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INTERNATIONAL

The EU looks at benefits of arrivals duty and tax free airport shopping as a key element of recovery plan

Airports Council International Europe (ACI Europe) and the European Travel Retail Confederation (ETRC) are calling on the European Union to review current legislation to allow passengers traveling from third countries to buy duty and tax free on arrival in EU airports.

An independent report commissioned by ETRC from York Aviation was launched on Wednesday. The report, which outlines the potential economic benefit achievable through the introduction of arrivals Duty and Tax Free shopping at EU airports, was presented at an online webinar on Oct. 28 with introductory comments from **Nigel Keal** (President, ETRC) and Europe Deputy Director General **Morgan Foulkes**.

Following their introductions, **James Brass** (Partner, York Aviation) presented the key findings from the economic impact study outlining the potential economic benefits achievable through the introduction of arrivals duty and tax free shopping at EU airports.

ACI EUROPE and ETRC are calling on the European Union to review current legislation to allow passengers traveling from third countries to buy duty and tax free on arrival in EU airports.

Estimated Impact of Duty and Tax Free Arrivals Shops across the EU



The chart above provides an assessment of the impact of duty and tax free arrival shops in the EU through to 2024 assuming recovery broadly in line with ACI EUROPE's traffic forecasts.

Adjusting for COVID effects and BREXIT, this assessment sees an initial impact of around €1.3 billion in GVA, 12,100 jobs and €475 million in tax revenues, rising to €3.5 billion in GVA, 33,700 jobs and €1.3 billion in tax revenues.

Introducing duty and tax free shopping on arrival is a cost-free way for EU governments to support the aviation ecosystem and to maintain airport jobs, especially in light of the COVID-19 pandemic, which has created the greatest crisis the global and EU aviation industry have ever experienced.

Based on 2019 traffic figures, the analysis found that duty and tax free arrival shops would have generated around €4.3 billion in Gross Value Added (GVA), supported 41,500 jobs and generated €1.6 billion in tax revenues.

These significant benefits are achievable by realizing a commercial opportunity that remains

entirely untapped, the report estimates that arrivals duty and tax free sales could make up 20% to 30% of total travel retail sales at EU airports.

Furthermore, as the UK is scheduled to leave the EU on January 1, the numbers of non-EU passengers will increase substantially, and many smaller airports would see the benefits from arrivals Duty Free.

Recognizing the impact of COVID-19 on air traffic, the report concludes an initial impact per million passenger of around €1.3 billion in GVA, 12,100 jobs and €475 million in tax rising to €3.5 billion in GVA, 33,700 jobs and €1.3 billion in tax revenues.

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GEA STEPS DOWN AT DUFRY

Jose Antonio Gea, one of Dufry's most key senior executives for the past 16 years, will step down from his position of Deputy CEO and member of the Global Executive Committee as of December 31, 2020.

Gea joined Dufry as Global Chief Operating Officer in 2004 and was appointed Deputy Group Chief Executive Officer in 2018.

Julián Díaz, CEO of Dufry Group, commented: "In the name of the Dufry Board of Directors and the management team, I would like to thank Jose Antonio Gea for his extraordinary and long-lasting contribution to and performance for the growth of the company. Jose Antonio joined Dufry in 2004 and continuously evolved Dufry's operational excellence with great dedication thus successfully aligning the business model to both the growth of the company as well as the changing market and customer requirements. We wish him lots of success for his future professional endeavors and all the best for his private life."

Dufry has appointed **Salvatore Aricò** as Chief Organization & Transformation Officer to the GEC reporting to the CEO. Aricò is currently Dufry's Global Human Resources Director. He joined the company in 2014 during the Nuance acquisition and has an in-depth knowledge of the travel retail industry.

In his new role, effective January 1, 2021, Aricò will focus on driving the further development and transformation of the company organization. The Human Resources department will remain within the area of responsibility of **Luis Marin**, Chief Corporate Officer.

Díaz comments: "... Salvatore has been instrumental in the integration of our transformational acquisitions of Nuance and World Duty Free and has ever since successfully contributed to shape the new company culture and drive the evolution of Dufry's organization."

 **DUFRY**

Grab partners with AtYourGate to deliver integrated meal delivery service at PHL

Airport e-commerce platform Grab continues to expand its contactless food services to airport locations throughout the United States.

PHL Food & Shops, the concessions program at Philadelphia International Airport (PHL) run by Marketplace Development, is the first airport program in the U.S. offering a collaboration between Grab and in-airport food delivery service AtYourGate.

The service allows passengers and employees to order meals through a variety of digital channels, offering contactless meal ordering and delivery capabilities.

Passengers can download the app to their mobile device or visit at orderatphl.com. Travelers and airport employees can also scan various Grab QR codes placed throughout PHL to order food and get it delivered on the go.

Participating merchants are searchable by food type and terminal, and orders can be delivered right to their gate, which enhances proper social distancing measures that ensure the health and well-being of travelers and employees.

"The Grab Airport app featuring delivery by AtYourGate, offers our travelers a contactless solution to

ordering their favorite food right from their mobile devices," said Mel Hannah, Vice President and General Manager of MarketPlace PHL. "The health and well-being of our passengers and employees is our top priority, and we're excited to now offer delivery as an option. Simply find what you want, order, and relax while you wait for your flight."

"The existence of new, safety-focused dining and retail options such as AtYourGate's contactless delivery service will be a vital component of the passenger's expectations when they return to air travel," said PJ Mastracchio, Founder and CEO of AtYourGate in a release issued in June.

The partnership will be offered to airports in North America. AtYourGate operates in 9 airports in the United States and has delivered over 100,000 orders to airport guests.

Grab is offered at 60 airports worldwide and growing, and has a direct partnership with American Airlines, offering the added convenience of ordering through the American app.

The Grab app was also recently launched in ATL, Tampa, Houston and LAX, among other locations.



AtYourGate collecting an order at Geno's Steaks at PHL.

The Economic Impact of Arrivals Duty and Tax Free Shopping in the EU
OCTOBER 2020



ETRC report looks at benefits of Arrivals Duty and Tax Free airport shopping in the EU

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Arrivals duty and tax free shops are commonplace in most airports around the world, including all EEA countries (Norway, Iceland & Switzerland) where it is very popular with arriving passengers. But under current EU legislation, duty and tax free sales are only allowed to passengers 'leaving' the European Union.

Allowing Duty and Tax Free shopping on arrival for passengers traveling from third countries to the EU will restore competition for EU airports vis a vis their international counterparts, by creating much-needed revenue and supporting employment at EU airports at this crucial time.

ETRC President Nigel Keal stated: "The introduction of EU Arrivals Duty and Tax Free shopping presents us with a great opportunity to renew the outdated approach to arrivals shopping in the EU. As allowances will remain the same, this proposal will simply give

passengers another opportunity to avail of their duty & tax free allowance and to choose to support their local airport rather than buy abroad. Our members will be driving the biggest ever industry recovery effort in the coming years - allowing arrivals Duty and Tax Free will greatly facilitate this."

ACI Europe Director General Olivier Jankovec stated: "EU airports are currently facing the most difficult trading conditions in modern history and are urgently in need of government support. Given the unique role that airports play as economic gateways, it is imperative that all steps are taken to keep them open through these difficult times. EU airports are currently losing hundreds of millions of euro of potential commercial income to their non-EU counterparts each year. Arrivals duty and tax free will allow retail sales to be displaced from third countries back to the EU airport of arrival."

To download a copy of the executive summary of the report please [click here](#).



m1nd-set: Shoppers see technology as key future trend for travel retail

Technology, the store experience and sustainability emerge as important trends that will influence shopper behavior according to the latest m1nd-set consumer insights study. The study was conducted among 1500 consumers who have traveled internationally in the past 12 months, and queried shoppers' views on the key emerging retail trends and influencing factors that will impact their shopping behavior in the future.

Technology advancements emerged as the number one influencing factor according to m1nd-set. Among the key trends, same-day and next-day delivery options which have grown significantly during the pandemic, will become increasingly commonplace, forcing many retailers to rethink their supply chain logistics.

Click-and-collect has also seen significant growth in recent months, with more than 25% of shoppers expressing the importance of this feature among the delivery options.

Other 'technology' trends cited include greater personalization in the marketing and product offer to individual consumers, including more use of facial recognition to allow greater personalization.

Visual search, which also responds to shoppers' desire for instant satisfaction and fulfillment, was also mentioned.

Augmented Reality (AR) shopping applications are set to increase in popularity reports m1nd-set, with more than three-quarters of shoppers in some developed markets expecting retailers to provide AR as part of the shopping experience.

The research also highlights trends that have grown considerably as a result of the pandemic, and which shoppers interviewed for the study say will become a more regular part of the shopping experience. These include contactless solutions including payment, delivery and even contactless stores, where QR codes and even robotics are expected to become increasingly more common in the retail space. Social shopping is the final trend cited under 'technology', where younger consumers – Millennials and Gen Z shoppers in particular – have a high tendency and propensity to purchase from 'shoppable' Instagram or Pinterest posts as well as via live-streams.

Peter Mohn, CEO & Owner at m1nd-set, commented on the research findings: "The research underlines the growing importance the pandemic has had on both sustainability and technology in retail as well as the importance of

unique in-store experiences.

"Shoppers are unquestionably more sensitive to responsible consumption now and sustainable values must be an integral part of the shopping experience for retailers to remain relevant. It's estimated that the pandemic has accelerated the shift to digital by around five years. Even when analysing the findings about the importance of the retail experience, we see that shoppers are looking for a more integrated experience, which combines both physical and digital – they want to experience in-store and purchase online," he said.

"The growing focus on digital has implications for the travel retail sector too of course. The 'immediacy' trend regarding delivery, with the growth of same-day delivery, click-and-collect options and the curb-side pick-up model we see in high-street retail, will need to be mirrored in travel retail with a

greater emphasis in the future on out-of-store pick-up locations between security and the gate or even seat-delivery on board the aircraft," Mohn continued.

The research identifies and acknowledges the investment that certain inflight retailers have been making in their online catalogue and home delivery service, and predicts that other airlines and their retail partners will inevitably follow their lead, as they compete for passenger ancillary spend.

"This contextual and circumstantial data," Mohn concludes, "when properly 'mined' and managed, will be the new gold. All stakeholders are being forced to rethink their business models and revenue strategies. If Airlines start to capitalise on their unique asset and invest more in the data management for ancillary revenue purposes, this could be a game-changer for the industry."

For more information, please contact info@m1nd-set.com.



Robots have become a more important tool to help retailers cut costs and maintain high quality of service while allowing employees to focus on higher value work. Checkouts becoming robotized, stock replenishment with scanner robots and robotic shopping carts which make the customer journey through a store more convenient, are just some examples of how the technology will change the face of retail.

Robotic in-store advertising, where the technology is used to enhance the customer experience will also help create a more engaging, interactive shopping experience. Motion sensors detect when a shopper approaches a specific product and, using robotic technology, the shelf or a specific product comes to life, lighting up, moving around and even speaking with the shopper.

The conversion rates on such robotic driven in-store promotions also make the investment an attractive one, generating significantly higher retention and sell-through rates than other forms of advertising, says m1nd-set.



One way in which AR technology will enhance the customer experience includes the possibility to virtually try on 3D products, says m1nd-set. COVID has made this feature all the more appealing to customers who prefer to avoid crowded stores, or touch products that scores of other shoppers may have touched. As well as fashion brands, this is already widely used by beauty brands for trying make-up.

CDC issues Conditional Sail protocol for safe resumption of cruise ship operations as it lifts No Sail order

The U.S. Centers for Disease Control and Prevention (CDC) has lifted the 'No Sail' order that has been in effect since March 14, and issued a detailed set of requirements that will enable cruise ships to safely resume sailing from U.S. ports.

Under the Conditional Sailing Order issued by the CDC on Oct. 30, cruise lines will need to meet strict protocols to assure that the ships are protecting passengers from COVID-19.

The Order applies to passenger operations on cruise ships with the capacity to carry at least 250 passengers in waters subject to U.S. jurisdiction.

The 'No Sail' order was due to expire on Oct. 31, after the CDC previously extended it three times since it was introduced in March. It is unlikely that any major line will return ships to service before Dec. 1, at the earliest, since most lines canceled all ships leaving from the U.S. through November.

The framework allows for a phased resumption of cruise ship operations.

"Considering the continued spread of COVID-19 worldwide and the increased risk of COVID-19 on cruise ships, a careful approach is needed to safely resume cruise ship passenger operations. CDC is establishing requirements to mitigate the COVID-19 risk to passengers and crew, prevent the further spread of COVID-19 to U.S. communities, and protect public health and safety," said the CDC in the Executive Summary of the Framework for Conditional Sailing.

"The initial phases will consist of testing and additional safeguards for crew members," it continues.

The 40-page framework includes detailed requirements that cruise lines will need to meet. The phased-in resumption of service will also be subject to change based on public health considerations and cruise ship operators' demonstrated ability to mitigate COVID-19 risk, says the CDC. It also allows for individual cruise lines to progress through phases at variable paces.

Noting that several cruise ship operators have taken steps to improve their public health response to COVID-19, the CDC framework document makes specific mention of the recommendations made by the Healthy Sail Panel gathered by Royal Caribbean Group and Norwegian Cruise Line Holdings, as well as the global science summit hosted by the World Travel & Tourism Council and Carnival Corporation.

While considering alternatives to this Conditional Sailing Order, the CDC said: "The current framework represents a tailored approach that was determined to be preferable to the status quo No Sail Order."

It explained: "...it allows for flexibility where cruise ships have taken the necessary precautions to mitigate risk, while continuing to prohibit passenger operations onboard ships that have failed to implement such precautions."

Among the recommendations called for, the CDC says it will "ensure cruise ship operators have adequate health and safety protections for crew while these cruise

ship operators build the laboratory capacity needed to test future passengers. Subsequent phases will include simulated voyages to test cruise ship operators' ability to mitigate COVID-19 risk, certification for ships that meet specific requirements, and a phased return to cruise ship passenger voyages in a manner that mitigates COVID-19 risk among passengers, crew members, and U.S. communities."

The CDC also says that it anticipates COVID-19 continuing to be present and affecting cruise ship travel.

As part of the initial crew testing phases, the Order additionally contains requirements for: (1) shore-side COVID-19 laboratory screening testing of all crew currently onboard; (2) onboard diagnostic testing capabilities for symptomatic travelers (crew and future passengers); (3) shoreside COVID-19 laboratory screening testing of all newly embarking crew; and (4) continued compliance by cruise ship operators with their complete, accurate, and acknowledged No Sail Order Response Plans.

CLIA and members commit to a return to passenger sailing with enhanced health and safety measures

Cruise Lines International Association (CLIA), which represents 95% of global ocean-going cruise capacity, issued the following statement in response to the U.S. Centers for Disease Control and Prevention's (CDC) Framework for Conditional Sailing Order that will replace the previous No Sail Order:

"Guided by the recommendations of leading experts in health and science, including the Healthy Sail Panel (HSP), our members are 100% committed to helping to protect the health of our guests, our crew and the communities we serve, and are prepared to implement multiple layers of protocols informed by the latest scientific and medical knowledge. We will continue to evolve our approach as circumstances evolve.

"The economic consequences of the ongoing suspension of service are felt in communities across the United States and with hundreds of thousands of jobs at stake, we are committed to resume sailing in a responsible manner that keeps public health in the forefront. We look forward to reviewing the Order in greater detail and working with the CDC to advance a return to cruising from U.S. ports."

CLIA members have been in a voluntary suspension of operations from U.S. ports for over seven months. In that time, CLIA member cruise lines have worked with leading outside experts in health and science to develop science-based measures to further strengthen public health protocols and mitigate the risk of COVID-19 for passengers, crews and destinations.

With enhanced measures in place—including 100% testing for passengers and crew prior to boarding, mask-wearing, physical distancing requirements, highly controlled shore excursions and many more—CLIA members have gradually resumed sailing in Europe and other parts of the world with success.

CLIA president and CEO Kelly Craighead, added:

"While we look forward to reviewing the new Order in detail, we expect much of the Healthy Sail Panel's recommendations, which were adopted by CLIA's Global of Directors earlier this month, have been considered and will serve as an important foundation."

"The cruise industry and the CDC have a long track record of working together in the interest of

public health, and we look forward to continuing to build upon this legacy to support the resumption of cruising from U.S. ports.

"With enhanced measures in place, and with the continued guidance of leading experts in health and science as well as the CDC, we are confident that a resumption of cruising in the U.S. is possible to support the economic recovery while maintaining a focus on effective and science-based measures to protect public health."

The full copy of the CDC's Framework for Conditional Sailing, please click [here](#).



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