MEADFA joins m1nd-set B1S recovery monitor

The Middle East and Africa Duty Free Association (MEADFA) has now joined other associations in signing up to m1nd-set's B1S COVID-19 recovery monitor initiative, helping to ensure their members receive up-to-date traffic and shopper insights data. Recently, travel retail associations including ASUTIL, IAADFS and ETRC announced joining m1nd-set in the research partnership.

The B1S recovery monitor is a complimentary service provided by the Swiss research agency, which will comprise quarterly reports with key traffic trends and relevant shopper insights, tailored to each regional association, from m1nd-set's proprietary Business 1ntelligence Service (B1S) data tool.

m1nd-set Travel Retail Director Clara Susset commented: "We're delighted that another of the leading travel retail trade associations has signed up to research partnership initiative. m1nd-set has had the privilege of working with MEADFA through conference presentations over the years so we are delighted to be supporting this traditionally vibrant region and providing our insights once again to the MEADFA members."

MEADFA President Haitham Al Majali, who is also CEO of Jordanian Duty Free Shops, added: "The Middle East and Africa region is at the crossroads of global aviation and at the epicentre of innovation in the travel retail space. As the m1nd-set insights illustrate, our recovery will be among the strongest over the next 12 months. While I am positive and optimistic that we will continue to remain dynamic despite this downturn, traffic is not set to return to 2019 levels for another 2 years. These insights will be an essential service to all MEADFA members as we try to navigate through these stormy waters and chart our way forward to a robust recovery. We are truly grateful to m1nd-set for their support."

Decline consistent, more rapid recovery

m1nd-set's b1s recovery monitor – Middle East & Africa
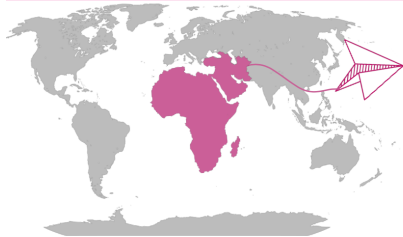
International departures from Middle East & Africa
PAX in millions of passengers and Y.O.Y Growth

2019	2020	2021	2022	2023
222.4	62.3	102.9	166.5	223.7

-72% → +65% → +61.7% → +34.4%
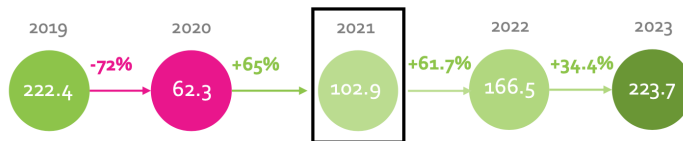
Top 10 direct destinations from Middle East & Africa - International PAX departures 2019

#1	DXB - Dubai, AE
#2	IST - Istanbul, TR
#3	CAI - Cairo, EG
#4	CDG - Paris-De Gaulle, FR
#5	LHR - London-Heathrow, EN, GB
#6	JED - Jeddah, SA
#7	KWI - Kuwait, KW
#8	ADD - Addis Ababa, ET
#9	RUH - Riyadh, SA
#10	DOH - Doha, QA

Top 10 nationalities departing from Middle East & Africa
Share of passengers per international departures 2021

Nationality		Share
UAE		7.75%
Saudi Arabia		7.19%
India		6.34%
Egypt		5.49%
United Kingdom		4.78%
France		4.18%
United States		4.07%
Germany		3.05%
Pakistan		2.92%
Kuwait		2.78%

Top 10 airports in Middle East & Africa
International PAX departures 2021

#1	DXB - Dubai, AE
#2	DOH - Doha, QA
#3	AUH - Abu Dhabi, AE
#4	JED - Jeddah, SA
#5	CAI - Cairo, EG
#6	TLV - Tel Aviv-Yafo, IL
#7	KWI - Kuwait, KW
#8	ADD - Addis Ababa, ET
#9	MCT - Muscat, OM
#10	SHJ - Sharjah, AE

The first quarterly report for MEADFA shows traffic decline of 73% from 2019-2020 — consistent with

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that experienced in other regions, which ranges globally from -68% to -75%. Year on year, international departures in the Middle East and Africa region fell from 222.4 million passengers to 62.3 million in 2020.

While the decline was in line with other regions, m1nd-set says the recovery will be among the most robust compared to other regions. Expected regrowth is +65 in 2021, to reach 103 million international departures, +62% in 2022 and +34.4% from 2022 to 2023, to reach 224 million international departures. This is slightly more than 2019's numbers and so represents a return to normal.

Destinations and nationalities

Pre-pandemic, top destinations outside the region were Dubai, Istanbul, Cairo, Paris Charles de Gaulle and London Heathrow. Within the region, the most popular destinations included Jeddah, Kuwait, Addis Ababa, Riyadh and Doha.

In 2021, the top travelling nationalities traveling from the region will be UAE, Saudi Arabia, India, Egypt and the UK. International departure passenger numbers will be led by Dubai, followed by Doha, Abu Dhabi, Jeddah and Cairo.

Post-COVID travel and shopping behavior

Research shows the majority of passengers from the region (59%) do not plan to travel immediately after travel restrictions are lifted, but rather to wait approximately six months.

While international travel recovery will be faster in the MENA region than others, interaction with airport shop staff will be among lowest. Just over half of shoppers from the region say they will continue to engage with sales staff in travel retail shops once the pandemic is over, but will continue to take precautions such as wearing a mask. Only 25% say they will try and test products without any concerns post-COVID, significantly lower than other world regions.

Beauty has been the leading category across the top travelling nationalities in the region; both travel retail exclusives and staff interaction count among the top purchase drivers among these nationalities.