



State of Tourism in Madison

destination
madison[™]

Welcome

Ellie Westman Chin

President & CEO, Destination Madison

chin@visitmadison.com

Rob Gard

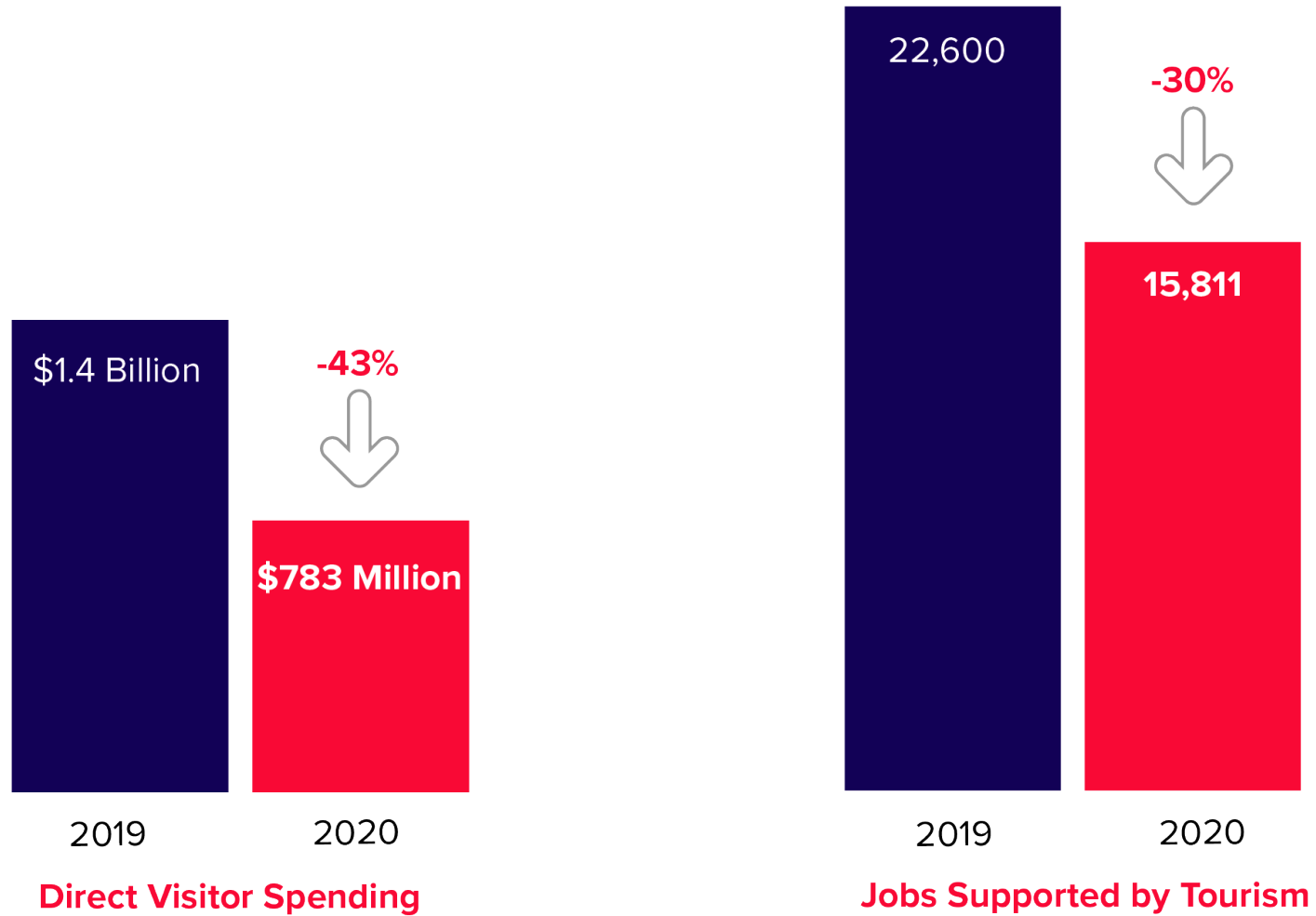
Director PR & Communications, Destination Madison

gard@visitmadison.com



Pandemic Impact on Local Community

2020 Economic Impact



2020 Economic Impact



FOOD/BEVERAGE

2019
\$385M

↓

2020
\$244M

-37%



LODGING

2019
\$356M

↓

2020
\$121M

-66%



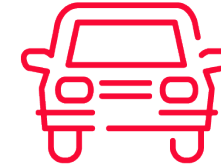
RETAIL

2019
\$280M

↓

2020
\$207M

-26%



TRANSPORTATION

2019
\$169M

↓

2020
\$119M

-30%



RECREATION

2019
\$170M

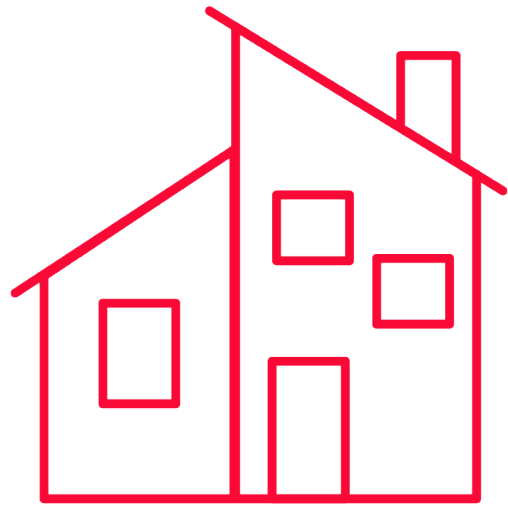
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2020
\$93M

-46%

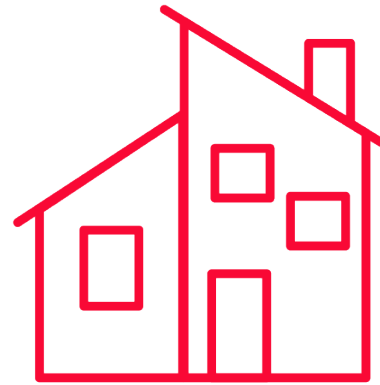
2020 Economic Impact

Tax Revenue



2019

\$780 per household



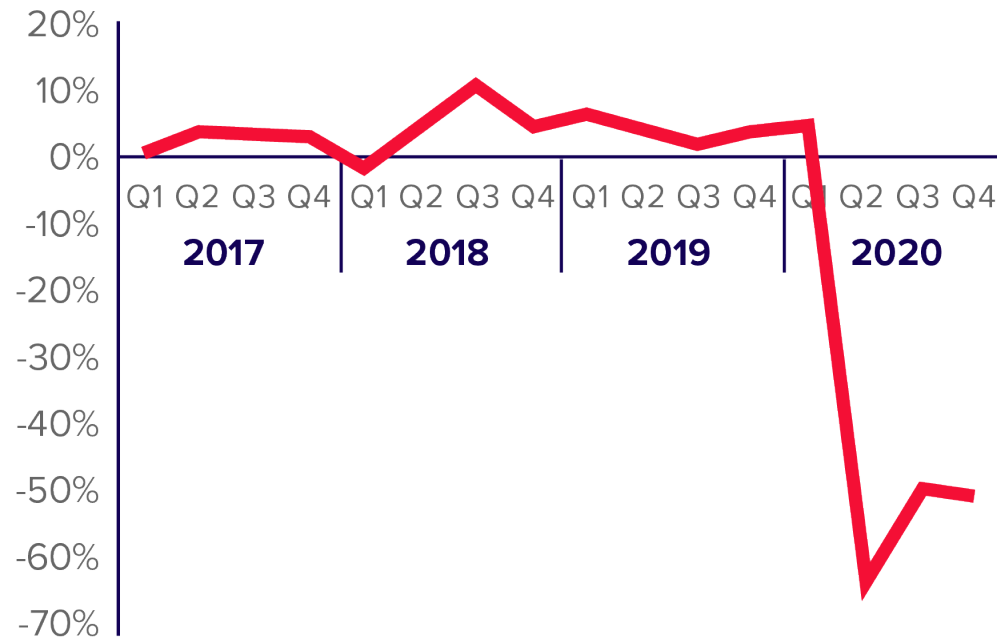
2020

\$507 per household



2020 Economic Impact

Dane County Y-O-Y Growth Rates by Quarter



Destination Madison Impact

- 93 events canceled in 2020 and 39 events canceled in 2021 that were directly booked by Destination Madison:
 - 137,700 room nights unfulfilled
 - 208,301 attendees not traveling
 - \$71,805,471 in expected direct spending lost
- Destination Madison's \$5.6 million budget was cut by more than 50%
 - Grants and Federal loans lifted the impact to a 43% cut in 2021

Industry

Stakeholder Conversations

Held a series of virtual conversations with hospitality partners

- Hotels
 - Restaurants
 - Bars
 - Venues
 - Cultural Attractions
 - Breweries/Distilleries
 - Performing Arts
 - Regional community partners
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Stakeholder Conversations

What We Learned

- **Industry staffing**
 - **Downtown is critical to the region**
 - **Planners rebooking away from Madison/Events moving to areas with fewer restrictions**
 - **Equipment availability**
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RECOVERY PLAN

Progress Update – September 2021

Recovery Priority #1

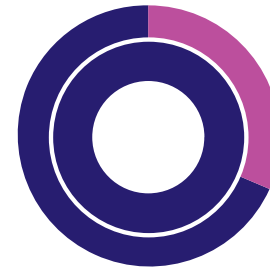
Implement a creative, year-long marketing/storytelling program to inspire travel to Madison.



Website Pageviews

■ Goal: 1.5 Million

■ Actual: 896,586

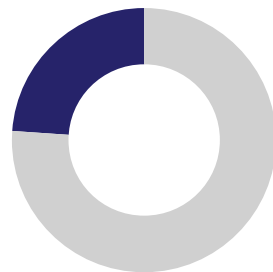


Host Travel Writers

■ Goal: 15

■ Actual: 24

■ Stretch Goal: 35



Social Media Following

■ Goal: +15%

■ Actual: +3.7

National Trends for 2021-22

- 89% of Americans plan to travel in the next six months
- Fear of COVID-19 impacting the decision to travel is 33% - a level that is higher than this summer's pre-Delta survey, but much lower than a year ago
- 26% of Americans say concerns about personal finances would greatly impact their decision to travel – the highest level of year
- 32% of Americans are choosing drive market destinations the next six months due to COVID concerns
- 56% of travelers feel safe traveling outside their community – down from 72% in June
- 47% of residents support opening up their community to visitors, down from 67% in June

*Data Collected by Longwoods International

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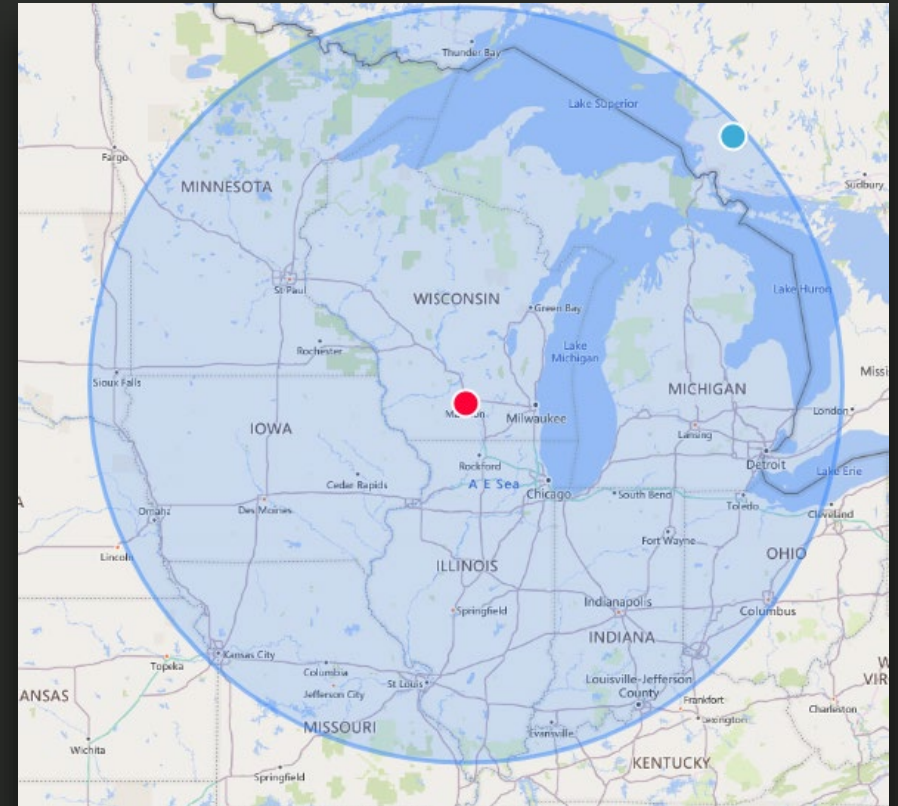
Destination Madison Recovery Campaign

Goal:

**Position Madison as the
perfect destination for
Midwest Road Trippers to
ease back into traveling.**

TARGET

Midwest Roadtrippers from WI, MN, IL,
IA, MI, IN, MO and OH who are just
starting to feel comfortable vacationing
again post-pandemic



400 MILE DRIVE RADIUS FROM MADISON, WI

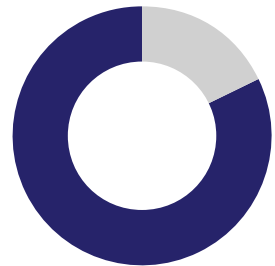
Local Ambassadors

- Our Madison Locals are a diverse group of residents with unique interests, personalities and families.
- They showcase the area's attractions in a relatable way, allowing visitors to see themselves here, and then book a trip.



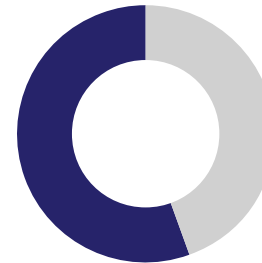
Recovery Priority #2

Pursue aggressive sales and sports plans to ensure competitive market advantage and to invigorate the economic engine those markets provide our community.



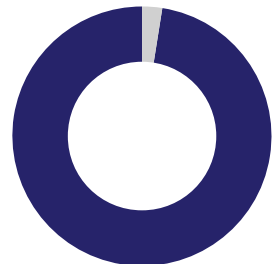
Leads Generated

■ Goal: 100
■ Actual: 82



Planner Touchpoints

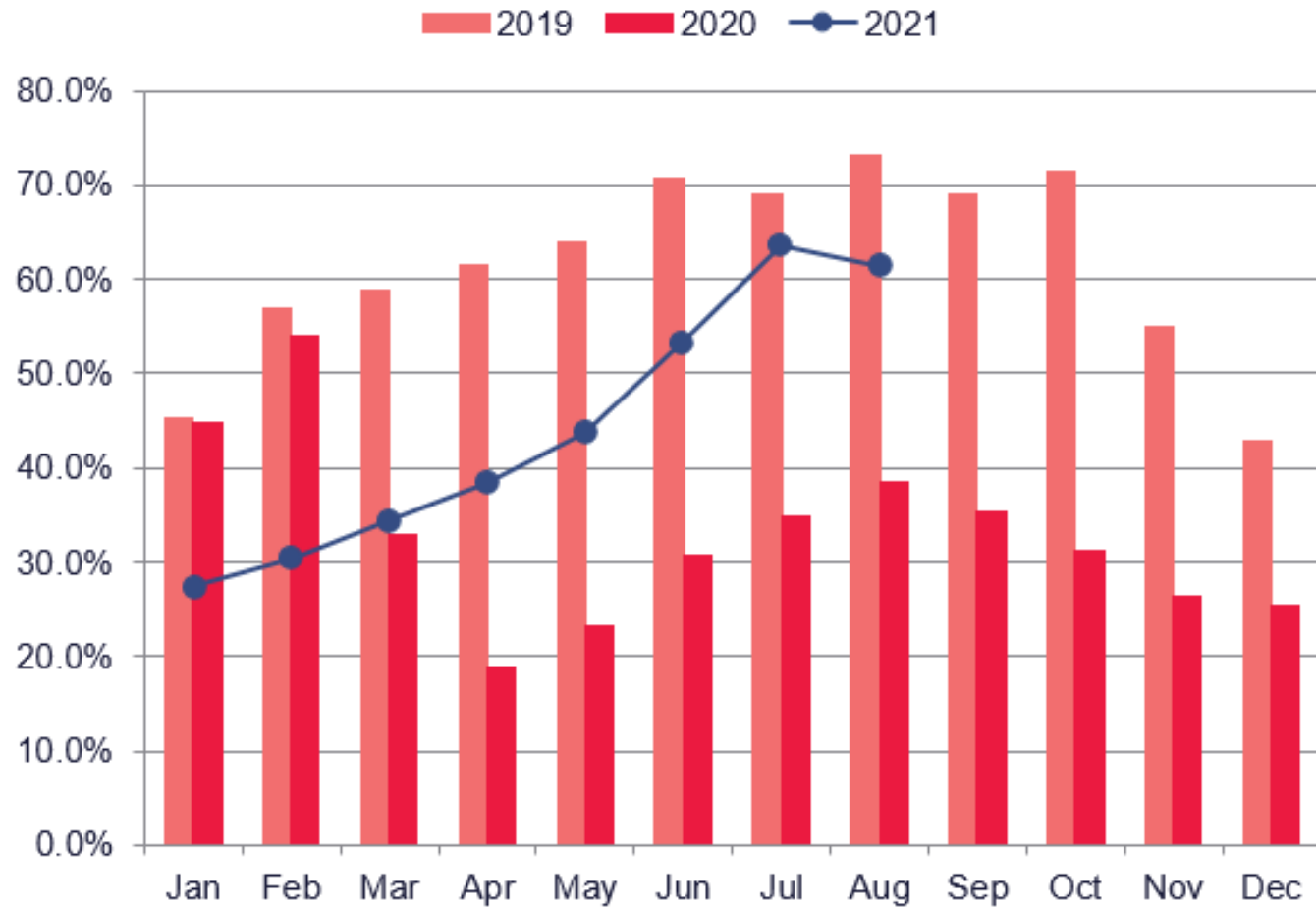
■ Goal: 2,080+
■ Actual: 1,823



Room Nights

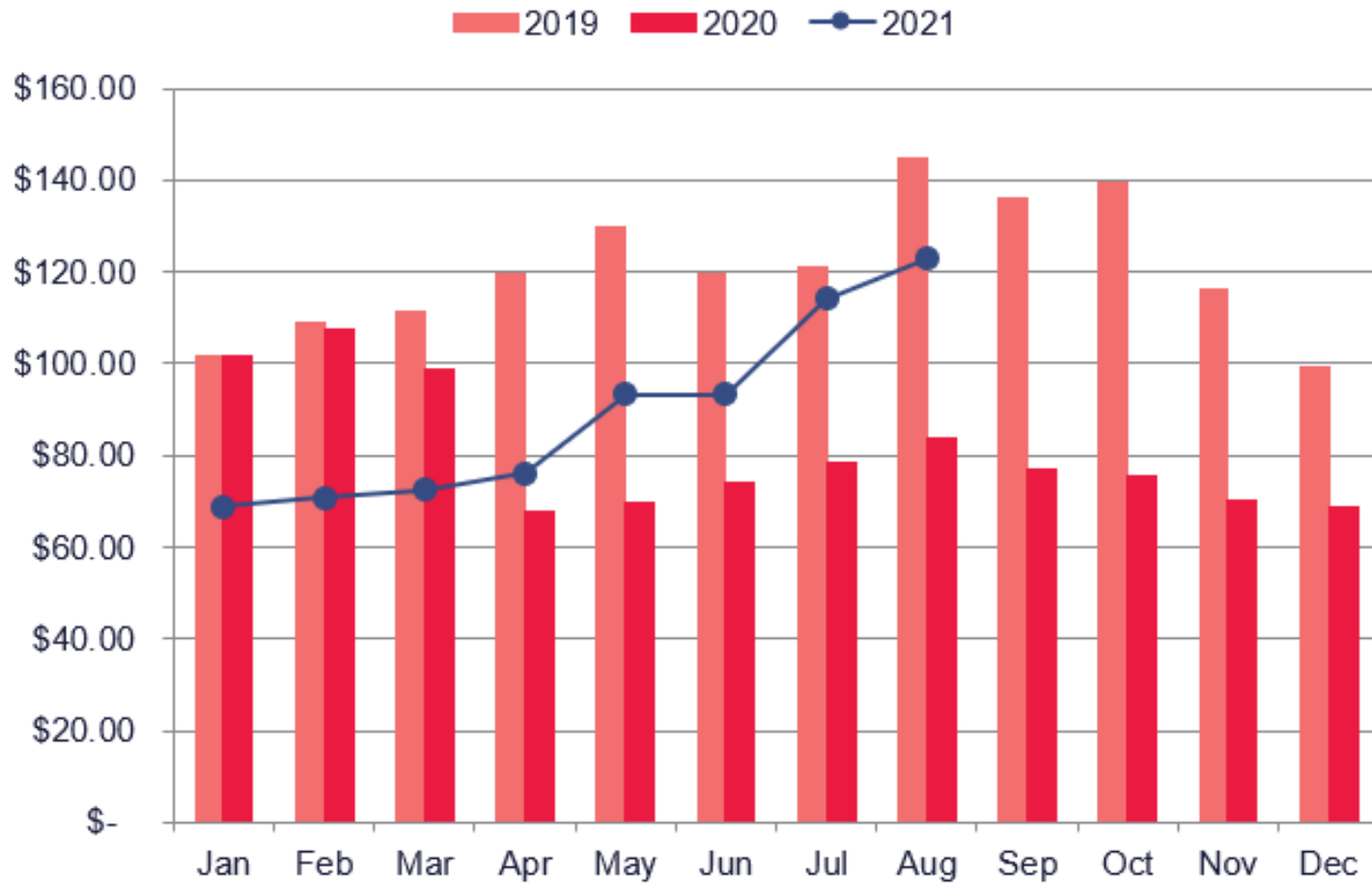
■ Goal: 54,000
■ Actual: 52,533

Hotel Occupancy



Note year over year inventory does not include COVID related closings

Hotel ADR



Note year over year does not include COVID related closings

Historical Trend with Projections

	2019	2020	2021F	2022F
Occupancy				
Madison	61.5%	31.9%	47.3%	58.9%
U.S.		44.0%	55.6%	61.8%
Average Daily Rate (ADR)				
Madison	\$122.87	\$84.30	\$104.74	\$119.27
U.S.		\$103.08	\$115.50	\$122.39
Revenue Per Available Room (Rev/PAR)				
Madison	\$75.54	\$26.86	\$49.55	\$70.31
U.S.		\$45.39	\$64.24	\$75.63
F = Forecast				

Convention & Sports Sales

January – October 2021 Activity

- Booked 43 groups
- 129,687 attendees
- 59,114 room nights
- *Direct spending = \$30,647,477
- 19 of the 43 groups were booked in the year for the year (2021)
- Conventions & Events booked out to 2028

*Approximate

PENDING BUSINESS TO CLOSE	DATE	ROOM NIGHTS
USA Curling	Mar-22	1,000
2022 Wisconsin Middle School State Championships	Mar-22	1,400
*2022 National Space & Missile Materials Symposium & Commercial and Government Responsive Access to Space Technology Exchange	June-22	1,000
*American Meteorological Society	August-22	2,900
USA Hockey	March-23	1,275
*Wisconsin Medical Society Annual Convention	Apr-23	180
*Pharmacy Society of WI Educational Conference	Apr-23	150
*Intergovernment Science-Policy Platform on Biodiversity & Ecosystem Services	May-23	4,600
*International Society for Heart Research	Jun-23	755
*Public Relations Society of America	Jun-23	800
*American Association of Motor Vehicle Administrators	Aug/Sept 23	2,300
Natl Junior College Athletic Association-2023 DII Women's Soccer Championships	Nov-23	750
Natl Junior College Athletic Association-2023 DII Men's Soccer Championships	Nov-23	750
*ASLO	Jun-24	2,800
National Junior Angus Show	Jul-24	3,200
American Truck Historical Society Annual Convention & Truck Show	Jun-25	2,100
*WCGALP	Jul-26	2,882
Total		26,442
* Monona Terrace		

Recovery Priority #3

Engage in and support Downtown's recovery and revitalization to preserve Madison's reputation as a vibrant and desirable destination.



Downtown KPIs

■ Goal: 1,500

■ Actual: 780

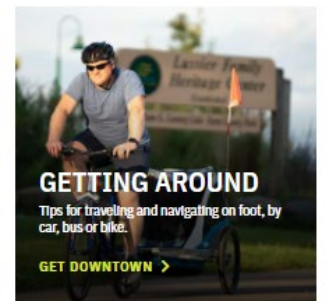
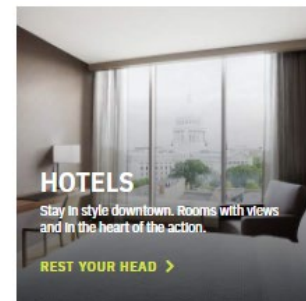
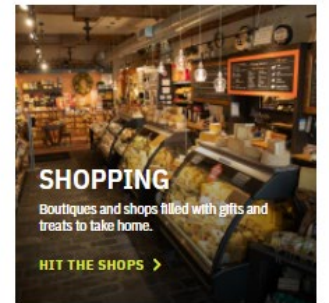
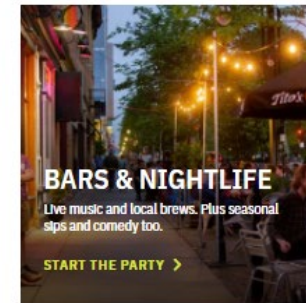
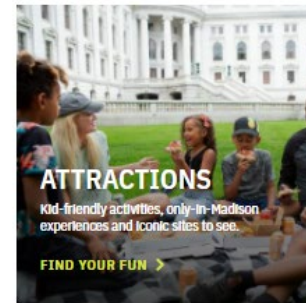
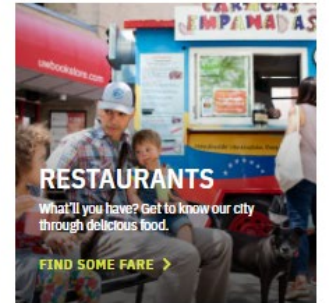
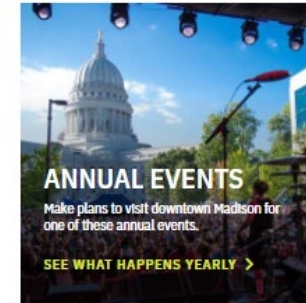
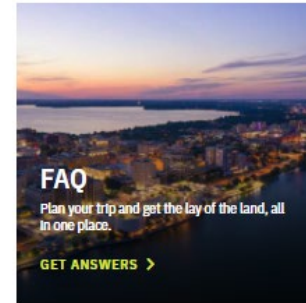
Downtown KPI Measurements:

- Dedicated Website – 200 points/**Current – 200 points**
- Dedicated collateral – 20 points each/**Current – 60 points**
- Dedicated positive stories – 20 points each/**Current – 40 points**
- Dedicated positive travel blogs – 40 points each/**Current – 160 points**
- Pedestrian increases related to events – 30 points each/**Current – 120 points**
- Promote local downtown events – 10 points each/**Current – 90 points**
- Sponsor downtown events – 40 points each/**Current – 40 points**
- Downtown Partner listings – 5 points new; .25 points non-partner /**Current – 70**
- Affect downtown policy – 50 points/**Current – 0**

Downtown Madison

visitmadison.com/downtown

- Recovery Strategy
- Drive visitation & enhance positive perceptions of downtown
- QR codes: clings, cards and kiosks
- Supported MadLit series
- EWC serving on the Downtown Madison Public Safety Initiative Advisory Committee



Recovery Priority #4

Create and foster connections between public entities, private partners and stakeholders to rebuild our economy.



Partner & Community Touchpoints

■ Goal: 2,300

■ Actual: 1,350



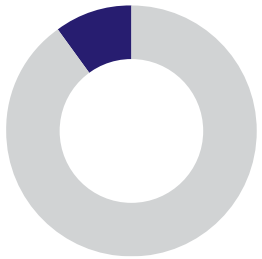
Partner Satisfaction

Partnership Activities

- Creating & Fostering Relationships
 - Meetings and Partnerships with the Latino Chamber, LGBTQ Chamber and Black Chamber
 - Collaborative meetings with Dane Buy Local, MadREP, Downtown Madison Inc., United Way and Madison Central Business Improvement District (BID)
 - Participation in YWCA Racial Justice Summit, La Movida Annual Event, LCC Hispanic Heritage Month Event
 - Outreach and conversations with local business owners
 - Enhancing Website Exposure
 - Addition of 200 Downtown Madison business listings
 - Increased exposure for Madison & Dane County Parks with addition of 50+ web listings
- 


Recovery Priority #5

Elevate and embrace Diversity Equity Accessibility Inclusion (DEAI) inside and outside the organization to design and promote a welcoming environment and physical space for residents and visitors.



Develop DEAI Advancement Roadmap for DM

Engagement

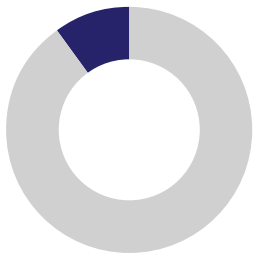
- 2-3 volunteers from the Board to serve, along with staff, on Destination Madison's DEAI Committee (one year commitment). The committee responsibilities will include: review the RFP, review proposals from interested DEAI consultants, attend presentations of potential DEAI consultant, assist with creating Destination Madison's DEAI roadmap
 - Support diverse events such as MadLit & Culture Center Pop Up Shops
 - Engagement with Music Cities initiative focused on DEAI strategies
 - Actively engage with industry DEAI efforts
 - Continued education for DM team
- 

Recovery Priority #6

Propel the recovery of Madison's tourism industry by ensuring critical funding is secured for Destination Madison, and vital regional workforce is recruited and developed for hospitality partners



City Contract in Place by Q1 2022



Implement a Workforce Development Task Force

Tourism Recovery Plan Highlights



City Contract:


Continuing meetings with Connie Thompson and Bill Zeinemann from Monona Terrace to discuss contract. Scope of Services have been approved by DM and MT. We have all agreed that performance metrics should be included in Addendum A as opposed to the contract, so we are now working on the metrics. The Monona Terrace revenue metric will align with the final report from the Optimization Study.

Workforce Development:

- Destination Madison is in the process of creating a Hospitality Workforce Attraction, Development, and Retention Pilot Program to address the dire need to fill the 30% decline in hospitality workers in the greater Madison region. The six-month program will address talent attraction and industry education and, if successful, be scaled up, expanded statewide, and translated to Spanish.
 - The program includes creating a local/regional digital marketing campaign to attract people to hospitality, including underserved populations, those affected by COVID, recent retirees, stay-at-home parents, guardians, and caretakers looking to re-enter the workforce, and youth. Destination Madison will also create a regional/national talent attraction portal to entice workers to move to the great Madison area.
 - For professional development and education, Destination Madison will partner with Madison College to develop online hospitality education modules in two tracks: service industry skills and hospitality leadership skills.
 - Applied for Workforce Initiative Grant for a Hospitality Workforce Attraction, Development, and Retention Pilot Program.

Next Steps

Vision for 2022

- Continue implementing the Recovery Plan
 - Create and implement a three-year strategic plan
 - Implement the new brand campaign (B to B and B to C)
 - Provide exceptional customer service to the 2022 meetings and events
 - Trade show attendance (sell, sell, sell!)
 - Increase number of leisure travelers to Madison/Dane County
 - Continue to increase digital followers and engagements
 - Creation and implementation of DEAI roadmap
 - Media visits with DEAI emphasis
 - Music Cities support and implementation
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Questions



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