

TOURISM ECONOMIC DEVELOPMENT REPORT

An official publication of the Greater Raleigh Convention and Visitors Bureau

VisitRaleigh.com

MAY 2008

WAKE COUNTY CAPSULE

For the first three months of calendar year 2008 Wake County **hotel occupancy tax collections were up 3.3 percent** and **prepared food and beverage tax collections were up 6.8 percent** over 2007.

GROUP SALES

Congratulations to our National Sales Manager, Loretta Yingling, and Associate Director of Sales, Malinda Pettaway, for their Meeting Professionals International-Carolina's Chapter Tomorrow's Leadership Award nominations. Malinda has also been nominated by Association Executives of NC for the Patsy B. Smith Award. Our team is making a positive difference in the hospitality community, and being recognized for it!

Members of our sales team attended HSMAI's Affordable Meetings Chicago Tradeshow, GA-MPI MEC Atlanta Tradeshow, Springtime in the Park, D.C. area, and AENC in Greensboro, NC. New contacts and leads were gleaned from all shows. Our team took first place in booth presentation at the AENC show. Award winners, we are!

A two year contract (2009-2010) for the American Trucking Association has been finalized with the RCC and downtown hotels. The National Agents Alliance will be the first conference to be held in the new RCC, with 2,500 attendees in September 2008. They have asked for contracts for their January 2009 conference dates, as well. Black Data Processing Associates has chosen Raleigh and the RCC for their home in August 2009, and are also looking at us for future years, as well.

SPORTS MARKETING

The GRCVB helped host three national amateur sporting events in Wake County during the third weekend of April. They included the Deep South Classic, which featured 248 girls all-star basketball teams from throughout the U.S.; the United States Tennis Association's National Campus Championships, which brought together the top 64 collegiate club teams in the nation; and the Collegiate Club Softball National Championship, which featured America's 16 best college club teams vying for a national title. All three events were tremendous successes and combined to generate more than 7,500 hotel room nights in the marketplace.

Members of the GRCVB sports marketing staff attended the National Association of Sports Commissions' annual meeting in Omaha, Neb. There, they represented Raleigh and Wake County in one-on-one meetings with event owners and rights-holders from around the nation.

GRCVB and the Town of Cary have partnered to bring the Nike Team Cross Country Southeast Regionals to WakeMed Soccer Park beginning in 2008. The event, which is set for Nov. 29 this year, will bring more than 500 of the top high school runners from throughout the Southeast to Cary, where they will compete for a spot in the Nike Nationals the following weekend in Portland, Ore.

Preparations continue for one of the largest youth sporting events ever hosted in the Triangle. The 2008 U.S. Youth Soccer Southern Regionals are set for June 19-25. Games will be played at the WRAL Soccer Center in Raleigh and the Burt Gillette Athletic Complex in Wilson. The tournament, which will include 184 teams from 12 Southern states, is expected to create almost 20,000 hotel room nights and more than \$4.2 million in direct visitor

spending. The Capital Area Soccer League, the City of Wilson, the N.C. Youth Soccer Association and GRCVB are the primary hosts.

PUBLIC RELATIONS

GRCVB Director of Communications, Ryan Smith partnered with Richard Brooks of The Umstead Hotel & Spa for tea with travel and lifestyle media based out of Washington, DC. The event, coordinated by the N.C. Division of Tourism, drew more than 10 media outlets to the Ritz Carlton Hotel for a traditional southern tea. Outlets attending the afternoon event included *Family Travel Network*, *National Geographic Traveler*, *USA Today*, the *Washington Post* and the *Washingtonian*. The area's \$3 billion in development and the Dead Sea Scrolls at the N.C. Museum of Natural Sciences, as well as special events and packages created to compliment the blockbuster exhibit were pitched to the media. While in Washington, DC, Loren Gold and Ryan Smith met with editors from USAE and ASAE meeting publications to discuss Raleigh as a premier meeting and convention destination.

SERVICES

Convention and Visitor Services celebrated GRCVB's first full month in the new Visitor Information Center in April. Spring has brought with it many special events, and that means more visitors in the area and in the VIC. In April we serviced 467 total walk in visitors, with a year to date of 693. We had a record high single day visitation of 95 on Saturday, April 26. This particular Saturday was spectacular for Wake County visitors overall, with many special events occurring all around the county. Downtown was notably busy with the World Beer Festival at sold out attendance for both sessions (with over 8,000 attendees) and the Armed Forces Parade bringing hundreds out for the wonderful parade and related festivities.

Our Raleigh Ambassador Program was active during April, with the volunteers working 66.5 hours in the VIC (worked by multiple Ambassadors) and 36.5 hours for sports events (6 Ambassadors worked the US Tennis Association events and also for National Clubs Softball).

On the convention and group side, we're continuing to build our processes and will have news soon on housing bureau services and our group arrival communication plan. We're working hard to gear up for strong summer and fall arrivals!

VISITOR INDUSTRY STATISTICAL REPORT APRIL 2008 HOTEL OCCUPANCY PRODUCTION

	Chg from Mar 07	Wake County	North Carolina	United States
Mar 2008 Occupancy %	-4.2%	65.9%	59.4%	62.6%
Mar 2008 ADR	+6.2%	\$88.57	\$81.40	\$109.36
Mar 2008 RevPAR	+1.7%	\$58.35	\$48.35	\$68.50
Mar 2008 Rooms Sold/% Change	-8,530	-3.1%	-4.8%	-2.4%
Mar 2008 Rooms Avail/% Change	+3,163	+1.2%	+1.6%	+2.3%
2008 YTD Occupancy %	-2.6%	60.8%	53.8%	57.8%
2008 YTD ADR	+6.7%	\$88.05	\$79.65	\$107.63
2008 YTD RevPAR	+3.9%	\$53.52	\$42.82	\$62.37
2008 YTD Rooms Sold/% Change	-11,721	-1.6%	-2.1%	-0.6%
2008 YTD Rooms Avail/% Change	+6,424	+0.9%	+1.4%	+2.1%

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

	April 2008	2008 YTD	YTD% Chg from 2007
Passenger Enplanements	431,103	1,132,204	4.2
Passenger Deplanements	427,629	1,136,423	3.5

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

GROUP SALES DEFINITE ROOM NIGHT PRODUCTION

	April 2008	YTD	07/08 YTD Goal	Fiscal YTD +/- Variance
Total Room Nights	7,177	88,031	87,076	+2%
Estimated Econ Impact	\$4,580,484	\$49,610,082	\$44,000,000	+11%
Number of Definite Bookings	16	172	275	-35%

FY runs June 07-May 08

GROUP SALES TENTATIVE ROOM NIGHT PRODUCTION

	April 2008	YTD	07/08 YTD Goal	Fiscal YTD +/- Variance
Total Room Nights	20,561	299,616	275,000	+9%
Estimated Econ Impact	\$7,986,747	\$179,988,450	\$123,750,000	+45%
Number of Tent. Leads	30	416	440	-5%

FY runs June 07-May 08

SPORTS MARKETING ASSISTED DEFINITE ROOM NIGHT PRODUCTION

	April 2008	YTD	07/08 YTD Goal	Fiscal YTD +/- Variance
Total Room Nights	1,731	70,493	73,330	- 3.8%
Estimated Econ Impact	\$373,815	\$21,134,568	\$23,749,050	- 11%
Number of Definite Bookings	4	60	60	-----

INDIVIDUAL TRAVEL/DESTINATION MARKETING PRODUCTION

	April 2008	FY 07/08 YTD
Total Visitor Inquiries (incl. advertising) *Excludes VisitRaleigh.com Inquiries	1,175	199,973

VISITOR SERVICES PRODUCTION

	April 2008	FY 07/08 YTD	YTD% Chg from 06/07
Number of Groups Served	101	341	-25%

CONVENTION CENTER DEFINITE BOOKINGS

Group Name	Meeting Dates	Total Room Nights	Total Attendance	Est. Econ. Impact
National Agents Alliance	9/11-15/08	1,790	2,500	\$1,255,890
On Course National Conference	5/7-9/09	750	450	\$220,050
American Trucking Association	9/11-17/09	2,566	700	\$592,746
American Trucking Association	9/17-23/10	2,466	700	\$569,646
TOTAL (A)		7,572	4,350	\$2,638,332

Activity by Year	2008	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total
At RCC (Definite)	40	55	22	12	10	9	5	3	1	2	1	1	1	-	1	-	163
At RCC (Tentative)	26	52	29	24	14	9	2	1	-	-	-	-	-	-	-	-	157

GROUP SALES/SPORTS MARKETING ASSISTED DEFINITE BOOKINGS

Group Name	Meeting Dates	Total Room Nights	Total Attendance	Est. Econ. Impact
2008 Canadian Olympic Baseball team	7/31-8/5/08	140	50	\$45,210
2008 U.S. Olympic Baseball team	7/31-8/5/08	246	100	\$98,244
2008 USTA Bullfrog Southern Designated	10/3-6/08	1,045	742	\$230,655
2008 Nike SE Team Cross Country	11/27-30/08	300	500	\$97,950
SPORTS TOTALS (B)		1,731	1,392	\$373,815
Cooperative Baptist Fellowship of North Carolina	4/11-12/08	350	1,000	\$268,050
Ashland Construction Company	4/18-18/08	12	36	\$2,772
Bhagat Wedding	5/30- 1/08	20	10	\$4,620
VA/Dod LBP	5/19-21/08	75	25	\$17,325
North Carolina Department of Agriculture	6/5-8/08	600	2,400	\$1,191,600
Go Atlantis	6/5/08	35	40	\$8,085
Independent Garage Owners of NC, Inc.	9/24-27/09	150	200	\$80,280
International Public Management Association for Human Resources-NC Chapter	9/13-15/09	200	140	\$56,730
JT Dunn Enterprises	10/6-9/08	63	150	\$55,620
Spaulding Family Reunion	7/30-1/10	410	400	\$211,710
Blue Star Services	9/10-12/10	65	75	\$30,810
TOTAL GROUP (C)		1,980	4,476	\$1927602
GRAND TOTAL (A+B+C)		11,283	126,252	\$675,078,876

BIDS SUBMITTED FOR GROUP SALES/SPORTS MARKETING

Group Name	Dates	Total Room Nights	Attendance	Estimated Economic Impact
AKC Breeders Symposium	5/01/08	20	100	\$26,680
Labo Agro II	10/25/08	70	70	\$23,190
Labo Agro I	10/27/08	140	70	\$46,380
2008 Association of Independent Mailing	11/2/08	125	100	\$42,915
2008 ACC Men's & Women's Soccer	11/05-16/08	1,400	5,000	\$284,000
Diocese of Raleigh Catholic Schools	11/9/08	700	1200	\$325,800
2008 Nike Team Cross Country Southeast Regional	11/28-29/08	300	500	\$97,950
NC News Network	12/01/08	105	40	\$26,101
UNC SILS	2/01/09	500	300	\$185,700
NC Association of Marriage and Family Therapy	2/01/09	137	275	\$101,847
Safe Schools and Character Education Conference	2/25/09	806	1000	\$318,396
2009 Society of Intercultural Education	3/2/09	475	350	\$226,725
2009 Black Elected Officials	4/22/09	167	100	\$43,842
2009 Connectional Council	7/19/09	2,010	500	\$754,855
2011 Agricultural Media Summit	7/19/09	1,290	450	\$327,240
IIR- IBC BioProcess International Conference	10/1/09	1,715	750	\$589,215
2010 Soaring Society of America	1/25/10	842	325	\$229,602
2010 Delta Sigma Pi	2/18/10	275	75	\$81,912
Association of Self Advocates of NC	3/01/10	595	700	\$281,355
2010 International Optical Design Conference	6/11/10	696	150	\$324,576
Southeast Region Wound, Ostomy and Continence Nurses	9/01/10	490	250	\$148,290
2009 National Conference for Minority Lawyers	7/22/11	179	100	\$45,795
North American Assn for Environmental Education	10/1/11	3,465	1200	\$870,615
2013 Athletic Equipment Managers	6/2/13	1,320	360	\$386,820
GRAND TOTAL		17,822	13,965	\$5,789,801

SITE VISITS

Group Name	Total Room Nights	Total Attendance
2008 U.S. Youth Soccer Southern Regionals	20,000	9,500
2008 USA Baseball Olympic Team	246	100
BDPA	1,921	600
International Association for Identification(2013)	5,080	1,200
National Collegiate Conference	125	350
NC Fireman's Association (2009 and 2010)	3,320	4,000
NC League of Municipalities (2011)	1,750	2,500
NC News Network	105	40
TOTAL		

TRADESHOW & EVENTS

Event Name	Location (Dates)
NCAA Basketball LOC Wrap-Up Meeting	Raleigh (April 1)
Springtime in the Park Tradeshow	DC (April 3)
HSMIAI Affordable Meetings Tradeshow	Chicago (April 9-10)
Meeting Explorations Conference- Georgia Chapter of Meeting Professionals International	Atlanta (April 13-17)
USYS LOC Meeting	Raleigh (April 14)
Carolina Railhawks Kick-Off Banquet	Chapel Hill (April 16)
Greater Raleigh Sports Council Steering Committee Mtg.	Raleigh (April 17)
National Club Softball National Championships	Cary (April 17-19)
USTA National Campus Championships	Cary (April 17-19)
Deep South Classic	Raleigh, Durham, Chapel Hill (April 18-20)
National Association of Sports Commissions	Omaha, NE (April 22-25)
Association Executives of North Carolina Annual Golf Outing	Greensboro (April 28)
USYS LOC Meeting	Wilson (April 30)