



Orlando: The 97 Nights

Orlando Becomes a Convention City

One convention ecosystem – Two powerful models.

- Citywide model (OCCC, Hyatt, Hilton & Rosen) & Campus model (Seven Controlled Experiences)
- 97 dates in 2027 tell you when to compete for it.

97

Premium group nights (2027)

6.5M

Citywide business travelers

1.8M

OCCC attendees (2027 booked)

4.7M

Outside the OCCC walls

WHERE THE NUMBERS COME FROM

42

CONVENTION HOTELS

300+ rooms, 36,074 rooms total (57%).
Disney & Universal excluded. CoStar core
convention set.

Convention hotel set includes: Orlando World Center Marriott (2,010 rms) • Swan & Dolphin combined (2,270) • Gaylord Palms (1,718) • Hyatt Regency Orlando (1,641) • JW Marriott + Ritz-Carlton Grande Lakes combined (1,592) • Rosen Shingle Creek (1,501) • Hilton Orlando (1,424) • Caribe Royale (1,337) • Rosen Centre (1,334) • Hilton Buena Vista Palace (1,011)

123

OCCC EVENTS BOOKED

1.82M attendees on the 2027 OCCC
reservation system. Anchored by AAU,
MegaCon, IAAPA, The Open, Plastics, PGA
Show.

97

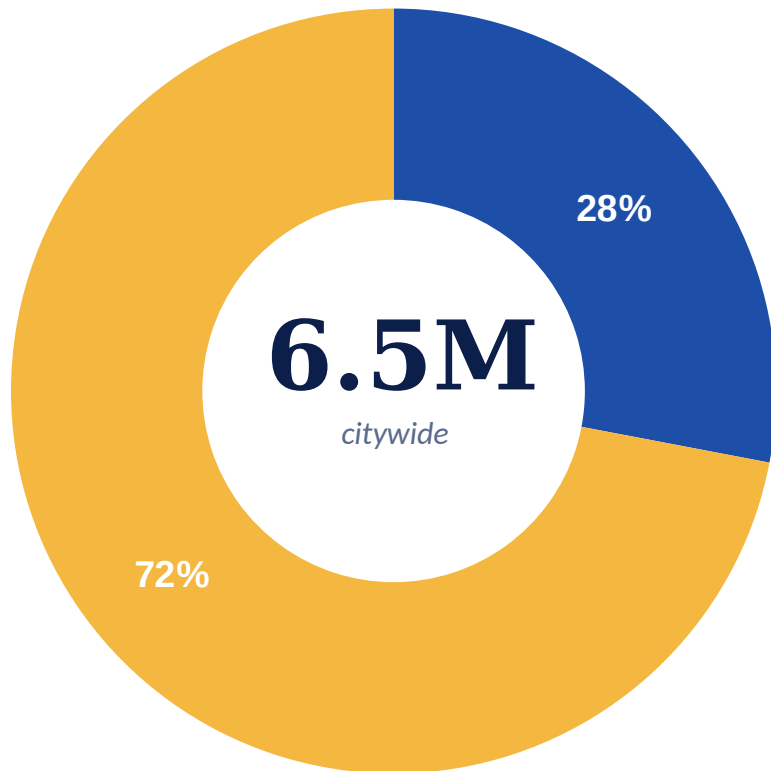
DATES > 65% GROUP (Avg. 77%)

Orlando Convention group bookings rolling
avg, projecting 97 dates in 2027.



OCCC Is 1 of Every 4

OCCC will host 1.82M attendees in 2027. Orlando welcomes 6.5M business travelers a year. The gap - 4.68M In-House meeting attendees at Campus Model Convention Resorts.



■ OCCC (1.82M) ■ Outside OCCC (4.68M)



ORLANDO BUSINESS TRAVEL GROWTH

2005 vs 2015 vs 2025

Metric	2005	2015	2025
Total Orlando visitors	~48 million	~66 million	~75.3 million
Business / convention travelers (est.)	~3–3.5 million	~4.5–5 million	~6–7 million
Convention Center attendance	~1.1 million	~1.4 million	~1.74 million
Orlando International Airport passengers	34.1M	38.7M	~57.6M
Hotel rooms in destination	~105k	~115k	~130k
Visitor economy impact	~\$31B	~\$55B	~\$94B

Sources: Visit Orlando tourism reports · OCCC attendance data · MCO airport traffic statistics

28%

is what OCCC captures

1.82M of the 6.5M citywide business travelers walk through OCCC doors in 2027. The rest don't.

72%

meets elsewhere

4.68M business travelers are conducting meetings at convention hotels, sports complexes, and training centers - not OCCC.

97

nights, mostly off-OCCC

The 97 group-dominant nights live across Disney-Area Hotels, Universal, Marriott, Hyatt, Hilton, Rosen, Gaylord Palms.

WHERE THE NUMBER COMES FROM

- 42 Orlando Area Convention Hotels ranked every 2027 calendar date by projected group share, using a rolling 3-year actual.
- The 97 Green dates listed are the ones where group bookings exceed 65% - a true convention night.

86% of the highest group occupancy dates fall on Mon., Tue., or Wed.





You Opportunity

Convention Compression. Ecosystem Alignment. Incremental Revenue.

What's important?
Why's it matter?
Who's it impact?
How's it measured?

Now next steps...

How are you currently evaluating & coaching your Sales team today?

Where's your biggest drop-off or pain point?

If you were to solve that today, what changes?

Mon.-Thur. Group Sales
XX% of all bookings

\$XM Revenue
\$XM in EBITDA

**Zer0 Additional
Impact**

Sell XX Groups
\$XXK Avg. Sale, XX Avg. Group Size

**Fill Underutilized
Nights**



CENTRAL FLORIDA CONVENTION ECOSYSTEM EXPANSIONS

2010-2027 | CAPACITY · CONNECTIVITY · EXPERIENCE

ORANGE COUNTY CONVENTION CENTER (OCCC)

EXPANSION & EVOLUTION TIMELINE



North / South Building

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ORLANDO CONVENTION JOURNEY AT A GLANCE

- 1983 OPENS**
Phase I opens Feb 1983
- 2003 2M+ SF**
South Bldg (Phase V) complete – OCCC surpasses 2M+ SF
- 2010 1M EXPANSION**
Fully integrated – Operational dominance achieved
- 2021 MAJOR HOTEL EXPANSIONS**
Gaylord + Swan Reserve add significant space
- 2025-26+ NEXT WAVE**
OCCC Phase 5A under construction. Future Phase 5B proposed

~2.1M+ SF
TOTAL OCCC SPACE
Today (2024)

MULTIPLE EVENTS
SIMULTANEOUSLY
Citywide scale · Campus flexibility

WALKABLE · CONNECTED
COMPLETE ECOSYSTEM
Convention Center + Hotels = One Product

ONE CONNECTED ENVIRONMENT
INTEGRATED RESORT ECOSYSTEMS
Positioned for next generation of Orlando Meetings & Events

GAYLORD PALMS

Resort & Convention Center
Kissimmee



2021 EXPANSION

- +100,000 SF meeting space
- Total ~500,000+ SF

IMPACT:

Standalone convention competitor

WALT DISNEY WORLD

Swan & Dolphin
Lake Buena Vista



2021 EXPANSION

(Swan Reserve Addition)

- +149,000 SF meeting space
- Total ~2,270 rooms combined

IMPACT:

Closed-campus Disney convention ecosystem

ORLANDO WORLD CENTER

Marriott
Orlando



2006 MAJOR EXPANSION

(Ballroom Tower)

- Ongoing enhancements 2019-2023
- Total ~450,000+ SF

IMPACT:

One of world's largest Marriott convention hotels

CONRAD ORLANDO

at Evermore Resort
1,100-acre resort · Near Disney



2024 GRAND OPENING

(New-build luxury debut)

- ~65,000 SF indoor & outdoor event space
 - 433 luxury rooms · 51 suites
- IMPACT:**
• Evermore: 150,000+ SF total event
New luxury resort campus for premium groups

SIGNIA BY HILTON

Orlando Bonnet Creek
Adjacent to Walt Disney World



2023 REBRAND & EXPANSION

- ~231,000 SF flexible meeting space
 - Connected to Waldorf Astoria (502 rms)
 - Bonnet Creek complex: ~300,000 SF
- IMPACT:**
Premier Disney-adjacent convention complex

JW MARRIOTT ORLANDO

Grande Lakes & Ritz-Carlton
Orlando, Grande Lakes



2023 EXPANSION

- Grande Lakes Convention Center
- ~100,000+ SF new meeting space

IMPACT:

Luxury convention campus for high-end events

UNIVERSAL ORLANDO RESORT

Loews Hotels Portfolio
Universal Drive



2016-PRESENT

Portfolio Growth

- Loews portfolio: Sapphire Falls, Portofino Bay, Hard Rock, Royal Pacific

IMPACT:

Distributed convention ecosystem for mid-size & premium groups

THE STRATEGIC EVOLUTION

2005 ORLANDO

Theme-park destination

- Association meetings
- Smaller corporate incentive

2015 ORLANDO

Convention infrastructure

- Large trade shows
- Corporate meetings growing

2025 ORLANDO

Global convention hub

- Mega corporate events
- Creator economy events
- Medical / tech / sports conventions

TWO POWERFUL MODELS · ONE DESTINATION

CITYWIDE

(open ecosystem)

OCCC + Hyatt + Hilton + Rosen
Scale · Flexibility · Walkability

VS

CAMPUS

(controlled)

Gaylord · Swan & Dolphin
World Center Marriott · Grande Lakes

THE BOTTOM LINE

Space + Hotels + Experience = Citywide Win Rate

In 2027, those wins concentrate into 97 high-value nights.
That's why Orlando wins.

THE STRATEGIC SHIFT
(2005-2027)

2005
SELL A CONVENTION CENTER

2015
SELL A DESTINATION

2025
SELL AN ECOSYSTEM

2027
OPTIMIZE AROUND THE 97 HIGHEST-VALUE NIGHTS

THE EXCLUSIVE EXECUTIVE INSIGHT

Orlando's Convention Economy

is a Monday-Wednesday business.

THE PROOF

The Campus Model Comp Set, all confirmed 75-82% of their group calendar concentrated in Mon/Tue/Wed. Multiple different datasets. Same story.

THE OPPORTUNITY

What are you doing differently now vs. 2015?
What's working well? What's not?
If you could improve one measurement, what would that be?

THE CONSEQUENCE

This concentration is the compression that drives premium ADR, citywide activity, and the opportunity for incremental event sales growth. Comp set hotels see a 40% lift in ADR on when securing weeknight groups.

THE BOTTOM LINE

Across the Campus-Model comp set, the data consistently shows Orlando's highest-value convention demand concentrates on Monday, Tuesday, and Wednesday. That concentration creates the compression that drives premium ADR, citywide activity, and incremental event sales growth.

THE TAKEAWAY

If you sell Orlando in 2027, *you have 97 nights to win.*

AND 2027 IS STILL BOOKING

97 is the floor, not the ceiling. New RFPs, citywides, and rotational events are still being awarded for 2027.

01

BUILD AROUND THE PEAK WINDOWS

57 of the 97 nights cluster into 4 windows: Winter Launch (Jan 17-Feb 4), Feb-Mar Peak (Feb 8-Mar 11), Spring Summit (May 3-27), Fall Finale (Oct 4-Nov 17). Sequence your outreach to land here.

02

OWN MON-TUE-WED

79% of premium nights fall on Mon/Tue/Wed. Build the off-site offer that wraps the midweek convention experience. Fri/Sat is leisure - different sale, different buyer.

03

SELL THE EXPERIENCE, NOT THE BALLROOM

The convention is no longer the product. Lead with Universal's IP, private buyouts, branded activations. The keynote moves to your park.

Appendix

References

[Visit Orlando](#)

[Orange County Convention Center | Orlando, Florida](#)

[Data and Trends](#)

[Orlando Florida Statistics | Data on the Orlando Region](#)

[Tourism Drives \\$94.5B Impact Across Central Florida](#)

[Orlando International Airport - Wikipedia](#)

[\\$94B economic impact generated by Central Florida tourism](#)

[More than 75 million people visited Orlando last year](#)

<u>Hotels</u>	<u>Category</u>	<u>Rooms</u>
#	Non Parks	300+
42	Convention	36074
43	Timeshare/Liesure	26863
85	Sub-Total	62937
304	Hotels under 300	40700
389	Sub-Total	103637
11	Universal	11000
21	Disney	24838
421	Total	139475

The Industry Agrees

Cvent's 2026 Top Meeting Destinations - North America. Built from \$20B in real RFP and sourcing activity across the world's largest planner network.

CVENT 2026 RANKING

#1

Orlando, FL

Top Meeting Destination, North America

11

CONSECUTIVE YEARS

at the top of the list

THE 2026 TOP 10

#1	Orlando, FL
#2	Las Vegas, NV
#3	Nashville, TN
#4	Chicago, IL
#5	Dallas, TX
#6	Atlanta, GA
#7	San Diego, CA
#8	New York, NY
#9	Austin, TX
#10	Washington, D.C.

\$20B in planner sourcing activity. 50 ranked North American markets. Orlando #1 every year since 2015. The 91 nights aren't a Universal opinion - they're what the global planner community is voting with their RFPs.

The 2027 OCCC Booked Calendar

123 booked events, 1.82M attendees. Here are the 15 biggest.

Date	Event	Attendees
Jun 13	AAU Junior National Volleyball Championships	325,000
May 20	MegaCon Orlando 2027	160,000
Apr 14	Allstar World Championships 2027	75,000
May 03	NPE 2027 (Plastics Industry)	56,000
Mar 19	Sunshine Volleyball Classic 2027	50,000
Jun 06	Premiere Orlando 2027 (Beauty Industry)	50,000
Dec 16	DreamHack 2027 (Esports)	45,000
Jun 16	InfoComm 2027 (Pro AV)	44,129
Nov 16	IAAPA Expo	41,100
Jan 27	PGA Show 2027	32,000
Dec 17	Holiday Matsuri 2027	30,000
Aug 02	Assemblies of God General Council	28,000
Apr 06	Coverings 2027 (Tile & Stone)	26,800
Nov 25	Central Florida International Auto Show	26,000
Jan 16	VMX (Veterinary Meeting & Expo)	25,000

Top 15 alone = 1,014,029 attendees. The other 108 OCCC events fill in around them. None of this counts the corporate meetings, training, and SMERF business living in the 3.6M citywide gap.

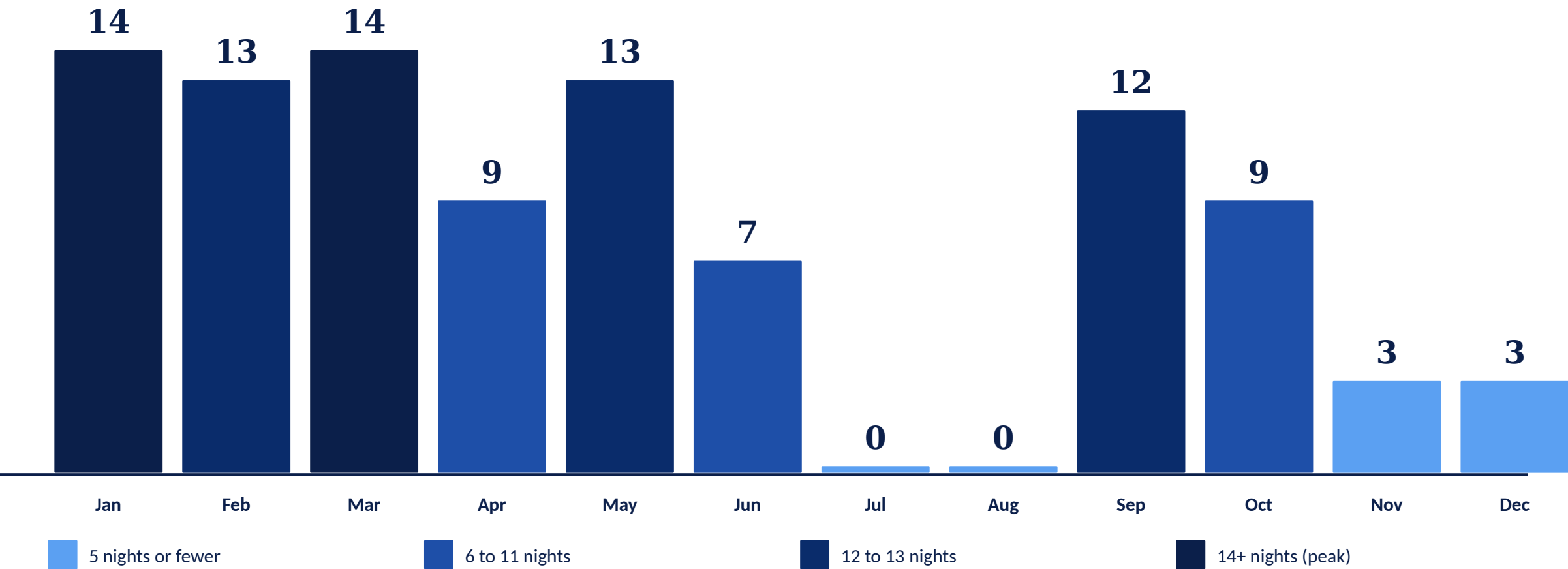
The Real Shift: Experience-Driven Business Travel

Why these 97 nights look nothing like the convention nights of 2005.



The 97 Nights, by Month

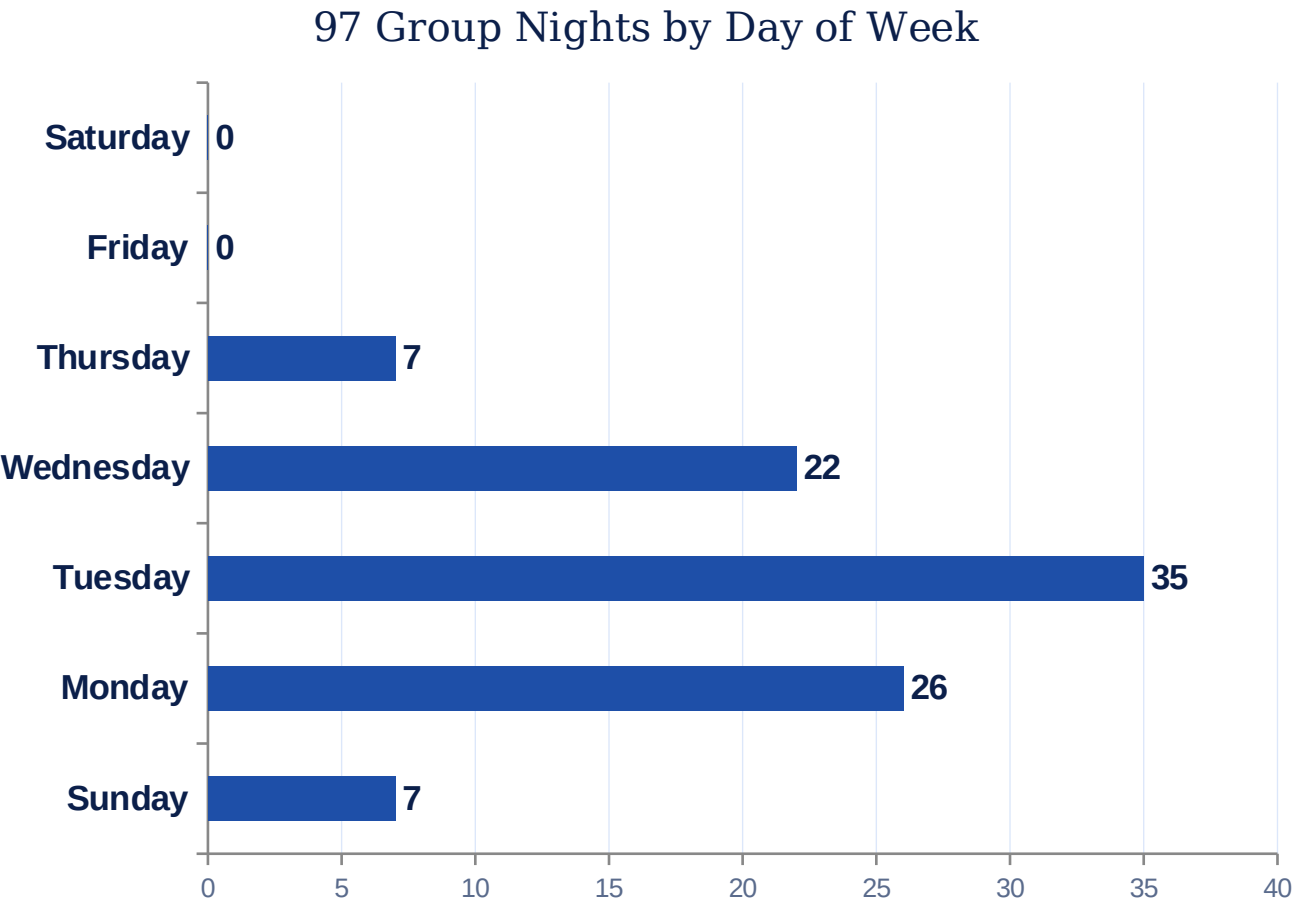
Jan and March tie at 14 nights each. Feb and May each at 13. Jul and Aug at zero – Other AAU Volleyball (6/13-7/7) the summer is light for group.



Four months over 12 nights: Jan (14), Mar (14), Feb (13), May (13). Q1 + May = 63 of 97. Jul + Aug = 0.

The Midweek Truth

Convention compression is a Monday-Tuesday-Wednesday phenomenon. Weekends barely qualify.



83 of 97

land on Mon-Tue-Wed

That is 86% of the entire premium group calendar concentrated in 3 weekdays.

0 of 97

land on a Friday

Zero Fridays qualify. Conventions break Thursday afternoon and ADR collapses into the weekend.

0 Saturdays

qualify

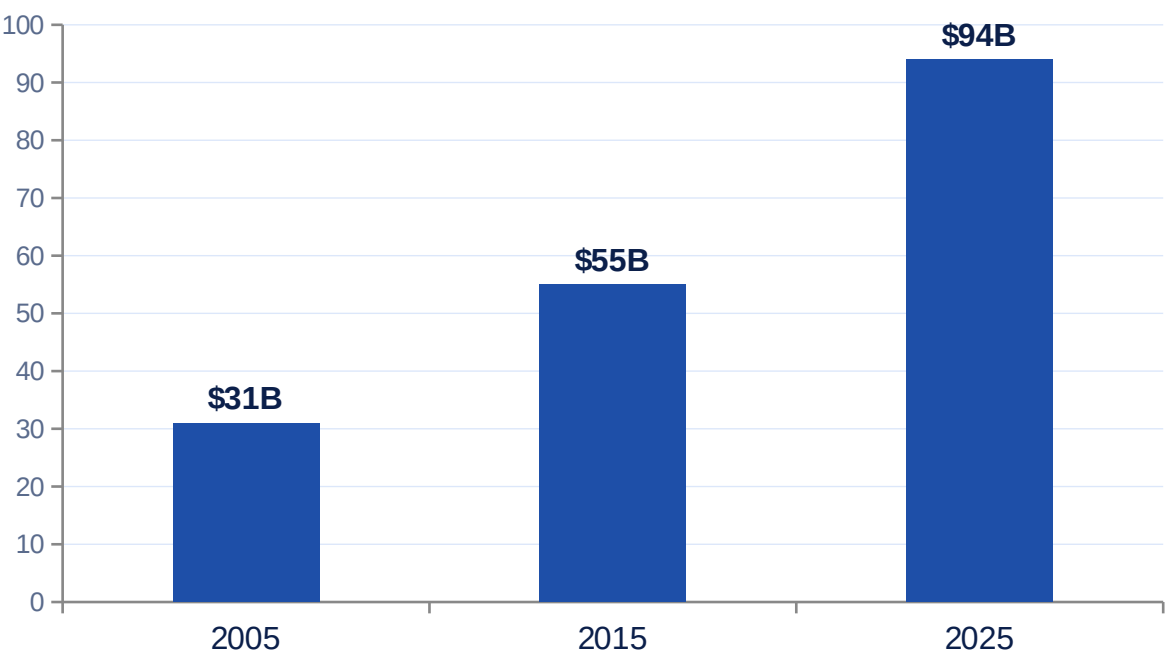
Saturday is a pure leisure night in Orlando, even in convention months.

The 20-Year Runway

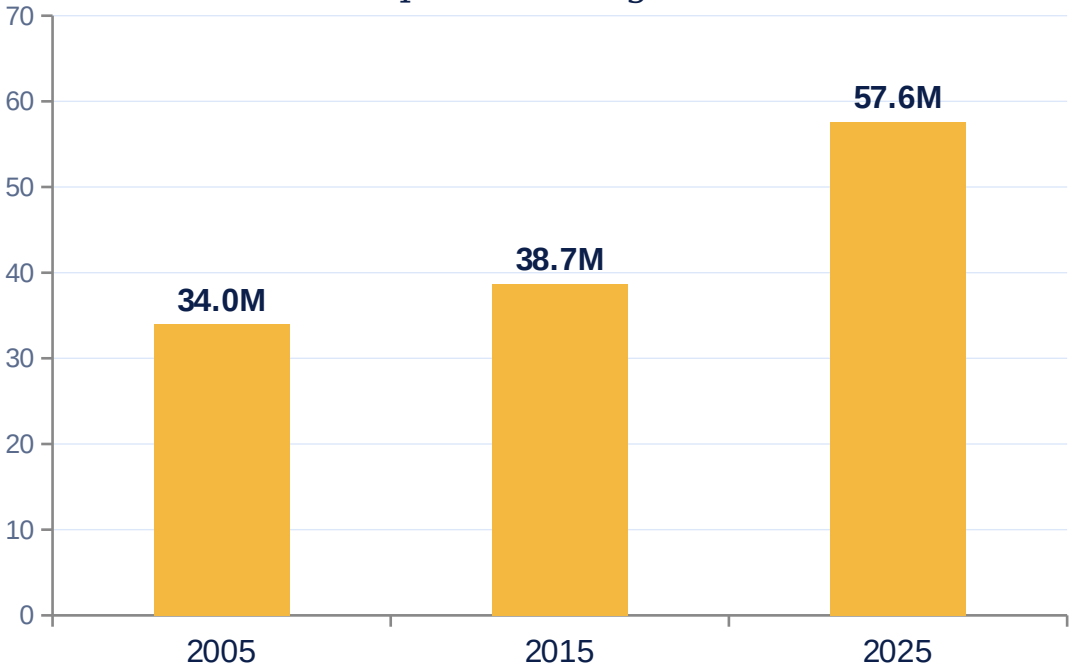
Why 97 group-dominant nights in 2027 is the natural endpoint of two decades of infrastructure build.

\$7.4B
Total business travel spend baseline
Visit Orlando, 6.5M business travelers

Central Florida Visitor Economy



MCO Airport Passenger Growth



Visitor-economy impact tripled. Airlift up 70%. OCCC expanded to 2.1M+ sq ft. The infrastructure to deliver 97 convention nights now exists. 2027 & beyond is anyone's to cash-in on.

How to measure your 120+ nights of opportunity...

Convention Hotel methodology: a 3-year rolling average of actual group vs. leisure performance, projected forward to 2027.

01

Pull 2024, 2025, 2026 daily group share

For each date in the calendar, the actual percentage of room nights booked under group blocks vs. leisure transient.

02

Build the 3-year average per date

Smooths single-year noise. A bad weather year or one cancelled show does not disqualify a structurally strong date.

03

Filter to group share above 50%

Above this threshold, group is the primary demand driver. The property is functionally a convention hotel that night.

04

Record % of Group Bookings per qualifying dates

Rank 1 = strongest projected group night of the year. Rank 97 = the marginal qualifier still above 65%.

Result

120+ dates in 2027 where group bookings are the majority of demand