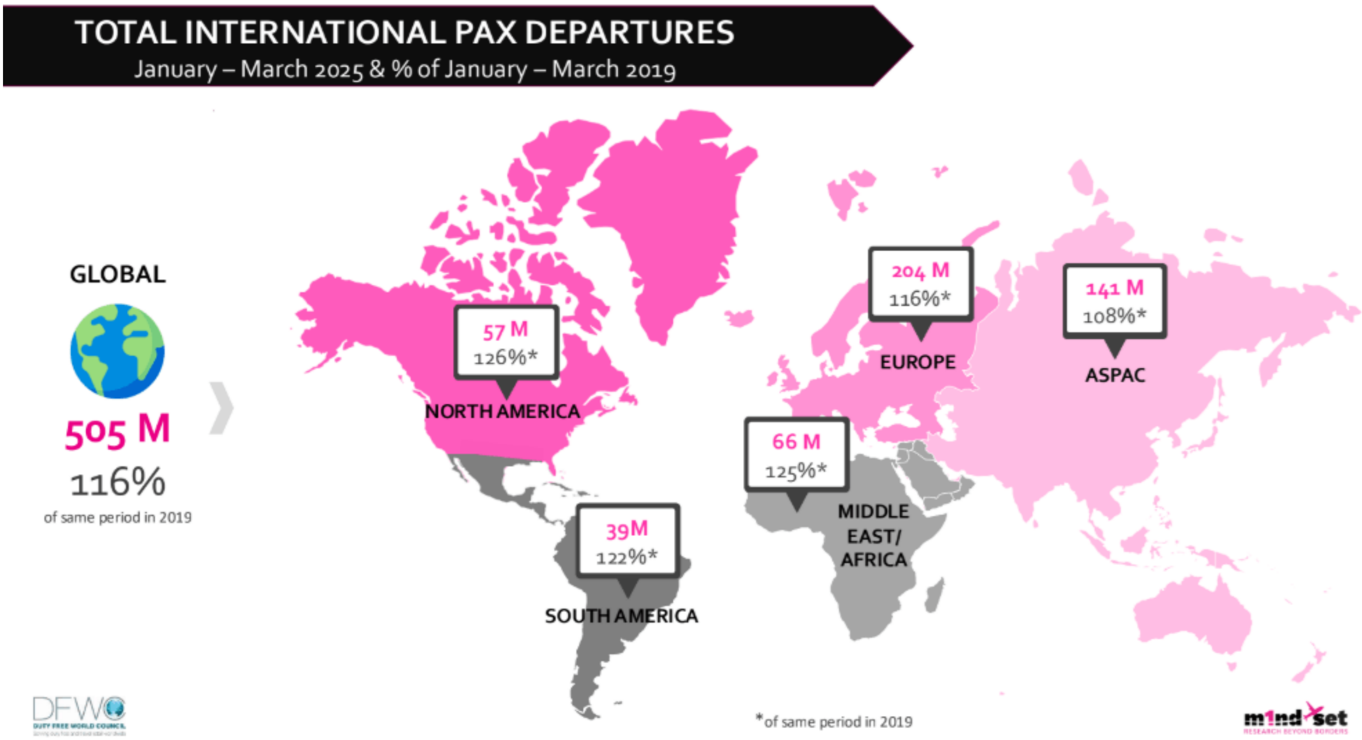
“A welcome milestone”: DFWC reveals passenger traffic rebounds beyond pre-pandemic levels

Global travel retail has reached a milestone, according to the Duty Free World Council (DFWC). Its KPI Monitor for Q1 2025 indicates that international passenger traffic has not only recovered from the impact of COVID-19, it has also surpassed pre-pandemic benchmarks across all world regions, including Asia Pacific, for the first time in over five years.

The quarterly KPI monitor – produced exclusively for the DFWC by Swiss consumer insights agency m1nd-set – reveals a series of shifts in shopper behavior and underscores several strategic priorities for the global duty-free industry. As Sarah Branquinho points out, “travelers are back, but they’re not shopping the same way. Experience is as important as price, and expectations are higher than ever”.

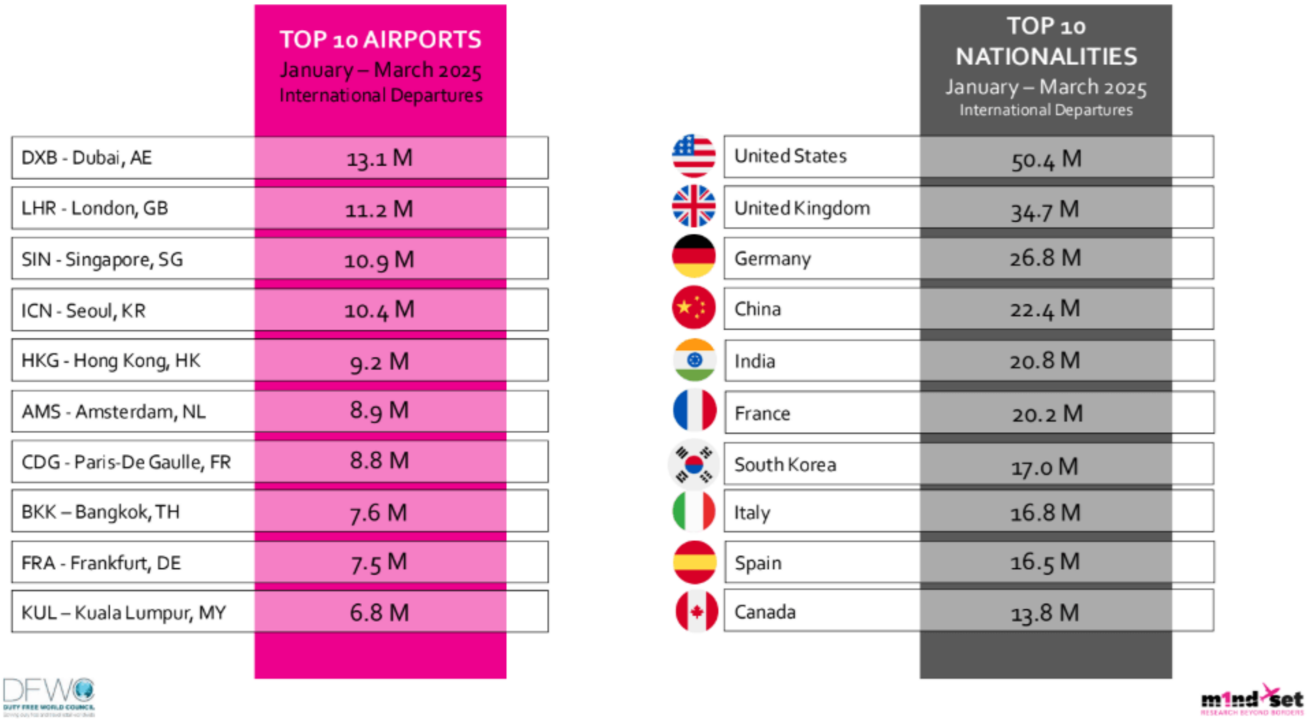
Providing crucial insights into the evolving landscape of the sector, the DFWC Monitor highlights the resurgence of international passenger departures, evolving purchase drivers, and the importance of pre-trip engagement in shaping shopper behavior.



The monitor compares top international passenger departures

The DFWC KPI Monitor reveals that global passenger recovery is now a reality, demonstrating robust growth vs the pre-pandemic era across all world regions. According to DFWC, international passenger departures surged to 505 million in Q1 2025, 116% of Q1 2019 levels. The first quarter of 2025 saw over 200 million international departures in Europe, also 116% of Q1 2019 levels, and traffic in Asia Pacific at more than 140 million departures, 108% compared to the pre-COVID level.

The largest percentage increases can be seen in the Americas with traffic at 126% and 122% of Q1 2019 levels in North and Latin America respectively, while in the Middle East traffic was at 125% of the pre-COVID level.



TOP 10 AIRPORTS January – March 2025 International Departures	
DXB - Dubai, AE	13.1 M
LHR - London, GB	11.2 M
SIN - Singapore, SG	10.9 M
ICN - Seoul, KR	10.4 M
HKG - Hong Kong, HK	9.2 M
AMS - Amsterdam, NL	8.9 M
CDG - Paris-De Gaulle, FR	8.8 M
BKK – Bangkok, TH	7.6 M
FRA - Frankfurt, DE	7.5 M
KUL – Kuala Lumpur, MY	6.8 M

TOP 10 NATIONALITIES January – March 2025 International Departures	
United States	50.4 M
United Kingdom	34.7 M
Germany	26.8 M
China	22.4 M
India	20.8 M
France	20.2 M
South Korea	17.0 M
Italy	16.8 M
Spain	16.5 M
Canada	13.8 M

The Top 10 airports and traveling nationalities for Q1 2025

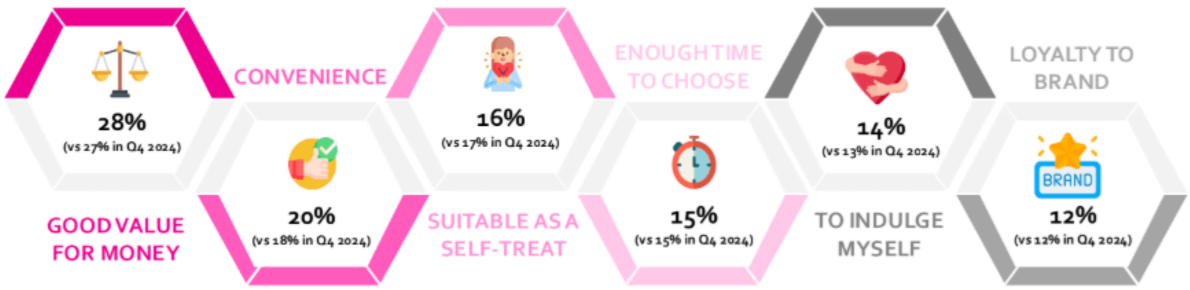
The world’s busiest airports for international departures in Q1 2025, according to the DFWC Monitor, were Dubai International Airport with 13.1 million passengers, London Heathrow at 11.2 million and Singapore Changi with 10.9 million. Seoul Incheon International Airport follows in fourth rank with 10.4 million passengers and Hong Kong International Airport completes the top five, recording 9.2 million passengers in Q1 2025.

The top nationalities contributing to international departures in Q1 2025 were the USA, (50.4 million), the UK (34.7 million) and Germany (26.8 million). China and India complete the top five ranking nationalities with 22.4 million and 20.8 million passengers respectively.

Sarah Branquinho, DFWC President, commented, “The resurgence of international mobility is a welcome milestone not just for airports and airlines, but also for the entire travel ecosystem - retailers, brands and beyond.

“But along with the numbers comes a message: travelers are back, but they’re not shopping the same way. Experience is as important as price, and expectations are higher than ever.”

DRIVERS TO PURCHASE Q1 2025

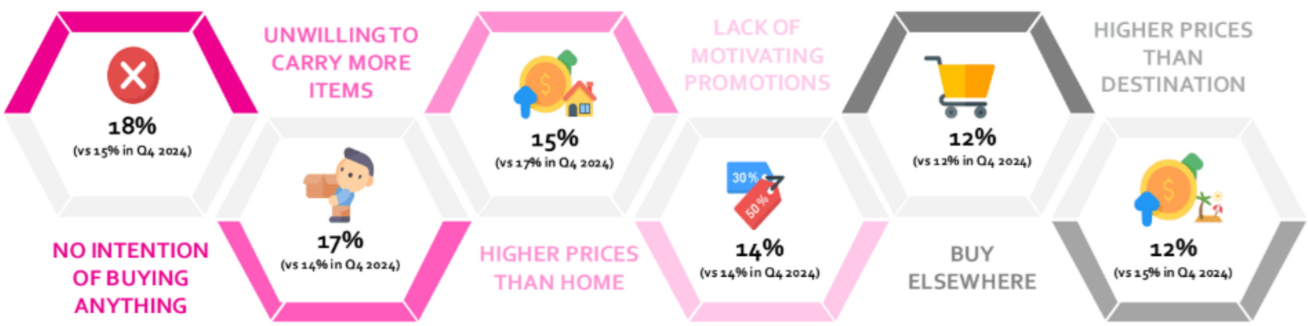


Drivers to purchase during the Q1 period are highlighted

The DFWC KPI Monitor identifies a notable shift in the factors motivating travelers to make purchases in duty-free shops. While 'Good value for money' remains important (28%), its influence has slightly decreased compared to Q4 2024. Significantly, Convenience' remains a strong driver, increasing to 20% in Q1 2025, up from 18% in Q4 2024, indicating that ease and efficiency are becoming increasingly important to shoppers.

Other key purchase drivers include 'Suitable as a self-treat' (16%), 'Enough time to choose' (15%), 'To indulge myself' (14%) and 'Loyalty to brand' (12%).

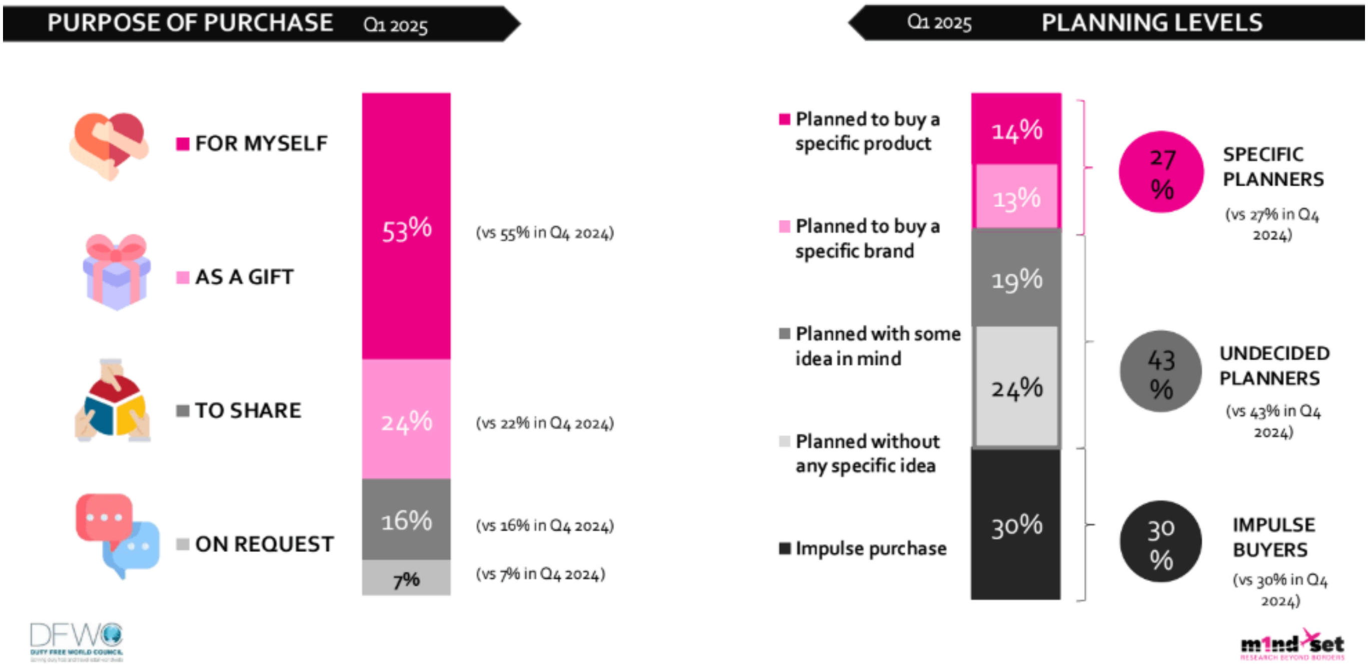
BARRIERS TO PURCHASE Q1 2025



Barriers to purchase are also considered

While traffic is up, barriers to purchase remain, with apathy and unwillingness on the increase. The most cited reasons for not buying include ‘No intention to buy anything’ (18%) and ‘Unwilling to carry more items’ (17%) in first and second place. Encouragingly, price perception is improving compared to previous quarters.

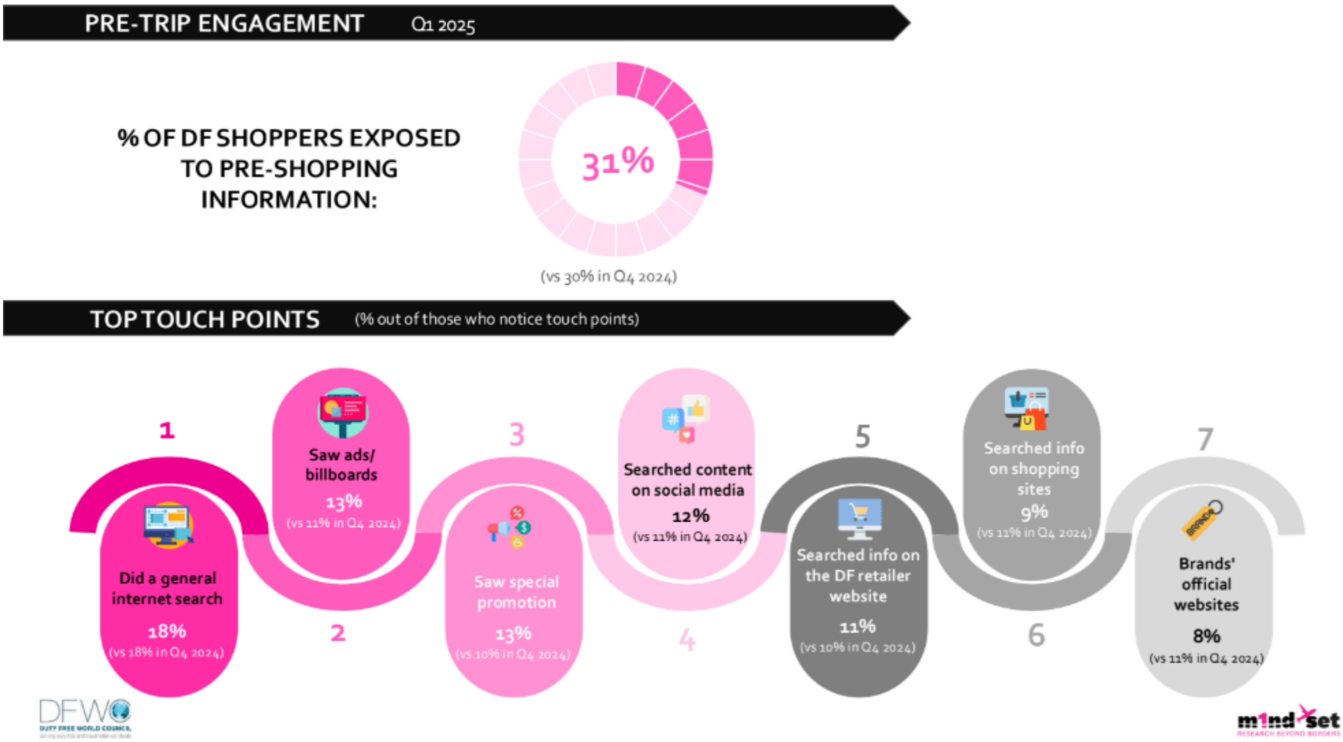
Price perception compared to home ranks third as a barrier to purchase at 15%, down from 17% in the previous quarter and prices compared to destination as a barrier, down from 15% in Q4 2024, to 12%. The DFWC KPI Monitor underlines the need for more effective, value-driven promotions tailored to the specific needs and preferences of travelers. The ‘Lack of motivating promotions’ (14%), and ‘Buying elsewhere’ (12%) are other commonly cited reasons for not purchasing.



Insights on how travelers plan their duty free shopping

The DFWC KPI Monitor also provides insights into how travelers plan duty-free shopping, revealing no change in their planned vs impulse behavior from the previous quarter, however. 27% of shoppers are ‘Specific Planners’ who know exactly what they want to buy; 43% are ‘Undecided Planners’ who have some ideas but remain open to suggestions from the sales staff, and 30% are ‘Impulse Buyers’ who make unplanned purchases on the spur of the moment, encouraged by in-store merchandising, promotions or the sales staff.

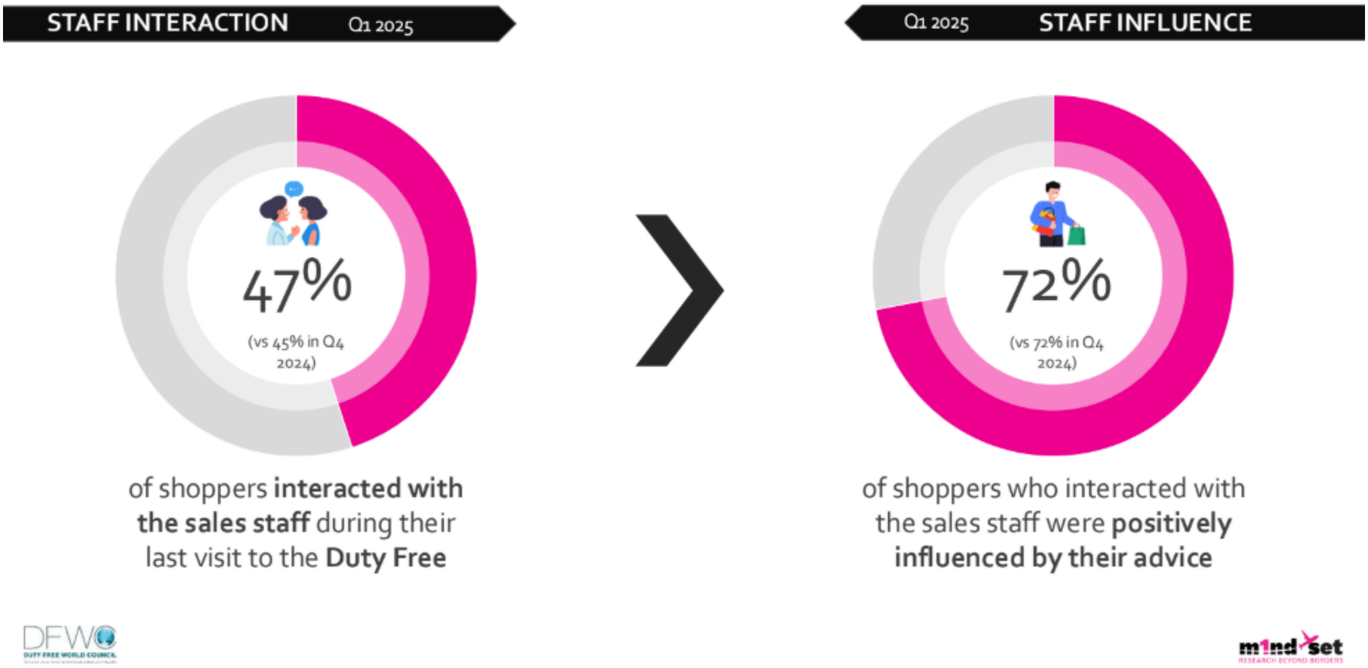
According to m1nd-set, the planning and impulse shopping behavior indicates a dual opportunity. Peter Mohn, Owner & CEO of m1nd-set, explained, “There is a clear need to inspire purchases early in the journey via airline websites or booking platforms and, at the same time, to stimulate spontaneous conversion in-store through standout displays and activations.”



According to Mohn, only 18% of travelers conducted general online searches for duty-free offers before their trip, and just 11% visited retailer websites. “Social media had an influence on 12% of shoppers, and the same percentage (13%) noticed either a special promotion before travel or an advert or billboard,” he added.

Brand websites and other shopping-related websites are “the least common sources for information with only 8% and 9% of shoppers seeking information on the duty-free shopping offer in these environments”.

“This underlines the untapped potential of pre-travel digital engagement, and the importance of building stronger omnichannel ecosystems to capture travelers’ attention before they reach the airport,” Mohn said.



Among the most positive findings in the Q1 DFWC KPI Monitor is the crucial role of sales staff in influencing shopper behavior. Nearly half of shoppers (47%) engaged with staff during their last duty-free visit, up from 45% during the previous quarter, and 72% felt positively influenced by the interaction.

“As differentiation through product alone becomes harder, the ability of staff to engage travelers personally, culturally, and emotionally is what will drive sales and brand loyalty. Investments in training, immersive product storytelling, and service empathy are not just desirable, they’re essential,” Branquinho concluded.