DFWC QUARTERLY GLOBAL SHOPPING MONITOR

Q1 2024

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

in partnership with

m1nd set
RESEARCH BEYOND BORDERS

TOTAL INTERNATIONAL PAX DEPARTURES

November 2023 - January 2024 & % of November 2018 – January 2019

GLOBAL	ASPAC	EUROPE	MIDDLE EAST / AFRICA	NORTH AMERICA	SOUTH AMERICA
452 M	111 M	191 M	66 M	51 M	33 M
108%	87%	113%	125%	128%	110%
of same period in 2018-2019	of same period in 2018-2019	of same period in 2018-2019	of same period in 2018-2019	of same period in 2018-2019	of same period in 2018-2019

TOP 10 AIRPORTS
November 2023 - January 2024
International Departures

DXB - Dubai, AE	12.18 M
LHR - London-Heathrow, EN, GB	10.25 M
SIN - Singapore, SG	9.37 M
ICN - Seoul, KR	8.81 M
CDG - Paris-De Gaulle, FR	8.28 M
AMS - Amsterdam, NL	8.39 M
HKG – Hong Kong, HK	7.08 M
FRA - Frankfurt, DE	6.78 M
IST - Istanbul, TR	6.66 M
DOH – Doha, QA	6.47 M

TOP 10 NATIONALITIES
November 2023 - January 2024
International Departures

United States	44.02 M
United Kingdom	30.51 M
Germany	22.78 M
France	19.49 M
India	18.66 M
Italy	16.67 M
Spain	15.92 M
South Korea	14.21 M
China	13.30 M
Canada	11.36 M

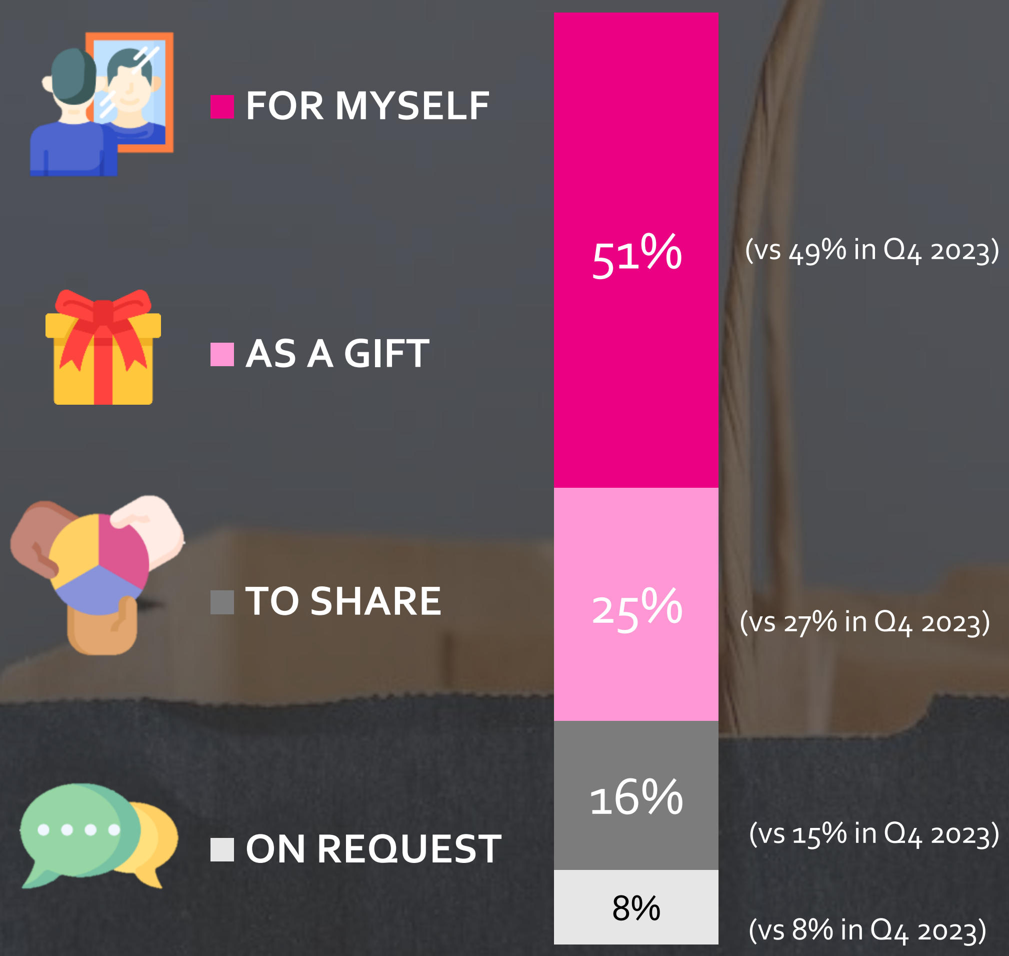
DRIVERS TO PURCHASE

Good value for money	26% (vs 25% in Q4 2023)
Convenience	19% (vs 21% in Q4 2023)
Enough time to choose	17% (vs 18% in Q4 2023)
Loyalty to Brand	16% (vs 17% in Q4 2023)
Suitable as a self-treat	16% (vs 15% in Q4 2023)
To indulge myself	15% (vs 15% in Q4 2023)

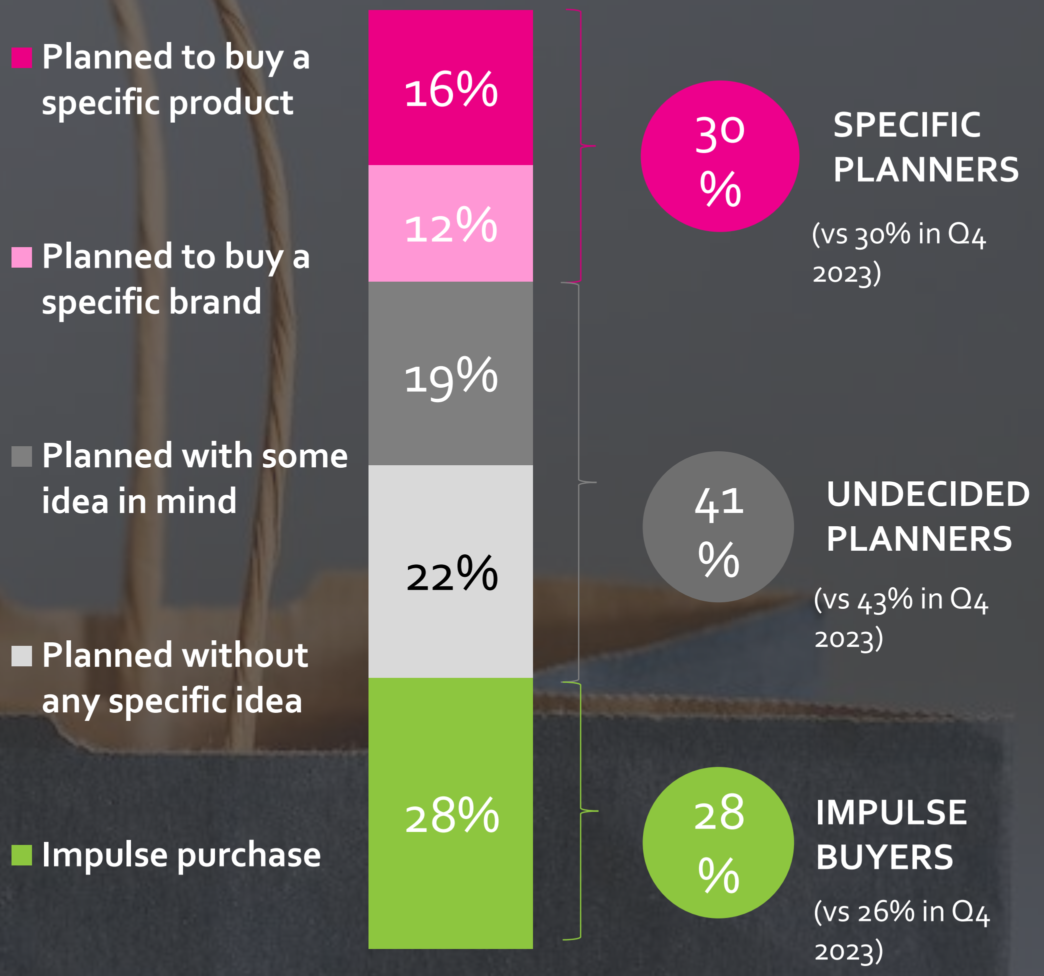
BARRIERS TO PURCHASE

Lack of motivating promotions	20% (vs 19% in Q4 2023)
No intention of buying anything	18% (vs 19% in Q4 2023)
Higher Prices than home	16% (vs 17% in Q4 2023)
Higher Prices than destination	13% (vs 14% in Q4 2023)
Unwilling to carry more items	13% (vs 16% in Q4 2023)
Not attracted by any product	12% (vs 12% in Q4 2023)

PURPOSE OF PURCHASE

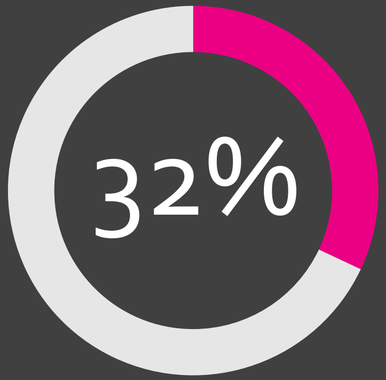


PLANNING OF PURCHASE



Q1 2024

% OF DF SHOPPERS EXPOSED TO PRE-SHOPPING INFORMATION:



(vs 29% in Q4 2023)

TOP TOUCH POINTS:

% out of those who notice touch points

Did a general internet search	17% (vs 16% in Q4 2023)
Searched info on shopping sites	13% (vs 13% in Q4 2023)
Searched content on social media	13% (vs 11% in Q4 2023
Searched info on the DF retailer website	12% (vs 11% in Q4 2023)
Searched info on travel apps/ websites	12% (vs 11% in Q4 2023)
Saw a promotion at the airport	11% (vs 10% in Q4 2023)
Brands' official websites	10% (vs 10% in Q4 2023)

STAFF INTERACTION

50%

(vs 47% in Q4 2023)

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

STAFF INFLUENCE

73%

(vs 69% in Q4 2023)

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