

CENTRAL EUROPEAN OFFICE

N O V E M B E R 2019

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MARKET INTELLIGENCE / TRENDS

Thomas Cook Germany Heads for Shut-Down with 1,000 Job Losses

Thomas Cook Germany could close down on December 1 with about 1,000 job losses after failing to find a buyer, but some of its tour operator and hotel businesses might be sold off separately, saving about 1,000 other jobs. Thomas Cook Touristik GmbH, the holding company for Thomas Cook's activities in Germany, will probably officially stop trading on December 1, according to a statement from its insolvency administrators. Despite intensive talks, no investor has been found for the company as a whole, with some 2,100 employees, or for its overall tour operator business. As a result, the company, based in Oberursel, near Frankfurt, is now preparing to close down operations as of December 1, 2019. Fabio Algari, the company's provisional insolvency administrator, said: "Six weeks ago we started a very ambitious process with the aim of finding an investor for the entire German Thomas Cook group. But despite tireless negotiations time is now against us, so that at the present time there is no actual offer for the tour operator business of Thomas Cook Touristik GmbH." It was further emphasized that "Thomas Cook Germany is a profitable tour operator and has been blamelessly dragged down by the insolvency of its British parent company."

Meanwhile, Thomas Cook Germany's insurance company Zurich Versicherung expects to start paying out compensation in December to customers affected by the company's insolvency in late September. But it is unclear how much they will get back as the overall size of the damages is not yet known, according to a spokesman. However, the company's insurance protection sum of €10 million will definitely be nowhere near enough to cover all the claims of the 660,000 customers with open bookings at the time of the insolvency. As of November 1, a total of 150,000 claims totaling €250 million had already been made, the Zurich Versicherung spokesman disclosed.

German Tourism Industry Looks Ahead to post-Cook Future

The tourism industry needs to re-establish consumer trust in package holidays and ensure fairer business relationships in response to the Thomas Cook insolvency, top German managers agreed during an fvw round-table discussion.

"We have to fight for the package holiday," declared T. Bösl, who heads the RT-Reisen travel agency group. "It's difficult to say how much the image of the package holiday has been damaged." According to various statistics, the organized travel industry (tour operators and travel agents) accounts for over half of all German holiday bookings, with direct consumer bookings with suppliers or through online portals making up the rest.

"We're not just talking about one company going bust, we're talking about the entire industry," admitted DER Touristik CEO S. Hartmann. But he stressed: "We're seeing the fate of one single tour operator, not the improper behavior of an entire industry." The long-serving tourism chief defended the advantages of package holidays, which provide security for customers "not just in crises but also when something goes wrong".

Schauinsland chief G. Kassner also supported this argument, urging fair business practices between suppliers, tour operators and travel agents, and said travel agents should "recommend partners who are (financially) solid".

All the discussion participants agreed that the German tour operator insolvency insurance law would have to be reformed in the wake of Cook's collapse, which had shown that €10 million was far too low as an insurance sum. But opinions varied whether premiums should simply be increased or a new model was necessary. Kassner warned against radical steps, saying: "Future premiums should not be too high for the market." Hartmann called for the financial situation of tour operators to be given more importance in future. "The higher the risk, the more the tour operator should pay," he said.

Condor, Eurowings and TUIfly Increase Flights to European Holiday Destinations

Germany's three main leisure airlines are all adding new holiday destinations in various European countries next summer to boost their networks.

Condor will take off to the Côte d'Azur for the first time, add new destinations in Montenegro and on Cyprus, and also increase some of its existing frequencies to Greece, Mallorca and the Canary Islands. From Frankfurt, the airline will fly three times a week to Toulon, serving destinations along the Côte d'Azur, and operate twice-weekly services to the Montenegrin port city of Tivat. There will be new twice-weekly flights to Paphos on Cyprus from Frankfurt, Munich, Düsseldorf and Leipzig. Condor will also add more flights from various German airports to the Greek islands of Mykonos, Samos and Santorini, as well as to Gran Canaria, Tenerife and Fuerteventura. The airline has rescheduled capacity away from Turkey, Tunisia and Italy for these new and additional flights.

Eurowings will expand flights significantly next summer from Hamburg, Stuttgart, Dusseldorf and Cologne to a mix of city and beach destinations. From Hamburg, the Lufthansa budget airline will offer eight new destinations – Gothenburg, Oslo, Prague, Valencia, Malaga, Gran Canaria, Fuerteventura and Larnaca – and increase flights to Thessaloniki. From Stuttgart there will be new flights to Bucharest, Belgrade, Florence, Kos, Malta and Jersey, while Malaga is a new route from Cologne. The Düsseldorf schedule will be expanded with new routes to Gdansk, Sofia, Verona and Santorini, along with more flights to Barcelona. Eurowings will service Orlando 3x/week from Munich starting April 2020.

For its part, **TUIfly** is increasing capacity significantly next summer from Nuremberg, where a second plane will be stationed, with new flights to Palma and Corfu and more frequencies to Crete, Rhodes, Gran Canaria and Hurghada. However, with seven stationed planes, Düsseldorf will remain the airline's biggest departure airport next summer with total capacity of 815,000 seats on nearly 100 weekly flights to 24 destinations. Meanwhile, TUI Germany will increase flight capacity to the Dominican Republic by 50% next summer with three new weekly full charter Eurowings A330 flights from Düsseldorf to Punta Cana between May and October. However, TUIfly is considering launching its own long-haul flights with B787s in winter 2020/21 to take advantage of new market opportunities, according to fvw information.

Consumer Climate Improving

Findings of the GfK Consumer Climate Study for November 2019

Consumer sentiment picked up again in November. Both economic and income expectations have seen a marked increase. Propensity to buy has remained at a very high level despite marginal losses. As a result, GfK has forecast a figure of 9.7 points for December, 0.1 index points higher than November's level (9.6 points).

Known risk factors such as the global economic slowdown, trade conflicts and the chaos surrounding Brexit have resulted in a slight drop in the consumer climate when compared to the same period last year. Nevertheless, the indicator's level can still be described as highly satisfactory while propensity to buy remains stable. The exceptionally high levels of consumer confidence among German consumers have significantly contributed to preventing a recession in Germany in the third quarter. Private consumption has thereby perfectly fulfilled its role as an important pillar of the economy.

Economic outlook significantly more favorable: Consumer expectations have seen a noticeable improvement in November, bringing an end to the downward trend – at least for the moment. The indicator gained 15.5 points compared to the previous month, climbing to 1.7 and putting it just slightly higher than its long-term average of zero points. A more significant increase in this economic indicator was last seen more than nine years ago in June 2010, when it rose by nearly 33 points during a recovery phase following the biggest recession in post-war history. According to preliminary figures from the Federal Statistical Office, the German economy grew by 0.1% in the third quarter when compared to the previous period, defying expectations. Many experts had predicted a slight contraction. This decline in pessimism is most likely due to the trade war between the US and China showing tentative signs of easing during recent days. In addition, it is clear that an increasing number of Germans are hopeful that a decision on Brexit will be made after the forthcoming elections in the UK.

Income expectations benefit from a decline in economic pessimism: In the wake of a marked improvement in the economic outlook, income expectations also showed an increase in November. The indicator gained 6.5 points and now stands at 45.5, an increase that almost completely compensates for the losses recorded in the previous month (-7.8 points). Consumers continue to remain highly optimistic about the development of their future financial position. This income optimism is the result of the employment situation, which remains favorable, and the positive development of labor earnings and pensions associated therewith. Income expectations have been further strengthened by price trends. According to the German Federal Statistical Office, inflation dropped to 1.1% in October, a decline from its previous levels of 1.2% in September and 1.4% in August. Lower inflation rates strengthen the buying power of consumers.

Propensity to buy remains at a very high level despite marginal losses: Despite a weakening economy and the risk factors mentioned above, consumer confidence among German consumers remains unaffected. Propensity to buy continues to enjoy a very high level even though the indicator suffered a minor decline in November, losing 1.7 points to reach 50. Future propensity to buy will also be boosted by the monetary policy of the European Central Bank (ECB). As a result of the ECB's renewed extension of its low-interest-rate policy, private investors face the increasing threat of having to pay penalties when investing their money with banks or savings banks. This may be incentive enough for

some who would otherwise save their money for a rainy day to spend their money or purchase more.

SALES ACTIVITIES

USA-Canada Experience Netherlands (October 31st - November 1st, 2019):

The “*USA-Canada Experience*” is a two-day travel trade event giving supplier partners an exceptional opportunity to inform and educate the Dutch travel trade and conduct one-on-one sales meetings directly with product managers and tourism managers. A full-day workshop saw us holding comprehensive training sessions for over 120 agents from all over The Netherlands. The event culminated in an exciting contest and travel prize raffle. Thanks to the generosity of our VSPC industry partners, we proudly presented two 3-night stays at two properties, giving us yet more exposure and ranking us among the top prize donors during the raffle! We assisted the prize winner with her travel plans to our area this month.

Visit USA Austria Seminar (November 14th – 15th, 2019):

Known as Austria’s premier travel trade event, the Visit USA Seminar Austria was held in Vienna attracting 100 qualified travel advisors. The format comprised a comprehensive educational seminar in the afternoon followed by a table top marketplace, an on-stage “interview” session with each supplier partner and an ensuing evening event. Travel advisors were enthused by our educational session, flocking to our table during the table top marketplace thereafter to gather yet more information and insider tips.

The Visit USA Committee Austria organized a post-seminar “evaluation breakfast” during which we had the opportunity to provide feedback and discuss future planning.

FTI Touristik Familiarization Tour (November 15th – 17th, 2019):

Germany’s FTI Touristik brought a group of highly qualified travel advisors to Florida this month to showcase the east and west coasts of the State as well as Orlando.

In cooperation with Best Reisen, a consortium of strong German travel agencies, FTI selected 12 travel advisors on the basis of their North American turnover at FTI, with Florida producers being given particular consideration. The group traveled in rental cars, starting in Fort Lauderdale (11/13-15) and ending in Orlando (11/17-19). Due to our exceptional relationship with this top tour operator, we are exceedingly pleased to have secured a visit to our destination ... as the only one to be showcased on Florida’s west coast. The beginning of this month saw us liaising closely with our Leisure Sales department on finalizing the itinerary and several additional logistics.

The tour operator reported the travel advisors were not only impressed by the very warm welcome, but also amazed by the well thought-out itinerary coupled with comprehensive additional information received on the myriad experiences available in our area.

Travel Trend VIP Clients (November 20th – 22nd, 2019):

Top Dutch tour operator Travel Trend alerted us to VIP clients scheduled to visit our area this month. We liaised with our Leisure Sales department regarding provision of a special welcome amenity and complimentary admission tickets to one of our popular attractions. The tour operator reported their clients were most appreciative of the warm welcome and special treatment.

Knecht Reisen “Reisewelten” (November 23rd – 26th, 2019):

Following the tremendous success of the past “Reisewelten” (“Travel Worlds”) events held in 2015 and 2017, prominent Swiss tour operator Knecht Reisen orchestrated their third Reisewelten event this year. The four-day show comprised a two-day consumer exhibition attracting close to 4,000 visitors. With 1800m² exhibition space available at Knecht Reisen headquarters in Windisch, Switzerland, the consumer show included various impressive “themed worlds” such as South Pacific, Africa, Latin America, North America, cruises, recreational vehicles and sports travel. Following the consumer session in Windisch, another full day was dedicated solely to the travel trade and focused exclusively on North America. This B2B session was held in Lucerne at the “Verkehrshaus”, a museum bringing Switzerland’s mobility elements (road, rail, water, air) to life. Comprehensive interactive training seminars were conducted for over 50 highly qualified travel advisors.

The next “Reisewelten” event is scheduled for the fall of 2021.

Visit Florida Road Show (Dec 2nd – 5th, 2019):

We will participate in the Visit Florida Road Show in two Swiss and two German cities this year: Zurich, Basel, Heidelberg, Frankfurt. German tour operator FTI Touristik will be our coop partner. Evening events will comprise comprehensive travel advisor training sessions in the more intimate roundtable format and will culminate in an exciting prize raffle. In Switzerland, we will also conduct in-house travel advisor trainings at Hotelplan Suisse and DERTour Suisse (formerly known as Kuoni) during the morning hours.

A training tool ‘workshop booklet’ will be produced by Visit Florida for which we have provided applicable material (content, imagery, logo). In addition, an interactive digital knowledge test will be staged immersing agents in yet more destination detail. We have supplied Visit Florida with all necessary assets, finalized shipping and travel arrangements.

Florida partners participating are: Crystal River, Florida Keys, Kennedy Space Center, Naples, Sarasota, SeaWorld Parks & Entertainment and Universal Orlando Resort.

Consumer Shows (January & February 2020):

Our area will be presented at several important consumer shows in Germany, the Netherlands and Belgium in cooperation with the Visit USA Committees as well as a selection of tour operator partners.

Registrations have been completed for the following tourism fairs attracting 897,300 consumers cumulatively:

• CMT Stuttgart (DE)	January 11-19, 2020	260,000 visitors
• Vakantiebeurs (NL)	January 15-19, 2020	103,300 visitors
• Vakanz (LU)	January 17-19, 2020	29,000 visitors
• ABF Hannover (DE)	January 29-February 2, 2020	90,000 visitors
• Reisen Hamburg (DE)	February 5-9, 2020	80,000 visitors
• Brussels Holiday Fair (BE)	February 6-9, 2020	100,000 visitors
• f.r.e.e Munich (DE)	February 19-23, 2020	140,000 visitors
• R & C Essen (DE)	February 26-March 1, 2020	95,000 visitors

We expedited shipping arrangements for shows taking place in January this month. In addition, we supplied content, imagery and logo for a special sales flyer being produced by See America in the Netherlands for distribution at the Vakantiebeurs ‘Best of Florida’ stand.

Visit USA Seminar Switzerland (February 4th – 5th, 2020):

This program is Switzerland’s premier travel agent training seminar held annually in Zurich. The seminar platform provides the local travel trade with insider knowledge as well as the needed contacts and sources of information. An estimated 350 travel advisors are expected to

attend this important Swiss event. Registration has been completed. Further preparatory tasks are underway.

ITB (March 4th – 8th, 2020):

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. Strategic planning and logistics management are underway. Updates to be forthcoming.

Additional Activity:

- **Tauchen und Reisen Kriz** in Ingolstadt, Germany was provided with comprehensive destination information, insider tips and collateral material for distribution to their clientele during a special Christmas event the travel agency will be holding next month.
- **Website Requests for Destination Magazines:**
9 requests received via the crm@simpleviewinc.com platform this month.

MARKETING INITIATIVES

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

Brand USA ‘Affinity’ Co-Ops:

- **EXPEDIA AFFINITY PROGRAM** (January 15th - March 31st, 2020)
Expedia’s network of sites attracts a monthly audience of tens of millions of unique visitors. With Expedia being our activation partner for this campaign, we will focus on an integrated marketing approach to engage consumers with the right messaging at the right time with a view toward driving activation.
The campaign comprised of **banner placements** linking to a **dedicated landing page** (containing destination content, video and travel offers) will run in three countries across the Expedia Brands Portfolio. Based on market intelligence related to booking behavior, budget allocation will be as follows: Germany 75% (placing 85% on Expedia / 15% on Hotels.com; Switzerland 15% (with 100% placement on Hotels.com), The Netherlands 15% (with 100% placement on Expedia).
We received required specs and deadlines from Lan Luu (Senior Campaign Manager at Expedia) this month and worked closely with VSPC HQ regarding provision of assets required for creative development of banners and landing page.

Brand USA ‘Originals’ Co-Ops:

- **FALL GERMAN MULTI-CHANNEL CAMPAIGN** (November/December)
After a very successful fall campaign last year, we will continue our cooperation with Brand USA and Expedia in 2019. Germany is one of the top volume markets to the U.S. and Brand USA continues to provide partners with innovative international marketing opportunities. This multi-channel campaign is designed to reach consumers at the right time, with the right message and in the right place. The new digital media channels provide an integrated marketing approach to engage consumers and ultimately drive activation.

- **Mobile Takeover Unit:** 200,000 est. impressions / hero image & click-through to destination content
 - **GoogleDisplayNetwork Traffic Gen:** 4,000 clicks
 - **Facebook Carousel Ad Unit:** Added value, Tile 3 or 4 position in one unit
 - **Expedia Activation Partner Marketing:**
 - Dedicated hotel results page (one page per co-op)
 - 415,000 co-branded display ads driving to a hotel search results page
 - Inclusion on “Visit The USA” landing page linking to our hotel search results page
- All required assets have been delivered, creatives reviewed and approved.

VISIT FLORIDA Co-Ops:

- **CANUSA TOURISTIK** (November 2019/June 2020)
 We are pleased to have the opportunity to cooperate with Visit Florida on marketing initiatives with CANUSA Touristik this fiscal year.
 Additional Florida partners are: Florida Keys, Fort Lauderdale and Sarasota.
 - **B2C CANUSA Magazine** – November 2019
 All partners will be featured in CANUSA’s print magazine with image, logo and content. The magazine will be mailed to 30,000 consumers.
 - **B2C CANUSA Newsletter** – December 2019
 This newsletter with VSPC placement of image, logo and content will be deployed to 50,000 consumers.
 - **B2C Ad Placement in GEO Saison Magazine** – January 2020
 VSPC will be featured with a ½ page ad placement including logo, image and content in the January issue of GEO Saison magazine, a high-end travel publication.
 Pub frequency: monthly / circ. of 60,333.
 - **B2C Out-of-Home Bus Wrap**– February-June, 2020
 VSPC will be featured with imagery and logo on a bus wrap within the Hamburg transit system for 5 months. Estimated impressions: over 1M
 Images and logo for creative development have been delivered; layout for the Canusa Magazine was developed and approved this month.
- **WEG.DE** (October-December 2019)
 Another opportunity with Visit Florida is a three-month campaign with OTA weg.de. Participation limited to three Florida partners only, so we are very pleased to have secured one of the spots. Additional Florida partners are: Crystal River and Fort Lauderdale
 - **B2C Landing Page**– October-December, 2019
 A dedicated Florida landing page will feature content and at the same time function as the booking tool with travel teasers. The microsite will comprise a general Florida overview as well as information about each partner’s destination.
 - **B2C Social Media Campaign** – October-December, 2019
 Weg.de will launch a promotional post tailored to visibility on social media and YouTube. The post will link to a dedicated landing page. Image/Video will be provided by VISIT FLORIDA. Campaign partners will be featured with imagery and logo within the video.
 - **B2C Video Banner** – October-December, 2019
 A video banner will be played on 3rd party media sites which are the right fit for relevant target groups. A general Florida video (including VSPC frames) will be shown and partner logos will be featured.

All assets for creative development have been delivered. The campaign is currently live.

Tour Operator Co-Ops:

- **CANUSA TOURISTIK PROMOTION PACKAGE** (January 2020-open ended)
We have joined forces with Canusa Touristik on an innovative digital campaign focused on attracting new customers and raising awareness for VSPC on several platforms:
 - **You Tube Video Creation** – January 2020-open ended
A professionally produced YouTube video will tell a relevant and appealing destination story. CANUSA will create two versions of an exclusive video: 60-180 second master YouTube video and a 20-30 second teaser video for Facebook and Instagram promotions.
 - **Social Media Promotion Premium** – January 2020
The goal is to reach regular CANUSA fans and followers with editorial posts as well as new customers with social media ads. Existing content on the CANUSA website will be combined with attractive, representative travel packages in individual recommendation ads.
75,000+ fans on Facebook plus 5,900+ followers on Instagram plus relevant hashtag reach. Approx. 150,000 ad impressions on Facebook and Instagram are targeted.
All required assets have been delivered.

- **FTI TOURISTIK ACADEMY** (March-December 2019)
We are excited to be part of FTI's very successful eLearning academy together with 3 additional Florida partners: Greater Fort Lauderdale, Naples, Marco Island & Everglades and Sarasota. Themed as "Florida's Best Beaches!", each destination partner is presented on 3 pages containing comprehensive content, imagery and video. Upon completion of the eLearning modules, travel advisors receive a certificate confirming their expertise.
The FTI Academy is one of the most prominent and among the largest tourism eLearning vehicles in the German and Austrian markets. The educational program is promoted via several channels such as newsletters, press releases and raffles. Furthermore, it will be accessible 24/7 for 8 months!
Status to date: Close to 1,650 travel advisors have completed the St. Pete/Clearwater eLearning modules.

- **FTI TOURISTIK MULTI-CHANNEL CAMPAIGN** (November 2019-February 2020)
In cooperation with FTI – among Germany's top tour operators – and Brand USA, we are launching a campaign for deployment on several platforms:
 - **FTI B2B ONLINE PACKAGE** – November 2019
 - **Teaser in B2B FTI Newsletter:** Teaser with image and logo in the B2B newsletter will link to a dedicated VSPC landing page. Deployment to approx. 9,600 FTI agencies.
 - **Banner on FTI Service Page:** 4-week run of banner with image and logo on FTI's homepage linking to the dedicated VSPC landing page.
 - **Landing Page:** Dedicated landing page on www.fti.de with content, imagery, logo, video and 6 attractive travel offers (linked to internet booking engine).
 - **EXTENDED SOCIAL MEDIA PACKAGE PREMIUM** – November-December 2019
Advertisement will be placed on FTI's Social Media channels (owned & paid media) as well as display advertising:
 - **2 x Facebook Posts:** including logo integration. 68,800 Facebook fans.
 - **Instagram Post:** including special hashtag. 13,000 Instagram subscribers.
 - **Instagram Story:** including logo & special hashtag. In addition, the story will be featured in the FTI channel highlights for one week.
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- **“THE TRAVEL SHOW” RADIO** – February 2020

VSPC will be featured with 6 x 3:30 minutes (21 minutes) airtime in pure interview format, 2 x 3:30 minutes (7 minutes) for introduction and farewell (partner is mentioned here and can greet the listeners).

Radio Show broadcasted on the following radio stations on weekends:
 Radio 700 - Aachen , Antenne Frankfurt, Antenne Kaiserslautern, Antenne Bad Kreuznach, Antenne Idar-Oberstein, Antenne, Landau, Antenne Pfalz, Radio Saarbrücken , Radio Homburg, Radio Neunkirchen with a total reach of approx. 7.8M listeners.

Layouts for the online packages have been created and approved and went online this month.

- **HOTELPLAN SUISSE** (Switzerland)

Together with Hotelplan – one of Switzerland’s top tour operators – and Brand USA, we have created a B2C newspaper and B2B2C travel agency campaign:

 - **SONNTAGSZEITUNG** – Jan. 12th, 2020

The SonntagsZeitung is Switzerland’s largest Sunday newspaper featuring relevant news, entertainment, attention-getting topics from the fields of politics, sports, culture, business, science, trends and travel. Print run: 152,566 / Readership: 518,000.

VSPC will be featured with 2 snappy travel offers and logo on this 95x440 mm format.
 - **STOREFRONT DIGITAL SCREENS IN RETAIL SHOPS** – January 6th-19th, 2020

VSPC will be featured with an attractive travel offer, imagery, logo and short destination video on 71 digital storefront screens throughout Switzerland in three languages (German, French and Italian). Run rotation is 3 times per hour during retail agency store hours.

- **KNECHT REISEN** (Switzerland)
 - **Jelmoli Campaign** – January – July 2020

VSPC will be the travel partner in the new Miss Jelmoli contest. In March 2018, «Miss Switzerland» was elected for the last time. In 2019, the rights of the organization were acquired by the fashion company JELMOLI, one of the leading and most successful players in the Swiss fashion market with a new «Miss Jelmoli» having been elected. In 2020, the contest will be held anew – with a new focus on travel – with VSPC having been selected as the preferred destination partner in cooperation with Edelweiss Air and Knecht Reisen.

The campaign will include several phases with following timeline:

 - January-July 2020: Total campaign runtime
 - January-March 2020: Motivation phase with contest teaser
 - April 2020: Voting phase and selection of «Miss Jelmoli 2020» winner
 - May 2020: Winner trip to St. Pete/Clearwater

January-March:

 - **Online Store Photo Drawing:** VSPC will be featured with key visual and logo on Jelomoli’s online store www.jelmoli-versand.ch during this photo drawing motivation phase. Average of 140,000 visitors per week.
 - **Standalone Newsletters:** 2 standalone newsletters, one in January/one in March, promoting the contest and coop partners will be deployed to 150,000-200,000 subscribers per newsletter. Average opening rate: 27%.

March-July:

- **Online:** Presentation of Miss Jelmoli winner in Jelmoli-Versand's online store "Miss Jelmoli-Versand 2020" (www.jelmoli-versand.ch) including VSPC key visual and logo.

January&May:

- **Print Catalog:** Direct mailing containing the Miss Jelmoli contest with imagery and logos. First direct mailing with ad size of 210x240mm will go out to 'best customer' target group (print run: 80,000)
Second direct mailing with ad size of 183x218mm within a beach fashion theme will go out to new potential customers (print run of 1,000,000).

January-July:

- **eNewsletters:** The Miss Jelmoli contest will be featured in five newsletters including coop partners' imagery and logos. Average opening rate 25%.
- **YouTube Trailer:** New trailer for the contest will be featured on Jelmoli-Versand's YouTube channel for Miss JelmoliVersand 2020 including our imagery and logo. Estimated reach: over 1M views.
- **Facebook Posts:** Minimum of 5 posts including our logo and imagery placed on www.facebook.com/jelmoliversand with several topics/stages such as motivation for photo drawing, winner presentation and winner trip. 22,800 followers.
- **Instagram Posts:** Minimum of 5 Instagram posts with our logo and imagery will be featured on new Miss Jelmoli-Versand Instagram channel with same topics as on Facebook: motivation for photo drawing, winner presentation and winner trip.

All required assets have been delivered.

On top, our tour operator partner **Knecht Reisen** will support the campaign with additional online activities on their platforms:

- **Newsletters:** Knecht Reisen will include the Miss Jelmoli contest with all coop partners including logos and imagery in two of their newsletters during the campaign period of Jan-Jul. 55,000 subscribers. Opening rate of 30%.
- **Facebook Posts:** 3 posts including our logo and imagery will be placed on Knecht Reisen's Facebook page. 3,000 followers.
- **Instagram Posts:** Knecht Reisen will also publish 3 posts with our logo and imagery. Over 700 followers.

- **TRAVELHOUSE** (Switzerland)

Together with Travelhouse – one of Switzerland's top tour operators – and Brand USA, we have developed a consumer and social media campaign:

➤ **ANNABELLE MAGAZINE** – Jan. 19th-Feb. 1st, 2020

Annabelle is Switzerland's most prominent magazine for women reaching a readership of urban, well-educated women with high income and great interest in fashion, cosmetics, design, culture and travel.

- **Online Advertorial** including destination content, imagery and logo as well as link to Travelhouse website. Reach: 202,000 unique users/month.
- **Newsletter Teaser:** VSPC will be integrated in an Annabelle eNewsletter with travel teaser. 27,500 subscribers.
- **Facebook Post:** VSPC will get a post on their Facebook page with 16,568 fans.

All required assets have been delivered.

- **TRAVELHOUSE** (Switzerland)
 - **TRAVELHOUSE PLATFORMS** – January to February, 2020
 Within the Travelhouse online structure, VSPC will be featured on several platforms:
 - **Social Media (January-February 2020):** Facebook ads with VSPC offers in German and French linked to a dedicated landing page. Fans: 14,000. Average monthly reach: 46,000. Average interacting fans: 3,500.
 - **Online Banner (February 2020):** An eye-catching banner will be placed on different websites including image, logos and link to a dedicated product landing page. 250,000 impressions expected.
 All required assets have been delivered.

- **TUI GERMANY** (January - May)

We are pleased to have again worked out great marketing initiatives with TUI Germany:

 - **B2B Instagram Story & Raffle** – January
 VSPC images and videos as well as short content bursts and logos. Link to the TUI Newsnet article will be mentioned in the text. To make it more enticing, a raffle will be included to win TUI travel coupons. Users: approx. 1,787 travel advisors.
 - **B2B TUI Newsletter Teaser** – January
 VSPC will be one of the current topics in the TUI newsletter directed to 17,000 TUI travel advisors. Teaser will be linked to the TUI Newsnet article.
 - **B2C TUI.com Weekly Integration** – February + May
 The TUI.com Newsletter is deployed on Fridays to all subscribers and travel agencies with a newsletter subscription. It informs about news, offers, specific destinations, etc. VSPC will be featured with 2-3 offers, logo and link to a dedicated landing page on the TUI site. Reach: 600,000 subscribers. Average opening rate of 22,4 %.
 - **B2C TUI.com Hero Teaser** – February
 VSPC will be featured prominently with hero teaser on TUI.com/USA landing page including image, logo and link to TUI.com booking engine to convert bookings directly or link to VSPC landing page. TUI.com has approx. 20 million page views per month.
 - **B2B2C Instore TV Communication** – January
 With this regionalized offer and image advertising on 280 flat screens in shop windows of selected TUI travel agencies, we will be featured in prime locations in Germany. The daily rotation (ø 10 hours) will display destination information, images, videos, sales offers and flash animations. The transmission loop of max. 6 minutes in length will be repeated 10 x per hour. Approx. 1 million impressions are expected during the 3 week run time.

- **USA REISEN** (December)

Together with a very engaged USA tour operator we developed a special VSPC marketing package for placement on several platforms:

 - **Landing Page** – December 2019
 Dedicated landing page on www.usareisen.de/hotels with comprehensive destination content, imagery, logo and attractive travel offers, such as creation of new packaged tour (e.g. hub and spoke package, family beach vacation package – St. Pete/Clearwater exclusively).
 - **B2C Destination Standalone eNewsletter** – December 2019
 This exclusive eNewsletter will be set up like a travel guide accompanied by matching offers such as the new packages and hotel deals. It will include logos and contain a minimum of eight info boxes linked to the VSPC landing page.

- Reach: approx. 60,000 subscribers and customers with specific interest in traveling to the U.S. Average opening rate is 31%.
 - **B2C Homepage Banner** – December 2019
The homepage banner will highlight one of the VSPC packages labeled as “Mitarbeiter-Tipp” (personal recommendation by an employee). Online for 3 weeks. Estimated impressions: 25,000.
 - **B2C Digital Promo** – December 2019
Supporting the launch of the new landing page, USA Reisen will run a Google AdWords campaign and launch three Facebook posts (currently more than 14,100 fans; almost as many subscribers).
- All required assets were delivered

Travel Trade/Consumer Publications & Portals:

- Das Erbe unserer Welt (Germany) – circ. 118,114 *Consumer*
 - **2/1 page, 4c Advertorial** – Winter 2019 Issue
Published twice a year since 2010 (Spring/May & Winter/November), ‘Das Erbe unserer Welt’ (‘Heritage of our World’) is polybagged with the German edition of National Geographic magazine and deployed to all subscribers, i.e. an educated and affluent readership in Germany. For the 2019 Winter edition, VSPC will be included in a special 7-page feature entitled “Florida Jewels” together with Palm Beach and Amelia Island. Layout received, corrected and approved. Pub was launched in-market on 11/01/2019.

Our efforts continued this month in negotiating and fine-tuning marketing initiatives with our vendors of choice. With the onset of the new FY last month, we received approval from HQ to move forward with submission of several media authorizations to Brand USA.

Of note: With St. Pete/Clearwater being a long-haul travel destination for the Central European markets, it is to be kept in mind that the positive effect of launched campaigns continues beyond the actual placement timeframes due to the lead time between inspiration, consideration and effective booking by consumers.

Given we are strongly focused on optimizing our area’s placement in the marketplace, considerable time and effort is spent on intensive negotiation with our vendors with a view toward ensuring best positioning for St. Pete/Clearwater in the marketplace. This effort is piloted in addition to our regular scope of work.

Public Relations:

Kaus Media Services - VSPC’s German PR Agency

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

- **Press Release November:** Proofread and corrected.
- **Newsletter November:** Proofread and corrected.

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