DFWC QUARTERLY GLOBAL SHOPPING MONITOR

Q4 2022

DFWC
DUTY FREE WORLD COUNCIL
Serving duty free and travel retail worldwide

in partnership with

m1ndset
RESEARCH BEYOND BORDERS

TOTAL INTERNATIONAL PAX DEPARTURES

Sept-Nov 2022 & % of Sept-Nov 2019

GLOBAL	ASPAC	EUROPE	MIDDLE EAST / AFRICA	NORTH AMERICA	SOUTH AMERICA
350 M	50 M	191 M	51 M	32 M	25 M
76%	40%	87%	95%	86%	97%
of same period in 2019	of same period in 2019	of same period in 2019	of same period in 2019	of same period in 2019	of same period in 2019

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TOP 10 AIRPORTS
Sept-Nov 2022
International Departures

DXB - Dubai, AE	9.61 M
LHR - London-Heathrow, EN, GB	7.91 M
AMS - Amsterdam, NL	7.47 M
CDG - Paris-De Gaulle, FR	7.20 M
FRA - Frankfurt, DE	6.60 M
IST - Istanbul, TR	6.45 M
SIN - Singapore, SG	5.32 M
MAD - Madrid, ES	5.19 M
DOH - Doha, QA	4.71 M
LGW – London-Gatwick, EN, GB	4.17 M

TOP 10 NATIONALITIES
Sept-Nov 2022
International Departures

United Kingdom	34.00 M
United States	33.86 M
Germany	22.95 M
France	16.33 M
Spain	15.70 M
Italy	13.27 M
Canada	9.80 M
India	8.65 M
Switzerland	6.74 M
Netherlands	6.33 M

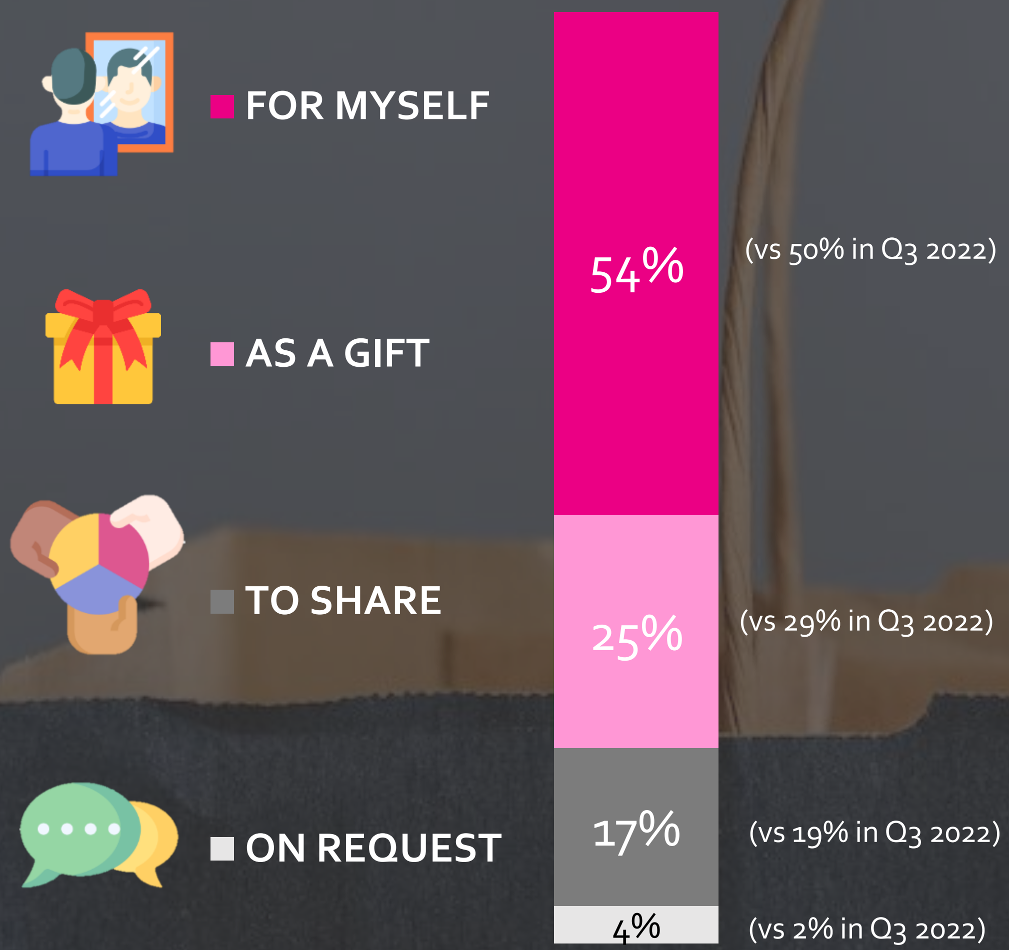
DRIVERS TO PURCHASE

Convenience	35% (vs 16% in Q3 2022)
Loyalty to brand	23% (vs 15% in Q3 2022)
Good value for money	22% (vs 18% in Q3 2022)
Suitable as self-treat	18% (vs 9% in Q3 2022)
Price advantage vs local market / online	16% (vs 17% in Q3 2022)
Enough time to choose	15% (vs 15% in Q3 2022)

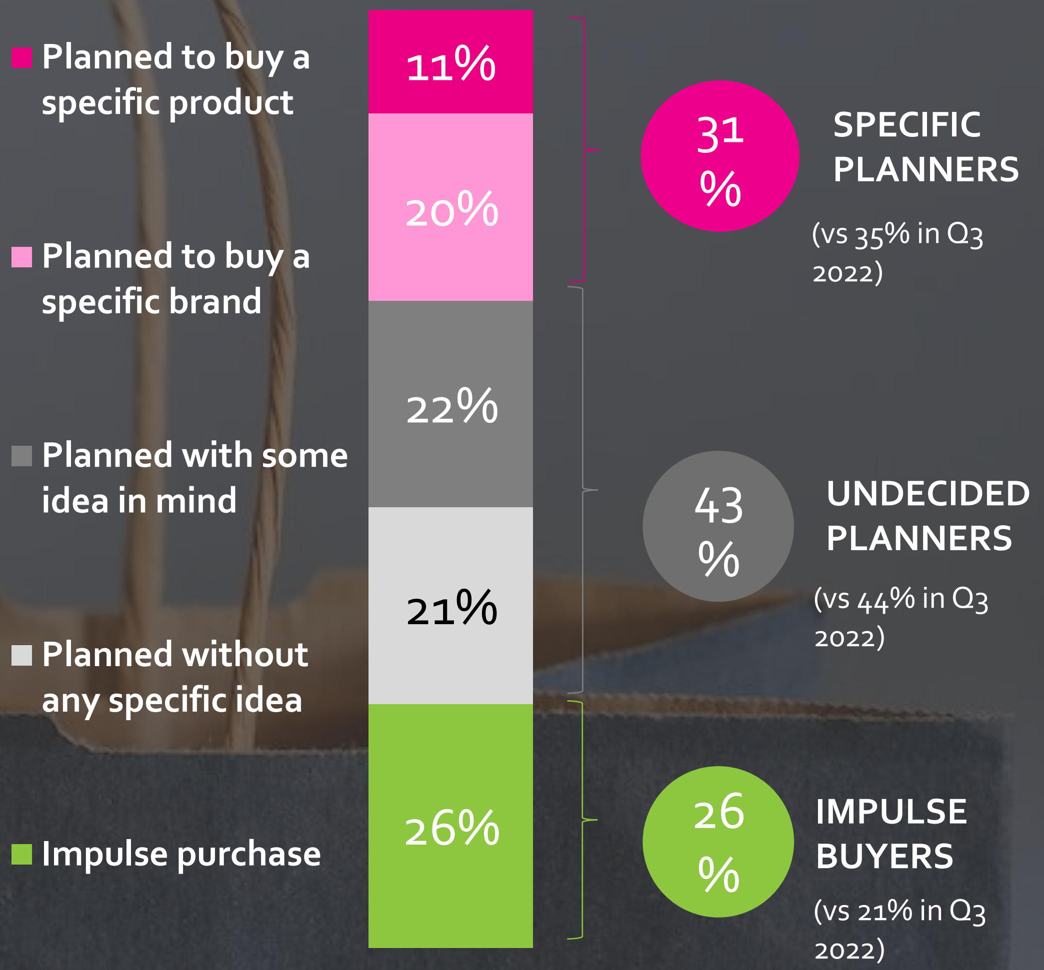
BARRIERS TO PURCHASE

Higher prices vs home	19% (vs 17% in Q3 2022)
Lack of motivating promotions	16% (vs 12% in Q3 2022)
Unwilling to carry more items	16% (vs 12% in Q3 2022)
Long queue to pay	15% (vs 20% in Q3 2022)
Higher prices vs other airports	15% (vs 17% in Q3 2022)
Unsure about custom regulations	15% (vs 18% in Q3 2022)

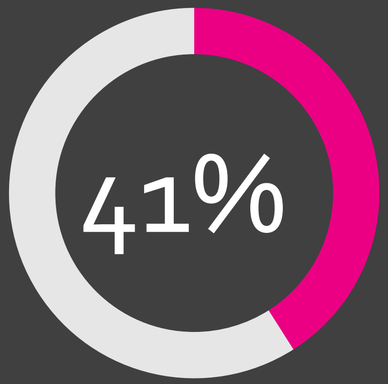
PURPOSE OF PURCHASE



PLANNING OF PURCHASE



% OF DF SHOPPERS EXPOSED TO PRE-SHOPPING INFORMATION:



(vs 50% in Q3 2022)

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TOP TOUCH POINTS:

% out of those who notice touch points

Asked / discussed with friends	22% (vs 25% in Q3 2022)
Searched info on DF retailer website	20% (vs 22% in Q3 2022)
Read magazine / publications	20% (vs 17% in Q3 2022)
Searched info in DF sales catalogue	20% (vs 21% in Q3 2022)
Saw ads on billboards outside the airport	20% (vs 27% in Q3 2022)
Saw ads in magazine / publications	19% (21% in Q3 2022)
Brands' official websites	18% (vs 4% in Q3 2022)

STAFF INTERACTION

54%

(vs 71% in Q3 2022)

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

STAFF INFLUENCE

72%

(vs 78% in Q3 2022)

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