



DFWC QUARTERLY GLOBAL SHOPPING MONITOR



Q1 2020



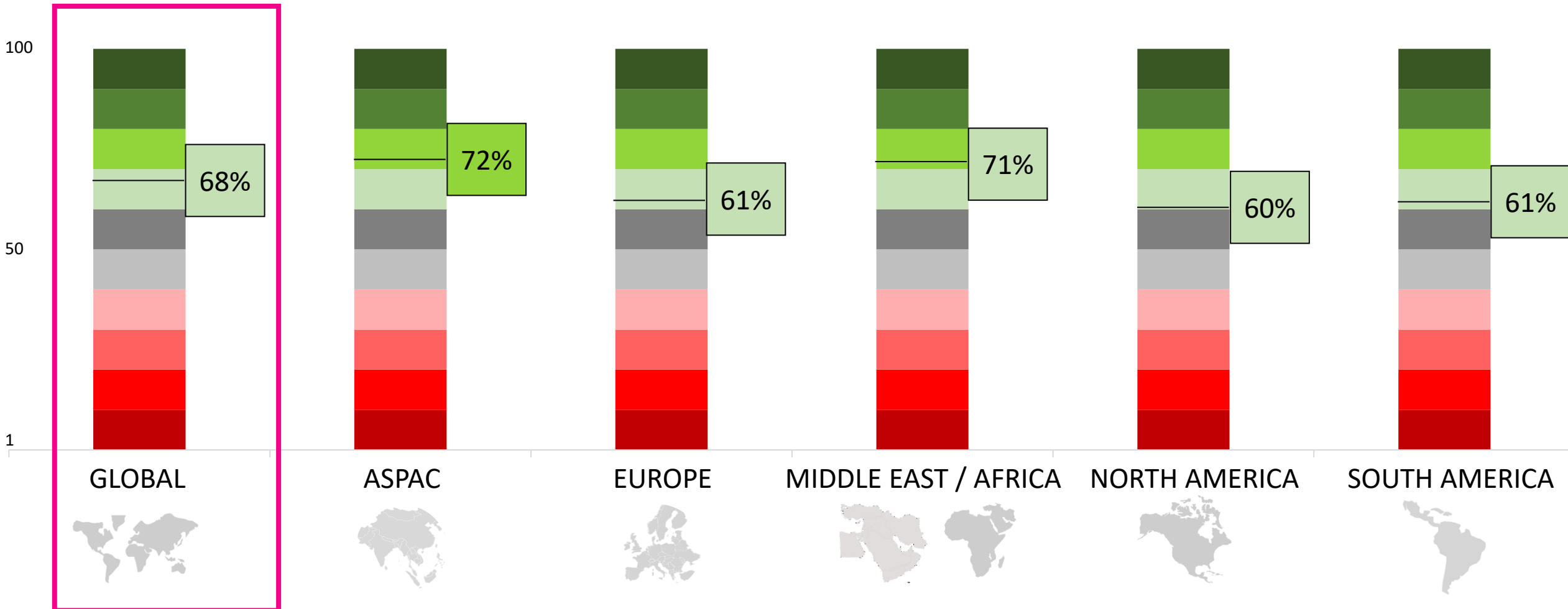
in partnership with





CUSTOMER SATISFACTION INDEX

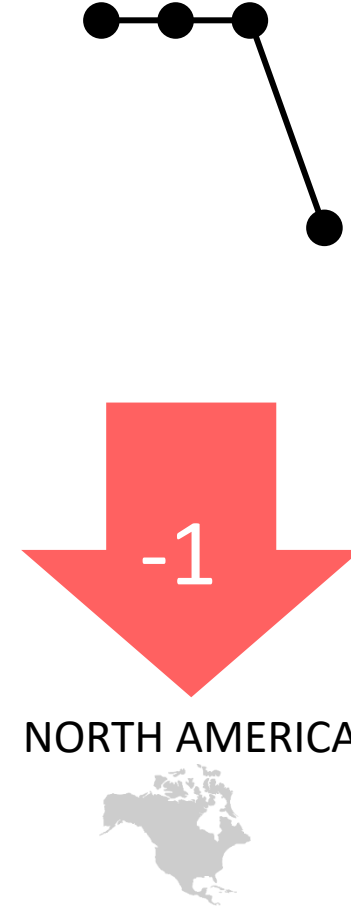
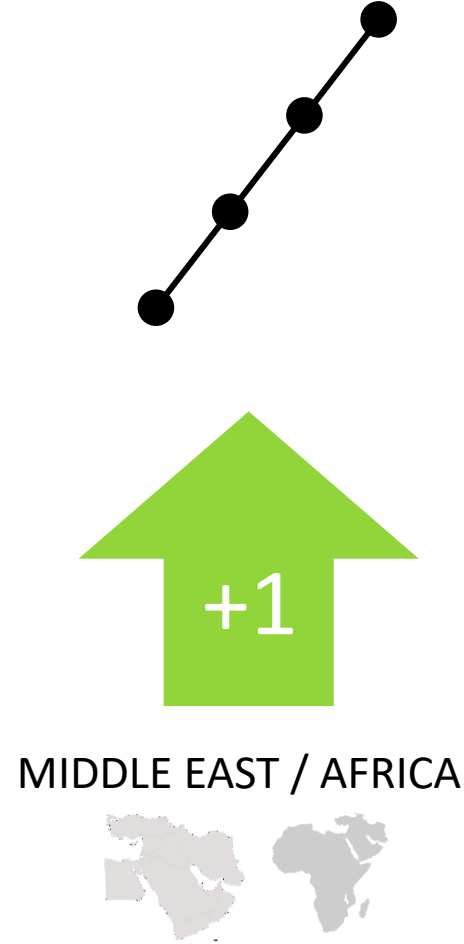
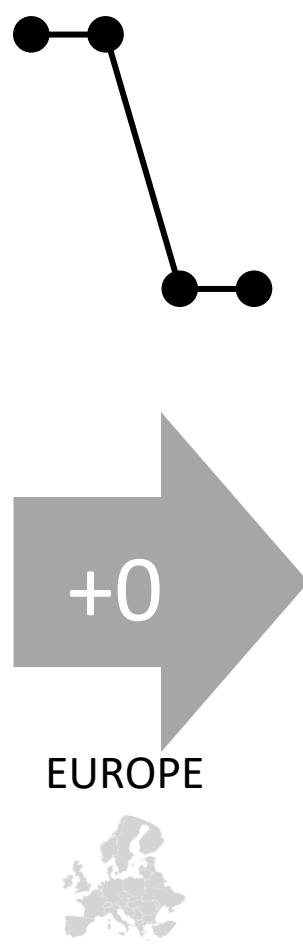
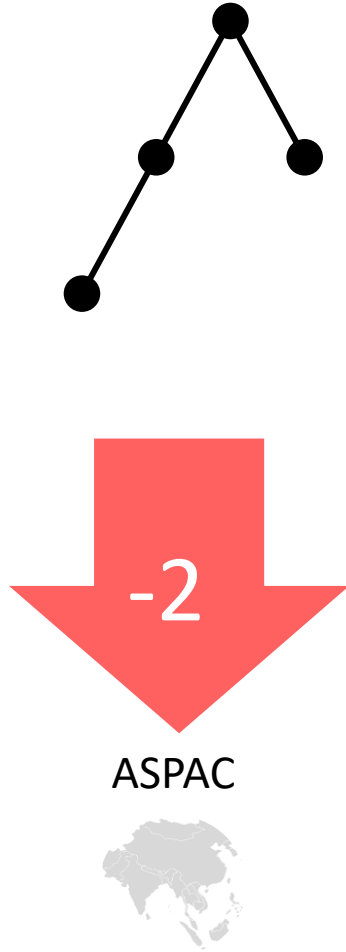
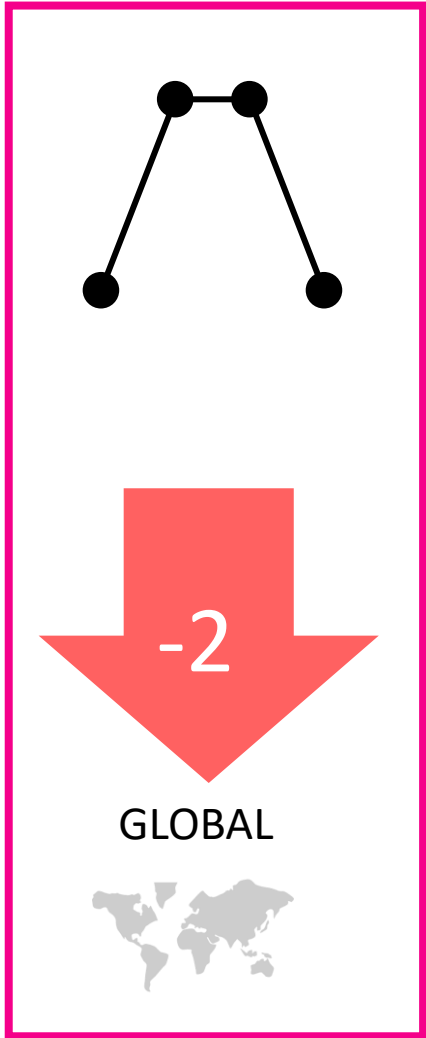
Computed by aggregating the satisfaction scores on all aspects of the DF visit, and weighting these in function of their impact on the overall satisfaction





EVOLUTION

(vs Q1 2019 and trend over last 4 quarters)





PERCEPTION OF DF SHOPPING

(Q1 2020 & trends over last 4 quarters)

% of travelers who agree

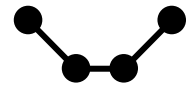
GLOBAL

TREND

Part of the travel experience



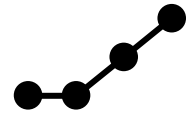
48%



Great place to try new brands



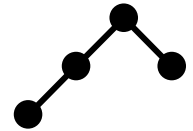
48%



Variety of products makes DF a great place for shopping



47%



More motivated to buy "DF exclusives"



45%



% of travelers who agree

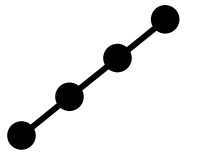
GLOBAL

TREND

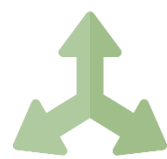
Great place to Buy gifts



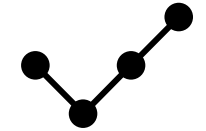
43%



Truly different experience



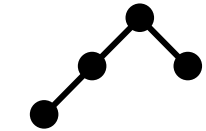
41%



Prices are usually cheaper



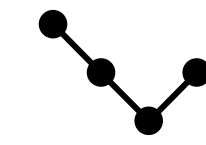
36%



Exclusive and unique products



30%





DESTINATION OF DF PURCHASE






IMPACT ON OVERALL SATISFACTION

#1 Value for Money 

#4 Atmosphere / design of shops 

#2 Range of products / variety 

#5 Service level 

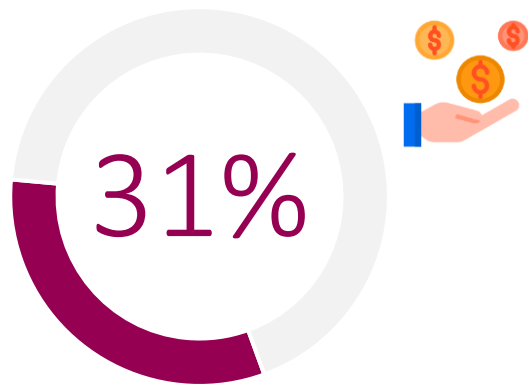
#3 Uniqueness of products and services 

#6 Communication 

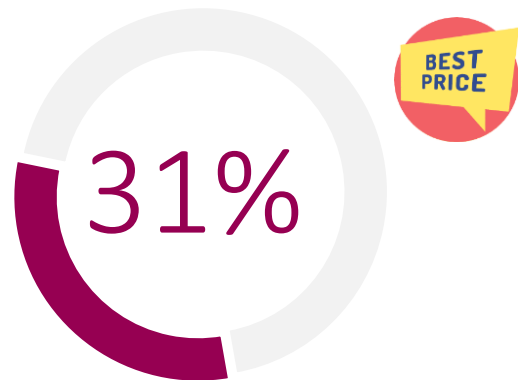


TOP REASONS FOR BUYING

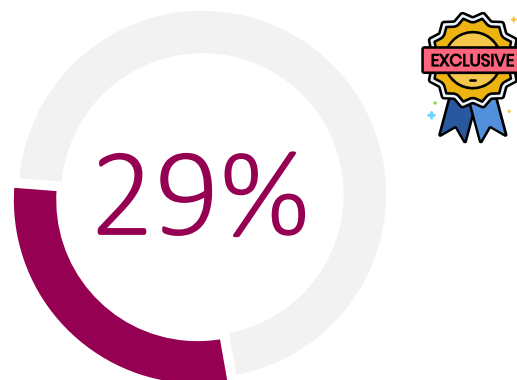
Price quality ratio



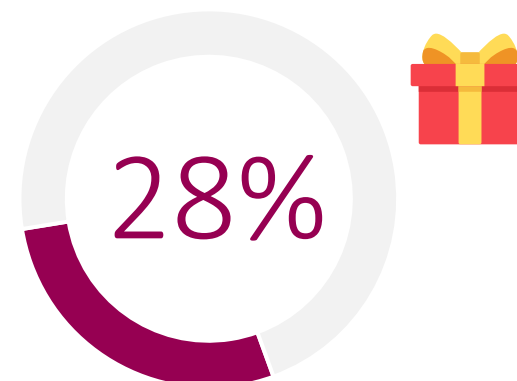
Price advantage



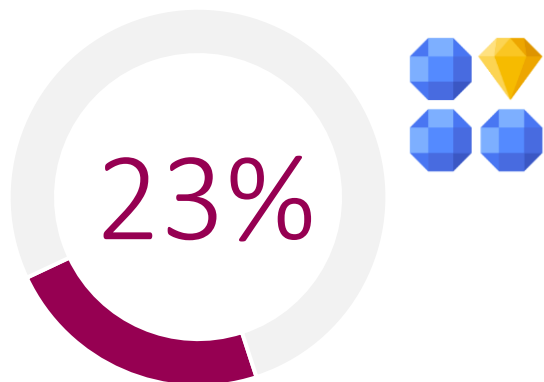
Product unable at home



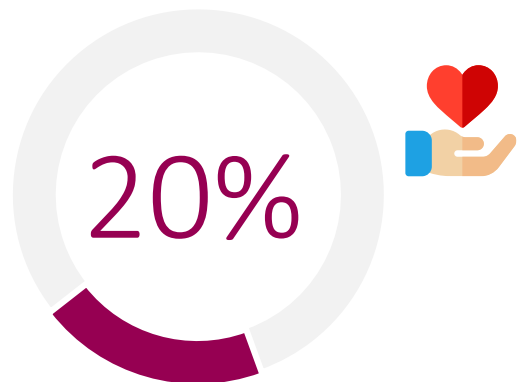
Suitable as a gift



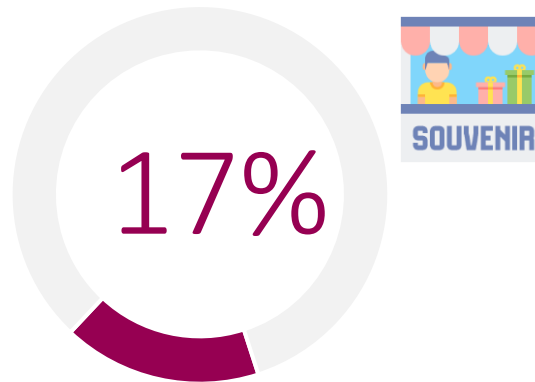
Different from usual



Loyalty to Brand



Souvenir from the trip

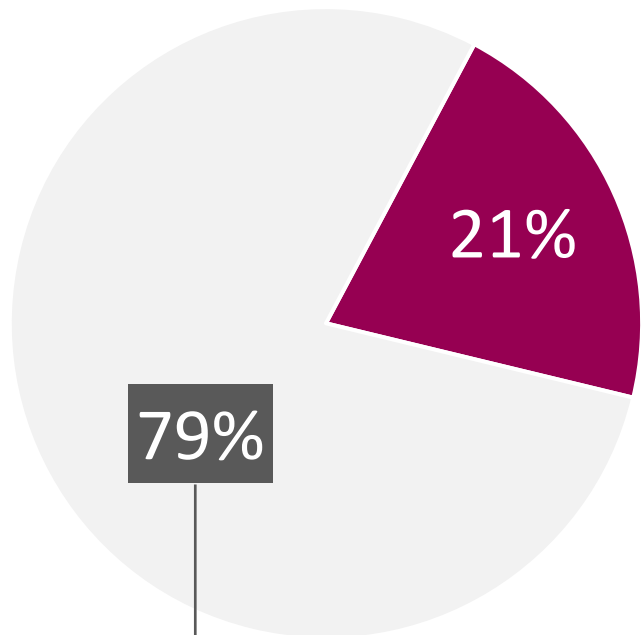


Convenience

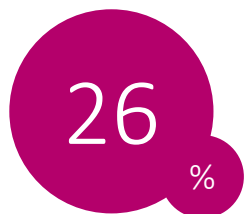




COVID-19 IMPACT ON SHOPPING BEHAVIOR



21% of usual DF visitors avoided browsing the Duty Free shop because of the Coronavirus



26% of travelers who visited the Duty Free shop spent less time inside than usual because of the Coronavirus

TOP 3 MOST IMPACTED CATEGORIES :

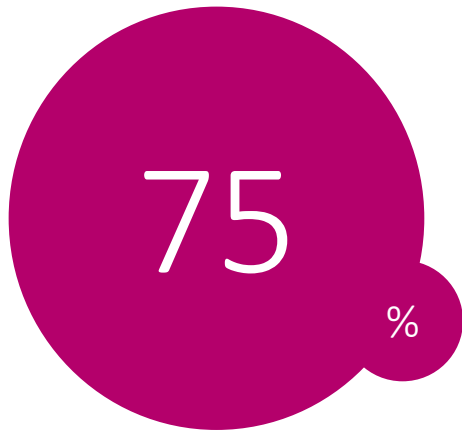
#1 Perfumes

#2 Alcohol

#3 Skincare



COVID-19 IMPACT ON SHOPPING BEHAVIOR



will avoid flying to specific destinations in the next 6 months

TOP 3 REGIONS AVOIDED:

#1

Asia

#2

Europe

#3

North America

SAMPLE

Over N=4005
online interviews
with travelers



COVERAGE

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



TIMELINE

Fieldwork in Q1
2020



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