

Destination Madison Update

Monona Terrace Board of Directors
February 18, 2021

Introductions: Ellie Westman Chin

Industry

Current Priorities

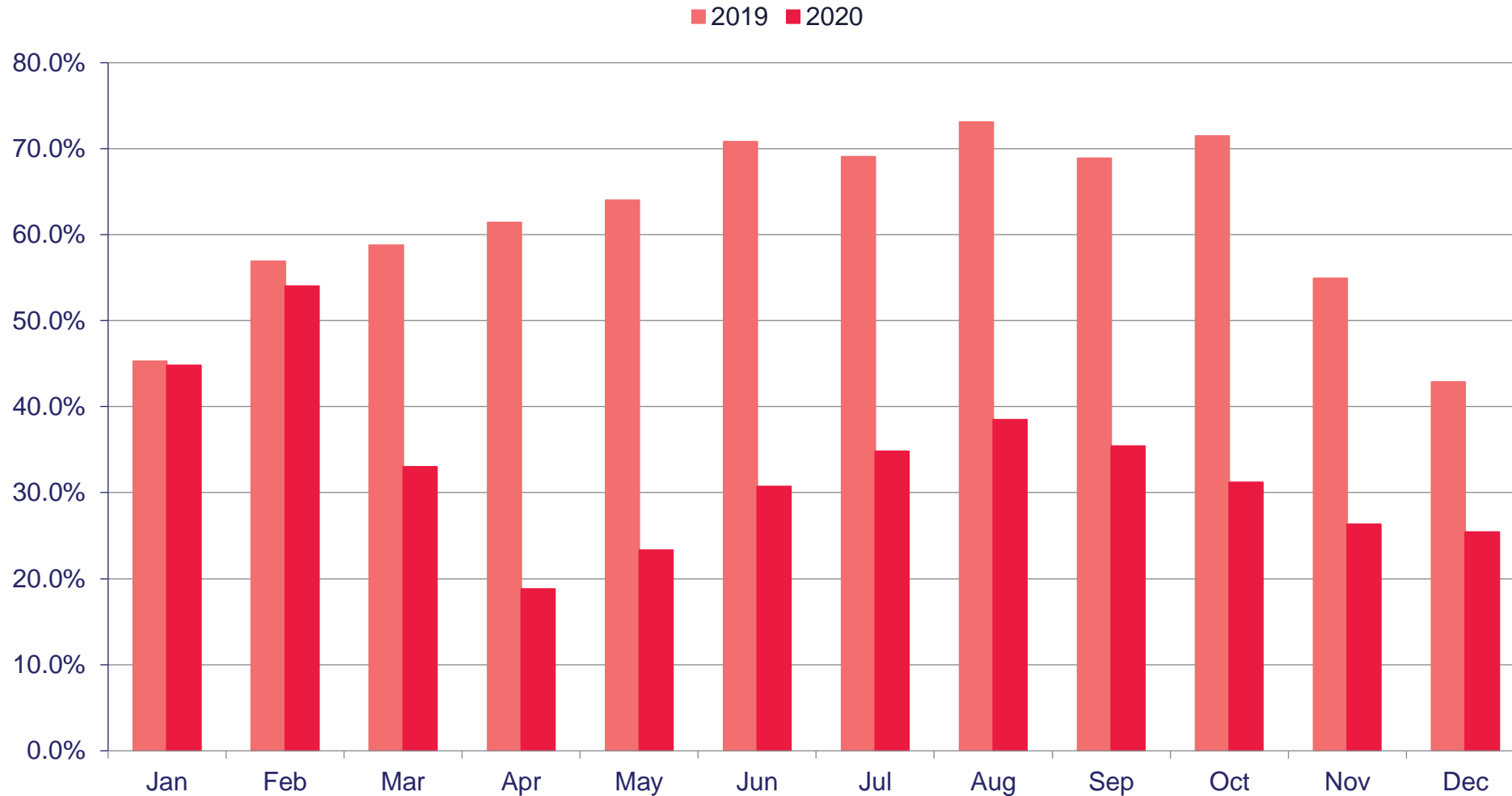
Industry Recovery

- Public Health Madison Dane County engagement
- Reputation Management
- Resident Sentiment
- Safety

Organization Viability

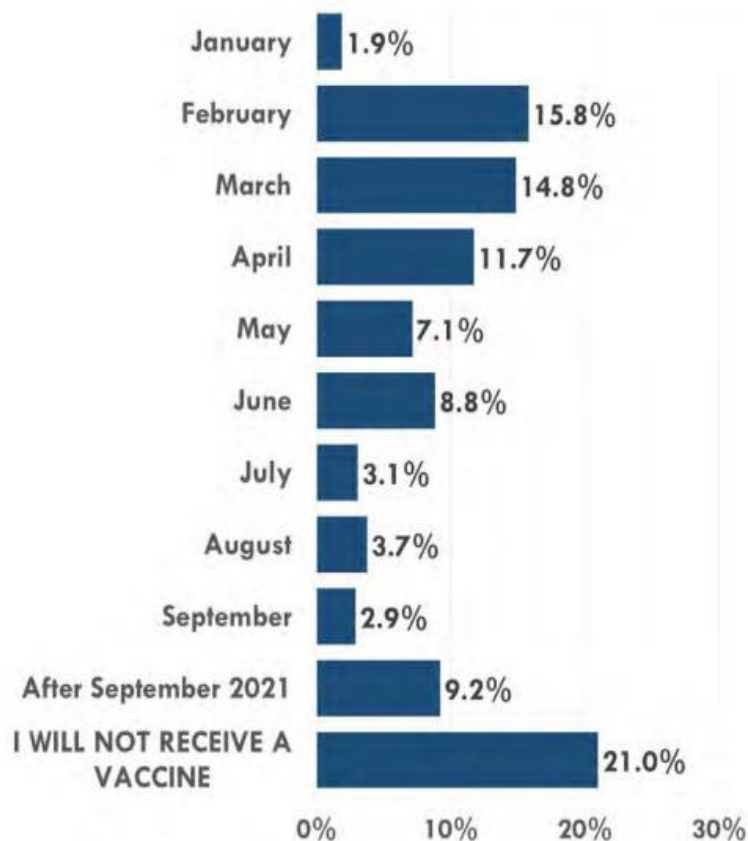
- New President & CEO
- Securing grant and Cares Act funding
- Managing staff and programs to support industry recovery
- Continuing DEI initiatives

Hotel Occupancy



Note year over year inventory does not include Covid related closings

WHEN AMERICAN TRAVELERS EXPECT TO BE VACCINATED AS OF JANUARY 17TH



EXPECTED VACCINATION BY JUNE 2021

BY GENERATION:

Millennials/Gen Z: 52.7%
Gen X: 56.5%
Boomers: 68.6%

BY REGION:

West: 66.9%
Midwest: 61.3%
Northeast: 62.8%
South: 54.3%

QUESTION: GIVEN WHAT YOU KNOW NOW, IN WHICH MONTH DO YOU EXPECT TO RECEIVE A VACCINE? (SELECT ONE)

(IF YOU ARE UNCERTAIN, SELECT THE MONTH YOU THINK IT IS MOST LIKELY YOU WILL GET A VACCINATION)

Assumptions: Baseline

- 2021 Q1
 - Difficult start to year. Concerted efforts to **get disease under control**
 - Vaccine distribution accelerates in earnest
- 2021 Q2
 - Vaccination programs make a meaningful impact
 - Through ramp-up of vaccination programs, compliance with public health guidance, and improved testing, disease prevalence declines, immunity rises, and cases decline
 - Assume by the **end of 2021 Q2, Covid-19 infection rates are low**
 - **Leisure travel picks up headed into summer**
- 2021 Q3
 - Post-Labor Day, context for business travel and group events has normalized substantially. **Corporate travel restrictions are eased. Group events are permitted in most areas**, though certain restrictions continue.
 - With US perceived as substantially “safe from COVID”, group and business travel returns strongly (**group demand recovering to about 20%-30% below 2019 levels in 2021 Q4**)

Convention Sales



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



Industry Engagement & Recovery Strategies

- **Destination Meetings Industry Positioning**
 - Risk management and mitigation – attrition and Force Majeure
 - Protecting the safety and comfort of attendees
 - Partnering with others to deliver virtual and hybrid meetings
- **Create a collaborative small meetings campaign**
 - “Keep Your Meeting” Home messaging
- **Deployment/Sales Focus**
 - Focus on relationship development goals
 - Think regionally: State and Regional meetings
 - Assist clients with rebooking and repositioning
 - Build the pipeline for future
 - Connect with planners through virtual experiences
 - Build out the Campus Connection

2020 and 2021 Group Cancel Review

2020

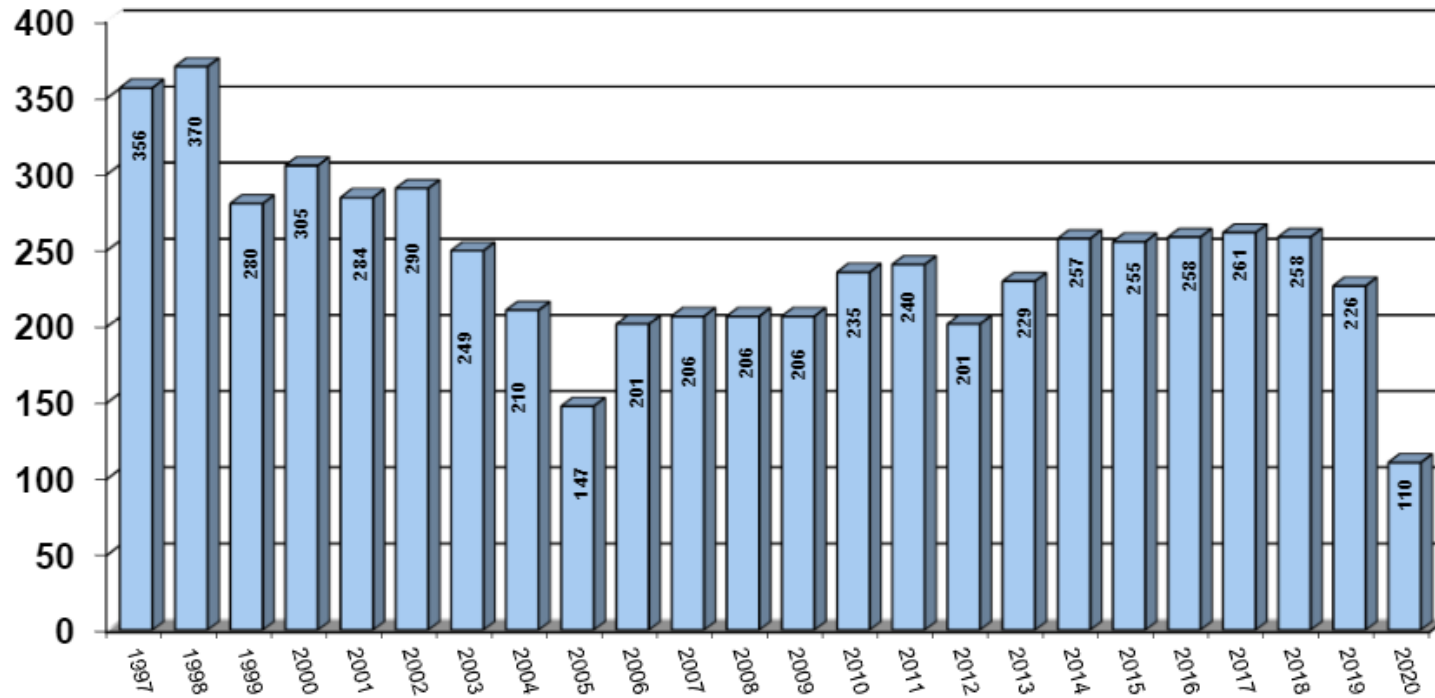
- 2020 started with 97 events and a direct spending impact of \$60,355,258
- 93 events cancelled with a direct spending impact of \$56,411,548

2021

- 2021 started with 54 events and a direct spending impact of \$28,844,944
 - On the books to Occur in 2021
 - Q2 – 14 Events. With EEI of \$6,504,671
 - Q3 – 13 Events. With EEI of \$15,156,499
 - Q4 – 10 Events. With EEI of \$3,164,350
 - Cancelled that were to occur in 2021 as of 2/3/21 - # of Events = 17. With EEI of \$4,019,424.
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- A large, solid red, irregular shape located in the bottom right corner of the slide, resembling a stylized cloud or a splash of paint.

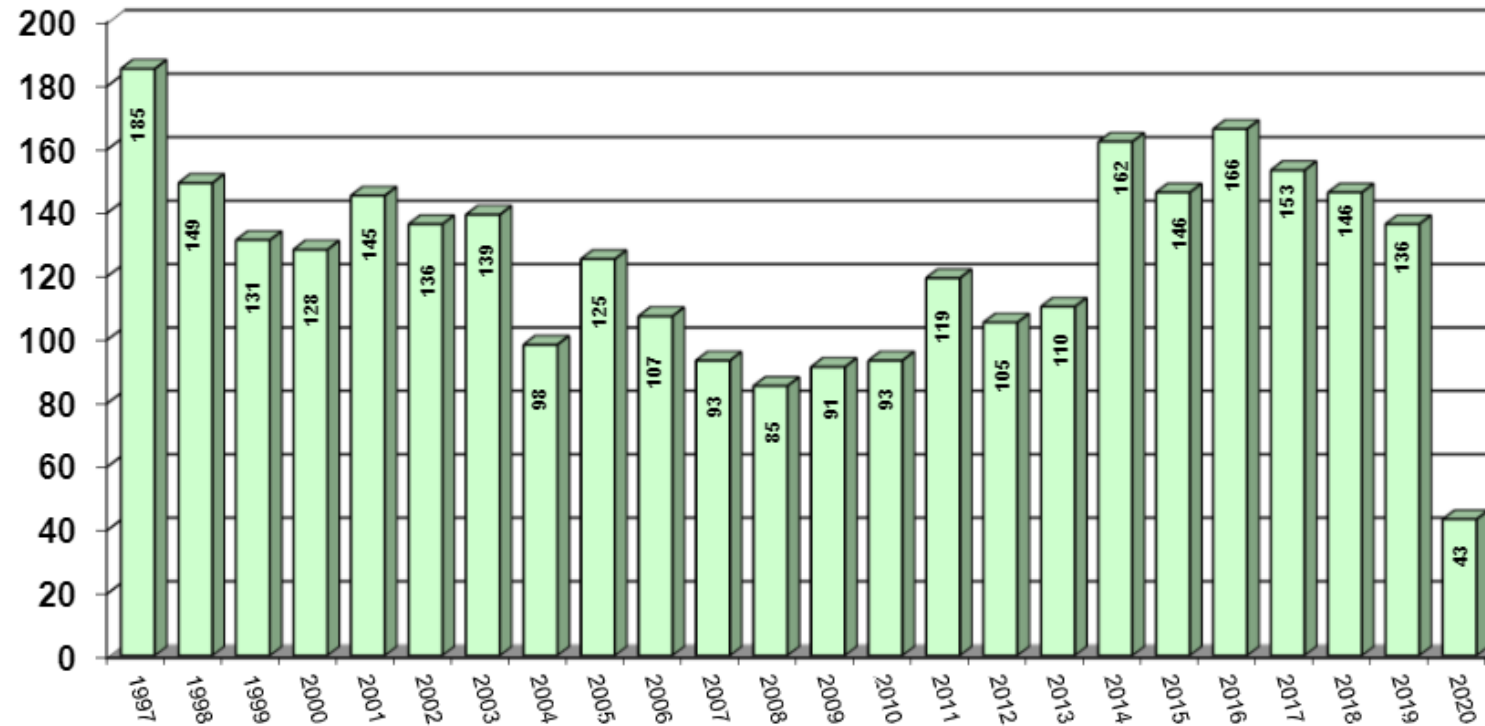
2020 Production Results – Leads Created

Destination Madison Sales & MASC Sales
Leads per Year



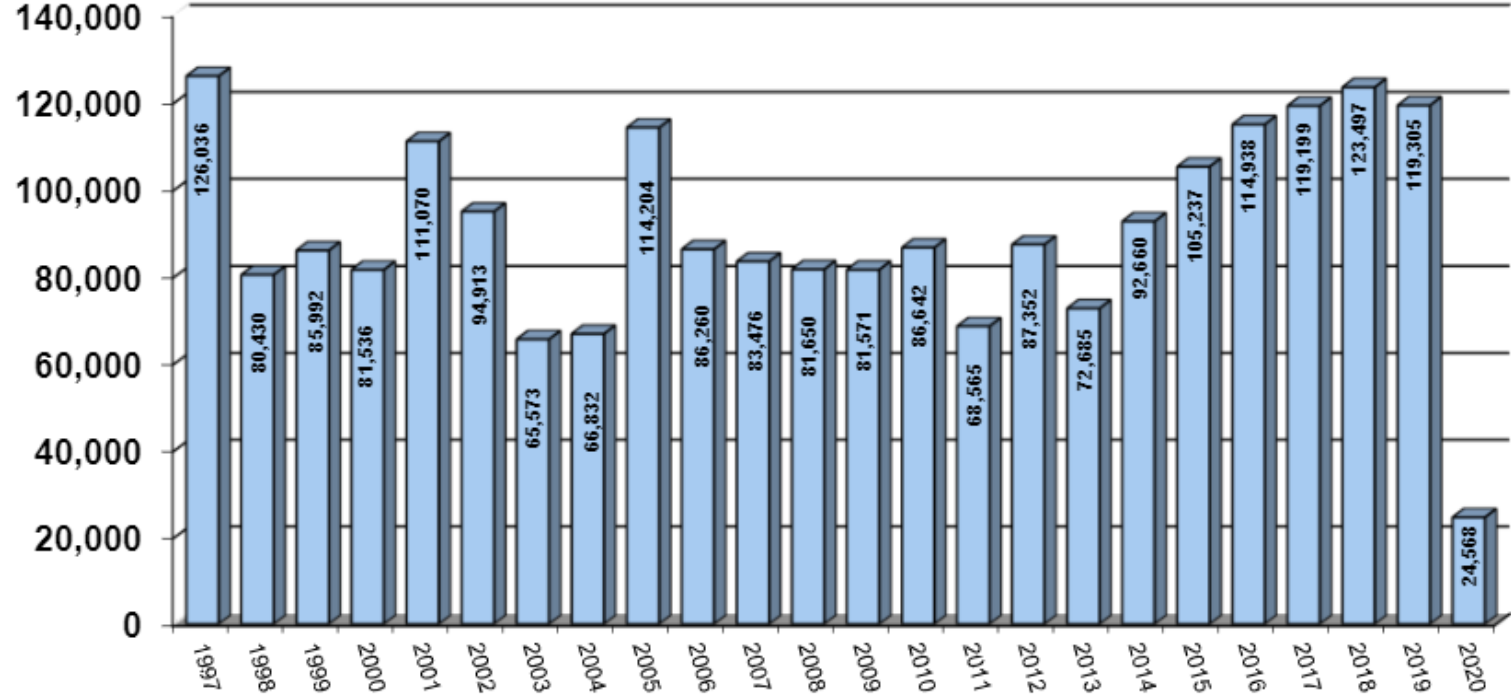
2020 Production Results – Confirmed Events

Destination Madison Sales & MASC Sales
Confirmed Events per Year



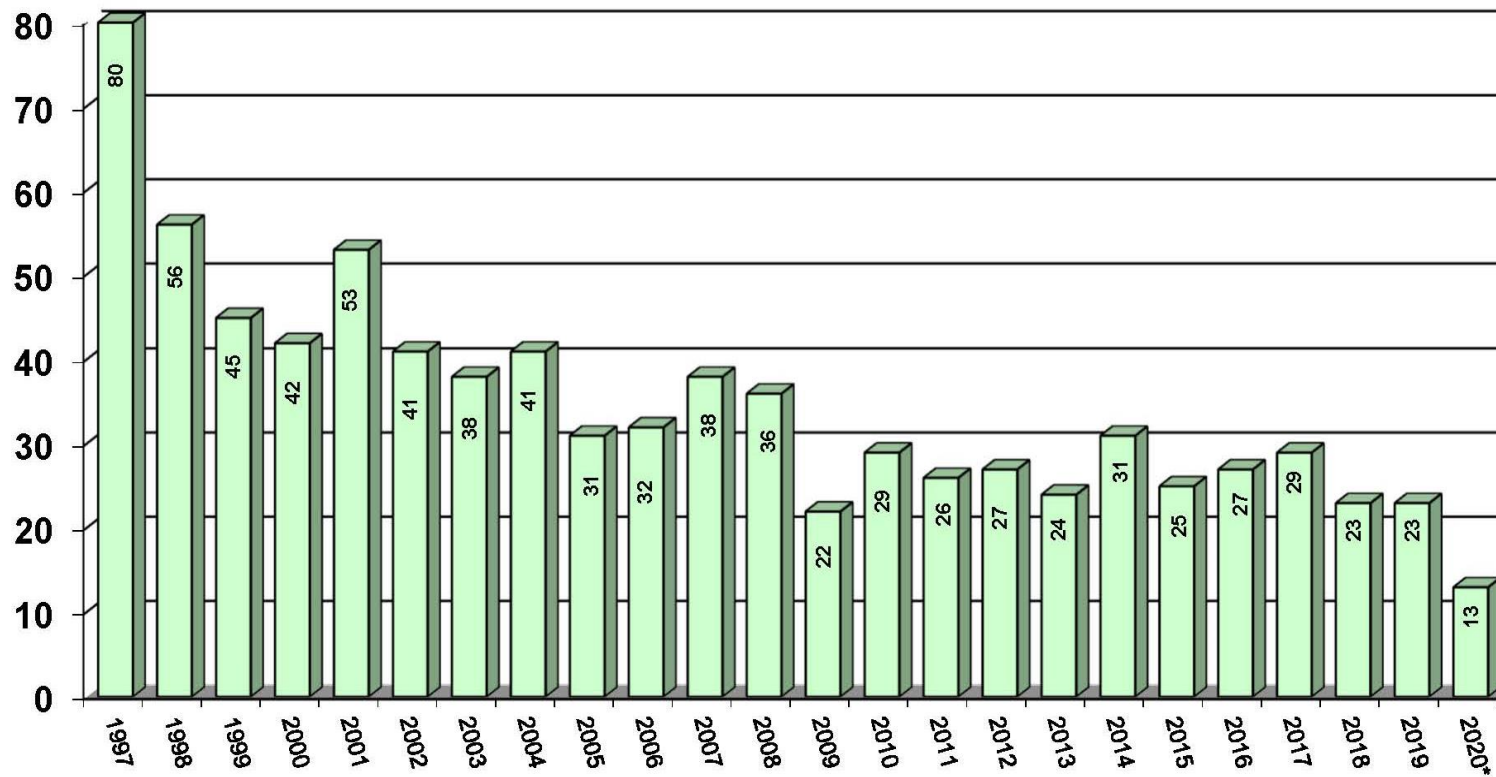
2020 Production Results – Room Nights

Destination Madison Sales & MASC Sales
Confirmed Event Room Nights per Year



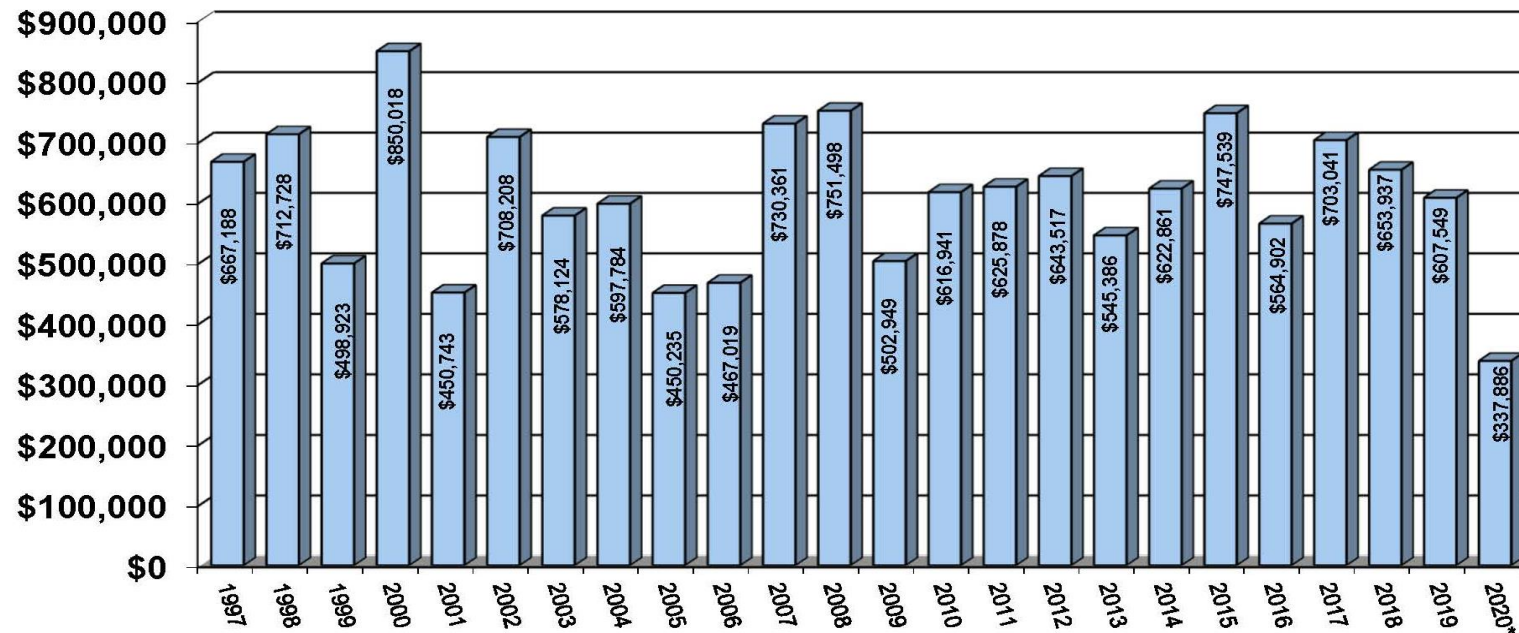
2020 Production Results – Monona Terrace Contracted Events

Destination Madison Sales & MASC Sales
Monona Terrace Contracts definite per Year




2020 Production Results – Monona Terrace Contracted Revenue

Destination Madison Sales & MASC Sales
Monona Terrace Contract Revenue per Year



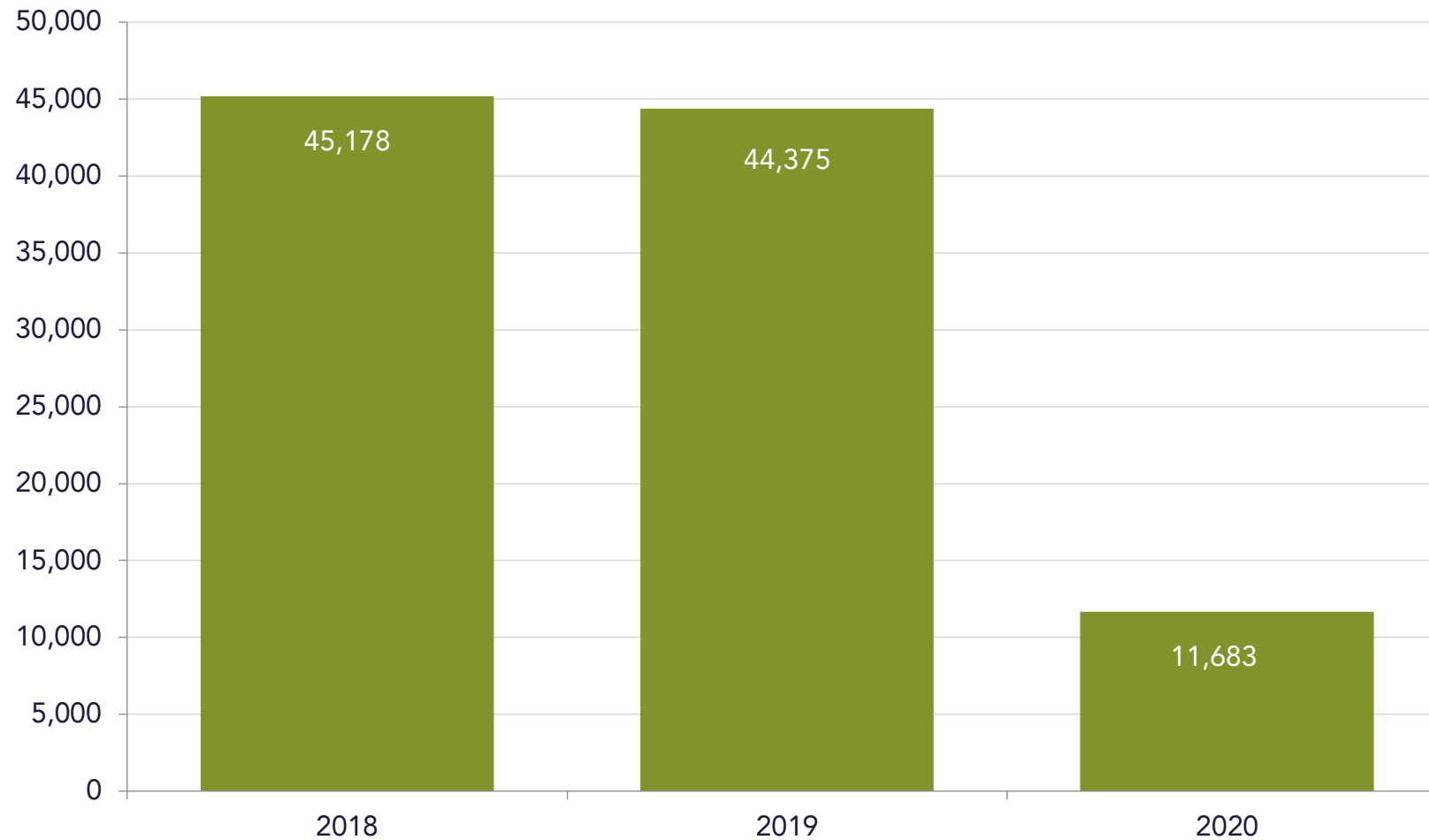
Priorities for 2021

Innovative Sales and Marketing

1. Business Development:
 - Keep Your Meetings and Events Home: Encourage local businesses and higher education leaders to host their events in Madison
 - Target account prioritization: build prospect pipeline
 - Optimization strategy in conjunction with hoteliers and Monona Terrace
 - Continued integration of sales product differentiators – One City. One Contract.; GBAC accreditation; virtual meeting capabilities; enhanced hybrid destination experiences
 2. Leverage Campus Connection for Bring Your Meeting Home opportunities
 3. Enhance prospect communications and engagement: virtual events; enhanced proposal presentations using DigiDeck; email marketing; face to face travel when safe
 4. B2B marketing: event risk mitigation; destination awareness; safety;
 5. Leverage Three City and Milwaukee alliances
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Madison Area Sports Commission

Room Nights Booked



2020 – 2021 Initiatives

- Cancellations / Rescheduling
- Client & Venue Support
- Sales Strategies
 - Client Events
 - Target Groups
 - Restart Morning Sports Report
 - Site Visits
 - E-Sports
 - Youth Grant Fund Racer

Brand

Marketing

7+ Campaigns Executed

All created and reshaped based on current environment for industry and destination



Marketing

ONLINE AUDIENCE

65% FEMALE
35% MALE

BY AGE

1. 25-34
2. 35-44
3. 45-64
4. 18-24

TOP CITIES

Madison • Greater Madison • Chicago • Milwaukee

TOP PERFORMING CONTENT

SOCIAL

4 Seasons &
Change of Seasons
Events
Food & Drink
Outdoor Activities
Capitol pictures
Skyline pictures

WEBSITE

Events
Outdoor Activities
Biking & Hiking
Food & Drink
Things to Do
Free Things to Do
Campaigns

PR & Communications

Media engagement

- 5.5 billion impressions (2019 - 7.3)
- 1.9 million mentions (2019 - 4.6)
- \$3.5 billion value (2019 - \$7.1)

2020 Media Themes

- Midwestern road trips
- Best places to/for _____
- Pandemic response/resiliency
- Outdoors
- Meetings/Events

Chicago Tribune

TRAVEL+
LEISURE

msn. TRAVEL

LIVABILITY®

PCMA **convene**

Visitor Experience

- **Visitors Assisted: 3,320**
Dane County Regional Airport Information Desk + Destination Madison Main Office
- **Visitor Guides Distributed: 91,000**
- **Enhanced exposure for parks & trails: 165**
Website listings featuring outdoor location & amenity information
- **Essential Madison Experiences**
Collection of local, immersive Madison activities held in-person & online
 - **Experiences Sold, 2020: 6,850**
 - New, Virtual Experience Offerings in 2020: 6
 - Virtual Experiences Sold, 2020 : 391



Appendix

Sports Cancellations in 2020

Account Name	Lead Name	Attend	Direct Spending	Start Date	Total Rooms	Headquarter Facility	Possible Rebook Notes
Wisconsin Interscholastic Athletic Association	WIAA Boys State Basketball Team Rooms	350	\$248,071	3/18/2020	861	UW-Madison - Other	
Wisconsin Wrestling Federation	WI Youth State Wrestling Tournament	3,000	\$306,679	3/26/2020	50	Alliant Energy Center	
Dairyland Sports	Dairyland Games	150	\$26,214	5/1/2020	20	Other	
USA Gymnastics	XCEL Regional Championships	2,000	\$728,805	4/23/2020	726	Alliant Energy Center	Working on Rebooking for 2021
Madison Roller Derby	Udder Chaos 2020	500	\$217,612	4/16/2020	100	Other	
Wisconsin State Bowling Association	2nd Half Open State Bowling Tournament	2,882	\$1,865,380	3/20/2020	2,825	Other	
USA Rugby	Midwest Regional Cup Tournament	1,000	\$333,197	6/25/2020	140	WI Rugby Sports Complex	
Madison Minotaurs Rugby Football Club	Madtown Scrumdown	150	\$49,184	5/15/2020	70	WI Rugby Sports Complex	
US Dept of Veterans Affairs - Sports Programs	Golden Age Games	1,200	\$1,521,139	6/16/2020	4,370	Alliant Energy Center	Rebooked Event to 2021 at AEC
Unicycling Society of America, Inc.	North Amer Unicycling Conv/Championships	300	\$185,739	6/26/2020	471	Edgewood Campuses	Working on Rebooking for 2021
Ragnar Relay Series	Reebok Ragnar Great Midwest 2020	4,000	\$193,433	5/16/2020	45	Other	
Madison Festivals Inc	Run Madtown	4,500	\$324,494	5/22/2020	50	Other	
CrossFit, Inc.	CrossFit Games	35,000	\$9,133,775	7/24/2020	17,394	Alliant Energy Center	
Wisconsin Interscholastic Athletic Association	State Softball Championships Team Rooms	600	\$263,484	6/10/2020	537	UW Athletic Facility	
Bass Federation (The)	WI Student Angler Fedn State Championship	100	\$19,110	8/14/2020	40	Other	
American Volkssport Association	Annual Meeting	20	\$14,356	7/9/2020	39	Hotel - Other	
World Triathlon Corporation	Ironman 70.3 Wisconsin	5,000	\$1,029,607	6/10/2020	1,281	Olin Park	
Madison United Rugby	WI Boys H.S. Rugby State Championships	2,000	\$155,843	6/5/2020	50	WI Rugby Sports Complex	
Beyond the Stars	Dance Tour - Madison	1,000	\$194,278	5/1/2020	62	Alliant Energy Center	
Wisc Intramural-Recreational Sports Assoc	State Conference	150	\$64,437	10/14/2020	180	UW-Madison - Other	Rebooked Event to 2021 at UW
Lacrosse America	Lacrosse America Madison Capital Classic	1,500	\$515,419	7/17/2020	620	Reddan Soccer Park	
Madison Mini-Marathon L.L.C.	Madison Mini-Marathon	11,800	\$1,004,549	8/20/2020	470	Other	
World Triathlon Corporation	IRONMAN Wisconsin 2020	14,800	\$2,804,184	9/8/2020	4,923	Monona Terrace	
Madison Festivals Inc	Madison Marathon	8,000	\$499,853	11/6/2020	248	Monona Terrace	
Gymfinity Children's Activity Center	2021 Dairy Aire Gymnastics Invitational	4,000	\$158,393	2/26/2021	50	Monona Terrace	
MYHockey	MYHockey Fall Tournament	500	\$325,788	10/23/2020	872	Sun Prairie Ice Arena	
Wisconsin Sports Services	Midwest Wrestling Tour	1,250	\$196,376	11/27/2020	300	Madison Marriott West	
MYHockey	MYHockey Veterans Cup	500	\$295,897	11/6/2020	880	Sun Prairie Ice Arena	
MYHockey	2021 MYHockey MidWinter Classic	500	\$307,449	1/16/2021	960	Sun Prairie Ice Arena	
Beyond the Stars	2021 Breakout Event	1,000	\$192,357	3/19/2021	300	Alliant Energy Center	

Sports Events Cancelled in 2020 = 30 107,752 \$23,175,101

38,934

