

CENTRAL EUROPEAN OFFICE

M A R C H 2013

Prepared by: Marion S. Wolf
Director Central Europe

MARKET INTELLIGENCE / TRENDS

Positive Outlook: Germany Packs its Suitcases

2013 promises to be a record year for outbound travel from Europe's most important tourism market, according to its national travel association and tour operators. Germans will take more holidays than ever this year, according to the German Travel Association (DRV) and leading tour operators. The country's outbound travel market is poised for solid single-digit growth with good demand for most destinations.

DRV expects German holiday sales to grow 3%-4% in 2013, which is "a conservative estimate", according to association president Jürgen Büchy. "Germans are sitting on their packed suitcases," he said. Büchy's optimism is based on high single-digit sales growth for the winter season combined with healthy early bookings for summer 2013.

In terms of specific destinations, Spain and Turkey are selling well, while Greece is making a strong comeback, according to DRV, although Egypt is still struggling. Sales are particularly strong for luxury holidays, city trips, health and beach holidays as well as cruises.

DRV has also issued final figures for the German tourism market in 2012, showing a 5.5% rise in tour operator sales to 24.4 billion Euros. Sales of medium-haul packages grew by 8.5% while long-haul trips increased by 2.5% and overland destinations rose 1%.

Market research company GfK also predicts good growth for the German outbound market in 2013 after a 6% rise to 100 million trips last year. GfK expects Germans to spend 4%-6% on holidays this summer. In 2012, Germans spent an average of 1,051 Euros per person, a 6% increase over 2011.

The United Greats of America

Major tourist hotspots in the USA smashed all records in 2012, thanks especially to a surge in visitors from Latin countries. Germany also made a steady contribution in locations such as New York and Florida.

The good times are rolling for the USA as international visitors continue to flock to its top tourist locations. Fears that the Eurozone crisis would push some of its main overseas markets into decline in 2012 were not realized as arrivals continued to increase in Florida, New York and California. However, growth was fuelled largely from source markets outside

Europe. Latin American countries such as Brazil and Argentina made great strides in particular, along with China.

“We had a very exciting 2012, with a record-breaking 89.3 million domestic and international visitors, up around four million on the previous year,” said Visit Florida sales and marketing Vice President Eileen Forrow. “What was particularly good was that international business was up, so it’s been a banner year for us.”

New York experienced a similar story, thanks to a record-breaking 52 million arrivals. The figures included a 4% jump in international travelers to 11 million, with Brazil once again recording one of the biggest increases at 15%. German visitors to New York rose 4% to 605,000, although the UK, which remains the city’s biggest market, was flat at 1.4 million arrivals. California also proved popular for Germans in 2012, accounting for around 450,000 visitors. Germany is California’s sixth-largest market, but its travelers stay the longest, spending an average of 9.4 nights in the state.

Tourism Surfing on Bookings Wave

German consumers continued booking strongly in February, according to the latest market surveys and sales figures from tour operators. Travel agencies in Germany increased their tourism sales by 12% last month, the latest GfK monthly survey of 1,200 agencies found. The double-digit growth, however, is not a big surprise as the previous year’s figure was impacted by the immediate aftermath of the Costa Concordia disaster and the situation in North Africa. Late winter sales were good last month with a 6% rise in revenues, leaving cumulated winter season sales up by 4.5%, the GfK survey showed.

Summer sales soared with a 15% increase on the figure 12 months ago, and there is now a cumulated 6.3% increase in summer 2013 sales. All departure months are showing increases apart from July, with double-digit growth for May, August and October. Early bookers were very active, with 23% of last month’s revenues generated by bookings for September / October 2013 or winter 2013/14 holidays.

German tour operators also released positive booking trend figures just prior to and at ITB Berlin this month. Market leader TUI, for example, has a 3% rise in summer 2013 sales revenues. Majorca is selling well with an 8% rise in bookings and Greece is recovering with a 4% rise on last year’s lower levels. Germany managing director Christian Clemens said TUI expected to profit “above average” from the good demand this year which should generate overall market growth compared to 2012. Bookings for winter 2012/13 are 4% higher, driven by a 30% boom in long-haul sales.

Rewe’s tour operators have a combined 3% rise in bookings for this summer after a boom since late January. The Balearic Islands and Turkey are seeing good bookings and Greece is recovering, while long-haul destinations are generally selling well. Tourism CEO Norbert Fiebig predicted: “2013 will be a good travel year. Those destinations which offer good value for money will again be the winners.”

SALES ACTIVITIES

ITB (March 6th – 10th, 2013):

After several months of preparation, we attended the world's largest tourism fair held in Berlin. Excerpt from the organizer's closing report:

Some 110,000 trade visitors, including 43% from outside Germany, came to this year's show. The number of exhibitors topped the 10,000 level with a total of 10,086 exhibitors from 188 countries. All told, exhibitors reported sealing business deals worth close to €6 billion during quality business talks in Berlin. The main innovation this year was the launch of direct sales to consumers on the public days. Over 60,000 people came to ITB on the Saturday and Sunday to inform themselves about tourism products and services. A poll among visitors revealed that one in three intended to book a trip, Messe Berlin said. Around 6,000 accredited journalists from 80 countries and some 250 bloggers reported on events at ITB Berlin.

We occupied 30 square meters within the Visit Florida Pavilion with Tampa Bay & Company and SeaWorld Parks & Entertainment as our co-exhibiting companies. Three VSPC hotel partners also joined us. Over 40 appointments were conducted with tour operators, airline partners and other prominent and influential tourism providers from Germany, Austria, Switzerland and the Netherlands, tying in our VSPC industry partners as applicable. The majority of our tour operators reported positive developments for business to the U.S. with bookings up by double digit percentage points compared to the same time last year, despite the U.S. Dollar's strength relative to the Euro at the onset of the year. With the U.S. Dollar currently losing strength slightly relative to the Euro, the outlook is projected as favorable. In fact, some tour operators indicated that 2013 was expected to become an excellent year for travel to the United States.

A further highlight this year was our attendance at the 20th Annual SENSES Awards. 200 special guests from luxury resorts, film, TV and aristocracy gathered in the historic Imperial Hall at Postdamer Platz during a spectacular gala dinner event to celebrate the winners in several categories. We are very proud that SENSES Award category "Best Beach Resort" was bestowed upon one of our very own ... the Sheraton Sand Key Resort – congratulations!

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

We held two events in Zurich following ITB:

➤ *Travel Agent Extravaganza – March 11th*

Held at one of Zurich's newest club venues "Aura", we staged 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. Our products were presented to 66 attending agents and 34 media during a spectacular multi-media show projected on oversized screens positioned in 360 degree format within the venue. A presentation was also held by the current Mr. Switzerland, Sandro Cavegn, who described his experiences in our area during his visit in October 2012. The evening culminated in a contest for the "Dream Job of the Year", i.e. becoming the personal assistant to the 16 new Mr. Switzerland candidates attending the Mr. Switzerland Camp scheduled to be held in Tampa and St. Pete/Clearwater in May 2013.

➤ *Tour Operator Business Development / Appreciation Dinner – March 12th*

Edelweiss Air, VSPC, Tampa Bay & Company, Tampa International Airport and Visit Florida hosted a special dinner event for the product management teams of Switzerland's most influential tour operators. The following guests attended:

- Hotelplan Suisse: Pino Andreano, Bettina Güntert

- Knecht Reisen: Marcel Gehring, Kenny Prevost, Christoph Huckele
- Kuoni: Beatrice Stalder, Remo Weidmann
- TUI Suisse: Fabio Negro, Karin Bachmann

Hosts took the opportunity to express their sincere appreciation for our partners' continued cooperation and support in promoting our areas and products. Equally, the hosts were complimented by attendees on their strong interest and continued marketing efforts in Switzerland.

We shall look forward to making this appreciation dinner an annual event in Switzerland.

Visit Florida Road Show (April 15th – 19th, 2013):

Visit Florida is organizing a five-day road show in Germany and Switzerland to the cities of Hamburg, Düsseldorf, Frankfurt and Zurich. This marks Visit Florida's first major program in the German-speaking markets since the engagement of their German representation firm last fall.

The purpose of the tour is to present a refreshed Florida image, news and highlights to travel agents and tour operator reservations staff. Partners will have the opportunity to present their products to over 280 German-speaking agents during evening events (roundtable workshop format) and intimate daytime tour operator in-house reservations agent sessions.

Having registered for this travel agent training program last month, we focused on providing Visit Florida with requested materials this month, including our workshop and in-house training presentations as well as content for an informational booklet to be distributed among attendees. We also counseled Visit Florida's new German team on best practices for well-rounded and smooth evening function formats. The evening functions will culminate in an exciting prize raffle.

We liaised closely with our Leisure Sales Dept. regarding distribution of a sponsorship opportunity for accommodations and attraction tickets. Once again, we are most grateful to our industry for their generous contributions.

The following Florida partners will be participating as presenters:

Fort Myers, Miami, Naples, Orlando, Disney, SeaWorld Parks & Entertainment and Universal. We will be joined by Delta Air Lines in the German cities and Edelweiss Air in Zurich.

Alamo Travel Trade Fam Tour (May 11th – 13th, 2013):

We have been approached by Alamo Germany, with whom we work very closely, regarding an opportunity to showcase our area to a group of product and sales managers from Lastminute.com/Holiday Autos in May. Lastminute.com/Holiday Autos is Alamo's largest European customer for travel to the USA generating 30,000 bookings annually.

The group of 7 pax will be on a whirlwind tour through Florida arriving in Miami on 5/09, staying for two nights, departing MIA on 5/11, driving to Orlando to visit the Alamo station, continuing straight on to our area on 5/11 and departing from MIA on 5/13. We continued to liaise closely with our Leisure Sales Dept. this month regarding accommodations and preliminary itinerary development including wishes expressed by Alamo. The group will be traveling in rental cars, which negates the need for ground transportation arrangements.

SeaWorld Parks & Entertainment Media Fam Tour (May 17th – 21st, 2013):

In conjunction with the opening of "Antarctica - Empire of the Penguins" at SeaWorld Orlando, Sea World Parks & Entertainment Germany will be inviting a group of journalists to participate in the grand opening festivities (May 22nd-24th). Edelweiss Air will be the co-sponsoring carrier. Costs for required Swiss feeder flights to Zurich are being generously borne by SeaWorld Parks & Entertainment. Due to our excellent working relationship with

SeaWorld Parks & Entertainment Germany, we have been offered an opportunity to showcase our area on this occasion. We liaised with HQ and KMS, our German PR agency, immediately giving SeaWorld Parks & Entertainment our confirmation to host this group of five journalists per our Deputy Director's directive.

We continued to facilitate communication and coordination between SeaWorld Parks & Entertainment and KMS this month.

Additional Activity:

We are pleased to have had the opportunity to support Tampa International Airport during a meeting with **Condor Airlines** in Frankfurt on March 4th. Currently, routing from Frankfurt to Tampa is under consideration for summer 2014. Frequency would be 2-3 times per week with a 767-300 aircraft. A final decision is expected by the end of May 2013.

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. Initial planning topics were discussed during ITB; fam dates expect to be locked in by June 2013.

MARKETING INITIATIVES

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

Tour Operators:

- CANUSA (Germany)
 - **Online “Florida Vacation Builder” Campaign** – May thru September 2013
- Following last year's successful “Florida Insider Community” campaign, the “Florida Vacation Builder” (VB) will combine an online marketing campaign with an exclusive long-term travel planning tool aimed at attracting the attention of repeat customers and new travelers to Florida. Center point of the VB is a map and a list of predefined highlights (POIs = points of interest). Picking the POIs by clicks, users can build their dream vacation in the destination on the map.
- The VB uses the viral potential of the social web as the users may share their dream routes with their friends and family by mail or on social media platforms. Additionally, users can send a booking request for their dream vacation including the map and dream route to Canusa within a few clicks.
- Furthermore, users can register for a raffle to win their dream vacation. This way the participants are highly involved in familiarizing themselves with the destination, awareness is generated as are bookings via an integrated contact form. The tool is placed on a landing page within the canusa.de homepage. This landing page - individually built for the destination - contains all information on the VB (instructions, registration form), the tool itself, further multimedia information on our destination (text and video gallery) and will link to product pages on canusa.de and the request form.

Communication platforms will include:

Website Marketing:

A special banner will be designed to promote the VB on the Canusa homepage (more than 2.5 million visitors yearly) for two weeks. Various smaller banners will be featured on related subpages throughout the whole six-week campaign period.

Email Marketing:

An eNews blast will be distributed to Canusa's database of 520k subscribers at the onset of the campaign.

Social Media Marketing:

The VB will be promoted continuously on Canusa's Facebook site (currently over 22k highly active fans) and to Canusa Twitter followers. In addition, Facebook ads will be used to reach new sociodemographically related target groups.

Search Engine Marketing:

Search engine optimized realization of the VB improves the visibility of the Canusa VB via organic search results. In addition, the Canusa VB will be advertised on Google Adwords.

This month Canusa submitted the layout design containing our 10 POIs, images, destination overview text and videos. Layout was proofed and corrected by us.

- 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.

This month we created the teaser, which will be launched in April.

In addition, Dertour is supporting 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)
 - **Travel Agent Booking Incentive Initiative** – March/April

An eNews blast will go out to 350 travel agencies via the TUI Suisse Counter Info platform on 3/27 announcing a booking incentive as follows:
The TUI ReiseCenter which books the most flights with Edelweiss Air to Tampa plus a minimum 7-night stay in a TUI featured VSPC hotel property by 4/28 will be eligible to win a flight for 2 to Tampa with Edelweiss Air and car rental for 1 week.

The tour operator has been provided with all elements necessary for eNews layout development and approvals have been provided as applicable.

- 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.
 Final campaign results are expected in April/May.

- HOTELPLAN SUISSE (Switzerland)
 - Two brands “Hotelplan” and “Travelhouse/Skytours”
 - 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.

The tour operator has been provided with all elements necessary for layout development and approvals have been provided as applicable.

- KNECHT REISEN (Switzerland)
 - **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.
 The tour operator has been provided with all elements necessary for layout development and approvals have been provided as applicable.

- KUONI (Netherlands)
 - **B2C Newsletter** – May

To 80,000 subscribers with VSPC image banner and text hook with link to Kuoni’s website platform containing VSPC hotel offers.
 - **B2B Newsletter** – May

To 1,200 subscribers with VSPC image banner and text hook with link to Kuoni’s website platform containing VSPC hotel offers.
 - **Social Media Activation** – May

Same time as the newsletters will go out three posts will be made on Kuoni’s social media network, i.e. Kuoni Netherlands Facebook page and the Kuoni blog INOUK.

This month we provided Kuoni with comprehensive content for the newsletters and the social media posts such as imagery, logo and text.

- **KUONI (Switzerland)**
 - **B2B eNews Blast Series / Sweepstakes – May-July**

A series of 4 dedicated eNews blasts will go out to 750 agencies, the first three of which will contain comprehensive destination content, imagery and logo with the final eNews containing a quiz. Launch will be on 5/29 with ensuing distributions on 6/12, 6/26 and 7/10. Edelweiss Air will also be featured commensurately. The travel prize will consist of an Edelweiss Air flight ticket to Tampa, a 7-night stay in our area and 1 week car rental.

The idea for this initiative was developed during our meeting at ITB with final details being worked out the end of this month. We shall proceed with providing the tour operator with elements necessary for layout development, securing an accommodations donation for the sweepstakes and coordinating efforts with Edelweiss Air over the next several weeks.

- **NECKERMANN REISEN (Germany)**
 - **RollAd Truck Campaign – March 1st – April 5th**

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.

Another added-value item to this campaign: Rather than disposing of the canvases at the end of the campaign, they will be utilized to produce messenger bags which will come in handy as giveaways.
 - **Online Homepage Teaser Box – March 2013**

VSPC logo, imagery and headline was depicted in a teaser box placed on the tour operator’s homepage for the period of one week (3/04-10). This linked to a subpage of VSPC hotel offers exclusively.

- **THOMAS COOK REISEN (Germany)**
 - **Illuminated Travel Agency Display – March/April 2013**

A brand new initiative offered exclusively by Thomas Cook Reisen, this illuminated display will be visible in 200 top selling agencies for six weeks and will include our imagery, logo, text hook and destination bullet point USP’s.

All elements necessary for layout development have been provided and final layout approved.

- **TUI (Germany)**
 - **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:

- America Journal (Germany) – circ. 42,000, readership 140,000 *Consumer*
 - **½ page, 4c Advertorial** – 2/13 issue (Feb/Mar ITB Special)

We provided the publisher with our logo, destination text and a selection of images. Final layout has been received and approved.

This German high-gloss consumer publication is dedicated exclusively to the USA providing in-depth coverage on American travel, culture and customs as well as insider tips and helpful hints.

Pub frequency: 6x/yr

- 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.

Dates have been secured for placement of our two sweepstakes contributions during this promotion. Our prizes will be featured in March/April and June/July.

- 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 contacts
 - Plus 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.

Accommodations for the Rainbow Reporter have been secured in our area September 15-19, 2013. We are most grateful to our accommodations partners for sponsoring housing! Airline and car rental partners were also secured this month.

- NATIONAL GEOGRAPHIC (Germany) – circ. 99,250 *Consumer*
 - **“Das Erbe Unserer Welt” Special Collector’s Salvador Dalí Edition** – May
5-pg editorial + 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.
The 1-page ad was developed and has been approved by our office and HQ. Applicable content has been provided for the development of the print editorial and online feature.
- Tom On Tour USA Guide (Germany) – circ. 120,000
 - **1/1 page, 4c advertorial** – March
Published annually, the “Tom on Tour USA Guide” is a 64-page publication highlighting gay friendly destinations throughout the USA including gay hot spots, web links, events and tourism information. The publication is distributed free of charge at selected European gay locations, events and consumer shows and can also be ordered online. This year Brand USA will support the guide, thus enabling the publisher to double the circulation from 60,000 to 120,000.
Pub frequency: 1x/yr
After having provided the publisher with all pertinent elements, the final layout was received and approved. The guide was published in time for ITB in Berlin.
- USA Guide of Visit USA (Germany) – circ. 15,000 *Consumer/Trade*
 - **1 page, 4c advertorial** – January-March
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 German consumer travel fairs (January through March), in the U.S. embassy and other U.S. related locations. VSPC is featured with a full page advertorial in this comprehensive book. America Journal has agreed to publish this piece, has been provided with all necessary materials such as images, logos and texts for advertorial development. Final layout was received and approved.

Online Aggregators:

- Expedia (Germany) – 1.4 million German subscribers *Consumer*
 - **Placement Campaign** – May 13-July 7, 2013

Pursuant to our meeting with Expedia Germany during ITB, we received a proposal the end of this month for an exciting campaign which is scheduled to launch in May – several weeks prior to the German summer vacation period and an excellent opportunity to make a strong push for more summer bookings. We are in the process of tweaking a few details and will proceed with creative layout development next month. A contribution has also been secured from Brand USA!

Public Relations:

Kaus Media Services - VSPC's German PR Agency

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

- **Press Release March:** Proofread and corrected.
- **Newsletter March:** Proofread and corrected.
- **German Consumer Press Fam:** Kindly reference the entry in the 'Sales Activities' section of this report.

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