



VisitOrlando®

# ANNUAL UPDATE

*Orange County Board of County Commissioners*  
*May 2, 2023*

Discussion Agenda A.1 Exhibit 1 -  
Casandra Matej



# ORANGE COUNTY RESIDENT SURVEY

## STRENGTHS

- Majority believe tourism is the most important industry for Orlando's success
- Agree tourism enhances Orlando area residents' quality of life
- Appreciate tourists for their contribution to the local economy

## OPPORTUNITIES

- Education on use of TDT funds
- Awareness of Visit Orlando's Magical Dining
- Showcase span of opportunities within the tourism industry

# ANNUAL TOURISM



Supports

**392,000 JOBS**

(31% of the workforce)



Generates

**\$67.1 BILLION**

in economic impact



Pays

**\$21.4 BILLION**

compensation



Provides

**\$5.3 BILLION**

in local and state tax revenue

***TAXES FROM TOURISM HELP PAY FOR PROGRAMS IMPORTANT TO ALL FLORIDIANS:***



**ARTS & CULTURE**



**EDUCATION**



**INFRASTRUCTURE**



**PUBLIC SAFETY**

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# THE IMPACT OF TRAVEL



*When people visit, our entire community benefits.*

*Each visitor provides*

**\$1,000**

*in economic impact*

*Tourism saves each household*

**\$6,412**

*in annual taxes*





## 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.



### CORE Values



We  
INNOVATE



We  
TRUST



We  
WELCOME



We  
SERVE



We  
"ORLANDO"

# VISIT ORLANDO TEAM

TOTAL **154**  
TEAM MEMBERS

**4** OCCC  
**6** REGIONAL

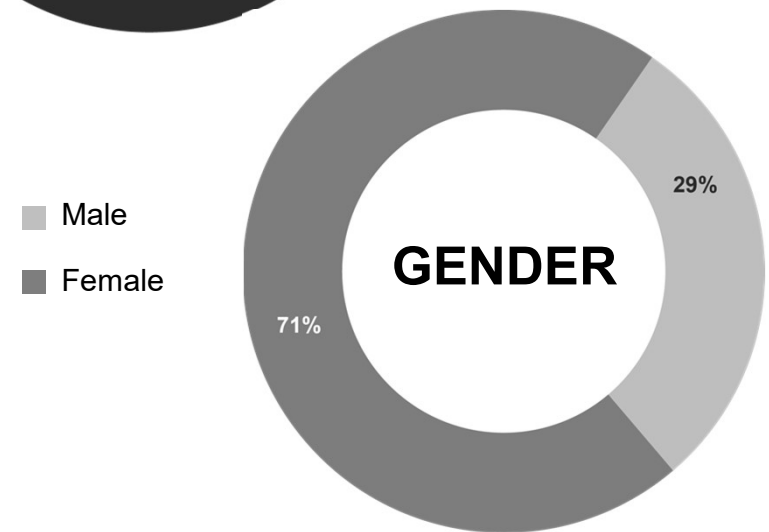
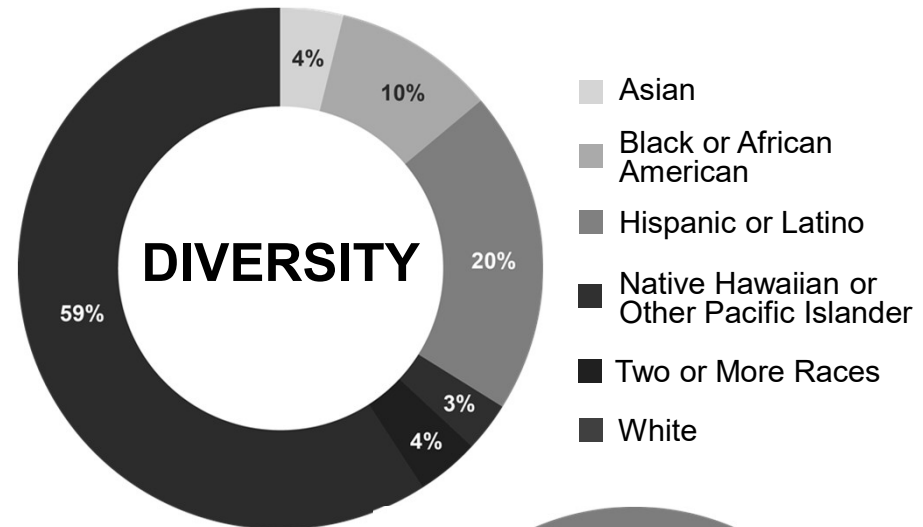
## EXTENSIVE EXPERTISE

- MBA
- CMP
- JD
- APR
- CAE
- CDME

## LANGUAGES SPOKEN

- Spanish
- French
- German
- Portuguese
- Russian
- Italian
- Gujarati
- Tagalog

**45%** 2022 NEW HIRE DIVERSITY RATE



# MEMBERSHIP BY INDUSTRY

**33%**

Attractions

**25%**

Dining

**16%**

Accommodations

**9%**

Visitor & Professional Services

**8%**

Convention Services

**7%**

Retail

**2%**

Transportation

**1,000+  
SMALL  
BUSINESSES**



# MEETINGS & CONVENTIONS



# DOMESTIC



# INTERNATIONAL



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# MEETINGS & CONVENTIONS SALES CYCLE



**STAGE 1:**  
Create Awareness



**STAGE 2:**  
Uncover Opportunities



**STAGE 3:**  
Prove Orlando



**STAGE 4:**  
Close Sale



**STAGE 5:**  
Support Pre-planning



**STAGE 6:**  
Execute Event



**STAGE 7:**  
Follow Up

# MIX OF BUSINESS

## Association



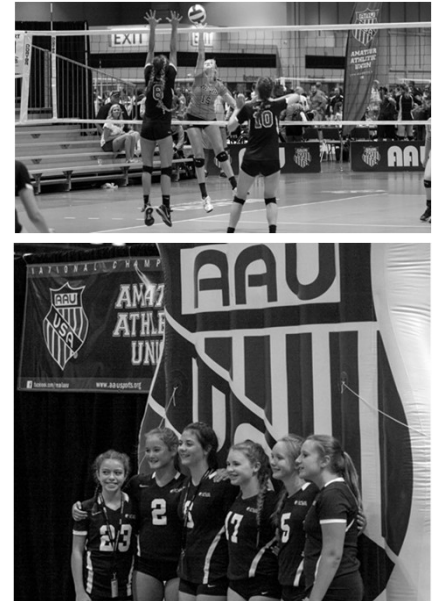
## Corporate



## Specialty



## Events





## 2022 Production of Visit Orlando's Convention Sales Team

**1,072**

events booked

**1.4M**

est. attendees

**2.5M**

room nights

**\$3.1B+**

economic impact

*\* Represents citywide & in-house events booked for 2022 & beyond. (as of 12/31/22.)*



# STRONG START TO 2023



**42,095**

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**PGA**  
MERCHANDISE SHOW

**30,000**

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**27,575**

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**22,500**

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**17,505**

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# 2023 M&C COMPETITIVE SET

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Las Vegas

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Chicago

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Dallas

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Nashville

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Atlanta

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Washington, DC

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Phoenix

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Miami





## **TOP REASONS WE LOSE BUSINESS**

- Organization prefers alternate location
- Unavailable dates at OCCC
- Unavailable housing package
- Organization postpone/reevaluate
- Political Climate

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**“NEVER BEEN DONE”  
GETS DONE EVERY DAY.**

UNBELIEVABLY REAL



This is the place where collaboration fuels innovation. Orlando isn't just home to big entertainment—we're home to big ideas, too. Our groundbreaking business community prides itself on pushing the limits of what's possible, and we welcome meetings and groups to join us in that pursuit.

**ORLANDOMEETING.COM**

## **TOP 5 REASONS WE WIN BUSINESS**

- Consistently ranked No. 1 destination by CVENT
- Strong reputation for hospitality & service
- Diverse & unique meeting location offerings
- Destination amenities
- Ease of access to destination

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# LEISURE MARKETING

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# 2022 UNBELIEVABLY REAL CAMPAIGN RESULTS

VisitOrlando.com

ANYTHING IS  
POSSIBLE IF YOU  
CAN IMAGINE IT.

UNBELIEVABLY REAL

**54%** CAMPAIGN  
RECALL

**\$8.1B** DIRECT VISITOR  
SPENDING



US



UK/IRELAND



CANADA



BRAZIL



MEXICO



COLOMBIA



CHILE



PERU

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## SIGNIFICANT IMPACT

- A place **worth paying** for
- A place **welcoming** to all
- A place to **getaway** and **unwind**
- A place that has **new things** to see and do
- **Good place** for adults
- A place one **must see** once in a lifetime



# TOP OF MIND AWARENESS: FAMILY

	Brazil	Canada	Colombia	Mexico	USA	UK	Ireland	Peru	Chile
Orlando's Share	10.3%	1.4%	7.0%	7.9%	1.9%	1.64%	1.35%	1.6%	2.1%
Orlando's Ranking	1	18↓	3	2↑	9	16↓	16↓	15	16

# LEISURE COMPETITIVE SET

## DOMESTIC

- New York City
- Las Vegas
- Miami/Ft. Lauderdale
- California
- Tampa/St. Pete
- Mexico
- Caribbean
- Europe - London/  
Paris/Rome

## CANADA

- New York
- Las Vegas
- Miami/Ft. Lauderdale
- Mexico
- Cuba
- Caribbean
- Japan
- Europe –  
Italy/France/Greece

## UK & IRELAND

- New York City
- Miami/Ft. Lauderdale
- Los Angeles/  
California
- Spain
- Portugal
- Greece
- Italy
- Dubai

## LATAM (Mexico, Brazil, Colombia)

- New York City
- Las Vegas
- Miami/Ft. Lauderdale
- Los Angeles/  
California
- Europe – Portugal,  
Spain, Italy, France
- Caribbean
- Canada
- In-country  
Destinations

# MULTI CULTURAL CAMPAIGNS

US Hispanic



African  
American



LGBTQ+



Asian American  
Pacific Islander

**HUFFPOST**

**BuzzFeed**



**PASSPORT**  
TRAVEL • CULTURE • STYLE • ADVENTURE • ROMANCE!

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# ORLANDO 2022 YEAR END



MCO  
Passengers

**99%**



Hotel  
Demand

**99%**



Average  
Daily Rate

**114%**



Citywide  
Attendance

**99%**



Leisure & Hospitality  
Employment

**99%**



# 2023 OUTLOOK



- Slight growth in hotel demand
- Mild economic slowdown in late 2023



- Domestic remains king
- International visitation strong from key markets
- Competition is intense



- Business travel continues to rebound
- Group segment leading



**HEADWINDS**

**VISA WAIVER**  
**POLITICAL CLIMATE**  
**INTENSE COMPETITION**  
**TRAVEL PRICES**

# COMMUNITY INITIATIVES

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# THE ABLE TRUST



Embrace - Expand - Empower



**HOPE**  
Community Center  
Building Community. Enriching Lives.



Helping Women to Help Themselves



ORANGE



Empowering Communities. Changing Lives.



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## **MAY 8**

THANK YOU TO LAW ENFORCEMENT, CUSTOMS & BORDER PATROL, TSA

## **MAY 9**

JOINT CHAMBER BREAKFAST

## **MAY 10**

VISIT ORLANDO & OCCC SECOND HARVEST VOLUNTEER EVENT

## **MAY 11**

VISIT ORLANDO'S CELEBRATING TRAVEL & TOURISM LUNCHEON

## **MAY 12**

VISIT ORLANDO STAFF APPRECIATION EVENT



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