Public Hearing
Board of County Commissioners

Amending Article IV of Chapter 25 of the Orange County Code Section 25-140 Tourist Development Plan

October 16, 2018

TDT Plan Amendment Overview

- Background
- Ordinance Summary
- Visit Orlando Presentation
- Florida Citrus Sports Presentation
- Public Comment
- Requested Action

TDT Plan Amendment Background

July 2018 - Mayor Jacobs & CFHLA proposals for TDT investments including additional marketing funds for Visit Orlando & Camping World Stadium

Sept.2018 - TDC unanimously recommends both amendments to TDT Plan

TDT Plan Amendment Ordinance

- Visit Orlando - 1 Yr. Extension of existing $5M "Additional Advertising Funds" & additional $5M
- Camping World Stadium – up to $60M for additional improvements
- History Center – no increase - but ability to use TDT for capital and to carryover

VisitOrlando®

Core International Markets

Brazil

Canada

UK

Colombia

Mexico

Brazil

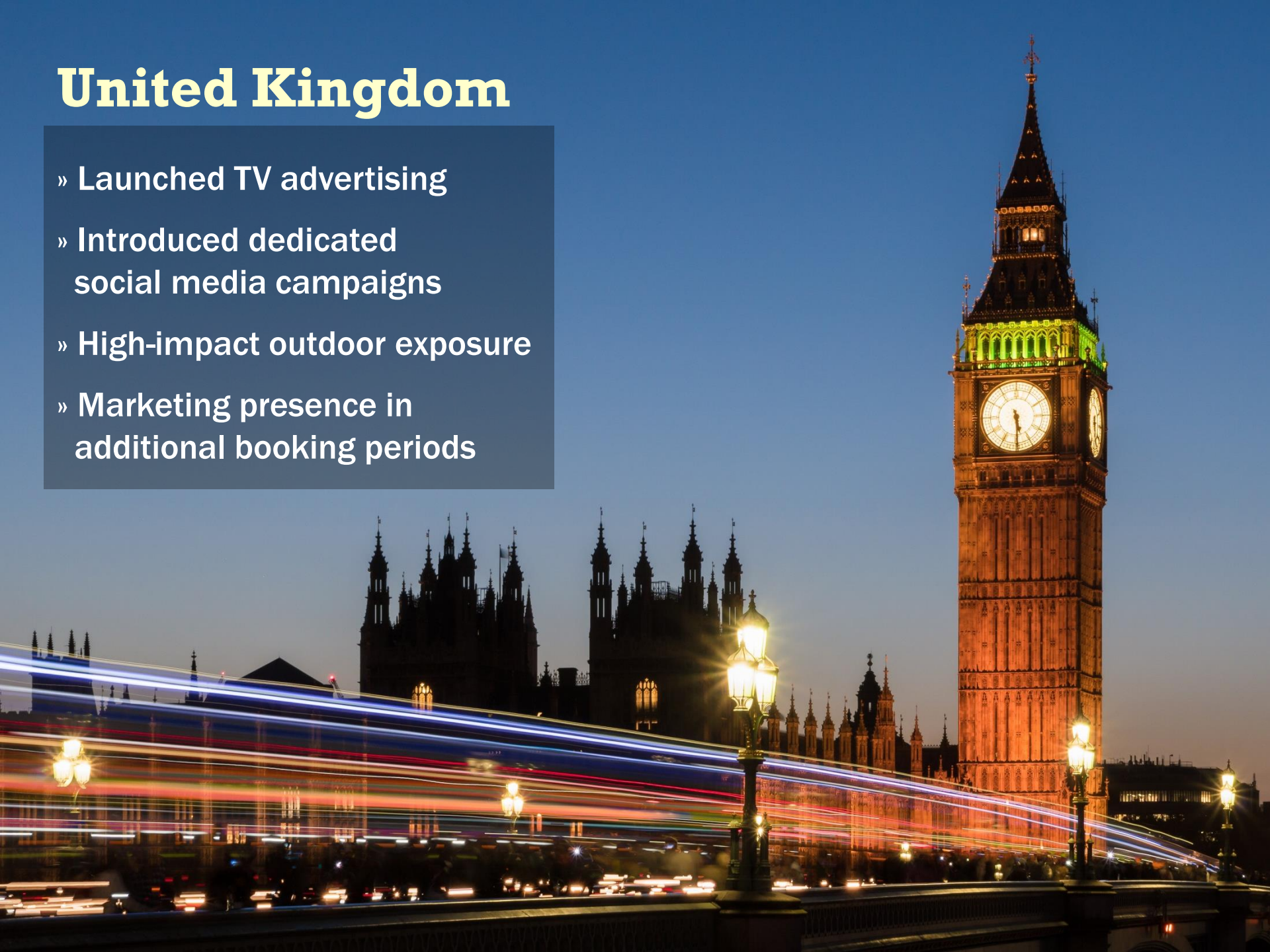
- » Expanded TV presence nationally
- » Significantly increased digital efforts
- » Introduced dedicated social media campaigns

Canada

- » Expanded geographic footprint
- » High-impact outdoor exposure
- » Introduced dedicated social media campaigns
- » Marketing presence in additional booking period

United Kingdom

- » Launched TV advertising
- » Introduced dedicated social media campaigns
- » High-impact outdoor exposure
- » Marketing presence in additional booking periods



International
Tour Operators & Airlines

VIAGENS CVC

LATAM TRAVEL

Virgin HOLIDAYS

WESTJET vacations

TravelBrands

FLYTOUR VIAGENS E TURISMO

BRITISH AIRWAYS

norwegian

AIR CANADA VACATIONS

AEROMEXICO SKYTEAM

Thomas Cook

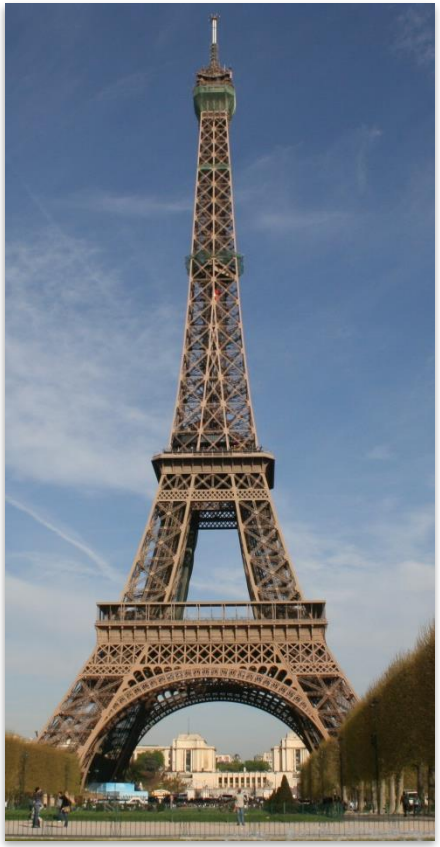
Global Headwinds Since 2013

Marketing Orlando through times of international uncertainty

- Exchange rate
- Brexit
- Volatile Brazilian economy and politics
- Canadian perceptions of U.S. politics
- Travel ban
- Safety concerns (Pulse, Zika, hurricanes)

Importance of Renewed & Additional Funding

Combat Increased Marketing from Competitive Destinations



Mitigate International Uncertainties

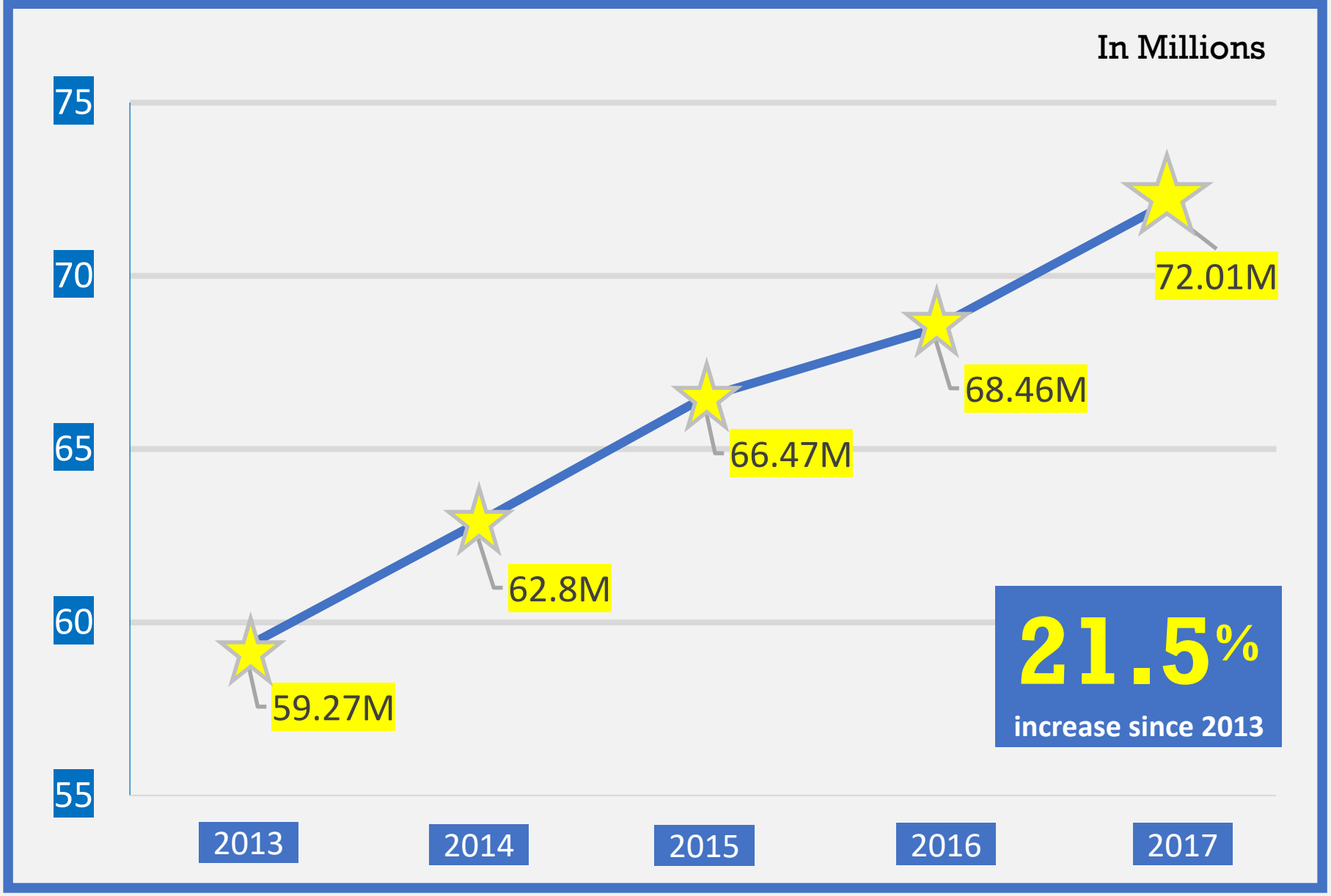
Expand Frequency & Reach in U.S.

Increased Room Inventory

Ensure Leading Position in Convention Industry

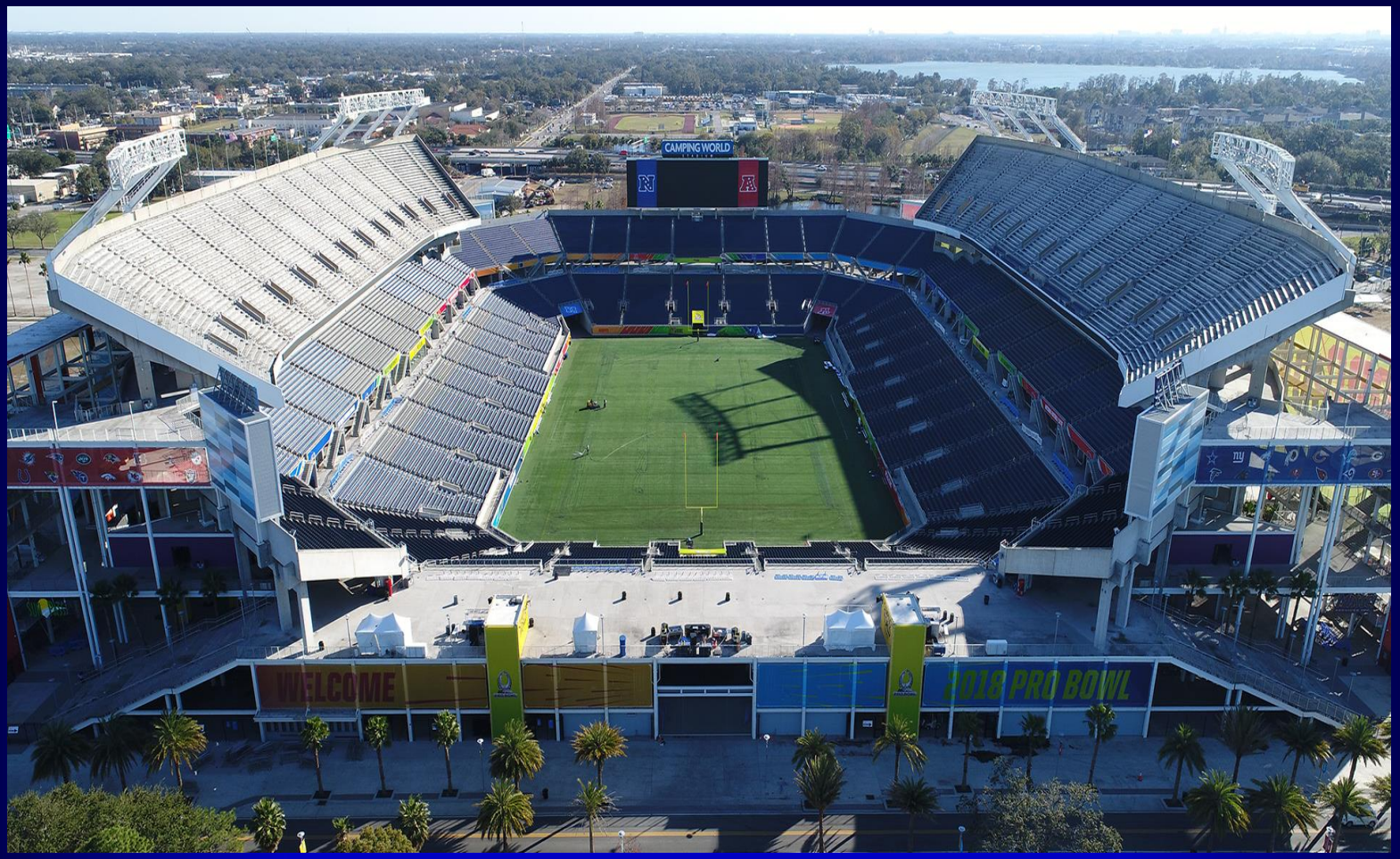
VisitOrlando

Record Visitation



VisitOrlando

Camping World Stadium

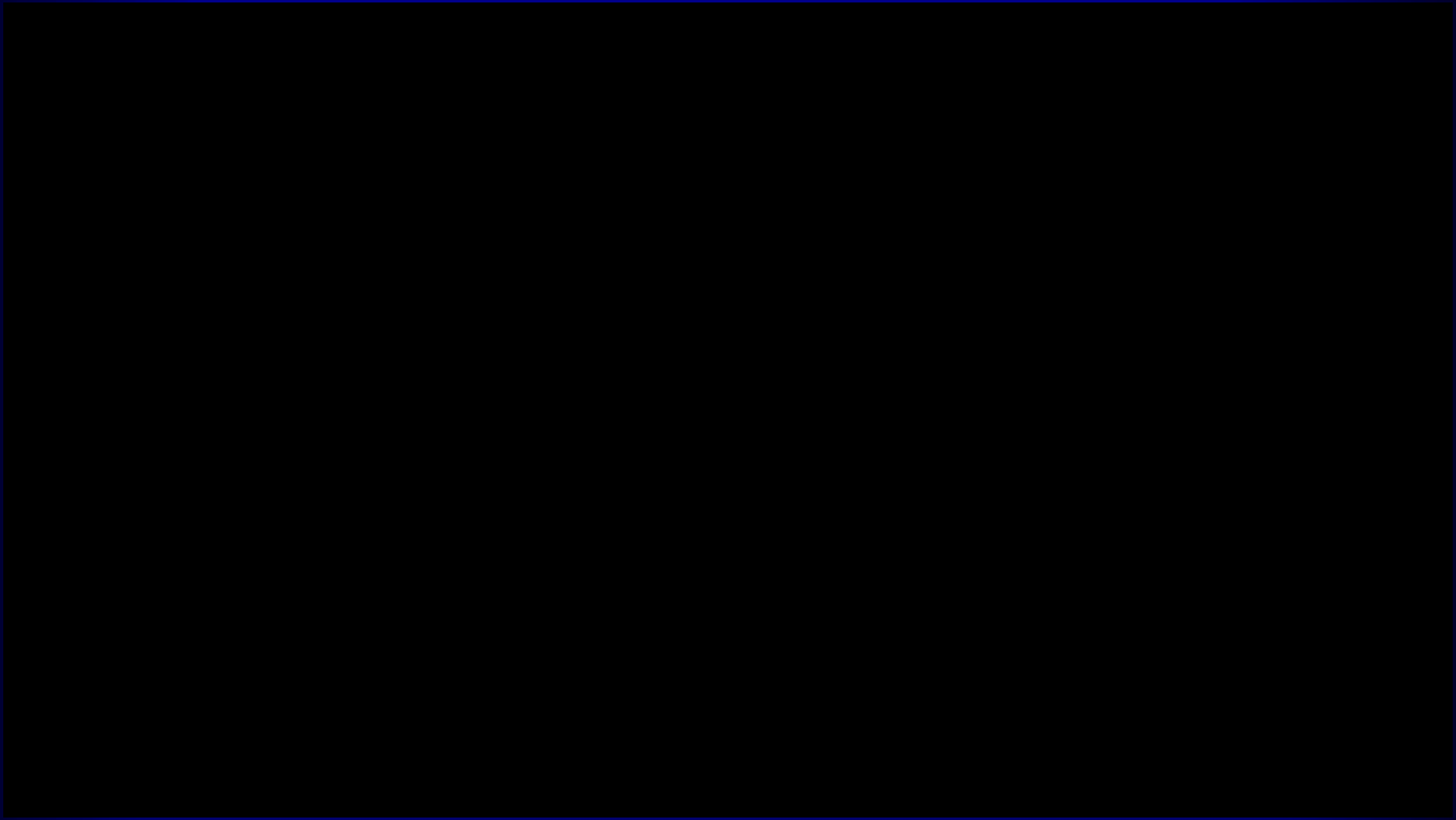

CAMPING WORLD
WELCOME
2018 PRO BOWL

TIMELINE

- 1989: Current Terrace Level “upper decks” are constructed
- 2006: Florida Citrus Sports proposes options for $195-$252 million stadium reconstruction project
- 2006: Leaders agree to $1.1 billion Community Venues deal budgeting $175 million for stadium reconstruction
- 2007: $1.1 billion Community Venues deal approved
- 2012: After recession delays project indefinitely, Orange County and City of Orlando agree on deal to advance stadium reconstruction including funding to address cost escalation
- 2013: Reconstruction plan approved with additional competitive elements
- 2014: Stadium opens for first event

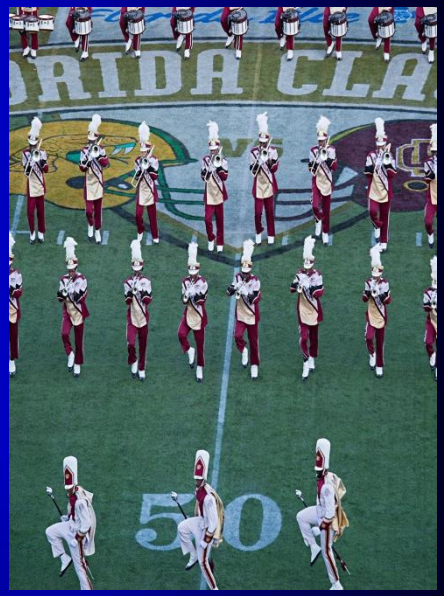
CAMPING WORLD STADIUM

Camping World Stadium (Video)



Click Arrow to Start Video

A Winning Investment



Orlando's Sports/Event Tourism Economy

- College Football events (Three Bowl games, Florida Classic, Kickoff games, Spring Games, ACC Championship)
- NFL events (3 Pro Bowls, Dolphins preseason)
- International soccer events (Mexico vs. Costa Rica, Copa America, International Champions Cup)
- Major concerts (Rolling Stones, Guns N' Roses, Metallica, Eagles/Buffet, Beyoncé/Jay-Z, Electric Daisy Carnival)
- Special events (Wrestlemania, Drum Corps International, Monster Jam World Finals)

CAMPING WORLD STADIUM

Annual Impact

Economic Impact	Estimated (2007 EDC Study – Community Venues)
Direct Spending	$130,201,000
Total Output	$226,423,000
Earnings	$88,053,000

Media Impact

Earned Media

Medium	# of Articles	Avg. Circulation	Impressions	Media Value
Social	7,490	285	2,134,650	$19,746
Television	8,191	53,705	439,897,655	$4,069,053
News	35,472	42,510	1,082,814,720	$10,016,035
TOTAL			**1,524,847,025**	**$14,104,035**

Orlando was mentioned 41,153 times during the past 12 months (August '17 – July '18) in coverage associated with Camping World Stadium. Only 15% of impressions were from news outlets across Florida.

•Source: 2018 CS&L Study

Media Impact

Total Impact

Orlando receives over 2,000,000,000 impressions annually and over $23,500,000 in media value through the association with Camping World Stadium and the events it hosts.

Category	Impressions	Media Value
Earned Media	1,524,847,025	$14,104,833
Paid Media	29,932,898	$682,200
Broadcast	524,412,267	$8,727,887
TOTAL	**2,079,192,190**	**$23,514,920**

•Source: 2018 CS&L Study

“Finish the Job”

National Venue Trends

Atlanta
Mercedes-Benz Stadium
$1.6 billion

Los Angeles
LA Stadium at Hollywood Park
$4.96 billion

Las Vegas
Raiders Stadium
$1.8 billion

Southeast Region Venue Trends

Additional Investment Since 2013

Tampa
Raymond James Stadium
$160 million
in upgrades

Jacksonville
TIAA Bank Stadium
$153 million
in upgrades

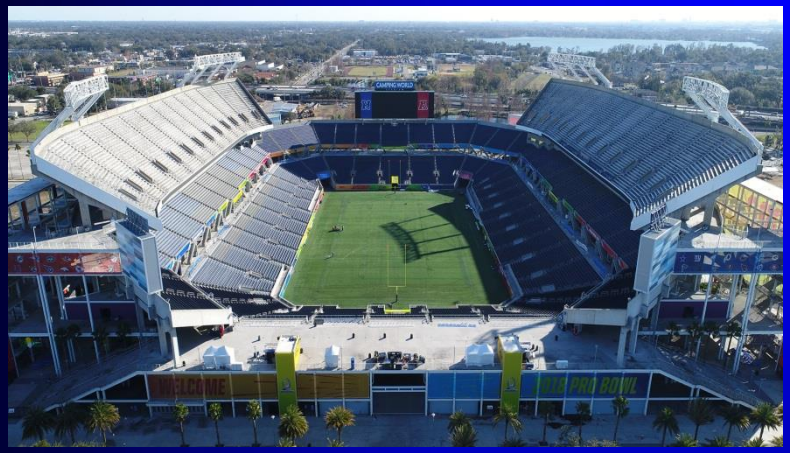
Miami
Hard Rock Stadium
$500 million
in upgrades

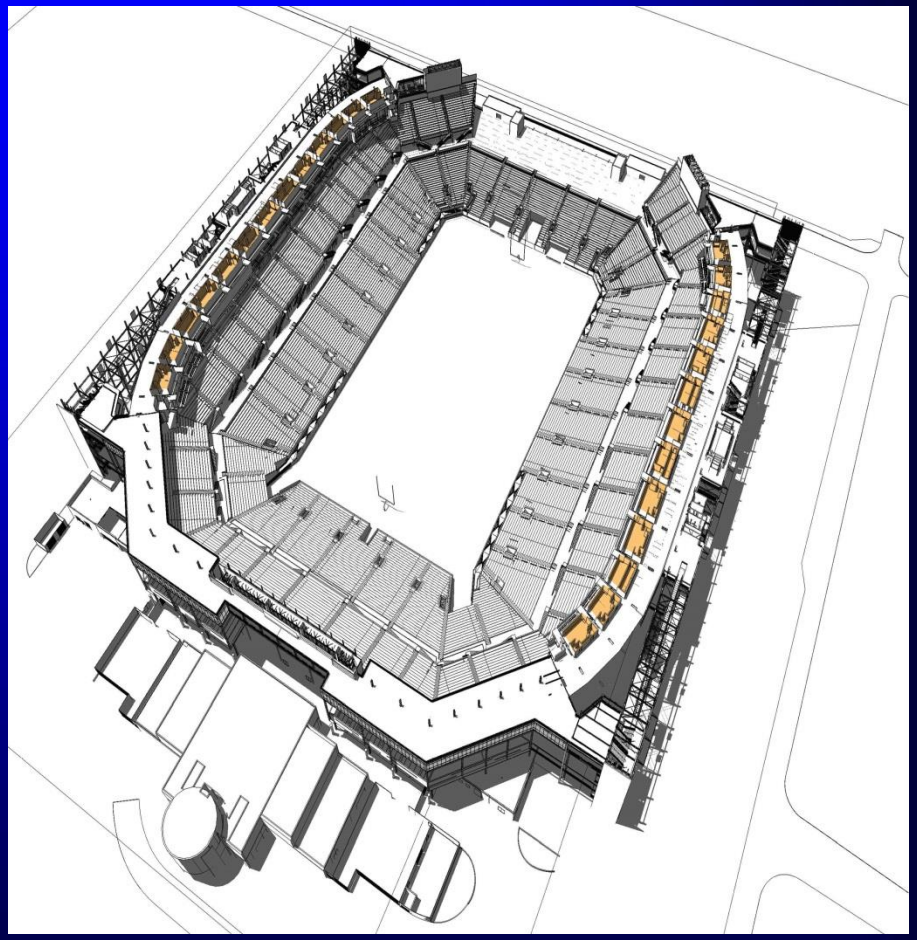
“Scope of Work”

Parking, Wayfinding, Pedestrian Improvements

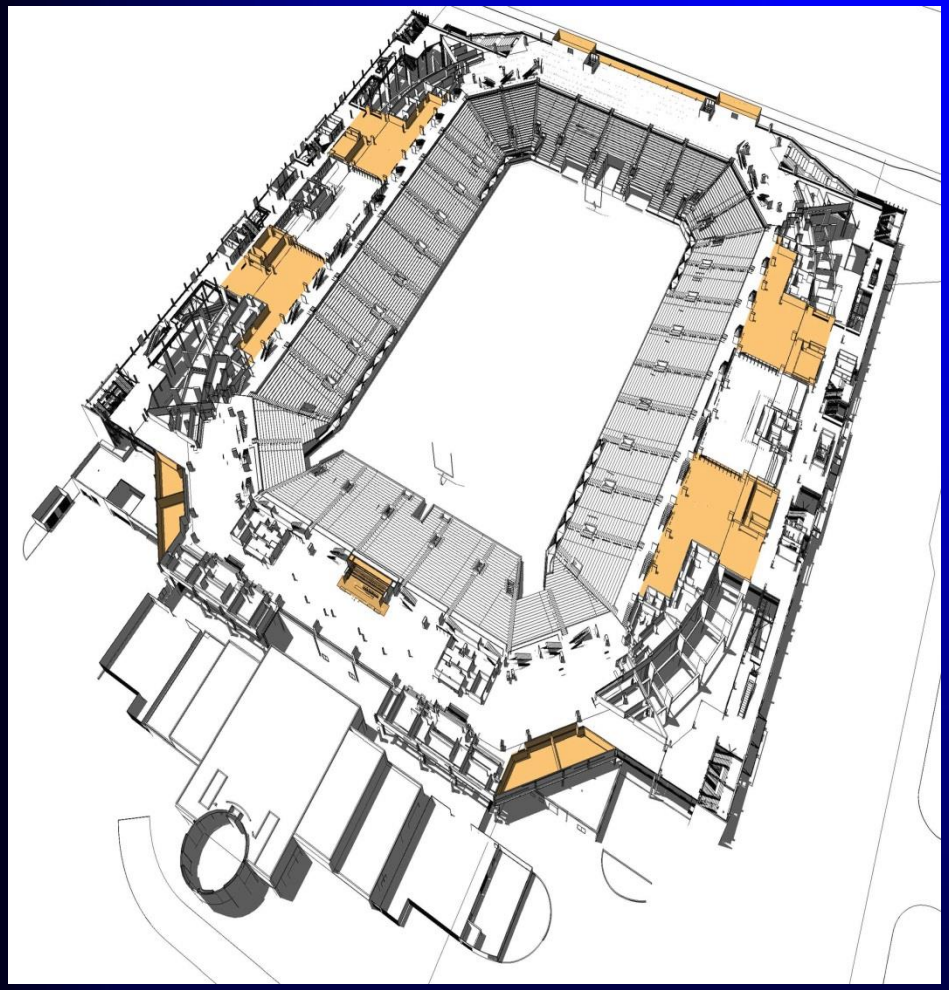
CAMPING WORLD
STADIUM

Terrace Level

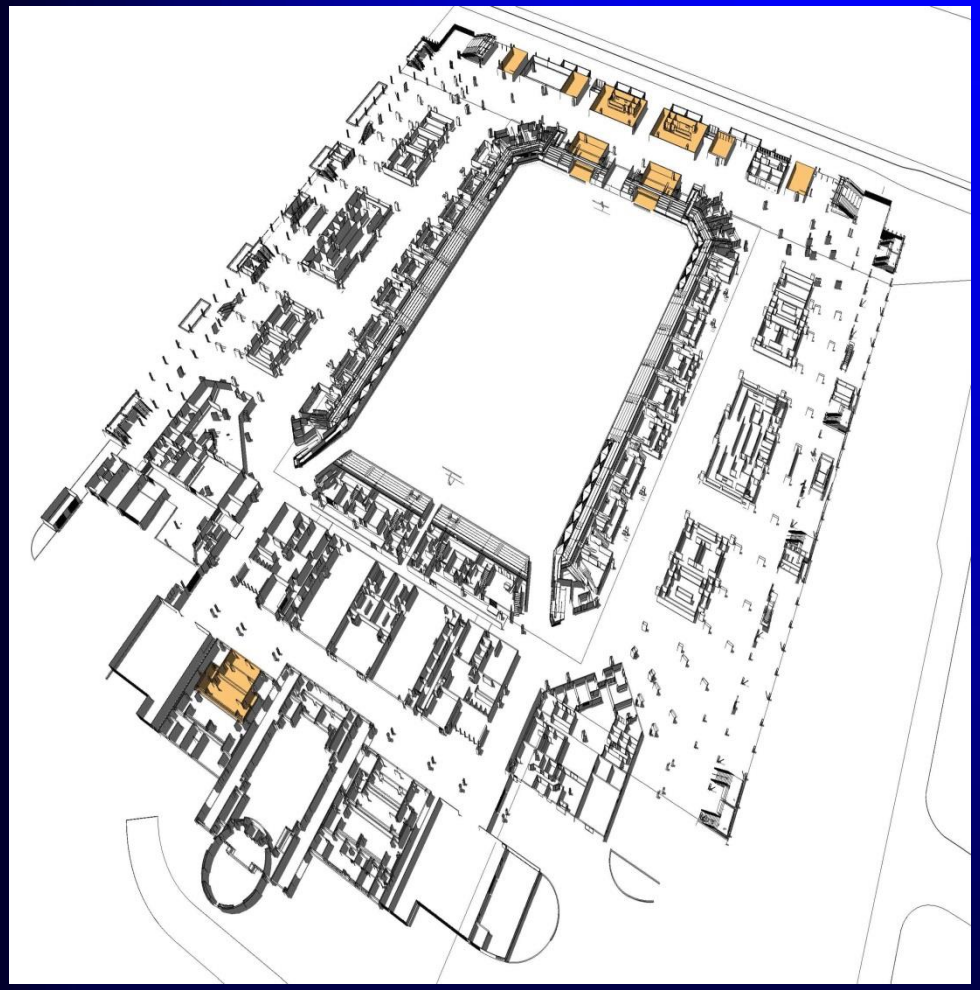




Plaza Level Fan Amenities



Field Level Amenities/Operations



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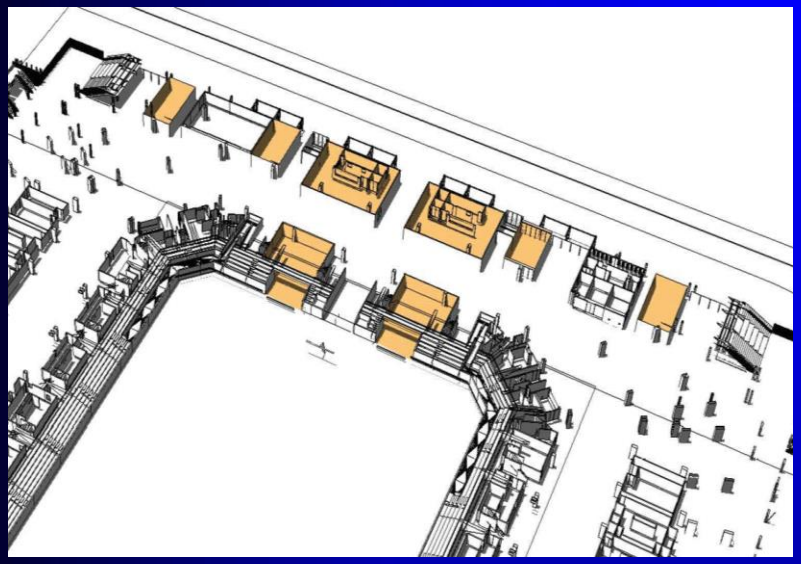
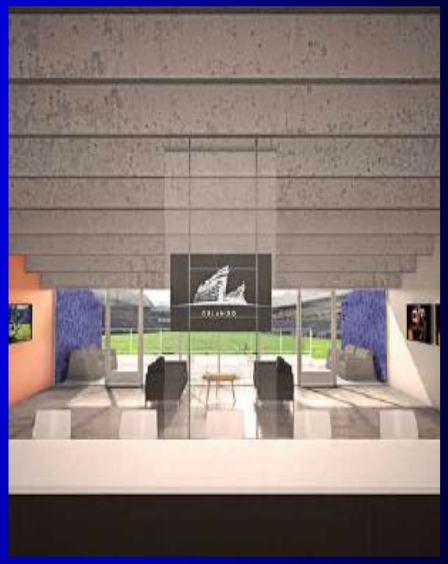




CAMPING WORLD STADIUM

Seating Mix

Concourse Connectivity

Seating Mix

Concourse Connectivity

Finishing the Job

- Completing the basic fan experience inside and outside of the venue
- Enhancing the operational performance for event operators - site selectors
- Adding seating capacity and diversity
- Remaining Competitive

Investment Request

- $60 million
  - Based on a conceptual design and cost estimation study produced in summer of 2017

CAMPING WORLD STADIUM

Community Investment

Fall 2015

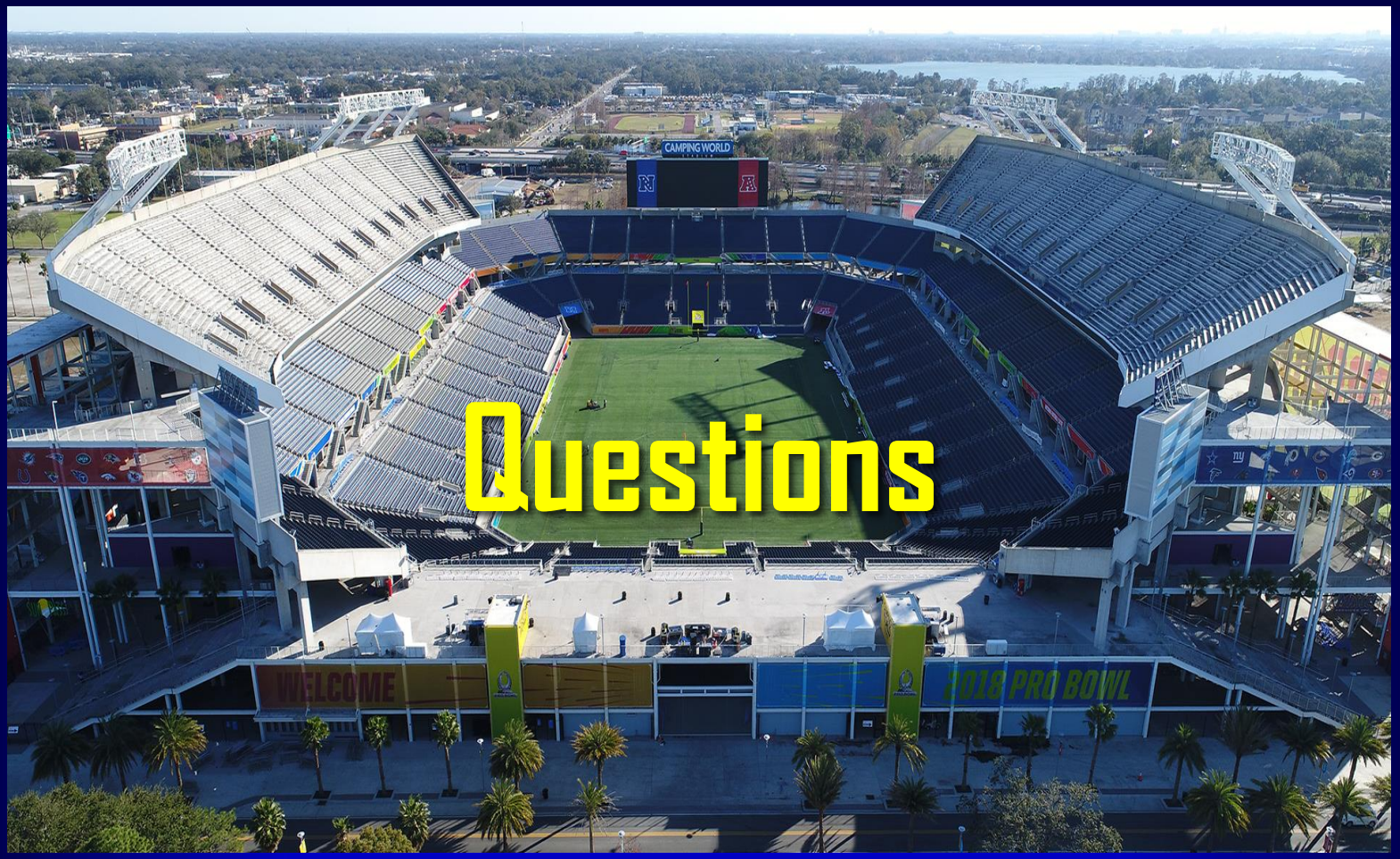
Summer 2018

PENDANA
AT WEST LAKES
apartment homes

PENDANA AT WEST LAKES

•Phase II: Senior Residences

- 120 apartment homes
- 90% low income tenants (60% or less of the median income)
- 10% very low income tenants (40% or less of the median income)



Questions

Action Requested

1. Approval of an Ordinance of the Board of County Commissioners of Orange County, Florida, Pertaining to Taxation in Orange County, Florida; Amending Article IV of Chapter 25 of the Orange County Code Section 25-140, Tourist Development Plan To Extend and Increase Funding For Visit Orlando, Authorize $60M for improvements to Camping World Stadium and allow capital spending and carryover for the Orange County Regional History Center.

Action Requested

2. Approval and execution of Eighth Addendum to 2007 Tourism Promotion Agreement between Orange County, Florida and Orlando/Orange County Convention & Visitors Bureau, Inc.

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