



Airport and travel hub commercial planning

A scientific approach to realising commercial potential

January 2015

javelin group

STRATEGIC RETAIL TRANSFORMATION

Contents

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1. Introduction to Javelin Group

2. What we do

3. Our skills

4. Case studies

5. Our team

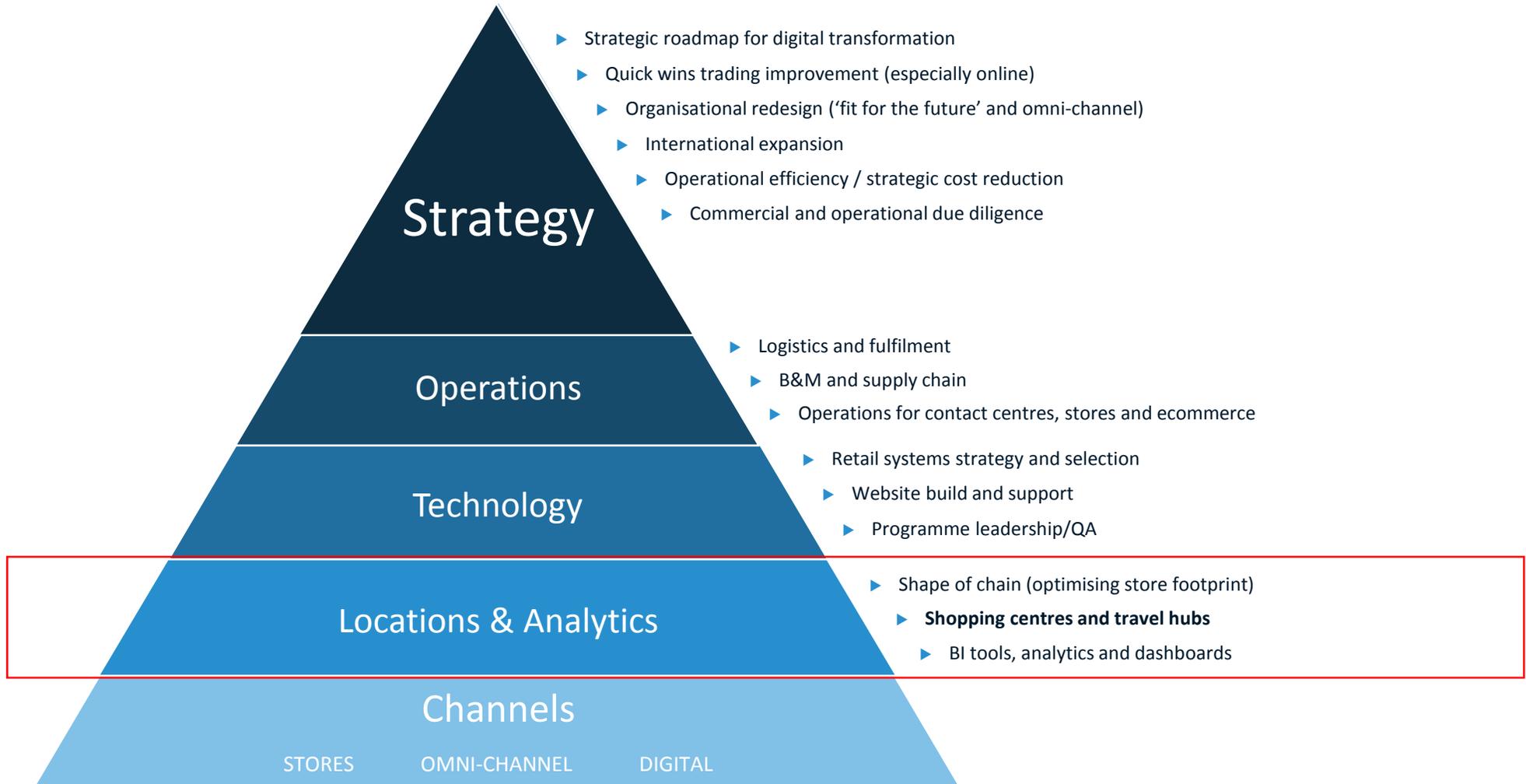
Javelin Group is the leading – and largest – specialist retail strategy consultancy

- ▶ Experts and vertical specialists in strategic retail transformation
 - Skills in strategy, operations and technology across all channels (stores, mobile, ecommerce, omni-channel)
- ▶ Highly experienced team of 230+ professionals
 - With a focus on helping clients to plan and implement growth
- ▶ Extensive global client list including the world's leading retailers and brands
 - 50% of work is outside the UK, especially Germany, France, the Netherlands and the Nordic countries

Javelin Group plans and implements growth strategy for world-class retailers, brands and distributors across the globe



Our vertical retail model addresses all aspects of strategic retail transformation



Contents

Airport and travel hub commercial planning

A scientific approach to realising commercial potential

January 2015

1. Introduction to Javelin Group
2. **What we do**
3. Our skills
4. Case studies
5. Our team

We offer a scientific approach to location research and analytics in the retail sector

“Shape of Chain” retailer location planning



We help retailers to optimise their ‘shape of chain’ - the strategic development and transition of store estates, informed by a deep understanding of the drivers of variable store performance and the rapid changes that are reshaping the way consumers shop.

Optimised shopping centre research



We advise on the commercial viability of new schemes, commercial due diligence to inform acquisition appraisals, and on how to optimise sales and rental revenues in existing schemes through optimised tenant mix and marketing.

Travel retail



We assess the commercial trading potential, optimum category & tenant mix of retail in major hubs.

We deliver market leading mobile solutions for effective customer engagement.

We deploy market leading BI tools to help management deliver actionable insight from data

Ignite (marketing & payment on the move)



We have combined with Paythru to offer Ignite, a market leading m-Commerce proposition for contextual mobile marketing and payments: *“the right message, to the right customer, in the right place and time”.*

Analytics & insight



We provide a variety of proprietary BI software and data insight tools to help our clients derive actionable insight from their Big Data assets.



Our team has wide experience across a range of airport and travel hub engagements

- ▶ We work with clients across a wide variety of travel locations
 - Which gives us deep understanding of the complexities of passenger travel



Extensive team experience in shopping centres supports our airport and travel hub insights



- ▶ We have advised over 200 shopping centre investors / developers worldwide over recent years on new scheme planning, acquisitions and strategic asset management.
- ▶ This extensive experience benefits our travel clients by ensuring that best practice analysis and advice from both the travel industry and the shopping centre community is applied to our work.

Contents

Airport and travel hub commercial planning

A scientific approach to realising commercial potential

January 2015

1. Introduction to Javelin Group
2. What we do
- 3. Our skills**
4. Case studies
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Five principal areas of analysis for airport and travel hub owners and investors

1 Strategic asset management



- ▶ What should our retail strategy be to respond to changing consumer needs?
- ▶ How should we segment our passengers to best understand and address their needs?
- ▶ How are our tenants performing relative to the rest of the airport and vs. relevant international benchmarks? Is there room for growth?
- ▶ Where is growth coming from? Which categories / offers? Is it sustainable?
- ▶ What actions should we take on category space mix and tenants to enhance performance and passenger appeal?
- ▶ What potential is there to increase conversion rates and ATV's?

2 Category & space optimisation



- ▶ What sales, income and space potential does the passenger and destination mix deliver?
- ▶ How much additional space is supportable and available?
- ▶ What is the optimum tenant mix strategy?
- ▶ What is the sales potential and affordable rental income?
- ▶ How is the commercial offer satisfying customer needs/aspirations?
- ▶ What decision support tools could be deployed to enhance future ongoing commercial space planning?

3 Mobile engagement



- ▶ What is the opportunity to enhance the pax experience and customer engagement for our tenants by deploying a market leading mobile platform which combines real-time, pinpoint geo-location with smart messaging?
- ▶ How could this help to enhance our communication of tenant promotions, wider marketing, wayfinding, other airport information etc.
- ▶ How might the latest beacon technology be used to optimise this deployment?
- ▶ What is the revenue potential from such a digital platform?
- ▶ What additional insight could it provide which would assist us in other commercial and operational decisions?

4 Acquisition appraisals



- ▶ How well is the airport performing compared to leading performance benchmarks?
- ▶ Is the commercial offer relevant to passengers at various points of their journey through the airport?
- ▶ What is the likely future requirement for retail and foodservice? And can the terminal adapt to meet these future requirements?
- ▶ Is there an opportunity to actively enhance sales and income growth?

5 Analytics & BI tools



- ▶ We provide a variety of proprietary BI software and data insight tools to help our travel hub clients derive actionable insight from their Big Data assets

The following slides set out example work-streams that typically underpin our work

- ▶ Strategic visioning
- ▶ Passenger segmentation
- ▶ Passenger flow analytics
- ▶ Passenger research insight
- ▶ Category planning
- ▶ Sales & space optimisation
- ▶ Analytics & financial modelling
- ▶ Space masterplanning
- ▶ Mobile customer engagement



Using our understanding of consumers and retail sector to guide strategic planning in travel

7. Strategic Opportunity: Current Tenants

6 key areas of focus for an energised category management strategy should include....

1. Customer Research
"Linking products to passenger profiles and reasons for shopping for target marketing campaigns"

2. Increasing "Effective" Dwell Time
"Operational focus on increasing passenger penetration"

3. Space, Range & Brand Management
"Developing a structured, empirical approach to maximise profitability & productivity"

4. Customer Engagement
"Finding innovative ways to engage with customers to encourage loyalty and trading up"

5. Management of Supplier Investment
"Pro-active management of vendor resources to reduce costs and improve margins"

6. Pricing & Promotions
"Establishing a clear pricing policy & promotional calendar to drive sales"

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4. Strategic Opportunity: Mobile Engagement

Winning mobile platforms will combine these 5 elements ...

1. Precise, real-time geo-location

2. Intelligent, real-time customer targeting

3. Flexible mobile payment & redemption

4. White label design & platform BI

5. Integration

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5. Strategic Opportunity: Customer Engagement (Big Data)

New gen BI = major step-forward in ability to deliver actionable insight from data

1. Data Blending
• Format, clean and blend multiple data sources from across the enterprise in an intuitive drag and drop workflow, without impact on other teams or changes in IT infrastructure.

2. Predictive Analytics
• Alleryx makes analytics available to everyone. Run statistical techniques such as regression, clustering, decision trees and predictive modelling with no coding required.

3. Mapping & Spatial Analysis
• Geocode and map your customers, stores and competitors, generate trade area catchments and run drivetimes 100x faster than traditional GIS packages and output to a variety of visual formats.

4. Business reporting
• Replace Excel spreadsheets with automated professional reports and share by email or publish to the Alleryx Gallery for others to consume on laptops, tablets or other web enabled devices

• Alleryx deploys deep analytical power through an easy-to-use single interface:
 - Removing the need for integrating a suite of software tools
 - Simple to use with very little training and support required

• Any analytical business process can be "designed" on the desktop to run **super fast**, and can also be published to the web (using user-friendly "apps") to empower multiple users across the enterprise

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2. Background : The Evolution of Retail

Future retailer performance will be significantly impacted by ongoing channel shift

Impact of Multi-Channel - Spend Split Projections - Clothing

Spend Growth to 2020 (%)

0% (In-store)
+56% (Online)

Legend: Direct only (£m), Store-to-direct (£m), Direct-to-store (£m), Store only (£m)

• Store-only spending on clothing projected to remain static as a proportion of retail spend

• This will impact MAG's future potential and therefore requires consideration of a multi-channel strategy

• Significantly more spend involving multiple channels (online, mobile etc)

– Store-based spend expected to experience greater growth vs direct-to-store

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- ▷ As Europe's leading specialist retail consulting business, Javelin Group has a unique insight into the drivers impacting consumer behaviour and retailer performance
- ▷ Overlaid with our wide experience of travel retail, this allows us to work with scenario management teams to bring a fresh perspective to commercial planning in travel environments:
 - What should we be famous for?
 - Which strategic initiatives provide greatest potential for growth?
 - How should we best respond to the threat of omni-channel retail?

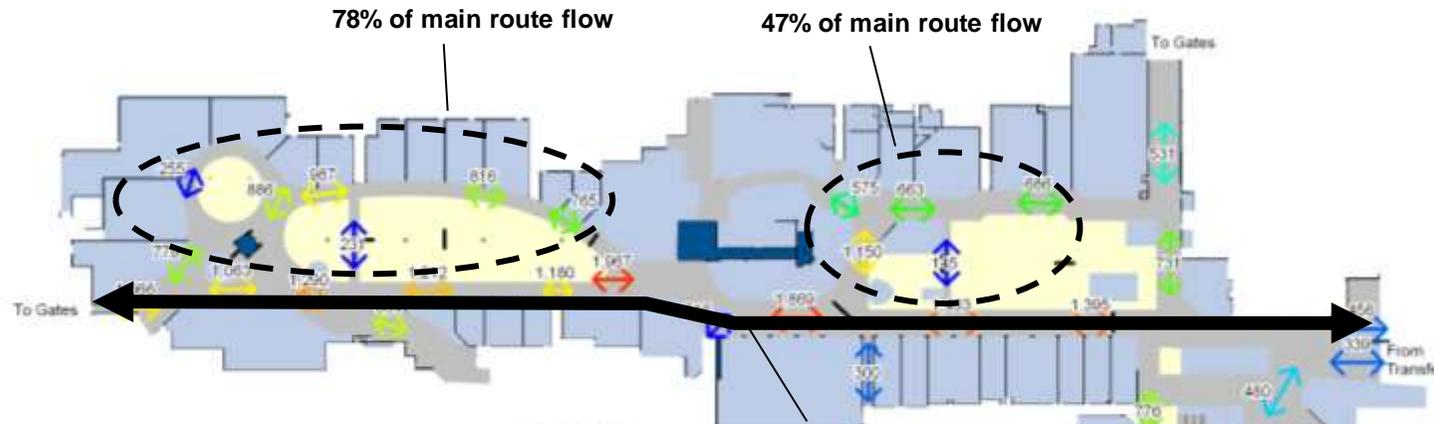
Pax research, spend activity and external data used to segment passengers based on behaviours

Super Group Clusters	Description	Exit Survey (%)										Avg. Station Survey (%)	St. Pancras vs. Avg Station Survey Index									
		Sep-09	Sep-11	Mar-12	Sep-12	Mar-13	Sep-13	Sep-13	Mar-14	Sep-14	Sep-09		Sep-11	Mar-12	Sep-12	Mar-13	Sep-13	Sep-13	Mar-14	Sep-14		
Healthy Connected Movers	 Affluent groups who over-index on buying gadgets and like to buy healthy food	26	26	27	24	27	27	28	27	24	20	130	130	135	120	135	135	140	135	119		
Foodies on the Run	 Affluent professionals who regularly buy fresh food from leading supermarkets and specialists	30	28	29	24	27	24	24	24	29	22	136	127	132	109	120	109	109	109	132		
Busy Multi-Tasking Parents	 Affluent busy families struggling to fit life in. Over indexing on time-saving purchases - dry cleaning, gifts, flowers...	15	12	14	16	16	17	13	17	14	15	100	80	93	107	108	113	85	113	94		
Struggling in the City	 Young and old singles who are less affluent. Over index on clothing, bars and fast food.	16	19	16	17	14	17	20	17	16	25	64	76	64	68	56	68	80	68	63		
Big Day Out	 Retired and less affluent families. User network for days out. Over-index on sweets, magazines and items to pass the journey.	13	16	14	19	16	15	15	15	17	18	72	89	78	106	91	83	86	83	96		

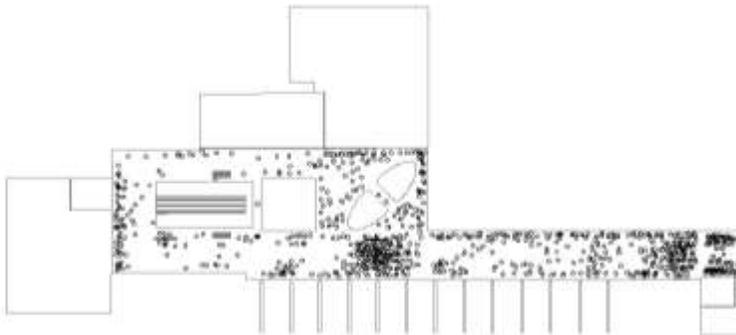
- ▷ Combination of passenger research, external segmentation and sales data from retail tenants allows us to build a picture of how passenger groups interact with the commercial offer
- ▷ Statistical analysis used to drive out the principal drivers of consumer behaviour which can be used to build a segmentation of passengers based on meaningful and intuitively sensible differentiating attributes

Routes, flows, static occupancy and dwell times analysed to understand ‘pitch’

Flow rates across terminal



Static occupancy of passenger map



▷ Passenger flow, use of space and dwell times can provide important overlays to understanding how passengers interact with the terminal and commercial zones

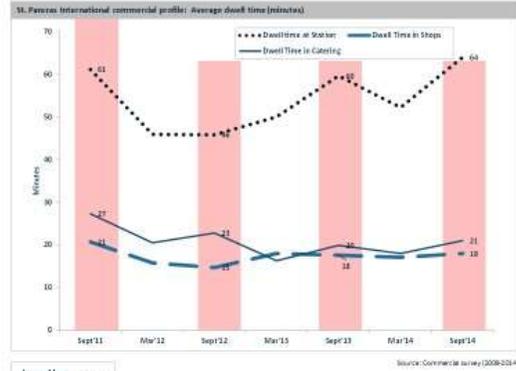
▷ This can assist in providing layout and operational recommendations to improve passenger enjoyment and in turn increase sales

▷ Illustrative example shows flow rates and static occupancy levels across a leading European terminal: key inputs in determining a consistent “Site Quality Indicator” for each unit in the terminal

Passenger research used to deliver actionable insight

4 How do visitors interact with commercial offer? | Shopper profile | Average dwell time

Overall, dwell time of commercial visitors at the station has increased



The average overall dwell-time of "shoppers" in St. Pancras International has increased (64 mins) and is longer than the overall station-average dwell (51 mins)

However, dwell time in the shops has not increased since Sept 13

Dwell in catering facilities has only slightly increased to 21 mins vs. 20 mins (Sept 13)

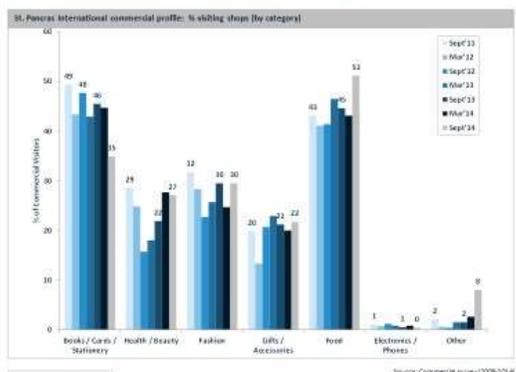
However, those visiting shops and catering spent 24 mins visiting shops and 23 mins visiting catering (spending 75 mins in total at the station)

#1: "Urban Travellers" - most common visitor (9% vs. 2% national avg)



- ▷ Original passenger research used to:
 - Profile current users
 - Inform pax segmentation
 - Understand current usage patterns
 - Track changes over time
 - Inform other strategic initiatives (e.g. tenant strategy)
 - Inform and evaluate impact of wider investments (e.g. improved wayfinding, environment)
 - Deliver useful PR sound-bites

Books/Cards/Stationery are the most popular categories visited



Food-To-Go/Homemade and Books/Cards/Stationery are the most visited categories at St. Pancras International

However, % of visitors to Books/Cards/Stationery shops has fallen to 35% vs. 48% (Sept 13) vs. 48% (Sept 12)

This may be due to decrease in offer with Payless store closing

Increase in H&B since Sept 13 and Sept 12 could be due to an increase in offer (e.g. MAC and L'Occitane)

Illustrative brand benchmarks?

- Example target brand benchmarks:
 - Foodservice, e.g.:
 - Wahaca, Leon, Pod, Itsu, Ben's Cookies, Pho, EAT, Snag, Barburrito, Byron
 - Luggage, Jewellery and accessories, e.g.:
 - Pandora, Kipling, Radley, Tatty Devine, Swatch, Aspal of London, Fraser Hart
 - High St clothing and accessories, e.g.:
 - J Crew, TM Lewin, Calzedonia, Ted Baker, Mackerr, Intimissimi, Browns, Kathmandu, Mango Touch, Kurt Geiger, Banana Republic, H&M
 - Gifting, e.g.:
 - Hotel Chocolat, Mr. Simms Old Sweet Shoppe, BBC Shop
 - Stationery/Books, e.g.:
 - Stylytison, Mont Blanc, Daunt Books
 - Cosmetics/H&B, e.g.:
 - Benefit, Spacie Nil, Penhaligon's, Crabtree & Evelyn, Kiehl's, Lush, Molton Brown
 - Small electricals, e.g.:
 - Apple, Samsung, CPW, Addy (Dixons), BOSE, Bang & Olufsen
 - Anchor, e.g.:
 - J&P, H&M kiosk shop...
- JewelIn Group recommends targeting brands that meet the following criteria:
 - Aspirational
 - Differentiated (e.g. unusual store environment)
 - Promoting impulse spend (e.g. offers that allow people to decide quickly (i.e. limited stock items)
 - "Best of Britain" (available in London) with recognised brands (St. Pancras International is an international gateway to the UK)
 - Provide other brands that have some international recognition and/or propositions which are easy to understand for shoppers with limited time
 - Increase appeal to older AB consumers and business travellers

Detailed category management plans

▶ Insight

- Market, brand, competitor, and customer insights (identifying strengths, weaknesses and growth opportunities)

▶ Proposition

- Defining a compelling multi-channel proposition, format and marketing/communications strategy

▶ Strategy

- Category strategy (identifying category roles, goals and action directions over short, medium & long-term)

▶ Plan

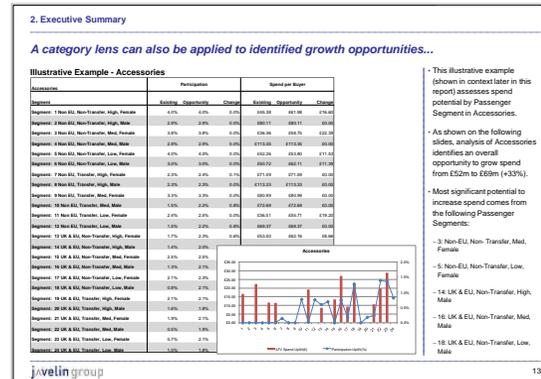
- Category plan (sales, volume, profit and space planning; brand and line planning; pricing – good; better; best)

▶ Implementation

- Implementation plan (including store layout, presentation, promotional activity, clearance/stock exit)

▶ Review

- Range review (focusing on product, supplier and brand performance analysis; pareto/long-tail)

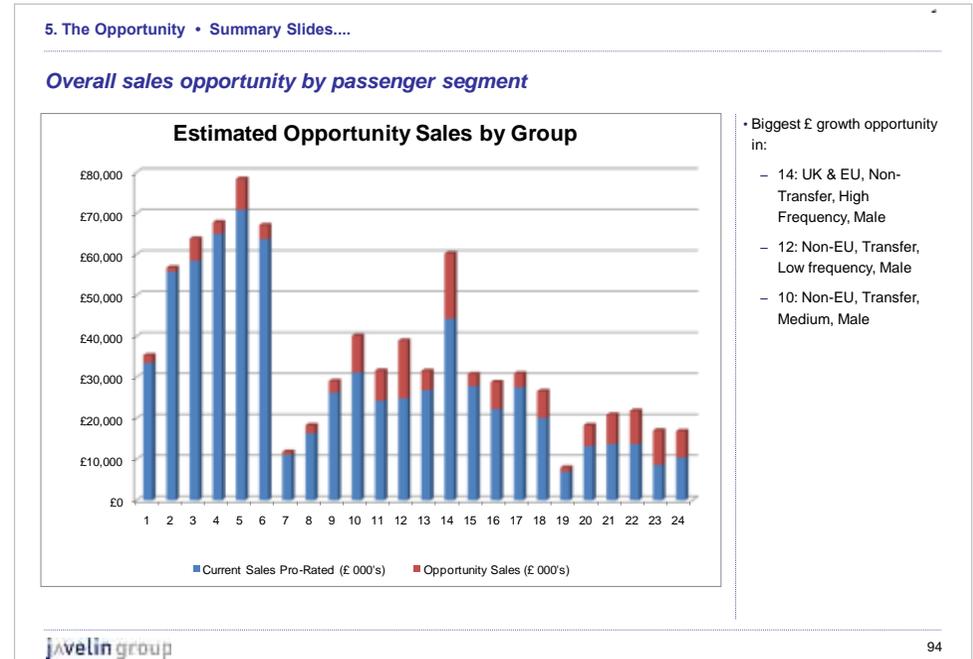
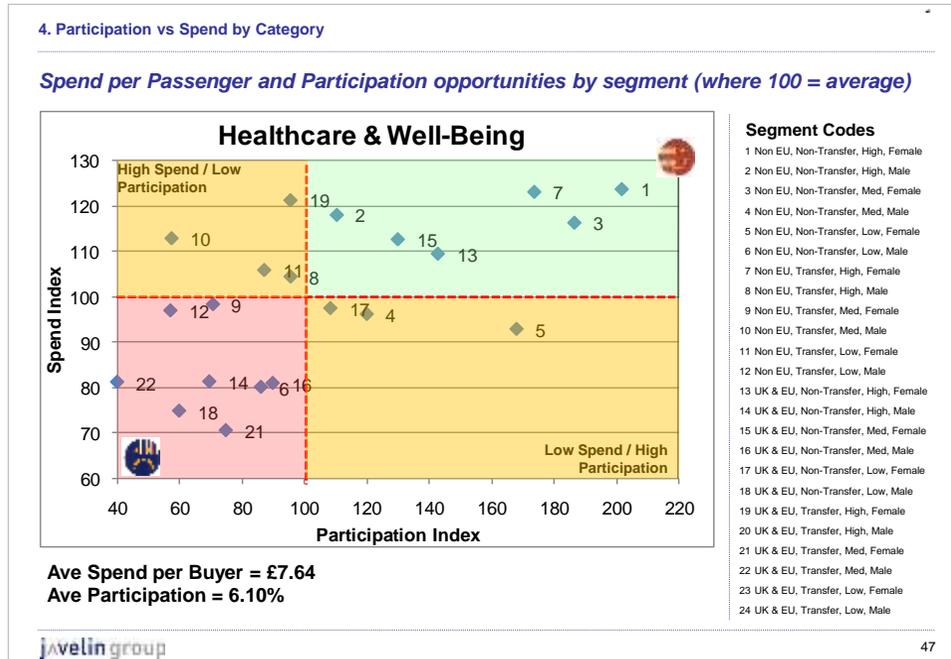


Category strategy:

Category opportunity	Main categories to deliver growth
Brand opportunity	Main brands to work with to deliver growth
Passenger opportunity	Main passenger segments, and characteristics, to target
Terminal opportunity	Specify whether there is a specific opportunity at Terminal level

Passenger spend behaviours analysed to establish opportunities for growth

- ▶ Benchmarking participation and spend per pax group
 - To identify latent opportunities for sales growth
- ▶ Overlaid with targets re revenue targets per square foot, deliverable space etc. to:
 - Establish “theoretical” optimum space by category
 - Assess development plans to determine optimum planned deliverable space



Modelling of evolving space demand opportunities

- ▶ Models can also be deployed as user-friendly decision support tools
 - To facilitate client usage on an ongoing basis
 - To test a range of “what if...?” scenarios
 - To test impact of planned changes to venue and/or category mix
 - To understand impact of changing macro drivers (e.g. pax numbers, profile etc.)

5. Turnover and Space Forecasts

Scenario: 8.5 M passengers 60:40 passenger split (domestic / international)

8.5m Pax, 60:40 Domestic / International Split

Space Split	Current Sales (MNOK)	Current Space Sq m	Optimum Sales (MNOK)	Optimum Space Sq m
Landside Departures				
Convenience	47.0	175	28.8	160
Specialty	0.0	0	7.6	64
F&B	18.8	850	19.1	382
Sub-Total	65.8	1,025	55.5	605
Airside Departures				
Convenience	42.0	150	93.6	520
Duty Free	350.0	760	383.8	903
Specialty	28.5	250	84.9	708
F&B	49.0	604	107.0	2,141
Sub-Total	469.5	1,764	669.3	4,272
Airside Arrivals				
Duty Free	0	0	516.0	1,214
Sub-Total	0	0	516.0	1,214
Landside Arrivals				
Convenience	0	0	45.4	252
Specialty	0	0	2.0	17
F&B	0	0	13.7	273
Sub-Total	0	0	61.1	542
Grand Total	535	2,789	1301.9	6,633

Airside International / Domestic Requirement Breakdown

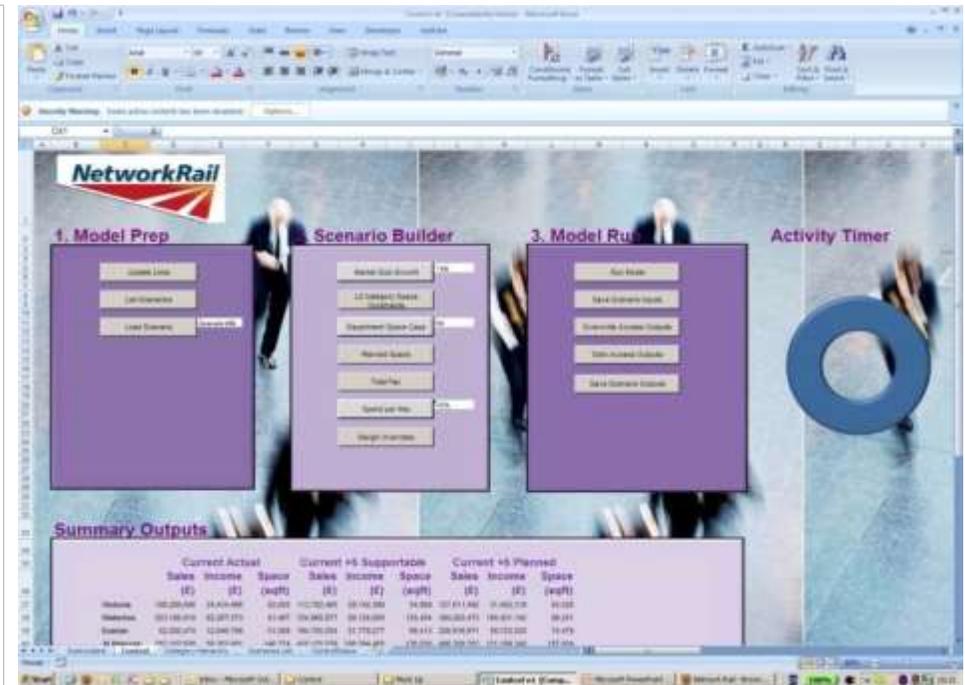
Airside Split Domestic Passengers

Airside Departures	Optimum Sales (MNOK)	Optimum Space Sq m
Convenience	57.2	318
Duty Free	0.0	0
Specialty	38.8	323
F&B	46.8	937
Sub-Total	142.8	1,578

Airside Split International Passengers

Airside Departures	Optimum Sales (MNOK)	Optimum Space Sq m
Convenience	36.4	202
Duty Free	383.8	903
Specialty	46.1	385
F&B	60.2	1,204
Sub-Total	526.5	2,694
Total	669.3	4,272

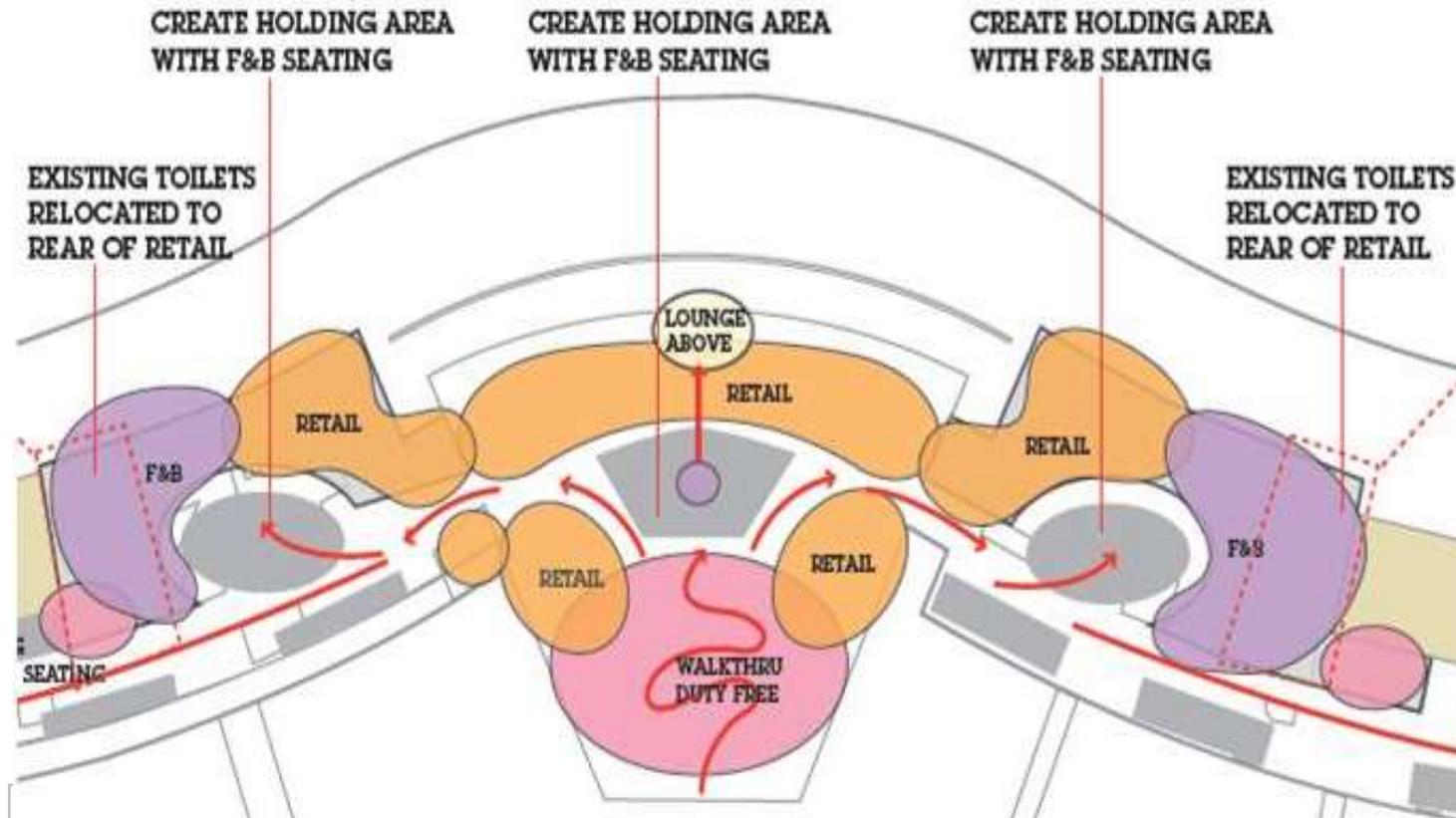
javelin group 27



We work with space planners and designers to ensure our forecasts are realised

- ▶ Zonal maps of different types used to communicate master-plan recommendations
 - e.g. quantum and mix of commercial space

- ▶ We can either provide basic outlines ourselves, work with in-house teams or work with our partner design agency (Portland Design) who bring our forecasts to reality through detailed space plans, with supporting way-finding and environmental design



We work with digital partners to deliver innovative m-commerce platforms

- ▶ Check-in & flight information
 - Check-in, departure gate, delays, digital wayfinding, special assistance
- ▶ Context-aware marketing & promotions
 - e.g. engage the right passenger with the right message at the right time and place and/or drive traffic to in-store...
- ▶ Loyalty, rewards & customer engagement
 - e.g. integrates mobile with CRM, CMS and existing loyalty programmes
- ▶ Mobile payments
 - e.g. 1-click purchasing using credit cards, debit cards, vouchers etc.
- ▶ Queue-busting
 - e.g. basket build, self checkout, curated store visits
- ▶ Parking, car hire and hotels
 - e.g. platform can support promotional activity with 3rd party partners
- ▶ Digital wayfinding:
 - e.g. dynamic blue line using latest real-time geolocation technology



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Case study: Retail strategy opportunities for Manchester Airports Group

Strategic visioning case study

Background

- ▶ MAG wished to review their current retail proposition in light of the rapid changes being seen in consumer behaviour and multi-channel retail offers in the wider retail landscape

Project

- ▶ Javelin Group commissioned to develop an evidence-based understanding of the wider drivers of consumer and retail change today and across a 5-10 year time horizon
 - Whilst setting out strategic guidelines for MAG in responding to these drivers of change

Outputs

- ▶ Javelin Group provided a strategic opportunities report for MAG covering
 - Multi-channel strategy
 - Mobile engagement
 - Data analytics and customer engagement
 - Current tenants and proposition innovation
 - Opportunities to support further retail on Manchester Airport campus

Benefits

- ▶ MAG are currently assessing several of these strategic opportunities in further detail



Case study: Space optimisation for Network Rail

Space optimisation case study

Background

- ▶ This project represents a step change in Network Rail's capability to plan 'space' on managed stations and to develop a thorough and consistent approach for determining the true commercial potential of each station, based on an optimized retail category mix that delivers the strongest proposition to customers and greatest rental return.

Project

- ▶ Network Rail's commercial team engaged Javelin Group to develop a Space Optimisation Model to help identify potential sales and income growth from better space planning on stations

Outputs

- ▶ Javelin Group developed a model that delivers one consistent view of the retail market and consumer trends as well as customer demographics in and around stations

Benefits

- ▶ Javelin Group's Space Optimisation Model was delivered in Microsoft Office to Network Rail (combination of Access + Excel) and allows Network Rail a more objective 'traveller-centric' approach to allocating space. With its user friendly interface, Network Rail can create permutations and combinations around space allocation based on current and projected use of available and planned space.



I just wanted to thank Javelin Group for all the hard work and effort that went into producing Network Rail's Space Optimisation Model. We are really looking forward to utilising the tool to help drive the continual development of our tenant mix and through that deliver additional income which is then reinvested back into the Rail industry. I'm sure we will be working together again soon.

Daniel Charles, Retail Operations Manager.

Case study: HS1 at St Pancras International across a wide range of engagements

Passenger flow and research case study

- ▶ Engaged across a range of engagements at St Pancras International since 2009 including
 - **Consumer insight**
 - Ongoing tracker survey of station users and shoppers to understand how the profile of the station is evolving post re-development and their behaviours when in-station
 - > Research helps to identify new category and brand requirements
 - > Research helps to test impact of recent investments (e.g. new wayfinding)
 - > Survey complements annual National Passenger Survey
 - **Wayfinding**
 - Working with partners, Directions (research) and Portland Design (creative), we delivered a new wayfinding programme for St Pancras which went live summer 2014
 - > Introduces more visible fonts, colour hierarchy to separate train from other info, more logical sign placement and content
 - > New wayfinding delivered an immediate upturn in passenger ratings on ease of navigation
 - **Digital**
 - Developed and deployed the “St P” app (on our unique “Ignite (marketing & payments on the move)” mobile digital platform
 - > Currently live in beta phase: public launch in January 2015



Case study: Category planning at Dublin Airport

Category management case study

- ▶ ARI is a leading international airport retail management company and has operations across the world at airports in Europe, North America and the Middle East
- ▶ Aer Rianta is reviewing retail buying and required the development of a strong Category Management approach to
 - Improve understanding of customer behaviours
 - Build on internal knowledge and experience
- ▶ Improve the way Aer Rianta manages its business
- ▶ Javelin Group developed a Category Management plus retail positioning approach to meet these objectives
- ▶ The scope of this project / methodology trialled at Dublin Airport consisted of
 - Stage 1: Gather data and trend information
 - Stage 2: Develop category business plans with the DAA teams

AerRianta



Case study: Developing and operating BAA's strategic space planning model since 2004

Space optimisation case study

- ▶ Development of strategic space planning tool to assist the UK's leading airport operator
- ▶ Our Category Management (CM) Model uses existing data on customers, retail performance and income margins to establish sales and profit opportunities by product category (covering over 70 different categories)
- ▶ The CM Model identifies optimum space mix by category for each terminal and is used to test "what if...?" scenarios related to projected changes in air traffic dynamics
- ▶ The CM Model is now a central element in BAA's commercial retail planning and is used across all UK terminals
- ▶ Also developed model to assess commercial return delivered by different airlines
- ▶ Modelling now being moved onto Alteryx BI tool to allow management to "self-serve" ad hoc analytics

"Javelin Group has been central to the model's (and space planning's) success."

Heathrow
Making every journey better



Javelin Group brings an ability to convert business scenarios and diverse data-sets into a smooth modelling process that combines all the key commercial drivers of our business. The Category Management model delivers clear, practical outputs that we are able to input into our strategic plan. Javelin Group has been central to the model's (and space planning's) success.

Dave Ellis, Customer Insight Manager.

Case studies: Advising architects across commercial masterplanning exercises at Heathrow Airport

Space masterplanning case study

Project: Heathrow Masterplanning T3 & T5 (2012/13)

- ▶ Engaged by Chapman Taylor to work as part of the Atkins and Arup masterplan teams to explore T3 & T5 masterplanning options for Q6
- ▶ Providing the analytics for the retail and catering, in terms of quantifying demand by zone and category, how passengers interact with the commercial areas whilst considering influencing factors: passenger mix, destination mix, dwell times and passenger flows amongst other factors
- ▶ Supporting space planners and designers to realise the forecasts produced into appropriate commercial environments that will enhance the passenger experience and meet demand

ATKINS

ARUP

Chapman Taylor

INTERNATIONAL | ARCHITECTS | MASTERPLANNERS | DESIGNERS



Case study: Evaluating masterplanning options at Copenhagen Airport

Space masterplanning case study

- ▶ Javelin Group and our partner design agency (Portland Design) worked alongside the CPH commercial team to devise long term masterplanning options for the airports airside commercial zones
- ▶ We analysed current commercial performance and original consumer research to identify opportunity gaps and development options for the airside commercial zones
- ▶ The project team created a sales forecasting model to identify the optimum sales, space demands and mix by zone to maximise potential returns. This model was run across two key terminal masterplanning development options
- ▶ Working with CPH we identified the planning options, considering the long term strategy of the airport, that offered the closest solution to the sales and space demands identified



Case study: Streamlining and speeding up data analytics at Heathrow

Analytics tools & financial modelling case study

- ▶ Heathrow has access to numerous commercial and passenger datasets (retail sales, passenger data, performance data, car parking information....)
 - Challenge has been to make the most of these data sets in a timely and efficient manner without the need for specialist data analysts or coding skills
- ▶ Javelin Group is helping Heathrow to get better insights from its management data and speed up data processing times
 - via an analytical tool (Alteryx) that requires only a few hours of training
- ▶ First wave of analytic module building has created regular automated KPI reports
 - This module has reduced current business KPI report preparation from a couple of days to less than a couple of hours
- ▶ Currently working on developing automated tenant performance and relationship management module for retail team to access via a user friendly interface
- ▶ About to start work on a terminal space and category planning tool to guide long term masterplanning requirements

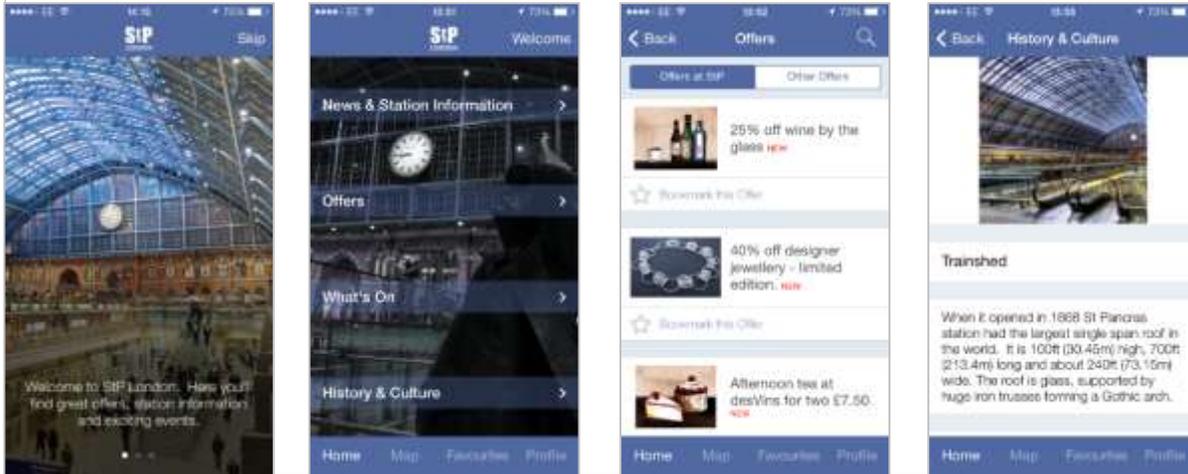
Heathrow
Making every journey better

alteryx

Case study: With our digital partners, we developed and deployed the “St P” mobile app

Digital platforms case study

- ▶ St Pancras app launches in January 2015
 - Developed for HS1 to enhance its position as Europe’s premier international rail terminal
 - Developed with our digital partners, Paythru and Match2Blue
- ▶ Providing station and travel information as well as shopping offers
 - From both tenants in station and 3rd party groups (e.g. local hotels, attractions, tour operators...)
- ▶ App provide push notifications on in-station events and history of the station
 - Controlled by user settings



Contents

Airport and travel hub commercial planning

A scientific approach to realising commercial potential

January 2015

1. Introduction to Javelin Group
2. What we do
3. Our skills
4. Case studies
5. **Our team**

Robin Bevan and Alex Evered lead a team of 14 locations specialists at Javelin Group

► Robin Bevan, Director, leads our work in the transport sector

- Director of Javelin Group's Locations & Analytics practice since 2004
- 25 years in store location planning, shopping centre research and international expansion for retailers / investors
- Key transport client experience includes: AENA, AerRianta, Aldeasa, BAA, British Airways, DAA, easyjet, HS1, Irish Ferries, Manchester Airport Group, Network Rail, Rail Delivery Group, Transport for London, Virgin Atlantic

► Alex Evered, Consulting Manager

- 16 years of experience in store strategy work, including:
 - Sainsbury's location planning team, DTZ's European Retail Team and Pragma Consulting
- Travel hub experience:
 - Air: Aeroporti Di Roma, Aer Rianta, ADP, BAA, British Airways, Bergen Airport, Birmingham Airport, Copenhagen Airport, Düsseldorf Airport, Enfidha Airport (Tunisia), Kuala Lumpur Airport, Malta Airport, Mumbai Airport, Manchester Airport Group, Newcastle Airport, Paris CDG, Varna and Bourgas Airports (Bulgaria).
 - Rail/Bus: First Great Western, HS1, Network Rail, TfL



Team of dedicated retail locations specialists

- ▶ Robin Bevan, Director
- ▶ Andy Leung, Associate Director
- ▶ Carl Bradbrook, Associate Director
- ▶ Alex Evered, Consulting Manager
- ▶ Steve Hoad, Consulting Manager
- ▶ Paddy Gamble, Consulting Manager
- ▶ Paul Matthews, Consulting Manager
- ▶ Emma Sharman, Senior Consultant
- ▶ Joe Lipski, Senior Consultant
- ▶ Nicola Pierce, Senior Consultant
- ▶ Ross Harding, Consultant
- ▶ Laura Short, Consultant
- ▶ Rachael Bedford (Intern)
- ▶ Sophie Feeney (Intern)





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javelin group

STRATEGIC RETAIL TRANSFORMATION