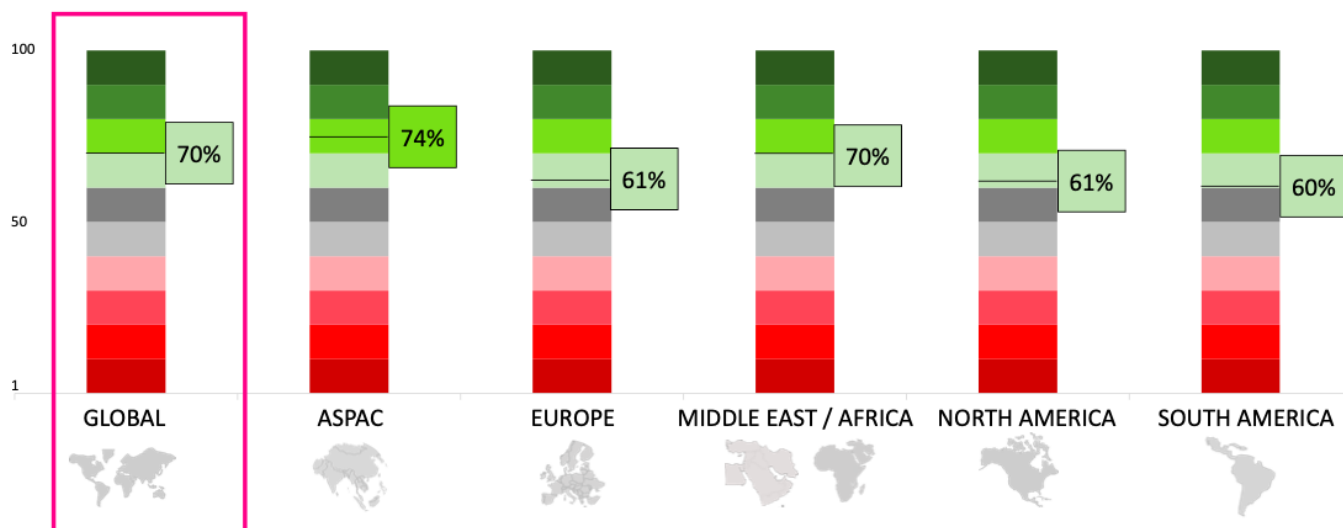


# Variety and value win out as key satisfaction drivers in new DFWC Monitor

## CUSTOMER SATISFACTION INDEX

Computed by aggregating the satisfaction scores on all aspects of the DF visit, and weighting these in function of their impact on the overall satisfaction



An infographic from the Duty Free World Council's KPI Monitor for Q4 2019

While value remains one of the key purchase drivers for global shoppers in travel retail, variety ranks highest for shopper satisfaction. That's according to the latest Duty Free World Council (DFWC) KPI Monitor for Q4 2019.

Almost half (48%) of shoppers say that the variety of products in duty free shops makes them "a great place for shopping", 2% more than in Q3 2019.

The novelty aspect of duty free shopping is also a significant contributing factor to shopper satisfaction, with 47% stating duty free shops are great for discovering new brands, up 3% on the previous quarter.

The Monitor, which is produced for the DFWC by Swiss research agency m1nd-set, is compiled from over 4,000 interviews with shoppers globally. Field work was conducted in December for the fourth quarter of 2019.

Given the seasonal/festive shopping behavior during this period, gifting emerges as one of the key satisfaction drivers among shoppers in duty free stores.

Gifting as a satisfaction driver rose 2 points on the previous quarter, from 39% to 41%; it also emerges as the second-highest purchase driver for global shoppers in Q4 with 30% of shoppers citing it as a key motivation. The top purchase driver is price/quality ratio, quoted by 31% of duty free shoppers.

The global average for customer satisfaction remained stable since the previous quarter in 2019, at 70%. Both the Middle East/Africa and Asia Pacific regions saw moderate increases of 2% and 1%,

respectively, with Asia Pacific posting an above average score for overall customer satisfaction, at 74%. Europe and the Americas show below average scores for overall customer satisfaction at 60% and 61%.

In terms of traffic growth, Europe posted the strongest year-on-year gains, +4%, followed by Asia Pacific with 3.1% growth. Both grew at rates above the global average of 2.6%. Traffic in the Middle East/Africa region was still positive, albeit less dynamic, at + 0.7%, while North America recorded negative growth at -0.1% and South America -2% compared to Q4 2018, according to IATA, m1nd-set's air traffic data partner.

DFWC President Sarah Branquinho underlined the importance of both variety and novelty in the product offer to keep passengers engaged in duty free shops.

"While price is often top of mind for many customers in duty free, we see from the DFWC KPI Monitor that new products and differentiation – goods that are different to those duty free shoppers can find back home – are essential to creating shopper satisfaction. The latest Monitor also shows that a strong selection of unique products that are suitable for gifting, targeted promotions and new product launches all help increase shopper satisfaction levels – and consequently, spend levels."

Peter Mohn, Owner and CEO at m1nd-set, added: "It's important that shoppers are constantly aware of the promotions and the value offering in the duty free shops. These criteria are the key purchase drivers, but more importantly, the lack of attractive promotions, and prices that are higher than shoppers find back home also constitute the key barriers to shopping in duty free. It's necessary to maintain a positive price perception therefore as well as offering a novel, unique and wide assortment."

Further information about the Monitor is available from m1nd-set at [info@m1nd-set.com](mailto:info@m1nd-set.com)