

## Strong First Quarter Carries the Momentum into 2018

Coming off a historic, record-breaking year for Orlando's tourism industry, our destination continued to build momentum with strong results in the first quarter of 2018. This was especially evident when examining hotel metrics such as occupancy, room night demand and average daily rate, all of which posted sizable year-over-year gains. As a result, tourist development tax revenue also increased significantly, with March being the county's largest monthly collection (\$30.8 million) in history.

On the marketing front, Visit Orlando launched our "Uniquely Orlando" campaign in key U.S. markets, generating higher impressions, site traffic, on-site conversions and revenue than the prior year. International campaigns targeted key planning and booking periods in our top three markets of Canada, the United Kingdom and Brazil.

To complement our marketing efforts, the global communications team participated in media missions in New York, London and Mexico City, where they pitched story ideas for spring and summer. We secured stories in the Chicago Tribune, New York Times and USA Today detailing Orlando's growing status as a foodie hotspot, landed broadcast coverage on major networks in Canada and Brazil, and generated endorsements from highly popular social influencers across the globe.

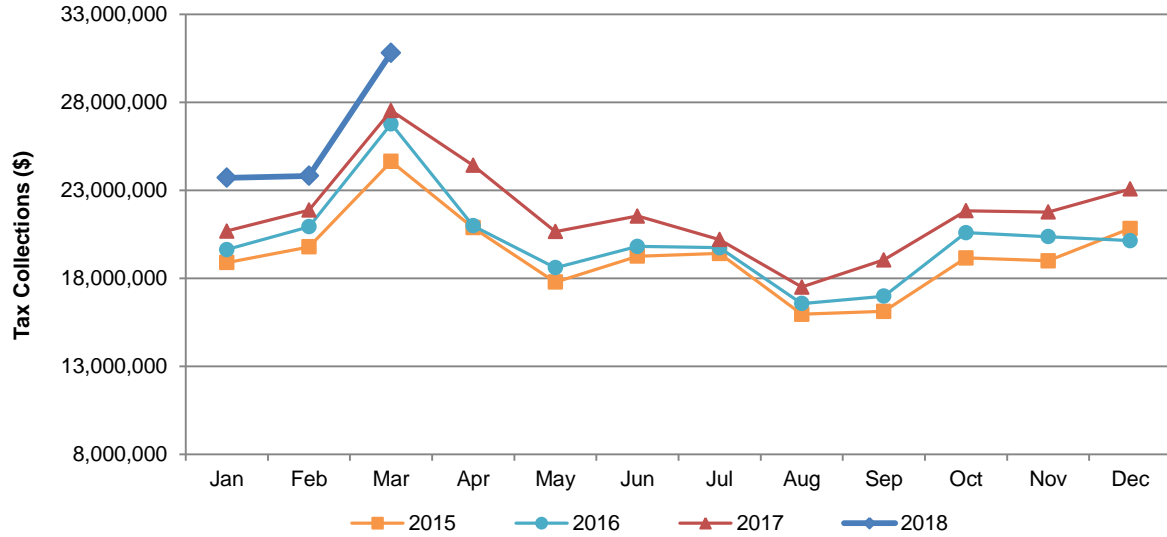
During the first quarter, Visit Orlando's convention sales team secured business that will bring nearly 500,000 attendees — representing almost \$1 billion in economic impact — to the Orange County Convention Center and Orange County convention hotels. Our convention marketing team continued to position Orlando as the country's top meetings destination, with extensive print and digital campaigns that drove traffic to our dedicated convention website and our partner websites.

As America's most visited destination, Orlando leads from the front. And at Visit Orlando, we're proud to provide the research, business insights, and destination sales and marketing efforts to keep our region's entire tourism industry running strong.

George Aguel  
President & CEO

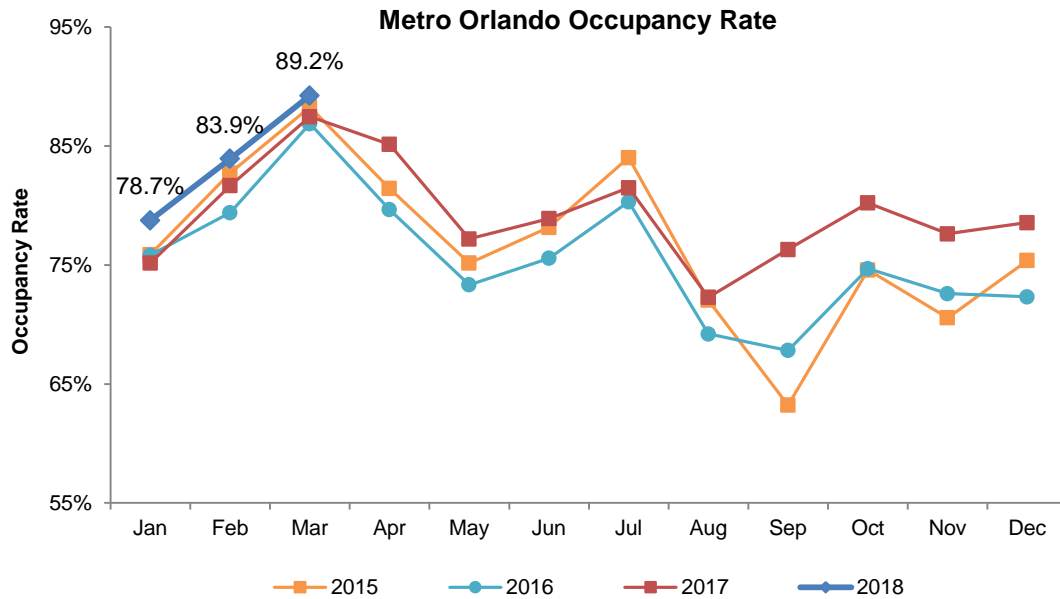
## INDUSTRY PERFORMANCE

### Orange County Tourist Development Tax Collections



### Metro Orlando Lodging Indicators

The following data are based on the January through March 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.



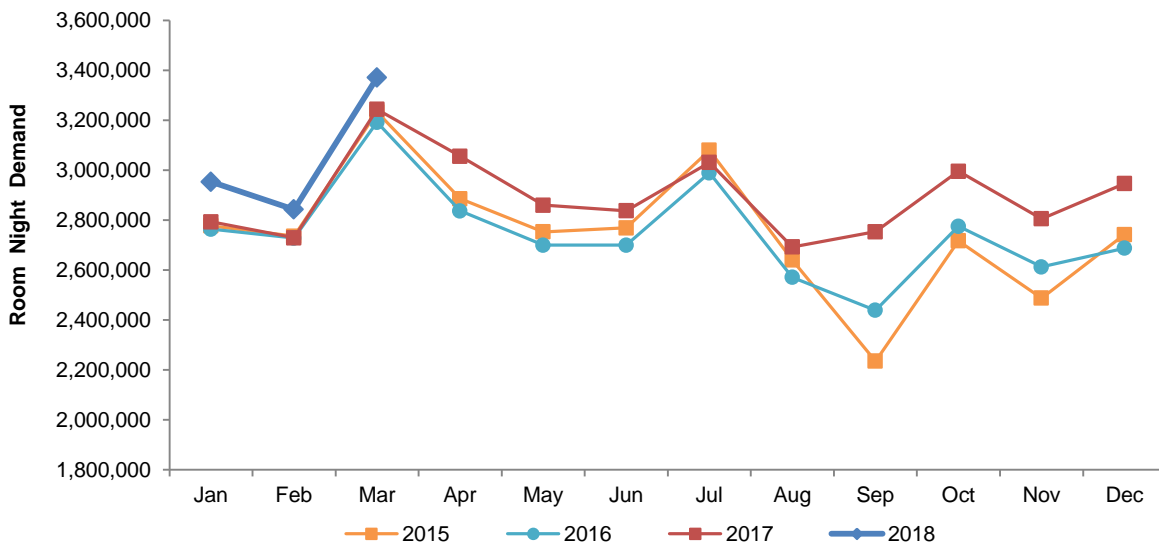
### Occupancy

	Q1 Results	Year-to-Date Results
	2018	2018
Orange County	85.5%	85.5%
Metro Orlando	84.0%	84.0%
Florida	79.5%	79.5%
National	61.6%	61.6%

### Average Daily Rate

	Q1 Results	Year-to-Date Results
	2018	2018
Orange County	\$152.88	\$152.88
Metro Orlando	\$143.09	\$143.09
Florida	\$170.88	\$170.88
National	\$127.37	\$127.37

### Metro Orlando Room Night Demand



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

	Q1 Results	Year-to-Date Results
	2018	2018
Supply <sup>1</sup>	10,917	10,917
Demand <sup>2</sup>	9,168	9,168

<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

The consumer marketing team launched major integrated marketing campaigns in key markets, engaged broadcast crews from New York, Philadelphia and Canada, and sent monthly consumer newsletters to eight key markets.

#### **United States Marketing Campaign**

The first quarter of 2018, the consumer marketing team launched a campaign centered on an “Enter to Win” family sweepstakes and showcased the unique experiences only Orlando can offer. The “Uniquely Orlando” campaign ran in key out-of-state markets including New York, Philadelphia and Atlanta, as well as the strategic Florida markets of Tampa, Miami, West Palm Beach and Jacksonville. Running across digital and traditional media channels, some of the most notable “Uniquely Orlando” campaign implementations included:

- An interactive outdoor experience and digital spectacular units in New York City.
- Broadcast promotions with NBC in New York and ABC in Philadelphia.
- High-impact digital display units across all key markets.
- Strategic multichannel efforts in both display and paid social.

In fewer than eight weeks, Visit Orlando received more than 50,000 opt-in leads. Overall, the campaign was a success, delivering higher impressions, site traffic, on-site conversions and revenue than the prior year.

#### **Brazilian Marketing Campaign**

The Brazilian marketing campaign launched early March with national TV, print, digital display, social media, content amplification and search engine marketing. The campaign focuses on keeping Orlando top of mind during key planning and booking periods. Content amplification efforts continue to drive highly engaged Brazilian consumers to Orlando’s latest news in the Portuguese-language blog on Visit Orlando’s Brazil website.

Visit Orlando continues to expand its database to deliver e-newsletters to subscribers every month. The broadcast and promotions team hosted a crew from Food Network Brazil to film a series of TV segments showcasing Orlando’s unique and ever-growing dining options. Filming spanned three days and featured 10 area restaurants ranging from five-star dining establishments to local chef-owned favorites. The segments began airing on the popular Food Network Brazil in late April, as well as across the station’s social media channels for the remainder of the year.

### **Canadian Marketing Campaign**

During the first quarter, Visit Orlando launched its first fully integrated advertising campaign in Ontario with the goal of capturing more spring and summer visitors. The campaign included TV, digital and social media to coincide with the two- to six-month key booking period for Canadians. In addition, the Visit Orlando "Never Ending Story" brand spot was shown in select movie theaters. Due to the success of our fall campaign, Visit Orlando once again placed outdoor advertising. Canadians commuting to downtown Toronto saw branding messages throughout the busy Bay Street subway terminal and Brookfield Place, as well as signage at multiple subway stops along the way. A prominent broadcaster from The Weather Network also created 30 one-minute destination segments that aired twice during the first week of February, resulting in 60 minutes of coverage. Following the campaign's completion March 11, Visit Orlando continued to run search engine optimization and social efforts, which generated almost 118 million impressions.

### **United Kingdom Marketing Campaign**

Generating more than 218 million impressions, Visit Orlando's winter campaign in the United Kingdom and Ireland encouraged families to choose Orlando during this peak booking period. The winter ad tracking study showed the campaign continued to drive awareness, posting another solid gain in "intent to visit" compared to the 2017 ad tracking study. Visit Orlando advertising was well-received, with high likability and positive perceptions of Orlando as a holiday destination.

Ongoing database acquisition efforts increased the UK and Ireland consumer databases to more than 245,000 subscribers, and e-newsletters were distributed monthly from January through March. Key messages that influence selection of Orlando as a travel destination included theme park events, value, relaxation, dining and offers from key Visit Orlando trade partners.

Programs continued to be implemented with key travel trade partners in the UK and Ireland to provide additional exposure, while also providing value messaging to Visit Orlando consumers. Initiatives included advertising on the UK and Ireland campaign landing pages and offer listings in consumer e-newsletters.

### **Media**

<b>Advertising Campaigns</b>	<b>Impressions</b>	<b>Description</b>
U.S.	546,900,000	TV, Radio, Outdoor, Digital Display, Social Media, Search Engine Marketing
UK/Ireland	218,000,000	TV, Outdoor, Digital Display, Social Media, Search Engine Marketing
Canada	117,844,000	TV, Outdoor, Digital Display, Social Media, Search Engine Marketing
Brazil	18,400,000	TV, Print, Digital Display, Social Media, Search Engine Marketing

## Global Website – VisitOrlando.com

January - March	Q1 Results	Year-to-Date Results
	2018	2018
Monthly Sessions	4,200,000	4,200,000
Total Page Views	8,517,000	8,517,000

## Direct Marketing

### E-newsletters

Market	Delivered	Open Rate	Click Through Rate
United States Consumer	4,892,475	12.0%	9.2%
Florida Consumer	834,885	14.9%	8.7%
International Consumer	1,715,572	18.4%	10.1%

## Travel Industry Sales

January - March	Q1 Results	Year-to-Date Results
	2018	2018
Travel Professionals Trained (In-person and Online)	6,477	6,477
Travel Professional Sales Calls	1,254	1,254
Travel Professional Events (Tradeshows, Missions, Destination Orientations)	20	20

## GLOBAL COMMUNICATIONS (Publicity & Social Media)

Communications ended the first quarter with more than 1.2 billion global publicity impressions and 23.3 million social media impressions on our Visit Orlando channels. Our first quarter communications focused on several key messages to encourage booking Orlando vacations during key planning cycles, maintaining top-of-mind awareness and new reasons to visit.

**Promoting Orlando Dining:** A trio of national media stories generated by the public relations team continues to raise awareness of Orlando as a foodie hotspot, including the New York Times, USA Today and Chicago Tribune. The Chicago Tribune's story, *"Away from the theme parks, Orlando area offers dining thrills"* took readers on a culinary journey by featuring 18 local restaurants and businesses. The article was also picked up by other Tribune publications, including the Hartford Court, South Florida Sun-Sentinel and even Orlando Sentinel. Throughout the first quarter, Visit Orlando worked to secure similar coverage in the New York Times (*"36 Hours in Orlando"*), USA Today (*"Standout suburban dining destinations"*) and many other outlets spanning print, digital, social and broadcast. In addition to our

unique dining options, these stories spotlight Orlando beyond the parks, including dozens of small attractions, boutique hotels, outdoor adventures, museums and cultural offerings.

**Key Market Media Missions:** To build new or strengthen relationships with key media in key markets, the team participated in events in New York, London and Mexico City to pitch upcoming stories for spring and summer. In London and New York, numerous appointments were held by our in-market teams, while in Mexico City the Visit Orlando public relations team participated in a joint mission with travel industry sales to host a media brunch and one-on-one appointments. To date, the Mexico mission resulted in commitments for 20 stories on Orlando that will garner 17.8 million impressions.

**International Broadcast Coverage:** The Visit Orlando team focused on securing long-form television stories in key international markets to tell a complete story of all that Orlando offers. During the prime booking window for Canadian visitors, the public relations team landed five segments on four different Canadian broadcast shows: CHCH Morning Live, Breakfast Television, The Weather Network and CTV Ottawa Morning Live. In Brazil, the team secured seven episodes of broadcast coverage dedicated to Orlando. The shows included CVC's To de Férias, Viagens ao Redor do Mundo on Band TV, Viagem Cultural on RedeTV and Planeta Brazil.

**Influencer Endorsements:** In the first quarter, the public relations team continued to extend its reach of third-party endorsements to include social media influencers in the key markets of Canada, Brazil and the UK. Two top-tier Canadian lifestyle and travel influencers, Kerina Mango and Audrey-Anne Jean, published a series of social posts across Instagram, reaching more than 600,000 followers. The team worked with five Brazilian social influencers (combined reach exceeding 7.5 million) to showcase the destination through daily posts to their loyal followers. These influencers included Lucas Rangel, Valentina Schulz, Ivana Coelho, Maria Suconic and actor Andre Bankoff. In the UK, the public relations team worked with popular millennial influencer Scarlett London to generate nearly 1 million impressions on her blog and social channels, and then had her host a "takeover" of Visit Orlando's Instagram. The influencer showcased sunny outdoor activities to counter "Blue Monday," which is known in the UK as "the most depressing day of the year." London's trip coincided with a key booking period in the UK.

**Travel Industry News:** In addition to consumer media, the public relations team aims to land steady coverage in travel industry media outlets to keep Orlando top of mind with trade clients. During the first quarter, the team generated more than 150 stories covering topics such as new agency partners, new openings in 2018 and Visit Orlando's launch of an upgraded online training academy. Coverage appeared broadly throughout key markets, including the U.S., Canada, UK, Mexico, Brazil, China, India and the Middle East.

**Social media content:** We continue to elevate content on the Visit Orlando social media channels, including Facebook, Twitter and Instagram, with a focus on promoting unique things to see and do around

Orlando. To increase engagement from visitors, and reinforce authentic experiences, we have expanded our use of user-generated content across all channels with great success. The popularity of this user-generated content, as well as our increased use of videos, allowed us to still maintain strong organic (unpaid) reach on Facebook, despite recent news feed changes that make it more difficult for brands to achieve. This quarter, we created 15 posts on Facebook that reached approximately 100,000 or higher in unpaid impressions. The most popular content was a “What’s New” video that reached nearly 500,000 organic, unpaid impressions.

#### Global Publicity

January - March	Q1 Results	Year-to-Date Results
	2018	2018
<b>Impressions Public Relations</b>	1.2B	1.2B

#### Social Media

January - March	Q1 Results	Year-to-Date Results
	2018	2018
<b>Impressions Paid + Organic Impressions (Facebook)</b>	23.3 M	23.3M
<b>Visit Orlando Blog (Total Page Views)</b>	476,620	476,620
<b>Visit Orlando Followers from Facebook, Twitter &amp; Instagram</b>	Secured 1,522 new followers	Secured 1,522 new followers

## INDUSTRY COMMUNICATIONS

Visit Orlando leveraged numerous platforms to communicate the value and perspective of tourism in the local community. Content was provided for two-page monthly spreads in i4 Business magazine, with the themes of forecasting economic trends for our industry, construction projects driving tourism growth, and a “women in business” profile on GOAA’s Carolyn Fennell. We produced six issues of our e-newsletter Tourism Matters — which shares tourism insights, news and activities with the community and members — and published our three-year strategic plan (“Tourism 2020”). Throughout the quarter, we also promoted important corporate and industry news with regular posts to our LinkedIn account.

Visit Orlando conducted presentations to business and community groups including the American Marketing Association, Florida Attractions Association and Premium Outlets, among others, educating them on the positive impact of the travel industry in Central Florida. COO & CFO Larry Henrichs also presented to the Orange County Tourist Development Council, which was broadcast live on Orange TV.

We accepted a record number of applications to be selected as the charity recipient for Visit Orlando’s 2018 Magical Dining Month program, where one dollar from every meal goes back to the Central Florida



community. An unprecedented 72 applications from local nonprofits that benefit children and families were received. The selection process is underway.

## MEMBER RELATIONS

The membership team launched its 2018 events schedule with numerous opportunities for members to learn and develop significant business connections. During the first quarter, there were nine events: three member orientations, four “Power Hour” lunches — including presentations by I-Drive 360 and the Greater Orlando Aviation Authority — one Member Meet-Up, and a record-setting 12<sup>th</sup> annual signature networking event highlighting eight venues at Pointe Orlando. These events collectively drew 1,231 registrants representing 459 companies.

## MEETINGS & CONVENTIONS (M&C)

Visit Orlando secures two types of M&C business: that which is hosted in the Orange County Convention Center (aka “citywide”) and that which is hosted in Orange County hotels (aka “in-house”).

### M&C Sales Performance

**Citywide:** In the first quarter, the sales team secured future meetings and conventions with an estimated 295,536 attendees for the Orange County Convention Center, which will generate \$582 million in economic impact.

**In-House:** Also in the first quarter, the sales team secured future meetings and conventions with an estimated 102,786 attendees for Orange County hotels, which will generate \$149 million in economic impact.

### Citywide Production

January - March	Q1 Results	Year-to-Date Results
	2018	2018
<b>Future Attendance<sup>1</sup> Secured</b>	295,536	295,536
<b>Estimated Room Nights<sup>2</sup></b>	650,179	650,179

<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

January - March	Q1 Results	Year-to-Date Results
	2018	2018
<b>Future Attendance<sup>1</sup> Secured</b>	102,786	102,786
<b>Hotel Room Nights</b>	197,441	197,441

<b>Hotel Leads</b>	712	712
--------------------	-----	-----

**Citywide Sales Key Bookings**

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

- MegaCon: 68,920 attendees, May 2019
- Professional Golfers Association: 43,000 attendees, January 2029
- Workday Rising: 10,250 attendees, September 2022
- Educause: Annual Conference, 7,500 attendees, October 2027
- Walker Stalker: Walker Stalker Con, 6,000 attendees, August 2018
- Moose International: Annual National Summer Convention, 5,000 attendees, July 2022

**In-House Key Bookings**

Key hotel bookings in the first quarter include:

- National Association for Bilingual Education: Annual International Education Conference, 2,500 attendees, February 2019
- Modere: Modere Spring/Fall Regionals, 2,000 attendees, April 2018
- Orangetheory Fitness: 2,000 attendees, October 2019
- American Psychiatric Nurses Association: APNA Annual Conference, 1,900 attendees, October 2020
- American Association for the Treatment of Opioid Dependence: 1,900 attendees, October 2019
- The Beryl Institute: The Beryl Institute Patient Experience, 1,800 attendees, April 2020

**Direct Sales Activities**

<b>Activity</b>	<b>Total</b>	<b>Participants/Attendees</b>
<b>Tradeshows</b>	6	4,300
<b>Missions</b>	1	25
<b>Client Events</b>	1	55

- Visit Orlando attended the Professional Convention Management Association's annual Convening Leaders meeting in Nashville Jan. 7-10. We hosted 55 top association and corporate clients at a special luncheon with the Orange County Convention Center and several other members. Those in attendance learned about new developments in the destination, as well as top reasons to host a convention in Orlando and unique opportunities for event planners.
- Visit Orlando and participating members networked and conducted one-on-one meetings with clients at the Religious Conference Management Association tradeshow in Omaha Jan. 30-Feb. 1. In addition, Visit Orlando and its members hosted a private event for 20 key clients,

showcasing everything our destination has to offer.

- Visit Orlando's convention sales team attended the Destination Showcase in Washington, D.C., Feb. 13. The event focused on how to work with convention and visitor bureaus to achieve successful meetings, and it enabled Visit Orlando to meet with key association, corporate and government meeting professionals.
- Visit Orlando met with more than 75 qualified customers during the CBI Pharmaceutical Summit in Philadelphia March 25-28. Members were able to connect with existing customers and forge relationships with new customers, providing future opportunities for Orlando.

### **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 non-citywide meetings and convention business — we ran two trade media campaigns targeting meeting and convention organizers in the U.S. and Canada. These campaigns included the convention cooperative media plan and non-citywide/brand media plan.

- The **citywide cooperative media plan** runs January through December and includes the 24-page [Orlando Destination Guide](#) custom cooperative insert, which runs across nine of the top national meeting trade publications. In addition, a comprehensive digital media schedule with shared online display banners from our member partners and emails are used to increase exposure. In the first quarter, our Orlando insert dropped in ASAE's Associations Now, MPI's The Meeting Professional, Meetings Today and Prevue magazines. In addition, digital banners ran on ad networks like Tribal Fusion, Northstar Meetings Network, ASAEcenter.org and MPIweb.org, driving significant traffic to our partner websites.
- The **in-house (non-citywide) brand media plan** promoted Visit Orlando's "in-house" hotel meeting capabilities, as well as new destination product offerings, with print and heavy digital national brand coverage. The campaign launched in February and runs through December. In the first quarter, full-page meetings destination ads ran across the top trade magazines including PCMA's Convene, Meetings & Conventions, Successful Meetings, Meeting Mentor, Corporate and Incentive Travel and Black Meetings & Tourism magazines. Additionally, we kicked off our digital efforts in March with top-performing ad networks, high-profile video banners on trade sites, value email broadcasts, and paid social targeting meeting professionals. The non-citywide/brand campaign delivered 7.7 million print and digital impressions in Q1 2018, resulting in 19,278 visitors to our meetings website – [www.Orlandomeeting.com](http://www.Orlandomeeting.com) – with an above average click-through rate of 29 percent.

**Destination Meeting Services**

<b>January - March</b>	<b>Q1 Results</b>	<b>Year-to-Date Results</b>
	<b>2018</b>	<b>2018</b>
<b>Service Leads Issued<sup>1</sup></b>	177	177

<sup>1</sup> 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.