

CENTRAL EUROPEAN OFFICE

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Prepared by: Marion S. Wolf
Director Central Europe

MARKET INTELLIGENCE / TRENDS

German Operators Expect Growth in 2013

Tour operators in Germany generated good growth this year and are expecting moderate low growth again in 2013, according to this year's fvw dossier on the German tour operators market. Tour operator revenues increased by 7.5% to €19.3 billion in the 2011-12 tourism year (ending October 31), the 36-page dossier with figures from 58 companies showed. Customer numbers grew by 4.5% to 32.9 million. The difference was mostly due to higher prices, largely resulting from increased energy costs for flights and in hotels. In addition, sales of long-haul holidays and cruises, with higher average prices, went up, thus also influencing the figures, the fvw analysis showed.

The tour operators in the dossier cover about 80% of the total market. The German Travel Association (DRV) estimates that the overall market grew about 5% to €24.4 billion this year. This lower growth rate is due to an expected fall in sales by smaller coach holidays and holiday homes companies this year due to the poor summer weather, according to Werner Sülberg (Rewe Group), head of the DRV's market research committee.

Looking ahead to next year, German operators covered in the dossier are expecting growth of about 5% in revenues and 4% for customer numbers despite the euro-crisis and weaker economic environment. At present, bookings for the winter season are slightly ahead of last year after a slow start and early demand for next summer is good, according to tour operators.

A clear majority of firms in the survey improved their results this year. As many as 36 of the 58 firms said this year's pre-tax profits were higher than last year. Six companies had stable profits, only five said profits had dropped while 11 did not comment. Larger companies appear to have won back market share this year from smaller operators (with revenues under €60 million) who had grown strongly in recent years. The clear revenue growth winner was FTI (+26%) while TUI and Thomas Cook continued to focus on profits ahead of revenue growth. In terms of rankings, TUI remained the clear German market leader this year with revenues of €4.47 billion. Thomas Cook and Rewe Group shared second place with revenues of €3.2 billion as Cook caught up again on Rewe which grew more slowly this year. The following leading positions are unchanged, with FTI in fourth place with revenues of €1.6 billion, ahead of Alltours (€1.4 billion), Aida Cruises (€1.1 billion) and Schauinsland (€0.7 billion).

TUI Travel: Higher profits and good early bookings

TUI Travel made a record profit last year, with better underlying results in Germany, and has good advance bookings for next year. Europe's largest tour operator is benefiting from increased sales of higher-margin holidays and lower acquisition and restructuring costs. Group revenues dropped back by 2% to £14.5 billion, but the operating profit rose by 4% to £490 million and the pre-tax profit was 8% higher at £390 million, both on an underlying basis. Excluding currency effects from converting Euros and other currencies into pounds, the like-for-like operating profit was 12% higher at £526 million, according to the firm.

Results in Germany improved, although the figures were distorted by currency effects. TUI's reported revenues dropped 8% to £3.9 billion on flat customer volumes, leaving reported profits 2% lower at £87 million. On a constant currency basis, however, the underlying operating profit increased by 30%. Elsewhere, the losses in France were reduced to £47 million, Belgium profits rose to £55 million but Dutch profits fell back to £20 million.

TUI Travel's bookings have generally started well for the 2012/13 business year. Winter sales are up in the UK, the Nordics and Germany, but down heavily in France where capacity has been cut back. Early summer 2013 bookings are up by double-digit rates in the UK and Nordics and by a high single-digit rate in Germany.

Kuoni: Exit from loss-making European tour operators

Kuoni has carried out its planned withdrawal from loss-making tour operator activities in various European countries in order to improve financial results and focus on its growth businesses. The Swiss group said it has sold its businesses in three countries, will close three others and expects to exit from one more. The businesses, which have all been loss-making for several years, generate total annual turnover of approximately CHF 300 million (€250 million) and employ around 500 people.

Kuoni's tour operator activities in the Netherlands and Spain were sold to local management in MBOs as at 30 November 2012. In Russia, Megapolis Tours was acquired by the owner of Russian tour operator "Russian Express" on 30 November 2012. The approximately 250 employees in the three countries have all been taken on by the new owners.

In contrast, no sustainable solution has been found for Kuoni and Best Tours in Belgium and for the B2C online hotel platform Octopustravel. The closure of these operations has been started and business activities will cease during the first half of 2013. In Italy, short-time working hours have been introduced at Kuoni's tour operator business. All withdrawal options are still being examined here, and an exit is expected during 2013, the company said.

CEO Peter Rothwell explained: "The new focus of our tour operator portfolio has already come a long way in three months. I'm pleased that for the most part we have found sustainable solutions and preserved jobs, and that we have been able to work constructively with employee representatives. By withdrawing completely from the activities concerned, Kuoni is eliminating operational losses and concentrating on strategically relevant areas of business as a global, broad-based travel services provider."

Under its medium-term strategy, Kuoni's European tour operating activities will focus on the home Swiss market and larger markets such as Scandinavia and the UK. At the same time,

the company is expanding in emerging markets, especially in Asia, and offering more destination services and global travel services through subsidiary GTA.

SALES ACTIVITIES

Dertour Academy (December 10th – 18th, 2012):

The Dertour Academy is a training and incentive event for the tour operator's top travel agents. It provides a training platform for 576 agents and serves as the framework for presentation of the new Dertour summer programs including its new products. The Dertour Academy is very well known within the industry and is considered an invaluable training event for travel agency staff. The event was held in Dubai at Atlantis, The Palm.

With a view toward imparting product knowledge and generating a subsequent increase in sales by providing an opportunity for those attending to familiarize themselves with the destinations and tourism partners, workshops and roundtable sessions provide the agents with in-depth product insight and the skills they need to operate effectively at the counter. We conducted 30 intensive training sessions per day and had ample time during evening events to further promote our area to the 576 hand-picked agents.

As space is limited in terms of presenter slots, it was a privilege to have been selected by Dertour this year as the exclusive Florida destination. The only other Florida entity participating was Walt Disney Resort. Alberta, Canada was announced as next year's Dertour Academy venue.

Brussels Travel Expo (December 12th – 13th, 2012):

This month we participated in the Visit USA Workshop at BTEXpo in Brussels. The Visit USA Committee BeLux (Belgium & Luxembourg) pursued its cooperation with BTEXpo for this year's travel agent training workshop again, whereby the USA section enjoyed excellent exposure by virtue of its positioning at the fair. We attended this event for the second time pooling resources with SeaWorld Parks & Entertainment in a booth share. In addition, we increased our exposure by attending a networking brunch, during which we made valuable contacts with travel agents, tour operators, airlines as well as the press. BTEXpo is known as one of Belgium's most successful travel trade fairs attracting more than 4,000 travel trade professionals, meeting planners and media.

Vakantiebeurs (January 8th – 13th, 2013):

We will again participate in the Visit Florida stand at this important Dutch travel fair which attracts over 125,000 visitors from throughout the Netherlands. Of note is that Visit Florida will not be organizing a tour operator luncheon next year citing reports of reluctance by the operators to dedicate time to attend the traditional luncheon. Visit Florida has advised they will plan a separate in-country event for the Dutch tour operators at a later date.

CMT Stuttgart Super Sweepstakes (January 12th – 20th, 2013):

Known as one of Germany's largest and most important consumer shows, CMT Stuttgart attracted over 225,000 visitors this year. In addition to our joining forces with the Visit USA Committee Germany in promoting our product via brochure distribution to consumers, we will again co-sponsor the popular CMT Super Sweepstakes.

The sweepstakes will be published in a 12-page, 4-color visitor brochure (circulation 350,000) which will be distributed at 1,800 outlets throughout the State of Baden Württemberg prior to the show and among consumers visiting the fair. The sweepstakes will also be advertised in

the fair catalog (circulation 10,000) and promoted to the media. Active promotion of the CMT Super Sweepstakes started last month with the official sweepstakes website going live. More good news ...

- With Delta Air Lines sponsoring flights to our area for four (STR-TPA-STR), Holiday Autos sponsoring a rental car and two 7-night stays plus a dinner cruise in St. Pete/Clearwater, our sweepstakes prize package will be positioned as #2 of 124 behind the featured destination Australia. Our industry sponsors have also agreed to extend their donations to four pax.

Travel Expo Switzerland (January 25th – 27th, 2013):

After a great success last year, this new Swiss travel fair will be held Luzern again, one of Switzerland's most affluent regions. Geographically arranged exhibits will present destination products from Africa, Asia, Europe, North and South America, Oceania and the Arctic. 30,000 visitors are expected in addition to over 50 travel agency decision-makers and media representatives, who will be hand-picked. We were invited to participate in the North American section and have provided the organizer with an ample supply of our promotional literature for distribution at this fair.

Visit USA Seminar Switzerland (January 30th, 2013):

Registration has been completed for our attendance at this important Swiss trade event. Next year, we will join forces with Edelweiss Air in sharing our exhibit space at Switzerland's premier travel agent training seminar to be held in Zurich. The seminar's main goal is to provide the local trade with more insider knowledge as well as the needed contacts and sources of information. An estimated 400 travel agents are expected to attend this important Swiss event. Over the course of an entire day, we will participate in the seminar workshop distributing material and engaging in sales discussions with top tour operators, airlines and travel agency decision makers.

Visit USA Seminar Austria (January 31st, 2013):

Known as Austria's premier travel trade event, the Visit USA Seminar Austria will be held in Vienna and is expected to attract up to 150 agents. The format comprises an afternoon seminar with an ensuing evening event. The seminar program will include a table top marketplace and an on-stage "interview" session with each exhibitor. The Visit USA Committee Austria will again organize a post-seminar "evaluation breakfast" the following morning during which we will have the opportunity to provide feedback and discuss future planning. Registration has been completed early in order to take advantage of a discounted 'early-bird' participation fee.

ITB (March 6th – 10th, 2013):

Registration has been completed for the "world's largest tourism fair", during which three accommodations partners will join us! We will occupy 30 square meters within the Visit Florida Pavilion with Tampa Bay & Company and SeaWorld Parks & Entertainment as our co-exhibiting companies. We have again requested positioning next to Visit Orlando.

Visit Florida is in receipt of our complete exhibitor and co-exhibitor lists including contact details and desired catalog listing information. Hotel reservations forms have been distributed to VSPC staff and our co-exhibiting accommodations partners. Appointment scheduling will commence next month.

Our three accommodations partners were sent and exhibitor update including hotel reservations form for completion. Updates to be forthcoming.

Post-ITB Programs in Zurich (March 11th – 12th, 2013):

We will hold two events in Zurich following ITB:

- **Travel Agent Extravaganza – March 11th**
To be held at one of Zurich's newest venues "Aura", we shall stage an exciting evening event for travel agents and the Swiss media in cooperation with Edelweiss Air, Tampa Bay & Company, Tampa International Airport and Visit Florida. Planning will begin in January. Updates to be forthcoming.
- **Tour Operator Appreciation Dinner – March 12th**
A special appreciation dinner will be hosted by Edelweiss Air, VSPC, Tampa Bay & Company, Tampa International Airport and Visit Florida for the product management teams of Switzerland's most influential tour operators. A venue has been selected and initial documentation has been requested.
Updates to be forthcoming.

Additional Activity:

- The **Visit USA Committee BeLux** (Belgium & Luxembourg) updated their annually Travel Planner for 2013. We proofed our entry and approved all facts and figures. A total of 15,000 copies will be printed for 2013 and distributed at all major travel fairs in Belgium & Luxembourg, at airports, high-traffic public transportation stations, etc.
- We participated in the **Visit USA Committee BeLux General Assembly** on Dec. 13th. They introduced their work on a new website, which will be more dynamic and interactive. A new board was also elected.

2014: DERTOUR Country Special Mega Fam

After several months of negotiation, we are very pleased to report that we have firmly secured another DERTOUR Country Special Mega Fam for our area in combination with Orlando for May of 2014! Last hosted in 2008, we will again have the opportunity to showcase our area to 100 of DERTOUR's top travel agents, which promises to generate additional visitation increases to St. Petersburg/Clearwater in the future.

MARKETING INITIATIVES

Our efforts continued again this month in developing and completing marketing promotions and advertising programs, which included:

Tour Operators:

- CANUSA (Germany)
 - **Online "Insider Community" Campaign – July thru December**
VSPC is a participant in the tour operator's innovative "Insider Community" initiative together with a number of Florida partners. Focused on attracting the attention of repeat customers and new travelers to a destination, this platform offers a modern and versatile stage for travelers and potential customers to communicate actively about a destination, whereby emotional experiences motivate the desire to visit the destination. An introductory sequence explains contents of the platform. This includes map orientation and the selection of various topics, e.g. accommodations, attractions,

activities dining and shopping. “Insider Tips” are a key tool and are marked on the map. By mouse-over, a superscription provides information on the tip which can be clicked to view details (in text, images or videos). Insider Tips are rated by the community. Ratings are the key to winning a raffle at the conclusion of the 6-month campaign (a two-week stay in Florida). Call-to-action offers developed by Canusa were included in the platform.

At the beginning of the campaign, a special eNewsletter was distributed to Canusa’s database of 520,000 customers with follow-up newsletters during the course of the 6-month campaign in an effort to reinforce the promotional message. Website marketing (homepage and subpage banners), social media, affiliate and search engine marketing round out the communication tools. The tour operator estimates 20,000 site visits per month. We have requested a status update and are still awaiting response.

- DERTOUR (Germany)

- **“Best Places to Be” Campaign** – November 2012 – April 2013

Focused on promoting summer 2013, this campaign will consist of multi-channel communication targeting both B2C and B2B platforms.

Dispenser/Flyer: 750 travel agencies will each be sent 100 specially developed VSPC flyers along with a dispenser for placement, which will be displayed for two weeks between November and January.

Postcard Mailing: 5,000 postcards will be produced containing our imagery, logo and text which travel agents can order free of charge for use in their own mailings to clients. Planned execution: November.

Online: **Landing Page:** VSPC destination information will be included in a special landing page on Dertour’s homepage (dertour.de) for four weeks. Additional co-op partners included are Visit Orlando and SeaWorld Parks & Entertainment.

eNewsletter: VSPC will be included in an eNews blast to 200k customers. Additional co-op partners included are Visit Orlando and SeaWorld Parks & Entertainment.

Teaser: A two-column VSPC teaser will be on Dertour’s homepage (dertour.de) for two weeks in April.

Poster: A window display poster featuring VSPC imagery, logo and travel teaser will be distributed to 8,900 travel agencies.

Print Ad: Travel agencies will place ads in regional newspapers promoting VSPC. Dertour supports the agencies in this effort with an 80% cost contribution.

In addition, Dertour will support the promotion of the “Best Places To Be” campaign in the following manner:

- ◆ Double page in the USA Canada Summer 2013 catalog to introduce all participating partners and the “Best Places To Be” promotion
- ◆ Description in Dertour “News & Facts”
- ◆ Press release, communication via Dertour press office (to consumer and retail trade media)
- ◆ Advertisements in travel trade magazines (FVW, Travel One, Travel Talk, Touristik Aktuell)
- ◆ Special counter mail to all travel agencies
- ◆ Raffle on makingexperts.de (travel agent’s portal)
- ◆ Folder (DIN long, six pages) for all travel agencies
- ◆ Publishing date for the above activities: Nov/Dec 2012

- FLEX TRAVEL/TUI SUISSE (Switzerland)

- **Imagine Magazine Insertion** – December

We pooled resources with TUI/Flex Travel, Edelweiss Air and Brand USA for a 1/1 page advertorial to include our logo, imagery (as key visual) and travel teaser. Imagine Magazine is a high-end, glossy publication produced 4x/year with a circ. of 15,000 per issue. Distribution is to all Swiss International airline lounges (First, Business & Senator); 80 5-star hotels; high-end restaurants and clubs; golf & tennis

- clubs; haute coiffure; physician, attorney & notary waiting rooms; premium boutiques, jewelry & watch stores.
- **B2C eNews Blast** – January
 - VSPC destination text, logo and imagery with link to dedicated landing page on tui.ch.
 - Distribution to 80,000 customers.
 - **Travel Agent Window Display Poster** – February
 - VSPC logo, imagery and travel teasers will be included on this A1-sized poster, which is distributed to 350 travel agencies via the TUI Suisse News platform for a four-week display in storefront windows.
- FTI (Germany)
 - **Consumer Campaign 2013** – February/March
 - Visit St. Pete/Clearwater and Visit Orlando are joining forces to launch a consumer advertising campaign in Germany, which will be executed in cooperation with Visit Florida, Brand USA and tour operator, FTI Touristik. The campaign will run during the period February – March 2013 and will appear in leading news magazines, a news online portal and on digital screens in German railway stations.
 - Initial print creative has been developed and is undergoing minor adjustments; a media plan draft is in place, details are expected to be finalized next month.
 - HOTELPLAN SUISSE (Switzerland)
 - Two brands “Hotelplan” and “Travelhouse/Skytours”
 - HOTELPLAN
 - ◆ **Consumer Online Promo “Migros Ferien”** – November-February
 - Three-month online promo featuring VSPC imagery, destination description and two travel packages inclusive of airfare by Edelweiss (11/02/12-2/02/13). Founded in 1925, Migros has developed into a conglomerate of supermarkets, non-food specialty stores and online shops. Hotelplan Suisse belongs to Migros. “Migros Ferien” is an online travel shop offering exciting travel packages around the globe.
 - TRAVELHOUSE / SKYTOURS
 - ◆ **Travel Agent Storefront Window Display Poster** – February-March
 - Large storefront window display posters will be placed in 100 key Travelhouse agencies located in high volume city locations 2/11-3/17). VSPC imagery, logo and travel teaser will be included.
 - ◆ **Consumer eNews Blasts** – April & September
 - eNews blast to 65,000 consumers in German-speaking Switzerland to include VSPC imagery, logo, destination description and travel teasers.
 - KNECHT REISEN (Switzerland)
 - **2013/14 Catalog Placement** – January (circ. 55,000)
 - Two editorial pages dedicated to VSPC in the 2013/14 catalog (launch January 2013; valid April '13-March '14). Two additional VSPC product pages in the 2013/14 catalog with more accommodations, attractions, fly/drive packages.
 - **TTS Ferienwelt 1/1 Page Placement** – January
 - The TTS Group is an association of 80 Swiss travel agencies, whose official travel magazine “Ferienwelt” is distributed twice annually (fall and spring) to 600,000 customers throughout German-speaking Switzerland. Comprised of 24 pages, the piece contains a comprehensive mix of travel offers to several destinations. VSPC’s

- full page will include imagery, logo, destination text, travel offers developed by the tour operator to include Edelweiss Air flights to Tampa.
- **“Top Beaches” Flyer** – January (circ. 6,000)
 - Two-sided, full color flyer to be distributed by the tour operator at travel fairs in Bern, Luzern and Zurich attended by approx. 150,000 visitors cumulatively. VSPC imagery, logo, destination text and travel offers to be included.
 - **Website Promotion** – January-April
 - VSPC imagery with travel teaser placement on the North America page of the knecht-reisen.ch website with link to a VSPC dedicated landing page.
 - **B2B eNews and Mailing** – February
 - An electronic version of the “Top Beaches” piece will be emailed to 1,000 agencies. The printed version will also be distributed to 1,000 agencies for use in point-of-sale.
 - **B2C eNews Blast** – February
 - An electronic version of the “Top Beaches” piece will be emailed to 35,000 customers promoting special travel packages to VSPC.
- KUONI (Switzerland)
 - **Consumer eNews Blast** – January
 - To 78,100 subscribers with VSPC image banner + text hook with link to Kuoni’s website platform containing VSPC hotel offers + Edelweiss Air flights.
 - **Homepage Consumer Promo** – January
 - Image banner on footer of kuoni.ch homepage for two weeks linking to the website’s VSPC hotel offers + Edelweiss Air flights.
 - **2x Travel Agency Special Offer Flyer** – February & March
 - Flyers to depict VSPC logo, imagery and special hotel offer in combination with Edelweiss Air flight. To be displayed in 273 storefront windows; print run of 746.
 - MEIER’S WELTREISEN (Germany)
 - **Moving Transit Campaign** – February
 - A 12’x8’ area on the sides of 6 Frankfurt inner city busses will depict VSPC imagery, logo and travel teaser. Call-to-action will be the Meier’s URL. Duration will be 4 weeks. Estimated sightings: approx. 100,000.
 - NECKERMANN REISEN (Germany)
 - **RollAd Truck Campaign** – March
 - With 12,550 kilometers of motorway, Germany boasts one of the densest motorway networks in the world. 34.4 million automobile drivers spend 3-5 hours traveling the German “Autobahn” daily. This “rolling” consumer campaign entails an enticing VSPC image, logo, text hook and travel teaser being adhered to large canvases affixed to the rear of four 18-wheeler trucks for a duration of four weeks. Estimated sightings for consumers aged 18 and over: 58 million/100 trucks.
 - Together with Neckermann’s product management team, we developed a layout draft including teaser text, text hooks and image selection for this very unique campaign.
 - TUI (Germany)
 - **TLT Promotion – TUI Reisecenter Projection Screens** – January/February
 - Large projection screens depicting VSPC’s imagery, logo and special offers will be visible in 200 TUI travel agencies for four weeks (1/16-2/27). Projection screens are comprised of four or 12 panel components (depending on travel agency space). We have supplied the tour operator with all required elements in preparation for development.

TUI's North America department has been awarded only one slot for this program in 2013; thus, an excellent opportunity for a VSPC-exclusive presence, particularly since this B2B platform is strongly coveted by destination partners around the globe.

- **1/1 pg Advertorial in TUI News Magazine** – February
TUI News is the tour operator's B2B publication distributed to 11,000 agencies (2/07). VSPC will be featured exclusively with imagery, logo and product news text.
- **3/1 pg Advertorial in TUIfly and Welcome! Magazines** – March-June
Magazine distribution on board TUIfly fleet of 22 aircraft with 450k passengers/month and via direct mail to TUI customers. Welcome! Magazine is a publication for 'World of TUI' credit card holders, i.e. affluent customers who travel more than average. Readership for both publications combined is 1.8-2 million. Both are produced 4x/year. Insertion will be launched March 21st and run for three months until June 21st. VSPC will be the only U.S. destination featured which gives us very unique exposure. Others include Croatia, Gran Canaria, Greece, Indonesia, Rome and Turkey.

Travel Trade/Consumer Publications:

- FVW's "Fit for USA" eLearning Program (Germany) – circ. 30,860 *Trade*
 - **Online travel agent training campaign** from October 2012 – September 2013
"Fit for USA" is an eLearning course developed by the FVW Mediengruppe (publishers of travel trade magazines) and is endorsed by the Visit USA Committee Germany and Brand USA.
The 2012 program produced excellent results: 3,003 registered users, over 19,000 unique visitors and close to 1.2 million page impressions.
Now in its second year, "Fit for USA" is an independent, online training program designed to increase tourism arrivals to the USA and includes individual course units covering 6 to 8 pages of subject matter for travel agents to read at their leisure. Each course unit ends with a knowledge test. Agents who successfully complete all course units and tests receive a "Fit for USA Specialist" diploma.
The program will again be promoted frequently through advertisements in the travel trade magazines FVW (circ. 32,000 biweekly) and Travel Talk (circ. 31,000 biweekly) as well as on the respective websites: fvw.de (150,000 PIs/mth) and traveltalk.de (200,000 PIs/mth). The eLearning program will be online for 12 months with sweepstakes included at regular intervals. Special prizes such as hotel stays or flight tickets will be promoted additionally with images, logos and descriptive content.
Having supplied the editor with comprehensive information in preparation for the development of our VSPC training course including texts, imagery and logo last month, we approved all content and layouts. In addition, a special VSPC banner will be produced for placement on the eLearning website on a rotational basis, for which we provided applicable creative this month.
- COMMUNIGAYTE (GLBT) (Germany) *Consumer*
 - **"Rainbow Reporter" Promotion**
Communigayte is a GLBT marketing agency in Germany with whom we have worked very successfully in the past, conducting various marketing initiatives in cooperation with Visit Orlando. This year, we'll be working on the "Rainbow Reporter" project again in cooperation with Visit Orlando.

Program Overview:

1. **Acquisition/Application Phase** – January-March
Placement on queer.de and will build excitement/hype for the destination.
Coverage will include:
 - 1 article per destination - reach 10,000 contacts
 - 3 months of banners - reach 250,000 contacts
 - 1 eNewsletter to 18,000 contactsPlus 2 months of banners via Publigayte (Inqueery, Hinner, Leo) - reach 125,000 contacts
 - 1 eNewsletter to 10,000 contacts and
 - 2 months of banners on Schwulissimo – reach 200,000 contacts
 - plus 1 eNewsletter to 30,000 contacts
2. **Announcement of Winner** – April
Will include ‘winner announcement’ article - reach 10,000 contacts
3. **Depth of Reporting Phase** – September
Daily blog written by the Rainbow Reporter during his sojourn in the destination.
 - Blog reach 400,000 contacts

Total reach for the project: 1,053,000 contacts.

This month we concentrated on securing accommodations for the Rainbow Reporter who will visit our area September 15-19, 2013. We are most grateful to our accommodations partners for sponsoring housing!

- Airline and car rental partners are also being secured.

- NATIONAL GEOGRAPHIC (Germany) – circ. 99,250 *Consumer*
 - **“Das Erbe Unserer Welt” Special Collector’s Salvador Dalí Edition** – May
5-pg advertorial + 1-pg ad in the special collector’s edition of “Das Erbe unserer Welt” (Heritage of our World). Produced twice a year (May & November), the publication focuses on the world’s history and heritage, with arts, culture and travel the main topics. The May 2013 edition will be known as the Dalí special collector’s edition, with the great artist depicted on the cover. The editorial feature will contain descriptions of his works and talents.
The special collector’s edition is a gift to National Geographic Germany subscribers and is poly bagged alongside the regular magazine.
- TRAVEL INSIDE (Switzerland) – circ. 8,750 *Trade*
 - **1 page, 4c advertorial** in the USA Supplement Issue 1/27/2013
In conjunction with this year’s Visit USA Seminar on January 30th, we secured placement of a one page advertorial for VSPC together with Edelweiss Air to promote their Zurich-Tampa flight. We have submitted all elements required for graphic development. Layout has been received and approved.
Known as Switzerland’s leading travel trade magazine, TI is tailored to the needs of travel professionals combining competent reporting on relevant tourism industry subjects with trend and development reports, analyses and comments from the experts.
Pub frequency: Weekly
- TIP – Travel Industry Professional (Austria) – circ. 10,500 *Trade*
 - **½ page 4c advertorial** in the USA Supplement Issue 1/30/2012
Based on last year’s success, the publisher will again produce a special USA supplement for distribution in conjunction with the Visit USA Seminar to be held on

February 1st, with an overrun of 16,000 copies for additional distribution at travel trade outlets. Austrian travel agencies may also order additional issues free of charge to utilize in POS and mailings to their customers.

We provided the publisher with all materials need for layout development; layout to be forthcoming. Our area will be featured with logo, images and up-to-date destination information.

Profi Reisen is the publisher of Austria's leading travel trade and tourism industry publication TIP, which targets travel agency decision makers and counter staff alike and is known for its precise reporting of current events, insider tips and background information.

Pub frequency: Weekly

- USA Guide of Visit USA (Germany) – circ. 15,000 *Consumer/Trade*
 - **1 page, 4c advertorial**

The Visit USA Committee Germany is producing a 48-page USA Guide featuring general information of all 50 U.S. states. The guide will be distributed at travel fairs, in the U.S. embassy and other U.S. related locations. VSPC will be featured with a full page advertorial in this comprehensive book. America Journal will be the publisher for this piece and has been provided with all necessary materials such as images, logos and texts.

Online Aggregators:

- ASNM New Media AG Newsletter (Germany) – 740,000 German subscribers *Trade*
 - **Florida Newsletter Campaign** – Nov. 29 – Dec. 12, 2012 and Feb 7-20, 2013

St. Petersburg/Clearwater will be part of a Florida eNewsletter campaign featuring two eNewsletters on up to 12 online travel portals with a total of 740,000 subscribers. In addition, the news will be integrated repeatedly into the search engine optimized news portals of flugprofis.de as well as being posted on all available Facebook sites with approx. 20,000 “Likes”. We provided the publisher with our logo, images and texts for graphic development. This initiative is being conducted in cooperation with Naples, Panama City, Visit Florida and Alamo.
- Travelzoo Europe – 1.3 million German subscribers *Consumer*
 - **eNews Blast** – November/December 2012

November 14th we launched an eNews blast to 1.3 million German Travelzoo subscribers. The eNews contained our imagery and logo along with several travel teasers to our area. In addition, special buttons for topics such as arts & culture, beaches & nature will be included and linked to applicable comprehensive content which will remain online for four weeks. A tabulation of final results is expected in January.

Due to Travelzoo Germany's special agreement with Brand USA, we were able to leverage Brand USA monies for this campaign – long before Germany is officially phased into Brand USA funding.

The complete FY 2012/13 advertising plan has been submitted to HQ.

Public Relations:

Kaus Media Services - VSPC's German PR Agency

This month saw us assisting the agency with the following projects:

- **Press release December:** Provided content ideas, proofread and corrected.
- **Winner of "Radio Group" travel broadcast including sweepstakes:** We assisted the winner by contacting the sponsoring hotel to get a gift certificate extension.

All activities, projects and programs described herein have been duly completed as described.