

# Identifying, Understanding & Influencing the MEA Duty Free Shopper

Stephen Hillam  
Managing Director  
Pi Insight



Today's presentation...

TFWA

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

**1,200**

**Duty Free buyer interviews**

*among key Middle East & African nationalities*



Buyers from categories  
including...

**Alcohol**

**Beauty**

**Confectionery**

**Tobacco**

**Fashion & Accessories**

**Watches & Jewellery**



**Identifying the Middle  
East & African Duty  
Free Shopper**

**Influencing Middle  
East & African shopper  
decision making**



**Identifying the Middle  
East & African Duty  
Free Shopper**

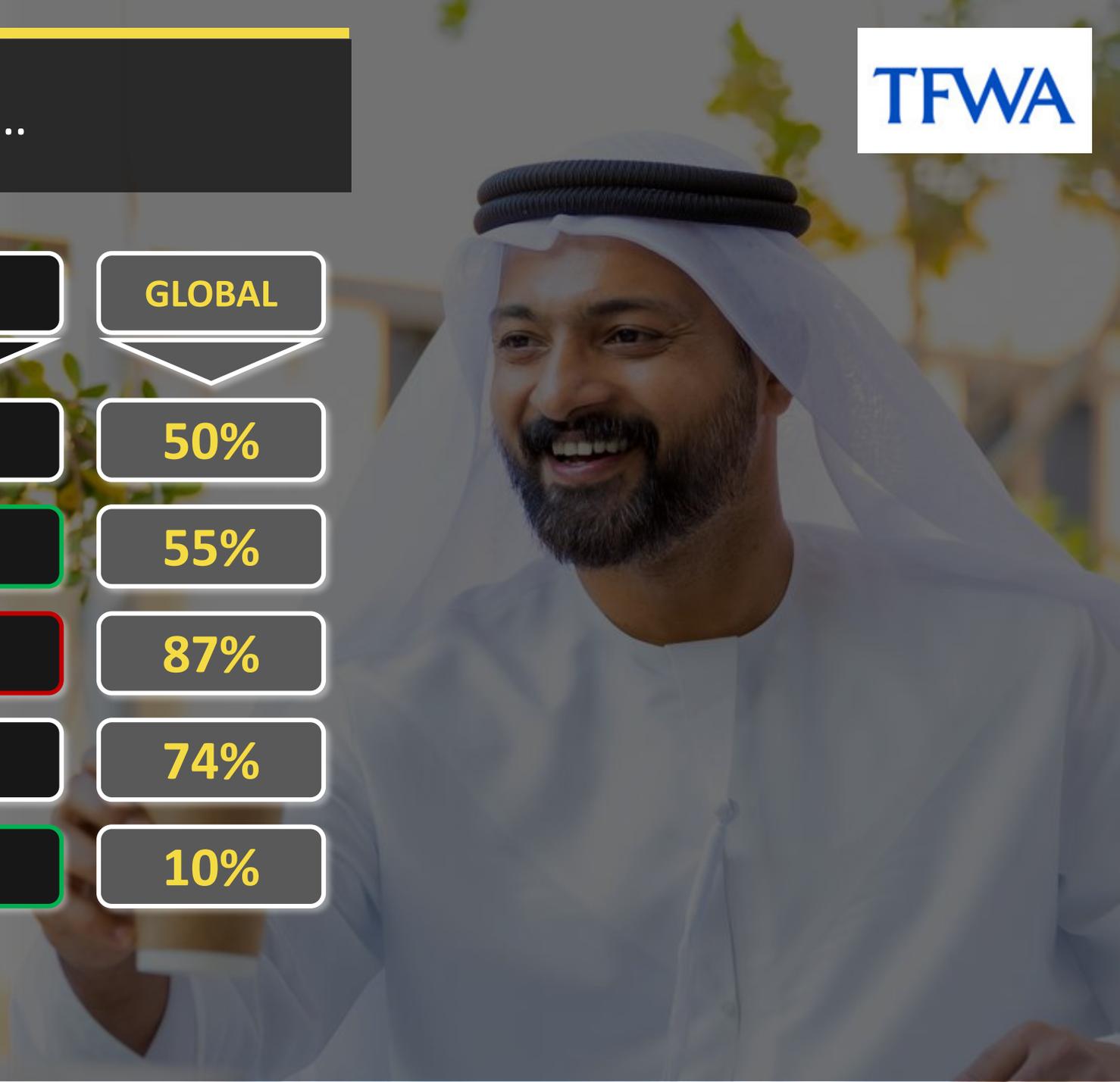
**Influencing Middle  
East & African shopper  
decision making**



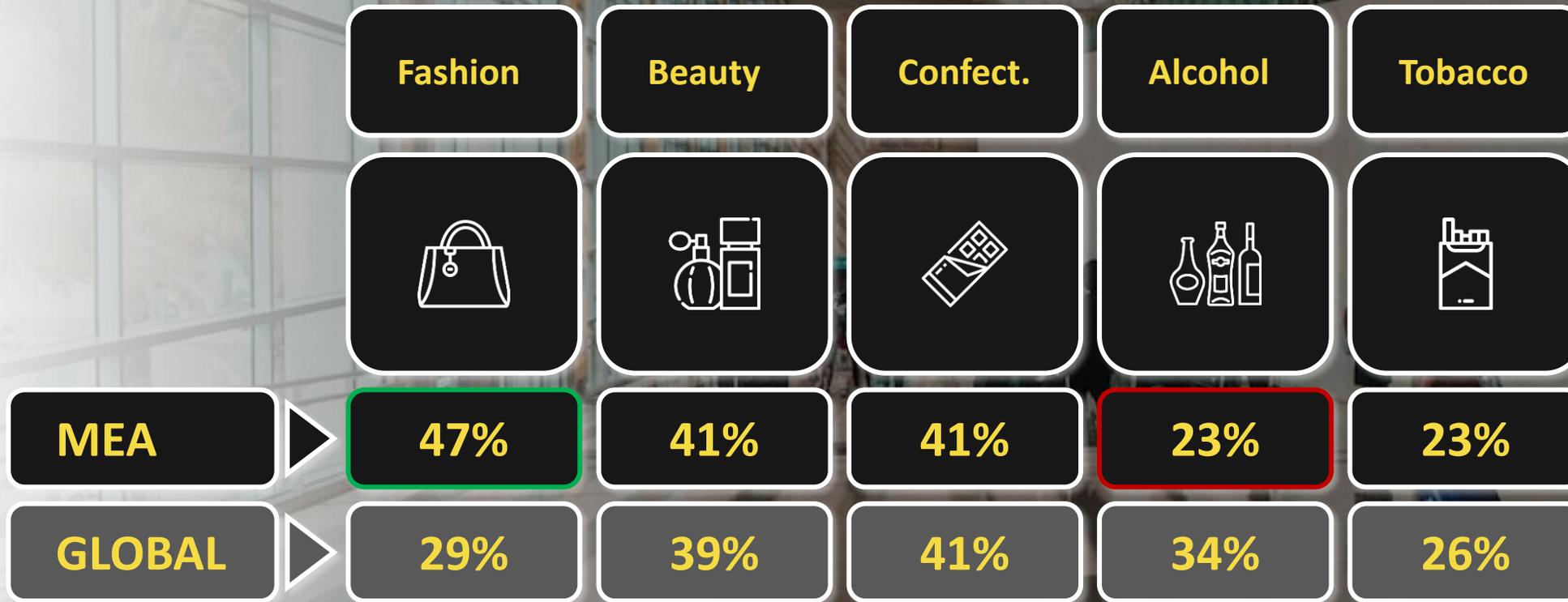
# The MEA Duty Free buyer profile...



	MEA	GLOBAL
Male	54%	50%
40 & Under	62%	55%
Leisure	76%	87%
1 – 3 trips	73%	74%
Travelling alone	18%	10%



# Increased luxury category interest...



# Fluctuating category spend levels...

**Fashion**



**US\$ 131**



**Beauty**



**US\$ 124**



**Confect.**



**US\$ 25**



**Alcohol**



**US\$ 97**



**Tobacco**



**US\$ 70**



# A purposeful shopping mentality...

**41%**

Treat  
myself

**41%**

Look for a  
gift

**41%**

Look for new  
products

**37%**

Take advantage  
of airport prices

**37%**

Look for good  
promotions



But with significant openness to influence...

TFWA

**44%**

Plan their  
purchase

**21%**

Planned their  
exact item

**27%**

Planned their  
brand



# Today's Presentation

TFWA

**Identifying the Middle  
East & African Duty  
Free Shopper**

**Influencing Middle  
East & African shopper  
decision making**



Influencing the purchase decision making process...

TFWA

**Differentiation**

**Reassurance**

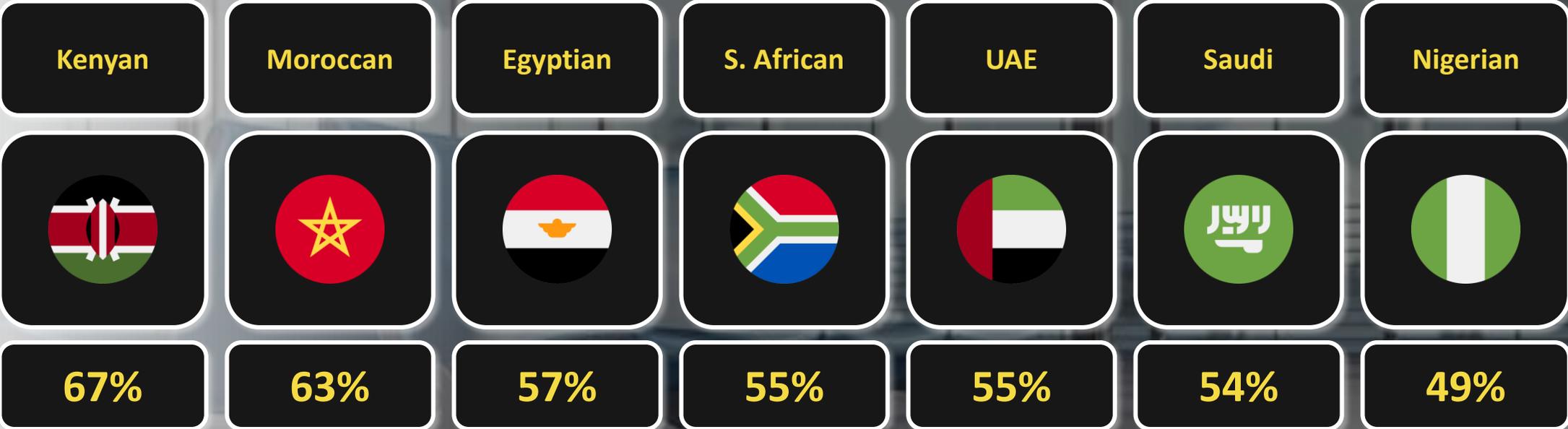
**Value**



# Interest in non-regular brands...



# High interest across each key nationality...

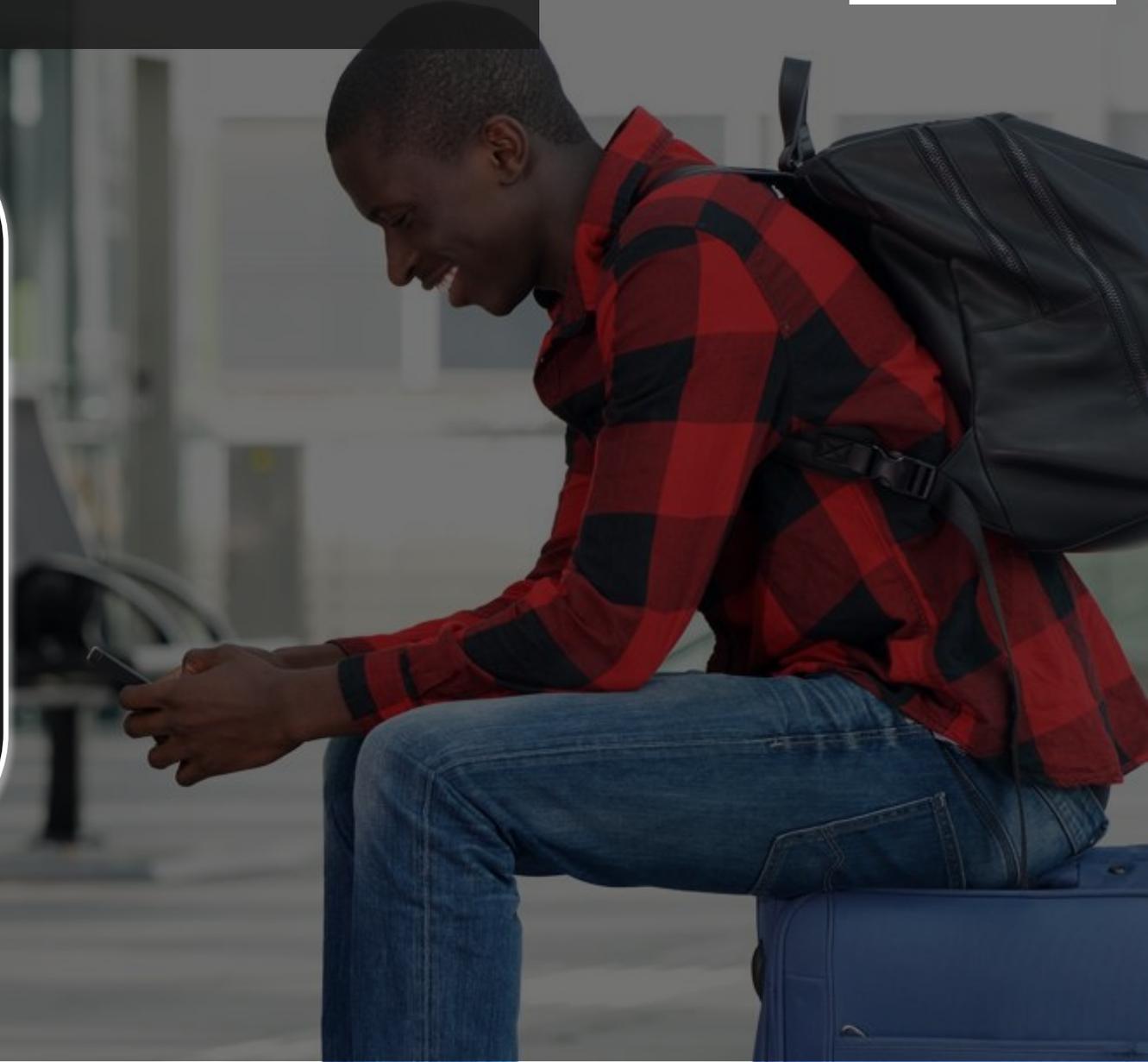


Duty Free Exclusives are key to meeting expectations...

TFWA

**94%**

**Consider Duty Free  
exclusives to be an  
important element of  
their shopper experience**

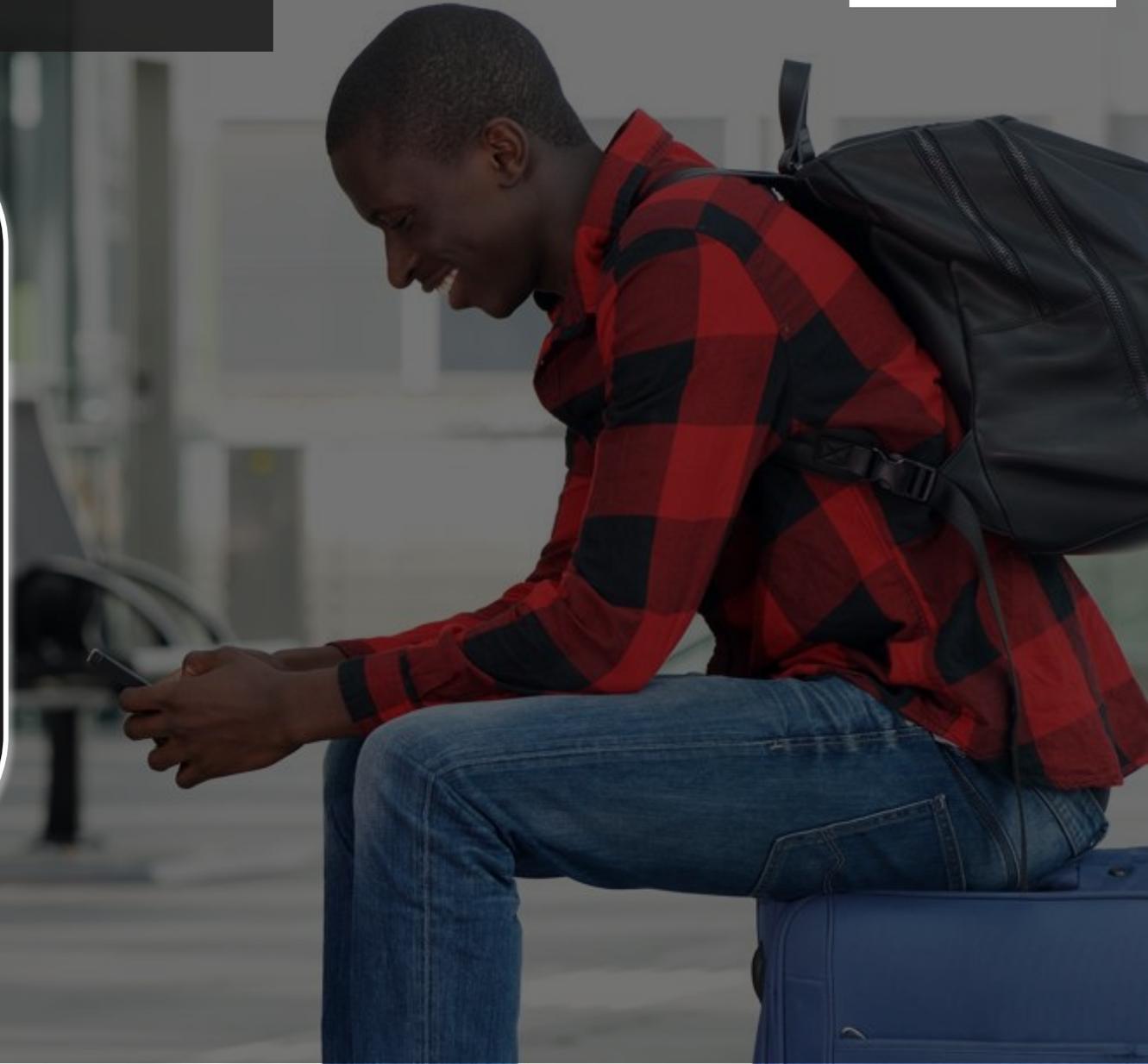


And can also impact decision making...

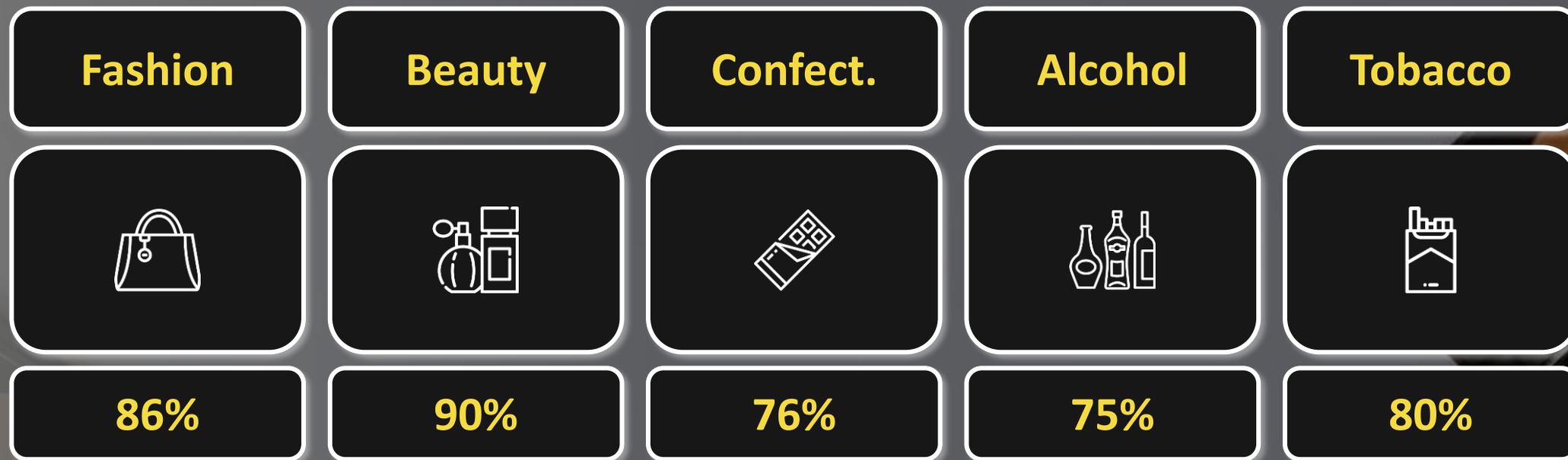
TFWA

**83%**

**Would be more likely to  
buy an item if it is a Duty  
Free exclusive vs. a  
standard product**



With this being particularly the case for luxury categories...



Reassurance is key to purchase conversion...

TFWA

## Key purchase drivers...

Good quality

45%

Well known/International brand

30%

Treat or reward

23%

Attractive promotion

21%

Usual brands

20%



Staff have a role to play in driving reassurance...

TFWA

**63%**

Of shoppers interact  
with staff when in the  
Duty Free store

Advice on specific items

**33%**

Advice on new items

**31%**

Advice on allowances

**15%**



And can also influence decision making...

TFWA

**67%**

Of those that interact  
with staff are  
positively influenced

**43%**

Had assistance  
choosing  
between items

**24%**

Would not have  
made a purchase  
without staff



Value perceptions are key to conversion...

TFWA

**21%**

Purchase due to items  
being cheaper than  
elsewhere

**18%**

Purchase due  
attractive promotional  
activity



But can also act as a purchase barrier...

TFWA

**45%**

Of non-buyers do not  
buy due to prices being  
too expensive

**37%**

Of non-buyers do not  
buy due to a lack of  
attractive promotions



Influencing the purchase decision making process...

TFWA

**Differentiation**

**Reassurance**

**Value**



**Identifying the Middle  
East & African Duty  
Free Shopper**

**Influencing Middle  
East & African shopper  
decision making**



The Middle East & African Duty Free shopper is **purposeful** when entering the Duty Free store

However, Duty Free shoppers in the region are heavily **open to influence and interested in experimentation**

**Differentiation, reassurance & value** are key to driving conversion and also shaping decision making



# Thank you!

Stephen Hillam  
Managing Director  
Pi Insight

