

DFWC QUARTERLY GLOBAL SHOPPING MONITOR

Q3 2025



in partnership
with



TOTAL INTERNATIONAL PAX DEPARTURES *

Q3, 2025

GLOBAL



634 M

112%

of same period in 2019



North America
121%*

65 M

Europe
113%*

326 M

74 M

Middle East & Africa
122%*

Asia & Pacific
102%*

135 M

35 M

South America
118%*

TOP 10 AIRPORTS

Q3, 2025
International Departures*

LHR - London, GB	13.8 M	
DXB - Dubai, AE	12.6 M	
AMS - Amsterdam, NL	11.5 M	
CDG - Paris-De Gaulle, FR	11.0 M	
ICN - Seoul, KR	10.6 M	
SIN - Singapore, SG	10.4 M	
FRA - Frankfurt, DE	9.9 M	
IST – Istanbul, TR	9.0 M	
HKG - Hong Kong, HK	8.8 M	
MAD – Madrid, ES	7.4 M	

TOP 10 NATIONALITIES

Q3, 2025
International Departures*

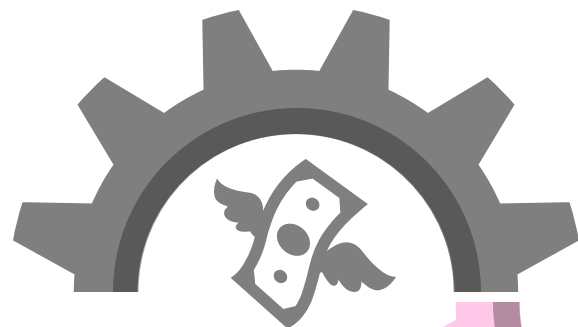
	United States	60.5 M	
	United Kingdom	53.1 M	
	Germany	40.1 M	
	France	27.5 M	
	Spain	26.0 M	
	Italy	25.2 M	
	China	23.8 M	
	India	23.5 M	
	Turkey	18.5 M	
	Netherlands	15.5 M	

DRIVERS TO PURCHASE

Q3 2025

**Good value for
money**
26%

(vs 27% in Q2 2025)



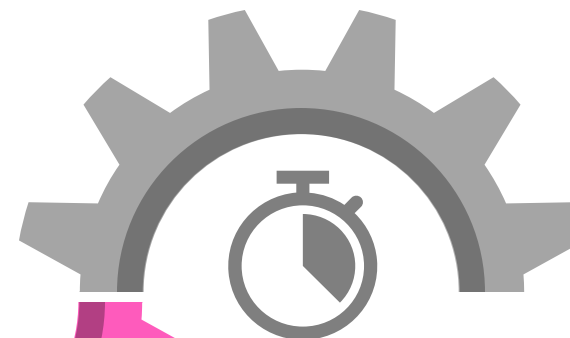
**Suitable as self-
treat**
19%

(vs 17% in Q2 2025)



**Had enough
time to choose**
15%

(vs 15% in Q2 2025)



Convenience
22%

(vs 21% in Q2 2025)



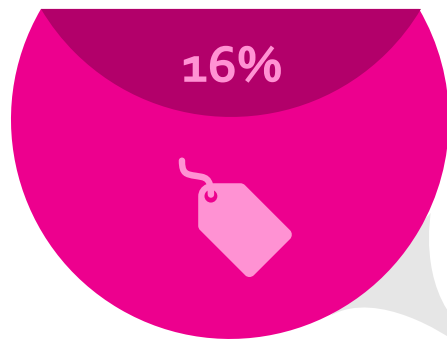
Loyalty to brand
16%

(vs 16% in Q2 2025)



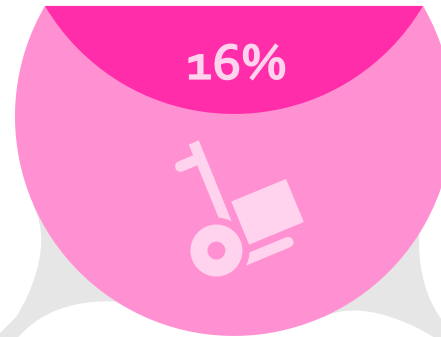
BARRIERS TO PURCHASE

Q3 2025



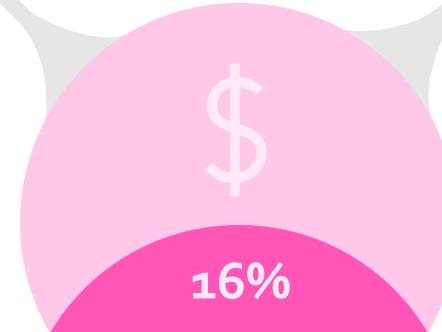
No intention of buying

(vs 17% in Q2 2025)



No motivating discounts

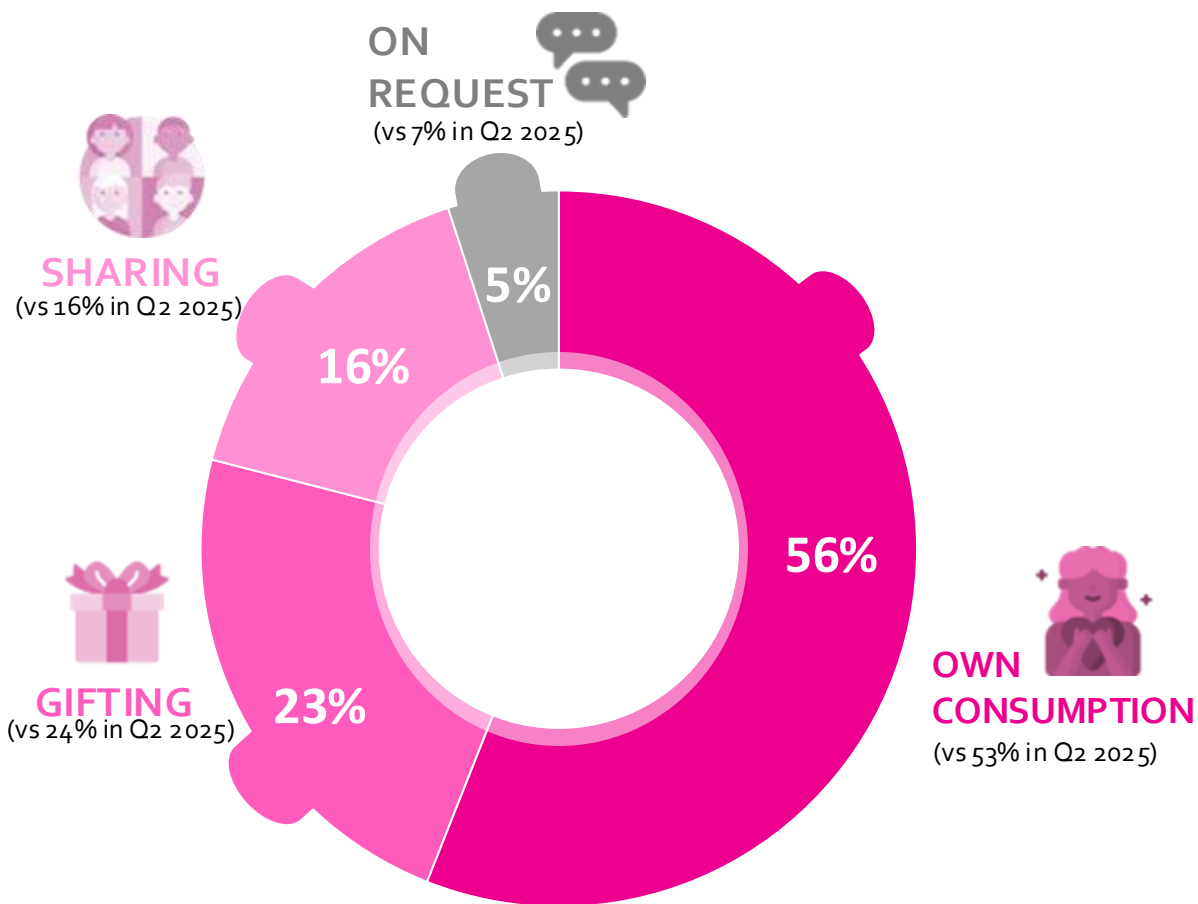
(vs 15% in Q2 2025)



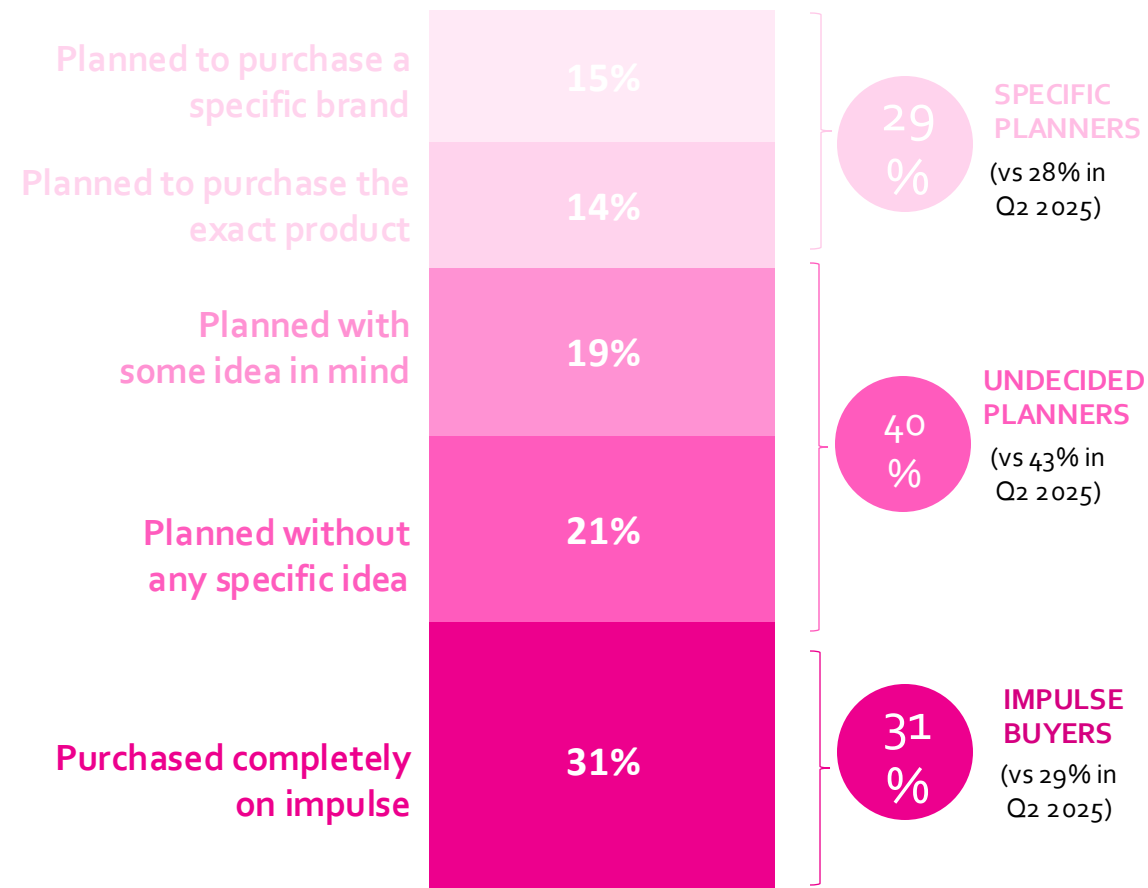
PURPOSE OF PURCHASE & PLANNING LEVELS

Q3 2025

PURPOSE OF PURCHASE



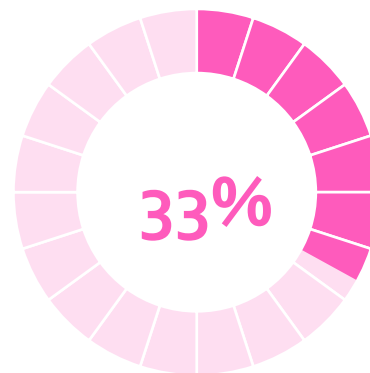
PLANNING LEVELS



MOMENTS OF EXPOSURE TO PRE-STORE TOUCH POINTS

Q3 2025

% OF DF SHOPPERS EXPOSED
TO PRE-SHOPPING
INFORMATION:



(vs 31% in Q2 2025)

Amongst those exposed to touch points



18%

(vs 16% in Q2 2025)

**General internet
search**



15%

(vs 12% in Q2 2025)

**Searched content on
social media**



12%

(vs 10% in Q2 2025)

**Searched info on
shopping sites**



11%

(vs 11% in Q2 2025)

**Searched content on
DF retailer website**



11%

(vs 9% in Q2 2025)

**Searched info on
travel apps**

SALES STAFF INTERACTION & INFLUENCE

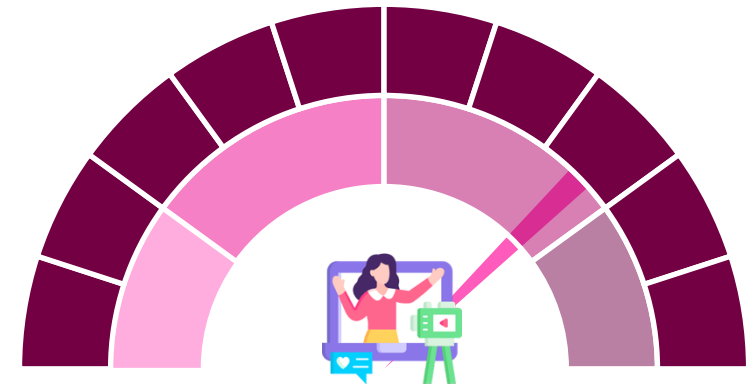
Q3 2025



54%

(vs 54% in Q2 2025)

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



75%

(vs 73% in Q2 2025)

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:** International traffic data and quotas by nationality are provided by IATA exclusively to m1nd-set through B1S and are based on IATA definitions to represent the overall numbers and key nationalities that have been travelling internationally during the relevant period.



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

Q2, 2025	N= 6.498
Q3, 2025	N= 6.787