

MIAMI

GREATER MIAMI  
CONVENTION &  
VISITORS BUREAU

# Tourism Recovery Plan Overview



4.21.20

MIAMI  
GREATER MIAMI AND THE BEACHES



## AGENDA

- Overall Strategy
- Pre-Recovery Efforts
- Hotel Performance and Outlook
- Recovery Plan Framework
- Partner Feedback



**GMCVB  
PRE-RECOVERY  
EFFORTS**

## Coronavirus Response Strategy



## Stakeholders & Partners

- Leisure Vacationers
- Meeting / Convention Planners & Attendees
- Journalists
- Hotels, Restaurants, Retail, Attractions, Museums
- Airlines, Cruise Lines, Airlines
- MIA, PortMiami, Tourism Infrastructure
- Greater Miami and the Beaches Hotel Association
- Miami Beach Visitor & Convention Authority
- BIDS / Regional Marketing Groups
- Beacon Council / Economic Development
- Chambers of Commerce
- Hospitality Workers
- Residents (in support of City / County efforts)
- Cities / Counties
- Major Event Planners
- Other

# Relief & Recovery Programs

- GMCVB.com/ Covid19** Ongoing updates and advisories for visitors and partners. **Launched 3.02**
- GMCVB.com/ MiamiEats** Program featuring 1050 local restaurants offering takeout/delivery. **Launched 3.19**
- GMCVB.com/ Lodging** An up-to-date list of hotels that are open for essential lodgers. **Launched 3.22**
- GMCVB.com/ Help** List of all the relief programs and recovery efforts including our partnership with United Way Operation Helping Hands. **Launched 3.25**
- GMCVB.com/ MiamiSalutes** Showcase of special offers from the hospitality industry and others to recognize the heroic efforts of our front line and first responders. **Launched 3.27**
- GMCVB.com/ VirtualMiami** Showcases local virtual events, webcams, videos, and downloadable backgrounds for remote meetings to help lift spirits and keep Miami top of mind for our future guests. **Launched 3.30**

All programs are easily accessible by clicking on advisory banner links on [GMCVB.com](https://www.gmcvb.com).

GREATER MIAMI  
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## Tourism Relief & Recovery Programs

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The Greater Miami Convention & Visitors Bureau (GMCVB) continues to develop ways to help our hospitality industry and its employees navigate through these unprecedented times, with a three-pronged Coronavirus Response Strategy.

**Educate**

Engage stakeholders and arm them with the latest information and resources to make informed decisions.

→

**Mitigate**

Adjust marketing activities responsibly to maintain as much business as possible to blunt the impact on the industry and its employees.

→

**Stimulate**

Deploy a comprehensive business recovery plan to quickly regain market share and economic activity at the appropriate time.

Several programs are available to assist:

[GMCVB.com/Help](https://www.gmcvb.com/help)

Comprehensive list of relief programs and recovery efforts, including partnership with United Way Operation Helping Hands. (Also easily accessible on the advisory banner on [GMCVB.com](https://www.gmcvb.com).)

[GMCVB.com/MiamiEats](https://www.gmcvb.com/miami/eats)

Treat yourself, treat your friends and treat your heroes. Showcasing more than 1,000 restaurants offering takeout and delivery.

[GMCVB.com/VirtualMiami](https://www.gmcvb.com/virtualmiami)

Showcasing local virtual events, webcams, videos, and downloadable backgrounds for remote meetings.

[GMCVB.com/Covid19](https://www.gmcvb.com/covid19)

Ongoing updates and advisories for our visitors and partners.

[GMCVB.com/MiamiSalutes](https://www.gmcvb.com/miami/salutes)

Showcasing special offers from the hospitality industry and others to recognize the heroic efforts of our front-line workers and first responders.

[MealsForHeroesMiami.org](https://www.mealsforheroesmiami.org)

Partnership to pay restaurants a stipend to prepare high-quality meals to deliver to front-line heroes and first responders.

[GMCVB.com/Lodging](https://www.gmcvb.com/lodging)

An up-to-date list of hotels that are open for essential lodgers.

For additional information and updates, please visit [GMCVB.com](https://www.gmcvb.com)

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## Programs & Community Resources

**MIAMI EATS:  
ORDER OUT. HELP OUT.**



GREATER MIAMI  
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VISITORS BUREAU



MEALS FOR  
HEROES MIAMI

### TREAT YOURSELF

No need to buy too many groceries when Miami's restaurants can provide you and your family with great meals at great prices. Whether it's pick-up, delivery or curbside, these establishments can satisfy any taste. And what better way than to help your favorite local restaurants stay in business during the crisis. *Launched 3.20*

### TREAT YOUR FRIENDS

Another way to show some culinary love to the restaurants is to purchase their gift cards for all those special occasions you'll feel guilty not being able to spend with your friends. *Launched 4.09*

### TREAT YOUR HEROES

Meals for Heroes Miami is an organization paying restaurants a stipend to prepare high-quality meals to deliver to these heroes at hospitals, police, and fire stations. They are hoping to expand their efforts with your support. Please help by donating to this amazing program. *Launched 4.08*

**1,050 Restaurant Participants as of 4/21/20**

All programs are easily accessible by visiting [GMCVB.com/MiamiEats](https://www.gmcb.com/miami-eats)

# Social Media to Date

## Miami Eats

## GMCVB Initiatives

## Miami Moments

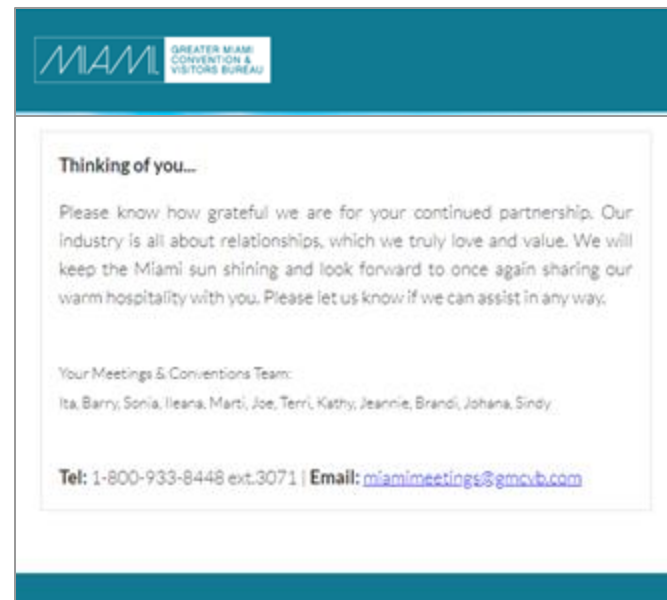
## UGC: Instagram Stories





## Meeting Planner Communications

- Sales team working one-on-one with planners to maintain and reschedule business.
- Encouraging planners to stay in touch.
- Sharing resources with clients to boost morale (Music playlists, live webcams, etc.)
- Zoom calls with clients to check-in and see each other face to face.
- Working to quantify destination-wide impact of cancellations and postponements.



## 2020 MBCC Meetings Currently Scheduled

Organization	Month	Days	Attendance	TRN	Peak
Florida SuperCon	Jun/July	30-06	36,000	2,450	600
Institute of Internal Auditors	July	17-25	2,500	6,767	1,563
FIME- Florida Intl Medical Expo	Aug	25-27	10,000	2,635	750
Realcomm Conference Group	Sept	02-03	1,000	3,220	1,000
Elite Exhibitions	Sept	03-04	2,000	1,110	300
Congress of Neurological Surgeons (CNS)	Sept	13-16	4,500	8,435	2,199
Transcatheter Cardiovascular Therapeutics (TCT)	Sept	23-27	15,000	27,310	6,400
Amer Soc of Landscape Architects/Mtg & Expo	Oct	1-5	5,000	8,000	1,750
LE MIAMI	Oct	6-8	1,500	3,598	761
Jewelers Intl Showcase	Oct	13-16	10,000	4,650	1,000
Amer Soc for Radiation Oncology (ASTRO)	Oct	25-28	12,000	38,100	7,500
World Trade Center Miami/America's Food & Beverage Show	Nov	02-03	3,000	350	100
Int'l Bar Association	Nov	02-06	5,000	11,770	2,100
emerge Americas	Nov	04-05	15,000	1,945	500
The Intl Air Cargo Association	Nov	09-12	2,000	3,320	835
Tissue World Americas 2020	Nov	11-13	1,500	2,850	700
Northstar Travel Media/CruiseWorld	Nov	11-13	1,200	1,473	500
MCH Basel Exhibition LTD/Art Basel	Dec	02-06	40,000	13,900	2,400
World Perfumery Congress	Dec	15-17	1,200	2,320	550

# Destination Pledge for All Customer Touch Points (in development)

## Miami International Airport (MIA):

- High touch point areas such as handrails, elevator buttons are cleansed frequently
- Additional hand sanitizing stations
- Additional signage on how to prevent spread of COVID-19
- Dining & lounges restricted to 50 percent capacity
- Implementing social distancing (at least six feet) for passengers and staff
- Other

## Transportation / Shuttles:

- Drivers/customers must wear facial coverings
- Limiting all physical contact
- Hand sanitizer, face masks and cleaning supplies are being distributed to drivers
- Disinfecting and cleaning all surfaces after each ride
- Removed additional touchpoints in vehicles
- Water being offered with paper towels
- Trash is disposed with gloves after each ride
- Social distancing will be adhered to in vehicle capacities

## Hotels:

- Staff training on proper techniques to prevent transmission
- Increasing frequency of cleaning and disinfecting
- Additional signage
- Conducting regular temperature/symptom checks
- Create a temporary quarantine area
- Installing high-efficiency air filters
- Staff wearing masks or face cover
- Physical distancing, maintain 6 feet distance, includes not shaking hands
- Other

## Miami Beach Convention Center:

- Additional hand sanitizer dispensers
- Additional signage throughout venue
- Increased cleaning and disinfecting
- Touch-free surfaces in restrooms
- Staff training on proper prevention techniques
- MBCC food & beverage service providers also taking appropriate measure
- Other

## Restaurants / Retail:

- More details to come

## Meeting Planners / Event Organizers:

- More details to come

## Travel Industry Updates

### Miami International Airport

- From March 20 to April 19, daily flights have dropped from 725 to 143 flights per day representing a decline of 80.2%. Passenger traffic has dropped from 50,247 to 4,718 passengers representing a decline of 90.6%.

### Airlines

- Major US airlines (American, Delta, United, Southwest, Alaska Airways and JetBlue) will be receiving \$60B in federal aid from the U.S. Government.
  - Part of the federal aid includes \$25B to go towards airline's payrolls through October 2020.

### American Airlines

- Planning for recovery and making daily adjustments to future capacity.
- International service will resume during Q2 as follows:
  - Latin America: Sao Paulo, Santiago & Buenos Aires (May 7); Rio de Janeiro (June 4); Brasilia (Oct 25)
  - Europe: Madrid (July 7); Barcelona, Paris & Milan (Oct 25)

### Cruise Lines

- Many cruise brands have paused operations until further notice.
- Last month, Royal Caribbean, Norwegian, Carnival Cruise Lines, MSC Cruises & Virgin Voyages announced resuming operations in July and August - this timing may change



**HOTEL  
PERFORMANCE  
AND OUTLOOK**

# Countywide Hotel Performance

<b><u>Week of:</u></b>	<b><u>Supply</u></b>	<b><u>% Change</u></b>	<b><u>Demand</u></b>	<b><u>% Change</u></b>	<b><u>Occupancy</u></b>	<b><u>% Change</u></b>	<b><u>ADR</u></b>	<b><u>% Change</u></b>	<b><u>RevPAR</u></b>	<b><u>% Change</u></b>
March 15 – March 21	59,620	+3.2%	132,283	-61.6%	31.7%	-62.8%	\$174.77	-30.5%	\$55.39	-74.1%
March 22 – March 28	59,620	+3.2%	81,616	-76.7%	19.6%	-77.4%	\$116.64	-57.9%	\$22.81	-90.5%
March 29 – April 4	57,816	-0.1%	75,018	-77.1%	18.5%	-77.1%	\$127.39	-42.9%	\$23.61	-86.9%
April 5 - April 11, 2020	56,458	-2.5%	79,721	-76.4%	20.2%	-75.8%	\$89.53	-59.3%	\$18.06	-90.2%
<b>4 Week Average</b>	<b>58,379</b>	<b>+0.9%</b>	<b>92,160</b>	<b>-72.9%</b>	<b>22.5%</b>	<b>-73.3%</b>	<b>\$127.08</b>	<b>-47.7%</b>	<b>\$29.97</b>	<b>-85.4%</b>

Source: STR

## 2020 Hotel Industry Outlook – Miami Dade “Upside” Forecast

<b><u>2020</u></b>	<b>Q1 2020</b>	<b>% Change</b>	<b>Q2 2020</b>	<b>% Change</b>	<b>Q3 2020</b>	<b>% Change</b>	<b>Q4 2020</b>	<b>% Change</b>
<b>Occupancy</b>	68.8%	-16.9%	24.5%	-68.1%	55.4%	-20.1%	69.0%	-8.0%
<b>Room Rate</b>	\$231.30	-7.1%	\$104.52	-43.3%	\$129.53	-11.8%	\$183.15	-7.7%
<b>RevPAR</b>	\$159.15	-22.8%	\$25.62	-81.9%	\$71.76	-29.5%	\$126.33	-15.0%

<b><u>2021</u></b>	<b>Q1 2021</b>	<b>% Change</b>	<b>Q2 2021</b>	<b>% Change</b>	<b>Q3 2021</b>	<b>% Change</b>	<b>Q4 2021</b>	<b>% Change</b>
<b>Occupancy</b>	78.9%	+14.7%	74.9%	+205.5%	70.1%	+26.6%	71.7%	+4.0%
<b>Room Rate</b>	\$258.90	+11.9%	\$190.53	+82.3%	\$156.48	+20.8%	\$202.49	+10.6%
<b>RevPAR</b>	\$204.33	+28.4%	\$142.65	+456.9%	\$109.72	+52.9%	\$145.26	+15.0%

Source: CBRE revised forecast as of 4/10/2020

## 2020 Hotel Industry Outlook – Miami Dade “Downside” Forecast

<b><u>2020</u></b>	<b>Q1 2020</b>	<b>% Change</b>	<b>Q2 2020</b>	<b>% Change</b>	<b>Q3 2020</b>	<b>% Change</b>	<b>Q4 2020</b>	<b>% Change</b>
<b>Occupancy</b>	68.6%	-17.2%	15.3%	-80.1%	26.3%	-62.0%	38.4%	-48.7%
<b>Room Rate</b>	\$231.16	-7.2%	\$95.23	-48.4%	\$100.56	-31.5%	\$136.06	-31.4%
<b>RevPAR</b>	\$158.58	-23.1%	\$14.58	-89.7%	\$26.47	-74.0%	\$52.30	-64.8%

<b><u>2021</u></b>	<b>Q1 2021</b>	<b>% Change</b>	<b>Q2 2021</b>	<b>% Change</b>	<b>Q3 2021</b>	<b>% Change</b>	<b>Q4 2021</b>	<b>% Change</b>
<b>Occupancy</b>	52.5%	-23.4%	59.3%	+287.0%	61.8%	+134.7%	65.7%	+71.0%
<b>Room Rate</b>	\$182.82	-20.9%	\$144.53	+51.8%	\$128.74	+28.0%	\$160.28	+17.8%
<b>RevPAR</b>	\$96.02	-39.4%	\$85.66	+487.4%	\$79.56	+200.5%	\$105.35	+101.4%

Source: CBRE revised forecast as of 4/10/2020



## 2020 Hotel Industry Outlook – 2021 vs 2019

<b>“Upside”</b>	<b>QTR</b>	<b>% Change Occ</b>	<b>% Change ADR</b>	<b>% Change RevPAR</b>	<b>% Change Supply</b>	<b>% Change Demand</b>
<b>2021 vs 2019 % Change</b>	1	-4.7%	+4.0%	-0.9%	+4.7%	-0.2%
	2	-2.5%	+3.3%	+0.7%	+3.6%	+1.0%
	3	+1.2%	+6.6%	+7.8%	+3.2%	+4.5%
	4	-4.4%	+2.1%	-2.3%	+5.4%	+0.8%

<b>“Downside”</b>	<b>QTR</b>	<b>% Change Occ</b>	<b>% Change ADR</b>	<b>% Change RevPAR</b>	<b>% Change Supply</b>	<b>% Change Demand</b>
<b>2021 vs 2019 % Change</b>	1	-36.6%	-26.6%	-53.4%	+4.3%	-33.9%
	2	-22.8%	-21.6%	-39.5%	+2.7%	-20.8%
	3	-10.8%	-12.3%	-21.8%	+2.9%	-8.3%
	4	-12.4%	-19.2%	-29.2%	+2.3%	-10.3%

Source: CBRE revised forecast as of 4/10/2020

An aerial photograph of a city skyline at sunset. The sky is a mix of blue and orange, with scattered clouds. In the foreground, there is a large, modern, white, curved building with a glass facade. To the left, a bridge spans across a body of water. The city skyline in the background features several tall skyscrapers. The overall scene is a mix of urban architecture and natural elements like trees and water.

**RECOVERY  
PLAN  
FRAMEWORK**

# Strategic Marketing Overview

## Pre-Recovery

Mid-April through Hotel Reopening\*

### Objective

Keep Miami top-of-mind as a leisure travel and meetings destination.

### Approach

- Target local, drive, and US markets
- Show the serenity of the beach/outdoor/nature as a counter to COVID-19 stressors
- Highlight culturally infused experiences — dance, music, food and art, through virtual experiences when possible
- Feature neighborhoods that bring diversity to life
- Share uplifting stories and user-generated content that show Miami's community and spirit
- Subtly highlight the year-round seasonality of Miami that will greet travelers when they are ready

## Recovery

Hotel Reopening\* - Sept 30th

### Objective

Drive hotel demand in Miami and reignite interest in booking meetings and conventions.

### Approach

- Target local Miami visitors and drive markets including Florida and Georgia for the first month, then expand nationally as appropriate
- Continue to highlight beach/outdoor/nature, arts and culture, and neighborhoods while avoiding crowded imagery
- Continue to emphasize Miami's unique cosmopolitan experience as a differentiator from other Florida cities
- Showcase the broad array of Miami hotel, restaurant, and spa, attractions, and museum deals that will be available

*\*Transition date between Pre-Recovery and Recovery campaigns will be fluid depending on hotel opening dates*

## MANIFESTO

Greater Miami is all about vibrance and energy. And we could all use a little of both. It's also about life-affirming positive vibes, full-on optimism, and the can-do attitudes of our people and our city.

It's a place where sunrise and sunsets are equally radiant, where cafecito hour brightens our afternoons, and where luminous, moonlit skies light up the night.

That's how we shine, every single day of the year. And that bright, beautiful, sun-drenched attitude permeates everything, every place, and everyone in our destination.

And it will await you. Ready for you to explore, discover and enjoy.  
We stand by you, as you stand by.

So come shine with us...all you adventurers, beachgoers, foodies, music fanatics, culture seekers, and art lovers.

**Let's shine.**



MIAMI  
*shines*

GREATER MIAMI AND THE BEACHES



The Official Site of Greater Miami and the Beaches

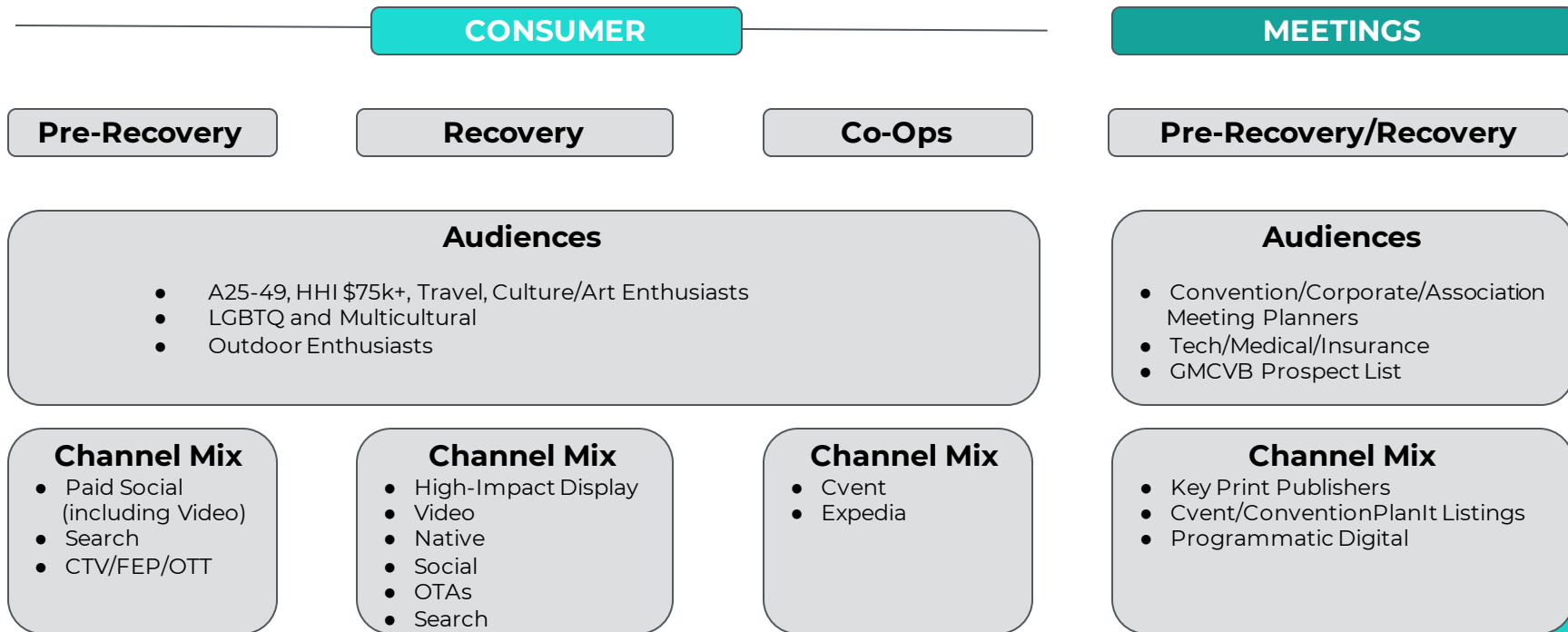
English ▾

Login



[www.GMCVB.com/MiamiShines](http://www.GMCVB.com/MiamiShines)

# Miami Shines Program Snapshot



## Miami Shines Consumer: Pre-Recovery

Screenshots are examples only.  
Creative is in development.

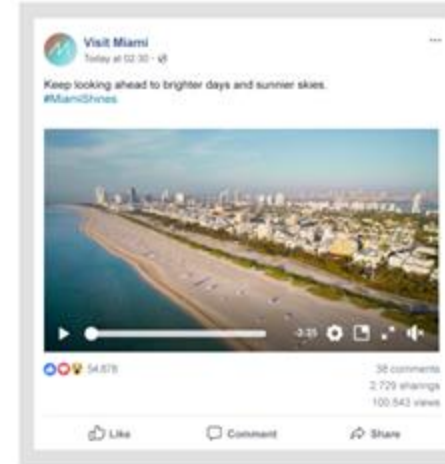
April 15 -  
Hotel Opening

### Objective

Keep Miami top-of-mind as a travel destination

### Approach

- Focus on cost-effective and engaging paid social, internet-connected TV and paid search to drive awareness/interest
- Integrate paid and organic posts on Facebook, Instagram, Twitter and Pinterest
- Leverage the Miami Shines Pre-Recovery video in :60, :30 and :15 spots



Social Media



Connected TV



# Miami Shines Consumer: Pre-Recovery Social Media

Paid and Organic

## User-Generated Content: How Does Miami Shine for You?

We will invite users to share their own posts that demonstrate the Miami Shines concept across social by tagging us and using #MiamiShines.

The GMCVB will share the best posts on Instagram, Facebook and Twitter, and Instagram stories

## Miami Shines Spotlights

Continue to shine a light on local attractions, businesses, and the resilient resourceful people of Miami by highlighting the many events created by our partners and community.

### For example:

- Yoga and meditation put on by a local spa
- Cafecito making by a local restaurant
- Salsa, bachata, etc dance sessions



## User-Generated Content

Screenshots are examples only. Creative is in development.



### Event Spotlight

Channel some #MiamiShines from home with a refreshing yoga session! ♀♂

Screenshots are examples only.  
Creative is in development.

# Consumer: Miami Shines Recovery

Hotel Opening -  
Sept 30



Expedia Marquee & Custom Landing page

## Objective

Increase consideration and drive visitation to Miami

## Approach

- Phase I: Concentrate first 4 weeks in the Miami/Florida/Georgia drive market
- Phase II: Expand to US to drive engagement and hotel bookings
- Mix of display, video, native, social & paid search for immediate reach including high impact units and video
- Broad mix of OTA booking programs with high profile placements and deals pages
- Sequential creative - destination ads followed by targeted deals messaging



Travelzoo  
Featured  
Destination  
Program

Display/Video Ads



# Consumer: Miami Shines Recovery Special Offers & Updated Amenities

We will leverage the GMCVB's Temptations program infrastructure in order to:

## Solicit special offers from all Greater Miami and the Beaches

- Attractions
- Museums
- Hotels
- Spas
- Restaurants



## Capture new amenities details to enhance your Miami and Beaches partner listings, such as:

- Pausing of resort fees
- Flexible cancellation policies
- Special amenities such as “breakfast to go”
- Property cleanliness protocols

# Miami Shines Meeting Planners: Pre-Recovery & Recovery

## Objective

Reignite interest in Miami for bookings meetings and conventions

## Approach: Miami Shines Pre-Recovery

- Maintains presence on meeting planner listing sites such as Cvent and Conventionplanit.com to keep Miami top-of-mind when planners are researching
- Leverage the Miami Shines Pre-Recovery video

## Approach: Miami Shines Recovery

- Expand reach with established Meeting Planner key publishers with print and digital schedules and mix of eNewsletters and native ads
- Increase use of video and digital presence



**CVENT  
Diamond  
Plus Ad**

### The GMCVB Stands By You.

We remain grateful for your continued partnership. Relationships are what this industry is all about, and we value each and every one of ours. As we look forward to future visits from our friends and partners, we are continuing our mission to keep Miami shining. For further assistance, please feel free to contact us: Tel: 1-800-933-8448 | Email: [miamimeetings@gmcvb.com](mailto:miamimeetings@gmcvb.com).

The advertisement features a large image of the Miami Beach Convention Center with palm trees in the foreground. Below the image is the logo for 'MIAMI GREATER MIAMI AND THE BEACHES'. The main headline reads: 'MIAMI, A WORLD-CLASS CITY WITH A FIRST-CLASS CONVENTION CENTER'. The text below describes the center's facilities, including 100,000 square feet of flexible exhibit space, 45,000 square feet of ballroom space, and 400 rooms. It also mentions that the center is a 10-minute walk from the beach and offers more than 400 flights from around the globe daily. At the bottom, there is a red button that says 'LEARN MORE ABOUT MIAMI'.

## How Does Miami Shine to You?

**The GMCVB seeks to showcase a broad variety of social content that supports all areas of Miami and includes a diversity of experiences.**

**The Ask:**

Show us how Miami Shines for you and your area. Post on Instagram, Facebook through your feed or through stories.

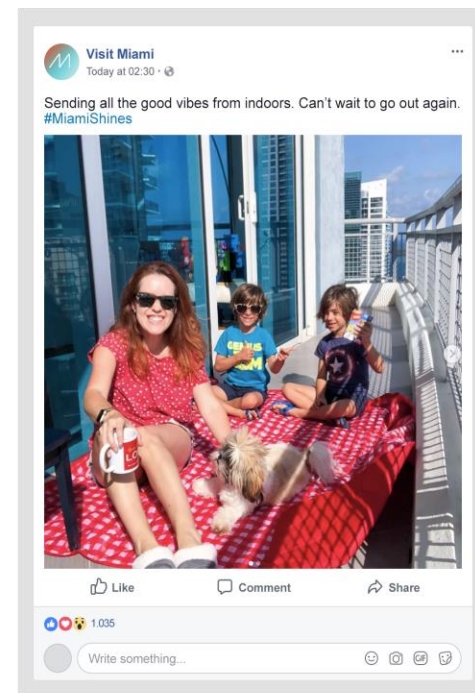
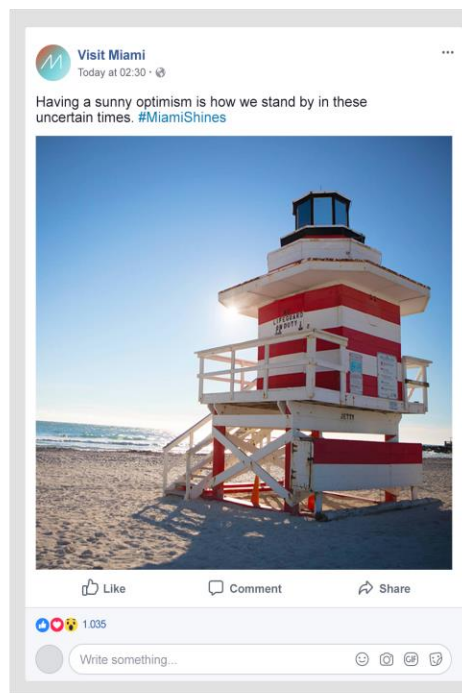
Tag @miamiandbeaches and include #MiamiShines

Examples may include:

- Virtual events
- Businesses open for ordering/delivery
- Images of residents making the best of sheltering in place – home work/school setups, socially distant walks, balcony performances, etc.
- Heartwarming interactions (from a safe distance) that showcase Miami’s positive attitude

The GMCVB may then share your content across applicable social channels.

Please link to <http://www.gmcvb.com/miamishines> when applicable.



# Sports & Entertainment Venue Guide



\* Draft \*

**Expected delivery date:** June 24, 2020



\* Draft \*

## Save the Date

### Greater Miami Convention & Visitors Bureau 2020 State of the Travel & Tourism Industry Forum



**Date:** Thursday, May 14, 2020

**Time:** 9:00 a.m. – 10:30 a.m.

*\* Virtual Meeting Registration Details Coming Soon \**



**FEEDBACK**



An aerial photograph of a beach scene. The ocean is a vibrant blue, transitioning from a shallow turquoise near the shore to a deeper blue further out. A long pier extends into the water. The beach is sandy and populated with many people. A large number of blue beach umbrellas are lined up along the water's edge. To the right, a row of modern, multi-story high-rise buildings with balconies and glass facades runs along the coast. The sky is clear and blue with a few wispy clouds.

**THANK  
YOU**