MARKET UPDATE FOR GERMANY

- TOTAL GERMAN VISITATION: 19,100
- TOTAL SPENDING: $19.62 Million
DESTINATION TRAININGS IN FY 2022

- **FVW Virtual Counter Days** – August 31 to September 2, 2022
  - Virtual travel agent show organized by the largest German trade media FVW/Travel Talk
  - TMR participated on behalf of AOT with virtual Arizona booth featuring Arizona information, images, a video and TMR contact information
  - 160 exhibitors and 2,300 tourism experts attended the show
  - Performance:
    - 142 chat conversations
    - 5 video calls
DESTINATION TRAININGS IN FY 2022

- **German Arizona online training program**
  - Promotion of the program during webinars, at the FVW Counter Days, and in German AOT trade newsletter
  - **74 travel agents** completed all modules by end of FY22.
  - The online training program will be continued for another year till June 2023. Contents will be updated asap.
## Webinars in FY 2022

<table>
<thead>
<tr>
<th>Timing</th>
<th>Topic</th>
<th>Partner</th>
<th>No. of Live Participants</th>
<th>Total No. of Registrants That Received Follow Up &amp; Recording</th>
</tr>
</thead>
<tbody>
<tr>
<td>August 2021</td>
<td>State Parks, National Parks &amp; Monuments in Northern Arizona</td>
<td>Petrified Forest National Park</td>
<td>24</td>
<td>43</td>
</tr>
<tr>
<td>August 2021</td>
<td>State Parks, National Parks &amp; Monuments in Western &amp; Southern Arizona</td>
<td>Cochise County Tourism and Economic Council</td>
<td>14</td>
<td>47</td>
</tr>
<tr>
<td>November 2021</td>
<td>Itinerary suggestion from Las Vegas to Phoenix</td>
<td>Travel Nevada</td>
<td>38</td>
<td>57</td>
</tr>
<tr>
<td>March 2022</td>
<td>Arizona-Colorado multistate webinar</td>
<td>Colorado Tourism Office</td>
<td>29</td>
<td>48</td>
</tr>
<tr>
<td>March 2022</td>
<td>Luxury Experiences in Arizona</td>
<td>Maverick Helicopters</td>
<td>24</td>
<td>31</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>5</strong></td>
<td></td>
<td><strong>129</strong></td>
<td><strong>226</strong></td>
</tr>
</tbody>
</table>
WEBINAR PROMOTION PACKAGE
JungeReiseprofis (JRP) / TRVL COUNTER

- Placement of Arizona webinars with registration link and webinar recordings on junge-reiseprofis.de including webinar microsite

- Promotion of webinar as „Save the Date“ and text ad in the JRP newsletter
  - Reach: 34,000 recipients

- 1-week promotion of webinar as text ad in the daily B2B TRVL COUNTER MORNING NEWS newsletter
  - Reach: 34,000 recipients
WEBINAR PROMOTION PACKAGE
JungeReiseprofis (JRP) / TRVL COUNTER

- 1-week website banner on junge-reiseprofis.de
- Social media posts on Facebook & Instagram
TOUR OPERATOR MARKETING

ARGUS Reisen – September/October 2021

● „A Journey Through the USA“ campaign
  ○ Consumer newsletter featuring a new Arizona itinerary
    ■ Reach: 30,000 subscribers
  ○ Arizona feature incl. destination video on interactive USA map → linked to the tour operator’s website with Arizona product
  ○ Facebook & Instagram posts
    ■ FB: 4,200 fans / IG: 567 followers
TOUR OPERATOR MARKETING

CANUSA Touristik – February 2022

● Brand USA consumer marketing coop promoting Arizona product

  → TMR reviewed and gave feedback to all contents of the marketing package

  ○ Promotion Package Content featuring 3 itineraries including overnights in Arizona

  ○ Social Media promotion: 2 Facebook & 2 Instagram posts

      ■ FB: 70,000 fans / IG: >8,200 followers
TOUR OPERATOR MARKETING

CANUSA Touristik – cont’d

- Online Promotion: image-text ads in content discovery networks
  - Reach: 6 million ad impressions

- Mini newsletter including Arizona editorial and a travel package
  - Reach: 40,000 readers targeted for the destination
TOUR OPERATOR MARKETING

CRD Touristik – March/April 2022

- Update of Taste of Arizona subpage

- Joint CRD-AOT coops with America Journal
  - Print advertisement in „America Journal“ – 37,000 copies with 130,000 readers per issue
  - Corresponding ad in the America Journal consumer newsletter
  - America Journal Facebook post
    - FB: 1,300 fans
TOUR OPERATOR MARKETING

CRD Touristik – cont’d

- Online advertorial on „ZEIT ONLINE“
- Newsletter integration „ZEIT Reisen“
- CRD consumer newsletter featuring their „Amazing Arizona“ itinerary
  - 70,302 recipients / Opening rate: 19.52%
  - Amazing Arizona: Clicks: 498 / CTR: 3.6%
- Social Media Posts (3 FB + 3 IG Posts)
  - Total reach: 1,059 / total interactions: 28
TOUR OPERATOR COOPERATION

FTI Austria Summer Festival – June 2022

- Participation on behalf of AOT in two networking events in Austria to introduce Arizona and network with Austrian travel agents
  - TMR showed an image slide show while talking to each of the participants and answering their questions
  - Participants in Graz: 48
  - Participants in Vienna: 68
AIRLINE COOPERATION

Condor – April to October 2022

- B2C newsletters articles linked to the destination page on condor.com
  - Reach: 200,000 / Opening rate: approx. 20%

- B2B newsletter article for Condor partner agencies
  - Reach: 6,500 / Opening rate: approx. 40%

- Extranet article (accessible for all Condor partners)
  - Reach: 8,000 partner agencies
AIRLINE COOPERATION

Condor – cont’d

● 3 organic Facebook and Instagram posts
  ○ FB: 493,000 followers / IG: 134,000 followers

● Arizona in-flight video shown on Condor longhaul connections (Run time: August to October 2022)
PARTNER COOPERATION

360° USA Magazine (December 2021)

- Printed consumer magazine featuring a 32-pages Arizona special and Arizona cover
  - **Circulation**: 5,000
- Contents have been coordinated by TMR:
  - Grand Canyon: Walking from the North Rim to the South Rim in four days (6 pages)
  - Havasu Falls: Trekking to the most beautiful waterfall in the Grand Canyon (8 pages)
  - Mogollon Rim: Original Arizona away from the Grand Canyon (6 pages)
  - Sedona: The pearl of Arizona (4 pages)
  - Camping in Arizona (2 pages)
ADDED VALUE – NO MARKETING FUNDS USED

- CANUSA Touristik – Consumer newsletter with AZ header image to announce border opening and linked to USA product on the CANUSA website (September 2021)

- Condor – Consumer newsletter promoting their US destinations using a Grand Canyon image (October 2021)

- ARGUS Reisen – Consumer newsletter featuring the travel ban lifting and their rental car offers using a Grand Canyon image (November 2021)
ADDED VALUE – NO MARKETING FUNDS USED

- Go2travel – Website launch: Horseshoe Bend image on the starting page representing their USA offers

- FVW/TravelTalk – Online advertorial promoting the OTP, AOT Germany YouTube channel and German trade newsletter (November 2021)

- CANUSA Touristik – Consumer newsletter promoting Scottsdale, Sedona, and their Arizona offers (November 2021)
ADDED VALUE – NO MARKETING FUNDS USED

- CANUSA Touristik – Consumer newsletter promoting motorhome offers using a Lost Dutchman State Park image (December 2021)

- USA-Reisen.de – Consumer newsletter featuring their new city guides of Scottsdale and Sedona (January 2022)

- Condor – Consumer newsletter promoting special offers for their North America destinations including Phoenix (January 2022)
ADDED VALUE – NO MARKETING FUNDS USED

- ARGUS Reisen – Consumer newsletter promoting White Stallion Ranch in Arizona (January 2022)

- ARGUS Reisen – Consumer newsletter featuring a Grand Canyon image provided by TMR, promoting their Southwest USA offers (February 2022)

- Condor – Consumer newsletter promoting special offers for their North America destinations including Phoenix (February 2022)
ADDED VALUE – NO MARKETING FUNDS USED

● ARGUS Reisen – Consumer newsletter promoting different US itineraries including Arizona offers (February 2022)

● ARGUS Reisen – Consumer newsletter promoting USA ranch offers including Rancho de la Osa (March 2022)

● ARGUS Reisen – Consumer newsletter promoting their Southwest USA offers featuring a Sedona image provided by TMR (March 2022)
ADDED VALUE – NO MARKETING FUNDS USED

- ARGUS Reisen – Consumer newsletter promoting a 12-nights Arizona itinerary including White Stallion Ranch (April 2022)

- Explorer World of Travel – Consumer newsletter promoting a 16-days "Wild West" itinerary including overnight in Flagstaff (May 2022)
BI-MONTHLY TRADE NEWSLETTERS

- Recipients: Trade partners from the German-speaking markets

<table>
<thead>
<tr>
<th>Month</th>
<th>Topic</th>
<th>No. of Recipients</th>
<th>Opening Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>August 2021</td>
<td>Arizona's craft beer scene</td>
<td>271</td>
<td>42.8%</td>
</tr>
<tr>
<td>October 2021</td>
<td>Arizona’s ghost towns</td>
<td>273</td>
<td>45.4%</td>
</tr>
<tr>
<td>December 2021</td>
<td>Holiday greetings and Christmas activities in Arizona</td>
<td>272</td>
<td>42.3%</td>
</tr>
<tr>
<td>February 2022</td>
<td>Arizona's wineries off-the-beaten-path</td>
<td>267</td>
<td>38.2%</td>
</tr>
<tr>
<td>April 2022</td>
<td>Arizona’s National Parks</td>
<td>267</td>
<td>41.9%</td>
</tr>
<tr>
<td>June 2022</td>
<td>Arizona’s unique hikes</td>
<td>267</td>
<td>41.2%</td>
</tr>
</tbody>
</table>
BI-MONTHLY TRADE NEWSLETTERS – SAMPLES
VISIT USA GERMANY ACTIVITIES

- Trade newsletters (approx. 22,400 recipients)

<table>
<thead>
<tr>
<th>TIMING</th>
<th>TOPIC</th>
</tr>
</thead>
<tbody>
<tr>
<td>August 2021</td>
<td>Arizona’s Must Sees</td>
</tr>
<tr>
<td>September 2021</td>
<td>Appreciate AZ</td>
</tr>
<tr>
<td>October 2021</td>
<td>Promotion of the German OTP &amp; YouTube channel</td>
</tr>
<tr>
<td>November 2021</td>
<td>Native Heritage Month</td>
</tr>
<tr>
<td>February 2022</td>
<td>New video series: Ranger Talks</td>
</tr>
<tr>
<td></td>
<td>Promotion of Arizona Luxury webinar with registration link</td>
</tr>
<tr>
<td>March 2022</td>
<td>Promotion of Arizona Luxury webinar with registration link</td>
</tr>
<tr>
<td></td>
<td>Promotion of Arizona &amp; Colorado multistate webinar with registration</td>
</tr>
<tr>
<td></td>
<td>link</td>
</tr>
<tr>
<td>April 2022</td>
<td>Promotion of German Arizona trade newsletter with link for enrollment</td>
</tr>
<tr>
<td>May 2022</td>
<td>City trip suggestions</td>
</tr>
<tr>
<td>June 2022</td>
<td>Top 5 activities in Arizona</td>
</tr>
</tbody>
</table>
VISIT USA GERMANY ACTIVITIES

- Website posts on the new German VUSA page
  - In March 2022, the VUSA Germany website has been relaunched. Members are able to post own contents for German-speaking trade, media and consumers now.

<table>
<thead>
<tr>
<th>TIMING</th>
<th>POST TOPICS</th>
<th>NO. OF POSTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>February &amp; March</td>
<td>• Arizona Visitors Guide</td>
<td>8 *</td>
</tr>
<tr>
<td>2022</td>
<td>• Arizona sales resources</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Tucson &amp; Saguaro National Park</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Arizona's National Parks</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Greater Phoenix</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Arizona &amp; Colorado webinar (registration link &amp; recording)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Sedona &amp; Oak Creek Canyon</td>
<td></td>
</tr>
</tbody>
</table>

* In order to build a broad and diverse information base right from the beginning, TMR added a lot of content on behalf of AOT before the actual website relaunch.
VISIT USA GERMANY ACTIVITIES

- Website posts – cont'd

<table>
<thead>
<tr>
<th>TIMING</th>
<th>TOPICS</th>
<th>NO. OF POSTS</th>
</tr>
</thead>
</table>
| April 2022 | • German Arizona trade newsletter  
               • Arizona's wineries  
               • Arizona Parks Passport  
               • Arizona canyons itinerary | 4            |
| May 2022   | • Condor nonstop flight to PHX  
               • Arizona's best beaches | 2            |
| June 2022  | • Unique hikes in Arizona  
               • New digital luxury brochure | 2            |
|            | TOTAL NO. OF POSTS SINCE WEBSITE LAUNCH                               | 16           |
TRADE FAM TRIP

- May 21st – 26th, 2022
- Nonstop Condor flight to PHX
- Participants: 4 German tour operators
- Cities visited: Phoenix, Flagstaff, Sedona, Scottsdale, Tucson
- None of the participants had ever been to Arizona before the fam trip and TMR received great feedback. Some of the participants published a post on their website about the trip.
ADDITIONAL TMR SERVICES THROUGHOUT FY22

- Continuous communication with trade partners from the German-speaking markets
- Constant market analysis and sharing of relevant industry news with AOT
- Promotion of German Arizona online training program and German AOT YouTube channel trade webinars and newsletters
- Providing German Arizona trade resources to partners (sales sheet, itineraries, newsletters)
- Fulfillment of German brochure requests
- TMR joined 9 IPW Appointments with tour operators from the German-speaking market
## KPI Summary Trade FY 2022

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Calls</td>
<td>16</td>
<td>18</td>
<td>25</td>
<td>27</td>
<td>24</td>
<td>22</td>
<td>19</td>
<td>20</td>
<td>23</td>
<td>14</td>
<td>10</td>
<td>18</td>
</tr>
<tr>
<td>Training Seminars</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>Total # of people</td>
<td>0</td>
<td>38</td>
<td>0</td>
<td>16</td>
<td>42</td>
<td>3</td>
<td>1</td>
<td>1</td>
<td>54</td>
<td>0</td>
<td>0</td>
<td>116</td>
</tr>
<tr>
<td>present at training</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>seminars*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tradeshow</td>
<td>0</td>
<td>11</td>
<td>25</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>16</td>
</tr>
<tr>
<td>Appointments**</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fam Trips</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td># of FAM attendees</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>4</td>
</tr>
<tr>
<td>TOTAL REACH</td>
<td>16</td>
<td>67</td>
<td>50</td>
<td>43</td>
<td>66</td>
<td>25</td>
<td>20</td>
<td>23</td>
<td>77</td>
<td>14</td>
<td>14</td>
<td>150</td>
</tr>
</tbody>
</table>

* Including Online Training Program
** Including virtual FVW Counter Days & IPW
MARKET OUTLOOK FOR GERMANY

- Trade partners from the German-speaking market are very positive that the 2022/23 season will overall be very successful.
- They still receive bookings for summer/fall 2022 and many requests for 2023.
- 2019 numbers are reached or exceeded already.
- Challenges at the moment and for next year:
  - Rental car and flight availabilities and pricing.
  - Although consumers are not as price-sensitive as pre-COVID as they have saved travel budget over the pandemic, tour operators think that 2023 will be more crucial than 2022 because of the inflation, higher utility costs and living expenses.
- Recommended course of action:
  - Due to the expected developments, it will be more important to focus on our main target groups and reach the right audience with a tailormade (trade & consumer) marketing approach.
THANK YOU!

Simone Saxer, Account Manager
Arizona Office of Tourism
c/o TravelMarketing Romberg
s.saxer@travelmarketing.de