DFWC Quarterly Global Shopping Monitor

Q2 2018

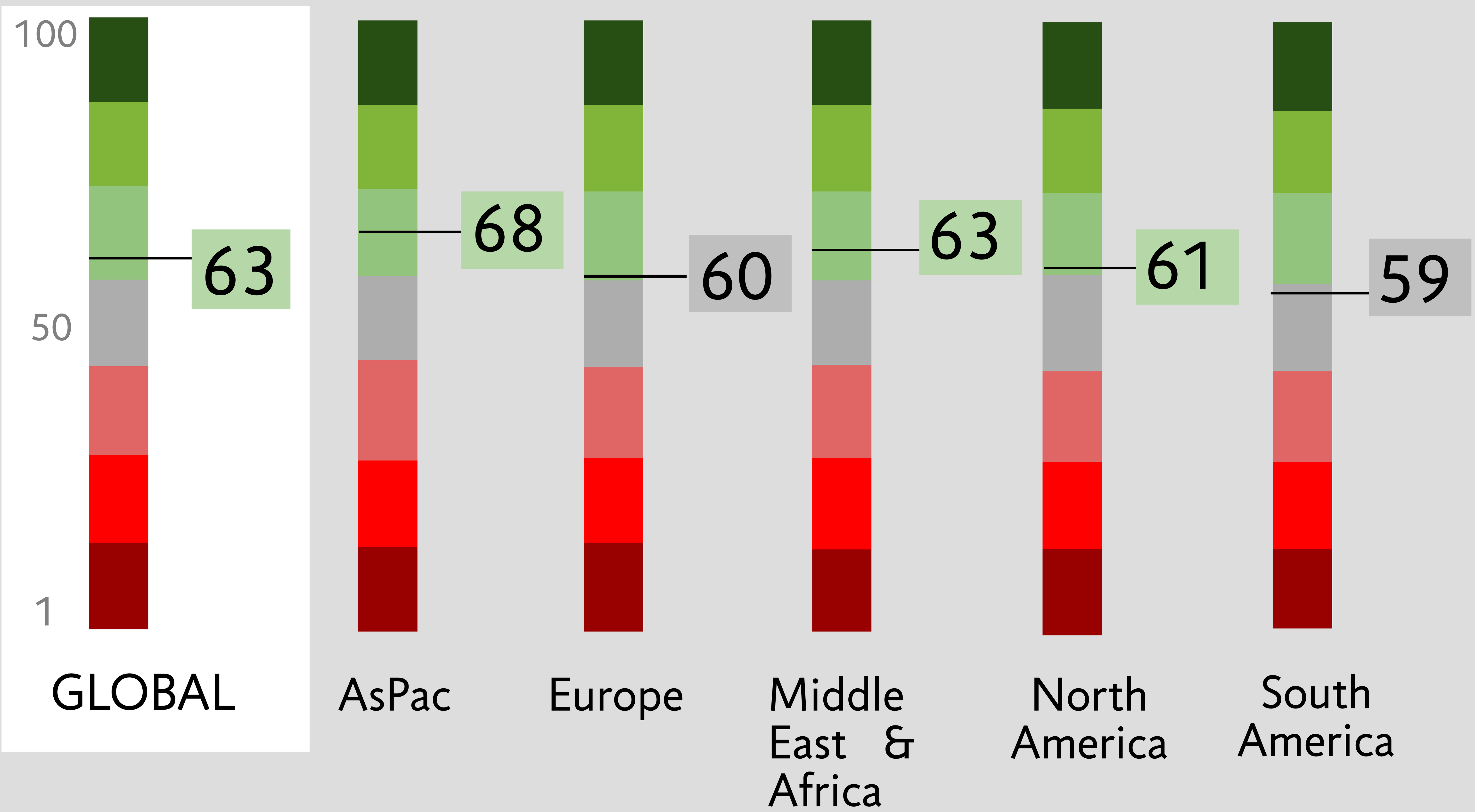
DFWC
DUTY FREE WORLD COUNCIL
Serving duty free and travel retail worldwide

in partnership with m1nd-set

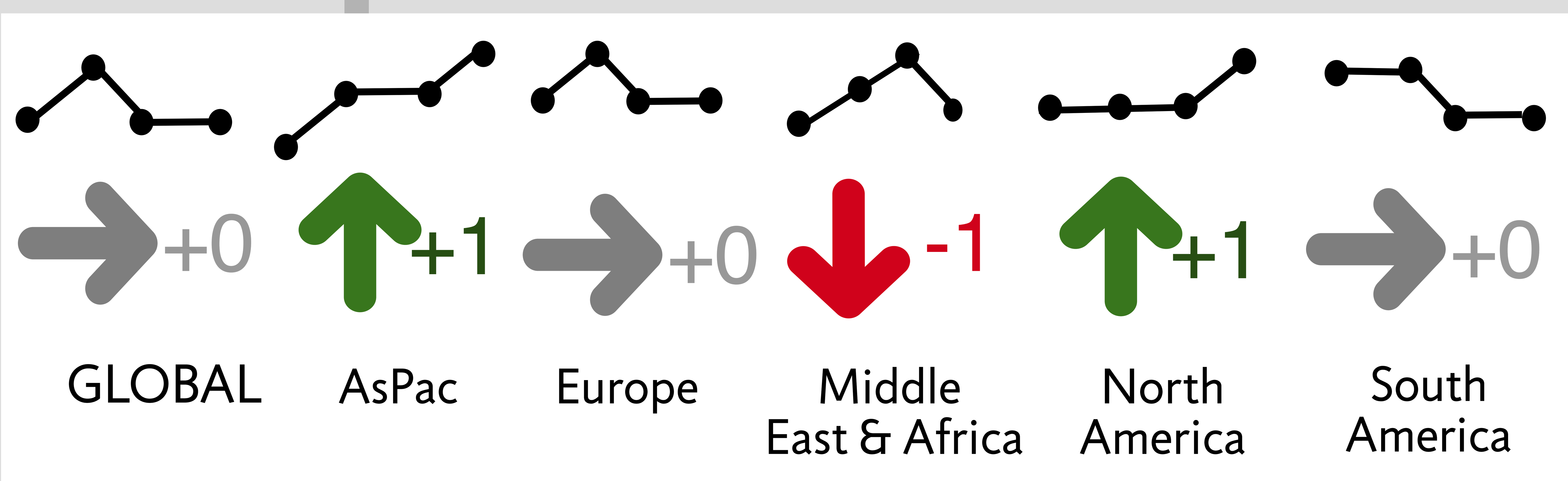
m1nd-set
expert in travel market research

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 Q1 2018 and trend over last 4 quarters)



DDS An ARC/IATA Product

AIR TRAFFIC

Total International Pax in Q2 2018 and % of growth Y-o-Y (vs Q2 2017)

TOTAL	EUROPE	ASPAC	NORTH AMERICA	MIDDLE EAST	LATAM	AFRICA
831M	400 M	225 M	68 M	59 M	50 M	29 M
+7%	+6%	+11%	+2%	+2%	+5%	+4%

PERCEPTION OF DF SHOPPING

(Q2 2018 & trend over last 4 quarters)

% OF TRAVELLERS WHO AGREE	GLOBAL	TREND
Part of the travel experience	47%	
More motivated to buy "DF exclusives"	42%	
Variety of products makes DF a great place for shopping.	42%	
Great place to buy gifts	42%	

% OF TRAVELLERS WHO AGREE	GLOBAL	TREND
Great place to try new brands	35%	
Truly different experience	31%	
Exclusive and unique products	30%	
Prices are usually cheaper	23%	

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

#1 Value for Money

#2 Uniqueness of products/services

#3 Variety & range of products

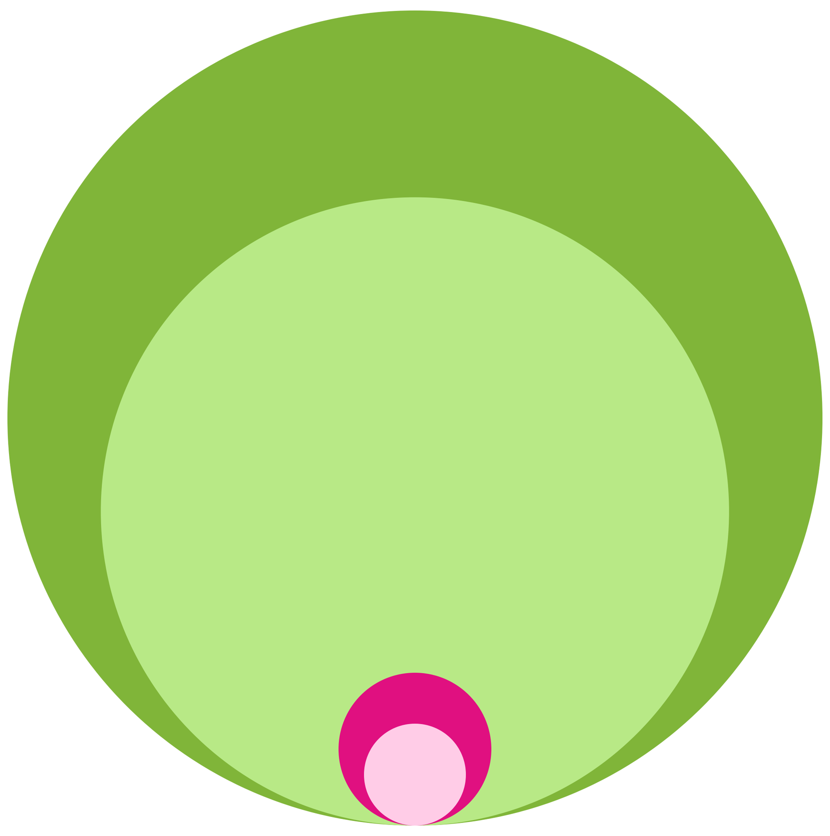
#4 Service level

#5 Range of affordable products

TOP 10 REASONS FOR BUYING IN DF

#1	Price Advantage	34%
#2	Value for money	31%
#3	Convenient	25%
#4	Suitable as gift	24%
#5	Not found at home	23%
#6	Enough time to choose	22%
#7	One of my favourites	21%
#8	Treat for myself	21%
#9	Souvenir from trip	20%
#10	Different from usual	18%

DESTINATION OF DF PURCHASE



SELF 46%

SHARE 10%

GIFT 37%

ON REQUEST 6%

REASONS FOR NOT VISITING DF SHOPS

#1 No visible motivating promotions

#2 Unwillingness to carry more items

#3 More expensive vs. shops at home

#4 Decide / prefer to do other things (e.g. F&B)

#5 Unavailability of usual products

#6 Lack of affordable products

REASONS FOR NOT BUYING IN DF SHOPS

#1 High prices vs home country

#2 No motivating promotions

#3 No new and interesting products

#4 High prices vs destination country

#5 Wanted to compare prices

#6 Nothing really attractive

#7 No broad range of products

#8 Nothing suitable for gifting

#9 Lack of suitable souvenirs

#10 No DF Exclusive products

SAMPLE

N=4012 online interviews with travellers

COVERAGE

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

TIMELINE

Fieldwork in June 2018

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