



DFWC QUARTERLY GLOBAL SHOPPING MONITOR



Q3 2019



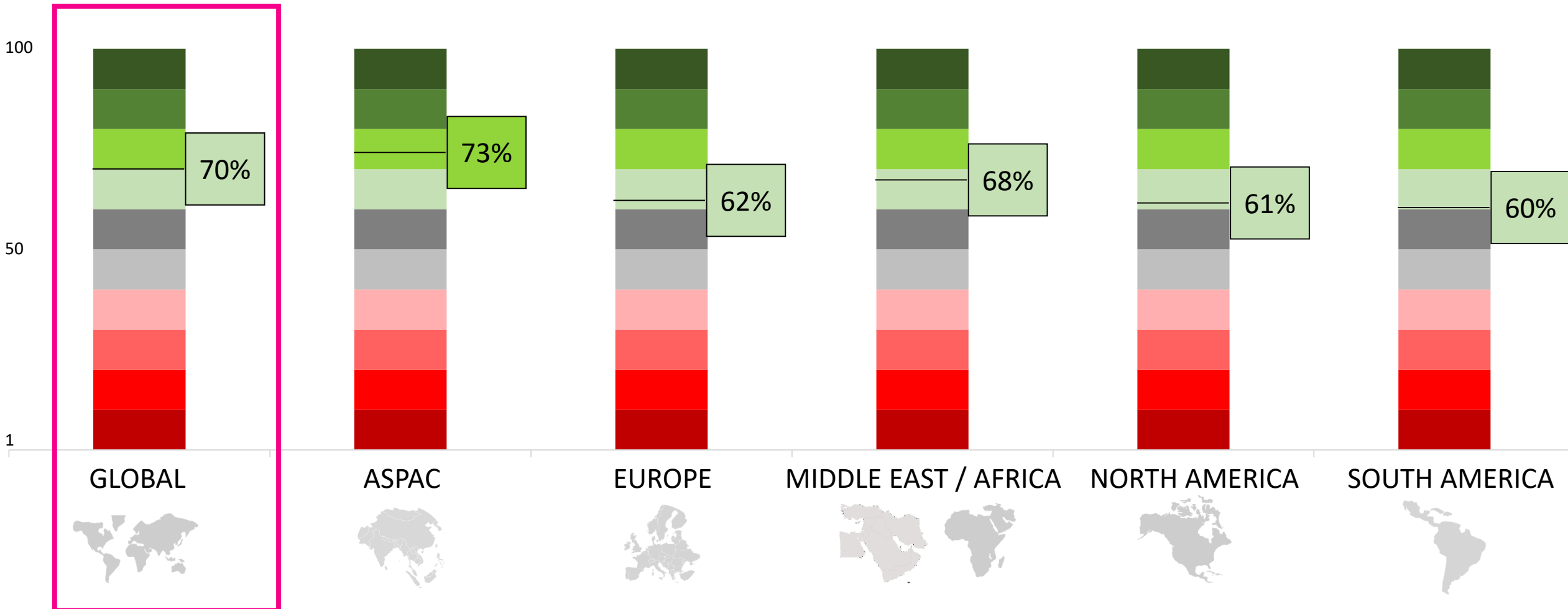
in partnership with





CUSTOMER SATISFACTION INDEX

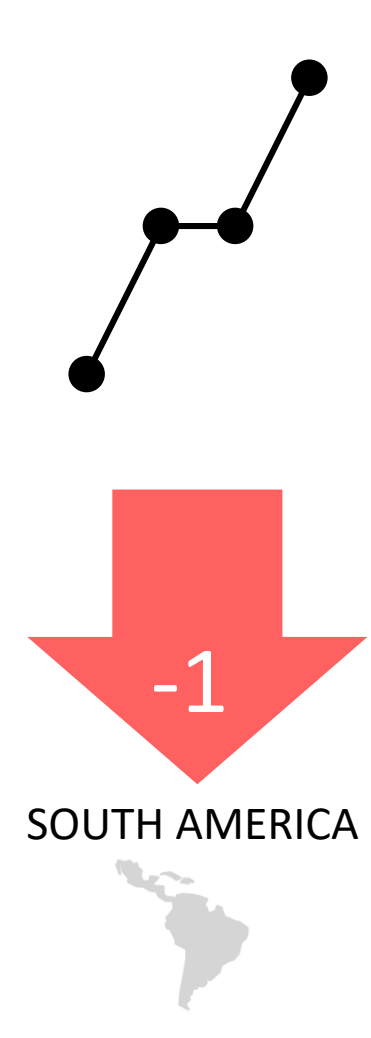
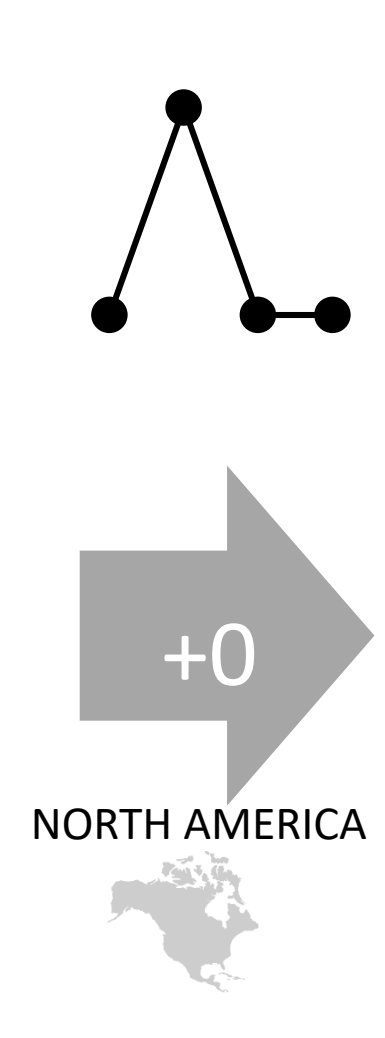
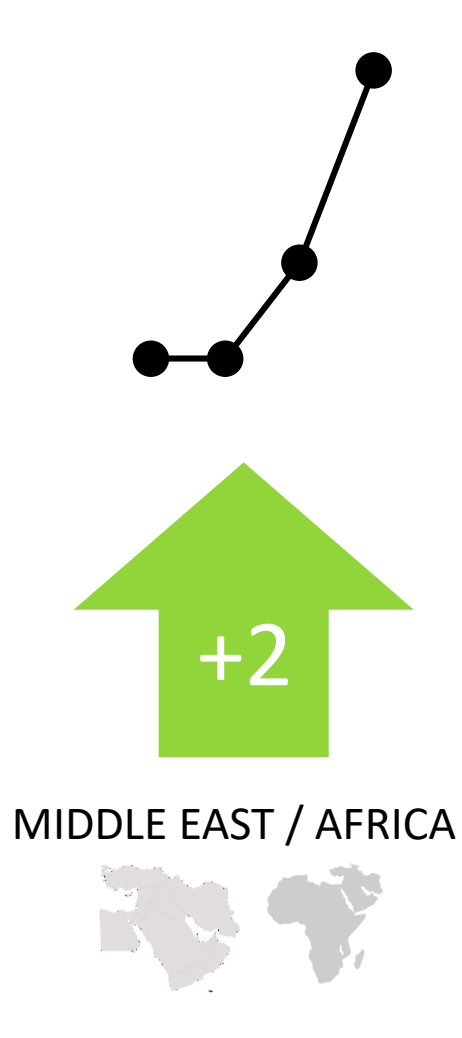
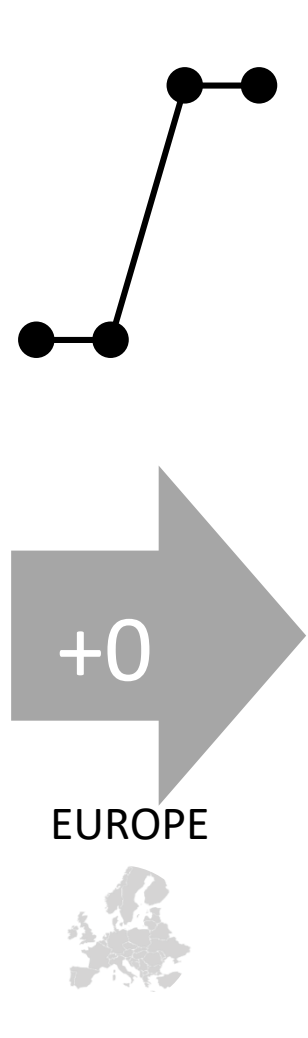
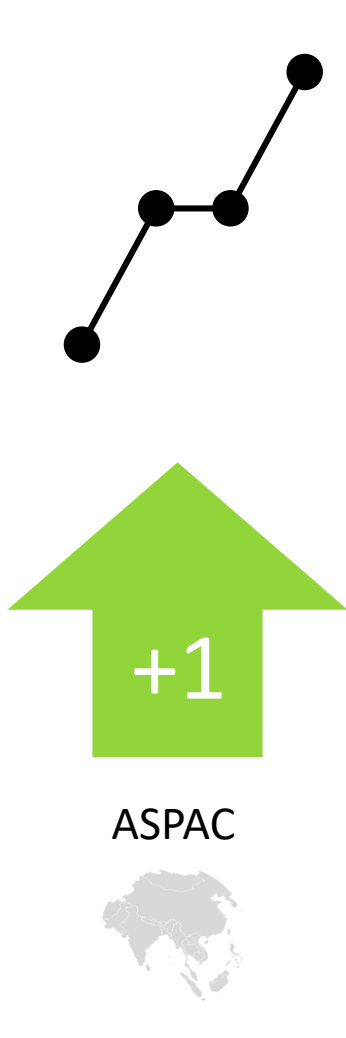
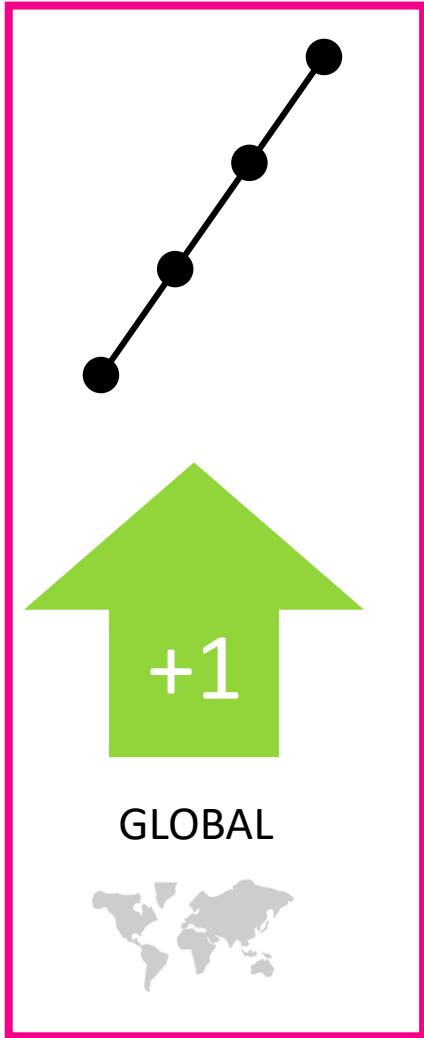
Computed by aggregating the satisfaction scores on all aspects of the DF visit, and weighting these in function of their impact on the overall satisfaction

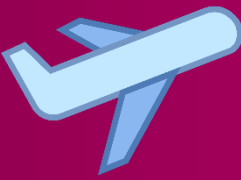




EVOLUTION

(vs Q2 2019 and trend over last 4 quarters)





AIR TRAFFIC

(Total international PAX in Q3 2019 and % of growth Y-O-Y (vs Q3 2018))

979 M

247 M

500 M

105 M

76 M

51 M

+ 3.7%

+5.0%

+3.9%

+2.7%

+2.3%

+ 0.7%

GLOBAL

ASPAC

EUROPE

MIDDLE EAST /
AFRICA

NORTH AMERICA

SOUTH AMERICA





PERCEPTION OF DF SHOPPING

(Q3 2019 & trends over last 4 quarters)

% of travelers who agree

GLOBAL

TREND

Variety of products makes DF a great place for shopping



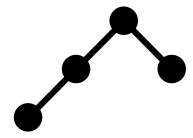
46%



Part of the travel experience



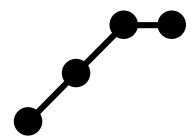
46%



Great place to try new brands



44%



More motivated to buy "DF exclusives"



42%



% of travelers who agree

GLOBAL

TREND

Great place to Buy gifts



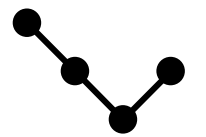
39%



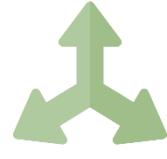
Prices are usually cheaper



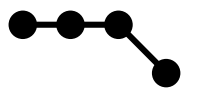
35%



Truly different experience



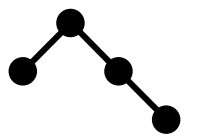
30%



Exclusive and unique products



29%



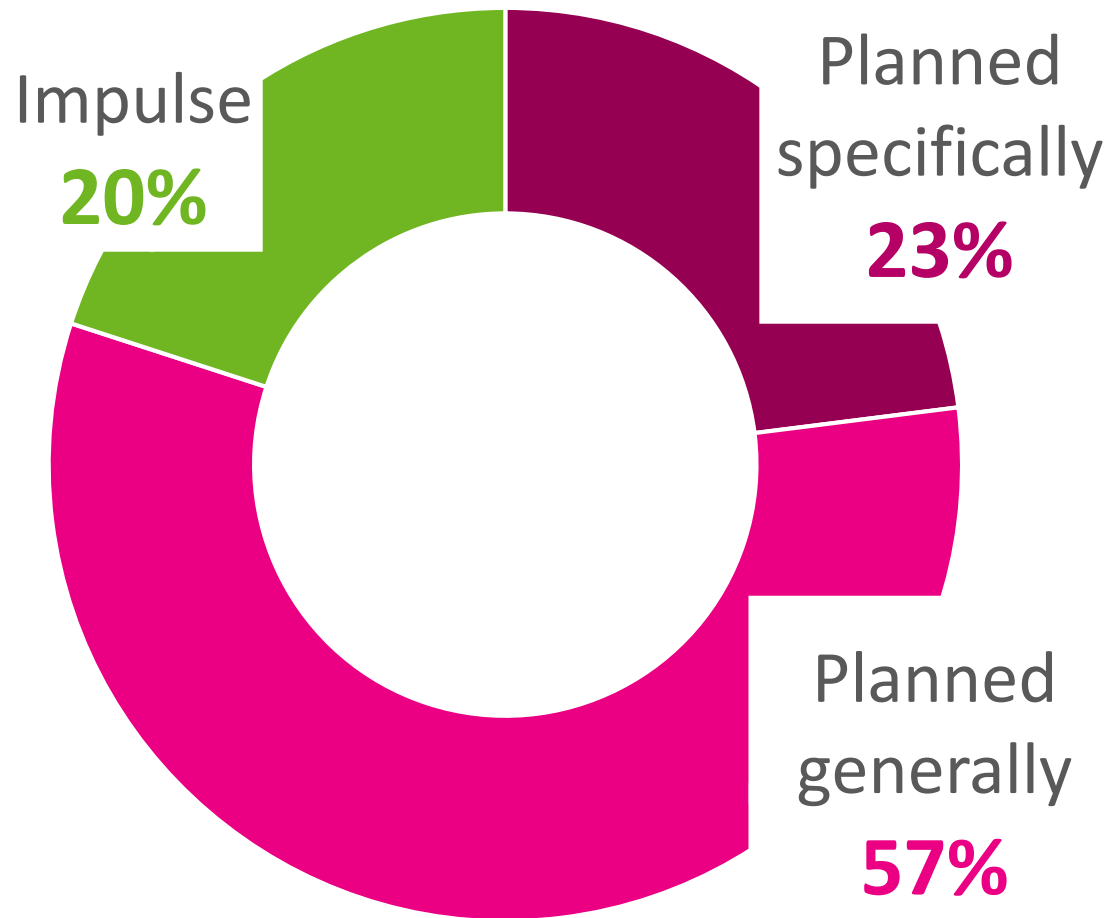


DESTINATION OF DF PURCHASE





PLANNING LEVEL OF PURCHASE



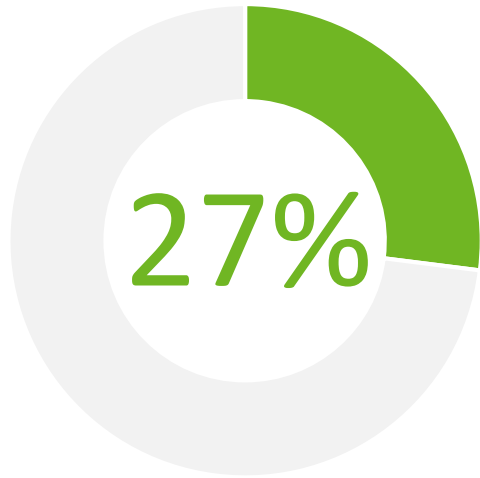
- Planned to buy a **specific product**
- Planned to buy a **specific brand**

80%
of TR buyers plan
their purchase

- Planned **without** any specific **idea**
- Planned with **some ideas** in mind
- Planned with **budget in mind**

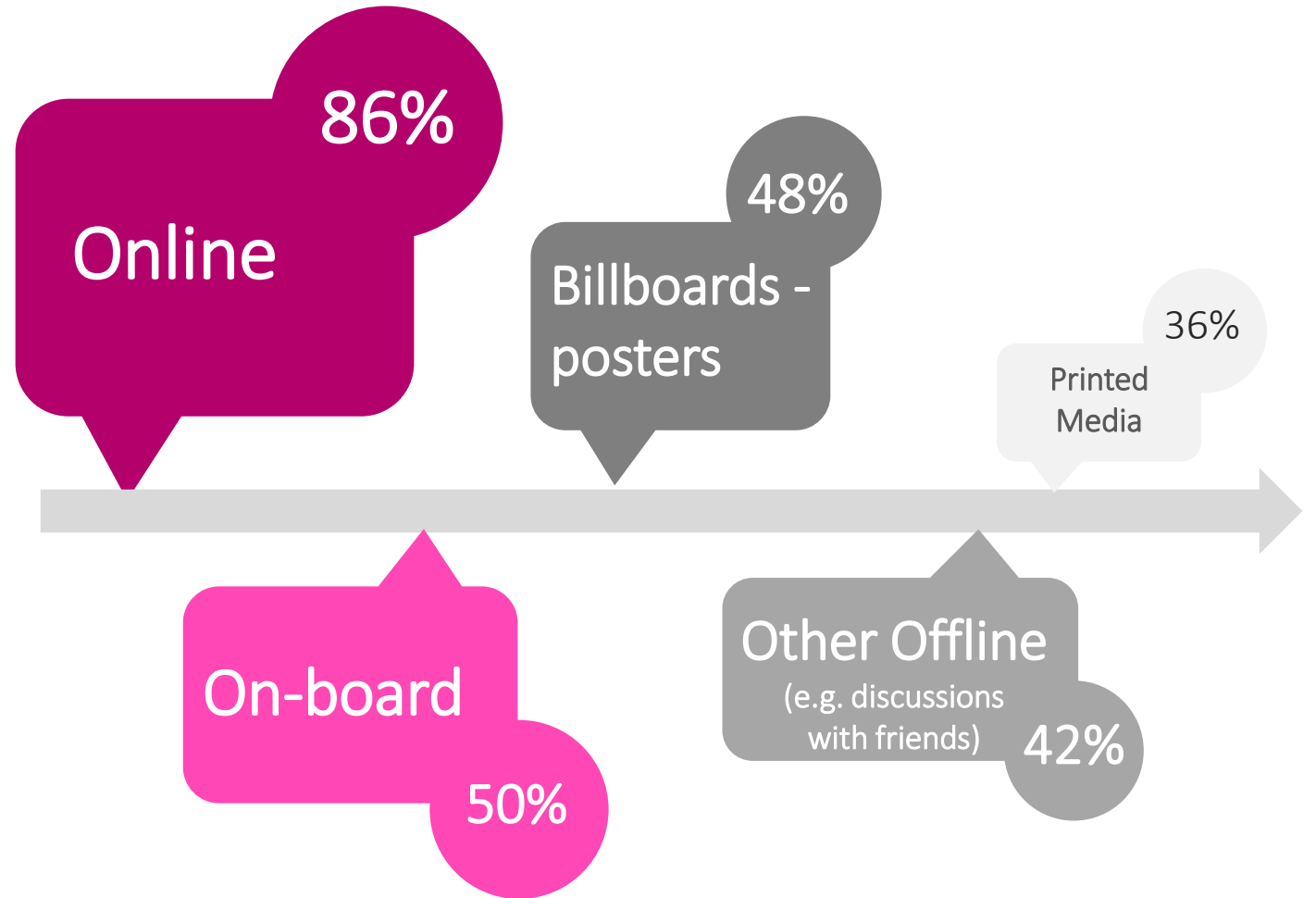


EXPOSURE TO TOUCH POINTS



Of Duty-Free Shoppers **notice touch points** before arriving at the DF shop

TOP GROUPED TOUCH POINTS BEFORE THE TRIP



SAMPLE

Over N=4005
online interviews
with travelers



COVERAGE

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



TIMELINE

Fieldwork in
September 2019



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