

2014 YEAR IN REVIEW



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MADISON

GOING > BEYOND > VISIT™

GREATER MADISON CONVENTION & VISITORS BUREAU



MADISON AREA
SPORTS
COMMISSION™

2014 YEAR IN REVIEW

2014 was a good year for our industry and our organizations. As we reflect on our industry and our performance and accomplishments of the last year, we continue to see changes in the tourism market product offerings – with increased penetration of AirBnB, Uber and Lyft in markets across the globe and increased options for lodging as investment in infrastructure occurs in competing markets. This creates an ever-changing landscape within which we compete for our destination's position in the consumer and convention and event organizers' minds.

Much of our success stems from our ability to be nimble and proactive; shifting and repositioning ourselves – and the destination - over time as the industry, demographics and technology dictate and opportunities avail themselves. This past year we focused on two key strategic areas that will position us and Greater Madison well for the future.

A leadership priority in 2014 was to secure sustainable funding for our organizations to ensure our ability to continue our work, deliver the performance expected of us by our stakeholders and investors and to keep our destination competitive. We were successful in securing a multi-year contract for the Convention & Visitors Bureau with the City of Madison which begins to fulfill the City's TOT Study Committee's investment recommendations to support Monona Terrace and the Convention & Visitors Bureau via room tax revenues. In addition, the Madison Area Sports Commission secured new investors in the City of Madison and Sun Prairie, who both contributed one year grants to support the Sports Commission's mission. These new contracts and funding sources complement the investments of the cities of Middleton, Verona and Fitchburg as well as funds from Dane County and private investors.

A second strategic focus was product development. By that we mean development of new and enhancements of existing community assets that attract visitors and convention and sporting events. The Convention & Visitors Bureau partnered with the City of Madison, Dane County and others to engage in a visioning study for the Alliant Energy Center campus – a conversation that we anticipate continuing into the future. The development of our core downtown, and in particular the Judge Doyle Square project, continues to engage our attention and that of our Community Relations Committee as they focus on public projects and initiatives that will have impact on visitors.

The Madison Area Sports Commission launched a Sports Product Development Committee in 2014 following the success of a sports venue development workshop in fall of 2013. This committee is charged with sharing sports trends and other data with municipal partners and others, and to provide insight and guidance to communities or developers as they consider enhancing existing or building new sports venues.

Since our inception, the Convention & Visitors Bureau has proudly led efforts to retain and attract events and visitors to our community and in 2014 we continued the tradition of generating positive economic impact for Madison. Together with the Sports Commission, we secured contracts for 162 future conventions and events that are expected to generate \$54.9 million in future direct spending.

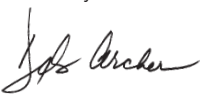
In 2013 the GMCVB entered into an agreement with Dane County to provide an on-site Sales Manager at Alliant Energy Center. This investment has proven very successful with over \$800,000 in contract revenue secured for Alliant Energy Center for future years. The much-anticipated opening of the New Holland pavilions at World Dairy Expo contributed to our success in securing this business.

The economic impact of tourism is something that benefits us all. And, while the external sales, marketing and PR work we do is largely invisible to local audiences and stakeholders, we know our economy is stronger and our quality of life much better thanks to increased visitors and visitor dollars. Generation of state and local taxes, better services and quality of life variables such as world class dining and new event venues are just some of the elements of our community that are positively impacted by our work to bring visitors to Madison.

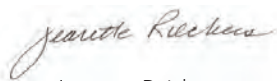
In addition to securing and hosting events, we proudly perform vital roles in assisting with some of our areas largest events such as World Dairy Expo, Ironman, WIAA and Epic Users Group meetings. Highlights of 2014 and exciting new events for 2015 follow.

Our success is your success. It is because of your partnership, and your commitment to supporting our efforts that we are successful and continue to make tourism a \$1.8 billion industry in Dane County. We gratefully acknowledge the public and private stakeholders who have been instrumental in our success; the tireless energy of our volunteer Boards of Directors and committee members and of course our hard working team. Our work will continue in the decades to come and we thank you for helping us deliver great experiences for our visitors.

Sincerely,



Deb Archer
President & CEO



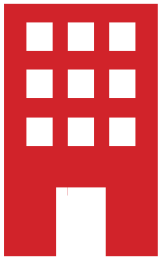
Jeanette Reichers
Chair of GMCVB



Doug Chickering,
Chair of MASC

WHAT WE'VE ACCOMPLISHED...

Tourism is big business. We take great pride in reporting the results of our 2014 activities that demonstrate how our work in bringing visitors to our area is a major economic driver for our city and all of Dane County. This Year in Review underscores how our work puts Greater Madison on the map in a powerful way.



The **GMCVB & MASC Booked**

162

convention and sporting events in **2014**

Sales and services teams secured conventions, conferences, consumer shows and sporting events that will generate economic impact for the greater Madison area in future years.

Direct spending generated

\$54.9 MILLION

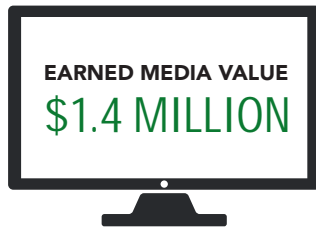


These events generate direct spending that supports our local hotels, retailers, restaurants, cultural amenities and ultimately our quality of life.



ROOM NIGHTS

92,660



EARNED MEDIA VALUE

\$1.4 MILLION



Space contract revenues for Monona Terrace and Alliant Energy Center

\$1.43 MILLION

ROI

We strive to bring high value groups to our destination. Every dollar we generate in space contracts for our venues generates significant additional services revenue – from catering to audio visual rentals – that further enhance the value of the event.

WHAT DOES THIS ALL MEAN?

Your investment in our work pays big dividends to our community.



Every dollar invested generated **\$13.60** in return.

THAT'S BIG BUSINESS.

WHAT WE'RE TALKING ABOUT...

Destination Product Development has been at the core of our community conversations in 2014.

- > Judge Doyle Square - We have been actively engaged in this critical and potentially transformational downtown development project. With a much needed hotel to support and grow convention business at Monona Terrace as one element of this complex project we anticipate continuing our engagement as the conversation evolves in 2015.
- > Alliant Energy Center – Strategic Visioning for the Alliant Energy Center campus provides opportunity for a re-imagined gateway to Madison
- > Sports Product Development – Our Sports Product Development Committee formed to engage in local and regional conversations to enhance community assets and opportunities

We are engaged in shaping the Visitor Experience:

- > Sharing Economy Conversations – Uber and Lyft
- > Quality of Life Downtown – Committee engagement
- > Community Safety

And we continue to represent our Destination:

- > Governor's Council on Tourism
- > Department of Tourism Committees: Meetings & Conventions and Sports Marketing
- > Wisconsin Association of Convention & Visitors Bureaus Board

GREATER MADISON CONVENTION & VISITORS BUREAU

KEY ACCOMPLISHMENTS

Convention Sales and the support of our sales efforts are at the heart of our work. In 2013 we added a key resource to support our sales effort - a Sales Manager dedicated to support Alliant Energy Center. We have seen impressive results from this addition to our resources which were also enhanced by the excitement generated among hobby and agricultural groups as the new pavilions were announced.

The GMCVB sales team continues to focus on our key target market segments selling to groups in markets such as Environmental, Education, Scientific, Engineering, Agriculture and Hobby among others.

In 2014 we began exploration of a multi-city sales alliance designed to create an opportunity for us to leverage the sales efforts of multiple teams to generate business for all. We researched convention & visitors bureaus that would be similar to Madison's target markets, convention and meeting space, hotel package and other traits. We identified Providence RI and Spokane WA as cities that would be a good match. Over the course of the year, we have had several meetings to discuss and define a sales collaboration. The 2014 activities culminated in a joint sales event conducted in Washington DC in December. We will continue to engage in the collaboration in 2015.

We also recognize that meeting planners and convention decision makers either know Madison or Madison's reputation well or not at all. With that in mind, we conducted a Familiarization Tour with eleven highly qualified prospective customers in October 2014. The response from the group was very positive and we had several contracts under negotiation by year end as a result of their visit.

HIGHLIGHTS OF 2014 CONVENTION SALES RESULTS:

- > Contracted for 126 conventions and events for future years that will bring an estimates \$43.4 million in direct spending to our community
- > Contracted for 71,000 hotel room nights
- > Secured over \$622,000 in Monona Terrace space revenue and over \$800,000 in Alliant Energy Center contract revenue
- > Booked over 33,000 hotel reservations on behalf of convention and event attendees, generating over \$190,000 in earned housing revenues



KEY SALES ACTIVITIES

- > Attended Professional Convention Management Association's (PCMA) Convening Leaders
- > Attended Destination Marketing Association International (DMAI) Showcase
- > Attended target market meetings such as:
 - CESSE Mid-Winter and Annual Meetings
 - American Veterinary Medical Association
 - Fraternity Executives Association
 - National Coalition of Black Meeting Planners
 - American Agri-Women Convention
- > Attended Meeting Professionals International World Education Congress
- > Attended IAEE Expo! Expo!
- > Hosted 63 site visits and a Meeting Planner Familiarization Tour conducted in October

KEY EVENTS

2014 HIGHLIGHTS

- > The Matrix Center – WPC 15
- > American Physical Society – 2014 Division of Atomic, Molecular & Optical Physics Annual Meeting
- > American Meat Science Association – 2014 Reciprocal Meat Conference
- > Gold Wing Road Riders Association – Wing Ding 36
- > American Meteorological Society – 27th Conference on Severe Local Storms
- > PDS (Paragon Development Systems) Meeting

2015 HIGHLIGHTS

- > Wizard World Inc. – Wizard World Con
- > Wisconsin Cheese Makers Association – Wisconsin Cheese Industry Conference
- > Geological Society of America – North Central Regional Conference
- > International Economic Development Council – IEDC Economic Future Forum
- > Family Motor Coach Association – 2015 Family Reunion
- > Dane County – Wisconsin Farm Technology Days 2015

CONVENTION & VISITORS BUREAU MARKETING UPDATE

Our team provides marketing strategy and execution of activities that present the destination to prospective visitors and support our internal clients: convention sales, convention and event services, partnership and leadership.

The tools and tactics we develop help raise awareness of our destination—and provide key information that keeps visitors engaged.

ONLINE VISITS ON THE RISE

Our digital marketing strategies continue to drive increased traffic and engagement. In 2014, we invested resources in capturing fresh photography throughout the year, and curated content around itinerary ideas that have helped our Things to Do section become a top-visited section of our site.

visitmadison.com unique visitors are up 19% over prior year to 1.5 million



NEW COMMUNICATIONS GAINING MOMENTUM

A key part of our communications strategy in 2014 was the redesign and launch of e-newsletters targeting key audiences, which has resulted in improved click-to-open rates in 2014. These newsletters serve our partners, leisure travelers and event planners by providing timely and relevant information.

New e-newsletters launched in 2014 are trending up in click-to-open rates.

LEADING THE WAY IN LEISURE CAMPAIGNS

Madison was among the first U.S. cities to launch a Hotel Week promotion, and our second year results showed an increase in room nights and other relevant metrics:

- > Room nights tripled, creating awareness and trial of our destination with regional visitors.
- > Unique visitors to madisonhotelweek.com nearly doubled. More than 8,000 people explored options to book online, search for events taking place during their time in town and download itinerary ideas.
- > Received Wisconsin Department of Tourism Trailblazer Award

EXCEPTIONAL EDUCATIONAL EVENTS

In 2014, we produced a series of educational events that touched on industry trends and other best practices for our partners and key community stakeholders.

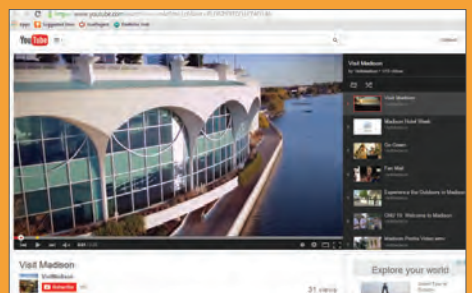
Nearly 300 partners attended industry education events including Spring into PR, Go Green and the Complete Guide to Customer Service.



Our organizational events, including the National Travel & Tourism Week event as well as City and County Meet & Greets, were designed to thank our stakeholders and share information about the GMCVB's role in creating economic impact in our industry. More than 150 community members and partners attended these events.

PRESENTING OUR DESTINATION

The marketing and communications teams work to support the efforts of the Sales and Convention and Event Services team via a variety of tools and tactics. In 2014, we launched Madison Meetings Insights, a biannual e-newsletter publication targeting national meeting planners who will likely be bringing a meeting to Madison. This publication highlights new facilities and services in our destination, as well as educational articles that are helpful to planners. We also re-released our Meeting Planner Destination video, which featured updated imagery of the New Holland Pavilions on the Alliant Energy Center campus as well as fall recreational activities that are appealing to event attendees.



PARTNERSHIP UPDATE

The partnership department is responsible for generating private sector investment in the work of our organization. They actively work to identify and partner with organizations that are engaged in the tourism industry and contribute directly to delivering a memorable destination experience.

In addition, the partnership team works with those organizations that support the economic development and direct economic impact mission of the GMCVB. We engaged more than 500 partner businesses in 2014, and we are grateful for the products and services these businesses provide to Dane County's visitor industry—and the support they provide our organization.

STRONG PARTNERS, SATISFIED VISITORS

Strong partner relationships are a key component to maintaining a healthy destination. In 2014, our partnership team extended its service strategy by implementing more than 1,400 touch points with partner businesses, and hosting key education events for our partners.

Private investment in our work is critical to our success. Since 2012, total partner revenue has increased by 7% and renewing partner revenue has increased by 13%. In 2014, total partner revenue grew to \$346,063.

We are exceptionally grateful for the significant commitment of partners in our Premier Investor category. These businesses are leading the way by investing in our work—and the resulting economic impact in our community.

Our partnership
base remained
stable, with

92.5%

of partners
renewing their
investment in 2014.

PREMIER INVESTORS

DESTINATION CHAMPIONS

Alliant Energy
American Family Insurance
BMO Harris Bank
First Business Bank
Food Fight Restaurant Group
Hilldale Shopping Center
Ho-Chunk Gaming Madison Casino
Madison Originals
Overture Center for the Arts
Physicians Plus Insurance Corporation
UW-Madison
Wisconsin Distributors

CORPORATE PARTNERS

Ancora Coffee & Tea
CUNA Mutual Group
Discovery Building
East Towne Mall
Epic
Good Karma Broadcasting - ESPN Radio
J.H. Findorff & Son Inc.
Greenway Station Shopping Center
Johnson Creek Premium Outlets
Marcus Theatres
Madison Gas & Electric Co.
Nei-Turner Media Group, Inc.
West Towne Mall

PR UPDATE

Our Public Relations efforts continue to provide visibility for our destination and organization nationally, regionally and locally. The efforts we expend garnering media allow us to stretch the marketing budget and reach audiences we otherwise could not afford. In addition to pitching stories and responding to media requests, staff hosted a group of international media and group tour planners in concert with the IPW event and WI State Department of Tourism. In 2014, earned media totaled over \$1.4 million dollars.

We are proud of the rankings and coverage we secured for Madison. Some highlights follow.

- >#1 in Top 100 Places to Live, Livability.com, September 2014
- >#1 Best College Football Towns, NCAA, September 2014
- >#2 City for Young Entrepreneurs, NerdWallet, November 2014
- >#4 Best Cycling Towns, USAToday Travel, April 2014
- >#7 in Top 50 U.S. Swim Cities, USA Swimming, August 2014
- >5 Wine Destinations off the Beaten Path, The Today Show, June 2014
- >Foodie Cities: Real Estate for the Restaurant Set, Wall Street Journal



nerdwallet

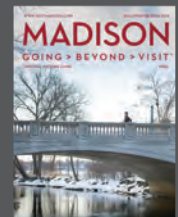


THE WALL STREET
JOURNAL

COMMUNICATIONS UPDATE

Social media and print communications vehicles provide additional means to share the Madison story with visitors. Each year we proudly create two Madison Visitors Guides that are widely distributed to meeting planners, attendees, and visitors coming to our destination. With information on partner businesses and highlighted activities and events that will occur each season these provide companion information to our web site visitmadison.com

Social media through Facebook and twitter increase our reach to visitors. In 2014 our average weekly reach through Facebook was over 13,000 and average monthly twitter impressions exceeded 48,000.





MADISON AREA SPORTS COMMISSION

KEY ACCOMPLISHMENTS

The Madison Area Sports Commission focused on three strategic areas in 2014: pursuing high value sporting events for the greater Madison area, engaging in sports product development conversations to help our communities as they invest in sports infrastructure, and securing additional financial investment in our work.

In 2013 we invested in an additional sales manager to actively pursue sports in our primary and emerging market segments. Our 2014 results were impressive, with total events contracted totaling 36 events – up from 23 events prior year. Even more impressive, the direct spending expected from these events is \$11.5 million – a \$2.1 million increase over the direct spending generated in 2013.

The Sports Product Development Committee comprised of Board members and interested community representatives became actively engaged in conversations with municipal and county leaders and parks departments to offer input and share sports trends data to assist in planning sports product development in the greater Madison area. These conversations ranged from discussions about indoor competition spaces, outdoor complexes to conversations re-imagining a public park in Fitchburg. Future presentations and conversations are being scheduled for 2015 to continue this important work.

In 2014 the investment of room tax from the cities of Middleton, Verona and Fitchburg as well as funds from Dane County continued to support the work of the sports team. We also leveraged grants from Middleton, Dane County and the Wisconsin Department of Tourism to support key events and marketing projects. We are grateful for additional investment from the City of Madison and Sun Prairie who are providing one-year grants for 2015 funding.

In addition to our ongoing work efforts, the Sports Commission Board began updating the MASC Strategic Plan and will finalize the plan in early 2015. This plan will guide our work focus over the next three years.

HIGHLIGHTS OF 2014 SPORTS SALES RESULTS:

- > Contracted for 36 sporting events for future years that will bring an estimated \$11.5 million in direct spending to our community
- > Contracted room nights total over 21,000
- > Awarded over \$45,000 in grants to local youth sports providers through the MASC Youth Grant program supported by Ironman Foundation



KEY SALES ACTIVITIES

- > Attended the National Association of Sports Commission – Oklahoma City, OK
- > Engaged in one-on-one appointments at Connect Sports – Orlando, FL
- > Participated in Olympic Sportslink designed to provide opportunities to create strategic partnerships between National Governing Bodies (NGB) and those entities interested in Olympic sport and hosting Olympic Team Trials events and NGB Championship events - Chicago, IL
- > Attended TEAMS – Travel, Events and Management in Sports conference - Las Vegas, NV
- > Travelled to Indianapolis to meet with a variety of events rights holders and National Governing Bodies headquartered in Indy
- > Hosted 12 site visits to Madison for event planners and participated in a Familiarization Tour showcasing Madison to highly qualified and invited event decision makers in conjunction with the Convention & Visitors Bureau

KEY EVENTS

2014 HIGHLIGHTS

- > US Wrestling World Team Trials
- > US Rugby Club National Championships
- > US Lacrosse Central Championships
- > USA Cycling Amateur and Paracycling Road National Championships
- > National Archery in the Schools Program World Tournament
- > Tug of War International Federation Outdoor World Championships

2015 HIGHLIGHTS

- > WIAA Boys Basketball State Championships – 100th Anniversary
- > USA Climbing – American Bouldering Series National Championships
- > Gymfinity – Dairy Aire Gymnastics Invitational
- > US Speedskating – National Age Group Short Track Speedskating Championships
- > Unicycling Society of America – North American Unicycling Convention & Championships
- > International Gay & Lesbian Football Association – IGLFA North American Championship II
- > US Wrestling World Team Trials
- > US Lacrosse Central Championships

MADISON AREA SPORTS COMMISSION MARKETING UPDATE

Our team provides marketing strategy and execution of tools and tactics that generate genuine passion with our key audiences: sports event planners, athletes and spectators.

CHECK OUT OUR NEW WEB SITE: madisonsports.org

In September 2014, we launched a new website with a fresh design and curated content that clearly represents the MASC brand and the needs of our organization. A key part of the design is prominent imagery that highlights the assets of our premiere sports destination and the passion our community has for sporting events. In addition, new functionality allows us to create customizable microsites for marquee events.

A REASON TO RISE AND SHINE

A successful first year fueled enthusiasm for our Morning Sports Report program, a quarterly breakfast series hosted in partnership with ESPN Madison. On average, each event draws an average of 75 business professionals and sports enthusiasts for networking and sports oriented panel programming. In 2014, topics included Sports Media, Sports Medicine, Big Ten Network and Milwaukee Bucks leadership.

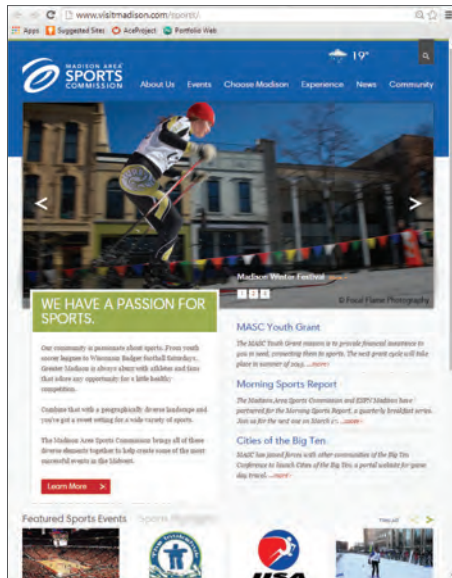


EVENT MARKETING & MORE

Providing marketing support to events we secure for Madison is a critical component of the MASC marketing strategy. The support is intended to drive awareness, participation and spectator interest in the event. In 2014, marketing support was provided to many of the 36 events that MASC brought to Greater Madison, including outdoor, print, radio, and digital tactics.

MASC is also engaged in developing and executing the annual IRONKIDS fun run associated with IRONMAN Wisconsin. In 2014, we revamped the program for this fun run, which resulted in an increase to 125 participants and a \$1,500 donation to the Madison Area Sports Commission. Sponsorships from Edgewood College and North Central Group also helped to make this event possible.

In addition to servicing regional and national sporting events, MASC continued providing support to the 15 WIAA tournaments hosted in Madison—the Championship Capital—throughout the year. In early 2014, we began the exciting process of planning and executing the milestone 100th anniversary of the Boys State Basketball Championships in Madison taking place in 2015.



GROWING YOUTH GRANT PROGRAM

As part of our contract for IRONMAN Wisconsin, we receive funds from the IRONMAN Foundation that we give back to the community through the MASC Youth Grant program. We awarded a total of \$45,017 in funding in 2014 through our youth grant program. In total, a record 34 applications were received and “Big Checks” were awarded to 24 groups.



Madison Welcomes
NATIONAL ARCHERY IN THE SCHOOLS PROGRAM
WORLD TOURNAMENT

MADISONSPORTS.ORG **JULY 11-13**
Alliant Energy Center

Thousands of jobs



Tourism supports **20,405** full-time equivalent jobs in **Dane Co.**

That's **10.9%** of tourism-related jobs in the entire state!



Billions of dollars

In Dane County alone, visitors spent more than

\$1.9 billion
in 2014



\$142 million state and local taxes were generated by tourism spending in **2014**

All data provided by these reports: U.S. Travel Association, March 2015, *Economic Impact of Tourism in Wisconsin*, April 2015, Tourism Economics *Economic Impact of Tourism in Dane County, 2014 & 2015*, Tourism Economics

LOOK WHO'S TALKING ABOUT US...

"#1 in Top 100 Places to Live"

LIVABILITY 

"Great Weekend Road Trips"

Forbes.com

"10 Best Cities for Food Trucks This Summer"

USA TODAY

"10 Best Cities for Active Families"

Outside
LIVE BRAVELY

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Joel Weitz, Vitense Golfland

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