

Identifying & Understanding the Indian Duty Free Shopper

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All data taken from Pi Insight's 2026
Global Shopper database...

14,000

Duty Free shopper interviews

among 14 key nationalities including...



Buyers from
categories inc...

Alcohol

Beauty

Confectionery

Tobacco

Fashion & Acc.

Watches & Jewellery

Today's Presentation

TFWA

**Identifying the
Indian Duty Free
Shopper**

**Understanding the
Indian Duty Free
Shopper**



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A differentiated shopper profile...

	INDIAN SHOPPERS	APAC SHOPPERS
Male	58%	52%
40 & Under	59%	52%
Leisure	72%	87%
1-2 trips per year	70%	75%
Travelling alone	13%	15%



Alternative interests in core categories...



Similar spend & in-store dwell time...

TFWA

**Average
Duty Free
Footfall**



**Average
Category
Spend**



**Average
Category
Items**



**Average
Time Spent
in Store**



Today's Presentation

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The Indian Duty Free Shopper

TFWA

**Differentiated
Familiarity**

**The Gifting
Occasion**

**Interest in
Experimentation**

**Staff
Interactions**

**Influence of
Sustainability**



Differentiated familiarity...

TFWA

48%

Good
quality

31%

Well-known
brand

25%

New &
different

23%

For a treat or
reward

20%

Special edition /
Exclusive



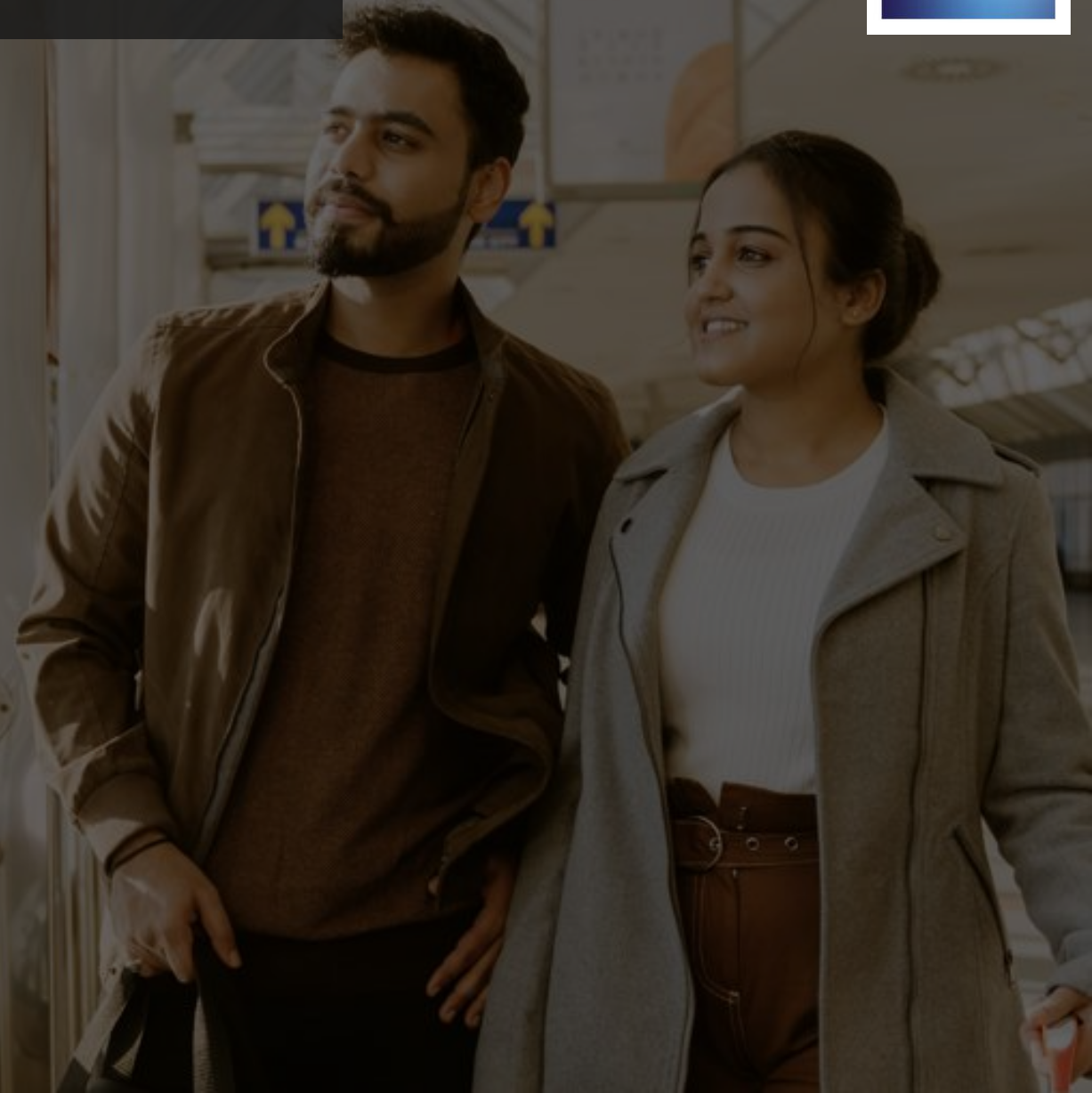
Differentiated familiarity...

TFWA

94%

**Consider Duty Free exclusives
to be an important element of
their shopper experience**

vs. 80% APAC average



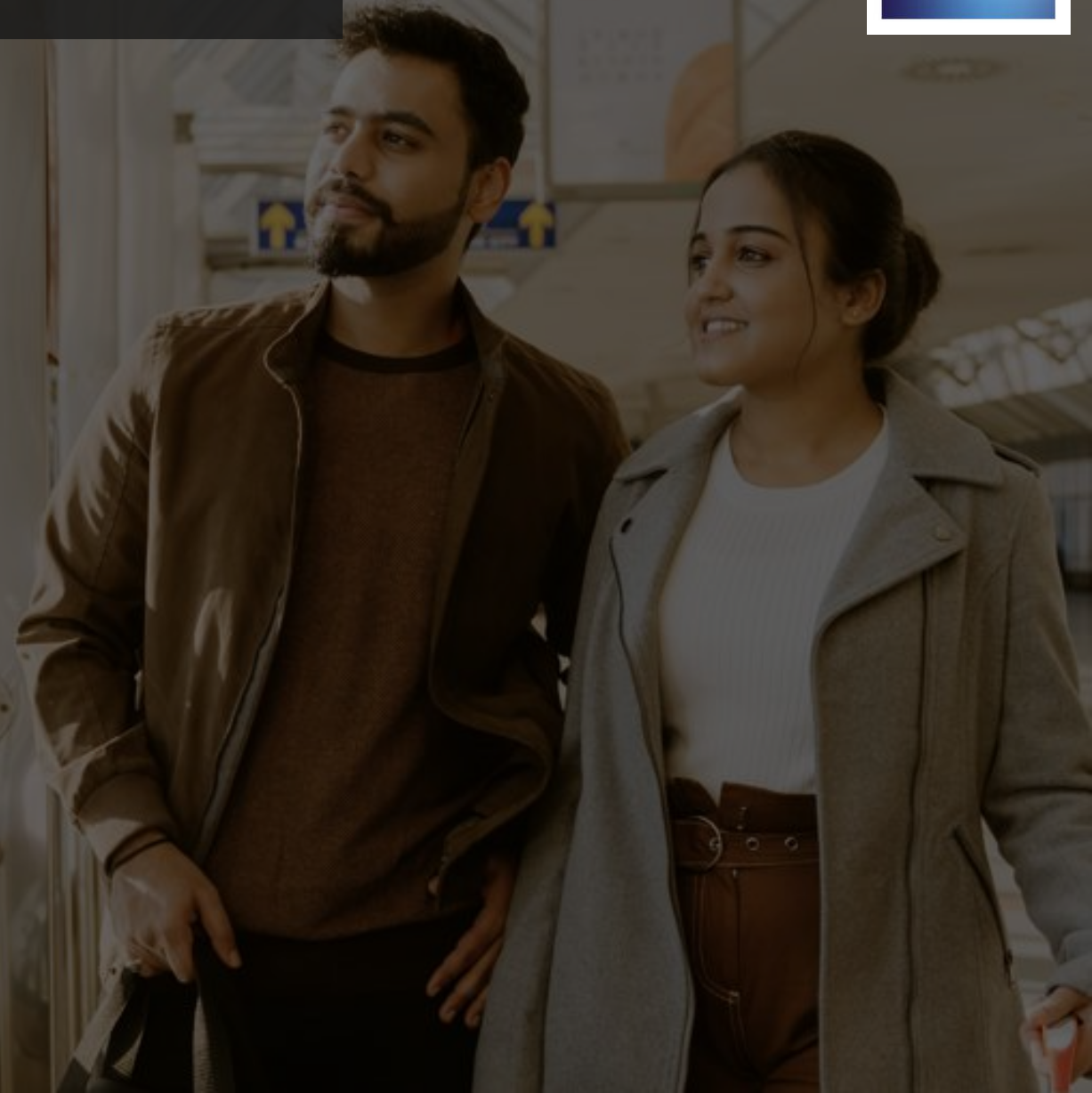
Differentiated familiarity...

TFWA

85%

**Would be more likely to buy a
Duty Free exclusive item vs.
a standard product**

vs. 71% APAC average



The Gifting Occasion...

#1	Purchase for themselves	53%
#2	Purchase for others	31%
#3	Purchase to share	16%



The Gifting Occasion...

TFWA

45%

Gift from my
travels

25%

For a treat or
reward

23%

Birthday or
anniversary

21%

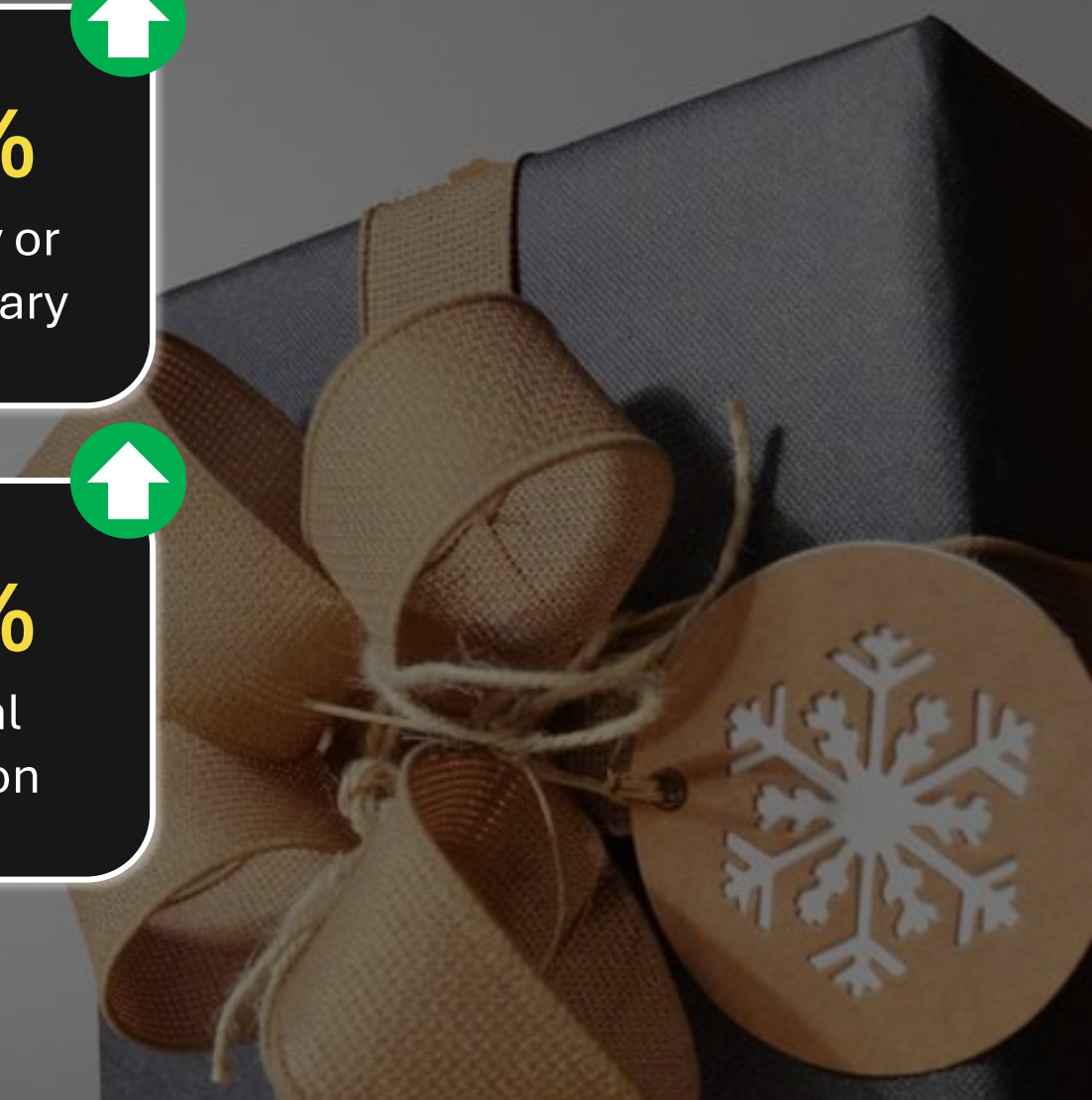
To say
thank you

17%

To reconnect
with someone

14%

Special
occasion



Interest in Experimentation...

TFWA

69%

Purchase a non-regular brand

vs. 60% APAC average



Interest in Experimentation...



69%

Purchase a non-regular brand

vs. 60% APAC average

Fashion

Confect.

Alcohol

Beauty

Tobacco



77%

71%

70%

69%

40%



Staff Interactions...



68%

**Of shoppers interact with staff
when in the Duty Free store**

vs. 49% APAC average



Staff Interactions...



70%

**Of those that interact with staff
are positively influenced**

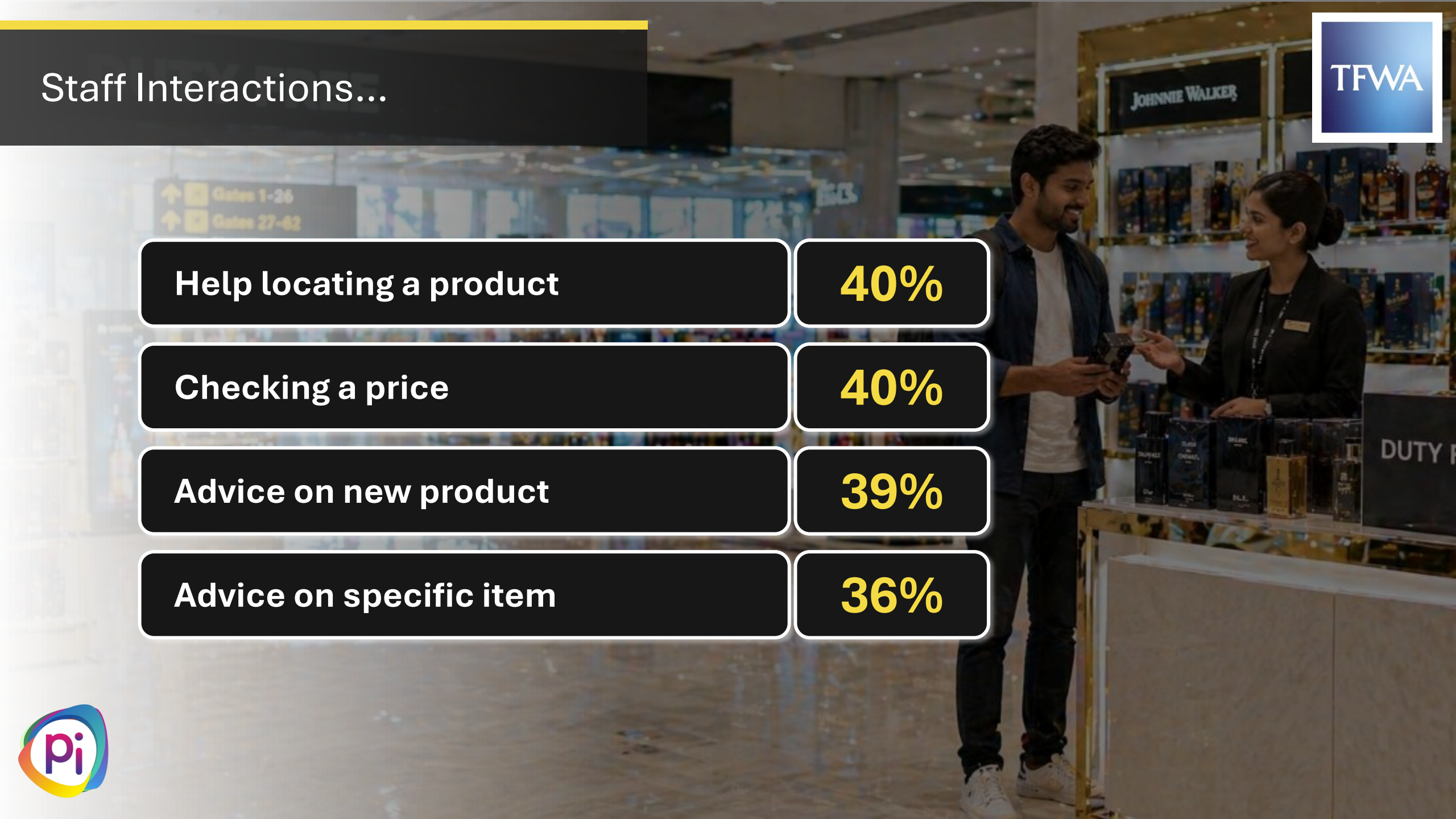
vs. 59% APAC average



Staff Interactions...



Help locating a product	40%
Checking a price	40%
Advice on new product	39%
Advice on specific item	36%



77%

**Consider sustainability to be
important when shopping in Duty Free**

vs. 64% APAC average



Influence of Sustainability...



If deciding between two items and one had greater sustainability credentials...

17%
Slightly more likely to buy item



33%
Much more likely to buy item



41%
Definitely decide to buy item



92%
Would be positively influenced



The Indian Duty Free Shopper

TFWA

**Differentiated
Familiarity**

**The Gifting
Occasion**

**Interest in
Experimentation**

**Staff
Interactions**

**Influence of
Sustainability**



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The Indian Duty Free shopper has **specific wants, needs and expectations** for the Duty Free channel

They are differentiated in terms of profile, categories of interest, purchase dynamics and behaviours

Differentiation, gifting, experimentation, staff & sustainability can unlock the Indian opportunity





Thank you!

**Stephen Hillam
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Pi Insight**

