

APTRA exclusively releases new study to its members about Emerging Asia Pacific source markets

APTRA's "Tomorrow's Duty Free Customers" report Identifies and profiles travellers from 5 emerging Asia Pacific source markets



Asia Pacific source markets NOT considered "emerging" are:

- China:** Chinese are already established as THE number 1 source market in travel retail globally. They will continue to grow, but are no longer "emerging".
- Japan:** While Japanese are the second most prevalent Asian travellers, they are declining as a source market over time. Share of global passenger traffic is not growing and Japanese are only average spenders in airport duty free.
- India:** Indians come close to being defined as "emerging", but don't quite qualify. They are very high spenders in duty free, but their PAX traffic growth between 2012-2018 was lower than average.
- Australia:** While Australia's share of global PAX is growing, their per capita spend in airport duty free is average.
- Hong Kong, New Zealand, Indonesia and Vietnam:** share of global PAX is NOT growing AND they are average spenders in airport duty free.

Research and analysis by <https://www.horizonconsumerscience.com/>

Available free to members through the APTRA website, its study focuses on travelers from South Korea, Malaysia, Thailand, Singapore and Taiwan

The Asia Pacific Travel Retail Association (APTRA) is set to release exclusively to its members, a new study entitled *Tomorrow's Duty-Free Customers: Emerging Asia Pacific Source Markets*, which looks at non-Chinese Asia Pacific markets that are emerging for travel retail.

While it is acknowledged that mainland China is the key driver of growth in travel retail sales, accounting for 12% of international passenger traffic and 44% of airport travel retail spending, other travelers from Asia Pacific, particularly from Japan and India, are also significant contributors, accounting in total for 23% of travelers and 21% of spend.

This report, which is available free to members through the APTRA website, draws on data from Horizon's Travel Retail Catalyst Study (TRaCS) to analyze emerging source markets. As they are not markets in which both spend per capita and volume of travelers are increasing simultaneously, China, India and Japan do not qualify as "emerging" markets. The APTRA study, therefore, focuses on travelers from South Korea, Malaysia, Thailand, Singapore and Taiwan.

The distinctive characteristics of travelers from each of these markets have been studied in detail by Horizon, including customer demographics, shopping priorities while traveling, purchase motivations, product category penetration, favorite brands, the appeal of travel exclusives and the popularity of independent vs. group travel.

Grant Fleming, President APTRA, comments: "This report gives the industry an excellent regional perspective on what is coming down the line. APTRA continues to commission meaningful research

into topics that will be of practical help to our members, stimulating debate, which helps them to formulate their future commercial retail strategies and, most importantly, to strengthen, nurture and protect our industry.

Much has been said about the strength of the Chinese traveler market but the characteristics of emerging shoppers in other travel retail markets are less well understood. This new report provides robust data about five important markets, which represent an exciting potential revenue stream for our industry. It offers a wealth of data and analysis which are available to APTRA members.”

This report is available exclusively to APTRA members through the “Members Only” section of the website www.aptra.asia. If you are not already a member, join now and access this and all other reports.

The top-line results from this research will be presented by Michael Feely, COO of Horizon Consumer Science, at APTRA’s next Insights Seminar, which takes place on November 21 in Singapore at the KPMG Offices Clubhouse. All APTRA members are invited to attend. Contact admin@aptra.asia for registration details.