

Food for thought

A 360° analysis of the present and future potential of airport food & beverage

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www.foodtravelexperts.com



We are fortunate to be in the travel F&B sector

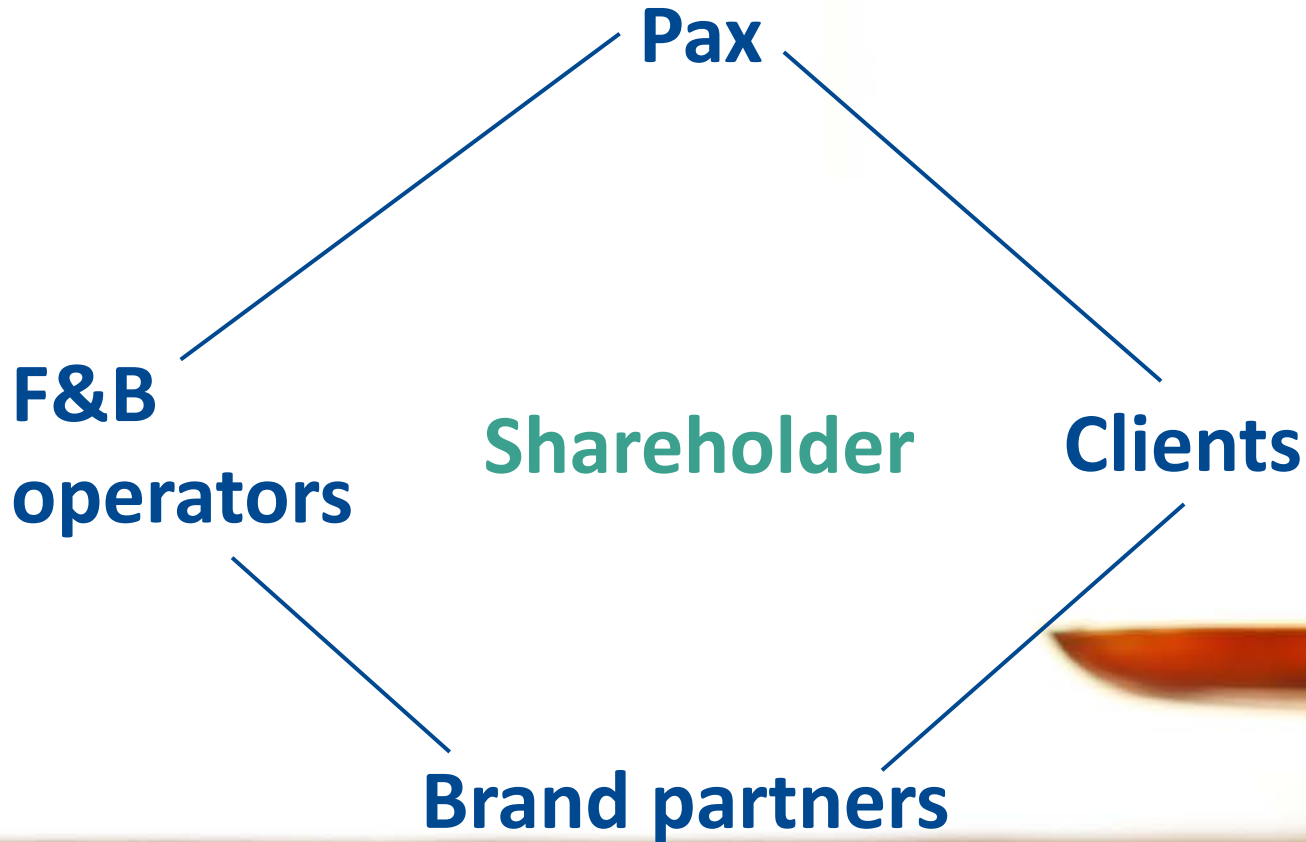
Travel F&B

- + *Pax growth*
- + *Modern infrastructure*
- + *Indulgent spending*
- + *Favourable customer trends*

Traditional downtown

- + *Declining footfall*
- + *Downtown real estate, over-spaced*
- + *Price deflation*
- + *Unfavourable consumer trends*

Our challenge: How do we effectively manage our growth opportunities?



We can learn a lot from downtown



- ✓ *Deep customer insight*
- ✓ *Robust SKU-level data*
- ✓ *Supplier collaboration*
- ✓ *Squeezing the most out of limited space*
- ✓ *Agile test, learn, adapt processes*

The travel F&B sector enjoys significant, favourable customer trends

Top 10 categories by consumers' planned increase in spending next year

1		Fresh fruits / vegetables	6		Fresh meat
2		At-home food	7		Bottled water
3		Vacation / leisure travel	8		Organic foods
4		Savings	9		Children's clothing
5		Adult clothing	10		All or 'mostly' natural products

And this should be a space for digital innovation



+ *Very digitally literate consumers*

+ *A very digitally originated market*

+ *Multiple B2C digital innovations in travel*

Yet there is limited digital penetration in the sector



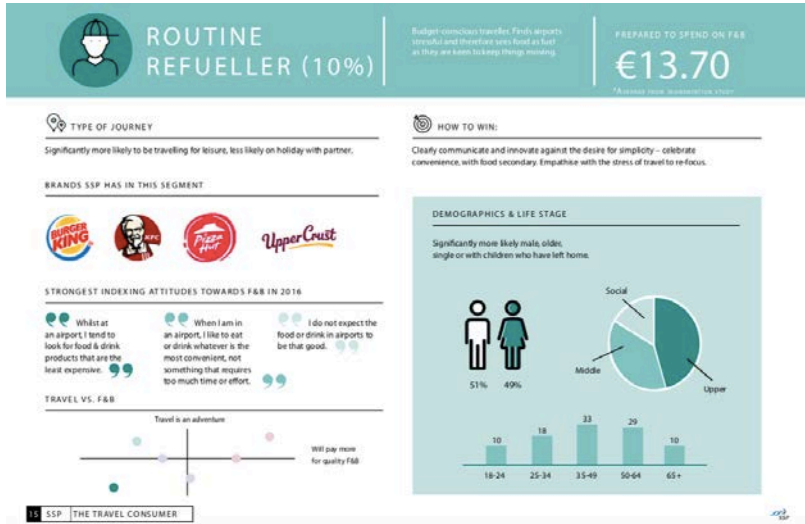
But we face a dilemma



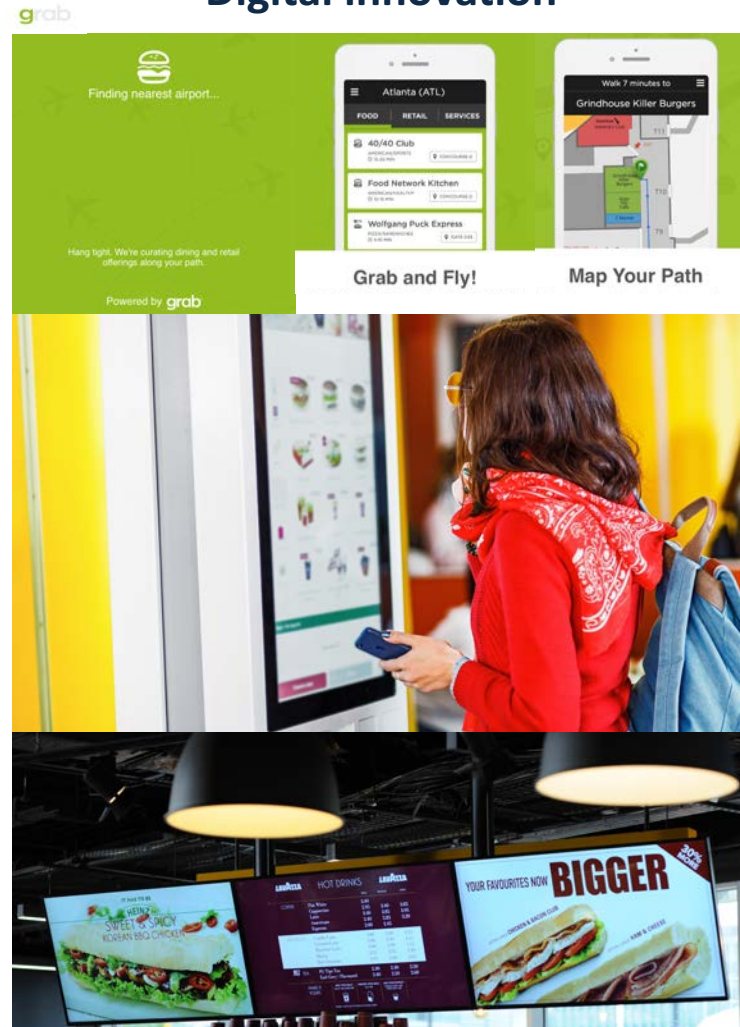
- + *World-leading innovation in format development*
- + *World-leading operation of complex, peak-load units*
- + *World-leading management of waste and costs*

My three priorities at SSP

Actionable customer insights



Digital innovation



Drive win-win growth

