

Celebrating Another Excellent Year in Tourism

Fueled by a strong mix of new product investment and global marketing, Orlando's tourism industry celebrated another stellar year in 2018, with our destination registering record performances across several key indicators. Among the many highlights:

- Orange County collected a record \$280 million in Tourist Development Tax for the calendar year (+7.5 percent over 2017).
- Orlando International became the state's busiest airport, welcoming the most passengers in its history (47.7 million).
- The average daily hotel rate climbed to a record \$127.32, and occupancy levels — despite a moderate dip in the fourth quarter — continued to pace well ahead of state and national averages at 77.5 percent.
- The Orange County Convention Center had one of its best years for total attendance (1.45 million).
- The leisure and hospitality sector, Orlando's No. 1 employer, added 10,100 jobs (an almost 4 percent increase).

Our final visitation number for 2018 will be announced at Visit Orlando's Celebrating Travel & Tourism Luncheon in May. Judging from the indicators above, we anticipate surpassing the record 72 million visitors who came to our destination in 2017.

In the fourth quarter, Visit Orlando's ongoing domestic media campaign encouraged consumers to "Make Everyday a Holiday," while international campaigns drove awareness in our top markets of Canada, the United Kingdom and Brazil. To generate even more buzz about our destination, and increase our marketing database, we leveraged an offer for Black Friday/Cyber Monday deals for discounted theme park tickets at VisitOrlando.com.

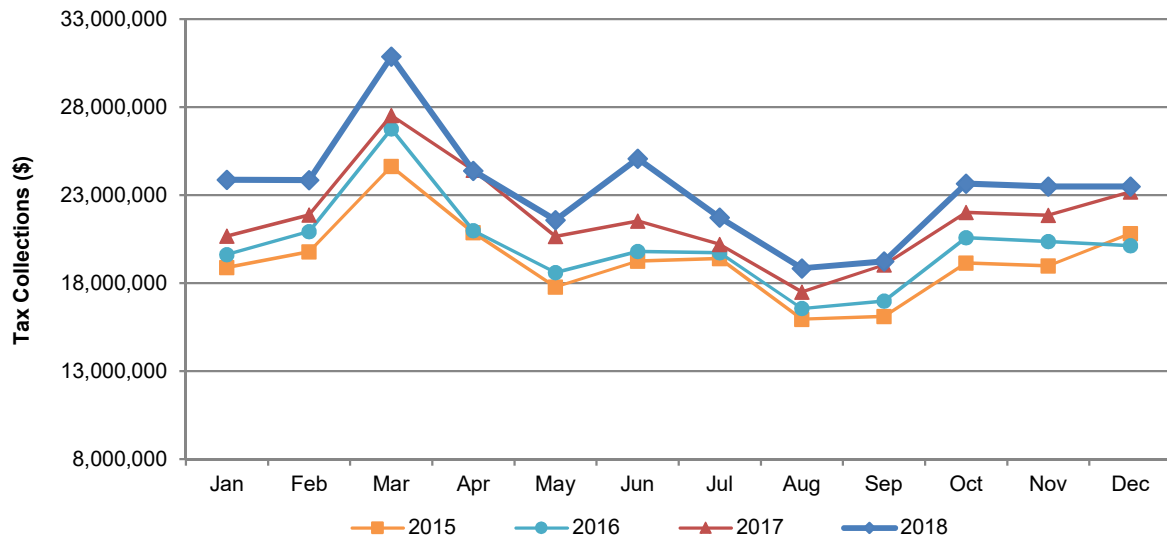
On the convention sales side, we secured business that will result in 835,995 attendees and \$1.6 billion in future economic impact, and our marketing and publicity teams also launched efforts to promote OCCC's \$605 million capital improvement plan. To wrap up the year, over 1,000 members and guests attended our Annual Business Meeting & Luncheon, where we presented the biggest charity donation ever for Visit Orlando's Magical Dining Month (\$251,766).

Looking ahead, the forecast for 2019 remains encouraging, yet with some economic uncertainty. We believe that our destination's ongoing product investment, coupled with our strong global marketing efforts at Visit Orlando, will continue to drive an increased level of demand — this year and beyond, on both the leisure and convention sides.

George Aguel
President & CEO

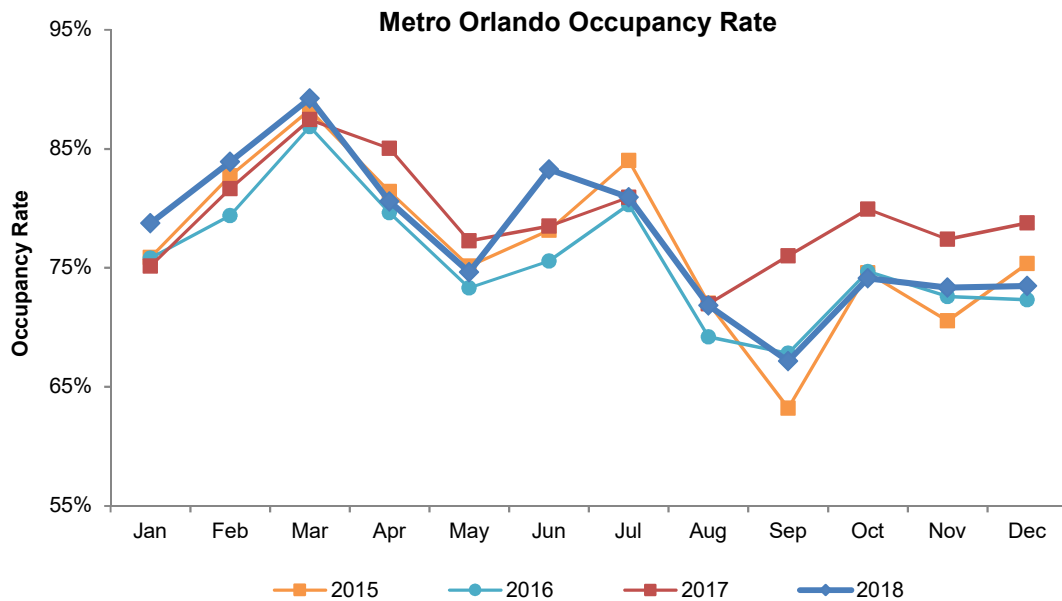
INDUSTRY PERFORMANCE

Orange County Tourist Development Tax Collections



Metro Orlando Lodging Indicators

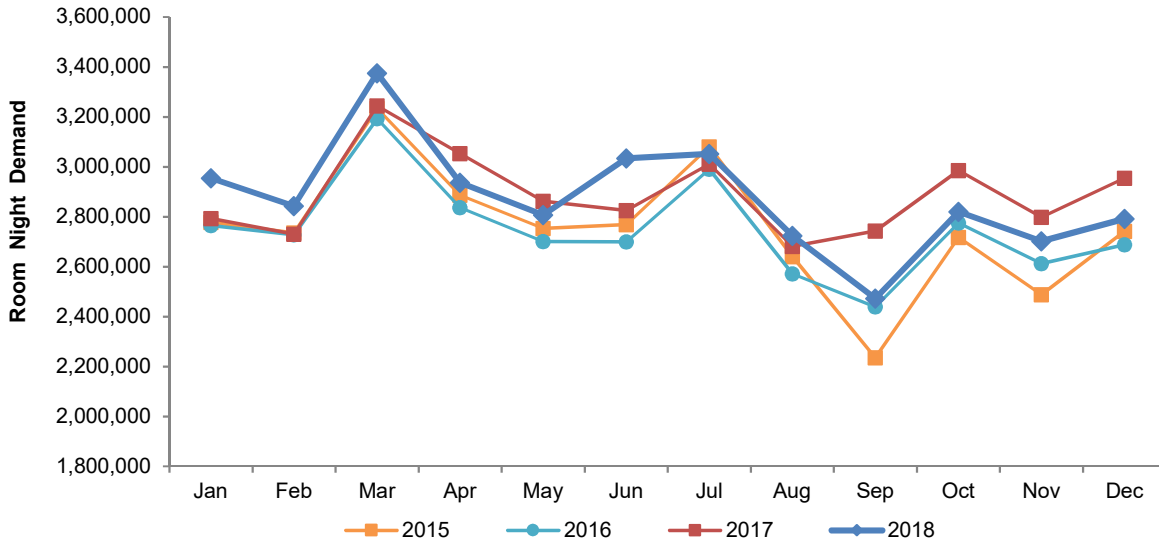
The following data are based on the January through December results. Please note the information does not include Disney-owned and -operated hotels, nor does it include the short-term rental of alternative accommodations such as timeshares, condos and vacation homes.



Occupancy		
	Q4 Results	Year-to-Date Results
	2018	2018
Orange County	76.6%	80.0%
Metro Orlando	73.6%	77.5%
Florida	68.7%	72.9%
National	61.9%	66.2%

Average Daily Rate		
	Q4 Results	Year-to-Date Results
	2018	2018
Orange County	\$133.29	\$134.94
Metro Orlando	\$126.34	\$127.32
Florida	\$138.29	\$144.06
National	\$127.90	\$129.83

Metro Orlando Room Night Demand



Room-Night Supply & Demand (in thousands)

	Q4 Results	Year-to-Date Results
	2018	2018
Supply¹	11,287	44,502
Demand²	8,313	34,512

¹ Room-night supply: Computed each month by taking the number of hotel/motel rooms multiplied by number of days in the month

² 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

Visit Orlando's ongoing domestic media campaign reached consumers in our key markets of New York City, Philadelphia, Atlanta, Miami and Tampa. Top-performing New York placements were extended into December to drive early travel demand for 2019, which allowed us to take advantage of the family holiday movie season on cable channels such as Hallmark and ABC Family. In addition, our new "Make Everyday a Holiday" campaign continued with digital video in the Southeast to maximize visitation. These efforts resulted in strong website visitation and generated more than 30,000 database opt-ins from our "Uniquely Orlando" promotion. Ad tracking results for our domestic campaign also showed strong overall aided awareness, driving intent (66 percent) and interest (80 percent) in visiting Orlando.

Brazilian Marketing Campaign

Our Brazilian campaign, which wrapped at the end of November, achieved more than 356 million impressions during the fourth quarter and 689 million for the year. Monthly e-newsletters continued to engage more than 270,000 unique subscribers with relevant information about our destination, focusing on topics of importance to the Brazilian audience. Ad tracking research showed high recall and likeability, with 83 percent of the target population recalling the campaign. Intent to travel to Orlando in the next 12 months continues to be high at 43 percent, allowing Orlando to remain the No. 1 top-of-mind destination for Brazilian families. Also, two major Brazilian tour operator cooperative campaigns targeting travelers with national media and in-store advertising concluded in December.

Canadian Marketing Campaign

Our Canadian campaign, which ran in Ontario, encouraged destination selection for winter vacations. The integrated media schedule consisted of national cable television, digital, social media, print and outdoor advertising. An addition to our media efforts this quarter was leveraging targeted influential leaders. Visit Orlando brought social influencers to experience our destination and, in turn, the influencers posted articles and videos to their extensive networks, highlighting places where they stayed, dined and visited. Partnership initiatives with tour operators also took place in the fourth quarter, and monthly e-newsletters focused on the important value message to this audience, as well as what's new in Orlando.

United Kingdom Marketing Campaign

Visit Orlando partnered with British Airways and the theme parks on a Dec. 26-31 TV campaign to drive 2019 bookings to our destination. Monthly e-newsletters focused on attraction updates, unique experiences, insider tips, holiday events, value messaging, nonstop air service and offers from key Visit Orlando travel trade partners.

Media

Advertising Campaigns	Impressions	Description
United States	693M	TV, Outdoor, Digital TV/Radio, Print, Digital Display, Social Media, Search Engine Marketing
Brazil	356M	TV, Outdoor, Print, Digital, Social Media, Search Engine Marketing, Content Amplification
Canada	271M	TV, Outdoor, Digital Broadcast, Print, Digital Display, Social Media, Search Engine Marketing
United Kingdom/Ireland	122M	TV, Outdoor, Print, Digital Display, Social Media, Search Engine Marketing

Global Website – VisitOrlando.com

October - December	Q4 Results	Year-to-Date Results
	2018	2018
Website Sessions	5.5M	17.7M
Total Page Views	11.2M	40.9M

Direct Marketing

E-newsletters

Market	Delivered	Open Rate	Click-Through Rate
United States Consumer	3.8M	6.8%	5.6%
Florida Consumer	632,938	8.6%	8.4%
International Consumer	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.

October - December	Q4 Results	Year-to-Date Results
	2018	2018
Travel Professionals Trained (In-person and Online)	7,980	36,275
Travel Professional Sales Calls	1,062	5,100
Travel Professional Events (Tradeshows, Missions, Destination Orientations)	15	34

GLOBAL COMMUNICATIONS (Publicity, Social Media, Content)

To support our message of the value an Orlando vacation provides, and to align with national trend stories, the global communications team promoted Black Friday/Cyber Monday deals in Orlando.

Proactive media relations efforts resulted in 547 million impressions and inclusion in stories from [Forbes](#), [CNBC](#), [CNN](#), [CNN Espanol](#) and [Thrillist](#).

In Canada, the team worked with two lifestyle experts on a national TV tour to six morning shows reaching 2 million viewers. The segments highlighted Orlando as a holiday destination or a gift that lasts beyond the holidays. Stations included Global Toronto, The Morning Show, CHCH Morning Live, CTV Ottawa Morning Live and others.

To showcase Orlando's attractions beyond the theme parks, Visit Orlando hosted top-tier media from the United Kingdom on a destination orientation. Coverage included stories in the Daily Mirror, the Daily Star and New Magazine, a weekly consumer/lifestyle publication that covers international travel and tourism.

In Brazil, the team continued to benefit from relationships created during a third-quarter in-market media event, landing coverage in UOL, one of the most important tourism portals in Brazil; Claudia Magazine, the largest female platform in Brazil; and R7, the second-largest portal of content in Brazil and the seventh-most-visited site in the country.

For convention communications, the team promoted improvements and growth at the Orange County Convention Center -- including announcing the new expansion -- and throughout the convention district. National coverage was secured with an Associated Press story syndicated in more than 30 media outlets, including U.S. News & World Report and New York Daily News. Convention trade coverage included Smart Meetings, BizBash, PCMA Convene, Northstar Meetings Group and USAE.

October - December	Q4 Results	Year-to-Date Results
	2018	2018
Impressions Public Relations	2.6B	7.7B

Content

The content team produced 117 video projects, nine multimedia shoots and 26 new or updated stories to Visit Orlando's consumer blog. Popular topics included [top family experiences in Orlando](#), [2019 New Year's Eve celebrations](#), [the best places to trick-or-treat](#) and [top reasons to visit Pointe Orlando](#). An additional six blogs were produced for the meetings and conventions team, and more than 500 consumer blogs and 50 landing pages were updated for our redesigned VisitOrlando.com website.

Social Media

Social media efforts focused on generating awareness of Visit Orlando's Black Friday/Cyber Monday deals, and several video postings were created to promote deals throughout the destination. This resulted in over 1.1 million impressions.

October - December	Q4 Results	Year-to-Date Results
	2018	2018
Impressions Paid + Organic Impressions (Facebook)	43M	163M

Visit Orlando Blog (Total Page Views)	916,459	2.5M
Visit Orlando Followers (Facebook, Twitter, Instagram)	Secured 33,717 new followers	1.65M total followers

Industry Communications

Visit Orlando's Magical Dining Month raised a record \$251,766 for two local charities: Best Buddies and the Down Syndrome Association of Central Florida. Communications managed Visit Orlando's relationship with the selected nonprofits and coordinated a press announcement surrounding the record donation. We also 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 American Diabetes Association, City of Orlando and the Orange County Public Schools NAF Academy of Hospitality & Tourism, informing them about the positive impact of the region's travel industry. President & CEO George Aguel also gave presentations to the Board of County Commissioners and the Orange County Tourist Development Council that were broadcast live on Orange TV.

MEMBER RELATIONS

The membership team continued delivering educational and networking opportunities for members to make meaningful business connections. In the fourth quarter, the team held two new-member orientations, two "Power Hour" lunches with presentations from industry experts, and one webinar providing information on helpful technology tools. Over 1,000 members and guests also attended Visit Orlando's Annual Meeting & Luncheon in December, which included a keynote speaker and, for the first time, a general session featuring TripAdvisor's Global Director of Strategic Insights. In 2018, Visit Orlando hosted member registrants from over 1,300 organizations at 37 events.

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: The sales team secured future meetings and conventions with an estimated 835,995 attendees for the Orange County Convention Center, which will generate \$1.6 billion in economic impact.

In-House: The sales team secured future meetings and conventions with an estimated 165,464 attendees for Orange County hotels, which will generate \$242 million in economic impact.

Citywide Production

October - December	Q4 Results	Year-to-Date Results
	2018	2018
Future Attendance¹ Secured	835,995	1.77M
Estimated Room Nights²	1.84M	3.9M

¹ Future attendance based on number of delegates at a meeting or convention's most recent event.

² Estimated room nights = attendance multiplied by average length of stay (2.2 nights)

In-House Production

October - December	Q4 Results	Year-to-Date Results
	2018	2018
Future Attendance Secured	165,464	605,650
Hotel Room Nights	364,379	1.29M
Hotel Leads	852	3,320

Citywide Sales Key Bookings

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

- AAU Girls Junior Volleyball Championship: 98,000 attendees, June 2023
- Megacon: 68,000 attendees, April 2020
- American Dental Association: 29,500 attendees, October 2026
- Coverings: 28,000 attendees, April 2029
- Orgill Incorporated: 22,000 attendees, February 2028 & 2030
- American Association for Cancer Research: 22,000 attendees, April 2023
- International Sign Association: 20,000 attendees, April 2024
- American Academy of Pediatrics, 20,000 attendees, October 2028
- Global Pet Expo: 16,000 attendees, March 2023, 2024 & 2025
- American Sportfishing Association: 15,000 attendees, July 2023 & 2024
- Ace Hardware Corporation: 15,000 attendees, October 2020

Hotel Key Bookings

Key hotel bookings in the fourth 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
- Capella University Commencement: 7,000 attendees, March 2020
- Associated Equipment Distributors: 3,500 attendees, January 2022

- OneStream Software: 2,500 attendees, May 2021
- OncLive National Meeting: 2,000 attendees, October 2019
- TD Ameritrade: 2,000 attendees, January 2024

Direct Sales Activities

Activity	Number	Total Participants/Attendees
Tradeshows	8	13,800
Missions	2	121
Client Events	1	1,000

- Seventeen meeting planners representing corporations and associations with the potential to bring significant meetings to Orlando visited our destination Oct. 3-5 for a Visit Orlando product orientation. Planners from Prestige Global, Lamont and Associates and Global Cynergies, among others, toured various hotels and attractions.
- In conjunction with members, Visit Orlando participated in IMEX, the largest industry tradeshow in North America, Oct. 16-18. The high-energy event offered business opportunities with key decision-makers, senior buyers and third-party planners from across the U.S. and internationally.
- Visit Orlando’s convention sales team attended the National Coalition of Black Meeting Planners’ “Elevate, Educate and Engage” event in New Orleans Nov. 28-29, as well as ConferenceDirect’s Forum Meeting in Huntington Beach Nov. 27-30. These highly attended industry events help Visit Orlando connect with key association and corporate planners from across the U.S. to drive future group business to our destination.
- Visit Orlando and member companies connected with key convention decision-makers and show organizers Dec. 11-13 in New Orleans at the International Association of Exhibitions and Events Annual Expo. IAEE is the leading association for the global exhibition industry, with members in 50-plus countries. More than 2,300 industry members and trade show association professionals attended the event.
- Visit Orlando teamed up with Disney Meetings & Events, Hello! Destination Management, Hilton Orlando, Universal Orlando Resort, Westgate Lakes Resort and others at the American Express INTER(action) Tradeshow Dec. 13-15 in San Diego. Hundreds of AMEX associates worldwide attended the program, which included one-on-one appointments.
- Visit Orlando and members attended the FICP 2018 Annual Conference in Orlando. More than 1,000 financial and insurance conference planners were at the conference, which included one-on-one appointments.

- Visit Orlando and member companies conducted a sales mission to Washington, D.C., our largest association convention market. We connected with 40 prospective clients who total an economic impact of more than \$220 million in tentative and definite business for Orlando.

Convention Marketing Update

To maintain Visit Orlando’s position as America’s top-ranked convention destination — and to continue growing our business leads for both citywide and non-citywide meetings — two convention trade media campaigns targeted planners 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. A comprehensive digital media schedule, with shared online display banners from our cooperative member partners and emails, is used to increase exposure. The printed co-op inserts concluded in the third quarter; however, we continued with the digital version through the end of the year. Also in the fourth quarter, full-page cooperative ads ran in Prevue, Aspire and Meetings Today. Digital banners ran on networks such as Tribal Fusion and NorthStar Meetings Network, as well as through search retargeting partners, driving significant traffic to our partner websites. The campaign delivered 19.1 million print and digital impressions during the fourth quarter; year to date, it has driven over 170,000 website visits to OrlandoMeeting.com and our members, with an above-average click-through rate.
- The **in-house (non-citywide) brand media plan** promotes Visit Orlando’s “in-house” hotel meeting capabilities, as well as new destination group product offerings, with print and heavy digital national brand coverage. In the fourth quarter, full-page meetings destination ads ran across the top convention trade magazines, including Associations Now, Successful Meetings, Aspire and Meetings & Conventions magazines. 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. In the fourth quarter, the campaign delivered 10.1 million print and digital impressions, resulting in more than 90,000 visits to OrlandoMeeting.com, with an above-average click-through rate. For the year, OrlandoMeeting.com eclipsed 200,000 planners for the first time.

Destination Meeting Services

The Destination Services team conducted 100 client site visits and client meetings in the fourth quarter, as well as 63 member site visits and member meetings.

October - December	Q4 Results	Year-to-Date Results
	2018	2018
Service Leads Issued¹	350	878

¹ 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.