

Drawn Together

2018-2019 Sales & Marketing Plan



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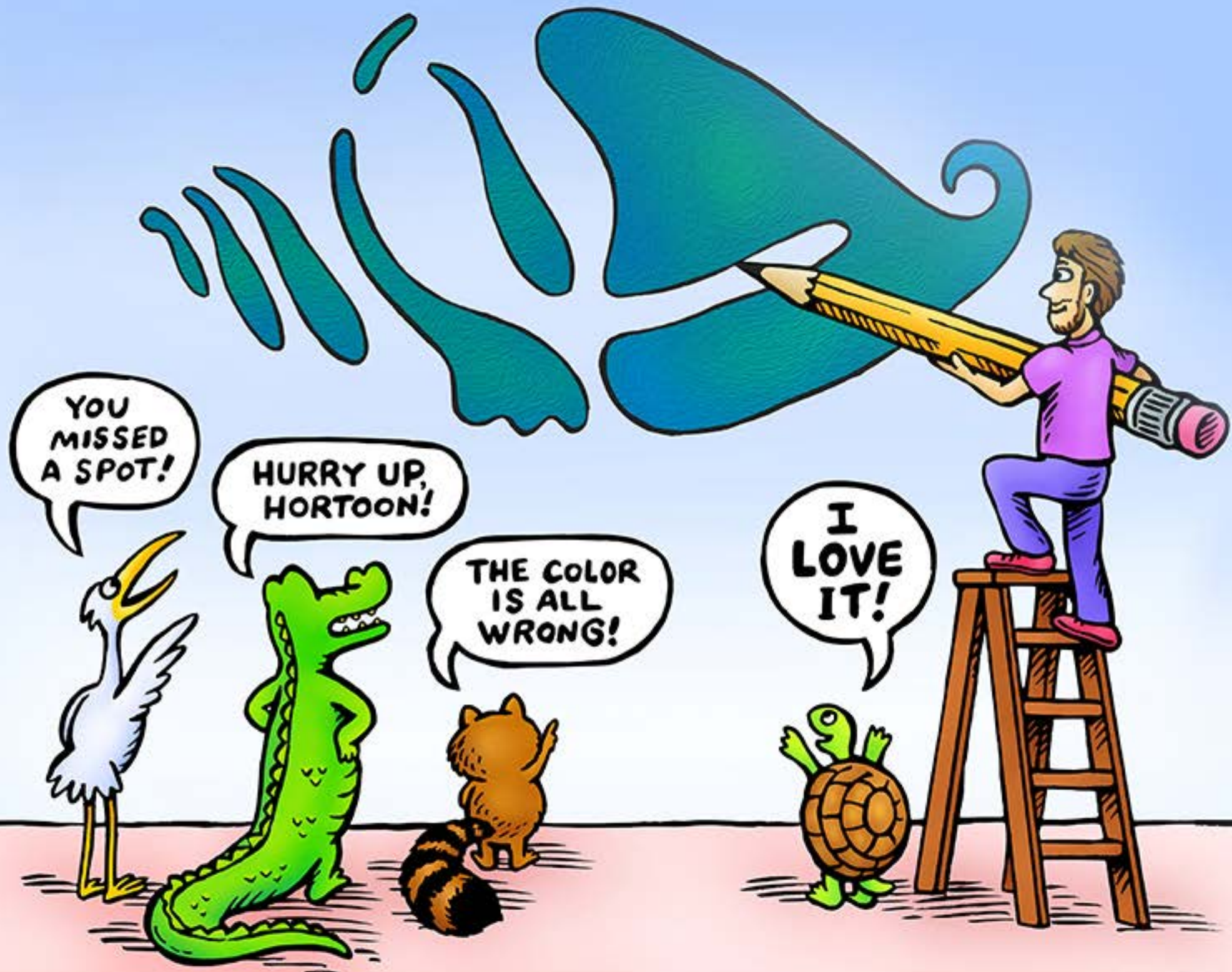
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A Part of the Picture

VCB Introduction



Dear industry partners,

I am proud to present the 2018–2019 Sales & Marketing Plan alongside my team at the Lee County Visitor & Convention Bureau, a passionate group of tourism professionals who work diligently to promote our community every single day.

Despite the water crisis this summer, 2017–2018 proved to be another record year for the destination. Annual bed tax collections totaled \$42.1 million, an increase of 5.9 percent year-over-year, and with more than 9.2 million passengers served in the fiscal year, the airport had the most traffic in its 35-year history.

The weeks and months ahead certainly present some challenges, starting with FY 2018–19 first-quarter results (Oct.–Dec.) that will not include rooms booked by hurricane evacuees and post-hurricane crews. Also, we ALL have to work very hard to highlight improved coastal conditions by consistently sharing positive images of our area.

However, there are reasons to remain optimistic. The 2019 Farmers' Almanac indicates, "Winter is coming! It's going to be a teeth-chattering cold one, with plenty of snow." The Suncoast Credit Union Arena at Florida SouthWestern State College hosts the inaugural Fort Myers Tip-Off Nov. 19 & 21, featuring NCAA men's basketball teams from Boston College, Loyola University Chicago, Richmond and Wyoming. Spring training has us welcoming back both the Minnesota Twins and 2018 World Series Champion Boston Red Sox. And our focus next fall will be on using the 2019 Hobie 16 Worlds to showcase our area internationally with an event that hasn't taken place in the U.S. since 1984.

Since we know water quality is top of mind for everyone this year, we have included an overview of our post-red tide response as a separate section of the plan, beginning on Page 74. Mother Nature had her way, but with one common vision and purposeful collaboration as destination partners, we are confident in our ability to remain competitive. That positive outlook and belief in the power of cohesive teamwork is reflected in the theme of our 2018 annual meeting — Drawn Together.

Thank you for being the best brand ambassadors a destination could ever hope for! I look forward to working closely with each of you to make the upcoming year our most remarkable one yet.

Warm regards,

A handwritten signature in black ink that reads "Tamara Pigott". The signature is written in a cursive, flowing style.

Tamara Pigott
Executive Director

Mission

To serve the broader social and economic interests of Lee County by marketing the destination, facilitating travel to the area, and showcasing its unique attributes for the continual benefit of residents and the travel and tourism industry.



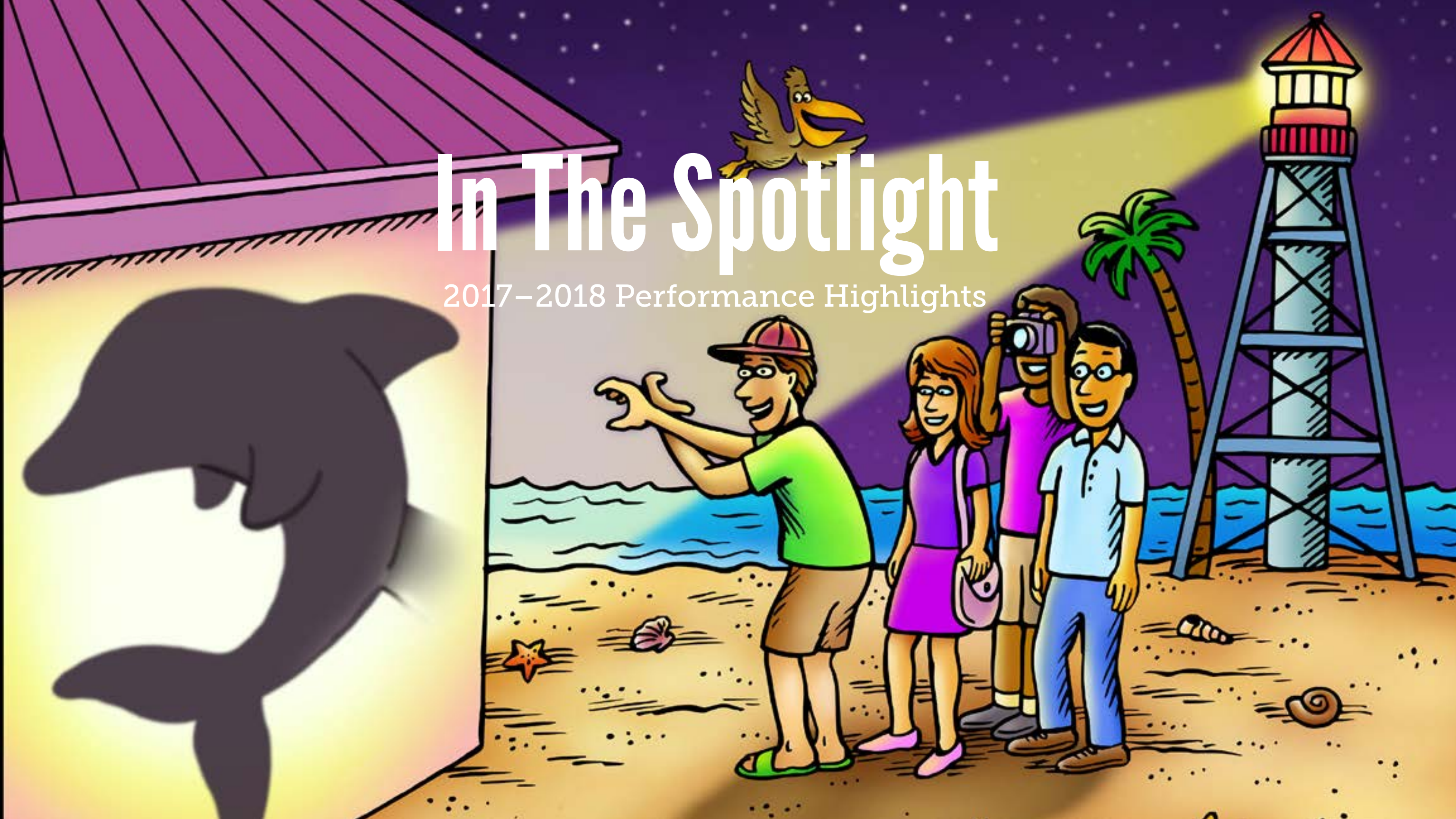


Vision

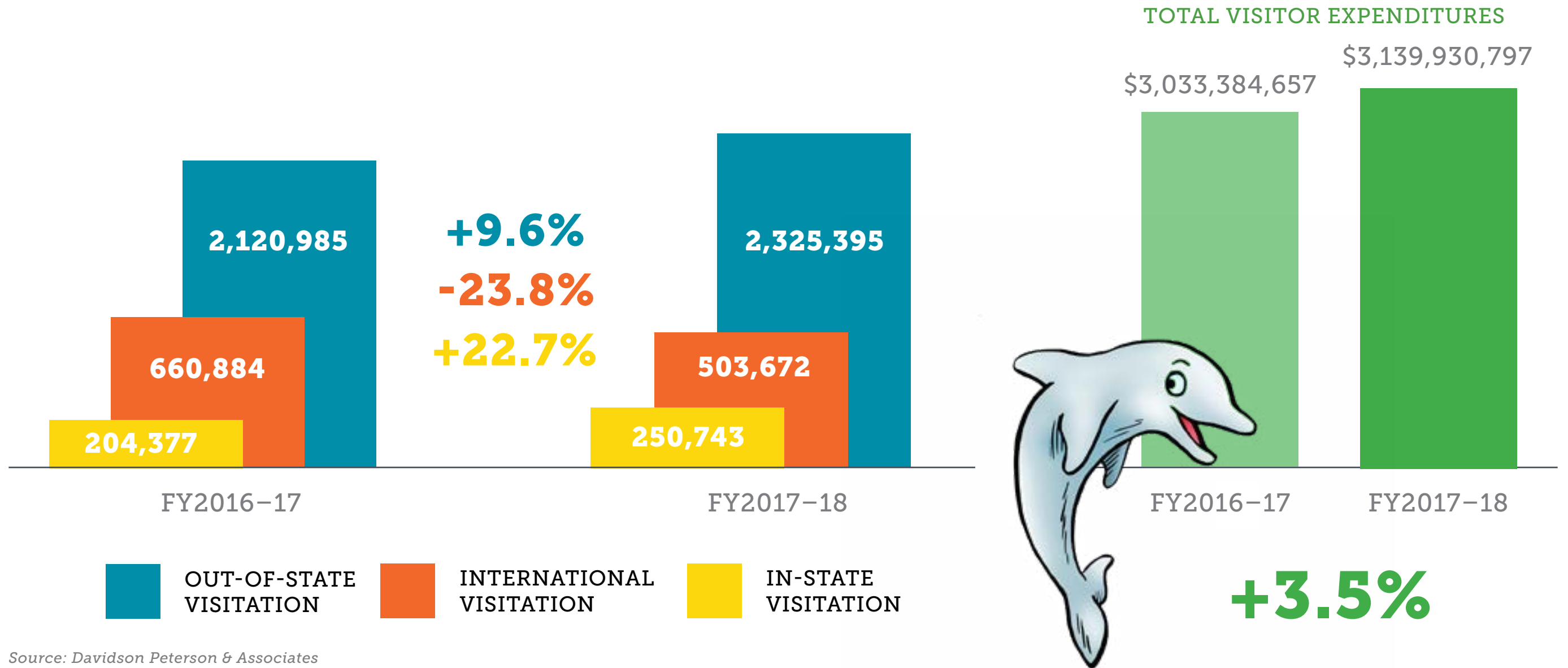
To continue to build Lee County's reputation as one of the most naturally beautiful and sought-after tourism destinations in the world.

In The Spotlight

2017–2018 Performance Highlights

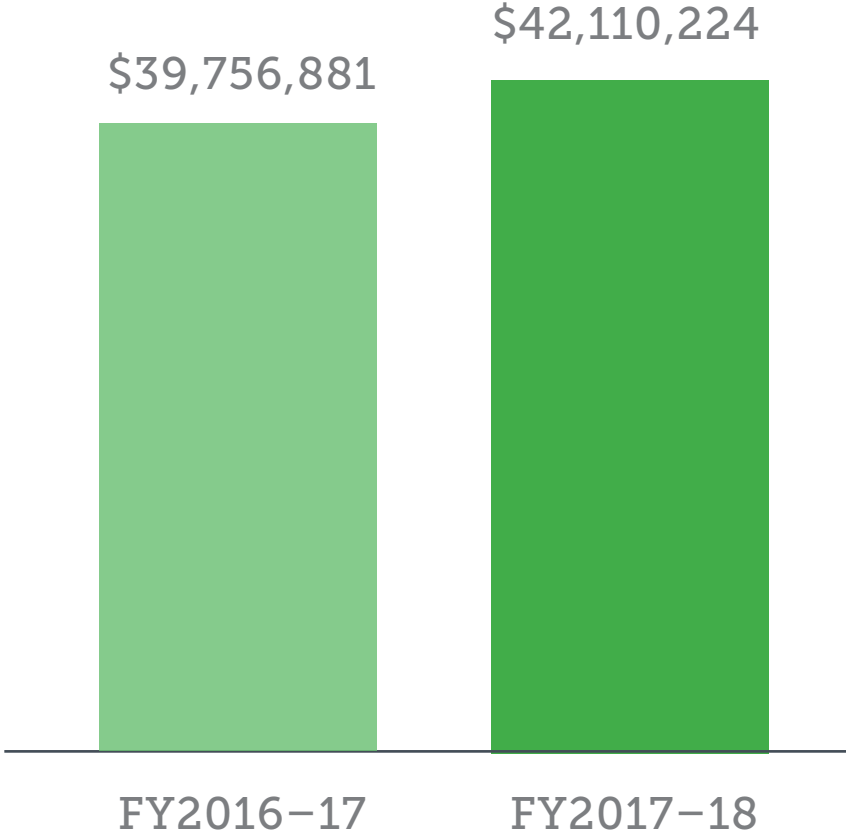


Visitation & Spending



Source: Davidson Peterson & Associates

Bed Tax

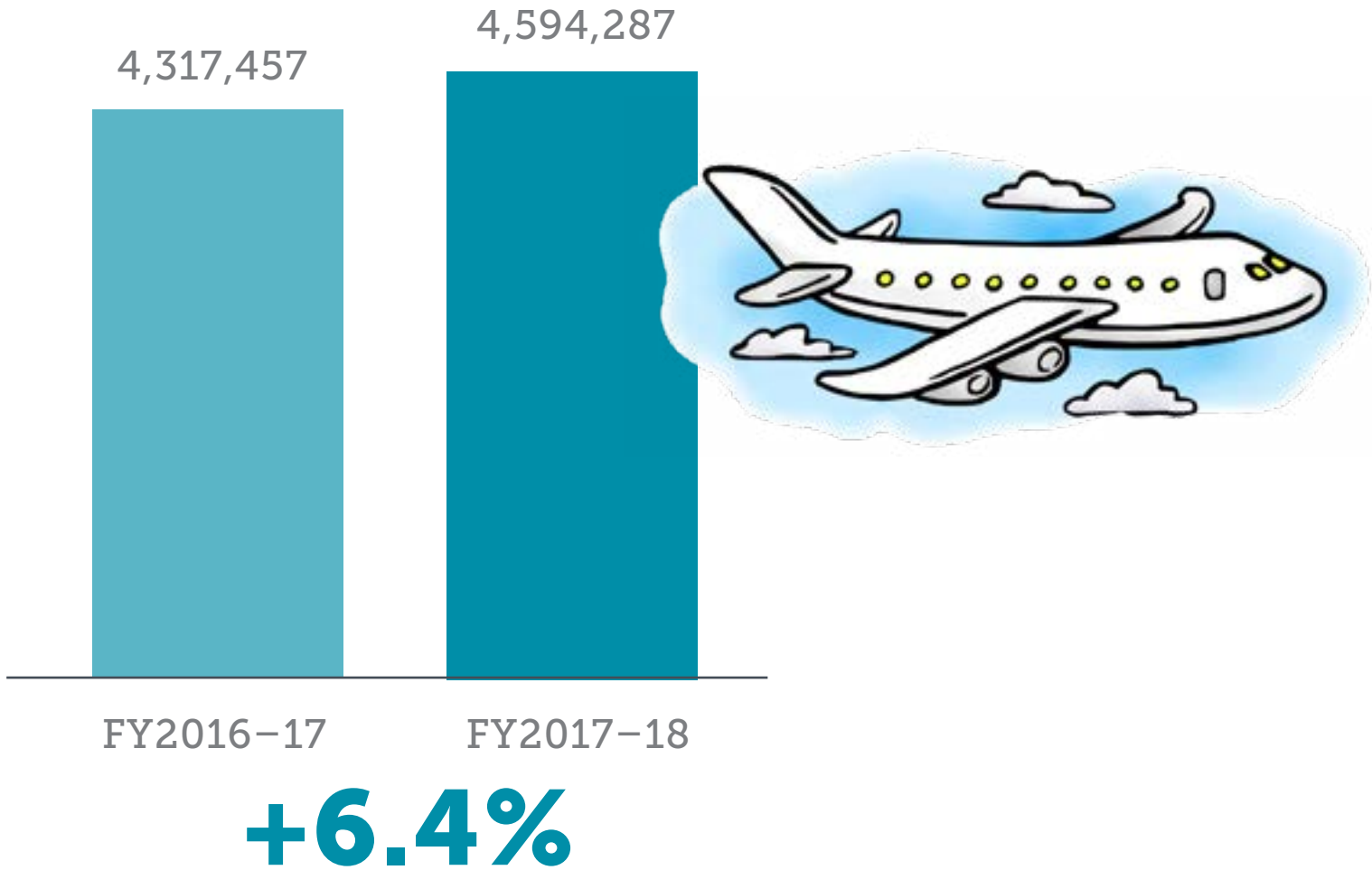


+5.9%

Source: Lee County Clerk of Courts



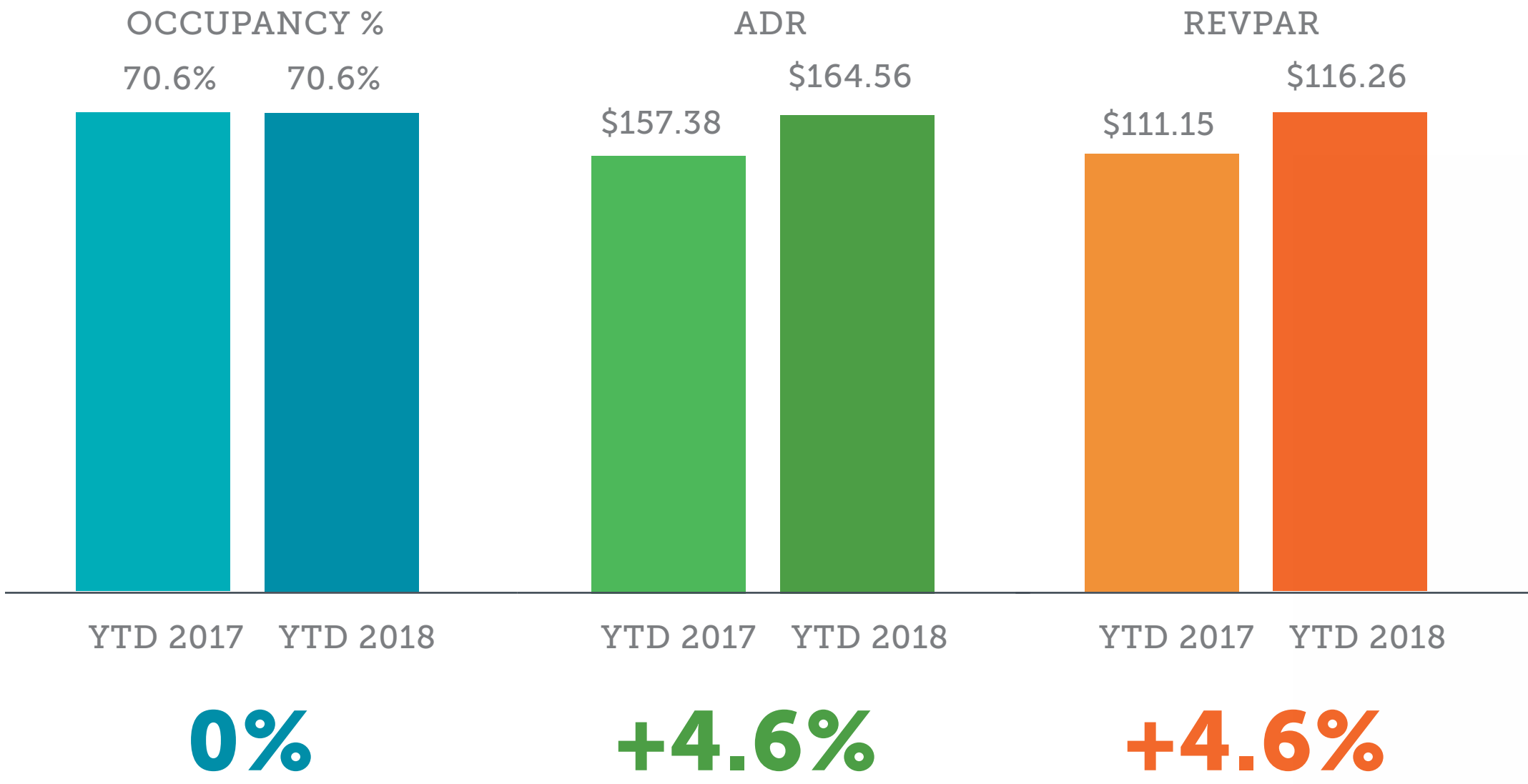
Southwest Florida International Airport (RSW) Passenger Arrivals



Source: Lee County Port Authority Department of Communications and Marketing



Lodging Performance



Source: STR Data Calendar YTD September 2018 over YTD 2017

Awards & Accolades

2017–2018 Accolades

Media

- Negotiated \$2.2 million in added-value media, exceeding goal by 13%
- Exceeded lead goal by 53% and inquiry goal by 109%

Website

- 23.4% of website visits resulted in a partner referral
- FYTD saw a 14% increase in new users and a 17% increase in overall site visits

Social

- Instagram engagement increased by 117%
- Executed three social media contests, garnering nearly 97,000 entries

eCRM

- Increased open rate by 4% across all lead sources
- Increased guidebook requests via email by 36%

Public Relations

- CBS: "The Best Islands in America"
- MSN: "The 25 Best Beaches in the U.S."
- *Condé Nast Traveler*: "15 Best Beaches in Florida"

Sales

- Contracted group meeting room nights increased 23%
- Wedding leads sourced increased 105%



Awards & Accolades

Awards

HSMAI Adrian Awards

2017 Campaigns, Awarded February 2018

Gold:

"Islandology" Campaign

"National Seashell Day" Social Media + PR Campaign

"Summer Shellcation" Print Campaign

FortMyers-Sanibel.com Website Redesign

Bronze:

Meeting Planner Geofencing Campaign

Undertone Page Takeover

Best Use of Social Influencers



VISIT FLORIDA Flagler Awards

2017 Campaigns, Awarded September 2018

Silver:

Website Personalization

Bronze:

Islandology Campaign

ESTO Destiny Awards

2017 Campaigns, Awarded August 2018

Branding & Integrated Marketing Campaign: "Islandology" Campaign

Chute Sightseer Awards

2017 Campaigns, Awarded March 2018

Best Use of Social Influencers

eTourism Summit eTSY Awards

2017 Campaigns, Awarded October 2018

Best Short-Form Video: "Don't Fall For It" Social Campaign

Best Organic Social Media Post: "National Seashell Day "

FY 2017–18 Target Results

	FY2017–18 Targets	Source	FY2017–18 Results
Overarching			
Bed Tax	Increase bed tax receipts by 2.75% over final FY2017 collections	Audited Returns	Increased by 5.9%
Out-of-State Domestic Visitation	Grow out-of-state visitation in paid accommodations by 2% over final FY2017 visitor count	Visitor Intercept Survey	Increased by 9.6%
In-State Visitation	Grow in-state visitation in paid accommodations by 1% over final FY2017 visitor count	Visitor Intercept Survey	Increased by 22.7%
International Visitation	Maintain international visitation in paid accommodations	Visitor Intercept Survey	Decreased by 23.8%
Length of Stay	Maintain length of stay	Visitor Intercept Survey	Increased from 4.62 days to 4.71
Visitor Recall	35% or higher recall of destination advertising	Visitor Intercept Survey	42%
Paid Media			
Impressions	710,000,000	Ad Services	739,236,628 impressions
Total Inquiries	15,000,000	Google Analytics/DoubleClick	34,309,327 inquiries
Total Leads	275,000	Google Analytics	421,769 leads
CPM	\$16.57	Contracts	\$11.42
Added-Value Placements	Negotiate \$2,000,000 in added-value placements	Contracts	\$2,264,326
Social Media			
Facebook Likes	Increase Facebook likes by 50,000	Facebook	48,230
Twitter Followers	Increase Twitter followers by 10,000	Twitter	4,731
Instagram Followers	Increase Instagram followers by 9,000	Instagram	9,627
Website Referrals	Generate 100,000 referrals to website	Google Analytics	210,418
Total Social Media Engagements	Garner 3,000,000 total engagements	Facebook, Twitter, Instagram	2,046,015
Total Social Impressions	120,000,000 total impressions	Facebook, Twitter	100,018,588

FY 2017–18 Target Results

	FY2017–18 Targets	Source	FY2017–18 Results
Website			
Average Pages/Visit	Average 2.5 pages viewed per use. This takes into account general and promotional traffic	Google Analytics	1.9
Guidebook Conversions	1.5% of total website visitors request or view guidebook	Google Analytics	1.2%
eNews Sign-Ups	Capture 25,000 email opt-ins	Google Analytics	32,077
Average Visit Duration	Average time spent on site 2:00	Google Analytics	1:50
Lodging Partner Referrals	20% of visits to include a referral to a partner site	Google Analytics	21.65%
eCRM			
Website Leads			
<i>Unique Open Rate</i>	22% open rate	ExactTarget/Google Analytics	21.3% open rate
<i>Click-to-Open</i>	23% click-to-open rate	ExactTarget/Google Analytics	23.4% click-to-open rate
Reader Service Leads			
<i>Unique Open Rate</i>	14% open rate	ExactTarget/Google Analytics	16.5% open rate
<i>Click-to-Open</i>	17% click-to-open rate	ExactTarget/Google Analytics	22% click-to-open rate
Digital Lead Generation Leads			
<i>Unique Open Rate</i>	8% open rate	ExactTarget/Google Analytics	11% open rate
<i>Click-to-Open</i>	15% click-to-open rate	ExactTarget/Google Analytics	20% click-to-open rate
All Leads			
<i>Partner Referrals</i>	Increase partner referrals to 32,000	ExactTarget/Google Analytics	25,641
<i>Guidebook Requests</i>	Increase guidebook requests and virtual guidebook views to 3,000	ExactTarget/Google Analytics	3,803
Product Development			
Event Development	10% increase in room nights for IHSF & TDC funded events	Events/Venues	19% decrease in room nights overall (due to canceled events and water crisis)
Attractions Marketing	Maintain number of applicants; 10% increase in attraction visitation and media impressions	Applications	18% increase in applicants, 12% increase in attraction visitation, 9% increase in media impressions

FY 2017–18 Target Results

	FY2017–18 Targets	Source	FY2017–18 Results
Industry Relations			
Guests First Training	1,595 participants (+5%) and 143 CGSPs (+10%)	Guests First	1,671 participants (+10%) and 143 CGSPs (+10%)
Guests First Training	84 sessions	Guest First Sessions	91 sessions
Team Tourism Events	Host a minimum of five partner events	Team Tourism	Hosted five partner events
Award Recognition	Execute E Awards and Chrysalis recognition programs	E-Awards/Chrysalis	Recognition programs successfully executed
Tourism Ambassadors	Field a team of 135 volunteers to support the VCB in multiple areas	Visitor Services	A team of 138 volunteer Tourism Ambassadors and 2 student interns directly assisted nearly 190,000 visitors arriving at the Southwest Florida International Airport via our five Visit Florida Certified Visitor Information Centers
Media Relations			
Media Impressions	Reach 3.15 billion media impressions (+5%)	Vocus and any other monitoring services	3.2 billion media impressions
Group and Individual Media FAMs	Maintain 120 group and individual media FAM tours hosted	VCB Count	110 group and individual media tours hosted (down slightly due to water crisis)
Media Interviews/Desksides (media tours, phone or email interviews, events outside of destination)	Increase the number of media engagements to 350	VCB Count	305 global media engagements
Top-tier Editorial Coverage (NEW)	Increase top-tier editorial coverage by 10%	VCB Count	Following the VCB PR team's guidelines for Tier 1 coverage, top-tier U.S. coverage increased by 8% (this does not include any media coverage that happened on behalf of the VCB in international markets – the VCB needs to provide)
Sales – Domestic & International			
Meeting/Conference Conversion	Grow room nights contracted to 36,370 (+4%)	Simpleview	43,137 (+23% growth), 119% of goal attained
Meeting Leads	Increase leads generated by VCB to 508 (+5%)	Simpleview	478 (0% growth), 94% of goal attained
FAM Trips	Host 125 travel professionals	VCB Count	198 travel professionals, 158% of goal attained
Client Events	Maintain a minimum of 25 client events	VCB Count	42 client events, 168% of goal attained
Wedding Leads	Increase leads generated by VCB to 131 (+15%)	Simpleview	234 (+105% growth), 179% of goal attained

Tourism Performance Summary

Across the organization, teams are continuing to deliver strong results and the impact on tourism performance is obvious.

Insights

- International tourism will likely be slower to recover due to political and financial uncertainties in overseas markets. The unsettling business sentiment between our country and those we look to for tourists will likely continue to sour perceptions and dampen interest for the foreseeable future. Our measured efforts to engage these markets and distance our destination from the rhetoric will help to stem dramatic declines, but we should be ready for international visitation to be off pace.
- Interest in our destination domestically, as exhibited by responses to our media efforts and our ongoing research, is strong and growing. We attracted twice the inquiries we targeted for FY 2017-18 and nearly double the leads. Each of these results were achieved with a minimal increase in paid media impressions or a significant change in investment. The key to accomplishing this is maintaining consistency in our primary market targeting, while also being nimble and aggressive when we gain new flight access.



Looking Forward

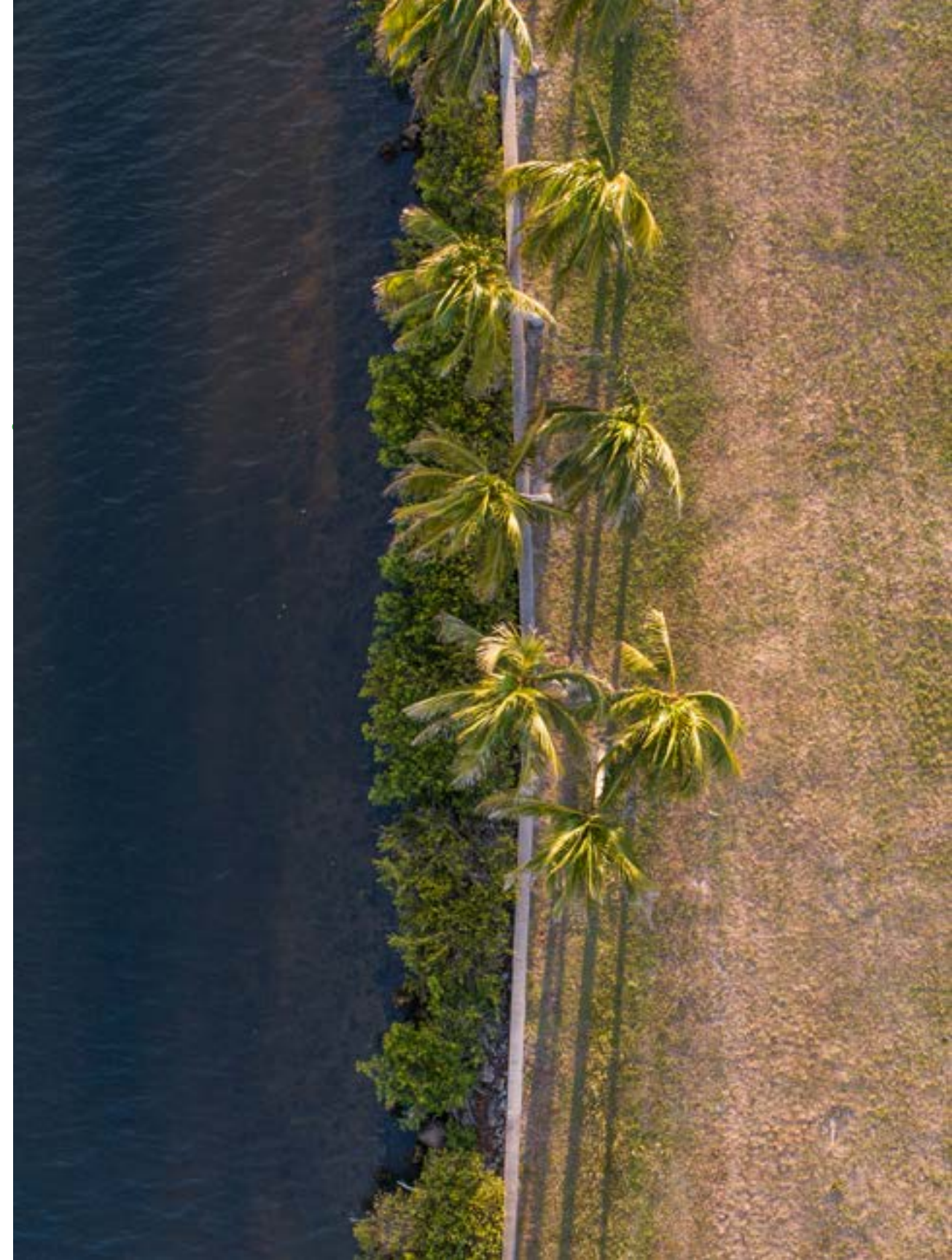
Travel Market Trends



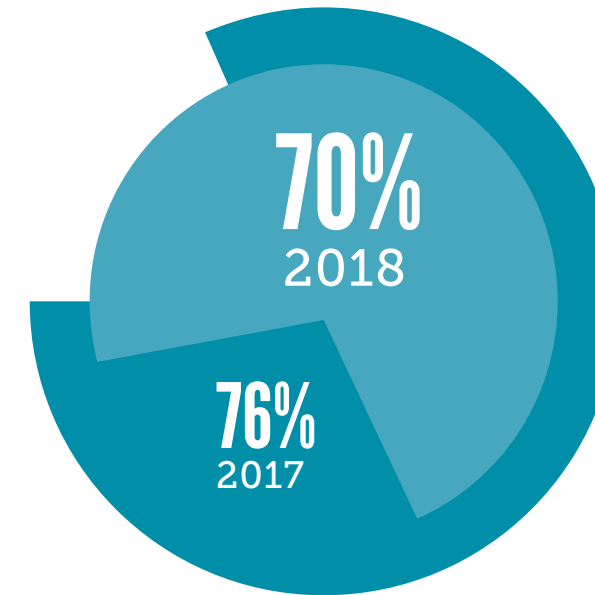
Traveler Sentiment

According to the third-quarter results published in MMGY Global's *travelhorizons*TM report, a study that indicates future travel spending and intentions, positive perceptions about travel are dipping slightly from what have been historic highs.

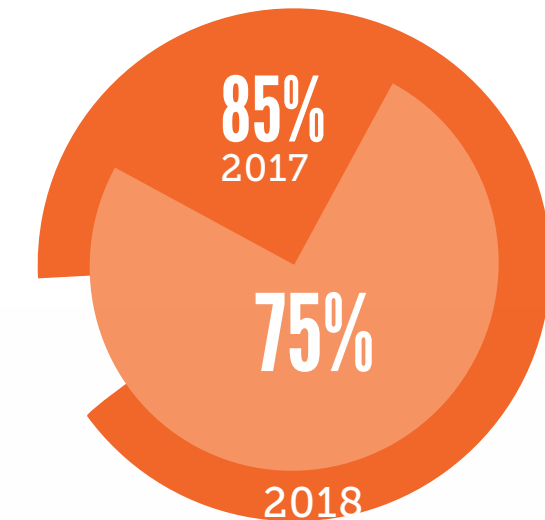
The Travel Sentiment Index (TSI), a combined measure of six travel intent and perception scores indexed against 2007 data, sits at 110. This is still positive, but down six points from the same report in 2017.



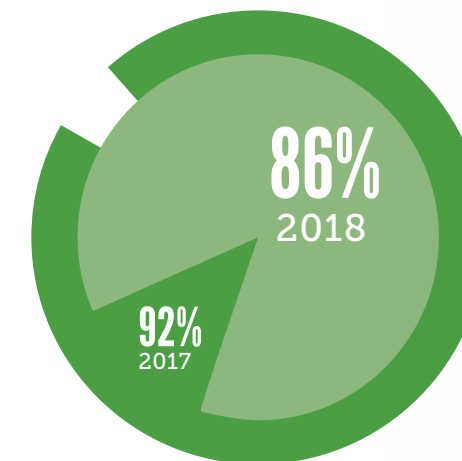
Seven in 10 respondents (70%) traveled for leisure in the past 12 months – down significantly from those who reported having done so in the third quarter of 2017 (76%).



Three-quarters of Millennials (75%) and Gen Xers (73%) took at least one leisure trip during the past 12 months. Significantly fewer Millennials reported taking a vacation compared to those who did so last year (85%).



Households (86%) whose annual incomes were over \$100,000 traveled for leisure compared to 92% in 2017.



THE PRIMARY ELEMENTS DRIVING DOWN FUTURE TRAVEL INTENTIONS ARE FINANCIAL OR TIME RESTRICTIONS.



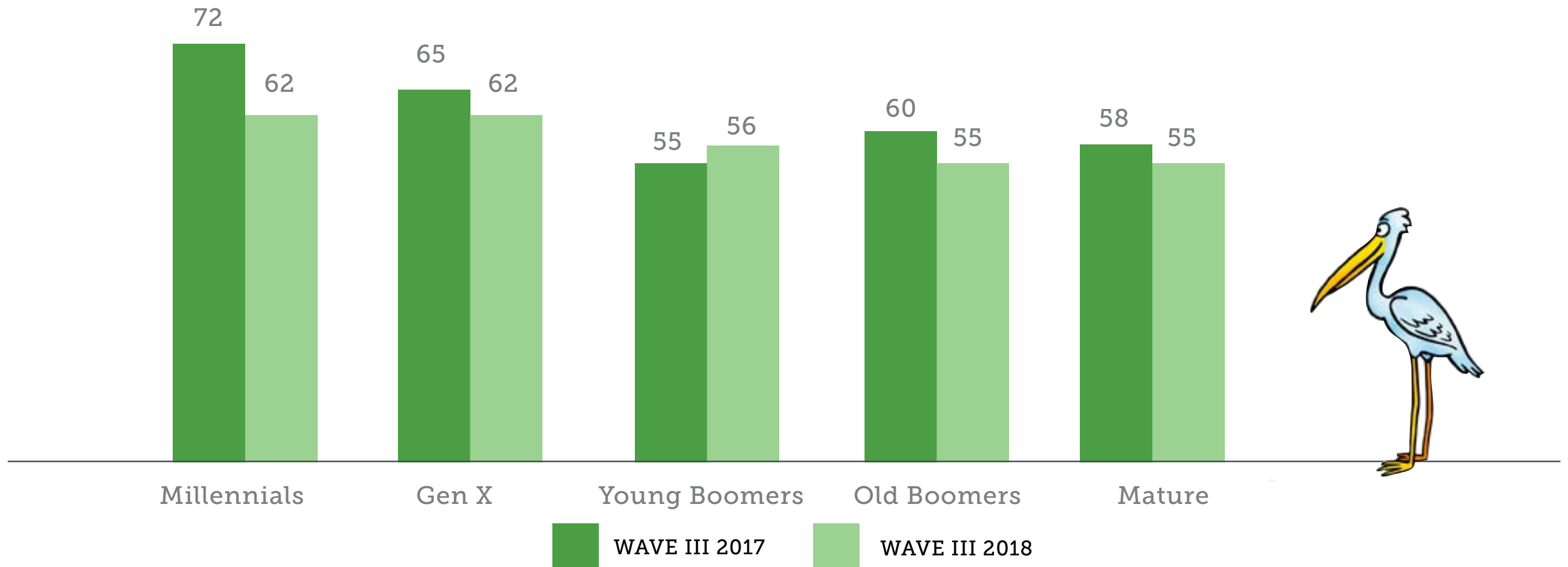
Compared to the third quarter of 2017, nearly all TSI variables displayed decreases, with the largest being perceived affordability of travel (160), down 14 points, followed by time available for travel (105), down eight points.

The most frequently cited reasons for planning to take fewer vacations are household budget concerns (29%), no time or too busy (24%), travel in general is too expensive (23%) or gas prices are too high (17%).

The financial factors affecting the likelihood of travel that respondents are most concerned about are a high level of credit card debt (37%), the expectation of losing one's job (36%) and the expectation of making less money (32%).

Leisure Travel Intentions

DURING THE NEXT 6 MONTHS BY GENERATION



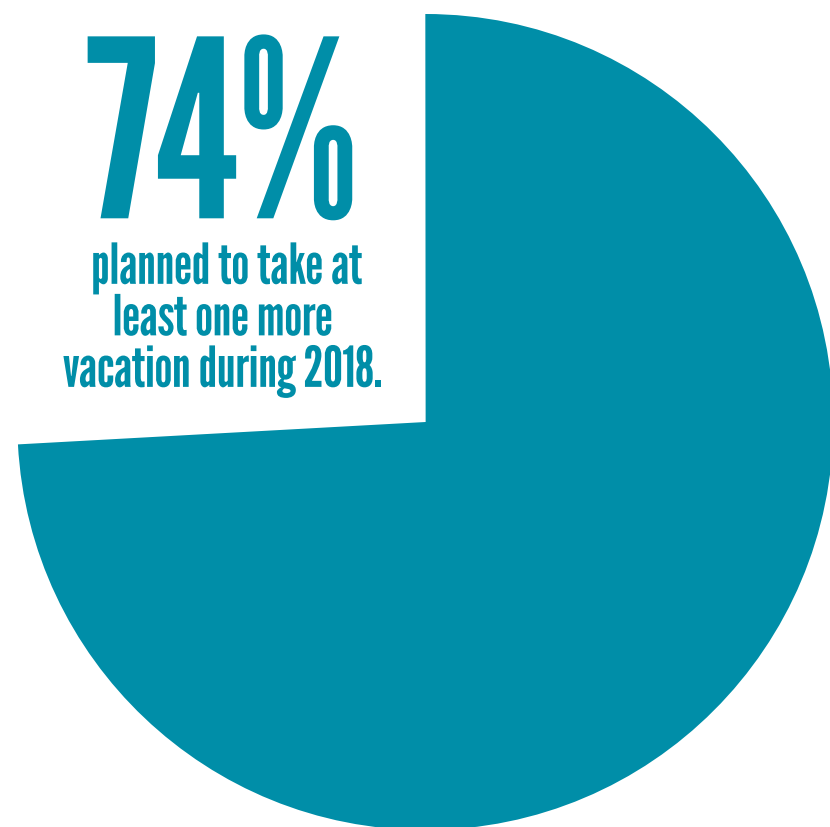
25% of American travelers indicate an interest in visiting the destination.

While overall American traveler sentiment is down slightly, the case is not the same for those with a stated interest in visiting The Beaches of Fort Myers & Sanibel.

In the primary national *travelhorizons*TM study from the third quarter of 2018, 25% of American travelers indicate an interest in visiting The Beaches of Fort Myers & Sanibel. Of this 25%, 36% fall into the Millennial generation and 26% into Gen X. Generations aside, 34% of traveler households earning \$150,000 or more are interested in visiting within the next year.

1 in 3 households earning \$150,000 or more are interested in visiting.





Of the 25% of American travelers interested in visiting The Beaches of Fort Myers & Sanibel, 74% were planning to take at least one more vacation during 2018 – this is significantly more than the 59% of all U.S. adults who planned to do so.

Source: MMGY Global, travelhorizons™, Wave III 2018

4 in 10

plan to take more vacations in 2019
compared to 2018.



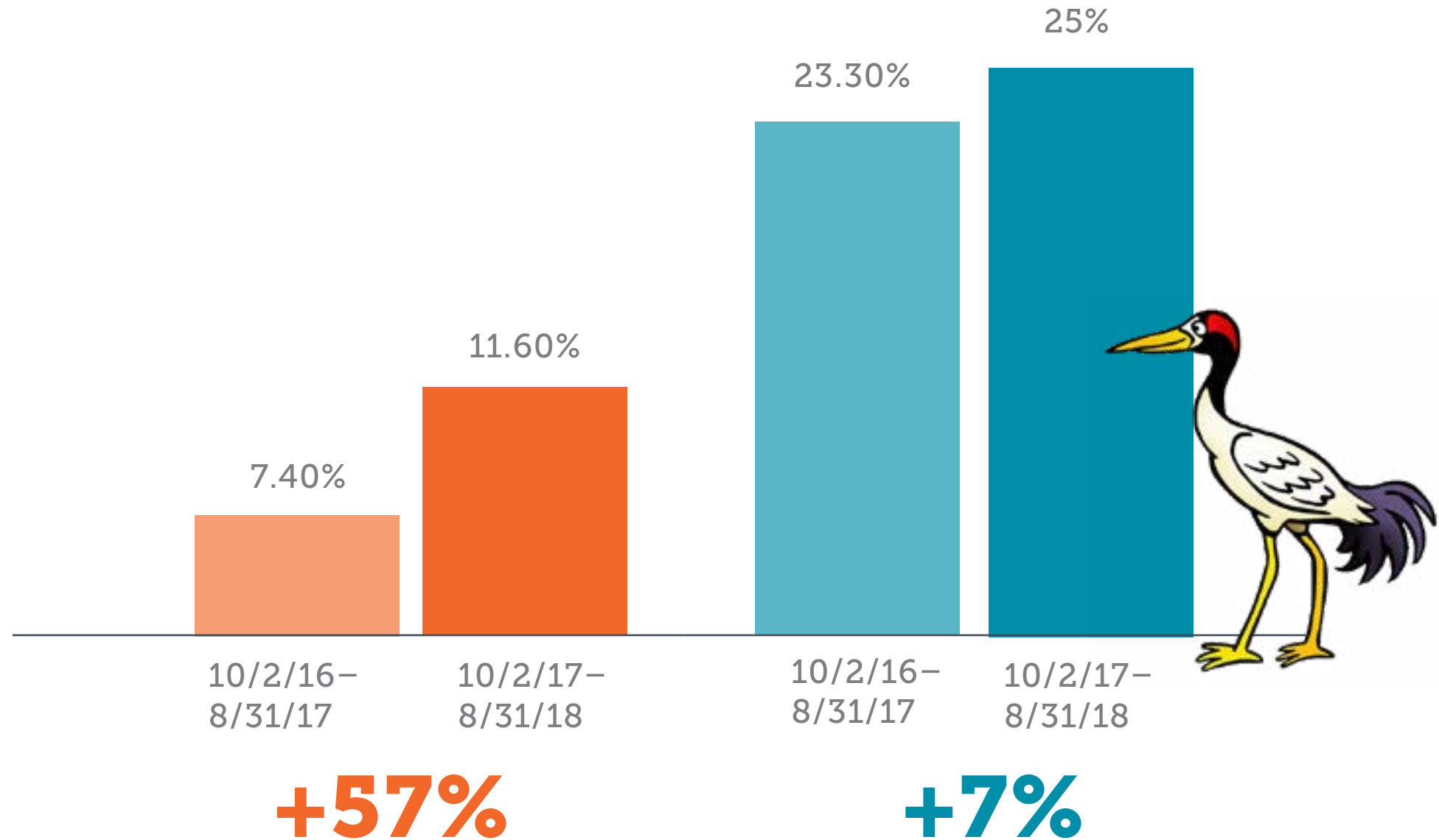
Also, nearly four in 10 of those interested in visiting The Beaches of Fort Myers & Sanibel (37%) plan to take more vacations next year compared to this year and only 18% plan to take fewer – this variance equates to a positive difference of 19%.

AGE DISTRIBUTION OF FLIGHT SEARCHERS

25-34

35-44

As a secondary measurement of interest and intent to visit The Beaches of Fort Myers & Sanibel, we've included a report from our digital media tracking tool, Adara Impact. This report shows that among those searching and booking our destination, the highest growth is coming from Millennials and young Gen Xers – two groups that have been intentionally marketed to over the past few years as we work to bring new visitors to the area and the two groups exhibiting the highest interest from *travelhorizons*™.



Making It Happen

Our Targets & Strategies



2017-2020 Critical Measures of Success

- Grow year-round occupancy by 5%
- Grow RevPar by 15%
- Increase annual visitor spending to \$3.35 billion





Entering 2017, the VCB embarked on creating a refreshed and holistic three-year strategic plan for delivering on our mission, vision and ongoing destination marketing objectives. Within this plan, there are four imperatives.

1. Build the tourism pipeline
2. Employ “always on” marketing
3. Promote our natural assets
4. Help our community spread our tourism story

Underlying these imperatives are some core objectives and tactics that marketing, public relations and sales can implement in 2019.



1. Continue to develop and refine the intelligence we gather about our leisure and business travelers to better understand the impact of our investments and to reach more people like them who may visit in the future.
2. Routinely adjust our investments to maintain year-round promotions and optimize cross-discipline support for all seasons and markets, including international.
3. Strengthen the connection between tourism and the growth and prosperity of our communities.



FY 2018–19 Target Markets

Key markets

- Spot Markets: Atlanta, Boston, Chicago, Cincinnati, Cleveland, Columbus, Detroit, Hartford, Indianapolis, Milwaukee, Minneapolis, New York City, St. Louis, Washington, D.C.
- In-State: Miami-Fort Lauderdale, Orlando, Tampa-St. Petersburg, West Palm Beach (digital only)
- Additional Digital Markets: Dallas, Denver, Kansas City, Philadelphia

International leisure feeder markets

- Primary: Canada, Germany, United Kingdom, Scandinavia (Norway, Sweden, Denmark, Finland)
- Secondary: Benelux (Belgium, the Netherlands, Luxembourg) Switzerland, Austria, Ireland, France



Marketing

Trends

The modern marketing landscape is constantly shifting. Consolidations of major technology providers, mergers between telecom and media companies, and new media market entrants have all introduced additional capabilities while, at the same time, adding more complexity to the marketplace.



Marketing

Trends

Recent headlines have been dominated by news of privacy law enhancements and a continued focus on the proper application of technology. We are committed to the ethical and responsible collection and usage of our visitors' data.

At the end of this year it is forecast that more households will be using streaming entertainment services than those on traditional cable or satellite platforms. This trend opens up opportunities for us to continue to expand the distribution and targeted placement of our broadcast assets with efficiency and focus not afforded by traditional channels.

Domestic tourism volume (intended activity for 2019) has leveled off from a previous two years of growth.



Marketing

Trends

Connected smart TV usage and viewership will surpass traditional TV viewership in the first quarter of 2019. The rise of streaming providers and customizable channel lineups is making it easier and easier for consumers to cut the cord.

Early next year, wireless carriers will begin to rollout and test 5G networks. These networks will run 20 times faster than the best 4G/LTE networks. This will make mobile connectivity a legitimate competitor to Wi-Fi technology.

eMarketer estimates that 30% of Gen Xers and 38% of Millennials will be regularly utilizing “smart speaker” technology in 2019. In general, marketing via these devices is fairly limited but is certain to gain momentum as more and more people make voice search and content discovery on these platforms a part of their daily lives.



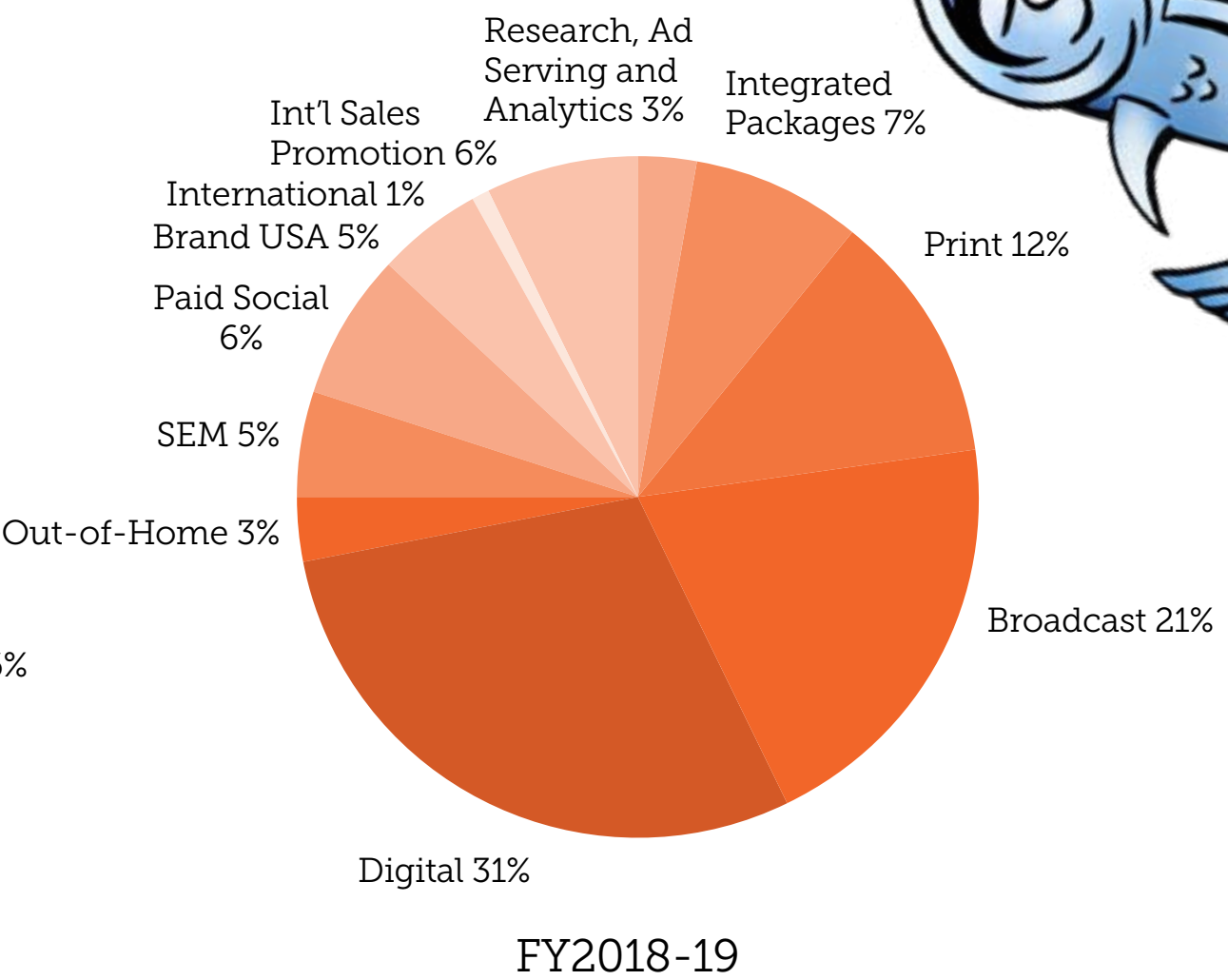
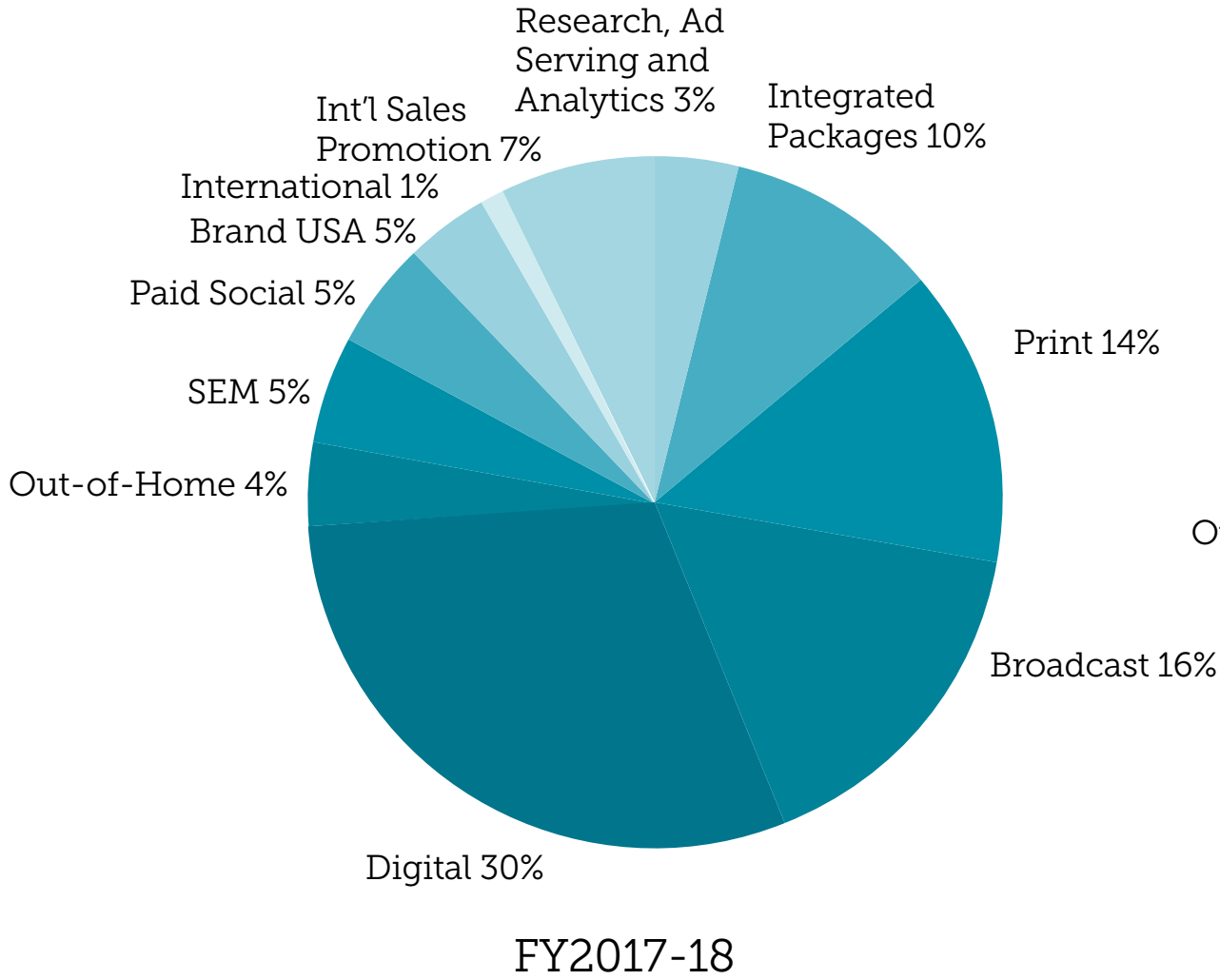
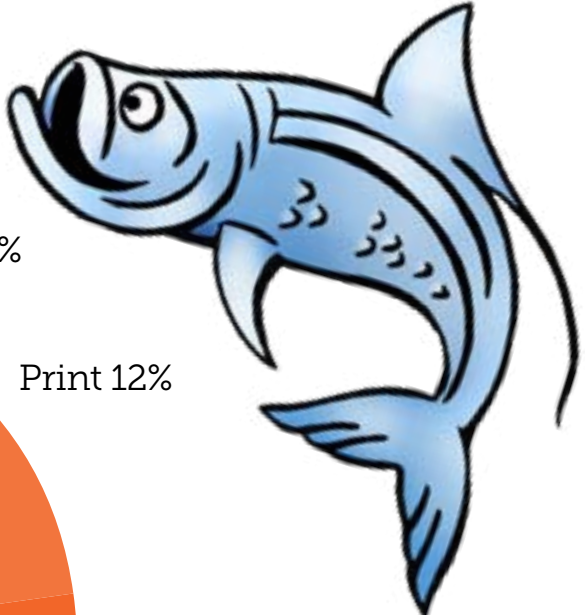
Marketing

Always On

Our objective is to balance demand and visitation throughout the seasons. We target all types of travelers who are planning trips at all times of the year. Therefore, our commitment to supporting a continuous, year-round marketing strategy will continue into 2019. While slight adjustments have been made, our overall media mix looks very similar to 2018.



MEDIA MIX | YOY SHIFTS



Marketing

Be Data-Driven

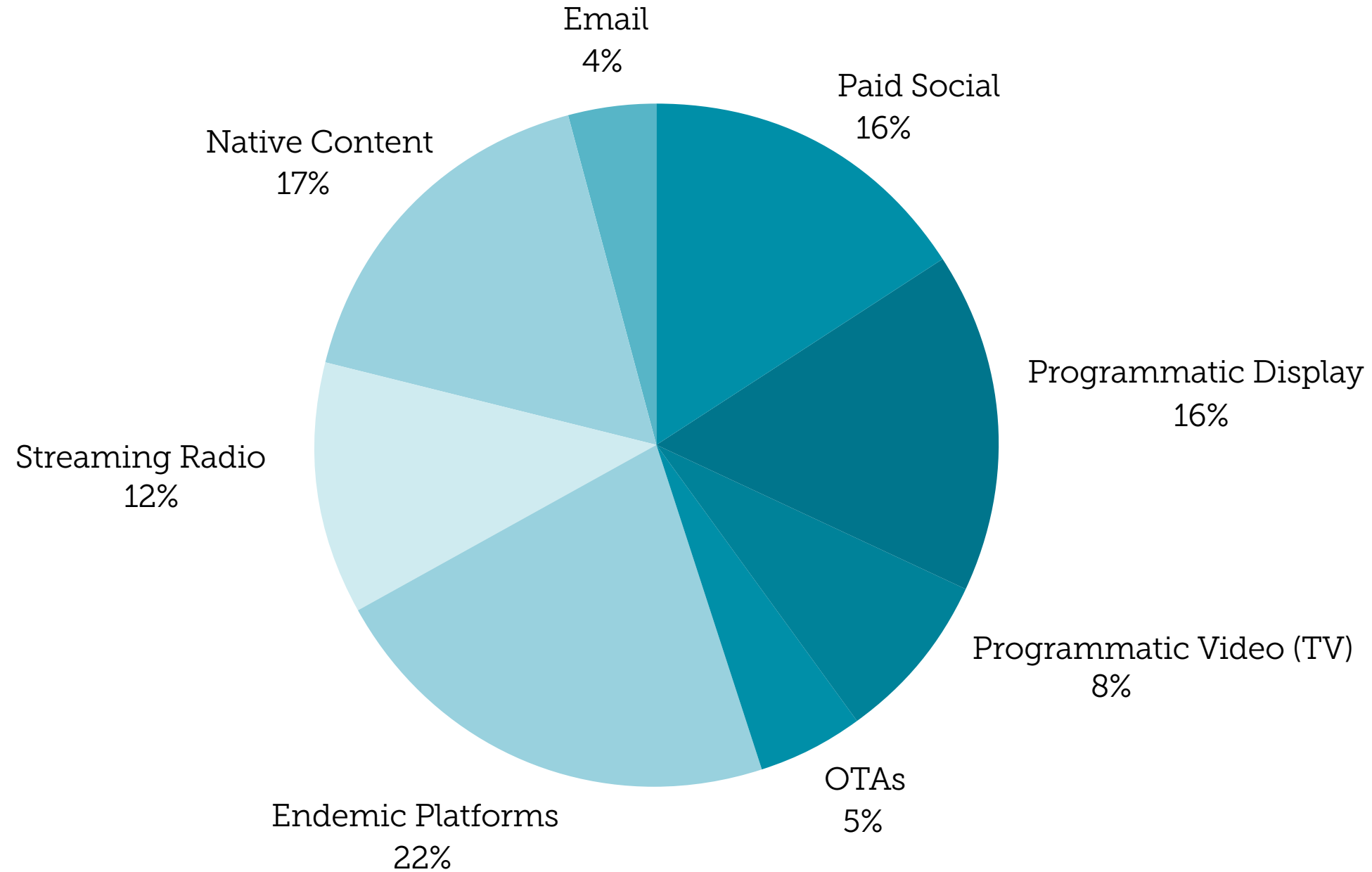
Actionable data continues to drive our marketing decisions and investments. We've established audience personas that encompass demographics, psychographics and life-stage influences, and aligned our media placements to reach these audiences where they are consuming content with a relevant destination message.

Digital First

Our direct digital spend represents roughly 30% of our total marketing investment. These investments are detailed on the following page. Within these platforms, roughly 50% is directly supported by addressable data sourced to represent our primary personas and target audience segments.



DIGITAL MEDIA ALLOCATIONS



The Beaches of Fort Myers & Sanibel Target Personas and Audiences

There are three personas and five core audiences that our marketing pursues for brand messaging and media targeting.



Williams R. Able



Going for It



Free Birds



Paddles @ Play



Together & Traveling



Theme Park Survivors



Snap Happy



Fido In Tow

TARGET PERSONAS



Williams R. Able

Active, Affluent Families

Cooperative Decision-Makers

Between 30 and 51

\$125K+ HHI

16% Hispanic

92% Married

86% Full-Time Employed

52% Graduate School Degrees



Going for It

Active, No Kids

Primarily Male Decision-Makers

Between 25 and 39

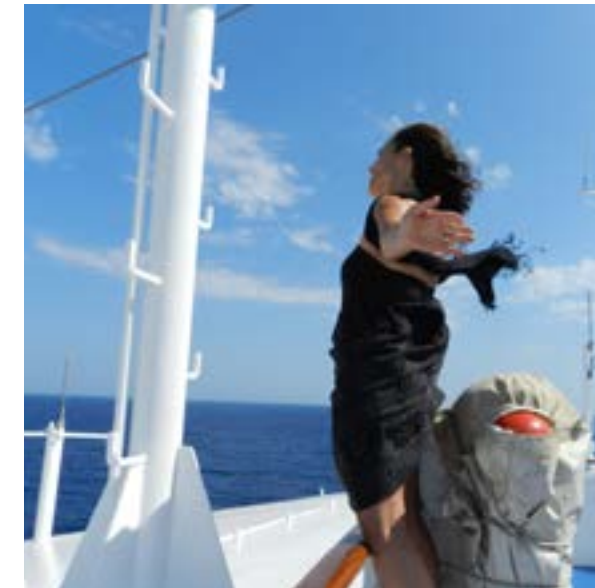
\$75K+ HHI

28% Non-Caucasian

61% Unmarried

71% Full-Time Employed

33% Graduate School Degrees



Free Birds

Active, Empty Nesters

Primarily Female Decision-Makers

Between 55 and 65

\$100K+ HHI

43% Grandparents

82% Married

41% Part-Timers or Retired

42% Graduate School Degrees

AUDIENCE PROFILES



Paddles @ Play (Includes all personas)

Destination Passion Points:

- Kayaking the Great Calusa Blueway at locations, such as Lovers Key State Park, Mound Key, Buck Key and Pine Island
- Visiting J.N. "Ding" Darling National Wildlife Refuge for nature hikes, paddleboarding, kayaking and wildlife viewing
- Boating and island hopping throughout the destination, exploring our more than 100 barrier islands



Together & Traveling (Includes all personas)

Destination Passion Points:

- Married couples traveling without children who are looking to get away
- Interests include exploring area beaches, swimming, sunbathing, golf, shopping, historical attractions and dining
- Enjoying the laid-back atmosphere of the destination, feeling at peace with the charm of authentic Florida

AUDIENCE PROFILES



Theme Park Survivors (Subset of Williams R. Able persona)

Destination Passion Points:

- Soft adventure family activities, such as fishing, kayaking, swimming, sunbathing, collecting seashells and getting on the water
- Visiting attractions, such as Times Square, Edison & Ford Winter Estates, J.N. "Ding" Darling National Wildlife Refuge and charter cruises
- Exploring different parts of the county, looking for family-friendly activities suitable for older children



Snap Happy (Includes all personas)

Destination Passion Points:

- Discovering the area's most beautiful locations to capture the best selfies
- Watching the sunset from the Fort Myers Beach Pier, photographing wildlife at the Six Mile Cypress Slough Preserve or Corkscrew Swamp Sanctuary, early morning shell walks on the area's best beaches, capturing the iconic Boca Grande and Sanibel lighthouses, and much more

AUDIENCE PROFILES



Fido In Tow (Includes all personas)

Destination Passion Points:

- Visiting Dog Beach Park located on the south end of Fort Myers Beach
- Dining at a selection of dog-friendly restaurants
- Enjoying outdoor activities, such as collecting seashells, hiking and nature parks where pets are allowed to accompany their owners



Target Personas & Audiences

Right Person, Right Message

Along with the ability to be more direct and targeted with media comes the need to be more personal and relevant with the messages we deliver.



Target Personas & Audiences

Website Personalization

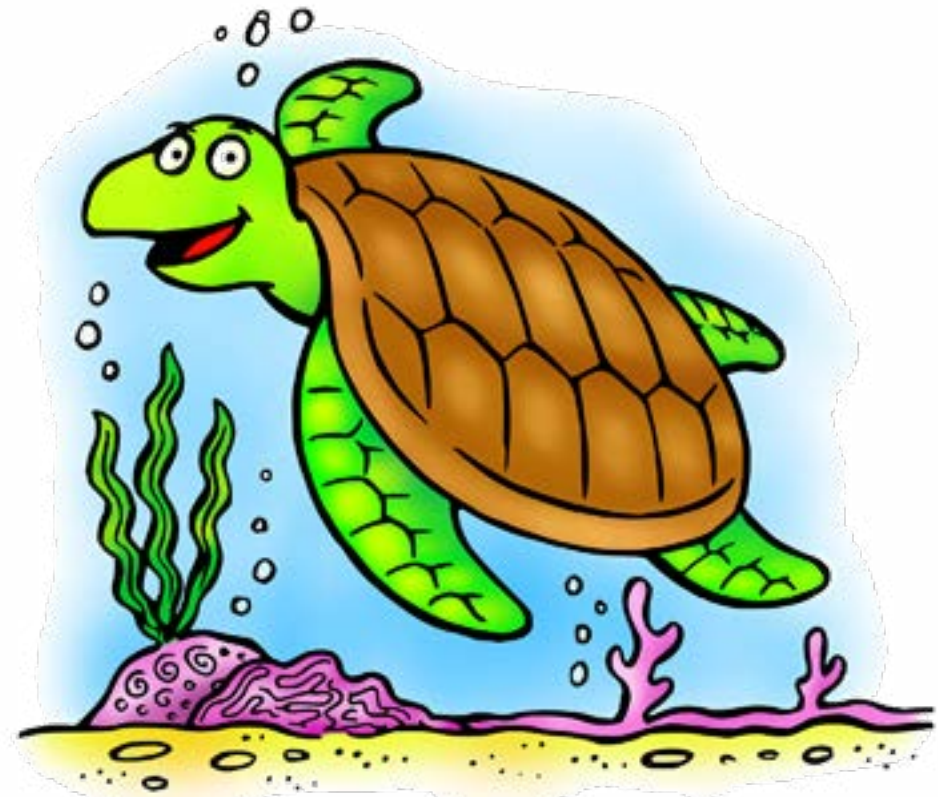
Our ability to expose our site visitors to the content that drove their inquiry will be enhanced in 2019. This technology allows for the website content to be representative of the content and advertising message they have experienced. Such relevance has proven to drive incremental engagement and conversion to action.



Target Personas & Audiences

Customized Creative Messaging

New technologies allow our creative presentation to be highly customized to our audiences. Where audience data is used, we will tailor our visuals and content to be as relatable and relevant as possible.



Target Personas & Audiences

Speak with One Unified Voice

As an industry, we are all eager to play a role in bringing new visitors to our destination. To do so, we should all be champions for the brand. Our brand messaging, "Islandology," is not only meant to deliver a narrative that draws visitors but also rallies the tourism industry to solidarity.

The tourism industry is our destination's economic growth engine. Our community understands the role that tourism plays and our residents are valuable advocates who should be empowered with a unified voice. The VCB will continue to reach out and provide education to our industry partners on how everyone can work together to convey a consistent message.



Sales

Core to the VCB's mission is the sales effort. The mission of the sales department is to promote The Beaches of Fort Myers & Sanibel to meeting professionals, the travel trade and leisure visitors to positively influence visitor volume. Overall, the VCB sales team provides resources to industry partners and travel influencers to help grow meeting, business and pleasure travel in Lee County.



Sales – Targets

Targets

- Provide resources to industry partners and travel influencers to help grow meetings business and domestic and international leisure travel to Lee County
- Host 125 travel professionals in the destination through FAM and site tours
- Increase meeting and conference room nights from leads generated by VCB by 5%
- Grow meeting and conference room nights contracted by 3%
- Increase destination wedding leads generated by VCB by 5%
- Conduct a minimum of 30 client events



Sales – Domestic

Trends

- Personalization is key
- Experiential travel
- Going green/ecotourism
- Relaxation vacations



Sales – Domestic

Cultivate Relationships

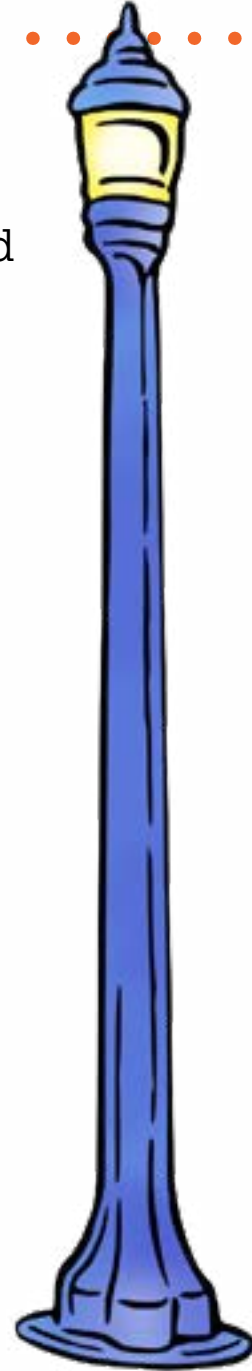
- Participate in a multitude of consumer travel shows in key feeder cities
- Participate in multiple travel agent trade shows
- Promote The Beaches of Fort Myers & Sanibel as a key destination for nature activities such as ecotourism, kayaking, camping, birding, fishing and water recreation at an array of sports/outdoor consumer shows
- Establish new and strengthen existing relationships with key travel agency and wholesale tour operator partners through sales missions and targeted sales calls
- Identify and target travel agencies with a business travel focus to grow corporate transient business in anticipation of hotel pipeline growth
- Support efforts to develop new domestic air service



Sales – Domestic

Be an Agent to Agents

- Conduct travel agent training, both classroom and web-based
- Conduct east coast and west coast Florida travel agent sales missions
- Conduct travel agency and AAA agency sales calls and presentations in primary and secondary feeder markets
- Promote and provide travel agents with personalized service for destination information through the Travel Agent Help Desk
- Host FAM trips and site visits for domestic travel trade



Sales – International

Trends – Germany

- German travel to the U.S. is down 7% in 2018 year to date. Despite this challenge, market growth is expected to occur in 2019
- Travel agents are still a key force in the market, and the majority of long-haul bookings in Germany continue to be made through traditional travel agencies. However, there is a noticeable shift in the use of direct channels or online travel agencies
- Germans want to mix their holidays with other experiences and they look for culture and safety
- FIT (Free Independent Traveler) travel is on the rise; key tour operators are expecting 10% growth in 2019

Source: Tourism Economics (January-September 2018)



Sales – International

Trends – United Kingdom

- U.S. market share is down due to factors such as the unfavorable exchange rate and the political climate however, research shows this is only short term. In the long term, the U.S. will regain its appeal
- U.K. consumers have become value-driven and travel aggregators have risen in popularity, which means consumers are looking for good value propositions
- Purchasing shift from traditional tour operators to online travel agencies and individual bookings for FIT travelers
- Digital is key – brands need awareness across all digital platforms. Consumers are using smartphones, tablets and social media as a method of research and booking. Research can come from word of mouth, social media and advertisement



Sales – International

Trends – Canada

- The Canadian dollar (loonie) has stabilized against the U.S. dollar. It is forecasted to stay in the high 70-cent range throughout 2018–19
- Boomers continue to be the primary driver of outbound travel volume. Beach, nature, shopping and culture are trip motivators
- VISIT FLORIDA now has full in-market representation for Canada, which will provide the destination and its partners with more opportunities



Sales – International

Trends – Scandinavia

- Vacationing is a very high priority in the Scandinavian culture. With six weeks of paid vacation, their heaviest travel periods are in the spring and summer months
- Fly-and-drive itineraries are dominant in tour operator offerings
- Online bookings are increasing for flights and hotels. Packaged tours to tier 2 destinations continue to be booked through tour operators
- Even though arrivals to the U.S. show a decline for the Nordic countries, air carriers continue to increase seat capacity from the Nordic countries into the U.S. This is a positive trend that confirms the interest in inbound travel from this market
- Active vacations in natural surroundings are very popular, and travelers generally look for unique destinations that their neighbors have not yet visited
- There is a noticeable increase in early bookings; travelers take advantage of low airfares and look for the best value in their air, car and accommodation bookings



Sales – International

Cultivate Relationships

- Attend international consumer and travel trade shows in key markets to ensure the destination is well represented
- Create targeted sales missions and travel agent meetings with partners in key markets
- Support efforts to develop new international air service
- Increase collaboration and partnership with other west coast Florida DMOs to collectively grow international visitation to the region from emerging markets
- Explore further growth of emerging markets through partnership opportunities with VISIT FLORIDA and Brand USA



Sales – International

Travel Trade Outreach and Education

- Implement and grow e-Learning platform in core and emerging markets: Germany, U.K., Scandinavia, and Latin America
- Host FAM trips to create and reinforce awareness of destination with international travel agents and product managers
- Conduct in-market interviews with top media to secure positive articles about the destination and our travel trade efforts



Sales – Group

Trends

- Meetings demand in 2019 will grow 5% globally, and the average group size will increase by 14%*
- Experience and engagement, such as unique team-building activities, authentic food, involvement with locals, quirky venue spaces for off-sites, increase in second- and third-tier cities
- Safety and security (physical and digital)
- Going green – eco-friendly/sustainability
- Well-being and health/meet mindfully
- On-site technology, as well as tech-free zones to give attendees a breather to network or just relax in a shared space

**Source: CWT Meetings & Events' 2019 Meetings & Events Future Trends Report)*



Sales – Group

Cultivate Relationships

- Attend trade shows and other client-facing opportunities to generate new business, strengthen current client relationships network with and educate decision makers
- Maintain a strong presence at all third-party planner annual conferences
- Host meeting planner and decision-maker FAM trips and site visits to the destination
- Create meeting planner e-newsletter and promote meeting campaign showcasing our natural setting inspiring innovation and productive meetings



Sales – Group

Pursue High-Impact Business and Expand Industry Support

- Focus on top potential production opportunities for sponsorship investments
- Attend more corporate-focused meeting planner shows to mine new corporate conferences that are best fits for the destination, thereby continuing to grow corporate market lead conversion rate
- Conduct quarterly sales and marketing meetings with industry partners to continue conversations regarding their key customer profiles in all group segments
- Explore further growth of specialty markets, such as the LGBTQ and multicultural markets
- Invest in destination partnerships and maximize membership programs
- Promote the Island Incentive Offer to grow and secure new business
- Enhance VCB conference services with a meeting planner toolkit on the website to assist planners in event attendance building
- Emphasize destination customer service training, Guests First, to promote a high level of service in the destination

LINK: [Master Trade Show List](#)



Public Relations

The public relations team supports the marketing of The Beaches of Fort Myers & Sanibel with proactive, results-oriented strategies that follow the best practices of tourism communications. Working with journalists and other media representatives in the community, in Florida, nationally and internationally, the team provides messaging and compelling reasons to visit and return to the destination. This fiscal year, the team will also focus on working with other marketing channels to drive tourism back to the region post-red tide.



Public Relations

Targets

- Reach 3.2 billion global media impressions
- Increase the amount of global group and individual FAM tours to 120 (+10%)
- Increase the number of global media engagements (media tours, phone or email interviews and events outside of destination) to 350 (+15%)
- Increase global tier 1 editorial coverage (according to VCB guidelines) by 10%



Public Relations

Trends

- Hard-hitting destination news
- Launches, openings and significant renovations
- Unique or over-the-top experiences that are authentic to destinations
- Sustainability stories and/or philanthropic initiatives and programming
- Wellness offerings
- Uncommon or nontraditional happenings in destinations
- Pop-up experiences, cultural events and festivals
- Spotlight the destination's colorful and unique personalities
- Affordable luxury experiences



Public Relations

Showcase All the Destination Has to Offer

Follow an editorial pitch calendar to proactively send pitches monthly to generate the best domestic and international editorial coverage for the destination. Key pitch verticals include culinary, culture, family, men's interest, outdoor recreation, romance, trade, wellness, wildlife and women's interest. Continue outreach to Millennial-focused media outlets in an effort to attract a newer, younger visitor, especially Millennials who are starting to have families.



Public Relations

Host monthly individual and group press trips (4–6 media) with domestic and international media to promote a variety of story angles. Potential press trip themes include wellness, fishing and boating, wildlife and nature, romantic getaways, weddings, honeymoons and spring training.

Coordinate media tours in key domestic and international markets throughout the year with consumer lifestyle and travel media to promote current water conditions and travel to the destination. Invite press to visit destination during deskside meetings.



Public Relations

Host a media and consumer-facing event in key domestic and international markets that promote trending story angles and unexpected aspects of the destination for potential visitors.

Continue to craft pitches for TV programs covering a broad spectrum of story ideas, tailored for each format and audience.

Beyond the core program, continue to explore novel ways to elevate the destination through strategic alliances, partnerships and packages riding current trends.



Visitor Services

Targets

- Produce a minimum of three Team Tourism events that provide partner engagement and education that benefits tourism industry growth
- Encourage more E Awards nominations to recognize the powerful impact tourism workers have on ensuring a visitor has a successful destination experience

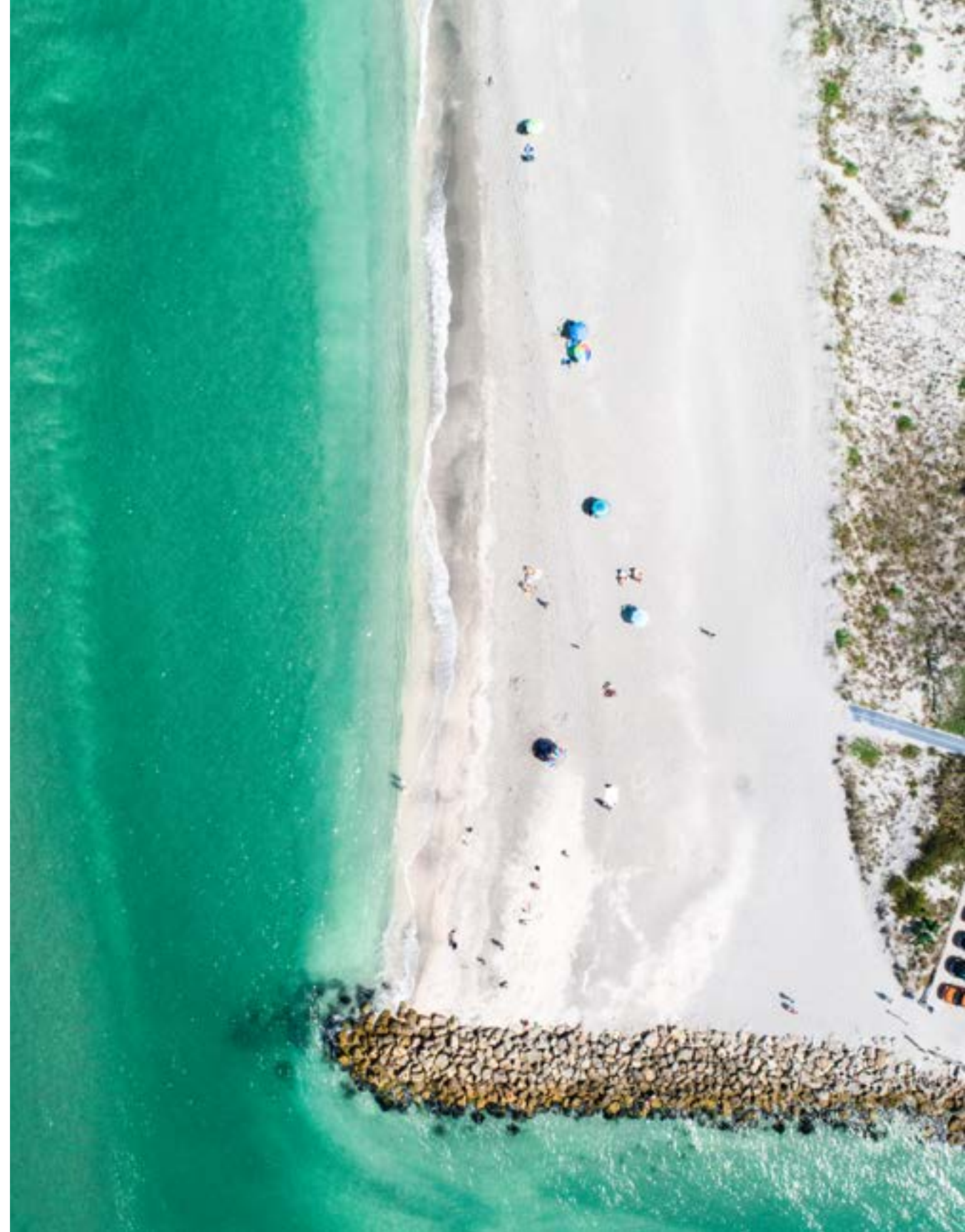


Visitor Services

Tourism Ambassadors

Continue to nurture and grow a team of over 135 well-trained volunteer Tourism Ambassadors to assist visitors at:

- Southwest Florida International Airport
- U.S. Customs and Border Protection APC kiosks and with TSA support
- JetBlue Park and CenturyLink Sports Complex/Hammond Stadiums for mobile information kiosks during spring training games
- Information desks at tourism-focused community events, festivals and conferences



Tourism Education

Guests First Program

- Lee County frontline and management professionals expand their skills through training on customer service, conflict resolution, nonverbal communication and more
- Those who complete the Guests First program and pass the American Hotel Lodging & Educational Institute (AHLEI) exam earn the globally recognized credentials of Certified Guest Service Professional (CGSP)
- With these professional development tools, we can make Lee County the friendliest destination in the world



Guests First

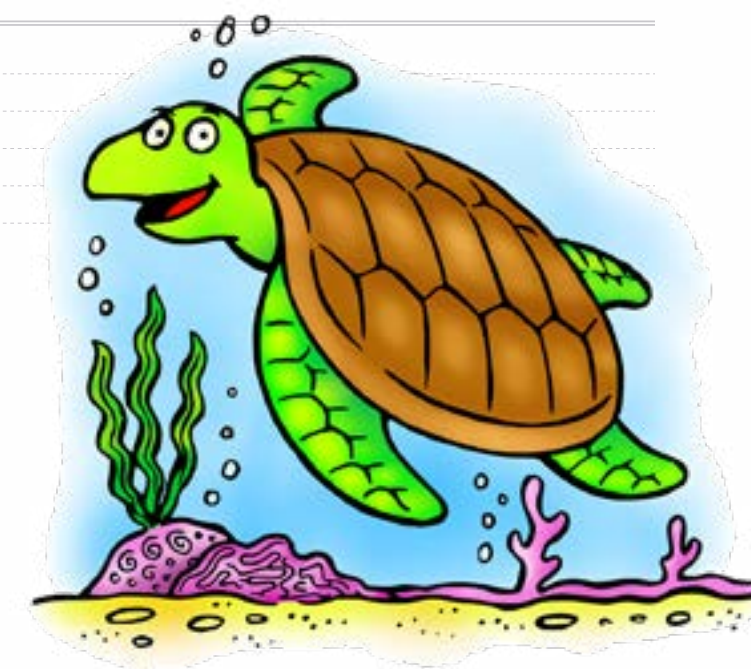
Targets

- Increase Guests First participation by +5% and CGSPs by +10%
- Expand partnerships by hosting our customer service training throughout the county to include hoteliers, restaurants and attractions
- Increase awareness about the Guests First challenge and get more tourism businesses certified through the American Hotel Lodging Association



FY2018–19 Targets

	Source	FY2018–19 Targets
Overarching		
Bed Tax	Audited Returns	Increase bed tax receipts by 1% over final FY2018 collections.
Out-of-State Domestic Visitation	Visitor Intercept Survey	Grow out-of-state visitation in paid accommodations by 2% over final FY2018 visitor count
In-State Visitation	Visitor Intercept Survey	Maintain in-state visitation in paid accommodations
International Visitation	Visitor Intercept Survey	Increase international visitation in paid accommodations by 4% over final FY2018
Length of Stay	Visitor Intercept Survey	Maintain length of stay
Visitor Recall	Visitor Intercept Survey	35% or higher recall of destination advertising
Paid Media		
Impressions	Ad Services	710,000,000
Total Inquiries	Google Analytics/DoubleClick	25,000,000
Total Leads	Google Analytics	300,000
CPM	Contracts	\$15
Added-Value Placements	Contracts	Negotiate \$2,000,000 in added-value placements
Social Media		
Facebook Followers	Facebook	Increase Facebook followers by 50,000
Twitter Followers	Twitter	Increase Twitter followers by 3,000
Instagram Followers	Instagram	Increase Instagram followers by 10,500
Website Referrals	Google Analytics	200,000 referrals to the website
Total Social Media Engagements	Facebook, Twitter, Instagram	2.5 million engagements
Total Social Impressions	Facebook, Twitter	110 million impressions



FY2018–19 Targets

	Source	FY2018–19 Targets
Website		
Average Pages/Visit	Google Analytics	Average 2.5 pages viewed per use. This takes into account general and promotional traffic
Guidebook Conversions	Google Analytics	1.2% of total website visitors request or view guidebook
eNews Sign-Ups	Google Analytics	Capture 25,000 email opt-ins
Average Visit Duration	Google Analytics	Average time spent on site 2:00
Lodging Partner Referrals	Google Analytics	Maintain 22% of visits to include a referral to a partner site
eCRM		
Website Leads		
<i>Unique Open Rate</i>	ExactTarget/Google Analytics	Maintain a 22% open rate
<i>Click-to-Open</i>	ExactTarget/Google Analytics	Increase click-to-open rate to 24%
Reader Service Leads		
<i>Unique Open Rate</i>	ExactTarget/Google Analytics	Obtain open rate of 15%
<i>Click-to-Open</i>	ExactTarget/Google Analytics	Obtain a click-to-open rate of 19%
Digital Lead Generation Leads		
<i>Unique Open Rate</i>	ExactTarget/Google Analytics	Obtain open rate of 10%
<i>Click-to-Open</i>	ExactTarget/Google Analytics	Obtain click-to-open rate of 18%
All Leads		
<i>Partner Referrals</i>	ExactTarget/Google Analytics	27,500
<i>Guidebook Requests</i>	ExactTarget/Google Analytics	3,300
Product Development		
Event Development	Events/Venues	Maintain Event room night count, increase media impressions 5%
Attractions Marketing	Applications	Maintain number of Attraction marketing applicants, increase visitation & impressions by 5%

FY2018–19 Targets

	Source	FY2018–19 Targets
Industry Relations		
Guests First Training	VCB Count	1,755 participants (+5%) and 158 CGSPs (+10%)
Guests First Training	VCB Count	96 sessions (+5%)
Team Tourism Events	VCB Count	Host a minimum of five events
Award Recognition	VCB Count	Encourage 700 E Awards nominations
Tourism Ambassadors	VCB Count	Continue to nurture and grow a team of over 135 well-trained volunteer Tourism Ambassadors to assist visitors
Media Relations		
Media Impressions	Vocus and any other monitoring services	Reach 3.2 billion global media impressions
Group and Individual Media FAMS	VCB Count	Increase the amount of global group and individual FAM tours to 120
Media Interviews/Desksides (media tours, phone or email interviews, events outside of destination)	VCB Count	Increase the number of global media engagements (media tours, phone or email interviews, events outside of destination) to 350
Top-Tier Editorial Coverage (NEW)	VCB Count	Increase global tier 1 editorial coverage (according to VCB guidelines) by 10%
Sales - Domestic & International		
Meeting/Conference Conversion	Simpleview	Increase room nights from leads generated by VCB to 233,500 (+5%)
Meeting Leads	Simpleview	Grow room nights contracted to 44,431 (+3%)
FAM Trips	VCB Count	Host 125 travel professionals
Client Events	VCB Count	Conduct a minimum of 30 client events
Wedding Leads	Simpleview	Increase leads generated by VCB to 246 (+5%)



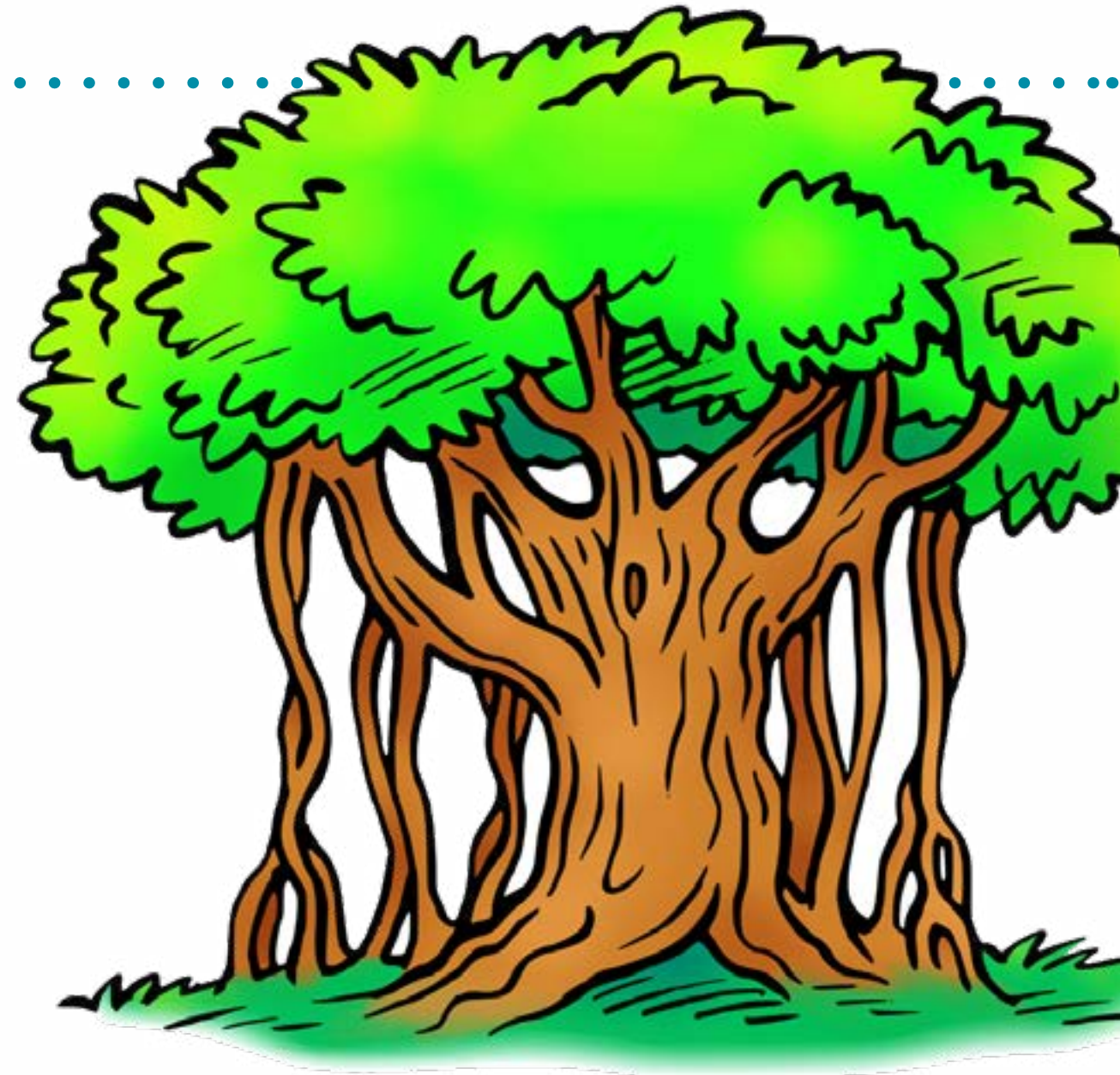


Special Section: Red Tide Recovery Plan

Crisis Communications Plan

Lee County engaged a crisis communications firm, Edelman, to create and manage a plan to drive visitation and help our community recover economically from the red tide water crisis in the summer and fall of 2018. This plan is designed to:

- Address the misperceptions and set the facts straight
- Reach permanent and seasonal residents first to build advocacy that reaches beyond Lee County and resonates with prospective visitors
- Create an ongoing content strategy to establish, support and evolve the narrative



Public Relations Plan

This fiscal year, the communications team will focus on working with media outlets to drive tourism back to the region post-red tide.

The team will communicate with local, national and international media about the improved water conditions of The Beaches of Fort Myers & Sanibel. That will include a satellite media tour that reaches consumers across the country.

The VCB communications teams will increase invitations to individual journalists and group press trips, in particular encouraging journalists who covered the red tide to return so they can provide coverage about improved conditions.

Staff will also travel to key target cities across the country to attend media events, meet with journalists at their publications, and participate in media and consumer shows, including *The New York Times* Travel Show.

Water Quality Fast Action Media Plan

A multitiered campaign continues to educate consumers of improved water conditions and quickly drive visitation. Speed to market and reach were primary considerations in selecting media partners. This approach allows for highly targeted digital executions and broad awareness initiatives in key winter markets to ensure consumers understand our red tide conditions have improved.

Tier 1

Turnkey digital media placements with some of our strongest-performing vendors:

- Digilant features a private marketplace that reaches users on premium sites at a very efficient cost-per-thousand (CPM). Sites include Condé Nast Traveler, Coastal Living, Travel + Leisure, Forbes, Bloomberg and The Travel Channel.
- Expedia serves messaging through premium inventory, targeting users searching for our destination and competing destinations.

- Sojern also leverages consumer searching and booking activity to inform our targeting strategy. Placements include banner, video and native units with user-generated content (UGC) that encourages consumers to visit and “Sea For Yourself.”

Tier 2

Larger, immersive formats sharing robust content via custom articles and dedicated emails:

- eTarget is deploying over 5 million destination-dedicated emails to a relevant audience in key markets.
- TripleLift executes custom content through premium publishers like PureWow and Thought Catalog. Dedicated articles showcase our destination to an engaged audience by highlighting specific areas and activities.

Water Quality Fast Action Media Plan

Tier 3

Balance of traditional TV and digital broadcast campaigns:

- Driving top-of-mind awareness, Islandology TV spots are running in our key winter markets of Boston, Cincinnati, Cleveland, Columbus, Detroit, Indianapolis, Milwaukee, Minneapolis and St. Louis.
- Teads manages a digital broadcast extension campaign before, during and after the TV campaign to increase our reach and frequency.
- Nucleus is placing our full-page print insertions within several in-state newspapers once water quality demonstrates broad improvement throughout the region. Markets include Miami, Fort Lauderdale, Orlando, Tampa and West Palm Beach.



VISIT FLORIDA Red Tide Grant – *The New York Times*

PROJECT GOALS: Use approved VISIT FLORIDA grant funds (\$77,500) to encourage visitors to return to Lee County so they can continue to enjoy our beautiful destination after the retreat of this summer's consistent red tide occurrence.

PROJECT DESCRIPTION: A social- and mobile-first campaign to reach affluent travelers in their social media feeds, as well as *The New York Times* readers on and off platform.

TARGET: Adults 18–49, affluent travelers who are planning to vacation as couples, solo or with their families. The reach is national, with the heaviest audience concentration in the Midwest and on the East Coast.

TACTICS: Through the implementation of a custom program created in collaboration with Hello Studio, a division of *The New York Times*, we are designing

10–15 second loops for InfoMotion, cinemagraph, and photography with animation formats. All content will be distributed through paid social as well as via the native flex frame unit on NYTimes.com.

LAUNCH DATE: Late November 2018

ANTICIPATED RESULTS: (1) An awareness that The Beaches of Fort Myers & Sanibel is open for business because our shoreline is exhibiting improved conditions. (2) A rise in consumer consideration and conversation rates that ultimately result in confirmed hotel bookings and increased bed tax dollars.

MEASUREMENT: We expect to deliver on or exceed the ROI goals of 1.8 million impressions and 34,000 engagements across channels and monitor the uptick in click-through rates (CTR) as a benchmark of increased interest.

VISIT FLORIDA Red Tide Grant – Regional Google DMO

PROJECT DESCRIPTION AND GOALS: Use approved VISIT FLORIDA grant funds (\$112,500) in a five-county regional DMO effort to minimize the visibility of red tide and improve the quality of Southwest Florida's imagery on Google, improve overall consumer perception and encourage deeper engagement on multiple platforms through quality content. Participating counties are Lee, Collier, Charlotte, Sarasota and Manatee.

TACTICS: Through a collaborative effort with Miles Media, this program includes an in-depth review of visual content currently appearing in Google Images, Google Maps, Google Travel Guides and Top Sights for the Southwest Florida market; new content creation encompassing 360 images, candid still images, aerial photos and video clips; and education for industry partners about actions that can be taken within Google's products to combat the impact of red tide.

LAUNCH DATE: Fall/Winter 2018

ANTICIPATED RESULTS: (1) An awareness that Southwest Florida beaches are open for business due to positive qualitative changes in the region's presence on Google. (2) Recommendations on where each DMO's ongoing Google content creation and upload efforts should be focused moving forward. (3) A rise in consumer consideration and conversion rates that ultimately result in confirmed hotel bookings and increased bed tax dollars.

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Special thanks to Sanibel Island cartoonist Dave Horton for his work on illustrating this year's Sales & Marketing Plan!

