

# CENTRAL EUROPEAN OFFICE

A P R I L 2013

Prepared by: Marion S. Wolf  
Director Central Europe

## MARKET INTELLIGENCE / TRENDS

### Stable Bookings in March

Holiday bookings in Germany showed a lower but stable growth rate in March, according to the latest monthly surveys of travel agency sales. The monthly survey of some 1,200 travel agencies by market researchers GfK found that sales increased by 4% last month, which was lower than at the start of the year, but came on top of a strong March last year.

Demand for summer holidays remained good last month and cumulated bookings for the summer 2013 season now lie 6.1% above last year, according to GfK. This is 0.2 percentage points lower than in February. Bookings were particularly strong for September and October. Winter holiday demand tailed off last month, leaving cumulated bookings for winter 2012/13 up by 4%. There was also a clear trend to early bookings for next winter, which starts in November. As many as 8.8% of bookings in March were for winter 2013/14 compared to 7.8% last year.

The TATS survey of business travel-oriented travel agencies also found stable leisure travel bookings in March, but a slump in air ticket sales. Overall sales were 4% higher than the same period last year. Leisure travel revenues increased by 4.5% last month, leaving them 5% higher for the first three months of the year. Advance sales for departures up to October grew by 1.7% in March.

### **GERMANY Travel Trade Barometer:**

#### **Projected to Register Growth through Second Quarter 2013**

German tour operators reported in the U.S. Department of Commerce sponsored *Germany Travel Trade Barometer* (as of February 11 - March 22, 2013) that bookings for travel to the United States from Germany will remain strong in the first quarter 2013. Two-thirds (67%) of the trade projected bookings to be higher (44%) and much higher (22%) when compared to the first quarter 2012.

At the time of the survey, the trade reported that bookings for the winter catalog period (November 2012-March 2013) were up 1% - 3% year-over-year.

Projections for second quarter 2013 were similar to those given for first quarter 2013. Two-thirds (67%) of the trade projected bookings from Germany to the United States to be higher (33%) and much higher (33%) when compared to the second quarter 2012. This projection

was supported by current bookings to the United States. Second quarter 2013 bookings were reported by the trade to be up 4% - 9% on average compared to second quarter 2012 bookings.

The top motivator listed for travel from Germany to the United States over the next six months was the level of promotion by U.S. destinations and businesses. The exchange rate was also listed as a motivator, along with travel safety in the United States.

Over the next six months, the top deterrent listed for travel from Germany to the United States was the cost of airfare. Entry and exit requirements and accommodation rates were also registered as deterrents.

### **REWE: DER Touristik is New Common Tourism Brand**

Rewe, Germany's second-largest tour operator group, has unveiled DER Touristik as its first-ever common brand for its diverse tourism activities to improve customer recognition, but will retain the well-established individual tour operator brands. The DER name, already used for the group's travel agency branches, was chosen ahead of Rewe, the name of the parent group and which mostly stands for supermarkets in the minds of German consumers. The new umbrella brand, with a red logo in the shape of a suitcase handle, will replace the confusing former split between Cologne-based 'Rewe Touristik' and 'DER' in Frankfurt, originally the abbreviation for 'Deutsches Reisebüro'. "More than six million holidaymakers travel with our group every year, possibly without knowing it," explained DER Touristik CEO Norbert Fiebig at the high-profile launch on April 12<sup>th</sup>. "In future, we will show them which strong, quality-aware and reliable group they are trusting." The group is number two in Germany behind TUI and ahead of Thomas Cook in terms of tour operator revenues, and has total turnover of €4.7 billion from tour operator and travel agency sales.

In the future, DER Touristik will comprise the tour operators ITS, Jahn Reisen, Tjaereborg, Dertour, Meier's Weltreisen and ADAC Reisen and become the new name of the group's travel agencies, which comprise the largest tourism retail sales network in Germany. ITS focuses on mainstream holidays, Jahn Reisen offers up-market packages while Tjaereborg is the budget brand. Dertour offers a wide range of flexible individual holidays, Meier's is a long-haul package holidays specialist while ADAC Reisen has a loyal customer base at the ADAC automobile association.

The tour operator brands will be retained as they each target different customer needs, Fiebig told fvw. "With 2,100 branches, franchises and cooperation partners, we have the strongest sales network and have deliberately integrated the retail brand DER in the DER Touristik umbrella brand. That is a completely different approach to one of the big competitors which integrates the name of its biggest tour operator brand into its umbrella brand," he added, in reference to the 'World of TUI' brand. Sören Hartmann, CEO of re-named DER Touristik Köln GmbH, said: "Rewe Touristik with its brands ITS, Jahn Reisen and Tjaereborg is a well-known and reliable partner in the tourist destinations. Now that we belong to the new DER Touristik, our partners in the holiday countries will also benefit."

The group will invest a double-digit million Euro sum in the brand rollout. The DER Touristik name will be most visible for German consumers at the group's 2,100 travel agencies, franchise partners and other retail outlets. Some 750 travel agencies will have the new name and façade design by the end of this year. The Atlas Reisen brand will disappear.

In parallel, DER Touristik will start to modernize its agencies by turning them into 'travel shops' without the usual wall racks of holiday brochures. Counter staff will be re-trained to focus more closely on individual customer wishes. "We don't want agencies in an office style any more. Our new look is young, fresh and inviting," said travel agency chief Andreas Heimann. At the same time, DER Touristik has launched a new online portal under [www.der.com](http://www.der.com). The website is designed as an information platform for holiday research and as a 'virtual travel agency' where DER experts will present their areas of specialist knowledge. "We are merging sales channels and whoever wants professional advice and the right holiday will find it with our experts, regardless of where and how he seeks us," Heimann explained.

The red logo will also be introduced in destinations at airports and will be used by tour representatives and travel guides as well as appearing on all holiday catalogues and documents.

### **Germany to Power European Business Travel in 2013**

Business travel spending in Germany and the UK will grow again this year, but France, Italy and Spain will decline due to their weak economies, according to a major new survey of European market trends. Overall prospects for 2014 are brighter. According to the report by the Global Business Travel Association (GBTA), business travel spending will grow throughout 2013 across most of developed Europe, with overall business travel spending being fuelled by domestic business travel spending growth. The significance of domestic business travel is partly due to the impact that reduced trade will have on international outbound travel in 2013.

Germany, the largest business travel market, will record Europe's highest business travel spending growth rate with a 5% rise to \$53 billion in 2013. Further growth of 5% to \$55.7 billion is currently forecast for 2014 as well. Domestic travel spending will grow an estimated 5.7% in 2013, followed by an additional 6% in 2014, while outbound business travel will bounce back by 2% this year and another 0.6% in 2014, according to GBTA.

Except for the UK, the other major European business travel markets will all decline this year, according to the survey. French business travel spending is expected to fall by 1.4% to \$35.2 billion and then to recover next year. The struggling southern economies of Spain and Italy will see even weaker trends. Spanish business travel is predicted to drop back by 6.2% this year while Italy will decline 2.9%, according to the survey.

For 2014, GBTA forecasts a return to an improved and stable environment for business travel in Western Europe, with the top five markets, Germany, the UK, France, Italy and Spain returning to growth. A key factor of this recovery is international outbound travel, with all countries achieving positive growth in the sector as trade prospects improve. Overall GBTA expects total business travel spending among the five countries to hit \$184 billion in 2014.

Catherine McGavock, Regional Director for Europe for GBTA, said: "In the context of the struggling European economy our expectations for business travel spending in Western Europe are relatively positive for 2013. There are signs of recovery in Germany and the UK, with both expected to experience growth in business travel spending this year. We believe that this is the beginning of a wider trend in the region and expect growth in business travel spending to accelerate in 2014 to the levels we saw before the Eurozone crisis."

### **Thomas Cook: New Strategy**

Thomas Cook is “out of intensive care” and on the path to recovery with a new management team, a new strategy and new ideas, CEO Harriet Green told fvw in an exclusive interview.

This month, a new strategy was presented based around new products and hotel concepts, more online sales and fewer brands in a drive to increase revenues, cut costs and improve profits substantially by 2015. In the hotel market, the company will roll out the Sunwing and Sentido brands for premium customers, launch a new brand targeted at families and expand the new Smartline brand in the budget sector. The broad brand portfolio will be simplified to the core Thomas Cook brand and well-established local brands and online sales growth will be a top priority.

Asked about Thomas Cook’s financial health following its near-collapse last autumn, Green stressed: “Thomas Cook is fundamentally a stable company, has great brands, can use economies of scale and achieves a gross profit margin of more than 20% in the operational travel business. The problem is that we don’t convert this into the appropriate profits.” Her immediate task after becoming CEO last August had thus been to reduce costs and secure the company’s liquidity. Green added: “The patient has stabilized and is now out of intensive care. Now it’s a question of the transformation: for that we need the whole management team.” Although the new top management includes three German-speakers with Peter Fankhauser, Christoph Debus and Ralf Teckentrup, Green stressed that together with other new appointments the management had been “globalized” rather than “German-ised”.

The core of her strategy is closer cooperation between the major markets by sharing and implementing best practices and breaking down ‘silo-thinking’. Green confirmed that Cook was adopting various “successful concepts” from Germany and Scandinavia, including the hotel brands Sentido, Smartline, Sunwing and Sunprime. “We are adopting successful concepts. It’s not important for me where they come from,” she commented.

### **KUONI: Withdrawal from French and Italian Tour Operator Markets**

Swiss group Kuoni is quitting the French and Italian markets to complete its re-positioning in Europe which hit profits for 2012. The company already sold its tour operator activities in the Netherlands and Spain to local management and Russian firm Megapolis Tours to another company last November. Earlier in March, Kuoni sold its Italian tour operating business to RS Holding. The Belgian tour operating businesses and B2C online hotel platform Octopustravel are due to close this year.

In the latest move, Kuoni said it will sell its five loss-making French tour operating businesses to the local management. The business, with 272 staff, had turnover of CHF 175 million last year, but made a loss of CHF 3.1 million and the results are not expected to improve in the near future given the weak French economy. Other tour operators, including TUI and Thomas Cook, are also struggling in France.

“The transformation process announced in September 2012 is now largely completed. It leaves Kuoni with profitable and successful European tour operating businesses in Outbound Nordic (Scandinavia and Finland), Switzerland, the UK, and its specialist brands in Benelux,” explained Peter Rothwell, CEO of Kuoni Group. 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.

The European restructuring hit the company's results for 2012. Group revenues grew 14% to CHF 5.8 billion. Operating profits dropped to CHF 53.3 million from last year's CHF 74.2 million due to a one-off charge for the market withdrawals. The company closed the year with a net loss of CHF 13.2 million compared to a CHF 33.3 million profit in 2011. Kuoni said it again expects a "challenging" year in 2013 due to the continuing difficult economic environment.

## **SALES ACTIVITIES**

### **Visit Florida Road Show (April 15<sup>th</sup> – 19<sup>th</sup>, 2013):**

We participated in Visit Florida's five-day travel trade 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 focus of the road show was to present a refreshed Florida image including latest news and highlights to travel agents and tour operator reservations staff. Partners presented their products to 304 German-speaking agents during evening events (roundtable workshop format) and intimate daytime tour operator in-house reservations agent training sessions.

Evening events culminated in an exciting prize raffle. Once again, we are most grateful to our industry for their generous contributions. In addition, surveys were distributed to agents during each of the evening events asking for feedback on the venue, food & beverage, presentation format and an evaluation of the product content presented by each partner. We are proud to report that Visit St. Pete/Clearwater received the highest marks in each city!

The following Florida partners participated as presenters:

Fort Myers, Miami, Naples, Orlando, Disney, SeaWorld Parks & Entertainment and Universal. Delta Air Lines joined us in the German cities and Edelweiss Air participated in the Zurich event.

### **Alamo Travel Trade Fam Tour (May 11<sup>th</sup> – 13<sup>th</sup>, 2013):**

We were 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 final itinerary development taking wishes expressed by Alamo into consideration. The rooming list as well as our release and waiver forms were received and forwarded to HQ. The group will be traveling in rental cars, which negates the need for ground transportation arrangements.

### **SeaWorld Parks & Entertainment Media Fam Tour (May 17<sup>th</sup> – 21<sup>st</sup>, 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 five journalists to participate in the grand opening festivities (May 22<sup>nd</sup>-24<sup>th</sup>). 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 continued to facilitate communication and coordination between SeaWorld Parks & Entertainment and KMS this month.

**Travel Agent Roundtables (September 29<sup>th</sup> – October 1<sup>st</sup>, 2014):**

Early preparations were launched for the Travel Agent Roundtables 2014 in Nürnberg, Stuttgart and Wiesbaden in cooperation with Visit Orlando and SeaWorld Parks & Entertainment. At this stage, the organizer has been asked to check and secure dates and venues for these programs.

*Additional Activity:*

Travel agent Claudia Koch of **Neukauf Reisen Ehingen** asked us for assistance in planning her visit to our area in May this year. We sent her comprehensive information material and several tips.

## **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 final layout design containing our 10 POIs, images, destination overview text and videos. The program is due to launch the middle of May 2013.

- **DERTOUR (Germany)**

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

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

- Dispenser/Flyer:** 750 travel agencies were sent 100 specially developed VSPC flyers along with a dispenser for placement which was displayed for two weeks between November and January.

- Postcard Mailing:** 5,000 postcards were produced containing our imagery, logo and text which travel agents had the opportunity to order free of charge for use in their own mailings to clients. Execution: November.

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

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

- Teaser:** A VSPC teaser was placed on the North America, USA Travel and long-haul platforms of Dertour's website (dertour.de) for two weeks this month (4/05-19). The North America platform generated 968 page impressions, 13 clicks and a click-through rate of 1.34%. The USA Travel platform generated 1,180 page impressions, 12 clicks and a click-through rate of 1.02%. Lastly, the long-haul platform generated 1,926 page impressions, 13 clicks and a click-through rate of 0.67%. Eight bookings of 23 pax were generated for VSPC during the period 4/05-5/07/2013. During the same period in 2012, only 1 booking of 2 pax was logged.

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

- Print Ad:** Travel agencies placed ads in regional newspapers promoting VSPC. Dertour supported the agencies in this effort with an 80% cost contribution.

In addition, Dertour supported 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

This month marks the conclusion of our marketing initiatives with Dertour this fiscal year. We are already in discussion with the tour operator regarding next fiscal year's activities.

- FLEX TRAVEL/TUI SUISSE (Switzerland)
  - **Travel Agent Booking Incentive Initiative** – March/April
 

An eNews blast was distributed 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 was provided with all elements necessary for eNews layout development and approvals were 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.

FTI Touristik reported receiving a total of 6323 pax, a 45.3% increase from the start to end of the campaign window. The campaign impacted their winter 2012/13 bookings and summer 2013 bookings. Bookings to our area were reported as being up by close to 10% for winter 2012/13 and over 70% for summer 2013.
  
- HOTELPLAN SUISSE (Switzerland)
  - Two brands “Hotelplan” and “Travelhouse/Skytours”
    - TRAVELHOUSE / SKYTOURS
      - ◆ **Consumer eNews Blasts** – May & September
 

eNews blast to 65,000 consumers in German-speaking Switzerland to include VSPC imagery, logo, destination description and travel teasers.

The tour operator was provided with all elements necessary for layout development last month and approvals have been provided as applicable. The May eNews will be distributed on 5/03; the September eNews will launch on 9/06.
  
- KNECHT REISEN (Switzerland)
  - **Website Promotion** – January-May
 

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.

Originally due to end this month, the tour operator informed us they would extend the promotion to the end of next month free of charge!
  
- 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
 

In addition to the eNewsletters, three posts will be placed on Kuoni’s social media network, i.e. Kuoni Netherlands Facebook page and the Kuoni blog INOUK.

We have provided the tour operator with elements required. Layouts were received this month, corrections made and approvals provided.

- **KUONI (Switzerland)**
  - **B2C eNews Blast** – April  
To 78,100 subscribers with VSPC image banner + text hook with link to Kuoni’s website platform containing VSPC hotel offers + Edelweiss Air flights.  
This month the second consumer eNews Blast was launched after we approved content and layout.
  - **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 a one-week car rental.  
We worked out the final strategy this month, coordinating efforts with Edelweiss Air, and provided the tour operator with initial elements necessary for layout development. We also prepared a solicitation document for distribution to VSCP properties featured by Kuoni in conjunction with the travel prize to be raffled.
  
- **NECKERMANN REISEN (Germany)**
  - **RollAd Truck Campaign** – March 1<sup>st</sup> – April 5<sup>th</sup>  
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 entailed placement of an enticing VSPC image, logo, text hook and travel teaser on large canvases affixed to the rear of four 18-wheeler trucks for a duration of five weeks. Estimated sightings for consumers aged 18 and over: 58 million/100 trucks. Cumulatively, our four trucks traveled 57,293 kilometers in Germany over the campaign period.  
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. These will be provided free of charge and will come in handy as giveaways. We are currently awaiting receipt from the tour operator.
  
- **OAD Reizen (Netherlands)**
  - **Online Dedicated Landing Page** – April/May  
For four weeks, our destination was featured along with special travel offers on [oad.nl/stpetersburg-clearwater](http://oad.nl/stpetersburg-clearwater). The initiative was launched on 4/10.
  - **Travel Agency Window Flyer** – April/May  
A special flyer containing travel offers to our area will be featured in the window sleeves of 180 Globe travel agencies for one week (4/26-5/03).
  - **B2C eNews Blast** – April  
VSPC received placement in the OAD Reizen eNewsletter going to the tour operator’s database of 550,000 contacts. The blast was distributed 4/29.
  - **Online “Top 5” Promotion** – May  
From 5/01-14, VSPC will be featured as one of 5 top destinations within the ‘Florida Trips’ platform of OAD’s intercontinental destinations website ([www.oad.nl/verre-reizen](http://www.oad.nl/verre-reizen)). In addition, a specific topic with offers to our area will be published on the Florida page of Oad Reizen ([www.oad.nl/florida](http://www.oad.nl/florida)).

We provided OAD will all necessary input such as text, logos and images. Final layout was corrected and approved by us.

- THOMAS COOK REISEN (Germany)
  - **Illuminated Travel Agency Display** – March/April 2013  
A brand new initiative offered exclusively by Thomas Cook Reisen, this illuminated display was placed in 200 top selling agencies for six weeks and included our imagery, logo, text hook and destination bullet point USP's.
- 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 was launched March 21<sup>st</sup> and will run for three months until June 21<sup>st</sup>. 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.  
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.  
This month the first sweepstakes winner was drawn. He received the respective gift certificate from us as well as comprehensive destination information.
- 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** – May  
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 have also been secured. The winning candidate will be selected next 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.

*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 last 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. A contribution has also been secured from Brand USA!  
Creative development and content were discussed and agreed upon this month.

An updated media plan was compiled and forwarded to HQ and BVK this month.

*Public Relations:*

**Kaus Media Services - VSPC's German PR Agency**

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

- **Press Release April:** Provided input, proofread and corrected.
- **Newsletter April:** Provided input; awaiting final draft.
- **German Consumer Press Fam:** Kindly reference the entry in the 'Sales Activities' section of this report (SeaWorld Parks & Entertainment Media Fam Tour).

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