

DFWC QUARTERLY GLOBAL SHOPPING MONITOR

Q1 2026



in partnership
with

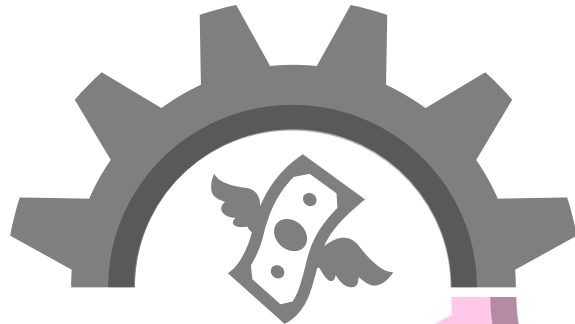


DRIVERS TO PURCHASE

Q1 2026

**Good value for
money**
28%

(vs 25% in Q4 2025)



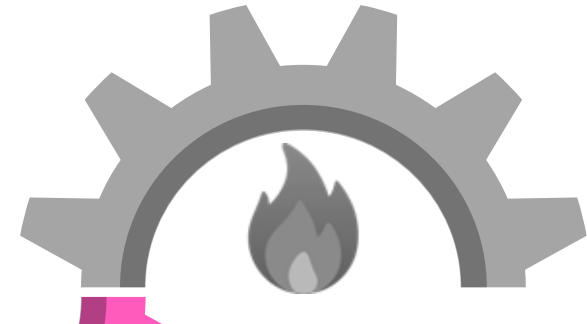
**Suitable as self-
treat**
21%

(vs 20% in Q4 2025)



**Trendy
Brand**
18%

(vs 15% in Q4 2025)



Convenience
21%

(vs 21% in Q4 2025)



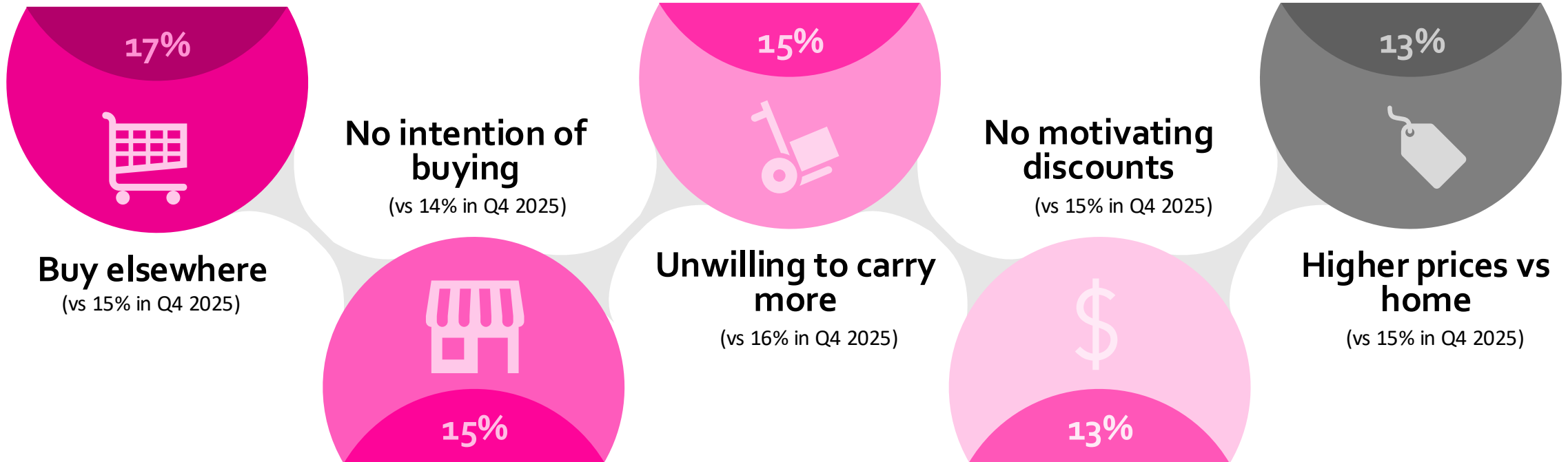
Loyalty to brand
18%

(vs 18% in Q4 2025)



BARRIERS TO PURCHASE

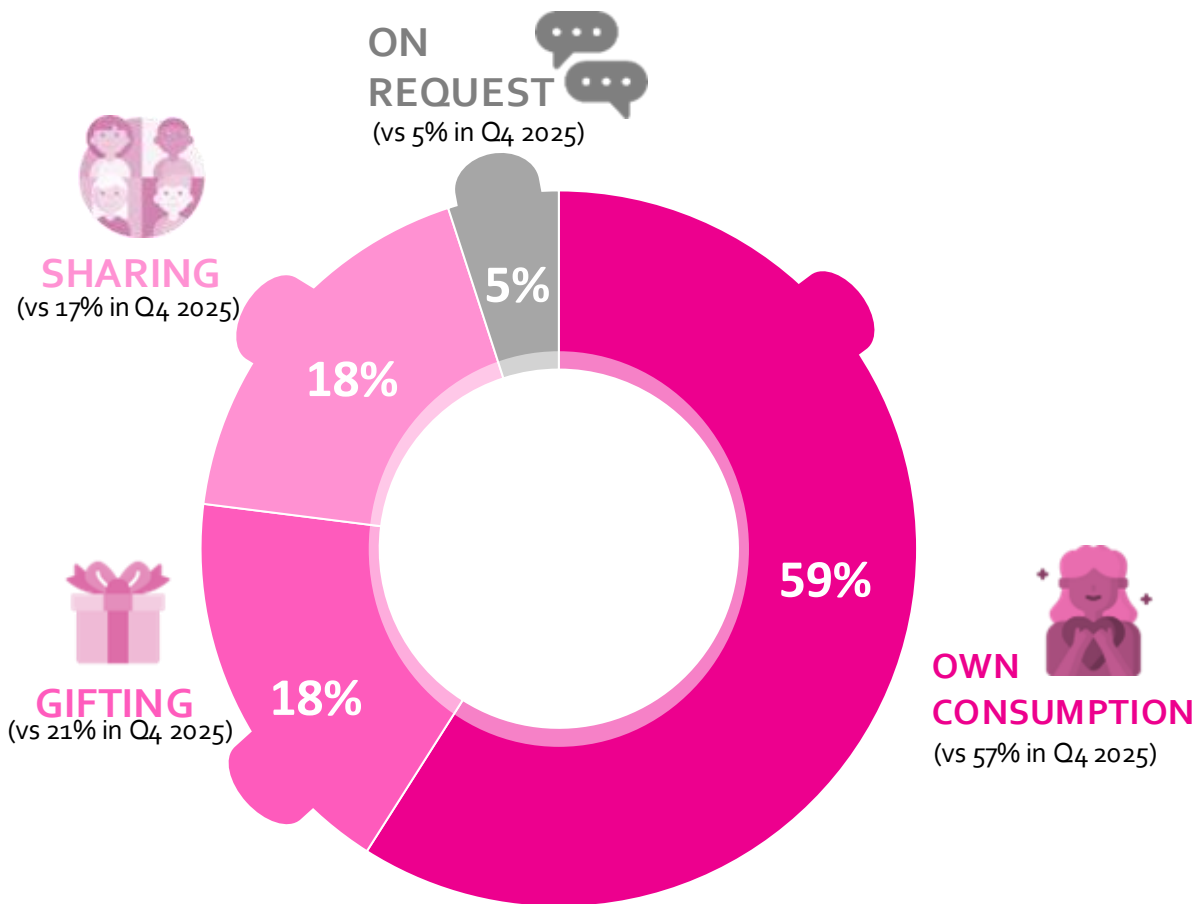
Q1 2026



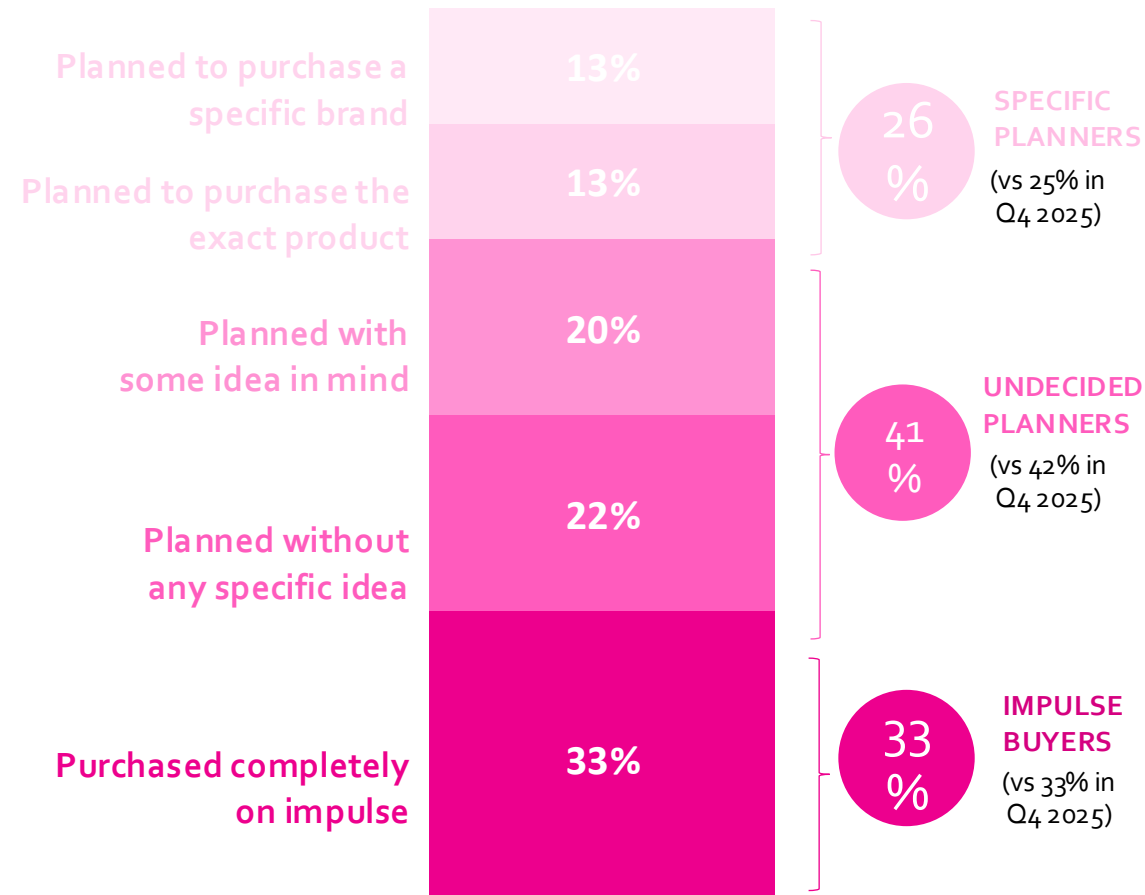
PURPOSE OF PURCHASE & PLANNING LEVELS

Q1 2026

PURPOSE OF PURCHASE

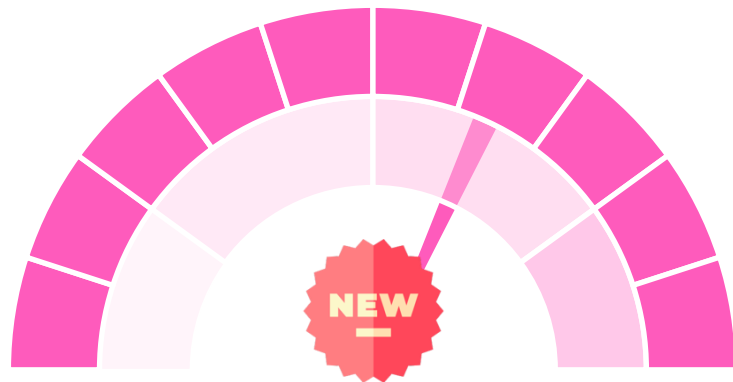


PLANNING LEVELS



NEW PRODUCTS & TRAVEL RETAIL EXCLUSIVES

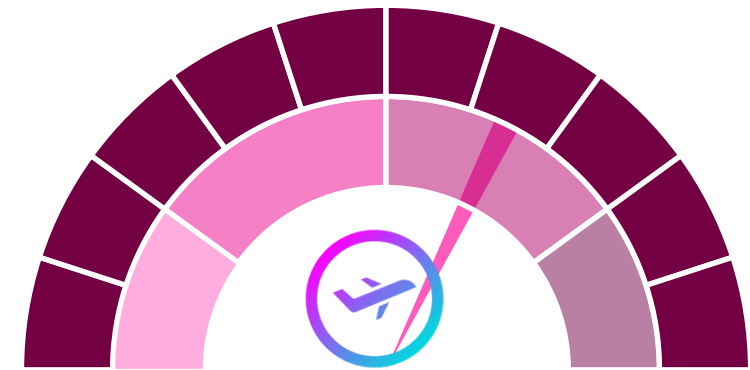
Q1 2026



64%

(vs 63% in Q4 2025)

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



66%

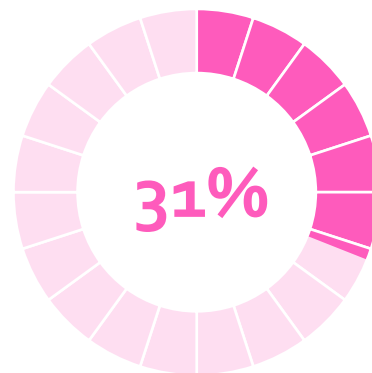
(vs 67% in Q4 2025)

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

MOMENTS OF EXPOSURE TO PRE-STORE TOUCH POINTS

Q1 2026

% OF DF SHOPPERS EXPOSED
TO PRE-SHOPPING
INFORMATION:



(vs 30% in Q4 2025)

Amongst those exposed to touch points



17%

(vs 16% in Q4 2025)

**General internet
search**



14%

(vs 11% in Q4 2025)

**Searched content on
social media**



13%

(vs 11% in Q4 2025)

Saw ads / billboards



13%

(vs 9% in Q4 2025)

**Searched content on
DF retailer website**



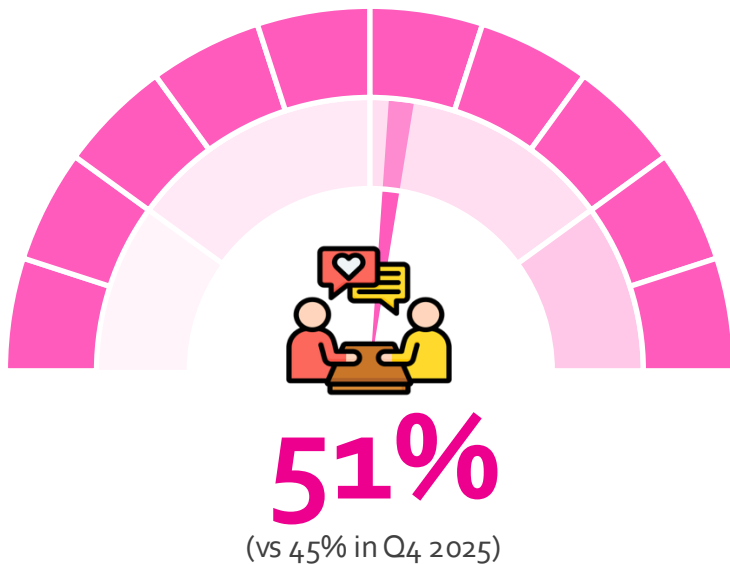
13%

(vs 11% in Q4 2025)

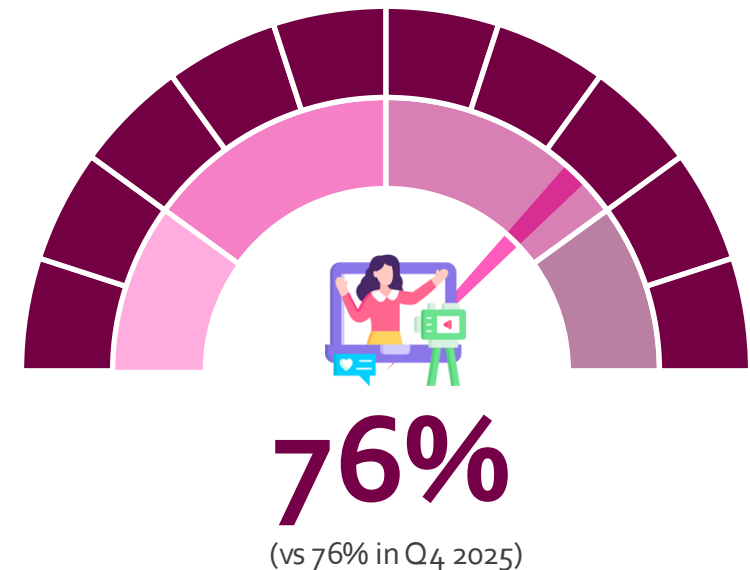
**Searched content on
travel website**

SALES STAFF INTERACTION & INFLUENCE

Q1 2026



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

Q4 2025	N= 5.704
Q1 2026	N= 7.967