

## **Significant Campaigns Target Key U.S., International Markets**

To keep Orlando top of mind for leisure and business travel, while guarding against a projected slowdown in national economic growth, Visit Orlando began 2019 by launching significant marketing, communications and sales campaigns in key U.S. and international markets.

Domestically, we strengthened our presence in the Northeast by adding Boston, extending our Uniquely Orlando and Winter Escape campaigns, and running a promotion with NBC affiliates in New York City, Philadelphia and Boston. On the international front, we kicked off our strongest campaign to date in the UK and Ireland, conducted an eight-city roadshow to train UK travel advisers on how to sell our destination, and partnered with Canadian TV programs to provide live segments from sunny Orlando.

Our global communications team worked with media outlets and social influencers to generate a wide variety of publicity in the U.S., Canada, UK and Brazil, emphasizing Orlando's many attractions beyond the theme parks. To further communicate the breadth and depth of our destination, we also redesigned VisitOrlando.com to be a highly visual, mobile-first website that better conveys the many diverse experiences visitors (and in-state residents) can enjoy.

Other Q1 highlights include: securing convention business that will result in over 487,000 attendees and \$895 million in future economic impact; hosting 1,200 registrants from 500-plus companies at Visit Orlando events; and earning recognition from the internationally recognized Routes Marketing Awards for global campaigns conducted in 2018, in support of our airport, multiple airlines and member companies.

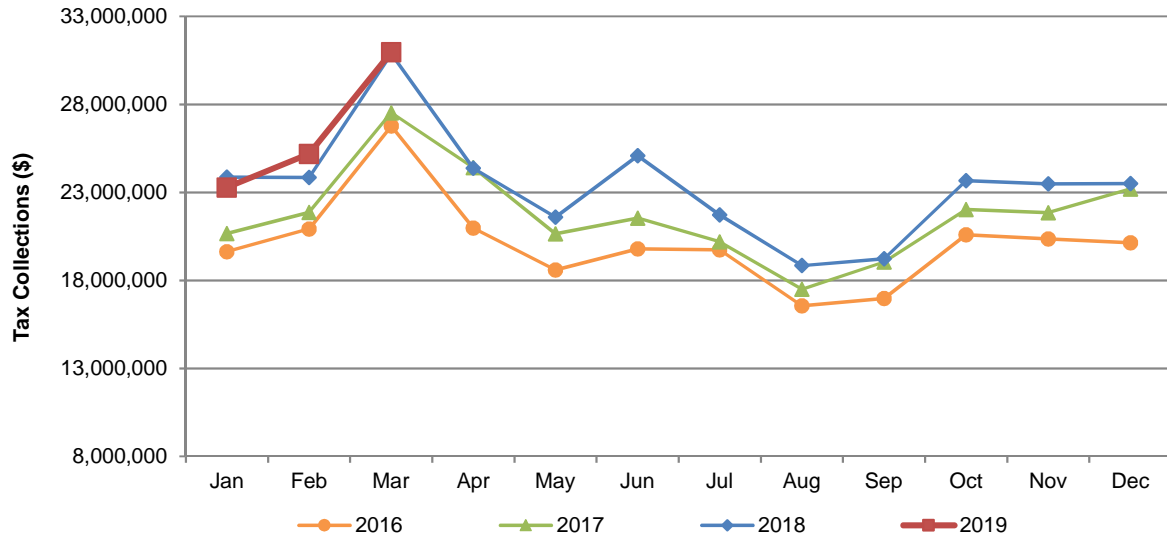
Looking ahead, our near-term forecast calls for cautious optimism and a more moderate pace of growth, due largely to a strong dollar and in part to potential headwinds in our core international markets. Over the long term, however, Orlando's tourism industry continues its tradition of investing in new experiences that keep visitors coming back in record numbers, year after year. Along these lines, our hotel supply is growing at its fastest rate in 20 years, our airport is expanding to meet increasing demand, and the Orange County Convention Center is launching a five-year capital expansion plan.

Indeed, these are exciting times for our destination, and Visit Orlando is proud to play a leading role in its success.

George Aguel  
President & CEO

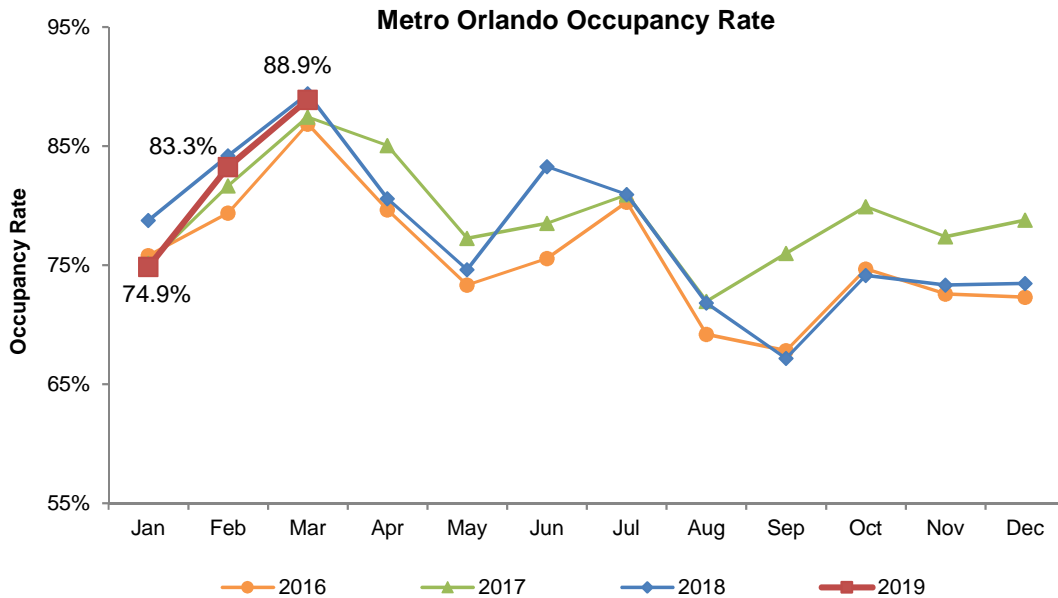
## INDUSTRY PERFORMANCE

### 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.



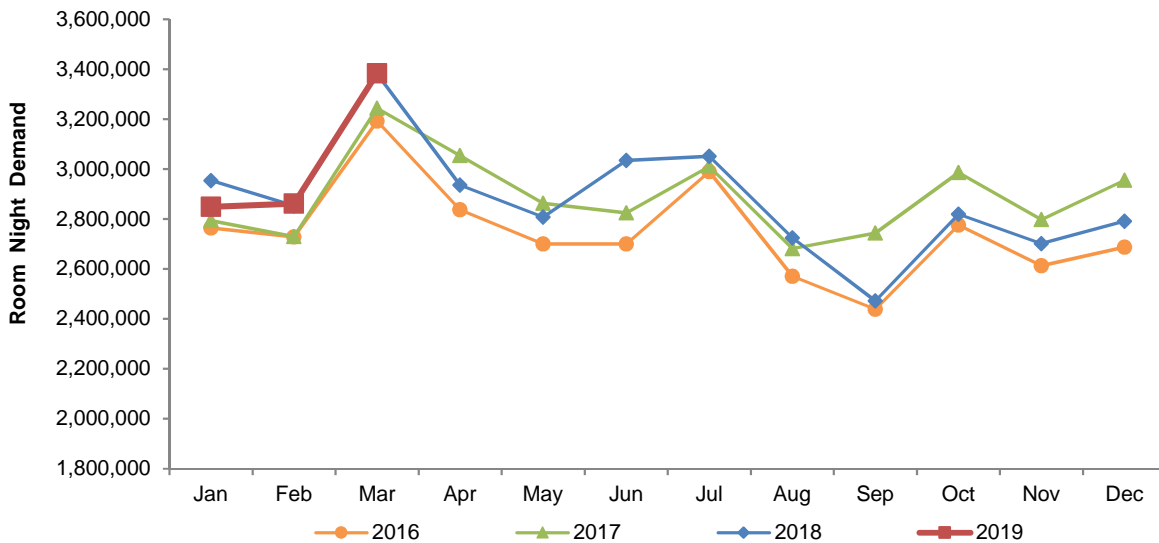
### Occupancy

	Q1 Results
	2019
Orange County	84.5%
Metro Orlando	82.3%
Florida	79.3%
National	61.8%

### Average Daily Rate

	Q1 Results
	2019
Orange County	\$148.38
Metro Orlando	\$139.78
Florida	\$170.95
National	\$129.02

### Metro Orlando Room Night Demand



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

	Q1 Results
	2019
Supply <sup>1</sup>	11,048
Demand <sup>2</sup>	9,094

<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**

Visit Orlando launched our Northeast spring campaign in late January, targeting consumers in our top markets of the New York area, Philadelphia and Boston. New this year, Boston was added to strengthen our presence in the Northeast and capitalize on the region's high propensity to travel to Orlando. To drive spring and summer travel demand, we also frontloaded our media schedule and extended the campaign from eight weeks to 15 weeks. Our refreshed "Uniquely Orlando" brand creative, along with our new "Winter Escape" promotional overlay, contrasted the Northeast's dreaded winter weather with Orlando's warm, sunny climate. The campaign drove high impression volume, increased website visitation and resulted in more than 100,000 entries for our promotional contest.

One highlight of the campaign was our NBC promotional TV integration, which included custom content segments filmed in Orlando and distributed to NBC affiliates in our top three markets. Visit Orlando worked with travel expert Erika Vetrini and her family to capture several awe-inspiring moments, from the theme parks to International Drive and more. The integrated program provided nearly 30 minutes of on-air TV exposure for Orlando, a "Win-at-Winter" promotional contest, New York City taxi and transit segments, and digital and social media.

In the Southeast, Visit Orlando launched a campaign in mid-February that reached consumers in Atlanta and Florida. In addition to our brand creative, it included a promotional overlay called "Eventful Spring" to promote the destination's many food and music festivals.

The Northeast and Southeast campaigns delivered 610 million impressions in the first quarter and will continue to run through May.

#### **Brazilian Marketing Campaign**

Launched in February, our Brazil campaign focused on keeping Orlando top of mind for families, singles and shopping. It delivered brand creative and relevant messaging on a national scale through TV, print, outdoor, digital display, social media, content amplification and search engine marketing. 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. In addition, the team hosted NBC Universal Brazil to film a series showcasing Orlando's unique shopping options, which will air on Universal Channel and Studio Universal throughout 2019.

## **Canadian Marketing Campaign**

Canada's first-quarter marketing campaign focused on driving destination awareness and selection for the spring travel season. The integrated media schedule consisted of national and cable television, digital, social media, print and outdoor advertising that included billboards and digital screens at subway stations. All creative messaging featured warm weather, sunshine and families enjoying their Orlando vacation. Visit Orlando also had inside front cover ad placement with a two-page advertorial in the popular Canadian family magazine Today's Parent.

In January, Visit Orlando worked with The Weather Network, headquartered in Canada, to produce 24 "look-live" segments showcasing what's new in our destination. Airing Feb. 18 to March 3, the segments promoted our warm destination during Canada's winter, a key booking period. The campaign also featured a local forecast takeover, 360-degree video integration, and digital and social media.

In February, Visit Orlando filmed a two-day live broadcast on location with Canada's popular news morning show CP24. Each of the live hits featured show hosts and meteorologists promoting what's new and exciting in our destination. The three-week promotion included a sweepstakes and 16 minutes of on-air TV exposure in Toronto. Complementing our digital and social efforts, a special landing page on the station's website showed videos of our warm destination during some of Canada's coldest days of the year.

Together, The Weather Network and CP24 integrations generated more than 9.2 million impressions.

## **United Kingdom Marketing Campaign**

From Dec. 25 through Jan. 31, Visit Orlando implemented our destination's strongest winter campaign to date in the United Kingdom and Ireland, encouraging families to book their 2019 holiday. The integrated media plan, which included TV, digital and social media, generated more than 267 million impressions. In addition, ad tracking results showed overall awareness at its highest level for the UK market, as well as a high intent to travel. Monthly e-newsletters focused on new openings, theme park updates, beyond the parks, value messaging, dining experiences and offers from key Visit Orlando trade partners.

## **Media**

<b>Advertising Campaigns</b>	<b>Impressions</b>	<b>Description</b>
United States	603M	TV, Outdoor, Digital TV/Radio, Print, Digital Display, Social Media, Search Engine Marketing
Brazil	63M	Paid TV, Print, Outdoor, Digital Display, Social Media, Content Amplification and Search Engine Marketing
Canada	212M	TV, Broadcast Integrations, Print, Outdoor, Digital Broadcast, Digital Display, Social Media, Search Engine Marketing
United Kingdom/Ireland	268M	TV, Digital Display, Social Media, Search Engine Marketing

## Global Website – VisitOrlando.com

January - March	Q1 Results
	2019
Monthly Sessions	4.7M
Total Page Views	10.7M

### Direct Marketing

#### E-newsletters

Market	Delivered*	Open Rate	Click Through Rate
United States Consumer	2.4M	6.7%	7.0%
Florida Consumer	368,803	9.8%	8.2%
International Consumer	1.7M	15.6%	7.9%

\* No e-newsletters were sent in January.

### Travel Industry Sales

Visit Orlando continued to expand relationships with key tour operators and train travel advisers on how to sell Orlando. For example, during the first quarter, Visit Orlando and members conducted a roadshow in the UK, training 830 travel advisers across eight cities. To increase engagement, Visit Orlando implemented engaging platforms through interactive polling.

January - March	Q1 Results
	2019
Travel Professionals Trained (In-person and Online)	6,335
Travel Professional Sales Calls	663
Travel Professional Events (Tradeshows, Missions, Destination Orientations)	17

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

The public relations team kicked off 2019 with a mission to New York City, conducting appointments with more than 25 media and pitching stories for spring and summer coverage. The team secured national media coverage to help drive visitation in the first half of the year, covering topics such as what's new for 2019 and top reasons to visit Orlando for spring break. Publications included Newsday, Travel + Leisure, MSN.com, Dallas Morning News and Pop Sugar.

Raising awareness of Orlando attractions beyond the theme parks, the team also hosted a destination orientation for domestic media in February that featured downtown businesses and events, landing coverage in publications such as USA Today, TravelChannel.com and Elite Daily, with more that feature downtown businesses and activities anticipated in the coming months. Internationally, the team hosted a destination orientation with seven UK media outlets to promote travel to Orlando during a key booking period. The group press trip included publications in Scotland, Liverpool, Manchester and Birmingham to

showcase the ease of access to Orlando from these regional markets. Results are anticipated over the next few months.

In Canada, Orlando’s top international market, the team promoted value messaging and reasons to visit Orlando for March break. Results included a syndicated story across the Sun Media Network that appeared in 75 papers; Today’s Parent, Canada’s top parenting magazine; The Globe & Mail, the country’s leading national newspaper; RedFlagDeals.com, a leading website for deals and promotions; and a TV segment on CHCH Morning live, a top regional morning show.

From Brazil, Visit Orlando hosted three influencers with a combined reach of more than 2 million during a destination orientation, each focusing on topics such as Orlando for families, dining and what’s new.

January - March	Q1 Results
	2019
<b>Impressions Public Relations</b>	819M

### Content

The content team produced video projects, multimedia shoots and 25 new or significantly updated stories to Visit Orlando’s consumer blog. Popular topics included [spring festivals](#), [reasons to visit Pointe Orlando](#), [insider shopping tips](#) and [why Orlando is great for all ages](#). Five blogs were produced for the meetings and conventions team, as were the 2019 Official Attendee Guide and 2019 Meeting Professionals Guide. More than 35 landing pages were updated or created for VisitOrlando.com.

### Social Media

Visit Orlando continued to elevate our social media channels, including Facebook, Instagram and Twitter, with a focus on promoting unique things to see and do. To increase engagement from visitors and reinforce authentic experiences, we expanded our use of user-generated content across all channels with great success. We also implemented a new strategy toward our layout on Instagram to highlight experiences beyond the theme parks. In January, we launched a campaign that showed why Orlando is a great escape for winter, with sunshine year-round. This campaign earned 2.5 million impressions. The success of these tactics has allowed us to maintain strong organic (unpaid) reach on all channels, as well as securing an additional 42,800 followers.

January - March	Q1 Results
	2019
<b>Impressions (Facebook)</b>	30.9M
<b>Visit Orlando Blog (Total Page Views)</b>	866,322
<b>Visit Orlando Followers (Facebook, Twitter, Instagram)</b>	Secured 42.8K new 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 East Orlando and International Drive chambers of commerce, as well as University of Central Florida students, educating them on the positive impact of our 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 are available for public viewing on Orange TV.

## MEMBER RELATIONS

The membership team continued delivering educational and networking opportunities for members to make meaningful business connections. In the first quarter, the team held three new-member orientations, four "Power Hour" lunches with presentations from industry experts, and one "Member Meet-up" business networking event. In addition, Visit Orlando had record-setting attendance of more than 700 at our 13<sup>th</sup> annual professional networking event at Pointe Orlando. During the first quarter, Visit Orlando hosted 1,200 registrants from 500-plus unique companies at member events. The team also began significant work to improve the member portal, the online community where members access important resources such as research, the member directory and leads.

## CONVENTION SALES & MARKETING

Visit Orlando secures two types of meeting and convention business: at the Orange County Convention Center (aka "citywide") and at Orange County hotels (aka "in-house").

### Meetings and Conventions Sales Performance

**Citywide:** The sales team secured future meetings and conventions with an estimated 362,542 attendees for the Orange County Convention Center, which will generate \$714 million in economic impact.

**In-House:** The sales team secured future meetings and conventions with an estimated 124,594 attendees for Orange County hotels, which will generate nearly \$181 million in economic impact.

### Citywide Production

January – March	Q1 Results
	2019
<b>Future Attendance<sup>1</sup> Secured</b>	362,542
<b>Estimated Room Nights<sup>2</sup></b>	797,592

<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
	2019
Future Attendance Secured	124,594
Hotel Room Nights	253,513
Hotel Leads	1,021

## Citywide Sales Key Bookings

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

- Premiere Beauty Show: 59,772 attendees, May 2024
- Grace Hopper Celebration of Women in Computing: 20,000 attendees, October 2024 & 2025
- IACP Annual Conference: 18,285 attendees, October 2032 & 2036

## Hotel Key Bookings

Key in-house hotel bookings in the first quarter include:

- LifeWay Women Live: 4,000 attendees, July 2019
- Dynamic Communities, Inc. Summits/User Conference: 7,000 attendees, October 2019
- Conscious Discipline Elevate SEL: 2,000 attendees, July 2019
- Music Festival Trips Home Bass: 1,500 attendees, June 2019
- National Veterinary Associate Community Gathering: 1,200 attendees, April 2020
- SEI F5 Agility Meeting: 2,500 attendees, July 2020

## Direct Sales Activities

Activity	Total Number	Total Number of Participants/Attendees
Tradeshows	7	546
Missions	1	68
Client Events	2	104

- Nearly 4,000 meeting professionals from around the world attended the Professional Convention Management Association's Convening Leaders conference Jan. 6-9 in Pittsburgh. During the tradeshow, Visit Orlando and the Orange County Convention Center presented to, and connected with, top meeting planners at a hosted buyer luncheon. Visit Orlando and members also hosted more than 110 top event planners and executives for a special event aimed at creating future business for our destination.

- Visit Orlando's meeting and conventions team attended the Religious Conference Management Association, a multifaith, international association of religious meeting planners, Jan. 29-31. The conference, held in North Carolina, enabled Visit Orlando and members to strengthen relationships with key meeting planners and educate them on the diverse opportunities available in our destination.
- Visit Orlando and member companies traveled to New York City in late March to participate in Pharma Forum 2019, a conference addressing the most critical trends affecting the medical-meeting management industry. More than 100 appointments were conducted to help drive future business to our destination.
- During the first quarter, Visit Orlando held an annual client event in Philadelphia, connecting with nearly 75 convention clients at the Philadelphia Flyers game and a special luncheon at the historic Union League.

### **Convention Marketing Update**

To maintain Visit Orlando's position as America's top-ranked convention destination — and to continue growing our group leads for both citywide and in-house meetings — three convention trade media campaigns targeted planners in the U.S. and Canada. These campaigns included the convention cooperative media plan, the non-citywide/brand media plan, and the Orange County Convention Center building improvement media plan.

- The **citywide cooperative media** plan, which includes our 24-page Orlando Destination Guide custom insert, runs across seven 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. In the first quarter, our Orlando insert dropped in ASAE's Associations Now, Northstar Meetings & Convention, Meetings Today and Prevue magazines. In addition, digital banners ran on ad networks Northstar Meetings Network, ASAEcenter.org and MPIweb.org, driving significant traffic to our partner websites. Full-page ads ran in Successful Meetings and Smart Meetings and, new this year, digital ads were placed on social networks including Facebook and Instagram. Digital banners ran on networks such as Zeta and NorthStar Meetings Network, as well as through search retargeting partners, driving significant traffic to our partner websites. The campaign delivered 10.9 million print and digital impressions during the first quarter.
- 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. 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, Meeting Mentor, Corporate and Incentive Travel, and Black Meetings & Tourism. Additionally, Visit Orlando kicked off our digital efforts in February with top-performing ad networks, email broadcasts and paid social targeting meeting professionals. To date, the campaign has delivered 8.1 million print and digital impressions and resulted in more than 40,000 visitors to our meetings website, [www.OrlandoMeeting.com](http://www.OrlandoMeeting.com).

- This year there is an additional print and digital campaign focused on promoting the **Orange County Convention Center's building improvement** project. Launched in March and running through December, full-page ads were featured in Meetings & Conventions and Convene magazines. Digital efforts included two email broadcasts through NorthStar Meetings Group and Prevue, as well as paid social media targeting meeting professionals. To date, the campaign has delivered 1.8 million print and digital impressions.

### **Destination Meeting Services**

The destination services team conducted 148 client site visits and client meetings in the first quarter, as well as 53 member site visits and member meetings.

<b>January - March</b>	<b>Q1 Results</b>
	<b>2019</b>
<b>Service Leads Issued<sup>1</sup></b>	303

<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.