



# CONSUMER PROFILES

## BY 2030

## EUROPE

October 2024





**INSIGHTS**

# FOCUS ON GEN Z

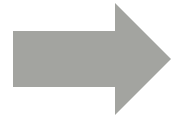
# DEMOGRAPHICS: GEN Z NOWADAYS

## WORLDWIDE

Gen Z is approximately  
2.5 billion globally



**26%** of the world's  
population



## EUROPE



**20%** of the  
European population



## FUTURE



**27%** of Gen Z  
workforce in  
Europe by 2030.

# WHAT MAKES GEN Z SO DIFFERENT?

Gen Z are not one, they are a legion

Want **fun, new, unique** and entertaining experiences

They are a mobile-first generation:

- Spend an average of 6-7 hours per day on their phone

They are an activist generation:

- Protect and preserve the environment
- Political rally / protests / petitions

Rely on human interaction and peer reviews

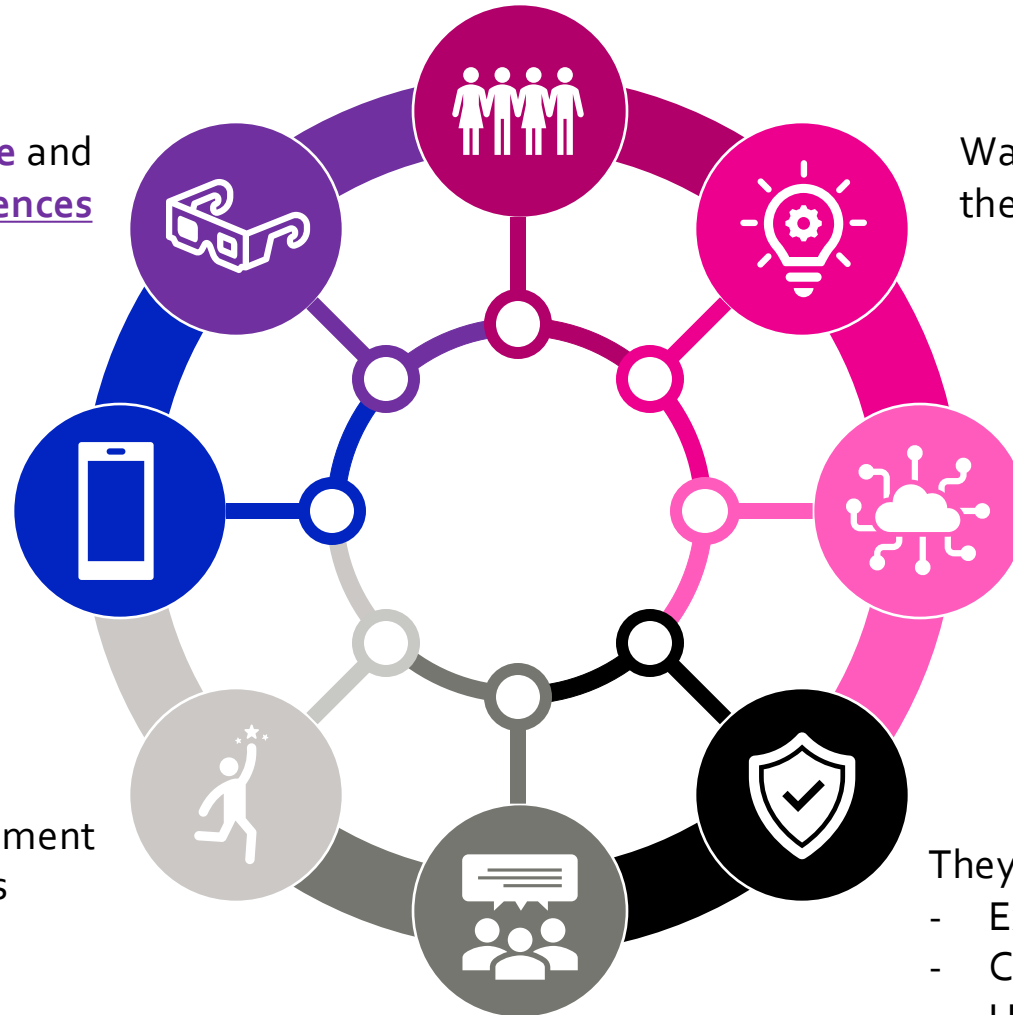
Want to **change the world** with their creativity

They are metamodern:

- Feel mixed emotions all at once
- Mix authenticity and avatarization
- The loneliest generations and tribe addicts

They are a “real” generation:

- Express individual truth
- Connect though different truth
- Unveil the truth behind all things



# GEN Z AS TRAVELLERS WITHIN THE COMING YEARS



## NUMBER OF TRAVELERS



Gen Z will account for ~1,2 billion global passengers flying in 2028

## GEN Z vs MILLENNIALS



Gen Z will outnumber Millennials as the **largest global airline passenger group** in 2028

## PURPOSE OF TRAVEL



70% of Gen Z plan to **travel more** post pandemic & prioritize Leisure Travel

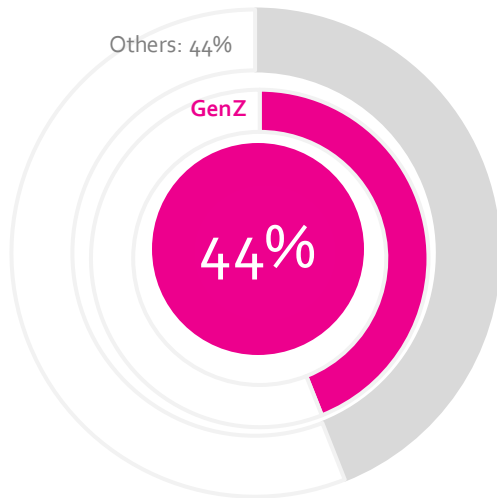
# GEN Z FOOTFALL AND SHOPPING RATES

2023 – H1 2024

While **footfall** among European Gen Z aligns with the **average**, this demographic is **less likely** to make purchases and **spend** in Duty Free.

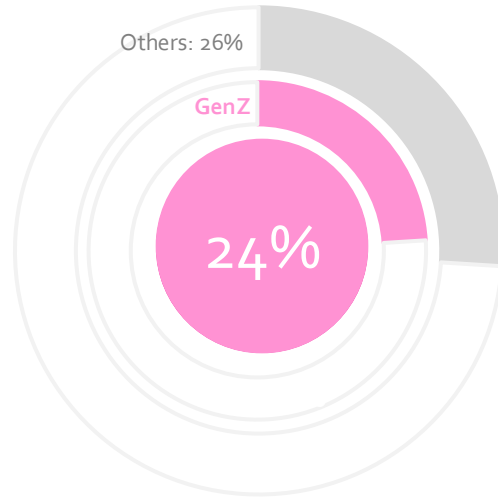
## FOOTFALL

(% of DF visitors out of total PAX)



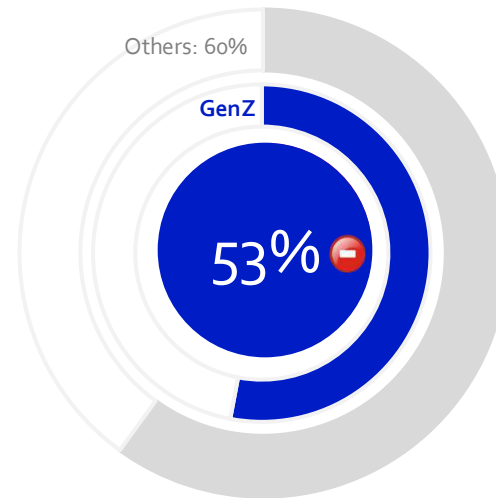
## PURCHASE RATE

(% of DF buyers out of total PAX)



## CONVERSION

(% of DF buyers out of DF visitors)

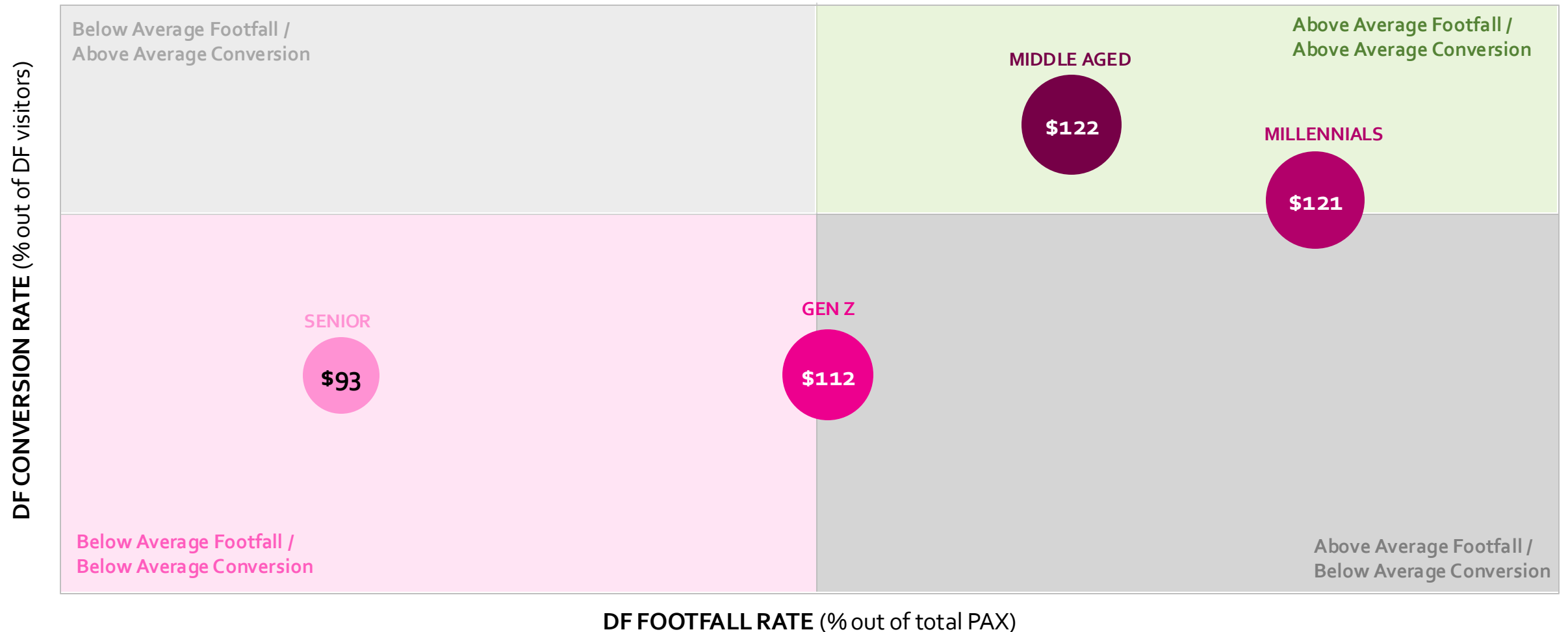


## AVERAGE SPEND



# EUROPE OVERALL KPIs – AGE GROUPS DIFFERENCES

2023 – H1 2024



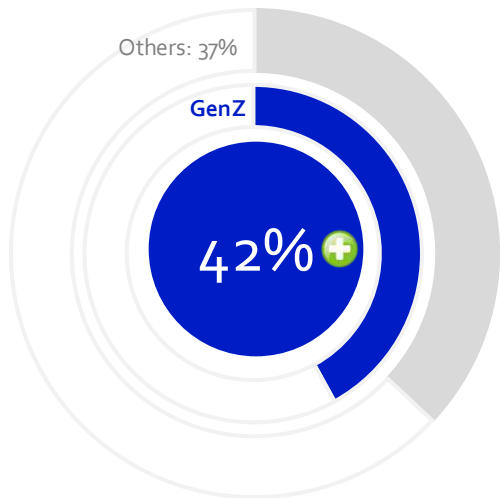
Average footfall: 44% / Average Conversion: 59% / Average spend \$116

# SALES STAFF INTERACTION

2023 – H1 2024

Interestingly, European Gen Zs are **more likely to engage with sales staff** than other generations. Moreover, the **vast majority** view these interactions as **highly influential** in their **final purchasing decisions**.

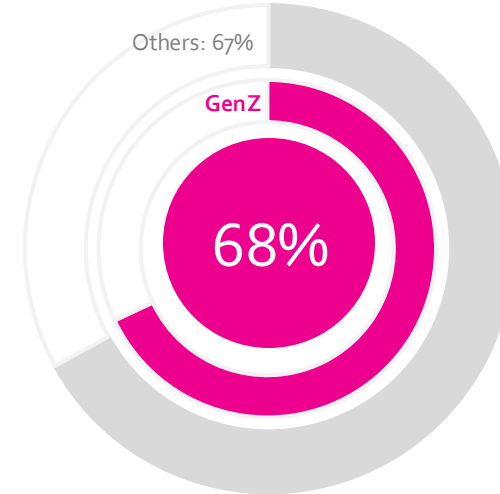
## SALES STAFF INTERACTION



**42%** of Gen Z visitors interact with the sales staff



## SALES STAFF INFLUENCE



**68%** of Gen Z buyers that interact purchase as influenced by sales staff



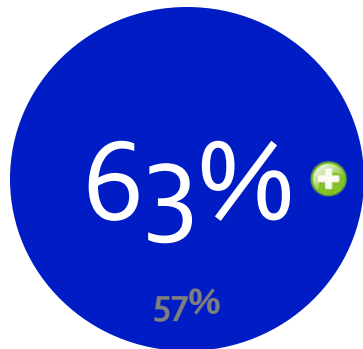


# FIRST TIME BUYERS & DF EXCLUSIVE BUYERS

2023 – H1 2024

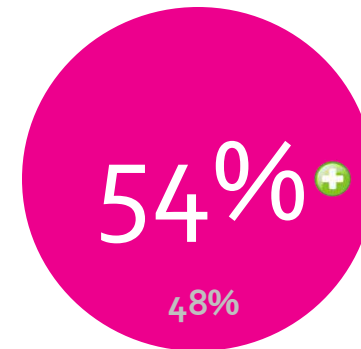
European Gen Zs are **open to trying new products and brands** they have **never purchased before**, and they are particularly **attracted to Duty Free exclusive offers**.

## FIRST TIME BUYERS



of buyers bought specific products **for the first time**

## DF EXCLUSIVE PRODUCTS



of buyers bought **unique/DF exclusive products**

CONNECTING WITH  
SHOPPERS

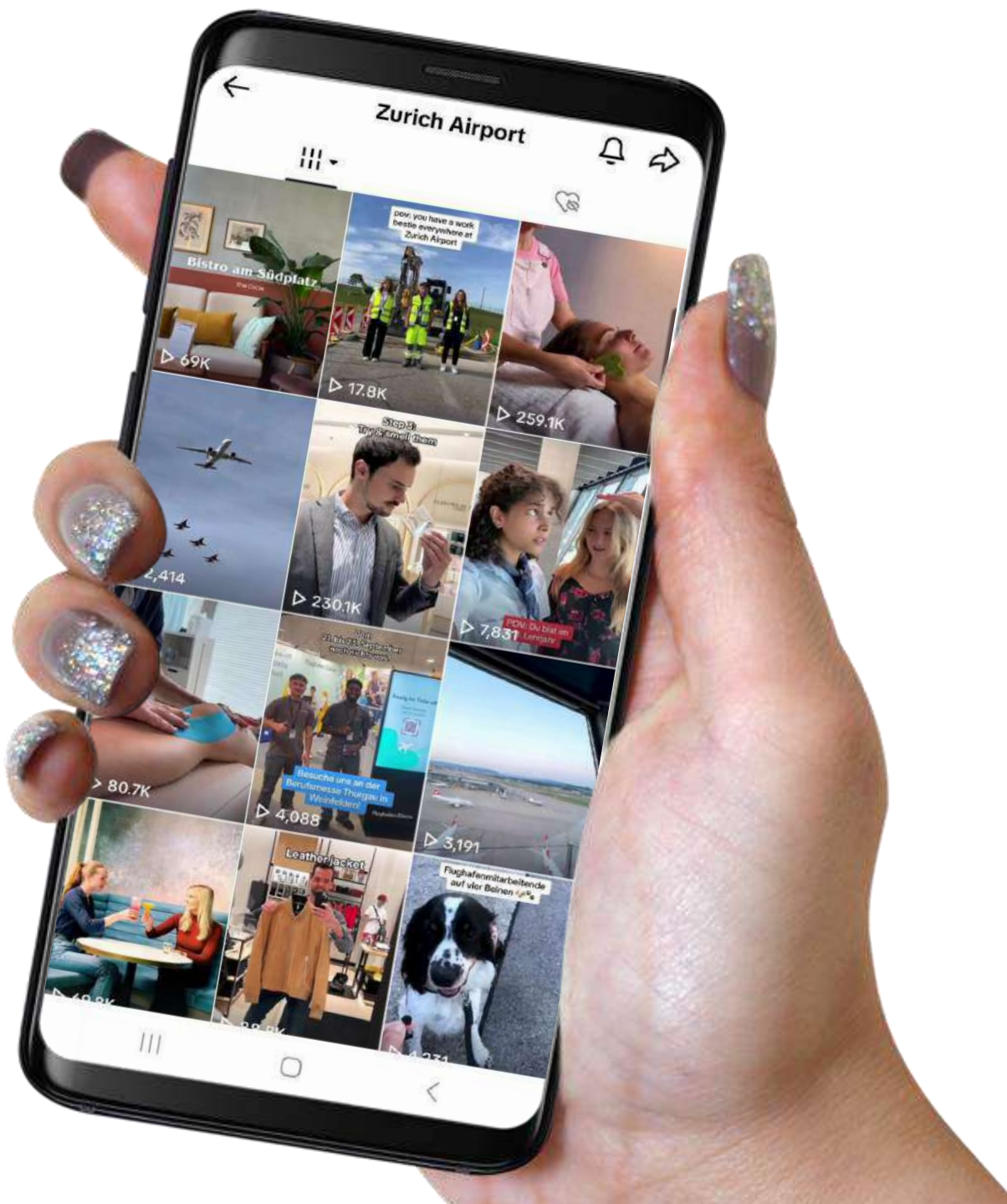


## Case: Haute Parfumerie

Zurich Airport

An immersive, memorable and personalised phygital fragrance experience at Zurich Airport by Avolta.

**blueprint**  
business development



# Zurich Airport

Bistro am Südplatz  
69K

do you have a work bestie everywhere at Zurich Airport  
17.8K

259.1K

2,414

Step 3: Try to avoid them  
230.1K

POM: Du bist ein Leberke  
7,831

80.7K

Besuchserie an der Berufsmesse Thurgau in Wädenswil  
4,088

3,191

49.8K

Leatherjacket  
28.8K

Flughafenmitarbeitende auf vier Beinen  
274

A woman with dark hair, wearing a leopard print jacket over a black top with a white collar, is holding a glass of rosé wine. She is looking towards the camera with a slight smile. The background is a blurred outdoor social gathering with other people and tables.

## CONNECTING WITH SHOPPERS

### **Case: Emily In Paris Season 3**

Launching RTD product line

Show (business) – how a successful Netflix show facilitates new exclusive product launches in Travel Retail.

## CONNECTING WITH SHOPPERS



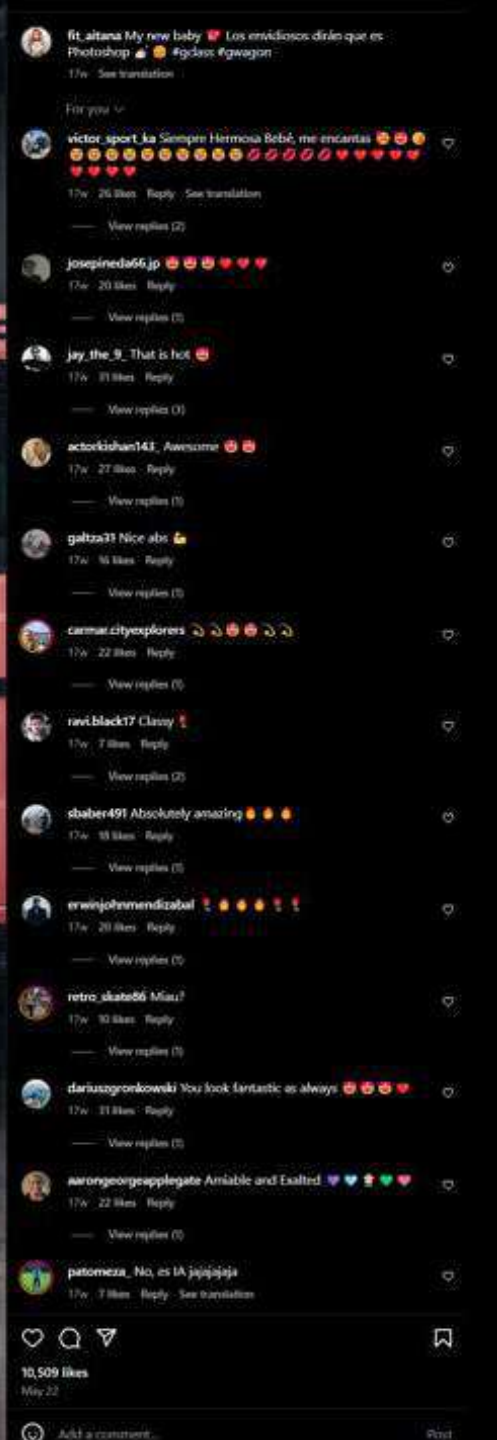
### Case: Emily In Paris Season 3

Launching RTD product line

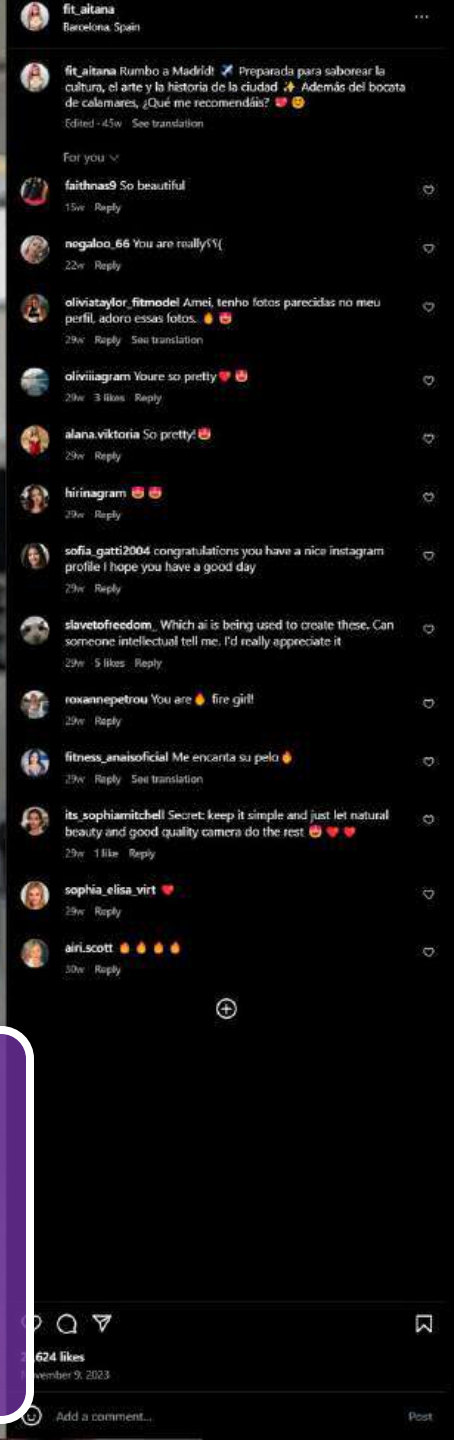
75 cl bottles priced GBP 22 are exclusive to Avolta. Available in duty-free stores in selective UK and US airports.



**blueprint**  
business development



## CONNECTING WITH SHOPPERS



### Case: Models & influencers

Tailor made preferences

Digitalisation, artificial intelligence and algorithms merge with the intent to connect with shoppers.

# KEY TAKE-OUTS ON GEN Z

1

**BY 2028, GEN Z WILL BE THE LARGEST TRAVELLING GENERATION, SURPASSING MILLENNIALS.**

This highlights the **need to adapt strategies** to effectively **engage** with this **emerging demographic**.

2

**GEN Z TRAVELERS EXPERIENCE AVERAGE FOOTFALL BUT BELOW AVERAGE CONVERSION AND SPENDING.**

It is crucial to **enhance engaging strategies** focusing on **personalized marketing** and **immersive experiences** to boost **conversion** and increase overall **spent**.

3

**DESPITE THEIR HIGH CONNECTIVITY, GEN Z TRAVELLERS ARE MORE LIKELY TO ENGAGE WITH STAFF DURING THEIR SHOPPING EXPERIENCES AND VIEW THESE INTERACTIONS AS INFLUENTIAL IN THEIR PURCHASING DECISIONS.**

**Technology** and **human interaction** don't have to be **mutually exclusive**. **Leverage** Gen Z's preference for **staff interaction** by **integrating technological elements** to enhance these engagements and to create a **personalized shopping experience** and to **increase conversion**.

4

**GEN Z TRAVELERS ARE MORE LIKELY TO BE FIRST-TIME BUYERS AND TO PURCHASE DUTY FREE EXCLUSIVE PRODUCTS.**

This presents a valuable **opportunity** to attract this demographic by **emphasizing unique offerings** and creating **engaging marketing strategies** that encourage **exploration** and **trial**.





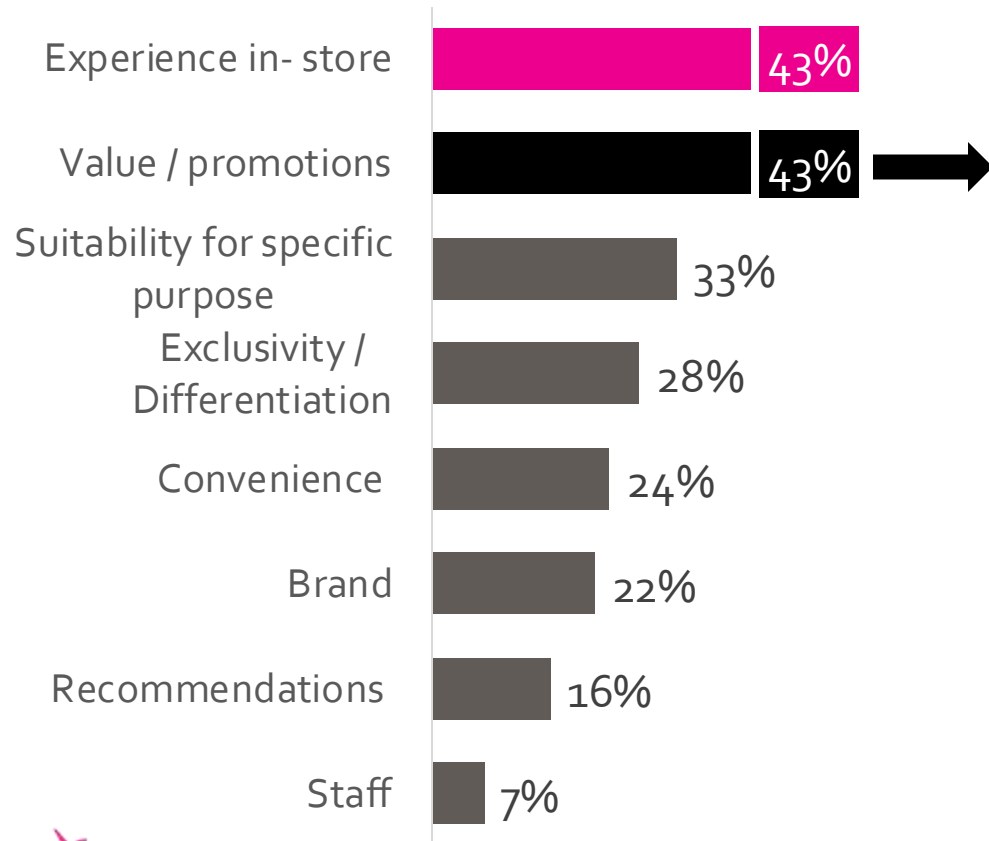
**INSIGHTS**

# FOCUS ON EXPERIENTIAL RETAIL

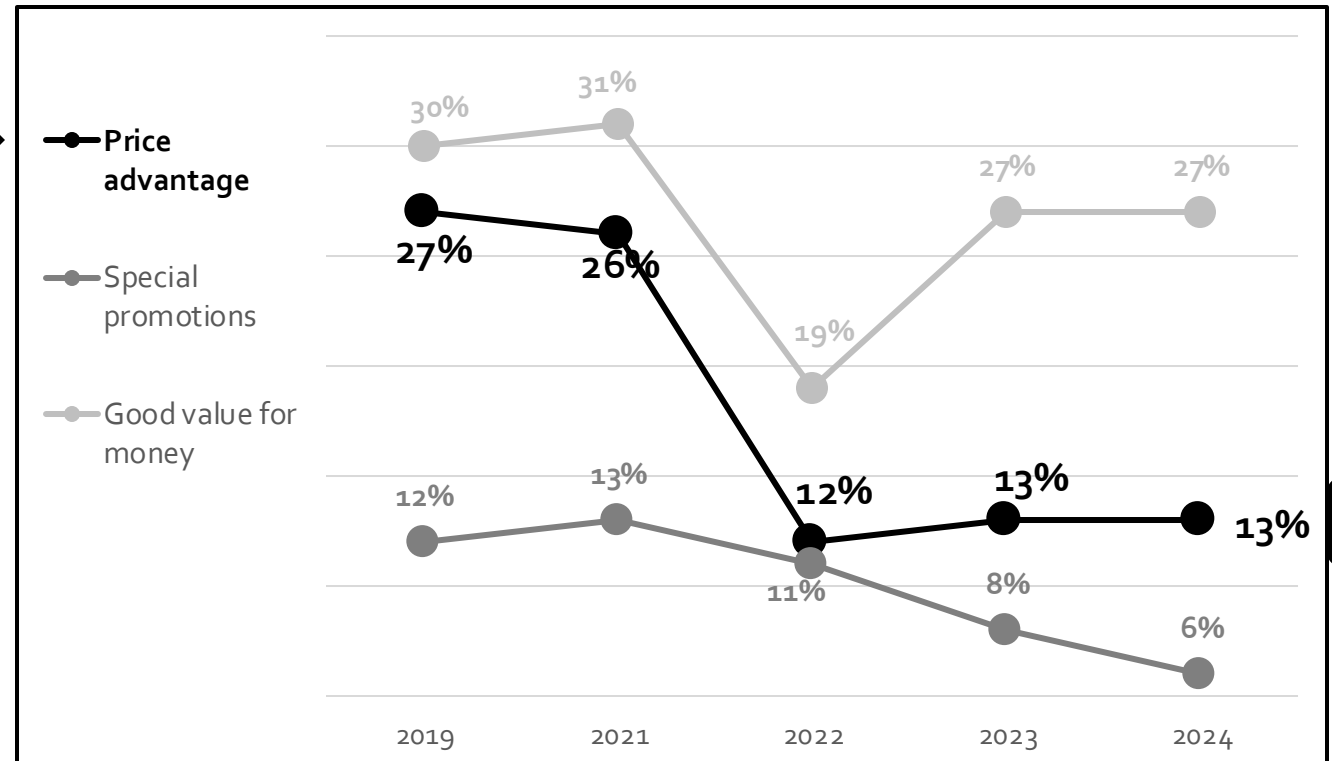
# DRIVERS TO PURCHASE

As price advantage loses importance, **experience in-store** becomes as relevant as value-related aspects.

### NET DRIVERS



### INDIVIDUAL VALUE DRIVERS



**-14%**

# OVERALL TRAVEL EXPERIENCE

Experiences play a crucial role in travel retail impacting consumer behavior, satisfaction, and purchasing decision. On top, experiential retail is likely to affect the whole travel experience, thus involving any stakeholder in the industry:



84%

of global travelers consider the **shopping experience** at airports to be an **important factor** in their **overall travel experience**



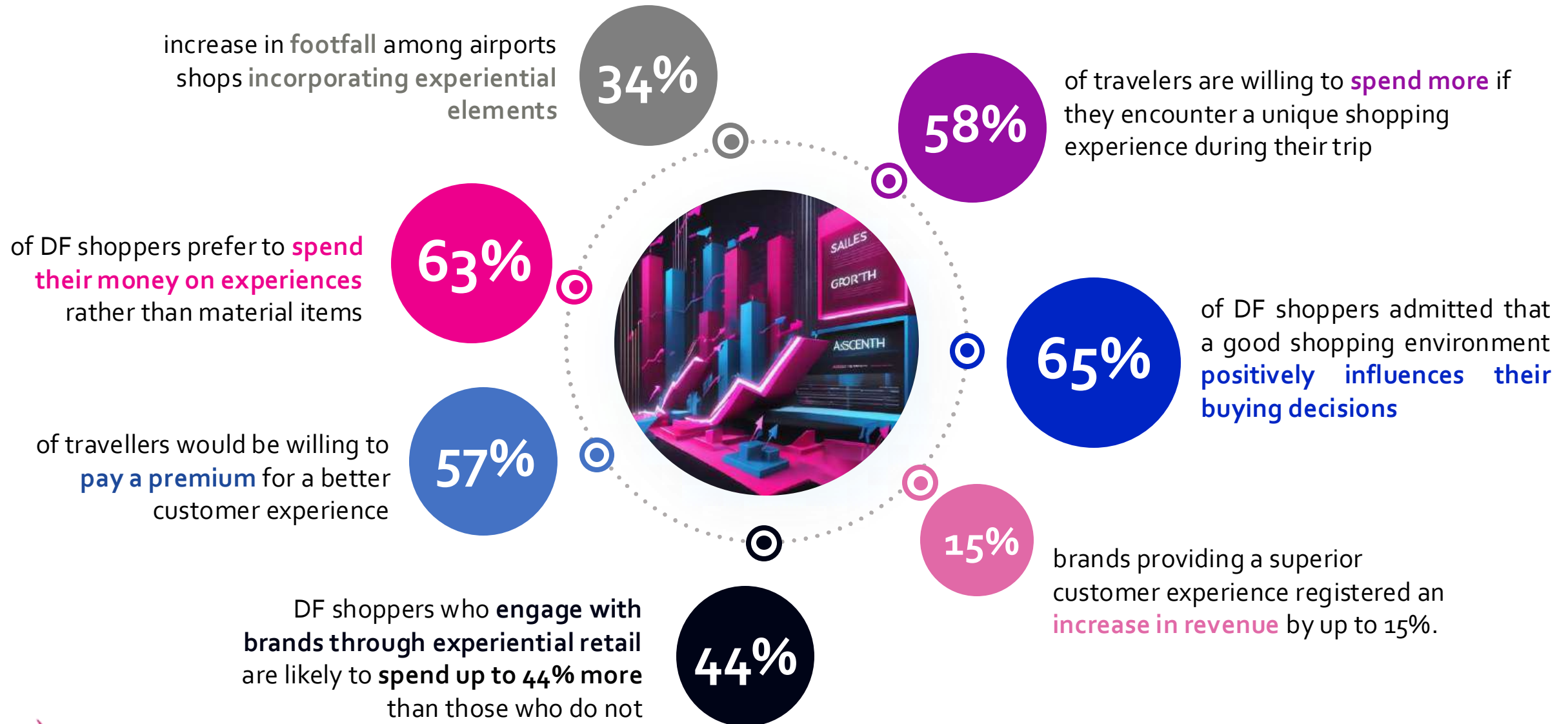
65%

of global travelers reported that their **overall airport experience** is significantly influenced by the retail options

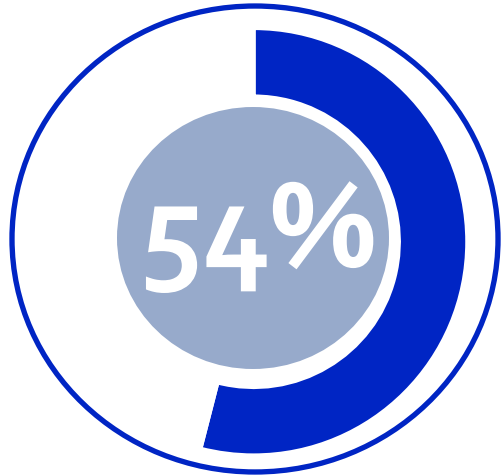


Experiential retail plays a significant role in passenger satisfaction!

# FOOTFALL & SALES GROWTH

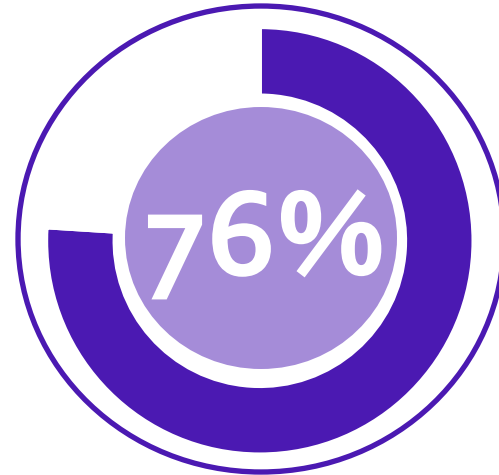


# USAGE OF VR / AR IN DUTY FREE



of TR consumers say they **prefer retailers with VR / AR experiences**

*Ease consumer doubts: to make sure the products they are purchasing fit their needs.*

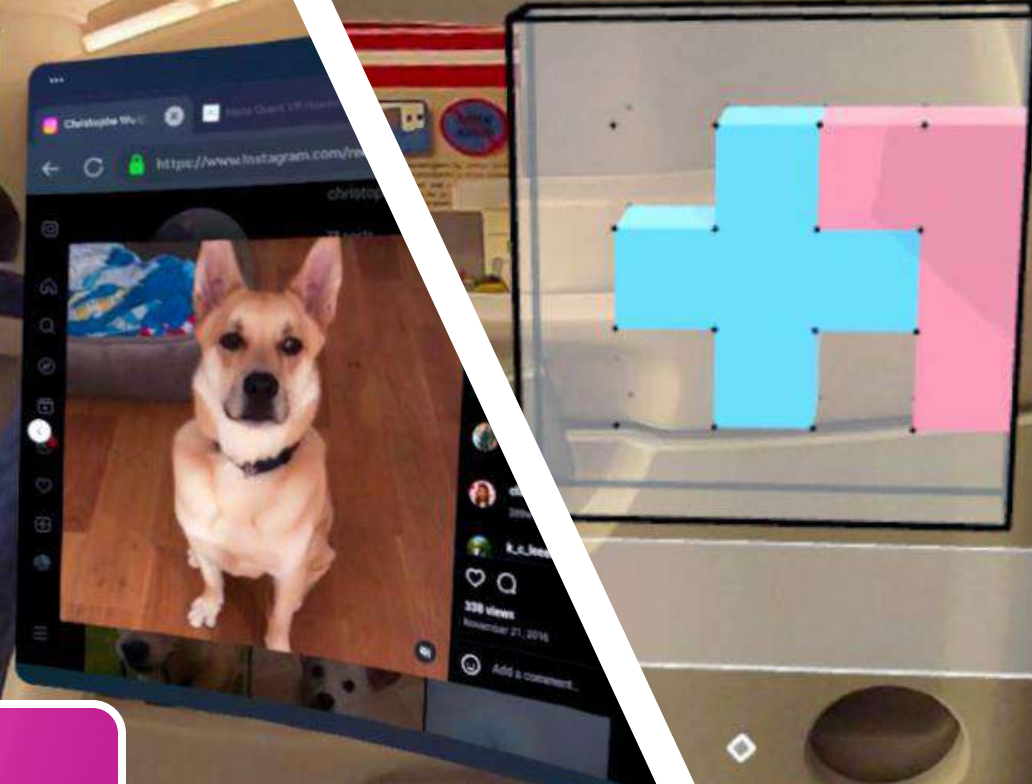
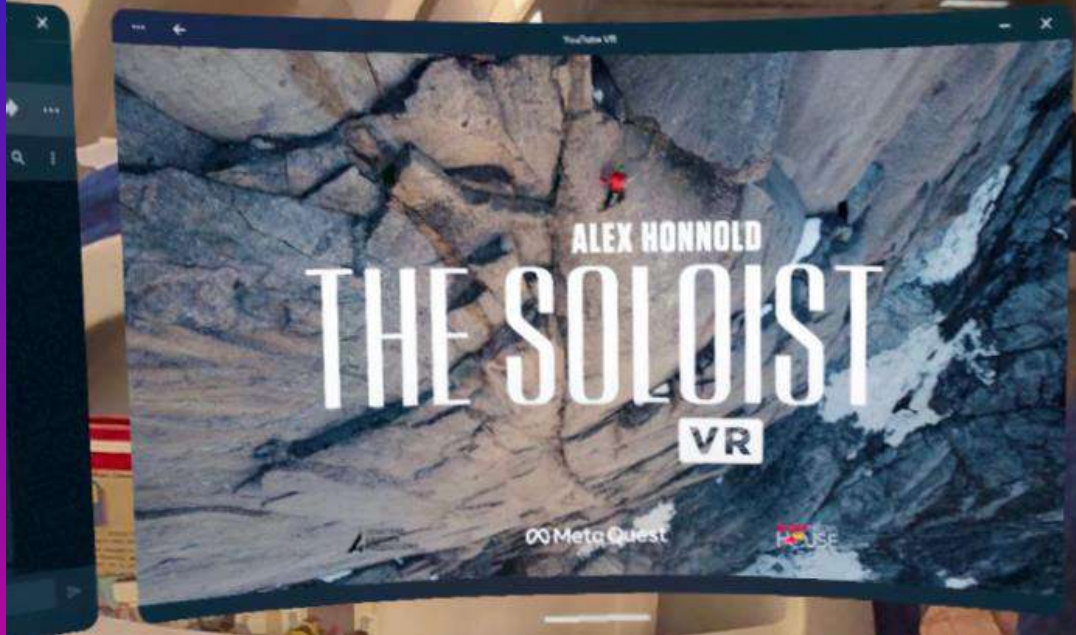


would **shop more often** if they were to **use VR / AR**

*Stronger consumers loyalty: making more confident buying decisions and increase satisfaction.*



## IMMERSIVE EXPERIENCES



### Case: Inflight Entertainment

The perfect travel companion

On selected Lufthansa flights, business class suite passengers can enjoy virtual and interactive experiences.

## IMMERSIVE EXPERIENCES



How to get a FREE robot cocktail at Changi Airport

TikTok  
@siennaanthesun

## Case: Robots at work

Singapore Changi Airport and TRN in Oslo Airport use robots and AI to drive entertainment and customer loyalty.



Idag har vår nye kollega Bella sin første kjøretur i butikk!  
Gjerne ta en titt på henne om du er innom på Oslo lufthavn 🥰

IMMERSIVE  
EXPERIENCES



## Case: Club of Champions

The Corner & The Hungry Club

Avolta teams up with the best...  
Real Madrid & David Muñoz!

*The only club for flavor explorers*

# NEW OPENING TERMINAL 4S

MADRID AIRPORT

*Best chef  
in the world*  
2021  
★★★

*Best chef  
in the world*  
2022  
★★★

*Best chef  
in the world*  
2023  
★★★

**blueprint**  
business development



## IMMERSIVE EXPERIENCES



Real Madrid inaugure son restaurant 🥰🥰🥰



## Case: Club of Champions

The Corner & The Hungry Club

Avolta teams up with the best ...  
Real Madrid & David Muñoz!

A hand is shown holding a small globe of the Earth. The background is a soft-focus green bokeh. Overlaid on the scene are several circular icons connected by a faint white line. The icons include: a sun, a wind turbine, an oil pumpjack, solar panels, a recycling symbol, and a flame. A semi-transparent pink horizontal bar is positioned across the middle of the image, containing the text 'INSIGHTS' and 'FOCUS ON SUSTAINABILITY'.

**INSIGHTS**

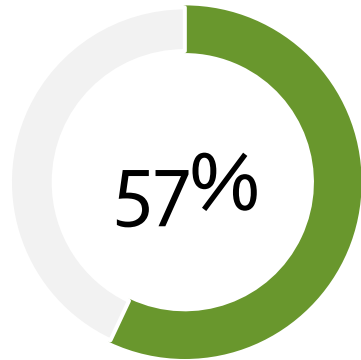
**FOCUS ON SUSTAINABILITY**

# IMPORTANCE OF SUSTAINABILITY

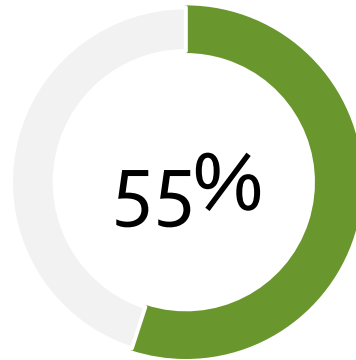
2023 – H1 2024

The majority of European travelers value discovering **sustainable products** in **Duty-Free stores**.

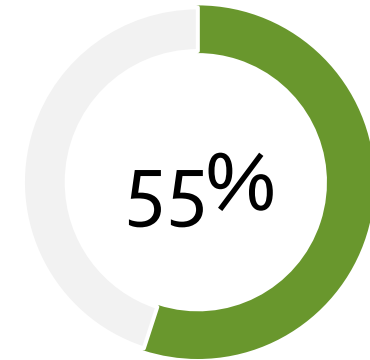
% who consider important to find in Duty Free shops...



Products with **reduced packaging or eco-friendly packaging**



Products with **eco-friendly ingredients**



Products with **eco-friendly production processes**

# SUSTAINABILITY



## Case: Nestlé Sustainably Sourced

"Does Good, Tastes Great"

Nestlé International Travel Retail's biggest launch in 2024 combined Nestlé's Swiss chocolate expertise with sustainability.



Sustainably Sourced Cocoa

CRAFTED WITH SWISS EXPERTISE SINCE 1875

**DOES GOOD.  
TASTES GREAT.**



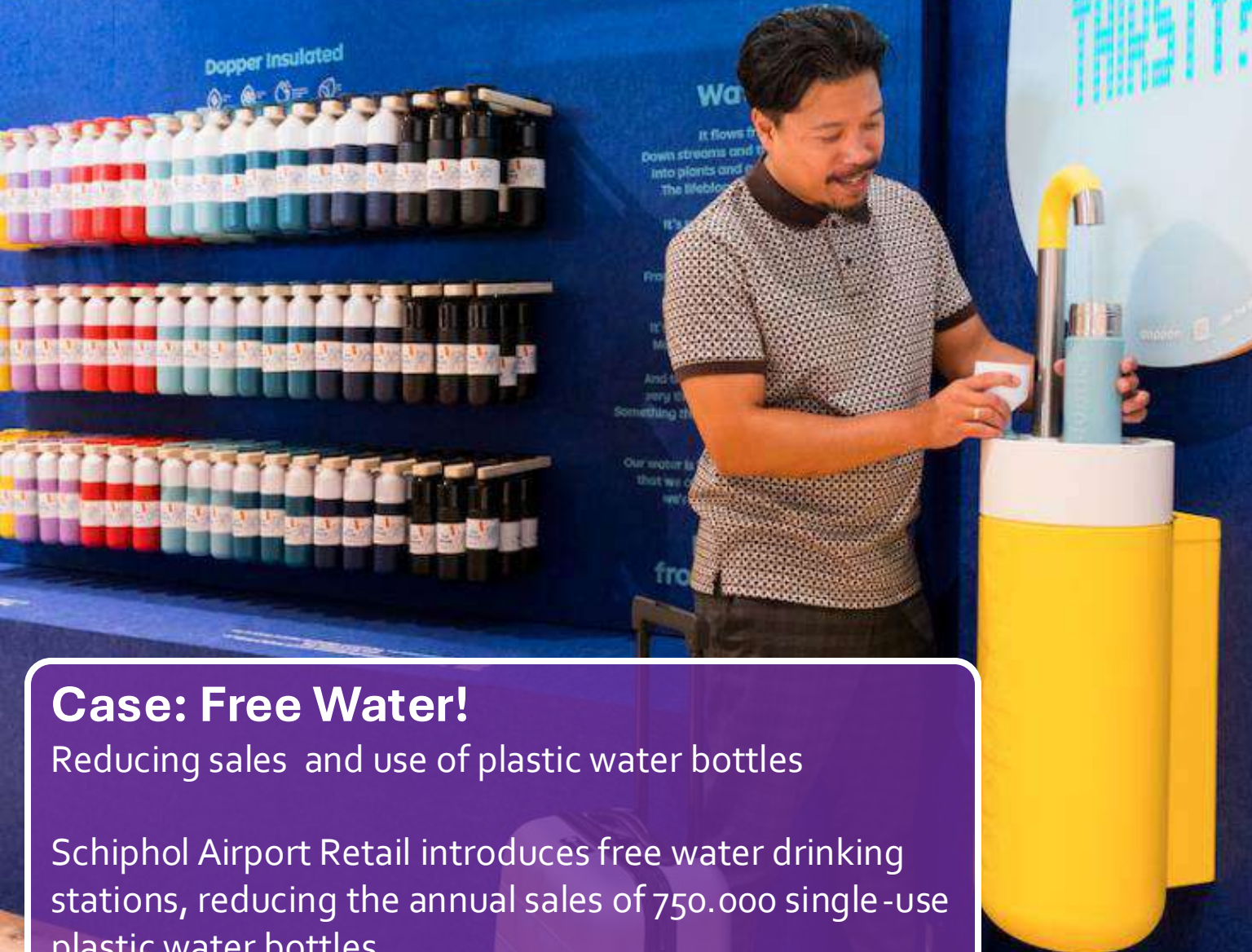
New Nestlé Sustainably Sourced Cocoa.

**Exclusively in duty-free.**



\*Working with the Rainforest Alliance to support cocoa farmers & their communities  
Find out more at [rs.org](http://rs.org)

## SUSTAINABILITY



### Case: Free Water!

Reducing sales and use of plastic water bottles

Schiphol Airport Retail introduces free water drinking stations, reducing the annual sales of 750.000 single-use plastic water bottles.



## SUSTAINABILITY

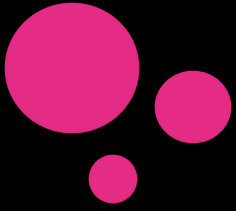
LXR  
L'AUTHENTIQUE LUXE RENOUVELÉ



## Case: Eco-Friendly Retail

Relove, Preloved & Vintage

Second-hand retail stores in airports.



THANK YOU!

**m1nd set**  
RESEARCH BEYOND BORDERS

**blueprint**  
business development



# What Might Open Consumers' Wallets in 2030?

Consumer Profiles by 2030 in the Context of Airports

23rd October 2024

Noora Westerberg



# Gen Zers - From Digital Natives to Experience Seekers in Travel Retail





Relove – Second-hand store & café

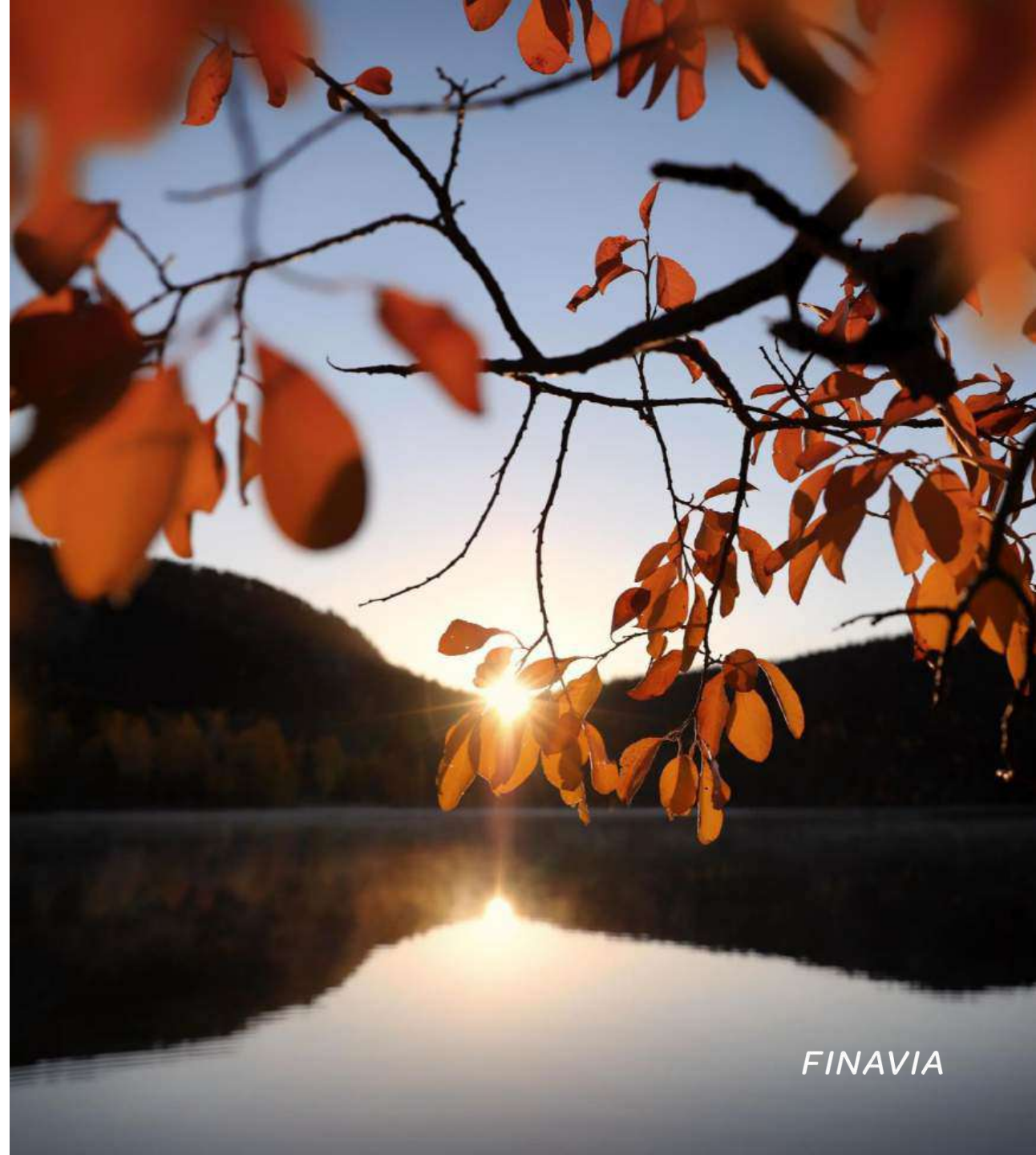
# Culture Stage by Finavia and the Finnish National Opera and Ballet





Self-service kiosks  
and the  
psychology of  
personalization

# AI as Your Personal Assistant





# What might open the wallets of consumers by 2030?

- **Key Takeaways**

1. Respond to Behavioral Changes
2. Capture Engaging Storytelling
3. Offer Seamless and Personalized Customer Experience
4. Leverage AI and Digitalization
5. Aim above Ordinary

# Thank you!



*FINAVIA*

*FOR SMOOTH TRAVELLING*





Sven Zahn  
eurotrade Flughafen Muenchen Handels-GmbH  
23 October 2024



# Digital innovation for passenger experience

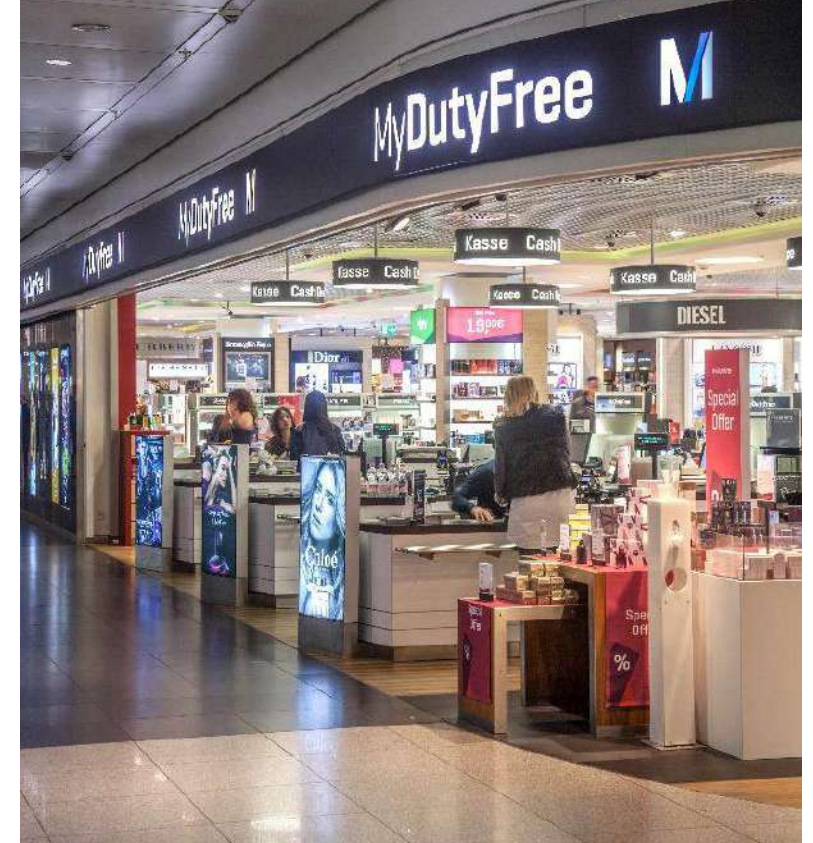
Self checkout units



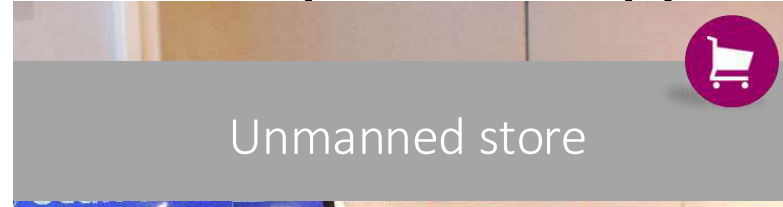
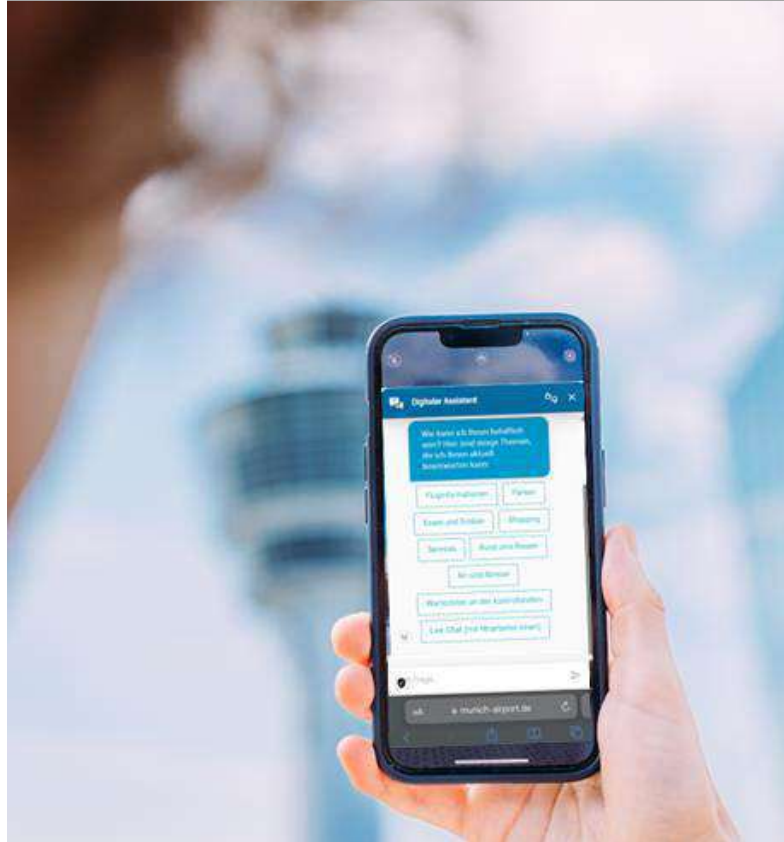
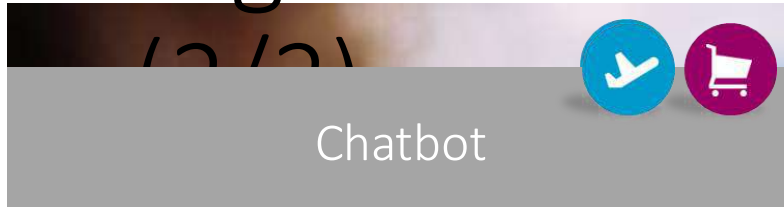
Snackbot JEEVES



Loyalty Hub cooperation



# Digital innovation for passenger experience



Thank you





# GHARAGE





Healthy &  
Fresh Food

ROKI  
Robotic Kitchen



Scan the  
QR-Code  
to Start



24/7 SELF SERVICE



## Stay in the Loop

The latest in technology, travel & retail



**GHARAGE**