

**JCDecaux**

*showcasing the world*



# GLOBAL SHOPPER CONNECTION

- cosmetics & high-end fragrances -

May 2013



1

GLOBAL SHOPPER CONNECTION,  
international clients under scrutiny

2

Planned or impulse purchasing:  
unique buying habits

3

Key connection points to reach the  
Global Shopper

4

A dedicated media planning method,  
the « CONNECTION PLANNING »

5

Focus on Chinese, Russian, Brazilian and  
American Global Shoppers



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**A new international study**, building on previous learning.



**How do Global Shoppers associate travelling and purchase experiences during their trips abroad.**

**Rise of a new international consumer category,**  
particularly appealing to renowned international brands

- **Significant purchasing power**
- **Higher than average consumption level**
- **Unique buying habits**





Understand better the **Global Shopper** through **3 dimensions**:



Profiles and purchase habits while travelling

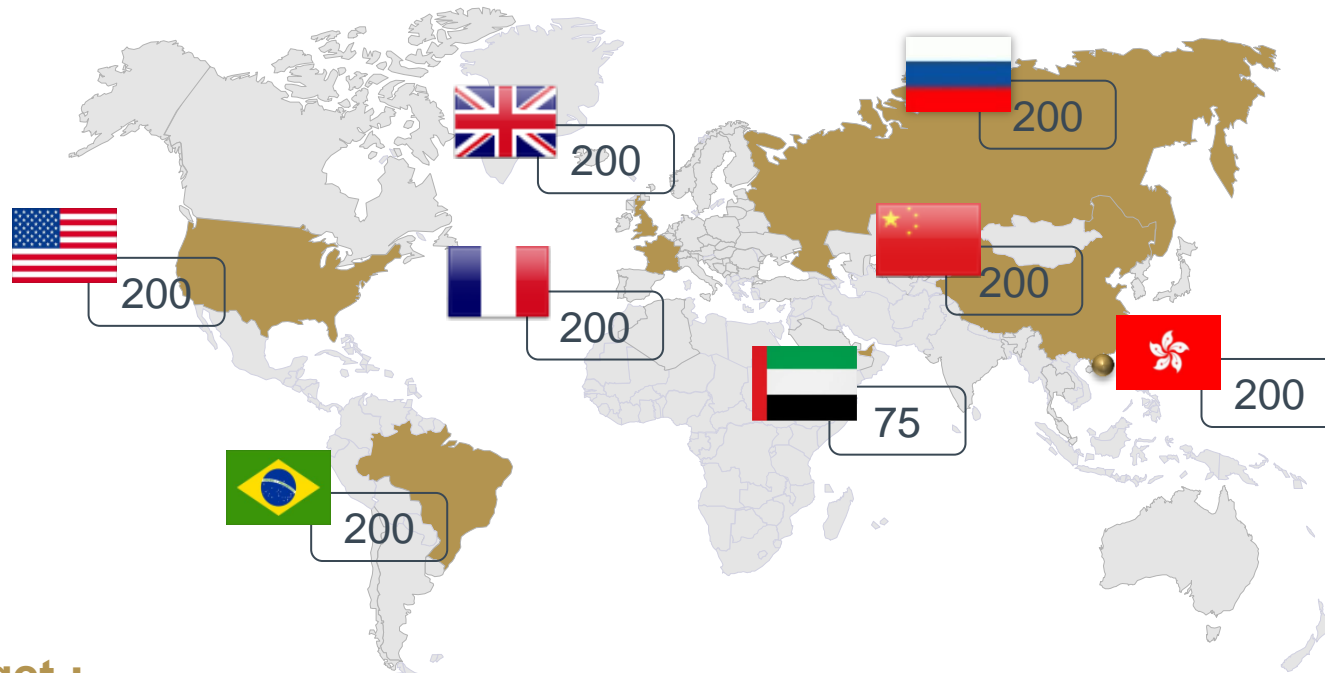


Frequency of media usage and exposure to advertising





Favourite destinations and key connection points with brands

Interview of **1,475** Global Shoppers from **8 countries**  
 (populations that registered highest spending levels while travelling)



**Target :**

- International Travellers 
- Highest Earners 
- Regular consumption of high-end cosmetics and fragrances 
- Balanced distribution of men and women 

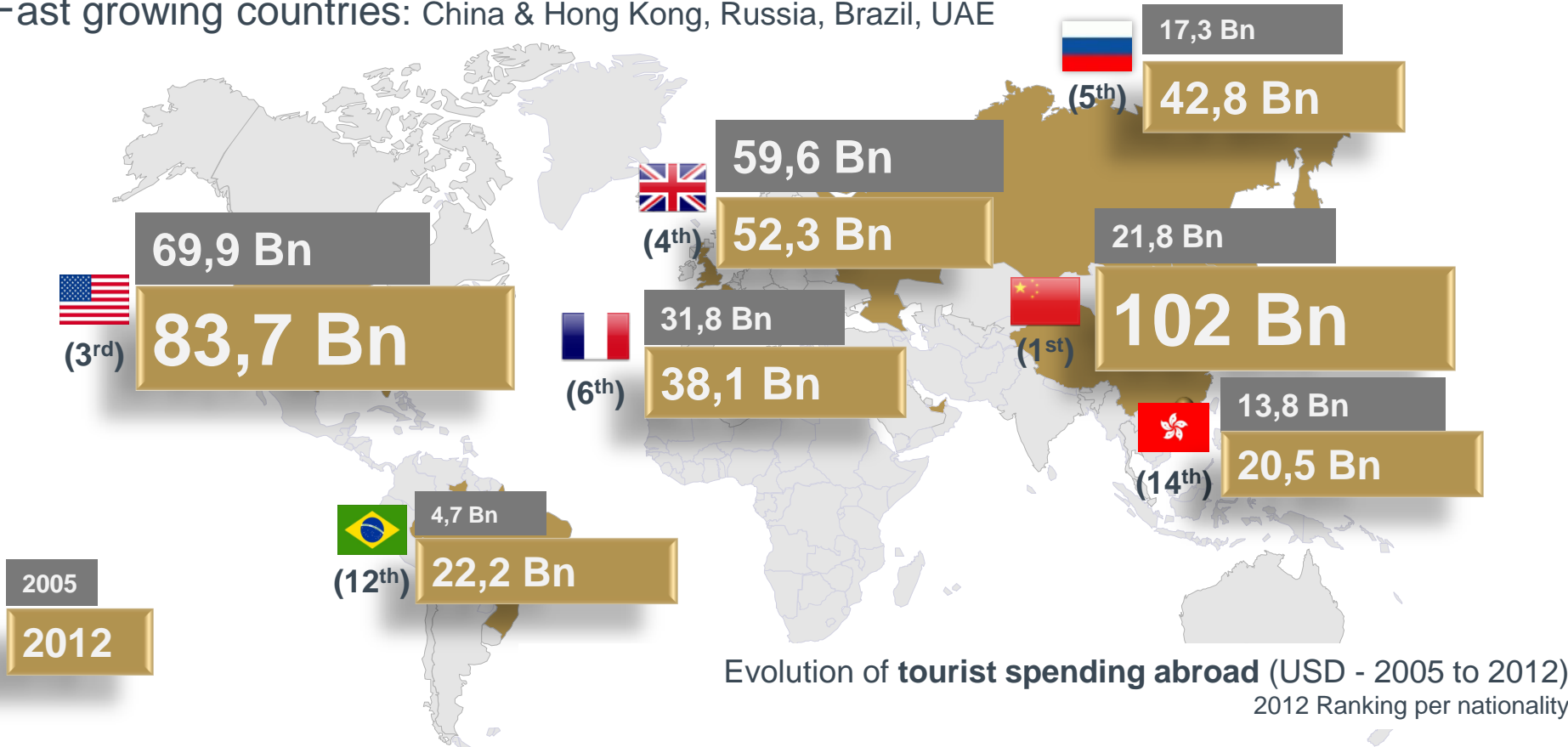
**Quantitative** online **questionnaire** (undertaken during the 1<sup>st</sup> quarter of 2013)

# A POPULATION THAT SPENDS MORE AND MORE

The studied countries are part of the **top 15 worldwide** in terms of **tourism spending**

Mature countries: USA, UK, France

Fast growing countries: China & Hong Kong, Russia, Brazil, UAE

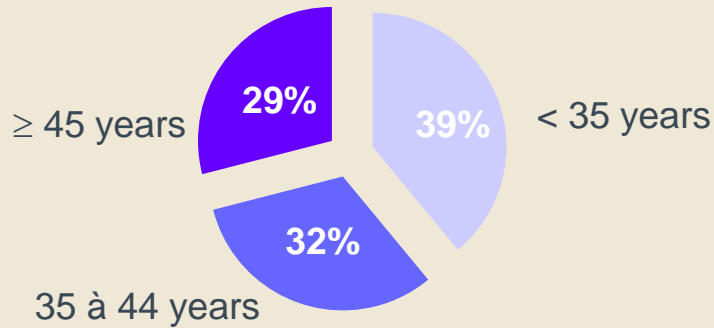


Evolution of **tourist spending abroad** (USD - 2005 to 2012)  
2012 Ranking per nationality

Source: World Tourism Organization, April 2013, in USD



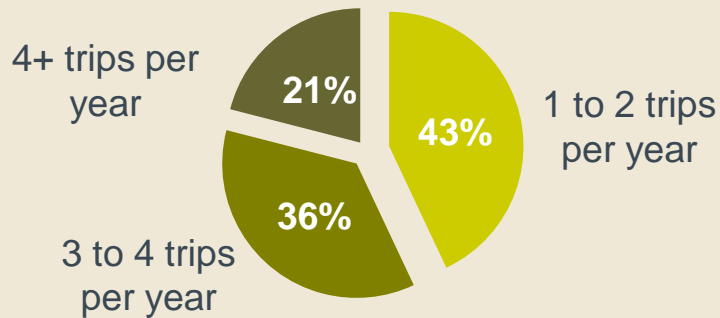
**Balanced in age**



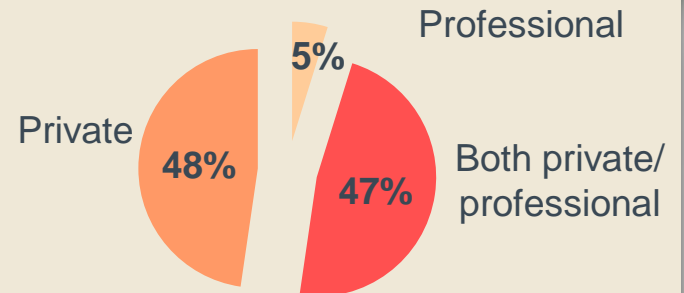
**Regularly purchase high-end cosmetics and fragrances**

Purchase every 2/3 months or more

**Regular travellers...**



**... for private purposes or both private /professional**





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# THE GLOBAL SHOPPER, A STRATEGIC TARGET

Who is the **GLOBAL SHOPPER** ?

An **INTERNATIONAL**  
traveller...

... who clearly associates  
**TRAVELLING** with **SHOPPING**



# SHOPPING IS AN INTEGRAL PART OF THE GLOBAL SHOPPER'S TRAVEL EXPERIENCE

**96%** Like to do some **shopping** when **visiting** a foreign city

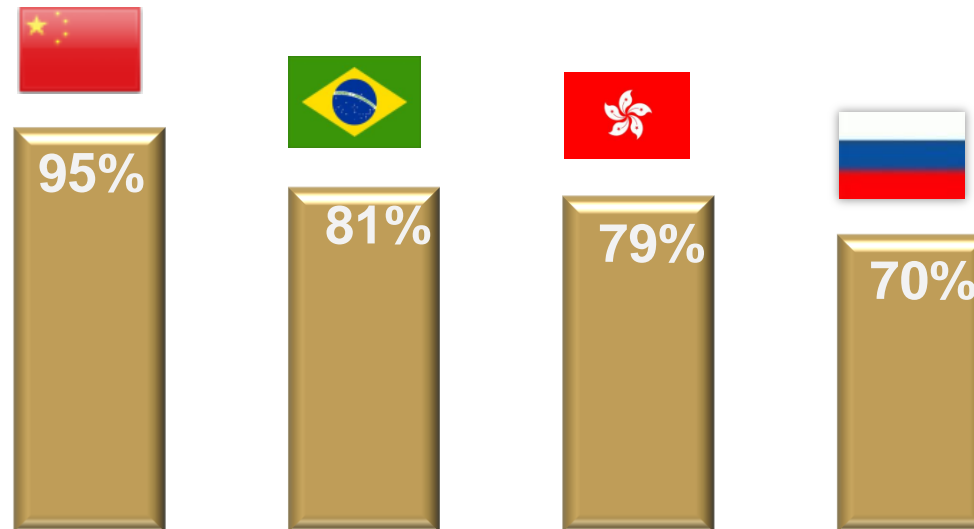
**83%** Consider shopping as an **important part** of their trips



# SHOPPING IS AN INTEGRAL PART OF THE GLOBAL SHOPPER'S TRAVEL EXPERIENCE

68%

Even **choose their travel destination** according to shopping opportunities and available brands in the location





A large **diversity of products** are bought, with **fashion** and **clothing** as the dominant category, followed by **cosmetics & high-end fragrances** and **accessories**



**Varied preferences** according to **country**: top categories are ....



Delicatessen	<b>95%</b>
Fashion	<b>91%</b>
Accessories	<b>89%</b>



Cosmetics & fragrances	<b>93%</b>
Accessories	<b>86%</b>
Fashion	<b>85%</b>



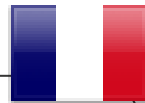
Cosmetics & fragrances	<b>93%</b>
Fashion	<b>90%</b>
Accessories	<b>89%</b>



Alcohols	<b>88%</b>
Cosmetics & fragrances	<b>87%</b>
Accessories	<b>85%</b>



Fashion	<b>88%</b>
Accessoires	<b>72%</b>
Cosmetics & fragrances	<b>69%</b>



Fashion	<b>82%</b>
Cosmetics & fragrances	<b>74%</b>
Delicatessen	<b>71%</b>



Fashion	<b>82%</b>
Cultural products	<b>74%</b>
Leather goods	<b>72%</b>



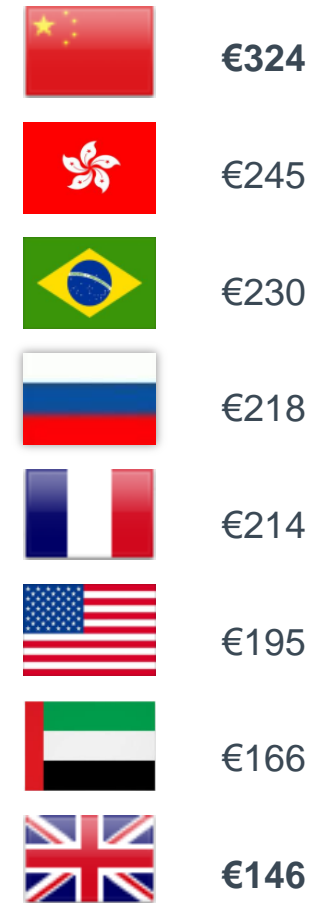
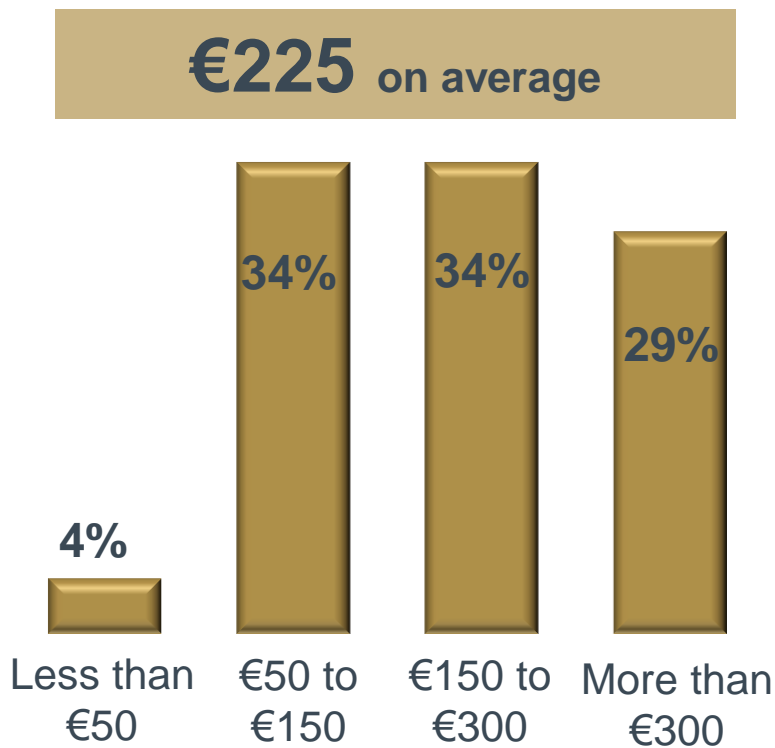
Fashion	<b>81%</b>
Cosmetics & fragrances	<b>79%</b>
Alcohols	<b>74%</b>

The **Global Shopper's** buying habits  
- Focus on **cosmetics & high-end fragrances** -



# SPENDING ON COSMETICS AND HIGH-END FRAGRANCES

Spending is **225 euros** on average, although showing great **variation** among **countries**.





A mix of **personal** and **non-personal** purchases

When you buy high end cosmetics & fragrances while travelling abroad, is it...

Personal purchases

86%

Gifts for family/friends

79%

Requests

31%





# A MIX OF PLANNED AND IMPULSE PURCHASE

A **planned** purchase share...

**31%** **know exactly** which products or brands they want and **stick to it.**

... allowing substantial room for **impulse** buying

**53%** have specific products or brands in mind, but sometimes **change their mind** and choose something else once in the shop.



# PREFERRED BRANDS WHEN SHOPPING ABROAD

A balanced mix of available and unavailable brands in the country of origin.

**50%** Buy brands they know well but **cannot find** in their own country

**49%** Buy brands they know well and **can find** in their own country as well



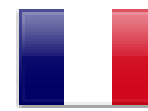
**64%**



**58%**



**56%**



**73%**



**63%**



**61%**

Why would Global Shoppers buy abroad, brands that they can find in their own country ?

**Better prices** and **hedonist desires** are the two key drivers

**70%** Buy products because they are **less expensive** abroad

**89%** 

**42%** want to **indulge** themselves during their travel

**37%** *Fast growing countries*



Want **a souvenir** of their travel



Studying high-end cosmetics and fragrance **buying habits** leads us to address the necessity to reach Global Shoppers at **different connection points**: both in their **country of origin** and during their **travels**.







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# Triggering the Global Shoppers' act of purchase

What are the **strategic connection points**?



## DIVERSE SHOPPING PLACES

Airports Duty-Free shops **75%**

Department stores **70%**

Luxury brands' stores **62%**

Down-town perfumeries **55%**



# DIVERSE SHOPPING PLACES

Reasons for buying in these types of shops

**Airports Duty-Free shops** **75%**

**Department stores** **70%**

**Luxury brands' stores** **62%**

**Down-town perfumeries** **55%**

**Less expensive** **1** **78%**

**More convenient** **2** **77%**

**Wider choice** **3** **58%**

**Better services**

**Great shopping experience**



# DIVERSE SHOPPING PLACES

Reasons for buying in these types of shops

Airports Duty-Free shops 75%

Department stores 70%

Luxury brands' stores 62%

Down-town perfumeries 55%

Less expensive

More convenient 2 58%

Wider choice 1 82%

Better services

Great shopping experience 3 50%

# DIVERSE SHOPPING PLACES

Reasons for buying in these types of shops



Less expensive

More convenient

Wider choice

2 71%

Better services

1 73%

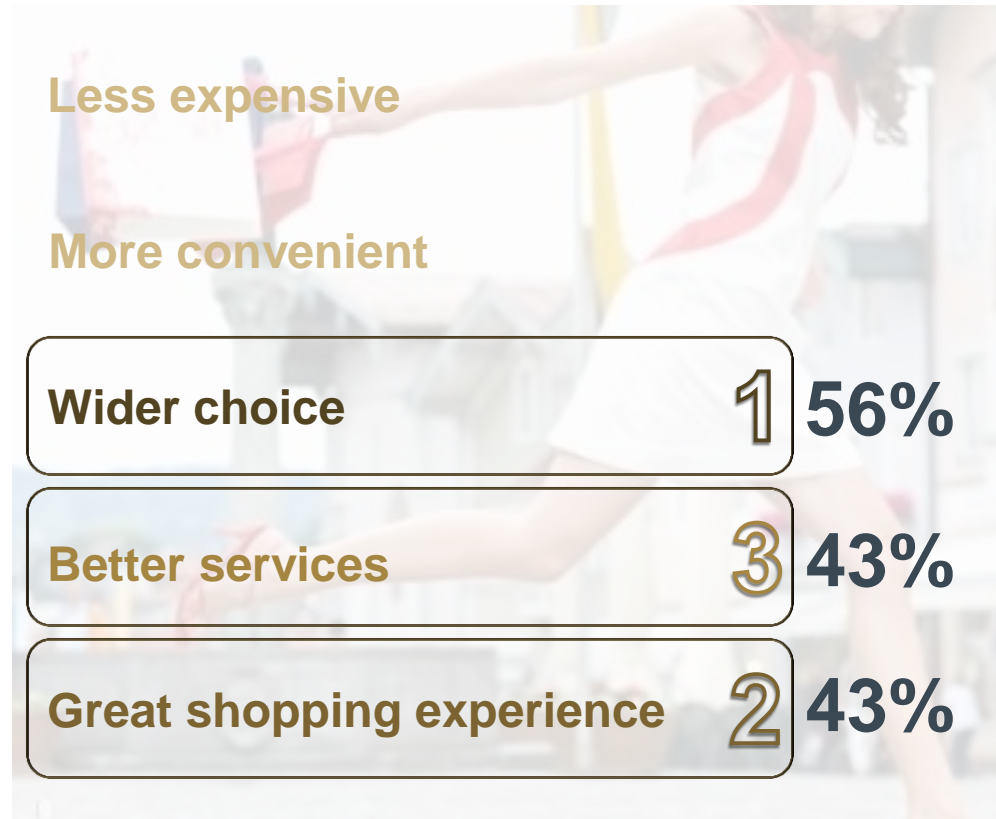
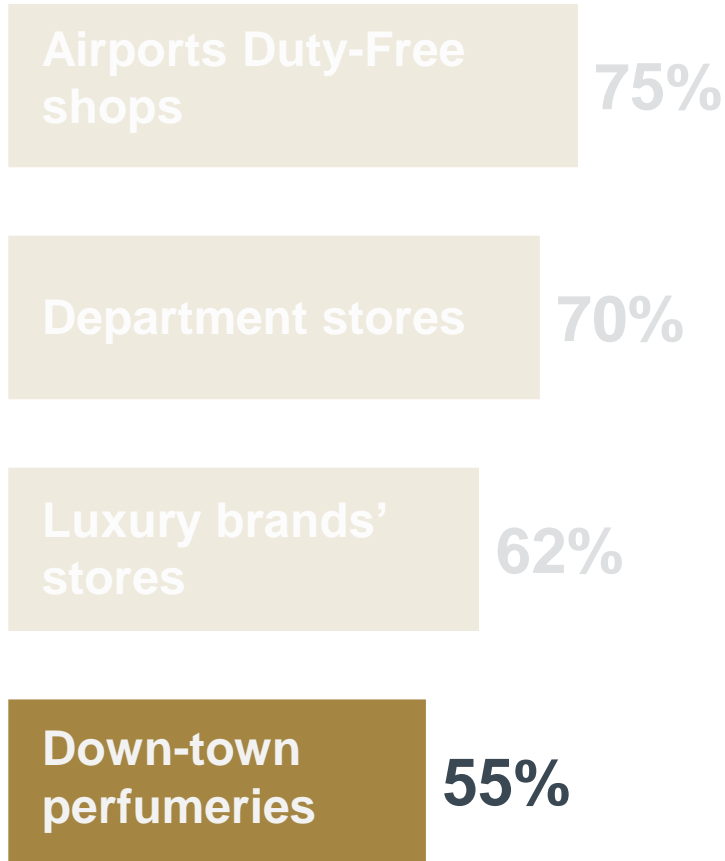
Great shopping experience

3 69%



# DIVERSE SHOPPING PLACES

Reasons for buying in these types of shops



# SHOPPING AREAS VITAL CHANNEL FOR GLOBAL SHOPPERS

**94%** enjoy walking around **shopping areas**

**94%** enjoy walking around the **different neighbourhoods**

**89%** visit mostly the **main monuments**



*When you visit a large city abroad, how do you travel?*

**96%** by **foot**

**95%** **taxi**

**90%** with **public transports**

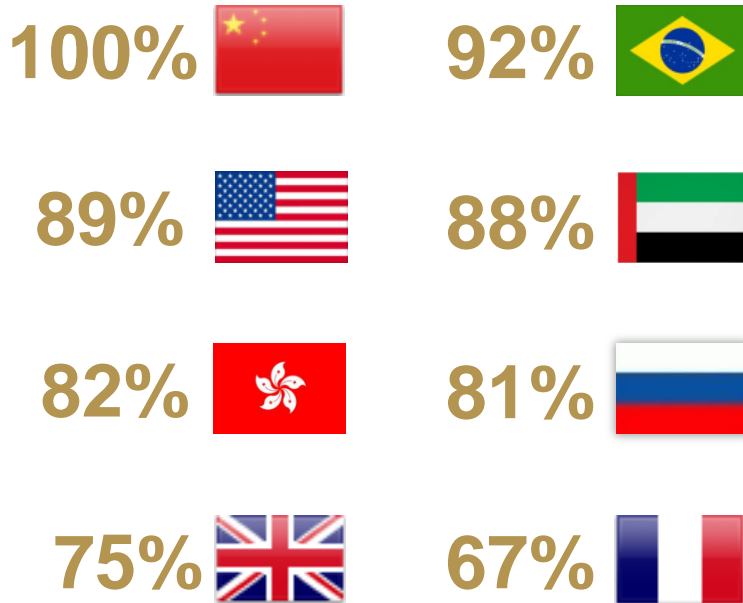
**80%** **rental car**

**80%** **city tour bus**

**74%** **coach**



**84%** Pay attention to advertising when they are abroad





**87%** Looking at advertising helps them understand the local culture when travelling abroad

97%



97%



92%



91%





# HIGH ATTENTION PAID TO ADVERTISING

69%

seeing the same ads as those present in their country helps them feel at ease and less disoriented

78%

*Fast growing countries*

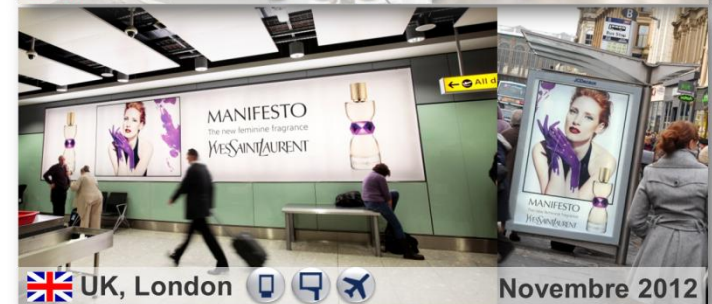


63%

appreciate it when ads are similar to the ones in their own country

72%

*Fast growing countries*



# SIGNIFICANT EXPOSURE AND AWARENESS TOWARDS OOH COMMUNICATION

**Out-Of-Home advertising** combines **visual impact** and **affinity** when targeting a **highly mobile** audience.

« *When abroad, I pay attention to ...* »

**95%** Roadside advertising

Of which **49%** claim  
« **yes, definitely** »

**92%** Airport advertising

Of which **43%** claim  
« **yes, definitely** »





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For the Global Shopper, **travelling** is a **seamless experience...**



...that takes the form of  
**discovery**,  
**emotion** and  
**impulse**



For the Global Shopper, **travelling** is a **seamless experience...**



...brands that **accompany** the Global Shoppers throughout their journey will become an **integral part of their experience**

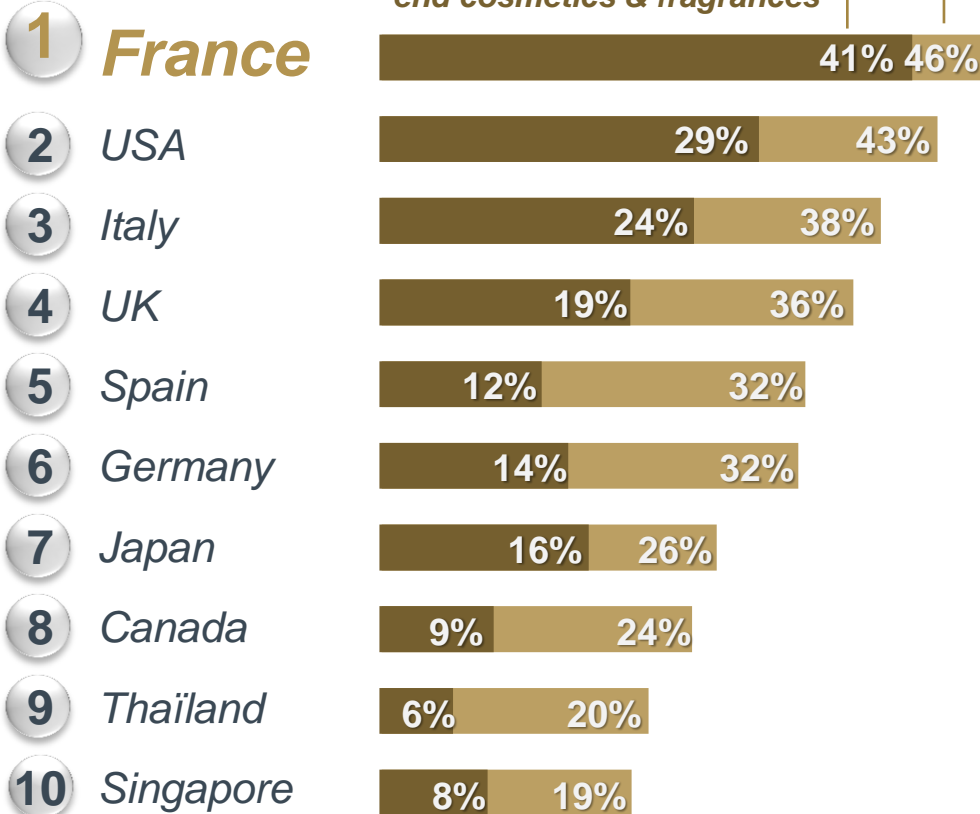


# What are the **Connection Points** of Global Shoppers ?



Visited countries

Country of purchase for high end cosmetics & fragrances





*Hong Kong*  
*USA*  
*France*



*China*  
*Japan*  
*UK*



*UK*  
*Oman*  
*France*



*USA*  
*France*  
*Italy*



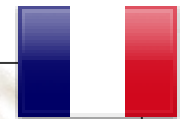
*France*  
*Egypt*  
*Italy*



*France*  
*Spain*  
*USA*



*France*  
*UK*  
*Canada*

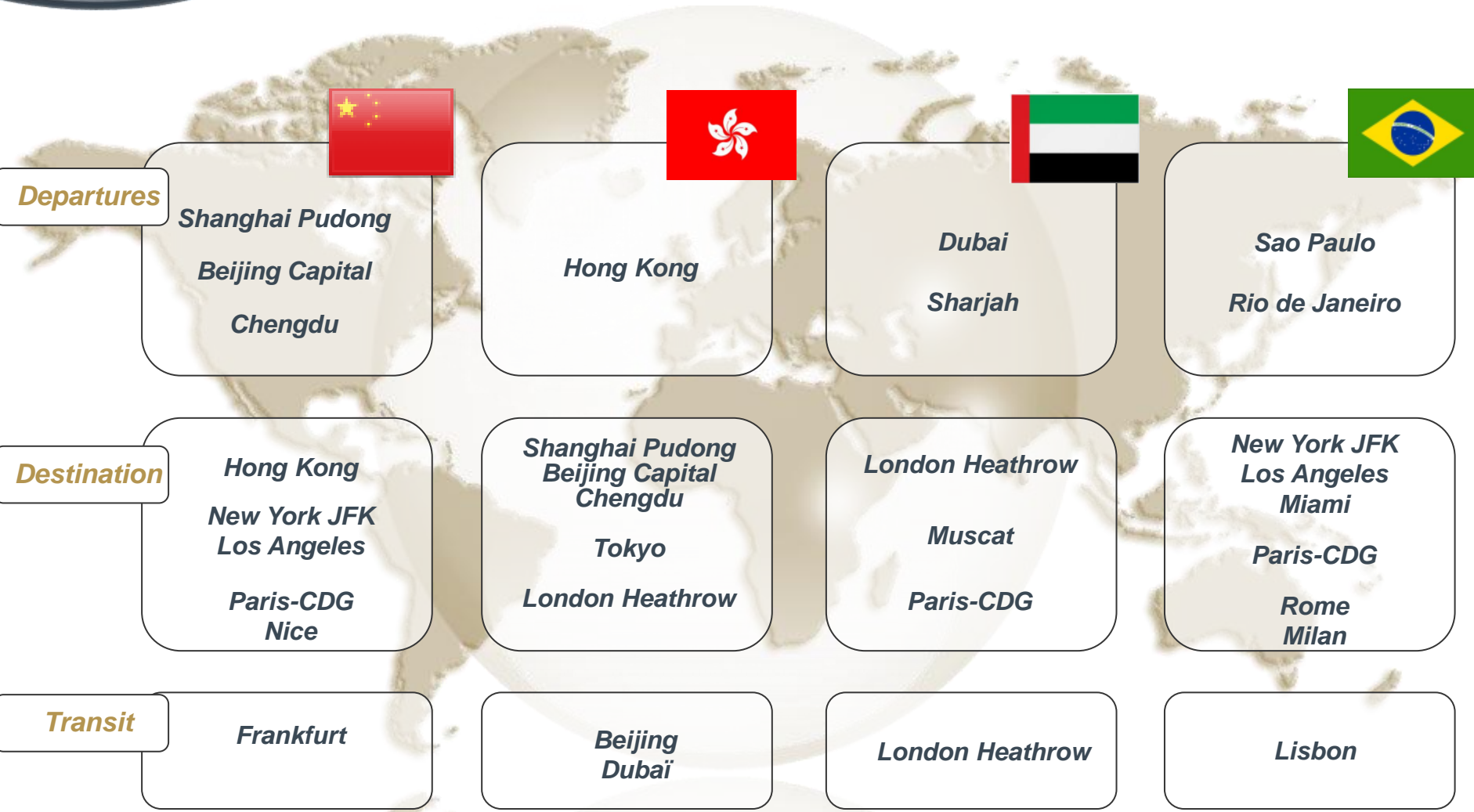


*UK*  
*Spain*  
*Italy*

- 1 > **Identify key Connection Points**  
for each nationality  
*Departures / Destinations / Transit*











JCDecaux's Airport Presence





JCDecaux - other Presence







JCDecaux's Airport Presence







JCDecaux - other Presence



## 1 > Identify key Connection Points for each nationality

*Departures / Destinations / Transit*

→ **Diversify** the range of countries and advertised airports to ensure the **coverage of all the connection points**



- 1 › Identify key Connection Points for each nationality
- 2 › **Ensure visibility** in the main destination **cities**
  - › *On a range of strategic locations held on a long-term basis, or through a thought-out use of national campaigns*





› **Strategic locations** held on a long-term basis

*For instance in London*



*Both on the access road and in the immediate vicinity of the Westfield Shopping Centre*



› **Strategic locations** held **on a long-term basis**

*For instance in London*



*Within Tottenham Court Road and in its immediate vicinity*

- 1 > Identify key Connection Points for each nationality
- 2 > Ensure visibility in the main destination cities
- 3 > **Animate** the key events
  - > *Per nationality*
  - > *Per destination*



### 3 › Animate the key events

#### › *Per nationality*

For example, for the Middle Eastern Global Shoppers

#### › Summer

#### › The days prior to and following the Ramadan



#### › *Per destination*

For example, the **Fashion Week** in Paris, Milan, London & New York





JCDecaux **orchestrates the meeting** of brands and Global Shoppers through all stages of their journey, by proposing high quality contact points that ensure:

- › **Highly conspicuous** presence
- › A **seamless media immersion**, to accompany the shopping experience





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# Focus on Chinese Global Shoppers

## METHODOLOGY

**200 Chinese travellers** interviewed online during the 1<sup>st</sup> quarter of 2013. The questionnaire targeted a well-balanced sample of men and women air passengers, earning top revenues and regularly consuming high-end cosmetics and fragrances while travelling.



# Chinese Global Shopper ID CARD



- **Well above average** purchasing of all product categories available in the Duty Free Shops



- Very high **awareness of airport advertising** **99%** Pay attention to airports advertising

High-end cosmetics & fragrances

- Avid shoppers - make both **planned** and **impulse** purchases
- They look for a great shopping “experience”
- They buy brands in their **country of origin** to have as a **souvenir** of their travels
- Highest average **spending**
- Top shopping destinations\*



Don't know exactly which product/brands to buy

**6/10**

Justify their preference for duty free shops in this way

**€324**

Per trip  
Vs. €225 for other nationalities



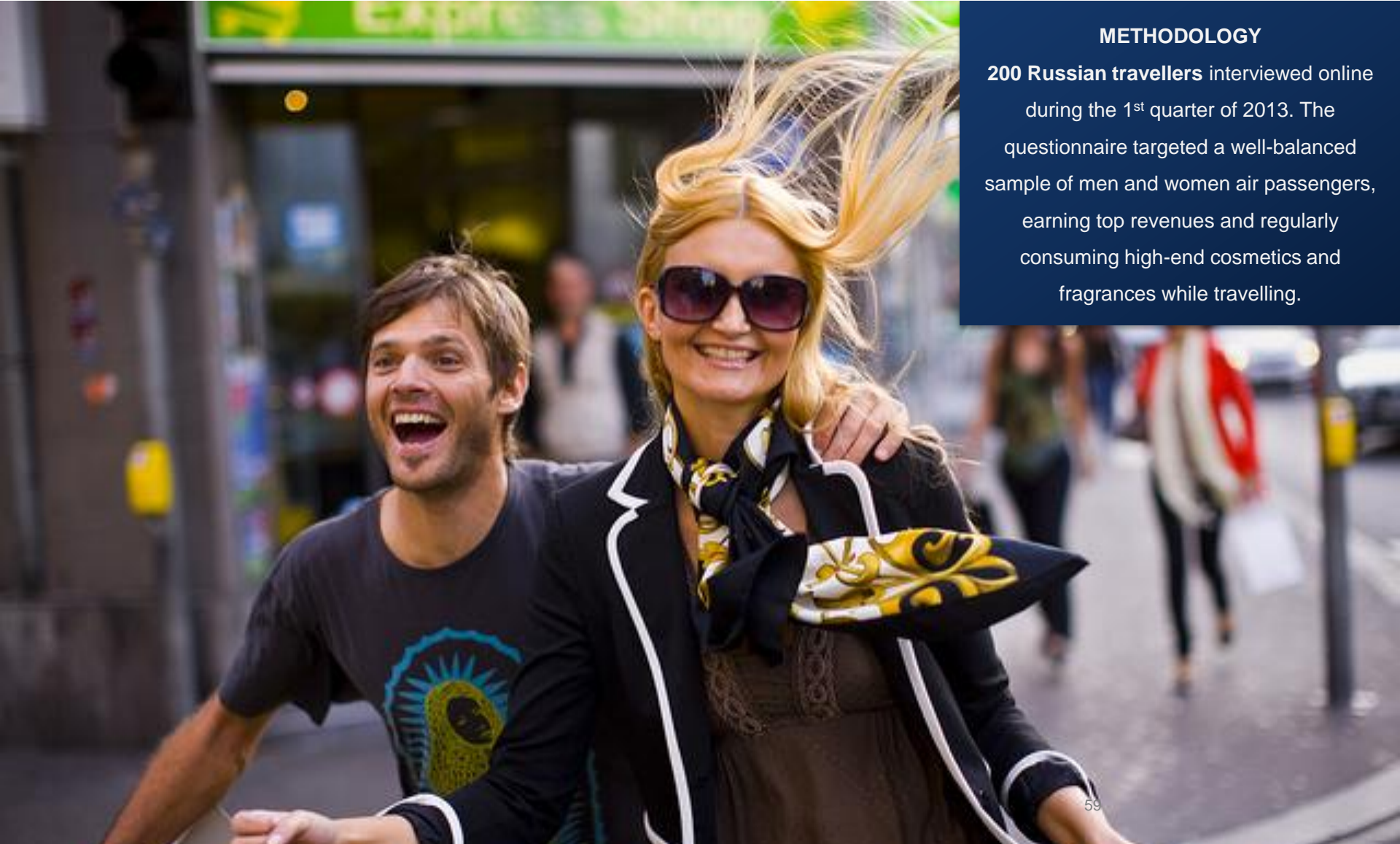
\*Excluding Hong Kong



# Focus on Russian Global Shoppers

## METHODOLOGY

**200 Russian travellers** interviewed online during the 1<sup>st</sup> quarter of 2013. The questionnaire targeted a well-balanced sample of men and women air passengers, earning top revenues and regularly consuming high-end cosmetics and fragrances while travelling.





# Russian Global Shopper ID CARD

- Above average purchasing of specific products



- High ad awareness

**88%** Pay attention to airports advertising

## High-end cosmetics & fragrances

- **Impulse** purchases of **gifts**
- Preference for **Duty Free** Shops
- Like to purchase products in the brands' **country of origin**

**8/10** Bring back gifts and don't know which products or brands they want

**7/10** Like Duty Free because of price, convenience & choice

 1/2 Russian

- High average **spending**

**€218** Per trip

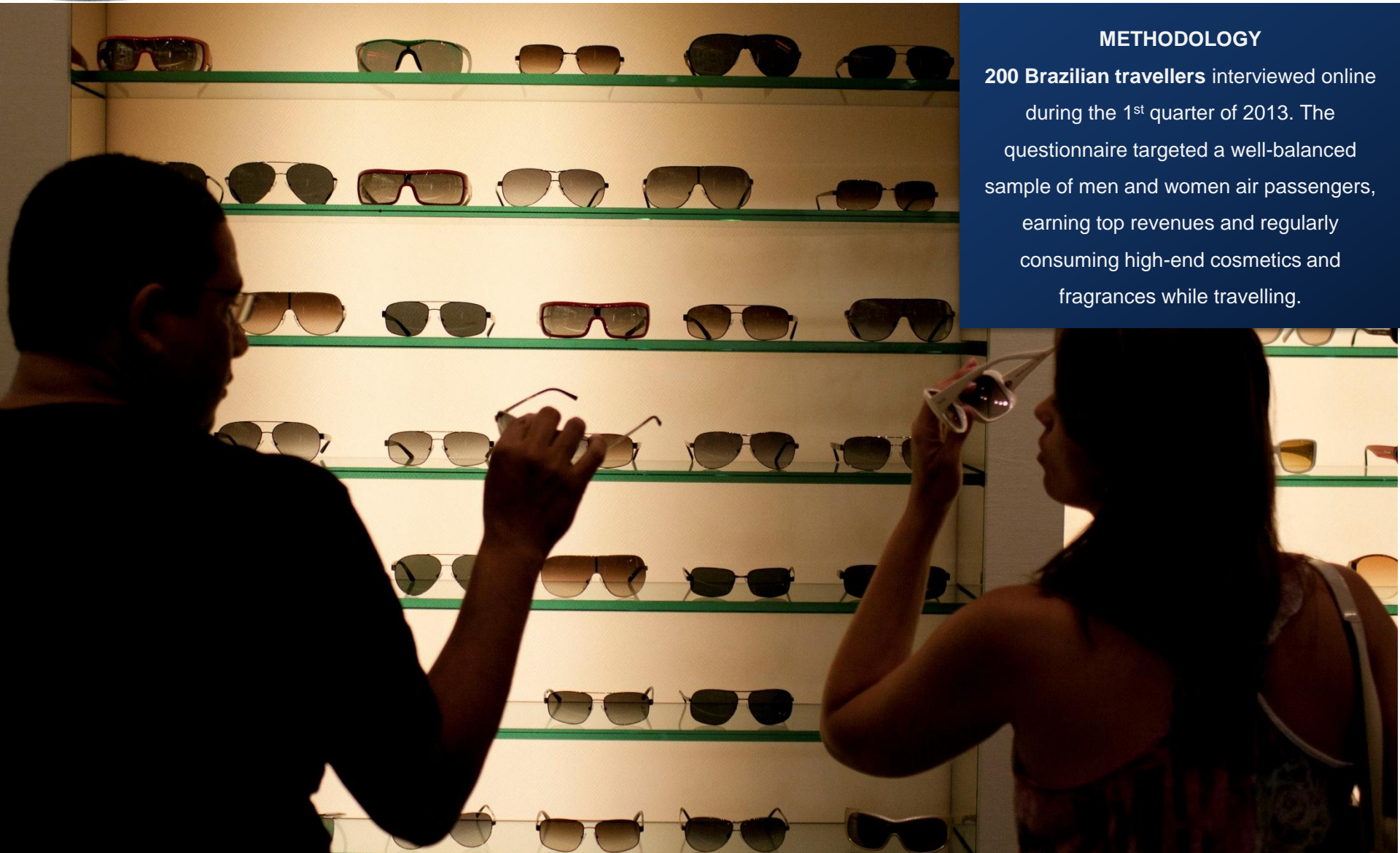
- **Europe** is their top shopping destination



# Focus on Brazilian Global Shoppers

## METHODOLOGY

200 Brazilian travellers interviewed online during the 1<sup>st</sup> quarter of 2013. The questionnaire targeted a well-balanced sample of men and women air passengers, earning top revenues and regularly consuming high-end cosmetics and fragrances while travelling.



# Brazilian Global Shopper ID CARD



- Above average purchasing of certain categories



- High ad awareness

**93%** Pay attention to airports advertising

High-end cosmetics & fragrances

- **Impulse** purchasing



Don't know exactly which products/brands they want

- Preference for **Duty Free** Shops

**6/10**

Like Duty Free Shopping because of prices, convenience and choice

- High average **spending**

**€230**

Per trip  
Vs. €225 for other nationalities

- Top shopping destinations





## METHODOLOGY

**200 travellers from the US** interviewed online during the 1<sup>st</sup> quarter of 2013. The questionnaire targeted a well-balanced sample of men and women air passengers, earning top revenues and regularly purchasing high-end cosmetics and fragrances while travelling.





# American Global Shopper ID CARD



- **Above average purchasing** of certain categories
- High ad **awareness**



**90%** Pay attention to airport advertising

High-end cosmetics & fragrances

- **Impulse** purchasing

**85%** Don't know exactly which products/brands they want

- Preference for **Duty Free** Shops

**7/10** Like Duty Free Shopping because of prices and convenience

- High average **spending**

**€195** Per trip  
Vs. €185 for all mature countries

- Top shopping destinations



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*showcasing the world*



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