



# DFWC Quarterly Global Shopping Monitor



## Q3 2018

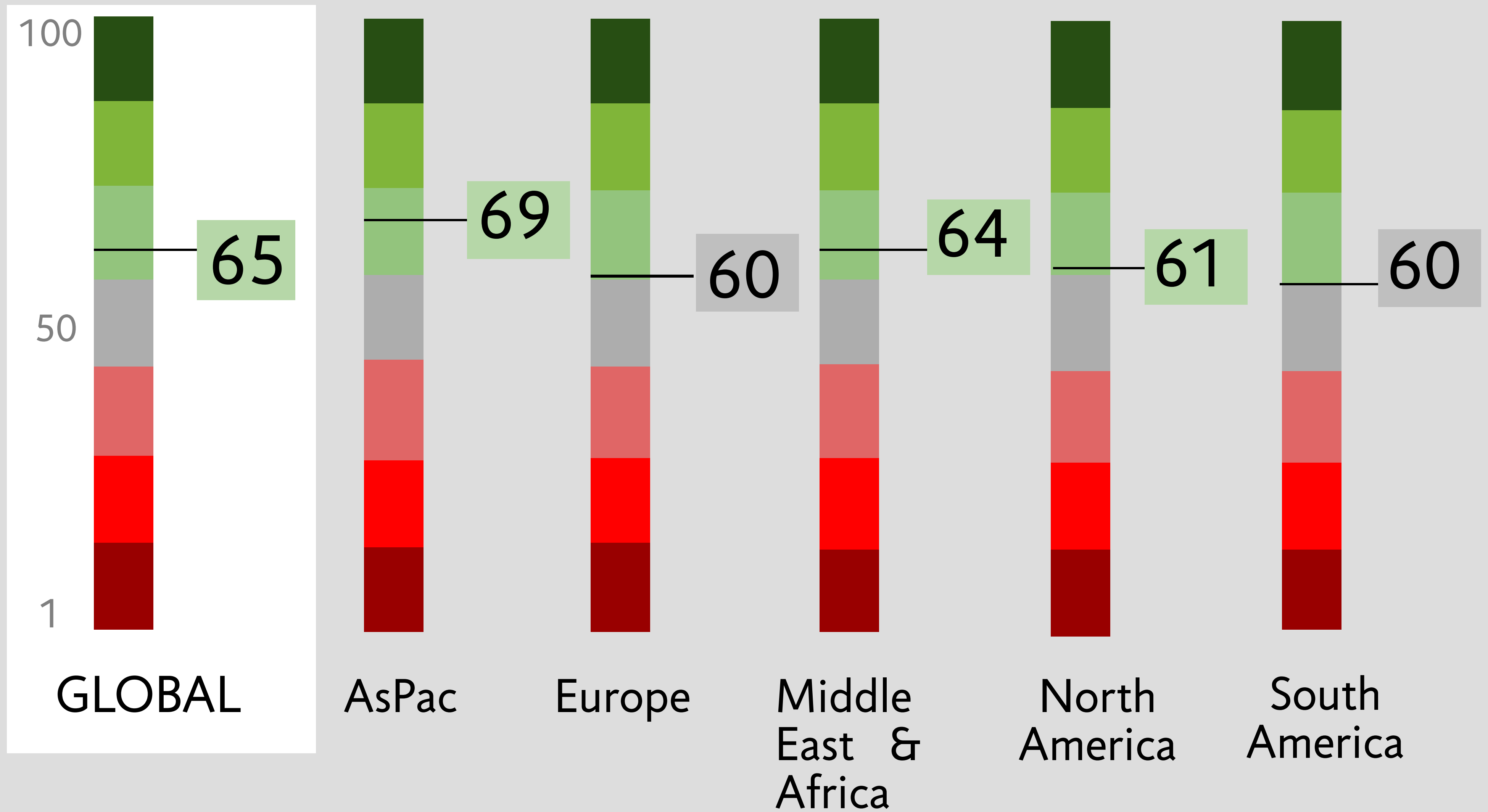


in partnership with m1nd-set

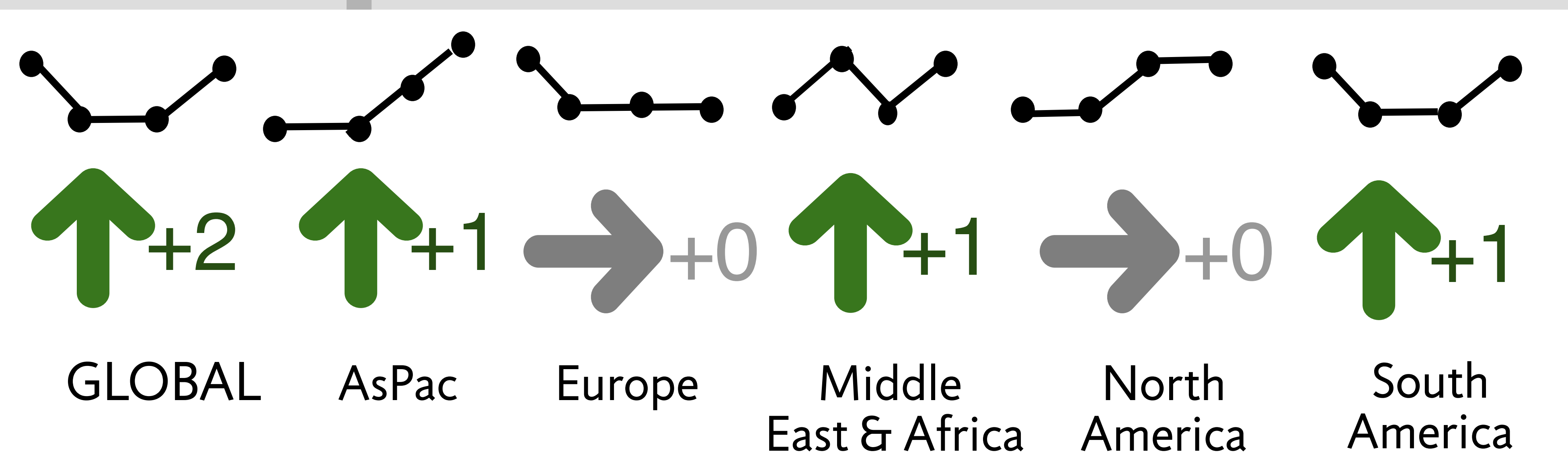


### CUSTOMER SATISFACTION INDEX

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 Q2 2018 and trend over last 4 quarters)



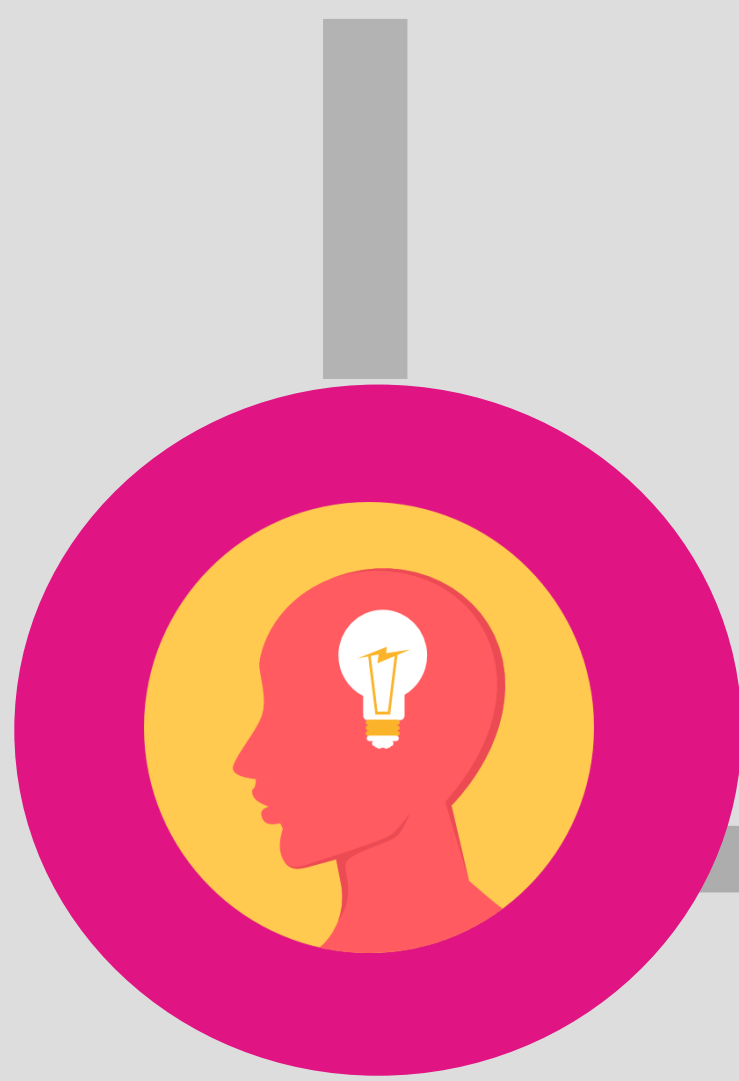


# AIR TRAFFIC

Total International Pax in Q3 2018 and % of growth Y-o-Y (vs Q3 2017)


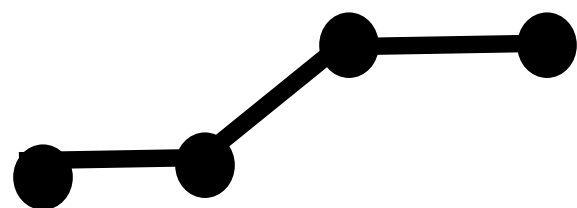
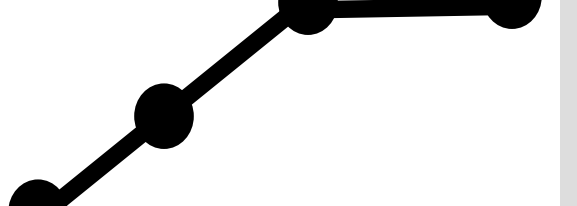

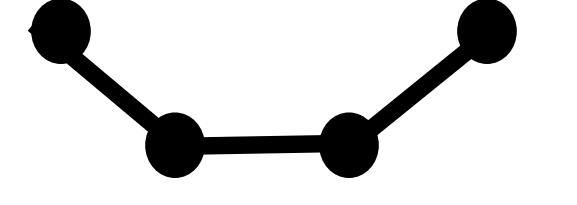
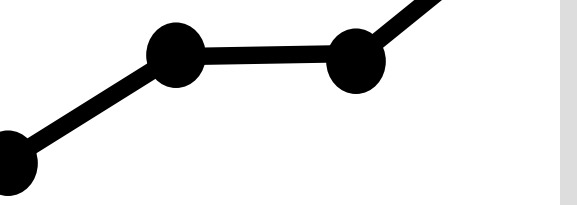

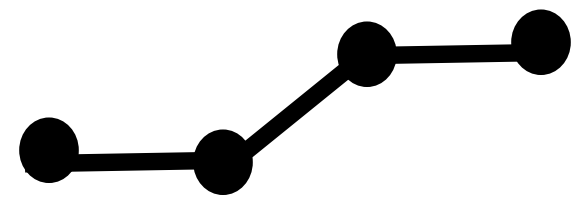
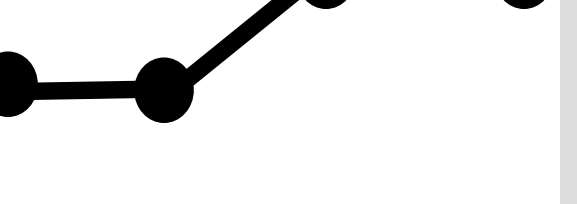

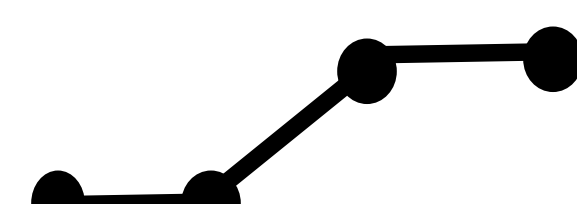
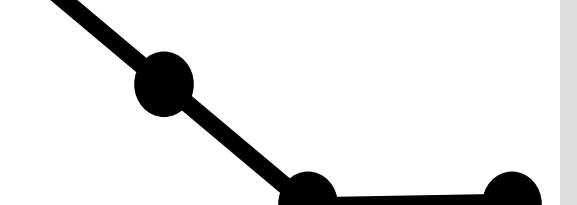
**TOTAL**  
**945M**  
**+7%**

EUROPE	ASPAC	NORTH AMERICA	MIDDLE EAST	LATAM	AFRICA
484 M	235 M	75 M	65 M	51 M	35 M
+8%	+8%	+6%	+5%	+3%	+4%






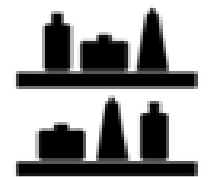

## PERCEPTION OF DF SHOPPING

(Q3 2018 & trend over last 4 quarters)

	% OF TRAVELLERS WHO AGREE		% OF TRAVELLERS WHO AGREE	
	GLOBAL	TREND	GLOBAL	TREND
Part of the travel experience 	47%		35%	
More motivated to buy "DF exclusives" 	43%		32%	
Variety of products makes DF a great place for shopping. 	42%		30%	
Great place to buy gifts 	42%		23%	



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

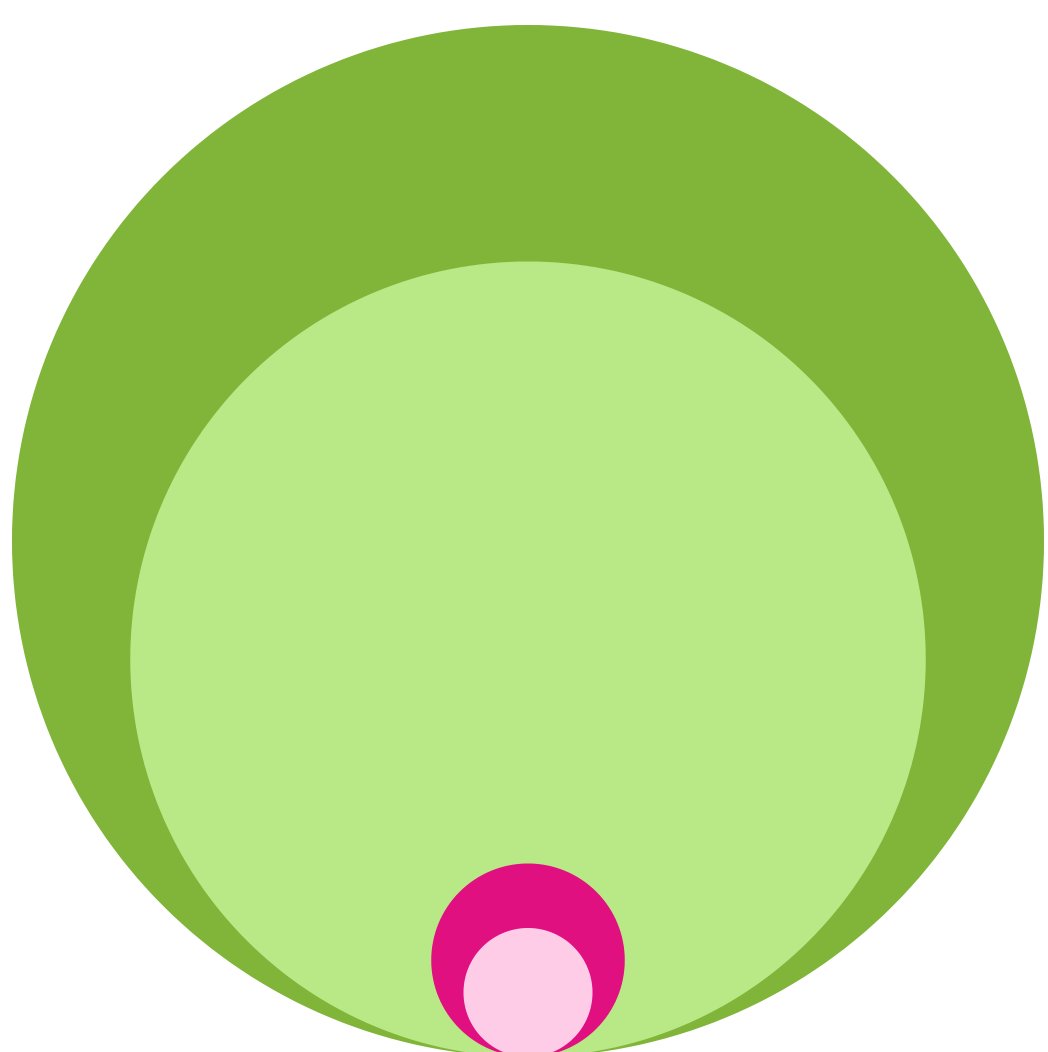
- #1 Value for Money 
- #2 Uniqueness of products/services 
- #3 Variety & range of products
- #4 Service level  
- #5 Range of affordable products 



## TOP 10 REASONS FOR BUYING IN DF

- |                                 |                                      |
|---------------------------------|--------------------------------------|
| #1 Price Advantage <b>34%</b>   | #6 Different from usual <b>22%</b>   |
| #2 Value for money <b>31%</b>   | #7 One of my favourites <b>21%</b>   |
| #3 Convenient <b>27%</b>        | #8 Treat for myself <b>21%</b>       |
| #4 Suitable as gift <b>24%</b>  | #9 Souvenir from trip <b>20%</b>     |
| #5 Not found at home <b>24%</b> | #10 Enough time to choose <b>20%</b> |

## DESTINATION OF DF PURCHASE



SELF **44%**



SHARE **11%**








GIFT **38%**



ON REQUEST **6%**

## REASONS FOR NOT VISITING DF SHOPS

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

## REASONS FOR NOT BUYING IN DF SHOPS

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


**SAMPLE**

N=4001 online interviews with travellers



**COVERAGE**

AsPac (40%)  
Europe (30%)  
Americas (20%)  
MEA (10%)



**TIMELINE**

Fieldwork in September 2018

