



Fashion & Accessories in TR

Quantitative Research for TFWA
2026



Fashion is a small slice of Duty Free spend today - and that is exactly the opportunity

Only around 1 in 10 Duty Free buyers purchase Fashion & Accessories – far behind Perfumes or Alcohol. Penetration fell sharply after COVID and has only partly recovered. This workshop asks: what would it take to convert more of the demand that is clearly already there?

9%

of Duty Free buyers **purchase Fashion & Accessories** – well behind Perfumes (30%) and Alcohol (23%)

12% → 9%

global **penetration** pre-COVID vs H1 2026
– the category still hasn't recovered

61%

of Fashion & Accessories **visitors DO convert into buyers** – so the demand is real.

This workshop is about the '**why**' and the '**how**' to grow it!

Methodology: qualitative exploration, quantitative validation

STEP 1 | QUALITATIVE

9 online focus groups

F2F recruitment at airports, then 2-hour online groups in July 2026

3

Europe

3

Middle East

3

ASPAC

STEP 2 | QUANTITATIVE

N=2,600 fashion visitors

Online survey among travellers recruited at airports; fieldwork in August 2026

1,000

Europe

800

Middle East

800

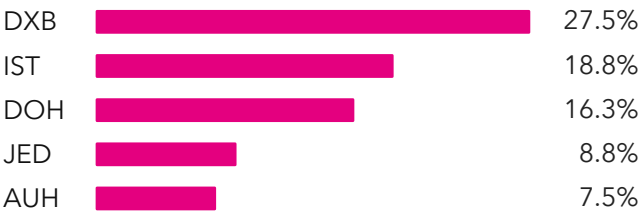
ASPAC

Airport quotas followed the international passenger traffic mix; top 5 airports per region shown below.

EUROPE



MIDDLE EAST



ASPAC



01

**The airport is
where fashion
decisions are
made**



61% convert into buyers – and 80% decide once they're airside

61%

of **Fashion & Accessories**
visitors converted into **buyers**
at the airport

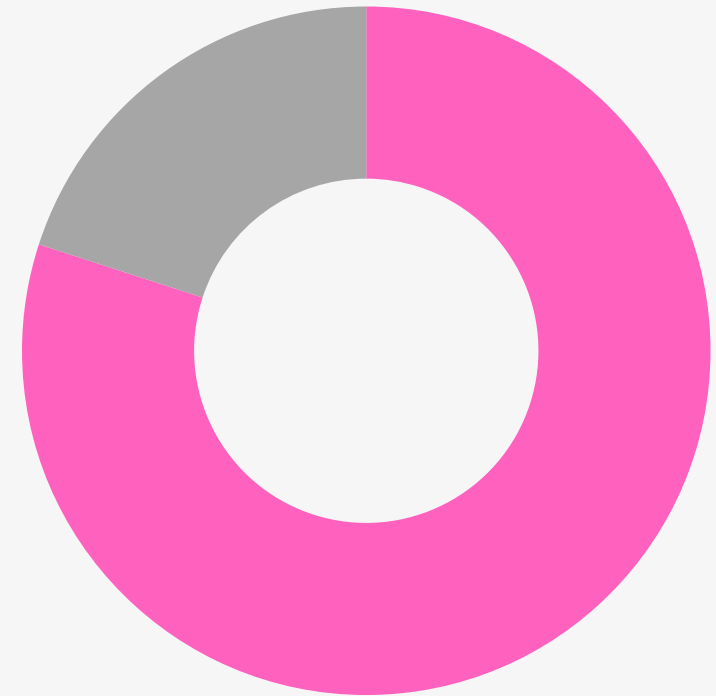


20%
of purchases were
planned

80%
of purchases were
in-store decision



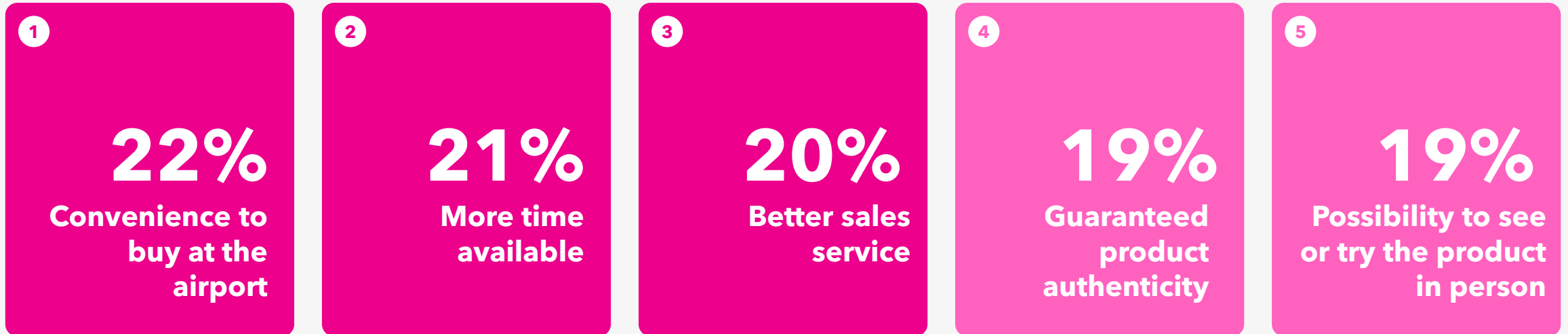
Luxury shoppers are significantly more likely to **plan** their purchase (27%).



Convenience turns existing demand into airport purchases

TOP 5 DRIVERS TO PURCHASE

MAKE FASHION EASY TO BUY NOW: Prioritise fast service, easy product trial, visible availability and clear reassurance on authenticity and returns to remove friction from purchase.



Qualitative context

AIRPORTS CONVERT EXISTING DEMAND

Most purchases fulfil a need that already existed – a gift to bring home, a replacement for something forgotten, or a product the traveller already had in mind – rather than being created from zero.

02

Clothing leads demand, but the journey makes it harder to convert



Clothing is the anchor category – everything else rides along



9. Which type(s) of fashion items did you browse in AIRPORT ASSIGNED? Q37. Please rank the following fashion items from most to least relevant in an airport setting. Base: All respondents N=2600

10. Which type(s) of fashion items did you purchase in AIRPORT ASSIGNED? Base: Fashion Buyers N=1573

Practical friction, not desire, is holding fashion back

TOP 5 BARRIERS TO PURCHASE



Europe over-indexes on **lack of luggage space** (27%), **fit and sizing** (31%), **unclear price advantage** (29%), **not enough time** (22%).



Qualitative context

PORTABLE & GIFT-READY CONVERTS

Travel constraints favour products that are easy to carry and to gift. Cabin limits and luggage space make compact, size-free and gift-ready items the natural choice, especially sunglasses, small leather goods and accessories.

Gifting is a real purchase mission – and it favours easy-to-carry items

16%

of Duty Free fashion buyers purchased their **item as a gift** for someone else

18%

of **Accessories** purchases are bought as a gift – the highest of any category

17%

of **Handbag** and **Small Leather Goods** purchases are gifts – both compact, easy-to-carry items



Qualitative context

GIFTING FITS THE JOURNEY

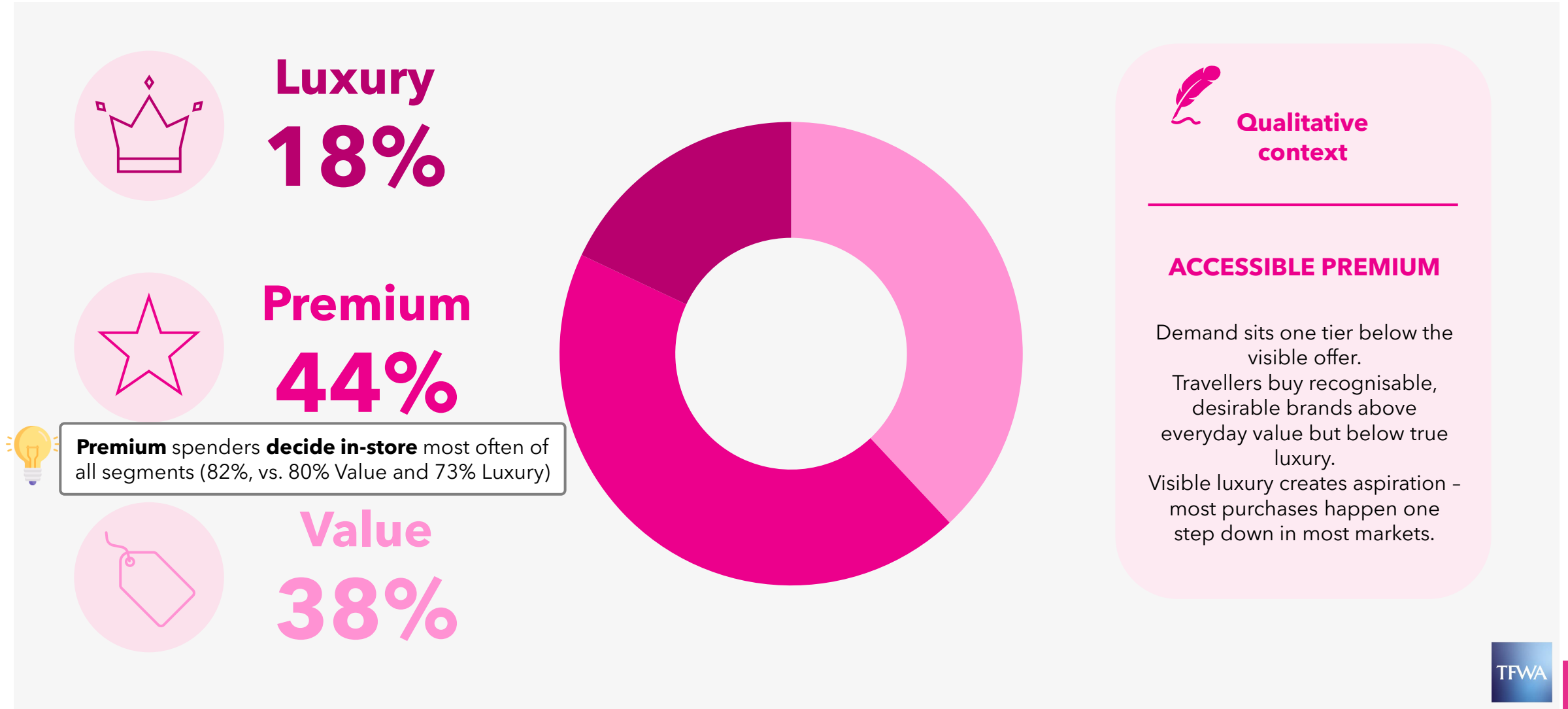
Travel constraints make gifting easier when items are compact, size-free and simple to carry. Accessories, handbags and small leather goods fit this mission better than bulkier or harder-to-size categories, giving retailers a clear opportunity to spotlight “easy gift” fashion moments in-store.

03

**The next
growth space is
the premium
middle**



Premium anchors airport fashion demand



11. How much did you spend in total on fashion in AIRPORT ASSIGNED during your trip? Base: Fashion buyers N=1573

The brand mix is too narrow for where demand actually sits

FASHION BRAND TYPES THAT COULD DRIVE MORE AIRPORT PURCHASES



92% Affordable Brands



83% Premium Brands



76% Luxury Brands



Qualitative context

BUILD THE PREMIUM MIDDLE

Across many airports, the visible fashion offer is concentrated at the luxury end, while demand is strongest in accessible premium. Travelers consistently favor recognizable, aspirational brands over full luxury.

TYPES OF FASHION BRANDS OF INTEREST



Premium demand is universal – it's local-brand appeal that's regional, and it skews Europe

	EUROPE	MIDDLE EAST	ASPAC
Premium brands	56%	58%	58%
Global names	43%	34%	34%
Local / regional brands	42%	33%	33%
Accessible brands	29%	22%	22%
Luxury brands	20%	28%	28%

REGIONAL NUANCE: Premium is a shared opportunity across all three regions. The difference lies in how to localise the offer: Europe responds more strongly to both global and local/regional brands, while Middle East and ASPAC show a relatively stronger luxury orientation.

04

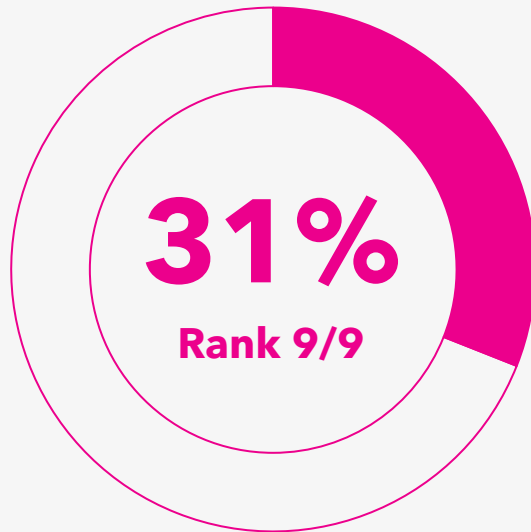
**The value equation
has changed:
travellers want
proof**



Price is the clearest friction point – and the biggest opportunity

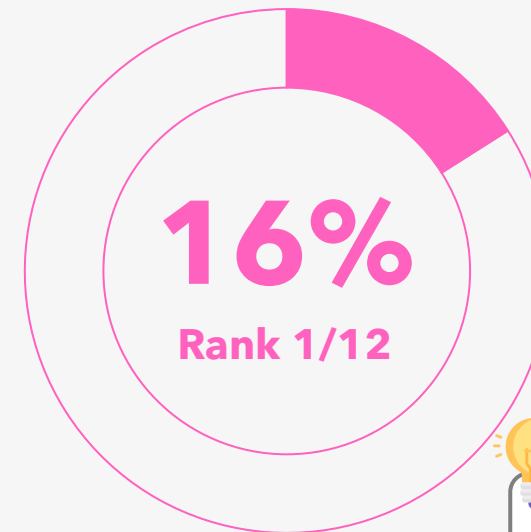
SATISFACTION ACROSS THE FASHION OFFER (T2B)

PRICES



TOP 10 PRIORITY IMPROVEMENT FOR AIRPORT FASHION RETAIL

BETTER PRICES



Europe stands out for **better prices** (21%).



Qualitative context

SAVINGS MUST BE VISIBLE AND PROVABLE

Clear savings and benefits trigger purchase when easy to verify. Visible discounts, Duty-Free advantages, gifts with the purchase and loyalty benefits convert when they are credible and easy to validate.

Value is often judged instinctively – online is the key external benchmark

HOW TRAVELLERS BENCHMARK AIRPORT FASHION PRICES

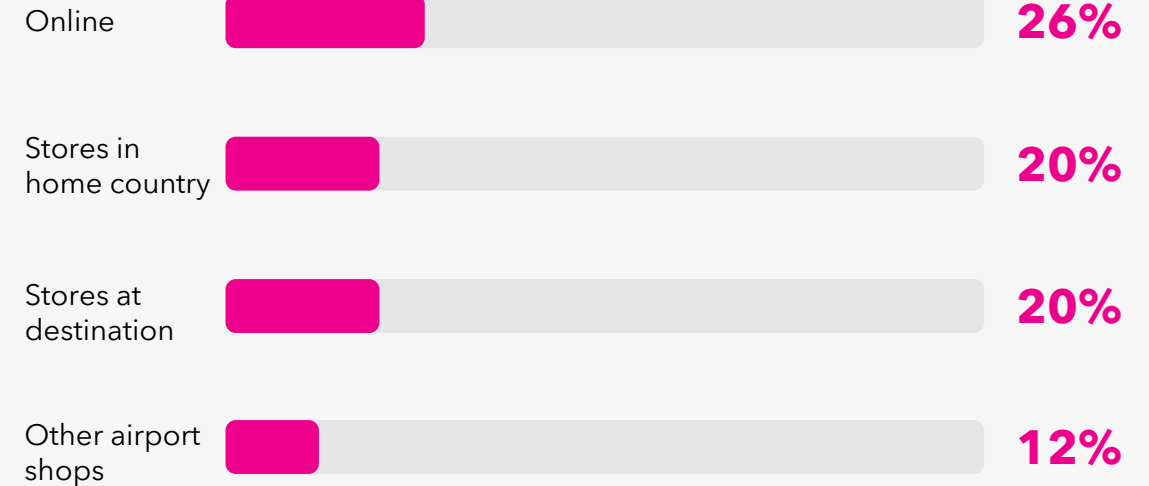
40%

Rely on their own sense of what it should cost

33%

Don't compare prices at all

EXTERNAL PRICE BENCHMARKS



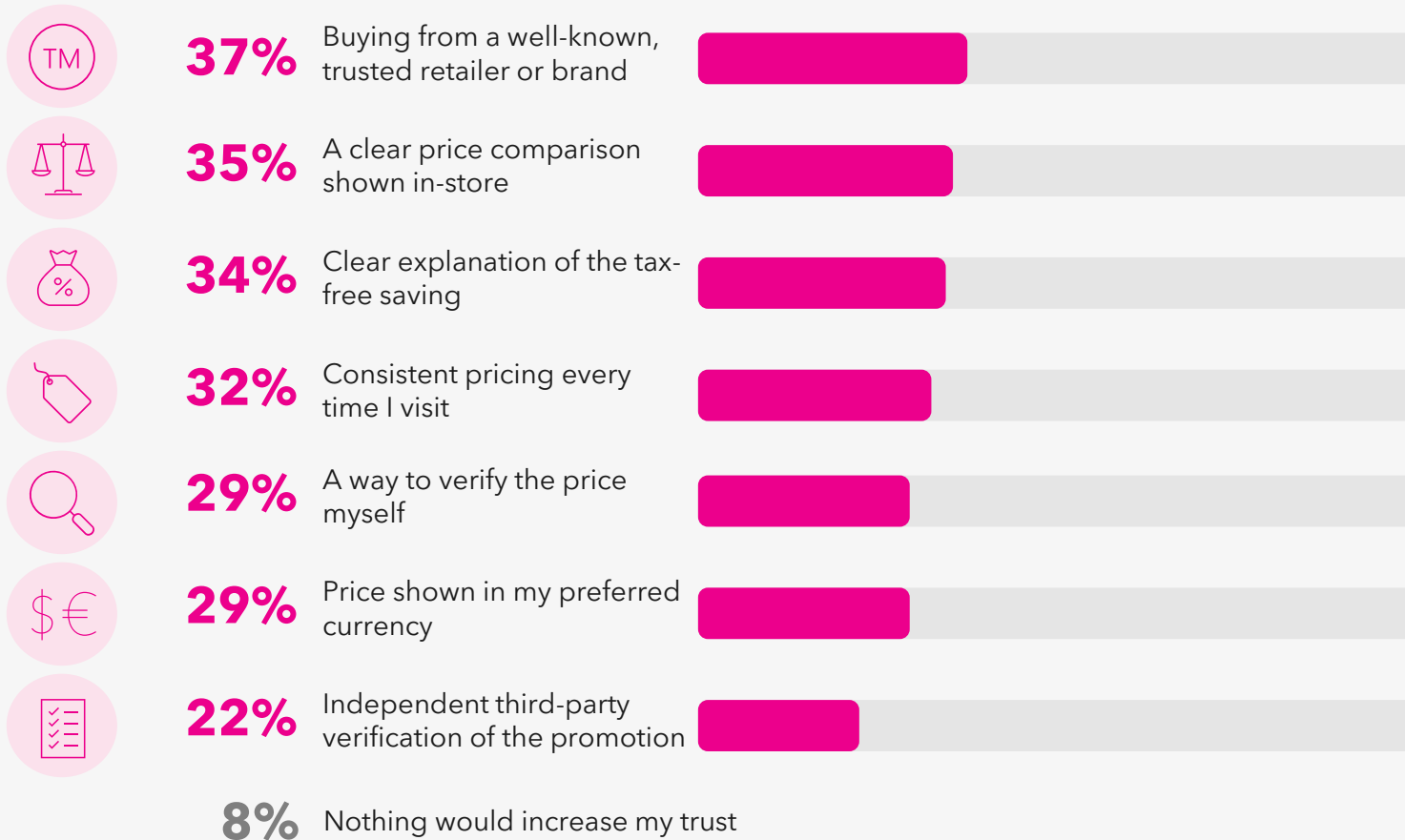
Qualitative context

SEGMENT NUANCE: Value shoppers are more instinctive and benchmark more actively, especially against both online and home-country stores, while Premium shoppers particularly rely on online as their key comparison point

TFWA

Transparency turns price claims into credible value

WHAT WOULD BUILD MORE TRUST IN PROMOTIONS & DISCOUNTS



Qualitative context

PRICE ADVANTAGE IS NO LONGER ASSUMED

Prices are checked in real time – only advantages that survive the check convert.

Real-time benchmarks against online, downtown and destination prices mean “cheaper than downtown” is no longer believed.

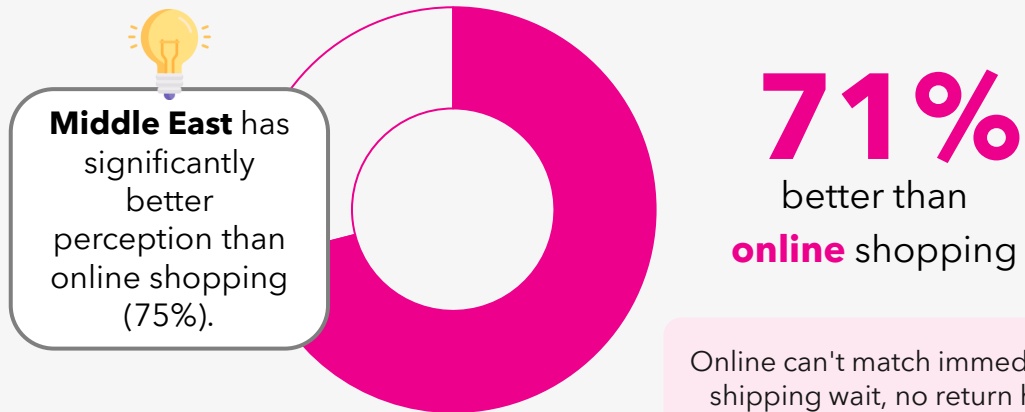
05

**The airport beats
online, but must
prove why it
beats downtown**



Online is easier to beat; downtown is the real test

PERCEPTIONS OF AIRPORT FASHION SHOPPING VS. OTHER CHANNELS



Online can't match immediacy: no shipping wait, no return hassle, and the chance to see, touch and try the product before buying now.



The margin is thinner here: downtown still wins on browsing time, range and try-on. Newest collections, exclusives and clear pricing are what close the gap



Qualitative context

EXCLUSIVITY NARROWS THE DOWNTOWN GAP

Beating online is the easy part: instant access and no delivery wait already win. Beating downtown is harder – it takes newest collections, exclusive Duty Free finds and clear pricing to justify buying now rather than waiting for the city store.

Newness and exclusivity are what make travellers choose the airport

TOP 5 REASONS TO CHOOSE AIRPORT FASHION SHOPPING (COMPARING TO CITY STORES AND ONLINE)



Qualitative context

GIVE TRAVELLERS A REASON TO BUY HERE

Travellers do not want the airport to simply replicate downtown or online shopping. New collections, airport exclusives and distinctive brand experiences make the purchase feel more special, more urgent and more relevant to the journey.

06

Store formats play different roles



Store formats play different roles: conversion at scale, halo in boutiques

CONVERSION AT SCALE

Multi-brand stores and the main Duty Free section are strongest for broad reach and efficient conversion during the airport journey.

86%

Multi-brand stores

86%

Main Duty Free store

78%

Standalone boutique

BRAND HALO

Standalone boutiques have smaller reach, but their value is the **brand relationship they create beyond the airport.**



36%

received higher service and attention



32%

fresh and exciting way to experience the brand



30%

discovered airport-exclusive products



65%

likely to visit the downtown brand boutique in future



Qualitative context

PREMIUM SPEND IS NOT JUST ABOUT THE PRODUCT

A calm, comfortable environment and attentive service can make the airport feel like a more rewarding place to shop, helping justify premium spend.

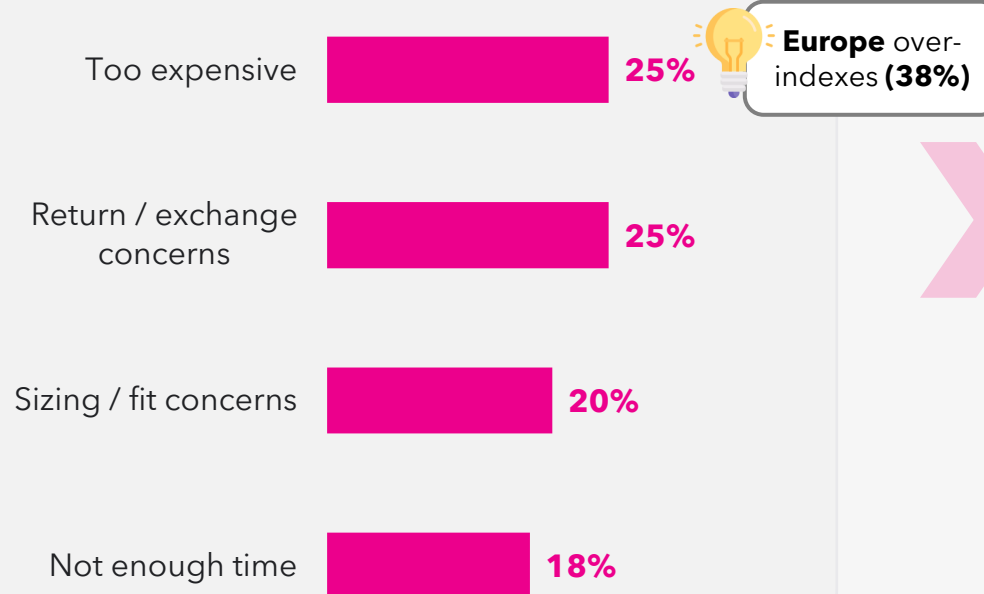
07

Fashion loses sales through friction

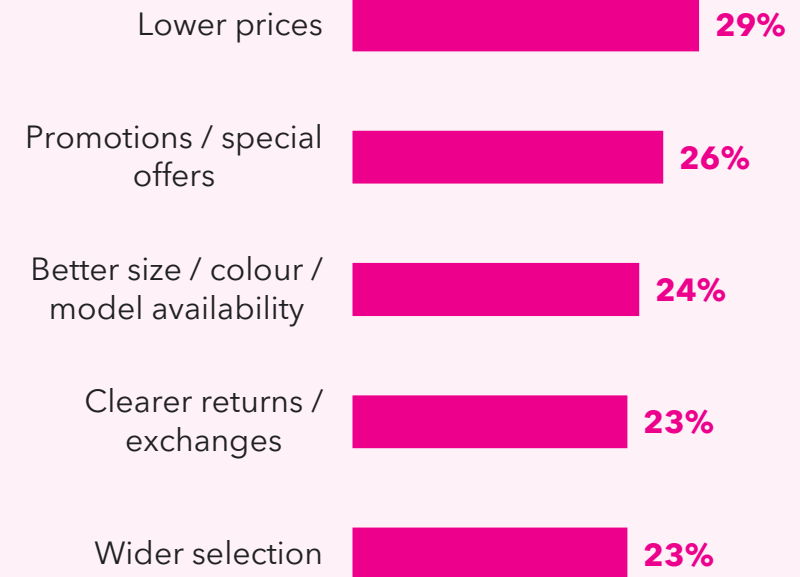


Every non-buyer has a specific, fixable reason not to convert

WHY THEY BROWSED BUT DID NOT BUY



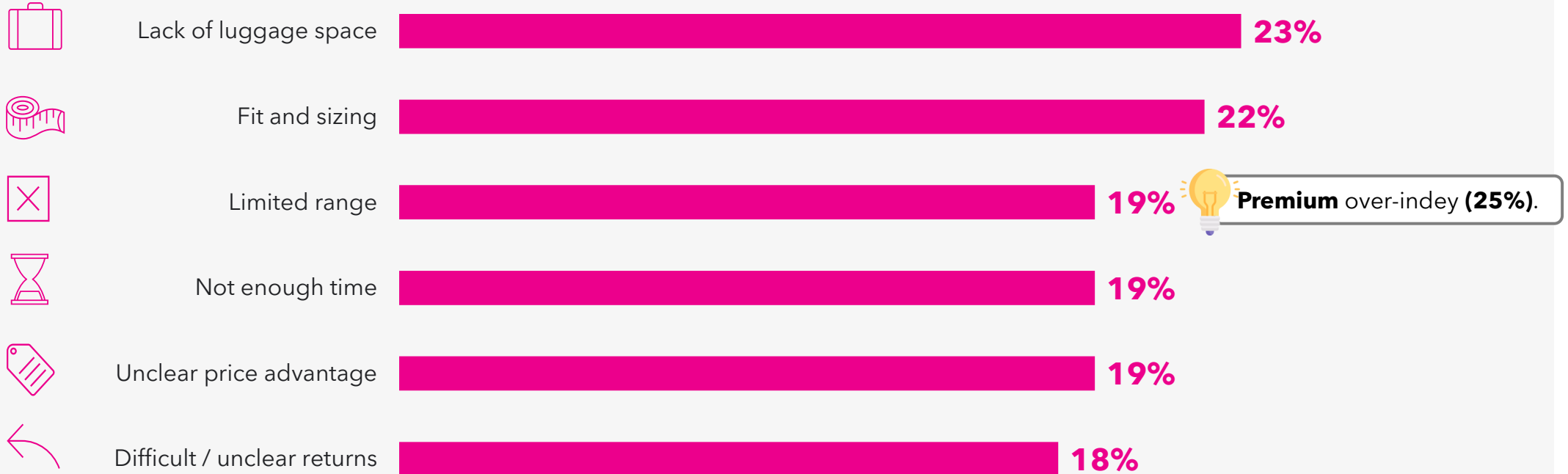
WHAT COULD MOTIVATE THEM NEXT TRIP



Europe is significantly higher on **lower prices (37%)** and **promotions (33%)**; **Middle East** on **clearer returns/exchange information (30%)**

The biggest barriers are practical: carrying, fit, value and time

BIGGEST BARRIERS TO BUYING FASHION IN AIRPORT STORES



Qualitative context

FRICION KILLS READY PURCHASES

Travellers may already be interested, but time pressure and practical barriers can stop the sale at the last moment. Removing friction across fit, returns, carrying and checkout is key to converting existing intent.

08

**Service must be
useful, not
ceremonial**



Service is a conversion tool – helping travellers decide quickly, not a luxury add-on

STAFF HELP THAT MAKES DIFFERENCE



33%

Styling advice



33%

Brand story/history



32%

Sizing and fit help



31%

Personalised recommendation



30%

Product care



29%

Availability information



29%

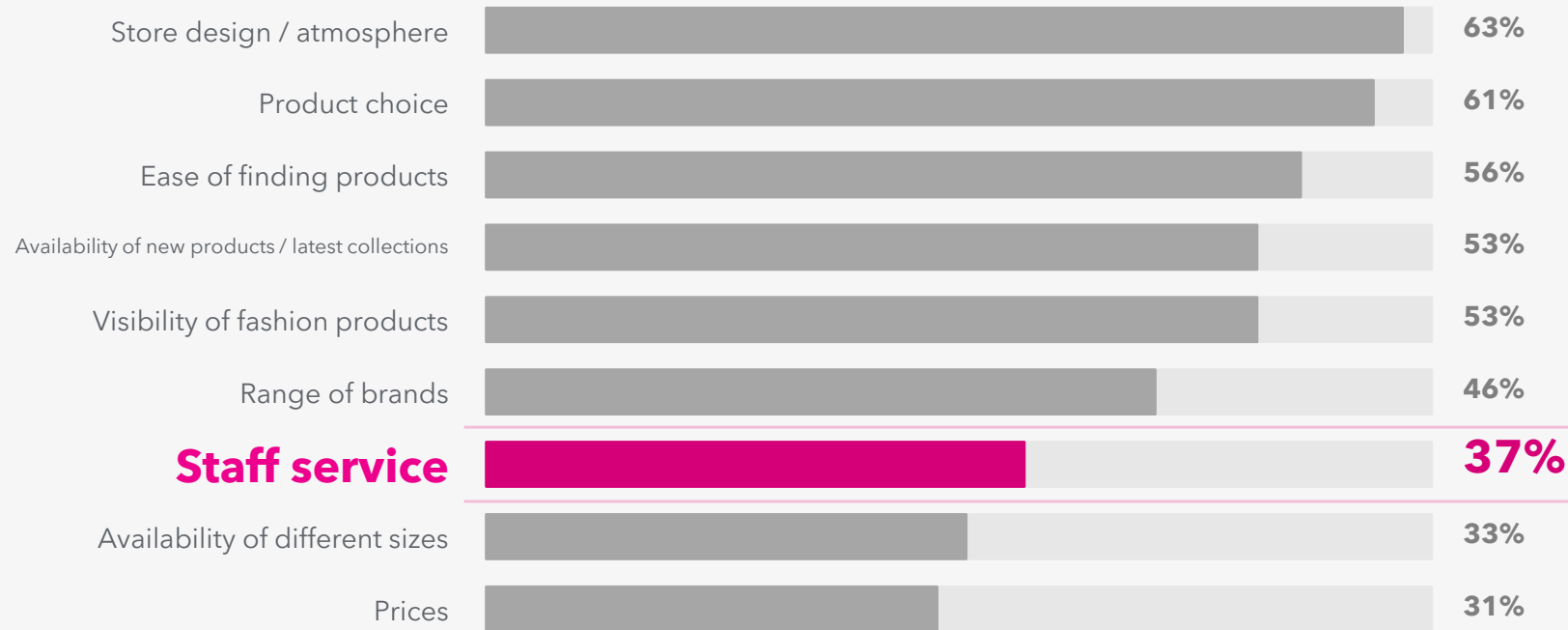
Price comparison

Europe over-indexes on **sizing/fit help (38%)**, **personalised recommendations (36%)**, **availability information (34%)** and **price comparison (33%)**;

Value segment over indexes on considering **styling advice (40%)** and **sizing/fit help (37%)** helpful.

Staff service is the biggest satisfaction gap in the experience

SATISFACTION ACROSS THE FASHION OFFER (T2B)



37% of travellers are satisfied with staff service



Qualitative context

SERVICE MAKES OR BREAKS CONVERSION

Travellers want staff who are knowledgeable, calm and available when needed, without being intrusive. The right balance of expertise and space can turn interest into purchase.

09

One global playbook, three regional priorities



Regional priorities: same rules, different emphasis

EUROPE

Prove value and make buying easier

- 38% too expensive among non-buyers
- 31% fit / sizing barrier
- 29% unclear price advantage
- 33% accessible brand interest

Prioritise accessible / premium brands, visible price proof, smoother try-on and returns.

MIDDLE EAST

Premium experience needs reassurance

- 71% boutique halo to downtown
- 30% want clearer returns / exchanges
- 29% want better size / model availability
- 24% service drives purchase

Use service, exclusivity and availability to justify spend while reducing after-sales uncertainty.

ASPAC

Win the informed shopper

- 55% looked online before trip
- 69% clothing purchase
- 68% multi-brand browsing
- 33% airport-exclusive product appeal

Build pre-trip visibility around newness, exclusives and clear reasons to buy now.

10

Fashion must become travel- native



Airport fashion works when it feels different, useful and worth buying now

TOP REASONS TO BUY FASHION AT THE AIRPORT



35%

Innovative / unique brand experience



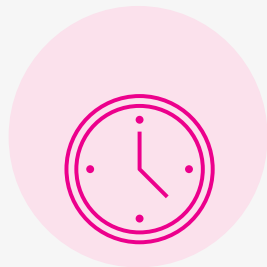
31%

Price advantage / tax-free saving



30%

New collection



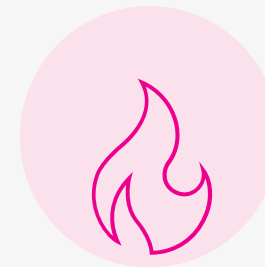
29%

Convenience - saves time versus shopping elsewhere



28%

Treating myself / self-reward



28%

Exclusive products not available elsewhere



Qualitative context

GIVE TRAVELLERS A REASON TO BUY HERE

Airport fashion works best when it offers something meaningfully different from shopping elsewhere – newness, exclusivity and a distinctive experience, backed by clear value and convenience.



Europe over-indexes on **new collections (33%)** and **convenience/time-saving (36%)**.

TFWA

Difference builds confidence, but value closes the sale

WHAT BUILDS CONFIDENCE TO BUY FASHION AT THE AIRPORT



35%

The newest collections



33%

Exclusive duty-free finds



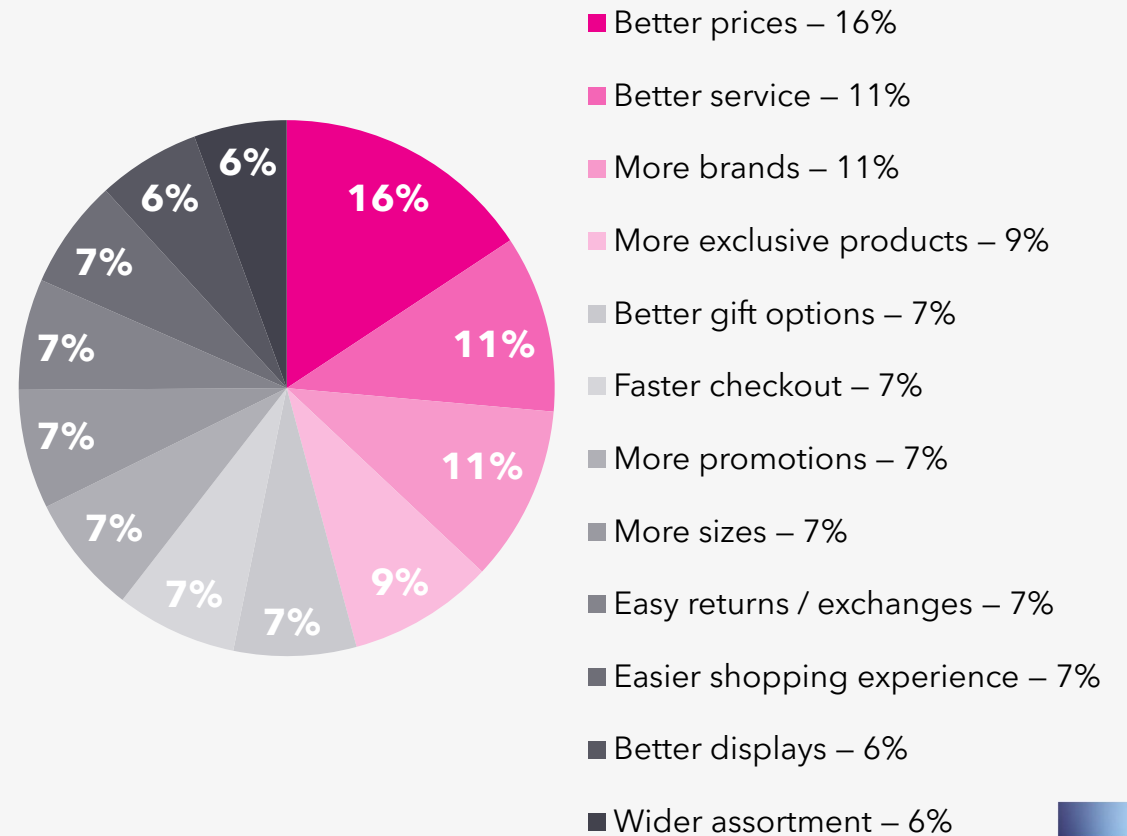
28%

Clear, upfront pricing



Europe over-indexes on **clear pricing (32%)** and **lower prices (29%)** as confidence drivers for airport fashion purchases.

WHICH ONE IMPROVEMENT WOULD MOST INCREASE PURCHASE (100%)



Conclusions

ACTIONS TO UNLOCK GROWTH



What to do next: make airport fashion travel-native

CONCLUSION

Fashion has real conversion potential, but growth will come from making the airport offer easier to buy, easier to trust and more distinctive than city or online alternatives.

1

Trigger the airside decision

Use visibility, convenience, trial and reassurance to convert shoppers who decide in-store.

2

Build the premium middle

Broaden accessible and premium brands while keeping luxury where it adds aspiration and halo.

3

Prove the value

Make savings credible through clear pricing, tax-free proof and trusted retailer cues.

4

Make the airport different

Lead with newest collections, exclusives and distinctive experiences that justify buying now.

5

Remove friction first

Fix sizing, returns, carrying, checkout and service so intent can become purchase.

TAILOR THE EMPHASIS BY REGION

Europe: value proof + practicality

Middle East: premium experience + reassurance

ASPAC: pre-trip visibility + exclusives

Growth will come from designing fashion around the travel moment!