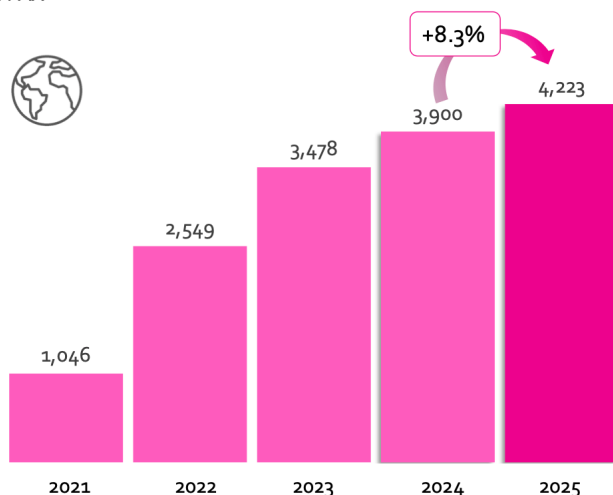


# m1nd-set reveals 2025 air traffic and shopper behavior forecast

## Air Traffic 2025 – Global Trend

International Departures + Arrivals ; Direct + Transfer  
In million PAX



**International air traffic** globally over the past four years and into 2025, has shown consistent growth since 2021.

The total number of global air passengers grew from just **1.05 billion** in 2021, when international travel was just emerging from the global pandemic to more than **double (+143%)** in 2022, when total passengers counted more than **2.5 billion**.

**Double digit growth** continued in 2023 and 2024, by 36% and 12% respectively, and projected growth for 2025 is a further **8.3%** growth when global passenger numbers are expected to attain **4.22 billion**, nearly quadrupling over the past five years.

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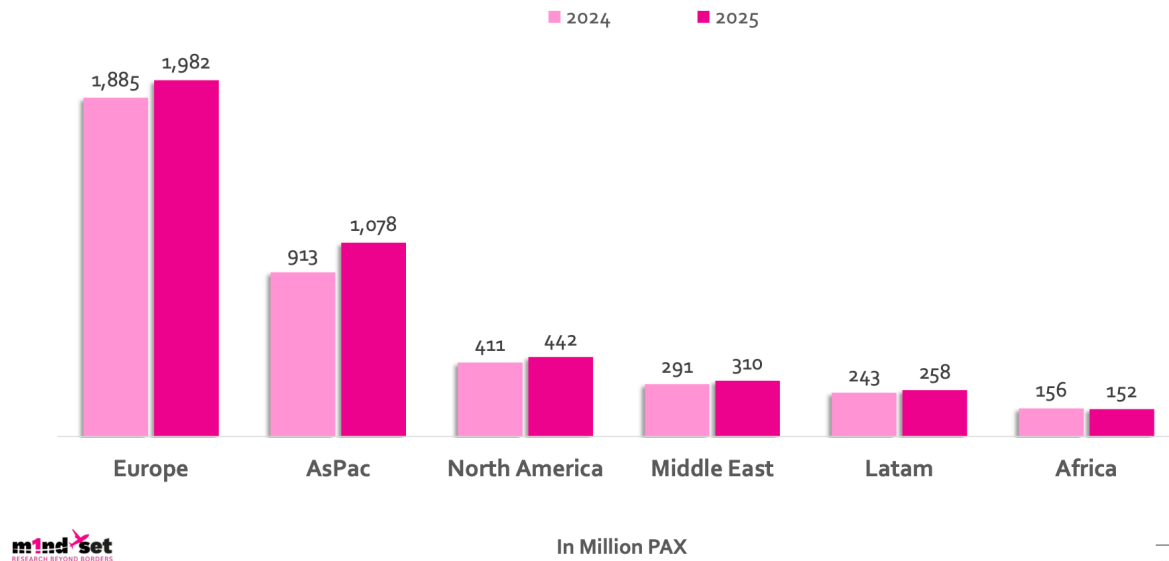
Leading travel retail research agency m1nd-set unveils its 2025 forecast report, offering a comprehensive outlook on global air traffic trends and evolving shopper behavior. The report provides strategic insights for travel retail stakeholders, covering top airports, nationalities, and key consumer trends that will shape the travel retail industry in the year ahead.

The two-part 2025 forecast provides an in-depth overview and comprehensive analysis of global and regional air traffic trends, with air traffic data provided through m1nd-set's partnership with IATA. The air traffic analysis identifies trends across global regions, the top 25 airports, and the 25 leading nationalities contributing to international traffic.

Drawing on interviews with over 250,000 global consumers across all world regions, the 2025 forecast report also underlines the key trends in consumer behavior among international travelers amidst an evolving travel retail landscape and an increased preference for experiential retail and digital touchpoints. The analysis of global traveling consumer shopping behavior examines trends and patterns across major categories from 2018 to present day, with projections through 2025 using m1nd-set's predictive analytics. The report focuses on key performance indicators (KPIs) impacting travel retail, including footfall and purchase drivers. It explores the evolution of impulse versus planned purchases, purchase destination preferences, pricing, shop attractiveness, gifting, and the role of experiential retail.

## Air Traffic 2025 – Regional Trends

International Departures + Arrivals ; Direct + Transfer



### Air traffic trends: key findings

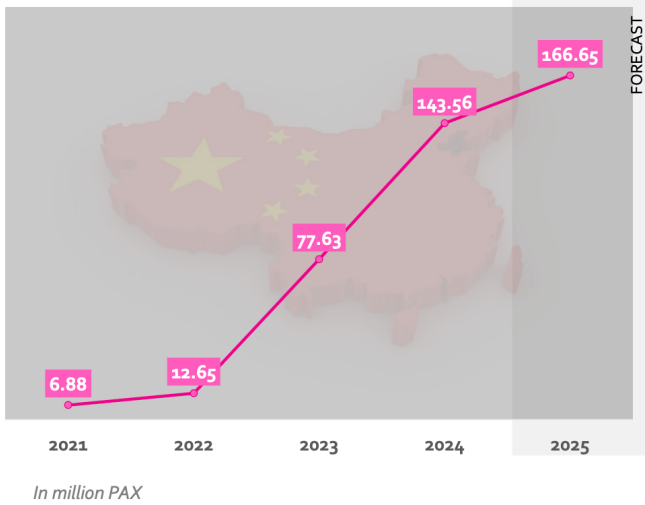
Key trends identified in m1nd-set's 2025 Annual Forecast Report for global air traffic in 2025 include the sustained growth in global passenger numbers. The report demonstrates how air passenger traffic has consistently grown since 2021, quadrupling over five years, and projects global passenger numbers will reach 4.22 billion in 2025, an increase of 8.3% on 2024 figures.

Shifting regional shares is another key trend the report identifies. According to m1nd-set, Europe will remain the largest contributor to international traffic, with nearly 2 billion passengers in 2025. However, its share will continue to decline, dropping from nearly 60% in 2021 to 46.9% in 2025 due to rising competition from other regions. Asia Pacific shows the strongest growth, m1nd-set's forecast reveals, increasing from 6% in 2021 to 25.5% in 2025, driven by post-pandemic recovery, economic growth, and enhanced connectivity. The region is set to exceed 1 billion passengers in 2025.

North America maintains steady traffic growth, projected at 442 million passengers in 2025, though its global share will slightly decline to 10.5%, m1nd-set reveals. The Middle East is also experiencing a declining share, which will drop from 8.3% in 2022 to 7.3% in 2025, with 310 million passengers forecasted. Latin America and the Caribbean will surpass 250 million passengers in 2025 but, with Asia Pacific's air traffic revival, it too will experience a declining global share, falling from 9.4% in 2021 to just over 6% in 2025. Africa will grow from 54 million passengers in 2021 to 152 million in 2025, but its share of global traffic decreases from 5.2% in 2021 to 3.6% in 2025.

# Air Traffic 2025 – China Trend

International Departures + Arrivals ; Direct + Transfer



In million PAX



China, which only had very minimal market share in terms of international passengers in 2021, due to the pandemic-related travel restrictions, has shown a remarkable recovery and ascent in international air traffic rankings between 2021 and 2024.

In 2021, the strict travel restrictions limited its passenger numbers to just under 6.9 million. As restrictions eased however, passenger numbers grew by more than 80% to over 12 million in 2022 and surged dramatically to 77.6 million in 2023, **posting more than 500% growth.**

This explosive growth continued in 2024, with passenger numbers **nearly doubling to more than 143.5 million** in 2024 with a projected further **16% growth to 166 million in 2025.**

By 2025, China will once again be positioned as a **key global player in air travel, as it enters the top 5 markets** for international passengers, boosted by China's expanding middle class and growing disposable income.

Over this five-year period, **China's market share** for international travelling nationalities, has increased exponentially, from less than 1% in 2021 and 2022, to a projected share of around **4% in 2025.**

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## Airport and nationality analysis

m1nd-set's 2025 Forecast Report reveals diverse recovery trends for global airport rankings. Key European and Middle Eastern hubs, including London Heathrow and Dubai, maintain dominance for international air traffic, but Asia Pacific airports, such as Singapore Changi and Seoul Incheon, are rapidly climbing the ranks following the post-pandemic resurgence, according to m1nd-set. European hubs Paris Charles de Gaulle and Amsterdam Schiphol also maintain strong positions, ranking 5th and 6th respectively in 2025 for international air traffic. Analysis of international air traffic trends by nationality reveals a shift in dominance from mature markets like the US and Europe to rapidly growing Asian markets, with countries such as China, India, and South Korea ascending the global rankings. By 2025, China is projected to enter the top five markets for international passengers, reflecting Asia Pacific's expanding influence.

## Shopper behavior insights

According to m1nd-set, the dynamic evolution of international air travel and shopper behavior underscores the importance of consistently monitoring market trends and consumer behavior to keep travel retail ahead of the curve. "To attract travelers and encourage in-store purchases, it is essential to meticulously curate the travel retail environment," comments m1nd-set owner & CEO Dr. Peter Mohn. "This involves reimagining every stage of the shopper's journey with a focus on delivering a best-in-class customer experience. From the airport or cruise ship setting, particularly in areas near the stores, to in-store design, merchandising displays, interactive touchscreens, retail activations, signage, packaging, and staff interactions, every element must be thoughtfully crafted. Every touchpoint of the journey must be designed to captivate, evoke emotion, and provide a truly immersive and memorable experience."

"The 2025 Forecast Report equips travel retail stakeholders with actionable insights to navigate challenges, capitalize on emerging opportunities, and foster meaningful connections with travelers in a rapidly evolving market landscape." Mohn concluded.