

## Heathrow Shopping Purchase Motivations – Briefing notes

### July 2023

### Introduction

Heathrow wishes to understand what is motivating passengers to shop with them in 2023 to feed into plans for the future. The insight is looking to measure:

1. How well passengers understand tax free/duty free at Heathrow and how it can be communicated
2. What drives passengers to shop at Heathrow and how does this differ across passenger types/categories?
3. What is the optimum discount level to maximise on-airport sales?

### What we have done so far

We have done a lot of work to ensure that we are measuring what's relevant to passengers, and being considerate of each outlet and their products sold. This includes extensive questionnaire design with key stakeholders and pilot studies that have been undertaken in Heathrow.

The piloting exercise and interviewers who worked on it have helped us to refine the questionnaire so that it flows well and is the right length.

### Overview of the survey

- We are looking to interview **browsers (considered products but didn't purchase) and buyers** across a range of stores in Terminals 2-5
- You will be carrying out **store exit interviews** to catch browsers and buyers as they leave each store. This way they'll be able to give us detailed feedback on their experience in the store
- We want a **range of browsers and buyers** across gender age, purpose of trip and residency
  - When considering age, we would like to hear from passengers aged 14-17. When interviewing this group, **please ask for their age and parental permission before you interview unless they are aged 16/17 and travelling alone**

- Quotas have been set by product categories and by terminal as follows:

Browsers and Buyers		Soft Quota by Terminal			
		T2	T3	T4	T5
Liquor	300	75	75	50	100
Fragrance	300	75	75	50	100
Skincare / Cosmetics	300	75	75	50	100
Food / Confectionery	175	40	40	40	55
Sunglasses	200	40	60	30	70
High street fashion	175	55	55	30	35
Affordable luxury fashion	200	40	60	30	70
Technology/electronics	200	40	50	40	70
Watches/jewellery	175	35	44	35	61
Gifts and souvenirs	200	50	50	50	50
Essentials (newsagents)	150	35	40	35	40
Essentials (pharmacy)	150	30	40	40	40
Luxury Fashion	175	25	50	50	50

- Some stores will be busier than others, so we would like you to get interviews with a **range of different categories in your shift**, rather than just focusing on one category
- We have identified different retailers to qualify for each product category – see list below which confirms which retailers are relevant. Please **only interview at the stores below**

Category	Relevant Retailers
Liquor	<ul style="list-style-type: none"> <li>WDF</li> </ul>
Fragrance	<ul style="list-style-type: none"> <li>WDF</li> </ul>
Skincare / Cosmetics	<ul style="list-style-type: none"> <li>WDF</li> </ul>
Food / Confectionery	<ul style="list-style-type: none"> <li>WDF</li> </ul>
Sunglasses	<ul style="list-style-type: none"> <li>WDF</li> <li>Sunglasses Boutique</li> <li>Sunglasses Hut</li> </ul>
High street fashion	<ul style="list-style-type: none"> <li>Accessorize</li> <li>JD Sports</li> <li>Superdry</li> </ul>
Affordable luxury fashion	<ul style="list-style-type: none"> <li>Boss</li> <li>Kurt Geiger</li> <li>Lacoste</li> <li>Paul Smith</li> <li>Reiss</li> <li>Ted Baker</li> </ul>
Technology/electronics	<ul style="list-style-type: none"> <li>In-Motion</li> </ul>
Watches/jewellery	<ul style="list-style-type: none"> <li>Cartier</li> <li>Hublot</li> </ul>

	<ul style="list-style-type: none"> <li>• Rolex</li> <li>• Tiffany &amp; Co</li> <li>• Watches of Switzerland</li> </ul>
Gifts and Souvenirs	<ul style="list-style-type: none"> <li>• WDF</li> <li>• Discover London</li> <li>• Fortnum &amp; Mason</li> <li>• Glorious Britain</li> <li>• Hamleys</li> <li>• Harrods</li> <li>• Harry Potter Shop</li> <li>• Rituals</li> </ul>
Essentials (newsagents)	<ul style="list-style-type: none"> <li>• WHSmith</li> </ul>
Essentials (pharmacy)	<ul style="list-style-type: none"> <li>• Boots</li> </ul>
Luxury Fashion	<ul style="list-style-type: none"> <li>• Aspinall of London</li> <li>• Bottega Veneta</li> <li>• Bulgari</li> <li>• Burberry</li> <li>• Dior</li> <li>• Fendi</li> <li>• Gucci</li> <li>• Hermes</li> <li>• Moncler</li> <li>• Michael Kors</li> <li>• Orlebar Brown</li> <li>• Prada</li> <li>• Saint Laurent</li> </ul>

- Make sure that you **interview at a range of retailers for each category**, rather than just focusing on one
- **If interviewing at WDF:** Please interview as close as possible to the exit of the main WDF store in the departure lounge. Please rotate on the threshold of the store to ensure a good spread of categories are obtained
- **If interviewing at WDF Terminal 3:** Ensure that passenger has browsed or purchased in the store and is not just passing through after security
- **If interviewing at Harrods Terminal 5 –** Ensure you are positioned at Harrods gift store (Near the B gates) not their luxury/clothing store
- For non-WDF categories, please prioritise categories **bought** over browsed to start with where possible

## The questionnaire

The questionnaire is structured as follows:

- Section A – Confirmation of terminal, store interviewing at
- Section B – Intro
- Section C – Main questionnaire
- Section D – Profiling

### Section A:

- This includes standard information including details of the Terminal and retailer where the interview is being conducted
- Please enter this before the interview is conducted to ensure it can start straight away

### Section B:

- Read the instructions carefully to ensure you are situated in the right position at the different outlets to intercept passengers
- Make sure interviews are being conducted where passengers can be easily heard
- As highlighted earlier, please ask permission to interview under 18 passengers (unless aged 16/17 and travelling alone), and ask for their age
- Make sure to read out the instruction at the beginning, and highlight the confidentiality of the data

### Section C:

- During the course of fieldwork, pay attention to how many browsers and buyers are being interviewed in each category to ensure quotas can be filled
- **Q5** – Make sure the definition of 'browsing' is made clear, as it is important that passengers are genuinely considering items rather than just glancing at them as they walk by
- **Q5 and Q6** - Show the list to the passenger
- **Q7a/b** – Make sure the scale is clearly highlighted
- **Q8-Q10b** For most of these questions, **please show the passenger the screen** to help them answer the question easily
- **Q11a & Q11b** – for these questions **do not show the passenger the screen** as we would like their spontaneous answers
- **Q11c** – you can show the screen again here
- **Q12c/Q13c** – **!!Obtaining pricing figures is very important for this research. Try your best to get figures or estimated figures from the passenger. Probe further if necessary!! Even their best estimate is better than no answer here. Enter the amount they say in pounds and pence.**
- **Q12 onwards** - If the respondent bought/browsed more than one product, make clear the focus is on the **most expensive item**

- **Q14-20** – In most of these questions the passenger should see the screen as to help them answer the questions
- **Price Sensitivity (Q23a/Q23b/Q24a/Q24c)-** **!!Obtaining pricing figures is very important for this research. Try your best to get figures or estimated figures from the passenger. Probe further if necessary!! Even their best estimate is better than no answer here.** Enter the amount they say in **pounds and pence**

#### **Section D:**

Profiling section including a lot of the questions you are used to seeing on other surveys. Let the passenger know that you are nearly finished

Finally, to complete the interview, record the passenger's gender.