

HANEDA

Tokyo  
International  
Airport



# The Future of the Airport Retail Business

Executive Vice President  
Japan Airport Terminal

**Hiroshi Onishi**

# The Future of the Airport Retail Business

Net Sales = 100billion yen  
(Retail, Restaurant, Wholesale)

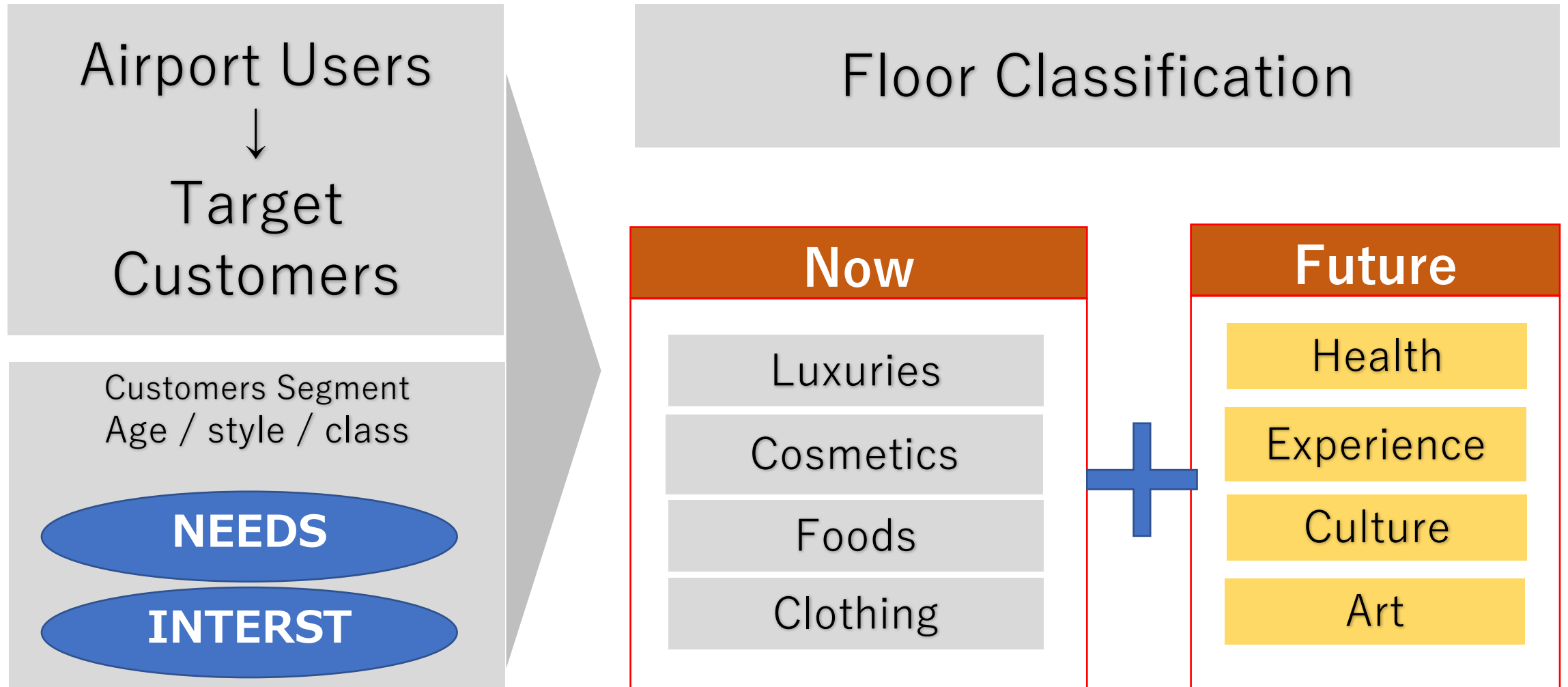
Large scale shopping center that also functions as a town

(Billion Yen)

Shopping Center	2015	Department Store	2017	Ecommerce	2016
LAZONA KAWASAKI	77	ISETAN SHINJYUKU	268	Amazon Japan	1108
GOTENBA OUTLETS	76	HANKYU UMEDA	220	YODOBASHI CAMERA	108
NISHINOMIYA GARDEN	74	SEIBU IKEBUKURO	187	ZOZO	76
LALAPORT TOKYO-BAY	72	MITSUKOSHI NIHONBASHI	165	SENSYUKAI	74
AEON LAKETOWN	58	TAKASHIMAYA NIHONBASHI	133	RAKUTEN	60

# What is the current issue?

~NEW CONTENTS~



# What is the current issue?

~NEW CONTENTS~



【Airport Operation】 + 【Shopping Center】

+

【Cultural Creation Base】

NEW

Pass Point

→

Stay Point

→

Gathering Point

NEW CONTENTS



# Market Changes

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## **① End of Manufacturer-led, mass-produced, Low Cost models**

→How should we respond to that as a retail operator?

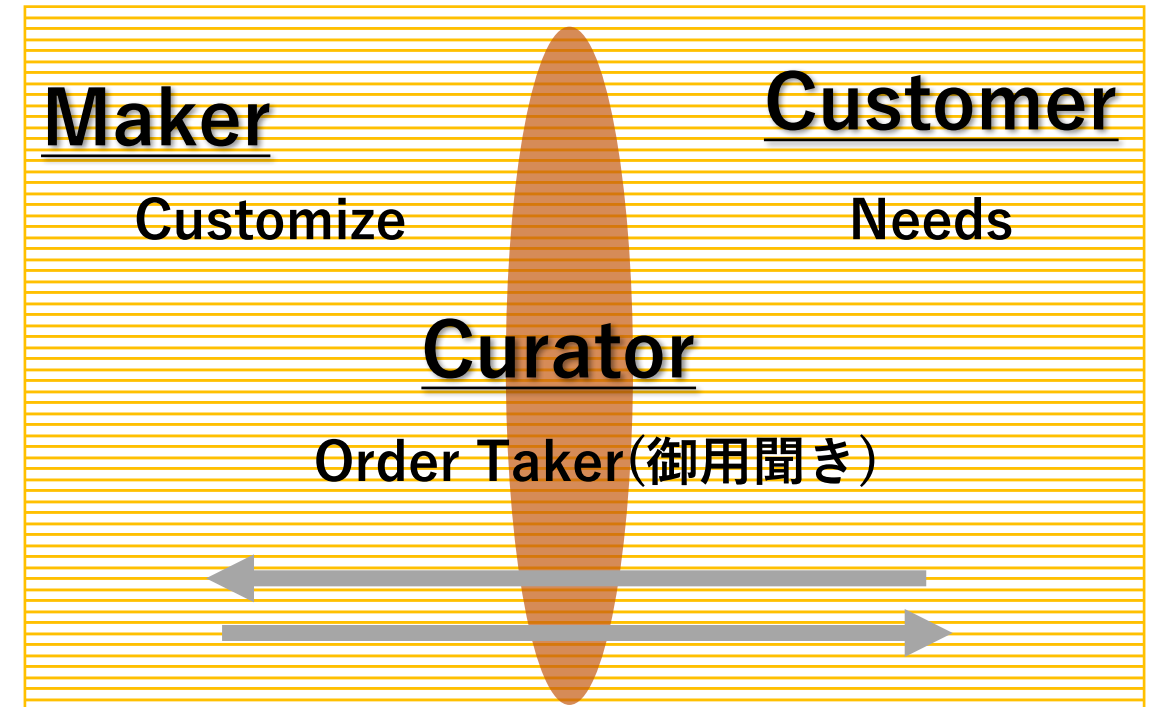
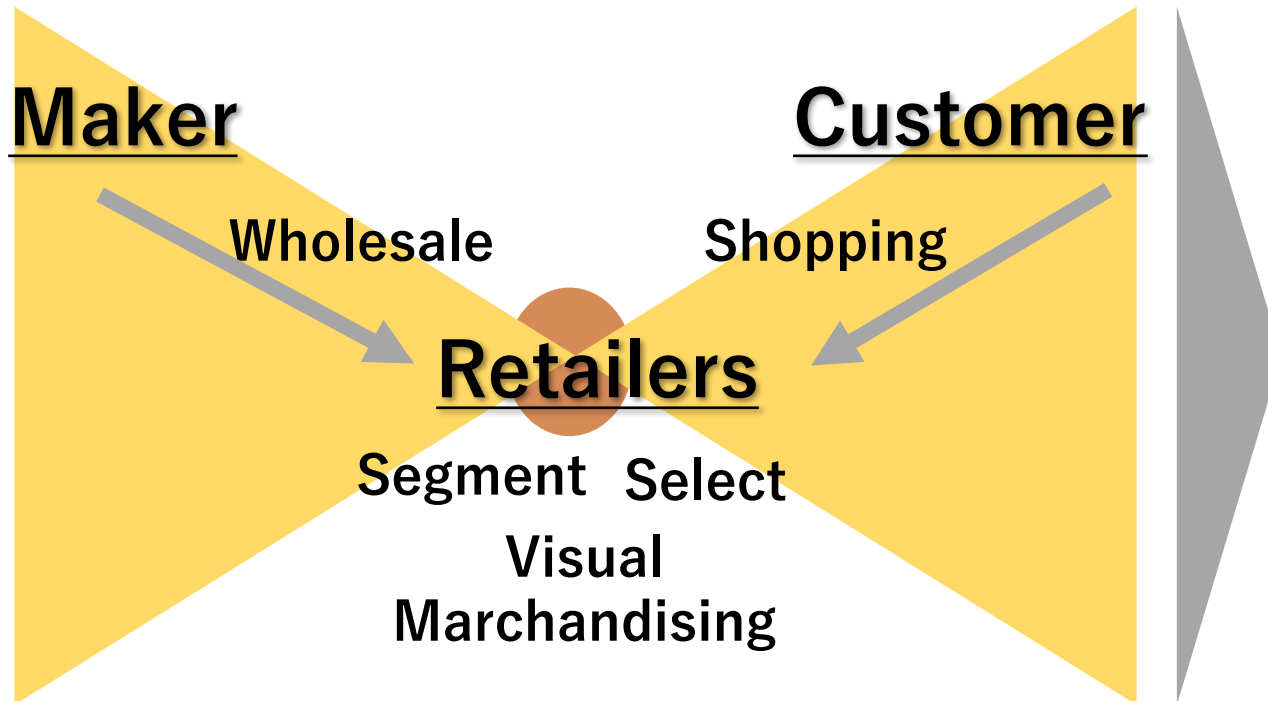
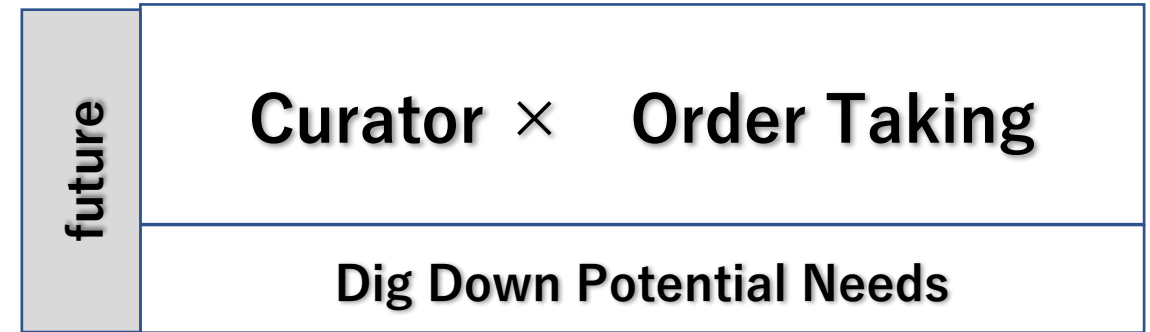
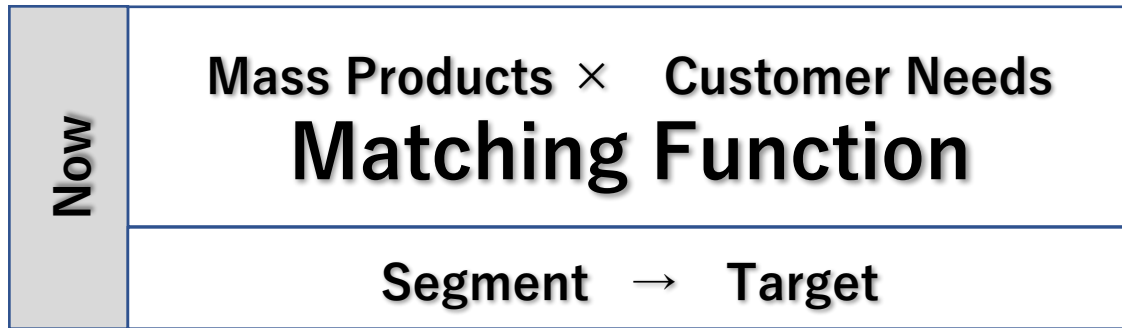
## **② Increasing investment in technologies**

→How should we recoup the investment ?

## **③ Rise of virtual consumption**

→What kind of Value should we provide at physical stores?

# ① End of Manufacturer-Led, Mass-Produced, Low Cost Models



# ① End of Manufacturer-Led, Mass-Produced, Low Cost Models

Create patterns based on individual body shapes at low cost



ZOZOTOWN 何かお探しですか?

ログイン NEW

ショップ: ZOZO  
ブランド: ZOZO

ZOZOSUIT

¥0 税込 (初回無料)

♡ お気に入りアイテム登録数: 164365人

ZOZOSUITのご利用に関して

ZOZOSUITの申し込みと計測は最新の「ZOZOTOWNアプリ」でのみ可能です。

Available on the App Store GET IT ON Google Play

アイテム説明

【ZOZOSUITがご注文後すぐにお届けできるようになりました。】

ZOZOSUITは、あなたの身体の寸法を瞬時に採寸することのできる

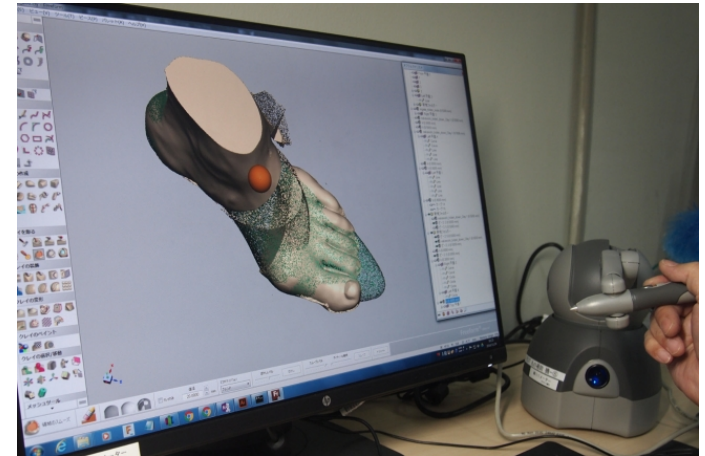
すぐにお届けできます



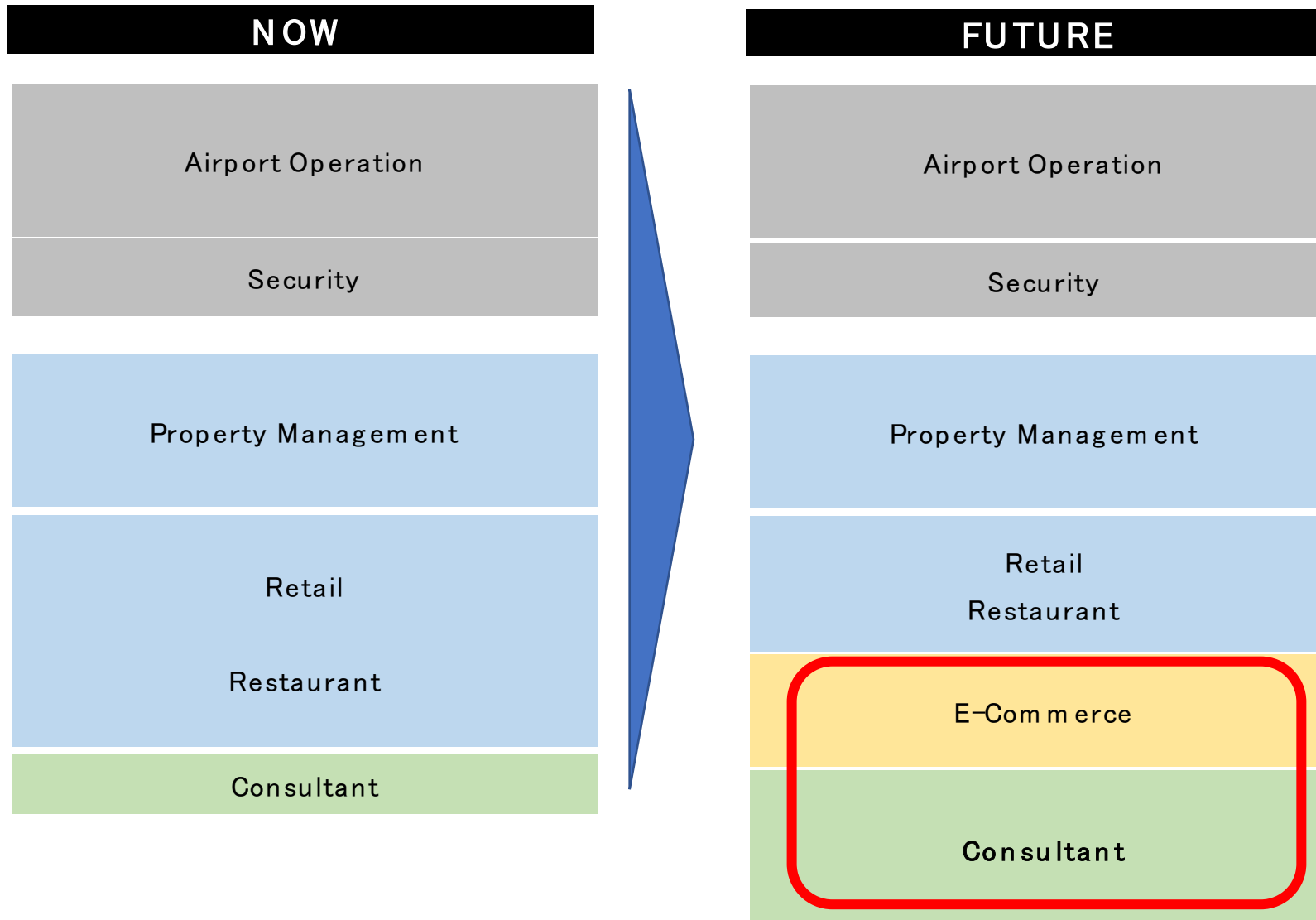


# ① End of Manufacturer-Led, Mass-Produced, Low Cost Models

Easy to produce shoes to order because shoe patterns can be readily produced with a 3D printer



## ② Increasing Investment in Technologies





## ② Increasing Investment in Technologies





## ② Increasing Investment in Technologies

Cleaning



Security



### ③ Rise of Virtual Consumption

Virtual

Purposes are Clear



INPUT&SERCH

Analytical

Positive Solution



Real

Unconscious



Serendipity

Convince



### ③ Rise of Virtual Consumption





### ③ Rise of Virtual Consumption



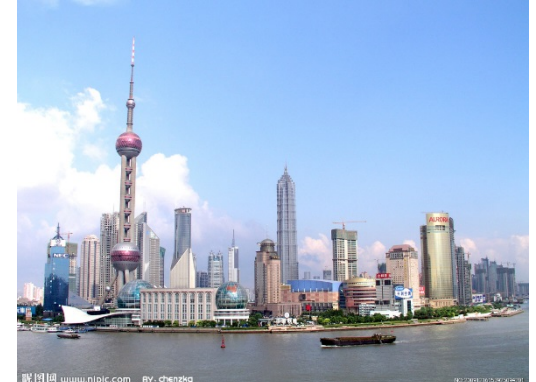
# Increase of Inbound Chinese Tourists

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**① From Goods to Experiences**  
**From Volume to Quality**

**② From the City to Countryside**

**③ From Inbound to Outbound**





# Glamping





# Renovated from old houses



**IWATE**

CHANNEL  
×  
TWEED



**KYOTO**

D I O R  
×  
Nishijin  
Brocade





**FUKUI**

MONCLER  
×  
Polyester



ダウンフェザーが抜けにくい高密度織物を使用  
サンローランやジル・サンダー、SACAIも信頼を寄せる



**OKAYAMA**

DENIM



HANEDA

Tokyo  
International  
Airport



**Culture**

**Regional  
revitalization**

**Information  
Strategy**

**Intellectual  
Business**