

Impact and Activities During COVID-19 Pandemic

Facing the economic fallout of a global pandemic that halted travel and dramatically changed social behavior, Orlando's tourism industry was impacted in unimaginable ways during the second quarter of 2020. Across the industry, key indicators plummeted to unprecedented levels, from air travel and hotel occupancy to convention attendance. In addition, most of our destination's theme parks and attractions remained closed through early June, with Disney's four parks not reopening until mid-July.

At Visit Orlando, we began the quarter by continuing to address the immediate business needs of our local community, at the same time keeping our destination top of mind for when consumers could travel once again. Marketing and publicity efforts included record-setting campaigns that featured virtual tours, Zoom backgrounds and virtual learning opportunities, with a focus on domestic consumers. Our "Orlando to Go" dining campaign, which launched in late March and ran for five weeks, grew to support over 500 restaurants and included a partnership with Orange County to promote #407Day and #407Dates.

In mid-April, as high levels of unemployment continued, we launched an online Tourism Help Hub to connect the area's many tourism-supported businesses and employees with resources, research, relief and revenue programs to navigate the evolving impact of COVID-19. Around this time, I was also fortunate to co-chair the Orange County's Economic Recovery Task Force, working with Mayor Demings and 50 of our region's top business and community leaders on a measured, phased approach to restarting the local economy in a safe manner. At the request of Mayor Demings, Visit Orlando also co-chairs coordination of the multi-county safety communications campaign "Safer, Stronger, Together" to encourage compliance from local business owners, employees and customers through donated ad space, news coverage, social media and a campaign website.

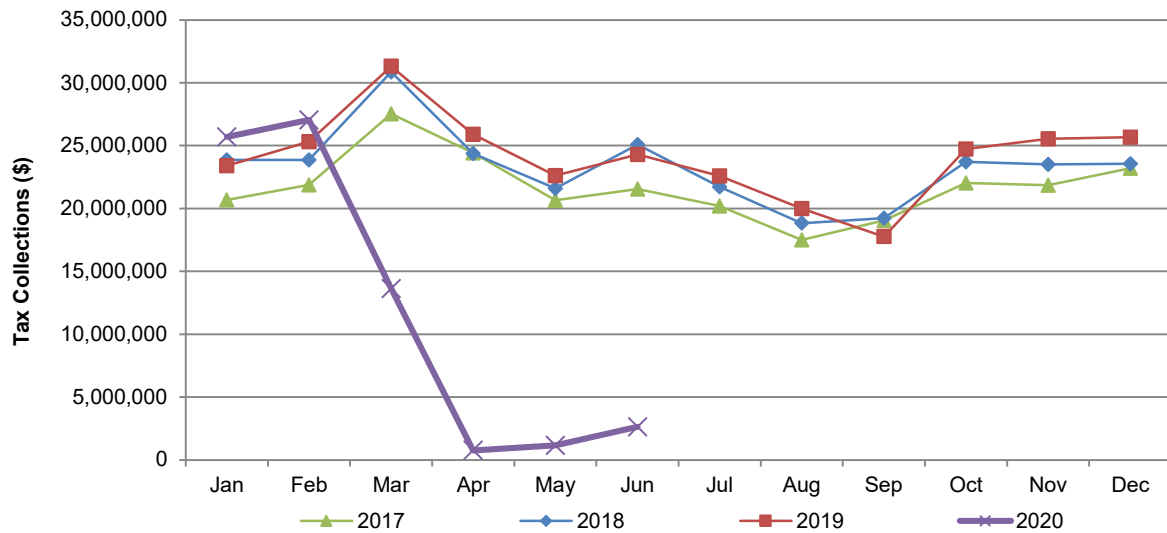
With the industry's ability for in-person meetings extremely limited, all tradeshows, missions and in-person client events were paused. To stay engaged with members, clients, travel professionals and colleagues across the globe, we conducted webinars and virtual coffee chats with thousands of clients. Our convention sales team focused on working with meeting and event planners to reschedule canceled events, and in the second quarter they secured future business that will result in an estimated 291,000 attendees and \$423 million in economic impact.

Looking ahead, our research indicates we can expect a slow, steady path to recovery. To aid that recovery, Visit Orlando is actively promoting and selling the destination to consumers, media, the travel industry and convention organizers to support our local businesses and community.

George Aguel
President & CEO

INDUSTRY PERFORMANCE

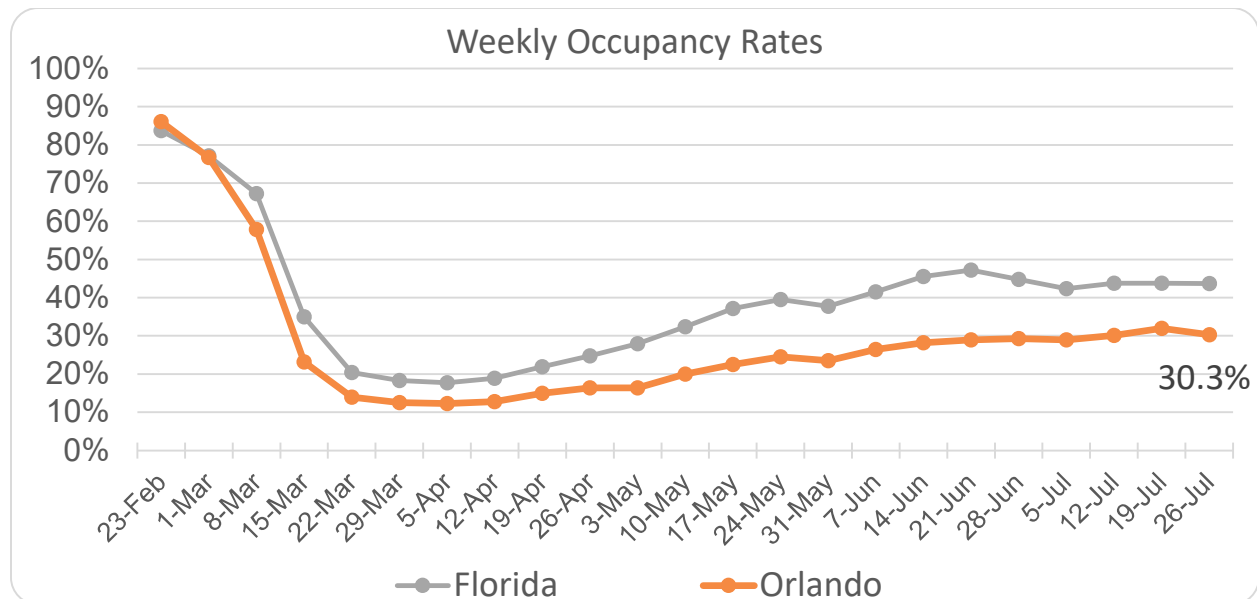
Orange County Tourist Development Tax Collections



Source: Orange County Comptroller's Office

Metro Orlando Lodging Indicators

The following data are based on weekly occupancy results reported by STR. Please note this 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

	Q2 2020	Year to Date
Orange County	20.9%	51.5%
Metro Orlando	21.9%	50.1%
National	33.5%	43.1%
Florida	33.0%	51.8%

Average Daily Rate

	Q2 2020	Year to Date
Orange County	\$75.19	\$134.08
Metro Orlando	\$70.93	\$124.18
National	\$83.55	\$109.04
Florida	\$102.11	\$150.87

VISIT ORLANDO ACTIVITIES

GLOBAL MARKETING

“Take A Break” Campaign

With the goal of keeping Orlando top of mind as stay-at-home orders took effect in March, Visit Orlando launched our “Take a Break” campaign to highlight the many virtual tour experiences available on VisitOrlando.com and member websites, including chef demonstrations and animation lessons, as well as the creation and distribution of Orlando-centric Zoom backgrounds. The campaign delivered virtual content to consumers worldwide through social media, e-newsletters, webinars, and national and international media coverage. Virtual tours and experiences allowed consumers to navigate Orlando’s most sought-out locations, from theme parks and attractions to hotels and shopping, on any mobile device, tablet, computer or VR headset. The success of this campaign was measured through engagement and traffic to VisitOrlando.com, which recorded the highest average time on our website. Engagement rates with our destination’s virtual tours included over 200,000 user sessions and 1.3 million scenes visited, as well as our highest-ever e-newsletter open rates.

“Orlando To Go” Campaign

“Orlando To Go” featured more than 500 local restaurants and supported our community by encouraging residents to take advantage of takeout and delivery options during quarantine. Restaurants were appreciative and provided positive feedback throughout the five-week program. Consumers spent a higher-than-average time on our website, and select consumer emails achieved a strong click-to-open rate. Clear Channel Outdoor, Cox Media Group, I-Drive Business District and OpenTable all provided added-value media coverage. In later weeks, the campaign evolved to promote #407Day and #407Dates in conjunction with Orange County. Those initiatives promoted the idea of date nights and provided virtual entertainment options to pair with takeout.

Orlando Pride Month

In June, many of Orlando’s LGBTQ+ events shifted to a virtual format while others pushed their events to later in the year or 2021. We supported Pride Month on social media with daily rainbow-colored images leading up to the Pulse remembrance anniversary, along with content updates to our Visit Orlando LGBT website. Social posts surpassed 651,000 impressions.

“Orlando Awaits” Campaign

In June, as lockdown restrictions began to ease and people were ready to venture out again, we launched the second tier of our phased recovery plan with our “Orlando Awaits” campaign. The purpose was to inform consumers of new safety measures across our destination while inspiring trust and building confidence in our theme parks, attractions and hotels. We launched a dedicated landing page to communicate our history of prioritizing guest safety, the safety measures put in place by our trusted

brands, and the status of tourism operations by category. The campaign was supported with an e-newsletter to our domestic and Florida-resident databases along with social and publicity efforts.

VisitOrlando.com

April - June	Q2 2020	Year to Date
Monthly sessions	1.09M	5.2M
Total page views	2.3M	10.2M

E-newsletters

Market	Delivered	Open Rate	Click Through	Click to Open
United States consumer*	2.3M	8.4%	0.6%	7.1%
Florida consumer	371,205	12.5%	0.7%	5.7%
International consumer	259,565	25.8%	4.3%	16.5%

Content

Visit Orlando's content team provided support to various marketing campaigns including "Welcome Back" (seven blogs), "Take a Break" (four blogs), "Orlando To Go" (four blogs) and Pride Month. Blogs were supplemented by 11 consumer and meetings e-newsletters, as well as three new landing pages and 128 updated pages.

Social Media

Our social media team continued to focus on organic efforts promoting various programs and communicating to our audience. In addition to monitoring comments and sentiment on social media channels and creating relevant content around what fans were seeking, we developed the #TakeMeBackToOrlando campaign to keep Orlando top of mind and allow consumers to share their nostalgia and passion for our destination. As part of this campaign, we leveraged videos of fans' favorite memories in Orlando to create authentic, user-generated content.

April - June	Q2 2020	Year to Date
Paid + organic impressions (Facebook)	19.5M (all organic)	168.4M (paid and organic)
Visit Orlando blog (total page views)	191,079	1.26M
Visit Orlando followers (Facebook, Twitter, Instagram)	Secured 15,013 new followers	81,169 new followers

Convention Marketing Update

In collaboration with the sales team, convention marketing embarked on a retooled client communication strategy focused on owned and earned channels to keep Orlando top of mind as Cvent's No.1 meeting

destination in the United States. This included the implementation of biweekly “Meetings Matter” e-newsletters to over 30,000 subscribers, providing relevant and timely destination updates. Additional touchpoints included sharing Orlando’s latest news, virtual tours and editorial content via OrlandoMeeting.com, customized delegate sites and dedicated social media channels. All site traffic metrics significantly increased vs. the same time last year. We were also able to secure industry exposure in the Meetings Today “Stay Safe” campaign, and we received print and digital exposure in Aspire Magazine in collaboration with the Orange County Convention Center.

GLOBAL COMMUNICATIONS

Publicity

Given the pandemic-related travel restrictions, we shifted our publicity efforts to three main areas of need:

1. Keeping Orlando top of mind with domestic consumers for future travel by securing positive stories, including virtual experiences.
2. Supporting local businesses with resources and promotions targeted to area residents.
3. Managing messaging and media responses around convention cancellations and rebooking.

We used our collection of virtual tours on VisitOrlando.com to keep our destination positioned positively in media headlines during the initial shutdown. This resulted in 350 stories and record earned media impressions for any campaign (1.4 billion). National and international coverage included MSN, Buzzfeed, Travel + Leisure, Forbes, Good Housekeeping, Brides, E News Online, MSN Canada, Toronto Star, El Heraldillo (Mexico) and UOL (Brazil), as well as an Orlando Sentinel story syndicated in over 30 outlets across the country.

As the destination moved toward reopening, we began pitching media on new and enhanced safety precautions. As a result, we secured two national syndicated stories: one from Tribune newspapers that was picked up by [MSN.com](https://www.msn.com) and multiple U.S. papers, and one from [CNN](https://www.cnn.com) with 11 additional syndicated stories, including [CNN en Español](https://www.cnn.com/espanol). Other coverage highlights included UK’s [Sunday Mirror & Sunday Star](https://www.sundaymirror.com), [Fodors](https://www.fodors.com), [Florida Trend](https://www.floridatrend.com) and [Tampa Bay Metro](https://www.tampabay.com).

To support our organization’s efforts to maintain relationships and increase training with travel advisers in the U.S. and Canada, the publicity team secured coverage in travel trade media on Visit Orlando’s newly created travel adviser webinar series. Stories ran in [Travel Weekly](https://www.travelweekly.com), [Travel Week Canada](https://www.travelweekcanada.com), [Recommend](https://www.recommend.com) and [TravelPulse](https://www.travelpulse.com).

We also developed and/or promoted several initiatives to support local business, many in close partnership with Orange County:

- **Tourism Help Hub:** Created Visit Orlando's Tourism Help Hub, securing more than 20 stories from outlets such as WKMG, WESH, News 13 and Orlando Business Journal.
- **Orlando to Go and #407Day:** Promoted Visit Orlando's takeout/delivery dining program with strong publicity efforts and extended those efforts in collaboration with Orange County to create the #407Day campaign. This campaign used the area's longtime area code and April 7 (4/07) as a hook to encourage residents to support local restaurants. We secured 116 stories, including 95 broadcast stories across local TV and radio, on stations such as FOX 35, WMFE 90.7, WKMG, WESH/CW 18 and more. There were 21 online stories, including a pickup of the Orlando Sentinel feature on [MSN.com](#) and a "Breaking News" story on the Sentinel's homepage.
- **#407Dates:** Following the success of #407Day, we launched #407Dates, pairing virtual events with delivery/takeout options for residents. The team secured more than 50 stories, heavily weighted with broadcast including: [WESH](#), WFTV, News 13, WDBO, CW 18, WKMG, [Tasty Chomps](#) and El Sentinel.
- **Safer, Stronger, Together:** Teaming up with Orange County and the Orlando Economic Partnership, we developed a regional branding campaign to promote health and safety guidelines for local businesses and residents. The campaign has secured over 575 free donated ads to run each week across the region in TV, radio, outdoor billboards, highway signage and at the airport. Additionally, the campaign is reaching consumers through 95 publicity and news stories at both local and national and levels, including TIME, Bloomberg, Yahoo and MSN.com, resulting in 1.2 billion potential impressions. Publicity for this program will continue into the third quarter.

In the second quarter, we serviced 75 requests for media, members and clients, including local and national media outlets ranging from CNN and The New York Times to CNBC, the Washington Post and Miami Herald. We also worked to manage communication and media requests around cancellations and rebooking for Orlando's meetings and convention industry. Resulting stories included [The Meeting Professional](#) highlighting Visit Orlando's work locally and [Northstar](#) sharing virtual tours with planners.

Industry Communications

As the situation progressed with COVID-19, we continued to increase the frequency of our corporate communications. During the second quarter, we produced 17 e-newsletter and special messages sharing destination updates, research, and resources for businesses and workers. In addition, we shared key takeaways from Orange County government press conferences, and President & CEO George Aguel gave presentations to Visit Orlando's board of directors and Orange County's Tourist Development

Council. As an organization, we continued to work closely with the mayor and other county leaders to implement and adjust our hurricane crisis plan.

MEMBER RELATIONS

The membership team began the year focused on delivering relevant educational and networking opportunities for members to make meaningful business connections. This effort continued into the second quarter, even with the impact of COVID-19, when the team quickly transitioned key member initiatives, including member orientation and educational programs, to a virtual platform. In the second quarter, membership hosted nearly 4,000 virtual attendees across a series of webinars. We leveraged our network of professional industry leaders from organizations such as Northstar Meetings Group, PCMA, the International Association of Exhibitions & Events, the Global Bio Risk Advisory Council, Google, Facebook and MMGY to inform, inspire and guide them and their businesses during unprecedented times.

We continued to proactively engage members with more than 2,300 contacts, a 34% increase over the same quarter last year. Significant effort was made to showcase and support over 500 restaurants (including 117 member restaurants) through the “Orlando To Go” program, as well as help promote businesses that remained open through special offer programs including Orlando deals, member-to-member offers and social media platforms. We tracked member hotel and attraction openings and launched the “Member Safety Information Initiative,” making important information available to consumers via enhanced listings. In preparation for Magical Dining, we held multiple focus groups with restaurants in each district to ensure we were adapting this year’s program to the unique environment.

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 91,000 attendees for the Orange County Convention Center, which will generate over \$233 million in economic impact.
- **In-House:** The sales team secured future meetings and conventions with an estimated 200,200 attendees for Orange County hotels, which will generate over \$190 million in economic impact.

Citywide Production

April - June	Q2 2020	Year to Date
Future attendance ¹ secured	91,000	180,253
Estimated room nights ²	200,200	396,557

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

April - June	Q2 2020	Year to Date
Future attendance secured	38,035	164,710
Hotel room nights	106,428	367,926
Hotel leads	286	964

Citywide Sales Key Bookings

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

- American Sportfishing Association: 15,300 attendees, July 2026
- Color Street: 8,000 attendees, July 2021
- ASI Show: 7,000 attendees, January 2026
- Florida State Junior Thespians: 6,000 attendees, February 2021
- Society of Toxicology: 6,000 attendees, March 2025
- Jeunesse: 5,000 attendees, January 2021
- Everything Under the Sun Expo: 5,000 attendees, February 2023
- Prospanica: 3,500 attendees, September 2021
- Auto Glass Week: 2,500 attendees, January 2021
- Yu-Gi-Oh! World Championships: 2,500 attendees, November 2020

Hotel Key Bookings

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

- American Osteopathic Association: 6,000 attendees, October 2023
- Healthcare Quality Week: 2,000 attendees, September 2021
- Dance Team Union: 2,000 attendees, February 2021
- Kronos: 2,000 attendees, October 2023
- Coupa Software: 1,500 attendees, September 2020
- International Association of Administrative Professionals: 1,500 attendees, July 2023
- Regeneron Pharmaceuticals: 1,450 attendees, February 2021

- Teva Pharmaceuticals: 1,450 attendees, February 2022
- Novartis Pharmaceuticals: 1,415 attendees, February 2022
- Enterprise Holdings Partners in Business: 1,405 attendees, May 2024

Destination Meeting Services

The destination services team paused client site visits and client meetings in the second quarter due to the COVID-19 situation.

April - June	Q2 2020	Year to Date
Service leads issued¹	30	179

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

The travel industry sales team hosted a series of educational webinars in conjunction with key clients and members, including CVC, Agaxtur and Hoteldo in Brazil and Travel Impressions, Dream Destinations and Best Day in Mexico. We also participated in a virtual trade show in collaboration with Travel Brands, one of the largest travel companies in Canada, showcasing the destination and educating over 250 agents. In June, Visit Orlando and members launched a three-part webinar series reaching thousands of travel professionals, consortiums and agencies. The series provided a platform for key stakeholders to connect with leisure sales professionals, showcase their products and provide updates on recovery plans. In addition, online virtual training has made significant strides to ensure the Orlando brand is top of mind as international leisure sales recover. Year to date, we've trained over 11,000 travel professionals and continue to ensure client sales calls are conducted consistently within core markets.

April - June	Q2 2020	Year to Date
Travel professionals trained (in-person and online)	6,037	11,176
Travel professional sales calls	581	630
Travel professional events (tradeshows, missions, destination orientations)	9	9