

Supporting Our Destination's Ongoing Recovery

The third quarter of 2020 continued our destination's slow, steady recovery from the economic fallout caused by COVID-19. After being closed four months, Disney's theme parks reopened at limited capacity in mid-July, joining Universal, SeaWorld and other attractions that had reopened in June. Buoyed by relatively strong holiday and weekend travel from regional drive markets — the target of Visit Orlando's marketing and publicity efforts — hotel occupancy and Tourist Development Tax continued their upward trajectories.

Working closely with Mayor Demings and Orange County's Economic Recovery Task Force, Visit Orlando played a key role in developing and promoting our region's popular, highly effective health campaign: Safer, Stronger, Together. Other successful initiatives were Off to Orlando, which encouraged Florida resident "state-cations" by showcasing open-air experiences, affordability and new safety measures, and our #LoveOrlando campaign, which used social content from our fan base to promote visitors' many positive experiences.

Visit Orlando's 15th annual Magical Dining kicked off to great fanfare in late August. This year's program included over 70 member restaurants and outdoor/takeout options, with donations benefitting local nonprofit Feed the Need Florida. For the first time, Magical Dining was extended through the end of October, allowing four more weeks of impactful support for Orlando's restaurant industry.

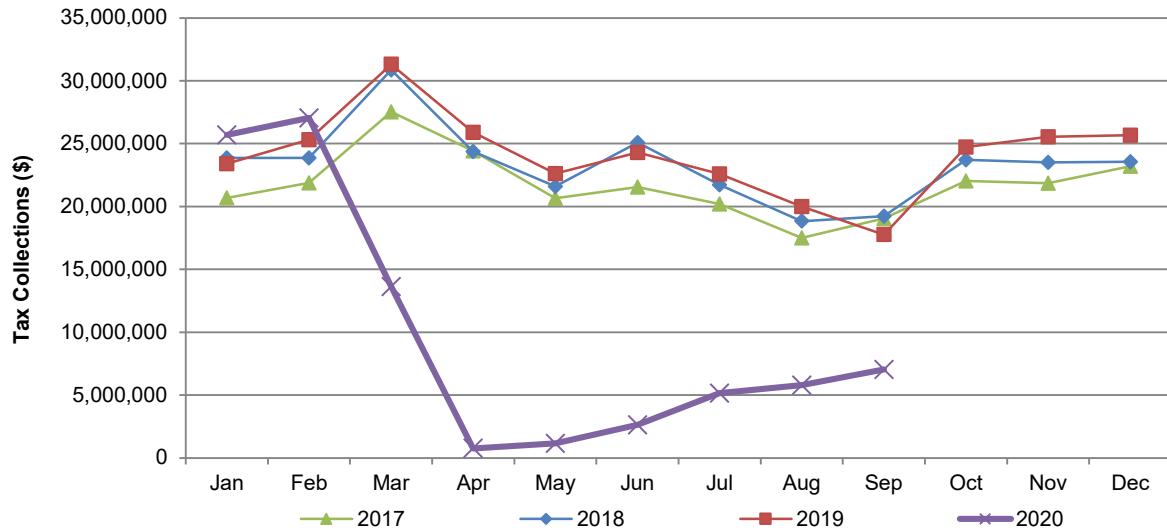
While leisure travel kept returning in gradual fashion, the Meetings & Conventions sector remained much harder hit. Still, July did see the return of safe, large-scale events at the Orange County Convention Center, which hosted the AAU Junior Volleyball Nationals and Together Again Expo. In addition, Visit Orlando and OCCC teamed up with Orlando Health on a groundbreaking partnership to provide convention groups with customized medical guidance, planning and support through 2020. On the sales side, future bookings secured by our sales team in the third quarter are projected to bring 135,000 attendees (citywide and in-house) and nearly \$300 million in economic impact; year to date, those numbers increase to 477,000 attendees and \$997 million in economic impact.

Finally, to keep our destination top of mind with those who sell Orlando vacations, we held virtual training sessions for thousands of travel professionals in key domestic and international markets. Our membership team also registered nearly 2,000 attendees across several webinars and member tutorials.

Looking ahead, we know our industry continues to face a long, challenging road, but we also know that the Orlando destination is resilient, and our community is working together toward incremental progress.

INDUSTRY PERFORMANCE

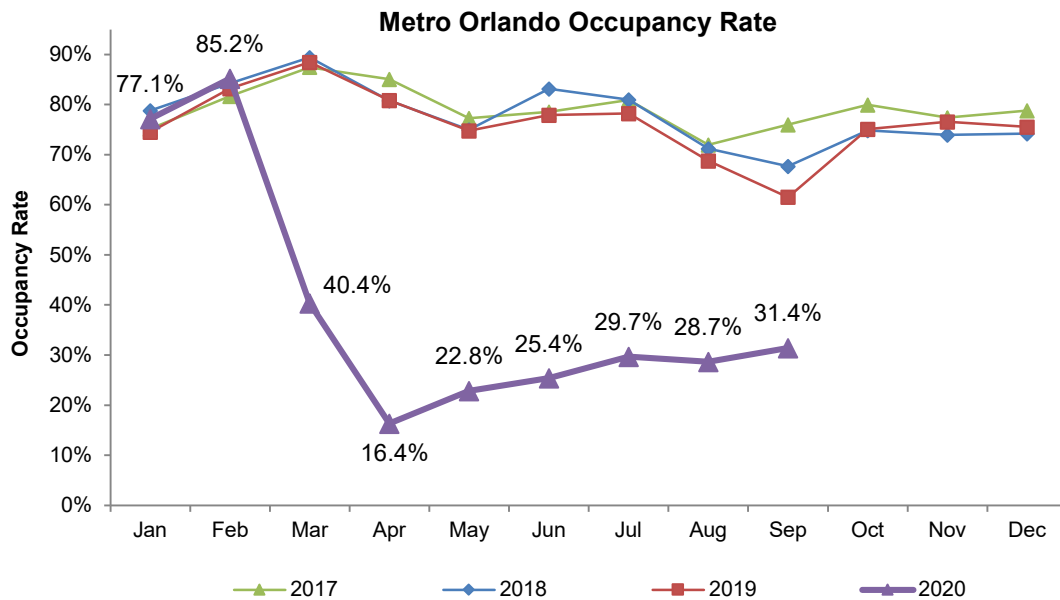
Orange County Tourist Development Tax Collections



Source: Orange County Comptroller's Office

Metro Orlando Lodging Indicators

The following data are based on the January through September results released by STR. Please note that STR information does not include Disney-owned and -operated hotels, nor does it include the short-term rental of alternative accommodations such as timeshares, condos and vacation homes.



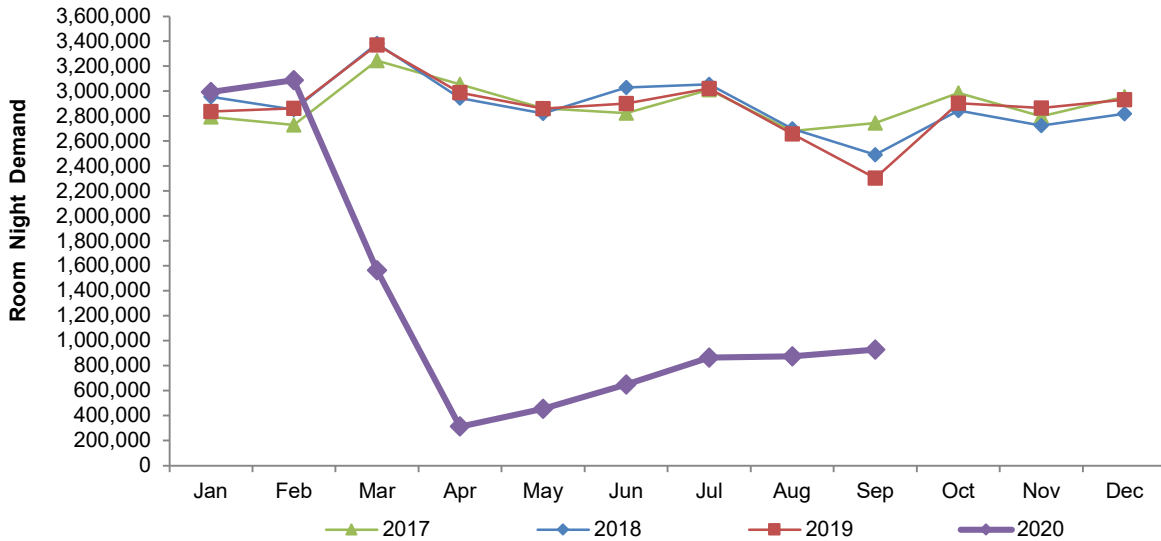
Occupancy

	Q3 2020	Year to Date
Orange County	29.7%	44.4%
Metro Orlando	29.9%	43.5%
National	48.0%	44.8%
Florida	42.7%	48.7%

Average Daily Rate

	Q3 2020	Year to Date
Orange County	\$90.58	\$124.51
Metro Orlando	\$85.71	\$115.56
National	\$101.13	\$106.22
Florida	\$110.70	\$138.87

Metro Orlando Room Night Demand



Room-Night Supply & Demand (in thousands)

	Q3 2020	Year to Date
Supply¹	8,923	26,764
Demand²	2,669	11,731

¹ Room-night supply: Computed each month by taking the number of hotel/motel rooms multiplied by number of days in the month

² Room-night demand: Computed each month by taking the room-night supply multiplied by occupancy rate

VISIT ORLANDO ACTIVITIES

GLOBAL MARKETING

United States Marketing Campaign

Our “Off to Orlando” Florida resident staycation campaign, launched in early July, helped drive summer visitation by promoting open-air experiences, affordability and new safety measures. The campaign showcased our destination’s unique resort pools, themed waterparks and outdoor adventures, complemented by numerous Florida-resident member offers. In July and August, “Off to Orlando” was promoted organically through Visit Orlando channels that included our website, blogs, social media and e-newsletters. In September, paid search and boosted social support were added to extend our reach. To date, the campaign has generated more than 3.5 million impressions and 140,000 engagements; in addition, visitation to the “Off to Orlando” landing page was 42% higher traffic than our site average.

Visit Orlando’s Magical Dining

Visit Orlando’s Magical Dining returned for its 15th year Aug. 28, offering three-course dinners for only \$35 at 78 area restaurants. To ensure consumer confidence, restaurants went above and beyond with new safety measures and takeout/delivery options, as well as open-air and outdoor dining. The program, originally slated to end Oct. 4, was extended to Oct. 31, allowing for a greater impact on local restaurants, their employees and this year’s charity, Feed the Need Florida. Many participating members reported sold-out reservation days and the best operating month (September) they’ve had all year.

Member participation fees covered all expenses for program marketing, including signage and paid media efforts. Member-provided meal certificates supplemented paid media efforts via content producers, influencers and an extensive radio promotion. Clear Channel Outdoor, along with Cox Media Group’s 98.9 WMMO, provided thousands of dollars in added-value media promotions. In addition, the Orlando Business Journal donated a print ad and Yelp partnered with us for a contest. Our partnership with OpenTable continued this year and included a Magical Dining reservation landing page, consumer emails and paid search. On VisitOrlando.com, 80% of search queries during September were related to Visit Orlando’s Magical Dining, making it our No. 1 driver of website traffic for that timeframe.

VisitOrlando.com

July – September	Q3 2020	Year to Date
Monthly sessions	1.4M	6.6M
Total page views	5.3M	15.5M

Content

Our content team provided strong support to various marketing initiatives, including blog posts on Visit Orlando's Magical Dining, fall visitation, destination value and shopping. Blogs were supplemented by 224 updated landing pages, 12 new landing pages and nine e-newsletters, including content for the consumer, meetings and trade teams.

Social Media

Social media efforts continued to focus on campaigns and messages to aid in recovery — safety, deals and rallying passion around our destination. To keep Orlando top of mind in a positive way, we launched a new campaign, **#LoveOrlando**, that leveraged the emotional connections people have with our destination. We leaned heavily on third-party content from our fan base, using their own photos, videos and comments to amplify the voices of trusted social ambassadors. Additionally, the campaign was supported by e-newsletters and outreach to local businesses to include #LoveOrlando in their social media channels and at their establishment. We also negotiated a promotion with Frontier Airlines that included a sweepstakes and fare sale. #LoveOrlando performed very well, outpacing previous social media campaigns, and will continue through the end of the year.

Social support for other initiatives included the region's **“Safer, Stronger, Together”** campaign, **“Off to Orlando”** and **Visit Orlando’s Magical Dining**, as well as weekly posts and dedicated Instagram stories to highlight deals for residents and restaurant offerings.

July - September	Q3 2020	Year to Date
Paid + organic Impressions (Facebook)	6.58M	206.5M
Visit Orlando blog (total page views)	131,227	1.4M

Convention Marketing

In collaboration with the sales team, convention marketing embarked on a retooled client communication strategy focused on owned and earned channels. Key messaging pillars included keeping Orlando top of mind as Cvent's No.1 overall U.S. meetings destination and reinforcing Orlando as a place where meetings can happen safely. Our monthly “Meetings Matter” e-newsletters were sent to over 30,000 subscribers, providing relevant and timely destination updates.

In conjunction with the Orange County Convention Center, multiple videos and blogs were produced to highlight successful face-to-face events happening safely in our destination. Additional touchpoints included OrlandoMeeting.com, customized delegate sites, blogs and dedicated social media channels. Transparent, constant communication with clients booked at OCCC continued to take place by providing assets such as video, copy, images and online resources.

GLOBAL COMMUNICATIONS (Media, Industry and Community)

Publicity/ Media

As co-chair of Orange County's regional branding campaign, "**Safer Stronger, Together**," Visit Orlando supported compliance among our member businesses and communicated nationally to media, consumers and the industry the extent of our region's commitment to safety.

These efforts helped generate more than 100 stories in the U.S. with positive messaging about Orlando's safety efforts — totaling 1.2 billion impressions and 7,755 social shares — such as this significant feature in Forbes, "[Orlando is back with big deals and big changes. Why you should go now.](#)" In addition, the team also worked with Orlando media to communicate local awareness, including an event unveiling a Lynx bus wrapped in safety messaging that resulted in 13 TV segments and stories in [MSN](#), [Orlando Sentinel](#), [The Daily City](#), [La Prensa](#) and [Florida Sun](#).

Also on the local front, publicity created strong awareness for **Visit Orlando's Magical Dining** through securing positive stories in media and with local foodie influencers. We executed a multi-pronged campaign, launching the program with stories spotlighting local chefs and menus, as well as real-life stories of how the program helps local businesses and residents, and then added a second wave announcing the program's extension due to its popularity. In total, we secured more than 185 stories promoting the program, including 77 TV segments, many featuring interviews showcasing local restaurants. Online and print coverage included local media such as the [Orlando Sentinel](#), [Orlando Date Night Guide](#), [Edible Orlando](#) and [Scott Joseph Orlando](#), as well as Florida-wide coverage in media such as [Yahoo News](#), [MSN](#) and [Bay News 9 Tampa](#). We also worked with the Mayor's Office to share the latest news on Magical Dining and its positive impact on local businesses, and we appreciate Mayor Demings bringing attention to participating restaurant owners during his weekly press conferences.

Leveraging the cost-effective and credible reach of national publicity stories, the PR team focused on securing coverage around Orlando vacation trends, and landed a host of notable stories such as work- and school-cations, in [The New York Times](#), [MSN](#) and [Travel + Leisure](#); weekend and grown-up getaways in [Forbes](#) and the [Atlanta Journal Constitution](#); and fall events in [The New York Times](#) and [Elite Daily](#).

We also collaborated with Frontier Airlines to develop a newsworthy national promotion that provided free flights to our destination for anyone with the name Orlando, pitching to U.S. media and distributing a press release on the national publicity newswire. The program was a success in generating positive news and commentary on an Orlando vacation, and generated almost 300 stories, including national outlets such as [Fox News](#), [MSN](#), [Yahoo News](#) and [Travel + Leisure](#). To date, the promotion has been featured in more than 200 broadcast and radio segments and syndicated in 30-plus regional newspapers.

We also ramped up efforts specifically reaching Florida residents, tied together with the “**Off to Orlando**” **campaign**. We expanded our outreach to both traditional media and social influencers throughout the state to secure positive stories on new safety measures, open-air experiences, Florida resident deals, and ideas for Orlando road trips. We launched a bi-weekly tip sheet to inspire new story ideas, generated numerous press releases on timely news angles, and secured to date more than 35 stories in Florida and national outlets. Stories ran in [MSN](#), [Yahoo](#), [WFTV](#), [WDBO](#) and [Palm Beach Illustrated](#), and we also received first-hand testimonials from social influencers such as [Amber Likes](#)’ “15 Florida Resident Deals You Can’t Miss.”

Meetings & Conventions Publicity

Our PR team led a media announcement on our collaboration with **Orlando Health** for the safe return of events to the Orange County Convention Center. The announcement resulted in strong coverage among meeting trade publications, including [Northstar](#), [Meetings Today](#), [Exhibitor](#), [TSNN](#) and [Convention South](#). The publicity team also worked closely with marketing and sales to conduct client meetings, communicating the status of our destination and supporting their needs for future events.

Industry Communications

Our communications team produced 14 e-newsletter and special messages to the industry and local community with destination updates, research and trends, resources for businesses and workers, and news from Orange County government press conferences. We also provided updates to key community stakeholders through presentations to Visit Orlando’s board of directors, Board of County Commissioners and Orange County’s Tourist Development Council.

Our primary social media platform for industry communications is Visit Orlando’s LinkedIn channel, where we share news on the work of Visit Orlando, destination updates, and messages of destination safety and progress. Our increased focus on enhancing this channel has resulted in a 31% growth this year, as we recently surpassed 20,000 followers and are now the second-largest LinkedIn account among peer destination organizations.

For Visit Orlando’s Magical Dining’s local charitable impact, we led the selection process and committee for this year’s charity recipient, awarding the honor to [Feed the Need Florida](#), a new, Orlando-based initiative helping people struggling to access food during the COVID-19 crisis. Since its launch in late March, Feed the Need has served more than 1.5 million meals, and funds raised through Magical Dining will help feed thousands more.

MEMBER RELATIONS

Our membership team continued to focus on delivering relevant educational opportunities and business promotional opportunities, hosting nearly 2,000 virtual attendees across a series of webinars and 10-minute tutorials. We leveraged our internal staff to deliver the tutorials, and our network of professional industry leaders — from organizations such as BakerHostetler, Yelp and the Greater Orlando Aviation Authority — helped inform, inspire and guide members through these unprecedented times. Year to date, our webinars have featured 6,000 attendees.

In the third quarter, we made more than 3,000 contacts with members, a 71% increase over the same period last year. We worked with members to collect offers for programs such as Orlando deals, member-to-member offers, the Florida resident program and more. For our restaurants, Visit Orlando’s Magical Dining launched with 70+ participants and, in an unprecedented decision, the program was extended through October, with 100% of restaurants supporting the move. Looking ahead, the team is working on a new member portal that will launch early 2021. The upgraded platform will greatly enhance the member experience and make it easier to access benefits, most notably the leads system and research reports.

CONVENTION SALES & MARKETING

Visit Orlando secures two types of meetings and convention business: at the Orange County Convention Center (aka “citywide”) and at Orange County hotels (aka “in-house”).

M&C Sales Performance

- **Citywide:** Our sales team secured future meetings and conventions with an estimated 83,596 attendees for the Orange County Convention Center, which will generate over \$214 million in economic impact.
- **In-House:** Our sales team secured future meetings and conventions with an estimated 52,005 attendees for Orange County hotels, which will generate over \$80 million in economic impact.

Citywide Production

July - September	Q3 2020	Year to Date
Future attendance ¹ secured	83,596	261,349
Estimated room nights ²	183,911	574,968

¹ Future attendance based on number of delegates at a meeting or convention’s most recent event.

² Estimated room nights = attendance multiplied by average length of stay (2.2 nights)

In-House Production

July - September	Q3 2020	Year to Date
Future attendance secured	52,005	216,215
Hotel room nights	108,477	474,953
Hotel leads	147	1,113

Citywide Sales Key Bookings

Key bookings at the Orange County Convention Center in the third quarter include:

- Ace Hardware: 15,000 attendees, September 2021
- Samaritan's Purse: 10,000 attendees, March 2023
- American Association of Pharmaceutical Scientists: 9,500 attendees, October 2023
- American Society of Safety Professionals: 8,000 attendees, July 2025
- All Star Challenge Cheer and Dance National Championship: 6,500 attendees, March 2021
- Florida State Junior Thespians: 6,000 attendees, January 2022

Hotel Key Bookings

Key in-house hotel bookings in the third quarter include:

- eClinicalWorks: 5,000 attendees, October 2022
- Fellowship of Christian Athletes: 3,000 attendees, February 2023
- Pawpet Live Experiences / Florida United Furry Fandom: 3,000 attendees, August 2022
- Ameriprise Financial: 2,800 attendees, May 2023
- Association of Women's Health Obstetric & Neonatal Nurses: 2,500 attendees, June 2025
- Professional Liability Underwriting Society: 2,000 attendees. November 2025
- Association of Public and Land-Grant Universities: 2,000 attendees, November 2024
- Country Financial: 1,800 attendees, February 2021
- Disability:IN: 1,800 attendees, July 2023

Destination Meeting Services

The destination services team conducted two client planning site visits in the third quarter.

July - September	Q3 2020	Year to Date
Service Leads Issued ¹	27	256

¹ Lead is where the client has asked us to submit their information to our members. It is then up to the member to respond with their proposal directly to the client.

TRAVEL INDUSTRY SALES

In August, Visit Orlando and members launched a new webinar series in Latin America, reaching thousands of travel professionals across Brazil, Mexico, Colombia and Argentina. The series provided a

platform for key stakeholders to connect with leisure sales professionals, showcasing their products and providing up-to-date information on safety and recovery plans. In September, our webinar with Galaxy Vacations drew more than 375 travel advisers, tour operators and partners. The event was co-hosted by Universal Parks & Resorts, SeaWorld Parks & Entertainment, and the Mall at Millenia.

We also participated in a virtual tradeshow, “An All-American Roadshow,” that reached over 2,000 travel advisers and provided an opportunity to share on-demand content and hold one-on-one virtual meetings. Additional webinars with CVC, Agaxtur and Hoteldo (Brazil), and Travel Impressions, Dream Destinations and Best Day (Mexico) reached hundreds of travel advisors in Latin America. Domestically, our team participated in a multimedia webinar with AAA to showcase our destination to more than 250 agents.

July - September	Q3 2020	Year to Date
Travel professionals trained (in-person and online)	6,579	17,755
Travel professional sales calls	198	828
Travel professional events (tradeshows, missions, destination orientations)	4	13