

# Board HIGHLIGHTS



Orlando entered the summer season by garnering a string of accolades: top Memorial Day Weekend Destination, the Best City for Recreation in the U.S. and Forbes Magazine's vote for Most Affordable City for Family Travel. With a host of grand openings for new attractions and theme park rides, travelers had plenty of reasons to visit for the first time or return again to experience what's new.

Excitement for the destination was driven by Visit Orlando's targeted marketing efforts, including the spring advertising campaign which reached the highest domestic awareness to date. In addition, measures of intent to visit among our target audience reached an all-time for a spring campaign, indicating the campaign continues to resonate with our audience. A series of key market morning radio shows and television programs aimed at raising the profile of Orlando's culinary offerings rounded out our domestic initiatives.

Visit Orlando launched the first Mexican consumer-direct campaign in several years with a national media push of television, print, online and direct marketing. Our Colombian campaign focused on key target demographics and yielded 77 percent awareness. In addition, Orlando remains a leading vacation destination among Brazilians where top of mind awareness is climbing as well. Finally, high-level meetings in Canada with Travel Brands, West Jet Vacations and Air Canada Vacations are expected to result in peak advertising co-ops for the third and fourth quarters. This on the heels of two highly-visible co-op campaigns with Virgin Holidays and British Airways, which generated over 23 million impressions in the U.K. for our destination.

Coupled with our marketing efforts, Visit Orlando now offers two staffed Guest Service locations in prime locations along Florida's Turnpike. Both provide visitors with vital destination information and the ability to purchase attraction tickets. Also this quarter, Orlando was showcased to more than 230 travel trade professionals at the Arabian Travel Market attended by Visit Orlando, local tourism leaders and Orange County Mayor Teresa Jacobs. Working with participating members, we hosted a reception with Emirates Holidays to promote future travel from the Middle East.

More than 450 million global impressions of Orlando were generated thanks to two major announcements: the record-breaking visitation of 66 million visitors in 2015 and the NFL Pro Bowl's move to Orlando. As a result of significant media coverage, Orlando garnered robust exposure among local, national and international travelers.

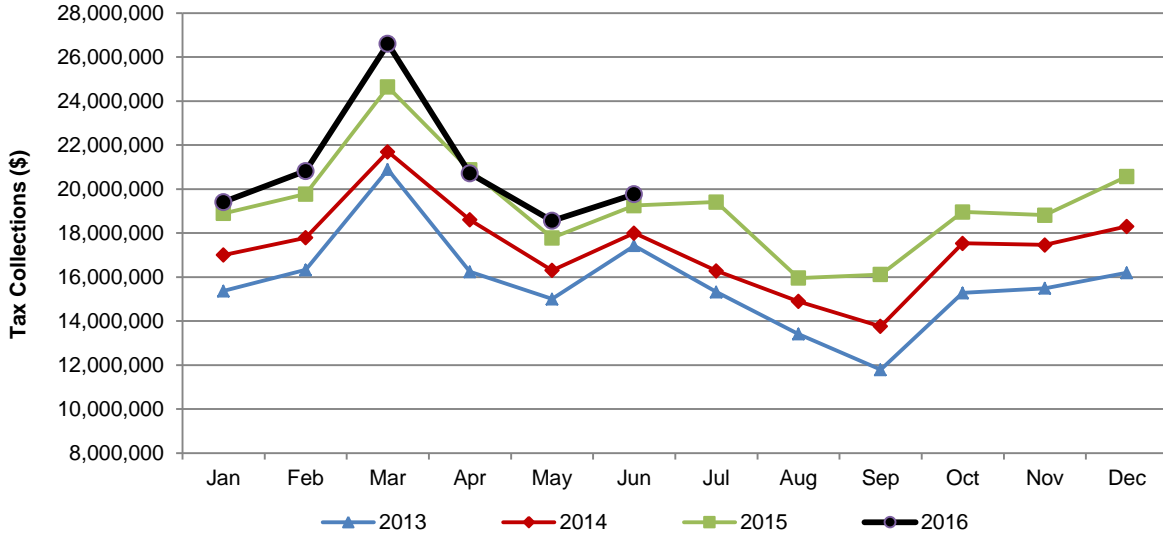
Finally, Visit Orlando served as the voice of our industry during the tragic events at the Pulse Nightclub. Fielding calls from media outlets across the globe, we provided a centralized source to answer member, media and visitor concerns. Like others in Orlando, we were overwhelmed with the love and support from across the nation and the world. With that crisis still fresh in our minds, we now turn to monitoring the Zika virus and its developments through local and international media inquiries.

Thanks to the contributions of our numerous tourism partners, Orlando stands ready to welcome even more travelers to our destination. As we continue to look ahead, our exciting new attractions and offerings will continue to fuel interest in the destination while bolstering our already burgeoning economy.

George Aguel  
President & CEO

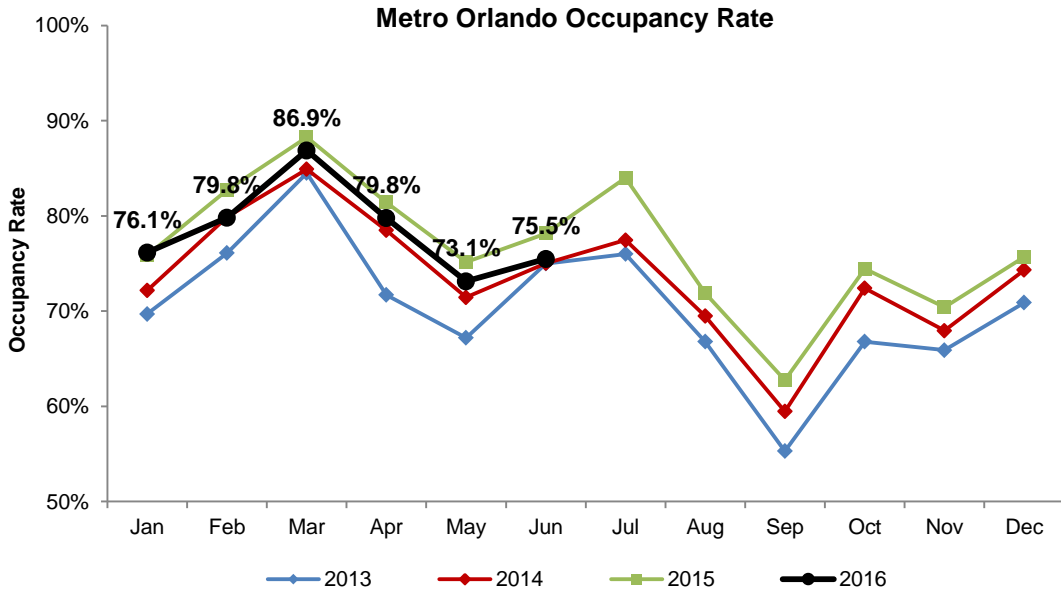
## INDUSTRY PERFORMANCE

### Orange County Tourist Development Tax Collections



### Metro Orlando Lodging Indicators

The following results are based on the January through June 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.



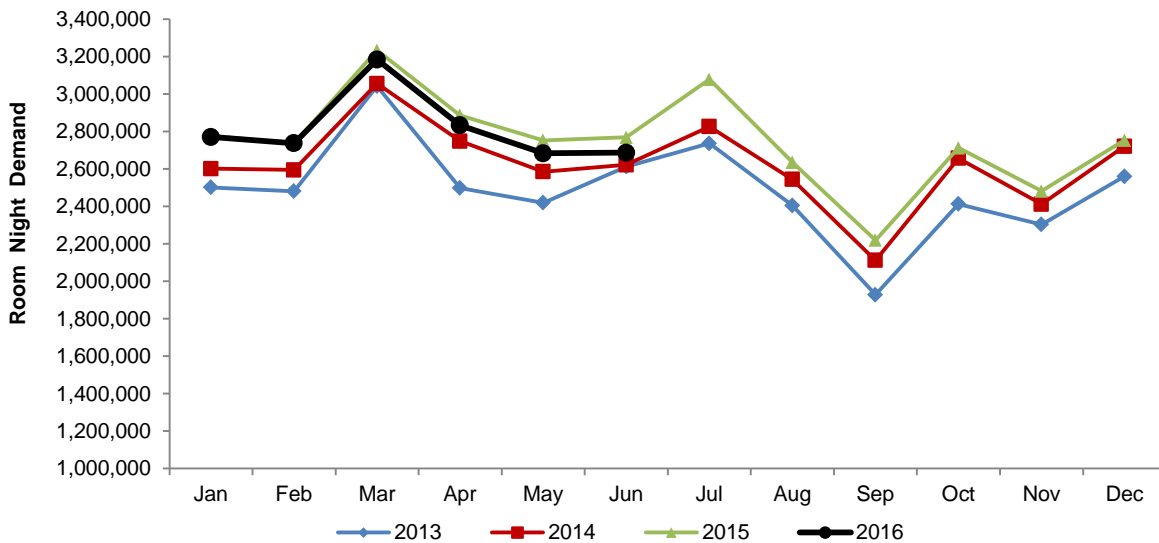
### Occupancy

	Q2 Results			Year-to-Date Results		
	2016	2015	Variance	2016	2015	Variance
<b>Orange County</b>	78.0%	81.2%	-3.9%	80.2%	82.6%	-2.9%
<b>Metro Orlando</b>	76.1%	78.2%	-2.7%	78.5%	80.2%	-2.0%
<b>National</b>	69.4%	68.9%	0.6%	65.1%	65.0%	0.1%
<b>Florida</b>	73.0%	73.2%	-0.3%	75.3%	75.9%	-0.8%

### Average Daily Rate

	Q2 Results			Year-to-Date Results		
	2016	2015	Variance	2016	2015	Variance
<b>Orange County</b>	\$121.81	\$119.13	2.3%	\$130.66	\$125.07	4.5%
<b>Metro Orlando</b>	\$113.68	\$111.05	2.4%	\$121.69	\$116.44	4.5%
<b>National</b>	\$124.43	\$120.94	2.9%	\$122.94	\$119.29	3.1%
<b>Florida</b>	\$130.71	\$128.95	1.4%	\$145.49	\$141.75	2.6%

### Metro Orlando Room Night Demand



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

	Q2 Results			Year-to-Date Results		
	2016	2015	Variance	2016	2015	Variance
<b>Supply<sup>1</sup></b>	10,781	10,752	0.3%	21,515	21,384	0.6%
<b>Demand<sup>2</sup></b>	8,204	8,409	-2.4%	16,896	17,156	-1.5%

<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

Due to the tragic incident and related media coverage in June, all advertising was stopped for two weeks.

#### United States Marketing Campaign

Our spring campaign concluded on April 3 with great success. The U.S. Advertising Awareness & Effectiveness Study for the campaign revealed that this campaign achieved the highest domestic awareness to date of our target audience at 77% (up from 65% in the Fall). The “Orlando Stories” creative continues to resonate well with our audience with another record-setting measure of impacting likelihood to visit at 34%. Additionally, the campaign continues to be efficient driving a higher ROI.

On April 18 Visit Orlando launched the Florida Resident campaign in Tampa, Jacksonville, West Palm and Miami. The integrated campaign drove our audience to the Florida Resident Special Deals website where they were required to register. It included radio, digital radio, social and digital display and ran through mid-June, delivering 40.8 million impressions and garnering more than 18,500 new subscribers.

#### Brazilian Marketing Campaign

The first flight of our Brazilian marketing campaign with the theme parks wrapped at the end of May. The campaign focused on a higher economic class families than previous campaigns. The messaging focused on value and taking action, and ran in print, television, online, social media and direct marketing. Paid social media efforts through Facebook and Instagram ads had above average engagement results through likes, comments and sharing. Direct marketing efforts continue to reach our target and provide valuable and engaging information regarding the destination. E-Newsletters were delivered to over 83,000 unique subscribers and had a unique open rate of 13.5%. Results from the spring ad tracking study showed a 75% awareness and intent to travel of 33% among those who saw our advertising. This was 14% higher than those that didn't see our ads. Among the affluent target, Orlando remains the leading vacation destination outside Brazil, and top-of-mind awareness of Orlando has risen to 14%. The campaign will resume in mid-August after the Brazilian winter travel period.

#### Canadian Marketing Campaign

In an effort to keep Orlando on the minds of Canadians, Visit Orlando has continued the “always on” strategy by maintaining its social presence on Facebook. While promoting new rides, restaurants and other entertainment coming into the marketplace, Visit Orlando has pushed the “Deals Made for Canadians” page of the website, which garners the most interest from potential Canadian travelers. In addition, Visit Orlando continues to run a SEM/SEO program. Total impressions for these efforts were over 7 million.

As part of the Global Radio Broadcast Event that took place in April, two top radio stations from Toronto and Kitchener broadcasted live from Orlando for one week, showcasing the breadth and depth of the destination. In addition to their on-air broadcast the radio hosts proactively engaged their listeners with a tremendous amount of social media posts including pictures, testimonials and produced videos all designed to promote Orlando. As a result, together the stations generated 6.5 million impressions and an equivalent media value of \$330,000.

The publicity team has continued to generate syndicated coverage across Canada, with articles highlighting our visitation announcement as well as leisure stories about Orlando being a top destination for summer travel. After the second quarter, team has already achieved 97% of its yearly publicity goal in Canada.

In April, high level meetings were completed with Travel Brands, West Jet Vacations and Air Canada Vacations to begin discussions on co-ops for peak advertising times in third and fourth quarters. Visit Orlando was also represented at travel agent shows in Toronto and Montreal to connect with the trade in the destination's two key markets. Visit Orlando hosted a FAM for key accounts in early May, as well as visited Western Canada to partner with WestJet Vacations in Vancouver, Calgary and Edmonton. Face-to-face trainings, webinars and an incentive to maximize Travel Academy graduates are part of an ongoing effort.

### **China Marketing Campaign**

Partnering with Walt Disney World Resorts, Visit Orlando invested in the VISIT FLORIDA co-op campaign. Through the campaign, Visit Orlando and Walt Disney World Resorts were included in two broadcast segments, social media and print for an estimated total of 126 million impressions.

### **Colombian Marketing Campaign**

The first flight of the marketing campaign in conjunction with the theme parks wrapped up at the end of May. The Colombian campaign focused on our key target demographics by reaching them through television, print, online and direct marketing. Results from the spring ad tracking study showed a 77% awareness and intent to travel of 30% among our target that saw our advertising, which was 8% higher than those that didn't see our ads. Orlando remains among the top vacation destinations for Colombians. Top-of-mind awareness reached nearly 10% in the spring wave, second only to the beaches/seaside.

Direct marketing efforts continue to reach our target audience and provide valuable and engaging information regarding the destination. E-Newsletters were delivered to over 16,000 unique subscribers and had a unique open rate of 23.5%, above industry standards. The campaign will resume in September after the Colombian summer travel period.

### **Mexico Marketing Campaign**

The first Mexican consumer-direct campaign in many years launched mid-May and ran until mid-July. This campaign leveraged Brand USA dollars to extend it. The campaign targeted women with children in the A/B class. National media consists of television, print, online and direct marketing. In addition, social media paid efforts through Facebook will deliver the campaign message and engage with consumers.

### **United Kingdom Marketing Campaign**

Visit Orlando participated in two VISIT FLORIDA Co-op Campaigns to support key trade partners during the second largest booking window of the year. One campaign partnered with Virgin Holidays from May 1 – 31 and included high-impact print and outdoor media exposure. The second campaign partnered with British Airways from May 23 – June 5 and featured print, targeted digital and social media posts, along with interactive digital display units. Combined, these campaigns generated over 23 million impressions for the destination.

Direct marketing efforts continue to support our target and provide engaging information regarding news of the destination. The U.K. database has increased 14% and consists of approximately 158,000 subscribers, with click-through rate for our second quarter eNewsletters at 15%.

Almost three million listeners tuned in to a series of live and pre-recorded radio interviews conducted June 3, which aired across 17 stations on U.K. BBC Radio. The segments, secured by the publicity team, featured interviews with Kalpana Fitzpatrick, a third party Orlando spokesperson known as the "mum who knows money," and focused on how families can find value and save money in Orlando.

### **Media Buy**

<b>Advertising Campaigns</b>	<b>Impressions</b>	<b>Description</b>
United States	83,374,000	Radio, Digital Radio, Print, Digital Display, Paid Social, SEM, Out of Home and Social
Brazil	119,753,000	Print, TV, Digital and SEM
Canada	7,165,000	Social and SEM
Colombia	28,814,000	Print, TV, Digital and SEM
Mexico	24,472,000	Print, TV, Digital and SEM
United Kingdom	29,123,000	Digital and SEM

## Global Website – VisitOrlando.com

April - June	Q2 Results			Year-to-Date Results		
	2016	2015	Variance	2016	2015	Variance
Monthly Users	3,625,609	2,889,219	25.0%	6,374,850	5,063,736	26.0%
Total Page Views	11,242,281	11,060,222	2.0%	21,673,423	21,434,592	1.0%
Time Per Visit (average minutes)	1:43	2:02	-15.0%	1:56	2:14	-10.0%

The increase in Monthly Users is related to a Brazilian campaign with Soicos, which had very high response rate. This same campaign inversely affected the Time per Visit, as it had a higher than normal bounce rate, resulting in lower average session duration.

### Partnership Marketing

During the month of April, a Global Radio Broadcast event took place during which Visit Orlando hosted 16 radio morning shows from the United States (Chicago, NY and Florida), Canada, Brazil and the U.K. Each radio station broadcasted live from Orlando for a full week, showcasing the breadth and depth of the destination to their millions of loyal listeners. In addition to their on-air broadcast, the radio hosts proactively engaged with their listeners by posting tremendous amounts of social media posts including pictures, testimonials and produced videos all designed to promote Orlando. Each of the radio stations also conducted a two-week promotion. The event generated \$1.9 million in equivalent media value and over 59 million impressions. As a result of this effort, more than 3,000 names were added to Visit Orlando's database.

Showcasing Orlando's incredible culinary offerings, "Dish Worth The Drive" (TV show) was syndicated across 55 markets in the U.S. southeast and ran between April 17 and May 28 with a total of 37 airings. The show featured a series of locations ranging from Prato/Luma on Park, K Restaurant and Whisper Creek Farm: The Kitchen. This eight-minute segment generated over \$152,000 in equivalent media value and over 1 million impressions.

Featuring the destination in emerging markets such as China is an important step in growing Orlando's visitor base. As a result, Visit Orlando and VISIT FLORIDA partnered on a broadcast initiative that not only aired on traditional television in China, but also was repurposed as to also air in locations such as elevators, taxis and online. Cumulatively this initiative will generate a staggering 210 million impressions.

Below are some highlights from our second quarter activity:

April - June	Media Value	Market	Form of Media	Impressions
Global Radio Broadcast Event	\$1,869,000	U.S. / Brazil / Canada / U.K.	Radio/ Online	59,503,000
Dish Worth Drive TV broadcast	\$153,000	U.S.	TV	1,072,000
China World Traveler	\$102,000	China	TV / Outdoor / Online	210,000,000
<b>Totals:</b>	<b>\$2,124,000</b>			<b>270,575,000</b>

## Consumer Fulfillment

Print and digital fulfillment of U.S. and Canada Vacation Planning Kits.

April - June	Q2 Results			Year-to-Date Results		
	Fulfillment Kit Forecast	Fulfillment Kits Sent Out	Forecast Variance	Fulfillment Kit Forecast YTD	Fulfillment Kits Sent Out YTD	Forecast Variance YTD*
	49,500	39,627	-20.0%	82,950	72,819	-12%

\*Additional kits from a first quarter initiative were delayed and will be sent out in July.

## Direct Marketing

### e-Newsletters

Market	Delivered	Open Rate	Click Through Rate
United States Consumer	5,943,000	8.2%	11.3%
Florida Consumer	997,000	11.6%	23.4%
International Consumer	412,000	16.9%	14.5%

### Visitor Services

Visit Orlando now has two staffed Guest Service locations on Florida's turnpike, Ft. Drum that opened in February and West Palm which opened in May. Both locations provide visitors with information on Orlando as well as the ability to purchase attraction tickets.

April - June	Q2 Results			Year-to-Date Results		
	2016	2015	Variance	2016	2015	Variance
Number of Walk-ins (Visitor Center)	18,400	29,700	-38.0%	43,000	57,100	-24.5%
Contacts Received (Calls, Live-Chat & Email)	11,500	14,300	-19.5%	24,200	27,400	-11.7%

The sharp decline in visitation to the Visitor's Center has to do with the destination being flat as well as a shift from in-person to online transactions. Although the number of contacts has decreased online ticket sales have increased versus prior year.

### Travel Industry Sales

Visit Orlando showcased the destination and promoted future travel to more than 230 travel trade professionals at the Arabian Travel Market. Orange County Mayor Teresa Jacobs and Chief of Staff Graciela Noriega Jacoby joined local tourism leaders to represent Orlando to the Middle Eastern, Asian and Indian markets.

These new markets were opened to Orlando last fall with the launch of Emirate's new daily direct flights from Dubai. The new flights have been heralded by local leaders as an opportunity to build leisure and business travel, as well as jobs for local residents.

Participating members in the show with Visit Orlando included Walt Disney World Resort, Universal Orlando Resort, SeaWorld Parks & Entertainment, Florida Dolphin Tours & Transportation, Fun Spot America Theme Parks, Orlando Magic and Ramada Plaza Resort & Suites International Drive Orlando.

Travel Industry Sales & Marketing activities for second quarter included activities in the United States, Brazil, Canada, Colombia, Germany/Scandinavia, Mexico, Southern Cone (Argentina, Chile and Uruguay) and United Kingdom/Ireland.

April - June	Q2 Results			Year-to-Date Results		
	2016	2015	Variance	2016	2015	Variance
<b>Total Tradeshows</b>	12	13	-7.7%	29	35	-17.1%
<b>Client Contacts</b>	3,501	5,992	-41.6%	17,061	18,538	-8.0%
<b>Total Missions</b>	1	0	NA	12	2	500.0%
<b>Client Contacts</b>	322	0	NA	1,016	729	39.4%
<b>Total Client Events</b>	27	27	0.0%	89	75	18.7%
<b>Client Contacts</b>	2,411	1,772	36.1%	9,213	6,503	41.7%
<b>Total Sales Calls</b>	1,600	998	60.3%	2,756	2,096	31.5%
<b>Client Contacts</b>	1,907	1,260	51.3%	3,509	2,636	33.1%
<b>Total FAMs</b>	10	14	-28.6%	13	19	-31.6%
<b>Client Contacts</b>	122	306	-60.1%	148	343	-56.9%
<b>Total Educational Seminars</b>	134	132	1.5%	236	223	5.8%
<b>Client Contacts</b>	7,467	7,758	-3.8%	15,417	14,241	8.3%
<b>Total Online Trainings</b>	1,038	753	37.8%	1,991	1,422	40.0%

Total Missions variance is due to the U.K. mission which consists of eight cities and is not the typical back-to-back format but takes place over two to three weeks. The 2015 mission format was done a bit differently and counted as one versus eight.

Trade Shows includes Table Tops; postponed Brazil table top seminars to third and fourth quarters to monitor market conditions. Contacts are up due to ATM participation.

FAMs activity will increase/level out third and fourth quarter as airline seats will become available to host the fams.

Client contacts are up due to our participation at ATM with more than 400 client contacts.

## GLOBAL COMMUNICATIONS

### Global Communications

Publicity results in the second quarter were driven by two major announcements – record-breaking visitation of 66 million visitors to Orlando in 2015 and the move of the NFL's Pro Bowl to Orlando. The 2015 visitation numbers were revealed during Visit Orlando's May luncheon, and results were largely driven by an exclusive Associated Press story. Local, national and international coverage combined totaled more than 450 million impressions. Visit Orlando worked closely with the NFL and other key partners to position the destination in the announcement of the Pro Bowl move to Orlando, securing more than 300 million impressions.

Following the events of June 12, Visit Orlando immediately established a communication center to centralize our efforts on behalf of the tourism industry, allowing us to track story development, media and online coverage and stay in close contact with local public officials, tourism leaders and our industry partners to align our organization's support and resources with theirs.



We also served as the voice of the destination for the tourism community, providing a centralized source to answer member, media inquiries and visitor concerns. From a visitor information standpoint, we received only a handful of inquiries from consumers regarding safety, and conversely an outpouring of support for Orlando as a beloved travel destination.

### **Global Publicity**

April - June	Q2 Results			Year-to-Date Results		
	2016	2015	Variance	2016	2015	Variance
<b>Impressions Public Relations</b>	2.695B	2.430B	10.9%	3.744B	3.558B	5.2%

### **Social Media**

Our social media platforms placated the opportunity for negative audience sentiment among our international and domestic visitors in response to the back-to-back crisis events in June through the posting of emotionally evoking content including original videos and imagery, along with the introduction of our new social call to action, #LoveOrlando. These efforts generated a 77% increase in audience engagement on social media in the month of June with overwhelming support and love for the destination shared from our audiences. In addition, a strategic focus on developing content for emerging platforms has provided an 44% overall increase in non-advertising impressions along with an overall 55% increase in audience engagement. Our efforts also recorded an uptick in click-through to our website and tickets sales directly from our social media platforms. Blog views were down in Q2 due to the fact that there were no blog posts for two weeks after the Pulse incident.

### **Social Media**

April - June	Q2 Results			Year-to-Date Results		
	2016	2015	Variance	2016	2015	Variance
<b>Impressions Paid + Organic Impressions (Facebook)</b>	118.6M	22.0M	437.9%	134.7M	37.5M	259.7%
<b>Visit Orlando Blog (Total Page Views)</b>	431,540	575,627	-25.0%	925,112	921,112	0.5%

### **Corporate Communications**

#### **Media Relations**

Communications worked to produce the reoccurring, two-page spread focused on travel and tourism in *i4 Business* magazine each month. Topics during the second quarter included employment in the hospitality industry and medical tourism.

#### **Crisis Communications**

Communications continued to closely monitor the Zika outbreak. During the second quarter, according to the Florida Department of Health, there were no locally acquired cases reported in the state of Florida. Additionally, there were no travel advisories, issued by state, federal or international public health officials, advising people against to travel to Florida. *(Note: this information reflects second quarter. The local acquired case in Florida was not identified until July 29.)*

Visit Orlando also works closely with the Orange County Office of Emergency Management (OCOEM) and accommodation partners to assist those who evacuate to the Orlando area in finding safe accommodations. The Communications team participated in the state-wide emergency exercise.

In addition, Corporate Communications participates in monthly Crime Intel Meetings with law enforcement in the Tourist Oriented Policing Squad (TOPS) program and security managers from various venues in the corridor.

### **Speakers Bureau**

Communications developed presentations that educate the community on the role of Visit Orlando and showcase the positive and significant impact travel and tourism has on Central Florida. During the second quarter, Visit Orlando presented to seven different business and community groups, including the Tourist Development Council, Digital Now Convention, West Orange Chamber and the World Affairs Council delegation.

### **National Travel & Tourism Week**

Visit Orlando, along with numerous community partners, recognized the annual National Travel & Tourism Week (NTTW) with a series of events and activities. Orange County Mayor Teresa Jacobs and City of Orlando Mayor Buddy Dyer praised the men and women in tourism for their role in attracting and hosting more than 66 million visitors to the destination. The highlight of the week came when Orlando celebrated with Emmy Award-winning travel reporter Peter Greenberg during the Visit Orlando Travel & Tourism Luncheon. Greenberg provided a glimpse into the trends that are emerging in travel and his global perspective on what can be expected for the future.

Students from local area high schools also participated in the week-long celebration with a behind-the-scenes tour of the Orange County Convention Center and were invited to attend the Travel & Tourism Luncheon on behalf of Visit Orlando. Visit Orlando has been a long-standing partner of the Academy of Hospitality & Tourism in an effort to provide insight into possible career opportunities in the travel industry.

### **Corporate Social Responsibility (CSR)**

Visit Orlando attended fundraising events that benefited the American Cancer Society, Boys & Girls Club of Central Florida, Rosen College, and United Way, as well as supported CFHLA's Bacchus Bash, which raises funds for scholarships.

Visit Orlando's annual golf tournament beneficiary, Mustard Seed of Central Florida – which provides household furnishings and clothing to those who have suffered disaster or personal tragedy – was presented with a \$13,800 donation. Visit Orlando members continued their support of Big Brothers Big Sisters of Central Florida at the Travel & Tourism Luncheon by bringing in-kind donations.

### **Business Partnerships**

Corporate Communications continued building relationships with the local Chambers to create a broad-based public appreciation for the role of the travel and tourism industry in Central Florida. The team was represented at the Orlando EDC James B. Greene Awards and Orange County State of Schools Address. Visit Orlando was also a sponsor at the Hispanic Business Conference, which was attended by more than 600 community and business leaders.

## **MEMBER DEVELOPMENT**

During the second quarter, the Member Development Sales team closed advertising sales for the *Official Tour and Travel Reference Manual*, *Orlando Arts Magazine* and Marketing co-ops such as the AAA magazines. Sales were steady in those programs, but slightly under budget. A contributing factor may be a slowdown in hotel bookings during this period. Several digital programs also were sold during this time frame, which included search engine co-ops, digital response co-ops and the consumer and Florida resident e-Newsletters. Advertisers seem to be supporting more digital and Florida resident programs to help drive immediate summer business. Additionally, the sales team sold corporate sponsorship packages for the May luncheon, which exceeded the previous luncheon table sales by 16%. As the caliber of speakers continue to escalate, the desire and interest to attend the signature events increases as well.

## PRINT & DIGITAL

During the second quarter the print and digital services team designed and produced a number of key marketing pieces including the 2016-17 Professional Meeting Planners Guide, along with the completion of the May/June issue and the July/Aug issue of *Orlando Arts Magazine*. The team also produced and implemented 640 other projects to support Visit Orlando's strategic goals.

## MEETINGS & CONVENTIONS

### Convention Sales Performance

The Citywide Sales team booked an estimated 320,619 attendees in the second quarter. High future occupancy at the Orange County Convention Center has had a negative effect on production and we have been unable to book business that we might have been able to previously book. The Center will host a total of 116 citywide events in 2016, up from 97 in 2015. Citywide attendance at the Center for the first half of 2016 was at 768,500 attendees which is a 4% increase over the first half of 2015 which had 739,987 attendees.

The Business Development & In-Market team booked 213,323 room nights in the second quarter. This is a 115% increase from the second quarter of 2015.

April - June	Q2 Results			Year-to-Date Results		
	2016	2015	Variance	2016	2015	Variance
Citywide Definite Attendance	320,619	391,915	-18%	555,357	602,964	-8%
City-Wide Estimated Room Nights <sup>1</sup>	705,362	862,213	-18%	1,221,785	1,326,521	-8%
Business Development and In-Market Room Nights	213,323	99,284	115%	369,480	299,304	23%
Business Development and In-Market Attendance	71,083	41,433	72%	129,098	118,233	9%
Business Development Specialist Leads	236	216	9%	510	431	18%

<sup>1</sup> Estimated Room Nights = Definite attendance multiplied by average length of stay (2.2 nights)

### Citywide Sales Key Bookings

Key bookings in the second quarter included the International Air Conditioning, Heating, Refrigerating Exposition, Premiere Show Group, and The Assemblies of God. The International Air Conditioning, Heating, Refrigerating Exposition will bring their annual AHR Expo to Orlando in February 2020 with 60,000 attendees. Premiere Show Group will host their annual Premiere Beauty Show in Orlando with 57,000 attendees in June 2021. The Assemblies of God chose Orlando to host their Biennial International Convention in July 2019 with 27,000 attendees.

Additionally, the Citywide team booked several meetings that included Church of God, American Society of Nephrology, and Golf Course Superintendents Association of America. Church of God will bring their Biennial General Assembly in July of 2018 with 13,000 attendees. The American Society of Nephrology has not met in Orlando since 1994 and will bring their Kidney Week meeting in November 2022 with 13,000 attendees. Golf Course Superintendents Association of America will bring 16,000 attendees to the destination in January of 2020 for their annual Golf Industry Show.

## **Business Development & In-Market Key Bookings**

Key bookings in the second quarter included Tyler Technologies Connect User Conference 2020, which will bring 3,500 attendees to the destination in April 2020, Kubota Tractor Dealer Meeting 2018, which will bring 3,500 attendees to Orlando in September 2018, and the American Association for Marriage and Family Therapy Fall National Convention, which will bring 1,700 attendees to the destination in September 2017.

### **Direct Sales Activities**

<b>Activity</b>	<b>Total Number</b>	<b>Total Number of Participants/Attendees</b>
<b>Tradeshows</b>	10	9,700
<b>Missions</b>	1	181
<b>Client Event</b>	4	1,100
<b>Fams</b>	3	24

Visit Orlando and Orange County Convention Center representatives attended the Society of Independent Show Organizers (SISO) CEO Summit held in San Diego, California, April 3-6. SISO members include companies, corporations and other for-profit entities that own, produce or provide full-service management of "face-to-face" trade shows, consumer shows, expositions, conferences and /or similar events as a substantial part of their business. The prestigious Summit is attended by company owners, CEOs and presidents who network with peers and are involved in creating the strategies that will map out the short- and long-term future for the industry.

The Business Development Team hosted the HelmsBriscoe New Associate FAM on April 7-9. The 13 planners that attended are not new to our industry but must be employed by HelmsBriscoe less than a year to qualify to attend. During their three-day visit, the group received an extensive education on the destination while touring many of the area's hotels and venues.

More than 600 meeting planners and 1,200 suppliers descended on HelmsBriscoe's 24th Business Conference in Phoenix. On June 6-10, Visit Orlando, attended to engage and network with key meetings planners throughout the conference and trade fair.

Visit Orlando was well represented at PCMA's Visionary Awards, benefiting PCMA's Education Foundation on April 27 in Washington, DC. This was a networking and marketing opportunity for Visit Orlando. The event is attended by all major destinations and more importantly, top association clients including decision makers and executives. The Visionary Awards, attended by 1,100 guests, recognizes the achievements of planners, suppliers and educators.

Visit Orlando's Business Development team hosted nine corporate and association meeting planners on a FAM, May 19-22. The group visited nine hotels, Universal Studios, Mango's Tropical Café, I-Drive 360 and Disney Springs. This was the first time several of these planners considered Orlando.

Visit Orlando, the Orange County Convention Center, and Rosen Hotels were sponsors at the PCMA Partnership Summit on June 2-5 in Braselton, Georgia. This event is an invitation-only, executive-level education, VIP networking and business development event which raises funds in support of the PCMA Education Foundation. There were a total of 85 clients and 33 sponsors in attendance for this event with Orlando hosting nine citywide clients.

Visit Orlando held a highly successful New York Sales Mission on June 8 that attracted over 80 meeting professionals from the New York/New Jersey area. Eighteen members were able to network with these key meeting professionals.

### **Convention Marketing Update**

In an effort to maintain Visit Orlando’s position as the number one meetings destination in the country and grow our in-house business leads, Convention Marketing runs two annual advertising campaigns targeting meeting professionals in the U.S. and Canada. These campaigns include the annual Convention Co-op media plan and Non-citywide media plan.

The Convention Co-op media plan includes the 24-page “Orlando Destination Guide” custom insert, which runs nine times across the top national meeting trade publications throughout the year. In addition, a comprehensive digital media schedule with shared banners and co-op emails to increase exposure for participating co-op partners. In the second quarter, the insert ran in *Successful Meetings* and *Smart Meetings* in April and the May issues of PCMA’s *Convene* and MPI’s *The Meeting Professional*. The campaign delivered a total of 8 million print and digital impressions.

The Non-citywide/Brand media plan promotes Visit Orlando’s In-house meeting capabilities and new product offering with print and heavy digital national destination brand coverage. In the second quarter, our new M&C brand ads ran on the back cover of *Meetings Today* in April, in *Facilities & Destinations* and *Insurance & Financial Meetings* in May, as well as June issues of *Meetings & Conventions*, MPI’s *The Meeting Professional*, and *Meeting Mentor* magazine. In addition, our unique high-impact two-page spread gatefold in-house ad ran in the April and May issues of *Meetings & Conventions* and *Successful Meetings* magazines. Digital media continued through May with targeted display banners as well as interactive expandable video banners. The campaign delivered a total of 7.4 million print and digital impressions in the second quarter.

### **e-Newsletters**

<b>Market</b>	<b>Month</b>	<b>Delivered</b>	<b>Open Rate</b>	<b>Click Through Rate</b>
Meetings Matters Q2	May	19,146	9.7%	5.5%

### **Destination Meeting Services**

The Destination Services team conducted 77 client sites and meetings in the second quarter. The DS team also conducted 78 member sites and meetings. Service leads decreased slightly compared to second quarter 2015. The registration staffing team actualized \$237,387 of revenue for the second quarter, which was higher than the same quarter last year of \$229,614.

<b>April – June 2016</b>	<b>Q2 Results</b>			<b>Year-to-Date Results</b>		
	<b>2016</b>	<b>2015</b>	<b>Variance</b>	<b>2016</b>	<b>2015</b>	<b>Variance</b>
<b>Service Leads Issued</b>	153	169	-9%	335	374	-10%