

DFWC QUARTERLY GLOBAL SHOPPING MONITOR

Q2 2025



in partnership
with



TOTAL INTERNATIONAL PAX DEPARTURES

Q2, 2025

GLOBAL



583 M

113%

of same period in 2019



North America
121%*

65 M

34 M

South America
115%*

Europe
115%*

284 M

68 M

Middle East & Africa
126%*

132 M

Asia & Pacific
101%*

TOP 10 AIRPORTS

Q2, 2025

International Departures

LHR - London, GB	12.9 M	
DXB - Dubai, AE	12.2 M	
SIN - Singapore, SG	10.6 M	
AMS - Amsterdam, NL	10.5 M	
CDG - Paris-De Gaulle, FR	10.3 M	
ICN - Seoul, KR	10.2 M	
FRA - Frankfurt, DE	9.1 M	
HKG - Hong Kong, HK	8.9 M	
IST – Istanbul, TR	7.7 M	
MAD – Madrid, ES	7.2 M	

TOP 10 NATIONALITIES

Q2, 2025

International Departures

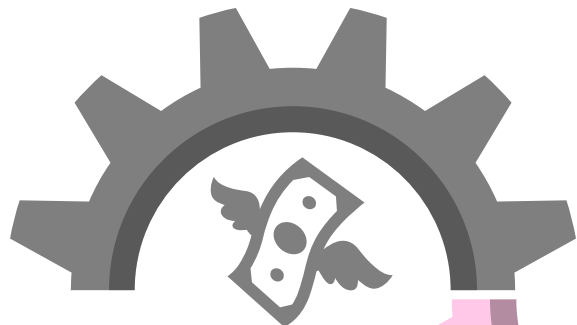
	United States	59.9 M	
	United Kingdom	49.1 M	
	Germany	36.1 M	
	France	25.2 M	
	India	23.5 M	
	Spain	22.2 M	
	China	20.9 M	
	Italy	20.8 M	
	South Korea	14.9 M	
	Turkey	14.1 M	

DRIVERS TO PURCHASE

Q2 2025

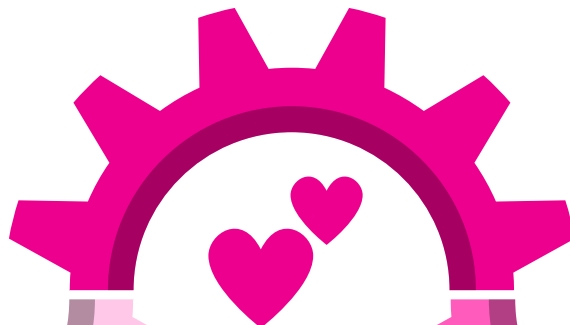
**Good value for
money**
27%

(vs 27% in Q1 2025)



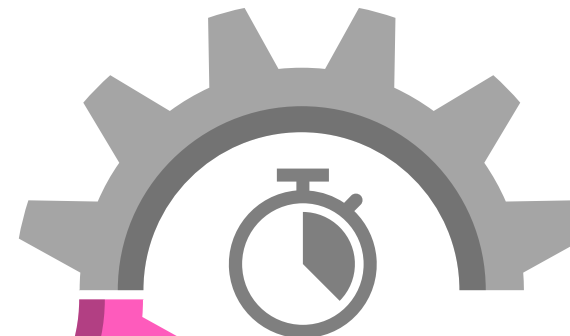
**Suitable as self-
treat**
17%

(vs 16% in Q1 2025)



**Had enough
time to choose**
15%

(vs 15% in Q1 2025)



Convenience
21%

(vs 20% in Q1 2025)



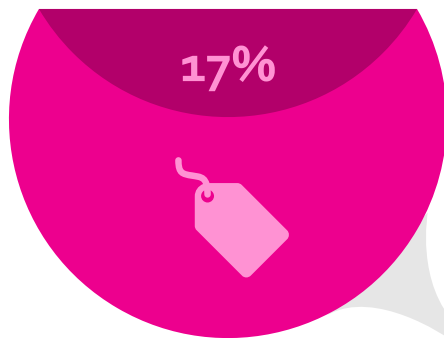
Loyalty to brand
16%

(vs 12% in Q1 2025)



BARRIERS TO PURCHASE

Q2 2025

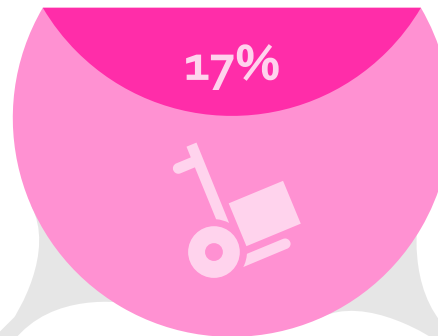


Higher prices vs home

(vs 15% in Q1 2025)

No intention of buying

(vs 18% in Q1 2025)

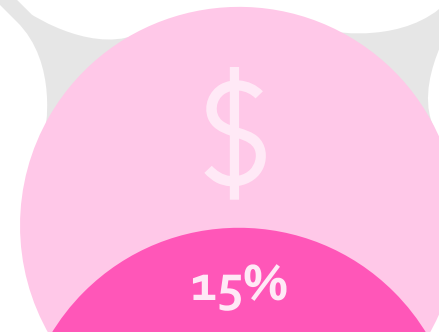


Unwilling to carry more

(vs 17% in Q1 2025)

No motivating discounts

(vs 14% in Q1 2025)



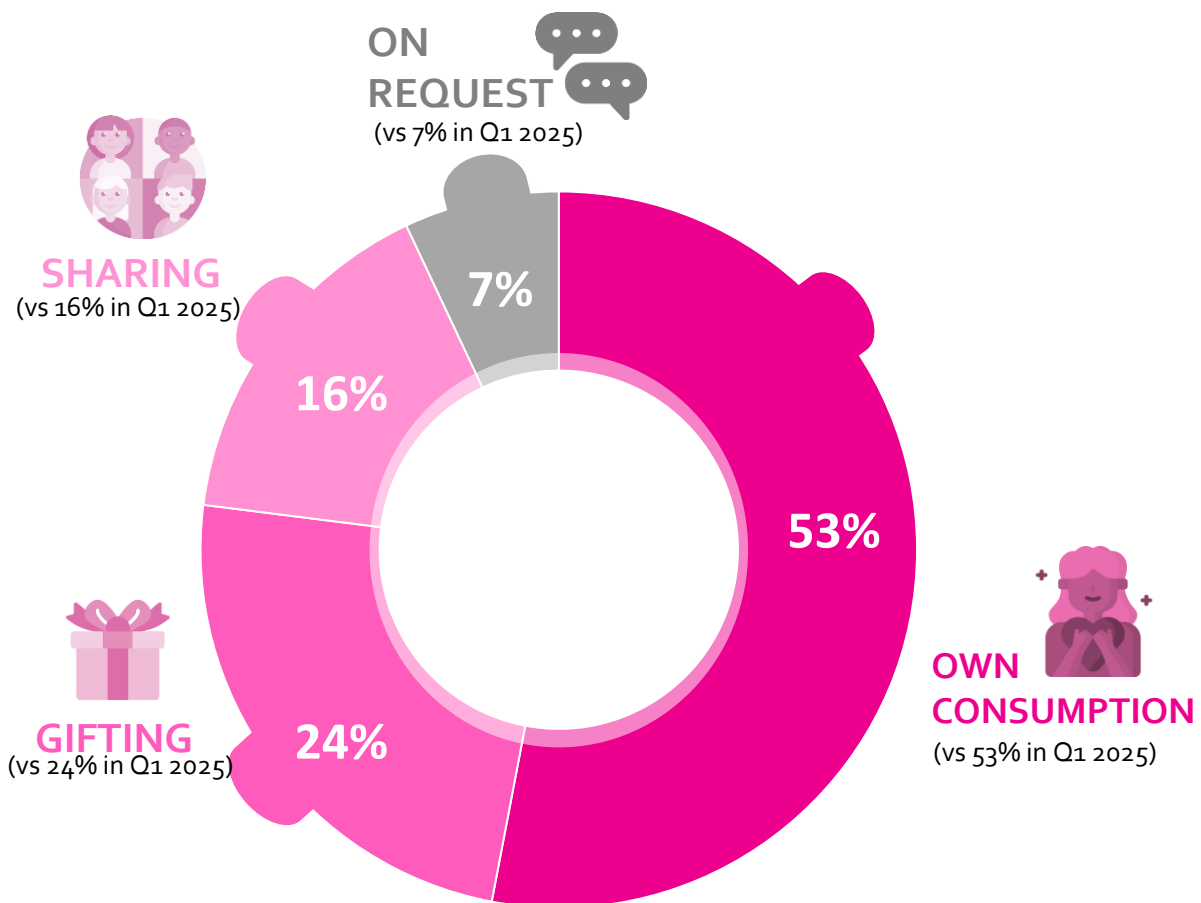
Buy elsewhere

(vs 12% in Q1 2025)

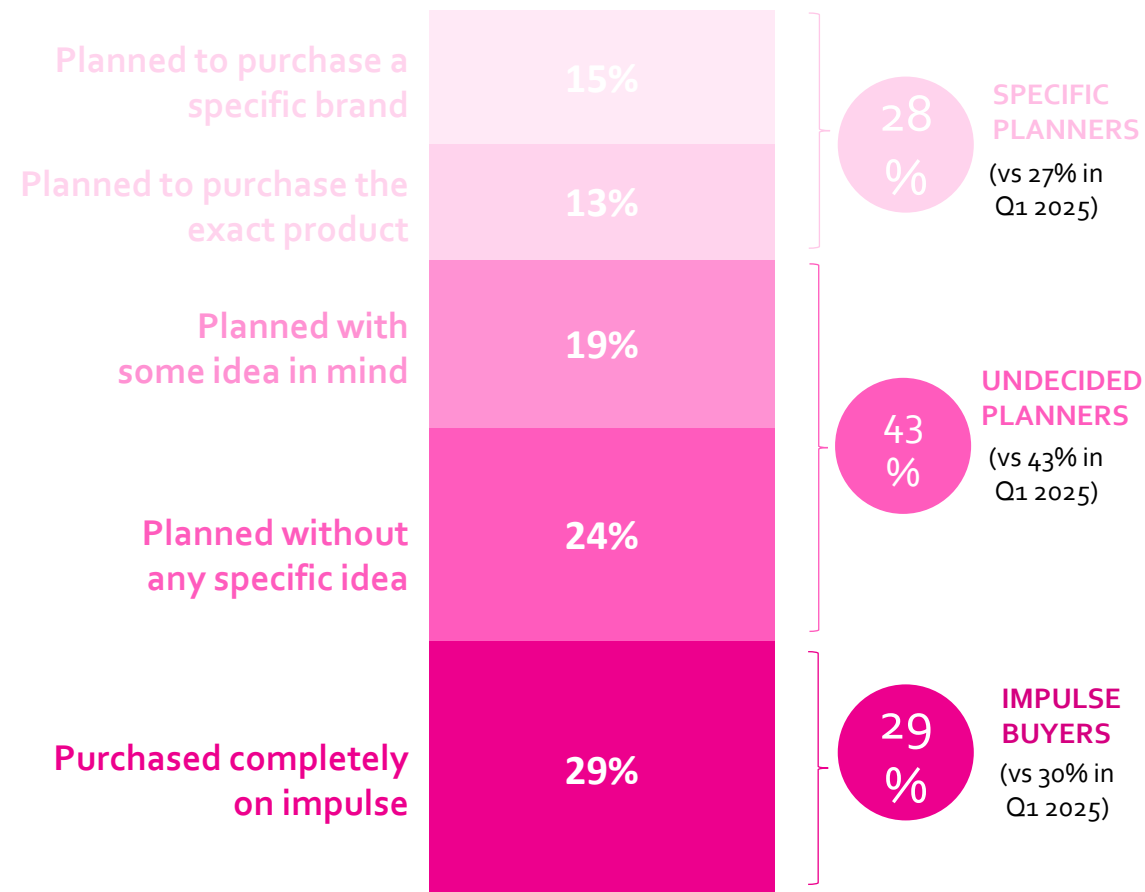
PURPOSE OF PURCHASE & PLANNING LEVELS

Q2 2025

PURPOSE OF PURCHASE



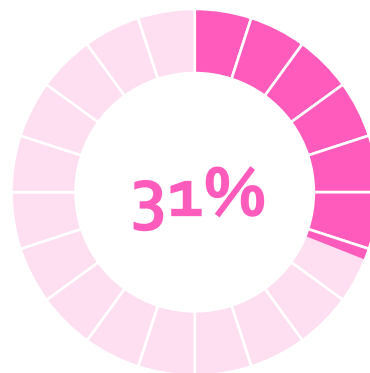
PLANNING LEVELS



MOMENTS OF EXPOSURE TO PRE-STORE TOUCH POINTS

Q2 2025

% OF DF SHOPPERS EXPOSED
TO PRE-SHOPPING
INFORMATION:



(vs 31% in Q1 2025)

Amongst those exposed to touch points



18%

(vs 18% in Q1 2025)

**General internet
search**



13%

(vs 13% in Q1 2025)

**Saw a special
promotion**



12%

(vs 12% in Q1 2025)

**Searched content on
social media**



12%

(vs 11% in Q1 2025)

**Searched content on
DF retailer website**



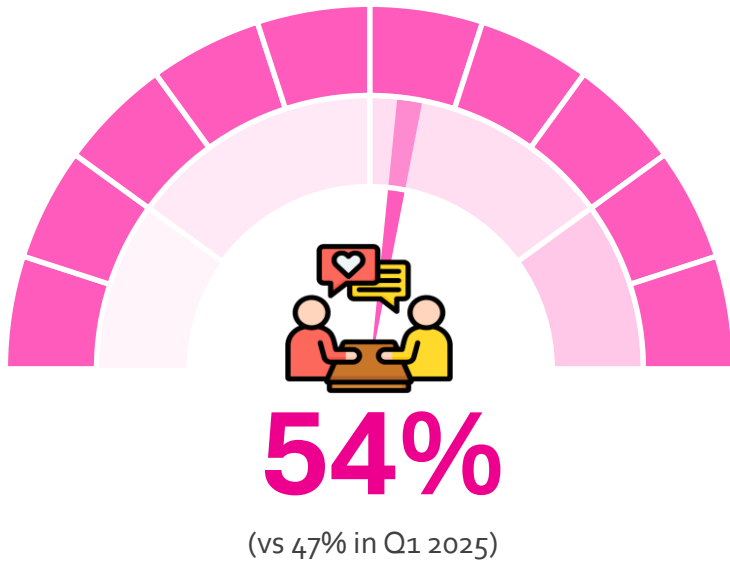
11%

(vs 12% in Q1 2025)

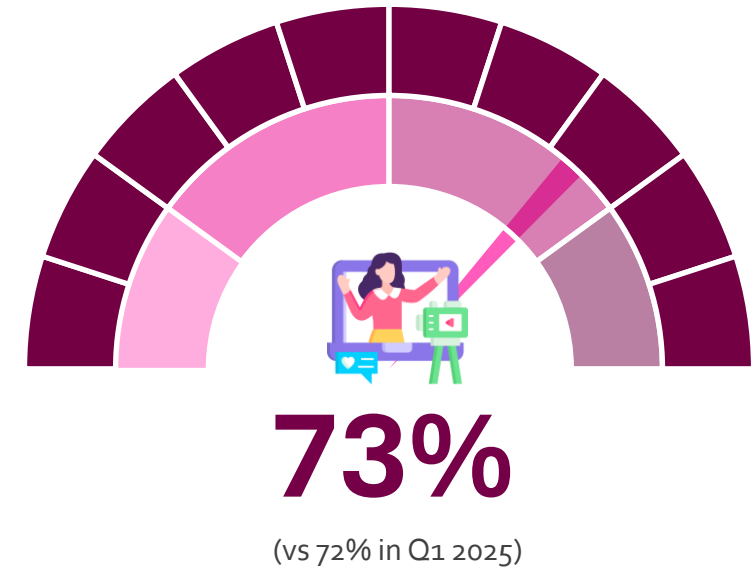
Saw ads/ billboards

SALES STAFF INTERACTION & INFLUENCE

Q2 2025



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



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

METHODOLOGY & SAMPLE SIZE

Data Collected through m1nd-set's B1S tracking survey

Current sample of over 200,000 respondents.

Covering the main nationalities, regions, categories and sub-categories, and on-going since early 2016.

RECRUITMENT & DATA COLLECTION

UP TO Q1 2020 (PRE COVID-19)

FACE-TO-FACE RECRUITMENT followed by self-completed tablet or online interviews (at the airport or directly after flying).

AS OF Q1 2021 (POST COVID-19)

ONLINE RECRUITMENT using m1nd-set's unique database of international travellers (recruited at airports around the world)

- ✓ **Fieldwork:** Between Q2 and Q4, 2020 fieldwork was put on hold for nine months due to the covid-19 outbreak, which means that for the year 2020 we only covered the first quarter.
- ✓ **Representative Sample:** Quotas by nationalities are defined based on international traffic data provided by IATA exclusively to m1nd-set through B1S, to represent the key nationalities that have been travelling internationally during the relevant period of time.



ONGOING INTERVIEWING

(quarterly, to fully capture seasonality aspects).



CROSS-CATEGORY The first part of the survey covers generic aspects, the second part is category based (for each category visited / purchased by respondents).



15 MINUTES questionnaire on average



QUESTIONNAIRE TRANSLATED into the 10 top languages



Sample size

Q1, 2025	N=5.548
Q2, 2025	N=6.498