DFWC QUARTERLY GLOBAL SHOPPING MONITOR

Q3 2026



DFWC
DUTY FREE WORLD COUNCIL
Serving duty free and travel retail worldwide

in partnership with

m1nd-set
RESEARCH BEYOND BORDERS

TOTAL INTERNATIONAL PAX DEPARTURES**

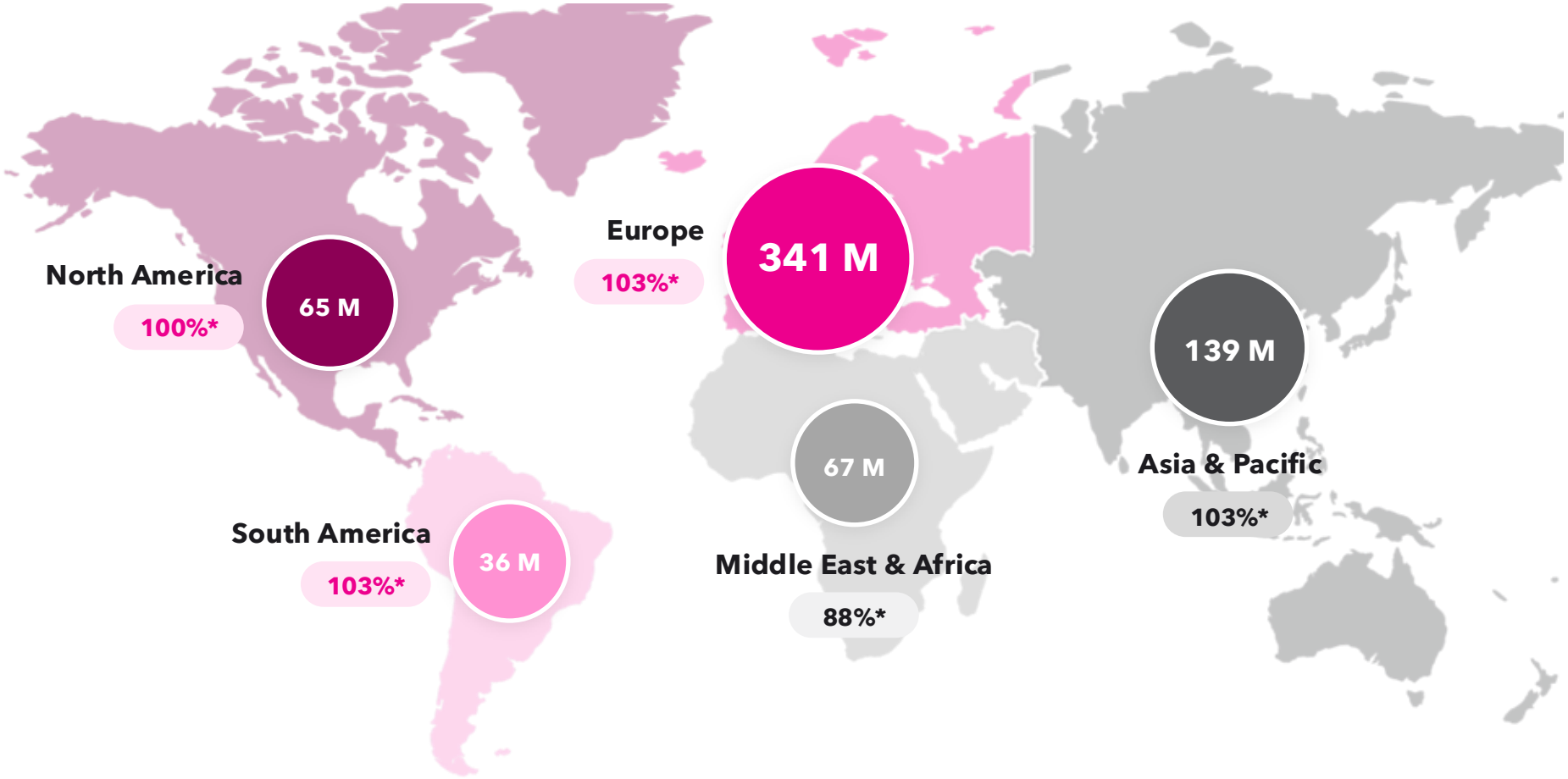
Q3 2026

GLOBAL

649 M

international departures

101% of Q3 2025



*of same period in 2025.

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

Source: m1nd-set B1S / IATA NTR

TOP 10 AIRPORTS & NATIONALITIES

Q3 2026

Top 10 airports

International departures*

01	LHR	London, GB	13.5 M
02	ICN	Seoul, KR	11.6 M
03	AMS	Amsterdam, NL	11.4 M
04	CDG	Paris-De Gaulle, FR	11.1 M
05	SIN	Singapore, SG	10.7 M
06	FRA	Frankfurt, DE	10.0 M
07	DXB	Dubai, AE	9.8 M
08	IST	Istanbul, TR	9.3 M
09	HKG	Hong Kong, HK	9.3 M
10	MAD	Madrid, ES	7.9 M

Top 10 nationalities

International departures*

01	United States	59.9 M
02	United Kingdom	54.5 M
03	Germany	40.9 M
04	France	27.9 M
05	Spain	27.8 M
06	Italy	27.3 M
07	China	23.8 M
08	India	21.6 M
09	Turkey	19.2 M
10	South Korea	15.4 M

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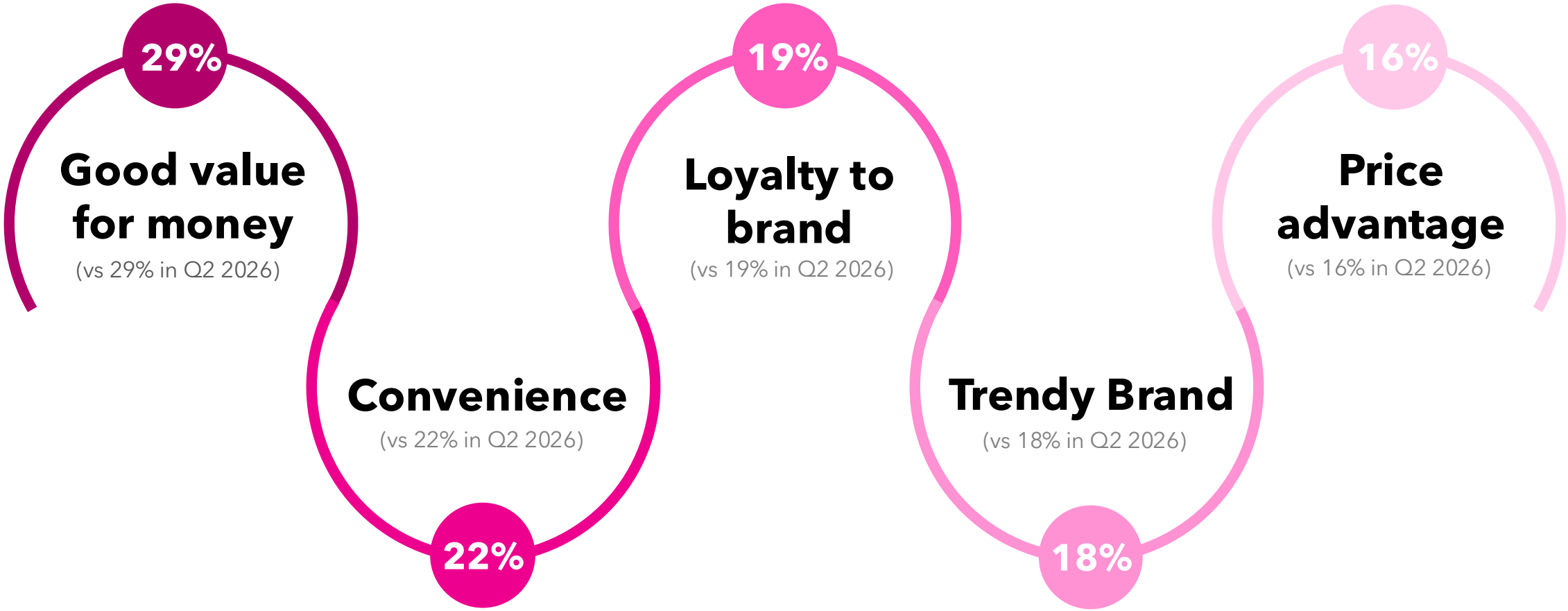
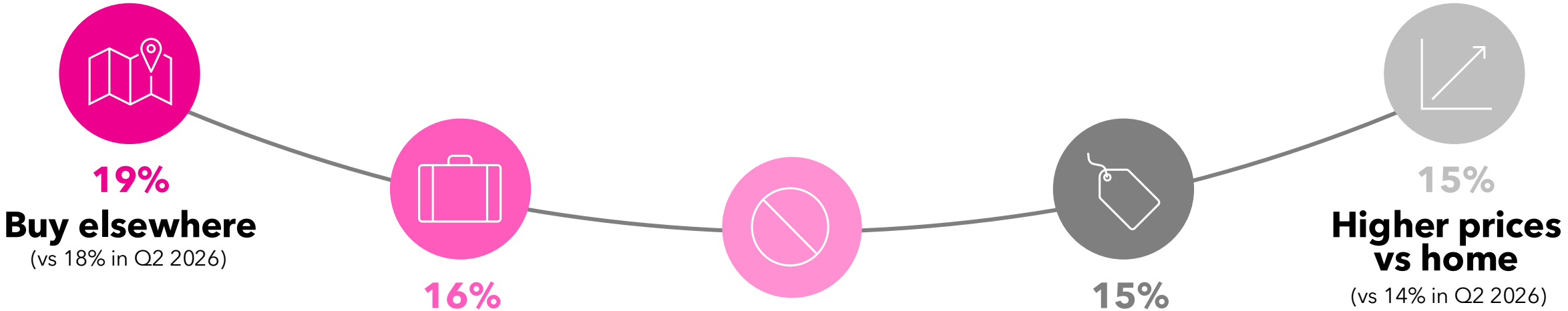
m1nd-set RESEARCH BEYOND BORDERS

DRIVERS TO PURCHASE



BARRIERS TO PURCHASE



19%
Buy elsewhere
(vs 18% in Q2 2026)

16%
Unwilling to carry more
(vs 16% in Q2 2026)

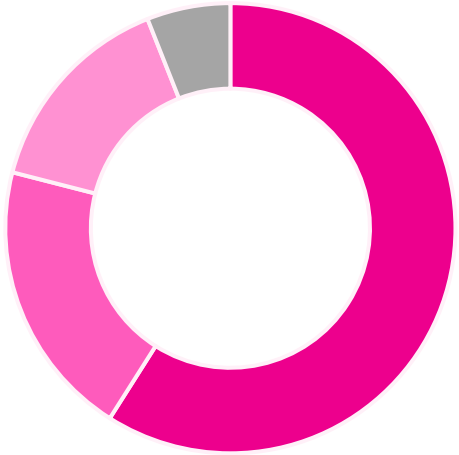
16%
No intention of buying anything
(vs 16% in Q2 2026)

15%
No motivating promotions
(vs 14% in Q2 2026)

15%
Higher prices vs home
(vs 14% in Q2 2026)

PURPOSE OF PURCHASE & PLANNING LEVELS

PURPOSE OF PURCHASE



- **59%** Own consumption
  vs 60% in Q2 2026
- **15%** Sharing
  vs 15% in Q2 2026
- **20%** Gifting
  vs 20% in Q2 2026
- **6%** On request
  vs 6% in Q2 2026

PLANNING LEVELS

21%	24%	22%	18%	15%
Purchased completely on impulse	Planned without any specific idea	Planned with some idea in mind	Planned to buy the exact product	Planned to buy a specific brand

IMPULSE BUYERS

21%

Purchased completely on impulse

vs 22% in Q2 2026

UNDECIDED PLANNERS

46%

Planned with some idea in mind or without any specific idea

vs 46% in Q2 2026

SPECIFIC PLANNERS

33%

Planned to purchase the exact product or a specific brand

vs 32% in Q2 2026

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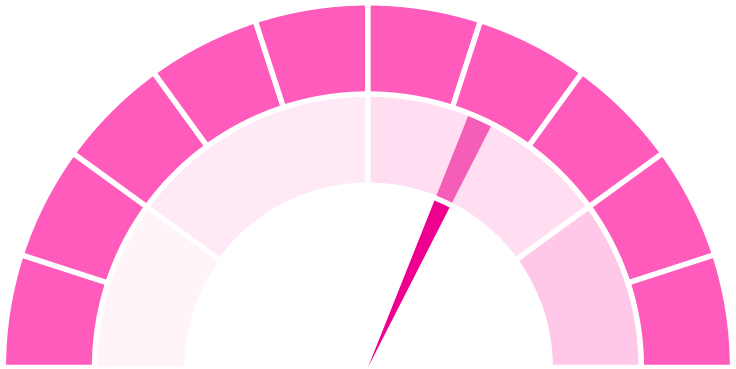
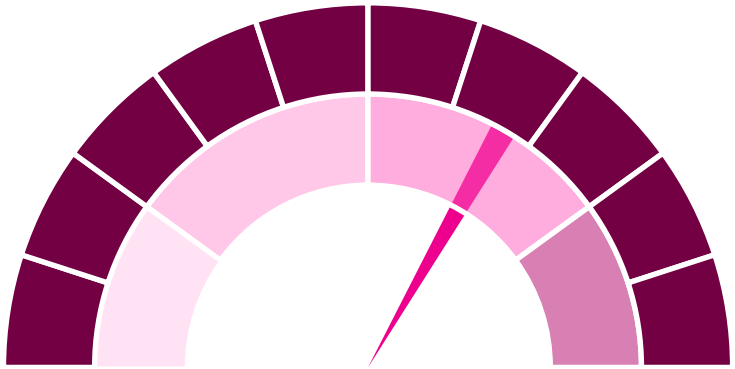
NEW PRODUCTS & TRAVEL RETAIL EXCLUSIVES



63%

(vs 62% in Q2 2026)

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

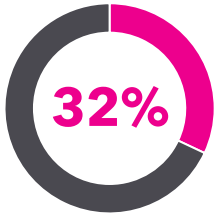


66%

(vs 65% in Q2 2026)

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

MOMENTS OF EXPOSURE TO PRE-STORE TOUCH POINTS



of DF shoppers exposed to pre-shopping information

vs 32% in Q2 2026

Amongst those exposed to touchpoints

21%
General internet search
vs 21% in Q2 2026

16%
Searched content on social media
vs 16% in Q2 2026

16%
Searched content on DF retailer website
vs 16% in Q2 2026

16%
Searched content on travel website
vs 16% in Q2 2026

16%
Airport advertising
vs 15% in Q2 2026

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Source: m1nd-set B1S

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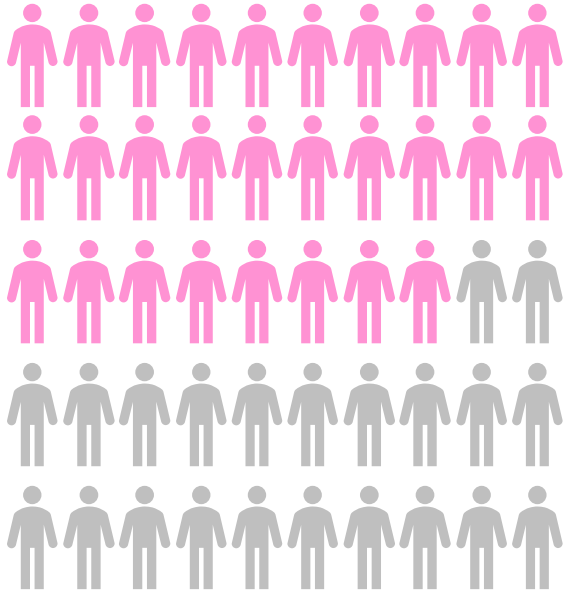
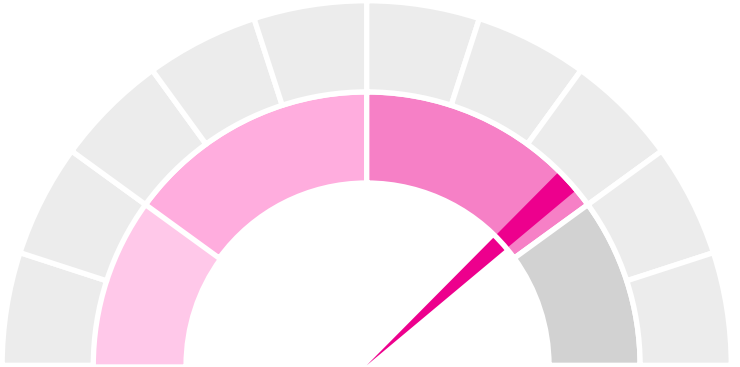
SALES STAFF INTERACTION & INFLUENCE



57%

(vs 56% in Q2 2026)

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



76%

(vs 75% in Q2 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

Q2 2026	**N= 8,941**
Q3 2026	**N= 7,843**

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.

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METHODOLOGY – AIR TRAFFIC

Direct Data Solutions (DDS)

leverages 4 data sources:

- IATA Accredited Agent **BSP**
- **Agency sales**
- arc accredited agency **ASP**
- **Airline direct**

DDS is the **only** database which includes airline direct sales!



COVERAGE

Total Market Estimates (TME)

Additional sources used to estimate the missing historic traffic data in DDS

Such as OAG schedule, IATA WATS/ODS/MIS/RAS, 20+ private & public official resources, etc.



ESTIMATION

BUSINESS 1NTELLIGENCE SERVICE

IATA's Nationality Traffic Report

Available through **m1nd-set's B1S platform**

100%
COVERAGE

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