

Russian International Traveller & Shopper Report 2015



Putting the **right** detail
into travel retail

CiR Research – Russian Nationality Study

Counter Intelligence Retail (CiR)

JUNE 2015

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4.4 CHANGING TRAVEL EXPERIENCES

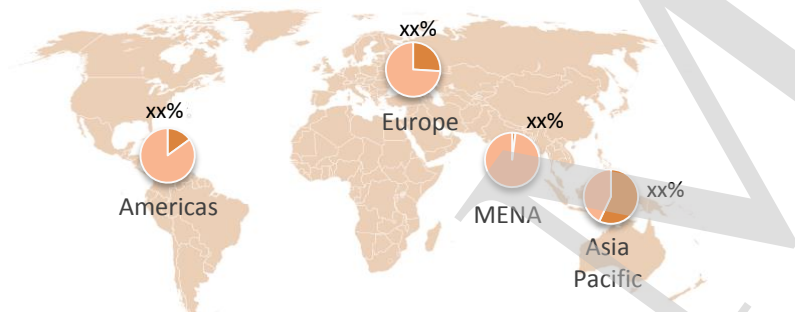
FLYING FREQUENCY NOW VS. LAST 2 YEARS

TRAVEL PURPOSE	FLYING FREQUENCY NOW VS. LAST 2 YEARS			LIKELY TO FLY IN NEXT 2 YEARS
	MORE FREQUENTLY	SAME	LESS FREQUENTLY	
Business	xx%	xx%	xx%	xx%
Leisure	xx%	xx%	xx%	xx%

- X
- X

Xxx are travelling to xxx destinations, with xxx destinations significantly higher than xxx at the moment, but choice of destination is changing

CONTINENT VISITED ON THIS TRIP



MAIN DESTINATION VISITED



- X
- X
- X

CONTINENT VISITED

	2009-2011	2012-2014	2015-2016
Asia Pacific	xx%	xx%	xx%
Middle East	xx%	xx%	xx%
Africa	xx%	xx%	xx%
Europe	xx%	xx%	xx%
Americas	xx%	xx%	xx%



5.9.2 SUB-CATEGORY PURCHASE BEHAVIOUR - BEAUTY



FRAGRANCE



COSMETICS



SKINCARE

VISITED*	xx%	xx%	xx%
BOUGHT*	xx%	xx%	xx%
CONVERSION*	xx%	xx%	xx%
AVERAGE SUB-CATEGORY SPEND	\$xx	\$xx	\$xx
AVERAGE ITEMS PURCHASED	x.x	x.x	x.x
% SPEND OF BEAUTY SPEND	xx%	xx%	xx%
No. 1 BEAUTY BRAND	<input type="text"/>	xx%	
No. 2 BEAUTY BRAND	<input type="text"/>	xx%	

- Xxx
- xxx

* %s show relative performance within category. All %s are inflated vs. Travel Retail overall due to all being DF visitors and quotas set on category buyers.

7. MOTIVATIONS TO PURCHASE BY CATEGORY

- This section provides a deep-dive investigation into each category individually. It focuses on the main item purchased and investigates in more detail:
 - Gift/self/request purchasing & recipient profile if not for self-use
 - Planned or impulse purchase
 - Reasons to purchase and key drivers influencing product selection
 - Role of promotions, Travel Retail Exclusives and staff
 - Dominant brands
 - Trade-up & first-time buying
- Each category is summarised individually so can be read in isolation. The sequence of topics is:

7.1		Alcohol
7.2		Beauty
7.3		Confectionery
7.4		Tobacco
7.5		Fashion & Accessories
7.6		Jewellery
7.7		Watches
7.8		Non-buyers

WHY DO THEY SHOP BEAUTY?

PURPOSE OF PURCHASE

BUYER PROFILE

SELF xx%

GIFT xx%

REQUEST xx%

xx%	xx%	<35 yrs	xx%
xx%	xx%	35+ yrs	xx%
xx%	xx%	<35 yrs	xx%
xx%	xx%	35+ yrs	xx%
xx%	xx%	<35 yrs	xx%
xx%	xx%	35+ yrs	xx%

Beauty purchasing is predominantly for xxx (xx%), with 1 in x for xxx (xx%)

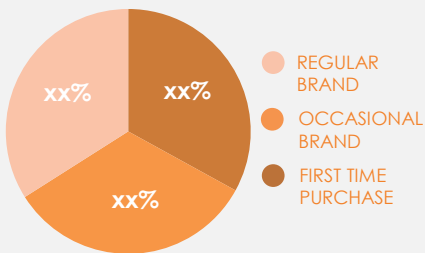
xxx are most likely to purchase for self (xx%) compared to xx% of purchasing a gift

xxx travellers are also more likely to purchase for self (xx% under 35yrs), with xx% of gift buyers aged over 35yrs

xx% purchase Beauty as a request, with buyers most likely to be xxx (xx%)

SELF PURCHASING

BRAND PURCHASED



NON REGULAR PURCHASE DRIVER

1. xxx xx%
2. xxx xx%
3. xxx xx%
4. xxx xx%
5. xxx xx%

There are **low levels** of xxx within Beauty with the majority of buyers preferring to purchase xxx (xx%)

Buyers that purchased outside their regular brand were xxx and xxx.

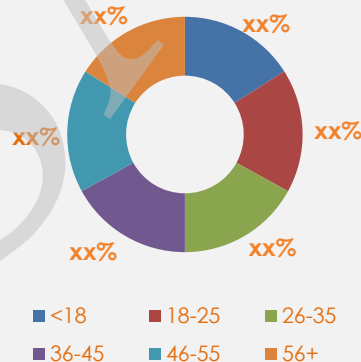
xxx is also very important, influencing nearly 1 in x buyers

GIFT PURCHASING – RECIPIENT PROFILE

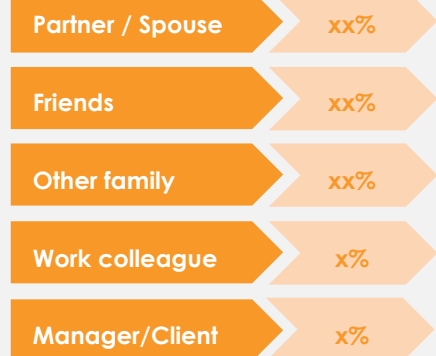
GENDER



AGE



RELATIONSHIP



Beauty gifts are predominantly purchased for xxx, with nearly half of purchases for xxxyr olds. xxx accounts for xx. of Beauty purchases.

HOW DO THEY SHOP CONFECTIONERY?

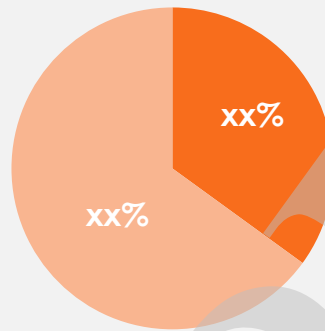
PLANNED Vs. IMPULSE PURCHASE



PLANNED



IMPULSE



Confectionery purchasing is **xxx** with xx% planning to buy, with this increasing amongst xxx citizens (xx%) & more travellers (xx%)

Xxx citizens are **xxx** (xx%), as well as **xxx** travellers (xx%) & **xxx** (xx%) **xxx** purchasers are most **impulsive** (xx%), whilst **xxx** buyers **plan** their purchase (xx%)

LEVEL OF PLANNING



High levels of planning, with **xx%** of buyers already knowing the **brand/exact product** they would buy

Xxx buyers are most likely to have planned the brand/product (xx%) & those who travelled to xxx (xx%)

Xxx buyers are more **open to influence** as they are less likely to have planned the brand/exact product (xx%), this is also similar for xxx (xx%)

REASON FOR PRODUCT SELECTION



1.

xxxxx



2.

xxxxx



3.

xxxxx



4.

xxxxx



5.

xxxxx

Xxx is the most important criteria in Confectionery purchasing, however **xxx** is also really important in influencing shoppers when deciding what product to purchase (xx%)

1 in x buyers were influenced by the product being **xxx** and 1 in x by a **xxx**

Xxx is especially important amongst xxx travellers to **xxx** (xx%)

Xxx buyers prefer **xxx**(xx%)

Xxx are especially important to **xxx** (xx%)



WHAT DO THEY PURCHASE?



AVERAGE TOBACCO SPEND
\$xx

% SPEND vs. CORE CATEGORY SPEND
xx%

BRANDS PURCHASED

Top 5
Tobacco Brands



Data indicates how
sub-groups compare
to the average



	Brand 1	Brand 2	Brand 3	Brand 4	Brand 5
GENDER	xx% xx%	xx% xx%	xx% 1x%	xx% x%	x% x%
AGE <35 V. 35+	xx% xx%	xx% xx%	x% xx%	xx% x%	x% x%
TIER 2 V. 3	xx% xx%	xx% x%	xx% xx%	x% x%	xx% x%
LEISURE V. BUSINESS	xx% xx%	xx% x%	xx% xx%	xx% x%	x% x%

xxx brands dominate the Tobacco category,

Cigarette purchases have a strong bias xxx, with xxx having a significantly greater share than any other brand, especially by males, but are more likely to be purchased if travelling in America, and lowest in Europe

xxx purchases increase to xx% share amongst travellers in Asia and are more likely to be bought by a male shopper

xxx is the only brand showing a difference between xxx and xxx, and xxx differs for attracting more female buyers



Counter Intelligence Retail

The Pallion,

Whinchat,

Skipwith Road,

Escrick,

YORK,

YO19 6EJ

United Kingdom

TEL: +44 (0) 8459 013641

E-mail: enquiries@counterintelligenceretail.com

Website: www.counterintelligenceretail.com

