

Peace Bridge Duty Free celebrates reopening after major renovation

Peace Bridge Duty Free held the grand re-opening of its newly renovated duty free store on July 10 with a ribbon-cutting ceremony and celebration attended by dozens of partners and customers.

The updated store, which is nearly 18,000 sqf in size, took nearly a year of construction to complete. By working on one half of the store at a time, Peace Bridge Duty Free was able to remain open during the renovation.

One hour before the new Peace Bridge Duty Free store was officially re-opened, Peace Bridge Duty Free President Greg O'Hara and General Manager Jim Pearce sat down with *Travel Markets Insider* to talk about the new store and the company's vision going forward.

"We've been here 18 years and the store was due for a major renovation. We signed a new lease with the Peace Bridge two years ago and that was part of our proposal, to bring everything up to date, to bring in new product, to make the store nice and shiny," says O'Hara.

"The store was getting a little old and dated. We had upgraded various areas over the years, but it was time for a whole new concerted effort. We love how it turned out."

Construction on the store began in August 2018 following a year of planning.

"We had some real goals in mind with the new store," added Pearce.



The Peace Bridge Duty Free ribbon cutting. From left, is Peace Bridge Duty Free general manager Jim Pearce, shareholder John Marsh, MPP Wayne Gates, MP Rob Nicholson, Mayor Wayne Redekop, shareholder Barb Slipp, Duty Free president Gregory O'Hara and shareholder Harvey Rossman. Photo by Michael Pasternak.

"We wanted clear sightlines throughout the whole store and we brought all the fixture levels down. We wanted room for a relaxed shopping experience with extra-wide aisles and lots of space between fixtures. We wanted new lighting to brighten up the product. It just makes the whole store look a lot bigger," says Pearce.

"Most of our customers believe that the store is bigger, but it is just the new designs we've added.

"A lot of our customers stayed with us throughout the experience. We had the whole store jammed in one half of the space while we were building. We even had our fragrance in the wine department. Our customers are very loyal and are now coming back in droves," he said.

Pearce says the new store is just one aspect of how Peace Bridge Duty Free is updating its image.

"We invest in our website every year. It is so important to everything we do, that we update continually. The online ordering and pick-up at the store, our pre-order program, has been very successful. It is becoming more and more important," says Pearce.

The store also features digital signage with new brands on the way.

"We expanded our scotch department as well as the hot products like bourbons, Irish whiskey, and rums. We also expect some new brands to come in, although we haven't signed the contracts yet. And we are probably still the number one Crown Royal store."

Continued on page 2.

BREAKING NEWS: TOP BRANDS INTERNATIONAL BUYS NEUTRAL DUTY FREE

Panamanian company Top Brands International has just announced that it has acquired Neutral Duty Free, the largest duty free chain in Uruguay, which employs more than 500 staff across its nine locations. No financial details were released.

With this acquisition, Top Brands surges to become one of the largest duty free operators in the region, with 80 stores throughout Latin America and the Caribbean, Danny Yohoros, President of Top Brands International, details *TMI*.

Neutral, which celebrated its 30th anniversary in 2017, had been acquired by San Francisco-based private equity house JH Partners in 2011. Respected industry executive Enrique Urioste, who has been CEO since the acquisition by the fund, will remain as CEO with the company under the new ownership. The chain of stores has been rumored to be for sale for quite some time, particularly in light of the challenging economic situation affecting the border business in South America.

"This is a very strategic move for us. We see tremendous potential ahead for the Neutral stores on the border," says Yohoros. "The economy in Brazil is getting better and with the synergies that will accrue with our existing companies, we will bring greater strength and value to the business."

Yohoros points out that Top Brands had already been operating duty free shops on the border between Uruguay and Brazil in Rivera and Rio Blanco, and has the experience needed to make the business go forward.

The Neutral border stores are located across the main land access routes into Uruguay, in the cities of Artigas, Rivera, Bella Unión, Río Blanco, Aceguá and Chuy. The largest Neutral duty free store is the new 4,000 sqm super store in Melancia Mall in Rivera.

Neutral Duty Free Shop is also the exclusive franchisee of Gap Inc. for Uruguay and Paraguay. The company operates standalone duty-paid stores in the Uruguayan local market as well as branded store-in-stores at different Neutral duty free locations on the border between Uruguay and Brazil.



HANAMI

A joyous pairing of organic tart cherries, flowers and green tea



Global TR contact: Zack Boiko, zboiko@Actium.us

Peace Bridge Duty Free “transforms”

Continued from page 1.

Even though the store was under construction, Peace Bridge Duty Free reports a busy spring season and a strong start to the summer.

“It was one of the busiest Fourth of July holidays we’ve seen in a long time. Tourism remains hot in Toronto and Niagara, although we still have more Canadians than Americans. Our car traffic is probably 65% Canadian to 35% American,” says Pearce.

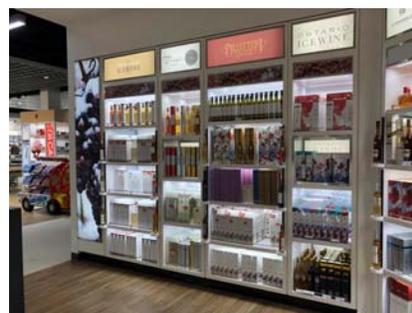
“We just had our spring bus season when bus tours from the United States come up. These customers just love ice wine. It is a huge product for most Canadian duty free stores. Our wine section has expanded and we are upgrading it with new wines.”

Both O’Hara and Pearce are excited at what the future holds for Peace Bridge Duty Free as more and more customers experience the new store.

“The store is our vision of what duty free retail is. We hope people like it and enjoy it as we take it to the next level. From a design and build standpoint we think we have,” says Pearce.



Crown Royal and Canadian Ice Wine are both important products with dedicated space in the new renovated Peace Bridge Duty Free store.



The updated duty free store features personalized back wall space as well as digital signage.



Guests at the grand re-opening party were able to sample food and drinks from key Peace Bridge Duty Free suppliers (right), both national such as the Wayne Gretzky Canadian whisky and international favorites like Whitley Neill gins, shown here with the Billy Buffalo mascot. Above: To commemorate the occasion, Franco Gabriele of Alfa Brands and Pillitteri Estates Winery presented a 5-liter limited edition bottle of Pillitteri’s Exclamation selection to the PBDF Board of Directors.



Canadian duty free sales drop in March

Canadian airport sales were down 10% in March 2019 with land border sales dropping 2.76%, according to the latest statistics provided by the Canada Border Services Agency (CBSA). However, airport sales for the first three months of the year are up 4.39% versus the January-March period in 2018. Land border sales fell 1.14% for the same three month period.

Perfume, Cosmetics, Skincare, the number one category in Canadian airport duty free stores with more than 36% of sales, was down 8.88% in March. Alcohol, the number two airport category with 20% of sales, was down 12% for the month. Tobacco, the number three airport category with 12% of sales, was down more than 6%.

Alcohol, with more than 40% of land border sales, slipped .65% in March. Tobacco (26% of sales) was down 5.26%. Perfume, Cosmetics, Skincare (14.4% of sales) was up 10% in March.

Arrivals of international visitors to Canada slowed (-1.2%) over the first three months of 2019 on a year-over-year basis, reports Destination Canada. This slowdown partly resulted from general softening inbound flows from several key international markets and from “the Easter effect” – where travelers who would have come in March are likely to delay their travel until Easter in April 2019 to take advantage of the holiday.

The CBSA says this will be the last month it provides Canadian duty free statistics since Duty Free Shop licensees are no longer required to provide a summary of sales on a monthly basis to the agency.

Pillitteri Estates Winery, official wine supplier for the Canadian Olympic Committee, releases “Team Canada” Wine



The release of the first bottles of Team Canada wine at the Pillitteri Estates Winery took place in June.

Luxottica and Scuderia Ferrari Watches race into Montreal with Aer Rianta International in cross-category initiative

Luxottica Group and Scuderia Ferrari Watches, designed, manufactured and distributed worldwide by Movado Group, Inc., have partnered with Aer Rianta International to host a traffic-stopping motor sport-themed cross-category promotion at Montréal Pierre Elliott Trudeau International Airport.

Through this collaboration, a first for all three parties, The Loop Duty Free store hosted a retail-entertainment activation coinciding with the 2019 Canadian Grand Prix. Passengers were invited to live the thrills and excitement of race-day through Scuderia Ferrari in the heart of the airport.

The activation began on June 4 and runs through July 16, 2019.

The activation was executed in the airport's largest promotional space, in the main walkway for international passengers. It showcased Ray-Ban for Scuderia Ferrari sunglasses and Scuderia Ferrari watches.

Passengers can “test-drive” a high-octane Scuderia Ferrari driving simulator. Purchases were rewarded with a Scuderia Ferrari cap and a premium fast-track to ride the simulator, jumping the queue of those waiting to “drive.”

In order to deliver a seamless cross-category experience for shoppers, all sales staff received training on both product ranges. The promotion was also hosted by dedicated promoters during peak passenger traffic periods.

Enrico Destro, Global Travel Retail Director at Luxottica, commented: “Successful cross-category activations require significant investment, close collaboration and alignment on innovation and creativity. The Scuderia Ferrari activation at Montreal Airport rose to this challenge and sets an example of a new way of working, perfectly-timed to leverage the excitement of the Formula 1 Tour and the influx of international fans. We are pleased to have written another chapter in the Ray-Ban for Scuderia Ferrari story in travel retail and look forward to more activities along the 2019 Grand Prix circuit.”

Ricardo Cesar Martins, VP/GM at Movado Group, adds: “Our main priority in activations like this is to constantly excite our consumers with new product offerings and thrilling experiences that are meaningful and relevant to the brand's DNA. This simulator activation brought the racing to our

Pillitteri Estates Winery, which entered into a partnership with the Canadian Olympic Team and the Canadian Olympic Committee to produce a special branded Pillitteri wine for Team Canada and the “*be Olympic*” movement, held a special ceremony last month for the release of the “Team Canada” wine.

Pillitteri and the Canadian Olympic Committee worked closely to develop a brand label for the “*Team Canada*” red and white wines that are now ready, with an Icewine to follow, said the company statement.

“*Team Canada*” wines were released in June at the Pillitteri winery retail store, provincial liquor boards across Canada, private wine retailers, grocery stores, Canadian Duty Free stores and in restaurants and bars across Canada.

To support the Canadian Olympic athletes, \$1.00 from the sale of each bottle of “*Team Canada*” wine is donated directly to the Canadian Olympic Foundation,

As part of the partnership, Pillitteri is also the exclusive Wine Partner of the Canadian Olympic Team, as well as the exclusive wine supplier to Canada Olympic House for the next 3 Olympic Games: Tokyo 2020, Beijing 2022 and Paris 2024.

Family owned and operated, Pillitteri Estates Winery, was founded in 1993, and is situated on 175 acres of vineyards in the Niagara-on-the-Lake region of Ontario, Canada. Pillitteri is the world's largest Estate producer of Icewine, currently exporting to 35 countries, and has won over 1000 international and domestic awards.

It is represented in travel retail by Alfa Brands, Inc.



Panoramic view of the Luxottica/Scuderia Ferrari Grand Prix activation at Montréal Pierre Elliott Trudeau International Airport with ARI-NA.

consumers, allowing us to expand our audience and bring our engagement to a higher level. The timing of this activation ran around the Father's Day period and gave us the opportunity to showcase our Father & Son Giftset, commemorating the passion a father and son share for racing. As a result, the giftset became our top selling product throughout the activation. In our watch collections we must continue to portray true passion and love for racing with innovative cutting-edge design.”

Jackie McDonagh, General Manager, Aer Rianta International (ARI) North America, commented: “We are delighted to partner with Luxottica, Movado Group Inc. and Ferrari on this first ever joint brand and cross-category promotion, and to bring this experiential and interactive promotion to The Loop Duty Free in the YUL Montreal Airport. We have received extremely positive feedback from passengers and this reflection in the airport of what is happening downtown has translated to excellent sales.”

BY THE NUMBERS

Travel Trends Index: U.S. domestic, international demand expected to drag over next six months

Travel to and within the U.S. grew 3.2% year-over-year in May, according to the U.S. Travel Association's latest Travel Trends Index (TTI). This marks the industry's 113th straight month of overall expansion.

While this is up slightly from April's 3.0% overall growth, the Leading Travel Index (LTI) predicts travel growth will soften through November 2019 across all travel segments.

The USTA reports that international travel grew only 1.2% in May, following three months of wide fluctuations due to the timing

of Easter, which has historically been a peak travel time for visitors to the U.S.

Over the next six months, the LTI predicts international travel growth will slow to just 0.4%.

David Huether, U.S. Travel Sr Vice President for Research, cites the strong dollar and lingering trade tensions for sluggish growth for international inbound travel.

On the domestic travel side, travel demand increased 3.6% in May, buoyed by growth in both the business travel and leisure travel segments.

The LTI predicts domestic tra-

vel growth will expand only 2.0% through November, with leisure travel outpacing business travel growth.

Vacation intentions from January-April 2019 registered above 2018 levels over the same period, and forward-looking bookings and searches support predictions of continued, albeit moderate, growth.

The TTI is prepared for U.S. Travel by the research firm Oxford Economics. The TTI is based on public- and private-sector source data which are subject to revision by the source agency.

IATA: air passenger demand stays solid but growth trend slows

Global passenger traffic results for May rose 4.5% compared to the same month in 2018, reports the International Air Transport Association (IATA) in its latest analysis. This was in line with the revised April traffic growth of 4.4% and above the recent 3.1% year-on-year growth recorded in March. However, growth remains below the 20-year average growth rate of around 5.5%.

International Passenger Markets

International traffic demand rose 4.3% in May over the year-ago period, which was down from 5.1% growth in April.

All regions recorded growth, but the airlines in **Latin America** delivered the strongest growth, up a strong 6.7% compared to the same month last year. This rate was well up from 5.1% growth in April.

North American airlines also delivered a strong performance, up 4.8% compared to May 2018. Nevertheless, this is a slowdown from 5.6% annual growth in April. The comparatively strong domestic

economy, and US dollar is helping to offset any trade-related softening in international travel, said IATA.

European carriers' May demand climbed 5.4% over May 2018, down from the 7.7% YOY growth recorded in April. **Asia-Pacific** traffic rose 4.0% in May compared to the year-ago period, an improvement over the 2.9% increase in April. This is the second consecutive monthly increase in demand, but it still represents a softening compared to the double-digit growth rates over the past few years. The US-China trade tensions continue to weigh upon growth in the region, said IATA.

Middle East carriers' May traffic growth decelerated to 0.8% compared to a year ago, from 3.3% annual growth recorded in April. This partly reflects the impact of the structural changes that are underway in the industry in the region. **African** airlines posted a 2.1% traffic rise in May compared to the year-ago period, which was up from just 1.1% growth in April.

Natalie's Candy Jar opens new location at Orlando Inter'l Airport

Natalie's Candy Jar has opened a new location at Orlando International in the Main Terminal, as it continues to expand its presence at MCO with a refreshed new look.

The new store reflects Natalie's new design that the company says provides a sophisticated, fun atmosphere well-suited for the traveling public, reports Natalie's Managing Partner, Cielo Taub.

Natalie's features more than 500 varieties of conventional, proprietary, nostalgic and hard-to-find candies, high-end chocolates and candy-related gift items, as well as sugar-free treats, nuts and trail mixes.

Natalie's Candy Jar, an ACDBE-certified company, also has locations at DFW International,



San Antonio International, George Bush Intercontinental, Indianapolis International, San Francisco International, Boston Logan International, and Cincinnati/Northern KY International airports.

Nigel Keal elected new President of ETRC



The European Travel Retail Confederation has elected Nigel Keal as President. Keal, Global Commercial Director for Dufry, has been a member of the Managing Board of ETRC since 2017. He replaces Frank O'Connell, who stepped down as ETRC President but continues in his role as President of the Duty Free World Council (DFWC).

Keal comments: "I am delighted to have been elected President of ETRC and humbled by the trust ETRC members have shown... The breadth and scale of the work currently being undertaken by ETRC is remarkable. We are actively engaging the EU and key European countries on a number of campaigns, particularly on Brexit ahead of negotiations on the future EU-UK relationship.

"Also I would like to sincerely pay tribute to my predecessors, especially Frank, who has given much of his career to ETRC and its forerunners. Frank has been a true industry stalwart, a man who has given so much for so long. I am pleased he agreed to stay on the Managing Board of ETRC for another six months to facilitate a smooth transition."

Frank O'Connell said: "As a former President of ETRC over many years I know how important it is for the travel retail industry working together towards common goals. This past year has seen a number of challenges arise for the travel retail industry, particularly in relation to Brexit.

ETRC is committed to tackling these challenges, and to provide some clarity for our members and for the industry at large. Nigel has the experience and know-how to continue driving these issues as the new President of ETRC."

Lancôme unveils new feminine fragrance Idôle

Lancôme has unveiled a new feminine fragrance, Idôle, which Françoise Lehmann, Lancôme Global Brand President, said is created for a new generation of women.

American actress, singer, and fashion authority Zendaya Coleman is the face of the new fragrance. The former Disney Channel-star was announced as a Lancôme ambassador last March.

Idôle, a musky chypre floral fragrance, was created by three female perfumers: Shyamala Maisondieu, Adriana Medina and Nadège Le Garlantezec.

The juice features a sustainably sourced Isparta Rose Petal Essence from Turkey, which is exclusively made for Lancôme, as well as a Centifolia Rose grown in France, along with notes of bergamot, accords of pear, India Jasmine Grandiflorum. It also contains a new “clean and glow” accord, says the company.

The Idôle bottle was designed by architect and industrial designer Chafik Gsmi, using technical



advances that allow it to be just 15mm thick, one of the thinnest in the world.

“Idôle is a strategic launch for Lancôme and we are delighted to present it with Zendaya to the world,” commented Lehmann.

According to *Women’s Wear Daily*, the plan is to turn Idôle into another pillar for Lancôme.

Idôle will be in stores as of August 22. Available in several refillable formats (25 ml, 50 ml and 75 ml), select points of sale will offer an Idôle perfume fountain – “La Recharge”.



L’Oréal in talks to acquire Mugler and Azzaro from the Clarins Group

L’Oréal has confirmed that it has entered into exclusive negotiation with the Clarins Group to acquire the brands Mugler and Azzaro. The Clarins Group develops these two houses globally.

The acquisition under discussion will remain subject to consultation with employee representatives and the approval of the regulatory authorities. It should be completed in the course of 2019, said the L’Oréal statement.

Cyril Chapuy, President L’Oréal Luxe, said: “The perfume category is at the heart of our global strategy for growth at L’Oréal Luxe. In this context, we would be thrilled to welcome Mugler and Azzaro: these signatures, with a long history in fashion and olfaction, would perfectly complete our portfolio of brands.”



Thierry Mugler’s iconic Angel perfume in its Star flacon.

The Estée Lauder Companies promotes Sara E. Moss to newly created role of Vice Chairman

The Estée Lauder Companies continues to build on its legacy as a family company founded by a woman, for women, by promoting Sara E. Moss to the newly created role of Vice Chairman. Moss is currently Executive Vice President and General Counsel and will continue in her role until a successor is named at a later date.

She will jointly report to William P. Lauder, Executive Chairman, and Fabrizio Freda, President and Chief Executive Officer.

In this role, Moss will focus on advisory and liaison roles with executive management, the Board of Directors and the Lauder family and will work collaboratively with senior leaders across the organization to drive the company’s global programs to develop women as exceptional leaders, as well as women’s focused initiatives.

Before joining ELC, Moss had



a distinguished career as a lawyer and leader.

She was one of the first women litigators at a Wall Street law firm, part of the first small group of women federal prosecutors in the Criminal Division of the U.S. Attorney’s Office for the Southern District of New York, and one of the first few women General Counsel in the Fortune 500.

Could EU-Mercosur trade pact impact duty free?

The “historic” trade agreement between the European Union and the countries in Mercosur-- Brazil, Argentina, Paraguay and Uruguay – announced earlier this month, could take up to three years to come into force, as it depends on approvals by lawmakers of all countries involved. This is the largest trade agreement the EU has ever concluded. It will create a market of 780 million people and could save as much as \$5 billion in duties between the two trade groups, say supporters.

While it is far too premature to estimate what impact this could have on travel retail in the region, *TMI* asked industry leaders for their take on the deal.

ASUTIL Secretary General Jose Luis Donagary stresses that the trade pact is currently a political agreement between the European Union and the Mercosur. “Now the parties must write down what they have agreed to in black and white. The specifics will need to be approved by the parliaments of each country.”

Approved tariff reductions will be phased in gradually, and he expects it will be at least 3-4 years before all approvals are reached.

“In some years you may have some products that come from Europe to the Mercosur with lower taxes, so we may see more aggressive competition between duty free pricing and the domestic market. But nobody knows what is covered for sure, or how much or when it will take place.”

Neutral CEO Enrique Urioste agrees that it will take a long time for the agreement to take place, if at all. “It is a long process, nobody has a clue whether the agreement is more a political move than a real thing. Some of the countries in Europe are already expressing doubts, and Brazil is being very cautious. The big issue is how open the agreement will be, so we cannot say whether it will be good or bad if it was to go forward. Nobody knows the frame or the scope of it yet, and everyone is reading it a different way.”



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- Booking of training location and organization of the training events.
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More details can be found at
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