



TIMES OOH™

Mumbai Airport Passenger Profiling Study

Agenda

1 Introduction

2 Research Design &
Methodology

3 Traveler Demographics

4 Travel Behavior

5 Airport Behavior

6 Advertisement Effectiveness &
Recall

7 Lifestyle & Ownership

8 Summary

01

Introductions



Mumbai: India's Commercial and Financial Capital

One of the world's
Top 10 centres
of commerce in terms of
global financial flow



Industrial Hub,
main
destination for
foreign
investment and
JVs



Home to
important
financial
institutions, such
as the RBI, the
BSE, the NSE of
India



Centre of
creativity and
consumption.
Hub for businesses
with national &
international
reach across
entertainment,
design, fashion,
tourism & jewellery



One of the
Busiest port
system in
Country
(Mumbai Port Trust
& JNPT)

Among The
**Top 15 wealthiest
cities globally**

Among The
**Top 10 cities in
terms of billionaires**

One of the fastest
growing cities in the
world in the number of
UHNWIs, expected to
double in 2015-25¹

Contributes to
**18.5%
of Foreign
tourists²**

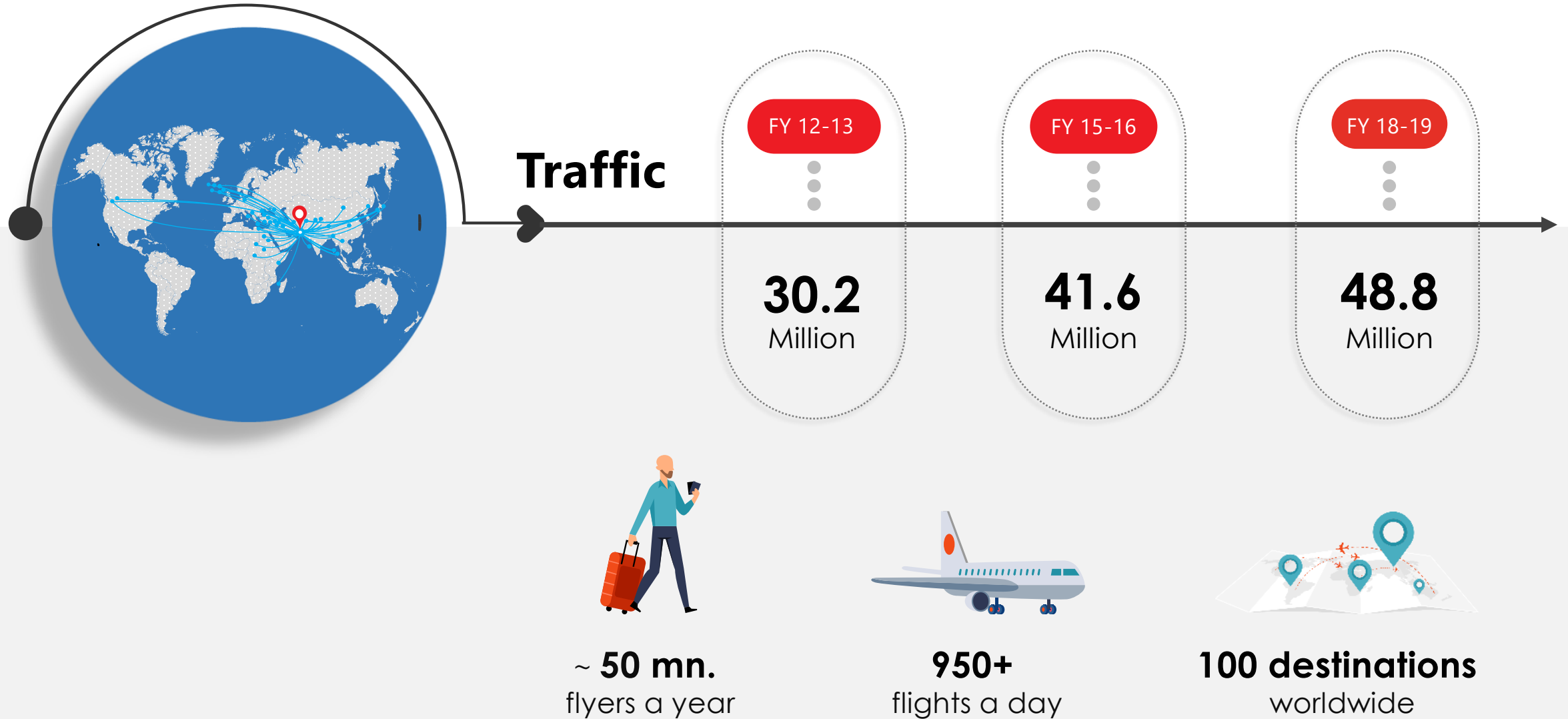
Houses multiple corporate
offices and other
organizations in various
sectors like **BFSI, Telecom,
Consumer Durables,
FMCG** and more

Rated as the **Top
real estate
destinations in
Asia³**

**Tops the physical
infrastructure
segment** amongst
all cities in India⁴

**16th most expensive
residential properties**
market in the world¹

Mumbai Airport: Gateway to Mumbai City

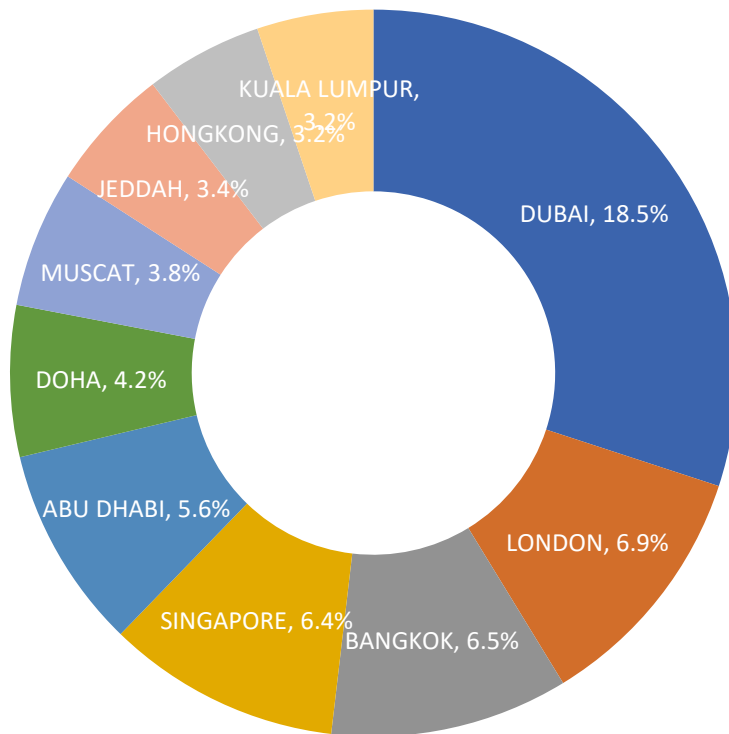


Why Your Brand Should Be Present At T2, Mumbai Airport?

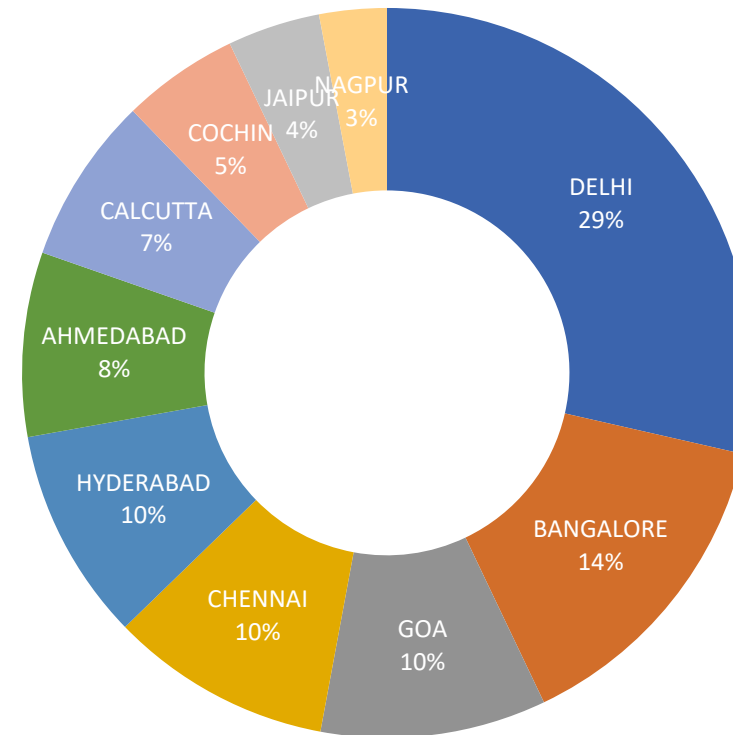
Place	People	Time
<ul style="list-style-type: none">• Mumbai Airport a perfect captive setting• Contributes close to 21% OF India's flyers• Traffic of more than 45 million passengers per year• T2- A highly sophisticated and captive media environment	<ul style="list-style-type: none">• The Indian Traveller 45% - Business Travellers 55% - Leisure Travellers• Mumbai travellers are affluent, urban , young and love to travel & shop• 73% of T2 Mumbai travellers are aged between 25-40 years• T2 - The ideal media for targeting the elite SECA + target audience	<ul style="list-style-type: none">• Airports amongst the top media on the parameter of dwel time• On an average 165 min dwell time at Int. terminal and 109 min at domestic terminal• 56% travellers recommend brands advertised at airports• T2 offers ideal dwell time and receptive target audience

Mumbai Airport Traffic

Sector wise-Top 10 International Destinations



Sector wise-Top 10 Domestic Destinations



Source: CSIA, Apr-Nov 2017 Traffic Reports

02

Research Design & Methodology



Research Design & Methodology

The objectives are:

To understand **the noticeability and recall for the advertisements** in different areas of the airport

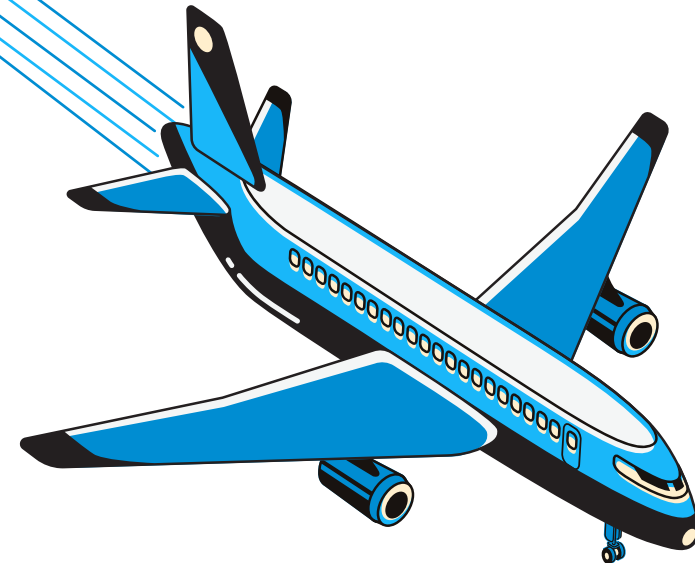
To understand the **demographic and psychographic profile** of Mumbai airport passengers

Sample size
– 1200

- Mumbai Airport T1 and T2 Terminals:
- Domestic and International passengers
 - Arrivals and Departures

Interviews were conducted between
18th February to 30th March

Quantitative Face-to-Face interviews were conducted
using CAPI (Computer Aided Personal interviewing)
devices with a structured questionnaire



Target Group:

Age Group: 18-55 yrs

Gender: Male : Female

NCCS: Any NCCS

Should be travelling from Mumbai airport (International or Domestic).

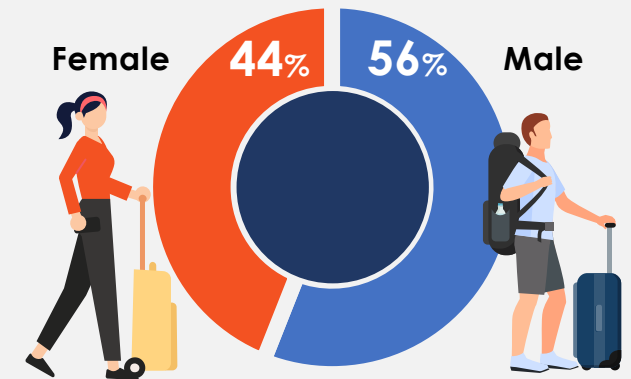
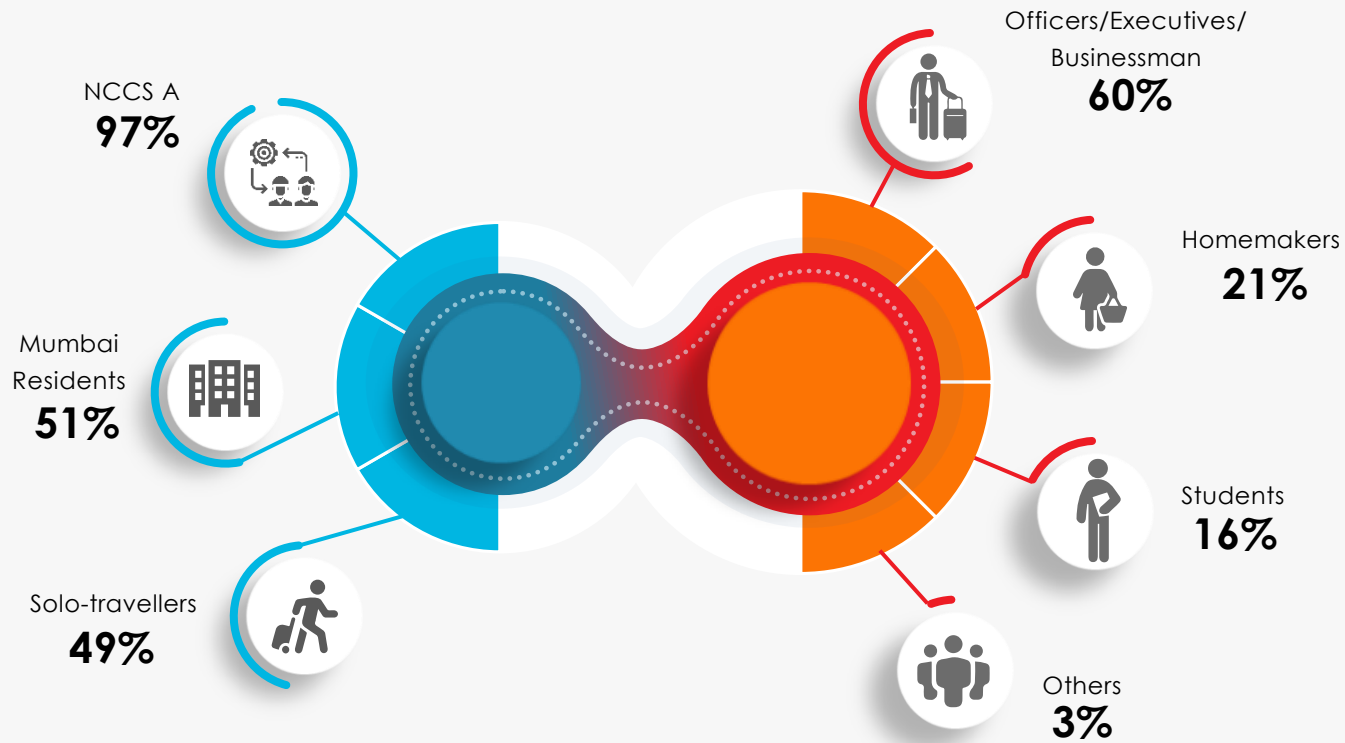
Should be an Indian (Indian passport holder if travelling International)

03

Traveller Demographics



97% NCCS A Audience, Crème de la crème of the city



Age



18-25 years
24%



25-35 years
30%



36-45 years
23%



46-55 years
23%

04

Travel Behaviour



With an average stay duration of 11 days, 3 in 5 passengers travel for leisure

Leisure
~60%



Business
~40%

International

37% Business traveler | 16.5 Average trip duration(days)

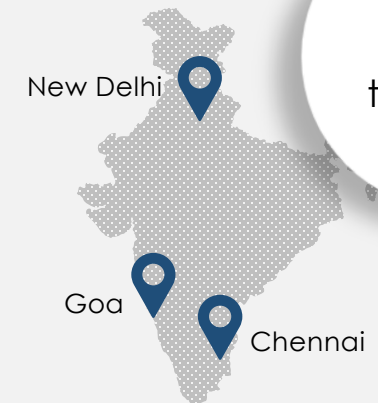
Domestic

63% Business traveler | 9.3 Average trip duration(days)

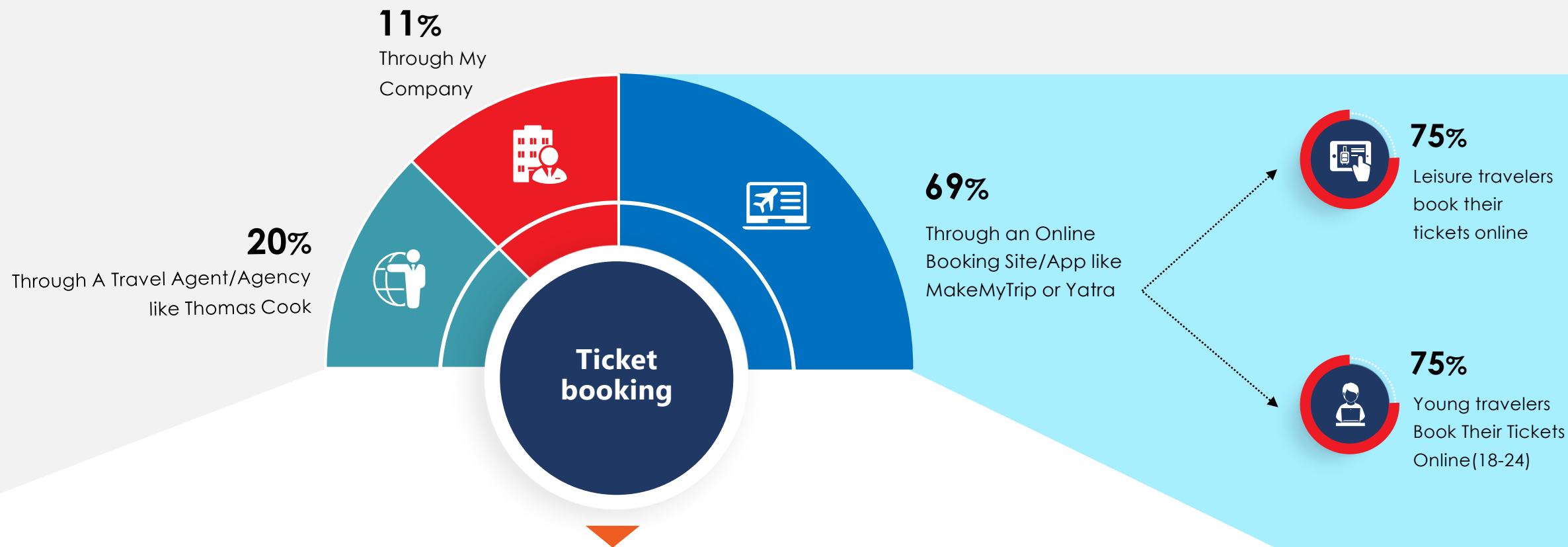
3 TOP
Countries
travelling
to/from



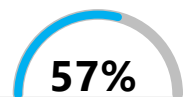
3 TOP
cities
travelling
to/from



Around 75% of Leisure travellers, Young & Domestic passengers book their tickets online



Airlines Loyalty Programme

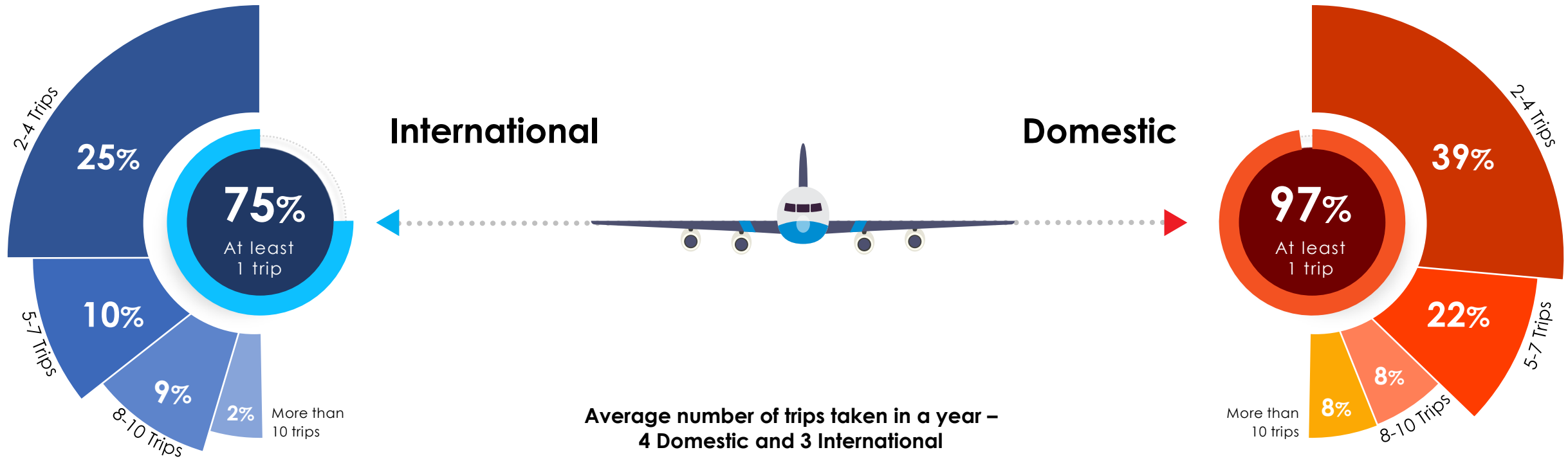


People have signed up for at least one of the airline loyalty programmes.

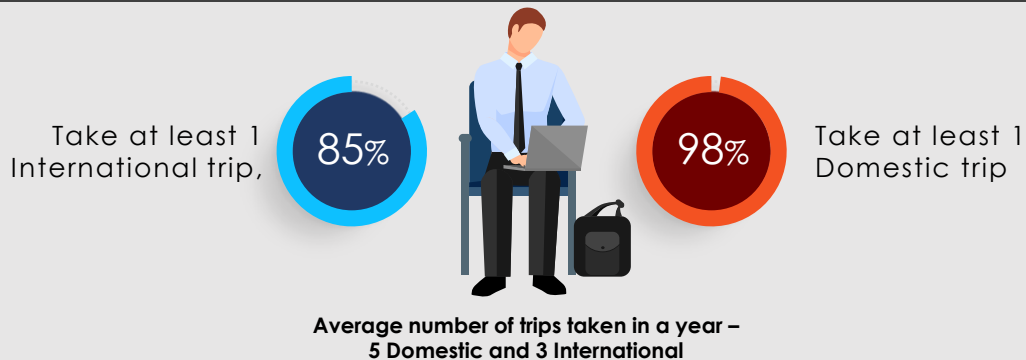


Business travellers have signed up for at least one of the airline loyalty programmes.

77% take 2+ Domestic trips, 75% take at least 1 International trip



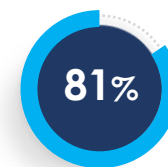
Business Travellers



Leisure Travellers



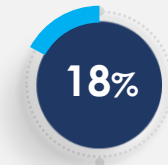
81% stay in Luxury Hotels



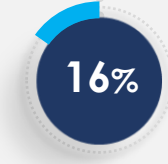
Luxury Hotel



Budget/Economy Hotel



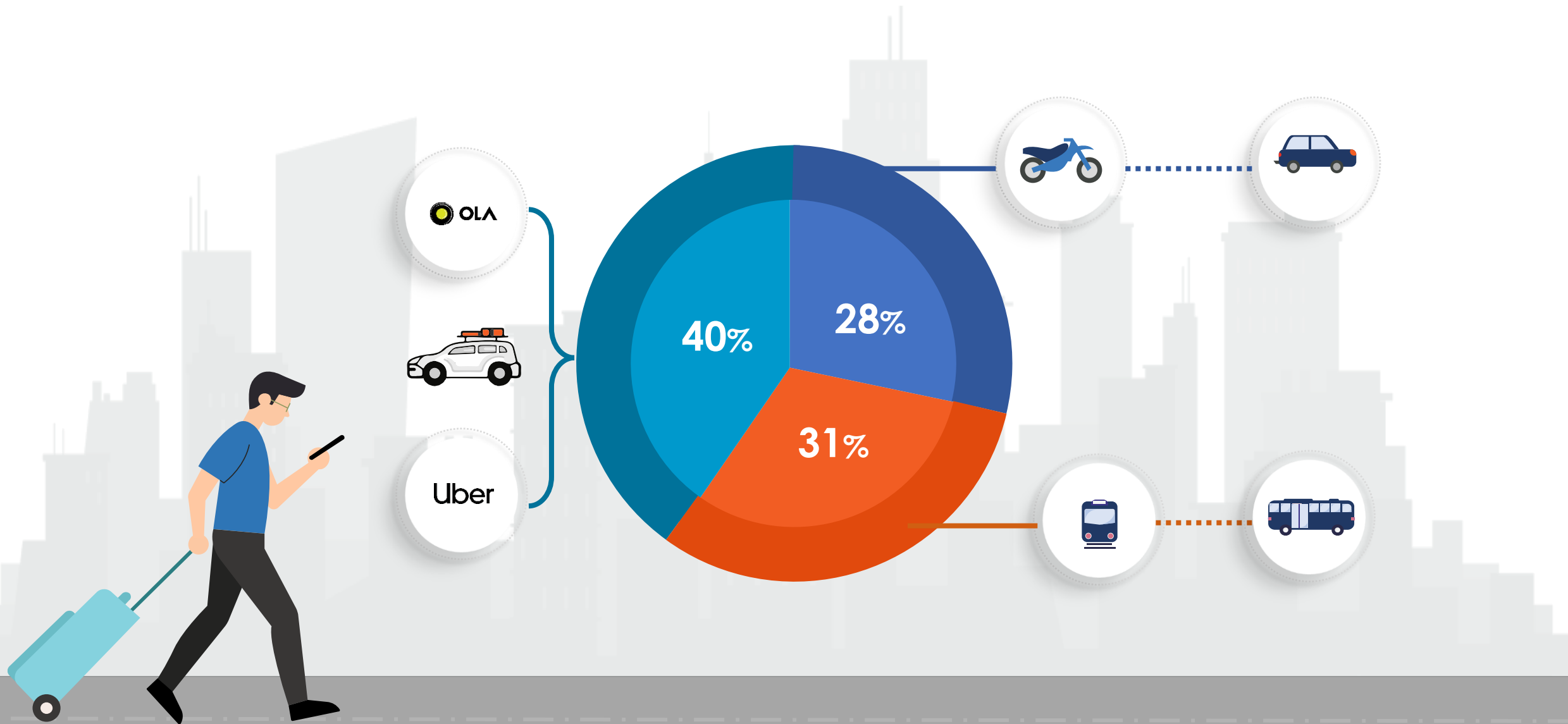
Business Hotel



Boutique Hotel



40% travelers use Uber/Ola to commute



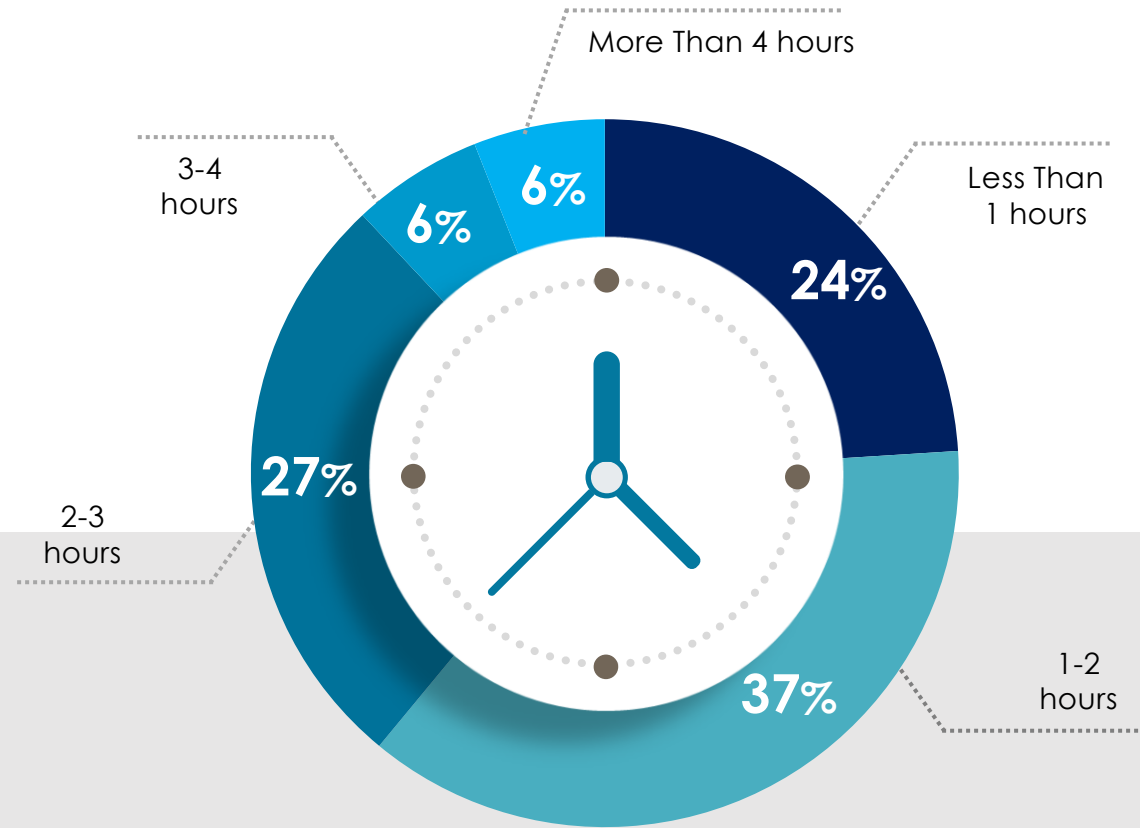
05

Airport Behaviour



3 in 4 passengers spend 1 hour + at Departure terminals

Time spent at Departure Terminal



Average Time Spent



Time spent at Departure and Arrival

Arrival



Unique opportunity to target the Passengers in a relaxed frame of mind

Departure



Around 60% passengers spend time noticing the Ads or Promo Kiosks

Average Time Spent on Major Activities Done

Looking at different formats of advertisements or visiting Promo Kiosks

59%

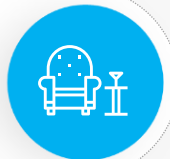
Mins 7-8



At the lounge or other recreational activities

20%

Mins 17-18



77% Eating at a restaurant or a café

Mins 18-19



43% Shopping at the retail shops inside the airport

Mins 13-14

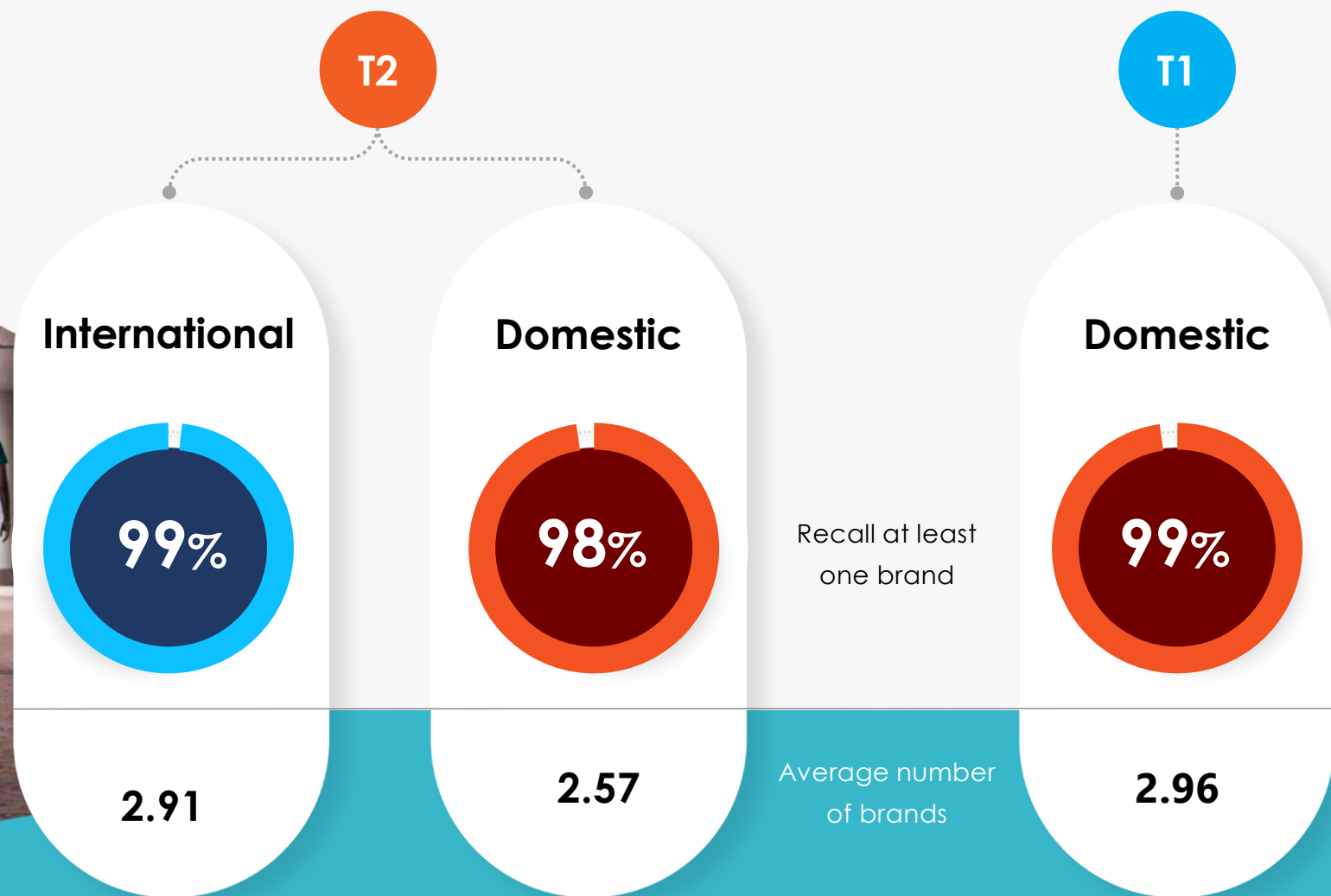


06

Advertisement Effectiveness & Recall

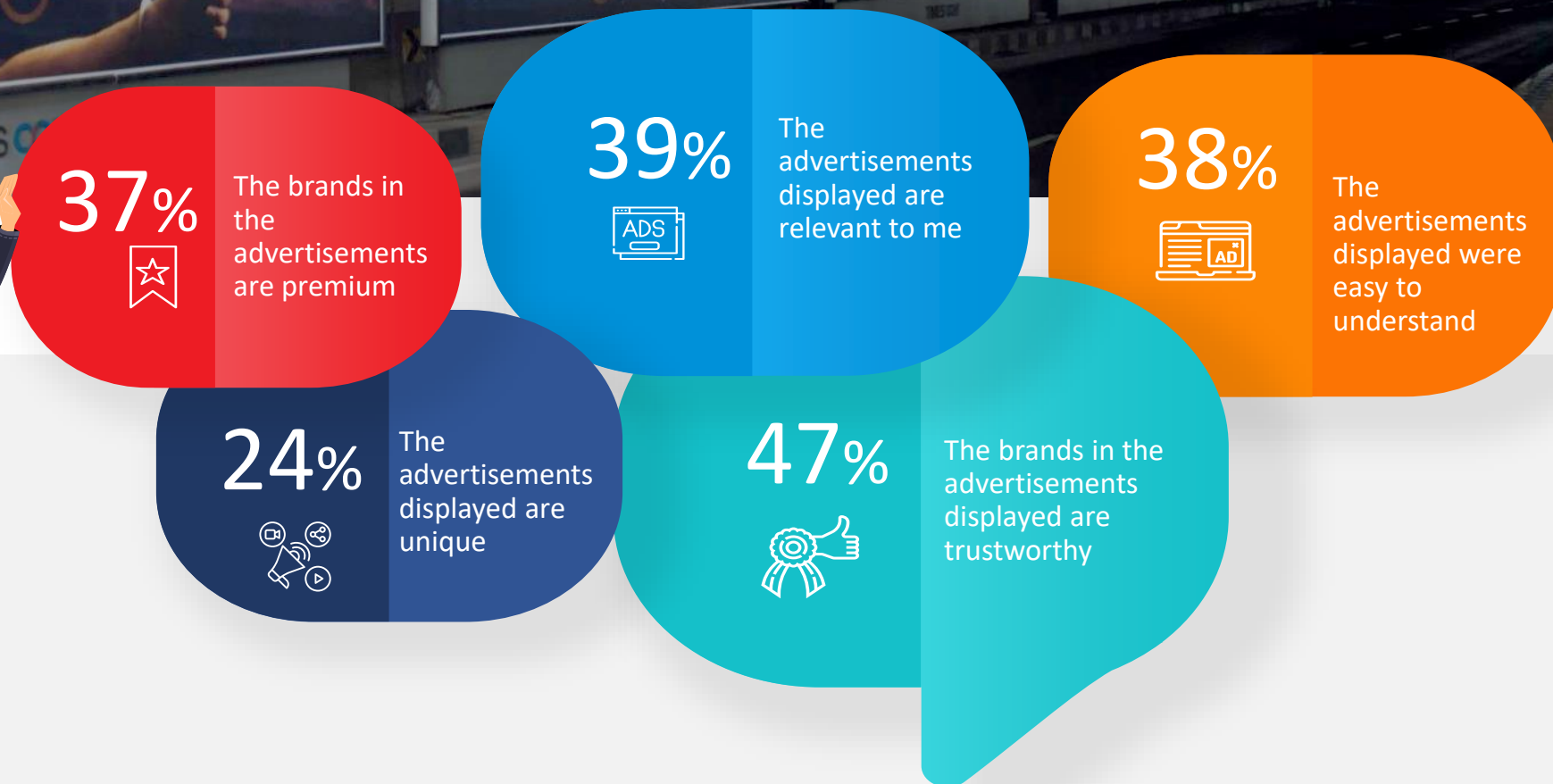


98% of Mumbai airport passengers recall seeing at least one brand in the airport



Airport advertisement adds a layer of trust and premium feel to the brands

Perception about ads at airport



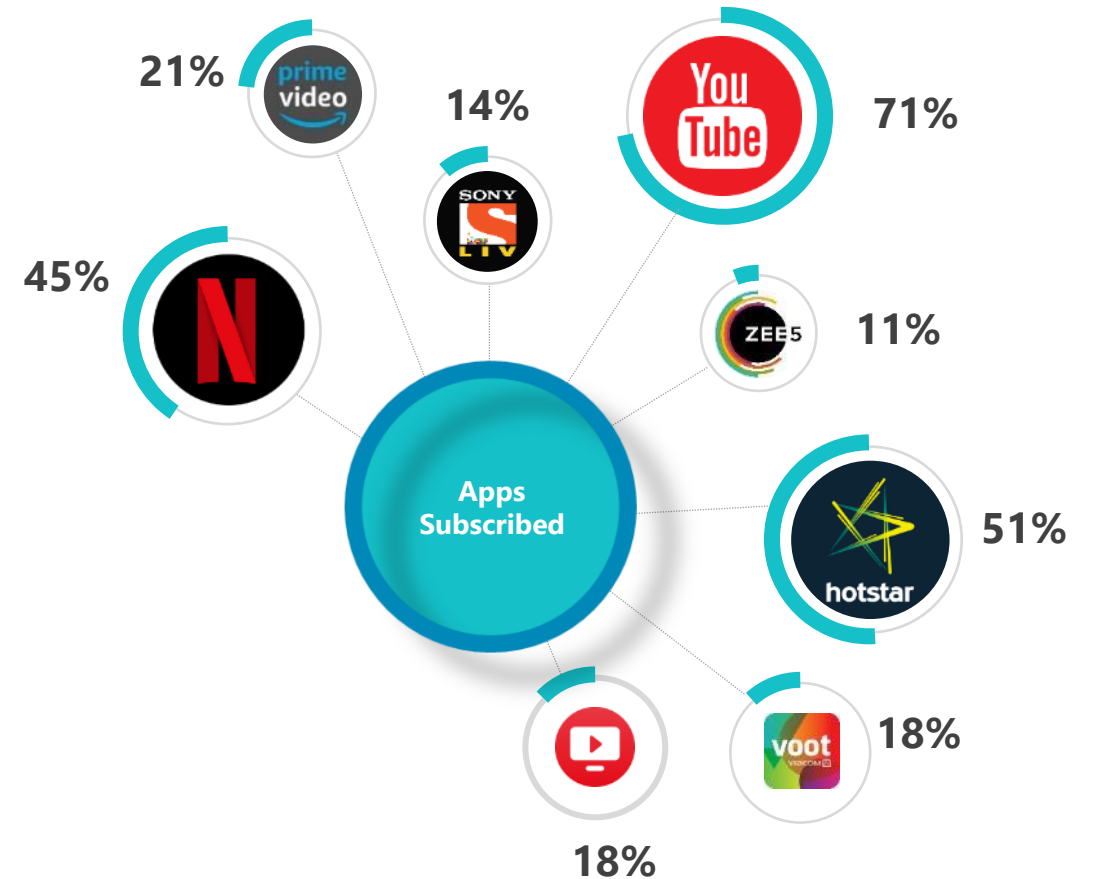
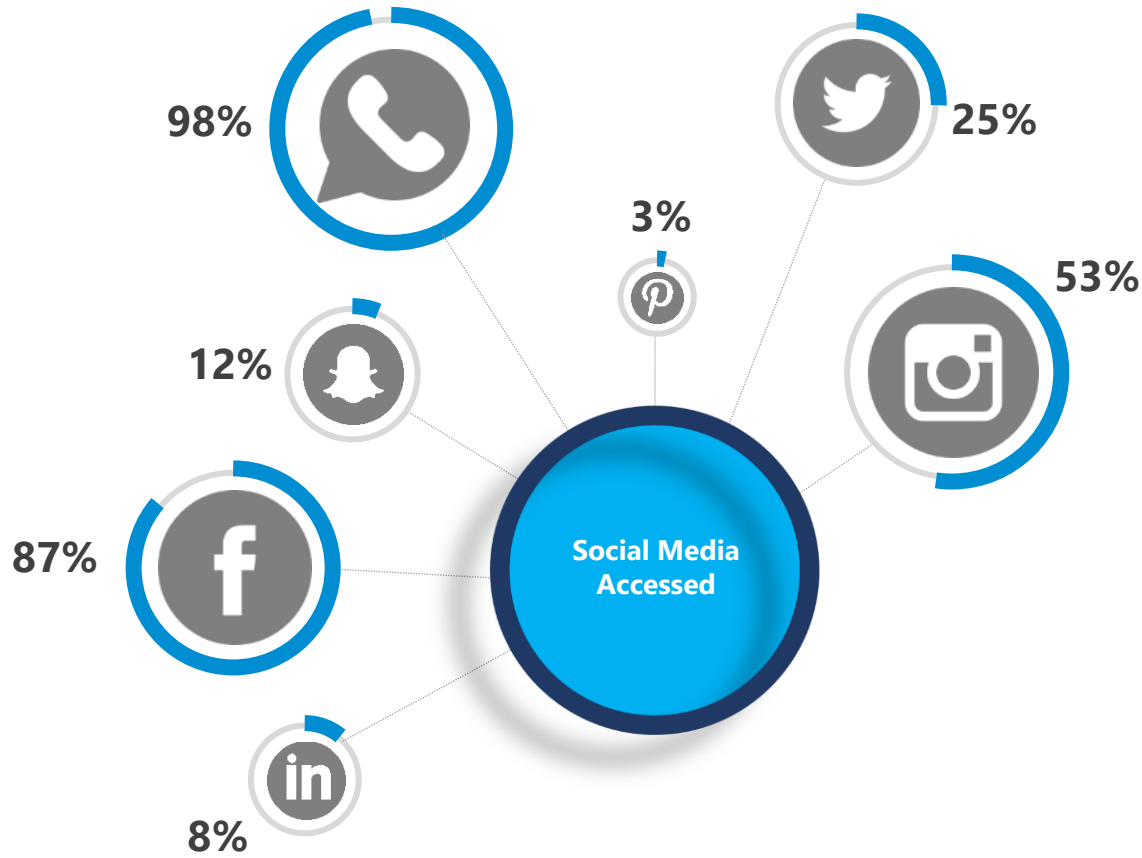
07

Lifestyle

*Online & Social Media
Behavior*



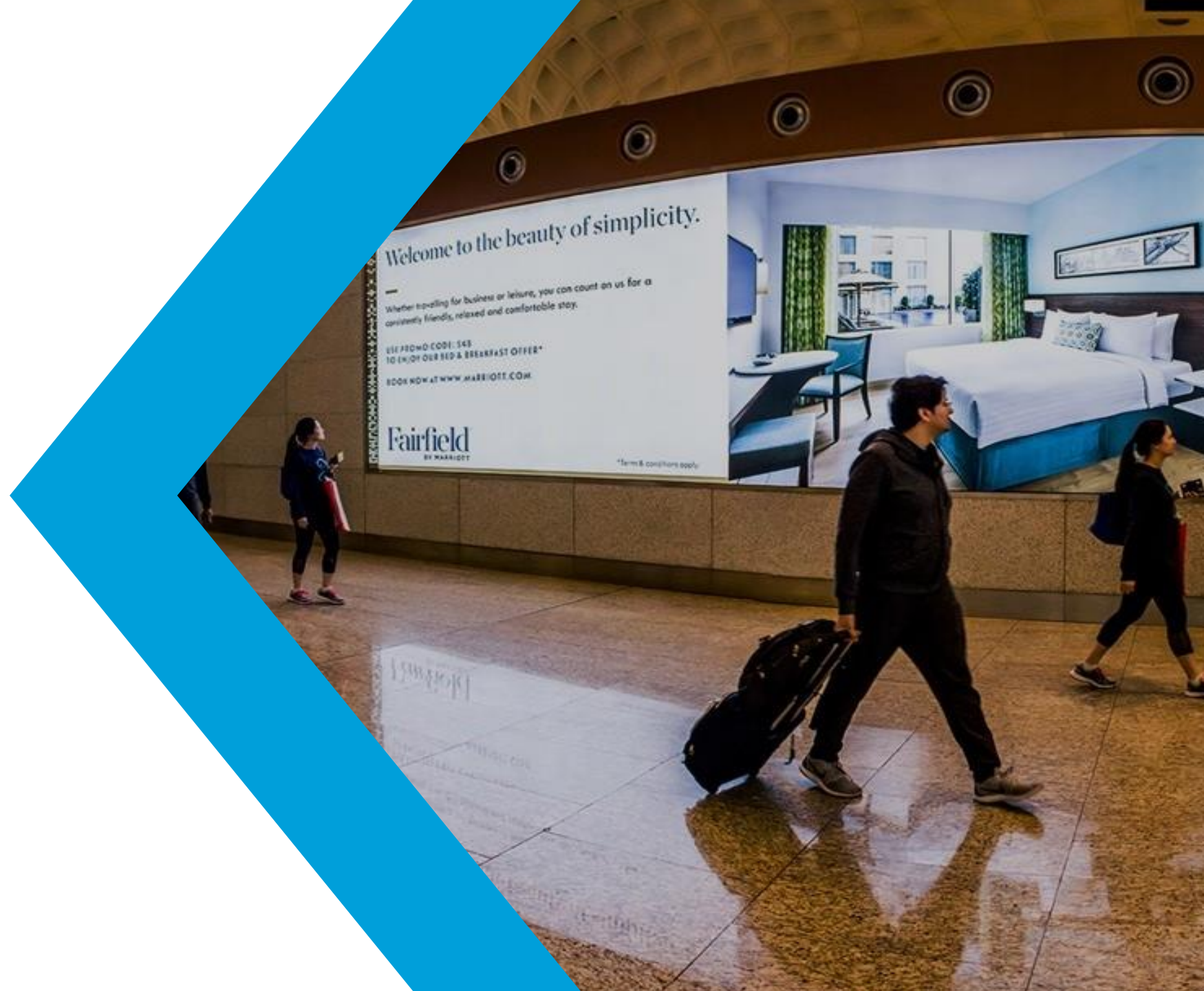
**WhatsApp, Facebook & Instagram are the Top 3 used social media platform,
YouTube, Hotstar & Netflix are the Top 3 used streaming apps**



08

Lifestyle

Shopping Behavior

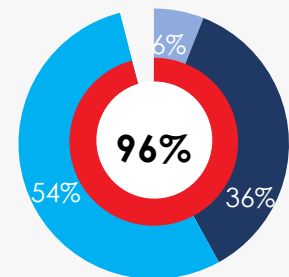


Shopping apps are the most used apps

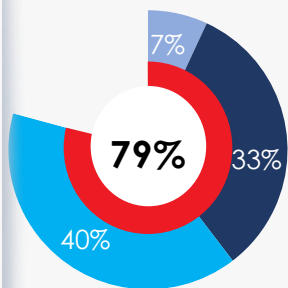


F&B and Apparel are the most purchased category but highest spends are on Fashion, Mobile & accessories & Jewelry

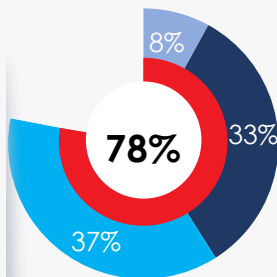
Online Offline Both



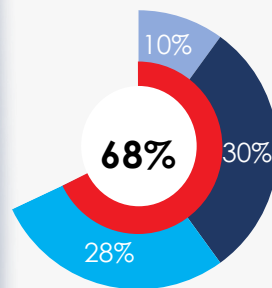
Food & Beverages



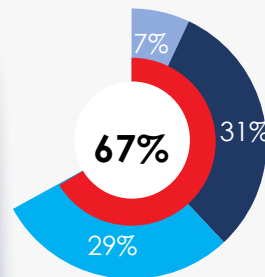
Apparel



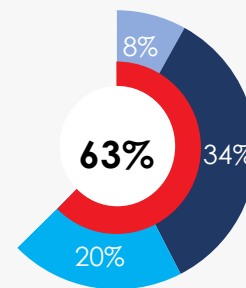
Fashion Accessories



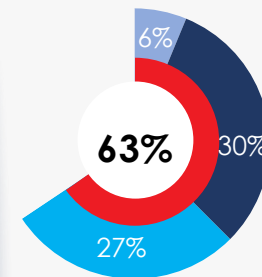
Mobile & Accessories



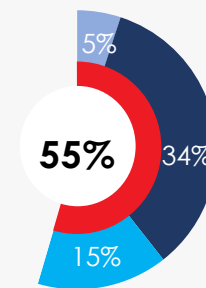
Cosmetics



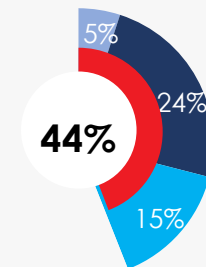
Books



Consumer Durables



Jewellery



Toiletries (incl. Baby Care)

09

Lifestyle *Ownership*

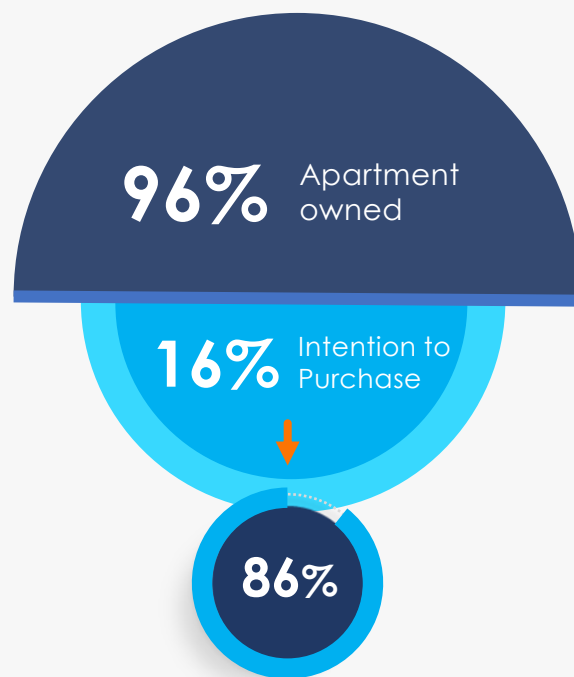


Ownership



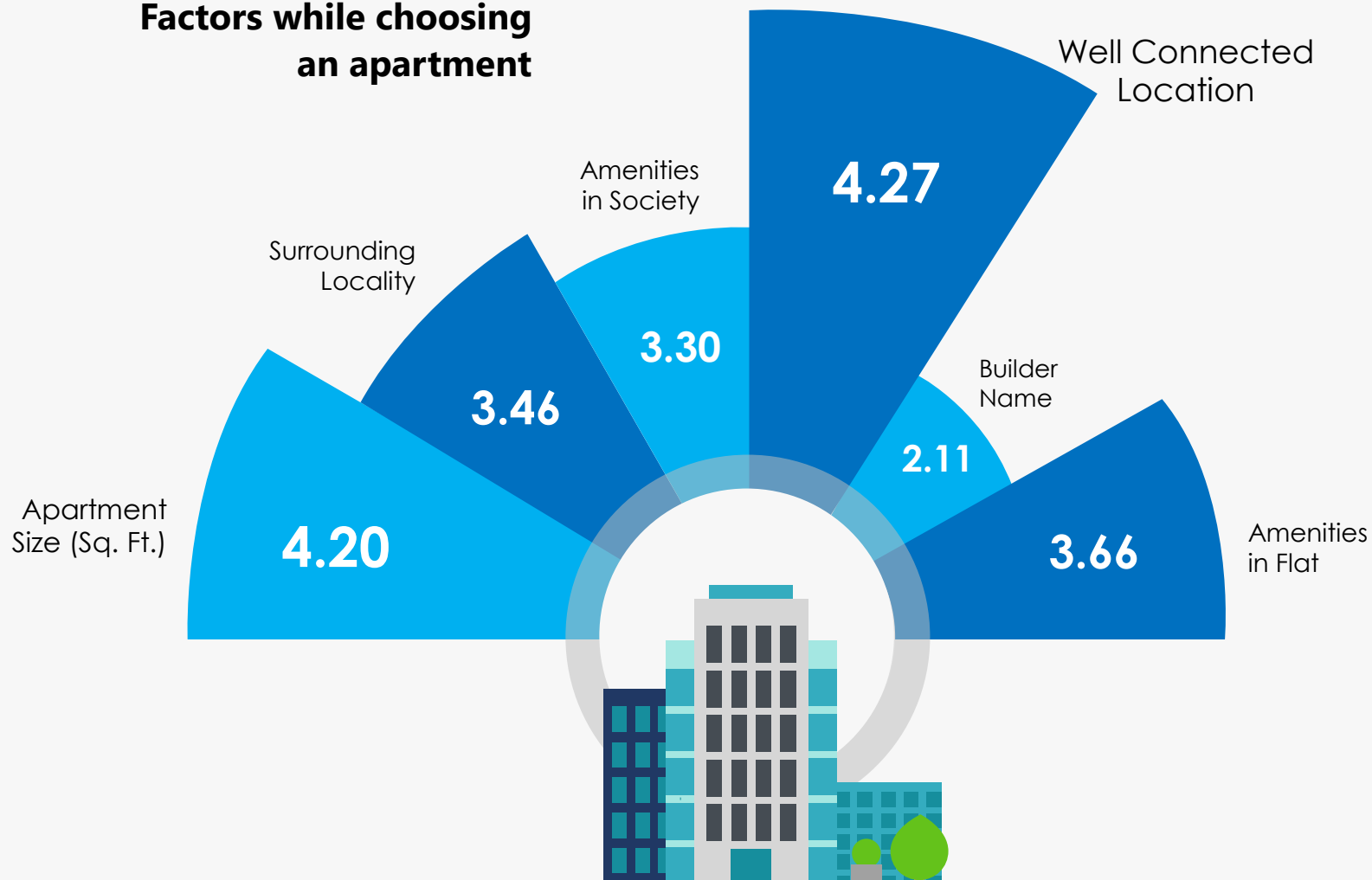
96% passengers own an apartment, 16% intend to purchase a new one with investment as the driving motivation among 86% of them

Good Location, Apartment size and Amenities inside the flat are the 3 most important factors while choosing an apartment



Main reason is 'future investment'

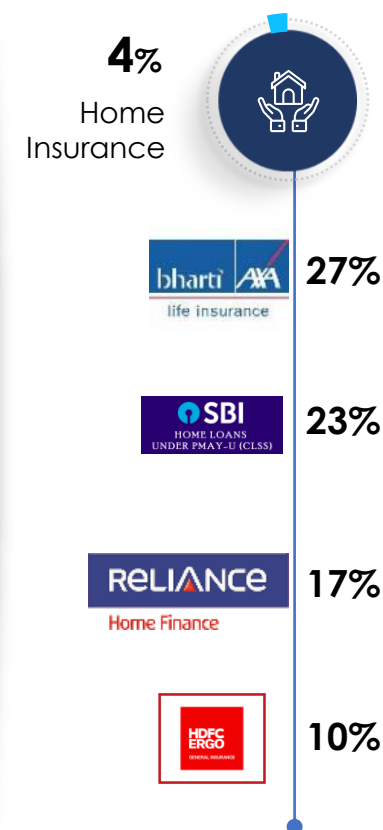
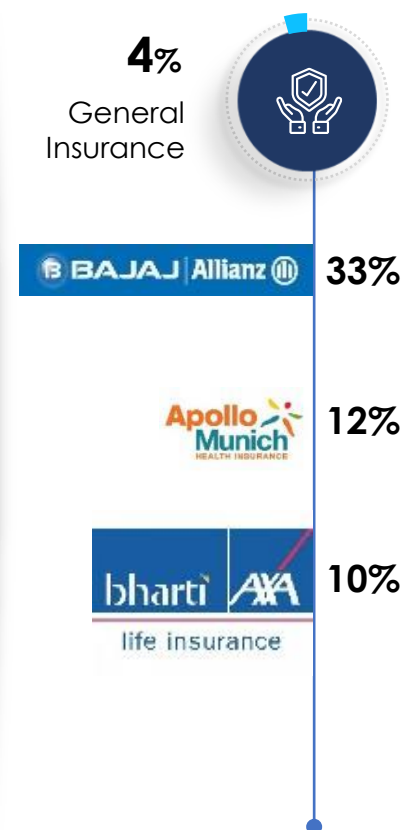
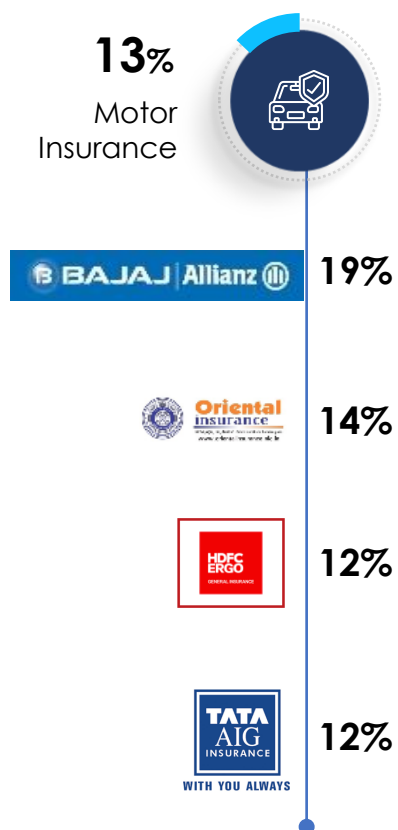
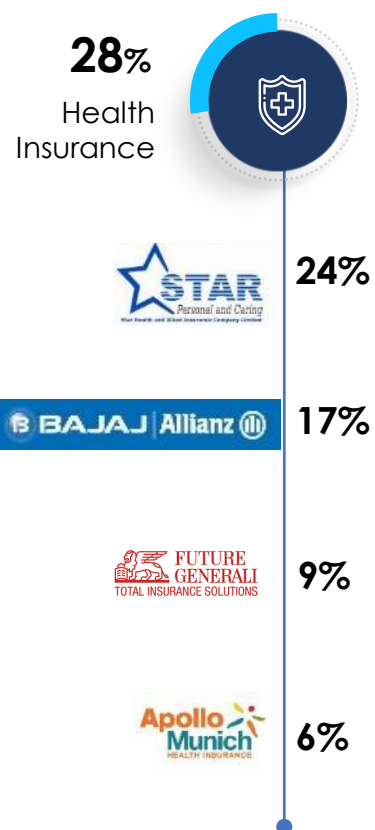
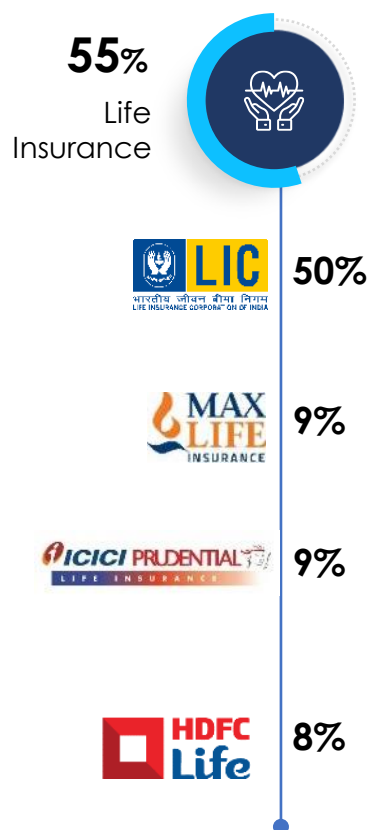
Factors while choosing an apartment



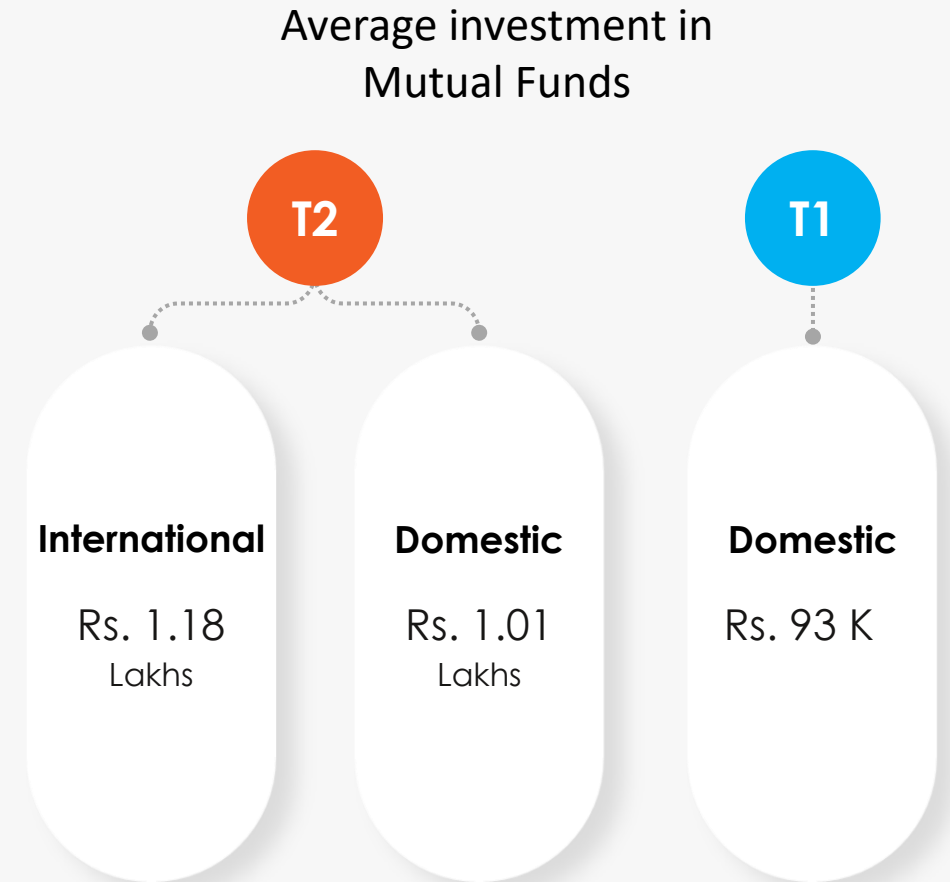
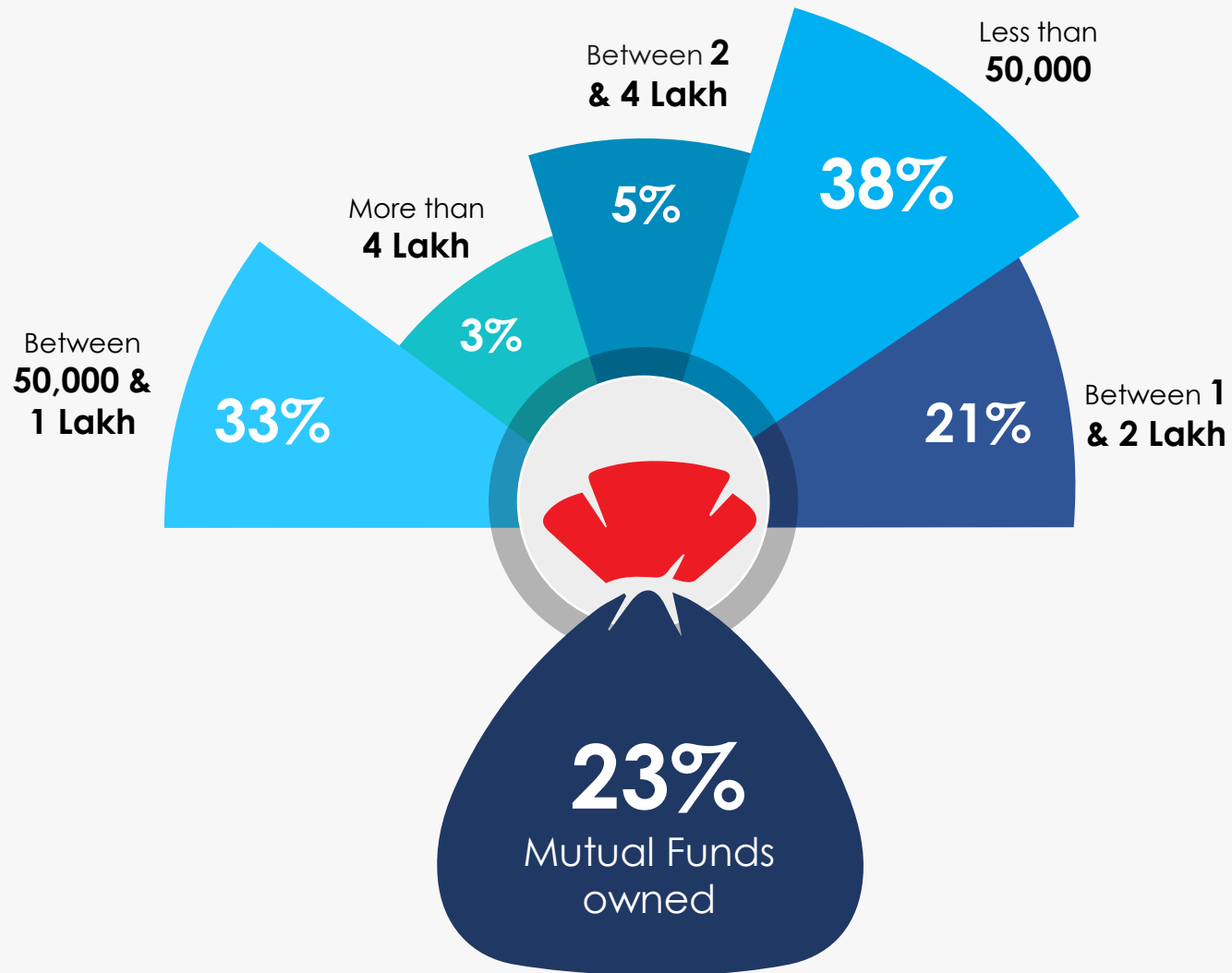
~1 in 3 passengers do not own any Insurance which exhibits a huge opportunity

Type of Insurance owned

While 35% Do not own/hold any insurance



3 in 4 have not invested in MF, Huge opportunity as average investment only 1.02 lacs / year



10

Psychographic Behavior



Traveler Interests & Behavior

**3 in 4
passengers**

like to try new things
and be updated
about the events/
occurrences
happening around

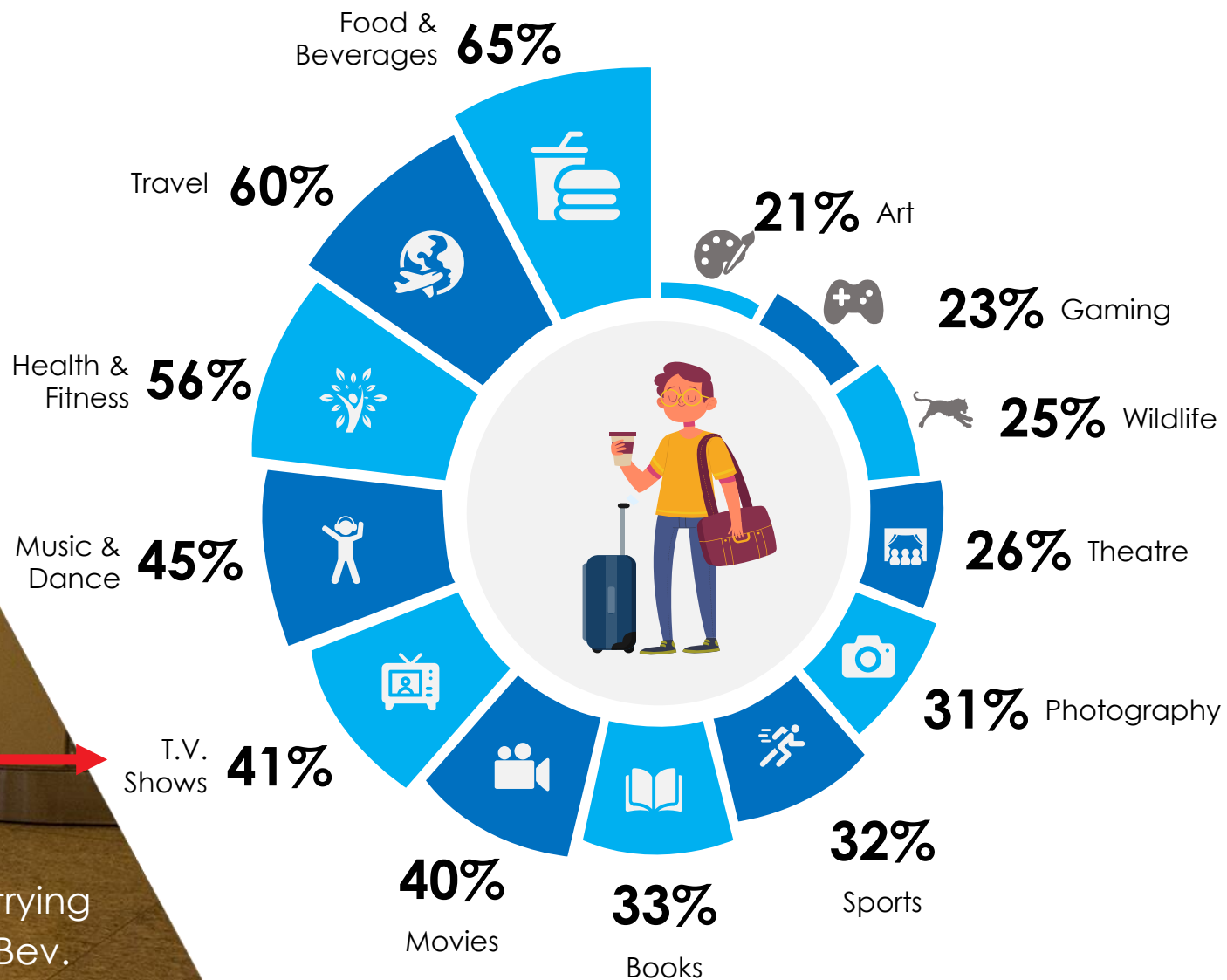


Traveler Interests & Behavior



**2 in 3
passengers**

are interested in trying different Food & Bev. followed by Travel and Health & Fitness



11

Summary



Mumbai Airport Passenger

Demographics

97% NCCS A

60% Officers/
Executives/
Businessmen

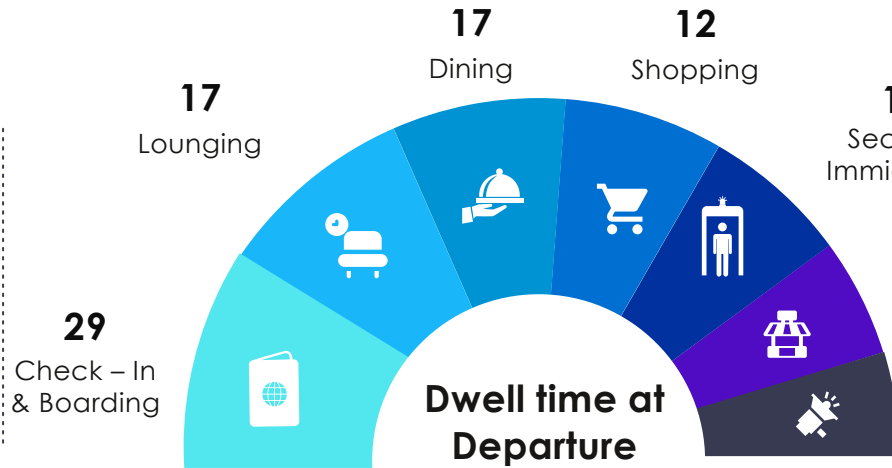
76% 25-55 yrs old
Key Decision makers

56% Males

44% Females



Time Spent Distribution(in mins)



Media Apps Used Regularly



TRY NEW
THINGS

80%



INSTAGRAM

53%



NETFLIX

45%

Apps Used in Last 1 month



89% Shopping
Apps



85% Payment
Wallet Apps



82% Food
Ordering

~40% Business
Travellers



~60% Leisure
Travellers

Average Trip in a year



4 Domestic

12 Days Avg. Trip

3 International

Total Booking

69% Online Ticket
Booking

60% Love To
Travel

12

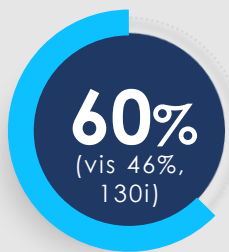
Pen Portraits



Pen Portrait of a Typical Business Traveler



~40% Business Traveller
Mumbai airport passengers

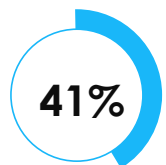
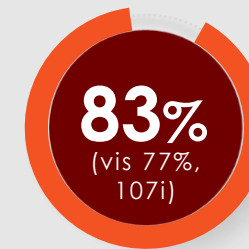


International

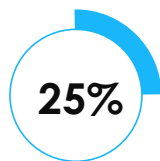


Domestic

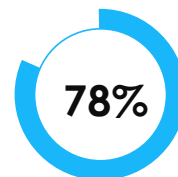
% of 2+ trips by Business passengers



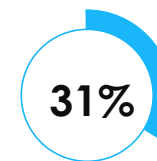
Shop 2 – 5 times
a month (vis 35%, 117i)



Intends to buy a house
(vis 20%, 125i)



Have some type of insurance
(vis 65%, 120i)



Invested in MFs
(vis 23%, 135i)

96%
NCCS A travelers

86%
In Age group 26-55 yrs ((vis 76%, 113i)

66%
have enrolled in at least one
airline loyalty programme
(vis 57%, 116i)


41%
have stayed in a 4+ star
hotel in last 1 year
(vis 30%, 136i)


App Usage

 **56%** (VIS 51%, 110i)

 **12%** (VIS 8%, 150i)


Category App Usage

 **90%** Cab booking app
(vis 85%, 106i)


 **89%** Travel booking app
(vis 84%, 106i)


 **88%** Payment Wallet app
(vis 85%, 103i)


 **85%** Food ordering app
(vis 82%, 104i)

 **81%** News app
(vis 74%, 109i)

Interest

 **52%** (vis 48%, 108i)
Participate in outdoor games

 **39%** (Vis 32%, 122i)
Interested in sports

 **35%** (Vis 31%, 113i)
Interested in photography

Base: As applicable
i denotes index to Total

Pen Portrait of a Typical Leisure Traveler



16%

arrive from / fly to Singapore (international trip)
(vis 12%, 133i)



67%

travel with family or friends
(vis 48%, 140i)



51%

have stayed at a friend's / family's
place in last 1 year (vis 39%, 129i)

97%

NCCS A travelers

78%

In Age group 18-45 yrs((vis 77%, 110i)

65%

have taken 1- 4 Domestic
trips in a year
(vis 59%, 110i)

75%

book their tickets through
online websites/ apps like
MMT, etc. (vis 69%, 109i)

App Usage



88% (vis 87%, 101i)



77% (vis 71%, 108i)



14% (vis 12%, 115i)



82%

love to try new things
((vis 80%, 103i)



47%

interested in watching TV shows
(vis 41%, 115i)



47%

interested in Music & Dance
(vis 45%, 104i)

Mumbai Airport Passengers

39%

feel that the brands
advertised in airport
ads are premium
(vis 37%, 106i)

Base: As applicable
i denotes index to Total

Pen Portrait of a Typical Millennial Traveler



48% Millennials
Mumbai airport passengers



74%

love to try new arrivals
(vis 70%, 106i)



64%

post life events on social
(vis 59%, 108i)



35%

interested in Sports
(vis 32%, 109i)

96%

NCCS A travelers

80%

spend 1 hour + in
Departure terminal
(vis 76%, 105i)



On an average intent
to purchase around 5
of the listed brand
(vis 4, 121i)

App Usage



90% (vis 87%, 103i)



25% (vis 21%, 119i)



57% (vis 53%, 107i)



12% (vis 10%, 120i)



55% (vis 51%, 108i)

Category App Usage



91% Shopping app
(vis 89%, 102i)



87% Cab booking app
(vis 85%, 102i)



89% Payment Wallet app
(vis 85%, 105i)



87% Travel booking app
(vis 84%, 104i)

Base: As applicable
i denotes index to Total
Millennials- 23-38 yrs

Summary

Mumbai

the dynamic metro city and financial capital of India is considered as a city which never sleeps. Much like Mumbai, her airports also are ever awake and considered a gateway to the world; with flights to every nook & corner and milestone achievement of successfully ferrying close to 50 million passengers in the past year

Brand Perception

Brands advertised at the airport are perceived as premium

Brand Reach

Mumbai Airport Passengers are affluent with high spending behavior and airport advertising offers an opportunity to reach this niche audience in the right frame of mind

Brand Salience

Passengers with close to 2 hours of dwell time and their desire to try new things makes airport promotions apt to create brand salience and engagement

Brand Recall

Spending almost 7-8 mins on noticing ads in captive environment with minimal distractions would likely to make more impact in consumers minds

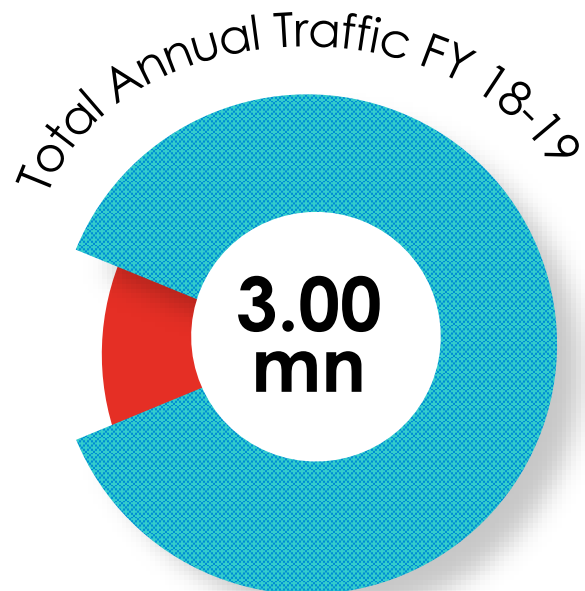
Perfect Mix

Mumbai Airport offers a perfect mix of business and leisure passengers for advertising basis your market segmentation and objective

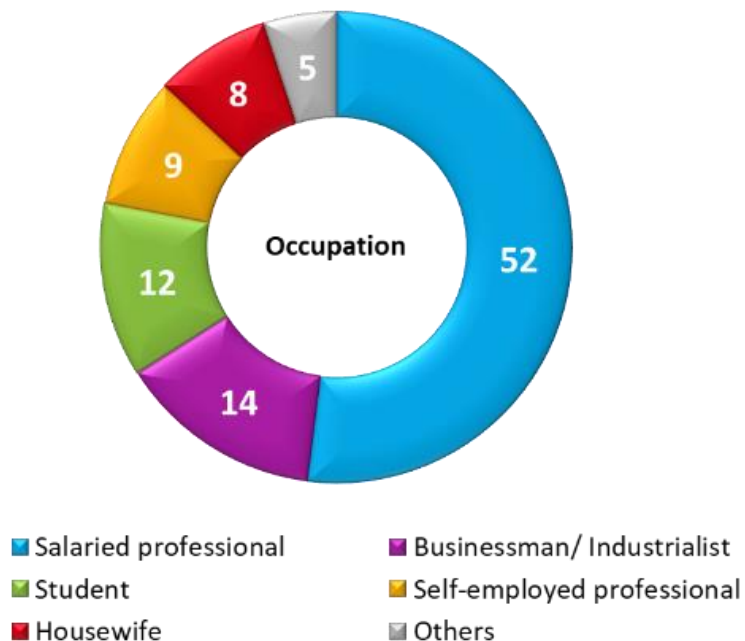


Coimbatore Airport Snapshot

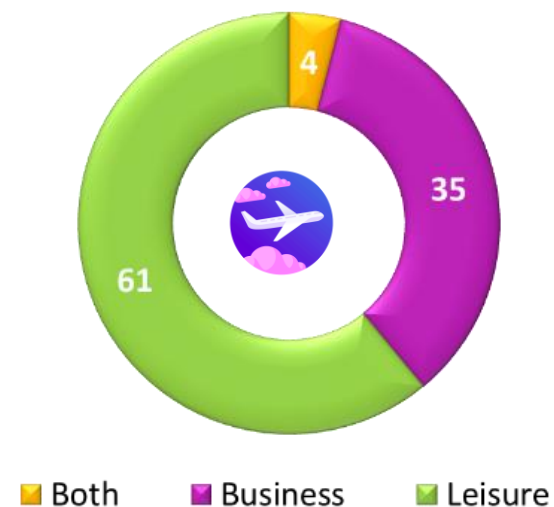
Passenger Traffic



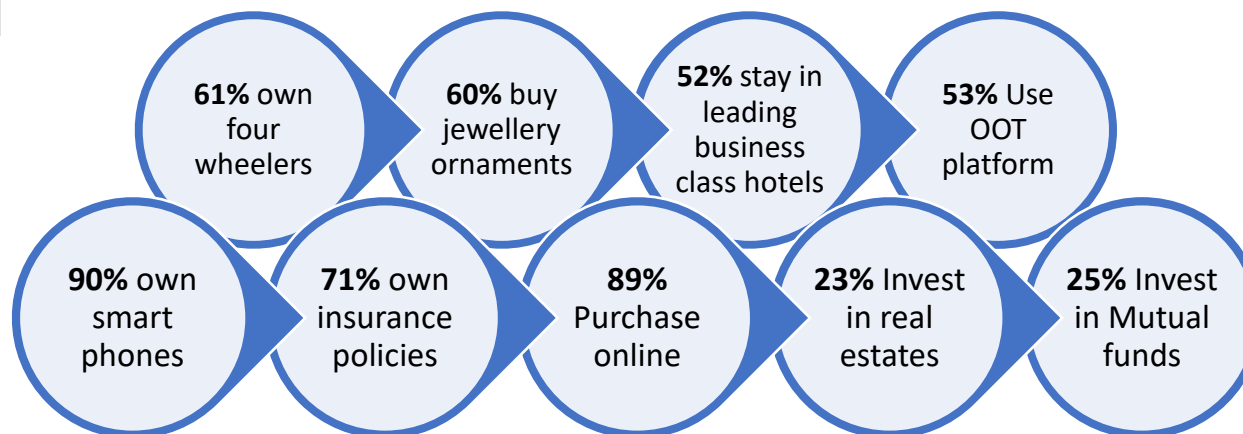
Passenger classification



Purpose of Travel

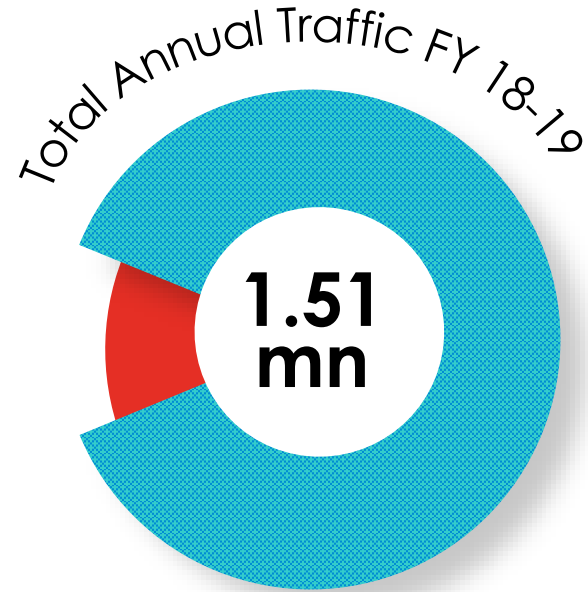


Life Style



Trichy Airport Snapshot

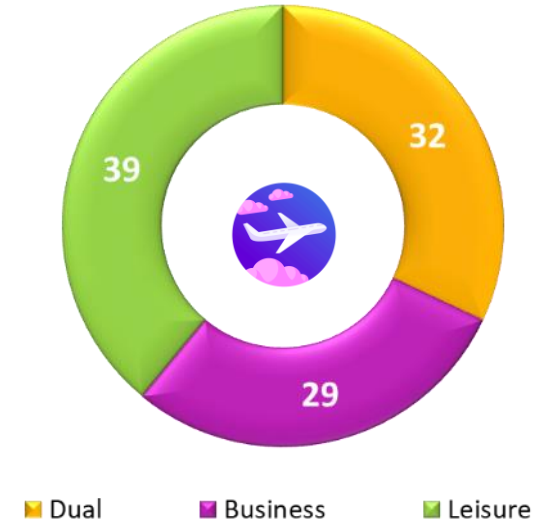
Passenger Traffic



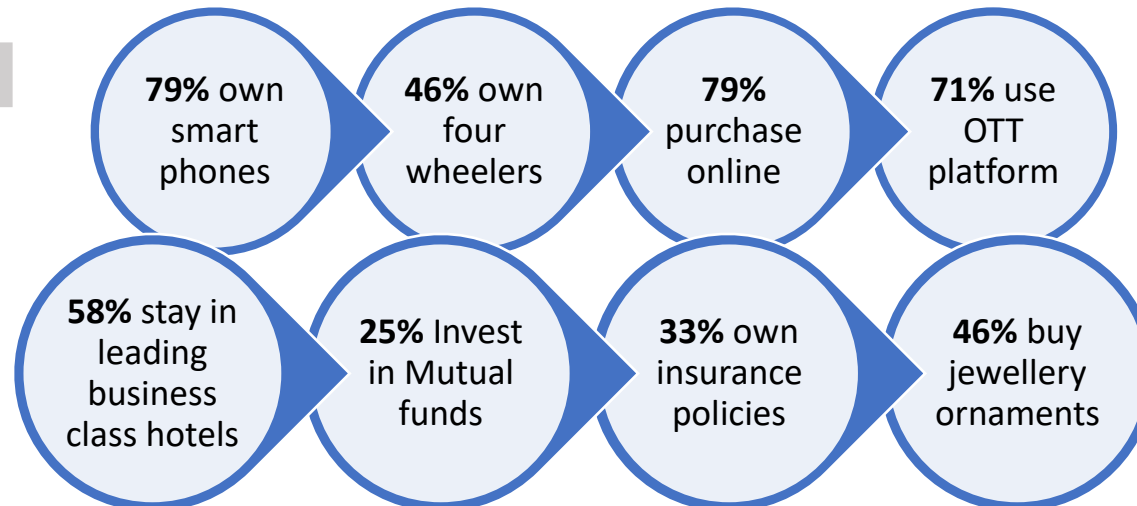
Passenger classification



Purpose of Travel

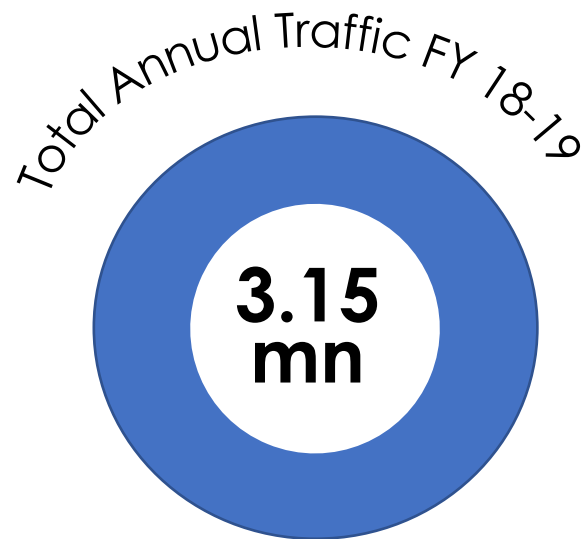


Life Style

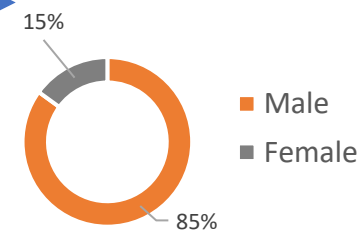
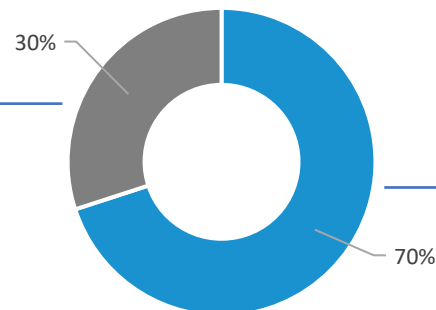
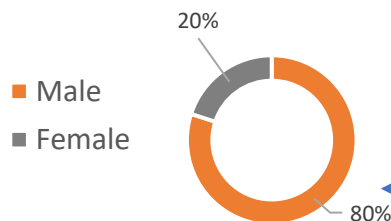


Indore Airport Snapshot

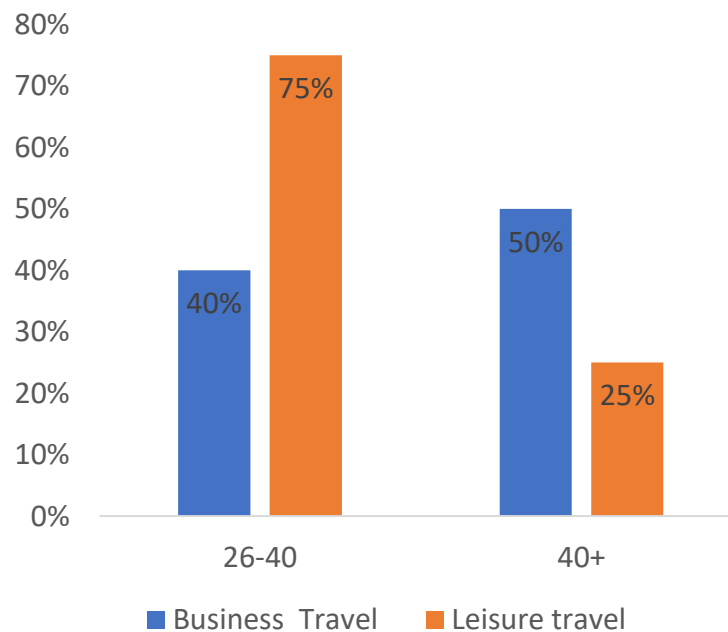
Passenger Traffic



Demographics & Purpose of Travel



Age group





THANK YOU
TIMES **OOH**TM