

m1nd-set releases second part of landmark 10-year analysis of global duty free shopper behavior: value and promotions ease as service, brands, store environment gain traction

m1nd-set has published the second instalment of its ten-year retrospective analysis of the global duty free shopper.

Following the release of Part 1 of the landmark study, which examined footfall, conversion, purchase purpose and the growing appeal of exclusives, this new research focuses on what happens once passengers reach the shop floor, reports the research agency. Based on a decade of shopper insights from m1nd-set's Business Intelligence Service (BIS) between 2016 and the first half of 2026, it tracks the shifting weight of value, in-store experience, brand, exclusives, promotions, price comparison, digital marketing and the influence of sales staff.

The research reveals that the relative importance of pure value has declined markedly. In 2016, 74% of global travel retail shoppers identified value as a purchase driver; this fell to 50% in H1 2026, the research reveals. In-store experience, a purchase driver for 62% of global shoppers in 2016, experienced a decline around the global pandemic period, before recovering to 54% in 2026. The availability of premium brands as a purchase driver rose from 22% to 30% over the same period.

Promotional purchasing has also eased, according to m1nd-set. Initially recorded at 54% in 2016, promotional purchasing increased to 68% in 2022 during the post-pandemic recovery. However,

the share of shoppers buying on promotion has since declined to 47% in the first half of 2026. Price comparison on the other hand has increased over the last ten years, climbing from 60% in 2016 to 65% in 2026 after sharp swings during and after the pandemic years.

Awareness of digital and in-terminal marketing touchpoints followed a turbulent path, falling to 14% in 2020 before rising sharply and then settling at 31% in the first half of 2026. Staff interaction rates remain close to their 2016 level of 57%, stabilizing at 56% in H1 2026. The influence of those engagements, however, has strengthened. Three-quarters of shoppers who interacted with

sales staff in 2026 said the staff had positively impacted their final purchase decision, up from 63% a decade earlier, the research reveals.

Commenting on the findings, Dr Peter Mohn, CEO & Owner at m1nd-set, said: "Ten years ago value was by far the main reason people bought in duty free. Today it still matters, but it is no longer as important. Shoppers are influenced by a much wider set of factors, such as the quality of the store environment, the strength of the brands on offer, the ability to check prices, and the advice of sales staff. Stakeholders must no longer treat value as the only lever."

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Falic Group donates \$200,000 to Panama earthquake relief efforts

Duty Free Americas parent company Falic Group has announced a \$200,000 donation to support humanitarian relief efforts for communities affected by the October 9th earthquake in Panama.

The announcement was made in the presence of Panama City Mayor Mayer Mizrahi, Leon Falic, President of Falic Group, and Dov and Miro Falic, Vice Presidents of Falic Group.

Falic Group's \$200,000 donation will support earthquake relief efforts across Panama. Of this, \$100,000 will go towards Mayor Mizrahi's "Chantín pa' la gente" initiative, in partnership with the Omar Alfano Foundation, to build

and equip temporary homes for families affected by the earthquake. A further \$75,000 will contribute to broader relief efforts for communities affected by the earthquake across Panama, while \$25,000 will support the community of Colón, home to Falic Group's distribution centers.

"Panama is our home, and we are proud to stand alongside its people during this difficult time. For 25 years, we have built our business here, raised our families and developed deep roots in the country. We feel a strong responsibility to support the communities that have welcomed us and helped us grow. We hope this contribution will provide meaningful assistance to those

affected by the earthquake as Panama begins to recover," said Leon Falic, President of Falic Group.

Panama is Falic Group's global headquarters and has been home to the company for 25 years. With more than 2,000 employees in the country, Falic Group has deep roots in Panama and remains committed to its people, communities, and future.

In addition to operating Duty Free Americas, Falic Group is a luxury-brand brand builder with a diverse portfolio of global businesses, including Bloomberg Línea, Global Wine & Spirits and Reebok LATAM.



m1nd-set *continued*

“The gaps that characterized shopper behavior in 2016 have closed considerably,” Mohn continued. “Whichever world region a traveler is from, their expectations on the shop floor are now much more consistent. This means that marketing, merchandising and staff training can no longer assume large regional differences in the weight given to value, experience or brand. The same core elements matter across the board, even if local nuances remain.”

Regional differences narrow

Regional differences in both interaction and influence have likewise narrowed, leaving only modest variations between markets. Staff interaction rates were consistently higher among travelers from Asia Pacific and the Middle East & Africa in the years leading up to the pandemic. Shoppers from the Americas generally interacted less often, apart from a brief peak during the recovery period. European travelers tended to engage the least frequently. By the first half of 2026 these regional differences had narrowed considerably, with interaction rates converging in the low-mid-fifties across all regions. m1nd-set says staff influence over

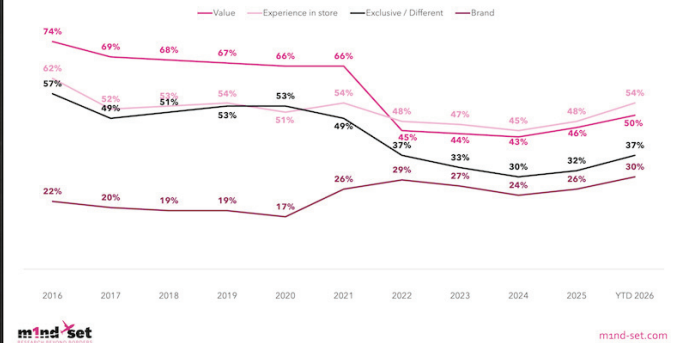
the past decade has been quite consistent across all world regions apart from minor variations. Regional differences have since narrowed, however, and the impact of staff interactions has now converged to around 75% across all regions.

“A helpful, well-informed assistant still makes a measurable difference,” says Mohn. “Even as price comparison becomes commonplace and digital messaging reaches more travelers, engagement with sales staff is more effective than it was a decade ago. Investing in staff knowledge and relevance is not a soft option; the insights show that sales teams directly impact conversion.”

According to m1nd-set, the insights imply that global shoppers are influenced by several factors rather than one or two dominant ones, and that their behavior is more uniform across regions than at any point in the past ten years.

“The challenge for the industry” Mohn added, “is to ensure that shoppers understand the value of the duty free offer, they discover an in-store experience that is truly engaging, and they find brands they recognize and trust. It’s equally

Drivers of Purchase

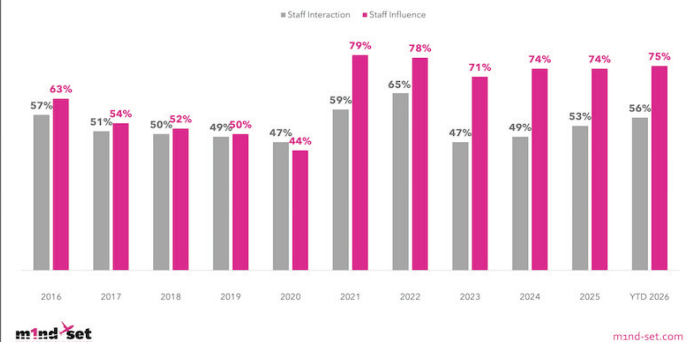


important that digital touch points are visible to travelers before and during their journey, and that staff are able to guide shoppers in their purchase decision. Stakeholders also need to reassess how they segment their consumer groups,” Mohn continued. “Shopper behavior previously differed quite broadly across world regions but is now much more aligned

in several key areas. Marketing, store layout and training programs need to reflect this reality while still allowing for differences between individual shoppers and markets.”

Companies interested in acquiring either the full research or regional, generational or other segment specific data, can contact m1nd-set at info@m1nd-set.com.

Sales Staff Interaction and Influence



Bijoux Turner reinforces Travel Retail ambitions under new CEO Nadia Stamboul

Miami-based accessories brand Bijoux Turner is entering a new chapter with the appointment of Nadia Stamboul as Chief Executive Officer of Bijoux America.

With nearly two decades of commercial leadership experience across travel retail, luxury, beauty and consumer goods, the company says that Stamboul joins the company with a clear initial priority: strengthen the foundations of the business, reinvigorate its travel retail presence and create a platform for sustainable future growth.

For Bijoux Turner, travel retail represents both an important part of its heritage and a natural starting point for its next chapter.

“Bijoux has a unique history in travel retail, and I see tremendous potential to build upon that foundation,” said Stamboul. “Our immediate focus is on strengthening the fundamentals - our partnerships, product proposition and commercial execution - while ensuring that we remain relevant to today’s traveler and today’s retail environment.”

This vision is only the

beginning of a broader vision for the company, she continues.

“The opportunities ahead of us extend well beyond any single channel. Once we have a strong foundation in place, there is significant potential to evolve the brand, explore new categories, markets and partnerships, and ultimately reach consumers in new ways.”

Stamboul’s approach will emphasize disciplined growth rather than expansion for expansion’s sake - developing the right product, with the right partners, in the right markets,

while preserving the accessibility and value that have historically distinguished Bijoux Turner.

“Travel retail is evolving, and so is the consumer. We have an opportunity to take what has always made Bijoux distinctive, modernize it and build something much bigger from it.”

“We have a strong heritage to build from, but we are looking forward. Travel retail is an important part of that journey - and the opportunities from there are endless.”

The Macallan launches GTR exclusive Carta Nautica 20 Years Old at Singapore Airport

The Macallan has partnered with Lotte Duty Free to unveil the world-first launch of The Macallan Carta Nautica 20 Years Old at Singapore Changi Airport, marking the debut of the new global travel retail exclusive. This release will be available exclusively at Changi Airport from September 28 to October 18, 2026, ahead of a wider rollout at select airports globally from October 19, 2026.

The company revealed the new launch at the TFWA World Exhibition in Cannes this month.

The 20 Years Old expression forms part of The Macallan Carta Nautica Collection. Derived from the Spanish term for ‘nautical chart’, Carta Nautica traces the voyage of The Macallan’s oak staves and casks across the Atlantic Ocean, from North America to Jerez de la Frontera and Scotland, before arriving at The Macallan Estate. Crafted by The Macallan’s Whisky Mastery Team, the collection is defined by an anomalous maturation journey. The whiskies are initially matured in sherry seasoned oak casks from Jerez de la Frontera, before being transferred into casks that previously held bourbon from North America.

The Macallan Carta Nautica 20 Years Old, bottled at 42% ABV, features orange peel and

vanilla that are joined on the nose by tropical notes of charred pineapple and juicy mango, alongside softer hints of apricot conserve.

The whisky’s packaging is also complemented by artwork from American artist Amy Genser, whose distinctive paper-based work draws inspiration from the movement of water and the organic forms found in nature, extending the collection’s oceanic story beyond the label.

The Macallan Carta Nautica Distilled in 1987 will also be showcased alongside the 20 Years Old expression. Bottled at 45.2% ABV, this single malt Scotch whisky was distilled in 1987 and matured over 38 years. The first in a new series of vintage releases is presented in a sculpted wooden case with flowing contours and Amy Genser’s ocean inspired artwork, echoing the movement and rhythms of the Atlantic that underpin the Carta Nautica collection.

To mark the world-first launch of The Macallan Carta Nautica 20 Years Old, The Macallan, Lotte Duty Free Singapore, and Changi Airport Group have unveiled two dedicated pop-ups at Singapore Changi Airport.

Kasper Andersen, Edrington Regional Managing Director



Edrington launched the GTR exclusive The Macallan Carta Nautica exclusively at Changi Airport in Singapore.

Western Europe & Global Travel Retail, commented: “Global travel retail is built on discovery and journeys, making it a natural home for The Macallan Carta Nautica 20 Years Old. Bringing together craftsmanship, imagination and exploration, The Carta Nautica Collection expresses the extraordinary journey behind the whisky and the mastery that shapes it. Together with Lotte Duty Free and Changi Airport Group, we’ve created a captivating activation that brings to life the epic transatlantic journey of The Macallan oak casks and immerses travelers into the depths of The Macallan Carta Nautica Collection.”

The Macallan Carta Nautica Collection comprises four expressions, each shaped by the transatlantic journey of The Macallan’s oak and its distinctive maturation across sherry seasoned oak and casks that previously held bourbon. Crafted by The Macallan Whisky Mastery Team, the collection includes a rare vintage release alongside expressions created for global travel retail and selected markets.

The four expressions are:

The Macallan Carta Nautica Distilled in 1987; The Macallan Carta Nautica 20 Years Old, created exclusively for global travel retail; The Macallan Carta Nautica, available in Latin America and Mexico; and The Macallan Carta Nautica 105 Proof, available in the USA.



The Macallan Carta Nautica Collection features four expressions including The Macallan Carta Nautica Distilled in 1987.

Maker's Mark launches GTR exclusive World Wood Collection

Maker's Mark Kentucky bourbon has unveiled the World Wood Collection, a new Global Travel Retail-exclusive series celebrating the influence of exceptional oak from around the world.

The inaugural release, Expedition 01, is the first Maker's Mark whisky to feature three oak finishes across three continents: Japanese Mizunara, French and American white oak staves. It makes its debut this month in partnership with Avolta exclusively in five selected airports worldwide, ahead of its wider GTR roll-out next year.

The limited-edition expression will first be available in New York (JFK), London (LHR), Istanbul (SAW), Perth (PER), and Bengaluru (BLR) with a suggested retail price of \$85.

The launch marks another key step in Maker's Mark's strategy to expand and elevate its presence in the high-potential ultra-premium whisky segment and builds on the success of the new Maker's Mark Artist Series – City Edition introduced exclusively for GTR



earlier this year.

“Expedition 01 represents the kind of premium, story-driven whisky experience that resonates with today’s global travelers,” said Vanessa Widmann, Managing Director, Global Travel Retail at Suntory Global Spirits. “With its exclusive availability in Global Travel Retail, distinctive oak-forward story and premium presentation, it offers travelers a rare opportunity to discover a truly unique expression from Maker’s Mark — one that celebrates craftsmanship, exploration and the influence of exceptional oak.”

Expedition 01 brings together

Japanese Mizunara, French and American white oak, with each whisky individually finished before being blended into a single expression. The result is a complex, balanced whisky in which every oak contributes its own distinctive character.

- Japanese Mizunara oak contributes delicate floral notes and subtle umami complexity.
- American white oak delivers sweet vanilla notes, brightness and a rounded character.
- French oak introduces warm baking spice, caramel richness and an elegant, lingering finish.

The World Wood Collection represents the evolution of Maker’s Mark’s wood finishing philosophy, first introduced with Maker’s Mark 46, which demonstrated how oak staves could unlock new dimensions of flavor in bourbon while remaining true to the brand’s handmade heritage. Maker’s Mark has long treated oak as a key ingredient, and has invested in advancing both the art of wood finishing and the stewardship of American white oak at Star Hill Farm.

“At Maker’s Mark, we celebrate bourbon as an agricultural product and the universe of flavor that can be unlocked through nature—water, wheat, oak and time,” said Rob Samuels, Managing Director and eighth-generation whisky maker. “That belief has long guided our commitment to sustainable forestry and to protecting the future of American white oak. Through intentional wood finishing, The World Wood Collection explores exceptional oak from around the world to create a whisky that expands the boundaries of flavor while staying true to our craft.”

Initially available exclusively through Avolta Global Travel Retail doors ahead of Holiday 2026, Expedition 01 is bottled at 1L and 47.5% ABV. It is presented in premium packaging inspired by the distinctive grain of each oak species. The launch will be supported by a dedicated in-store activation program designed to bring the Maker’s Mark’s premium innovation story to life for traveling consumers.

TOUS Perfumes and HALLOWEEN Perfumes launch across 23 points of sale at major airports in Mexico

Spanish fragrance company PyD reports a significant milestone in the duty free and travel retail channel with a major collaboration with Avolta in Mexico for its TOUS Perfumes and HALLOWEEN Perfumes.

Since June, both brands have been available across 23 retail locations at some of Mexico’s major airports, including both terminals at Mexico City International Airport, as well as Monterrey and Guadalajara airports, among other locations.

The rollout has a prominent

presence at Cancún International Airport, where the brands are showcased through two custom displays. These spaces have been designed to strengthen the brand’s visual identity, encourage travelers to discover their fragrance universes and deliver a distinctive brand experience at the point of sale.

“Our collaboration with Avolta in Mexico represents a major milestone for PyD and an important step forward in our travel retail strategy. Our focus is to continue building the presence

of both brands through meaningful activations that bring each brand’s storytelling closer to travelers, enhancing their experience at the point of sale. We are confident that this partnership will be the start of a new phase of growth and new opportunities in the region,” says Esther Jiménez, Americas Director at PyD.

Looking ahead, PyD will continue to pursue sustained geographic growth while strengthening brand awareness and performance across its existing retail network.



Absolut Vodka partners with KAWS for latest Artist Edition

Absolut Vodka has unveiled an Artist Edition collaboration with world-leading contemporary artist KAWS, reimagining its iconic apothecary-shaped bottle through KAWS' unmistakable visual language.

Inspired by a specially commissioned painting by Brooklyn-based artist KAWS, the ABSOLUT KAWS Artist Edition bottle features the artist's famed "XX" motif and CHUM character on the front, and an image of the original painting on the back.

KAWS— whose real name is Brian Donnelly — is a natural collaborator for Absolut Vodka. His work bridges the gap between fine art and popular culture, resonating with audiences far beyond the traditional art scene. Growing up in New Jersey, Donnelly spent his teenage years tagging trains and billboards downtown with his now-famous KAWS tag.

The ABSOLUT KAWS Artist Edition bottle (40% ABV) will be available for a limited time from October 1, 2026 across more than 30 markets, including the UK, Germany, Spain, Mexico, China, Italy, New Zealand, Poland and

Korea.

Craig Van Niekerk, Absolut's VP of Marketing, says: "The best creative collaborations don't just put two names on a label; they create an immediate visual disruption that stops you in your tracks. That's exactly what we've created with KAWS. By bringing his signature 'XX' motif and CHUM character to our bottle, KAWS has taken a canvas with a rich artistic heritage and given it a witty, unexpected twist. We believe art shouldn't be confined to galleries and this visual disruption brings a piece of joyful, accessible pop culture right into people's hands."

Rae Gibson, Director, Power Brands and Emerging Categories, at Pernod Ricard GTR, comments: "KAWS enjoys such broad cultural appeal, which is one of the reasons why global travel retail is the perfect platform for this new Artist Edition. We know travelers from all corners of the world will gravitate towards it as both the Absolut brand and KAWS' playful and accessible work transcends boundaries."

KAWS says: "I am excited to join the lineage of great



artists that have worked with Absolut Vodka over the decades. Many artists I admire have been commissioned by the brand to create artwork for their iconic ads, and I'm grateful for the opportunity to add my work over the Absolut bottle itself, too. My goal is to allow art to meet people in unexpected places and I hope my bottles will be enjoyed at gatherings around the world."

Absolut has been collaborating with artists such as Andy Warhol for more than forty years ago. In addition to its artist collaborations (more than

550 artists have contributed over 850 artworks inspired by the distinctive Absolut Vodka bottle since the 1980s), Absolut has also more recently partnered with household brands and popular cultural events, including Heinz, Tabasco and Tomorrowland.

The ABSOLUT KAWS Artist Edition hits global travel retail from October 2026, in a 1L format with availability in selected retailers across the Americas, Europe, the Middle East and Africa, and Asia-Pacific for one year only.

New F&B options in U.S. airports

JFKIAT, HMSHost open Eataly at JFK T4

John F. Kennedy International Airport Terminal 4 operator JFKIAT has announced the opening of Eataly — the globally recognized Italian restaurant and marketplace brand — enhancing T4's renowned dining program. The opening of Eataly at JFK T4 is part of JFKIAT's partnership with the HMSHost-led joint venture announced last year, to introduce a varied selection of local and diverse food & beverage businesses into T4.

As the largest Eataly airport location in North America, the

T4 location reflects the latest milestone in T4's ongoing transformation, as JFKIAT continues to reimagine the terminal's commercial program with a focus on creating a world-class passenger experience that reflects the cultural diversity, innovation, and energy of New York City. As part of the transformation, JFKIAT has woven elements of each NYC borough throughout T4, creating different zones that each represents a borough or region for passengers to authentically experience. Eataly, a New York City staple, sits in the terminal's Manhattan region and joins an

expanding lineup of acclaimed and local culinary offerings at T4, including Brooklyn Tea & Market, FIELDTRIP, Bessou, Chopt, Dos Toros, and Hunt & Fish Club.

Located next to the Delta Sky Club and gate B32, Eataly at T4 spans 6,935 square feet and features more than 200 seats, a restaurant, a wine bar, and a marketplace with grab & go options, offering passengers a variety of ways to experience authentic Italian cuisine before departure or upon arrival.

"The arrival of Eataly marks another exciting step forward in our continued efforts to enhance the culinary and passenger

experience at T4," said Roel Huinink, Chief Executive Officer of JFKIAT. "As we continue to shape the future of our terminal, we remain committed to introducing concepts that offer passengers meaningful opportunities to discover new flavors, cultures, and experiences. Eataly brings the traditions, quality, and hospitality of Italy to T4, adding another layer to the diverse and dynamic experience we strive to create for travelers from around the world."

SSP at Orlando International

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Maison Perrier-Jouët returns to Paris and Miami for second year with art meets nature pop-up and Limited Edition Belle Époque 2018 Cuvée

For the second consecutive year, Pernod Ricard Global Travel Retail and Maison Perrier-Jouët have staged activations in Paris-Charles de Gaulle and Miami International Airport with their prestige range of fine champagne.

Designed to recruit and drive conversion among high net worth individuals, the ‘House of Wonder’ experience was officially launched October 6 in Paris at Terminal 2E with retail partner Lagardère Travel Retail and runs until November 9, before transferring to Duty Free Americas, Miami Airport North Terminal, Gates D37-38, between November 30 – December 27 to coincide with the famous Design Miami art fair.

The activations, ‘where art meets nature,’ feature a new limited edition vintage cuvée – the Perrier-Jouët Belle Époque 2018, by Iris van Herpen.



For 2026, Maison Perrier-Jouët invited the Dutch artist and couturier, Iris van Herpen, to reinterpret the iconic anemone emblem using her own visual language, exploring its organic forms, textures and movement. The result is a trio of creations: a unique singular piece, ‘Symphonic Bloom’ is a sculptural silk and 22-carat gold plated dress adorning a jeroboam of ultra-prestige 1988 Perrier-Jouët Belle Époque cuvée. This unique piece will be on display at the Paris CDG pop-up for a limited time only.

She has also created a derivative of this 22-carat gold plated sculpture which wraps around a collectable magnum of the Belle Époque 2007 called Symphonic Life, of which only 10 units exist and will be offered on sale to Le Cercle members.

The third creation is the bottle and giftbox design for a limited edition of the Perrier-Jouët Belle Époque 2018. Inside the 75cl bottle is a specially curated cuvée imagined hand-in-hand with Cellar Master Séverine Frerson, which features a bespoke liqueur de dosage produced in collaboration with Iris van Herpen, and which will be available to travelers for the duration of each pop-up.

Renowned for her distinctive approach to fashion, for the



Pernod Ricard Global Travel Retail and Maison Perrier-Jouët staged an activation in Paris before it moves to Miami at the end of November.

commission Iris van Herpen immersed herself in the Maison’s vineyards, drawing inspiration by recording sound waves emitted by the species and micro-organisms found in the soils. From these graphic translations she created the artistic sculpture, the collectable and the design for the bottle and gift pack of the limited edition 2018 cuvée.

Available for purchase at either pop-up, the special artist-inspired Perrier-Jouët Belle Époque 2018 vintage is a blend of 50% Chardonnay, 45% Pinot Noir and 5% Meunier, sourced from the Maison’s historic Grand Cru vineyards in Cramant, Chouilly and Le Mesnil-sur-Oger.

In Miami any purchase of Perrier-Jouët Belle Époque will include a single ‘Be More Flower’ champagne flute.

Branded Perrier-Jouët gift bags will also be offered to support the premium gifting experience.

Andrew Bardsley, Brand Director, Prestige and Ultra-Prestige Spirits, Pernod Ricard Global Travel Retail comments, “Our expertise lies in creating stunning, immersive airport activation spaces and inviting in passengers with dwell time on their hands to make new discoveries. In the champagne category we use innovation and premiumisation such as this highly creative collaboration with Iris van Herpen to make memorable, celebratory moments that convert into sales and which serve to build brand equity in key locations where there is domestic synergy. And there can be no better place to dovetail with that than here in Paris.”

F&B *continued*

Airport

SSP America is opening three new restaurants that will bring global craft beer and a distinctly local flavor to Orlando International Airport’s (MCO) later this year: BrewDog, Jam-Eng and Zaza Cuban Café & Bar will enhance the airport’s North Terminal Complex with distinct dining experiences spanning

globally recognized Jamaican and British cuisine, and Cuban American comfort food.

BrewDog is known for its award-winning beers, scratch-made comfort food, and lively atmosphere.

Jam-Eng will introduce travelers to a vibrant combination of Jamaican and British culinary traditions. Its menu features

traveler-friendly favorites including jerk chicken, Jamaican patties, and classic British comfort food, offering a distinctive taste of Orlando’s multicultural character.

Zaza Cuban Café & Bar, already a favorite at MCO, features a contemporary take on Cuban American comfort food.

“With BrewDog, Jam-Eng and Zaza Cuban Café & Bar,

we’re bringing together global and local flavors in a way that reflects the spirit of Orlando. These are the kinds of experiences that travelers remember, and they’re exactly what we mean when we say our purpose is to be the best part of the journey,” said George Mboya, Chief Executive Officer of SSP America.