

DFWC Quarterly Global Shopping Monitor

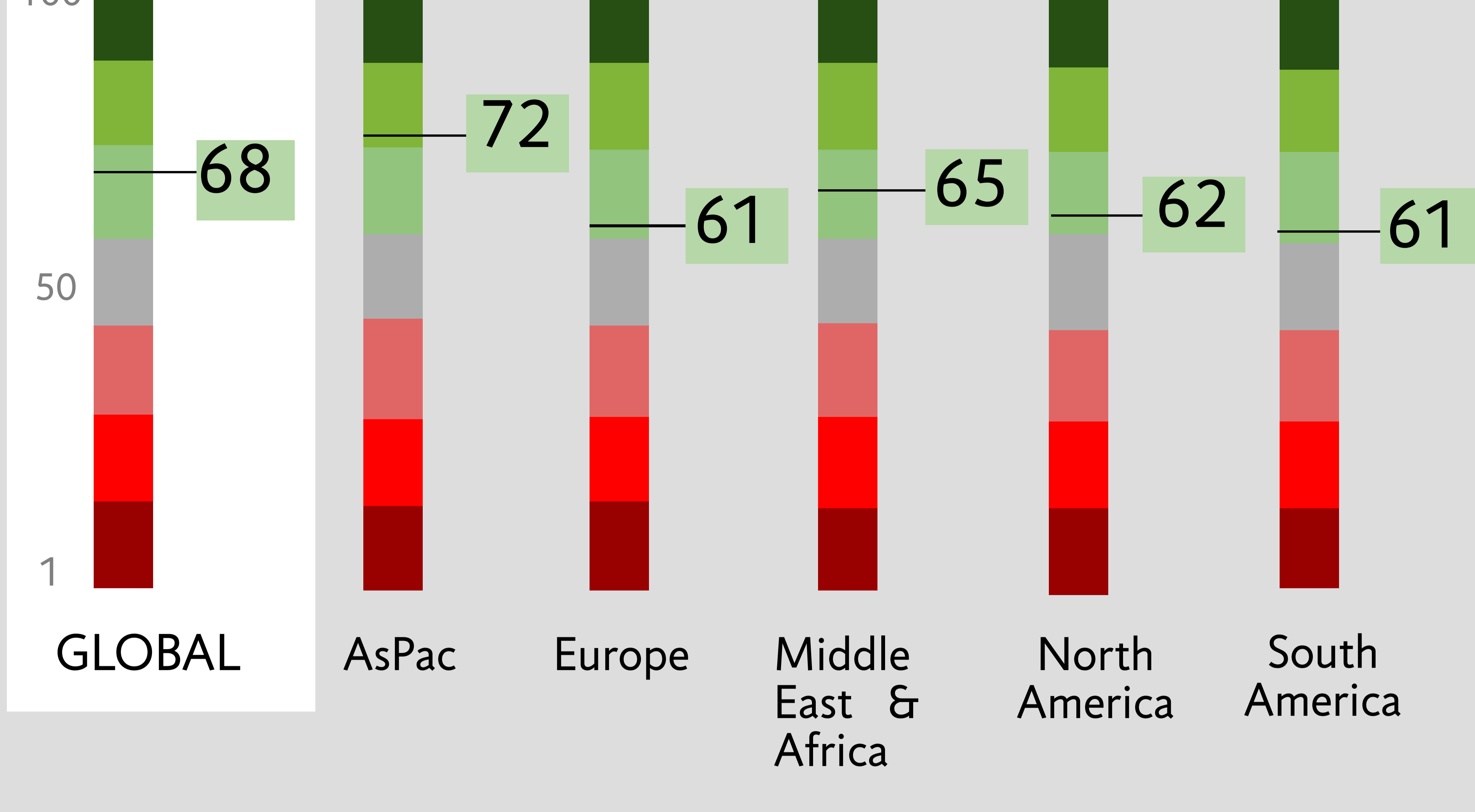
Q1 2019

in partnership with m1nd-set

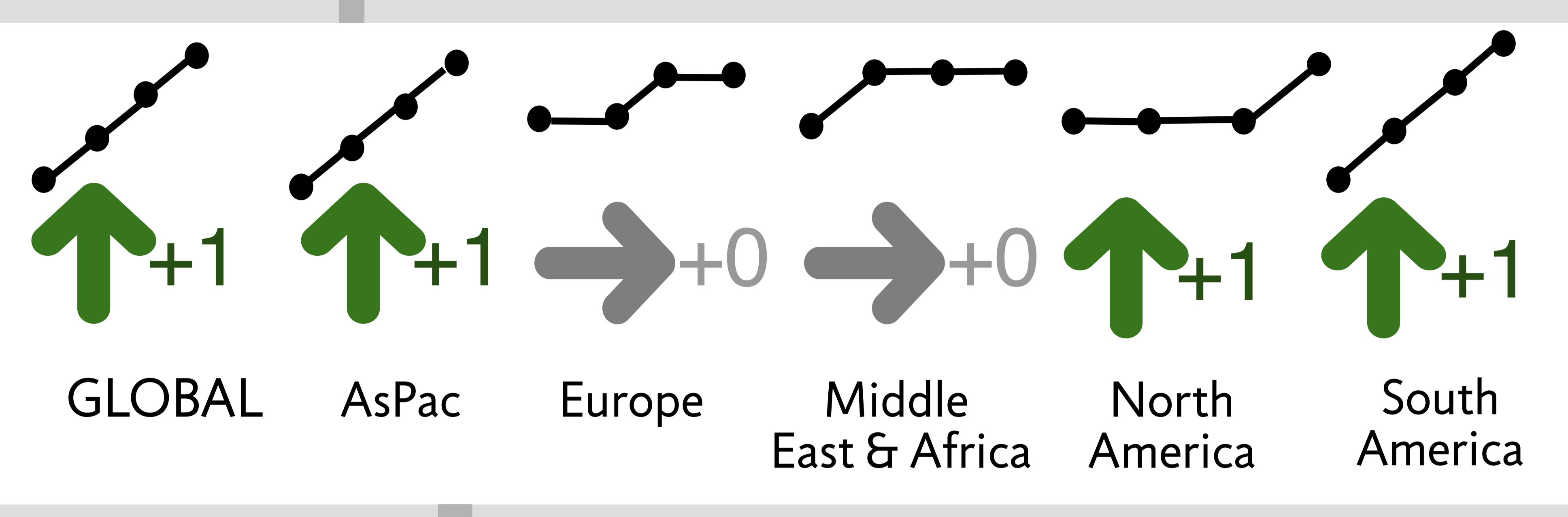


Computed by aggregating the satisfaction scores on all aspects of the DF visit, and weighting these in function of their impact on the overall satisfaction

CUSTOMER SATISFACTION INDEX



EVOLUTION (vs Q4 2018 and trend over last 4 quarters)



AIR TRAFFIC

Total International Pax in Q1 2019 and % of growth Y-o-Y (vs Q1 2018)

TOTAL	EUROPE	ASPAC	NORTH AMERICA	MIDDLE EAST	LATAM	AFRICA
753M	303 M	240 M	66 M	57 M	57 M	30 M
+4.9%	+5.5%	+5.6%	+4.9%	-0.3%	+3.1%	+7.3%

PERCEPTION OF DF SHOPPING

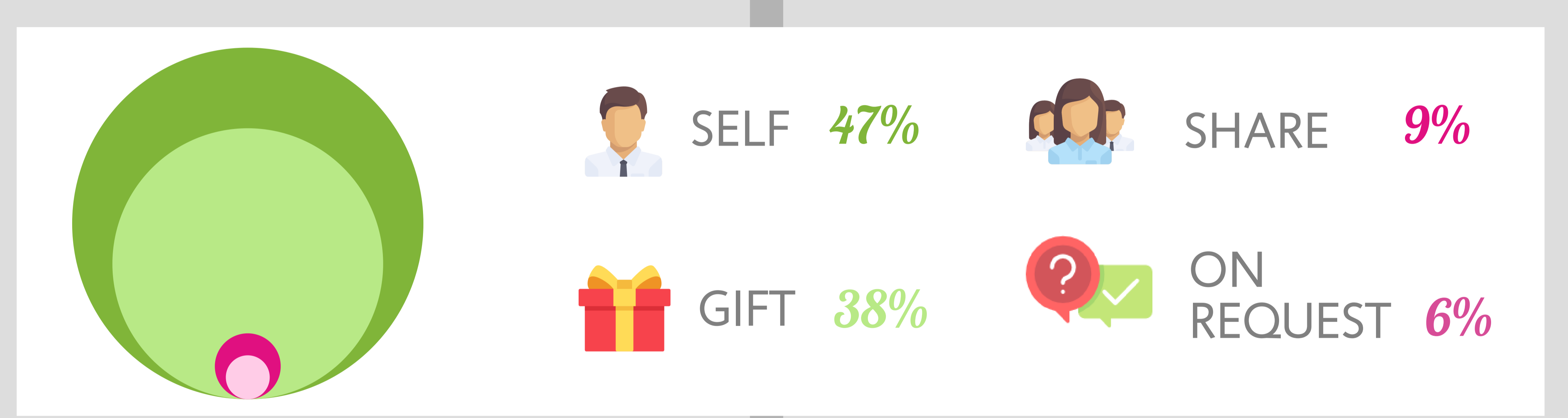
(Q1 2019 & trend over last 4 quarters)



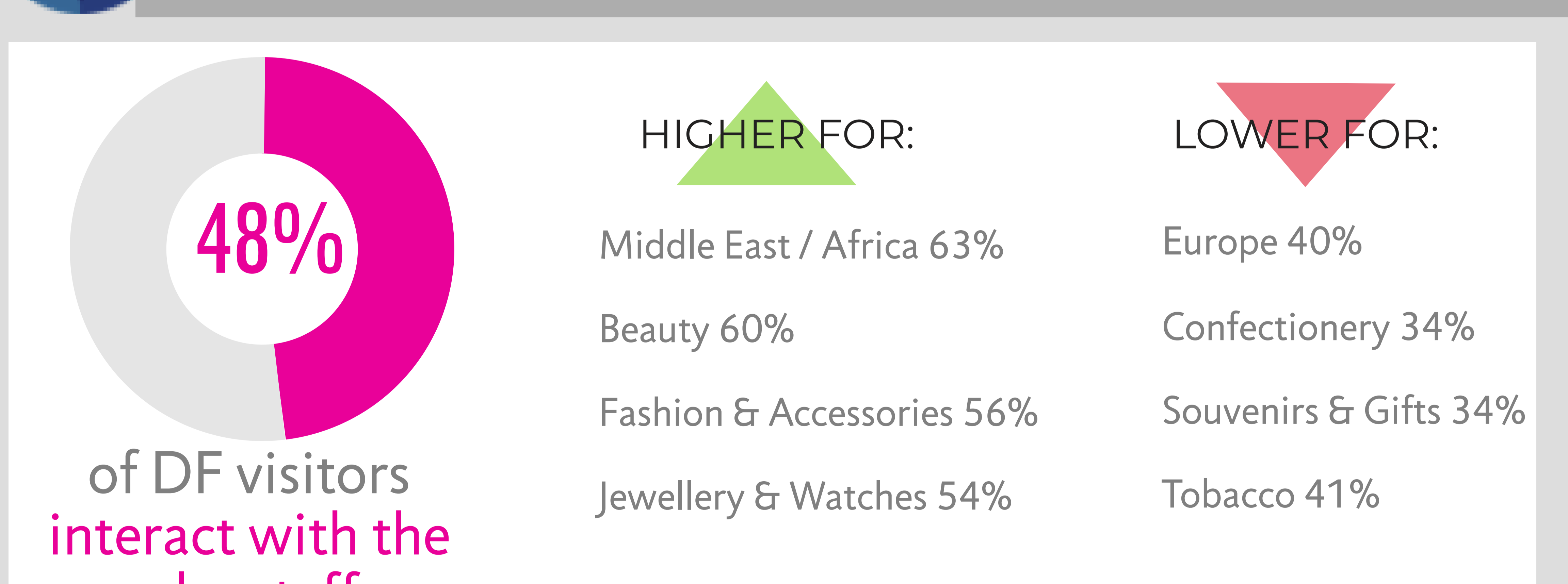
IMPACT ON OVERALL SATISFACTION: MOST IMPACTFUL ASPECTS OF THE DF VISIT

- #1 Value for Money
- #2 Service level
- #3 Uniqueness of products/services
- #4 Atmosphere / design of shops
- #5 Communication

DESTINATION OF DF PURCHASE



INTERACTION WITH SALES STAFF:



STAFF INFLUENCE ON PURCHASE DECISION:



SAMPLE

N=4010 online interviews with travellers

COVERAGE

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

TIMELINE

Fieldwork in March 2019