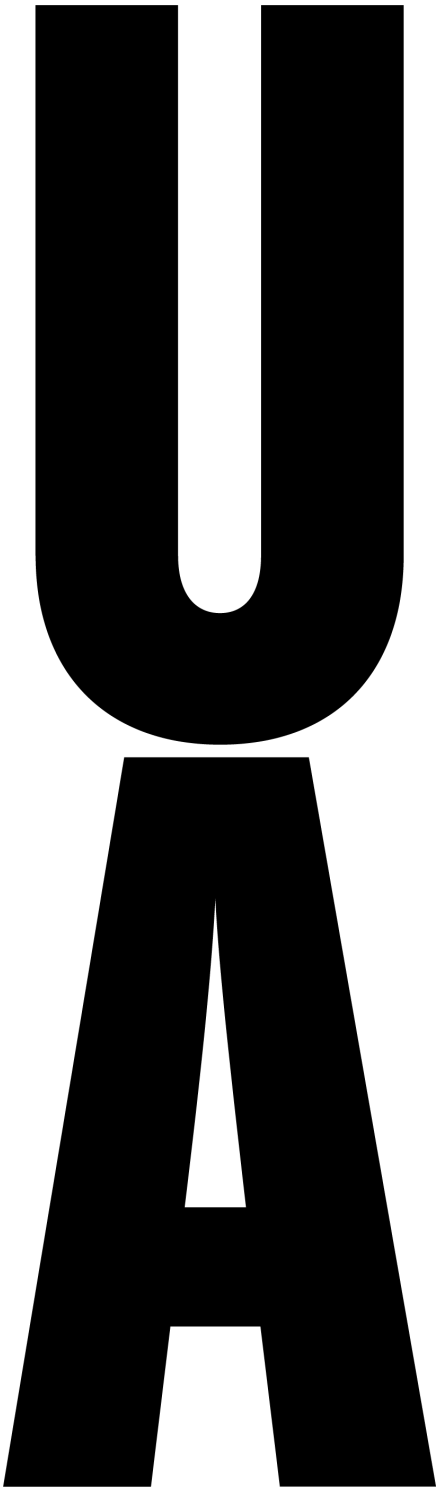




Q2-2026 CULTURAL TOURISM INITIATIVE REPORT

APRIL – JUNE 2026

PRESENTED TO

Visit Orlando



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Shared Goals

Visit Orlando Partnership Cultural Tourism Initiative	• Increase Cultural Tourism participation from 16% to 18% • Elevate global awareness of Central Florida’s arts and culture scene • Extend the stay of tourists and attract new visitors • Increase earned revenue for the cultural sector
CANVAS Goal 1 Position The City of Orlando and Orange County as a Global Creative Leader	1.3 Elevate Cultural Identity: Build the creative and cultural brand of the region through a combination of exceptional new creative products, expanded promotions, and opportunities for artists in the tourism sector.
CANVAS Goal 5 Build Cultural Sector Resilience	5.7 Build Arts and Cultural Organizations’ Capacity for Tourism: Build the capacity of smaller and emerging cultural providers to sustain and improve the quality, diversity, awareness, and brand of cultural experiences throughout the City of Orlando and Orange County

1. The Quarter at a Glance

Q2 was an efficiency quarter, and it closed on a milestone.

Paid media delivered 36% more clicks on a budget that grew 1%, cutting cost per click by a quarter. ArtsinOrlando.com returned to growth after the Q1 campaign peak, and the Discovery Newsletter cleared both email benchmarks following its May redesign. Out-of-state share of Meta spend quadrupled, reinforcing the initiative's visitor-facing strategy. Visit Orlando research released this quarter shows cultural participation among domestic visitors reached 19.0% in 2025, clearing the initiative's 18% goal. The two metrics to watch are outbound clicks, which fell 30%, and organic publishing on the @artsinorlando accounts.

Q2-2026 SCORECARD

Metric	Q2-2026	vs. Q1-2026	Insights
ArtsinOrlando.com			
Users	81,330	+1.3%	Returned to growth; +180% YoY
• Outside of Central Florida	72.7%	+0.7%	Staying on trend
Page Views	124,212	+3.8%	Deeper engagement per visit
Outbound clicks	7,397	-29.9%	Rate fell 12.2% to 9.2% — watch
Discovery Newsletter			
Open rate	43.1%	+9.3 pts	Above the 40% industry benchmark
Subscribers	12,403	+421	Steady growth
Social Media @artsinorlando			
Followers	1,399 (IG) 10,948 (FB)	+306 -5	Steady growth on IG
Paid media clicks	47,507	+35.7%	Same budget, materially more traffic
Cost per click	\$0.26	-25.4%	Best efficiency on record
Paid media spend	\$12,524	+1.1%	Essentially flat

2. Target Markets

Tourist Development Tax eligibility requires out-of-market targeting. Anyone reaching ArtsinOrlando.com from outside Central Florida is a prospective visitor, and Florida's drive markets are the nearest-term conversion opportunity. Site audience is reported in three tiers on that basis. Out-of-State has been the largest tier for five consecutive quarters, and roughly 73% of users now sit outside the local market.

Out-of-State is now the largest share of site audience

Share of scrubbed ArtsinOrlando.com users by market tier

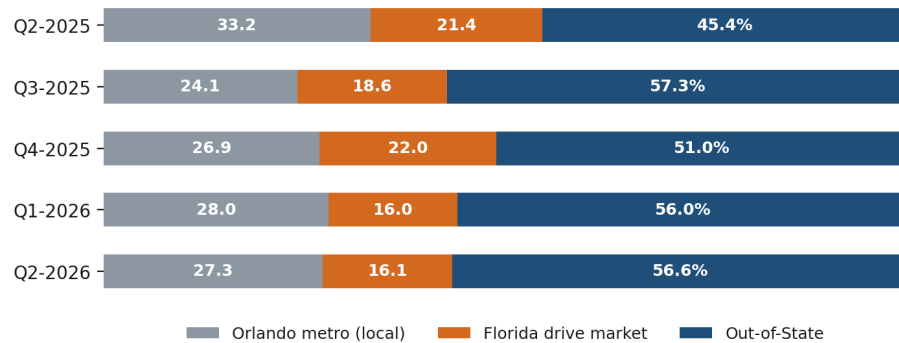


Figure 1 — ArtsinOrlando.com users by market tier, Q2-2025 through Q2-2026

Market tier	2025 Q2	2025 Q3	2025 Q4	2026 Q1	2026 Q2
Central Florida local market	33.2%	24.1%	26.9%	28.0%	27.3%
Outside Central Florida	66.8%	75.9%	73.1%	72.0%	72.7%
• Florida drive market	21.4%	18.6%	22.0%	16.0%	16.1%
• Out-of-State	45.4%	57.3%	51.0%	56.0%	56.6%

Central Florida local market or Orlando metro is defined as Orange, Seminole, Osceola, and Lake counties. Figures are scrubbed of datacenter routing and identified automated traffic; roughly 9% of raw Q2-2026 users were removed.

Top DMAs

Rank	Florida Drive Market	Out-of-State
1	Miami–Fort Lauderdale	New York
2	Tampa–St. Petersburg	Chicago
3	Jacksonville	Atlanta
4	Daytona Beach	Los Angeles
5	Gainesville–Ocala	Dallas–Fort Worth

3. Paid Media

3.1 Awareness Campaign (Always-On)



Always-On is the initiative's primary traffic engine. Q2 delivered the strongest efficiency in the campaign's history: clicks grew 36% while spend rose 1%, bringing cost per click to \$0.26 from \$0.35.

Always-On: 36% more clicks on a 1% budget increase

Spend was \$12,384 in Q1 and \$12,524 in Q2; cost per click fell 25%

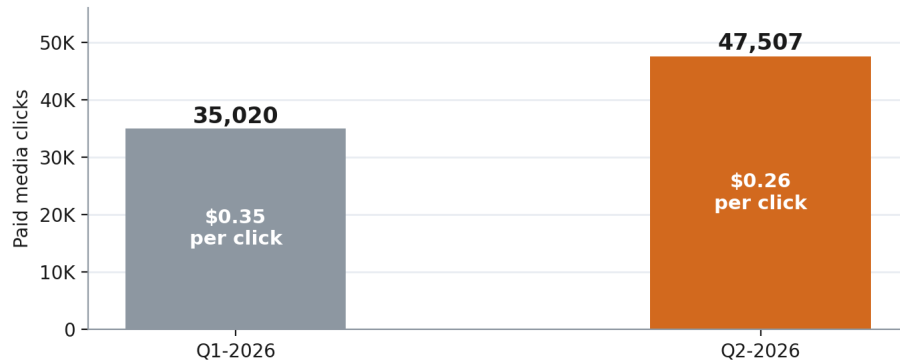


Figure 2 — Always-On clicks and cost per click, Q1-2026 vs. Q2-2026

Metric	Q1-2026	Q2-2026	QoQ	Benchmark
Impressions	2,815,440	2,861,881	+1.6%	—
Clicks	35,020	47,507	+35.7%	—
Spend	\$12,383.85	\$12,524.01	+1.1%	—
Cost per click	\$0.35	\$0.26	-25.4%	\$0.20–\$2.00
Cost per thousand	\$4.40	\$4.38	-0.5%	\$3.21–\$8.77

Q1-2026 figures restated from the Agency Analytics source. The Q1-2026 quarterly report used 2,222,832 impressions and 31,189 clicks; the platform export shows 2,815,440 and 35,020. All prior-quarter comparisons in this report use the platform figures.

Platform breakdown

TikTok generated the quarter's growth while its budget fell 11%: clicks rose 63% and cost per click dropped from \$0.45 to \$0.24. Instagram remains the highest-converting platform by click-through rate. Facebook clicks declined 37%, reflecting the March change of campaign objective from link clicks to landing page views.

TikTok delivered the quarter's growth on less spend

TikTok clicks rose 63% while its budget fell 11%

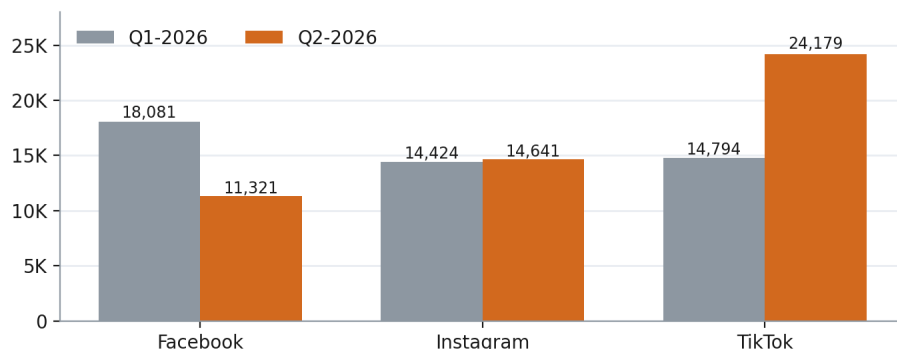


Figure 3 — Paid clicks by platform, Q1-2026 vs. Q2-2026

Platform	Q1 clicks	Q2 clicks	QoQ	Q2 CTR	Q2 CPC
Facebook	18,081	11,321	-37.4%	2.00%	\$0.21
Instagram	14,424	14,641	+1.5%	3.23%	\$0.27
TikTok	14,794	24,179	+63.4%	1.32%	\$0.24
Combined	35,020	47,507	+35.7%	1.66%	\$0.26

Seasonal campaigns are reported year over year. The 2026 flight ran February 16 to May 15 on a \$3,500 budget.

3.2 Spring into the Arts



Spring 2026 was a smaller campaign that bought cheaper clicks. Reach fell 60.6% and clicks 23.1% on 30.3% less spend, so clicks held up far better than reach. Because click-through rate is a ratio, the headline CTR gain from 1.51% to 4.45% is driven substantially by the smaller impression denominator. The defensible efficiency claim is cost per outbound click: \$0.206 in 2026 against \$0.227 in 2025.

Spring into the Arts: smaller campaign, cheaper clicks

Clicks held up far better than reach; cost per click improved 9.3%

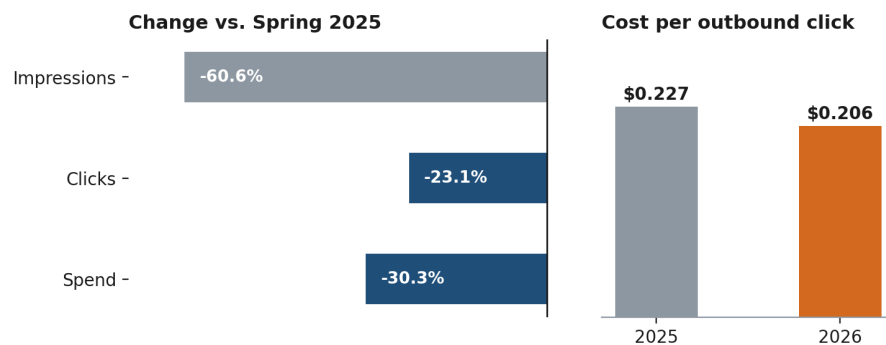


Figure 4 — Spring into the Arts, 2026 versus 2025

Metric	Spring 2025	Spring 2026	YoY	Read
Impressions	1,450,000	571,579	-60.6%	Smaller footprint
Outbound clicks	22,035	16,939	-23.1%	Held better than reach
Spend	\$5,000 budget	\$3,486 actual	-30.3%	Under-invested
Cost per outbound click	\$0.227	\$0.206	-9.3%	Genuine efficiency gain
Click-through rate	1.51%	4.45%	+194.7%	Ratio effect — see above

The agency dashboard reports Spring cost per click as \$0.14, calculated on total clicks. This report uses outbound clicks throughout so the figure is comparable to the click-through rate, which is also outbound-based.

Attribution and audience

Spring drove 14,615 new users and 17,557 sessions to ArtsinOrlando.com, with paid social accounting for 14,322 of the new users. Florida was the strongest region at a 5.64% click-through rate, with New York delivering 210,642 impressions and 6,851 clicks. Facebook carried 62% of impressions at a \$0.10 cost per click, making it the more cost-efficient platform for this campaign — the reverse of the Always-On pattern.

3.3 Out-of-Home — Clear Channel



This campaign is approximately one third complete, so Q2 should be read as an in-flight indicator rather than a final result. The 2026 flight launched at the start of June and runs through August; figures below cover only the portion inside Q2. The full year-over-year comparison will be reported in Q3 when both flights can be measured end to end.

The strategy changed this year. In 2025 United Arts handpicked roughly eight boards; in 2026 the buy rotates through target inventory as availability opens. Measured by weekly delivery, the change is working: the rotating buy is producing 82,770 impressions per week against 58,246 for the fixed boards at the equivalent stage.

Clear Channel: rotating inventory delivers 42% more weekly reach

Cumulative totals look flat only because the 2026 flight started later

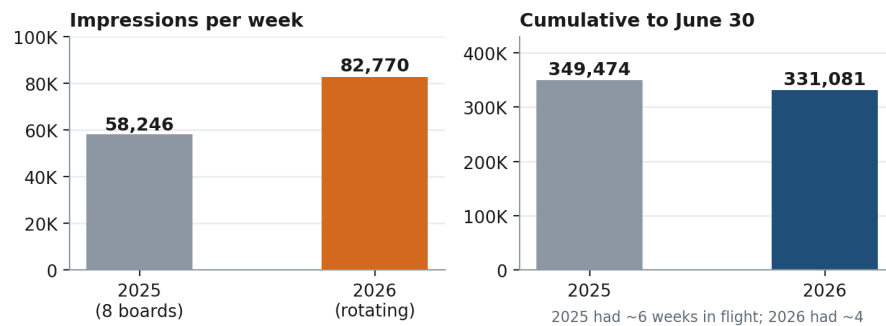


Figure 5 — Clear Channel delivery, Q2 window (2025 through 6/29, 2026 through 6/28)

Metric	2025 (Q2 portion)	2026 (Q2 portion)	YoY	Read
Impressions per week	58,246	82,770	+42.1%	Rotating inventory wins
Cumulative impressions	349,474	331,081	-5.3%	2026 started ~2 weeks later
Weeks in flight	~6	~4	—	Different campaign stage
Clicks	847	331	-60.9%	Creative addressed in July
Click-through rate	0.24%	0.10%	-0.14 pts	See note below

For context, the 2025 flight finished at 1,000,607 impressions and 1,743 clicks by August 17, and overdelivered contracted spots across all four proof-of-performance periods, ranging from 111% to 202%. No 2026 proof-of-performance or spend figures are available yet.

4. Owned Media

4.1 ArtsinOrlando.com

After the Q4-2025 campaign peak, the site returned to growth. Users rose 1.3% and page views 3.8% quarter over quarter, with page views growing faster than users — each visitor consumed more content.

ArtsinOrlando.com returned to growth in Q2

Users up 1.3% and page views up 3.8% versus Q1; both roughly doubled year over year

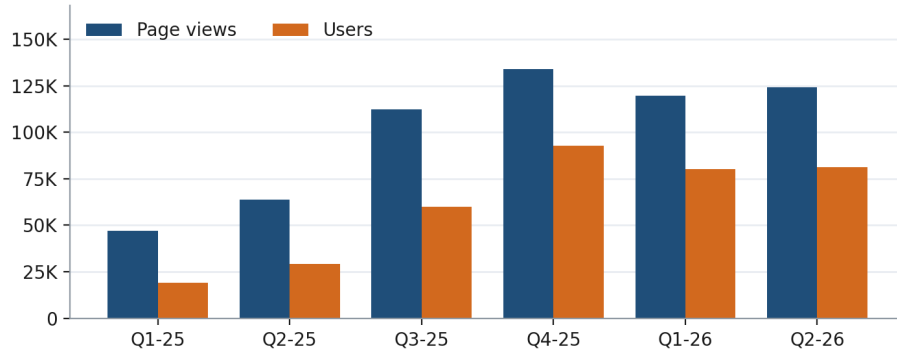


Figure 6 — Users and page views by quarter, Q1-2025 through Q2-2026

Metric	Q1-2026	Q2-2026	QoQ
Users	80,260	81,330	+1.3%
Page views	119,698	124,212	+3.8%
Sessions (raw)	86,532	80,412	-7.1%
Outbound clicks (raw)	10,547	7,397	-29.9%
Outbound click rate (raw)	12.2%	9.2%	-3.0 pts

Users and page views are the adjusted figures from the internal tracker, which correct for tracking outages and automated traffic. Sessions and outbound clicks are unadjusted GA4 totals; the outbound click rate is calculated on that unadjusted basis so both numerator and denominator are consistent.

4.2 Discovery Newsletter



The May **redesign and shift to a twice-monthly** cadence produced the clearest single improvement of the quarter. June closed at a 45.2% open rate and a 4.6% click rate, and average clicks per issue more than tripled.

Discovery cleared both email benchmarks in Q2

Clicks per issue rose from 138 to 463

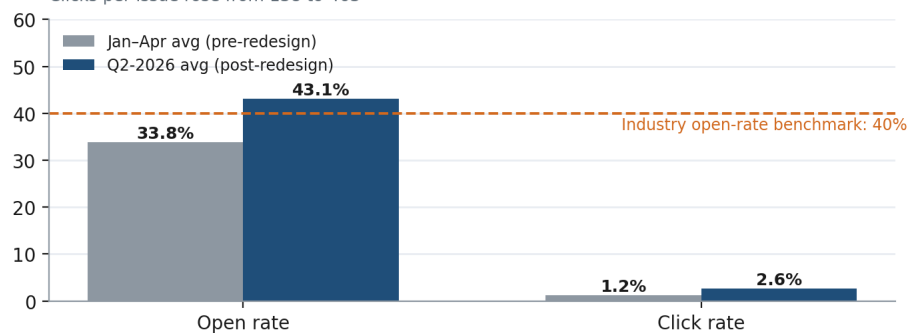


Figure 7 — Discovery Newsletter performance before and after the May redesign

4.3 Social — @artsinorlando

Cultural Tourism manages the @artsinorlando accounts, which carry audience-development content. The @unitedarts_cf institutional accounts are managed separately by Marketing and are excluded here.

Organic publishing on the AiO accounts contracted sharply in Q2. Posts fell from 171 to 51 and impressions from 53,941 to 14,296, with June nearly dark at five posts across both platforms. Audience did not leave — Instagram followers grew 28% over the quarter — but the channel produced little new reach while paid media scaled.

Metric	Q1-2026	Q2-2026	QoQ	Read
Posts published	171	51	-70.2%	Output decreased
Impressions	53,941	14,296	-73.5%	Tracks output
Shares	174	44	-74.7%	Tracks output
Reactions	458	94	-79.5%	Tracks output
Instagram followers	1,093	1,399	+28.0%	Audience retained
Combined followers	12,046	12,347	+2.5%	Steady

5. Programs & Services

Paid and owned media move people toward Orlando's cultural offer; this section covers the work that makes the offer ready to receive them — training the professionals who influence visitor decisions, building capacity in the cultural sector, and connecting local artists to the meetings and conventions market. Q2 closed with Cultural Concierge past its first cohort threshold, Tourism-Ready in production, and the artist pipeline producing confirmed bookings.

5.1 Cultural Concierge Course

The Cultural Concierge Course is a free 30-minute training for hospitality, travel, and tourism professionals, hosted at learn.artsinorlando.com. It equips the people visitors ask first — front desk staff, concierges, travel advisers, attractions and convention personnel — to recommend Central Florida arts and culture with confidence.

The course passed 97 graduates. Enrollment growth remains the priority against a 300-graduate target, with employer-level adoption through Visit Orlando member relationships, hotel management companies, and industry associations the fastest available lever.

Measure	Status	Read
Graduates (cumulative)	97	Past the first cohort threshold
Target	300	Individual enrollees
Progress to target	32%	Employer adoption is the scaling lever
Format	30 min	Free, self-paced, online

Recognition and shareability tools are in development to support peer recruiting among graduates.

5.2 Tourism-Ready Course

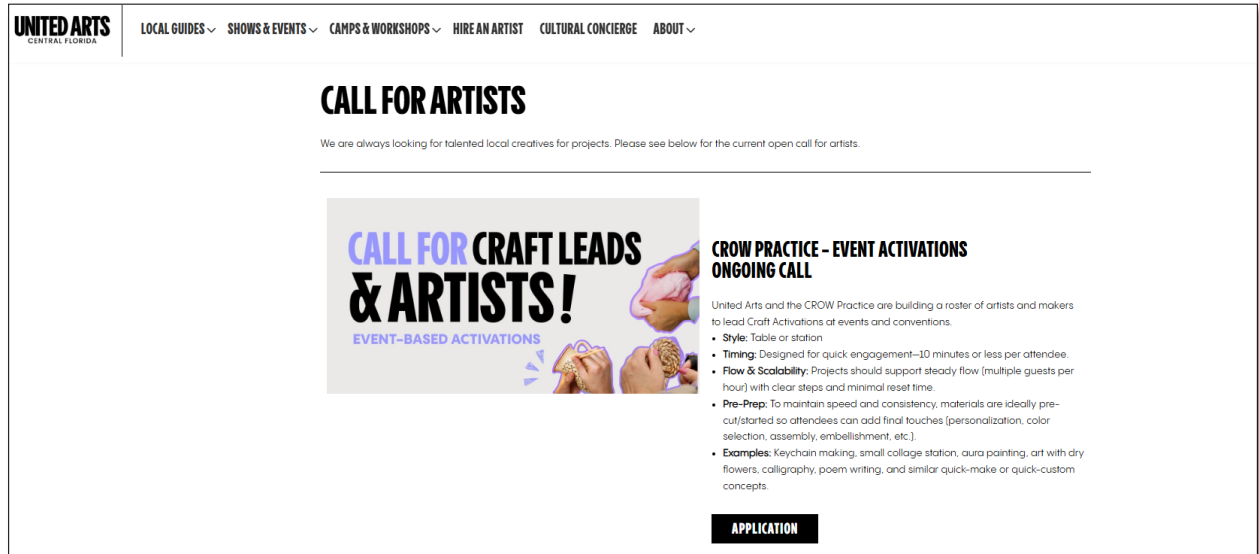
The Tourism-Ready Course is the sector-facing counterpart to Cultural Concierge: a self-paced training that helps arts organizations, venues, and individual artists become genuinely bookable by visitors. It is built on the FUBM framework — Findable, Understandable, Bookable, Memorable — which gives cultural organizations a concrete diagnostic for how a visitor actually encounters them.

Q2 advanced the course from concept to production. The framework, course structure, participant workbook, and training approach were developed and approved by Visit Orlando. Audio-visual production is underway with the contracted studio, and steering committee review of the workbook is in progress.

Component	Q2 status	Read
FUBM framework	Complete	Approved by Visit Orlando
Course structure	Complete	Module sequence and learning outcomes set
Participant workbook	Designed; in review	Steering committee and internal feedback in progress
A/V production	In progress	First draft of script delivered to studio
Launch	Pending	Estimated for October 2026

The two courses are designed to work as a pair. Cultural Concierge builds demand-side fluency across the hospitality frontline; Tourism-Ready builds supply-side readiness across the cultural sector. Neither delivers its full value without the other.

5.3 Artist Hub & Calls



Cultural Tourism connects local artists to the meeting and event planners bringing business to Orlando. The work runs on two tracks: direct introductions, where a planner is matched to specific artists, and managed open Calls for Artists at ArtsinOrlando.com/call, where a brief is published to the full local artist pool. Both tracks end in the same place: a local artist paid by a visiting organization — the initiative's most direct economic outcome for artists, and the FY30 Strategic Plan measure on artists hired by hospitality and tourism.

Measure	Q2-2026	Cumulative	Read
Calls for Artists managed	7	8	Six completed, one still in flight
Submissions received	92	150	From completed calls — excludes in-flight
Artists connected directly	6	32	Named introductions to planners
Confirmed bookings	3	10	A floor — several statuses pending
Planner organizations served	5	7	Corporate, association, and DMO
Events served	5	17	Through either track — see note

Events served counts every event that received artist support through either track. The five Q2 events: Leadership

5.4 Destination Tools — Southern Fried Poetry Slam Venue Map

United Arts developed a custom venue map, produced in both print-ready and digital formats, for the Southern Fried Poetry Slam national convention. The festival ran across multiple Orlando venues, and the map gave poets, coaches, ambassadors, and attendees a single wayfinding tool for navigating the city over the course of the event.

Beyond the map itself, this establishes a repeatable pattern: multi-venue events are where Orlando's cultural geography is hardest for visitors to read, and producing this resource positions Cultural Tourism as a practical service to incoming events, not only a marketing channel. The template is reusable for future conventions and festivals.



Sector leadership — National Association of Performing Arts Centers

On June 18, Cultural Tourism presented the Cultural Tourism Initiative Roadmap to the National Association of Performing Arts Centers, taking the Orlando model to a national professional audience.

The presentation, delivered alongside Visit Orlando, framed the arts agency–destination marketing organization partnership as a transferable playbook: how the alignment was built, what was launched in what order, what the lessons were, and what any market can replicate.

This is the first national positioning of the initiative as a model rather than a local program. The full quarter of engagements is listed under Partnerships & Outreach below.



6. Partnerships & Outreach

Q2 outreach concentrated on tourism, government, and cross-sector settings — the audiences most likely to influence visitor-facing arts participation.



April	9	I-Drive Luncheon	Cross Sector
April	21	Tour of Loch Haven & Orlando Family Stage with Blue Man Group CEO Thali Sugisawa	Cross Sector
April	28	DOP Connect Arts & Culture Day Thali Sugisawa	Cross Sector
May	5	Cultural Tourism Steering Committee Thali Sugisawa	Internal; Cross Sector
May	5	Visit Orlando Open House Thali Sugisawa	Cross Sector
May	5	CFHLA Open House Thali Sugisawa	Cross Sector
May	7	Visit Orlando Travel & Tourism Event	Cross Sector
May	12	CANVAS Cultural Plan Committee Thali Sugisawa	Government
May	14	Heart of Florida United Way Luncheon Thali Sugisawa	Cross Sector
May	21	CFHLA Hob Nob Vianka Rivera	Tourism Industry
June	2	Q2 Visit Orlando Communications Committee Thali Sugisawa	Tourism Industry
June	3	Q2 I-Drive CRA Meeting Thali Sugisawa	Government
June	5	Mayor Deming's State of the County Thali Sugisawa	Government

June	18	National Association of Performing Arts Centers Thali Sugisawa	Arts & Culture
June	23	Visit Orlando's Power Lunch Vianka Rivera	Cross Sector

7. Cultural Tourism Participation Data

The initiative's headline goal has been met, making this section the report's outcome frame rather than a separate data appendix. Visit Orlando research shows 19.0% of domestic visitors participated in a cultural activity in 2025 — the highest share in the seven-year series and above the 18% benchmark set at the start of the Cultural Tourism Initiative. Orlando received 70.6 million domestic visitors in 2025.

19% of visitors engaged with culture in 2025 — a seven-year high

Festivals and fairs contributed two thirds of the year's gain

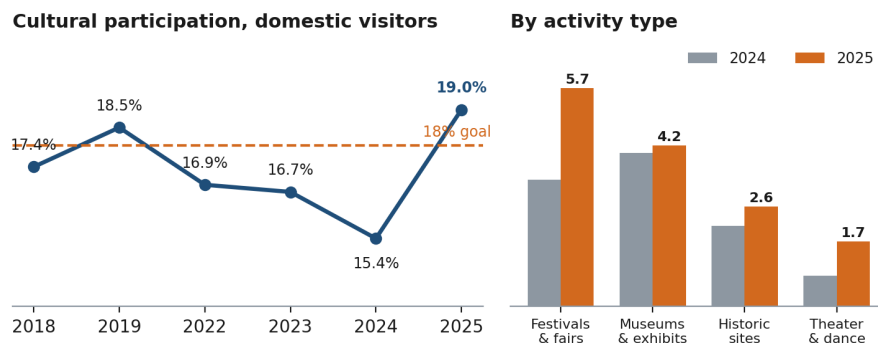


Figure 8 — Cultural participation among domestic visitors to Orlando, 2018–2025

Activity type	2024	2025	Change
Festivals & fairs	3.3%	5.7%	+2.4 pts
Theater & dance	0.8%	1.7%	+0.9 pts
Historic sites	2.1%	2.6%	+0.5 pts
Museums & art exhibits	4.0%	4.2%	+0.2 pts
All cultural activities	15.4%	19.0%	+3.6 pts

Source: DK Shifflet / MMGY Travel Intelligence, domestic visitors to Orlando, via Visit Orlando Research.