

DFWC QUARTERLY GLOBAL SHOPPING MONITOR Q2 2026

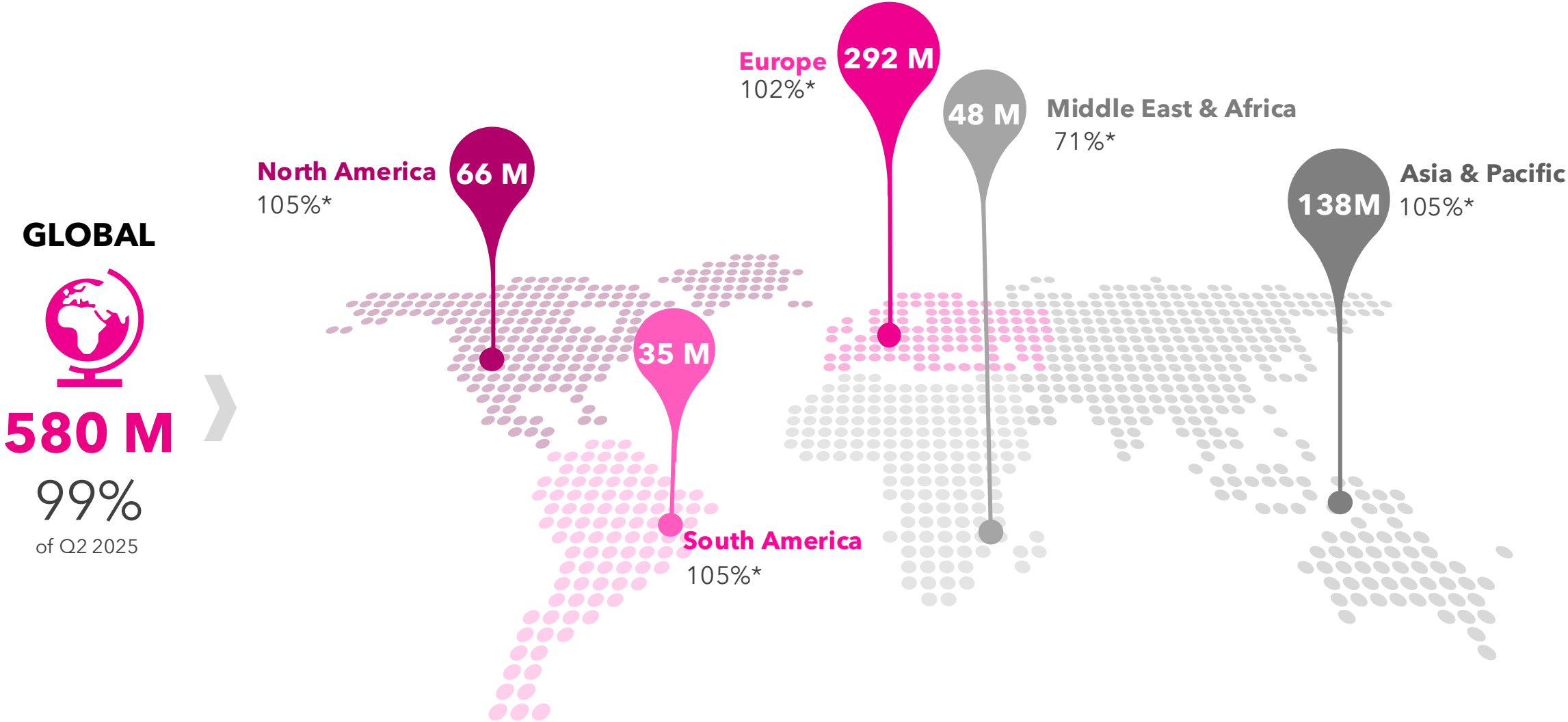


in partnership
with



TOTAL INTERNATIONAL PAX DEPARTURES **

Q2 2026



** International Departures refer to the count of passengers departing on an international flight, and includes both connecting and non-connecting passengers

*of same period in 2025

Source: m1nd-set B1S / IATA NTR

TOP 10 AIRPORTS

Q2 2026

*International Departures**

LHR - London, GB	12.7 M
AMS - Amsterdam, NL	10.9 M
SIN - Singapore, SG	10.9 M
ICN - Seoul, KR	10.8 M
CDG - Paris-De Gaulle, FR	10.4 M
HKG - Hong Kong, HK	10.3 M
FRA - Frankfurt, DE	9.2 M
IST - Istanbul, TR	7.6 M
MAD -Madrid, ES	7.5 M
KUL - Kuala Lumpur, MY	7.0 M

TOP 10 NATIONALITIES

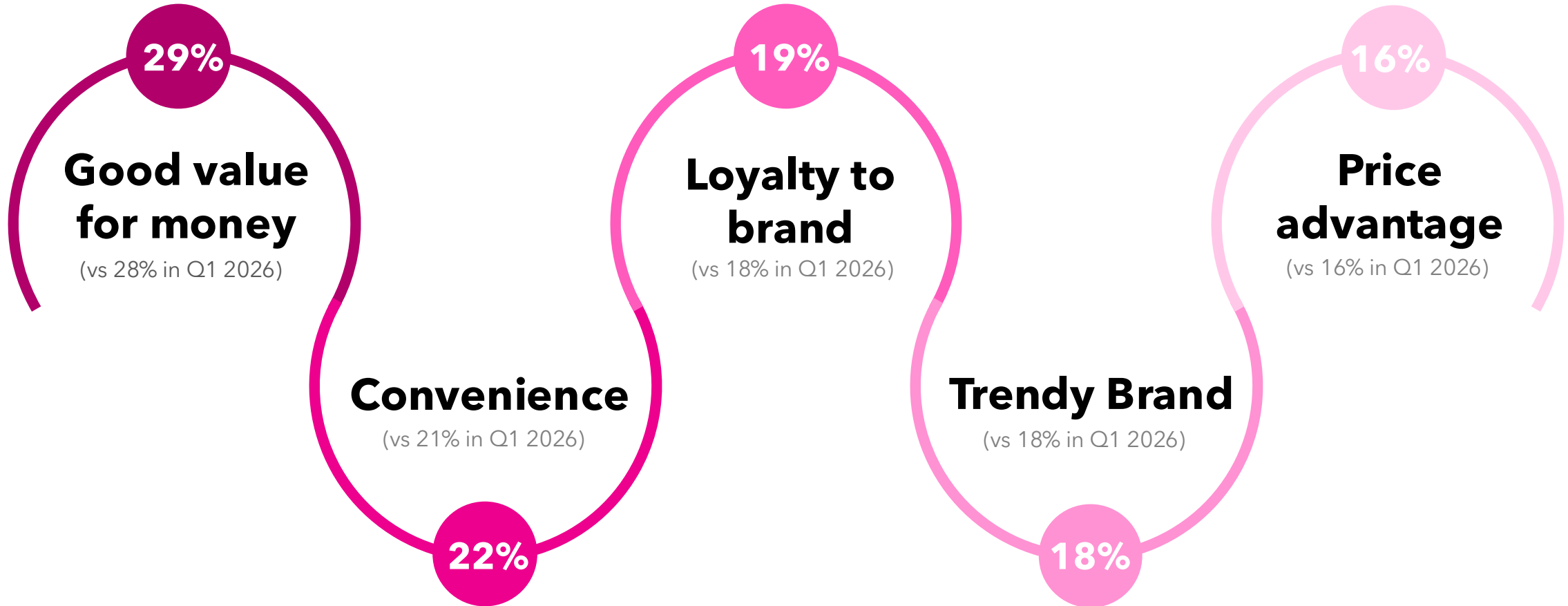
Q2 2026

*International Departures**

	United States	61.7 M
	United Kingdom	50.3 M
	Germany	35.7 M
	France	25.1 M
	Spain	23.0 M
	China	21.3 M
	Italy	20.7 M
	India	18.8 M
	South Korea	15.8 M
	Netherlands	14.3 M

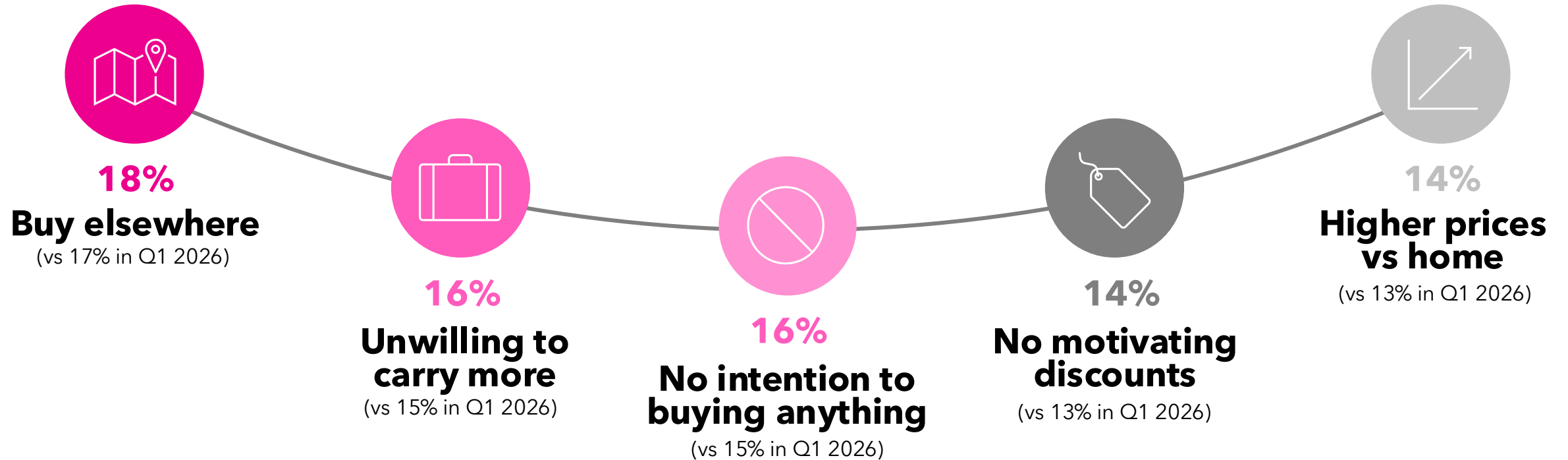
DRIVERS TO PURCHASE

Q2 2026



BARRIERS TO PURCHASE

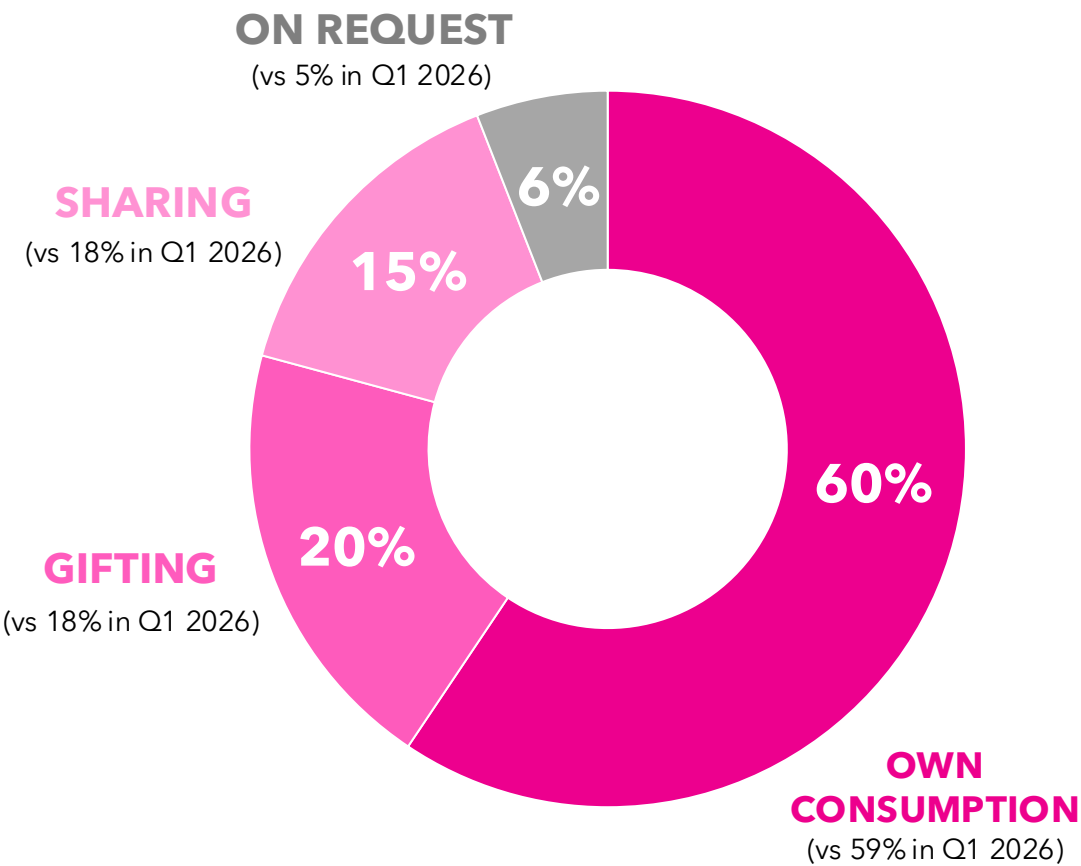
Q2 2026



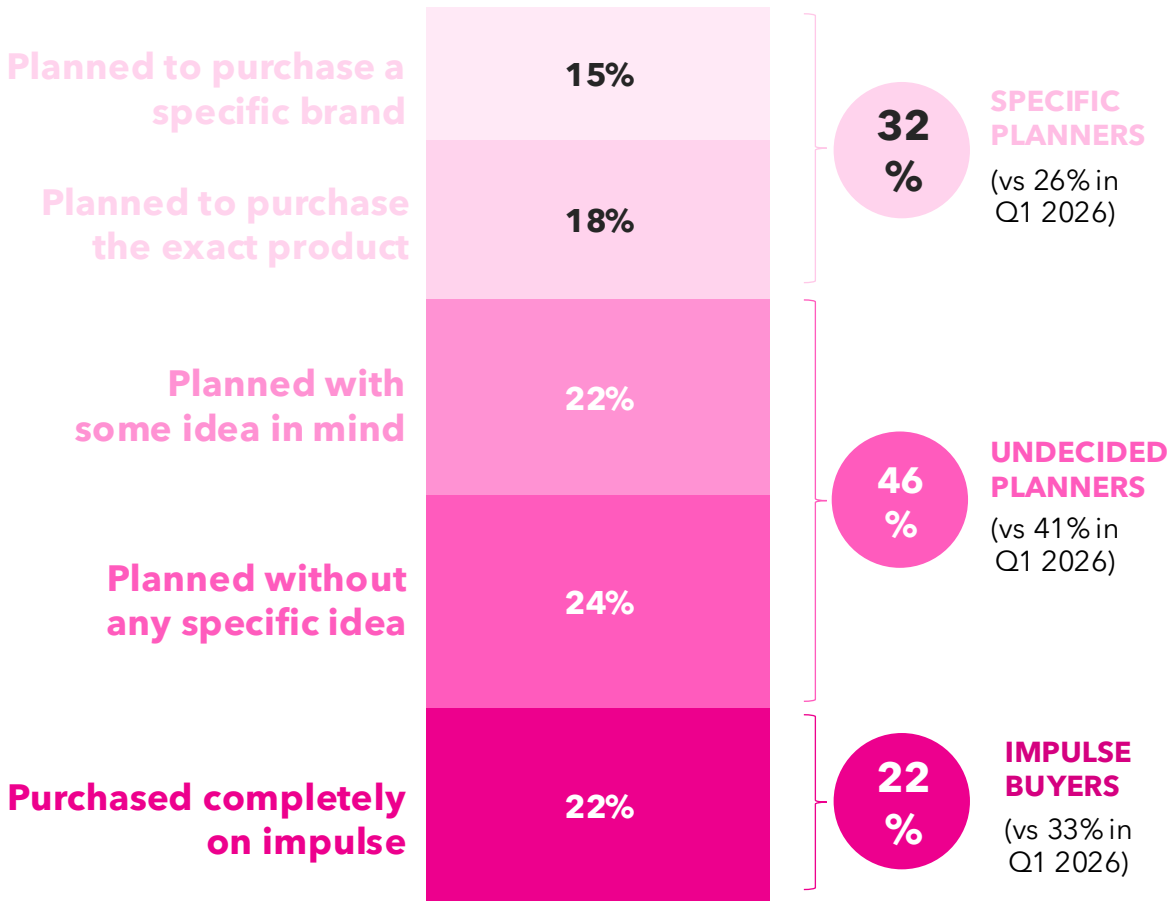
PURPOSE OF PURCHASE & PLANNING LEVELS

Q2 2026

PURPOSE OF PURCHASE

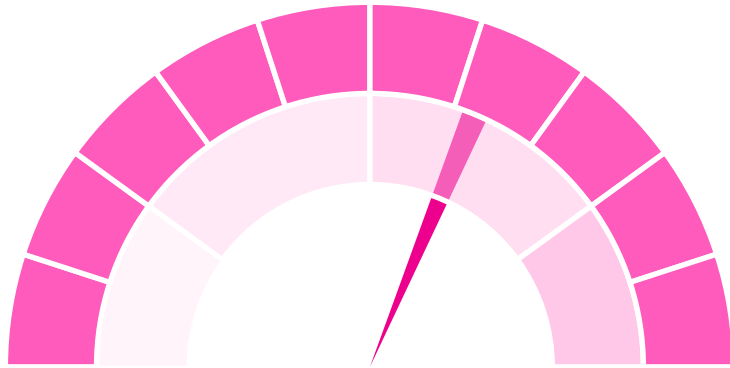


PLANNING LEVELS



NEW PRODUCTS & TRAVEL RETAIL EXCLUSIVES

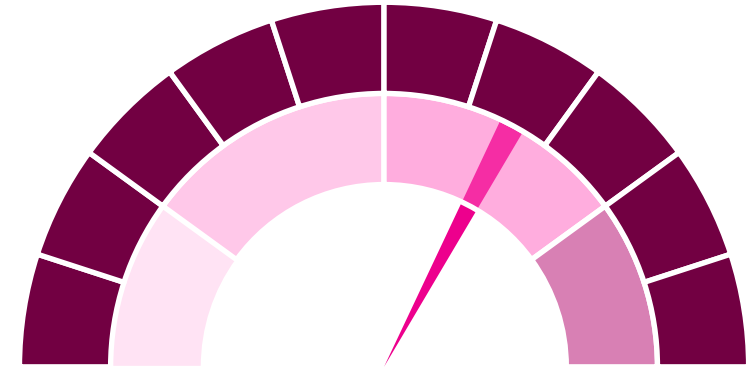
Q2 2026



62%

(vs 64% in Q1 2026)

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



65%

(vs 66% in Q1 2026)

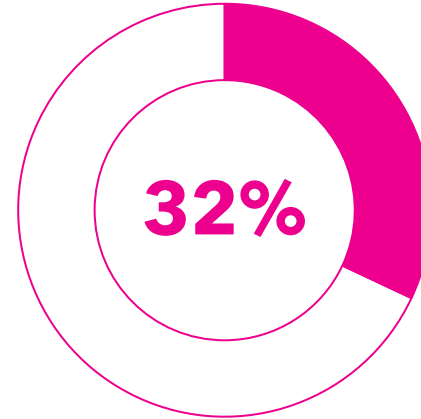
of Duty Free shoppers look for
**Travel Retail Exclusives /
unique products**

MOMENTS OF EXPOSURE TO PRE-STORE TOUCH POINTS

Q2 2026

% OF DF SHOPPERS EXPOSED TO PRE-SHOPPING INFORMATION:

(vs 31% in Q1 2026)



Amongst those exposed to touch points



21%

(vs 17% in Q1 2026)

General internet search



16%

(vs 14% in Q1 2026)

Searched content on social media



16%

(vs 13% in Q1 2026)

Searched content on DF retailer website



16%

(vs 13% in Q1 2026)

Searched content on travel website



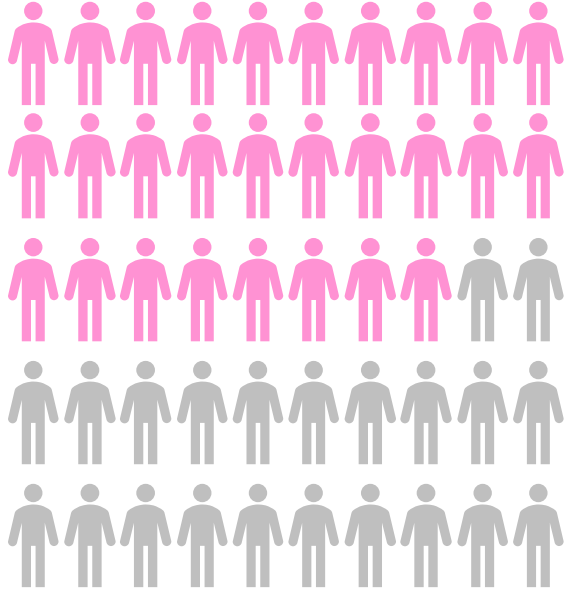
15%

(vs 13% in Q1 2026)

Saw ads / billboards

SALES STAFF INTERACTION & INFLUENCE

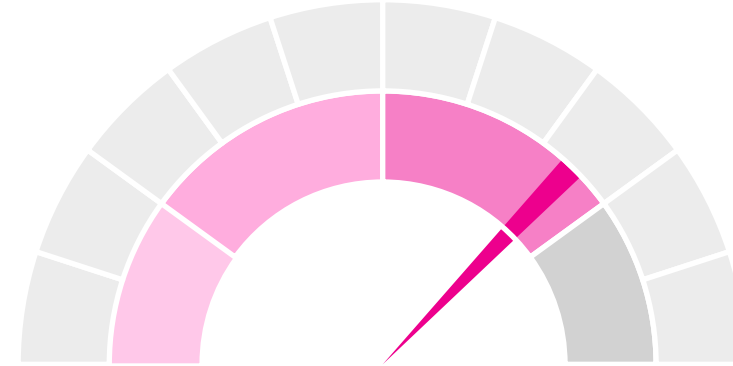
Q2 2026



56%

(vs 51% in Q1 2026)

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



75%

(vs 76% in Q1 2026)

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.



Sample size

Q1 2026	N= 7.967
Q2 2026	N= 8.941

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

METHODOLOGY - AIR TRAFFIC

