

DFWC QUARTERLY GLOBAL SHOPPING MONITOR

Q1 2025



in partnership
with



TOTAL INTERNATIONAL PAX DEPARTURES

January – March 2025 & % of January – March 2019

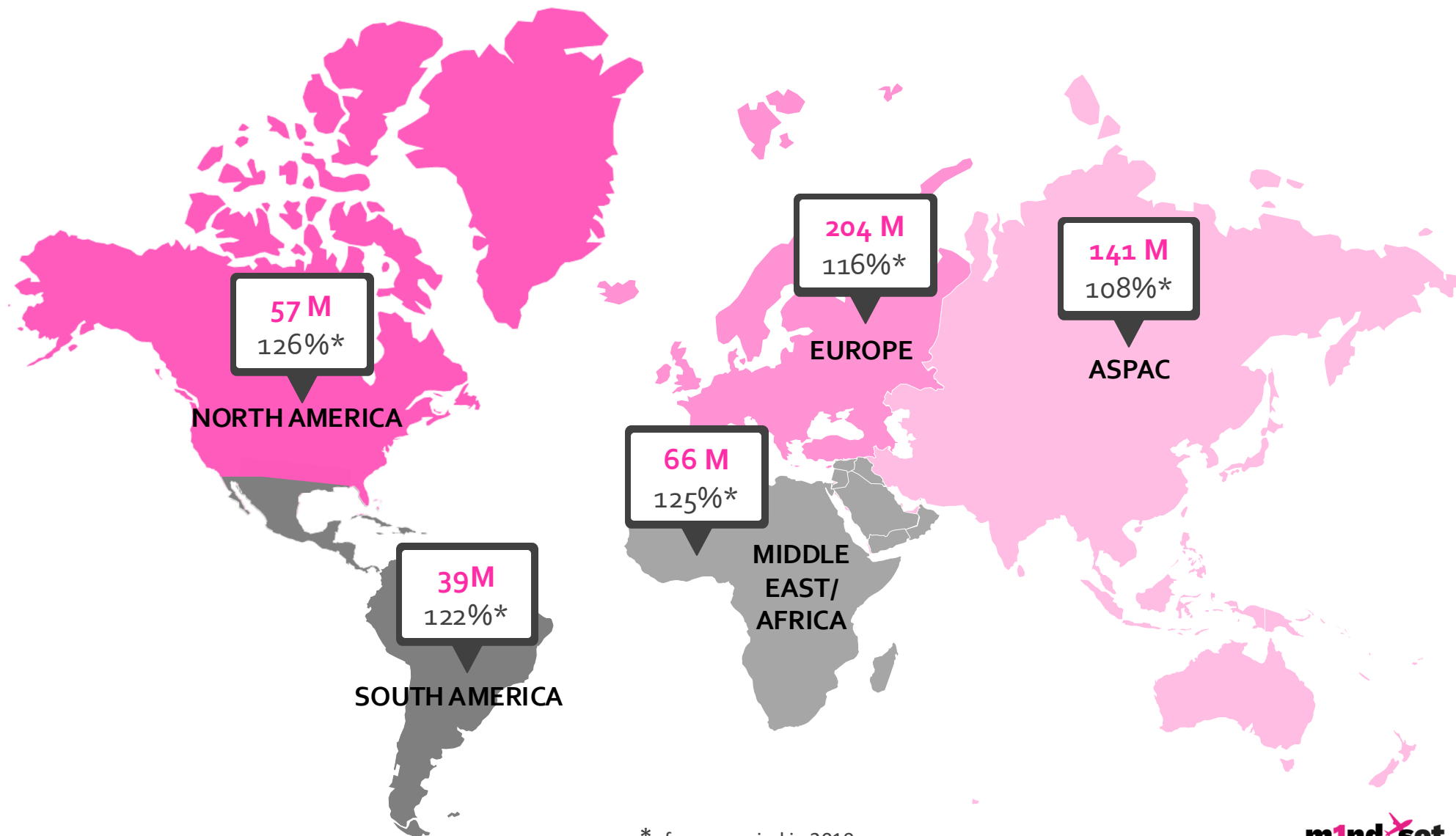
GLOBAL



505 M

116%

of same period in 2019



*of same period in 2019

TOP 10 AIRPORTS

January – March 2025
International Departures

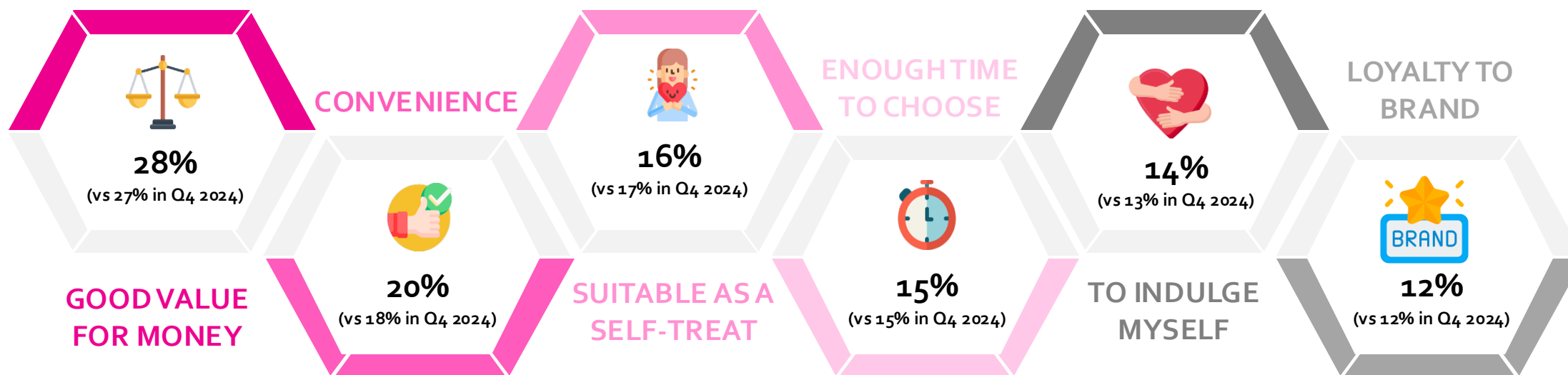
DXB - Dubai, AE	13.1 M	
LHR - London, GB	11.2 M	
SIN - Singapore, SG	10.9 M	
ICN - Seoul, KR	10.4 M	
HKG - Hong Kong, HK	9.2 M	
AMS - Amsterdam, NL	8.9 M	
CDG - Paris-De Gaulle, FR	8.8 M	
BKK – Bangkok, TH	7.6 M	
FRA - Frankfurt, DE	7.5 M	
KUL – Kuala Lumpur, MY	6.8 M	

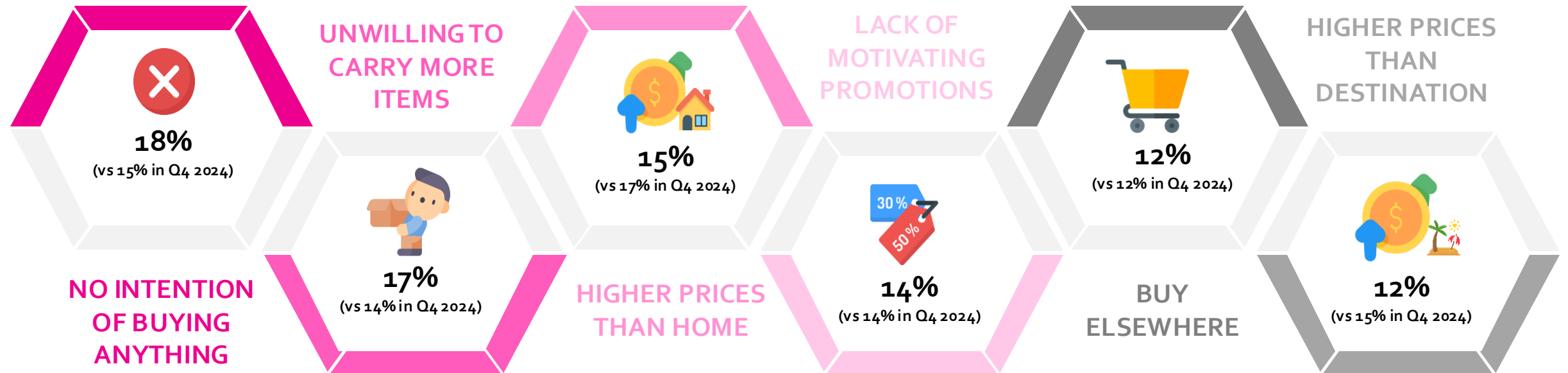
TOP 10 NATIONALITIES

January – March 2025
International Departures

	United States	50.4 M	
	United Kingdom	34.7 M	
	Germany	26.8 M	
	China	22.4 M	
	India	20.8 M	
	France	20.2 M	
	South Korea	17.0 M	
	Italy	16.8 M	
	Spain	16.5 M	
	Canada	13.8 M	

DRIVERS TO PURCHASE Q1 2025





PURPOSE OF PURCHASE

Q1 2025



■ FOR MYSELF

53%

(vs 55% in Q4 2024)



■ AS A GIFT

24%

(vs 22% in Q4 2024)



■ TO SHARE

16%

(vs 16% in Q4 2024)



■ ON REQUEST

7%

(vs 7% in Q4 2024)

Q1 2025

PLANNING LEVELS

■ Planned to buy a specific product

14%

■ Planned to buy a specific brand

13%

■ Planned with some idea in mind

19%

■ Planned without any specific idea

24%

■ Impulse purchase

30%

27%

SPECIFIC PLANNERS

(vs 27% in Q4 2024)

43%

UNDECIDED PLANNERS

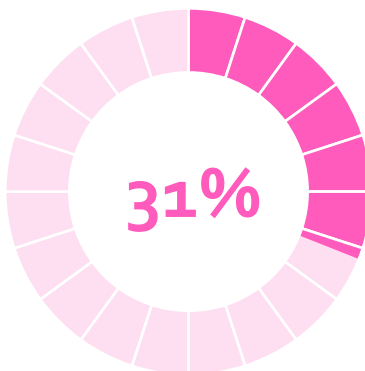
(vs 43% in Q4 2024)

30%

IMPULSE BUYERS

(vs 30% in Q4 2024)

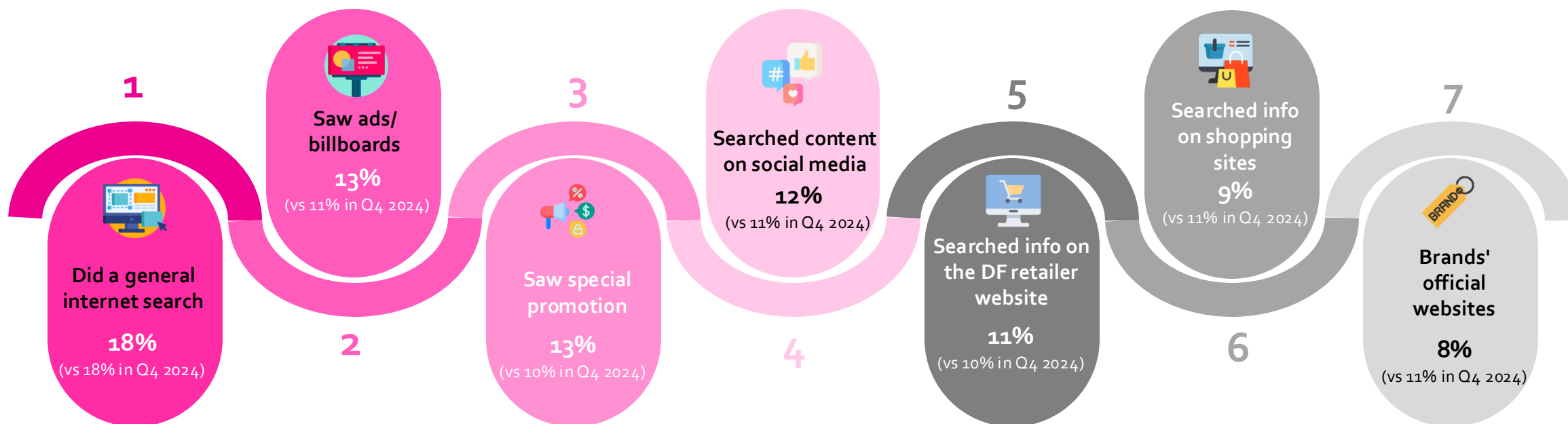
% OF DF SHOPPERS EXPOSED TO PRE-SHOPPING INFORMATION:



(vs 30% in Q4 2024)

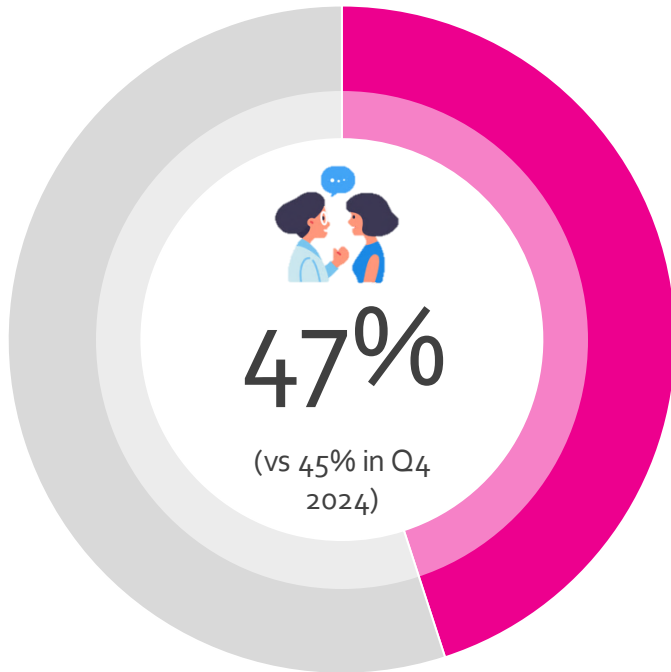
TOP TOUCH POINTS

(% out of those who notice touch points)



STAFF INTERACTION

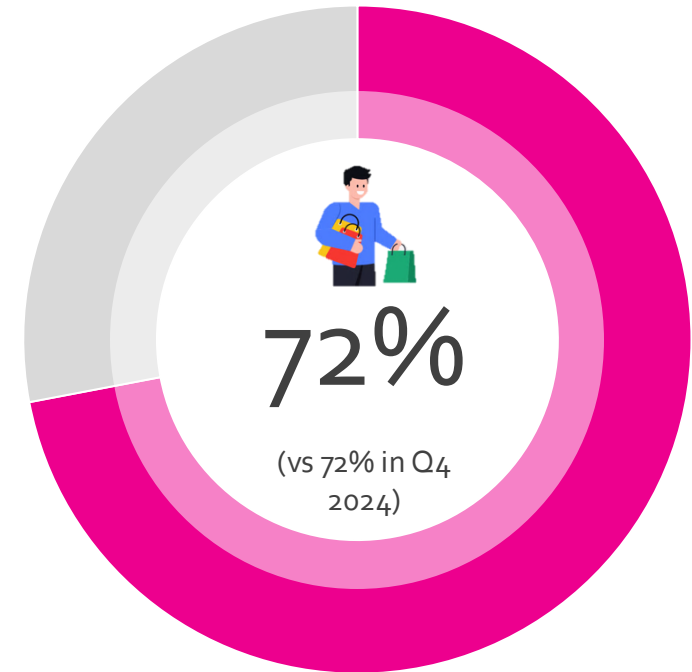
Q1 2025



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

Q1 2025

STAFF INFLUENCE



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