



## ORGANIZATIONAL HIGHLIGHTS

**May 15, 2009**

### **Organizational Highlights – First Quarter 2009**

In the first quarter, we have seen our destination's occupancy and visitation decline year over year due to the economic climate, but I would like to put it in perspective. In early 2008, Orlando was still seeing increases in occupancy, average daily rate and Tourist Development Tax while the rest of the country had already begun to experience a downturn. Thus, we are now comparing against a strong first quarter 2008 performance. We are still the number one destination in the world for families, a top meeting destination in the U.S. and we are positioning the destination for future growth when the economy rebounds.

Everyone in the United States and abroad needs something to smile about, and where in the world do people smile more than in Orlando. Our new campaign "Orlando Makes Me Smile" provides the positive imagery that many people are seeking. In 2009, the strategy has changed to stronger retail messaging while keeping a strong brand presence. And that's why we included it with our "Bundles of Free Smiles" promotion. More than 135 valuable offers from hotels, restaurants and attractions are available to travelers just by downloading a Smile Card from our Web site. So far our traffic to VisitOrlando.com has increased significantly year over year and more than 20,000 Smile Cards have been downloaded since the beginning of the year. With our international markets still showing promise, the Orlando/Orange County CVB has executed consumer-directed campaigns in the United Kingdom, Ireland, Germany, Canada and for the first time, Brazil.

As I've said in the past, businesses are cutting expenses and travel due to the economy and this has affected the number of corporate meetings booked in the first quarter. We continue to see booking activity with the larger city-wide association meetings and expect that to continue for future years. However, we have seen our selling efforts hampered by the negative media rhetoric on the value of meetings and incentive programs. We've engaged in the U.S. Travel Association's Meetings Mean Business initiative. The goal of the program is to educate elected officials and businesses that legitimate business meetings are not only an important business function, but part of what will help in the economic recovery of the nation. I have personally spoken about Meetings Mean Business to the media and community groups, and intend on keeping the momentum going as we change the debate on how meetings are perceived. Orlando is a top meetings destination in the United States and we must do everything we can to ensure we protect and grow this important travel segment.

Our meetings and convention sales team has recently signed an agreement with the UCF Rosen School of Hospitality Management to survey 18,000 meeting planners. We expect that we will identify 1,800 new leads to pursue for future opportunities for meetings to be held in this destination.

The remainder of 2009 will continue to present challenges, but I assure you that the Orlando/Orange County CVB team is working hard to ensure Orlando receives a disproportionate share of leisure and business travel. We are committed to our industry and this community to keep our destination strong.

Warmest regards,

Gary C. Sain  
President & CEO

### Orlando CVB Activities

Meetings & Conventions

Domestic & Canadian Marketing

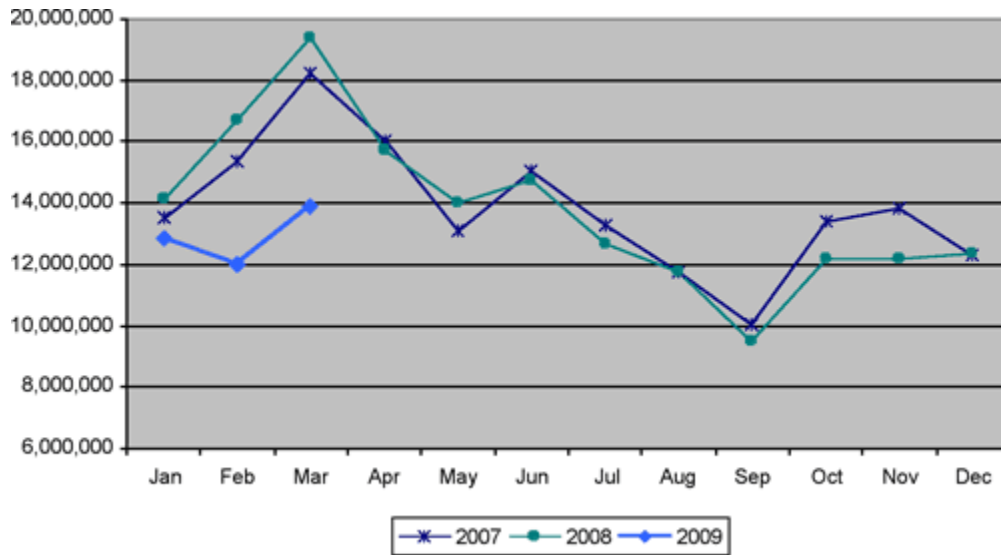
Publicity

International Marketing

Community Relations/Public Affairs

## INDUSTRY PERFORMANCE

### Orange County Tourist Development Tax Collections

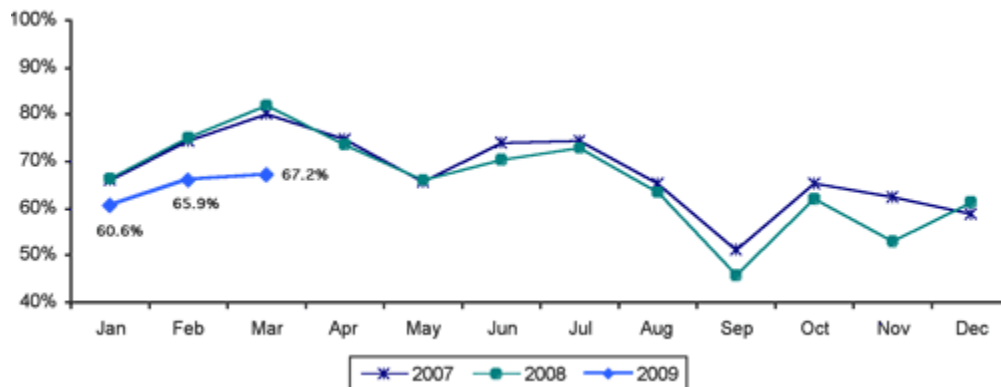


### Metro Orlando Lodging Indicators

The following results are based on the official January through March results released by Smith Travel Research. Please note that Smith Travel Research information does not include Disney-owned and operated hotels, nor does it include the short-term rental of alternative accommodations such as timeshares, condos and vacation homes.

For more information, including data by region, and for the convention/leisure segments, you may view the most recent monthly results [HERE](#). You may also view the latest weekly results [HERE](#).

### Metro Orlando Occupancy Rate



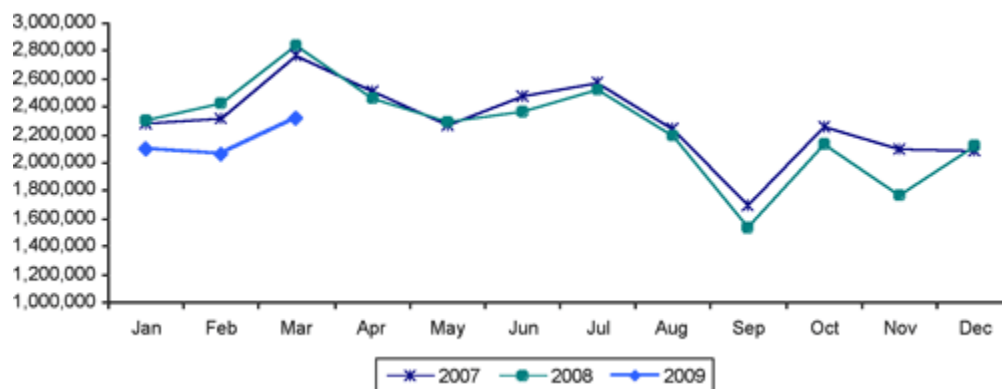
Occupancy

Jan-March	Q1 Results			Year-to-Date Results		
	2009	2008	Variance	2009	2008	Variance
Metro Orlando	64.5%	74.2%	-13.1%	64.5%	74.2%	-13.1%
National	51.4%	57.7%	-10.9%	51.4%	57.7%	-10.9%
Florida	62.9%	70.4%	-10.7%	62.9%	70.4%	-10.7%

#### Average Daily Rate

Jan-March	Q1 Results			Year-to-Date Results		
	2009	2008	Variance	2009	2008	Variance
Metro Orlando	\$106.96	\$121.36	-11.9%	\$106.96	\$121.36	-11.9%
National	\$100.13	\$108.46	-7.7%	\$100.13	\$108.46	-7.7%
Florida	\$124.18	\$140.33	-11.5%	\$124.18	\$140.33	-11.5%

#### Metro Orlando Room Night Demand



#### Room-Night Supply & Demand (in thousands)

Jan-March	Q1 Results			Year-to-Date Results		
	2009	2008	Variance	2009	2008	Variance
Supply <sup>1</sup>	10,026	10,155	-1.3%	10,026	10,155	-1.3%
Demand <sup>2</sup>	6,469	7,539	-14.2%	6,469	7,539	-14.2%

<sup>1</sup> Room-night supply: Computed each month by taking the number of hotel/motel rooms multiplied by number of days in the month

<sup>2</sup> Room-night demand: Computed each month by taking the room-night supply multiplied by occupancy rate

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## ORLANDO CVB ACTIVITIES

### MEETINGS & CONVENTIONS

During the first quarter the Convention Sales team engaged in an aggressive direct sales effort in pursuing business for Orlando. Our team has made close to 200 personal "connections" over the past quarter. The team conducted a familiarization tour which also included the Arnold Palmer Invitational. In addition, the city-wide team hosted several clients during this weekend as well. The focus of the in-house team shifted and redirected their efforts on defined vertical markets – medical, technology, MICE, etc. – that show the greatest promise.

The telemarketing project with the Rosen School of Hospitality/UCF and the Orlando/Orange County CVB started operations on April 2. There are 20 students and two supervisors involved in the project. So far, we are pleased with the results, and are seeing hard leads, prospects, as well as extensive database updates from their efforts. The two teams are working closely to ensure the proper momentum is maintained, and that the expected results continue to be achieved.

**Convention Sales Performance**

The economic slowdown and its effect on the meetings industry have had a negative effect on the team’s lead and definite production. This is especially evident with team members who pursue in-house (individual hotel meetings), shorter term, group business. The city-wide (multiple hotel housing) team continues to see positive lead production; however, they have been challenged with securing signed definite contracts, thus impacting our definite attendance numbers. This will start to improve as meeting planners feel more confident about the economic recovery.

Jan-March		Comparison to Goal		Comparison to Prior year	
	Q1 2009	Q1 Goal	Variance	Q1 2008	Variance
<b>Leads</b>	579	787	-26%	862	-33%
<b>Definites</b>	231	n/a	n/a	366	-37%
<b>Definite Attendance</b>	199,927	439,902	-55%	517,203	-61%
<b>Definite Room Nights Estimated<sup>1</sup></b>	439,839	967,784	-55%	1,137,847	-61%
<b>Definite Room Nights Requested<sup>2</sup></b>	304,022	552,353	-45%	536,978	-43%

<sup>1</sup> Definite Room Nights Estimated = Definite Attendance multiplied by average length of stay (2.2 nights)

<sup>2</sup> Definite Room Nights Requested = Room blocks actually requested by meeting planners

**Convention Marketing Update**

A series of e-blasts, e-newsletter sponsorships and print advertising promoted the Orlando/Orange County CVB’s 25th anniversary campaign to meeting professionals. As of the end of March, 32 new meeting RFPs were received, 20 of which were eligible to be sent out as new leads.

The *Creative Meeting Professional Guide* is in production, with a section of first-time editorial content focusing on infrastructure and activity supporting Orlando’s growth in medical meetings. Some 22,000 copies will be mailed out at the end of May; additional issues are distributed at key meetings industry trade shows throughout the year.

The new collateral piece for use at trade shows and on sales calls is nearing completion. The piece is tagged “New Features” and provides an overview for meeting professionals of new hotels, dining, nightlife, shopping and transportation.

**Events**

Tradeshows/Missions/FAMS	Date	No. of Attendees / Participants	Leads Generated / Peak Rooms / Total Room Nights
Professional Convention Management Association (PCMA)	Jan. 11-14	3,200	This is a client relationship event, generally we do not receive leads for this.
Religious Conference Management Association (RCMA)	Jan. 27-30	1,200	19 / 2,000 / 24,613
Meeting Professionals International - Professional Education Conference (MPI-PEC)	Feb. 7-10	400	2 / 1,750 / 5,780
National Capital Chapter-SGMP (NATCAP)	Feb. 11	200	No leads generated from this show, not attending again next year.
Tallahassee Client Appreciation	Feb. 19	116	5 / 94 / 920

Northern California Chapter of MPI (NCCMPI)	Feb. 24	450	1 / 12 / 53
International Confex	Feb. 24-26	11,143	10 / 1,080 / 5,000
Sacramento & San Francisco Joint SGMP Educational Conference	Feb. 26	200	No leads generated from this show, not attending again next year.
Destination Marketing Association	Feb. 26	1,600	8 / 540 / 2,152
Meeting Planners Expo	Mar. 3	126	4 / 35 / 410
Mid-America Conference MPI	Mar. 8-10	195	No leads generated from this show, not attending again next year.
DC Sales Mission	Mar. 18-19	80	1 / 16 / 32
MPI Dallas/Ft Worth Supplier Showcase	Mar. 26-29	300	3 / 255 / 1,200
March FAM	Mar. 26-28	15	4 / 450 / 6,016
Arnold Palmer Invitational	Mar. 26-28	28	1 lead generated for Sept. 2014, 2018 & 2019 / 3,500 peak rooms / 17,850 room nights

Number of Meeting Client Site Visits Jan. 1 - Mar. 31	65
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## DOMESTIC & CANADIAN MARKETING

### **Domestic Marketing Campaign**

Our new "Orlando Makes Me Smile" campaign launched in first quarter with key events including a digital board in Times Square, a board in Boston Commons on New Year's Eve and a commercial and program content running in the Orlando Citrus Parade show across 150 U.S. markets. A major part of the advertising in the first quarter consisted of a partnership with Google which included keyword advertising, online display advertising and advertising within YouTube that drove people to our new YouTube page. We also had major publicity hits regarding our "Bundles of Free Smiles" on CNN.com, *Wall Street Journal*, and on TV, such as in the national morning show The Daily Buzz, as well as news segments on local affiliates in Chicago, Boston and Washington. There seems to be very good traction and response to the Smile message. Results to date have been good with the Web site receiving a 33% increase in traffic, more than 20,000 smile cards being downloaded to date, and more than 67,000 visits to the main Smile page in first quarter.

### **Canadian Marketing Campaign**

The Canadian winter was met with a significant weight of TV commercials that aired in Toronto, Calgary and Vancouver as part of a continued partnership with iTravel2000. While the spots drove consumers to iTravel2000, the additional brand awareness was an anticipated and desired benefit. Despite fierce competition and a weakening global economy, initial research indicates that bookings during first quarter were strong.

- WestJet airlines reported a growth in first quarter passenger lift and a 20% increase in WestJet vacation bookings
- Thomas Cook's Fun Sun division reported a 38% increase Nov. – March
- Air Canada reported a five to ten percent increase in passengers during first quarter
- SunWing reported an unspecified increase in passenger traffic during first quarter

While much of the Canada campaign's effort was designed to drive web traffic to our online marketing partner, iTravel2000, the Orlando/Orange County CVB Web site still experienced a 5% increase in traffic from Canadian IP addresses in the first quarter.

Also during first quarter, the Orlando/Orange County CVB executed a province-wide promotion in Ontario with the second-largest coffee chain (Country Style Donuts) which prominently featured Orlando as the signature creative and theme as part of a promotion upon six million cups during January and February. As part of the promotion, the Global TV Morning Show sent a representative to Orlando to film and air five individual destination vignette segments that featured each of the parks separately, as well as the ecological and luxury segments. In total the segments accounted for 47 minutes of dedicated destination broadcast exposure.

In addition, the Orlando/Orange County CVB conducted national promotions in all 110 store locations of Black's Photography for a five-week window as well as a four-week promotion with national TV morning show Canada AM.

### **Domestic/Canadian Media Buy**

<b>Advertising Vehicle</b>	<b>Impressions</b>	<b>Description</b>
Online Advertising - Domestic	8,800,000	Google pay per click, display network and YouTube Ads
Canadian TV	12,200,000	TV Co-op with partner – iTravel2000

### **Domestic/Canadian Travel Trade**

#### U.S. Domestic & Canada Leisure Travel Trade Marketing

<b>Tradeshow/Mission/FAM</b>	<b>Date</b>	<b>Location</b>	<b>Audience</b>
SATH, Society for Accessible Travel and Hospitality	Jan. 4-6	Orlando	250 Travel trade professionals including travel agents and suppliers
ABA, American Bus Association	Jan. 7-12	Charlotte, NC	3,100 delegates 650 Buyer delegates
United Motorcoach	Jan. 21-24	Orlando	2,000 Delegates representing 400 motorcoach companies
Travel Women in Golf Society (TWIGS)	Jan. 30 – Feb. 1	Orlando	40 U.S. and Canadian Tour Operators
Florida Huddle	Feb. 1-3	Orlando	250 Domestic, International and Canadian Tour Operators attended
Canada Tour Op. VIP Dinner	Feb. 2	Orlando	10 Top Canadian Tour Operators
AAA/ATI VIP Dinner	Mar. 9	Orlando	22 AAA and CAA Advisory Board

<b>Web Updates</b>	<b>Date</b>	<b>Location</b>	<b>Audience</b>
Bundles of Smiles Offers	Jan. 23	Orlando	Travel Trade

<b>Broadcast E-mail</b>	<b>Date</b>	<b>Location</b>	<b>Audience</b>
Travel Industry Special Values Newsletter – Smile offers	Feb. 17	Orlando	80,000+ Retail and home-based US and Canadian Travel Agents
What's New – Smile Deals	Mar. 18	Orlando	80,000+ Retail and home-based US and Canadian Travel Agents

<b>Brochure Distribution</b>	<b>Date</b>	<b>Location</b>	<b>Audience</b>
Visit Florida – Student Youth Travel Association (SYTA) Annual Summit	Jan. 27-31	Colorado Springs, CO	60 Student Group Tour Operators

### **Web Site**

Sessions, Page Views and Time on Site are all tracking ahead of goal. Search Engine Optimization and Search Engine Marketing have greatly enhanced our results. Pages Viewed per Visit and Pages Viewed

for people visiting more than 1 page are tracking to goal, but down from last year. This is probably due to people being motivated to the Smile pages for travel deals and offers.

Jan-March	Comparison to Goal			Comparison to Prior Year	
	Q1 2009	Q1 Goal	Variance	Q1 2008	Variance
Monthly Unique Visitors	1,117,205	1,100,000	2%	818,567	36%
Total Page Views	6,714,068	6,500,000	3%	5,801,239	16%
Total Visits	1,222,065	1,200,000	2%	924,825	32%
Pages Viewed Per Visit	5.5	5.3	4%	6.3	-13%
Time Per Visit (average minutes)	6.9	6.3	10%	7.7	-10%
Web Site Sessions <sup>1</sup>	1,447,456	1,400,000	3%	1,092,097	33%

<sup>1</sup> Represents hourly unique visitors

### Strategic Alliances (Promotions)

Twenty episodes of Wheel of Fortune, taped at SeaWorld Orlando and featuring vignettes of Pat Sajak and Vanna White at various locations throughout Orlando, spearheaded our first quarter 2009 strategic alliances. Our two other national promotions generated over 20,000 fulfillment kit requests and 19,000 database names. Internationally, we had multiple promotions in the UK and Canada as part of our integrated efforts.

Below are some highlights from our first quarter activity:

Jan-March	Media Value	Market	Form of Media	Circulation	Impressions
<b>Wheel Of Fortune</b> – America’s #1 syndicated TV show broadcast four weeks of shows from Orlando	\$3,200,000	National U.S. / Canada	TV / Online	8,532,000	225,235,000
<b>Bob Evans Foods</b> – National promotion with leading breakfast food company	\$71,000	National U.S.	Print / Online	28,910,000	29,410,000
<b>Francesco Rinaldi Pasta Sauce</b> – National promotion with popular brand	\$175,000	National U.S.	Print / Online	34,685,000	34,761,000
<b>Country Style</b> – Promotion on five million coffee cups in popular Toronto-area restaurant chain	\$782,000	Canada	Print / Radio / Online	5,600,000	15,800,000
<b>TOTALS:</b>	<b>\$4,228,000</b>			<b>77,728,000</b>	<b>305,206,000</b>

Note: Circulation refers to unduplicated reach of the program.

### Visitor Services

Jan-March	Q1 2009	Q1 2008	Variance
Number of Walk-ins (Visitor Center)	22,503	23,113	-3%
Phone Calls Received (Call Center & Visitor Center) <sup>1</sup>	13,648	16,521	-17%
E-mails Processed (Call Center & Visitor Center)	1,188	1,178	1%

<sup>1</sup> The largest decrease was in January (-32% under last year). February and March were also down but not as significantly at 9% & 7.5% respectively.

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## PUBLICITY

The Publicity department enjoyed a strong first quarter of activity and ROI, particularly in the United

States, Canada and Brazil where the “Orlando Makes Me Smile” campaign was launched. In the United States, the campaign was supported with aggressive media relations outreach, two national newswire releases and a broadcast ground tours (producing more than 40 TV hits) featuring Emily Kaufman, The Travel Mom, all promoting the destination’s “Bundles of Free Smiles” value offers. These efforts not only produced coverage with key national media outlets (*Wall Street Journal*, *USA Today.com*, *CNN.com*, *msnbc.com*, *The Daily Buzz*) but in every major target market east of the Mississippi (*Chicago Tribune*, *Philadelphia Inquirer*, *Dallas Morning News*, *Detroit Free Press*, *Houston Chronicle*, *Miami Herald*, *The Tampa Tribune*, *South Florida Sun-Sentinel*, *WGN Chicago* and *WAGA Atlanta*). The placements for the campaign were more than triple the results produced in the first quarter of 2008. In Canada, the campaign was supported with aggressive media relations, two national newswire releases, exposure at a Visit Florida media luncheon and participation in a Canadian travel writers conference (TMAC). In Brazil, the campaign was supported with extensive media relations via a media mission to Sao Paulo, a press trip and a week-long destination feature on one of the top national morning shows in Brazil, *Hoje em Dia*.

Around the world, the department focused on value messaging – Orlando’s affordability and accessibility – and new destination experiences. The message was brought to life via international press trips for media from the U.K., Ireland and France and a media mission in Spain. In addition, 68 media outlets from domestic (25) and international (43) markets were hosted on individual media trips by the Orlando CVB.

	Jan-March		Comparison to Goal		Comparison to Prior Year	
	Q1 2009	Q1 Goal	Variance	Q1 2008	Variance	
<b>Number of Clips</b>	586	444	32%	324	81%	
<b>Circulation<sup>2</sup></b>	344,697,548	426,065,507	-19%	85,360,943	304%	
<b>Value<sup>1</sup></b>	\$13.4M	\$11.4M	18%	\$3.1M	332%	

1 Value is determined by an independent service, based on advertising rates. No multipliers are used in determination of circulation or value.

2 Discrepancy is the result of print media industry challenges - declining newspaper and magazine circulations; and an increase in web media outlets which are still growing their circulations. Positive variance attributed to spring campaign efforts in 2009 which we did not have in 2008.

Jan-March	Q1 2009
Press Tours	Results
France “Behind the Scenes” Jan. 9-14 Orlando, FL	Media participating in the press trip were: <i>Magazine Nous Deux</i> (circ. 211,000); <i>Magazine Media CE</i> (circ. 15,000); <i>Vie Pratique Madame</i> (circ. 334,700); <i>Magazine Vacances Pratiques</i> (circ. 70,000) and <i>Magazine Biba</i> (circ. 254,795).
Worlds of Discovery Press Dinner Jan. 29 Orlando, FL	Set up a dinner at Ocean Prime for Worlds of Discovery press trip for journalists from U.K. and Ireland. This served as an opportunity to share what’s new in the destination outside of the SeaWorld parks. The following journalists were in attendance: <i>Express &amp; Star</i> (circ. 46,843); <i>Liverpool Echo</i> (circ. 129,681); <i>Irish Daily Mirror</i> (circ. 84,104); <i>Irish News of the World</i> (circ. 155,762) and <i>Irish Sunday Tribune</i> (circ. 70,058).
Orlando É So Alegria Feb. 9-13 Orlando, FL	The press trip highlighted a great combination of Orlando’s newest offers, attractions, unexpected options, with paramount shopping choices of the destination. The press trip also showcased Orlando’s most recent value offers. The media group included: <i>Correio Braziliense</i> newspaper (circ. 200,000); <i>Zero Hora</i> newspaper (circ. 187,000) and <i>Proxima Viagem</i> magazine (circ. 75,000).
Orlando É So Alegria Broadcast Mar. 1-9 Orlando, FL	<i>Hoje em Dia</i> is a live, three and a half hour morning program broadcasted by <i>Rede Record</i> with viewers in Brazil and 135 other countries. In São Paulo, the program has an audience of two million viewers. In Brazil, the audience is composed by 30 million viewers. A total of five crew members participated in the trip. The press trip highlighted many of Orlando’s adventure options while also showcasing the unexpected side of the destination.
Ireland “All Elements”	Invited six Irish journalists to Orlando. Our ultimate goal was to present

Mar. 10-15 Orlando, FL	Orlando to the Irish public as a fun-filled destination for all ages with great values and unlimited entertainment and shopping options. The journalists all write for Dublin-based publications with national readership throughout the Republic of Ireland and Northern Ireland: <i>The Sunday World</i> (circ. 274,143); <i>News of the World</i> (circ. 155,762); <i>The Irish Daily Mail</i> (circ. 123,919); <i>Irish Times</i> (circ. 116,102); <i>Evening Herald</i> (circ. 82,854).
Travel City Direct, Mar. 12-14 Orlando, FL	Travel City Direct (TCD) planned a press trip with Disney to highlight their offerings to this market. A total of five publications participated in the press trip including: <i>Daily Mirror</i> (circ. 1.4 million); <i>Daily Star</i> (circ. 725,671); <i>Travel Mail</i> (640,000 impressions); <i>Reveal</i> (circ. 270,014) and <i>Express &amp; Star</i> (circ. 140,000).
<b>PR Tradeshow/ Mission/Events</b>	<b>Results</b>
Institute for Travel Writing & Photography Reception Jan. 9 Orlando, FL	Handled entire event including venue arrangement, press kit distribution, banner design, Orlando/Orange County CVB staff attendance and guest speaker invitations as well as attended the weekend workshops. The event had 31 attendees.
Toronto Mission/Visit Florida Media Luncheon Jan. 21-23 Toronto, Canada	The event attracted more than 50 journalists from the Greater Toronto region. In addition to the event, media calls were conducted with TripAtlas.com (51,318 page views per month) and CAA (circ. 1,594,215). As a result of the mission, coverage appeared in <i>Toronto Sun</i> (circ. 249,000); <i>torontosun.com</i> (82,286 page views per month); <i>travelhotnews.com</i> (3,362 page views per month); <i>openjaw.com</i> (867 page views per month); <i>tripatlas.com</i> (51,318 page views per month) and <i>travelindustrytoday.com</i> (27,125 page views per month).
Spain Media Mission/FITUR Jan. 24 – Feb. 3 Barcelona and Madrid, Spain	During the mission, the Public Relations department conducted a total of 55 media appointments with both print and broadcast media, including: <i>La Voz de Galicia</i> (circ. 103,828); Neo Turismo; Agencia EFE – Equivalent to AP, reaching millions of people around the world; <i>20 Minutos</i> (circ. 947,571); <i>El Periodista Digital</i> (215,000 unique visitors); <i>Vintur</i> (circ. 6,500); Onda Rambla/Punto Radio; Radio Kanal Barcelona; <i>Zero</i> (circ. 25,897); <i>Universal Iberia</i> (circ. 300,000); Europa Press – Equivalent to AP; <i>Oxígeno</i> (circ. 300,000); <i>Evasión</i> (circ. 25,000); <i>Conexo</i> (circ. 30,000); <i>Metro</i> (circ. 1,000,000); <i>El Periódico de Catalunya</i> (circ. 350,000); TV 3; <i>Epicur</i> (circ. 30,000); <i>Ediciones Grandes Viajes T&amp;A</i> (circ. 50,000); C.O.P.E Radio (1,848,000 listeners); <i>Onda Cero – Gente Viajera</i> (3,000,000 listeners); <i>QTravel</i> (circ. 30,000); <i>Costa Rica Traveler</i> (circ. 10,000); Viajar TV (6,000,000 viewers); Grupo Boletín Turístico (Mexico): 25 TV; <i>Más Viajes</i> (circ. 35,000); <i>Travel Times</i> ; <i>Travel Port</i> ; <i>Viajar Magazine</i> (circ. 180,000); <i>Ladevi Ediciones</i> (circ. 12,000); <i>Rutas del Mundo Travel Magazine</i> (circ. 150,000); <i>Lady Golf</i> (circ. 24,000); <i>Revista RFE Golf</i> (cir. 100,000); RFGgolf.com (108,000 visitors per month); <i>Mi Revista de Golf</i> (circ. 19,000); Radio Nacional Espana RNE; <i>Metro newspaper</i> (circ. 1,000,000); <i>Woman magazine</i> (circ. 300,000); <i>Onda Cero – Gente Viajera</i> (3,000,000 listeners); <i>Gente Magazine</i> (circ. 1,000,000); Onda Rambla Radio (audience 500,000); <i>Latino Newspaper</i> (circ. 500,000); <i>Lecturas Magazine</i> (circ. 400,000); ETB Television (220,000 viewers); <i>RPM Revista de Prensa Multimedia - La Vanguardia</i> (circ. 202,117); <i>El Periódico</i> (circ. 350,000); RTVASA (90,000 viewers); <i>QTravel</i> (circ. 30,000); <i>Universal Iberia newspaper</i> (circ. 300,000); <i>Revista Internacional Viajes</i> ; Cadena Ser (4,435,000 listeners); Ona Catalana (45,000 listeners); <i>Editur</i> ; <i>Grupo Boletín Turístico (Mexico)</i> .
Florida Huddle Feb. 1-3 Orlando, FL	The cornerstone of the Orlando/Orange County CVB's public relations efforts was the press room sponsorship. 34 journalists attended the panel press conference including: <i>Accent on Tampa Bay</i> (circ. 40,000 USA); <i>Aqui Miami</i> (circ. 30,000 Latin America); <i>Canadian Travel Press</i> (circ. 13,112 Canada); <i>Florida Travel + Life</i> (circ. 101,591 USA); <i>Southerntravelnews.com USA</i> ; <i>Talking Travel</i> (circ. 1,500,000 USA); <i>Travel Journal</i> (circ. 5,000 USA); <i>Travel Magazine</i> (circ. 7,000 Belgium); <i>Travel with Kal</i> (circ. 250,000, SA); <i>TravelTalk</i> (circ. 33,450 Germany) and several prominent freelancers. A media breakfast was also held at Pirate's Dinner Adventure on the last day of the convention for those attendees listed above.
TMAC Annual Conference	Participation strengthened relationships with Canadian journalists through social interaction throughout the conference and with 11 media marketplace

Feb. 2-3 Richmond, British Columbia	appointments including: variety of prominent Canadian freelancers; <i>Western Living</i> (circ. 192,350) and <i>London Free Press</i> (circ. 100,395). The event attracted 97 journalists from across the country and 128 industry members. Media results stemming from meetings and conversations from the conference include stories in <i>London Free Press</i> (circ. 192,350); <i>lfpress.com</i> (4,508 visitors per month); <i>Toronto Sun</i> (circ. 249,000) and <i>torontosun.com</i> (82,286 page views per month).
Expo Vacaciones USA 2009 Mar. 2-4 Mexico City, Mexico	A total of 49 media members attended See America Media day. As part of the event, the U.S. Commercial Service qualifies a selected group of media members to be recognized for their editorial work; as a result two out of three winners were articles featuring Orlando. Attending media to the event included: <i>Boletin Turistico</i> (989,980 hits/month); <i>Asesoría Turística</i> (circ. 10,000); <i>Buen Viaje</i> (circ. 20,000); <i>Conexión Turística</i> (circ. 4,500); <i>El Economista</i> (circ. 33,025); <i>El Financiero</i> (circ. 72,000); <i>Grupo GW</i> ; <i>Invertour</i> (circ. 10,000); <i>Medios y Negocios</i> ; <i>Swishy Magazine</i> (circ. 25,000); <i>Reforma Newspaper</i> (circ. 160,000); <i>Travesias</i> (circ. 50,000); <i>Turistampa Gatopardo</i> ; <i>Rojas Producciones</i> ; <i>Trafico Magazine Turístico</i> ; <i>The Billionaire</i> (circ. 22,000) and <i>Grupo BT</i> .
ITB 2009 Mar. 11-15 Berlin, Germany	Orlando/Orange County CVB participated in the U.S. Travel/Visit USA media breakfast where more than 100 international journalists were in attendance, including <i>DPA</i> , GermanPress Agency (circ. up to 4 million readers); <i>Geo Saison</i> travel magazine (circ. 168,600); <i>Deutschland Radio Berlin</i> (circ. 1 million) and many more. Jay Santos, Orlando/Orange County CVB's vice president of international marketing, completed an interview with Metropolitan Berlin TV Station, Spreekanal – Avus TV. The 90-second segment aired eight times, and all totaled, had 4.8 million viewers and a value of \$57,500.
Brazil Mission Mar. 24-29 São Paula and Rio de Janeiro, Brazil	A total of 12 of the most important consumer and trade media outlets in the market were visited to disseminate the Orlando message across the nation. Media Appointments included: <i>Panrotas</i> (circ. 10,000); <i>Folha de São Paulo</i> (circ. 408,000); Radio 89 FM (audience 2.2 million); <i>Pequenas Empresas Grandes Negócios</i> (circ. 78,700); <i>Estado de São Paulo</i> (circ. 345,000); <i>Editora Abril's Viagem &amp; Turismo</i> (circ. 150,000); <i>Editora Abril's Quatro Rodas</i> (circ. 300,000); <i>Próxima Viagem</i> (circ. 75,000); UOL (6.5 million views/month); <i>Viagem e Turismo</i> (circ. 150,000); <i>Folha do Turismo</i> (circ. 80,000); <i>O Globo</i> (circ. 465,000) and <i>O Globo Online</i> (2.45 million page views/week).

Individual Press Trips to Orlando	No. of Journalists	
Jan. 1 - March 31	25	Debert Cook, <i>African-American Golfer's Digest</i> Peter Blais, <i>Boomer Golf News</i> Karl Hagberg, <i>Currents Magazine</i> Kelly Gray, "Everything Family Guide to Budget Travel" Patsy Bell Hobson, Freelance writer Melissa Chapman, Freelance writer Sandra Jackson Opoku, Freelance writer Stephen Morrill, Freelance writer Barbara Nefer, Freelance writer Jason Rich, Freelance writer James Stammer, Freelance writer Kathleen Walls, Freelance writer Adele Woodyard, Freelance writer Sassy Hackett, Global Radio Networks Trish Utter, <i>Good Life Community</i> Kristi Hemingway Weatherall, Kids' Pages Family Media Rosemary Johnson, <i>Ladies Golf Journey</i> Dennis Richardson, Magic Valley Publishing Paul Rubio, "The Out Traveler" Steve Carter, <i>Tifton Gazette</i> Alan Rider, XTRORD.COM Shannon Norwood, WJXT-TV Jacksonville

	Tom Johansmeyer, Gadling.com, Luxist.com and FilmFestivalToday.com Michael Smith, <i>Carolina Forest Chronicle</i> Jennifer Cole, <i>Southern Living</i>
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## INTERNATIONAL MARKETING

### Brazil Campaign

The Orlando/Orange County CVB, in partnership with Walt Disney World, Universal Orlando Resort and Worlds of Discovery, launched the most comprehensive co-op consumer advertising campaign in Brazil in the destination's history. The campaign includes advertising on television and in leading national newspapers and magazines. The campaign is supported by the participation by eight tour operators who are promoting their Orlando packages. A special section of the Portuguese Web site promotes the "Orlando Makes Me Smile/Orlando é só Alegria!" message and is further supported by online advertising. In conjunction with the launch, the Orlando/Orange County CVB hosted journalists from Brazil's top morning show, Hoje em Dia from March 2-9, with a 10-day program to air in April. March total Web site page views were 37,926, up 164% from previous year with over 2,000 click-throughs to tour operator partners.

### Germany Tour Operator Co-op Programs

To extend the Orlando/Orange County CVB's reach to German consumers in a creative and cost-effective way, the Orlando/Orange County CVB has partnered with leading German tour operators during the first quarter of 2009 to execute the following series of co-op programs:

- **Neckermann Travel** - During the second week of January, the Orlando/Orange County CVB joined with the St. Petersburg/Clearwater CVB and Worlds of Discovery to create a window display for 330 travel agencies.
- **FTI Touristik** - In partnership with the St. Petersburg/Clearwater CVB, the Orlando/Orange County CVB ran an online promotion from January 5-March 8, 2009.
- **CANUSA** - The Orlando/Orange County CVB participated in a special Florida insert created by U.S. and Canada specialist tour operator CANUSA. The insert included a two-page Orlando feature that was distributed in the national *Frankfurter Allgemeine Zeitung* with a circulation of 155,000. In addition, Orlando was included in an e-newsletter distributed to 510,000 consumers on February 8.
- **Meier's Weltreisen** - At the beginning of March, the Orlando/Orange County CVB joined with the St. Petersburg/Clearwater CVB for a direct mail to 6,800 of Meier's VIP clients.
- **America Unlimited** - In February the Orlando/Orange County CVB partnered with tour operator America Unlimited, as well as the St. Petersburg/Clearwater CVB and Universal Orlando Resort, for a two-page Orlando feature in an insert in the regional daily newspaper the *Berliner Zeitung* with a circulation of 50,000. This insert was further supported through an e-newsletter to 100,000 consumers.
- **Tom on Tour** - The Orlando/Orange County CVB partnered for the first time with gay tour operator Tom on Tour, to create an Orlando feature.

### U.K./Ireland Campaign

In first quarter, the Orlando/Orange County CVB conducted a major advertising campaign in the United Kingdom and Republic of Ireland. The activities included a 24-page free standing insert that was distributed in two million national newspapers in the U.K. in January, followed by television and online advertising. The television featured calls to action to key tour operator partners to drive the purchase of packaged trips to Orlando. Awareness of Orlando/Orange County CVB television advertising increased 4 percentage points from 39% during the January-February 2008 on-air period to 43% during the January-February 2009 on-air period. Interest in visiting Orlando in the next 12 months increased 3 percentage points from 62% during the winter of 2008 flight to 65% during the winter of 2009 flight. Intention to visit Orlando in the next 12 months increased four percentage points from 20% during the winter of 2008 flight to 24% during the winter of 2009 flight. During the winter of 2009 flight, intention to visit Orlando in the next 12 months was 11 percentage points higher among respondents who recognized Orlando/Orange County CVB advertising (29%) than those respondents who did not recognize Orlando/Orange County CVB advertising (18%).

**International Media Buy**

Advertising Vehicle	Impressions	Description
UK/Ireland Campaign	265,121,000	Television, Free Standing Insert, Online
Brazil Campaign	12,895,000	Newspaper, magazines, online

**International Travel Trade****Global**

Tradeshow/Mission/FAM	Date	Location	Audience
Florida Huddle	Feb. 1-3	Orlando	Orlando played host to approximately 500 international buyers and Florida suppliers; conducted 32 appointments with U.S., Canadian and European tour operators; hosted 12 U.K. tour operator partners to dinner.
TUI Global Meeting	Feb. 4-5	Orlando	Participated in first global meeting of TUI Travel attended by 20 representatives from their European tour operator offices; conducted destination presentation and participated in one-on-one meetings.
Receptive Services Assn of America (RSSA) Annual Summit	Feb. 10-11	New York, NY	Attendance at annual summit attracted 52 representatives from 20 U.S.-based receptive tour operators dealing with global markets. Conference included sessions on industry trends and opportunity to network with these key industry clients.
Receptive Operator Calls/Presentations	Feb. 12-13	New York, NY	In conjunction with RSAA event, conducted sales calls and presentations for six local New York receptive tour operators, reaching a total of 99 clients.

**Latin America/Spain**

Tradeshow/Mission/FAM	Date	Location	Audience
Terra America Events	Jan.18-20	Portugal	Partnered with Terra America to host events for local travel agents in Lisbon and Porto, Portugal; 185 attendees in Lisbon and 140 in Porto.
Bolsa de Turismo de Lisbon (BTL)	Jan. 21-23	Lisbon, Portugal	More than 2,000 travel trade professionals in attendance; 250 business contacts
Feria Internacional de Turismo Madrid (FITUR)	Jan. 28-31	Madrid, Spain	Approximately 3,000 travel trade professionals, 500 business contacts
China Continental Tour Operator Fam	Feb. 10-14	Orlando	8 Shanghai-based tour operators and one Continental Airlines representative
Viajes El Corte Ingles Spain Fam	Feb. 22-26	Orlando	22 travel agents
Expo Vacaciones Trade Show	Mar. 2-4	Mexico City	890 trade and media professionals; 201 business contacts generating 5 leads
AGAXTUR Workshop	Mar. 11	São Paulo, Brazil	720 travel professionals; 175 business contacts generating 12 leads
NASTUR Presentation	Mar. 19	Nascimento, Brazil	240 travel professionals; 240 contacts generating 8 leads

**Europe**

Tradeshow/Mission/FAM	Date	Location	Audience
Vakantiebeurs	Jan. 12-14	Utrech, The Netherlands	14,500 in attendance; generated 14 business contacts and 10 leads

Lufthansa Challenge	Feb. 12-13	Seeheim, Germany (Lufthansa Training Center)	Co-sponsored with Disney Destinations Lufthansa's annual sales meeting for 400 of the key management and global account executives.
TUI Netherlands Fam	Mar. 6-8	Orlando	115 travel agents and 1 TUI escort
International Tourismus Boerse (ITB)	Mar. 11-15	Berlin, Germany	22 leads and 56 business contacts
DERTOUR Germany Fam	Mar. 16-20	Orlando	10 travel agents and 1 DERTOUR rep
AerLingus Ireland Fam	Mar. 19-24	Orlando	14 tour operators and travel agents and AerLingus rep
TUI Germany Fam	Mar. 22-24	Orlando	120 travel agents

### Strategic Alliances (Promotions)

Internationally, we had multiple promotions in the UK and Canada as part of our integrated efforts.

Below are some highlights from our first quarter activity:

Jan-March	Media Value	Market	Form of Media	Circulation	Impressions
GMTV – Promotion with top UK morning TV show featured one week of Orlando-themed segments	\$879,000	United Kingdom	TV/Online	6,500,000	33,833,000
<b>Totals:</b>	<b>\$879,000</b>			<b>6,500,000</b>	<b>33,833,000</b>

*Note: Circulation refers to unduplicated reach of the program.*

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## COMMUNITY RELATIONS/PUBLIC AFFAIRS

As part of the arts and cultural events grant process the Orlando/Orange County CVB coordinated in-kind marketing for the Zora Festival, Bach Music Festival, United Arts Fest, Regional History Museum, Orlando Arts Museum and Florida Film Festival including: Walmart PRN network listings, Member Magic e-newsletter, Orlando/Orange County CVB e-newsletter, Web site and e-blasts through Orlando/Orange County CVB dissemination channels.

**UCF Rosen College** – The Orlando/Orange County CVB met with Michael Terry, the new contact for events and collaboration with the UCF Rosen College. The college is in transition with this position. Ongoing were the last three classes for the Tourism Leadership Class with Rosen faculty and key staff. The classes were: Retail and Transportation Tourism at the Mall at Millennia January 2009, Food and Tourism at Darden Restaurants February 2009, Attractions, Tourism and Graduation at Universal Orlando March 2009. A total of 35 faculty and grad assistants attended.

**Hispanic Chamber Partnership** – The Orlando/Orange County CVB met and finalized an annual sponsorship agreement and participation for the 2009 Hispanic Business and Consumer Expo. The Orlando/Orange County CVB developed a Tourism Update section to be published on the Hispanic Chambers' homepage and a special issue of their monthly newsletter during the summer. The partnership also includes a breakfast with the president event to be scheduled in the second or third quarter of the year.

**Asian American Chamber Partnership** – The Orlando/Orange County CVB Executive Team participated in the Asian Chamber's Board Induction Ceremony, published a "Tourism Works for Us" ad in their quarterly newsletter, completed and published a Gary Sain's "Meetings Mean Business" article on the AACC website.

**Other** – During the first quarter, members of the Orlando/Orange County CVB team presented to more than 1,500 attendees at a total of 13 groups including: Universal of Lillehammer Norway, Asian Chamber

Induction Ceremony, SKAL International Orlando, Buena Vista Business Alliance, Rosen College Class, Schenck Company Quarterly Meeting, I-Drive Chamber Leadership Class, Onyx Awards Movie Premiere at OMART, Onyx Awards Reception and Ceremony, Orlando Young Professionals Leadership Group, Orlando Mayor's Neighborhood Summit, HSMAI Luncheon and the Tourism Development Council.

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About the Orlando CVB

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The Orlando/Orange County Convention & Visitors Bureau, Inc.® (Orlando CVB) is the only officially recognized sales and marketing organization for the Orlando and Orange County area. Chartered in 1983 as a private not-for-profit organization, we represent approximately 1,400 private businesses that make up the area's tourism industry. We are dedicated to promoting the area as one of America's great vacation and meeting destinations and providing comprehensive, unbiased information to all travelers.