



#TourismStrong



Where We Were

2019 Economic Impact: Dane County

\$1.4 BILLION

DIRECT SALES

\$2.3 BILLION

TOTAL SALES

22,603 JOBS

SUPPORTED BY TOURISM



FOOD/BEVERAGE

\$385 MILLION

28.3%



LODGING

\$356 MILLION

26.2%



RETAIL

\$280 MILLION

20.6%



TRANSPORTATION

\$169 MILLION

12.4%



RECREATION

\$170 MILLION

12.5%

2020 Conventions and Events*

	Attend	Direct Spending	Total Rooms
Total Convention Sales / Services # Events to occur in 2020 = 83	92,899	\$37,282,098	74,977
Total Sports # Events to occur in 2020 = 33	112,050	\$26,310,461	44,611
All Events that were to occur in 2020 = 116	204,949	\$63,592,559	119,588

* Includes 21 conventions and 3 sports events at Monona Terrace

2021 Confirmed Events

Confirmed Events to occur in 2021			
As of 6/17/20			
	Attend	Direct Spending	Total Rooms
Total Convention Sales / Services # Events to occur in 2021= 39	29,259	\$13,162,265	23,768
Total Sports # Events to occur in 2021 = 4	16,100	\$3,357,667	6,528
All Events that were to occur in 2021= 43	45,359	\$16,519,932	30,296
Includes 19 conventions and 2 sports events at Monona Terrace			

Reality: Where We Are Today

Actions we have taken to mitigate costs for 2020:

- **Personnel: \$1.3 million reduction in budget**
 - Staff reductions effective March – 8 full time, 4 part time
 - Furloughs for all remaining staff
- **Programs and Operations: \$1.2 million reduction in budget**

Overall reduced 2020 expenses by \$2.5 million — 35% of total budget

As we move forward into 2021 it will be necessary to reinstate sales and marketing programs that we curtailed in 2020



Greater Madison Tourism Today

To date **63 conventions** and sporting events that we contracted* for have cancelled:

- Loss of **\$46.3** million in direct spending
- Over **94,000** hotel room nights
- Over **116,000** visitors to our destination


*Does not include World Dairy Expo

We have seen longstanding local events that attract many visitors to Madison cancel:

- WIAA State Boy's Basketball/Golf/Tennis/Softball
- UW Commencement
- Wisconsin Film Festival
- Sugar Maple Musical Festival
- Great Taste of the Midwest
- Paddle & Portage
- Midwest Horse Fair

Retaining Business

We have been working diligently to retain conventions and events where possible

- Seven events, including the Wisconsin Governor's Conference on Tourism, have rescheduled for 2021, and one has rescheduled for later in 2020
 - An additional event rebooking for 2024
 - An additional event rebooking for 2026
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Competitive Environment

- Other cities are opening up
- Offering incentives for booking business
- Leveraging safety messaging
- Meeting planners are delaying decisions
- Customers not ready to talk



Facing Uncertainties

- Hybrid meeting needs
- Incentive structure
- Public health restrictions and guidance: Forward Dane, Badger Bounce Back
- Business imposed travel bans/restrictions
- Capacity
- Public sentiment
- Visitor behaviors



Competition



Dear Heather,

Yes, you read the subject line correctly.

Indy wants to give you extra peace of mind as our world recovers, reopens, and reconnects. That's why *USA Today's* "#1 Convention City in America" is offering zero attrition to groups that contract and actualize in 2020.

Our goal is simple: to help you recover and reconnect with attendees while lessening the financial risk.

[Click here](#) to see the participating properties.

Or, [email me](#) to book with confidence.

Best regards,



GET MORE FOR LESS IN MINNEAPOLIS

2021 Meeting Incentives:
Book Now!

Escape the budget blues - the time to meet in Minneapolis is 2021!

Discover the destination that's been on every Meeting Planner's list to check-out for their next meeting. Over 160 direct flights, amazing meeting spaces, 9,000+ hotel rooms downtown, a city literally surrounded by nature, and a vibrant compact city with so much more to do once the workday is over.

MEET MINNEAPOLIS

- \$3.00 per actualized room night payable to group
- One round-trip Delta airline voucher to be used for pre-planning or for the event

MINNEAPOLIS HOTELS

- One complimentary room per 35 rooms actualized
- 3% rebate to final billing
- 15% off 2021 banquet menus
- Award Points and more offered by individual properties

MINNEAPOLIS CONVENTION CENTER

- 20% off rent
- 20% off AV equipment

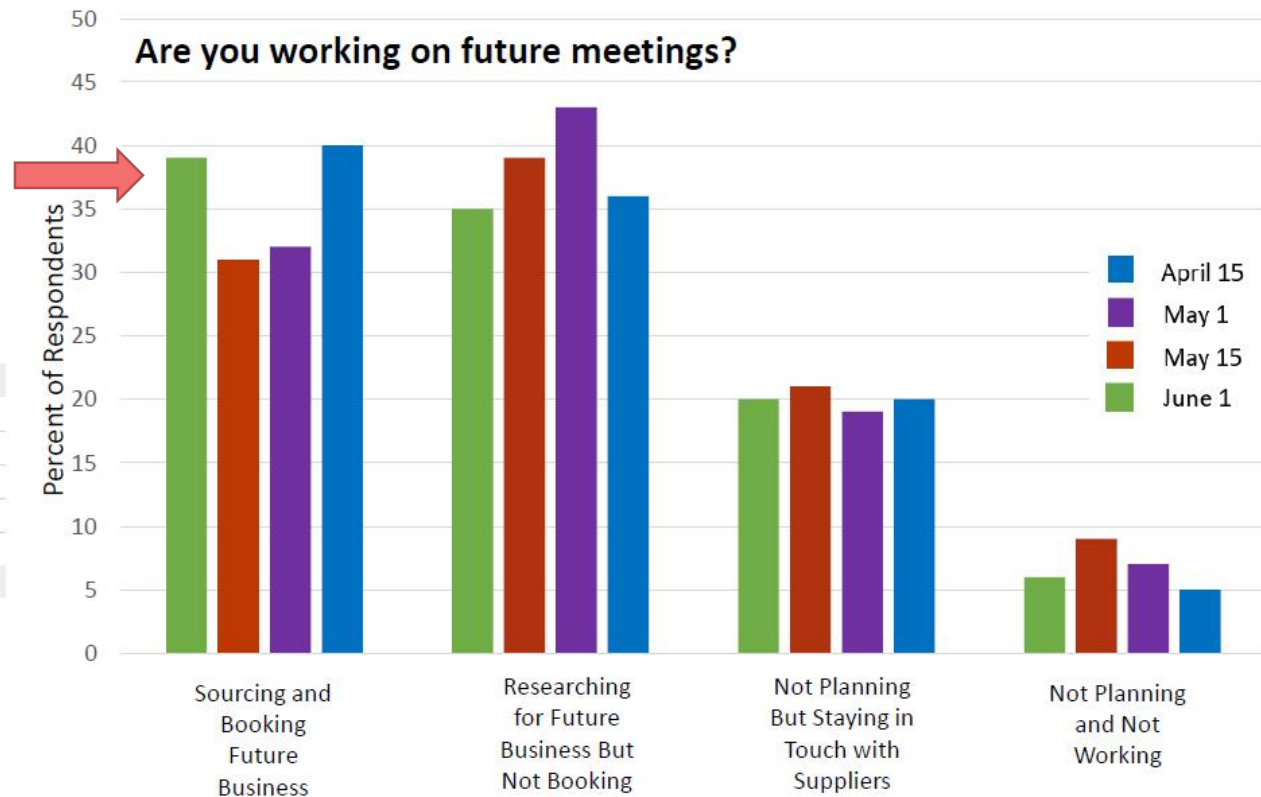
Facing Uncertainties



After nearly two months of declines, have we found the bottom?
More planners are booking, not just looking

June 1 Responses

ANSWER CHOICES	RESPONSES	
Yes, sourcing and booking future business	38.68%	222
Researching for future meetings but not booking	35.19%	202
Not planning, but staying in touch with destination and venue partners	20.73%	119
Not planning and not staying in contact at this point	2.96%	17
Not employed	2.44%	14
TOTAL		574



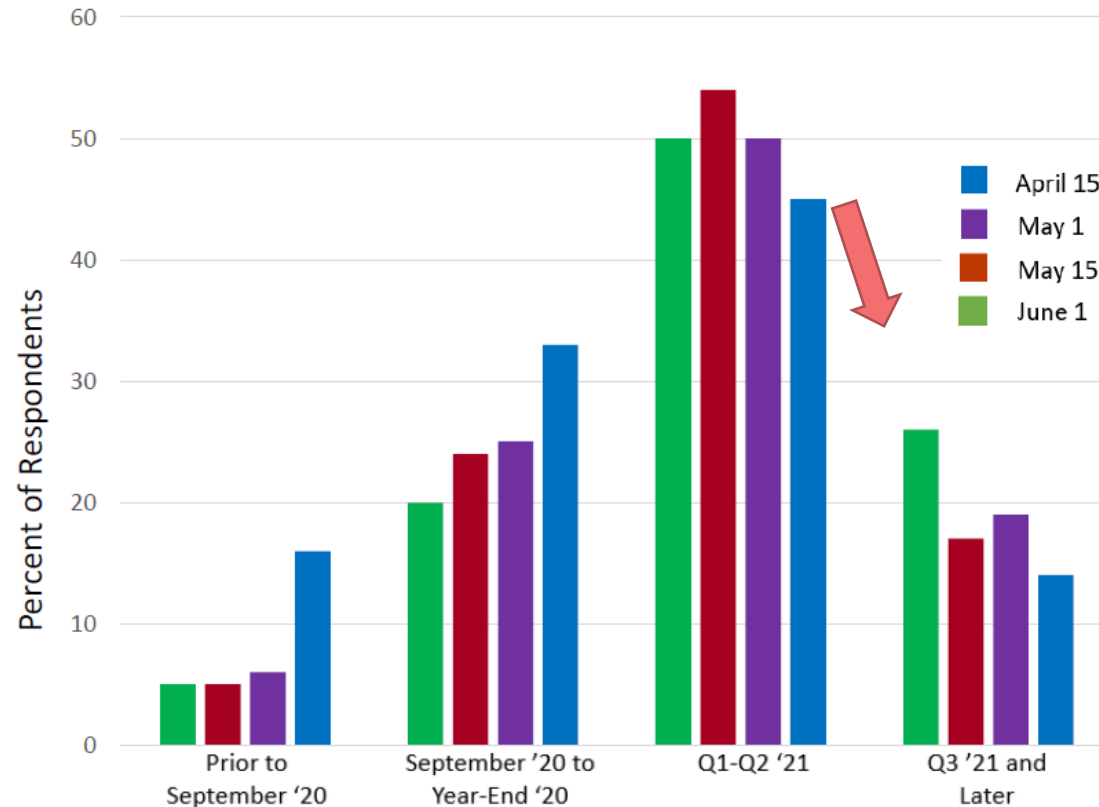
Facing Uncertainties

When scheduling new events, planners are showing increased preference for the back half of '21 and beyond

When is the earliest you are scheduling NEW meetings and events?

June 1 Responses

ANSWER CHOICES	RESPONSES	
▼ Prior to September 2020	4.55%	26
▼ September to Year-End 2020	20.45%	117
▼ Q1 2021	32.69%	187
▼ Q2 2021	16.96%	97
▼ Q3 2021	9.62%	55
▼ Q4 2021	4.55%	26
▼ Q1 2022 and later	11.19%	64
TOTAL		572



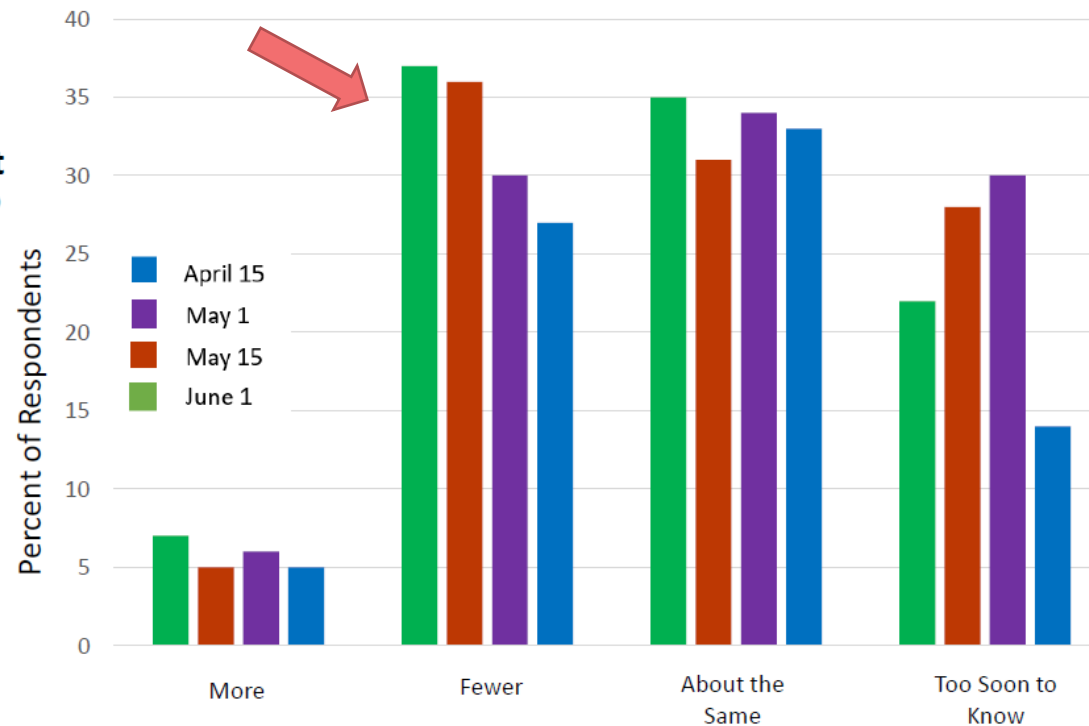
Facing Uncertainties

As planners begin to firm up their plans post-COVID-19, more planners are hopeful for their program volume

Once the threat of COVID-19 has passed, over the next 12-18 months, will you plan more or fewer meetings?

June 1 Responses

ANSWER CHOICES	RESPONSES	
More	6.59%	38
Fewer	36.57%	211
About the same	35.01%	202
It's too soon to know.	21.84%	126
TOTAL		577



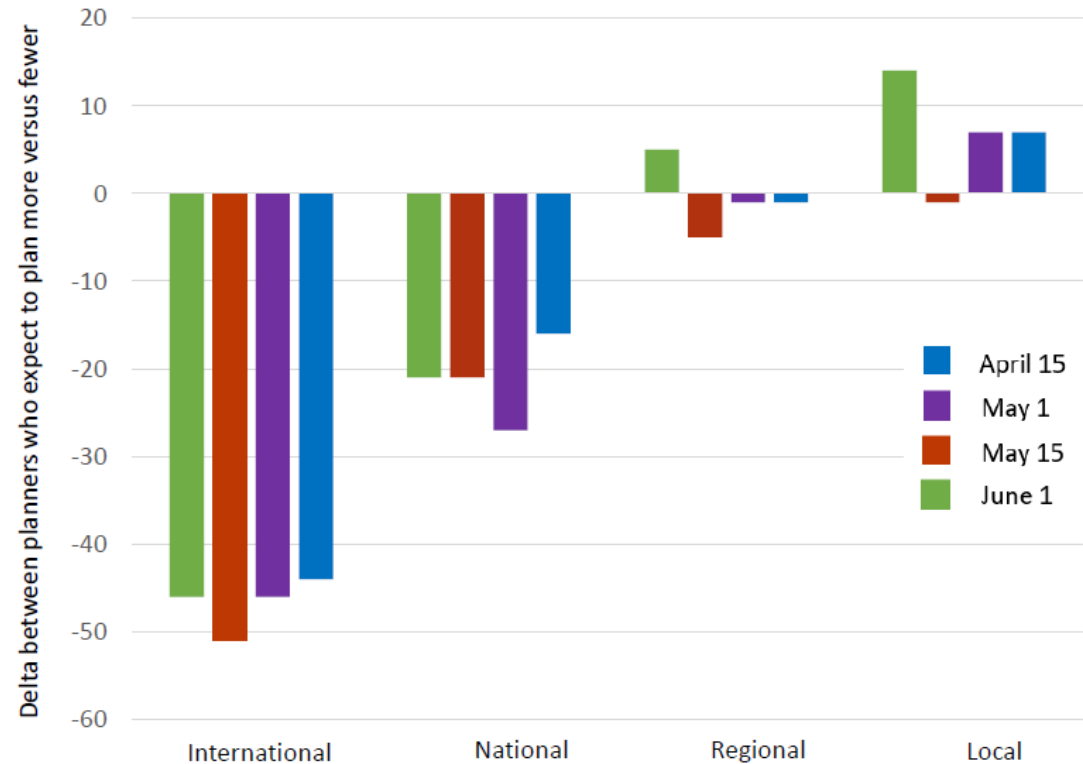
Facing Uncertainties

Regional and local events are “back in the black”; planners expect to plan more of them post-Covid-19

Once the threat of COVID-19 has passed, will you plan more or fewer meetings over the next 12-18 months?

June 1 Responses

	MORE	FEWER
International	4.78% 14	51.88% 152
National	9.91% 46	31.03% 144
Regional	28.33% 117	23.00% 95
Local	32.09% 120	18.18% 68
Trade Shows/Exhibitions/Congresses	3.65% 11	39.20% 118
Association	5.73% 16	24.73% 69



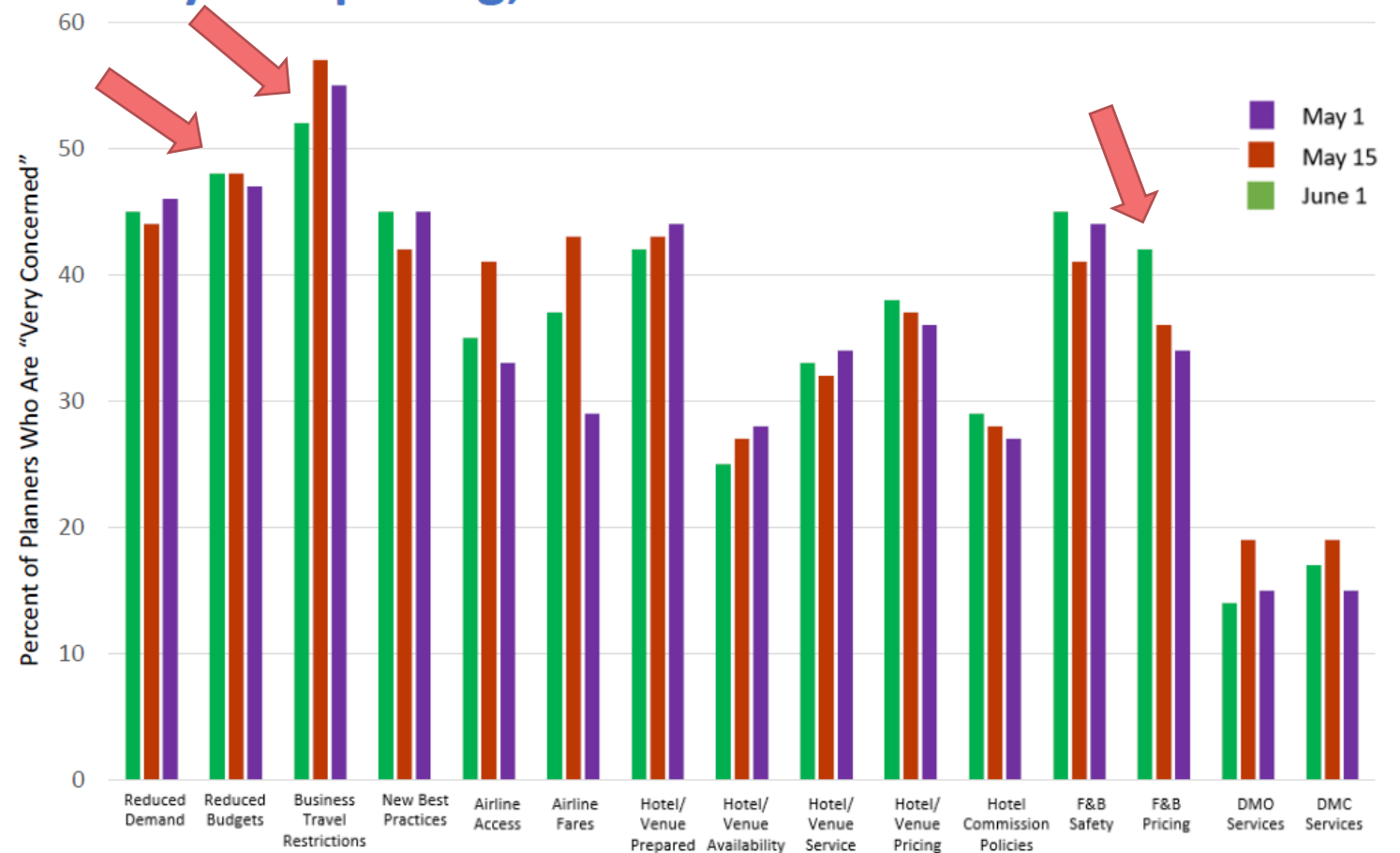
Facing Uncertainties

Planners are “very concerned” about a lot of things, but there’s increased concern for F&B safety and pricing, and business travel overall

How concerned are you about the following?

June 1 Responses

	VERY CONCERNED		VERY CONCERNED
Reduced demand for in-person meetings and events	44.94% 253	Hotel and venue availability	25.27% 141
Reduced meeting and event budgets	48.04% 270	Hotel and venue service levels	33.57% 186
Travel policy updates restricting business travel	51.72% 286	Hotel and venue pricing and rates	38.67% 215
New best practices for gatherings	44.40% 246	Hotel commission policies	28.79% 137
Airline accessibility	35.38% 190	Food-and-beverage safety	45.62% 255
Airline fares	37.48% 199	Food-and-beverage pricing	42.01% 234
Hotel and venue health and safety preparedness	42.07% 236	DMO availability and service levels	14.69% 85
		DMC availability and service levels	16.67% 86



Facing Uncertainties

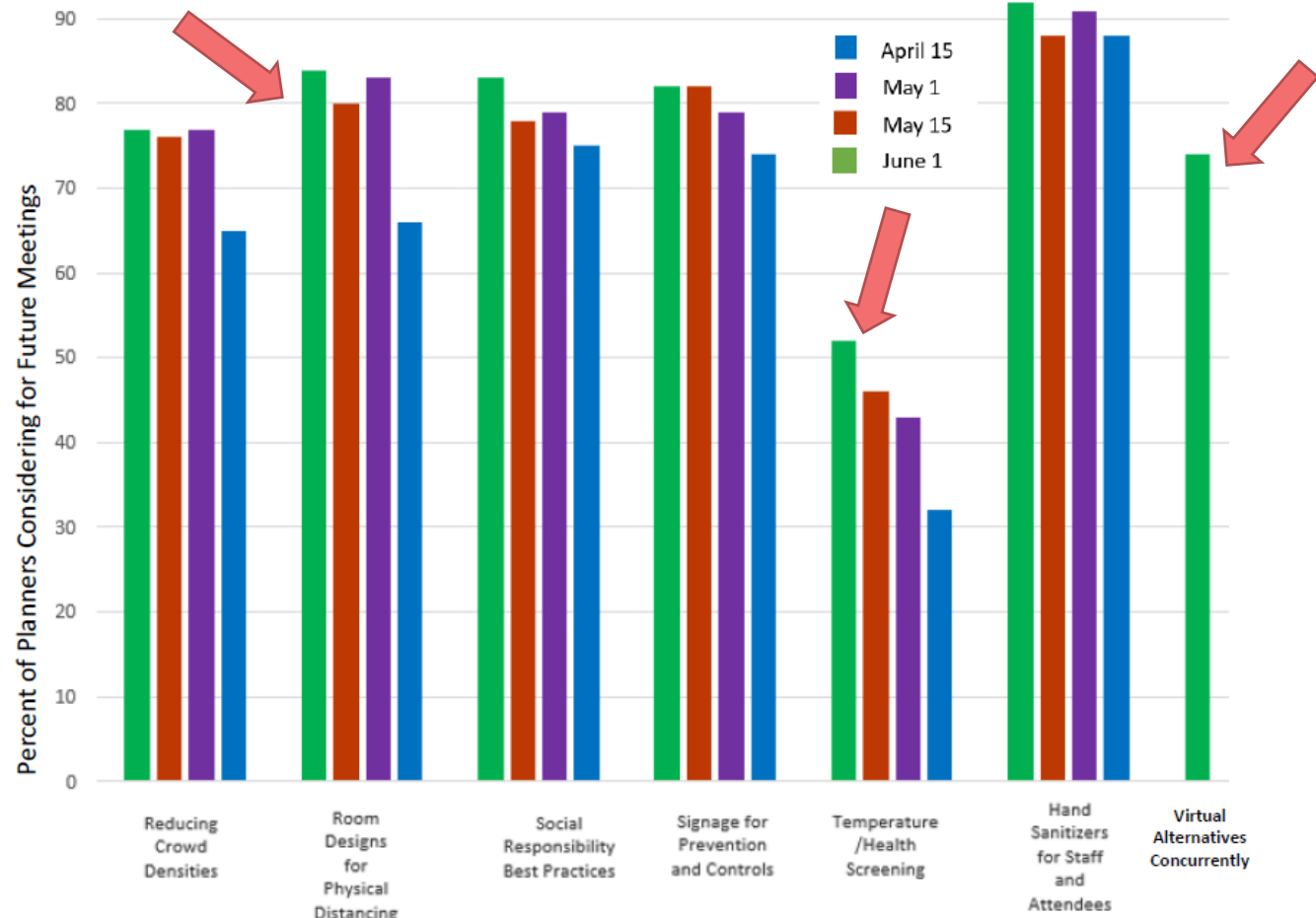
Temperature screening is on the rise, while 3 out of 4 planners consider virtual hybrids

Are you considering any of the following in the planning of future events?

June 1 Responses

ANSWER CHOICES	RESPONSES
Reducing and managing crowd densities	77.57% 446
Developing meeting room designs to encourage physical distancing	65.63% 492
Putting into place social responsibility best practices, including protocols for attendees who are ill	82.78% 476
Providing signage regarding prevention and control measures (shaking hands, washing hands, etc.)	81.91% 471
Providing temperature/health screening	52.00% 299
Providing hand sanitizer on-site for staff and attendees	93.04% 636
Providing virtual alternatives concurrently with physical events	74.43% 428
None of the above	2.78% 16
Other (please specify)	4.70% 27

Total Respondents: 575



What We Are Doing

Sales Cycle

Our convention and events sales team works years in advance of an event to secure commitments.

For all confirmed events – the average number of days from lead to event are:

- Ave lead date to Event Date* 465.98

For Monona Terrace contracted events – the average number of days are:

- Ave lead date to Event Date at MT* 1039.66

* Does not include time invested from client contact date and relationship development to lead



Sales Strategies

- Destination Meetings Industry Positioning
 - Risk management and mitigation – attrition and Force Majeure
 - Protecting for the safety and comfort of attendees GBAC Certification
 - Virtual meeting attendance
 - Create a collaborative small meetings campaign
 - Sales blitzes (Local/Statewide) integrated with each hotel/facility sales staffs
 - “Keep” Your Meeting Home messaging
 - Deployment/Sales Focus
 - Increased focus on state and regional groups
 - Assisting clients with rebooking and repositioning
 - Target account profile development and touchpoint planning
 - Virtual events for meeting planners
 - Bring Your Meeting Home – Campus Connection
 - Branding and marketing
 - Digideck – a digital bid book and business development tool
 - PCMA newsletters
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Recovery: Next Six to Eighteen Months

Travel segments and anticipated recovery sequence:

- Leisure within reasonable drive time
- Business traveler
- Group events (e.g. conventions, sporting events, festivals)

Destination Madison current marketing initiatives will pursue regional leisure visitor opportunities while parallel sales efforts will pursue convention and event business that have long lead times to secure



Recovery: Next Six to Eighteen Months

Objectives for Recovery


1. Get industry people back to work
2. Attract regional leisure travelers who support our local restaurant and retail businesses
3. Collaborate with industry and community partners on opening and recovery strategies
4. Promote the destination brand
5. Engage our clients to secure convention and event business for 2021, 2022 and beyond

Safety for community, employees and visitors are at the forefront of our work

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Recovery: Next Six to Eighteen Months

Readiness messaging will focus on safety:

- Building consumer and resident confidence and trust in safety of our community and local businesses by communicating our destination safety practices
 - Work with partners to demonstrate flexibility in meeting visitor and client needs and expectations
 - Foster and encourage responsible visitor behaviors
 - Ensure a welcoming destination
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Resilience: We are #TourismStrong

Visitors are critical to lead our community economic recovery forward.


And, community support is crucial:

- Continue to support local businesses that are “open”
- Keep Your Meetings Home: Host your business meetings and conferences in Madison
- Welcome visitors to our community

We are poised to reimagine and rebuild the tourism economy and connect visitors safely to the community.

A large, abstract, red shape with irregular, wavy edges is positioned in the bottom right corner of the slide, partially overlapping the white background.

Investing for the Future

- Investment in Destination Madison today will generate economic impact in future years as business travel, conventions and events recover
 - The City's future share of room tax is at risk without investment in destination marketing
 - Supporting the recovery of tourism gets people back to work in the community
 - Destination Madison is the only entity whose key focus is to drive room tax generation and serve as a catalyst to local economic recovery
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Destination Madison: Our Roles

- Recovery for Economy
 - Return on Investment
 - Responsible Stewards
 - Reputation of Destination
 - Resilience for industry and community
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