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Navigating the Airport Commercial Journey

F&B and Retail Behaviour Generational Differences

IAADFS 2026, ORLANDO

m1ndset
RESEARCH BEYOND BORDERS



About m1nd-set

The worldwide leader in travel market research

m1nd-set, founded in 2007, is the worldwide leading agency in travel research, based in Switzerland. Our key sector of activity is **travel retail, airline, and airport** research & consulting.

m1nd-set has conducted **over 1.500 qualitative and quantitative research studies** around the world, and has successfully provided marketing intelligence to over 95% of the leading brands in Travel Retail.



m1nd-set is the **leading research agency in the area of air travel**, with the special strength of providing their clients with tailor-made research, analysis, actionable results and recommendations.



With **airside access to over 60 airports worldwide**, m1nd-set can easily reach international air travelers.



We have conducted **more than 3 Mio interviews over the last 15 years** with travelers at airports around the globe.



Business Intelligence Service (**B1S**) is m1nd-set's flagship product, conducted since 2016, providing **travel retail insights** through **global air traffic data** across 1.500 airports and shopper behaviour across key duty-free channels.

Background & Methodology



OBJECTIVES

The F&B and Retail Syndicated Study aims at **deep-diving into key dynamics shaping airport commercial behavior**.

The focus of this presentation is **North American Airports**.



DATA COLLECTION

Online with respondents from **m1nd-set's existing traveller panel**, recruited in person at key international airports' departure gates per region.

They are surveyed online **within four weeks of their trip**, ensuring high reliability, consistency and comparability across regions.



TARGET GROUP

- **North America: N=1'000**

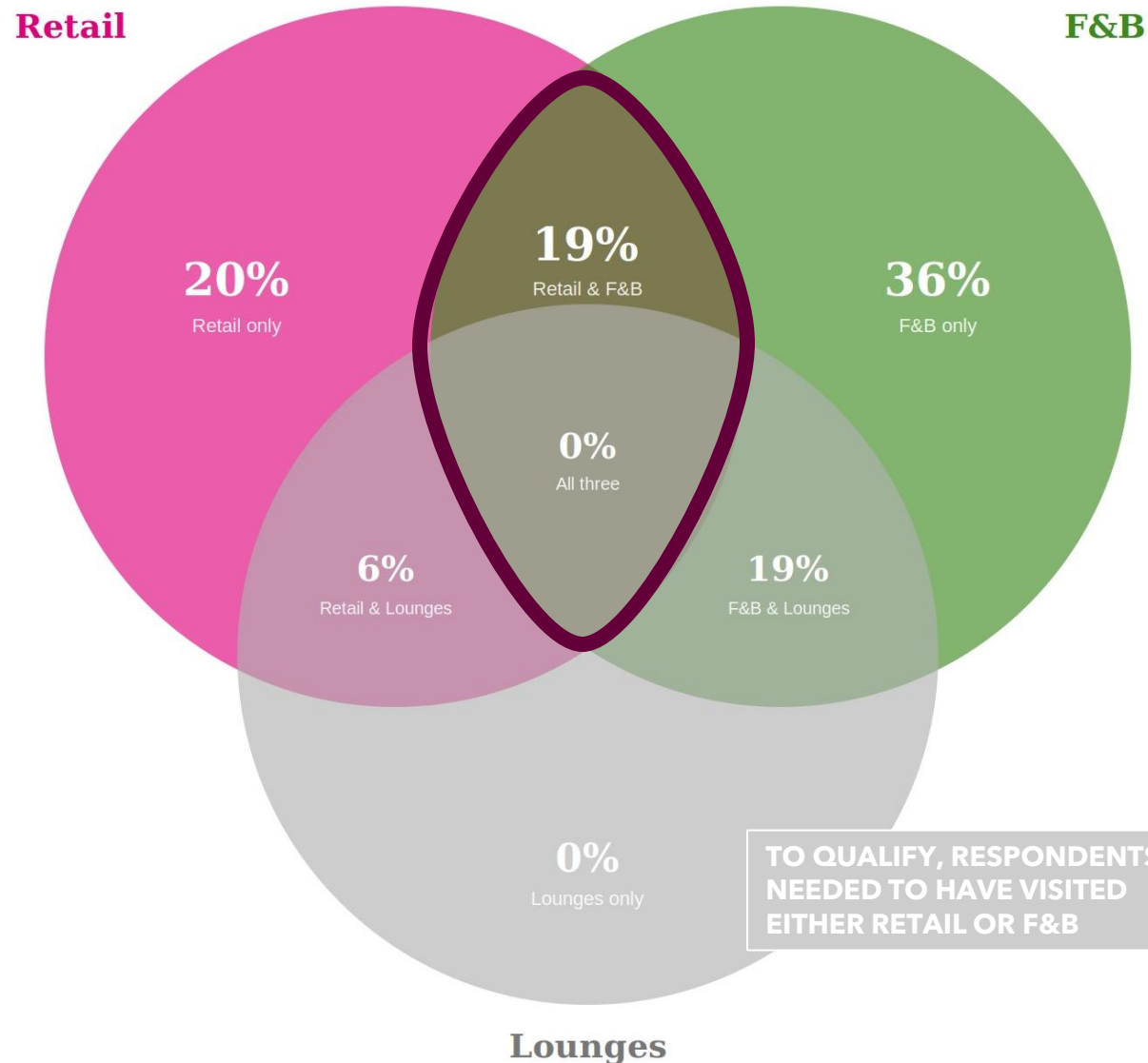
To qualify, respondents needed to be **visitors of at least retail or F&B in one of the airports** they flew through on their last trip.

The data is also available for all other world regions, each with a sample of N=1000



**80%+ of North
American Airport
Journeys End With
Only One Category
Visited – A Major
Opportunity**

MINORITY OF DUAL VISITORS IN NORTH AMERICAN AIRPORTS



TO QUALIFY, RESPONDENTS NEEDED TO HAVE VISITED EITHER RETAIL OR F&B

Total Retail Visitors	45%	58%
Total F&B Visitors	74%	72%
Dual Retail and F&B visitors	19%	30%

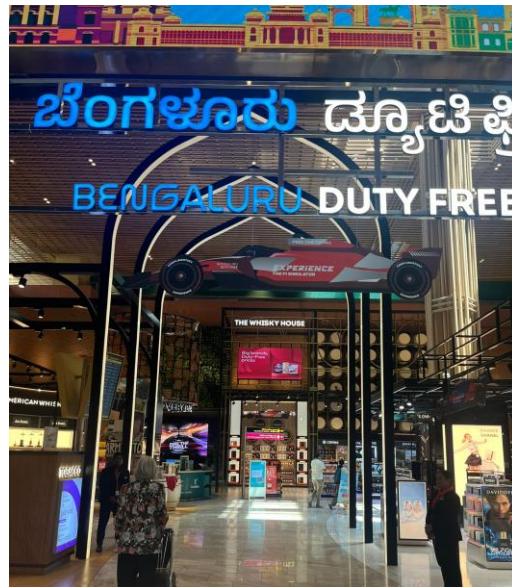
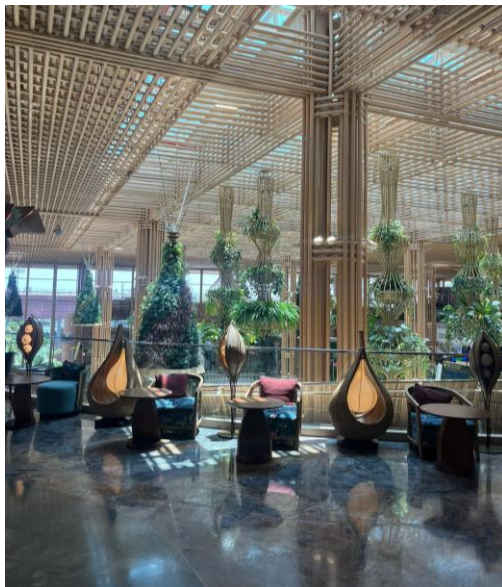


Challenge: Dual Retail and F&B visits are less frequent in North America vs global - due to lower engagement with retail, whereas F&B performs strongly.

Indicates Global data

AIRPORTS ENCOURAGING SHOPPING AND F&B EXPERIENCES

Example: Bangalore Airport - India



Live March 2026

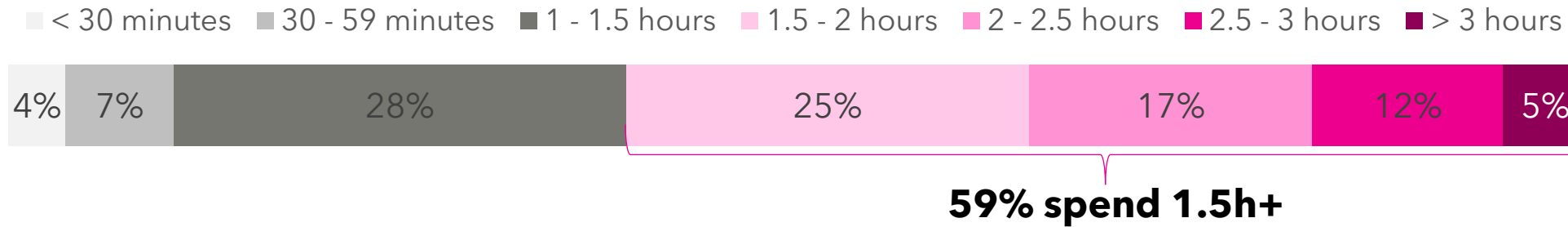




***Time-rich and
Exploratory:***
**North American pax
are an ideal target
for Dual Engagement**

LOW TIME PRESSURE IN NORTH AMERICAN AIRPORTS

TIME SPENT AIRSIDE



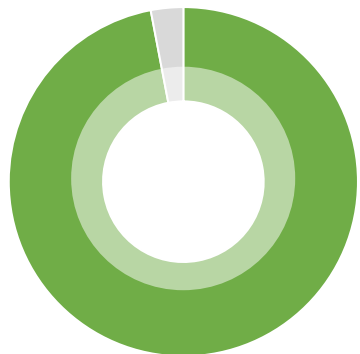
Avg: 1h42



GenZ tend to spend significantly **longer** time airside (1h52)

Alcohol (1h54) and **Perfumes** (1h52) buyers also spend more time than average.

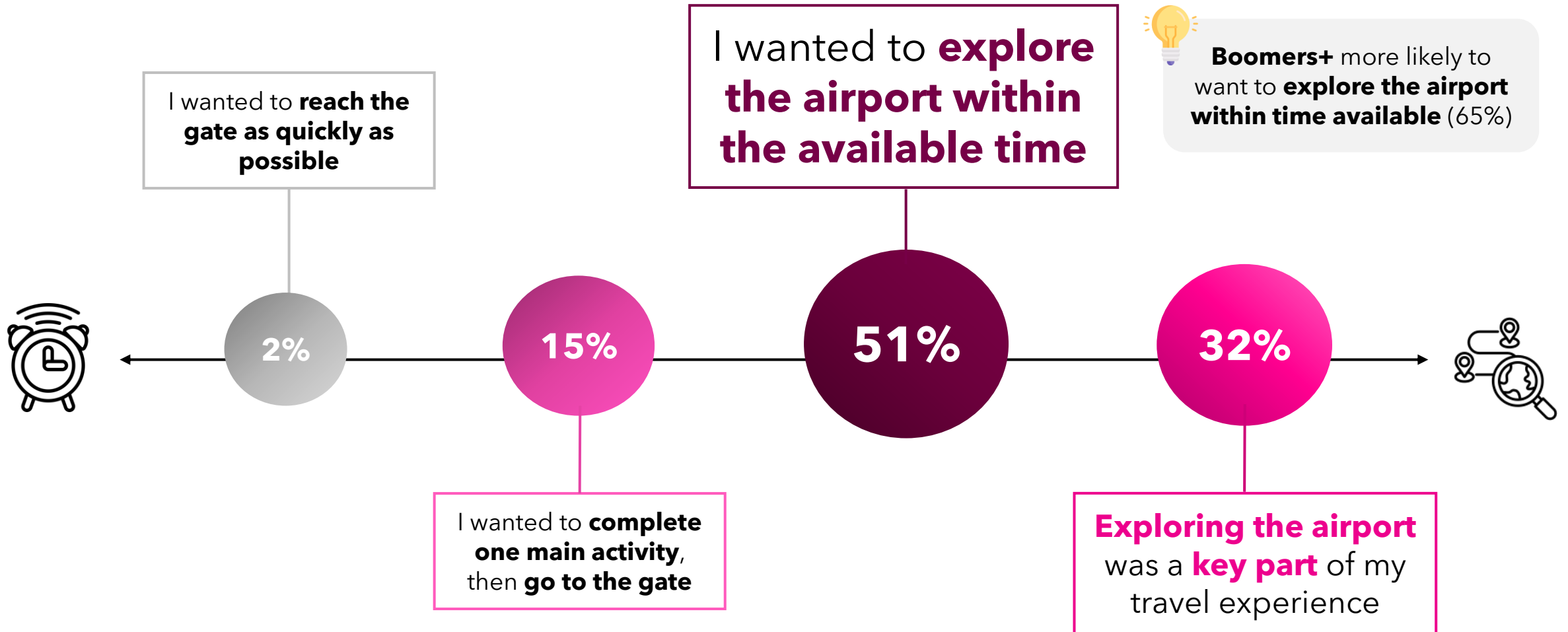
PERCEIVED TIME PRESSURE



96%

DON'T feel time pressure while at the airport
(i.e. have enough / plenty / more time than needed)

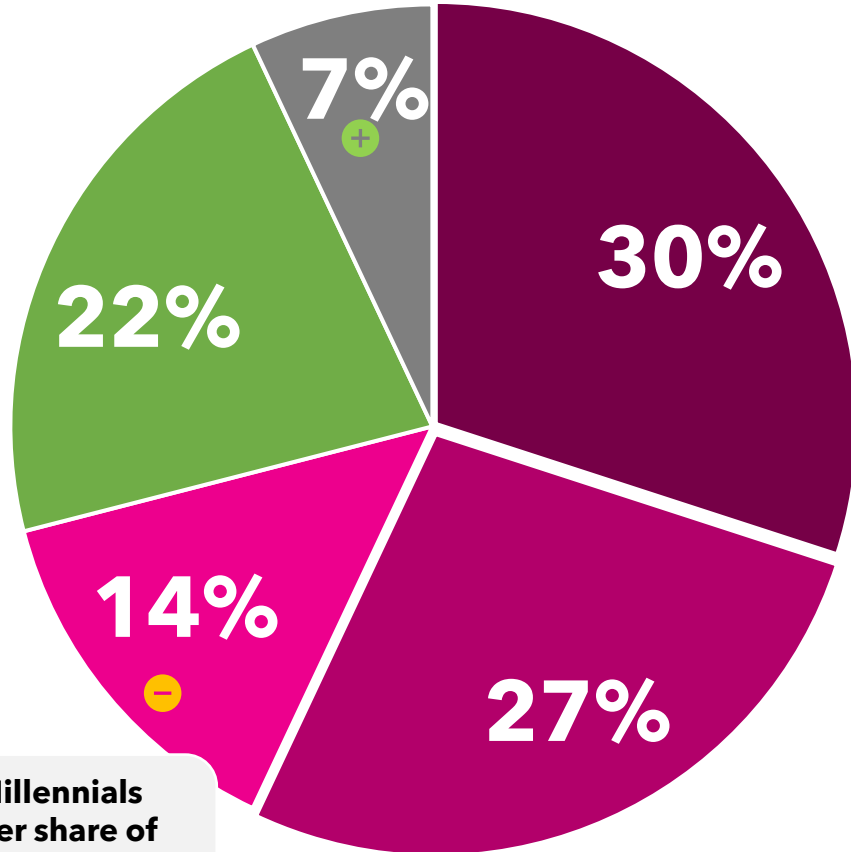
EXPLORATORY MINDSET AT NORTH AMERICAN AIRPORTS



OPPORTUNITY TO TRANSFORM WAITING TIME INTO RETAIL AND F&B ENGAGEMENT



GenZ spend the lowest share of their time in lounges (2%)



57% of the time spent waiting / seating!

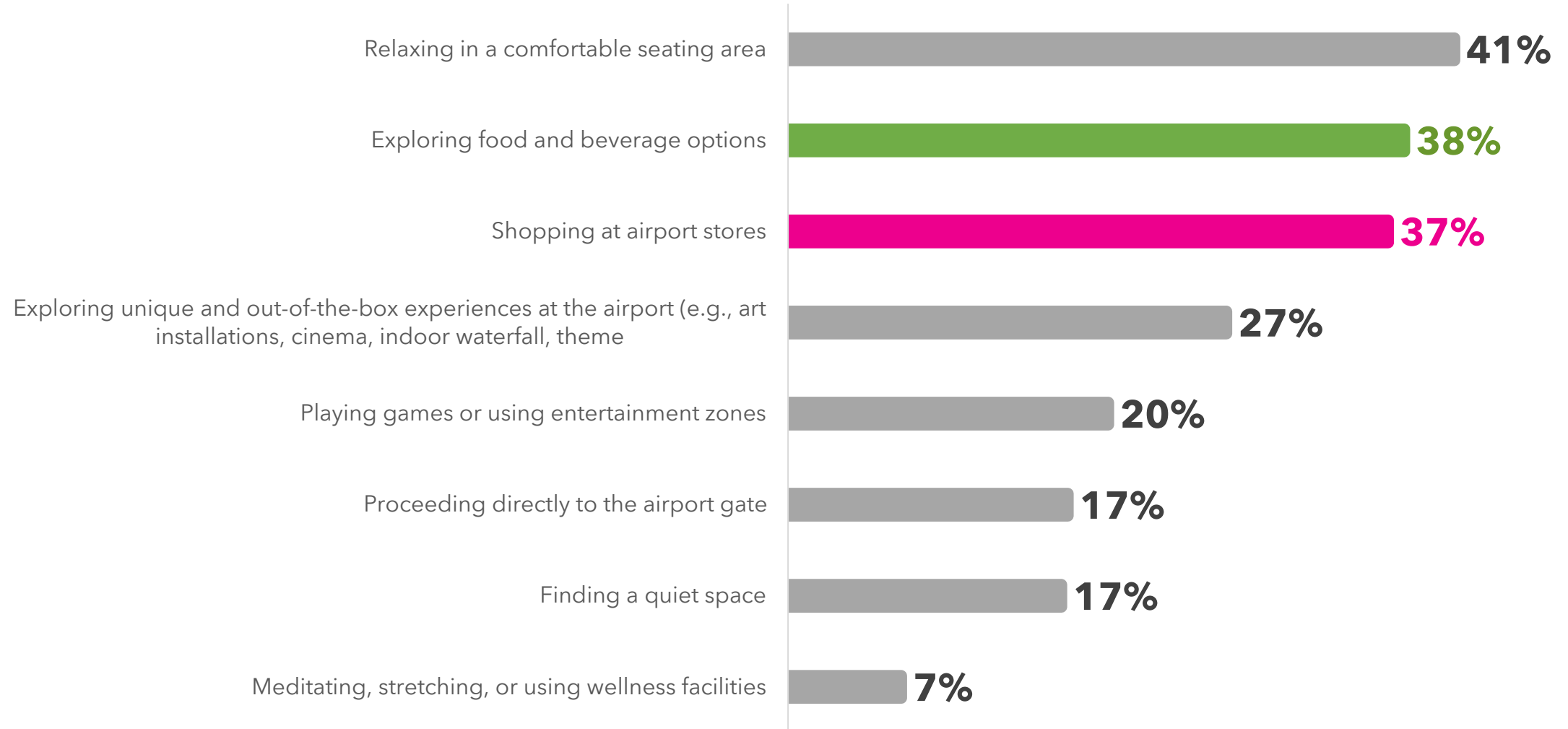
- Seating and waiting areas
- Gate
- Shopping stores
- Food & Beverage facilities
- Airport lounges



GenZ and Millennials spend a **higher share of their time shopping** vs GenX

+ - Indicates significantly higher/ lower vs Global

F&B AND SHOPPING RANK HIGH AMONGST TRAVELLERS' PREFERRED ACTIVITIES AT THE AIRPORT



No significant differences vs Global



What drives (and blocks) Dual Visitation?

The barrier isn't time or interest – it's the airport itself.

TRAVELLERS IN NORTH AMERICAN AIRPORTS ARE MOSTLY "FLOW DRIVEN"

42%

FLOW-DRIVEN

Followed natural airport flow, browsing what was on the route



Confectionery and **Souvenirs** buyers are more **flow-driven**, while **fashion** purchases tend to be more **intentional**.

36%

INTENTIONAL

Actively sought out shopping or F&B, even if not on direct route



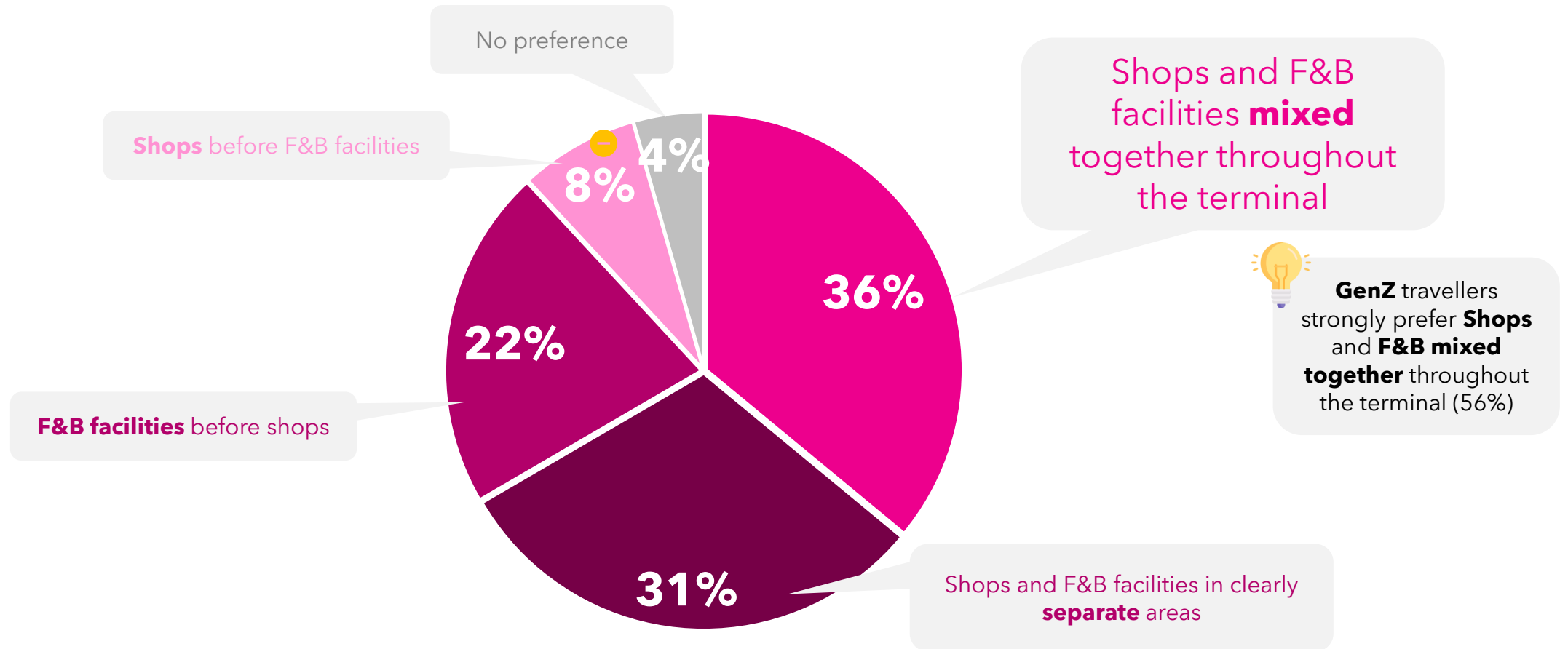
GenZ are more likely to be **intentional** in their browsing (45%). In particular, "actively looking for shopping stores, even if they were not directly on my route to the gate"

22%

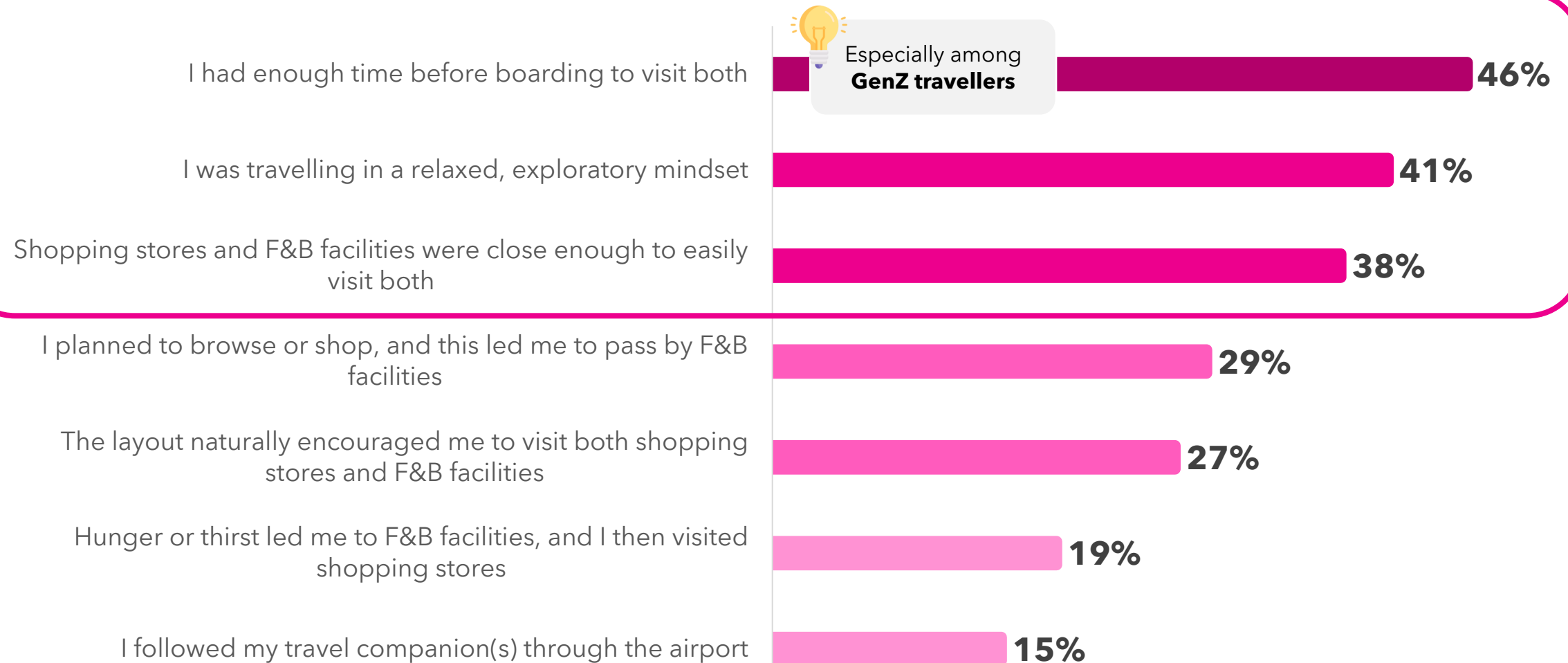
GATE-ORIENTED

Avoided detours, stayed strictly on most direct route to gate

TRAVELLERS PREFER MIXED SHOPPING AND F&B LAYOUTS



TIME AVAILABLE, MIND-SET AND AIRPORT LAYOUT ARE THE KEY DRIVERS OF DUAL VISITS



AIRPORT LAYOUT INSTRUMENTAL IN DRIVING INCREMENTAL HYBRID RETAIL AND F&B SHOPPING



87% would be more likely to visit both if shopping stores and F&B facilities had been better connected or more visible



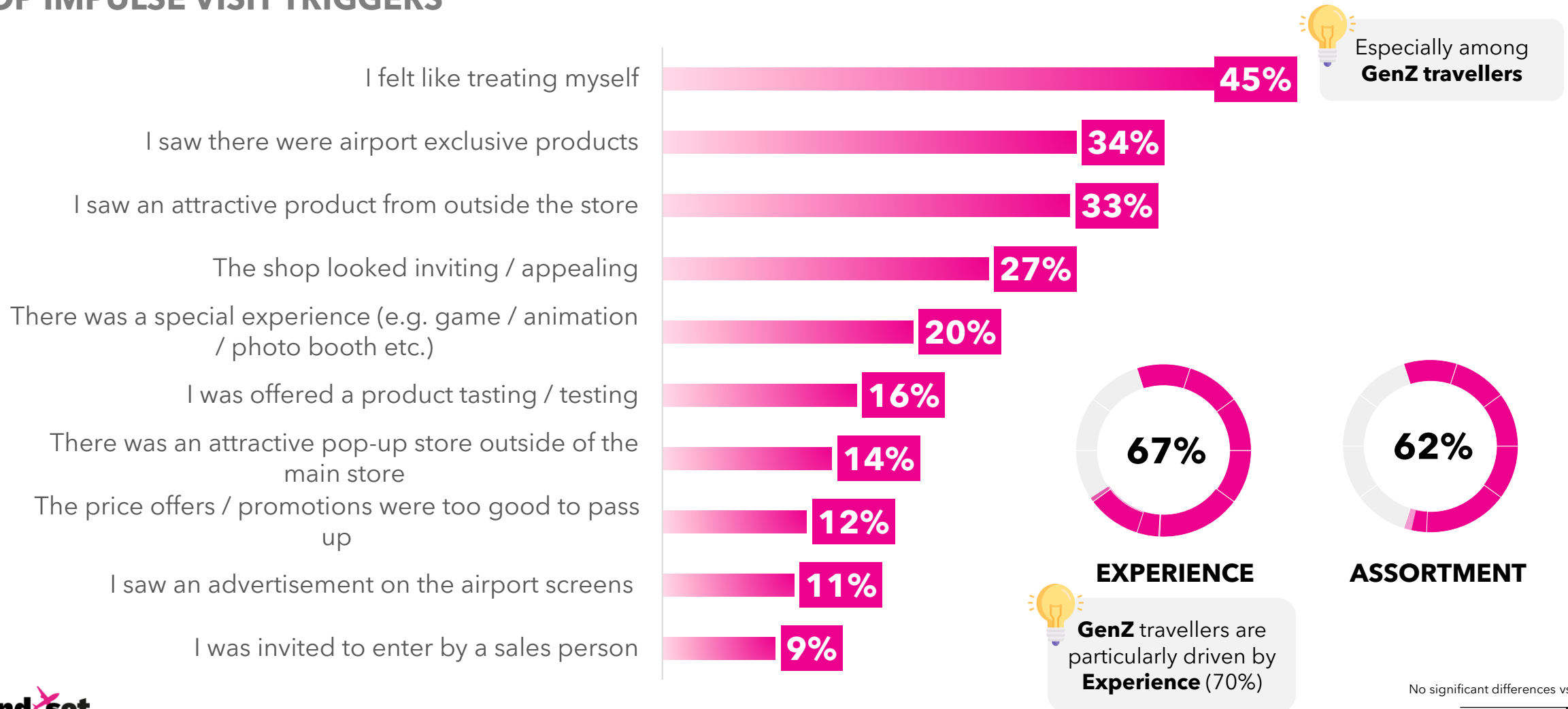
Consensus across all demographic groups



In Retail, Store Environment, Exclusivity and Experience are Driving Forces

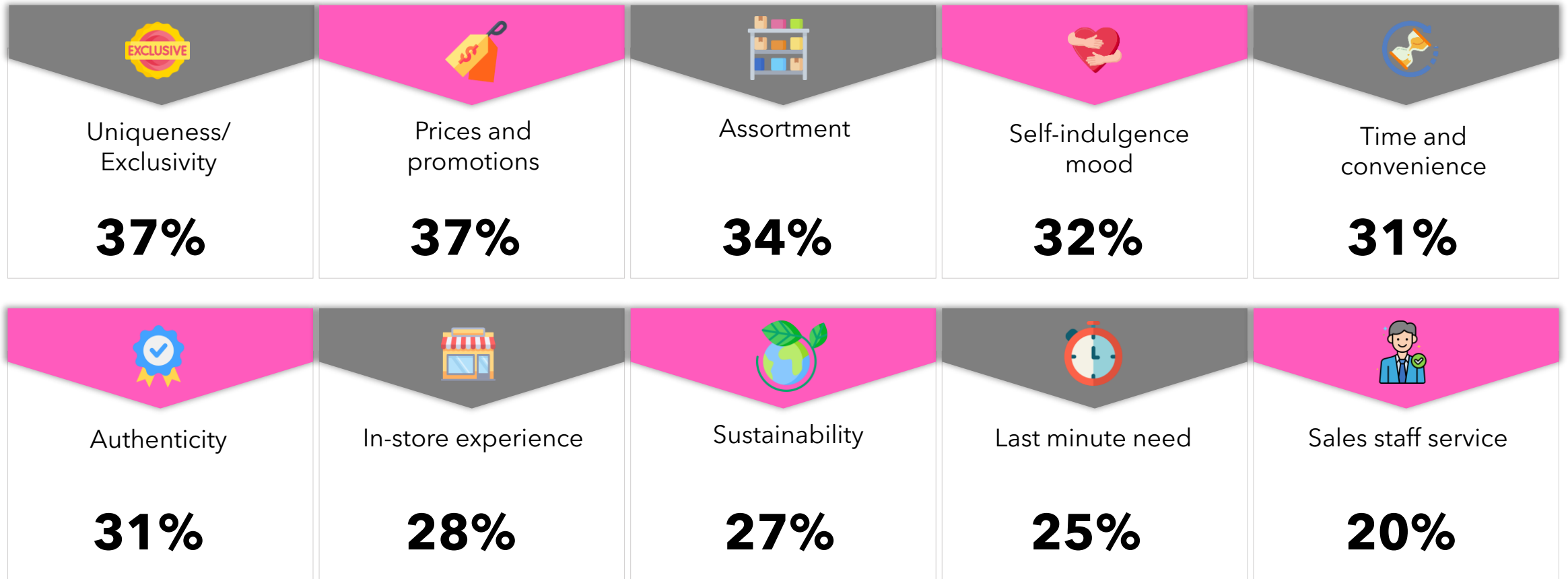
IMPULSE VISITS AMONG NORTH AMERICAN TRAVELLERS ARE MAINLY DRIVEN BY EMOTIONAL AND EXPERIENTIAL TRIGGERS

TOP IMPULSE VISIT TRIGGERS



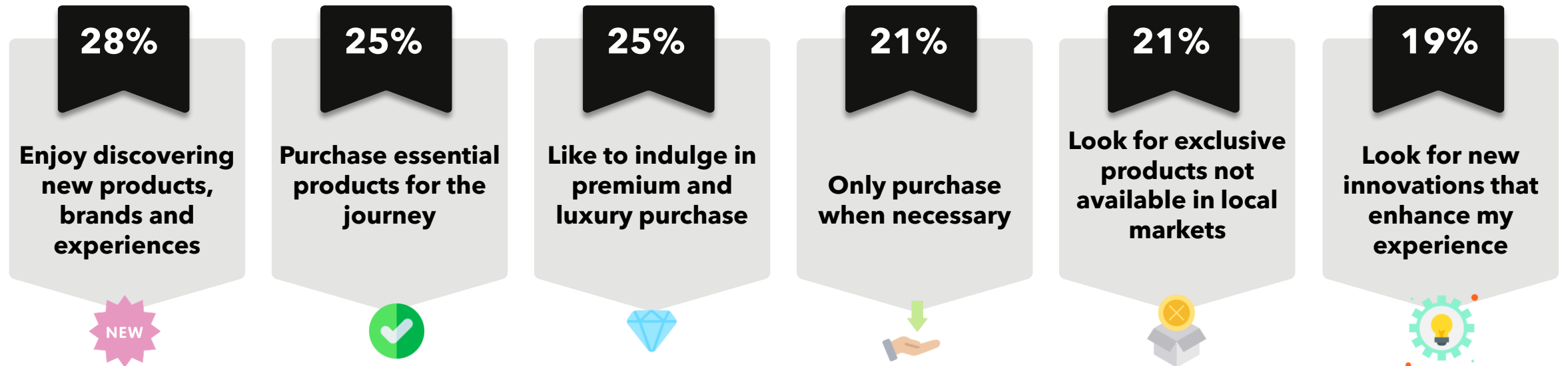
BEYOND VALUE, UNIQUENESS AND ASSORTMENT MOTIVATE TRAVELLERS IN NORTH AMERICA TO VISIT RETAIL STORES

TOP MOTIVATORS TO SHOP AT AIRPORTS



AIRPORT RETAIL IS DISCOVERY-FIRST, WITH EXPERIENCE AND ESSENTIALS SHAPING PURCHASE BEHAVIOUR

TOP ATTITUDES TOWARDS AIRPORT SHOPPING



PREMIUM OFFER AND ASSORTMENT DRIVE RETAIL SATISFACTION, WHILE SUSTAINABILITY REMAINS WEAKEST

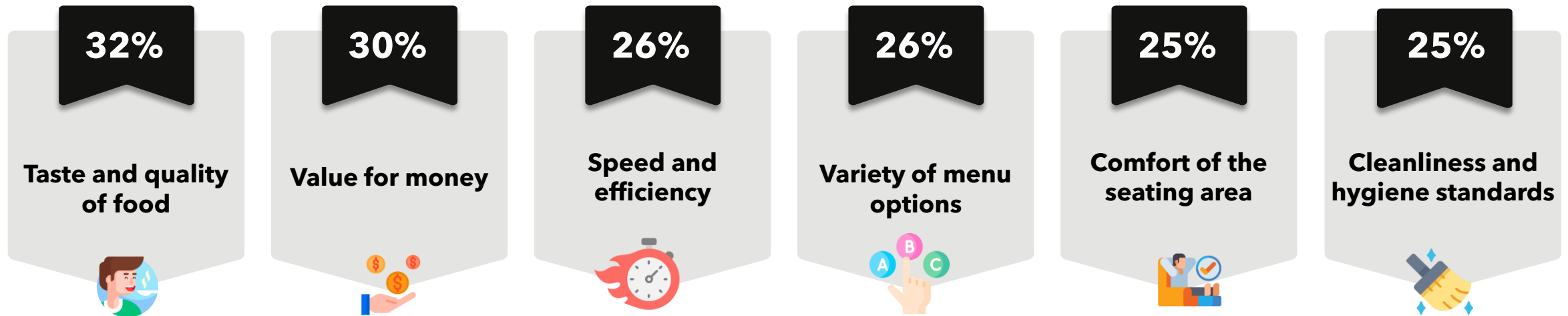
	Total North America	GenZ 18 - 28 y.o.	Millennials 29 - 43 y.o.	GenX 44 - 59 y.o.	Boomers+: 60+
Range of luxury / premium stores	4.1	3.9	4.0	4.1	4.2
Availability of Airport Exclusive products	4.0	4.1	4.1	3.9	4.0
Variety of brands and products	4.0	4.0	3.9	4.1	4.2
Availability of authentic, local products	4.0	4.1	4.0	3.9	4.0
Overall appeal, atmosphere and unique experiences in the stores	4.0	4.1	3.9	4.0	4.0
Ease of finding what I was looking for / ease of navigation	3.9	3.7	4.1	3.9	4.0
Quality of service , level of staff expertise	3.9	3.8	3.9	4.0	4.0
Queues & waiting time in-store	3.9	3.9	4.0	3.9	3.8
Range of affordable / entry-level stores , products and brands	3.9	3.8	3.9	3.9	3.7
Availability of sustainable products	3.6	3.6	3.6	3.6	3.7



Value for Money and Originality / Exclusivity Remain Gaps to Close in Airport F&B Offer

QUALITY AND VALUE SET THE BENCHMARK FOR AIRPORT F&B EXPERIENCES

TOP EXPECTATIONS REGARDING AIRPORT F&B



QUALITY AND VARIETY LEAD IN SATISFACTION, WHILE VALUE FOR MONEY AND ORIGINALITY LAG BEHIND.

	Total North America	GenZ 18 - 28 y.o.	Millennials 29 - 43 y.o.	GenX 44 - 59 y.o.	Boomers+: 60+
Quality of food and beverages	4.3	4.2	4.2	4.4	4.2
Variety of options available	4.2	4.0	4.2	4.2	4.2
Cleanliness of the facilities	4.1	4.0	4.1	4.2	4.2
Staff friendliness and professionalism	4.1	4.1	4.1	4.2	4.1
Design and overall atmosphere of the facility	4.1	4.2	4.1	4.1	4.0
Speed and efficiency of ordering and payment	4.1	4.1	4.1	4.1	4.1
Clarity and visibility of menus	4.1	4.1	4.1	4.1	4.0
Availability of seating	4.1	4.1	4.1	4.1	4.0
Waiting time before being served	4.0	4.1	4.0	4.1	3.9
Value for money	4.0	4.1	4.1	4.0	3.9
Originality / Exclusivity of the offer	4.0	4.1	4.0	4.1	4.0

FAST FOOD AND CAFES & BARS DOMINATE CURRENT CONSUMPTION




Fast food
46%



Fine dining
+ 27%



Cafes & bars
42%


 **GenZ** over-index for **Cafés & Bars** visits (53%)





Take away
15%



Casual dining (with table service)
30%

 **Casual dining** preferred by **travellers with small children** (43%)

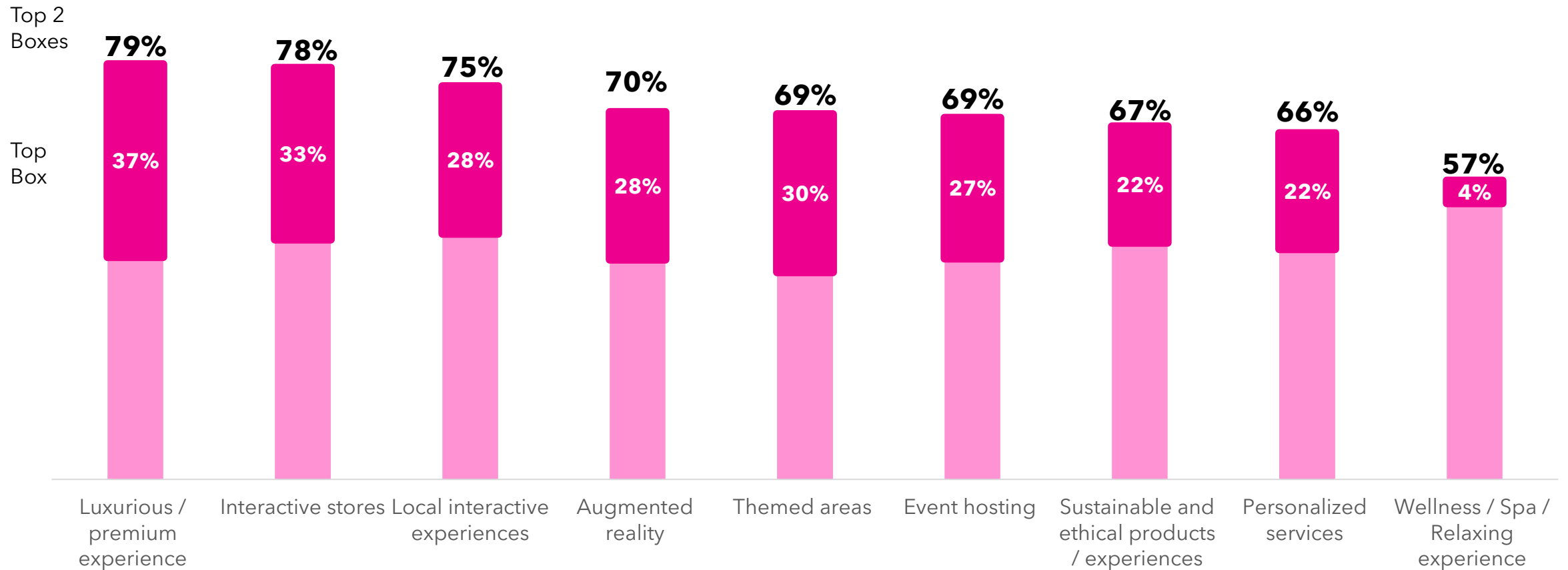
  Indicates significantly higher/ lower vs Global



North American pax want More Than a Transaction – and F&B Is Part of That Experience

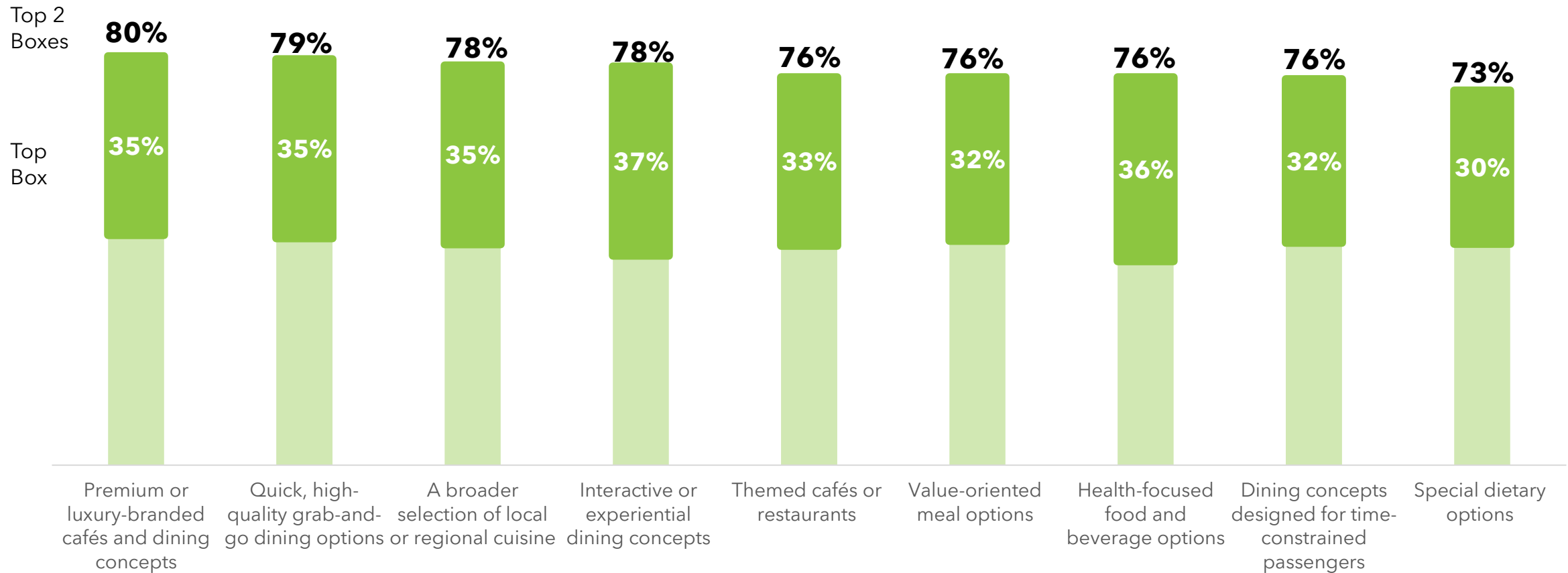
PREMIUM AND INTERACTIVE CONCEPTS LEAD APPEAL, WITH EXPERIENTIAL RETAIL OUTPERFORMING SERVICE-LED FORMATS

APPEAL (5 PT SCALE) OF DIFFERENT RETAIL CONCEPTS



PREMIUM AND EXPERIENTIAL DINING CONCEPTS LEAD APPEAL

APPEAL (5 PT SCALE) OF DIFFERENT F&B CONCEPTS





Hybrid Retail × F&B Concepts Are the Bridge From Single to Dual Engagement

PREFERRED HYBRID CONCEPTS MERGE F&B WITH CHOCOLATE, FASHION AND LOCAL PRODUCTS

PREFERRED HYBRID CONCEPTS (FROM 18 CONCEPTS TESTED)



35%

A **chocolate dedicated area** with in-store dessert bar or cafe



35%

A **fashion of lifestyle brand** with a branded **café or cocktail bar** reflecting the **brand universe**



27%

A **souvenir shop** featuring **tasting stations for local specialties**



27%

A **cultural concept store** blending **shopping, local storytelling and dining**

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Way forward:
Seamlessly integrate F&B elements into retail, and retail into F&B, to create richer, more engaging and mutually reinforcing experiences across the passenger journey.



Gen Z



Gen Z in North America

1

BUSINESS TRAVEL DOMINANCE:

Gen Z alone is expected to make up nearly 70% of business travelers by 2030, up from roughly 40% in 2025.

2

FASTEST GROWING SEGMENT:

Gen Z is currently the fastest-growing consumer segment in tourism.

3

AIR TRAVEL SPEND:

Gen Z travelers alone are expected to account for approximately 30% of all air travel spending by 2030.

4

HIGH FREQUENCY:

Gen Z adults already average 29 days of travel per year, with over half taking three or more leisure trips annually.

5

BLEISURE TRENDS:

Approximately 22% of Gen Z travelers combine business and leisure ("bleisure"), increasing their time spent in airport retail environments vs older generations.

More time, more mix: Gen Z leans into integrated airport environments

1h52

Spend **more time** airside

vs. 1h42 total avg

56%

Strongly prefer **mixed F&B and retail** airport layouts

vs. 36% total avg



Gen Z: intentional browsing, experience-first shopping

45%

More likely to be **Intentional browsers**

In particular, "**actively looking for shopping stores**, even if they were not directly on my route to the gate"

vs. 36% total avg

70%

Browse Retail attracted by the **experience**



Spend more time shopping, and less time at the lounge

Gen Z prioritises cafés & bars within a broader experience-driven path

53%

When consuming airport
F&B, favour
Cafés and Bars

vs. 42% avg

Gen Z is **time-rich** at the airport, **engaged with both F&B and retail** and **experience-led** – major opportunity to drive more dual spending through **better layout, navigation** and **hybrid concepts**.





Gen Z is experience-driven, social and identity-led, prioritising authentic and shareable experiences over traditional value drivers.

What shaped GenZ

Gen Z was shaped by instability, not optimism. Their mindset reflects the environment they grew up in.



Permanent digital connectivity



Economic uncertainty



Global crises as background noise



Constant comparison via social media



How this shaped GenZ as consumers?

Gen Z consumption is cautious, expressive, and social. They balance pragmatism with self-expression.

Gen Z consumer tends to be:

Value-conscious,
but not price-
driven



Emotionally
selective, not
impulsive



Highly influenced
by peers and
culture



Gen Z decision loop: discover, validate, share

For Gen Z, the purchase is not complete until it is shareable; products must survive the social test.



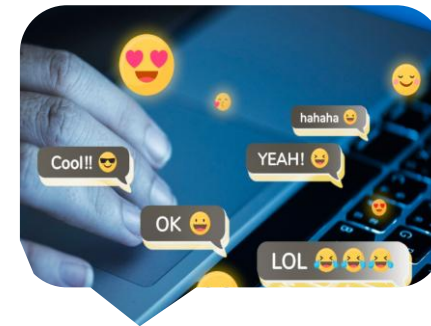
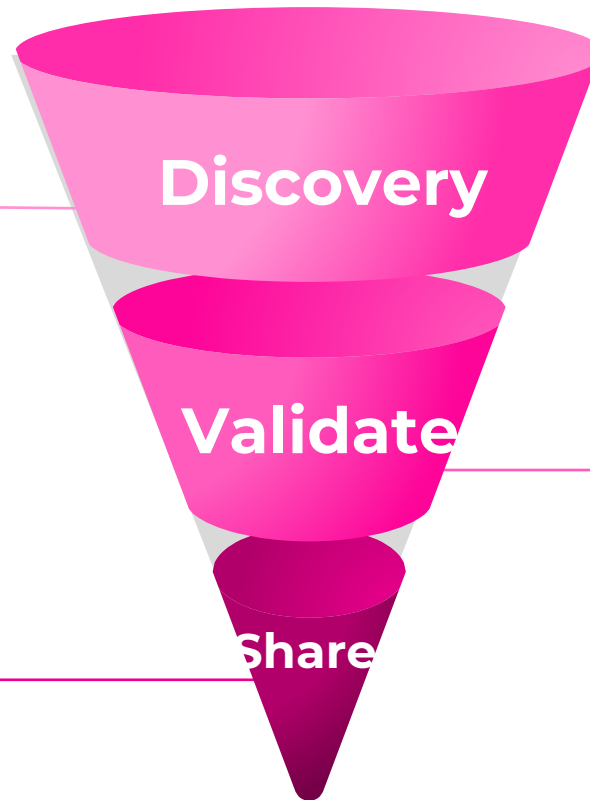
DISCOVERY

Discovery is social-first (via TikTok, Instagram, YouTube), not brand-first



SHARE

Sharing is part of the purchase value and amplifies satisfaction



VALIDATION

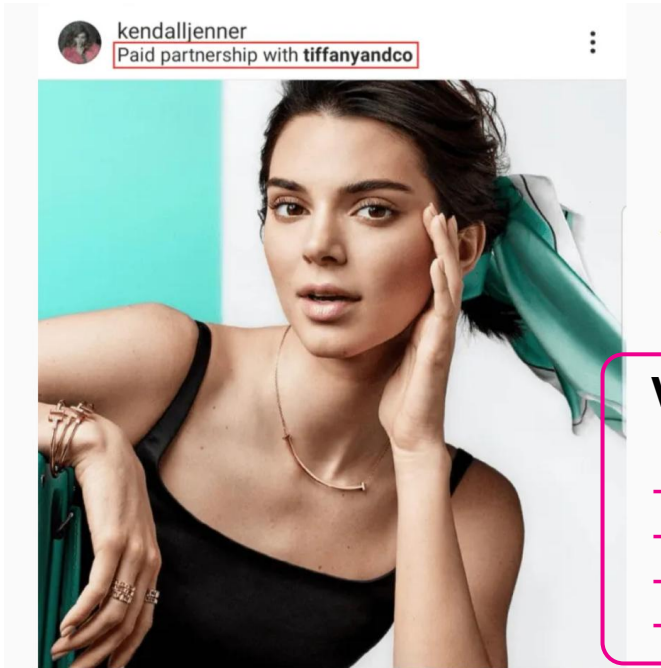
Validation comes from peers (via comments, duets, etc...), not authority

Influencer overload: when visibility turns into fatigue

For **Gen Z**, too much influencer content creates fatigue. Influence only works when it feels credible, selective, and earned scepticism, not desire

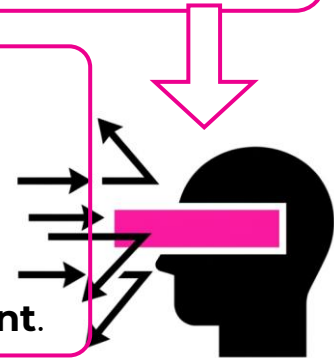
As influencer marketing has scaled, Gen Z has become:

- Highly aware of paid partnerships
- Sceptical of over-promoted products
- Quick to disengage from repetitive hype
- Seeing the *same product everywhere* often reduces trust instead of building it.



What this looks like in practice

- “Sponsored” cues trigger mental filtering
- Overexposed products are perceived as inauthentic
- Trust shifts from *big creators* to *everyday users*
- Gen Z increasingly values **peer behaviour over influencer endorsement.**



Why this matters for brands and travel retail

- ✓ More visibility is not always better
- ✓ Credibility comes from **selective presence**, not saturation
- ✓ Products win when they appear **naturally in use**, not constantly promoted
- ✓ Influence works best when it feels like discovery, not advertising.



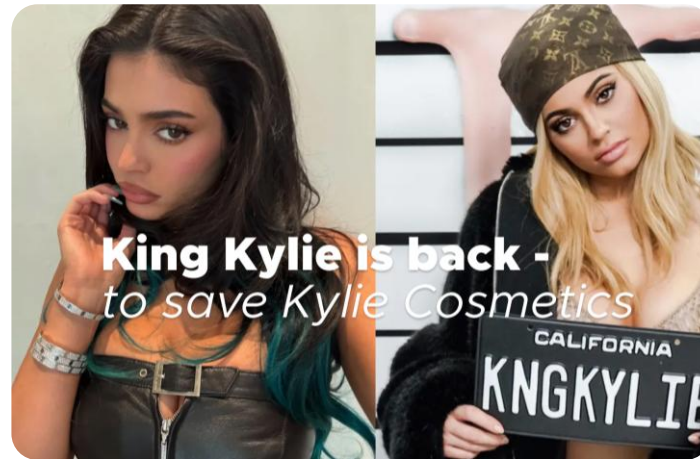
Identity-first consumption: buying is self-expression

Gen Z buys to express who they are, not just to satisfy a need. Products are identity markers: taste, values, cultural fluency.

Brands function as social signals



"Does this fit my identity?" precedes "Is this good quality?"



Aesthetic, story, and values are decision drivers



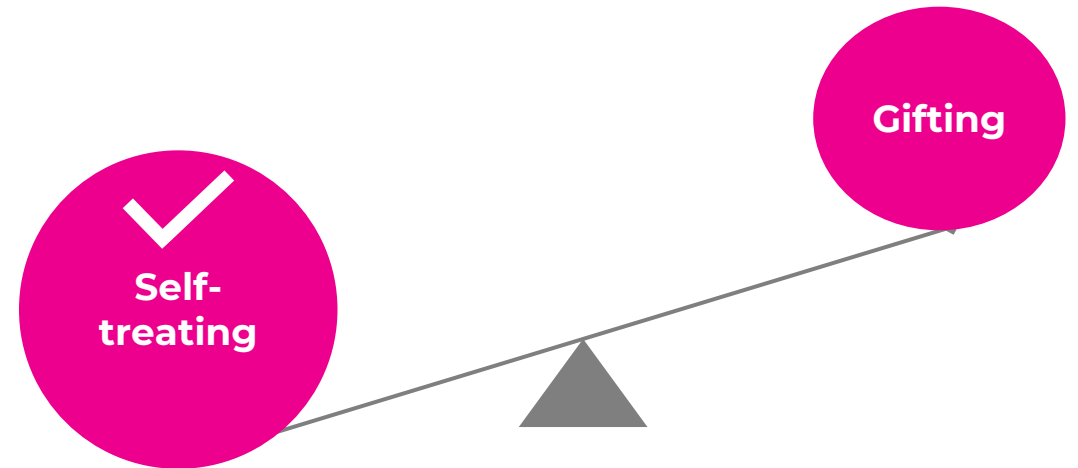
From gifting to self-treat

Gen Z shifts travel retail from gifting to self-reward. The purchase is for “me”, not “for someone back home”.

Emotional reward after stress

Immediate or near-immediate consumption

Personal relevance over obligation



Why it matters ?

Formats should support **immediate consumption**

Messaging should focus on **personal pleasure**, not duty

Packaging can be **less formal**, more expressive

What makes a product a win for GenZ Experience over function (1/2)

Gen Z expects products to create a moment, not just deliver performance. Product value increasingly sits in how it is experienced, not only in what it does.

For **Gen Z**, products create value through:



Sensory contrast

Visual, tactile, or auditory differences that are immediately felt

Rhode's sensory marketing successfully leveraged "food-inspired" visuals and product names



Interaction

Actions such as opening, breaking, applying, or revealing

Through a new app called **Coke SoundZ**, users can create their own melodies based on the sounds of **cracking open** and taking a sip from a bottle of Coke. "From the sound of the fizz to the clink of the ice, every noise triggers a sense of anticipation that releases dopamine in our brains."



Rituals

Repeatable ways of using a product that feel intentional and personal.

The new Dream collection of **Rituals** features 13 products with innovative formulas infused with unique ingredients, combining **AI-generated visuals with CGI** and real-life photography for a captivating look.

What makes a product a win for GenZ

Experience over function (2/2)

These elements increase memorability, emotional attachment, and shareability across categories.



Why this matters for travel retail ?



Travel environments heighten attention to **small, memorable moments**



Products that invite interaction **increase dwell time and engagement**



Experiential products justify **premium pricing** more easily than claim-led ones

Why scarcity works on Gen Z

Scarcity triggers urgency and social proof, not just fear. But only when it feels earned and transparent.

Scarcity signals desirability

Limited access increases perceived status trust

Artificial scarcity damages trust

- ✓ **Clear reason for scarcity**
Examples: "Travel retail exclusive"; "Available only on Asia-Europe routes"; "Seasonal Lunar New Year edition"
- ✓ **Access-based framing**
Examples: "First access for travellers"; "Only available while you travel"
- ✓ **Visible limits, not pressure**
Examples: "Available until end of summer"; "Batch 1 of 3"

**Do's
& Don'ts**

FLASH SALE

Vague urgency cues ✕

Examples: "Only a few left!", "Selling fast!", "Last chance!"

No explanation of limitation ✕

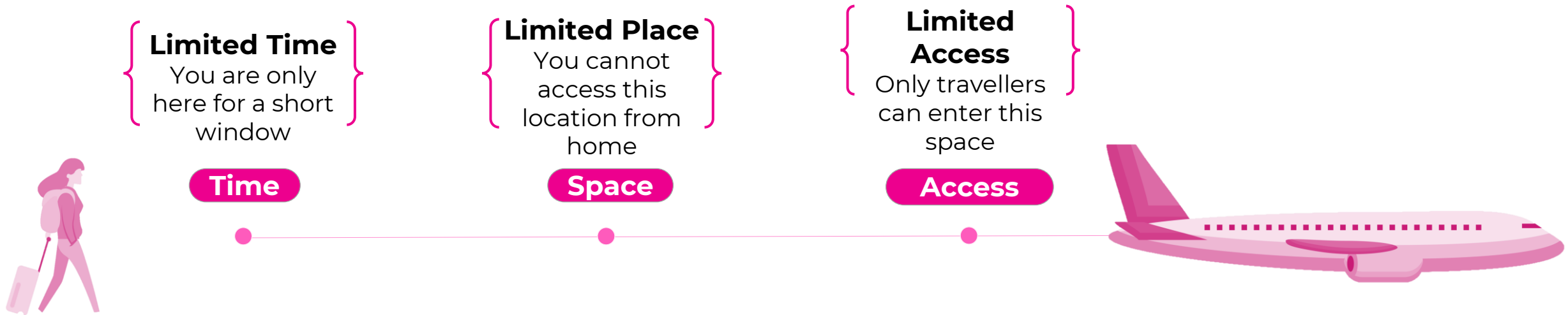
Example: Same product always available, No difference across channels

Pressure-driven design ✕

Example: Countdown timers, Red flashing alerts

Travel retail's natural scarcity advantage

Travel retail already offers the most credible form of scarcity. Time, place, and access are naturally limited — no need to manufacture urgency.



The forms of scarcity that resonate

Access beats “low stock”: for **Gen Z** scarcity is about who is allowed in, not how fast it sells out.



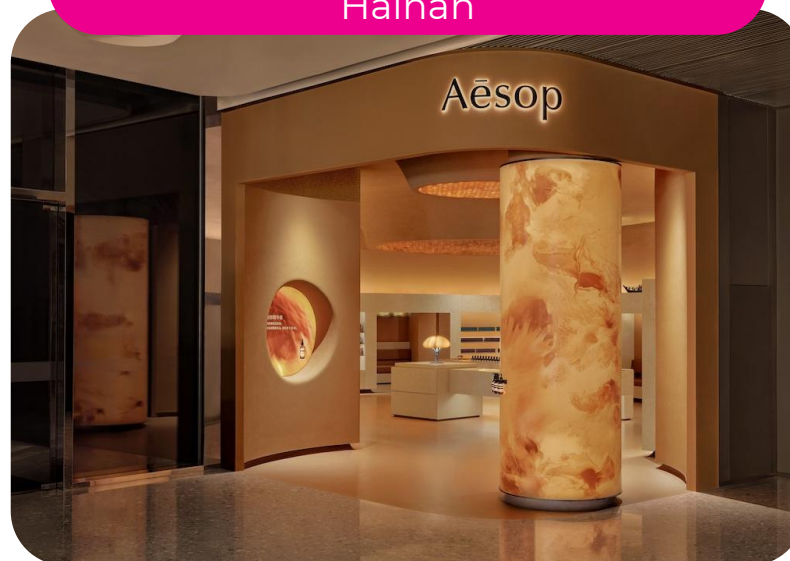
Gen Z & indulgence: experience over claims

For **Gen Z**, indulgence is about experience, not excess. Texture and interaction matter more than taste promises.

Helena Rubinstein's First Class Recovery, focused on luxury skin care and rituals



Aesop's sensorial boutique in cdf Hainan



Alcohol tasting in Auckland Airport



Sensory contrast (crunch, melt, pull)

Clear interaction moments

Emotional satisfaction, not volume



Why it matters?

Texture becomes a **premium signal** that is easy to understand and share.

42% of Gen Zs prefer brand **content that is fun and entertaining.**

75% of the Gen Z audience want brands to do **something new and unique.**

The airport is a stage, not dead time

For **Gen Z**, the airport is part of the travel experience. Waiting time becomes exploration and self-reward time.

This creates openness to discovery and impulse.



A **transition space** between daily life and experience



A moment of **reduced time pressure**



An environment where **browsing** feels **justified**, not wasteful



Why it matters for travel retail ?



Dwell time is an opportunity for experience-led engagement



Products that invite interaction outperform static shelves



“Quick stories” work better than detailed explanations



Key Learnings

01

The opportunity is bigger than it looks

Only **19% of travellers in North America** visit both **Retail and F&B** during the same airport journey.

Yet these travellers – who spend nearly two hours airside, feel no time pressure, and rank shopping, relaxing and exploring F&B as their top three airport activities – are a **highly convertible audience**.

For around half of **dual visitors**, having **sufficient time** is the main driver of visits, followed by an **exploratory mindset**.

Layout is the lever



Airport layout and **proximity** are **primary drivers of dual visitation** – and the **primary barrier** when absent.

87% of travellers who currently visit only Retail say they would be more likely to also visit F&B if the two areas were **better connected or more visible**.

Many travellers **stay close to the gate** or **follow the most direct route**, engaging only with what appears in their path.

Gen Z shows the **strongest preference for mixed layouts (56%)**, making **integrated commercial design** a strategic priority not just for today but for the **next decade of air travel**.

03

In retail, environment does the selling



Impulse visits are triggered by the desire to treat oneself, exclusivity and attractive product displays. Overall, **experience matters even more than assortment**.

Shoppers seek **exclusivity, value** and a **wide assortment**. They express **strong satisfaction** with **luxury range**, exclusives and **brand variety** – while flag affordable entry-level options and sustainable products as areas where airports can improve.

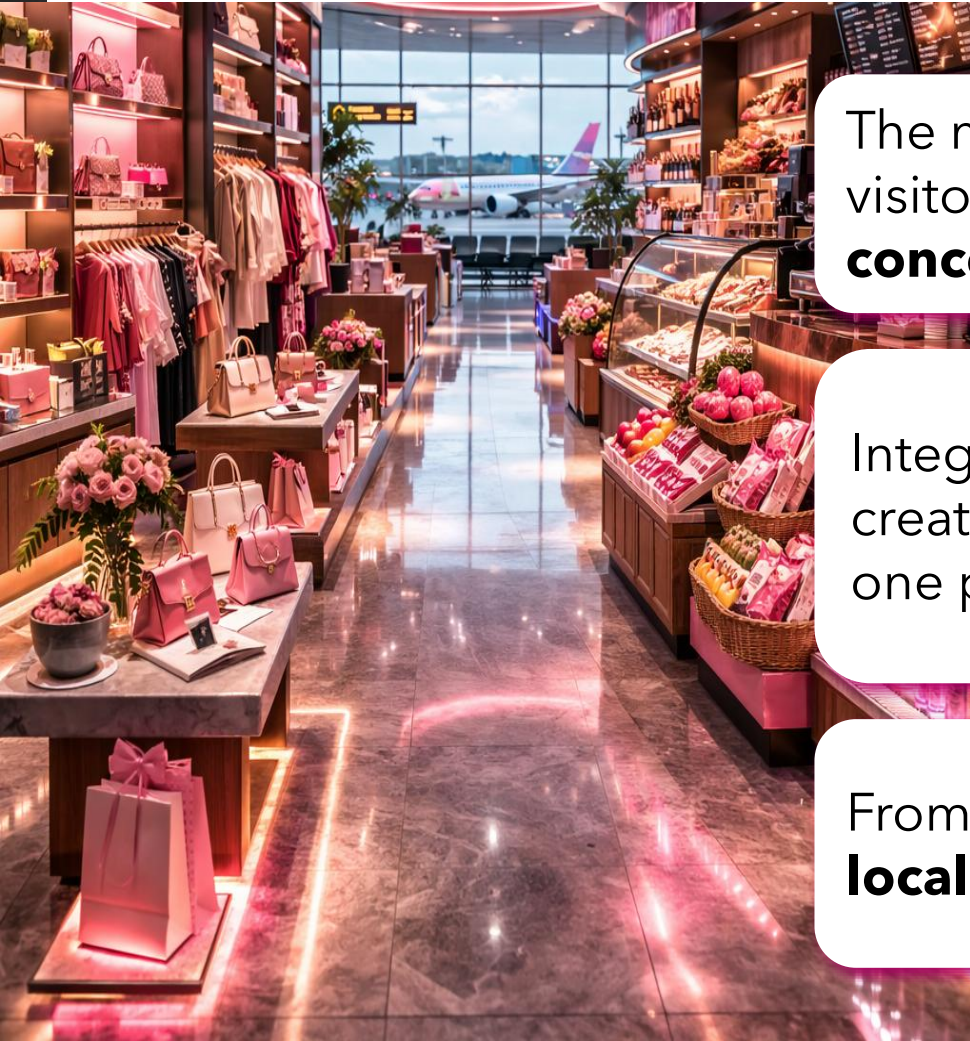
Premium yet convenient F&B is emerging as the new standard



North American travellers seek a **balance between premium experience and convenience**, favoring high-quality yet quick dining options that complement their shopping journey.

While travellers are **generally satisfied with food quality, variety and cleanliness, value for money and originality / exclusivity** remain the main areas of **lower satisfaction**.

Hybrid concepts are the bridge



The most direct path to converting single visitors into dual visitors is **not a layout change alone** - it is an **experience concept change**.

Integrating **F&B into the retail environment** (and vice-versa) creates a **seamless reason to engage with both categories** in one place.

From all concepts tested, those linking **chocolate, fashion** or **local products with F&B** rank highest in appeal.

Gen Z drives seamless F&B and retail integration



The most effective way to **engage** Gen Z is not through standalone retail or F&B - it is through **seamless, experience-led integration** of both.

Gen Z is **time-rich** and **experience-driven**, naturally moving between F&B and retail. Creating a **natural journey** from **consumption to discovery**, where concepts combining F&B with retail drive the highest appeal and **unlock dual spending**.

From all behaviours observed, concepts that **enable discovery, validation** and **sharing** - especially through experiential, local, authenticity or culturally relevant elements - rank highest in engagement.



Thank you!

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