

CENTRAL EUROPEAN OFFICE

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MARKET INTELLIGENCE / TRENDS

German Travel Industry Attacks New Quarantine Rules

01 OCT: The German travel industry is launching a campaign against government plans for a minimum 5-day quarantine for people returning from COVID-19 'risk areas' after October 15. The move comes as Berlin introduces a new three-tier system of travel advice for all countries worldwide effective today.

The German government is planning to change immigration regulations so that, from October 15 onwards, all travelers returning from a corona 'risk area' (as defined by the German foreign ministry) would have to go into a 14-day quarantine. The quarantine duration could be reduced, if travelers take a corona test on or after the 5th day upon returning to Germany that then has a negative result. Under the present rules, valid since 08 August, returnees from risk areas have to undertake a free obligatory corona test within 48 hours either before or after their return. Quarantine is mandatory whilst awaiting the test result, which normally takes 24-72 hours.

DRV wants tests, not quarantine

But under the slogan 'corona tests instead of home arrest', the German Travel Industry Association (DRV) is lobbying against this plan. Instead, it wants expansion of COVID-19 tests at airports or other locations where travelers re-enter Germany. "We don't need any obligatory quarantine," declared DRV president Norbert Fiebig. "What we need is an expansion of the corona tests." A quarantine period of at least five days "is the wrong path and will lead the travel industry directly into a second lockdown", he warned. Fiebig emphasized once again that a package holiday "is the safe way to travel in corona times". For example, the infection rate among people returning from Spain was just 0.26%, he said. In contrast, the highest infection risks were from family or friends, at celebrations or parties, he pointed out.

Three-tier system for government travel advice

Meanwhile, the German foreign ministry is making a fundamental change in its international travel advice system. Since June, it has published regularly updated advice about travelling to most European countries either on a country or regional/local level. Yesterday (September 30), it ended a general travel warning for more than 160 countries outside the European Union. Instead, from today (October 1) onwards, there will be one single system of differentiated travel advice for all countries worldwide. This is a three-tier system comparable to a 'traffic light' system of 'green for go', 'orange for wait' and 'red for stop'.

'Red' warning for many big travel destinations

Berlin will continue to advise against non-essential private travel to all 'red' countries which it defines as 'risk areas' with a high risk of coronavirus infection (more than 50 new infections per 100,000 inhabitants during the previous 7 days). This currently affects 123 countries completely and 15 more partially (certain regions), according to the DPA news agency.

- Major travel destinations in this category currently include Spain, Belgium, Luxembourg, the Czech Republic, Iceland and Russia (all completely) along with Turkey (apart from the Riviera region), nearly all of France and most of Croatia.
- In addition, specific regions (or cities) on the list that are important travel destinations for Germans include: Austria (Tyrol, Vienna, Vorarlberg), Netherlands (Amsterdam, Rotterdam), Switzerland (Geneva), Hungary (Budapest), Ireland (Dublin), Portugal (Lisbon) and the UK (Wales & Northern Ireland).
- Outside Europe, important business and leisure travel destinations on the 'red' travel warning list include Brazil, China, Dominican Republic, Egypt, India, Indonesia, Morocco, Mexico, the **USA** and the UAE.

Berlin also advises against 'orange' destinations

In addition, the ministry will generally advise against travelling to countries in a second 'orange' category. These are countries with low corona infection rates, but where entry is partly limited, where a quarantine period is required after arrival or where freedom of movement is not permitted. This category contains a large number of other countries around the world.

Few holiday destinations on 'green' list

For 'green' countries with low levels of Covid-19 infection and no travel restrictions, the German foreign ministry will only advise travelers to take special care.

- At present, however, only nine out of the 26 EU member states fall into this category, including holiday destinations such as Italy, Greece, Cyprus and Malta.
- Outside Europe, only Tunisia and Georgia are on this list.
In future, German travel advice for countries in all three categories could change on short notice depending in particular on weekly infection levels.

DRV warns about "big uncertainty"

In response, the DRV today reiterated its call for the government to make its travel advice as local as possible to avoid penalizing entire countries or regions. "Of course, health is a top priority," said association president Norbert Fiebig. But, for example, "to warn against traveling to all of the Canary Islands when only one of the seven islands exceeds the critical limit is in no way appropriate. On the contrary, it is absurd. A differentiated approach is essential," he demanded.

Fiebig also warned that the new system would lead to confusion. "It is basically good that we are returning to a differentiated point of view. What remains is a great deal of uncertainty among everyone involved about what is okay and what is not. This is a threat to the very existence of our sector.

FTI Presents Slimmed-Down Winter Program

15 OCT: German tour operator FTI is focusing on medium-haul destinations in a slimmed-down winter programme offering discounted prices and special cancellation conditions. The

Canary Islands, Egypt, Morocco, the UAE and Oman are the main destinations on offer from Germany's third-largest tour operator in winter 2020/21 as it hopes for an upturn in bookings once the current wave of COVID-19 infections is over and travel warnings can be eased again. In particular, FTI is offering extensive early booking discounts and generous cancellation conditions to motivate Germans to book in the coming weeks. Managing director Ralph Schiller admitted: "We can only cautiously comment on what might be possible in which circumstances in the winter season, which lasts until April 2021. But for many people the prospect of a holiday is emotionally important and Germans' desire to travel is unbroken."

Weekly charters to the Canaries

In terms of the Canary Islands, FTI is currently planning weekly charter flights to Gran Canaria, Tenerife, Fuerteventura and Lanzarote from Düsseldorf, Munich, Frankfurt and Leipzig. "There is currently still a travel warning for the Canary Islands, but we are hoping that the corona numbers can be brought under control again by the winter," Schiller said. There is a comeback for Salalah in Oman with non-stop eight-hour flights from Düsseldorf, Munich, Frankfurt and Leipzig. Airline partner for the Canary Islands and Oman is Bulgarian charter airline Holiday Europe.

For Egypt, FTI will offer flights on Condor and Holiday Europe from Düsseldorf, Munich, Frankfurt and Leipzig to Hurgada, Marsa Alam and Sharm el-Sheikh this winter. Other important winter destinations include Agadir, Dubai and Turkey.

Summer holidays in December

Meanwhile, the Munich-based company has extended the 'summer' season until mid-December for several Mediterranean islands, including Crete, Rhodes, Sicily, Malta and Madeira. The tour operator has negotiated longer hotel opening periods with diverse hoteliers and is offering special packages for the extended season. FTI has also secured capacity on Condor's new flights to Cuba which took off on 06 October for the winter season.

Germany Lifts Travel Warning for Canary Islands

22 OCT: The Robert Koch Institute (RKI) – analogous to the U.S.'s CDC – has removed the Canary Islands from its list of coronavirus risk areas in Europe. Consequently, the German government has lifted the travel warning for the popular Spanish destination.

New entries in the risk area list

But the new list, which went into effect on Saturday 24 October at midnight, includes a lot of new entries: Whereas so far only certain regions of those countries were listed, now the whole of Poland, Switzerland, Ireland, Liechtenstein, UK and Northern Ireland are denounced as coronavirus risk zones. In Austria, eight out of nine federal states are now on the list with Carinthia being the only exception left.

Moreover, several Italian regions – including Tuscany, Lombardy, Sardinia and South Tyrol – have been added to the risk area list. The same applies to individual regions in Bulgaria, Croatia, Estonia, Hungary, Slovenia and Sweden.

No travel ban, but deterrent effect

The classification as a risk area and the travel warnings are not an official travel ban, but travelers returning to Germany from risk areas must be tested and go into quarantine until the test results are available. As of 08 November, there is a mandatory quarantine for 14 days which can be ended ahead of time if a traveler presents a negative test result after at least five days of quarantine.

German Tour Operators Relaunch Canaries Holidays

27 OCT: Tour operators in Germany are selling holidays on the Canary Islands again after Berlin lifted its travel warning for the Spanish islands, boosting hopes for an urgently needed comeback this winter. The German foreign ministry's advice for Spain now reads: "Due to high infection numbers there is a warning against unnecessary, tourist trips to Spain, with the exception of the Canary Islands." The decision means that German holidaymakers visiting the Canaries are no longer required to take coronavirus tests. In addition, they are excluded from the new obligatory quarantine rule that applies for trips to risk areas from 08 November onwards.

“Good news for winter sun holidays”

The German travel industry was quick to welcome the government's decision, which it had lobbied strongly for. Nobert Fiebig, president of the German Travel Industry Association (DRV), described it as "really good news for the travel industry and for everyone who likes travelling to a sunny destination in the winter". Leading German tour operators immediately reacted by relaunching holiday offers for Tenerife, Gran Canaria, Lanzarote, Fuerteventura, La Palma and La Gomera, promoting them through new sales offers and marketing activities. Most of their customers will fly to the Spanish islands with Condor or Eurowings.

Free cancellations and financial cover

DER Touristik said its brands Dertour, ITS, Jahn Reisen and Travelix are now offering holidays on the Canaries again, with "numerous hotels in different categories". The group even highlighted a long stay 'home office option, with a 25% discount for stays of four weeks or more in a villa in the Playitas Resort on Fuerteventura, including fully equipped video conference rooms. The group said all customers making new bookings with departures up to 31 December would benefit from special support and financial coverage up to € 3,500 for costs in case of a Covid-19 infection. Moreover, customers booking Canary Islands holidays by 31 October for departures up to October 30, 2021 could switch their booking to an alternative destination or cancel free of charge up to 14 days before departure.

FTI plans own flight program

For its part, FTI said customers have a choice of 480 hotels on the four main islands, including its own-brand Labranda, Lemon & Soul and Design Plus properties. The tour operator will add air capacity on short notice in November and then launch its own direct flight program in December in cooperation with airline partner Holiday Europe. "There will be weekly flights from four German airports to Gran Canaria, Fuerteventura, Tenerife and Lanzarote," said Manuel Morales, Group Head of Destination Spain.

TUI plans 50 flights

Meanwhile, market leader TUI said the government's move confirmed its own decision to resume offering holidays on the Canary Islands before the travel warning was lifted. "We have already gained a positive response over the last few days as we gave our customers the option of travelling to the Canaries despite the travel warning," explained Germany chief Marek Andryszak. "Several thousand guests took advantage of this offer resulting in a large number of new bookings." TUI plans to operate nearly 50 flights between Germany and the Canary Islands (Gran Canaria, Fuerteventura, Lanzarote and Tenerife) in the next 10 days. Customers benefit from TUI's inclusive Covid-Protect insurance through April 30, 2021. "We remain in close contact with hoteliers and authorities on the

Canary Islands to ensure that our customers can spend a safe and relaxing holiday on Gran Canaria, Fuerteventura, Lanzarote and Tenerife," Andryszak concluded.

The above action goes to show how quickly leading German tour operators react once travel warnings and/or bans are lifted.

ITB Berlin 2021 – Now Digital

28 OCT: The world's largest travel fair will take place as a 'virtual event' next March due to the ongoing corona pandemic, Messe Berlin announced, thus ending remaining hopes for some type of hybrid trade show. "ITB Berlin NOW!" will take place over four days from March 9-12, 2021 as a virtual edition and as B2B events for the worldwide travel industry, the trade fair company said.

"Planning certainty for exhibitors and visitors"

David Ruetz, head of ITB Berlin, explained: "The pandemic situation remains difficult, especially for the travel industry. With the decision to have a purely digital ITB Berlin 2021, we are now giving exhibitors and trade visitors the greatest possible planning certainty." In a customer message posted online, the show organizer wrote: "Under consideration of all circumstances, Messe Berlin has decided that ITB Berlin and ITB Berlin Convention will take place from 9 to 12 March 2021 in digital form as a purely B2B trade fair & conference. Detailed information on exhibitor packages, trade visitor tickets and sponsorship opportunities with worldwide reach will be available on a special website from 16 November."

Content, business and networking

Messe Berlin said its digital concept for ITB Berlin 2021 includes many high-quality panel discussions and presentations that will be video streamed along with digital networking opportunities and a virtual exhibition. David Ruetz, head of ITB Berlin, said: "We have developed an alternative concept with which we, as the world's leading travel trade fair, can once again offer our partners and customers a reliable platform for global networking, business and content. The content of the event will be highly relevant, as the industry is dependent on business discussions, professional exchanges of views and orientation, especially in these challenging times."

Travel trade events go online

Messe Berlin also underlined its experience in organizing virtual events this year after physical shows had to be cancelled due to the coronavirus pandemic. These include the 'itb.com' platform that was launched on short notice in March after ITB Berlin 2020 was cancelled and more recently ITB Asia in Singapore. Many travel trade events have been forced to switch to 'digital editions' over the last few months. World Travel Market (WTM) in London, for example, will also take place as a virtual marketplace in November.

Additional Insights ...

GERMANY

Quarantine/Lockdown "Light"

German Chancellor Angela Merkel has agreed with all premiers of the federal states on measures that will also have a strong impact on the travel industry. As of 02 November, hotels and vacation homes may not host tourists. Restaurants and bars will close, large events are

cancelled, unnecessary travel is strongly discouraged, all those that can work from home should, meetings in public spaces are restricted to two households and no more than 10 people, entertainment facilities are closed, public recreation centers (such as swimming pools, gyms, etc.) are closed, cosmetic and nail salons are closed as are brothels and no crowds at sporting events. Schools/kindergartens will remain open, church services and protests will be allowed to continue due to constitutional concerns, nursing home residents will be allowed to receive visitors, shows will remain open w/ one customer allowed per 10 square meters and borders will remain open. These restrictions will be in place until 30 November.

Borders

The list of newly designated risk areas published by the Robert Koch Institute is valid as of 24 October. The following countries are classified as risk areas: Great Britain with the exception of the Channel Islands, Ireland, Liechtenstein, Poland and Switzerland. In addition, individual regions in popular vacation destinations were added. For example, in Austria and Italy as well as in Bulgaria, Estonia, Croatia, Sweden, Slovenia and Hungary.

For travelers from risk areas, there is a general obligation to a 14-day quarantine. Up to and including 07 November, the health department will grant a reduction in quarantine time, if a negative CV-19 PCR test conducted either upon entry or one which was carried out not more than 48 hours before entry is submitted. The quarantine obligation will continue to apply from 08 November, but will be reduced from 14 to 10 days. However, those returning from risk areas may have themselves tested for Corona after the 5th day of quarantine. Submitting a negative result to the responsible health department leads to the early termination of the quarantine. Online registration with the health department for returnees from risk areas is mandatory in any case. A new program will go online for this purpose.

Airlines

Lufthansa CEO Carsten Spohr has announced that operations in for the winter season will be reduced more significantly than previously planned. Last week Lufthansa had already announced that the company will offer a maximum of 25% of last year's capacity instead of the 50% originally planned. This is because with rising COVID-19 infections in Europe and America, leading to travel restrictions and quarantine obligations, demand is collapsing again. Lufthansa and its sister companies Eurowings, Swiss, Austrian and Brussels Airlines will therefore be decommissioning 125 aircraft that were scheduled to take off in winter. Management estimates that the number of passengers will remain more than 80% below the previous year's figure.

Sentiment

Despite the COVID-19 pandemic, customers' desire to travel remains unbroken. When it comes to the three most important prerequisites for travel (enough money, time and desire) the customers' answers are very similar compared to November 2019. There is a slight tendency to travel to familiar regions with an own vehicle and a somewhat greater interest in recreation, nature, and city trips. The respondents rank the hygiene standards in the destinations and especially in the hotels among top priorities. The desire to travel goes hand in hand with higher demands on the travel industry. Customers expect a money-back guarantee, generous cancellation policies and extended goodwill arrangements in general, as well as flexibility and transparency from the tour operators.

Airports

14 years of construction, many planned and repeatedly postponed opening dates, drastically increased construction costs, **Berlin Brandenburg Willy Brandt Airport (BER)** was officially opened on 31 October. Construction of BER (named after the former West German

chancellor) started in 2006 and was initially slated to open in October 2011. Due to the less than glorious project development and the Corona crisis, there were no major celebrations for the official opening last weekend. Special flights by budget carrier Easyjet and Lufthansa were the first to land at the new airport on Saturday. On Sunday 01 November the first commercial departures started at 6 a.m. kicking off a week-long transition, with the last flight from Tegel due to depart on 08 November. In addition to Lufthansa and Easyjet, Qatar Airways and Turkish Airlines are currently already present at BER with Eurowings following as of 04 November. The opening of the new airport's Terminal 2 has been delayed until early next year because it isn't currently needed. The former East Berlin's Schoenefeld airport, which is located across the runways from BER, is being incorporated into the new airport as its Terminal 5. Tegel and Schoenefeld handled a total 35.6 million passengers last year, putting Berlin in third place in Germany behind the Frankfurt and Munich hubs.

Fraport CEO Stefan Schulte announced that **Frankfurt Airport's** Terminal 3 will not open until 2025 due to the dramatic slump in air traffic caused by the Coronavirus pandemic. Fraport had announced this summer that the construction of Terminal 3 would be continued, because it would be cheaper than stopping construction. However, the effects of the Corona crisis on air traffic have now lead to the postponement. Terminal 3 is slated for a handling capacity of 14 million passengers annually. When fully expanded, up to 25 million would be possible. The construction of Pier G planned for low-cost airlines will also be postponed to 2025. Pier G was originally scheduled to go into service the summer of 2022 and was to be utilized mainly by low-cost carrier Ryanair. Pier G is planned to have a handling capacity of 5 million passengers annually. In the event of a recovery in air traffic, the gate could be activated quickly. Currently, Terminal 2, which houses several international carriers, is closed. Only Terminal 1 remains open for all air traffic in and out of FRA.

AUSTRIA

In Austria, a partial lockdown applies as of 02 November, similar to Germany. The gastronomy and almost all cultural and leisure activities are closed as of today. Between 8 p.m. and 6 a.m., people are only allowed to leave their homes with good reason. This also includes a walk. In principle, due to the Corona pandemic, a travel warning currently applies to almost all of Austria. With the exception of two small exclaves, the country was declared a corona risk area by the federal government on Friday 29 October.

BELGUIM

Belgium has imposed a partial lockdown. Non-essential shops have been closed and trades requiring close contact, like hairdressers, are closed. Gyms, pools and other cultural and leisure facilities are also closed. Working from home is mandatory where feasible. Belgians are allowed to welcome only one close contact into their homes. Those who live alone will be allowed two of these so-called "cuddle contacts". Beyond their home, gatherings will be limited to a maximum of four people. The European Center for Disease Prevention and Control has ranked Belgium as the worst affected nation in the 27-nation European bloc, with 1,600 cases per 100,000 inhabitants.

FRANCE

French President Emmanuel Macron has announced a second national lockdown until at least the end of November. Macron said that under the new measures, starting on Friday 30 October, people would only be allowed to leave home for essential work or medical reasons. Non-essential businesses, such as restaurants and bars, will close, but schools and factories will remain open. COVID-19 daily deaths in France are at the highest level since April.

GREECE

Starting 03 November Greece will shut down restaurants, bars, cafes, cinemas and gyms across a large part of the country, including the capital Athens, after a surge in coronavirus cases. Outlining the measures in a televised address, Prime Minister Kyriakos Mitsotakis said the new set of restrictions will be in place through 30 November. Restaurants in the affected areas will still be allowed to offer takeaways and deliveries. Masks will become mandatory across all of Greece and a curfew will come into force from midnight to 5am. University classes across the country will have to be conducted online. But in contrast to the spring lockdown, travel within the country will not be affected and retail shops will stay open.

ITALY

New restrictions were introduced on 26 October and will remain in place for a month. All bars and restaurants must close by 6pm, but can provide takeaways after this time. Schools and work places remain open. Gyms, swimming pools, theaters and cinemas are closed but museums remain open. Gatherings for weddings, baptisms and funerals are banned. Face masks are already compulsory everywhere apart from at home.

NETHERLANDS

The government is expected to tighten measures again. Cinemas, theaters and museums should close. A partial lockdown was imposed almost three weeks ago. The number of new infections was more than 10,000 within 24 hours before the weekend, but now seems to be slowly falling. But the pressure on hospitals remains very high.

Aviation

The Dutch government will halt its multibillion Euro coronavirus bailout to national carrier **KLM** amid a standoff with a pilot's union about terms of the rescue package, the Dutch finance minister said Saturday 31 October. The dispute, if not resolved, could have dire consequences for KLM, which employs some 30,000 people. The company announced Friday 29 October that it recorded a loss of €234 (\$363) million in the third quarter as a result of the aviation slump caused by the Coronavirus pandemic. The government threw KLM a €3.4 (\$5.27) billion lifeline in June to help the airline survive the sharp downturn in air travel amid the pandemic. The package is made up of a 1 billion-Euro loan and 2.4 billion Euros in guarantees for bank loans. But there were strings attached, including a demand that KLM cut costs by 15%, and improve the airline's sustainability. KLM submitted a restructuring plan to the Dutch government on 01 October in which labor unions representing pilots, cabin crew and ground staff agreed to pay cuts. However, the agreements only applied until 2022. Finance Minister Wopke Hoekstra is seeking assurances from KLM that unions will agree to pay cuts throughout the duration of the bailout, likely five years.

SPAIN

Spain declared a state of emergency and began a nationwide curfew between 11pm and 6am on 25 October. Territorial restrictions are in place and meetings of more than six are banned across the country. People are only allowed to leave their homes if going to work, buying medicine or caring for someone. Face masks are already mandatory on public transport and indoor public spaces, with several regions making mask-wearing compulsory outdoors as well.

SALES ACTIVITIES

VISIT FLORIDA/Visit USA Germany Virtual Road Show (October 2020):

The Visit USA Committee Germany has developed a new travel advisor training concept focused on presenting a series of training sessions dedicated to one U.S. State or region at a time. The first execution of this new ‘virtual road show’ concept took place this month with VISIT FLORIDA making the debut. With spots limited to eight VF partners, we registered immediately thereby securing our VSPC participation! The road show comprised a series of four 60-minute virtual training seminars held each Thursday, whereby two VF partners were paired up to present during each session.

To break away from ‘traditional’ virtual formats, new twists were incorporated:

- For example, each session had a specific theme. St. Pete/Clearwater was the opening destination on **Oct. 8th** together with The Beaches of Ft. Myers and Sanibel presenting an “Insider Tips” theme.
- Creativity and interaction are key to our standing out and bringing our destination front & center in an extraordinary way. To this end, ‘personalized’ videos shot on location in the destination by Rosemarie Payne and her team featuring hot insider tips were included in our presentation. An official big Thank You to Rosemarie and team for the exemplary support in developing four fabulous video clips bringing our destination to life!
- Furthermore, we developed a thrillingly interactive ‘Treasure Hunt’ with ensuing live quiz to ensure attentiveness and ramp up the excitement during our innovative presentation.

220 trade contacts eager to educate themselves in preparation for meeting pent-up demand once borders between Europe and the U.S. open registered for this event. Our comprehensive PowerPoint presentation including Rosemarie’s video clips and our innovative treasure hunt garnered tremendous praise for its notable creativity and interactive highlights by the agents, VISIT FLORIDA and VUSA Germany!

Visit USA Netherlands Travel Advisor Training (October 13th, 2020):

After a successful series of webinars this summer, the Visit USA Netherlands has scheduled a fall series of virtual travel advisor training sessions. Held on Tuesdays, U.S. destination and attraction partners can present themselves for 30 minutes each. Invitations to 1,800 Dutch travel advisors are deployed prior to each session. Travel advisors may also register on the Committee’s dedicated B2B website, where the training series schedule is posted.

Our destination was portrayed in a story-telling format this time with integration of our USP’s and another thrillingly interactive ‘Treasure Hunt’ with ensuing live quiz serving to ensure attentiveness and excitement for our special slice of paradise during our innovative presentation. We were paired up with The Florida Keys & Key West training close to 50 travel advisors.

Our training session was recorded, thus open to Dutch travel advisors and trade media to access at their leisure on the Committee’s “Trade Webinar” page and on its YouTube platform. Further promotion thereof on the Committee’s social media channels, giving VSPC exposure for months to come.

Brand USA Global Marketplace / Travel Week Europe (October 26th - 29th, 2020):

Brand USA has introduced its new “Global Marketplace” – an always-on, interactive, one-stop-shop digital platform for B2B engagement between U.S. partners and the global travel industry. The convention-style platform includes a main stage, buyer pavilion, USA partner pavilions, networking lounge and on-demand ‘featured’ and ‘enrichment’ video content.

Several events are planned through mid-2021, the first of which is the virtual version of *Travel Week Europe* held this month.

Supplier company ‘pods’ (booths), organized by U.S. region, are populated with downloadable content, imagery, videos and on/offline communication options. VSPC registered for participation in the Global Marketplace last month, thereby reinforcing its global footprint and commitment to these important international markets.

FINAL RECAP ...

Brand USA Global Marketplace

- Launched October 26th, 2020 / Scheduled to remain live through June 30th, 2021
- Upcoming Events ...
 - Fall/Winter 2020*
 - Forum on Canada
 - UK & Ireland Travel Agent Event
 - Brand USA Media Mondays
 - Brand USA Tour Operator Tuesdays
 - Winter/Spring 2021*
 - Receptive Operator Marketplace
 - Forum on Mexico
 - European Media Fam
 - Focus on Europe
 - Australia & New Zealand Travel Week Down Under

Travel Week Europe (10/26-29/2020) – Global Marketplace’s debut event!

- 750 participants from across Europe and the USA
- 154 buyers from 18 countries
 - Central Europe:*
 - 13 from Germany, 1 from Austria, 2 from Switzerland, 4 from Belgium, 16 from The Netherlands, none from Luxembourg, 2 from Hungary, 3 from Poland, 3 from Czech Republic
- 130 U.S. supplier companies present in 7 regional pavilions
- Southeast Pavilion comprised 37 exhibiting partners, 12 of which were Florida suppliers
- Networking sessions by European region, with Germany, Austria, Switzerland among them
 - Platform for buyers and suppliers to connect for candid exchanges following the appointment sessions
- Travel Week Europe platform was easy to navigate, appointment timing excellent, smooth transitions between all Global Marketplace “halls”
- Participation reinforces our global footprint and commitment to these important international markets
- Platform allows us not only to maintain and further strengthen relationships built over several years, but also login to our own booth pod to check for customer messages or business cards dropped off on an ongoing basis
- Our personal service continues to be important and is greatly valued
- Opportunity to strategize and share ideas for when mobility restrictions between countries are relaxed / lifted

- Appointments:
 - Maximum of 24 pre-scheduled appointments
 - 6 one-on-one, face-to-face virtual appointments per day (our appointment schedule was completely filled!)
 - PowerPoint presentation developed specifically for this show containing new destination highlights, useful links, services we offer to tell the St. Pete/Clearwater story (including virtual FAM's, digital assets such as imagery, videos, social media posts, trainings/webinars, etc.)
- Re-entry & recovery
 - Marketing initiatives – Tabled for now, but review for potential in the coming months
 - Marketing initiatives – Pooling resources advantageous, look for Visit Florida / Brand USA co-ops
 - Destination updates are valued, particularly as related to latest news and safety measures being implemented as they pertain to Covid-19

Client Feedback ...

Central Europe

- Eagerly awaiting end of travel ban from Europe to the U.S. and with it, additional air service to resume
- High level of pent-up demand in general
- 50%-60% of 2020 travel plans rebooked to 2021 during early stages of pandemic; pace now slowing
- 2021 travel programs (static/catalog and digital) are in-market and bookable
- Operator's cancellation policies have been relaxed considerably
- Very few bookings/departures through Q1 2021; however, booking movements observed for Q2 & Q3 2021
- The earlier 2022 rates can be provided, the better
- Increased interest in higher-end products, unique destination experiences, activities in wide-open spaces, off the beaten path, no crowds
- FL remains among top-rated U.S. destinations
- Operator websites becoming increasingly important as consumers' go-to for information
- Current marketing initiatives underway by operators:
 - “Dream now, travel later” - inspirational messaging as well as ‘hot offers’ for 2021 via digital channels (operator websites, social media, eNews blasts, podcasts, etc.)
- Travel advisor virtual trainings of great value as operators gear up for future sales
- Safety first when choosing a destination - details on measures that increase the feeling of safety are key to winning over potential customers

USA/Canada Experience, Netherlands (October 30th, 2020):

Original plan: 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 will see us holding comprehensive training sessions for over 120 agents from all over The Netherlands. The event will culminate in an exciting contest and travel prize raffle.

Updated plan: Due to the continued dramatic spread of CV-19 resulting in mobility and physical gathering restrictions, an in-person event will not be held as planned. In lieu thereof, the organizers have developed a *live community interactive concept* during which we had the

opportunity to conduct comprehensive (virtual) product presentations followed by an interactive chat session with participating travel advisors. Program details:

- Full-day virtual event
- Four presentation blocks of 60 minutes each, three supplier presentations per block
- Integration of intermittent polls and quiz questions to ensure maximum participation
- Prize raffle at conclusion of event (we will sponsor VSPC beach towels)

The training sessions were recorded and made available on VUSA Netherlands' website for travel advisors to review at their leisure.

The Travel Club & Your Travel Workshop, Netherlands (November 5th-6th, 2020):

Original plan: After our very successful participation in the above workshop last year, which was staged in conjunction with Delta Air Lines' inaugural flight from AMS->TPA, we plan to participate again this year in further pursuit of our sales efforts in the Dutch market.

The Travel Club is the largest and fastest growing independent franchise organization for independent travel consultants and business advisors in the Netherlands and Belgium. More than 360 travel agents are members producing an annual turnover of > € 122 million (2019).

Twice a year, The Travel Club organizes the well-known "Workshop Days" during which suppliers have the opportunity to present products and educate agents - 18 sessions of 20 minutes each.

Updated plan: Due to the continued dramatic spread of CV-19 resulting in mobility and physical gathering restrictions, the organizers have advised that this program cannot be conducted in person as planned (in May). Revised timing was set for November 5th-6th, 2020. We were informed this month that latter dates have been postponed until such time as the CV-19 situation allows for unrestricted mobility.

Tioga Tours In-House eTraining, Netherlands (November 10th, 2020):

We conducted a virtual in-house travel advisor training this month with one of the top Dutch tour operators for the U.S., i.e. Tioga Tours. Twelve in-house reservation agents participated in the one-hour presentation comprised of comprehensive destination information, hot news, insider tips and recommendations related to visiting our area safely and responsibly. We joined forces with two Florida destinations: The Florida Keys & Key West and Naples, Marco Island and the Everglades. This was particularly well-received by the agents, since the combination of our destinations is among the preferred routes traveled by Dutch consumers whilst in Florida.

Visit USA Belgium Travel Advisor Training (December 3rd, 2020):

Due to the impressive participation in B2B eTraining conducted to date, we continue to proactively source additional avenues for virtual travel advisor training with various industry partners. This month we secured an eTraining opportunity with the Visit USA Belgium to be held in cooperation with The Florida Keys & Key West and Greater Miami CVB in December. Starting next month, the Committee will promote our training session via several channels including their eNewsletter and social media network.

Del-Tour Travel Advisor Training, Belgium (January 14th, 2021):

This month we secured yet another an eTraining opportunity with our tour operator partner Del-Tour in Belgium. Del-Tour's dedicated agencies will be invited to attend an intensive one-hour 'Florida' session to kick off the new year. In partnership with The Florida Keys &

Key West, we will portray new developments in our destinations and integrate information on recommendations related to visiting our area safely and responsibly during the pandemic.

Additional Activity:

- Continued to participate in innumerable conference calls, tourism organization webinars, virtual sales calls, ongoing communiqués with our partners regarding situation status.
- Continued deployment of updates to travel trade partners promoting VSPC developments, website resources and VSPC campaigns while offering our ongoing assistance and support.
- Generated updates to HQ on developments around the CV-19 pandemic in Europe, etc.
- **Website Requests for Destination Magazines:**
0 requests received via the crm@simpleviewinc.com platform this month.

MARKETING INITIATIVES

FY 19/20 has been wrapped up, all vendor invoices have been received and transmitted accordingly. With the onset of our new FY 20/21, we are proactively engaging with clients regarding development of potential initiatives in preparation for re-entry and recovery. In ongoing communiqués with industry organizations such as Visit Florida and Brand USA to explore future co-ops. Meanwhile awaiting direction from HQ related to available budget.

Public Relations Support:

Kaus Media Services - VSPC's German PR Agency

This month saw us assisting the agency with the following:

- **Press Release October:** Proofread and corrected.

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