

Tourism's Positive Impact Continued to Grow in 2019

Buoyed by new product investment and strong global marketing, Orlando's tourism industry continued its upward trajectory in 2019, with record performances in several key areas. Among the many highlights:

- Orange County collected a record \$289 million in Tourist Development Tax (+3.2%).
- Orlando International remained the state's busiest airport, topping 50 million passengers.
- The Metro Orlando lodging sector added nearly 2,600 hotel rooms, while occupancy rate (76.1%) continued to pace well ahead of state and national averages.
- The Orange County Convention Center had its fourth-best year for total attendance (1.425 million) and citywide attendance (1.249 million).
- The leisure and hospitality sector, Orlando's No. 1 employer, grew to 463,000 jobs (+4.1%).

In the fourth quarter, Visit Orlando was proud to join Orange County Mayor Jerry Demings at World Travel Market in London, where he promoted "Unexpected Orlando" on CNN International and kicked off our standing-room-only media and trade conference. WTM helped us gain valuable exposure for our destination among key clients throughout the global travel industry.

On the marketing side, our fall media campaign targeted core domestic markets. International campaigns drove awareness in Canada, the United Kingdom and Brazil. In convention sales, we secured business that will result in over 593,000 attendees and \$1.08 billion in future economic impact. And to quantify the benefits of our region's No. 1 industry, we publicized a study showing tourism generated a record \$75.2 billion in economic impact in 2018, which translates to about \$1,000 per visitor, while providing \$5.8 billion in local and state tax revenue.

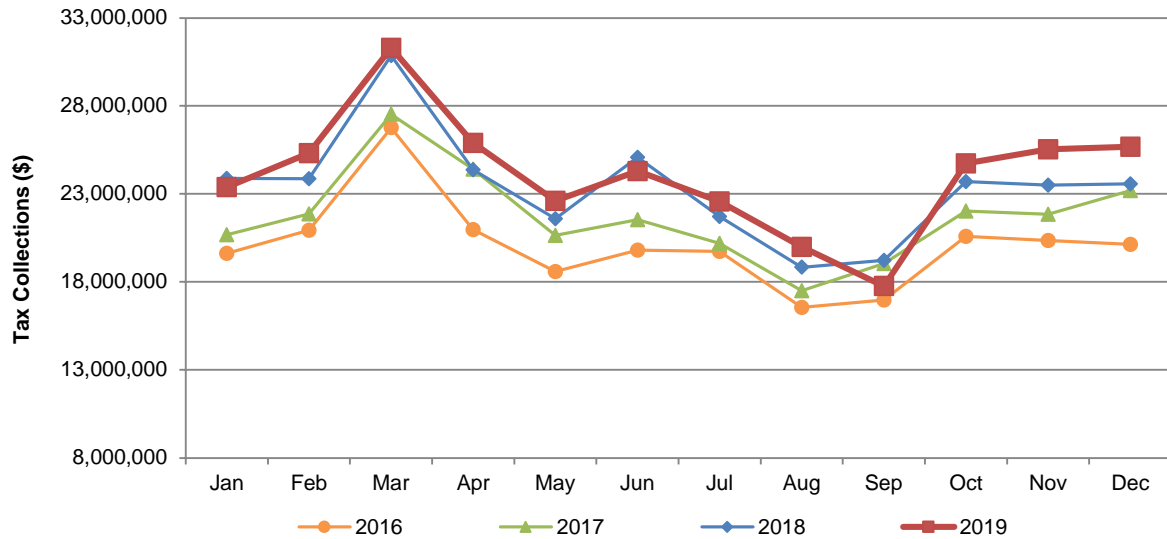
Wrapping up the year on a high note, a record number of industry and community leaders registered for our Annual Business Meeting & Luncheon, where we made the biggest charity donation ever for Visit Orlando Magical Dining Month (\$306,722) and revealed that our MORlando Challenge adventurers needed 121 days to experience everything our destination has to offer.

Looking ahead, it's clear that America's most visited destination is on the verge of another dynamic decade, with exciting developments across all sectors of Orlando's tourism community. Throughout the 2020s, our industry will continue to evolve, invest in the future, create jobs and generate positive economic impact for our entire region.

George Aguel
President & CEO

INDUSTRY PERFORMANCE

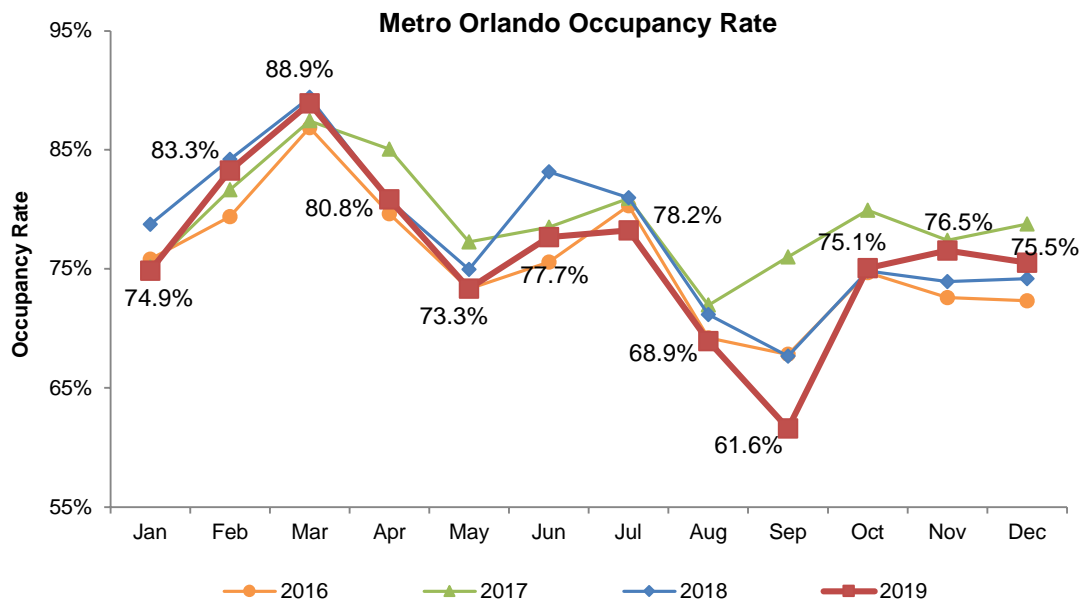
Orange County Tourist Development Tax Collections



Source: Orange County Comptroller's Office

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.



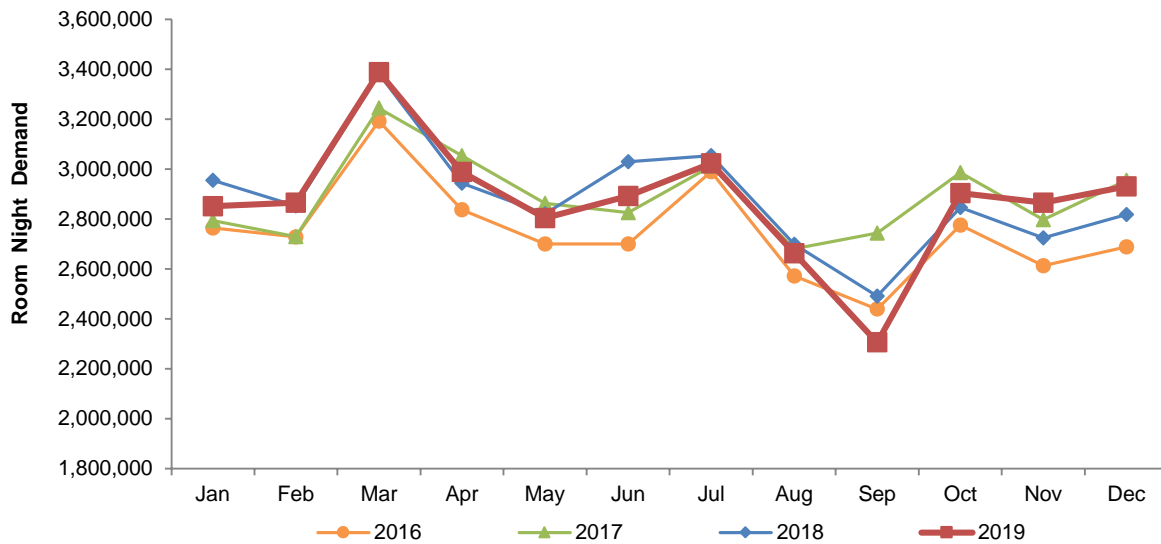
Occupancy

	Q4 2019	Year to Date
Orange County	78.6%	78.8%
Metro Orlando	75.7%	76.1%
National	61.8%	66.1%
Florida	69.4%	72.3%

Average Daily Rate

	Q4 2019	Year to Date
Orange County	\$137.62	\$134.52
Metro Orlando	\$129.76	\$126.95
National	\$128.88	\$131.21
Florida	\$139.69	\$145.21

Metro Orlando Room Night Demand



Room-Night Supply & Demand (in thousands)

	Q4 2019	Year to Date
Supply ¹	11,492	45,266
Demand ²	8,699	34,479

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

To drive incremental visitation and travel demand for 2020, we continued our fall domestic campaign in the key markets of New York, Philadelphia, Boston, Atlanta and Florida through the end of October. The campaign included TV, digital radio and out-of-home platforms, as well as paid social. Ad Tracker research showed 83% of target moms were inspired to visit our destination as a result of Visit Orlando advertising. In November, we launched our Black Friday promotion, offering over 50 experiences to encourage Orlando visitation. Ongoing marketing efforts such as paid social media and lead generation continued through the end of the year. In addition, we completed our fall programs with TripAdvisor, Expedia and Priceline, driving incremental fall room night bookings from these.

Brazilian Marketing Campaign

Achieving over 200 million impressions for the quarter and more than 778 million for the year, our second flight of the Brazilian campaign ran through December. The campaign included national TV, print, out-of-home, digital platforms, social media and search engine marketing. Research showed high likeability of all media supporting the campaign, with 84% of the target population recalling our ads. Intent to travel to Orlando in the next year was up by 50%. Orlando continues to be the No. 1 destination for Brazilian families, and more than half of targeted adults strongly agree that Visit Orlando advertising makes them want to visit. In addition, we partnered with key Brazilian tour operators on three cooperative campaigns, delivering over 137 million impressions. The campaigns engaged travelers through national media, digital, social, out-of-home and in-store advertising.

Canadian Marketing Campaign

Our Canadian winter campaign — consisting of TV, outdoor, digital displays, social and online video — concluded mid-December and drove early bookings for winter 2019-2020. Ad Tracker research showed improvement in awareness compared to the same time last year, and our advertising continues to play a role in influencing Orlando visitation. Impressions grew year over year (21%) and intent to travel was up seven percentage points.

United Kingdom Marketing Campaign

At the end of December, we launched a winter campaign in the UK and Ireland that provided extensive destination coverage and encouraged families to book their 2020 holiday to Orlando. Over 333 million impressions are expected as a result of the integrated media campaign, which extended its reach to couples who might travel during off-peak periods. Monthly consumer e-newsletters highlighted what's new, unique experiences, holiday events, helpful planning resources, value, and offers from key Visit Orlando trade partners.

Media

Advertising Campaigns	Impressions	Description
United States	201M	TV, digital radio, print, outdoor, digital display, social media, search engine marketing
Brazil	200M	TV, print, outdoor, digital display, social media, search engine marketing, content amplification
Canada	17M	Social media, search engine marketing
UK/Ireland	176M	TV, digital display, social media, search engine marketing, cinema

Global Website – VisitOrlando.com

October - December	Q4 2019	Year-End
Monthly sessions	6.8M	22.4M
Total page views	13.4M	49.8M

Direct Marketing

E-newsletters

Market	Delivered	Open Rate	Click Through Rate
United States consumer	6.06M	8.74%	0.68%
Florida consumer	1.14M	11.9%	0.77%
International consumer	1.13M	17.9%	1.59%

Content Development

The content team produced 82 video edits, 17 multimedia shoots and 28 new or significantly updated stories to Visit Orlando's consumer blog. Popular topics included Visit Orlando's Black Friday/Cyber Week Deals; things to do for less than \$20; Orlando's appeal to adults; Visit Orlando Magical Dining; and Halloween, Christmas and New Year's Eve celebrations. Three blogs and two print publications were produced for the meetings and conventions team. More than 35 landing pages were updated or created for VisitOrlando.com.

Social Media

Visit Orlando's social media platforms had nearly 59 million impressions and 3.5 million engagements. In October, we tested a Facebook and Instagram Live weekly video series that highlighted sunrises and sunsets throughout different locations in Orlando. As fans engaged with the videos, the team interacted in real time, securing higher engagement levels than average posts. At the start of December, the team also launched a successful sweepstakes on Facebook and Instagram for fans to win a one-of-a-kind Orlando holiday sweater.

October - December	Q4 2019	Year-End
Impressions: paid + organic (Facebook)	59.5M	281M
Visit Orlando blog (total page views)	705,857	3.4M
Visit Orlando followers (Facebook, Twitter, Instagram)	80,085 new followers	1.9M total followers

Convention Marketing

To maintain Orlando's position as America's top-ranked overall destination for meetings — 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:

- **Orange County Convention Center Expansion Campaign:** This campaign continued to include coverage across all major meetings and exhibitions trade magazines, delivering more than 5.9 million impressions in the fourth quarter. Orlando was featured prominently on the front cover of Meetings & Conventions magazine and promoted by two-page spreads in other trade magazines. We also had unique digital placements with ASAE, a major industry organization, honoring eight of our top citywide clients with the "Planner of Productivity" award, highlighting best practices in innovation and why they love meeting in Orlando.
- **Convention Co-op Campaign:** Orlando Destination Guide 24-page custom inserts were included in seven of the top meetings trade magazines. Accompanied by digital and social media, the campaign received over 12.8 million impressions. Digital efforts continue to outperform the industry average, with high click-through rates and low cost per click.
- **Non-Citywide/Brand Campaign:** Our annual destination brand campaign continued through the fourth quarter, delivering an additional 15 million impressions focused primarily on digital display and paid social to promote Orlando as a top meetings destination, drive website visitation and increase participation in our monthly "What's New" webinar. We were also once again named the "Top Destination in the U.S." by Cvent, and "Best CVB in the Southeast" by the publishers of Meetings & Conventions and Successful Meetings magazines.

Thanks to these combined efforts, impressions went up 20% for the year and website visitation increased 17%. Ad Tracker research showed growth in our campaigns' effectiveness among planners, with more than half stating Visit Orlando advertising inspired them to consider Orlando for their next meeting.

GLOBAL COMMUNICATIONS

Publicity

As we expand to a broader audience, and to showcase the breadth of our destination, the publicity team drove coverage on "Orlando for Adults" and "Beyond the Parks," promoting places to explore such as downtown Orlando and Winter Park. Notable national and international coverage on these themes included USA Today's "Go Escape" magazine, Forbes, AARP, Chicago Tribune, US News & World Report and a Daily Mail story in the UK titled, "Have a blast in Orlando without a trip to Disney."

To encourage fall visitation and highlight Orlando’s unique position as the Halloween Vacation Capital®, we secured coverage in key markets including MSN.com (U.S. and Canada), IG (one of Brazil’s leading news sites), El Heraldo de México and El Sol de México. For the holiday season, we reinforced the value of an Orlando vacation by promoting “the gift of travel” and Black Friday deals, and our media relations efforts in these areas generated 421 million impressions, with stories in [USA Today](#), [CNBC](#), [the Chicago Tribune](#), [Elite Daily](#), [Matador Network](#), [MSN Canada](#), [The Globe and Mail](#) and [Global News](#).

Globally, at one of the tourism industry’s largest events, World Travel Market in London, we executed a standing-room-only media and trade event, securing interviews for Orange County Mayor Jerry Demings on [CNN International](#) and BBC, as well as key trade publications like [Travel Weekly](#). In our destination, we showcased the variety of Orlando as a vacation experience with top-tier media from the UK, Mexico and Brazil. To date, stories have appeared in MdeMulher, a top lifestyle site in Brazil; [IG](#), one of Brazil’s leading news sites; [Viajero Peligro](#), a Mexican influencer; and more than 22 UK regional newspapers such as Birmingham Mail and Liverpool Echo.

To promote Orlando as a top meetings destination, as well as the upcoming Orange County Convention Center expansion, we secured articles in Meetings Today and North Star Meetings Group, publisher of the convention industry’s major publications. Our team also attended IMEX, North America’s leading trade show for the global meetings and events industry, where we coordinated interviews with top meetings and conventions trade publications.

October - December	Q4 2019	Year-End
Impressions: public relations	2.4B	11.2B

Industry Communications

According to a new study from Oxford Economics, tourism generated \$75.2 billion in economic impact for Central Florida, along with a significant impact across multiple business sectors. To educate the community on the value and positive impact of tourism, we shared the study’s results with local stakeholders and media, securing more than 10 stories in outlets such as the Orlando Sentinel, Orlando Business Journal, MSN.com. WDBO, Fox 35 and WFTV.

The team 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, 13 issues of our community and industry e-newsletter Tourism Matters, and in LinkedIn posts. To encourage career paths in Central Florida’s largest industry, we spoke to students enrolled in the Academy of Hospitality & Tourism programs at Freedom and Olympia high schools, as well as Orange Technical College. President & CEO George Aguel also gave a presentation to the Orange County Tourist Development Council.

MEMBER RELATIONS

The membership team continued to focus on engagement by delivering educational and networking opportunities for members to make meaningful business connections. The team held nine member events, including member orientations, “Power Hour” lunches with presentations from industry experts, and “Member Meetup” business networking events. A record 1,115 members and community leaders registered to attend our Annual Meeting & Luncheon in December, which received our highest satisfaction ratings to date. For the year, Visit Orlando hosted more than 6,500 attendees from over 1,400 companies at member events.

CONVENTION SALES

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

M&C Sales Performance

- **Citywide:** The sales team secured future meetings and conventions with an estimated 401,784 attendees for the Orange County Convention Center, which will generate over \$800 million in economic impact.
- **In-House:** The sales team secured future meetings and conventions for member hotels with an estimated 191,828 attendees, which will generate over \$278 million in economic impact.

Citywide Production

October - December	Q4 2019	Year-End
Future attendance ¹ secured	401,784	1.25M
Estimated room nights ²	883,925	2.75M

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 2019	Year-End
Future attendance secured	191,828	628,084
Hotel room nights	444,955	1.3M
Hotel leads	1,028	4,007

Citywide Sales Key Bookings

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

- MegaCon: 75,000 attendees, May 2022
- USA Volleyball Sunshine Classic: 38,000 attendees, February 2021 and April 2022
- National Kitchen & Bath Association: 35,000 attendees, February 2021 and 2022
- American Society of Hematology: 30,000 attendees, December 2034

Hotel Key Bookings

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

- Ernst & Young International Intern Leadership Conference: 7,500 total room nights, July 2020, 2021 and 2022
- Culver Franchising System Annual Reunion: 6,600 total room nights, February 2021
- Norwex Leadership Conference: 6,400 total room nights, August 2023
- Sixthman Lynyrd Skynyrd Simple Man Festival: 6,000 total room nights, August 2020
- BlackLine Systems: 5,700 total room nights, November 2021
- Gopher Academy GopherCon: 5,300 total room nights, June 2022

Direct Sales Activities

Activity	Total Number	Total Participants
Tradeshows	4	549
Missions	3	184
Client events	3	17

- Visit Orlando hosted five top clients at the American Society of Association Executives “Power of A” Summit Awards in October. The awards are ASAE’s highest honor for associations.
- In October, we partnered with members to host 40 decision-makers from top travel associations during a biannual sales mission in Washington, D.C.
- To increase destination awareness and find new meeting prospects for Orlando, the meetings and conventions team partnered with 15 members to host two sales missions in Dallas, engaging with nearly 45 of the industry’s biggest planners.
- Visit Orlando hosted a destination orientation for 12 independent meeting planners in October. This interactive program allowed new clients to experience meeting opportunities at our hotels, restaurants and attractions, as well as network with the convention sales team and our members.
- Convention sales attended Connect Faith in October. The education conference and appointment-only tradeshow brought together faith-based, specialty and association meeting planners together for three days of general sessions, roundtables, workshops and networking.
- Visit Orlando and members met with more than 120 American Express meeting planners at AMEX INTERaction in Denver. These interactions have the potential to bring 28 events to our destination.

- In November, we attended the National Coalition of Black Meeting Planners Annual Convention. This highly attended industry event helps us connect with association and corporate planners from across the U.S. and drive future business to our destination.
- Convention sales attended the Association Forum Holiday Showcase in Chicago, the industry's highest attended one-day exhibition for the city's multibillion-dollar meetings and events market.
- Visit Orlando connected with key convention decision-makers and show organizers Dec. 3-5 at the International Association of Exhibitions and Events (IAEE) Annual Meeting and Exposition. IAEE is the leading association for the global exhibition industry, with members in 50-plus countries.
- Visit Orlando and members hosted nearly 100 meeting planners for potential business for Orlando during our annual Tallahassee sales mission in December.

Destination Meeting Services

The destination services team conducted 110 client site visits and meetings, as well as 82 member site visits and meetings.

October - December	Q4 2019	Year-End
Service leads issued ¹	157	917

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.

TRAVEL INDUSTRY SALES

In October, the travel industry sales team hosted two member missions targeting travel trade suppliers in Mexico and Canada, educating hundreds of travel professionals about our destination. In November, our Brazil “superfam” and marketplace provided members exclusive opportunities to meet with more than 50 elite travel advisers, raise awareness and generate leads. In the Brazilian cities of Sao Paulo, Campinas and Guarulhos, we also held several 1-on-1, immersive training sessions. Our domestic team conducted three webinars reaching over 2,000 U.S. travel professionals, and in Canada we attended the CAA Travel Expo, reaching 2,000 industry professionals and consumers.

In November, Orange County Mayor Jerry Demings and Visit Orlando President & CEO George Aguel participated in World Travel Market in London. The event boasted 51,000 attendees, including 9,000 key decision-makers with direct purchasing power.

October - December	Q4 2019	Year-End
Travel professionals trained (in-person and online)	7,451	28,893
Travel professional sales calls	638	2,816
Travel professional events (tradeshows, missions, destination orientations)	23	79