

Organizational HIGHLIGHTS

VisitOrlando

Q1 2021

Recovery is Visit Orlando's No. 1 priority — a goal supported by every initiative we embark upon — and strengthening partnerships will play a key role in our success. Every day, I discover even more about the people, places and businesses that make our destination great, and I am excited about what the future holds.

Indeed, one year after the pandemic, we're definitely on the road to recovery, with progress across all sectors of Orlando's tourism industry:

- Hotel occupancy rates ended the first quarter at their highest levels since last March, driving gains in Tourist Development Tax and average daily room rate.
- The leisure and hospitality sector added 11,900 jobs in February and March, accounting for 64% of the region's total job growth during that time.
- Domestic air travel picked up considerably, fueled by pent-up demand, increased savings rates among consumers and a strong spring break season.
- Orlando continued to lead the way in the return of safe in-person meetings, hosting 18 first-quarter citywide events at the Orange County Convention Center, with 70 more on the books through the end of the year.

At Visit Orlando, we contributed to this momentum through several efforts to drive leisure and business travel. With safety the most critical factor for consumers in deciding when and where to vacation, we worked with prominent national media outlets and social influencers to highlight our destination's health and safety measures, and what it's like to vacation here in this new era. Our first multistate marketing campaign since COVID-19, "The Wonder Remains," launched in January and generated an estimated \$35 million in visitor spending. Our first-ever virtual travel show, "The Wonder Awaits You!" drew over 11,000 registered participants dreaming of an Orlando vacation.

In the area of meetings and conventions, our sales team secured future bookings with the potential to bring over 358,000 attendees (citywide and in-house) and \$828 million in economic impact. Our "Orlando Awaits You!" virtual summit drew nearly 750 meeting and convention planners, and our "Leading the Way Back to In-Person Meetings" was a collaborative success with a diverse set of industry partners.

Looking ahead, as vaccination efforts gain steam and readiness to travel continues to rise, we believe more positive developments await in the second quarter and beyond.

Cassandra Matej
President & CEO

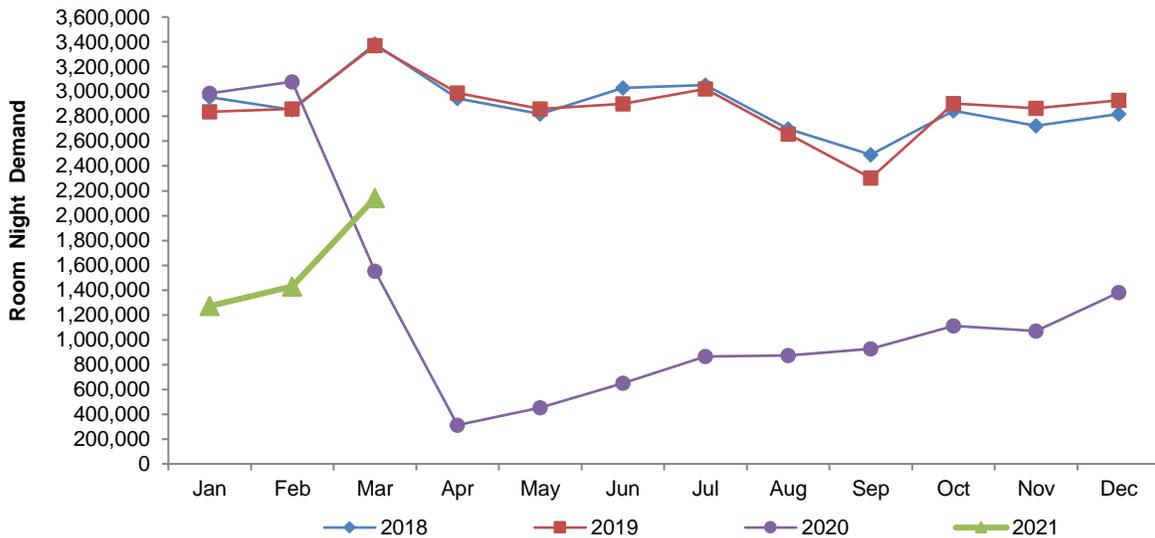
Occupancy

	Q1 2021	Year to Date
Orange County	46.1%	46.1%
Metro Orlando	45.4%	45.4%
National	46.5%	46.5%
Florida	59.5%	59.5%

Average Daily Rate

	Q1 2021	Year to Date
Orange County	\$103.57	\$103.57
Metro Orlando	\$99.27	\$99.27
National	\$99.35	\$99.35
Florida	\$151.38	\$151.38

Metro Orlando Room Night Demand



Metro Orlando Room-Night Supply & Demand (in thousands)

	Q1 2021	Year to Date
Supply ¹	10,591	10,591
Demand ²	4,844	4,844

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

New Websites

As part of a redesign, VisitOrlando.com and our affiliated websites transitioned to a new platform with more intuitive functionality and updated navigation features. The new platform provides greater flexibility for the team to make updates and a more robust experience for consumers. In the process, content and images were refreshed and health safety information was added throughout. Visit Orlando offers consumer websites in English, Spanish and Portuguese, as well as country-specific sites for the United Kingdom, Ireland, Canada and Brazil. We also have industry-specific sites designed for meetings and conventions and Visit Orlando members.

United States Marketing Campaign

In January, Visit Orlando launched “The Wonder Remains,” our first multistate marketing campaign since the pandemic. Our objective was two-fold: Stimulate immediate demand (spring/summer) from active travelers and inspire those dreaming about traveling to choose Orlando when the time is right.

With road trips continuing to be Americans’ primary travel choice, the campaign targeted new regional markets in North Carolina, Tennessee and Texas, along with Orlando’s top markets of Atlanta and major Florida cities. Ads focused on finding comfort in the joyful, adventurous place that Orlando has always been — a place where safety comes first and new memories await. Messaging will continue to promote Orlando’s outdoor adventures, affordability (great member deals) and destination-wide safety measures.

Campaign summary:

- Run dates: Jan. 4-March 28, 2021
- Target markets:
 - TV: Atlanta, Nashville, Charlotte, Raleigh-Durham
 - Digital/social: Southeast U.S. + Texas, based on audience and travel intent signals
 - Paid search: East of the Mississippi + Texas, based on search intent signals
- Target audience: Families and adults
- Media channels: TV/CTV (broadcast/linear + streaming), digital display, paid social and paid search (SEM)

“The Wonder Remains” has performed very well, with travel interest surpassing pre-pandemic levels in January/February and hotel/air bookings aligning with our target media markets, contributing to post-pandemic record occupancy for February/March. In the first quarter, the campaign delivered over 281

million impressions and 1.3 million website visits, with \$35 million in anticipated visitor spending directly attributable to our ads.

First-Ever Orlando Virtual Travel Show

Complementing our marketing campaign, we teamed up with 45 members to invite consumers to our destination's first-ever virtual travel show March 25. With the goal of providing a "one-stop shop" for vacation planning, "The Wonder Awaits You!" immersed over 11,000 registered participants in our famous theme parks, attractions, outdoor adventures, accommodations, dining, arts & culture scene, and much more. This fun, interactive experience — hosted live by local millennial mom, former TV personality and digital talk show host Sonni Abatta — encouraged consumers to play, learn and save by watching our members' informative videos, learning safety procedures and downloading special offers. We also awarded vacation/flight packages from Walt Disney World, SeaWorld Orlando, Universal Orlando Resort and Spirit Airlines.

The consumer survey results are very positive and demonstrate the effectiveness of the show:

- 70% rated the show excellent/very good.
- 89% learned something new.
- 81% would attend a similar show in the future.
- 52% more likely to visit Orlando after attending the show.

Media

Advertising Campaigns	Impressions	Description
<i>Wonder Remains</i> Q1-Spring	281,000,000	TV (linear + streaming), digital display, paid social and paid search

VisitOrlando.com

January – March	Q1 2021	Year to Date
Monthly sessions	2,540,932	2,540,932
Total page views	5,139,787	5,139,787

E-newsletters

Market	Delivered	Open Rate	Click Through Rate	Click to Open Rate*
United States consumer^	8,269,844	7.6%	0.4%	5.7%
Florida consumer	1,733,082	10.2%	0.5%	4.9%
International consumer	582,697	10.2%	0.8%	7.7%

*CTOR indicates how effective the email design and content performed by measuring if the recipient took an action by clicking on any hyperlink within the email. CTOR is calculated by the number of clicks out of the number of email opens.

^Florida data not included in U.S. All data includes deployments to engaged and unengaged audiences.

Content

Our editorial content team provided strong support to marketing initiatives, including a spotlight on what's new and upcoming in 2021; increased flight availability; late winter/early spring events; and the destination's latest successful conventions. Blogs were supplemented by seven new landing pages, 71 updated landing pages, 19 e-newsletters and 26 miscellaneous requests, including content for the consumer, meetings and trade teams.

Social Media

Our social media efforts focused on increasing engagement across all platforms, with examples including our Super Bowl social blitz, more Instagram stories and greater content interactions with member brands. Having consistent paid social media running in the first quarter also boosted metrics, with an increase in impressions and followers as the content was shared with a wider audience.

January - March	Q1 2021	Year to Date
Paid + organic Impressions (Facebook)	106,576,517	106,576,517
Visit Orlando blog (total page views):	390,007	390,007
Visit Orlando followers (Facebook, Twitter, Instagram, YouTube)	Secured 6,191 new followers	1,989,758 total followers

Convention Marketing Update

In collaboration with the sales team, convention marketing continued its messaging efforts on Visit Orlando's owned channels. Print and digital advertising was placed in meetings-specific outlets, highlighting the protocols our destination takes to ensure face-to-face meetings can happen safely and successfully, as well as keeping Orlando top of mind as Cvent's No. 1 overall U.S. meetings destination.

Sales support continued to be a key area of focus: The convention marketing team assisted with creative assets for our "Orlando Awaits You!" virtual summit Jan. 26-28, several presentations and business proposals were created for large industry events, and the Meetings Insider monthly e-newsletter was distributed to over 25,000 subscribers.

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

GLOBAL COMMUNICATIONS (Media, Industry and Community)

Publicity / Media (National and local)

Our PR team kicked off the new year by continuing to leverage the highly credible reach of third-party sources who endorsed our destination's safety measures. As part of these efforts, we hosted 13 social media influencers in the first quarter from regional drive markets, who posted to their followers their positive experiences with Orlando's safety measures and open-air attractions. On a national scale, we

worked with [USA Today](#) for a story that noted *“Orlando’s safety protocols to ‘raise the bar on safety’ have reassured visitors that it’s doing everything it can to maintain a safe and clean environment for tourism.”*

In addition, we secured a host of notable national stories on reasons to visit Orlando, including a story on new attractions coming this year on [MSN.com](#); stories promoting spring break travel here that ran in [Travel + Leisure](#), [Business Insider](#), [Newsweek](#), [MSN](#), [NBC News](#) and [The Points Guy](#); and syndicated coverage of the feature story [“Taking the kids to Orlando this spring — safely”](#) that was picked up in more than 10 regional newspapers.

Upon launching Visit Orlando’s multimillion-dollar marketing campaign, we published news releases and conducted virtual interviews with local and national media. Through these efforts, we secured **60** local stories — including [WESH Channel 2](#), [WKMG Local 6](#) and [WFTV Channel 9](#) — on the importance of the campaign for local economic recovery and nearly **200** national/out-of-market stories promoting Orlando as a vacation destination — including a syndicated piece in the [Associated Press](#) that ran in [U.S. News & World Report](#) and [USA Today](#).

Building on our efforts to underscore the importance of tourism in driving community recovery, we also offered insights timed to coincide with Orange County’s monthly TDT collection announcements, as well as industry insights related to the one-year anniversary of COVID’s impact on our destination. As part of this recognition, we worked with the Orlando Sentinel to place our first guest column from a Visit Orlando CEO, sharing insights on how our industry has adapted, evolved and begun to recover, as well as its critical impact and potential to lift our entire community’s recovery.

Overall, due to our increased efforts, we secured 186 local media stories in our local region, underscoring the importance of the industry and Visit Orlando’s activities to help restore visitation — nearly double our output from the first quarter of 2020.

Local Stakeholder Communications - Community, Legislative, Industry

We produced biweekly e-newsletters to the industry and local community leaders, sharing news, research and trends, as well as recaps from Orange County government press conferences and organizational updates.

Information was regularly shared on Visit Orlando’s activities, and updates on industry performance, through presentations and speaking engagements with key stakeholders in the community and industry, including Orange County’s Tourist Development Council, Visit Orlando’s board of directors, the PCMA Southeast Chapter and Expedia Group’s annual Orlando Partner Forum.

We also supported Casandra Matej, our new president & CEO, in establishing a host of 1-on-1 meetings across the region with business leaders, member companies, partner organizations, elected officials and area residents. These efforts will be expanded upon in the second quarter and beyond.

Meetings & Conventions Publicity

For meetings and conventions trade publications, we secured media attendance for our Jan. 26-28 virtual summit that resulted in positive coverage in [Prevue](#) and [Smart Meetings](#). We also continued to highlight safety precautions and recovery status, including landing a [Northstar](#) article that noted *“Orlando, in particular, has been among the destinations leading the industry’s recovery.”*

MEMBER RELATIONS

The 2021 membership renewal process continued with a 20% discount off 2020 rates, resulting in dues collections that are 96% to goal. Fourteen new members joined us in the first quarter.

The membership team began the year focused on delivering relevant training and educational opportunities such as the popular webinar “Leading the Way Back to In-Person Meetings,” which was a partnership between Visit Orlando, Surf Expo, Orlando Health and the Orange County Convention Center. The team also held two new-member orientations and four 10-minute tutorials on topics like LinkedIn tips & tricks and feedback models; launched and recorded four Sip & Sees (virtual walking tours to introduce new members or highlight recent renovations); and hosted a virtual training session for members to prepare for our March 25 virtual consumer travel show.

For the first quarter, 759 participants attended member events/programs.

In other highlights: The Member Connect portal launched, offering an upgraded platform to enhance the member experience and make it easier to access benefits, most notably the leads system and research reports. A training session was delivered to members, and an additional focused event was held specifically for hotel members. In preparation for Visit Orlando’s Magical Dining, we also coordinated multiple restaurant focus groups to gauge proposed 2021 program changes.

Interactions with members were focused primarily on membership renewal; support with the new Member Connect portal and accessing leads; outreach to encourage participation in our numerous consumer-offer programs (Orlando deals, member-to-member offers, the Florida resident program, etc.); and the virtual consumer travel show.

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:** The sales team secured future meetings and conventions with an estimated 279,701 attendees for the Orange County Convention Center, which will generate over \$714 million in economic impact.
- **In-House:** The sales team secured future meetings and conventions with an estimated 78,771 attendees for Orange County hotels, which will generate over \$114 million in economic impact.

Citywide Production

January – March	Q1 2021	Year to Date
Future attendance ¹ secured	279,701	279,701
Estimated room nights ²	194,882	194,882

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

January – March	Q1 2021	Year to Date
Future attendance secured	78,771	78,771
Hotel room nights	147,256	147,256
Hotel leads	592	592

Citywide Sales Key Bookings

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

- Healthcare Information & Management Systems Society (HIMSS): 40,000 attendees, March 2022
- Annual Coverings Tradeshow: 27,000 attendees, July 2021
- International Church of Christ World Discipleship: 26,000 attendees, July/August 2022
- National Baptist Convention USA: 25,000 attendees, September 2021
- Ohio Basketball National Championship: 21,000 attendees, July 2021

Hotel Key Bookings

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

- Church of God of Prophecy International: 7,440 total room nights, July 2028
- Technology Student Association: 6,859 total room nights, June 2027
- Additive Manufacturing Users Group: 6,750 total room nights, May 2021
- Association of Latino Professionals in Finance & Accounting: 6,230 total room nights per year, August 2022 and 2024
- Achieving the Dream: 5,980 total room nights, February 2024

Direct Sales Activities

Activity	Total Number	Total Participants
Tradeshows	2	2,167
Missions	0	0
Client Events	1	514
Site Visits	4	11

Destination Meeting Services

January – March	Q1 2021	Year to Date
Service Leads Issued ¹	61	61
Planning Site Visits	7	7

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

When Expedia unveiled a Travel Agent Affiliate Program (TAAP) — which allows agents in the U.S. to access global inventory and earn commissions on hotels, packages and activities — our travel industry sales team partnered with Expedia TAAP to educate over 350 industry professionals about selling our destination. We also participated in a webinar with Pleasant Holidays to educate over 150 travel advisers about package sales to Orlando and teamed up in virtual tradeshow with Cruise Planners, whose 4,000-plus agents sell travel packages to destinations worldwide.

In Latin America, we partnered with Disney to deliver destination updates and booking tips to over 600 travel professionals, agency owners, franchisees and sales agents. In the U.K., sales calls with key clients will help ensure Orlando remains top of mind in that key overseas market as travel recovery advances. Our team is working with Aer Lingus on reciprocal sales/marketing initiatives to support the new Manchester-to-Orlando direct route, and AeroMexico and Viva Air are also a key focus to support new and existing routes from Mexico and Colombia.

Further team efforts revolved around the production of an on-demand miniseries that will launch in Q2; the series will feature member videos on accommodations, attractions and outdoor adventure.

January – March	Q1 2021	Year to Date
Travel professionals trained (in-person and online)	1,534	1,534
Travel professional sales calls	126	126
Travel professional events (tradeshow, missions, destination orientations)	1	1

Visit Orlando
Results of Operations
For the Three Months Ending March 31, 2021

	<u>First Quarter</u>	<u>Year-to-Date</u>
Revenues		
Tourist Development Tax	8,006,615	8,006,615
Expenses		
Domestic Marketing	3,526,910	3,526,910
Convention Sales	1,118,766	1,118,766
Visitor Services	73,426	73,426
Public Relations	314,626	314,626
Destination Meeting Services	233,009	233,009
Market Research and Insights	125,800	125,800
Administration	1,165,843	1,165,843
Total Expenditures	<u>6,558,380</u>	<u>6,558,380</u>