

## What We Do

Commercial strategy development and retail masterplanning\*

Passenger/customer behaviour and requirements research

Investment due diligence/bid preparation

Trading and performance analysis

Product and merchandise mix evaluation/strategy

Concept development and testing

Market and positioning evaluation

Brand and marketing evaluation and strategy

Interior and common area design\*

Space supportable modelling

Commercial area financial and rental level forecasting

Passenger satisfaction studies

## Strategies for Success in Travel Retailing

Unique combination of passenger insight, forecasting, planning and creativity

Expert understanding of the travel retail environment

20 years airport/travel retail experience

Worked with over 60 airports worldwide\*

Extensive experience of the wider (high street) retail environment

Rigorous analysis to deliver implementable and effective commercial strategies

Unrivalled passenger behaviour insight – over 100,000 passenger interviews worldwide

"Pragma handled our retail expansion project with the utmost professionalism, making this development an exciting and successful one for our airport. The final outcome was very positively received by our concessionaires and will enhance the airport experience for all our passengers."

*Julian Jaeger, Chief Executive Officer  
Malta International Airport*

\*projects undertaken in partnership with specialist planning and design company The Design Solution

## Global Experience

Clients in over 40 countries, including:

### Airports

Abu Dhabi  
Belfast International  
Berlin Brandenburg  
Birmingham  
Bourgas and Varna  
Bristol  
Budapest  
Delhi  
Doha  
Dusseldorf  
Hamburg  
Istanbul  
Kuala Lumpur  
London Luton  
Madrid  
Malta  
Mumbai  
Muscat  
Nassau  
Nice  
Rome Fiumicino  
Toulouse  
Zurich in Klein

### Travel and Tourism

#### Venues/Operators

Autogrill (pan-Europe)  
Deli & Keleti Stations (Hungary)  
First Choice  
Hamburg Hauptbahnhof  
Historic Royal Palaces  
Network Rail  
P&O Cruises  
The London Eye  
The Tussauds Group  
Thomson  
Zurich Airport landside

### Travel Retail/Airlines

Alpha Retail  
British Airways  
Disney Travel Goods  
First Choice Airways  
Hamleys  
Nuance  
William Grant & Sons  
World Duty Free (investment advice)

### Retailers

Accessorize  
Arcadia Group  
A/Wear  
Claire's Accessories  
Cotswold Outdoor  
Crew Clothing  
East  
EAT  
Ede & Ravenscroft  
Faith  
Fat Face  
Fiorelli  
Gerard Darel  
Inchcape (global)  
Jack Wills  
Jane Norman  
L.K. Bennett  
Monsoon  
Morgan  
Pret-a-Manger  
Radley  
Ramstore (Russia)  
Starbucks  
Stroy Depo (Russia)  
Tampopo  
Vodafone (Egypt/Romania)  
White Stuff

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# Successful Strategies in Airports and Travel Retailing



P R A G M A  
strategy | implementation | results



## Alpha Retail

### Task

Support Alpha Retail in understanding customers across the UK Business.

### What we did

- Store exit surveys in Manchester, Birmingham and Newcastle Airports
- Concept development testing to support Alpha's bid to retain the tax/duty free contract at Birmingham International Airport

### Result

Our work enabled Alpha to continually improve the targeting of merchandise, promotions and advertising to their customer base.

Furthermore, the concept testing work at Birmingham fed into the design direction for the proposed stores which enabled Alpha to remain as the tax/duty free concessionaire.

## Network Rail

### Task

Ongoing customer satisfaction tracking across 18 major rail stations in the UK.

### What we did

Regular customer satisfaction tracking surveys on key performance indicators, which has included catchment analysis, revenue modelling and merchandise mix analysis.

We are still undertaking this work for Network Rail, having begun the relationship in 1996.

### Result

The result has been a considerable improvement to customer satisfaction. An enhanced understanding of areas that required the most attention has allowed targeted improvements in the customer experience to take place. Our work has also helped to develop the letting strategy for the major stations. There has been a considerable uplift in commercial performance, with stations increasingly recognised as offering enhanced quality and value in both shopping and catering.



## Delhi International Airport\*

### Task

To provide the complete commercial space planning strategy for the new Delhi International Airport.

### What we did

- Passenger segmentation and flow analysis
- Space supportable and financial forecasting
- Detailed commercial space planning and merchandise mix

### Result

In February 2009 the new airport was officially launched to 350 potential concessionaires. The retail plan incorporated into the final architectural solution signed off by airport management and presented to retailers was exactly as we had proposed. Our financial forecasts have been incorporated into the airport business plan.

**“Their unique combination of skills has assisted us in the selection of the best commercial design and enabled us to present this to the wider airport team in a clear and concise way.”**

*Dr Norbert Minhorst, Commercial Director  
Berlin Airports*

**“... absolutely brilliant insight which will be critical for future marketing, operational and buying plans.”**

*Vicky Owen, Marketing Director  
Cotswold Outdoors*

## Berlin Brandenburg Airport\*

### Task

To design the commercial planning for all areas of the new capital city airport.

### What we did

- Passenger segmentation and flow analysis
- Space supportable and financial forecasting
- Detailed commercial space planning and merchandise mix
- Presented our work to investors

### Result

Our work led to a substantial and fundamental change to the design of the retail areas at the airport. All areas of the retailing space will be visible and accessible to all passengers, with the opportunity to create differentiated retail areas.

Berlin Brandenburg Airport is due to open at the end of 2011, and will incorporate our recommended retail plan.

