

Pivoting to Confront the Emerging Global Crisis

The first quarter of 2020 saw the beginning impact of COVID-19 on our economy and our need to move toward a different direction to ensure we remained top of mind during this crisis, while being responsive to our members, clients and visitors.

Pre-pandemic, all signs pointed to 2020 being another strong year for our destination as we launched high-profile campaigns across our core countries. We kicked off one of our most significant consumer media campaigns to date in the U.S., targeting key markets in the Northeast and Southeast, with international efforts centering on Canada, the UK and Brazil. In convention marketing, our new “Expanding Amazing” campaign continued to build momentum for the Orange County Convention Center’s upcoming expansion, as well as similar progress being made by our hotels and Orlando International Airport. Our publicity team landed numerous national media stories promoting reasons to visit Orlando in 2020, member services rolled out “Industry Insights” roundtables, and our sales teams were booking steady business for both leisure and conventions.

In February, as the world’s attention increasingly turned to the emerging coronavirus threat, we enacted a crisis plan that included establishing regular news and social media monitoring; outreach and alignment with key travel industry leaders, health experts and government officials; and ongoing communication with consumers, conventions and clients on destination status and preparedness measures. When our theme parks announced they would close in mid-March, we suspended all our campaigns.

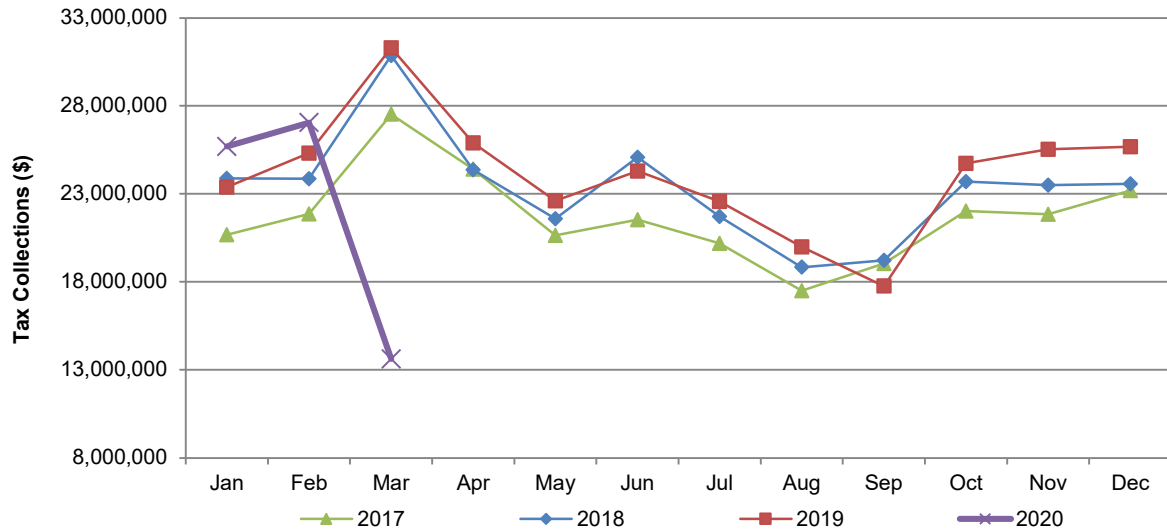
By the end of the quarter, Visit Orlando, like almost every company in the world, had pivoted greatly across all parts of our organization. In convention sales, we worked closely with the Convention Center to reschedule groups for later in the year and in 2021. In marketing and publicity, we launched #OrlandoToGo locally to support of our restaurant industry and nationally kept the Orlando destination top of mind with consumers through a virtual vacation campaign. Locally, we increased even more our communications with area businesses regarding destination updates and research insights. In finance, we began developing a blueprint for operations through the remainder of the year and accomplished this in a remote capacity, having instituted a work-from-home policy in mid-March.

Looking ahead, it is almost certain the second quarter will be even more difficult than the first. But our destination is unique, resilient and beloved by consumers across the world. We have faced multiple challenges in the past, and we will work our way through this current climate together, as we have before.

George Aguel
President & CEO

INDUSTRY PERFORMANCE

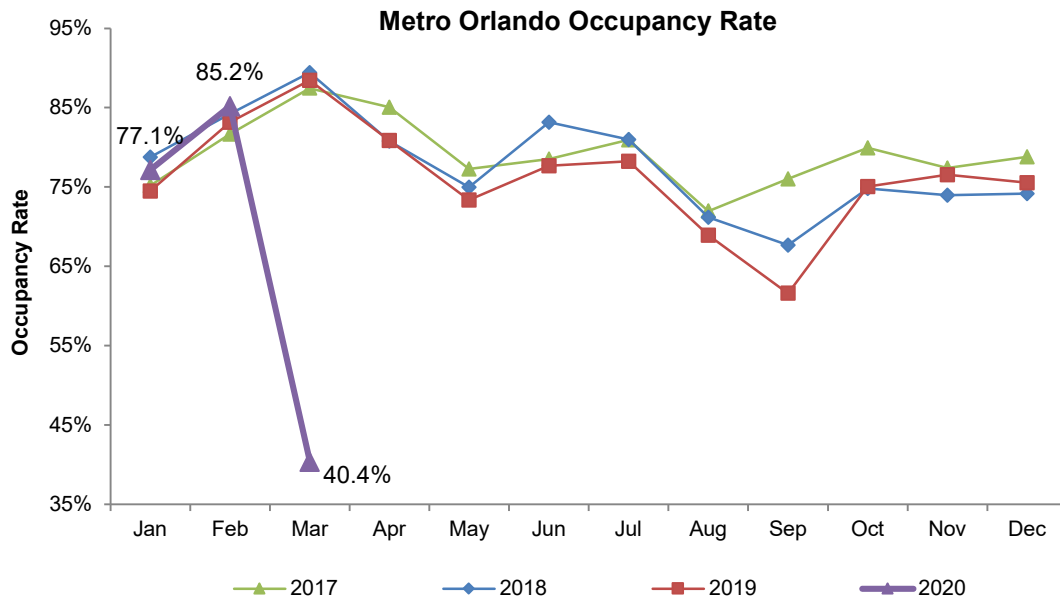
Orange County Tourist Development Tax Collections



Source: Orange County Comptroller's Office

Metro Orlando Lodging Indicators

The following data are based on the January through 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.



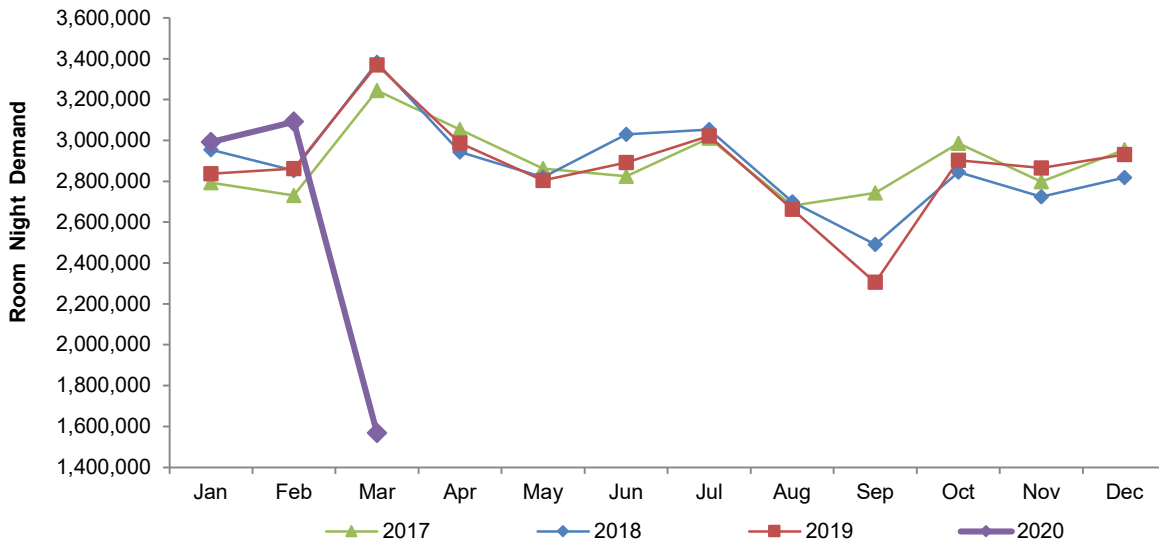
Occupancy

	Q1 2020	Year-to-Date
Orange County	67.7%	67.7%
Metro Orlando	66.9%	66.9%
National	51.8%	51.8%
Florida	66.8%	66.8%

Average Daily Rate

	Q1 2020	Year-to-Date
Orange County	\$143.51	\$143.51
Metro Orlando	\$134.39	\$134.39
National	\$123.76	\$123.76
Florida	\$169.82	\$169.82

Metro Orlando Room Night Demand



Room-Night Supply & Demand (in thousands)

	Q1 2020	Year-to-Date
Supply ¹	11,396	11,396
Demand ²	7,653	7,653

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

Winter and spring are typically one of Visit Orlando's heaviest promotional timeframes. This year, due to developments surrounding the COVID-19 pandemic, all paid media was suspended March 13 to be sensitive to the health crisis. Additionally, marketing, social media, content and digital pivoted toward monitoring search trends, social listening and consumer sentiment to inform our communications. The updates below focus primarily on the first two and a half months of the year:

United States Marketing Campaign

Visit Orlando launched one of our most significant media campaigns, continuing in key inbound markets of New York City, Boston, Philadelphia, Atlanta, Miami and Tampa, plus three new markets (Washington, D.C., Hartford and Chicago) to extend our reach. The campaigns launched Jan. 13 and were scheduled to run through April. They included an integrated media mix of TV, out-of-home and digital, as well as paid social and lead generation. Our layered spring creative strategy was developed to ensure the greatest impact among the following geographical audience segments:

- **Northern Campaign:** Our northern campaign targeted consumers in New York City, Boston, Philadelphia, Washington D.C., Hartford and Chicago. The message focused on "Plan Your Uniquely Orlando Vacation" to drive spring visitation and included high-impact awareness media such as local spot/cable and streaming TV; out-of-home, including sightseeing buses in New York City, Boston and Washington D.C.; digital out-of-home and paid social media. Additionally, we leveraged broadcast integrations with NBC as well as our popular "Escape Winter" sweepstakes to drive travel intent and increase database opt-ins through the first quarter.
- **Southeast campaign:** Our Southeast campaign targeted consumers in our core drive markets of Atlanta and Florida. The message focused on our successful "Eventful Spring" creative campaign promoting top events across the destination, providing consumers a compelling reason to visit now. Direct response media was used to complement Orlando advertising and included streaming TV; digital out-of-home in salons, malls and doctor offices; digital radio; digital display and paid social.

In February, we also launched spring campaigns with Expedia and TripAdvisor to drive incremental room night bookings and shift travel intent from competitors. Combined, our first quarter efforts contributed to a 20% year-over-year increase in impressions and 30% increase in web sessions on VisitOrlando.com. Member cooperative programs promoting special offers complemented all of these campaigns.

Brazilian Marketing Campaign

Brazil's consumer marketing campaign kicked off in mid-February with paid TV, digital, paid social and search engine marketing. For the second year in a row, the campaign targeted families and affluent adults, inviting them to visit Orlando to enjoy leisure and shopping options. Beyond media, consumers received relevant content through monthly e-newsletters.

Canadian Marketing Campaign

Canada's marketing campaign focused on driving destination awareness and selection for the spring travel season. The integrated media schedule consisted of national and cable TV, digital, social media, print and outdoor advertising that included billboards and digital screens at subway stations as well as units in Dundas Square, Canada's version of Times Square. All creative messaging featured warm weather, sunshine and families or couples enjoying their Orlando vacation. Total media impressions generated were over 227 million.

United Kingdom Marketing Campaign

Visit Orlando launched a winter campaign in the UK and Ireland on Dec. 25 that continued through January, providing extensive destination coverage during this key booking period. Over 315 million impressions were generated through an integrated media plan encouraging families to book their 2020 holiday to Orlando. Efforts also reached adults traveling without children, which boosts visitation during off-peak timeframes. A spring campaign kicked off in the UK and Ireland on March 2 to ensure Orlando was top of mind with families during the April/May booking period. The integrated media schedule consisted of national TV, social, digital and a national radio promotion. Beyond media, consumers received relevant content through monthly e-newsletters.

Advertising Campaigns	Impressions	Description
United States	867M	TV, Out of Home, Digital Radio, Social Media, Search Engine Marketing, Print, Digital Display
Brazil	20.3M	TV, Digital, Social Media, Search Engine Marketing
Canada	227M	TV, Digital, Social Media, Search Engine Marketing, Out of Home, Online Video
United Kingdom/Ireland	247M	TV, Digital, Social Media, Search Engine Marketing, Print, Video on Demand

VisitOrlando.com

January – March	Q1 2019
Monthly sessions	4.1M
Total page views	7.9M

E-newsletters

Market	Delivered	Open Rate	Click Through Rate
United States consumer	3,606,118	9.74%	0.55%
Florida consumer	1,094,178	8.63%	0.48%
International consumer	859,440	19.22%	1.54%

Content

The editorial content team produced 25 blogs promoting winter travel, ecotourism, multicultural events, shopping and local events. In February, we spoke at the Orange County Arts & Cultural Affairs Gathering of Festivals, educating festival leaders on ways Visit Orlando can help promote their events at no cost.

Social Media

Our social media efforts have been further integrated within larger marketing initiatives, allowing for content integration across social (paid and organic), our blog and website. A cross-functional editorial calendar was also launched during this time. From a tactical standpoint, the start of the first quarter yielded our highest engagement on Instagram since the channel's launch. Efforts to support National Plan Your Vacation Day and attraction openings contributed to these numbers.

In early March, COVID-19 started to shift the team's priorities to rely heavily on social monitoring and evolving the role of Visit Orlando's social channels to be more of a resource tool than ever before. Social media was leveraged to help answer consumer questions, amplify member updates/information, promote local restaurant deals and unify consumers.

January - March	Q1 2020
Paid + organic impressions (Facebook)	149M
Visit Orlando blog (total page views)	1.06M
Visit Orlando followers (Facebook, Twitter, Instagram)	Secured 66,156 new 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:** To build on the momentum of the OCCC expansion project, we launched a new creative campaign in January called "Expanding

Amazing.” The annual campaign utilizes a series of four high-impact print insertions that will bring renderings to life, as well as a series of dynamic digital banners and email to help spread the word and stimulate business leads. During the first quarter, the campaign included coverage across all major meetings and exhibitions trade magazines, such as PCMA Convene, Successful Meetings, MPI’s The Meeting Professional, Smart Meetings, Convention South, and Black Meetings & Tourism. Ads were supported by an immersive digital campaign consisting of banners, emails, social, and search-engine marketing. It delivered more than 10 million impressions nationally during the first quarter. Also, in January, we joined forces with OCCO to elevate Orlando’s presence at PCMA Convening Leaders in San Francisco, as the exclusive destination partner. This included a presentation to 5,000-plus attendees, an exclusive buyer/client luncheon, a dedicated Orlando VIP area where we were able to serve over 1,800 customers, and exclusive destination branding throughout the show. In addition, Orlando recently ranked No. 2 in the Convention Cities Index, a new annual study by Northstar Meetings Group that ranks destinations based on exhibit space, hotel rooms, affordability and airports.

- **Brand Campaign:** We also used the “Expanding Amazing” theme to launch a brand campaign showcasing all that’s new across the destination, including our airport expansion, new hotels and unique meeting experiences. The campaign included two-page editorial spreads in major meetings trade magazines such as Meetings & Conventions and Meeting Mentor, along with an integrated digital strategy of display banner ads, email, search engine marketing and paid social targeting meeting professionals. The campaign delivered over 5.7 million print and digital impressions during the first quarter.
- **Convention Co-op Campaign:** To educate meeting professionals on all that’s new in Orlando, we continued our popular Orlando Destination Guide, a 24-page custom insert included in eight trade magazines throughout the year, along with an annual integrated digital program to promote partner offers. In addition, a comprehensive collection of digital banners and paid social ran on programmatic ad networks targeting meeting professionals based on online behavior, searches and interactions with our website, driving significant traffic to our partner websites. The campaign delivered 9.7 million print and digital impressions during the first quarter.

GLOBAL COMMUNICATIONS

Media Publicity

The team kicked off a PR campaign promoting reasons to visit in 2020, including spring break and new additions and things to do.

- Visit Orlando secured a significant amount of national publicity in the critical U.S. market, including coverage on the Weather Channel, [MSN.com](#), [USA Today](#), [HGTV.com](#), and [Reader's Digest](#). Heavy media relations efforts promoting spring travel to Orlando resulted in articles by [MSN.com](#), [USA Today](#) and leading lifestyle news site [PopSugar.com](#). To promote Orlando as a top destination for Canada's March break, the team secured major stories on [CTV Ottawa](#), [Globe & Mail](#) and 46 stories syndicated throughout Sun Media publications, including the [Toronto Sun](#) and [National Post](#).
- In our No. 1 overseas market of the UK, we landed coverage in top newspapers The Sun, [Sunday Mirror](#), [Daily Star Sunday](#) and Irish Sunday Mirror, as well as a Hello! Magazine feature on [Things to do with kids in Orlando](#), as the result of a group media fam. Orlando was named "Best Value Long-Haul Break" for a winter sun break in the UK Post Office Travel Money report, which created coverage promoting the value of an Orlando vacation in major outlets like [Daily Mail](#), [Travel Weekly](#), [Daily Express](#) and [Yahoo News UK](#).
- In Brazil, we secured stories on the "What's New" theme in leading outlets such as [MSN Brazil](#), [UOL Viagem](#) (a top digital tourism website), [Catraca Livre](#) (news and tourism website) and [Estadão – Viagem](#) (one of the country's most-read national tourism newspapers).
- In Mexico, four TV segments aired with "Sale el Sol," a show similar to Univision's "Despierta America," showcasing our theme parks and attractions, adventure activities and places to stay. The segments resulted from a shoot Visit Orlando coordinated in our destination in December.

To promote Orlando's meetings and conventions capabilities, first-quarter PR results included an Orlando update for [Prevue's](#) January Florida guide and two-page feature in [Aspire](#) on how Visit Orlando's Magical Dining supports worthy causes in our community.

As the first quarter progressed, publicity efforts quickly transitioned to issue management as the coronavirus started to impact our country and, inevitably, our own destination. The team managed messaging and requests/interviews around the potential impact of coronavirus to Orlando's travel and tourism industry with consumers, conventions and clients on our destination's status and preparedness measures. Activities included creating and regularly updating Healthy Travel pages on the Visit Orlando consumer and media sites, while working closely with our destination services team and the Orange County Convention Center to help clients with questions and concerns. This included developing custom messaging for current and upcoming events, especially around our destination's preparedness.

In the first quarter, we serviced 87 requests for media, members and clients, including local and national media outlets ranging from the Orlando Sentinel to Fox News national to the Associated Press. The team

also worked to shift plans on proactive media relations to adapt to the significant changes to travel, developing stories such as virtual tours to Orlando, setting the stage for continued similar efforts into the second quarter.

January - March	Q1 2020
Impressions public relations	2.37B

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, regular LinkedIn posts and our community and industry e-newsletter, Tourism Matters. Before the advent of social distancing, we conducted presentations to business and community groups that included the Greater Orlando Builders Association, Simon Properties and the International Drive Chamber of Commerce, as well as UCF Rosen College of Hospitality Management students, educating them on the positive impact of our region’s travel industry.

As COVID-19 became more of an issue, we doubled the frequency of our communications to share destination updates, research, and resources for businesses and workers. President & CEO George Aguel gave presentations to Visit Orlando’s board of directors and Orange County’s Tourist Development Council on the emerging threat, and he appeared alongside Mayor Jerry Demings at a press conference in early March. As an organization, we continued to work closely with the mayor and other county leaders to implement and adjust the crisis plan we had been developing since late January.

MEMBER RELATIONS

The membership team began the year focused on delivering relevant educational and networking opportunities for members to make meaningful business connections. We held seven member events, including member orientations; a “Power Hour” lunch with Thomas Chatmon, executive director of the Downtown Development Board; and our 14th annual professional networking event at Pointe Orlando. In addition, we launched a new initiative, Industry Insights Roundtables, where members from accommodations, attractions and restaurants participated in roundtable discussions and shared best practices and innovative solutions with their peers. For the first quarter, Visit Orlando hosted more than 900 attendees from 450 companies.

CONVENTION SALES & MARKETING

Visit Orlando secures two types of meetings and convention 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 89,253 attendees for the Orange County Convention Center, which will generate over \$229 million in economic impact.
- **In-House:** The sales team secured future meetings and conventions with an estimated 127,175 attendees for Orange County hotels, which will generate over \$193 million in economic impact.

Citywide Production

January - March	Q1 2020
Future attendance ¹ secured	89,253
Estimated room nights ²	196,357

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

January - March	Q1 2020
Future attendance secured	127,175
Hotel room nights	262,463
Hotel leads	683

Citywide Sales Key Bookings

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

- Assemblies of God: 23,000 attendees, August 2021
- International Dairy Deli-Bakery Association: 10,600 attendees, June 2026
- Society of Critical Care Medicine: 6,000 attendees, February 2025
- Dell Company: 5,250 attendees, August 2020
- Florida United Numismatists Inc. Summer FUN: 5,000 attendees per year, July 2022, 2023, 2024
- Key Media and Research Auto Glass Week: 2,500 attendees, September 2020

Hotel Key Bookings

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

- AmerisourceBergen ThoughtSpot: 12,500 room nights per year, July 2022 and 2024
- AbbVie National Services Meeting: 4,500 room nights, September 2020
- HPN Confidential Client: 4,500 room nights, November 2024
- Academy of General Dentistry Scientific Sessions: 3,700 room nights, July 2022
- Xylem Inc Annual Conference: 3,600 room nights, November 2023

Rescheduling Conventions

In conjunction with the Orange County Convention Center, our sales team worked hard to reschedule groups that were forced to cancel their conventions. As of March 31, of 36 impacted groups, 16 had chosen to meet later this year; that represents an estimated economic impact of \$378 million.

Unfortunately, 18 groups canceled altogether, meaning a loss of \$507 million in economic impact.

Meanwhile, we received verbal commitments from four groups (combined attendance 157,705, economic impact \$318 million) on contracts for future years. At the same time, another three conventions (121,500, economic impact \$282 million) were considering dates between summer 2020 and December 2021.

Direct Sales Activities

Activity	Total Number	Total Participants
Tradeshows	5	1,333
Missions	1	63
Client Events	2	14

- Visit Orlando staff and member companies attended PCMA Convening Leaders, along with an estimated 4,000 participants. The group's membership consists of meeting professionals, CEOs, and suppliers for the meetings and convention industry, and the event allows Visit Orlando to solicit future business and interact with industry decision-makers.
- To increase destination awareness and find new meeting prospects for Orlando, our meetings and conventions team hosted a sales mission in Philadelphia that featured two high-impact events. We joined 13 members to engage and network with 80 new and existing clients in the medical and pharmaceutical meeting industry.
- Convention sales attended the Financial & Insurance Conference Planners Symposium in January. FICP provides access to education, experience and resources targeting the needs of financial services and insurance meeting planners from across North America. This annual event draws more than 600 planners and hospitality partners.
- Visit Orlando attended the Religious Conference Management Association (RCMA) show in Texas in February. RCMA is a professional, nonprofit, multifaith organization consisting of individuals responsible for planning and managing meetings, tutorials, conferences, conventions and assemblies for their religious organizations.
- Visit Orlando attended Destination Showcase in Washington, D.C., in February, a free event for meeting planners to network with over 150 destinations from around the world.

- Convention sales met with 24 meeting planners focused on the multicultural and LGBTQ meetings and events industry at Connect Diversity in Orlando. This three-day event featured training workshops and scheduled appointments where RFPs are discussed, and relationships are developed for current and future business.
- Our chief sales officer attended the Lake Nona Impact Forum with high-level clients representing the American Academy of Optometry and North American Veterinary Community. This forum provides an opportunity for leaders to discuss wellness, innovation, technology and education in a unique and collaborative environment.

Destination Meeting Services

The destination services team conducted 107 client site visits and client meetings in the first quarter, as well as 38 member site visits and meetings.

January - March	Q1 2020
Service leads issued ¹	149

¹ A lead is where a client has asked us to submit its information to our members. Members can then respond with their proposal directly to the client.

TRAVEL INDUSTRY SALES

We hosted a series of educational seminars in Germany and Switzerland, in collaboration with TUI and FTI airlines, educating over 200 travel agents and owners. We also joined members at the Discover America Denmark USA Travel Show, which brings together top players in the travel industry to discuss trends, innovations and opportunities to grow visitation from the Nordic region. Upward of 200 travel agents from Denmark, Sweden and Norway were trained.

Domestic in-market activity consisted of the InteleTravel Conference and Tradeshow in Las Vegas in February, with 2,500 agents in attendance. Training classes for over 1,000 travel professionals were conducted, along with one-to-one meetings with agency owners. In addition, more than 600 participated in an online training session held in partnership with Disney. The webinar was posted on YouTube and reached more than 1,500 travel professionals.

January - March	Q1 2020
Travel professionals trained (in-person and online)	6,037
Travel professional sales calls	581
Travel professional events (tradeshows, missions, destination orientations)	9