The engagement and support of stakeholders is instrumental to our success and several new benefits and strategies have been developed to heighten communication, accessibility, education and awareness of the organization and industry. In addition, the ability to connect Long Island visitors to our partners is the core function of any tourism promotion agency. The recent merger of Partner and Visitor Relations provides the missing link that enhances both the visitor experience and the partner benefit. The department has strong momentum and looks to continue its growth by enhancing the stakeholder and visitor experience.
Discover Long Island® is the official regional organization charged with furthering the $5.9 billion tourism economy. The organization contributes to the economic development and quality of life on Long Island by promoting the region as a world-class destination for visitors, meetings and conventions, trade shows, sporting events and related activities.
BOARD OF DIRECTORS

Chair
Paul Monte
Gurney's Resort

Vice-Chair
Gloria Rocchio
The Ward Melville Heritage Organization

Secretary
Bryan Deluca
Atlantis Holdings LLC

Treasurer
Nancy Costopulos
Old Westbury Gardens

Immediate Past Chair
Steve Bate
Long Island Wine Council

County Representatives:
Regina Zara
Suffolk County Dept. of Economic Development and Planning

Andrew Goldstein
Nassau County Representative

George Gorman
NYS Parks- LI Region

Matthew Cohen, Esq.
Long Island Association

Mitchell Pally
Long Island Builders Institute

J. Grady Collin
Garden City Hotel

Alan Fairbairn, CHIA CHA
New York Institute of Technology

Gail Lamberta
St Joseph's College

Nancy Gilbert
Simon/Roosevelt Field Mall

Shelley LaRose Arken
Long Island MacArthur Airport

Gary Lewi
American Air Power Museum

Wilfred Joseph
Arbor View House B&B

Kristen Reyes
Hotel Indigo East End

Marc Weinstein
Mark of Elegance

Laura Mercogliano
Palms Hotel Group

Terrie Sultan
Parrish Art Museum

Duncan Kennedy
Duncan Inn

Gus Montesantos
Hilton Long Island

Michael Papierno
Samar Hospitality

Tom Hermann
Dune Management

Victor Scotto
Scotto Brothers/Chateau Briand

Dorothy Roberts
Oxford Hospitality Group

Mark Irgang
Long Island Hospitality Association

Cara Longworth
NYS Economic Development

Kristen Jarnagin
Discover Long Island
DISCOVER LONG ISLAND TEAM

Executive Office

Kristen Jarnagin
President & CEO

Sharon Wyman
Director of Administration

Katherine Peterson
Administrative Coordinator

Marketing & Sales

Jamie Claudio
Vice President, Marketing & Sales

Maggie Lacasse
Director of Communications

Alyssa Paxton
Digital Media & Design Strategist

Rose Diliello
Sales Manager

Jennifer Rothman
Domestic, International and Sports Sales Manager

Nicole McElroy
Assistant Manager, Marketing & Sales

Partner & Visitor Relations

Nikki Theissen
Director of Partner & Visitor Relations

Mary Monsees
Brand Ambassador

Aida Jackson
Information Services Coordinator
A MESSAGE FROM THE PRESIDENT

The Discover Long Island team has already embarked on several new initiatives to kick off what is certain to be another exciting year for our industry, filled with advancements in our approach to marketing, advertising, sales and international outreach. Last year, tourism's economic impact on Long Island reached new highs with $5.9 billion in visitor spending and more than $725 million generated in state and local tax revenue. We anticipate 2019 will continue that momentum and Discover Long Island is positioning Long Island's Tourism industry for success with the following initiatives:

- A new commissioned study by Longwoods International on the "Perception of Long Island" from key national markets for tourism and business attraction.
- New Virtual Reality video created by a renowned IMAX filmmaker that showcases Long Island's beaches, boardwalks, historic mansions, gardens and vineyards.
- A new destination marketing campaign that will include video, digital, print and social media concepts showcasing Long Island's unique, year-round appeal.
- Alignments with NYC&Co in the meetings market with partnerships at ASAE and IMEX.
- Strong Long Island presence at the NY Times Travel Show and the first-ever Newsday Travel Show taking place at the Nassau Coliseum.
- Activations across the region with our new Mobile Visitors Center, "Lili."
- Increased international exposure and cooperative marketing opportunities in Canada, Australia, Germany and the UK.
- A global spotlight on the region during our signature world-class events including World Pride, the PGA National Championship and the Belmont Stakes.
- Continued collaboration with Long Island's MacArthur Airport to increase visibility in the Washington D.C. and Baltimore markets.
- Advancements in positioning Long Island as a year-round destination with targeted seasonal marketing.
- Advanced networking and educational opportunities, including industry mixers, meetings, symposiums, presentations and our new annual Awards Gala.

We have set the bar high for 2019 and your invested partnership is the foundation for all of our efforts. Thank you for your continued support and partnership in making Long Island a leading destination to visit, work and live.
After two successful years under an organizational re-brand, Discover Long Island’s 2019 marketing strategy will seek to carry through on the momentum built by the Long Island regional marketing approach while forging ahead to bring awareness and conversion of brand-new consumer market bases, both domestically and abroad.

The strategy builds further positive awareness and visitation out of key markets for the organization by offering new, unique ways to access and experience Long Island across digital, mobile and experiential channels. In addition, the organization will continue to broaden the reach to prospective visitors in new markets by targeting cities who meet the demographic profiles resulting from extensive research.

Key messaging components will be focused on promoting Long Island’s premiere assets that allow it to lay claim as a desired destination to play, live and work with a focus targeting long-haul visitors during peak season and local/regional travelers during shoulder and low seasons. In addition, aligning tourism promotion with economic development opportunities supports our transportation and business hubs.
CORE COMPONENTS OF MARKETING/ADVERTISING STRATEGY

- Reaching New Audiences
- Highlighting Cultural Assets
- Driving Visitation During Need Times
- Research and Measurement
- A Digital Strategy
REACHING NEW AUDIENCES

Data from the 2018 Long Island Perception Study revealed new insights on how consumers and business travelers viewed both the destination as well as the offerings found here and their perceptions of and attitudes towards Long Island as a whole. Based on this research and an effort to increase positive perception and in some cases, correct misconceptions, Discover Long Island® will unveil a new, fully cohesive, data-driven advertising and marketing campaign in 2019.

The campaign utilizes high impact visuals from almost forty locations, both video and photography, to raise awareness of not only the Long Island visitor assets on offer, but also the culture and lifestyle of the Island that sets it apart from other beachfront destinations. This campaign is strategically designed to showcase both a beautiful place to visit and an incredible place to live but also aims to define the unique character of our destination through emotional branding.

Long Island’s Image: Recent Visitors vs. Non-Visitors

Long Island’s Image Weaknesses vs. Combined Competition

*Attributes marked with a chevron indicate some of the most important image hot buttons for a place to live.
HIGHLIGHTING CULTURAL ASSETS

Findings from the Perception Study show that while Long Island name recognition is high, the awareness of our many historic and cultural assets on offer is low. Long Island is an incredibly rich destination in these areas with deep history ranging from The Washington Spy Trail to the Grumman Aerospace engineers to Walt Whitman and beyond. Renowned cultural institutions from Parrish Art Museum to Cradle of Aviation and more also play a key role in making the destination such a unique place to experience. Emphasis promoting these stories and institutions remains a core marketing component while highlighting off season cultural events such as Winterfest and THAW allows for a year round cultural marketing approach.
DRIVING VISITATION DURING NEED TIMES

While the new campaign will serve to open wider audiences to the Long Island experience, an essential anchor to the organization's marketing mix will be to continue to reinforce positive perception and conversion in markets that previous campaigns have been able to successfully execute in. Historically, the organization has focused on drive and regional markets domestically so awareness, and conversion, within the northeast is higher than in other parts of the country. We will continue to serve these audiences with marketing initiatives, including new campaign messaging, as well as unveil new offerings including virtual reality video assets and the newly launched Lili mobile visitors center at high impact consumer events in the region.

The annual marketing strategy includes a focus on long haul travelers during peak season, targeting those who stay longer and spend more. During the off season and during heavier need times, marketing strategy turns to focus on those regional travelers as well as promoting staycations to locals. This bi-focused alignment allows us to drive a year round tourism message while ensuring peak season travel messaging is geared towards more lucrative visitors who spend midweek time in the destination.
RESEARCH AND MEASUREMENT

Research will continue to dictate marketing decisions and creative direction to target the key markets and demographics for the highest propensity to inquire about Long Island tourism and economic development opportunities. Conversion studies of Discover Long Island marketing collateral indicate the effectiveness of those materials in driving successful strategy. In addition to tracking standard KPIs (key performance indicators) for marketing initiatives, Discover Long Island will continue to work with research platforms ADARA and Arrivalist that utilize ground breaking technology to directly connect digital marketing efforts with the conversion of visitors to the destination. These partnerships allow the organization to show actual revenue generated by consumers touched and converted by the organization's marketing endeavors.
A DIGITAL STRATEGY

Mobile, video and online usage continues to increase and has become the leading source for travel information and engagement. These benefits allow Discover Long Island to maximize limited marketing funding with targeted messaging and trackable results, justifying a greater emphasis on digital marketing, while still maintaining a foundation of traditional marketing initiatives.

While Search Engine Optimization and Pay-Per-Click campaigns continue to drive underpinnings of digital success, video will play a major focus in 2019. According to Forbes, 88% of online consumers spend more time on sites with video; a further 95% of viewers retain information they watch in a video as compared to 10% who read it in text. Discover Long Island will continue to leverage this usage trend by enhancing 360 degree video content live on its partner landing pages and Google sites, creating custom video blog content in place of written biogs, and distributing virtual reality offerings.
SOCIAL MEDIA

Discover Long Island is creating engaging, lively content and story sharing that warrants consumer engagement. Our social marketing strategies offer followers the ability to participate and engage in the brand as opposed to only receiving static messaging. The ever-evolving digital realm offers multiple opportunities and social platforms for us to engage with users.

OBJECTIVES

Identify and utilize social influencers and travel writers to help share our brand story.

Partner with ILoveNY on cross-handle promotion for broader destination endorsement.

Share weekly content on Insider’s Guide, the official Discover Long Island blog, the premier source for Long Island travel inspiration.

Promote the destination and its special events with “social takeovers” for fresh original content through the lens of influencers.

Showcase partners and promote a local ‘Staycation’ based marketing focus during the off-peak travel season.

Over 264,000 page likes and 253,000 page follows.

Over 13,300 followers from organic growth.
Our primary digital platform, the Discover Long Island website, continues to serve as an essential component in our marketing strategy. The site continuously undergoes redesigns to enhance its architecture, imagery, navigation and performance. New strategies have been developed to implement updates incorporating organized mapping and functionality to create a seamless user experience. Clearly defined goals were set to allow users the ability to navigate through pages easily to find information and be fully immersed in the Long Island experience. These efforts drive more than 1.3 million unique visitors to the website annually.
Discover Long Island contracts with digital agency, BLKDG, to provide robust year-round Search Engine Optimization and Pay-Per-Click strategies designed to elevate the website’s digital presence and time on site.

The UTrip itinerary creation platform allows prospective visitors to build out the perfect vacation experiences based on traveler interest and budget. New in 2019 is a complete website integration of the itinerary builder where each partner landing page will now include the option to be added to an itinerary.

Threshold360 showcases 360 degree video experiences for each partner landing page to enhance the site’s visual offerings. Including video on a landing page increases conversion by 80% and almost 50% of online users look for videos related to a product or service before choosing to purchase.

The Localist events platform provides Discover Long Island partners with more enticing and interactive ways to promote their posted events by offering consumers the ability to purchase tickets directly, save events to their calendars and share with friends on their social channels. The events page is the second most visited page on the site, receiving over 67,000 views per month.

CrowdRiff incorporates User Generated Content (UGC) directly into the website experience by allowing Discover Long Island to share relevant photography assets for Long Island posted by users on social channels such as Instagram on various landing pages. This photography not only shows the unique visitor experiences offered on Long Island but also allows the organization to showcase those experiences with the third party credibility that potential visitors seek before choosing to book an experience or vacation.
A SEASONAL APPROACH

As Long Island is a seasonal destination for non-Island residents, our advertising initiatives reflect informed choices in target audiences and the platforms most likely to reach them. During off peak periods - late fall, winter and early spring - we focus our messaging towards local and regional drive-market visitors and encourage them to take advantage of unique events, fewer crowds and discounted pricing and packages. This drives a continued economic impact during a time when visitors from other regions are less likely to book stays.

We opt for outlets that have large audiences across Nassau and Suffolk counties, the tri-state region and the Northeast region; our winter 2018 campaign, "Tis the Season to Discover" ran digital placements on Newsday.com and Facebook carousel ads geo-targeted to Long Islanders and residents of New York City, upstate New York, New Jersey and Connecticut. During peak season, our advertising strategy switches track and we place in outlets that reach a wider audience - national and international. We promote assets that bring in our core visitors like beaches, wine country, craft beverages, culinary, family fun and adventure experiences.
World Pride, the largest LGBTQ celebration in the world, makes its first ever appearance in the United States in 2019. Taking place in New York City, this global event is set to bring in millions of additional international visitors to our region in June, marking an important opportunity to reach international audiences by leveraging the already increased awareness of and visitation to New York. Discover Long Island will be maximizing this opportunity through enhanced activations with two key partners for the organization, the LGBT Network and New York City & Company.

We are partnering with the Long Island LGBT Network to create and promote Long Island as the "Official Kick-Off Destination to World Pride" by moving Long Island's Pride on the Beach festival in Long Beach to the weekend before World Pride in New York City and creating a week long series of events designed to bring visitors out to the eastern end of Long Island with activations such as "Pride in the Vines" in Long Island Wine Country and "Pride in the Hamptons" on Long Island's South Fork and moving westward with "Pride on Fire Island" and more, ultimately ending with visitors heading from Long Island into the city for World celebrations. Further, Discover Long Island is partnering with NYC&Co. for Long Island presence on the city's official World Pride website as well as a heavy mix of cross-destination marketing initiatives aimed at drawing World Pride travelers out to experience Long Island's LGBTQ activations.
Discover Long Island announced a first ever partnership with the official OMO of the five boroughs, New York City & Company. In 2019, the two organizations have taken this partnership model a step forward and have entered into a historic first three-way marketing partnership by adding the Long Island Rail Road as a marketing partner. Each of the three organizations will receive marketing support and assets from another organization in the partnership with NYC&Co. offering New York City assets such as bus shelter advertising inventory to Discover Long Island, the Long Island Rail Road offering digital kiosks and advertising boards to NYC&Co. and Discover Long Island offering digital and on-site consumer activation points to the Long Island Rail Road. These in-kind trades save hundreds of thousands of dollars for the organizations and provide valuable exposure points with the ability to further connect Long Island to New York City with the Long Island Rail Road as the best transportation between the two.
Long Island MacArthur airport partners with Discover Long Island on campaign

The partnership marks the first time the airport will advertise in regions beyond Nassau, Suffolk and New York City. The campaign kicks off with an ad blitz in Baltimore.

Town and County officials, in partnership with Discover Long Island, today unveiled an industry-leading cooperative marketing campaign between MacArthur Airport and Discover Long Island, at an announcement made at Island MacArthur Airport.

The new, multi-faceted cooperative marketing initiative, "Short Flight. Long Island." slogan is designed to build awareness of Long Island as a destination and increase demand for MacArthur Airport as a go-to hub. The details of this campaign were made available by Angie Carpenter, Islip Town Supervisor; Steve Bellone, Suffolk County Executive; Shelley LaRose-Ayken, Airport Commissioner; and Kristen Jarnagin, President/CEO of Discover Long Island, elected officials, business leaders, and local tourism stakeholders. The Baltimore/Washington D.C. market will serve as the initial target region for this campaign based on research, population, and frequency of service.

Discover Long Island and Long Island MacArthur Airport Forge New Marketing Collaboration Promoting Destination and Airport

Long Island MacArthur airport has launched a new marketing campaign with Discover Long Island, in hopes of boosting tourism on LI. Video by Nick Musumeci.

Discover Long Island and Long Island MacArthur Airport Forge New Marketing Collaboration Promoting Destination and Airport

Town and County officials, in partnership with Discover Long Island, today unveiled an industry-leading cooperative marketing campaign between MacArthur Airport and Discover Long Island, at an announcement made at Island MacArthur Airport.

The new, multi-faceted cooperative marketing initiative, "Short Flight. Long Island." slogan is designed to build awareness of Long Island as a destination and increase demand for MacArthur Airport as a go-to hub. The details of this campaign were made available by Angie Carpenter, Islip Town Supervisor; Steve Bellone, Suffolk County Executive; Shelley LaRose-Ayken, Airport Commissioner; and Kristen Jarnagin, President/CEO of Discover Long Island, elected officials, business leaders, and local tourism stakeholders. The Baltimore/Washington D.C. market will serve as the initial target region for this campaign based on research, population, and frequency of service.

Click here for more

The partnership marks the first time the airport will advertise in regions beyond Nassau, Suffolk and New York City. The campaign kicks off with an ad blitz in Baltimore.

Town and County officials, in partnership with Discover Long Island, today unveiled an industry-leading cooperative marketing campaign between MacArthur Airport and Discover Long Island, at an announcement made at Island MacArthur Airport.

The new, multi-faceted cooperative marketing initiative, "Short Flight. Long Island." slogan is designed to build awareness of Long Island as a destination and increase demand for MacArthur Airport as a go-to hub. The details of this campaign were made available by Angie Carpenter, Islip Town Supervisor; Steve Bellone, Suffolk County Executive; Shelley LaRose-Ayken, Airport Commissioner; and Kristen Jarnagin, President/CEO of Discover Long Island, elected officials, business leaders, and local tourism stakeholders. The Baltimore/Washington D.C. market will serve as the initial target region for this campaign based on research, population, and frequency of service.

Click here for more
In 2018, Discover Long Island and Long Island MacArthur Airport forged a first ever partnership designed to increase inbound traffic to Long Island by way of Long Island MacArthur Airport. Based on opportunity, the Baltimore, Maryland/Washington D.C. markets were chosen to conduct a six-week multi-platform marketing campaign to drive awareness and positive opinion about both the destination and the airport. Through benchmark studies, the campaign was able to establish a 70% increase in market awareness for Long Island MacArthur Airport and a 44% increase in intent to visit Long Island coupled with a 50% increase in intent to utilize Long Island MacArthur to arrive here.

The campaign earned two national awards for integrated marketing, a U.S. Travel Association ESTO Destiny Award and a Hospitality Sales and Marketing Association International (HSMAI) Gold Adrian Award. Continued reinforcement of messaging in market is crucial to remain top of mind for consumers and a follow-up campaign will be conducted in market from April-May 2019.
COMMUNICATIONS/PUBLIC RELATIONS

By aligning with strategic editors and influencers in the international and domestic media landscape, Long Island has elevated its destination messaging and visibility with press hits reaching an audience of over 570 million this past year. Curated content and tactical storytelling have allowed Discover Long Island to support destination partners and critical need periods such as mid-week and off-season travel to proven domestic and top international markets including: Germany, U.K., Australia and Canada. A continued emphasis will be placed on garnering global attention surrounding Long Island’s Signature Events for 2019 such as World Pride and the 101st PGA Championship, leveraging these widely viewed events and showcasing Long Island as a global “must-visit” destination.

Discover Long Island’s communication team regularly fields reactive and proactive media queries pitching destination assets for inclusion within upcoming stories and roundups as well as organizes group and individual media visits year-round to ascertain larger, feature length coverage in target publications. In addition, Discover Long Island continues to align with regional partners, I LOVE NEW YORK and NYC & CO, to provide partners with seasonal media event and trade show opportunities.
CORE COMPONENTS OF COMMUNICATIONS & PUBLIC RELATIONS EFFORTS

- News Bureau
- Visiting Journalist Program
- Influencers are the New Editors
- Photography Assets
An effective News Bureau allows Discover Long Island to elevate news from the destination to the proper channels, creating exciting media-driven initiatives that garner greater awareness of the region as a whole. A vital tool for our communications department, the News Bureau is where we create and disseminate news-worthy press releases, quarterly "What's New" updates, and notable roundups. We distribute a bi-weekly consumer newsletter to over 39,000 opt-in subscribers delivering an overview of regional news and events as well as a weekly tourism newsletter that goes out to our partners highlighting organizational news, opportunities and industry updates as well as a quarterly sales newsletter distributed to meeting planners and sports events rights holders. In addition to distributing news the department regularly connects with national and international media, ensuring Long Island is kept top-of-mind for both short and long-lead stories.

In collaboration with syracuse, Discover Long Island is currently working on the 2019 Long Island Travel Guide which is set for distribution in March 2019. This official travel guide is the only hard copy collateral given out at the Island’s Welcome Center which serves up to 5,000 visitors per day and is also distributed by consumer request nationally and internationally each year. With over 125,000 copies printed annually, the guides are distributed to local businesses, handed out at both consumer and meeting planner trade shows, to travel agents and distributed to New York State information centers and at subway rest stops in the northeast region. In addition to the printed copies, a digital Long Island Travel Guide will be made available at DiscoverLongIsland.com where it receives thousands of downloads annually. Discover Long Island partners receive special advertising rates; placements must be reserved no later than January 20, 2019. For more information, contact jeff@smartermeets.com. To book your ad space please contact syracuse’s James Rosenthal at jrosenthal@syraucuse.com or 813.814.2680.

DISCOVER LONG ISLAND MEDIA PLACEMENT:

Long Island: Events You Need to Know About

In collaboration with syracuse, Discover Long Island is currently working on the 2019 Long Island Travel Guide which is set for distribution in March 2019. This official travel guide is the only hard copy collateral given out at the Island’s Welcome Center which serves up to 5,000 visitors per day and is also distributed by consumer request nationally and internationally each year. With over 125,000 copies printed annually, the guides are distributed to local businesses, handed out at both consumer and meeting planner trade shows, to travel agents and distributed to New York State information centers and at subway rest stops in the northeast region. In addition to the printed copies, a digital Long Island Travel Guide will be made available at DiscoverLongIsland.com where it receives thousands of downloads annually. Discover Long Island partners receive special advertising rates; placements must be reserved no later than January 20, 2019. For more information, contact jeff@smartermeets.com. To book your ad space please contact syracuse’s James Rosenthal at jrosenthal@syraucuse.com or 813.814.2680.

DISCOVER LONG ISLAND MEDIA PLACEMENT:

(No content available in this section)

DISCOVER LONG ISLAND MEDIA PLACEMENT:

(No content available in this section)
VISITING JOURNALIST PROGRAM

One of the most results-driven ways to ensure Long Island is included within top stories around the globe is to have media come and experience our way of life first hand. Seeing is believing and authentic experiences often evoke larger and more enthusiastic coverage. A robust visiting journalist program ensures top writers experience Long Island’s main attractions, telling our region's different stories through curated itineraries and partner engagement.
INFLUENCERS ARE THE NEW EDITORS

The media landscape is ever-evolving, and the digital world is palpable. Discover Long Island’s Communications Department places a heavy focus on digital influencers, vetting results-driven investments to effectively manage a worthwhile campaign for the destination. In 2018 our efforts in this realm garnered award-winning results, affording our team a coveted industry Adrian Award from the Hospitality Sales & Marketing Association International (HSMAI) for landing live coverage of Long Island’s 150th running of the Belmont Stakes on Travel + Leisure’s social media channels, reaching over 3.4 million travel enthusiasts.
PHOTOGRAPHY ASSETS

Discover Long Island has been working to build our photography assets, capturing new-wave photography and videos that elevate social media offerings, advertising campaigns and publicity use that is attracting to new markets. Not only are these assets used for organizational use, but partners kept assets for internal promotional use as well allowing them to grow individual platforms at no additional cost.
Discover Long Island public relations reached an audience of 104,210,947. 2019 PR goals include an earned media reach of over 200 million, and 150 articles.
<table>
<thead>
<tr>
<th>Event</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>IMM NEW YORK</strong></td>
<td>Jan. 24</td>
</tr>
<tr>
<td>International Media Marketplace (IMM) is an established international conference that connects top tier media with travel and tourism brands. IMM has played host to over 2,500 international media and 1,425 exhibiting companies since 2013. Discover Long Island will have appointments with top international and domestic media.</td>
<td></td>
</tr>
<tr>
<td><strong>NEW YORK TIMES TRAVEL SHOW</strong></td>
<td>Jan. 25</td>
</tr>
<tr>
<td>The NYTimes Travel Show is the largest consumer travel show in the world, welcoming over 30,000 people over three days to the Javits Center in NYC. Discover Long Island will participate in Media Day alongside the organization’s show cooperative partners, the LIRR, The Hamptons, North Fork, Montauk and the North Shore. The organization and each region will have the opportunity to share destination stories and highlights with dozens of journalists and media attendees.</td>
<td></td>
</tr>
<tr>
<td><strong>IMM BERLIN</strong></td>
<td>Mar. 5</td>
</tr>
<tr>
<td>International Media Marketplace (IMM) is an established international conference that connects top tier media with travel and tourism brands. IMM has played host to over 2,500 international media and 1,425 exhibiting companies since 2013. Discover Long Island will have appointments with top international and domestic media.</td>
<td></td>
</tr>
<tr>
<td><strong>ITB BERLIN</strong></td>
<td>Mar. 6-10</td>
</tr>
<tr>
<td>Discover Long Island will attend The International Travel Show Berlin (ITB). ITB is an annual trade show that involves more than 50,000 tourism professionals from around the globe, including travel agents, tour operators and international and domestic media. Pre-scheduled appointments are arranged through Long Island’s German PR representatives, connecting our destination with top international and domestic media.</td>
<td></td>
</tr>
<tr>
<td><strong>IMM UK</strong></td>
<td>Mar. 25</td>
</tr>
<tr>
<td>International Media Marketplace (IMM) is an established international conference that connects top tier media with travel and tourism brands. IMM has played host to over 2,500 international media and 1,425 exhibiting companies since 2013. Discover Long Island will have appointments with top international and domestic media.</td>
<td></td>
</tr>
<tr>
<td><strong>GERMAN MEDIA FAM</strong></td>
<td>Spring 2019</td>
</tr>
<tr>
<td>In collaboration with our German PR representatives, Discover Long Island will host 5-6 key media from the German region along with an Agency host. The journalists will experience a sampling of quintessential Long Island experiences to shape their confirmed stories in the travel, culinary and lifestyle realm.</td>
<td></td>
</tr>
<tr>
<td><strong>IPW ANAHEIM</strong></td>
<td>Jun. 1-5</td>
</tr>
<tr>
<td>IPW is the largest and most important international trade show held in the United States. Discover Long Island will have appointments with top international and domestic media and tour operators from Asia, Australia, Canada, Germany, Latin America, Mexico and United Kingdom.</td>
<td></td>
</tr>
<tr>
<td><strong>PRSA TRAVEL &amp; TOURISM CONFERENCE</strong></td>
<td>Jun. 16-19</td>
</tr>
<tr>
<td>This annual conference offers communications professionals in the travel and tourism arena the opportunity to learn about industry trends, technology and best practices from their peers as well as top travel media.</td>
<td></td>
</tr>
<tr>
<td><strong>WORLD PRIDE</strong></td>
<td>Jun. 2019</td>
</tr>
<tr>
<td>2019 marks the first time this international event will take place in the United States. With NYC anticipating an additional million incoming international visitors in June, the event presents an exciting opportunity for Long Island to attract an array of international media outlets to experience Long Island and the organization will proactively be pitching story placements and encouraging FAM trips surrounding this world-wide event taking place in our backyard.</td>
<td></td>
</tr>
<tr>
<td><strong>UK MEDIA FAM</strong></td>
<td>Fall 2019</td>
</tr>
<tr>
<td>In collaboration with our UK PR representatives, Discover Long Island will host 5-6 key media from the UK region along with an Agency host. The journalists will experience a sampling of quintessential Long Island experiences to shape their confirmed stories in the travel, culinary and lifestyle realm.</td>
<td></td>
</tr>
<tr>
<td><strong>WORLD TRAVEL MARKET</strong></td>
<td>Nov. 4-6</td>
</tr>
<tr>
<td>World Travel Market London is the leading global event for the travel industry. Over three days, the travel industry comes together as almost 5,000 exhibiting destinations, technology and private sector companies to find and network with 51,000 travel professionals, key industry operators, journalists, and digital influencers</td>
<td></td>
</tr>
<tr>
<td><strong>I LOVE NY SEASONAL MEDIA EVENTS</strong></td>
<td>Ongoing</td>
</tr>
<tr>
<td>I LOVE New York seasonal media events. Representatives from across New York State will be on hand to showcase the array of seasonal activities, attractions and destinations throughout the state to key New York media.</td>
<td></td>
</tr>
</tbody>
</table>
MEETINGS & CONVENTION

Meetings and Group travel are a critical component for Long Island and one of the leading growth sectors for tourism in 2019, according to Smith Travel Research (STR). Combining the Sales and Marketing teams and initiatives in 2018 has proven a successful merger for providing greater exposure of the meeting opportunities on Long Island as well as driving increased lead generation. Enhanced engagement with stakeholders in the destination is critical to ensure that leads generated fit the needs of our business community, and a greater emphasis will continue be placed on lead conversion as opposed to leads generated. Based on the current space availability in the destination, Long Island’s key meetings market currently comes from small market meetings and incentive group business. Sales efforts focusing on the association and boutique/retreat markets will be the priority for lead generations. Integrated strategies to utilize marketing efforts for lead generation in key meetings destinations, such as Washington DC, New York City, and Boston will be a focus for the organization in 2019.

<table>
<thead>
<tr>
<th>Booked Sales Leads</th>
<th>2018 Sales Economic Impact</th>
<th>Projected Economic Impact in 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>82</td>
<td>$2.2 Million</td>
<td>$2.5 Million</td>
</tr>
</tbody>
</table>
CORE COMPONENTS OF MEETINGS & CONVENTION STRATEGY

Travel and Trade Shows

Aligning with New York Partners

New Targeted Outreach
TRAVEL AND TRADESHOWS

Ensuring a presence at key trade shows for client leads is a core function of sales for a destination. Duplication of sales team members at trade shows has been eliminated and new reporting structures have been implemented to measure the benefits of attendance and to determine future sales strategies. More focus has been placed on cooperative opportunities for trade shows to allow stakeholders to participate and leverage dollars.

The merger of the Discover Long Island marketing and sales teams also allows for greater leveraging of marketing opportunities surrounding these shows and programs to ensure Long Island maximizes presence at each show attended.
ALIGNING WITH NEW YORK PARTNERS

The 2019 strategy will continue to maintain foundational support with statewide and upstate associations such as NYSDMO and I LOVE NY. Additionally, based on the success and momentum of partnering with New York City & Company on sales trade shows and programs will remain a key focal point for 2019. The vast differences in the destinations coupled with their proximity allow for a harmonious relationship of lead passing and sharing while allowing Discover Long Island to continue to harness the name awareness and brand recognition of NYC and leverage greater awareness of its "beachfront backyard" offerings on Long Island in the minds of planners and rights holders.

I ♥ NY
ilovery.com
NYS Destination Marketing Organizations
NYC
& Company
nycgo.com
NEW TARGETED OUTREACH

While trade shows and communications distributions like the quarterly e-newsletter to meeting planners and sports events rights holders, new e-outreach for trade show follow up and targeted advertising and marketing placements will continue in 2019. An outreach approach of creating intimate get-togethers, informational meetings, and one-on-one meetings with planners and rights holders will play a larger focus this year. These smaller, targeted, invitational meetings put on by Discover Long Island ensure greater destination awareness with planners as well as allow the sales team to interact in a more direct meaningful and lasting way. These smaller events will take place both on Long Island as hosted FAMs as well as in meeting planner market hubs like Washington DC, New York City, and Boston. They will be strategically aligned with larger trade shows and marketing initiatives occurring in-market for maximum exposure.
MEETINGS & CONVENTIONS SCHEDULE

PCMA
January 6-9, Pittsburg PA

Destinations International Showcase
February 13, Washington DC

Northeast CVB Reception
March, TBD

Meet NY
March 6, New York City

HelmsBriscoe ABC
May 29-31, Houston, TX

MPI World Education Congress
June 15-18, Toronto Canada

ESSAE
June 6, Albany, NY

Northeast CVB Reception
June, Long Island, NY

MPIGNY Golf Outing
July, Long Island, NY

ASAE
August 10-13, Columbus, OH

IMEX
September 10-12, Las Vegas, NV

Small Market Meetings
September 24-26, GreenBay, WI

Northeast CVB Reception
October, TBD
INTERNATIONAL TOUR & TRAVEL

International travel is one of Long Island’s largest opportunities for growth and will remain a central focus in 2019. The Sports Sales and International Travel Trade positions have been combined in 2019 to streamline efficiency and core competencies. The position now oversees Discover Long Island’s travel trade efforts in Long Island’s top overseas markets, the United Kingdom, Germany, Australia and Canada. Having in-market public relations and travel trade representation in the UK and Germany provides tremendous year-round exposure and focuses on critical relationship building that connects international consumers with destination information and sales opportunities. Additionally, a consulting firm led by travel trade experts from Visit California and Visit Florida has been retained to position the organization with overall strategy, success planning and relationship building as we continue to establish our presence in the international travel space.

Discover Long Island funds the majority of these international representation contracts and efforts through REDC grant funding and has applied for and received an additional grant for 2019 that will largely focus on partnering with New York City & Company to capitalize on the 2019 World Pride exposure in June. With millions of overseas visitors anticipated to flock to the region for the major event, Long Island is focused on building a strategy that encourages pre and post NYC trips to our destination. Positioning as the “Official Kick-Off to World Pride”, Discover Long Island is working with the LGBT Network to move Long Island’s Pride on the Beach to the weekend before World Pride and create a weeklong series of events across Long Island for the influx of LGBTQ visitors from across the globe, driving increased traffic to all areas of the Island.
CORE COMPONENTS OF THE INTERNATIONAL STRATEGY

- Enhanced Presence
- Partnerships
- Heightened Focus
- Stakeholder Education and Awareness
ENHANCED PRESENCE

Discover Long Island will continue to have presence at key international trade shows in 2019. The in-house position will allow for greater presence at target shows while the addition of the consulting firm allows for more representation at industry events and provides the built-in expertise to elevate our destination’s profile. Other opportunities to keep our destination top-of-mind year-round include familiarization tours, sales missions, one-on-one meetings and marketing efforts.
PARTNERSHIPS

Tapping into international markets is very lucrative, as international visitors stay twice as long and spend twice as much as domestic travelers, however, reaching these long-haul audiences is expensive. Therefore, leveraging partnerships with New York City & Company, I LOVE NY, Brand USA and ALON Marketing are critical for education and exposure. Long Island has the luxury of connectivity to two of the most recognized brands in the world, I LOVE NY and NYC, who both have in-market and year-round representation in our core international markets, so aligning the brand of Long Island with those iconic partners provides boundless opportunities that would never be achievable for a destination of our size and funding. A significant portion of the 2019 International Tour & Travel budget is allocated to partnerships with these organizations to leverage our dollars against their vast level of existing resources and brand recognition.
HEIGHTENED FOCUS

Specifying targeted international markets allows Discover Long Island to be strategic in our limited resources and to have a more impactful effort in these key international drivers to our destination. Other opportunities for secondary international exposure will be weighed and evaluated based on resources available and return on investment.

STAKEHOLDER EDUCATION AND AWARENESS

Working in the international market space is a nuanced part of the travel industry that requires a deep understanding of specific market needs as well as how to best work with travel trade agencies, wholesalers, receptive operators, and more. The addition of an in-house travel trade position gives the organization a resource to share with local properties, transportation and tour companies, and attractions. This will help to educate and guide how to best tap into desired international markets and make connections and inroads for interested parties. Discover Long Island will continue to promote the businesses who have demonstrated effective ability to work within this market space while working to educate on how to benefit from international travelers with businesses who are new to the space or have yet to consider it.

TOUR & TRAVEL TRADESHOW SCHEDULE

IITA Annual Summit
February, Savannah, Georgia

RTOWest
February, Marina del Rey, California

1TB Berlin
March, Berlin, Germany

RTOEast
April, New York City

IPW (Pow Wow)
June, Anaheim, California

America’s Cup Golf Invitational
December, Michigan
SPORTS DEVELOPMENT

Sports development will play a key role in Long Island's 2019 tourism success with the highly anticipated 2019 PGA Championship taking place at Bethpage Golf Course in May. Having established a solid working relationship with the PGA team planning the championship next year, Discover Long Island will look to maximize that opportunity and continue the momentum that was built by last year's 118th US Open Championship, communicating the extraordinary golf product and experience available on Long Island. The 2019 sports budget allocates funding specific to capitalizing on the world-wide exposure that the PGA Championship brings to our destination. Efforts to continue to lure Olympic sporting opportunities and university sporting facilities will also continue to be a focus. In addition, working with water sports events rights holders and tapping into the emerging sports world of E-Gaming are included in sports development goals for 2019.

Booked Sports Leads in 2018
20

2018 Sports Economic Impact
$5.5 Million

Projected Economic Impact in 2019
$7 Million
CORE COMPONENTS OF SPORTS DEVELOPMENT

A Relationship Building Approach

Thematic Sporting Events

Emerging Trends and Strong Partnerships

Maximizing World-Wide Exposure
A RELATIONSHIP BUILDING APPROACH

The sports department has repositioned the focus to bring greater value to partners by ensuring that targeted events are being sought for the need period times of the year that benefit Long Island's partner facilities. This approach focuses largely on increased lead generation and enhanced outreach and communications that directly connect facilities with rights holders with Discover Long Island serving a facilitation role that assists all parties to achieve success.

EMERGING TRENDS & STRONG PARTNERSHIPS

An emerging trend in the sports world is E-Gaming, which brings together large groups who converge to watch and compete playing digital games. These new and rapidly growing sporting events reinvent the traditional sporting RFP process and provide a unique opportunity for Long Island to be on the forefront of attracting year-round groups into our many venues offering affordable ballroom space within proximity to NYC. Additionally, the establishment of a close relationship with New York City & Company's sports departments allows for the organization to share strategies and receive leads directly from NYC that are a strong fit for Long Island but do not fall within the city's wheelhouse.

THEMATIC SPORTING EVENTS

Long Island features one large asset above many of its competitors, the ocean, sound, bays, and inlets that make it so unique. As such, a larger emphasis will be shown on bringing in water-based sporting events like beach volleyball, surfing, sailing, paddle boarding, open swimming and more to the Island. Events such as the World Surf League and partnering with New York City on the next America's Cup will receive focus.
MAXIMIZING WORLD-WIDE EXPOSURE

The 2019 101st PGA Championship will provide not only incredible occupancy and attendance, but also invaluable television exposure to the targeted and affluent golf traveler. Discover Long Island is working closely with the PGA to maximize not only the in-market opportunities of this event, but also the sponsorship opportunities that provide world-wide media exposure. Other local and regional events, including the Belmont Stakes, The US Open tennis, WWE Wrestlemania 35, Longines, etc., also offer Long Island to lay claim to international sporting events and provide unparalleled marketing exposure for the destination.

Forbes

U.S. Open Draws Huge Crowds; Small Businesses Are Among Winners

Seth Everett Contributor © Forbes
Sports Broadcasting, Pedantry & SAGAFTRA Union Member

The 2018 U.S. Open Championship will be known for no player under par, Phil Mickelson’s double-stroke controversy, and complaints
SPORTS TRADESHOW SCHEDULE

National Association of Sports Commissions
May, Knoxville, TN

National Governing Bodies (NGB's) Reception
June, Colorado Springs, CO

S.P.O.R.T.S
September, Panama City, FL

4S Summit
October, Providence, RI

TEAMS
November, Anaheim, CA

US Sports Congress
December, Columbia, SC

LONG ISLAND SPORTS EVENTS SCHEDULE

101st PGA Championship
May 13-19, $1 million+

NYSPHSAA Swimming & Diving - 3rd Year
March 1-3, $207,484

Tough Mudder - 5th Year
July 20-21, $866,800

USA BMX Gold Cup Championships
October 4-6, $700,000

World Surf League Longboard Championship
September 6-10, $800,000
PARTNER & VISITOR RELATIONS

The engagement and support of stakeholders is instrumental to our success. Several new benefits and strategies have been developed to heighten communication, accessibility, education and awareness of the organization and industry. In addition, the ability to connect Long Island visitors to our partners is the core function of any tourism promotion agency. The recent merger of Partner and Visitor Relations provides the missing link that enhances both the visitor experience and the partner benefit. The department has had strong momentum and looks to continue its growth by enhancing the stakeholder and visitor experience.
CORE COMPONENTS OF PARTNER & VISITOR RELATIONS

- Community Outreach
- Education
- Networking
- Sponsorships
- Recognition
- Visitor Centers
- Retail
COMMUNITY OUTREACH

With the success of our newly implemented partner programing, such as our "Roadshows," that bring the efforts of the organization to Island-wide communities for education and advanced engagement, we plan to continue these events throughout 2019. We understand that it can be difficult for our members to leave their businesses to learn about the programs and opportunities offered by our team, so we will bring the team and the events to their neighborhoods.

EDUCATION

In 2018, we aligned our educational Tourism Symposium with Travel USA’s National Travel & Tourism Week format to better align local and national industry awareness. What started as the Smith Travel Research (STR) Destination Forecast evolved into a full Symposium in 2017 and continues to grow into a full day of tourism education. We choose to cover trending industry topics, such as social media presence, technology advancements, industry panel discussions and much more. With the feedback still being positive, we will continue this event in 2019. We will also be looking to align with other key industry associations to formulate a Visitor Relations education initiative with a Discover Long Island Ambassador Program. This program will be researched and designed throughout 2019 to provide all levels of the tourism industry on Long Island with industry knowledge to cultivate a more enhanced destination experience and will launch in 2020.

NETWORKING

Connecting our partners is a critical function of fostering cross-promotional opportunities. We have turned our smaller quarterly mixers into larger bi-annual networking mixers in 2018 to maximize our partner’s time and experience. These events help to keep industry leaders in communication and provide partners opportunities to highlight the attributes of their business. With such positive feedback from our newly constructed bi-annual format and larger attendance we plan to continue these well received networking events in 2019.

SPONSORSHIPS

Allowing partners to sponsor events at various levels continues to create a culture of participation and engagement. In 2019, the goal is to continue to offer cost-neutral partner relations efforts to provide more industry resources while allowing partners the opportunity to receive the business to business exposure.
RECOGNITION

For the first time in 2017, Discover Long Island was able to highlight and honor tourism industry leaders for their efforts on behalf of Long Island's economy and bring greater awareness of our industry’s impact on the overall business climate. The Inaugural Tourism Awards Gala put a spotlight on leaders and businesses that are making significant and positive impacts that benefit all Long Island residents. With such an overwhelmingly positive response, the event has been added to our annual roster and will continue and grow at the end of 2018 and again at the end of 2019.

VISITOR CENTERS

Ensuring that partner information reaches prospective visitors requires ongoing fulfillment, consumer tracking, inventory and consumer response measurement, and much more behind-the-scenes diligence. It was our focus in 2018 to streamline these services and procedures, and our goal is to continue to evolve our strategies throughout 2019. The opening of the new Long Island Welcome Center in 2017 and the closing of the Valley Stream Visitor Center in 2018 also provided an opportunity to assess all public visitor centers and cultivated a year of transition for those outlets as we assessed design, effectiveness, ROI and industry trends. From this we were able to develop and launch a Mobile Visitor Center to create a new and immersive visitor experience with a responsive way to engage and educate visitors across Long Island. We plan to continue to evolve our mobile presence and interactions throughout 2019 by aligning and participating with key consumer and business events and provide our partners with enhanced opportunities to promote their businesses, events and special offers. In 2019 we are also looking to reinvent our airport visitor services kiosk and experience.

RETAIL

With the growth of Discover Long Island and our brand recognition amongst visitors and locals, we began to research and develop a retail arm to our visitor relations efforts. After a year of sourcing merchandise, platforms, distribution and retailing strategies, we are looking to launch our branded merchandise on a digital platform in 2019.
Our Partner & Visitor Relations department is responsible for ensuring consumers have positive and valuable experiences when interacting with the Discover Long Island brand by sharing key information about Long Island attractions, accommodations, events and more.

Each year, Discover Long Island receives thousands of inquiries requesting the Official Long Island Travel Guide, created by Discover Long Island, and visitor information on the Island. Our team responds to each inquiry individually, ensuring all needs are met.

This year perspective approaches have been implemented to enhance the sense and feel of the visitor experience. 2018 premiered a new immersive calendar to showcase and make experiences more accessible to visitors and locals alike. The new digital technology utilized in the integration of data from our partners into a fully effective and beautifully designed calendar provides a dynamic and fluid user experience with proven technology to increase attendance.

Visitor services houses a vast library of collateral and brochures provided by members and distributes them, along with the Travel Guide, to regional Visitor Centers, information kiosks, libraries, thruway stops and more. Our Travel Guide is the only hard copy collateral available at the new Long Island Welcome Center. Discover Long Island information booths at consumer trade shows are also staffed by the Visitor Services Department.
# PARTNER & VISITOR RELATIONS SHOW SCHEDULE

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Perception Study Reveal Mixer</td>
<td>January 16</td>
</tr>
<tr>
<td>Roadshow Huntington</td>
<td>April</td>
</tr>
<tr>
<td>Tourism Symposium/ NTTW</td>
<td>May</td>
</tr>
<tr>
<td>HIALI Tradeshows</td>
<td>May</td>
</tr>
<tr>
<td>Summer Kickoff Mixer/ PGA Mixer</td>
<td>June</td>
</tr>
<tr>
<td>Mixer</td>
<td>September</td>
</tr>
<tr>
<td>Annual Meeting of Partnership</td>
<td>November</td>
</tr>
<tr>
<td>Tourism Awards Gala</td>
<td>December</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>DL Perceptions Study Unveil</td>
<td>January 16</td>
</tr>
<tr>
<td>Newsday Travel Expo</td>
<td>February 23</td>
</tr>
<tr>
<td>LiLi Maintenance</td>
<td>March 6-14</td>
</tr>
<tr>
<td>Edible Good Spirits Event</td>
<td>March 22</td>
</tr>
<tr>
<td>Downtown Influencer Tour</td>
<td>April 9-11</td>
</tr>
<tr>
<td>PGA Behind the scenes walk through</td>
<td>April 25 – 26</td>
</tr>
<tr>
<td>Long Island Marathon</td>
<td>May 4-5</td>
</tr>
<tr>
<td>National Travel &amp; Tourism Week-Activations</td>
<td>May 6-10</td>
</tr>
<tr>
<td>PGA Final Look</td>
<td>May 13</td>
</tr>
<tr>
<td>PGA Activation</td>
<td>May 17-19</td>
</tr>
<tr>
<td>Bethpage Airshow</td>
<td>May 24-26</td>
</tr>
<tr>
<td>HIALI Tradeshows</td>
<td>May 31</td>
</tr>
<tr>
<td>Macy’s Kick Off</td>
<td>May</td>
</tr>
<tr>
<td>Cradle of Aviation Moon Dinner</td>
<td>June 6</td>
</tr>
<tr>
<td>Belmont Stakes Community Day</td>
<td>June 7</td>
</tr>
<tr>
<td>Belmont Stakes</td>
<td>June 8</td>
</tr>
<tr>
<td>LGBT Pride Week-Activations</td>
<td>June 17-23</td>
</tr>
<tr>
<td>Cradle of Aviation Moonfest</td>
<td>July 20</td>
</tr>
<tr>
<td>Alive After 5</td>
<td>July</td>
</tr>
<tr>
<td>Alive on 25</td>
<td>July</td>
</tr>
<tr>
<td>Alive in the Bay</td>
<td>July Thursday</td>
</tr>
<tr>
<td>Edible Hamptons Food Truck Show</td>
<td>TBD</td>
</tr>
<tr>
<td>Walt Whitman Bicentennial</td>
<td>August 9th – 11th</td>
</tr>
<tr>
<td>Hampton Classic</td>
<td>August 25th TBD</td>
</tr>
<tr>
<td>Association of Paddle Board Surf Professional</td>
<td>August 31st – September 3rd</td>
</tr>
<tr>
<td>World Surf League</td>
<td>September 6-10</td>
</tr>
<tr>
<td>Greenport Maritime Festival</td>
<td>September 21-23</td>
</tr>
<tr>
<td>BMX Regional</td>
<td>October 4-6</td>
</tr>
<tr>
<td>Oyster Festival</td>
<td>October 12-13</td>
</tr>
<tr>
<td>Golden Gathering</td>
<td>October 26</td>
</tr>
<tr>
<td>Suffolk Marathon</td>
<td>October 27</td>
</tr>
<tr>
<td>Islander’s Kickoff</td>
<td>TBD</td>
</tr>
<tr>
<td>LI Nets Opening Day</td>
<td>TBD</td>
</tr>
<tr>
<td>Discover Long Island Annual Meeting</td>
<td>November 16</td>
</tr>
<tr>
<td>Montauk Lighthouse Lighting - TBD</td>
<td>TBD</td>
</tr>
<tr>
<td>Dickens Festival</td>
<td>December 1 – 2</td>
</tr>
<tr>
<td>Discover Long Island Tourism Awards Gala-</td>
<td>December 4</td>
</tr>
<tr>
<td>Patchogue Winter Alive After 5</td>
<td>TBD</td>
</tr>
</tbody>
</table>
SMITH TRAVEL RESEARCH

Since 2016, Discover Long Island has contracted Smith Travel Research each year to create a customized Long Island Forecast Study to help determine Long Island’s market share in comparison to competing destinations, the state of New York as a whole and against national averages. Key findings of this study are presented at the organization’s annual STR Luncheon to organization partners and stakeholders. Topline findings from the 2019 STR Forecast are highlighted below. STR emphasized the need for larger meeting spaces such as a convention center in order to attract the business traveler, which Long Island falls far behind its competitive sets on.

A 2020 STR Forecast Study and corresponding luncheon is scheduled for September 2019.

### Long Island Market Forecast

**If you build it, they will come**

<table>
<thead>
<tr>
<th>Forecast Growth Rates</th>
<th>Actual 2016</th>
<th>Actual 2017</th>
<th>Forecast 2018</th>
<th>Forecast 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supply</td>
<td>1.5%</td>
<td>1.3%</td>
<td>3.9%</td>
<td>3.7%</td>
</tr>
<tr>
<td>Demand</td>
<td>1.6%</td>
<td>-0.3%</td>
<td>4.4%</td>
<td>3.8%</td>
</tr>
<tr>
<td>Occupancy</td>
<td>0.1%</td>
<td>-1.7%</td>
<td>1.7%</td>
<td>0.1%</td>
</tr>
<tr>
<td>ADR</td>
<td>3.9%</td>
<td>1.6%</td>
<td>1.3%</td>
<td>1.5%</td>
</tr>
<tr>
<td>RevPAR</td>
<td>4.0%</td>
<td>-0.1%</td>
<td>3.1%</td>
<td>1.6%</td>
</tr>
</tbody>
</table>

**ReVPAR—Long Island wins the day**

<table>
<thead>
<tr>
<th>Market</th>
<th>Actual 2018</th>
<th>Forecast 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Long Island</td>
<td>$111</td>
<td>$72</td>
</tr>
<tr>
<td>Jersey Shore</td>
<td>$94</td>
<td>$83</td>
</tr>
<tr>
<td>Cape Cod</td>
<td>$87</td>
<td></td>
</tr>
<tr>
<td>Annapolis, MD</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Galveston, TX</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Occupancy—Long Island is leading the pack**

<table>
<thead>
<tr>
<th>Market</th>
<th>Actual 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Long Island</td>
<td>72.2%</td>
</tr>
<tr>
<td>Jersey Shore</td>
<td>60.3%</td>
</tr>
<tr>
<td>Cape Cod</td>
<td>56.3%</td>
</tr>
<tr>
<td>Annapolis, MD</td>
<td>65.2%</td>
</tr>
<tr>
<td>Galveston, TX</td>
<td>67.0%</td>
</tr>
</tbody>
</table>

**Day of Week Occupancy: Leisure travel is dominant**

<table>
<thead>
<tr>
<th>Day of Week</th>
<th>Long Island</th>
<th>Jersey Shore</th>
<th>Cape Cod</th>
<th>Annapolis, MD</th>
<th>Galveston, TX</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sunday</td>
<td>59.3%</td>
<td>69.4%</td>
<td>76.7%</td>
<td>76.7%</td>
<td>83.6%</td>
</tr>
<tr>
<td>Monday</td>
<td>69.4%</td>
<td>69.4%</td>
<td>76.7%</td>
<td>76.7%</td>
<td>83.6%</td>
</tr>
<tr>
<td>Tuesday</td>
<td>76.7%</td>
<td>76.7%</td>
<td>76.7%</td>
<td>76.7%</td>
<td>83.6%</td>
</tr>
<tr>
<td>Wednesday</td>
<td>76.7%</td>
<td>76.7%</td>
<td>76.7%</td>
<td>76.7%</td>
<td>83.6%</td>
</tr>
<tr>
<td>Thursday</td>
<td>70.0%</td>
<td>70.0%</td>
<td>70.0%</td>
<td>70.0%</td>
<td>83.6%</td>
</tr>
<tr>
<td>Friday</td>
<td>76.1%</td>
<td>76.1%</td>
<td>76.1%</td>
<td>76.1%</td>
<td>83.6%</td>
</tr>
<tr>
<td>Saturday</td>
<td>83.6%</td>
<td>83.6%</td>
<td>83.6%</td>
<td>83.6%</td>
<td>83.6%</td>
</tr>
</tbody>
</table>

© 2018 STR. All Rights Reserved.
The Long Island Destination Perception Study, conducted and led by one of the nation's top research institutes, Longwoods International, was commissioned in partnership with Discover Long Island, the Manufacturing Consortium of Long Island (MCLI), National Grid, HIA-LA Long Island University and the Long Island MacArthur Airport to learn the challenges and opportunities for the region's image and attributes that directly and indirectly impact economic development and growth. Key findings revealed strong name recognition for the destination overall, but little-known knowledge of its attributes, including that Long Island is home to famed beaches, the Gold Coast The Hamptons, vineyards and the region's historic significance. Most respondents did not recognize Long Island as having much open and outdoor space and instead perceived it to be more urban, smoggy and congested. In addition, the study showed that once readers learned of the types of tourism product and activities available on Long Island, the perception and intent to visit or consider relocation sharply increased.
Long Island’s Image vs. Competition

- When we look at Long Island’s image versus that of the combined competition, Long Island’s top strengths seem to be highly correlated to its proximity to New York City
  - Good public transit
  - Proximity/easy access to other places
  - Big city amenities like nightlife, entertainment, dining, arts/culture, shopping
  - Multicultural/diverse atmosphere
- People also give Long Island the advantage for:
  - Diversified economy
  - Upscale
  - Excitement

Long Island enjoys universal name recognition.

- Although trailing major tourist destinations San Diego and Charleston in terms of overall image, Long Island edges out regional competitors Westchester, Hartford and Trenton:
  - The latter advantage is most likely related to Long Island’s tourism assets and/or the borrowed interest of being closest to NYC
- Long Island has an edge over the broad combined competition for good public transit; proximity/easy access to other places; big city amenities like nightlife, entertainment, dining, arts/culture, shopping; multicultural/diverse atmosphere; diversified economy; upscale and exciting atmosphere

Long Island’s Weaknesses

- Despite 100% name recognition, Long Island is not often on people’s minds on a spontaneous basis, with very few naming Long Island among the top 5 places in the Northeast in which they would enjoy living
- And depth of knowledge seems to be limited too – with just 3 in 10 (29%) indicating they “know a lot” about the place, and most saying they either know only “a little” about Long Island (53%) or “the name only” (18%).
- Long Island falls well behind the competition leaders on the key image hot buttons that motivate choice of a place to live or vacation destinations, including:
  - The vibrancy of uniqueness, a great future, etc.
  - The key aspects of livability
NEW YORK STATE TOURISM IMPACT REPORT

The 2017 New York State Economic Impact of Tourism report, an annual study conducted by Tourism Economics, a division of Oxford Economics, showed Long Island's visitor economy expanded with 4.0% growth in traveler spending, reaching a new high of $5.9 billion in economic impact from this critical industry for the region. Long Island was ranked second in traveler spending, after New York City, among 11 state regions. New York City, Long Island and Hudson Valley together comprise nearly 80% of New York State traveler spend. These findings showcase that the Long Island tourism economy is the strongest it has been in 16 years.

Tourism in Long Island generated **$725 million** in state and local taxes in 2017. Sales, property, and hotel bed taxes contributed to nearly **$400 million** in local taxes.

Suffolk County produced 54.6% of the region's tourism tax base.
New York City, Long Island and Hudson Valley together comprise nearly 80% of New York State traveler spend.
Tourism in Long Island is a $5.9 billion industry, supporting 81,707 jobs. Suffolk County accounts for 54% of traveler spending in Long Island. Traveler spending in the region increased by 4.0% in 2017.

<table>
<thead>
<tr>
<th>Total Tourism Impact, 2017</th>
<th>Traveler Spend '000</th>
<th>Labor Income, '000</th>
<th>Employment</th>
<th>Local Taxes '000</th>
<th>State Taxes '000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nassau</td>
<td>$2,696,657</td>
<td>$1,481,117</td>
<td>38,048</td>
<td>$179,409</td>
<td>$148,301</td>
</tr>
<tr>
<td>Suffolk</td>
<td>$3,173,889</td>
<td>$1,685,657</td>
<td>43,659</td>
<td>$219,519</td>
<td>$174,546</td>
</tr>
<tr>
<td>TOTAL</td>
<td>$5,870,546</td>
<td>$3,166,774</td>
<td>81,707</td>
<td>$398,928</td>
<td>$322,847</td>
</tr>
</tbody>
</table>
Travelers spent **$5.9 billion** in Long Island in 2017. Spending at restaurants and on transportation comprised **30%** and **23%** of the total, respectively.

### 2017 Traveler Spend '000s

<table>
<thead>
<tr>
<th></th>
<th>Lodging</th>
<th>Recreation</th>
<th>F&amp;B</th>
<th>Retail &amp; Svc Stations</th>
<th>Transport</th>
<th>Second Homes</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nassau</td>
<td>$362,414</td>
<td>$297,229</td>
<td>$977,096</td>
<td>$476,022</td>
<td>$557,470</td>
<td>$26,426</td>
<td>$2,696,657</td>
</tr>
<tr>
<td>Suffolk</td>
<td>$522,235</td>
<td>$206,104</td>
<td>$791,201</td>
<td>$461,672</td>
<td>$803,021</td>
<td>$389,656</td>
<td>$3,173,889</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>$884,650</strong></td>
<td><strong>$503,333</strong></td>
<td><strong>$1,768,297</strong></td>
<td><strong>$937,693</strong></td>
<td><strong>$1,360,491</strong></td>
<td><strong>$416,081</strong></td>
<td><strong>$5,870,546</strong></td>
</tr>
</tbody>
</table>