FY10/11
Sales & Marketing Plan
UK, Ireland & Scandinavia

The primary focus for the UK Office is to continue to capitalise on the huge number of UK visitors travelling to Orlando and work on persuading them to come to our beach. Our key priority for the last two years has been to increase market share of UK visitors to Orlando and statistics to the end of 2009 show that we have grown this market share from 68% to 71%. The key continues to be ensuring that St Petersburg/Clearwater appeals to as wide an audience as possible ie families with young children, families with teenage children, younger couples and older couples.

We need to move with the times and understand how the industry is changing with a shift to more consumer direct, the impact of social media, the increasing use of the internet to plan and book holidays, the need to maximise ROI and the importance of leveraging industry partnerships. Whilst a large percentage of our activity is targeted towards the consumer, either via our tour operator co-ops or via national brand promotions, we cannot forget the trade. The trade continues to be an integral part of the distribution channels as well as influencing consumers on where to go and what to do, especially if the trade has firsthand knowledge of the destination.

The message in working with the trade and consumer has been and will continue to be:

- the proximity to Orlando
- the fact we provide something for everybody
- the great diversity of activities
- the area can be as busy or relaxing as you want it to be
- the simplicity of the great beaches
- the value for money
- the friendliness of the destination.

Our aim remains to convert every possible UK, Irish and Scandinavian visitor coming to Orlando to also come to St. Petersburg/Clearwater and until this happens we have not fulfilled our potential. Based on 2009 figures, we received 29% fewer UK visitors than Orlando or nearly 244,000 UK visitors and that is primarily who we need to convert. We will also continue to heavily target repeat visitors to Florida who are inclined to spend less time in central Florida and more time exploring other regions.

UK Economic Environment

While UK consumers are becoming more confident, this confidence is not leading to a return to the free-spending ways of pre-recession days. Spending intentions continue to lag behind gains in consumer confidence. High unemployment rates and low wage and salary increases will result in consumer spending growing by less than 1 percent in 2010. The pound continues to strengthen against the US dollar and the Euro but not by a margin that would entice UK consumers to rush out and buy a ticket to a sunny destination.

UK outbound travel has been severely impacted by the global economic crisis and fell for the eighteenth consecutive month in January 2010. Visits to North America fell by 15.1 percent while outbound visits within Europe declined by 16.4 percent. In January 2010 UK residents made 12.5 percent fewer outbound visits, however the good news is that the rate of decline was not as severe as during January 2009 when outbound visits fell by 17.3 percent.

Background statistics

2009 Visitor arrival figures to the US:

UK	Total 3,899,167	14.6% down
Ireland	Total 411,023	22.6% down
Sweden	Total 324,417	18% down
Norway	Total 193,318	9.7% down
Finland	Total 114,364	3.5% down

- In 2009 UK visits to Orlando numbered approximately 840,000 a decrease of 19.4% over 2008.

- In 2009 UK visits to Pinellas County numbered 595,776 a decrease of 6.7%. This is a substantially smaller decrease than experienced by Orlando and represents a good increase in market share of UK visitors to central Florida. **It also means that approximately 71% of UK visitors to Orlando also came to St. Petersburg / Clearwater.**

- UK visitors to Pinellas County represented a 62.5% share of all European visits in 2009.

Forecasts

UK Carriers delivered 19.3% fewer seats to Orlando/Sanford in 2009. This fall in capacity was a result of the collapse of XL Airways in September 2008 followed by Fly Globespan's demise in December 2009. Charter carriers also trimmed capacity during the year in response to a decline in travel demand.

UK carriers delivered 25.4% fewer passengers into Orlando/Sanford during the first two months of 2010. The number of charter passengers fell by 8.3% while passengers on scheduled carriers fell by 26.5%. The failure of Fly Globespan in 2009 has contributed to the decline in passengers delivered by scheduled carriers during January and February 2010.

Direct seat capacity is expected to fall a further 8.4 percent in 2010 or by 72,870 seats. An estimated 94% of UK visits to Orlando are made via direct flights. If 94% of UK visits to Orlando arrive directly and 6% arrive indirectly, Orlando would be on track to record about 774,000 visits in 2010. It is hoped however, despite this fall in capacity, that the opening of Harry Potter at Universal Orlando Resort will generate increased interest and impact numbers to the destination particularly as central Florida has not had a major opening for some time.

Primary sales goals for FY10/11

The combination of all these factors make this a very difficult climate, however this challenge is extremely motivating! The challenge is to be as creative as possible in the sales and marketing that we do and make best use of the partnerships available to us in order to leverage and maximise budgets. The primary goals are:

- To maintain and increase visitation to St. Petersburg/Clearwater by UK, Irish and Nordic visitors and maximise their length of stay and spending in-resort.
- To leverage partnerships and budgets with tour operators and Florida partners to target, appeal and reach as wide an audience as possible in the most cost effective way.
- Position St. Petersburg/Clearwater as a destination with fantastic beaches within close proximity to Orlando appealing to families and couples of all ages.

Strategies to achieve the goals

- Initiate major national consumer promotions with major UK brands
- Initiate major co-op marketing campaigns with tour operators such as Virgin Holidays, Travel City Direct, Expedia, Trailfinders, Funway, Lotus, TUI, American Holidays and Tour America including national press, direct marketing to their client database and online.
- Attendance at World Travel Market in London and heightened profile via sponsorship of the coat check areas.
- Attendance at consumer shows in Ireland and Scandinavia.
- Ongoing tour operator sales calls and training in UK, Ireland and Scandinavia to maximise product inclusion and room night sales
- Close liaison with Orlando Tourism, Visit Florida, Busch Gardens, Tampa Bay & Co and other Florida suppliers as well as airlines to co-op on budgets where possible and align ourselves with credible partners
- Tour operator VIP special event in conjunction with Busch Gardens
- National retail agent in-store promotion with TUI, Virgin Holidays retail stores and Premier Holidays retail stores to include training and incentivising of the agents
- Dedicated travel agent fam trip
- Maintenance of the Visit St Petersburg/Clearwater Travel UNI training programme for travel agents launched in the current fiscal year aiming to have 700 agents signed up within 12 months