

# PULSE *Global Survey*

Pulse is a bi-annual survey of 1,500 respondents across UK, US, GCC, China and India

## Travel



## *Key Findings and Insights*

P R A G M A + B E N O Y



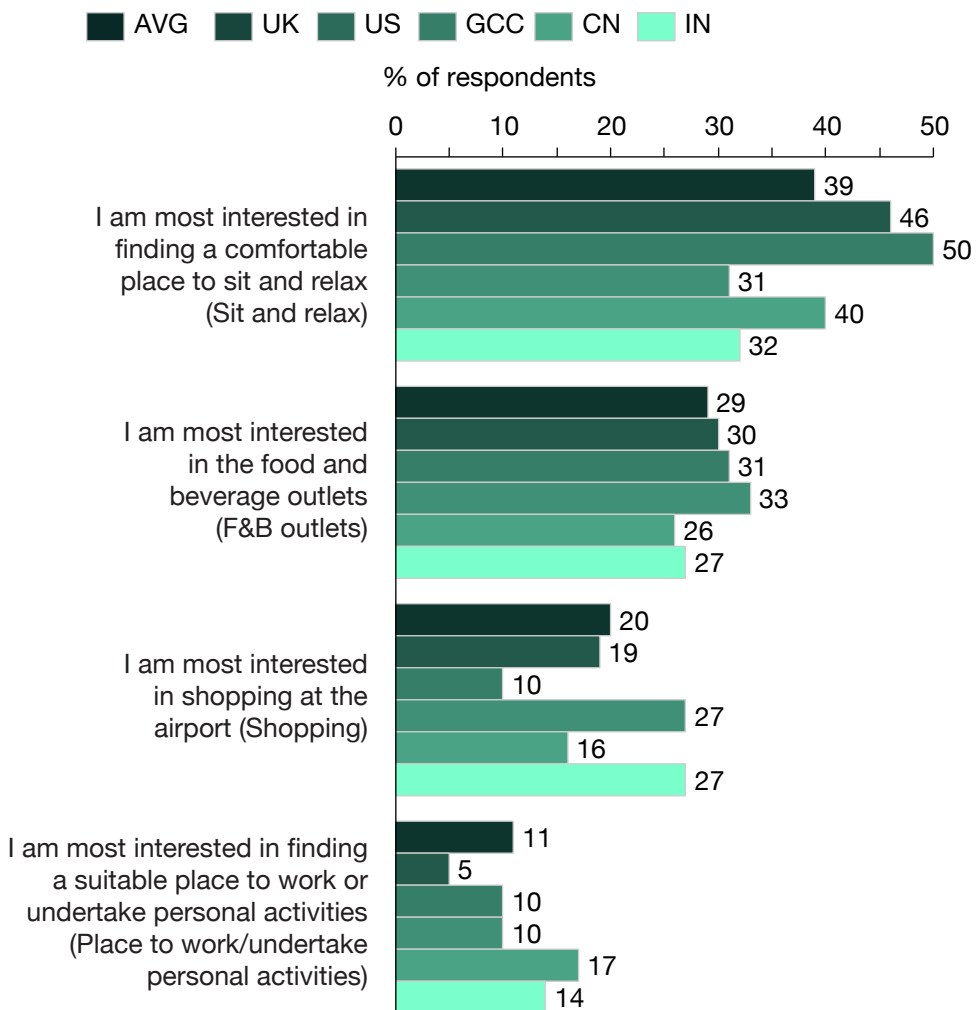
## **Behaviour Prior to Boarding the Plane**

*Question: What type of behaviour is most important to you when in the departure lounge, prior to boarding?*



The highest proportion of respondents globally choose to sit and relax prior to boarding a plane, especially older consumers aged 55+ and those from the US and UK. GCC and Indian respondents are more likely to be interested in shopping.

**Behaviour Prior to Boarding the Plane** *Base: All respondents (1500), Single Choice*



**Key Insights**

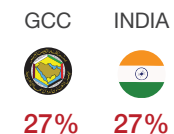
**39%**

The highest proportion of respondents globally chose to sit and relax prior to plane boarding

Especially For:



Over-indexed...

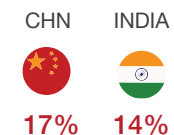


...on shopping prior to boarding while US respondents have the lowest proportion of choosing to shop

Lowest



Over-indexed...



...on finding places to work/ undertake personal activities

Lowest





## **Shopping in the Airport**

*Question: Thinking about purchasing products in airports, to what extent do you agree with the following statements?*

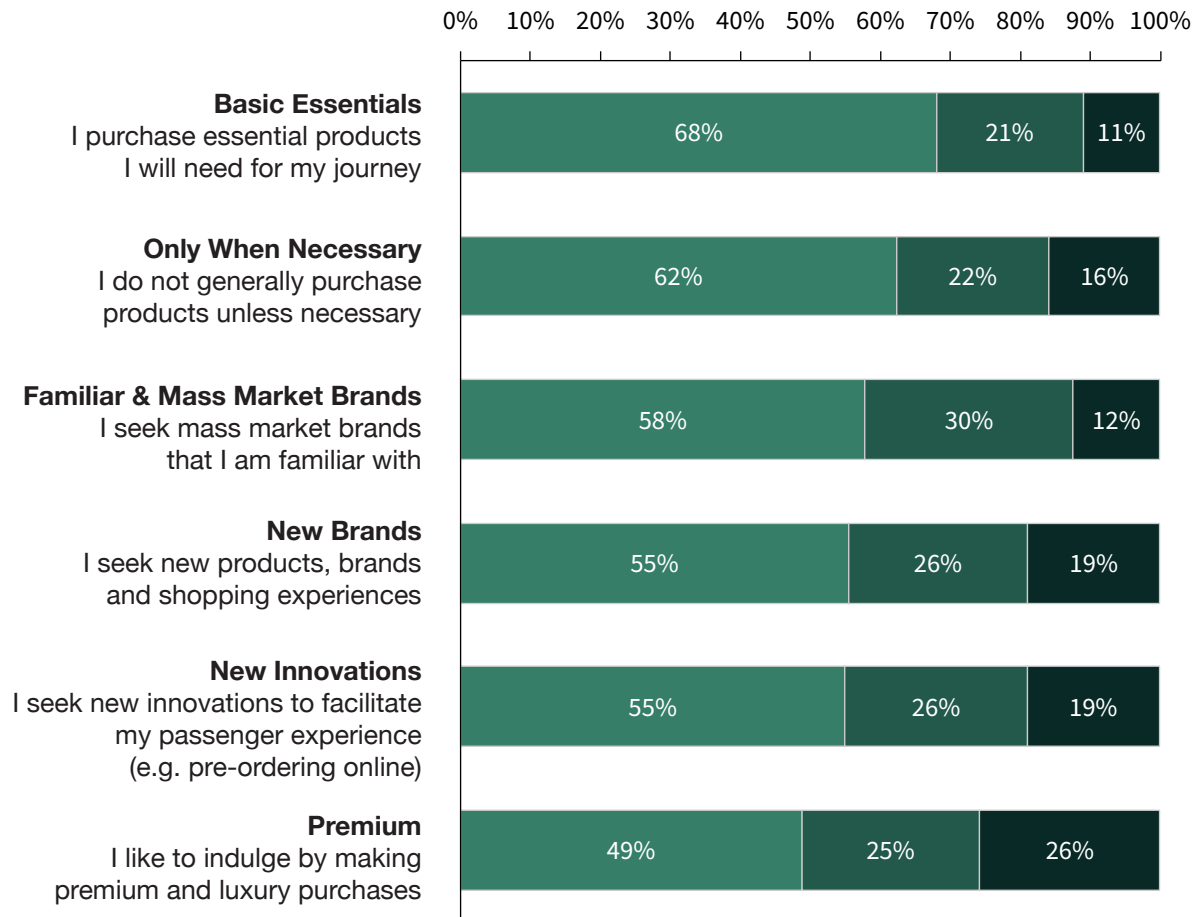


When purchasing in airports, a majority **68%** of respondents shop for basic essentials during their journey while **49%** of respondents like to indulge by buying premium items.

**Shopping in the Airport**

Base: All respondents (1404)

Agree Neutral Disagree



**Key Insights**

A higher proportion of UK & US respondents only shop when necessary compared to other regions



China has the highest percentage of respondents who seek new innovations to facilitate their passenger experiences



GCC, China and India over-index in agreeing that they indulge themselves by making premium purchases





## **Airport Online: Pre-Order or Click & Collect**

*Question: If an airport offers a pre-order online or click-and-collect service, would you consider using the service for the following categories?*



Two-thirds of respondents, globally, claim they would consider online services in airports. 71% of willing respondents would use these services for duty-free shopping, 65% for F&B, and 63% for retail stores. On average a lower proportion of respondents from the UK and US and willing to use online services overall.

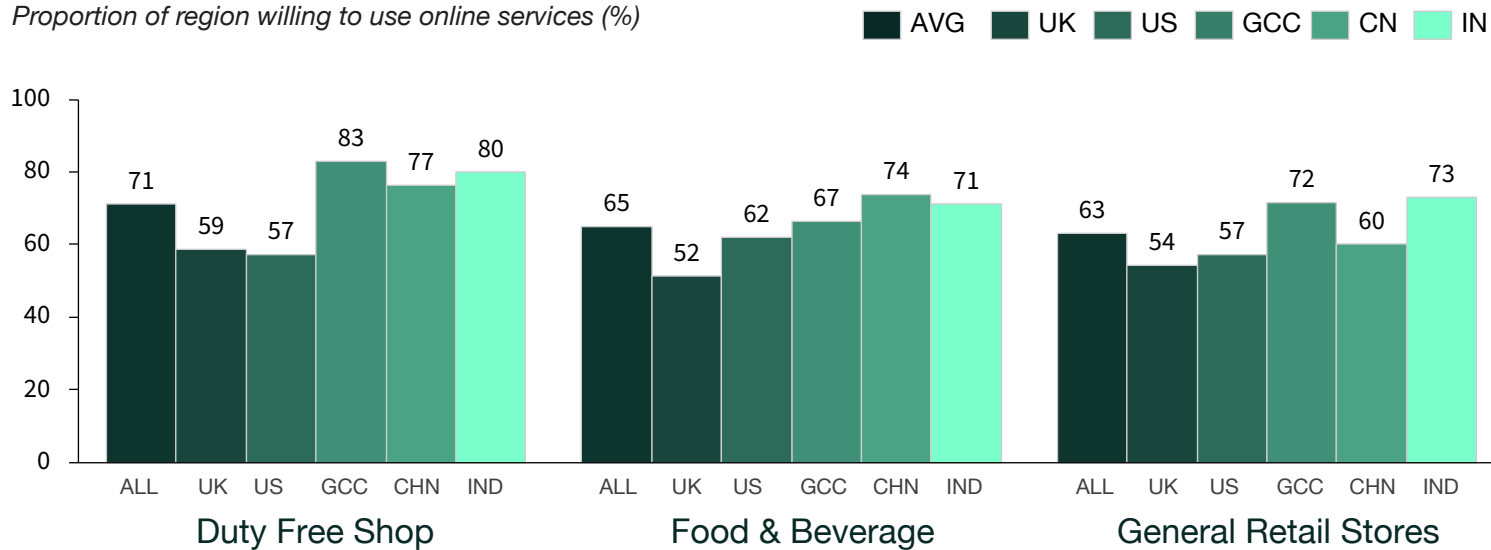
**Future Airport Online Pre-Order or Click & Collect Service**

Base: All respondents (1500)



**Airport Online Pre-Order or Click & Collect Service by Region**

Proportion of region willing to use online services (%)



**Key Insights**

Smaller proportion of respondents from the **UK** and **US** are willing to use **online services** for all three categories compared to the **GCC, China and India**



Unlike the global trend, **more US** respondents are willing to use **online services for F&B (62%)** than **duty-free (57%)** and **general retail stores (57%)**





## **Motivation for Further Purchases at an Airport**

*Question: When visiting an airport, which factors would enhance your overall experience and motivate you to purchase more products and services?*

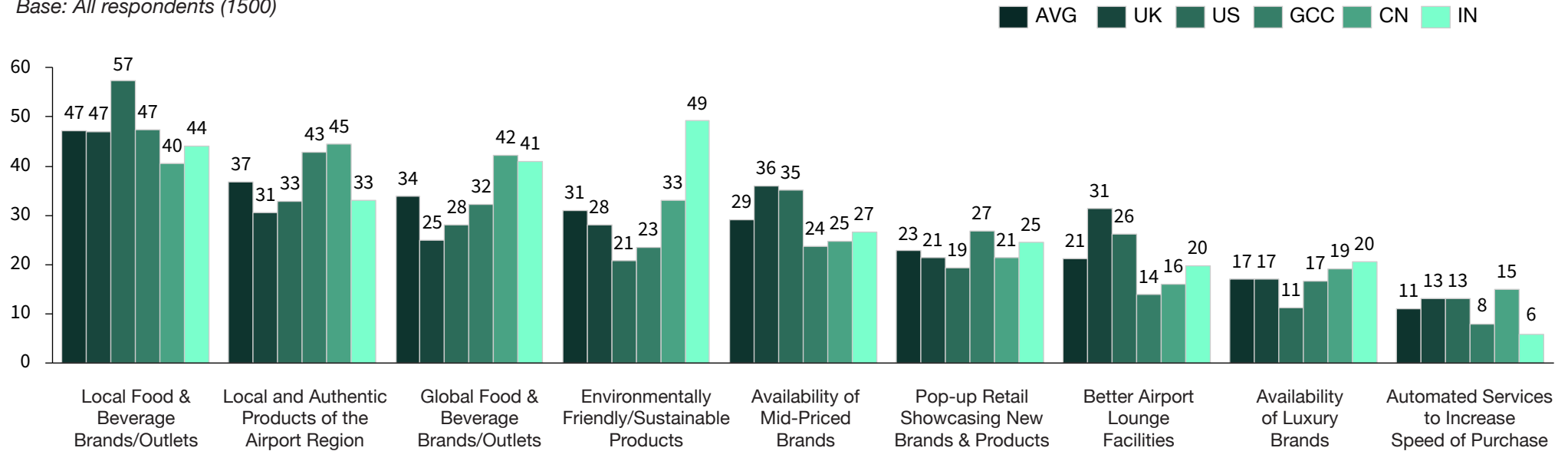




Globally, local and authentic F&B and retail are the most popular concepts to enhance airport experience and motivate purchases, while there is least interest in automated services. Respondents from India over-index on sustainable products, those from China over-index on authentic products

### Motivation for Further Purchases at an Airport

Base: All respondents (1500)



#### Key Insights

For respondents from the UK, local F&B brands/outlets (47%) is the most common choice. UK respondents over-index on availability of mid-priced brands and better lounge facilities

Respondents from the US showed similar preference as the UK with having the highest percentage in recognising that local F&B brands would enhance their experiences and motivate purchases

Unlike the global trend, respondents from China claim that authentic products (45%) are helpful to enhancing the airport experience and motivate purchases the most followed by global F&B options (42%)

Unlike the global trend, India has the highest proportion of respondents who view sustainable products as helpful to the enhancement of the airport experience

# PULSE

## Global Survey



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## PRAGMA

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