#TourismStrong
Thank You
Coach USA
Master Mind
SMARTY PANTS

Organization Updates

destination madison

Organization Leadership Focus

- Mass Gathering and Restaurant Capacity Public Health Orders
- CARES / Relief Funding for Organization
- 2021 Funding
- 2021 Budget & Business Plan
- Dept of Tourism Funding
- City of Madison Contract Metrics
- DEI Initiatives
- MMSD Referendum
- BRT

State of the Industry

destination madison

Greater Madison Tourism Today

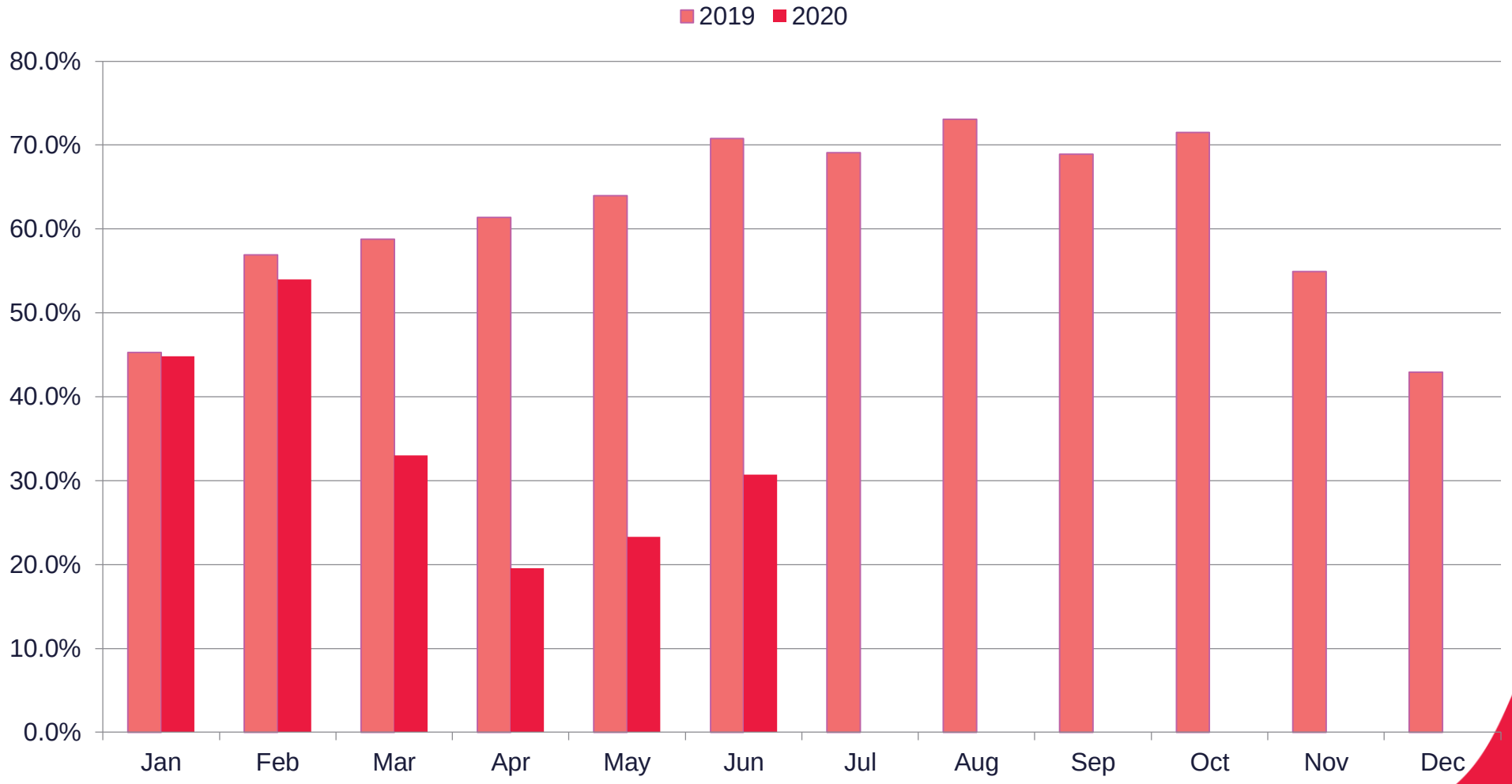
To date 81 conventions and sporting events that we contracted for* have cancelled:

Loss of **$54.5** million in direct spending
Over **105,000** hotel room nights

…And over **160,000** visitors to our destination

**does not include events, e.g., World Dairy, UW Football, etc.*

Hotel Occupancy



Note year over year inventory does not include Covid related hotel closings

Traveler Spending: US Travel

Convention Sales and Services

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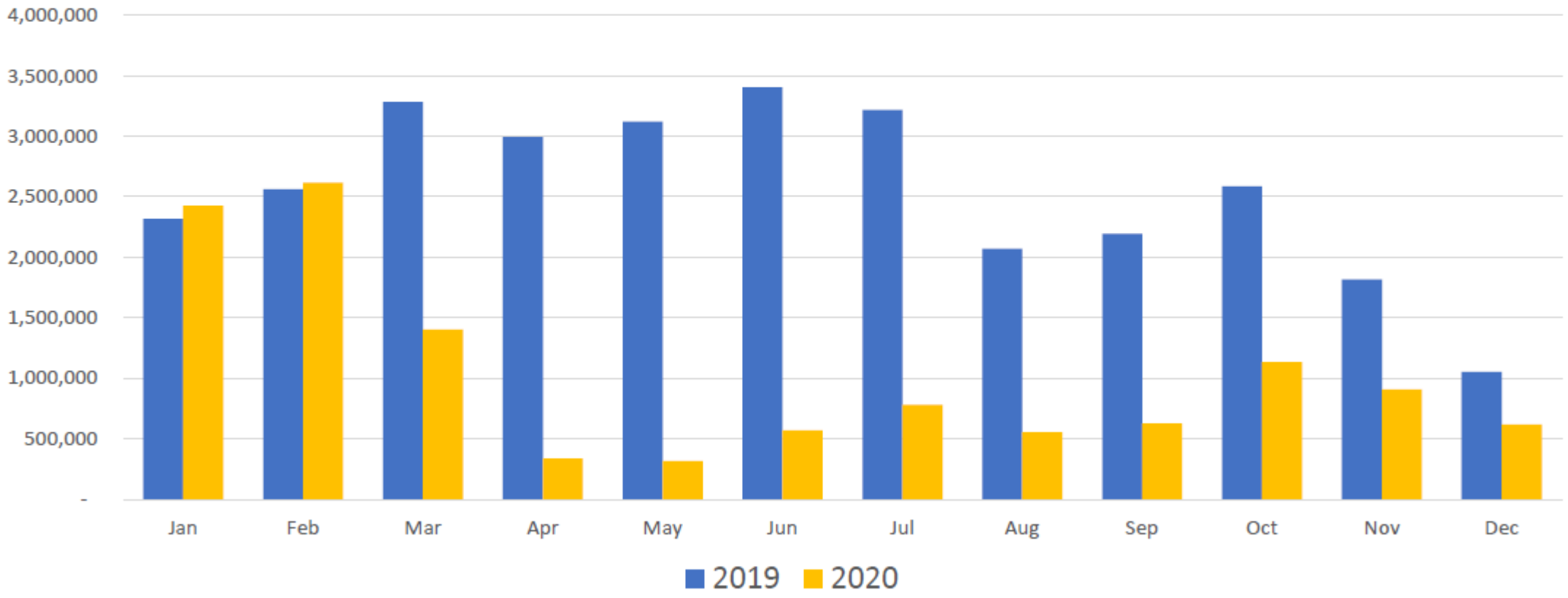
Meeting & Event Industry Realities

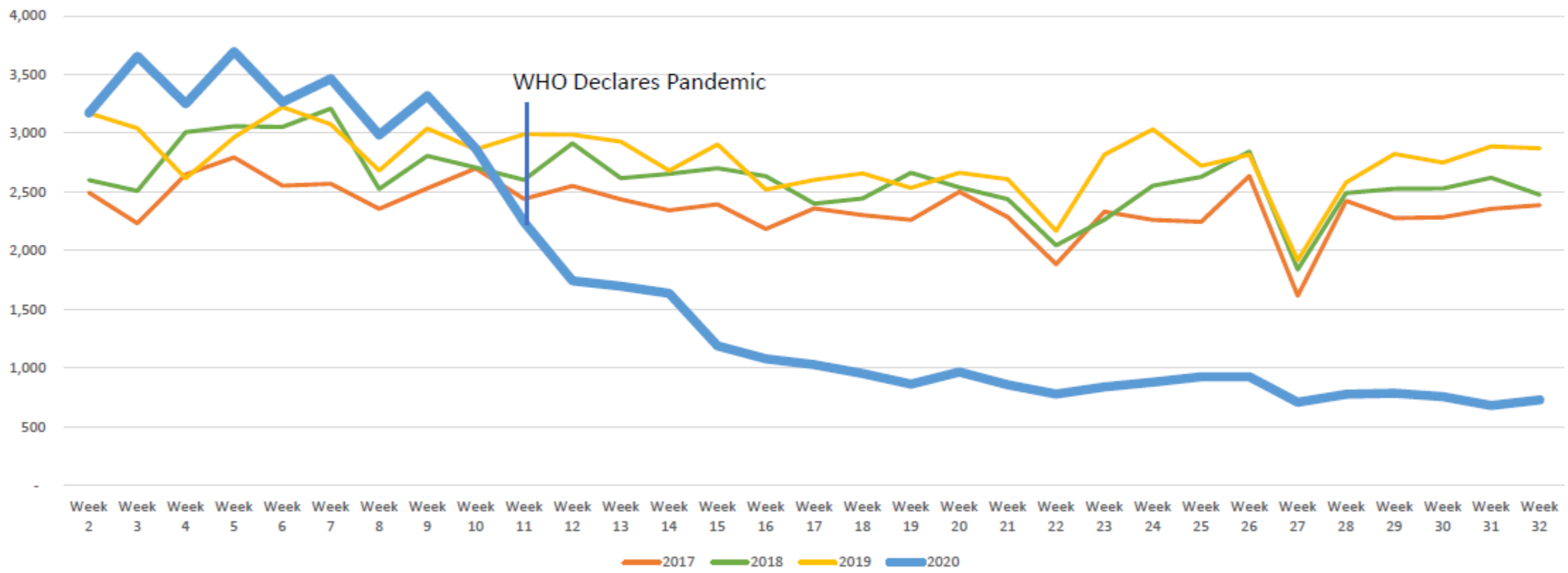
- Other cities are opening up
- Offering incentives for booking business
- Leveraging safety messaging
- Risk mitigation is a major concern
- Meeting planners are delaying decisions
- Customers not ready to talk

August 9, 2020

Reality: 18.3 million fewer room nights on the books vs. same time last year



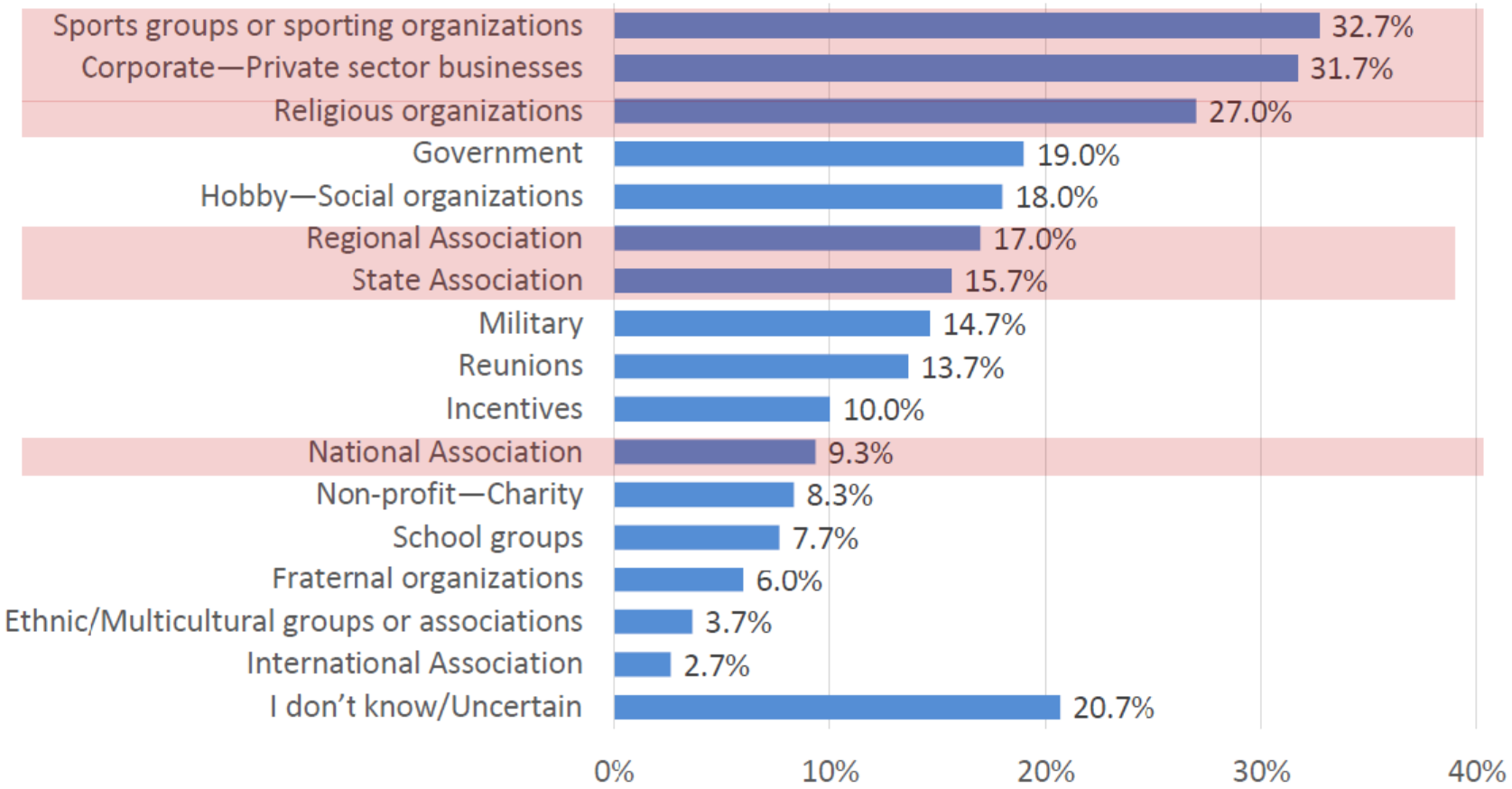
Insight: On March 11th, WHO declares novel coronavirus outbreak to be a pandemic and Lead volume for 2020 drops below past years.
New Leads created went up in Week 31 from last week which was the lowest level this year.



*Weeks are from Sunday-Saturday, hid week 1 since it normally is a partial week beginning of year
**Week 11 is March 8-14, when 2020 first drops below past years

POTENTIAL TARGETING - GROUPS WILLING TO RETURN

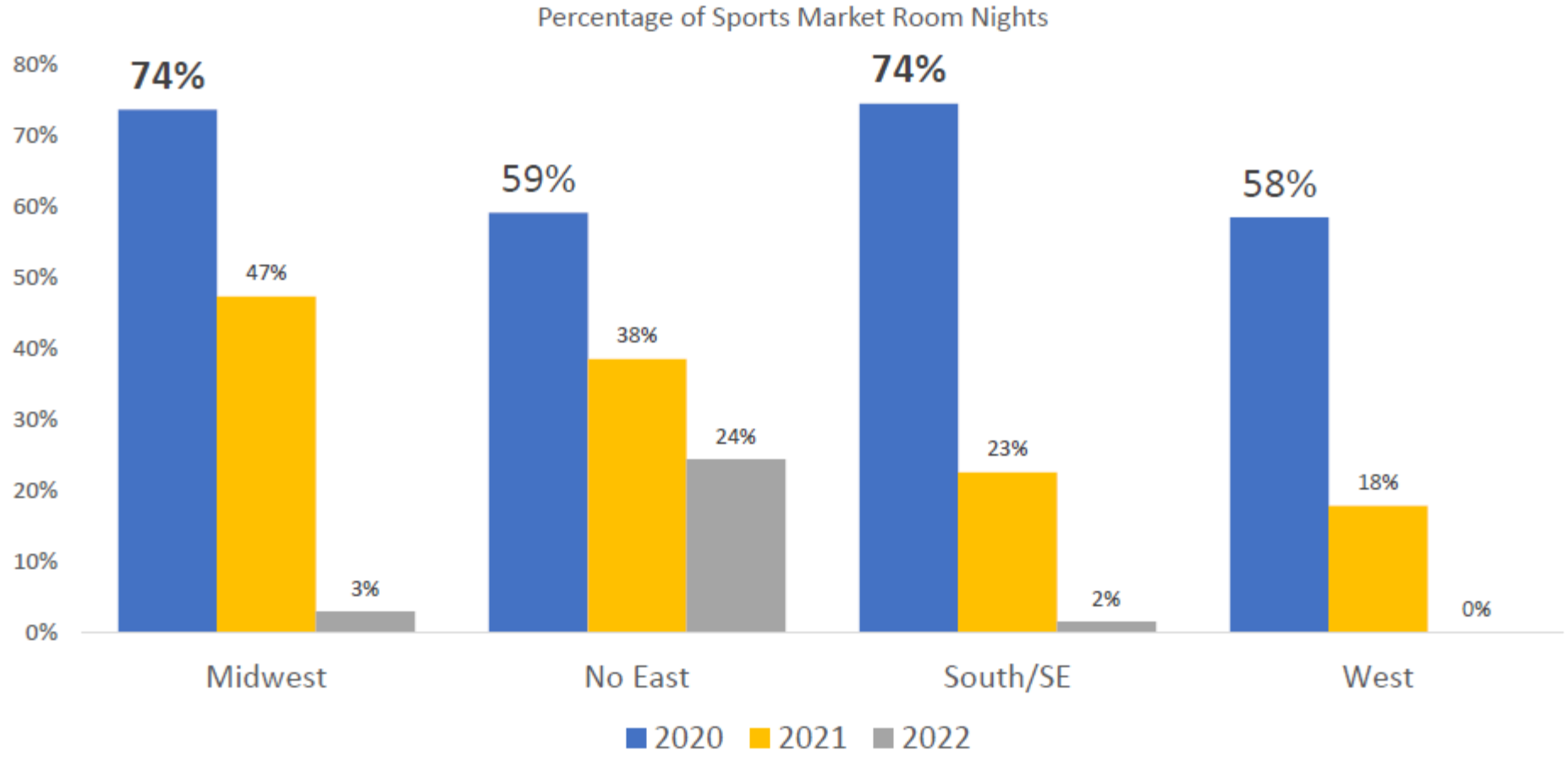
FIRST GROUPS TO RETURN TO LIVE EVENTS



Source: Destination Puerto Rico / Destination Analysts Meetings Research Study. Base: Meeting & event planners. Sample Size = 300

August 9, 2020

Hope: Midwest & South/Southeast CVB Have a High Percentage of Sports Bookings

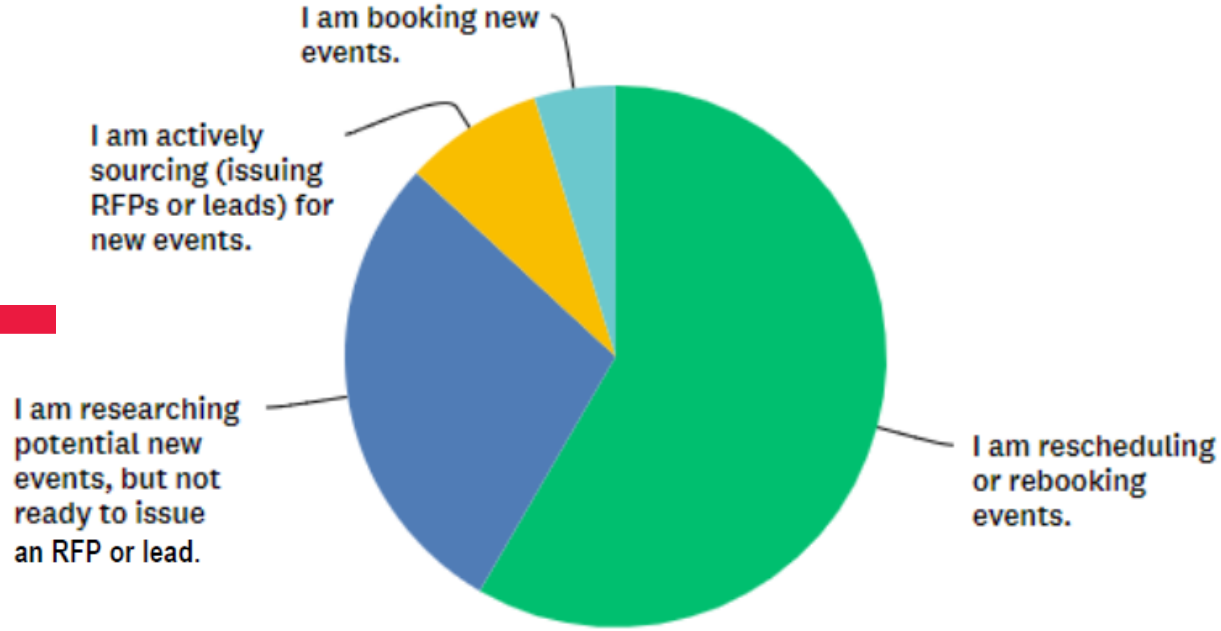


Rebooking is the Primary Focus

“Déjà vu all over again” for planners rescheduling events

July 15 Responses

ANSWER CHOICES	RESPONSES
I am rescheduling or rebooking events.	59.64%
I am researching potential new events, but not ready to issue an RFP or lead.	27.46%
I am actively sourcing (issuing RFPs or leads) for new events.	8.05%
I am booking new events.	4.85%



As of June 1, 40% were sourcing and booking future business and 35% were researching, not booking.

The Face Mask Debate?: 70% of Planners will Require *and* Supply Them

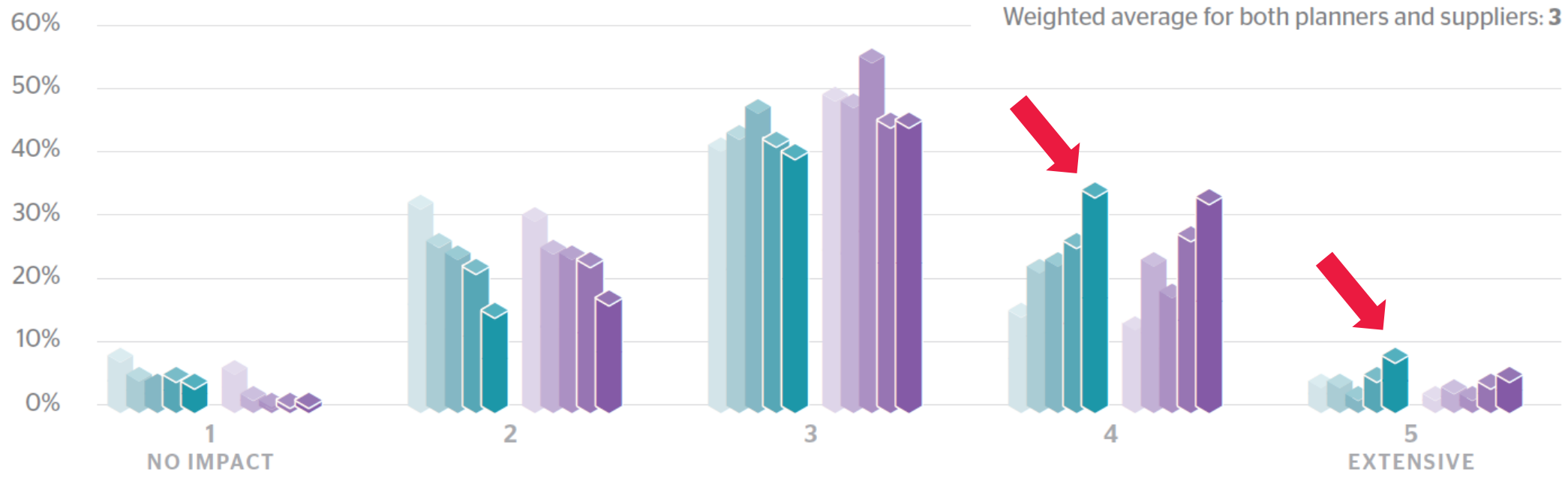
Are you considering any of the following in the planning of future events?

July 15 Responses

ANSWER CHOICES	RESPONSES
Reducing and managing crowd densities	77.40%
Developing meeting room designs to encourage physical distancing	83.71%
Putting into place social responsibility best practices, including protocols for attendees who are ill	83.33%
Providing signage regarding prevention and control measures (shaking hands, washing hands, etc.)	82.70%
Providing temperature/health screening	57.20%
Providing hand sanitizer on-site for staff and attendees	91.16%
Providing virtual alternatives concurrently with physical events	73.74%
Requiring liability waivers as a condition of attendance	56.44%
Requiring face masks as a condition of attendance	70.08%
Supplying face masks for attendees	72.10%

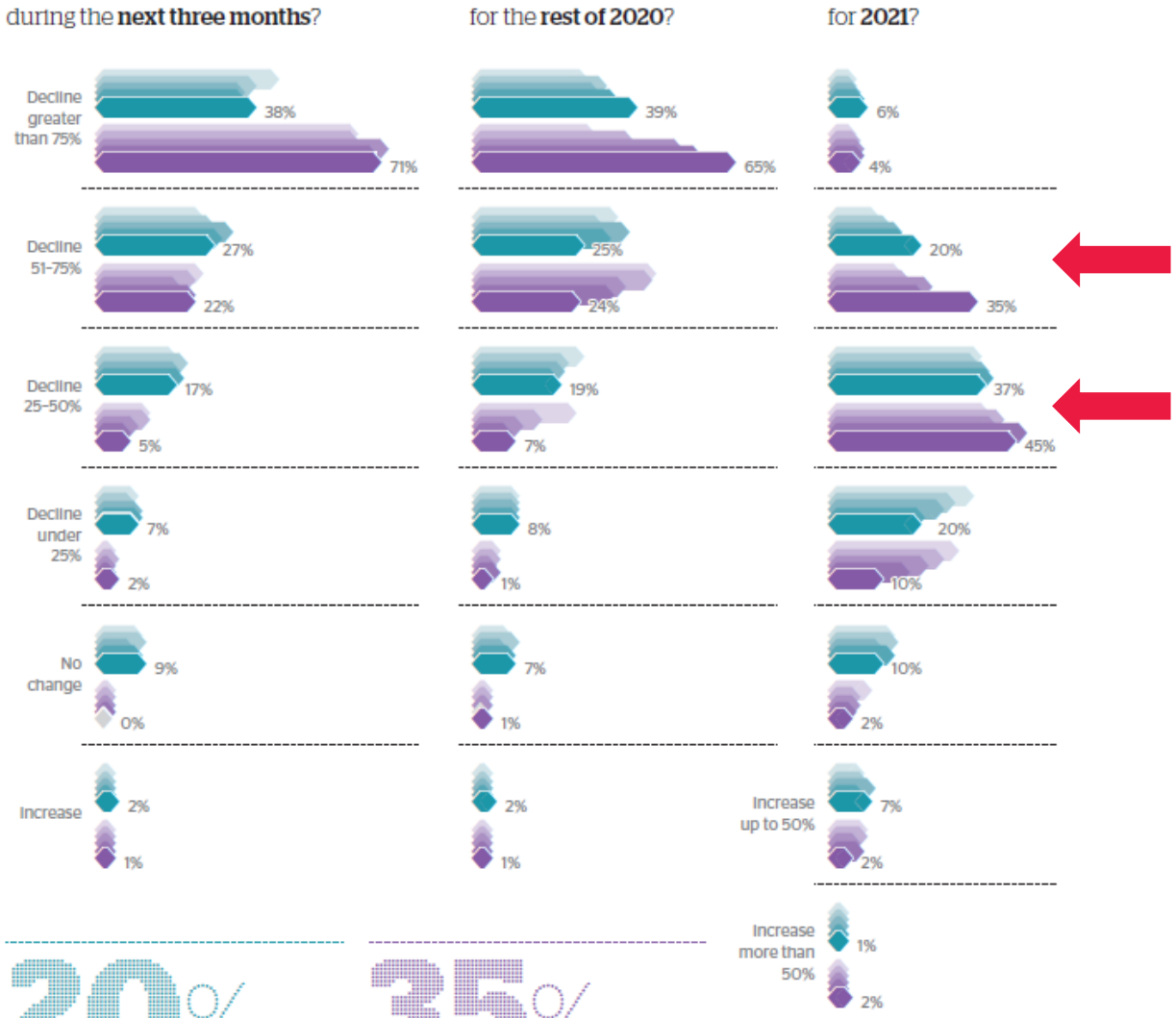
Industry Engagement & Recovery Strategies

To what extent do you believe the rise in the use of digital-event technology will cannibalize face-to-face event attendance at events **in 2021** on a scale of 1 to 5.



	APR 20-23	MAY 4-7	MAY 18-21	JUN 15-18	JUL 13-16
PLANNER TRACK	APR 20-23	MAY 4-7	MAY 18-21	JUN 15-18	JUL 13-16
SUPPLIER TRACK	APR 20-23	MAY 4-7	MAY 18-21	JUN 15-18	JUL 13-16

What do you believe will be the overall revenue impact of COVID-19 on your events-related business ...



20%

OF PLANNERS, VS. 16% IN LAST MONTH'S SURVEY, EXPECT A 51-75% DECLINE IN REVENUES IN 2021, AND SLIGHTLY MORE THIS MONTH SAY THE SHORT-TERM DECLINE WILL BE GREATER THAN 75%,

35%

OF SUPPLIERS, VS. 21% IN LAST MONTH'S SURVEY, EXPECT A 51-75% DECINE IN REVENUES IN 2021, AND 9% MORE THIS MONTH SAY THE DECLINE FOR THE REST OF 2020 WILL BE GREATER THAN 75%.

Please rate how likely each of the below are to influence you to book a venue or event space for your meeting or event in a post-coronavirus environment.

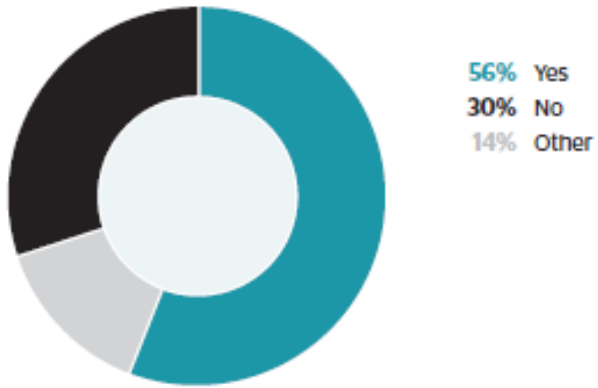
	EXTREMELY LIKELY	MODERATELY LIKELY
ADHERENCE TO GOVERNMENT SAFETY RULES AND REGULATIONS	78.74%	
CLEAR RULES AND GUIDELINES AROUND SAFETY AND CLEANLINESS	77.36%	
LARGE SPACIOUS MEETING ROOMS THAT ALLOW FOR DISTANCING	75.98%	
PROVIDES CLEAR SAFETY VETTING FOR ALL VENDORS (FOOD, ELECTRICITY, SPONSORS, ETC.)	69.51%	
PROFESSIONAL AND TRUSTWORTHY ON-SITE STAFF	67.81%	
OVERALL CAPACITY	62.37%	
IS A HOTEL THAT CAN HOST BOTH THE EVENT AND PROVIDE OVERNIGHT ACCOMMODATIONS	54.27%	
GIVES THE OPTION FOR VIRTUAL INTERACTION AS NEEDED	51.05%	
IS A VENUE I'VE WORKED WITH IN THE PAST	35.93%	
EASY TO ACCESS BY CAR	35.48%	
NUMBER OF SMALLER, SEPARATED MEETING ROOMS	35.03%	
LOCATED WITHIN AN AREA THAT HAS A LOT TO DO		34.93%
HAS ON-SITE HEALTH TEAMS	34.13%	
HAS DISCOUNTED RATES	33.48%	
ABILITY TO HOST DINNERS OR EVENTS AFTER HOURS		29.79%

PCMA CONVENE

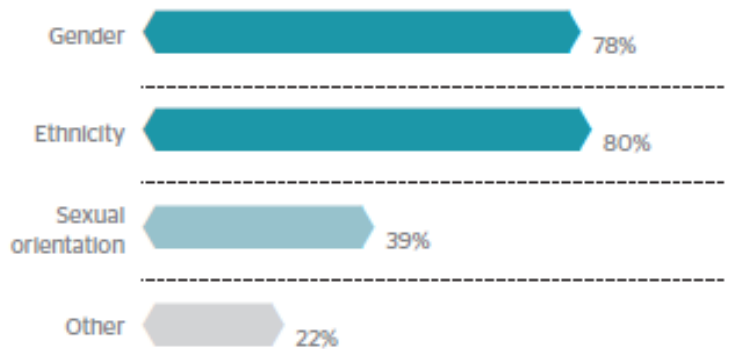
COVID-19 SURVEY

PLANNER TRACK

Do you set diversity goals when procuring speakers for events, including virtual events?



If you do set diversity goals when procuring speakers for events, do they include any or all of the following? (Click all that apply.)



Industry Engagement & Recovery Strategies

- GBAC Star Facility - Global Biorisk Advisory Council
- ISSA—The Worldwide Cleaning Industry Association
- Facility Accreditation Program Gains Ground in 30 Countries Worldwide
- Baltimore, Columbus, Palm Beaches, Dallas – airports, meeting venues, hotels, restaurants, museums, attractions, and public transportation
- Monona Terrace, Alliant Energy Center and Concourse are pursuing

GBAC STAR™ Facility Accreditation

The cleaning industry's only outbreak prevention, response and recovery accreditation for facilities.

Is your facility prepared to reopen?

By earning **GBAC STAR™** accreditation from the **Global Biorisk Advisory Council (GBAC), a Division of ISSA**, you can instill confidence in your customers, staff and key stakeholders that your facility has the proper cleaning, disinfection and infectious disease prevention systems in place.

GBAC STAR is a performance-based accreditation program that helps facilities demonstrate they have the work practices, procedures and protocols to prepare, respond, and recover from outbreaks and pandemics.

"Working with GBAC ensures compliance with critical guidelines for the highest standard of cleanliness and it is our hope that other venues will follow suit as we navigate through these unprecedented times."

– Tom Garfinkel, Vice Chairman and CEO, Miami Dolphins and Hard Rock Stadium—the first public facility to pursue GBAC STAR.

GBAC STAR is an annual accreditation designed for any size facility, including:

- Stadiums and Arenas
- Convention Centers
- Retail Spaces
- Commercial Offices
- Daycares
- Schools
- Assisted Care Facilities
- Hotels
- Veterinary Clinics
- Restaurants
- Spas
- Athletic and Fitness Clubs
- Transportation Hubs
- Churches & Religious Buildings
- Grocery Stores
- Doctors' Offices

Reopen your facility with confidence with GBAC STAR. Get started at gbac.org

PROGRAM ELEMENTS

Accredited facilities will comply with the program's 20 elements:

1. Organizational Roles, Responsibilities & Authorities
2. Facility Commitment Statement
3. Sustainability & Continuous Improvement
4. Conformity & Compliance
5. Goals, Objectives & Targets
6. Program Controls & Monitoring
7. Risk Assessment & Mitigation Strategies
8. Standard Operating Procedures (SOPs)
9. Tools & Equipment
10. Cleaning & Disinfection Chemicals
11. Inventory Control & Management.
12. Personal Protective Equipment (PPE)
13. Waste Management
14. Personnel Training & Competency
15. Emergency Preparedness & Response
16. Facility Infectious Disease Prevention Practices
17. Worker Health Program
18. Audits & Inspections
19. Control of Suppliers
20. Documentation Management.

Contact: gbacsales@issa.com | www.gbac.org

Industry Engagement & Recovery Strategies

- Destination Meetings Industry Positioning
  - Risk management and mitigation – attrition and Force Majeure
  - Protecting for the safety and comfort of attendees – GBAC Certification
  - Virtual hybrid meeting attendance – Mediasite, PC Nametag and possibly Omnipress partnership

- Create a collaborative small meetings campaign (when orders allow)
  - Sales blitzes (Local/Statewide) integrated with each hotel/facility sales staffs
  - “Keep Your Meeting” Home messaging

Industry Engagement & Recovery Strategies

- Deployment/Sales Focus
  - Shifted production goals to activity and relationship development goals
  - 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
    - PCMA Focus Group
    - Talley Management Group Partnership – (4) virtual events for DC and Chicago clients, 2 more planned by year-end
    - Three City Alliance virtual event Sept 1
    - Two more Madison Virtual Experiences by year-end similar to May's cheese experience
  - Bring Your Meeting Home – Campus Connection

Site Visits During COVID-19

- Gauge client preferences and comfort levels in advance
- Provide safety and sanitation SOPs
- Provide hotel and venue protocols
- Ensure and provide real Madison experience
- “Very thorough and a modern take on the site visit checklist prior to arrival. Madison is ahead of the curve on this in my opinion”.
- “I love this….it’s clear and concise and the choices are excellent. I applaud that you have anyone doing a site sign a waiver saying if they get Covid you cannot be held responsible.”

Brand

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Marketing

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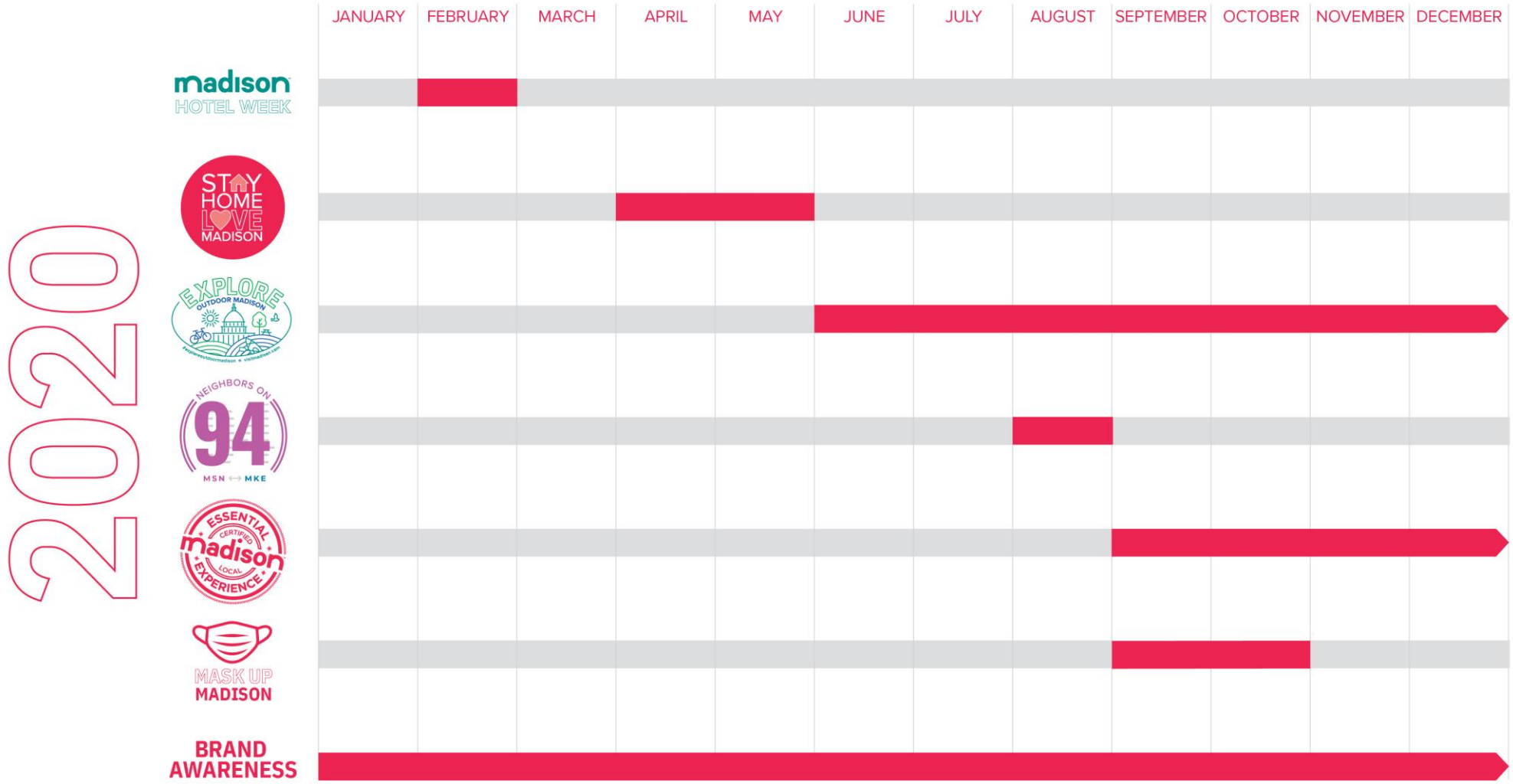
2020 Brand Campaigns



Explore Outdoor Madison

Explore Outdoor Madison on the Lakes

Explore Outdoor Madison - Hit the Trails

Explore Outdoor Madison - Picnics

EXPLORE OUTDOOR MADISON

#exploreoutdoormadison * visitmadison.com

TRAILS PICNICS LAKES GREEN SPACES

- 12 Iconic Adventures
- In Partnership with Middleton, Verona, Fitchburg, Sun Prairie
- Emphasis on content
- Video Docuseries
- Eat Street Partnership

TOP PERFORMING CITIES

1. Madison

2. Chicago

3. Milwaukee

TOTAL WEB PAGE VIEWS

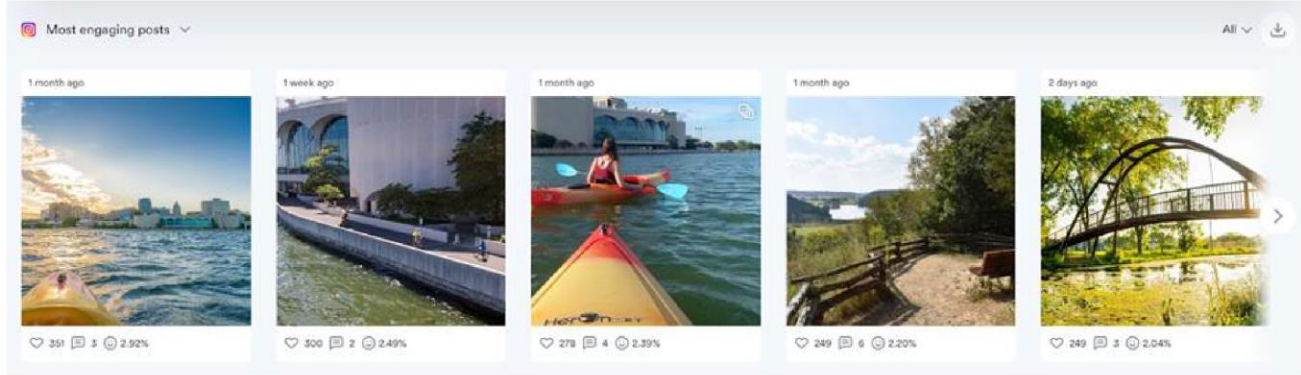
13,773

IMPRESSIONS

Paid Ads: **1,770,163**

Instagram (organic): **177,494**

Facebook Reach (organic): **78,561**



*Metrics Report from June 19 – August 10

Visitor Experiences

destination madison

Essential Madison Experience

experiencemsn.com

Visiting Madison During COVID-19

visitmadison.com/reopening

IS MADISON OPEN FOR VISITORS?

Yes, visitors are welcome in Madison. Just remember to bring a mask.

ARE WISCONSIN'S BORDERS OPEN?

Yes, Wisconsin's borders are open. Please note that Chicago visitors will be asked to self-quarantine for 14 days upon re-entering Chicago.

ARE FACE COVERINGS REQUIRED IN MADISON?

Yes, face masks or coverings are required indoors for people aged five and over in Madison, and throughout all of Wisconsin.

The face-covering must cover the nose and mouth when in public, which includes in businesses, health care settings, waiting in line and on public transportation, or in a taxi or ride-sharing vehicle. A Dane County order went into effect on July 13, 2020. Learn more about the Dane County mask policy. A state-wide order went into effect on August 1, 2020.

WHAT ARE THE COVID-19 CASE NUMBERS LIKE IN DANE COUNTY?

New data is released each day. Check out this helpful dashboard that allows you to view data using a variety of filters.

WHERE CAN I GET TESTED FOR COVID-19 IN MADISON?

Free testing is available on-site at Alliant Energy Center, Mondays through Saturdays.

RESTAURANTS

HOTELS

SHOPPING & ATTRACTIONS

Thank you!

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