

## **EXECUTIVE SUMMARY**

### **Review and recommend approval of the Fiscal Year 2011 Strategic Plan for the Naples Marco Island, Everglades Convention & Visitors Bureau (CVB).**

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**OBJECTIVE:** Review the strategic plan for the destination for FY 11 commencing October 1, 2010.

**CONSIDERATIONS:** During the year, the CVB conducts meetings with its marketing partners at bi-monthly Advisory Roundtables to gather information on marketing the destination. The CVB also sponsors an annual co-op marketing event to showcase to partners the many advertising and trade show opportunities available for the coming year. These meetings culminate in a strategic planning retreat held in July. This day-long event includes Paradise Advertising and Marketing, Inc., BCF, Public Relations, Miles Media Group, Phase V Fulfillment, Klages Research, SMT, Inc., Visit Florida, Naples and Lee County Airport Authorities, and the representatives from the various Chamber organizations. The data collected from all of these sources is compiled, resulting in the annual strategic plan to manage the tourism department and market the destination. The TDC recommended at the October 25, 2010 meeting that the plan be reviewed by the Collier County Lodging and Tourism Alliance. This was accomplished on October 29, 2010 and their suggestions are included in this revised plan.

The attached pages are the Executive Summary of the full strategic plan for marketing Collier County worldwide as a tourism destination of choice in 2011.

**LEGAL CONSIDERATIONS:** This item has been reviewed by the County Attorney's Office and is legally sufficient for Board action. - CMG

**FISCAL IMPACT:** The projected FY 2011 marketing budget to support this strategic plan is \$3,200,000. The approved FY 2011 regular marketing budget as contained within Fund (184) equals approximately \$2,000,000. The additional \$1,200,000 in marketing dollars is offset by re-allocating \$1,000,000 from Beach Park Facilities Fund (183) in accordance with Board action on September 14, 2010 and re-directing approximately \$200,000 in interest income from the family of tourist tax funds (primarily interest from Beach Renourishment Fund (195) and Beach Park Facility Fund (183) and diverting those interest dollars for marketing and promotion as budgeted in Fund (184). Use of interest income for marketing and promotion will extend for three years pursuant to Board action on December 15, 2009 – Item 16(F) 3.

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

**RECOMMENDATION:** That the Tourist Development Council review and recommend approval of the FY 11 Strategic Plan for the Naples, Marco Island, Everglades Convention & Visitors Bureau (CVB).

**SUBMITTED BY:** Jack Wert, Tourism Director

## SITUATION ANALYSIS

### OVERVIEW

Both 2009 and 2010 have been difficult years. We seem to be turning the corner on the economic crisis, but continual destination marketing is essential to keep The Paradise Coast competitive in the tourism marketplace. The Gulf oil spill and other natural and manmade situations continue to challenge our destination.

The demand for travel to the destination has been declining for the past three years. However, beginning in the first quarter of 2010, that negative trend started to show signs of more positive movement. Currently, occupancy rates on the Paradise Coast are on par with our competitive set, while attaining the second highest Average Daily Rate (behind the Florida Keys. See chart below).

### Tab 2 - Multi-Segment

Naples, Marco Island, Everglades CVB  
 For the month of: September 2010

	Year to Date - September 2010 vs September 2009											
	Occ %		ADR		RevPAR		Percent Change from YTD 2009					
	2010	2009	2010	2009	2010	2009	Occ	ADR	RevPAR	Room Rev	Room Avail	Room Sold
Florida Keys	73.2	72.2	179.94	172.79	131.80	124.78	1.4	4.1	5.6	7.4	1.6	3.1
Miami-Hialeah, FL	70.1	65.0	146.08	142.18	102.41	92.38	7.9	2.7	10.9	14.3	3.1	11.3
Naples MSA Upscale Chains	67.4	63.6	212.80	215.06	143.49	136.74	6.1	-1.1	4.9	5.4	0.4	6.5
Fort Lauderdale, FL	66.9	62.5	110.37	112.63	73.88	70.39	7.1	-2.0	5.0	10.0	4.8	12.2
Palm Beach County, FL	63.3	57.4	127.12	132.06	80.48	75.74	10.4	-3.7	6.3	9.3	2.9	13.6
Clearwater	59.8	60.4	104.09	107.25	62.26	64.81	-1.0	-2.9	-3.9	-1.9	2.1	1.1
<b>Naples MSA</b>	<b>59.3</b>	<b>56.3</b>	<b>168.64</b>	<b>168.81</b>	<b>99.98</b>	<b>95.11</b>	<b>5.2</b>	<b>-0.1</b>	<b>5.1</b>	<b>6.3</b>	<b>1.2</b>	<b>6.4</b>
St Petersburg	57.9	54.6	109.78	118.50	63.53	64.68	6.0	-7.4	-1.8	-1.8	-0.0	6.0
Naples MSA Independents	56.9	53.2	152.22	147.46	86.58	78.48	6.9	3.2	10.3	10.2	-0.1	6.7
Sarasota-Bradenton, FL	56.0	54.1	106.06	113.35	59.37	61.37	3.4	-6.4	-3.3	0.1	3.5	7.0
Fort Myers, FL	50.4	49.0	123.59	132.23	62.29	64.80	2.9	-6.5	-3.9	2.4	6.5	9.6
Naples MSA Midscale Chains	47.4	48.4	80.82	83.29	38.34	40.35	-2.1	-3.0	-5.0	1.4	6.7	4.5

\*Smith Travel Research

Predictions indicate that people will still travel for business and leisure in the future, but they will travel less often and for shorter distances (4 hours or less) and likely trade down in accommodations, food and activities. As destination marketers we must stay optimistic, realistic and out in front of our tourism partners and our customers with new creative approaches and technology enhancements.

The influx of additional marketing funds by the County Commission in December 2009 from Beach Renourishment Reserves was a welcome addition to our marketing efforts. It's been proven over the past eight years that given the resources, we can return a sizable economic impact to our community. To date in 2010, The Paradise Coast has shown a 20-to-1 return on visitor spending to ad dollars spent to attract those visitors.

A dedicated funding source for year-round destination marketing is essential to our future promotional efforts. Whether that funding comes from re-allocation of the existing tax structure, or some other method, funding sourcing needs to be decided soon to enable the destination to remain competitive and to continue to allow tourism to be the most dependable economic driver in our community.

The April, 2010 oil spill in the Gulf may plague The Paradise Coast for many years to come and we must be ready to dedicate the dollars and resources necessary to keep visitors coming to the area. The national and international news media may continue to paint a negative picture long after the event. We need to continue to be prepared to counteract that negative publicity with words, pictures, video and satisfied customer testimonials.

## **Major Trends**

The challenges the destination will face this coming year include ones that our nation and the entire tourism industry are facing. Here are some examples:

### **Economic and Tourism Industry Trends**

- The destination has achieved remarkable success in comparison to our competitive set, and has been a bright spot in our local economy during the world-wide economic crisis over the past 18 months.
- The Gulf oil spill may continue to have negative effects on future visitation, spending and visitor image as a desirable destination.
- The outlook for more active hurricane seasons could exacerbate the oil spill and further drive down visitation.
- The possibility of rising fuel costs, inflation and the continued weakness of the U.S. dollar could affect domestic and international travel, pointing to the need for greater emphasis on in-state and drive distance feeder markets.
- The threat of terrorism is unabated and the ongoing difficulty of entering the U.S. as a foreign visitor will continue to impact the Paradise Coast's share of market for international travelers.
- The Paradise Coast's potential visitor has more options than ever before. Gone are the days when Florida stood alone as the annual family vacation destination. We are now faced with strong competitive efforts from many other areas of the country and a growing number of international destinations.
- Additionally, societal changes are affecting potential visitors such as in the rise of "green travel." Visitors of all types are showing a greater sensitivity to ecological concerns and a growing favoritism to destinations, accommodations, activities and travel sources that exhibit some degree of concern for the environment.
- A growing number of visitors want to learn more about their chosen destination and get involved in some way once they are there. Many choose destinations solely for the opportunities for study that the destination may provide.

### **Technology Trends:**

- Changes occur every day and we must keep pace.
- Price transparency is now the norm, and regardless of the source of information, the traveler knows how to seek out the best value for their vacation or meeting needs.
- Over 80% of travelers use online booking engines for air and accommodation reservations.

- Smartphones are expected to account for 33% of the U.S. mobile phone market in Q4 2010 and then accelerate in 2011, hitting 40% in Q1 2011 (The Nielsen Company).
- Use of social platforms, such as Facebook and Twitter, continues to increase. Current registered users for Facebook is over 500 million and over 105 million for Twitter.
- Nearly 70% of travelers are sharing their photos, videos and comments on their vacation experiences with perfect strangers world-wide.

**Political Trends:**

- The Paradise Coast's local municipal leadership will need to receive periodic reminders of the importance of visitor spending to their communities.
- 2/3 of the Florida legislators will term out or change in 2011. This will require more time and effort to educate the new ones and re-educate the returning ones on the benefits of tourism to the state.
- The Travel Promotion Act will assist the U.S. in gaining back some lost market share of international visitors. But the political fight over the promotion dollars created by the Act will drag out for several years.

**Social Trends:**

- Families are spending more time together. Kid travel is increasing.
- 70% of leisure trips are for "special occasions."
- 33% of travelers select a destination based on a "good deal."
- 60% of travelers will choose a totally new location this next year.

**Economic Trends:**

- We are all being asked to do more and do it better, with fewer resources.
- The worldwide economic downturn has negatively impacted travel to the U.S. and may affect our International visitation numbers in the future.

**Other Market Factors:**

VISIT FLORIDA continues to be one of The Paradise Coast's strongest strategic partners. Their funding has increased slightly for 2011, so there are more co-op opportunities for us to consider.

The Paradise Coast's international feeder markets should rebound in 2011. Our emphasis should continue with Tour Operator co-ops as coordinated by our International Representatives in the U.K. and Europe.

**Market Intelligence:**

It is always important to compile and consider all the information available concerning our competition, our environment, and other forces that may affect our efforts. For 2011, the following SWOT Analysis (Strengths, Weaknesses, Opportunities and Threats) represents some of the information that has been considered in formulating our plan.

### **Strengths**

- The Paradise Coast's destination/brand attributes: beautiful beaches, the Everglades and nature experiences, superb shopping, unique dining and more.
- Part of Florida – consistently a top world-wide travel destination
- International Airport with direct service to and from domestic and international markets
- Dedicated, renewable funding source (Tourist Development Tax)
- Year-round employment opportunities
- Visitor spending leaves surplus of funds for community's benefit
- The best, most dedicated and professional Destination Marketing Operation staff of The Paradise Coast's competing destinations
- Accredited DMO (Destination Marketing Organization) by Destination Marketing Accreditation Program
- High level of partner trust and support of the CVB's destination marketing direction
- Favorable international currency exchange rates

### **Weaknesses**

- Limited DMO marketing budget in a highly competitive marketplace
- Very small CVB staff, limiting increased effectiveness
- Some continued misunderstanding of the positive impacts of visitors on our community and economy
- Higher than average airfares into Southwest Florida International Airport
- Longer than average travel time from Southwest Florida International Airport to parts of our destination such as Marco Island.

### **Opportunities**

- New air service to RSW and Naples will make the Paradise Coast more accessible to visitors
- Growth of meeting business encourages resort and hotel expansion and enhancement
- Community Relations delivers the correct tourism message to government and residents alike
- A better known, stable and respected CVB will result in more leads and visitation
- Outsourcing of current and future labor needs will assist DMO staffing levels – Discussions and ongoing marketing assistance to Ft. Myers Airport (RSW) to attract more air service and lower transportation costs to our area

### **Threats**

- Natural and man-made disasters discourage new and repeat visitation
- Homeland Security mandates may discourage international visitation

- Favorable currency exchange rates could reverse
- County hiring and wage freeze means no departmental growth and possible staff “burnout”
- Condo and single family rentals continue to erode limited-service hotel occupancy
- Internet booking of hotels limits our potential tourist tax revenue

## **MARKETING PLAN**

### **Target Markets**

The following should be considered as our 2011 target market segments in order of importance:

#### **Leisure Market:**

1. In-State Residents
2. Northeast U.S.
3. Midwest U.S.
4. Southeast U.S.

#### **International Visitors Market (Leisure)**

1. Germany
2. U.K.
3. Canada

#### **Leisure Markets of Opportunity**

- Boston
- Cleveland
- Atlanta
- Brazil

#### **Group Meetings Market:**

- Corporate
- In-State Associations
- Out-of-State Associations
- SMERF (Social, Military, Education, Religious, Fraternal)

## **DEMOGRAPHICS**

Currently, The Paradise Coast's primary visitors are in the Boomer generation, who are currently 46-64 years of age. However, the average age of The Paradise Coast's visitors is declining each year. We need to consider how that age factor will impact our marketing efforts in the future. We need to continue to improve The Paradise Coast's appeal to a younger, more tech-savvy visitor utilizing the technology they use every day. National research indicates that this age group tends to have both the highest Mean and Median incomes (Spring MRI Single base).

## **Objectives for 2011**

The primary corporate objective of The Paradise Coast's DMO will be to keep up and hopefully stay ahead of our customer needs. The customer is king and we must listen to what the customer is telling us in terms of message delivery. We must be able to adjust quickly to market trends and to use the right distribution channels that will bring us the best return on our marketing investment.

### **Marketing Objectives**

- Increase brand awareness by 10%
- Increase "Signals of Intent to Travel" by 5%
- Grow ROI (Return on Investment) from \$20 for each marketing dollar invested to \$22
- Grow annual visitation by 2%
- Grow annual average occupancy above 62%
- Increase annual tourist tax revenues by 3%
- Increase destination editorial coverage by 2%
- Build demand to positively influence and grow monthly ADR (Average Daily Rate) levels

## **STRATEGIC INITIATIVES**

1. The most important strategy this year will be mobile communications. Whatever we create this year must be viewable and actionable on mobile devices. Mobile devices are always there and most always "on". They will quickly become the primary source for feeding and receiving social media messaging.

- a. 25% of all travel is booked on mobile devices and growing
- b. 25% of hotels will add a mobile application for their customers
- c. 65 million Facebook users access their account on mobile devices

2. Mobile applications will be developed this year. One such application might show restaurants, visitor information centers and close-by attractions near a hotel. Apps will be first designed for the most used platforms and these projects must be completed in tandem with The Paradise Coast's mobile site. Research of The Paradise Coast's in-market visitors will monitor app use, and which platforms are most used.

3. Text messaging now has 50% penetration in the marketplace. We will find ways to use this medium, and capture the mobile phone numbers of The Paradise Coast's customers to feed them information when they are in the destination. Mobile messaging will be integrated into all aspects of the marketing efforts. Specific strategies will be devoted to mobile messaging, texting and applications.
4. QR (Quick Response) tags are growing in use and should be integrated into our messaging.
5. The Paradise Coast's local tourism partners need more consistent communications on what the Bureau is doing, what trends we are seeing in the marketplace and how we are doing in comparison to our competitive set. For 2011, we will develop methods that the CVB can use both in the office and remotely via mobile to compile reports from various sources, articles, and staff members and distribute those to our partner list.
6. Partner Branding Training Program – Potentially apply for educational grant through Edison/Hodges/FGCU (on the Paradise Coast Campus) to train local visitor service staff.
7. Utilize Foursquare Technologies.

## **RESEARCH**

### **Measuring Results (ROI)**

Our overall research product will continue to expand and become more timely and robust.

- a. Periodic reports on the direct, indirect and induced impact to our community from our tourism partners, in addition to our visitors.
- b. We will need to calculate the tax contribution per lodging unit to our local economy.
- c. We will need to know the tax contribution from our infrastructure to the County.
- d. We will need to know the number of jobs in each segment of The Paradise Coast's tourism industry including hotels, restaurants, shopping, etc.
- e. We will need to develop an easy to understand explanation of how economic impact works.
- f. We will need to identify secondary research sources such as DK Shiflett for spending amounts and Global Insights for future booking projections data.
- g. We need to create an easy to use form to record Visitor Information Center visitor statistics, including where they live and what their interests are.

## **DIGITAL MARKETING**

For 2011 we will reallocate marketing funds to keep pace with technology changes and make the Paradise Coast more accessible to its customers.

- a. Mobile enhancements will be our #1 priority in 2011. The Paradise Coast's mobile site must be improved and applications for in-market visitors implemented. We will look at competitors and "best of class" mobile sites as reference in developing.
- b. Video and photo uploads to our website onto our partner's listings must be implemented.



c. Webcams throughout the County must be in a very prominent position on our website home page and continually monitored for proper operation. Consider co-branding existing hotel webcams or purchasing destination cams for full control and “brand” the experience.

d. Customer uploads of photos, two-way blogging and social media contributions will be devised to better communicate to our customers.

e. Mapping capabilities on our website will be enhanced to give our customers the ability to find adjacent attractions, restaurants, shopping, etc.

f. Our international sites will be updated and enhanced to include social media, travel information and more support of our tour operator partners.

g. Enhanced search engine and pay per click improvements will maximize our customer’s ability to find information on the destination.

h. We will begin to track the results of our conversion to the Book Direct/Jack Rabbit booking solution, and maximize the data reported on a monthly basis.

i. We will begin to track social media usage through Google or other services and report monthly.

j. Data lists will be improved:

1. The use of iDSS will be a priority to get our lists cleaned up, and as our primary source for information distribution. Individually maintained lists will not be used in the future.

2. Lists maintained by Phase V will be better catalogued so that we can select well- targeted groups for specific messaging.

k. Media placement will continue to evolve into more digital placements, less print and even more highly targeted cable programming.

L. All incentive programs will go mobile

### **GROUP MEETINGS MARKET**

This market is expected to improve in 2011. However, the likelihood of this segment returning to the levels our destination enjoyed in 2007-2008 is not favorable. We will follow stronger guidelines to continue our DMO support of this important market segment by:

1. Limit tradeshow participation to those that provide the best ROI and partner support.

2. Monthly ROI reports will need to be enhanced and incorporate some of the DMAI standards to share with industry partners and the media

3. Re-launch “Bring Your Meetings Home” program.

4. Develop a “One Tank Meetings” concept for Florida-based corporate and association meetings.

5. Launch the Group Attendance Push program (GAP).

## **SPORTS MARKETING**

We continue to achieve great success in this segment. Our sports marketing team has worked hard with our partners to identify new event opportunities.

1. We will become more selective on the events we attract and concentrate even more on off-season and shoulder season events.
2. We will decide what events we are best at hosting and concentrate on getting more of those event organizers to choose our destination.
3. We plan to seek out second and third tier types of events that fit our sports and meeting or event venues, both indoors and outdoors.
4. We must continue to seek out regional partnerships for trade show participation.
5. We must seek to host a regional National Association of Sports Commissions or Florida Sports Foundation meeting.

## **ARTS & CULTURE**

This growing market segment has maxed out the CVB's small tourism staff. We need private sector assistance from supporters of this segment to sustain and grow its future potential. There are many activities that we could encourage.

1. Find more ways to distribute this information digitally. The digital guides have achieved success, and solutions will be found to increase their flexibility to update items such as expanded listings and new features.
2. The printed Arts & Culture guides are very expensive to produce and in the past have not received partner financial support. We may consider reprinting it only with financial assistance from Visit Florida grants or partner support.
3. We will seek the support of the Cultural Committee with more events and activities.
4. We will continue to work on identifying a group transportation partner to offer organized tours of our museums and art galleries.
5. We will work with United Arts Council to increase the distribution of their printed Calendar of Events and build an enhanced digital version for wider distribution.

## **AIR SERVICE MARKETING**

Cooperation and support of Naples and S.W. Florida International is important as we continue to seek new visitors. We will collaborate with these important partners in an effort to attract new domestic and international flights.









NAPLES, MARCO ISLAND AND THE EVERGLADES  
2010/2011 Advertising Overview (Fund 184)

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\$3.2 M Plan

Media	Description	2011 Projected	O	N	D	J	F	M	A	M	J	J	A	S
<b>INTERNATIONAL</b>														
<b>United Kingdom</b>														
<b>VISITFLORIDA INTERNATIONAL</b>														
Trade	Consumer/Trade Package B	Print, Online, eNewsletters	-----											
	Selling Long Haul (UK) - Trade	1/2 Page 4/C												
	Travel Trade Gazette	Print 1/2 Page 4/C												
Tour Operators	Tour Operator Co-Op Advertising/Promotion	TBD	-----											
<b>North America (Canada)</b>														
	Canadian Television (Weather Channel) - Consumer	:15/:15 & :10's												
	Canadian Weather - Consumer	:15 Pre-Roll & Medium Rectangle												
	North America - Canada - The Weather Channel	Facebook/Twitter Promotion												
<b>Germany</b>														
<b>VISITFLORIDA INTERNATIONAL</b>														
	Consumer/Trade Package B	Print, Online, eNewsletters	-----											
	- FVW	Online & Print												
	- FTI - B2B Online	Newsletter & Micro site												
Tour Operators	Tour Operator Co-Op Advertising/Promotion	TBD	-----											
<b>South America</b>														
Tour Operators/Travel Agents	Investigate and Determine Media Support	Print and Online												
<b>TOTAL INTERNATIONAL</b>			<b>\$124,300</b>											
<b>AIRLINE PARTNERSHIPS</b>														
To Be Determined	Investigate and Determine Media Support	Online, Microsites, Print	-----											
<b>TOTAL AIRLINE PARTNERSHIPS</b>			<b>\$70,000</b>											

<b>NET MEDIA SUBTOTAL:</b>	<b>\$2,471,250</b>
<b>APPROX. COMMISSION OVER \$2.0 M SUBTOTAL:</b>	<b>\$153,750</b>
<b>PRODUCTION:</b>	<b>\$400,000</b>
<b>ADDITIONAL USES OF INCREMENTAL FY'11 FUNDS:</b>	
Visitor Center Coordinator Position	\$50,000
Additional FAMs/Sponsorships	\$25,000
Additional Public Relations	\$25,000
Web Site Enhancements	\$50,000
Enhanced Research - Research Data Inc.	\$25,000
<b>ADDITIONAL USES OF NEW FUNDS TOTAL</b>	<b>\$175,000</b>

FUND 184 "Marketing & Advertising" TOTAL FY'11 SPEND:

**\$3,200,000**



# 2011 Strategic Marketing Plan

November 22, 2010

Tourist Development Council Meeting



# 2011 Strategic Plan

## Updated Marketing Objectives

- Increase brand awareness by 10%
- Increase “Signals of Intent to Travel” by 5%
- Grow ROI (Return on Investment) from \$20 for each marketing dollar invested to \$22
- Grow annual visitation by 2%
- Grow annual average occupancy above 62%
- Increase annual tourist tax revenues by 3%
- Increase destination editorial coverage by 2%
- Build demand to positively influence monthly ADR (Average Daily Rate) levels



# 2011 Strategic Plan

## Tax Collections by Year (Fiscal 2000-2010)

Year	Fiscal Year Resort Tax Collections	% Change
1999/2000	\$8,704,280	
2000/2001	\$9,054,164	<b>+4.0%</b>
2001/2002	\$8,248,489	<b>-8.9%</b>
2002/2003	\$8,439,538	<b>+2.3%</b>
2003/2004	\$9,754,518	<b>+15.6%</b>
2004/2005	\$10,448,222	<b>+7.1%</b>
2005/2006 *	\$13,733,038	<b>+31.4%</b>
2006/2007	\$14,317,868	<b>+4.3%</b>
2007/2008	\$14,669,912	<b>+2.5%</b>
2008/2009	\$12,390,216	<b>-15.5%</b>
2009/2010	\$12,856,631	<b>+4.14%</b>

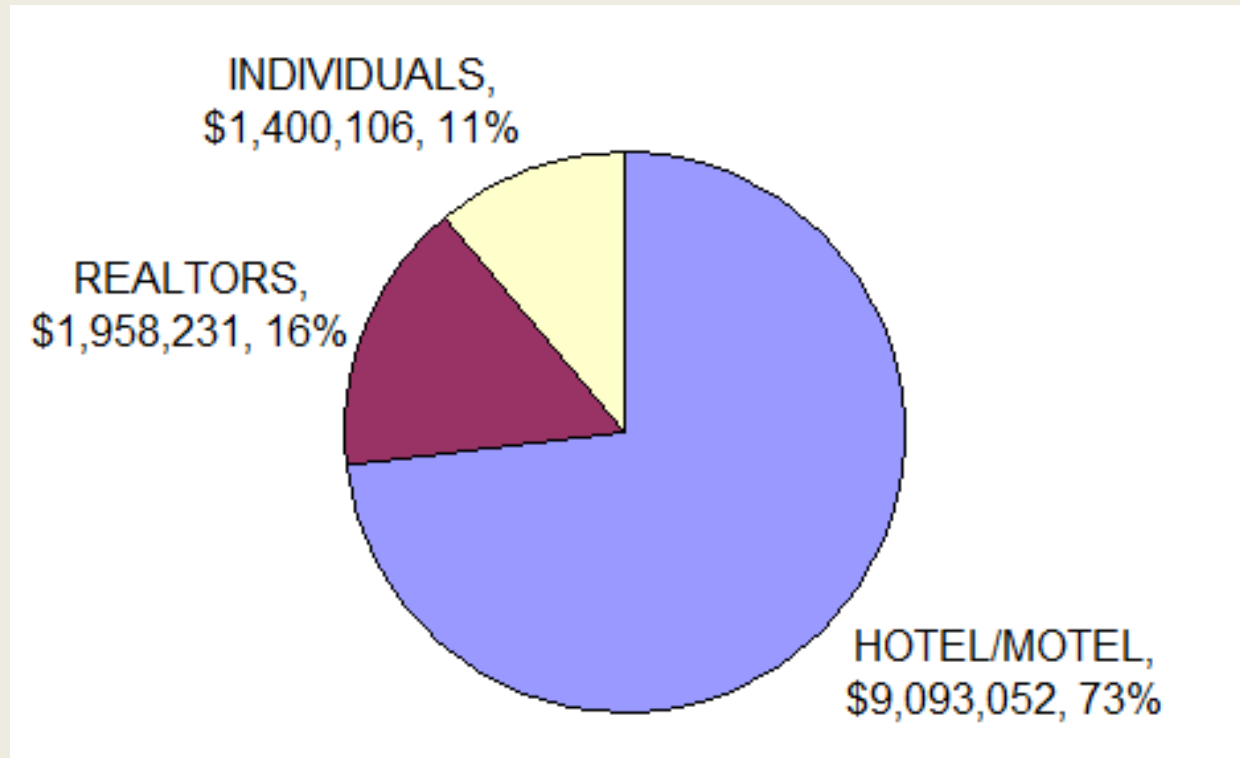
**\* Changed from 3% to 4% resort tax collection rate**

# 2011 Marketing Plan

## Tourist Tax Collections Breakdown

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September 2010 Tax Collections Report (YTD Fiscal 2009/2010)



# 2011 Marketing Budget

**\$3.2 Million (Reallocation Approved for FY 11-1 year)**

x = \$2M Budget x = \$3M Budget	2010	2011		
	Q4	Q1	Q2	Q3
<b>In-State Campaign</b>				
Miami/Ft.Lauderdale	X		XX	X
West Palm Beach			XX	X
Orlando			XX	X
Tampa/St.Petersburg			XX	X
Southwest Florida "Local"				
<b>Northern Campaign</b>				
New York		XX		
Chicago		X		
Philadelphia				
Boston				
Cleveland				
<b>Marketing Enhancements</b>				
Public Relations	X	X	X	X
Web Enhancements	X	X	X	X
Visitor Center Coordinator	X	X	X	X
Research Etc.	X	X	X	X

# 2011 Marketing Plan

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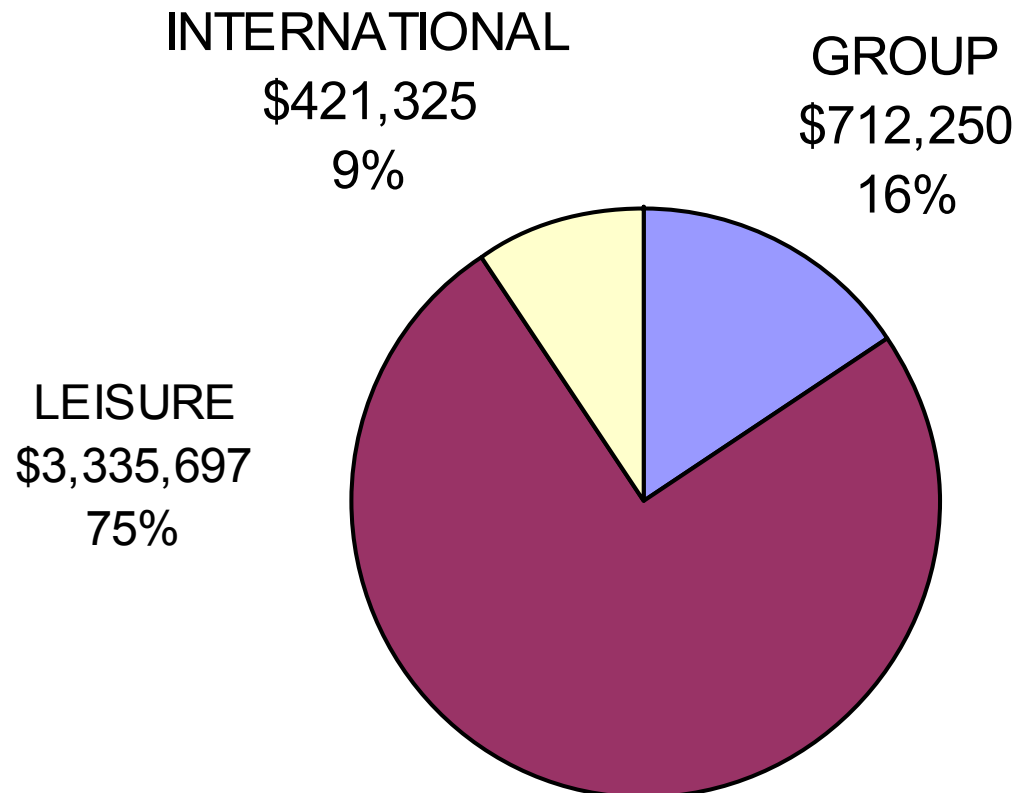
## Group vs. Leisure

- Research indicates on average Leisure vs. Group visitor split is 80% to 20% throughout destination.
- Smith Travel Research indicates that Group business ADR (Average Daily Rate) is lower than Leisure.
  - Per latest STR Report, Year-to-Date Group ADR is \$164.95 vs. \$171.39 for Leisure.
- Research indicates that Group visitors' length of stay is less than that of Leisure visitors.
  - Per Research Data Services, Inc. latest visitation data, Group visitors' length of stay is 70.3% of Leisure visitors.

# 2011 Marketing Plan

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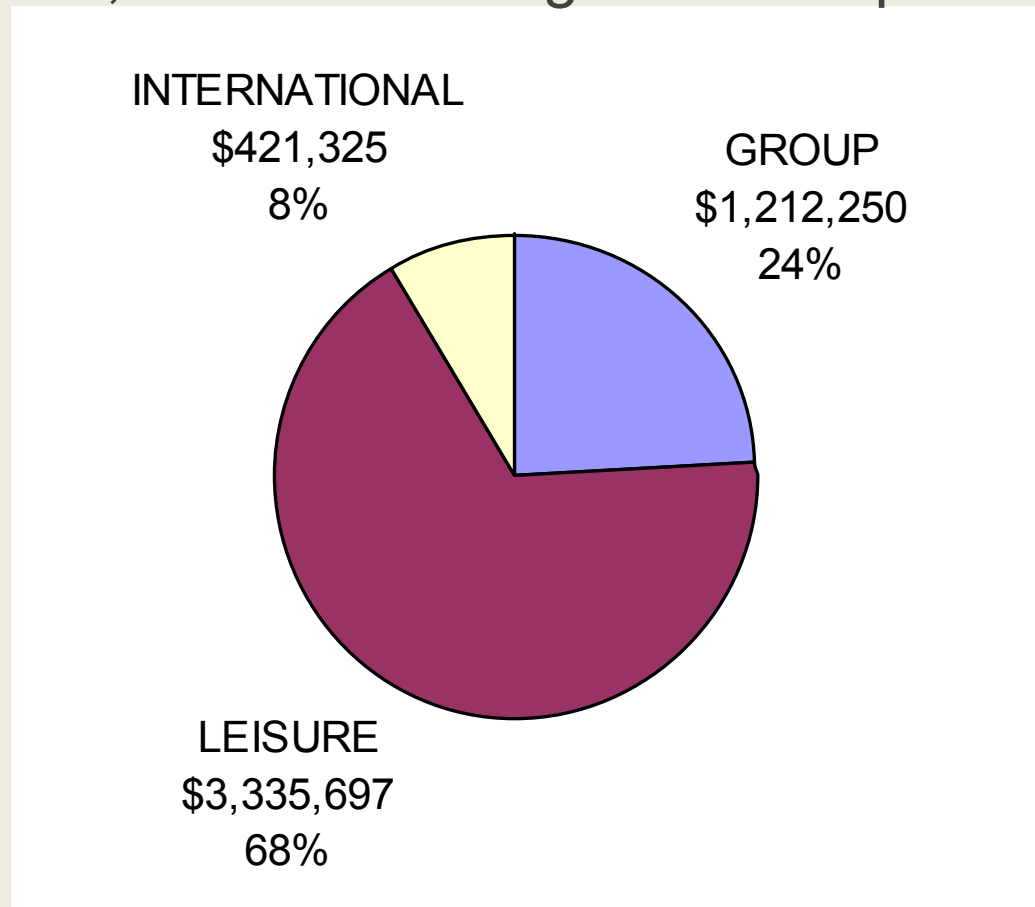
## Market Segments As Percent of Total Marketing Budget



# 2011 Marketing Plan

## Market Segments As Percent of Total Marketing Budget

- If \$500,000 is added against Group Market



# 2011 Marketing Plan

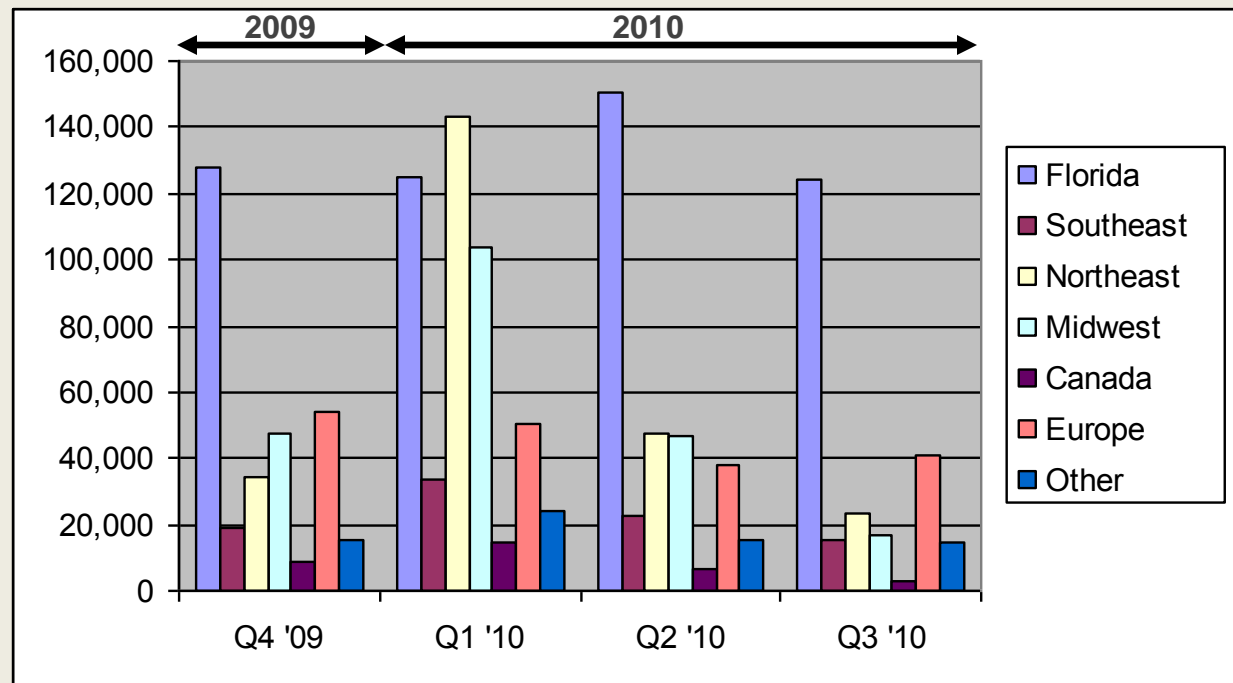
## Leisure Visitation by Market

### Domestic

1. In-state
2. Northeast U.S.
3. Midwest U.S.
4. Southeast U.S.

### International

1. Germany
2. UK
3. Canada



Visitation by Quarter

# 2011 Marketing Plan

## Leisure Target Audiences

### Demographics:

#### Primary

- Adults 35 – 64 years of age
- Skewed towards women
- Household income of \$100 k+
- Combination of family, couples and singles

#### Niche Markets

- Bridal/honeymoon
- Fishing
- Eco/Green
- Arts & Culture
- Heritage
- Senior
- Golf
- Dining



# 2011 Marketing Plan

## Leisure Target Audiences

**Domestic** – Annual program, with emphasis as follows:

- Fall '10 – Southeast FL markets (3% of Total Paid Media Budget)
- Winter – Northern feeder markets (29% of Total Paid Media Budget)
- Spring/Summer – In-state feeder markets (42% of Total Paid Media Budget)
- Possible opportunity Markets - Philadelphia, Boston, Cleveland if additional funding identified

# 2011 Marketing Plan

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## Winter Northern Campaign- Leisure

### Markets:

- New York and Chicago
- National exposure via VISIT FLORIDA Weather Channel Partnership

**Timing:** January – March

### Channels:

- Online
- Spot/Cable Television
- E-blasts
- Commuter Transit in NYC
- Digital/Social
- PR & Promotion

**Paid Media Budget: \$720,000 (29% of Total)**

# 2011 Marketing Plan

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## In-State Spring/Summer Campaign- Leisure

### Market Emphasis:

- Miami/Ft. Lauderdale
- Orlando
- West Palm
- Tampa/St. Petersburg

**Timing:** April - August

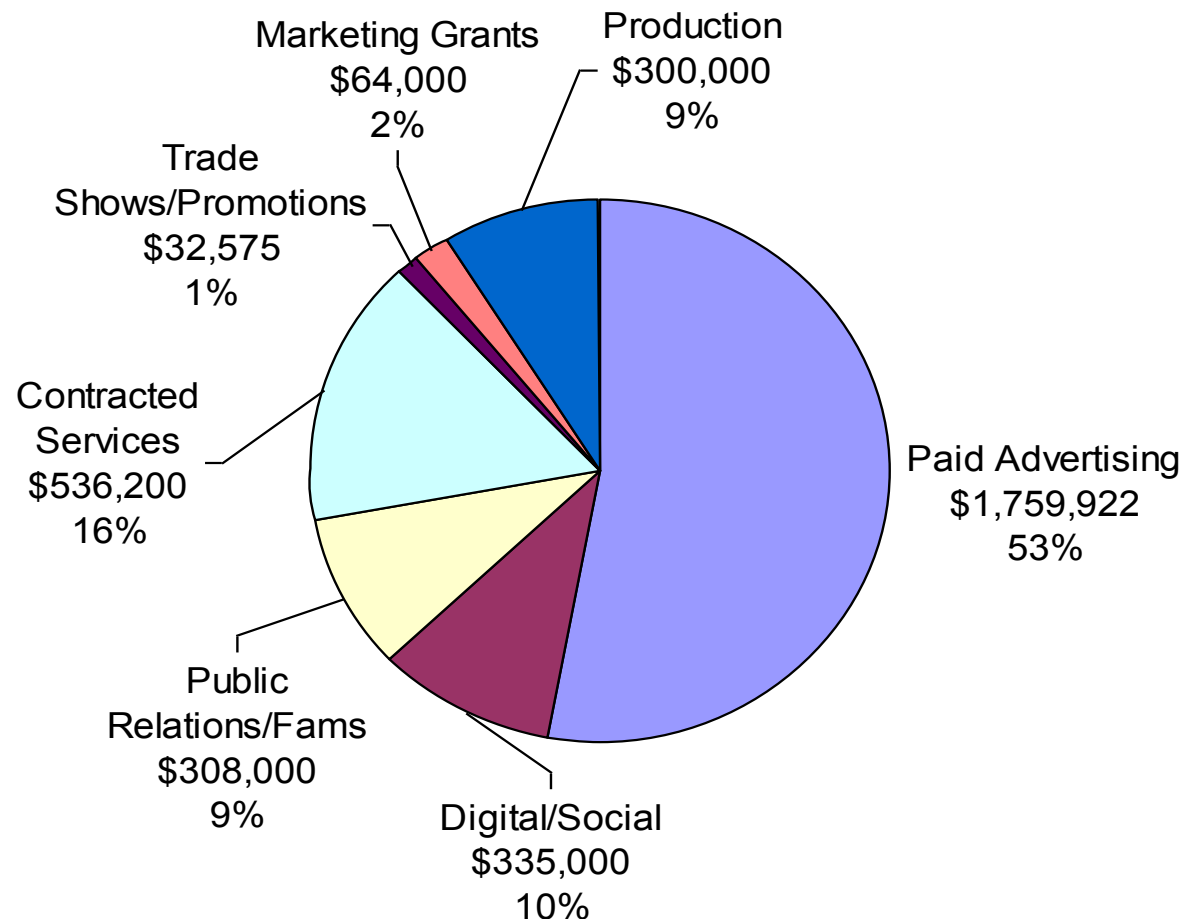
### Channels:

- Online
- Digital/Social
- Spot/Cable Television
- Print
- E-blasts
- PR & Promotion

**Paid Media Budget: \$1,050,000 (42% of Total)**

# 2011 Marketing Plan

## Leisure Marketing Allocations



# 2011 Marketing Plan

## Group /Sports Market Overview

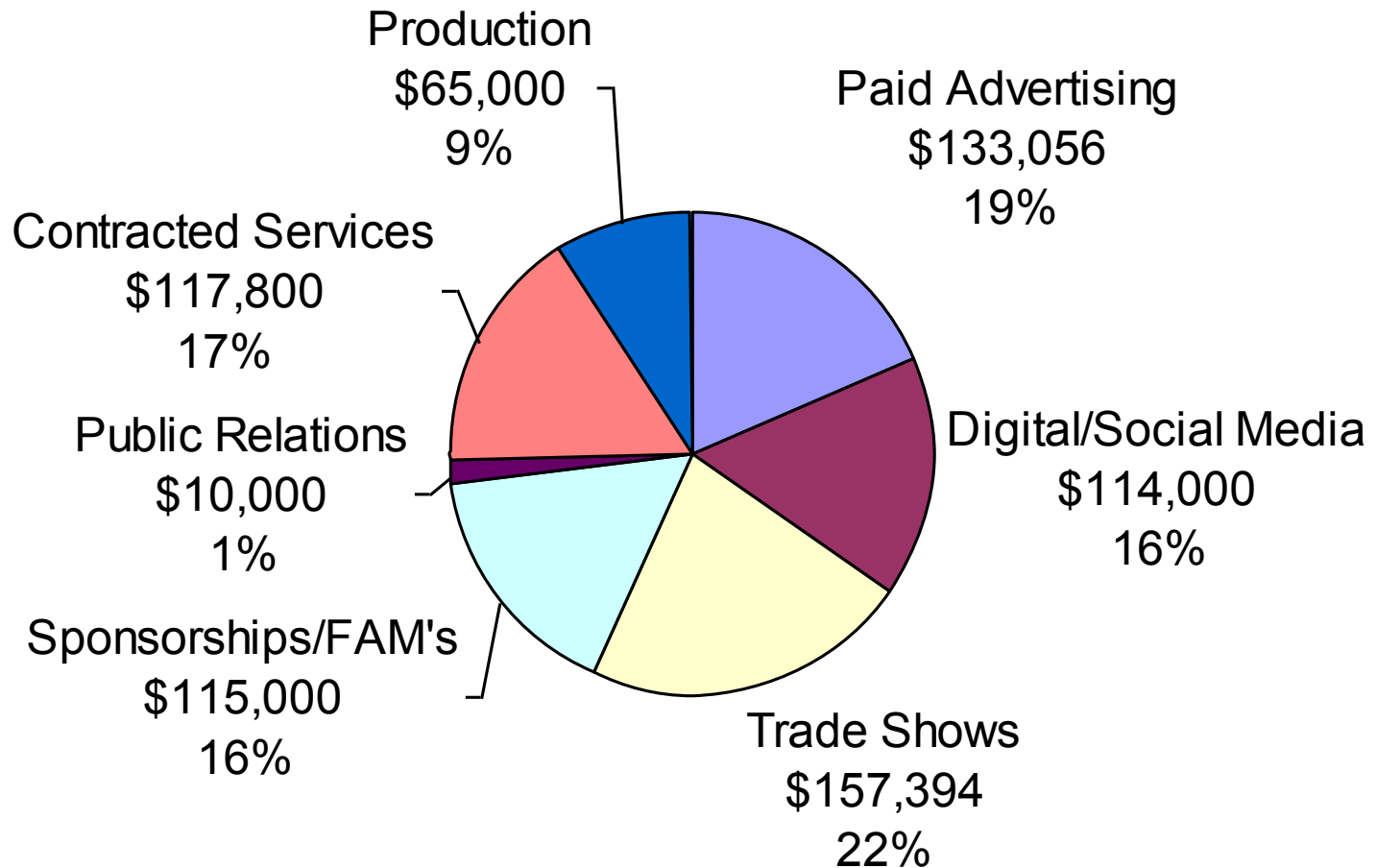
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1. Corporate Meetings
2. In-state Associations Meetings
3. Out-of-State Associations Meetings
4. Medical Meetings
5. SMERF Meetings (Social, Mmilitary, Education, Religious Fraternal)
6. Sports Groups and Events

**Paid Media Budget: \$168,053 (7% of Total)**

# 2011 Marketing Plan

## Group/Sports Marketing Allocations



# 2011 Marketing Plan

## International Target Audiences

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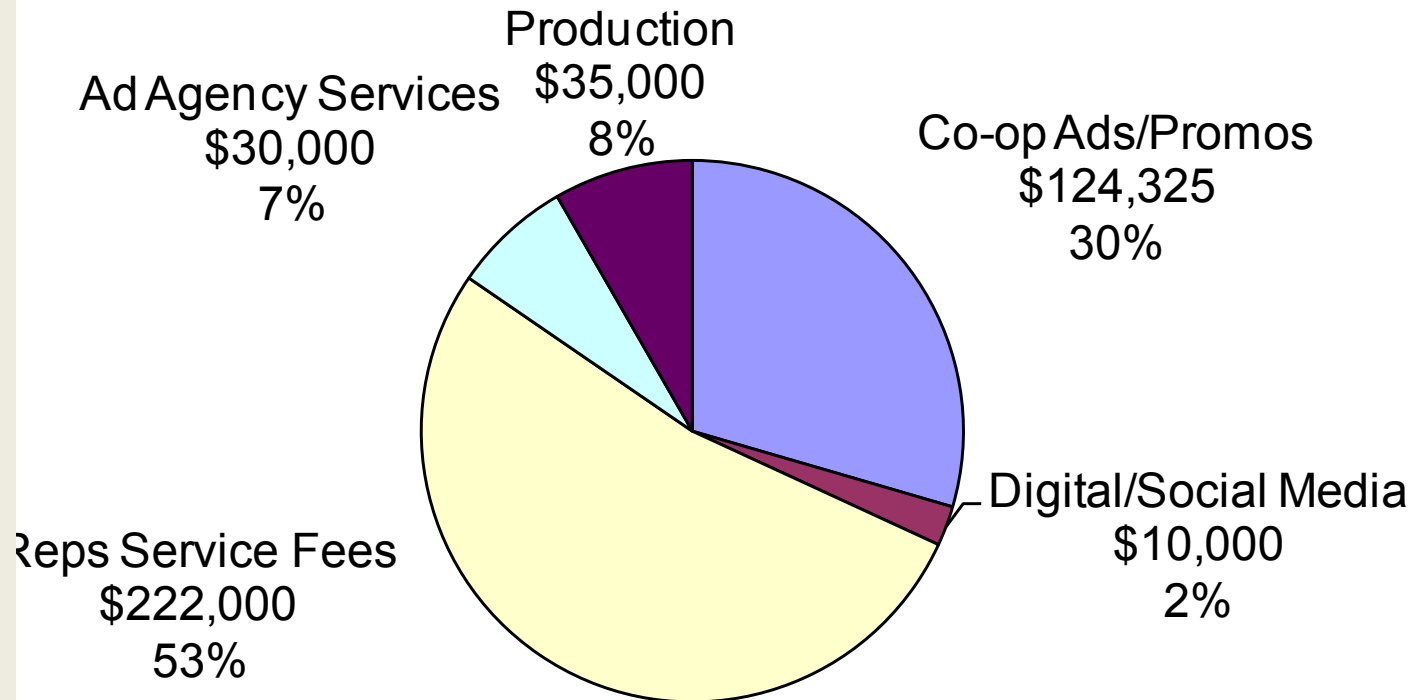
**International** – Placed Oct-Nov and Jan-Feb (5% of Total Paid Media Budget)

- Europe, UK/Ireland
- Opportunity Markets: Brazil, Scandinavia
- Tour Operator Co-ops year-round

# 2011 Marketing Plan

## International Marketing Allocations

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# 2011 Marketing Plan

## New Initiatives

### Quick Response (QR) Tags

Acts as a mobile “bar code.”

- User scans tag with mobile phone
- User is directed to website with special offer.
- App Download instructions

Benefits include:

- Communicates with mobile device users on their time
- Ability to capture user data
- Highly trackable



Have your own  
shootout.

Shoot this tag with your smartphone (free tag reader app at <http://gettag.mobi>) or visit us online to enjoy \$1,000's in savings on dining, shopping and entertainment during your stay. Also find incredible golf packages and other hotel deals for a return visit. So take a shot and get ready to enjoy Florida's best greens for less green.

Discover Florida's Last Paradise™  
[www.ParadiseCoast.com/Golf](http://www.ParadiseCoast.com/Golf) or 1-800-2-escape

Naples Marco Island  
Everglades  
PARADISE COAST™

# 2011 Marketing Plan

## New Initiatives

November 22, 2010  
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### Expanded Values Program – Paradise Coast Preferred Pass

- ParadiseCoast.com/deals houses dynamic partner offers
- Open to hotels, attractions, restaurants, retailers, etc.
- Values Card, incorporating QR tag, will serve as incentive for leisure and group bookings

**PARADISE COAST Preferred Pass**  
Visitor Values and More

Sunshine and savings you'll really warm up to. Escape the cold on our warm beaches and save on everything under the sun – hotels, spas, golf, eco-tours and more! All of the Preferred Pass deals are right here, offering incredible value for your getaway. Enjoying these deals is easy. [Here's how...](#)

Tell a friend and win a free getaway. [Enter now](#)

*Paradise Priced Perfectly*

Hotels | Entertainment | Dining | Shopping | Spas | Golf | Events | Area Info

Enjoy \$1,000's in Preferred Pass deals for your stay.

From Florida's best hotel deals to great savings on dining, spas, golf and more, the Preferred Pass offers incredible value for your getaway.

Enjoying Preferred Pass deals is simple:

- Book hotel deals directly from this site or call and say you want the Preferred Pass deal.
- Enjoy all other Preferred Pass deals during your stay by showing your Preferred Pass card at the restaurant, shop or attraction.

Get your Preferred Pass card in three easy ways:

- [Print out](#) the card from a computer.

# 2011 Marketing Plan

## New Initiatives

November 22, 2010  
Old Business VII – 1  
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### Expanded Online/Digital Co-op Advertising Opportunities

- Interactive Online Ads
- Digital Guides
- E-blasts



Book now and save with  
*Paradise Priced Perfectly*  
More Getaway Deals Here

**Naples Marco Island Everglades PARADISE COAST**

**Marco Island Marriott Beach Resort**  
Nestled on three miles of pristine white sand beaches, is the perfect island paradise.

**MARCO ISLAND FLORIDA RESORT & SPA**  
Marriott



You'll warm up to these getaway deals, offering savings as wonderful as our pristine beaches and sunny weather. From value-packed packages, to hundreds of dollars in resort credits, to low nightly rates, these are some of the best deals in Florida. [Learn more](#) about the incredible offers for the following hotels and attractions, and many others in Naples, Marco Island and the Everglades.



**Marco Island Marriot Beach Resort, Golf Club & Spa**  
Paradise Pays! Receive up to \$100 daily resort credit with the Paradise Pays package. Rates starting at \$504. 800-GET-HERE



**Naples Botanical Garden**  
Experience this extraordinary new garden priced perfectly - \$9.95 (children \$4.95). Children's Garden / Brazilian Garden / Caribbean Garden / Butterfly House / Preserve and Trails. 888-612-1114



**Bellasera Hotel**  
Book now to earn a VISA Card on your next stay! Naples' only luxury hotel offering full home amenities. Studio to three-bedroom suites, Zizi Restaurant, pool, Esterra Spa. 888-612-1115



**Marco Beach Ocean Resort**  
From \$199. Escape to Florida for the Perfect Beach Getaway. Overlooking the Gulf of Mexico, Marco Beach Ocean Resort offers 98 newly renovated one- and two- bedroom suites with a kitchen. 800-715-8517



**Park Shore Resort**  
Book now to earn a VISA Card on your next stay! A tropical oasis in a quiet neighborhood, 1-2 bedroom suites. 800-548-2077

# DISCUSSION OR QUESTIONS

