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February 19, 2010

Organizational Highlights – Fourth Quarter 2009

Positive signs began to emerge in the fourth quarter of 2009 for the travel landscape. Most significant for our destination is the fact that we secured two high-profile conventions. The National Plastics Expo's move from Chicago to Orlando for 2012 and 2015 is, in my opinion, a game changer. The National Plastics Expo (NPE) is the second largest convention (est. 65,000 attendees) our destination has secured since the NAHB's International Builders Show chose Orlando in 1997. By the way, the International Builders Show returns to Orlando in 2011 and 2012. Pulling the NPE out of Chicago was truly a team effort by the Orlando/Orange County CVB, Orange County Convention Center, Orange County Government, the business community and our industry.

A show that will certainly have a positive impact on 2010 is Star Wars Celebration V. On the heels of NPE being announced in November, our team, along with the Orange County Convention Center, went all out to bring this exciting event to Orlando. From August 12-15, 2010, an estimated 35,000 attendees will come to Orlando to experience Star Wars' exclusive event and all that our great city has to offer. In addition, they will fill thousands of hotel rooms around our convention center and the destination bringing an estimated impact of nearly \$39 million in attendee spending.

We've also begun to see some positive signs coming from leisure visitation. Renewed interest for Orlando has begun to grow. Although occupancy and rate still are lagging behind, I feel that 2010 will be a slightly better year than 2009 in terms of leisure demand.

We continue to share the "Orlando Makes Me Smile" message both domestically and internationally, and we are proud to share some of the results in this report. One of our more high-profile events took place in Canada. To kick off our Canada marketing campaign, we took over Toronto's Union Station on November 4. With more than 191,000 daily commuters, Union Station is the largest commuter station in Canada. Orlando Makes Me Smile and Orlando imagery from our three parks partners were everywhere. From pillars to stairs to wall facings, Orlando brought the warm Florida sun and fun to the people of Toronto. To date the campaign has seen an increase in visits to our Canadian Web site of 185 percent, an increase of 324 percent in page visits and a 223 percent increase in the amount of vacation kits requested. That's on top of the record year we had last year. Look for the Orlando/Orange County CVB to do more of these types of events to engage the public domestically and internationally.

As we all know, 2009 was a tough year for the destination, but with adversity comes greater opportunity. We've continued to position Orlando as the one place to go when travelers begin to resume their vacations and it's paying off. Orlando was recently sited as the number one vacation destination by Travel Leaders in their Travel Trends Survey – the first time we have received such recognition. And for the first time, Orlando was named a travel hot spot in Yahoo Travels annual consumer survey.

With 2009 behind us, we are working hard to get Orlando's economic engine humming again.

Warmest regards,

A handwritten signature in black ink, appearing to be 'Gary', is written below the text 'Warmest regards,'.

Industry Performance

Orlando CVB Activities

Meetings & Conventions

Leisure Marketing

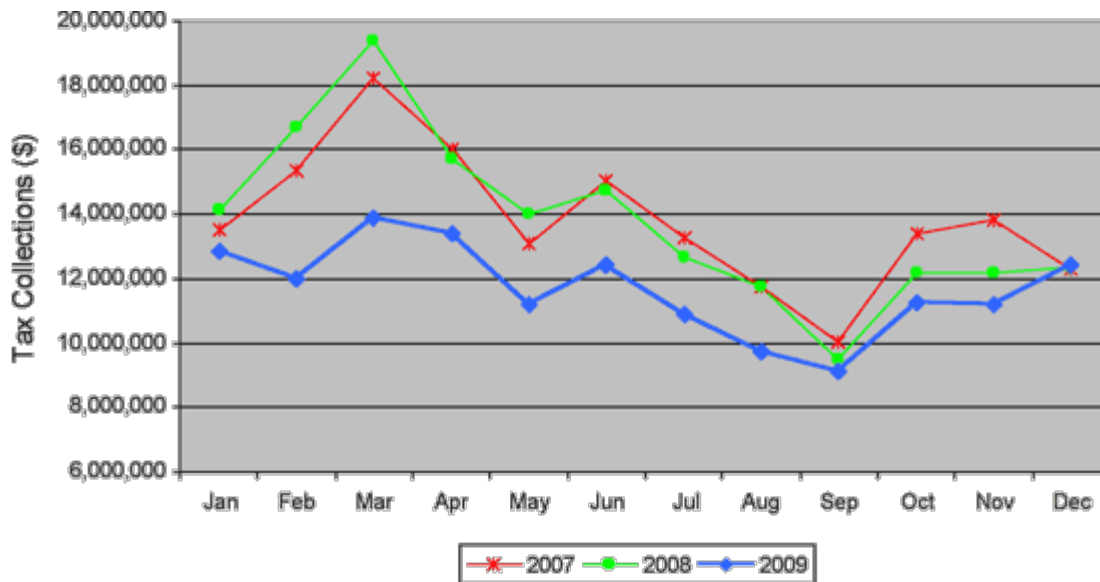
Publicity

Community Relations/Public Affairs

Marketing Products

INDUSTRY PERFORMANCE

Orange County Tourist Development Tax Collections

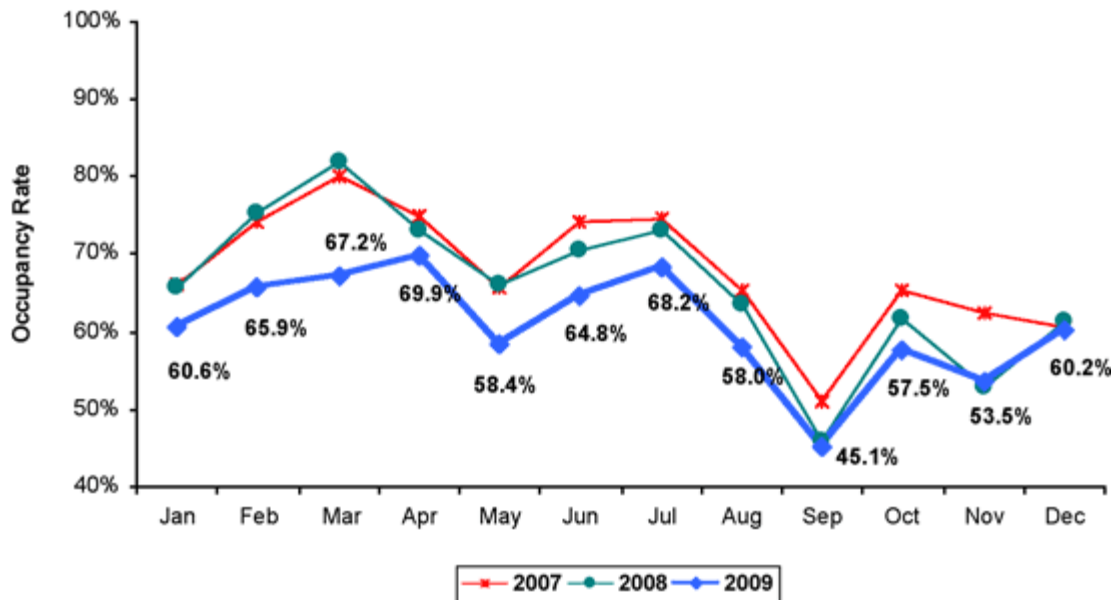


Metro Orlando Lodging Indicators

The following results are based on the official January through December 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 results 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



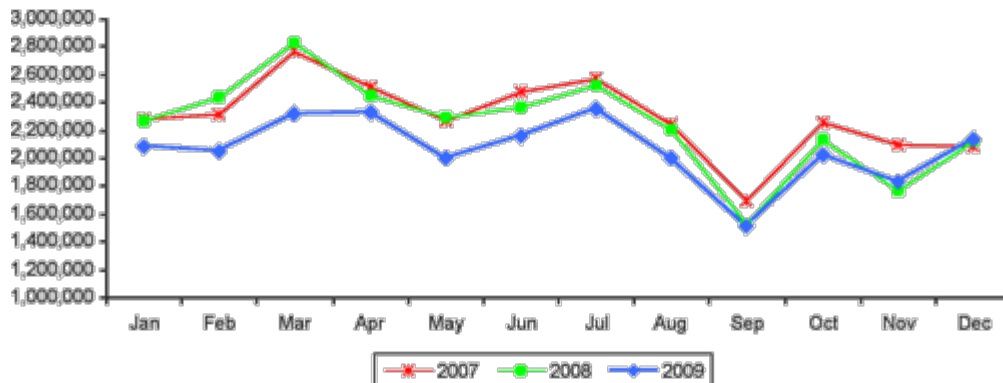
Occupancy

October-December	Q4 Results			Year-to-Date Results		
	2009	2008	Variance	2009	2008	Variance
Metro Orlando	57.1%	58.8%	-2.8%	60.7%	65.8%	-7.9%
National	50.6%	52.9%	-4.3%	55.1%	60.3%	-8.7%
Florida	52.6%	53.6%	-1.7%	56.5%	60.8%	-7.0%

Average Daily Rate

October-December	Q4 Results			Year-to-Date Results		
	2009	2008	Variance	2009	2008	Variance
Metro Orlando	\$89.02	\$100.67	-11.6%	\$92.91	\$105.83	-12.2%
National	\$95.47	\$103.24	-7.5%	\$97.51	\$106.96	-8.8%
Florida	\$98.03	\$108.27	-9.5%	\$105.37	\$117.90	-10.6%

Metro Orlando Room Night Demand



Room-Night Supply & Demand (in thousands)

October-December	Q4 Results			Year-to-Date Results		

	2009	2008	Variance	2009	2008	Variance
Supply¹	10,484	10,250	2.3%	40,843	40,869	-0.1%
Demand²	5,987	6,023	-0.6%	24,802	26,933	-7.9%

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

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

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ORLANDO/ORANGE COUNTY CVB ACTIVITIES

MEETINGS & CONVENTIONS (M&C)

The fourth quarter M&C performance reflected many of the challenges that had been seen throughout 2009, but had positive achievements as well. Leads, primarily from the corporate market, continued to be down to goal and year over year pace. The positive story was that definite room night bookings were up considerably as the Orlando/Orange County CVB, along with our hotel partners, were able to close on a significant amount of contracts. Large bookings such as National Plastics Expo and Star Wars Celebration V had a significant impact.

Also, the team was able to capture a huge number of tentatives and finish a strong 92 percent of the team's 2009 attendance goal (for all future years), with meetings representing 1,626,010 definite attendees being booked.

Convention Sales Performance

	October-November		Comparison to Goal		Comparison to Prior year	
	Q4 2009	Q4 Goal	Variance	Q4 2008	Variance	
Leads	542	810	-33%	570	-5%	
Definites	303	n/a	n/a	276	9.8%	
Definite Attendance	637,428	439,969	45%	557,814	14%	
Definite Room Nights Estimated¹	1,402,342	967,932	45%	1,227,191	14%	
Definite Room Nights Requested²	778,196	546,161	42%	614,377	27%	

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

² Definite Room Nights Requested = Room blocks actually requested by meeting planners

	January-December		Comparison to Goal		Comparison to Prior year	
	YTD 2009	YTD Goal	Variance	YTD 2008	Variance	
Leads	2,186	3,212	-32%	2,704	-19%	
Definites	963	n/a	n/a	1,163	-17%	
Definite Attendance	1,626,010	1,759,760	-8%	1,701,854	-4%	
Definite Room Nights Estimated¹	3,577,222	3,871,472	-8%	3,744,079	-4%	
Definite Room Nights Requested²	1,976,490	2,184,500	-10%	2,144,876	-8%	

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

2 Definite Room Nights Requested = Room blocks actually requested by meeting planners

Convention Marketing Update

Three major activities dominated Q4 meetings and conventions marketing activity. The first was the finalization of M&C branding guidelines and new creative tone to support the brand platform. During this branding process, we gathered ongoing input from our Convention Sales Committee as well as internal Orlando/Orange County CVB stakeholders. Both groups supported the “value creation through inspiration” concept. The core message: *Orlando meetings are a great value that go beyond just traditional cost-savings. Value is also found in the diversity of hotel options, breadth of meeting space, accessibility, and superior service.*

Working with our creative ad agency, PUSH, we also finalized a new creative look for M&C that is bold, attention-getting and memorable. The new design is also being applied to new marketing materials for both attendance-building and welcome initiatives, which will greatly support the Destination Management Services department.

A second major focus in Q4 was the planning and creation of initial marketing ads and editorial copy for the 2010 “C-suite” marketing program. This program has three primary components: a wrap on select issues of *Fortune* magazines, online advertising in SmartBriefs online e-newsletters, and a digital banner ad program in which Orlando banners appear on a mix of top Web sites that reach C-level (e.g. CEO, COO, CFO) executives.

The list of 2,500 C-suite executives who will receive the *Fortune* wrap was developed, the content and design were approved for the first issue, and a mutually beneficial content development/marketing relationship was forged with St. Louis-based Maritz Travel.

The M&C marketing department also conceptualized and produced a large number of marketing materials for the Professional Convention Management Association (PCMA) annual meeting in January 2010. Many of these pieces came about as part of the Orlando/Orange County CVB’s Gold Sponsorship of PCMA (in partnership with the Orange County Convention Center). Among the marketing initiatives: presentation to our “auction winner” at general session, by Gary Sain and the OCCC’s general manager Jessie Allen; introduction/speaking time for Gary at targeted breakout sessions; participation in a one-on-one meeting program with pre-selected meeting planner prospects; creation of an amenity for distribution to 750 meeting professionals; Orlando/Orange County CVB/OCCC advertising in the PCMA Show Daily publication; digital recognition on a video wall; plus various onsite and online recognition opportunities.

Events

Tradeshows/Missions/FAMS	Date	No. of Attendees / Participants	Total Leads Generated / Average Peak Rooms / Total Room Nights
Pharmaceutical Meeting Planners Symposium	Oct. 5-6	250	This was an educational event, not a lead generator.
National Panhellenic Conference Annual Meeting	Oct. 8	147	No leads generated from this event, due to low attendance. Recommendation made not to attend this event in the future.
Maritz FAM	Oct. 8-11	14	3 / 1,833 / 20,546
Virginia Gold Cup	Oct. 17	258	2 / 540 / 4,850
Tallahassee Society of Association Executives Education Day	Oct. 21	1,125	5 / 94 / 920
Medical Advisory Board	Oct. 22-24	9	This was an educational event, not a lead generator
Rejuvenate Tradeshow	Oct. 27-30	771	13 / 267 / 14,493
Tennessee Sales Mission	Nov. 3-5	17	2 / 400 / 3,058
Florida Encounter	Nov. 15-18	-	2 / 50 / 285

Government Blitz in Washington DC	Nov. 17-18	30	1 / 180 / 625
NCBMP FAM (National Coalition of Black Meeting Planners)	Nov. 29-Dec. 2	10	1 / 60 / 180
National Coalition of Black Meeting Planners (TS)	Dec. 2-5	279	1 / 60 / 180
MACE (Mid-Atlantic Conference & Exposition, Potomac Area chapter's MPI conference)	Dec. 9-10	200	No leads generated from this event.
Association Forum of Chicagoland-Holiday Showcase	Dec. 15	1,350	No leads generated from this event. People stopped by our booth more for service needs.
International Association of Exhibition & Events	Dec. 9	1,800	1 / 4,400 / 11,500
D.C. Holiday Luncheons Mission	Dec. 14-18	79	1 / 4,500 / 34,100

Number of Meeting Client Site Visits, Oct. 1 – Dec. 31	69
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LEISURE MARKETING

Domestic Marketing Campaign

The Domestic Fall Campaign continued in October and November with print advertising running in multiple publications such as *Southern Living*, *Travel & Leisure*, *Florida Travel & Life*, *People en Espanol*, and news weeklies throughout Florida and the Atlanta metro. A strong radio presence was maintained in October on a variety of radio stations in major Florida metros and Atlanta as well. Orlando's four television spots continued to run on our digital board in New York's Times Square.

The Deal of the Week program continued in fourth quarter as well. Throughout the year, the Orlando/Orange County CVB partnered with more than 12 accommodation members/OTAs, and asked them to provide an exclusive offer to the Orlando/Orange County CVB for a limited-booking window. The offer had to include a free night and at least a \$75 resort credit or value-add. The program generated more than 1,500 additional room nights for the destination from April through December, with more than 34,000 online referrals to Orlando/Orange County CVB members.

A direct mail piece was sent to approximately 250,000 households on August 27, 2009 which included consumers from our in-house database but also from a purchased list. There were two versions: Families and couples residing in Atlanta/South Georgia and Florida (excluding the Central Florida area). The second drop was a postcard which was sent out in September to 100,000 households taken from the original audience list. These 100,000 were consumers that did not respond to the first piece. This resulted in 2,906 visits to the unique Web page and 2,300 people provided a unique code so they could be tracked. We also sold \$9,115 in attraction tickets and 1,195 vacation planning kits were ordered.

Canadian Marketing Campaign

The Canada Campaign went into high gear during the fourth quarter of 2009. A major advertising launch was implemented with the emphasis of influencing Canadian travel during the winter and spring time frames. Beginning late October the Orlando/Orange County CVB hosted a one-hour travel radio show (The Chris Robinson Travel Show) airing in Ontario and reaching over 700,000 listeners. The following week television ads began running across Ontario within City TV, CH-TV & Global TV in a heavy rotation for the entire month of November. Extensive web ads ran for a six-week flight on Canoe.ca as well as the Weather Network. A six-page broadsheet destination special section was produced and distributed November 4 to over 1.1 million households in southern Ontario. One of the most significant elements of the campaign was

the media and engagement efforts surrounding Toronto's Union Station (subway station). Recognized as the single busiest transportation hub in Canada with over 191,000 daily commuters, the Orlando/Orange County CVB transformed the entire station and 156 facings of posters, banners, pillars and walls with the Orlando Makes Me Smile campaign creative. The creative remained up throughout the entire month of November being seen by over 5.3 million persons. To create a truly engaging atmosphere the Orlando/Orange County CVB also introduced hundreds of tropical palm trees into the subway system while street teams handed out free tokens, newspaper inserts, luggage tags and coupons for free coffee. In neighboring Dundas Square (Canada's busiest intersection), Canada's #1 morning television show broadcasted live from an Orlando-themed outdoor set and gave away trips to Orlando on air. Also throughout the month of November, Orlando TV spots aired 420 times/day upon an outdoor jumbotron in Dundas Square, reaching 3.3 million pedestrians. The Orlando/Orange County CVB extended its reach into Quebec with a province-wide promotion in 340 Jean Coutu Pharmacy stores which featured Orlando within 10 million inserts, in-store signage and over \$1 million in dedicated television spots. As a result of this aggressive campaign the Canada Web site has recognized a 185% increase in the amount of visits to the site, 324 percent increase in pages visited and a 223 percent increase in amount of vacation kits requested as compared to 2008 which was a record year.

Brazilian Marketing Campaign

The Brazil Campaign completed its final phase for 2009. The campaign continued its successful run with almost 20,000 page views for the tour operator home page through the end of December, as well as reported increases in bookings ranging from 45 to 75 percent. A total of 133,000 page views to the campaign landing page reflected an increase of 724 percent over 2008. Media impressions generated from the television, print and online ads totaled 61 million through December 31.

United Kingdom Marketing Campaign

The UK Campaign continued into the fourth quarter with television running through the second week of October and featuring tour operator partners as the call to action. Trade support for the campaign was centered around the annual trade show - World Travel Market (WTM) from November 9-12. Gary Sain and Jay Santos joined the London-based Orlando/Orange County CVB team to conduct 54 trade appointments and attend a number of key industry events, including those hosted by Virgin Holidays and British Airways. These appointments gave the team an up-to-date understanding of the state of the UK market, as well as an opportunity to discuss a number of key co-operative marketing initiatives for the first quarter of 2010 to create maximum visibility in the market during one of the prime holiday booking periods. The Orlando/Orange County CVB was awarded the Virgin Holidays Bronze Award for its destination marketing campaign in the UK, a first for the Orlando/Orange County CVB, at their annual Virgin Holidays WTM event. In addition, publicity efforts increased the social media activity by targeting key travel bloggers, as well as targeting the UK media with Winter Sun and shopping messages in this key holiday season.

Media Buy

Fourth Quarter

Advertising Vehicle	Impressions	Description
Online Advertising - Domestic	71,056,000	Google/Yahoo pay per click and display networks
Fall Campaign	81,731,000	Radio, Print, Online, Outdoor
Domestic Outdoor	138,000,000	Digital billboard in NY Times Square
UK Campaign	114,000,000	Television, Newspaper Advertorial, Online
Brazil Campaign	59,236,000	Newspaper, Magazine and Online media
Canada Campaign	20,498,000	Newspaper, TV, Out of Home, Radio

Web Site

Traffic to the Web site remained strong. This is due to the first year of concentrated SEO strategy and additional publicity and marketing driving traffic to the site.

October - December	Comparison to Goal			Comparison to Prior Year	
	Q4 2009	Q4 Goal	Variance	Q4 2008	Variance
Monthly Unique Visitors	1,006,433	730,000	38%	737,240	37%
Total Page Views	4,976,005	4,895,760	2%	3,881,532	28%
Total Visits	1,071,781	803,000	33%	799,207	34%

Pages Viewed Per Visit	4.643	6.097	-24%	4.857	-4%
Time Per Visit (average minutes)	6.550	6.700	-2%	6.770	-3%
Web Site Sessions¹	1,266,932	1,072,300	18%	936,103	35%

¹ Represents hourly unique visitors.

January - December	Comparison to Goal			Comparison to Prior Year	
	YTD 2009	YTD Goal	Variance	YTD 2008	Variance
Monthly Unique Visitors	4,371,340	3,200,000	37%	3,056,717	43%
Total Page Views	24,121,539	21,000,000	15%	18,735,741	29%
Total Visits	4,706,806	3,520,000	34%	3,375,794	39%
Pages Viewed Per Visit	5.12	5.39	-5%	5.6	-8%
Time Per Visit (average minutes)	6.85	6.83	0.33%	7.4	-8%
Web Site Sessions¹	5,550,632	4,700,000	18%	3,966,327	40%

¹ Represents hourly unique visitors.

Social Media

In the fourth quarter we continued to expand upon our destination Twitter page and Facebook fan page with fresh content.

Twitter: Short messages (Tweets) allow us to share news, deals, contest information and more with a growing list of followers.

Facebook: The same options also exist on Facebook with the added opportunity to share videos, photographs, and other messages to fans of Visit Orlando. In order to expand our fan base, we purchased Facebook ads with a budget of \$16,000. This allowed us to add between 10,000 and 11,000 new fans.

YouTube: Our user channel allows us to share Orlando videos on the world's most popular video sharing web site.

TripAdvisor: Orlando is positioned as a Destination Expert in Trip Advisor's highly visited forums where members of our call center staff offer their expertise by answering user questions about the destination.

October-December	Created	Q4 Fans/Followers	Q4 Videos Viewed	Q4 User Interactions*
Facebook	5/14/09	9,045	378	1,784
Twitter – VisitOrlando	2/5/09	707	n/a	4,963
Twitter – 67 Days	8/25/09	75	n/a	Not tracked
YouTube	12/5/08	16	21,769	n/a
TripAdvisor	9/30/08	n/a	5,200	168

*Comprised of TripAdvisor Forum Posts, Twitter links clicked and Facebook likes and comments.

January-December	Created	YTD Fans/Followers	YTD Videos Viewed	YTD User Interactions*
Facebook	5/14/09	14,333	3,431	3,817
Twitter – VisitOrlando	2/5/09	3,700	n/a	11,192
Twitter – 67 Days	8/25/09	885	n/a	Not tracked
YouTube	12/5/08	129	65,005	n/a
TripAdvisor	9/30/08	n/a	20,500	595

*Comprised of TripAdvisor Forum Posts, Twitter links clicked and Facebook likes and comments.

Travel Professional

For the Domestic/Canadian, the team focused on trade, December marked the “Year of the Travel Agent” culmination with recognition of online travel agent training graduates, increased presence with our new representation in Canada and more face-to-face interaction.

Domestic & Canada

Tradeshaw/Mission/FAM	Date	Location	Audience
Orlando Travel Academy Graduate FAM	Oct. 1-5	Orlando, FL	33 U.S. & Canadian Retail Travel Agents & Tour Operators
Air Canada Travel Agent Book & Win Contest	Oct. 1-31	Canada	5,000 Canadian Retail Travel Agents

American Express Centurion & Platinum Call Center Training	Oct. 13	Jacksonville, FL	100 Reservation Agents
Vacation.com Regional Fall Conference	Oct. 15	Toronto, ON	100 Retail Travel Agents
Selloffvacations.com Call Center Training	Oct. 21	Toronto, ON	50 Reservation Agents
ITravel2000.com Call Center Training	Oct. 27	Toronto, ON	85 Reservation Agents
Maritime Travel FAM	Nov. 2-9	Orlando, FL	15 Retail Travel Agents
AAA / Worlds of Discovery FAM – Host Opening Dinner with Destination Presentation	Nov. 11	Orlando, FL	55 AAA Auto Counselors and Travel Agents
Canadian Tour Operator Sales Calls & Meetings	Nov. 16-18	Toronto, ON	6 Top Tour Operators, Online Travel Agency, Canadian Automobile Assoc.
Disney Earmarked Conference	Nov. 17-18	Orlando, FL	450 Top Agents selling Disney product
Orlando Travel Academy Graduation Ceremony	Nov. 18	Toronto, ON	70 Retail Travel Agents & Tour Operators
Holiday Escapes Training	Nov. 19	Halifax, NS	5 Retail Travel Agents
Maritime Travel National Staff Conference – Tradeshow & Training Sessions	Nov. 20-22	Halifax, NS	198 Retail Travel Agents
WestJet Vacations Call Center Training	Nov. 25	Calgary, AB	75 Reservation Agents
AAA Auto Club South Training & Sales Calls	Dec. 9	Jacksonville, FL	11 Auto Counselors

Latin America/Spain

Tradeshow/Mission/FAM	Date	Location	Audience
Mexico Mission	Oct. 5-9	Guadalajara, Monterrey and Mexico City, Mexico	Travel trade and media events in three Mexican cities: Guadalajara - 70 travel agents participated; Monterrey - 60 travel agents participated; Mexico City - 95 travel agents participated.
China-U.S. Tourism Directors Summit	Oct. 20-23	Orlando, FL	Orlando/Orange County CVB partnered with U.S. Travel Association and Walt Disney World Resort to host Chairman Shao Qiwei of the China National Tourism Administration and tourism directors from 22 Chinese provinces for the third annual summit; event included meetings and tours of local attractions.
Nina Vacaciones Costa Rica FAM	Oct. 20-23	Orlando, FL	9 travel agents participated with one American Airlines representative.
TACA Airlines Inaugural VIP FAM	Nov. 4-7	Orlando, FL	FAM tour to commemorate new air service between Orlando and San Salvador, El Salvador. Delegation of 34 participants included VIPs of TACA Airlines as well as wholesalers and travel agents originating from San Salvador, Costa Rica, Nicaragua and Guatemala.
United Airlines China FAM	Nov. 7-12	Orlando, FL	11 tour operators and two media representatives from southern China
			Seminars conducted for 305 travel agents in Central America to promote new air service to Orlando. Cities visited

TACA Airlines Seminars	Nov. 9-13	Central America	included San Salvador, El Salvador; San Pedro Sula, Honduras; Guatemala City; San Costa Rica and Managua, Nicaragua.
FIT Trade Show (Feria Internacional de Turismo)	Nov. 12-18	Buenos Aires, Argentina	Represented at key Argentine trade show.
Festival do Gramado Trade Show	Nov. 22-25	Gramado, Brazil	Represented at key regional trade show in Brazil with over 1,700 travel agents in attendance.
Japan Delta FAM	Nov. 22-26	Orlando, FL	Hosted 5 travel agents working with meetings and incentive business and 1 Delta representative.
Regio Operadora Monterrey, Mexico FAM	Dec. 5-9	Orlando, FL	Partnered with Mexican tour operator, Regio Operada, and American Airlines in hosting 10 Mexican travel agents.

Europe

Tradeshow/Mission/FAM	Date	Location	Audience
DERTOUR German FAM	Oct. 3-9	Orlando, FL	12 travel agents & 1 DERTOUR representative
Martinair Inaugural Event	Oct. 15-17	Orlando, FL	75 Dutch and German travel trade VIPs
World Travel Market	Nov. 9-12	London, UK	Gary Sain, Jay Santos and the UK Team attended World Travel Market in London which was attended by 45,000 travel industry participants. The team had 54 engagements and Orlando received a coveted Virgin Holidays award for best destination partnership.
Orlando Holiday Specialist UK Super FAM	Dec. 1-8	Orlando, FL	FAM included 75 graduates of Orlando Holiday Specialist Program who qualified to participate in this FAM.
SeaWorld Parks & Entertainment United Kingdom FAM Tour	Dec. 9-13	Orlando, FL	30 UK travel agents hosted by SeaWorld Parks & Entertainment with support from Orlando/Orange County CVB.
Visit USA Road Shows	Dec. 1-3	Kent, Liverpool and Belfast, UK	Nearly 300 travel agents in the UK.
Bon Voyage Travel & Tour UK Site Inspection Tour	Dec. 2 & 9	Orlando, FL	Orlando/Orange County CVB organized series of local hotel site inspections for 14 UK travel agents.

Broadcast E-mail	Date	Location	Audience
Orlando Travel Academy FAM Survey	Oct. 26	Orlando, FL	33 Orlando Travel Academy Graduate FAM Participants
Orlando Travel Academy Graduate Newsletter	Oct. 30	Orlando, FL	2,000 Orlando Travel Academy Graduates
Canada Orlando Travel Academy Graduation Invitation	Nov. 2	Orlando, FL	100 Orlando Travel Academy Graduates

Orlando Tour & Travel Reference Manual Survey	Nov. 5	Orlando, FL	87,000 Retail and Home-based Travel Agents
Orlando Travel Academy Promotion via Canadian Travel Press	Nov. 14	Orlando, FL	21,000 Retail Travel Agents in Canada
Orlando Travel Academy Graduate Newsletter	Nov. 18	Orlando, FL	2,200 Orlando Travel Academy Graduates
Travel Industry Member e-blast	Nov. 20	Orlando, FL	87,000 Retail and Home-based Travel Agents
French Orlando Travel Academy Promotion via Tourisme Plus	Nov. 30	Orlando, FL	5,200 Retail Travel Agents in Quebec
Orlando Travel Academy Promotion via Travel Agent Magazine	Dec. 8	Orlando, FL	60,000 Retail and Home-based Travel Agents
Orlando Travel Academy Graduate Newsletter	Dec. 16	Orlando, FL	2,400 Orlando Travel Academy Graduates

Brochure Distribution	Date	Location	Audience
Orlando Travel Agent Passport	Oct. - Dec.	Orlando, FL	10 Retail Travel Agents
Orlando Tour & Travel Reference Manual – The Travel Week Group/Hippo Express	Oct. 15	Canada	15,300 Retail and Home-based Agents
Orlando Tour & Travel Reference Manual – Ensemble Annual Conference	Oct. 15	Canada	600 Retail Travel Agents

Strategic Alliances (Promotions)

Below are some highlights from our fourth quarter activity:

October - December	Media Value	Market	Form of Media	Circulation	Impressions
Jean Coutu Drug Stores – Multi-media promotion with leading Canadian retail chain	\$1,675,000	Canada – East	TV/Radio/POP	25,500,000	25,500,000
Pizza Hut – Regional promotion in 15 Midwestern States	\$1,346,000	U.S. – Regional	TV/Radio/In-store	3,000,000	41,550,000
Champs Sports – National promotion supporting Champs Sports Bowl Game	\$590,000	U.S. – National	TV/In-store/Online	6,300,000	19,653,000
Free-For-Fall – Media promotions in 6 Florida/SE markets and Marlins/Braves baseball to support fall campaign	\$551,000	U.S. – Southeast/Florida	Radio/Online/In-Stadium	6,000,000	14,000,000
TOTALS:	\$4,161,000			40,800,000	100,704,000

Direct Marketing

The Canada direct marketing campaign was sent to approximately 150,000 households at the end of November 2009 to consumers residing in the Toronto and Southern Ontario area. The campaign's creative and messaging complemented the 2009 "Orlando Makes Me Smile" campaign, which included a strong retail message for the Smile offers and discount attraction tickets (a discount on top of the standard discount was included). The creative provided space for five pre-formatted partner advertisements. Our participating partners were included both on the direct mail piece and the campaign landing page. There were 5,000 page views to the two landing pages, \$10,000 in ticket sales and 230 vacation planning kit orders.

The UK direct mail piece dropped in October. It went to approximately 200,000 UK households residing in

areas convenient to a Virgin hub since they were a partner. The campaign's creative complemented the larger UK marketing campaign and included a self-mailer. Consumers were able to request more Orlando information by going to a unique URL or calling a unique 800 number. There were 242 views of the unique landing page, 126 vacation planning kit requests and 42 referrals to the Virgin offer. Note: results may have been affected by a postal strike that was occurring during this time.

In addition to the direct marketing campaigns, we also sent out the following domestic consumer e-mails in fourth quarter:

US

Month	Delivered	Open Rate	Click Through Rate
October	639,000	6.7%	17.7%
November	590,000	6.8%	19.0%
December	643,000	6.0%	8.7%

Florida

Month	Delivered	Open Rate	Click Through Rate
October	68,000	12.9%	27.1%
November	64,000	13.4%	30.8%
December	68,000	8.7%	11.8%

Visitor Services

Call Center/Out-of-Market Ticket Sales

Overall, the year was more positive than expected with e-mail up slightly and hits to the ticket home page are up 58 percent over 2008. This counter-balanced a decrease in walk-ins and phone calls. Out-of-Market ticket sales were up 6 percent over 2008 which exceeded budget slightly by 1 percent.

Official Visitor Center (OVC)

Visitors were down 3.7 percent versus 2008, however ticket sales were up 2 percent over prior year which exceeded budget by over 11 percent.

Guest Services

Ticket sales are about 15 percent lower than 2008, however exceeded budget by 59 percent.

October - December	Q4 2009	Q4 2008	Variance
Number of Walk-ins (Visitor Center)	22,569	24,721	-9%
Phone Calls Received (Call Center & Visitor Center)	8,411	9,574	-12%
E-mails Processed (Call Center & Visitor Center)	901	795	13%

January-December	YTD 2009	YTD 2008	Variance
Number of Walk-ins (Visitor Center)	101,647	105,598	-4%
Phone Calls Received (Call Center & Visitor Center)	43,528	50,780	-14%
E-mails Processed (Call Center & Visitor Center)	4,016	3,823	5%

PUBLICITY

Publicity has a record-breaking year with more than \$52 million in exposure.

July - December		Comparison to Goal		Comparison to Prior Year	
	Q4 2009	Q4 Goal	Variance	Q4 2008	Variance
Number of Clips	975	625	56%	446	119%
Circulation	195,641,000	504,407,000	-61%	784,977,000	-75%
Value¹	\$8.6M	\$5.6M	54%	\$18.3M	-53%

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

January - December		Comparison to Goal		Comparison to Prior Year	
	YTD 2009	YTD Goal	Variance	YTD 2008	Variance
Number of Clips	3,900	3,300	18%	2,000	95%
Circulation	1,430,415,000	1,272,899,000	12%	1,767,849,000	-19%
Value¹	\$52.0M	\$44.8M	16%	\$48.4M	7%

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

Change in circulation numbers relates to the use of new formulas for calculating page views. Old values were based on home page views which for some outlets like CNN.com could be as high as 83 million. New values take into account the placement of the article within the site.

October - December	Q4 2009
Press Tours	Results
Shopping and Spas UK Press Trip, Oct. 1-7, Orlando	Five journalists brought to Orlando to provide the journalist and their readers with a new way of looking at Orlando. The itinerary emphasized that even luxury is affordable in Orlando. Publications included: <i>New! Magazine</i> (circ. 442,996); <i>The Sun</i> (circ. 3,128,501); <i>Best</i> (circ. 296,971); <i>Irish Herald</i> (circ. 82,854) and Kent Messenger Group (circ. 435,182).
Lufthansa Pan European Press Trip, Nov. 21-23, Orlando	Eight journalists from across Europe to highlight the new code-sharing agreement between Lufthansa and JetBlue which makes it much easier for leisure and business travelers to fly between Europe to the US. Journalists included <i>Il Sole 24 Ore</i> (circ. 500,000); <i>Le Monde</i> (circ. 350,039); <i>La Tribune</i> (circ. 77,778); <i>ABC</i> (circ. 359,842); <i>Der Standard</i> (circ. 117,759); <i>Stavanger Aftenblad</i> (circ. 68,010); <i>De Tijd</i> (circ. 48,751) and <i>Business Traveller</i> (circ. 10,000).
Germany for Adults, Dec.	Five journalists brought to Orlando. Although Germans are feeling the effects of the global economic slowdown, travel is still a major priority for them. The participating journalists were writing for several publications and outlets and coverage should be earned in the following outlets: marcopolo.de (400,000)

2-7, Orlando	visitors); falk.de (5.1 million visitors); fem.de (6.3 million visitors); just2guide.de (1 million visitors); msn.de (280 million visitors); <i>Selection</i> (circ. 50,000); <i>Drive</i> (circ. 50,000); <i>Meine Freizeit/Sevensesociety.com</i> (350,000 visitors); <i>Prisma</i> (circ. 4.3 million) and <i>Westfälische Nachrichten</i> (circ. 310,000).
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October - December	Q4 2009
PR Tradeshow/ Mission/Events	Results
TIA Media Marketplace, Oct. 18-21, Sao Paulo, Brazil	A total of 50 trade and consumer media outlets in the market attended the event. During the event, several interviews for the attending broadcast and print media were conducted including: Betty Abrahão & Você (viewership 1.5 million); Programa Paulo Leoni (viewership 600,000); TV Travel News (viewership 6.5 million) and Maristela do Valle, freelancer. Following the TIA Media Marketplace, one-on-one media meetings included: Hoje em Dia (TV RECORD) (viewership 30 million); Terra Portal (3.1 million page views/ month); <i>Atrevida</i> (Ed. Escala) (circ. 100,000); <i>Larissa, Pais & Filhos</i> (Ed. Manchete) (circ. 20,000); <i>Marie Claire</i> (Ed. Globo) (circ. 215,735) and <i>TAM Nas Nuvens/RED REPORT</i> (circ. 150,000/40,000).
ABAV, Oct. 21-23, Rio de Janeiro, Brazil	One-on-one media appointments included <i>Hôtelier News</i> (circ. 850,000 page views/month); <i>Revista Eventos</i> (circ. 30,000); <i>Top Magazine</i> (circ. 40,000); <i>Scritta</i> (Copa Airline's Press Service); <i>Banco Hoje, Grupo Técnico de Comunicação</i> ; <i>Informe Comunicação e Marketing</i> ; <i>Revista do Turismo</i> (circ. 55,000); <i>Jornal Turismo de Minas</i> (circ. 10,000); <i>O Tempo</i> (circ. 35,000); <i>Tribuna do Norte</i> (circ. 12,000); <i>Viaje Mais</i> (circ. 50,000); <i>Banstur Newspaper</i> (circ. 15,000); <i>Expressions Magazine</i> (circ. 50,000); <i>Guia Local Channel</i> (circ. 2,000); <i>Brasilturis</i> (circ. 16,000); <i>Viajar pelo Mundo</i> (circ. 45,000); <i>Amazonas Em Tempo</i> (circ. 35,000); <i>Panrotas</i> (circ. 8,600); <i>O Tempo</i> (circ. 35,000) and <i>Correio da Paraíba</i> (circ. 19,000).
New York Media Mission with Members, Nov. 9-11, New York City, NY	Conducted media calls, hosted a culinary/unexpected Orlando event and attended an event for Mommy Bloggers. The culinary/unexpected themed event showcased why Orlando needs more respect as a dining destination with a spectacular four-course meal prepared for event attendees. The event was attended by a wide array of media interested in learning about a different side of Orlando and included <i>Travel + Leisure</i> , Martha Stewart Radio, and <i>Latina Magazine</i> , among others. The Mommy Blogger Event featured an information panel on how companies can work with mommy bloggers followed by a meet & greet brunch attended by more than 40 influential mommy bloggers. Individual media calls were conducted with <i>Time</i> (circ. 3,372,240), <i>Family Circle</i> (circ. 3,932,510), concierge.com, American Express publishing, <i>New York Family</i> (circ. 27,238) and <i>The Bergen County Record</i> (circ. 60,618).

Individual Press Trips to Orlando	No. of Journalists	
Oct. 1 – Dec. 31	26	Dana Hammond, <i>AAA Traveler</i> Jose de Oliveira, Bible Broadcasting Network Michael Smith, <i>Carolina Forest Chronicle</i> Felicia Mann, <i>Charisma</i> Doug Parker, CruiseRadio.net Harold George, DinosaurusandRockets.com Richard Kerekes, <i>EntertainingU</i> newspaper Kelby Carr, Freelancer Diane Bair, Freelancer David Kelly, Freelancer Mary LeBeau, Freelancer Charles Passy, Freelancer Chanize Thorpe, Freelancer Teresa Hershberger, <i>Gulf Coast Parent</i>

	Michele Karl, <i>The Herald Newspapers</i> Scott Kaviieff, KFMB-TV Tracy Squadrito, "The Ovideo Chicks Talk Show" Etty Shiraz, <i>Promise Lifestyle Magazine</i> Kathy Beck, <i>Senior Connection/Mature Lifestyles</i> David Carman, <i>Voyagezradio.com</i> Josh Danzig, <i>Where Y'at Magazine</i> Candace Hutchins, WHNS Fox Carolina News Jonathan Eltrevoog, WONU-FM Mike Baily, <i>WorldGolf.com/OrlandoGolf.com/TravelGolf.com</i> Bill Herrero, WYFF News 4 Patty Valdes, Los Fonos WCMQ 92.3 FM
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COMMUNITY RELATIONS/PUBLIC AFFAIRS

Charity Requests & Involvement

During the fourth quarter of 2009, the Orlando/Orange County CVB responded to 13 charity requests and coordinated a food drive for the Second Harvest Food Bank of Central Florida at its Annual Member Meeting on December 11. Pirate's Dinner Adventure joined the food drive, which gathered a total of 1,891 pounds of food or 1,260 meals. For 2009, the Orlando/Orange County CVB supported 41 charitable events and sponsorships. Donations totaling \$105,249 in cash, in-kind support and materials from member and staff events has been provided to different charities such as: Heart of Florida United Way, the YMCA Aquatic Center, A Gift for Teaching, Give Kids the World, the Dr. Phillip's Hospital Perry Pavilion, the Coalition for the Homeless of Central Florida, the Center for Independent Living, the Salvation Army, Second Harvest Food Bank of Central Florida, Arnold Palmer Hospital Foundation, etc.

The Orlando/Orange County CVB also supported 11 Arts and Cultural partners and programs in 2009 for a total in-kind marketing contribution of \$395,000. Arts and cultural partners and events such as the Orlando Museum of Art, the Zora Festival of the Arts & Humanities, Orlando Arts Getaways, Arts Fest, Juneteenth Music Festival, the Chocolate Nutcracker, the 74th Annual Bach Festival, etc. The Orlando/Orange County CVB's in-kind marketing and charitable donations for 2009 totaled \$500,024.

During the fourth quarter, the Orlando/Orange County CVB presented to eight groups with a total of 1,552 attendees. The groups included the I-Drive Chamber Tourism Luncheon, Dr. Phillips Rotary Club, UCF Rosen College DMO Class, Asian American Hotel Owners Association, UCF Executive Center University of Madrid MBA's, National Association of RV Campgrounds, UCF Rosen College Class and Arnold Palmer Thank You Breakfast.

ZORA Legacy Awards and Zora Festival Marketing Partnership

The Orlando/Orange County CVB team supported the Zora Legacy Committee by hosting planning meetings and conference calls for the Zora Legacy Awards Committee, as well as developing a sponsorship program and marketing plan for the 2010 Zora Festival and Legacy Awards event. The Orlando/Orange County CVB team negotiated a sponsorship agreement for the Zora Legacy Awards event, and assisted the Zora Festival in securing the UCF Rosen College campus and auditorium as the venue for the Legacy Awards event. Other support included: writing a letter of support for the Zora Festival Grant and drafting and distributing sponsorship solicitation letters for the Zora Legacy Awards event on January 30, 2010.

ZORA Neale Houston – Jump at the Sun Program

The Orlando/Orange County CVB developed and coordinated the production of an in-kind video and PowerPoint presentation for the Jump at the Sun program. The video is being donated by the High Impact Media and features the Orlando/Orange County CVB's leadership in promoting youth education and career opportunities in the tourism industry.

Orlando Museum of Art & Chocolate Nutcracker

The Orlando/Orange County CVB's Community Relations Office disseminated the Festival of Trees press

release, the Chocolate Nutcracker press release, and through our local media communication channels, published articles in our newsletter and attended the 2009 holiday event.

Channel 13 Today's Agenda with Gary Sain Regular Tourism Spots

The Orlando/Orange County CVB tapes a monthly tourism and travel-related program, Today's Agenda, that airs on Central Florida News 13. The topics for two shows that aired the fourth quarter of 2009 were: the Orlando/Orange County CVB's 67 Days and Canada Campaigns; the Plastics Convention Big Win, the 3rd Sino-US Travel and Tourism Summit and Holiday Travel.

Martin Air Inaugural Flight

The Orlando/Orange County CVB's Community Relations Office coordinated participation of the local Red Cross and the Dutch Red Cross to bring in a group of Red Cross Dutch families and secure their hotel stay and attraction passes. The Orlando/Orange County CVB participated in a press conference at the Orlando International Airport which received Dutch media coverage for this event.

2009 Teach-In Day

Orlando/Orange County CVB Community Relations collaborated with the Orange County Public Schools Foundation to participate in Teach-In Day on an industry-wide basis. The Community Relations Manager prepared general talking points and instructions for tourism industry Teach-In Day participants and solicited industry participation through our member e-lead system and media channels. Some of the Tourism/Hospitality Industry participants for the 2009 Teach-In Day were: Mears Transportation, the Orange County History Center, and SkyVenture Orlando.

Arnold Palmer Hospital Charity Partnership for Orlando Magical Dining Month

Orlando/Orange County CVB Community Relations coordinated with the Arnold Palmer Hospital Foundation for a thank you reception with participating restaurants from the Orlando Magical Dining Month program on December 10. The Arnold Palmer Foundation was presented with an Orlando Magical Dining Month donation check of \$15,000 at the Orlando/Orange County CVB's Annual Meeting on December 11.

Government Outreach

During the fourth quarter Public Affairs successfully set up meetings between County Commissioners and staff to discuss upcoming presentations to the County Commission on December 1. In addition, Commissioners Bill Segal and Mildred Fernandez attended the Orlando/Orange County CVB Annual Meeting on December 11, 2009. We received and answered several inquiries on various subjects from County Commission staff. Gary Sain also presented to the Tourist Development Council on December 2.

TOPS Appreciation

On December 8 & 9, the Orlando/Orange County CVB held its 11th Annual Tourist Oriented Policed Sector (TOPS) Appreciation event. The objective of TOPS Appreciation is to show the 140 officers of the Tourist Oriented Policing Sector our appreciation on behalf of the hospitality community and to foster stronger relationships between the Orlando Police Department, Orange County Sheriff's Office and the Orlando/Orange County CVB. The event included the Sector 6 – Lake Buena Vista unit, Sector 5 – International Drive unit of the Orange County Sheriff's Office, Code Enforcement, Orange County Convention Center security, as well as the Orlando Police Department's International Drive sector.

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MARKETING PRODUCTS

Production

For the fourth quarter of 2009, the Publications & Interactive Services team successfully completed a total of 489 projects, which included 183 graphic requests, collateral and print type projects and 306 web-related jobs.

Included in this total were the following large projects:

- Canada Direct Marketing Campaign – 150,000 qty
- UK Fall Direct Marketing Campaign – 200,000 qty

- UK 48-page Holiday Guide – 100,000 qty
- UK Holiday Planning Pack Fulfillment Carrier Sheet – 125,000 qty
- Convention Sales 2009 Co-op Campaign - 2-page *Forbes* Magazine Insert – 650,000 qty
- Convention Sales 2010 Co-op Campaign - 24-page Magazine Insert – 486,000 qty
- 6-page Special Section for Canada Newspaper Campaign
- 11 Meeting & Convention Print Ads
- 4 Consumer Print Ads
- 2 Brand Ads for the 2009 Fall magazine campaign
- 6 Brand Ads for the 2009 Fall newspaper campaign
- 2 Co-op Ads for the 2010 Spring magazine campaign
- *Food & Wine* wraps for January, February, and March ESP (Executive Subscription Program)
- Plastics Society Promotional Collateral
- New York Media Mission Signage and Menu Books
- DC Holiday Luncheons invitations and collateral
- Publication Advertising Rate Cards
- Annual Meeting Materials

Large Web projects included:

- Win-a-Trip Contest
- UK Direct Marketing Landing Pages
- 2009 Canadian Direct Marketing Landing Pages
- Partnered with Brightcove to deliver video content on Meeting Site
- Added LIVE Blog feeds to Meeting Site
- Enhanced Consumer Site Header
- Added Social Media links to Consumer Site

Everything Ink projects included assignments for:

- United Arts: publishing the Nov/Dec 2009 & Jan/Feb 2010 issues of *Orlando Arts Magazine*
- Greater Orlando Aviation Authority: *Orlando Arts Magazine* Events Rack Card - 1st Qtr 2010
- Elite Homes: Canada Insert Ad
- AAIL Investor Conference: Step & Repeat Banner
- Florida League of Christian Schools: Program

The combined teams successfully completed more than 2,100 projects for the year, thus producing approximately 7,000 pages.

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About the Orlando CVB
Mailing Address: 6700 Forum Dr, Suite 100, Orlando, FL 32821

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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.

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