

DFWC QUARTERLY GLOBAL SHOPPING MONITOR

Q4 2024



in partnership
with



TOTAL INTERNATIONAL PAX DEPARTURES

October – December 2024 & % of October – December 2019

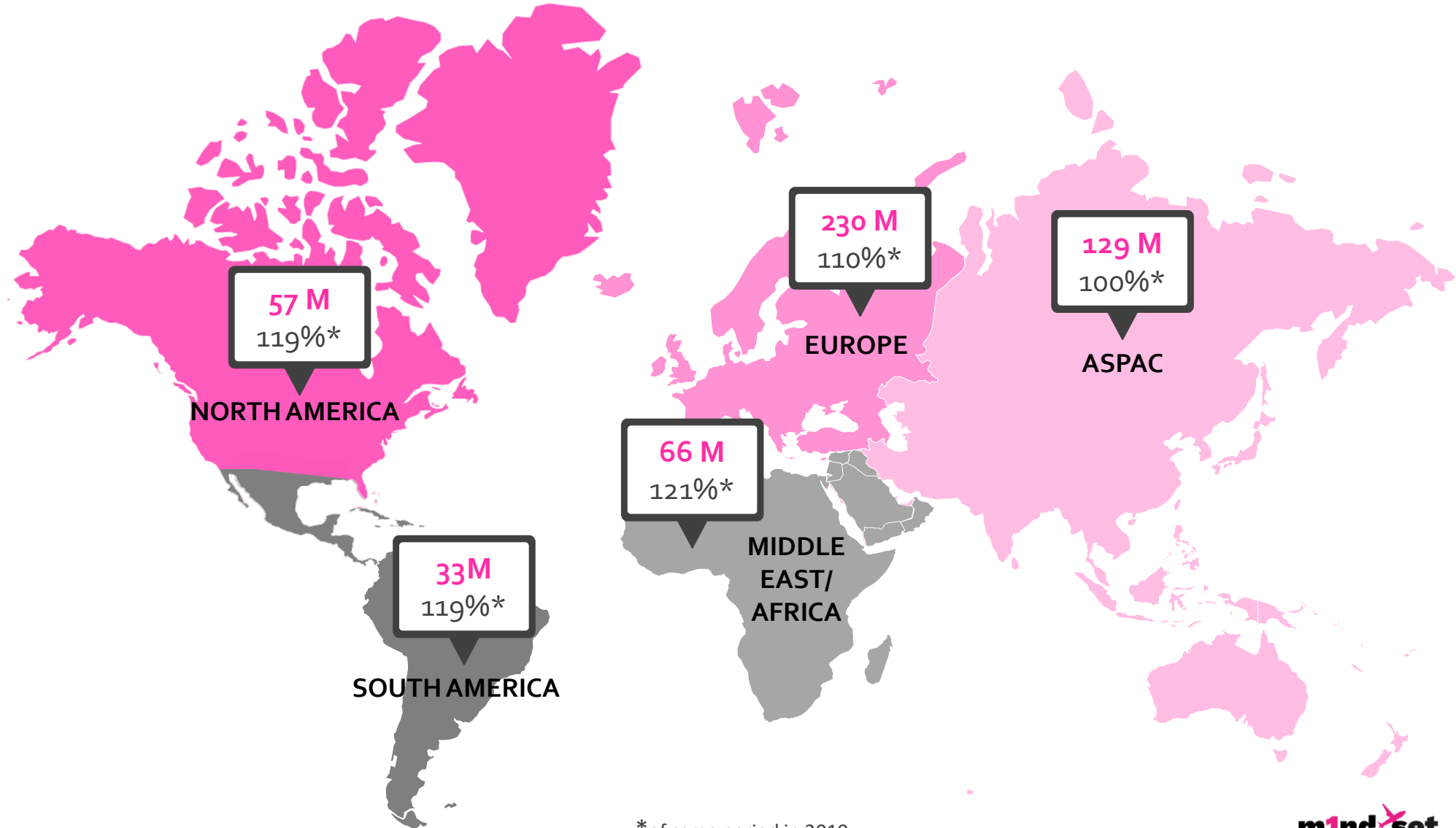
GLOBAL



515 M

110%

of same period in 2019



*of same period in 2019











TOP 10 AIRPORTS

October – December 2024
International Departures

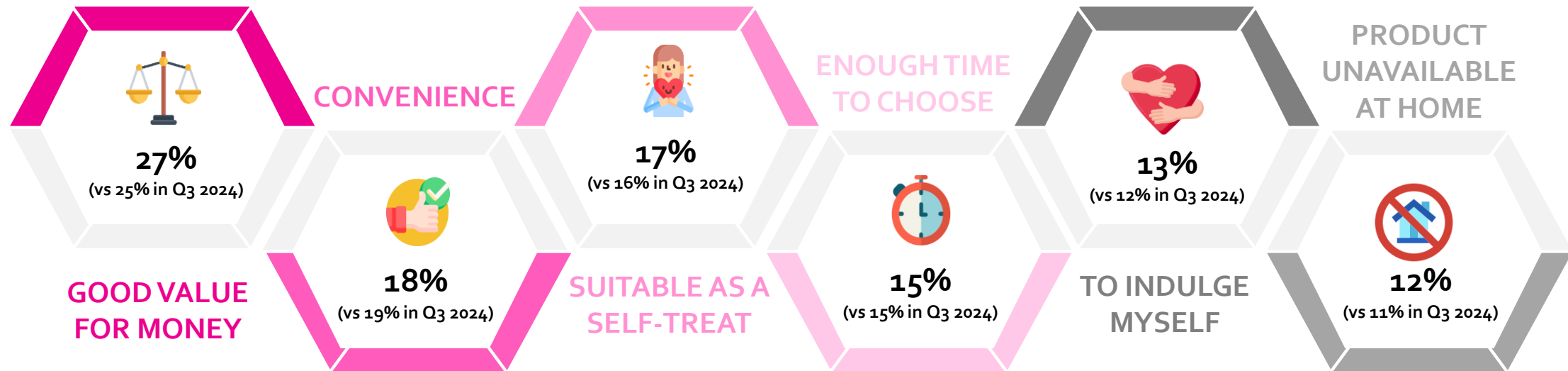
DXB - Dubai, AE	12.3 M
LHR - London, GB	12.1 M
SIN - Singapore, SG	10.4 M
ICN - Seoul, KR	10.0 M
AMS - Amsterdam, NL	9.4 M
CDG - Paris-De Gaulle, FR	9.3 M
FRA - Frankfurt, DE	8.1 M
HKG - Hong Kong, HK	8.0 M
IST - Istanbul, TR	7.4 M
BKK – Bangkok, TH	6.6 M

TOP 10 NATIONALITIES

October – December 2024
International Departures

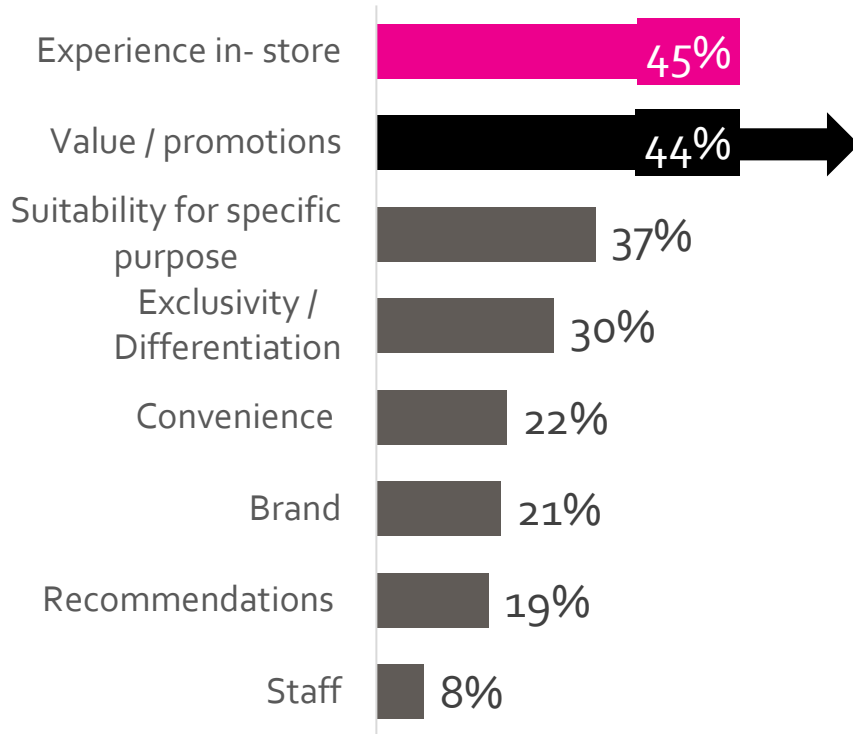
	United States	49.7 M
	United Kingdom	37.5 M
	Germany	29.2 M
	France	21.4 M
	India	20.9 M
	China	19.5 M
	Spain	19.2 M
	Italy	18.0 M
	South Korea	14.5 M
	Turkey	12.8 M

DRIVERS TO PURCHASE Q4 2024

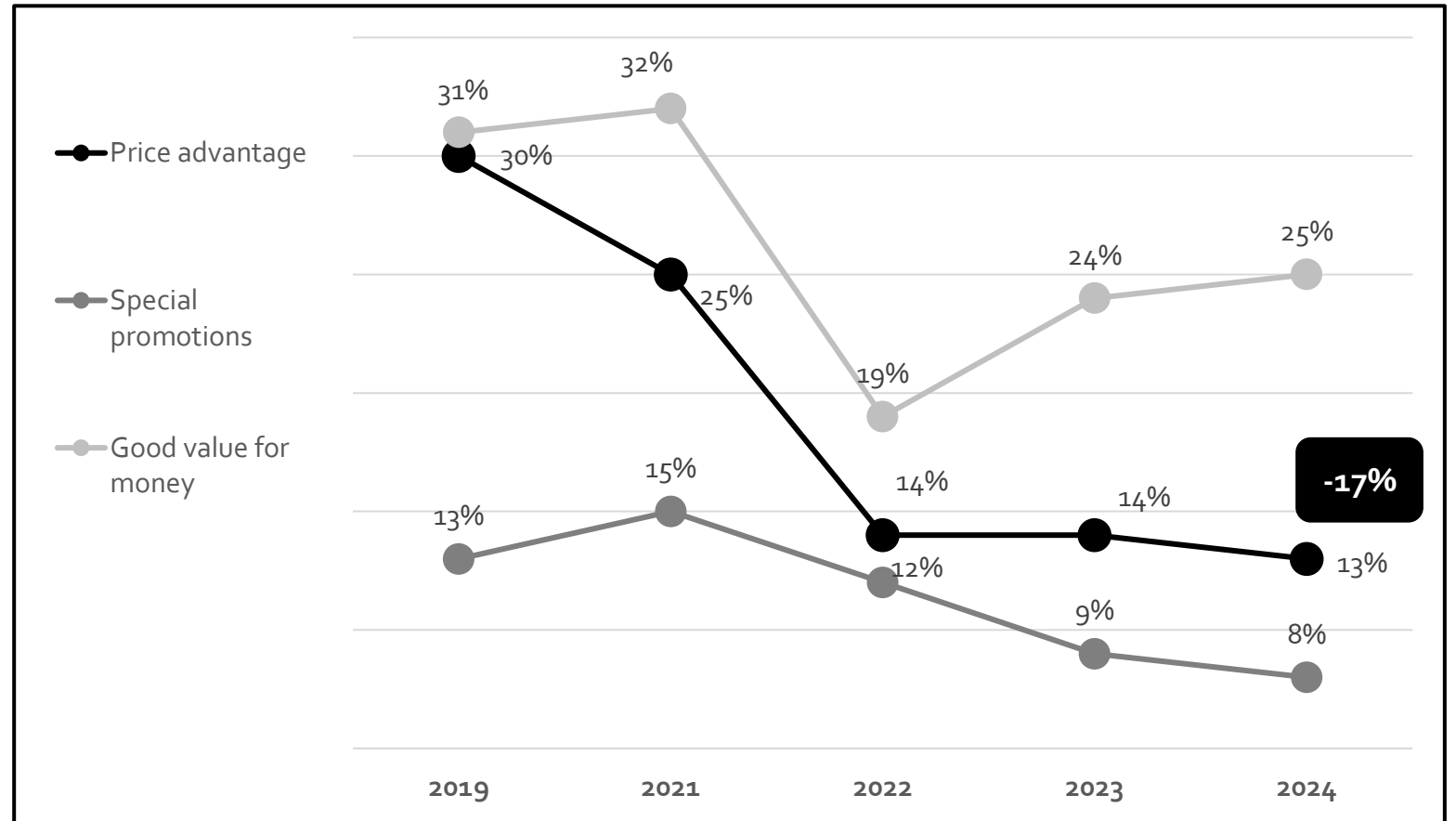


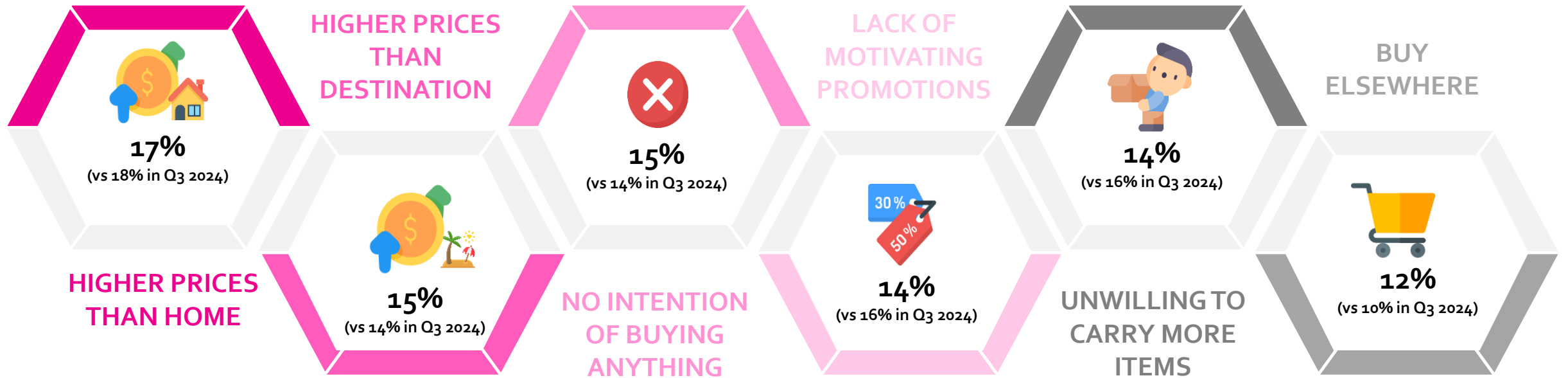
AS PRICE ADVANTAGE LOSES IMPORTANCE, EXPERIENCE IN-STORE BECOMES #1 DRIVER TO PURCHASE

NET DRIVERS

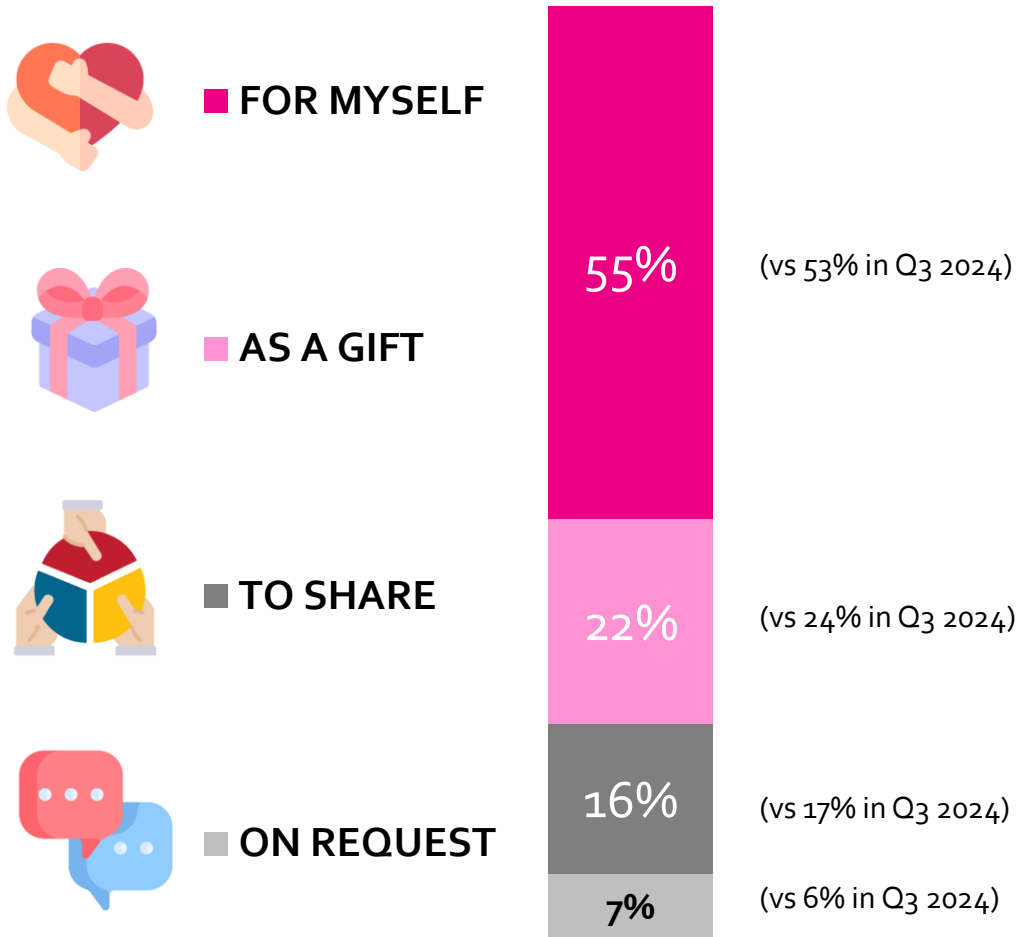


INDIVIDUAL VALUE DRIVERS

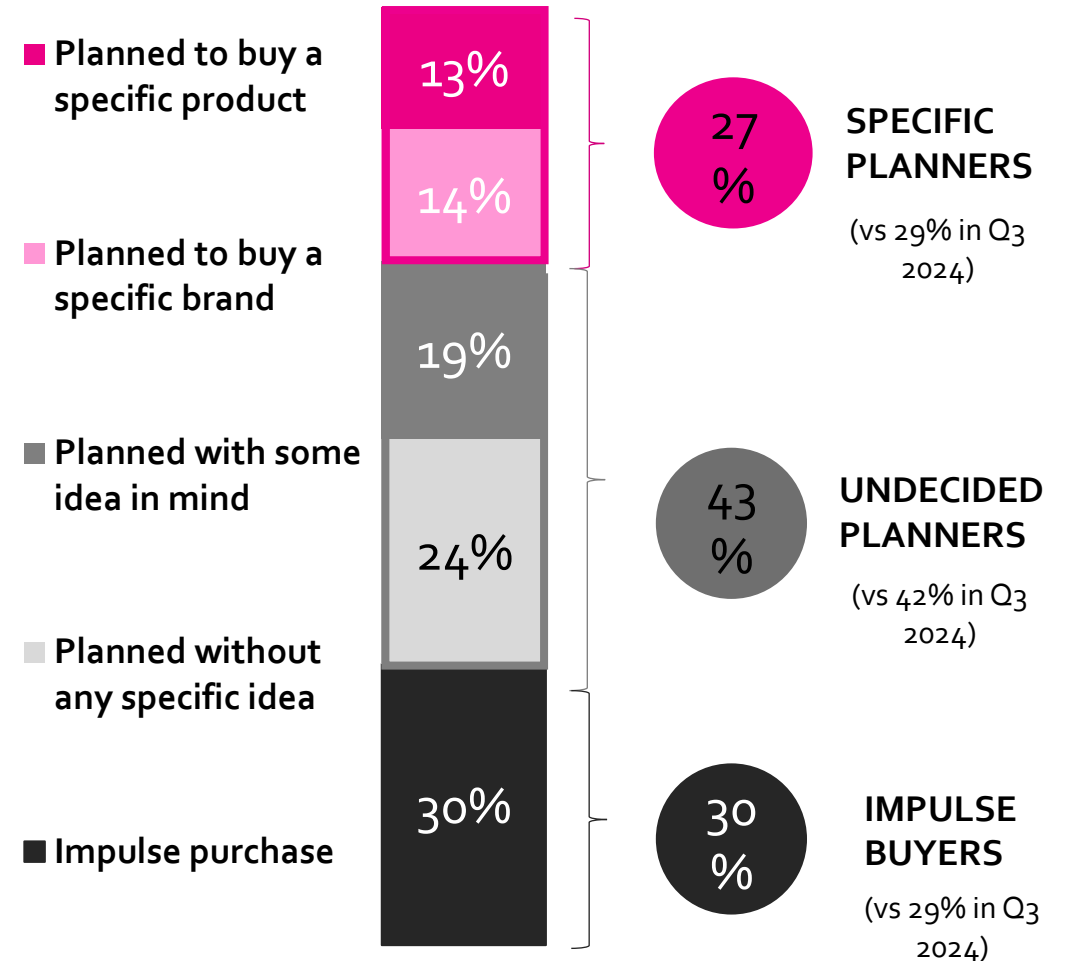




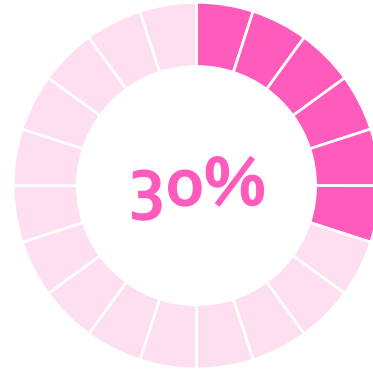
PURPOSE OF PURCHASE Q4 2024



Q4 2024 PLANNING LEVELS



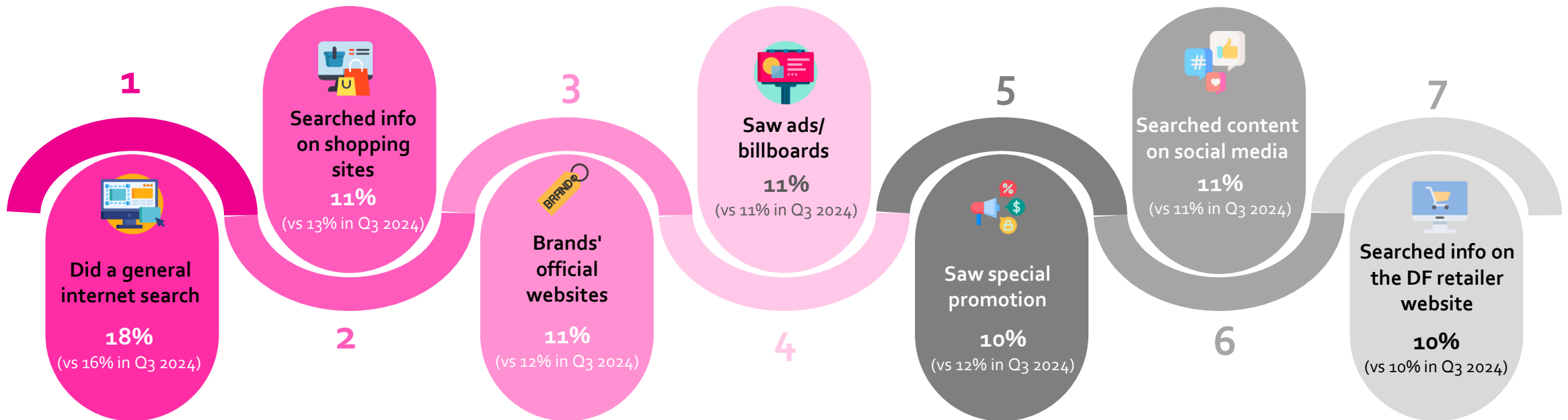
% OF DF SHOPPERS EXPOSED TO PRE-SHOPPING INFORMATION:



(vs 34% in Q3 2024)

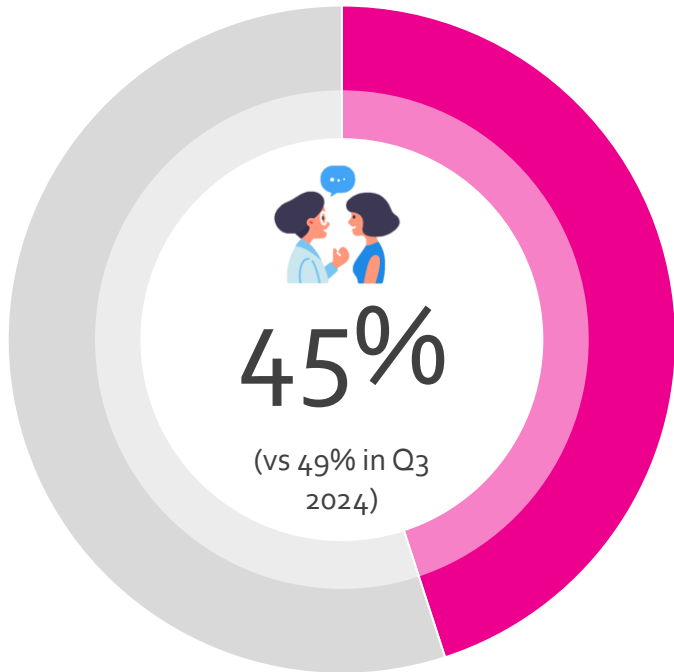
TOP TOUCH POINTS

(% out of those who notice touch points)



STAFF INTERACTION

Q4 2024

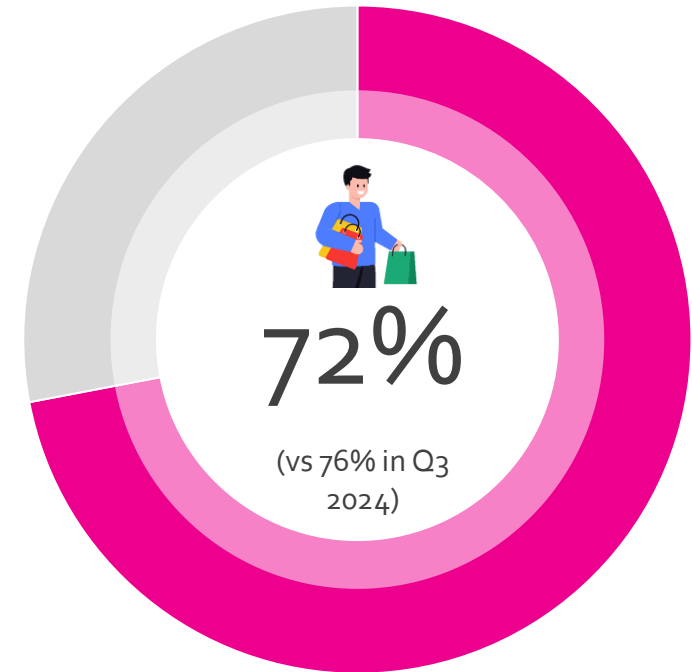


of shoppers **interacted with the sales staff** during their last visit to the **Duty Free**



Q4 2024

STAFF INFLUENCE



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