



Paradise

Monthly Review
Tourist Development Council

February 23rd, 2009

Canadian January Campaign

- Targeted Canadian consumers in January with weather related online and television.
- 835+ unique visits to ParadiseCoast.com in January from Canadian market.
- WeatherNetwork.com in Canada delivered 9% over total purchased impressions.
 - Very efficient cost-per-inquiry of \$18.65

European Campaign

- **United Kingdom**
 - Travel trade promotions planning.
- **Germany**
 - CANUSA, Neckermann and Dertour co-ops completed.
 - Juliana negotiating additional promotions.

Winter Northern Campaign

- Shifted funds for Northern 1st Quarter Campaign.
 - Markets: New York & Chicago
 - Timing: February through mid-April
 - Media Emphasis: Television, online, co-op e-blasts and digital social marketing

Winter Northern Campaign

- “Paradise Priced Perfectly” Campaign
- New website www.MyParadiseSavings.com
- Solicited hotel partners for special rate/value-added packages.
- Results:
 - 1st week of advertising delivered over 3,047 visits to web page including referrals from other sites.
 - Approximately 20 properties participated.

Winter Northern Campaign



65F / 18C



Paradise Coast

Area Interests

- Arts & Culture
- Attractions
- Beaches & Parks
- Dining
- Family Fun
- Golf
- Shopping
- Spas

A Glimpse of Paradise



- Hanging Around
- Cares Melt
- Wild Side



Paradise Priced Perfectly

Warm up with hot hotel deals!

You've found it! Some of the best deals ever in Florida. All in one place!

Just scroll down to find the perfect price and package at the perfect property. Whether you're planning ahead or searching for savings on last minute travel, you've come to the right place. From some of the best Florida vacation packages to the latest travel deals, a Florida getaway has never been so affordable. And while you're here, take some to time online to discover a little more about the Paradise Coast™: Naples, Marco Island and the Everglades. It's a winter getaway you're sure to warm up to.

Marco Island Marriott Resort & Spa
Family Beach Portrait Package - Capture the moment while enjoying your vacation at Marco Island Marriott Beach Resort with our Family Portrait Package.

Bellasera
Receive a \$100 VISA gift Card - Come escape to Naples and discover the art of pure relaxation.

Naples Beach Resort & Golf Club
Family Beach Package - Capture the moment while enjoying your vacation at Naples Beach Resort & Golf Club with your Family.

Hilton Naples
Golf Package - Hilton Naples Golf Package Stay at this award winning 4 diamond Hilton and play golf at Old Corkscrew Golf Club

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Paradise

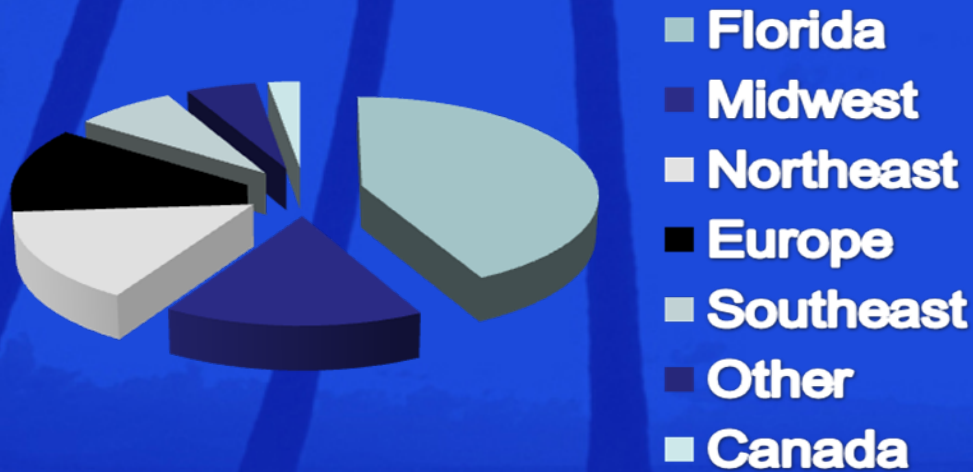
Media Plan Redirection

Winter/Spring 2009

In-State Campaign

- Florida #1 for visitation in 2nd Quarter.

2008 Q2 Visitation



In-State Campaign

- Recommend overlapping Northern Campaign with an In-State Campaign.
- Shift In-State Campaign to begin early March vs. April
- Add geographic targeted online media to extend television reach and frequency.

In-State Campaign

- **Markets:** Miami/Ft. Lauderdale, West Palm Beach, Orlando and Tampa/St. Petersburg
- **Timing:** March through mid-June
- **Media Emphasis:**
 - Spot & cable television
 - Travel and geographically targeted online
 - Digital Social Marketing
- **Total Advertising Schedule:** \$774,463

Media Plan Redirection Discussion/Questions



Paradise

Incremental Media Proposal

1st & 2nd Quarter 2009

Incremental Media Proposal

- Shift leaves July – September with minimal promotions.
- Recommend reinstating shifted funds to extend existing campaigns from reserves, in order of priority:

1. IN-STATE

- Re-instate July – September activity in key markets.
- Total Incremental Spend: \$ 345,500

Incremental Media Proposal

2. INTERNATIONAL

- Reinstated dollars originally planned for Canadian Weather Network online and television advertising during August.

Total Incremental Spend: \$20,052

- Continue efforts in Germany with September online campaign targeting travel trade and consumers.

Total Incremental Spend: \$19,600

- Total International Incremental Spend: \$39,652

Incremental Media Proposal

3. NEW YORK & CHICAGO

- Extend promotional campaign through mid-May.
- Total Incremental Spend: \$101,250

4. NEW NORTHERN MARKETS

- Target new domestic markets: Boston, Philadelphia and Washington D.C.
- Utilize online/digital advertising, which is measurable and low in cost.
- Monitor measured ROI results
- Total Incremental Spend: \$30,000

Incremental Media Proposal

- All campaigns will continuously monitored & tracked
- After each campaign, measure tourist tax collection and visitation statistics.
- Implementation by priority based on tourist tax collection results

Incremental Media Proposal Discussion/Questions

EXECUTIVE SUMMARY

First and Second Quarter 2009 Media Plan Redirection

OBJECTIVE: Review the additional media changes to intensify the First and Second Quarter 2009 media plan to encourage visitation.

CONSIDERATIONS: The Collier County tourism industry with the support of the business community, Chambers of Commerce and cultural organizations are asking for promotional support to attract visitors to our area during the first quarter of 2009. Our area is experiencing the effects of a global economic recession that has slowed to a halt the construction industry, the residential real estate market and has resulted in a reduction in group meeting events. The first quarter is normally our busiest time of year and when area businesses receive the majority of their revenue for the year. If the first quarter, or high season, is not successful, then many businesses are in danger of collapsing later in the year.

At the January 26, 2009 Tourist Development Council (TDC) meeting and the January 27, 2009 County Commission meeting, we received approval to shift some spring and summer media into first quarter. That campaign began February 2 and is already showing good results in the targeted areas of New York and Chicago. On January 26 the TDC recommended with strong tourism industry support, that staff look at ways to allocate additional media dollars to encourage Floridians and other out of state visitors to travel to our area in the first quarter. The TDC directed staff to identify the source of additional promotion funding and make a recommendation at the February 23 TDC meeting.

Staff has worked with Paradise Advertising, Miles Media Group and Klages Research to develop a plan that we feel will effectively deliver our message to these markets. Here is a summary of that recommendation:

In-State

- Shift all current spot/cable television from April to begin week of 3/2 for 8 weeks
 - Run 2-weeks on; 2-weeks off
 - Scheduled end date - 6/7/2009
- Shift on-line media to begin 3/2 including:
 - Expedia.com
 - Vacationplanning.net
 - TAN – Travel Ad Network
- Benefits
 - Condenses advertising support from April – August to March - June
 - Increases cable concentration as part of the overall television mix
 - Condenses Gross Rating Point (GRP) levels from 100 per week to 75 per week without sacrificing appreciable delivery
 - Changes on-line media to 2-weeks on, 2-weeks off
 - Includes PBS stations as part of each market overall television mix

New York/Chicago Markets

- The increased impact of the media shifts into February and March should deliver the desired results.
- We will monitor both markets closely for impression, Cost Per Inquiry and visitation
- Staff and Paradise do not recommend further media efforts at this time

New Domestic Target Markets

- The increased effort from shifting dollars from Spring/Summer to first and second quarter in New York, Chicago and the new effort in our Florida markets represent our best option. New York at # 1, Chicago at # 2 and Florida at # 3 represent our top first quarter feeder markets and should deliver the best Return on Investment (ROI) in terms of inquiries and visitation.
- Annually Florida is # 1, Chicago # 2 and New York is our # 3 feeder market, so this plan will benefit visitation later in the year, as well.

International – United Kingdom

- Staff recommends the reallocation of up to \$46,000 for Tour Operator co-op promotional efforts to be implemented by our UK Representative, Oonagh McCullagh
 - Target April – June or September for implementation
 - Incremental dollars can be funded through:
 - Deletion of 3 insertions in Fishing Weekly (July – September)
 - Deletion of 1 insertion in Florida Sportsman (August)
 - Savings from Meeting Planner Guide production costs

International- Germany & Canada

○ Staff and Paradise Advertising recommend keeping the current plan for these markets in place with no additional dollars allocated due to the excellent response in these markets to date.

Media Budget Redirection Overview:

In-State Marketing Effort

Palm Beach, Ft. Lauderdale, Miami, Orlando, Tampa \$660,000

Out of State Marketing Effort

New York/Chicago \$372,600

Geo Targeted Digital Media

\$ 114,463

Domestic Markets Total

\$1,147,063

International Marketing Effort

UK	\$161,433
Canada	\$ 19,997
Germany	\$ 43,954
Annual Directories in above markets	\$ 44,319

International Markets Total

\$269,703

FISCAL IMPACT: The shifted funds for this revised first and second quarter 2009 media plan totaling \$372,600 are currently budgeted in the approved Fund 184 of the Tourism Department FY 09 budget.

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

RECOMMENDATION: Staff requests the TDC recommend approval of the media plan shifts outlined above totaling \$372,600 and on the attached spreadsheets to begin on March 2, 2009 resulting in a media plan totaling \$ 1,405,461 domestic and \$269,704 International.

SUBMITTED BY: Jack Wert, Tourism Director

2000 - 2008 Collier County Visitation Data (By Quarter)

	2000			2000			2000			2000			Annual	
	Rel. %	# of Vis.		Rel. %	# of Vis.		Rel. %	# of Vis.		Rel. %	# of Vis.		Rel. %	# of Vis.
Florida	20.2	101,286		40.7	125,267		47.5	112,242		33.2	104,402		32.6	443,197
Southeast	9.5	47,634		9.2	28,316		8.4	19,849		7.0	22,012		8.7	117,811
Northeast	29.1	145,911		12.5	38,473		10.7	25,284		15.8	49,685		19.1	259,353
Midwest	23.8	119,337		10.1	31,086		7.9	18,668		15.3	48,113		16.0	217,204
Canada	4.1	20,558		3.1	9,541		1.9	4,490		2.8	8,805		3.2	43,394
Europe	3.7	18,552		15.5	47,706		12.7	30,010		11.1	34,905		9.6	131,173
Other	9.6	48,136		8.9	27,392		10.9	25,757		14.8	46,541		10.9	147,826
Total	100.0	501,414		100.0	307,781		100.0	236,300		100.0	314,463		100.0	1,359,958

	2001			2001			2001			2001			Annual		
	Rel. %	# of Vis.	% Δ	Rel. %	# of Vis.	% Δ	Rel. %	# of Vis.	% Δ	Rel. %	# of Vis.	% Δ	Rel. %	# of Vis.	% Δ
Florida	21.3	109,232	+7.8%	41.8	131,725	+5.2%	50.4	109,707	-2.3%	41.3	113,777	+9.0%	35.2	464,441	+4.8%
Southeast	8.2	42,052	-11.7%	8.5	26,786	-5.4%	9.4	20,461	+3.1%	6.6	18,182	-17.4%	8.1	107,481	-8.8%
Northeast	28.7	147,181	+0.9%	13.1	41,282	+7.3%	8.8	19,155	-24.2%	14.1	38,844	-21.8%	18.7	246,463	-5.0%
Midwest	25.3	129,745	+8.7%	14.6	46,009	+48.0%	10.4	22,638	+21.3%	16.1	44,354	-7.8%	18.4	242,746	+11.8%
Canada	4.8	24,616	+19.7%	3.0	9,454	-0.9%	2.7	5,877	+30.9%	2.2	6,061	-31.2%	3.5	46,008	+6.0%
Europe	4.0	20,513	+10.6%	12.7	40,022	-16.1%	9.3	20,244	-32.5%	8.1	22,314	-36.1%	7.8	103,093	-21.4%
Other	7.7	39,488	-18.0%	6.3	19,853	-27.5%	9.0	19,590	-23.9%	11.6	31,957	-31.3%	8.4	110,888	-25.0%
Total	100.0	512,827	+2.3%	100.0	315,131	+2.4%	100.0	217,672	-7.9%	100.0	275,489	-12.4%	100.0	1,321,120	-2.9%

	2002			2002			2002			2002			Annual		
	Rel. %	# of Vis.	% Δ	Rel. %	# of Vis.	% Δ	Rel. %	# of Vis.	% Δ	Rel. %	# of Vis.	% Δ	Rel. %	# of Vis.	% Δ
Florida	24.5	121,589	+11.3%	43.5	130,219	-1.1%	52.8	113,300	+3.3%	37.7	112,749	-0.9%	36.5	477,857	+2.9%
Southeast	7.7	38,213	-9.1%	8.9	26,643	-0.5%	8.9	19,098	-6.7%	9.7	29,010	+59.6%	8.6	112,964	+5.1%
Northeast	28.0	138,959	-5.6%	12.0	35,922	-13.0%	8.4	18,025	-5.9%	16.4	49,047	+26.3%	18.5	241,953	-1.8%
Midwest	27.0	133,996	+3.3%	16.9	50,591	+10.0%	11.5	24,677	+9.0%	17.0	50,842	+14.6%	19.9	260,106	+7.2%
Canada	3.7	18,362	-25.4%	1.8	5,388	-43.0%	1.7	3,648	-37.9%	1.9	5,682	-6.3%	2.5	33,080	-28.1%
Europe	3.5	17,370	-15.3%	9.0	26,942	-32.7%	7.9	16,952	-16.3%	11.1	33,197	+48.8%	7.2	94,461	-8.4%
Other	5.6	27,792	-29.6%	7.9	23,649	+19.1%	8.8	18,884	-3.6%	6.2	18,542	-42.0%	6.8	88,867	-19.9%
Total	100.0	496,281	-3.2%	100.0	299,354	-5.0%	100.0	214,584	-1.4%	100.0	299,069	+8.6%	100.0	1,309,288	-0.9%

2000 - 2008 Collier County Visitation Data (By Quarter)

2003

	First Quarter			Second Quarter			Third Quarter			Fourth Quarter			Annual		
	Rel. %	# of Vis.	% Δ	Rel. %	# of Vis.	% Δ	Rel. %	# of Vis.	% Δ	Rel. %	# of Vis.	% Δ	Rel. %	# of Vis.	% Δ
Florida	23.4	111,983	-7.9%	43.3	136,356	+4.7%	51.2	116,618	+2.9%	38.1	115,601	+2.5%	36.3	480,558	+0.6%
Southeast	7.8	37,327	-2.3%	8.7	27,397	+2.8%	8.7	19,816	+3.8%	9.4	28,521	-1.7%	8.5	113,061	+0.1%
Northeast	28.6	136,868	-1.5%	14.3	45,032	+25.4%	9.1	20,727	+15.0%	16.7	50,670	+3.3%	19.1	253,297	+4.7%
Midwest	27.1	129,689	-3.2%	17.0	53,535	+5.8%	11.4	25,966	+5.2%	17.0	51,581	+1.5%	19.7	260,771	+0.3%
Canada	3.3	15,792	-14.0%	1.4	4,409	-18.2%	1.3	2,961	-18.8%	1.7	5,158	-9.2%	2.1	28,320	-14.4%
Europe	4.3	20,578	+18.5%	9.1	28,657	+6.4%	9.9	22,549	+33.0%	11.0	33,376	+0.5%	7.9	105,160	+11.3%
Other	5.5	26,321	-5.3%	6.2	19,525	-17.4%	8.4	19,133	+1.3%	6.1	18,508	-0.2%	6.3	83,487	-6.1%
Total	100.0	478,558	-3.6%	100.0	314,911	+5.2%	100.0	227,770	+6.1%	100.0	303,415	+1.5%	100.0	1,324,654	+1.2%

2004

	First Quarter			Second Quarter			Third Quarter			Fourth Quarter			Annual		
	Rel. %	# of Vis.	% Δ	Rel. %	# of Vis.	% Δ	Rel. %	# of Vis.	% Δ	Rel. %	# of Vis.	% Δ	Rel. %	# of Vis.	% Δ
Florida	24.2	123,103	+9.9%	41.0	135,997	-0.3%	54.9	146,515	+25.6%	41.7	141,926	+22.8%	37.8	547,541	+13.9%
Southeast	8.0	40,695	+9.0%	8.0	26,536	-3.1%	8.1	21,617	+9.1%	8.0	27,228	-4.5%	8.0	116,076	+2.7%
Northeast	28.0	142,433	+4.1%	16.0	53,072	+17.9%	8.5	22,684	+9.4%	14.7	50,032	-1.3%	18.5	268,221	+5.9%
Midwest	23.9	121,577	-6.3%	18.2	60,370	+12.8%	10.0	26,688	+2.8%	16.1	54,796	+6.2%	18.2	263,431	+1.0%
Canada	3.5	17,804	+12.7%	1.9	6,302	+42.9%	0.8	2,135	-27.9%	2.1	7,147	+38.6%	2.3	33,388	+17.9%
Europe	7.9	40,186	+95.3%	10.6	35,160	+22.7%	9.7	25,887	+14.8%	11.6	39,481	+18.3%	9.7	140,714	+33.8%
Other	4.5	22,891	-13.0%	4.3	14,263	-27.0%	8.0	21,350	+11.6%	5.8	19,740	+6.7%	5.4	78,244	-6.3%
Total	100.0	508,689	+6.3%	100.0	331,700	+5.3%	100.0	266,876	+17.2%	100.0	340,350	+12.2%	100.0	1,447,615	+9.3%

2005

	First Quarter			Second Quarter			Third Quarter			Fourth Quarter			Annual		
	Rel. %	# of Vis.	% Δ	Rel. %	# of Vis.	% Δ	Rel. %	# of Vis.	% Δ	Rel. %	# of Vis.	% Δ	Rel. %	# of Vis.	% Δ
Florida	24.0	126,000	+2.4%	43.5	146,945	+8.1%	51.1	123,959	-15.4%	42.1	130,674	-7.9%	37.3	527,578	-3.6%
Southeast	7.4	38,850	-4.5%	7.9	26,687	+0.6%	7.7	18,679	-13.6%	8.7	27,004	-0.8%	7.9	111,220	-4.2%
Northeast	27.1	142,274	-0.1%	14.4	48,644	-8.3%	9.6	23,288	+2.7%	14.2	44,076	-11.9%	18.2	258,282	-3.7%
Midwest	24.4	128,099	+5.4%	17.2	58,103	-3.8%	11.0	26,684	-0.0%	15.2	47,179	-13.9%	18.4	260,065	-1.3%
Canada	3.3	17,325	-2.7%	2.1	7,094	+12.6%	1.0	2,426	+13.6%	2.4	7,449	+4.2%	2.4	34,294	+2.7%
Europe	10.3	54,075	+34.6%	10.9	36,821	+4.7%	11.9	28,867	+11.5%	11.8	36,626	-7.2%	11.0	156,389	+11.1%
Other	3.5	18,375	-19.7%	4.0	13,512	-5.3%	7.7	18,678	-12.5%	5.6	17,382	-11.9%	4.8	67,947	-13.2%
Total	100.0	524,998	+3.2%	100.0	337,806	+1.8%	100.0	242,581	-9.1%	100.0	310,390	-8.8%	100.0	1,415,775	-2.2%

2000 - 2008 Collier County Visitation Data (By Quarter)

2006

	First Quarter			Second Quarter			Third Quarter			Fourth Quarter			Annual		
	Rel. %	# of Vis.	% Δ	Rel. %	# of Vis.	% Δ	Rel. %	# of Vis.	% Δ	Rel. %	# of Vis.	% Δ	Rel. %	# of Vis.	% Δ
Florida	26.1	127,202	+1.0%	44.6	152,998	+4.1%	56.0	142,297	+14.8%	43.6	138,299	+5.8%	40.0	560,796	+6.3%
Southeast	8.3	40,451	+4.1%	8.8	30,188	+13.1%	6.9	17,533	-6.1%	6.8	21,570	-20.1%	7.8	109,742	-1.3%
Northeast	26.2	127,690	-10.3%	14.2	48,712	+0.1%	9.1	23,123	-0.7%	12.7	40,284	-8.6%	17.1	239,809	-7.2%
Midwest	23.6	115,018	-10.2%	16.5	56,602	-2.6%	9.3	23,632	-11.4%	15.8	50,118	+6.2%	17.5	245,370	-5.7%
Canada	3.0	14,621	-15.6%	2.0	6,861	-3.3%	1.1	2,795	+15.2%	2.9	9,199	+23.5%	2.4	33,476	-2.4%
Europe	8.2	39,964	-26.1%	9.4	32,246	-12.4%	11.0	27,951	-3.2%	12.2	38,698	+5.7%	9.9	138,859	-11.2%
Other	4.6	22,419	+22.0%	4.5	15,437	+14.2%	6.6	16,771	-10.2%	6.0	19,032	+9.5%	5.3	73,659	+8.4%
Total	100.0	487,365	-7.2%	100.0	343,044	+1.6%	100.0	254,102	+4.7%	100.0	317,200	+2.2%	100.0	1,401,711	-1.0%

2007

	First Quarter			Second Quarter			Third Quarter			Fourth Quarter			Annual		
	Rel. %	# of Vis.	% Δ	Rel. %	# of Vis.	% Δ	Rel. %	# of Vis.	% Δ	Rel. %	# of Vis.	% Δ	Rel. %	# of Vis.	% Δ
Florida	24.3	118,385	-6.9%	46.2	154,585	+1.0%	51.5	130,691	-8.2%	42.2	134,410	-2.8%	38.6	538,071	-4.1%
Southeast	7.8	38,000	-6.1%	8.4	28,106	-6.9%	6.6	16,749	-4.5%	6.1	19,321	-10.4%	7.3	102,176	-6.9%
Northeast	26.6	129,590	+1.5%	14.5	48,517	-0.4%	11.5	29,184	+26.2%	13.3	42,161	+4.7%	17.9	249,452	+4.0%
Midwest	24.8	120,821	+5.0%	15.0	50,190	-11.3%	10.2	25,885	+9.5%	15.7	50,012	-0.2%	17.7	246,908	+0.6%
Canada	3.3	16,077	+10.0%	1.8	6,023	-12.2%	1.1	2,791	-0.1%	2.7	8,721	-5.2%	2.4	33,612	+0.4%
Europe	8.5	41,410	+3.6%	9.2	30,783	-4.5%	11.2	28,422	+1.7%	12.8	40,785	+5.4%	10.1	141,400	+1.8%
Other	4.7	22,897	+2.1%	4.9	16,396	+6.2%	7.9	20,048	+19.5%	7.2	22,860	+20.1%	5.9	82,201	+11.6%
Total	100.0	487,180	-0.0%	100.0	334,600	-2.5%	100.0	253,770	-0.1%	100.0	318,270	+0.3%	100.0	1,393,820	-0.6%

2008

	First Quarter			Second Quarter			Third Quarter			Fourth Quarter			Annual		
	Rel. %	# of Vis.	% Δ	Rel. %	# of Vis.	% Δ	Rel. %	# of Vis.	% Δ	Rel. %	# of Vis.	% Δ	Rel. %	# of Vis.	% Δ
Florida	21.9	110,651	-6.5%	42.5	145,332	-6.0%	50.3	126,648	-3.1%	42.4	134,008	-0.3%	36.5	516,639	-4.0%
Southeast	7.5	37,635	-1.0%	7.6	26,086	-7.2%	6.1	15,412	-8.0%	6.6	20,894	+8.1%	7.1	100,027	-2.1%
Northeast	28.0	141,170	+8.9%	15.2	52,011	+7.2%	10.2	25,563	-12.4%	9.8	30,962	-26.6%	17.7	249,706	+0.1%
Midwest	25.3	127,269	+5.3%	16.1	55,296	+10.2%	8.5	21,356	-17.5%	14.0	44,152	-11.7%	17.5	248,073	+0.5%
Canada	3.1	15,618	-2.9%	2.4	8,338	+38.4%	1.3	3,325	+19.1%	2.7	8,615	-1.2%	2.5	35,896	+6.8%
Europe	9.1	45,709	+10.4%	11.0	37,543	+22.0%	16.9	42,481	+49.5%	19.6	62,057	+52.2%	13.2	187,790	+32.8%
Other	5.1	25,648	+12.0%	5.2	17,654	+7.7%	6.7	16,915	-15.6%	4.9	15,412	-32.6%	5.3	75,629	-8.0%
Total	100.0	503,700	+3.4%	100.0	342,260	+2.3%	100.0	251,700	-0.8%	100.0	316,100	-0.7%	100.0	1,413,760	+1.4%