

Decoding the Dwell Time Opportunity

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Today's presentation...

TFWA

All data taken from Pi Insight's 2023 Global
Shopper database...

5,000

Duty Free shopper interviews

among key Asia Pacific nationalities



Buyers from categories
including...

Alcohol

Beauty

Confectionery

Tobacco

Fashion & Accessories

Watches & Jewellery



Today's presentation...

TFWA

**Understanding
the Dwell Time
Opportunity**

**Positioning Duty
Free in the Dwell
Time Opportunity**

**Taking Advantage
of the Dwell Time
Opportunity**



Decoding the Dwell Time Opportunity...

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The Asia Pacific Traveller...

TFWA

377m
International
departing PAX
from APAC
airports in 2023

Source: Forward Keys

Female

50%

40 & Under

55%

Leisure

82%

1 – 3 trips

88%

Travelling alone

13%



But with one thing in common...

TFWA

**Time spent in the
airport**

1hr 54mins

**Time spent in the
departures**

1hr 21mins



Engagement in numerous activities...

Average airport activities:

3.8

vs. Global: 3.6

51%

Duty Free shopping

48%

Activities on mobile device

43%

Buying take-away food

40%

Having sit down meal

38%

Relaxing in seating area

24%

Reading a book / news



With Duty Free acting as a key activity...

TFWA

APAC Duty
Free Footfall:

51%

vs. Global: 44%



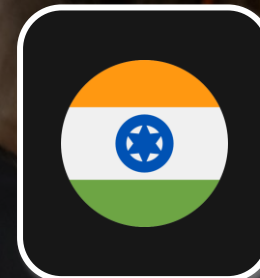
61%



53%



48%



48%



43%



And key use of departures dwell time...

TFWA

Time Spent in
the DF Store:

28 minutes

vs. Global: 25 mins



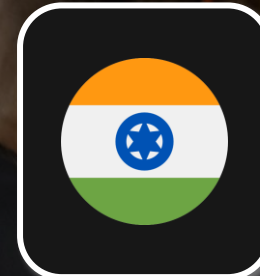
32



32



27



25



22



With all categories benefitting...

TFWA

Fashion
13mins

Beauty
12mins

Alcohol
10mins

Food
9mins

Tobacco
8mins



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Planned & impulsive visiting...

TFWA

31%

Plan to visit
before setting
off



10%

Plan to visit
when travelling
to the airport



24%

Plan to visit
when in
departures



35%

Only decide to
visit when they
see the store



A purposeful shopping approach...

TFWA

Take advantage of airport prices

42%

What I always do when travelling

40%

Look for good promotions

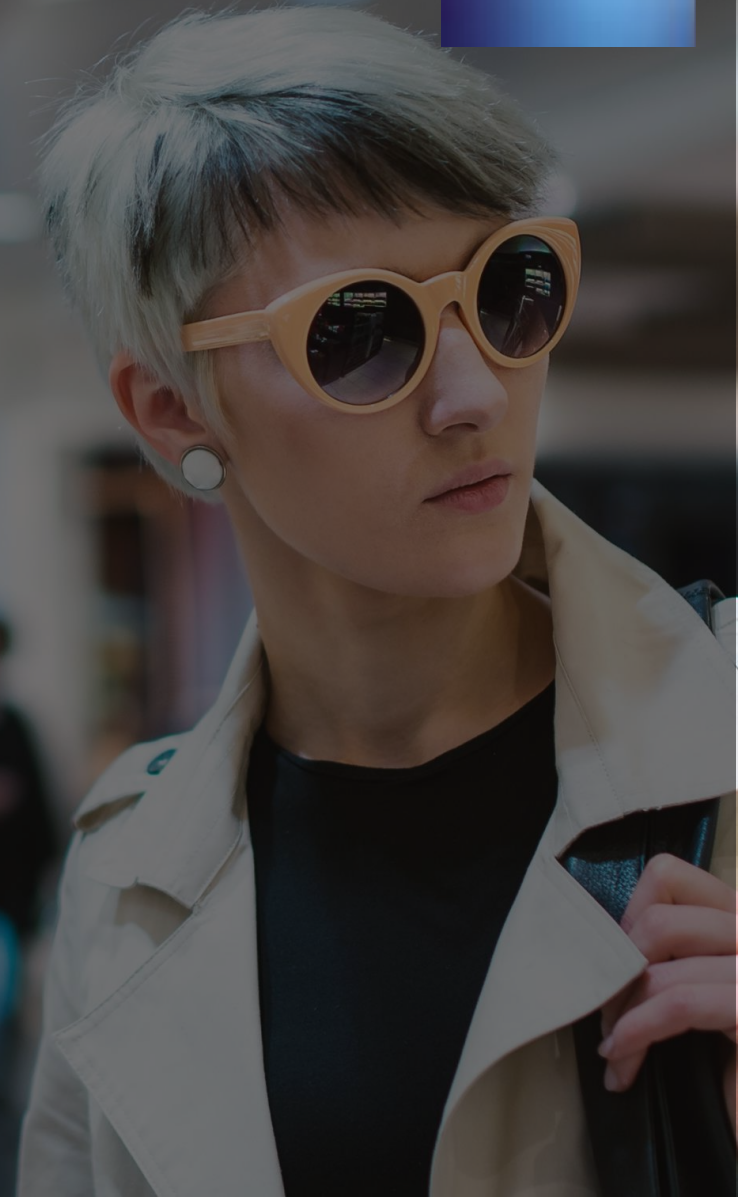
37%

To look for a gift

33%






To look for new or differentiation items

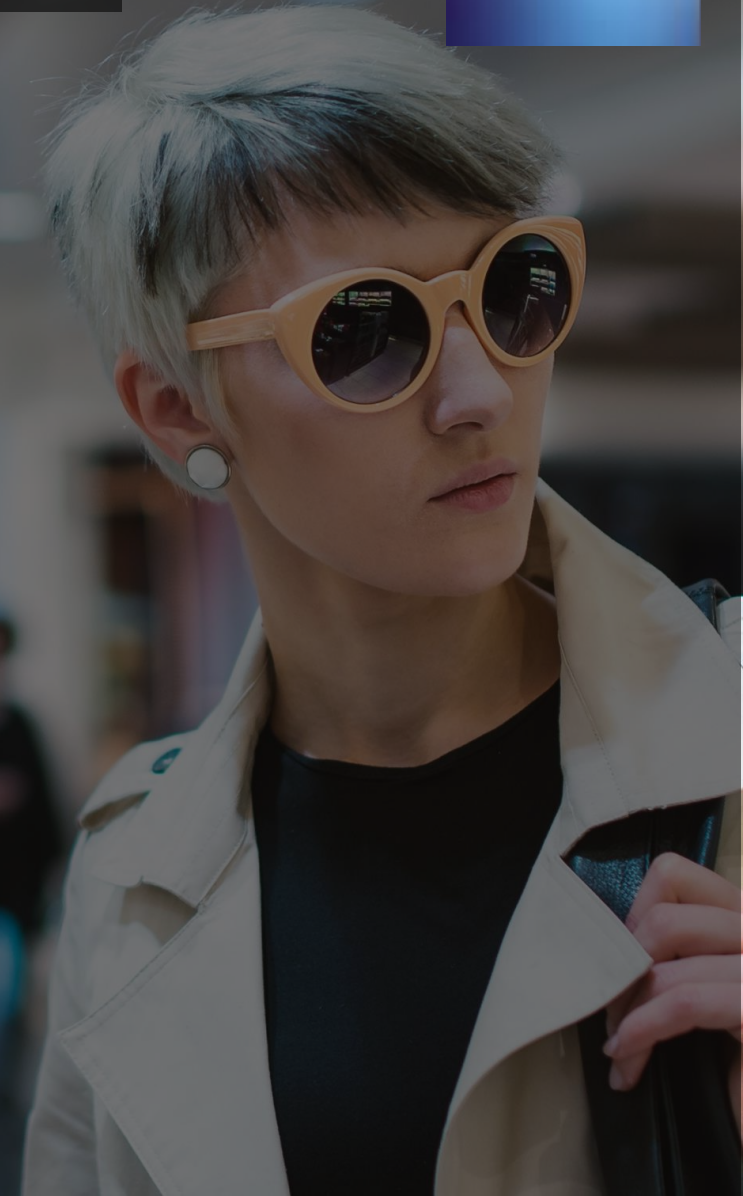
33%



But, different nationalities, different drivers...

TFWA

	To look for a gift	37%
	To look for new items	53%
	To look for good promos	53%
	To look for good airport prices	52%
	To treat myself	37%



And different times of the day...

TFWA

Singapore Changi T3: Key Nationality Dwell Times this Week



61% of Korean dwell time is between 21:00 - 00:00



56% of Chinese dwell time is between 09:00 - 17:00



81% of Australian dwell time is between 19:00 - 02:00



50% of Indian dwell time is between 15:00 - 22:00



Source: Forward keys

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Shopper spend time browsing...



Time Spent in
the DF Store:

28

minutes

Fashion
13mins

Beauty
12mins

Alcohol
10mins

Food
9mins

Tobacco
8mins



Reduced planning & planning extent...

TFWA

49%
Planned their
purchase
vs. 62% in 2019



25%
Planned their
exact item



26%
Planned their
brand



Interest in non-regular brands; a shift in dynamic...

TFWA

54%

Purchase a non-regular brand



A focus on key purchase drivers...

TFWA

Key purchase drivers...

Good quality

37%

Price cheaper than elsewhere

26%

Well known or international brand

24%

Attractive promotion

22%

Looks new & different

21%

For a treat or reward

20%



Dwell time can also be used to drive lasting influence...

83%

have seen brands that they have not seen before / are unavailable at home

70%

have their brand knowledge & opinion improved due to their purchase

60%

interact with major activations when in their key categories of interest

66%

have purchased a brand in Duty Free for the first time when travelling internationally

40%

look to purchase the brand they buy in Duty Free in domestic when back home

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There is a clear dwell time opportunity with travellers **arriving at the airport early, spending time in departures and 28 mins in store**

Duty Free can be further positioned within the dwell time opportunity through **the effective communication of key footfall triggers**

Among those that visit the store, dwell time can be used to **influence shopper decision making there and then as well as future behaviours**



Thank you!

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