



# 2013 MARKETING PLAN

*The Enclave*  
HOTEL & SUITES  
ORLANDO, FLORIDA

# THE ENCLAVE HOTEL & SUITES

## 2013 MARKETING PLAN

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## What is on the cards for us in 2013!

The travel industry is poised for a good year in 2013. The industry's engines aren't firing perfectly on all cylinders just yet, but they are purring well enough to meet demand, and maybe exceed expectations.

Unfortunately, the major players can only go so far to make it happen. As always, they're going to be at the mercy of external events: global oil prices, macro-economic forces, Middle Eastern geopolitics, U.S. government policy, European monetary policy, storms and all the rest.

In short, if 2013 turns out to be a bummer for travel, it very likely won't be the industry's fault, because travel companies have spent the better part of the recession taking care of business. And consumers have responded. Spending on travel by U.S. residents bounced back to prerecession levels in 2011, and it is estimated to have risen 4.3% in 2012, according to the U.S. Travel Association, which is forecasting another 3% rise in 2013, outpacing the expected growth in the economy at large. The increase is even greater when expenditures by foreign visitors is included.

Good news is not hard to find.

Airlines have been cleaning up their acts and their balance sheets, and the last of the Big Three airline bankruptcy restructuring is nearing its final act. The hotel sector, after being slammed by the recession and a drop-off in business and convention travel, is trending up as demand, room rates and occupancy rates have started to rise. Cruise lines, which had the Wave pulled out from under them by the Concordia disaster, are regrouping with enough confidence to place orders for new tonnage. The product is good, and retailers consistently report that people are buying and booking further out, a sign they're not waiting for bargains and are buying with confidence.

And on the corporate side, a recent American Express survey revealed that a majority of senior finance executives anticipate spending the same or more on business travel next year, an indication that corporate travel managers are generally optimistic about getting a return on their business travel dollar.

Consumer confidence, in fact, is at a four-year high, according to the Conference Board, which recently reported that its monthly index rose again in November, to 73.7, the highest level of consumer confidence since February 2008.

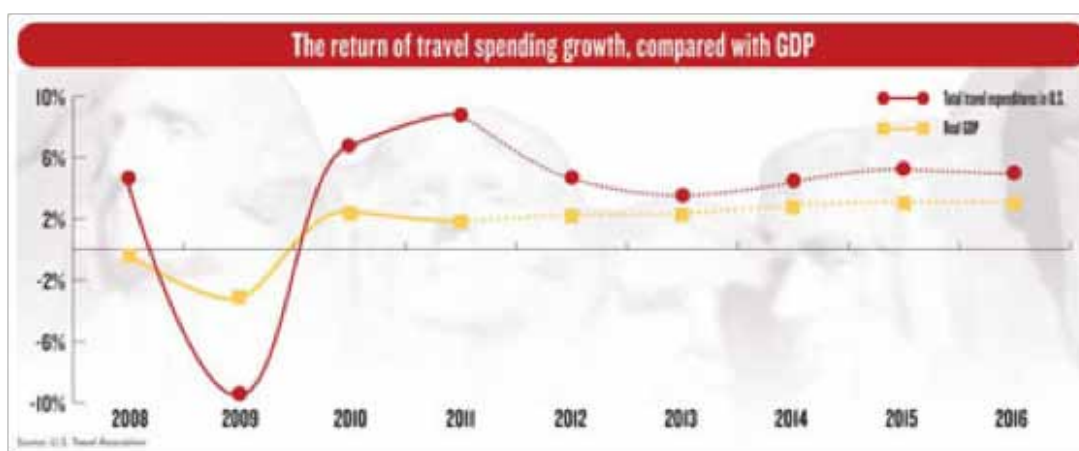
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The Conference Board's index of leading economic indicators also turned north in October, presaging "modestly" expanding economic activity in the near term. The key word there is "modestly."

The Federal Reserve's latest survey of forecasters puts the consensus projection of growth in gross domestic product (GDP) at 2% in 2013, 2.7% in 2014 and 2.9% in 2015.



The unemployment rate, though it has been falling slowly but steadily, is not expected to drop below 7% until at least 2014. For 6.5%, wait another year.

The recovery, in short, is still fragile enough to break, which brings us to the FISCAL CLIFF.

As of this writing, Congress and the White House still have a chance to avoid the automatic tax increases and severe spending cuts that are programmed to begin on Jan. 1. The real question, however, is not whether the government avoids those automatic events, but how.

There will almost certainly be tax increases and spending cuts. Their exact size and nature, and how they are perceived on Wall Street and Main Street, will determine how hard we land. The Global Business Travel Association has estimated that if we go over the cliff, the result could be a reduction of \$20 billion in spending for business travel over nine quarters.

But even if we avoid the cliff, the impact of government austerity measures could still have an impact. U.S. Travel and the American Hotel and Lodging Association have warned that aggressive cuts in government travel budgets, or caps on per diem allowances for

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### INTRODUCTION

government travelers, could compromise federal workforce efficiency and impair the job-creating power of business travel and meetings. Airlines also warn that the administration's proposed taxes on aircraft departures would add to airline costs and possibly lead to higher fares and reduced demand. More broadly, some experts have warned that limitations on the home mortgage interest deduction could seriously rattle the housing market. A decline in housing prices could, in turn, deal a blow to consumer confidence if it reduces homeowners' sense of their net worth.

But barring psychological shocks such as these, or disasters of other sorts, there is every reason to believe that travel and tourism has found its way out of the recession and will continue moving on -- if only the rest of the economy would come along for the ride. The message regarding the 2013 forecast for the U.S. lodging industry from PKF Hospitality Research President Mark Woodworth was stark and clear: Hedge your bets.

Most analysts say the domestic supply of about 4.9 million hotel rooms will increase by less than 1% next year. That would prevent any chance of a double-whammy of aggressive hotel construction and the ensuing economic downturn that struck the U.S. lodging industry five years ago.

Most recently, PricewaterhouseCoopers did cut its forecast for 2013 revenue per available room (RevPAR) growth to 5.4% from 5.6%, setting it at \$65.06 National Average, which is still below the 2007 peak. Luxury hotels will see the biggest gains, with budget properties growing the slowest, and all of the other middle sectors falling in line.

Either way, many hoteliers have reached agreements to either reflag existing properties, commence extensive renovation projects or build new hotels in order to position themselves to benefit from what they hope will be a continued increase in demand.

Forecasts show that owners of both existing and proposed luxury and upper-upscale hotels appear to have the easiest time getting the necessary financing to either break ground or commence the millions of dollars of improvements associated with a de-flagged or rebranded property. Owners and operators of midscale and budget hotels, however, remain challenged in that area. 2013 however, is the decisive time for hospitality business owners and managers to invest in their properties, their talent and their team in order to make their hotels more profitable and successful.

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## Market Summary & Analysis

It was a year bracketed by disasters.

In January, the Costa Concordia, in a series of events that turned out to be as bizarre as they were deadly, passed too close to the Italian island of Giglio and struck a rock that cut a gash in the hull below the waterline, dooming the ship and claiming the lives of 32 passengers and crew.

Nine months later, Sandy, said to be the largest Atlantic hurricane in history, wreaked havoc on the eastern U.S., crippling the New York metropolitan area with flooding and power outages, disrupting travel and causing more than \$60 billion in damage, while causing 125 deaths in the U.S. alone.

These were not only shattering events for the travel industry but major disasters that attracted the world's attention. They marked the year and left lasting scars, but they have one thing in common: In time we will be past them. In time they will be memories as distant as the Andrea Doria and Hurricane Hazel.

For now, however, they loom large in our reflections on the year just past and lead our list of the travel industry's major news events of 2012.

Violence and political unrest remained in the headlines for several key destinations in 2012, keeping travelers away, sometimes in droves. To varying degrees, consumer perceptions of Mexico, Egypt and Israel were colored this year by headlines and government travel advisories. Even Greece felt the pinch from the effect of persistent strikes and demonstrations over its economic woes, prompting the Greek National Tourism Organization to launch a midyear campaign calling attention to the "True Greece."

Mexico entered the year on a high note, having posted a record year in tourist arrivals in 2011. But it did so in the face of a decline in arrivals from the U.S., its largest market and the market where it continued to wrestle with image problems. While we feel for these regions and the communities these disruptions impact; we also know that the boycott of these popular destinations by the consumer brings greater opportunity for the USA and in particular sunshine states such as Florida.

With that said, closer to home and on a much more positive note; in 2012 Florida's tourism industry scored a public-funds victory when lawmakers gave \$54 million to Visit Florida, the quasi-private agency responsible for marketing the state to tourists and business travelers. The amount represents more than a 50 percent increase from 2011 -- when the



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agency received a 31 percent increase from the state despite deep budget cuts imposed in other areas, from state universities to hospitals serving Medicaid patients.

For Orlando the year ended on an incredible high with the completion of the expansion and opening of Disney's New Fantasyland — the largest expansion in the history of the Magic Kingdom park, offering more immersive enchantment and interactive experiences! And if that wasn't enough to keep the guests coming back for another year; More Fantasyland additions are on the way. Next year, Princess Fairytale Hall will house royal meet-and-greets with guests, and the Seven Dwarfs Mine Train roller coaster is scheduled to open in 2014.



And there's more! Having labored in Walt Disney World's shadow year after year, Universal Studio's sprang into the limelight in 2010 with its wildly creative the Wizarding World of Harry Potter attraction, which still prompts gasps and even tears among fans as they see the world they imagined come to life — magic wands, talking portraits and all.

Attendance at Universal's Islands of Adventure, where the Potter attraction is based, skyrocketed 29 percent from 2010 to 2011. Striking while the iron is hot, the park confirms plans to expand Harry Potter's world. Details are hard to come by, but cranes at the park and online rumors seem to indicate that by 2015 there could be a new London street, more magic wand action, a new coaster, and maybe a Hogwarts Express train.

This year, the park opened Despicable Me Minion Mayhem. It added Cinematic Spectacular — an outdoor evening of movie fun and Transformers the Ride 3D, an epic battle between Autobots and Decepticons, opens next summer.



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All wonderful news for us here in Orlando as if past trends are anything to go by, we are in for a busy ride ourselves and for a few years to come!!

The Enclave Suites had an unremarkable year (which is a good thing when all things are considered) but it was a steady year for us. We ended 2012 'Flat' in terms of overall revenues but what is important and interesting to note is where some of the shift in business came from and why.

Historically Enclave Suites has always performed incredibly well on the International Stage with the United Kingdom bringing the lion's share of our traditional wholesale business. However, we knew going into 2012 that the traffic from the UK would see a significant decline and not because of macro-economic or other prevailing factors such as housing market or unemployment.....NO, this year was going to be a challenge.

The Queen of England would celebrate her Diamond Jubilee and the Olympics were to be staged throughout the UK with London being the nucleus of the excitement of the games. Many Brits wanted to stay home for the festivities and who can blame them....London put on stunning tributes and historical events on a scale that have never before been seen, with all the pomp and circumstance of the Royal Family both young and old, that would mark these two momentous occasions and leave indelible images on the minds of the millions who tuned in from around the world to watch them.



The pace for reservations from the UK was clearly going to be off!!! And from very early in the year our key UK partners began expressing grave concerns about the poor booking numbers. Certainly, it was essential for us to participate in offers & promotions to ensure we captured our market share albeit a reduced market to gain share from.

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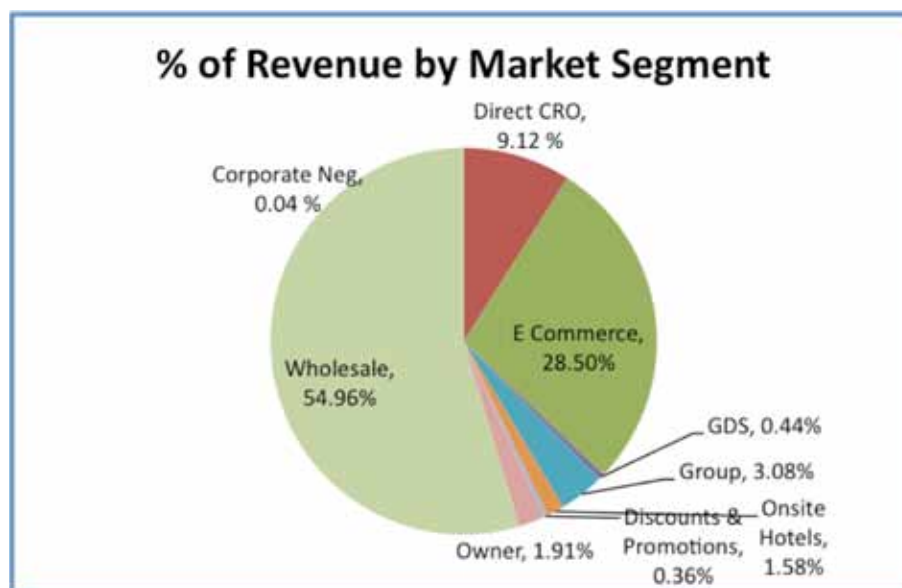
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Wholesale; we did close the gap in the UK segment but it came at the cost of some rate. The Wholesale market segment accounted for 54.96% of the overall business in 2012, an increase of 2.88% with the biggest increases coming from Latin America and surprisingly Northern Europe & Scandinavia.

E-Commerce and specifically E-Commerce Wholesale - continues to grow globally; we are seeing more and more dot com sites coming online and more accounts for us to ensure we have premium placement with. Expedia remains our biggest e-commerce partner generating nearly 13,000 room nights at the Enclave in 2012. E-Commerce Wholesale made up 20.33% of the Enclave's overall business, an increase of 2.24% on 2011. E-Commerce Direct however, will be a key focus for us in 2013. With the development of a new site and the enhanced search engine performance features, E-Commerce Direct is our greatest opportunity for not only increased market share but more importantly the increased rate that this segment will bring.

Groups saw a tough year and while Latin Market individual travel was up for us at the Enclave, Latin Market Group business declined 1% as did convention and corporate group business. We do not anticipate the Corporate or Convention business to be any different in 2013, in fact all indicators are that these group segments will continue to suffer especially with the Orlando Convention Center currently showing a significant decrease in city wide business that brings compression and opportunities for hotels such as the Enclave that are not typically selected by the convention delegate housing bureaus. For Group the opportunity remains with SMERF and again, while down this year, Latin Market forecasts are strong for the coming 3 years presenting Latin group opportunities.



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## Domestic Visitation

Orlando hosted 51.4 million domestic visitors (person-trips) in 2011, an increase of 7.5% over 2010. Eighty-one percent (81%) traveled for leisure purposes (41.43 m), with the remaining 19% visiting for business purposes (9.93 m). Of the total visitation 33.17 m overnights. Domestic visitor numbers to Orlando are on the rise and as such will remain a major component and focus for us in the 2013 Marketing Plan.

There are many attractive characteristics of this market segment for us at the Enclave Suites in addition to the volume and obvious growth opportunity. Detailed below is a summary of relevant statistics that support this focus to include a comparison of both the similarities and differences in the key characteristics of the Domestic/Domestic Leisure, Resident & Non-Resident Overnight visitor.

### Domestic Visitation Summary

- Orlando's share of domestic leisure travel to Florida in 2011 was 30%
- Total 2011 domestic leisure travel volume was up 8.3% from 2010
- Leisure travel to Orlando by Florida residents increased 7.2% to 21.5 million visitors.
- Non-Florida resident leisure travel increased 9.5% to 19.9 million visitors.
- Domestic leisure overnight travel to Orlando increased 9.8% to 28.4 million in 2011.
- Average length of stay among domestic overnight leisure visitors decreased from 4.4 nights in 2010 to 3.9 nights in 2011. Overnight leisure visitors from Florida stayed an average of 2.4 nights, while non-Florida overnight leisure visitors averaged 4.6
- Nearly two-thirds (61%) of domestic leisure visitors came to Orlando for a vacation. This group included 44% who came for a general vacation and 17% who visited Orlando for a getaway weekend.
- Visiting a theme/amusement park was the most popular activity among domestic leisure visitors (50%). Other popular activities included dining (32%), shopping (31%) and general entertainment (30%).
- The majority (57%) of domestic leisure visitors stayed in hotels/motels. A smaller percentage stayed in homes, apartments or condos (19%), timeshare (14%) and other types of accommodations (9%).
- Domestic leisure visitors spent an average of \$459 per person per trip, or \$1,148 per party per trip.
- 69% of domestic leisure visitors drove and 26% flew to Orlando in 2011. The remaining 4% used some other type of transportation such as train or bus. An overwhelming majority of Florida residents (93%) drove to Orlando, compared to 49% of non-Florida residents, nearly half (48%) of non-Florida residents traveled by air.

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- In 2011, the average party size was 2.5 persons. Twenty-eight percent (28%) of domestic leisure travel parties to Orlando included children, down from 35% in 2010.

Historical visitor data show us that significant differences in trip and demographic characteristics exist between leisure visitors from Florida (47%) versus out-of-state leisure visitors (53%). As in past years, non-residents were more affluent, stayed longer, and had higher expenditures per person in 2011 than Florida residents. The majority of non-residents (59%) visited Orlando for general vacation purposes compared to 26% of Floridians. Florida residents were more likely to visit Orlando for a getaway weekend (26%) or to visit friends and relatives (18%) than non-Florida residents (10% and 12%, respectively).

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## Key Characteristics of Domestic Leisure Visitors

Listed below is a table depicting the key characteristics of domestic leisure visitors to Orlando vs. domestic leisure visitors to Florida and the United States as a whole:

Characteristics	US Domestic Leisure		Florida Domestic Leisure		Orlando Domestic Leisure	
Purpose of Trip	Vacation	32%	Vacation	46%	Vacation	61%
	Non-Vacation	68%	Non-Vacation	54%	Non-Vacation	39%
Average Household Income	\$80,754		\$78,200		\$83,799	
Average Party Size (persons)	2.3		2.3		2.5	
Party Structure	With Children	22%	With Children	22%	With Children	28%
	Only Adults	78%	Only Adults	78%	Only Adults	72%
	1 Male & 1 Female	36%	1 Male & 1 Female	37%	1 Male & 1 Female	35%
	1 Adult	28%	1 Adult	27%	1 Adult	24%
	2 Males or 2 Females	7%	2 Males or 2 Females	6%	2 Males or 2 Females	5%
	3+ Adults	7%	3+ Adults	8%	3+ Adults	8%
Top Activities	Theme/Amusement Park	6%	Theme/Amusement Park	18%	Theme/Amusement Park	50%
	Dining	28%	Dining	31%	Dining	32%
	Shopping	25%	Shopping	27%	Shopping	31%
	Entertainment (Gen)	21%	Entertainment (Gen)	24%	Entertainment (Gen)	30%
	Touring/Sightseeing	14%	Touring/Sightseeing	15%	Touring/Sightseeing	17%
Average Nights (All visitors)	1.5		2.6		2.9	
Average Nights (Overnight only)	2.7		3.7		3.9	
Spending per party per trip	\$498		\$857		\$1,148	
Transportation Type	Air	7%	Air	19%	Air	26%
	Auto	88%	Auto	77%	Auto	69%
	Other	5%	Other	4%	Other	4%
Accommodations	Hotel/Motel	44%	Hotel/Motel	41%	Hotel/Motel	57%
	Home/Apartment/Condo	39%	Home/Apartment/Condo	39%	Home/Apartment/Condo	19%
	Timeshare	2%	Timeshare	7%	Timeshare	14%
	Other	14%	Other	12%	Other	9%
Purpose of Trip	<b>Vacation</b>	<b>32%</b>	<b>Vacation</b>	<b>46%</b>	<b>Vacation</b>	<b>61%</b>
	General Vacation	20%	General Vacation	31%	General Vacation	44%
	Getaway Weekend	13%	Getaway Weekend	14%	Getaway Weekend	17%
	<b>Non-Vacation</b>	<b>68%</b>	<b>Non-Vacation</b>	<b>54%</b>	<b>Non-Vacation</b>	<b>39%</b>
	Visit Friend/Relative	30%	Visit Friend/Relative	27%	Visit Friend/Relative	15%
	Special Event	12%	Special Event	10%	Special Event	11%
	Other Personal	25%	Other Personal	18%	Other Personal	13%

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### Accommodations (Overnight only)

Accommodation Type	2009			2010			2011		
	Total	Florida Residents	Non-Florida Residents	Total	Florida Residents	Non-Florida Residents	Total	Florida Residents	Non-Florida Residents
Hotel/Motel	61%	70%	55%	59%	71%	53%	57%	66%	53%
Home/Apartment/Condo	19%	18%	20%	20%	18%	21%	19%	20%	18%
Timeshare	14%	7%	19%	14%	5%	19%	14%	8%	18%
Other	6%	5%	6%	7%	6%	8%	9%	6%	11%

Note: Categories may not add to 100% due to rounding.

Paid vs. Non-Paid	2009			2010			2011		
	Total	Florida Residents	Non-Florida Residents	Total	Florida Residents	Non-Florida Residents	Total	Florida Residents	Non-Florida Residents
Paid	83%	82%	84%	83%	81%	84%	78%	79%	78%
Non-Paid	17%	18%	16%	17%	19%	16%	22%	21%	22%

Paid accommodations include: paid hotel/motel, paid home/apartment/condo, bed & breakfast, ship, timeshare, other paid non-hotel/motel.

Non-Paid accommodations include: non-paid home/apartment/condo, non-paid timeshare, other non-paid.

Hotel Levels	2009			2010			2011		
	Total	Florida Residents	Non-Florida Residents	Total	Florida Residents	Non-Florida Residents	Total	Florida Residents	Non-Florida Residents
High End	59%	45%	69%	63%	50%	70%	61%	48%	68%
Mid-Level	29%	40%	21%	25%	31%	22%	25%	32%	22%
Economy	12%	15%	10%	12%	18%	8%	14%	20%	10%

Note: Categories may not add to 100% due to rounding.

Reservation Information (all lodging types)	2009			2010			2011		
	Total	Florida Residents	Non-Florida Residents	Total	Florida Residents	Non-Florida Residents	Total	Florida Residents	Non-Florida Residents
Hotel Chain Website	19%	32%	11%	23%	35%	17%	23%	28%	21%
Other Website	17%	16%	18%	19%	16%	20%	18%	14%	21%
Direct to Location	16%	15%	16%	17%	20%	15%	14%	21%	10%
800 Phone Number	11%	12%	11%	12%	7%	14%	8%	9%	7%
No Reservation	9%	13%	7%	9%	13%	8%	7%	11%	4%
Travel Agent	9%	1%	14%	9%	3%	12%	7%	3%	9%
Corporate Travel Dept.	1%	0%	2%	1%	1%	1%	1%	2%	1%
On-line	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other	17%	11%	21%	10%	4%	13%	22%	12%	27%

Note: Categories may not add to 100% due to rounding.



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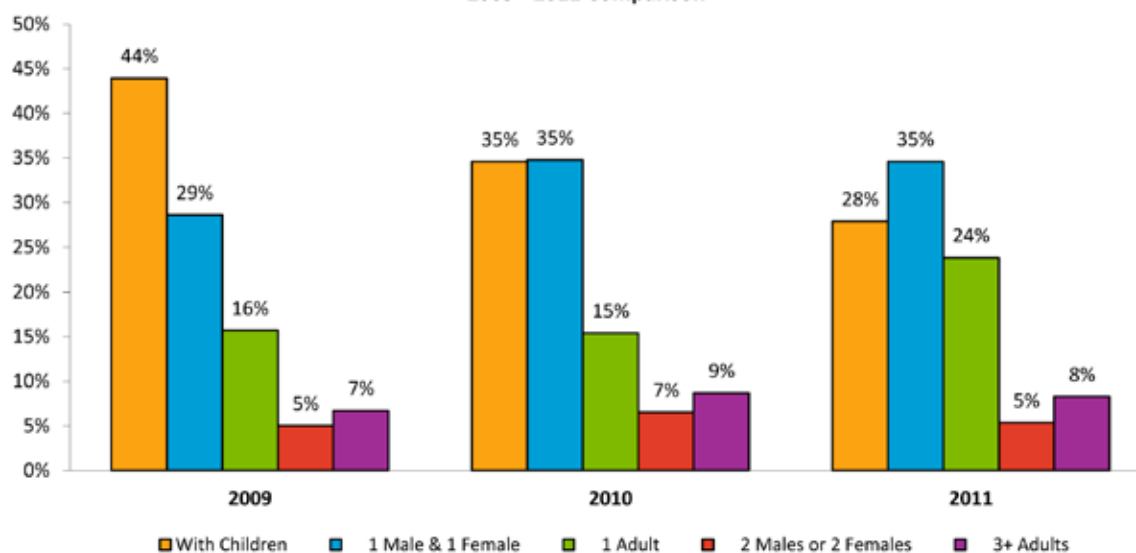
## Length of Stay

Length of Stay	2009			2010			2011		
	Total	Florida Residents	Non-Florida Residents	Total	Florida Residents	Non-Florida Residents	Total	Florida Residents	Non-Florida Residents
<b>AVERAGE NIGHTS</b> (all leisure visitors)	3.0	1.0	5.6	2.9	1.0	5.2	2.9	1.3	4.3
<b>AVERAGE NIGHTS</b> (overnight only)	4.3	2.2	5.8	4.4	2.3	5.5	3.9	2.4	4.6
Day-trip	32%	53%	4%	32%	56%	5%	26%	47%	7%
1 to 3 Nights	33%	41%	23%	32%	37%	26%	40%	46%	35%
4 to 7 Nights	27%	6%	56%	28%	7%	53%	30%	6%	50%
8+ Nights	7%	0%	17%	7%	0%	16%	4%	1%	7%

Note: Categories may not add to 100% due to rounding.

## Party Composition

2009 - 2011 Comparison



Party Composition	2009			2010			2011		
	Total	Florida Residents	Non-Florida Residents	Total	Florida Residents	Non-Florida Residents	Total	Florida Residents	Non-Florida Residents
<b>AVERAGE PARTY SIZE</b>	2.9	2.9	2.8	2.8	2.6	2.9	2.5	2.3	2.7
With Children	44%	49%	37%	35%	33%	36%	28%	21%	35%
Only Adults	56%	51%	63%	65%	67%	64%	72%	79%	65%
1 Male & 1 Female	29%	27%	31%	35%	31%	38%	35%	40%	29%
1 Adult	16%	13%	19%	15%	19%	11%	24%	25%	23%
2 Males or 2 Females	5%	6%	4%	7%	9%	4%	5%	6%	4%
3+ Adults	7%	6%	9%	9%	7%	10%	8%	8%	9%

Note: Categories may not add to 100% due to rounding.



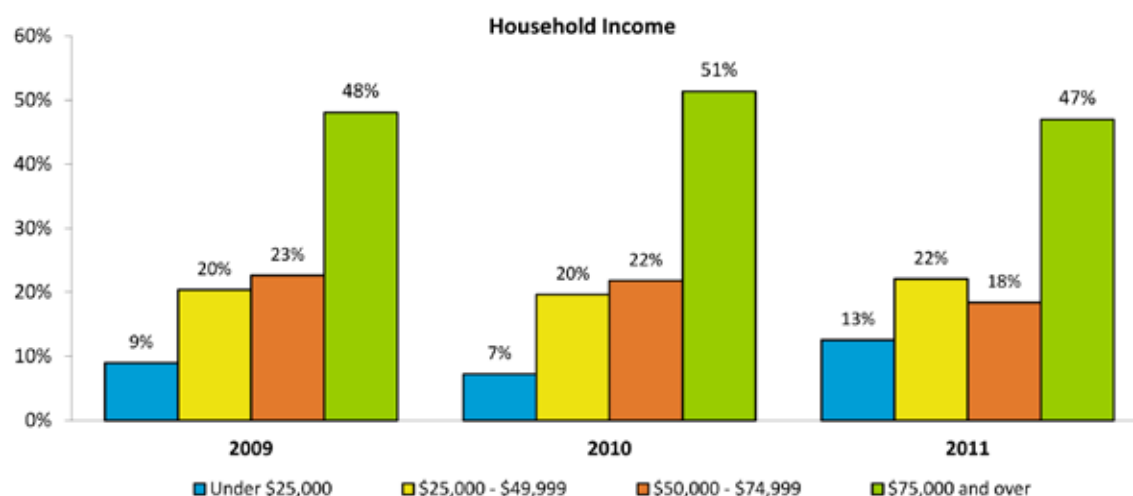
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## Household Income



Household Income	2009			2010			2011		
	Total	Florida Residents	Non-Florida Residents	Total	Florida Residents	Non-Florida Residents	Total	Florida Residents	Non-Florida Residents
<b>AVERAGE INCOME</b>	<b>\$83,616</b>	<b>\$74,094</b>	<b>\$96,617</b>	<b>\$89,315</b>	<b>\$79,156</b>	<b>\$101,002</b>	<b>\$83,799</b>	<b>\$68,187</b>	<b>\$96,617</b>
Under \$25,000	9%	11%	6%	7%	9%	5%	13%	19%	7%
\$25,000 - \$49,999	20%	24%	15%	20%	24%	15%	22%	29%	16%
\$50,000 - \$74,999	23%	25%	20%	22%	24%	19%	18%	18%	19%
\$75,000 and over	48%	39%	60%	51%	42%	62%	47%	34%	58%

## Household Composition

Household Size	2009			2010			2011		
	Total	Florida Residents	Non-Florida Residents	Total	Florida Residents	Non-Florida Residents	Total	Florida Residents	Non-Florida Residents
1 Member	6%	6%	6%	8%	10%	6%	8%	11%	5%
2 Members	25%	22%	28%	32%	33%	31%	33%	33%	32%
3 Members	25%	26%	24%	21%	22%	19%	20%	19%	21%
4 Members	28%	30%	25%	21%	16%	27%	23%	20%	25%
5+ Members	17%	17%	18%	18%	19%	17%	16%	16%	16%

Presence of Children in Household	2009			2010			2011		
	Total	Florida Residents	Non-Florida Residents	Total	Florida Residents	Non-Florida Residents	Total	Florida Residents	Non-Florida Residents
None	40%	36%	46%	59%	64%	52%	56%	59%	53%
One or More	60%	64%	54%	41%	36%	48%	44%	41%	47%
<b>Number of Children, among households with at least one</b>									
One Child	41%	42%	40%	39%	40%	38%	35%	33%	37%
Two Children	38%	39%	37%	41%	36%	44%	46%	51%	42%
Three Children	11%	5%	19%	17%	20%	15%	13%	12%	13%
Four Children	5%	6%	4%	3%	3%	2%	6%	3%	8%
Five Children	4%	7%	0%	0%	0%	0%	1%	2%	0%
Six Children	0%	0%	0%	0%	0%	0%	0%	0%	0%

# THE ENCLAVE HOTEL & SUITES

## 2013 MARKETING PLAN

### SITUATION ANALYSIS

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### International Visitation

International guests at our hotel have always been a key market segment for us making up almost 54% of our total business in 2012 and 99% of the total traditional wholesale business. There are many key characteristics of the International Market Segment that are extremely important to us to include length of stay and advanced booking periods. Below are some other important statistics that are contributing factors to the attractiveness of these visitors.

- Total international visitation to Orlando in 2011 was 3,803,000, a 3.5% increase compared to the 3,675,000 international visitors in 2010.
- Total overseas visitors (excluding Canada and Mexico) to Orlando was 2,788,000 in 2011.
- Of Orlando's 2011 overseas visitors, 30.5% were first-time visitors to the United States, up from 22.9% in 2010.
- The main purpose for visiting Orlando for the large majority of overseas visitors remains leisure/recreation/holiday (84.0%).
- Top activities among overseas visitors included shopping (92.5%), visiting amusement/theme parks (86.1%), and dining (83.3%) .
- Other U.S. destinations visited by Orlando's 2011 overseas visitors included Miami (32.04%), New York (18.0%), Tampa/St. Petersburg (5.9%), the Florida Keys (4.6%), and Washington D.C. (4.5%).
- The average age of adult overseas visitors to Orlando was 40.6. The majority of travel parties to Orlando were adults only (70.0%), while 30.0% traveled with children.
- Overall, the average party size was 2.3.
- The average household income was \$91,800.
- Nearly a quarter of overseas visitors (23.5%) reported that they used a package on their trip to Orlando. Of those who did purchase a package, the most common packages included air and lodging (15.1%) or air and rental car (13.5%).
- On average, overseas travelers made their trip decision 4.7 months prior to their visit (up from 4.6 in 2010) and they made their airline reservations 3.6 months in advance (unchanged from 2010).
- Personal computers (47.3%) remained the top source of information for planning a trip in 2011, down from 48.6% in 2010 and 47.9% in 2009. Other information sources included travel agencies (42.1%), airlines (22.4%), friends and relatives (20.6%), travel guides (7.7%), tour companies (5.9%), and state/city travel office (3.1%).
- The average length of stay among overseas visitors was 9.0 nights in Orlando, unchanged from 2010.

# THE ENCLAVE HOTEL & SUITES

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- Overseas visitors spent an average of 17.3 nights total in the U.S., up from 16.8 nights in 2010.
- Overseas visitors spent approximately \$1,115 per person per trip in Orlando, up from \$997 per person in 2010.

Following are interesting and detailed statistics and comparisons about overseas visitors to Orlando from the United Kingdom, Germany, and Brazil. As you will have noted from the makeup of the International Wholesale segment performance these are regions we have seen the greatest volumes of business and or the greatest growth in 2012.

#### United Kingdom

- Orlando received an estimated 767,000 visitors from the United Kingdom in 2011, an decrease of 8.6% from 2010. Visitors from the U.K. still accounted for 27.5% of Orlando's overseas visitors.
- The overwhelming majority of U.K. travelers (92.5%) visited Orlando for leisure/recreation/holiday purposes.
- More Orlando visitors from the United Kingdom (41.3%) used a travel package compared to 23.5% among all overseas visitors.
- On average, each visitor from the U.K. spent \$970 in Orlando for an estimated visitor spending of \$744 million.
- More visitors from the United Kingdom traveled with children (36.3%) than did overseas visitors overall (30.0%).
- U.K. visitors stayed an average of 12.2 nights in Orlando, longer than visitors from either Germany (4.8) or Brazil (9.6).

#### Germany

- Visitors from Germany were likely to travel to Orlando without children (84.3%), and were more likely to travel alone (25.0%) and with business associates (2.5%) compared to all overseas travelers.
- 13.0% of Germans' main purpose for the trip was business or attending a convention. This is higher than the average of 6.3% for all overseas visitors.
- Germans stayed an average of 4.8 nights in Orlando, even though they spent the most average nights in the United States (17.9 nights). Other popular U.S. destinations visited by Germans included Miami (41.5%), the Florida Keys (24.3%), Ft. Myers (17.8%) and New York (13.9%)
- Majority of Germans (87.5%) chose not to use a trip package to visit Orlando in 2011, which is higher than the overseas average of 76.5%.

# THE ENCLAVE HOTEL & SUITES

## 2013 MARKETING PLAN

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##### Brazil

- Brazil had more first time visitors to the U.S. (34.6%) than either the U.K. or Germany.
- Brazilians made their travel plans only 4.0 months in advance, compared to the average of all overseas visitors who planned 4.7 months in advance.
- Visitors from Brazil were far more likely to use an airline in the U.S. either to or from another city (41.4%), compared to 29.6% for all other overseas visitors
- Most Brazilians (53.4%) consulted a travel agency when making their trip plans, compared to 27.3% of Germans and 39.3% of U.K. residents. They were also more likely to consult their friends and relatives (29.3%) when planning a trip.
- Other U.S. destinations visited by Brazilians included Miami (37.2%), New York (33.13%) and Washington D.C. (3.8%).

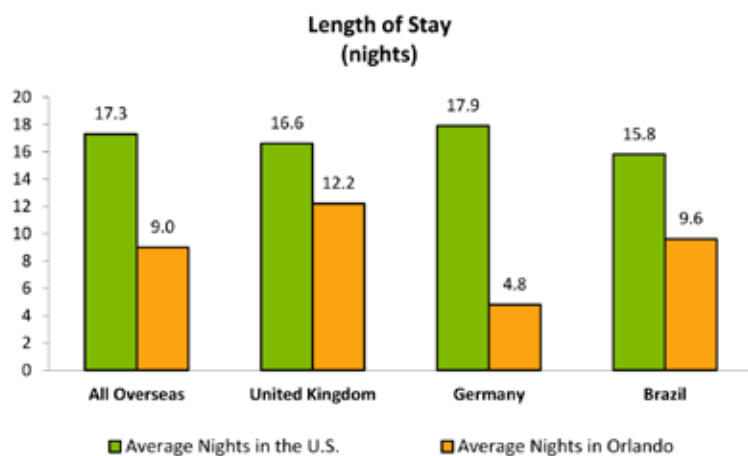
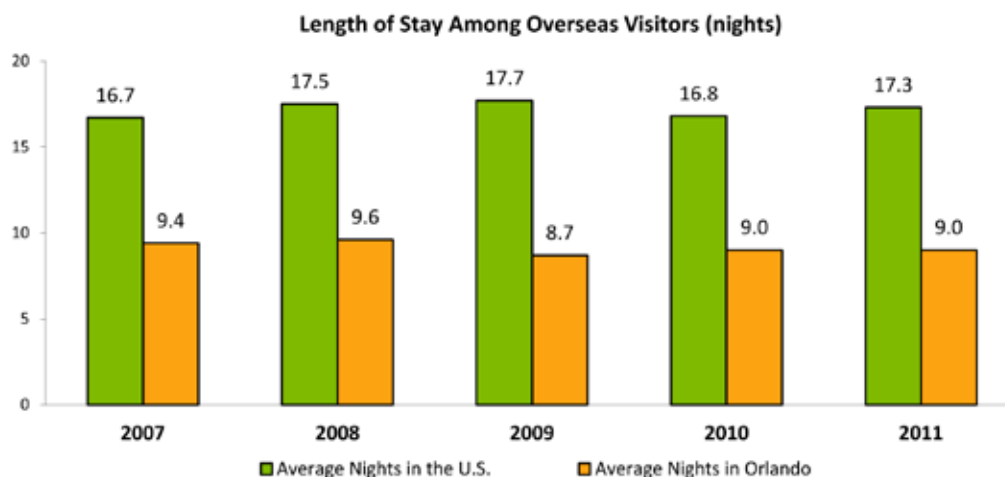
# THE ENCLAVE HOTEL & SUITES

## 2013 MARKETING PLAN

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#### MARKET SUMMARY & ANALYSIS

### Length of Stay



Overseas visitors in 2011 averaged 17.3 nights in the U.S. The average number of nights spent in Orlando remained unchanged from 2010 to an average of 9.0 nights.

Visitors from the U.K. spent the most nights in Orlando (12.2 nights).

Overseas visitors in Orlando on average are spending 52.0% of total trip in the destination, down from 53.6% in 2010.

Length of Stay	By Year			Country Comparison		
	2009	2010	2011	United Kingdom	Germany	Brazil
Average Nights in the U.S.	17.7	16.8	17.3	16.6	17.9	15.8
Average Nights in Orlando	8.7	9.0	9.0	12.2	4.8	9.6
% of U.S. Nights in Orlando	49.2%	53.6%	52.0%	73.5%	26.8%	60.8%

Compared to other purposes of trip, overseas leisure visitors spent more time in Orlando (9.0 nights).

Overseas visitors who traveled with children spent a greater portion of their trip to the U.S. in Orlando (62.4%) than parties without children (45.0%).

Length of Stay	Select Trip Characteristics						
	Orlando Only	Leisure	Business/ Conv.	First U.S. Trip	Repeat U.S. Trip	Adults Only	Adults w/ Children
Average Nights in the U.S.	14.3	16.7	22.4	17.6	17.0	19.8	14.9
Average Nights in Orlando	12.4	8.9	11.9	6.9	9.6	8.8	9.1
% of U.S. Nights in Orlando	86.7%	53.3%	53.1%	39.2%	56.5%	44.4%	61.1%

# THE ENCLAVE HOTEL & SUITES

## 2013 MARKETING PLAN

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### Admin Trip Decision

Overseas visitors to Orlando made their trip decisions on average 4.7 months in advance.

Among featured countries, German and Brazilian visitors made their trip decisions 4.4 and 4.0 months in advance, respectively. Visitors from the U.K. made their trip decision earliest, on average 6.5 months in advance.

Advance Trip Decision	By Year			Country Comparison		
	2009	2010	2011	United Kingdom	Germany	Brazil
Same Day	0.1%	---	0.1%	0.5%	---	---
1-3 Days	0.9%	0.6%	0.4%	0.6%	1.1%	0.3%
4-7 Days	2.1%	1.6%	1.6%	1.6%	1.9%	1.4%
8-14 Days	3.2%	2.8%	4.1%	3.6%	3.2%	2.2%
15-30 Days	17.3%	14.6%	13.3%	7.1%	11.4%	15.4%
31-60 Days	18.4%	16.9%	15.4%	8.6%	11.5%	15.3%
61-90 Days	10.9%	15.3%	11.8%	12.3%	12.7%	13.6%
91-120 Days	9.3%	9.7%	11.5%	8.1%	18.8%	14.3%
121-180 Days	15.7%	16.0%	19.7%	15.4%	19.0%	24.8%
181 or More Days	22.0%	22.4%	21.9%	42.3%	20.3%	12.6%
<b>Average Number of Days</b>	<b>132.1</b>	<b>138.3</b>	<b>141.2</b>	<b>193.9</b>	<b>130.5</b>	<b>121.4</b>
<b>Average Number of Months</b>	<b>4.4</b>	<b>4.6</b>	<b>4.7</b>	<b>6.5</b>	<b>4.4</b>	<b>4.0</b>

Business/convention visitors made their trip decision closer to the time of their trip than leisure visitors.

Visitors who traveled with children made their trip decision earlier (5.4 months) than those who traveled with adults only (4.0 months).

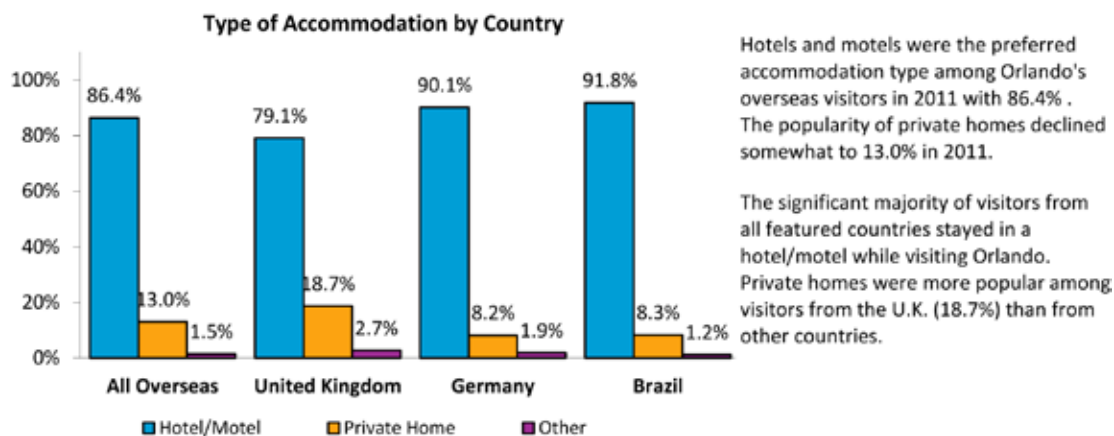
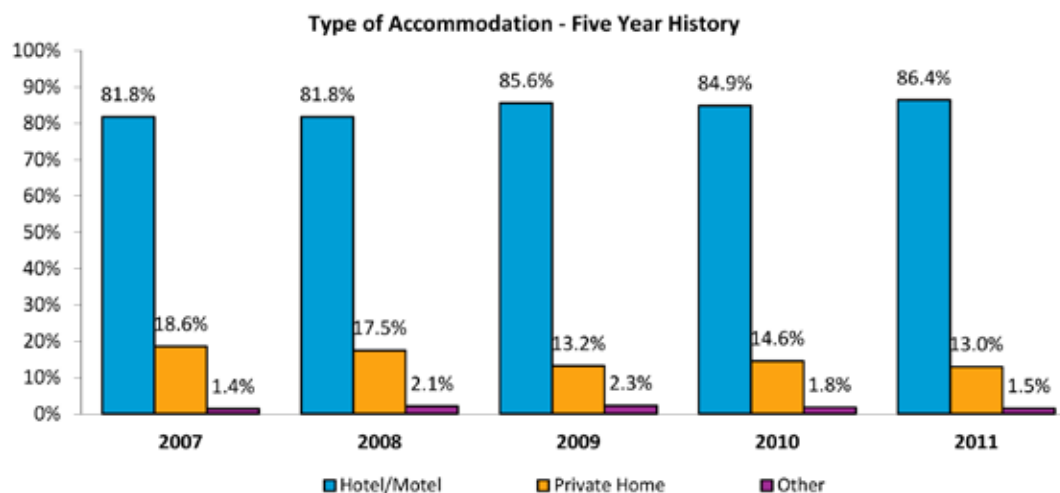
Advance Trip Decision	Select Trip Characteristics						
	Orlando Only	Leisure	Business/ Conv.	First U.S. Trip	Repeat U.S. Trip	Adults Only	Adults w/ Children
Same Day	0.4%	0.2%	---	0.1%	0.2%	---	0.3%
1-3 Days	0.7%	0.3%	0.8%	0.1%	0.4%	0.7%	0.2%
4-7 Days	2.6%	1.1%	7.5%	0.2%	2.1%	2.4%	0.7%
8-14 Days	3.7%	3.8%	13.5%	2.3%	4.4%	4.1%	4.2%
15-30 Days	12.9%	11.9%	21.8%	14.5%	12.7%	18.1%	8.6%
31-60 Days	12.9%	14.6%	23.3%	16.2%	16.1%	17.8%	12.9%
61-90 Days	11.4%	11.6%	10.6%	16.2%	9.6%	14.1%	9.5%
91-120 Days	9.6%	12.1%	5.1%	11.8%	12.1%	10.8%	12.2%
121-180 Days	17.3%	20.8%	7.7%	17.6%	19.9%	14.8%	24.7%
181 or More Days	28.5%	23.6%	9.6%	21.0%	22.4%	17.2%	26.7%
<b>Average Number of Days</b>	<b>154.5</b>	<b>148.3</b>	<b>75.5</b>	<b>139.3</b>	<b>142.4</b>	<b>119.8</b>	<b>162.7</b>
<b>Average Number of Months</b>	<b>5.2</b>	<b>4.9</b>	<b>2.5</b>	<b>4.6</b>	<b>4.7</b>	<b>4.0</b>	<b>5.4</b>

# THE ENCLAVE HOTEL & SUITES 2013 MARKETING PLAN

## SITUATION ANALYSIS

### MARKET SUMMARY & ANALYSIS

## Type of Accommodation



Type of Accommodation	By Year			Country Comparison		
	2009	2010	2011	United Kingdom	Germany	Brazil
Hotel/Motel	85.6%	84.9%	86.4%	79.1%	90.1%	91.8%
Private Home	13.2%	14.6%	13.0%	18.7%	8.2%	8.3%
Other	2.3%	1.8%	1.5%	2.7%	1.9%	1.2%

Note: Percentages add to more than 100% due to multiple response.

Type of Accommodation	Select Trip Characteristics						
	Orlando Only	Leisure	Business/ Conv.	First U.S. Trip	Repeat U.S. Trip	Adults Only	Adults w/ Children
Hotel/Motel	84.0%	87.0%	85.8%	92.9%	82.6%	86.0%	86.8%
Private Home	15.2%	12.2%	12.2%	5.8%	16.8%	13.6%	12.3%
Other	1.5%	1.5%	2.4%	2.1%	1.6%	1.5%	1.5%

Note: Percentages add to more than 100% due to multiple response.



# THE ENCLAVE HOTEL & SUITES

## 2013 MARKETING PLAN

### SITUATION ANALYSIS

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## Meetings/Convention & Business Travel

Convention/Meetings and Group Business Travel in Orlando saw an increase in 2012 of 7.7% over 2011 but, the outlook for this segment in 2013 is actually forecasting -8.9% for 2013.

According to an American Express survey (Dec 2012) of 200 U.S. based corporate financial officers. Sixty one percent of the respondents said they anticipate spending the same on business travel next year. Nearly two-thirds do not anticipate travel policies will loosen in the coming year, indicating that any additional travel investment will be closely watched.

In Orlando, according to the Rubicon report the 2013 committed group room nights is down the first five months of the year over 2012 with only June and August showing an increase over last year. The trend for actual booked group room nights for 2013 shows the same statistics. The trend shows corporate group travel is not booking as far in advance as in years past most research shows this is due to the recent fiscal cliff political issues causing concern and uncertainty at the end of 2012.

Business visitors accounted for 19% of Orlando's 2012 domestic travel, with 7% – 3.5 million visitors – directly tied to meetings, conventions and training events. Business travel provides an important source of revenue for Orlando with business visitors on average spending \$204 per day – significantly more than the average domestic overnight visitor at \$135.

#### Orlando annual visitor forecast growth

Orlando Visitor Forecast (year-to-year % growth)						
	2009	2010	2011	2012	2013	2014
<b>Total Visits</b>	-4.7%	10.5%	7.2%	2.2%	0.0%	2.0%
<b>Total Domestic Visits</b>	-4.8%	10.3%	7.5%	2.2%	-0.3%	1.8%
Business	-8.9%	2.0%	4.4%	3.1%	-1.2%	1.2%
Leisure	-3.7%	12.6%	8.3%	1.9%	-0.1%	2.0%
Day	-5.0%	9.6%	5.3%	1.5%	0.5%	1.3%
Overnight	-4.7%	10.7%	8.8%	2.5%	-0.8%	2.1%
Overnight Leisure	-3.3%	12.6%	9.8%	2.0%	0.0%	2.0%
Convention, Group, Meeting	-8.4%	1.4%	2.7%	7.7%	-8.9%	4.1%
Transient Business	-16.8%	0.4%	4.2%	0.6%	4.1%	0.4%
<b>Total International Visits</b>	-2.4%	12.6%	3.5%	3.4%	4.4%	4.1%
Canada	-4.9%	11.0%	5.7%	2.3%	2.1%	2.8%
Overseas	-1.4%	13.2%	2.7%	3.7%	5.3%	4.5%
UK	-13.3%	1.0%	-8.6%	1.4%	4.6%	4.1%
Other Overseas	6.4%	19.6%	7.7%	4.6%	5.5%	4.7%
<b>Hotel Room Demand (nights)</b>	-9.7%	9.1%	7.1%	3.3%	0.2%	3.0%

# MARKET BY SEGMENT

# THE ENCLAVE HOTEL & SUITES

## 2013 MARKETING PLAN

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#### MARKETING BY SEGMENT

## Internet Presence

With the close of 2012, staySky Hotels & Resorts launched a newly redesigned website for Enclave Suites, staySky Hotels & Resorts and staySky Resort Management. The process was long but, well worth it based upon our expected results. We began by hiring a consultant to review the current websites and design the framework of the new website for functionality and ease of use for the consumer. This framework was then sent to the website design team where they created a very appealing website that is also functional and easy to use for our guests. The new booking engine interfaces directly into the property management system which allows the reservations department to become more efficient and streamlined. The redesign included a redesign of the mobile site as well and we are in the final stages of adding a booking engine to our Facebook page. We continue to tweak and work on the website to add additional functionality and services for the guests, it will continue to be an evolving process in 2013.

The new website includes access to Google Analytics which will allow us to have a better understanding of where our customers are coming from and where to use internet marketing to its maximum potential. Thus, having a better understanding of online marketing that works and how we can improve our online marketing plans to maximize ROI. The company we chose to host our websites also manages our monthly paid search online. Search Engine Optimization insures EnclaveSuites.com has a strong internet presence and visibility on all the search engines, Google, Yahoo, etc. Our continued plan moving forward is to stay current with all webtrends and technology research allowing EnclaveSuites.com to continue its strong web presence throughout 2013 and beyond.

In 2012, traffic to EnclaveSuites.com was almost 285,000 visitors. Visitation to the website increased by almost 20,000 visits over 2011. We anticipate to greatly surpass these numbers for 2013 based upon all the research our consultants have completed and the growth they expect to see with the new updated site and internet marketing strategy.



# THE ENCLAVE HOTEL & SUITES

## 2013 MARKETING PLAN

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#### MARKETING BY SEGMENT

## E-COMMERCE

There is no conversation about **hotel marketing** these days that doesn't center on **hotel Internet marketing and the E-Commerce market segment**. In fact, gone are the days of marketing your hotel through magazines, directories and flyers. They still have their place and relevance but the first place guests go to book travel today is the Internet. Travel booked online was a 700 billion dollar industry last year (that's billion—with a capital "B"!), and that number is growing exponentially.

There are three major facets to E-commerce/hotel Internet marketing; web marketing, in the form of websites and online advertising, mobile and social. Today, the first place guests go to make travel plans is web search—usually using Google or Bing. It is therefore critical that the property has its own online web hotel marketing presence that is optimized with hotel Search Engine Optimization (SEO).

E-Commerce reservations come in two forms; E-Commerce Wholesale (such as through a 3rd party OTA i.e. Expedia, Travelocity, Orbitz) where commissions are paid to the source and then there is E-Commerce Direct (via hotels own website) where there are no commissions and a much greater opportunity for hotels to achieve higher rates and NO margins/commissions.

Recent data tells us that guests visit nine or more different websites when doing research for a trip—one of which will be the hotels own website. Guests make their way to the properties official site because they want to discover important information that they can't get on OTA site, like property photos, updated amenities, deals and promotions, local points of interest, and more. Even with a substantial percentage of the hotels bookings coming through OTAs, it is still important to have a web presence that you own where you can control your hotel's image and marketing message. Simply put, hotels need a modern, updated website designed to capture more direct guest business. The re-design of the EnclaveSuites.com site not only brings a crisp, fresh modern look but comes with functionality that will allow us to maximize all internet marketing opportunities.

In 2012 28.5% of the Enclave's overall revenues came through E-Commerce channels. Of that 20.33% was via E-commerce Wholesale (3rd party OTA's) and 8.17% via our own website enclavesuites.com - E-Commerce Direct

# THE ENCLAVE HOTEL & SUITES

## 2013 MARKETING PLAN

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### MARKETING BY SEGMENT

The E-commerce segment is growing and we cannot ignore the power of the Online Travel Agents (OTA's) ensuring placement, good reviews, updated content and participation in their ongoing promotional activities are essential to drive bookings. However, our focus and goal in 2013 is to grow this segment on the E-Commerce Direct side of the segment thus generating higher revenues and increased ADR for owners. The investment in the new site, SEO and through the study of performance measurements such as Google analytics will all contribute to achieving this goal.

# THE ENCLAVE HOTEL & SUITES

## 2013 MARKETING PLAN

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#### MARKETING BY SEGMENT

### SMERF Market

Student Groups, Sports Teams, Family Reunions, Religious Groups, Motorcoach, Adult Groups

The group sales team will continue to attend the major national tradeshows for the leisure group market. The American Bus Marketplace is one of our largest shows each year where we have prescheduled appointments with bus tour operators that bring groups into the Orlando area. The membership includes about 1,100 bus and tour operator companies that we have the opportunity to meet in addition to the prescheduled appointments. There are daily events and educational sessions during the marketplace show where we can exchange information with the buyer companies.

The other national show we attend is the National Tour Association. This association has about 650 tour operator members. We have prescheduled appointments and events, very much like the ABA show. They also have a “Destination Pavilion” where we partner with the Florida Convention & Visitors Bureaus to offer itineraries including our hotel to the operators that are planning Orlando tours. NTA is in Orlando in January 2013 and we have volunteered to assist in different areas, as well as attend the marketplace show.

We are still actively pursuing the Motorcoach tour market for business. staySky Hotels & Resorts is a member of Georgia Motorcoach Operators Association, Motorcoach Association of South Carolina, North Carolina Motorcoach Association, Virginia Motorcoach Association, Alabama Motorcoach Association and South Central Motorcoach Association. Each state hosts an annual marketplace show where we meet with each Motorcoach and tour operator member. In 2013, each state has joined another state to host their shows together in one location. This saves us travel time and expenses to be able to meet with more operators at each show.

The Student and Youth Travel Association also hosts an annual show where we meet with tour operators that plan trips mainly for student groups. The offer prescheduled appointments, educational sessions and events with the opportunity to get our hotel information to approximately 120 student tour operators. The student market has always been very productive for us, mainly performance groups coming to Orlando. Marching bands and chorus groups have many opportunities at Disney and Universal to perform at different venues, which attracts many school groups to our area.

In 2013, we are planning to attend at least one new tradeshow, Texas Bandmasters. This show draws a few hundred band and chorus directors to “shop” for venues and different travel components to put their school trips together. This show does not have prescheduled appointments but we would have a booth displaying our hotel. The directors

# THE ENCLAVE HOTEL & SUITES

## 2013 MARKETING PLAN

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#### MARKETING BY SEGMENT

can visit us and pick up information for their future group travel.

We will attend two religious market shows next year. RCMA, The Religious Conference Management Association, represents 800 different diverse religious organizations. These organizations are responsible for booking approximately 14,000 conventions, meetings, assemblies, and retreats which annually attract more than 11 million participants.

The second religious show we will attend is the Rejuvenate Marketplace. At this convention, the sales team is able to meet face to face with pre-qualified Religious Meeting Planners that are the decision makers for their organization at pre-set appointments. Many of these meeting planners have brought requests for proposals and are ready to book their hotels. We have seen many requests as a result of attending this show the past two years.

We increased our SMERF Market business in 2012, mainly in the Sports market. We are working with a local sports tour operator that handles many of the tournaments at Disney's Wide World of Sports and we get a lot of referral business from them. They also have some tournaments at the Orlando Convention Center and Orlando Sports Complex. They have increased the number tournaments again for 2013 and we will be a part of the preferred housing again.

A member of the sales team also attends the TEAMS Conference, the world's leading conference and expo for the sports event industry. We have the opportunity to meet with over 300 meeting planners in the sports industry. This show also held personal appointment sessions that allowed quality time with event organizers and industry leaders. In addition, the conference provided valuable networking sessions that help build strong relationships for today and the future.

We receive many repeat bookings in the reunion market, families and churches. The sports market has grown tremendously over the past couple of years, due mainly to teams referring other teams within their clubs to our hotel. They enjoy our hotel because of the larger rooms and kitchens because they tend to travel with several families for each tournament. The location of the hotel is perfect for all sectors of the leisure market because of its central location to all area theme parks and attractions.



# THE ENCLAVE HOTEL & SUITES

## 2013 MARKETING PLAN

SITUATION ANALYSIS

MARKETING BY SEGMENT

### Corporate/Government/Convention Markets

The sales team will be working diligently to secure additional corporate, government and convention business for 2013 as business travel to Orlando accounts for such a substantial number of visitors each year. There were 10.24 million business travelers hosted in Orlando in 2012 which is an increase of 3.1% on 2011. Our sales team will be participating in several tradeshow, as well as conducting sales calls both locally and statewide in an effort to be front of mind with meeting planners, and decision makers. They will also be working very closely with Visit Orlando to secure any opportunities for additional business.

The forecast for business travel in 2013 is similar to that of 2012 with an expected slight increase of 1.2% on 2012. Rate sensitivity it still a consideration, particularly in this market, so we will continue to focus on the tremendous value that our property offers. We will emphasize the benefits of booking meetings and corporate travel at our property by highlighting the space of our units, the ideal location as well as the included amenities (parking, WiFi etc.) Our property is also a great fit for business travelers as 30% of them bring their family or friends along when they travel to Orlando, and we are able to offer them much more than the average hotel room.

The sales team will continue to conduct sales calls and to reach out to both potential and current clients. We will continue to solicit new Government and Association accounts for 2013 also. The government per diem rates for 2013, which were recently released, remained unchanged for 2013.

The sales team will be attending the Meeting Spots Tradeshow this spring in Tallahassee, where we will be meeting with over 100 meeting planners from the Tallahassee/ Georgia areas. They will also be conducting sales calls in the Tallahassee area in order to reach out to the many association, and government offices that are based there. There are over 6,000 associations based in Florida, and of those over 1,700 are located in the Tallahassee area.

Convention business increased by 6.2% (YTD) in 2012, and is expected to increase again for 2012. We have not been included in many of the large convention blocks for 2012 due to the proximity of many newer hotels to the convention center. However, there is still the potential for overflow rooms from the larger conventions, and so we will continue to work very closely with Visit Orlando to secure as many room nights as we can.

# THE ENCLAVE HOTEL & SUITES 2013 MARKETING PLAN

## SITUATION ANALYSIS

### MARKETING BY SEGMENT

## Travel Agent/GDS

Synxsis (GDS), staySky Travel Agent Reward Program

staySky Hotels & Resorts work very closely with travel professionals throughout the US, Canada and beyond. We have been quite successful partnering with Visit Orlando and Visit Florida to travel to tradeshow and events arranged for travel agents to learn about Enclave Suites. This year we traveled to Canada with Visit Orlando and participated in a special Southeastern US trip with Visit Florida to meet home based and traditional agents and to explain our hotel and our Travel Agent Reward program.

The focus in 2013 is to grow this segment of our business. Travel agents continue to be an integral part of the hotel business. With the growth of the "OTA's" or Online Travel Agencies (ie; Expedia, Travelocity, etc) the general thought was that Travel Agents would no longer be necessary in the travel industry. This could not be further from the truth. We will continue to work closely with the travel professional to engage them and insure Enclave Suites is top of mind when their clients are booking Orlando.

We look forward to creating new opportunities and offers for travel agents in 2013 and to reach out to the agents on a weekly basis to insure they have the most current information to share with their clients. The staySky Travel Agent Rewards program will be revamped for 2013 to offer more for the travel professional and continuing education of our Orlando hotel.

**TRAVEL AGENT REWARDS - START EARNING REWARDS TODAY!**

**ENJOY 50% HIGHER COMMISSIONS - AND MUCH MORE!**

Give your clients the quality and value of staySky Hotels & Resorts - and be rewarded with our Travel Agent Rewards! Here's how it works:

- Sign up and receive 15% commission on all your staySky bookings - a 50% increase in commission!
- Receive 1 free night for every 10 bookings.
- Monthly rewards featuring deals and specials for your clients.
- Receive special travel agent discount rates when you stay with us.
- Added value at check-in for travel agents.

Reservations made from 12/1/2012 to 11/30/2013. The offer is valid during special events in Orlando and cannot be used in combination with other offers. Check with your reservations manager for all agent reward program restrictions and terms.

staySky Hotels & Resorts: An excellent choice for your clients

When you select staySky Hotels & Resorts for your clients, you can rest assured you've made the right choice. We make it easy to book it easy to Orlando, Disney Beach and the Caribbean!

Take care of your clients and reward yourself! Sign up online at [StaySky.com/AgentRewards](http://StaySky.com/AgentRewards) for our Travel Agent Rewards and start earning your rewards today!

For additional questions email: [StayTravelAgentRewards@staySky.com](mailto:StayTravelAgentRewards@staySky.com)

**staySky** HOTELS & RESORTS A Whole New Experience [staySky.com](http://staySky.com)

# THE ENCLAVE HOTEL & SUITES

## 2013 MARKETING PLAN

### SITUATION ANALYSIS

#### MARKETING BY SEGMENT

## Social Media

We will continue to focus heavily on our social media efforts in 2013 as social media still continues to grow. Facebook has continued to dominate social media and recently surpassed 1.01 billion users. Of those 1.01 billion people, there are 584 million active users each day. The average Facebook user has 130 friends so the reach is quite staggering. The second most popular social media platform is Twitter, which has over 500 million global users, one million of which joined this past year. There were 175 million tweets sent YTD in 2012, and even Pope Benedict XVI recently joined Twitter.

Our goal for 2013 is to continue our weekly schedule of posts and tweets in order to engage as many “followers” and “fans” as we can. We have implemented a weekly social media calendar for 2013 which outlines our messages and ideas for engagement, and which we will tie in with the companywide marketing efforts that are taking place at the same time. We will also continue to focus on the customer service side of social media by making sure that we are communicating effectively and in a timely manner with all of our “fans” and “followers.”

In addition, we will also be looking at other social media opportunities, including Pinterest. Pinterest has quickly become one of the top 10 social media platforms, and enables users to pin images and topics of interests to their online message boards. These images are then viewed by their followers, and travel destinations/ hotels are a popular source of pins. All images on Pinterest are also links which have become more effective than Google+, LinkedIn, and YouTube combined for driving traffic back to the product, or service provider’s website, and would serve as a very effective way to send traffic back to our property’s website.

We will also maintain our efforts on the Trip Advisor travel website for 2013. Trip Advisor is the #1 travel site in the world, and has over 60 million monthly users. It has become the most popular source of travel information and its’ members trust the information that they get on this website. We currently respond to each and every review that is posted on Trip Advisor which is something that few of our competitors do. We understand that Trip Advisor members rely on the reviews of fellow travelers when making travel decisions, and it is estimated that 72% of their users start their travel search on Trip Advisor before making any plans. As a result it is extremely important for us to have our guest’s review their stays. We will encourage our guests from the moment they arrive at the hotel that “we strive for 5’s” which is the highest Trip Advisor ranking. We will also respond to each and every review in a timely manner in order to illustrate our appreciation for feedback, and to encourage other guests to do the same.

# THE ENCLAVE HOTEL & SUITES

## 2013 MARKETING PLAN

SITUATION ANALYSIS

MARKETING BY SEGMENT

### International Wholesale - Group

Hotelbeds, Virgin Holidays, Thomas Cook, Action Travel, Kaluah Tours, Majestic Int.

Our wholesale team continues working closely with Tour Operators, Receptive, Travel Agents, Consumers, Visit Orlando and Visit Florida to insure our properties are first in mind for all new sales and marketing opportunities. Our sales team saw growth in all regions of this segment in 2012 at the Enclave and anticipate this will continue to grow as we move forward into 2013.

We will continue participating in major International and National tradeshow focusing on all International wholesale events such as **Americas Workshop, Anato, Florida Huddle, International Pow-Wow, ITB, Mission Mexico, Brazil's ABAV and World Travel Market**. Each one of these trade shows will help to develop new accounts, secure repeat business and increase revenue at all our properties. In the meantime, the sales team continues to conduct sales calls and to reach out to both potential and current clients locally and from all markets.

This winter 2012, we started a new business opportunity with Nascimento Turismo from Brazil working directly with them and their charter programs. There is great potential with this new account and we are excited to have been one of the properties selected to be featured in this program. This wonderful opportunity offers daily charter flights from São Paulo Brazil and the guest's average length of stay is 7 to 10 nights.

Because of the enormous potential from Latin America, the size of the region and the language barrier; in June 2012 we began a relationship with a dedicated agency based in Rio de Janeiro Brazil. The Agency represents our hotel throughout this region, giving us increased exposure, elevated brand recognition and of course a local office that travel agents and tour operators can call. The Agency will additionally provide call center & reservations training, represent us at Trade shows & sales missions and conduct educational workshops so that the hotel is a constant on the minds of the agencies and sure to be included in any consideration sets for future business opportunities.

This is a very exciting step which we took great time in researching and selecting the right Agency to represent us. We have already seen an increase in our business from this region and anticipate further growth in 2013 and beyond.

We have seen an increase in last-minute bookings from Puerto Rico, Brazil, Uruguay, Argentina and Mexico which helps fill any empty rooms and this is great last minute

# THE ENCLAVE HOTEL & SUITES

## 2013 MARKETING PLAN

### SITUATION ANALYSIS

#### MARKETING BY SEGMENT

business as the average length of stay is anywhere from 10 to 14 nights.

The UK wholesale segment increased slightly in 2012 which is an achievement in itself as the UK business into Orlando has struggled for the past 3 years. All signs for 2013 are positive and if our current pace is anything to go by we anticipate that we will see some good growth/recovery of previous bumper years from the UK. We receive a large number of bookings from repeat guests throughout the UK and Canada which is of course a positive testament to the hotel and the location. However, we are additionally seeing a growing number of comments and feedback regarding the standard of the rooms and the need to modernize/update and renovate in order to remain in these guests selection set.

### Wholesale Group

Wholesale group bookings saw a slight increase in 2012 but this is a difficult segment for us as the Wholesale group business is typically looking for a standard Hotel room type accommodation with 2 Double beds. Our relationships in the wholesale market certainly help us to secure wholesale group rooms but the competition is fierce and the rates offered by hotels with standard rooms are difficult for us to match from an all-Suite perspective.

# THE ENCLAVE HOTEL & SUITES 2013 MARKETING PLAN

SITUATION ANALYSIS

MARKETING BY SEGMENT

## Brazil Market & Agency





# THE ENCLAVE HOTEL & SUITES

## 2013 MARKETING PLAN

SITUATION ANALYSIS

MARKETING BY SEGMENT

### Penetration in Brazilian Key Markets through Trade Initiatives



Primary Markets

São Paulo

Rio de Janeiro

Belo Horizonte

Brasília



Secondary Markets

Curitiba

Vitória

Porto Alegre

Salvador

Recife

Florianópolis





# THE ENCLAVE HOTEL & SUITES 2013 MARKETING PLAN

SITUATION ANALYSIS

MARKETING BY SEGMENT

## Trade Initiatives

Periodic e-marketing to travel agents - develop high quality service reputation - use Agency and Trade newspapers data base.

Sales blitz to top travel agents for increased opportunities in their business – utilizing existing strong relationships.

Pursue T.O. to include Enclave Suites in existing key packages.

Word of mouth propaganda – use statements from travel agents that have used staySky Hotels & Resorts services as an example to reinforce brand credibility.

## Trade Shows Participation

CVC Workshop	Feb 20-21	12.000 Travel Agents
BRAZTOA/WTM	Apr 23-25	3.500 Travel Agents
Visit USA RIO/SAO	May 13-17	2.000 Travel Agents
Trend Workshop	Sep 04	7.000 Travel Agents
ABAV	Sep 05-08	11.000 Travel Agents



# THE ENCLAVE HOTEL & SUITES 2013 MARKETING PLAN

## SITUATION ANALYSIS

### MARKETING BY SEGMENT

## Public Relations - Media ROI

Press Releases to 300 journalists throughout Brazil.

US\$ 80,000 in media value including top trade vehicles.

32 million accesses online exposure in 6 months.

## PR Accomplishments Online - Trade

The screenshot shows a trade publication article from 'mercado&eventos', described as 'O PORTAL DO TURISMO BRASILEIRO'. The article is titled 'Stay Sky Hotels & Resorts investe no mercado brasileiro' and is written by Anderson Masetto. It features a photo of Rosely Valente and Jane Terra, representatives of Stay Sky Hotels & Resorts. The article discusses the company's investment in the Brazilian market, highlighting its properties in Orlando, Florida, and its focus on providing a family-friendly experience with amenities like breakfast and parking. A sidebar on the right lists various news items under the heading 'PLANTÃO DE NOTÍCIAS'.

**mercado&eventos**  
O PORTAL DO TURISMO BRASILEIRO

NOTÍCIAS ENTREVISTAS OPINIÕES FEIRAS E EVENTOS MULTIMÍDIA BLOGS

Últimas Notícias: Porto Bay Rio Internacional é incluído em ranking de hotéis

14:15 CVC

120 mil hotéis por todo o mundo e as melhores opções de aéreo.

Home > Notícias > Stay Sky Hotels & Resorts investe no mercado brasileiro

### Stay Sky Hotels & Resorts investe no mercado brasileiro

Por: Anderson Masetto, de Orlando

07/09 - 17:12

Rosely Valente e Jane Terra, da Stay Sky Hotels & Resorts

A Stay Sky Hotels & Resorts conta com sete propriedades em Orlando, nos Estados Unidos, sendo duas na International Drive, quatro em Lake Buena Vista e uma em Kissimmee. Os empreendimentos se destacam por contarem com acomodações espaçosas e voltadas para famílias. São desde suítes com quatro quartos, casas e estúdios. Além disso, a maioria conta com café da manhã e estacionamento inclusos nas diárias, que custam em média entre 99 e 250 dólares.

Para receber mais brasileiros, a rede passou a ser representada no Brasil por Jane Terra. O objetivo é aumentar o número de room nights geradas por turistas brasileiros em pelo menos 25%. Jane explicou que muitas operadoras do País já trabalham com o produto, mas o objetivo com a representação é dar mais segurança ao mercado brasileiro e crescer ainda mais. "Temos tarifas convidativas e uma série de facilidades, como transporte gratuito para os parques e internet grátis, além de café da manhã e estacionamento na maioria dos nossos empreendimentos", disse.

**PLANTÃO DE NOTÍCIAS**

- Feiras e Eventos : 13:09 - 13:38
- GBTA Anuncia três Conferências na América Latina em 2013
- Exterior : 13:09 - 13:45
- Chaplin estreia na Broadway
- Aviação : 13:09 - 13:52
- Tam recebe prêmio Marcas de Confiança na categoria aérea
- Hoteis : 13:09 - 13:43
- Porto Bay Rio Internacional é incluído em ranking de hotéis
- Feiras e Eventos : 13:09 - 13:34
- WTM terá palestras sobre problemas e desafios de negócios
- Estados : 13:09 - 13:04
- Maciel Convention & Visitors Bureau chega a 60 associados
- Agências e operadoras : 13:09 - 13:39
- CI comemora 24 anos e prepara eventos e ações promocionais
- Hoteis : 13:09 - 13:30
- Devine Mairing investe R\$ 1,7 milhões em melhorias

# THE ENCLAVE HOTEL & SUITES 2013 MARKETING PLAN

SITUATION ANALYSIS

MARKETING BY SEGMENT

## E-Marketing

Reached Over 1,500 Consumers



**Tarifas Excepcionais**

**Stay SKY**  
HOTELS & RESORTS

**Sua casa em Orlando!**

Uma nova maneira de se hospedar com a família em Orlando que os brasileiros já aprovaram!

Apartamentos e casas de 1,2,3 e 4 quartos com serviço de resort, cozinhas completas, sala de estar e jantar!

**Consulte seu Agente de Viagens!!**

[www.staysky.com](http://www.staysky.com)

**ITERRA**  
RECURSOS

Av. das Américas, 700 – 206B – Barra da Tijuca, Rio de Janeiro  
E-mail: [staysky@terra.com.br](mailto:staysky@terra.com.br)

The advertisement is a promotional flyer for Stay SKY Hotels & Resorts. It features a central text area with promotional messages and several small images of hotel buildings and pools. The top left has a starburst graphic with the text 'Tarifas Excepcionais'. The top center displays the 'Stay SKY' logo. Below the logo is the headline 'Sua casa em Orlando!'. The main body contains three paragraphs of text describing the hotel's offerings and a call to action. The bottom left shows the 'ITERRA' logo, and the bottom right provides contact information. The entire ad is framed by a blue border.



# THE ENCLAVE HOTEL & SUITES 2013 MARKETING PLAN

## SITUATION ANALYSIS

## MARKETING BY SEGMENT

## PR Accomplishments Newspapers

Reached Over 1,500 Consumers



## Brazil Market Strategies

Work closely with retail agencies and T.O. to reinforce staySky Hotels & Resort brand within trade market.

Utilize PR initiatives to raise consumers brand awareness.

Increase hotels visibility through participation in major trade shows in Brazil.

Increase hotels knowledge through training seminars to retail agents.

# THE ENCLAVE HOTEL & SUITES

## 2013 MARKETING PLAN

### SITUATION ANALYSIS

#### MARKETING BY SEGMENT

### Direct CRO

staySky Hotels & Resorts maintains and staffs a centrally located call center to support all reservation needs for the properties we manage. The call center serves as a hub for incoming business, handling inquiries and reservations request via phone, email and fax. All reservations made through the hotel website, our third party online agencies, travel agents, tour operators and marketing promotions are directed to the call center where the bookings are entered and confirmed. In addition our call center handles the call volume and distributes the calls to our agents from both our toll free and direct lines.

In 2011 we rolled out to the call center agents a program that allows the agents to offer attraction tickets. Each agent is now able to provide guests with a complete Orlando experience. By working with this program, the agents now have direct access to a full range of area attractions, sightseeing, car rentals, spa reservations and local activities at very competitive prices to our valued guests. The addition of this new “amenity” to offer our guests has been very well received in 2012 and in 2013 we expect to increase ticket and excursion sales further.

To assist with a successful hiring and retention program, the department’s director and manager created and incorporated a new hire question form, a detailed overview of the role of a reservation agent and made enhancements to the current training manual. Training classes usually consist for three weeks classroom training followed by two weeks hands-on experience, prior to an agent graduating from training. Furthermore, to build competencies agents conduct visits to the properties regularly, and attend bi-monthly training sessions held by supervisors and various guest speakers.

Our commitment to quality and training continue, in 2013 we upgraded the phone system again this time giving us the ability to record all inbound reservation calls to insure guest service is at the utmost with every call. Every call is recorded, the department manager then selects a random sampling of call to evaluate and scored based upon an approved check list of objectives that have been developed for delivering excellent customer service and successful reservation conversions. The recorded calls and evaluations are reviewed with agents on a weekly basis.

9.12% of the resorts overall revenues in 2012 came through to ‘CRO’ Central Reservations Operation. This is a slight increase on 2011. The CRO is a vital piece of the overall booking functions as the amount of information provided to customers outside of making reservations demonstrates the need for constant contact and assistance to always be available. It further demonstrates our commitment to exceptional service delivery. In 2012 \$402,124.17 in reservations were made through direct calls to the ‘CRO’.

## Yield Management

Yield management is the process of understanding, anticipating and influencing consumer behavior in order to maximize yield or profits from a fixed, perishable resource (such as airline seats or hotel room reservations or advertising inventory). As a specific, inventory-focused branch of revenue management, yield management involves strategic control of inventory to sell it to the right customer at the right time for the right price.

The strategic levers of yield management can be summarized as four Cs: namely, calendar, clock, capacity, and cost. They are bound together by a fifth C: the customer. The strategic levers of yield management are geared to matching service timing and pricing to customers' willingness to pay for service in relation to its timing. Based on customers' demand levels and characteristics, management can shift the demand of those customers who are relatively price sensitive but time insensitive to off-peak times. Shifting that demand clears prime times for customers who are relatively time sensitive but price insensitive.

At staySKY Hotels & Resorts we use these yield management techniques to manage our rates and grow REVPAR (Revenue per Available Room), a key indicator of a hotels performance. Our revenue management team includes an e-commerce analyst whose full time responsibility is to review and manage the rates and occupancy across all channels using the strategic levers 'calendar, clock, capacity and cost'. The team meets biweekly to discuss pace pickup and demand and work together towards maximizing the revenue performance of each resort on a daily basis. As well, by continuously reviewing and analyzing each property's competitive set, we are able to ensure alignment within their respective market.

# LATEST RESEARCH



# THE ENCLAVE HOTEL & SUITES 2013 MARKETING PLAN

SITUATION ANALYSIS

LATEST RESEARCH

## Orlando Visitation

### Visitor Snapshot

Visitor Volumes (millions)	2007	2008	2009	2010	2011	11/10
<b>Total</b>	<b>48.745</b>	<b>48.888</b>	<b>46.583</b>	<b>51.455</b>	<b>55.168</b>	<b>5.5%</b>
<b>Domestic</b>	<b>45.907</b>	<b>45.515</b>	<b>43.319</b>	<b>47.780</b>	<b>51.365</b>	<b>5.7%</b>
Leisure	35.334	35.282	33.992	38.263	41.432	5.7%
Business	10.574	10.233	9.326	9.517	9.933	5.5%
<b>International</b>	<b>2.838</b>	<b>3.343</b>	<b>3.264</b>	<b>3.675</b>	<b>3.803</b>	<b>3.0%</b>
Canada	.783	.910	.865	.960	1.015	3.3%
Overseas	2.055	2.433	2.399	2.715	2.788	2.3%
U.K.	.990	.959	.831	.839	0.767	-1.8%



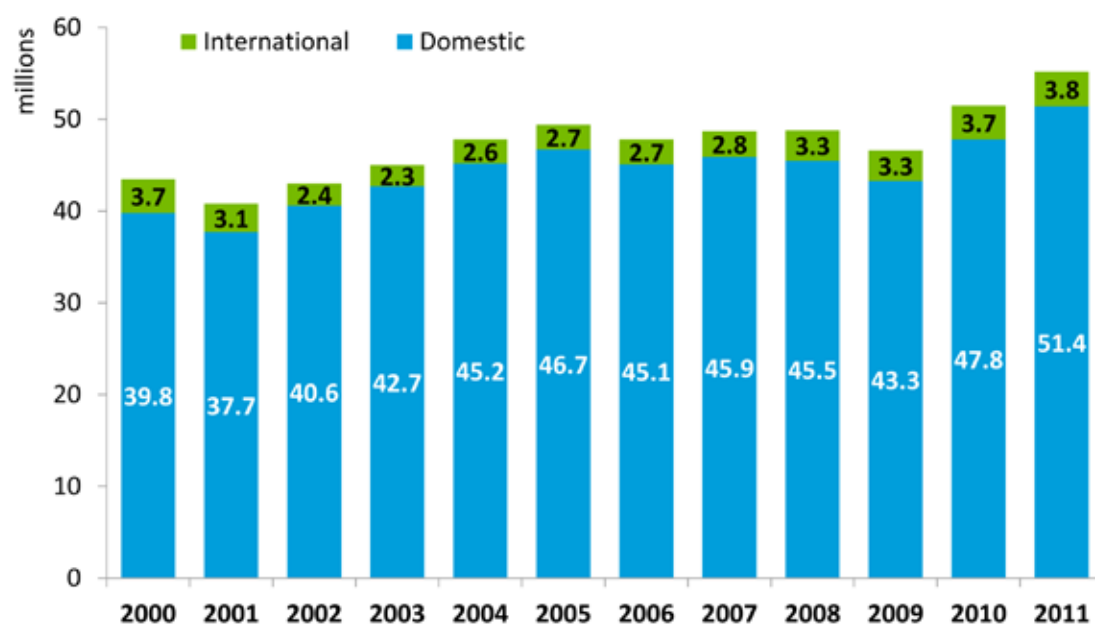
Source: D.K. Shifflet & Associates; Office of Travel & Tourism Industries

# THE ENCLAVE HOTEL & SUITES 2013 MARKETING PLAN

SITUATION ANALYSIS

LATEST RESEARCH

## Metro Orlando Visitor Volume

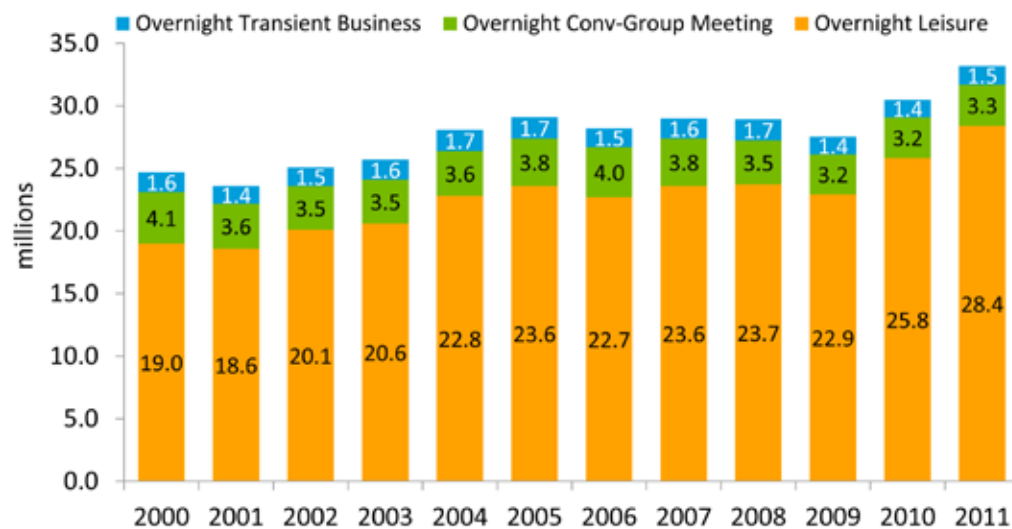


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HOTELS & RESORTS

Sources: D.K. Shifflet & Associates, Office of Travel & Tourism Industries

## Overnight Domestic Visitors

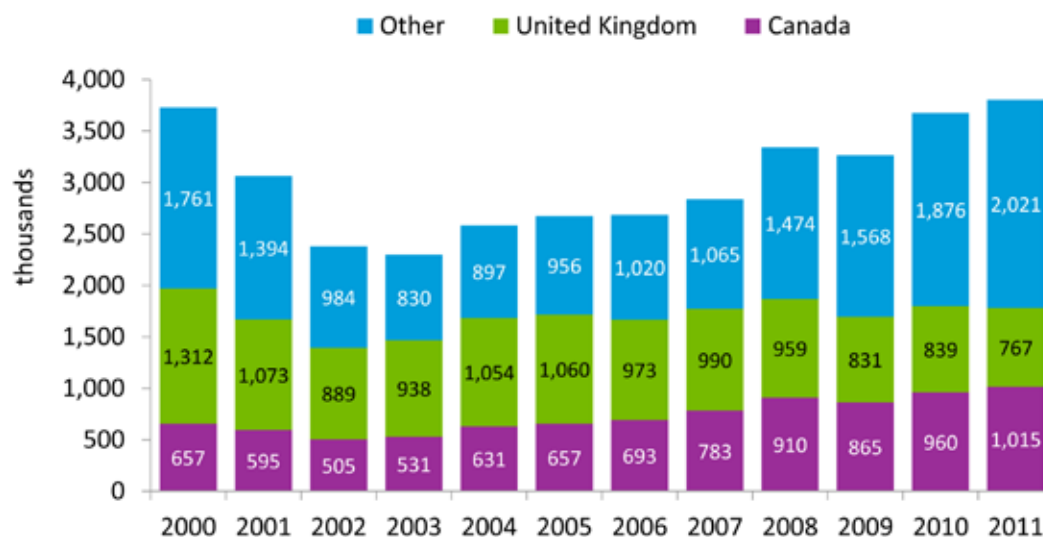
Over night visitors account for over two-thirds (65%) of all domestic visitors. Leisure travelers represent 86% of domestic overnight visitors.



Source: D.K. Shifflet & Associates

## International Visitors

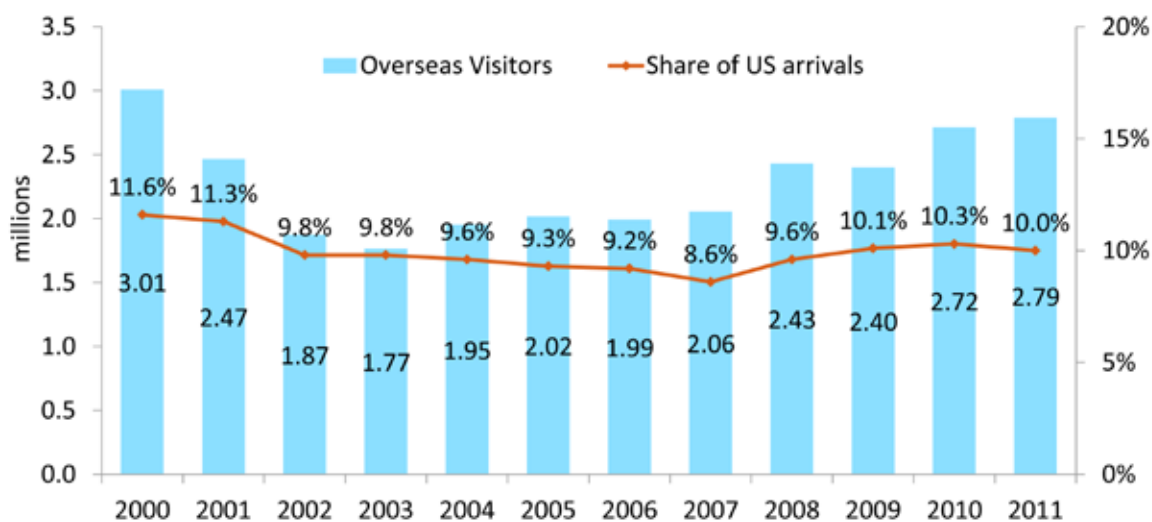
The United Kingdom's share of international visitors has declined from 35% in 2000 to 20% 2011.



Sources: Visit Orlando®, US Department of Commerce, Office of Travel & Tourism Industries

## Overseas Visitor and U.S. Market Share

Overseas visitors (excluding Canada & Mexico) to Orlando increased in 2011, although Orlando's share of overseas arrivals to the U.S. decreased minutely.



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Source: US Department of Commerce, Office of Travel & Tourism Industries

# THE ENCLAVE HOTEL & SUITES 2013 MARKETING PLAN

SITUATION ANALYSIS

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## U.S. Arrivals from Key Overseas Markets\*

U.S. arrivals from the United Kingdom continues to decline, while South American origin markets are showing strong growth.

	2008	2009	2010	2011	11/10	YTD April 2012	12/11
<b>Total Overseas</b>	<b>25,341,451</b>	<b>23,756,184</b>	<b>26,362,616</b>	<b>27,883,157</b>	<b>+11.0%</b>	<b>8,532,556</b>	<b>+9.7%</b>
Western Europe	12,198,081	10,978,668	11,378,767	11,986,795	+5.3%	3,389,570	2.5%
U.K.	4,565,000	3,899,167	3,850,864	3,835,300	-0.4%	1,087,102	-1.5%
Germany	1,782,000	1,686,825	1,726,193	1,823,797	+5.7%	529,290	+10.7%
Brazil	769,000	892,611	1,197,866	1,508,279	+25.9%	545,812	+19.7%
Colombia	419,000	424,526	494,739	496,814	+0.4%	141,319	+15.5%
Argentina	318,000	356,428	436,192	512,258	+17.4%	202,770	+22.8%



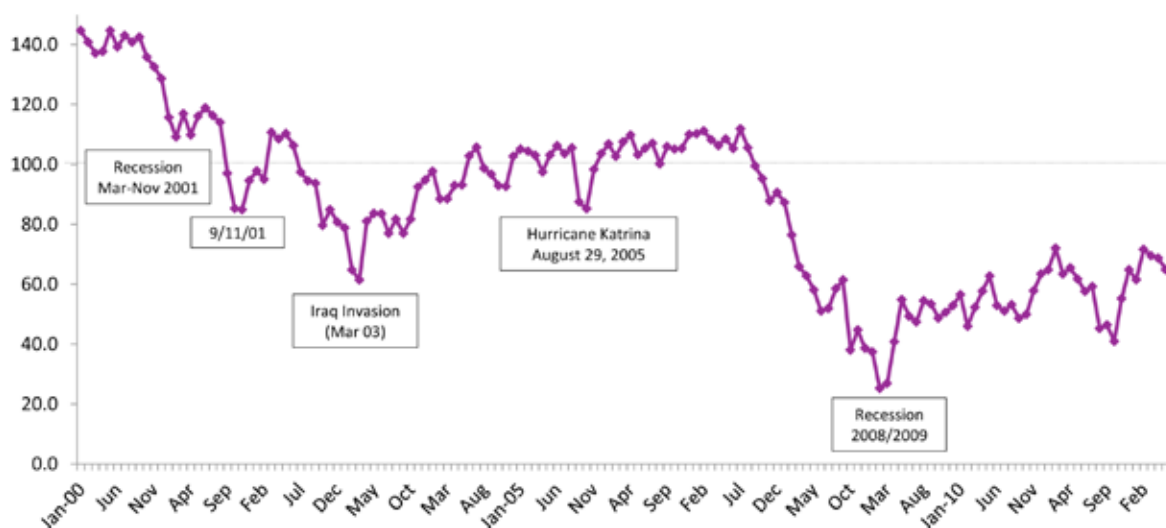
\* The Office of Travel & Tourism Industries (US Department of Commerce) only releases year-end destination figures; monthly data is only available at the U.S. level.

Source: US Department of Commerce, Office of Travel & Tourism Industries

## Economic Indicators

## Consumer Confidence Index

The Consumer Confidence has increased compared to 8 months ago, but still remains below levels associated with healthy economy (90 indicates the economy is stable, 100 or above indicates strong growth.)



*Stay*  
**SKY**  

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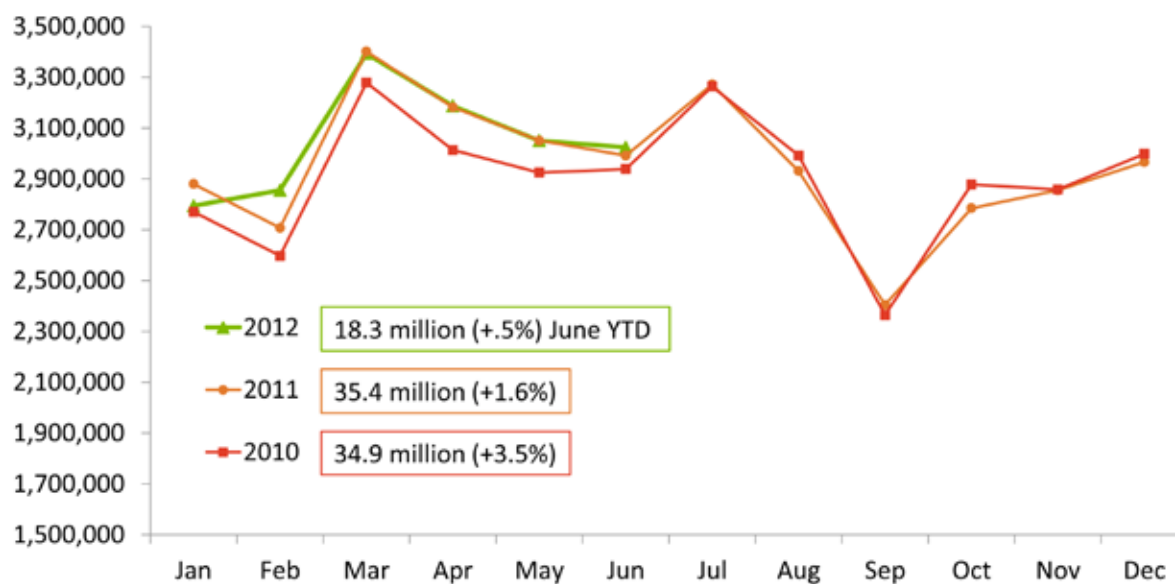
**HOTELS & RESORTS**

Source: The Conference Board



## Market Performance Indicators

### Orlando International Airport Passenger Traffic



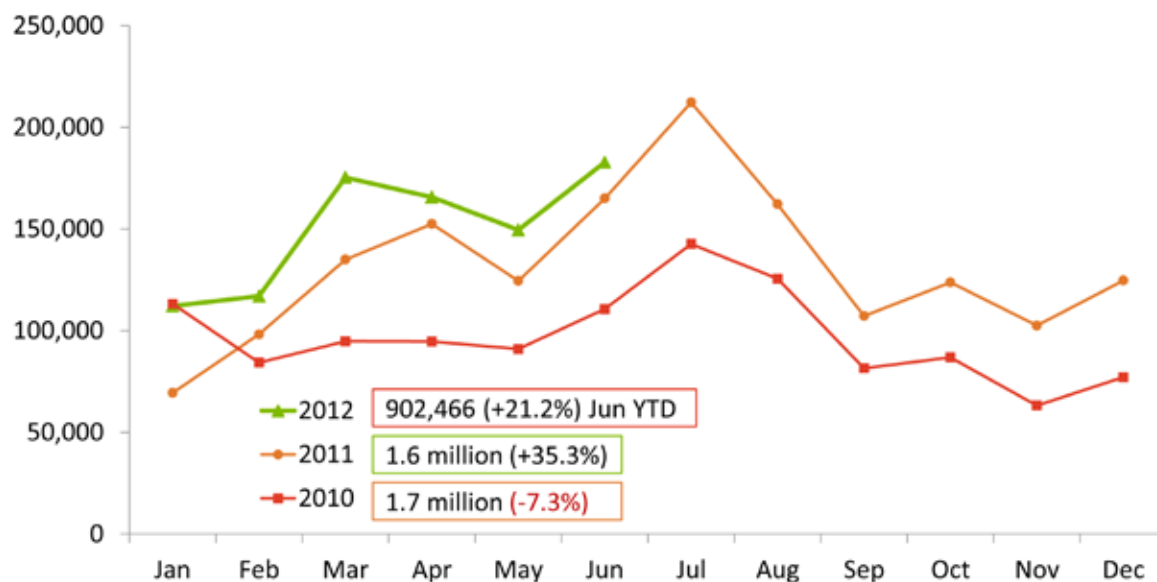
Source: Greater Orlando Aviation Authority

# THE ENCLAVE HOTEL & SUITES 2013 MARKETING PLAN

SITUATION ANALYSIS

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## Orlando-Sanford International Airport Passenger Traffic



Note: Allegiant Air moved services to OIA in 2010, and returned all services to Sanford in 2011.

Source: Sanford Aviation Authority

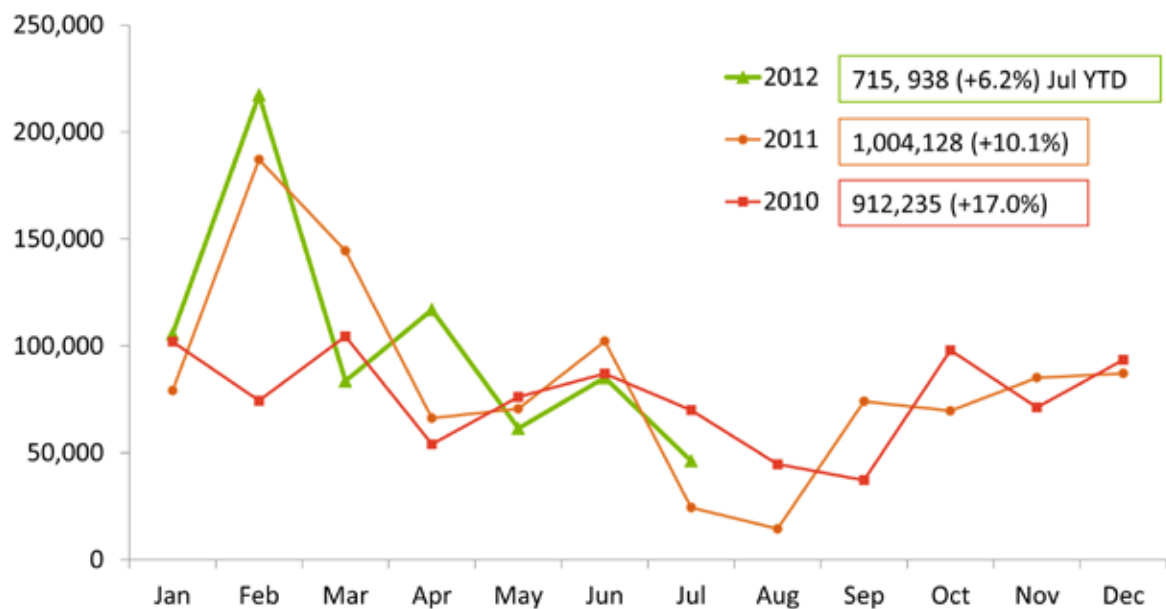


# THE ENCLAVE HOTEL & SUITES 2013 MARKETING PLAN

SITUATION ANALYSIS

LATEST RESEARCH

## Orange County Convention Center Convention & Tradeshow Attendance\*



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\*Excludes some consumer shows, tickets events, meetings and banquets held at OCC

Source : Orange County Convention Center

# THE ENCLAVE HOTEL & SUITES 2013 MARKETING PLAN

SITUATION ANALYSIS

LATEST RESEARCH

## Lodging Results

2012 June YTD	Orange County		Metro Orlando		Florida		National	
Demand (% change)	2.0%		4.0%		3.3%		3.7%	
Occupancy*	75.5%	0.9%	72.8%	2.8%	69.2%	3.4%	61.0%	3.4%
Average Daily Rate*	\$110.11	3.7%	\$102.51	3.4%	\$120.85	4.7%	\$105.13	4.4%
RevPAR*	\$83.17	4.6%	\$74.61	6.3%	\$83.61	8.3%	\$64.12	8.0%

\*Occupancy, ADR & RevPAR from Smith Travel Research does not include Disney-owned hotels or alternative forms of accommodations such as vacation homes, timeshares, or campgrounds.



Source: Smith Travel Research; Visit Orlando® Market Research & Insights

# THE ENCLAVE HOTEL & SUITES 2013 MARKETING PLAN

SITUATION ANALYSIS

LATEST RESEARCH

## Visitor Forecast

### Orlando annual visitor forecast levels

<b>Orlando Visitor Forecast</b> (millions)						
	2009	2010	2011	2012	2013	2014
<b>Total Visits</b>	<b>46.58</b>	<b>51.46</b>	<b>55.17</b>	<b>56.40</b>	<b>56.41</b>	<b>57.53</b>
<b>Total Domestic Visits</b>	<b>43.32</b>	<b>47.78</b>	<b>51.37</b>	<b>52.47</b>	<b>52.31</b>	<b>53.26</b>
Business	9.33	9.52	9.93	10.24	10.12	10.24
Leisure	33.99	38.26	41.43	42.23	42.19	43.02
Day	15.77	17.28	18.19	18.47	18.56	18.80
Overnight	27.55	30.50	33.17	34.01	33.75	34.46
Overnight Leisure	22.94	25.84	28.37	28.94	28.94	29.51
Convention, Group, Meeting	3.20	3.24	3.33	3.58	3.27	3.40
Transient Business	1.41	1.42	1.48	1.48	1.55	1.55
<b>Total International Visits</b>	<b>3.26</b>	<b>3.68</b>	<b>3.80</b>	<b>3.93</b>	<b>4.10</b>	<b>4.27</b>
Canada	0.87	0.96	1.02	1.04	1.06	1.09
Overseas	2.40	2.72	2.79	2.89	3.04	3.18
UK	0.83	0.84	0.77	0.78	0.81	0.85
Other Overseas	1.57	1.88	2.02	2.11	2.23	2.33
<b>Hotel Room Demand (nights)</b>	<b>24.33</b>	<b>26.55</b>	<b>28.42</b>	<b>29.36</b>	<b>29.41</b>	<b>30.30</b>

1

TOURISM ECONOMICS

# THE ENCLAVE HOTEL & SUITES 2013 MARKETING PLAN

SITUATION ANALYSIS

LATEST RESEARCH

## Orlando annual visitor forecast growth

Orlando Visitor Forecast (year-to-year % growth)						
	2009	2010	2011	2012	2013	2014
<b>Total Visits</b>	<b>-4.7%</b>	<b>10.5%</b>	<b>7.2%</b>	<b>2.2%</b>	<b>0.0%</b>	<b>2.0%</b>
<b>Total Domestic Visits</b>	<b>-4.8%</b>	<b>10.3%</b>	<b>7.5%</b>	<b>2.2%</b>	<b>-0.3%</b>	<b>1.8%</b>
Business	-8.9%	2.0%	4.4%	3.1%	-1.2%	1.2%
Leisure	-3.7%	12.6%	8.3%	1.9%	-0.1%	2.0%
Day	-5.0%	9.6%	5.3%	1.5%	0.5%	1.3%
Overnight	-4.7%	10.7%	8.8%	2.5%	-0.8%	2.1%
Overnight Leisure	<b>-3.3%</b>	<b>12.6%</b>	<b>9.8%</b>	<b>2.0%</b>	<b>0.0%</b>	2.0%
Convention, Group, Meeting	-8.4%	1.4%	2.7%	7.7%	-8.9%	4.1%
Transient Business	-16.8%	0.4%	4.2%	0.6%	4.1%	0.4%
<b>Total International Visits</b>	<b>-2.4%</b>	<b>12.6%</b>	<b>3.5%</b>	<b>3.4%</b>	<b>4.4%</b>	<b>4.1%</b>
Canada	-4.9%	11.0%	5.7%	2.3%	2.1%	2.8%
Overseas	-1.4%	13.2%	2.7%	3.7%	5.3%	4.5%
UK	-13.3%	1.0%	-8.6%	1.4%	4.6%	4.1%
Other Overseas	6.4%	19.6%	7.7%	4.6%	5.5%	4.7%
<b>Hotel Room Demand (nights)</b>	<b>-9.7%</b>	<b>9.1%</b>	<b>7.1%</b>	<b>3.3%</b>	<b>0.2%</b>	<b>3.0%</b>

# THE ENCLAVE HOTEL & SUITES 2013 MARKETING PLAN

SITUATION ANALYSIS

LATEST RESEARCH

## Orlando quarterly visitor forecast levels

<b>Orlando Visitor Forecast</b> (millions)								
	2011				2012			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
<b>Total Visits</b>	<b>15.23</b>	<b>12.85</b>	<b>11.52</b>	<b>15.56</b>	<b>15.44</b>	<b>13.17</b>	<b>11.90</b>	<b>15.90</b>
<b>Total Domestic Visits</b>	<b>14.15</b>	<b>11.86</b>	<b>10.66</b>	<b>14.69</b>	<b>14.32</b>	<b>12.16</b>	<b>11.01</b>	<b>14.99</b>
Business	3.09	2.53	2.45	1.87	3.16	2.61	2.52	1.95
Leisure	11.06	9.34	8.22	12.82	11.15	9.55	8.49	13.05
Day	4.97	4.09	4.15	4.99	5.00	4.17	4.27	5.03
Overnight	9.19	7.77	6.51	9.70	9.32	7.98	6.74	9.96
Overnight Leisure	7.75	6.57	5.43	8.61	7.80	6.71	5.62	8.81
Convention, Group, Meeting	1.05	0.80	0.72	0.76	1.13	0.87	0.76	0.82
Transient Business	0.38	0.40	0.36	0.33	0.39	0.40	0.36	0.33
<b>Total International Visits</b>	<b>1.08</b>	<b>0.99</b>	<b>0.86</b>	<b>0.87</b>	<b>1.12</b>	<b>1.02</b>	<b>0.89</b>	<b>0.91</b>
Canada	0.41	0.25	0.15	0.21	0.42	0.26	0.15	0.21
Overseas	0.67	0.74	0.71	0.67	0.70	0.76	0.74	0.70
UK	0.15	0.21	0.21	0.20	0.14	0.21	0.22	0.21
Other Overseas	0.52	0.53	0.50	0.47	0.55	0.55	0.52	0.49
<b>Hotel Room Demand (nights)</b>	<b>7.47</b>	<b>7.27</b>	<b>6.86</b>	<b>6.82</b>	<b>7.83</b>	<b>7.45</b>	<b>7.06</b>	<b>7.01</b>



# THE ENCLAVE HOTEL & SUITES 2013 MARKETING PLAN

SITUATION ANALYSIS

LATEST RESEARCH

## Orlando quarterly visitor forecast growth

<b>Orlando Visitor Forecast</b> (year-to-year % growth)								
	2011				2012			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
<b>Total Visits</b>	<b>10.2%</b>	<b>9.4%</b>	<b>6.2%</b>	<b>3.5%</b>	<b>1.3%</b>	<b>2.5%</b>	<b>3.2%</b>	<b>2.2%</b>
<b>Total Domestic Visits</b>	<b>10.6%</b>	<b>9.9%</b>	<b>6.5%</b>	<b>3.6%</b>	<b>1.2%</b>	<b>2.5%</b>	<b>3.2%</b>	<b>2.1%</b>
Business	7.4%	6.3%	1.4%	1.1%	2.4%	3.2%	3.0%	4.2%
Leisure	11.6%	10.9%	8.1%	3.9%	0.8%	2.3%	3.3%	1.8%
Day	8.4%	8.5%	3.2%	1.7%	0.6%	1.9%	2.9%	0.9%
Overnight	11.9%	10.7%	8.7%	4.5%	1.5%	2.7%	3.4%	2.7%
Overnight Leisure	13.0%	11.7%	10.6%	5.2%	0.6%	2.2%	3.4%	2.3%
Convention, Group, Meeting	6.0%	7.4%	-1.0%	-2.3%	7.6%	8.3%	6.2%	8.4%
Transient Business	7.9%	1.0%	3.1%	5.0%	1.9%	1.2%	-0.8%	-0.1%
<b>Total International Visits</b>	<b>4.6%</b>	<b>3.4%</b>	<b>2.8%</b>	<b>2.9%</b>	<b>3.5%</b>	<b>3.0%</b>	<b>3.2%</b>	<b>3.8%</b>
Canada	6.0%	5.6%	5.4%	5.6%	2.6%	2.4%	2.1%	1.7%
Overseas	3.7%	2.7%	2.3%	2.1%	4.0%	3.2%	3.4%	4.4%
UK	-8.7%	-8.6%	-8.5%	-8.6%	-1.9%	1.0%	2.2%	3.4%
Other Overseas	7.9%	7.9%	7.7%	7.4%	5.6%	4.1%	3.9%	4.8%
<b>Hotel Room Demand (nights)</b>	<b>8.9%</b>	<b>7.9%</b>	<b>7.9%</b>	<b>3.5%</b>	<b>4.8%</b>	<b>2.6%</b>	<b>2.9%</b>	<b>2.8%</b>

# STAR REPORT

# THE ENCLAVE HOTEL & SUITES

## 2013 MARKETING PLAN

### SITUATION ANALYSIS

## Star Report

Tab 2 - Monthly Performance at a Glance - My Property vs. Competitive Set

Enclave Suites 6165 Carrier Dr Orlando, FL 32819-8254 Phone: (407) 351-1155

STR # 23872 ChainID: MgtCo: None Owner: None

For the Month of: November 2012 Date Created: December 19, 2012 Monthly Competitive Set Data Includes Subject Property

November 2012									
	Occupancy (%)			ADR			RevPAR		
	My Prop	Comp Set	Index (MPI)	My Prop	Comp Set	Index (ARI)	My Prop	Comp Set	Index (RGI)
Current Month	69.9	70.4	99.2	47.30	56.39	83.9	33.05	39.71	83.2
Year To Date	72.8	74.4	97.9	56.26	61.08	92.1	40.96	45.42	90.2
Running 3 Month	75.7	69.9	108.4	48.16	56.07	85.9	36.47	39.18	93.1
Running 12 Month	71.6	73.3	97.7	56.98	61.24	93.1	40.81	44.90	90.9

November 2012 vs. 2011 Percent Change (%)									
	Occupancy			ADR			RevPAR		
	My Prop	Comp Set	Index (MPI)	My Prop	Comp Set	Index (ARI)	My Prop	Comp Set	Index (RGI)
Current Month	-5.8	-1.9	-3.9	-2.8	-1.6	-1.2	-8.4	-3.5	-5.1
Year To Date	-10.5	-0.3	-10.2	-0.6	-0.3	-0.3	-11.0	-0.6	-10.4
Running 3 Month	-7.7	-1.7	-6.2	-2.3	-0.2	-2.1	-9.8	-1.9	-8.1
Running 12 Month	-9.6	-0.5	-9.1	-0.5	-0.6	0.1	-10.0	-1.2	-8.9

SMITH TRAVEL RESEARCH, Inc

# STRENGTHS & OPPORTUNITY ANALYSIS

# THE ENCLAVE HOTEL & SUITES

## 2013 MARKETING PLAN

### SITUATION ANALYSIS

#### STRENGTHS & OPPORTUNITY ANALYSIS

### Competitive Analysis

Hotel:	Best Western Plus Orlando Gateway Hotel
Number of Rooms:	297
Date Property Was Built:	1984
Distance from Hotel:	0.52 miles
Strengths:	Complimentary high speed internet in rooms (wired) Fitness Center Restaurant and cocktail lounge Pool bar (seasonal) Coffee shop / deli Meeting space Full business services Microwave, fridge and coffee maker Breakfast available (fee) Complimentary shuttle to Universal, Seaworld and Aquatica In room safes Tennis and Basketball Court
Weakness:	No balconies No kiddie pool Limited in room amenities Only 18 studio rooms have a sofa bed
Resort Fee:	\$3.50 per day.
Market:	Leisure, business and group

#### Overview / Conclusion

Newly renovated rooms with new beds, furniture and 37 inch plasma TV's. Great location, a couple of minutes' walk to Wet 'n' Wild. Although they are not an all-suite property they are a competitor due to location and brand affiliation.

# THE ENCLAVE HOTEL & SUITES

## 2013 MARKETING PLAN

### SITUATION ANALYSIS

#### STRENGTHS & OPPORTUNITY ANALYSIS

Hotel:	Comfort Inn and Suites Universal – Convention Center
Number of Rooms:	200
Date Property Was Built:	2001
Distance from Hotel:	0.26 miles
Strengths:	Complimentary hot breakfast Complimentary transportation to Universal, Seaworld , Wet ‘n’ Wild and Aquatica Complimentary WiFi Outdoor Pool Fitness Center Business Center Pillow top mattresses Guest laundry
Weakness:	No meeting space Only have a fridge, coffee maker and microwave No kiddie pool No balconies Some rooms offer a sleeper sofa Safe at front desk only
Resort Fee:	None
Market:	Leisure, business and group

#### Overview / Conclusion

Hotel has just finished a renovation 3 months ago with an attractive contemporary design.  
Great location for business and leisure travelers.

# THE ENCLAVE HOTEL & SUITES

## 2013 MARKETING PLAN

### SITUATION ANALYSIS

#### STRENGTHS & OPPORTUNITY ANALYSIS

Hotel:	La Quinta Inns and Suites Orlando, International Drive
Number of Rooms:	200
Date Property Was Built:	1985
Distance from Hotel:	0.89 miles
Strengths:	Complimentary continental breakfast (with hot items) Complimentary WiFi Outdoor pool and spa Flat screen HD TV's in all rooms Pillow top mattresses Lounge / Bar Full Service TIKI bar Games arcade Complimentary transportation to Disney.
Weakness:	Limited in room services No kiddie pool Do not have in room safes only available at the front desk. No balconies Exterior corridors
Resort Fee:	None
Market:	Leisure, business and group

#### Overview / Conclusion

Property was renovated two years ago and upgraded their mattresses and TV's. Very limited in room facilities only some rooms have microwaves and no fridges. Rooms can only be accessed by an exterior corridor and rooms do not have balconies. Hotel is in a great location.



# THE ENCLAVE HOTEL & SUITES

## 2013 MARKETING PLAN

### SITUATION ANALYSIS

#### STRENGTHS & OPPORTUNITY ANALYSIS

Hotel:	Quality Suites near Orange County Convention Center
Number of Rooms:	154
Date Property Was Built:	1992
Distance from Hotel:	0.21 miles
Strengths:	Complimentary breakfast buffet Complimentary transportation to Universal, Seaworld , Wet 'n' Wild and convention center Outdoor Pool Conference and Meeting Rooms Complimentary WiFi in public areas
Weakness:	Limited meeting space for 45 people Only have a fridge, coffee maker and microwave No kiddie pool Do not have in room safes only available at the front desk. No balconies
Resort Fee:	None
Market:	Leisure, business and group

#### Overview / Conclusion

Great location, property is dated and no plans to renovate at the moment. Exterior room access only and there is a charge for wired internet access in rooms. Complimentary transportation to the convention center is a drawer for business travelers.

# THE ENCLAVE HOTEL & SUITES

## 2013 MARKETING PLAN

### SITUATION ANALYSIS

#### STRENGTHS & OPPORTUNITY ANALYSIS

Hotel:	The Point Orlando Resort
Number of Rooms:	210
Date Property Was Built:	2008
Distance from Hotel:	0.34 miles
Strengths:	WiFi in every room and all public areas (complimentary) Fitness Center Cabana Bar and Grill (poolside) A La Carte breakfast daily at lobby bistro (fee) Daily "Trash and Tidy" maid service (complimentary) Complimentary shuttle service to Universal, Seaworld and Wet 'n' Wild Keurig coffee makers in all rooms
Weakness:	Location Studio suites only have mini fridge, coffee maker and microwave No kiddie pool Do not have in room safes only available at the front desk.
Resort Fee:	\$12.38 per day.
Market:	Leisure, business and group

#### Overview / Conclusion

Very attractive décor but not in the best location and only has some views. Studio suites only have a mini fridge, coffee maker and microwave. They only have safes to rent at the front desk. Overall a very attractive property.

# THE ENCLAVE HOTEL & SUITES

## 2013 MARKETING PLAN

### SITUATION ANALYSIS

#### STRENGTHS & OPPORTUNITY ANALYSIS

### Our Property

Hotel:	The Enclave Suites
Number of Rooms:	321
Date Property Was Built:	1986
Strengths:	<ul style="list-style-type: none"><li>Complimentary “grab and go” snack breakfast</li><li>Food Court</li><li>Complimentary transportation to Universal, Seaworld and Wet ‘n’ Wild</li><li>Complimentary WiFi</li><li>Two outdoor pools and two kiddie pools and Jacuzzis</li><li>One indoor heated pool and Jacuzzi</li><li>Fitness Center</li><li>Guest laundry</li><li>Gift shop / Convenience store</li><li>Meeting space</li><li>Sky Kids Club (seasonal)</li><li>In room safes (nominal fee)</li><li>Games room</li><li>Tennis court, table tennis, basketball ½ court</li></ul>
Weakness:	<ul style="list-style-type: none"><li>No pool / resort bar</li><li>Dated décor and furnishings</li></ul>
Resort Fee:	None
Market:	Leisure, business and group

#### Overview / Conclusion

A firm favorite with many repeat guests but more comments on dated décor and furnishings and requests from guests and tour operators for a renovation of the hotel. A renovation would make this one of the most sought after properties on International Drive and would allow for a higher nightly rate. Guests would also like to see an on-site bar. Excellent location and facilities.

# THE ENCLAVE HOTEL & SUITES

## 2013 MARKETING PLAN

### SITUATION ANALYSIS

#### STRENGTHS & OPPORTUNITY ANALYSIS

### Service Offering/Differentiate

#### Strengths

- 24 hour call center
- Near International Drive
- 4 star resort
- Cross selling of additional properties
- Pay per View Movies & Video games
- Resort ambiance & environment
- Daily Housekeeping
- First Class owner program
- Luxury equipped kitchens
- Complimentary Breakfast
- Flood lit tennis court
- Food Court Offering
- Gold Star in Sustainable Tourism
- Fully trained reservation staff
- Near Universal & Disney
- Deluxe Studios & 2 Bedroom suites
- Kids Quarters
- Complimentary Shuttle service
- Food & beverage operations
- 2 oversized pools
- Indoor Pool & Kiddie pool
- Detailed Marketing Plan in place
- 3 Hot tubs
- Lake Front gazebo
- Sky Kids Club

#### Opportunities

- Meeting space
- Marketing relationships
- International travel growth
- Religious retreats
- Conventions
- Government meetings
- Green Lodging status
- Self catering facilities
- High end amenities
- Travel industry incentives
- Quality product
- Pizza Hut Express on-site
- Summer holiday travel
- Family reunions/gatherings
- Corporate retreats
- Cross selling opportunities
- Association meeting planner travel
- Sky Hotels & Resorts branding
- Think Green Program
- US focus – domestic

# MARKETING STRATEGY

## Marketing Objective

Enclave Suites...A Whole New Experience!

Our newest slogan at staySky Hotels & Resorts...A Whole New Experience! Is nothing more than allowing the guest to enjoy an experience!

Enclave Suites offers the experience of staying in the middle of everything on International Drive.

The Enclave Suites continues to offer guests the experience of providing one of the best values in the Orlando market, with our unique rooms, balconies and tropically landscaped grounds all combine to offer guests an opportunity to enjoy their stay in Orlando without breaking their budget.

The Enclave Suites continues to offer unique services not offered by our competitors. In 2012, the staySky Kids Club continued to be a huge success, as was the poolside BBQ's and Dive In Movie Night. Our objective is to continue to showcase the Enclave Suites experience by emphasizing the tremendous value and resort style amenities the Enclave Suites offers to both international and domestic guests!

The Enclave Suites...A Whole New Experience!

## Target Marketing

With the explosion of social media, such as Facebook and Twitter, we've been given the opportunity to market the Enclave Suites in a whole new direction to a new consumer. We continue to target international and domestic travelers but, in a variety of new ways.

We have a dedicated team working on social media daily to keep our guests engaged and informed of the happenings at Enclave Suites and Orlando. We continue to cement our current relationships and look for new opportunities. With our strong partnerships with Visit Orlando, Visit Florida and Expedia we will continue to target and capture the attention of in-bound visitors to Orlando.

According to a recent Gallup survey, consumer confidence appears to be rebounding, starting with high-income consumers spending about two percent more this year than last year. Overall, over a third of consumers reported that they feel they have more than enough money to purchase things they need and that their standard of living is improving. All this bodes well for the travel industry. With consumers becoming more comfortable and even more optimistic, discretionary spending increases are likely to benefit.

We will continue to be focused and exceptionally efficient with our marketing and sales efforts and ensure our marketing is targeted thus generating a greater return. Target marketing key characteristics for US domestic guests:

### Leisure Traveler

- Families with children, couples, baby boomers, grandparents vacationing with grandchildren.

- Small corporations, individual business traveler

- Household Income

- \$60,686 – \$110,000

- Top Activities

- Theme park/amusement
  - Shopping
  - Golf and sporting activities
  - Museums and arts



# THE ENCLAVE HOTEL & SUITES

## 2013 MARKETING PLAN

### MARKETING STRATEGY

---

- Average Length of Stay
  - 4.3 Nights

- Transportation
  - Auto
  - Air

Target marketing key characteristics for International guests:

- Western Europe, South America, Asia and Canada
- Leisure Traveler
  - Families with children, couples, baby boomers, grandparents vacationing with grandchildren.
- Household Income
  - \$64,310 – \$120,000
- Top Activities
  - Theme park/amusement
  - Shopping
  - Golf and sporting activities
- Average Length of Stay
  - 9.2 Nights
- Transportation
  - Air

# THE ENCLAVE HOTEL & SUITES

## 2013 MARKETING PLAN

### MARKETING STRATEGY

## Advertising Schedule

Alabama/Georgia/SouthCent Motorcoach Tradeshow Combined	Special & Advance
Alabama/Georgia/SouthCent Motorcoach Travel	Travel
Allied T-Pro Tarrif - ENC, LBVRV & PAL	Brochures & Lit.
American Bus Association Dues	Dues & Subscript
American Bus Association Tradeshow	Special & Advance
American Bus Association Travel Expense	Travel
Brazil Agency	Contract Services
Brazil Agency Marketing	Contract Services
Brazil Agency Trade Show	Special & Advance
Canadian TA & TO Sales Calls	Special & Advance
Canadian TA & TO Sales Calls	Travel
Channelrush- Enclave	Internet Services
Client Entertainment	VIP Expense
Client Gifts	VIP Expense
Contingency	Misc Sales
Dot Com Trainings/ Call Ctr	Special & Advance
Dot Com Trainings/ Call Ctr	Travel
Expedia Conference	Travel
Florida Huddle	Special & Advance
Florida Huddle	Travel
Florida Travel & Lifestyles Magazine	Magazine Adv
FTI NA Brochure	Brochures & Lit.
Georgia Motorcoach Dues	Dues & Subscript
Gold Medal Brochure	Brochures & Lit.
Golfpac Preferred Marketing Partner	Brochures & Lit.
Hotelbeds Workshop	Misc Sales
Hotelbeds Workshop	Travel
HSMAI	Dues & Subscript
HSMAI Memberships	Dues & Subscript
HSMAI Monthly Lunches	Travel - Meals/Ent
IQRez Booking Engine- Enclave	Internet Services
Ireland Sales Visits & Trainings	Special & Advance
Latin Publications	Magazine Adv
Miami Sales Calls - Fall	Special & Advance
Miami Sales Calls - Fall	Travel
Miami/Ft. Lauderdale Sales Calls - Spring	Special & Advance
Miami/Ft. Lauderdale Sales Calls - Spring	Travel
Military Tradeshow	Special & Advance
Military Tradeshow Travel Expense	Travel
New World Tariff/DER TOUR	Travel
New York TA & TO Sales Calls	Special & Advance
New York TA & TO Sales Calls	Travel
North Carolina Motorcoach Dues	Dues & Subscript
North Carolina/VA Motorcoach Tradeshow Combined	Special & Advance
North Carolina/VA Motorcoach Travel Expenses Combine	Travel
NTA - National Tour Association Dues	Dues & Subscript
NTA - National Tour Association Tradeshow	Special & Advance
NTA Travel Expenses	Travel
Online Contingency	Internet Adv
Photography - Equipment, Supplies & Image Hosting	Photography
Printing	Printing & Stationary
Promotional Items	Special & Advance
Prospecting - AA Vacations	Special & Advance
Prospecting - AA Vacations	Travel
Prospecting - Allegiant Air	Special & Advance
Prospecting - Allegiant Air	Travel
Prospecting - GoGo	Special & Advance
Prospecting - GoGo	Travel
Prospecting - JetBlue	Special & Advance
Prospecting - JetBlue	Travel
Prospecting - MLT	Special & Advance
Prospecting - MLT	Travel
Prospecting Sales Calls	VIP Expense

# THE ENCLAVE HOTEL & SUITES

## 2013 MARKETING PLAN

### MARKETING STRATEGY

RCMA - Religious Conference & Meetings Assoc.	Dues & Subscript
Rejuvenate Conference	Special & Advance
Rejuvenate Conference Travel Expenses	Travel
RoomSaver Advertising	Brochures & Lit.
SEO Works - Webhosting & SEO	Internet Services
SKAL	Dues & Subscript
Sky Travel Agent Reward Program	Internet Adv
Social Media Advertising	Internet Adv
South Central Motorcoach Dues	Dues & Subscript
Stella Brochure	Brochures & Lit.
SYTA - Student Youth Travel Association Tradeshow	Special & Advance
SYTA Travel Expenses	Travel
SYTA-Student Youth Travel Association Dues	Dues & Subscript
TEAMS Conference	Special & Advance
TEAMS Conference Travel Expense	Travel
Tennessee Motorcoach Association Dues	Dues & Subscript
Tennessee Motorcoach Tradeshow	Special & Advance
Tennessee Motorcoach Travel Expense	Travel
Texas Bandmasters Tradeshow	Special & Advance
Texas Bandmasters Travel	Travel
Thomas Cook CA Brochure	Travel
Thomas Cook Canada Pdt Launch	Special & Advance
Thomas Cook Canada Product Launch	Travel
Thomas Cook Charter Brochure - LBVRV & ENC	Brochures & Lit.
Tour Operator Res Incentives	Misc Sales
Transat CA brochure	Brochures & Lit.
Travel Impressions Brochure	Brochures & Lit.
Travel Ticker	Internet Adv
Travelocity Sponsored Search	Internet Adv
Tripadvisor Business Listings	Internet Adv
TSAE Dues	Dues & Subscript
TWIGS	Travel
TWIGS	Travel
UK Publications	Magazine Adv
UK Sales Visits & Training & Travel	Special & Advance
UK Sponsorship Events	Misc Sales
UK Sponsorship Events	Travel
US Airtours	Brochures & Lit.
US Travel Association	Dues & Subscript
US Travel Pow Wow	Special & Advance
US Travel Pow Wow	Travel
Virgin Holidays Brochure	Brochures & Lit.
Virginia Motorcoach Dues	Dues & Subscript
Visit Florida - UK Sales Mission	Special & Advance
Visit Florida - UK Sales Mission	Travel
Visit Florida - Cent American Sales Mission	Special & Advance
Visit Florida - Cent American Sales Mission	Travel
Visit Florida - Florida UK Night WTM	Misc Sales
Visit Florida - S American Sales Mission	Special & Advance
Visit Florida - S American Sales Mission	Travel
Visit Florida - Tour America Show	Special & Advance
Visit Florida - Tour America Show	Travel
Visit Florida - UK & Irish Advisory Lunch	Special & Advance
Visit Florida - UK & Irish Advisory Lunch	Travel
Visit Florida Membership Dues - SKY H&R	Dues & Subscript
Visit Orlando (Spring & Fall) DriveMkt DirectMktg	Other Advertising
Visit Orlando - ABAV & Sales Calls	Travel
Visit Orlando - Brazil Sales Mission	Travel
Visit Orlando - Canada Sales Mission - East Coast	Special & Advance
Visit Orlando - Canada Sales Mission - East Cst	Travel
Visit Orlando - Canada Sales Mission - West Coast	Special & Advance
Visit Orlando - Canada Sales Mission - West Cst	Travel
Visit Orlando - ITB Germany	Special & Advance
Visit Orlando - ITB Germany	Travel

# THE ENCLAVE HOTEL & SUITES

## 2013 MARKETING PLAN

### MARKETING STRATEGY

Visit Orlando (Spring & Fall)Collinson Inserts (2)	Newspaper Adv
Visit Orlando 2013 Official Int'l Visitors Guide - Enclave	Brochures & Lit.
Visit Orlando 2013 Tour & Travel Reference Manual	Brochures & Lit.
Visit Orlando AAA Going Places Magazine Spring & Fall Co-op	Magazine Adv
Visit Orlando Canadian Automobile Assoc. Fall	Magazine Adv
Visit Orlando Canadian Digital Co-op	Internet Adv
Visit Orlando Digital Response Program - 2 months comp	Internet Adv
Visit Orlando Enhanced Listing Enclave	Internet Adv
Visit Orlando Fall Canadian Newspaper (3) Inserts	Newspaper Adv
Visit Orlando Fulfillment Insert	Brochures & Lit.
Visit Orlando Hotel Membership Dues - Enclave	Dues & Subscript
Visit Orlando Leads Luncheons	VIP Expense
Visit Orlando Magic Card - Enclave	Other Advertising
Visit Orlando Text Box Links (1 per month)	Internet Adv
Visit Orlando-African American Guide	Magazine Adv
Website Hosting-Enclave	Internet Services
Website SEO- Enclave	Internet Adv
Zimmerman Public Relations Contract/Social Media	Contract Services
Zimmerman Social Media Contract	Contract Services
Zimmerman Social Media Marketing	Internet Adv

## Internet Marketing

We continue to see an increase of visitors to our website and most certainly in 2013 with the newly redesigned website. The most common way a buyer finds our website is through search engines. Internet users are twice more likely to find a site through a search engine than through any other means.

Our team of experts in the e-commerce field have researched and developed keyword phrases that consumers are most likely to use when searching for lodging in the Orlando market. The keyword phrases that our team has developed generate not only more traffic to the website but higher quality targeted traffic to ensure we accomplish the property's overall goal of "customers delivered to the booking engine".

Additionally, we regularly review and update the content on our web pages to insure that the content is unique and relevant. By completing content reviews on an ongoing basis this further enhances our website search engine appeal.

To maximize the exposure, it is important to compliment the search engine website optimization with pay-per-click advertising campaigns. Pay-per-click acts as a powerful compliment to regular optimization to ensure the site gets top position when consumers are looking for the property, allowing us to switch consumers from third party merchant bookings to direct reservations. This type of advertising allows us to compete directly with channels of distribution such as Expedia, Hotels.com, Orbitz, and Travelocity to name just a few.

Along with the traditional customized mailings used over many years, it is also important to continue to send out monthly E-Mail blasts that are targeted to specific audiences. Utilizing property information and photos is our personalized way of communicating with potential direct consumers, travel agents and tour operators. We are using our email marketing program this year which will allow us to schedule email blasts throughout the year to the appropriate audience.

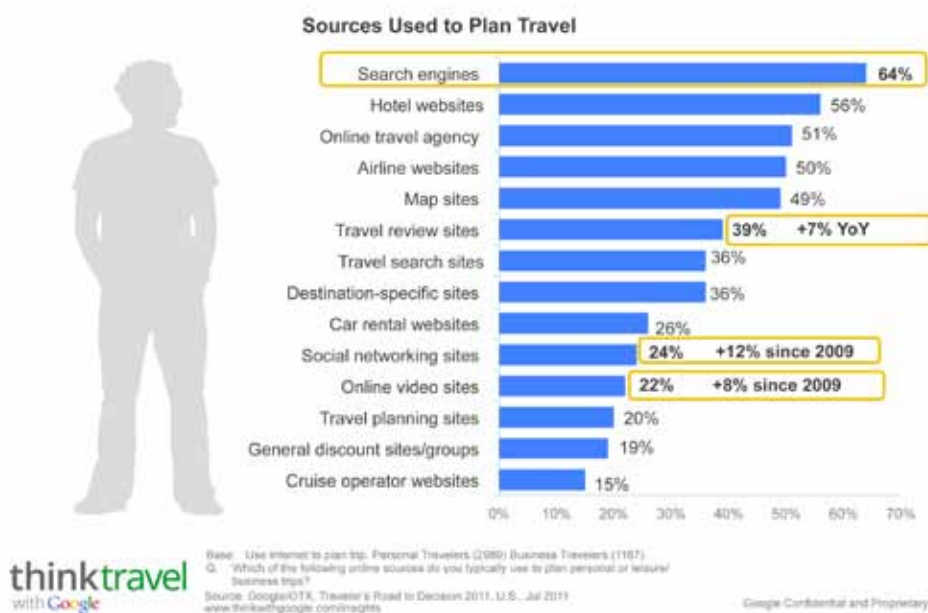
# THE ENCLAVE HOTEL & SUITES 2013 MARKETING PLAN

## MARKETING STRATEGY

### The Internet is the Leading Source for Travel Planning Information



### Search Remains the #1 Planning Source for Personal Travel



# THE ENCLAVE HOTEL & SUITES 2013 MARKETING PLAN

MARKETING STRATEGY

## Public Relations



the / **zimmerman** / agency

The Zimmerman Agency is a Tallahassee-based advertising, public relations and interactive firm with 150+ employees and billings of more than \$175 million. With international, national and regional accounts, The Zimmerman Agency is strategy-driven, results-oriented and creative in execution, with a stellar reputation among industry partners and the media as the largest independent hospitality pr firm in the United States.

As the public relations agency of record for staySky Hotels & Resorts, The Zimmerman Agency proudly spearheads all efforts in media relations and acquiring publicity for the brand. Our main objective is to increase revenues for the staySky Hotels & Resorts brand by heightening awareness and conscious consideration through dynamic public relations and social media efforts.

The Agency cultivates a relationship between the media and staySky brand as a primary function of our efforts, and uses these relationships to secure coverage in print, online and broadcast mediums. Our day-to-day media outreach includes pitching relevant storylines for the staySky brand, such as newsworthy updates and seasonal tie-ins, as well as vetting opportunistic requests from journalists.

Throughout our efforts, we only recommend moving forward with opportunities that represent at least a 10:1 ROI or return on investment, guaranteeing staySky receives publicity at little or no cost to the brand.



# THE ENCLAVE HOTEL & SUITES

## 2013 MARKETING PLAN

### MARKETING STRATEGY

Additionally, staySky's Zimmerman social media team works in conjunction with these pr initiatives to maximize executions, as well as engages audiences on Trip Advisor and Twitter.

In 2012, your Zimmerman team garnered 51+ million impressions in total exposure through creative campaigns, personalized media experiences and strategic promotional partnerships.

Please enjoy a sampling of brand publicity secured through the efforts of The Zimmerman Agency.



#### The Zimmerman Agency 2012 Public Relations Highlights

51.5 million total impressions  
\$485,000 advertising equivalency

12 secured media experiences with target publications and influential online resources, reaching 185,000 readers and more than 15.4 million unique visitors, totaling a media value of more than \$100,000

Aventura  
Tampa Bay Metro  
Family Beautiful  
Tallahassee Magazine

Jacksonville Magazine  
Florida Travel + Life  
Modern Day Moms  
Everyday Ramblings of My Life

Carrie with Children  
Macaroni Kid  
Mama B  
Examiner



# THE ENCLAVE HOTEL & SUITES

## 2013 MARKETING PLAN

### MARKETING STRATEGY

**6 creative campaigns** reached more than **1.6 million readers** and **23.4 million unique visitors**, garnering a media value of **\$134,500** at zero cost to staySky Hotels & Resorts

"Leap Day Magic in Orlando"  
"Stay Sky, Love Legos"  
"Florida Resident Rate"

"Fall into Savings"  
"Ghosts, Goblins and Gators"  
"Mistletoe & Magic"



3 cooperative promotions and 5 radio promotions reached a combined audience of **7 million readers, 967,000 listeners** and **1.4 million unique visitors**, totaling a media value of more than **\$254,000**

Atlanta  
Orlando  
West Palm Beach

Tampa  
Jacksonville  
Baltimore



**9 resort press kit pieces** and **6 activity press kit pieces**, encompassing Golf, Nightlife, Reflections Spa-Salon, Shopping, Theme Parks and Outdoor Attractions

# EXHIBITS

# THE ENCLAVE HOTEL & SUITES 2013 MARKETING PLAN

EXHIBITS

ADVERTISING DESIGN

## Visit Orlando International Visitors Guide - Landing Page



## Magicard® Landing Page



# THE ENCLAVE HOTEL & SUITES 2013 MARKETING PLAN

EXHIBITS

ADVERTISING DESIGN

## Dex One



**The Enclave**  
HOTEL & SUITES

6165 Carrier Drive, Orlando, FL 32819  
Phone: 407-351-1155  
Reservations: 800-457-0077  
EnclaveSuites.com  
f/EnclaveOrlando

- Located just off famous International Drive
- Deluxe Studio, Two-Bedroom/Two-Bath Suites, and Kid Quarter Suites, all with fully equipped kitchens
- Two outdoor pools, Jacuzzi, and kids' pools
- Indoor heated pool and Jacuzzi open 24 hours
- Pizza Hut Café Express, Convenience Court and Sundry Shop
- Tennis Court, Children's playground, and Game Room
- Complimentary Continental Breakfast
- Complimentary transportation to Universal Orlando®, SeaWorld® and Wet 'n Wild®

**Stay SKY**  
HOTELS & RESORTS

A Portfolio of Unique Hotels & Resorts

staysky.com

## Life with Lisa - Blogger

## Kool 105.5 FM

**Life with Lisa**

Families Count Down to Candy with Ghosts, Goblins and Gators at staySky Hotels & Resorts



If you are in Orlando and looking for an experience, look no further. staySky Hotels & Resorts is offering a **GHOSTS, GOBLINS AND GATORS** package at each of the brand's five Orlando properties. Frighteningly inexpensive rates start at \$265 per two night package now - Oct. 31, for all-suite accommodations to Rest In Peace, a trick-or-treat loot bag and four tickets to Gatorland, the alligator capital of the world, featuring thrilling reptile shows, an up-close-and-personal alligator petting zoo and exhilarating zip lining. All centrally located, staySky Hotels & Resorts give guests easy access to other popular attractions during the hallowed Halloween season, including Walt Disney World, SeaWorld and Universal Orlando.

**staySky Hotels & Resorts Ghosts, Goblins and Gators 2 night Package Rates**

Enclave Suites Rates from \$265

Enclave Suites, conveniently located off International Drive, provides every amenity a family desires including multiple bedroom suites, a convenience food court, two oversized outdoor pools as well as the only indoor pool on I-Drive, tennis courts and playground. As one of only two hotels on I-Drive to have rooms with outdoor balconies, Enclave Suites is also within walking distance to Wet 'n Wild and the popular interactive show, Pirates Dinner Adventure.

Offering a diverse portfolio of Orlando properties, staySky Hotels & Resorts feature multi-bedroom suites, all designed to meet the needs of families, groups, meetings and extended-stay visitors. Guests enjoy superior service, fantastic amenities and excellent locations for outstanding value.

To book the GHOSTS, GOBLINS AND GATORS package visit [www.staysky.com](http://www.staysky.com) and visit the packages page.

the **zimmerman** agency

**Kool 105.5**

**A Pirate Adventure**



105.5 wants you to experience A Pirate Adventure!

This week take a 1-hour tour to the secret lair of the day. Then when 4pm comes rollin' there you might just see a 2-night 1-day stay at Enclave Hotel & Suites in Orlando and dinner for 4 to Pirate's Dinner Adventure!

Enclave Suites, conveniently located off International Drive, provides every amenity a family desires including multiple bedroom suites, a convenience food court, two oversized outdoor pools as well as the only indoor pool on I-Drive, tennis courts and playground. As one of only two hotels on I-Drive to have rooms with full balconies, Enclave Suites is also within walking distance to Wet 'n Wild and the popular interactive show, Pirates Dinner Adventure.

To learn more about The Enclave Hotel & Suites visit [www.enclavesuites.com](http://www.enclavesuites.com)

**PIRATE'S DINNER ADVENTURE**

Pirate's Dinner Adventure is located just off of International Drive in Orlando, Florida. Guests set sail for swashbuckling fun, combined with the perfect blend of comedy, suspense, action and adventure. The show takes place in an indoor arena, where a full-size replica of an 18th Century Spanish Galleon is set afloat in a 600,000 gallon lagoon. Aboard the Galleon guests dine on a delicious pirate feast that's fit for a king! More than 150 actors/crew participate in this epic production each evening truly making Pirate's Dinner Adventure "The World's Most Intense Dinner Show!"

the **zimmerman** agency



# THE ENCLAVE HOTEL & SUITES 2013 MARKETING PLAN

EXHIBITS

ADVERTISING DESIGN

## Visit Orlando Official Visitors Guide

WE HAVE IT ALL IN ORLANDO!

Rates from \$59.00...visit [StaySky.com/Visit2013](http://StaySky.com/Visit2013) for all the details or call: 866-455-4062 and ask for the "Visit Orlando" Promo.

Sky Hotels & Resorts Collection

StaySky.com

A Whole New Experience



## Tennessee Motor Coach Association

GREAT DEALS OFFERED TO YOU BY SKY HOTELS & RESORTS!

THE BEST IN ORLANDO AND DAYTONA

staySky Hotels & Resorts offers six all suite resort properties in Orlando, which are our hotels are the Hawthorn Suites Lake Buena Vista, Hawthorn Suites Universal, Spa and The Palisades Resort all in Orlando, and the Hawaiian Inn on Daytona Beach. The Palisades Resort is a beachfront resort in Daytona Beach.

At staySky Hotels & Resorts, guests receive the comforts and conveniences of hotel amenities. With properties near Universal Studios/International Drive, Walt Disney World and many shopping and dining venues, we have a property to fit the needs of all. Properties offer complimentary motorcoach parking and complimentary or reduced rates for group bookings.

Please call 800-501-8494 x225 for more information and group rates.

StaySky.com

A Whole New Experience



# THE ENCLAVE HOTEL & SUITES 2013 MARKETING PLAN

EXHIBITS  
COLLATERAL

## Rack Card



**The Enclave Hotel & Suites**  
International Drive, Orlando

EnclaveSuites.com

A Whole New Experience

**The Enclave Hotel & Suites**  
Reservations: 800-457-0077  
Hotel Tel: 407-351-1155 • Hotel Fax: 407-354-5679  
8185 Carver Drive • Orlando, Florida 32819 USA

The Enclave Hotel & Suites is located just off International Drive and minutes away from Orlando's major attractions. Our two-bedroom, two-bath suites sleep up to six people, while our deluxe suites sleep up to four. The Enclave is perfect for you, your family – and a great Orlando family vacation!

- Deluxe studio and two-bedroom/two-bath suites, all with fully equipped kitchens and private balconies or terraces
- Two outdoor pools, two outdoor Jacuzzis, two outdoor children's pools
- One indoor, heated pool and Jacuzzi room, 24 hours, access center
- Pizzeria, Pizzeria Express, convenience food cafe, fitness center, spa
- Family game room, children's playground, game room and Sky Kids-Adventure Club (seasonal)
- Complimentary Club & Spa daily continental breakfast
- Complimentary transportation to Universal Studios/Orlando, SeaWorld, and Islands of Adventure (subject to availability)
- Complimentary wireless internet access

**Directions**

**From Orlando International Airport:** Exit 151 to I-4 East to exit 15A, right onto Sand Lake Road, left onto Carver Avenue. The Enclave Hotel & Suites will be straight ahead.

**From the West (Tampa, Ft. Lauderdale, Ft. Myers):** Exit 15A to I-4 East to exit 15A, right onto Sand Lake Road, left onto Carver Avenue. The Enclave Hotel & Suites will be on the right.

**From Downtown Orlando, Tampa, or Daytona:** Exit 15A to I-4 East to exit 15A, right onto Sand Lake Road, left onto Carver Avenue. The Enclave Hotel & Suites will be on the right.

**Map:** A map showing the location of The Enclave Hotel & Suites on International Drive, near the intersection of Sand Lake Road and Carver Avenue.

**SKY**  
A Portfolio of Unique Hotels & Resorts  
stay@sky.com

## Fact Sheet



**The Enclave Suites**  
8185 Carver Dr. Orlando, Florida 32819 | Tel: 407.351.1155 | Fax: 407.354.5679  
www.EnclaveSuites.com

**The Enclave Suites**  
located just off famous International Drive, The Enclave Suites hotel & suites offers exceptional amenities, providing a wide range of Orlando's most popular fun vacation resort hotels.

**Hotel highlights**

- Deluxe Studio, Two-Bedroom/Two-Bath Suites with Fully Equipped Kitchens and Private Balconies
- Two Outdoor Pools, Two Outdoor Jacuzzis, Two Outdoor Children's Pools
- One Indoor, Heated Pool and Jacuzzi Room, 24 Hours, Access Center
- Pizzeria, Pizzeria Express, Convenience Food Cafe, Fitness Center, Spa
- Family Game Room, Children's Playground, Game Room and Sky Kids-Adventure Club (Seasonal)
- Complimentary Club & Spa daily continental breakfast
- Complimentary transportation to Universal Studios/Orlando, SeaWorld, and Islands of Adventure (subject to availability)
- Complimentary wireless internet access

**Entertainment Options**

- Universal Studios/Orlando, SeaWorld, and Islands of Adventure (subject to availability)
- Complimentary transportation to Universal Studios/Orlando, SeaWorld, and Islands of Adventure (subject to availability)
- Complimentary wireless internet access

**Nearby Attractions**

- Universal Studios/Orlando, SeaWorld, and Islands of Adventure (subject to availability)
- Complimentary transportation to Universal Studios/Orlando, SeaWorld, and Islands of Adventure (subject to availability)
- Complimentary wireless internet access

**Map:** A map showing the location of The Enclave Suites on International Drive, near the intersection of Sand Lake Road and Carver Avenue.



**Guest Suite Features**

- Two-Bedroom Suite: 1,000 sq. ft., two bedrooms, two bathrooms, fully equipped kitchen, private balcony, two outdoor pools, two outdoor Jacuzzis, two outdoor children's pools, one indoor, heated pool and Jacuzzi room, 24 hours, access center, Pizzeria, Pizzeria Express, convenience food cafe, fitness center, spa, family game room, children's playground, game room and Sky Kids-Adventure Club (seasonal), complimentary Club & Spa daily continental breakfast, complimentary transportation to Universal Studios/Orlando, SeaWorld, and Islands of Adventure (subject to availability), complimentary wireless internet access.
- Deluxe Studio: 600 sq. ft., one bedroom, one bathroom, fully equipped kitchen, private balcony, two outdoor pools, two outdoor Jacuzzis, two outdoor children's pools, one indoor, heated pool and Jacuzzi room, 24 hours, access center, Pizzeria, Pizzeria Express, convenience food cafe, fitness center, spa, family game room, children's playground, game room and Sky Kids-Adventure Club (seasonal), complimentary Club & Spa daily continental breakfast, complimentary transportation to Universal Studios/Orlando, SeaWorld, and Islands of Adventure (subject to availability), complimentary wireless internet access.

**Contact Information**

**Reservations:** 800-457-0077  
**Hotel Tel:** 407-351-1155  
**Hotel Fax:** 407-354-5679  
**Email:** reservations@enclavesuites.com

**Address:** 8185 Carver Drive, Orlando, FL 32819

**Map:** A map showing the location of The Enclave Suites on International Drive, near the intersection of Sand Lake Road and Carver Avenue.

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stay@sky.com



# THE ENCLAVE HOTEL & SUITES 2013 MARKETING PLAN

EXHIBITS

COLLATERAL

## Parking Permit with Bounce Back & Pizza Hut Discount



## Property Map & Welcome Letter



# THE ENCLAVE HOTEL & SUITES 2013 MARKETING PLAN

EXHIBITS

COLLATERAL

## staySky Kids Club Brochure

*While the kids are away...*

### Concierge Services

The name "Concierge" started in medieval times as "keeper of the keys". They were entrusted with the keys to the castle to ensure that all visitors were taken care of with utmost care.

Please come down and meet Brian and Maribel, our "keeper of the keys" between 1pm-12pm daily. They can provide you with transportation, directions, suggestions and reservations for restaurants, spas, shows and even special events such as Birthdays or Anniversaries.

**KIDS CHECK IN!**

Come meet your Kids Club Coordinator, Barbara, at the Front Desk Lobby. ASK ABOUT OUR SCUBA AND TENNIS LESSONS.

*About the Kids' Club*

### TUESDAY

#### POOL SPORTS!

11pm-12pm Pool Sports Begin!

*\*Pool Rules:*  
\*No Running!  
\*No Diving!  
\*No Alcohol!

12pm-2pm Poolside Pizza for our SKiE athletes!  
Take a break and enjoy a slice of pizza as a personal pen pizza and soft drink! Fee: \$3.00 per pizza/\$8.00 personal pen pizza includes soft drink.

3pm Pool Race!  
Ready, Set, Go!

4:00 - 6:00pm  
**KIDS CHECK IN!**





Sky Kids Club Fall Olympics! A full day long event for the whole family filled with games, prizes and more!  
As some events have a fee, purchase your "Not A Hassle Band" for unlimited fun. See your Kids Club Coordinator for details.

For SKY  
ask about it. See you at the Sky Kids Club!

### WEDNESDAY

Family Sports Day (The winning family gets a Family Lunch!)

12:00 pm Tennis  
Come join the fun game of tennis with all your pals!

1:00 pm Ping Pong  
Come and test your skills on the ping pong table, winners take all!  
Location: Ping Pong Tables  
Fee: Complimentary

2:00 pm Tug of War

6:00 - 8:00pm  
**KIDS CHECK IN!**

### THURSDAY

Girls VS Boys  
11:00 am - 1:00 pm Flag Football

12:00 pm Soccer

12:30 pm Cricket/Baseball

1:00 pm Sports Arts & Crafts

2:00 pm - 3:00 pm Make your own Pizza Nut Pizza!

4:00 - 6:00pm  
**KIDS CHECK IN!**

### FRIDAY

Wii Sports  
2pm-3pm Wii Sports on the Big Screen  
Are you King of the Wii? Defend your title as we compete for King of the Ring!  
Location: Conference Room  
Fee: Complimentary

**FAMILY MOVIE NIGHT BEGINS AT DUSK/8pm!**  
Bring your swimsuits and come to Pool 1 for a family movie on the big screen!

4:00 - 6:00pm  
**KIDS CHECK IN!**

### SATURDAY

12:00 pm SUMMER BBQ & FACE PAINTING!  
Closing Ceremonies for Summer Olympics. Receive your Gold Medal!  
P.S. Don't worry, see menu for more information.  
LOCATION: POOL 1

4:00 - 6:00pm  
**KIDS CHECK IN!**



## Newsletter

WWW.ENCLAVEHOTEL.COM
THINGS GUARANTEED
2012

# SKY NEWS

OWNER NEWSLETTER



**In This Issue**

- News From The Resort
- Association News
- Unit Owner's Corner
- Sales & Marketing
- Reservations
- Names You Can Use
- Contacts

### News From The Resort

Dear Enclave Unit Owners,

At last fall is here bringing some cooler weather! So goodbye grilling temperatures hitting over 90 degrees with heat indexes reaching 100 degrees plus and hello to cooler mornings and more tolerable afternoons. We have been fortunate this hurricane season; Hurricane Isaac thankfully did not have a major impact on our area. Less than 30 days to go before hurricane season is over for another year.

This September we enjoyed a higher than normal occupancy, which we hope will carry through the rest of the year. In general, October gives us some higher occupancy due to all of the Halloween festivities. Guests come from all over to enjoy Mickey's Not So Scary Halloween Party at Disney's Magic Kingdom, Halloween Horror Nights at Universal Studios, and let's not forget the Halloween Spooktacular at SeaWorld.

After all of this scary fun, we get to take advantage of the slower periods in November and parts of December. During this time we get ready for the holidays, the annual budget meeting and next year's annual meeting in January. Those of you looking to start making travel arrangements, the annual meeting will be held on Saturday January 19th, 2013. Keep an eye out for information coming your way shortly.

Melissa Glenn  
General Manager

### Association News

Hi, Everyone:  
Florida tourism is headed for record tourism in 2012, ahead of last year's record. I hope the statistics play out so the Enclave can continue to welcome its share of visitors. As you are well aware, first impressions are lasting impressions. That's one reason the Enclave needs to show and function well for our guests, many of whom are repeat customers.

Thankfully, we dodged a bullet when Hurricane Isaac passed by. We do have insurance in place for hurricanes. The remaining commercial fire insurance companies left in Florida demand higher premiums as well as much higher deductibles before they pay an insured loss. The hurricane season officially ends until the first of December. We all hope that hurricanes are done for the year.

Your Board will be meeting on November 15, 2012 to approve next year's Association budget. All unit owners are invited to attend the meeting to observe the process.

Ed Maher



**Enclave Hotel & Suites**  
4566 Canfield Drive  
Orlando, FL 32819  
Phone: 407.261.1115  
Fax: 407.354.5679

staySky Hotels & Resorts  
7011 Grand National Drive Suite 104  
Orlando, Florida 32818  
www.staysky.com



**SKY**  
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