



IAADFS confirms conference sessions for 2023 Summit

The International Association of Airport and Duty Free Stores has confirmed the conference sessions planned for the 2023 Summit of the Americas, which will be held April 16-19, 2023, at the Palm Beach County Convention Center in West Palm Beach, Florida.

This year the Association is presenting a more streamlined education program with a morning and afternoon session each day on Monday and Tuesday.

The morning sessions will be from 8:00 – 9:00 am, with the exhibit hall and private rooms opening at 9:00 am. The afternoon sessions will be from 1:00 – 2:00 pm. This schedule reduces the amount of time that attendees must select between attending sessions vs. attending meetings.

While a few aspects of the program are still being finalized, confirmed sessions and speakers include:

**Keynote Address – 8:00-9:00 am
Monday, April 17, 2023**

IAADFS Welcoming Comments – Rene Riedi, IAADFS Chair

Scott Miller, Senior Advisor on Thought Leadership, Franklin Covey

Renowned speaker and best-selling author Scott Miller has led C-Suite conversations with some of the world's leading executives and has one of the largest and fastest-growing leadership podcasts. His practical and engaging session promises to stimulate and inspire attendees to think and act differently, which is critical in today's rapidly evolving business world.

IAADFS offers special thanks to **Stellar Partners** and CEO **Padraig Drennan** for sponsoring the keynote address.

Airports – Critical Partners for the Duty Free and Travel Retail Business 1:00 pm – 2:00 p.m.,

Kevin Burke, Airports Council International – North America

Rafael Echevarne, Airports Council International – Latin America and the Caribbean

Hear from two of the region's most influential leaders sharing insights on the dynamics and ever-changing developments facing airports across North America, Mexico, Central and South America, and the Caribbean, including how infrastructure demands, labor challenges, security requirements, ensuring adequate dwell time for shoppers, and regulatory hurdles are being addressed to help advance our business.

Moderator: **Rene Riedi**, IAADFS

Regional Recovery, Global Context 8:00-9:00 am

Tuesday, April 18, 2023

Tania Lee, Blue Water Bridge Duty Free and Frontier Duty Free Association

Cyril Letocart, Lagardere Travel Retail Peru

John Hume, Penta Group

John Rimmer, Tax Free World Association

This session will focus on the regional challenges and opportunities facing the Americas duty free and travel retail industry and global issues that impact the region, including important advocacy issues. A panel of industry colleagues with expertise in these important issues will share their perspectives.

John Rimmer, Managing Director, TFWA will moderate the session.

Building a Resilient, Sustainable Future

Matthew Greenbaum, International Shoppes

Enrique Urioste, Dufry

Andrew Weddig, Airport Restaurant & Retail Association Moderator: **Dermot Davitt**, *The Moodie Davitt Report*

The international aviation ecosystem has recovered rapidly over the past year, but in some key respects business is not back to normal. The pandemic and its consequences have forced many short- and long-term changes; how we manage these carefully and collaboratively will determine the shape of our sector's future.

In this session, co-organized by the Airport Restaurant & Retail Association and *The Moodie Davitt Report*, the speakers explore ways to evolve the airport concessionaire business framework to support a sustainable, resilient and equitable future for our industry.

Visit www.2023summitoftheamericas.org/Sessions for additional information about the conference sessions. Participation in the conference sessions is open to all registered attendees.

Strong exhibitor support

The IAADFS reports that the number of companies taking space for 2023 is up 44% compared to 2022 – and with new exhibitors continuing to be added. [Click here](#) to see a list of exhibitors confirmed to date.

Summit of the Americas:

Discounted registration ends after Feb 24

The International Association of Airport and Duty Free Stores has announced that attendees must register by **February 24** to receive discounted registration fees –\$50 off the regular full registration rate.

All full registrations for the 2023 Summit include access to the exhibit/meeting areas, conference sessions, and all official networking events.

The IAADFS also offers a daily registration option (\$200) that provides access to all official Summit activities on the day(s) purchased.

More information about the 2023 Summit is available on the [2023 Summit website](#).

Hotel booking

The 2023 Summit has designated three official hotels – the Hilton West Palm Beach, which is connected to the convention center via an internal walkway, the Hyatt Place West Palm Beach/Downtown, and the West Palm Beach Marriott. All official hotels are within .7 miles (1km) of the convention center.

The final room reservation deadline is **Friday, March 17, 2023**, but IAADFS says that there is no guarantee that rooms will remain available through this date, especially at the Hilton.

The show organizers encourage those who need a hotel to book space as soon as possible.

The only way to book in the official blocks and receive the negotiated rates is to use the online hotel booking link provided by each hotel - see the [Summit housing page](#) for more information about room rates and the housing links for each hotel.





BY THE NUMBERS

**TRAVEL MARKETS
INSIDER**

U.S. forecasts nearly 63m visitors in 2023

The U.S. International Trade Administration (ITA) released data on Feb. 17 forecasting international visitation to the United States to increase to 62.8 million in 2023, up 11 million, or 21.2%, from a total 51.8 million visitors in 2022.

The forecast also estimates international visitation to reach 82.4 million in 2025, surpassing pre-pandemic 2019 visitation of 79.4 million.

International visitation is forecasted to reach 91 million in 2027. If reached, this would exceed the 90 million visitor five-year goal set by the **2022 National Travel and Tourism Strategy** to rebuild and strengthen the industry.

ITA's National Travel and Tourism Office (NTTO) estimates

MIA reports record passenger traffic in 2022

Miami International Airport (MIA) served more than 50.6 million passengers in 2022, shattering its record of 45.9 million set in 2019 by nearly 10% and surpassing Orlando International Airport's (MCO) 2022 total of 50.1 million travelers last year by half a million.

MIA welcomed a record 29.3 million domestic travelers in 2022 compared to 23.5 million in 2019. It also served 21.3 million international passengers, which was one million less than in 2019 but 8.3 million more than in 2021.

Compared to 2021, when the aviation industry was still recovering from the pandemic, MIA served 13.3 million more passengers in 2022 than in 2021 (37.3 million), up 35% year over year.

Hub carrier American Airlines and its subsidiary Envoy, served

MIA reports that its record-breaking year follows its highest rankings ever among airports in the U.S. and worldwide in 2022, according to Airports Council International's annual report:

- #1 U.S. airport for international passengers and international freight
- #4 U.S. airport for total freight
- #10 U.S. airport for total passengers
- #9 global airport for international freight and total flight operations
- #10 global airport for total freight
- #11 global airport for international passengers
- #12 global airport for total passengers

that 90 million international visitors would spend \$279 billion across the nation.

The international visitation forecast includes actual annual visitation for years 2019-2022 and forecasted annual visitor volume for years 2023-2027. The forecast covers: Total All Countries; Overseas (which excludes Canada and Mexico); and the 18 largest source markets based on 2019 visitor volume.

The forecast of international visitation includes three measurements: volume (in thousands); annual percent change; and share of 2019 volume for each covered source market.

[Download NTTO's full data forecast.](#)

31.5 million passengers at MIA in 2022, representing 63% of the airport's total. This was an increase of nearly one million passengers over 2019.

Since 2019, MIA has also added low-cost carriers Spirit Airlines, Southwest Airlines, and JetBlue Airways, which now rank as the airport's second, fourth, and eighth-busiest passenger airlines in seat capacity, respectively.

MIA also welcomed 15 new international routes in 2022: six in the Caribbean (Camaguey, Holguin, Santa Clara, Santiago de Cuba, and Varadero, Cuba; and San Salvador, Bahamas); five in South America (Brasilia, Fortaleza and Manaus, Brazil; and Bucaramanga and Santa Marta, Colombia); three in Europe (Dublin, Ireland; Paris, France; and Rome, Italy); and Vancouver, Canada.

November outbound U.S. travel nearly at 2019 level as inbound tourism up +60% vs 2021

Data recently released by the National Travel and Tourism Office (NTTO) show that in **November 2022 travel** to the United States increased for the 20th consecutive month on a year-over-year basis, while total U.S. citizen international visitor departures from the United States reached 92% of total departures in pre-pandemic November 2019.

International arrivals to the U.S.

Total non-U.S. resident international visitor volume reached 4,601,142, up 61.3% compared to November 2021. This volume is 75.5% of the pre-COVID visitor volume reported for November 2019, (down slightly from 76.8% in October 22).

Overseas visitor volume (which excludes Canada and Mexico) to the United States was 1,941,001, up 54.9% from November 2021.

The largest numbers of international visitor arrivals were from Canada (1,472,487), Mexico (1,187,654), the United Kingdom (281,585), Brazil (109,991) and

U.S. tourism revenues reach highest volume since start of pandemic

NTTO reports that international visitors spent nearly \$16.5 billion on travel to, and tourism-related activities within, the United States in December 2022, an increase of nearly 49% compared to December 2021. This was the single highest month for US tourism-related exports since February 2020 when the global pandemic began.

Americans spent more than \$15.5 billion traveling abroad, yielding a balance of trade surplus of \$932 million for the month.

Preliminary data (subject to future revisions) suggests that international visitors in 2022 spent nearly \$162.6 billion on U.S. travel and tourism-related goods and services, nearly doubling (up 96%) the amount spent in 2021.

International visitors injected, an average of \$445+ million a day into the U.S. economy in 2022.

Germany (107,846). Combined, these top five source markets accounted for 68.7% of total international arrivals.

Of the top 20 tourist generating countries to the United States, Colombia (with 68,061 visitors), Ecuador (with 34,877 visitors) and the Dominican Republic (with 36,068 visitors), were the **only countries that reported a decrease in visitor volume in November 2022** compared to November 2021, with respective changes of -17.6%, -11.9%, and -7.4%.

International departures from the United States

Total U.S. citizen international visitor departures from the United States were 6,661,750, up by 41% compared to November 2021. This represents 92% of total departures in pre-pandemic November 2019.

Year-to-date (YTD) through November 2022, total U.S. citizen international visitor departures from the United States reached 72,873,660, a YOY increase of 69.3%.

The YTD market share for North America (Mexico & Canada) was 53% and overseas was 47%.

Combined YTD, Mexico (30,305,079) and the Caribbean (8,258,059) accounted for more than half of total U.S. citizen international visitor departures-- 52.9%-- up 0.2 percentage points from October 2022 YTD.

Mexico recorded the largest outbound visitor volume of 2,972,219 (44.6% of total departures for November and 41.6% YTD).

Canada recorded a YOY increase of 103.8% in November.

November U.S. outbound visitor volume to Europe was up 89.9% compared to November 2021, reaching more than 14.55 million (14,555,105).

YTD, Europe was the second largest market for outbound U.S. visitors through the first eleven months of 2022. During this time, U.S. visitor volume to Europe increased 217% and accounted for 20% of all departures.

DFWC quarterly global shopping monitor reveals swings in shopping drivers and influencers

The Duty Free World Council (DFWC) reports significant changes in both purchase drivers and barriers, as revealed in the DFWC Q3 global shopping monitor.

The research, which has been commissioned by the DFWC from Swiss-based research agency m1nd-set, was conducted over the three months from July – September 2022 and compares the findings with pre-Covid shopper behavior during the same period in 2019.

One of the most significant evolutions from the pre- to post-Covid period is the decline in importance of the key shopping drivers, albeit with one exception. At the same time, the main barriers to purchase have, for the most part, increased among shoppers.

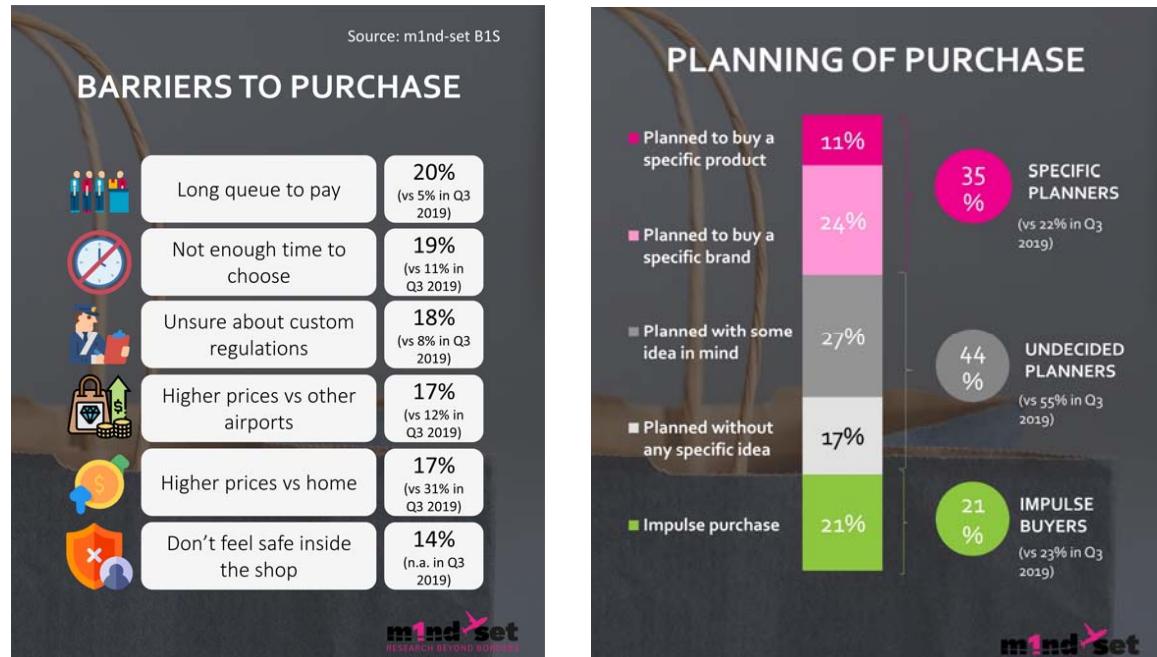
Value for money and price advantage, the top two purchase drivers, declined from 32% and 30% of shoppers citing these in Q3 2019 to 18% and 17% respectively in Q3 this year.

Convenience as a reason to purchase was quoted by over a quarter of shoppers in Q3 2019 but by only 16% during the same period this year.

Both dwell time and brand loyalty were quoted by 15% of shoppers in Q3 2022, down from 20% and 18% of shoppers in 2019. The only purchase driver which has seen an increase among shoppers over the 3-year period is special editions / duty free exclusives, which rose from 12% in 2019 to 15% in 2022.

Shopping barriers have consistently increased, with more shoppers citing long queues, insufficient time, uncertainty over custom regulations and higher prices compared to other airports as reasons for not purchasing at an airport. The only exception was “higher prices vs home,” which fell over the three years from 31% in Q3 2019 to 17% in Q3 this year.

The percentage of global shoppers planning their airport shop-



ping with a clear idea of what they want has increased quite significantly from the pre- to post-Covid period, according to the DFWC shopping monitor - 35% of shoppers planned to purchase either a specific product or brand this year, compared to only 22% in 2019.

Undecided planning has decreased over the three years on the other hand, down from 55% in 2019 to 44% in Q3 2022. The percentage of shoppers purchasing on impulse has decreased only slightly from 23% to 21%.

Shoppers have become more self-indulgent since Covid, the research reveals, with 50% of shoppers purchasing products for themselves in Q3 2022, up from 45% in 2019; while gift shopping has declined from 41% to 29% over the 3-year period.

Sarah Branquinho, DFWC President commented on the quarterly monitor: “We are delighted to see the return of the DFWC shopping monitor in partnership with m1nd-set.

“Shopping behavior today is quite significantly different from pre-pandemic times and the research highlights the importance of frontline customer-facing staff.

“The monitor shows how the percentage of shoppers engaging with sales staff has increased from 49% to 71% over the past three years. This demonstrates the importance of staff training, which is why the Duty Free World Council has invested in the DFWC academy.

“The success rate of staff interactions has also increased significantly, up from 51% in 2019 to 78% this year. We cannot emphasize enough the importance of training programs, like those offered by the DFWC Academy to ensure staff have all the necessary tools at their disposal to engage successfully with shoppers and potential shoppers in the travel retail environment.”



ACI forecasts global passenger traffic to reach 92% of 2019 levels this year

Airports Council International ([ACI World latest quarterly airport traffic outlook \(released on Feb. 22, 2023\)](#) shows an upsurge in air travel demand across many markets amidst heightened macroeconomic risks.

The quarterly update is released in tandem with the annual *ACI World Airport Traffic Forecasts*, revealing expected air traffic to 2041.

2022 and short-term outlook

One of the most important highlights of the industry outlook for 2023 is that ACI is forecasting global passenger traffic will reach 92% (equal to 8.4 billion passengers) of 2019 levels in 2023. Despite macroeconomic headwinds, says the organization, traveler sentiment remains strong, and the re-opening of China will support the ongoing recovery.

For now, global passenger traffic finished 2022 at 72% of 2019 levels – international passenger numbers reached 60% of 2019 levels and domestic traffic was at 79% in 2022.

The recovery in passenger volumes in 2022 remained uneven across the globe --Latin American-Caribbean markets reached 91% of 2019 levels whereas the Asia-Pacific region lagged at 52%.

The baseline projections for global passenger traffic indicate that industry passenger traffic will recover to 2019 levels by 2024.

ACI World Director General Luis Felipe de Oliveira said: “The surge in air travel following the lifting of restrictions in 2022 continues into 2023. We know from our Global Traveler Survey covering 4,125 respondents across 30 countries, that 86% of respondents plan to travel by air in 2023—this is the highest intention to travel score since the beginning of the pandemic.

“However, we are cognizant that the speed of the recovery depends on several factors. On the one hand, the possible slowing in GDP growth in major economies coupled with the rise in airfares due to higher jet fuel prices weigh negatively on demand. On the other hand, a strong labor market and the re-opening of China, the second largest aviation market after the United States, represents an important boost to global passenger traffic.”

ACI World Airport Traffic Forecasts 2022–2041

Looking ahead, the *ACI World Airport Traffic Forecasts 2022–2041* reveals:

Passenger traffic worldwide is expected to reach 19.3 billion in 2041.

In 2041, airports are predicted to handle almost 200 million tons of air cargo worldwide. The United States and China will remain the two largest markets, together accounting for 40% of global cargo.

Airports worldwide will see 153.8 million aircraft movements by 2041. The United States, China, and India are predicted to be the leading markets for aircraft movements in 2041, respectively, hosting 23%, 16%, and 4% of global aircraft movements.

TAIRO International honors longest-serving employee and welcomes key new senior appointment

Miami fragrance company TAIRO International, a leading fragrance and cosmetics distributor in Mexico and the Caribbean which marked its 25th anniversary last year, is celebrating milestones for two of its own.

TAIRO is honoring **Sales Director Ricardo Rivas**, one of the company's longest-serving employees, who is celebrating 20 years with the company this year.

“Ricardo has been a dedicated employee of the company for two decades, and during that time has shown the true meaning of teamwork, innovation, and leadership,” **TAIRO CEO Robert Bassan** tells *TMI*.

“Ricardo’s 20-year milestone is a testament to his loyalty and dedication to the company, and its longevity. He has developed strong relationships with key clients and field partners, which has enabled him to bring an innovative and unique hospitality approach to TAIRO International. His ability to build on this and motivate others around him to do the same has been an integral part of the success of TAIRO,” continues Bassan.

“Ricardo Rivas’ 20-year milestone is a momentous occasion for TAIRO International. As the company looks to the future, Ricardo’s commitment to the team

and his drive for innovation will be a key part of our continued success.”

Lourdes Mejia

TAIRO International also announces the addition of a key new member of its team with the appointment of **Lourdes Mejia** to the position of **Trade Marketing Director**, as of February 1, 2023.

With more than 20 years of experience in the beauty industry and a deep understanding of distribution into Travel Retail and local markets, Mejia brings significant expertise, relationships, and experience to her new role. Throughout her distinguished career, Mejia has worked for powerhouses such as Estée Lauder, Coty, and the LVMH Group.

In her position as Trade Marketing Director, she will be responsible for the development of relationships with key suppliers and house brands. This includes developing and overseeing trade marketing strategies and plans, managing trade marketing budgets, and providing strategic advice to the team. Additionally, Mejia will be responsible for driving sales and marketing through data-driven insights, developing and leading campaigns, and ensuring a successful launch of new products.

“TAIRO International is excited to welcome Lourdes and is confident in her ability to bring the skills and experience she has cultivated throughout her extensive career to her new role. With her extensive knowledge and expertise, she is poised to make a positive impact in the development of trade marketing for TAIRO International,” said Bassan.

TAIRO International colleagues and customers created a heartfelt video homage to Ricardo Rivas on his 20th anniversary with the company.



Cayman Islands tourism exceeds target for 2022

The Cayman Islands welcomed 1,027,668 visitors in 2022, divided between 743,394 cruise passengers and 284,274 stayover visitors. Both cruise and stayover visitation exceeded goals set by the Cayman Islands Government.

Air Arrivals

For 2022, the Department of Tourism set a goal of 200,000 stayover visitors, with the aim to reach 40% of 2019 tourism tax revenue.

After a slow start in January, visitation increased rapidly month-on-month over the first half of the year, as the Cayman Islands Government phased-in its easing of travel restrictions.

At the end of August, when all travel restrictions were lifted, air arrivals soared. Visitation during

the last quarter of 2023 averaged 89% of 2019's numbers and for the full year, January through December, the Cayman Islands recorded 57% of 2019's visitation numbers. At the end of year, stayover visitation significantly exceeded the Department's goals.

Though the United States accounted for 80.8% of all stayover visitors, UK and Ireland was the fastest recovering market in 2022, reaching 77% of 2019's visitation level.

This was followed by Canada at 66% of 2019's level with Canada recording growth over 2019's numbers in July, October and December 2022.

Latin America was the third fastest recovering market reaching 60% of 2019's visitation.

Cruise ships returned to the

Cayman Islands in March 2022, and by December 2022, the destination had welcomed 743,394 cruise passengers on 261 ships.

Looking forwards to 2023

The Caymans have set an overall 2023 goal of 70% of 2019 numbers and Minister of Tourism Kenneth Bryan is confident the destination will achieve this.

"Our accommodation, restaurant and retail partners are primed to welcome guests, and we will continue strategic discussions with our airline partners to offer increased airlift to the destination to ensure a steady stream of visitors. We also look forward to working with our partners in cruise to further enhance and deliver an authentic destination experience," he said.

interCaribbean Airways ramps up regional connectivity with expanded Caribbean service

interCaribbean Airways has added two aircraft to its fleet and expanded its flight schedule to service seven Caribbean Islands.

The introduction of another Embraer ERJ-145 jet and an ATR42-500 series turboprop, with a seating capacity of 50 and 48 seats respectively, increases the carrier's fleet servicing to Barbados, Antigua & Barbuda, Grenada, Guyana, Saint Lucia, and Saint Vincent & The Grenadines beginning March 12, 2023.

The extended schedule now links the Eastern and Western Caribbean with a twice weekly service from Georgetown and Barbados via Antigua to Providenciales, (Turks and Caicos), connecting onwards to Nassau, Bahamas, Havana, Cuba and Kingston, Jamaica.

Founder and Chairman of interCaribbean Airways, Lyndon Gardiner, says the carrier is committed to expanding its service in the eastern islands

of the Caribbean, where travelers have been affected by the air travel void left during the pandemic.

interCaribbean Airways is a privately-owned and operated airline, headquartered in Turks and Caicos. With a network spanning from Georgetown Guyana in the south, Barbados to the east, Havana, Cuba to the west and Nassau, Bahamas to the north, interCaribbean connects 28 cities across 17 countries in the Caribbean.

Regarding the new flights, the St. Kitts Tourism Authority announced the initiation of three-times a week direct flights to and from Barbados with interCaribbean Airways (ICA) service beginning on Sunday, March 12, 2023.

"This partnership is a strategic step towards making regional travel more accessible to the island thus further connecting St. Kitts to the wider Caribbean," said the official announcement.

"Prior to the pandemic, the Caribbean was the second-largest source market of tourism for St. Kitts," said Minister of Tourism International Transport, Civil Aviation, Urban Development, Employment, and Labour Marsha T. Henderson.

"Since 2020, restrictions and lack of airlift across the Caribbean have severely impacted arrival numbers. The initiation of service with ICA will re-open St. Kitts to quick, reliable, and accessible travel across the islands and further support tourism expansion for the destination."

The interCaribbean Barbados service also offers one stop connecting flights to Grenada, St. Vincent & the Grenadines, St. Lucia, Dominica, and Georgetown, Guyana.

SSP America expands team

Food travel company SSP America, a division of SSP Group, has appointed two senior new members to its Business Development team to help handle its growth across airports in the United States, Canada, and Latin America.

Maria Martinez will be responsible for identifying new restaurants and maintaining a portfolio of brand relationships in key markets, as well as lead the brand development process during the design and construction phase to ensure each concept is translated effectively into an airport setting.

Martinez brings more than 15 years of experience in sales and business growth, most recently as the director business development for a prime concessionaire. She also represented global brands such as UPS, IHOP, Applebee's, Jack in the Box and Qdoba and currently serves as part of the Board of Directors for the Airport Minority Advisory Council

Jen Juul has joined SSP Americas as the senior director of business development and strategic communications. She is responsible for the acquisition of new business, identifying new local brands, and managing the company's industry networking events. She will also serve as a primary interface with industry organizations in support of the larger aviation community.

Juul most recently worked with a global food and hospitality company and also served as the business development manager for *Airport Experience News*. This followed a decade of working as an independent consultant executing corporate events in the airport and hospitality industries.

Her career includes a series of increasingly senior positions with Boston Beer Company where she was last the senior national account manager for airports and arenas, developing the Samuel Adams restaurants through the entire life cycle from conception to operations.