

TRAVEL RETAIL SURVEY

**Are we aware of the benefits offered by non-place marketing as
a new retail sales channel?**



<http://it.wikipedia.org/wiki/Nonluogo>

*The term **non-place** encompasses two complementary, but separate notions: first, spaces of institutions formed in relation to certain ends (transport, transit, commerce, leisure) and second, the established relationship between individuals and these spaces.*

*The installations needed for the accelerated circulation of passengers and goods (**high-speed roads** and **railways**, interchanges, **airports**) are just as much non-places as the means of transport themselves or the great commercial centres.*



The upsurge in consumer mobility and the quest for new areas boosting retail profitability led to the exploration and measurement of **transport architecture** as a distribution channel per se.

Transit places are at the core of retailing as well as at the foundation of new points of sale featuring excellent consumer appeal.

Trends and attractiveness of these new spaces have been quantified through the data collected among the **target groups potentially interested.**



The survey explored shoppers' POV on three "transit places" in Italy, broken down as follows.

Airports with domestic and/or international flights which offer "*many shopping opportunities besides service areas and food/drink stands, i.e.:*

- apparel, accessories, personal care, wellbeing, healthcare shops*
- leisure, entertainment shops."*



Medium-to-high traffic railway stations, i.e. railway stations in provincial capitals which offer “many shopping opportunities besides service areas and food/drink stands, i.e.:

- ❑ *apparel, accessories, personal care, wellbeing, healthcare shops*
- ❑ *leisure, entertainment shops.”*

Motorway service areas (Motorways) which “offer many shopping opportunities and a wide range of food, apparel, accessories, personal care, wellbeing, healthcare products as well as entertainment products, toys and gifts besides services areas and food and drink stands.”



- ❑ What is the potential customer base of transit places among travellers?
- ❑ Is mobility (travelling, commuting etc.) and usage of transit places a precondition to shopping?
- ❑ What should airports, railway stations and motorway service areas offer to become attractive shopping areas vs. mere transit places?
- ❑ What is the role played by store arrangement and offering in promoting purchases in airports, railway stations and motorway service areas?
- ❑ Can transit places be regarded as shopping destinations?



The data collected, i.e. consumer experience, opinions and intentions, were analysed in general and with reference to the following 2 target groups:

- ❑ **Travellers passing through transit places** for business, leisure/pleasure, personal or family reasons.
- ❑ **Consumers living near transit places**, located at max. an hour distance (respondent's estimates) and easily reached by public transportation.



**PANEL COMPRISED OF 4,300 INDIVIDUALS OVER 18 YRS
REPRESENTATIVE OF THE ITALIAN POPULATION
800 SAMPLING POINTS**



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TOTAL POPULATION - Base: 50,112,703

How many times did you pass through an Italian airport in the last 12 months?

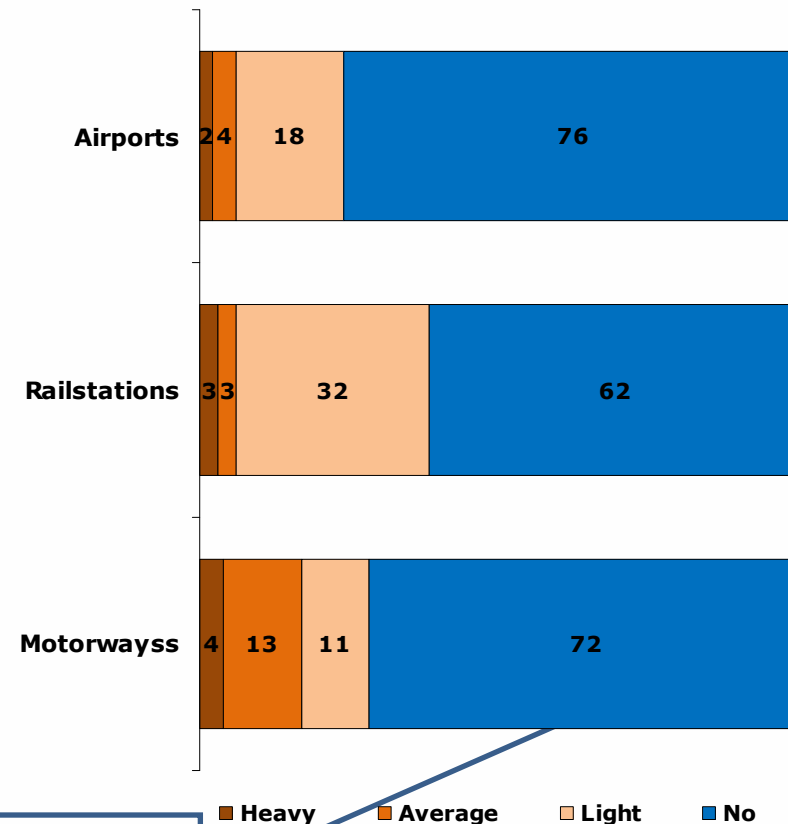
- No transit
- 1/2 transits = LIGHT
- 3/6 transits = AVERAGE
- 7-10 transits = HEAVY
- More than 10 transits = HEAVY

How often did you pass through a medium-high traffic railway station, i.e. in provincial capitals in Italy, in the last 12 months?

- Everyday, almost everyday = HEAVY
- 2/3 times a week = HEAVY
- Once a week = AVERAGE
- 2/3 times a month = AVERAGE
- Once a month, less often = LIGHT
- Never

How often have you stopped at a motorway service area in the last 30 days?

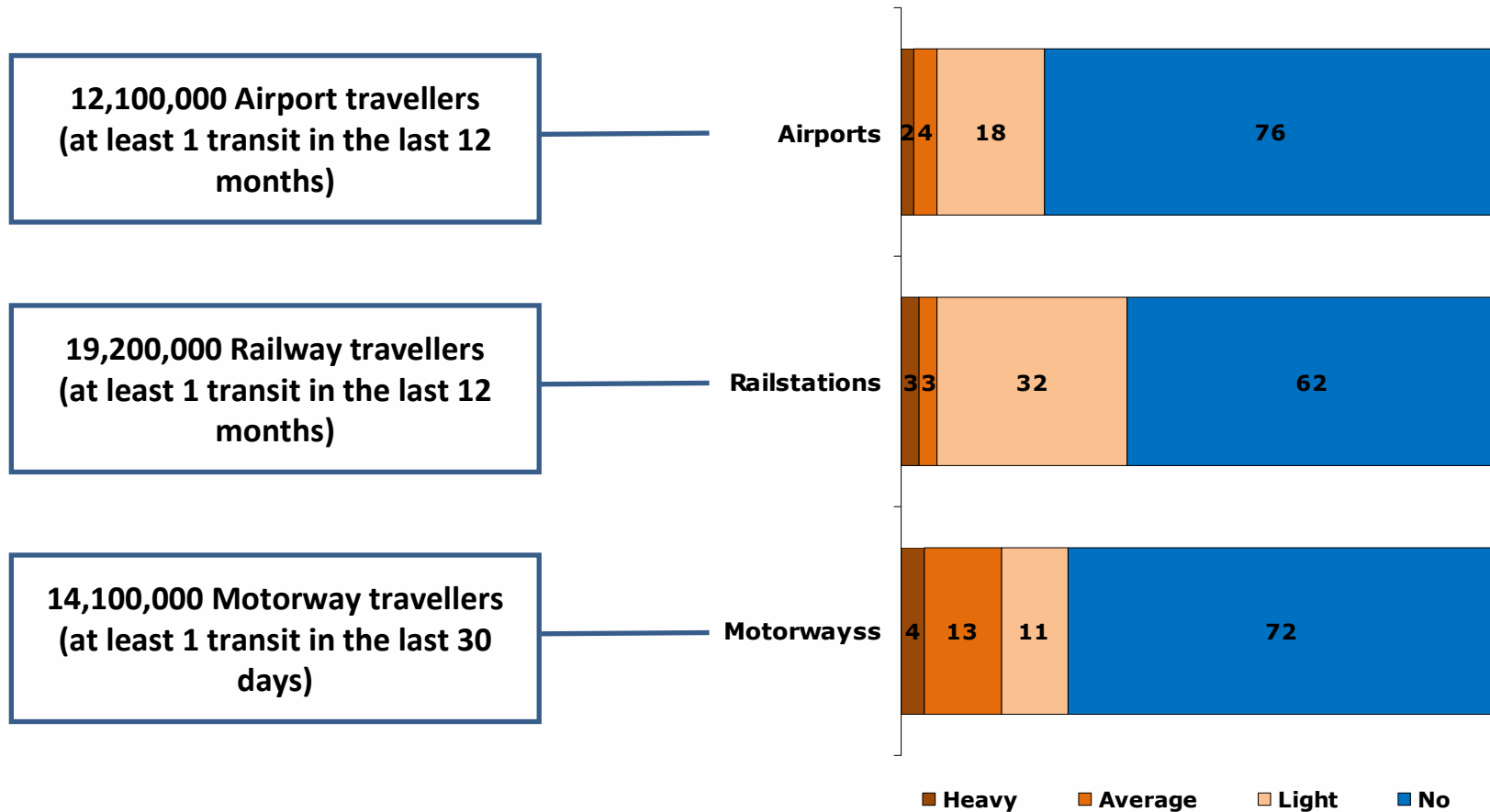
- Never
- Once = LIGHT
- 2/3 times = AVERAGE
- 4/5 times = AVERAGE
- More than 5 times = HEAVY



Car non users 40%

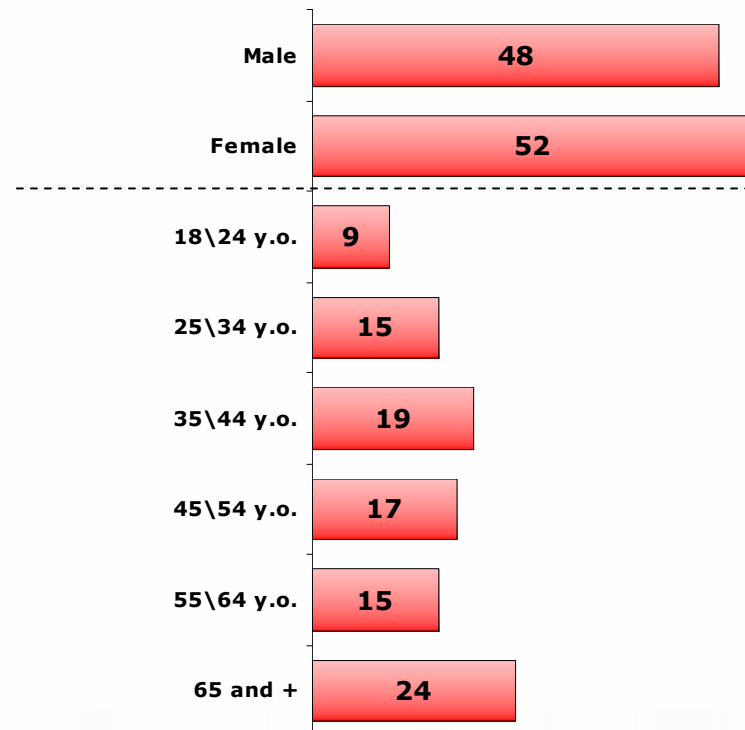


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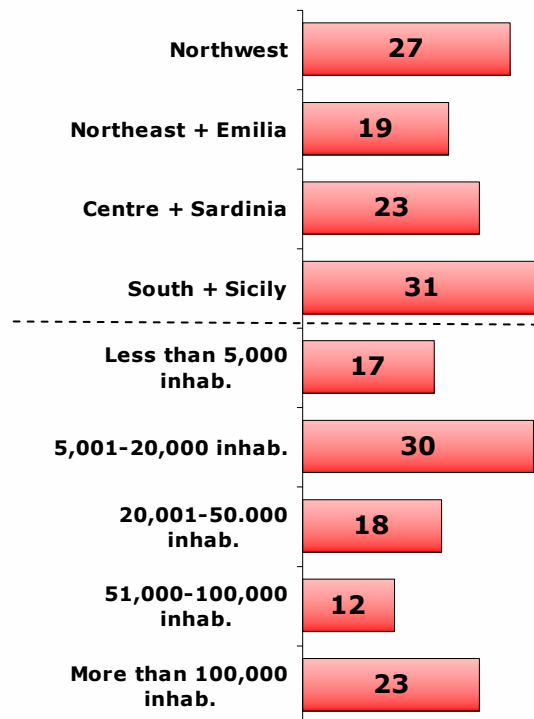
AIRPORT TRAVELLERS	RAILWAY TRAVELLERS	MOTORWAY TRAVELLERS
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Concentration Indices

107	107	140
93	94	63
117	125	39
153	137	127
116	102	133
104	99	119
79	91	89
58	72	72



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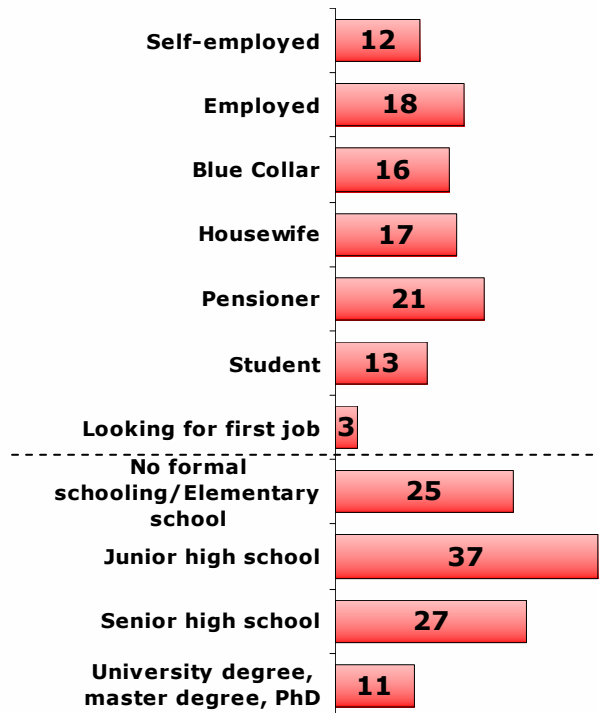
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Concentration Indices

129	114	118
95	100	117
90	101	83
85	88	87
77	82	99
86	91	96
102	111	101
106	102	92
131	115	109



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	AIRPORT TRAVELLERS	RAILWAY TRAVELLERS	MOTORWAY TRAVELLERS
<i>Concentration indices</i>			
	133	102	161
	157	133	155
	98	92	108
	56	70	50
	62	83	85
	134	142	35
	87	109	86
	35	47	57
	87	92	87
	135	129	129
	197	169	165



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(% Definitely + Fairly agree)



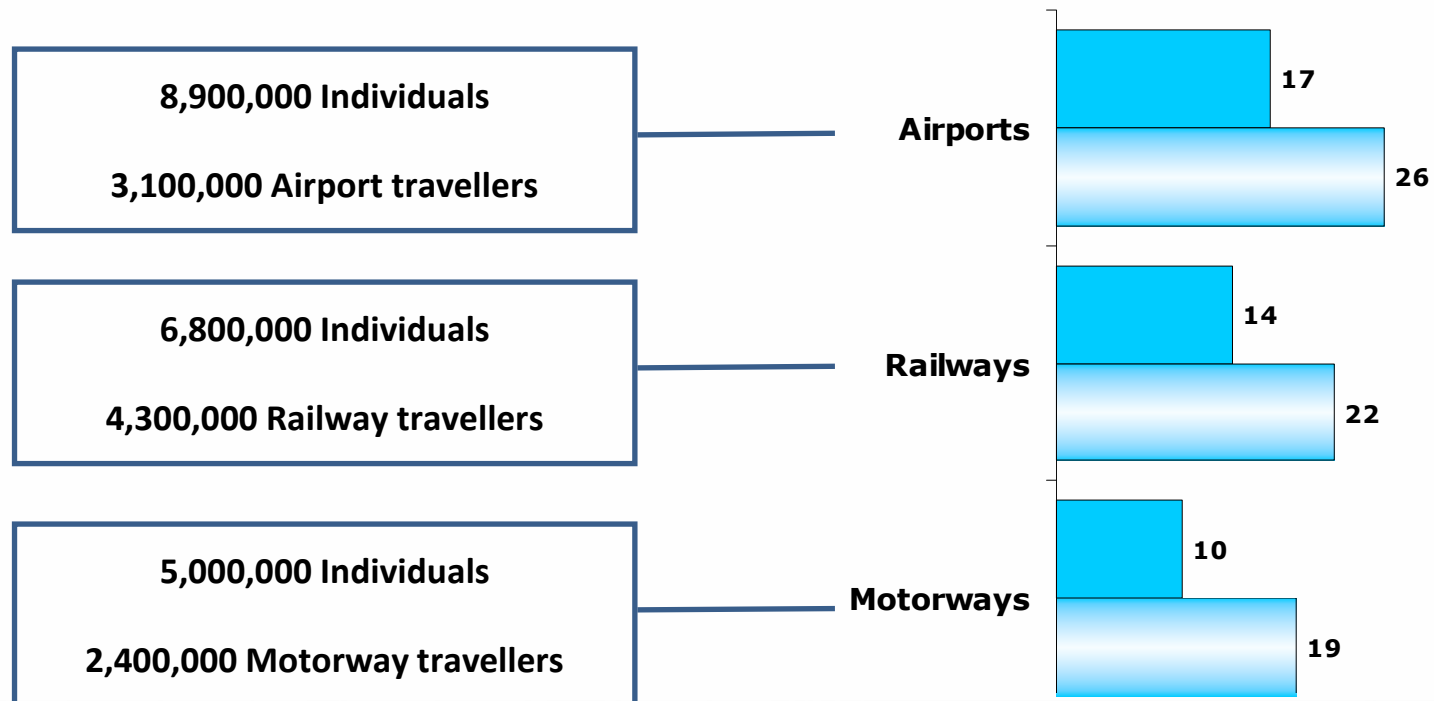
AIRPORT TRAVELLERS	RAILWAY TRAVELLERS	MOTORWAY TRAVELLERS
12,100,000	19,200,000	14,100,000
39	38	36
38	39	37
31	32	29
25	27	23
27	26	26
22	22	22
21	21	22
20	22	19



How interesting is it for you to shop at... (TRANSIT PLACE)... while passing through these places and having enough time?

(% Very + Fairly interesting)

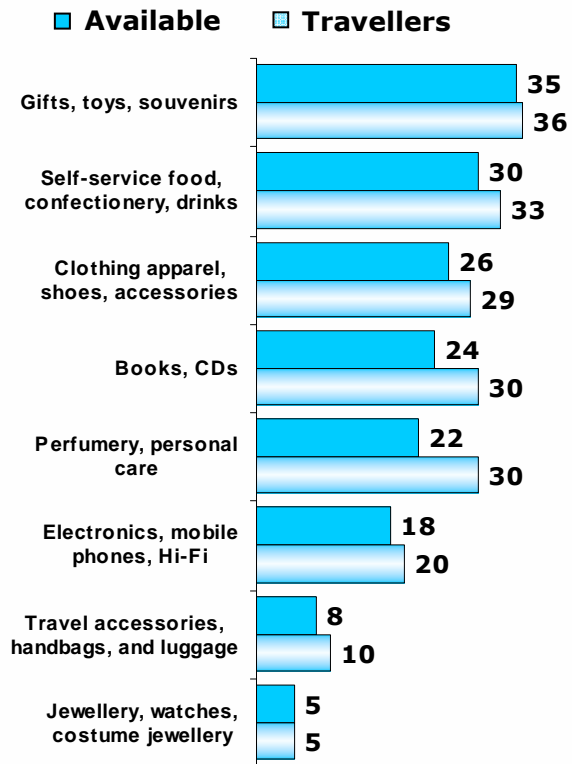
■ Total ■ Travellers



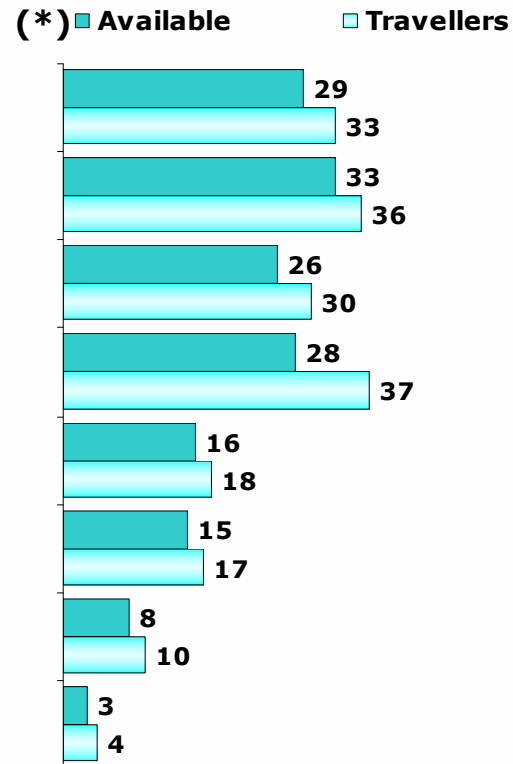
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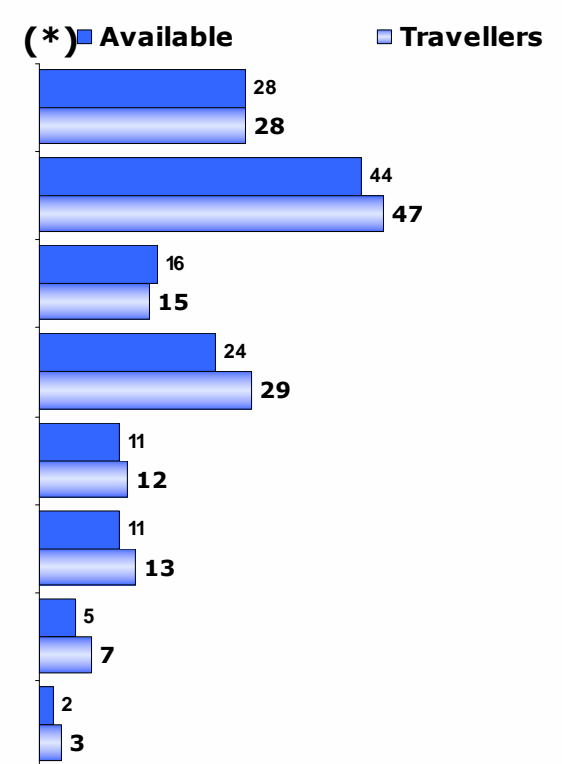
AIRPORTS



RAILWAYS



MOTORWAYS



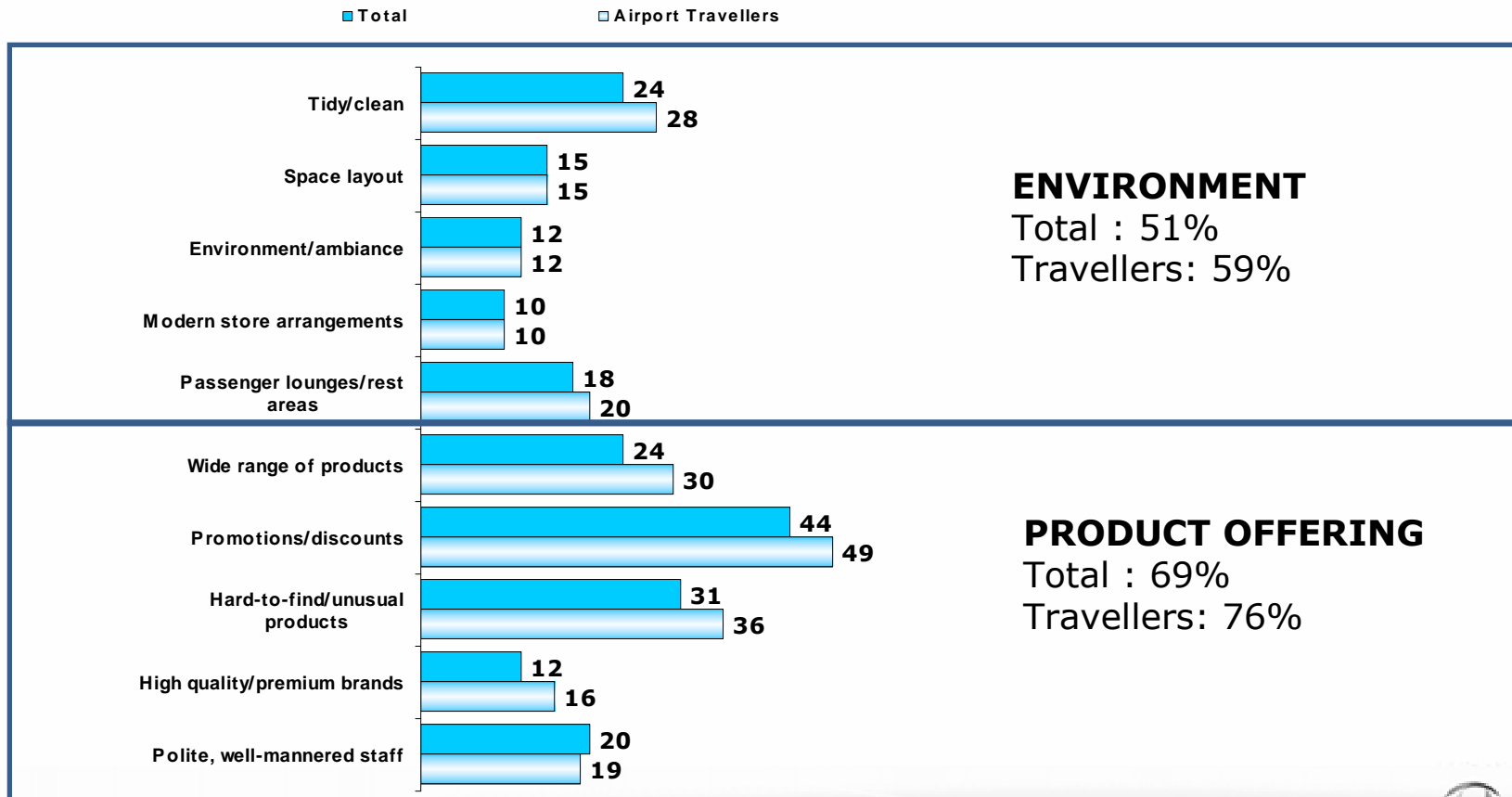
(*) Individuals interested in shopping + individuals who may consider making a purchase



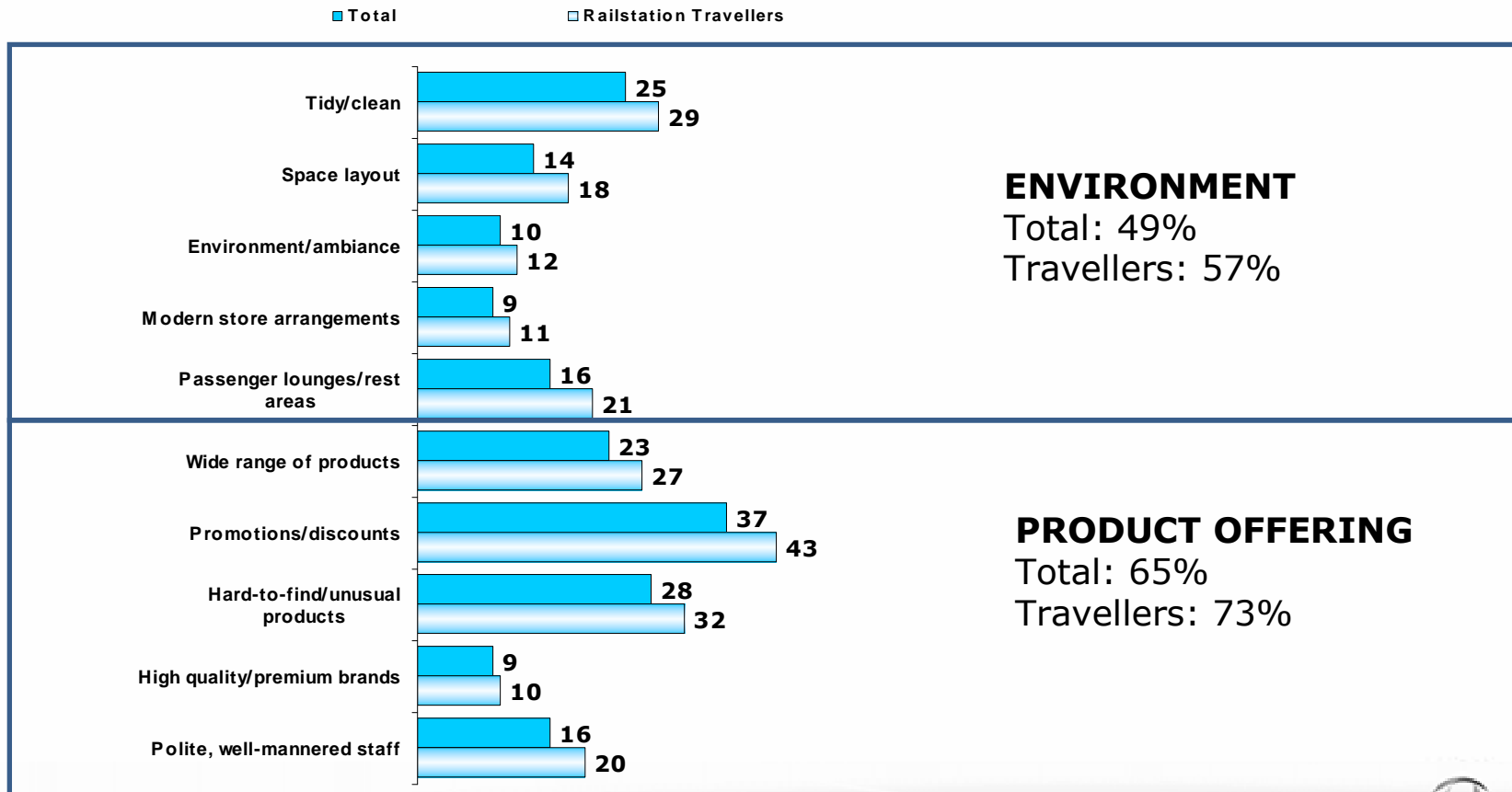
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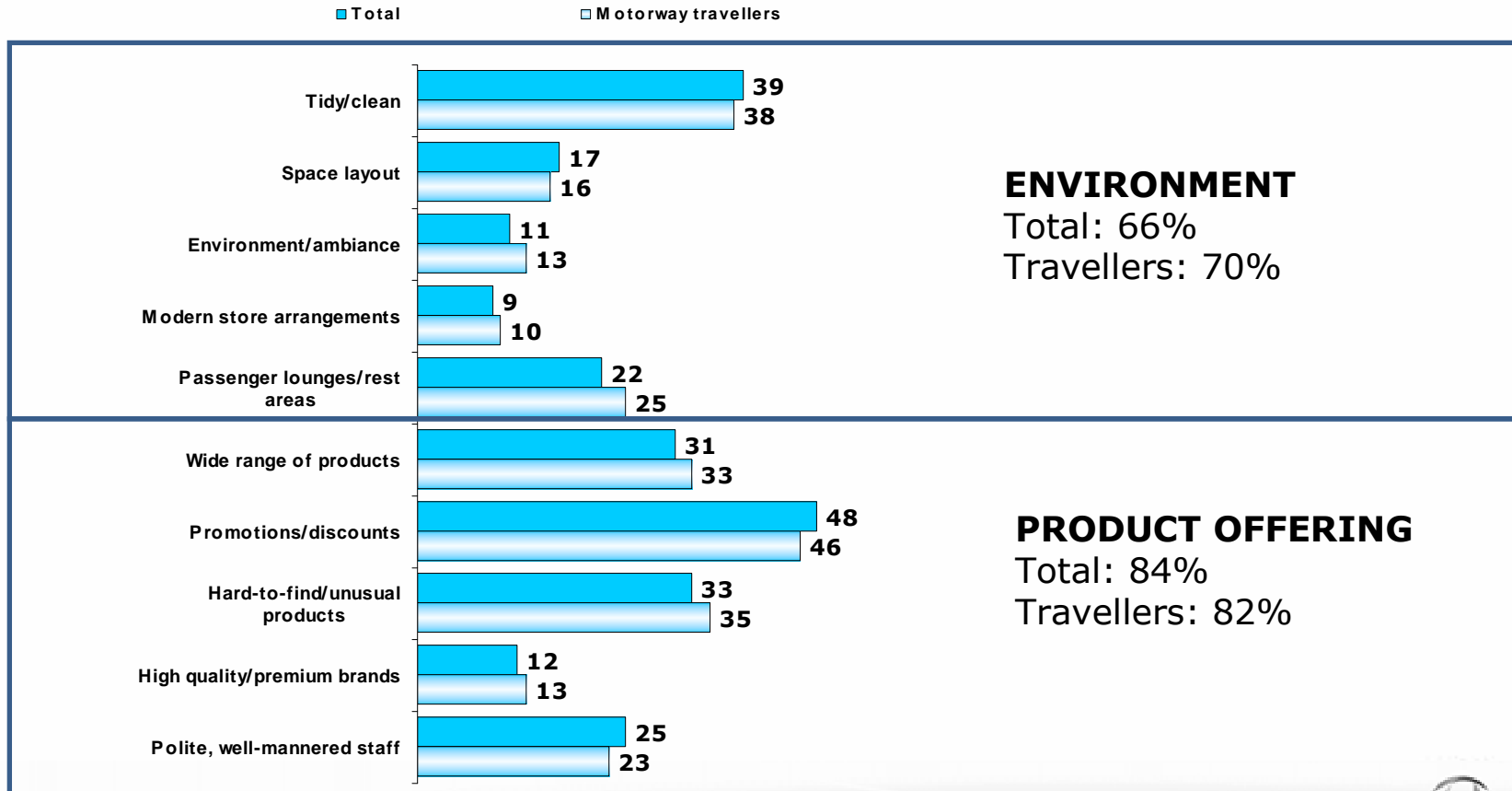
If you had to spend some time or just pass through an AIRPORT with many shopping opportunities, which of the following aspects do you deem more interesting/do you expect would pave the way to your purchase?



If you had to spend some time or just pass through a RAILWAY STATION with many shopping opportunities, which of the following aspects do you deem more interesting/do you expect would pave the way to your purchase?



If you had to spend some time or just pass through a MOTORWAY SERVICE AREA with many shopping opportunities, which of the following aspects do you deem more interesting/do you expect would pave the way to your purchase?



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Apart from travelling or being on the move, how interested are you in **planning a trip to a destination** with an AIRPORT/RAILWAY STATION offering attractive shopping opportunities?

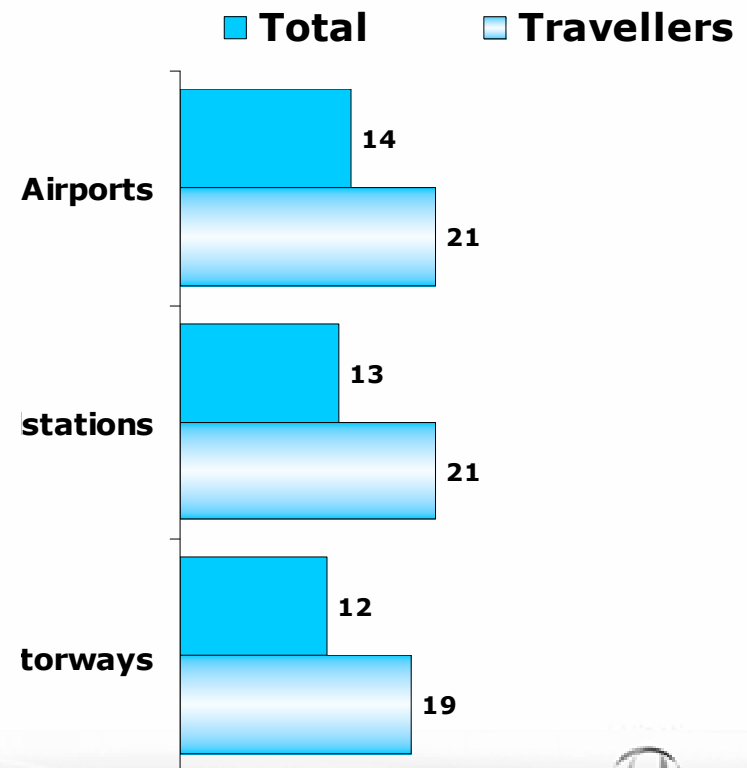
Overall, how interested are you in **planning ahead a stop** at a MOTORWAY SERVICE AREA with attractive shopping opportunities?

7,100,000 Individuals
2,500,000 Airport travellers

6.400,000 Individuals
3,700,000 Railway travellers

6,200,000 Individuals
2,700,000 Motorway travellers

(% Definitely + Probably)



- ❑ **Travellers' purchase behaviour is by no means different from consumers' standard shopping behaviour, and is based on the same set of attitudes and expectations.**
- ❑ **The potential consumer base is relevant but transit places are only marginally deemed to be shopping destinations, at least so far.**
- ❑ **Airports, railway stations and motorway service areas could very well be seen as a regular distribution channel in the eyes of consumers, and call for specific "logistic" characteristics, but with sales rationales perfectly comparable to other non-places.**





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Research &
Analysis

TRAVEL RETAIL SURVEY



POPAI
THE GLOBAL ASSOCIATION FOR MARKETING AT RETAIL
ITALY

