

CENTRAL EUROPEAN OFFICE

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MARKET INTELLIGENCE / TRENDS

Moderate Growth in 2013

German travel agents ended the 2102/13 year with a moderate 4% sales increase, but the outlook for next year is healthy, according to the latest monthly survey by market researchers GfK. The figure was well below the stronger growth of the last few years, such as 8.8% growth in 2011/12 and an 11.6% increase one year earlier, but reflects the impact of Egypt on bookings this year as well as the insolvency of tour operators such as GTI.

Both the winter and summer seasons ended with a 4% rise in sales revenues, the survey of some 1,200 agencies showed. The peak summer months showed divergent trends with a 4% drop in July sales, but a 5.4% rise for August. The other months all increased sales, led by May (+9.5%) and October (+7.6%).

The outlook for the new 2013/14 tourism year is good, according to initial figures. Sales for the winter season are up by 3.2%, having slowed after a very strong start. November is selling well with a 4.8% increase; December is slightly behind last year. With a later Easter next year, April sales are up by 40% while March is down 13%.

Demand for summer holidays was good in October, with 40% of all travel agency bookings covering the summer months. Once again Germans started booking their summer holidays early, attracted by a diverse range of discounts. In contrast, short-notice bookings were lower, with a 2.5% drop in sales for November and December.

German Tour Operators Improve Profits

Tour operators in Germany improved not only revenues, but profits this year thanks to higher prices and cost management, according to the annual fvw dossier on German tour operators. The 57 German tour operators who provided figures for the 2012/13 year ending October 31, 2013, increased their revenues by 3.8% to €19.9 billion. The firms represent about 80% of the total tour operator market (and 90% of the air-based package holiday market), which is put at €25.3 billion by the German Travel Association (DRV). The overall market grew about 3.5%, according to the DRV.

Customer numbers remained stable this year, but revenues still grew due to several factors. Average prices increased as operators passed on higher rates for hotels and air capacity. Another reason was the increase in sales of higher-value products such as cruises and long-

haul trips. In general, German tour operators profited from a good consumer spending climate in Germany driven by the stable economy and comparatively low unemployment levels. This outweighed negative factors such as the crisis in Egypt and several insolvencies, including GTI/Sky Airlines. Growth was slower this year, but the last three years showed strong cumulative growth of 17% following the crisis year of 2009.

Most tour operators also managed to improve their profits: 22 out of 36 companies who responded to the question about their financial results said that their pre-tax profits had improved this year. Ten said they had stable profits and only four reported lower profits. Profit margins for most companies were between 1% and 3%. Cost management as well as higher revenues were the key factors behind this trend.

Looking ahead, most tour operators are off to a good start for the new tourism year, and the industry's booked revenues are showing a 5% increase as of end-November. However, consumers normally seek to profit from early booking discounts and the growth rate then normally tails off gradually over the following months of the business year. Tour operators expect market growth in the 3-4% range again in 2013/14, with smaller firms targeting stronger growth than the major groups who are more focused on profit levels. Customer volumes, however, are likely to remain constant or only increase very slightly. The main uncertainty factors in 2014 include the very late Easter holiday, the World Cup in June/July and the unusually tight summer holiday period with many overlaps between the different regional states.

Good November Sales

Holiday sales grew well in German travel agencies last month boosted by demand for winter holidays and early bookings for next summer, according to the latest monthly surveys. After two weak months, sales for winter 2013/14 holidays grew again in November with a 5.8% increase, the GfK survey of 1,200 German travel agencies showed. The cumulative sales increase for the whole winter season rose to 3.6% as of end-November compared to 3.2% one month earlier. Demand for next April was particularly strong due to the late Easter holidays next year.

However, most consumers were already thinking about next year's summer holidays and 60% of booked revenues last month were for summer 2014. Sales are currently 8.2% ahead of last year, with generally good demand for the main summer months.

In contrast, the monthly survey of 2,400 agencies by services provider TATS showed a 5% overall drop in agency sales last month. This was driven by a 6.1% decline in airline ticket revenues while tourism sales were down by a slight 0.5%, according to the survey.

Nevertheless, travel agents in Germany are generally optimistic about 2014. About 36% of agencies surveyed for the monthly Sales Climate Index said the current situation was good while a further 44% were satisfied. Looking ahead, nearly 30% of agents predicted that demand would grow in the coming months while nearly 60% expect stable conditions.

Tourism Industry Criticizes Flight Tax

The German tourism industry has reacted to the incoming government's decision to maintain the controversial flight tax. The Christian Democrats and Social Democrats agreed in their coalition deal not to drop the tax despite an earlier informal commitment to do so. The tax, which raises about €1 billion a year for the finance ministry, has raised flight prices and driven passengers in border regions to book cheaper flights from foreign airports, according to the aviation industry.

Ralf Teckentrup, head of Condor and president of the German Airlines Association (BDF), described the decision as “an insult to the industry” and also criticized the night flight ban at Frankfurt Airport for increasing the sector's costs during a discussion at the annual conference of the German Tourism Industry Federation (BTW) in Berlin on Monday. Klaus-Peter Sieglösch, president of the German Aviation Industry Association (BDL), representing airlines and airports, said the failure to abolish the tax meant the future government “is missing a chance for future growth”. The director of the German airports association (ADV), Ralph Beisel, said: “German policy-makers cannot be interested in having German passengers switching to nearby foreign airports. The abolition of the aviation tax must remain on the political agenda.”

Jürgen Büchy, president of the German Travel Association (DRV), agreed with the other associations' comments and also criticized the coalition agreement for failing to recognize the importance of the outbound travel sector. Outgoing tourism had a positive effect, for example, on the development of crisis-hit countries such as Egypt and Tunisia, he said. About 75% of Germans took at least one annual holiday, and thus secured jobs for airlines, airports, hotels, travel agencies and others, he added.

Market Leaders Outpaced by Smaller Rivals

Smaller tour operators once again grew faster than the leading groups in Germany this year and increased their market shares. The three largest German tour operators – TUI, Thomas Cook and DER Touristik – all grew moderately this year, but their nearest rivals and smaller specialists grew faster and slightly narrowed the gap on the market leaders, according to the annual fwv dossier on the German tour operators market. The top three saw their combined share of the overall market drop slightly to 43.7% from 44.5% last year.

TUI remained the clear market leader with nearly 18% and also achieved a record profit despite flat revenues. The company's revenues were unchanged at just under €4.5 billion and customer volumes were stable at 7.5 million, according to fwv estimates. Long-haul holidays were the main growth business; sales of overland travel packages declined. The profit margin improved to 2.9% from 2.6% last year thanks to higher sales of exclusive and differentiated profits and continued cost savings.

Thomas Cook, in second place when the seat-only sales of Condor are included, increased Germany revenues significantly to an estimated €3.4 billion despite a near 5% drop in customer volumes to some 5.8 million. Subsidiary Öger Tours, which specializes in Turkey holidays, was a growth driver along with higher-value hotels and long-haul holidays. The company improved its German profit margin to about 3.5% from nearly 3% last year, according to analysts, and its overall market share was about 13.5%.

Third-placed DER Touristik, which is larger than Cook in pure tour operator sales, increased revenues to nearly €3.2 billion and had stable customer numbers of some 6.2 million. Its market share was about 12.5%. The Rewe-owned tourism group successfully introduced the 'DER Touristik' name as the new tourism brand, covering both the Cologne-based package holidays business (ITS, Jahn Reisen and Tjaereborg), which accounts for about 45% of revenues, and the Frankfurt-based individual and specialist holidays unit (Dertour, Meier's Weltreisen, ADAC Reisen), with about 55% of revenues. The profit margin improved towards the 2% target figure this year.

The nearest rivals – FTI, Alltours, Aida Cruise and Schauinsland Reisen – all grew strongly. The FTI Group led the way with revenues up by 14% to €1.85 billion this year and customer numbers 10% higher at 3.4 million. The company, with a small profit margin, is currently investing in growth, according to CEO Dietmar Gunz.

Meanwhile, smaller tour operators, who make up the remaining 35% of the market, generated combined growth of 9.1% this year and thus grew nearly three times faster than the overall market. Their individual performance varied significantly, however. Among the growth winners were TUI Cruises, TUI's premium cruise operator Hapag-Lloyd and dynamic packaging operator JT Touristik.

TV Broadcaster Buys Travel Portals

German TV broadcaster ProSieben Sat 1 is investing an estimated €40 million to buy online travel portals 'weg.de' and 'ferien.de' to create a multi-channel tourism advertising and sales offerings. The media group, which has several mass-market TV channels, aims to expand its travel retailing business through the acquisitions of the privately owned portals. The core objective is to develop multi-channel sales, with TV advertising supporting online sales.

"The internet travel market is one of the big e-commerce markets and profits enormously from TV advertising," said Christian Wegner, digital director for ProSieben Sat 1. The two portals, owned by Comvel GmbH, had estimated combined sales of some €290 million in 2012, according to fvw's annual German travel agents' dossier. The group already has a diverse travel portfolio, including dynamic packages operator Tropo, the weather portal Wetter.com, and several other specialized portals. These are all already promoted on the group's TV channels.

SALES ACTIVITIES

CMT Stuttgart Super Sweepstakes (January 11th – 19th, 2014):

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 began last month with the official sweepstakes website going live.

Two travel stays in St. Petersburg/Clearwater area will be included. We are again most grateful for the generous support of our industry partners!

Vakantiebeurs (January 14th – 19th, 2014):

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. Registration formalities and collateral shipping arrangements have been completed.

Of note is that Visit Florida will not organize a tour operator luncheon next year citing reports of continued reluctance by the operators to dedicate time to attend the traditional luncheon.

Visit USA Seminar Switzerland (February 5th, 2014):

This program is Switzerland's premier travel agent training seminar held in Zurich annually. 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.

Florida has been selected as the 'featured destination' for next year's seminar, which will entail a concentrated presentation on the many features and benefits of the Sunshine State. We will participate under the Visit Florida umbrella to promote our area during both workshops and a comprehensive training session. This month we attended a Visit Florida meeting to discuss details of the 'featured destination' elements. We also sent our Leisure Travel Department elements necessary for distribution of an industry opportunity for purposes of soliciting interest in sponsorship of a three-night stay for the grand travel prize. Edelweiss Air will sponsor flights to Tampa.

Visit USA Seminar Austria (February 6th-7th, 2014):

Known as Austria's premier travel trade event, the Visit USA Seminar Austria will be held in Linz and Graz next year and is expected to attract up to 150 agents cumulatively. The format will comprise an afternoon seminar with an ensuing evening event in each city. 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" during which we will have the opportunity to provide feedback and discuss future planning.

ITB (March 5th – 9th, 2014):

Known as the "world's largest tourism fair" held annually in Berlin, Germany, we again plan to exhibit within the Visit Florida Pavilion. Registration has been completed with one hotel partner joining us next year. Further organizational items are underway, i.e. a hotel room block has been secured and an applicable reservations form for the VSPC delegation has been developed in concert with the chosen hotel and distributed to all relevant parties. An exhibitor update containing relevant show details was developed and distributed to our hotel partner this month. Appointment scheduling will commence next month. Updates to be forthcoming.

Swiss Business Development (March 10th, 2014):

After our successful tour operator appreciation event following ITB in 2013, we will again conduct this event in 2014 with a view toward making the event an annual tradition. The venue has been selected for 2014 and applicable paperwork has been processed. Visit Tampa Bay has agreed to co-host this event. A "Save the Date" notice was deployed to our guest list last month. Development of further details are on the agenda for the coming months.

DERTOUR Country Special Mega Fam (May 10th-13th, 2014):

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.

Pursuant to an initial briefing meeting with the tour operator, travel dates have now been secured with the co-sponsoring carrier, United Airlines. The group will arrive in Orlando on May 6th and proceed to our area on May 10th.

During October's county visit, we took the opportunity to connect with several industry partners regarding sponsorship of accommodations, evening events, attractions visits and site inspection opportunities. Accommodations have been secured. The tour operator advised flight pattern details which have been forwarded to HQ.

The tour has requested an initial itinerary be provided early next month. Updates to be forthcoming.

Travel Agent Roundtables (September/October 2014):

Early preparations were launched for the Travel Agent Roundtables 2014 in Cologne, Nürnberg, Kempten 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.

MARKETING INITIATIVES

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

Tour Operators:

- **AMERICAN VACATIONS (Netherlands)**
 - **B2C Exclusive VSPC Flyer** – January
A two-sided flyer will be created depicting our logo, imagery and comprehensive destination description. It will be distributed at trade shows, point-of-sales and included in travel documentation. Initial print run of 2,500 pieces.
 - **B2C Glossy Magazine Feature** – January
VSPC will be featured on four pages of the 44-page piece with logo, imagery and comprehensive destination information. Initial print run of 5,000 pieces. The magazine is distributed to loyal customers and frequent bookers.
 - **B2C Homepage Banners** – January-December
VSPC will be featured on homepage banner ads in the Netherlands, Belgium and Germany on the tour operator's three websites:
americanvacations.nl, americanvacations.be and americanvacations.de.
- **AMERIKAREISEN.AT (Austria)**
 - **1 page, 4c Advertorial in Florida Supplement** – January
Amerikareisen.at will create and produce an 8-page Florida supplement piece in cooperation with six Florida partners, each being featured on a full page. Distribution at fairs and during customer presentation. In addition, the supplement will be included

- in “GOLDENAge” magazine, a travel and lifestyle magazine for the generation 50+ with a circulation of 39,000. Publication date: January 2014.
- **Homepage Placement** – January
Florida will be specially presented on the tour operator’s homepage with focus on the participating destination partners.
 - **eNewsletter** – January
A Florida stand-alone Newsletter will be produced featuring content provided by Visit Florida and participating destination partners. Distribution to 3,200 customers.
The tour operator has been provided with all elements necessary for creative development.
- CANUSA Touristik (Germany)
 - **B2C Online “MoodPage” Campaign** – 2nd Quarter 2014
Following last year’s successful “Florida Vacation Builder ” campaign, this year’s “MoodPage” campaign will combine a collage of photos and videos presenting our destination. Images become the story tellers. These will link to an adapted landing page on the tour operator’s website and will link to an optimized booking engine.
In addition, an eNews blast to Canusa’s database of over 500,000 subscribers and continuous Facebook posts will be included (Facebook fans currently stand at over 40,000). Co-op partners are Visit Florida + several Florida destinations.
The tour operator has provided a detailed list of specs and requirements. We supplied a selection of images and relevant destination copy.
 - DERTOUR (Germany)
 - **B2B “Dertour Country Special” Promotion** – January 13-31, 2014
We will once again have the privilege of hosting Detours’ Country Special mega fam comprised of their top 100 agents in May 2014. Agents are selected based primarily on top revenue production to the USA. In an effort to draw attention to our area and motivate the generation of bookings leading up to the mega fam event, a sweepstakes will be launched on Detours’ exclusive travel agency platform “makingexperts.de”, remaining live for four weeks.
Comprehensive destination information in PDF format for download, a VSPC video link and an online version of our new *Gulf to Bay* magazine will be uploaded to the platform along with up to eight VSPC sweepstakes questions and prize descriptions – the grand prize being guaranteed participation in the Dertour Country Special mega fam.
The tour operator has been provided with all elements necessary for creative development, including the link to our online magazine *Gulf to Bay* and our destination video for the sweepstakes.
 - **“Best Places to Be” Campaign** – January-March
Focused on promoting summer 2014, this campaign will consist of multi-channel communication targeting both B2C and B2B platforms.
 - Print:**
 - 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: January 6th.
 - Flyer:** 2,600 top travel agencies will each be sent 10 specially developed flyers containing general destination information, imagery, logos and travel offers for use at counter point-of-sale. Planned execution: January 24th.
 - Poster:** A window display poster featuring VSPC imagery, logo and travel teaser will be distributed to 8,900 travel agencies. Planned execution January 24th.
 - Newspaper:** Two coop advertisements will be placed in “Die Welt”, a German national daily and “Welt am Sonntag”, the market leader in quality Sunday

newspapers. Total circ. 420,000. The ads will include a brief destination description and travel offer. Planned execution: February

Online:

Teaser: A VSPC teaser will be placed on the tour operator's homepage for two weeks containing our imagery, logo, brief destination description and travel offer with direct link to a landing page and booking engine.
Planned execution: March 14th-28th.

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

- 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

- **EXPLORER FERNREISEN (Germany)**

- **B2C "Reisetrends 2014" special brochure** – January-March

The Explorer Fernreisen special brochure "Reisetrends 2014" (Travel Trends 2014) will be produced and distributed at eight different consumer trade fairs across Germany. VSPC will be featured on a full page comprised of copy, imagery, logo and several travel teasers developed by the operator. In addition, the brochure will be inserted into the December/January issues of four travel magazines: Clever Reisen, Geo Saison, Lonely Planet Traveller and Reise & Preise.

Total print run will be 350,000.

The tour operator has been provided with all elements necessary for creative development

- **B2C eNews Blast** – December-February

Special VSPC travel packages and destination information will be included in three eNews blasts to Explorer's database of 38,000 customers for three consecutive months.

- **B2C Online Dedicated Landing Page** (one year starting November):

A VSPC dedicated landing page will be placed on a subsite of the tour operator's homepage containing comprehensive destination information, imagery and logo along with a link to VSPC travel offers. Content, imagery and logo were reviewed and updated this month.

- **FTI TOURISTIK (Germany)**

- **B2C Websale "Ab In den Urlaub"** – January

Ab-in-den-Urlaub.de is among Germany's leading online travel portals boasting 4.8 million unique users, 62.5 million page impressions and 8.8 million unique visits monthly. VSPC will be featured in a special 'our recommendations' teaser box with image and travel offer for four weeks and in the 'top hotels' segment of a monthly eNews blast to over 840,000 subscribers.

- **B2C Out of Home Info Screens** – February

Innovative and designed to attract attention, digital info screens in highly frequented train stations will feature VSPC imagery, logo and a travel offer selected by FTI. A total of 135 info screens will depict VSPC 18x/day for 7 seconds each in Berlin, Frankfurt, Hamburg and Munich for six consecutive days. Cumulatively, these train stations represent a footfall of over 2.5 million.

- **B2C Out of Home Billboards** – February

Attention getters in prominent downtown locations, these billboards will feature VSPC imagery, logo, unique selling points and a travel offer selected by FTI. A total of 260 billboards will be placed in Berlin, Frankfurt, Hamburg and Munich for eleven consecutive days.

- **B2B2C Dispenser/Flyer** – March

500 top USA-selling agencies will each receive a high quality desktop dispenser containing thirty VSPC flyers featuring our logo, imagery, destination description and travel offers selected by FTI.

We have provided the tour operator with all elements necessary for creative development of this comprehensive campaign.

- HOTELPLAN SUISSE (Switzerland)
 - Two brands “Hotelplan” and “Travelhouse/Skytours”
 - TRAVELHOUSE / SKYTOURS
 - **B2B2C Special Offer Flyer** – December
 - A print run of 7,000 A4-sized, double sided flyers will be distributed among 600 travel agencies (420 German and 180 French-speaking) depicting VSPC imagery, logo, destination text and travel offers for counter point-of-sale use.
 - **B2C Online Placement** – January & August
 - The initiatives will give VSPC a focused presence on the travelhouse.ch website.
 - Annual statistics:
 - 5 million page views, 1 million visitors, average time on site is 4 min., 80% German-speaking, 20% French-speaking, affluent customers seeking travel experiences (not budget shoppers).
 - Highlight teaser on homepage for two weeks
 - Top item product teaser on homepage for two weeks
 - Blog spot teaser on homepage for one week
 - Banner ad for two weeks on website’s beach holiday subpage
 - Separate blogs on ‘blog.travelhouse.ch’
 - Two blog posts will be published, one focused on St. Pete (January) and one on Clearwater Beach (August). These will remain online indefinitely.
 - Separate posts to the Travelhouse Facebook and Twitter platforms
 - A header image on the Facebook page will be VSPC-themed and remain online for four weeks.
 - **B2C eNewsletters** – January & August
 - Targeting the tour operator’s database of 65,000 subscribers, teasers and banners will focus on VSPC’s many highlights and benefits including a link to a dedicated landing page containing comprehensive content, imagery, logo and travel teasers.
 - The tour operator has been provided with all elements necessary for layout development for the print and online programs.
- KNECHT REISEN (Switzerland)
 - **B2B2C Catalog 2014/15** – December
 - The catalog will be launched in December and will be valid April 2014 to March 2015. Catalog circ. approx. 55,000. Several placements are planned including:
 - ✓ Banderole around the catalog with ‘St. Pete/Clearwater Top Beaches’ slogan.
 - ✓ VSPC logo placement on inside cover with ‘Top Beaches’ slogan.
 - ✓ Two editorial pages and two product pages.
 - **B2C “Top Beaches” Flyer** – November & January
 - Two-sided, full color flyer to be distributed at the tour operator’s annual “Travel Day” event this month (800 pcs.) and at consumer travel fairs in Bern, St. Gallen and Zurich (2,000 pcs.). VSPC imagery, logo, destination text and travel offers to be included.
 - **B2C eNewsletter** – February
 - The “Top Beaches” piece will be distributed to the tour operator’s database of 30,000 customers promoting special travel packages to VSPC.
 - **B2C “Top Beaches” Online Sweepstakes** – April

- For two weeks, customers will see a pop-up on the homepage announcing a sweepstakes. The prize will consist of one week's accommodations in St. Pete/Clearwater including flights for two sponsored by Edelweiss Air. The pop-up will link to a landing page containing sponsors' imagery, logo and product text. Sweepstakes questions will follow in the next depth level. Currently the tour operator's homepage enjoys 42,000 unique visitors monthly.
- **B2C Website "Top Beaches" Promotion** – April-June

Three months placement of VSPC imagery with travel teaser on the North America page of the knecht-reisen.ch website with link to a VSPC dedicated landing page. Focus on pushing business for fall and winter.
 - KUONI (Netherlands)
 - **B2C eNews** – December/January

VSPC will be highlighted as a top item in this eNews blast going to the tour operator's database of approx. 85,000 customers. VSPC will be incorporated with logo, which will link to a dedicated St. Petersburg/Clearwater destination page with packages, general information and tips on the area.
 - **B2B eNews Blast** – January

The Kuoni retail newsletter is sent every other week to 1,200 travel agencies. The layout is similar to the B2C newsletter. One main article will be dedicated to St. Petersburg/Clearwater.
 - **B2C2B Window flyers and POS material for travel shops** – January

Kuoni will place A4-sized flyers with special VSPC offers in the windows of their travel shops in Amsterdam and The Hague. Shops are located in highly frequented center city locations drawing several thousand passersby daily.

This month we provided the tour operator with our respective input and approved their layouts.
 - THOMAS COOK / NECKERMANN REISEN (Germany)
 - **B2B2C Window Display** – December/January

Large, eye-catching displays have been produced for placement in 380 top selling retail agency storefront windows. They consisted of VSPC key visuals, logo and travel offers and remain in the windows for a period of six weeks. Our co-op partners for this joint promotion are SeaWorld Parks & Entertainment and Lufthansa.
 - TUI SUISSE / FLEX TRAVEL (Switzerland)
 - **B2B TUI Newsnet Placement** – January/February

Newsnet is TUI Suisse's extranet for travel agencies, 850 of which access the platform on a regular basis. Counter info and flyers are uploaded to the Newsnet and are continuously updated. Opening click rate within the first 24 hours is 90%. VSPC will be featured twice (once in January, once in February) with comprehensive VSPC content including imagery, logo and a travel package.
 - **B2B2C Flyer** – February

The above initiative will be supported by a flyer sent to 850 agencies featuring VSPC destination text, logo, imagery and special offers.
 - **B2C Online Teaser Window** – February

VSPC will be featured in a teaser window on tui.ch for four weeks. The teaser box will link to a dedicated landing page with comprehensive destination content, imagery and logo.

The tour operator has been provided with all elements necessary for creative development.

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 was 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

- Blu Media Network (Germany) – circ. 120,000 *Consumer*
 - **1 page, 4c Ad in Mate Magazine** – 4/13 issue (Dec-Feb)
VSPC will be featured with a full-page GLBT-focused ad in this winter edition following the comprehensive advertorial feature of the area in the previous autumn edition. The publisher was provided with all elements necessary for creative production this month.
Blu media network (www.blu.fm; www.matediagroup.com) is a publishing house, event & marketing agency for the gay community within Germany, as well as the international market. Mate magazine is their high-end product with a diverse range of content features including the hottest trends in restaurants, architecture, wellness and travel.

- FVW's "Fit for USA" eLearning Program (Germany) – circ. 30,860 *Trade*
 - **Online travel agent training campaign** – November 2013-September 2014
"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 third 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.
We have supplied the editor with comprehensive information in preparation for the development of our VSPC training course including texts, imagery and logo. Layouts and content were quickly approved resulting in the course launch last month.

- TRAVEL INSIDE (Switzerland) – circ. 8,750 *Trade*
 - **1 page, 4c advertorial** in the USA Supplement Issue 1/23/2014
In conjunction with this year's Visit USA Seminar on February 5th, we secured placement of a half page advertorial for VSPC in their "Counter Inside" supplement. 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

- Visit USA Guide (Germany) – circ. 15,000 *Consumer/Trade*
 - **1 page, 4c advertorial**
The Visit USA Committee Germany is reproducing its 48-page USA Guide in cooperation with America Journal, which will feature general information on all 50 U.S. states. The guide will be distributed at travel fairs, in the U.S. Embassy and other U.S. related locations.

Online Aggregators:

- ASNM New Media AG Newsletter (Germany) – 740,000 German subscribers *Trade*
 - **Florida Newsletter Campaign** – Nov. 28 – Dec. 20, 2013 and Feb 2014
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 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 Panama City Beach, SeaWorld Parks & Entertainment, Visit Florida, Visit Tampa Bay and Alamo.
- Expedia (Germany) – 1.4 million German subscribers *Consumer*
 - **Placement Campaign** – Jan 13- Feb 28, 2014
With 2.09 million monthly unique visitors and more than 5 million impressions, Expedia Germany is the leading online travel provider in the country. VSPC will be featured on the Expedia Germany website and partner websites in different ways: core offers on the Expedia home page, teaser boxes on run of site as well as skyscrapers and teaser boxes on the flight+hotel and click&mix sites. This is a cooperation with Brand USA. Layouts were approved this month.
- Travelzoo Europe – 1.3 million German subscribers *Consumer*
 - **eNews Blast** – November/December
November 13th 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 were included and linked to applicable comprehensive content which will remain online for four weeks.

Public Relations:

Kaus Media Services - VSPC's German PR Agency

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

- **Press Release December:** Discussed featured subject, proofread and corrected.

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