



Visit Orlando®

State of the Industry | Marketing | Conventions | Strategic Plan | Visit Orlando's
Magical Dining

Q3 TOURIST DEVELOPMENT COUNCIL: SEPT. 24, 2021



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State of the Industry



Consumer Sentiment

Delta variant still a factor, but outlook growing stronger

89% have travel plans in the next six months
(37% still planning travel in October-December)

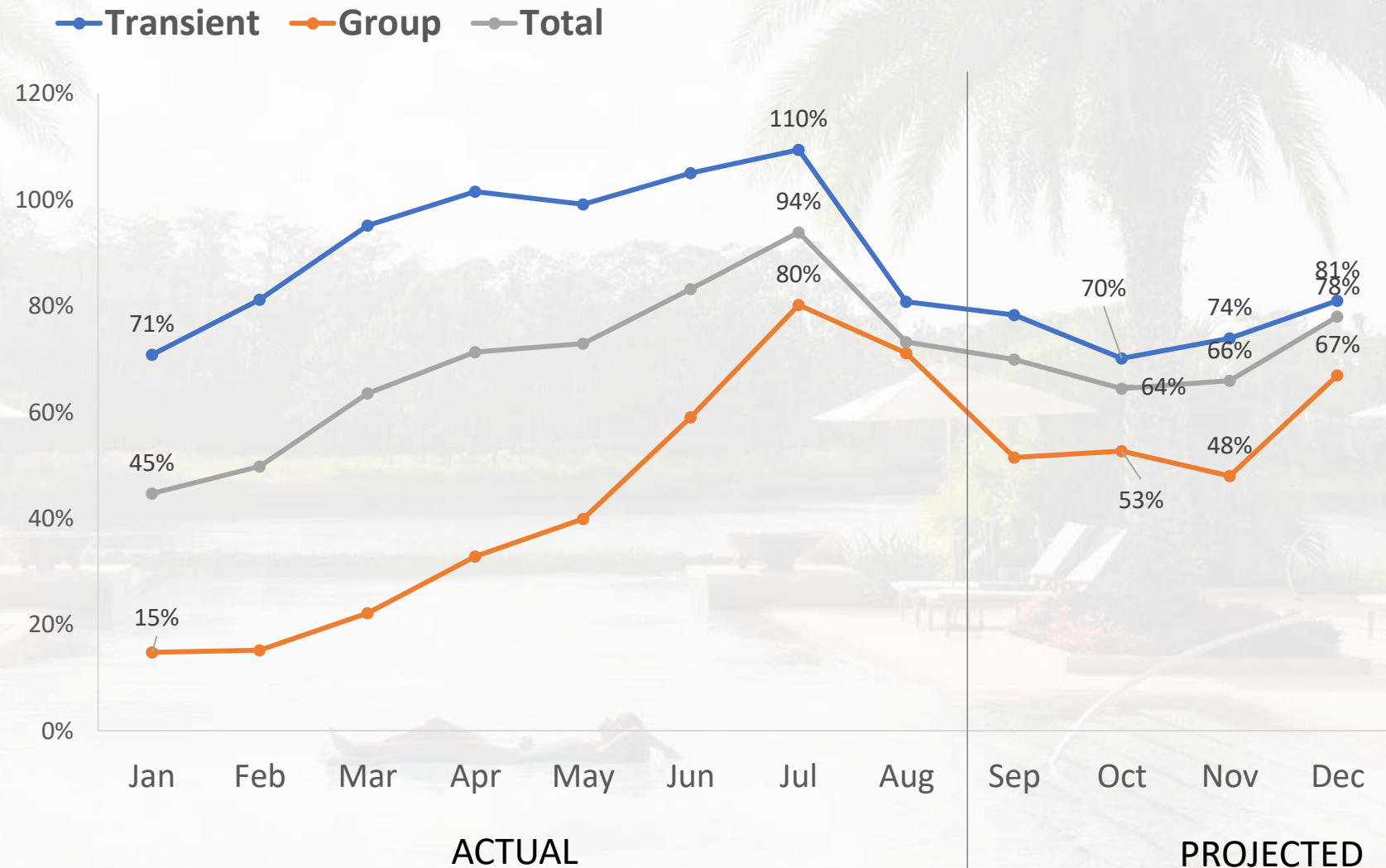
68% are excited to take a getaway trip in the next month
(up from 61% in early August)

65% are open to learn about travel destinations
(up from 54% in early August)



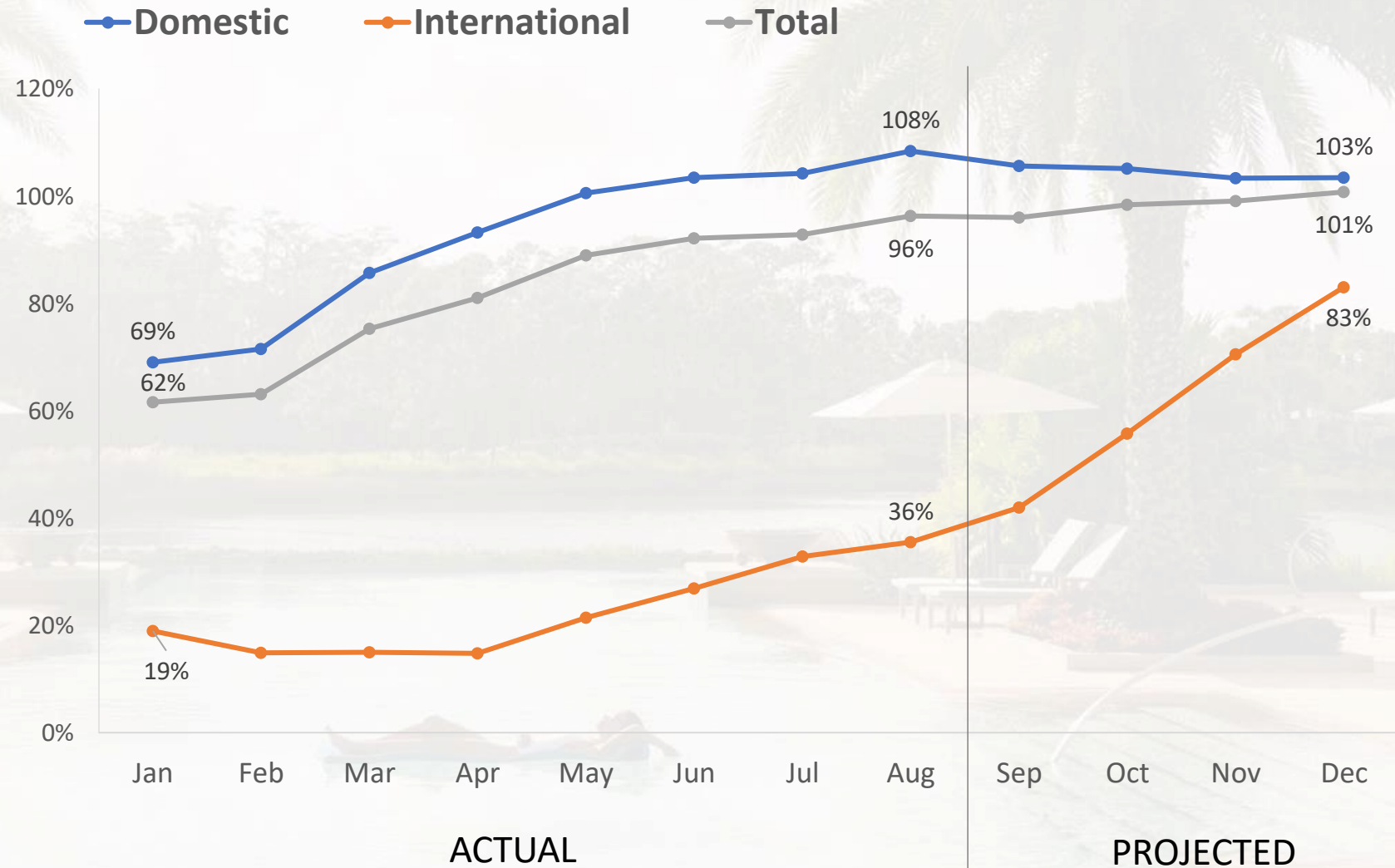
Hotel Recovery

Metro Orlando demand, as a percentage of 2019



Air Travel Recovery

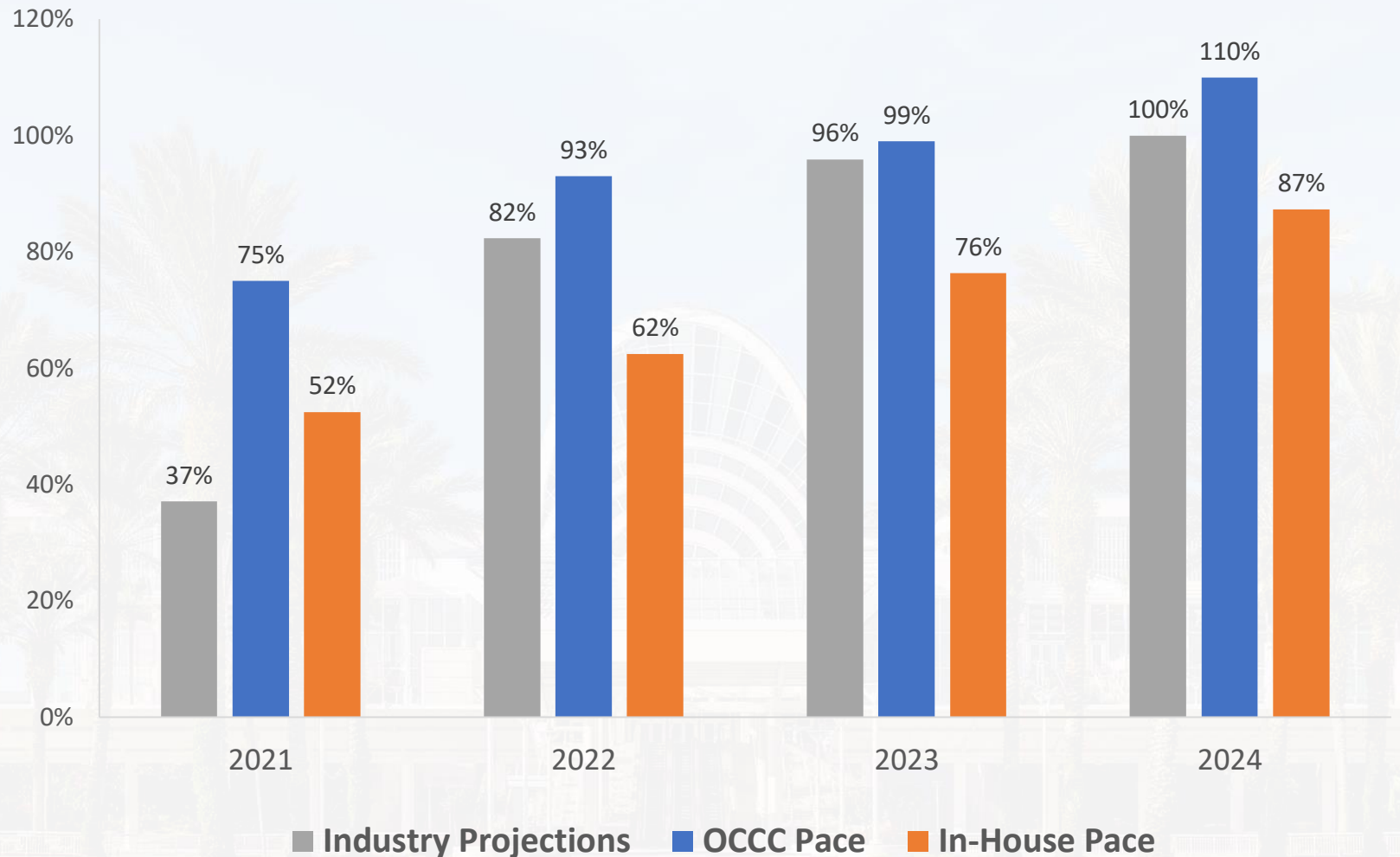
MCO seat capacity, as a percentage of 2019





Conventions Recovery

Projected attendance, as a percentage of pre-pandemic levels





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Marketing: USA

Fall Media Plans

Linear + streaming TV

- Six weeks in top 7 out-of-state markets: New York, Philadelphia, Chicago, Dallas, Houston, Charlotte, Atlanta

Digital display, paid social & paid search

- Targeting east of Mississippi + TX
- Increased focus on Florida
- Heavy-up in September/October

New

Programmatic/digital out-of-home

- New York, Philadelphia, Chicago, Dallas, Houston, Atlanta

New

Multicultural campaign



Multicultural Media Plan Overview

U.S. Hispanics



New York, Miami, Houston,
Dallas, Chicago, Atlanta

African Americans



Atlanta, New York, Washington DC,
Philadelphia, Richmond, Dallas,
Baltimore, Houston, Charlotte

LGBTQ+

EDGE MEDIA NETWORK



New York, Houston, Dallas, Chicago,
Atlanta, Philadelphia, Charlotte

* Represents 8% of fall media budget

Partnerships & Special Programs

Elevating Orlando as a top travel destination



Publicity

Adjusting our message by market

Local

- Consistent updates on state of tourism and Visit Orlando's efforts to drive recovery
- Visit Orlando's Magical Dining; staycations

Florida

- Reasons to visit (fall events, holidays, etc.)
- Utilize influencers to showcase the experience

National

- Balance reasons to visit and safety
- Influencers to showcase the experience



TIME

WORLD'S GREATEST PLACES 2021

Orlando

The magic continues



"No matter how often you visit, there's always something new to experience..."

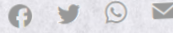
Condé Nast
Traveler

"A robust and incredibly varied restaurant scene has put Orlando on the foodie map."

The New York Times

U.S. to Lift Travel Ban on Vaccinated Visitors

Zolan Kanno-Youngs and Mark Landler · 1 hr ago



Like



196 Comments



721

TRAVEL WEEKLY

“We are ready to safely welcome back international visitors to experience the exciting new developments that have continued taking place in the Theme Park Capital of the World.”

– Visit Orlando

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Marketing: International

ORLANDO *Imagine 2022!*





Mexico

Key observations

Mexican consumers are very open to int'l travel – they never really stopped. Competition is fierce, particularly for younger travelers. Communicating to family and non-family segments is important.

Visit Orlando strategy

- Drive short-term bookings with “Las Sorpresas te Esperan” campaign, Sept. 1-Nov. 30
- Hosting influencers and media
- Co-ops with AeroMexico and Price Travel





Canada

Key observations

Canadians ready to travel but prefer in-market trips (safety top concern). However, interest is on the rise for booking future travel.

Visit Orlando strategy

- Target travel intenders to “plan now” for Q1 trips, with Wonder Remains campaign, Aug. 26-Dec. 31.
- Work with in-market spokespeople on broadcast opportunities to promote winter travel
- Virtual travel industry sales outreach





United Kingdom

Key observations

Brits eager to travel abroad, but 2021 activity is limited. Competition is intense, particularly from short-haul destinations. Staying top of mind is key to secure future market share.

Visit Orlando strategy

- Inspire future travel with The Wonder Remains marketing campaign, Aug. 30-Jan. 31
- Reinstated in-market PR representation
- Virtual travel industry sales outreach





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Conventions



Visit Orlando

23,675 followers

1d • 🌐

in

Over 100 events already this year at the GBAC reaccrated Orange County Convention Center. With new hotels, dining and entertainment, it's time to rediscover Orlando!



Orlando is Enhancing Amazing!

orlandomeeting.com • 1 min read

👍 🌱 18

Reactions



New Strategies to Reach Planners

➔ “Enhancing Amazing” LinkedIn campaign highlights our success hosting in-person events

≈ Customer testimonials

*“It is such a pleasure to be in a city where **meetings mean business** ... a city that recognizes the value that organizations bring to the city.”*



Michael Martin, President & CEO, National Wood Flooring Assoc.

Science

Proves:

Attending a professional meeting or event is *safer* **than some everyday activities.**

In fact, there's a **NEAR-ZERO** risk of COVID-19 transmission for attendees—even at **LARGE EVENTS.**

Source: Exhibitions and Conferences Alliance and Epistemix

Meetings and events are **HAPPENING NOW** and they're happening *safely.*

Let's **Meet** *There*





Recent Customer Events

Marriott
INTERNATIONAL



Connect TRAVEL
MARKETPLACE



HB | HELMSBRISCOE

Visit Orlando

Upcoming Sales Efforts

Live Industry Shows



Nov. 9-11
Las Vegas



Dec. 7-9
Philadelphia



Dec. 14
Chicago



INTER[action] 2021
Dec. 14-17
Atlantic City

Sales Missions

Oct. 23
Mid-Atlantic

Dec. 1-2
New Jersey &
Pennsylvania

Dec. 8
Florida (Tallahassee)



A photograph of two men in a kayak on a calm river, surrounded by dense tropical foliage. The scene is misty, with a soft, ethereal light filtering through the trees. The man in the foreground is wearing a light blue shirt and has a beard, looking towards the right. The man behind him is wearing a white shirt and has red hair, also looking forward. They are both holding black paddles. The water is dark and still, reflecting the surrounding greenery.

Strategic Plan

3-Phase Approach

Phase 1: Stakeholder Feedback



Phase 2: Planning Sessions

Phase 3: Development & Rollout

Vision

To be the most visited, welcoming and inclusive travel destination in the world

Mission

Inspire, promote and grow global travel to Orlando for economic and community benefit



VisitOrlando®

Strategic Goals



Sales & Marketing

	Strategic Initiatives	Lead	Timeline		
			FY 2022	FY 2023	FY 2024
Targets <ul style="list-style-type: none"> Surpass 2019 results with driving total visitation to 80 million visitors Exceed pre-pandemic international numbers of 6.5 million visitors Maintain position as No. 1 meeting destination by CVENT 	(a) Enhance Orlando's top 10 global destination brand position in our key markets	Marketing & Communications			
	(b) Recover the domestic leisure travel volume	Marketing & Communications			
	(c) Expand reach in the international leisure markets	Trade Industry Sales			
	(d) Remain the No. 1 meetings destination	Meeting & Conventions			
	(e) Align sales efforts with key economic development priority segments	Meeting & Conventions			

Destination Management

	Strategic Initiatives	Lead	Timeline		
			FY 2022	FY 2023	FY 2024
Targets <ul style="list-style-type: none"> • Close the gap of workforce numbers to pre-pandemic levels of 460,000 • Achieve high ratings on a new customer experience survey • Reinstate and support the OCCC expansion • Protect the industry against hostile policies 	(a) Work with key partners to identify and address hospitality workforce issues to make Orlando a compelling destination to live, work and play	Executive Office			
	(b) Develop reputation-management program to measure and improve customer service in the region	Visitor Services			
	(c) Integrate emerging arts and culture scene into the visitor experience	Marketing & Communications			
	(d) Support the long-term sustainability of the Orange County Convention Center	Executive Office and Meetings & Conventions			
	(e) Support the improvement of transportation infrastructure	Executive Office			
	(f) Increase Visit Orlando's engagement with regional, state and national organizations to address policy issues	Corporate Communications & Community Relations			
	(g) Explore new demand generating events and activities	Marketing and Membership			

Destination Alignment

	Strategic Initiatives	Lead	Timeline		
			FY 2022	FY 2023	FY 2024
Targets <ul style="list-style-type: none"> Grow membership to 1,500 Receive 10 positive stories per year in local media Implement a DEI scorecard in the next 3 years Create a new program which showcases the unexpected Orlando experiences 	(a) Prioritize diversity, equity and inclusion in all programs and initiatives	Executive Office			
	(b) Increase community awareness and support for tourism	Communications			
	(c) Develop an additional program like Visit Orlando's Magical Dining that is mutually beneficial to the community, membership and Visit Orlando	Marketing and Member Relations			
	(d) Grow Visit Orlando's membership	Member Relations			
	(e) Expand partnerships with other organizations locally, regionally and nationally	Executive Office			
	(f) Improve the positive perception of Visit Orlando in the local media	Communications			

Sustainable Organization

	Strategic Initiatives	Lead	Timeline		
			FY 2022	FY 2023	FY 2024
Targets <ul style="list-style-type: none"> Surpass prior year TDT revenues Grow reserves to \$15 million representing 6 months of operating and limited program budget Become a top place to work in Central Florida Achieve positive all-team survey results Grow the organization's executive and management diversity Increase diversity in Board leadership 	(a) Protect and increase organization's financial resources	Finance			
	(b) Diversify funding sources	Finance			
	(c) Foster a positive organizational culture valued by all team members and stakeholders	Human Resources			
	(d) Expand Board and staff diversity	Executive Office			
	(e) Adapt to new virtual ways of doing business (e.g., travel shows, missions, work from home)	Information Technology			
	(f) Leverage technology to innovate and enhance all aspects of our business	Information Technology			
	(g) Grow, enhance and manage data in a privacy-compliant way to boost efficiency in reaching and engaging consumers	Information Technology			

TARGETS

By the end of 2024, we will achieve:

- 80 million visitors
- 40 million room nights generated

STRATEGIC GOALS



CORE VALUES

We

Innovate

Trust

Welcome

Serve

“Orlando”

VISION: To be the most visited, welcoming and inclusive travel destination in the world		MISSION: Inspire, promote, and grow global travel to Orlando for economic and community benefit	
2022-2024 STRATEGIC GOALS			
Sales & Marketing	Destination Management	Destination Alignment	Sustainable Organization
2022-2024 KEY INITIATIVES			
<div><div>a.</div>Enhance Orlando's top 10 global destination brand position in our key markets</div> <div><div>b.</div>Recover the domestic leisure travel volume</div> <div><div>c.</div>Expand reach in the international leisure markets</div> <div><div>d.</div>Remain the No. 1 meetings destination</div> <div><div>e.</div>Align sales efforts with key economic development priority segments</div>	<div><div>a.</div>Work with key partners to identify and address hospitality workforce issues to make Orlando a compelling destination to live, work and play</div> <div><div>b.</div>Develop reputation management program to measure and improve customer service in the region</div> <div><div>c.</div>Integrate emerging arts and culture scene into the visitor experience</div> <div><div>d.</div>Support the long-term sustainability of the Orange County Convention Center</div> <div><div>e.</div>Support the improvement of transportation infrastructure</div> <div><div>f.</div>Increase Visit Orlando’s engagement with regional, state and national organizations to address policy issues</div> <div><div>g.</div>Explore new demand generating events and activities</div> <td><div><div>a.</div>Prioritize diversity, equity and inclusion in all programs and initiatives</div><div><div>b.</div>Increase community awareness and support for tourism</div><div><div>c.</div>Develop an additional program like Visit Orlando’s Magical Dining that is mutually beneficial to the community, membership and Visit Orlando</div><div><div>d.</div>Grow Visit Orlando’s membership</div><div><div>e.</div>Expand partnerships with other organizations locally, regionally and nationally</div><div><div>f.</div>Improve the perception of Visit Orlando in the local media</div><td><div><div>a.</div>Protect and increase organization’s financial resources</div><div><div>b.</div>Diversify funding sources</div><div><div>c.</div>Foster a positive organizational culture valued by all team members and stakeholders</div><div><div>d.</div>Expand Board and staff diversity</div><div><div>e.</div>Adapt to new virtual ways of doing business (e.g., travel shows, missions, work from home)</div><div><div>f.</div>Leverage technology to innovate and enhance all aspects of our business</div><div><div>g.</div>Grow, enhance and manage data in a privacy-compliant way to boost efficiency in reaching and engaging consumers.</div></td></td>	<div><div>a.</div>Prioritize diversity, equity and inclusion in all programs and initiatives</div> <div><div>b.</div>Increase community awareness and support for tourism</div> <div><div>c.</div>Develop an additional program like Visit Orlando’s Magical Dining that is mutually beneficial to the community, membership and Visit Orlando</div> <div><div>d.</div>Grow Visit Orlando’s membership</div> <div><div>e.</div>Expand partnerships with other organizations locally, regionally and nationally</div> <div><div>f.</div>Improve the perception of Visit Orlando in the local media</div> <td><div><div>a.</div>Protect and increase organization’s financial resources</div><div><div>b.</div>Diversify funding sources</div><div><div>c.</div>Foster a positive organizational culture valued by all team members and stakeholders</div><div><div>d.</div>Expand Board and staff diversity</div><div><div>e.</div>Adapt to new virtual ways of doing business (e.g., travel shows, missions, work from home)</div><div><div>f.</div>Leverage technology to innovate and enhance all aspects of our business</div><div><div>g.</div>Grow, enhance and manage data in a privacy-compliant way to boost efficiency in reaching and engaging consumers.</div></td>	<div><div>a.</div>Protect and increase organization’s financial resources</div> <div><div>b.</div>Diversify funding sources</div> <div><div>c.</div>Foster a positive organizational culture valued by all team members and stakeholders</div> <div><div>d.</div>Expand Board and staff diversity</div> <div><div>e.</div>Adapt to new virtual ways of doing business (e.g., travel shows, missions, work from home)</div> <div><div>f.</div>Leverage technology to innovate and enhance all aspects of our business</div> <div><div>g.</div>Grow, enhance and manage data in a privacy-compliant way to boost efficiency in reaching and engaging consumers.</div>
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ORLANDO
ECONOMIC
PARTNERSHIP

+

VisitOrlando

Destination Co-branding

Visit Orlando[®]
magical dining[®]
August 27 - October 17

3 COURSES
\$37



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IDD *ignity*



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