

DFWC QUARTERLY GLOBAL SHOPPING MONITOR Full Year 2025

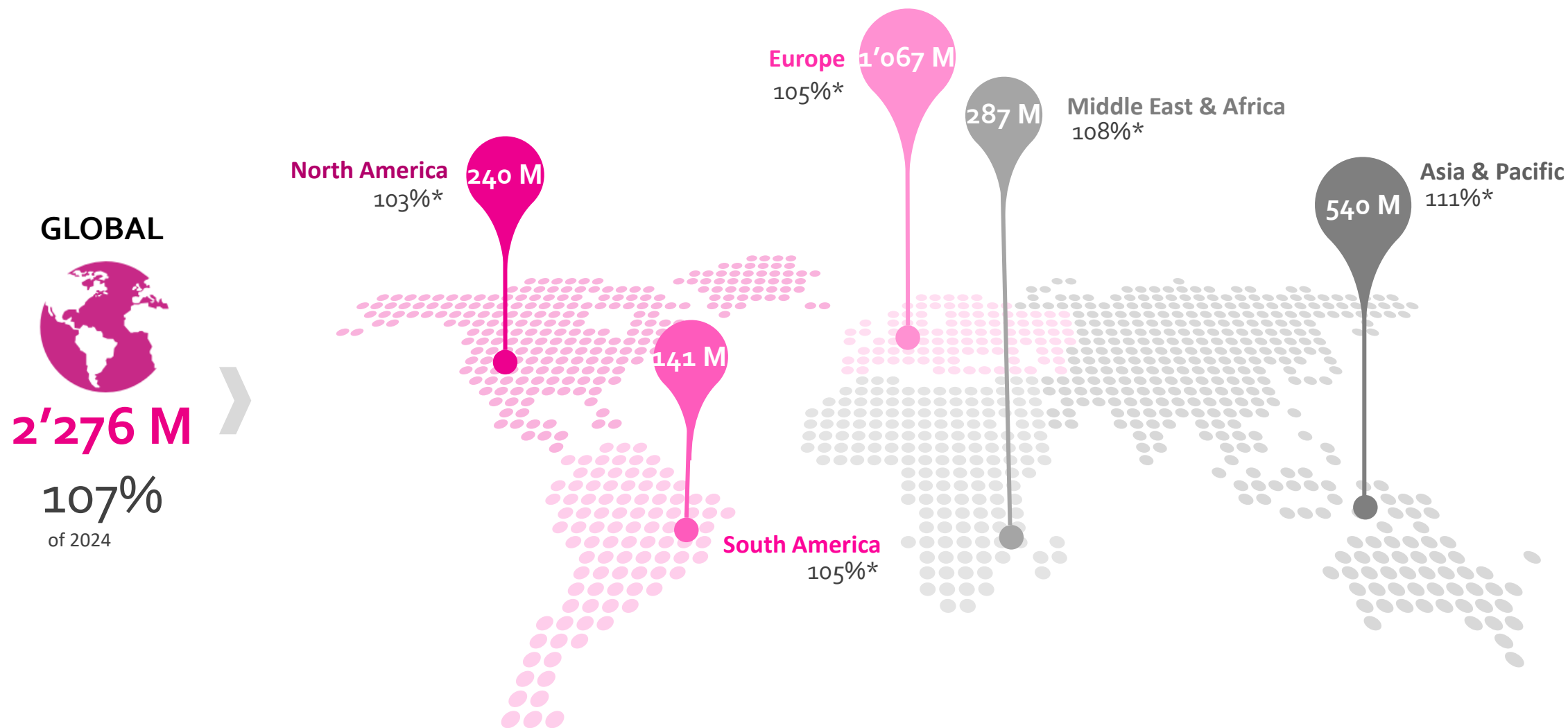


in partnership
with



TOTAL INTERNATIONAL PAX DEPARTURES *

Full Year 2025



TOP 10 AIRPORTS

Full Year 2025

*International Departures**

DXB - Dubai, AE	50.5 M	
LHR - London, GB	49.6 M	
SIN - Singapore, SG	41.8 M	
ICN - Seoul, KR	41.7 M	
AMS - Amsterdam, NL	40.0 M	
CDG - Paris-De Gaulle, FR	40.0 M	
HKG - Hong Kong, HK	36.4 M	
FRA - Frankfurt, DE	33.9 M	
IST – Istanbul, TR	32.1 M	
DOH – Doha, QA	28.2 M	

TOP 10 NATIONALITIES

Full Year 2025

*International Departures**

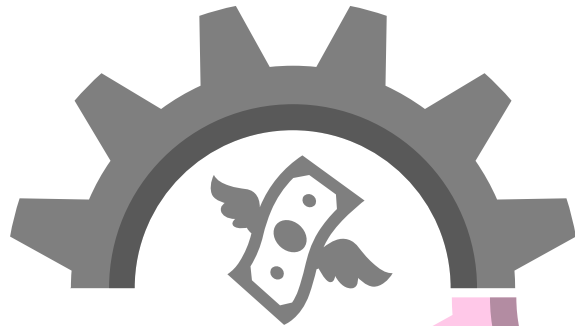
	United States	221.1 M	
	United Kingdom	177.4 M	
	Germany	130.9 M	
	France	94.6 M	
	India	91.1 M	
	Spain	87.3 M	
	China	86.3 M	
	Italy	83.5 M	
	South Korea	61.3 M	
	Turkey	59.4 M	

APPEAL FACTORS OF DF VS OTHER CHANNELS

FY 2025

**Good value for
money**
27%

(vs 25% in 2024)



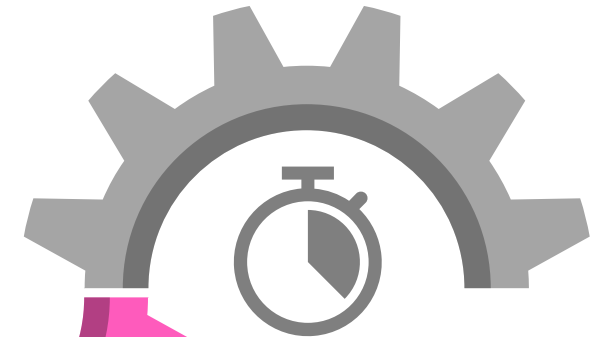
**Suitable as self-
treat**
18%

(vs 16% in 2024)



**Had enough
time to choose**
15%

(vs 15% in 2024)



Convenience
21%

(vs 20% in 2024)



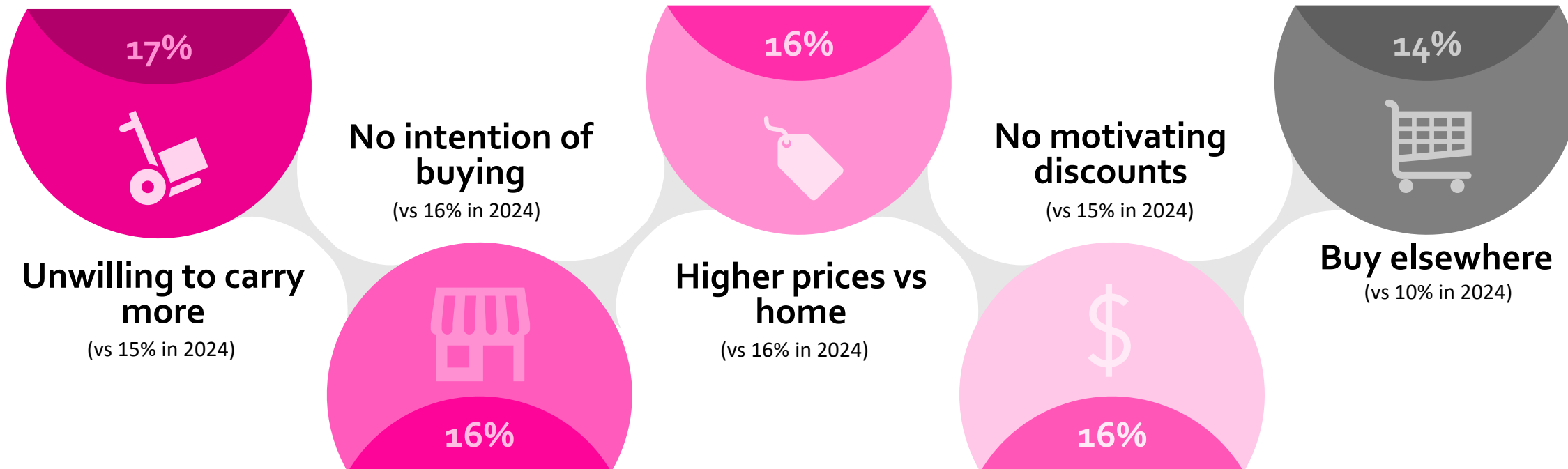
Loyalty to brand
16%

(vs 15% in 2024)



BARRIERS TO PURCHASE

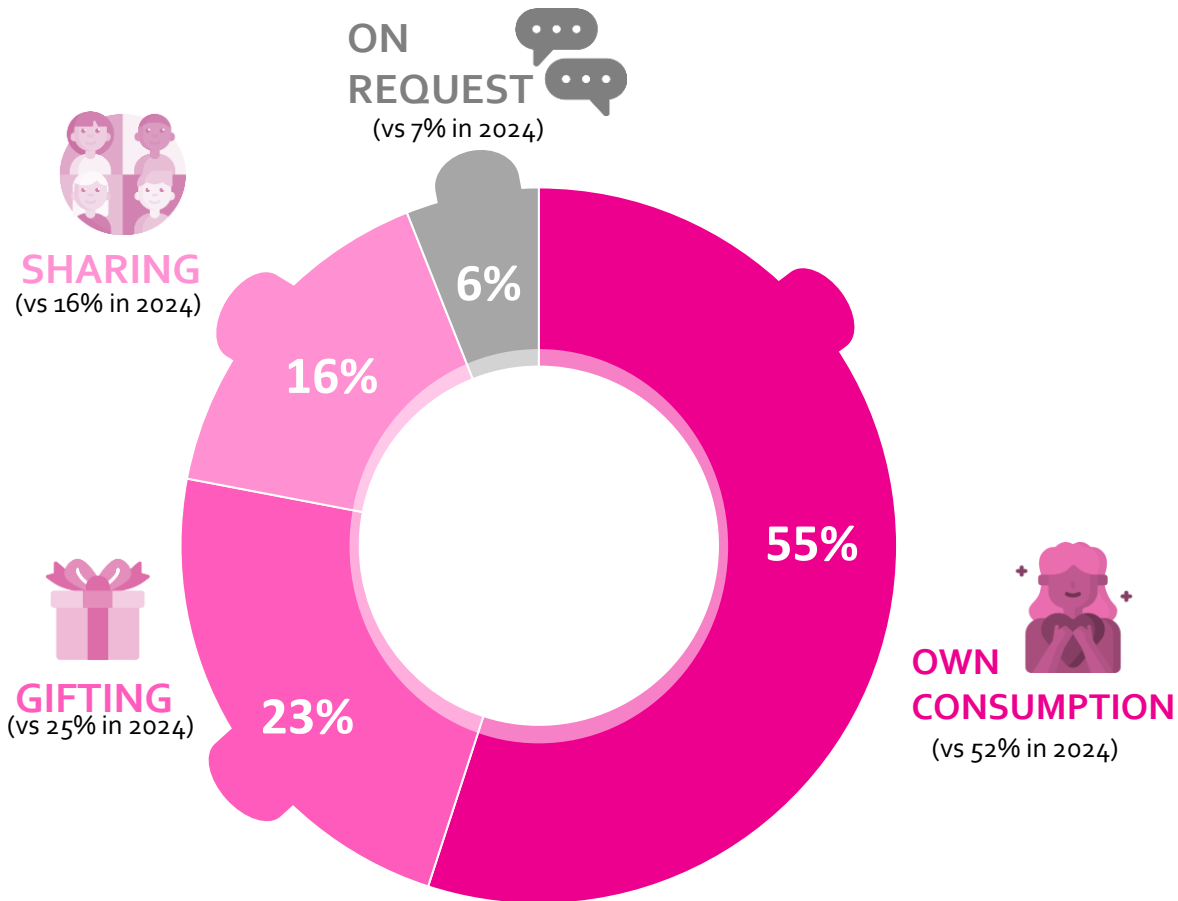
FY 2025



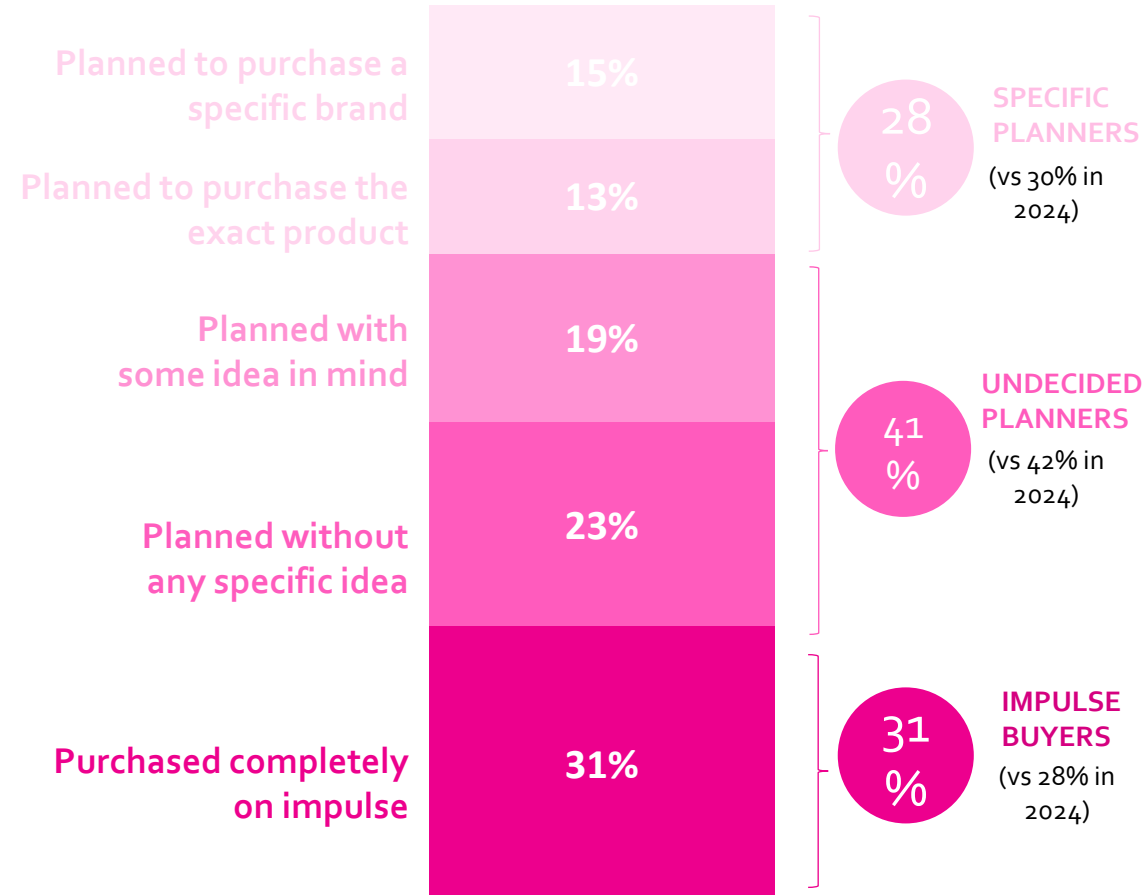
PURPOSE OF PURCHASE & PLANNING LEVELS

FY 2025

PURPOSE OF PURCHASE



PLANNING LEVELS



NEW PRODUCTS & TRAVEL RETAIL EXCLUSIVES

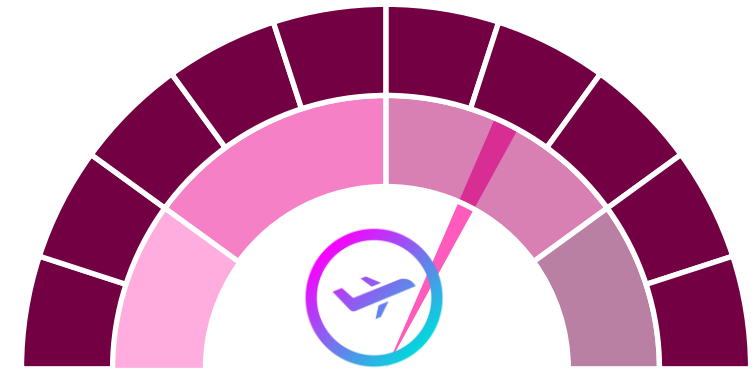
FY 2025



63%

(vs 64% in 2024)

of Duty Free shoppers **look for products they have never bought before**



64%

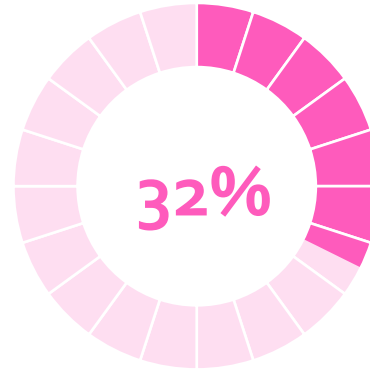
(vs 57% in 2024)

of Duty Free shoppers **look for Travel Retail Exclusives / unique products**

MOMENTS OF EXPOSURE TO PRE-STORE TOUCH POINTS

FY 2025

% OF DF SHOPPERS EXPOSED
TO PRE-SHOPPING
INFORMATION:



(vs 32% in 2024)

Amongst those exposed to touch points



17%

(vs 17% in 2024)

**General internet
search**



13%

(vs 12% in 2024)

**Searched content on
social media**



11%

(vs 12% in 2024)

Saw ads / billboards



11%

(vs 12% in 2024)

**Searched content on
DF retailer website**



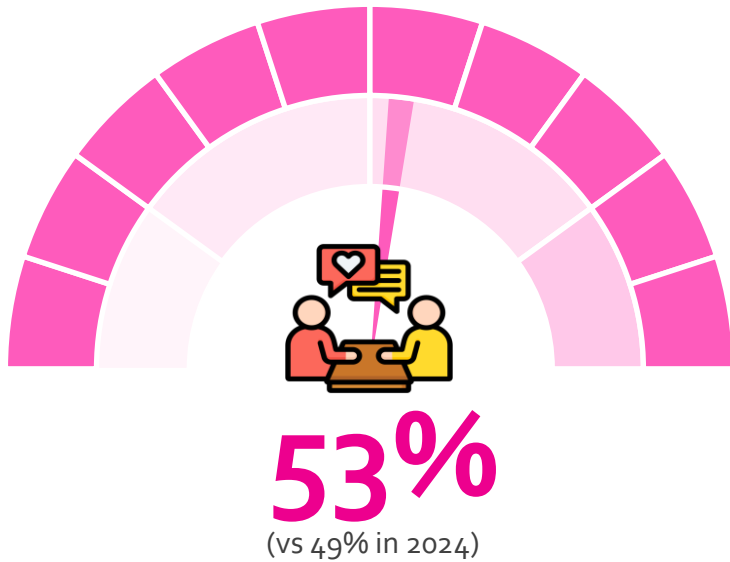
11%

(vs 11% in 2024)

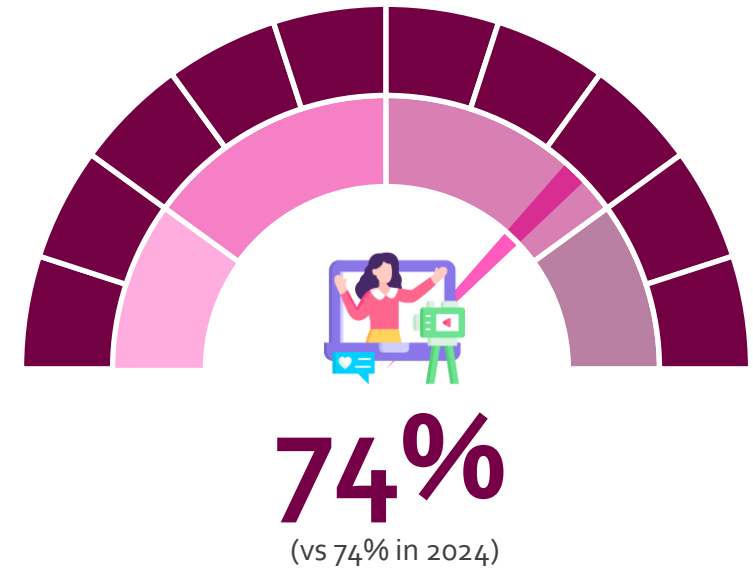
**Saw a special promo
/ activity for a brand**

SALES STAFF INTERACTION & INFLUENCE

FY 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 250,000 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

2024	N= 26.870
2025	N= 24.537

METHODOLOGY – AIR TRAFFIC

