

NTRG Q1 2026 REPORT



Nordic Travel
Retail Group

SWEDISH TRAVELLERS

Air Traffic Trends and Shopping Behavior at Airports & Ferries



Background & Methodology

Background

The NTRG is partnering with the leading Travel Retail Marketing Intelligence agency m1nd-set since 2022 to provide **exclusive insights of the Nordic Travel Retail market** for **NTRG members**.

m1nd-set conducts yearly ca. **2.000 interviews with Ferry passengers** in the Nordics (representative based on the ferry traffic), and ca. **4.000 interviews with Airport passengers** across various Nordic airports.

Every quarter m1nd-set delivers a report for NTRG members on **one specific subject** from the survey regarding the Travel Retail & Duty Free shopping behavior.

The results in the reports are always shown on a **total basis**, and not broken down by airports or ferry lines to assure reliable and representative results based on the sample size.

This quarter's topic is focusing on **Swedish travelers**, showing **differences in air traffic and shopping behaviour** between Swedish and other Nordic nationalities in Nordic Airports and Ferries.

Key Facts about Sweden & Swedish Travelers

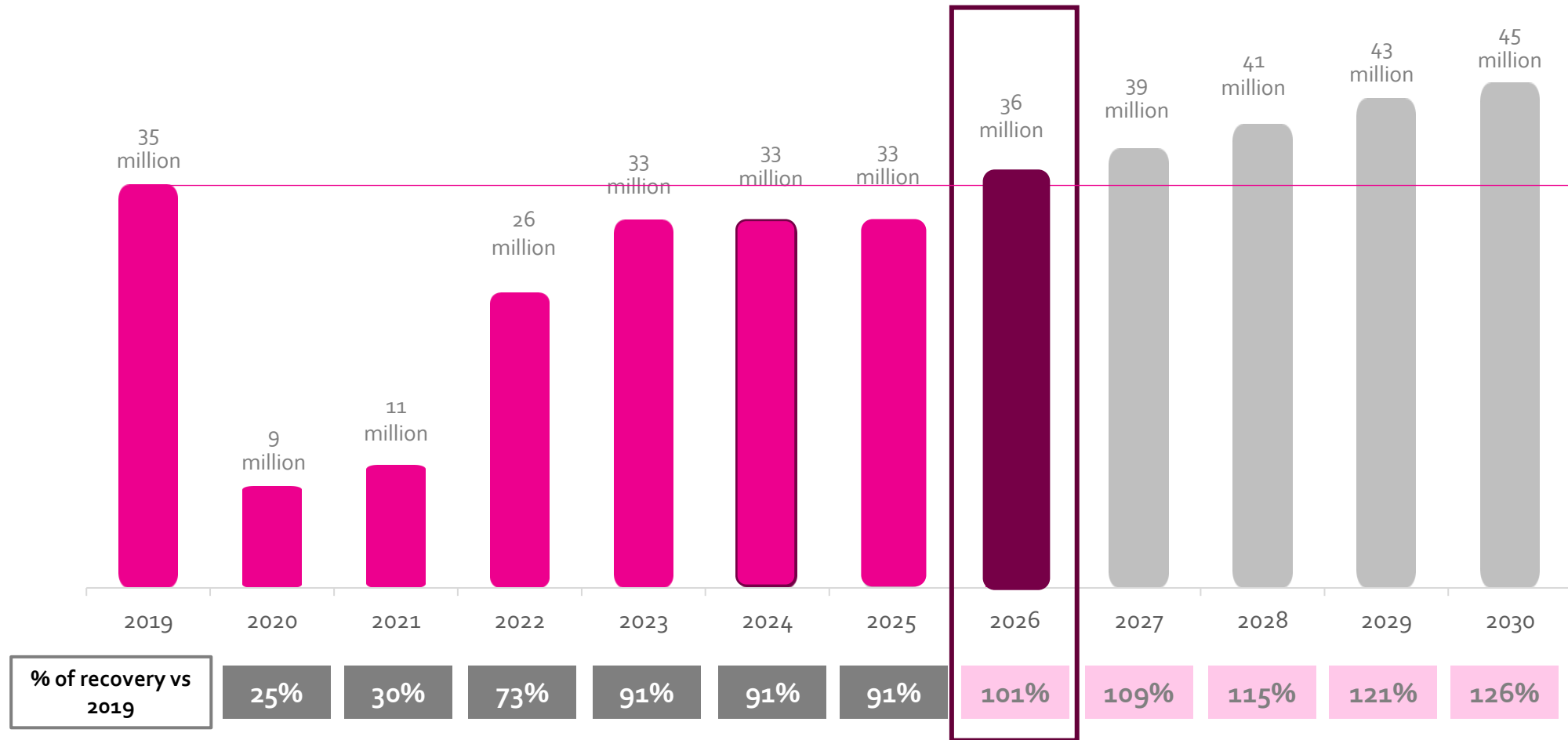
- The population is approximately 10.6 million, nearly twice the size of its closest neighbors in the Nordics
- The fifth-largest country in Europe by area
- Sweden is an EU member but does not use the €uro
- After a recession in 2023 and flat growth in 2024, Sweden's economy is gaining momentum. Real GDP is projected to have grown modestly in 2025, but expected to accelerate between 2.6% and 2.9% in 2026.
- About 88% of Swedes live in urban areas, primarily in the southern third of the country
- Top Travel Destinations: When traveling abroad, Swedes most frequently visit Denmark, Spain, Germany, the UK, and Norway. The United States is their most popular long-haul destination.
- Seasonal Travel Habits: Roughly half of the Swedes travel for summer vacations; while many go abroad for beach holidays, nearly half of those travelers choose to stay within Sweden.

AIR TRAFFIC

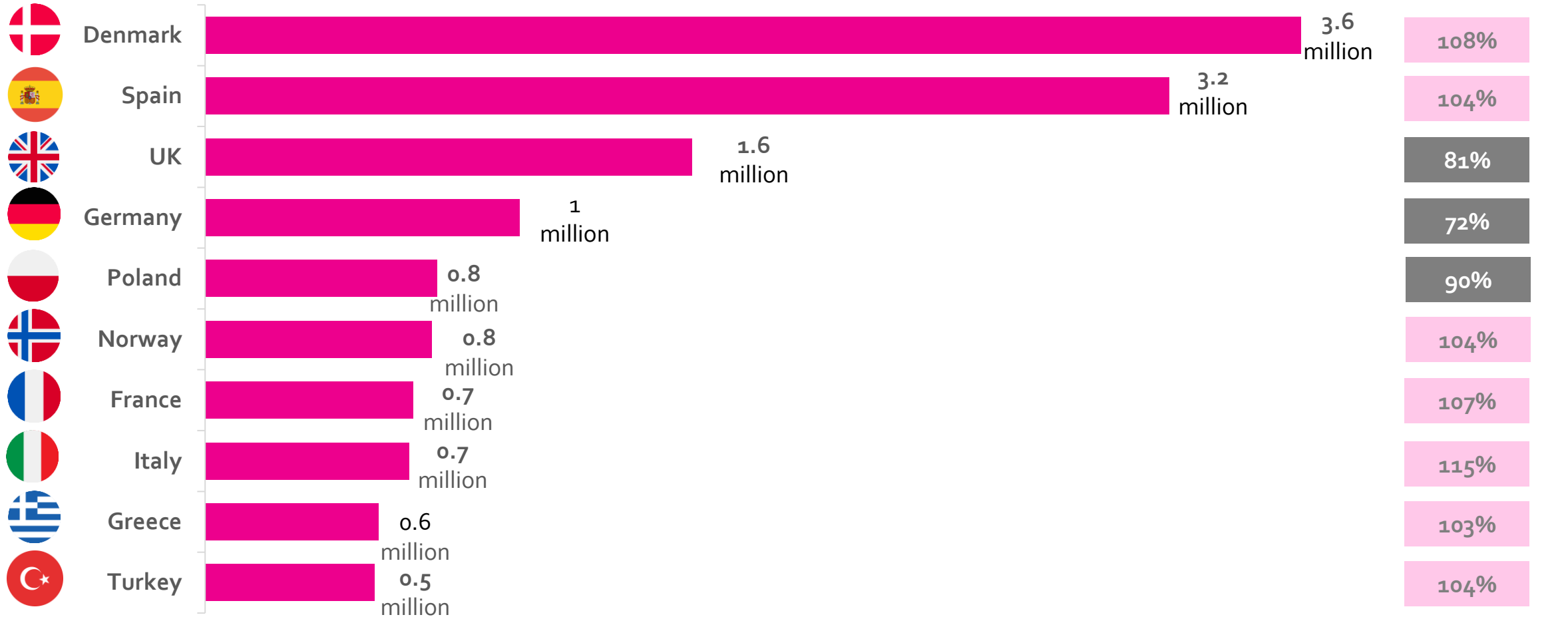
SWEDISH TRAVELERS

SWEDISH INTERNATIONAL FLIGHTS EVOLUTION

International departures and arrivals (in millions) from 2019 to 2030 and % of recovery vs 2019

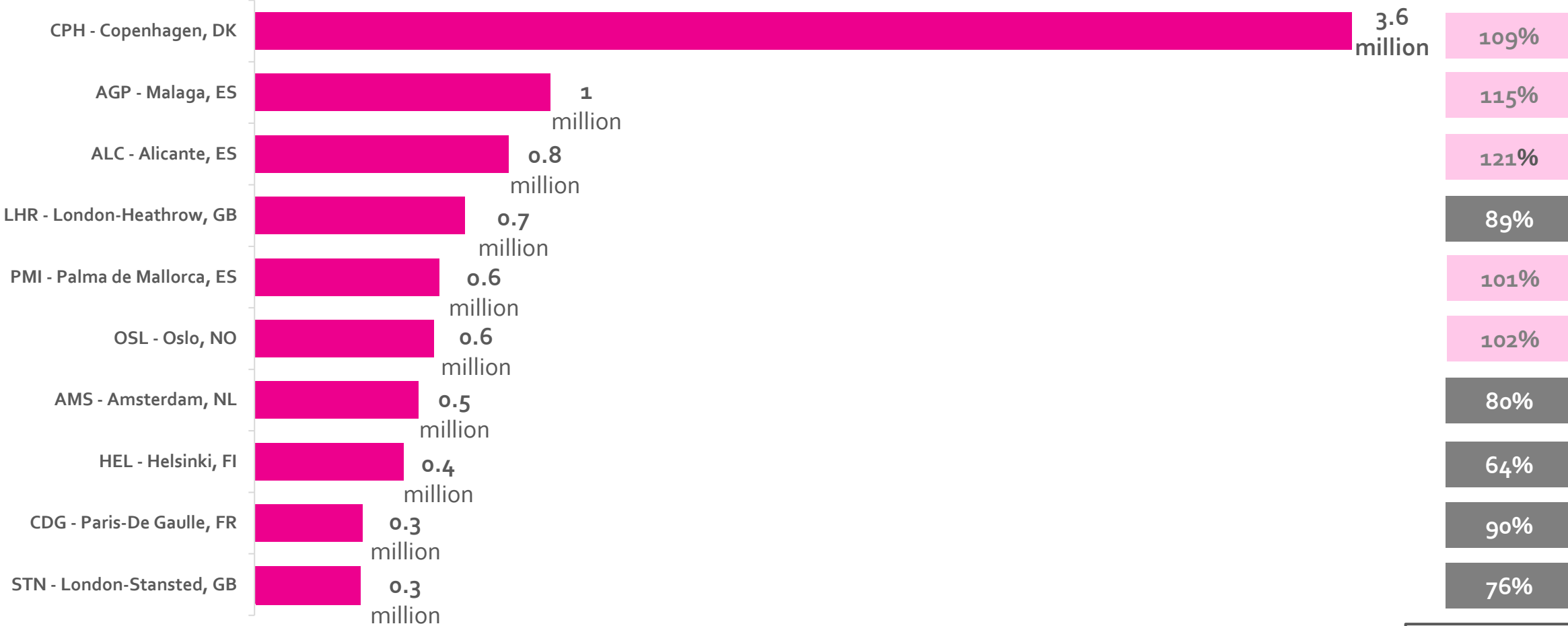


TOP 10 DESTINATIONS VISITED BY SWEDISH TRAVELLERS IN 2025



**% OF RECOVERY
VS 2019**

TOP 10 AIRPORTS VISITED BY SWEDISH TRAVELLERS IN 2025



**% OF RECOVERY
VS 2019**

AIRPORT SHOPPING BEHAVIOR

SWEDISH TRAVELLERS



Swedish travelers visit duty-free stores more frequently but convert less often than other Nordic nationalities. However, their average spend is substantially higher, indicating a tendency toward higher-value purchases.



SHOPPING KPIS – IN NORDIC AIRPORTS

Swedish

FOOTFALL

(% of DF visitors out of total PAX)

39%

CONVERSION

(% of DF buyers out of DF visitors)

60%

PURCHASE RATE

(% of DF buyers out of total PAX)

24%

AV SPEND (€)



Other Nordic nationalities

FOOTFALL

(% of DF visitors out of total PAX)

37%

CONVERSION

(% of DF buyers out of DF visitors)

64%

PURCHASE RATE

(% of DF buyers out of total PAX)

24%

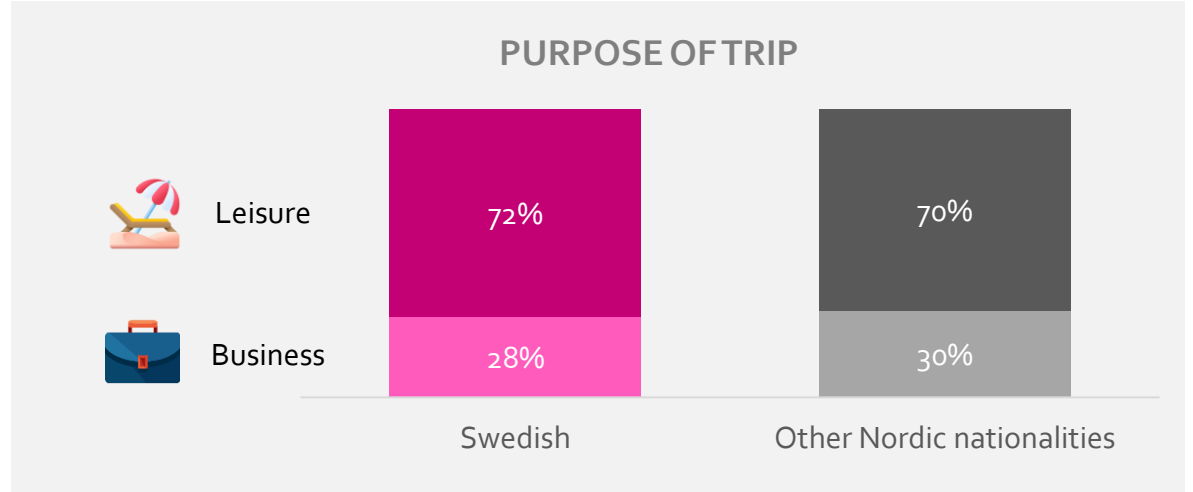
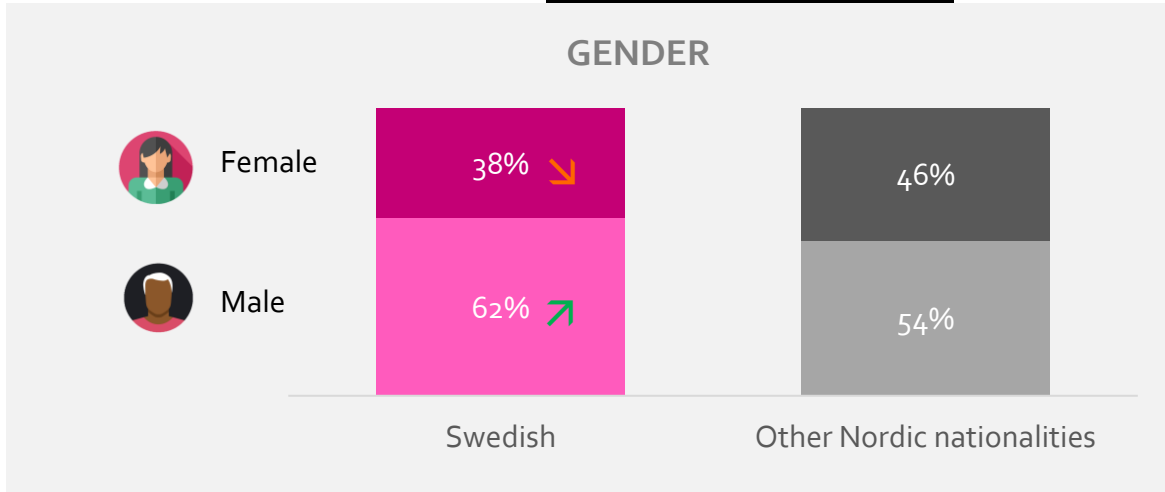
AV SPEND (€)



Swedish visitors are more likely to be males and are older on average. Swedish travelers are slightly less likely to travel in premium class, suggesting a lower willingness to spend on improved travel comfort.

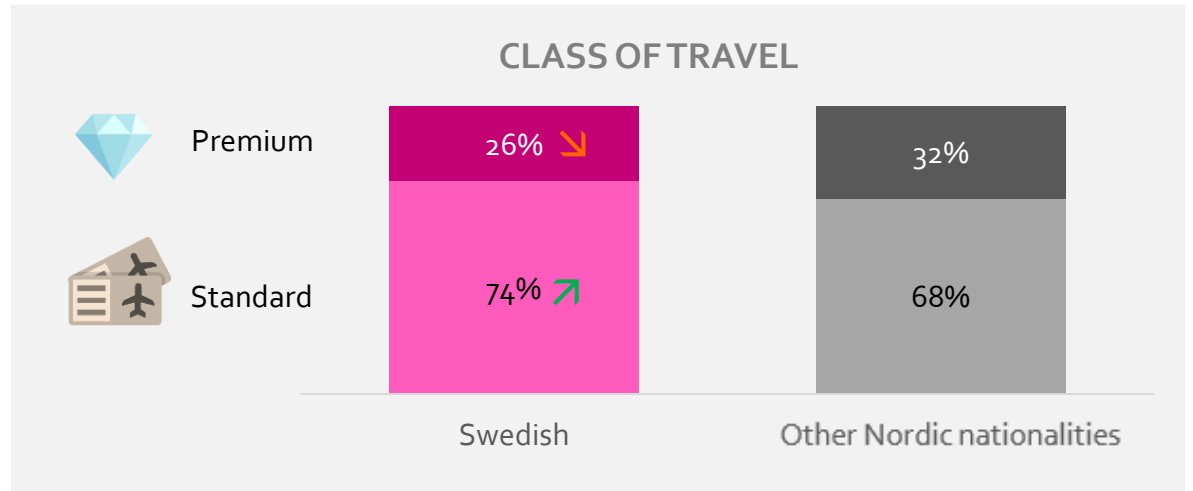


DF VISITORS PROFILE – IN NORDIC AIRPORTS



AGE

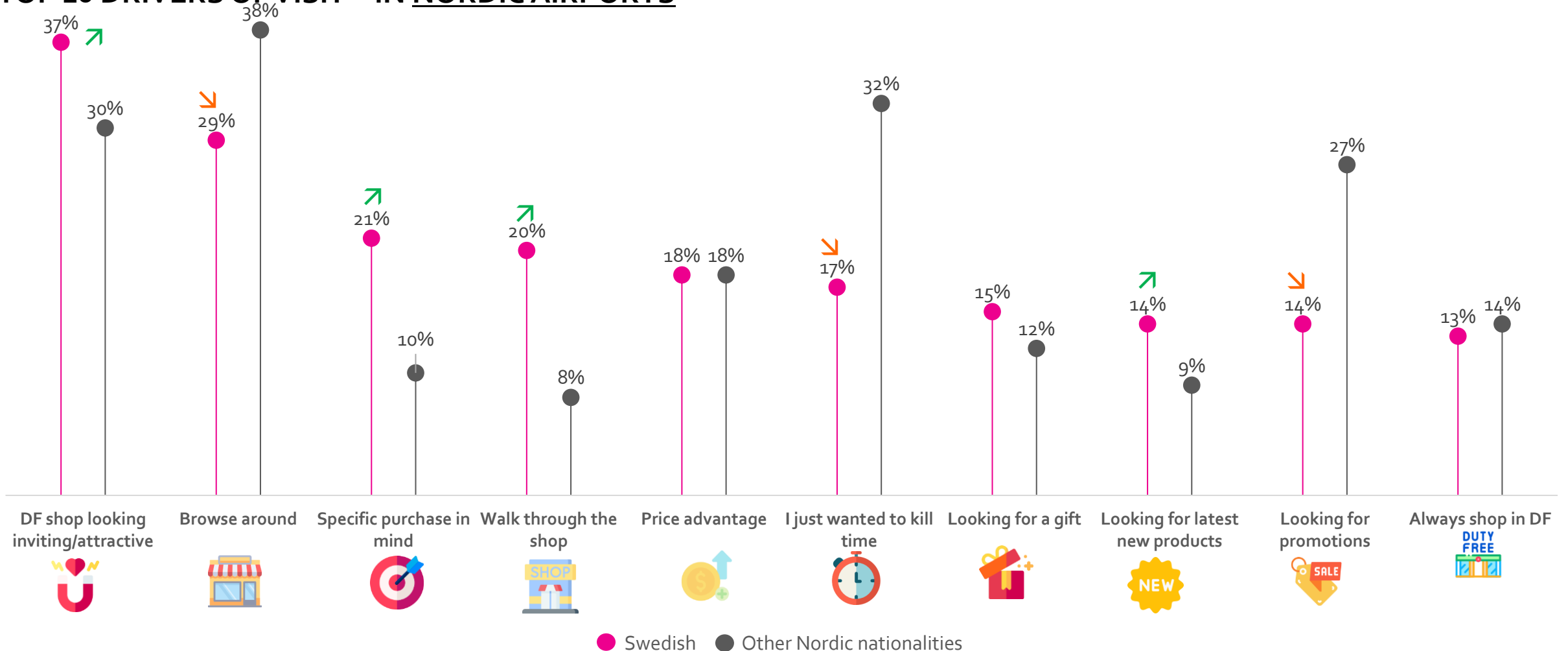
Age Group	Swedish	Other Nordic nationalities
Gen Z	11% ↓	27%
Millennials	31% ↓	39%
Gen X	26%	23%
Boomers	33% ↑	11%
Avg age (y.o.)	47 ↑	39



For Swedes, visits are primarily driven by an appealing store, followed by browsing and specific purchases.



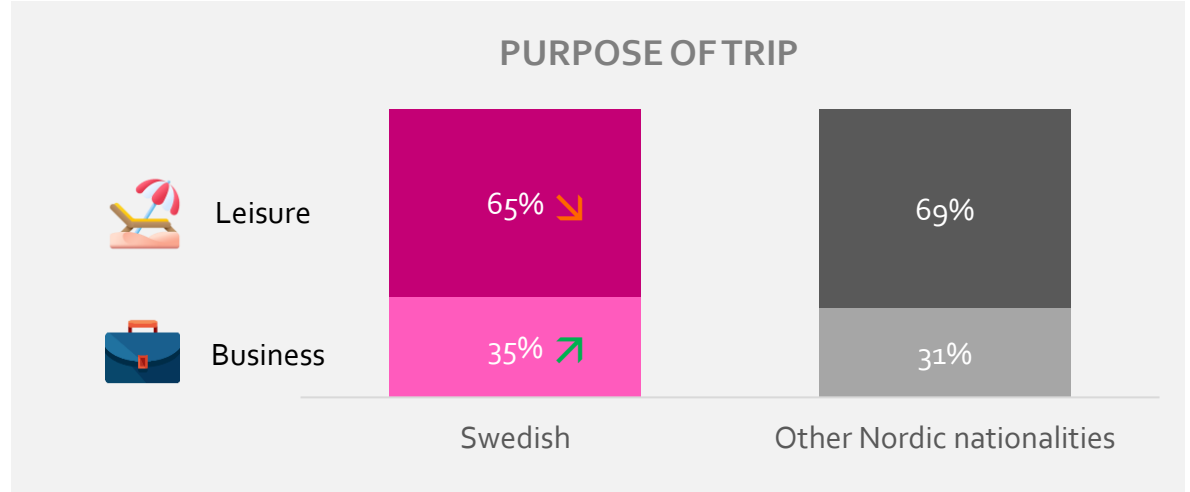
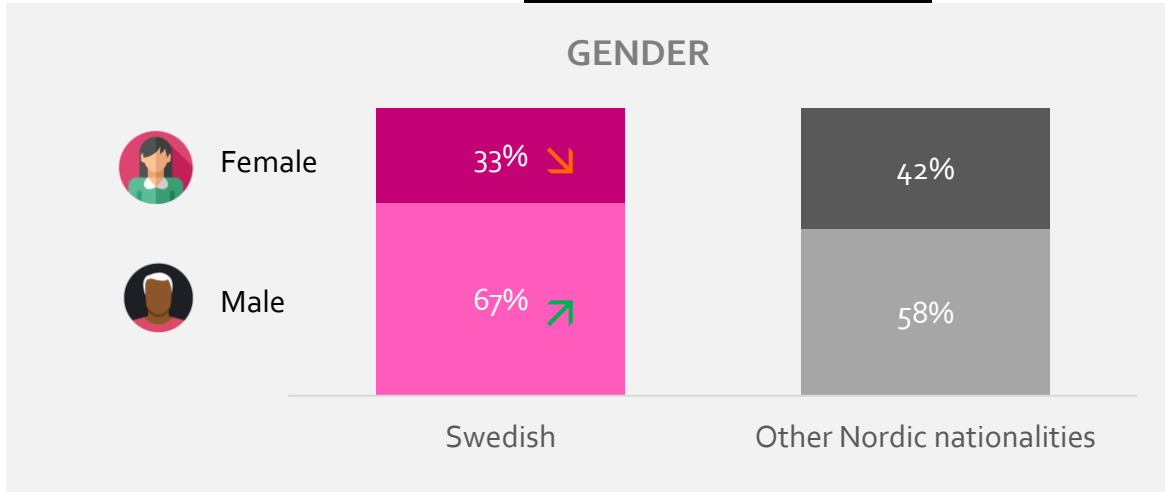
TOP 10 DRIVERS OF VISIT – IN NORDIC AIRPORTS



Swedish duty-free buyers are more often male and older on average. They also tend to travel in premium classes, indicating that Swedish DF buyers have a higher willingness to spend on more comfortable travel.

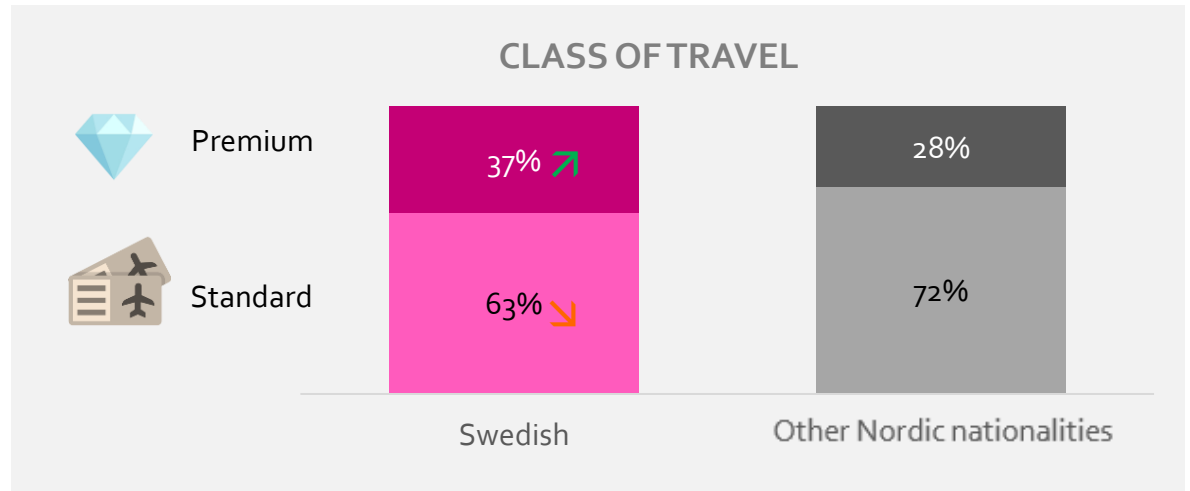


DF BUYERS PROFILE – IN NORDIC AIRPORTS



AGE

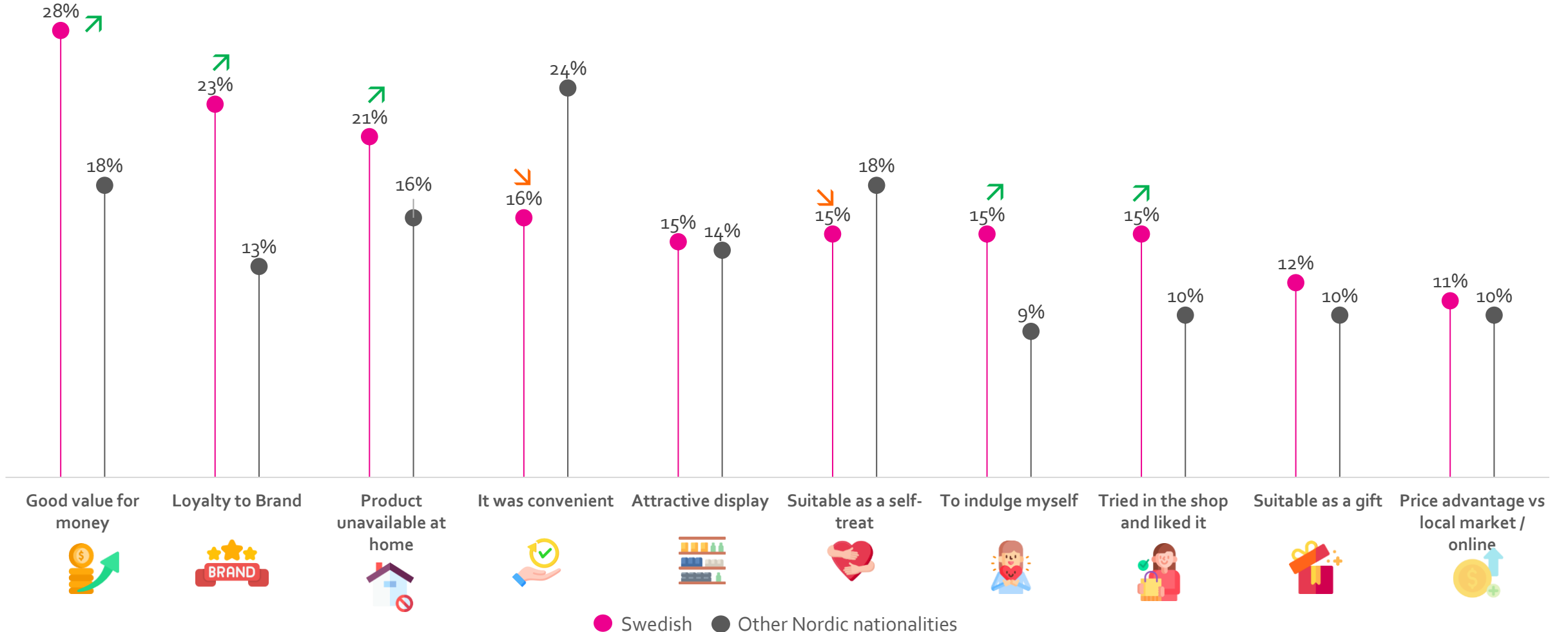
	Swedish	Other Nordic nationalities
Gen Z	7% ↓	19%
Millennials	35%	38%
Gen X	28%	30%
Boomers	30% ↑	14%
Avg age (y.o.)	47 ↑	41



Value for money is the top purchase driver. Swedes additionally prioritize brand loyalty and finding products unavailable at home, showing a brand-led approach. Swedish buyers are also more likely to indulge themselves, and spontaneously buy products they tried in the shop.



TOP 10 DRIVERS OF PURCHASE – IN NORDIC AIRPORTS



Other Nordic nationalities compare prices slightly more often than Swedish travelers, especially with other duty-free stores and online. Swedes also compare prices, but mainly in downtown stores, suggesting that by the time they reach the airport, their purchase decisions are largely made.



PRICE COMPARISON – BUYERS – IN NORDICS AIRPORTS

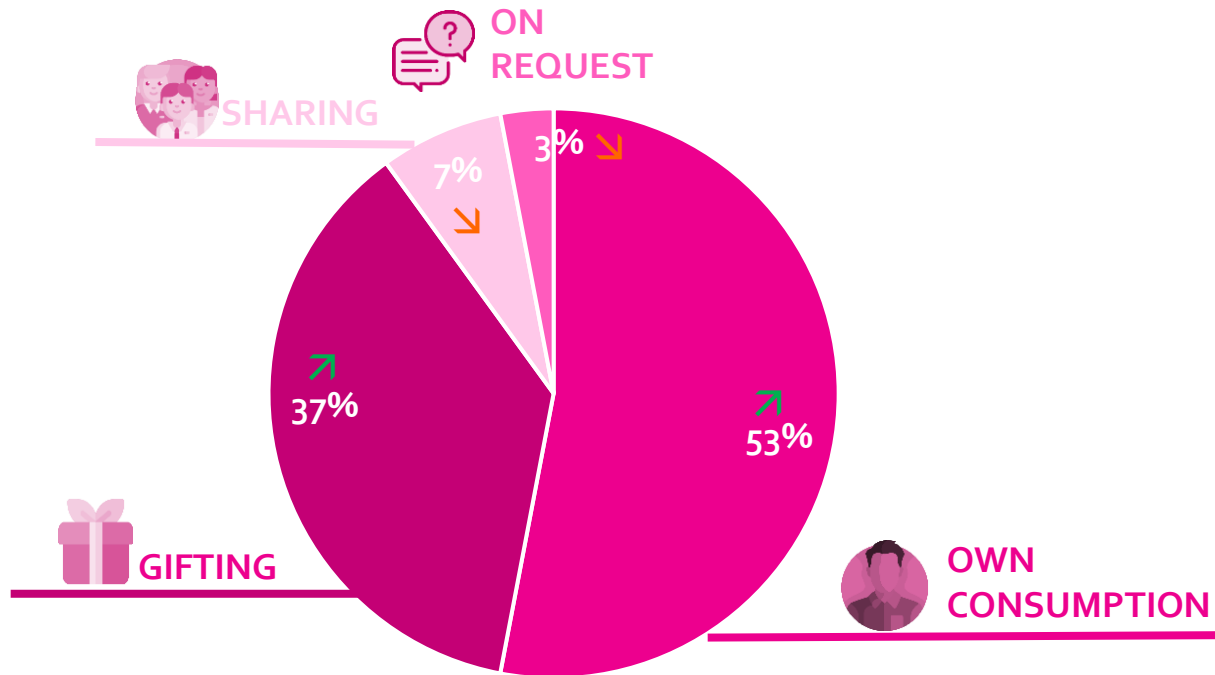


Swedish travelers are primarily driven by personal consumption, followed by gifting, reinforcing the narrative of a more purpose-driven and intentional mindset.

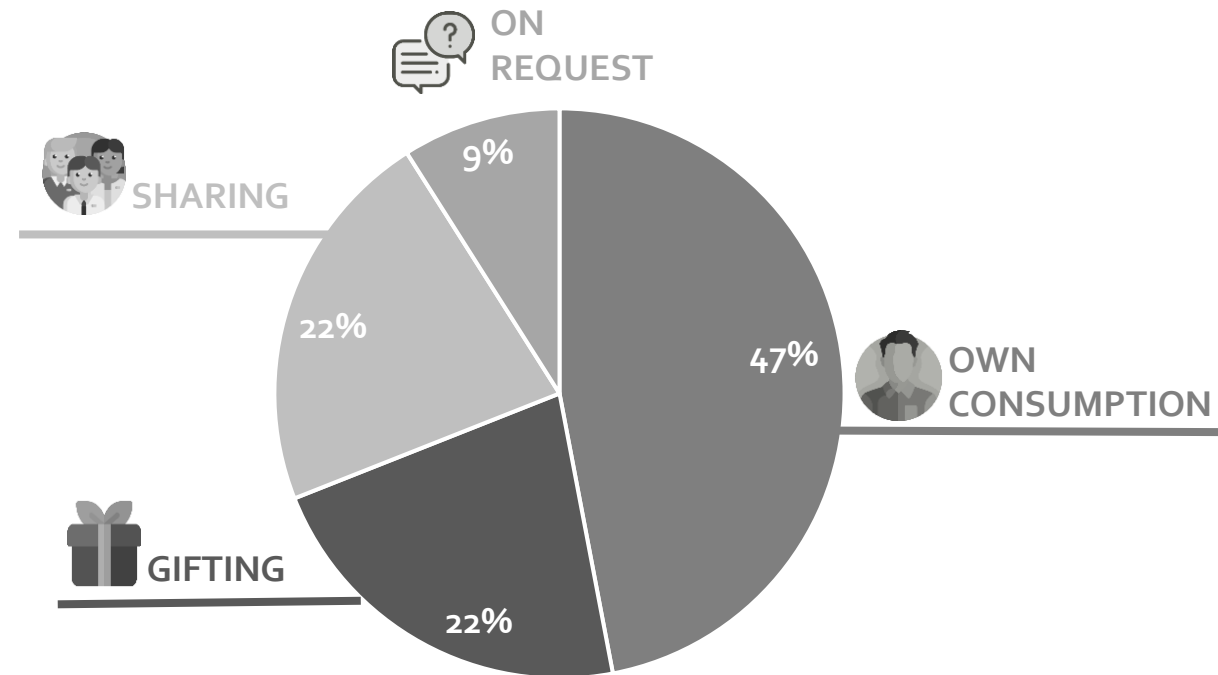


PURPOSE OF PURCHASE – IN NORDIC AIRPORTS

Swedish



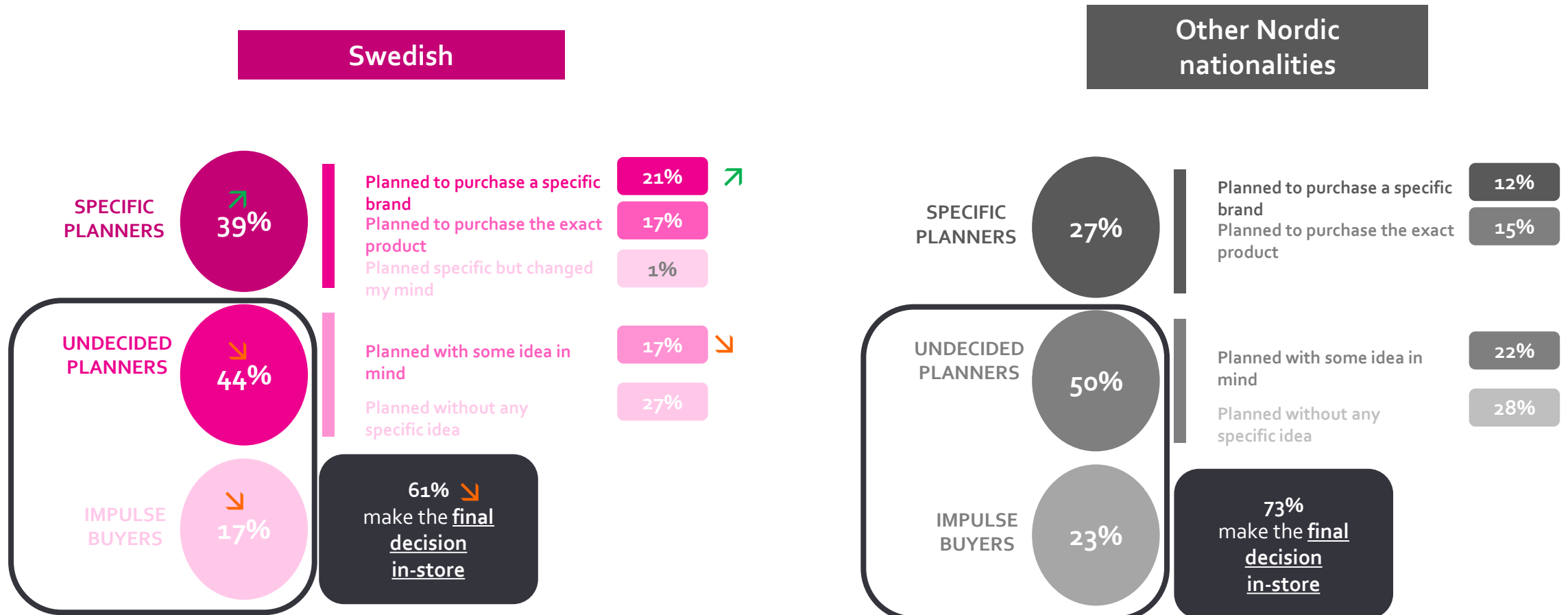
Other Nordic nationalities



Swedes are more specific planners than other Nordics, highlighting the importance of pre-travel communication with Swedish travelers. However, still over 60% make the final decision in-store.



PLANNING LEVELS – IN NORDIC AIRPORTS



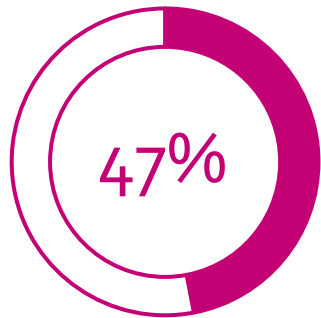
The rate of staff interactions is slightly higher among Swedes, and the influence of these interactions on purchase decisions is even greater compared to other Nordics. This suggests that Swedes take a more fact-driven approach, relying on staff guidance, while other Nordics are more influenced by the shopping environment.



SALES STAFF INTERACTION & INFLUENCE – IN NORDIC AIRPORTS

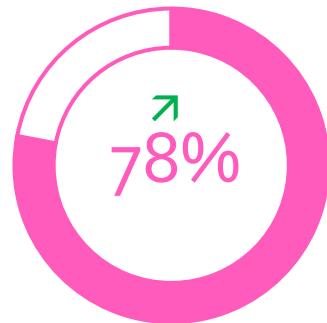
Swedish

INTERACTED
WITH THE
STAFF



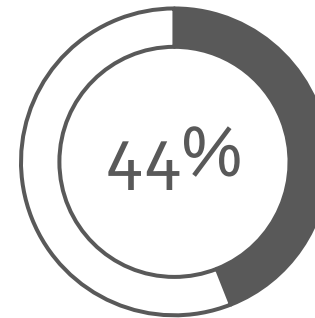
WERE IMPACTED
BY STAFF
INTERACTION

(out of those who interacted)



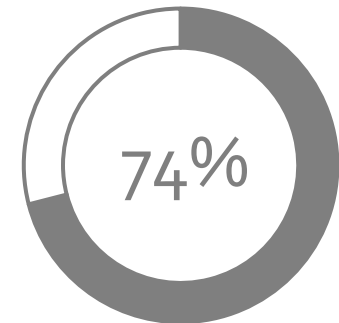
Other Nordic nationalities

INTERACTED
WITH THE
STAFF



WERE IMPACTED
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INTERACTION

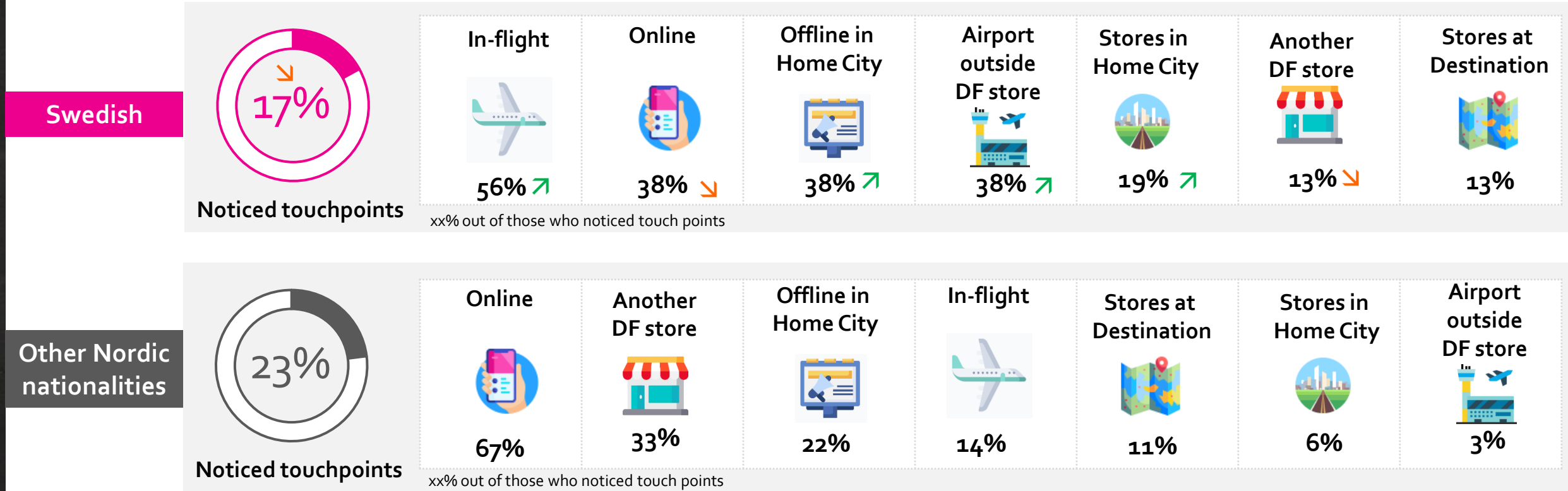
(out of those who interacted)



Swedish travelers notice touchpoints less often compared to other Nordic nationalities, however, when they do, it is primarily in-flight.



TOUCHPOINTS & TOP MOMENTS OF EXPOSURE – IN NORDIC AIRPORTS



OVERVIEW OF KEY FINDINGS: SWEDISH TRAVELERS AT AIRPORTS

1

HIGHER SPEND AMONG SWEDES DESPITE SIMILAR FOOTFALL AND SMALLER CONVERSION

The conversion rate is currently lower among Swedish travelers compared to other Nordic nationalities. However, their average spend is noticeably higher, indicating more intentional and higher-value purchases among Swedes.

2

STRONGER TENDENCY TO SELF-INDULGENCE AND SELF-CONSUMPTION

Swedish travelers are primarily driven by personal consumption, and are also more likely to indulge themselves, and buying products they tried in the shop.

3

LEVERAGE STORE DESIGN TO DRIVE MORE DF VISITS

Swedes are mainly drawn to stores by appealing design, while other Nordics visit both for attractive store design and for casual browsing, passing time, and looking for promotions, emphasizing importance of visually appealing layouts and design to attract visitors.

4

DIFFERENT PURCHASE MOTIVATIONS AMONG NORDICS

Swedes prioritize value for money, being more deliberate shoppers, while other Nordics are driven more by browsing and promotions and exclusives, making them more susceptible to in-store influences.

5

PLANNED AND GOAL-ORIENTED SHOPPERS

Swedes tend to plan their purchases more specifically, highlighting the value of decision making before the store, whereas other Nordic nationalities are more likely to visit spontaneously without a defined purchase plan, with a in-store guidance and inspiration.

6

INTERACTION WITH STAFF PLAYS IMPORTANT ROLE

The rate of staff interactions is slightly higher among Swedes, and the influence of these interactions on purchase decisions is even greater compared to other Nordics

SHOPPING BEHAVIOR ON FERRIES

SWEDISH TRAVELLERS

Although footfall is lower, Swedish shoppers convert more often and spend more on average, highlighting the strong impact of in-store influence.

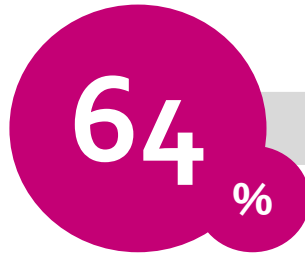


SHOPPING KPIS – IN NORDIC FERRIES

Swedish

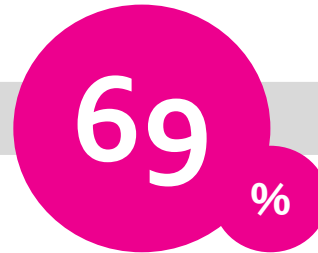
FOOTFALL

(% of DF visitors out of total PAX)



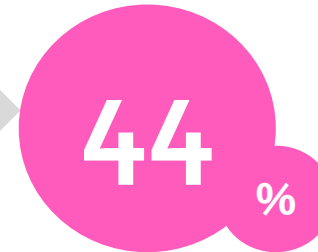
CONVERSION

(% of DF buyers out of DF visitors)



PURCHASE RATE

(% of DF buyers out of total PAX)



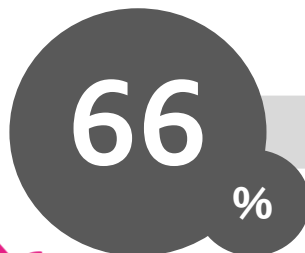
AV SPEND (€)



Other Nordic nationalities

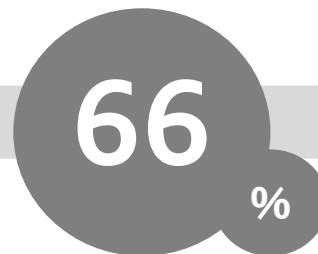
FOOTFALL

(% of DF visitors out of total PAX)



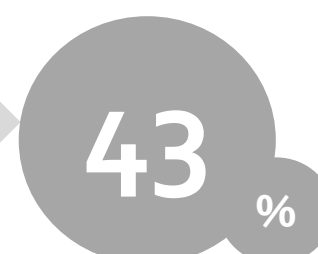
CONVERSION

(% of DF buyers out of DF visitors)



PURCHASE RATE

(% of DF buyers out of total PAX)



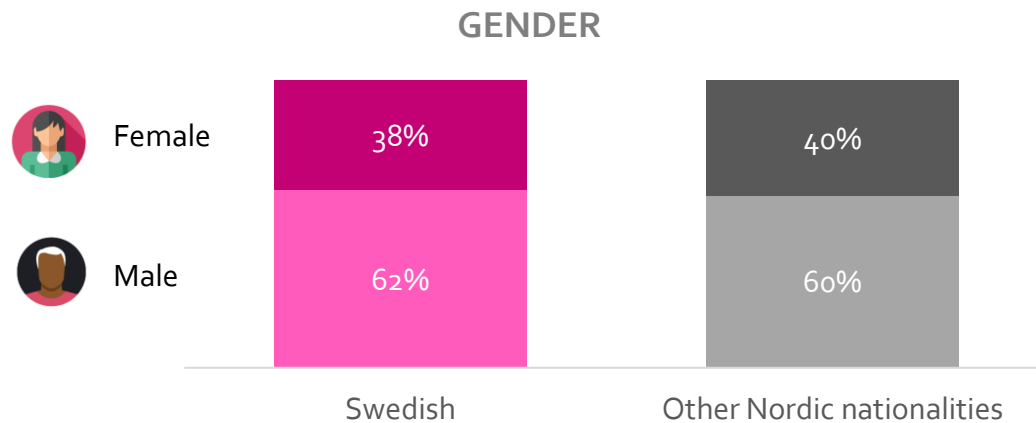
AV SPEND (€)



Nordic visitors are mostly male. Swedes include more Boomers while other Nordics are slightly younger on average, driven by a higher share of Gen Z and Millennials.



VISITOR PROFILE – IN NORDIC FERRIES



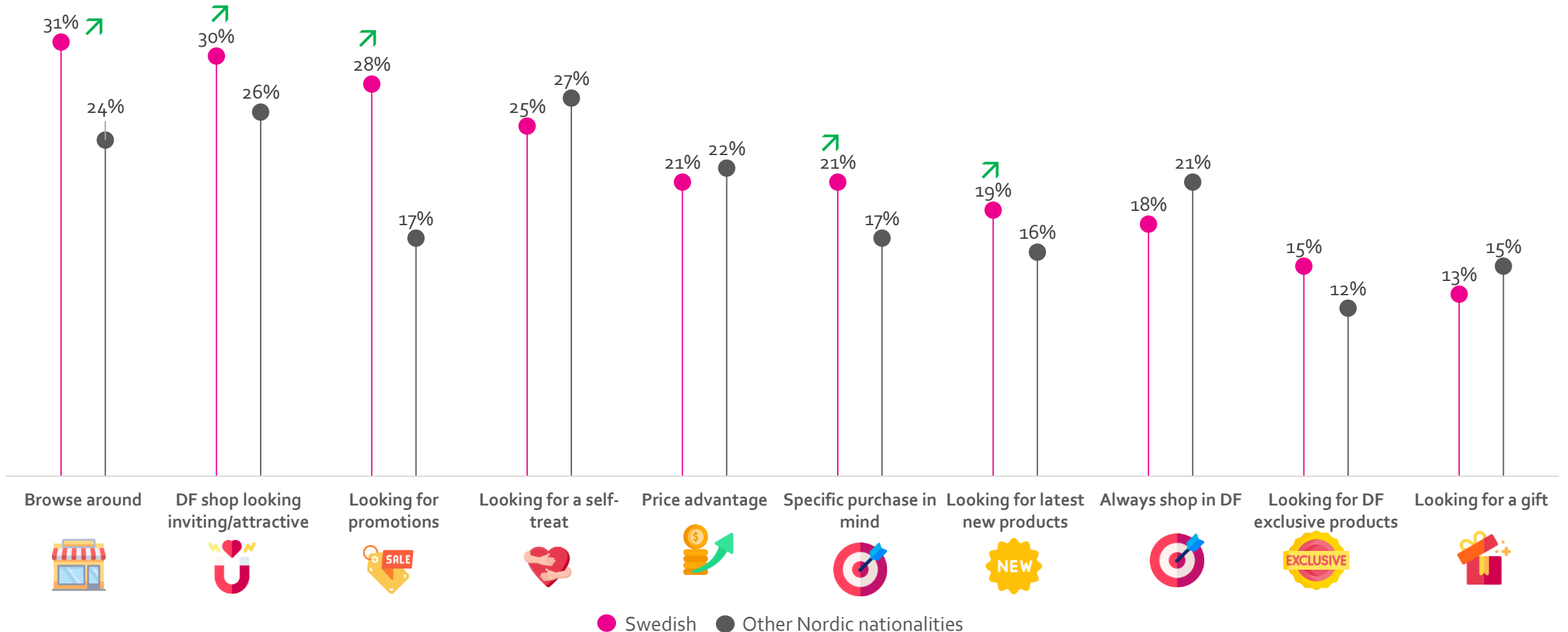
		AGE	
		Swedish	Other Nordic nationalities
Gen Z		4%	8%
Millennials		47%	53%
Gen X		35%	33%
Boomers		15%	6%
Avg age (y.o.)		45 	41



For Swedes, browsing, attractive duty-free shops, and seeking promotions are the main visit drivers, indicating they are open to influence from what they see and are more led by the in-store experience than pre-decided plans.

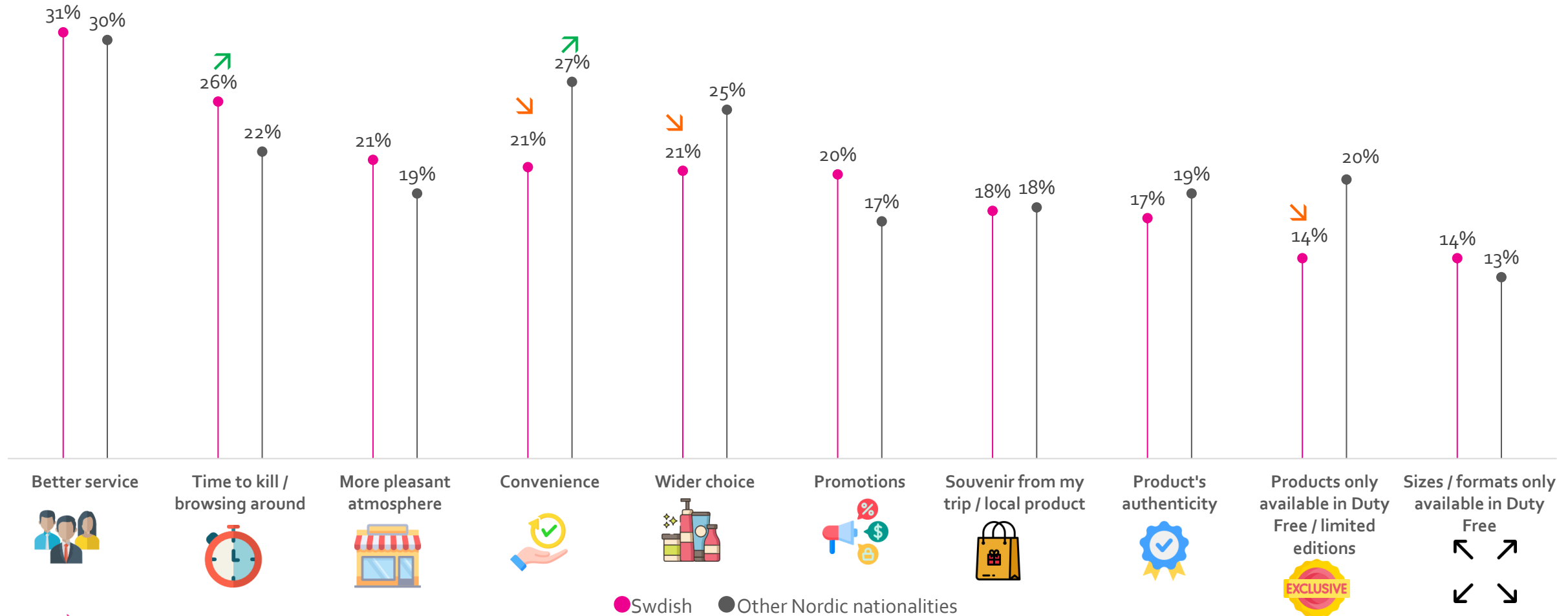


TOP 10 DRIVERS OF VISITS – IN NORDIC FERRIES



Better service is the main appeal factor among all Nordic travelers, followed by time to kill for Swedes and convenience and wider choice for other Nordic nationalities, indicating that beyond service, Swedes are influenced by situational factors, whereas other Nordics respond more to practical benefits.

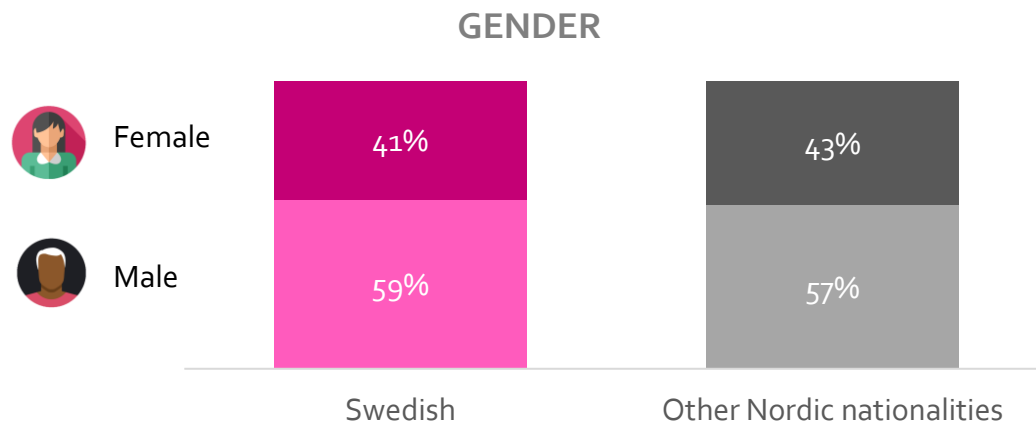
DUTY FREE APPEAL FACTORS - IN NORDIC FERRIES



Nordic buyers are predominantly male. Swedish buyers skew more toward Boomers, while other Nordic buyers are slightly younger on average, driven by a higher share of Gen Z and Millennials, in line with their overall visitor profile.



BUYERS PROFILE – IN NORDIC FERRIES

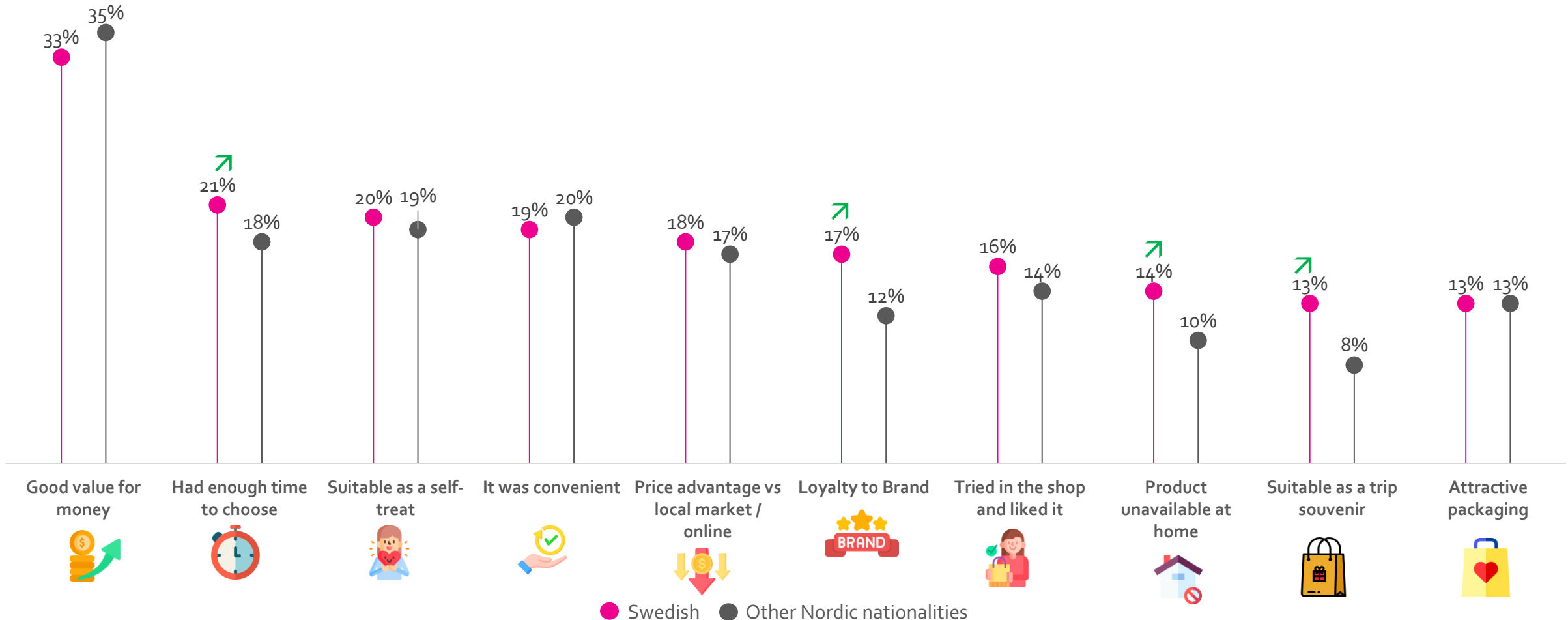


		AGE	
		Swedish	Other Nordic nationalities
Gen Z		3% ↘	7%
Millennials		46% ↘	55%
Gen X		35%	31%
Boomers		16% ↗	7%
Avg age (y.o.)		45 ↗	41

Value for money is the main purchase driver among all Nordic travelers, followed by having enough time to choose, self-indulgence, and convenience, showing the importance of highlighting value alongside creating a convenient and enjoyable shopping experience.



TOP 10 DRIVERS OF PURCHASE – IN NORDIC FERRIES

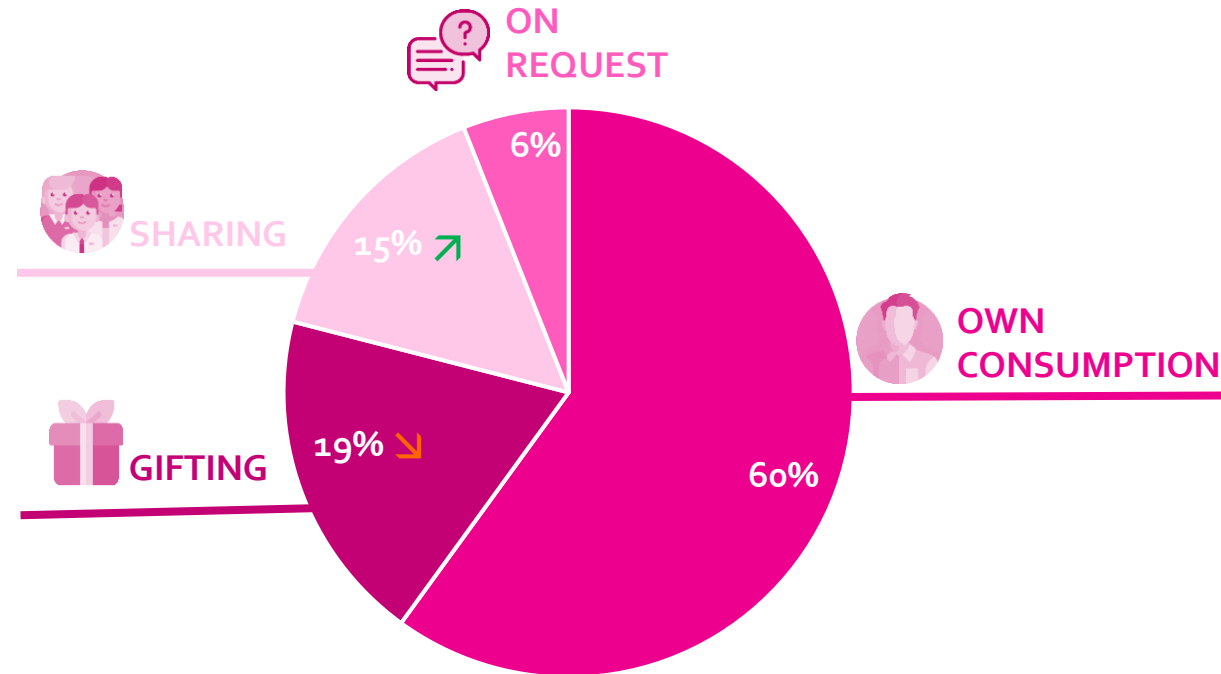


All Nordic travelers mainly purchase for their own use, while Swedes tend to buy more for sharing. On-request purchases are low in both groups, indicating that social motivations differ by group, but personal use remains dominant.

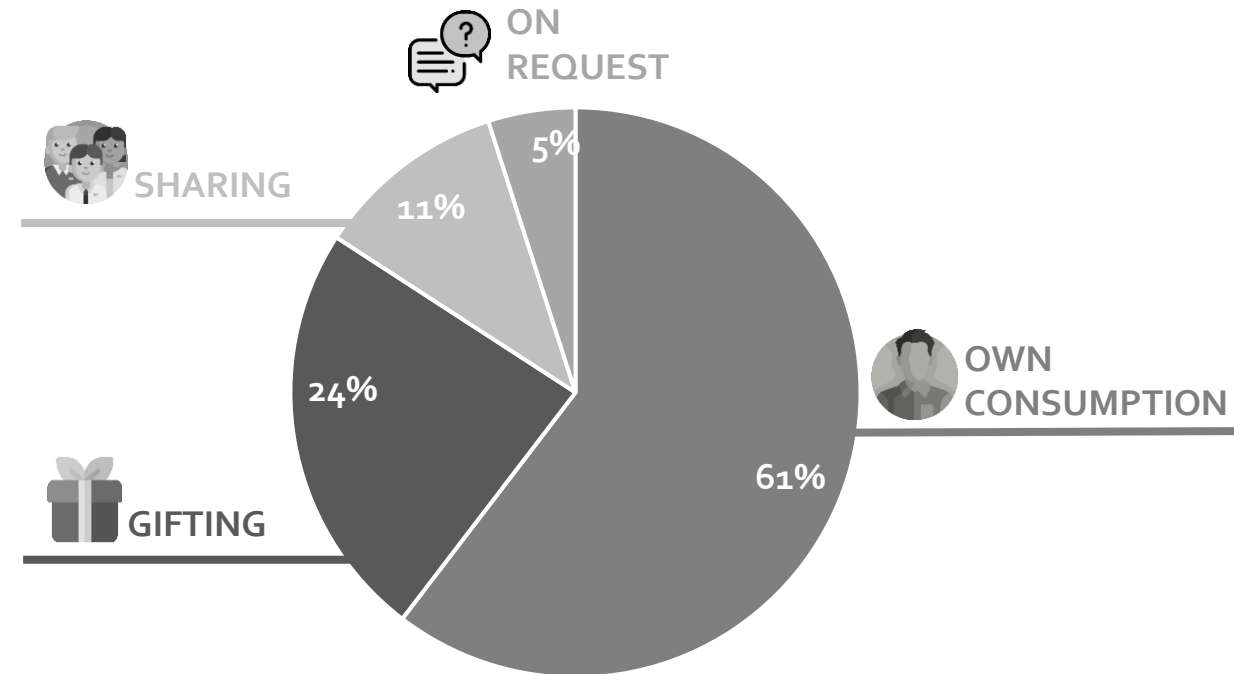


PURPOSE OF PURCHASE – IN NORDICS FERRIES

Swedish



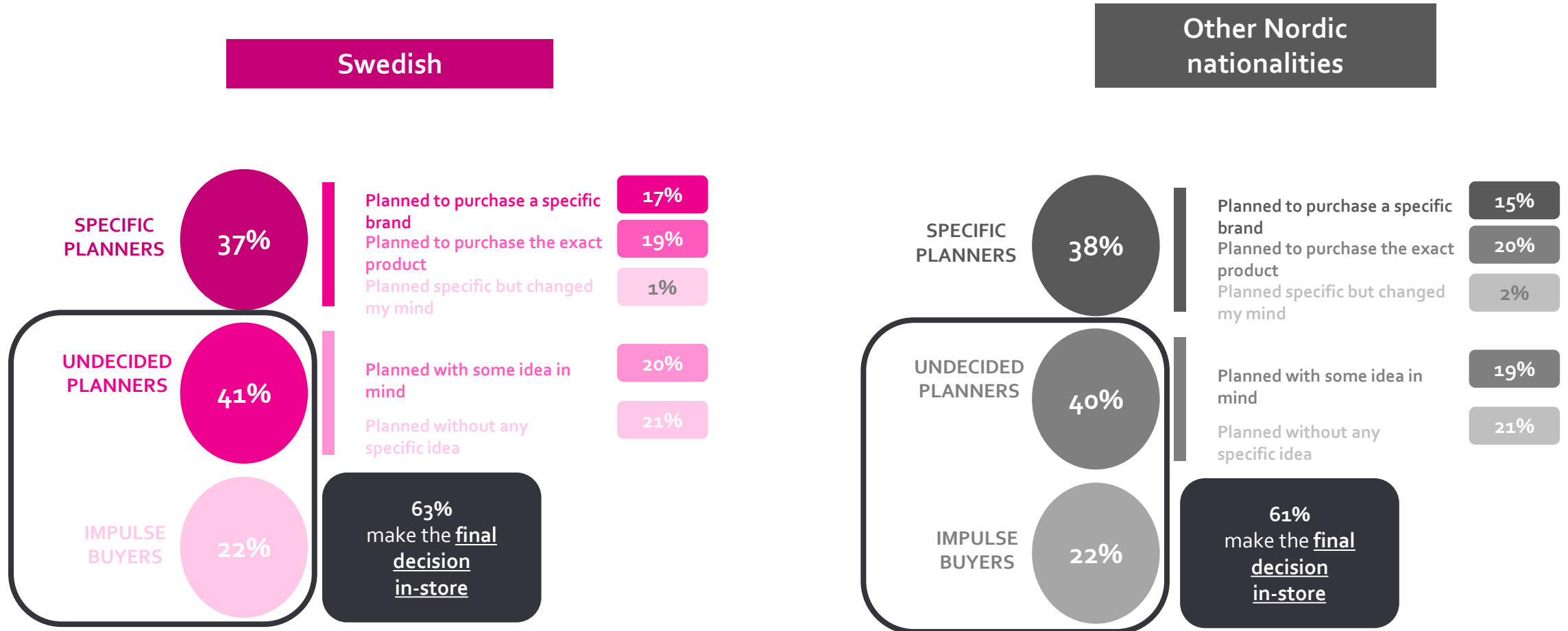
Other Nordic nationalities



Swedish travelers are primarily undecided planners, with a high share of impulse purchases, highlighting the importance of engagement and in-store influence on their buying decisions.



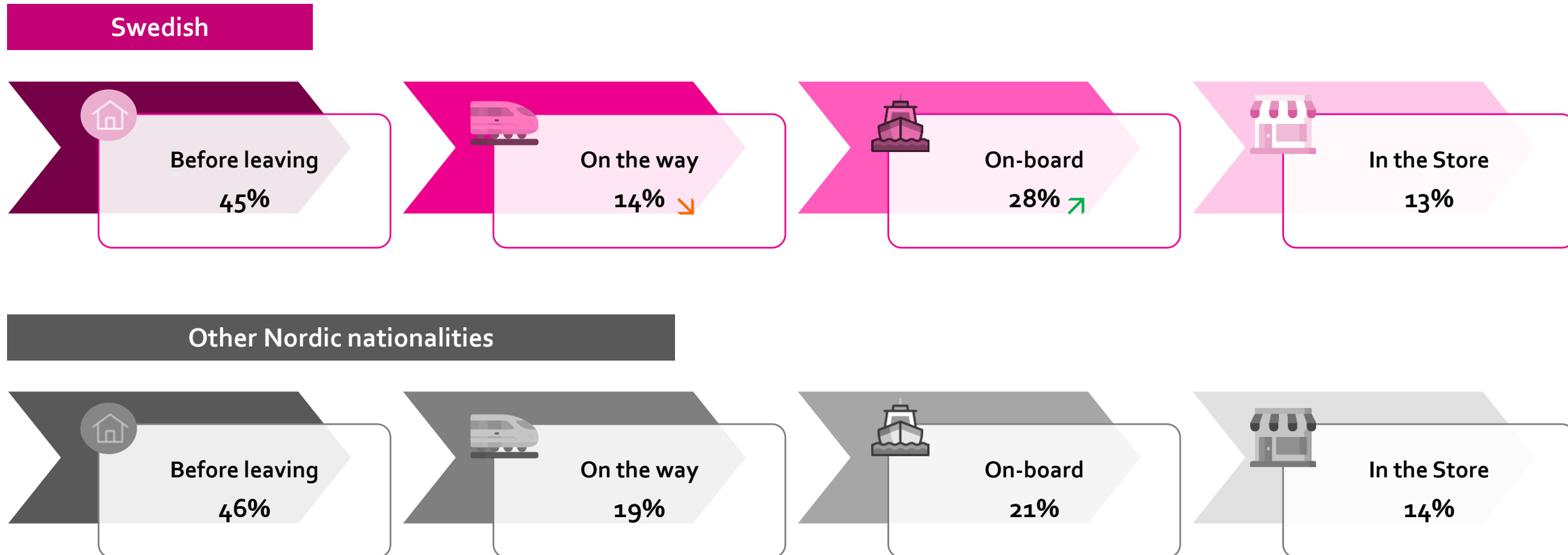
PLANNING LEVELS – IN NORDIC FERRIES



Most Swedish travelers make their purchase decisions before leaving home; however, among those who do not, a larger share of Swedish travelers decide often on board, once again highlighting the role of influence-driven decision-making among Swedes.



MOMENT WHEN DF BUYERS START TO THINK ABOUT THEIR SPECIFIC PURCHASE - IN NORDIC FERRIES



Swedish travelers are more influenced by staff, although interacting less compared to other Nordics. Engaging interactions remain key to driving Swedes' purchases.



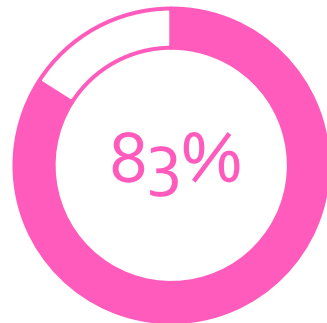
SALES STAFF INTERACTION & INFLUENCE – IN NORDIC FERRIES

Swedish

INTERACTED
WITH THE
STAFF

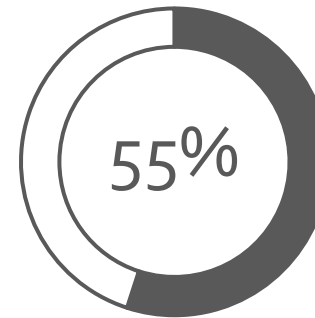


WERE IMPACTED
BY STAFF
INTERACTION
(out of those who interacted)

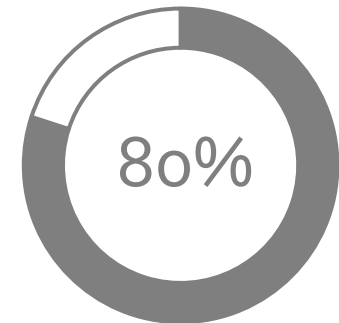


Other Nordic nationalities

INTERACTED
WITH THE
STAFF



WERE IMPACTED
BY STAFF
INTERACTION
(out of those who interacted)



Swedish travelers show similar behaviors compared to other Nordic nationalities: comparable likelihood to purchase products on promotion, similar openness to trying new products, and alike preference for unique or duty-free exclusive items, suggesting they are receptive to new offerings and in-store influences.



PURCHASES OF PROMOTIONS, FIRST TIME BUYERS & DF EXCLUSIVES – IN NORDICS FERRIES



PURCHASES OF PRODUCTS ON PROMOTION



PURCHASES OF PRODUCTS NEVER BOUGHT BEFORE
(FIRST TIME BUYERS)



PURCHASES OF UNIQUE / DF EXCLUSIVE PRODUCTS

Swedish

50%

56%

50%

Other Nordic nationalities

48%

57%

49%

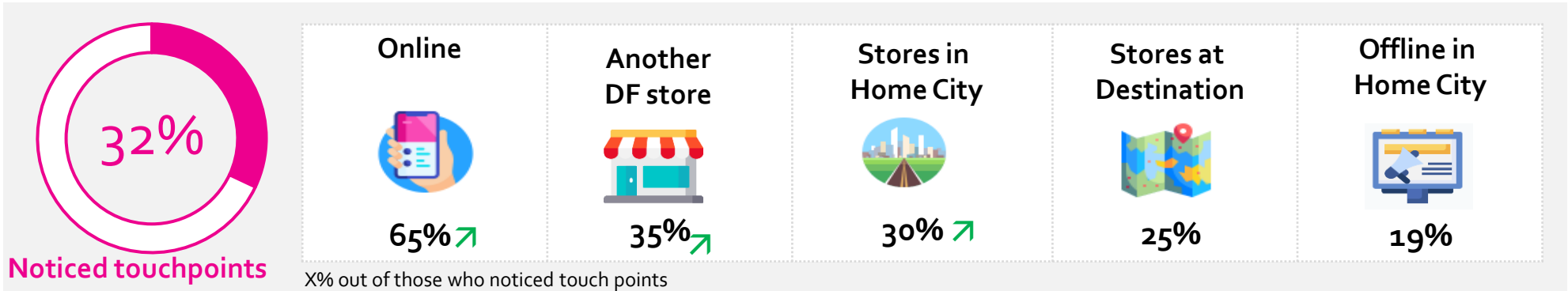


The recall of touch points is slightly lower among Swedish travelers. However, they notice Online touch points and another DF store points more intensively, highlighting the need to leverage these channels to capture their attention early.

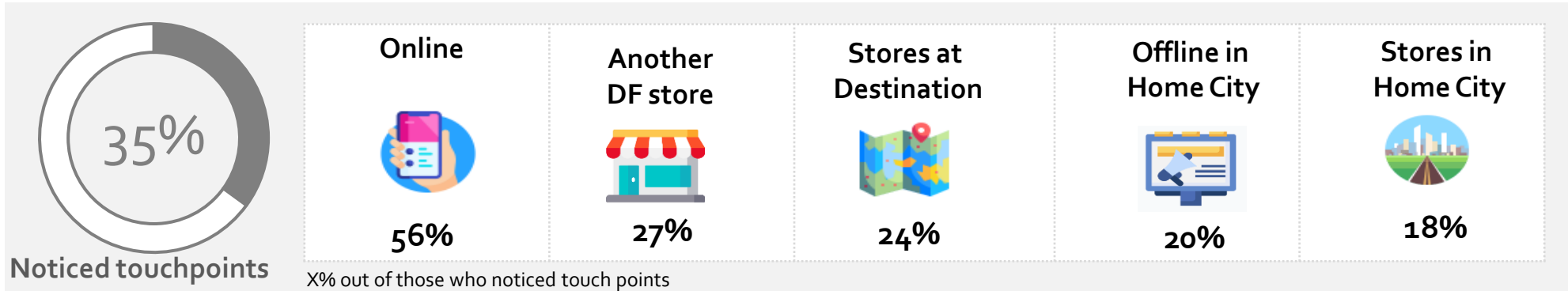


TOUCHPOINTS & TOP MOMENTS OF EXPOSURE – IN NORDIC FERRIES

Swedish



Other Nordic nationalities



OVERVIEW OF KEY FINDINGS: SWEDISH TRAVELERS ON FERRIES

1 INTERACTION DRIVES CONVERSION

Despite the lower footfall, Swedish shoppers have higher conversion rate leading to higher average spend indicating the importance of in-store influence for Swedish shoppers.

2 LEVERAGING STORE DESIGN AND EXPERIENCE FOR SWEDISH TRAVELERS

Swedes enter stores with less defined expectations and are often drawn by shop appeal, browsing, and promotions, creating an ideal opportunity for experiential shopping to drive results.

3 DIFFERENCE IN TRAVELERS PROFIL

Most ferry travelers are male, with Swedes skewing older than other nationalities.

4 THE IMPULSIVE AND UNDECIDED NORDIC TRAVELERS

Nordic travelers are largely undecided planners, with a significant share of impulse purchases, underscoring the critical role of engagement and in-store influence in shaping their buying decisions.

5 SWEDISH SHOPPERS RESPOND TO STAFF INFLUENCE

Swedish travelers are highly influenced by staff, and even though other Nordics engage in interactions more frequently, meaningful staff engagement is essential for driving Swedish travelers' purchases.

6 SIMILAR PURCHASE BEHAVIORS ACROSS NORDIC TRAVELLERS

Swedish and other Nordic travelers show similar purchase behavior, openness to new products, and preference for unique or duty-free exclusive, suggesting that both groups share a common mindset toward novelty and exclusivity.



KEY FINDINGS

KEY FINDINGS



AIRPORTS

- **Value for money is the key driver for Swedish travelers in airports**, and while appealing store design attracts them, they remain highly specific planners with a clear purchase intention before entering.
- They make **informed, deliberate, and well-considered decisions**, typically knowing the product or category in advance, which results in a higher average spend.
- Compared to more exploratory shoppers, they **notice fewer touchpoints and are less influenced by promotions or in-store stimuli**, relying mainly on their own judgment.
- Overall, they display a **focused, rational, and self-directed shopping behavior** in airport environments.



FERRIES

- Swedish ferry travelers are strongly driven by price and value, with appealing shop design and promotions effectively attracting them into stores.
- They often enter with **less clearly defined expectations**, showing a more relaxed mindset and greater openness to browsing.
- Their purchases are **largely unplanned**, reflecting a more exploratory and spontaneous shopping style.
- Compared to airport behavior, they are **more receptive to staff interaction and influence** during the purchase process.
- They show **openness to new products and interest in unique or duty-free exclusives**, with impulse purchases representing a meaningful share.

AIRPORT VS FERRY

Swedes are highly planned, self-directed shoppers in airports, arriving with specific purchase intentions and showing little influence from their surroundings. On ferries, however, they adopt a more relaxed approach, browsing with a general idea in mind and being more responsive to in-store cues and staff guidance when making final decisions.



Thank you!

