

## Orlando Celebrates Another Record: 72M Annual Visitors

Welcoming a historic 72 million visitors in 2017, Orlando retained its long-held title of America's most-visited destination — and Visit Orlando was proud to share the news at our annual Celebrating Travel & Tourism Luncheon. Our announcement generated more than 1,200 stories and 1.21 billion global impressions, which equates to being in the New York Times, Wall Street Journal and USA Today every day for more than a year. This marks the first time any U.S. destination has surpassed 70 million visitors.

Halfway through 2018, Orlando is experiencing its highest occupancy rate in more than 20 years. Record levels of hotel demand (rooms sold) and average daily rate have combined to push Orange County Tourist Development Tax collections to unprecedented levels. The airport is setting records too, with passenger traffic up 6.7 percent over the first half of last year. Although the Convention Center reported first-half attendance down 13 percent from this time last year, this was expected, and attendance at OCCC in the second half of 2018 is projected to surpass the second half of 2017.

At Visit Orlando, our “Uniquely Orlando” campaign continued to drive awareness and visitation in targeted markets along the East Coast, and our publicity team worked to generate positive coverage in media outlets such as USA Today, the Associated Press, Chicago Tribune, Miami Herald and Forbes Travel Guide. International efforts included a global radio broadcast from Orlando, as well as partnering with 28 member companies at IPW, the tourism industry's premier international tradeshow and largest generator of travel to the U.S. On the conventions side, the sales team secured business that will result in 466,060 attendees and \$833 million in economic impact over the next 11 years.

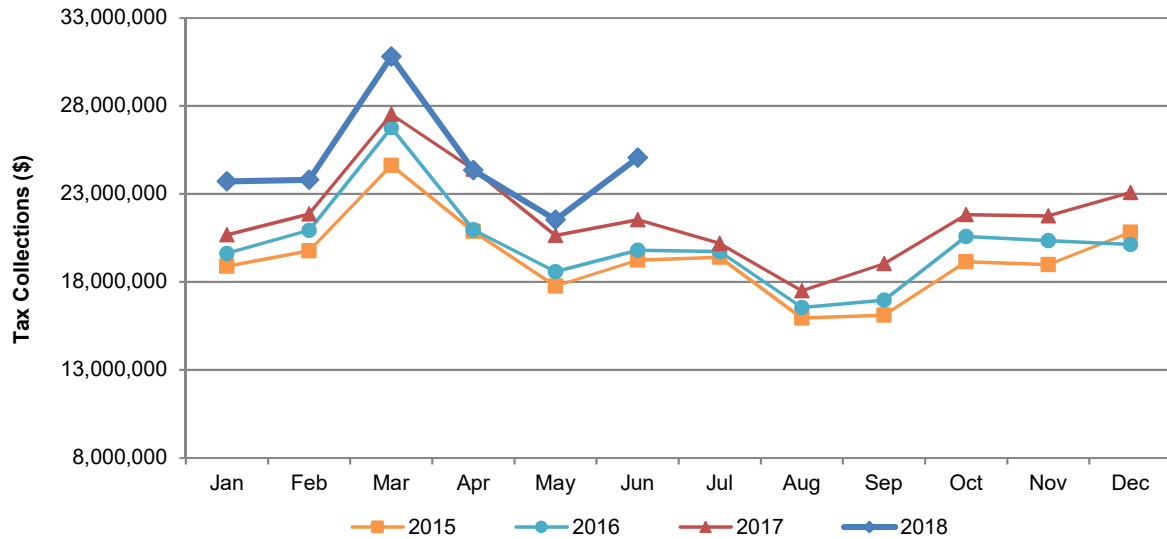
Finally, two highly deserving local charities, Best Buddies and the Down Syndrome Association of Central Florida, were selected to receive proceeds from Visit Orlando's 13<sup>th</sup> annual Magical Dining Month. This year's event takes place Aug. 24-Sept. 30.

Looking ahead, our research indicates that Orlando's momentum should continue to build across many sectors of the travel industry. The positive effects will ripple throughout our entire community and provide hope for yet another banner year in 2018.

George Aguel  
President & CEO

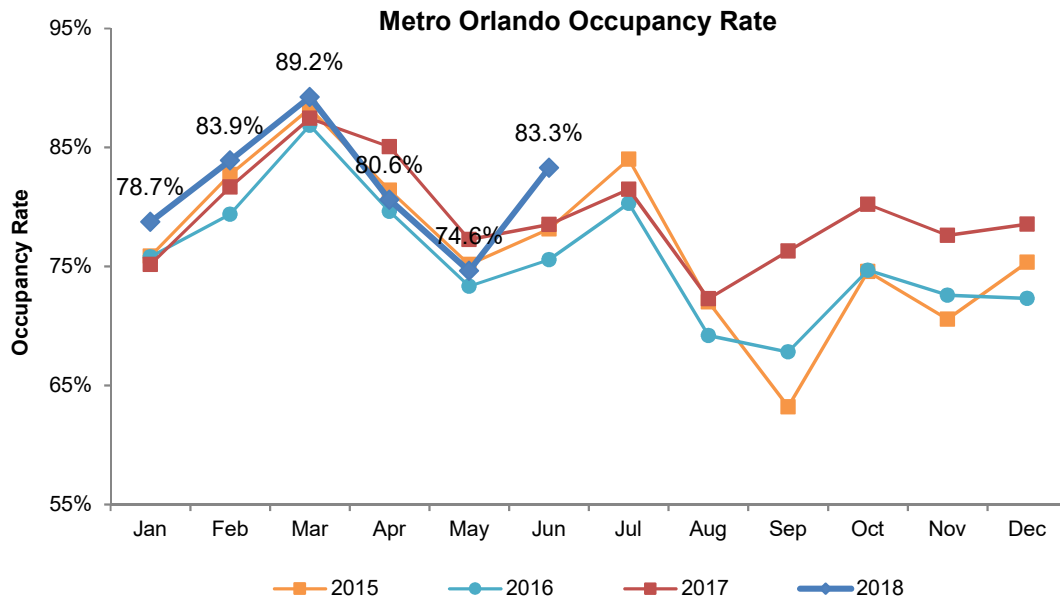
## INDUSTRY PERFORMANCE

### 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.



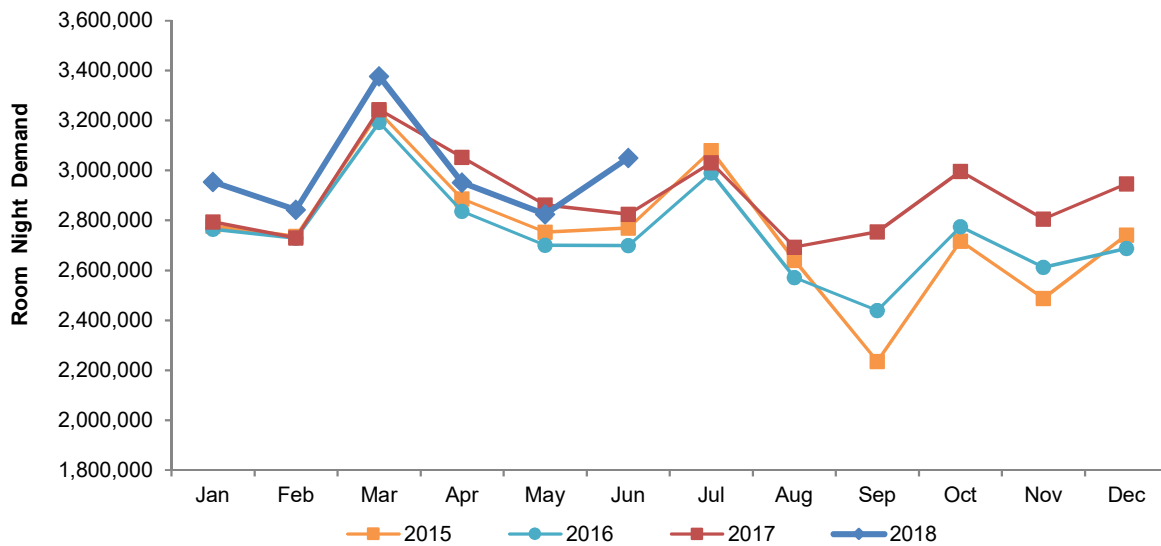
### Occupancy

	Q2 Results	Year-to-Date Results
	2018	2018
<b>Orange County</b>	82.1%	83.8%
<b>Metro Orlando</b>	79.4%	81.7%
<b>Florida</b>	74.6%	77.0%
<b>National</b>	70.2%	65.9%

### Average Daily Rate

	Q2 Results	Year-to-Date Results
	2018	2018
<b>Orange County</b>	\$136.34	\$144.42
<b>Metro Orlando</b>	\$128.40	\$135.67
<b>Florida</b>	\$141.91	\$156.59
<b>National</b>	\$131.00	\$129.36

### Metro Orlando Room Night Demand



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

	Q2 Results	Year-to-Date Results
	2018	2018
<b>Supply<sup>1</sup></b>	11,112	22,036
<b>Demand<sup>2</sup></b>	8,827	18,003

<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**

The second quarter of 2018 followed a very strong spring campaign that ran from January through March. To help extend the campaign's success, we continued to run digital media to drive a steady stream of website visitation, email opt-ins, attraction ticket purchases and other key metrics. The goal was to keep Orlando top of mind among consumers and, ultimately, drive domestic visitation from top-producing out-of-state markets (New York area, Philadelphia and Atlanta) and key Florida markets (Tampa, Miami, West Palm Beach and Jacksonville). The team continued to leverage "Uniquely Orlando" creative and the "Win a Trip" sweepstakes promotion as the main messaging anchor, resulting in high levels of opt-ins, website visitation and engagement on VisitOrlando.com.

#### **Brazilian Marketing Campaign**

The first half of the Brazil marketing campaign, which wrapped at the end of June, focused on reaching key target demographics through national traditional cable TV on such networks as FOX, Sony and Food Network, as well as travel magazines, digital and social media. Our ongoing content marketing strategy helped delivered relevant and engaging information about our destination while focusing on topics important to the Brazilian audience. Search engine marketing (SEM) runs throughout the year. Monthly e-newsletters continue to engage 242,000 unique subscribers. In addition, a cooperative campaign with a key Brazilian tour operator kicked off with national media and in-store advertising.

#### **Canadian Marketing Campaign**

In Canada, advertising through social and search engine marketing continued through the second quarter. Social posts included stories on value, dining, relaxation and what's new. To increase exposure, Visit Orlando also worked with Canadian tour operator TravelBrands and its retailer Sunquest.ca. The plan included a digital campaign with video spots in several Tim Hortons restaurants and high-traffic office building concourses. The video promoted a \$100 savings when booking an Orlando vacation.

#### **United Kingdom Marketing Campaign**

Visit Orlando launched a spring campaign in the UK and Ireland that generated more than 60 million impressions to ensure Orlando was top of mind during the April/May key booking period. The integrated media schedule consisted of national digital coverage, with TV and outdoor in Scotland, as Scotland is one of the largest regions for our core family market. The advertising call to action evoked a sense of urgency: *Book your unforgettable 2018 summer holiday today. It's not too late!* In addition, Bauer Radio featured an on-air promotion across five stations in Scotland from April 23-May 4, encouraging listeners to enter to win one of 30 trips to Orlando, in partnership with Barrhead Travel. The winner's trip is scheduled for early August, which will generate additional exposure for our destination. In our UK and

Ireland consumer e-newsletters, initiatives continued to be implemented with key trade partners to provide additional exposure, drive sales and provide value messaging.

### **Global Radio Broadcast**

Visit Orlando's annual radio broadcast took place April 30-May 4, as 15 stations from around the globe descended upon Orlando. Radio personalities enjoyed all that is new and exciting in the destination, then shared their experiences on air the following morning. Stations from New York, Atlanta and Philadelphia broadcasted for three days, while international stations from Brazil, Scotland and Canada broadcasted for five days. The program, which had a sweepstakes overlay and on-air promotion that ran for an additional three weeks, brought in more than 42 million impressions.

### **Media**

<b>Advertising Campaigns</b>	<b>Impressions</b>	<b>Description</b>
United States	220M	Digital Display, Social Media, Search Engine Marketing
Brazil	142M	TV, Print, Digital Display, Social Media, Content Amplification, Search Engine Marketing
Canada	6.52M	Social Media, Search Engine Marketing
United Kingdom/Ireland	65.4M	TV, Radio, Outdoor, Digital Display, Social Media, Search Engine Marketing

### **Global Website – VisitOrlando.com**

<b>April - June</b>	<b>Q2 Results</b>	<b>Year-to-Date Results</b>
	<b>2018</b>	<b>2018</b>
<b>Monthly Sessions</b>	3.4M	7.59M
<b>Total Page Views</b>	7.49M	16M

### **Direct Marketing**

#### **E-newsletters**

<b>Market</b>	<b>Delivered</b>	<b>Open Rate</b>	<b>Click Through Rate</b>
<b>United States Consumer</b>	6.9M	8.6%	7.3%
<b>Florida Consumer</b>	1.16M	11.1%	8.7%
<b>International Consumer</b>	2.25M	15.7%	13%

### **Travel Industry Sales**

Visit Orlando partnered with our member companies to showcase our destination to international travel buyers across the globe at IPW, the industry's premier international tradeshow and the largest generator

of travel to the United States. In just three days of intensive, pre-scheduled business appointments, more than 1,000 U.S. travel organizations were on site to meet with nearly 1,300 international and domestic buyers from more than 70 countries, conducting business that would otherwise be generated only through an exhaustive number of around-the-world trips. Visit Orlando was well-represented with a Member Village that featured 28 of our member companies. The travel industry team conducted 223 meetings with key clients and our public relations team also met with 60 media outlets from top markets, providing updates on our destination and seeding ideas for future stories about our destination. Based on market intelligence and client feedback, Visit Orlando's global footprint is well-situated to continue to drive international leisure visitation.

In addition, travel industry sales and marketing activities for the second quarter included the following markets: Argentina, Brazil, Canada, Chile, China, Colombia, Continental Europe, India, Middle East, Mexico, UK/Ireland and the United States.

<b>April - June</b>	<b>Q2 Results</b>	<b>Year-to-Date Results</b>
	<b>2018</b>	<b>2018</b>
<b>Travel Professionals Trained</b> (In-person and Online)	9,919	16,396
<b>Travel Professional Sales Calls</b>	1,304	2,558
<b>Travel Professional Events</b> (Tradeshows, Missions, Destination Orientations)	31	44

### **GLOBAL COMMUNICATIONS (Publicity, Social Media, Content)**

In the second quarter, the public relations team was heavily focused on communicating the organization's biggest announcement of the year, the annual visitation number of 72 million guests in 2017. This helped secure awareness for Orlando's ongoing success as America's most-visited destination, further reinforcing our appeal to consumers. From a leisure consumer standpoint, Visit Orlando secured media coverage and created content for social and online platforms that communicated key messages such as what's new, value and quality dining, while concentrating on key markets during important planning and booking periods. For the meetings and convention industry, stories that promoted Orlando's strengths and offerings were secured in trade media.

#### **Tremendous Visitation Announcement Publicity**

More than 1,200 stories across print, digital and broadcast media spread the word that Orlando was, once again, America's most-visited destination. The team landed a record number of media to attend the May 10 announcement luncheon, including not only local print, broadcast and influencer media, but national outlets such as CBS News, USA Today.com and Forbes Online. Coverage extended globally to our top international markets of Canada, the UK and Brazil, as well as to emerging markets in Asia and the

Middle East. Overall, our visitation announcement generated 1.21 billion impressions across traditional and social media, which equates to being in the New York Times, Wall Street Journal and USA Today every day for more than a year.

### **US Consumer Publicity**

Throughout 2018, Visit Orlando has focused publicity efforts on generating coverage in key national and regional media outlets, resulting in 1.5 billion impressions in the second quarter alone. Highlights include:

- The Associated Press writing about how Orlando is leading the way in new theme park offerings, using the news hook of 72 million visitors in 2017. The story appeared in more than 180 outlets across the country.
- USA Today Travel publishing 10 Orlando-focused feature stories covering a wide range of vacation tips, dining options and places to visit.
- A story in the Chicago Tribune, Miami Herald, Orlando Sentinel and 33 additional outlets that highlighted Orlando's best dining thrills outside the theme parks. The coverage helped broaden the perspective of Orlando as a dining destination.
- Livability magazine naming Orlando the top vegan-friendly city in the U.S. and Forbes Travel Guide writing "An Adult's Guide to Orlando Fun."

### **Meetings and Convention Publicity**

In addition to broader destination updates, Visit Orlando's record-breaking visitation announcement was covered by several trade outlets including USAE, Successful Meetings and Black Meetings & Tourism. This spring, the team arranged for the first M&C media destination orientation in two years, with participants from M&C, PCMA Convene, Smart Meetings, Prevue and Meetings Today. As a result, destination stories are expected to run in each of these outlets.

### **Brazilian Media Share Their Love of Orlando**

In the second quarter, Visit Orlando worked with several Brazilian media and influencers, helping them experience our destination's diversity in attractions, activities and quality dining. Entertainment outlet Vírgula and travel magazine Viajar pelo Mundo came to Orlando, along with four prominent influencers who reach millions of followers. Combined, their coverage has generated more than 100 million impressions in news articles, blogs, videos and social posts.

### **UK Value Campaign/PR Survey**

Visit Orlando's public relations team created a custom survey regarding travel habits of British families to generate media attention on messages important to the UK, including the value of an Orlando vacation and how Visit Orlando can help with travel plans. The team promoted results from the survey through a 14-station radio day where a travel journalist and "mummy" blogger helped discuss findings. Visit

Orlando's press release also generated publicity in major UK publications, including The Sun, The Independent, Travel Weekly and the Mirror. Overall, the campaign resulted in 45 million impressions.

April - June	Q2 Results	Year-to-Date Results
	2018	2018
<b>Impressions Public Relations</b>	2.36B	3.58B

### Content

The content team posted 70 videos and 41 new or updated stories to Visit Orlando's consumer blog, with popular topics including [summer thrills](#), the rebranded [ICON Orlando](#), top reasons to visit [Disney Springs](#), and dining and nightlife in Orlando's [Main Street](#) districts. Seven new pages were created on VisitOrlando.com, while 50 others were updated to ensure the website contained timely news and information.

### Social Media

More than 825 pieces of social media content focused on things to do in Orlando were published in the second quarter on Visit Orlando's Facebook, Instagram and Twitter channels, and we continued to build our base of followers, which is now at 1.57 million consumers. Follower growth this quarter was largest on Instagram (7 percent), followed by Facebook (2.7 percent) and Twitter (1.6 percent).

April - June	Q2 Results	Year-to-Date Results
	2018	2018
<b>Impressions Paid + Organic Impressions</b> (Facebook)	28M	52.6M
<b>Visit Orlando Blog</b> (Total Page Views)	418,686	895,306
<b>Visit Orlando Followers</b> (Facebook, Twitter, Instagram)	Secured 45,966 new followers	1.57M total followers

### Industry Communications

Visit Orlando leveraged numerous platforms to communicate the value and perspective of tourism in the local community. Content regarding the positive impact of tourism was provided for two-page monthly spreads in i4 Business magazine, seven issues of our community and industry e-newsletter Tourism Matters and in regular posts on LinkedIn.

Visit Orlando conducted presentations to business and community groups including HelmsBriscoe, Central Florida Hotel & Lodging Association, Rosen College and member partners, educating them on the positive impact of the region's travel industry. President & CEO George Aguel also presented to the Orange County Tourist Development Council and Orange County Board of County Commissioners, both of which were broadcast live on Orange TV.



After receiving a record number of applications for Visit Orlando's Magical Dining Month sponsored by American Express, we are pleased to announce that two local nonprofits will receive donations raised through the program (\$1 from each meal served). Best Buddies creates opportunities for inclusion and one-to-one friendships for people with intellectual and developmental disabilities, and proceeds from Magical Dining Month will help expand its programs into Orange County middle schools. The Down Syndrome Association of Central Florida offers hope, acceptance and empowerment for all individuals with Down syndrome and their families. Proceeds from Magical Dining Month will help the Down Syndrome Association expand its emergency and crisis fund, pay for potential medical needs not covered by insurance, and fund therapy scholarship programs. Visit Orlando is honored to have these two organizations join us for Magical Dining Month, which runs Aug. 24-Sept. 30.

## **MEMBER RELATIONS**

The membership team continued delivering education and business networking opportunities for members to make meaningful business connections. In the second quarter, the team held three new member orientations, two "Power Hour" lunches — including presentations by the Dr. Phillips Center and Sanford Orlando International Airport — two Member Meet-Ups and a record-setting Celebrating Travel & Tourism Luncheon featuring Jonathan Tisch, chairman & CEO of Loews Hotels, and Roger Dow, president & CEO of the U.S. Travel Association. The Luncheon also included a highly attended general session by Martin Stoll, founder and CEO of Sparkloft Media, on how to leverage social media. These events drew 1,412 registrants representing 713 companies.

## **CONVENTION SALES & MARKETING**

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 second quarter, the sales team secured future meetings and conventions with an estimated 303,131 attendees for the Orange County Convention Center, which will generate \$597 million in economic impact.

**In-House:** Also in the second quarter, the sales team secured future meetings and conventions with an estimated 159,379 attendees for Orange County hotels, which will generate \$231 million in economic impact.

## Citywide Production

April - June	Q2 Results	Year-to-Date Results
	2018	2018
Future Attendance <sup>1</sup> Secured	303,131	598,667
Estimated Room Nights <sup>2</sup>	666,888	1.32M

<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

April - June	Q2 Results	Year-to-Date Results
	2018	2018
Future Attendance Secured	159,379	260,365
Hotel Room Nights	347,496	539,202
Hotel Leads	817	1,413

## Citywide Sales Key Bookings

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

- Premiere Beauty Show: 58,600 attendees, June 2023
- Florida United Numismatists: 15,000 attendees, January 2022
- American Sportfishing Association ICAST: 15,000 attendees, July 2021 and 2022
- National Fire Protection Association: 7,800 attendees, June 2024 and 2026
- ASI Show: 7,000 attendees, January 2024

## Key Hotel Bookings

Key hotel bookings in the second quarter include:

- American Association of Christian Counselors: 6,400 attendees, September 2021
- Spooky Empire: 6,000 attendees, October 2018
- Amway: 6,000 attendees, October 2018
- American Angus Association: 3,000 attendees, November 2023
- Bemer: 2,000 attendees, October 2018

### Direct Sales Activities

Activity	Total	Participants/Attendees
Tradeshows	2	3,200
Missions	3	200
Client Events	7	6,300

- Visit Orlando and its partners welcomed meeting planners from the selection company HelmsBriscoe to Orlando April 30 for their Annual Business Conference. The event, which offered key education and networking opportunities, allowed Visit Orlando to promote "Why Choose Orlando," showcasing what's new in our destination for convention attendees — from theme parks and entertainment to hotels and restaurants.
- Visit Orlando's sales team attended the Professional Convention Management Association's Visionary Awards May 2 in Washington, D.C. More than 1,000 business event professionals were represented, including many of Visit Orlando's top convention clients.
- The convention sales team, along with several Visit Orlando members, hosted a destination orientation May 8-11 for 13 meeting planners for corporate, association and specialty groups. The meetings they represent could bring thousands of new attendees to Orlando area hotels, restaurants and attractions.
- Visit Orlando conducted a successful sales mission in Boston May 9-10, allowing members to network with key clients, share what's new in Orlando and answer questions regarding our destination's offerings. In addition, meeting with new prospects helped increase destination awareness and opportunities for future business.
- Visit Orlando's meetings and convention team joined 16-member companies May 22 to host a client event. There were 60 key clients in attendance from groups such as the National Association of Home Builders, IAAPA, American Pharmacists, Helicopter Association International and United Fresh. Our members interacted with clients as they participated in a networking game with a health and fitness theme. Nike athletes shared current trends, health and fitness consulting, and new products.
- Visit Orlando attended Meeting Professionals International's World Education Conference June 1-6 in Indianapolis. The tradeshow, which drew more than 2,300 attendees, allowed Visit Orlando to meet with key event planners through one-on-one appointments, networking events and educational seminars.

- Sixty-five members from the Healthcare Information and Management Systems Society (HIMSS) were in Orlando June 4-5 for the HIMSS Diamond Summit. HIMSS will hold its annual convention at the Orange County Convention Center in February 2019; 40,000 attendees are expected.
- Visit Orlando and its members hosted meeting planners and key leaders May 16-20 from Maritz Novartis, a leading event management company that executes more than 800 meetings per year. The team visited dining and entertainment venues across the destination and experienced new attractions at Universal, Disney Springs and Animal Kingdom.

### **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 our 24-page [Orlando Destination Guide](#) custom co-op 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 second quarter, our Orlando insert dropped in PCMA's Convene, Meetings & Conventions and Aspire magazines. In addition, digital banners ran on ad networks Tribal Fusion, Northstar Meetings Network, ASAEcenter.org and MPIweb.org, driving significant traffic to our partner websites. This campaign delivered 17.6 million print and digital impressions in the second quarter; year to date, it has driven more than 55,000 website visits to OrlandoMeeting.com and our partners.
- **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. In the second quarter, full-page meetings destination ads ran across the top trade magazines, including Meetings & Conventions, Meetings Today, Meeting Mentor and Black Meetings & Tourism. Additionally, our digital efforts continue to perform well, with a focus on top-performing programmatic ad networks, value-driven email broadcasts and paid social targeting meeting professionals. We also introduced a new account-based marketing program, leveraging a first-party data partnership with Northstar Media Group to deliver highly targeted digital banners, email and social messaging to our top 20 citywide prospect companies. In the second quarter, the campaign delivered 13.8 million print and digital impressions, resulting in more than 38,000 visits to OrlandoMeeting.com, with an above-average click-thru rate (CTR).

### **Destination Meeting Services**

The Destination Services team conducted 122 client sites and client meetings in the second quarter, as well as 125-member sites and member meetings.

<b>April - June</b>	<b>Q2 Results</b>	<b>Year-to-Date Results</b>
	<b>2018</b>	<b>2018</b>
<b>Service Leads Issued<sup>1</sup></b>	165	342

<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.