



Nordic Travel
Retail Group

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Nordic Travel Retail Seminar

Copenhagen
June 2026



m1ndset
RESEARCH BEYOND BORDERS

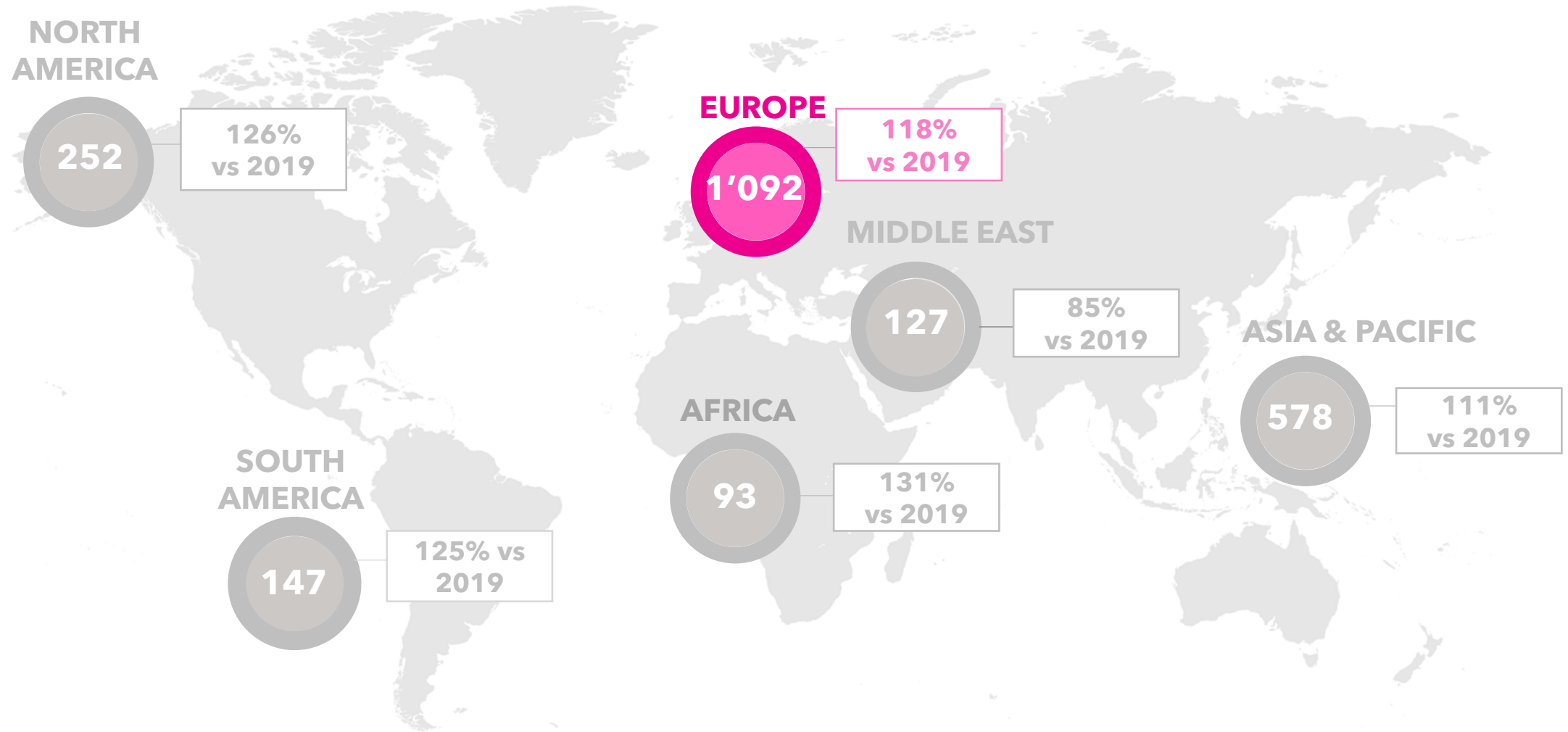




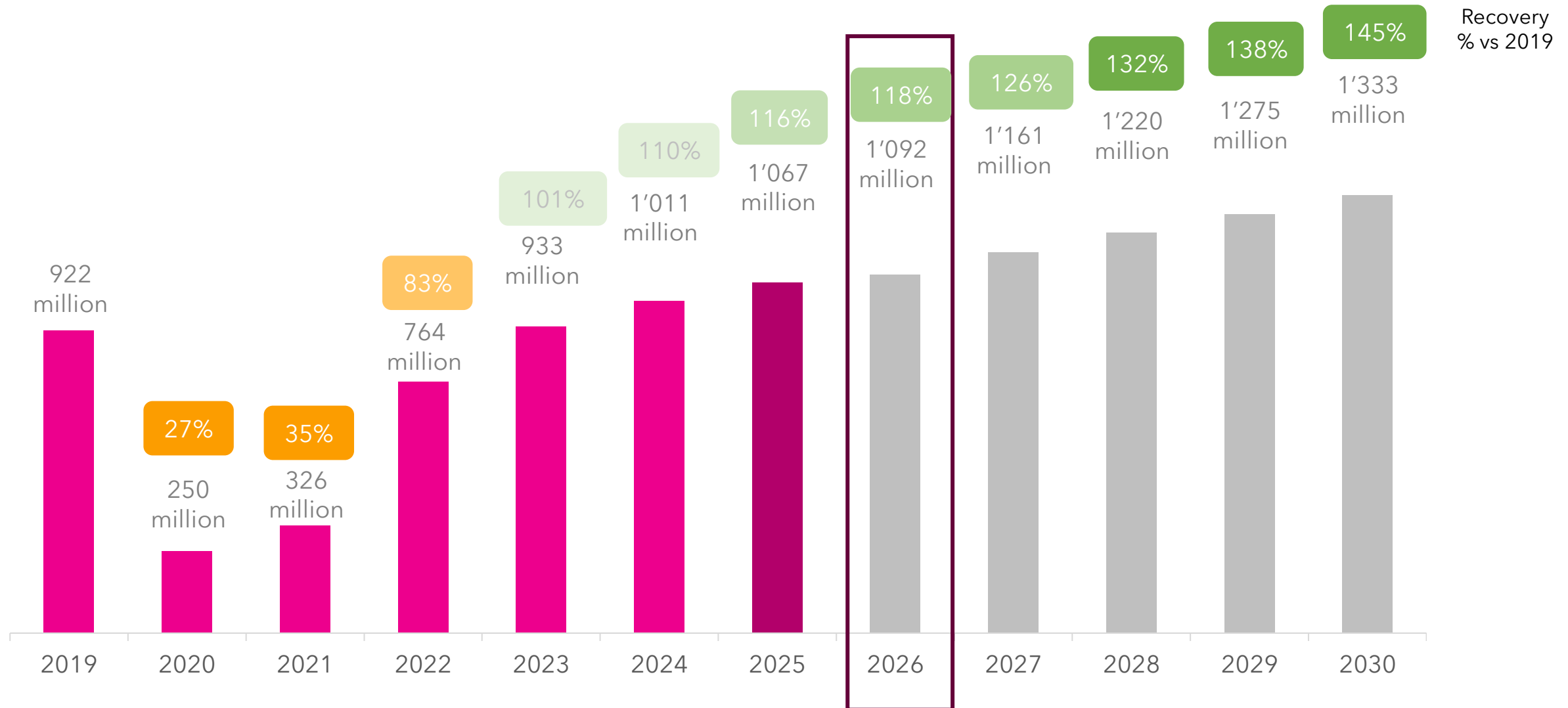
GLOBAL AIR TRAFFIC EVOLUTION

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RESEARCH BEYOND BORDERS

2026 INTERNATIONAL DEPARTURES BY REGIONS



EUROPEAN INTERNATIONAL DEPARTURES

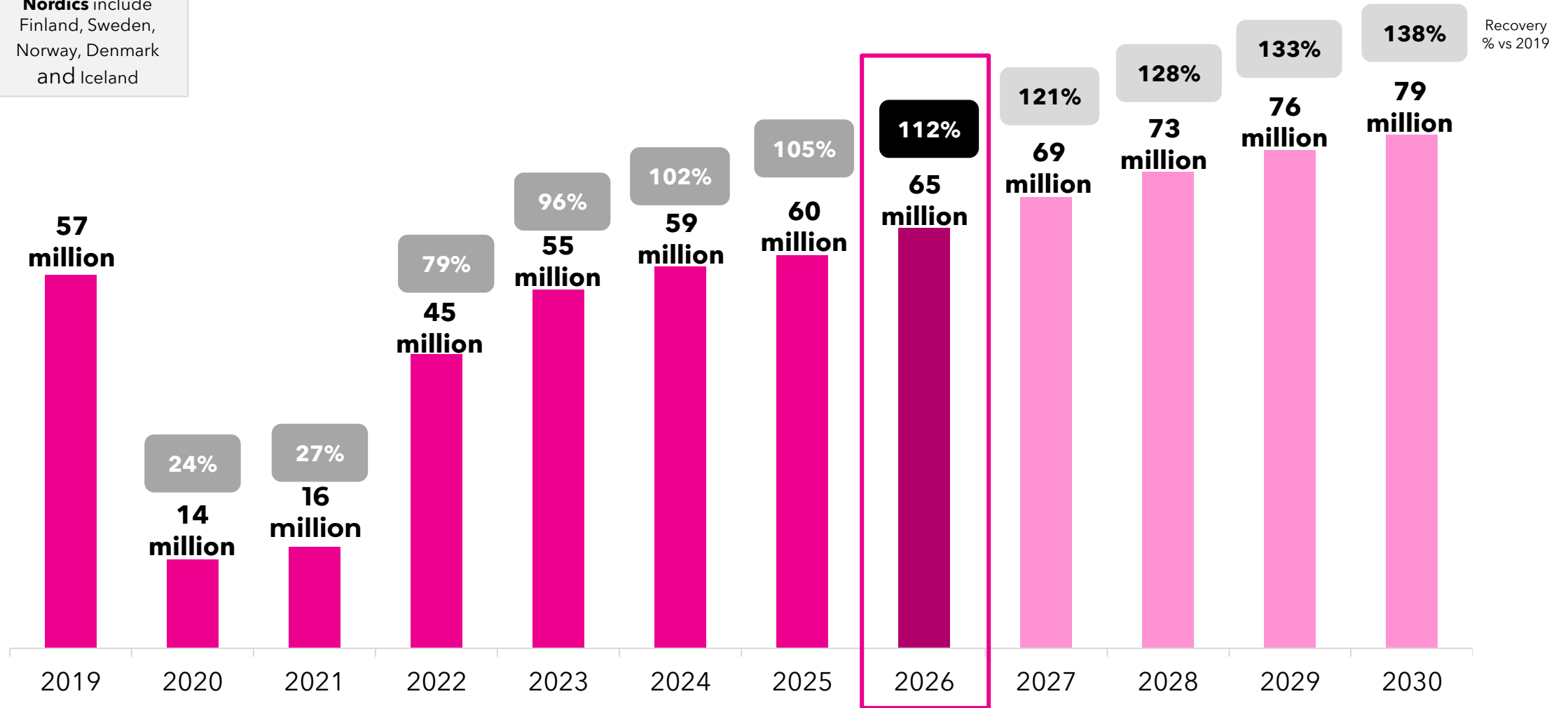




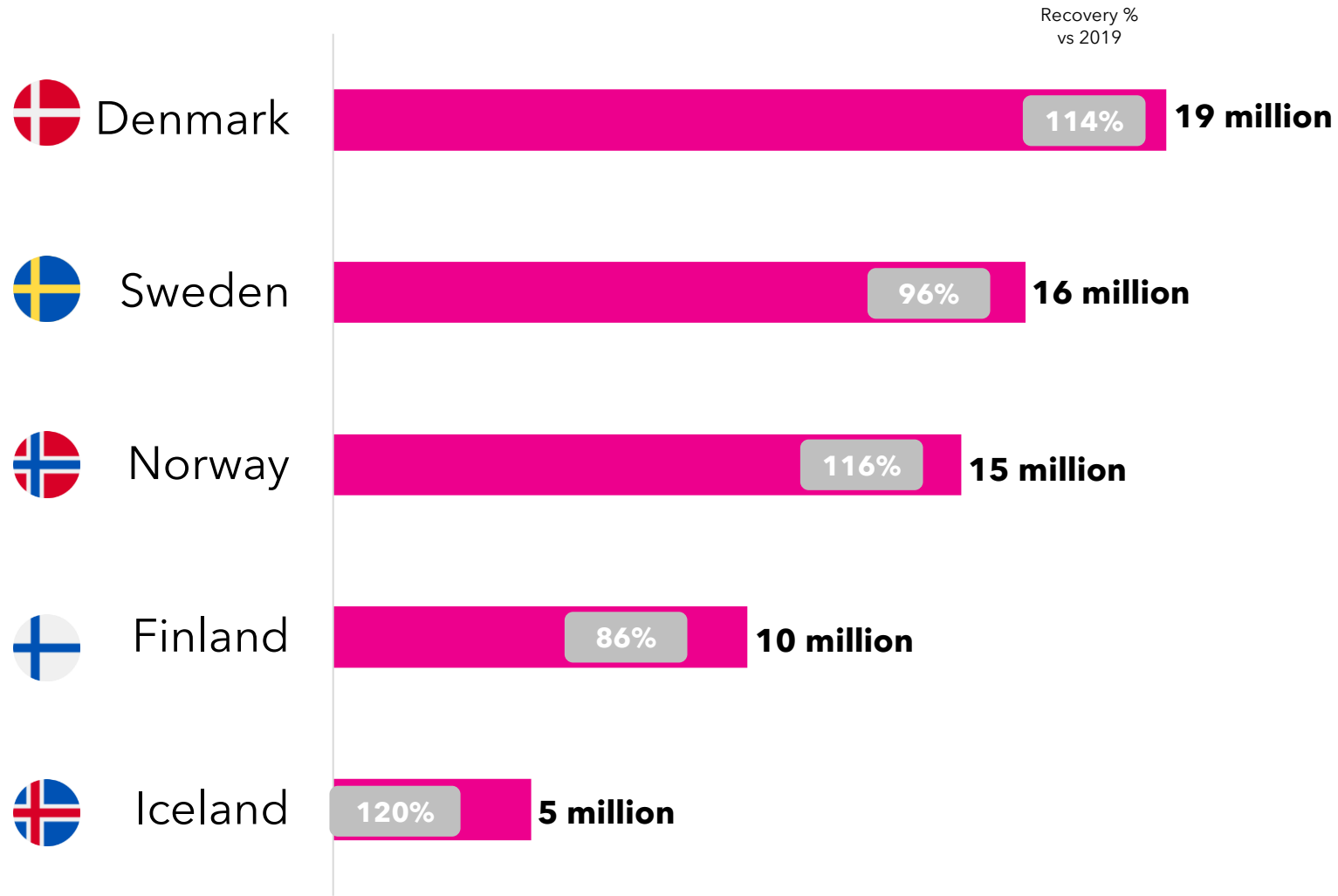
AIR TRAFFIC EVOLUTION IN THE NORDICS

NORDICS INTL DEPARTURES

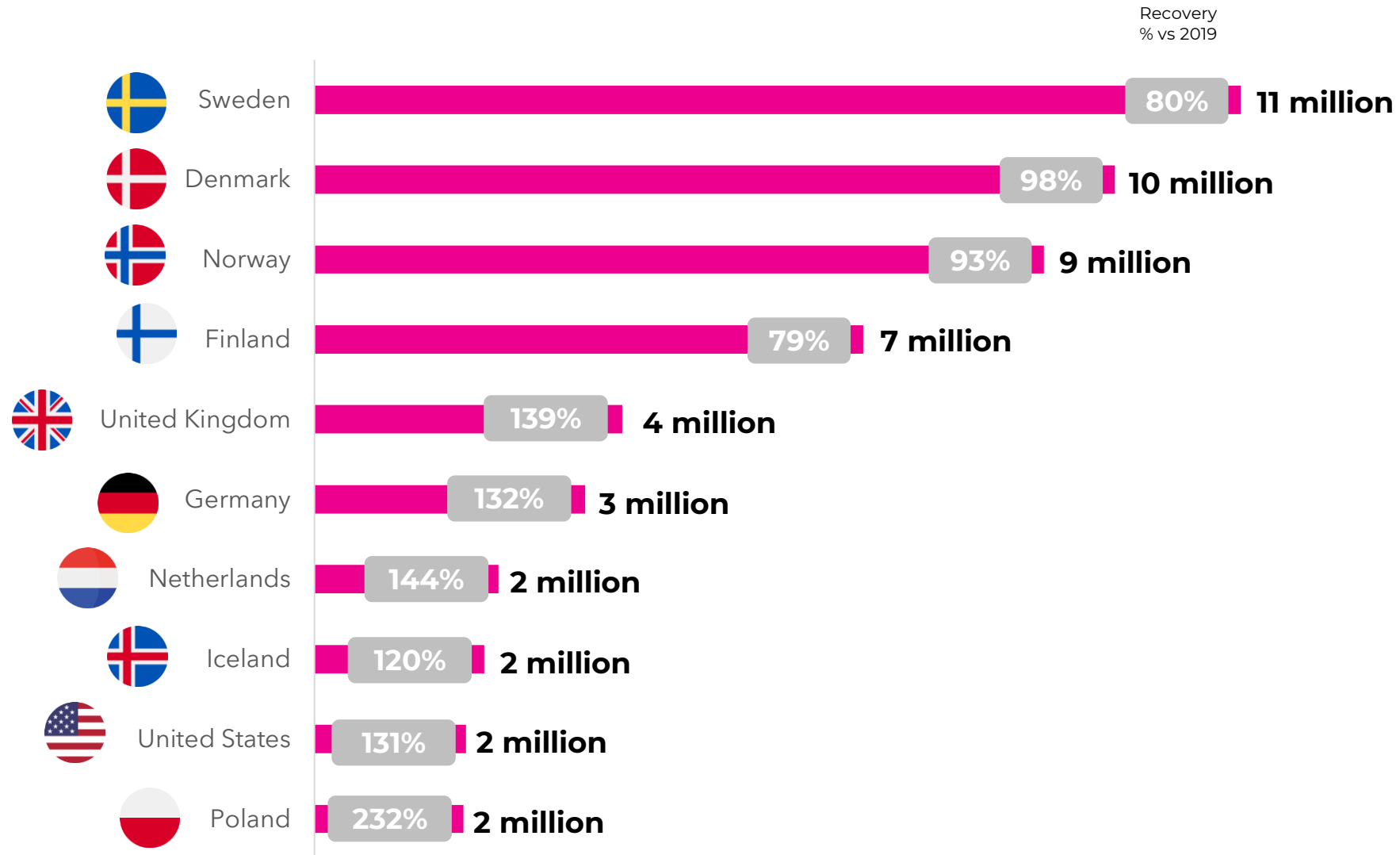
Nordics include Finland, Sweden, Norway, Denmark and Iceland



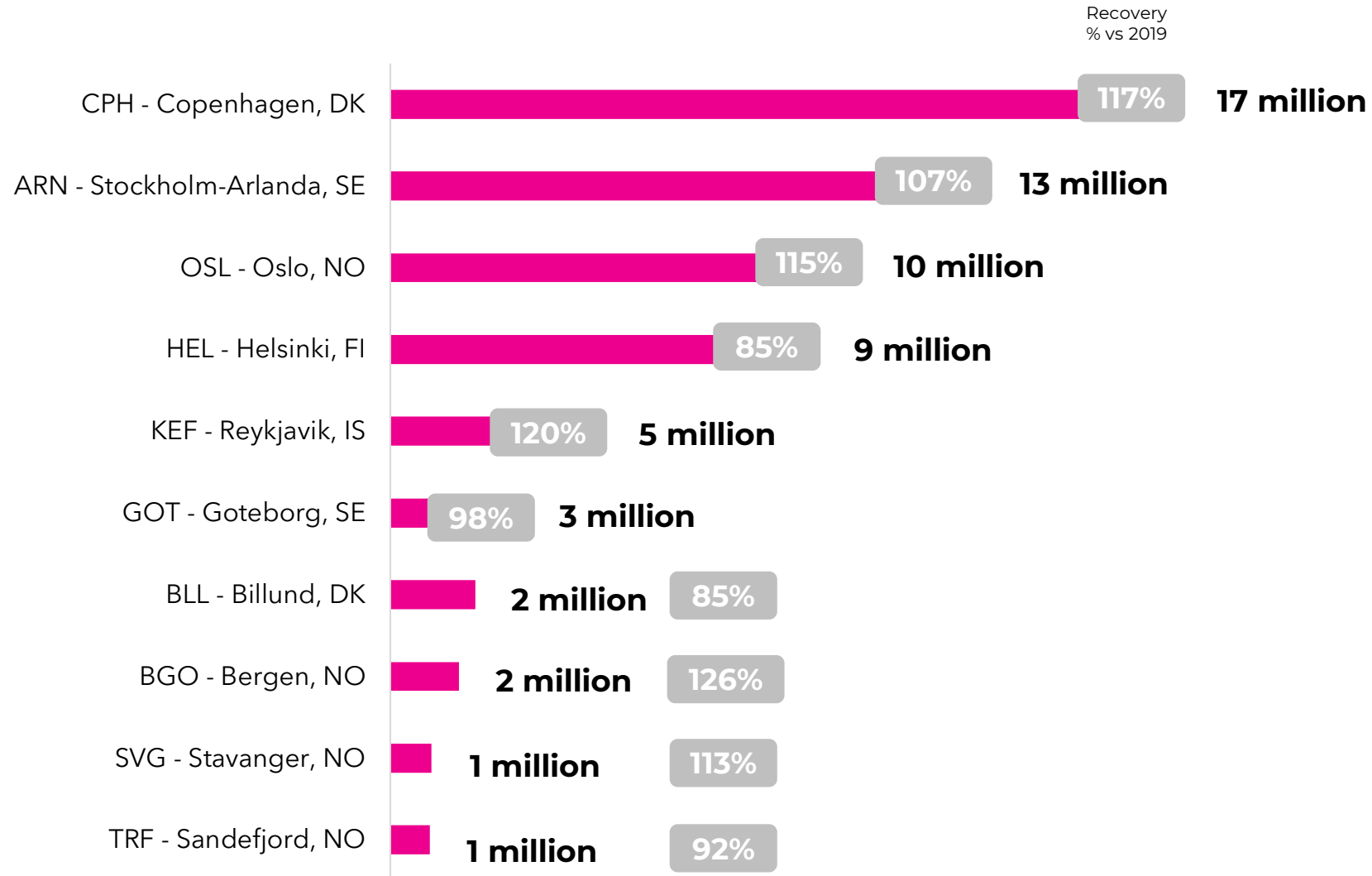
2026 INTL TRAFFIC NORDICS COUNTRIES



TOP NATIONALITIES 2026 AT NORDICS AIRPORTS (INTL)



TOP INTL AIRPORTS 2026 IN THE NORDICS

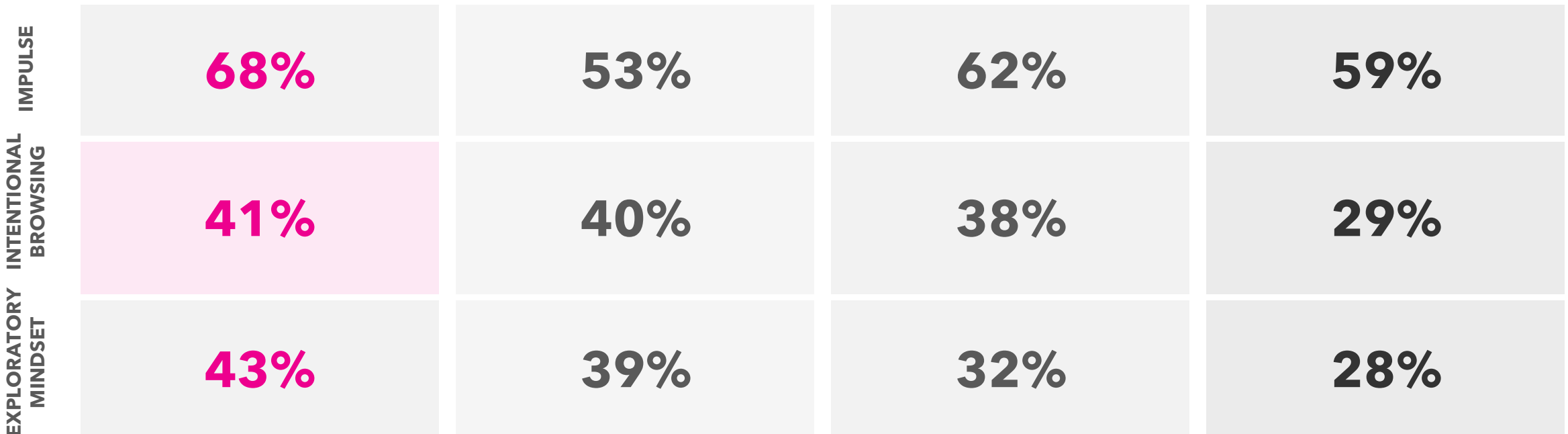




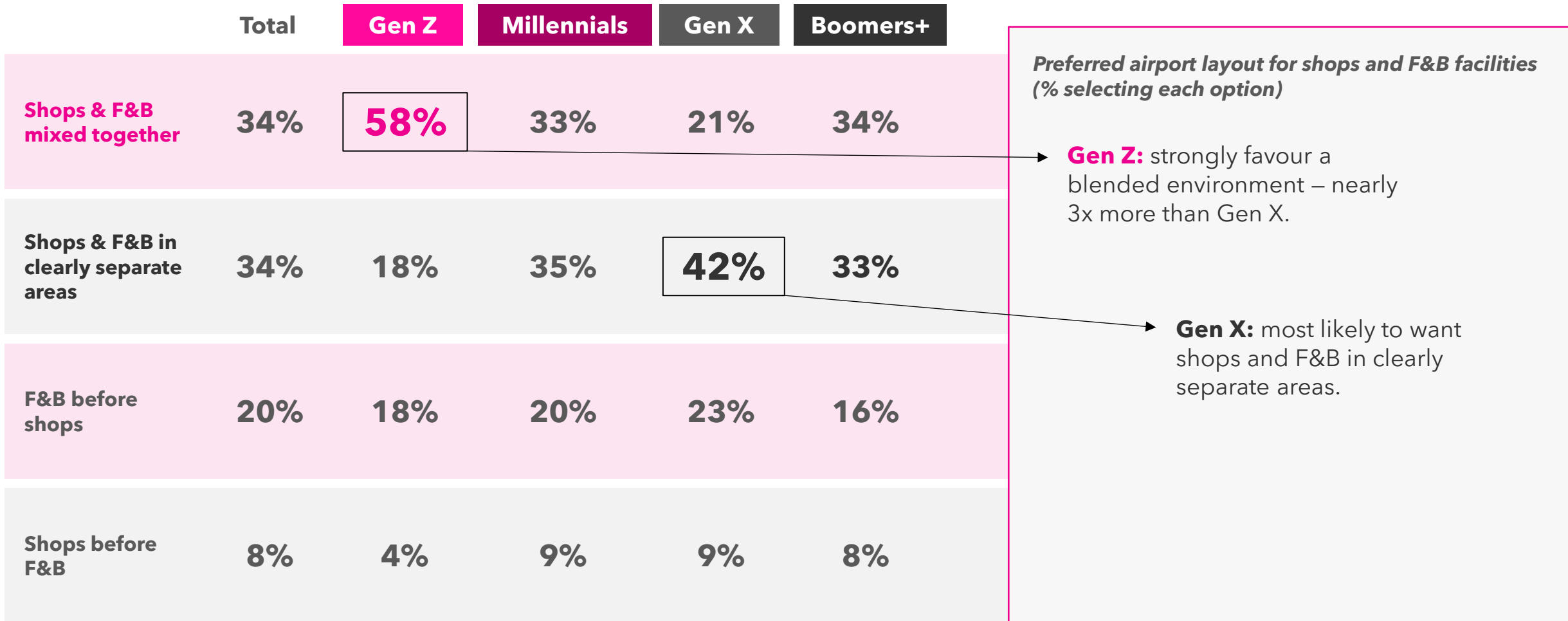
**Different
Generations in the
Airports in the
Nordics:**
How do they browse
across areas?

GEN Z SHOW THE STRONGEST DUAL-VISIT AND IMPULSE-BUYING POTENTIAL.

Dual Visitors (Retail & F&B)



GEN Z WANTS A MIXED ENVIRONMENT; OLDER GENERATIONS PREFER SEPARATE ZONES.



GEN Z LEADS APPETITE FOR HYBRID RETAIL-F&B CONCEPTS ACROSS MOST CATEGORIES.

HYBRID RETAIL + F&B CONCEPTS – % interested (NET)				
	GenZ	Millennials	GenX	Boomers+
Chocolate & Confectionery	67%	58%	62%	63%
Alcohol, Wines & Spirits	63%	54%	57%	50%
Beauty & Cosmetics	59%	47%	52%	49%
Fashion & Accessories	59%	48%	59%	50%
Tobacco	50%	33%	40%	43%

IMPLICATION: Gen Z are the most receptive generation for new hybrid retail-F&B formats, particularly in Alcohol, Chocolate & Beauty – all categories where integrated tasting or sampling concepts can increase dwell time and trigger unplanned purchases.

F&B appetite is broadly consistent across generations, though Gen Z index higher for health-focus and Millennials show the strongest pull toward experiential dining.

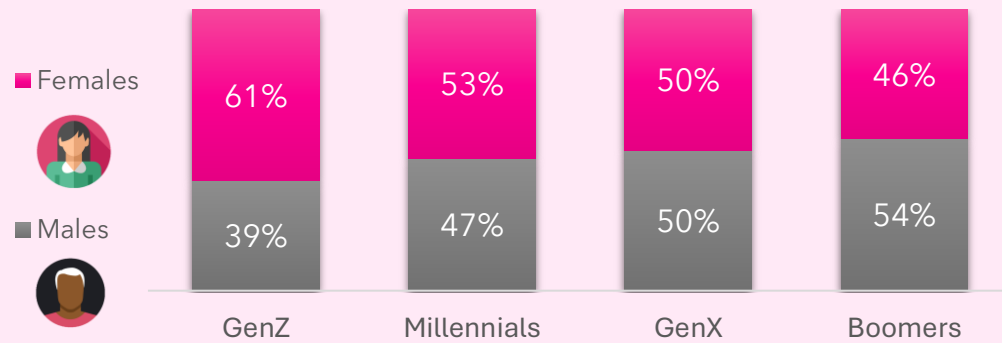


Different Generations in Travel Retail in the Nordics: How do they shop in Travel Retail?

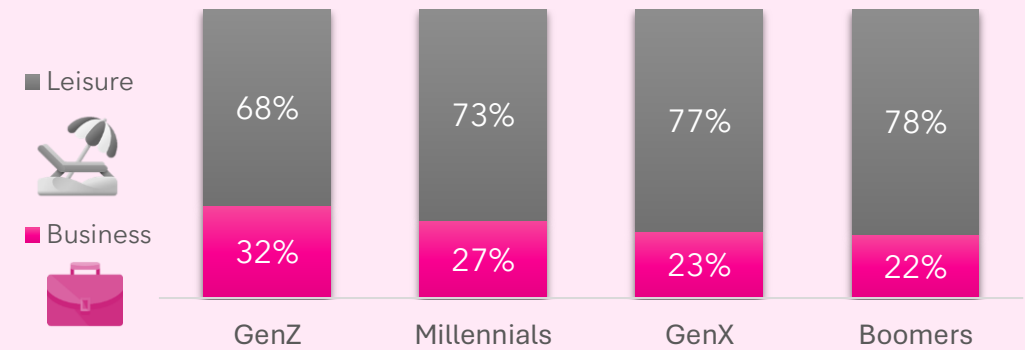
GEN Z MORE FEMALE AND BUSINESS-LED; OLDER TRAVELLERS MORE MALE AND LEISURE-DRIVEN.

Profile of Nordic travellers

GENDER



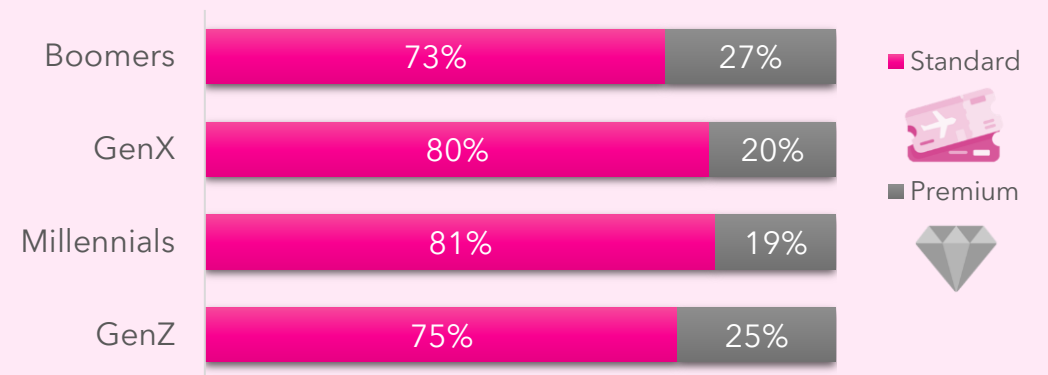
PURPOSE OF TRIP



AGE

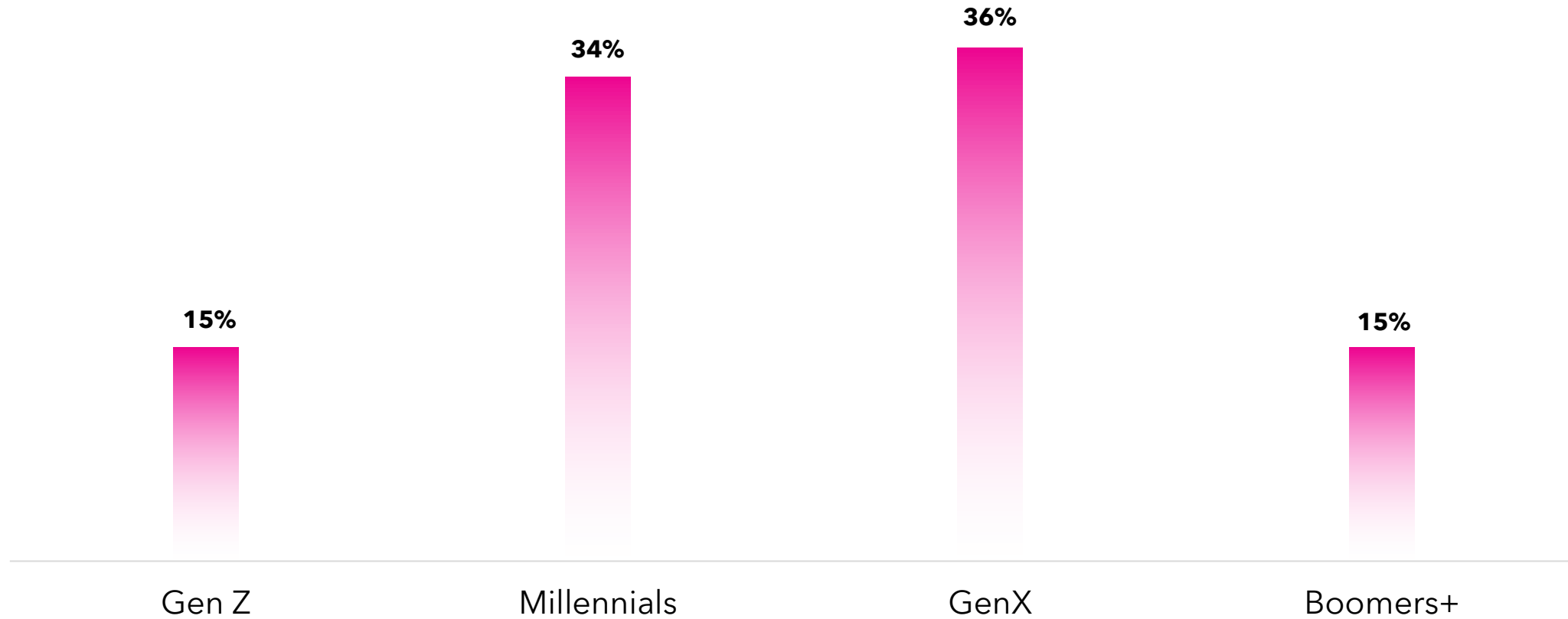


CLASS OF TRAVEL

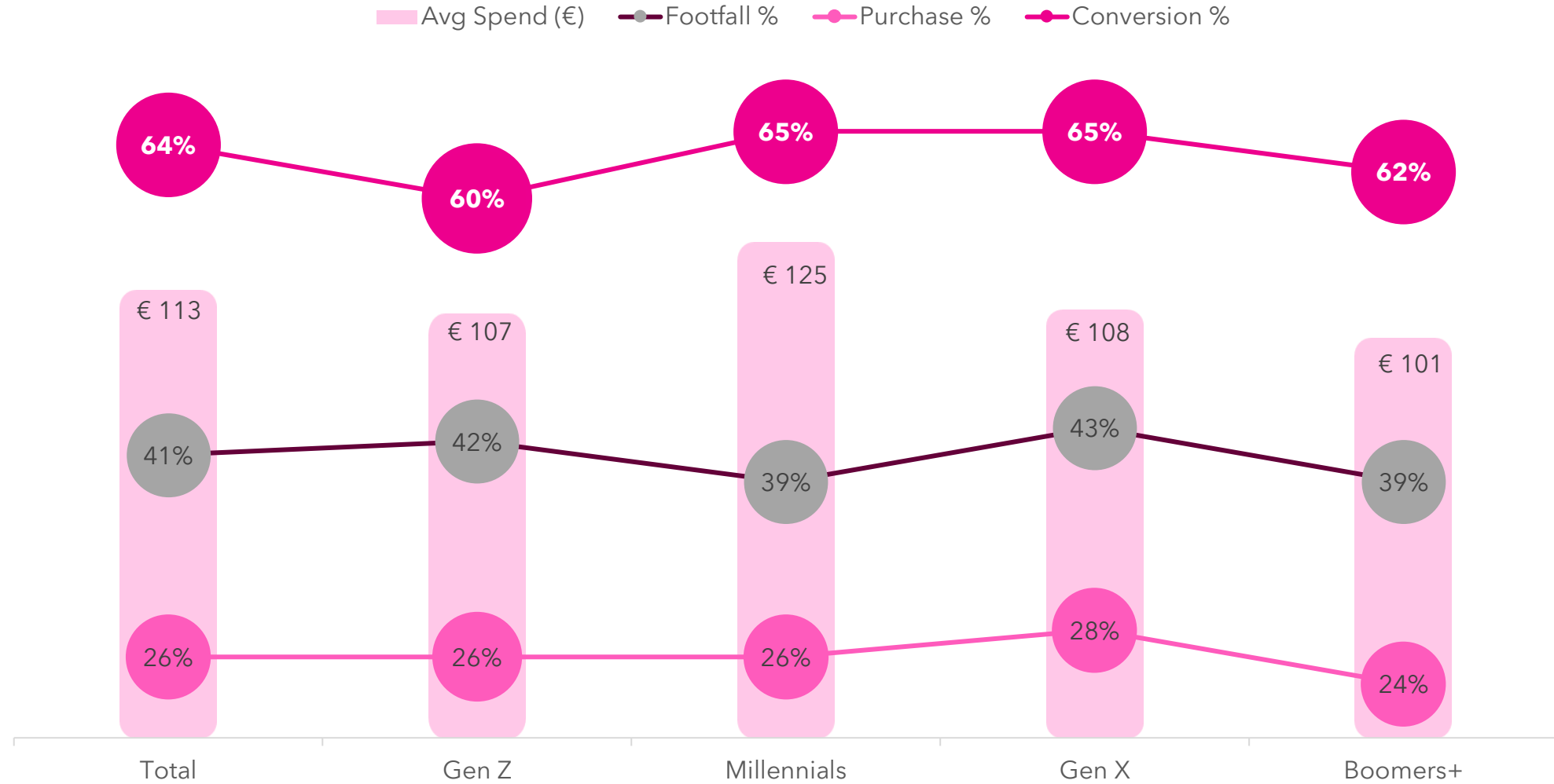


GEN X AND MILLENNIALS DOMINATE, WHILE GEN Z AND BOOMERS+ HOLD EQUAL SMALLER SHARES.

Share Among Travellers



MILLENNIALS LEAD SPEND AND CONVERSION DESPITE LOWER FOOTFALL.



GEN Z ARE THE MOST IMPULSE-LED, WHILE BOOMERS+ PLAN MOST BEFORE PURCHASE.

Planning purchase

GenZ

Most open to buying without the clear idea

Boomers

Most planned before the purchase

No clear idea in mind



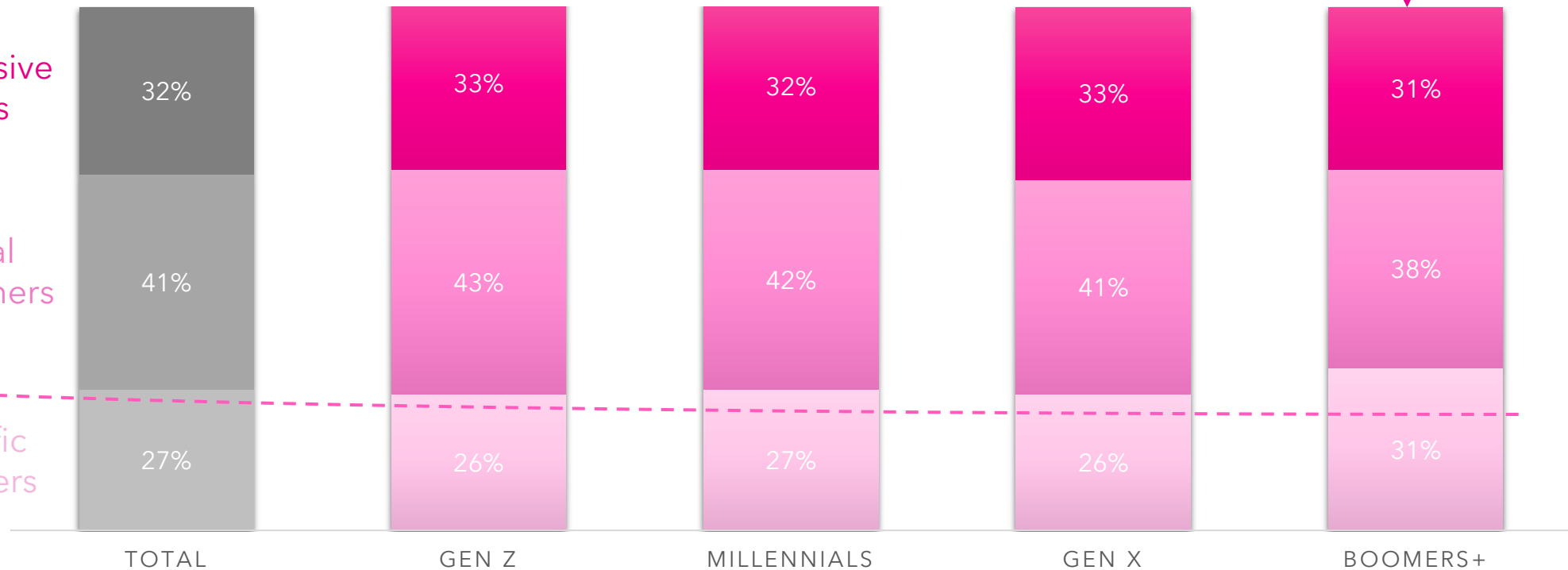
Impulsive Buyers



Partial Planners

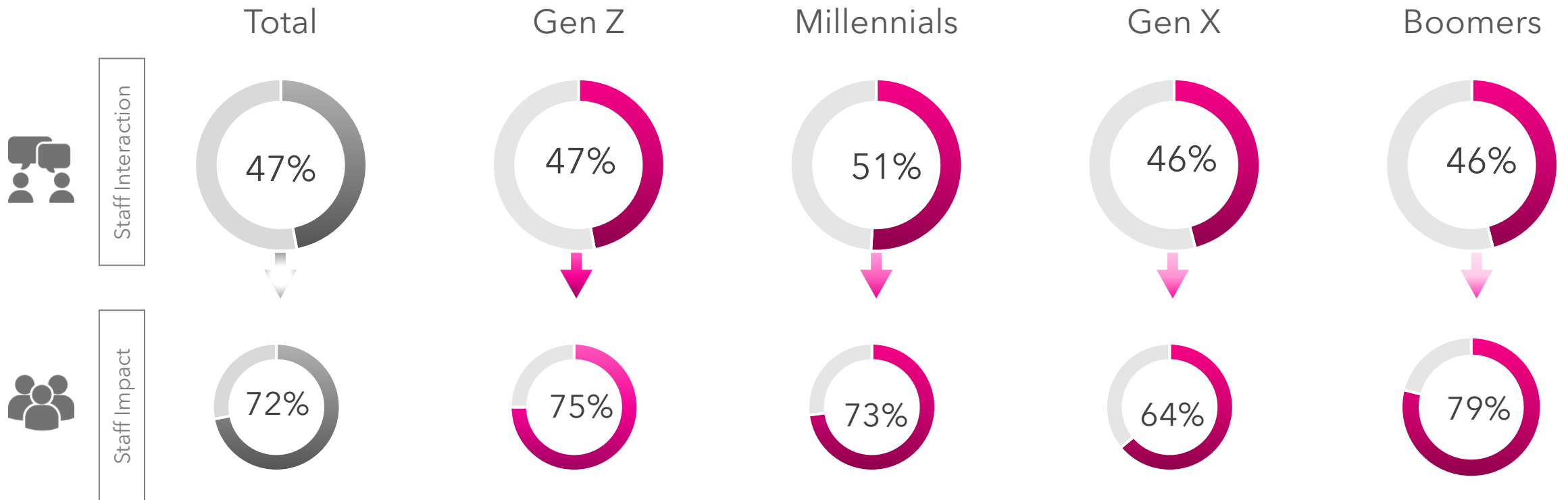


Specific Planners



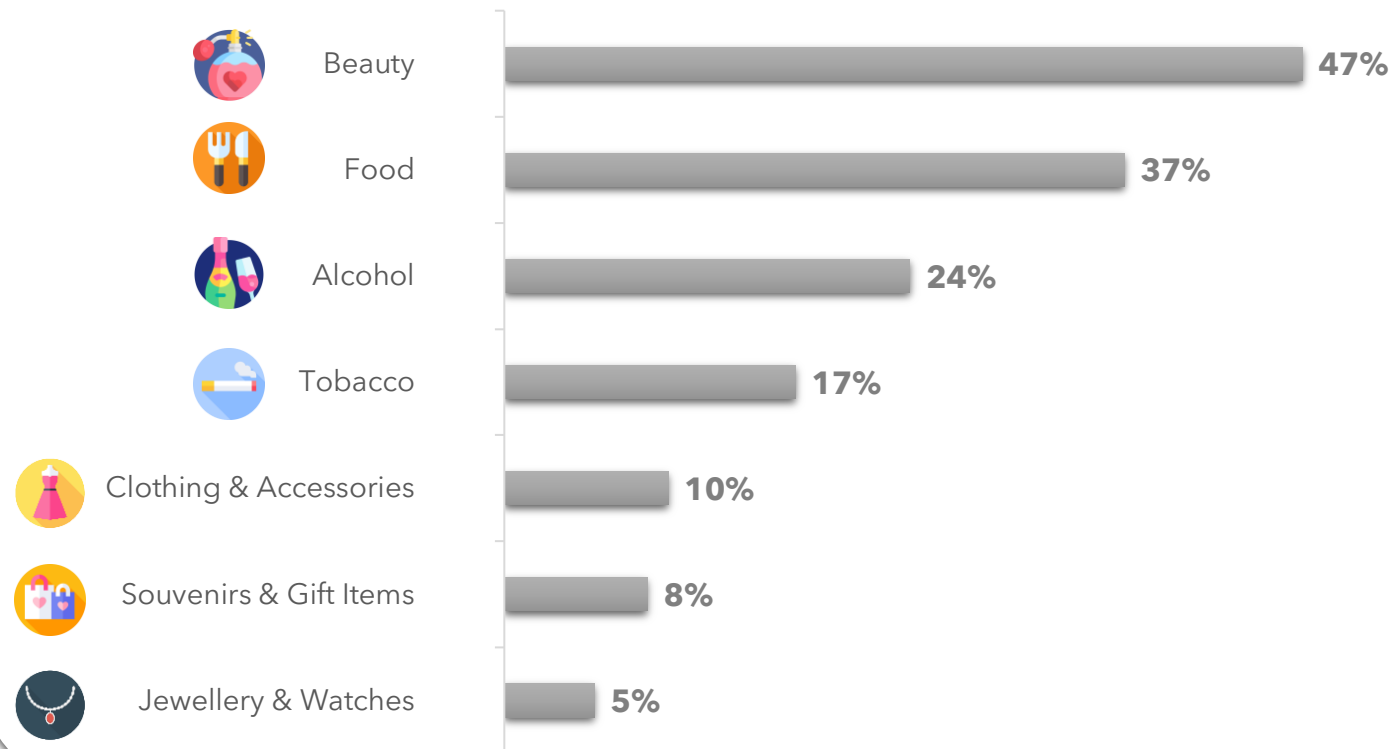
STAFF ENGAGEMENT IS HIGHEST AMONG MILLENNIALS, WHILE IMPACT PEAKS AMONG BOOMERS+.

Staff Interaction & Impact



BEAUTY AND FOOD LEAD PURCHASES, WITH YOUNGER TRAVELLERS SHOWING STRONGEST CROSS-CATEGORY POTENTIAL.

Category purchased



Gen Z



- Highest interest in food (45%) among age groups

Millennials



- Strong interest in beauty (53%) along GenZ

GenX



- Higher interest in Tobacco (18%) compared to younger travellers

Boomers

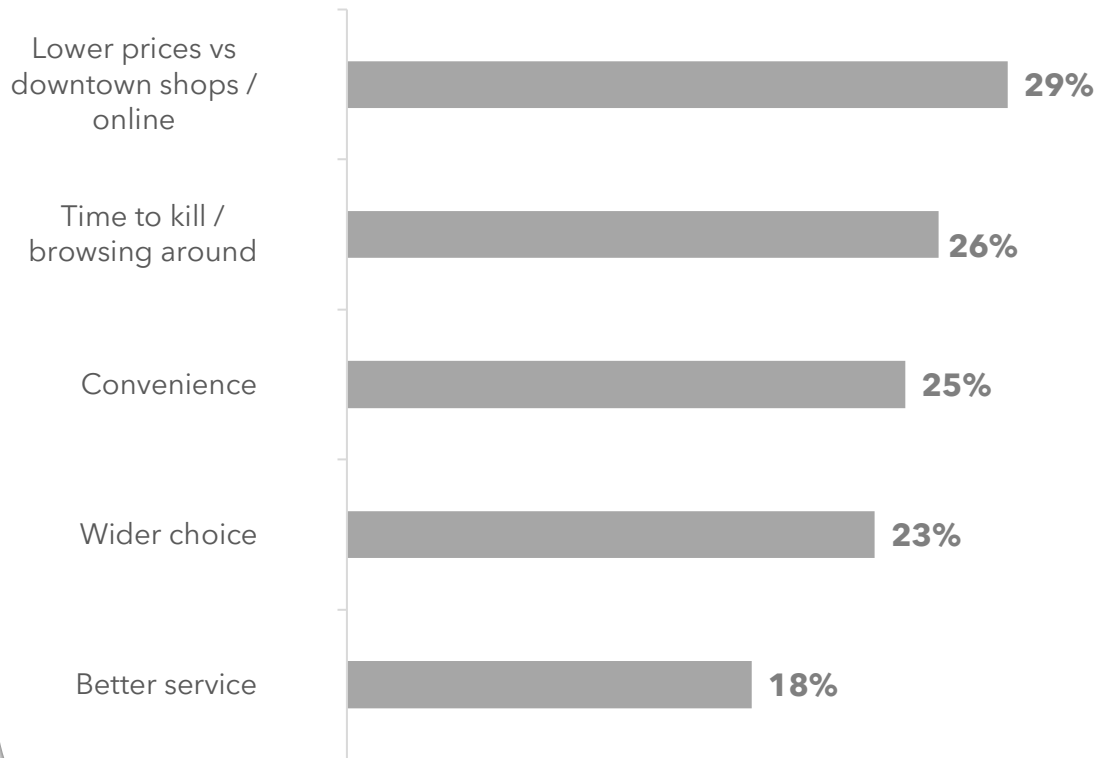


- The highest interest in Alcohol (29%) compared to other age groups

GENERATIONS SEEK DIFFERENT DF BENEFITS, FROM BROWSING EASE TO SERVICE AND PRICE.

What stands out by generations:

DF Appealing Factors



GenZ



①

Time to kill

30%

②

Convenience

26%

Millennials



①

Wider choice

26%

②

Better service

21%

GenX



①

Lower prices vs downtown shops

30%

②

Convenience

25%

Boomers



①

Lower prices vs downtown shops

36%

②

Time to kill

29%

AWARENESS PEAKS AMONG MILLENNIALS AND GEN X, WHILE BOOMERS+ SHOW THE clearest VISIBILITY GAP.

Those Who Noticed Touchpoints



GenZ

Lead in noticing airport touchpoints **outside Duty Free** (24%)



Millennials

Lead in noticing touchpoints **in-store at their destination** (34%)



GenX

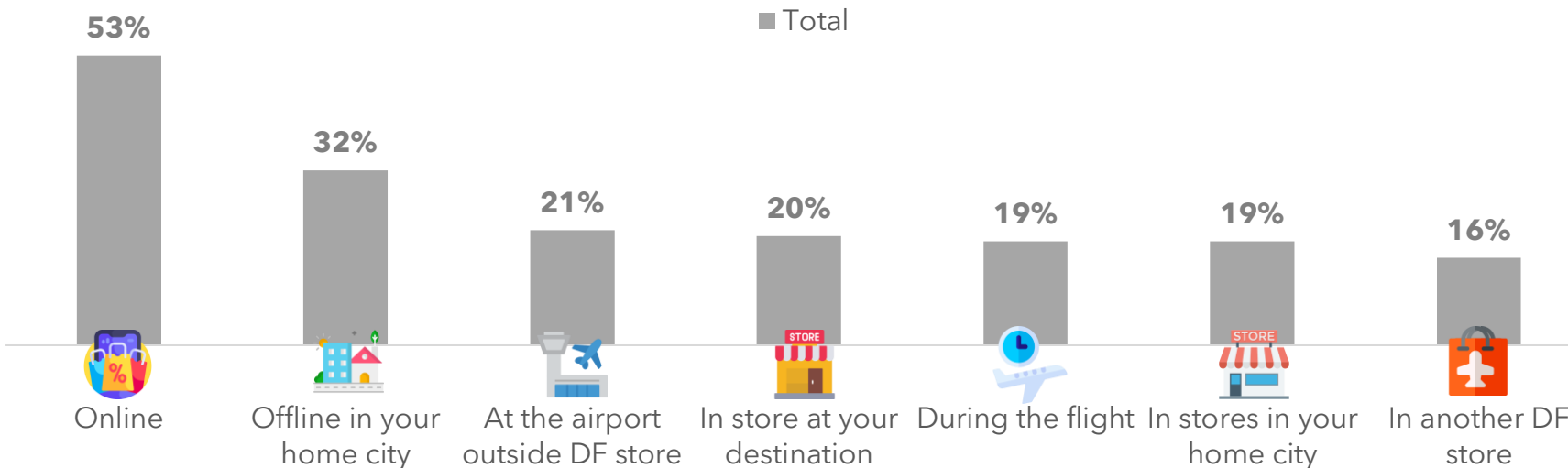
Gen X show no clear standout touchpoint, though **online** exposure remains high (53%)



Boomers

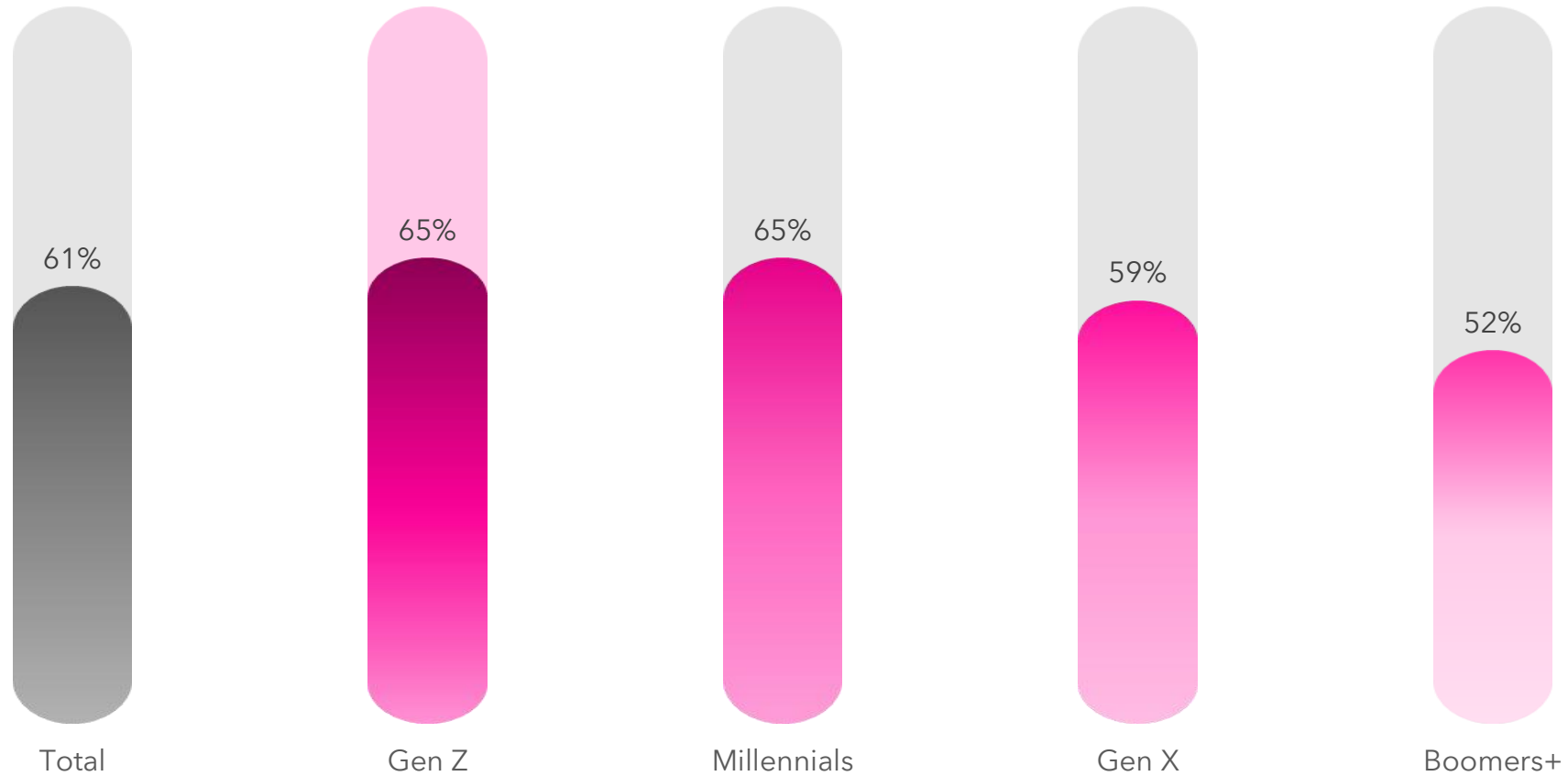
Gen X lead in both **online** (55%) and **home-city offline** (36%) touchpoints.

Key Touchpoints Exposure



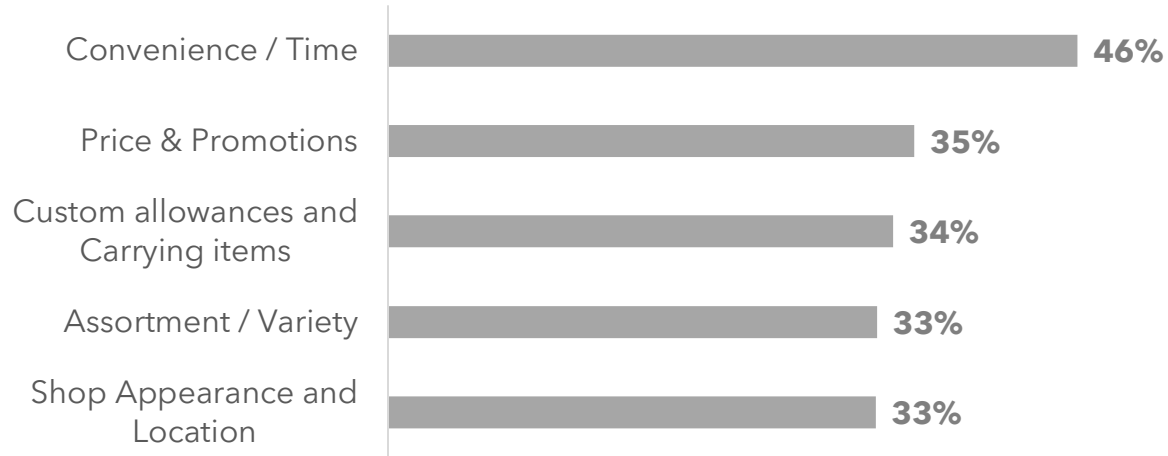
FIRST-TIME BUYING IS STRONGEST AMONG GEN Z AND MILLENNIALS, AND WEAKEST AMONG BOOMERS+.

First Time Buyers

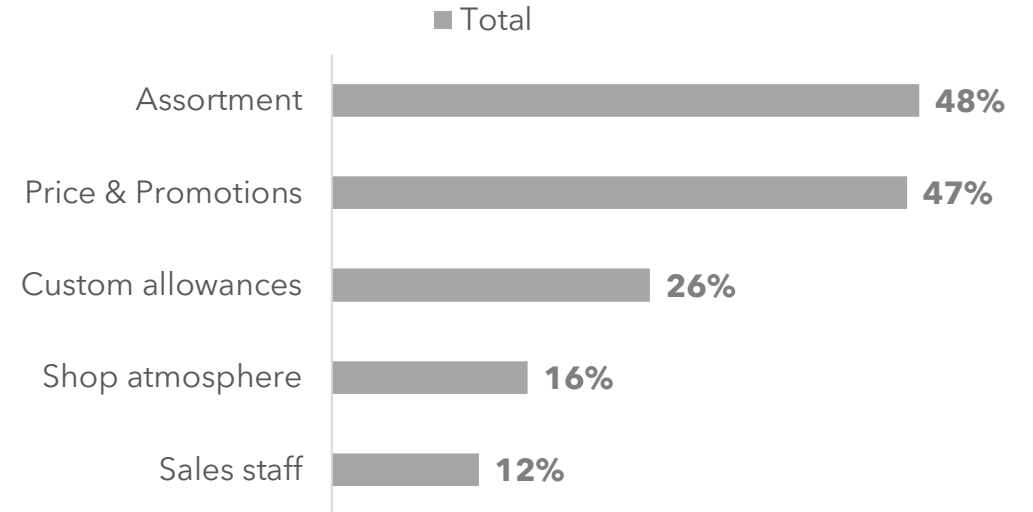


VALUE CLARITY AND ASSORTMENT REMAIN THE MAIN BARRIERS ACROSS GENERATIONS.

Barriers to Visit



Barriers to Purchase



GenZ

Visits:

Convenience/ time (46%)
Prices & Promotions (38%)

Purchases:

Prices & Promotions (50%)
Assortment (49%)



Millennials

Visits:

Convenience/ time (42%)
Prices & Promotions (31%)

Purchases:

Assortment (48%)
Price & Promotions (47%)



GenX

Visits:

Convenience/ time (44%)
Prices & Promotions (34%)

Purchases:

Assortment (46%)
Price & Promotions (45%)



Boomers

Visits:

Convenience/ time (59%)
Custom allowance and Carrying items (46%)




Purchases:

Assortment (48%)
Price & Promotions (45%)

PRICE COMPARISON IS STRONGEST AMONG MILLENNIALS AND WEAKEST AMONG BOOMERS+.



YOUNGER TRAVELLERS SHOW STRONGER DISCOVERY APPETITE THAN BOOMERS.

	Total	GenZ	Millennials	GenX	Boomers
PURCHASES OF PRODUCTS ON PROMOTION 	46%	47%	46%	47%	42%
PURCHASES OF PRODUCTS NEVER BOUGHT BEFORE 	61%	65%	65%	59%	52%
PURCHASES OF UNIQUE / DF EXCLUSIVE PRODUCTS 	57%	58%	61%	56%	46%



FOUR GENERATIONS - FOUR COMPLETELY DIFFERENT JOURNEYS

FOUR GENERATIONS - FOUR COMPLETELY DIFFERENT JOURNEYS



Gen Z

**STRONGEST
DISCOVERY
AUDIENCE**



Millennials

**ENGAGED
OPTIMISERS**



Gen X

**STRUCTURED
COMMERCIAL
SHOPPERS**



Boomerst+

**PLANNED
NAVIGATORS**

FOUR GENERATIONS - FOUR COMPLETELY DIFFERENT JOURNEYS



Gen Z

Airport mode: blended Retail & F&B explorer

Impulse buyer: most open to purchasing with no plan in mind

Category: food-first, with strong pull to beauty

What attracts: time to kill and easy browsing

Main barrier: friction and inconvenience stop them entering

Discovery: highest appetite for first-time and new products



Millennials

Airport mode: dual-visit optimiser across Retail & F&B

Highest spender: strongest converter despite lower footfall

Category: beauty-led, eco-conscious across all categories

What attracts: wider choice and better service

Main barrier: assortment gaps are the primary block to purchase

Discovery: most sustainability-driven generation



Gen X

Airport mode: structured zone-by-zone shopper

Commercial core: largest group, high conversion when offer fits

Category: strongest in alcohol purchase

What attracts: lower prices vs downtown is the top driver

Main barrier: price ambiguity and range gaps stop them buying

Discovery: Strong eco-consciousness, and second only to Gen Z on promotion-driven purchasing



Boomers+

Airport mode: planned navigator preferring clear zones

Planned buyer: least impulsive, most deliberate

Category: tobacco and alcohol dominate their preferences

What attracts: price saving remains the primary motivator

Main barrier: customs allowances and carrying capacity

Discovery: most influenced by staff – but rarely spoken to

KEY FINDINGS

➤ Duty Free engagement shifts from **discovery among younger travellers** to **efficiency among older travellers**, showing that each generation needs a different trigger to visit and purchase.

GEN Z are more exploratory, with stronger first-time buying and openness to staff influence, indicating that visible staff presence, product discovery and self-treat messaging can help convert them.

MILLENNIALS are highly engaged with touchpoints and price comparison, indicating that they are receptive to communication but need clear value proof before purchase.

GEN X show strong commercial responsiveness, with solid purchase and conversion performance, indicating high potential when offers, assortment and convenience are well aligned.

BOOMERS+ are less exposed to touchpoints and less likely to buy spontaneously, but respond strongly to staff, promotions and convenience, indicating that simple, visible offers and assisted selling are key.

➤ Overall, Duty Free should combine **inspiration and novelty for younger travellers** with **clarity, ease and reassurance for older travellers** to strengthen both store entry and conversion.



Nordic Travel
Retail Group

THANK YOU

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