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THE GLOBAL SHOPPER & BRANDS COMMUNICATION

AT AIRPORTS

Maria Navarro Moreira da Cruz | 2039

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Luísa Agante

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ABSTRACT

This project aims to illuminate two perspectives on travel retail. On the one hand, it describes the main character of the shopping scenario at airports, namely the Global Shopper. It covers the entire profile of the referred character, the main nationalities that represent him and the current shopping trends of the passenger. Also estimates of the booming nationalities and the future purchasing trends are accurately presented. On the other hand, the travel retail market is analyzed from the airport brands' perspective. It is described what is currently done in terms of brands communication in the top ten airports around the world and the expected future market retail trends.

To accurately explore the Global Shopper behavior and purchasing preferences, a market research was conducted with a sample of 128 respondents, male and female, from different nationalities, age groups, occupation and education backgrounds. The essay tests hypothesis regarding the relevance of several variables in the purchasing process of the Global Shopper in order to understand the most pleasant way to approach consumers in travel retail. The main variables studied concern the reasons to shop at airports, to whom the passenger shops, the preferred category and brand of purchase, feelings while shopping abroad, impulsive buying behavior, brand loyalty, the use of mobile devices in the shopping process, brands communication at airports, pre-ordering online and the attitude towards self-service stores.

Some findings were in accordance with expectations, while others were a surprise and may produce valuable recommendations for future travel retail practices.

The main relevant results concern two areas, namely pre-ordering online and self-service stores. Results showed a certain stress about not having enough time to choose between the various offerings in travel retail, as well as difficulty in dealing with crowed stores. However, pre-ordering online was not common, which would be an initiative that could solve the discomfort at airport's stores. Moreover, self-service would promote efficiency in stores allowing passengers to save time if they already know how to go through the shopping process by themselves. Another possible recommendation concerns differentiating the strategy in travel retail for the two genders. Some differences were found in the categories bought by male and female, as well as to how brands should shape their approach concerning the demands of each gender.

INTRODUCTION

The travel retail market became relevant over the years with the democratization of travelling and the opportunities inherent to this evolution. It is a growing and dynamic market that meets several passengers from different nationalities with unique characteristics. The market has been evolving and currently presents a broad variety of offerings to please passengers and improve their travelling experience. A special kind of passenger is the so called Global Shopper, who represents people from all over the world who fly to their preferred destinations and spend time at airports visiting and buying products from several brands. The Global Shopper has unique shopping habits and requirements constantly evolving resulting in a tremendous challenge for brands in travel retail. It is a different buyer from the one of the high streets and all nationalities together characterize his profile. The passenger is the main character and the stage is all the shopping environment he passes through in the airports experience.

Therefore, the main purpose of this project is to present a detailed analysis of the Global Shopper's purchasing habits and his motivations before and at the point-of-sale (PoS) at the airport, in order to recommend a clear path to shape the brands communication to the future Global Shopper.

To accurately explore the Global Shopper's purchasing process, a detailed market research was developed. Firstly, by combining information from several sources (references are presented as footnotes throughout the whole essay) an analysis of the current situation will demonstrate the actual profile of the Global Shopper and the main nationalities that characterize him. Several dimensions were analyzed about each nationality for comparison purposes. The nationalities booming in the coming years will be considered, as well as the future shopping trends that will shape the travel retail market. At the same time, the market in which the Global Shopper acts will be presented. The travel retail market will be exposed concerning its current and future trends and relevance in a worldwide perspective. For this analysis, a list of the top ten airports in the world were selected as a sample in order to have a general idea of how brands already communicate with the consumer in travel retail. At last, to fulfill the main gaps of information in the Global Shopper's profile, a questionnaire with direct questions covering the main topics of the shopping process was built and launched to a passengers sample around the world.

THE GLOBAL SHOPPER

Profile

Global Shoppers are people who clearly associate travelling with shopping. They come from all over the world and buy wherever they are, either to buy brands they cannot find in their own country (50%) or to buy brands they can actually find in their own countries (49%). Among those, cost savings (70% buy brands for being cheaper abroad) and hedonist desires (~ 42%) are the main drivers. Global shoppers are regular travellers: 21% make more than 4 trips per year; 36% make 3-4 and 43% make 1-2 trips per year[1]. They are usually characterized by stress, excitement and physical and psychological tiredness[2], while having significant purchasing power, higher than average consumption level and unique buying habits. They are considered the world's most valuable consumers and the fast-growing global retail market was worth more than EUR 48 billion in 2013[3]. Moreover, Global Shoppers spend 4 times more than locals at high street retailers[4]. Concerning the unique buying habits, they buy for personal purchases (86%), gift for family/friends (79%) or as a request (31%). They are moved by a mix of planned (31% know exactly which products or brands they look for and don't change their minds at PoS) and impulse purchase (53% have specific brands in mind but may change it at PoS). The top three most frequently products bought are Fashion (84%), Cosmetics & High-end Fragrances (81%) and Accessories (79%)[5].

[1] Global Shopper Study by JCDecaux, 2013
[2] http://www.jcdecaux.co.uk/knowledge-bank/airport-stories
[3] http://luxurysociety.com/articles/2014/06/travel-retail-a-sixth-continent-with-1-billion-consumers
[4] http://pt.slideshare.net/ManelikSfez/the-rise-of-the-globe-shopper
[5] Global Shopper Study by JCDecaux, 2013

Main Nationalities

The nationalities with the highest amount spent in 2013 while travelling were China (represent 27% of the total amount spent in travel retail), Russia (17%), Japan (3%), Indonesia (3%) and USA (3%). The world's top destinations by share of total spent are France (19%), UK (16%), Singapore (11%), Italy (16%) and Germany (11%)[6]. Americas was the region that showed the strongest international tourists growth in the first 10 months of 2014 (+8%), followed by Asia & the Pacific (+5%) and Europe (+4%)[7].

To further understand the Global Shoppers main nationalities, a detailed analysis of several dimensions was conducted, focusing on: the number of annual travellers; top destination; average amount spent; nations' growth; reasons to shop when travelling; to whom they shop; preferred category of purchase; preferred brand of purchase; feelings when shopping abroad; planned or impulse purchase; check online information before arriving to the PoS; check information with peers before arriving to the PoS. These dimensions were selected according to the relevant characteristics present in the previously created profile of the Global Shopper. The ones that most impact on how the traveller interacts with brands were the selected ones to further analyze each nationality in particular (Appendix 1).

Main Nationalities booming in the future

Between January and October of 2014, the volume of international tourists reached 978 million, a growth of 4.7% (or 45 million arrivals) compared to the same period in 2013.[8] The referred growth is well above the long-term trend projected by UNWTO for the period 2010-2030

[6] http://www.globalblue.com/specials/upload/Corporate/Webinar_GetToKnowTheGlobeShoppers_140409.pdf
[7] http://media.unwto.org/press-release/2014-10-30/international-tourism-shows-continued-strength
[8] http://www.trbusiness.com/regional-news/international/international-tourism-set-for-new-record/

(+3.3%)[9]. Due to the democratization of travelling and the middle-class growth, the Global Shopper volume is expected to grow in the coming years.

China currently occupies the first place among the highest spender nations. The top three categories bought by the referred nation are Watches & Jewellery (31%), Fashion & Clothing (29%) and Department Stores (23%). The main reasons to shop abroad are the price versus China (63%), Style & Design (49%) and Product Quality (37%)[10]. However, a slowdown in the Chinese total spending in travel retail is coming – but maintaining their position of world's #1 global shopper nation. The future will be more focused on the stronger tourist arrivals in the Asia Pacific and the USA, than in Europe. Moreover, the Global Shopper nationalities that are expected to show a relevant growth in the travel retail market are Thailand, Malaysia, Vietnam, Qatar, Saudi Arabia and Kuwait[11].

Finally, after analyzing where the Global Shopper comes from, it is important to know the preferred travel destinations by nationality. From Global Blue 2015, Chinese, Japanese and American's preferred destination is Paris; Thais, Qataris and Saudi Arabians mostly go to London; Indonesians and Malaysians prefer Singapore; Russians favor Milan; Vietnamese's preferred destination is Cambodia and Kuwaitis prefer Dubai.

[9] http://luxurysociety.com/articles/2014/06/travel-retail-a-sixth-continent-with-1-billion-consumers
[10] http://pt.slideshare.net/ManelikSfez/the-rise-of-the-globe-shopper
[11] http://www.globalblue.com/specials/upload/Corporate/Webinar_GetToKnowTheGlobeShoppers_140409.pdf

Future shopping trends

Global Shoppers are increasingly showing unique shopping behaviors. They are always connected to the internet in their mobile devices and have a presence in all social media to share travel reviews with their peers. In the future, they will mainly shop online through apps and mobile sites, and will be more demanding concerning the in-store and on-line experience consistency. The traveller will be more independent and will appreciate both the self-service and uniqueness of the shopping journey.

Consumers are becoming more and more sophisticated at multichannel shopping. 80% of global consumers research electronics, computers, books, music and movies before buying them in stores, and 60% go online in search of information about clothes, shoes, toys and health & beauty products before arriving to the PoS[12]. Therefore, brands must take into account the several consumer trends that will impact the travel retail market in the coming years[13]:

- *Multiplicity*: Desire for new experiences that offer interaction with all people's senses, allowing participation and a range of touch points to play with. People expect engaging information and experiences from brands.
- *Hyper Efficiency*: People are seeking smarter and more efficient ways to solve problems.
- *The New Industrial Revolution*: Digital and technological advances are enabling people to move from only users to creators. The future for retail stores holds a greater use of online to find the best products at the best prices.
- *Escape*: Increasing desire to let go of all responsibilities and inhibitions. Wish to indulge in childlike freedom and sheer hedonistic joy.

[12] https://www.pwc.com/us/en/retail-consumer/publications/assets/pwc-us-multichannel-shopping-survey.pdf

[13] http://www.forbes.com/sites/onmarketing/2014/02/04/six-trends-that-will-shape-consumer-behavior-this-year/

- *Mindfulness*: People are seeking for more depth and meaning, feeling responsible for the ethical status of the things they do, buy and support.
- *Super-personalized*: Brands must take advantage of technology to give consumers what they want, sometimes without even being asked. They desire to shop the way they want rather than being forced down a single route. Consumers are seeking out friendly faces that provide them individual attention.

Current brands communication at the Top Airports

In travel retail, brands have a short opportunity to attract and engage costumers and convert sales, while competing side-by-side with several brands with different products. Consumers are likely to browse through the full brand offerings, instead of just looking for the brands they already had in their minds before arriving to the PoS. Passengers spend almost 3 hours per trip in major international airports and they are highly captive: 92% pay particular attention to advertising in airports[14] and 85% of frequent flyers enjoy airport advertising[15].

The visual impact is an extremely important element of communication in the referred market. The use of large formats is a trend as well as strategic locations and premium positioning to provide passengers an unforgettable experience.[16] Two key communication objectives in airports are to increase the conversion rate and the time spent shopping. The Arthur D. Little study[17] highlights specific procedures that should be taken into account to meet those objectives. Airports must position core business categories (the "must-buy" products) right after the security checkpoints to enable passengers to complete their pre-planned shopping and then feel comfortable to enter the second group of boutiques with diversified categories. Secondly, to capture passengers that spend short time at airports, last-minute offers of top-selling brands must be positioned near boarding gates (this concept is already seen in the Amsterdam Airport Shiphol).

[14] http://luxurysociety.com/articles/2014/06/travel-retail-a-sixth-continent-with-1-billion-consumers
[15] http://www.jcdecaux.co.uk/knowledge-bank/airport-stories
[16] http://www.ana.pt/en-US/Topo/institucional/BusinessandCompanies/Non-Aviation/Advertising/Pages/Advertising.aspx
[17] http://www.adlittle.com/downloads/tx_adlreports/ADL_Mastering_Airport_Retail.pdf

Nowadays, several airports already take these procedures into consideration and top ten duty-free stores (Figure 1) by travel retail sales were selected as a sample[18]. Walk-through shops are a trend as well as "time to gate" communication to maximize shopping time (for instance, by introducing flight information panels inside the shops). The Incheon Airport shows a calm and relaxing travel retail area that wows passengers and showcases local culture to create a sense of place, providing an excellent experience. In the Singapore Changi Airport, the passengers are welcomed with a friendly atmosphere and distractions that make them want to spend more time at the airport. It is highly digitalized providing a unique large format media called The Digital 360º. These giant columns offer 360 degrees of branding digital visibility on 16 individual faces[19].

1. Dubai International Airport
2. Incheon International Airport
3. London Heathrow Airport
4. Singapore Changi Airport
5. Hong Kong International Airport
6. Paris-Charles de Gaulle Airport
7. Frankfurt Airport
8. Tallink/Silja Terminal (ferry port), Finland
9. New Bangkok International Airport
10. Amsterdam Airport Schiphol

Figure 1: Top 10 duty-free stores by travel retail sales

Figure 2: Singapore Changi Airport

[18] http://travel.cnn.com/explorations/shop/and-worlds-most-lucrative-airports-are-006206
[19] http://www.jcdecaux-oneworld.com/2014/01/luxury-digital-a-match-made-in-airports/

Also, a digital billboard that measures 39m2 was suspended five meters above the ground in the Paris-Charles de Gaulle Airport[20].

Figure 3: Paris-Charles de Gaulle Airport

Unique shopping concepts and luxury brands give the Hong Kong International Airport a high-end feel, making the passenger feel he is in a mall rather than at an airport. In the London Heathrow Airport, passengers' data is used to welcome them with the appropriate speakers on the right languages and cultural sensitivities as well as to reconfigure shop displays to suit national tastes. There's also a mapping app that allows customers to locate desired shops without wasting time. A "personal-shopper" service was developed to attract the richest travellers out of the business lounges. The trend is to focus on the services personalization and to connect technologies to cross all the passengers' information[21].

<u>Future retail trends</u>

Along with the Global Shopper's trends, the travel retail market is evolving to meet his needs[22]:

- *<u>E-commerce</u>* is becoming a threat for physical stores.
- *<u>Click-and-collect shopping</u>*: Customers order online and pick-up the items on the physical stores.
- *<u>Geofencing</u>*: Some of the world's top airports are turning to mobile apps, social media and intelligent technologies including geolocation to increase customer engagement.
- *<u>Self-service</u>*: Consumers prefer to do by themselves to obtain a more efficient service.

[20] http://www.jcdecaux-oneworld.com/2014/01/luxury-digital-a-match-made-in-airports/
[21] http://www.economist.com/news/business/21601885-battle-catch-people-golden-hour-they-board-getting-ever-more
[22] http://www.travelagentcentral.com/trends-research/top-10-retail-trends-2013-38486

- *Variable pricing* based on time of day, competitors' pricing, fluctuating demand and individual consumer profiles.
- Store windows are becoming *24/7 retail platforms* through technologies such as interactive touch screens and QR codes.

METHODOLOGY

Based on information collected from secondary data, the research focused on further understanding how the Global Shopper will evolve in the coming years. The main dimensions that were tested are related to both the approach before arriving to the PoS, such as pre-ordering online and attention to ads; and the approach already in store, such as self-servicing and the feelings throughout the shopping process. The final objective is to discuss how travel retail brands communication should develop in order to attract and engage with the future passengers.

In the Literature Review some gaps were found in the description of the Global Shoppers' nationalities. Therefore, the quantitative research aimed to further understand the Global Shopper profile and to know each nationality's consumer habits.

Since the main purpose of the referred market research was to get objective data and use statistics to achieve general purchase behaviors, it was more relevant to focus on specific variables to generate hypothesis of future trends. Thus, a quantitative methodology and a questionnaire were conducted to get direct Global Shoppers' answers concerning their travel retail experience (Appendix 2).

The questionnaire was launched through social media and e-mail to get the highest number of respondents possible during the time period it was out, 28 days. To ensure only Global Shoppers' data would be analyzed, four screening questions were built, namely, to rate their interest in shopping at airports (1 to 6 likert scale), which stores they usually visit when they are at an airport; which brands they usually buy when they are at an airport; and, finally, how much time they usually spend when shopping at an airport.

A total of 326 people answered the questionnaire, however, only 128 people passed through the four screening questions and filled the full questionnaire. Data from 23 nationalities (Appendix

3) was gathered, in which 42 were male and 84 female, with the age range starting at 15 years old.

The questionnaire was divided into five areas of analysis. The first one's objective was to understand the relation between travelling and shopping. For this purpose, several questions were developed to evaluate how intense the purchasing habits of Global Shoppers are, as well as their loyalty to brands in travel retail. Secondly, the focus was on the travelers' buying behavior. In this section the variables analyzed were the reasons why Global Shoppers buy at airports, to whom they buy, which category they mostly buy, the attitude towards purchase, pre-order online, the use of mobile devices and the attitude towards self-service stores. The third area concerned the attention to ads at airports and the impact of brands communication the last time they were at an airport. After that, the Global Shoppers' feelings were explored, as well as their opinion about the best and worst things concerning the travel retail market. The questionnaire ended with the fifth area which asked several demographic questions to build each respondent profile.

RESULTS

To test the referred hypothesis with results some statistical techniques were used. With data from 128 respondents, correlations, cross tabulations and means were founded in order to present relevant conclusions about the purchasing process of the Global Shopper.

Concerning all the significant statistical results extracted from the questionnaire, relevant correlations between the variables were found. People who **pre-order online** before arriving to the airport also tend to use their **mobile devices** in the shopping process in store (r = 0.331, p = 0.000 – Appendix 4). However, from the sample, 85.9% of total travellers never had pre-ordered online (Appendix 5). From this we may conclude that pre-ordering online to airports is not common yet, even within a target that uses their mobile devices and are somewhat **loyal** to the brand they usually buy (39.8% of total respondents are somewhat loyal; 23.4% shop around a lot; 20.3% are less loyal than most people and 16.4% are very loyal – Appendix 6). Secondly, Global Shoppers who enjoy being helped by staff in stores also appreciate shopping where people know them (r = 0.303, p = 0.001 – Appendix 7). In a likert scale from 1 negative to 7 positive, the mean was 4.23 suggesting that not all people actually like being helped in stores. As mentioned before, **self-service in stores** is a trend and the last result tests the hypothesis that people may actually prefer to go through the shopping process by themselves. The respondents showed to be neutral about aid in stores which may be a dimension to be explored by brands in the coming future. This last result is related to the next correlation, where people that don't like being helped by staff in stores also consider self-service stores more pleasant (r = - 0.397; p = 0.000 – Appendix 8). Only 4.8% of people don't enjoy self-service and prefer being helped in stores. The last relevant correlation concerns the **brand communication** the last time people were at an airport and how they felt during their travel experience. The more accurate people considered the brand communication, the more pleased they felt the last time they shopped at an airport (r = 0.323, p = 0.001 – Appendix 9). However, focusing only on the ads at the airport, the target does not consciously pay extreme attention to them, showing a mean of 4.03 in a likert scale from 1 negative to 7 positive.

By crossing the variable **gender** with several other variables, relevant results were achieved. However, no relations were found related to the variable age. Regarding **frequency of travelling**, 61.9% of men travel more than 4 times per year, compared to only 36.9% of women (p = 0.015 – Appendix 10). This may be relevant concerning the different approach brands may have to each gender. Another important dimension was the category they mostly shop. A higher portion of men usually buys Fashion items (19%) compared to women (13.3%); and the opposite happens with Cosmetics & High-end Fragrances where men's portion is only 42.9% compared to women 74.7% (p = 0.003 – Appendix 11). Technologies is also a category where the two genders show different preferences since men who mostly buy it count for 7.1% while women only count for 1.2%. Men also buy more varied categories than women, namely Food and Beverages, Liquor, Cigarettes, Chocolates, Books and Magazines and Toys. Also the evaluation of the brand communication credibility the last time Global Shoppers were at an airport was crossed with the variable gender. The output showed 84.7% of men were concentrated between 3 and 4 in a 1 negative to 5 positive likert scale, while women were more dispersed between 2 to 5 (p = 0.002 – Appendix 12). This may reflect that women are more demanding concerning the reliability of the brands' communication.

Results also showed there was a difference in the means of both men and women considering their like of shopping in stores where people know them, with men enjoying more being recognized in stores than women (in a likert scale from 1 negative to 6 positive, the mean for men was 3.57, while for women was 2.88, p = 0.005 – Appendix 13).

To conclude, the most relevant results achieved with the questionnaire data concerned the pre-ordering online and self-service. It was also noticeable the difference between men and women in several dimensions that may affect how the brands can approach each gender. The male sample travel more times per year, purchases a higher variety of categories and enjoys more being helped in stores by staff compared to the female breach.

Moreover, two open questions were launched to analyze the best and worst things about shopping at airports. Several responses appeared, being the main positive ones the tax free (25.8%), a way to kill time (18%), the variety of products/brands (9.4%), the quickness and efficiency (4.7%), the special editions (3.9%), convenience (2.3%), the fun/happiness in the shopping process (2.3%), few crowds (1.6%), the atmosphere (1.6%) and the organization in stores (1.6%). The main negative responses were the difficulty of carrying the luggage and shopping bags around (14.8%), lack of time to choose (12.5%), the crowd and limited space in stores (11.7%), the lack of offer (9.4%), expensive products (8.6%), too much time to spend at an airport (2.3%), the fact products can't be returned (1.6%) and people end up buying products they don't actually need (1.6%).

The presented work contributed to further understand the purchasing behavior of the Global Shopper and to evaluate the influence of certain variables in particular. Although the target is constituted by several nationalities, the Global Shopper was analyzed as a whole in order to define a specific type of behavior that characterizes the passenger while shopping at airports.

The main limitations of the presented market research were the fact that the sample may not be representative. Only 326 people answered the questionnaire, from which only 128 count for the analysis. Moreover, from the 128 respondents, the sample did not have enough people from the different age groups so they could be representative. Another relevant study would be to separate the answers by nationalities, however the sample did not have enough people from the different nationalities as well. Additionally, in order to have interesting results, the project had to focus on the Global Shoppers that actually purchase exclusive and expensive items instead of mass market products. Those require a high involvement from the purchasers and a more thoughtful buying process, which ultimately gives more relevant information for the study.

Therefore, for a future study it would be interesting to get enough respondents from each nationality and accurately check the differences in the buying process from each group. It would also be curious to study the shopping behavior according to the main preferred destination of each nationality in order to suggest adaptations in each airport in particular. Moreover, differences between genders were found in the presented market research. A future study must further explore these differences and new ones that may appear. Other variables that influence the shopping process of the Global Shopper would also be interesting to study. This project was focused on certain variables that may influence the process, however there are still many others to evaluate.

RECOMMENDATIONS

Improving the passenger experience remains imperative for airports. Passengers have become more demanding over the years and the Global Shoppers' evolution brings new challenges concerning future brands communication in travel retail. The previous results may present coming trends to take into account in order to promote engagement with travelers. Among the selected variables, some may depict influence in the travelling experience and the inherent purchasing process of the future Global Shopper.

A relevant result that may shape the path for future brands communication is the fact that most people from the referred sample does not take advantage of pre-ordering online before arriving to the airport. Global Shoppers referred one of the worst things about shopping at airports is the lack of time to choose between the varieties of offerings. This functionality would allow to check the available stock before arriving to the store avoiding the stress of choosing the products already at the PoS. Moreover, it would significantly reduce the crowd inside the stores, another major problem referred by the respondents. Therefore, a way to solve some of the Global Shoppers' discomforts would be to facilitate and promote pre-ordering online. Most passengers are somewhat loyal to the brand they use to buy which means they may already know which brand they want to buy before arriving to the store.

Another major result concerns the self-service stores. Respondents showed neutral results concerning the referred variable which is not in accordance with the expected ones. Aid in stores was estimated to be a valuable benefit instead of a neutral feature in stores. Moreover, only a few portion of the sample doesn't enjoy self-service in stores. With the results from this two opposite variables, a clear recommendation would be to adapt the offer to the traveller profile and develop stores that allow self-service.

There was a significant difference between genders in several variables analyzed in the questionnaire. In this sense, it may be valuable for brands to organize its products' categories for female and men differently. From the sample, men look for more varied categories while women distinguish themselves by buying much more Cosmetics & High-end Fragrances. Brands may discretely present different categories to each group gender in order to turn the shopping process more efficient. Another important dimension is the way brands communicate with each group. Women may be more extreme and demanding concerning brands' credibility, which must be something to take into account for future Global Shoppers' approach.

As far as ads at airports are concerned, the sample showed that Global Shoppers do not pay much attention at ads when travelling. Some improvements may be done to catch passengers' attention at airports. The JCDecaux 2013 study shows that the more powerful brand engagement ads were digital (interactive, color and changing ads generate impact and involving), experimental (surprise, excite and entertain, develop a lasting impression) or sponsored services (indulgent, useful, free and fun ex: charging stations, clocks, free Wi-Fi, TVs). This three pillars may shape the path through which brands can innovate in the travel retail market.