

## A Record Number of Visitors in the Theme Park Capital of the World®

Why break one record when you can break two? In May, Visit Orlando unveiled our destination's new milestone (68 million visitors in 2016) *and* set the GUINNESS WORLD RECORDS™ title for "Most Greetings Cards Collected in 24 Hours." To express our gratitude to visitors, the local tourism community handwrote thank you cards to launch the #OrlandosBIGThankYou campaign, which will continue to be leveraged throughout the year on social and digital platforms, and with more cards by Visit Orlando and our member organizations.

Halfway through 2017, key indicators were up across the board. In comparison to the first half of 2016, which was also a strong year: hotel demand and occupancy rates have risen more than 3 percent, passenger traffic at Orlando International Airport is at a record, up 5.3 percent, and attendance at the Orange County Convention Center grew a whopping 18 percent, on pace for another record. On the economic front, the county is collecting more revenue from the Tourism Development Tax and tourism-generated sales tax, and industry employment has also seen significant gains.

Adding to the success, Orlando was named Cvent's "Top Meetings Destination" for the third straight year, and Visit Orlando captured our fourth consecutive "Destination Partner of the Year" award from a leading convention planning company, Conference Direct.

To help drive visitation through the spring and summer seasons, Visit Orlando launched a campaign leading up to Father's Day; partnered with NBC morning shows in New York and Atlanta on several TV segments; and coordinated extended in-destination radio broadcasts that included stations from major East Coast markets, South America and the United Kingdom.

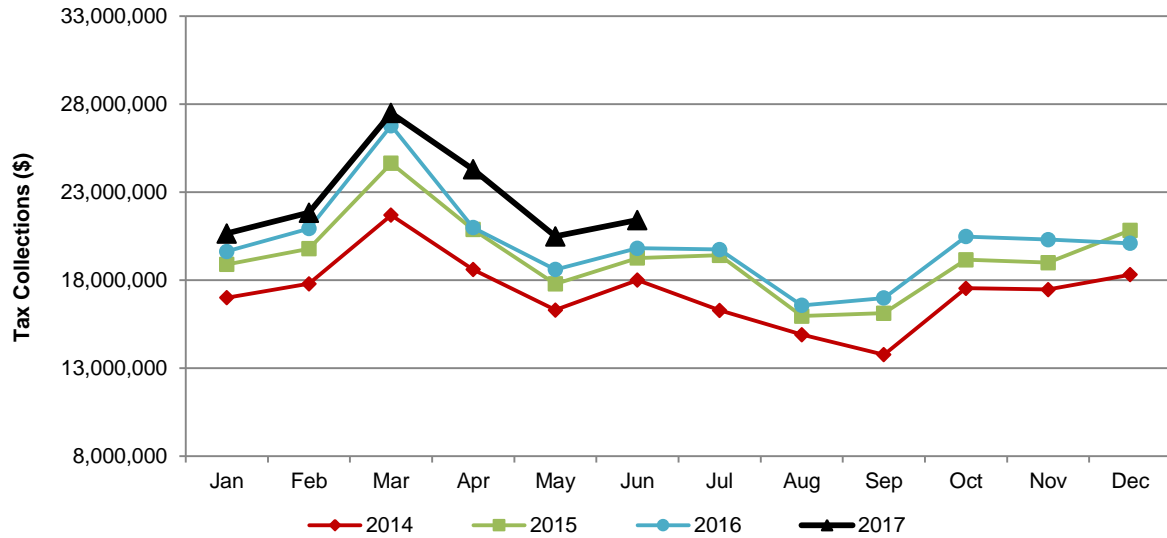
On the membership front, Visit Orlando continued to ramp up our member service efforts, launching several well-received networking and education programs. Other well-attended events included our member get together at Pointe Orlando and our annual Celebrating Travel & Tourism Luncheon, which had record attendance.

Looking ahead, an impressive list of new and planned attractions will further strengthen Orlando's status as the Theme Park Capital of the World®. (That oft-repeated designation, by the way, is now officially registered with the U.S. Patent and Trademark Office, thanks to the efforts of Visit Orlando.) Travelers know they can always expect fresh new experiences from our destination, and we're honored to play a big role in spreading the word about everything Orlando has to offer — including why visitors need to return, again and again.

George Aguel  
President & CEO

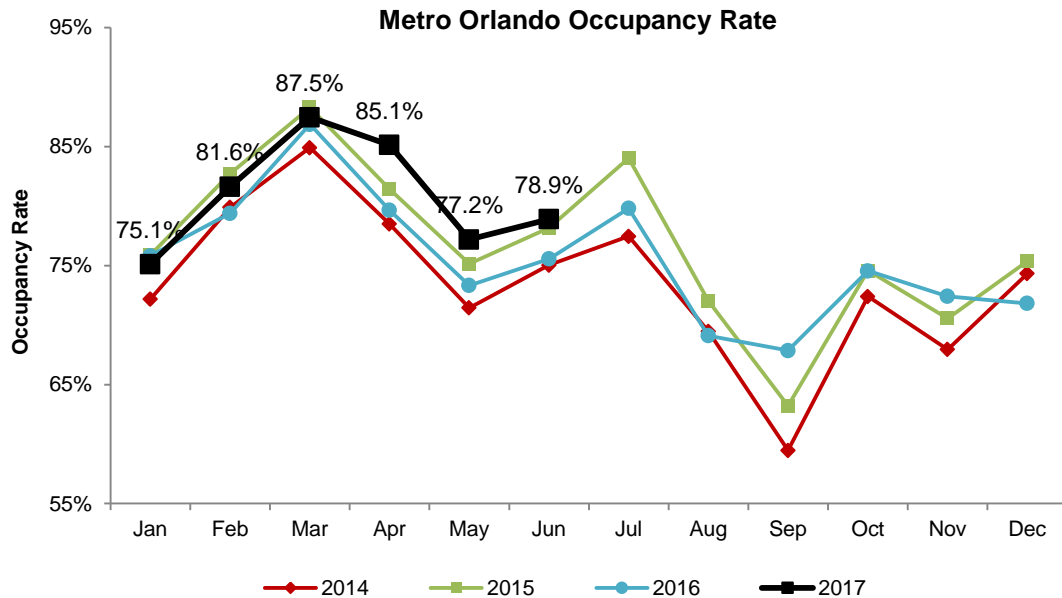
## INDUSTRY PERFORMANCE

### Orange County Tourist Development Tax Collections



### Metro Orlando Lodging Indicators

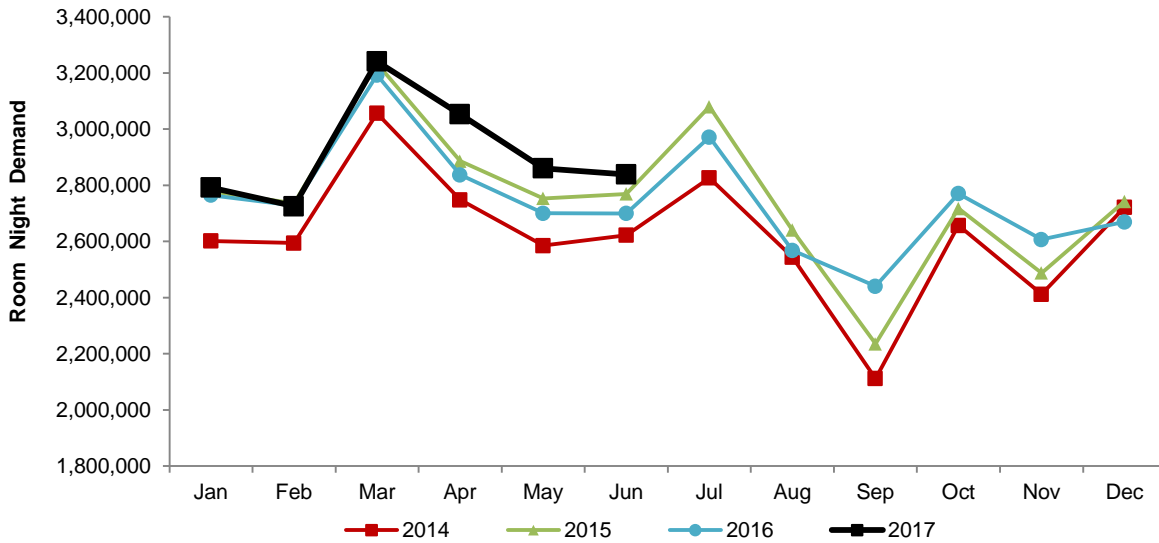
The following data are based on the January through June results released by STR. Please note that STR information does not include Disney-owned and -operated hotels, nor does it include the short-term rental of alternative accommodations such as timeshares, condos and vacation homes.



Occupancy		
Jan-June	Q2 Results	Year-to-Date Results
	2017	2017
Orange County	82.7%	82.9%
Metro Orlando	80.4%	80.9%
Florida	74.7%	76.4%
National	69.5%	65.4%

Average Daily Rate		
Jan-June	Q2 Results	Year-to-Date Results
	2017	2017
Orange County	\$130.20	\$136.41
Metro Orlando	\$122.07	\$127.75
Florida	\$136.40	\$148.05
National	\$127.39	\$126.01

**Metro Orlando Room Night Demand**



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

Jan-June	Q2 Results	Year-to-Date Results
	2017	2017
Supply <sup>1</sup>	10.891	21.652
Demand <sup>2</sup>	8.752	17.511

<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

## **GLOBAL MARKETING**

### **United States Marketing Campaign**

Visit Orlando continued our comprehensive spring campaign to drive consideration for our destination during this key vacation planning period.

The second quarter saw the continuance of the domestic campaign, with initiatives targeting consumers in key Northeastern markets such as New York and Philadelphia, as well as the important Atlanta market. These initiatives included traditional and digital TV spots, TV promotions, radio ads, online ads, search engine marketing and social advertising. They also included creative out-of-home advertising through eye-catching visuals that showcased Orlando on: wrapped double-decker buses; spectacular displays in iconic locations such as Macy's, Times Square, the Port Authority, Bryant Park and Penn Plaza; posters in commuter rail cars; and out-of-home boards targeting residents in affluent neighborhoods.

In April, Visit Orlando launched the "Super Days for Super Dads" campaign leading up to Father's Day. The campaign utilized digital TV and radio, as well as an integrated sweepstakes with trip giveaways that were promoted on-air and digitally on radio stations in key markets. In addition to impacting overall brand awareness, the dad campaign also resulted in incremental email leads that can be used for remarketing efforts, and generated incremental impressions on top of our traditional broadcast buys.

The Florida campaign continued in Tampa, Jacksonville, Miami and West Palm Beach, with traditional and digital TV spots and TV promotions, radio ads, online ads, search and social support. Our in-market campaign reached visitors in Orlando with digital, social and search initiatives to help their vacation planning and inspire additional purchases. Member co-op campaigns also were underway in key markets, including ads in print, online and social media.

From a partnership marketing perspective, the organization secured a week-long television broadcast on NBC's "New York Live" morning show and on NBC morning shows in Miami and Atlanta. Visit Orlando worked with NBC to create a series of segments that showcased the destination's breadth and depth. Segments on the hit morning shows included a live in-studio piece, as well as four pre-produced pieces that explored "What's New," "Outdoor Adventures," "Luxury in Orlando" and "Orlando's Dynamic Dining Scene." Visit Orlando also coordinated a week-long live radio broadcast where stations from New York, Philadelphia, Atlanta, Miami, Tampa, West Palm Beach and Jacksonville descended on Orlando to showcase our destination, along with all that is new and exciting this summer.

### **Brazil Marketing Campaign**

The first flight of the Brazil marketing campaign wrapped at the end of June. The national media focused on our key target demographic, A-class moms, and connected with them through TV, print, digital, content amplification, social media, direct marketing and search engine marketing. The campaign

reached new highs in Brazil, as research showed that target audiences subsequently expressed a higher intent to travel to Orlando than those who were not exposed to the ads.

Additionally, Alpha FM Radio from Sao Paulo came to Orlando to participate in Visit Orlando's weeklong live radio broadcast in April. The event achieved strong coverage and included a two-week promotion. Cooperative campaigns with key Brazilian tour operators kicked off during peak booking periods. The campaigns consisted of national and regional media and in-store advertising. E-newsletters are being delivered monthly with unique content on the destination.

### **Colombia Marketing Campaign**

The first flight of the Colombia marketing campaign wrapped at the end of June. The media consisted of digital, social media, direct marketing and search engine marketing. The campaign reached planned impressions and showed high engagement levels with social and content. Database efforts continue strong, and e-newsletters are delivered monthly with unique content on the destination.

### **United Kingdom Marketing Campaign**

Visit Orlando's spring campaign ensured Orlando was top of mind during this key booking time for 2017 summer sales. The call to action on the ads was designed to evoke a sense of urgency: "Book your Unforgettable 2017 Summer Holiday! It's not too late!" The integrated media schedule consisted of national TV, search engine marketing, online videos, digital display and social media advertising.

In addition, Tower FM broadcasted from our destination in May, highlighting all that is new and exciting this summer. The live remote was supported with outdoor advertising in markets covered by the broadcast.

E-newsletters were distributed in April and June to this audience, featuring outdoor dining, theme park expansions and offers from key Visit Orlando trade partners.

Initiatives continued to be implemented with key tour operators to provide additional exposure, drive sales and deliver value messaging to Visit Orlando consumers. These efforts included ads on the UK campaign landing page, listings in consumer e-newsletters and printed inserts with Orlando Holiday Guide requests.

### **Media**

<b>Advertising Campaigns</b>	<b>Impressions</b>	<b>Description</b>
Domestic Media Campaign	536,685,000	TV, Outdoor, Digital, Radio, Social Media, Search Engine Marketing, Display
United Kingdom Media Campaign	63,300,000	TV, Outdoor, Digital, Social Media, Search Engine Marketing
Brazil Media Campaign	149,017,000	TV, Print, Digital, Social Media, Search Engine Marketing

Brazil Tour Operator Co-op Campaigns	34,668,000	Print, Digital
Colombia Media Campaign	19,441,000	Digital, Social Media, Search Engine Marketing

**Global Website – VisitOrlando.com**

April - June	Q2 Results	Year-to-Date Results
Monthly Users	2,867,514	5,531,834
Total Page Views	10,084,026	20,465,572

**Direct Marketing**

**E-newsletters**

Market	Delivered	Open Rate	Click-Through Rate
United States Consumer	2,500,000	9.0%	8.0%
Florida Consumer	470,000	11.0%	10.0%
International Consumer	1,100,000	13.8%	9.3%

**Travel Industry Sales**

Travel Industry Sales activities were conducted in Brazil, Canada, China, Colombia, Mexico, Germany, India, Scandinavia, the Southern Cone (Argentina, Uruguay and Chile), United Kingdom and United States.

April - June	Q2 Results	Year-to-Date Results
Travel Professionals Trained (In-person and Online)	6,164	14,685
Travel Professional Events (Tradeshows, Missions, Destination Orientations, Sales Calls)	880	1,609
Travel Professionals Reached (During Travel Professional Events)	9,082	10,798

**GLOBAL COMMUNICATIONS**

The communications team took the concept of appreciating our visitors to unprecedented heights by achieving a GUINNESS WORLD RECORDS™ title for the most hand-written thank you cards collected in a 24-hour period. This event was part of announcing the 2016 record visitation number for Orlando at the May 11 industry luncheon, which celebrated two new records in one day. It kicked off a campaign that will last all year, thanking those who chose Orlando for their vacation. Media coverage for this event was generated in top-tier outlets that the Washington Post, Atlanta Journal-Constitution, NY Daily News and ABCNews.com.

Complementing the visitation announcement and new #OrlandosBigThankYou campaign, the team secured stories about new summer experiences and openings throughout the destination, landing coverage in a wide range of popular media outlets, including the New York Times, New York magazine, USA Today, FoxNews.com, Reader’s Digest, AAA Living and Palm Beach Post. The team also landed coverage on Travel Channel’s website for Orlando as a “Top 10 City for International Foods.”

On the international side, the team generated incredible results showcasing Orlando to Brazilians. In addition to landing a 10-page cover story in the top daily newspaper O Estado de Sao Paulo, Visit Orlando secured a feature article and six videos on the Estadão TV website, which has 43.6 million unique visitors. In the UK, we executed a successful radio day on BBC Radio, where more than 3 million listeners tuned in to a series of interviews that aired across 25 stations. Stories were also secured in notable media outlets such as the Daily Mirror and MSN UK, among others.

<b>January - March</b>	<b>Q1 Results</b>	<b>Year-to-Date Results</b>
<b>Impressions Public Relations</b>	1.6B	3.3B

### **Social Media**

Leveraging our Facebook, Twitter and Instagram channels, Visit Orlando achieved record-breaking reach of the 68 million visitation announcement on social media. Industry members and consumers were also excited to join the conversation to be part of setting the new world record for “thank you” cards.

These “owned media” efforts during the second quarter focused on continuing to grow our pipeline of blogs aimed at promoting Orlando to our domestic and international source markets. Since the first quarter, 65 new blog posts, including 22 in Portuguese (to serve our Brazilian source market) and 20 in Spanish (to serve our Latin America and Hispanic domestic markets) were created. These posts generated a total of 635,283 page views. Blog stories, videos and social content consisted of promotional efforts focused on “Bring on Spring” and “What’s New in Orlando” for the summer season, highlighting new attractions, eating destinations and even seasonal menus — all key areas of interest among destination visitors.

<b>April - June</b>	<b>Q2 Results</b>	<b>Year-to-Date Results</b>
<b>Impressions Paid + Organic Impressions (Facebook)</b>	18.0M	40.8M
<b>Visit Orlando Blog (Total Page Views)</b>	635,283	1.1M

## **CORPORATE COMMUNICATIONS**

### **Industry Communications**

Visit Orlando leveraged numerous platforms to communicate the value and perspective of tourism in the local community. Content was provided for a two-page monthly spread in i4 Business magazine, as well as a monthly article in the Florida Association of Destination Marketing Organization's Tourism Marketing Today. Topics during the second quarter included sustainability, the talent pipeline and Women in Business. Visit Orlando also produced seven issues of our weekly e-newsletter, Tourism Matters, during the second quarter, sharing tourism insights, news and activities with the community and members.

### **Community Outreach**

Visit Orlando conducted four presentations to business and community groups, educating them on the positive impact of the travel industry in Central Florida, as well as the role and activities of Visit Orlando. President & CEO George Aguel also presented at the Orange County Board of County Commissioners meeting and Tourist Development Council. Both presentations were broadcast live on Orange TV.

## **MEMBER RELATIONS**

The membership team held new networking and education programs that included 10 "Power Hours" (lunchtime events with guest speakers) and five "Member Meet-ups" (after-hours events with industry colleagues). Visit Orlando's business networking event at Pointe Orlando drew more than 600 participants and included a mobile app that encouraged members to share photos. And more than 900 members and community leaders attended Visit Orlando's Celebrating Travel & Tourism Luncheon, where they marked two record-breaking achievements: 68 million visitors in 2016 and setting the GUINNESS WORLD RECORDS™ title for "most greeting cards collected in 24 hours."

## **MEETINGS & CONVENTIONS (M&C)**

Orlando has topped Cvent's "Top Meetings Destination" list for a third year in a row. This designation comes from Cvent's evaluation of booking activity from more than 5,000 cities. Cvent is the leading online event management and planning company.

In the second quarter, the sales team booked 333,074 attendees at the Orange County Convention Center, a 19 percent increase over second quarter 2016. The team also booked 85,032 attendees for in-hotel business, a 26 percent decrease from this time last year. Both represented an economic impact for future years of more than \$775 million.

Several factors are affecting in-hotel attendee declines for Orlando, including second-tier cities offering concessions such as free transportation and lower rates than Orlando. Based on competitive data provided by Cvent, there is a national trend that includes cities such as Tampa, Fort Lauderdale, Jacksonville, Miami, Dallas, Las Vegas and Atlanta, which are also experiencing declines in room nights



booked. Our in-hotel sales team is placing additional focus in this area to raise our booking pace for the remainder of the year.

<b>April - June</b>	<b>Q2 Results</b>	<b>Year-to-Date Results</b>
	<b>2017</b>	<b>2017</b>
<b>Citywide Definite Attendance</b>	333,074	627,935
<b>Citywide Estimated Room Nights<sup>1</sup></b>	732,763	1,381,457
<b>In-Hotel Room Nights</b>	202,008	358,133
<b>In-Hotel Attendance</b>	85,032	169,764
<b>Hotel Leads</b>	605	1,239

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

### **Convention Center Key Bookings**

Several convention groups booked multiple years to the destination in the second quarter:

- International Association of Amusement Parks and Attractions: 35,000 attendees, November 2029 and 2030.
- Orgill: Dealer Meeting, 23,000 attendees, 2026 and 2027.
- The Helicopter Association International: Heli-Expo, 20,000 attendees, 2028 and 2032.
- Anita Borg: Grace Hopper Celebration of Women in Computing, 17,000 attendees, 2023 and 2024.

Key bookings for single years include:

- The Produce Marketing Association: 21,000 attendees, 2026.
- McDonald's: Worldwide Convention, 15,000 attendees, 2024.
- The National Safety Council: 14,000 attendees, 2024.
- The National Society of Black Engineers: 11,000 attendees, 2021.
- Workday: 10,000 attendees, 2019.

### **Direct Sales Activities**

Visit Orlando joined 12 of our members to conduct a destination orientation for 14 HelmsBriscoe meeting planners, showing them Orlando's unique meeting and event capabilities. These high-value planners — responsible for bringing potentially hundreds of meetings to Orlando — represent corporations, associations and pharmaceutical companies. In April, the convention sales team and participating members held a similar event for Houston-based meeting professionals.

For the fourth year in a row, Visit Orlando was awarded "Destination Partner of the Year" by ConferenceDirect. Orlando is the global meeting planning company's top destination.

Visit Orlando's business development team welcomed new prospects in May for a destination orientation. Participants from corporate, association, sports and specialty markets learned about Orlando by visiting

hotels and unique off-site venues. Companies represented included: American Probation and Parole, Belden, Claims Prevention and Procedure Council, Habitat for Humanity International, International Bullying Prevention, MAFO, National Association of Housing Cooperative, National BDPA, ClubCorp, Rev360, Road Runners Club of America, Waterstone Mortgage, and Youth for Christ.

Along with 19 members, Visit Orlando held a highly successful New York sales mission in June, attracting 69 meeting professionals from the New York/New Jersey area. Visit Orlando representatives were also part of the PCMA Education Conference in New York; they attended the hosted buyer luncheon with 25 meeting planners and conducted hosted buyer one-on-one appointments.

Visit Orlando attended Association Forum’s cornerstone event to celebrate the achievements of industry clients and present the “Inspiring Leader” award.

Activity	Total Number	Total Number of Participants/Attendees
Tradeshows	7	7,000
Missions	3	94
Client Events	1	800
Destination Orientations	2	27

### **Convention Marketing Update**

To maintain Visit Orlando’s position as the top meetings destination in the country, and to continue growing our group business leads for both citywide and in-hotel meetings and convention business, the organization ran two media campaigns targeting meeting professionals in the U.S. and Canada. These campaigns include the convention co-op media plan and non-citywide/brand media plan.

- The **convention co-op media plan** includes the “Orlando Destination Guide” insert, which runs across the top national meeting trade publications throughout the year. In addition, a comprehensive digital media schedule with shared online display banners from our co-op member partners and co-op emails are used to increase exposure for participating co-op members. The convention co-op insert ran in Meetings & Conventions magazine in April, PCMA’s Convene magazine in May, and Aspire magazine in June. Digital media banners in the second quarter drove clicks to our co-op member websites.
- The **non-citywide/brand media plan** promotes Orlando’s “in-hotel” meeting capabilities and new destination product offerings with print and strong digital national brand coverage. The plan launched in March and runs through November. In the second quarter, full-page meetings brand ads ran across the top trade magazines, including Meetings & Conventions, Successful Meetings

and the back cover of Meetings Today. In addition, Visit Orlando launched innovative new digital campaigns targeting meeting professionals on Facebook and LinkedIn.

**Destination Meeting Services**

In the second quarter, the destination services team conducted 80 client sites and client meetings, as well as 41 member sites and member meetings.

<b>April - June</b>	<b>Q2 Results</b>	<b>Year-to-Date Results</b>
<b>Service Leads Issued</b>	187	381