



**August 5, 2009**

### **Organizational Highlights – Second Quarter 2009**

With the economy still adversely affecting leisure and business travel in the second quarter, the industry and the Orlando/Orange County CVB have worked aggressively to maximize all opportunities. We have diligently planned to ensure that all major marketing and advertising programs are being kept intact and we have expanded on new opportunities within the social media area. These programs are helping to keep Orlando top of mind as a great value destination with leisure and business travelers.

There are still some bright spots to point out even in this tough economic climate. Brazil has continued to be a strong feeder market for Orlando. Earlier this year, we launched our first Brazilian integrated advertising campaign with all three theme parks and key tour operators. To date, we've seen more than 114,000 page views at our Brazil Web site. It's winter in the southern hemisphere and with the new direct service from TAM Airlines, our visitors from the south are finding Orlando a great place to take a winter vacation.

In April, we launched several new initiatives with our Facebook and Twitter pages. These new communications tools will provide Orlando visitors with new and interesting information and promotional opportunities. The team has launched a new worldwide campaign with our 67 Days of Smiles promotion. We will select one couple to live out an Orlando dream vacation by sampling more than 100 of Orlando's greatest attractions and experiences. These individuals will blog, tweet, vblog, Facebook and Myspace their experiences to millions of potential visitors. We have selected 10 pairs of finalists. Look for the announcement of the winners in August.

Our meetings and conventions team has been working hard to continue to attract new customers and book the ones we have already in the pipeline. We continue to aggressively travel to see our customers face-to-face. In fact, we made 225 personal sales calls in the second quarter. We recently sent out a letter from Mayor Crotty to 1,800 government meeting professionals on the virtues of Orlando for government meetings. We will also be sending a letter to the Fortune 1,000 CEOs from the Mayor on the value of Orlando for corporate meetings. In addition, I will continue to work aggressively with the U.S. Travel Association to ensure there are no hidden barriers to booking Orlando for government meetings.

I want to thank all of our members for your support during National Travel and Tourism Week in May, especially those that participated in the tourism rally in downtown Orlando. We must continue to educate the public about the positive effect tourism has on Orlando and the surrounding community. I am proud of this industry's continuing contribution to our community through employment, charitable giving, county/city taxes and support for community organizations like arts and culture. Our members and the hospitality community continue to invest in the future of our community.

Warmest regards,

Gary C. Sain  
President & CEO

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 [Industry Performance](#)

#### **Orlando CVB Activities**

 [Meetings & Conventions](#)

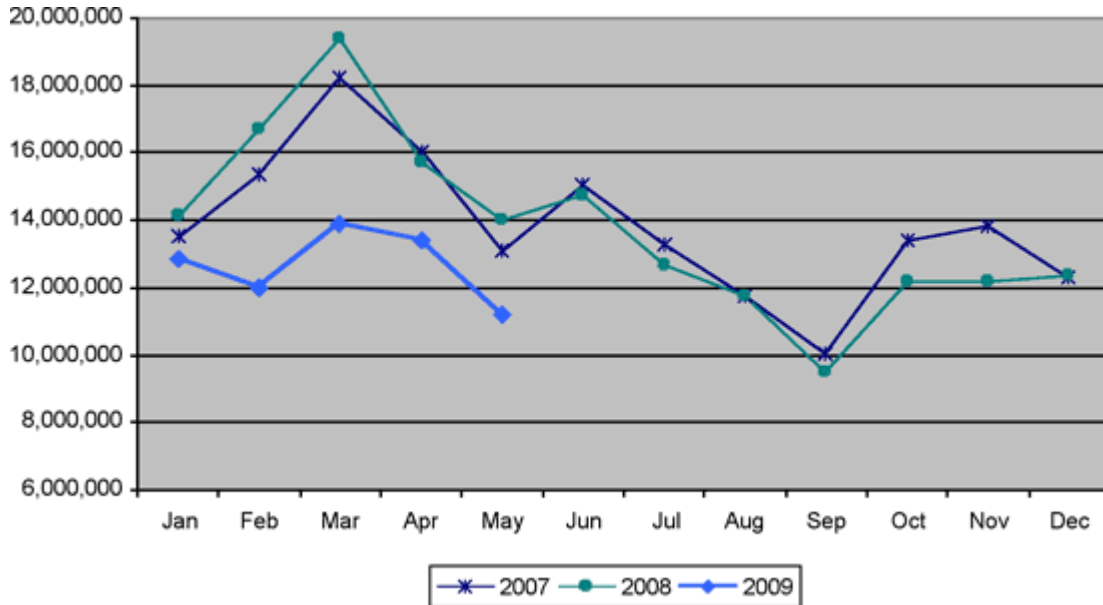
 [Leisure Marketing](#)

 [Community Relations/Public Affairs](#)

 [Marketing Products](#)

## INDUSTRY PERFORMANCE

### Orange County Tourist Development Tax Collections

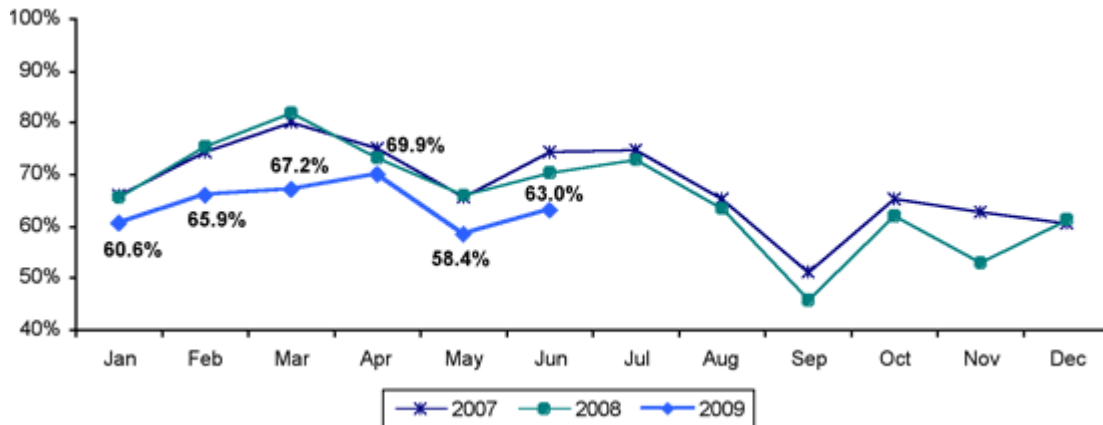


### Metro Orlando Lodging Indicators

The following results are based on the official January through May results as well as projected June results based on average daily occupancy and ADR 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

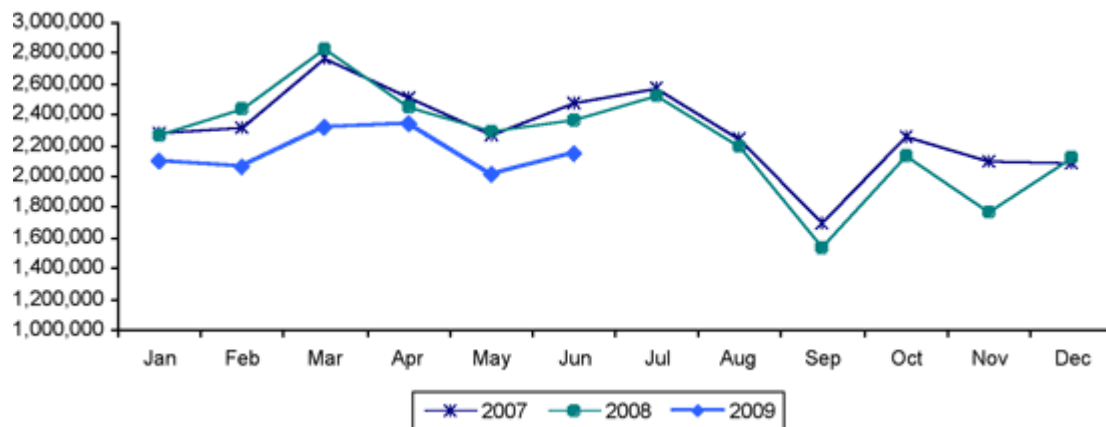
April-June	Q2 Results			Year-to-Date Results		
	2009	2008	Variance	2009	2008	Variance
<b>Metro Orlando</b>	<b>63.7%</b>	69.8%	-8.7%	<b>64.1%</b>	72.0%	-11.0%

<b>National</b>	<b>57.8%</b>	64.9%	-10.8%	<b>54.6%</b>	61.3%	-10.9%
<b>Florida</b>	<b>58.5%</b>	64.1%	-8.8%	<b>60.8%</b>	67.3%	-9.8%

### Average Daily Rate

April-June	Q2 Results			Year-to-Date Results		
	2009	2008	Variance	2009	2008	Variance
<b>Metro Orlando</b>	<b>\$95.93</b>	\$107.27	-10.6%	<b>\$101.45</b>	\$114.61	-11.5%
<b>National</b>	<b>\$97.30</b>	\$107.67	-9.6%	<b>\$98.73</b>	\$108.01	-8.6%
<b>Florida</b>	<b>\$105.66</b>	\$117.10	-9.8%	<b>\$114.96</b>	\$128.52	-10.6%

### Metro Orlando Room Night Demand



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

April-June	Q2 Results			Year-to-Date Results		
	2009	2008	Variance	2009	2008	Variance
<b>Supply<sup>1</sup></b>	<b>10,150</b>	10,203	-0.5%	<b>20,176</b>	20,358	-0.9%
<b>Demand<sup>2</sup></b>	<b>6,466</b>	7,120	-9.2%	<b>12,935</b>	14,660	-11.8%

<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

[back to top](#)

## ORLANDO CVB ACTIVITIES

### MEETINGS & CONVENTIONS

April through June was an intense travel time for the Convention Sales team, with the focus being to have as many one-on-one contacts with meeting professionals as was possible. The City-Wide Account Executives continued reaching out to planners across the country through Operation Connect with 225 face-to-face sales calls.

#### Convention Sales Performance

We continued to see the decline in leads and definite bookings primarily for the corporate market and for near-term bookings. The definite bookings for the second quarter are larger groups, and are mainly impacting future years for City-Wide business.

April-June		Comparison to Goal		Comparison to Prior year	
	Q2 2009	Q2 Goal	Variance	Q2 2008	Variance
<b>Leads</b>	552	827.5	-33%	637	-13%
<b>Definites</b>	223	n/a	n/a	278	-20%
<b>Definite Attendance</b>	554,587	439,946	26%	374,001	48%
<b>Definite Room Nights Estimated<sup>1</sup></b>	1,220,091	967,881	26%	822,802	48%
<b>Definite Room Nights Requested<sup>2</sup></b>	579,460	552,422	5%	522,215	11%

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-June		Comparison to Goal		Comparison to Prior year	
	YTD 2009	YTD Goal	Variance	YTD 2008	Variance
<b>Leads</b>	1,132	1,614.5	-30%	1,499	-24%
<b>Definites</b>	454	n/a	n/a	644	-30%
<b>Definite Attendance</b>	754,514	879,848	-14%	891,204	-15%
<b>Definite Room Nights Estimated<sup>1</sup></b>	1,659,931	1,935,666	-14%	1,960,649	-15%
<b>Definite Room Nights Requested<sup>2</sup></b>	883,482	1,104,775	-20%	1,059,193	-17%

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

New Meetings & Convention Web site activity during the second quarter included: content development, Web programming, marketing planning, gathering member data and overall strategizing for maximum success. The Web site is on target to launch in August.

Meetings-oriented copy was drafted for the *Orlando Business Journal* 25th Anniversary section with an emphasis on positioning Orlando as a key business destination. The special 40-page section is appearing in both Orlando and Washington DC editions. Also, some 7,000 overruns are being mailed to key meeting planning prospects/customers complete with a cover letter from Gary Sain.

A personalized letter from Mayor Crotty was sent to more than 1,800 government meeting professionals emphasizing the value of Orlando as a business-oriented meetings destination. The letter specifically pointed out that Orlando's government per diem rate is lower than that of Atlanta, Boston, Chicago, Las Vegas, New York and Washington DC.

At the request of the convention sales team, a colorful, attention-getting collateral piece focusing on all the new hotels, restaurants, shopping and other infrastructure was created. The piece is designed to be used as a leave-behind on sales calls.

A new advertorial was created for the summer issue of *Meeting Mentor* magazine (third of four appearing in 2009). Each advertorial presents a "success story" with an Orlando meeting planning customer who represents a different target market. This article features a corporate customer who returns annually to Orlando, and highlights the success it has had using the Orlando/Orange County CVB's customized Web site to help build its overall attendance.

Plans have moved ahead and an invitation is about to be sent for an October Medical Advisory Board meeting. This program will be a gathering of 10 to 15 of the country's largest, most successful medical meeting planners who will convene in Orlando and provide the Orlando/Orange County CVB with input on better meeting the needs of medical meeting planners like themselves.

## Events

The meetings and conventions sales team attended the following events during the second quarter:

Tradeshows/Missions/FAMS	Date	No. of Attendees / Participants	Leads Generated / Peak Rooms / Total Room Nights
New England Meetings Industry Conference & Exposition (NEMICE)	Apr. 5-9	304	Based on the state of the economy, there was an adequate number of planners to network with during the sessions. The education was good and based on the price, it was a good investment.
Springtime in the Park	Apr. 15	4,000	14 / 4,232 / 15,787
Kansas City Chapter of MPI	May 5-6	40	1 / 550 / 1,725
Meeting Spots	May 6	150	3 / 289 / 472
Society of Government Meeting Professionals (SGMP)	May 13-16	170	Focused ability to network with the Gainesville and Tallahassee members in order to strengthen relationships. Seeing our members was also a positive for attending. No RFPs were generated from this show.
Chicago Sales Mission	June 4	57	1 / 1,500 / 5,432
June FAM	June 11-14	11	The purpose was used to educate third party meeting planners on what our destination has to offer. To date, no leads were generated from this event.
Healthcare Convention & Exhibitors Association (HCEA)	June 13-16	730	This was purely a show to reconnect with some of the association client contacts. Future recommendation is for DMS to attend. No RFPs were generated from this show as planners do not attend.

Number of Meeting Client Site Visits Hosted April 1 - June 30	66
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[back to top](#)

## **LEISURE MARKETING**

The Orlando CVB completed a photo and television shoot to support the ongoing global "Smile" campaign efforts. From the television portion of the combined shoot, three thirty-second spots were produced. One focused on a theme park experience with a father and son. One spot focused on fireworks with a father, mother and young daughter. And the final spot focused on shopping with a mother and teen daughter. Shopping is an important part of the international visitors' itineraries. Combined with an existing spot produced earlier of a young girl swimming, the Orlando CVB now has four television spots that can be used globally for the next four years. Talent for the spots was chosen carefully, in terms of diversity, so that the spots can be used in multiple niche markets and countries.

In order to be efficient with time and money, the Orlando CVB shot still photographs for use in print, online and other media at the same time as the production of the television. As with the television spots, talent and photograph usage rights were negotiated for four years across the globe and all media. The photographs were shot in order to support the "Smile" campaign while also showing context of Orlando. Talent included White, African American, Hispanic, Brazilian, and Asian American models along with models that will be appropriate across multiple countries.

## **Domestic Marketing Campaign**

The integrated domestic campaign aimed at families east of the Mississippi continued with advertising, print, direct mail, outdoor, promotions, trade, publicity and online. The domestic magazine campaign kicked in with ads running from April – June (over 115 million impressions) with the Orlando Makes Me Smile messaging. Outdoor ads continued to run in Times Square with a digital board playing our TV commercial. Results to date have been good with the Web site receiving a 28% increase in traffic, more than 34,000 “Smile Cards” being downloaded, and more than 161,000 visits to the main Smile page in first half of the year.

## **Brazil Campaign Overview**

Response to the Brazil *Orlando e so Alegria (Orlando Makes Me Smile)* campaign continues to generate positive exposure for the destination despite recent negative publicity in the Brazilian media surrounding the H1N1 Flu outbreak. The Orlando/Orange County CVB, along with its campaign partners - Disney Destinations, Universal Orlando Resorts, Busch Entertainment and 8 tour operator partners – saw traffic to the campaign Web site continue to increase with a total of 114,208 total page views reported through the end of May, with 5,212 click-throughs to the tour operator partner pages and 4,869 click-throughs to the theme park pages. New ad creative now more prominently features the tour operator call to action. Media impressions generated from the television, print and online ads totaled 10.3 million through June 1.

## **Canadian Marketing Campaign**

Orlando remained top of mind for Canadians during second quarter with a scheduled flight of TV ads in Ontario spanning the entire quarter (21,458,000 impressions). In addition Orlando engaged in a co-op travel radio show with SeaWorld that aired in Toronto and Montreal during May promoting the grand opening of Manta. Year-to-date traffic to the Canada campaign splash page is up 28% over last year and Canadian visitors to the domestic Web site is up 108%. During the second quarter final visitation numbers indicated that 2008 recognized a 20% increase in visitation of Canadians to Orlando.

The hiring, in May, of an in-market Travel Trade representative, Anita Walker, immediately increased the daily activity and awareness that Orlando has among Canada’s key travel trade representatives.

## **Media Buys for Q2**

<b>Advertising Vehicle</b>	<b>Impressions</b>	<b>Description</b>
Online Advertising - Domestic	41,575,000	Google pay per click, display network and YouTube ads
Domestic Magazine	115,368,000	<i>Better Homes &amp; Gardens, Family Circle, Fitness, LHJ, Parents, More, Budget Travel, Reader’s Digest, Food &amp; Wine, Travel &amp; Leisure</i>
Domestic Outdoor	136,500,000	Digital billboard in NY Times Square
Canada TV	21,458,000	TV Co-op with partner – iTravel2000
UK/Ireland Campaign	3,439,000	Television, free standing insert, and online
Brazil Campaign	10,348,000	Newspaper, magazine and online media

## **Travel Trade**

The Orlando Travel Academy (OrlandoTravelAcademy.com) launched during May 2009. The online educational program includes content on the destination’s attractions, accommodations, dining, nightlife and shopping, among other categories. During the past three months, 1,316 travel agents have graduated from the course and 2,741 professional have visited the site. Marketing and editorial support to drive travel professionals to the training Web site includes:

- Securing the appearance of Mayor Rich Crotty, Mayor Buddy Dyer and Gary Sain on the cover of the May issue of *Travel Agent* magazine
- Six full-page ads in *Travel Agent* magazine
- Eight 1/8-page ads in the *Canadian Travel Press*
- Two weekly banners running at [travelpress.com](http://travelpress.com) and [travelagentcentral.com](http://travelagentcentral.com)
- Monthly promotional e-newsletters sent to an audience of 70,000 agents
- Monthly graduate e-newsletters

Tradeshow/Mission/FAM	Date	Location	Audience
Travel South Annual Conference	Apr. 4-8	Kissimmee, FL	150 tour operators and travel agents 50 appointments; 18 leads
Southwest Vacations Top Producers Retreat	May 12-15	Orlando, FL	50 retail agents and 50 of their guests
International Pow Wow	May 16-20	Miami, FL	1,500 international tour operators
Voyages Gendron	June 4-8	Orlando, FL	16 group tour operators & media
University of Visit Florida Canadian Fam	June 5-8	Orlando, FL	13 retail travel agents

Global

Tradeshow/Mission/FAM	Date	Location	Audience
Qwest Destinaitons Sri Lanka Fam	Apr. 19	Orlando, FL	24 travel agents
International Pow Wow	May 16-20	Miami, FL	Orlando/Orange County CVB staff participated in the industry's largest and most influential annual gathering of U.S.-based travel professionals. Event included scheduled appointments with international tour operators and media. CVB team members conducted 204 appointments with tour operators and wholesalers from 46 countries, generating 16 leads.

Latin America/Spain

Tradeshow/Mission/FAM	Date	Location	Audience
Express Brazil Fam Tour	Apr. 6-9	Orlando, FL	10 Brazilian tour operators and 1 Express escort
Active America China	Apr. 14-16	Atlanta, GA	First-ever such event held in U.S. for key Chinese tour operators and media organized by <i>North America Journeys</i> and supported by Delta Air Lines. Conducted appointments with 29 tour operators and 4 media representatives.
Visit USA Brazil Events	Apr. 14-16	São Paulo & Rio de Janeiro	Orlando/Orange County CVB participated with three members in seminars and tabletop workshops. A total of 360 travel trade contacts were in attendance in São Paulo and 208 in Rio de Janeiro.
MMT Gapnet/TAM Brazil Fam	Apr. 14-19	Orlando, FL	11 Brazilian tour operators, 1 TAM representative and 1 MMT escort
Mercatur Brazil Fam	Apr. 16-19	Orlando, FL	16 Brazilian travel agents and 1 Mercatur escort
China - U.S. Department of Commerce Fam	May 11-16	Orlando, FL	11 tour operators and 4 media representatives from Hong Kong, Beijing and Shanghai; co-hosted by the U.S. Department of Commerce Commercial Service
Viajes Liberacion Franchise Seminar	May 29	Mexico City	36 travel agents
ARLAG Trade Show	June 5	Guadalajara, Mexico	Regional trade show with an estimated travel trade attendance of 645. 4 leads

			were generated from this year's show.
Turar Seminars Argentina	June 9-10	Province of Corrientes & Posadas, Argentina	21 travel agents – Province of Corrientes; 32 travel agents - Posadas
Visit USA Seminars Mexico	June 10-11	Merida & Cancun, Mexico	78 travel agents – Merida; 43 travel agents - Cancun
UltraViajes Colombia Fam	June 19-28	Orlando, FL	1 representative of American Airlines of Medellin, Colombia along with two Ultraviajes representatives
Visit USA Seminars Mexico	June 24-25	Aguascalientes & San Luis Potosi	47 travel agents – Aguascalientes; 58 travel agents – San Luis Potosi

## Europe

Tradeshow/Mission/FAM	Date	Location	Audience
TUI Netherlands Fam	Apr. 22-24	Orlando, FL	4 TUI representatives
Neckermann Germany Fam	Apr. 30 - May 3	Orlando, FL	13 travel agents and 1 Neckermann escort
VISIT FLORIDA & Worlds of Discovery UK/Ireland Super Fam	Apr. 30 - May 3	Orlando, FL	46 travel agents; 6 representatives from VISIT FLORIDA and 1 representative from British Airways
United Kingdom Partner Meetings	Apr. 27 - May 1	United Kingdom	Jay Santos and Peter Cranis were joined by London-based team to conduct sales calls with 8 tour operator and airline partner companies to discuss programs and co-op opportunities.
IMEX	May 26-28	Frankfurt, Germany	Participated in VISIT FLORIDA booth at annual travel exhibition geared toward the international meetings and incentive client. This year's show welcomed approximately 9,000 attendees. 6 leads and 25 new MICE business contacts were generated.
Thomas Cook UK Signature Seminar	May 28	London area, UK	15 travel professionals
Chase Travel Ireland Presentation	June 3	Dublin, Ireland	25 travel professionals
American Holidays Ireland Presentation	June 4	Dublin, Ireland	30 travel professionals
Visit USA Seminar - Germany	June 17	Braunschweig, Germany	39 travel agents
Willy Scharnow Germany Fam	June 17-21	Orlando, FL	17 travel agents and 1 Willy Scharnow representative

Web Updates	Date	Location	Audience
Gay & Lesbian Page Added	Apr. 3	Orlando, FL	Travel Trade
Member offers updated	Apr. 3	Orlando, FL	Travel Trade
Orlando Travel Academy Launch - Cover & story <i>Travel Agent Magazine</i> - 2 Ads <i>Travel Agent Magazine</i>	May 11	Orlando, FL	2457 visitors to the program 2,000+ graduates through June 30 51,000 distribution 51,000 each, 102,000 total

Travel Trade Web site visits	Jan. - June	Orlando, FL	35,518
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Broadcast E-mail	Date	Location	Audience
What's New - Orlando Travel Academy	May 28	Orlando, FL	60,000 <i>Travel Agent Magazine</i> database of retail & home based travel agents
Travel Trade Newsletter w/ Member ads	June 16	Orlando, FL	80,000+ eGrams database of retail & home based travel professionals

Brochure Distribution	Date	Location	Audience
Expedia.com / Mears	Apr. 17	Tacoma, WA	75 Reservation Agents
AAA Morrow	Apr. 18	Atlanta, GA	75 Consumers / 8 AAA Counselors
Visit Florida / Travel Professionals of Color	May 14-18	Niagara Falls, NY	325 Travel Professionals
Sun Country Airlines	June 25	Mendota Heights, MN	1,000 Consumers

### Web Site

April-June	Comparison to Goal			Comparison to Prior Year	
	Q2 2009	Q2 Goal	Variance	Q2 2008	Variance
Monthly Unique Visitors*	1,242,856	960,000	29%	964,789	29%
Total Page Views*	6,552,598	6,204,150	6%	5,635,608	16%
Total Visits*	1,295,333	1,056,000	23%	1,050,043	23%
Pages Viewed Per Visit*	5.1	5.3	-5%	5.4	-6%
Time Per Visit (average minutes)*	7.4	7.0	6%	7.5	-1%
Web Site Sessions <sup>1</sup> *	1,516,136	1,410,000	8%	1,222,297	24%

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

\* During second quarter Sessions, Page Views, Visits and Time on Site were all tracking ahead of goal. Ongoing efforts in Search Engine Optimization and Search Engine Marketing continue to enhance our results. Pages Viewed per Visit were down slightly due to increases in paid traffic where users were directed to specific landing pages including the Smile pages for travel deals and offers.

January-June	Comparison to Goal			Comparison to Prior Year	
	YTD 2009	YTD Goal	Variance	YTD 2008	Variance
Monthly Unique Visitors	2,360,061	1,890,000	25%	1,783,356	32%
Total Page Views	13,266,666	12,214,450	9%	11,436,847	16%
Total Visits	2,517,398	2,079,000	21%	1,974,868	27%
Pages Viewed Per Visit	5.3	5.3	0%	5.8	-9%
Time Per Visit (average minutes)	7.1	6.9	3%	7.6	-6%
Web Site Sessions <sup>1</sup>	2,963,592	2,775,700	7%	2,314,324	28%

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

### Social Media

In the second quarter we moved forward with the creation of a Twitter page and a Facebook fan page. These platforms join existing pages on YouTube and TripAdvisor giving us the opportunity to speak to potential visitors through four of the world's most highly visited Web sites.

- **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.
- **YouTube:** Our user channel allows us to share Orlando videos on the world's most popular video sharing web site.
- **TripAdvisor:** Orlando/Orange County CVB is positioned as a Destination Expert in Trip Advisor's highly visited forums where members of our travel counselors offer their expertise by answering user questions about the destination.

April-June	Created	Q2 Fans/Followers	Q2 Videos Viewed	Q2 Forum Posts
Facebook	May 14, 2009	800	n/a	n/a
Twitter	Feb. 5, 2009	1,500	n/a	n/a
YouTube	Dec. 5, 2008	30	13,408	n/a
TripAdvisor	Sept. 30, 2008	n/a	n/a	107

January-June	Created	YTD Fans/Followers	YTD Videos Viewed	YTD Forum Posts
Facebook	May 14, 2009	800	n/a	n/a
Twitter	Feb. 5, 2009	1,500	n/a	n/a
YouTube	Dec. 5, 2008	51	24,598	n/a
TripAdvisor	Sept. 30, 2008	n/a	n/a	189

### **Strategic Alliances (Promotions)**

Below are some highlights from our second quarter activity:

April-June	Media Value	Market	Form of Media	Circulation	Impressions
<b>Sunny Delight</b> - National promotion with family-targeted juice brand	\$326,000	National U.S.	Print / Online / In-store	11,000,000	15,300,000
<b>Snyder's Of Hanover</b> - National promotion with leading pretzel brand	\$599,000	National U.S.	On-pack / Online	2,450,300	11,850,000
<b>Editoria Abril</b> - Multi-media promotion with Brazil's largest media publishing company	\$791,000	Brazil	TV / Radio / Print / Online	8,646,000	54,430,000
<b>TOTALS:</b>	<b>\$1,716,000</b>			<b>22,096,300</b>	<b>81,580,000</b>

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

### **Direct Marketing**

The Domestic direct mail campaign was sent to approximately 300,000 households which included consumers from our in-house database and from a purchased list. Families from our top lead generating cities, mainly east of the Mississippi, were targeted with the emphasis being on the cities with direct flights into the Orlando International Airport.

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. The creative provided space for three pre-formatted partner advertisements. Our participating partners were included both on the direct mail piece and the campaign landing page.

This campaign also included an e-mail version which resembled the self-mailer. The e-mail was sent to approximately 50,000 Orlando CVB opt-in email records without a physical or deliverable mailing address in an effort to collect complete or updated information.

### **Visitor Services**

April-June	Q2 2009	Q2 2008	Variance
Number of Walk-ins (Visitor Center)	27,576	26,762	3.0%
Phone Calls Received (Call Center & Visitor Center) <sup>1</sup>	12,043	14,308	-15.8%
E-mails Processed (Call Center & Visitor Center)	999	990	0.9%

January-June	YTD 2009	YTD 2008	Variance
Number of Walk-ins (Visitor Center)	50,079	49,875	0.4%
Phone Calls Received (Call Center & Visitor Center) <sup>1</sup>	25,691	30,829	-16.7%
E-mails Processed (Call Center & Visitor Center)	2,187	2,168	0.9%

<sup>1</sup> The largest decrease in phone calls received during the second quarter was in April where we saw a 26% decrease over last year. May also saw a significant reduction of a 15% decrease over last year. In comparison, June was almost flat with a reduction of only 2.7%.

[back to top](#)

## PUBLICITY

April-June	Comparison to Goal			Comparison to Prior Year	
	Q2 2009	Q2 Goal	Variance	Q2 2008	Variance
Number of Clips	1,128	444	154%	601	87%
Circulation	444,434,842	426,065,507	4%	491,683,418	-9%
Value <sup>1</sup>	\$8.9M	\$11.4M	-21%	\$15.8M	-43%

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

January-June	Comparison to Goal			Comparison to Prior Year	
	YTD 2009	YTD Goal	Variance	YTD 2008	Variance
Number of Clips	1,713	888	92%	920	86%
Circulation	1,714,413,384	852,131,014	101%	577,044,361	221%
Value <sup>1</sup>	\$30.6M	\$22.8M	34%	\$18.9M	62%

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

April-June	Q2 2009
Press Tours	Results
Orlando/Jetblue Press Trip, Apr. 13-17, Orlando, FL	Press trip for seven Colombian market media outlets included: Caracol TV (audience 5 million); <i>Portafolio</i> (circ. 42,302); Terra Networks (200,000 unique visitors); <i>El Espectador</i> Newspaper (circ. 382,000); <i>La Agencia de Viajes</i> (circ. 10,000); <i>Don Juan Magazine</i> (circ. 50,000) and <i>El Tiempo</i> (circ. 260,000). Resulting articles will run in the following sequence: <i>Caracol TV/ Programa Radar</i> , broadcasted a 15 minute program during the second quarter with an estimated ad value of \$84,603; articles in <i>Portafolio</i> , <i>Terra Networks</i> , <i>La Agencia de Viajes</i> , <i>Don Juan</i> magazine and <i>El Tiempo</i> will appear at the end of the third quarter.
Domestic Family Press	Press trip for six domestic travel journalists, along with seven children who

Trip, Apr. 22-26, Orlando, FL	represented publications including: <i>New Jersey Suburban Parent</i> (circ. 78,000); <i>Working Mother Magazine</i> (circ. 829,087); <i>Connecticut Parent Magazine</i> (circ. 60,000); Trekkertime.com; Gatehouse Media (reaches eight dailies and hundreds of weekly papers in New England; and <i>Chicago Daily Herald</i> (circ. 130,000). Coverage has already run on Trekkertime.com and in <i>New Jersey Suburban Parent</i> , additional coverage expected to run throughout the year.
Germany "Magic and More" Press Trip, May 4-9, Orlando, FL	Press trip targeting regional consumer press. Media outlets participating in the press trip were: syndicated radio (potential listenership of up to 2 million); <i>DDP news agency</i> (potential readership of up to 4 million); <i>BROWA Werbe &amp; Medienpartner Personaldienstleistungen</i> (up to 1 million) and <i>Münchener Merkur/tz</i> (circ. 450,000).
U.K. "Outdoor Adventure" Press Trip, June 9-14, Orlando, FL	Hosted four UK consumer journalists that represented: <i>The People</i> (circ. 580,815); <i>Leicester Mercury</i> (circ. 73,343); <i>Sheffield Star</i> (circ. 58,353) and <i>Derby Evening Telegraph</i> (circ. 44,986). Coverage is expected to hit this fall.

April-June	Q2 2009
PR Tradeshow/ Mission/Events	Results
Visit USA 2009, Apr. 14, Sao Paulo, Brazil	The Public Relations team distributed a press kit and a Vacation Guide to all 37 journalists present at the Visit USA Media Lunch. The media lunch provided an excellent opportunity to continue promoting the Orlando brand to the journalists, distribute Orlando information through the press kit and establish new media relationships. One on one media appointments included: <i>O Estado de São Paulo</i> (circ. 345,000); <i>Gazeta Mercantil</i> (circ. 122,000); <i>Viagem &amp; Turismo</i> (circ. 75,000); <i>Diário do Grande ABC</i> (circ. 32,500) <i>Jornal do Interior</i> (circ. 100,000); <i>Hôtelier News</i> (circ. 75,000); <i>Panrotas</i> (circ. 10,000); <i>DCI</i> (circ. 40,000); and <i>Brand News</i> (circ. 89,000).
New York Media Mission/Visit Florida Event, Apr. 27-30, New York City, New York	The first Visit Florida event focused on outdoor media and attracted 14 journalists representing publications including: <i>Big Apple Parent</i> (circ. 60,000); <i>Cigar Aficionado</i> (circ. 250,620); <i>Examiner.com</i> ; <i>Field &amp; Stream</i> (circ. 1,529,413); <i>Fodor's</i> ; <i>Outdoor Life</i> (circ. 932,708); <i>Shape</i> (circ. 1,701,023); as well as several freelance writers. The second Visit Florida hosted event was targeted to consumer media and attracted 24 attendees, including journalists representing the following publications: <i>Brides</i> ; <i>Budget Travel &amp; Girlfriends Getaway</i> (circ. 250,000); <i>Condé Nast Traveler</i> (circ. 827,503); <i>Endless Vacation</i> (circ. 1,794,458); <i>New York Daily News</i> (circ. 602,857); <i>Travel + Leisure</i> (circ. 960,147); and <i>TravelingMom.com</i> . In addition individual media appointments were conducted with <i>TravelandLeisure.com</i> (636,000 visitors per month); <i>Food Arts</i> (circ. 55,566); <i>Conde Nast Traveler</i> (circ. 827,503); <i>New York Daily News</i> (602,857); <i>AM New York</i> (circ. 323,000); <i>Rachael Ray Show</i> (more than 3 million viewers); and <i>CBS Early Show</i> (3.4 million viewers). Results of the mission included better relationships with key New York based media and coverage was secured in <i>AM New York</i> .
International Pow Wow 2009, May 16-20, Miami, FL	A total of 94 appointments were conducted with Canadian, European and Latin American journalists covering all mediums including print, online, TV and radio. More than 100 members of the worldwide press attended our 2010 Host City press conference featuring a special appearance by Mickey Mouse. The Media Marketplace at Pow Wow consisted of two sessions. Members of the team conducted one-on-one conversations with journalists during both of these sessions. During the course of the day, we were able to hand deliver press releases and pitch story ideas specific to each journalist's markets. We provided press kits to members of the media in appropriate languages.
Visit Florida Philadelphia/D.C. Media Mission, June 7-11, Philadelphia, PA, Delaware and Washington, D.C.	The meetings focused on promoting programs such as 67 Days of Smiles, Unexpected Orlando and What's New. Journalists from the meetings represented the following publications: <i>Philadelphia Daily News</i> (circ. 99,103); <i>The Philadelphia Sun</i> (circ. 20,000); <i>AAA World</i> (circ. 2,130,386); <i>Philadelphia Gay News</i> (circ. 20,000); <i>Washington Post</i> (circ. 665,383); <i>Boat US Magazine</i> (circ. 640,863); <i>National Geographic Traveler</i> (circ. 727,551) and freelance writers. As a result of the mission coverage ran in <i>The Washington Post</i> and on <i>Examiner.com</i> and is expected in <i>AAA World</i> and <i>Boat US Magazine</i> .
Florida Media Mission,	Conducted media appointments in Tampa, St. Petersburg, Sarasota and

June 22-25, Tampa, St. Petersburg, Sarasota and Bradenton, FL	Bradenton. Publications included: <i>The Tampa Tribune</i> (circ. 195,277), <i>Bradenton Herald</i> (circ. 46,475), <i>Tampa Bay Magazine</i> (circ. 35,000), <i>Florida Travel &amp; Lifestyles</i> (circ. 120,000), <i>Tampa Bay Metro Magazine</i> (circ. 30,000), <i>Tampa Bay Weddings</i> (circ. 20,000), <i>West Coast Woman</i> (circ. 30,000), <i>Senior Voice of Florida</i> (circ. 120,000) and <i>Accent on Tampa Bay</i> (circ. 40,000). Press materials were also delivered to: WWSB-TV (ABC), WFTS-TV (ABC), WTSP-TV (CBS) and WTVT-TV (FOX).
“67 Days of Smiles” Campaign Media Tour, June 24-25, Miami, FL	To increase participation from the US Hispanic market, a broadcast media tour was conducted in Miami, FL. Broadcast media outreach included: WURN Actualidad Miami 1020 AM, (audience 300) with an ad value of \$500; WSUA Caracol 1260 AM, (audience 7,100) with an ad value of \$1,200; WAMR Romance107.5 FM “Desayuno Musical”, (audience 115,360) with an ad value of \$5,200; WRTO La Kalle 98.3 FM “El Arañazo” (audience 37,570) with an ad value of \$2,000 and WCMQ Clasica 92.3 FM “Los Fonomemecos” (audience 63,900) with an ad value of \$2,500 accumulating a total radio ad value of \$11,400. TV: Telemiami “Midday News Broadcast” (audience. 3,700) with an ad value of \$1,500 and GenTV (WGEN) Channel 8 “Entre Nos” (audience 45,000) with an ad value of \$30,000 accumulating a total TV ad value of \$31,500.

Individual Press Trips to Orlando	No. of Journalists	
Apr. 1 – June 30	31	<p>Lisa Magnus, <i>Odyseey Coleur</i>  Barbara Peck, <i>Endless Vacation</i>  Lana Williamson, <i>Belleair Bee News</i>  Carol Muse Evans, <i>Birmingham Parent</i>  Jim Rankin, <i>Cross Point Magazine</i>  Sarah Elder, <i>County Press</i>  Norma Oliver, <i>Florida Gold Coast News</i>  Sarah Wyatt, <i>Fodor’s Orlando guidebook</i>  John Fine, <i>Freelancer</i>  Harold Lamar, <i>Freelancer</i>  Joseph Lieberman, <i>Freelancer</i>  Jason Rich, <i>Freelancer</i>  Chanize Thorpe, <i>Freelancer</i>  Richard Daigle, <i>Gainesville Times</i>  Trish Utter, <i>Good Life Community</i>  Eric Demps, <i>Jacksonville Jetsetter</i>  Melissa Ferris, <i>Jacksonville Luxury Living</i>  Taft Price, <i>KTUL-TV (Tulsa, OK)</i>  Norm Carl Akins, <i>NewsTalk WOLA (Ocala, FL)</i>  Walter Bowen, <i>WNSI AM (Spanish Fort, AL)</i>  David Carman, <i>WSTU 1450 AM (Stuart, FL)</i>  Griffin Miller, <i>New York Metro Parent</i>  Jason Cochran, <i>New York Post (two trips)</i>  Stacey Bomser, <i>Our City Weston</i>  Kimberly Field, <i>PBG Lifestyle</i>  Jim &amp; Barbara Twardowski, <i>QUEST</i>  Paloma Villaverde de Rico, <i>Recommend</i>  Shane Chetty, <i>Tropical Tribune</i>  Anthony Jones, <i>White Rocker News</i>  Verky Acos, <i>Latina Magazine (US Hispanic)</i></p>

[back to top](#)

## COMMUNITY RELATIONS/PUBLIC AFFAIRS

During the second quarter, members of the Orlando/Orange County CVB team presented to more than 685 attendees at a total of eleven groups including: United Arts/Red Chair Project; Tourist Development Council, City of Orlando, Leadership Orlando Class Medical City, Central Florida Chapter of Hispanic MBA’s,

Hispanic Expo 2009 Welcome Reception, Downtown Orlando Partnership, Central Florida American Marketing Association, Downtown Development Board Meeting, Voyages Gendron Travel and Beacon Awards Campaign Launch.

The Orlando/Orange County CVB met with the new marketing manager at the Enzian Theater to discuss opportunities to collaborate and the 2010 Florida Film Festival; supported the Zora Legacy Committee and hosted two meetings and one conference call for the 2010 Zora Legacy project; and attended established Arts Marketing meetings to discuss opportunities to market venues and cultural opportunities through the Orlando/Orange County CVB channels.

Central Florida News 13 airs regular tourism spots with Gary Sain called Today's Agenda. During the second quarter four shows aired on topics including: Tourist Development Tax Updates, Brazil Campaign, Spring Break, National Tourism Week, 2008 Visitation, International Pow Wow, Dwight Howard Advertisement, NE Sales Mission and Destination Blacklisting Issues.

The Orlando/Orange County CVB met with the Hispanic and Asian American Chambers of Commerce, and the Arnold Palmer Medical Center Foundation organization to discuss speaking opportunities. The Rotarian Clubs of Central Florida will be targeted to request speaking opportunities for next quarter.

As part of an annual sponsorship, the Orlando/Orange County CVB participated in the 2009 Hispanic Business and Consumer Expo, reception, networking events and ribbon cutting ceremony. The Orlando/Orange County CVB developed a Tourism Update section for the Hispanic Chamber's homepage.

The Orlando/Orange County CVB met with the Asian Chamber's new leadership to discuss opportunities and implementation of the annual sponsorship. Discussions on the publication of Orlando/Orange County CVB events on their Web site and adoption of the Tourism Update section on the chamber's homepage have begun.

### **National Travel and Tourism Week**

To support the 26th Annual National Travel and Tourism Week, the Orlando/Orange County CVB drafted a plan of activities targeted to local media, Orlando/Orange County CVB members, customs/TSA/airport personnel, elected officials, community leaders and local residents. The goal was to increase awareness about the industry and have one event each day of the week. Some highlights of the week included the I-Drive 5K Charity Race kickoff event with sponsorship recruitment, prize donations, public relations support and Orlando/Orange County CVB team member participation. A special tourism week at the Official Visitor Center with prize giveaways, special guest appearances and special values for Florida residents was created. In addition, Thank You posters were designed and posted for TSA and customs employees along with Tourism Makes Me Smile cakes being delivered to Orlando International Airport, Orlando Executive Airport and Sanford/Orlando Airport. The week culminated with a National Travel & Tourism Week Luncheon at SeaWorld Orlando's Ports of Call.

As part of the U.S. Travel Association's National Travel and Tourism Week, a "Rally Day" was created and celebrated at the Downtown Orlando Visitors Center. The rally consisted of Orlando attraction characters, Orlando/Orange County CVB members and elected officials, and was emceed by Orlando/Orange County CVB President and CEO Gary Sain. A proclamation from the City of Orlando Mayor Buddy Dyer was read proclaiming May 9-15 as National Travel and Tourism Week in Orlando. In attendance were attraction members Medieval Times Dinner and Adventure Show, Pirates Dinner Adventure and Show, Gatorland, Walt Disney World Resort, SeaWorld Orlando and Universal Orlando Resort all participating with characters or animals. Afterwards, the Orange County Commission proclaimed May 9-15 as National Travel and Tourism Week in Orange County and a photo of attraction characters with County Commissioners was taken.

More than 100 people attended the Tourism Rally with news coverage of the Rally included in the *Orlando Sentinel*, WDBO radio and on local television stations WOFL, Central Florida News 13, WFTV and WKMG. The luncheon was well attended with more than 600 members attending with media outlets from WKMG and *Florida Restaurant Magazine* also attending and covering event.

The Orlando/Orange County CVB continues to monitor the H1N1 Flu issue and coordinate with Orange County Office of Emergency Management and the Orange County Mayor's office to disseminate accurate information regarding Orlando's flu situation. When news of the virus broke, conference calls were also executed with public relations and government relations contacts from Walt Disney World Resort, Universal Orlando Resort, Worlds of Discovery theme parks and Kennedy Space Center Visitor Complex. A department representative attended Mayor Crotty's special community meeting on the topic and the Orlando/Orange County CVB subsequently posted a letter from the Mayor on the VisitOrlando.com Web site.

First quarter reporting was completed for Orange County per our new contract compliance reporting requirements. Coordinated with research and finance for the formatting and gathering of information. Research and Public Affairs created new metrics and deadlines for compliance per our new contract addendum.

To increase communications between County Commissioners and the Orlando/Orange County CVB staff, meetings are being set to have the Commissioners visit the Orlando/Orange County CVB offices and tour the facilities. To date, Commissioners Moore Russell, Stewart and Boyd have toured the offices and received an updated budget presentation. In addition Orange County Mayor Richard T. Crotty met the Orlando/Orange County CVB staff on June 8 to show his support for the important work the team does to promote the destination.

[back to top](#)

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## **MARKETING PRODUCTS**

### **Production**

For the second quarter of 2009, the Publications & Interactive Services team successfully completed a total of 461 projects, which included 206 graphic requests, collateral and print type projects and 255 web-related jobs.

Included in this total were the following large projects:

- Meeting Planners Guide 2009-2010 – 25,000 qty
- Unexpected Orlando – 100,000 qty
- Domestic Direct Marketing Campaign: Self-Mailer – 300,000 qty
- EDM Program Fulfillment Flyers Spring 2009 – 75,000 qty
- African-American Guide – 75,000 qty
- 2008 Annual Report
- Springtime in the Park pre-mailer and signage
- Medical Meetings Brochure
- Strategic Sports Council logo
- Invitations & Signage for Destination Orlando University FAM
- Menu Books (print version)
- Gift Tags & Signage for New York and Chicago Sales Missions
- Travel Agent Passport Brochure
- Invitations & Signage for MPI-WEC
- USA Today posters and direct mail with the Orlando Magic
- *Food & Wine* wraps for July, August and September ESP (Executive Subscription Program)
- *Food & Wine* ESP “Spoon” direct mail
- 14 Meeting & Convention Print Ads (4 Welcome Ads, 10 Misc marketing)
- 2 Co-op Ads for the 2009 domestic magazine campaign
- 11 Consumer Print Ads

Large Web projects included:

- Rebuild Meetings & Convention Site
- 67 Days of Smiles Campaign
- Deal of the Week Campaign

Everything Ink projects included assignments for:

- United Arts: publishing the May/June and July/Aug issues of *Orlando Arts Magazine*
- Redesigned brochure for Pegasus Transportation
- OOPSLA 2009 Ad for Association for Computer Machinery