

NEW

# THE NEW NOMADS

## LUXURY TRAVELERS & DUTY FREE SHOPPING PER CATEGORY



GAME CHANGERS





# THE NEW NOMADS

A new tool to better understand duty free shoppers from 6 countries:  
**US, UK, France** - mature luxury markets travelers & **China, Korea, Russia** - global luxury shoppers

A new international tracking survey offering more **dynamic data** on luxury travelers compared to the perspectives of the WLT data, with an enriched qualitative approach exploring **prospective trends** through semiotic analysis based on open-ended question & expert interviews.



# THE NEW NOMADS

A new tool to better understand directly consumer mindset per category



based on questions per category



**ALCOHOL  
CATEGORIES:  
WINES, CHAMPAGNE  
SPIRITS**



**GOURMET FOOD**



**FASHION CATEGORIES:  
READY-TO-WEAR, SHOES  
HANDBAGS, EYEWEAR**



**WATCHES**



**BEAUTY CATEGORIES:  
MAKE-UP, SKINCARE,  
PERFUME**



## Understanding luxury travelers' moods, expectations, purchase funnels

### Define current luxury travelers

- Who are the luxury travelers from these 6 countries?
- Where are they traveling? Why ? How ? How long ?
- What do they buy abroad ? What do they buy in Duty Free Shops ?

### Understand their state of mind per category

- Where do they prefer to buy ?
- Which products do they buy ? Which brands?
- Values associated with duty free luxury buying ?

### Determine the factors that influence their purchase behaviors

- How do they prepare their purchase? Who influences or advises them?
- What importance do apps hold in their information search and purchase process?
- What special expectations do they have for duty free shops ?
- Prices ? Experiences ? Gifts ? Authenticity ?
- What are they thinking about their last purchase experience abroad?



A scenic landscape at sunrise or sunset. The sun is low on the horizon, casting a warm orange glow across the sky and reflecting on a thick layer of clouds that fills the valley. In the foreground, tall grasses are silhouetted against the bright light. The mountains in the background are also silhouetted, creating a layered effect.

# METHODOLOGY

*Quant & Qual research*

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## Quant & Qual research

A precise analysis of today's luxury travelers expectation per category with new and relevant insights that can be rapidly activated

*To measure & compare*

**QUANTITATIVE  
SURVEY IN 6 COUNTRIES**



*To feel & inspire*

**SEMIOTIC ANALYSIS  
ON THEIR DUTY FREE  
SHOPS EXPERIENCES**



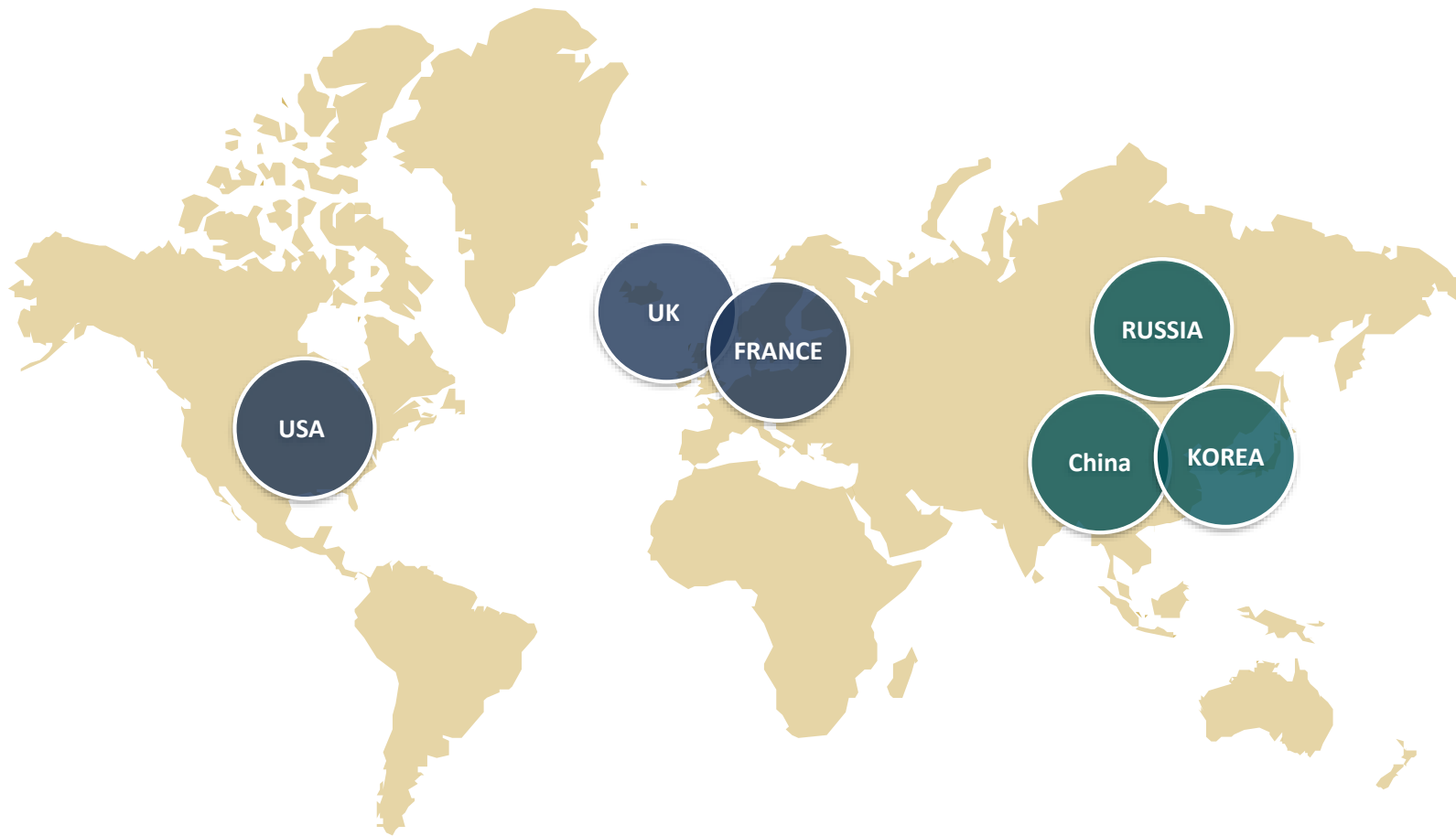
*To anticipate the future*

**DESK + EXPERTS INTERVIEWS  
ON PROSPECTIVE TRENDS**





## Step1| Quantitative study covers 6 countries in 2017



- **6 countries covered**  
China, Korea, Russia, USA, France, UK
- **3 000 interviews**  
500 per country  
People aged 18 to 65
- **Representative samples** of the richest travelers past 12 months, luxury buyers
- **Fieldwork:** November 2017





## Step1 | About the quant questionnaire

### Screener & socio-demographic questions

- ✓ **What are their traveling conditions?**  
Leisure, business, workcations...  
Attractive areas, cities, short / long trip...
  - ✓ **Why and how to purchase in duty free shops ?**  
Categories bought, for themselves, friends, family...  
Shopping preparation and influences
  - ✓ **Specific expectations / services abroad and in a duty free shop per category ?**  
Special criteria: authentic luxury goods, exclusive products, prices...  
Specific uses of the smartphone aboard  
In store special expectation: languages, friendly salespeople, services...
- ★ At the end, **their feeling about their last duty free shopping experience** (Open-ended question)





## Step2 | Semiotic analysis based on consumers spontaneous expression

**OPEN-ENDED QUESTION** = Thinking of the last occasion you bought luxury in a duty free shop please describe your shopping experience, the situation, your feelings, mood and the context around this purchase.

*You can upload any pictures to illustrate this last occasion.*

**Consumers express themselves** with complete freedom, more spontaneous answers, which are rich and varied in terms of form and content. It also provides the respondent with the possibility to illustrate a point or argument through pictures or videos.

## Process:

- ✓ Initially, the answers are analyzed with a quantitative methodology.
- ✓ Then a semiotic analysis is carried out on all the verbatim and uploaded images traveling luxury consumers.



## Step3 | Desk research + Expert Interviews to understand the future

- ✓ In order to **bring further depth to quantitative consumer insights**, the strategic planning team regularly carries out **desk research, combines with interviews with experts** from specific markets.
- ✓ Many studies are published on “the Travel Boom” for a few years, and we think that comparing and contrasting their insights with experts interviews will be really interesting... and will allow us beginning to **anticipate future consumer expectations** as well as **potential in-store experiences** and **innovative services**.
- ✓ In the context of the “**New Nomads**” research, we think that **3 expert interviews** on the travel evolution will allow us to **give a prospective dimension** to the study, by comparing their opinions, their visions and their sources on the international luxury travelers market, **today and tomorrow**.
- ✓ What’s more, different profiles will be considered in order to **obtain a complementary and balanced mix of perspective** (tourism professional, luxury travel agencies or websites, travel data experts, stores designers, pure players developing new services...)





# RESULTS & ANALYSYS

*Quantitative data & Prospective view*

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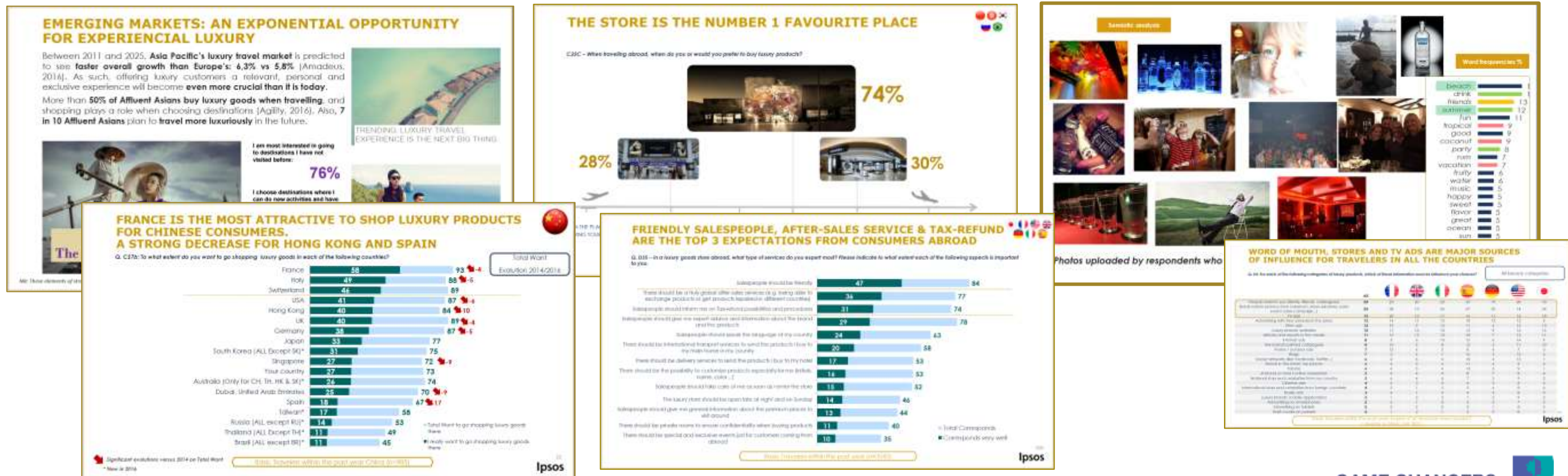
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## Quantitative data & sensitive prospective view

With each country having its own culture on the luxury market and travel practices, the results will be analysed globally but with specific zooms on the three main areas: China, US, France and UK.

Fictional example



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## Pricing Table

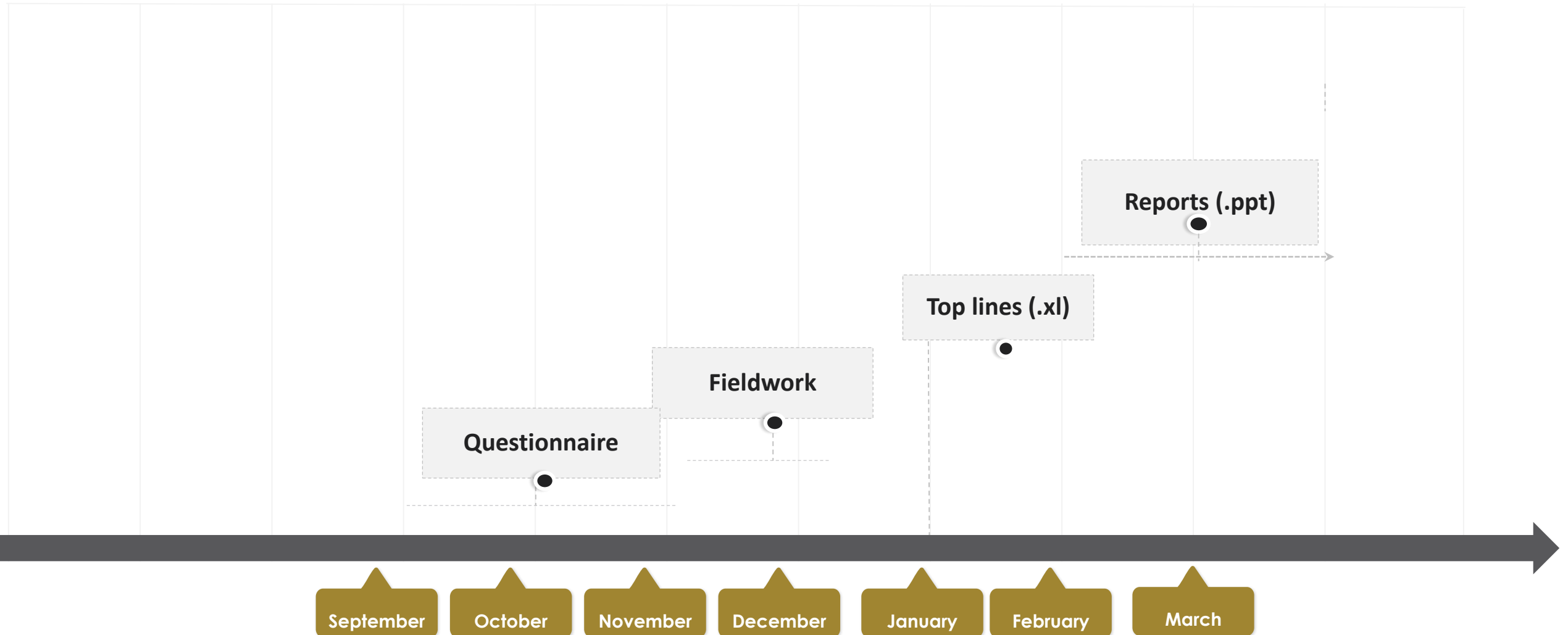
THE NEW NOMADS REPORT Including Quant & Qual research on the luxury travelers from China, Korea, Russia, US, UK and France	
All countries	20 000 € before VAT

*All options include:*  
***The strategic planning analysis + 1 oral presentation***

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## Time table

It is possible to subscribe at **any stage**





A woman with blonde hair, wearing a wide-brimmed straw hat and a black and white striped dress, is lying down. Her legs are raised and bent at the knees, with her feet pointing towards the top left corner of the frame. She is resting her head on a dark, textured surface, possibly a bag or a piece of furniture. The background is a teal-colored wall with a framed picture hanging on it. The overall mood is relaxed and stylish.

## THE TEAM

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## Strategic Planning: a luxury “hub” at Ipsos

Our team has a unique strategic planning approach, carrying out studies that combine several methodologies; associating Ipsos studies and data with daily market monitoring:



**Traditional quantitative studies**



**Strategic Planning**, combining our **daily competitive monitoring**, **semiotics** and **expert analysis** of key insights (sociological and semiotics approaches)



**Collaborative thinking** with other Ipsos divisions, agencies, associations and brands

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## The team



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**This document has been designed according to Ipsos Quality standards.**

**It was reviewed and approved by:** *Françoise Hernaez Fourrier – Head of Dpt*



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## Quant methodology



### SAMPLING METHOD

- Recruitment from a representative sample of men and women aged 18-65 belonging to TOP 50 income



### TARGET

- Per country: 500 international travelers 12 past months, belonging to TOP 50 and aged 18-65 y.o., *(incidence 10-20% of 18-65 y.o. depending on the countries )*



### DATA COLLECTION

- Online
- With Ipsos Access Panel
- 20 min questionnaire, one open-ended question, device agnostic, identical in all countries



### STATISTICAL ANALYSIS

- Weighted sample to match quotas

## ABOUT IPSOS

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Ipsos ranks third in the global research industry. With a strong presence in 87 countries, Ipsos employs more than 16,000 people and has the ability to conduct research programs in more than 100 countries. Founded in France in 1975, Ipsos is controlled and managed by research professionals. They have built a solid Group around a multi-specialist positioning – Media and advertising research; Marketing research; Client and employee relationship management; Opinion & social research; Mobile, Online, Offline data collection and delivery.

Ipsos is listed on Eurolist - NYSE-Euronext. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

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At Ipsos we are passionately curious about people, markets, brands and society. We deliver information and analysis that makes our complex world easier and faster to navigate and inspires our clients to make smarter decisions.

We believe that our work is important. Security, simplicity, speed and substance applies to everything we do.

Through specialisation, we offer our clients a unique depth of knowledge and expertise. Learning from different experiences gives us perspective and inspires us to boldly call things into question, to be creative.

By nurturing a culture of collaboration and curiosity, we attract the highest calibre of people who have the ability and desire to influence and shape the future.

“GAME CHANGERS” - our tagline - summarises our ambition.

## FIND US

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