



Visit Orlando®

State of the Industry | International Travel | Marketing | Conventions | DEI Roadmap

Q4 TOURIST DEVELOPMENT COUNCIL: DEC. 3, 2021



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State of the Industry

Consumer Sentiment

Americans feeling safer and more enthusiastic about traveling

- Excitement for travel in next 12 months hit 76% (+11 pct. pts from early Oct.)
- Confidence in safe travel is near pandemic-high levels seen in June

Holiday travel should improve substantially over last year

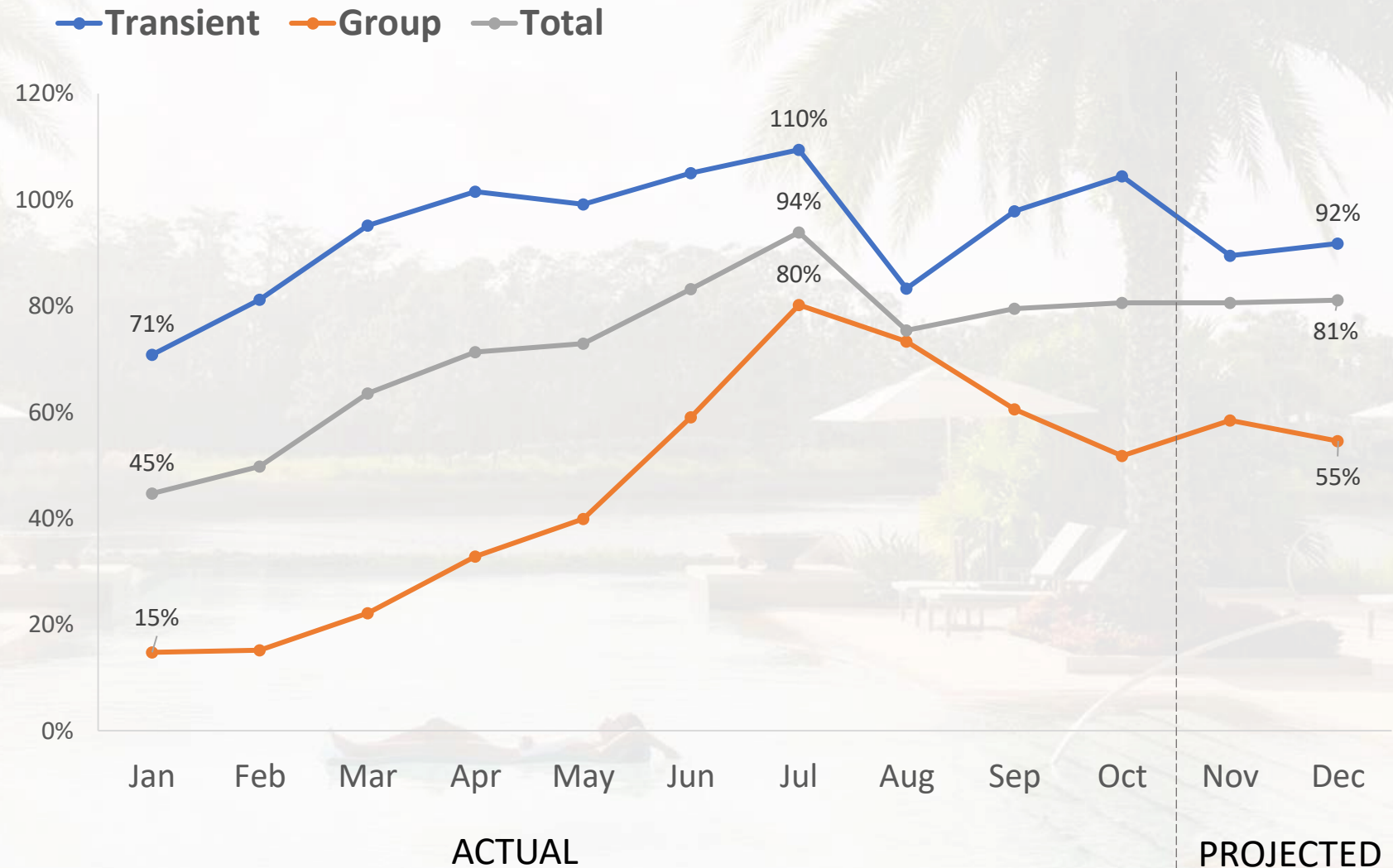
- 45% have holiday trip at least tentatively planned (up from 28% in Oct.)

Sources: Longwoods International, Destination Analysts



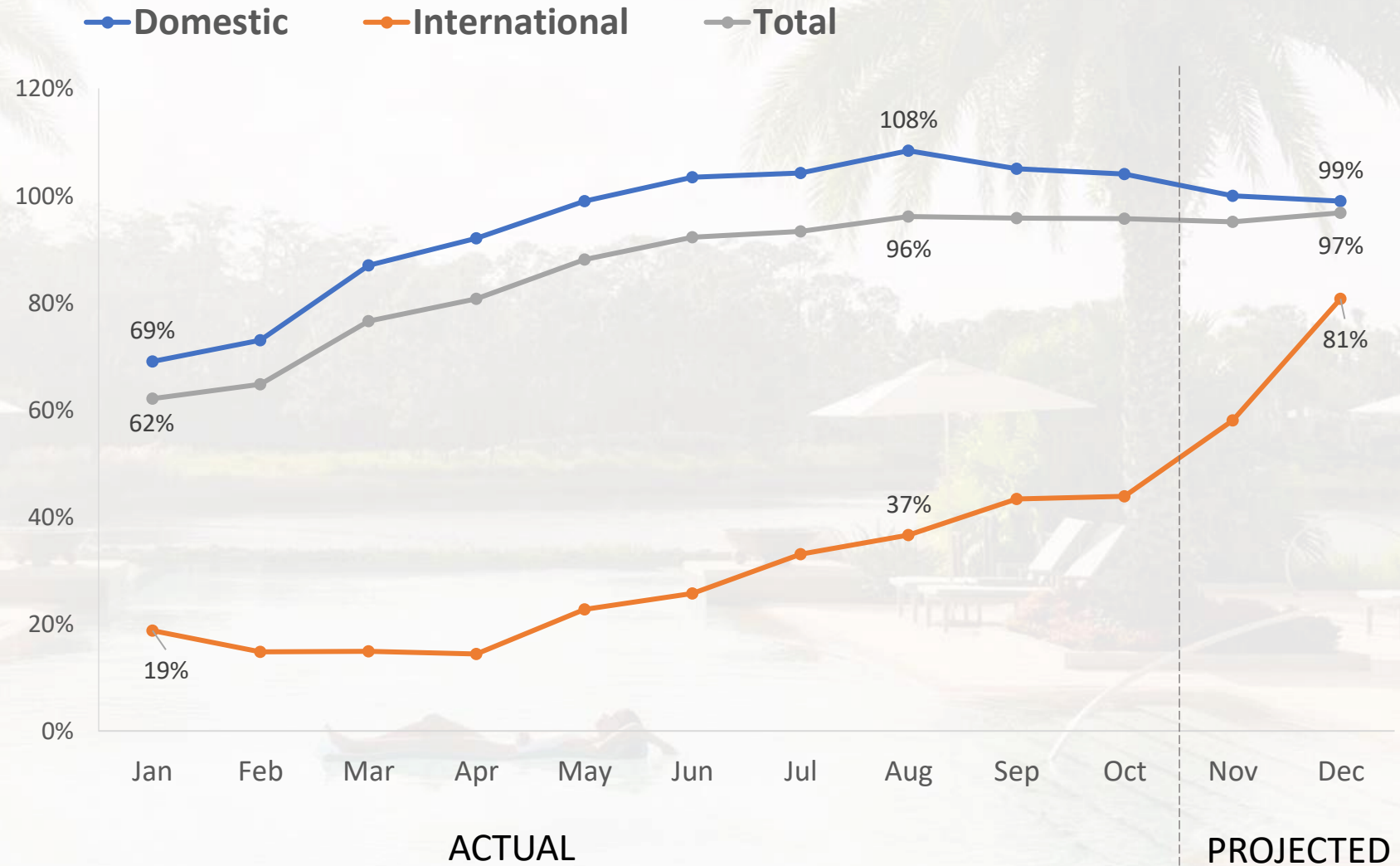
Hotel Recovery

Metro Orlando demand, as a percentage of 2019



Air Travel Recovery

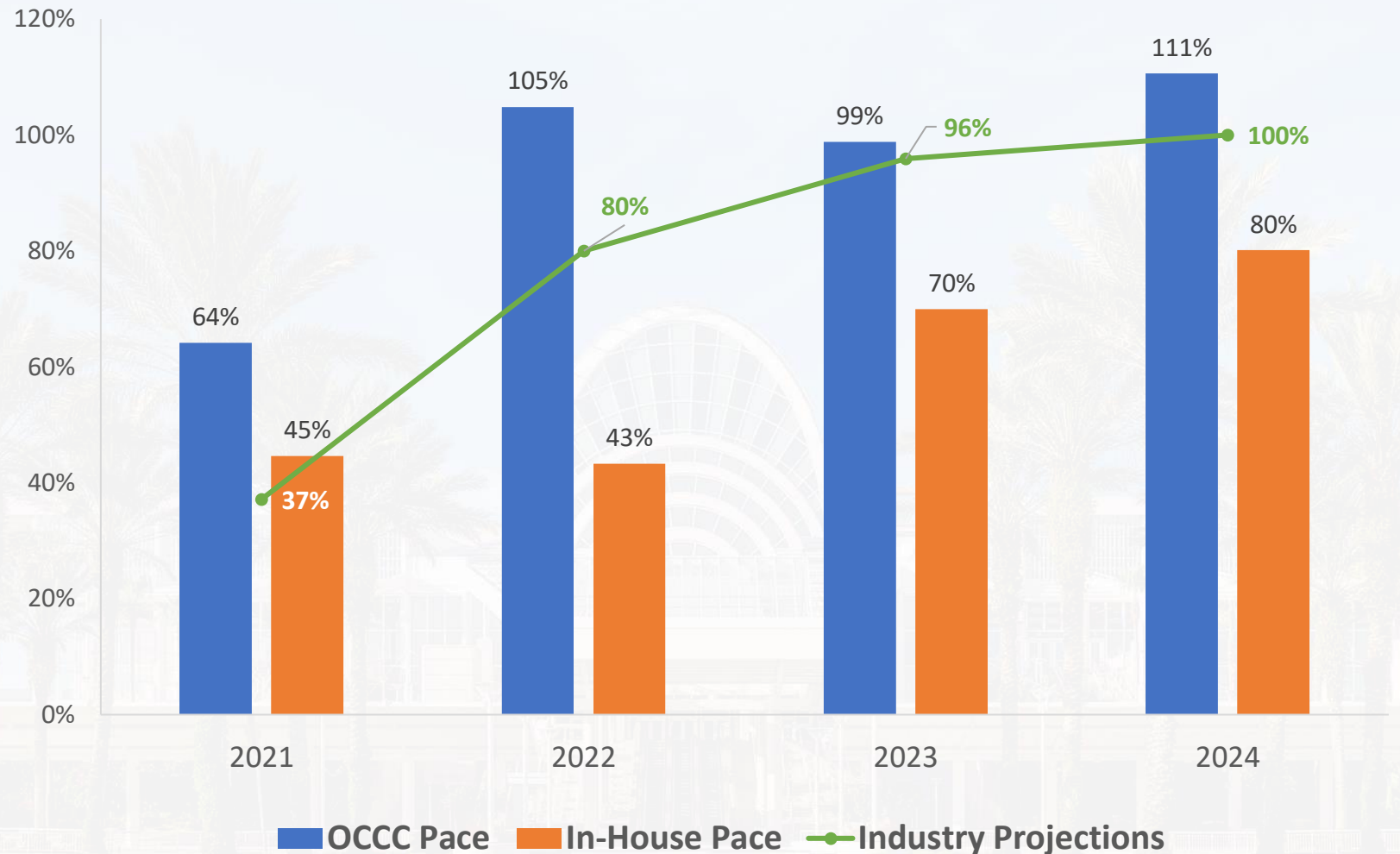
MCO and SFB seat capacity, as a percentage of 2019





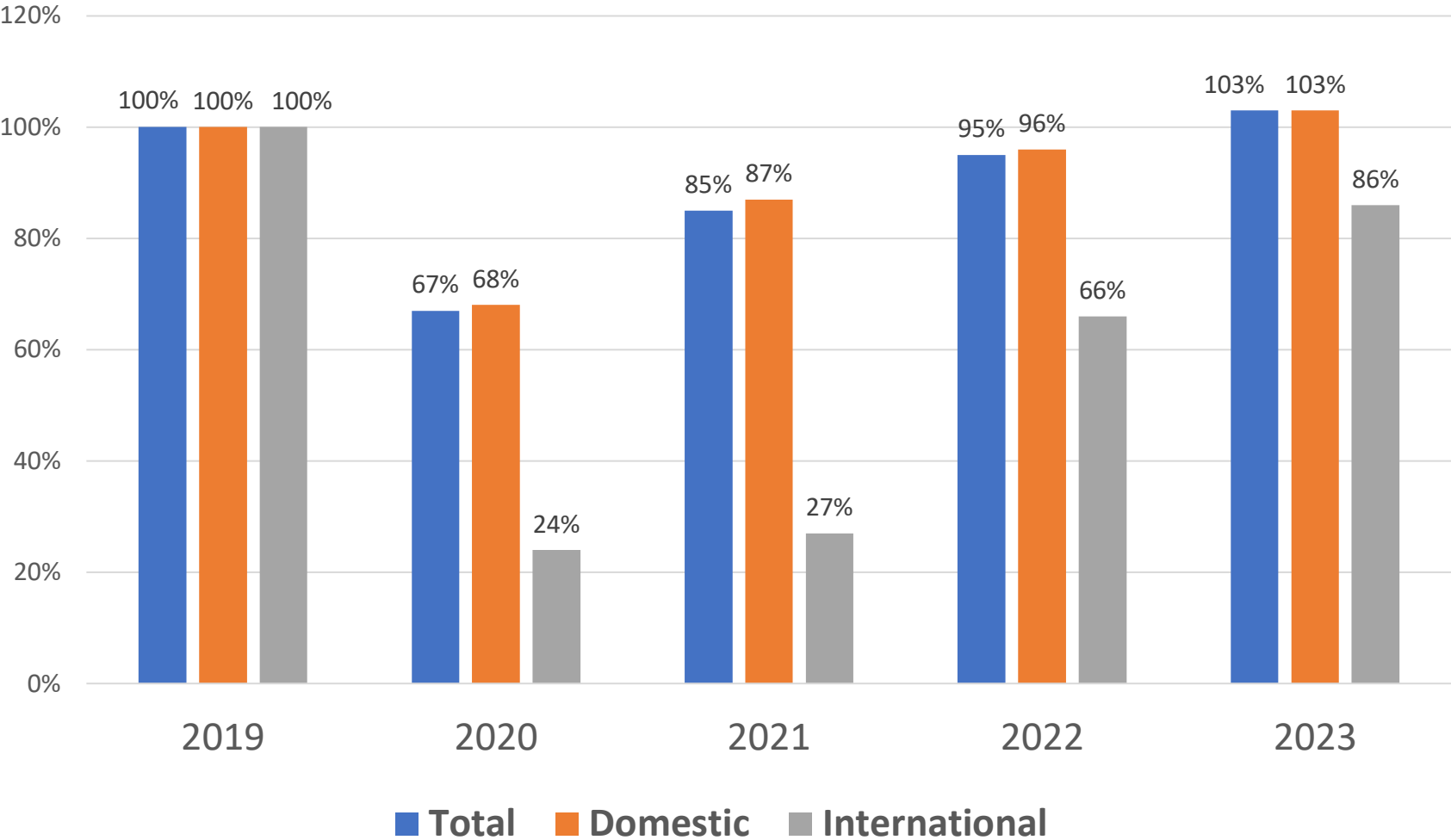
Conventions Recovery

Projected attendance, as a percentage of 2017-2019 levels



U.S. Travel Forecast

National visitation as a percentage of 2019 levels



2021: Extended border closures restricted international recovery

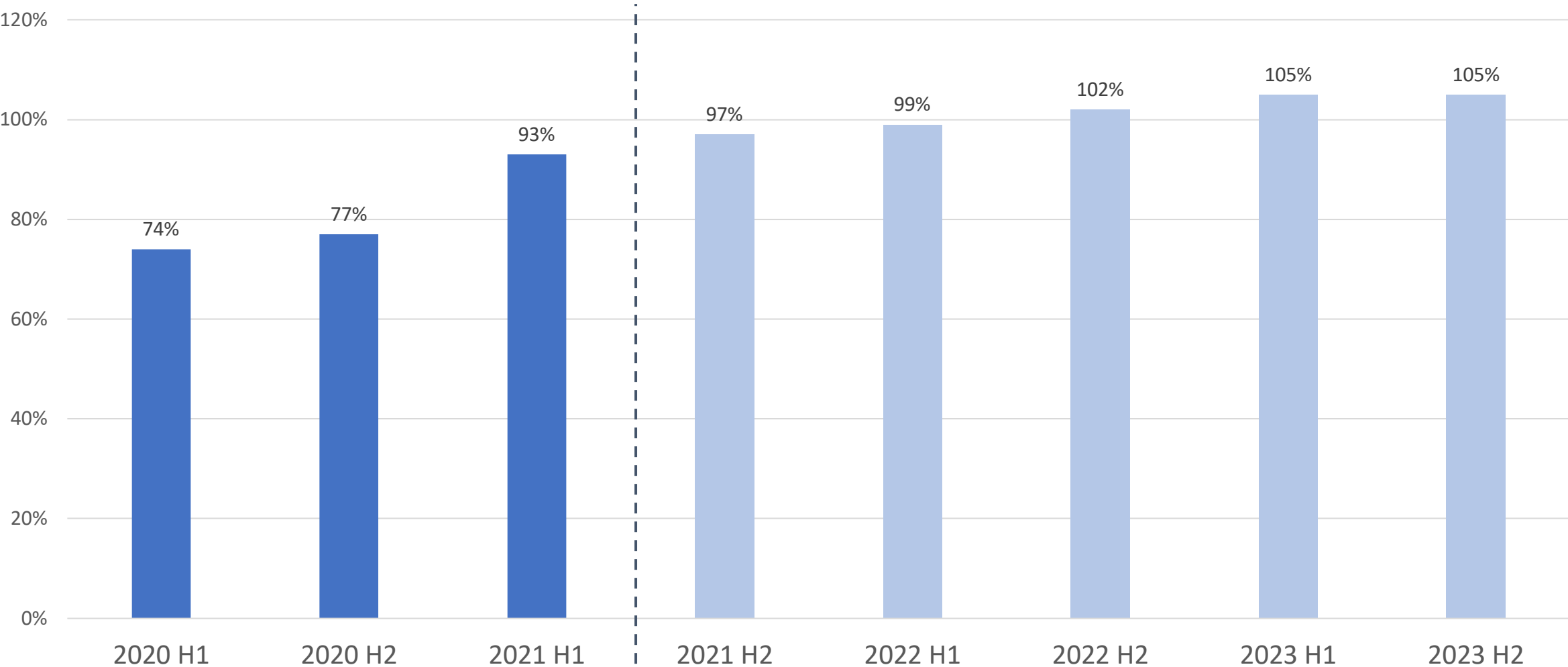
2022: International recovery gains momentum

2023: Domestic travel lifts overall travel to pre-pandemic levels

2024: International travel back to pre-pandemic levels

U.S. Travel Forecast

Domestic leisure leads recovery, reaching pre-pandemic levels in second half of 2022



USA

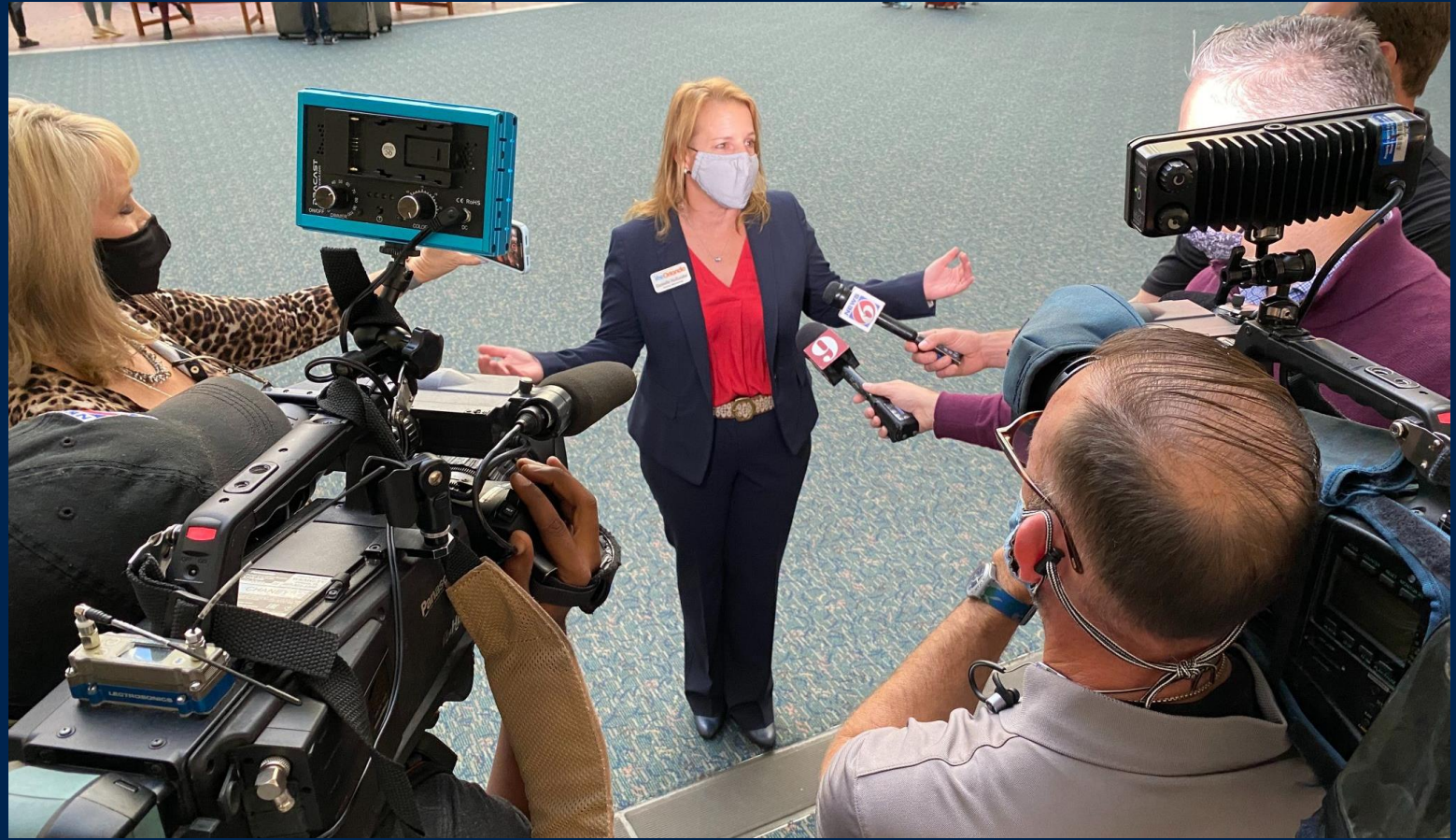
VisitTheUSA.com

Brand USA

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International Travel

Welcoming the Return of Global Travel



Recovery Forecast by Orlando's Top Markets



United Kingdom

Expected to lead the recovery



Canada

Hesitancy toward international travel remains



Brazil

Likely the slowest market to recover



Mexico

Recovering quickly; very open to global travel



Return of International Flights

Virgin Atlantic	London (H/M)	Nov. 8
British Airways	London (H)	Nov. 15
Aer Lingus	Dublin	Nov. 27
Azul	Brazil	Dec. 1
LATAM Airlines	Brazil	Dec. 1
Aer Lingus	London (M)	Dec. 11
GOL	Brazil	TBD



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Marketing

The **WONDER** *Remains*



Discovery Cove®

Campaign Extension in Core Markets





WALT DISNEY World 50

Visit Orlando
ORLANDO'S MOST MAGICAL
GATHERING CONTEST

Magical Gathering Prize Provided by

Disney
MEETINGS & Events



THE MICHELIN GUIDE





Tripadvisor & Amazon Alexa Partnership

Positive Outlook for 2022

Next year's group pace is
5% above pre-pandemic levels

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Conventions

Recent Industry Awards



VisitOrlando.[®]
IMEX AMERICA 2021



Upcoming Sales Efforts

Live Industry Shows



Dec. 7-9
Philadelphia



Dec. 14-17
Atlantic City



Dec. 14
Chicago

Sales Missions

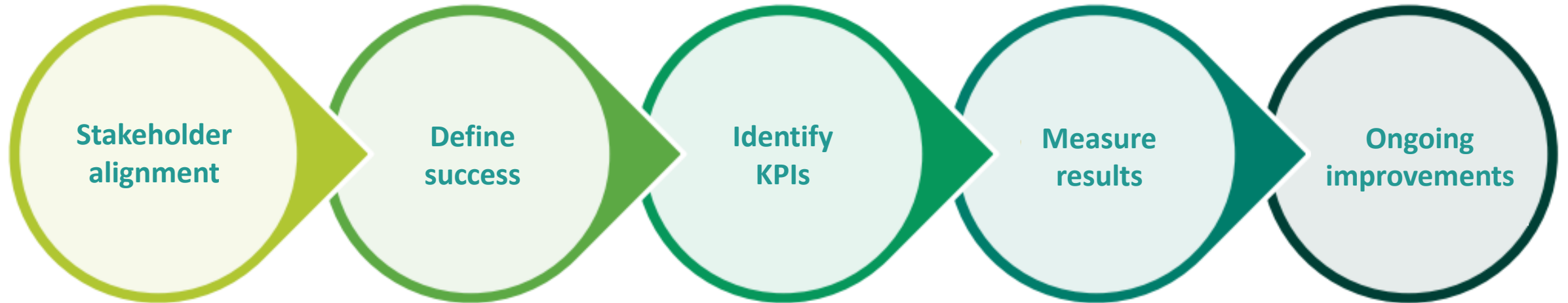
Dec. 1-2
**New Jersey &
Pennsylvania**

Dec. 8
**Florida
(Tallahassee)**



Citywide Sales Strategy

Align, engage and collaborate with OCCC, hotels and other key stakeholders



New Conventions Coming to Orlando

Group	Year(s)	Attendees	Rooms	Economic Impact
International Association of Fire Chiefs	2025, 2028	21,000	12,000	\$53.9 million
AME Church Women Missionary Society Quadrennial	2023	6,100	11,690	\$15.7 million
Catersource	2023	5,500	8,470	\$14.2 million
Southern Association of Colleges and Schools	2027	4,600	10,117	\$11.8 million
International Church of the Foursquare Gospel	2022	4,100	6,573	\$10.5 million
Adventist-Laymen's Services & Industries	2024, 2025	4,000	1,655	\$10.3 million
New U Life	2022	1,750	1,825	\$4.5 million
Collegiate Strength and Conditioning Coaches Assoc.	2023	1,136	1,900	\$4.4 million
National Private Truck Council	2024	1,270	495	\$3.3 million
Kampgrounds of America	2022	1,150	1,132	\$3.0 million
National Association of RV Parks and Campgrounds	2022	914	1,110	\$2.3 million



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DEI Roadmap

Diversity Committee

- Sheryl Taylor, Chair
- Gabe Itajahy, Co-Chair
- Richard Snowten
- Paula Ramirez
- Caja Kelly
- Collette Johnson
- Cory O'Born
- Natalia Ramirez
- Rob Humphreys
- Michelle Rivera-Correa
- Ishma Haider





PURPOSE: Prioritize diversity, equity and inclusion in all initiatives.



DEFINITION: Create meaningful, equitable and systematic change to foster an inclusive and welcoming environment for all, regardless of race, age, gender, disability or sexual orientation.



SUCCESS: Develop a measurement scorecard with goals for each pillar.

Visit Orlando



Pledge Pillars

PEOPLE

We will build and sustain equitable, diverse, and inclusive Visit Orlando board of directors, executive management team and workforce

BEST PRACTICES

We will share best practices and develop tangible ways for growing and measuring progress in equity diversity and inclusion, industrywide

PROMOTION

We will share the experiences of and in underrepresented communities that are unseen in tourism marketing and storytelling

ADVOCACY

We will support actions in our organization, industry and community that seek to achieve equity and justice for everyone

SUCCESS METRICS

We will set goals, collect data and examine change over time to ensure success

Sales & Marketing

- Enhance Orlando's top 10 global destination brand position
- Recover domestic leisure travel volume to 95% of 2019 levels
- Expand reach in core international leisure markets
- Remain the No. 1 meetings destination

Membership, Partnership & Community

- Grow Visit Orlando's membership by 20%
- Align with industry partners on key legislative issues
- Assist with solutions on key community initiatives
- Increase community awareness and support for travel industry
- Improve perception of Visit Orlando in the local media

Finance & Administration

- Protect and increase organization's financial resources
- Constantly manage internal controls to prevent financial risk
- Foster a positive organizational culture valued by all
- Expand board and staff diversity
- Leverage technology to support new ways of doing business
- Grow, enhance and manage data in a privacy-compliant way



Visit Orlando

YEAR-END
CELEBRATION

LUNCHEON

IN COLLABORATION WITH

WALT DISNEY WORLD 50

12.10.21

**DISNEY'S CORONADO
SPRINGS RESORT**