



# 2022 MARKET OVERVIEW

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### 2021 Travel Industry *Review & Recovery*

The day finally arrived, the moment that so many of us in the travel industry had been waiting for! The U.S. Borders reopened November 8th, 2021. When the U.S. closed its borders to the United Kingdom, Ireland, the 26 Schengen Area countries, South Africa, Iran, Brazil, India, and China at the onset of the pandemic, no one could have possibly guessed that restrictions would be in place for 19 months. That



is almost two years where families and friends were separated, explorers were stuck, and our country was isolated from the global community as we fought to contain the spread of the virus.

Thankfully, the action on November 8th was a major step forward in reuniting the world and the day that recovery of International Tourism could begin.

U.S. Travel Association, the Washington, D.C.–based organization that represents all sectors of the U.S. travel industry, pressed for many months for a safe reopening of our borders, both by land and air. Numerous studies have scientifically proven the safety of air travel, and other countries with high vaccination rates advanced plans earlier this year to safely reopen their borders to vaccinated individuals and rebuild their economies through travel.

The countries that were restricted from traveling to the U.S. made up just 17 percent of all countries worldwide, but these inbound markets accounted for a disproportionate 53 percent of all overseas visitors to the U.S. in 2019. Seven out of 10 of the biggest markets for U.S. inbound travel in 2019—U.K., China, Brazil, Germany, France, India, and Italy—were prohibited from nonessential travel last year. These few countries represent an outsize component of the international inbound travel segment and are vital to the U.S. travel industry—and by extension, the broader U.S. economy.

In 2019, U.S. travel was the third-largest export—behind only capital goods and industrial supplies—generating a staggering \$239 billion in income for the U.S. economy and directly supporting 1.2 million American jobs. Since the start of the pandemic last year, declines in international visitation are estimated to have resulted in nearly \$300 billion in lost export income and a loss of more than a million American jobs.

Our industry has its eyes on regaining what was lost and rebuilding this crucial travel sector. U.S. Travel economists estimate that it will take until 2024 to restore international inbound travel to

2019 levels, and much work remains to get to that point. Specifically, U.S. Travel was also calling on officials to fully reopen and restart visitor visa processing operations, as the average wait times for a visitor visa appointment in non-Visa Waiver Program countries exceed 14 months. U.S. Customs and Border Protection (CBP) operations must also be resourced to adequately handle the influx of international visitors.

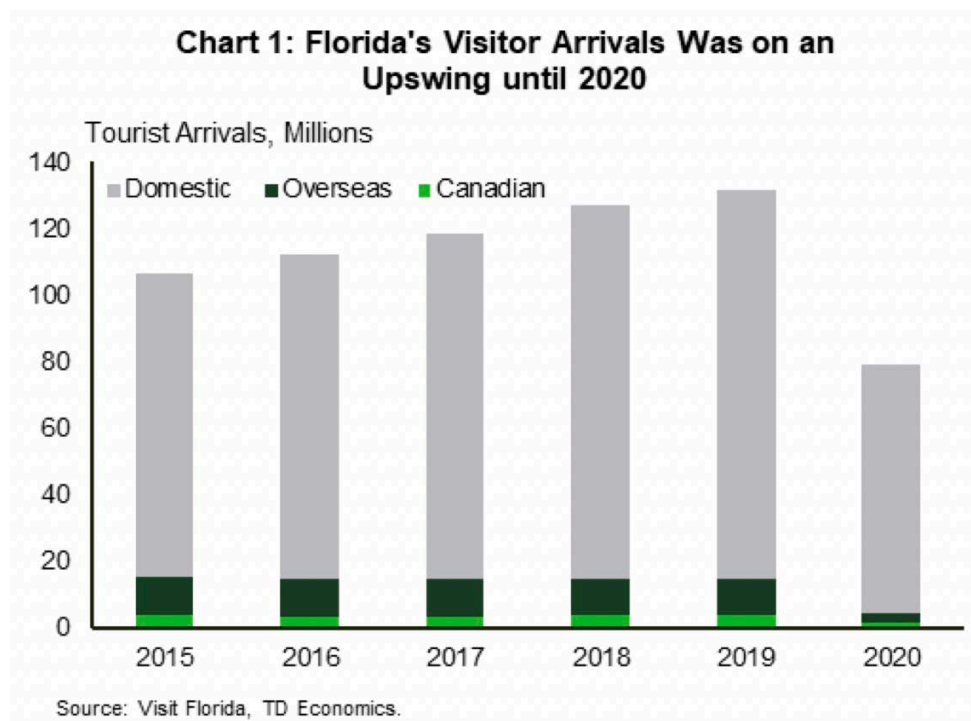
While we acknowledge the work ahead of us, we must also recognize the cultural significance of this moment. Travel is part of the fabric of our nation. Before the pandemic, we welcomed nearly 80 million international visitors a year. The U.S. is home to tens of millions of immigrants whose families are spread out across the world. Travel connects Americans to families, friends, and other cultures. Simply said, travel is essential to who we are.

We have come so far in our fight against the pandemic. It was an unparalleled feat of science that brought the world safe and effective COVID vaccines so quickly. People all across the United States and the world made enormous sacrifices to protect themselves and their communities. Now, we can take the first steps to reunite the world and move into a new phase in our recovery. There is still a lot of work ahead of us, but November 8 is a day that we recognized all that had been accomplished to get to that point.

### Florida Impact

- No other industry has been harder hit by the pandemic than tourism and few regions as hard as Florida. Between limits on crowds and capacity, restrictions on travel, and a slump in domestic demand due to health concerns, Florida's travel and tourism industry ground to a near halt in 2020.
- As restrictions ebb, the tourism sector is regaining momentum, but the lingering effects of the pandemic on the industry are becoming apparent. Leisure travel is showing clear signs of improving, but business travel – an important driver of hotel revenue – is much further behind. Theme parks have been resilient, but the cruise industry is operating under a cloud of legal uncertainty.
- The pandemic has also altered the employment landscape. Florida's tourism-related businesses have expressed increased difficulty in finding staff, suggesting that the national trend of elevated job openings and rising quit rates are also playing out in the state's travel and leisure sector.
- As with the pandemic, the future of the industry is still evolving. There are some positive outcomes heading into 2022, such as increasing visitor arrivals; however, the industry is still not out of the woods yet. With the emergence of a new strain of the coronavirus, which could prompt greater caution among would-be travelers and resurgence of restrictive policies, there is still some degree of uncertainty which the industry will have to navigate as the new year dawns.





The COVID-19 pandemic has been devastating to the international tourism market. With its warm climate and multiple world-renowned tourist attractions, Florida has been at the center of the damage. The sector was hard hit by the pandemic, which led to dramatic reductions in visitor arrivals.

As 2021 progressed, slowly but surely, the world is returning to Florida. The first to return are leisure travelers, especially Canadians looking to escape the Great White North for the winter. Business travelers are likely to be slower to return and are a more uncertain source of demand given changes to the nature of work and business travel brought on by the adoption of digital technologies.

As demand returns, the challenge for the industry may be ramping up employment. The industry has seen one of the largest increases in job opening and quit rates since the pandemic. Attracting and maintaining workers is likely to require higher wages, epitomizing the trend seen in the broader American economy. The industry's ability to attract sufficient workers will play a part in how quickly the Sunshine State is able to restore one of its most economically important industries to its former heyday.

Overall, Florida's recovery from the pandemic induced downturn is well underway, despite unevenness among market segments. With less restrictive policies and travelers eager to get back to their vacation hotspots, prospects for further progress are encouraging. This assumes no major

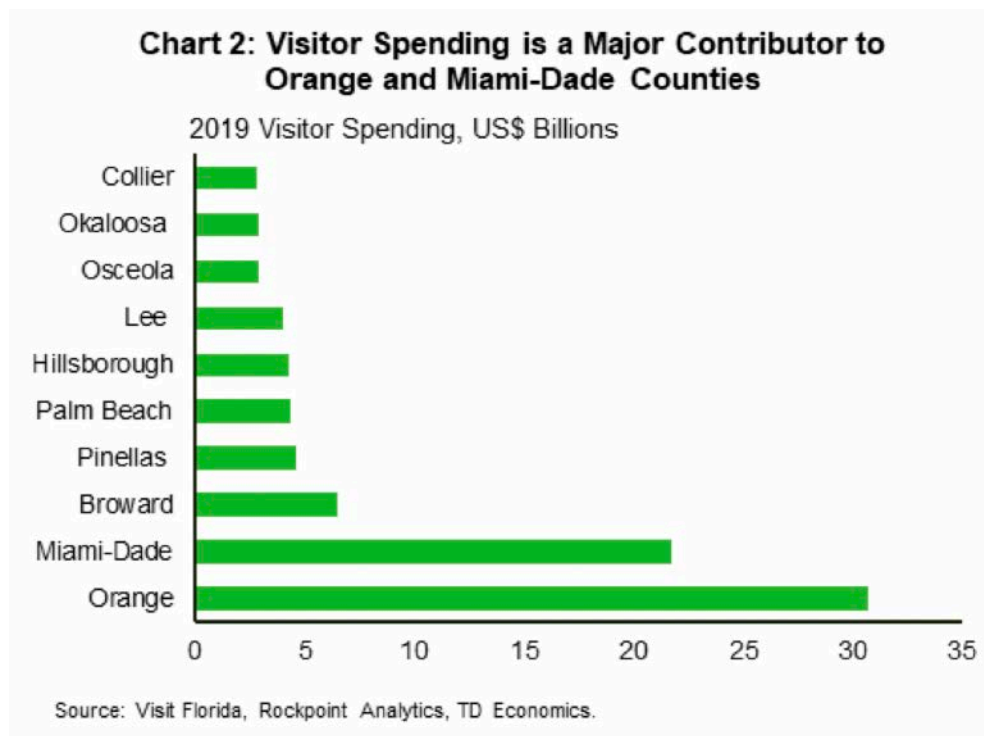
new curveballs on the Covid-19 front. In particular, the new Omicron variant could jeopardize those prospects, if it results in another wave of measures aimed at containing its spread.

#### Tourism is Vital to Florida's Economy...

Tourism is a major player in Florida's economic landscape. In 2019, the leisure and hospitality industry accounted for nearly 6% of real state GDP, 14% of total employment and 15% of state sales tax collection.<sup>1</sup>

Total visitors to Florida averaged 119 million in the five years prior to 2020, with domestic travelers accounting for the bulk of this number (Chart 1). Arrivals reached a record high of 131.4 million in 2019, just prior to the pandemic, growing at an annual average rate of 5.9% over the five-year period. According to research commissioned by Visit Florida (the state's tourism marketing agency), in 2019 out-of-state visitors added \$96.5 billion to Florida's economy, more than the entire GDP of 13 other states.

At a regional level, the areas most dependent on tourism are the Central region, followed by the Southeast and the Southwest. In 2019, valued added from the tourism industry was estimated at over \$30 billion for the Central Florida economy with the top two employers in the region being Walt Disney World Resort and Universal Orlando Resort. At the county level, Orange County (encompassing Orlando) and Miami-Dade topped visitor spending in 2019 at \$30.7 billion and \$21.7 billion respectively (Chart 2).



**Chart 3: Employment in Tourism Plumets as the Pandemic Ensues**



\*Seasonally adjusted.

Source: Bureau of Labor Statistics, TD Economics. Last observation: August 2021.

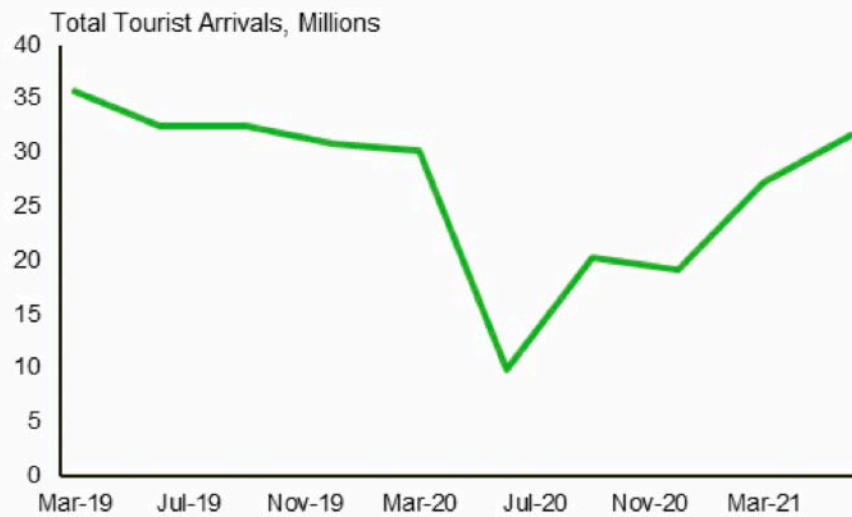
...And Then There Was COVID-19.

This was the lay of the land before the pandemic took hold. In March 2020, the first two official cases of COVID-19 were reported in Florida. With lockdown measures put into effect in April, many non-essential businesses were forced to close. These included major tourist attractions such as Walt Disney World Resort, Universal Orlando Resort, SeaWorld Orlando, Legoland Florida and Busch Gardens Tampa Bay. Employment in the industry began to decline in March 2020, but in April 2020 it plummeted by almost 43% (Chart 3) – the largest month-over-month decline in its history.

Visitor arrivals also declined sharply. Quarter-over-quarter tourist arrivals declined by 67.5% in the second quarter of 2020 (Chart 4). The year-over-year decline was even larger at almost 70%. As international borders were closed, overseas and Canadian travelers fell by a combined 96.5% in the second quarter of 2020 relative to the previous year.

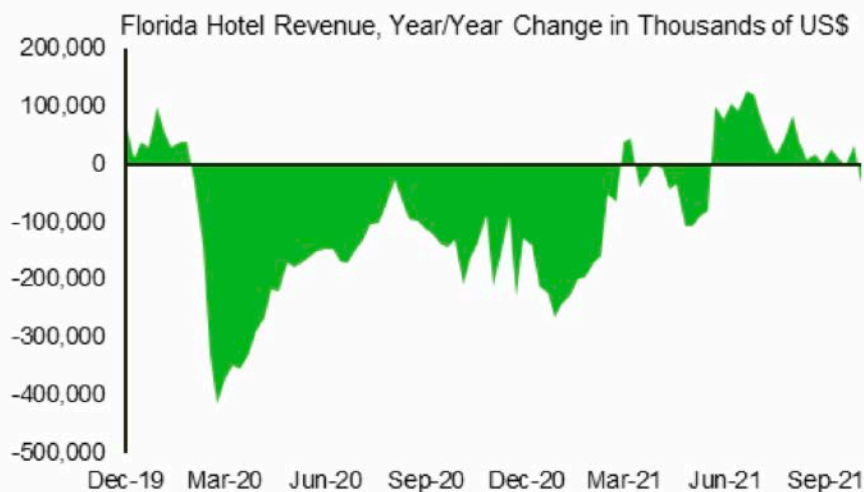


**Chart 4: Tourism Arrivals Take a Hit in Q2 2020 as the Pandemic Unfolds**



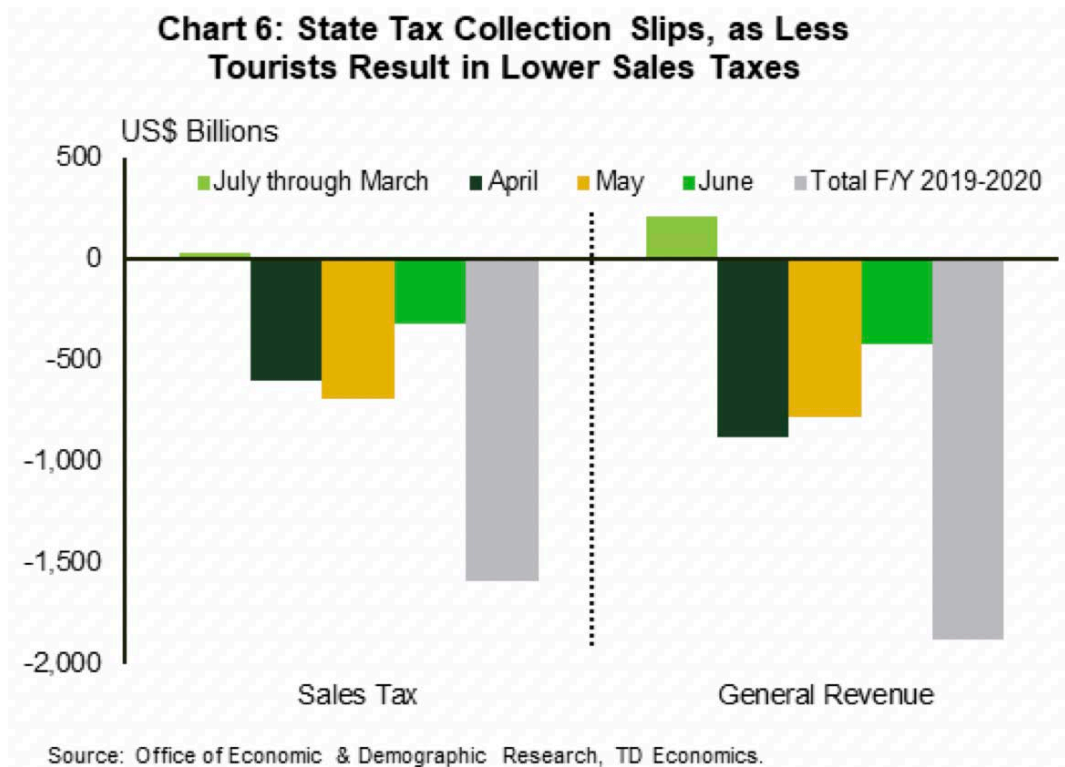
Source: Visit Florida, TD Economics. Last observation: June 2021.

**Chart 5: Hotel Revenues Tumble as the Pandemic Grinds Travel to a Halt**



Note: Starting February 28, 2021, revenue is compared to 2019 rather than 2020.  
Source: STR, Visit Florida, TD Economics. Last observation: October 2021.

The absence of international travel to Florida was disastrous for local businesses. The hotel industry was one of the hardest hit. Data from Visit Florida show that in April 2020, at the onset of the pandemic, hotel demand declined by approximately 78% relative to the same period in 2019. Hotel revenue in the state bottomed out between March and April of 2020, with hotels earning \$415 million less than they did during the same period in 2019 (Chart 5).

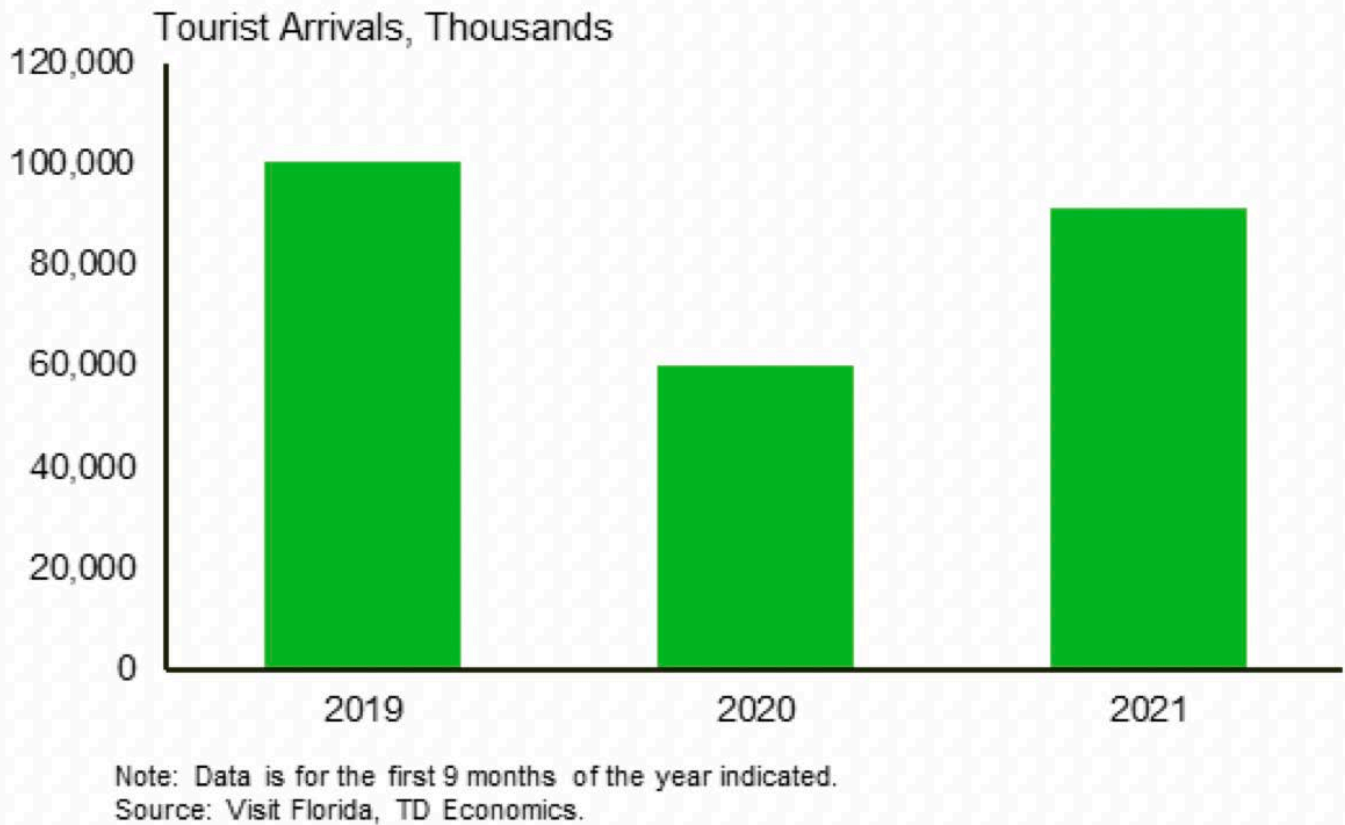


The impact was not limited to just the obvious sectors, but also to ancillary businesses such as retailers and transportation operators. In metro Orlando, for example, visitor arrivals were down by 53% from 75.8 million to 35.3 million between 2019 and 2020, with international visitor arrivals down almost 75%. According to data from the Central Florida Hotel & Lodging Association, the average visitor spends \$615 per trip to Orlando. The reduction of 40.5 million visitors likely resulted in almost \$25 billion in lost visitor spending.

As lockdowns went into effect, real state GDP declined by 30.1% (annualized) in the second quarter of 2020 – the largest quarterly decline on record. The decline was felt most acutely in the arts, entertainment, and recreation industry (down 92.9% annualized), followed closely by accommodation and food services (down 86.9%). These two categories account for the bulk of tourist related activities.

State and local governments that depend on sales and hotel tax revenues did not escape the effect of declining tourist arrivals. The Office of Economic & Demographic Research, which publishes the state's official revenue estimates, reported that Florida's General Revenue was \$1.9 billion (5.7%) lower than projected for the fiscal year (ending June 2020). Sales tax collection, the largest contributor to the General Revenue fund, was over \$1.5 billion lower than projected for the fiscal year. This loss occurred in the final quarter of the fiscal year (April-June) due to the effects of pandemic lockdowns (Chart 6). Losses were attributed largely to significant declines in the leisure and hospitality industry.

**Chart 7: Florida's Tourist Arrivals Rebound in the First 9 Months of 2021**



### Florida's Tourism Numbers Rebounding from the Pandemic

As 2021 progressed, tourism numbers have been promising. For the first nine months of 2021 (the most recent data available), Florida welcomed 91.5 million visitors, up 51.9% from the first nine months of 2020, but down 9.1% from the same period in 2019 (Chart 7). The upswing was driven largely by visitors from other parts of the United States (up 55.9% year-on-year). Overseas visitors were also up 30.8% and with the land border still closed, Canadian visitors were down a substantial 89.2% relative to the same period in 2020.

Data for the fourth quarter is expected to improve as the number of COVID-19 cases trend down in Florida and the U.S. border reopens to international travel for fully vaccinated individuals. Canadians are likely to lead the charge back to the Sunshine State. These expectations however may be tempered by the recent emergence of the Omicron variant of the virus, which may prompt the re-imposition of lockdown measures and travel restrictions.



### **The Canadian Snowbirds are Back**

Canada is overwhelmingly the top international source of tourists to Florida. There were 3.6 million Canadian visitors to Florida in 2019, more than double the second highest visitor destination, the United Kingdom.

In a 2018 Canada-Florida Economic Impact Study, the Canada Trade Commissioner Service estimated that 500,000 Canadian snowbirds descend on Florida during the winter months. With some staying up to six months, these visitors were estimated to contribute \$6.5 billion to the Florida economy. Given the restrictions imposed on international travel, this fillip has been missing for almost two years.

The relaxing of restrictions on air travel has helped to alleviate this problem, but as most snowbirds drive to the Sunshine State, the ban on non-essential land border crossing has, up until very recently, been a major roadblock. The removal of those restrictions for fully vaccinated travelers on November 8th is expected to boost visitor arrivals this winter.<sup>2</sup> Vacasa, a management company for vacation homes in North and South America, reported a notable rise in traffic on its online platform after the new rules were announced. Canadian users' views at rentals in snowbird-popular destinations in particular, jumped by 120%. As visitors prepare to head back to their winter escape in Florida, they are likely to face higher prices, as increased demand and the red-hot housing market have also pushed up the price of vacation rentals in the state.

### **International Travel Gearing up to Bounce Back**

The recent removal of travel restrictions did not only affect land borders, but also international air travel. The policy changes lifted COVID-19 travel restrictions for all fully vaccinated foreign nationals. Prior to this, there were bans on visitors from China, Canada, Mexico, India, Brazil and much of Europe as well as other nations. This news was welcomed with great enthusiasm by many in Florida's tourism industry, as prior to the pandemic, international travelers accounted for about 11% of tourism in the state.

Notwithstanding the lifting of the travel ban, the return of international travelers to the U.S. is likely to be gradual but, assuming no further setbacks, also steady. Canadians are some of the first to take advantage of the relaxed rules, while the first scheduled flights from some European countries are not due until March 2022.

The good news is that airports in Florida received intentions to resume transatlantic service from several international airlines as soon as possible after the policy took effect. On the day of the reopening, Miami International Airport reported that international arrivals were already running 5,000 ahead of the previous Monday.<sup>3</sup> Similarly, international seat capacity on flights through Orlando International Airport have already risen by 40,000 from what they were in October and are scheduled to increase by an additional 88,000 seats in December.<sup>4</sup>

## **Theme Parks on the Mend**

The return of international visitors is great news for the major attractions (and hotels) that cater to them. Pent-up demand for travel has also allowed these businesses to raise prices, thereby further padding their bottom lines. Global hospitality data and analytics firm STR reported that in Tampa Bay for example, the average rate for a hotel room rose 33.6% in October 2021 relative to October 2019.<sup>5</sup>

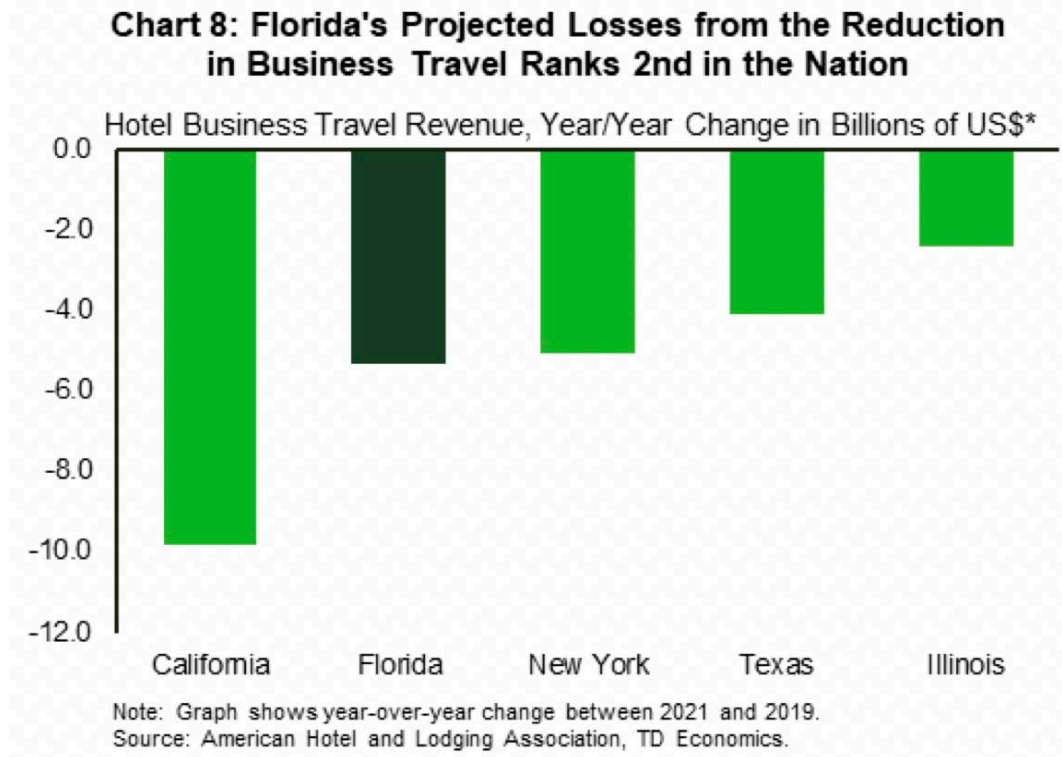
Similarly, entertainment venues in the Sunshine State have managed to carve out record revenues coming out of the pandemic. SeaWorld announced its largest Q3 earnings to date, an astonishing 391% increase over the same period in the previous year and 10% over Q3 2019. While quarterly park attendance was up significantly relative to 2020 (7.2 million vs 1.5 million) it was still down by 900,000 relative to third quarter 2019.<sup>6</sup>

Universal Orlando also had a record-breaking quarter. The Chairman and CEO of Comcast, (Universal Orlando's parent company), noted that the three months ending September 2021 was the most profitable in the theme park's history. This stellar performance helped the theme parks division of the company to earn approximately \$1.4 billion in revenue, significantly above the \$385 million earned in Q3 2020.<sup>7</sup>

The theme parks and related business units of Disney also reported rising income. For the quarter ended October 2nd 2021, this business segment brought in \$5.45 billion in revenues, 99% higher than the \$2.77 billion earned in the same period of 2020.<sup>8</sup>

Overall, pent-up domestic demand and higher pricing has aided theme parks in recovery and will assist in covering prior periods deficits. While new variants continue to pose a threat, the stage is set for 2022 to be an even better year for this segment of Florida's tourism industry

## Leisure Up but Business Down and Cruise in a Quandry



Despite the increase in tourist arrivals, the gains within the industry have been uneven, with business travel lagging behind leisure. According to the Florida Restaurant and Lodging Association, Florida's hospitality industry is projected to experience a reduction in business travel for 2021 valued at \$5.3 billion. The association estimates that business trips to Florida will be down 61% this year compared to 2019. Relative to 2019, Florida is projected to end 2021 with the second-highest business travel losses in the nation, only behind the state of California (Chart 8).

Finally, the reopening of the cruise industry, which has been shut down since March 2020, has been problematic. Though several cruise companies based in the Sunshine State have already resumed operations since this summer, their continued operation faces legal challenges. Cruise lines have been requiring passengers to show proof of vaccination in order to board; however, this practice contravenes legislation put in place (in July) by the state's Governor prohibiting a company from requiring any customer to show proof of vaccination. A federal judge ruled in August that Norwegian Cruise Line can require their passengers departing from Florida to show vaccination status before boarding. The Governor however, has vowed to appeal this ruling. The battle has become even more complicated as several destination ports, in the Caribbean for example, have required that cruise passengers be fully vaccinated in order for the ships to call at their ports. As the legal challenges make their way through federal court, the operations of cruise companies continue with that cloud hanging overhead. Nevertheless, the industry has started to regain speed, though it will take some time before it returns to pre-pandemic levels of operation.

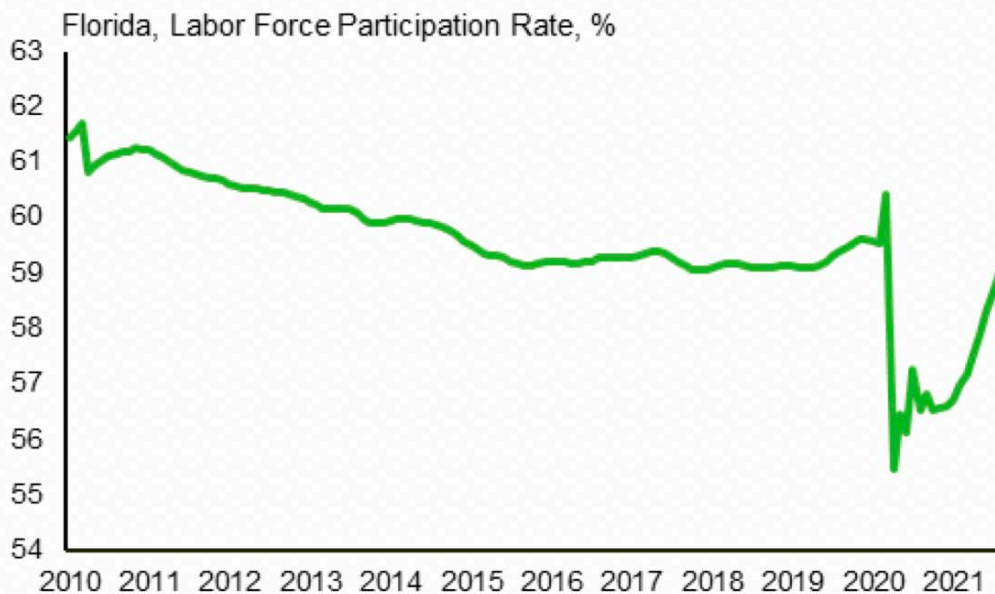


## The Pandemic Has Changed the Employment Landscape in Florida's Tourism Industry

As it did throughout the United States, Florida's labor force participation took a hit during the pandemic. While the metric has been on the rise since then, it still remains below the pre-pandemic level (Chart 9).

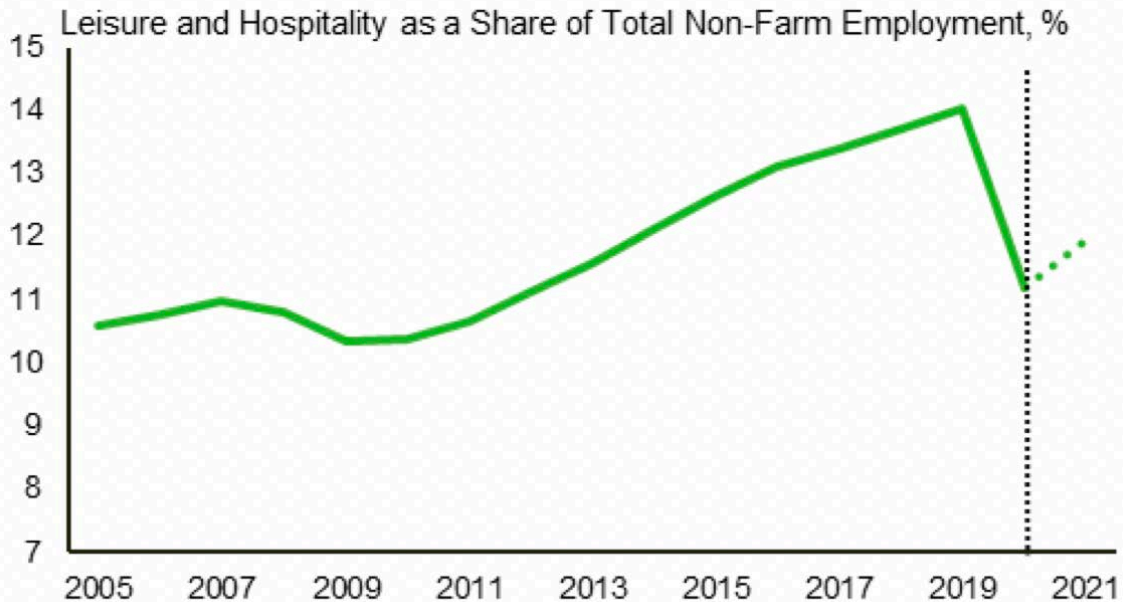
Anecdotal evidence from employers in the tourism sector suggests that the lack of labor supply is more severe in the sector relative to others. Several businesses in the industry, from hotels to restaurants have noted that staffing is a major issue, and it is negatively affecting their operations. This is further supported by a decline in leisure and hospitality's share of total employment in Florida (Chart 10). In 2020, employment in the industry accounted for 11% of total nonfarm employment, down 2.9 percentage points from 2019. The share has been rising throughout 2021, but still remains below the pre-pandemic level.

**Chart 9: Florida's Labor Force Participation  
Increasing but Still below Pre-pandemic Levels**



Source: Bureau of Labor Statistics, TD Economics. Last observation: August 2021.

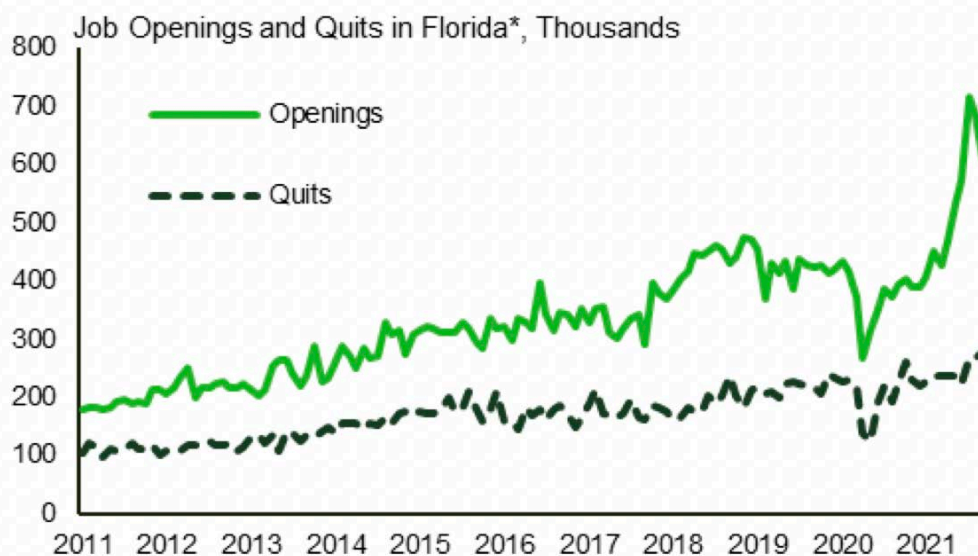
**Chart 10: Tourism Sector's Share of Employment in Florida Slipped During the Pandemic**



There were 609,000 job openings in Florida in September and about 279,000 people voluntarily quit their jobs (Chart 11). National data present an even more sobering picture – 4.4 million Americans quit their jobs (a 3% increase over August and the highest rate ever recorded since data collection began in 2000). Nationally, quit rates were particularly high in the hospitality and leisure sector (Chart 12). Even with quits rising, the leisure and hospitality industry still shed 324k jobs between July and September. While industry-specific data is not available at the state level, it is reasonable to extrapolate a similar occurrence in Florida.

The reasons for the lack of labor supply are many and varied, some related to wage levels, personal preferences, childcare options and others to health concerns. Many positions in the hospitality industry are low paying, thus the pullback in the industry during the pandemic gave many of these workers an opportunity to retrain. Despite double-digit wage increases in recent months – the highest among all Florida industries (Chart 13), the leisure and hospitality industry continues to face worker shortages. It remains to be seen how long worker shortages last, but as long as they do, they will act as a constraint on the pace of recovery in the industry.

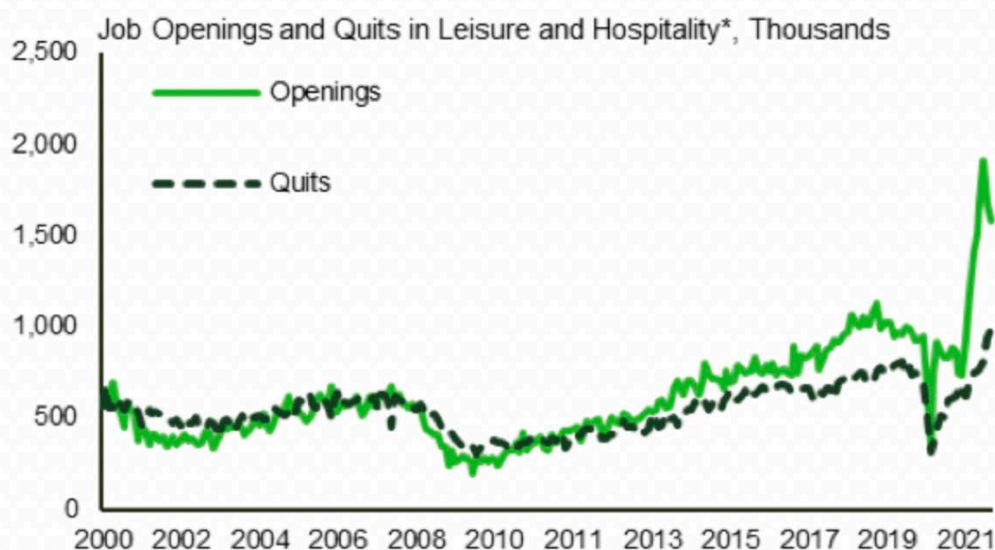
**Chart 11: Florida's Labor Market Tracks National with Elevated Job Openings and Rising Quit Rates**



\*Seasonally adjusted.

Source: Bureau of Labor Statistics, TD Economics. Last observation: September 2021.

**Chart 12: Job Openings and Quits Rise Nationally in the Leisure and Hospitality Industry**



\*Seasonally adjusted.

Source: Bureau of Labor Statistics, TD Economics. Last observation: September 2021.



## The Latest Curveball - Omicron

As of this writing, a new variant of the coronavirus, dubbed Omicron, has emerged. If the new variant triggers another wave of infections globally then all bets are off. More lockdowns, more travel restrictions and a return of travel hesitancy could be in the forecast. This time around, policymakers appear to be leaning more toward vaccinations and testing as opposed to the widespread lockdowns and travel bans that were prevalent at the start of the pandemic. Still, the U.S. administration imposed a temporary ban on non-U.S. citizens travelling from South Africa, where the variant was first detected, and seven other Southern African nations. The ban, however, is not as extensive as previous travel bans that the U.S. has imposed and since repealed, and Southern Africa represents a relatively small share of travelers to the United States.

To combat the variant, President Biden has also reduced the testing timeline from 72 to 24 hours for travelers entering the U.S. regardless of vaccination status and extended a mask mandate on airplanes and other forms of public transportation. As these measures take effect and more information about the Omicron variant becomes available, they are likely to have an impact of Florida's tourism sector, particularly with respect to international travelers. The scope of the impact remains uncertain and the Omicron unknown represents a downside risk to the industry.

### Bottom Line

The tourism industry in Florida is a major contributor to the economic success of the state. It plays a significant role in employment, business activity and government revenues. The onset of the COVID-19 pandemic was a major blow to the industry. The imposition of lockdown measures and travel restrictions for visitors from international destinations resulted in the temporary closure of many tourism related businesses.

As government responses became less restrictive, the industry began to emerge from the worst of its effects. Initially, recovery relied heavily on domestic visitors. With the removal of travel bans, international visitors are poised to make a comeback, barring any future negative developments related to the Omicron variant. The bounce back of international travel is expected to be led by a surge of snowbird visitors from Canada that have missed their usual Florida getaway over the last 20 months.

Theme parks and attractions in the state are already reporting record-breaking revenue as 2021 comes to a close. They have been able to weather the worst of the pandemic and should continue to improve heading into 2022.

Unfortunately, business travel has not experienced the same rebound and is likely to be slower to recover as the pandemic has reoriented several companies' approach to corporate travel. The cruise industry is also facing legal challenges as they attempt to navigate the post-pandemic world aboard a ship.

Finally, one concerning repercussion of the significant layoffs that occurred during the height of the pandemic is a reduction in the leisure and hospitality work force. As recovery ramps up in the industry, attracting and maintaining workers will be key to the industry's future success.

### Sources:

1. Sales taxes were the largest contributor to the state's general revenue at 76% in FY 2018/2019.
2. The Canadian government's removal of required PCR tests for visits under 72 hours may help to further increase shorter trips to the state.
3. Sun Sentinel, "Welcome back! With COVID restrictions lifted, South Florida tourism spots throw open their doors to international travelers", <https://www.sun-sentinel.com/business/fl-bz-international-tourists-covid-florida-20211108-3o7xscppaba4jln3c5dgsbah34-story.html>
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6. SeaWorld Entertainment, Investor Relations, "Q3 2021 Earnings Release", [https://s1.q4cdn.com/392447382/files/doc\\_news/SeaWorld-Entertainment-Inc.-Reports-Third-Quarter-and-First-Nine-Months-2021-Results-2021.pdf](https://s1.q4cdn.com/392447382/files/doc_news/SeaWorld-Entertainment-Inc.-Reports-Third-Quarter-and-First-Nine-Months-2021-Results-2021.pdf)
7. Spectrum News, "Universal theme parks stay profitable as pandemic recovery continues", <https://www.mynews13.com/fl/orlando/news/2021/10/28/universal-theme-parks-profitable-comcast-earnings?web=1&wdLOR=cF848A573-DE0D-4B70-AD12-4E81986F96D7NAHB>, "What Home Buyers Really Want", Mar 2021,
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*The Enclave*

# **Domestic & International Visitation**



### Domestic Visitation



## U.S. Market Update

September 2021

### STATE OF THE MARKET

- The U.S. economy's recovery slowed considerably in Q3 with an estimated growth of just 2.0% for the quarter, which is the slowest since Q2 of 2020. Survey of Professional Forecasters still anticipates 2021 to grow by a robust 5.5% by the end of the year.
- National unemployment had peaked at 14.8% in April 2020, according to the U.S. Bureau of Labor Statistics, but has since dropped down to 4.6% in October 2021. Orlando MSA's unemployment is slightly lower at 4.4%.
- U.S. Traveler Sentiment trackers suggest that there is an increasing sense of perceived safety of travel, but most feel the pandemic is here for the long-haul and the travel industry will continue to struggle to provide adequate service. There is a strong sense of optimism for travel in 2022.
- At a local level, the Orlando lodging sector has been slow in recovering from the Delta variant wave that hit at the end of the summer. Occupancy had nearly recovered to 2019 levels in June and July but fell significantly in August and only recently began to regain steam in October/November. Advance hotel booking pace has also been improving since August and has nearly bounced back for Transient bookings, but Group bookings remain suppressed at approximately half of where they were pre-pandemic. Florida, Georgia and Texas lead as the top origin markets for Orlando future hotel bookings.

#### Lodging Indicators: Competitors YTD thru October 2021 (vs 2019)

Destination	OCC	% chg	ADR	% chg
Orlando	56%	▼ -26%	\$ 116	▼ -8%
Chicago	50%	▼ -30%	\$ 120	▼ -19%
Las Vegas*	65%	▼ -27%	\$ 134	▲ 0%
Los Angeles	63%	▼ -22%	\$ 159	▼ -13%
Miami	66%	▼ -13%	\$ 213	▲ 11%
New York	57%	▼ -34%	\$ 190	▼ -24%

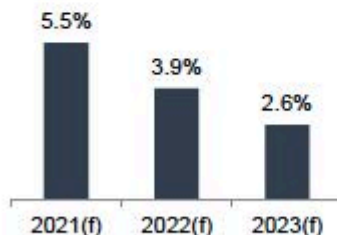
Source: STR Lodging Review, Nov 2021; \*LVCVA data thru October

#### Orlando Advance Hotel Booking Pace by Future Month of Travel (vs 2019)

vs. Prior Yr	Total	Group	Transient
Oct-21	▼ -25%	▼ -57%	▼ -9%
Nov-21	▼ -22%	▼ -42%	▼ -13%
Dec-21	▼ -18%	▼ -42%	▼ -10%
Jan-22	▼ -31%	▼ -29%	▼ -32%
Feb-22	▼ -37%	▼ -46%	▼ -33%
Mar-22	▼ -39%	▼ -28%	▼ -41%

Source: TravelClick, Nov. 19, 2021

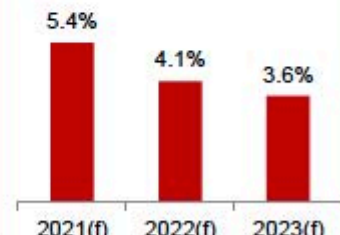
#### Real GDP Growth (% Change)



#### Inflation (% Change)



#### National Unemployment (% Change)



Source: Survey of Professional Forecasters, Q4 2021

Created by Market Research & Insights - Visit Orlando

## International Visitation



### ARGENTINA Market Update November 2021

#### ECONOMY/POLITICS

Argentine government has been trying to curb country's extremely high inflation (52.1% in October) by freezing prices for 1,000+ household goods until early 2022. It was also pouring US dollars into the economy to prevent Peso's slide.

Despite all efforts, Argentinean Peso continued to fall against the USD, hitting an all time low on Nov. 23, 2021 at 100.58.

The economy is expected to grow slower in 2022 as the inflation continues to erode spending and the renegotiations of the \$45 billion debt owed to the IMF and the outcome of November's elections cloud the outlook.

#### TRAVEL

As of September YTD, U.S. welcomed nearly 193,000 Argentines, reaching 29% of the 2019 volume during same time period.

Air arrivals from Argentina to Orlando are at 27% of 2019 levels through September 2021. Direct seat capacity to Orlando from Argentina was halted even before the pandemic in 2019 and is yet to be reinstated.

At this time, Miami is the only airport in the state of Florida with direct service from Argentina (Buenos Aires), with seat capacity gradually increasing for Q1 2022.

#### Direct Seats to Select U.S. Destinations

% Change Year over Year

Destination	2021 v 2019 Q4 % change	2022 v 2019 Q1 % change
Orlando	▼ -100%	▼ 0%
Los Angeles	▼ -100%	▼ -100%
Miami	▼ -39%	▼ -42%
New York	▼ -30%	▼ -33%

Source: Diio Mi, November 2021

#### Passenger Arrivals to Select U.S. Destinations

% Change from 2019

Destination	Arrivals YoY Sep 2021	Arrivals YTD Sep 2021
Orlando	▼ -63%	▼ -73%
Los Angeles	▼ -73%	▼ -81%
Miami	▼ -61%	▼ -69%
New York	▼ -67%	▼ -82%

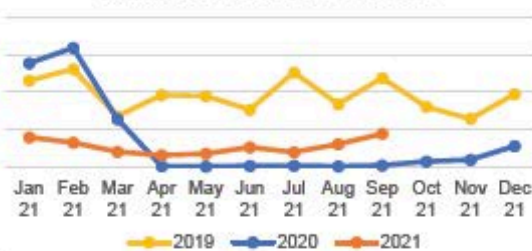
Source: Diio Mi, November 2021

#### Advance Hotel Bookings: Argentina to Orlando



Source: TravelClick

#### Monthly Air Arrivals to Orlando



Source: Diio Mi

#### Arrivals to the U.S.

September 2021	Volume	% chg from 2019
Monthly	22,246	↑ 15%
YTD	176,932	↓ -22%

Source: NTT, COR Report

#### Monthly Exchange Rate

	USD per ARS	% chg from Prior Year
Oct-21	0.0100	↓ -22%
Oct-20	0.0129	↓ -25%

Source: Oanda



## International Visitation



### BRAZIL Market Update November 2021

#### ECONOMY

Brazil's economy is expected to grow at the slowest rate in the region in 2022 due to low consumer confidence and spending.

High inflation, rising interest rates and higher debt levels among low-income households is contributing to the economic challenges.

Tourism Economics is expecting Real to strengthen in 2022 after losses incurred in 2021.

Brazil will be holding its general elections on Oct. 2, 2022.

#### TRAVEL

New COVID-19 cases in Brazil have been falling substantially since July. More than half (61%) of the population is now fully vaccinated.

Travel to the U.S. has been almost non-existent in 2021 (down 94% YTD through September) due to the U.S. enforced ban.

Despite the lifting of the ban in early November, direct seat capacity from Brazil remains suppressed. As of late November, Miami, Orlando and Ft. Lauderdale are the three airports with direct seats from Brazil in Florida. Miami accounts for nearly 70% of all capacity, while Orlando's share is at approximately 20%.

Due to loss of middle class households during the pandemic and the challenges in obtaining visas, TE expects Brazil's recovery to the U.S., and to Orlando, to be the slowest of the key origin markets.

#### Direct Seats to Select U.S. Destinations

% Change Year over Year

Destination	2021 v 2019 Q4 % change	2022 v 2019 Q1 % change
Orlando	▼ -90%	▼ -77%
Ft. Lauderdale	▼ -60%	▼ -45%
Los Angeles	▼ -100%	▼ -100%
Miami	▼ -62%	▼ -45%
New York	▼ -55%	▼ -45%

Source: Diio Mi, November 2021

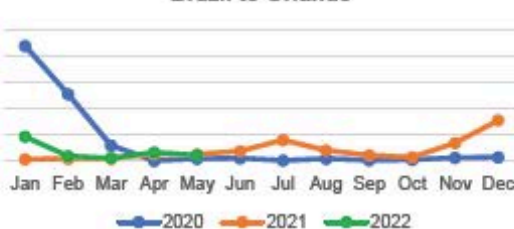
#### Passenger Arrivals to Select U.S. Destinations

% Change from 2019

Destination	Arrivals YoY Sep 2021	Arrivals YTD Sep 2021
Orlando	▼ -94%	▼ -96%
Ft. Lauderdale	▼ -84%	▼ -84%
Los Angeles	▼ -91%	▼ -92%
Miami	▼ -91%	▼ -92%
New York	▼ -89%	▼ -96%

Source: Diio Mi, November 2021

#### Advance Hotel Bookings: Brazil to Orlando



Source: TravelClick

#### Monthly Air Arrivals to Orlando



Source: Diio Mi

#### Arrivals to the U.S.

September 2021	Volume	% chg from 2019
Monthly	9,652	▼ -94%
YTD	86,685	▼ -94%

Source: NTTO, COR Report

#### Monthly Exchange Rate

	USD per BRL	% chg from Prior Year
Oct-21	0.18	▲ 2%
Oct-20	0.18	▼ -27%

Source: Federal Reserve Board

## International Visitation



### CANADA Market Update

November 2021

#### ECONOMY

After a strong performance so far this year, Canada's economic growth is expected to moderate in 2022.

The good news is that healthy job market, heightened household savings, and loosening COVID-19 related restrictions should have a positive impact on travel consumption going into 2022.

Canadian Dollar has been fluctuating between \$0.78 and \$0.83 since May.

#### TRAVEL

Canada's daily COVID-19 cases have leveled off at just over 2500 in the second half of November. Vaccination level is high - 77% of population is fully vaccinated.

U.S. opened the land border with Canada on November 8, 2021. Vaccinated visitors from Canada can enter the U.S. with a negative COVID-19 test result. Vaccinated Canadians returning from the U.S. will have to provide a negative PCR test upon entry. As of Nov. 30, fully vaccinated Canadian residents leaving and returning within 72 hours, will be exempt from the PCR test upon return. This may boost border destination travel and affect Orlando's share short-term.

Air arrivals from Canada to the U.S. were down 93% through Aug. 2021 vs. the same time in 2019. Through Sep. 2021, air arrivals to Orlando were still only at 6% of 2019 levels. However, looking ahead, direct seat capacity to Orlando is growing substantially with Q1 2022 only 11% behind the 2019 levels.

#### Direct Seats to Select U.S. Destinations

% Change Year over Year

Destination	2021 v 2019 Q4 % change	2022 v 2019 Q1 % change
Orlando (MCO/SFB)	▼ -51%	▼ -11%
Las Vegas	▼ -57%	▼ -17%
Los Angeles	▼ -55%	▼ -4%
Miami	▼ -65%	▼ -26%
New York	▼ -60%	▼ -21%

Source: Diio Mi, November 2021

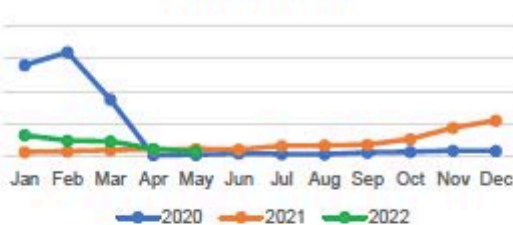
#### Passenger Arrivals to Select U.S. Destinations

% Change from 2019

Destination	Arrivals YoY Sep 2021	Arrivals YTD Sep 2021
Orlando	▼ -76%	▼ -94%
Las Vegas	▼ -71%	▼ -93%
Los Angeles	▼ -70%	▼ -89%
Miami	▼ -85%	▼ -95%
New York	▼ -74%	▼ -92%

Source: Diio Mi, November 2021

#### Advance Hotel Bookings: Canada to Orlando



Source: TravelClick

#### Monthly Air Arrivals to Orlando



Source: Diio Mi

#### Air Arrivals to the U.S.

August 2021	Volume	% chg from 2019
Monthly	163,365	▼ -76%
YTD	421,357	▼ -93%

Source: NTT, COR Report

#### Monthly Exchange Rate

	USD per CAD	% chg from Prior Year
Oct-21	0.80	▲ 6%
Oct-20	0.76	▼ 0%

Source: Federal Reserve Board



## International Visitation



### COLOMBIA Market Update

November 2021

#### ECONOMY

Colombian economy continued healthy recover through Q3 2021, mostly supported by declining unemployment, improving consumer sentiment and solid retail spending.

The economy is anticipated to expand 3.9% in 2022, assuming increasing public debt and the uncertainty over the upcoming presidential elections will not impede growth.

Colombia will hold its presidential elections on May 29, 2022.

#### TRAVEL

In 2020, 270,000 Colombians visited the U.S., according to NTT. The recovery has been steady, with nearly 678,000 Colombian arrivals to the U.S. through Sept. 2021, exceeding pre-pandemic 2019 level by 11%. In fact, as of Sept., Colombia is U.S.'s third largest international origin market after Canada and Mexico.

Air arrivals to Orlando have been on the steady rise since March, with July-Sep 2021 numbers exceeding 2019 levels for the same month.

Looking ahead, direct seat capacity from Colombia to Orlando is expected to surpass 2019 in Q1 2022. Advance hotel booking data from TravelClick indicate a continued interest in the destination. As of late November, advance hotel bookings for travel in Dec. 2021 are pacing ahead of 2019 levels. Booking levels for travel in Jan. 2022 are still pacing 40% below 2020 pre-pandemic levels. Booking trends suggest rather short booking windows (4-6 weeks out).

#### Direct Seats to Select U.S. Destinations % Change Year over Year

Destination	2021 v 2019 Q4 % change	2022 v 2019 Q1 % change
Orlando	▲ 12%	▲ 19%
Ft. Lauderdale	▲ 14%	▲ 16%
Los Angeles	▼ -29%	▲ 1%
Miami	▲ 52%	▲ 45%
New York	▲ 56%	▲ 70%

Source: Diio Mi, November 2021

#### Passenger Arrivals to Select U.S. Destinations % Change from 2019

Destination	Arrivals YoY Sep 2021	Arrivals YTD Sep 2021
Orlando	▲ 18%	▼ -13%
Ft. Lauderdale	▲ 38%	▲ 50%
Los Angeles	▲ 17%	▼ -29%
Miami	▲ 6%	▲ 9%
New York	▲ 50%	▲ 23%

Source: Diio Mi, November 2021

#### Advance Hotel Bookings: Colombia to Orlando



Source: TravelClick

#### Monthly Air Arrivals to Orlando



Source: Diio Mi

#### Arrivals to the U.S.

September 2021	Volume	% chg from 2019
Monthly	71,755	▲ 8%
YTD	753,975	▲ 11%

Source: NTT, COR Report

#### Monthly Exchange Rate

	USD per COP	% chg from Prior Year
Oct-21	0.0003	▲ 1%
Oct-20	0.0003	▼ -10%

Source: Oanda

## International Visitation



### MEXICO Market Update

November 2021

#### ECONOMY

Mexico's economy stalled somewhat in Q3, yet forecasts for Q4 are positive as cases continue to fall and vaccination rates are picking up. Supply chain issues, however, are still holding back several industries, such as automobile production.

Consumer confidence increased for the second straight month in October 2021, although inflation rose to the highest level it's been since December 2017.

#### TRAVEL

New COVID cases have been falling consistently in Mexico since peaking in August. Vaccination rate remains low, however, with just 50% of the total population being fully vaccinated.

The U.S. opened the land border with Mexico starting on November 8, 2021 for fully vaccinated travelers. Air travelers to the U.S. from Mexico also must show proof of being fully vaccinated to enter the country. There are no quarantine measures required for Mexican travelers upon their return.

Mexico has been the top international origin market for Orlando with respect to air arrivals YTD through September 2021, trailing pre-pandemic levels by only 38%. Direct seat capacity to Orlando improved substantially in Q4 2021, surpassing 2019 by 18% and is expected to remain on par with pre-pandemic levels for Q1 2022.

TravelClick advance hotel booking data suggest healthy interest in the destination albeit relatively short booking windows for Mexican travelers.

#### Direct Seats to Select U.S. Destinations % Change Year over Year

Destination	2021 v 2019 Q4 % change	2022 v 2019 Q1 % change
Orlando	▲ 18%	▲ 1%
Las Vegas	▼ -19%	▼ -14%
Los Angeles	▲ 16%	▲ 14%
Miami	▲ 12%	▲ 21%
New York	▼ -6%	▼ -21%

Source: Diio Mi, November 2021

#### Passenger Arrivals to Select U.S. Destinations % Change from 2019

Destination	Arrivals YoY Sep 2021	Arrivals YTD Sep 2021
Orlando	▼ -25%	▼ -36%
Las Vegas	▲ 7%	▼ -13%
Los Angeles	▲ 20%	▼ -4%
Miami	▲ 3%	▲ 12%
New York	▼ -1%	▼ -15%

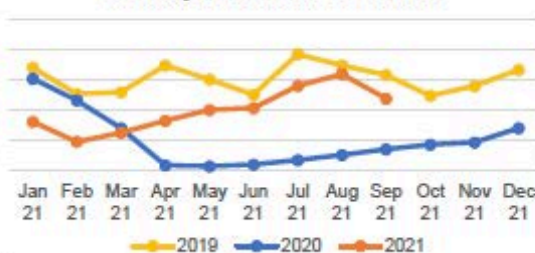
Source: Diio Mi, November 2021

#### Advance Hotel Bookings: Mexico to Orlando



Source: TravelClick

#### Monthly Air Arrivals to Orlando



Source: Diio Mi

#### Air Arrivals to the U.S.

September 2021	Volume	% chg from 2019
Monthly	304,730	▲ 32%
YTD	2,430,110	▲ 20%

Source: NTTO, COR Report

#### Monthly Exchange Rate

	USD per MXN	% chg from Prior Year
Oct-21	0.05	▲ 4%
Oct-20	0.05	▼ -9%

Source: Federal Reserve Board



## International Visitation



### UNITED KINGDOM Market Update

November 2021

#### ECONOMY

UK economy stalled in Q3 2021 due to COVID cases spiking in July and remaining high to-date. Despite the slowdown, many key indicators impacting outbound travel conditions are moving in the right direction.

(1) Consumer confidence improved in November. (2) Unemployment dropped to 4.3% in September and is forecast to have improved even further in October. (3) The pound continues to strengthen against the USD and was 8% higher in October than it was in 2019.

Rising inflation, however, is driving higher cost of travel, which could be a barrier for Orlando.

#### TRAVEL

Covid cases continue to be very high in the UK after the spike in July. After lifting all Covid restrictions within the country during the summer, mask mandates for indoors have been reintroduced with the threat of the new omicron variant.

A vast majority of the UK population ages 12+ (81%) have been fully vaccinated. A third have even received a booster or third dose.

Arrivals to the U.S. have been limited over the course of 2021 as the U.S. border had been closed for overseas travel until November 8, 2021.

Direct seats to Orlando have been virtually zero for the year but have begun to come back slowly in Q4 2021. Airlines appear more optimistic for next year as Q1 2022 shows a solid increase in seat capacity.

According to OTA Insight, UK accounts for 32% of all flight searches for Orlando globally. Unfortunately, their share of hotel searches is only 4%.

#### Direct Seats to Select U.S. Destinations % Change Year over Year

Destination	2021 v 2019 Q4 % change	2022 v 2019 Q1 % change
Orlando (MCO/MLB)	▼ -71%	▼ -31%
Las Vegas	▼ -71%	▼ -43%
Los Angeles	▼ -52%	▼ -45%
Miami	▼ -48%	▼ -34%
New York	▼ -49%	▼ -31%

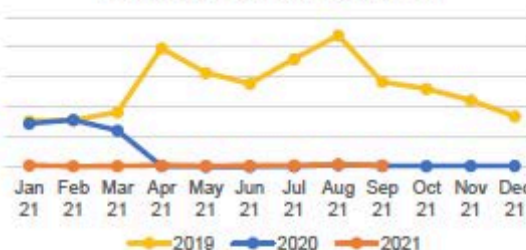
#### Passenger Arrivals to Select U.S. Destinations % Change from 2019

Destination	Arrivals YoY Sep 2021	Arrivals YTD Sep 2021
Orlando	▼ -98%	▼ -99%
Las Vegas	▼ -95%	▼ -97%
Los Angeles	▼ -84%	▼ -91%
Miami	▼ -90%	▼ -93%
New York	▼ -87%	▼ -95%

#### Advance Hotel Bookings: UK to Orlando



#### Monthly Air Arrivals to Orlando



Source: TravelClick

#### Arrivals to the U.S.

September 2021	Volume	% chg from 2019
Monthly	13,993	▼ -97%
YTD	94,490	▼ -97%

Source: NTD, COR Report

Source: Diio Mi

#### Monthly Exchange Rate

	USD per GBP	% chg from Prior Year
Oct-21	1.37	↑ 6%
Oct-20	1.30	↑ 3%

Source: Federal Reserve Board



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**Market**  
by Segment





## Direct Website / Reservations Call Center

Our direct website and direct marketing continue to be an asset to us. We continue to provide weekly emails with our current marketing messaging to include specials, promotions and offers. We utilize the latest email marketing strategy to target and ensure a strong open rate of the marketing emails. Additionally, we offer a monthly e-newsletter with information on the theme parks and special events around Orlando as another opportunity to stay in touch with our valuable guests.

By continuing with our Book Direct message, we can continue to see strong conversion rates on our direct website and increased traffic YOY to the website. Additionally, our strategy to provide the lowest promotional rate directly on our own website continues to benefit us within Google searches. We are continually optimizing the website for Google and we have increased our digital marketing and retargeting marketing to drive the direct bookings.

The hotel reservations team continues to assist all inbound callers with a friendly voice and helpful information. These agents are empowered to provide online rate matching to convert any guest calling with questions or for additional information into a directly booked guest to maximize revenues.







## Airbnb

As Airbnb continues to advance its technology platform and grow it has become an indisputable leader in the vacation rental platform and has become a key player of room night business into Orlando. We too have developed our own unique techniques that enhance the positioning of our hotel and available accommodations through this platform.

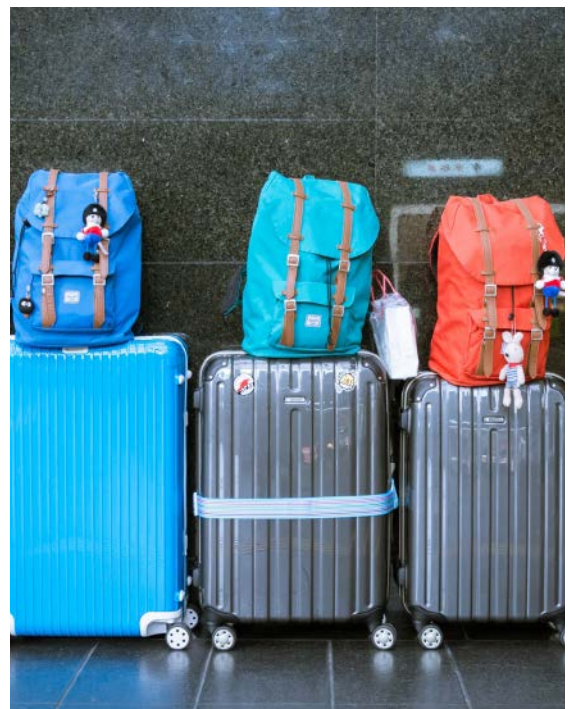
In Orlando, Airbnb inventory of short-term rental accommodations such as villas, condos and homes directly compete with the Enclave's studio and two-bedroom unit types. Our sales and marketing team have been quite successful with our own direct listings for the hotel through this online portal. We are pleased to share that we have been successful at creating listings that offer enhanced opportunities to compete within the Orlando hotel and vacation rental market on Airbnb.

Our success has placed our listings in the Top 25 of all Airbnb hosts in Orlando. As we continue to work and grow with this ever-changing and dynamic channel of business, we are confident it will yield increased revenue opportunities throughout 2022 and beyond.

## Online Travel Agency (OTAs)

As international travel continues to be reduced due to testing protocols or guests' unwillingness to travel overseas, we continue to rely on domestic travel and have been working very closely with our online travel agency partners (OTA's) to fill rooms. While OTA's have faced the same unprecedented hardships as the rest of the travel industry, this sector is faring better than other travel sectors, largely as a result of its flexible pricing structure and ease of adapting to guest needs.

We work closely with all our OTA partners by offering discounts and promotions and updating our content continually to provide the most up to date information for the travelers who utilize these platforms for their travel itineraries. We are seeing increased demand throughout 2022 and expect to continue to see this growth in the future.



### International Wholesale

As we move into 2022, we continue to benefit from our strong relationships with our international tour operator partners. We continue to contract and work directly with the largest tour operators to provide room nights and revenue to the property. Industry executives are predicting international travel will reach 90 percent of its pre-pandemic level now that the United Kingdom has relaxed some of its COVID-19 restrictions. Fully vaccinated travelers and children under the age of 18 no longer must take a pre-departure COVID test when they come back to the U.K. The advance booking for fall/winter 2022 and into 2023 look promising.

### Direct Seat Capacity to MCO/SFB

Seat Capacity Update as of 01/24/2022

International seat capacity is still struggling with Canada and the UK lagging 2019's capacity by -43% and -34% respectively in Q1 2022. Brazil's capacity is still heavily reduced through the first quarter of 2022, but Mexico and Colombia are expected to continue to outpace 2019 in Q1 2022.

#### International Seats: vs. 2019 (pre-pandemic)

Percent change in direct seat capacity for top origin destinations from same month in 2019.

Country	Jan-22	Feb-22	Mar-22	Apr-22	May-22
Brazil	-77%	-83%	-79%	-70%	-61%
Canada	-50%	-50%	-28%	-21%	1%
UK	-31%	-34%	-38%	-45%	-37%
Mexico	-4%	-6%	13%	27%	41%
Colombia	30%	-4%	3%	27%	26%
<b>Total International</b>	<b>-32%</b>	<b>-36%</b>	<b>-27%</b>	<b>-22%</b>	<b>-14%</b>



## International Wholesale

### International Travel Market Update

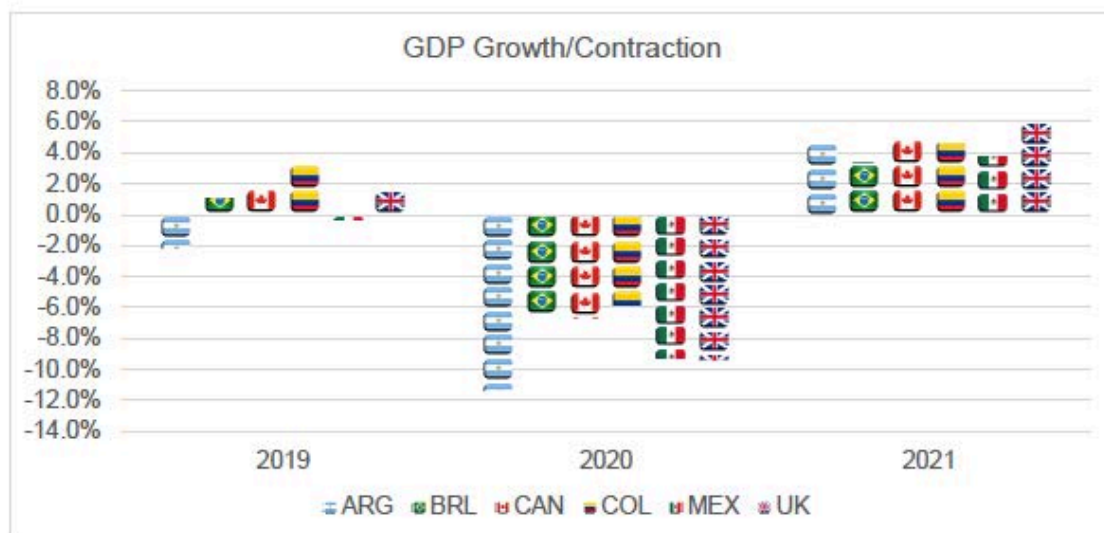
November 2020

This update provides a most current assessment of select key international markets to Orlando:



### Economic Overview

Just as in case with the U.S., all key international origin markets will experience recession during 2020 with a relatively subdued rebound in 2021. While some countries have begun to open their borders, a second wave of the virus is maintaining pressure on the economies and could be keeping most travelers at home through early 2021.



Source: FocusEconomics, Nov. 2020



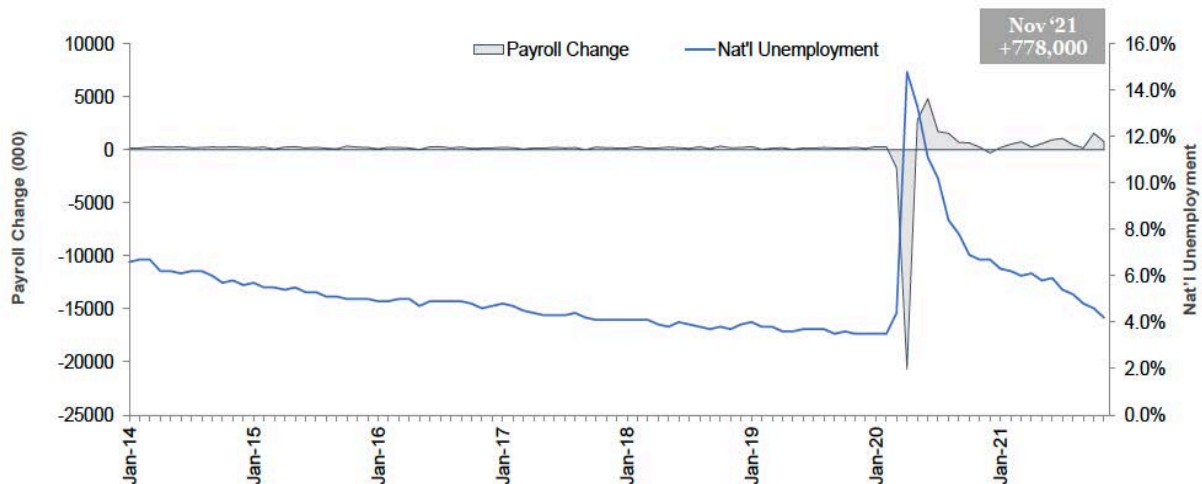


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**Latest  
Research**

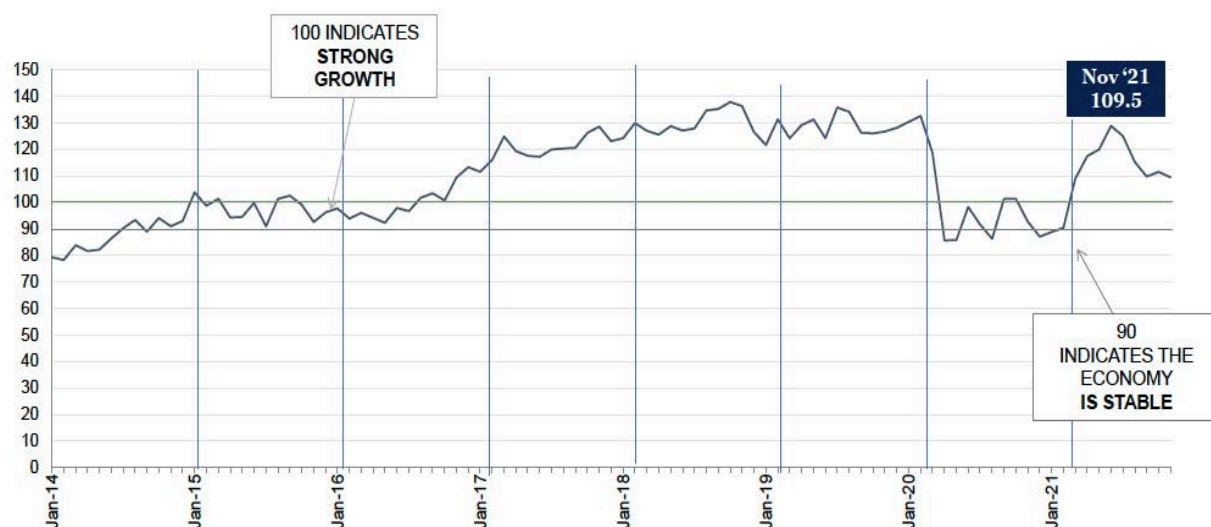
## Economic Indicators

### U.S. LABOR MARKET



Source: Bureau of Labor Statistics

### CONSUMER CONFIDENCE INDEX

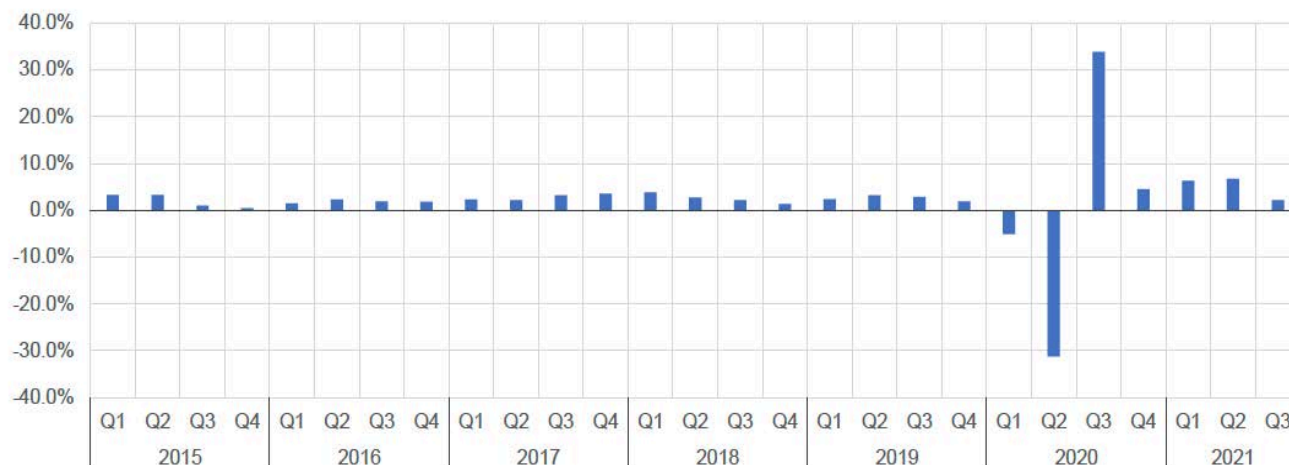


Source: The Conference Board



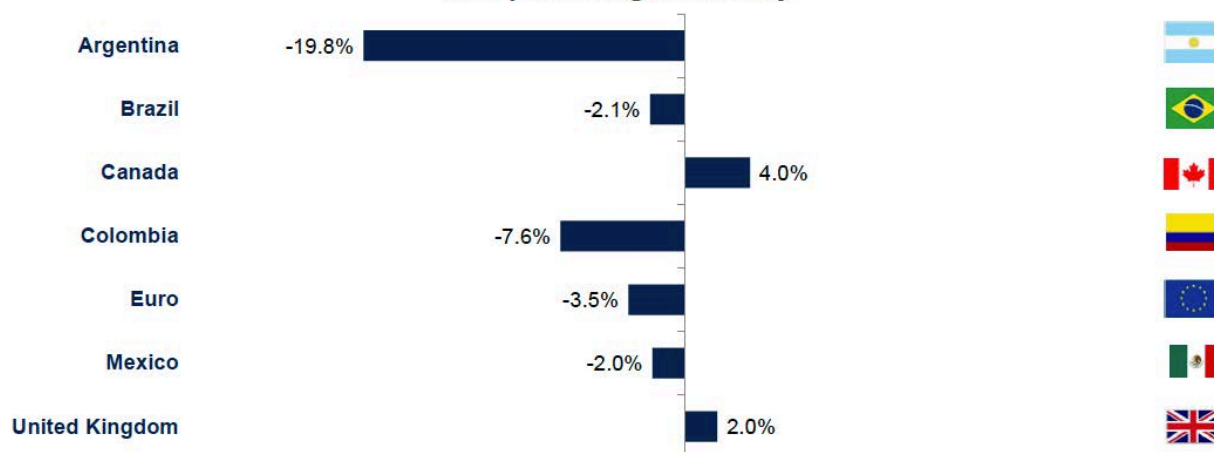
## Economic Indicators

### U.S. REAL GDP GROWTH RATE



### EXCHANGE RATES: % CHANGE YOY

November 2021 vs November 2020  
USD per Foreign Currency



Source: Federal Reserve Board; Oanda.com

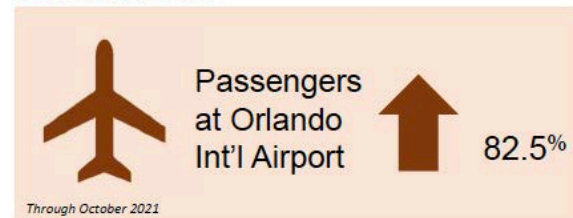
## Passenger Traffic

### 2021 YTD RESULTS vs. Prior Year

#### LODGING



#### AIR TRAFFIC



#### TAX REVENUE



#### CONVENTIONS

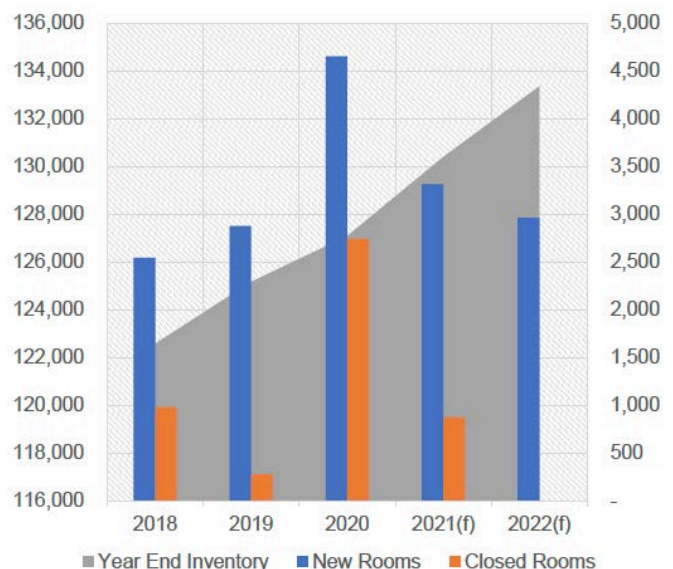


State of the Market Report: December 2021

## HOTEL SUPPLY

- 2019 Year End: 125,167
- 2020 Year End: 127,080
- 2021 adding 3,314 rooms
- 2022 adding 2,960 rooms

Anticipate ending 2022 with approx. 133,000 rooms

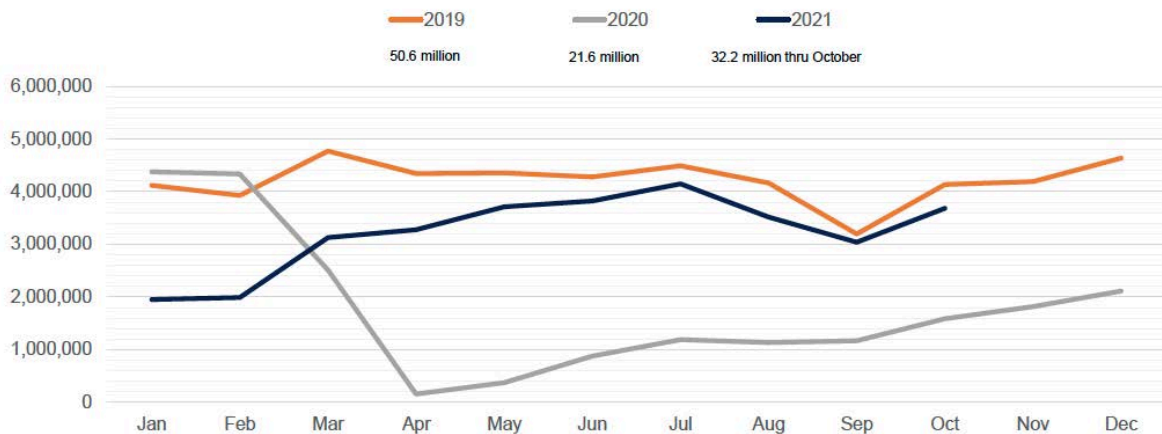


State of the Market Report: December 2021

## Passenger Traffic

### ORLANDO INTERNATIONAL AIRPORT

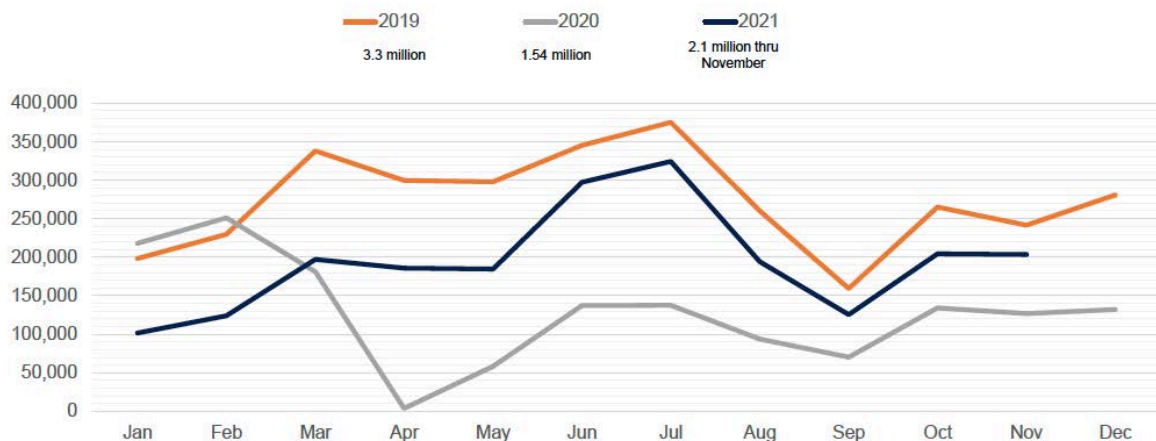
Passenger Traffic: Domestic and International Combined



Source: Greater Orlando Aviation Authority

### ORLANDO-SANFORD INTERNATIONAL AIRPORT

Passenger Traffic: Domestic and International Combined

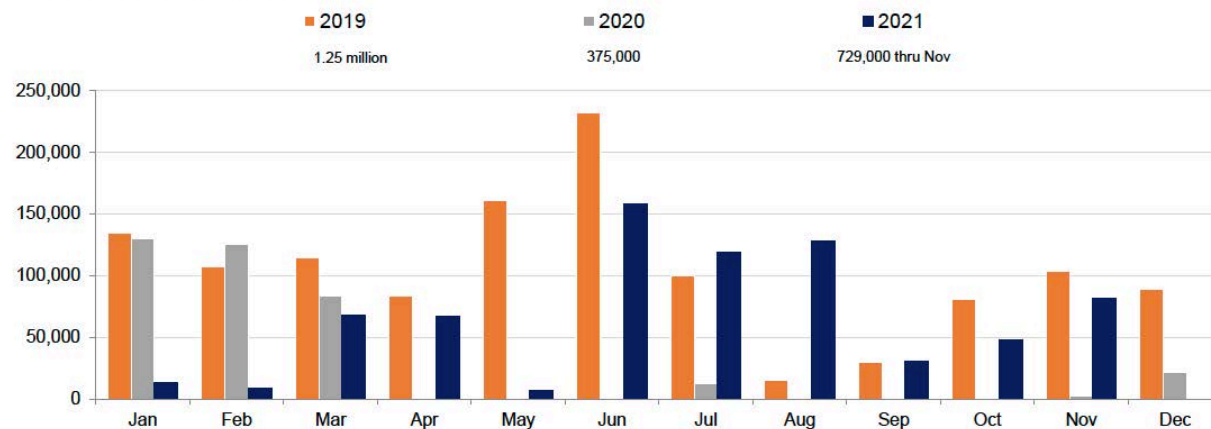


Source: Sanford Aviation Authority

## Passenger Traffic

### ORANGE COUNTY CONVENTION CENTER

Citywide Event Attendance



Source: Orange County Convention Center



## Visitor Forecast

### ECONOMIC FORECAST

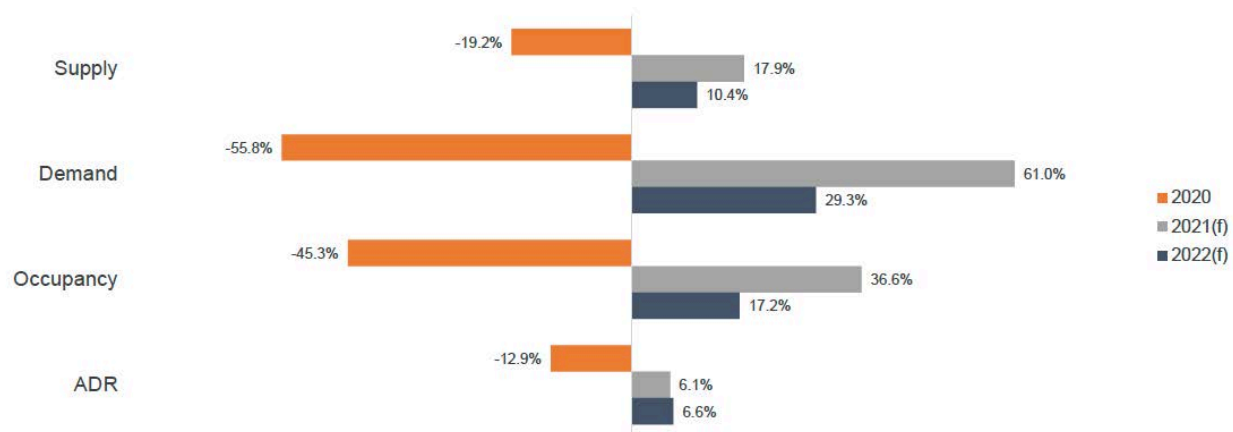
The economic forecast is based on a survey of 36 professional forecasters conducted by the Federal Reserve Bank of Philadelphia.

2021 Q4 Survey of Professional Forecasters	2021	2022
Gross Domestic Product (growth rate)	5.5%	3.9%
Unemployment	5.4%	4.1%
Headline Inflation	5.8%	2.7%
Core Inflation (excl. food & energy)	4.5%	2.6%

Source: Survey of Professional Forecasters, Federal Reserve Bank of Philadelphia

### METRO ORLANDO LODGING FORECAST

YoY % Change

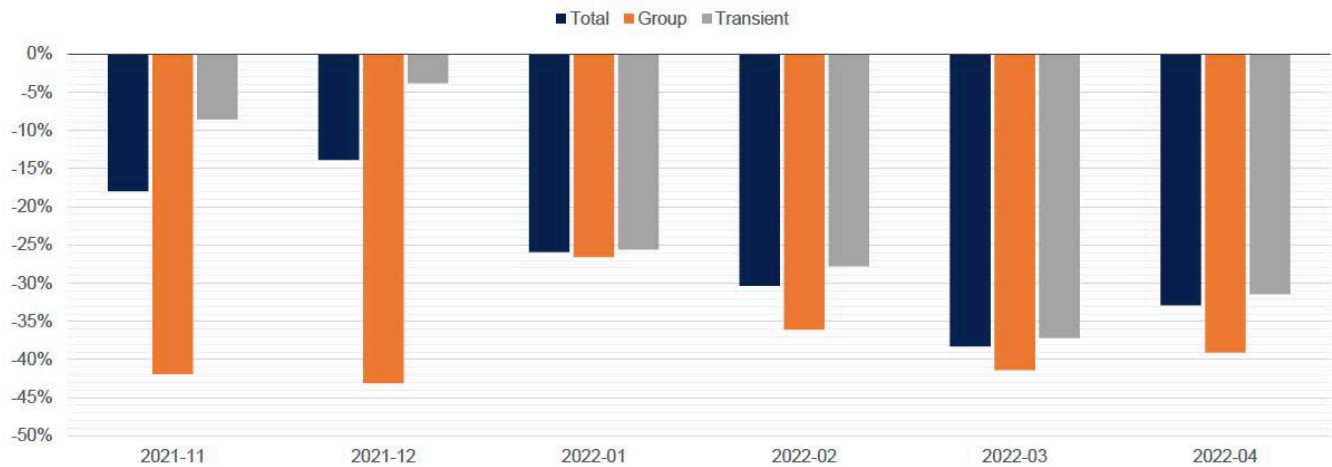


Source: STR, November 2021

State of the Market Report: December 2021

Visitor Forecast

CURRENT ORLANDO AREA HOTEL BOOKING PACE  
Percent change from same time in 2019 as of December 17, 2021 report



State of the Market Report: December 2021



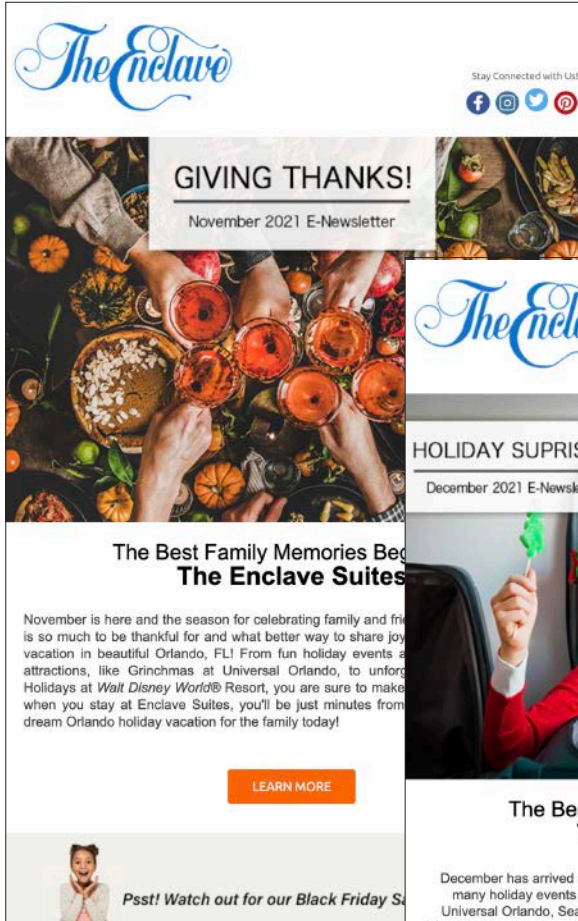
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**Exhibits**



## Monthly E-Newsletter Sampling

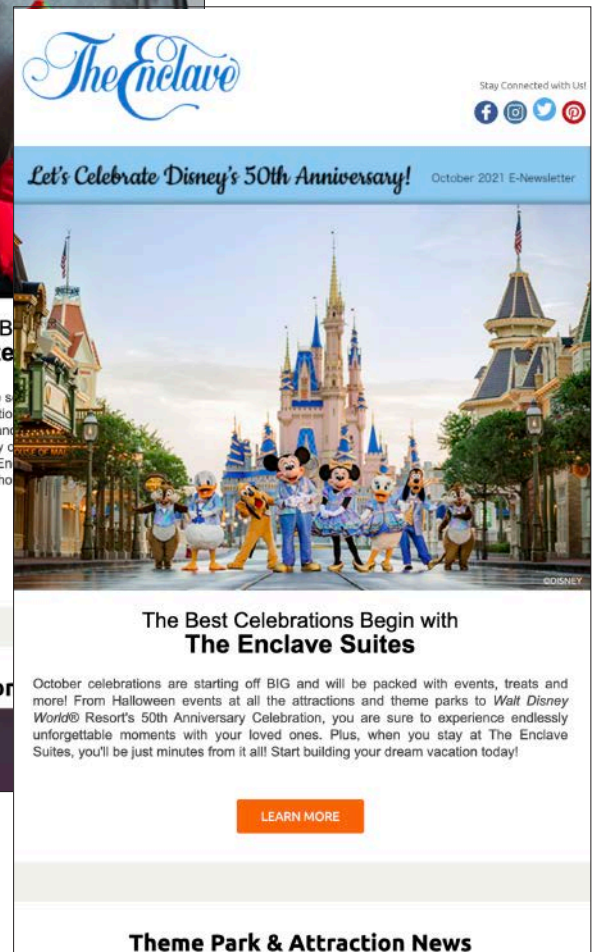
Top E-Newsletters for 2021



November E-Newsletter  
11/1/2021



December E-Newsletter  
12/1/2021



October E-Newsletter  
10/1/2021



### Email Marketing

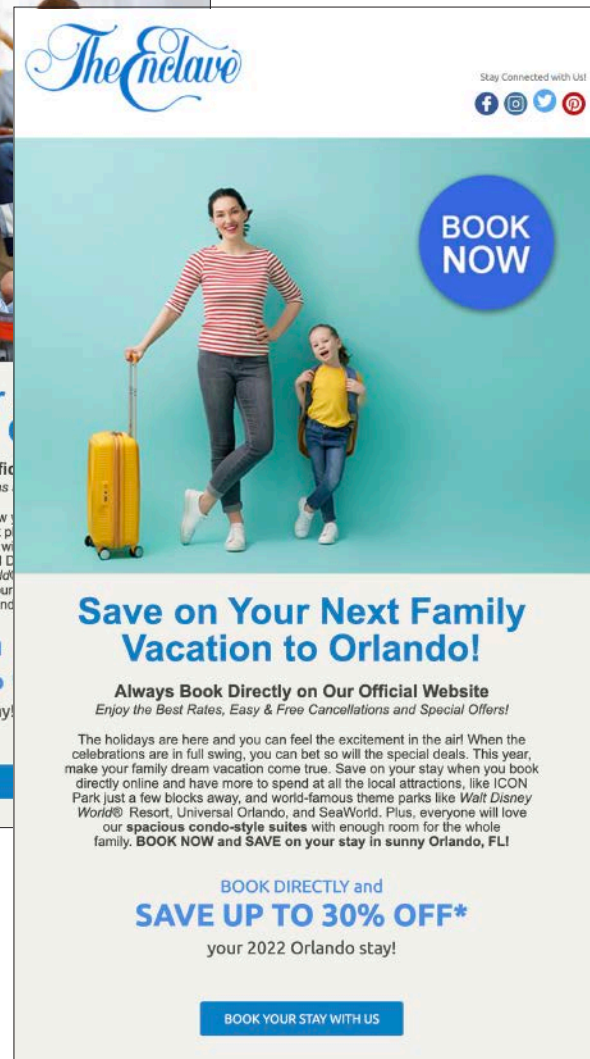
Top Emails for 2021



Disney Anniversary  
10/5/2021



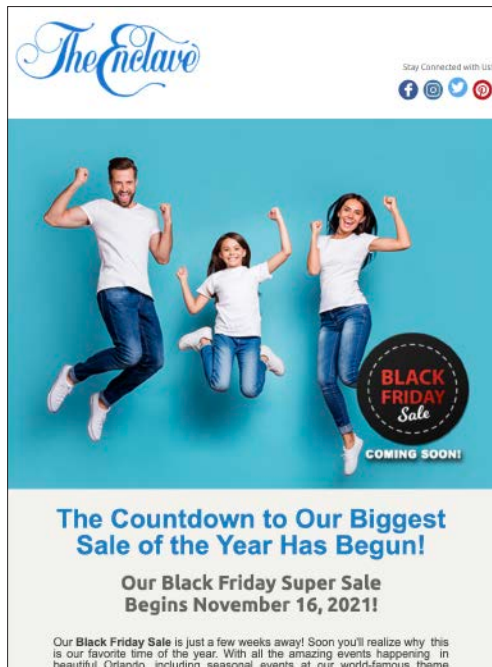
Travel in 2022  
12/28/2021



Family Celebrations  
12/14/2021

## Email Marketing

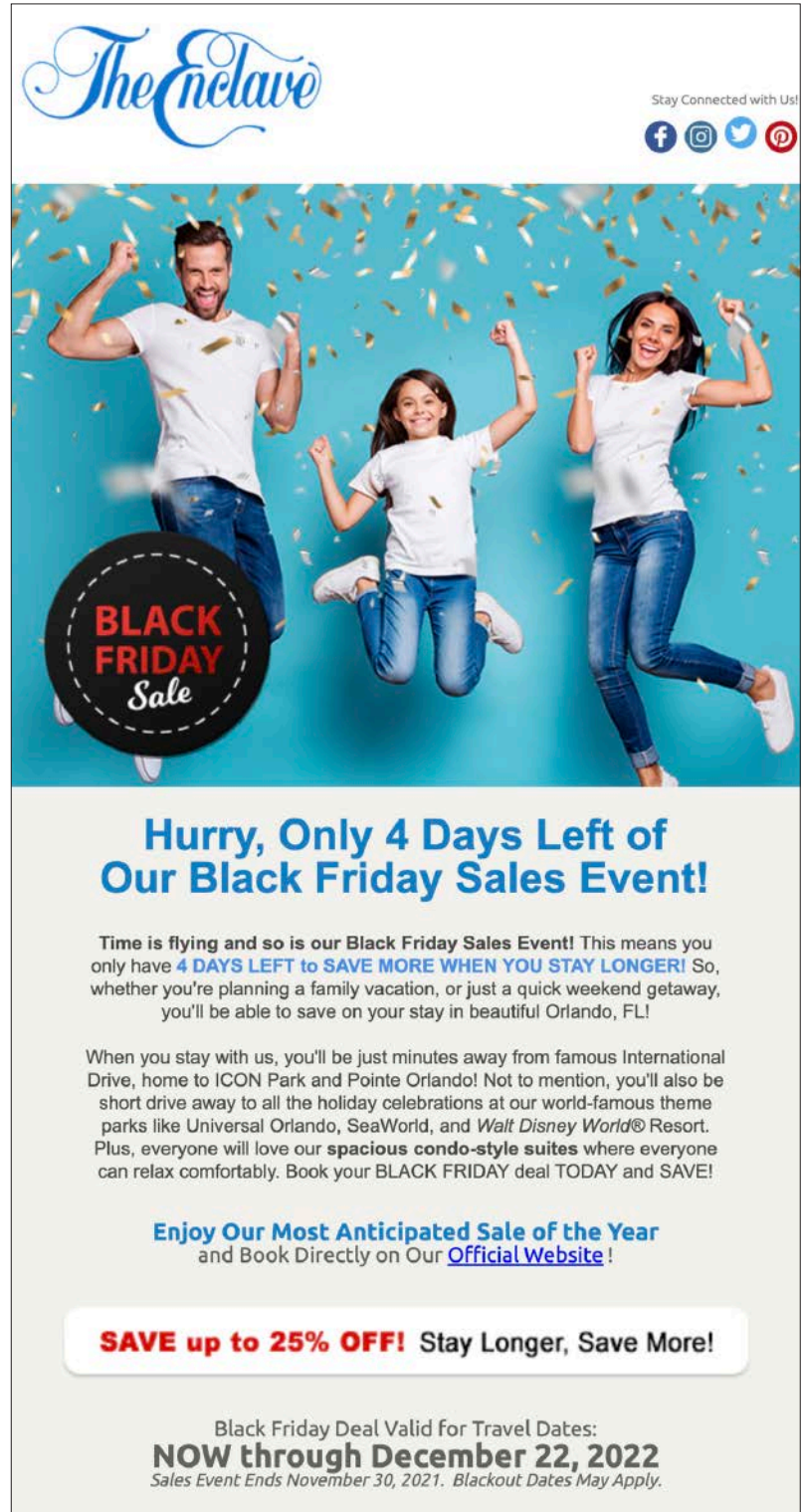
### Black Friday Campaign Samples



Black Friday Coming Soon - 11/2/21



Black Friday Begins Today - 11/16/21



Hurry, Only 4 Days Left - 11/26/21



## Email Marketing

Cyber Monday / Travel Tuesday Samples



**The Enclave**

Stay Connected

**CYBER MONDAY SALE!**  
CELEBRATING FAMILY VACATIONS

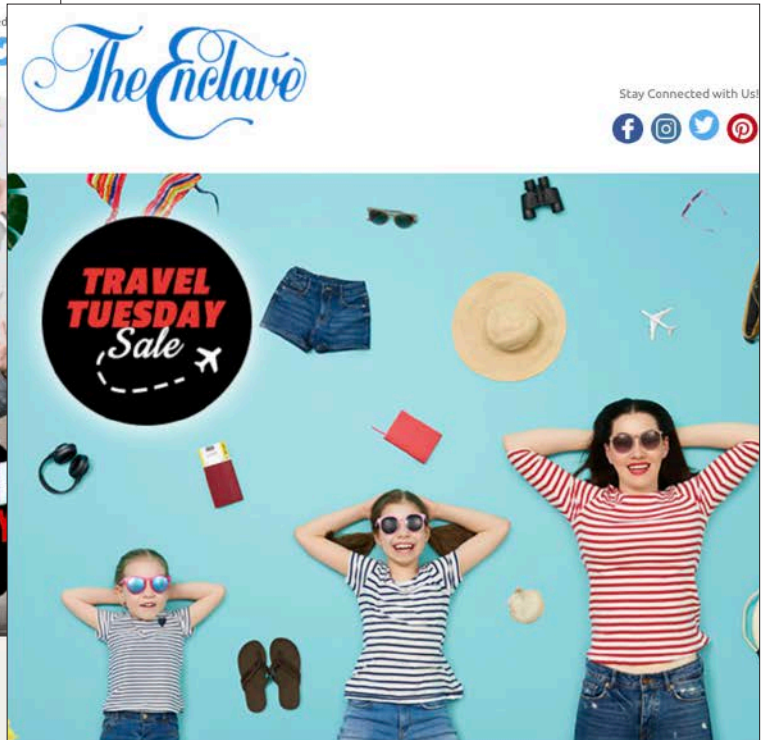
Let the most anticipated sale of the year continue! We've pulled out all the stops to create the **best deals** this year. So, when you **stay longer, you save more!** This means no matter what type of vacation you're planning, you're sure to enjoy a great deal! When you stay with us, you'll be just minutes from all the highly anticipated holiday events at our local attractions on International Drive like ICON Park, as well as world-famous theme parks like *Walt Disney World*® Resort, Universal Orlando and SeaWorld. Not to mention, everyone will love our **spacious condo-style suites** where everyone can relax comfortably. **BOOK NOW** and **SAVE** on Your Stay in Orlando, FL!

Enjoy Our Most Anticipated Sale of the Year  
and Book Directly on Our [Official Website](#)!

**SAVE up to 25% OFF!** Stay Longer, Save More!

Black Friday Deal Valid for Travel Dates:  
**NOW through December 22, 2022**  
Sales Event Ends November 30, 2021. Blackout Dates May Apply.

Cyber Monday Begins - 11/29/21



**The Enclave**

Stay Connected with Us!

**TRAVEL TUESDAY SALE!**  
LET'S GET READY TO VACATION

Today is the **LAST DAY** of our **BLACK FRIDAY SALE** and we're celebrating **TRAVEL TUESDAY!** As traveling slowly picks up and families are planning more vacations, we want to make sure you have the **best deals** where you can **save more** when you **stay longer!**

When you stay with us, you'll be just minutes from all the holiday events at our local attractions on International Drive, like ICON Park, as well as our world-famous theme parks like *Walt Disney World*® Resort, Universal Orlando and SeaWorld. Not to mention, everyone will love our **spacious condo-style suites**. **BOOK NOW** and **SAVE** on Your Stay in Orlando, FL!

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It's Travel Tuesday - 11/30/21



## Email Marketing

*Happy Holidays 2021*



Happy Thanksgiving  
11/25/21



Merry Christmas  
12/24/21



Happy New Year  
12/31/21

### Trade Manual

Resort Facts Sheet - 2021

## The Enclave Suites

FAMILY RESORT



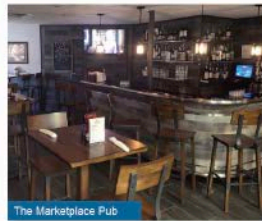
Located just off famous International Drive, The Enclave Suites offers exceptional amenities and value, making it one of Orlando's most popular full-service resort hotels.

- FREE Self Parking
- FREE WIFI
- Close to all the fun of International Drive
- Minutes to the Theme Parks
- 2 Oversized Outdoor Pools
- 2 Kiddie Pools
- 2 Whirlpools
- Indoor Heated Pool and Jacuzzi



### HOTEL HIGHLIGHTS

- Deluxe Studio or Two Bedroom/Two Bathroom Suites with Fully Equipped Kitchenette and Private Balcony
- 2 Outdoor Pools, 1 Indoor Heated Pool
- 3 Jacuzzis - 2 Outdoor, 1 Indoor
- The Marketplace (Food Court)
- The Marketplace Pub
- The Marketplace Store
- Floodlit Tennis Court
- 24 Hour Fitness Room
- Kids' Club (seasonal)
- Laundry Room - Self Service, Coin Operated
- ATM Machine
- Business Center
- Complimentary WIFI
- Complimentary Parking



The Marketplace Pub

#### Shopping

- Lake Buena Vista Factory Stores - 8.8 miles
- Premium Outlets - 2 miles
- Disney Springs - 8 miles
- Florida Mall - 5 miles
- Mall at Millenia - 5 miles

#### Nearby Attractions

- Disney Theme Parks - 8 miles
- SeaWorld & Aquatica - 4.5 miles
- Universal Orlando - 1.5 miles
- ICON Park - 1 mile

#### Golf

- Shingle Creek Golf Club - 3.6 miles
- Hawk's Landing Golf Club - 8.7 miles
- Falcon's Fire Golf Course - 12 miles
- Disney's Lake Buena Vista Golf Course - 8 miles



The Marketplace



The Marketplace Store



Kids' Club

### DINING OPTIONS

- The Marketplace Food Court
- The Marketplace Pub
- Many Dining Options Within Walking Distance



Front

### CONTACT

The Enclave Suites

6165 Carner Dr. Orlando, Florida 32819

Tel: 407-351-1155

Reservations Toll-Free: 800-457-0077

Email: [reservations@enclavesuites.com](mailto:reservations@enclavesuites.com)  
[enclavesuites.com](http://enclavesuites.com)



- Number of Rooms - 321
- Check-In Time - 4pm
- Check-Out Time - 11am
- Buildings - 3
- Floors Per Building - 10
- Elevators - 6



Two Bedroom Suite Living Room



Two Bedroom Suite Master Bedroom

#### Studio Suite

- One Queen Bed
- Full Size Sofa Bed
- Cable, Remote Television
- Clock Radio & Safe
- Iron, Ironing Board & Hair Dryer
- Private Bathroom
- Balcony
- Fully Equipped Kitchenette
- Sleeps Max. 3 Adults or 2 Adults & 2 Children



#### Two Bedroom Suite

- Master Bedroom - One Queen Bed
- Second Bedroom - Two Twin Beds
- Living Room with Full Size Sofa Bed
- Dining Table with Four Chairs
- TV in each room
- Clock Radio & Safe
- Iron, Ironing Board & Hair Dryer
- Two Private Bathrooms
- Balcony
- Fully Equipped Kitchenette
- Sleeps Max. 5 Adults or 4 Adults & 2 Children



#### Housekeeping

As an environmentally conscious organization, and recipient of the Travel Life Gold Award for Sustainability in Tourism, the Enclave Suites prides itself as being an Eco-friendly resort. One highlight of our program is the reduction in the use of chemicals and detergents by providing housekeeping services every 4th day on request.

Back



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[EnclaveSuites.com](http://EnclaveSuites.com)







*The Enclave*

## The Enclave Suites

6165 Carrier Drive  
Orlando, FL 32819  
T: (407) 351-1155  
EnclaveSuites.com

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