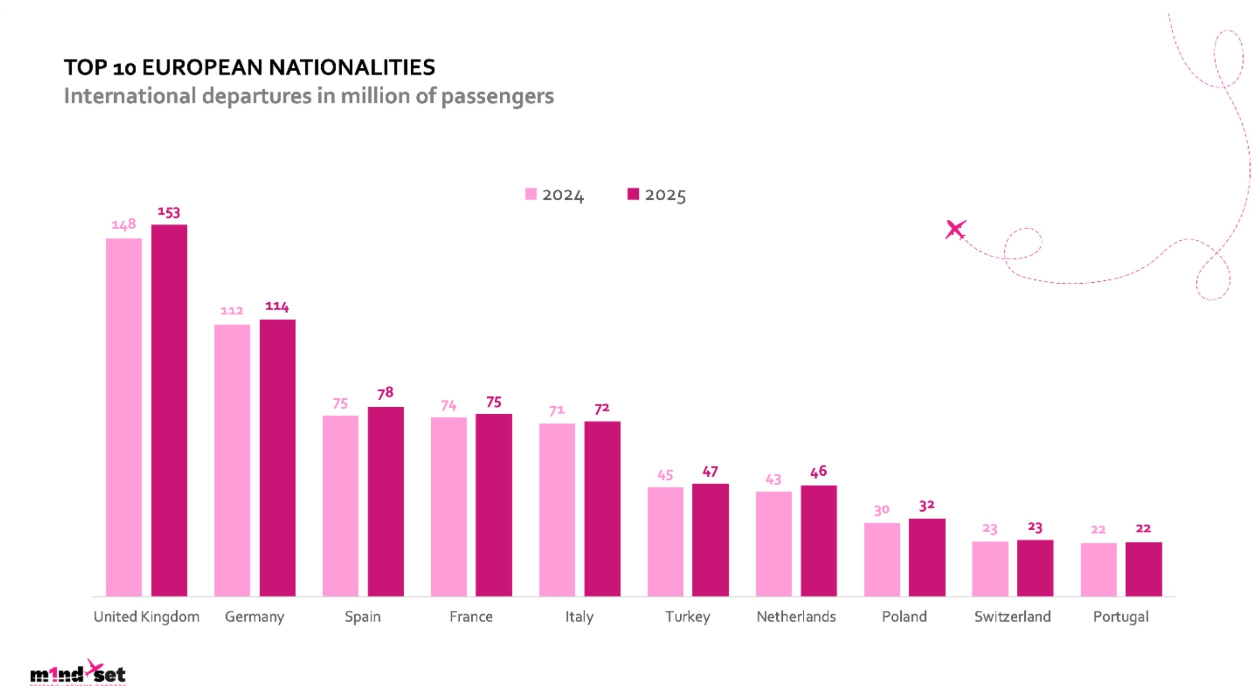
European Travel Retail Market Trends by CEETRA & m1nd-set

Air Traffic Overview

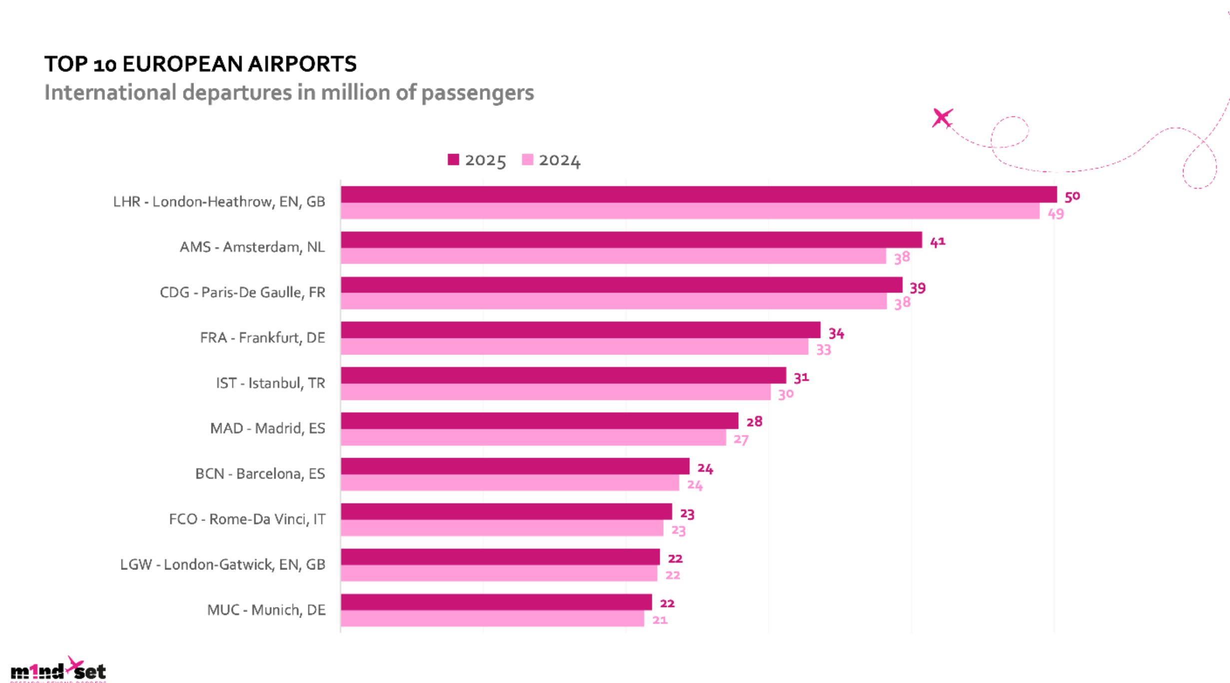
m1nd-set's Business 1ntelligence Service (B1S), reveals that UK travellers rank as Europe's most active international flyers by a clear margin, with more than 150 million international departures (worldwide) set for full-year 2025. Germany and Spain follow in second and third place, with 114 million and 78 million international flights respectively. France (75 million) and Italy (72 million) complete the top five European nationalities for international flights. As shown in Chart 1, Turkey, the Netherlands, Poland, Switzerland and Portugal complete the top ten. When comparing with full-year data for 2024, all top-ten markets experience growth, with Spain, the Netherlands and Poland posting the most robust growth between 5% and 6%.

Chart 1



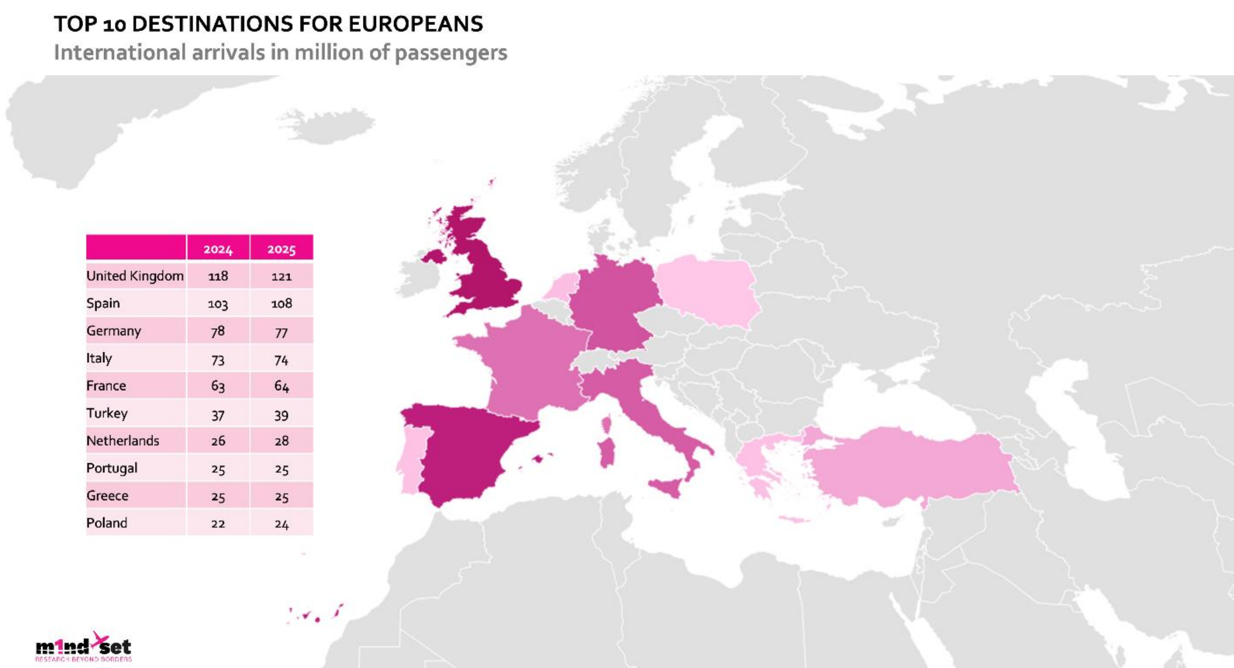
When it comes to Europe's top airports, London Heathrow dominates with more than 50 million international departures scheduled in 2025, far ahead of Amsterdam Schiphol in second place with just under 41 million, notably 7% higher than in 2024. Paris Charles de Gaulle follows in third with 39 million international departures, while Frankfurt (34 million) and Istanbul (31 million) secure the fourth and fifth spots respectively. The remainder of the top 10 European airports include Madrid, Barcelona, Rome Fiumicino, London Gatwick, and Munich, as illustrated in Chart 2.

Chart 2



As for destinations, which includes home-country international arrivals, the UK is also the most visited European destination among European travellers, attracting over 121 million arrivals in 2025. Spain ranks second with nearly 108 million, followed by Germany (77 million), Italy (74 million), and France (64 million). The second half of the top ten sees significantly lower volumes, starting with Turkey (39 million) in sixth place, and ending with Poland (24 million) in tenth, following the Netherlands, Portugal, and Greece. Poland and the Netherlands will experience the most robust growth at +8% and +7% respectively compared to 2024.

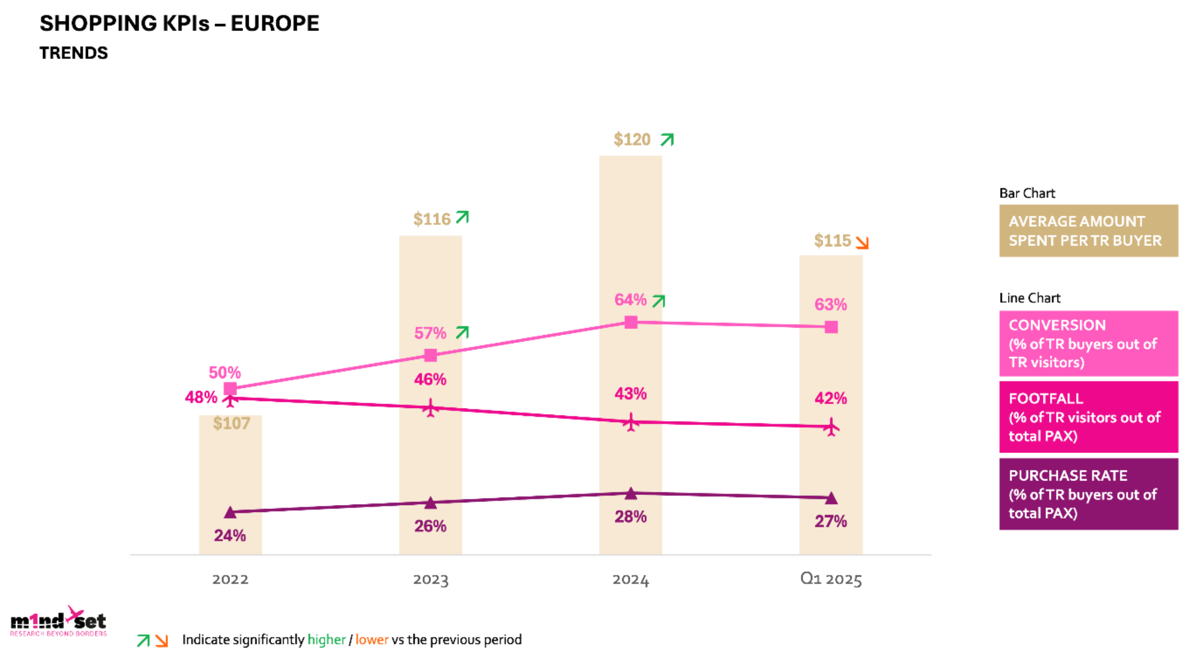
Chart 3



Travel Retail Shopper KPIs

When looking back at the tendency to visit and shop among European international travellers over recent years, we see mixed results. While footfall has declined gradually, from 48% in 2022 to 42% in Q1 2025, conversion has steadily risen, from 50% in 2022 to 63% in the first quarter of 2025. As a result, we see an increased purchase rate of 27% this year compared to 24% in 2022. Further positive news is that average spend among European shoppers has also increased steadily to reach US$ 120 in 2024, up from $107 in 2022. It has dropped slightly to $115 in the first quarter of 2025, but the full year picture may show a more positive result after the summer holiday spending spree is factored in.

Chart 4



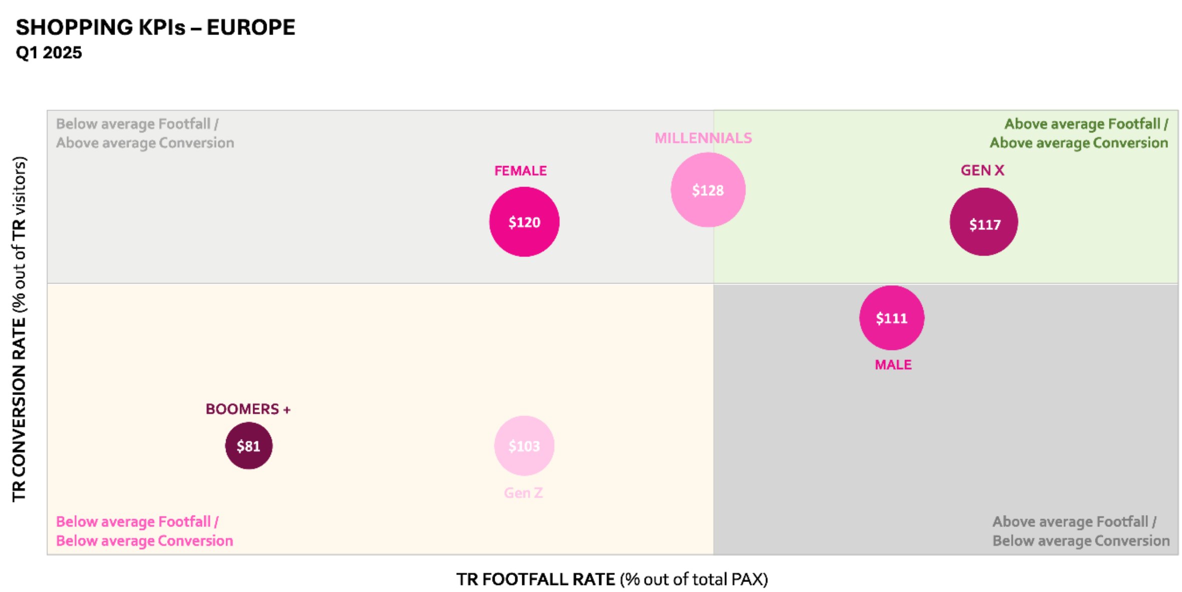
When breaking down the data by shopper age and gender segments, we observe some interesting variations. In Q1 2025, female shoppers seem to be browsing the shops more than men (44% vs 40%) but converting less (62% vs 65%). They are also spending less than men this year - $111 vs $120. Looking at the differences among age groups, Boomers (Seniors) are the least inclined to visit the shops and are shopping and spending the least compared to all other age groups.

As shown in Chart 4, less than four out of ten Boomers enter the store, and less than six out of ten shop when inside the store, spending only $81 on average. Millennials and Middle-aged Gen Xers on the other hand are visiting the shops and both shopping and spending more than the other generations. Gen X travellers have a higher tendency to visit the shops (45% vs 42%), while Millennials shop more (66% vs 65%) and spend more ($128 vs $117). As for the younger Gen Zs, four out of ten visit the stores, and just under six out of ten shop, spending $103 on average.

Who's Visiting Travel Retail? The New Profile

When comparing the evolution of the profile of Travel Retail visitors among European travellers over the years, we see that while men tended to visit the shops more than women in 2022 (62% vs 38%), the tendency has reversed with females being the more dominant gender among Travel Retail visits in 2025 (56% vs 44%). As for age-groups, it is interesting, albeit unsurprising, to see that Gen Zs have almost doubled their representation among Travel Retail visitors since 2022, from 9% to 17% in 2025. Gen Xers and Boomers are declining in representation from 52% and 16% to 36% and 12% respectively. Millennials on the other hand now represent 35% of all Travel Retail visitors among Europeans.

Chart 5

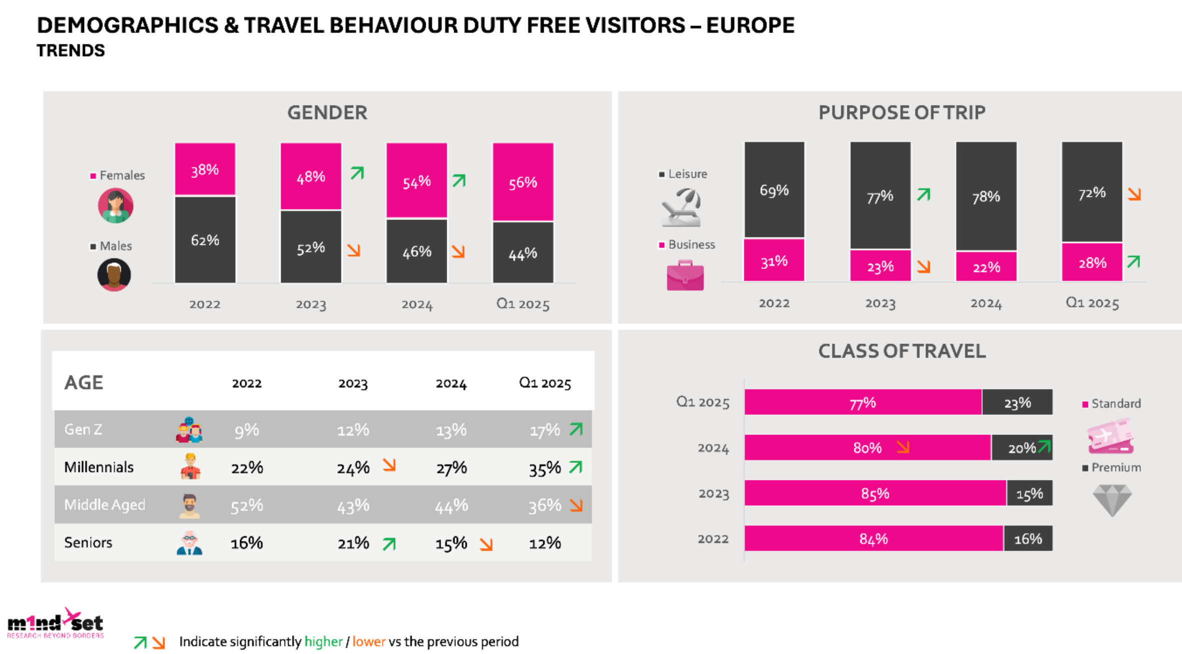


Another interesting trend is the evolution of the breakdown of Travel Retail visitors by travel class over recent years. Economy travellers represented 70% of all Travel Retail visitors in 2022; their share has declined over the years to 61% in 2025, while travellers in premium economy, business and first class have increased their representation among visitors to 17%, 15% and 8% respectively.

Experience is Everything

Much ink has been spilled over the impact and importance of experiential Retail in the Travel Retail environment. The importance of experiential elements is also evident among European travellers, given the declining importance of price & promotions as a driver to visit the stores – from 55% in 2022 to 50% in 2025 – and the increasing impact of the store attractiveness, up from 22% in 2022 to 28% in 2025. The increasing tendency among Europeans to browse the stores also testifies to the retail environment's growing attractiveness – up from 65% to 74% over the period.

Chart 6



As with the drivers to visit the stores, purchase drivers also reveal the growing importance of experiential retail for European shoppers, with strong variations by shopper segment, age-groups in particular. The in-store experience is the number one purchase driver at 47% in 2025, up from 44% in 2022, with Value in second place at 44% in 2025 – a 2% increase on 2022. Boomers are the most influenced by the in-store experience in 2025, 15 points above average at 62%;

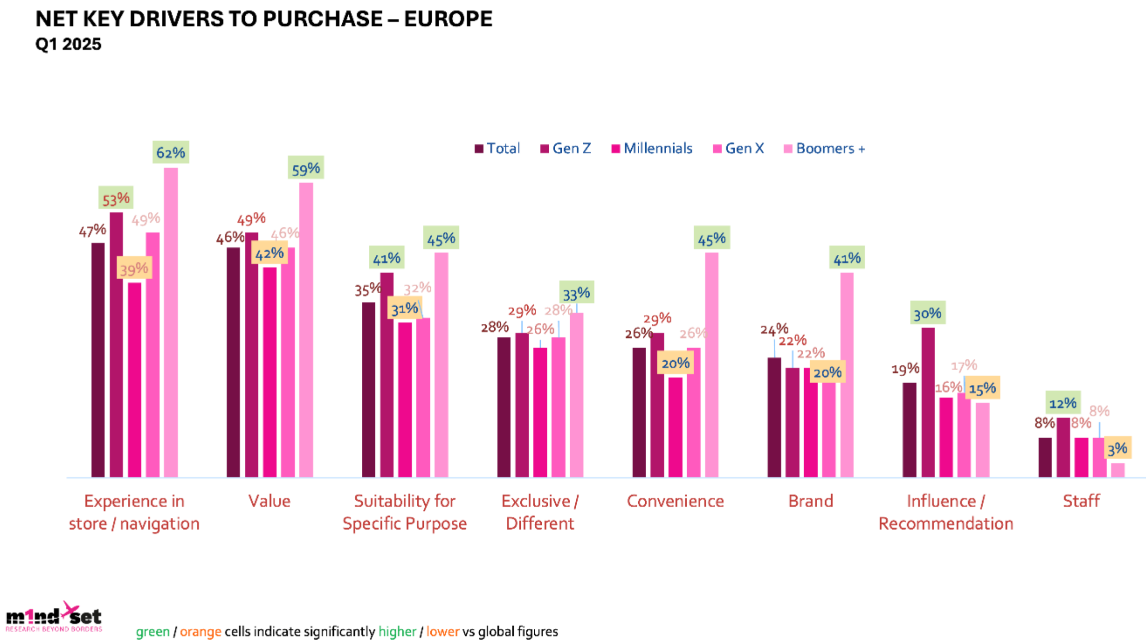
Gen Zs (53%) also show above average tendency to be driven by the in-store experience.

The highly connected European Gen Z shopper segment is, unsurprisingly, also influenced more than other generations by recommendations from their entourage (30% vs 19% on average) as well as by staff inside the store (12% vs 8% on average). The Boomers segment among European shoppers also tends to be more driven by value (59% vs 46% on average), convenience (45% vs 26%), a specific brand (41% vs 24%) and suitability for a specific purpose (45% vs 35%).

The European Buyer

Just as we've seen shifts in the profile of Travel Retail store visitors, a similar change is taking place among European shoppers who actually make purchases, with evolving demographics reshaping the buyer landscape. The ratio between male and female shoppers has evolved in line with the visitor profile with a higher proportion of female purchasers – 54% in 2025 compared to 41% in 2022. The proportion of buyers who are travelling for business has declined from 34% to 25% over the four-year period, while paradoxically, the share of shoppers travelling premium class has increased over the same period, from 32% to 42%. The percentage of Travel Retail buyers travelling in premium economy has also increased marginally from 16% to 17% while buyers travelling economy class are on the decline, falling ten points to 58% in 2025.

Chart 7

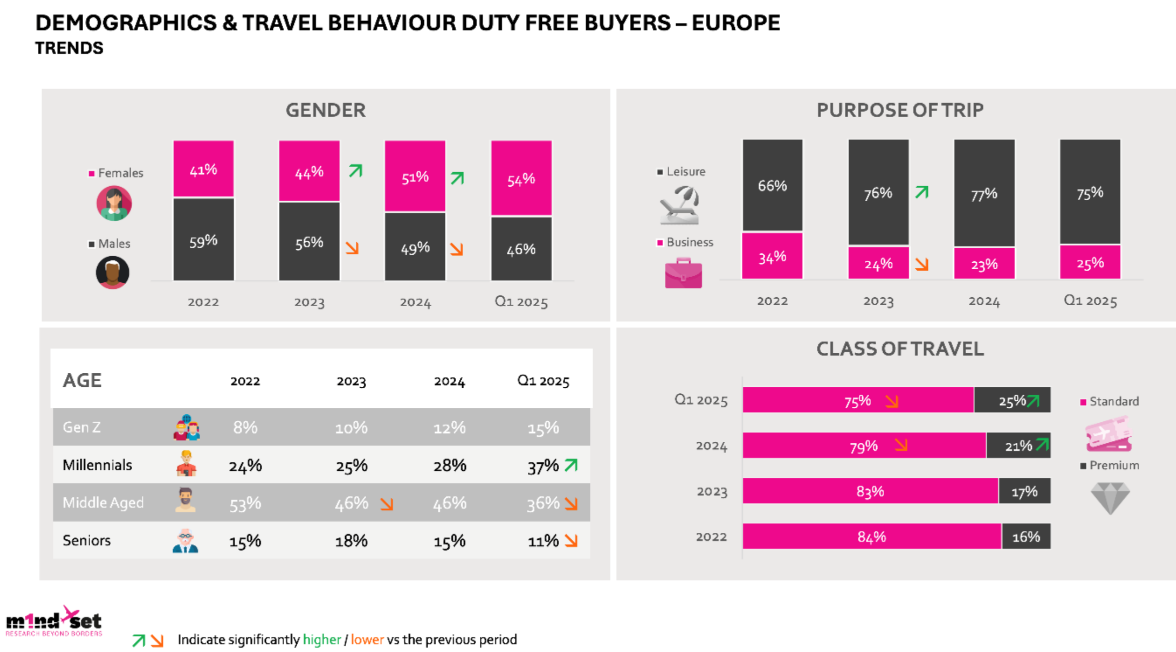


As with the visitor profiles, the typical European Travel Retail buyer profile is also getting younger. The percentage of Gen Z and Millennial buyers from Europe has increased across both age groups over the past four years, from 8% and 24% respectively, to 15% and 37%. The proportion of European Gen Xers among Travel Retail buyers on the other hand has fallen from 53% to 36% and Boomers now represent only 11% of buyers in 2025, compared to 15% in 2022.

What's in the Basket?

The shift in the typical Travel Retail basket and, in some cases, average spend per category, is also interesting to observe among European shoppers over the past four years. Focusing on the core categories, we see that the Beauty and Food & Confectionery categories have both seen healthy growth among European shoppers over the past four years, up from 39% to 47% for Beauty and 28% to 38% for Food & Confectionery. Alcohol has also seen moderate growth – up by 2 points – while Tobacco has declined in importance for European shoppers falling 5 points from 23% to 18%. Europeans are purchasing less Souvenirs & Gift items also – down from 11% to 6%, but moderately more Europeans are purchasing Clothing & Accessories, up from 6% to 8% between 2022 and 2025.

Chart 8



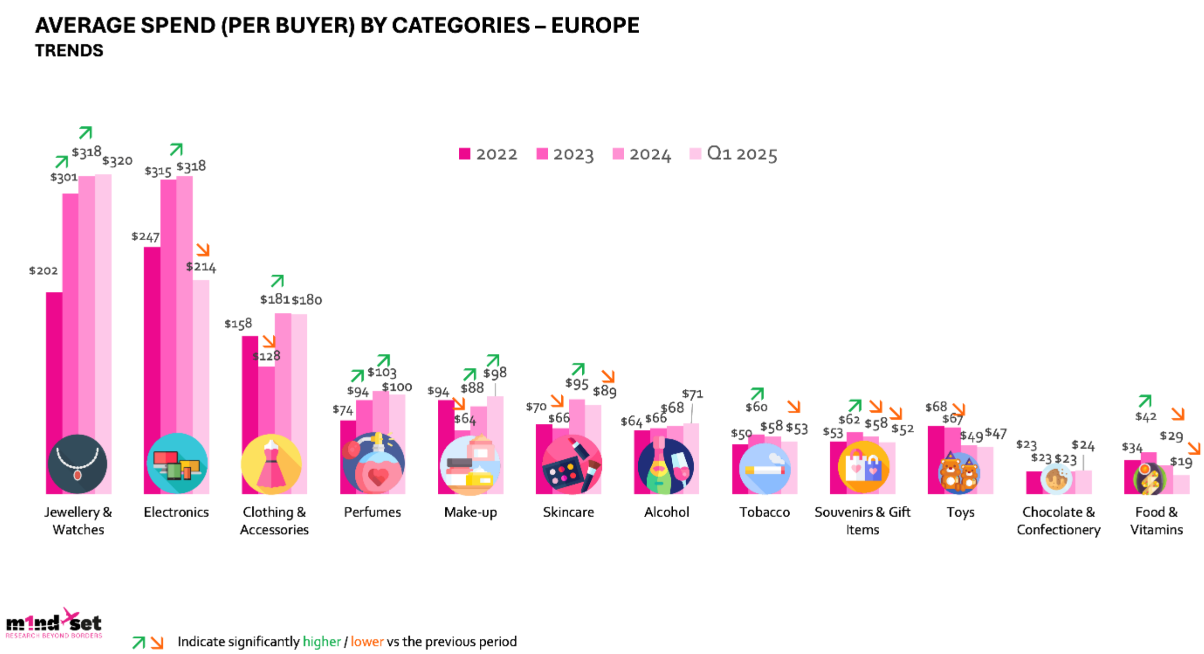
In terms of average spend per category by European shoppers, there are clear winners and losers among the categories. Europeans are clearly seduced by the Beauty offer, not only purchasing more but spending more: $113 in 2025 compared to $82 in 2022. The biggest hike in spend by European shoppers can be seen in the Jewellery & Watches category; Europeans are spending an average of $320 on the category in 2025, up significantly from $202 in 2022. The Clothing & Accessories category is also attracting higher spend among Europeans - $180 vs $158 in 2022 – and Alcohol average spend has also increased moderately over the period, from $64 to $71. Conversely, average spend on Media, Travel Accessories, Toys and Electronics has declined between 2022 and 2025, as Chart 8 illustrates.

Turning to some of the outliers in terms of spend per category, we see that middle-aged Gen Xers are spending significantly above average on Jewellery & Watches in 2025 - $390 vs 320 – as well as on Electronics - $270 vs $ 214. Millennials are also spending above average on Jewellery ($335) as well as on Clothing & Accessories ($272).

Why They Buy: Generational Motivations

While the overall purpose of purchase has fluctuated only moderately over the past four years among European shoppers, with variations of only 2-3%, a deeper segmentation analysis reveals wider fluctuations. Self-consumption overall has increased by 2% between 2022 and 2025, to 54%, gifting has fallen 1% to 23%, purchases for sharing have declined 3% to 17% and on request purchases have increased by 2%, to 6%.

Chart 9



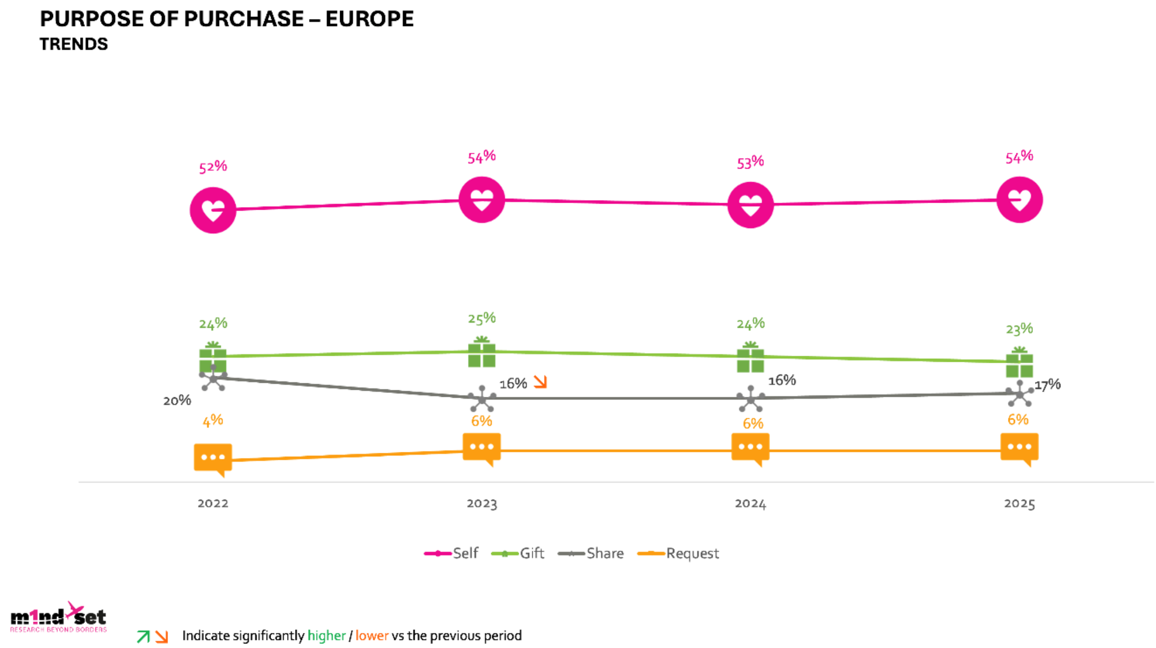
Looking at the purchase purposes by age-group however, we see that both European Gen Zs and Gen Xers have a higher tendency to purchase for themselves in 2025 (56% vs 54%), while Boomers are significantly more inclined to purchase in Travel Retail for gifting (32% vs 23%) but a below average inclination to purchase for sharing (13% vs 17%).

Consequently, it is necessary for retailers and brands to adopt a more segmented communication strategy, highlighting self-indulgence and personal benefit for younger generations, while emphasizing thoughtful gifting options and value-driven propositions for older demographics. Creating clearly curated ranges aligned with these differing motivations and supporting them with relevant messaging both in-store and pre-trip, can help drive stronger emotional resonance and purchase intent across all age groups.

Impulse on the rise

More than three quarters of European shoppers planned their purchases either specifically or partially in 2022. Over the past four years, however, Europeans have become less inclined to plan their Travel Retail shopping, with one third now purchasing on impulse, compared to less than one quarter in 2022. Gen Xers are even more inclined to purchase on impulse in 2025 (35%), while Boomers still remain the most likely to plan their purchases (71% vs 67% on average).

Chart 10



This tendency is further demonstrated by the evolution of when European shoppers start thinking about their purchase. In 2022, 49% started thinking about their Travel Retail shopping purchases once they had arrived at the airport, either before going into the store (16%) or once inside the store (33%). In 2025, however, 52% started thinking about their purchases only once at the airport, albeit less so once inside the store (25%) but more so inside the airport, before entering the store (27%). This indicates that European shoppers are shifting toward more spontaneous shopping behaviour, increasingly influenced by their airport surroundings and in-the-moment triggers. While overall planning is declining, the rise in impulse purchasing, especially among Gen Xers, suggests a growing opportunity for retailers to capture attention through engaging pre-store touchpoints such as airport advertising, digital displays, and experiential zones that spark interest before shoppers even step into the store.

Rebuilding Relevance with European Travel Retail Consumers

To thrive in today's evolving European travel retail landscape, retailers and brands must pivot from transactional selling to emotional engagement, design environments and strategies with the younger, more impulse-driven shopper in mind, and rethink how value, exclusivity, and service are communicated and delivered.

Actionable next steps to woo the European shopper

While footfall declines, rising conversion and spend point to higher-quality engagement. Both conversion and average spend are on the rise, meaning those who do enter are more willing to shop. It is key to focus marketing efforts on bringing higher-potential shopper segments such as Millennials and Gen Z shoppers into the store through pre-travel engagement and airport media. It's also important to target the high-value segments, namely the Millennials and Gen Xers who show the highest spend levels, especially in Alcohol, Jewellery, and Clothing.

Targeted campaigns around these categories, highlighting value, exclusivity, and gifting potential will help counter the falling footfall and maintain the growing conversion and increased average spend. With more women and premium travellers (business and premium economy) visiting and shopping in Travel Retail, brands should adapt messaging and product ranges to appeal to these increasingly influential segments. As Gen Z shoppers are the most likely to interact and Millennials are the most influenced by staff, a more segment-targeted service approach could help regain trust and value in the in-store experience and ultimately reverse this concerning trend. This could include, for example, personalized engagement training tailored to generational shopper preferences such as quick, informative interactions for Gen Zs. Gen Zs respond well to brief, informative interactions, while Millennials are more likely to be influenced by staff recommendations.