

## Leveraging Our Strengths in Times of Adversity

In this final report for 2020, we thank our many community leaders and member companies who joined together in helping Orlando's tourism industry navigate such a difficult, uncertain year. Together, we accomplished much in the face of adversity, leveraging the strengths of our destination — innovation, collaboration and resiliency — to position us for better days ahead.

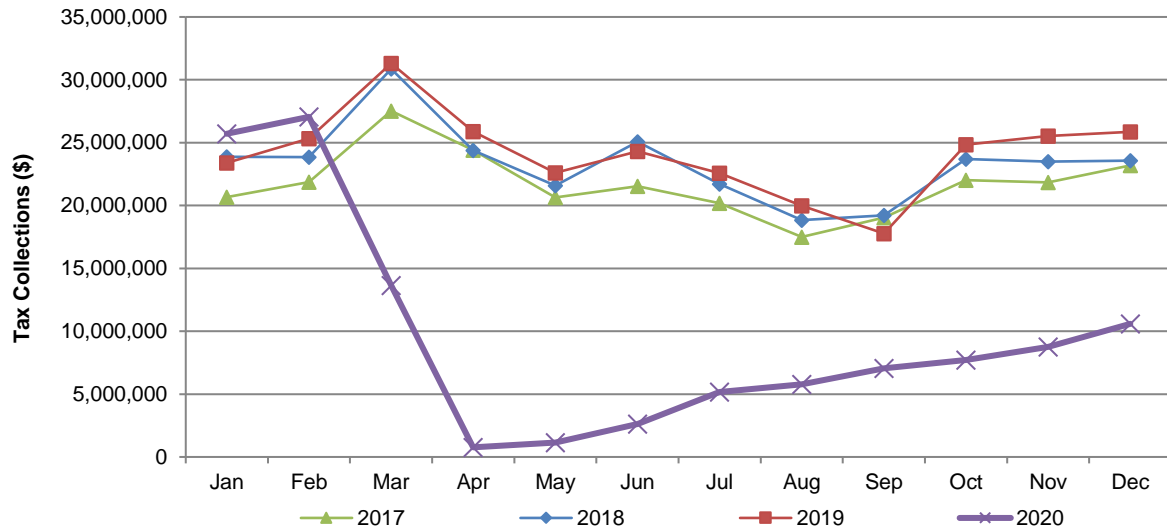
Fourth-quarter highlights (October-December) include:

- Media and community announcement of our new president and CEO, Casandra Matej, who brings to our organization over two decades of industry leadership, most recently as president and CEO of Visit San Antonio.
- Due to strong consumer demand and positive impact on 78 participating restaurants, we extended this year's Visit Orlando Magical Dining program by an extra four weeks through October, making it our longest in history. We are thrilled that, despite the challenges of a pandemic, with the changes we made to encourage outdoor dining and delivery options, the event raised a record \$345,378 to help local residents through Feed the Need Florida.
- Off to Orlando, our in-state marketing campaign, exceeded its goals and was extended through Dec. 20, while our holiday-focused deals campaign was Google's No. 1 organic search result for "Black Friday Orlando."
- In partnership with the Orange County Convention Center, we produced several videos and blogs detailing how Orlando is leading the way for the return of safe meetings. Destination-wide safety messaging continued to be a focus of our leisure marketing and publicity efforts, as well.
- Across our organization, we continued to host innovative, attention-grabbing virtual events to showcase Orlando to media and clients — including our first-ever Virtual Press Trip, a three-day SuperFAM for travel advisers, and our annual membership luncheon. For the year, nearly 8,000 people attended our virtual and in-person events.
- For the first time since March, our publicity team welcomed back media and social influencers to our destination for in-person visits.
- Our convention sales team secured future bookings projected to bring 147,000 attendees (citywide and in-house) and \$344 million in economic impact.

Going forward, our industry's long rebound will likely be marked by slow, incremental progress for at least the first half of 2021. However, the potential for widespread vaccine distribution stands to accelerate momentum by year's end — and as more people feel safe to travel, our marketing campaigns will help ensure Orlando is the top-of-mind choice.

## INDUSTRY PERFORMANCE

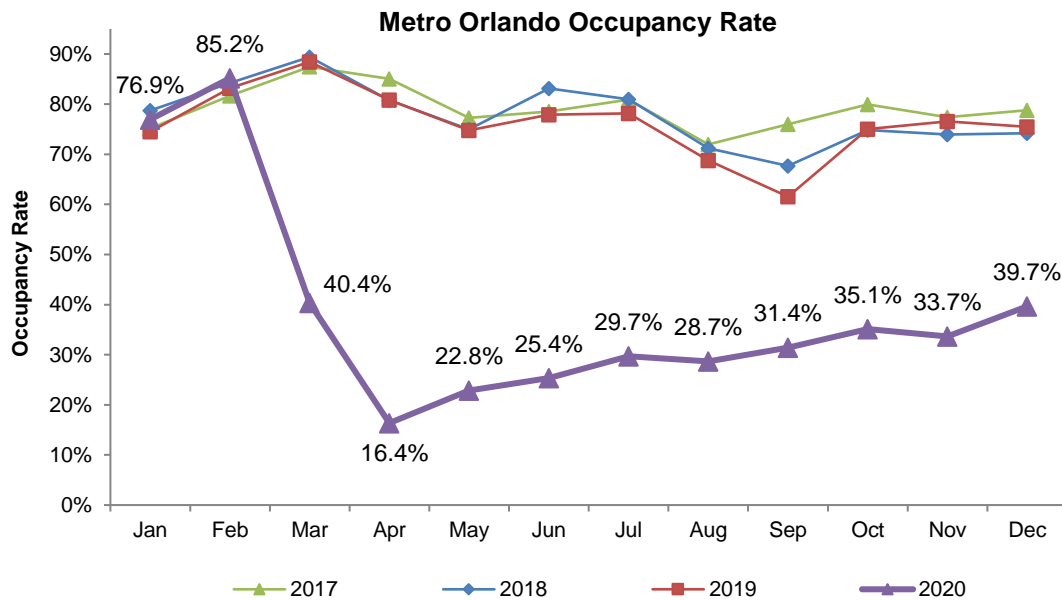
### Orange County Tourist Development Tax Collections



Source: Orange County Comptroller's Office

### Metro Orlando Lodging Indicators

The following data are based on the January through December 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.



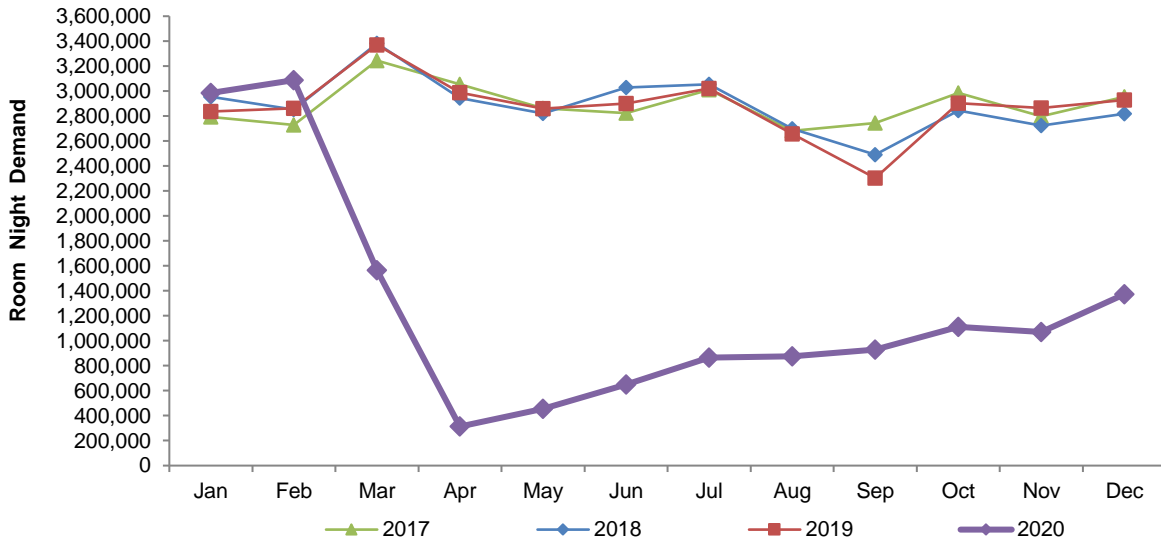
### Occupancy

	Q4 2020	Year to Date
Orange County	36.8%	42.3%
Metro Orlando	36.2%	41.5%
National	41.8%	44.0%
Florida	45.6%	47.9%

### Average Daily Rate

	Q4 2020	Year to Date
Orange County	\$94.25	\$117.14
Metro Orlando	\$91.12	\$109.74
National	\$93.84	\$103.25
Florida	\$114.35	\$132.67

### Metro Orlando Room Night Demand



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

	Q4 2020	Year to Date
Supply <sup>1</sup>	9,811	36,575
Demand <sup>2</sup>	3,556	15,280

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

<sup>2</sup> 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” staycation campaign continued to drive fall/holiday visitation from Florida residents, promoting outdoor experiences, extraordinary resorts, member offers and continual safety measures. The campaign was supported in paid media with search, boosted and paid social, digital display and digital outdoor in Tampa and Miami. It was extended through Dec. 20 to entice last-minute holiday travel.

Delivering 177 million impressions and 1.4 million website visits, the campaign exceeded our goals. It resulted in nearly 495,000 hotel/air searches for Orlando, generated almost \$19.4 million in visitor spending from September through December, and spurred strong in-state website visitation that often surpassed prior-year levels.

#### Visit Orlando’s Magical Dining

The 15<sup>th</sup> anniversary of Visit Orlando’s Magical Dining was a huge success, starting Aug. 28 and being extended through Oct. 31 — a record duration due to high demand and the program providing a much-needed economic boost for participating restaurants. Media partners Clear Channel Outdoor and Cox Media Group each provided over \$25,000 in additional media value. Some top performance metrics included:

- 5.1 million pageviews to OrlandoMagicalDining.com
- Over 1.1 million social impressions
- Over 50,000 social engagements
- Targeted email open rates over 20%

#### Media

Advertising Campaigns	Impressions	Description
Florida In-State Campaign	177,930,182	Paid search, paid social, digital display, and digital OOH

#### Global Website – VisitOrlando.com

October - December	Q4 2020	2020 Total (Year to Date)
Monthly sessions	2,032,293	9,376,476
<b>Total page views</b>	<b>4,587,170</b>	<b>23,057,109</b>

## Direct Marketing

E-newsletters

Market	Delivered	Open Rate	Click Through Rate
United States consumer	6,394,706	7.1%	0.3%
Florida consumer	1,418,862	11.8%	0.7%
International consumer	263,683	11.7%	0.9%

\*Florida data not included in United States. All data includes deployments to engaged and unengaged audiences.

## Social Media and Content Creation

Visit Orlando continued to support and promote key social campaigns like #LoveOrlando and #OfftoOrlando, generating a high number of impressions and engagement. During the holidays (Halloween, Thanksgiving, Christmas and New Year's), we leveraged social media takeovers and partnerships with content creators to gain third-party credibility in telling the story of our destination's safety measures and outdoor activities.

Our content team provided strong support to marketing initiatives, including holiday visitation (four blogs), meeting hotels (two blogs), promoting Orlando as a healthy travel destination (one blog) and Black Friday (one blog), the latter of which was the No. 1 organic Google search result for "Black Friday Orlando" and related terms. Blogs were supplemented by two new landing pages, 59 updated landing pages, 10 e-newsletters and six miscellaneous requests, including content for the consumer, meetings and trade teams.

October - November	Q4 2020	Year to Date
<b>Impressions Paid + Organic Impressions</b> (Facebook)	79,318,019	350,537,994
<b>Visit Orlando Blog</b> (Total Page Views)	253,128	1,640,342
<b>Visit Orlando Followers</b> (Facebook, Twitter, Instagram)	Lost 468 followers	1,978,611 total followers

## Convention Marketing

In collaboration with the sales team, convention marketing continued with complementary messaging in our owned channels. 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. The

monthly e-newsletter “Meeting Insider“ was distributed to over 25,000 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 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**

To connect with national media in a more personal way, provide first-hand information of new destination safety measures and inspire future travel for reporters, Visit Orlando’s publicity team hosted its first-ever Virtual Press Trip. The interactive experience allowed the media to connect with our destination through theme park tours, live cooking demos and unboxing items that represented each stop along the virtual itinerary. The 18 journalists who attended represented a variety of national U.S. media outlets, including The New York Times, Parents Magazine, Forbes, USA Today, Boston Globe and Conde Nast Traveler. The interactive presentation incorporated our region’s new safety measures, attractions, hotels and outdoor experiences. Reception and results were very positive, with the New York Times reporter calling it *“the best virtual event I’ve attended all year.”*

Leveraging the highly credible reach of third-party media sources, the PR team focused on securing national coverage endorsing the destination’s safety measures. Just a few of the resulting 135 stories that were secured in 2020 included a Boston Globe article quoting Orange County’s Dr. Raul Pino, [How to have a great \(and safe\) time in Florida if you’re considering a trip this winter](#); a Fodor’s story, [How to Be Safe at Disney World and Universal Studios Orlando During the COVID Pandemic](#); and a Travel + Leisure story on [The 50 Best Places to Travel in 2021](#). Visitors can *“feel safe knowing Orlando was one of the first cities to develop a citywide health and safety program,”* Travel + Leisure reported.

In addition to safety, the team secured a host of notable national stories on reasons to visit Orlando, including Black Friday deal coverage in [The New York Times](#), [NBC News](#), [MSN](#) and [Forbes](#); and holiday travel stories in [Travel + Leisure](#) and [Parents](#). Many of these national travel stories resulted from the efforts of the Virtual Press Trip.

In conjunction with the “Off to Orlando” marketing campaign, we continued our targeted efforts to reach Florida residents by welcoming back media and social influencers for in-person experiences in our destination. The team hosted 15 media and influencers in the fourth quarter, resulting in stories and social media posts on new safety measures, open-air experiences, Florida resident deals and ideas for Orlando

road trips. Results included a [Tampa Bay Parenting](#) story that said, "From the contactless check-in, enhanced cleaning and the increased safety measures in our hotel and in the attractions we visited, we felt extremely safe and had a great weekend getaway to Orlando." A [Macaroni Kid Naples](#) story focused on school-cations, and a variety of positive social media posts were generated from Florida-based influencers we hosted, including [@BelowtheSameSun](#) and [@MrsBlinks](#).

## LOCAL COMMUNITY

We also continued a dedicated focus on serving the local community as the voice of the industry, through news interviews, research insights and community engagement programs. In total, the team secured more than 600 stories in local news media in 2020, with messages including our tourism outlook, Visit Orlando's Magical Dining, Orlando to Go and the Safer, Stronger, Together campaign.

Some of our local media programs included:

- **Supporting local businesses and charity - Visit Orlando's Magical Dining:** A key component of this annual program is the charitable contribution. In 2020, this was more important than ever, with the profound need within our community due to the pandemic. A record \$345,378 was raised for this year's charity beneficiary, Feed the Need Florida. We coordinated our first socially distanced community media event for the official check presentation, which you can see in this [video](#), and secured more than 20 stories across local media outlets, including the [Orlando Sentinel](#), [WMFE](#), WESH/CW18 News and [Central Florida Lifestyle](#).
  - *"These funds are such a blessing, and we're going to be able to help so many families. A huge grant like this will allow us to continue to provide meals, support jobs and help people in our community. Our thanks go out to the entire community, Visit Orlando and to all the restaurants who participated."* – John Rivers, founder/CEO, 4Roots & 4 Rivers Restaurants.
- **Orlando's tourism outlook, research insights and marketing the destination:** Media were invited to attend Visit Orlando's virtual annual meeting, and the team pitched story ideas that shared the organization's tourism outlook with soundbites from our internal research expert. We conducted interviews to raise awareness of our "Off to Orlando" staycation marketing campaign and focused on the expected impact on holiday travel. These efforts resulted in more than 30 stories, including coverage by [WESH](#), [Orlando Sentinel](#), [Orlando Business Journal](#), [WKMG](#) and News 13.
- **Monthly Travel Updates:** On a monthly basis, Orange County shares Tourist Development Tax collection figures. To complement these announcements, we began offering local media additional information and statements on the health of our tourism industry, as well as forecasts

that take into consideration additional insights and figures. We secured more than 10 stories, including coverage by [WKMG](#) and Central Florida News 13.

### **Local Stakeholder Communications**

Our communications team produced bi-weekly e-newsletters to the industry and local community with destination news, research and trends, recaps from Orange County government press conferences and organizational updates. We also created informative presentations on Visit Orlando's activities and results to keep key stakeholders updated, including presentations to Orange County's Tourist Development Council, Visit Orlando's board of directors and our annual year-end event for members.

LinkedIn is our primary social media platform for industry and the local community, and we continued to grow its reach throughout 2020. In late December, when we announced Casandra Matej as our new president & CEO, it quickly became our best-performing post ever, generating 12 times the impressions of an average post. For the year, our LinkedIn channel grew by 40% to 21,336 followers, doubled total impressions over 2019, and increased engagement by 18%.

### **Meetings & Conventions Publicity**

For meetings and conventions publicity, the team continued to share news with key industry media on our destination's commitment to healthy meetings, including the Orlando Health collaboration, case studies of successful meetings, GBAC certifications and other updates from industry partners. Resulting stories appeared in [Northstar](#), [Prevue](#) and [Corporate and Incentive Travel](#), along with inclusion in [IMEX's daily show publication](#) promoting Orlando's accolades for safety. We also worked closely with the sales team to provide ongoing communication to potential and future clients regarding the latest destination and safety information.

## **MEMBER RELATIONS**

The 2021 membership renewal process launched in November. In the spirit of the times and in recognition of many hardships, all members received a 20% discount off their annual dues.

Our membership team focused on delivering relevant educational opportunities by producing a series of 10- minute tutorials (for practical "how to" information regarding their Visit Orlando membership), continuing to hold virtual member orientations and partnering with Visit Orlando member LMG studios to deliver our Annual Business "Luncheon" virtually to over 550 attendees. For the year, we hosted nearly 8,000 attendees via virtual events.

In the fourth quarter, we made more than 2,900 contacts with members. The primary focus of these interactions was discussing the benefits of membership renewal, support with accessing their leads, and



outreach to members to encourage them to participate in our numerous consumer offers programs (Orlando deals, member-to-member offers, the Florida resident program and more). In addition, we secured over 70 member restaurants to participate in Visit Orlando’s Magical Dining.

The team finalized elements for the new Member Connect 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:** The sales team secured future meetings and conventions with an estimated 117,000 attendees for the Orange County Convention Center, which will generate \$300 million in economic impact.
- **In-House:** The sales team secured future meetings and conventions with an estimated 30,000 attendees for Orange County hotels, which will generate \$44 million in economic impact.

### Citywide Production

October - December	Q4 2020	Year to Date
Future attendance <sup>1</sup> secured	117,300	378,649
Estimated room nights <sup>2</sup>	258,060	833,028

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

<sup>2</sup> Estimated room nights = attendance multiplied by average length of stay (2.2 nights)

### In-House Production

October - December	Q4 2020	Year to Date
Future attendance secured	30,122	246,337
Hotel room nights	62,680	537,633
Hotel leads	188	1,307

### Citywide Sales Key Bookings

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

- SURF Expo: 28,000 attendees, January 2022
- Florida Volleyball Challenge: 23,000 attendees, April 2022
- The NAFEM Show: 22,500 attendees, August 2021
- African Methodist Episcopal Church: 15,000 attendees, July 2021
- Leaky Con: 10,000 attendees, June 2021

### Hotel Key Bookings

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

- Avalara Annual Conference: 3,175 total room nights, October 2022
- StoneX GSM: 2,915 total room nights, March 2022
- Association of Proposal Management Professionals: 2,795 total room nights, May 2023
- IEEE Transducers Conference: 2,494 total room nights, June 2025
- Key Club International Convention: 2,085 total room nights, July 2025
- NRG danceProject Finals: 2,076 total room nights, July 2022
- Collegiate Information and Visitor Services SDI Meeting: 1,870 total room nights, June 2022

### Direct Sales Activities

Activity	Total Number	Total Participants
Tradeshows (virtual)	5	892
Virtual Site Visits	11	33
Client Presentation Events (virtual)	3	200

- Visit Orlando staff, along with members, attended Connect Marketplace, the first live tradeshow since Q1. Held at the Orlando World Center Marriott, the event allowed our sales team to meet with 74 clients and planners, spreading the message that Orlando is open for business and safely conducting successful programs.
- Convention sales attended the virtual program for Financial & Insurance Conference Planners (FICP) Symposium in November. FICP provides access to education, experience and resources targeting the needs of North American financial services and insurance meeting planners. This annual event draws more than 300 planners and hospitality partners.
- Convention sales met with 46 planners at the CDX Virtual Conference in November. This online event brought together corporate and association meeting planners for two days of educational

sessions and provided a networking “lounge” that allowed our team to connect with meeting planners and peers.

- Visit Orlando and members had the opportunity to conduct one-on-one interactions with preferred suppliers at the AMEX INTERaction virtual tradeshow in November. Over 120 meeting planners attended, providing an excellent forum for us to promote Orlando as a meetings destination.
- Visit Orlando, along with the Orange County Convention Center, attended IAEE’s annual meeting, the “Show of Shows.” The event drew over 1,200 registrations and included 620 organizers and 102 exhibiting companies. The International Association of Exhibitions and Events is an industry leader that brings together buyers and sellers and provides information, education and face-to-face opportunities to build business relationships.

### Destination Meeting Services

October - December	Q4 2020	Year to Date
Service Leads Issued <sup>1</sup>	11	289

<sup>1</sup> Lead is where the client asked us to submit their information to our members. It is up to the member to respond with a proposal directly to the client.

### TRAVEL INDUSTRY SALES

October – December	Q4 2020	Year to Date
Travel professionals trained (in-person and online)	3,750	30,600
Travel professional sales calls	95	985
Travel virtual professional events (tradeshows, missions, destination orientations)	1	5

In October, the travel industry sales team launched a three-day Virtual SuperFAM, reaching thousands of travel professionals and showcasing all that Orlando has to offer. The event was targeted to buyers from North America and featured airline partners, theme parks, hotels and attractions. Also, for North America, two sales webinars were conducted with AAA, utilizing its platform to reach travel professionals pushing drive and fly travel from Southeast markets. In addition, 14 webinars were conducted in Latin America and the UK, providing another opportunity for members and buyers to stay connected and ensure Orlando is top of mind.

In November, the team showcased Orlando at the WTM London virtual trade show, which provided a platform for one-on-one appointments with key travel industry professionals from the UK and Europe.

In December, our trade and marketing teams took part in the Discover America virtual trade show. Over 2,200 consumers attended, with upward of 200 travel agents, providing an opportunity to promote holiday and Q1 travel.

**Visit Orlando**  
**Results of Operations**  
**For the Twelve Months Ending December 31, 2020**

	<u>Fourth Quarter</u>	<u>Full Year</u>
<b>Revenues</b>		
Tourist Development Tax	7,598,768	29,358,578
<b>Expenses</b>		
Domestic Marketing	2,862,749	17,934,701
Convention Sales	927,408	4,741,629
Visitor Services	43,976	393,068
Public Relations	283,573	1,262,212
Destination Meeting Services	179,113	697,376
Market Research and Insights	207,962	754,810
Administration	933,298	4,016,610
Total Expenditures	5,438,079	29,800,406