

CENTRAL EUROPEAN OFFICE

N O V E M B E R 2013

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MARKET INTELLIGENCE / TRENDS

New Record for Tour Operator Sales

Tour operator sales in Germany hit a new record level this year and further growth is expected in 2014, according to the German Travel Association (DRV). German tour operators increased sales by between 3% and 3.5% to €25.2 billion in the year ending October 2013, the association announced at its annual conference in Salzburg. This was a lower growth rate than the previous year, but still represented a solid increase to a new record level. “Germans remained in a travelling mood this year and once again spent more money for their holidays,” DRV president Jürgen Büchy told delegates.

The number of customers booking a tour operator holiday was stable at 40 million, according to DRV’s initial results for this year. The difference to the turnover growth resulted from a combination of higher prices and stronger demand for high-value products. “Customers have developed a strong feeling for quality,” Büchy explained. “The price alone is no longer the decisive criterion. More and more customers expect quality for a fair price.”

The current winter 2013/14 season has started well with a 5% rise in sales. Büchy said he expected further growth in the new tourism year as the consumer climate is predicted to remain healthy.

In 2012/13, long-haul holidays sold particularly well with a rise of 4-5%. The potential for long-haul bookings is even higher, but is being held back by diverse factors such as the flight departure tax, currency fluctuation, high fuel prices and in part reduced flight capacity, according to the DRV. Thailand, the UAE and Caribbean islands all grew while the USA was “stable at a high level”.

Short- and medium-haul destinations grew well with a sales rise of 3.5-4% while overland travel destinations increased only 1.5-2.5%, the DRV said. Spain, Turkey and Tunisia all grew well and Greece achieved a clear comeback with a double-digit growth rate. In contrast, bookings fell for Egypt, Bulgaria, Italy and the Canary Islands.

Ocean cruises continued to grow this year with a solid 4% increase after years of high growth rates. In contrast, river cruises slumped by “a high single-digit figure” due to the widespread flooding this summer, strikes and higher VAT, Büchy explained.

Travel Agencies Defend Their Sales Dominance

Travel agencies again defended their status as the dominant sales channel in Germany this year with a new record turnover level. The combined turnover of physical and online travel agencies is expected to increase slightly to €22.8 billion this year from €22.5 billion last year, the German Travel Association (DRV) announced at its annual conference in Salzburg. This would be the third year in a row with a new record figure. The DRV does not break out sales between over-the-counter and online since many travel agencies are active in both segments.

Agencies specializing in leisure travel increased their sales by an estimated 1.5-2.5% this year thanks to the growth of the tour operator market, DRV president Jürgen Büchy said. More than 90% of the 40 million package holidays sold this year were booked at travel agency counters or on their websites, according to estimates by the DRV and market researchers GfK. In contrast, business travel agencies saw turnover decline by an estimated 4% due to fewer trips to European destinations.

The number of travel agencies in Germany declined further this year by 2.3% to 9,733 branches. The average turnover per agency branch grew slightly due to higher turnover being generated by fewer agencies. However, this was a slower rate of closures than in recent years and Germany still has one of highest density levels of travel agencies worldwide with 11.1 branches per 100,000 inhabitants.

Looking ahead to 2014, the DRV predicted further growth for the tourism-focused travel agencies due to good prospects for private consumption. The outlook for business travel is less clear, however, since firms react much more quickly to global economic trends, the association pointed out.

FTI: Racing Ahead With Double-Digit Growth

Germany's FTI Group increased revenues by a high 18% this year and plans to outgrow the market again in 2014 with further double-digit growth. The Munich-based group increased consolidated revenues by 18% to €2.1 billion in the year ending October 31. The core German tour operating business grew by 14% to €1.95 billion, which was about four times faster than the overall market growth, with summer bookings up 15%. Demand was strong for Turkey, the Canary Islands, Greece and the Orient region. The group's remaining €150 million revenues were generated by its other businesses, including the tour operator subsidiaries in Austria, Switzerland and France.

FTI's operating profits stagnated at €32 million, however, reducing the operating profit margin to 1.5%. CEO Dietmar Gunz explained that high investment in IT, hotels and the expansion of the incoming network of subsidiary Meeting Point along with the impact of Egypt had affected profits. But he stressed: "We are currently laying the foundations for future growth." Gunz underlined that FTI had financed all recent investments and acquisitions from its cash-flow and was debt-free. However, he aims to improve profits next year.

In 2014, FTI is targeting "low double-digit" revenue growth, according to sales and marketing director Ralph Schiller. The current 2013/14 winter season has "started promisingly" with an 8% sales increase. Demand is strong for the Canary Islands, the Orient, Turkey, Thailand and the Dominican Republic, while bookings for Egypt are slowly recovering.

For summer 2014, FTI will focus on its key destinations. “In the last two years we have expanded our destination portfolio strongly and have established ourselves as specialists, in particular for Egypt, the Emirates, Oman and the Canaries,” said Gunz. FTI is adding flights from northern Germany to the Canaries next summer, has increased capacity substantially for Turkey, Greece and Dubai, and is expanding its program for the emirate of Ras Al Khaimah.

In Egypt, where FTI sees itself as market leader, bookings dropped back to 300,000 this year after some 20,000 people cancelled bookings in August and September. The company has maintained capacity levels for next year after expanding the program strongly this year and is targeting a rise to 400,000 – 450,000 guests for the destination.

Prices will rise moderately next year, although this will depend on the destination. Short- and medium-haul destinations, such as Greece, Turkey, mainland Spain and the Orient, as well as overland destinations will increase by up to 3%. Prices for the Canary Islands will be stable while Egypt, Morocco and Tunisia will be cheaper. In particular, Egypt offers “sensational value for money”, according to Gunz. Long-haul holidays will be 3-4% more expensive.

DER Touristik: Cheaper Long-Haul Holidays

DER Touristik’s long-haul and individual holidays brands Dertour, Meier’s Weltreisen and ADAC Reisen are cutting long-haul prices for next year after low growth in 2013. The Frankfurt-based unit (‘DER Touristik Frankfurt’) increased sales by only 2% to €1.75 billion this year, but managing director Michael Frese said he is “extremely satisfied” with the result. “Without the events in Egypt and Syria, the summer bookings would definitely have been better,” he commented.

Bookings for short-haul destinations were strong, including Greece (+22%), Morocco, Montenegro, Tunisia (+40%) and Croatia (+18%). Long-haul demand was stable at a high level, with higher bookings for the Indian Ocean, Thailand, New Zealand, the Caribbean, Central and South America. The USA was stable despite the shutdown of national parks and museums in October.

For 2014, DER Touristik Frankfurt is targeting 3-4% sales growth. Early bookings are already showing a high single-digit rise. Long-haul destinations will be significantly cheaper next year thanks to the strong Euro while European destinations will be 2-3% more expensive.

The main product trends are an expanded city trips program and a larger Mediterranean program.

SALES ACTIVITIES

British Airways SpeedBird Club Promotion (November/December 2013):

This month our unique travel agent promotion with British Airways, Germany went online. Designed as an informative platform specifically for the travel trade, British Airways’ *SpeedBird Club Germany* currently boasts over 8,500 travel agent members. They are kept up-to-date on the latest developments and promotions by means of regular eNews blasts.

We joined forces with Visit Orlando to promote our products to the German travel trade for this special promotion, which also included a sweepstakes element. All told, the eNews blast

recorded 3,242 views, 1,202 clicks with a total of 531 respondents to the 10-question sweepstakes quiz.

Jan Doets In-House Reservations Agent Training (November 7th, 2013):

Together with Visit Orlando and SeaWorld Parks & Entertainment, we held a comprehensive training session for approximately 20 in-house reservations agents at Jan Doets America Tours. We also utilized the opportunity to conduct an in-depth meeting with the tour operator owner and key staff to update them on our area and products.

KUONI Netherlands B2B Workshop (November 8th, 2013):

We participated in the first-ever B2B workshop put on by Kuoni in The Netherlands in cooperation with Visit Orlando and SeaWorld Parks & Entertainment. In keeping with Kuoni's key values of sharing knowledge and expertise with B2B partners in an intensive and personal way; we held a comprehensive training session and participated in the table top marketplace session. The event took place in Amsterdam at the coveted Rosarium and was attended by over 50 agents.

Wereldcontact Reizen Travel Market (November 9th, 2013):

ITG/Wereldcontact again organized their Wereldcontact Travel Market held in 's-Hertogenbosch, Netherlands in which we participated in cooperation with Visit Florida.

This year's focus was to create an interesting experience for the visitors in that they "travelling" around the world by visiting presentations, walking through the different "continents", sharing experiences with past travelers and gathering valuable product information and travel inspiration from exhibitors.

At 2,200 visitors this year, attendance dropped off by 35% compared to last year. It also appeared that less USA-focused customers were attracted to the event this year. Thus, consideration is being given to participating in an alternative event in The Netherlands for next year.

Sales Training Road Show Belgium (November 26th-27th, 2013):

In the absence of a Visit USA seminar in Belgium this year, we joined forces with SeaWorld Parks & Entertainment on a 2-day sales training road show to top agencies and tour operator in-house reservations agents this month. We did not only focus on agencies with an affinity to Florida, but also identified those with strong potential for purposes of acquainting them with our fabulous product. The following tour operators and agencies were visited:

- **Generaltour, Herstal:** One of the major bus tours companies in Belgium in operation for over 50 years, the company owns 16 travel agencies in Belgium and Luxembourg. A separate tour operator division concentrates on escorted tours. Last year they launched the first edition of a USA & Canada catalog. Their main business is escorted tours, but the company has recently begun developing FIT and à la carte routings.
- **Euram, Leuven:** A major B2B online player in 3 markets: Belgium, France and the Netherlands. They developed a computer program which provides travel agents information on wide variety of products in Northern America and the Bahamas and enables travel agents to design à la carte itineraries.
- **Jetair, Zaventem:** Together with Thomas Cook, Jetair is one of the two major tour operators in the Belgian market. They offer a wide range of package holidays. The division presented to targets FIT and high end clientele with à la carte product. There are several divisions: Africa, Asia, Latin America and USA, Canada, Bahamas. The USA division is among the most significant and renowned for their escorted tours in Dutch (former VTB escorted tours). Two catalogs are produced annually: a summer USA/Canada brochure and a winter brochure featuring mainly New York, Florida and the

Bahamas. Their sister company Jetairfly will launch a direct fly to Miami twice a week with a 767 in spring 2014.

- **Connections, Vilvoorde:** Is a direct seller and probably the among the top players in the Belgian market. They offer a very wide variety of products targeting the independent traveler and produce several brochures featuring destinations worldwide and in U.S. Just last month, their first 2013/14 Florida catalog was released.
- **Wings 'n Wheels, Meise:** Known as the USA specialist in the Belgian market, the company's success is attributed to the leadership and extraordinary experience of the Managing Director, Lucrese Vanneste as well as the in-depth knowledge of the company's staff. Focused on tailor-made holidays, the company is among the country's top tour operators and is highly regarded by Belgian travel agencies. Four catalogs are produced annually: USA, Canada, Hawaii and Alaska.
- **USA Travel, Brussels:** Another important player in the Belgian market, this company is a niche tour operator offering a wide variety of products in the U.S. and Canada. They specialize in tailor-made holidays and escorted tours. They publish three catalogs annually: USA, Canada and most recently, a separate brochure for New York.
- **Thomas Cook, Gent:** Together with Jetair, Thomas Cook is one of the two major tour operators in the Belgian market. As far as the U.S. and Canada are concerned, they are now developing a more intensive focus to this product line. Product was initially launched as direct-sell and is now bookable by all travel agents.
- **Travel Experience, Grobbendonk:** A relatively new tour operator on the market, the company's sales focus is B2B sales. The owner is very experienced in the U.S. business as he also runs the agency USA online. Two years ago, he launched a special Florida product line.

We held an introductory destination presentation at all above companies and trained sales staff on our USP's, features and benefits. Our Gulf to Bay magazine was distributed and our imagery link was made available for inclusion in their new programs.

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 this 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! Sponsors' images and logos have been forwarded to the publisher.

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 were completed this month.

Of note is that Visit Florida will not be organizing 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. Visit Florida has scheduled a meeting in December to discuss details of the 'featured destination' elements.

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 information was received from Visit Florida last month, upon which we followed up with our industry partners to confirm their participation commitment. Two hotel partners indicated interest. By the registration deadline the end of last month, one partner was secured. Our official registration with Visit Florida ensued. A second partner registered this month post deadline, resulting in the necessity to submit revised registration documentation to Visit Florida.

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. 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 it 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 this 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 last month'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 now been secured. The tour operator advised flight pattern details this month, which were forwarded to HQ promptly. The tour operator initially requested provision of an itinerary due this month, but has revised the deadline to January. Further updates to be forthcoming.

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.

This month we received the requirement specs from the tour operator. We provided 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.

• 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.

This month we supplied the tour operator with initial elements 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 was provided with all elements necessary for layout development for the print and online programs.
- JAN DOETS (Netherlands)
 - **B2C Telegraaf Online Network** – November
Holland's daily "Telegraaf" newspaper is an important Jan Doets partner with 3 million readers per day. Over the years, the Telegraaf has added online companies to its network, which currently comprises 29 very powerful websites boasting 5 million page views per month.
Banner advertising will be placed on all 29 Telegraaf network websites for four weeks and will include our logo, imagery, travel offer and dedicated landing page.
 - **B2C eNewsletter Blasts** – November & February
Jan Doets travel offers to VSPC will be distributed twice to 21,000 jandoets.nl eNews subscribers and will include our logo and imagery.
 - 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.
This month catalog pages, banderole and flyer were created and produced.

- THOMAS COOK / NECKERMANN REISEN (Germany)
 - **B2B2C Window Display** – December/January
Large, eye-catching displays will be produced for placement in 380 top selling retail agency storefront windows. They will consist 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 will be SeaWorld Parks & Entertainment and Lufthansa.
This month the layout was approved and production started.

- 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.
This month we provided the tour operator with all elements necessary for creative development.

Travel Trade/Consumer Publications:

- Blu Media Network (Germany) – circ. 120,000 *Consumer*
 - **2 pages, 4c Advertorial in Mate Magazin** – 3/13 issue (Sep-Nov)
A North America special is planned for the autumn edition of this high-end GLBT magazine. We are proud to report that VSPC will be the only Florida destination featured, thereby standing out nicely. Other destinations include New York and Canada.
We provided the publisher with our logo, destination text and a selection of images. Their layout then was proofread, corrected and approved.
 - **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.

- Brand USA Multi-Channel Campaign (Germany) *Consumer*
 - **1 page, 4c Advertorial in a 16-page Supplement Piece** – distributed in ...
 - **Geo Saison magazine** – November Issue – circ. 143,000
GEO SAISON is the market leader in the sector of multi-topic travel magazines with 600,000 readers per issue. GEO SAISON enjoys an affluent readership, which seeks quality and diversity in their travel decisions.
 - **Frankfurter Allgemeine Zeitung** – November 14th
The FAZ is one of several high-profile newspapers in Germany and among these, has the second largest circulation nationwide. The FAZ is distributed nationally with a daily circulation of 395,500 copies in Germany and 40,000 copies outside the country (for an overall readership of its German and English editions of approximately one million people).
 - **Discover America’s Facebook page** – November/December – 12.3 mil. Impr.
This web campaign will traffic on the publications’ online resources. Promotion is also planned on DiscoverAmerica.com and its social channels. Traffic will be driven to either a custom landing page or digital version of the insert. Both will link visitors directly to VSPC’s website.
 - **2 x eNews blasts** – November 12th & 28th – 1 million customers
Two emails will be deployed during the 6-week digital campaign. Active travel databases will be utilized to develop a targeted email list. Traffic will be driven directly to VSPC’s website.

- FVW’s “Fit for USA” eLearning Program (Germany) – circ. 30,860 *Trade*
 - **Online travel agent training campaign** starting November 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 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 this month.

- 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.
- 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 November:** Discussed featured subject, proofread and corrected.

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