

## Another Record Year on the Horizon for Tourism Industry

Through the first nine months of 2018, our destination is on pace to set records in several key areas, including hotel demand, average daily room rate, tourist development tax revenue and air passenger traffic. In addition, hotel occupancy continues to be very strong and the Orange County Convention Center will likely experience its second- or third-best year ever for attendance. While we are monitoring some economic headwinds that indicate performance may slow during the fourth quarter, signs still point to 2018 being another record year overall.

To increase awareness in our top domestic markets, while driving visitation during the traditionally slower fall season, Visit Orlando launched an integrated campaign that encourages consumers to “Make Every Day a Holiday.” Supplementing these efforts, international highlights included “Uniquely Orlando” campaigns built around key booking periods in Canada and the UK. In Brazil, where our brand health survey confirmed Orlando remains the preferred vacation destination for families, our messaging centered on visitors exploring the Theme Park Capital of the World®.

In August, a record number of members attended Visit Orlando’s Business Insights Luncheon & Economic Forum, and in September Visit Orlando’s Magical Dining Month wrapped up a successful 13<sup>th</sup> year, with more than 100 restaurants supporting two local charities: Best Buddies and the Down Syndrome Association of Central Florida. (The final donation amount will be announced Dec. 13 at our Annual Meeting & Luncheon.) To coincide with Magical Dining, our public relations team secured several stories promoting Orlando’s array of quality dining options, generating twice as much publicity as last year. And on the conventions sales side, our sales team secured business that will result in 447,267 attendees and \$879 million in economic impact over the next seven years.

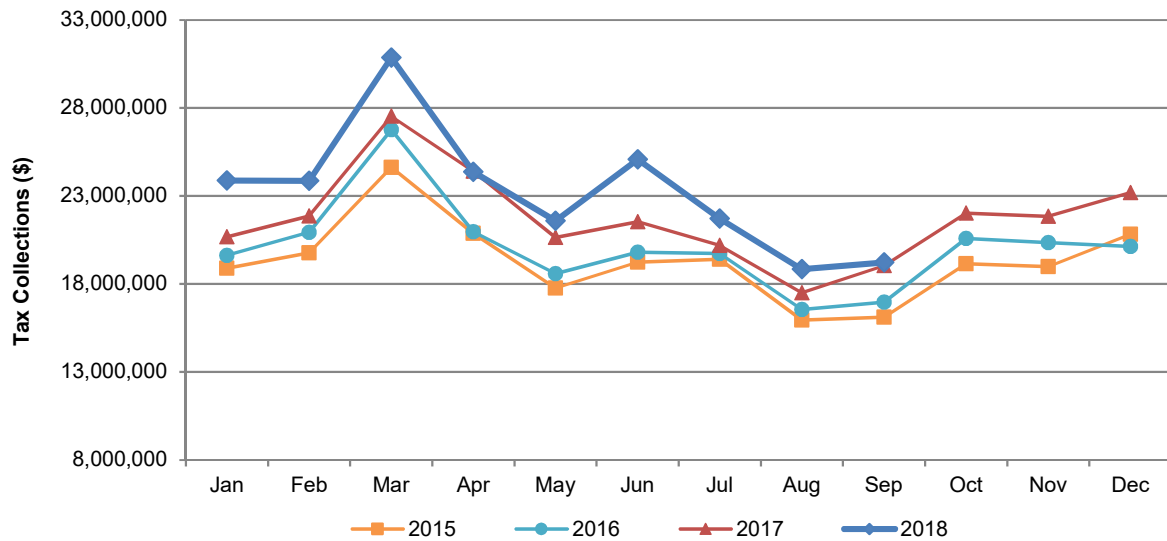
Finally, in the third quarter of each year, Visit Orlando compiles a report on the economic impact of the region’s tourism’s industry. Join us in celebrating the remarkable accomplishments for 2017:

- Tourism generated \$70.8 billion in economic impact and supported 449,000 jobs (41 percent of Orlando’s workforce).
- Visitor spending, which rose 5.8 percent last year to \$44.3 billion, provided \$2.4 billion in state taxes and \$3.1 billion in local taxes.
- And since 2009, visitation has increased 55 percent, while visitor spending is up 75 percent.

George Aguel  
President & CEO

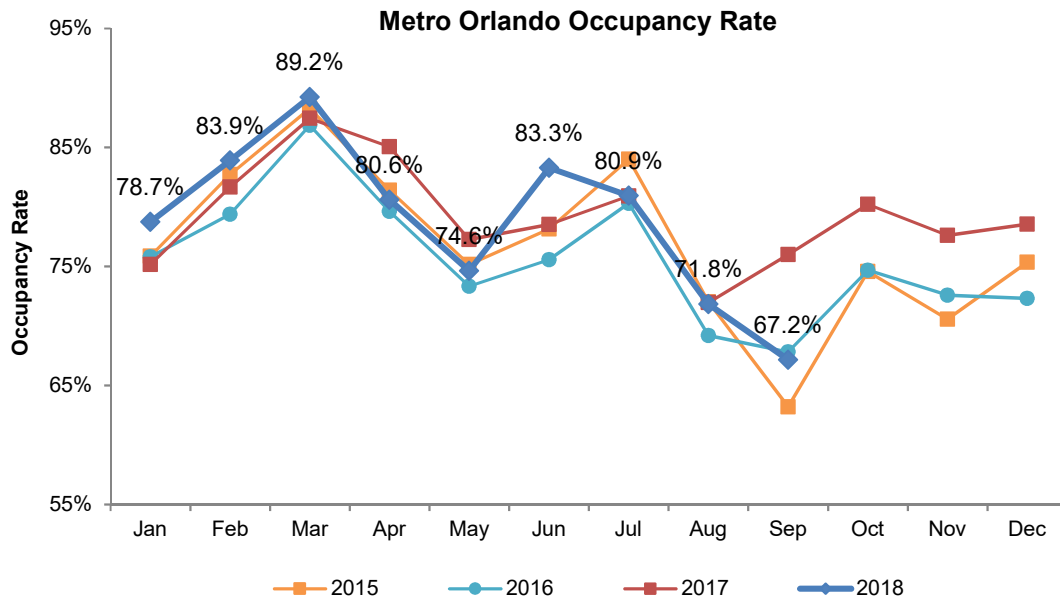
## INDUSTRY PERFORMANCE

### Orange County Tourist Development Tax Collections



### Metro Orlando Lodging Indicators

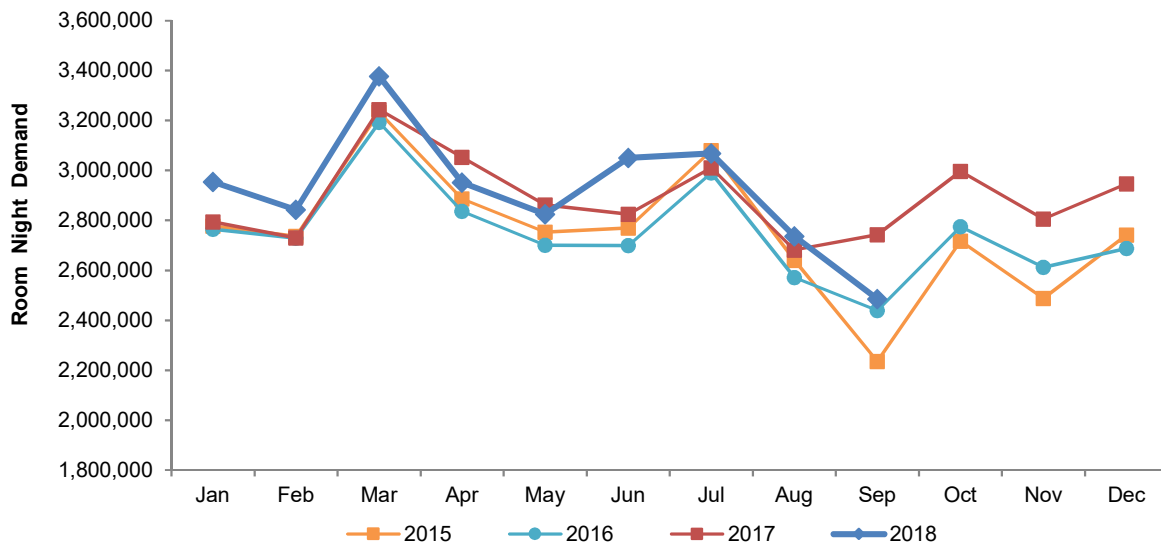
The following data are based on the January through September results released by STR. Please note that STR information does not include Disney-owned and -operated hotels, nor does it include the short-term rental of alternative accommodations such as timeshares, condos and vacation homes.



<b>Occupancy</b>		
	<b>Q3 Results</b>	<b>Year-to-Date Results</b>
	<b>2018</b>	<b>2018</b>
<b>Orange County</b>	76.0%	81.1%
<b>Metro Orlando</b>	73.4%	78.8%
<b>Florida</b>	69.1%	74.3%
<b>National</b>	71.0%	67.7%

<b>Average Daily Rate</b>		
	<b>Q3 Results</b>	<b>Year-to-Date Results</b>
	<b>2018</b>	<b>2018</b>
<b>Orange County</b>	\$116.64	\$135.48
<b>Metro Orlando</b>	\$110.44	\$127.62
<b>Florida</b>	\$122.71	\$145.84
<b>National</b>	\$131.75	\$130.37

**Metro Orlando Room Night Demand**



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

	<b>Q3 Results</b>	<b>Year-to-Date Results</b>
	<b>2018</b>	<b>2018</b>
<b>Supply<sup>1</sup></b>	11,300	33,336
<b>Demand<sup>2</sup></b>	8,289	26,292

<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**

An integrated fall domestic campaign targeting consumers launched in Orlando's top markets of New York City and surrounding areas, Philadelphia, Atlanta, Miami and Tampa. Prominent television and outdoor marketing — including bus wraps and multiple high-profile positions in Times Square — increased top-of-mind awareness while driving general demand. Simultaneously, online banners, digital billboards and radio were used to promote Orlando's many fall-related events and maximize visitation from our drive markets in the Southeast.

In addition to our "Uniquely Orlando" brand messaging, the marketing team added new messaging promoting Orlando's fall festivals and holiday celebrations, encouraging consumers to "Make Every Day a Holiday." The campaign drives consumers to [VisitOrlandoHolidays.com](http://VisitOrlandoHolidays.com) and provides them a chance to win a "Uniquely Orlando" family vacation.

Visit Orlando's Magical Dining Month, sponsored by American Express, completed its 13<sup>th</sup> year during the third quarter. Our media campaign, which ran Aug. 20 to Sept. 30, generated more than 10 million impressions through radio, billboards, print, digital banners, social posts and search engine marketing.

#### **Brazilian Marketing Campaign**

Our second flight of national media, which runs through the end of November, launched in Brazil during the third quarter. Engaging consumers through television, print, out-of-home, digital, content marketing, social media and search engine marketing, the campaign centers on Orlando as the "Theme Park Capital of the World®" — a message that aligns with Brazilians' top reason for traveling to our destination. To this end, monthly e-newsletters also continue to engage more than 250,000 unique Brazilian subscribers. Also during the third quarter, our research team's brand health survey confirmed Orlando maintains its position as the preferred vacation destination for Brazilian families. Furthermore, our top position among competitors is mostly unchallenged.

#### **Canadian Marketing Campaign**

Our fall Canadian campaign, which launched in Ontario, encourages visitation during key booking periods. New this year, Visit Orlando ran one-minute, in-destination segments during "Big Fun Movies" on Canada's most popular family channel, YTV. Additional contest and brand spots were featured on YTV, Teletoon and the W broadcast stations. Our Visit Orlando brand spot also began appearing on both conventional and cable television, targeting women ages 25 to 54.

## United Kingdom Marketing Campaign

Our “Uniquely Orlando” fall campaign in the UK and Ireland ensured Orlando was top of mind during the September/October key booking period. The integrated media schedule consisted of national television, digital, social media, print and London outdoor advertising. Advertising drove potential visitors to Visit Orlando’s UK and Ireland website landing pages for more information and tools to make holiday planning easier. Monthly e-newsletters focused on value, dining, theme parks, Halloween and fall activities. Initiatives continued to be implemented with key trade partners to provide additional exposure, drive sales and value messaging.

## **Media**

<b>Advertising Campaigns</b>	<b>Impressions</b>	<b>Description</b>
United States	277M	TV, Print, Out of Home, Digital TV/Radio, Digital Display, Social Media, Search Engine Marketing
Brazil	173M	TV, Print, Out of Home, Digital Display, Social Media, Content Marketing, Search Engine Marketing
Canada	16.9M	TV, Digital Display, Social Media, Search Engine Marketing, Broadcast
United Kingdom/Ireland	234M	TV, Print, Out of Home, Digital Display, Social Media, Search Engine Marketing

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

<b>July - September</b>	<b>Q3 Results</b>	<b>Year-to-Date Results</b>
	<b>2018</b>	<b>2018</b>
<b>Monthly Sessions</b>	4.6M	12.2M
<b>Total Page Views</b>	13.7M	29.7M

## Direct Marketing

### **E-newsletters**

<b>Market</b>	<b>Delivered</b>	<b>Open Rate</b>	<b>Click Through Rate</b>
<b>United States Consumer</b>	9.4M	6.9%	6.1%
<b>Florida Consumer</b>	2.49M	9.0%	8.0%
<b>International Consumer</b>	1.68M	15.6%	7.9%

## Travel Industry Sales

Sales activities included the following markets: Argentina, Brazil, Canada, Chile, China, Colombia, Continental Europe, India, Mexico, UK/Ireland and the United States.

<b>July - September</b>	<b>Q3 Results</b>	<b>Year-to-Date Results</b>
	<b>2018</b>	<b>2018</b>
<b>Travel Professionals Trained (In-Person and Online)</b>	11,950	28,400
<b>Travel Professional Sales Calls</b>	1,480	4,000
<b>Travel Professional Events (Tradeshows, Missions, Destination Orientations)</b>	19	60

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

Using Visit Orlando's Magical Dining Month as a springboard, the public relations team focused on promoting Orlando's array of quality dining options. Publicity efforts resulted in doubling year-over-year impressions to 502 million. Coverage included stories in BuzzFeed, MSN, AARP, the Chicago Tribune, Tampa Bay Times, Orlando Sentinel and many other outlets. The team helped Visit Orlando's Magical Dining restaurant participants and our two charity partners gain exposure through 15 television interviews in Orlando and Tampa, and nearly 20 stories also ran in Brazil, Mexico, Canada and the UK.

In the UK, the team worked with the UK Post Office on its annual long-haul holiday report, which resulted in Orlando being listed as the cheapest U.S. destination and seventh-least-expensive destination in the world — our highest-ever ranking. This coverage generated 68 million impressions across eight publications, including major outlets like [Mail Online](#) and [Daily Telegraph](#). Timed perfectly to a key booking period, these stories provided credible third-party insight on the value of an Orlando holiday.

In Sao Paulo, Visit Orlando forged new relationships with 20-plus top-tier Brazilian publications, creating opportunities to feature our destination's dining scene, new and upcoming attractions, fall festivals and holiday celebrations. The team hosted media interviews, met with airline and embassy partners, and worked with a local art company to feature Orlando's iconic attractions. One significant outcome of the Sao Paulo visit resulted in Visit Orlando partnering with Brazil's CARAS Magazine to bring 11 celebrities from [Globo TV](#), the [XFactor](#) and the [Voice Brasil](#) to Orlando in September to promote our destination's diverse attractions, activities and dining. Their experiences will be showcased on CARAS's TV show, magazine, blog, website and social media, in addition to each celebrity's social media platforms. To date, coverage has garnered 85 million impressions.

To extend awareness beyond traditional media in the Canadian market, our team worked with two top-tier lifestyle and travel influencers. Instagrammer [@ThatsoTee](#) (195,000 followers) showcased a romantic couple's getaway to Orlando with her 195,000 followers through a series of posts. [@BellaBucchiotti](#) shared a more adventurous take on Orlando with her 651,000 followers, highlighting experiences like hot air balloons and kayaking.

July - September	Q3 Results	Year-to-Date Results
	2018	2018
<b>Impressions Public Relations</b>	1.6B	5.2B

### Content

The content team produced 169 video projects, 12 multimedia shoots and 26 new or updated stories to Visit Orlando's consumer blog. Popular topics included [tips for a perfect family getaway](#), experiencing [Winter Park like a local](#), [VIP experiences at theme parks](#) and [top reasons to visit ICON Orlando 360](#). An

additional six blogs were produced for the meetings and conventions team. Three new landing pages were also created for VisitOrlando.com, and 43 others were updated to ensure the website contained timely news and information.

### Social Media

Social media efforts focused on driving impressions and creating innovative content to increase engagement. A sweepstakes on Instagram ran for three weeks in support of Visit Orlando's Magical Dining Month, receiving more than 1,000 entries and 122,000 impressions. The team also tested new content techniques and participated in relevant social trends to further expand the Visit Orlando brand. Content included the Orlando GIF challenge on Instagram, the "Walls of Orlando" campaign and the #OrlandoFun weekend update.

July - September	Q3 Results	Year-to-Date Results
	2018	2018
<b>Impressions Paid + Organic Impressions</b> (Facebook)	66.2M	118.8M
<b>Visit Orlando Blog</b> (Total Page Views)	676,295	1.2M
<b>Visit Orlando Followers</b> (Facebook, Twitter, Instagram)	Secured 56,100 new followers	1.62M total followers

### Industry Communications

Visit Orlando leveraged numerous platforms to communicate the value and perspective of tourism in the local community. Content detailing the positive impact of tourism was provided for two-page monthly spreads in i4 Business magazine, six issues of our community and industry e-newsletter Tourism Matters, and in regular posts on LinkedIn. We conducted presentations to business and community groups including the Florida Vacation Rental Management Association, Orange County Sheriff's Office, City of Orlando law enforcement and tourism industry security personnel, 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, which was broadcast live on Orange TV.

More than 100 students from the University of Central Florida's Rosen College of Hospitality Management celebrated World Tourism Day by participating in Visit Orlando's annual job shadow program. Students were matched with employers best suiting their career interests for a day of hands-on learning. Companies included Walt Disney World Swan and Dolphin Resort, Rosen Plaza Hotel, Orlando Shakespeare Theater, Hilton Orlando, the Great Escape Room and several others.

### MEMBER RELATIONS

The membership team continued delivering education and networking opportunities for members to make meaningful business connections. In the third quarter, the team held two new member orientations, two "Power Hour" lunches — including a presentation from Michael Townes, Visit Orlando's director of

business development — one Member Meet-Up and three Visit Orlando’s Magical Dining Month orientations for participating restaurants. A record number of members for the August Luncheon enjoyed an economic forum featuring Anirban Basu, chairman & CEO of Sage Policy Group, and Daryl Cronk, senior director of market research at Visit Orlando. Keynote speaker Jeremy Gutsche, CEO of Trendhunter.Com, presented during the luncheon. Year to date, Visit Orlando member events have drawn 2,519 unique registrants representing 1,126 companies.

## CONVENTION SALES & MARKETING

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

### M&C Sales Performance

**Citywide:** In the third quarter, the sales team secured future meetings and conventions with an estimated 274,156 attendees for the Orange County Convention Center, which will generate \$538 million in economic impact.

**In-House:** Also in the third quarter, the sales team secured future meetings and conventions with an estimated 173,111 attendees for Orange County hotels, which will generate \$341 million in economic impact.

### Citywide Production

July - September	Q3 Results	Year-to-Date Results
	2018	2018
<b>Future Attendance<sup>1</sup> Secured</b>	274,156	861,815
<b>Estimated Room Nights<sup>2</sup></b>	603,143	1.9M

<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

July - September	Q3 Results	Year-to-Date Results
	2018	2018
<b>Future Attendance Secured</b>	173,111	435,066
<b>Hotel Room Nights</b>	371,757	914,294
<b>Hotel Leads</b>	903	2,468



### **Citywide Sales Key Bookings**

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

- United States Chess Federation: 20,000 attendees, April 2025
- Amateur Athletic Union of the United States: 98,000 attendees, June 2021 & June 2022
- Staples: 5,000 attendees, March 2019
- Jeunesse Global: 5,000 attendees, September 2019
- Southeastern Conference of Seventh Day Adventist: 8,000 attendees, August 2021

### **Hotel Key Bookings**

Key hotel bookings in the third quarter include:

- Church of God in Christ: 10,000 attendees, May 2022, May 2023 & May 2024
- National Association of Collegiate Directors of Athletics: 5,000 attendees, June 2023 & June 2025
- Optum Corporation: 5,000 attendees, September 2020
- Ernst & Young: 3,400 attendees, November 2021
- Association of Women's Health Obstetric & Neonatal Nurses: 3,500 attendees, June 2021

### **Direct Sales Activities**

<b>Activity</b>	<b>Total Number</b>	<b>Total Number of Participants/Attendees</b>
<b>Tradeshows</b>	3	6,800
<b>Missions</b>	4	140
<b>Client Events</b>	5	4,600

- Visit Orlando attended the American Society of Association Executives' annual conference in Chicago to solicit future business and interact with industry decision-makers. ASAE consists of more than 21,000 association executives and industry partners representing more than 9,300 organizations across the United States and in nearly 50 countries around the world.
- Visit Orlando attended Cvent Connect in Las Vegas to solicit future business from more than 2,500 meeting planners. During the trade show, planners attended 15-minute, pre-scheduled appointments with Visit Orlando to increase awareness and build strong relationships that will ultimately generate bookings for Orlando.
- Visit Orlando attended the Florida Society of Association Executives' annual conference in Fort Lauderdale, networking with more than 1,100 industry professionals and generating future business opportunities for our destination. Orlando will host the event in 2020.

- The Society of Independent Show Organizers held its leadership conference in Orlando, with key executives from companies including Informa, Reed Exhibitions and Emerald Expositions in attendance. The group is responsible for shows such as MegaCon (70,000 attendees in 2019), the PGA Merchandise Show (43,000 attendees in 2019) and the Surf Expo (27,000 attendees in September).
- Visit Orlando interacted with over 150 associates of Meetings and Incentive Worldwide at the M&IW Showcase in Chicago. M&IW is a global meetings, incentive and conference management company that manages more than 3,000 events annually for some of the world's largest corporations and associations.
- Visit Orlando's convention sales team networked with hundreds of meeting professionals at the 2018 Kellen Managers Summit, Aug. 27-29 in Atlanta. Kellen is a global management company serving 125-plus trade associations, professional societies and charitable organizations that represent more than 10,000 companies and 100,000 professionals.
- Visit Orlando held sales missions in Minneapolis, Philadelphia, Chicago and San Francisco, helping members engage with more than 140 top meeting planners. Participants shared new information regarding their hotels and venues, building relationships that will drive future meetings and convention business to Orlando.

### **Convention Marketing Update**

To maintain Visit Orlando's position as America's top-ranked meetings destination — and to continue growing our group business leads for both citywide and non-citywide meetings and convention business — two trade media campaigns targeted M&C 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**, which includes our 24-page [Orlando Destination Guide](#) custom insert, runs across nine of the top national meeting trade publications. In addition, a comprehensive digital media schedule with shared online display banners from our cooperative member partners and emails are used to increase exposure. In the third quarter, our Orlando insert ran in Successful Meetings and Smart Meetings magazines, and digital banners ran on networks such as Tribal Fusion, Northstar Meetings Network, ASAEcenter.org and MPIweb.org, driving significant traffic to our partner websites. The campaign delivered 15.6 million print and digital impressions during the third quarter; year to date, it has driven nearly 70,000 website visits to OrlandoMeeting.com and our partners, with an above average click-thru rate.

- The **in-house (non-citywide) brand media plan** promotes 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 third quarter, full-page meetings destination ads ran across the top trade magazines, including Associations Now and Convene, as well as Meetings Today and Meeting Mentor magazines. Additionally, our digital efforts continue to perform well, with focus on top-performing programmatic ad networks, value-driven email broadcasts and paid social targeting meeting professionals. We also completed a new account-based marketing program, targeting our top 20 citywide prospect companies, as well as effectively driving new database leads with an “experiential meetings” whitepaper. In the third quarter, the campaign delivered 13.6 million print and digital impressions, resulting in more than nearly 72,000 visits to OrlandoMeeting.com, with an above average click-thru rate.

**Destination Meeting Services**

The destination services team conducted 107 client sites and client meetings, as well as 101-member sites and member meetings.

<b>July - September</b>	<b>Q3 Results</b>	<b>Year-to-Date Results</b>
	<b>2018</b>	<b>2018</b>
<b>Service Leads Issued</b>	363	528