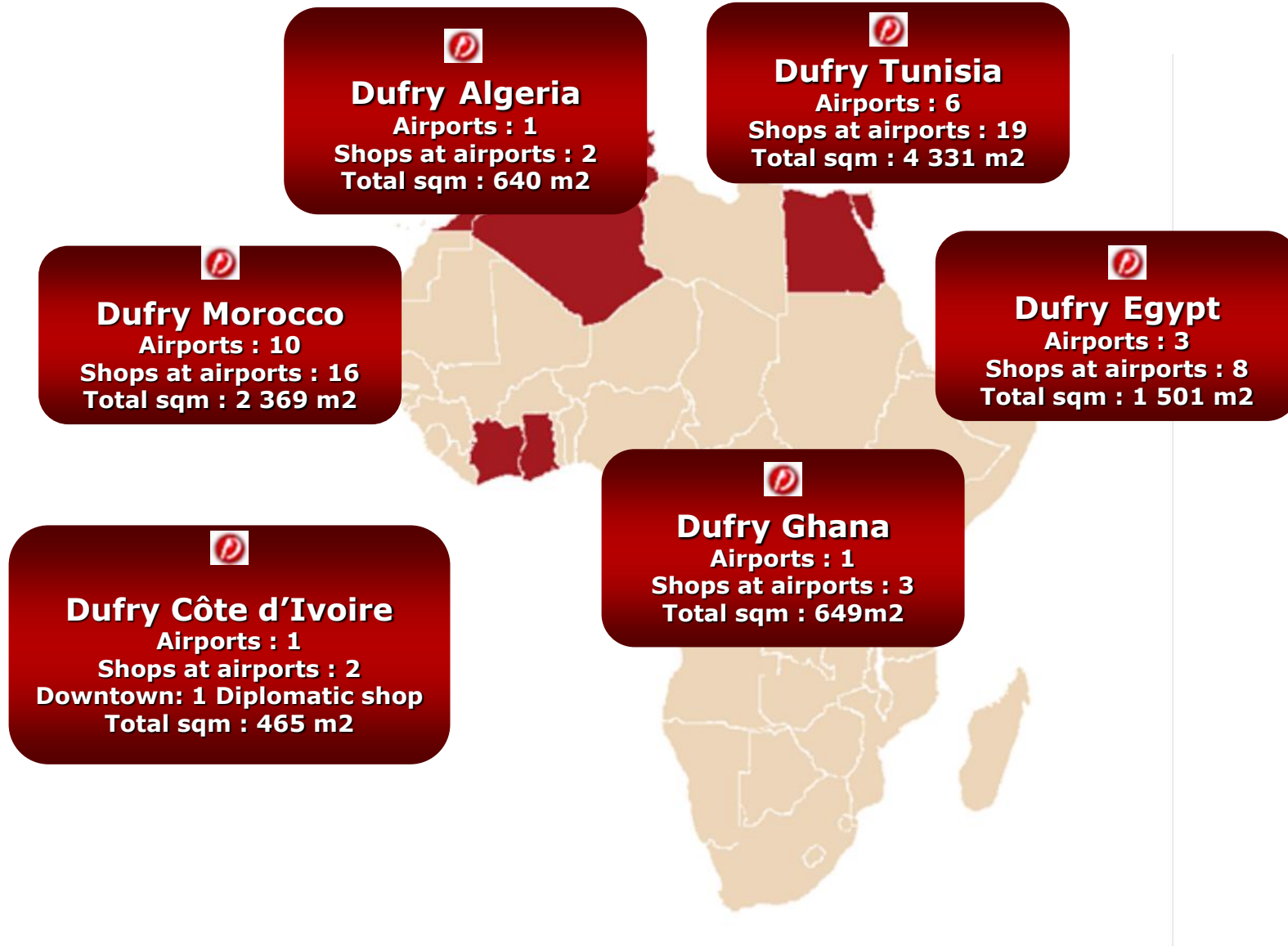




D U F R Y



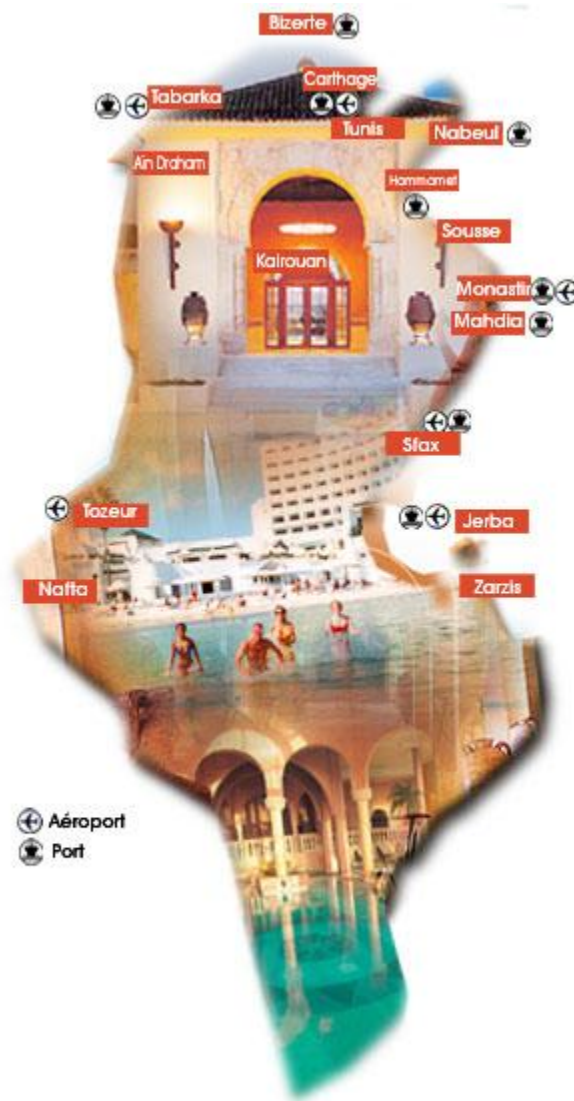
Dufry in Africa



OVERVIEW ON TOURISM INDUSTRY IN NORTH AFRICA REGION

(Where Dufry is present)

TUNISIA



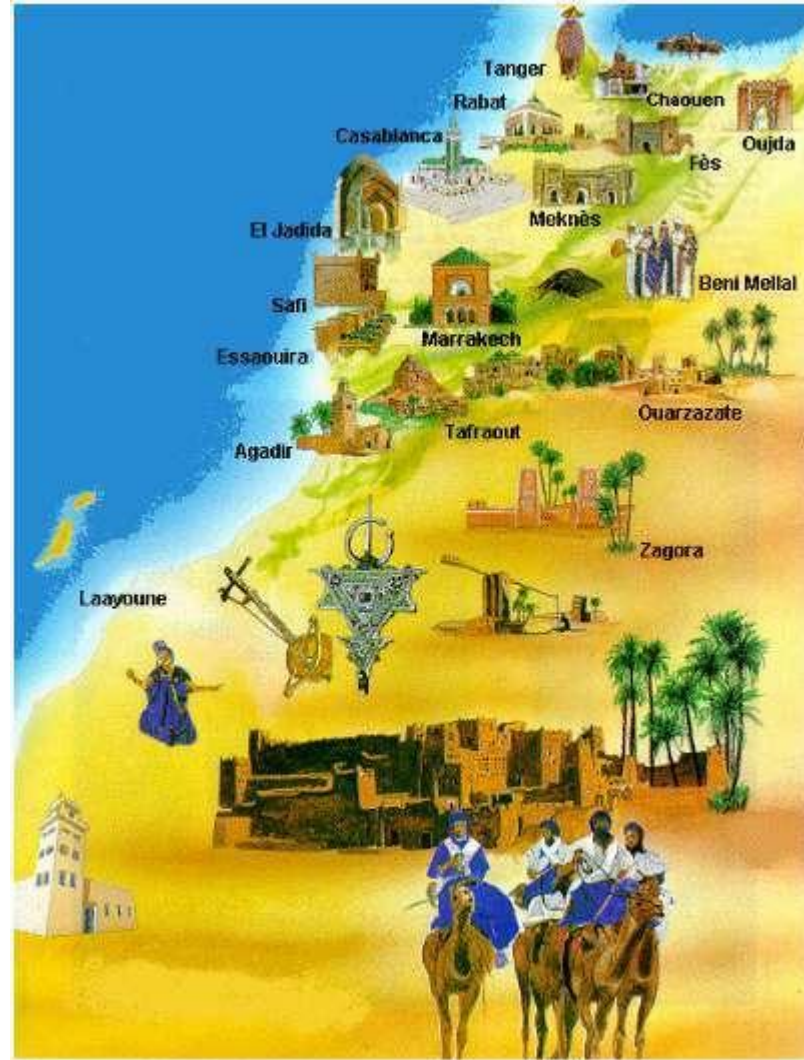
Trends

- **Many tourists decided to cancel or to postpone their travel plans due to the unrest in Tunisia in 2011.**
- **In many European countries travel warnings were issued.**
- **The aggregate number of overnight hotel stays in the first three months of 2012 is still 22.2% less than in the same period of 2010.**

Perspectives

- **The tourism authorities in Tunisia continue to invest heavily in marketing and advertising in France and other key countries in order to give assurance to potential tourists.**
- **Tourism players try to attract domestic tourists after years of neglect.**
- **The Government of Tunisia has agreed to implement an open sky policy.**

MOROCCO



Trends

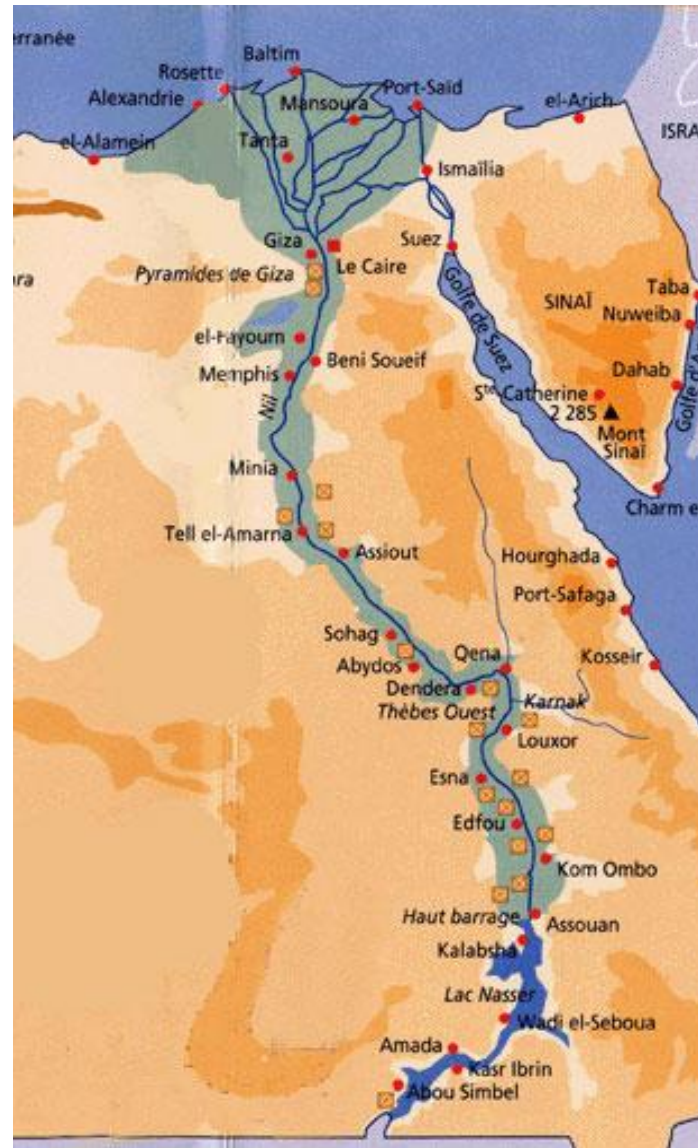
- **Growth in Morocco's tourism industry in 2011 is generally slow.**
- **The country took advantage in 2011 from the Arab Spring including Egypt and Libya, both of which were taken off the tourism map in 2011 in the Mediterranean area.**



Perspectives

- **The number of trips travelling to Morocco is expected to reach 11 million by 2016**
- **A forecast downgraded due to economic tensions in Europe, the Arab Spring and some internal political changes**
- **Morocco is nonetheless a very promising tourism destination. The government's strong commitment is to develop this industry;**
- **The country's strategic vision for growth, Vision 2020, aims to rise Morocco to one of the "top 10 destinations in the World"**

EGYPT

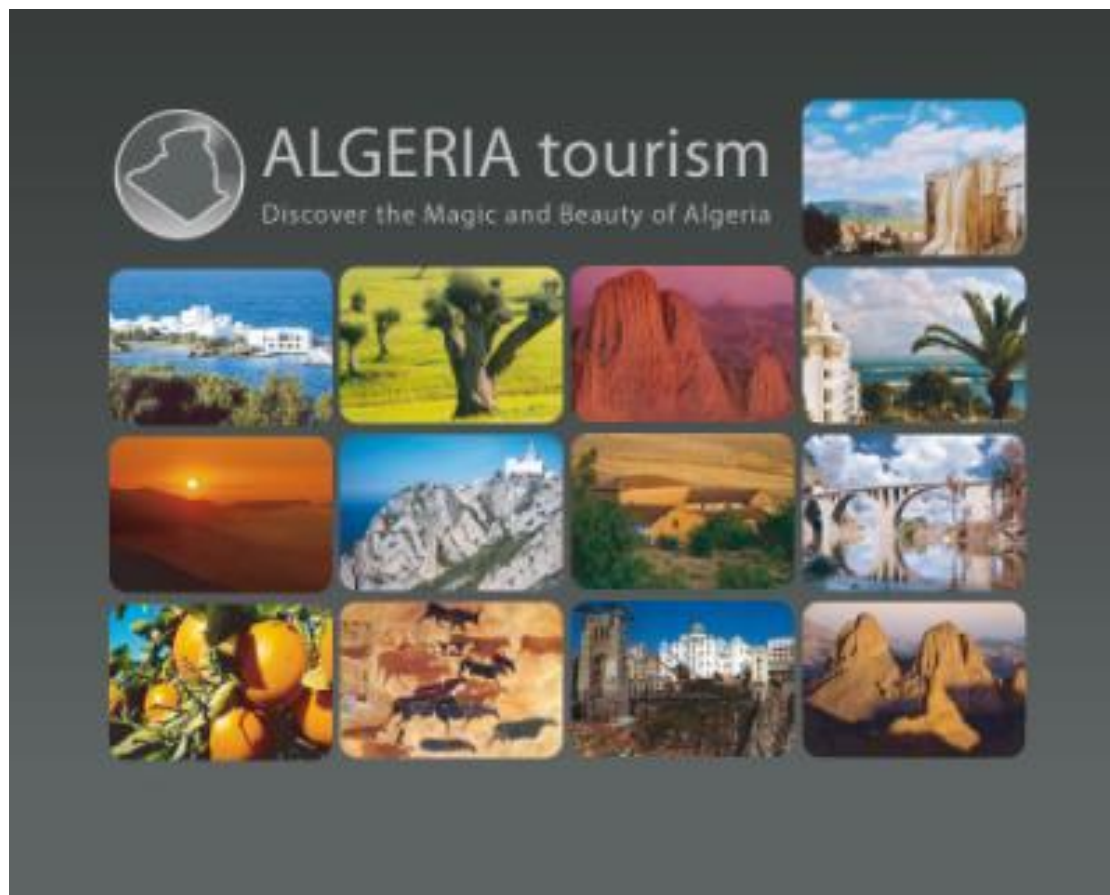


Trends

- **Impact of the Revolution : that caused a 37% decline in the number of tourists arrivals during the year 2011;**
- **Egypt's tourist attractions closed during the Revolution;**
- **Airport traffic affected and many international airlines cancelled their routes to Cairo.**
- **As a result, average prices across travel and tourism operators decreased by 50% or more throughout the country;**

Perspectives

- **The number of trips to Egypt is unlikely to return to pre-crisis levels during the forecast period.**
- **The number of arrivals is only projected to increase at an average annual rate of 5% . The total number of trips to Egypt expected to reach 11.5 million by 2016.**
- **In addition, poor economic prospects in Europe are likely to negatively impact growth in the number of arrivals from key source markets.**



Trends

- **Algeria has a large-scale tourism potential, however, the industry remains neglected and underdeveloped.**
- **2011 was a bad year for tourism, with a decline in inbound and outbound tourism alike.**

Perspectives

- **The Algerian Ministry of Transport has allocated USD 9,6 billion for the modernization of airports, railways, ports and other key transport infrastructure projects.**



KEY CATEGORIES

(KEY CATEGORIES RANKING BY OPERATION)

TUNISIA

Ranking

Product categories

1

TOBACCO

2

PERF. & COSM.

3

SPIRITS

MOROCCO

Ranking

Product categories

1

TOBACCO

2

PERF. & COSM.

3

FOOD

EGYPT

Ranking

Product categories

1

TOBACCO

2

PERF. & COSM.

3

FOOD

ALGERIA

Ranking

Product categories

1

TOBACCO

2

PERF. & COSM.

3

SPIRITS



KEY PAX NATIONALITIES

(KEY PAX NATIONALITIES RANKING BY OPERATION)

TUNISIA

Ranking	Nationalities
1	FRENCH
2	TUNISIAN
3	LIBYAN

MOROCCO

Ranking	Nationalities
1	FRENCH
2	MOROCCAN
3	BRITISH

EGYPT

Ranking	Nationalities
1	BRITISH
2	ITALIAN
3	GERMAN

ALGERIA

Ranking	Nationalities
1	ALGERIAN
2	FRENCH
3	TUNISIAN



Our commercial & marketing models

Our success is based on understanding the passengers needs and to design tailored actions aligned with their expectations to guarantee their

We have developed the following analysis ...

Market research

Mystery Shopper

On-site visits

Pricing analysis

Mirror airports

Internal analysis



... in order to get a deep understanding regarding the passengers motivations...

... to enter in the store

... to buy

... to buy more and to come back



1

Communication

Advertising campaigns

Actions to increase footfall in stores *

2

Promotion

Actions to increase conversion

Actions to increase average ticket * *

Actions to empower repetition

3

Customer Service

Actions to ensure clients satisfaction * * *



* Actions to increase footfall in stores

New technologies in the duty free shops

The application of the latest technology will generate curiosity, traffic into the stores, improved services and enhance the shopping experience.

- Virtual shopping wall
- State of art spectacular promotional arena
- I-phone applications
- Multi-lingual Website (www.dufry.com)
- Virtual sales associates – Holograms



- **Head Count monitors**
- **3D Digital Categories screens**
- **Free standing ordering units with I-pad - Tablet technology**
- **Magic Mirrors**
- **Customer satisfaction rating screens**
- **Social Media**
- **Geo-location interaction**
- **QR codes on all marketing**

Click & Collect in-store
Pre-order service



VIP delivery service
To your lounge or gate



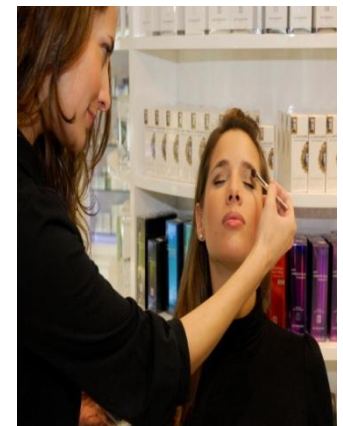
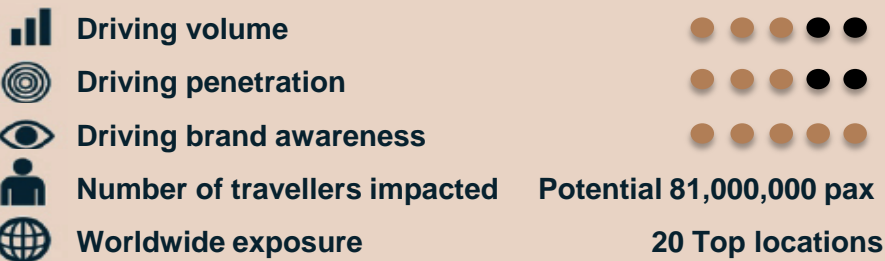
MAKE UP ARTISTS & ESTHETICIANS SIMPLY PROFESSIONAL

Benefits

- Brand visibility
- Customer exposure to product
- Feedback: Word of mouth
- Increased sales

Package

- Dedicated space in the store
- Personalized shopping advisor
- Representation at top 20 stores worldwide










GLOBAL PROMOTION HIGHLY VISIBLE

Benefits

- Mass exposure of product – 44 countries
 - Large Advertising campaign
 - Strong sales increase
- Products promoted in Dufry brochure

Package

- Runs in all locations – 3 times per year
 - Professionally marketed gondolas, entrance banners, security gates and light-boxes, Hostesses handing out leaflets

	Driving volume	● ● ● ● ●
	Driving penetration	● ● ● ● ●
	Driving brand awareness	● ● ● ● ●
	Number of travellers impacted	1.7 billion potential pax
	Worldwide exposure	Locations in 44 countries





*** * * Actions to ensure clients satisfaction**

Customer service

We are pioneers in offering an exclusive customer service that ensures passengers satisfaction and a full shopping experience

Our goal

To ensure a 5 Stars Service in each store from the Dufry Group as well as a high level buying experience according to the Dufry standards



*** Actions to ensure clients satisfaction

Customer service

Actions

A pioneer Customer Service department

- Pioneer in industry: a personalized customer service in the Travel Retail industry, available 24h per day, 7 days per week, 365 days per year, from everywhere in the world.
- To guarantee 100% client satisfaction: “Replaceable, Refundable or Exchangeable”

We guarantee your satisfaction




Closer to you

- ✓ We REPLACE
- ✓ We REFUND
- ✓ We EXCHANGE

 e-mail
contactus@dufry.com

 web
click to call/web chat/webmail

 toll-free phone
available toll-free customer service numbers.



*** Actions to ensure clients satisfaction

Customer service

Actions

Instant customers satisfaction surveys

- Satisfaction surveys are carried out at the purchasing moment, which enables us to get direct information regarding the levels of service and the clients satisfaction

We guarantee your satisfaction




Closer to you

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- ✓ We REFUND
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*** Actions to ensure clients satisfaction

Customer service

Actions

Gift wrapping service

- 20% of passenger that buy at the airport stores are looking for gifts
- We want clients to use this free service and come back to the Dufry stores in a regular way because of this reason, generating an opportunity of loyalty through the increase of current satisfaction

We guarantee your satisfaction




Closer to you

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- ✓ We REFUND
- ✓ We EXCHANGE

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click to call/web chat/webmail

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available toll-free customer service numbers.



KEY GROWTH DRIVERS

- **Political and social stability in the region ;**
- **End or decrease of the European economic crisis ;**
- **New kinds of tourism (cultural, medical, saharan...);**
- **“Open Sky” in the region.**
- **New communication technologies and advertising actions: “what’s new” attitude.**

شكرا

THANK YOU

MERCI