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TFWA
daily

TUESDAY 9 MAY 2023



George Yeo, Minister for Foreign Affairs (2004-2011), Singapore

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Tonight & tomorrow at
the Marina Bay Sands

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Free WiFi service

A complimentary WiFi service (MICE-HOTSPOTS) is offered throughout the conference venue and the exhibition halls.

WiTR+ meeting today

WiTR+ invites members and friends to meet today, from 17:30, in the TFWA Asia Pacific Lounge (Level 4, Marina Bay Sands Expo & Convention Centre). Celebrated actor, producer, writer, humanitarian and stand-up comedian Maitreyi Karanth will be joining for the first half-hour, before leaving for a gig the same evening. Maitreyi is founder of KOMA KARANTH FOUNDATION – the WiTR+ charity for 2023.



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03
Tuesday
9 May 2023
TFWA DAILY

TFWA Asia Pacific Lounge

The TFWA Asia Pacific Lounge opened yesterday, located on Level 4 of the Marina Bay Sands Expo & Convention Centre. It is open today and tomorrow from 18:00 to 21:00, with a special live music performance tomorrow evening.



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Asia Pacific at the crossroads

The keynote speaker in yesterday's TFWA Asia Pacific Conference was one of Singapore's most respected statesmen and business leaders – the country's former Foreign Minister George Yeo.

Asia Pacific is at a crossroads. Against a backdrop of geopolitical competition and a global economic slowdown, the region is facing near-term challenges that will define the business environment over the coming years. The opening session of yesterday's TFWA Asia Pacific Conference explored issues including intra-regional trade, relations between the major economic powers, the role and influence of China, and the importance of travel & tourism to the region, courtesy of keynote speaker George Yeo, Minister for Foreign Affairs (2004-2011), Singapore.

"We are in a great transition to a multipolar world," said Yeo. "Although China's economy will overtake that of the US' before

mid-century, China will not replace the US as global leader. It is not how China sees itself. The US may still be first among equals."

Commenting on the near-term challenges facing the region, he explained that the risk of another global financial crisis has gone up. "The fight against inflation has been paused in order to stabilise the financial system. Parts of the world may go into stagflation."

Yeo addressed intra-regional trade and its importance in terms of the post-pandemic recovery, highlighting that trade has become politicised as a result of US-China tension and the Ukraine War. "The US is determined to decouple at the high-end of technology, but trade overall continues to grow. China is seeing a sharp post-pandemic rebound. China and India will account for half of global growth this year."

On the subject of the evolution of relations between the major economic powers, Yeo believes US-China relations are not likely to get worse in the short-term because of the Ukraine War. "War over Taiwan will only happen if the US wants it," he said. "This is not likely as the US may not prevail in a conventional war with China."

The role and influence of China was another key theme of Yeo's fascinating address. "China will continue to grow and become a powerful country, but its instincts are not aggressive," he commented. "If anything, it will continue to build walls around itself to preserve its internal homogeneity and unity. It will make use of access to its domestic market to manage external relations as it has done for centuries."

Yeo added that travel & tourism will be one of the most important growth sectors in the coming years. "In the short-term, there is the post-pandemic rebound. Longer term, the sector will benefit from growing middle classes in Asia."



George Yeo, Minister for Foreign Affairs (2004-2011), Singapore: "We are in a great transition to a multipolar world. Although China's economy will overtake that of the US' before mid-century, China will not replace the US as global leader. It is not how China sees itself. The US may still be first among equals."

“We have every reason to be optimistic about the current state and outlook for our industry in Asia Pacific”

Yesterday's conference was opened by TFWA President Erik Juul-Mortensen, who shared his thoughts on the outlook for Asia Pacific travel retail as international travel recommences and the market looks to the future.



TFWA President Erik Juul-Mortensen: “We have every reason to be optimistic about the current state and outlook for our industry in Asia Pacific. It may take a year or two, but I’m sure the region will regain its position as the global leader in sales to travellers, and we at TFWA are determined to play our part in the renaissance of Asia Pacific duty free and travel retail.”

TFWA President Erik Juul-Mortensen opened yesterday's conference, emphasising that duty free and travel retail is recovering, but the industry still faces significant economic and geopolitical headwinds.

“Our business is bouncing back, passenger traffic is growing, and travellers are shopping again,” said Juul-Mortensen. “Asia Pacific has been slower to recover than other regions, but the lifting in January of most travel restrictions for outbound Chinese citizens was a major boost. Early indications show that Asian destinations, such as Thailand, Japan and Korea, are benefiting first, with long-haul travel at scale likely to follow later.”

He highlighted four key reasons why patience is needed until passenger traffic returns in force. “Firstly, international airline seat capacity from China stood at just 45% of its 2019 level in the second quarter of this year, according to ForwardKeys. That's an improvement on 21% in Q1, but still a long way from full recovery. It will take time for airlines to repair their finances and gear up to meet growing passenger demand. Secondly, air fares are high, especially in long haul, and remain subject to volatility. Thirdly, health-related barriers to inbound travellers persist at some destinations. And fourthly, there is a limited list of countries authorised for Chinese group travel.”

The duty free and travel retail marketplace has changed since 2019, and so has traveller behaviour. Among Chinese outbound passengers, there is now a clear move towards direct flights versus gateways or hub airports. “Forwardkeys data from this year's first quarter shows 74% of bookings for international departures from China being direct flights, and only 26% destined for gateways,” said Juul-Mortensen.

Inevitably, creating a high-quality, customised retail experience requires investment. It's encouraging, therefore, to note what may be the start of another marketplace shift.

“The Minimum Annual Guarantee that has underpinned the airport concession system for decades is being replaced by a variable, passenger-based rent in the latest tender at Korea's Incheon International Airport,” Juul-Mortensen explained. “As we saw during the pandemic when several airports introduced concession fees linked to passenger numbers, our industry can only survive and thrive if the risks and rewards of engaging travellers at airports are more fairly shared between landlords and tenants.”

Another clearly discernible, recent trend highlighted by Juul-Mortensen is the determination of leading Asian travel retailers to expand outside their home markets.

He also commented on TFWA's support for the ‘Duty Free: Trusted, Transparent, Secure’ campaign against illicit trade, counterfeit and intellectual-property theft, which was launched last year in partnership with the Duty Free World Council (DFWC) and regional associations. “Another industry initiative we warmly support is the DFWC Academy, whose ‘Certificate in Duty Free and Travel Retail’ enables retail professionals to further develop their in-store skills,” said Juul-Mortensen. “Following strong interest from Asia Pacific, a Chinese-language version of the online course is being launched here this week, allowing students to enrol locally.”

Juul-Mortensen concluded by noting that traveller numbers are rising, the region's retailers are ambitious to expand, Hainan will continue to prosper, and potential powerhouses like India are coming to the fore. “We have every reason to be optimistic about the current state and outlook for our industry in Asia Pacific. It may take a year or two, but I'm sure the region will regain its position as the global leader in sales to travellers, and we at TFWA are determined to play our part in the renaissance of Asia Pacific duty free and travel retail.”

“We can finally plan for a full return in 2024 to the region’s long-term performance path”

In yesterday’s conference, Sunil Tuli, President, Asia Pacific Travel Retail Association (APTRA) updated delegates on the work being done on their behalf across the region.

“Here in Singapore we’re right at the heart of the region that will soon carry on where it left off in 2019 – the engine that drives the global growth of the travel retail industry,” said Tuli. “With the return of Chinese outbound traffic easing week on week, and tour groups starting to travel again to key destinations including New Zealand and Thailand – where China was the largest market before the pandemic – our prospects are strong for the rest of the year and we can finally plan for a full return in 2024 to the region’s long-term performance path.”

Tuli explained that, in APTRA’s 18-year history, it has never been busier on regulatory and advocacy issues, with 13 campaigns over the last 15 months.

“Last spring, APTRA shared in a wider travel and tourism industry approach to urge governments to consider open border solutions such as travel corridors and bilateral agreements to enable the resumption of international travel and the return to business for all impacted sectors, including travel retail,” he said.



Sunil Tuli, President, Asia Pacific Travel Retail Association (APTRA): “Here in Singapore we’re right at the heart of the region that will soon carry on where it left off in 2019 – the engine that drives the global growth of the travel retail industry.”

Looking more specifically at travel retail, in tobacco New Zealand’s government has a significant strategy aimed at a “generational end game” designed to ensure that no one born after 1 January 2009 will ever be able to legally purchase cigarettes in the country. “APTRA has responded by making representation to the government to ensure the unique aspects of travel retail are properly considered, especially regarding the allocation of retail licenses, which are set to be reduced by up to 90% across the country,” Tuli explained.

China Duty Free Group: “the Chinese market still presents tremendous opportunities”

China Duty Free Group (CDFG) is Diamond Sponsor of this year’s TFWA Asia Pacific Exhibition & Conference. In yesterday’s conference, Luke Chang, Executive Vice President, CDFG, highlighted that, despite the challenges, the Chinese market still presents tremendous opportunities.

“The International Monetary Fund’s report predicted that in 2023 China’s economic recovery of 5.2% will outpace global economic growth of 2.8%,” said Chang. “The World Tourism Organization (UNWTO) predicts strong demand for international travel, with worldwide tourist numbers reaching 80% to 95% of pre-pandemic levels. Within China, there were a total of 65 million inbound and outbound travellers in Q1, an increase of 116% compared to last year. We are particularly excited about the rapid recovery of traffic in Hainan. In Q1 of this year, Hainan welcomed 27 million tourists, an increase of 22.5% over last year and 22.1% higher than the same period in 2019. The total sales of offshore duty free shops in Hainan reached RMB 20.3 billion in Q1, growing by 29% compared to last year.”

Over the past three years, CDFG has made a lot of efforts to adapt to the changes. “Our top priority is to maintain a continuous connection with our customers,” Chang explained. “One of our goals is to transform our store spaces into destinations that will inspire and delight our customers. For online, we have established a pre-order platform in preparation for post-pandemic new retail business and we have launched online platforms such as the ‘CDF Membership Platform’.”



Luke Chang, Executive Vice President, China Duty Free Group (CDFG): “We are particularly excited about the rapid recovery of traffic in Hainan. In Q1 of this year, Hainan welcomed 27 million tourists, an increase of 22.5% over last year and 22.1% higher than the same period in 2019.”



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Preparing for growth

The 'Preparing for growth' session of yesterday's TFWA Asia Pacific Conference heard from a panel of regional industry leaders on how they are preparing their businesses for the recovery: Luke Chang, Executive Vice President, China Duty Free Group; Freda Cheung, President and CEO Asia Pacific, Dufry; Sue Kyung Lee, CEO, Global SK-II; Thabet Musleh, Vice President, Qatar Duty Free; and Marvin von Plato, CEO, Heinemann Asia Pacific.



The 'Preparing for growth' session of yesterday's TFWA Asia Pacific Conference featured Luke Chang, Executive Vice President, China Duty Free Group; Thabet Musleh, Vice President, Qatar Duty Free; Sue Kyung Lee, CEO, SK-II; Marvin von Plato, CEO, Heinemann Asia Pacific; and Freda Cheung, President and CEO Asia Pacific, Dufry. The session was moderated by John Rimmer, Managing Director, TFWA.

SK-II raising the bar "to be worth the weight of choice"

Sue Kyung Lee, CEO, SK-II, emphasised three key messages during the 'Preparing for growth' session of yesterday's TFWA Asia Pacific Conference.

"Firstly, consumers are at the heart of all that we do at SK-II," she said. "We believe in having the deepest understanding of our consumer and serving her better than anyone else. We are constantly listening and engaging with her on the social channels she's on and innovating to serve her better than anyone else."

Secondly, in the past year SK-II has conducted extensive research involving over a thousand female consumers. "The one thing that she kept talking to us about was how her life is changing," said Kyung Lee. "She has more choices, more freedom to choose especially post-pandemic when she starts to travel again. She loves choices but there is a consequence of these choices – and we call this 'the Weight of Choice'. She weighs all the variables of her choices to ensure that she's making the best

one, and has even higher expectations. This means that we need to raise the bar in everything we do as a brand with irresistible superiority to be worth the weight of her choice wherever she chooses to look or shop."

Lastly, travel retail continues to be an important channel for SK-II. "As a global leading prestige skincare brand with strong consumer interest and growth in our key domestic markets globally – 47% growth in Japan and 8% growth in China in the last quarter – we are encouraged that we will see sequential improvement in travel retail," Kyung Lee commented. "We are committed to partner with industry partners to elevate holistic value for our consumers in travel retail."

Dufry: "an opportunity to redefine the leadership position of Asia Pacific within travel retail"

Dufry recently joined forces with Autogrill and is present in 75 countries around the world. In terms of how the company sees Asia Pacific compared to the rest of the world, Freda Cheung, President and CEO Asia Pacific, Dufry, commented

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The 'Preparing for growth' session of yesterday's TFWA Asia Pacific Conference heard from a panel of regional industry leaders on how they are preparing their businesses for the recovery.

that when China reopened in January, "it brought a breath of fresh air after three years". "At the same time, while travel restrictions in the region are on par with the rest of the world, the recovery is not at the same pace," said Cheung. "It is a supply and demand issue. The region now has an opportunity to come together, reimagine and redefine the leadership position of Asia Pacific within travel retail. Together, we can revolutionise the whole travel experience, so we truly live up to the reputation of leadership in the travel retail industry."

Cheung also commented on Dufry's strategic partnership with Alibaba, emphasising that the two companies share a common vision on how to drive forward the travel experience. "The key is leveraging on the strengths of both companies," said Cheung. "Alibaba's strength is technology and innovation, while Dufry's strength is our network with more than 1,200 locations and over 5,000 outlets. We are working together to revolutionise the travel experience, increasing engagement and touchpoints."

China Duty Free Group: the demands of Chinese consumers have shown significant changes

Luke Chang, Executive Vice President, China Duty Free Group (CDFG), explained that 2022 was an extremely difficult year. However, CDFG is proud that it was able to retain all 16,808 of its employees and continue to invest in its long-term strategy.

"We opened the Haikou Xinhaigang Project in October last year and renovated our Haikou and Sanya airport stores," said Chang. "We also opened two Duty Zero stores in downtown Hong Kong."

In the post-pandemic era, the demands of Chinese consumers have shown significant changes. "First, more and more consumers tend to use convenient online shopping platforms," Chang explained. "Second, consumers are becoming more sensitive to prices, and their consumption concepts and behaviours are more pragmatic and rational. Third, consumers are no longer satisfied with simple 'purchasing' when they go shopping, but prefer high-value added, personalised, customised products."

Qatar Duty Free committed to enhancing customer experience

Thabet Musleh, Vice President, Qatar Duty Free (QDF), focused on QDF's position in the retail industry, future collaborations, and its commitment to enhancing the customer experience and catering to customers' demands.

"Qatar Duty Free was one of the few travel retailers that resumed business as usual, even during the pandemic's peak," said Musleh. "For Qatar Duty Free, it is about delivering a 5-star service for our customers at all times and under any circumstances. Our customers can ensure that we will continue offering the best products and services at all times."

QDF's customers have a significant influence on all its business decisions. "I believe our customers' shopping behaviours have stayed the same," Musleh explained. "However, we are committed to continuously delivering experiences that match their interests and demands by keeping our offer up-to-date and strongly appealing to various customer segments."

Heinemann Asia Pacific: "connection and experience key to engaging with the new consumer"

Marvin von Plato, CEO, Heinemann Asia Pacific, shared an insight into the work undertaken for the past three years to ensure it is ready to re-engage and excite customers once they could travel again, and Heinemann Asia Pacific's key focus areas to capture future opportunities.

"After nearly three years of social distancing and travel restrictions, we have all gained a greater appreciation for connection and experience, which we believe is the key to engaging with the new consumer," said von Plato. "Creating 'unforgettable experiences' is one of the key pillars of the Heinemann value proposition, and is one that we believe resonates strongly with travellers." He added: "We need a more equitable partnership in the travel retail business model, as we've learned during the course of the pandemic. This is key to continued investment into the business and to innovating constantly with new concepts, product categories and technologies."

Korea's No. 1 Consumer Health Brand, CheongKwanJang brings a new dynamic to the Travel Retail market

CheongKwanJang leads healthy wave as a first mover of wellness category creator



Source: Euromonitor International Limited; Consumer Health category; % retail value share, 2019-2021 data, CH2022 edition

Resilience is the keyword for the global duty-free market in 2023. Even though Covid-19 has impacted all sectors, CheongKwanJang (CKJ) has always been a main player in Wellness category in travel retail industry. Despite the global economic difficulties, CKJ achieved 17% of growth comparing 2019. This performance was possible because CKJ always has been a leader in the herbal category even in the moment when the demand for self-healing, immune system is higher than ever. In spite of global economic recession, CKJ has expanded into European markets such as UK, Germany, and Middle East markets such as UAE, Qatar. KGC opened Ginseng Museum Café in Manhattan's 5th Avenue, largest shopping

district in the US. In addition, KGC has demonstrated its resilience in the duty-free market by partnering with major operators such as DFS, Lotte and Dufry in Vietnam, Jordan, etc. Now, CKJ welcomes partners who are willing to ride the growth wave beyond resilience.



CheongKwanJang, a resilient brand over a century never stops innovating

CKJ, Korea's No.1 supplement brand is, at the same time, the world's No.1 ginseng brand and has already resumed operations in 32 stores in Japan, Hong Kong, etc., including shop-in-shop (SIS) stores in Osaka, Jakarta, Danang, Nha Trang and other locations. While expanding stores, CKJ is continuously improving their product quality.

The leading brand has been at the forefront of product innovation through the development of various formulations that are based on ginseng root, extract, as well as mega hit products with 100-year-old heritages. Good Base, second brand based on superfoods such as pomegranate, aronia, targeting your customers has grown into a popular brand in China. CKJ releases KRG Root Dragon Edition, Vital tonic booster combining vitamin tablet and red ginseng ampoules, in response to the changing market demands. CKJ will continue to evolve and thrive as a wellness category creator in the duty-free industry.



▲ Lotte Danang tax free shop ▲ Boutique Store at Incheon International Airport ▲ Ginseng Museum Café in Manhattan, NYC



▲ Red Ginseng&Pomegranate Royal, Vicens, Everytime Royal, Vital Tonic Booster

CKJ presents a new trend in herbal supplement in TFWA APEC

CKJ is attending TFWA AP Singapore for first time in four years after the pandemic. The booth is based on the pattern of "Hanok", a traditional Korean house, with gold and black tone. At the same time, the concept of nature provides comfortable atmosphere for visitors. CKJ is one of the main sponsors that has consistently supported TFWA networking events. This year is no exception. CKJ offers drinks combining superfoods such as red Ginseng ampoules, pomegranate and Aronia, and hopes attendees will enjoy networking in the hot Singapore night with the fresh energizing drink.



▲ TFWA Chill-out party sponsored by CheongKwanJang



▲ CheongKwanJang brand booth in 2023 TFWA APEC (B2 - E2)

Asia Pacific travel outlook

To give a forecast of what is on the horizon, yesterday's 'Asia Pacific travel outlook' session heard from ACI Asia Pacific Director General Stefano Baronci, and OAG Aviation Head of Asia and PATA Executive Board Member Mayur Patel on the region's travel outlook with an eye on emerging destinations, the preferences of younger travellers, and the future of post-Covid travel.

ACI Asia-Pacific: "new opportunities for growth and expansion in the region"

In the 'Asia Pacific travel outlook' session of yesterday's conference, Stefano Baronci, Director General, Airports Council International Asia-Pacific, highlighted that the region has been the biggest civil aviation market in the world, with four Asian countries among the world's top ten.

"However, the pandemic-related restrictions in some key markets of Asia saw our region drop its dominating market share," said Baronci. "We see this as a temporary setback and with China reopening, we will soon see our region regain its top status."

His presentation covered the traffic recovery trends, evolution of non-aeronautical revenues, strategies and initiatives to improve and future-proof airports' commercial revenue streams and post-pandemic travel.

Baronci explained that there are several emerging destinations in Asia-Pacific and the Middle East with significant commercial potential that brands, retailers, and other travel retail stakeholders should be aware of, including Vietnam, Indonesia, Philippines, and Oman. "By keeping an eye on these emerging destinations with significant commercial potential, travel retail stakeholders can identify new opportunities for growth and expansion in the region," Baronci commented. "Whether it is through partnerships with local brands or the development of new products and services tailored to the needs of these markets, brands, retailers, and other travel retail stakeholders can position themselves for success in the growing travel market."



Stefano Baronci, Director General, Airports Council International Asia-Pacific: "Whether it is through partnerships with local brands or the development of new products and services tailored to the needs of these markets, brands, retailers, and other travel retail stakeholders can position themselves for success in the growing travel market."



Mayur Patel, Head of Asia, OAG Aviation and Executive Board Member, Pacific Asia Travel Association (PATA): "Pent-up demand will continue to hold over the next 12 months as consumers look for new experiences, and short breaks to regional Asia Pacific destinations will continue to attract traffic from demographic segments."

"Pent-up demand will continue to hold over the next 12 months as consumers look for new experiences"

Mayur Patel, Head of Asia, OAG Aviation and Executive Board Member, Pacific Asia Travel Association (PATA), explained that current schedules show a 93% global recovery to pre-pandemic 2019 levels with Asia Pacific remaining slightly below the global performance. "The structure of the regional market recoveries will be different, and Asia Pacific may be slightly later in recovering – May 2024 – but not by a significant time period," said Patel. "Pent-up demand will continue to hold over the next 12 months as consumers look for new experiences, and short breaks to regional Asia Pacific destinations will continue to attract traffic from demographic segments."

Looking at China, Patel highlighted that it is important to remember that, pre-pandemic, the vast majority of scheduled airline capacity (88%) from China was operated in the domestic market. "This is significant, but it also paves the way for international opportunities that we had seen pre-pandemic."

Patel added that, as Asia Pacific carriers continue developing their dual-brand strategy to segment travellers, there is greater focus on low-cost brand subsidiaries as they take advantage of the evolving pent-up demand in the leisure segment. "Regional traffic to destinations such as Indonesia (Bali), Vietnam, Thailand, South Korea and Japan will translate into a large surge in arrivals over the next nine months as traveller preferences for more personalised experiences and discovering new places will be top of their priority list."

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Capturing today's travelling consumer

The final session of yesterday's TFWA Asia Pacific Conference examined new emerging destinations, shopping preferences and the influence of social media in purchasing decisions.

"An increasing trend towards shoppers having more purposeful shopping intentions"

Stephen Hillam, Managing Director, Pi Insight, highlighted how current Asia Pacific shopper behaviour has adapted from its position back in 2019, and the key ways in which industry stakeholders can take advantage of new and emerging shopper dynamics.

"From our current shopper findings, we are seeing an increasing trend towards shoppers having more purposeful shopping intentions, as well as a strengthening interest in the core values of our channel, such as the value proposition, gift purchasing, self-treating and product differentiation," said Hillam. "Therefore, if industry stakeholders focus on and increasingly emphasise our channel's core differentiators and selling points, while also still providing the retail theatre shoppers demand, the industry will certainly be in a very strong position to meet the needs and expectations of the post-Covid traveller and shopper in Asia Pacific."

In addition to the Global Shopper Series, Pi Insight also conducted a bespoke study for the TFWA Asia Pacific Conference, with interviews across 500 Chinese travellers who have plans to travel internationally within the next six months and intend to visit an airport duty free store during their trip. As Chinese shoppers continue to return, Hillam explained that key shopping drivers include "to treat themselves, to look for a gift, to look for souvenirs, to look for new items and to look for duty free exclusives, all of which are existing core pillars of our industry".



Stephen Hillam, Managing Director, Pi Insight: "From our current shopper findings, we are seeing an increasing trend towards shoppers having more purposeful shopping intentions, as well as a strengthening interest in the core values of our channel, such as the value proposition, gift purchasing, self-treating and product differentiation."

Keeping travellers engaged at every touchpoint

Kaatje Noens, Global Travel Retail Executive Vice President, Puig, described how travel has changed post-pandemic, largely due to younger generations embracing travel, especially across Asia Pacific.

Additionally, Noens pointed out that Puig has identified that today's consumers "are informed" and "they want to feel unique" as they travel and experience the world. Essentially, "they want to discover something different and they want a thrill and a new experience".

For Puig, it is clear that the company has developed to make adjustments to offer its brands a much more targeted and interactive technologically-advanced marketing thrust, using social media and apps to engage with consumers, even prior to setting off on their journey.

"Before they even start travelling, you can have opportunities – like live-streaming," said Noens, highlighting that the business works hard to keep them engaged and delighted along the way so that at every touchpoint their experience is a good one.



Kaatje Noens, Global Travel Retail Executive Vice President, explained how Puig works hard to keep next-generation travellers engaged at every touchpoint.



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“The influence of digital touchpoints while travelling has become critical”

Rocky Chi, Head of Planning, Emerging Communications, focused on ‘Capturing today’s Chinese travellers’ with the major return of outbound tourists to global destinations. “Chinese travellers have changed their perceptions, behaviours and expectations,” said Chi. “Brands need to be aware of these changes and take steps to get ready for the new landscape being unveiled.”

Chi emphasised the influence of social media and digital marketing in terms of influencing purchasing decisions. “Years ago, when we talked about the role of social media and digital marketing in influencing travel shopping decisions, it was mainly in the pre-departure stage,” she explained. “With the lightning speed rise of the ‘shopping bible app’ Little Red Book (RED*) in China, this has become invaluable to Chinese travellers, using it as a search engine 24/7 to get guides, reviews, product usage tips, pricing comparisons, do’s and don’ts, as well as being an active content generator while on-the-go. So, the influence of digital touchpoints, especially social media, while travelling has become critical.”

To engage with the savvy Chinese travelling consumers of today, Chi added that brands and retailers need to:

- “Seed your brand through key-opinion-customers, as well as Chinese expat influencers who are living in the local area. Their perspectives play an important role in influencing mass travellers’ decisions.”
- “Use real-time, location-based, targeted ads to capture Chinese travellers while they are in the destination through mainstream apps widely adopted by Chinese users.”
- “Utilise digital techniques to facilitate the shopping journey.”
- “Remember that onsite livestreaming has become a must rather than nice-to-have, and creativity is the key to success.”
- “Adopt AR/VR technology to attract and engage with Chinese shoppers.”



Rocky Chi, Head of Planning, Emerging Communications: “Seed your brand through key-opinion-customers, as well as Chinese expat influencers who are living in the local area. Their perspectives play an important role in influencing mass travellers’ decisions.”

Confectionery: a category to build on

Marc Hudson, Global Sales Director, Mars International Travel Retail, reminded that Mars Wrigley is “one of the leading international suppliers in the confectionery category within the region”. However, there is definitely room for growth. Mars and confectionery consumers in Europe are buying up to 12 to 13 times more than they are in travel retail in China. “There’s clearly a huge untapped opportunity in China,” said Hudson. “Confectionery is less important in that part of the world, so there’s little space allocated to it, which leads to a small portfolio. The customer is not inspired, we’re not giving them the experience they demand and they don’t buy.”

In confectionery, 70% of the growth comes from growing the category and not by focusing on the brands themselves. The key point for Hudson is to make sure “we help the consumer navigate the category”.



Marc Hudson, Global Sales Director, Mars International Travel Retail: “There’s clearly a huge untapped opportunity in China.”

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Welcome Coffee:



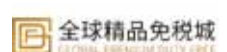
Morning Coffee:



Lunch:



Afternoon Networking Session:



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APTRA Exchange

Yesterday's APTRA Exchange seminar provided a future-forward perspective of the opportunities ahead in Asia Pacific.

Asia Pacific remains a bright spot in the global economy

To kick off the APTRA Exchange, Economist Intelligence Unit Global Chief Economist Simon Baptist provided insights on the most pressing issues and what they mean to businesses in Asia.

"The outlook has brightened," said Baptist. "Europe's winter energy crunch did not really come and China exited zero-Covid earlier than expected. The US economy has also so far proved resilient to inflation and higher interest rates. And we do think that inflation has now peaked in most economies. But I wouldn't get too carried away. Higher rates will inevitably still drag on output, and we have the ongoing effects of the war in Ukraine. Our forecast for global growth this year stands currently at 2.1%, up from 1.7% at the beginning of the year, but this is still far from being a strong performance for the global economy."

Financing costs have moved to a higher level and are very unlikely to return to what we saw in the 2010s. "Adjusting to this will be difficult for governments, households and companies," Baptist explained. "In Asia, look at the distribution of economy-wide debt to have a sense of where the difficulties will lie. Australia and South Korea have highly indebted households for example; for several frontier markets, like Pakistan, the difficulties are going to

lie in government debt repayment. Indonesia and India stand out as large, emerging markets with relatively low debt loads that should be able to adjust relatively well."

The session also explored the sustainability of growth triggered by the reopening of the China market, and how the policy priorities from the recent 'Two Sessions' meetings will play out. "What we're seeing in China at the moment is a release of some of the pent-up demand built up over the pandemic," said Baptist. "This still has some way to run. For example, we're yet to see the return of Chinese overseas tourists in a meaningful way, owing to issues around flight and visa/passport availability. We've recently moved our GDP forecast for China to 6.1% for 2023, far above the government's target. While we're getting a cyclical pick-up, our long-term view remains that China's growth is slowing structurally. Demographics are of course a challenge, but the drift in policy towards a more state-driven, centrally-ran economy is also a drag on productivity."

Asia Pacific remains a bright spot in the global economy. Growth in the region will trend at a higher rate than any other region. Baptist commented that, in general, politics is relatively stable and policy conducive to growth. "The big risk for APAC in the future lies around how the region manages its geopolitical tensions and territorial disputes. These flashpoints have the potential to unwind a lot of the developmental progress we've seen in recent years."



Simon Baptist, Global Chief Economist, The Economist Intelligence Unit: "What we're seeing in China at the moment is a release of some of the pent-up demand built up over the pandemic. This still has some way to run. For example, we're yet to see the return of Chinese overseas tourists in a meaningful way, owing to issues around flight and visa/passport availability."

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Travellers are back, but the profiles are different

In the second session of APTRA Exchange, delegates heard from leading travel research agency ForwardKeys' Vice President of Brands, Retailers and Media Marina Giuliano on the latest travel forecasts in the region.

Giuliano key messages were structured around a few topics:

- "International travel is expected to go back to 'normal' in 2023 in many regions worldwide, with some destinations now switching to growth mode."
- "Travellers are back. However, the profiles are different,



regarding nationalities, travel destinations or profiles. A proper understanding of the impact of external factors, like capacity, helps to disregard wishful thinking and have a more realistic vision of the new market stakes."

- "Business travel is still active and following similar pace of recovery as leisure travel."
- "Premium travel is still driving the recovery."
- "Reactivation of international travel from China and key destinations, both domestic and international, that will benefit from this development."
- "Importance of hubs connecting Chinese travellers with rest of the world as direct connectivity still remains limited – special focus on Singapore, Seoul and Hong Kong."

The session included insights into ForwardKeys' research produced for APTRA members and what it demonstrates about the recovery of travel in the Asia Pacific region. "First, we have observed a trend in the initial stages of reopening where premium cabin classes are recovering at a faster pace than economy class," Giuliano explained. "Second, sun and sea destinations in Asia Pacific are becoming increasingly favoured. Third, both leisure and business travel are experiencing a consistent rebound, with business travel expected to eventually catch-up with leisure travel. Fourth, people now tend to book flight tickets closer to the travel dates."

Marina Giuliano, Vice President of Brands, Retailers and Media, ForwardKeys: "Travellers are back. However, the profiles are different, regarding nationalities, travel destinations or profiles. A proper understanding of the impact of external factors, like capacity, helps to disregard wishful thinking and have a more realistic vision of the new market stakes."

The benefits of an anonymised Index for the Asia Pacific region

APTRA Exchange heard from Stephen Hillam, Managing Director, Pi Insight, who introduced the 'APTRA Index' initiative. The new initiative would be to develop a sales index for the Asia region in association with regional retailer organisations, in order to allow APTRA members to track and monitor the performance of the Asia Pacific airport duty free sector.

"There are numerous benefits of having an anonymised Index developed for the Asia Pacific region, particularly with the current position of the industry following the Covid-19 pandemic," Hillam explained. "For example, an anonymised Index would allow APTRA members to monitor the overall performance of the regional industry and also track key trends across areas including spend per passenger, the relationship between value sales and PAX, and seasonality. In addition, an anonymised Index would allow regional stakeholders to identify when the Asia Pacific region has reached its point of recovery following the Covid-19 pandemic. Furthermore, this would all be achieved without ever identifying or providing any retailer, country or sub-regional information, therefore ensuring absolute anonymity of all participating retailer organisations involved."

Hillam added that the methodology and scope behind the APTRA Index is still being finalised, as it will be heavily dependent on the participation of retailer organisations within the region. "From a preliminary standpoint though, the intended methodology would be based on direct retailer participation and the initial target scope would be to provide the Index for the Asia Pacific region (inclusive of the Indian subcontinent)."



Stephen Hillam, Managing Director, Pi Insight: "There are numerous benefits of having an anonymised Index developed for the Asia Pacific region. For example, an anonymised Index would allow APTRA members to monitor the overall performance of the regional industry and also track key trends across areas including spend per passenger, the relationship between value sales and PAX, and seasonality."

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China Duty Free Group's continuous connection with its customers

China Duty Free Group (CDFG) is Diamond Sponsor of TFWA Asia Pacific Exhibition & Conference. Luke Chang, Executive Vice President, CDFG, shared some thoughts with Ross Falconer.

China Duty Free Group's top priority is to maintain a continuous connection with its customers. "One of our goals is to transform our store spaces into destinations that will inspire and delight our customers," explains Luke Chang, Executive Vice President, China Duty Free Group (CDFG).

For online, CDFG has established a pre-order platform in preparation for post-pandemic new retail business and has launched online platforms such as the 'CDF Membership Platform'. "We always believe that digital technology online should be combined with offline stores," says Chang. "Consumers can touch, smell, taste, and try on different products in the shops, and can also communicate and interact with a sales consultant. However, before, during, and after the consumer's trip, we can use the power of new retail to maintain communication with consumers online. China is leading the trend of the digital world in the retail industry, with live streaming, VR technology, online platforms, and extra, allowing brands and operators to reach a wider range of consumers beyond the scope of offline stores."

CDFG will continue to improve its existing platforms, while strengthening the synergy and integration of the platforms. "Based on our membership system and big data resources, we will provide more data value-added services to vendors, help consumers make better choices and drive sales," Chang adds. "We believe that the offline experience is fundamental and irreplaceable for the retail industry. We hope to work closely with our partners to create greater value and open a new chapter in the travel retail industry together."



▲
Luke Chang, Executive Vice President, China Duty Free Group: "We believe that the offline experience is fundamental and irreplaceable for the retail industry. We hope to work closely with our partners to create greater value and open a new chapter in the travel retail industry together."

Qatar Duty Free accomplishes impressive growth in retail revenue

Qatar Duty Free is Main Partner of the TFWA Asia Pacific Lounge. Ahead of the event, Thabet Musleh, Vice President, Qatar Duty Free, spoke to Ross Falconer.



Thabet Musleh, Vice President, Qatar Duty Free: "Our priorities remain the same. At Qatar Duty Free, we will continue to grow the business, deliver excellent services and be the launchpad for world-firsts and exclusive products and brands in travel retail."

Qatar Duty Free (QDF) is very optimistic with the sales performance this year and very proud of the numbers it achieved the previous year. "We have accomplished impressive growth in retail revenue in the last financial year, which is a testament to QDF's success not only during the FIFA World Cup period, but throughout the year," says Thabet Musleh, Vice President, Qatar Duty Free. "Our exceptional revenue growth was also supported by the launch of the retail offer at the brand-new airport expansion. However, it does not stop there. The best is yet to come."

QDF is committed to maintaining its long-term partnership with TFWA. "Our objectives at TFWA Asia Pacific Exhibition & Conference this year are to ensure that we meet with our brand partners and colleagues, whom we haven't met face-to-face in a long time, and participate in valuable conversations," Musleh explains. "We look forward to also learning more about the current state and the latest in the travel retail industry in Asia Pacific. We aim to engage with our partners to keep the industry alive and at the forefront."

The QDF retail offer and business model are all about evolution. This relies on always ensuring it is ahead of the game and delivering what customers desire when shopping at an airport. "We are keen to continue providing exclusive and world-first products, stores, and services," Musleh comments. "This is what makes us unique amongst our competitors."

The brand-new retail offer at the extraordinary Hamad International Airport expansion project was unveiled just in time for the 2022 FIFA World Cup. QDF partnered with the airport to introduce a magnificent new terminal, featuring over 65 revolutionary retail experiences and 20 cafes and F&B outlets in one vast shopping area surrounded by the airport 'Orchard'. "The new terminal includes a line-up of world-renowned names in the retail industry and many world and regional firsts, including the world's only FIFA shop, the first airport Fendi Café, the first TimeVallée boutique in the Middle East, and the first Ralph's Coffee Shop in an airport," Musleh adds. "Our priorities remain the same. At Qatar Duty Free, we will continue to grow the business, deliver excellent services and be the launchpad for world-firsts and exclusive products and brands in travel retail."

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International Beverage unveils Old Pulteney 13 Years Old

International Beverage is expanding its global travel retail portfolio with the launch of an exclusive new expression: Old Pulteney 13 Years Old. Bottled at 43% ABV, the distinctive single malt will form part of Old Pulteney's current travel retail line-up, which includes Old Pulteney 10 Years Old and 16 Years Old.

Initially matured in American oak casks, the whisky has been finished in Spanish oak casks, giving complex flavours of coconut, citrus, rich vanilla custard and candied almonds.

Boasting a medium to long lasting finish, the influence of coastal air from Pulteney Distillery's coastal home in the far North of Scotland, combines with a toffee aroma to give the liquid a delicious, salted caramel flavour.

 **Basement 2/2-H9**



Maestrani showcases newly-created Munz Travel Line



Maestrani Swiss chocolate company is launching a new exclusive travel retail highlight at TFWA Asia Pacific Exhibition & Conference. The newly-created Munz Travel Line, with its cute concept design and delicious Swiss milk chocolate bites, will bring lots of happiness to your family and friends.

The iconic Munz Kids Line chocolate collection has been strengthened with must-have travel chocolate buddies, including Munz Airplane, Munz Boat, and Munz Skyrocket.

The new Munz Swiss chocolate tins will complete the existing Kids Line, featuring: Ms Munz Ladybug, Ms Munz Bee, Ms Munz Unicorn, Ms Munz Butterfly, Mr Munz Pingu, Mr Munz Camel, and Mr Munz Panda.

Playfully-wrapped chocolate pieces of delicious Swiss milk chocolate are the unique extra to discover in the Travel Line tins.

 **Basement 2/2-F22**

Nordic Projekt's revolutionised reading glasses

Swedish-owned group Nordic Projekt has revolutionised the reading glasses industry with its innovative approach to product design and customer experience. After years of experience, founders Andreas and Jonna Roxe decided to create their own eyewear brand. Launching a 360° concept, they revolutionised the reading glasses sale system, allowing Nordic Projekt to become the leading brand of reading glasses in Spain.

Now with 31 global locations and 6,000 points of sale, Nordic Projekt has introduced its three brands: Nordic Vision, Perspektiv and Matters amongst different audiences including pharmacies, retail stores and its already growing global footprint in travel retail.

Throughout its journey, Nordic Projekt has shown huge commitment to innovation by covering and often anticipating customers' needs and requirements, travellers not being an exception. From screen glasses that protect from eye strain to foldable glasses that can be carried anywhere, Nordic Projekt offers a wide range of products that are perfect for anyone.



 **Basement 2/2-K12**

Mondelēz “constantly innovating for greater good of confectionery category”

With 2023 being the year of growth for the industry, Mondelēz International believes some of the best potential to drive that lies within Asia Pacific markets, especially those that have had slower recovery times.

“This is the optimal time to harness the lessons from the past two years to pave the way forward and I am eager to return to TFWA Asia Pacific Exhibition & Conference to exhibit new ideas and discuss with industry leaders how to accelerate growth,” says Jaya Singh, Managing Director, Mondelēz International WTR. “A lot has changed since we were all last physically present in Singapore for this event. Part of that is new spending habits and mentality, including a strong consumer focus on sustainability. At Mondelez World Travel Retail (WTR), we are looking forward to discussing with industry peers how we can collectively harness our strengths in a partnered approach to driving accelerated conversion in the interest of category growth.”

Mondelez WTR has always been committed to constantly innovating, for the greater good of the confectionery category. “In our evolved category vision, we focus on three key areas of innovation to drive penetration and accelerate conversion: a winning portfolio, to address growing need states and changing shopper preferences; elevating category awareness, through more physical and mental touchpoints; and delivering unique experiences, with



Jaya Singh, Managing Director, Mondelēz International WTR: “At Mondelez World Travel Retail, we are looking forward to discussing with industry peers how we can collectively harness our strengths in a partnered approach to driving accelerated conversion in the interest of category growth.”

outstanding and significant concepts,” Singh explains.

Toblerone is one of many brands at the forefront of Mondelez WTR’s efforts to elevate the category through unique experience. “We know that travellers are increasingly on the look-out for something original and personalised, which is why we are currently rolling out new, enhanced Toblerone sleeve printers in various locations worldwide to deliver an exceptional moment for travellers to remember,” Singh comments.

Gen Z and Millennial travellers are placing sustainability and innovation higher in their priorities than ever before and Mondelez WTR is constantly exploring how it can better meet their expectations. “Equally, in an age where digitalisation has been accelerated by the pandemic, consumers increasingly demand innovation and technology across the online to offline offer and throughout the travel journey,” Singh adds. “It is, therefore, no surprise that digitalisation has become increasingly important for us.”



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Imperial Brands launches new Davidoff cigarettes lines



Imperial Brands is showcasing its new lines of Davidoff cigarettes – Davidoff Reach and Davidoff Evolve – some of which have recently been launched in the region.

Alongside Davidoff cigarettes, visitors to Imperial Brands' sustainable stand can also experience the company's exciting cross-category offer. This includes well-known international brands such as Gauloises, West and Rizla, along with locally-trusted brands, such as British consumer favourites Lambert & Butler, Drum and Golden Virginia.

"Davidoff is one of our most recognisable global names in tobacco with a heritage closely tied to its founder Zino Davidoff," said Vangelis Nikolopoulos, Global Duty Free & Export Regional Manager for Region East, Imperial Brands. "This premium cigarette brand is one of the most popular choices among globetrotting adult smokers and remains critical to our Asia Pacific business."

 **Basement 2/2-C38**



KT International showcases latest CORSET capsule collection

KT International is presenting its latest CORSET capsule collection. Inspired by the vibrancy of the design of the Shellpack range, the brand has altered the look and feel of CORSET DEUX and CORSET DOUBLE to match the premium quality and high-fashion sense searched for by its consumers.

CORSET DEUX is with a single menthol capsule, while CORSET DOUBLE possesses a taste of menthol glaze and blueberry blush.

Innovated and crafted with inspiration, knowledge and precision from start to finish, CORSET was designed for her – confident, magnetic, independent. From the refined taste of carefully-selected high-quality tobaccos in creating the renowned and premium American blend of CORSET to the crafted pack, CORSET Shellpack sets a new benchmark.

 **Basement 2/2-E37**

Nanyang Brothers Tobacco presents high-end flagship series

Nanyang Brothers Tobacco is presenting the Double Happiness Heritage 1905 Slims Series. The 'Heritage 1905' is a high-end flagship series under the '1905' sub-brand. The gift box of this series uses the concept of environmentally-friendly, fully-degradable paper moulds. Meanwhile, the Tin Pack is the world's first vacuum tin flue-cured tobacco in oval shape. While providing consumers with a new texture experience, it also reflects the pioneering tobacco manufacturing capability and social responsibility of Nanyang Brothers Tobacco as a century-old enterprise.

Heritage 1905 Slims, a combination of softness and strength, is a deepening cultural connotation of the Chinese slim cigarettes category. It is well catered to the Chinese gifting market by offering consumers an experience of luxe.

Nanyang Brothers Tobacco is also highlighting Double Happiness Ngaikuo Slims, and Double Happiness Nanyang Classic 1905 Slims.

 **Basement 2/2-E38**



Starward showcases travel retail exclusives



Starward Australian Whisky is showcasing its core range of whiskies in a travel retail exclusive one-litre bottle. The range showcases its signature red wine barrel maturation, with each whisky offering a unique flavour or process. It includes: Starward Two-Fold 1L – an approachable blend of wheat and single-malt whisky matured in Australian red wine barrels; Starward Nova 1L – the signature single malt whisky, fully matured in Australian red wine barrels; Starward Solera 1L – aged in Australian Apera barrels; and Starward Fortis 1L – a bold single malt whisky that is rich and full-bodied.

 **Basement 2/2-E19**

Travel Blue unveils Our Blue Way

TTravel Blue is revealing its sustainability initiative, Our Blue Way. It aims to grow the accessories market and is committed to doing this in a genuinely responsible way. Over 50% of Travel Blue products sold this year will be made from recycled or recyclable material.

Travel Blue neck pillows and the group's mobile accessories brand, Lexingham, are the focus at TFWA Asia Pacific Exhibition & Conference. Travel Blue neck pillows are now made with a 94% recycled cover, 100% recyclable foam and 100% recycled packaging.



 **Basement 2/2-G1**



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Basement 2/2-M3



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Indulgent premium cream liqueur

Distell International is launching Amarula Chocolate – the brand's most indulgent premium cream liqueur with a velvety milk chocolate taste. The rich and distinctive flavour of Marula fruit is perfectly complemented by the full bodied, fragrant chocolate undertones of real African cocoa beans.

Distell's focus on premium quality and fine flavour is underpinned by a deep commitment to using only sustainably sourced cocoa. African cocoa is renowned around the world for its intense chocolate aroma and flavour. African cocoa beans have a light to medium body, which perfectly complements the citrus and tropical flavours of the Marula Fruit.

Distell is also showcasing the new Ledaig Sinclair Series Rioja Cask Finish. The new Sinclair Series, inspired by Tobermory Distillery Founder John Sinclair, celebrates Tobermory's heritage and creative approach to distilling.

Basement 2/2-J25



Halewood presents duo of alcohol-free Whitley Neill launches

Halewood Artisanal Spirits is showcasing a duo of alcohol-free launches from premium gin brand Whitley Neill. The brand is expanding into the 'low and no' category for the first time with the new 0.0 variants for its Rhubarb & Ginger and Raspberry gins.

Both variants have been made with real Whitley Neill gin, and de-alcoholised using the only spinning cone vacuum column still in the UK. This process boils liquid at a much lower temperature, which helps to retain the distinctive flavours and characteristic top notes of Whitley Neill.



Basement 2/2-N9

Von Eicken presents Chapman premium aroma cigarettes

Von Eicken is highlighting brand concept Chapman, which has been established with the promise of high-quality smoking pleasure from German production.

Chapman premium aroma cigarettes has become a globally successful premium brand, especially in the East European and Asian markets where customers are looking for delicious flavours that are created by special blends of the finest tobaccos from the most diverse growing regions and countries of origin.

Chapman Aroma is produced with sweetened filter paper as an additional flavour booster. Chapman cigarettes are available in eight different varieties of King Size cigarettes and Superslim cigarettes, as well as various Compact and King Size Superslim cigarettes. The Chapman aroma world ranges from the Classic version to creamy Vanilla and Coffee, and the fruity sensations Cherry, Apple, Wild Berry and Grape.



Basement 2/2-D37



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Luxury, performance and pleasure

Clarins Group has captured the special power of the Moonlight flower using an exceptional technological process. The result is a new type of skincare called Clarins Precious, which preserves the skin and stimulates its own youthful resources.

The range includes Precious La Crème. When applied, skin regains an ideal 'bounce back' quality, looking plumped and toned. Smoothed, the skin radiates a natural and healthy-looking glow. Wrinkles are visibly less noticeable, and the complexion looks pure and radiant. Skin is resolutely stronger and visibly younger looking.

La Crème's delicate signature fragrance was inspired by the subtle scent of vanilla, which is reminiscent of the Moonlight flower's scent when it blooms, peony and a woody musk.

Level 1/1-R23



A story behind every scent



Penhaligon's is showcasing the new Luna and Solaris fragrances from Penhaligon's. A celebration of 150 years of fine British perfumery, the Penhaligon's library of British Tales perfectly sums up the brand's philosophy. Inspired by history, myth, lore and legend, there's a story behind every scent.

This year sees Penhaligon's introduce a fresh story around the astral universe with new fragrance Solaris. The brand has also revamped its best seller in the British Tales pillar, Luna.

Solaris is the sun, the source of everything. The fragrance contains a warming embrace of sandalwood, eclipsed by ylang ylang's golden flare, as lemons and powerful blackcurrants shimmer in its glow.

Luna, the moon goddess' eau de toilette, is fit for a voyage to the Moon and back. It glimmers with orange, jasmine, soft rose and fir balsam.

Basement 2/2-K11

Jägermeister bringing 'The Secret is You' campaign to life

Jägermeister, maker of the world's most successful herbal liqueur, is debuting at TFWA Asia Pacific Exhibition & Conference, where it is bringing its global travel retail campaign 'The Secret is You' to life.

The campaign celebrates travellers who are the secret ingredient in the artistic process. This year, the campaign will transform more than 60 Jägermeister airport spaces into an outpost of the Ice Kühl Gallery, showcasing multi-media art exhibitions.

The impressive Jägermeister two-storey stand is a cutting-edge digital art experience, which encourages visitors to express themselves by creating their own 'meister piece' and sharing the experience on social media. Jägermeister, Jägermeister Cold Brew Coffee and Jägermeister Manifest are being featured at the show.

Basement 2/2-F2





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TFWA i.lab Asia – the ideas hub that shines a spotlight on innovative ways to engage the travelling consumer – makes its debut in Singapore. Opening at 09:00 today, it is located in a dedicated area on Level 1 of the Marina Bay Sands Expo & Convention Centre.

TFWA i.lab Asia at a glance

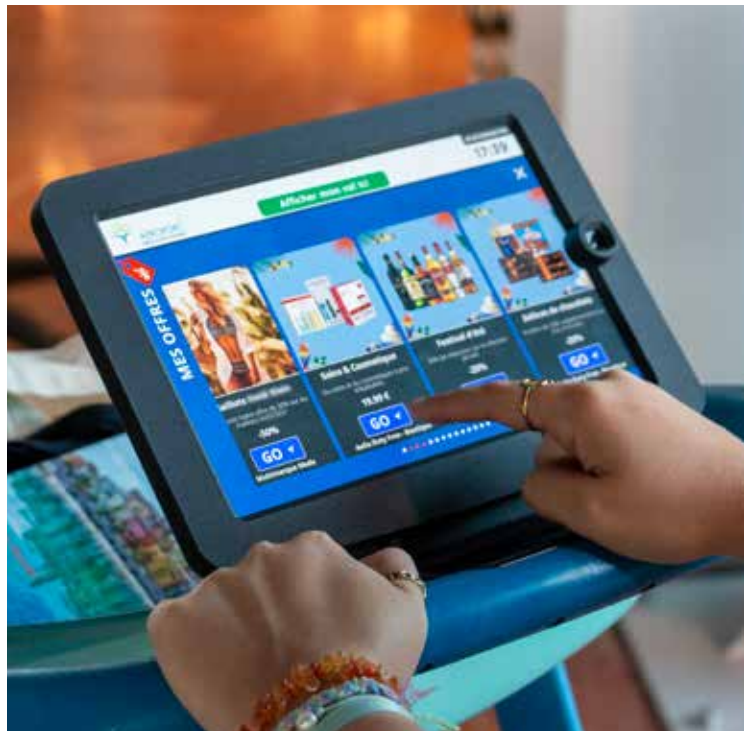
- TFWA i.lab Asia makes its debut in Singapore this year.
- Opening hours: 9-10 May, 09:00-18:00; 11 May, 09:00-17:00.
- Location: Level 1, Marina Bay Sands Expo & Convention Centre.
- TFWA Asia Pacific Lounge: Level 4, Marina Bay Sands Expo & Convention Centre; 18:00-21:00, Tuesday 9 May and Wednesday 10 May.
- Exhibitors will benefit from the TFWA ONE2ONE meeting service: an opportunity for TFWA i.lab Asia exhibitors and visitors to meet face-to-face.

Intelligent Track Systems: innovative trolley solutions for airports

Intelligent Track Systems' (ITS) – Level 1 1-P11/7 – trolleys are designed to improve the passenger experience through real-time flight information and wayfinding features, and to provide a first-class shopping experience through personalised advertising and promotions. Since summer 2022, ITS has been running product trials at airports worldwide, such as Riyadh, Hamburg, Oslo, Nice and San Diego.

“Our free-to-use intelligent trolleys are designed to assist airside passengers with wayfinding and shopping,” explains Morten Pankoke, Managing Director, Intelligent Track Systems A/S. “The touchscreen display allows trolley users to peruse through the concession offers at their leisure. The interactive map enables passengers to browse product information, menus, and special deals, before being guided to the retail or F&B offering of their choice. The trolley’s heatmapping, survey and call-to-action capabilities have proven a success during all our pilot tests, helping to elevate both the passenger experience and non-aeronautical revenues.”

Survey results show very high levels of customer satisfaction when shopping in airports. “Data in the form of heatmaps, combined with retailers’ sale figures, confirm that promotion and brand advertising on the trolley screens results in users spending significantly more money on retail than other passengers,” says Pankoke. “In 2023 we will launch several exciting new partnerships – to be announced soon!”



Intelligent Track Systems' trolleys are designed to improve the passenger experience through real-time flight information and wayfinding features, and to provide a first-class shopping experience through personalised advertising and promotions.

Xctuality: immersive technology

Xctuality (Level 11-P11/15) is a Singapore-based immersive technology startup, connecting people – anyone, everywhere. “Our innovative solutions lay the foundations for Smart City ecosystems, and harness technology for the better of humanity,” says Warren Woon, Co-Founder & CEO, Xctuality. “By developing the next evolution of social networking, we are cultivating collaborative environments beyond borders, and redefining the way humans connect. The Metaverse is an important part of our Smart City vision, and with the launch of XctualLyfe last year, it became Singapore’s first home-grown Metaverse platform.”

The travel industry is one of the first few industries Xctuality has targeted in its go-to-market strategy to build out immersive technology ecosystems that can empower stakeholders to monetise. “A core part of our go-to-market strategy is the implementation of our phygital experience, where we combine digital experiences with physical engagements, so as to drive footfall to our stakeholders’ physical locations while increasing overall transaction volume,” Woon explains. “The phygital experience in our Travelverse consists of connecting the Metaverse with important utilities such as payment gateways, digital wallets, NFTs, blockchain and IoTs, including a smart vending system. Users are immersed in a gamified experience curated from various travel industry stakeholders, such as hotels, venues, and other points of interest. Points and tokens earned in-game can be redeemed for physical merchandise that are dispensed via vending machines in real life. We intend to implement this phygital experience utilising our partner’s existing machines across Singapore Changi Airport.”

The first stage of the phygital experience starts with the discovery of Xctuality’s Travelverse through casual gameplays that reward users with free coffee, soft drinks, travel essentials and accessories. It is during the first stage that users will be led to the discovery of the second stage, which engages them in pre-arrival

to Singapore and other destinations Xctuality will partner in the future. “It is during this pre-arrival experience that users can win or purchase tickets to their favourite attractions, or perhaps reserve a room at their favourite hotels,” says Woon. “The third stage of the phygital experience enables travellers to shop in the Metaverse and other virtual portals prior to departure, and collect their merchandise at the appropriate airport departure lounge via automated or manned kiosks.”

The Travelverse phygital experience provides persistent and pervasive online to offline to online engagements, while driving revenue-generating interactions.

Warren Woon, Co-Founder & CEO, Xctuality: “By developing the next evolution of social networking, we are cultivating collaborative environments beyond borders, and redefining the way humans connect. The Metaverse is an important part of our Smart City vision, and with the launch of XctualLyfe last year, it became Singapore’s first home-grown Metaverse platform.”



Singapore Tourism Board

The Singapore Tourism Accelerator was set up to source for the world’s most innovative technology solutions to power the travel and tourism industry in Singapore. As of March 2023, the Singapore Tourism Accelerator has supported 47 start-ups to develop 56 industry solutions across 6 cohorts.

Singapore Tourism Board (STB) continues to support the Accelerator Alumni with connection and showcase opportunities, for them to grow their business in Singapore, and to create a vibrant tech-ecosystem for the tourism sector. If you are interested in how you can partner STB for the Singapore Tourism Accelerator, contact: innovation@stb.gov.sg.

About STB:

The Singapore Tourism Board (STB) is a statutory board under the Ministry of Trade and Industry of Singapore. It champions the development of Singapore’s tourism sector, one of the country’s key service sectors and economic pillars, and undertakes the marketing and promotion of Singapore as a tourism destination.

TFWA I.LAB ASIA EXHIBITORS

- **Baidu International** – Level 11-P11/9
- **Bambuser** – Level 11-P11/12
- **BeLive Technology** – Level 11-P11/14
- **Cainiao** – Level 11-P11/4
- **Cosmose AI** – Level 11-P11/3
- **DutyFreak Airport.Store Marketplace** – Level 11-P11/5
- **FirstHive** – Level 11-P11/6
- **iClick Interactive** – Level 11-P11/10
- **Intelligent Track Systems** – Level 11-P11/7
- **Paris Calling** – Level 11-P11/2
- **Qunar.com** – Level 11-P11/13
- **Singapore Tourism Board** – Level 11-P11
- **TravelX** – Level 11-P11/1
- **Ulisse** – Level 11-P11/11
- **Woohoo** – Level 11-P11/8
- **Xctuality** – Level 11-P11/15

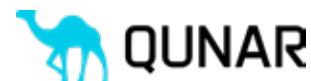
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SKROSS expands offering with high-quality travel accessories

S KROSS has expanded its product offering with a selection of high-quality travel accessories. It studied an iconic Swiss item: the Swiss Army Blanket. Using the same design concept, SKROSS translated it into a fresh and modern shape.

The Travel Pillows stand out not only with their colours, but also their shape. They are described as far removed from everyday designs. Meanwhile, the Deluxe Sleep Mask reflects the look of ski goggles and is said to be so comfortable, you won't want to take it off.

The Luggage Tags are made of leather and felt for a premium look and feel. Luggage Straps are eye-catching and provide maximum safety for luggage.

 **Basement 2/2-F9**



A new approach to natural skincare



A lmora Botanica is a natural vegan skincare brand complete with seven products created to either prevent or repair skin damage. The products use powerful adaptogenic ingredients in the formulas, helping the skin to rebalance and adapt to any individual's needs. The high-impact formulations use the purest botanicals sourced from nature to deliver supple, nourished skin.

Special attention has been paid to adaptogenic ingredients – such as Borage seed and Centella Asiatica leaf extract – which strengthen collagen networks, smooth skin surfaces, and maintain epidermal balance while moisturising and nourishing the skin.

Launch products include: Purifying Gel Cleanser, Hydrating & Resilience Face Lotion, Radiance Day Face Oil, Nourishing Night Face Oil, Restorative Night Face Oil, Serum for Fine Lines, and Restorative Hand Cream.

 **Level 1/1-N9**

Gisada underlines travel retail aspirations



G isada is presenting its luxury fragrance portfolio to travel retail customers at TFWA Asia Pacific Exhibition & Conference, in line with the company's objective to grow its general presence in the channel and expand further within the region.

Its focus at the show is on the Prestige collection with Ambassador Men and Ambassadora, and the Luxury collection with five very special fragrances.

Ambassador Men is Gisada's all-time top-seller. Launched in summer 2022, Ambassador Men Intense is a richer reinterpretation of its predecessor.

Representing modern elegance combined with Swiss quality, the Gisada fragrance assortment features distinctive, in-demand scents, for women and men, composed using ingredients of the highest quality.

 **Basement 2/2-G15**

Bacardi focuses on innovation in product, experience and omnichannel



Bacardi Global Travel Retail plans to deliver growth in helping transform the spirits category with a focus on innovation in product, experience and omnichannel engagement.

Two key innovation launches being revealed at TFWA Asia Pacific Exhibition & Conference are DEWAR'S Double Double 37 Year Old and BOMBAY SAPPHIRE Premier Cru Tuscan Juniper.

DEWAR'S Double Double 37 Year Old launches with Lotte at Changi Airport in a two-month global exclusive ahead of all other markets, including key domestic locations. DEWAR'S has an ambition to be the most progressive whisky among 'new appreciators' – the tastemakers, driven by curiosity and exploration in discovering new whiskies and being the first to try something more progressive in ageing and taste. With Malt Scotch holding a 28% whisky share in GTR (IWSR 2021), this launch will build brand awareness and equity within the Prestige/Prestige + category.

BOMBAY SAPPHIRE Premier Cru Tuscan Juniper, launched in April 2023, is designed to delight gin-loving travellers and builds on BOMBAY SAPPHIRE'S position as the top-selling premium gin in global travel retail (IWSR 2021). This super-premium small-batch, handcrafted gin is perfect for gin-lovers to make any occasion feel more special and to elevate their home cocktail-making experience. Additionally, the elegant bottle design and premium cork closure attract attention, making it an ideal gift. Within its mission to be the most sustainable global gin, each botanical in BOMBAY SAPPHIRE Premier Cru Tuscan Juniper is sourced from sustainably-certified suppliers.

 **Basement 2/2-G22**

New English Teas launches Peter Rabbit Daisies Collection

Among the new products being showcased by New English Teas is the Peter Rabbit Daisies Collection, with new additions to its officially-licensed Beatrix Potter range. The new 'Daisies Collection' features illustrations of the iconic fictional character Peter Rabbit against a striking floral background. This beautiful design is further enhanced by embossed features and is now available across different sizes of tea tins and tea caddies. The 'Daisies Collection' forms part of New English Teas' extensive Beatrix Potter range, showcasing illustrations from the famous British author.

 **Basement 2/2-E29**



Royal
STYLE

Fresh faces in Asia Pacific



01

Margaret Dabbs London

Basement 2/2-K10

Who are you?

At the heart of the business is Margaret Dabbs OBE who, with a background in podiatry, has guided the business and infused her own philosophy into all of the company's products and treatments. For travel retail, a carefully chosen portfolio of products has been selected from the multi award-winning range, including specially created 'traveller' duo-packs.

Who buys your products?

Our products are perfect for women, men, and young adults – our audience is very wide. We've selected a range that is perfect for travellers who inevitably arrive at their destinations with tired legs, sore feet, dry hands, and chipped nails.

Why exhibit now?

Within Asia the products are distributed in domestic markets including Hong Kong, South Korea, Taiwan, and China. With the brand becoming well-established in Asia, it makes perfect sense to exhibit. We already have a good presence with Asian airlines including Hong Kong Airlines, HK Express, Tigerair and Singapore Airlines, but there is plenty more potential – and not just with airlines, but airport shops, downtown, and the rapidly-growing cruise market.

What are your objectives?

To introduce our range to buyers across the region. We've had a phenomenal response since we launched into the channel in 2021 through GMax Travel Retail and now that travel is recovering in Asia, the time is right for us to focus on the region. In fact, we are so confident of how good our products are that we're offering mini-treatments on the stand.

What is your unique selling point (USP)?

We see ourselves as pioneers of powerful, results-driven formulations that deliver products harnessing the best of medical science with the best of beauty. Our products are innovative, sustainably sourced, cruelty free and – best of all – they work.

02

Thélios

Level 1/1-U20

Who are you?

Thélios is the eyewear expert of LVMH Group. We design, produce, and distribute sunglasses and optical frames for some of LVMH's most prestigious Maisons: Dior, Fendi, Celine, Givenchy, Loewe, Stella McCartney, Kenzo, Berluti and Fred.

Who buys your products?

Representing some of the world's most high-end luxury brands, we are targeting the world's elite travellers, who know and appreciate our brands, being drawn to excellence in terms of quality and design.

Why exhibit now?

It's an opportunity for us to share our vision, strategy and ambitions for the Asia Pacific region in terms of travel retail with our partners and prospects. We believe that this exhibition is a great platform for us to connect with industry leaders in the region, form new partnerships, and further establish ourselves as a key player in the market.

What are your objectives?

Our objectives at TFWA Asia Pacific Exhibition & Conference are twofold. Firstly, we aim to meet with our existing travel retail partners to discuss the state of our business and upcoming projects and priorities. Secondly, we are also looking to connect with new partners who are interested in exploring new opportunities with us in selected locations where we want to increase our Maisons' visibility and market share.

What is your USP?

As the LVMH eyewear expert, our unique selling point lies in the strength of the world leader in luxury: a portfolio comprising some of the world's most prestigious luxury brands, a highly selective distribution approach, unparalleled 'Made in Italy' quality products fully integrated into the Maisons' core-offer, along with impactful visual merchandising concepts.

Here, we highlight a selection of the leading brands that are either debuting at TFWA Asia Pacific Exhibition & Conference this year or returning after an absence.



03

VERDILAB

Basement 2/2-M25

Who are you?

VRFD SA is a Swiss house of health-oriented brands. VERDILAB is a first skincare brand launched by the company in 2021. It is the first high-tech, 100% natural and clean Swiss skincare that supports the natural immunity of the skin with clinical proof to back it up. Powered by patent-pending ImmunatuRNA technology backed by 50 years of scientific research. ImmunatuRNA is a scientific heart of VERDILAB collection – it is exclusive to the brand, proprietary technology that provides skin's natural protection against damaging free radicals, while significantly accelerating its regenerative abilities.

Who buys your products?

An all-inclusive line for forward-thinking luxury consumers who are conscious and considered about their skincare choices and look for effective alternatives to conventional premium skincare products.

Why exhibit now?

We look for reliable partners to develop the international presence of VERDILAB, especially in the Asian and MENA regions.

What are your objectives?

Present VERDILAB to potential partners in Asia Pacific.

What is your USP?

VERDILAB is inventing a new generation of sustainable luxury skincare that genuinely works. It is the only 100% natural and clean, high-tech Swiss skincare brand that strengthens the natural immunity of the skin to ensure its healthy condition and beautiful, natural look.



04

On the Mark Consultancy

Basement 2/2-L26

Who are you?

On the Mark Consultancy works with beauty brands and customers to offer the most innovative and on-demand product portfolio to travel retail. We offer full distribution, management, supply and consultancy to global beauty brands and bring them to all travel retail channels.

Who buys your products?

We work with many brands, and those brands all have a different target market. Some brands have 1.5 million+ Instagram followers and will appeal to the Millennial and Gen Z generations. Some are beauty staples that are globally recognised and will be in everybody's routine. That's the beauty of our company, pardon the pun – we work with global beauty brands that cover all ages and skin concerns, make-up trends and hair care.

Why exhibit now?

We had prepared to exhibit in 2020, and we know what happened then! We have weathered the storm well and the business is thriving. It makes sense to continue with our plans to extend into new markets and now is the perfect time.

What are your objectives?

We work with brands that perform well in the area and we want to ensure that the travel retail world knows this. We will see existing customers and hope to make new ones too. We want to get the message out there, about what we do and how we can form strong relationships to grow business.

What is your USP?

Beauty is our speciality; our brands are our partners and our customers at the heart of everything we do.

Holland Duty Free highlights Messi kids apparel

Holland Duty Free has announced it is the duty free distributor for baby, toddler and kids lifestyle/leisure apparel products of legendary football player Lionel Messi. It strives to introduce brands that, apart from being exclusive, have a wide spectrum of interest in the duty free world.

Lionel Messi has 429 million followers and 185 billion hashtag views on Instagram, highlighting his global popularity and influence. Holland Duty Free's Messi collections are expected to attract a lot of new customers, helping generate new turnover and boosting duty free sales.

 **Basement 2/2-F03**



Henkell Freixenet showcases NPDs for travel retail



Henkell Freixenet is introducing new product developments and GTR exclusives from several of its sparkling wine brands. A brand-new addition to the Italian spritz drinks market is Mionetto Aperitivo, a deliciously bittersweet herbal liqueur drink born from a special Italian recipe full of distinctive flavour, perfect for mixing with Mionetto's classic Prosecco. Made from 100% natural flavours, Mionetto Aperitivo stands out for its harmonious blend of sweet red oranges and licorice, fresh acidity from citrus and the bitterness of select botanicals. A special Mionetto Spritz combo gift pack is available in GTR, including the new Mionetto Aperitivo 500ml and one bottle of Mionetto Prosecco DOC Treviso.

Further to its launch during TFWA World Exhibition & Conference last year, the latest premium positioned Freixenet Elyssia Cava is available with a redesigned bottle and more contemporary label.

 **Basement 2/2-G13**

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