



Nordic Travel
Retail Group

NTRG Q3 2026 REPORT

FINNISH 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 **Finnish travelers**, showing **differences in air traffic and shopping behaviour** between Finnish and other Nordic nationalities in Nordic Airports and Ferries.

Key Facts about Finnish Travelers

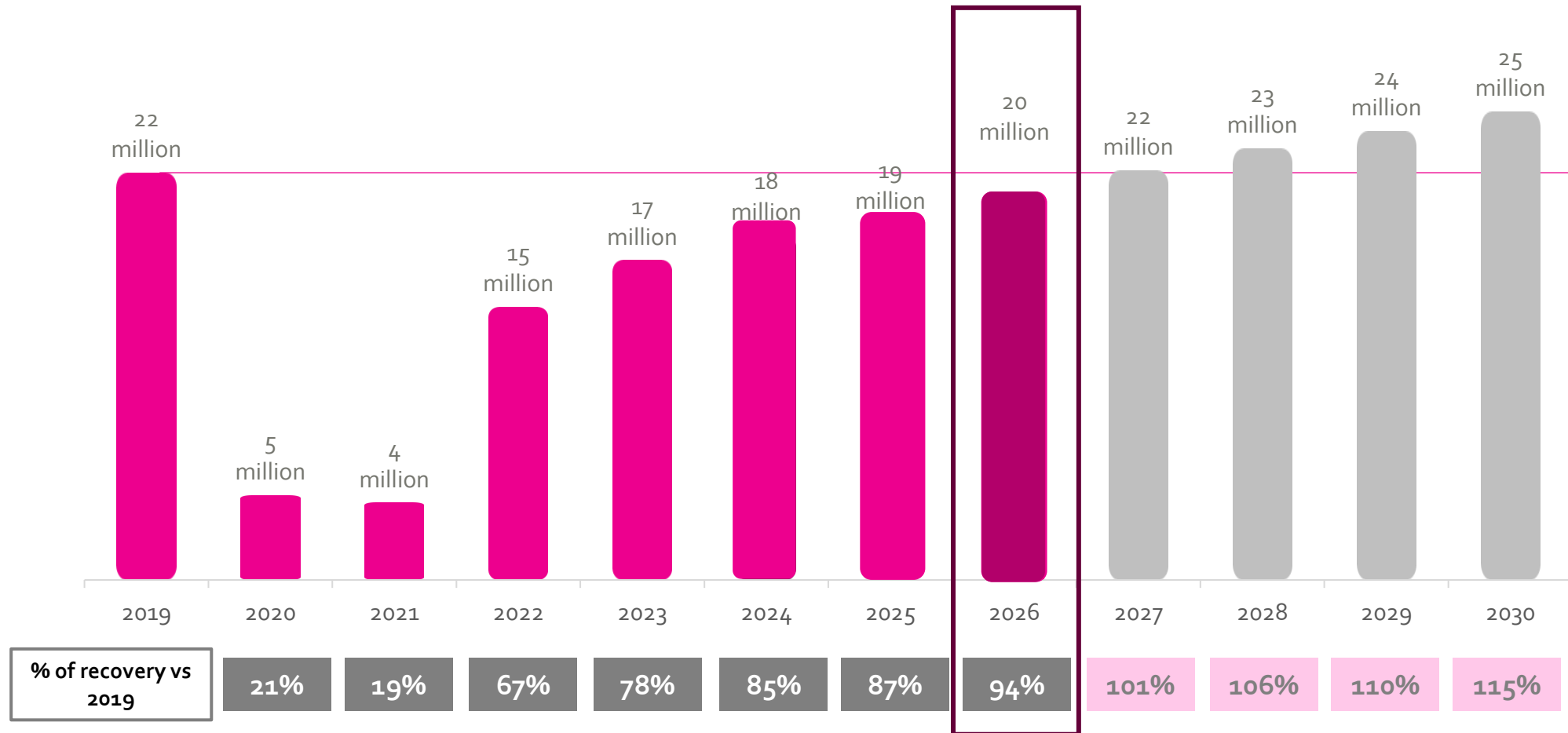
- The population is approximately **5.6 million**, with **strong purchasing power** despite being a relatively small Nordic market
- Finland is an EU member and **uses the Euro**, supporting **price transparency and easier comparison across travel retail markets**
- The country is **highly urbanised (≈85%)**, with the majority of the population concentrated in the **southern region around Helsinki**
- **Helsinki Airport is a key hub between Europe and Asia**, historically driving significant **long-haul transit traffic** (though still recovering)
- Finnish travellers are **frequent international travellers**, with a strong mix of **leisure and visiting friends & relatives (VFR) travel**
- Travel flows are split between **nearby destinations (Sweden, Spain, UK)** and **long-haul routes (notably Asia and the USA)**
- **Seasonality is pronounced**, with peaks in **winter (sun-seeking travel)** and **summer holidays**, driving fluctuations in duty free traffic

AIR TRAFFIC

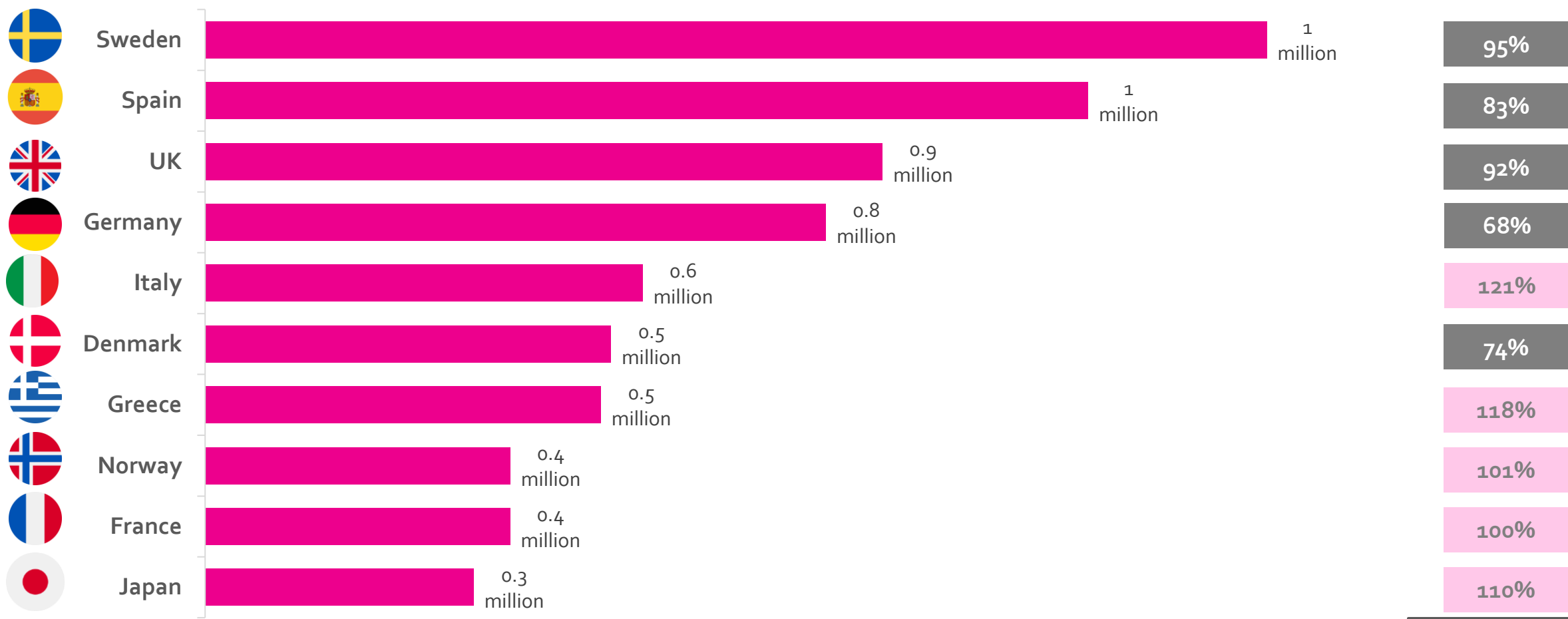
FINNISH TRAVELERS

FINLAND INTERNATIONAL FLIGHTS EVOLUTION

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

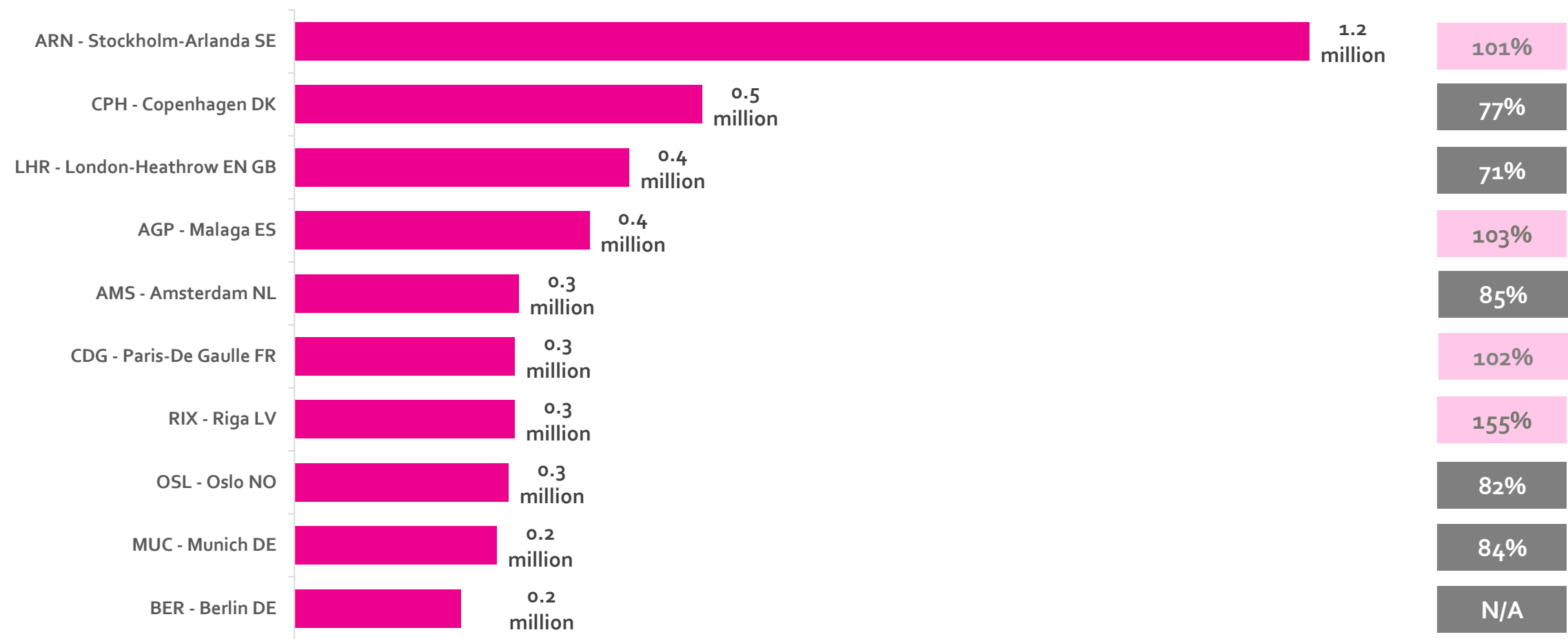


TOP 10 DESTINATIONS VISITED BY FINNISH TRAVELLERS IN 2025



% OF RECOVERY
VS 2019

TOP 10 AIRPORTS VISITED BY FINNISH TRAVELLERS IN 2025



AIRPORT SHOPPING BEHAVIOR

FINNISH TRAVELLERS

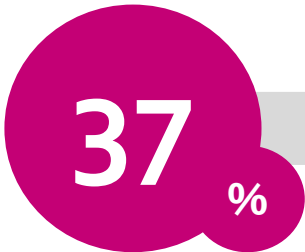
Footfall is slightly lower, but strong conversion more than compensates, resulting in solid purchase performance. Higher spend further reinforces a strong value capture, indicating an efficient in-store experience that maximises shopper potential once engaged.



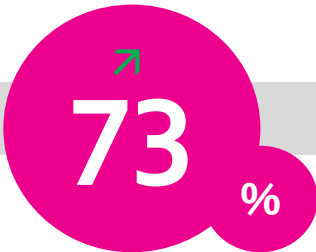
SHOPPING KPIS – IN NORDIC AIRPORTS

Finland

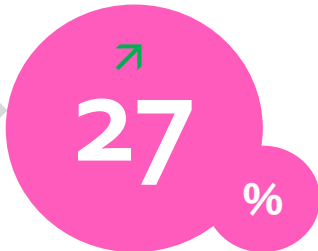
FOOTFALL
(% of DF visitors out of total PAX)



CONVERSION
(% of DF buyers out of DF visitors)



PURCHASE RATE
(% of DF buyers out of total PAX)

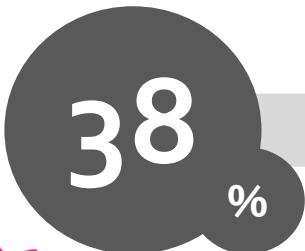


AV SPEND (€)

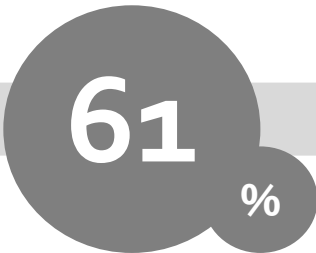


Other Nordic nationalities

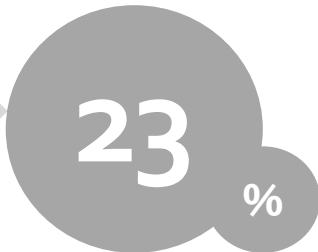
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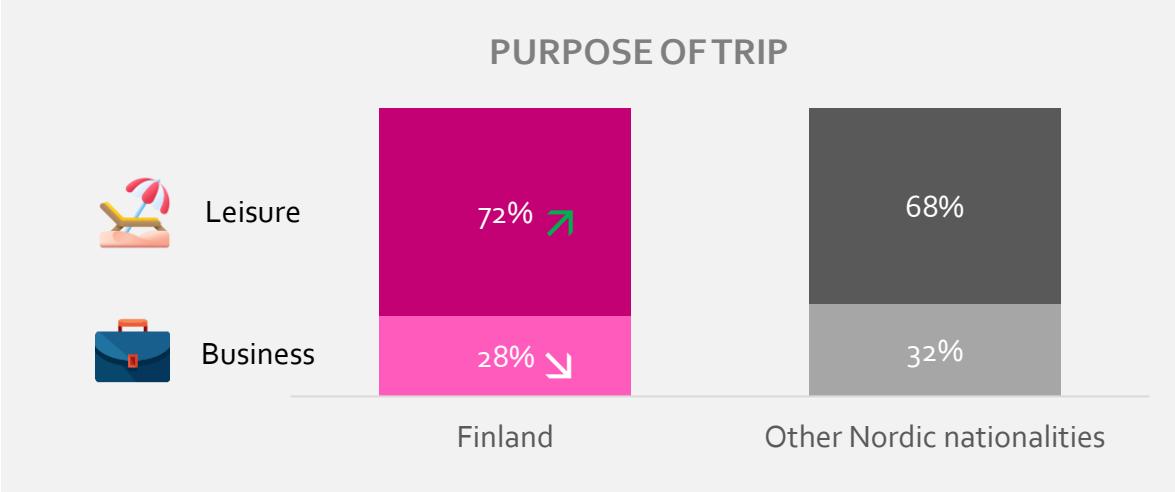
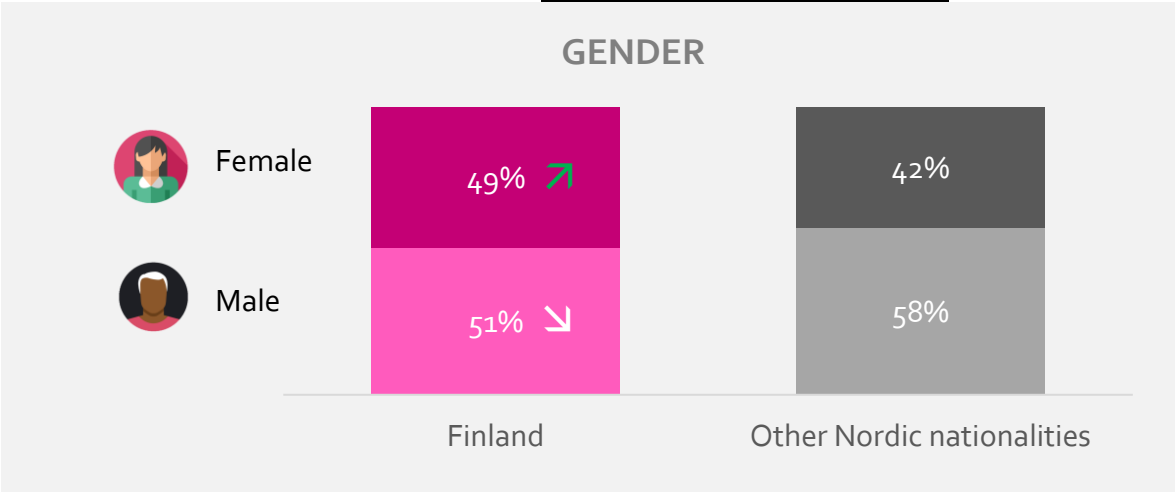
AV SPEND (€)



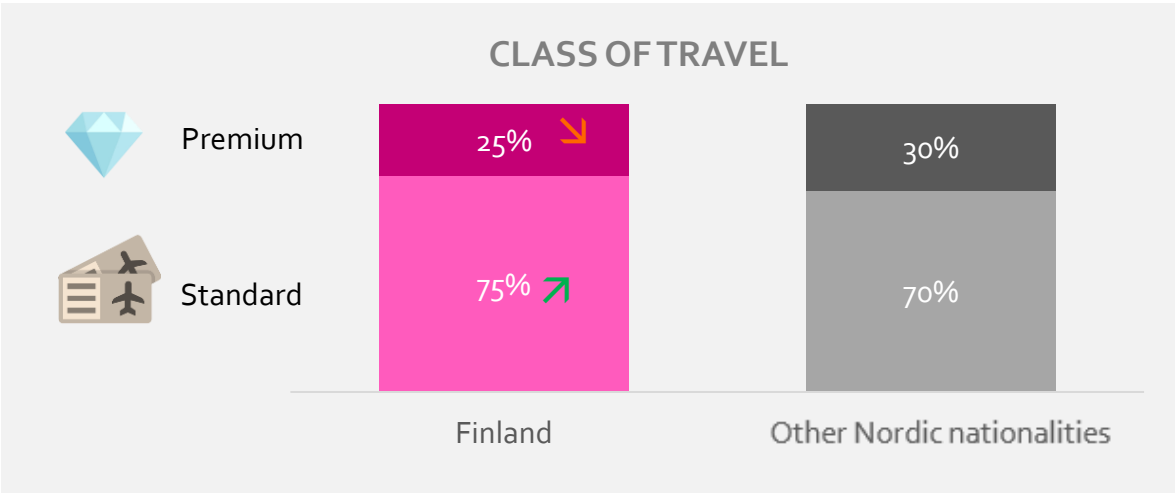
The visitor profile is more balanced in gender and skews older, with a stronger presence of Gen X and Boomers. Combined with a higher share of leisure travellers and standard class passengers, this reflects a more mature and mainstream audience with less emphasis on premium travel.



DF VISITORS PROFILE – IN NORDIC AIRPORTS



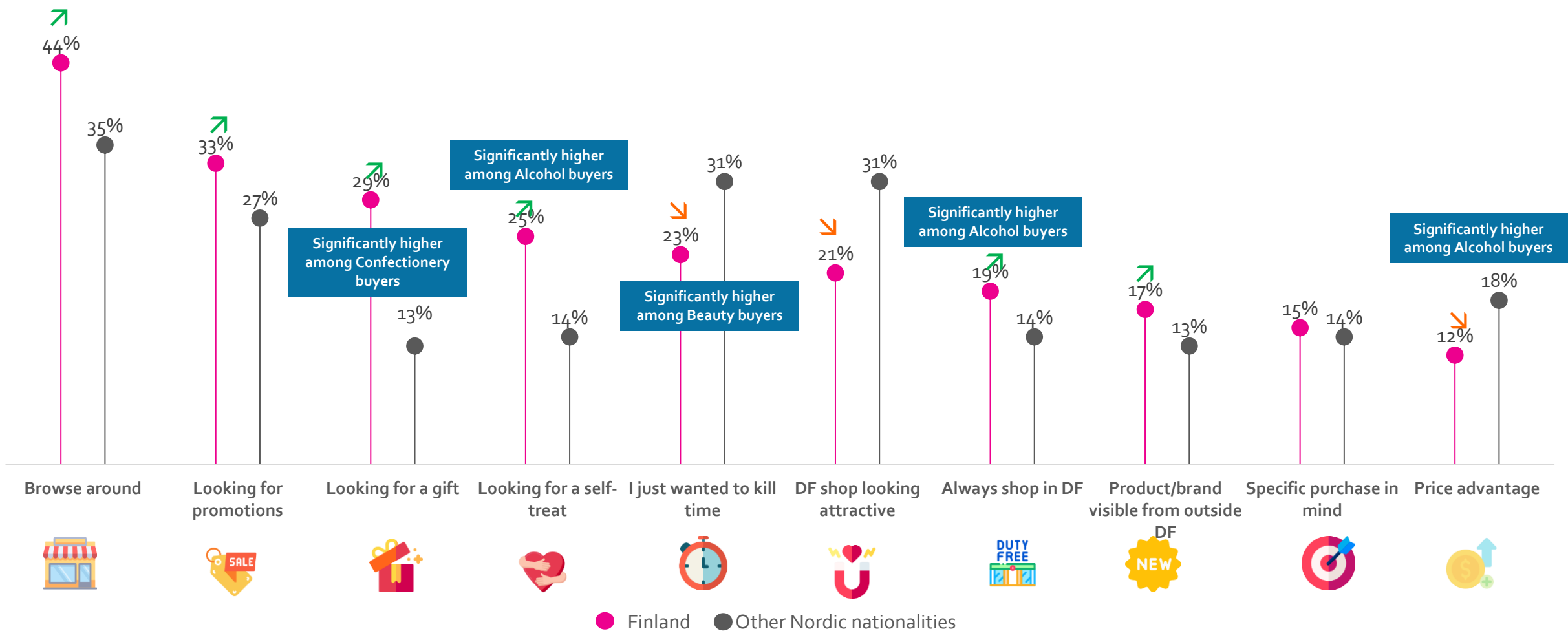
AGE		Finland	Other Nordic nationalities
Gen Z		15% ↓	25%
Millennials		27% ↓	38%
Gen X		32% ↑	24%
Boomers		27% ↑	12%
Avg age (y.o.)		45 ↑	40



Store visits are strongly driven by browsing, but also by promotional appeal and gifting, which play a more prominent role than for other Nordics. Compared to peers, there is a greater mix of experiential and value-driven triggers, while purely functional drivers such as price advantage are less influential.



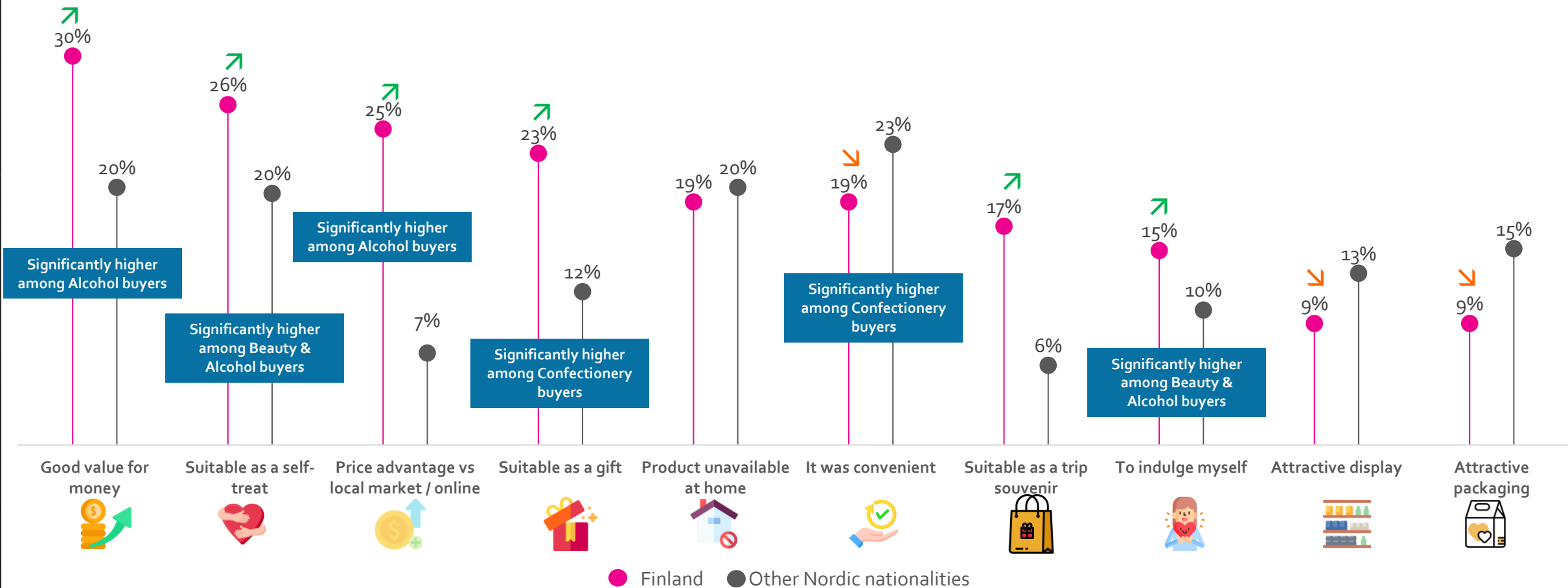
TOP 10 DRIVERS OF VISIT – IN NORDIC AIRPORTS



Purchases are strongly driven by value for money, clearly standing out as the primary trigger, followed by self-treating and price comparison. Gifting also plays an important role, while convenience and in-store stimuli are less influential, indicating a more deliberate and value-conscious decision process.



TOP 10 DRIVERS OF PURCHASE – IN NORDIC AIRPORTS



Price comparison is less prevalent, suggesting a lower tendency to benchmark across channels. When comparisons are made, they focus more on other duty free shops than online or downtown stores, indicating a more travel-retail-centric evaluation rather than a broad price-checking behaviour.



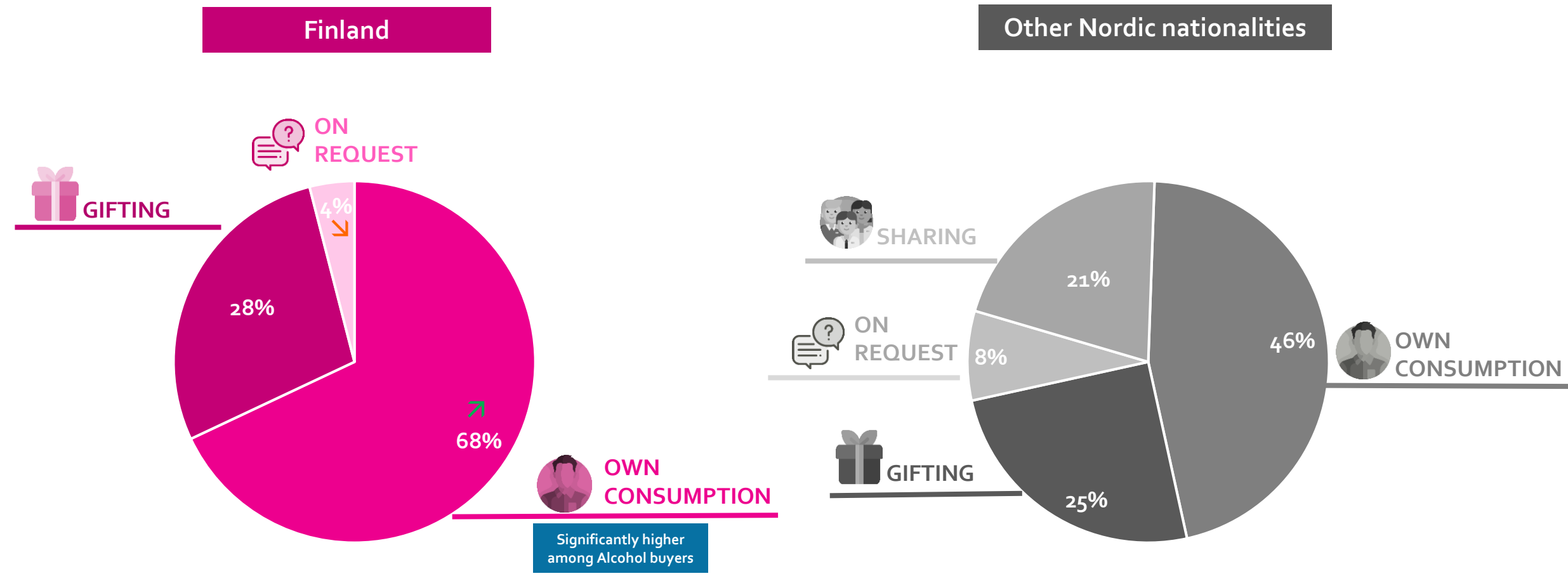
PRICE COMPARISON – BUYERS – IN NORDICS AIRPORTS



Purchases are strongly dominated by personal consumption, with a significantly higher share than other Nordics. Gifting also plays an important role, while request-based purchases remain very limited, highlighting a highly self-driven and intentional shopping behaviour.



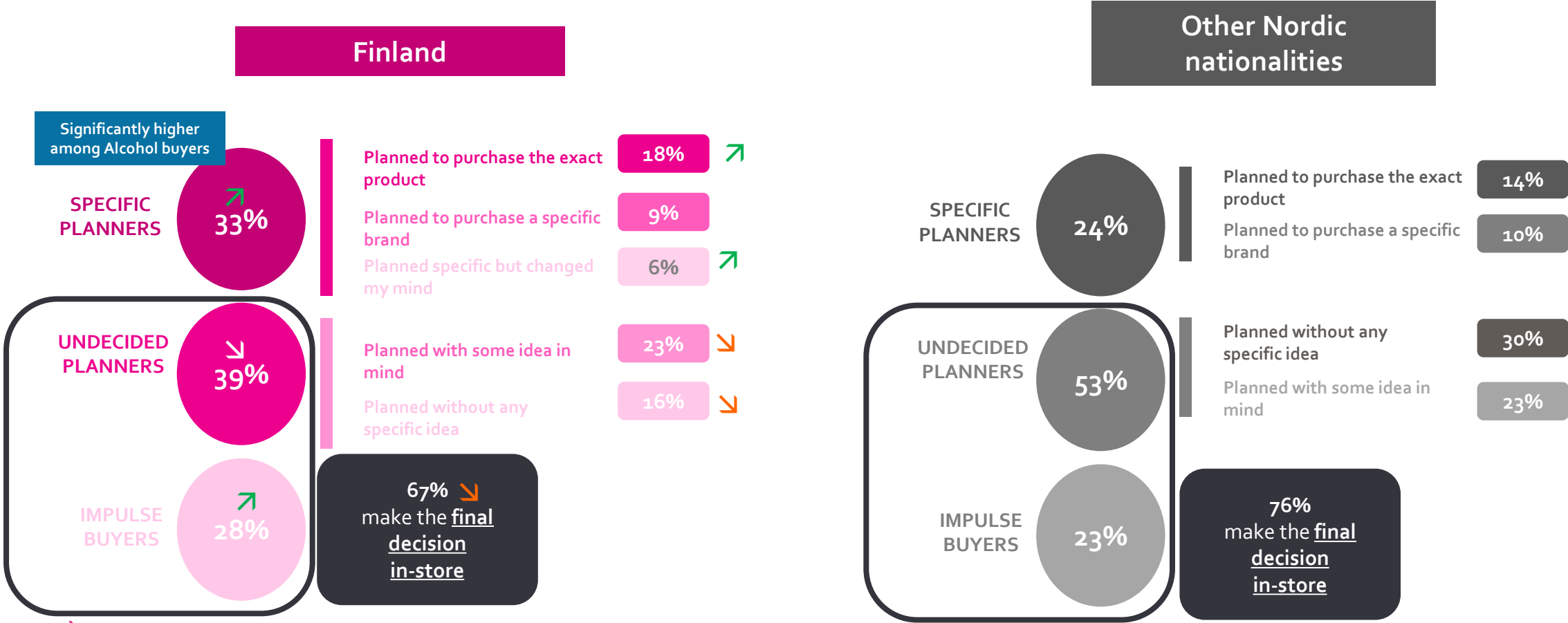
PURPOSE OF PURCHASE – IN NORDIC AIRPORTS



Planning behaviour is more defined, with a higher share of specific planners and clearer purchase intentions compared to other Nordics. While fewer shoppers remain undecided, a meaningful share still finalizes decisions in-store, allowing for continued influence at the point of purchase.



PLANNING LEVELS – IN NORDIC AIRPORTS



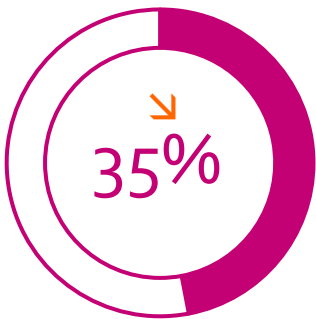
Interaction with sales staff is less frequent and also less impactful compared to other Nordics, indicating that human engagement plays a more limited role in influencing purchase decisions. This suggests an opportunity to strengthen both the reach and effectiveness of staff interaction in-store.



SALES STAFF INTERACTION & INFLUENCE – IN NORDIC AIRPORTS

Finland

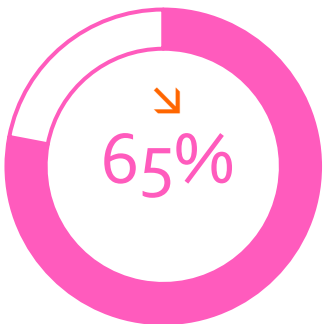
INTERACTED
WITH THE
STAFF



Significantly higher
among Beauty buyers

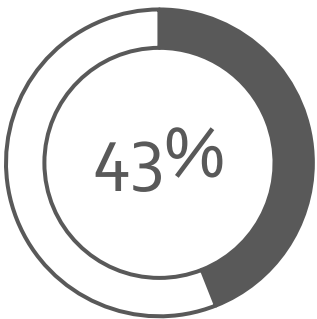
WERE IMPACTED
BY STAFF
INTERACTION

(out of those who interacted)



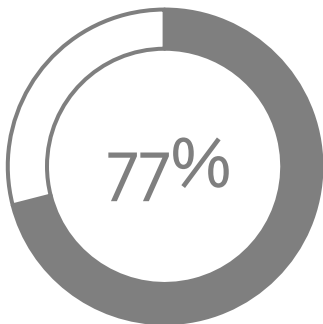
Other Nordic nationalities

INTERACTED
WITH THE
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WERE IMPACTED
BY STAFF
INTERACTION

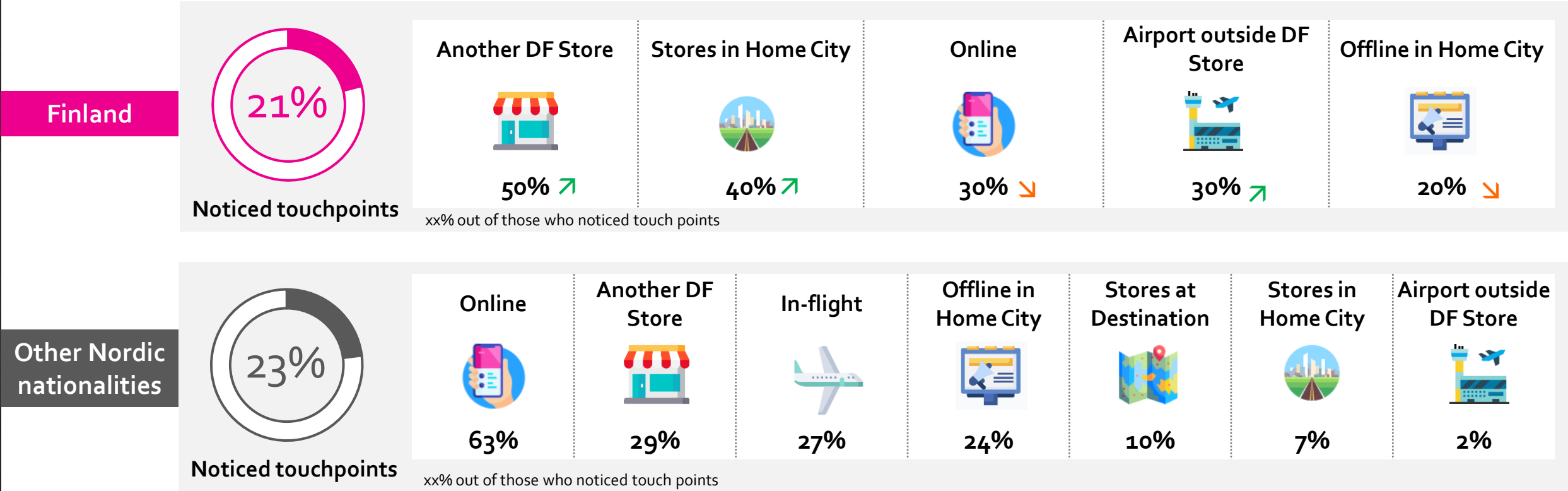
(out of those who interacted)



Touchpoint exposure is lower overall, with a stronger reliance on physical retail environments such as other duty free stores and home city locations rather than digital channels. Compared to other Nordics, the journey appears less digitally driven and more anchored in offline touchpoints.



TOUCHPOINTS & TOP MOMENTS OF EXPOSURE – IN NORDIC AIRPORTS



OVERVIEW OF KEY FINDINGS: FINNISH TRAVELERS AT AIRPORTS

1 CONVERSION-DRIVEN PERFORMANCE DESPITE LOWER TRAFFIC

Lower store entry is offset by strong conversion, allowing shoppers who do enter to be effectively captured and translated into purchases.

2 STRONG VALUE CAPTURE AND SPEND POTENTIAL

Higher average spend highlights an ability to maximise value per shopper, supported by a mix of value perception and considered purchasing behaviour.

3 MATURE, MAINSTREAM TRAVELLER PROFILE

An older, more balanced and less premium-oriented audience reflects a stable, mainstream shopper base with more established habits and expectations.

4 VALUE AND GIFTING AT THE CORE OF DECISIONS

Purchases are strongly driven by value for money, complemented by self-treating and gifting, indicating a mix of rational and emotional motivations.

5 MORE PLANNED AND SELF-DIRECTED BEHAVIOUR

Shoppers are more likely to enter with clear purchase intentions and rely less on in-store stimuli, reflecting a more deliberate and independent decision process.

6 LOWER INFLUENCE OF TOUCHPOINTS AND STAFF

Reduced exposure to touchpoints and lower impact of sales staff suggest that external influence plays a more limited role, with shoppers relying more on pre-formed intent.

SHOPPING BEHAVIOR ON FERRIES



FINNISH TRAVELLERS

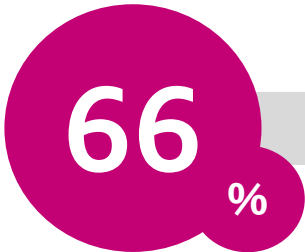
Performance is strong across all KPIs, with high footfall and conversion translating into a solid purchase rate. In addition, higher spend indicates a well-balanced funnel where both engagement and value per shopper are effectively maximised.



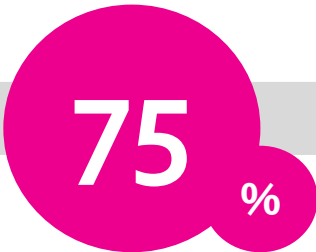
SHOPPING KPIS – IN NORDIC FERRIES

Finland

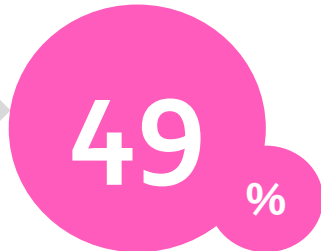
FOOTFALL
(% of DF visitors out of total PAX)



CONVERSION
(% of DF buyers out of DF visitors)



PURCHASE RATE
(% of DF buyers out of total PAX)

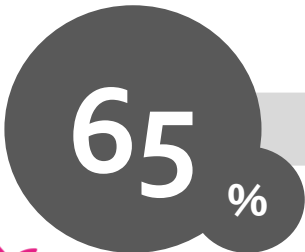


AV SPEND (€)

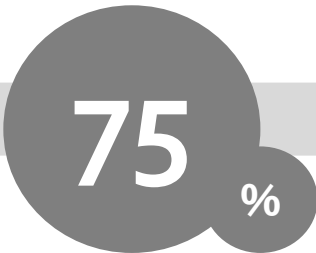


Other Nordic nationalities

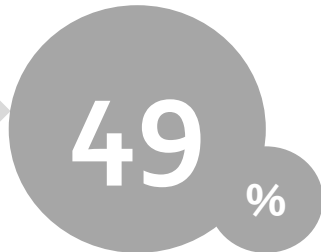
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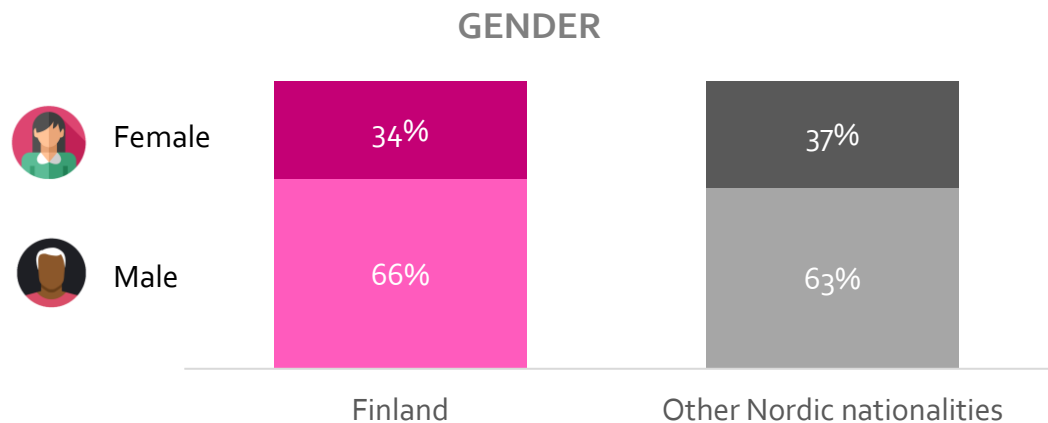
AV SPEND (€)



The visitor base is more male-dominated and slightly older in structure, with a stronger presence of Gen X and fewer younger shoppers. This points to a more mature and stable audience profile, with potentially different expectations and shopping behaviours compared to other Nordic travellers.



VISITOR PROFILE – IN NORDIC FERRIES



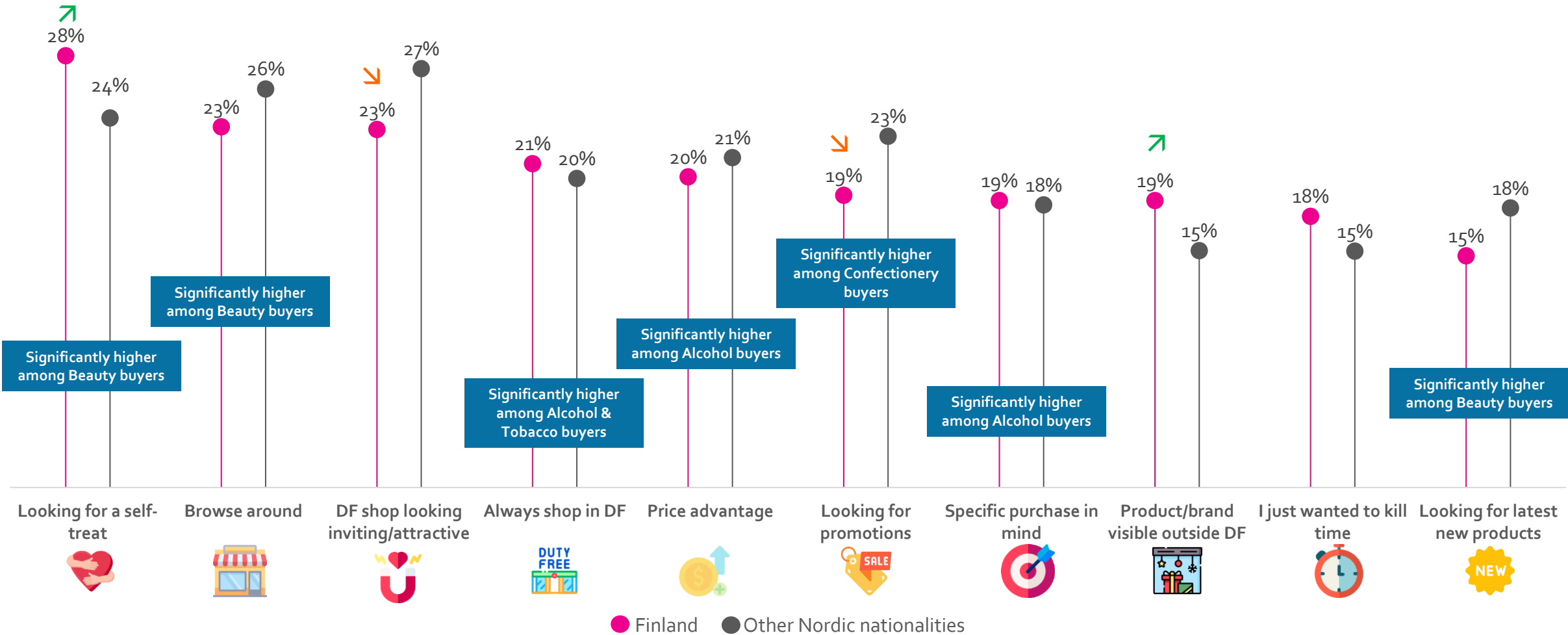
AGE		
	Finland	Other Nordic nationalities
Gen Z	5%	7%
Millennials	46% ↘	52%
Gen X	45% ↗	34%
Boomers	4%	7%
Avg age (y.o.)	42	42



Store visits are driven by a mix of emotional and functional triggers, with self-treating standing out alongside strong store appeal and price advantage. Compared to other Nordics, there is a slightly stronger role for product visibility and impulse-driven moments, while browsing and promotion-led drivers are less dominant.

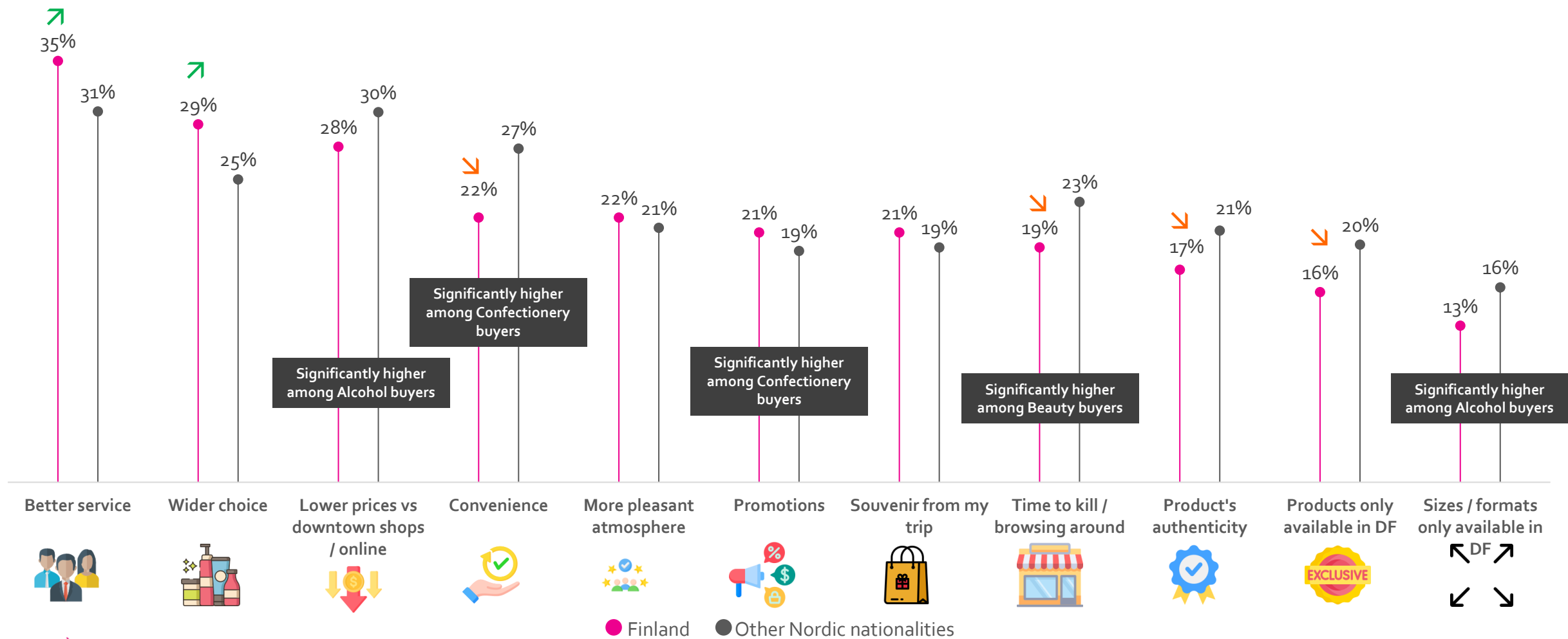


TOP 10 DRIVERS OF VISITS – IN NORDIC FERRIES



Duty free appeal is strongly driven by service and assortment, with shoppers placing more importance on quality of experience and product range than on price alone. Compared to other Nordics, there is less emphasis on convenience and promotions, highlighting a more experience-oriented and quality-focused perception of duty free onboard.

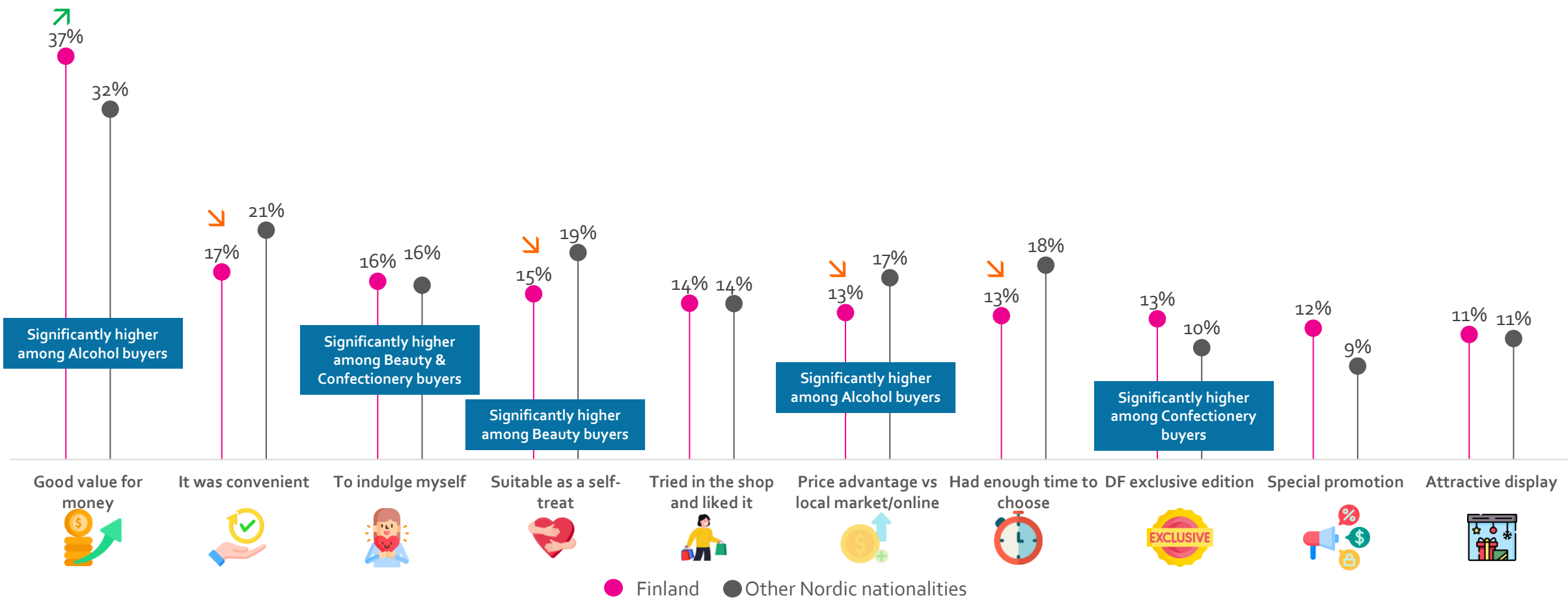
DUTY FREE APPEAL FACTORS - IN NORDIC FERRIES



Purchases are strongly driven by value for money, clearly standing out as the primary trigger. At the same time, convenience and experiential elements such as self-indulgence and trial play a secondary role, while time-related and store-driven factors are less influential, pointing to a more value-led but still partially experiential decision process.



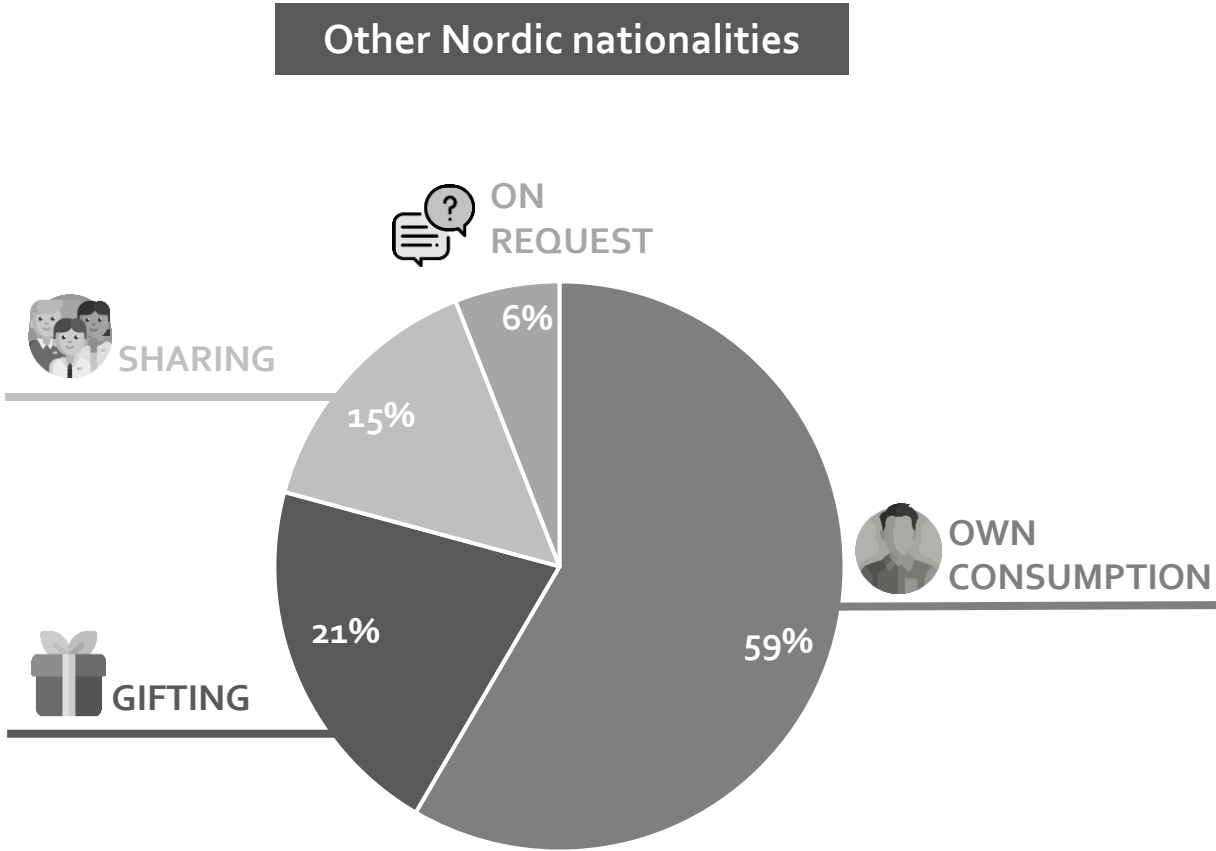
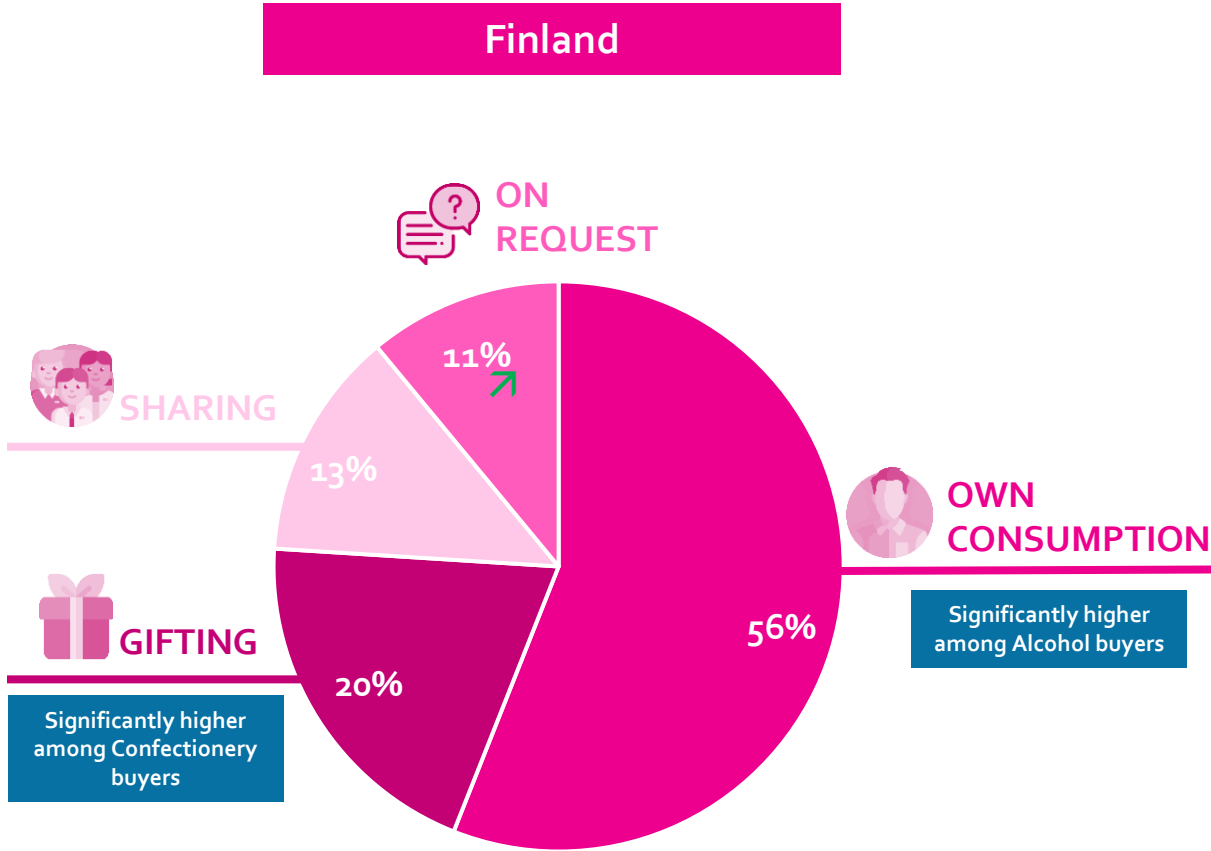
TOP 10 DRIVERS OF PURCHASE – IN NORDIC FERRIES



Purchases are primarily driven by personal consumption, but with a notably stronger role for request-based buying compared to other Nordics. Gifting and sharing play a more secondary role, suggesting a more need-driven and externally influenced purchase behaviour.



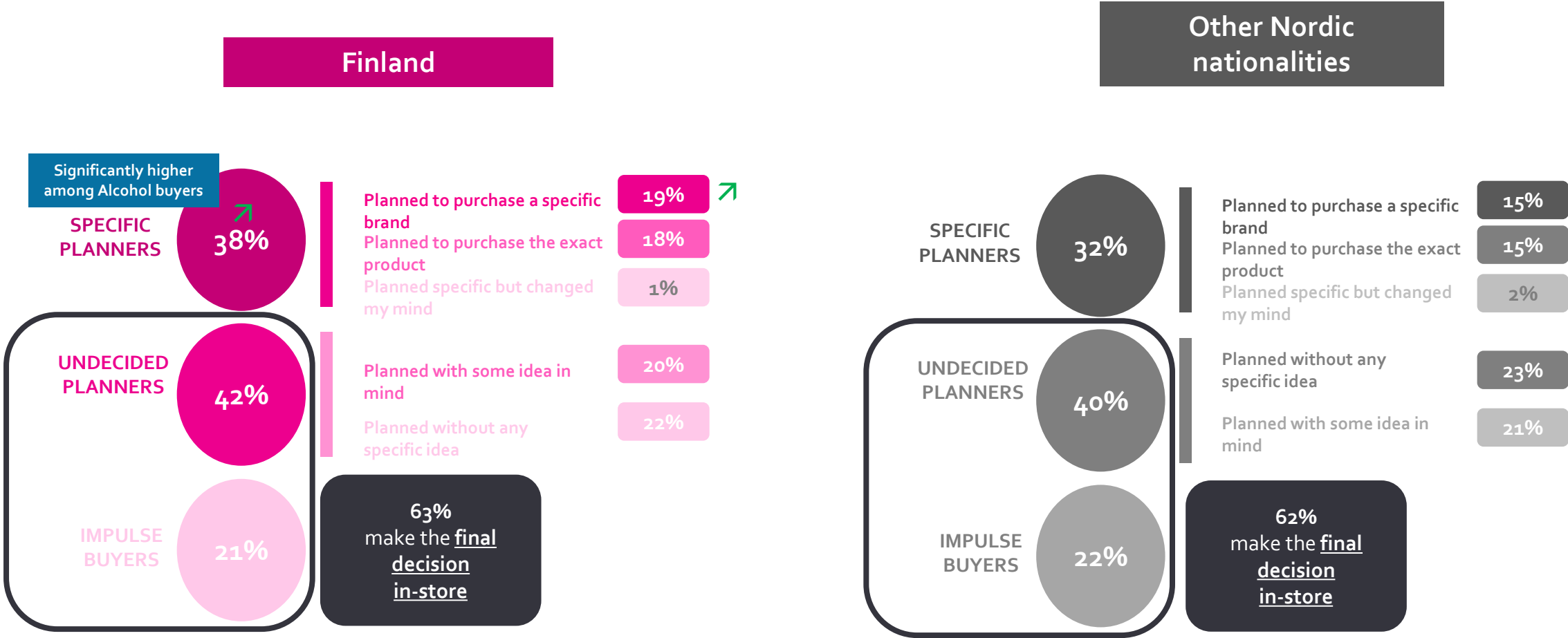
PURPOSE OF PURCHASE – IN NORDICS FERRIES



Planning behaviour is relatively structured, with a higher share of specific planners and clearer purchase intentions compared to other Nordics. However, a large portion still enters with only a general idea, leaving room for in-store influence to shape final decisions.



PLANNING LEVELS – IN NORDIC FERRIES

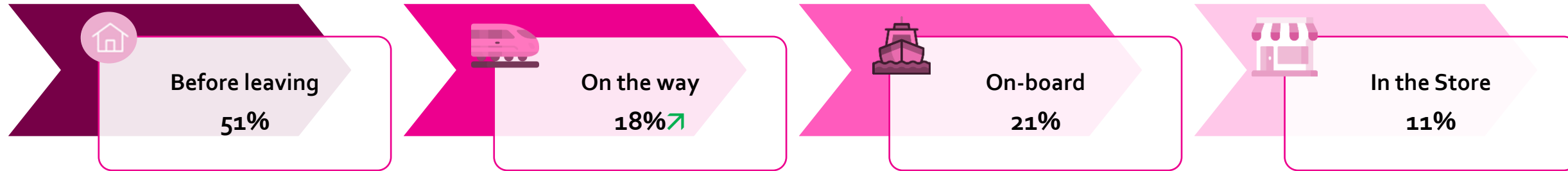


Purchase consideration starts early, with many shoppers already planning before the journey, but there is also a relatively stronger role for en-route thinking compared to in-store decisions. This indicates that influencing shoppers ahead of arrival remains key, while onboard activation plays a more supportive role.



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

Finland



Other Nordic nationalities



Interaction levels are relatively high, and when engagement occurs, it has a strong impact on purchase decisions. This highlights the effectiveness of staff in influencing shoppers and reinforces their role as a key driver of conversion onboard.



SALES STAFF INTERACTION & INFLUENCE – IN NORDIC FERRIES

Finland

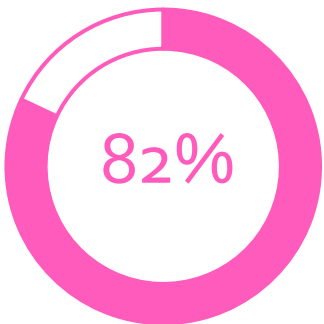
INTERACTED
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Significantly higher
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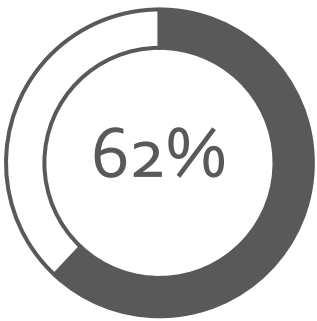
WERE IMPACTED
BY STAFF
INTERACTION

(out of those who interacted)



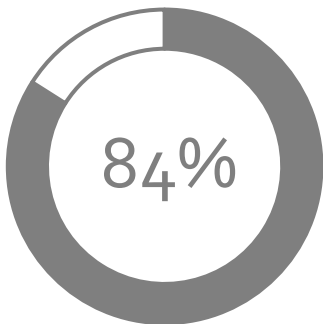
Other Nordic nationalities

INTERACTED
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WERE IMPACTED
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INTERACTION

(out of those who interacted)



Promotions play a slightly less prominent role in driving purchases, while first-time buying remains strong, indicating openness to discovery. At the same time, interest in duty free exclusives is relatively high, suggesting that uniqueness and differentiated offers are important drivers of appeal.



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



PURCHASES OF
PRODUCTS ON
PROMOTION

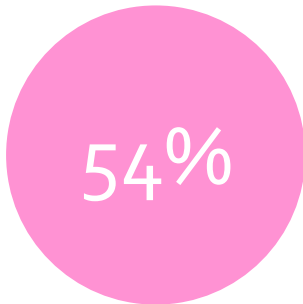
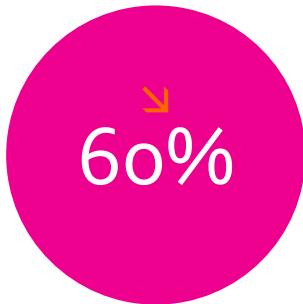


PURCHASES OF
PRODUCTS NEVER
BOUGHT BEFORE
(FIRST TIME BUYERS)

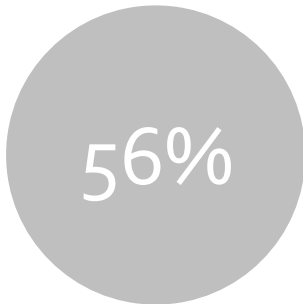
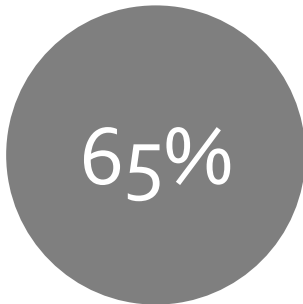


PURCHASES OF UNIQUE /
DF EXCLUSIVE PRODUCTS

Finland



Other Nordic
nationalities

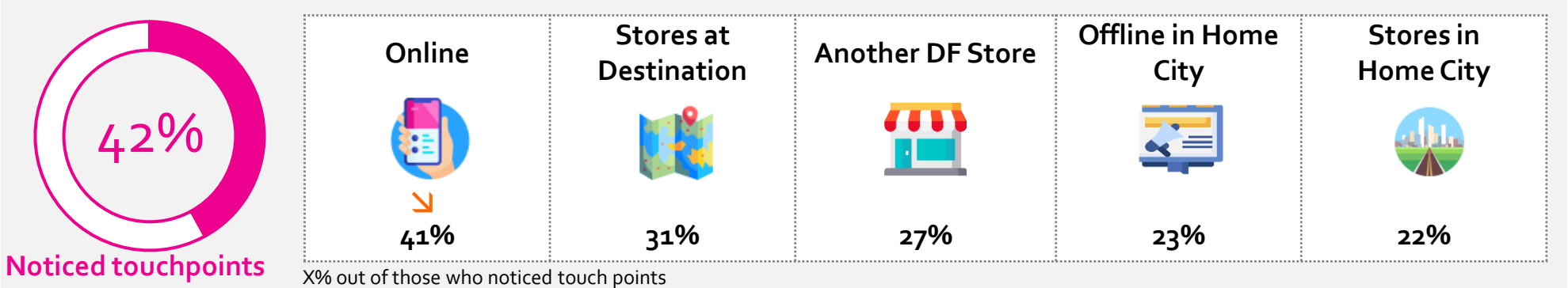


Touchpoint exposure is in line with other Nordics, but less dominated by online channels, with a more balanced mix across physical environments such as destination stores and other duty free locations. This suggests a more diversified journey where multiple touchpoints contribute to awareness and consideration.

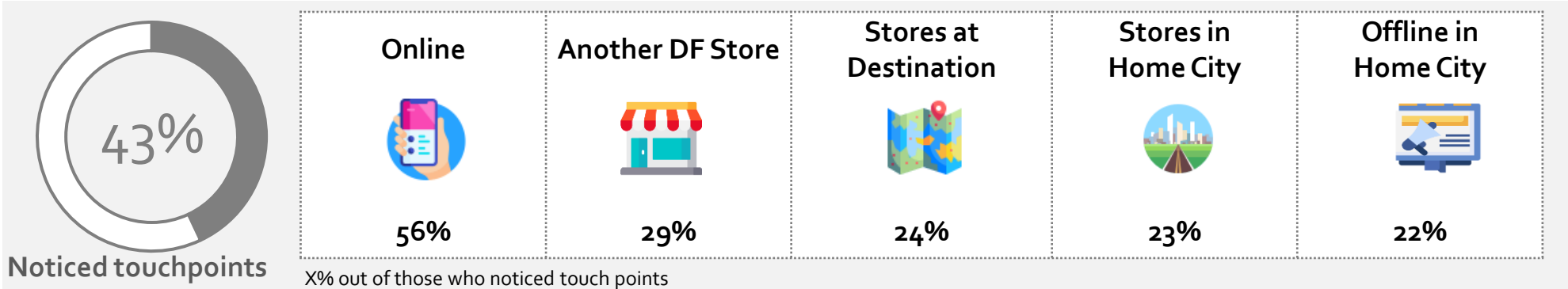


TOUCHPOINTS & TOP MOMENTS OF EXPOSURE – IN NORDIC FERRIES

Finland



Other Nordic nationalities



OVERVIEW OF KEY FINDINGS: FINNISH TRAVELERS ON FERRIES

1

HIGH-PERFORMING AND BALANCED FUNNEL

Strong footfall and conversion translate into a solid purchase rate, supported by higher spend, indicating an efficient and well-performing end-to-end shopping journey.

2

VALUE-LED BUT NOT PRICE-ONLY MINDSET

Value for money is the primary purchase driver, but shoppers also respond to service quality, assortment and overall experience, creating a more balanced value perception.

3

MATURE AND STABLE SHOPPER PROFILE

A more male-dominated and Gen X-skewed audience reflects a mature shopper base, likely to have clearer preferences and more established shopping habits.

4

STRUCTURED PLANNING WITH ROOM TO INFLUENCE

Shoppers are more likely to plan purchases in advance, yet many still enter with only a general idea, leaving space for in-store activation to shape final decisions.

5

STRONG IMPACT OF HUMAN INTERACTION

Sales staff play a key role in influencing purchases (especially in the Beauty category), with high interaction levels translating into strong impact, making human engagement a critical conversion lever.

6

OMNICHANNEL AND DIVERSIFIED SHOPPER JOURNEY

Exposure is spread across both online and physical touchpoints, with less reliance on digital alone, indicating a more balanced journey where multiple channels contribute to decision-making.



KEY FINDINGS

KEY FINDINGS



AIRPORTS

- Performance is **conversion-led**, with lower footfall but strong ability to capture shoppers once inside, supported by higher spend.
- Behaviour is more **planned and self-directed**, with shoppers often arriving with clear purchase intentions and relying less on in-store influence.
- Purchases are driven by **value for money, self-treating and gifting**, reflecting a mix of rational and emotional motivations.
- The journey is less influenced by touchpoints and staff, indicating a more **independent and pre-determined decision process**.



FERRIES

- The funnel is **strong and balanced**, with high footfall, strong conversion and solid spend driving overall performance.
- Shoppers combine **value sensitivity with experience expectations**, placing importance on service, assortment and overall shopping quality.
- Behaviour is more **structured but still flexible**, with clear planning complemented by openness to in-store influence.
- **Sales staff play a key role (especially in Beauty)**, with strong interaction and impact helping drive conversion onboard.

AIRPORT VS FERRY

Airports are characterised by a more planned, self-directed and conversion-focused journey, where shoppers arrive with clear intent and rely less on external influence. In contrast, ferries offer a more balanced and interactive environment, where strong traffic, higher engagement and staff influence create greater opportunities to shape decisions and enhance the overall shopping experience.



Thank you!

m1nd set
RESEARCH BEYOND BORDERS



Nordic Travel
Retail Group