



Bestselling coach and author Scott Miller named 2023 IAADFS Summit Keynote Speaker

The International Association of Airport and Duty Free Stores (IAADFS) has announced that bestselling author Scott Miller will serve as the keynote speaker to open the conference program for the 2023 Summit of the Americas, to be held April 16-19, 2023.



For the second year in a row, the event will take place at the Palm Beach County Convention Center In West Palm Beach, Florida.

Scott Miller is senior advisor on thought leadership at executive coaching company FranklinCovey. He leads the strategy, development, and publication of the firm's bestselling books.

Miller also hosts the FranklinCovey-sponsored *On Leadership With Scott Miller*, the world's largest and fastest-growing weekly leadership podcast, and *C-Suite*

Conversations, which features interviews with the world's top executives.

In addition to supporting FranklinCovey's global thought leadership efforts, Miller runs Gray+Miller, a speaking, literary, and talent agency representing some of the world's foremost leaders, authors, and thinkers.

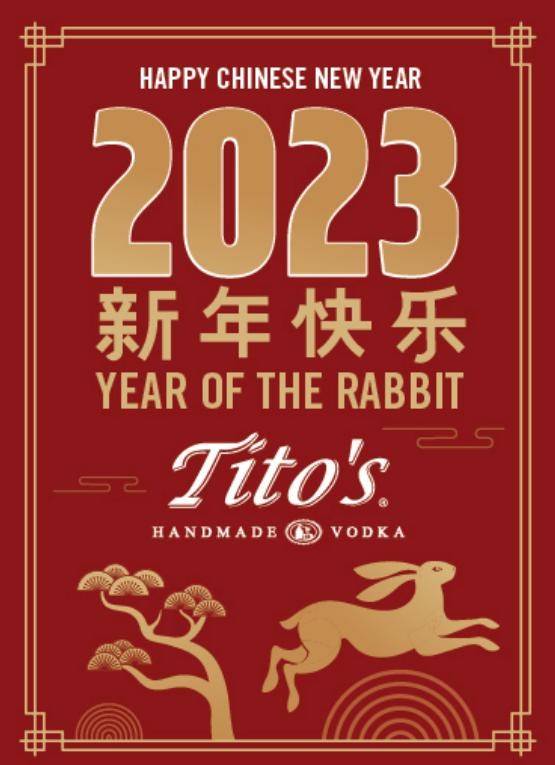
As a highly sought speaker and podcast guest, he has presented to hundreds of audiences across every industry and loves to share his unique journey as an unfiltered leader thriving in today's highly filtered corporate culture.

"We are excited to have Scott Miller kicking off our conference program for the 2023 Summit," commented IAADFS President and CEO Michael Payne.

"Scott's presentations at other events have been very well-received and we're looking forward to his participation."

IAADFS thanks Board member and Stellar Partners, Inc. President & CEO Padraig Drennan for his company's generous sponsorship of this keynote speaker.

The 2023 program will also include sessions in collaboration with content partners ACI-NA/ACI-LAC, ARRA, and TFWA.



UNWTO: Tourism set to return to pre-pandemic levels in some regions in 2023

The UN World Tourism Organization reports that international tourism saw stronger than expected results in 2022, backed by large pent-up demand and the lifting or relaxation of travel restrictions in a large number of countries.

The UNWTO estimates that global international tourism could reach **80% to 95%** of pre-pandemic levels this year, depending on the extent of the economic slowdown, the ongoing recovery of travel in Asia and the Pacific and the evolution of the Russian offensive in Ukraine, among other factors.

They expect international tourism arrivals will return to pre-pandemic levels in Europe and the Middle East this year.

All regions bouncing back

Europe, the world's largest destination region, recorded 585 million arrivals in 2022 to reach

nearly 80% of pre-pandemic levels (-21% over 2019).

The Middle East enjoyed the strongest relative increase across regions in 2022 with arrivals climbing to 83% of pre-pandemic numbers (-17% versus 2019).

Africa and the Americas both recovered about 65% of its pre-pandemic visitors, while Asia and the Pacific reached only 23%, due to stronger pandemic-related restrictions.

By subregions, Western Europe (87%) and the Caribbean (84%) came closest to their prepandemic levels.

The UNWTO Panel of Experts survey indicates that 72% of respondents expect better performance in 2023. However, most experts (65%) also believe international tourism will not return to 2019 levels until 2024 or later.

In addition, UNWTO says that tourists are expected to increasingly seek value for money and travel closer to home in response to the challenging economic climate.

Earnings rebound

The WTO reports notable increases in international tourism receipts across most destinations, in several cases higher than their growth in arrivals. This has been supported by the increase in average spending per trip due to longer periods of stay, the willingness by travelers to spend more in their destination, and higher travel costs partly due to inflation.

Several destinations reported tourism receipts above pre-pandemic levels in the first ten to twelve months of 2022, including Turkey (+40%), Romania (+25%),

Mexico (+13%), Portugal (+15%), Latvia (+14%), Pakistan, Morocco (both +6%) and France (+1%).

The recovery can also be seen in outbound tourism, with strong international spending from major source markets such as France (-4% over 2019), Germany (-8%), Italy (-10% through October 2022) and the United States (-15% through November), compared to 2019. Emerging markets with robust rebound in spending in 2022 include Qatar (+29%), India (+10% through June) and Saudi Arabia (+7% through September).

The improved performance of air traffic is expected to contribute to the ongoing recovery of international tourism in 2023. However, international seat capacity is still 37% below 2019 levels through September 2022 (IATA).

Continued on next page.

UNWTO Barometer

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Chinese tourists set to return

The recent lifting of COVID-19 related travel restrictions in China, the world's largest outbound market in 2019, is a significant step for the recovery of the tourism sector in Asia and the Pacific and worldwide. In the short term, the resumption of travel from China is likely to benefit Asian destinations in particular. However, this will be shaped by the availability and cost of air travel, visa regulations and COVID-19 related restrictions in the destinations. By mid-January a total of 32 countries had imposed specific travel restrictions related to travel from China, mostly in Asia and Europe.

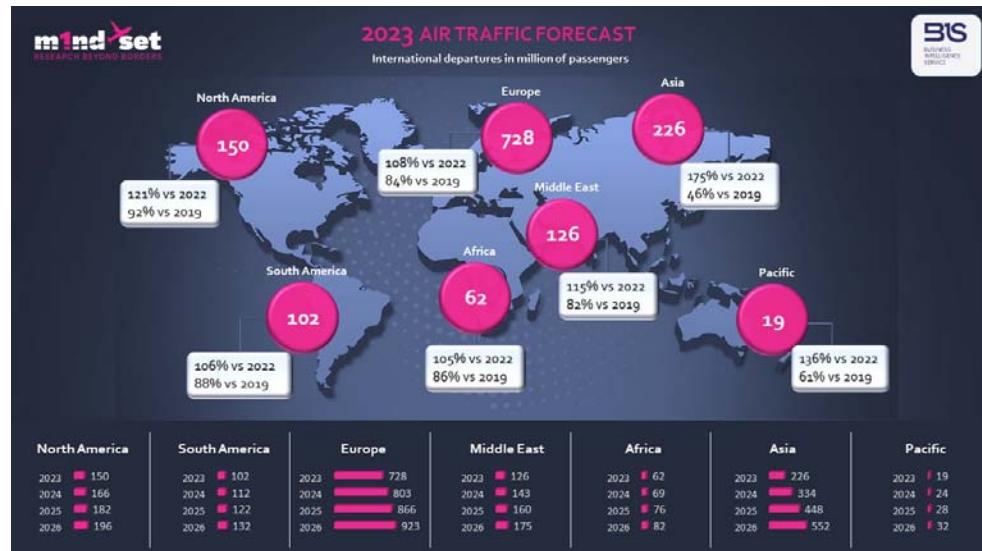
**Ed. Note: Industry experts say that even as China is reopening its borders, flights are likely to increase slowly due to pandemic concerns and a limit on available aircraft and crews. See more China insights on next page.*

At the same time, strong demand from the United States, backed by a strong U.S. dollar, will continue to benefit destinations in the region and beyond. Europe will continue to enjoy strong travel flows from the U.S., partly due to a weaker euro versus the US dollar.

However, the economic situation could translate into tourists adopting a more cautious attitude in 2023, with reduced spending, shorter trips and travel closer to home.

The latest UNWTO Confidence Index show cautious optimism for January-April, higher than the same period in 2022. This optimism is backed by the opening up in Asia and strong spending numbers from both traditional and emerging tourism source markets, with France, Germany and Italy, as well as Qatar, India and Saudi Arabia, all posting strong results.

APAC to see highest gains according to 2023 m1nd-set traffic forecast, but N. America to be first to surpass pre-pandemic air traffic in 2024



m1nd-set has released a 4-year air traffic forecast that runs through 2026. Both Asia and the Pacific will see the largest year on year percentage gains in air traffic in 2023 according to the travel retail research agency.

According to m1nd-set, Asia will see a **75%** increase in traffic this year versus 2022, reaching **226 million** passengers. This increase represents only 46% of the 2019 pre-pandemic traffic levels.

The Pacific region will see the second largest year-on-year traffic increase, up **36%** on 2022 levels, albeit from a smaller base, reaching **19 million** passengers in 2023. This represents 61% of the 2019 levels.

Traffic across Asia Pacific will reach pre-pandemic levels by 2026.

In **Asia**, international departures will eventually surpass the 2019 traffic in 2026 with 552 million passengers, growing from 334 million in 2024 and 448 million passengers in 2025. Asia will see the highest compound annual growth rate (CAGR) between 2023 and 2026 of 36%.

Air traffic in the **Pacific** will see a CAGR from 2023 to 2026 of 17%, growing from 19 million passengers this year, to 24 million in 2024, 28 million in 2025 and eventually surpass 2019 levels with 32 million international passengers by 2026.

North America will deliver the third largest growth percentage in 2023, reaching 150 million passengers, which is 121% of the 2022 traffic. North American traffic is nearly at the pre-pandemic level at 92% of 2019 traffic, and between 2023 and 2026 will see a CAGR of more than 7.5%.

Traffic will surpass the pre-pandemic level in North America by 2024, when international departures will reach 166 million. By 2025, traffic in North America will reach 182 million and 196 million by 2026.

The **Middle East** will see international air traffic increase by 15% in 2023 to reach 126 million--which is 82% of the 2019 level. The CAGR in the Middle East will fall just short of 10%, but traffic **will not surpass the pre-pandemic levels until 2025**, by which time international traffic will have reached 160 million, up from 143 million in 2024. In 2026, traffic in the Middle East will reach 175 million international departures.

Europe represents the largest world region for international air traffic with 728 million international departures forecast for 2023, up 8% on 2022 levels and 84% of the 2019 traffic numbers.

Europe will reach pre-pandemic traffic levels in 2025 also, when traffic will reach 866 million up from 803 million in 2024. European air traffic will experience a compound annual growth rate of circa 6.5% between 2023 and 2026, when traffic will reach 923 million international departures.

International air traffic in **South America** will reach 106% of the 2022 level to reach 102 million passengers -- 88% of 2019 traffic which was circa 115 million. In 2024, traffic will fall just short of the pre-pandemic 2019 level in South America at 112 million passengers, growing to 122 million in 2025 and 132 million in 2026, posting a CAGR of circa 7.4%.

Traffic across **Africa** will reach only 105% of 2022 levels at 62 million, around 86% of the pre-pandemic level. The region will see a CAGR of circa 8% 2023 and 2026, reaching 69 million in 2024, **surpassing the 2019 level in 2025** with 76 million and 82 million international passengers in 2026.

The m1nd-set traffic forecast is compiled via the agency's unique data tool, B1S in partnership with IATA and their air traffic data partner ARC.

ForwardKeys: The sleeping dragon awakens

The end of China's zero-Covid policy is fueling flight bookings

China's decision to ditch its zero-Covid policy has triggered a surge in flight bookings, according to the latest data from flight tracking agency ForwardKeys.

On Dec. 7, Chinese authorities announced that a negative PCR test would no longer be required for air travel between provinces. Domestic flight bookings immediately surged 56% on the previous week and continued to increase 69% the following week. On Dec. 26, China removed all COVID-related restrictions on domestic air travel; and bookings surged again, reaching 50% of 2019's level in the final week of the year.

As of Jan. 3, domestic flight bookings during the upcoming Chinese New Year period, Jan. 7 – Feb. 15, were 71% behind pre-pandemic (2019) levels and 8% behind last year, with the most popular destinations being Beijing, Shanghai, Chengdu, Kunming, Sanya, Shenzhen, Haikou, Guangzhou and Chongqing. Before the announcement on Dec. 7, they were 91% behind 2019.

China's aviation regulator plans to restore flight capacity to 70% of pre-pandemic levels by Jan. 6, and to 88% by Jan. 31. However, a full recovery is not possible immediately, as the industry needs some time to re-hire staff and meet all flight safety and service requirements.

China also announced on Dec. 26, that it would end the cap on the number of international flights to China and quarantine measures, as of Jan. 8. In addition, Chinese citizens can now renew expired passports and apply for new ones.

Outbound flight bookings between Dec. 26 – Jan. 3 jumped 192% compared to same period last year, but they are still 85% behind pre-pandemic levels.

Currently, the most popular return trips are to Macau, Hong Kong, Tokyo, Seoul, Taipei, Singapore, Bangkok, Dubai, Abu Dhabi and Frankfurt.

Notably, bookings to Abu Dhabi, which has traditionally been a major gateway between China and the West, are 51% behind 2019. Looking at onward bookings from there, 11% will go to Paris, 9% to Barcelona, 5% to London, 3% to Munich and 3% to Manchester.

ForwardKeys reports that 67% of bookings made between Dec. 26 and Jan. 3 were for travel during the Chinese New Year period.

Olivier Ponti, ForwardKeys VP Insights, commented: "Although Chinese New Year is likely to see international travel rebound for the first time in three years, we will need to wait longer before we see a resurgence in Chinese tourists exploring the globe. The reasons are:

"First, current scheduled international flight capacity is only at 10% of 2019's level; and owing to approval requirements for traffic rights and airport slots, it will be difficult for airlines to gear back up in less than a few months.

"Second, ticket prices remain high, with average air fares in December 160% higher than in 2019. That said, there has been a downward trend since June, when quarantine was reduced from three weeks to seven days, and then to five days in November."

"Third, some destinations, including the U.S., the UK, India, Qatar, Canada, Australia and all 27 EU member countries now require a pre-flight COVID-19 test for Chinese visitors; and others, such as Japan, South Korea and Italy, will impose testing on arrival and quarantine for those who test positive.

"Finally, a bottleneck processing passport renewals and visa applications is likely; and some countries, such as South Korea and Japan, are restricting short-term visas for Chinese travelers until the end of this month. Right now, we expect the Chinese outbound market will pick up strongly in Q2 2023, when airlines schedule capacity for the spring and summer, which include the May holiday, Dragon Boat festival in June and summer holidays."

THE AMERICAS

Travelers, travel Industry big winners in Omnibus Travel and Tourism Act

The historic **Omnibus Travel and Tourism Act** that was approved by the U.S. Senate at the end of December elevates the importance of the travel sector in the United States. For the first time in U.S. history, the Act creates a new **Assistant Secretary of Travel and Tourism** at the U.S. Department of Commerce, a top government-level position.

"This is a tremendous win for travelers, the travel industry and America's economy," commented **Geoff Freeman**, CEO of the U.S. Travel Association.

"The idea to create a presidentially appointed, U.S. Senate-confirmed position to lead federal travel policy has been around for decades. Thanks to a bipartisan and bicameral group of congressional leaders, the United States will now join all G20 countries with a senior federal official focused on travel."

The new Assistant Secretary of Travel and Tourism will play an important role by increasing the flow of international visitors by partnering with the government to lower visitor visa wait times, modernize security screening and leverage new technologies to make travel more seamless and secure.

Caribbean warned to prepare for new competition

As the Caribbean tourism industry celebrates the recent gains from the U.S. travel market, stakeholders are being warned that competition is on the horizon and much planning is necessary to sustain the momentum the region has been enjoying, writes Marketplace Excellence's Caribbean Tourism Authority newsletter this week.

Quoting **ForwardKeys**, the think piece notes that following strong U.S. arrivals performance over the past couple of years, "Caribbean destinations need to rethink their U.S. strategy now that they are facing tougher competition."

"The U.S. as an outbound source market is currently the world's travel recovery powerhouse, with a high number of travelers keen to explore and spend their hard-earned cash on new experiences," says ForwardKeys, cautioning that "destinations that have depended on this audience in the past now face more global competition and cannot rely on a generic approach."

Caribbean hotspots such as Cancún, Punta Cana, Montego Bay, and San José del Cabo, have managed to increase their interna-

tional arrivals compared with the 2019 benchmark year – even with tough competition from European destinations.

But U.S. travelers have a strong appetite for global travel, says the CTA, and are willing to take long-haul flights to get to there.

As reported in this issue of *TMI*, ForwardKeys says that Europe is fast approaching full recovery, largely thanks to the U.S. lifting its ban on European visitors in November 2021, which normalized bilateral traveler flows.

Favorable U.S. dollar-Euro conversion rates are driving demand for travel to Europe. ForwardKeys opines that exchange rates have become key to the decision-making process as travelers consider the cost of airfares, accommodations and activities as well as concerns around inflation and recession.

Turkey, Greece, Portugal and Spain have scored big among travelers this past summer, while ForwardKeys data shows increasing interest among U.S. travelers in visiting locales such as Switzerland, Ireland, and Iceland. The outlook for the Asia-Pacific region, while not without its challenges, is also promising.

Tito González joins the Duty Free Global team as VP of Americas



Duty Free Global has appointed Tito González as Vice President Americas, effective January 1, 2023.

Based in Panama, Gonzalez is a well-respected executive with more than 20 years in the Wine & Spirits industry, who has held international management positions

for Cruzan Ltd., V&S Absolut Spirits, Groupe Belvédère, Waldemar Behn GmbH, and was a Category Director for Grupo Wisa for the Travel Retail channel of the business.

His experience extends to all segments of the business, from the end consumer in local markets, to the Travel Retail channel at airports, borders, and cruise lines. He brings a brandowner's approach to business, and a deep understanding of the Travel Retail channel.

González commented, "This is just an incredible team to work with. We all come from different backgrounds and cultures but share the same objective; to build brands. America plays a big role in our global business and Latin America and the Caribbean are full of opportunities and areas to conquer."

Barry Geoghegan, Founder of Duty Free Global said of Tito's appointment, "I have known Tito for many, many years. I have huge respect for his passion for the channel and his incredible product knowledge in the wine and spirits business. We are delighted to make such a senior appointment in the region as the Americas is a big priority for DFG and its brand partners."

Tito will be attending the forthcoming Summit of the Americas in Palm Beach from April 17-19, along with the rest of the Duty Free Global team, including Geoghegan, Vice President of Sales John Kilmartin, and Regional Manager-North America Michael Pasternak, and is looking forward to meeting brand partners and operators.



Dany Nasr

URW names new CEO of Airports division

Unibail-Rodamco-Westfield ("URW") has named Dany Nasr as CEO URW Airports, where he will lead the continued growth of URW's portfolio of airport and transit retail programs.

Nasr joins URW Airports as it begins its role as the exclusive commercial developer and manager for the landmark new \$9.5 billion Terminal One at John F. Kennedy International Airport, while also continuing to work with clients and partners to launch innovative projects and collaborations at Los Angeles International Airport, Chicago O'Hare International Airport and Westfield World Trade Center in New York City.

Prior to joining URW, most recently Nasr was an operating partner at CDPQ supporting their large infrastructure transport investments. He previously served as CEO North America at Swissport, the world's largest provider of cargo and ground services in the aviation industry where he also was CEO and Senior Vice President Europe, and CFO Americas and Asia. Nasr also worked for PricewaterhouseCoopers in Montreal and Zurich.

Veronica Huber joins Waldemar Behn as Americas Sales Director



Veronica Huber joins Waldemar Behn

Veronica Huber has joined German spirits company Waldemar Behn as Sales Director Americas, effective Jan. 1, 2023.

In this new position, Huber will be responsible for Waldemar Behn's travel retail flagship Danzka Vodka, along with the Family Brands Alliance portfolio, which along with Danzka Vodka includes Pallini Limoncello (Pallini), Bache-Gabrielsen Cognac (Maison Bache-Gabrielsen), and G'Vine Gin and Talbert Celtic Malt Whisky (both from Maison Villevert).

All of these brands are managed by Waldemar Behn in travel retail.

Huber has diverse, extensive experience in travel retail in the Americas. Since starting in the channel in 1997, she has worked with such well-known companies as Diageo, Cartier, Longines (The Swatch Group) and Chase International, among others.

"We are delighted to welcome Veronica to the Waldemar Behn family. Between her impressive background and her dedication, we look forward to growing all of the Family Brands Alliance business as travel retail rebounds in this market," commented Philippe Biais, Export Director, Waldemar Behn.

Huber will be showing the full Family Brands Alliance portfolio at the Summit of the Americas, including Talbert Celtic Malt Whisky, the newest addition, which was presented in Cannes 2022 and will debut in this market at the Summit of the Americas, Booth #121.

For more information, Huber can be reached at 561-758-8398 or email: veronica@huberbrands.com



UNIBAIL-RODAMCO-WESTFIELD



Denz Van Der List returns to Global TR as VP of Sales for Go Travel

Go Travel has announced the appointment of Denz Van Der List as the company's new VP of Sales, effective Jan. 3, 2023.

Van Der List joins Go Travel in the newly created position, which will see the Miami-based travel retail sales specialist focus on expanding Go Travel's presence in the U.S. as well as key global markets.

The appointment is part of the company's strategy to push a more global presence in travel retail.

"I am excited to start a new journey in this position. Go Travel is a great brand and I am looking forward to being a part of the global team," said Van Der List.

Further to a recent period as

North America Commercial Director for Gate Gourmet, Van Der List will be returning to global travel retail. He has spent the last decade working in the travel retail industry including sales positions with travel accessories brands Cabeau and CabinZero.

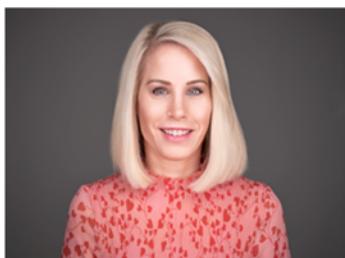
"We are delighted to be working with Denz as the company ramps up its global distribution; both domestic and international travelers are our targets in 2023," said Glenn Rogers, Vice Chairman of Go Travel.

Go Travel's appointment comes as the company is aggressively targeting growth in Asia, Middle East and continuing to expand in the Americas.



Denz Van Der List

Victorinox reorganizes, combines TR & Global Fragrance Sales under Gloria Dix



Gloria Dix



Thomas Bodenmann

Victorinox has merged its Global Travel Retail and Global Fragrances Sales businesses and appointed **Gloria Dix** to take over the leadership for both business units.

Dix, who has headed up Victorinox' Global Fragrance Sales for the past four years, will oversee the strategic direction of the company's Travel Retail & Fragrances business globally.

The reorganization is part of the company's plans to strengthen both business units, with a view to delivering on mid- to long-term growth objectives.

"We will join forces for both businesses to leverage synergies and create one strong, integrated business unit, as a foundation for future profitable growth," says **Thomas Bodenmann**, Head of Global Channels at Victorinox.

"Gloria joined the company 4.5 years ago and showed excellent performance re-building our Fragrances Sales business. She has played a key role in our recent category relaunch and is successfully driving our Fragrances strategy forward."

Prior to her appointment, Gloria worked as a representative in Travel Retail for well-known international companies in the luxury cosmetics industry, in fashion and fragrances. She joined Victorinox in 2018, taking over the Global Fragrances Sales business.

"I am absolutely delighted to receive this opportunity during a pivotal moment for travel retail. Victorinox has ambitious growth plans this year, buoyed by the opportunity and scope of a changed and enlivened travel industry, but fully conscious of the prevailing

challenges. There is much we want to achieve as a team over the coming period and it is an exciting time for everyone, with our strongest ever multi-category portfolio the foundation stone for our ambition and strategy. We are looking forward to engaging the Fragrances & Travel Retail community under one umbrella in 2023 and beyond," Gloria Dix explains.

Regional teams

To further leverage regional business opportunities, Victorinox will strengthen its regional presence with dedicated teams for Travel Retail & Fragrances Sales under the leadership of Gloria Dix.

As part of this restructuring, **Marcos Zobel** gains additional responsibilities for the entire Americas region, **Florent Breton** will now oversee the EMEA region and **Vivian Wong** will join Victorinox as of February 1, 2023 in the role of Senior Regional Manager Travel Retail & Fragrance Asia Pacific.

Victorinox's restructured team will be meeting business partners at TFWA Asia Pacific Exhibition & Conference, taking place in Singapore in May 2023.

ELC appoints Matthieu Cheyrou and Tracy Xu to new roles and the TR Leadership Team

The Estée Lauder Companies has announced two updates to the Travel Retail Leadership Team (TRLT).



Matthieu Cheyrou has been named VP/General Manager, Clinique, Travel Retail Worldwide (TRWW). He will report directly to **Israel Assa**, Global President, Travel Retail with a matrix reporting line to **Bart Sayer**, Global SVP/General Manager, International, Clinique.

Tracy Xu has been appointed VP/General Manager, Origins, Aveda and Lab Series, Travel Retail Worldwide (TRWW). She reports directly to Assa with matrix reporting lines to **Michael Marcano**, VP/General Manager, International, Origins; **Amanda Le Roux**, SVP, International, Aveda; and **Edouard Marchand**, Executive Director, International, Darphin Paris and Lab Series.

Both Cheyrou and Xu will join the Travel Retail Leadership Team.

Cheyrou previously served as Vice President of Marketing, Estée Lauder, TRWW where he reinforced brand leadership in the channel by designing consumer-centric brand building activations around key shopping moments and new product launches.

In her new role, XU will accelerate distribution, channel, and consumer engagement, fueling brand equity and maximizing sales and profit growth within this essential global channel for the three brands.

Most recently, she served as Executive Director, Marketing, Bobbi Brown, TRWW.

Their successors will be announced at a later date.