

BOOMING?

OR

BUST?

GLOBAL TRAVEL RETAIL
2030



- 8.2bn passengers will travel by air in 2037
- China will be the world's largest aviation market
- ▶ Thailand is expected to enter the top 10 markets in 2030, replacing Italy, which will drop out of the ranking.
- India will surpass the UK to become the third largest aviation market around 2024
- Indonesia is expected to climb from tenth in 2017 to fourth by 2030
- Asia Pacific will contribute more than half the new passengers between 2018 and 2037

IATA 20 YEAR PASSENGER FORECAST

Country pairs with the biggest changes in passenger numbers

(International only)

Country pair	Additional million pax per year by 2036	Annual growth
India – UAE	20.2	5.9%
China – Thailand	19.1	4.3%
China – Korea	17.7	3.6%
China – Singapore	15.0	7.0%
USA – Mexico	14.9	2.3%
Indonesia – Malaysia	12.6	5.8%
USA – Canada	12.3	2.0%
China – Chinese Taipei	11.2	3.4%
China – USA	11.0	4.2%
India – USA	10.5	5.6%





Male
Age 21

Male
Age 29

Female
Age 35

Female
Age 23

New Available



- ▶ Measuring store performance shifts
- ▶ Fewer transactions – more experience/emotion
- ▶ Success no longer measured by turnover
- ▶ Brands define value of store through data
- ▶ Lease terms much more flexible
- ▶ Lower fit out cost

WILL AIRPORT-RETAILER-BRAND CONCESSION STRUCTURE CHANGE TOO?

THE ROLE OF THE STORE IS CHANGING

10:50	MOSCOW/SUD
11:05	EDINBURGH
11:05	LONDON/LHR
11:10	BUCHAREST/OTP
11:30	KIEV/BORISPOL
11:35	MILAN
11:45	EAST MIM. A4003
12:15	SOFIA
12:30	LONDON/LGW
12:30	NEWCASTLE
12:40	ST PETERSBURG
12:40	LONDON/LGW
12:45	MANCHESTER









25

26

27

28

29

30

31

32

be relax



be relax

dermalogical

be relax

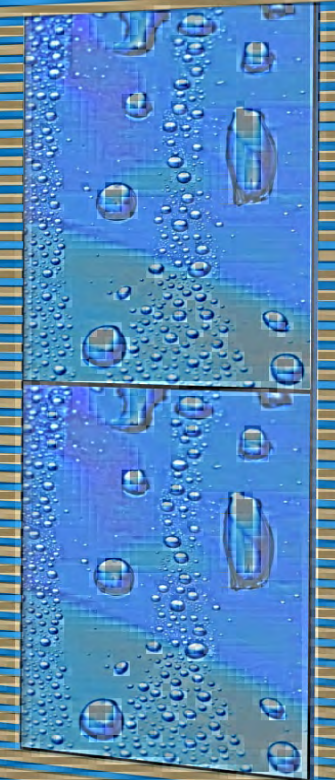
JUICE BAR

- Lemon juice
- Blueberry juice
- Orange juice
- Apple juice
- Grapefruit juice
- Pineapple juice
- Watermelon juice
- Strawberry juice
- Peach juice
- Mango juice
- Kiwi juice
- Raspberry juice
- Blueberry juice
- Orange juice
- Apple juice
- Grapefruit juice
- Pineapple juice
- Watermelon juice
- Strawberry juice
- Peach juice
- Mango juice
- Kiwi juice
- Raspberry juice

Massage

Massage

Massage



TRAVELASANA

WITH @MALAIKABSL

#2 MIAMI AIRPORT YOGA ROOM











Supreme

Champion



VANS




boohoo.com
TWENTYFOUR | SEVEN | FASHION

Revenue +97% 2017 over 2016 (10 months) = US \$663m

PRETTYLITTLETHING

Revenue +232% 2017 over 2016 = US \$197.5m

A series of several parallel white lines of varying lengths and orientations, starting from the bottom right and extending towards the top right, creating a sense of motion and modern design.







- ▶ Over 60s – 1.4 bn
- ▶ 34 countries in developed world 'Super Aged'
- ▶ 20% + population 65+
- ▶ 60+ will generate 51% urban consumption
- ▶ AND 19% of all growth

TIME. DISPOSABLE INCOME.

DON'T IGNORE THEM

WORLD POPULATION PROSPECTS 2030





- ▶ 15-59 age group most influential
- ▶ Expand by 20% to 2030
- ▶ Additional 100m people – per capita consumption to double
- ▶ Spend 12c of every \$ worldwide

TRAVEL. PREMIUM BRANDS . DIGITAL

CHINESE CONSUMERS 2030



Fragrances

SAVE \$400

Er6

SALE





Courtesy of AOE / Frankfurt
Airport



BVLGARI
ROMA



MISSONI

MaxMara



STELLA MCCARTNEY

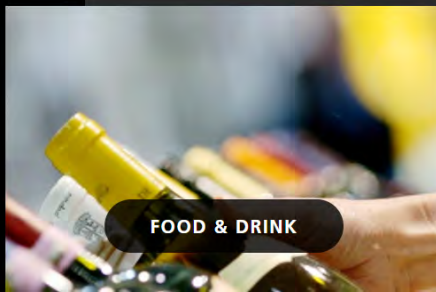
REISS

Paul Smith

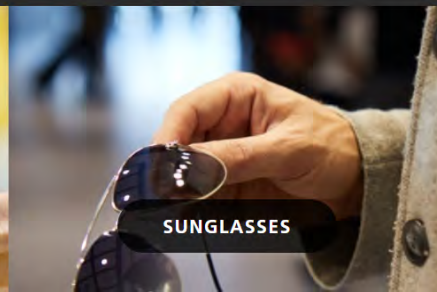
LOUIS VUITTON

Popular categories

Courtesy of AOE/Heathrow
Airport



FOOD & DRINK



SUNGLASSES



WATCHES & JEWELLERY



WOMEN'S FASHION



LOYALTY CARD

1234 5678 9012 3456

NAME SURNAME



Airport shopping

Cancel

Airport shopping

Cancel

Airport shopping

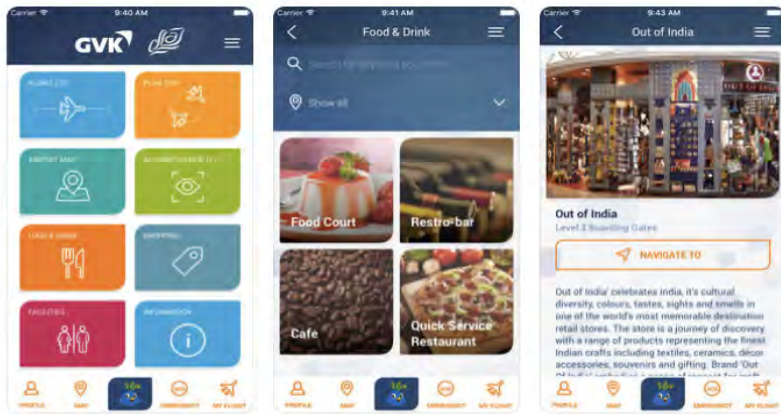
Cancel



Mumbai T2 App

Travel

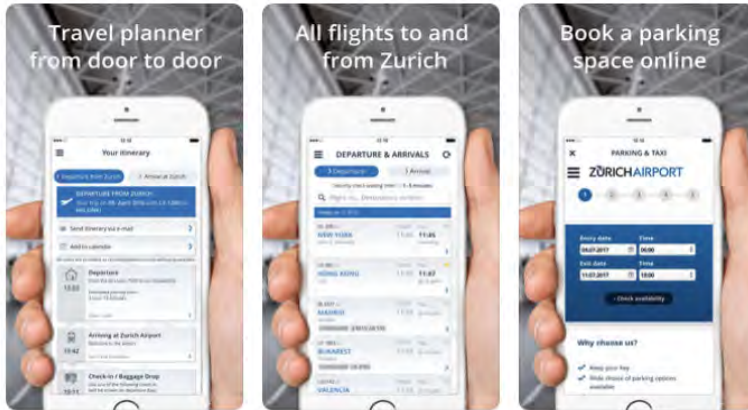
GET



Zurich Airport App

Travel

GET

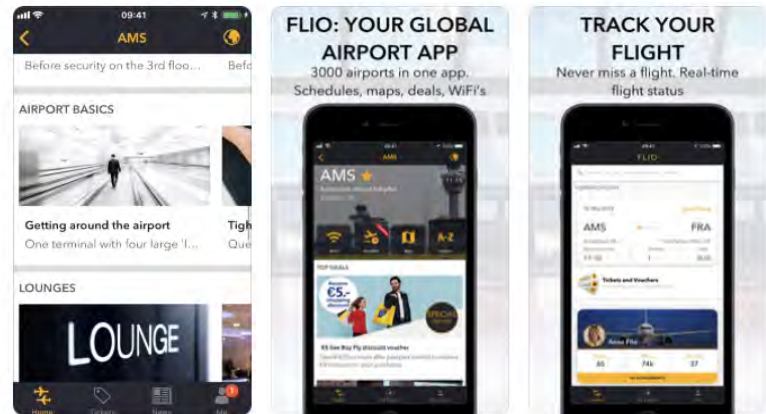


FLIO - The Global Air...

Flight tracker Lounges Park...

GET

★★★★★ 169



Eurest Heathrow

Food & Drink

★★★★☆ 13

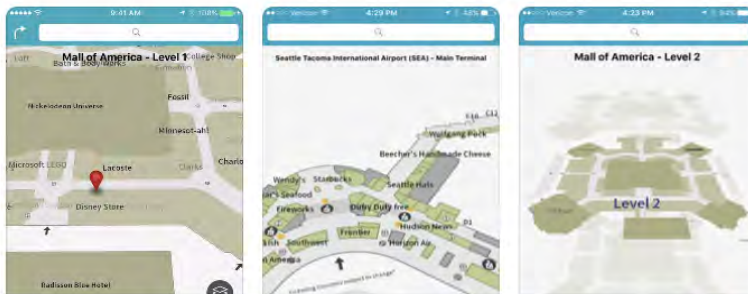
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Point Inside Shoppin...

Shopping

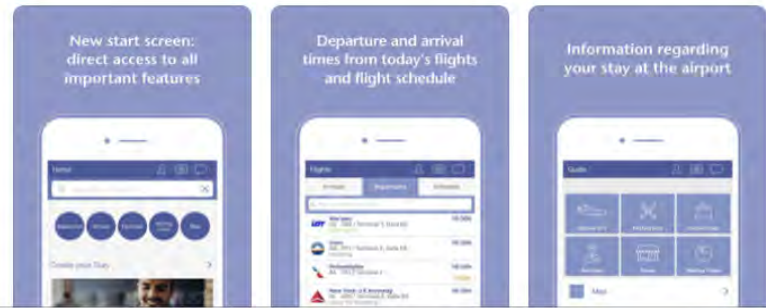
GET



Frankfurt Airport (FRA)

FRA Airport

GET





SPECIAL PRICE

99 \$

SPECIAL PRICE

125 \$

UNIQLO

CROPPED LEGGINGS PANTS

This summer be stylish and comfortable. With an added dry feature, these pants will keep you feeling cool.

29.90

UNIQLO

UNIQLO

UMOOD

FIND THE RIGHT T-SHIRT FOR YOUR MOOD

UNIQLO

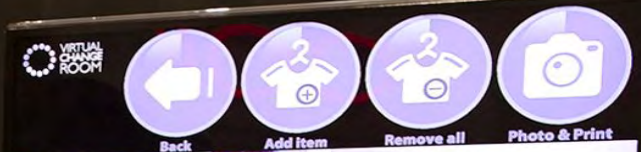
CHINO SHORTS

Chino shorts may be basic, but they're anything but boring. Crafted from 100% cotton and cut to smoothly fit your style, no matter where the season takes you.

19.90



VIRTUAL CHANGE ROOM



Robina Town Centre

Robina Town Centre

Robina Town Centre

Robina Town Centre

Robina Town Centre

Robina Town Centre

Robina Town Centre

Robina Town Centre

Robina Town Centre

Robina Town Centre

Robina Town Centre

Robina Town Centre

Robina Town Centre

Robina Town Centre

Robina Town Centre

BUD VIRTUAL REALITY

Fashion Show

The future of
with style

Take a social step
the virtual
up your
all

BEL

ck

Design

PIE

FIRE WALK

CUTIES

BRAND

ARTIST



FLORIAN

WALKER



A jövő és stílus találkozása

Foglalj
divatber
vásárolj
hirdetv

an exkluzív
és
ait



bud Budapest
Airport

Male
Age 30



Coffee shop 50-55M
★★★★★ 210 votes

Espresso
Cappuccino
Americano
Latte
Mocha



FLIGHT ALERT

NY → SEA

Airways 351

3.15pm

Gate 9

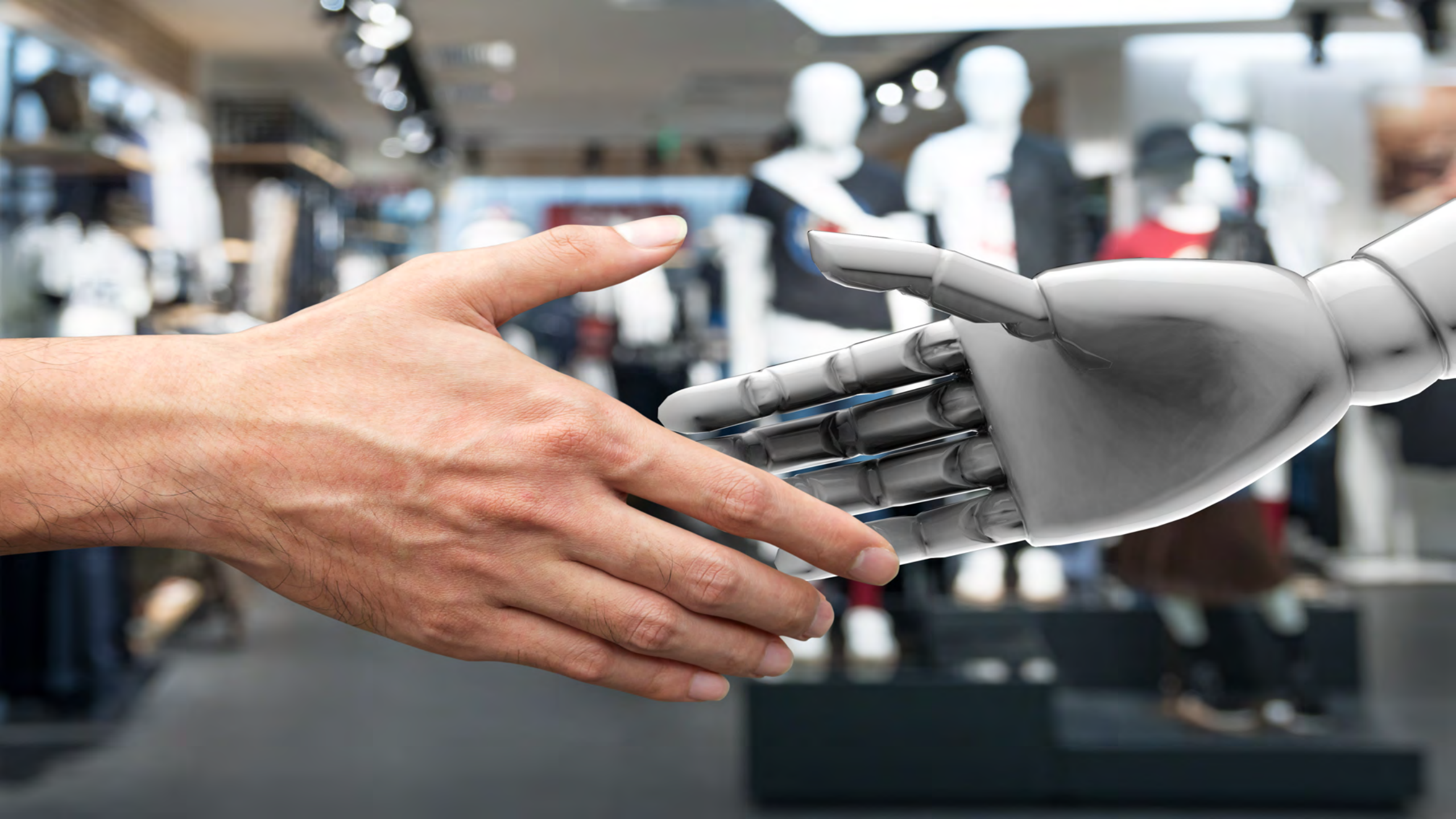


2.45 pm

NY Airport







ROYAL OVERSEAS GROUP

Aitrington

37

MANCHESTER
GLASS LTD.
0161-292 8444

MANCHESTER
GLASS LTD.
24 HOUR
EMERGENCY
BOARDING
0161-292 8444

MANCHESTER
GLASS LTD.
24 HOUR
EMERGENCY
BOARDING
0161-292 8444

0161-292 8444

Bestival
SUNDAY BEST 2011
SUNDAY BEST 2011
SUNDAY BEST 2011

DE LA SOUL	DE LA SOUL	DE LA SOUL
DAN LE SAC	DAN LE SAC	DAN LE SAC
IS SCROOBIS PIP	IS SCROOBIS PIP	IS SCROOBIS PIP
THE BURNING	THE BURNING	THE BURNING
THE BURNING	THE BURNING	THE BURNING
THE BURNING	THE BURNING	THE BURNING

RETRO BOXING DAY SPECIAL 26.12
WAREHOUSE PROJECT MANCHESTER
PAUL TAYLOR
EMERGENCY BOARDING

The Lady Boys Bangkok
Get to 12P! No Olympia Theatre
West Derby Road
LIVERPOOL
0871 702 9506
www.ladyboysbangkok.co.uk

STEVE SMOOTH SUTHERLAND
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STEVE SMOOTH SUTHERLAND
STEVE SMOOTH SUTHERLAND

EMERGENCY BOARDING
EMERGENCY BOARDING
EMERGENCY BOARDING
EMERGENCY BOARDING
EMERGENCY BOARDING

DOORS: 1.30AM TO 9AM
SATURDAYS@ AREA51
NOVEMBER 08
OLIVER LANG
CIRCOLOCO
DALEY PADLEY
TOM NOVY
NEIL JAMES
07977 462522
TICKETS - WWW.SKIDDLE.COM/GROUPS/AREA51
WWW.MYSPACE.COM/AREA51CLUBBING
WWW.AREA51CLUB.CO.UK

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PROMISELAND & CHITRE (T.M.I.M.)
MEET BABYLOVE & LOVEBUGS
WILEY : JASON Y2 KAYE
SUPA D: MA1 : NAUGHTY : MARCUS NASTY
CRAZY COUSINZ : PALEFACE B2B MYSTIC NATT
PLUS 10 OTHER DIS
MC'S : VIPER : GEMINI : STEVEO
CRAZY COUSINZ 'BONGO JANT'
PALEFACE 'DO YOU MIND'
MC VERSATILE 'THE FUNKY ANTHEM'
SACHA PERF 'BE WITH ME' : STOCK PA
SAT 29TH NOV
@CLUB 18 - PRESTON
9-AM: FIRST 300 TICKETS £13.50 + BF: 08707570220

Done
Cold
Barracuda
Was
Er2
Dm

RockStock

