The Enclave
HOTEL & SUITES

MARKETING PLAN

2015

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2014 was a record setting year in terms of visitation to Orlando; officially recording an unprecedented 59 million visitors to the destination. This was the fourth year in a row that the area has set a record for visitors. The total number of visitors rose about 3.5 percent versus 2013 and it is estimated that about 90 percent of them were from the United States (Domestic Business).

The domestic tourism industry was aided by a slowly increasing economy, increased consumer confidence and willingness to travel. Many consumers had put off traveling for a number of years as their financial situations were precarious but increasing numbers had the confidence to travel in 2014. Still, the economic situation remains uncertain for many Americans and low growth in the business sector may hold back further growth in 2015.

However, there continue to be signs of fragility and struggle; in November, Florida cemented another position as No. 1 in the country but this time it was for foreclosure actions. It's been in the top spot for 13 of the last 14 months. In November, Metropolitan Orlando ranked fifth in the country for its foreclosure rate. Within Orange, Seminole, Osceola and Lake Counties, more than 2,300 foreclosure actions were filed in the courts last month. Near the Metro Orlando area, Brevard County ranked fourth nationally, and Polk County ranked ninth. As Orlando-area property owners approach the holiday season, more properties appear to be falling into foreclosure for the first time. In November, 545 first-time foreclosure notices were filed in the Central Florida courts — up from 433 a month earlier.

In early December Orlando-based SeaWorld Entertainment Inc. laid off 311 people throughout the company and while SeaWorld would not provide details as to what departments were affected, the layoffs were at corporate headquarters and throughout the company's 11 parks. The cuts were described as part of a plan to save $50 million annually BUT it is also believed that the negative publicity and ongoing support of 'Black Fish' (an aggressive documentary that depicts the life of Tilikum, a killer whale captured from the wild solely to perform at SeaWorld Parks), and subsequent boycott of the SeaWorld Parks is the reason for this.

BUT this is Orlando and Orlando has always been resilient. It is no accident that it has survived many global downturns in the tourism industry. After falling to 46.6 million in 2009 during the worst of the recession, visitor totals for Central Florida have rebounded steadily each year. To put 59 million visitors in perspective, that's more than the populations of Texas, New York and Pennsylvania combined.

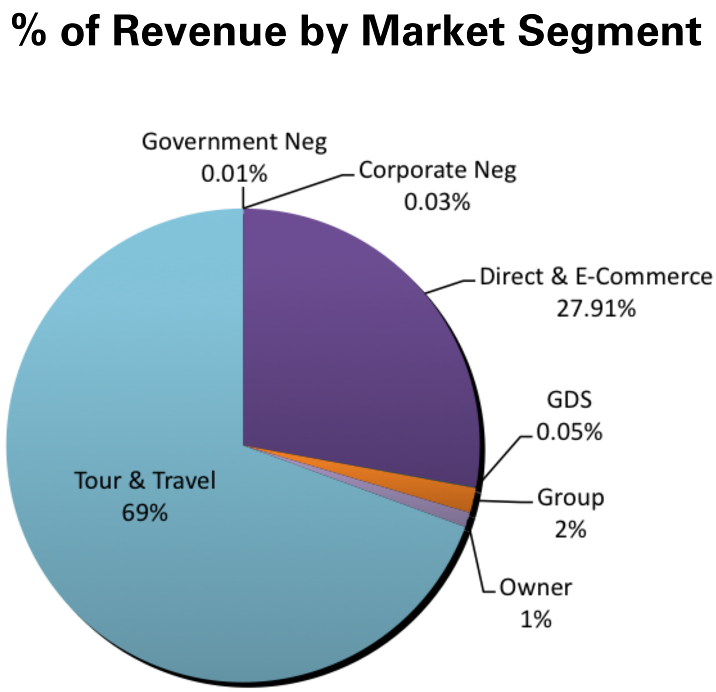
What's the reason for much of this growth? In Orlando the industry continues to innovate, expand and reinvent, with new attractions, new malls, new golf courses, hotels and new experiences.

Universal Orlando opened the first phase of its Cabana Bay Beach Resort in April and, this summer, completed its second phase of the Wizarding World of Harry Potter land - Diagon Alley. While a shadow currently hangs over SeaWorld and specifically the California park, since the release of the controversial movie, Black Fish; SeaWorld Orlando recently opened Antarctica: Empire of the Penguin. Walt Disney World finished a major overhaul of Fantasyland this spring and a 444 - room Four Seasons hotel, the area's first, opened in August.

In January 2014 local hotels recorded the highest occupancy rates — Average 73 percent — since 1998. In February, occupancy rose to 80 percent. As of October 2014, Orlando was reporting a Year to Date occupancy at a little more than 74 percent, up 3.4 percentage points versus the same period last year.

Through November 2014 the Enclave Suites reflected a 92.8% Year to Date Occupancy, almost 20% higher than Metro Orlando is reporting. The Enclave Suites is additionally reflecting an increase vs. prior year in Average Daily Rate through November 2014 of $2.96 to $57.08.

The business in 2014 at the Enclave Suites was made up of the below market segment percentages.



New Entertainment at I-Drive 360 Coming to Orlando in Spring 2015

The newest entertainment complex to be added to Orlando's roster of exciting attractions along International Drive has officially unveiled the details of what's to come in spring 2015.

The project, officially named I-Drive 360, will be headlined by The Orlando Eye Observations Wheel, Madame Tussauds Orlando Wax Museum and Sea Life Orlando Aquarium.

In addition; the world's tallest roller coaster, the Skyscraper™, will be built on the adjacent intersection of International Drive and Sand Lake Road in Orlando in the new SKYPLEX Entertainment Complex. At 570 feet, the Skyscraper™ would not only be the tallest structure in Central Florida, it would require special Federal Aviation Administration clearance before construction can proceed. It would also be roughly 150 feet taller than the Orlando Eye Observation Wheel, now under construction along I-Drive just south of Sand Lake Road.

The United States Tennis Association (USTA) unveiled plans at a press conference in Orlando earlier this year for the "New Home for American Tennis," a $60 million facility with 100 courts, making it the largest tennis center in the country.

The state-of-the-art facility in the Lake Nona area of Orlando will house the USTA's Community Tennis and Player Development divisions, and will be divided into dedicated areas that will focus on the complete tennis pathway – from the youngest players, to recreational players, to collegians, to future professional players, and to professional tour-level players. The target completion date is the fourth quarter of 2016.

"This new home for American Tennis will truly be a game-changer for our sport," said USTA Chairman of the Board and President Dave Haggerty. "This world-class facility will be an inclusive gathering place for American tennis and will allow us to impact our sport at every level, from the grassroots to the professional ranks."

"Today's announcement is wonderful news for families in Orlando," Scott said. "This state-of-the-art facility will be the USTA's first year-round outdoor facility."

The USTA is partnering with Lake Nona and Tavistock Group, along with a consortium of regional and state partners, to construct a facility in a hotbed for tennis and in the nation's top destination city.

Mobile Travel; Over the past several years, rapid growth in mobile device adoption has had a dramatic impact on daily life worldwide. Smartphone ownership is soaring and a growing share of travelers are now adding a tablet to the mix, making multi-device ownership increasingly commonplace.

Travel companies continue to innovate and adapt to a new breed of hyper-connected, always-on mobile travelers. While travelers' mobile expectations continue to rise worldwide, the specific ways in which consumers use mobile devices to search, shop, buy, experience and share travel vary by region and market.

Expedia reports a major shift to US mobile bookings which is translating to a big increase in last minute transactions. "The booking window is changing," said Dhiren Fonseca, co-president of Expedia's Partner Services Group. "We've seen a 28% growth in same day transactions.

"This speaks to the growth we've seen in our mobile business; 65 percent of mobile transactions are happening same day and travelers are taking shorter trips

In anticipation of the growth and impact of the E-Commerce segment on our business; after extensive research and consumer feedback, we have updated our websites with a new RESPONSIVE design. 'Responsive' design provides an optimal viewing experience for the user across all types of computer platforms & screens, whether desktop, mobile tablet or cell phone. The New enlarged images and increased size, placement and color of the "Book Now" button all drive higher conversion ratio's and enhance the overall user experience especially when viewing on a mobile platform.

So, all in all - 2015 looks to be an exciting year…..there is much activity and much to be done to ensure we capture our share of any increased visitation and adapt to any change in market segmentation that these new attractions may draw. There is an opportunity this year to drive rate during peak periods while engaging a greater audience. Our hotel must remain competitive and in top condition so that we provide the highest level of accommodations and service on a consistent basis. We must stay focused and be ready to react to any sudden shift and change in the global economy and or world events that may alter the way we see and do things today.

Your Team at the Enclave Suites is up for any challenge that 2015 may bring and we are ready for what will be a crucial year for the Enclave Suites.

SITUATION ANALYSIS

Domestic Visitation

Orlando hosted 54.4 million domestic visitors in 2013, an increase of 2.9% from 2012. The overwhelming majority (81%) traveled for leisure purposes (44.3 million), with the remaining 19% visiting for business purposes (10.1 million).

- Orlando's share of domestic leisure travel to Florida in 2013 was 26%.
- Total 2013 domestic leisure travel volume was up 3.4% from 2012.
- Leisure travel to Orlando by Florida residents increased 4.4% to 23.2 million visitors.
- Non-Florida resident leisure travel increased 2.3% to 21.0 million visitors.
- Domestic leisure overnight travel to Orlando increased 3.7% to 30.9 million in 2013.
- Average length of stay among domestic overnight leisure visitors was at 3.8 nights in 2013, mostly unchanged from the last two years. Leisure visitors from Florida stayed an average of 1.2 nights, while non-Florida leisure visitors averaged 4.5 nights.
- Overall, 76% of domestic leisure visitors drove and 23% flew to Orlando in 2013. The remaining 1% used some other type of transportation, such as train or bus. Florida residents were the main force behind the high drive proportion, with 98% driving to Orlando compared to 53% of non-Florida residents.
- In 2013, the average party size was 2.5 persons.
- Nearly a third (30%) of domestic leisure travel parties to Orlando included children (under 18), up from 24% in 2012.
- The average age of Orlando's domestic leisure adult visitors was 44.7 years.
- The average household income was reported at $89,342.
- Vacation (57%) remained the main reason for visits to Orlando, with general vacation (35%) leading the category.
- Visiting a theme park/water park maintained its most popular activity status among domestic leisure visitors in 2013 (60%).
- Other popular activities included shopping (35%), dining (28%), and visiting friends & relatives (22%).
- The majority (65%) of domestic leisure visitors stayed in hotels/motels

International Visitation

International guests staying at our hotel have always been a key market segment for us with almost 70% of our total business in 2014 and 99% of the entire wholesale business. There are many characteristics of this market segment that are extremely important to us and help us understand what the contributing factors are for these visitors.

The below information includes trip planning behaviors, purpose of trip, activities, length of stay, expenditures, accommodations and more.

- Total international visitation to Orlando in 2013 was 4,856,000, a 14% increase from 2012.
- Total overseas visitor volume (excluding Canada and Mexico) to Orlando was 3,716,000 in 2013. Orlando's market share of overseas visitors to the U.S. grew from 10.7% in 2012 to 11.6% in 2013.
- First-time travelers to the U.S. accounted for nearly one-fourth (23%) of Orlando's 2013 overseas visitors; mostly unchanged from the prior year (24%).
- Other U.S. destinations most commonly visited by Orlando's 2013 overseas visitors included Miami (40%), New York (14%), Tampa/St. Petersburg (7%), and the Florida Keys (5%).
- On average, overseas travelers made their trip decision 4.6 months prior to their visit and booked their airline reservations 3.5 months in advance (both metric mostly unchanged from 2012).
- Airlines (50%) were the top information source used for planning an Orlando trip, followed by personal recommendations (34%) and online travel agency (34%).
- Proportion of Orlando's overseas visitors traveling as part of a package continued its downward trend, falling to 19% in 2013. UK travelers reported the highest percentage of package use among all featured countries. By segment, first-time U.S. travelers, those traveling with kids, and those visiting Orlando only seemed to be more likely to purchase a travel package.
- Vacation/holiday (85%) remained the main purpose for visiting Orlando for the large majority of the overseas visitors. Top Orlando activities included shopping (91%), visiting amusement/theme parks (84%), and sightseeing (75%).
- Overseas visitors spent an average of 15.3 nights total in the U.S., down from 16.1 nights in 2012. The average length of stay in Orlando was 8.6 nights, a slight decrease from 8.8 nights in 2012.
- Overseas visitors spent approximately $1,038 per person per trip in Orlando, up somewhat from $963 per person in 2012. Total overseas visitor spending in Orlando during 2013 is estimated at $3.9 billion.
- The majority of travel parties to Orlando were comprised of adults only (66%).

International Visitation

Overall, the average party size was 2.4. The average household income was $90,887.
The following report features detailed information about visitors to Orlando from the United Kingdom, Germany, Brazil and Colombia.

United Kingdom
Orlando received an estimated 759,000 visitors from the United Kingdom in 2013, a 4% increase from 2012. Visitors from the UK accounted for 20% of Orlando's total overseas visitor volume.

Visitors from the UK reported the longest length of stay in Orlando at 12 nights; they were also more likely to spend most of their U.S. trip entirely in Orlando.

Use of packages were the highest among the UK visitors (31%) compared to all other featured countries and significantly higher than the average overseas traveler.

Those visiting from the UK were more likely to make their trip decisions and book their airfare well ahead of their trip, 6.8 and 6.0 months in advance, respectively.

More visitors from the United Kingdom traveled with children (41%) than did overseas visitors overall (34%).

Germany
Germans spent more total nights in the United States (18.0 nights) than any other featured country. However, the number of nights dedicated to Orlando remained low at just under 5 nights. Other popular U.S. destinations visited by Germans included
Miami (49%), the Florida Keys (31%), Ft. Myers (23%) and Tampa/St. Petersburg
(19%)

Visitors from Germany were more affluent, with an average reported household income of $112,733. However, their spending in Orlando was the lowest due to their shorter stay.

German travelers were much more likely to travel to Orlando without children (85%) than the average overseas visitor (66%). These visitors also reported a higher percentage of business/convention trips than the average (15% vs. 6%, respectively).

Brazil
As Brazilian consumers are still discovering Orlando as a destination, this market continues

International Visitation

to generate a relatively high percentage of first-time U.S. travelers (29%)
When planning an Orlando trip, Brazilian visitors tend to rely heavily, more so than the average overseas visitor, on personal recommendations (56%), followed by the information provided by an airline (53%)

Brazilians reported a second highest (after UK) level of package travel (23%).
When compared to other countries, Brazilians indicated the greatest interest in amusement/theme parks (91%) as a leisure activity while in Orlando.

Visitors from Brazil also reported the highest level of spending in Orlando at $1,680 per person per trip.

Colombia
Colombians made their travel plans relatively close to the time of their trip - 2.5 month in advance vs. 4.5 months for an average overseas visitor. The airline booking window was even shorter at 1.6 months.

Airline (44%), online travel agency (35%) and personal recommendations (30%) were the top sources of information for planning an overseas trip among Colombian travelers.
While vacation was still the predominant reason for an Orlando trip among visitors from Colombia (81%), these travelers reported a higher than average proportion of visiting friends/relatives (12%).

Colombian visitors spent half of their U.S. trip in Orlando (6.2 our 12.1 nights). The average per person per trip expenditures in Orlando totaled $890.

International Visitation

Outbound UK — November 2014

UK Economic Environment is slowing down:

Consumer confidence rose for the 11th consecutive month in November. Retail sales volumes grew in October by 4.3% making it the 19th consecutive month that year-on-year sales have increased. Despite these positive signs, the UK economy is forecast to grow at a slower rate during the next two years. The poor status of the Euro Zone economy is holding the UK economy back from growing at a more robust rate.

Outbound Travel Trends have been declining for the past few months:

UK residents made 1.5% more outbound visits through September 2014, however total outbound trips fell in September (-1.5%) for the fourth consecutive month. Visits to North America grew by 8% through September 2014 and holiday visits to the U.S. grew by an estimated 9.3% through YTD September.

UK Travel to Orlando remains flat:

Direct arrivals from the UK to Orlando/Sanford grew by less than 1% through October 2014. However, direct arrivals are projected to increase by 0.6% in 2014 to reach 694,000 and 3.2% in 2015. Overall, the outlook for 2015 has become more positive in the past month. An increase in seat capacity by BA, Virgin and Thomas Cook as well as new service from Gatwick by Norwegian Air Shuttle, will more than offset the loss of service by Monarch Airlines. In addition, total seat capacity in 2015 is projected to increase by 2.3% in 2015 to 845,000 seats from 826,000 in 2014.

Appreciation of the pound makes U.S. Room Rates more affordable:

A 7.1% appreciation in the pound resulted in UK travelers paying 2.5% less to stay in a U.S. hotel through YTD October 2014. Travelers from countries that use the euro paid 1.3% more for a U.S. hotel room during the first ten months of the year. A 1.9% appreciation in the euro was offset by a 4.4% increase in U.S. room rates.

UK travelers paid 0.6% less for a hotel room in Orlando through October 2014 as the pound appreciated in value against the U.S. dollar by 7.1% while Orlando room rates increased by 5.9% in U.S. dollars.

Source: David Redekop - Redmarke Research

International Visitation

Outbound Canada — November 2014

Consumer confidence is down from a year ago:

Consumer confidence fell by 4.4 points in November from a year ago. Confidence is strongest in the Prairie Provinces and in BC, however the weakest in Quebec. Only in BC did consumers appear to be significantly more confident about their economic prospects than they were last year at this time. Canadians are less confident about the outlook for their financial well-being than they were at this time a year ago.

Total Canadian Outbound Travel Outbound leisure trips grew by just 1.7% through September:

However, leisure trips to the U.S. fell by 1.6%, but grew 8.9% to non-US destinations. Although leisure trips fell, trips to the US by commercial plane grew 2.3% through September.

Canadian Travel to Florida and Orlando:

Florida attracted a record breaking estimated 2.99 million visits from Canada last winter. Direct air arrivals from Canada to major Florida destinations grew by 5.2% through September 2014. Florida is the top outbound (U.S. & non-U.S.) winter vacation destinations for Canadians intending to travel to the U.S. About the same percentage of Canadians indicated in the October 2014 survey that they planned to visit Florida this winter on their longest winter vacation trip. Ontario residents made 1.4% more outbound trips through YTD September 2014 while residents of Quebec made only 1.0% more outbound trips.

US room rates up 11.7%:

The Canadian dollar averaged US $0.91 through October while it was worth US $0.98 through October 2013. The Canadian dollar is also expected to fall 3.3% during winter 2014/2015, but total trips (air and auto) are forecasted to grow by 0.3%. Overall Canadians paid 11.7% more to stay in a hotel when visiting the United States though September 2014.

Source: David Redekop - Redmarke Research

Meeting, Convention & Business Travel

According to the American Express Meetings & Events 2015 Forecast, the positive sentiment for 2014 will continue into 2015 and with an expected 3.3 percent increase in meeting activities for 2015. Meeting spending is forecasted for a very slight increase of .3 percent and the average length of a meeting being 2.3 days. However, overall there is still a continued push to stay close to home and host meetings in the places where most attendees live. Incentive trips are reported to be the longest meetings, while training meetings lead the pack in amount of meetings, and number of attendees. This forecast has also revealed that Orlando has slipped from #1 to #2 as the top destination choice among meeting planners, losing to Chicago for 2015.

MARKET BY SEGMENT

E-Commerce

A hotel's E-Commerce presence is made up of two basic components: the hotel's brand site (enclavesuites.com), and their presence and placement within the online travel agencies (OTA's) such as Expedia, Booking.com, Orbitz, etc.

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 E-Commerce Direct (via hotels own website) where there are no commissions and a much greater opportunity for hotels to achieve higher rates with NO margins/commissions.

Travelers seek value and comparison shop with increasing frequency. Most consider the web to be important for travel research and planning, but the web is also a fundamental source of inspiration for new travel. Search remains key for leisure and business travelers as they seek a variety of content and information online. Among online sources, travelers mostly rely on brand sites and search. Leisure travelers also rely on online travel agencies (OTA's) for inspiration as well as for destination planning.

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 a guest visits to make travel plans is via 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).

In 2014 20.16% of the Enclave's overall revenues came through E-Commerce channels. Of that 17.92% was via E-commerce Wholesale (3rd party OTA's) and 6.54% via our own website enclavesuites.com - E-Commerce Direct

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 continued goal in 2015 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 updated responsive designed website, SEO and through the study of performance measurements such as Google Analytics will all contribute to achieving this goal.

SMERF Market & Groups

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

The group sales team is looking forward to 2015 being a good year for the groups market. We are actively searching for new business in all markets and will try some different approaches to increase our group bookings.

We attend the National Tour Association annual convention in January each year. We have pre-scheduled appointments and daily networking events to meet with Tour Operators that plan group travel for any type of group. In 2013 they joined forces with the United Motorcoach Association. Beginning in 2015, we will have open access to the UMA show floor and the members that also plan Motorcoach tours. They are also partners with the Faith Travel Association and we will have opportunities to meet faith based travel planners one day during the conference to distribute our hotel information to them. NTA also has international members that attend their marketplace. We will have the opportunity to meet with tour planners from other countries and will focus on the Chinese market that is a growing market for the Orlando area.

The American Bus Association also has an annual convention where we have pre-scheduled appointments and networking events. The companies we meet with own their own buses and plan Motorcoach tours of all types to many locations. In addition to the ABA annual convention, we also attend three smaller state shows for the southeastern states. We have noticed an increase in Motorcoach business since we started attending these shows. In the past couple of years, six states have combined their annual marketplace meetings into two different shows, offering us more opportunity at two shows instead of having travel expenses for six states, which gives us a much better return on our investment in these associations.

The Student & Youth Travel Association proves to be a great show for us. With our hotels being in central Florida, we have a lot of student performance groups, senior class trips and educational groups needing hotel accommodations in our area. They tend to be larger groups that stay for three or four nights. In addition to the SYTA annual convention, we also have attended Texas Band, Choral and Orchestra to gain more performance group business.

Our most lucrative market in leisure group travel has been the sports market. Sports business has increased for us each year for the past three years. There are different sports travel shows where we meet with sports travel planners and large sporting event planners. We have attended the TEAMS conference the past two years and will attend Connect Sports Marketplace in 2015 to try to meet additional planners coming to our area. Our suites are of great interest to this market, as most sports travel consists of families and teams traveling together.

Corporate / GOV / Conventions

The Sales Team will continue to focus attention on meeting, convention, and corporate business in 2015. Although these market segments do not account for a large percentage of our overall business, it is still an important source of revenue for us. Business travel is typically higher rated, and primarily weekday travel, so they compliment our leisure and group travel markets very well.

The Orange County Convention Center is the second largest convention center in the US, so tradeshow business is huge here in Orlando. The convention hotels (having at least 300 rooms, and 20,000 square feet of meeting space) book most of the convention business, but we do book overflow rooms for participants attending these conventions. We will continue to work closely with Visit Orlando on any over-flow that they may have.

In addition to convention business, Orlando is ranked #7 for business meetings, and many attendees who come to Orlando on business combine their corporate trip with a leisure stay. These visitors are referred to as "leisure travelers," and according to the annual American Travel Behavior Study conducted by Hotwire, 49% of business travelers tack leisure time onto their work trips. This is very advantageous for us as our suites are well-equipped for longer stays and are ideal for both corporate and leisure travel. We plan to utilize this in our marketing pieces through email blasts and campaigns in 2015 in order to show that our property is ideal for this type of combination trip. We will also continue to partner with online group travel partners including CVent, and Hotel Planner for any corporate groups that they are trying to place.

Although travel planners are still rate conscious going into 2015 when booking business travel, as the economy continues to rebound, Visit Orlando has forecasted that we can expect to see a shift in this trend. Meeting planners are becoming more interested in convenience, entertainment, cleanliness, and safety more than the actual cost of their meetings. This is a great advantage for us, as an all-suite property could be perceived as excessive for a single business traveler and therefore harder to justify to a decision maker. We do not expect this shift to happen overnight, so for those meeting planners that are still cost conscious; our property also provides an affordable option when working with smaller budgets as we do not charge attrition, high service charges or additional fees for amenities like most of the convention properties do. We will continue to work closely with Visit Orlando and to bid on any meetings that come through their e-leads system, and emphasize the savings when booking our property.

Travel Agents / GDS

Are Travel Agents still relevant? Of course they are and selling strong.

There are more than 50,000 full time travel agents in the U.S., even after the rise of online self-bookings. Travel agents have embraced the changes in the industry and serve consumers through internet-based tools. Home based travel agents have made a resurgence in past couple of years. They understand that while the internet is helpful, the human touch and experience is equally valuable.

staySky Hotels & Resorts has increased our communication through bi-monthly email blasts, monthly newsletters and the retooled Travel Agent Rewards Program. Our monthly newsletters now include upcoming specials, fun facts, and an event calendar with the goal of piquing the interest of those on the receiving end. Each new agent that signs up for our program receives an immediate response from our sales team. It's never too early to begin building that personal relationship with the travel agents.

We continue to look at areas which can impact the revenue of the Enclave Suites. Travel agents play a vital role in business travel, which is one of the Enclave Suites biggest markets. Our continued efforts with the travel professionals throughout the United States and Canada have provided us with various opportunities by participating in the Visit Orlando and Visit Florida trade shows each fall. Our relationship with these two organizations remain strong and continues to assist in our growth within the marketplace.

This year we added a dedicated sales associate focusing on travel agents. The associate has made great progress in creating personal relationships with various travel professionals, to increase our share of the market. Our goal is to find those agents that focus on Central Florida as their market.

Travel agent participation steadily increases throughout the market. Clients who are unsure of their purchases on the internet turn to an agent for assistance. Therefore, our efforts to continually educate travel agents on the value of the Enclave Suites remain our top priority.

Social Media

A hotel's online presence impacts travel planning for the consumer in a multitude of ways. Reports have found that 83% of travelers, aged 18-67, use social media when travel planning in the United States. Utilizing social media channels, such as Facebook and Twitter, has impacted the way consumers view the reputation of a business and gives them the opportunity to directly connect with the team behind the brand. This direct connection with previous, current and potential guests allows us to display our commitment to excellent guest service and satisfaction, while simultaneously building relationships with those who have traveled, and who are looking to travel, with us. Our primary focus has been Facebook, Twitter, and Trip Advisor, but for 2015 we are jumping ahead of the curve and extending our brand into other social sites. Sites that we believe others in the industry have yet to see the potential and will soon emerge.

With the constant connection consumers have to the internet, it is vital for all businesses to be easily reached by guests. This is why social media plays a major role in the entire travel process. From the first thought of taking a trip to reminiscing about wonderful vacation memories, travelers want to share their thoughts and hear from others who have had the same experience. Social media is used as part of the traveling process by guests for research on where they want to go, for communication while they are traveling, and then to provide feedback on their experience after they have returned. More than 80% of consumers said that they trust recommendations & suggestions of their social media friends and followers more than any other platform of advertising.

As of September 2014, Facebook had 1.35 billion monthly active users and of those users 864 million were daily users. Our goal for 2014 was to engage with fans and followers by posting content twice a week on our Facebook page. In the last few months of 2014, we recognized the value and influence we would have on engaging consumers by increasing our weekly posts to five times a week. Since implementing this new schedule, we have seen a significant response to increased posting and will continue this improved tactic into 2015. We will also participate in Facebook promotions throughout the year to engage our guests and increase interest in our brand. We also plan to continue demonstrating our commitment to excellent guest service by communicating and interacting with guests on a consistent basis.

Twitter is one of the most popular social sites amongst consumers, with 284 million monthly active users and 500 million Tweets sent per day. Twitter's mission is "To give

Social Media

everyone the power to create and share ideas and information instantly, without barriers." With Twitter's high usage rate and instant outlet for people to share their thoughts and ideas, it is important for us to maintain a strong presence and to interact with our followers on a consistent basis. We have increased our weekly posts from two days a week to five days a week, and will continue this trend in 2015. We also keep an eye out for hashtags and mentions of our properties, and engage with guests prior to, during, and after their stay.

Google+ is continuing its focus to gain popularity beyond its 540 million active users. We are utilizing Google+ for each hotel and creating content to be posted on a daily basis. For 2015, the focus of Google+ will transition from a social perspective to a search engine results tactic. Google is in the process of introducing new formats for search engine results, i.e. the Google Carousel, which will alter our use of Google+. Posting on Google+ will be on a daily basis throughout 2015, but the content will be optimized in efforts of landing a prime space on the Google Carousel.

We are also exploring Instagram and Pinterest and their role in the digital industry. With a combined total of 270 million users, Instagram and Pinterest are great outlets for our brands to pursue. With Instagram, we are able to display candid and behind the scenes photos in the life of a staySky Hotel and Resort. Instagram will allow our followers to receive insight into the people behind the brand, which is a great feature to highlight in the hospitality industry. Pinterest is another social site where we can display our hotels, resorts and amenities through the use of professional images, while also incorporating other topics that do not necessarily pertain to the hospitality industry, such as, fashion, recipes, holidays, party planning, and much more. Our strategy is to use Pinterest for topics beyond the hotel industry, so we can attract consumers and redirect them to our websites. This tactic promotes our brand and increases website traffic, with our goal being to stay in guests' minds when booking their next Florida vacation.

With the introduction of our Social Editorial Calendar, we now have a way to plan ahead and have social content ready the month prior to it being posted. Our main focus for content has been promoting our amenities and specials, as well as travel tips, infographics, and events going on in Florida. In coordination with the Editorial Calendar, we have also implemented the use of Hootsuite, the world's most widely used social relationship platform. Hootsuite has made engagement with our followers easier because we are now able to monitor multiple streams of information. Hootsuite has added great value to our digital initiatives and has

Social Media

received notable press by Forbes, stating "Here is a company that has made managing multiple social media properties easy and convenient. This is a key tool for business and individuals that want a simple way to manage all their posts and social media accounts." Through Hootsuite, we can schedule posts and track conversations related to our industry, and chime in on conversations in order to drive brand awareness.

Review websites have been a central part of our 2014 social media plans, and will continue to be an important factor throughout 2015. TripAdvisor is the world's largest travel site, reaching 315 million visitors each month. With an influx of visitors and publicly displayed reviews, it is important for each property to positively represent themselves on each forum. With all eyes on our brand, we make the effort to respond to every review and take this opportunity to demonstrate our commitment to excellent customer service and satisfaction.

A new tool aiding in our commitment to reach every guest is Revinate, the industry-leading guest feedback and reputation management solution. Through Revinate, we are now able to view all of our hotel and resort data on a one-page platform. This useful system allows us to look at a compilation of all hotel reviews, as well as how each service is ranking according to our guests. This instant feedback tells us what areas we need to focus on in order to continue providing top-quality vacations to our guests.

Along with the many digital outlets we provide to each hotel, we have now begun implementing a weekly blog that details our accommodations, tips, and events throughout Florida. By promoting new posts on our social channels, we have found another way to direct people to our website and drive brand awareness. In 2015, we will continue posting blogs on a regular basis to encourage and inform guests of current and upcoming local events.

International Wholesale

The Enclave Hotel and Suites is a firm favorite with the International Market gaining most of its occupancy from this market segment. Our three most productive countries remain the UK, Brazil and Canada whilst we are seeing a small increase in business from Argentina and Colombia. The hotel maintained its overall market share of business from this market segment from the operators that we work closely with.

Overseas visitors to Orlando made their trip decisions an average of 4.6 months in advance. Among featured countries, Brazilian and Colombian visitors made their trip decisions in the shortest time frame, on average 2.5 months in advance. Visitors from the UK made their trip decision earliest, on average 6.8 months in advance. The International traveler remains price sensitive and utilizes the internet to check for best prices and reviews before making their decisions.

Overseas visitors averaged 15.3 nights in the U.S. in 2014. The average number of nights spent in Orlando decreased slightly from 2013 to an average of 8.6 nights. While total time in the U.S. has been on a slight downward trend for the past two years, the proportion of the trip dedicated to Orlando has been gradually rising, peaking at 56% in 2013. Visitors from the UK spent the most nights in Orlando (12.0 nights).

The Brazilian Market is going through political and economic change showing a decrease in the projection for next year, but we are positive we can keep the growth in sales coming for this market with our strong relationships with the key tour operators. Our constant presence in this market allows us to project a positive 2015. We are developing new marketing plans for Colombia and Mexico; they are two important emerging markets. With new flights coming from these countries we will be looking for any business opportunity that these two markets can bring to the property.

We continuously search for new business opportunities that the Latin American market can offer to us. We have a good product and highly recognized brand in this market and we are confident that our projection for next year will continue in a positive direction.

British Airways added new service to Orlando in the later part of 2014 and in early 2015, increasing its service by three flights per week.

The airline will now operate between Gatwick Airport in London and Orlando International

International Wholesale

Airport 10 flights per week (compared to seven weekly flights) during specific demand periods of 2015, resulting in more than 7,100 extra seats.

Virgin Atlantic will be offering customers based in Northern Ireland four peak jumbo jet services into Orlando next summer which will add an additional 3,600 seats and will be the only scheduled airline to fly this route.

Azul Airlines from Brazil will have a weekly direct flight arriving from Sao Paulo into Orlando International Airport with 246 flight seats. They are a new client for us and the hotel will be included in their packaged holidays programs.

We continue to work closely with our key room night producing partners using the strong relationships that we have formed with them to generate business from key international markets. We also work closely with Visit Orlando, the Orlando Visitors and Convention Bureau and Visit Florida. We participate in numerous marketing and special initiatives, to promote the hotel and participate in major International and National Tradeshows such as Florida Huddle, World Travel Market (UK), International Pow Wow, ITB (Germany), ABAV (Brazil), Anato (Colombia) and FIT (Argentina). Each one of these trade shows help to develop new accounts, secure repeat business and increase revenue at the hotel. The sales team continues to conduct sales calls and visit the main call centers of our partners in the UK, Canada and Latin America where we hold in house training with their reservation agents to familiarize them with our hotel and gain product knowledge so that our hotel remains front and center of their mind and always in the consumer selection set.

With the opening last summer of Universal Orlando's 1,800 rooms Cabana Bay Resort, we will be challenged to maintain our strong International market share at the hotel. However, we are working closely with our partners reinforcing our commitment to them, this market, and our hotel.

Wholesale Group Market

The International Wholesale Group Market is a very competitive segment with Disney and Universal Hotels offering very attractive rates and added values such as park passes, early park entry, dine around program, food & beverages options, etc. Groups like all segments are extremely price sensitive and are typically looking for standard rooms with 2 double beds rather than suite properties such as ours.

However, the Enclave Suites saw slight growth from the International Wholesale Group Market in 2014 and we anticipate a small increases in 2015. We see mainly groups from Latin American that have a short booking window, on average only booking 2.5 months prior to arrival and we are seeing more repeat groups which is always a good sign.

We will continue to grow this market by working closely with our key product partners assisting them with training sessions for the group reservations department to help gain product knowledge so they are aware of hotels amenities, great location and proximity to the theme parks, shopping malls and new entertainment complexes.

Direct CRO

staySky Hotels & Resorts central reservations office is an exciting and vital, sales and guest service driven call center, manned by an experienced team. The reservation center acts as the central point for all incoming business generating sales with a goal of maximizing revenue growth.

Even in this day and age of internet savvy travelers, we continue to see demand for direct communication with the guests. We have created many additional opportunities to reach out to our guests prior to their arrival. One of these is through our "upgrade" program allowing our reservation agents to reach out to arriving guests and offer an upgrade based upon hotel availability. We have been quite successful capturing additional revenue through this upgrade program. Additionally, the special requests have been quite popular, from fruit baskets to birthday balloons our guests love the opportunity to make their stay memorable by adding to their reservations.

Pre-arrival calls will be a large focus in 2015, implementing a more consistent program where the Guest Service Agents are calling our guests pre-arrival to offer those last minute upgrades, resort transportation, spa certificates, park tickets and any extra in-house promotions to add to our customer service focus. A post-stay call will also be more present, to allow the guests to give us feedback and for them to be further encouraged to post reviews for us on Trip Advisor and Facebook, to help our overall ratings.

A new department within the reservations department was created this year; the Account Specialist Department. The specialist agents have tremendous experience within the hotel industry and are able to focus entirely on our Owner reservations, VIP Tour Operators and E-commerce. This allows better service to be provided in areas where additional knowledge and skill is required and has also opened up extra hours for our Owners, knowing that they can speak to one of the specialist agents, 7 days a week from 9:00am-8:30pm (Mon-Fri) and 10:00am-6:30pm (Weekends).

Training will be an ongoing focus within the reservation center in 2015 which results in better guest service. This year we have partnered with a Quality Assurance company to access the inbound calls by providing further coaching and training to our agents to further improve our commitment to exceptional service and sales in 2015 and beyond.

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 the 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 rates and grow REVPAR (Revenue per Available Room), a key indicator of a hotels performance. Our revenue management team includes an e-commerce team whose daily 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 bi-weekly to discuss pace pickup and demand and work together towards maximizing the revenue performance of the 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.

STAR Report

The STAR (Smith Travel Accommodations Report) program is used by the global hotel industry as a vital revenue management tool. The report benchmarks a hotel's performance against it's competitive aggregate and local market.

October 2014									
	Occupancy (%)			ADR			RevPAR		
	My Prop	Comp Set	Index (MPI)	My Prop	Comp Set	Index (ARI)	My Prop	Comp Set	Index (RGI)
Current Month	94.0	82.8	113.5	64.89	65.70	98.8	60.96	54.38	112.1
Year To Date	92.1	84.5	109.0	66.49	67.52	98.5	61.25	57.06	107.3
Running 3 Month	94.4	79.0	119.6	62.95	62.95	100.0	59.43	49.70	119.6
Running 12 Month	89.5	83.1	107.7	66.44	67.39	98.6	59.45	56.01	106.1

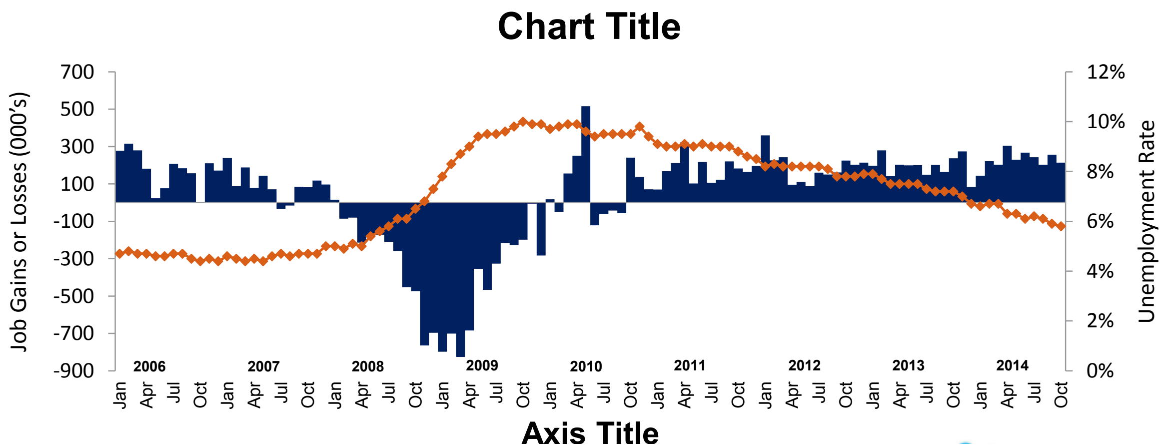
October 2014 vs. 2013 Percent Change (%)									
	Occupancy			ADR			RevPAR		
	My Prop	Comp Set	Index (MPI)	My Prop	Comp Set	Index (ARI)	My Prop	Comp Set	Index (RGI)
Current Month	6.4	1.6	4.8	0.9	6.2	-5.0	7.4	7.8	-0.4
Year To Date	5.8	0.5	5.2	15.1	8.2	6.4	21.7	8.7	12.0
Running 3 Month	8.5	-2.6	11.4	4.5	6.0	-1.5	13.4	3.3	9.8
Running 12 Month	8.1	1.9	6.1	16.2	8.3	7.3	25.6	10.3	13.8

LATEST RESEARCH

Economic Indicators

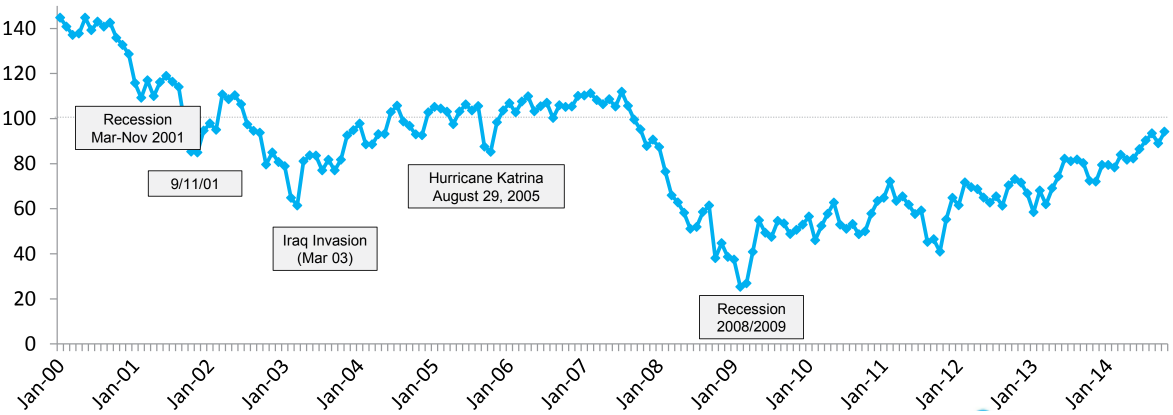
U.S. Labor Market

8.66 million jobs lost from 2008 – 2009; net gain of 9.7 million jobs since Jan 2010



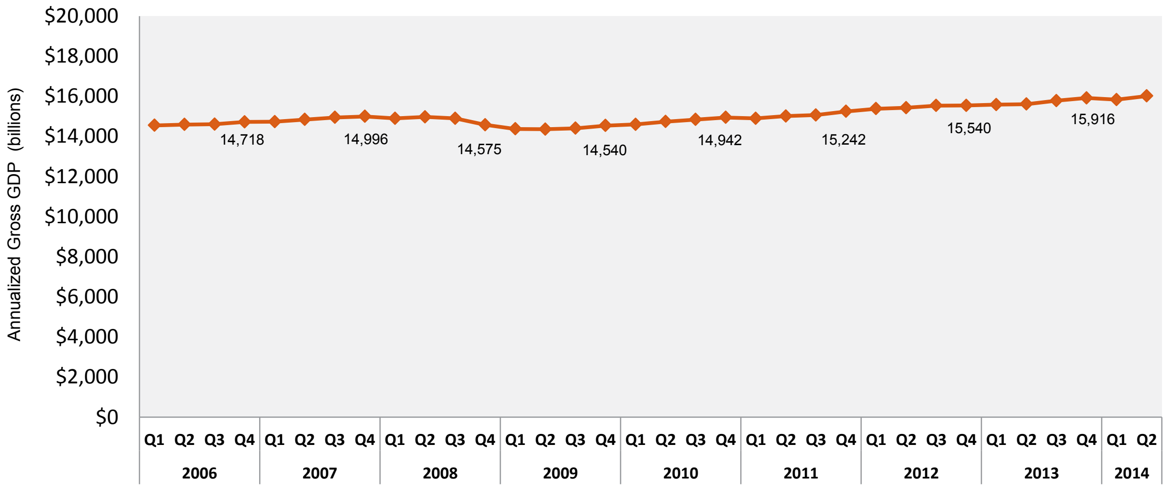
Consumer Confidence Index

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



Economic Indicators

U.S. GDP



Orlando Visitation

2013 Impact of Tourism

- $35.4 billion in visitor spending
- Tourism accounted for an estimated 392,500 direct industry jobs
- $15.5 billion annual earned wages
  - –$8.5 billion direct
  - – $7 billion indirect and induced

Visitor Snapshot

Visitor Volumes *(millions)*	2008	2009	2010	2011	2012	2013	13/12
Total	**48.858**	**46.583**	**51.455**	**55.168**	**57.158**	**59.270**	**3.7%**
Domestic	**45.515**	**43.319**	**47.780**	**51.365**	**52.889**	**54.414**	**2.9%**
Leisure	35.282	33.992	38.263	41.432	42.828	44.286	3.4%
Business	10.233	9.326	9.517	9.933	10.061	10.128	0.7%
International	**3.343**	**3.264**	**3.675**	**3.803**	**4.269**	**4.856**	**13.8%**
Canada	.910	.865	.960	1.015	1.085	1.140	5.1%
Overseas	2.433	2.399	2.715	2.788	3.184	3.716	16.7%
U.K.	.959	.831	.839	0.767	0.730	0.759	4.0%

2013 International Visitor Volume to U.S.

International Visitors to Orlando 2009-2013

	2009	2010	2011	2012	2013	% change 11/12
Europe	1,386,000	1,462,000	1,355,000	1,348,000	1,341,000	-0.5%
Western Europe	1,339,000	1,422,000	1,319,000	1,304,000	1,276,000	-2.1%
United Kingdom	831,000	839,000	767,000	730,000	759,000	4.0%
Germany	-	-	-	-	-	-
Eastern Europe	47,000	40,000	36,000	44,000	65,000	47.7%
Caribbean	-	-	-	-	-	-
South America	-	822,000	883,000	1,285,000	1,681,000	30.8%
Argentina	-	-	-	-	-	-
Brazil	-	-	-	639,000	768,000	20.2%
Venezuela	-	-	-	-	-	-
Central America	-	-	-	-	-	-
Africa	-	-	-	-	-	-
Middle East	-	-	-	-	-	-
Asia	-	-	-	-	-	-
Japan	-	-	-	-	-	-
Oceania	-	-	-	-	-	-
Total Overseas	2,399,000	2,715,000	2,788,000	3,184,000	3,716,000	16.7%
Canada*	865,000	960,000	1,015,000	1,085,000	1,140,000	5.1%
Total International	3,264,000	3,675,000	3,803,000	4,269,000	4,856,000	13.8%

*Visit Orlando® estimate.

Note: Missing data (as denoted by a dash) is due to small sample sizes.

Source: U.S. Department of Commerce, International Trade Administration, National Travel and Tourism Office

Top U.S. Destinations for International Visitors

Overseas Visitors to Select U.S. States and Territories 2012- 2013

2013 Rank	Destination (State/Territory)	2012 Market Share	2012 Visitation (000)	2013 Market Share	2013 Visitation (000)	Volume Change (%)
1	New York	31.3%	9,315	30.6%	9,804	5%
2	Florida	22.1%	6,577	22.5%	7,209	10%
3	California	20.2%	6,012	20.2%	6,472	8%
4	Hawaii	9.5%	2,827	9.9%	3,172	12%
5	Nevada	9.3%	2,768	9.1%	2,915	5%
6	Texas	4.5%	1,339	4.9%	1,570	17%
7	Guam	4.7%	1,399	4.6%	1,474	5%
8	Illinois	4.7%	1,399	4.5%	1,442	3%
9	Massachusetts	4.5%	1,339	4.3%	1,378	3%
10	Pennsylvania	3.2%	952	3.1%	993	4%
11	New Jersey	2.9%	863	2.9%	929	8%
12	Arizona	2.7%	804	2.6%	833	4%
13	Georgia	2.5%	744	2.2%	705	-5%
14	Washington	1.5%	446	1.6%	513	15%
15	Utah	1.6%	476	1.5%	481	1%
16	North Carolina	1.3%	387	1.2%	384	-1%
16	Colorado	1.5%	446	1.2%	384	-14%
18	Ohio	1.2%	357	1.1%	352	-1%
18	Virginia	1.3%	387	1.1%	352	-9%
18	Louisiana	1.0%	298	1.1%	352	18%
21	Maryland	1.0%	298	1.0%	320	7%

Source: U.S. Department of Commerce, International Trade Administration, National Travel and Tourism Office

Top U.S. Destinations for International Visitors

Overseas Visitors to Select U.S. Cities 2012 - 2013

2013 Rank	Destination (City)	2012 Market Share	2012 Visitation (000)	2013 Market Share	2013 Visitation (000)	Volume Change (%)
1	New York City	30.6%	9,107	29.9%	9,579	5%
2	Miami	11.7%	3,482	12.5%	4,005	15%
3	Los Angeles-Long Beach	11.4%	3,393	11.8%	3,781	11%
4	Orlando	10.7%	3,184	11.6%	3,716	17%
5	San Francisco	9.4%	2,798	9.5%	3,044	9%
6	Las Vegas	9.1%	2,708	8.9%	2,851	5%
7	Honolulu	7.5%	2,232	8.0%	2,563	15%
8	Washington, DC	5.9%	1,756	5.3%	1,698	-3%
9	Chicago	4.6%	1,369	4.3%	1,378	1%
10	Boston	4.2%	1,250	4.0%	1,282	3%
11	San Diego	2.6%	774	2.6%	833	8%
12	Houston	2.2%	655	2.5%	801	22%
13	Philadelphia	2.0%	595	2.1%	673	13%
14	Atlanta	2.2%	655	1.8%	577	-12%
15	Flagstaff-Grand Canyon-Sedona	1.8%	536	1.7%	545	2%
16	Anaheim - Santa Ana	1.6%	476	1.5%	481	1%
16	Seattle	1.4%	417	1.5%	481	15%
18	Tampa-St. Petersburg	1.4%	417	1.4%	449	8%
18	Dallas-Plano-Irving	1.4%	417	1.4%	449	8%
20	San Jose	1.4%	417	1.3%	416	0%

Overseas excludes Canada and Mexicc

Release Date: June 2014

Source: U.S. Department of Commerce, International Trade Administration, National Travel and Tourism Office

Advance Trip Decision

Overseas visitors to Orlando made their trip decisions on average 4.6 months in advance.

Among featured countries, Mexican air travelers and Colombian visitors made their trip decisions in the shortest timeframe, on average 2.5 months in advance. Visitors from the UK made their trip decision earliest, on average 6.8 months in advance.

	By Year			Country Comparison				
Advance Trip Decision	2011	2012	2013	United Kingdom	Germany	Brazil	Colombia	Mexico (air only)
Same Day	0%	---	0%	0%	0%	0%	0%	0%
1-3 Days	0%	1%	1%	1%	2%	1%	0%	1%
4-7 Days	2%	2%	1%	1%	3%	3%	2%	3%
8-14 Days	4%	3%	2%	2%	3%	2%	4%	6%
15-30 Days	13%	14%	12%	5%	12%	11%	33%	22%
31-60 Days	15%	18%	16%	9%	15%	19%	25%	29%
61-90 Days	12%	14%	18%	12%	19%	16%	16%	18%
91-120 Days	12%	10%	11%	8%	11%	13%	4%	7%
121-180 Days	20%	17%	17%	15%	20%	20%	14%	7%
181 or More Days	22%	21%	21%	47%	15%	15%	2%	6%
Average Number of Days	**141.2**	**131.1**	**137.1**	**205.3**	**115.1**	**125.2**	**75.2**	**76.0**
Average Number of Months	**4.7**	**4.4**	**4.6**	**6.8**	**3.8**	**4.2**	**2.5**	**2.5**

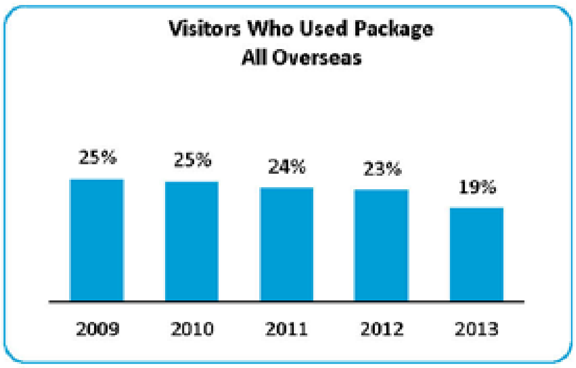
Business/convention visitors made their trip decision closer to the time of their trip than leisure visitors, 2.2 months versus 4.8 months, respectively.

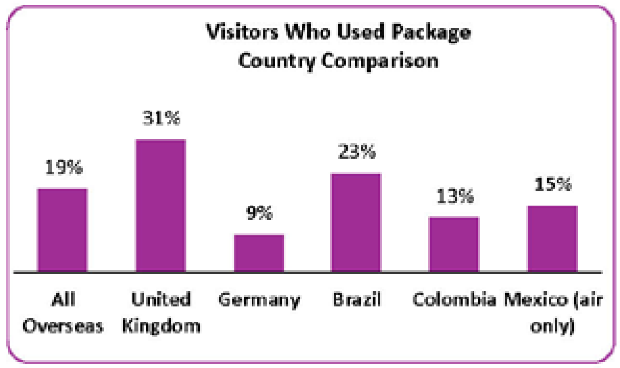
Visitors who traveled with children made their trip decision earlier (5.2 months) than those who traveled with adults only (3.9 months).

	Select Trip Characteristics					Origin Region	
Advance Trip Decision	Orlando Only	Leisure	Business/ Conv.	Adults Only	Adults w/ Children	South America	Western Europe (no UK)
Same Day	0%	0%	0%	0%	0%	0%	0%
1-3 Days	1%	1%	3%	1%	1%	1%	1%
4-7 Days	2%	1%	3%	2%	1%	1%	2%
8-14 Days	4%	1%	7%	3%	1%	1%	3%
15-30 Days	12%	11%	28%	16%	9%	14%	14%
31-60 Days	14%	15%	22%	20%	13%	17%	17%
61-90 Days	15%	18%	22%	18%	18%	22%	14%
91-120 Days	10%	12%	7%	10%	13%	13%	8%
121-180 Days	16%	18%	7%	14%	19%	19%	20%
181 or More Days	26%	23%	3%	16%	26%	12%	22%
Average Number of Days	**148.6**	**142.5**	**65.6**	**115.5**	**156.4**	**119.0**	**133.2**
Average Number of Months	**5.0**	**4.8**	**2.2**	**3.9**	**5.2**	**4.0**	**4.4**

Use of Package

Use of travel packages for Orlando travel among overseas visitors has been on a slight downward trend for the past three years, reaching a new low at 19% in 2013. Among those who used a package, attractions/events/entertainment (11%) and rental car (9%) were the most common combinations. Visitors from the UK (31%) were most likely to purchase a travel package in 2013. Travelers only visiting Orlando (25%) and adults traveling with children (24%) were the group types most likely to use a package.





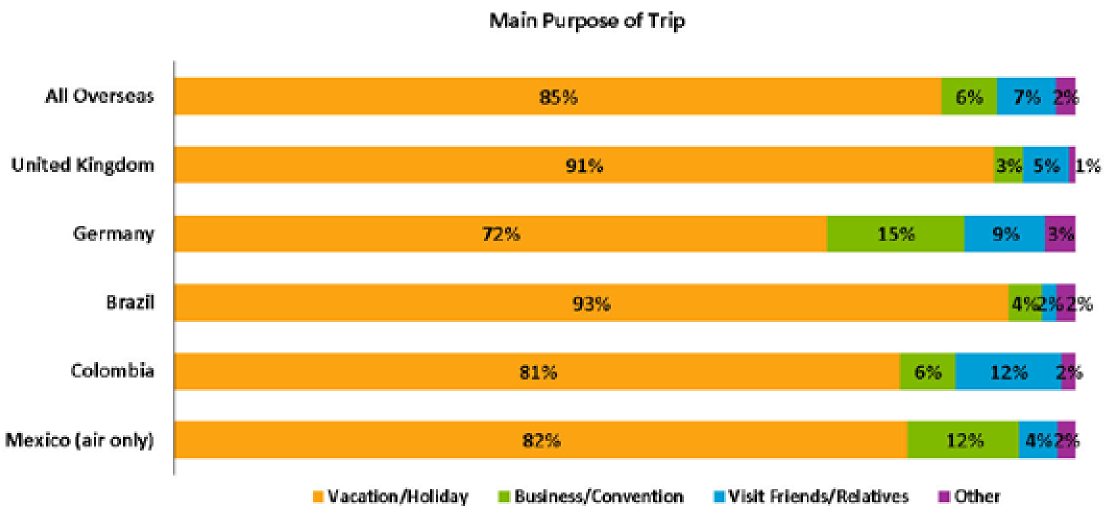
	By Year			Country Comparison				
Use of Package	2011	2012	2013	United Kingdom	Germany	Brazil	Colombia	Mexico (air only)
YES	**24%**	**23%**	**19%**	**31%**	**9%**	**23%**	**13%**	**15%**
(Yes, part of a prepaid, inclusive tour package. Airfare and accommodations must be included)								
Attractions/Events/Entertainment	n.a.	14%	11%	15%	2%	17%	8%	8%
Rental Car	n.a.	11%	9%	16%	2%	12%	1%	4%
Bus/Coach	n.a.	10%	8%	10%	3%	13%	7%	4%
Meals	n.a.	6%	5%	4%	3%	5%	6%	3%
Airfare and Accommodation Only	n.a.	3%	2%	4%	2%	1%	5%	4%
Guided Tours	n.a.	3%	2%	1%	1%	4%	2%	0%
Recreation	n.a.	2%	2%	1%	0%	2%	1%	1%
Cruise	n.a.	2%	2%	3%	1%	1%	1%	0%
Tour Guide for Entire Trip	n.a.	2%	1%	0%	0%	3%	0%	0%
Rail Tickets	n.a.	0%	1%	0%	0%	1%	0%	0%
No	**n.a.**	**77%**	**81%**	**69%**	**91%**	**77%**	**87%**	**85%**

Note: Percentages add to more than 100% due to multiple response.
Changes in the 2012 OTTI questionnaire does not allow detailed data to be merged with prior years' data.

Purpose of Trip

Overall, vacation/holiday (85%) remained the number one purpose of trip for the overseas visitors to Orlando.

Visitors from Germany and Mexico were more likely to visit Orlando for business or convention purposes than other countries listed.



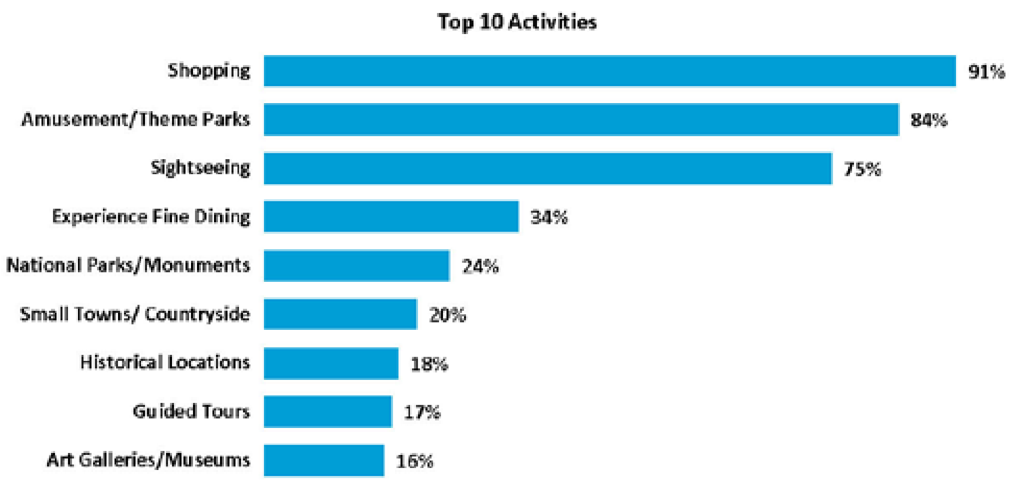
	By Year			Country Comparison				
Main Purpose of Trip	2011	2012	2013	United Kingdom	Germany	Brazil	Colombia	Mexico (air only)
Vacation/Holiday	84%	85%	85%	91%	72%	93%	81%	82%
Business/Convention	6%	7%	6%	3%	15%	4%	6%	12%
Business	4%	3%	3%	2%	7%	1%	4%	4%
Convention/Conference/Tradeshow	2%	4%	4%	2%	8%	2%	3%	9%
Visit Friends/Relatives	8%	6%	7%	5%	9%	2%	12%	4%
Other	2%	2%	2%	1%	3%	2%	2%	2%

	Select Trip Characteristics					Origin Region	
Main Purpose of Trip	Orlando Only	Leisure	Business/ Conv.	Adults Only	Adults w/ Children	South America	Western Europe (no UK)
Vacation/Holiday	86%	94%	13%	80%	98%	90%	79%
Visit Friends/Relatives	5%	4%	0%	12%	1%	5%	8%
Business	2%	1%	34%	4%	0%	2%	4%
Convention/Conference/Tradeshow	6%	1%	47%	4%	0%	2%	6%
Other	2%	1%	5%	1%	0%	2%	3%

Leisure Activities

Shopping, visiting amusement/theme parks and sightseeing remained the top activities among overseas visitors to Orlando in 2013.

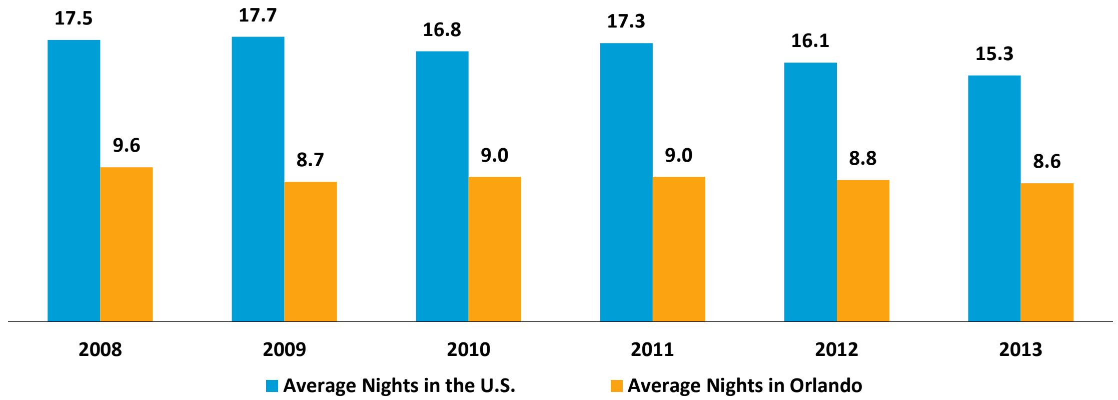
Compared to the average overseas visitor, visitors from Germany exhibited the highest interest in cultural/ethnic heritage sites than other visitors (22%). Brazilian visitors were more likely to enjoy night clubbing/dancing (28%) than an average overseas visitor to Orlando (14%).

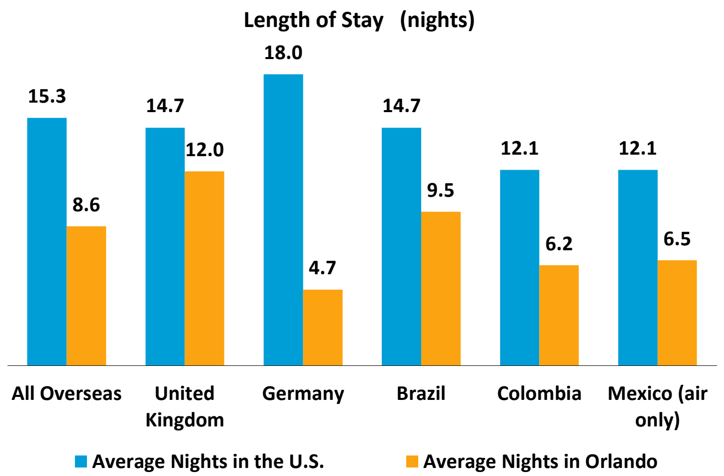


	By Year			Country Comparison				
Activities	2011	2012	2013	United Kingdom	Germany	Brazil	Colombia	Mexico (air only)
Shopping	93%	92%	91%	90%	89%	92%	98%	89%
Amusement/Theme Parks	86%	85%	84%	84%	73%	91%	79%	74%
Sightseeing	n.a.	72%	75%	75%	51%	67%	61%	42%
Experience Fine Dining	n.a.	31%	34%	27%	22%	21%	34%	24%
National Parks/Monuments	n.a.	29%	24%	15%	37%	28%	16%	3%
Small Towns/ Countryside	n.a.	20%	20%	23%	33%	8%	21%	12%
Historical Locations	30%	17%	18%	10%	24%	13%	13%	8%
Guided Tours	10%	20%	17%	16%	22%	14%	12%	2%
Art Galleries/Museums	14%	16%	16%	8%	17%	20%	10%	8%
Concert/Play/Musical	12%	14%	16%	9%	10%	24%	9%	14%
Nightclubbing/Dancing	12%	13%	14%	5%	11%	28%	13%	6%
Sporting Event	6%	9%	10%	6%	13%	9%	5%	3%
Cultural/Ethnic Heritage Sites	n.a.	8%	8%	4%	22%	7%	7%	9%
Water Sports	n.a.	8%	8%	10%	14%	5%	6%	3%
Casino/Gamble	6%	5%	7%	3%	6%	5%	5%	1%
Golfing/Tennis	5%	5%	5%	10%	8%	2%	2%	2%
Environment/Eco Excursions	3%	3%	3%	2%	6%	2%	2%	0%
Hunting/Fishing	1%	2%	1%	3%	1%	1%	1%	0%
Camping/Hiking	1%	2%	1%	1%	3%	1%	2%	4%

Note: Percentages add to more than 100% due to multiple response.
Changes in the NTTO questionnaire render some activities not directly comparable to prior years.

Length of Stay





Overseas visitors averaged 15.3 nights in the U.S. in 2013. The average number of nights spent in Orlando decreased slightly from 2012 to an average of 8.6 nights.

While total time in the U.S. has been on a slight downward trend for the past two years, the proportion of the trip dedicated to Orlando has been gradually rising, peaking at 56% in 2013.

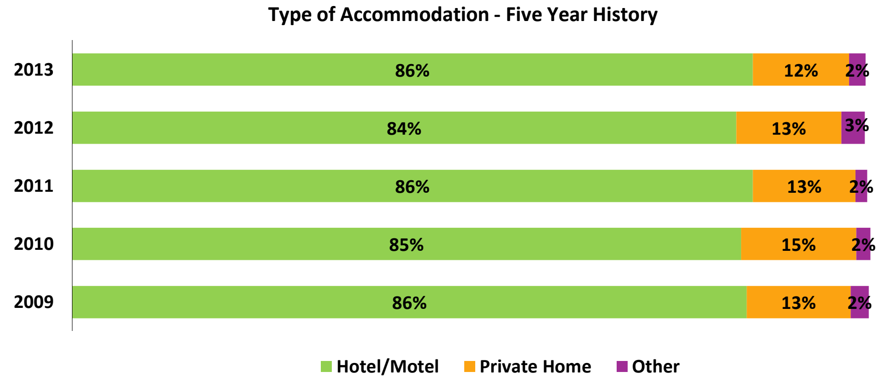
Visitors from the UK spent the most nights in Orlando (12.0 nights).

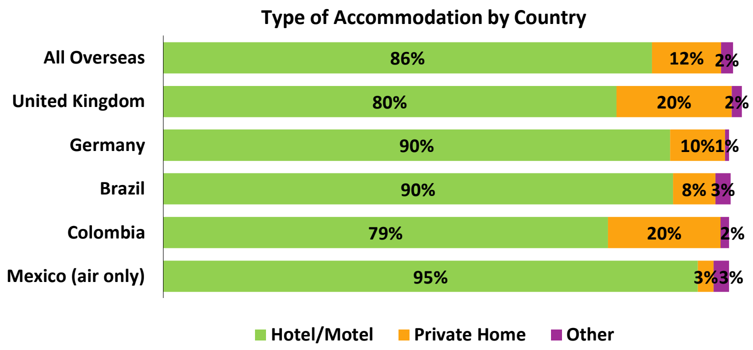
	By Year			Country Comparison				
Length of Stay	**2011**	**2012**	**2013**	**United Kingdom**	**Germany**	**Brazil**	**Colombia**	**Mexico (air only)**
Average Nights in the U.S.	17.3	16.1	15.3	14.7	18.0	14.7	12.1	12.1
Average Nights in Orlando	9.0	8.8	8.6	12.0	4.7	9.5	6.2	6.5
% of U.S. Nights in Orlando	52%	55%	56%	82%	26%	65%	51%	54%

Overseas leisure visitors spent more time in Orlando (8.5 nights) than their business counterparts (7.1 nights). Overseas visitors who traveled with children spent a greater portion of their trip to the U.S. in Orlando (65%) than parties without children (48%).

	Select Trip Characteristics					Origin Region	
Length of Stay	**Orlando Only**	**Leisure**	**Business/Conv.**	**Adults Only**	**Adults w/ Children**	**South America**	**Western Europe (no UK)**
Average Nights in the U.S.	11.8	14.2	12.9	16.4	14.3	13.9	16.8
Average Nights in Orlando	11.8	8.5	7.1	7.8	9.3	8.1	6.7
% of U.S. Nights in Orlando	100%	60%	55%	48%	65%	58%	40%

Type of Accommodations





Hotels and motels were the preferred accommodation type among all Orlando's overseas visitors in 2013, unchanged from the past four years.

Private homes were more popular among visitors from the UK and Colombia than from other featured countries.

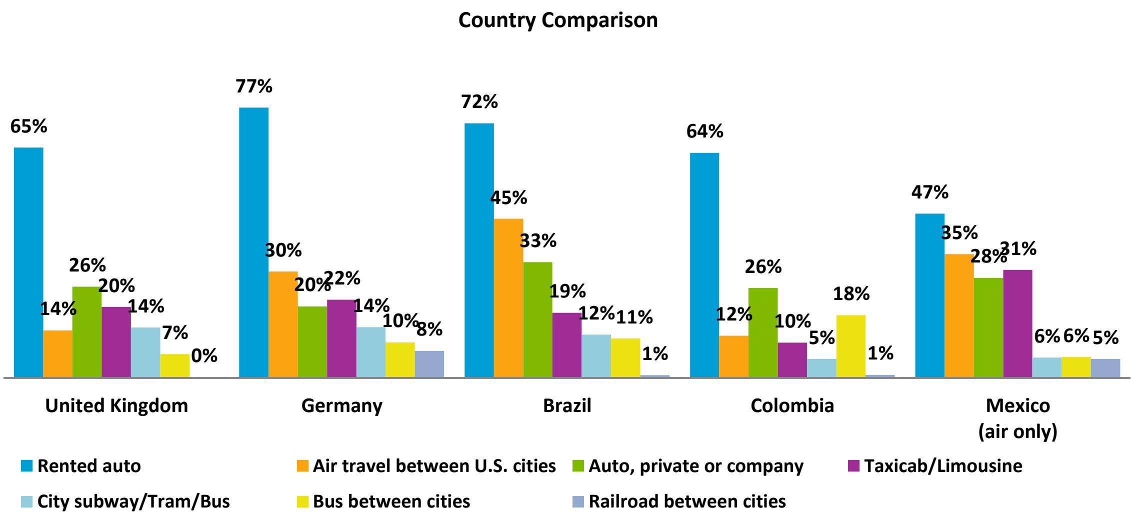
Type of Accommodation	By Year 2011	By Year 2012	By Year 2013	Country Comparison United Kingdom	Germany	Brazil	Colombia	Mexico (air only)
Hotel/Motel	86%	84%	86%	80%	90%	90%	79%	95%
Private Home	13%	13%	12%	20%	10%	8%	20%	3%
Other	2%	3%	2%	2%	1%	3%	2%	3%

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

Type of Accommodation	Select Trip Characteristics Orlando Only	Leisure	Business/ Conv.	Adults Only	Adults w/ Children	Origin Region South America	Western Europe (no UK)
Hotel/Motel	80%	88%	95%	86%	87%	89%	87%
Private Home	18%	11%	4%	12%	12%	10%	10%
Other	3%	2%	1%	2%	2%	2%	3%

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

Transportation with the U.S.



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

	By Year			Country Comparison				
Transportation in U.S.	**2011**	**2012**	**2013**	**United Kingdom**	**Germany**	**Brazil**	**Colombia**	**Mexico (air only)**
Rented auto	57%	65%	65%	65%	77%	72%	64%	47%
Air travel between U.S. cities	30%	36%	35%	14%	30%	45%	12%	35%
Auto, private or company	18%	30%	29%	26%	20%	33%	26%	28%
Taxicab/Limousine	30%	22%	20%	20%	22%	19%	10%	31%
City subway/Tram/Bus	14%	16%	15%	14%	14%	12%	5%	6%
Bus between cities	8%	12%	13%	7%	10%	11%	18%	6%
Railroad between cities	6%	3%	2%	0%	8%	1%	1%	5%

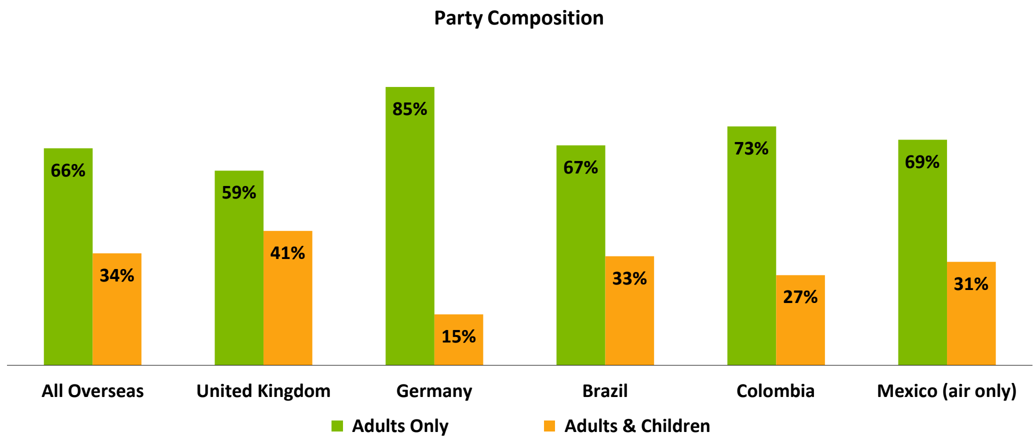
Note: Percentages add to more than 100 due to multiple response.

	Select Trip Characteristics					Origin Region	
Transportation in U.S.	**Orlando Only**	**Leisure**	**Business/ Conv.**	**Adults Only**	**Adults w/ Children**	**South America**	**Western Europe (no UK)**
Rented auto	65%	69%	45%	62%	69%	70%	67%
Air travel between U.S. cities	35%	34%	50%	39%	32%	33%	40%
Auto, Private or Company	29%	27%	31%	29%	28%	31%	26%
Taxicab/Limousine	20%	19%	34%	25%	15%	14%	22%
City Subway/Tram/Bus	15%	15%	19%	19%	11%	10%	20%
Bus between cities	13%	13%	10%	12%	14%	16%	11%
Railroad between cities	2%	2%	6%	3%	1%	1%	5%

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

Party Composition

The majority of overseas visitors to Orlando continued to travel with adults only rather than with children. On a per country basis, UK visitors were more likely to travel with children than the average overseas visitor. The higher proportion of parties with kids also resulted in the largest average party size for the UK at 2.7 persons.

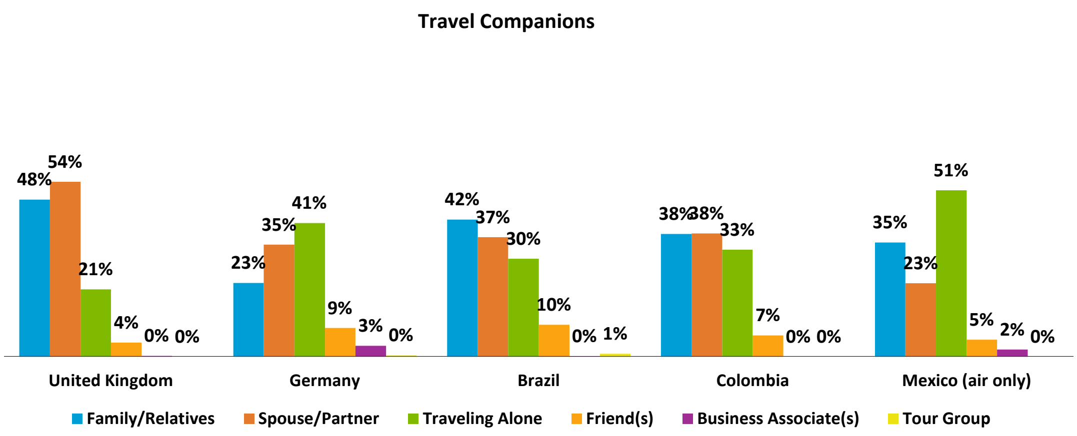


Party Composition	2011	2012	2013	United Kingdom	Germany	Brazil	Colombia	Mexico (air only)
	By Year			Country Comparison				
Total Average Party Size	**2.3**	**2.5**	**2.4**	**2.7**	**1.8**	**2.5**	**2.2**	**2.1**
Adults Only	70%	66%	66%	59%	85%	67%	73%	69%
Adults & Children	30%	34%	34%	41%	15%	33%	27%	31%
Total Adults Only - Avg	**1.6**	**1.7**	**1.7**	**1.8**	**1.6**	**1.8**	**1.6**	**1.3**
1 Adult	55%	48%	46%	35%	51%	45%	45%	77%
2 Adults	35%	41%	43%	53%	44%	41%	46%	17%
3 Adults	7%	5%	5%	5%	3%	6%	5%	3%
4+ Adults	4%	7%	6%	7%	3%	8%	4%	3%
Adults & Children - Avg	**3.8**	**4.0**	**3.8**	**3.9**	**3.4**	**4.0**	**3.6**	**3.8**

Party Composition	Orlando Only	Leisure	Business/ Conv.	Adults Only	Adults w/ Children	South America	Western Europe (no UK)
	Select Trip Characteristics					Origin Region	
Total Average Party Size	**2.4**	**2.6**	**1.5**	**1.7**	**3.8**	**2.6**	**2.1**
Adults Only	65%	61%	93%	100%	---	62%	77%
Adults & Children	35%	39%	7%	---	100%	38%	23%
Total Adults Only - Avg	**1.6**	**1.8**	**1.3**	**1.7**	**---**	**1.7**	**1.6**
1 Adult	52%	36%	79%	46%	---	44%	45%
2 Adults	38%	52%	16%	43%	---	44%	50%
3 Adults	5%	5%	3%	5%	---	6%	2%
4+ Adults	4%	7%	3%	6%	---	6%	3%
Adults & Children - Avg	**3.8**	**3.9**	**3.9**	**---**	**3.8**	**3.9**	**3.7**

Travel Companions

Family/relatives and spouse/partner continued to be the two most common groups of travel companions for overseas visitors to Orlando in 2013. Compared to other featured countries, visitors from the UK were more likely to travel either with family/relatives or their spouse/partner, while German, Brazilian, Colombian and Mexican (air only) visitors reported higher proportions of traveling alone.



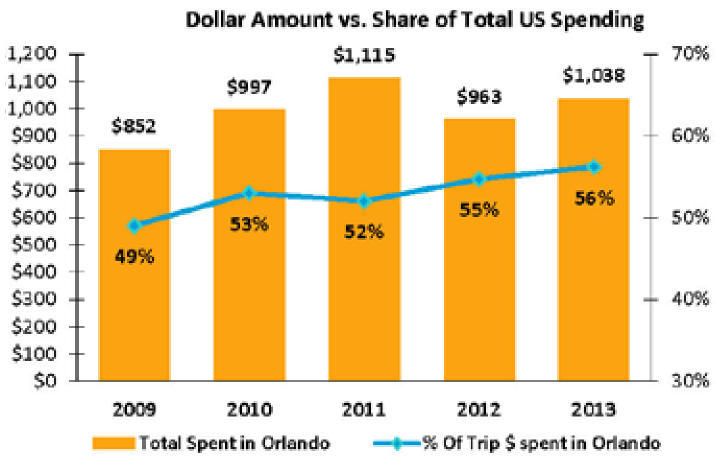
	By Year			Country Comparison				
Travel Companions	**2011**	**2012**	**2013**	**United Kingdom**	**Germany**	**Brazil**	**Colombia**	**Mexico (air only)**
Family/Relatives	58%	42%	42%	48%	23%	42%	38%	35%
Spouse/Partner	38%	41%	41%	54%	35%	37%	38%	23%
Traveling Alone	16%	31%	31%	21%	41%	30%	33%	51%
Friend(s)	12%	7%	6%	4%	9%	10%	7%	5%
Business Associate(s)	2%	1%	1%	0%	3%	0%	---	2%
Tour Group	1%	0%	0%	---	0%	1%	---	---

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

	Select Trip Characteristics					Region Origin	
Travel Companions	**Orlando Only**	**Leisure**	**Business/ Conv.**	**Adults Only**	**Adults w/ Children**	**South America**	**Western Europe (no UK)**
Family/Relatives	5%	48%	11%	13%	99%	48%	29%
Spouse/Partner	37%	47%	11%	37%	48%	40%	43%
Traveling Alone	34%	22%	73%	46%	---	27%	35%
Friend(s)	5%	7%	3%	7%	4%	8%	5%
Business Associate(s)	1%	0%	5%	1%	0%	0%	1%
Tour Group	0%	0%	0%	0%	1%	1%	0%

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

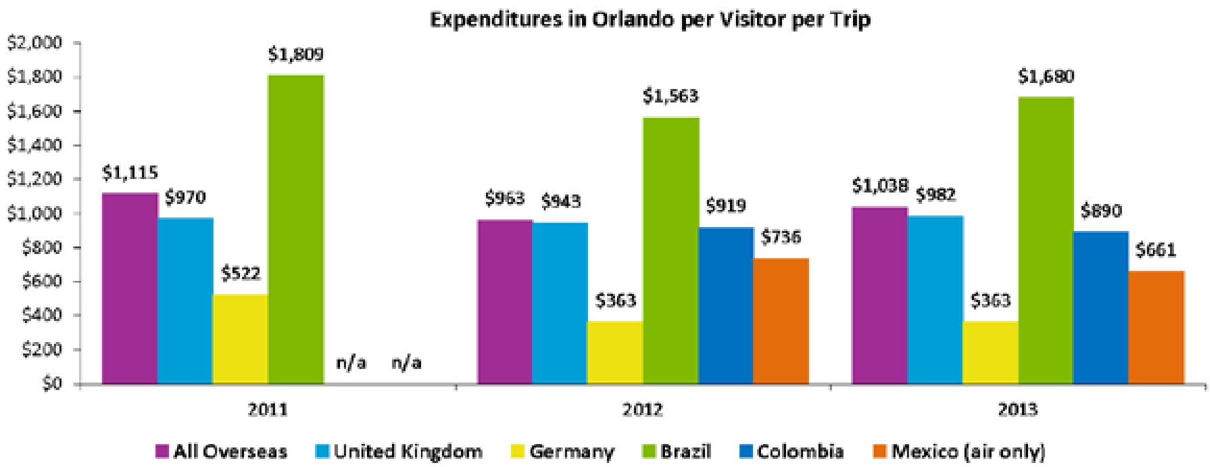
Expenditures Per Visitor Per Trip



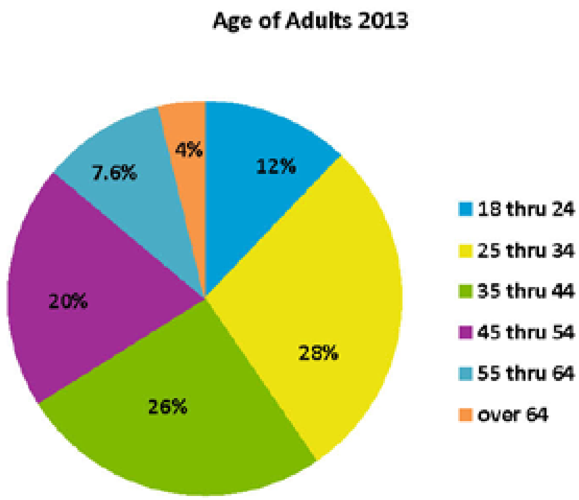
In 2013, Overseas visitors to Orlando allocated more than half of their total U.S. trip dollars to be spent in Orlando (56%).

In 2013, the average spending by overseas visitors to Orlando increased 8% to $1,038 per person per trip.

Brazilian visitors spent 65% more in Orlando ($1,680) than the next closest featured country, the UK ($982).



Age of Adults



Overall, the average age of overseas visitors to Orlando in 2013 was 39.5 years. The core age group of 25 - 54 represented 74% of the total.

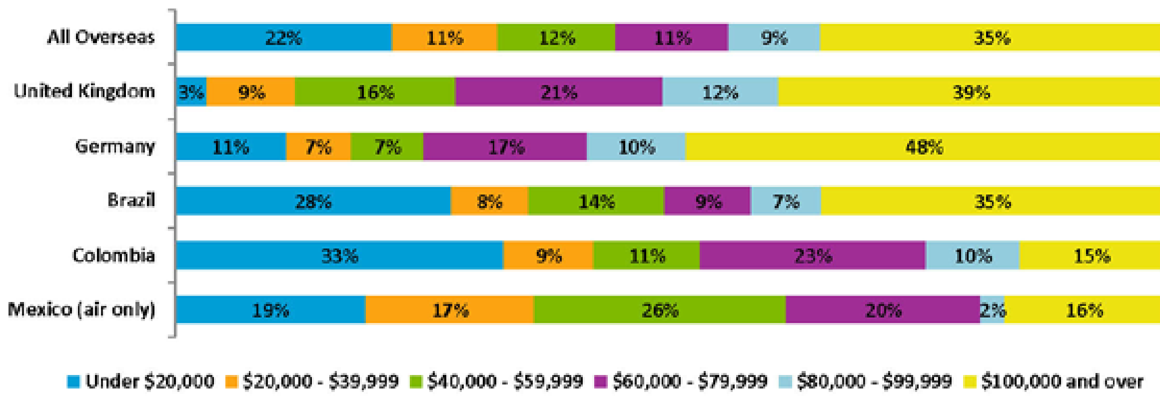
Among the featured countries, the age distribution was younger among Brazilian visitors.

	By Year			Country Comparison				
Age of Adults	**2011**	**2012**	**2013**	**United Kingdom**	**Germany**	**Brazil**	**Colombia**	**Mexico (air only)**
Average Age	**40.6**	**39.8**	**39.5**	**43.3**	**40.8**	**36.8**	**41.4**	**39.2**
18-24 Years Old	10%	10%	12%	10%	11%	12%	11%	10%
25-34 Years Old	21%	29%	28%	19%	28%	38%	23%	24%
35-44 Years Old	35%	27%	26%	26%	24%	26%	21%	37%
45-54 Years Old	22%	21%	20%	24%	23%	16%	32%	19%
55-64 Years Old	9%	9%	10%	14%	8%	6%	8%	8%
65+ Years Old	4%	4%	4%	8%	7%	2%	5%	2%

	Select Trip Characteristics					Origin Region	
Age of Adults	**Orlando Only**	**Leisure**	**Business/ Conv.**	**Adults Only**	**Adults w/ Children**	**South America**	**Western Europe (no UK)**
Average Age	**40.1**	**39.2**	**38.7**	**38.6**	**41.2**	**38.3**	**40.1**
18-24 Years Old	12%	12%	15%	16%	5%	12%	13%
25-34 Years Old	26%	28%	29%	36%	14%	31%	22%
35-44 Years Old	28%	27%	22%	14%	48%	28%	28%
45-54 Years Old	19%	21%	21%	16%	28%	19%	19%
55-64 Years Old	11%	9%	10%	13%	4%	8%	14%
65+ Years Old	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	3%

Source: U.S. Department of Commerce, International Trade Administration, National Travel and Tourism Office

Household Income



	By Year			Country Comparison				
Household Income	2011	2012	2013	United Kingdom	Germany	Brazil	Colombia	Mexico (air only)
Average Income	**$91,800**	**$93,001**	**$90,887**	**$108,357**	**$112,733**	**$97,729**	**$63,377**	**$61,614**
Under $20,000	9%	20%	22%	3%	11%	28%	33%	19%
$20,000 - $39,999	12%	9%	11%	9%	7%	8%	9%	17%
$40,000 - $59,999	16%	13%	12%	16%	7%	14%	11%	26%
$60,000 - $79,999	14%	14%	11%	21%	17%	9%	23%	20%
$80,000 - $99,999	10%	10%	9%	12%	10%	7%	10%	2%
$100,000 and over	39%	34%	35%	39%	48%	35%	15%	16%

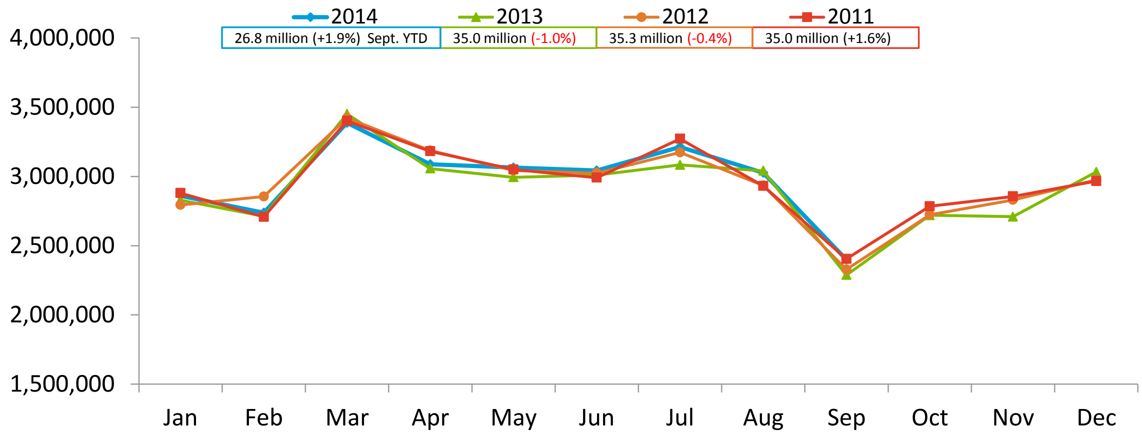
	Select Trip Characteristics					Origin Region	
Household Income	Orlando Only	Leisure	Business/ Conv.	Adults Only	Adults w/ Children	South America	Western Europe (no UK)
Average Income	**$89,449**	**$91,158**	**$98,983**	**$83,560**	**$97,318**	**$82,472**	**$122,212**
Under $20,000	17%	21%	23%	25%	20%	30%	10%
$20,000 - $39,999	10%	11%	10%	13%	9%	13%	5%
$40,000 - $59,999	13%	12%	9%	14%	11%	11%	8%
$60,000 - $79,999	15%	12%	8%	11%	12%	8%	12%
$80,000 - $99,999	10%	9%	10%	8%	10%	8%	9%
$100,000 and over	35%	35%	40%	29%	40%	31%	57%

Source: U.S. Department of Commerce, International Trade Administration, National Travel and Tourism Office

Market Performance Indicators

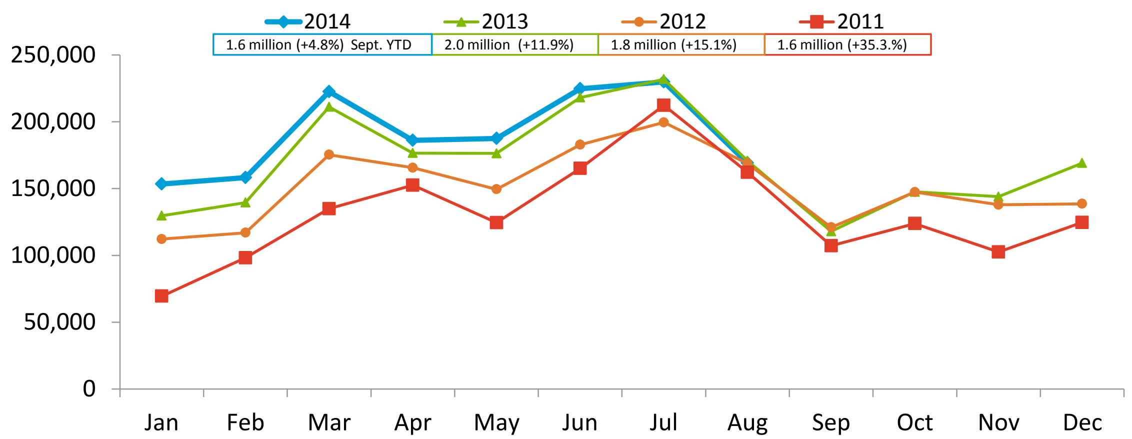
- Airport Passenger Traffic
- Port Canaveral Cruise Passengers
- Convention Center Attendance
- Hotel metrics

Orlando International Airport
Passenger Traffic



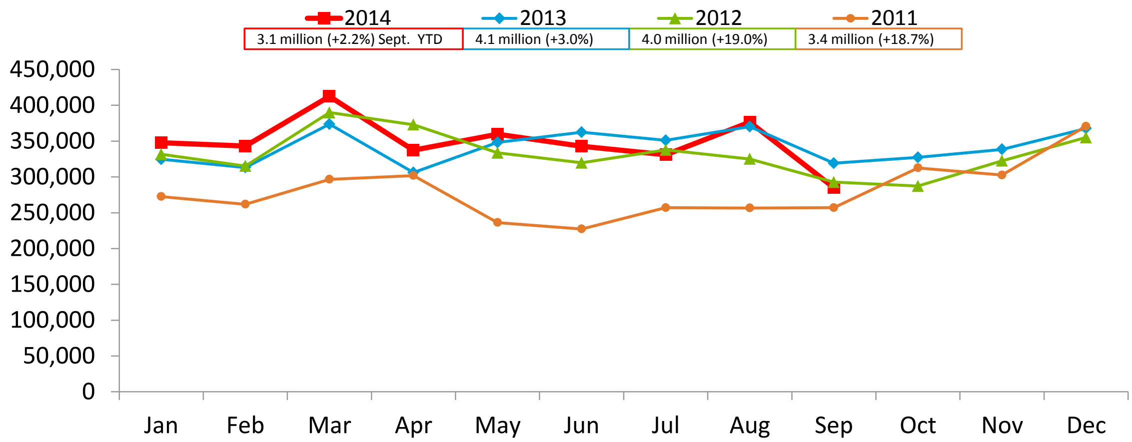
Market Performance Indicators

Orlando-Sanford International Airport
Passenger Traffic



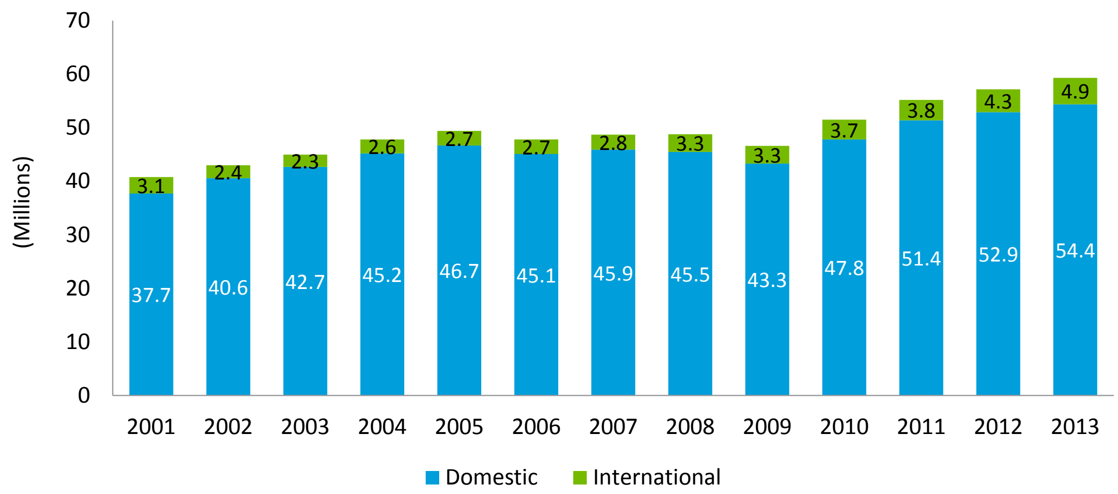
Note: Allegiant Air moved services to OIA in 2010, and returned all services to Sanford in 2011.

Port Canaveral
Cruise Traffic



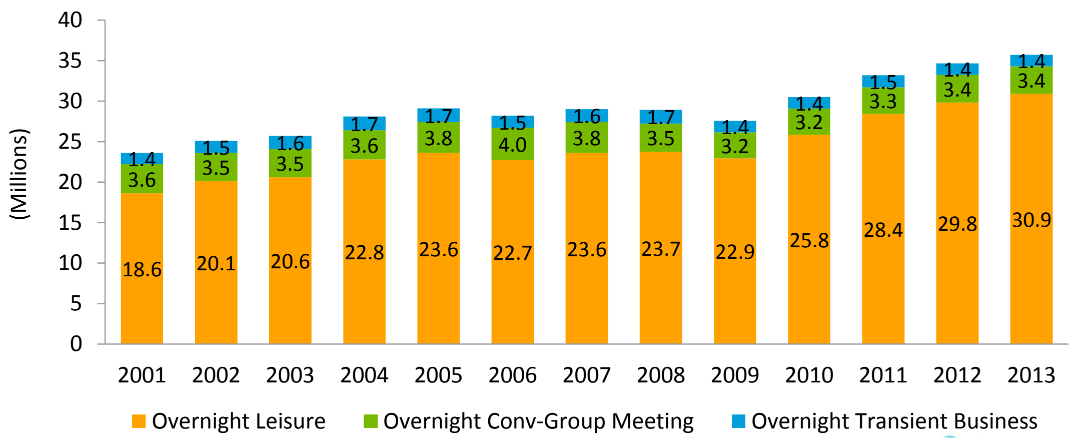
Orlando Visitation

Metro Orlando Visitor Volume



Overnight Domestic Visitors

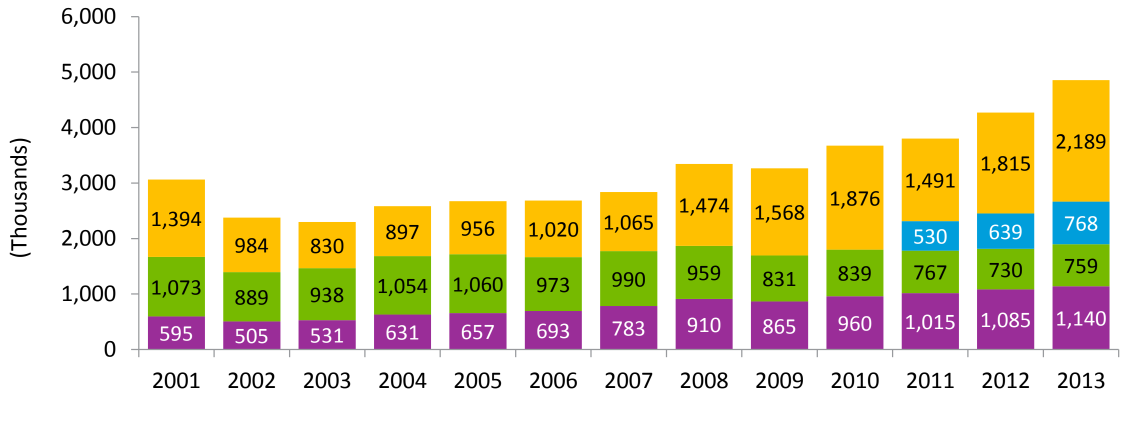
Overnight visitors account for two-thirds (66%) of all domestic visitors.
Leisure travelers represent 86% of domestic overnight visitors.



Orlando Visitation

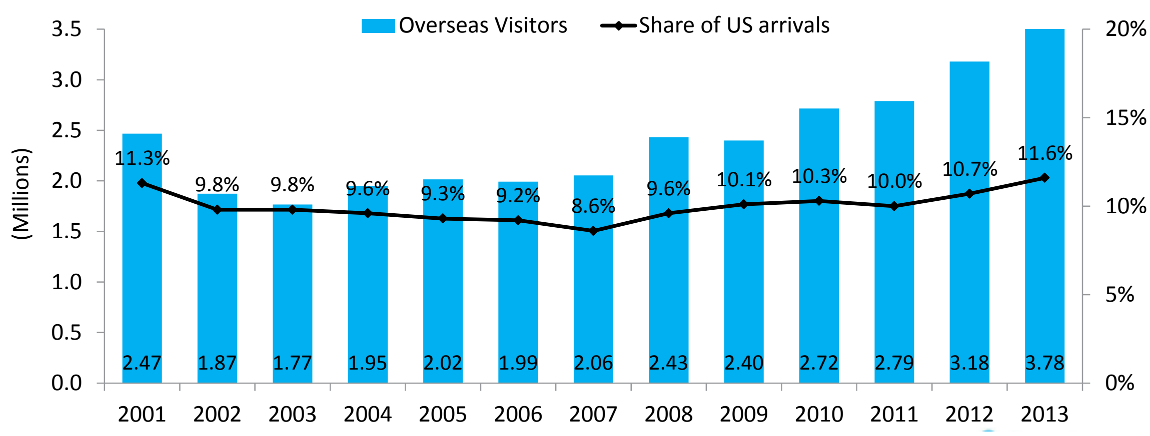
International Visitors

In 2013, Brazil has surpassed the UK as the top overseas source market to Orlando.



Overseas Visitor and U.S. Market Share

Overseas visitors (excluding Canada & Mexico) to Orlando increased in 2013, as did Orlando's share of overseas arrivals to the U.S.



STRENGTHS & OPPORTUNITY ANALYSIS

Competition

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 wireless internet access - Fitness center - Restaurant and cocktail lounge - Pool bar (seasonal) - Coffee shop / deli - Complimentary continental breakfast - Meeting space - Full business services - Microwave, fridge and coffee maker - Complimentary shuttle to Universal, SeaWorld and Aquatica - In room safes - Tennis and Basketball court - Pet friendly - Heated outdoor pool
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:
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. Hotel is pet friendly and has 37 inch plasma TV's in all rooms.

Competition

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 Disney, Universal, Seaworld - Complimentary Wi-Fi - Heated outdoor pool - Fitness center - Business center - Pillow top mattresses - Guest laundry - Meeting room - 24 Hour Market
Weakness:	- 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:
Great location for business and leisure travelers. Guests of this hotel will appreciate the free scheduled transportation to major area attractions.

Competition

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 Wi-Fi - Outdoor pool and spa - New Flat screen HD TV's in all rooms with 30 channels - Plug and Play TV feature – simple to connect electronics - Pillow top mattresses - Lounge / Bar - Full service TIKI bar - Games arcade - Complimentary transportation to Disney and Universal. - Fitness center
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:
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. All rooms have new Samsung slat screen HD TV'S with a Plug and Play feature, making it simple to connect electronics. Hotel is in a great location.

Competition

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 - Outdoor pool - Conference and meeting rooms - Complimentary Wi-Fi in public areas - Flat screen TV/30 channels in rooms - Game Room - In Room safes
Weakness:	- 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:	$3.50
Market:	Leisure, business and group.

Overview / Conclusion:
Great location, property is dated but has added new pillow top beds and flat screen TV to rooms. Exterior room access only and there is a charge for wired internet access in rooms. Complimentary transportation to Universal and SeaWorld is a draw for families.

Competition

Hotel:	The Point Orlando Resort
Number of Rooms:	215
Date Property was built:	2008
Distance from Hotel:	0.34 miles
Strengths:	- Wi-Fi 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 Disney, Universal, SeaWorld and Wet 'n' Wild - Keurig coffee makers in all rooms - Meeting room - In Room safe - Garden Grocer
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. Property offers Garden Grocer service, order prior to arrival and groceries will be delivered. Overall a very attractive property.

Our Property

Hotel:	The Enclave Suites
Number of Rooms:	321
Date Property was built:	1986
Strengths:	- 24 Hour front desk - Complimentary "grab and go" snack breakfast - Food court - Complimentary transportation to Universal, SeaWorld and Wet 'n' Wild - Complimentary Wi-Fi - Fitness room - Two outdoor pools and two kiddie pools and Jacuzzi - One indoor heated pool and indoor Jacuzzi - Guest laundry - Gift shop / Convenience store - Meeting space - staySky Kids Club (seasonal) - In room safes (nominal fee) - Games room - Most rooms renovated - Tennis court, table tennis, basketball ½ court
Weakness:	- No resort bar - Dated décor and furnishings
Resort Fee:	None
Market:	Leisure, business and group.

Overview / Conclusion:
Excellent location and facilities. 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.

Our Service Offering / Differentiate

Strengths

- Experienced reservation staff
- Proximity to International Drive
- Multi property cross selling
- On Demand movies
- Multiple oversized pools
- Indoor pool & kiddie pool
- Self-service laundry facilities
- Multiple hot tubs
- Lake front gazebo
- Kids quarters
- staySky Kids Club
- 24 hour call answering service
- Proximity to Universal & Disney
- Deluxe Studios & 2 Bedroom Suites
- Daily cleaning services
- Complimentary shuttle transportation
- Sophisticated food & beverage operations
- First Class owner program
- Luxury equipped kitchens
- Complimentary breakfast
- Flood lit tennis court
- Food court area renovations
- Gold Star in Sustainable Tourism
- Game room

Opportunities

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

MARKETING STRATEGY

Marketing Objective

Enclave Suites…**A Whole New Experience!**

Our slogan at staySky Hotels & Resorts, ”A Whole New Experience!” is offering our guests more than just a hotel; in fact, we are offering the whole experience of staying at a comfortable and accommodating resort in the middle of Orlando! Our slogan also goes hand-in-hand with our mission, which is “To provide an outstanding level of service and facilities combined with exceeding our guests and owners needs and expectations.” We are committed to improving service quality and pursuing growth and learning within our company.

The Enclave Suites provides guests with one of the best values in the Orlando market. Not only are we offering a stay in the center of all the action on International Drive, there is also an ample amount of amenities featured throughout the resort. Amongst these services, we have unique rooms; balconies and tropically landscaped grounds all combined give guests an opportunity to enjoy an Orlando getaway without breaking their budget.

The Enclave Suites continues to offer exceptional services not provided by our competitors. We have also displayed our brand consistently through our website, special offers, and brochures throughout the resort. In 2014, the staySky Kids Club continued to be a huge success, as was the poolside BBQ’s. 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!

Target Marketing

Marketing the Enclave Suites has become a more efficient task thanks to the popularity of social sites, such as Facebook and Twitter. Through social media, we are able to continue targeting domestic and international travelers, but now we have an instant connection and the opportunity to build relationships beyond the length of a guests' vacation.

With the assistance of new digital marketing tools, our team is devoted to keeping guests engaged and informed on current and upcoming initiatives at Enclave Suites, and throughout Orlando. We continue to strengthening our existing relationships and always keep an eye out for new opportunities by attending a variety of conferences and seminars. Our strong partnerships with Visit Orlando, Visit Florida and Expedia will focus on targeting and capturing the attention of Orlando's inbound visitors, with efforts to drive brand awareness. In 2014, we hosted an average of two media bloggers each month that has resulted in positive brand exposure, marketing, and an organic digital presence for the Enclave Suites.

According to a recent survey by ABTA, consumers are planning to spend 20% more on holiday travel in 2015, while 50% plan to spend about the same as in 2014. This is an increase from last years' consumer reports, which is good news that will definitely benefit the travel industry.

We will continue to efficiently execute our marketing and sales tactics, and ensure our marketing initiatives are generating a greater return throughout 2015.

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
- Average Household Income
  - $89,342
- Top Activities
  - Theme Park/Amusement
  - Shopping
  - Golf and Sporting Activities
  - Museums and Arts
- Average Length of Stay
  - 4.5 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
  - $90,887
- Top Activities
  - Theme Park/Amusement
  - Shopping
  - Sightseeing
- Average Length of Stay
  - 15.3 Nights
- Transportation
  - Air

Advertising & Sales

Radio:

VisitFlorida.com WRDW-FM Philadelphia Promotion
VisitFlorida.com WQHT-FM New York Promotion

Print:

Capitol Brochure Space
I-10 Brochure Space
I-75 Brochure Space
US-231 Brochure Space
I-10 Transparency and I-95 Transparency

Domestic Print:

Visit Orlando Magicard Program
Visit Orlando Fulfillment Kit Inserts
AAA Going Places South - SPRING EOM
AAA Going Places South - FALL FLORIDA & SE
America's Best Vacations SE Newspaper Inserts - SPRING & FALL SOUTHEAST
America's Best Vacations Newspaper Insert FALL IN-STATE
Visit Orlando Direct Marketing Campaign - SPRING & FALL
Visit Orlando 300 X 100 Tile Ad
Visit Orlando Text Ad
Visit Orlando Enhanced Listings

International Print:

Visit Orlando International Visitors Guides & Digital Guide
Visit Orlando Canadian Automobile Association (CAA)
Ontario and Atlantic Provinces
Visit Orlando Canada Newspaper Campaign Toronto Star –Ontario
Visit Orlando International Website Canada
Visit Orlando Tour & Travel Reference Manual & Digital Guide

Online:

TravelClick
Expedia.com
Expedia Canada
Hotels.com Brazil (Hoteis.br)
Expedia Canada (English)

Example of Advertising & Sales Initiatives

Shows/Other:

Florida Huddle
South Carolina Motorcoach
Tennessee Motorcoach Association
Georgia Motorcoach
American Bus Association
NTA - National Tour Association Tradeshow
Sky Travel Agent Reward Program (STAR)
Sky Guest Reward Program
Social Media Advertising
Thomas Cook CA Brochure
Tour Operator Res Incentives
TripAdvisor Business Listing
Brazil Agency Marketing
Transat CA Brochure
Texas Bandmasters Tradeshow
SYTA – Student Youth Travel Association Tradeshow
Golfpac Preferred Marketing Partner
Hotelbeds Workshop
Latin Publications
Stella Brochure
Travel Impressions Brochure
Virgin Holidays Brochure
US Travel Pow Wow
US Travel Associations
UK Publications / Sponsorship Events

Online Presence

The fall of 2014 we saw the launch of the newly redesigned EnclaveSuites.com website. Being fresh and relevant is the key to a successful online presence. The website now has more than 100 pages of content to ensure the site is completely optimized by today's Google standards and these standards change frequently.

Google implemented many changes in 2014 but, we've continued to stay on top of the changes and had great success with organic search. Google+ has grown in 2014 and we've had success in "capturing" our Google+ page to manage the content and reviews within.

In 2013 as part of our partnership with Golfpac Travel we added a Golfer's Desk page to the website. This page gives guests the opportunity to book their tee times. This page has been quite popular with guests to our website.

The theme park pages are also popular within the website and serves as a great opportunity to give those searching for Disney, Universal and Sea World information on our website to book our hotel. These pages have also helped us optimize the website as many guests are searching for hotels near the theme parks.

The success of the website in 2015 is expected to continue to bring new guests to our property. Repeat guests find comfort with our website knowing they can always reserve directly, knowing they have a best rate guarantee with the Enclave Suites.

Featured Blogs

" Making Strides Orlando is so easy; you don't even have to run. It's a pleasant walk with friends and family. I'm taking a girls weekend for Epcot's Food & Wine Festival, we'll be staying at The Enclave Hotel & Suites only a short distance from Lake Eola Park. I plan to participate, giving myself a challenge while doing a little toward finding the cure."

"Numerous hotels, such as the **Enclave Hotel & Suites** near Universal, will run shuttle buses hourly throughout the day, including the hour after the parks close. Why fight the traffic when you can sit back and chat with the family instead?"

Nearly 300 Social Shares

The Disney Blog

- Over 70 Social Shares
- Article shared with his nearly 20K social media fan base.

- 22 Tweets
- 251 Facebook shares
- 29 Google+ Shares
- 51 Stumble Upon Shares
- Over 50 Natural comments on article

- Tons of photos & Videos shared on this one

-Shared with his over 20K twitter followers
-Shared with his 6K Facebook Fans

Online Marketing

We continue to see an increase of visitors to our website and most certainly in 2014 with our newly redesigned responsive website that launched in September.

Responsive design provides an optimal viewing experience for the user across all types of computer screens, whether desktop, tablet or cell phone. We've also enlarged the images and increased the size, placement and color of the "Book Now" button based upon consumer research. By changing our website interface to a more responsive design, we are boosting our "re-visits" and enhancing the usability to make our site more productive for the user.

We are always watching to ensure that the content on our site is unique and relevant, we regularly review and update the content on all of our web pages. This further helps with our search engine appeal and to maximize our exposure.

Our team of experts at SEO Works have researched and developed keyword phrases that consumers are most likely to use when searching for lodging in the Orlando market. The Search Engine Optimization, also known as SEO, helps our site use proper title tags, description tags, and content that shouts out to our target audience and brings in a higher quality of traffic to ensure our property's overall goal will be accomplished.

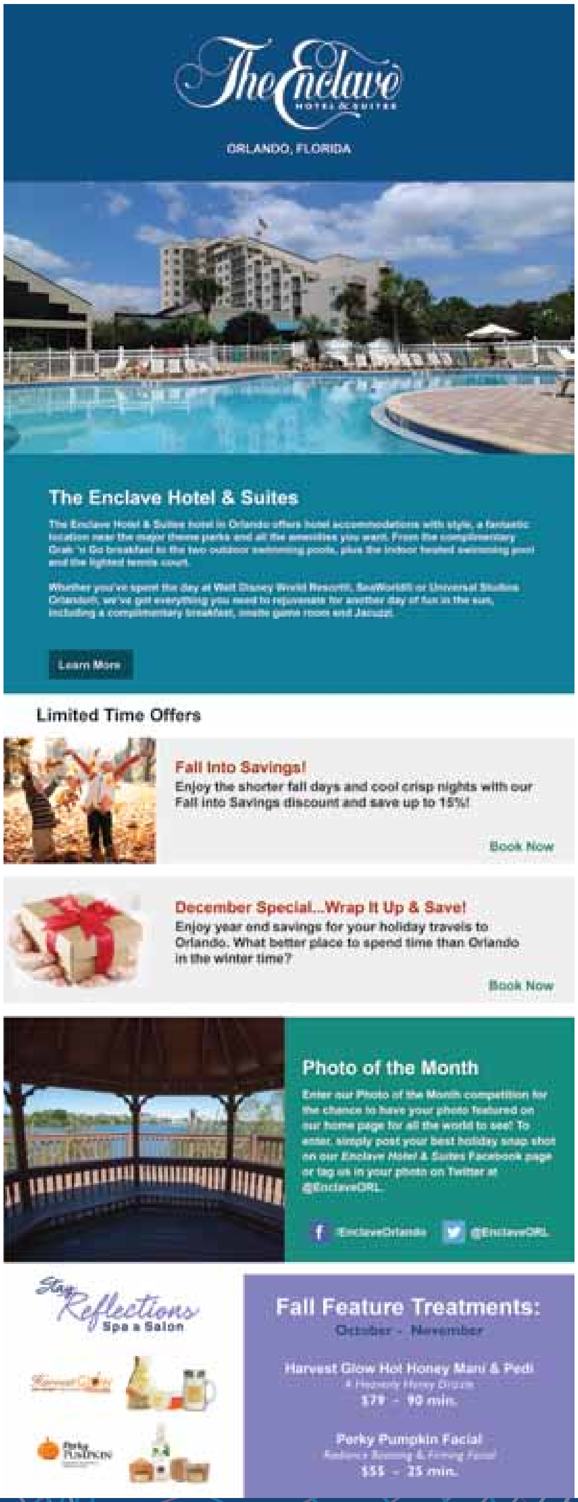
To further maximize the exposure, it is important to compliment the search engine website optimization with pay-per-click advertising campaigns. This type of advertising allows us to compete directly with channels of distribution such as Expedia, Hotels.com, Orbitz, and Travelocity by ensuring that our site gets top position. That means that when consumers are looking for the property, we can switch consumers from third party merchant bookings to direct reservations with us.

We use an email-marketing program which utilizes property information and photos to personalized our communication between potential direct consumers, travel agents and tour operators. To continue that communication, we have decided to send out email blasts every other week to stay in the fore front of their minds without filling their mailbox.

EXHIBITS

Advertising Design

Fall Email Blast



Fall is for Family Email Blast

Advertising Design

Deal Season Email Blast

Halloween Horror Nights Email Blast

Advance Booking Email Blast

Advertising Design

Cyber Monday Campaign Email Blast

Clue 1

Clue 2

Clue 3

Special Offer

Start of Cyber Monday

Advertising Design

Redesigned Website

Collateral

Hotel Portfolio

Collateral

Check-In Piece

Every building has an ice maker on the 5th floor as well as a washer and dryer on the 3rd and 4th floor.

TENNIS COURT
GAZEBO
POOL ONE
POOL TWO
FOOD COURT GIFT SHOP ARCADE
GYM
INDOOR POOL
FRONT DESK

WELCOME

Thank you for choosing Enclave Hotel & Suites for your stay in Orlando.

We want to assure you that our friendly staff is eager to assist you in making this a memorable experience in magical Orlando. As an environmentally conscious organization, the Enclave Suites is an eco-friendly resort and participates in many 'Green Initiatives' and 'TravelLife's' Sustainable Tourism Program.

We encourage you to contact our Manager on Duty, or any member of our service team if there is anything we can do to make your stay more comfortable.

Enjoy your stay in magical Orlando!

Best regards,
Melissa Glenn
General Manager

THINK GREEN

Welcome to The Enclave Hotel & Suites

We are pleased to have you as our guest, and we will do everything to make your stay the best it can be! Use this service guide to take advantage of the services and amenities we offer. If there is anything else we can do to assist you, please let us know.

Guest Services - The Front Desk is available 24 hours a day to assist with any need you might have, and the **Universal Desk Representative is available from 8 a.m. to 11 a.m. 7 days a week**. They are located right inside the entrance to the lobby. To book your Universal Studios®, SeaWorld®, and Aquatica® shuttles, please see the Universal Representative in the morning. To book your **Walt Disney World®** Theme Parks shuttle and tickets, please see the front desk agent at least one hour in advance.

Dining Options

Breakfast - There are two options for breakfast: We offer a complimentary "Grab and Go" breakfast. You will be given a breakfast voucher at check-in to utilize each day of your stay for the complimentary breakfast. We also offer a full buffet breakfast for an additional charge. Breakfast is served from 7 a.m. to 10 a.m.

Lunch & Dinner - Our Pizza Hut Express and Food Court offer a variety of entrees served from 11 a.m. to 12 midnight. Room service is also available, and a menu is located inside the Enclave directory in your room. To order room service, dial extension 1000 from your room phone. We deliver!

Amenities

Recreation - We offer 2 outdoor pools and 1 indoor pool. The two outdoor pools are open from 8 a.m. to 10 p.m. and the indoor pool is open 24 hours. For those wanting some exercise on their vacation, we offer a fitness center that is open 24 hours. We also offer tennis and table tennis. Equipment can be borrowed from the front desk with a photo i.d. There is no additional charge for these amenities.

staySky Kids' Club - staySky Kids' Club offers a variety of scheduled events during your stay. Some of the events are free and some require a nominal fee. Please visit the front desk for a schedule of this week's events. Schedule is subject to change. staySky Kids' Club is not a day care service. Only a limited number of children may attend each event. Event entry is on a first-come, first-serve basis. Please arrive early *(Some programs are seasonal, weather permitting and subject to change at any time)*.

Gift Shop - Visit our Gift Shop located next to the Food Court. The Gift Shop is open from 7am - 11pm.

The Enclave HOTEL & SUITES ORLANDO, FLORIDA

Stay SKY HOTELS & RESORTS

Stay sky vacation clubs

PARKING PERMIT

PLACE THIS SIDE FACING WINDSHIELD

Check Out Date

Folio #

AS A REMINDER, DO NOT LEAVE VALUABLES IN YOUR VEHICLE.

Vehicle owner or driver acknowledges that management assumes **NO LIABILITY** for theft or damages to vehicles parked on premises.

Enclave Hotel & Suites
6165 Carrier Drive • Orlando, FL 32819
P (407) 351-1155 • F (407) 354-5679
R 1 (800) 457-0077 • www.EnclaveSuites.com
/EnclaveOrlando /EnclaveOrl

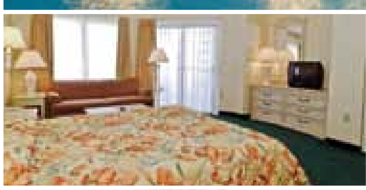
Trip Advisor Table Tents

Collateral

Rack Card

The Enclave HOTEL & SUITES ORLANDO, FLORIDA

International Drive, Orlando



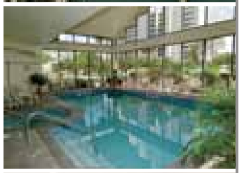
EnclaveSuites.com

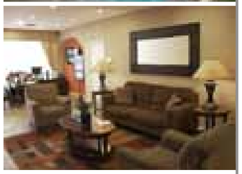
A Whole New Experience

The Enclave Hotel & Suites

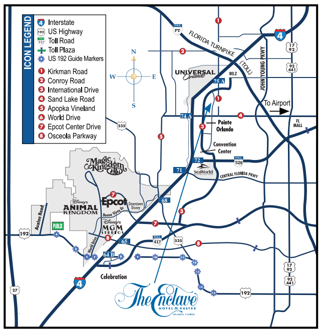
Reservations: 800-457-0077
Hotel Tel: 407-351-1155 • Hotel Fax: 407-354-5679
6165 Carrier Drive, Orlando, FL 32819

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 studios 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 balcony or terrace
- Two outdoor pools, two outdoor Jacuzzis, two outdoor children's pools
- One indoor, heated pool and Jacuzzi open 24 hours; fitness center
- Pizza Hut Express, convenience food café, sundry grocery shop
- Floodlit tennis court, children's playground, game room and staySky Kid's Club Activities (seasonally)
- Complimentary Grab & Go daily continental breakfast
- Complimentary transportation to Universal Studios®, SeaWorld, Wet 'n Wild, and local fee to **Walt Disney World**® Theme Parks-certain restrictions may apply
- Complimentary wireless Internet access



Sabre	Apollo/Galileo	Worldspan	Amadeus
30480	41194	MCOES	MCOENC

/EnclaveOrlando /EnclaveORL

Directions

From Orlando International Airport: 528 West to I-4 East to exit 74A. Right onto Sand Lake Road, left onto Canada Avenue. Enclave Hotel & Suites will be straight ahead.

From the West (Tampa, FL): I-4 East to Exit 74A. Right onto Sand Lake Road, left onto Canada Avenue. Enclave Hotel & Suites will be straight ahead.

From Downtown Orlando, Turnpike, or Daytona: I-4 West to Exit 75A Kirkman Road (left lane exit). Right onto International Drive. Left onto Universal Boulevard. Right onto Carrier Drive. The Enclave Hotel & Suites will be on the right.

Stay SKY® HOTELS & RESORTS

A Portfolio of Unique Hotels & Resorts
staySky.com

Collateral

Fact Sheets




The Enclave Suites

6165 Carrier Dr. Orlando, Florida 32819

The Enclave Suites

Located just off famous International Drive. The Enclave Suites Hotel & Suites offers exceptional amenities and value, making it one of Orlando's most popular full service resort hotels.

Hotel Highlights

- Deluxe Studio or Two Bedroom/Two Bathroom Suites with Fully Equipped Kitchens and Private Balcony
- 2 Outdoor Pools, 1 Indoor Pool, 2 Outdoor Kiddie Wading Pools, and 3 Jacuzzis - 2 Outdoor, 1 Indoor
- Fitness Room
- Pizza Hut Express, Convenience Food Court and Sundry Grocery Shop
- Floodlit Tennis Court, Children's Playgound and Game Room
- Sky Kids Club - Scheduled Children's Activities (Seasonal)
- Complimentary Daily "Express Grab & Go" Lite Continental Breakfast
- Complimentary Transportation to Universal Orlando, SeaWorld, Wet N' Wild. Local fee applies for Transport to **Walt Disney World®**
- Theme Parks
- Concierge
- Ice & Vending Machines
- Taxi Service Available
- Laundry Room - Self Service, Coin Operated
- Valet Dry Cleaning
- ATM Machine
- Business Center
- Complimentary Wireless Internet
- Lakefront Gazebo

Entertainment Options

Fast Food to Fine Dining - 1 block

Pirate's Dinner Adventure - 1 block

Prime Outlets - 2 miles

Florida Mall - 5.1 miles

Mall at Millenia - 4.2 miles

Nearby Attractions

- Wet N' Wild - 1 miles
- Universal Studios - 1.5 miles
- SeaWorld, Aquatica - 4.5 miles
- **Walt Disney World®** Theme Parks - 9.5 miles

Airports

15 miles from (MCO)
Orlando International Airport

35 miles from (SFB)
Sanford-Orlando International Airport

KEEP CALM AND STAY AT

The Enclave
HOTEL & SUITES