DFWC Quarterly Global Shopping Monitor

Q1 2018

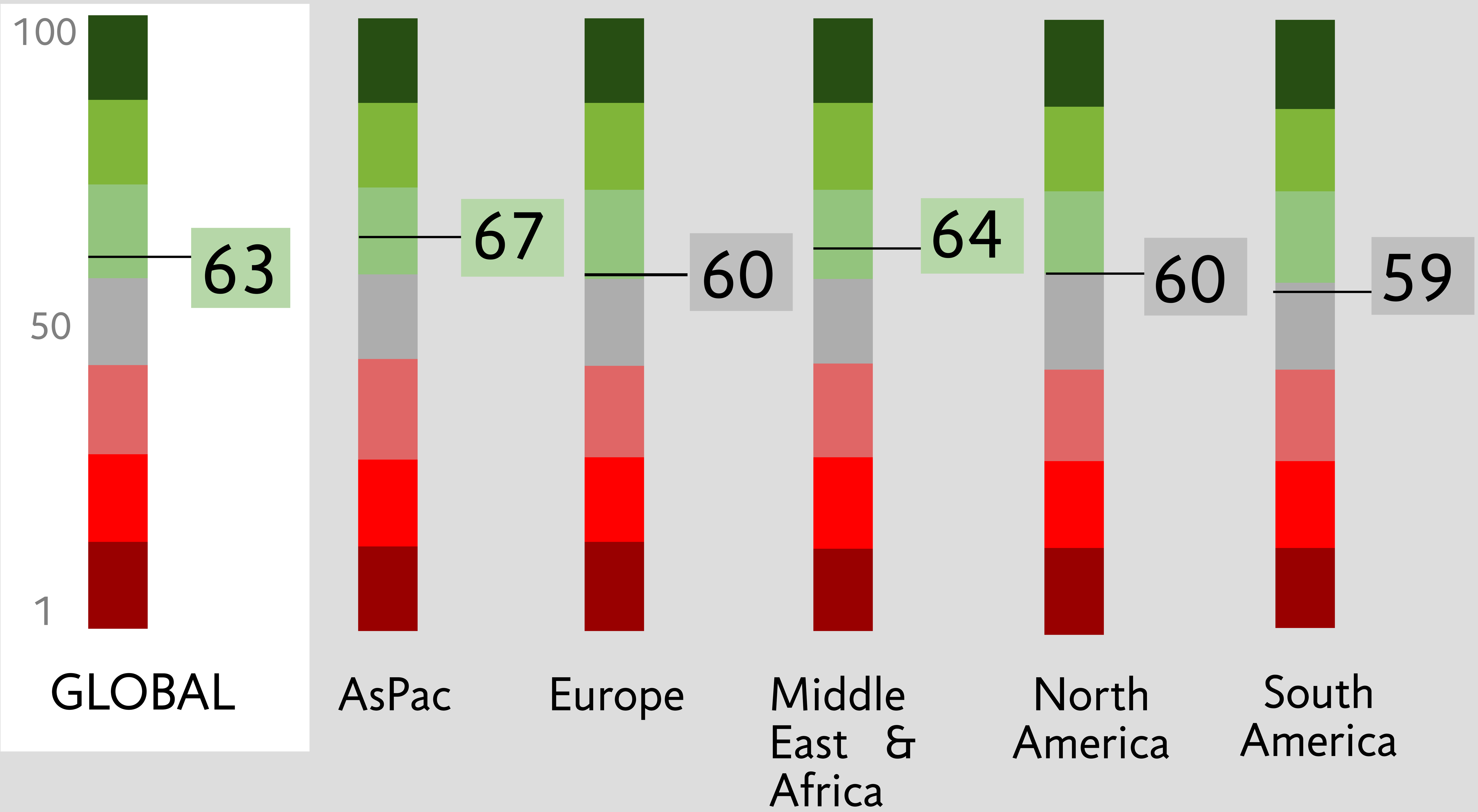
DFWC
DUTY FREE WORLD COUNCIL
Serving duty free and travel retail worldwide

in partnership with m1nd-set

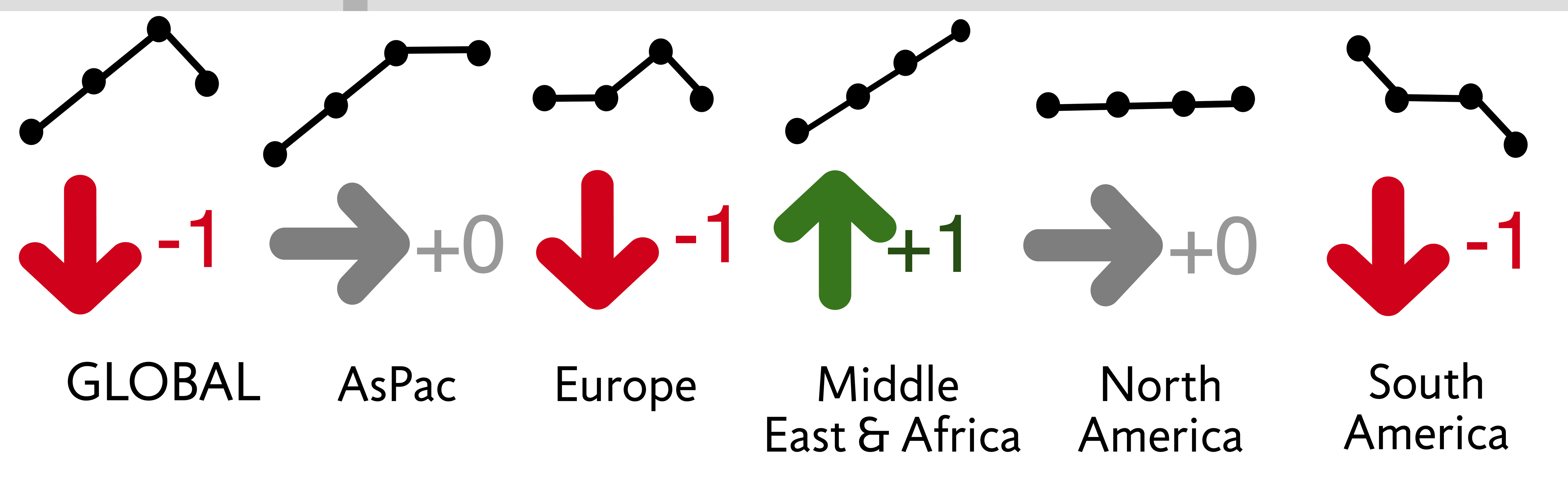
m1nd-set
expert in travel market research

CUSTOMER SATISFACTION INDEX

Computed by aggregating the satisfaction scores on all aspects of the DF visit, and weighting these in function of their impact on the overall satisfaction



EVOLUTION (vs Q4 2017 and trend over last 4 quarters)



DDS An ARC/IATA Product

AIR TRAFFIC

Total International Pax in Q1 2018 and % of growth Y-o-Y (vs Q1 2017)

TOTAL	EUROPE	ASPAC	NORTH AMERICA	MIDDLE EAST	LATAM	AFRICA
679 M	287 M	190 M	62 M	58 M	54 M	29 M
+8%	+8%	+9%	+7%	+2%	+7%	+8%

PERCEPTION OF DF SHOPPING

(Q1 2018 & trend over last 4 quarters)

% OF TRAVELLERS WHO AGREE	GLOBAL	TREND
Part of the travel experience	46%	
More motivated to buy "DF exclusives"	42%	
Variety of products makes DF a great place for shopping.	41%	
Great place to buy gifts	41%	

% OF TRAVELLERS WHO AGREE	GLOBAL	TREND
Great place to try new brands	32%	
Truly different experience	31%	
Exclusive and unique products	29%	
Prices are usually cheaper	24%	

IMPACT ON OVERALL SATISFACTION: MOST IMPACTFUL ASPECTS OF THE DF VISIT

#1 Value for Money

#2 Service level

#3 Uniqueness of products/services

#4 Variety & range of products

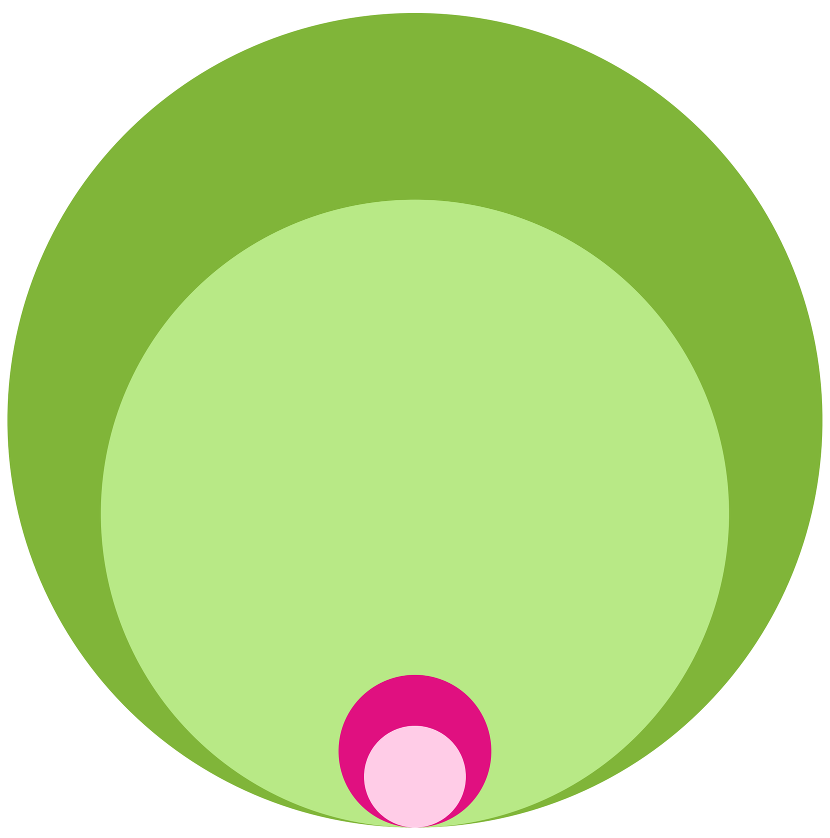
#5 Range of affordable products

The most impactful aspects of the DF visit are similar across regions

TOP 10 REASONS FOR BUYING IN DF

#1	Price Advantage	34%
#2	Value for money	33%
#3	Not found at home	25%
#4	Convenient	25%
#5	Suitable as gift	23%
#6	Enough time to choose	22%
#7	One of my favourites	21%
#8	Treat for myself	18%
#9	Souvenir from trip	18%
#10	Different from usual	17%

DESTINATION OF DF PURCHASE



SELF 47%

SHARE 9%

GIFT 37%

ON REQUEST 6%

REASONS FOR NOT VISITING DF SHOPS

- **#1** No visible motivating promotions
- **#2** Unwillingness to carry more items
- **#3** Decide / prefer to do other things (e.g. F&B)
- **#4** More expensive vs. shops at home
- **#5** Unavailability of usual products
- **#6** Lack of affordable products

REASONS FOR NOT BUYING IN DF SHOPS

- **#1** No motivating promotions
- **#2** High prices vs home country
- **#3** No new and interesting products
- **#4** Nothing really attractive
- **#5** Wanted to compare prices
- **#6** High prices vs destination country
- **#7** No broad range of products
- **#8** Nothing suitable for gifting
- **#9** Lack of suitable souvenirs
- **#10** No DF Exclusive products

SAMPLE

N=4000 online interviews with travellers

COVERAGE

AsPac (40%)
Europe (31%)
Americas (19%)
MEA (10%)

TIMELINE

Fieldwork in March 2018

Full report with results globally and by regions available. Please contact m1nd-set for more information.