



# DFWC QUARTERLY GLOBAL SHOPPING MONITOR



Q3 2022



in partnership with



# TOTAL INTERNATIONAL PAX DEPARTURES

June-Aug 2022 & % of June-Aug 2019

GLOBAL



380 M

70%

of same  
period in 2019

ASPAC



42 M

31%

of same  
period in 2019

EUROPE



224 M

83%

of same  
period in 2019

MIDDLE EAST /  
AFRICA



53 M

84%

of same  
period in 2019

NORTH AMERICA



37 M

80%

of same  
period in 2019

SOUTH AMERICA



25 M

85%

of same  
period in 2019











## TOP 10 AIRPORTS

June-Aug 2022

DXB - Dubai, AE	9.09 M
LHR - London-Heathrow, EN, GB	8.48 M
AMS - Amsterdam, NL	8.02 M
CDG - Paris-De Gaulle, FR	7.90 M
FRA - Frankfurt, DE	7.20 M
IST - Istanbul, TR	6.45 M
LGW - London-Gatwick, EN, GB	5.36 M
MAD - Madrid, ES	5.15 M
DOH - Doha, QA	5.09 M
SIN - Singapore, SG	4.57 M

## TOP 10 NATIONALITIES

June-Aug 2022

	United States	41.95 M
	United Kingdom	40.82 M
	Germany	26.47 M
	France	19.62 M
	Spain	17.15 M
	Italy	16.16 M
	Canada	9.36 M
	India	7.74 M
	Saudi Arabia	7.56 M
	Switzerland	7.49 M

## DRIVERS TO PURCHASE



Good value for money

**18%**  
(vs 32% in Q3 2019)



Price advantage

**17%**  
(vs 30% in Q3 2019)



Convenience

**16%**  
(vs 26% in Q3 2019)



Special / DF exclusive edition

**15%**  
(vs 12% in Q3 2019)



Enough time to choose

**15%**  
(vs 20% in Q3 2019)



Loyalty to brand

**15%**  
(vs 18% in Q3 2019)

## BARRIERS TO PURCHASE



Long queue to pay

**20%**  
(vs 5% in Q3 2019)



Not enough time to choose

**19%**  
(vs 11% in Q3 2019)



Unsure about custom regulations

**18%**  
(vs 8% in Q3 2019)



Higher prices vs other airports

**17%**  
(vs 12% in Q3 2019)



Higher prices vs home

**17%**  
(vs 31% in Q3 2019)

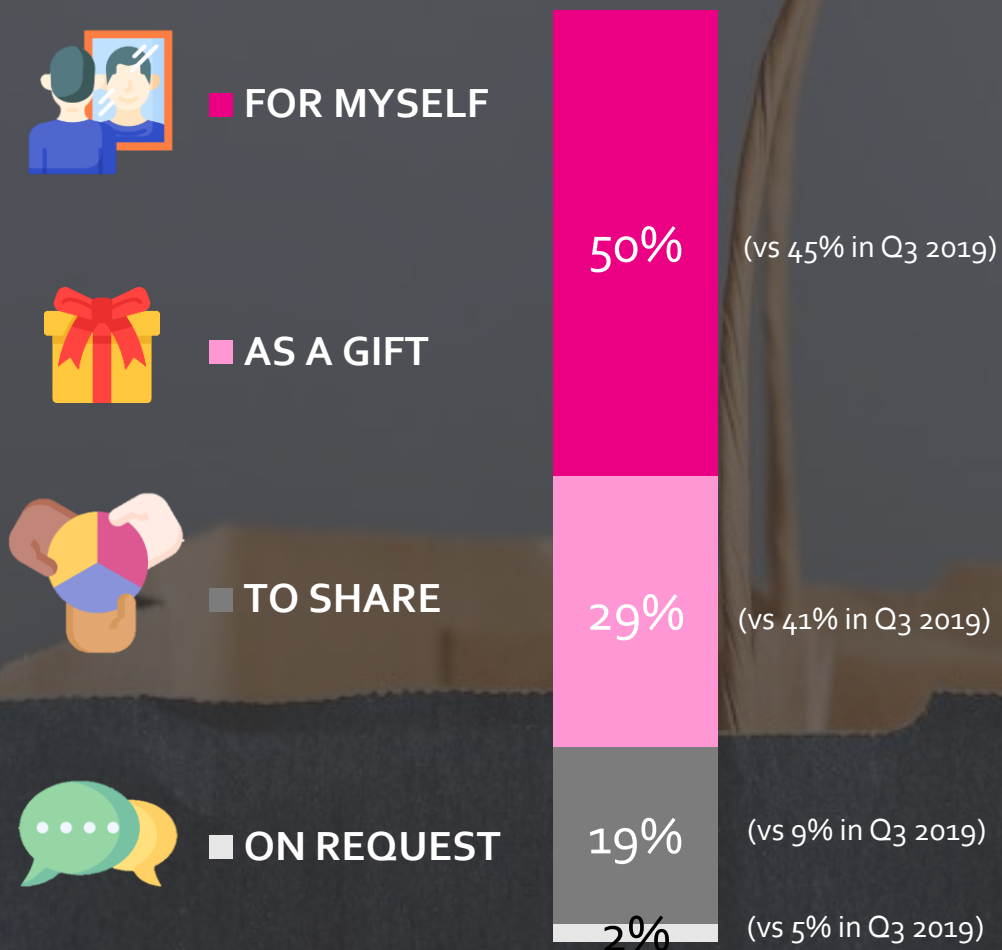


Don't feel safe inside the shop

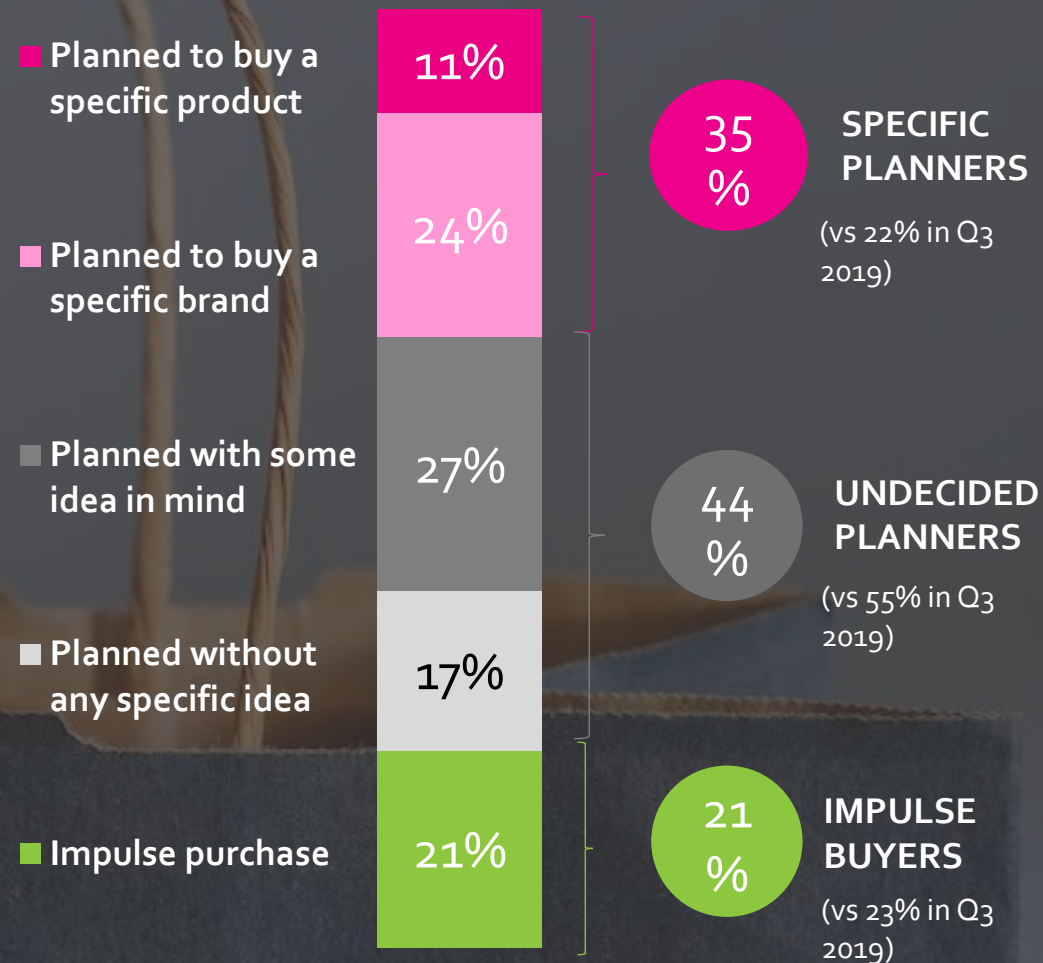
**14%**  
(n.a. in Q3 2019)



## PURPOSE OF PURCHASE



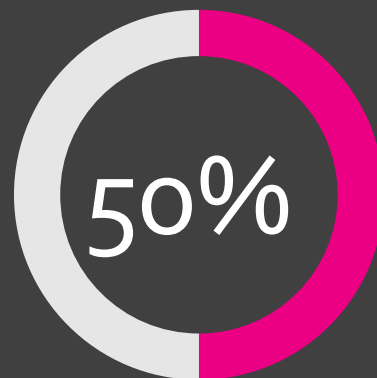
## PLANNING OF PURCHASE



## TOP TOUCH POINTS:

% out of those who notice touch points

**% OF DF SHOPPERS  
EXPOSED TO PRE-SHOPPING  
INFORMATION:**



(vs 22% in Q3 2019)



Saw ads on billboards  
outside the airport

**27%**  
(32% in Q3  
2019)



Asked / discussed  
with friends

**25%**  
(38% in Q3  
2019)



Searched info on DF  
retailer website

**22%**  
(vs 28% in  
Q3 2019)



Searched info in  
DF sales catalogue

**21%**  
(vs 15% in  
Q3 2019)



Searched info in  
In-flight magazine

**21%**  
(vs 30% in  
Q3 2019)



Saw ads in magazine /  
publications

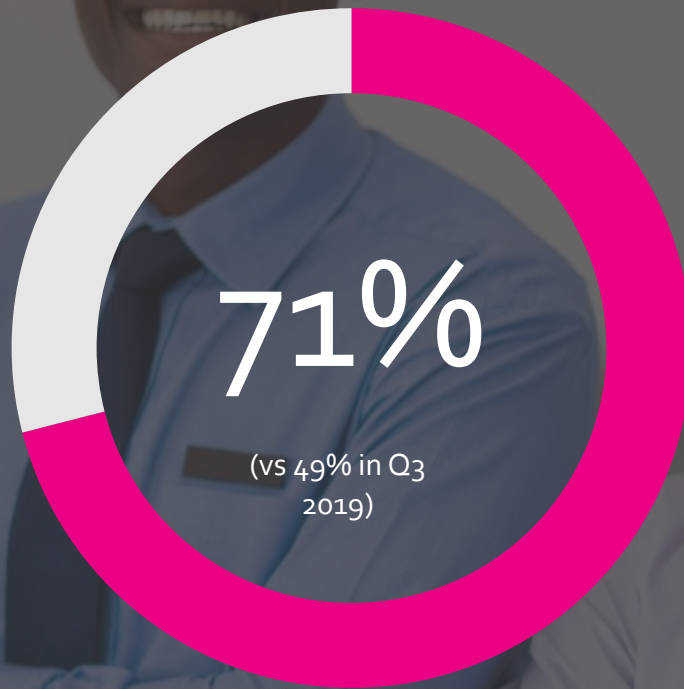
**20%**  
(23% in Q3  
2019)



Saw ads / billboards  
offline in home city

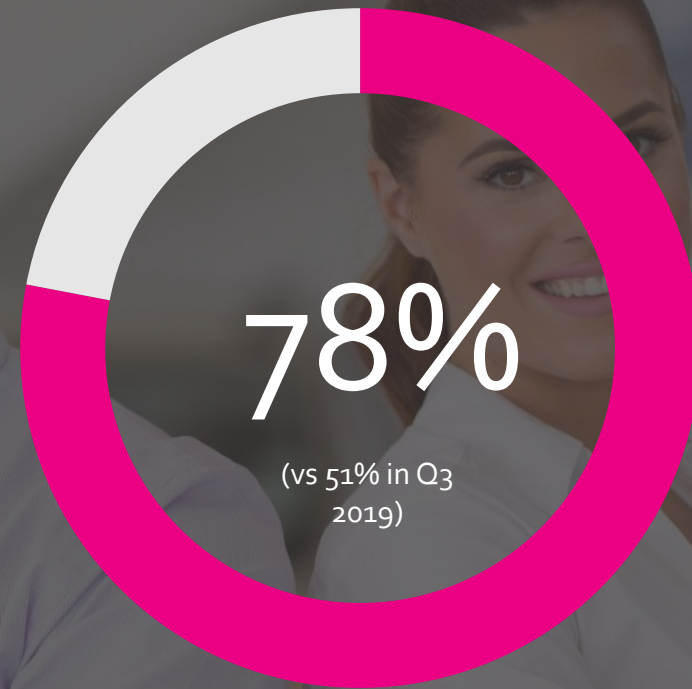
**18%**  
(vs 8% in Q3  
2019)

## STAFF INTERACTION



of shoppers **interacted with the sales staff** during their last visit to the **Duty Free**

## STAFF INFLUENCE



of shoppers who interacted with the sales staff were **positively influenced by their advice**