DFWC
QUARTERLY GLOBAL SHOPPING MONITOR

Q4 2019

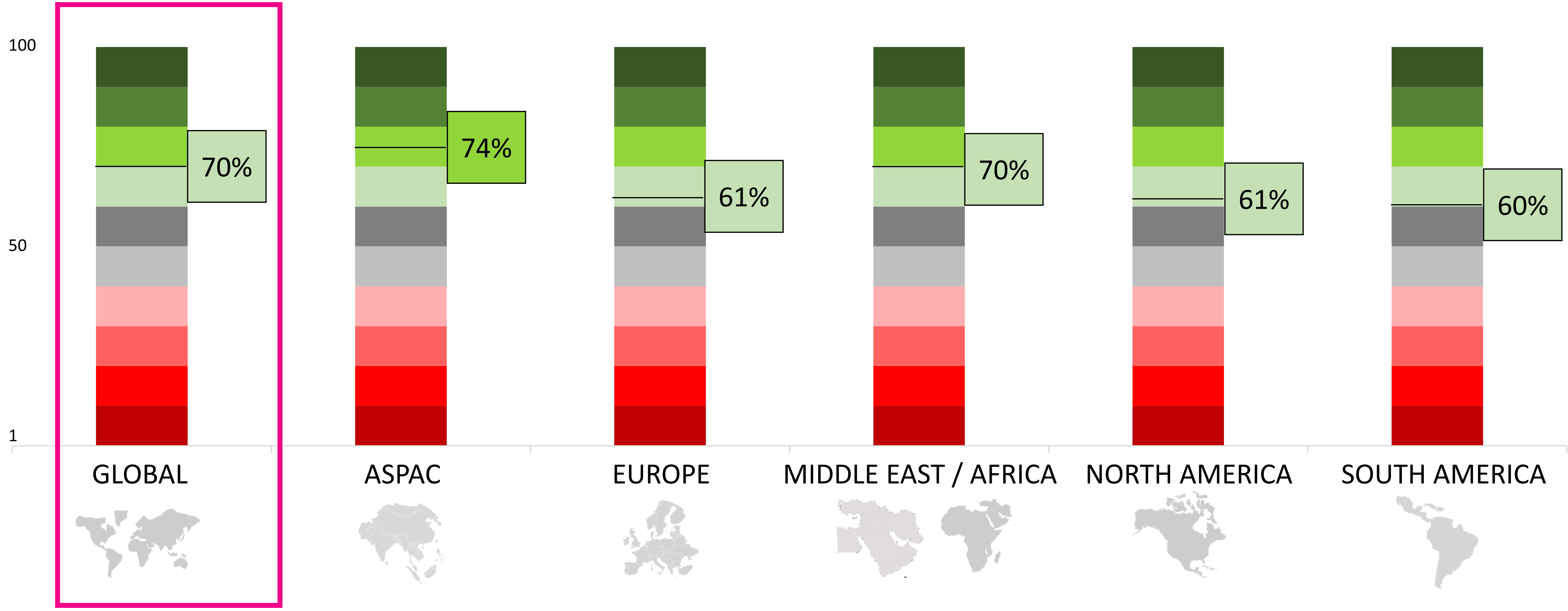
DUTY FREE WORLD COUNCIL
Serving duty free and travel retail worldwide

in partnership with

m1nd-set
expert in travel market research

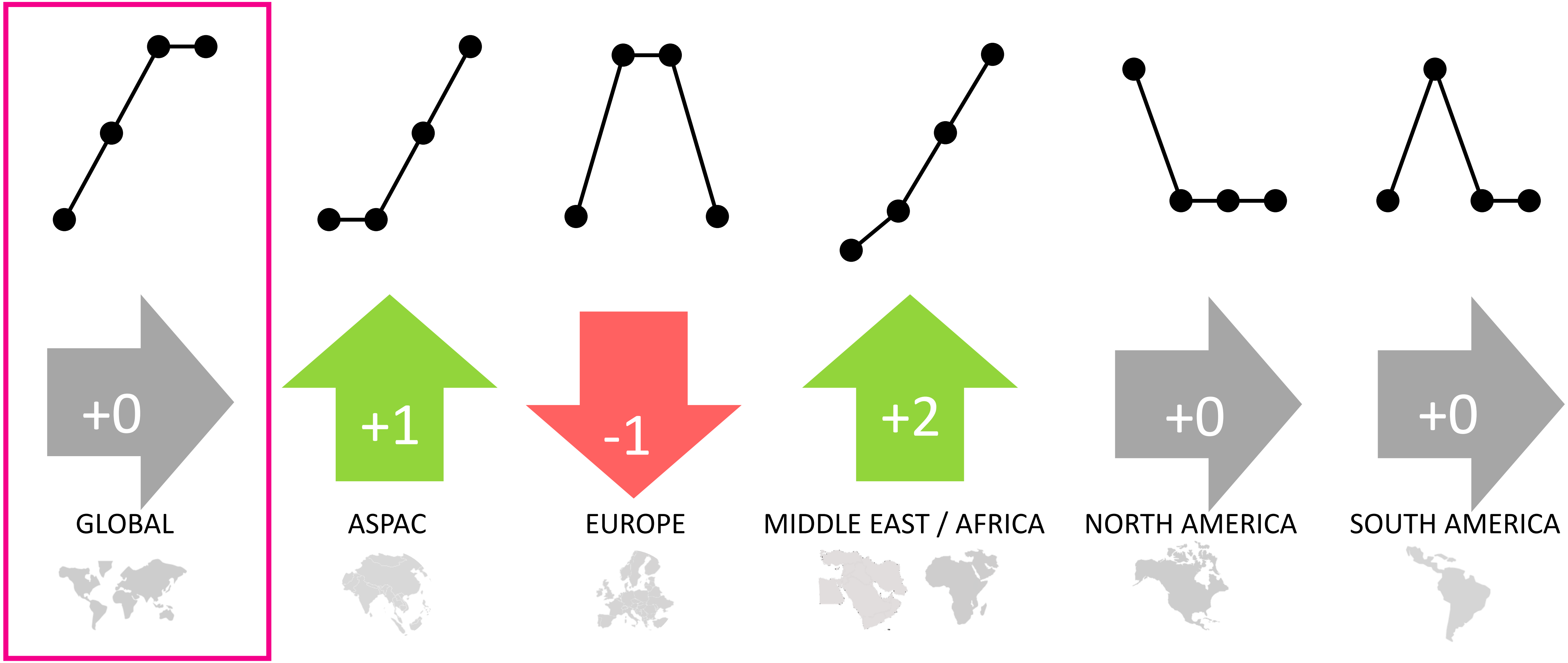
CUSTOMER SATISFACTION INDEX

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 Q3 2019 and trend over last 4 quarters)



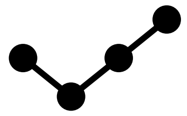
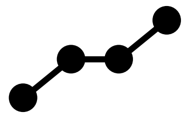
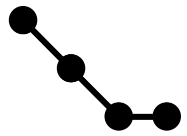
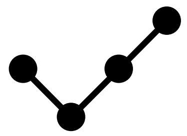
AIR TRAFFIC

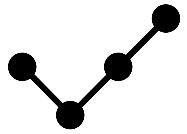
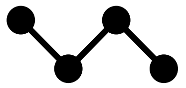
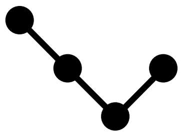
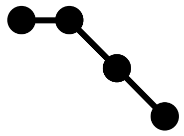
(Total international PAX in Q4 2019 and % of growth Y-O-Y (vs Q4 2018))

GLOBAL	ASPAC	EUROPE	MIDDLE EAST / AFRICA	NORTH AMERICA	SOUTH AMERICA
806 M	238 M	365 M	88 M	67 M	48 M
+ 2.6%	**+3.1%**	**+4.0%**	**+0.7%**	**-0.1%**	**- 2.0%**

PERCEPTION OF DF SHOPPING

(Q4 2019 & trends over last 4 quarters)

% of travelers who agree	GLOBAL	TREND
Variety of products makes DF a great place for shopping	48%	
Great place to try new brands	47%	
Part of the travel experience	46%	
Great place to Buy gifts	41%	

% of travelers who agree	GLOBAL	TREND
Prices are usually cheaper	40%	
More motivated to buy “DF exclusives”	36%	
Truly different experience	34%	
Exclusive and unique products	28%	

DESTINATION OF DF PURCHASE

44 %
Buy for themselves

43 %
Buy as a gift

8 %
Buy to share

5 %
Buy on request

TOP REASONS FOR BUYING

Price quality ratio

31%

Suitable as a gift

30%

Price advantage

29%

Product unavailable at home

26%

Loyalty to Brand

19%

Treat for Myself

17%

Different from usual

16%

Souvenir from the trip

13%

TOP BARRIERS TO PURCHASE

#1
No motivating promotion/ sales
37%

#2
Higher prices than home
32%

#3
Not attracted by any products
23%

#4
I wanted to compare prices
20%

#5
Unwilling to carry more items
19%

Lack of novelties
19%

#6
Buy elsewhere
17%

#7
Higher prices than destination
16%

COVERAGE

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

SAMPLE

Over N=4001
online interviews
with travelers

TIMELINE

Fieldwork in
December 2019

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