

DFWC Q2 KPI Monitor highlights positive shift in staff engagement trends

The DFWC quarterly KPI Monitor, produced exclusively for the Duty Free World Council by Swiss travel and travel retail research agency mind-set, highlights a positive shift in staff engagement trends in the second quarter of 2025, with the proportion of global shoppers who interacted with sales staff rising to 53% in Q2, up from 47% in the previous quarter.

In addition to the increased frequency of interaction, the quality of these engagements also improved slightly, with 73% of shoppers reporting that the interaction had a positive influence on their shopping experience, up from 72% in Q1.

Apart from the increase in staff engagement, the DFWC Q2 KPI Monitor shows minimal variation among global shoppers across most of the other criteria analyzed by mind-set.

The top purchase drivers remain largely consistent in Q2, with “good value for money” (27%), “convenience” (21%), and “suitability as a self-treat” (17%) retaining the top three positions. “Brand loyalty” (16%) rises to fourth place, while “having enough time to choose” (15%) slips to fifth.

The top five purchase barriers among global shoppers remain unchanged, though the order has shifted. “Higher prices than at home,” “no intention to buy,” and “unwillingness to carry more items” are tied as the leading barriers at 17% each. “Lack of motivating discounts” (15%) and a preference to “buy elsewhere” (13%) complete the top five.

Over half (53%) of global travel retail shoppers continued to buy for themselves, in Q2 2025, followed by 24% purchasing for gifting, 16% for sharing, and 7% buying upon request.

Purchase planning and impulse behavior showed only slight variation between the two quarters. In Q2, 71% of shoppers planned their purchase, with a modest increase in specific planners from 27% to 28%. On the other hand, impulse purchases declined slightly from 30% to 29%.

The proportion of global shoppers noticing pre-shopping touchpoints remains stable at 31%, reports the DFWC Monitor. General internet search continues to be the most common touchpoint, cited by 18% of shoppers. Seeing a special promotion ranks second at 13%, followed by proactive searches, either on social media or Duty Free retailers’ websites, both at 12%. Billboard advertising is the fifth most frequently mentioned touchpoint, noted by 11% of shoppers in Q2.

“The Q2 2025 KPI Monitor confirms encouraging signs for our industry, particularly the marked improvement in staff engagement, both in frequency and quality. With over half of global shoppers now interacting with sales staff, and the majority reporting a positive impact, this reinforces the value of human connection in the travel retail experience,” commented DFWC President, Sarah Branquinho.

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Michael Payne to step back from key role at IAADFS

The International Association of Airport and Duty Free Stores (IAADFS) has announced that Michael Payne will be stepping back from his role as President and CEO of IAADFS.

“Michael will continue to serve as a chief advisor to the Board on matters relating to advocacy, governance and program content, but will continue to move away from the day-to-day operational activities dealing with membership services, budget items and related areas,” said IAADFS Chairman Rene Riedi.

“As we go through some of our scheduled strategic changes and redefining our scope as an organization, we want to be able to take advantage of his knowledge and relationships and are pleased to have his continued involvement and support,” added Riedi.

Payne will be actively participating in Cannes to focus on his areas of responsibility and promote the next Summit of the Americas.

IAADFS transition period

“I feel this is a really good solution as we go through this transition period,” said Michael Payne.

“This conversation started back before COVID, which of course changed everything, and it clearly wasn’t a good time to make any major staff adjustments. We now have an energized Board with a number of new members from both the supplier and operator side who have an appreciation and understanding of what changes need to be made to better serve our members and reflect the rapidly changing nature of our industry. It’s a perfect time for new leadership and new thinking.”

“I’m grateful for the opportunity to stay involved but recognize it’s time to welcome a fresh approach,” he added.

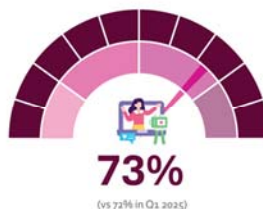
Steven Antolick, who was promoted in 2023 to the Executive Director position, will continue to manage the operational requirements for the association, including membership development, budgets and Summit meeting requirements, according to Riedi.

“This activity will be handled through our management firm contract with Smithbucklin where Steven is employed. Steven’s knowledge of and history with IAADFS will be extremely valuable as we move forward,” concluded Riedi.

SALES STAFF INTERACTION & INFLUENCE Q2 2025



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



of shoppers who interacted with the sales staff were positively influenced by their advice

DFWC 2025 Q2 KPI Monitor: International travel still robust

The DFWC KPI quarterly monitor reports that the robust growth in global air traffic tracked in the previous quarter continued in Q2 this year. It reports 583 million international flights globally, 113% of the level in the same period in 2019. This is a significant increase, up 15%, on global traffic in the first quarter of 2025.

International traffic in Europe surged by just under 40% in Q2 versus Q1 2025, to 284 million flights, also 15% higher than the same period in 2019.

In the Middle East & Africa, international traffic was 26% higher than the same period pre-Covid 2019, at 68 million international flights, but only a marginal 3% increase on Q1 2025 traffic.

North America also posted robust growth vs Q2 2019 with a 21% increase, at 65 million international departures, representing 14% growth on Q1 this year.

South America recorded a 15% increase on the same period in 2019 but a 13% drop on Q1 traffic, with 34 million international passengers.

Asia Pacific proved to be the least dynamic region in Q2 compared to the same period in 2019, posting only 1% growth to 132 million international departures. However, this was a 6% decline on Q1 2025.

The top 10 nationalities for international departures in Q2 2025 show a slight reshuffle from the

rankings for the first quarter, and the emergence of Turkey in tenth position. The top three nationalities remain the same, with the U.S., UK and Germany, each posting 19%, 42% and 35% growth respectively vs Q1. France moves from 6th to 4th position, edging China into 6th place in Q2, behind India, which remains stable in 5th position. Spain, China, Italy, South Korea and Turkey complete the top ten nationality rankings.

With the exception of China and South Korea, which both saw a decline in international departures compared to Q1, all other top 10 nationalities experienced growth on Q1 for international departures, the DFWC reports.

DFWC Q2 KPI Monitor

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“However, as most shopper behaviors and purchase motivations remain relatively stable, it is clear that more needs to be done to convert traffic growth into sales,” Branquinho continues. “We encourage retailers and brands to invest further in staff training and to enhance promotional visibility, especially through digital and in-store channels, to overcome persistent purchase barriers and better capture the attention of today’s travel retail consumers.”

Branquinho adds that the quarterly DFWC KPI Monitor is possible thanks to their partnership with m1nd-set.

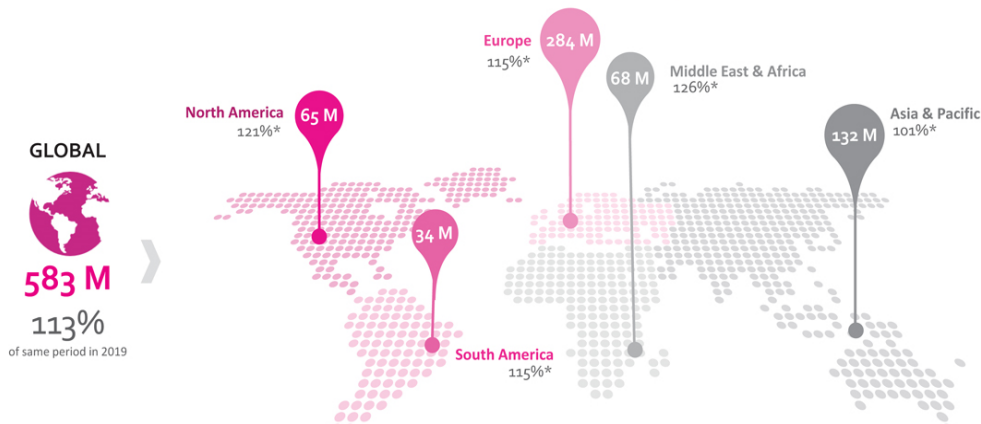
“By capturing quarterly feedback across all major nationalities, regions, and product categories, and changes in flight and passenger traffic the DFWC monitor provides the travel retail industry with timely, in-depth insights that reflect real-world traveler behavior and seasonal trends,” sah says.

m1nd-set CEO & owner Peter Mohn added: “The B1S tracking survey has been the industry’s most consistent and comprehensive source of shopper insights since its launch in 2016, with over 200,000 international travel retail shoppers surveyed to date. B1S compiles data using nationality quotas that are defined based on international traffic data provided by IATA exclusively to m1nd-set, that is representative of the key nationalities that have been travelling internationally during the relevant period of time.”

“Even through the disruption of Covid-19 we were able to maintain data quality and representativeness thanks to our exclusive partnership with IATA and our global traveler and shopper panel. We are delighted to service so many industry partners with our shopper analysis and the DFWC through the quarterly monitor,” Mohn concluded.

TOTAL INTERNATIONAL PAX DEPARTURES

Q2, 2025



TOP 10 AIRPORTS Q2, 2025 International Departures		TOP 10 NATIONALITIES Q2, 2025 International Departures	
LHR - London, GB	12.9 M	United States	59.9 M
DXB - Dubai, AE	12.2 M	United Kingdom	49.1 M
SIN - Singapore, SG	10.6 M	Germany	36.1 M
AMS - Amsterdam, NL	10.5 M	France	25.2 M
CDG - Paris-De Gaulle, FR	10.3 M	India	23.5 M
ICN - Seoul, KR	10.2 M	Spain	22.2 M
FRA - Frankfurt, DE	9.1 M	China	20.9 M
HKG - Hong Kong, HK	8.9 M	Italy	20.8 M
IST - Istanbul, TR	7.7 M	South Korea	14.9 M
MAD - Madrid, ES	7.2 M	Turkey	14.1 M

Dior brings 'Dioriviera' summer experience to Montréal–Trudeau Airport

Dior and ARI North America are inviting travelers to a bohemian -chic summer experience at Montréal–Trudeau Airport International Terminal. The 2025 “Dioriviera” installation features desert-inspired decor, including a towering palm tree and life-size cactus, creating a memorable and Instagrammable backdrop throughout the month of August.

The Dior podium offers a curated selection of fragrances, makeup, and skincare, embodying the colorful and joyful Dior Summer lifestyle.

Fragrance highlights include Miss Dior and J'adore. For men, the experience features the iconic Sauvage and the sophisticated Dior Homme.



The stunning 2025 “Dioriviera” installation at Montréal–Trudeau International Airport features desert-inspired decor, with a towering palm tree and life-size cactus, throughout the month of August.

The limited-edition Dioriviera makeup collection, created by Dior Makeup Creative and Image Director Peter Philips, features vibrant, sun-kissed shades perfect for summer. Travelers can discover three new, limited-edition shades of Dior Addict Lip Glow: 098 Lemon Glow, 097 Splash, and 096 Pink Pop.

Skincare focuses on the multi-use Dior Le Baume, and Dior Solar, the House's sun protection collection.

Beyond shopping, the Dioriviera experience offers a range of services: personalized summer beauty consultations for tailored skincare, fragrance, and makeup advice; a curated summer playlist station; a dedicated selfie area; and exclusive Dioriviera summer postcards.

Travelers can share their Dioriviera moments at #Dioriviera-Montreal and visit the Dior podium at Montréal–Trudeau Airport International Terminal throughout August.



Indigenous-owned company Atikuss Canada offers a range of premium traditional and contemporary accessories handmade by First Nations craftswomen, from teddy bears and dreamcatchers to handmade moccasins.

Atikuss Canada lands at Montréal Duty Free, celebrating and showcasing Indigenous craft

Montréal Duty Free has unveiled the new range of Indigenous products from Atikuss Canada in-store, marking a first foray into travel retail by the company. This latest listing is part of an on-going commitment to supporting indigenous communities, both by ARI and YUL Montréal–Trudeau International Airport.

Atikuss offers a range of premium traditional and contemporary accessories handmade by First Nations craftswomen. The brand's mission is to support Indigenous artisanship, honoring tradition while also promoting the social economy and helping to advance cultural reconciliation through fair and responsible trade.

The collection at Montréal Duty Free showcases the best of traditional craftsmanship and reflects the rich Indigenous Canadian culture, from handcrafted leather bags to dreamcatchers, luxury handmade teddy bears to mittens and more.

ARI says that this new partnership by Montréal Duty Free marks a step beyond supporting local producers. The initiative carries huge cultural significance by supporting Canada's indigenous First Nations communities and offering passengers a chance to experience unique Canadian heritage.

Katherine Sullivan, ARI North America's Head of Marketing said, “We are proud to welcome Atikuss

Canada to Montréal Duty Free, with a range of premium gifts and accessories that we know our passengers will love.

“It's a signal of our commitment to promoting local business, supporting Indigenous heritage, and to offering passengers a truly unique experience when they shop in our stores. Sense of place doesn't come much more authentic than this!”

“This is truly a dream come true for our team. Being present in such an iconic location allows us to share our story, our values, and our identity with travelers from all over the world,” said Josée Shushei Leblanc, founder of Atikuss Canada.

Hudson wins 12-year retail contract at San José International Airport

Avolta's Hudson brand has won a 12-year contract to bring six new retail concepts to San José Mineta International Airport that will deliver a diverse mix of travel essentials, specialty retail, and hybrid concepts and collectively create a distinct sense of place.

The shops are part of SJC's \$16.9-million retail transformation.

Beginning in early 2026, Hudson will open the six locations across more than 6,700 Sq. feet of concessions space in Terminal A and Terminal B at SJC, which welcomed nearly 12 million passengers in 2024 and will see an influx of travelers in 2026 when the region hosts Super Bowl LX, the NCAA men's basketball tournament, and FIFA World Cup.

The stores will offer seamless, technology-driven solutions. Travelers will also be able to enjoy all the benefits of the Club Avolta loyalty program.

Diamonds International announces fleetwide retail partnership with Oceania Cruises and Regent Seven Seas Cruises



Some of the new Diamonds International retail boutiques onboard Oceania and Regent Seven Seas cruise ships.

Diamonds International has announced a new multi-year contract as the retail partner across the entire fleets of Oceania Cruises and Regent Seven Seas Cruises. This agreement includes current fleets, and upcoming newbuilds such as *Oceania Allura* launching in July 2025 and *Seven Seas Prestige* debuting in December 2026.

With the announcement, Diamonds International is stepping into a new chapter. Known for its fine jewelry and timepieces, the retailer is expanding the onboard shopping experience to include beauty, fashion, and lifestyle essentials, all under the Diamonds International brand.

“This growth sets a new standard for luxury shopping at sea for

guests of both Oceania Cruises and Regent Seven Seas Cruises,” says the company in its official announcement.

“This partnership means a lot to us,” said Albert Gad, CEO of Diamonds International. “We’re proud to keep growing with Oceania Cruises and Regent Seven Seas Cruises. Our team is excited to bring our collections to their guests around the world, on every ship, now and in the future. It’s an honor to be part of their guest journey and to help shape what luxury shopping looks like at sea.”

Diamonds International is debuting several first-at-sea brands within its curated collection which it says blends global luxury with local inspiration.

Guests sailing with Oceania Cruises will find Fair Harbor, which turns ocean plastics into stylish coastal clothing, and Alustre, a modern lifestyle brand with a clean, refined look. *Oceania Allura* will also feature Breitling timepieces.

“We are excited to bring a new level of shopping to guests on board. This partnership lets us offer quality and innovation in a way that truly connects with today’s luxury traveler,” said Elchonon Shagalov, Chief Commercial Officer of Diamonds International.

At Regent Seven Seas Cruises, Diamonds International is bringing an expanded collection of tailored fine jewelry, timepieces, and lifestyle brands.

“We are thrilled to be partnering with Diamonds International and believe that our guests will relish the opportunity to browse and buy from the remarkable array of brands on offer as they sail the globe on our small luxurious ships,” said Jason Montague, Chief Luxury Officer of Oceania Cruises and Regent Seven Seas Cruises.

Azamara Cruises appoints former Starboard executive Lisa Kauffman as Chief Marketing Officer

Azamara Cruises has appointed Lisa Kauffman as Chief Marketing Officer. Kauffman most recently served as Chief Marketing and Experience Officer at Starboard Group, where she led global B2B as well as B2C marketing strategies, digital innovation, integrated communications, and Retailtainment.

In her new role, Kauffman will oversee marketing and communications, including e-commerce, product, trade, brand, social engagement, media, public relations, guest loyalty and internal communications.

Prior to her tenure at Starboard, Kauffman held executive marketing roles at Perry Ellis International, Celebrity Cruises, Macy’s Florida, and The Walt Disney Company.

Award-winning Azamara Cruises is a small-ship cruise line and leader in Destination Immersion experiences.



Harding+ unveils exclusive Citizen watch launch with P&O Cruises

Harding+ and Citizen have launched the Citizen x P&O Cruises Tsuyosa Special Edition watch available exclusively onboard selected P&O Cruises ships from August 2025.

Crafted as part of Citizen’s popular Tsuyosa Automatic collection, the limited-edition timepiece has been designed in close collaboration with P&O Cruises. The watch features the cruise line’s signature sunray blue dial and logo, blending sport-luxe aesthetics with a uniquely maritime identity.

The watch features a 40mm stainless steel case, automatic movement, and anti-reflective sapphire crystal, with a transparent case back and 50m water resistance. Each watch is presented in a bespoke collector’s gift box with a branded plaque, for souvenir or gift appeal.

Launching in August, the Tsuyosa special edition timepiece represents Harding+’s ongoing commitment to guest-first thinking and premium brand partnerships, says the company. Supported by striking visual merchandising and dedicated displays across selected P&O Cruises ships, the launch delivers an elevated retail moment at sea.



The Citizen x P&O Cruises Tsuyosa Special Edition watch display onboard P&O’s *Iona*.

Starboard Resort expands land-based retail operations at Westgate Vacation Villas Resort in Central Florida



Starboard Resort has opened Crafted by Starboard boutique at the Westgate Vacation Villas Resort in Kissimmee, Florida.

Starboard Resort, Starboard Group's land-based vacation retail division, has opened *Crafted by Starboard* at Westgate Vacation Villas Resort in Kissimmee, Florida. Described as a dynamic new retail concept designed with families in mind, the boutique blends personalization, expertly curated assortments, and immersive retail experiences in a single, shopping destination.

Kissimmee, Florida is the location of the Orlando area's theme parks.

"This launch marks another major milestone in our Starboard Resort growth strategy and the latest expansion of our strong partnership with Westgate," said Lisa Bauer, President and CEO, Starboard Group. "Conceptualized and created with personalization at the center, *Crafted by Starboard* combines thoughtful curation and unique, immersive retail experiences to ultimately redefine vacation shopping."

The Personalization Destination

The name *Crafted by Starboard* is a nod to the creativity behind the concept and the personalization offerings of the retail experience, says Starboard. The shop features the first-ever dedicated personalization station in a Westgate resort, where guests can transform an array of items into one-of-a-kind keepsakes.

Customization offerings include embroidery of apparel and accessories, such as tees, hoodies, hats, handbags, backpacks and plush toys, and personalization of tumblers from The Darling Effect. Jewelry customization options include engraving by Metal & Stone, charm stations by Jet Set Candy and Canvas Style, and custom-length chain jewelry from Inch of Gold.

"We're constantly innovating to create memorable experiences that offer convenience, connection and fun for our guests of all ages," said Jared Saft, Chief Business & Strategy Officer at Westgate Resorts. "By partnering with Starboard Resort, we're able to enhance the vacation experience for our guests with a range of unforgettable shopping experiences in a single, on-site destination. *Crafted by Starboard* gives our guests new ways to discover products and brands, connect through creative retail experiences, and customize items to make them their own."

The opening of *Crafted by Starboard*, in the resort's lobby, caps off an extensive series of renovations and new attractions at Westgate's largest resort. The sleek, modern lobby is also home to the new \$10 million Mystery Fun House Arcade Experience, Viva coffee shop, and Sid's American Bistro restaurant.

Tailored for families and kids

Crafted by Starboard offers exclusive assortments and fun shopping experiences curated just for kids. The shop features plush toys and dolls, customizable jewelry, accessories and more from brands including Jellycat, Squishmallows, Charm It and Mon Ami as well as a wide range of artisan, classic and internationally inspired sweets from Candy Club.

"*Crafted by Starboard* is designed to cater to modern families, offering specially curated assortments for vacationers of all ages along with unmatched customization options and fun, engaging retail experiences," said Stacy Shaw, Senior Vice President, Luxury & Resorts, Starboard Group. "We've drawn on our strong network of global sourcing partnerships and our curation expertise to craft an unforgettable array of products, brands and

immersive experiences that will delight Westgate Vacation Villas Resort guests and enhance their stay."

Lifestyle and Leisure assortments

Crafted by Starboard also offers apparel, sportswear, swimwear, accessories and lifestyle goods from brands such as America & Beyond, Eat My Socks, NYS Collection sunglasses, Shiraleah, Venus and Weekender. Guests can also shop watches from Citizen and Invicta, jewelry from Shae, Starboard's exclusive fashion jewelry brand, and ultra-modern beauty and wellness essentials from NatureWell.

Intentionally designed to surprise and delight vacationers of all ages, *Crafted by Starboard* incorporates eye-catching design features and an interactive floor display.



Appleton Estate unveils elevated Montego Bay boutique

Campari Group Global Travel Retail (GTR) has unveiled a refreshed, elevated Appleton Estate boutique experience at Sangster International Airport in Montego Bay, Jamaica.

Designed to immerse travelers in the story of one of Jamaica's most iconic rums, the boutique reflects the brand's mission to lead the premium dark rum category through craft, provenance, and exclusivity, says the company.

As the second continuously-producing rum distillery in the world – founded in 1749 – Appleton Estate has shaped the identity of Jamaican rum for over 275 years. At its helm is Joy Spence, the world's first female Master Distiller.

Located just 50 miles from the Appleton Estate distillery, the Sangster International Airport boutique blends striking visuals, Jamaican craft elements, and digital touchpoints to create a sense of place designed to mirror the lush Nassau Valley home of Appleton Estate rum.

Biancamaria Sansone, Campari Group Global Travel Retail Marketing and Channel and Customer Marketing Director, commented: "Inspired by the landscape and traditions of where our rums are crafted, the Appleton Estate Montego Bay Boutique brings together provenance,

craftsmanship, and innovation in a way that is both authentic and commercially impactful. Travel retail is instrumental in driving our rum premiumization strategy globally, and this boutique demonstrates how experience-led retail can deepen brand connection and inspire shoppers to explore and trade up within our portfolio."

The boutique is divided into zones, each of which is designed to spark curiosity and deepen appreciation for Appleton Estate's premium dark rum. A dedicated Premium Wall Bay showcases Appleton's most prestigious expressions and will host upcoming exclusives, including a rare Appleton Estate introduction and limited-time offer launching later this year. It will also serve as the home for a travel-exclusive edition planned for 2026.

At the central tasting bar, travelers can explore sensorial experiences led by trained brand ambassadors. The surrounding gondolas feature travel retail exclusives and special seasonal offers.

A curated "Jamaican Favorites" area highlights Campari Group's broader island portfolio. This includes the new Wray & Nephew 200th Anniversary limited-edition collection, launched in July with three label designs – yellow, green, and black. The black and green labels are available exclusively in global travel retail.

Travelers can scan QR codes in-store to unlock exclusive content about each Appleton Estate expression using their smartphone.

To support the boutique refresh, Campari Group has partnered with Avolta on a 360° digital campaign live throughout July. The campaign spans Avolta's social channels, Reserve & Collect platform, app, loyalty programs, and programmatic advertising. Club Avolta members were also able to receive a complimentary branded keychain with any Appleton Estate bottle purchase, which can be engraved on-site.



The bright and welcoming elevated Appleton Estate boutique at Jamaica's Sangster International Airport at Montego Bay.

David de Miguel, Global Head of Liquor at Avolta, commented: "We are pleased to partner with Campari Group to bring this elevated Appleton Estate space to Sangster International Airport. It's a great example of our global strategy to create retail experiences that reflect the true spirit of a place. Just miles from where Appleton Estate is crafted, this space captures the essence of Jamaica; its heritage, flavor, and creativity and brings it to life for travelers in a meaningful, memorable way."

Shane Munroe, Chief Executive Officer, MJB Airports Limited, operators of Sangster International

Airport, commented: "It is a pleasure to have this flag-ship Appleton Estate boutique in the airport for travelers to enjoy, which so beautifully captures the authenticity and culture of Jamaica.

"The boutique is especially significant as the first experience post-security in the departures journey – an area we have dedicated to showcasing natural Jamaica and its rich heritage. For passengers who may not have visited the distillery itself, this space offers a memorable and multi-sensory introduction to one of our island's most iconic brands," he concluded.



Above: The Appleton Estate central tasting bar allows travelers to explore sensorial experiences led by trained brand ambassadors.

Right: Travelers can scan QR codes in-store to unlock exclusive content about each Appleton Estate expression using their smartphone.

