

# The New Normal in Destination Marketing

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ORLANDO.

# Orlando Visitor Snapshot

<u>Visitor Volumes (millions)</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>08 vs 07</u>
Total	47.800	48.745	---	
Domestic	45.114	45.907	45.515	-0.9%
Leisure	34.490	35.334	35.282	-0.1%
Business	10.624	10.574	10.233	-3.2%
Overnight Conv/Group Meeting	3.959	3.782	3.488	-7.8%
International	2.686	2.838	---	
Canada	.693	.783	---	
Overseas	1.993	2.055	---	
United Kingdom	.973	.990	---	



# What's New

Waldorf-Astoria



The Hilton Orlando



The Peabody Orlando



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# What's New

Universal Orlando  
Resort



Walt Disney World



SeaWorld Orlando



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# What's New

Performing Arts Center



Florida Citrus Bowl



Events Center



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# National Travel Trends & Outlook

- Volume down 2.2% compared to last summer.
  - Previous summers have been flat – so this summer may rank among the worst in many years
- Leisure travel may improve only slightly in the last half of 2009 and gains seen in 2010 will not be enough to offset the losses in summer 2009.
- Greater strength in drive than in air market as gas prices are half of what they were last July and air travel costs down a more moderate 4.1% through March.



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Source: Summer 2009 Outlook, U.S. Travel Association

# National Travel Trends & Outlook

- Americans cutting back on spending, taking fewer trips, reducing both the distance and duration of trips, and traveling closer to home
- A fourth of U.S. adults expect to spend less this summer on their leisure trips compared with summer 2008 and the majority are reducing both distance traveled and number of nights spent away from home.
- Compared to last year, Americans plan to take more day trips or long weekend getaways in lieu of the weeklong vacation.



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Source: Summer 2009 Outlook, U.S. Travel Association

# National Travel Trends & Outlook

- Great travel deals may be sufficient to entice Americans to travel, especially at the last minute.
  - TravelHorizons™ quarterly survey by US Travel & YPartnership revealed that 45 percent of intended summer leisure travelers will plan their trip – and 39% will book it – within two months or less of departure



# National Meetings & Conventions

- In 2008, the exhibition industry experienced its first decline since 2002, decreasing 3.1% versus 2007, according to *The CEIR Index* by The Center for Exhibition Industry Research (CEIR).
- The CEIR Index found the number of attendees for the overall exhibition industry declined 4.0% in 2008 versus 2007, after increasing each year since 2004



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Source: The CEIR Index, The Center for Exhibition Industry Research

# National Meetings & Conventions

- With the 2008 year-over-year contraction of the exhibition industry linked to the recessionary economy, all indications point to continued declines for the industry in 2009, as the economy is not expected to recover until the second half of 2009 or first quarter of 2010.
- Using the industry's recovery following 2001, and with economic forecasts predicting a second half 2009 recovery for the U.S. economy, the exhibition industry overall may not see growth until the second quarter of 2010 and possibly later.



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Source: The CEIR Index, The Center for Exhibition Industry Research

# National Meetings & Conventions

- Regardless of the timing of an economic recovery, two of the most prominent challenges facing the industry are:
  - the role/importance of live events to young professionals and the next generation of workers
  - the impact of the Internet and virtual events



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Source: The CEIR Index, The Center for Exhibition Industry Research

# Key Lodging Markets

March 2009 versus prior year

:

Market	Occupancy Rate		Average Daily Rate	
	2009	% Change	2009	% Change
New York, NY	64.7%	-15.5%	\$195.10	-18.9%
Atlanta, GA	52.1%	-15.0%	\$87.51	-6.2%
Chicago, IL	45.9%	-14.0%	\$103.27	-10.4%
Los Angeles-Long Beach, CA	62.1%	-13.7%	\$118.38	-8.4%
Boston, MA	47.5%	-13.4%	\$126.15	-8.2%
San Diego, CA	59.4%	-13.2%	\$125.88	-8.9%
Orlando, FL	64.5%	-13.1%	\$106.91	-11.9%
Anaheim-Santa Ana, CA	60.2%	-12.8%	\$114.53	-8.5%
Las Vegas, NV*	80.6%	-8.3%	\$98.48	-25.3%
Philadelphia, PA	53.6%	-9.1%	\$110.60	-7.6%
Norfolk-Virginia Beach, VA	43.3%	-4.5%	\$70.50	-3.3%
Washington, DC	59.1%	-3.1%	\$161.85	6.4%
<b>Top 25 Markets</b>	<b>56.9%</b>	<b>-11.9%</b>	<b>\$120.98</b>	<b>-8.9%</b>
<b>Total U.S.</b>	<b>51.4%</b>	<b>-10.9%</b>	<b>\$100.13</b>	<b>-7.7%</b>



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\* Las Vegas does not report to STR – numbers reported are from LVCVA Executive Summary for March 2009  
Source: Smith Travel Research

# U.S. Travel Association Travelhorizons Survey

**The good news:** 65% of U.S. adults expect to travel for leisure purposes between now and October 2009. This represents an increase of nearly five percentage points from leisure travel intentions measured in the April 2008 survey.



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# U.S. Travel Association Travelhorizons Survey

**How likely are you to visit the following destinations in the next year.** (Top 3 Box on a 10 point scale)

May 2009

	<b>Total</b>	<b>Travel with Children</b>
Orlando, FL	<b>18%</b>	<b>25%</b>
New York City, NY	<b>17%</b>	<b>18%</b>
Las Vegas, NV	<b>15%</b>	<b>15%</b>
Washington DC	<b>14%</b>	<b>17%</b>
Los Angeles – Anaheim, CA	<b>14%</b>	<b>14%</b>
San Francisco, CA	<b>12%</b>	<b>12%</b>
Myrtle Beach, SC	<b>11%</b>	<b>13%</b>
Atlanta, GA	<b>10%</b>	<b>11%</b>
Nashville, TN	<b>10%</b>	<b>10%</b>
Williamsburg, VA	<b>7%</b>	<b>11%</b>



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# U.S. Travel Association Travelhorizons Survey

**Reasons for Never Having Been to Orlando and/or Not Visiting Orlando Within  
Next Two Years. (multiple response)**

**May 2009**

Economic conditions	34%
Too expensive	33%
Been before and want to go somewhere different	28%
Too Crowded	28%
Too Commercialized	20%
Isn't easy to get there/too far away	18%
Doesn't have activities I'm interested in	15%
Not a place to relax	15%
Just a place for families with kids/not enough adult activities	10%
Concerned about gas prices	9%
My kids not the right age	8%
Weather	4%
It's unsafe	1%



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# Where People Want to Go

<b>Extremely/Very Interested in Visiting during the next two years:*</b>	<b>2008</b>
Hawaiian Neighbor Islands (i.e. Maui, Kauai, etc.)	64%
National parks (i.e. Grand Canyon, Yellowstone, etc.)	62%
Honolulu, Hawaii	60%
The Florida Keys	45%
Orlando, FL	42%
New York City, NY	41%
San Francisco, CA	40%
San Diego, CA	39%
Las Vegas	37%
Lake Tahoe (California & Nevada)	35%



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\*Top two box on a 5 point scale

Ypartnership/Yankelovich, Inc. 2008 National Leisure Travel MONITOR

# Orlando

## 2009 Key Drivers

- Stronger retail (value) message while staying true to brand
- Grow targeted international opportunities
- Increase new meetings and conventions opportunities
- Increase medical/healthcare/bio and meetings & conventions
- Increase co-op opportunities (domestic and international)
- Continue diversity marketing initiative



# Messaging

## Global Leisure



### Key Messages

Value

Affordability

Accessibility

Hospitality

## Global Meetings



### Key Messages

Orlando is a serious business destination

Innovative

Affordability

Accessibility

Creativity



# Branding



Where Relationships Thrive





# ORLANDO MAKES ME SMILE<sup>SM</sup>





# Leisure Marketing

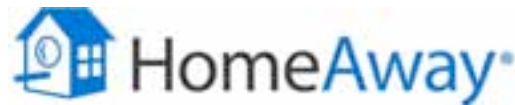
ORLANDO

# Domestic Smile Campaign



# Smile Campaign Advertising

Second Quarter



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# Twitter and Facebook

**Hey there! VisitOrlando is using Twitter.**  
Twitter is a free service that lets you keep in touch with people through the exchange of quick, frequent answers to one simple question: What are you doing? **Join today** to start receiving **VisitOrlando's** updates.

**facebook** Home Profile Friends Inbox Settings Logout Search

**Visit Orlando**  
Wall Info Photos Videos Games to Win Follow us on...  
What's on your mind?  
Visit Orlando + Fans Just Visit Orlando Just Fans Settings

**Visit Orlando** Don't miss Orlando's Fringe Festival (longest running US Fringe festival) - eclectic, edgy & untraditional theater - May 24-25.  
**FRINGE FESTIVAL** Orlando Arts & Culture - Orlando Events - VisitOrlando.com - Orlando International Fringe Theatre Festival  
The Fringe will once again light up at the theater - eclectic, edgy and untraditional. It's a 12-day festival that is founded on the concept of offering 100 percent unscripted and ...  
11 likes · Comment · Like · Share  
You like this.  
Write a comment...

**Visit Orlando** Did you know you can also follow Orlando on YouTube?  
**YouTube - OrlandoOrlando's Channel**  
Source: www.youtube.com  
An Orlando vacation guide often more useful than any destination, as we created this channel to share how Orlando makes people smile...  
11 likes · Comment · Like · Share

**Visit Orlando** Disney announces dates for 14th annual Epcot International Food & Wine Festival.  
**Epcot's International Food & Wine Festival**  
Source: disneyworld.disney.go.com  
The Epcot International Food & Wine Festival is an outdoor special event that transforms Epcot theme park into a food and wine lover's paradise.  
10 likes · Comment · Like · Share

**VisitOrlando**  
It's the final two weeks of **MUCH ADO and MERCHANT** at Orlando Shakespeare Theatre. Don't miss these great shows! <http://ow.ly/3mry>

**ORLANDO MAKES ME SMILE**

Name Visit Orlando  
Location Orlando  
Web <http://ow.ly>  
Bio Official Orlando CVB about attractions, restaurants, a special event  
79 Following 55 Fans  
We are the Official website of the Orlando Convention & Visitors Bureau with information about attractions, hotels, restaurants, shopping, deals, special events and more.

**Updates** 2 of 3 videos See All

**Favorites**

**Orlando Makes Me Smile**  
9:26 Added about 2 months ago

**An Orlando Vacation Has Something for Everyone**  
1:58 Added about 2 months ago

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# 67 Days

The screenshot shows a Facebook page for '67 Days of Smiles'. The page header includes navigation links for Home, Profile, Friends, Inbox, Settings, and Logout, along with a search bar. The main profile picture is an orange square with the text '67 DAYS OF SMILES' and a white smiley face, with 'in ORLANDO' below it. The page description states: '67 Days of Smiles Orlando is searching for The World's Greatest Smiles. If you've got what it takes, go to <http://www.visitorlando.com/67daysofsmiles> to learn how to enter.' Below the description are tabs for Wall, Info, Photos, Discussions, and Boxes. A 'What's on your mind?' text box with a 'Share' button is visible. The page shows '67 Days of Smiles + 7 Fans' and 'Just 67 Days of Smiles Just Fans' buttons, along with a 'Settings' link. On the left sidebar, there are options to 'Edit Page', 'Send an Update to Fans', 'Add Admins', and 'Add to my Page's Favorites'. A text box reads: 'Orlando has launched a worldwide search for an adventurous pair with great smiles. Their assignment -- to experience every attraction in Orlando over the course of 67 consecutive days and share their daily adventures! Do you have what it takes?'. Below this is a 'Fans' section showing '1 fan' and a 'See all' link. The main content area features a post with the text: '67 Days of Smiles It would take 67 days to experience all of the Attractions & Activities Orlando has to offer.' This post includes three photos: a person in a blue costume, a tall tower, and a roller coaster. Below the photos is the text 'Attractions & Activities' and '18 new photos'. The post is dated '5 seconds ago' and has 'Comment', 'Like', and 'Share' options. A second post below it repeats the search information: '67 Days of Smiles Orlando is searching for The World's Greatest Smiles. If you've got what it takes, go to <http://www.visitorlando.com/67daysofsmiles> to learn how to enter.' This post is dated 'Yesterday at 11:34am' and has 'Comment' and 'Like' options.



# Smile Campaign Publicity Results



THE WALL STREET  
JOURNAL.

Chicago Tribune

The Miami Herald

THE  
TAMPA  
TRIBUNE  
LIFE. PRINTED DAILY.

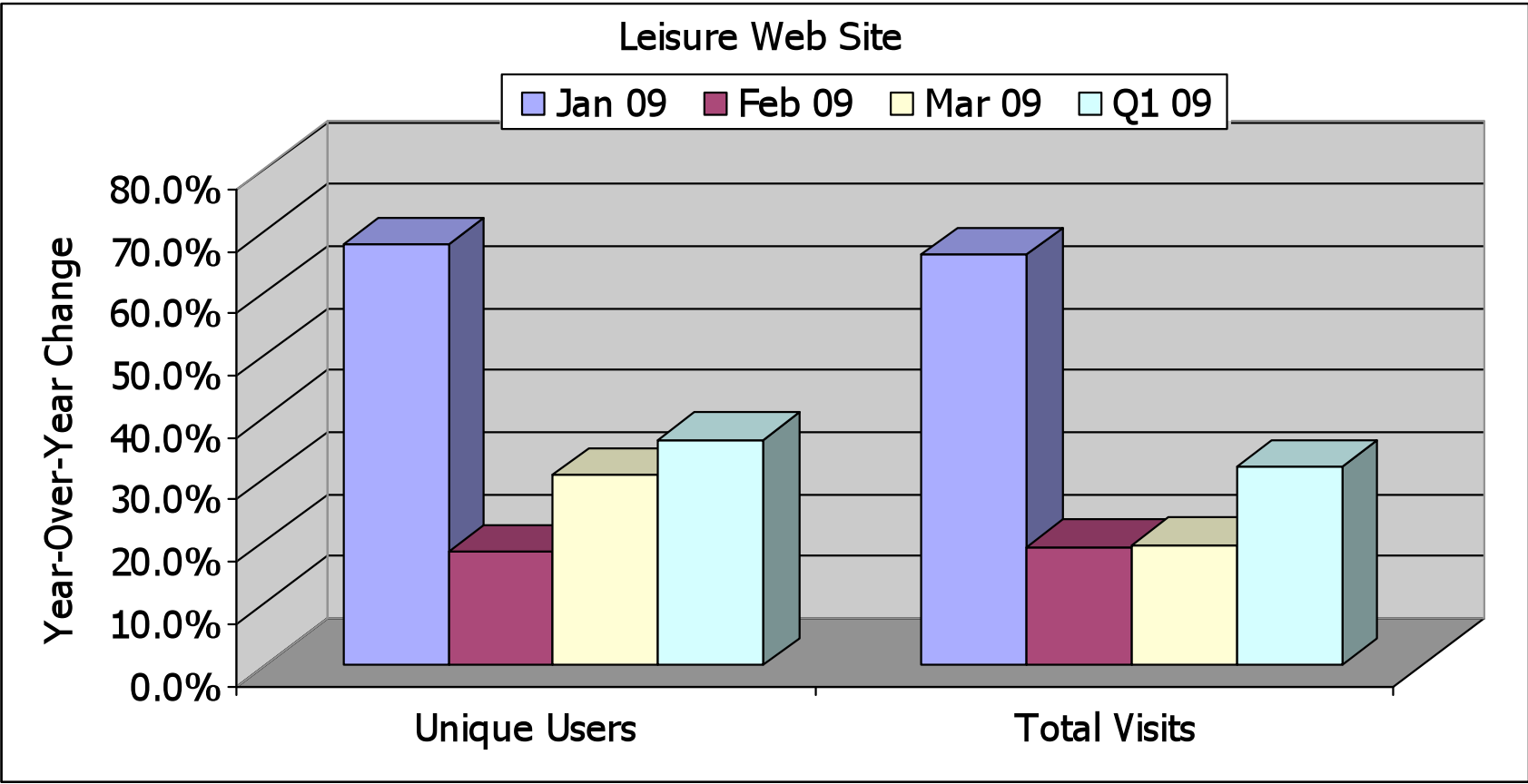
CNN.com.

 msnbc.com



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# Campaign Results



# International Focus



# Orlando Makes Me Smile

ORLANDO  
ME HACE FELIZ™

Spanish

ORLANDO  
É SÓ ALEGRIA!™

Portuguese

ORLANDO  
SOURIS À LA VIE!™

French



# ORLANDO É SÓ ALEGRIA!™



The screenshot shows the Orlando website interface. At the top, the 'ORLANDO' logo is in orange, followed by 'É SÓ ALEGRIA!™' in blue. Below the logo, there's a navigation bar with categories like 'Eventos', 'Compras e Restaurantes', 'Atracões e Esportes', 'Atracões para Crianças', and 'Compras de Varejo'. The main content area features a large image of a family enjoying a roller coaster. A prominent blue banner reads 'Aproveite as melhores ofertas - Clique aqui, ORLANDO É SÓ ALEGRIA!™'. To the right, there's a vertical 'SeaWorld' logo and a 'www.SeaWorld.com' link. The bottom of the page includes social media icons and a footer with contact information.



A photograph of a family of four (a woman, a man, and two children) riding a roller coaster. They are all smiling and shouting with excitement. The background shows the blue sky and the structure of the coaster.

Economizando dinheiro em minhas férias em Orlando

Gatando nas montanhas-risetas

**Clique aqui e veja as ofertas**

Viva as suas férias de cabeça para baixo, com uma viagem para Orlando. Comece a planejar a sua viagem com muita emoção e economia.

# ORLANDO É SÓ ALEGRIA!™

**Clique aqui e veja as ofertas**



ORLANDO.

INTERNATIONAL POWWOW

MAY 15-19, 2010



U.S. TRAVEL  
ASSOCIATION



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# Meetings & Conventions

# Meetings Mean Business

## Want to lose one million more jobs? Just keep talking.

All Americans are angry at the recent revelations of bad judgment and excess by some corporate leaders - especially when the result is a taxpayer-funded clean up.

However, targeting business meetings and events is the wrong answer.

With their political rhetoric and short-sighted legislation, Congress is sending a message to TARP recipients and every other business that Congress doesn't want those meetings to happen. The results are predictable. Thousands of companies - not just TARP recipients - are cancelling their meetings out of fear.

**For every meeting that is cancelled, jobs are lost - it's that simple - and it's happening all across the country. 1 out of every 8 jobs in this country is linked to travel and tourism - and those Americans will be even angrier if they lose their job because of political rhetoric.**

The overwhelming majority of business meetings are not for senior executives - they are for top salespeople, high performing employees and valued customers and business partners. Business gets done and companies grow because of these meetings and events.

We've released a code of conduct for companies using taxpayer dollars. We encourage Congress and Treasury to embrace these standards - and stop the rhetoric. Visit our website for more details - [www.meetingsmeanbusiness.com](http://www.meetingsmeanbusiness.com).

**MEETINGS  
MEAN  
BUSINESS.**



**U.S. TRAVEL  
ASSOCIATION**



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# President Obama Engages



**White House Says It Encourages Business Travel**



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Source: U.S. Travel Association

# 2009 Meeting Incentive



Meetings Incentive Package  
With Value Adds from:



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# #1 Medical Meetings Destination for Last 12 Years



# Medical Meetings Destinations

- Orlando hosted more medical events in 2008 than any other city.
  - Every 5 days, Orlando hosted a new healthcare meeting.
- Over the last 12 years, Orlando has averaged more medical events per year than any other destination.

## Top Destinations for Medical Meetings, 2008

1	Orlando
2	Chicago
3	San Diego
4	Washington, DC
5	Las Vegas
6	Boston
7	San Antonio
8 (tie)	San Francisco
8 (tie)	Phoenix
10	New Orleans



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Nemours  
Children's  
Hospital

2

Veteran's  
Affairs  
Medical  
Center

3

SR 417

Lake Nona Blvd.

Town  
Center

1

4

UCF College  
of Medicine

5

Burnham  
Institute for  
Medical  
Research

# Strategic Medical Leadership Council



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American Optometric Association  
American Pet Products Association

National Association of Home Builders  
National Basketball Association

# Operation Connect

American Society of Health-System Pharmacists  
American Society of Plastic Surgeons  
American Society of Training and Development  
American Sociological Association  
American Speech Language and Hearing Association  
American Sportfishing Association  
American Urological Association  
American Wind Energy

National Marine Manufactures  
National School Boards Association  
National School Supply & Equipment Association  
National Science Teachers Association  
National Wood Flooring Association  
NBAA  
North American Association of Food Equipment  
North American Christian Convention



Church of God International Women's Ministries  
Church of God Ministries

ServiceMaster Clean  
SHOT Show

# Telemarketing Campaign

UNIVERSITY  
OF CENTRAL FLORIDA



ROSEN  
COLLEGE

HOSPITALITY MANAGEMENT



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# Community Initiatives



**AIRTEAM ORLANDO**

# Strategic Sports Council



CITY OF ORLANDO



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