



Tourism Economic Development Report

An official publication of the Greater Raleigh Convention and Visitors Bureau

visitRaleigh.com

DECEMBER 2008

WAKE COUNTY CAPSULE

For the first 10 months of calendar year 2008 Wake County **hotel occupancy tax collections were up 2.1 percent** and **prepared food and beverage tax collections were up 7.7 percent** over 2007.

GROUP SALES

Sales Manager Stephen Jackson traveled to Rejuvenate Conference, a first time trade show for the GRCVB group sales. Partnering with the Marriott City Center, the team returned with seventeen qualified leads, totaling over 50,000 room nights. This show will certainly be on our circuit again next year! Working with Marketing and Communications, we completed our Hotel/GRCVB 101 meetings. After hosting six events in all, we met with representatives from almost half of the Wake County hotels, showing them how we can work together to benefit both parties. The meetings were well received, and much was learned by both GRCVB and partners. A major client event was hosted in Washington D.C. by GRCVB National Sales Managers Kumi Anzalone and Stephen Jackson November 20th. Partnering with our area hotels and RCC, the group enjoyed a private tent for refreshments prior to attending the Cirque de Soleil show "Kooza". We have already received RFP's from the attendees.

SPORTS MARKETING

November was a huge month for soccer in Greater Raleigh. The CASL **visitRaleigh.com National Soccer Series** got underway, and before it was over, more than 1,100 youth soccer teams from throughout the U.S. would visit Wake County, generating more than 35,000 hotel room nights and \$8.5 million in direct visitor spending. ... In addition, WakeMed Soccer Park in Cary hosted the **ACC Women's Soccer Championship** and the **ACC Men's Soccer Championship** on consecutive weekends, and NC State hosted four **N.C. High School Athletic Association State Soccer Championship games** on its campus. Other key sporting events in November included the **NCHSAA Volleyball Championships** at Reynolds Coliseum; the **NCHSAA Cheerleading Championships** at the Raleigh Convention Center; **The National Bowling Association Eastern Regionals** at area AMF lanes; and the **Nike Cross Nationals Southeast Regionals** (cross country), featuring 450 runners, at WakeMed Soccer Park. Tori Collins attended the **United States Specialty Sports Association (USSSA) national convention**, where she met with event owners and rights-holders and marketed Greater Raleigh as a destination for future baseball and softball tournaments. The GRCVB worked with its partners to record a couple of major softball bookings – the **2009 USSSA Church World Men's & Women's Tournament** at Middle Creek Park in Cary, and the **2010 ASA 18-U Southern Nationals Girls Fast-Pitch Class A Championship** at Walnut Creek Softball Complex in Raleigh. Jason Philbeck was a guest panelist at a Parks, Recreation and Tourism class at N.C. State University on Nov. 24.

PUBLIC RELATIONS

Travel, lifestyle and food journalists on assignment for publications including *N.C. Signature Magazine* and *AAA Home and Away*, as well as freelance journalist Normand Cazalais, visited the area in the past month. Thank you to the Raleigh Marriott Crabtree Valley, Urban Food Group, the Umstead Hotel and Spa, Herons Restaurant and the Pit for hosting these writers. Recent coverage for the destination includes: Atlanta's *Sunday Paper*, *N.C. Magazine*, *Successful Meetings*, *Black Meetings and Tourism*, *Diversion*, *Convene*, *Bon Appetite* and *NWA World Traveler*, to name a few.



SERVICES

Our last large convention group for the calendar year (housed in the RCC) went out the door as AASHE ended in early November (Association for the Advancement of Sustainability in Higher Education). The group well exceeded its original attendance projections, and we are still working to analyze the final numbers (estimated at over 1000). The convention center, host hotels and overflow hotels all did an excellent job of meeting the unique demands of the group. Beyond exceeding projected numbers, the group had very high “green” standards and the successful hosting of the convention will go a long way in further establishing Greater Raleigh and the Raleigh Convention Center as a green meetings location. We had some other great successes during the month: jointly with Sports and IT we launched our online post event survey evaluation process. This method allows us to offer planners a quick online tool for providing important feedback from the meetings, conventions and sports events we’ve hosted. We’re seeing results starting to come in now for fall meetings, and now that the process is in place, survey results should be seen very quickly after an event comes and goes. We completed our participation in the Fall Intern Program for NCSU’s Park, Recreation and Tourism program. Our two interns successfully completed a restaurant referral book for the VIC and conducted an audit of convention and group service providers for the important Event Services Listing in the CS section of visitRaleigh.com. Julie completed an advanced level interview for a rising PRT graduate student as well. We closed the month by hosting a “Customer Care Carolina Style” class at the Marriott Raleigh City Center Hotel with 25 attendees. We will soon set four new training dates for the new year. The full Community Hospitality Partnership also convened so that we could revisit the progress we’ve made and set new goals for the three partnership subcommittees (customer service training, destination education and job placement - as we move into 2009 each subcommittee will set strategies for three target initiatives for each group). In the way of Ambassador news, our volunteer staff worked over 110 hours for spots events, conventions and in the Visitor Information Center (what would we do without them?). Finally, VIC visitation has dropped off slightly with 477 visitors for the month, but overall production for the VIC and visitor inquiries is strong. Year to date we’re at 6,089 calls, 4,855 VIC visitors, 946 email inquires, and 83 school requests.

MARKETING

In November, the Marketing Department launched a Greater Raleigh holiday microsite and accompanying sweepstakes promotion (<http://www.visitRaleigh.com/holidays/>). This month, a related holiday marketing message is being distributed to the Bureau’s email database of 43,000 visitors to drive Web traffic and encourage winter visits to Greater Raleigh. Under the 2008-09 destination media plan, GRCVB ran local ads aimed at the visiting friends and relatives market in *The N&O* (11/27-28), a leisure ad in *AAA Go* magazine, and meetings-related ads in *Experient Meeting Mentor*, *Meetings South*, *Successful Meetings*, and *Successful Meetings South*. Partner information forms were mailed to all Wake County hotels, restaurants, and attractions in preparation for Visit Raleigh, the Official Visitors Guide, 2009 edition. GRCVB’s partner in publishing the Visitors Guide, S&A Cherokee, is filling what few spaces remain and will close ad sales on January 21 (find out more and reserve space now at: http://www.visitRaleigh.com/partners/partnership_opportunities). Also, GRCVB is collecting updates from major meeting hotels and Wake County meeting facilities in preparation for the 2009 Official Meeting Planners Guide, which will be distributed to nearly 1,000 meeting professionals in the coming year. Under leisure and tourism marketing, GRCVB conducted a number of focused groups in November to explore a new sales incentive to be marketed in conjunction with ZSpotlight.com and Wake County lodging properties. The Bureau is enlisting the support of local partners in December and will debut the new SmartCard program with visitors in January. The SmartCard program is designed to motivate new and return visits, increase visitor circulation within the local hospitality sector, and increase sales amid our current economic conditions.



**VISITOR INDUSTRY STATISTICAL REPORT
NOVEMBER 2008
HOTEL OCCUPANCY PRODUCTION**

	Chg from Oct 07	Wake County	North Carolina	United States
Oct 2008 Occupancy %	-9.1%	66.0%	60.7%	62.1%
Oct 2008 ADR	+2.3%	\$89.01	\$89.72	\$107.62
Oct 2008 RevPAR	-7.0%	\$58.71	\$54.45	\$66.84
Oct 2008 Rooms Sold/% Change	-21,522	-7.2%	-6.5%	-3.7%
Oct 2008 Rooms Avail/% Change	+6,803	+2.1%	+2.6%	+3.0%
2008 YTD Occupancy %	-4.8%	63.8%	58.6%	62.8%
2008 YTD ADR	+5.5%	\$88.05	\$85.26	\$107.44
2008 YTD RevPAR	+0.4%	\$56.18	\$49.97	\$67.51
2008 YTD Rooms Sold/% Change	-73,382	-2.7%	-4.5%	-0.9%
2008 YTD Rooms Avail/% Change	+56,937	+2.2%	+1.7%	+2.5%

Source: Smith Travel Research, Inc.-Stats lag by one month; Republication or other re-use of this data without the express written permission of STR is strictly prohibited.

AVIATION PRODUCTION

Source: Raleigh-Durham International Airport-Stats lag by one month

	October 2008	2008 YTD	YTD% Chg from 2007
Passenger Enplanements	410,663	4,106,508	-2.0%
Passenger Deplanements	410,695	4,109,066	-6.0%

RALEIGH CONVENTION CENTER INFORMATION

Activity by Year	2008	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total
HVS		9	19	28	33	37	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	
At RCC (Definite)	14	34	24	16	10	9	6	4	2	3	1	1		1	1		126
At RCC (Tentative)	1	12	13	27	14	9	34	2	-	-	-	-	-	-	-	-	82

Above numbers are GRCVB assisted definite and tentative bookings for the RCC

GROUP SALES DEFINITE ROOM NIGHT PRODUCTION

	November 2008	YTD	08/09 YTD Goal	Fiscal YTD +/- Variance
Total Room Nights	6479	60,506	49,872	+18%
Estimated Economic Impact	\$3,403,983	\$42,405,300	\$25,000,002	+96%
Number of Definite Bookings	11	98	156	-41%

FY runs June 08-June 09

GROUP SALES TENTATIVE ROOM NIGHT PRODUCTION

	November 2008	YTD	08/09 YTD Goal	Fiscal YTD +/- Variance
Total Room Nights	38,534	126,080	157,500	-24%
Estimated Economic Impact	19,024,194	64,718,454	\$107,502,000	-33%
Number of Tentative Leads	42	150	240	-40%

FY runs June 08-May 09



SPORTS MARKETING ASSISTED DEFINITE ROOM NIGHT PRODUCTION

	November 2008	YTD	08/09 YTD Goal	Fiscal YTD +/- Variance
Total Room Nights	5,250	56,351	38,327	+47%
Estimated Econ Impact	\$1,020,775	\$13,145,649	\$12,498,000	+5%
Number of Definite Bookings	7	24	27	- 11%

VISITOR SERVICES PRODUCTION

	November 2008	FY 08/09 YTD	YTD% Chg from 07/08
Number of Groups Served	35	209	+28.0 %

CONVENTION CENTER DEFINITE BOOKINGS

Group Name	Meeting Dates	Total Room Nights	Total Attendance	Est. Econ. Impact
Black Data Processing Associates	8/2 - 9/09	1,921	600	\$566,601
National Agents Alliance	1/29 – 2/2/09	1,790	3,000	\$1,489,890
TOTAL (A)		3,711	3,600	\$2,056,491

GROUP SALES/SPORTS MARKETING ASSISTED DEFINITE BOOKINGS

Group Name	Meeting Dates	Total Room Nights	Total Attendance	Est. Econ. Impact
2009 Krispy Kreme Challenge	2/6-7/09	1,200	1,500	\$203,300
Cary Duathlon Series	3/21-22/09	400	500	\$77,850
Triangle Orthopaedic Triathlon	4/18-19/09	650	1,200	\$135,850
Town of Garner 5K	5/9-10/09	200	600	\$56,800
BASF Smile Train Triathlon	6/27-28/09	400	600	\$74,600
2009 USSSA Church Softball World	8/28-30/09	750	960	\$153,525
2010 ASA Southern Natl's Girls Fast	7/27-8/1/10	1,650	1,750	\$291,850
SPORTS TOTALS (B)		5,250	7,110	\$1,020,775
Blue Star Services	9/10 - 11/08	10	175	\$21,615
Event Management Services	2/6 - 9/09	462	400	\$263,502
Winter Guard International	2/13 - 15/09	200	1,000	\$256,800
Nurse Builders	2/26 - 27/09	10	30	\$5,235
Society for Intercultural Education, Training and Research	3/4 - 07/09	475	350	\$226,725
North Carolina Division on Career Development and Transition	4/29 – 5/1/09	530	400	\$154,020
United States Junior Chamber	2/8 - 14/10	360	300	\$221,454
Delta Tau Delta	2/19 - 20/10	191	67	\$44,121
North Carolina Division on Career Development and Transition	4/28 - 30/10	530	400	\$154,020
TOTAL GROUP (C)		2,768	3,122	\$1,347,492
GRAND TOTAL (A+B+C)		\$11,729	\$13,832	\$4,424,758



BIDS SUBMITTED FOR GROUP SALES/SPORTS MARKETING

Group Name	Dates	Total Room Nights	Attendance	Estimated Economic Impact
SPORTS MARKETING				
2009 NCAA DII Baseball Champ.	5/22-29/09	TBD	TBD	TBD
2010 NCAA DI Women's Lacrosse	5/28-30/10	TBD	TBD	TBD
2011 NCAA DI Women's Lacrosse	5/27-29/11	TBD	TBD	TBD
2011 NCAA Men's College Cup	December 2011	1,400	8,500	\$330,000
2009-10 Senior Softball USA East. Nat.	August 2009 & 2010	1,800	1,300	\$335,700
2010 ASA South. Natl's Girls Fastpitch	7/27-8/1/10	1,650	1,750	\$291,850
GROUP SALES				
MarCom Managers Meeting	1/19-22/09	180	35	\$44,505
Raleigh American Cribbage	3/13-15/09	50	80	\$24,420
Vacation Rentals	3/24-26/09	280	315	\$165,300
Environmental Council of States	4/19-24/09	720	220	\$166,320
IBM/lenovo	5/1-5/6/09	760	1,000	\$614,310
NC Society of Accountants	11/1-3/09	24	65	\$17,946
NC Affordable Housing Conference	11/3-11/4/09	160	700	\$103,650
NC Society for Clinical Laboratory	3/23-3/26/10	299	325	\$139,269
NC Pupil Transportation	7/18-7/22/10	1,400	600	\$417,000
The Body Shop at home	8/8-8/15/10	1,325	1,200	\$948,990
NC Community Collge Systems	10/8-10/12/10	2,100	3,500	\$1,655,100
NC healthcare Information Systems	5/2-5/6/11	335	300	\$147,585
UNC Chapel Hill School of Government	2/15-2/17/12	355	450	\$146,355
Carolinas Roofing & Sheet Metal Contractors	1/21-1/24/13	360	600	\$232,335
Carolinas Roofing & Sheet Metal Contractors	1/20-1/23/14	360	600	\$232,335
GRAND TOTAL		13,355	21,540	\$6,012,970

SITE VISITS

Group Name	Total Room Nights	Total Attendance
SPORTS MARKETING		
USA Volleyball (Raleigh Convention Center)	TBD	TBD
GROUP SALES		
Association of Christian Schools (6 years definite)	1,542	3,500
Auto Launch	90	50
CAI	210	450
NC Affordable Housing Conference	160	700
TOTAL	2,002	4,700



TRADESHOW & EVENTS

Event Name	Location (Dates)
SPORTS MARKETING	
Sony Ericsson City of Oaks Marathon	Raleigh (November 2)
ACC Women's Soccer Championship	Cary (November 5-9)
NCHSAA Cheerleading Championship	Raleigh (November 8)
CASL visitRaleigh.com National Soccer Series	Wake County (November 8-Dec. 7)
ACC Men's Soccer Championship	Cary (November 11-16)
USSSA National Convention	Orlando (November 18-21)
Greater Raleigh Sports Council Planning Committee Mtg.	Raleigh (November 19)
Nike Cross Nationals Southeast Regional	Cary (November 29)
GROUP SALES	
PCMA Annual Service N Sync Day	Ft Belvoir, VA (November 5)
PMPI Professional Development Event	Silver Spring, MD (November 6)
Rejuvenate 2008	Virginia Beach (November 10-13)
NC SGMP Chapter and Board Meeting	Chapel Hill, NC (November 12)
PCMA Capital Chapter Annual Meeting	Washington DC (November 12)
AENC Speakers Showcase	Raleigh, NC (November 12)
GRCVB Hotel 101	RDU, Crabtree (November 13)
GRCVB Hotel 101	Cary & Apex (November 17)
AMP's Monthly Event	Washington DC (November 18)
Sales Calls and Client DC Event	Washington DC (November 19)
Sales Calls and Client DC Event	Washington, DC (November 19-20)
GRCVB Hotel 101	North Raleigh (November 20)
MPI-Carolina's Chapter Meeting	Raleigh, NC (November 20 & 21)
AENC Board Meeting	Raleigh NC