

EXECUTIVE SUMMARY

Review and recommend approval of the proposed Tourism Strategic Plan for Fiscal Year 09

OBJECTIVE: Review and recommend approval by the County Commission of the FY 09 Strategic Plan as developed by the Tourism Department staff.

CONSIDERATIONS: Staff has held a series of meetings with the Collier County tourism industry hotels, attractions, shopping and dining venues, our tourism marketing services partners including Paradise Advertising, Miles Media Group, Visit Florida, BCF Public Relations, Klages Research and Phase V. Those meetings have produced a comprehensive and totally integrated Strategic Plan for FY 09 (October '08 – Sept. 09).

Incorporated into the Strategic Plan is an Executive Summary that highlights the overall plan, plus a comprehensive, integrated Marketing and Media plan. If recommended for approval by the TDC, the complete plan will be presented to the County Commission at their October 28 meeting for their final approval.

The Economic Emergency Marketing plan to stimulate more International visitation that was approved by the BCC on July 22, 2008 has been incorporated into the FY 09 plan. Our representatives in Europe and the UK have been brought to full time status and our part time Public Relations Assistant position has also been made full time. A recap of our complete tourism marketing budget is also included as part of this plan indicating a fully integrated approach to marketing our destination to the world.

COUNTY ATTORNEY: This item has been reviewed by the County Attorney's Office and is legally sufficient for Board action. – CMG.

FISCAL IMPACT: The expenditures from the various tourist tax funds as outlined in this plan are budgeted in the Tourism Department's FY 09 budget as approved by the County Commission on September 25, 2008.

GROWTH MANAGEMENT IMPACT: There is no impact to the Growth Management Plan related to this action.

RECOMMENDATION: Staff requests the TDC recommend approval of the proposed Strategic Plan incorporating the Marketing and Media plan for FY 09 and request the County Commission review and approve the plan at their October 28 meeting.

PREPARED BY: Jack Wert, Tourism Director

**NAPLES, MARCO ISLAND, EVERGLADES
CONVENTION & VISITORS BUREAU
2009 STRATEGIC PLAN**

EXECUTIVE SUMMARY

The challenges facing today's destination marketing organizations:

We may be living in one of the most volatile and dynamic eras of our time. Change and uncertainty buffet our daily lives at a dizzying pace, affecting everything from family life to the world geo-political landscape.

Destination marketing organizations are facing a quickly and constantly evolving marketplace. Perennial success through tried and true methods can instantly evaporate as a result of the subtlest market forces. The competition for funding, visitors and share of mind is escalating at a relentless pace. And past success may only bring increased pressures and expectations from destination partners and the community at large.

We must constantly re-evaluate and reconsider what value the leisure and meetings markets place upon our destination experience. We must also be ever vigilant of our requirement to contribute to and provide value to our community.

With the ever-rising cacophony of today's marketplace, we are faced with a growing challenge for visibility. The Internet has given the buyer many more sources for information – demanding speed and transparency in our presentation of rates and benefits – with the consumer rarely having to consider destination marketing organizations as a first stop for information.

Our challenge in this rapidly evolving environment is to not simply be ready to face the demands of today's market, but to anticipate where we'll need to be – outflanking our competition and ensuring our future success. While doing so, we must constantly remember that what we all do to promote our destination isn't about our organization, or about us, but about the customers we're hoping to attract and retain. As Walt Disney once said, "You don't build it for yourself. You know what the people want and you build it for them."

2009 STRATEGIC PLAN – EXECUTIVE SUMMARY

Economic trends affecting visitation:

Our destination has achieved remarkable success in comparison to its competition. While others are experiencing declining ADR and RevPar, plus dramatic downturns in visitation and visitor expenditures, our destination has led its competitive set, proving the wisdom of our past strategies. Within a local and regional economy still restrained by a downturn in a once perennially buoyant housing market, Collier County tourism has persevered as a bright spot in the regional economy.

With a statewide and national economy also affected by the economic effects of a downturn in the housing market, combined with volatile swings in energy costs, we are now seeing pressures affecting our visitation from in-state and domestic markets, requiring revisions of our previous strategies and tactics. Fuel costs are having a tremendous and direct affect on travel, with such broad-reaching effects as families cutting back on distances, to entire airlines trimming routes.

Although the ripple effects of the U.S. economy are being felt worldwide, continued weakness of the U.S. dollar against international currencies opens the need for new markets and initiatives, potentially balancing any negatives that may be experienced from the domestic market.

Although the economy may experience a usual “post-election bounce” in 2009, a myriad and quickly evolving sea of economic factors must be continually monitored and scrutinized, requiring a deft flexibility to our strategies.

Our target markets:

Although Collier County enjoys visitation from diverse areas of origin, wise use of our resources demands that we carefully target our efforts to markets that will give us the highest return. In choosing our targets, careful and constant consideration is given as to where our visitors have historically come from, current and projected availability of access from their geographic location, the potential duration of stay, their potential interest in our destination’s attributes and activities, economic status and disposable income, likelihood to travel, the cost to market to the particular target, and more.

Currently, our target markets are described and delineated geographically as follows:

- 1. In-state markets** of historic origin, and which can access the destination with a four-hour drive. The majority of this target is derived from Southeast Florida, composed of the area from Miami north to West Palm Beach. Other in-state drive markets include Tampa Bay and Orlando. With rising fuel costs and a weakening travel economy, these markets continue to show great importance.
- 2. Domestic U.S. markets** composed of markets of historic origin with drive and lift accessibility, and/or which may show a tendency to visit other Florida beach destinations. Currently these markets include the upper Midwest and the Northeast, primarily concentrated in the Chicago and New York areas.
- 3. International markets** composed of markets of historic origin with lift accessibility and propensity for interest in the attributes and activities of our area. Current geographic targeting is to the United Kingdom, Germany and Canada. Given the weak U.S. dollar, and a rise in this target’s international travel, these targets continue to show importance to our area.

2009 STRATEGIC PLAN – EXECUTIVE SUMMARY

4. Markets of opportunity are constantly being identified and considered. These markets show a potential of increased travel to our area due to their geographic adjacency to current targets, changes in drive or lift access, or changes in global economics. Examples of such markets include areas beyond Chicago and New York in the upper Midwest and Northeast, areas of the Southeast (including Atlanta), and areas in Europe.

Demographics:

Leisure target customers are:

Primary: Adults 25 to 54 with a household income of \$100,000 or more, skewed toward women.

Secondary: Adults 50+ with household incomes of \$100,000 or more, skewed toward women.

Targeting rationale: Women are the primary target due to their historic influence over the travel purchasing process. The ages of 25 to 54 are targeted due to the large number of the population which fall into that age demographic, which is targeted and efficiently served through a variety of message/media conduits (the web, television, etc.). The income level target (though higher than most destinations in the state) reflects a matching of potential targets to the destination as we seek those most likely to enjoy the area's attributes who also have the willingness and wherewithal to afford the average rate of our area properties.

The secondary targets represent audiences which are actively targeted, but which may be reached secondarily, residually, or after resources have been fully directed to the primary targets. These include older adults with greater disposable income and families less likely to seek the family-targeted destinations found elsewhere in the state.

Rationale for all targets has been derived through consultation with our destination's properties; analysis of research provided by our research company, Research Data Services; analysis of research and information from the state's tourism arm, Visit Florida; analysis of historic visitation patterns to our area; a projection of drive and lift patterns; and a consideration and analysis of economic and travel related trends.

Strategic overview by target:

Geographic and demographic differences in our targets require specific strategic approaches to reaching and attracting each. A very brief strategic overview by target follows. More detailed and fully developed strategies for each can be found in the 2009 Strategic Plan.

1. In-state drive: Emphasizing targeting during summer and spring/fall "shoulder" seasons, targeted primarily to Southeast Florida. Reaching primarily adults ages 25 to 54 with household incomes of \$100,000 or more through online advertising, television, print, e-blasts, and public relations.

2. Domestic U.S.: Emphasizing targeting during summer and spring/fall "shoulder" seasons, targeted primarily to upper Midwest and Northeast. Reaching primarily adults ages 25 to 54 with household incomes of \$100,000 or more through online advertising, television, print, e-blasts, and public relations.

2009 STRATEGIC PLAN – EXECUTIVE SUMMARY

3. North America/Canada: A target of economic concern during a slowing economy, efforts will emphasize targeting for fourth quarter and spring/summer visitation, reaching adults 25 to 54 in the Toronto and greater Ontario markets with household incomes of \$100,000 or more. Reached through web advertising, online tour operator sites, television, e-blasts, tour operator/visitor guide ads, travel agent trade support, and public relations.

4. International/U.K.: A target of increased economic concern during a slowing economy, efforts will target tour operators in an effort to reach adults 25 to 54 in the London area with household incomes of \$100,000 (60,000 British Pounds) or more. A target with much longer stays and periods of decision making, efforts will attempt to ensure January and February decision making, attempting to garner visitation in the spring and summer months. Reached through web advertising, online tour operator and travel information sites, e-blasts, travel agent trade support, and public relations.

5. International/Germany: A target of increased economic concern during a slowing economy, efforts will target tour operators in an effort to reach adults 25 to 54 in the areas of Munich, Düsseldorf, Frankfurt, Berlin and Hamburg, with household incomes of \$100,000 (70,000 Euros) or more. Efforts will target January and February to affect fourth quarter, first quarter and spring and summer visitation. Reached through web advertising, online tour operator and travel information sites, e-blasts, travel agent trade support and public relations.

Measuring results:

In an ongoing effort to assure our effectiveness and the efficient fulfillment of our efforts, we carefully monitor and measure our outcomes through the following methods.

- **Focus group research** – Provides insights into our targets, reveals trends and provides a measurement of our messages.
- **Inquiry analysis** – The source, timing, cost, etc. of telephone, email, online and mail inquiries is analyzed monthly, quarterly and annually.
- **Online tracking and analysis** – Number of hits, click-through rates of ads, time spent on site and more is tracked and analyzed.
- **Third-party research** – Whether from the state of Florida, travel trade associations, or through paid third parties (such as Smith Travel Research) we constantly and continually review and analyze data and trends. Additionally, quarterly roundtables are held with the various properties.
- **Media data** – A broad and growing number of sources are constantly considered in order to qualify our selection of media used to reach our targets.
- **In-market quantitative studies** – Monthly interviews provide ongoing analysis and in-depth information about visitors while in the destination.
- **Conversion studies** – Provides insight into visitor activities after they have visited the destination and helps determine which approaches have been the most beneficial in influencing their decision to visit.
- **Tourist development tax** – The ultimate measure of the effectiveness of our efforts, along with ADR, RevPar, in-market spending and other in-market measures of visitation impact.

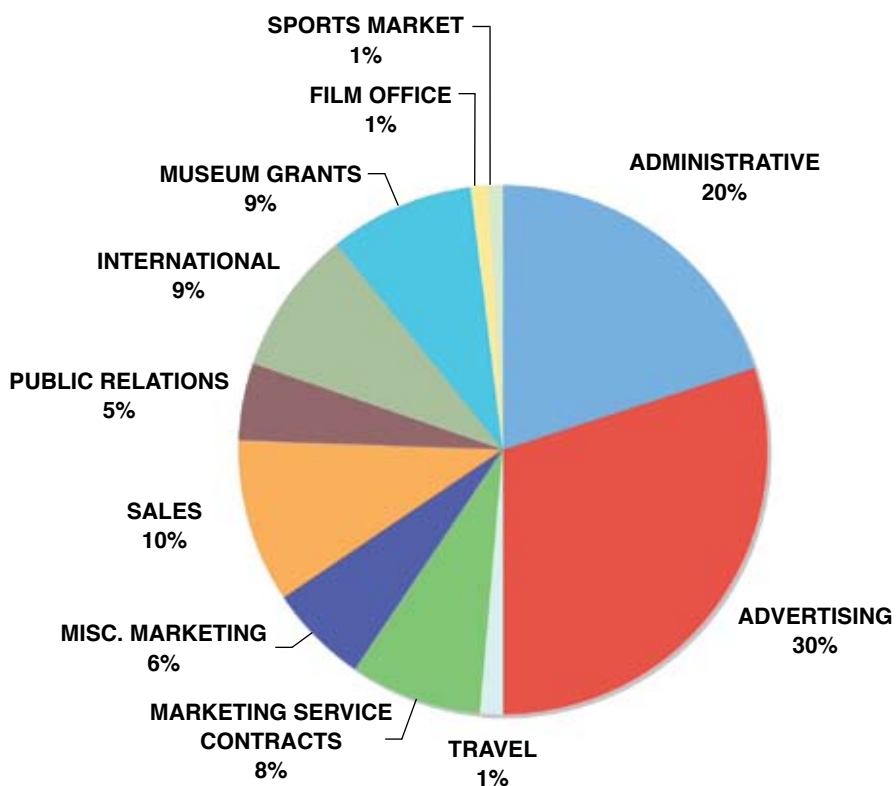
2009 STRATEGIC PLAN - EXECUTIVE SUMMARY

Budget summary:

A brief summary of our budget is as follows, with a more in-depth presentation available within the 2009 Strategic Plan.

FY 09 TOURISM/CVB BUDGET RECAP	AMOUNT	SUB TOTALS	TOTAL
FUND 194- ADMINISTRATIVE			
Personal Services (Salaries)	\$676,600		
Operating Expenses	280,900		
TOTAL OVERHEAD COST		\$957,500	
Transfers:			
Beach Parks Fund 183	199,600		
Beaches & Inlets Fund 195	405,400		
Tax Collector Fees	42,100		
TOTAL TRANSFERS		647,100	
Reserves	0		
TOTAL FUND 194 ADMINISTRATIVE EXPENSES			\$1,604,600
FUND 184- MARKETING & PROMOTION			
Advertising	2,400,000		
Contractual Services	638,500		
Travel Expenses	108,000		
Promotional & Sponsorships	669,565		
Trade Show Registrations	118,200		
TOTAL MARKETING & PROMOTION EXPENSES		3,934,265	
Tax Collector Fees	91,100		
Reserves	167,600		
TOTAL FUND 184- MARKETING AND PROMOTION			\$4,192,965
FUND 193- MUSEUM GRANTS			
Non-County Owned/Operated Museums	675,000		
Tax Collector Fees	8,600		
Reserves	26,300		
TOTAL FUND 193 MUSEUMS			\$709,900
FUND 196- EMERGENCY ADVERTISING			
Carry Forward- Reserves	1,500,000		
Emergency UK, European & Canada Advertising, Research	-615,637		
Transfer from Fund 194 to Fund 196 at FY 09 End	615,637		
TOTAL EMERGENCY ADVERTISING RESERVE			\$1,500,000
TOTAL TOURISM MARKETING & ADMINISTRATIVE BUDGET			\$8,007,465
FUND 198 COUNTY OWNED MUSEUMS			
Operating Budget from TDC Tax			\$1,595,999
TOTAL TOURISM/CVB BUDGET			\$9,603,464
(Does not include Beaches (Fund 195) or Beach Parks (Fund183))			

FY 2009 TOURISM/CVB BUDGET RECAP



- ADMINISTRATIVE
- ADVERTISING
- TRAVEL
- MARKETING SERVICE CONTRACTS
- MISC. MARKETING
- SALES
- PUBLIC RELATIONS
- INTERNATIONAL
- MUSEUM GRANTS
- FILM OFFICE
- SPORTS MARKET

2009 STRATEGIC PLAN – GOALS & OBJECTIVES

OUR GOAL AND OBJECTIVES

Goal:

From year to year, our goal is consistent and remains the same...

Our goal is to encourage overnight visitation to Collier County in an effort to help build occupancy of our taxable accommodations while encouraging the highest levels of attainable visitor expenditures, in an effort to positively affect the economic well being of all Collier County citizens.

Objectives:

Each year, in response to our own success and in reaction to an ever-changing market, we consider and many times devise new, measurable objectives to obtain our goal. As we do, it's important for us to realize the following:

- 1. We do not control the price, product, or delivery of the visitation experience.* Although we may influence, guide, direct, and aid; our role limits us to promoting visitation, not delivering the visitation product.
- 2. We do control some level of promotion, and the sales that we encounter.* Although the area's promotional efforts are also affected by our area partners, we have the ability to provide broad, market-wide awareness. Additionally, although many partners may have a direct line to their own sales, many times our efforts provide direct contact and influence in those sales.
- 3. We influence intentions to travel.* We are not responsible for every facet of the marketing chain. Our primary mission is influencing potential visitors to consider our destination.

The following Objectives for 2009 have been established:

Overall Marketing Objectives

1. Maximize the integration of all CVB resources, partners and programs.
2. Continue to identify and attract targets of highest potential return.
3. Continue to increase awareness of the destination among targeted audiences.
4. Continue to define (brand) the destination as the most attractive alternative vis-à-vis its competitive set.
5. Maximize the efficiency and impact of all efforts through re-purposing, cross utilization, and the efficient purchasing of all resources.
6. Continue to devise new ways to test and fulfill the promise that our destination is "Florida's Last Paradise".

2009 STRATEGIC PLAN – GOALS & OBJECTIVES

Specific Marketing Objectives

1. Maintain the return on investment of all marketing programs and efforts at \$20 to every \$1.
2. Implement strategies and tactics that will increase average stays to 5 days.
3. Implement strategies and tactics that will increase return visits by 2%.
4. Implement strategies and tactics to increase visitor satisfaction by 3%.
5. Increase inquiry response rates to website by 5%.
6. Increase the number of visitors who use www.ParadiseCoast.com as a planning resource by 5%.

**NAPLES, MARCO ISLAND AND THE EVERGLADES
 2009 MEDIA RECOMMENDATION
 October 2008**

Media	Description	Dates	Frequency	2009 Projected	O	N	D	J	F	M	A	M	J	J	A	S
NICHE MEDIA																
Niche Markets - Bridal/Honeymoon																
	Bridal Guide	Insert	May/June, 2009	1x	\$ 40,000.00											
	Brides Florida	1/2 Page 4/C	Semi-Annual	1x	\$ 5,000.00											
	Sub Total:				\$ 45,000.00											
Niche Markets - Fishing																
	Florida Fishing Weekly	1/2 Page 4/C	2x per week	6x	\$ 17,000.00					X	X	X	X	X	X	
	Florida Sportsman	1/2 Page 4/C	May, August & September, 2009	3x	\$ 10,000.00											
	Sub Total:				\$ 27,000.00											
Niche Markets - ECO																
	Audubon - Eco-Tourism Guide	Insert	May/June, 2009	1x	\$ 45,000.00											
	Audubon (Great Florida Birding Trail)	1/2 Page 4/C	Nov/Dec 2008	1x	\$ 7,995.00											
	Audubon (Natural Wonders of Florida)	1/2 Page 4/C	March/April 2009	1x	\$ 6,000.00											
	Echo Encounter	1/2 Page 4/C	March 4, 2009	1x	\$ 4,000.00											
	Undiscovered Florida	1/2 Page 4/C	Annual Guide - May/June	1x	\$ 6,000.00											
	Sub Total:				\$ 68,995.00											
Niche Markets - Golf																
	Play Florida Golf	Spread	Bi-Annual	2x	\$ 15,000.00											
	Faszination Golf Guide	Spread	May/June, 2009	1x	\$ 6,000.00											
	Travel & Leisure Golf	1/2 Page 4/C	March/April 2009	1x	\$ 6,000.00											
	Sub Total:				\$ 27,000.00											
Niche Markets - Senior																
	AAA Going Places South	1/2 Page 4/C	May/June, 2009	1x	\$ 8,000.00											
	AARP - Southeast Region	1/2 Page 4/C	March/April, 2009	1x	\$ 9,660.00											
	Readers Digest	1/2 Page 4/C	June, 2009	1x	\$ 7,500.00											
	Sub Total:				\$ 25,160.00											
Niche Markets - Shopping/Cultural/Dining																
	Art News Guide	Insert	April/May 2009	1x	\$ 45,000.00											
	Gourmet	1/2 Page 4/C	March, 2009	1x	\$ 11,000.00											
	Shop America	1/2 Page 4/C	Spring/Summer 2009	1x	\$ 2,300.00											
	Sub Total:				\$ 58,300.00											
Travel Agent Directories																
	FL Official Travel Industry Guide	1/2 Page 4/C	Jan - December, 2009	1x	\$ 2,460.75											
	Virtuoso	Page 4/C	Nov./Dec., Jan/Feb, March/April	Annual	\$ 50,000.00											
	Virtuoso - Online	Various	Sponsorship Package	Annual												
	Sub Total:				\$ 52,460.75											

Comments

2 co-op partners

**NAPLES, MARCO ISLAND AND THE EVERGLADES
 2009 MEDIA RECOMMENDATION
 October 2008**

Media	Description	Dates	Frequency	2009 Projected	O	N	D	J	F	M	A	M	J	J	A	S
GROUP MEDIA																
Group Business - Corporate																
	Meeting Focus.com	1/2 Page 4/C	April/May 2009	1x	\$ 3,000.00						←→					
	Visit Florida Meeting Professionals Program	1/2 Page 4/C	July - September 2009	1x	\$ 27,000.00										←→	
	Meetings Florida	1/2 Page 4/C	April 2009	1x	\$ 3,000.00						←→					
	Meetings South	1/2 Page 4/C	Nov. 2008 & Feb/April, 2009	3x	\$ 4,552.00	←→			←→		←→					
	Successful Meetings/Meeting News Guide	Insert	May, 2009	1x	\$ 45,000.00						←→					
	Meeting News	1/2 Page 4/C	June, 2009	1x	\$ -								←→			
	Successful Meetings	1/2 Page 4/C	June, 2009	1x	\$ -							←→	←→			
	Sub Total:				\$ 82,552.00											
Group Business - Association																
	FSAE Association Source	1/2 Page 4/C	Nov/Dec., 2008, Jan./Feb. & May, 2009	3x	\$ 3,387.22	←→	←→					←→				
	FSAE Meeting Guide	Outsert	June - 5th Issue	1x	\$ 7,000.00								←→			
	Association News	1/2 Page 4/C	May 2009	1x	\$ 3,500.00								←→			
	FSAE Association Resource	Page 4/C	Annual	1x	\$ 2,375.75								←→	←→		
	TSAE Capital Executive	1/2 Page 4/C	Dec, Mar, June	3x	\$ 1,800.00		←→			←→			←→			
	FSAE Association	Page 4/C	June, 2009	1x	\$ 2,795.00									←→		
	FSAE E-Zine	Various	Annual	1x	\$ 2,500.00	- - -	←→	←→	←→	←→	←→	←→	←→	←→	←→	←→
	Sub Total:				\$ 23,357.97											
Group Business - Leisure																
	SMERF	1/2 Page 4/C	June & August 2009	2x	\$ 3,000.00								←→		←→	
	Sub Total:				\$ 3,000.00											
Group Business - Sports																
	Sports Events - E-blast	Various	Nov., 2008 & May, July 2009	3x	\$ -	←→	←→					←→	←→	←→	←→	←→
	Sports Travel	1/2 Page 4/C	October, April and July	3x	\$ 6,808.50	←→					←→		←→	←→		
	Sports Destination Magazine	1/2 Page 4/C	March/April, May/June, July/August	3x	\$ 4,600.00						←→	←→	←→	←→		
	Sports Events	1/2 Page 4/C	Dec., 2008 & March & May 2009	3x	\$ 5,283.00	←→					←→	←→	←→			
	TOTAL:				\$ 16,691.50											

Comments

1 Co-op partner/Dec.

**NAPLES, MARCO ISLAND AND THE EVERGLADES
 2009 MEDIA RECOMMENDATION
 October 2008**

Media	Description	Dates	Frequency	2009 Projected	O	N	D	J	F	M	A	M	J	J	A	S	Comments
INTERNATIONAL																	
<i>United Kingdom</i>																	
TIA Discover America - Go Guide - Consumer	1/8 Page 4/C	Fall 2008 & Spring 2009	2x	\$ 12,500.00	←	←	←	←	←	←	←	←	←	←	←	←	
Departures - Consumer	1/2 Page 4/C	December 2008	1x	\$ 12,000.00			←	←	←	←	←	←	←	←	←	←	
UK Travel Networks Online - Consumer	Rectangle	October & January & August.	3 Flights	\$ 50,000.00	←	←	←	←	←	←	←	←	←	←	←	←	
Travel Trade Gazette - Knowledge	Page 4/C	November	1x	\$ 6,562.00	←	←	←	←	←	←	←	←	←	←	←	←	
Travel Trade Gazette - Digital Package	E-Newsletters	6 newsletters/4 weeks	6 x	\$ -	←	←	←	←	←	←	←	←	←	←	←	←	
First News - Consumer	History	March	1x	\$ 6,000.00								←	←	←	←	←	
Selling Long Haul (UK)	1/2 Page 4/C	Oct., Nov., February & July	4x	\$ 15,852.00	←	←	←	←	←	←	←	←	←	←	←	←	
Travel Trade Gazette	Full/1/2 Page 4/C	October, January, March	6x - 2/month	\$ 30,000.00	←	←	←	←	←	←	←	←	←	←	←	←	
Visit USA - Newsletters	Single Panel	October, November	2x	\$ 1,530.00	←	←	←	←	←	←	←	←	←	←	←	←	
Bon Voyage	Brochure	October	Annual	\$ 3,000.00	←	←	←	←	←	←	←	←	←	←	←	←	
TTG.com Online	300 x 250	January and March	2 flights	\$ 25,500.00				←	←	←	←	←	←	←	←	←	
United Kingdom Sub Total:				\$ 162,944.00	\$ 87,584											\$ 75,360	
North America (Canada)																	
Canadian Television - Consumer	Various	January. & August	2 Flights	\$ 20,000.00				←	←	←	←	←	←	←	←	←	
Canadian Online - Consumer	Video/Rectangle	January. & August	2 Flights	\$ 20,000.00				←	←	←	←	←	←	←	←	←	
Canadian Travel Agents - Trade	Various	TBD	2 Flights	\$ 3,000.00				←	←	←	←	←	←	←	←	←	
Canadian Sub Total:				\$ 43,000.00	\$ 37,500											\$ 5,500	
Germany																	
Cash (Florida section) Co-op with DERTOOUR - Consumer	Page 4/C	October, 2008	1x	\$ 3,700.00	←	←	←	←	←	←	←	←	←	←	←	←	
German Travel Networks & Tripadvisor.com Online - Consumer	Rectangle	October, January, & August	3 Flights	\$ 40,000.00	←	←	←	←	←	←	←	←	←	←	←	←	
Germany FVW Travel Talk - Trade	1/2 Page 4/C	January & February	4 insertions	\$ 10,000.00				X								X	
FVW Magazine - Trade	1/2 Page 4/C	Bi-Weekly	2 insertions	\$ 14,450.00													
FVW.com - Trade	Rectangle	October, January & August	3 Flights	\$ 13,000.00	←	←	←	←	←	←	←	←	←	←	←	←	
Germany Sub Total:				\$ 81,150.00	\$ 73,500											\$ 7,650	
International & Canadian Markets																	
Discover America - USA Travel Guide - Consumer	Print/Online	TBD	TBD	\$ 15,972.00													
VISITFLORIDA International Travel Planner - Consumer	1/2 Page 4/C	Annual	December - November	\$ 10,682.50	←	←	←	←	←	←	←	←	←	←	←	←	
International - Multiple Markets:				\$ 26,654.50													
INTERNATIONAL TOTALS:				\$ 313,748.50													
FY '09 INTERNATIONAL ECONOMIC EMERGENCY					\$ 198,584												
MEDIA TOTAL:				\$ 2,081,789.60													
INTERNATIONAL PUBLIC RELATIONS:				\$ 10,000.00													

GRAND TOTAL: \$ 2,441,789.60

TOTAL MEDIA BUDGET: \$2,400,000
 ** OVERALL PRODUCTION NOT INCLUDED IN BUDGET

**NAPLES, MARCO ISLAND AND THE EVERGLADES
2009 MEDIA RECOMMENDATION
October 2008**

Media	Description	Dates	Frequency	2009 Projected	O	N	D	J	F	M	A	M	J	J	A	S	Comments
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2009 STRATEGIC PLAN – IMPLEMENTATION SCHEDULE

IMPLEMENTATION SCHEDULE FOR MEDIA

In order to maximize efficiencies, all media will be purchased up-front and finalized by the end of 1st quarter, 2009.

In order of priority, the following implementation schedule will be executed:

- **Television**

- Avail Request (All markets) – December
- Buy Overview to Client – Late January
- Review and make any adjustments – Early February
- Traffic Spots – 2 weeks prior to air date

- **Print**

- Develop media estimates by publication/category during November, December
- Execute all insertion orders to publication once each category has been signed by Client
- Issue mechanical specifications and target audience information internally for creative development by December
- Monitor print editorial and added value for shifts or possible remnant space availabilities

- **Online**

- Begin negotiations for the online plan in early November
- Review options for companion ads, e-blasts and e-newsletters with the Client in December
- Develop media estimates and secure all media in January

- **Direct Marketing**

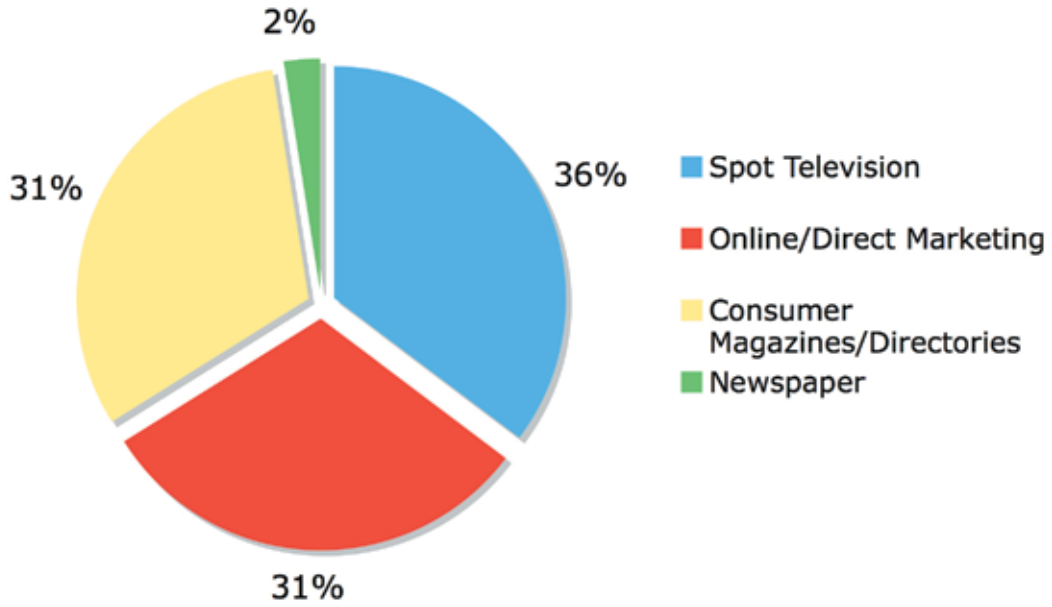
- Review all opportunities and secure approvals for overall schedule in December
- Begin creative process/implementation of approved schedule in December-January

Once all media is secured and purchased, review budget and monitor billing monthly.

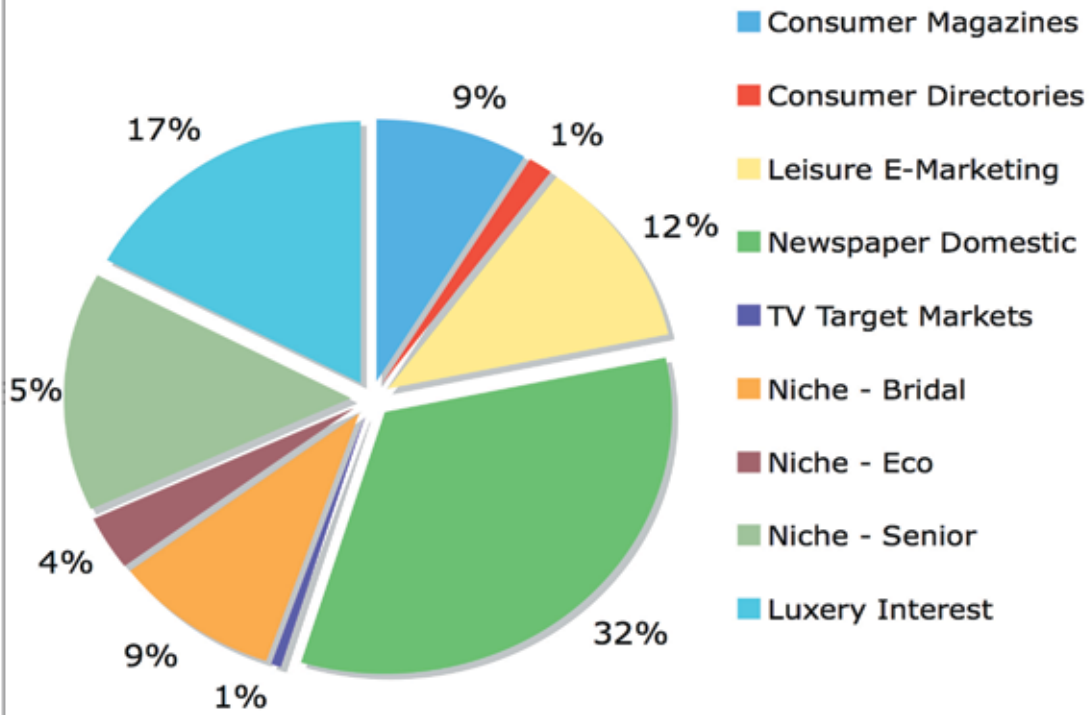
On a monthly basis provide the following information to Client:

- Updated flowchart to include additions/deletions/purchased budget
- Provide ROI chart for print, based on Phase V detailed reports
- HBX trend chart for the month

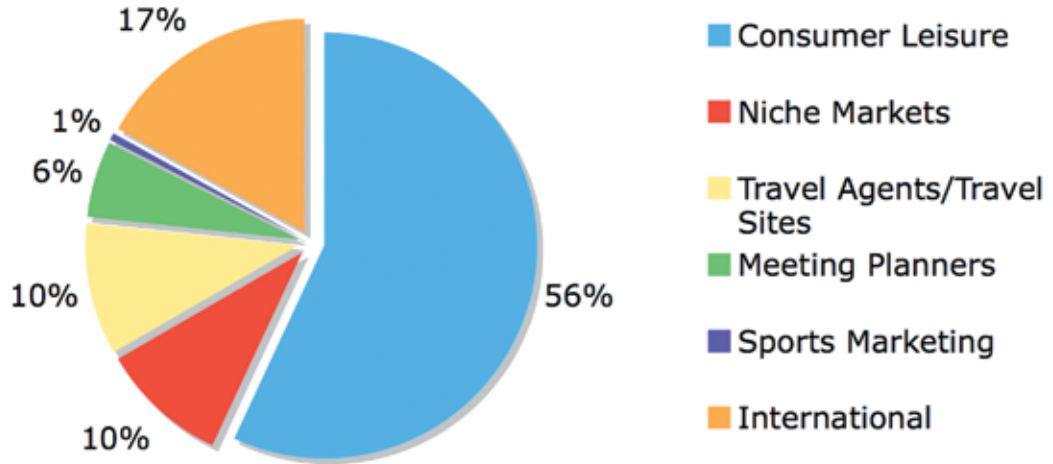
2009 Expenditure by Medium (Against all Targets)



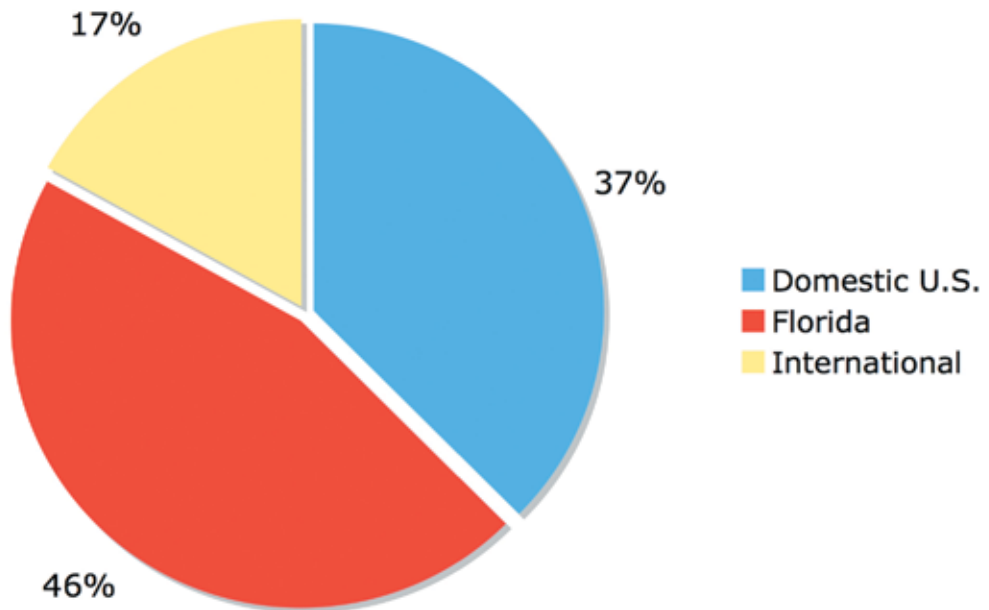
Request Summary by Source



2009 Expenditure by Target Breakdown



2009 Expenditures by Geographic Breakdown





Naples Marco Island
Everglades



PARADISE COASTSM

MARKETING UPDATE

Economic Emergency Response

&

FY 09 Strategic Plan

Economic Emergency Response

- **June TDC Unanimous Recommendation**
 - **Industry Input Meetings**
 - **International Representatives Input**
 - **VISIT FLORIDA, Tour Operator, Media Research**
 - **Marketing Partner Meetings**
 - **Paradise, Miles Media, Klages Research**

Economic Emergency Response

- **July 22nd BCC Unanimous Approval**
 - **Declared Economic Emergency**
 - **More Meetings, More Planning & Negotiations**
- **August – September Rollout**
- **Roll into October '08 – September '09 Plan**

Campaign Overview

- **Objectives:**
 - Increase name and brand awareness
 - Drive inquiries, bookings and overall revenues
- **Situation Analysis:**
 - International – Weakening American dollar and long lead times for vacation planning
 - Domestic – Soft economy & high fuel costs keeping vacation travelers closer to home

Economic Emergency FY '08

- **International**
 - **United Kingdom – Metro London**
 - **Germany – Munich, Düsseldorf, Frankfurt, Berlin and Hamburg**
- **North America**
 - **Canada – Toronto, Ontario**

Economic Emergency FY '08

- **Domestic**

- **S.E. Florida - Miami/Ft. Lauderdale & Palm Beach**

UK

- **Travel Trade**
 - *Selling Long Haul Magazine*
 - **TTG.com**
 - **E-blasts to Florida interested customer base**
- **Consumers**
 - **Print**
 - *VISIT USA Travel Planner '09*
 - *TIA Discover America Go Guide*

UK

- **Consumers (continued)**
 - **Print**
 - ***VISIT FLORIDA Family Travel Promotion***
 - **Eco/Environment insert**
 - **Online**
 - **Travel Ad Network**
 - **Yahoo! Travel Site**
 - **TripAdvisor.com**

Germany

- **Travel Trade**
 - **Print**
 - *FVW and Travel Talk*
 - **Online**
 - **FVW.com**
 - **E-newsletters**
 - **E-blasts**

Germany

- **Consumers**
 - **Online**
 - **Travel Ad Network – 5 top German cities**
 - **TripAdvisor.com – 10,000,000+ traveler reviews**

N. America: Canada

- **Consumer**
 - **Television and Online**
 - **The Weather Channel**
 - **56% penetration in Toronto**
 - **:30 & :10 Billboards “on the 10s”**
 - **Weather.com (Weather Channel online)**
 - **August – October**
 - **#1 News & Information site in Toronto**
 - **Only advertiser on Wednesdays**

Domestic

- **Consumer**
 - **Television**
 - **Miami/Ft. Lauderdale and West Palm Beach**
 - **Extend campaign in #1 Summer Feeder Market**
 - **Online**
 - **Newspapers online in each market**
 - **Home Pages & Travel Sections**
 - **Yahoo! Travel Site**

Economic Emergency

International Creative

UK & Germany

UK Print Creative

- ***Travel Trade Gazette***
- ***TIA Discover America***

“Go Guide”

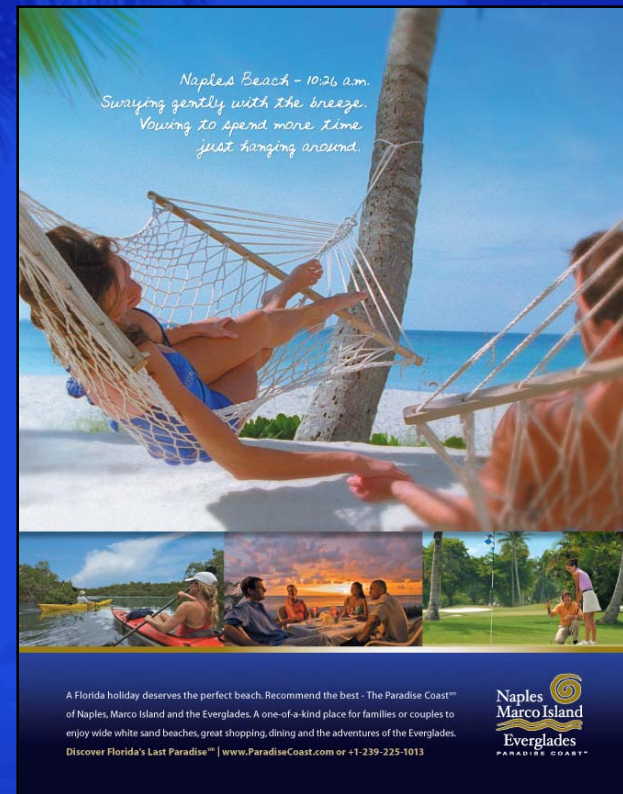


*Naples Beach - 10:26 a.m.
Vowing to spend more time
just hanging around.*

Recommend Florida's one-of-a-kind place for families and couples. Wide white sand beaches, great shopping, dining and the adventures of the Everglades.


Discover Florida's Last Paradise™ | www.ParadiseCoast.com or +1-239-225-1013





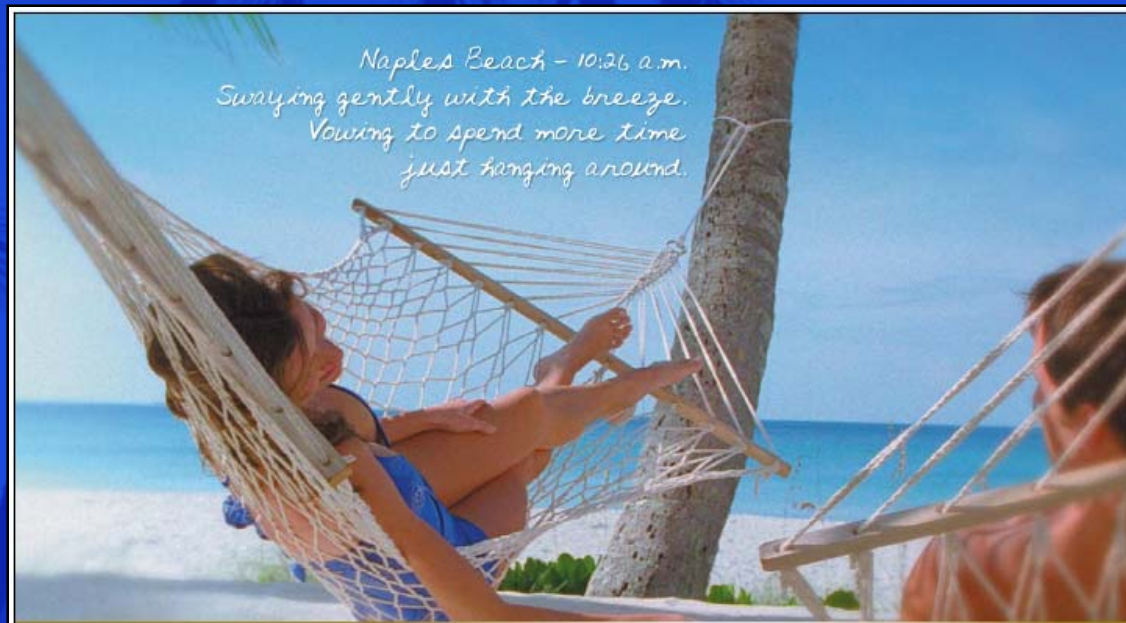
*Naples Beach - 10:26 a.m.
Swaying gently with the breeze.
Vowing to spend more time
just hanging around.*

A Florida holiday deserves the perfect beach. Recommend the best - The Paradise Coast™ of Naples, Marco Island and the Everglades. A one-of-a-kind place for families or couples to enjoy wide white sand beaches, great shopping, dining and the adventures of the Everglades. Discover Florida's Last Paradise™ | www.ParadiseCoast.com or +1-239-225-1013



UK Print Creative

- ***VISIT USA Travel Planner & Selling Long Haul***



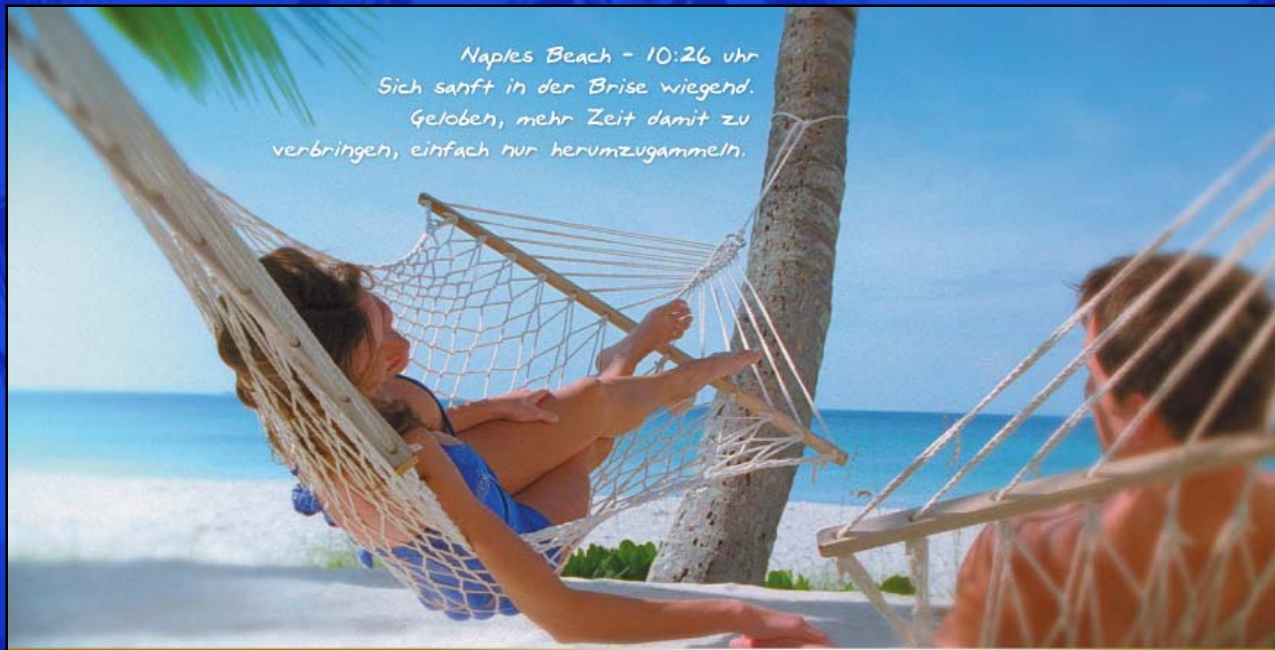
A Florida holiday deserves the perfect beach. Recommend the best - The Paradise Coast™ of Naples, Marco Island and the Everglades. A one-of-a-kind place for families or couples to enjoy wide white sand beaches, great shopping, dining and the adventures of the Everglades.

Discover Florida's Last Paradise™ | www.ParadiseCoast.com or +1-239-225-1013



German Print Creative

- ***FVW & Travel Talk***



Das Beste, was Florida zu bieten hat, alles an einem Ort. Weiße Sandstrände, farbenprächtige Sonnenuntergänge, sanfte Brisen und die warmen Gewässer des Golfs von Mexiko. Speisemöglichkeiten von einfacher bis zu Gourmetküche, die sich durch frische vor Ort gefangene Meeresfrüchte auszeichnet. Dazu kommen noch Einkaufsmöglichkeiten, unglaublich viele Kunstgalerien und Erkundung der Everglades – und man hat das beste Urlaubsziel von Florida gefunden. Entdecken Sie das letzte Paradies Floridas™ | www.ParadiseCoast.com oder 239-225-1013



FY 09 Marketing Recommendations

Cedar Hames & Dave DiMaggio

Targets

- **Demographics:**
 - Adults 25 – 54 weighted towards women
 - \$100,000 + HH income
- **Geographic:**
 - **Domestic:**
 - Miami/Ft. Lauderdale, West Palm Beach, Orlando, Tampa/St. Petersburg/Sarasota, New York & Chicago
 - **International**
 - UK, Germany, Canada

Targets

- Niche Markets:
 - Golf, Bridal, Eco/Nature, Arts & Culture, Fishing, Others
- Travel Trade
- Meeting Planners
- Sports Event Organizers

2009 Media Recommendations

- Domestic
 - Leisure: TV, online, e-blast, support print
 - Niche: Online, print, co-op
 - Travel Trade: Trade print and online
 - Meeting Planners: Trade print and online
 - Sports Event Organizers- Trade Print and online

2009 Media Recommendations

- **Canada/N. America**
 - Leisure: TV, online, support print
 - Trade: Support print
- **UK and Germany**
 - Leisure: Online, e-blast, support print
 - Trade: Online, e-blast, support print

New Initiatives

Niche: Bridal Guide:

- New 16 - page, 4-color guide
- Digital version
- Inserted into *Bridal Guide* publication
 - 25,000 distribution
 - 10,000 overruns
 - Co-op advertising support

New Initiatives

Niche: Eco Guide:

- New 16- page, 4-color guide
- Digital version
- Inserted into *Audubon* publication
 - 90,000 distribution
 - 10,000 overruns
 - Co-op advertising support

New Initiatives

Niche: Arts & Culture:

- 16 - page, 4-color guide
- Digital version
- Inserted into *American Heritage*
 - Co-op advertising support

New Initiatives

Meeting Planner Guide:

- 16- page, 4-color Meeting Planner Guide
- Digital version
- Inserted into *Successful Meetings & Meeting News*
 - 64,000 circulation
 - 10,000 overruns
 - Co-op advertising support

New Initiatives

Economic Emergency Campaign:

Canada/N. America

- **Timing - Media schedule to coincide with tour operator catalog distribution to promote fall and spring visitation**
- **Target Market: Toronto, Ontario**

New Initiatives

Economic Emergency Campaign:

Canada/N. America

- **Media:**
 - **Online: Weather Network**
 - **TV: Weather Channel**

New Initiatives

Economic Emergency Campaign: UK

- **Timing - Media schedule to coincide with tour operator catalog distribution to promote May – October travel**
- **Target Market: London metro**

New Initiatives

Economic Emergency Campaign: UK

- Media:
 - Online: Travel Ad Network UK, Yahoo UK and Trip Advisor
 - E-blast: *TIA Discover America campaign*
 - Travel Trade Support: *Visit USA Travel Planner and Travel Trade Gazette (TTG)*

New Initiatives

Economic Emergency Campaign: Germany

- **Timing - Media schedule to coincide with tour operator catalog distribution to promote spring/summer travel**
- **Target Markets:**
 - Düsseldorf
 - Munich
 - Frankfurt
 - Berlin
 - Hamburg

New Initiatives

Economic Emergency Campaign: Germany

- Media:
 - Online: Travel Ad Network UK, Trip Advisor
 - Travel Trade support: *FVW* and *Travel Talk*

New Initiatives

New Air Service Support Plan:

- Work closely with Southwest Florida International Airport and Naples Airport Authority
- Partner with other airports including:
 - Orlando International
 - Orlando/Sanford International Airport
 - Ft. Lauderdale International Airport
 - Miami International

Marketing emphasis will be on new airlines and new & current direct flights from existing airlines

New Initiatives

Digital Media: Online

- Companion co-op ads: Double ad domination
- Rectangular ad promotes destination
- Banner ad promotes hotel partner
- Direct hyperlink to both destination & hotel websites
- Promote special offers
- Video

New Initiatives

Digital Media E-blasts:

- Added value and new databases
 - Up to five partners
 - Direct hyperlink to destination & hotel websites
 - Promote special offers

New Initiatives

Digital Media SEO:

- **Search Engine Optimization**
 - Use distinct landing pages
 - Heavy use of videos: YouTube use up 80% in 2 years
 - Voice recognition of videos to better capture prospects
 - Target local markets as opposed to “general” click-through advertising
 - Blog campaign targeting prospects such as meeting planners.

Other New Initiatives

- Continue with current brand direction
- Continue to define area as “Florida’s Last Paradise”



Other New Initiatives

- Branding
- Creative tactics
- Collateral and Production

Other New Initiatives

- Branding

Other New Initiatives

- **Branding**
 - **Entry tactics**
 - **In-market identification & branding**
 - **In-market communication**
 - **Exit strategies**

Other New Initiatives

- Branding
 - Entry tactics
 - Airports
 - Welcome Centers



Other New Initiatives

- **Branding**

- **Entry tactics**

- Airports
 - Welcome Centers
 - On - property



Other New Initiatives

- Branding
 - In-Market Identification/Branding
 - In-Room Signage
 - Brand entities unique to market



Other New Initiatives

- Branding
 - In-Market Communication
 - “Unexpected Paradise” Guide
 - In-room television



Other New Initiatives

- Branding
 - Exit Strategies
 - Post-stay surveys
 - Return programs



Other New Initiatives

- Creative Tactics

- Expand Passport to Paradise concept
- Establish Hammock as Icon
- Branded promotional items
- “Certify” the branded experience



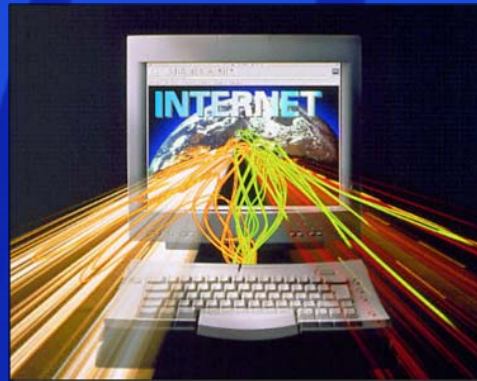
Other New Initiatives

- Creative Tactics
 - Summer Event
 - Green Program
 - Digital Niche Guides



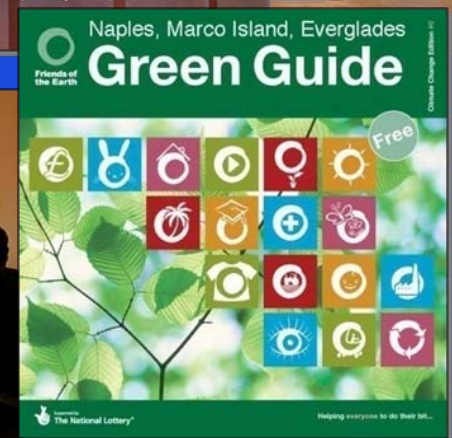
Other New Initiatives

- Collateral/Production Initiatives
 - Consolidate printing
 - Consider electronic/digital at all times
 - Greater utilization of existing video



Other New Initiatives

- Branding
- Creative tactics
- Collateral and Production





QUESTIONS OR COMMENTS?