



BY THE NUMBERS

ACI 2011 World Airport Traffic Report: Airport passenger traffic remains strong; slower growth predicted for 2012

Global airport passenger traffic posted another record year in 2011, despite being a year plagued with economic uncertainty, natural disasters and sociopolitical upheaval, reported ACI World Director General Angela Gittens this week, as she announced the release of ACI's 2011 World Annual Traffic Report.

World passenger traffic grew to 5.4 billion passengers in 2011, up 5.3% from 2010. International traffic jumped by 6.6%; and five out of six regions reported increases.

Air cargo did not fare as well, with volume almost flat at 93.1 million tons, said Gittens.

Key 2011 statistics (1,520 airports in 156 countries reporting)

* Latin America-Caribbean (+8.5%), Middle East (+7.7%), Asia-Pacific (+7.0%) and Europe (+7.0%) all showed robust growth in passenger traffic; North America

(+1.8%) experienced moderate growth. Northern Africa, Africa (-3.5%), with the brunt of social and political unrest, recorded a contraction in year-over-year passenger traffic.

*Worldwide domestic traffic increased by 3.7%, and international traffic jumped by 6.6%.

*Worldwide aircraft movements increased 2.3% to 77 million.

* 70% of airports worldwide registered positive passenger growth at an average of 7.9%, while 30% of airports lost traffic at an average rate of -5.9%.

Gittens says that growth rates in monthly passenger traffic were relatively stable for most of 2011, with the emerging markets of Latin America-Caribbean, Asia-Pacific and the Middle East posting strong gains. Passenger traffic in Africa declined, and North America

experienced more moderate growth.

"Europe was still able to stay afloat with an impressive growth rate of 7% despite the economic slowdown and the move to government austerity in the latter half of 2011. This is partly explained by the growing number of international traffic passengers passing through European airports," she says.

Outlook for 2012

Preliminary ACI statistics received just before press time showed global passenger traffic up 5% for the first six months of 2011, reports ACI.

Commenting on the prospects for the remainder of the year, ACI World Director of Economics and Program Development, Dr. Rafael Echevarne, noted that the traffic outlook for 2012 is mixed:

"Although passenger traffic in 2012 is expected to grow, the significant slow-down of the economies in the BRIC countries, together with the continued economic troubles in Europe and the United States, means that the overall growth rate in passenger traffic will be at less than 5%."

Dr. Echevarne forecasts that cargo traffic will decline from 2011 levels, "mainly driven by the low business and consumer confidence in the largest international economies."

ACI notes that the 2011 World Annual Airport Traffic Report provides new perspectives and analyses based on an expanded airport traffic data set, and adopted a historical perspective to quantify the adverse impact of major events on airport traffic and demonstrate the resilience of air transport demand over the last decade, plus other improvements.

Record number of brands to exhibit at TFWA Cannes

More brands than ever before will be exhibiting at TFWA World Exhibition which opens in the Palais des Festivals in Cannes on Sunday, Oct. 21.

A total of 462 companies are exhibiting, many with several international brands on their stand.

TFWA reports that the total exhibition space has topped 21,000sqm for the first time and includes the new Beach Village where Philip Morris International, among other companies, will inaugurate a large exhibition space.

Despite careful space utilization and the addition of the Beach Village, TFWA says there is still not sufficient space to meet demand, and some companies remain on the waiting list.

The 2012 event will feature 38 exhibitors that are new/and or returning after an absence. These include Amore Pacific, Elizabeth Arden, By Terry and Victoria's Secret in Fragrances & Cosmetics; Hugo Boss, Malo, Mandarina Duck and Samsonite in Fashion, Luggage and Accessories; Bodegas Osborne, Botran Rum and Chateau Le Puy in Wine & Spirits; Glam Rock in Jewelry & Watches and others.

The new Beach Village will host a new indoor Beach Restaurant with a terrace facing the sea. This restaurant replaces the former Bay Restaurant.

The on-site Business Centre has been refurbished with new meeting rooms and the TFWA Members' Lounge has also been redesigned to make it even more comfortable and convenient.

TFWA World Exhibition will also introduce new interactive navigator touch screens to help participants find their way around the exhibition. This system was trialed at TFWA Asia Pacific in May and proved very popular. Pre-registration for TFWA World Exhibition 2012 will remain open at www.tfwaworld.com until Sept. 12.

2011 AIRPORT TRAFFIC SUMMARY

Region	Total Aircraft Movements	% Change	Total passengers	% Change
Africa	2 581 044	(0.6)	152 274 326	(3.5)
Asia-Pacific	14 464 705	5.9	1 558 321 820	7.0
Europe	20 146 627	3.4	1 569 907 313	7.0
Latin America-Caribbean	7 789 779	5.2	408 193 920	8.5
Middle East	2 046 191	2.3	221 889 577	7.7
North America	30 046 815	(0.5)	1 529 685 608	1.8
World	77 075 161	2.3	5 440 272 564	5.3

Passengers: total passengers enplaned and deplaned, passengers in transit counted once.
Aircraft Movements: landing and take-off of an aircraft.

BUSIEST AIRPORTS - TOTAL PASSENGERS

TOP 10 WORLD AIRPORTS BY PASSENGERS				
Total Passengers: arriving and departing passengers; direct transit passengers counted once				
RANK	CITY	CODE	TOTAL PASSENGERS	% CHANGE
1	Atlanta GA, USA	ATL	92 389 023	3.5
2	Beijing, China (People's Republic of)	PEK	78 675 058	6.4
3	London, United Kingdom	LHR	69 433 565	5.4
4	Chicago IL, USA	ORD	66 701 241	(0.1)
5	Tokyo, Japan	HND	62 584 826	(2.5)
6	Los Angeles CA, USA	LAX	61 862 052	4.7
7	Paris, France	CDG	60 970 551	4.8
8	Dallas/Fort Worth TX, USA	DFW	57 803 439	1.5
9	Frankfurt, Germany	FRA	56 436 255	6.5
10	Hong Kong, China	HKG	53 328 613	5.9

Source: ACI

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INSIDER

BY THE NUMBERS

IATA predicts a tougher 2H year for airline traffic as growth rates slow

The International Air Transport Association (IATA) also sees a slowing of last year's record air traffic figures, reporting that global traffic results for July showed lower growth in both air travel and freight, but with considerable variation by region and market.

July passenger demand in aggregate was 3.4% higher than in July 2011, compared to a 6.3% increase in June and average growth of 6.5% over the first half of the year. This slowdown in travel growth is being driven largely by the recent fall in business confidence in many economies, says IATA. In July passenger capacity rose 3.6%, in line with the expansion of traffic, keeping the load factor at a relatively high 83.1%.

International passenger demand in July was up 3.5% compared to the year-ago period, exactly in line

with a 3.5% expansion in capacity. Load factors stood at 83.3%. The slowdown becomes evident when comparing to the previous month (June) when the year-on-year rate was 7.5%.

"The uncertain economic outlook is having a negative impact on demand for air transport," said Tony Tyler, IATA's Director General and CEO. "The cargo business is 3.2% smaller than it was a year ago. And passenger markets--with the exception of Africa, China-domestic and the Middle East--saw demand fall from June to July. Overall passenger demand is still up 3.4% on the previous July. But the growth trend is clearly slowing. This, along with rising fuel prices is likely to make it a tough second half of the year."

International Passenger Markets

* **North American** airlines' international traffic fell 2.1% yoy in July (after rising 1.6% in June) in part owing to decisions to trim capacity. Compared to June 2012, demand contracted by 1.3%. The load factor was 86.7%, the highest in all the regions.

* **Latin American** airlines posted growth of 5.7%, second highest among the regions, with a load factor of 82.0%. This growth is lower than the average growth of 10.1% in the 1H of the year. IATA notes that some key economies in the region, such as Brazil, have seen an interruption to economic growth, which has affected travel.

* **European** carriers recorded 4.8% growth vs July 2011 (down from 7.3% in June and a modest slowdown from 6.5% average growth in 1H) with an average load factor of 85.7%. European airlines have been able to sustain growth on long-haul markets to regions where economic growth is stronger, says IATA.

* **Asia-Pacific.** Demand growth was just 0.9%, a major slowdown from the 5.8% recorded in the June year-on-year comparison; and 1.3% less than demand in June 2012.

IATA observes that European airlines appear to be benefiting more than Asia-Pacific airlines from the recently stronger trade flows from West to East, while the Middle Eastern airlines continue to offer strong competition on long-haul markets. The downward growth trend began in the second quarter of 2012 and has now continued into the third.

* **Middle East.** 11.2% yoy demand growth is the strongest in all the regions, although less than a 12.4% rise in capacity. Compared to June, traffic rose just 0.1%.

* **African airlines'** traffic climbed 5.2% year-on-year, below a 6.3% rise in capacity. The continent's airlines have seen strong growth of 10.8% on average during the first half of the year, partly as a rebound from the Arab Spring.

**TAG Heuer partners with Venezuelan actress Eglantina Zingg**

Luxury sport watch brand TAG Heuer announced its exclusive partnership with Venezuelan actress Eglantina Zingg in an initiative that will assist the actress' Foundation "Proyecto Paz Latinoamérica" that focuses on teaching peace values through sports. The announcement took place this past week in the TAG Heuer store in Aventura Mall, Miami, where company representatives gave the actress a TAG Heuer Formula 1 Lady Steel and Ceramic pavée with diamonds.

TAG Heuer's relationship with the actress/model -- a star of MTV Latin America and *E! Glam Tour*, among others -- began when she became part of the TAG Heuer campaign: *TIME FOR REBELS*.

This partnership with TAG Heuer will serve as well to promote her projects and to convey the message that peace, development, and competitiveness are a successful mechanism of inclusion and opportunity to young people. Shown above, Stephanie Cariglio of LVMH Watch & Jewelry, bestowing Zingg with the TAG Heuer Formula 1 Lady Steel and Ceramic watch.



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Launch of Marc Jacobs Dot brings style to POS



Dot Marc Jacobs is bringing whimsy style to the POS at the Duty Free America stores at Miami International Airport this summer.



and echoes a theme that began with his first collection.

The fragrance is a lush juicy floral developed by Annie Buzantian of Firmenich in collaboration with Marc Jacobs and Ann Gottlieb.

The transparent red-tinted bottle is a joyous composition of round shapes covered in a polka-dot motif and topped with an oversized butterfly-inspired cap, and a gold coil collar. Round shaped butterflies of different shapes also adorn the bottle, and a red and black pattern of polka dots cover the outer carton.

The Marc Jacobs license is "on fire" says Meija, and is growing as one of Coty Prestige's global pillar brands.

Coty Prestige launched the third "sister" fragrance from designer Marc Jacobs in July. The delightfully playful "Dot" Marc Jacobs follows the *Daisy* (and *Daisy Eau so fresh*) and *Lola* (and *Oh Lola!*), which are now in some 260 doors in 60 countries, reports Lourdes Meija, Coty Marketing Director for Travel Retail and Export Americas.

Inspired by his love of polka dots, Dot is a personal signature for Marc Jacobs,

Cadbury launches Olympic-sized Travel Retail exclusive campaign

Cadbury took full advantage of a gold medal-winning opportunity this summer as a leading British brand and the Official Treat Provider of the London 2012 Olympic Games to promote the brand to travelers in a number of global travel channels.

Brand owner Kraft Foods World Travel Retail leveraged the Cadbury brand and its Olympic role with traveling consumers through a global marketing campaign called 'Go for Gold.' The campaign used Going for Gold promotional material, specially designed merchandising units, shopper activations and high-profile sampling to create dramatic in-store theater for travelers. KFWTR also launched a unique Olympic souvenir in the travel retail exclusive Cadbury Dairy Milk Chunk gift box with limited edition Gold Medal sleeve and introduced a promotion for travelers to receive a free chocolate gold medal with the purchase of Cadbury products.

The Go for Gold campaign was designed to operate in different retail channels, including airports and ferries. In the UK, key sites include eight London airport locations plus Manchester and Birmingham Airports. Ireland's Dublin Airport, Australia's Sydney and Melbourne Airports, and Johannesburg Airport in South Africa, also featured Cadbury Go for Gold islands in prominent in-store and concourse locations.

"By engaging traveling consumers with the Cadbury brand via sampling, games and exclusive products, Cadbury hopes to create an unforgettable Olympic experience," says KFWTR Managing Director Andreas Fehr.

"The Go for Gold campaign from Cadbury will allow retail partners to leverage the excitement of the Olympics in store and drive consumer foot-fall, and in doing so to create a delightful shopping experience for travelers. In Olympic terms, it's a gold medal winning opportunity for everyone involved."



One of the largest Cadbury Go for Gold activations was installed at Heathrow T5, where consumers step onto a Dairy Milk chocolate chunk-inspired podium to have a 'winning' photograph taken against an Olympic backdrop.



Brown-Forman Features hi-tech Display for Herradura in Cancun

In a first for its Mexico market, Brown-Forman Travel Retail unveiled a new, elaborate Herradura display in the Cancun International Airport. The display, which is strategically located in the center of the World Duty Free shop in the T3 Concourse, not only showcases Herradura, the number one selling premium tequila in Mexico, but also offers tasting opportunities as well an interactive iPad display that outlines the brands unique attributes like all-natural fermentation. The display was in operation through the end of August.

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Hershey unveils "Kit of Parts" merchandising system for travel retail

The Hershey Company has announced its first complete travel-retail merchandising system. Called the kit-of-parts, the new system provides a range of branded fixtures designed exclusively for retailers to use in duty free and travel retail stores. The fixtures can be adapted to fit any store layout and comprise back wall units, POS displays and gondola floor fixtures.

The concept was designed to create a consistent brand expression across the Hershey portfolio and drive sales of Hershey products as well as the category as a whole.

"The kit-of-parts provides our travel retail customers consistent messaging and branding that will help drive their sales," says Steve

Bentz, Hershey World Travel Retail General Manager.

"We understand that each of our retail partner's needs are different, and we offer the kit-of-parts fixtures as a whole or customized to meet individual needs," says Bentz.



Rendering of a birds-eye view of Hershey's Kit-of-Parts TR merchandising system.

Gondolas and back wall units are designed to attract shoppers to the confectionery area with proprietary logo, color and product imagery of the Hershey's, Kisses and Reese's brands, the three defining brands in the travel-retail portfolio, he says.

POS fixtures for brands such as Ice Breakers mints and gum and Hershey's chocolate bars will be introduced for use on cash wrap counters. Jolly Rancher candy and Ice Breakers have also been given merchandising treatment that highlights the brands, says Hershey.

Hershey will highlight details of the kit-of-parts merchandising system in Cannes for roll-out in 2013, and will launch its latest travel retail exclusive sharing pouches and nostalgic tins, and the new Brookside range of dark chocolate with fruit, says Benz.

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IWSR:

Havana Club named as number one Elite Brand

Havana Club was named the number one brand in the IWSR's annual Elite Brand list, moving up from number three in 2011.

With a five-year compound annual growth rate (CAGR) of 7.4% and sales in 2011 reaching 3.8m cases, Havana Club is the largest-selling brand of those which meet the IWSR's criteria. Brands must sell over 1m cases worldwide, with at least 40% of sales outside their main market to demonstrate international presence, and also maintain a CAGR of at least 5% for the last five years of growth – i.e. 2006-2011 – to demonstrate sustained growth.

Jameson's Irish whiskey was the number two Elite Brand, while Eristoff, Russian Standard and Finlandia all maintained their presence on the list published in the September issue of the IWSR Magazine.

To see full list of IWSR's Top Ten Elite Brand List, please click on link on the TMI cover letter.



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Chicago O'Hare Concession Open House attracts 200

More than 200 business owners, retailers, service providers, suppliers and Airport Concession Disadvantaged Business Enterprise (ACDBE) firms participated in a Concessions Open House at Chicago O'Hare Airport on Aug. 30.

The Concessions Open House provided a preview for the upcoming O'Hare Food & Beverage RFP that is scheduled to be advertised this winter.

Chicago Department of Aviation (CDA) officials provided information and answered questions about the different phases of the application and qualification process for the CDA Concessions Program. Speakers included representatives from the CDA, Unison Consulting; Unison and the City of Chicago Department of Procurement Services. ACDBE Concessionaire Sulaiman Rahim, co-owner of Midway Restaurant Development, Ltd., also presented at the event, providing unique insight into the particulars of operating an airport concession location.

The Concessions Open House attendees also had an opportunity to meet with representatives from the CDA, City of Chicago Department of Procurement Services, as well as master concessionaires including Areas USA, HMS Host, MAC One, OTG Management, Westfield, Concessions International, Delaware North and The Paradies Shops.

See O'Hare concessions performance information below.

O'Hare International Airport
2011 Concessions Performance
(Terminals 1, 2 and 3)

	Stores	Area (sq. ft.)	Sales (\$000)	Sales/SF
Food & Beverage	110	88,472	\$224,899	\$2,542
News & Gifts	29	18,552	\$47,163	\$2,542
Specialty Retail	28	16,312	\$32,825	\$2,012
Duty Free	4	3,159	\$25,276	\$8,001
Services	6	729	\$813	\$1,115
Total	177	127,224	\$330,976	\$2,602



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Source: Chicago Department of Aviation