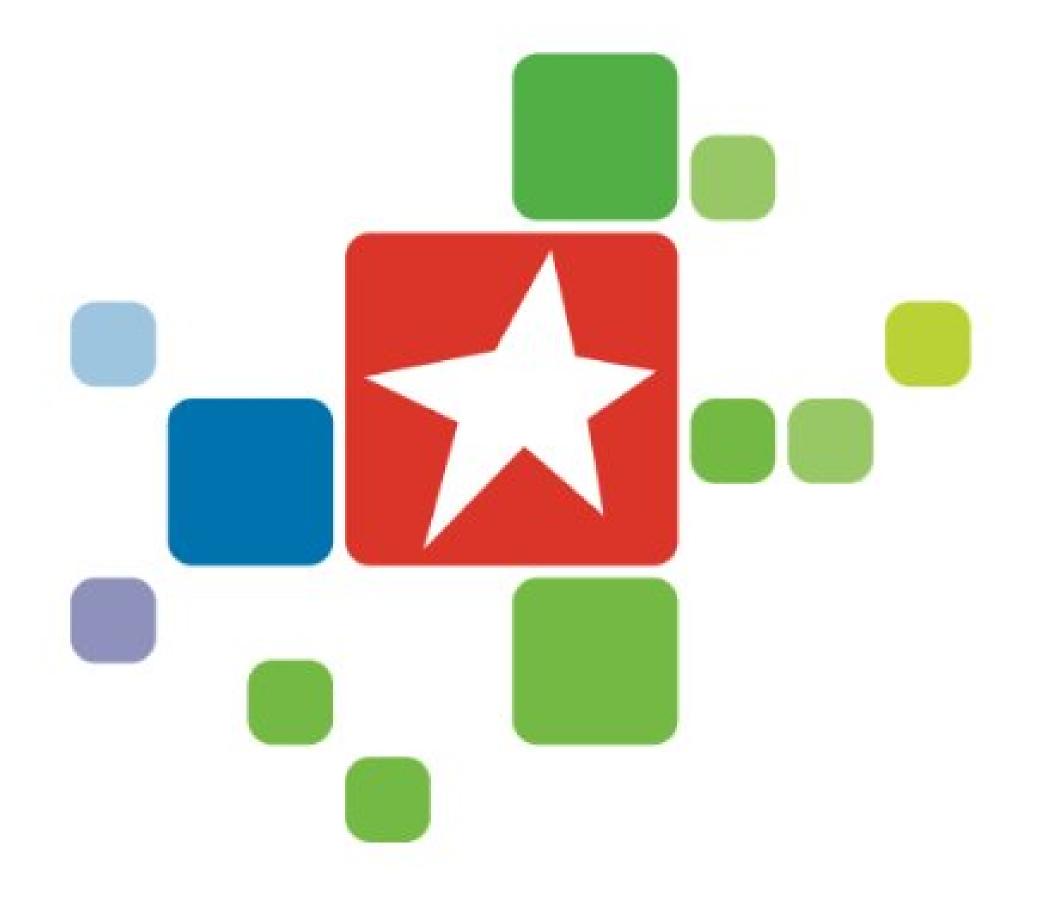


Welcome! to Tourism Talk Live!

TriGolf Thurs., Nov. 7, 2024 • 10am



Andrew Baker, TMP, FEP

Marketing Manager 919.645.2684 abaker@visitRaleigh.com



Tri GQIf

Offirst tee triangle

GRCVB "LEISURE TOURISM" ADVERTISING July 2023 – July 2024









FISCAL YEAR 2024

APPROACH

- Prioritized North Carolina markets but continued to increase spend in adjacent states.
- Tested support in Atlanta with both digital tactics and streaming TV.
- Continued streaming TV in NC, SC and VA.
- Added minimal Linear Cable in SC and continued in NC.



FY24 CAMPAIGN HIGHLIGHTS | LEISURE

53,000,000 IMPRESSIONS



ADDED VALUE WORTH

BONUS IMPRESSIONS AND RESEARCH

RESEARCH APPROACHES



SPECTRUM DATA

Rich data partnerships in the travel space (OTA Data).

Trusted source of projecting to total universe.



EPSILON DATA

Credit card insights provide geographic location, behaviors, lifestyles, purchase histories, purchase habits, and more.

RESEARCH APPROACHES



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LEISURE - FY24 RESULTS - SPECTRUM





- Website traffic is vital to the overall effort; however, we strive to connect in-market spending to advertising investment whenever possible.
- •Spectrum is one of the media partners we have been working with for a couple of years and they are able to provide **economic impact** directly related to their advertising campaign.
- The Spectrum Cable and Streaming TV spend drove more than **\$27 million** in measured visitor spending as of August 2024 (30-day lag window from when campaign ended in June).
- •The majority of the spend was with Streaming TV but 15% of the spend was Linear Cable 71% of hotel revenue came from households exposed to both Linear TV and Streaming TV campaign.

643

RETURN ONAD SPEND

- Adara's benchmark range for ROAS is 5-6 times with 8-10 ROAS on the very high end.
- The Visit Raleigh campaign reached the right people in the right places.

5096 of ALL hotel revenue

Spectrum Reach exposures accounted for nearly half of ALL hotel revenue Adara observed in the Raleigh market.

TOP MARKETS

Visitors from Charlotte, NC, accounted for 19% of hotel bookings.

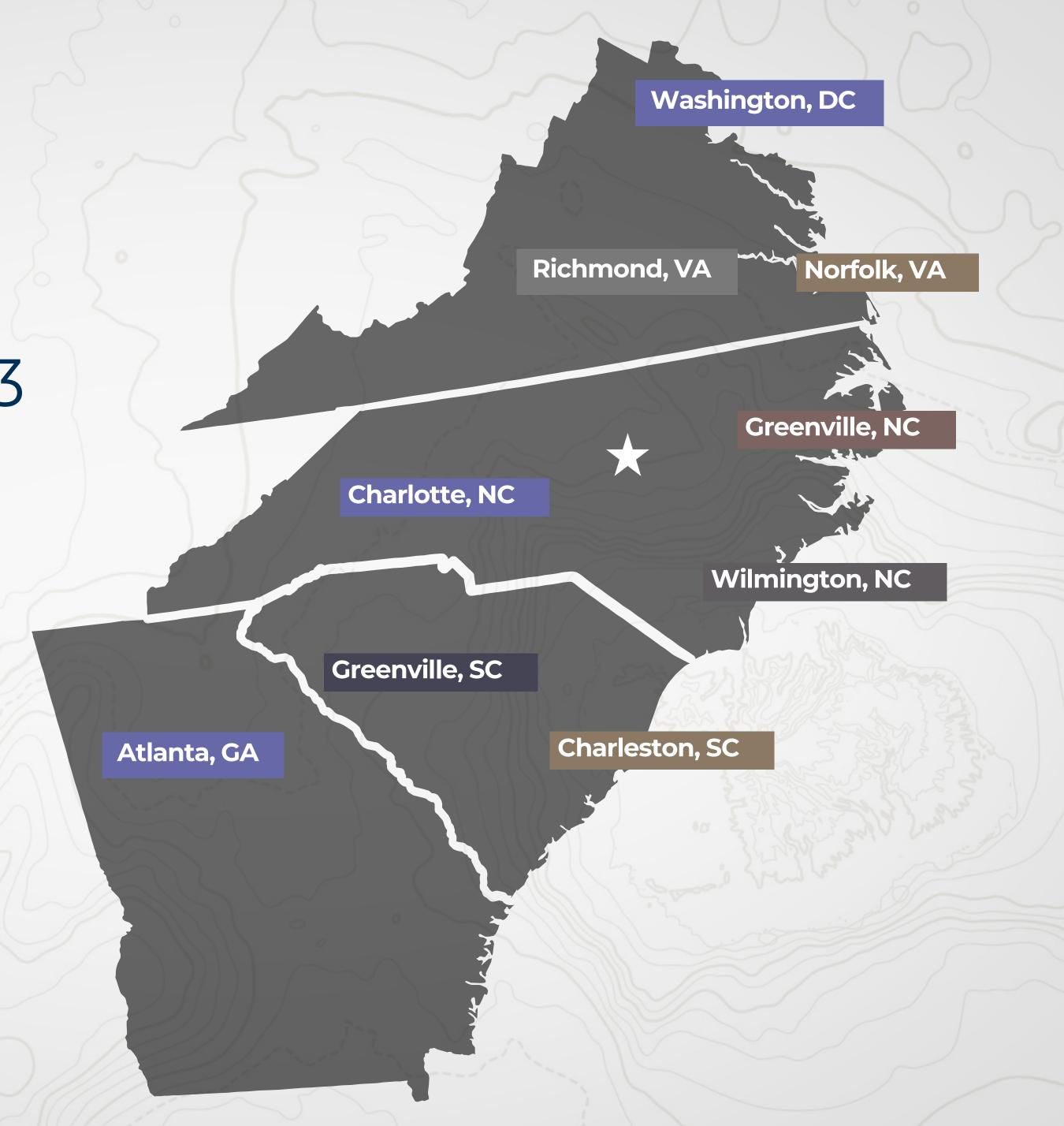
ORIGIN BY DMA Charlotte Raleigh-Durham Greensboro Greenville-New Bern-Washington Wilmington

58% of all bookings originated from DMAs within North Carolina.

TOP MARKETS

Atlanta moved to #3 from #9 last year.

Washington, DC, moved to #5 from #7.



GUEST DETAILS

The majority of guests were couples, and they booked around 7 days out from their trip.

Guest stayed for two nights, and the average daily rate was \$167.

70% of these guests stayed in Raleigh, 13% in Cary and 8.5% in Morrisville.

TOP HOTEL VARIABLES BY CITY BOOKED

City	% of Bookings	Avg. Length of Stay	Avg. Advance Purchase	Avg. Daily Rate
Raleigh	70.2%	2.06	7.89	\$179.73
Cary	13.85%	1.86	6.79	\$141.98
Morrisville	8.51%	1.82	6.43	\$125.72
Garner	2.38%	2.00	4.63	\$123.85
Apex	2.20%	2.21	7.13	\$141.57
Wake Forest	1.95%	2.14	6.90	\$141.51
Fuquay-Varina	0.70%	1.97	4.73	\$113.01
Holly Springs	0.06%	2.09	7.84	\$171.05
Knightdale	0.06%	1.84	8.21	\$129.21

RESEARCH APPROACHES



SPECTRUM DATA

Rich data partnerships in the travel space (OTA Data).

Trusted source of projecting to total universe.



EPSILON DATA

Credit card insights provide geographic location, behaviors, lifestyles, purchase histories, purchase habits, and more.

LEISURE - FY24 RESULTS - EPSILON



- •Epsilon is another partner that provides economic impact data in the form of credit card transactions.
- •The Epsilon spend drove more than **\$23 million** in measured visitor spend as of August 2024.

EPSILON - LIST OF CATEGORIES



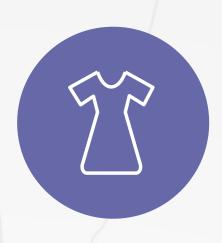




Restaurants, Bars, Food Halls

GROCERY

Grocery Stores & Specialty Markets



RETAIL

Big Box, Local Retail, Specialty Stores



GAS & CONVENIENCE

Gas Stations & Convenience Stores



RECREATION & ENTERTAINMENT

Attractions, Museums, Vehicle Rentals, Cruise & Tours, Golf, Fishing, Sports Events etc.

CAMPAIGN METRICS

Measurement Window: August 2023 - August 2024



\$23.2M

total messaged visitor spend

Spend in destination zips from visitors who received an ad

\$95.5K

investment Campaign spend \$242:1

ROAS

Return on ad spend. Every dollar of investment resulted in X dollars of visitor spend



838K

unique individuals reached

Number of individual people messaged with a campaign ad

91.7K

total visitors

Number of people messaged with a campaign ad who went to the destination zips

10.9%

messaged traveler rate

Total visitors/unique individuals reached



421.8K

total transactions

Number of captured non-cash transactions in destination zips from visitors who received an ad

4.6

average purchases per visitor

Total transactions/total visitors

\$253

average messaged yield per visitor

Total messaged visitor spend/total visitors

TOP MARKETS

31% of measured visitor spend generated in Wake County came from the Charlotte DMA—that measured spend was driven by 39% of visitors.

The Top 5 feeder markets drove 77% of visitors and 69% of visitors spend.

Atlanta moved into the top 10.



VISITATION AND SPEND BY AREA

Area	Visitor Spend	Visitors	% Total Visitor Spend	Yield Per Visitor
North Hills	\$2,361,131	6,447	10.20%	\$366
Crabtree Valley Area	\$1,355,851	4,897	5.80%	\$277
Cary	\$1,339,599	4,759	5.80%	\$281
Wake Forest	\$1,288,523	3,072	5.50%	\$419
Downtown Raleigh, South Raleigh	\$1,191,013	4,888	5.10%	\$244
Capital Blvd. Corridor	\$1,188,691	4,392	5.10%	\$271
RDU Airport & Hotels, Morrisville	\$1,081,895	5,429	4.70%	\$199
Apex	\$989,028	2,696	4.30%	\$367
N.C. State, Lenovo Center	\$951,882	4,750	4.10%	\$200
Fayetteville Street, Convention Campus	\$886,875	2,952	3.80%	\$300



FISCAL YEAR 2024

LEARNINGS

- While North Carolina markets continue to lead, markets beyond North Carolina are seeing growth.
- Investing in both streaming TV in NC, SC and VA and Linear Cable in NC markets drove revenue.
- Revenue data continues to help prioritize key markets outside of NC.

FISCAL YEAR 2025

IMPLICATIONS

- Prioritize North Carolina markets but continue to increase spend in adjacent states. (NC received 37% of spend.)
- Increase investment in tactics that highlight the brand experience like streaming TV and video.
- Measure. Optimize and Learn. 82% of the spend is measurable by economic metrics (update from 53% in FY24).





Resources used throughout the travel path to purchase

Travelers use a variety of resources throughout the path to purchase, but turn to different resources for different phases of the journey.

O Social media

O Destination site

O Search engine

O OTA

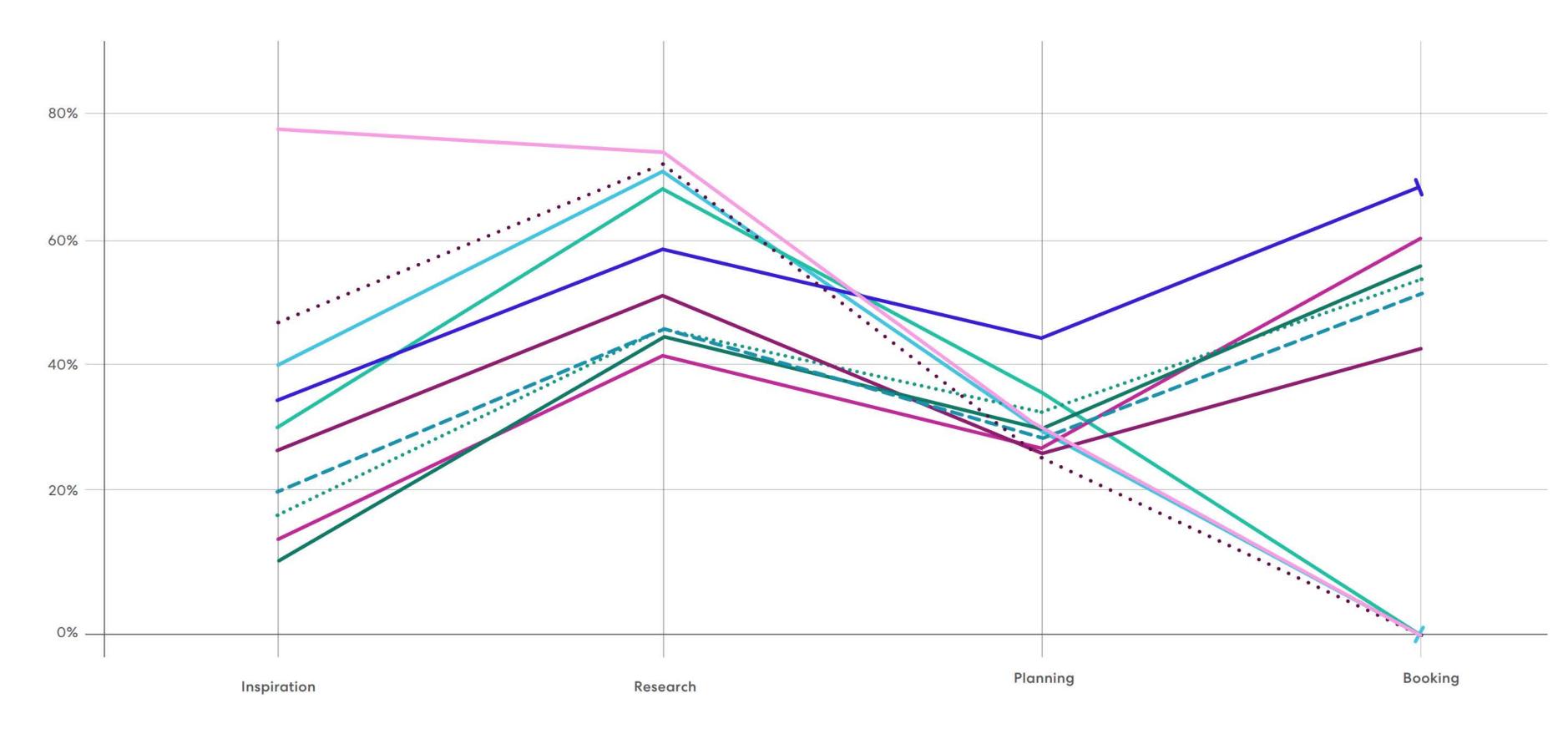
O Meta travel site

O Vacation rental site/app

O Hotel site/app

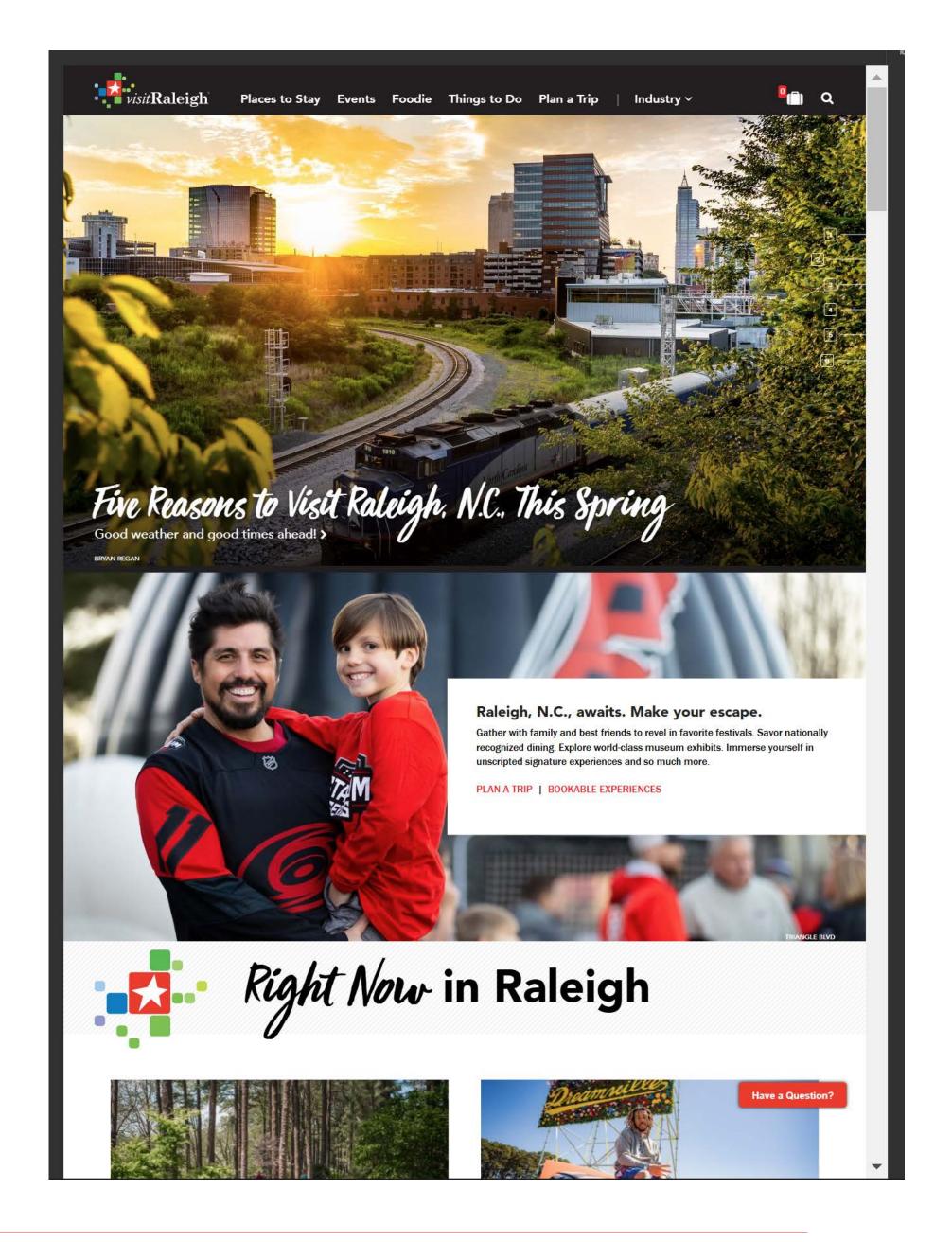
• Airline site/app

→ Car rental site/app



Source: Expedia Group, 2023







Rafat Ali in • Following
CEO/Founder, Skift. Perpetually exhausted dad of two hyperac...
Visit my website

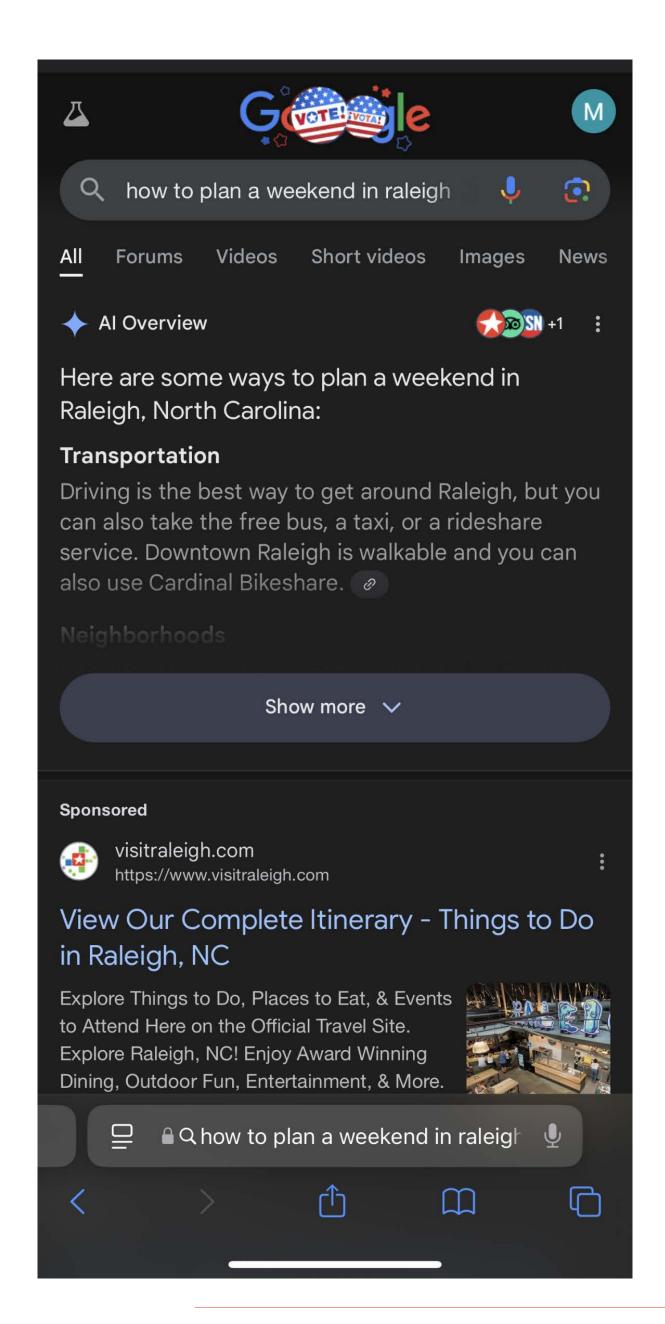
5mo • 🕓

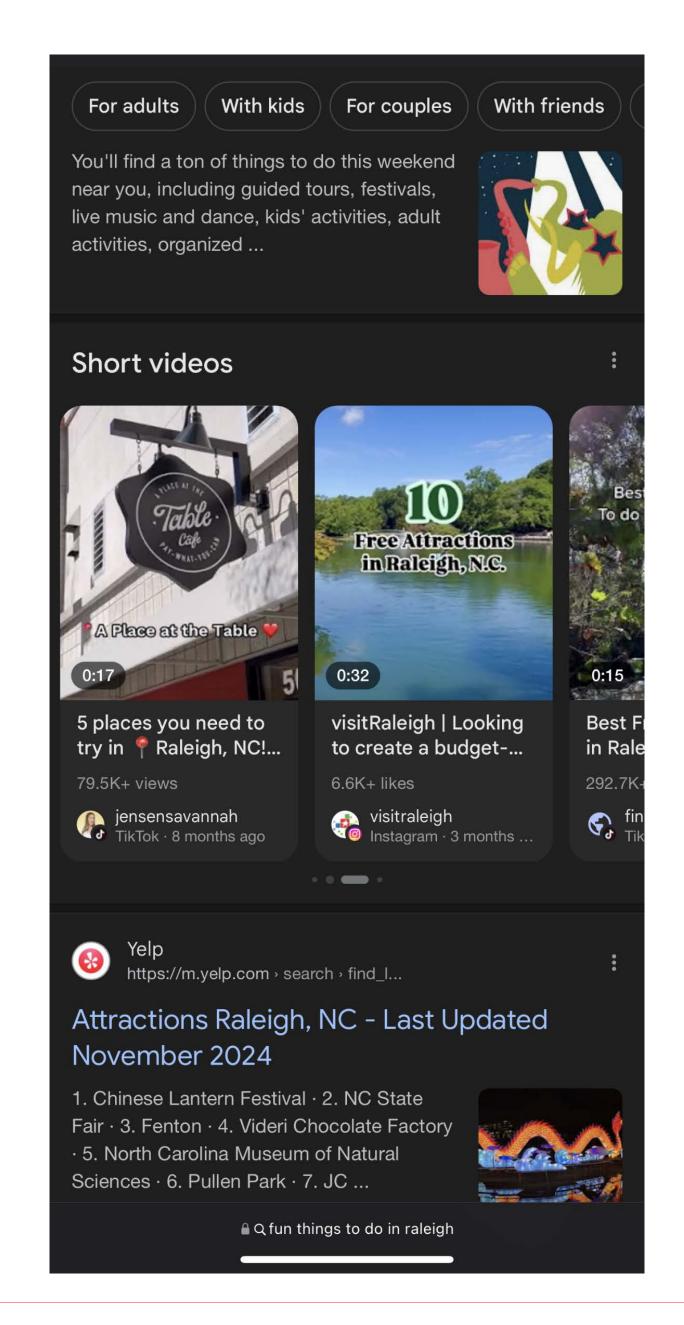
The last week has been big for AI, with significant AI-related announcements from OpenAI, Google, and Expedia. Your head would spin, and mine did, until I read enough to figure out two common themes emerging -- and breakdown from there -- and what this means for travel industry:

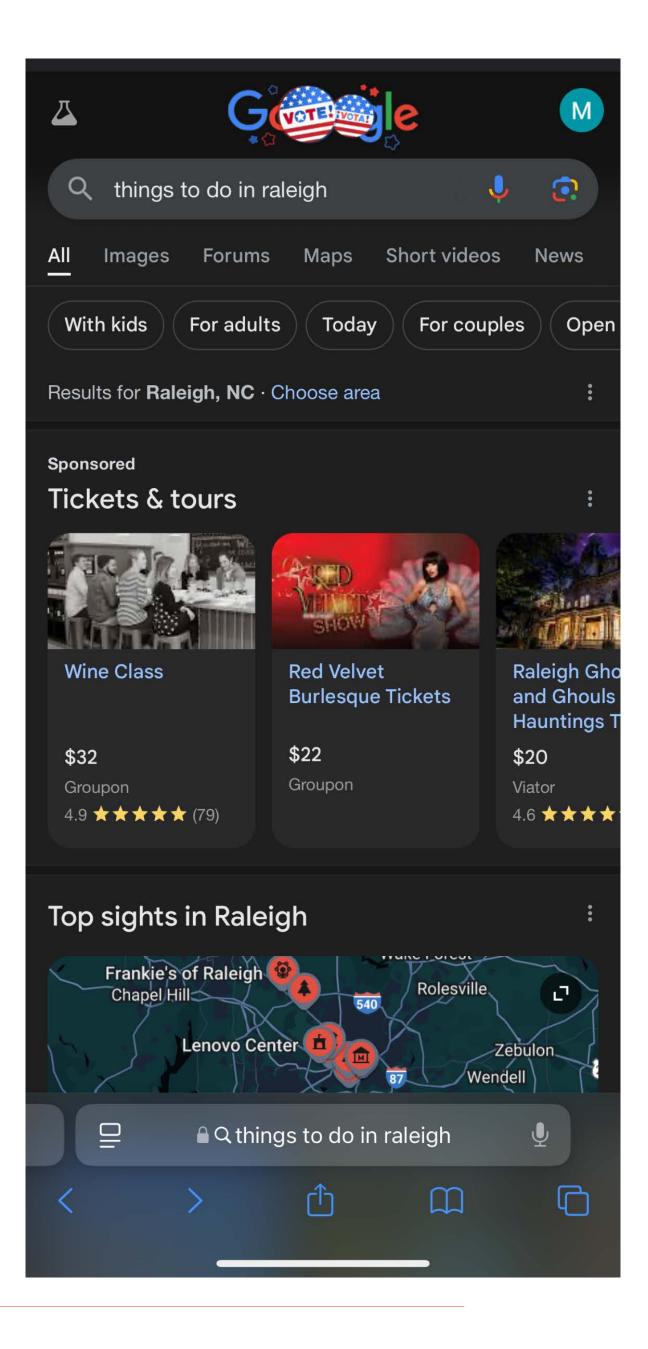
- -- Less ad inventory on Google but potential for new ad opportunities on OpenAl.
- -- Substantial change coming to how travel companies acquire customers online.
- -- Any travel entity that used content as a lead funnel into their offering must adapt to the changing search landscape to maintain visibility. Tourism board consumer websites, which already aren't the most trafficked sources of travel/tourism information, may be obsolete in coming years.
- -- I am impressed by Expedia's aggressive experimenting with AI integration, though its solutions may be transitional compared to Google/OpenAI.
- -- The big tech battle to watch: the Google vs OpenAI battle.

Google Zero is here — now what? / Search is an invisible platform that shaped the entire web. And it's changing.

By Nilay Patel, editor-in-chief of the Verge, host of the **Decoder podcast**, and co-host of **The Vergecast**.







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The Best Reasons to Visit Raleigh, N.C., in 2024

Wednesday, January 31, 2024, 12pm by visitRaleigh



A new year means new opportunities, and we've got a great feeling about good news on the horizon in the Raleigh area. For 2024, there are special events on the calendar, new places to explore, big restaurant openings lined up and plenty more to look forward to in Raleigh, N.C.!

Jaguar Bolera delivers eating, drinking and dinking

This 50,000-square-foot playground—an "eatertainment" concept prepared to offer big food and fun—will open at the live-work-play Raleigh Iron Works just north of downtown Raleigh this year.

Trip Enhancing

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Six Murals That Honor Black History and Culture in Raleigh, N.C.

Wednesday, February 07, 2024, 9am by visitRaleigh



The Raleigh area is home to a vibrant collection of murals that pay tribute to the rich history and cultural heritage of the City of Oaks and beyond. A number of those murals are dedicated to Black history, community and culture—triumphant depictions and stunning works of art that bring color and life to the city's streets and serve as powerful reminders of the contributions and resilience of Black Americans.

Below are six spots to see some of this super important art!

≺ Back to Page

How to Plan A Perfect Fall Bike Ride on the Neuse River Greenway Trail in Raleigh, N.C.

Wednesday, October 05, 2022, 9am by Michael Robson



Note: Peak fall colors generally arrive in the Raleigh area in late Oct. to mid-Nov. (so now is the time to book a trip to experience it in the best way possible)!

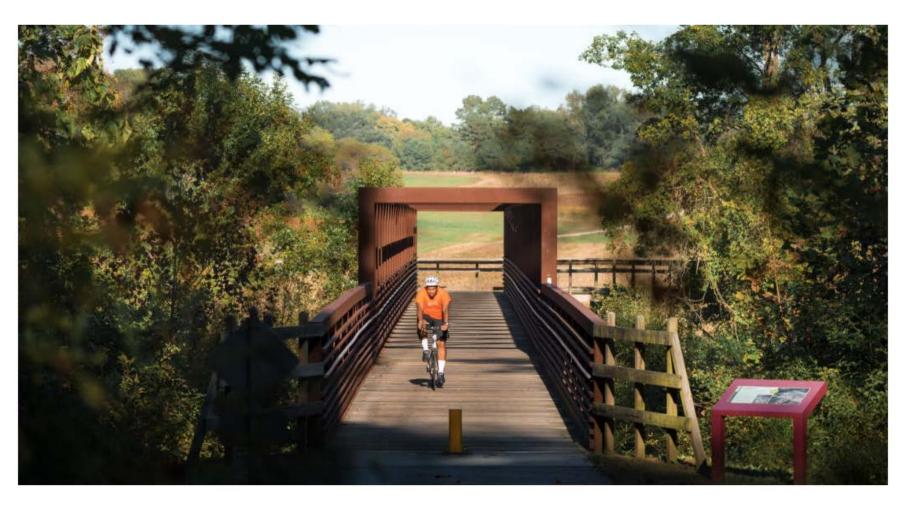
The Neuse River Greenway Trail—a 30-mile paved, uninterrupted greenway that stretches from Falls Lake in North Raleigh to the Wake County line in southeast Raleigh—is a year-round haven for outdoor recreation. With views of historic sites as well as winding boardwalk areas and

Trip Enhancing

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The Best Trails to Hike, Bike and Run in Raleigh, N.C.

Friday, April 12, 2024, 9am by visitRaleigh



There's no shortage of ways to find peaceful escapes in order to explore the outdoors in the City of Oaks. Use any of the Raleigh area's 180 miles of greenways—many of them connecting to attractions and letting you travel all over the destination—or numerous other miles of trails traversing through parks, and you'll find runners getting in workouts, cyclists out for leisurely rides, parents pushing strollers and people of all ages soaking up the fresh air. Below are some of our favorite spots to seek out solitude and sun!

♦ Back to Page

Art in Bloom at the North Carolina Museum of Art: March 13-17

Thursday, February 08, 2024, 9am by visitRaleigh



One of the can't-miss events of the year, Art in Bloom is prepared to return for a fiveday celebration of art, flowers and community at the North Carolina Museum of Art (and tickets are going to go fast!).

From March 13-17, more than 40 unique floral arrangements—some standing 10 feet tall—will be created on-site by world-class designers and florists and showcased throughout the museum's West Building.

Trip Enhancing

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In Bloom: Spring Gardens to Visit in Raleigh, N.C.

Friday, March 22, 2024, 9am by visitRaleigh



The days are longer, the weather is warmer and the flowers are blooming—sure signs of spring in the Raleigh area! The perfect season to explore parks and gardens budding with colorful flowers, use this list to get out and enjoy sunshine and the beauty of the City of Oaks.

WRAL Azalea Gardens

The WRAL Azalea Gardens, created by Capitol Broadcasting Company founder A. J. Fletcher as a service to the community, opened to the public in 1959. Packed with thousands of azaleas,

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Now Open: Three New Trip-Worthy Restaurants in Raleigh, N.C.

Friday, May 31, 2024, 9am by visitRaleigh



It's a great time to be a foodie in Raleigh.

Three highly anticipated dining spots—with incredible food, views and décor—have opened their doors in recent months (and the accolades have already started to roll in).

For date nights, celebrations or just a treat-yourself occasion, these new restaurants—in three different Raleigh neighborhoods—are ready to put on a show.

Trip Enhancing

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20 of the Best Brunch Spots in Raleigh, N.C.

Tuesday, April 23, 2024, 9am by visitRaleigh



Weekends are meant to be brunched on! Time spent with family and friends over stacks of blueberry pancakes or the perfect eggs Benedict should be cherished—in the Raleigh area, it is. We get asked about brunch spots all the time, so we've put together this list of some of the area's favorite places to convene for muffins and mimosas. Cheers!

Note: Reservations are always recommended, though a few on this list may be walk-in only.

St. Roch Fine Oysters + Bar

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The 10 Most Essential Free Attractions to Visit in Raleigh, N.C.

Wednesday, July 17, 2024, 9am by visitRaleigh



Often dubbed the "Smithsonian of the South" thanks to an abundance of free museums, historic attractions and educational institutions, Raleigh, N.C., has long been known as a budget-friendly family getaway destination for those in the Tar Heel State and beyond (Southern Living recently named the City of Oaks one of the seven best affordable Southern destinations for travel).

The attractions below are a perfect place to start in checking the Raleigh area's standout attractions off your must-visit list!

Trip Enhancing

★ Back to Page

A Guide to Carolina Hurricanes Hockey in Raleigh, N.C.

Friday, October 11, 2024, 9am by visitRaleigh



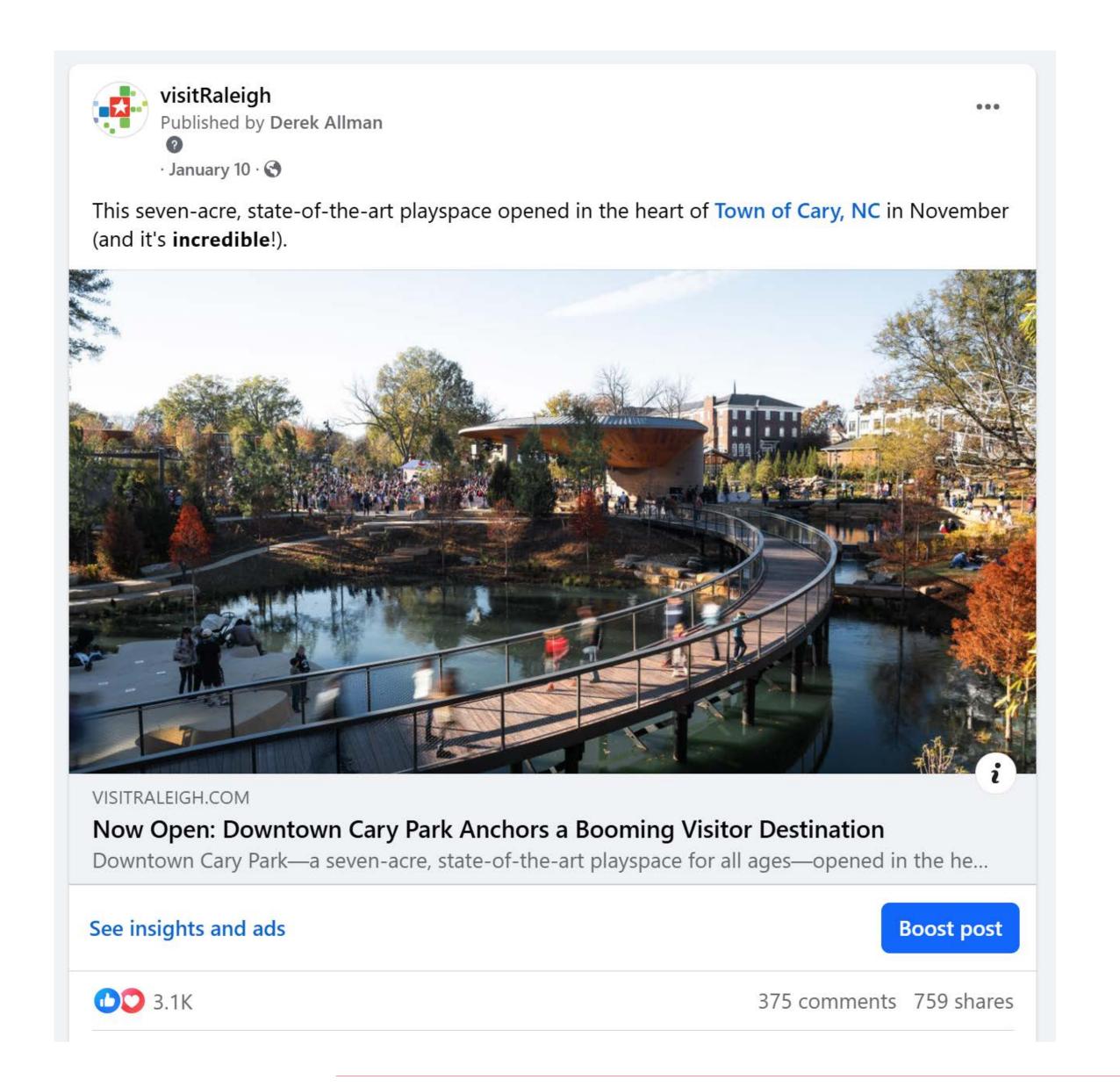
The most fun team in hockey.

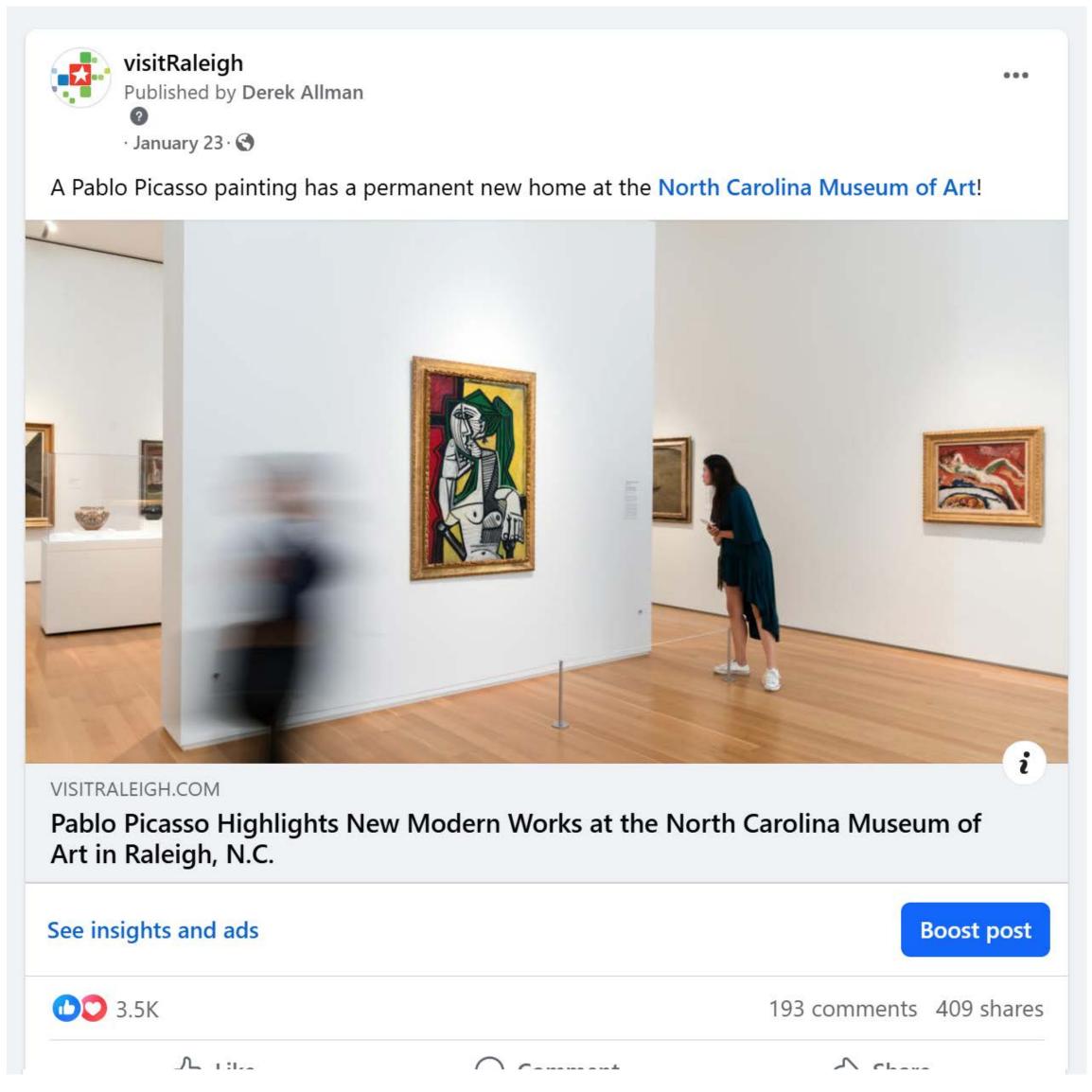
The loudest house in the NHL.

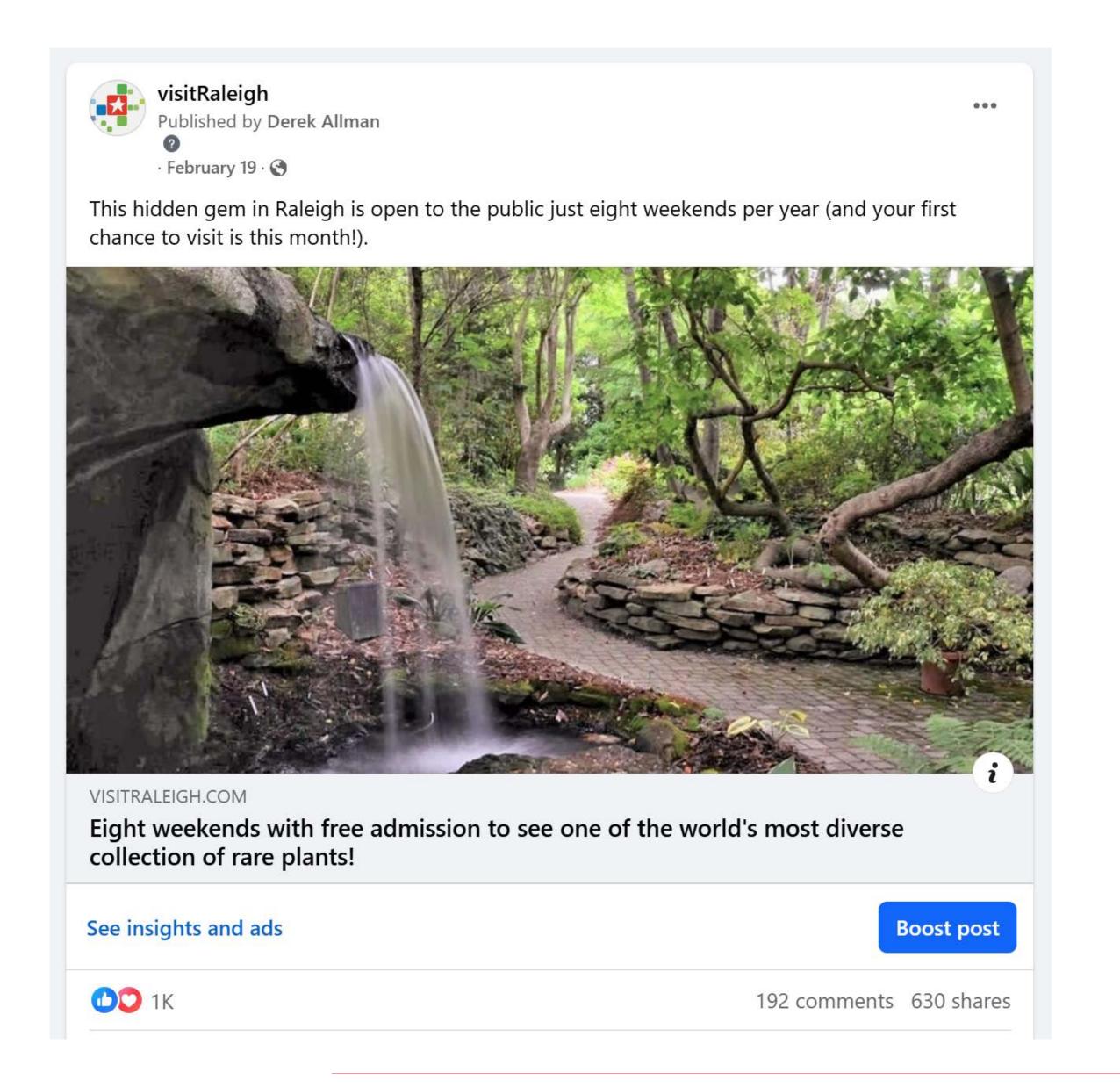
A perennial contender for the Stanley Cup.

The last six seasons have been a heck of a ride for the Carolina Hurricanes

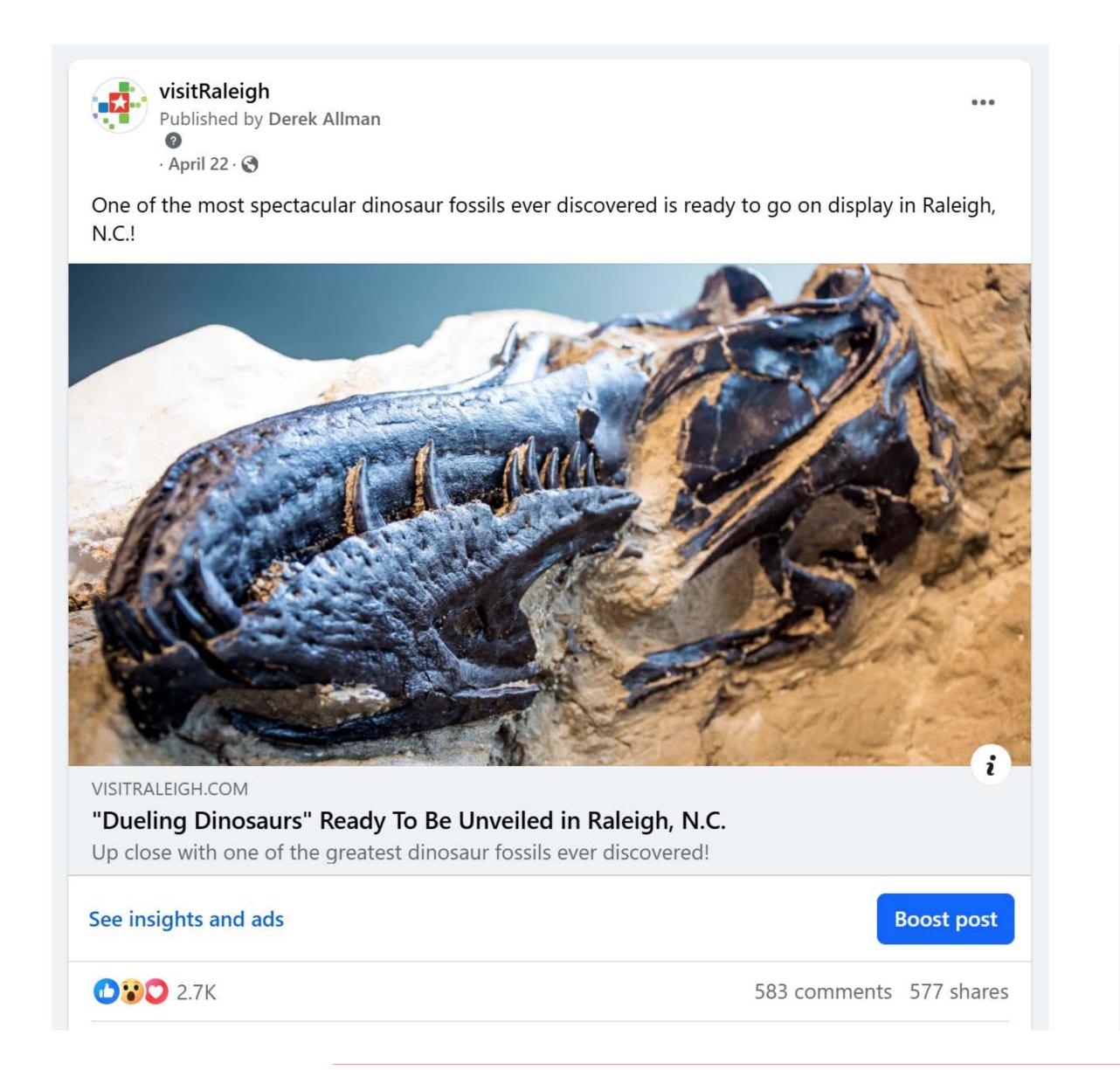
Owner Tom Dundon purchased the franchise in late 2017 former Canes player Rod

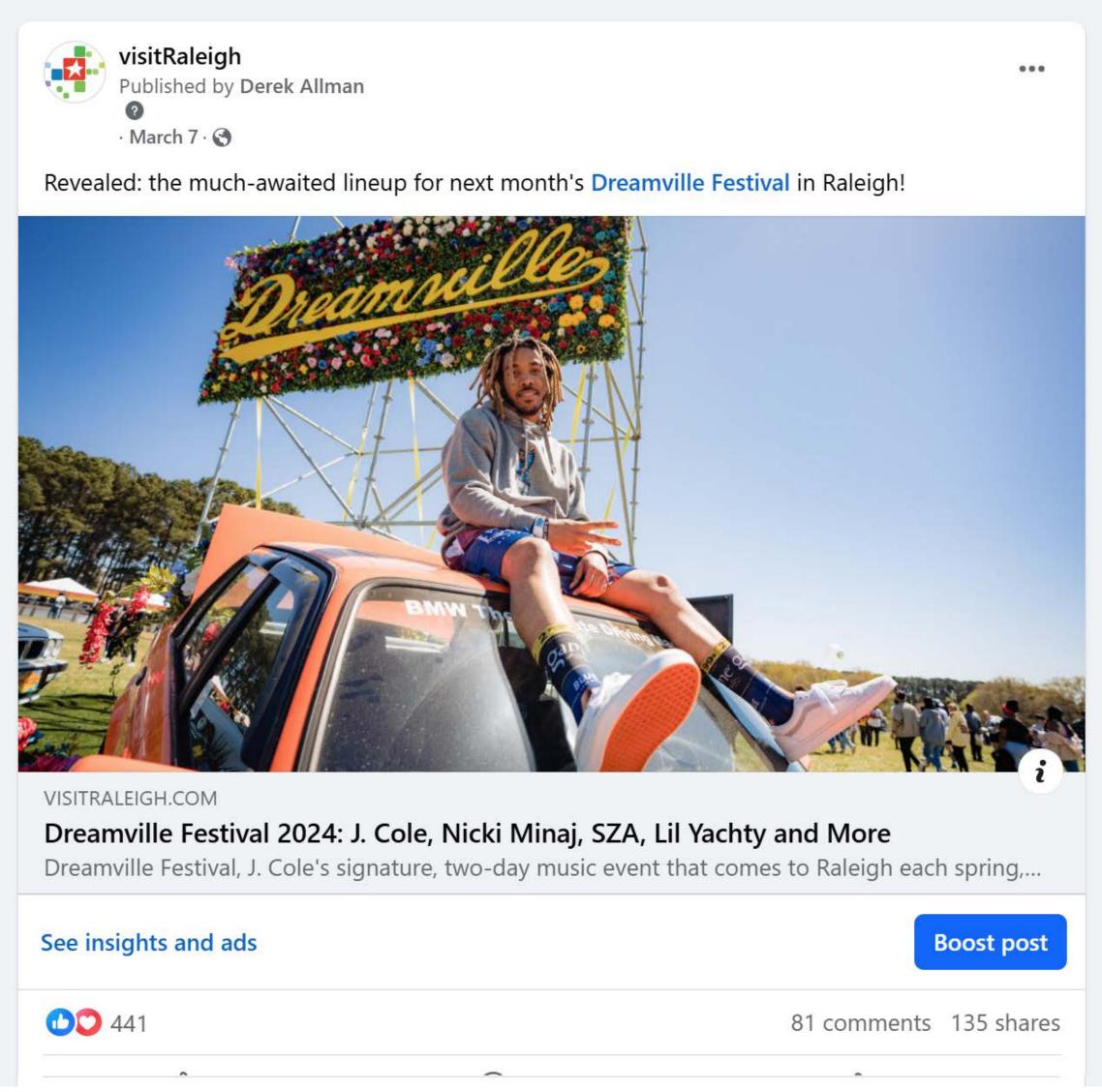


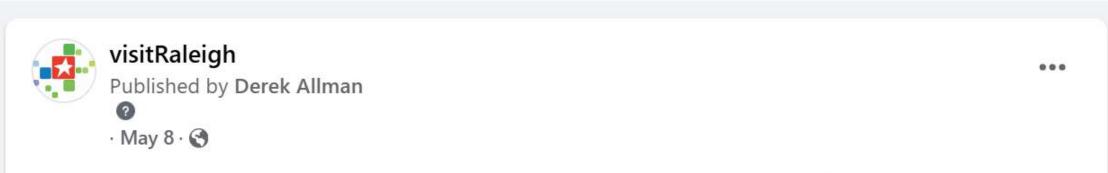












Music, pottery, painting, pickleball, silent disco (and so. much. more!). Artsplosure returns to downtown Raleigh this month!



VISITRALEIGH.COM

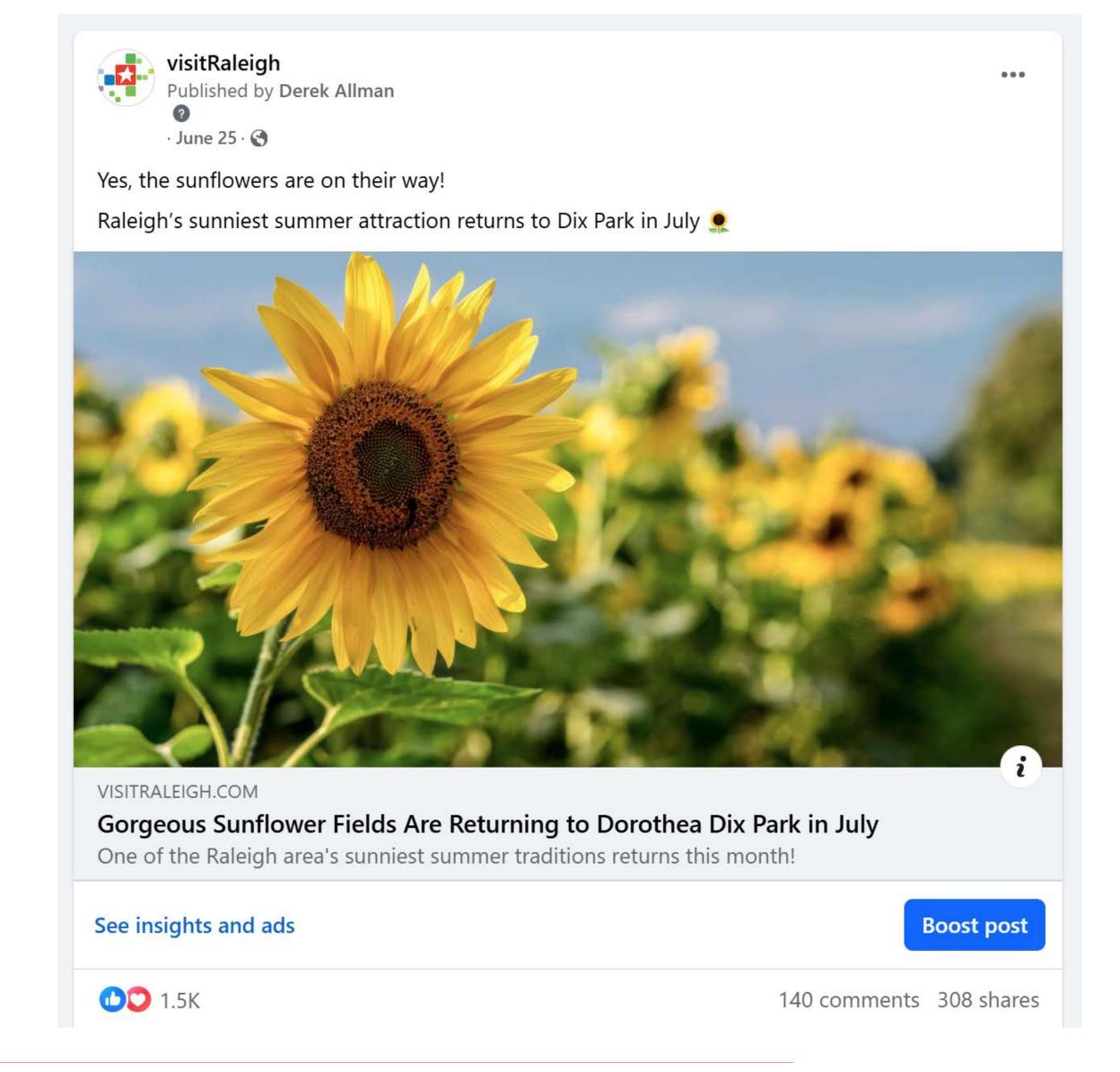
Celebrating 45 Years of Artsplosure in Raleigh, N.C.

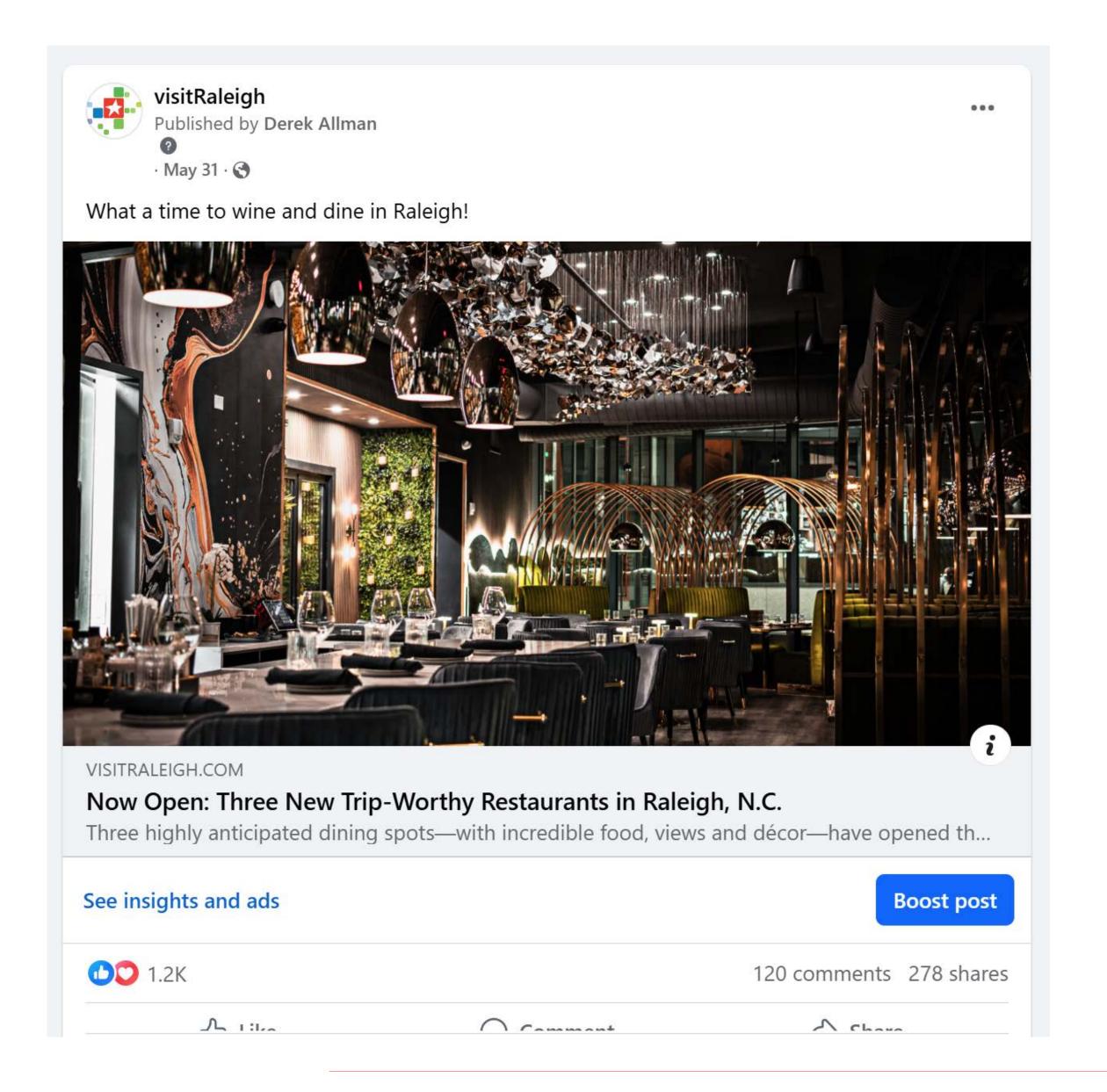
One of the Southeast's biggest (and longest-running) art festivals returns to downtown Raleig...

See insights and ads

Boost post

United Arts Council of Raleigh and Wake County and 615 others 24 comments 78 shares









Hootie & the Blowfish, Jelly Roll, Lake Street Dive, Post Malone, Jack the Radio, Sabrina Carpenter and so. much. more!



VISITRALEIGH.COM

70 of the Biggest Concerts This Fall in Raleigh, N.C.

Who's ready to rock? Live music is back in a big way this fall in the Raleigh area! Browse the bi...

See insights and ads

Boost post



125 comments 223 shares



Are you ready for 11 days of high-flying rides, deep-fried foods and nightly fireworks? It's time to plan for the N.C. State Fair!



VISITRALEIGH.COM

The N.C. State Fair is Back, Oct. 17-27, in Raleigh, N.C.!

Eleven days of high-flying rides, deep-fried foods, live music, stunt shows, nightly fireworks an...

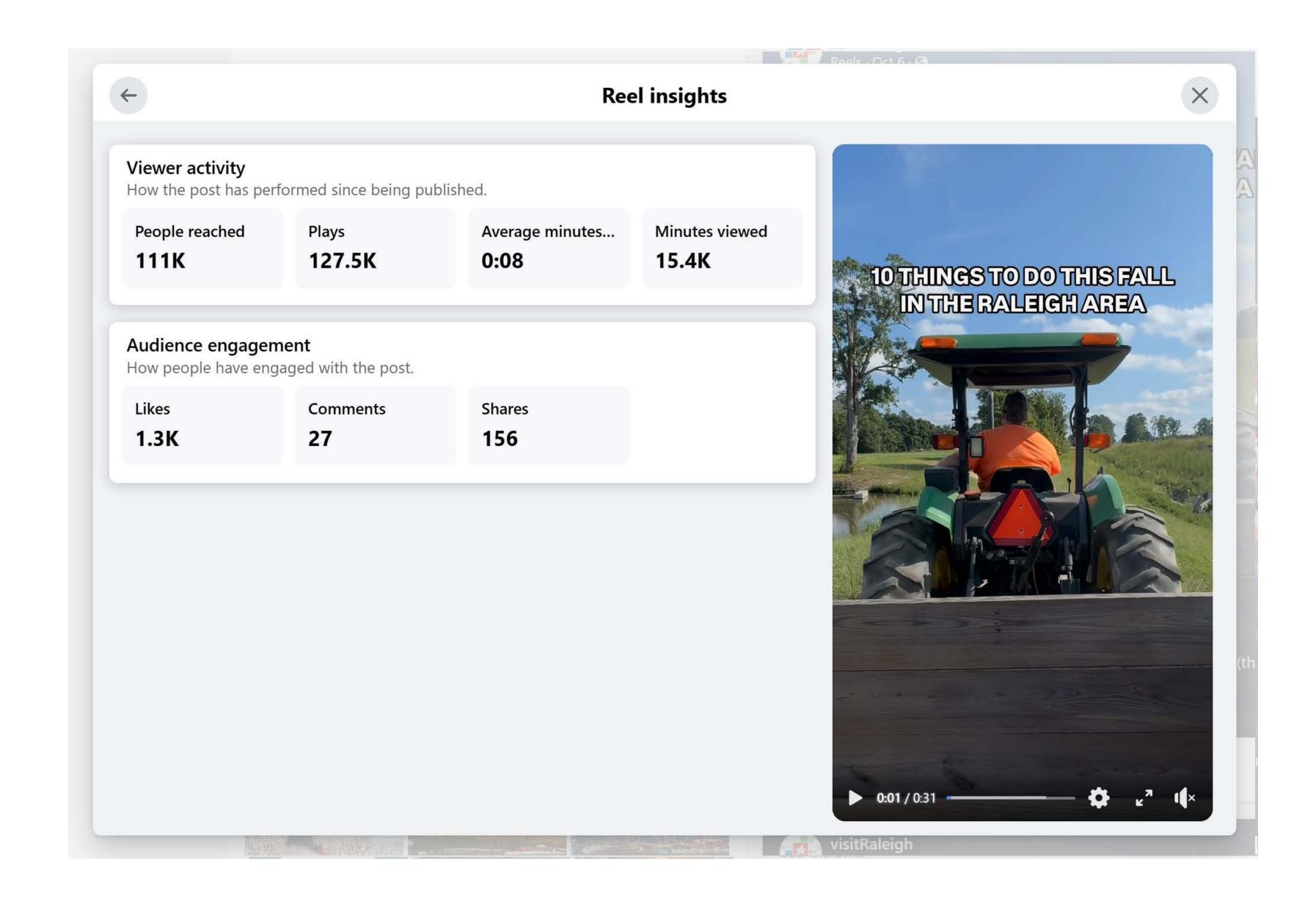
See insights and ads

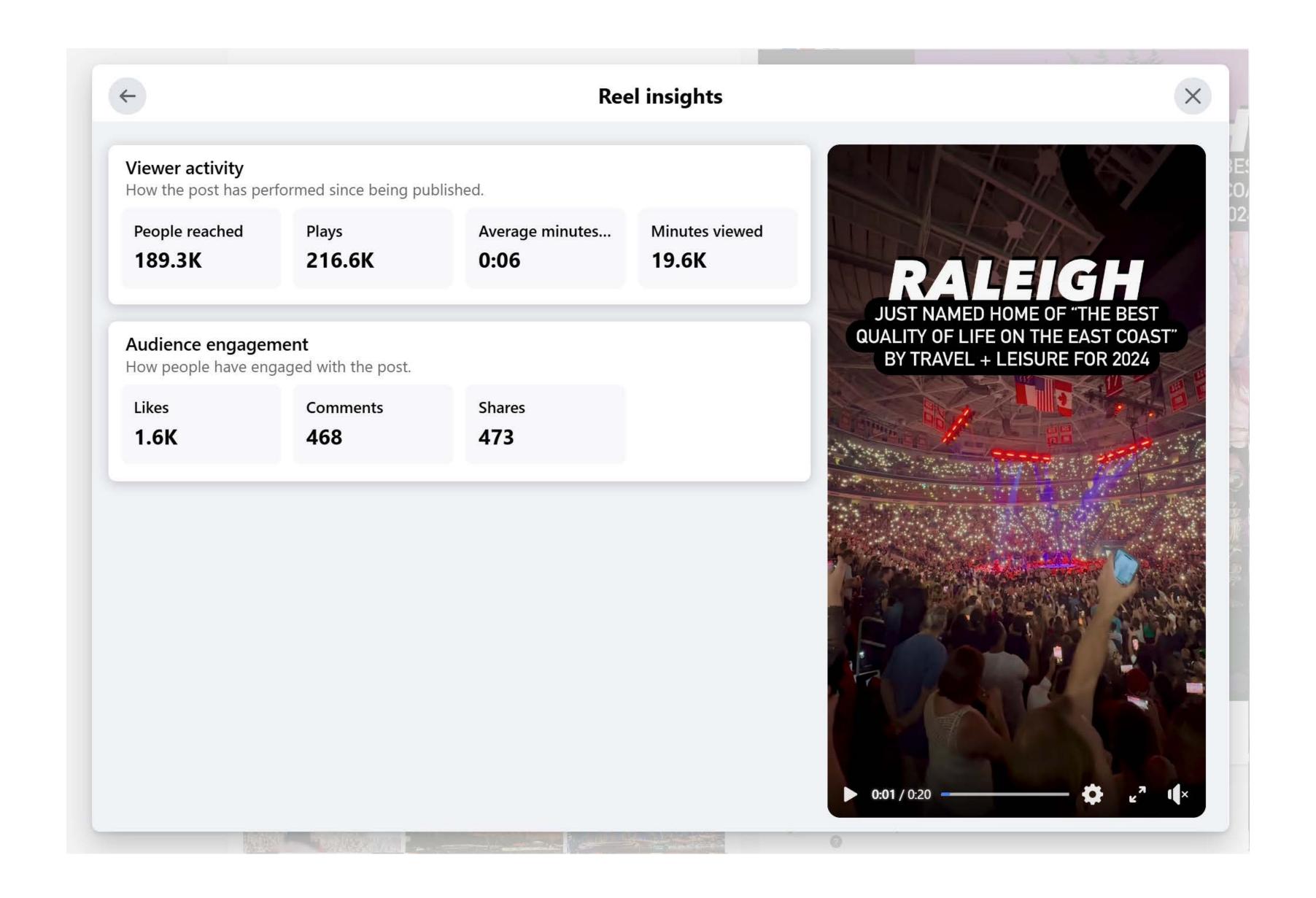
Boost post

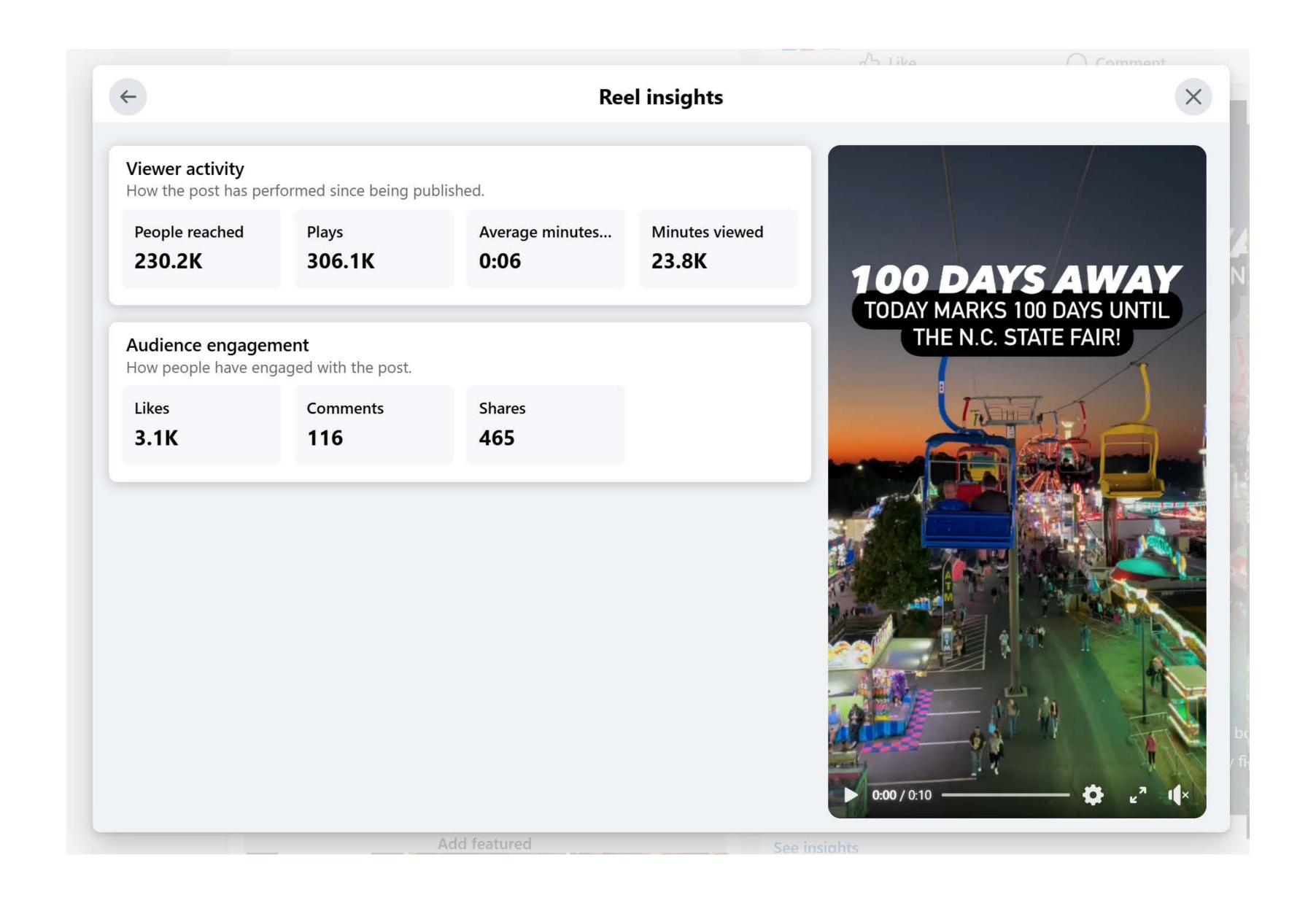


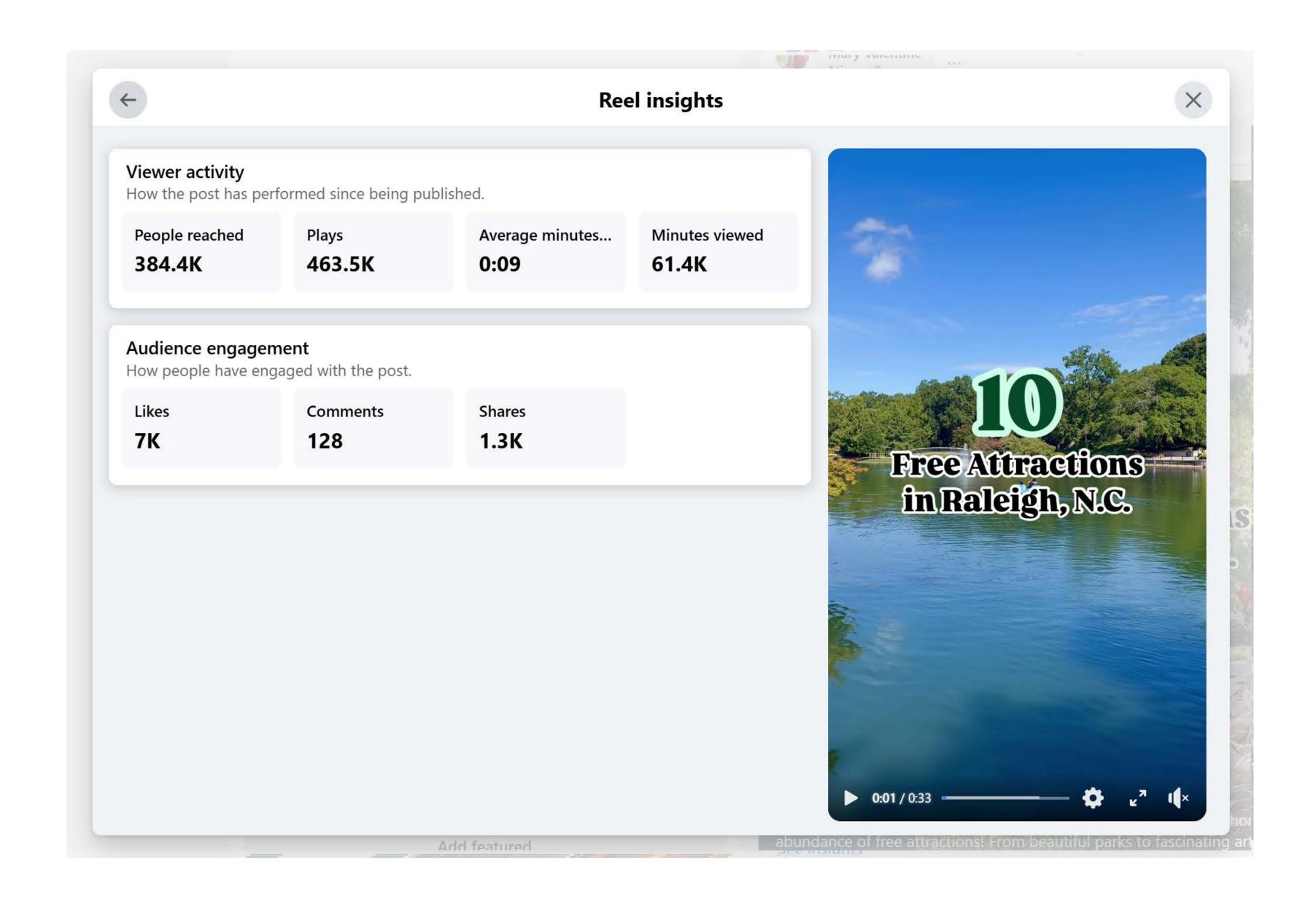
The Green Monkey, Saint Mary's School and 1.9K others

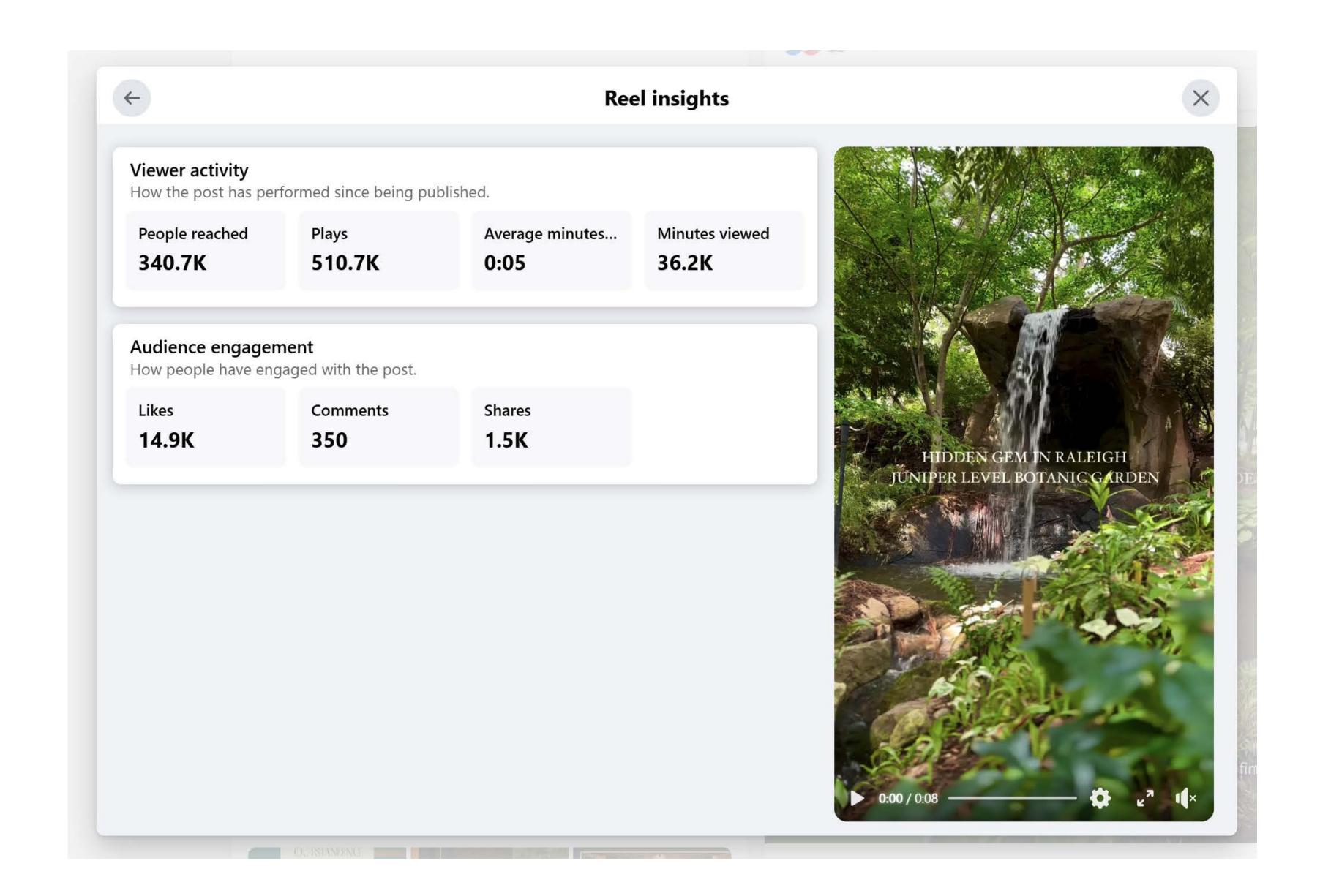
369 comments 1.1K shares

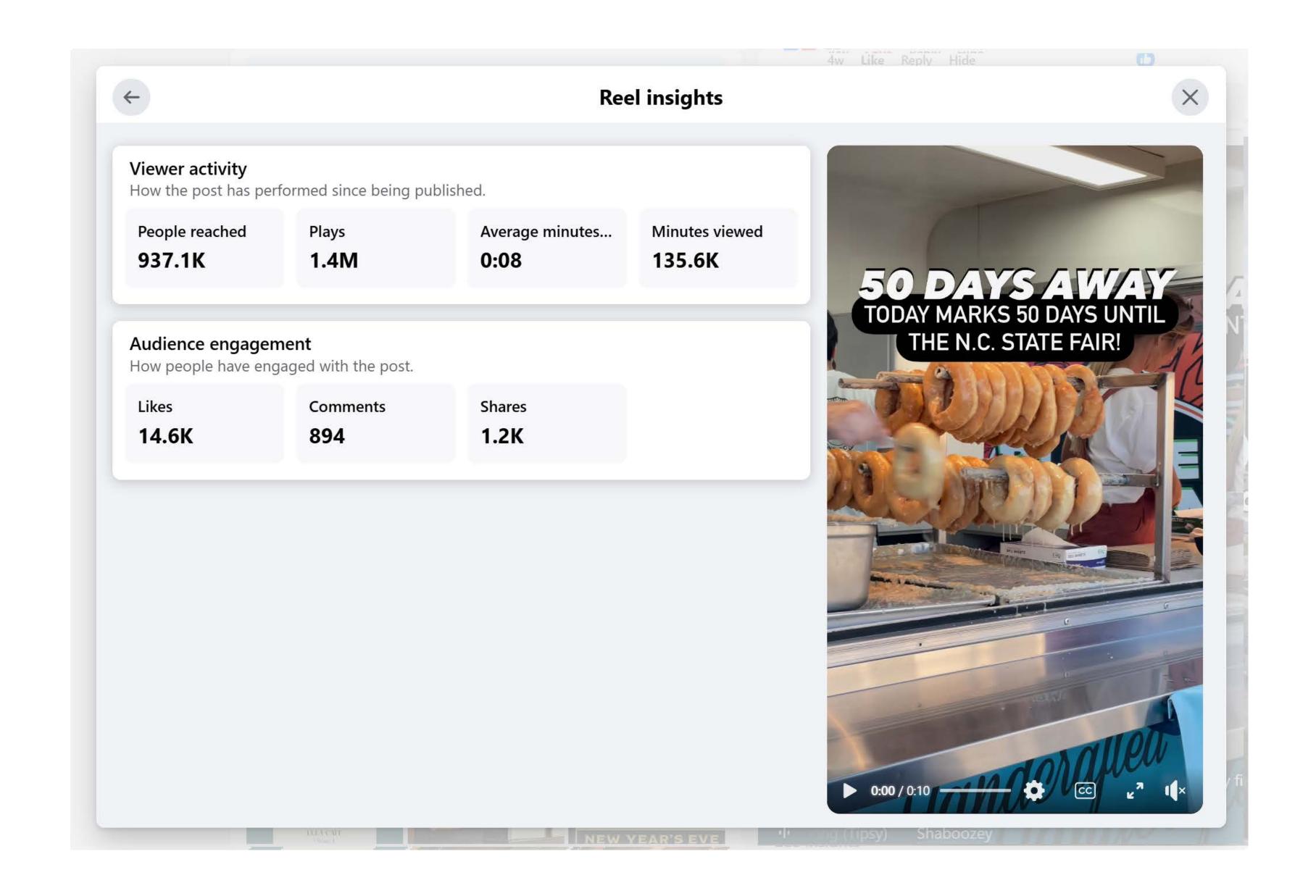


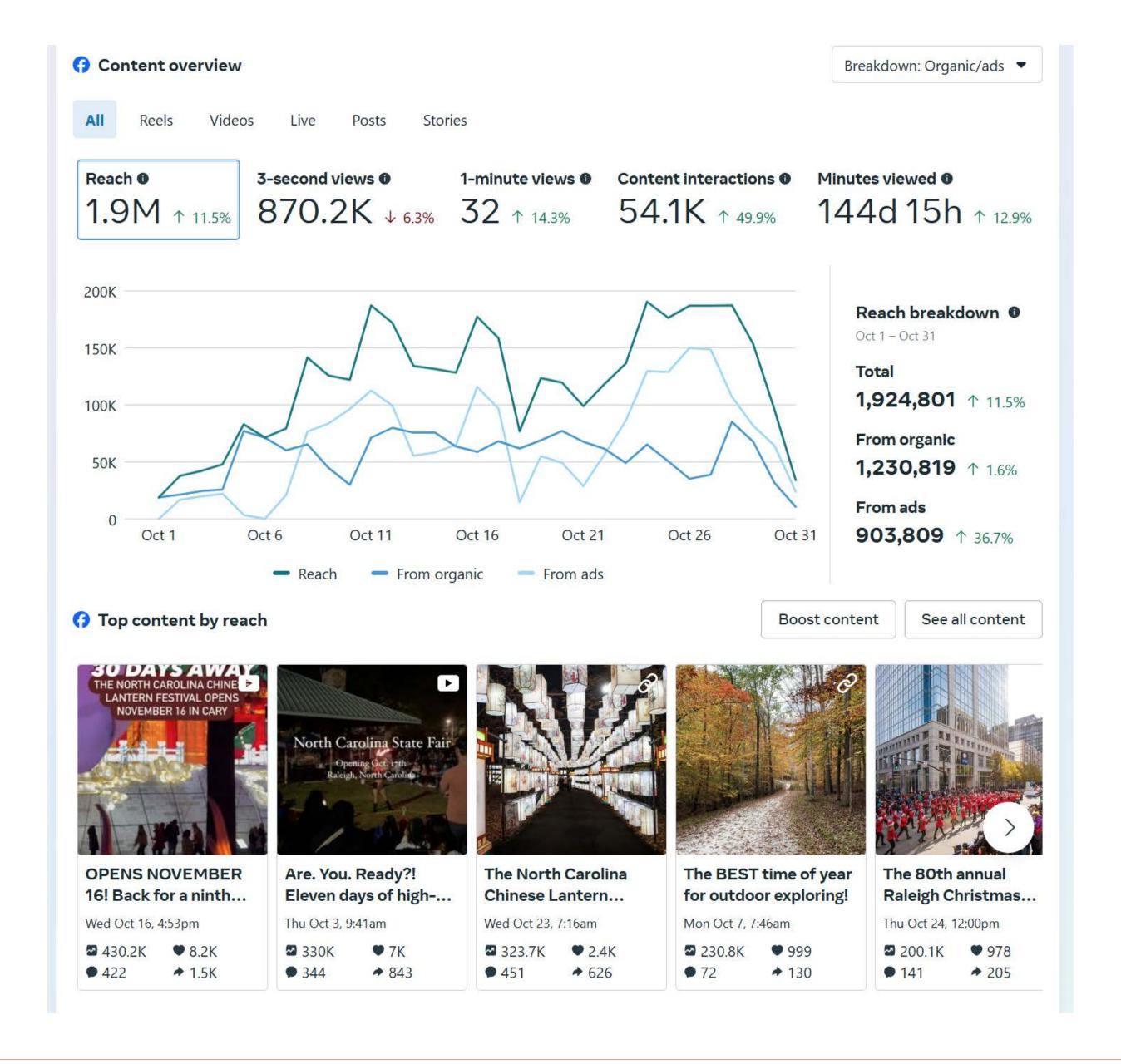


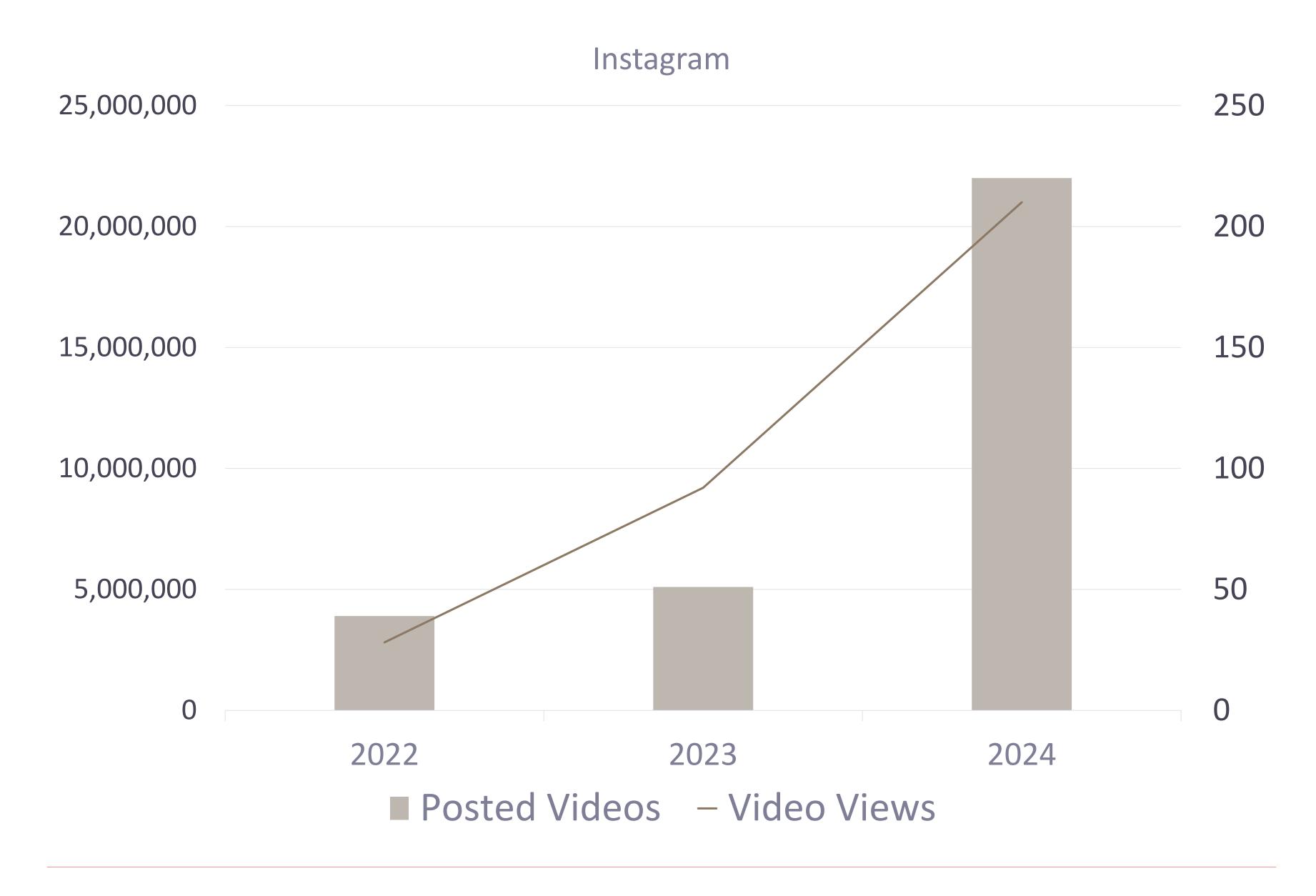


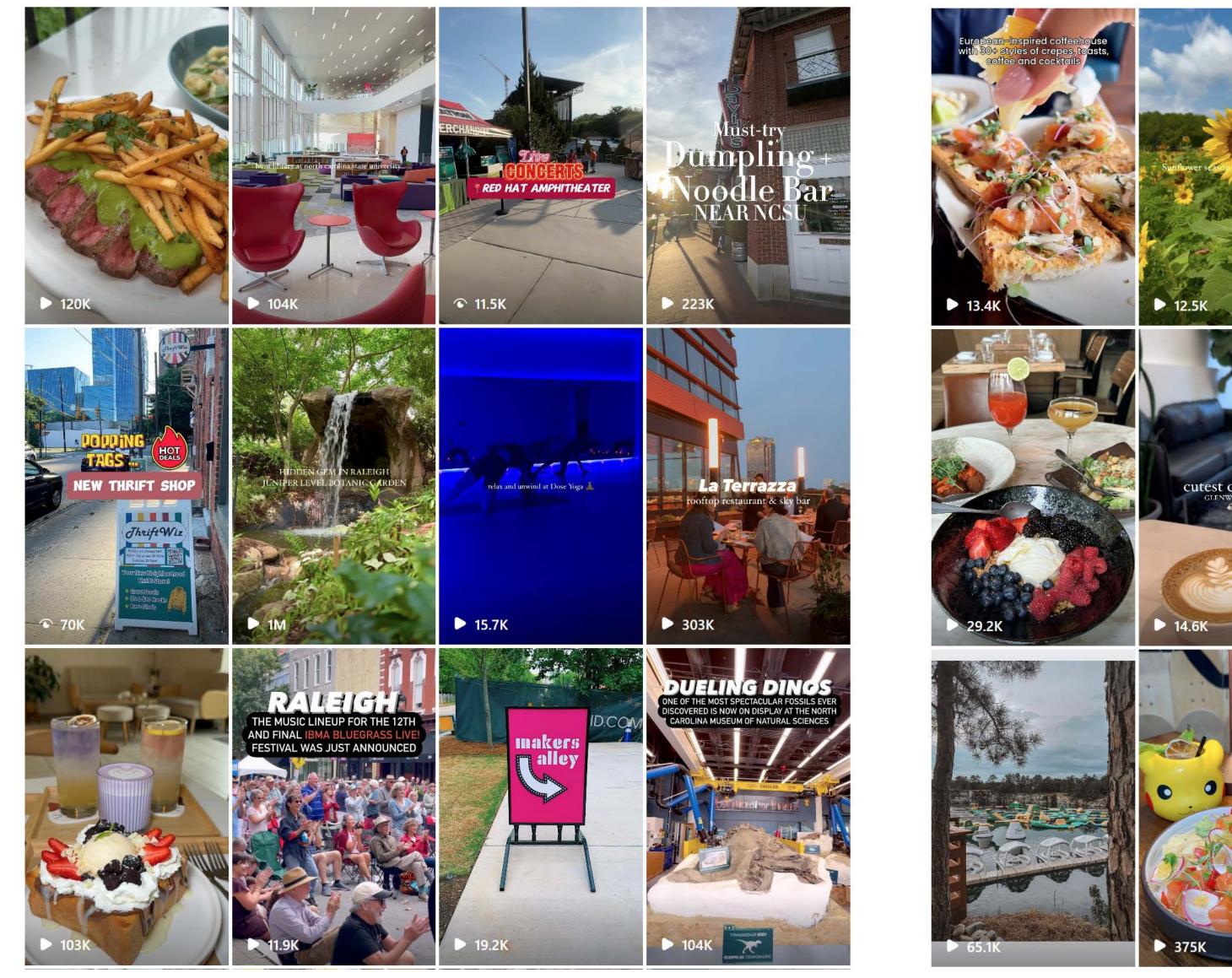


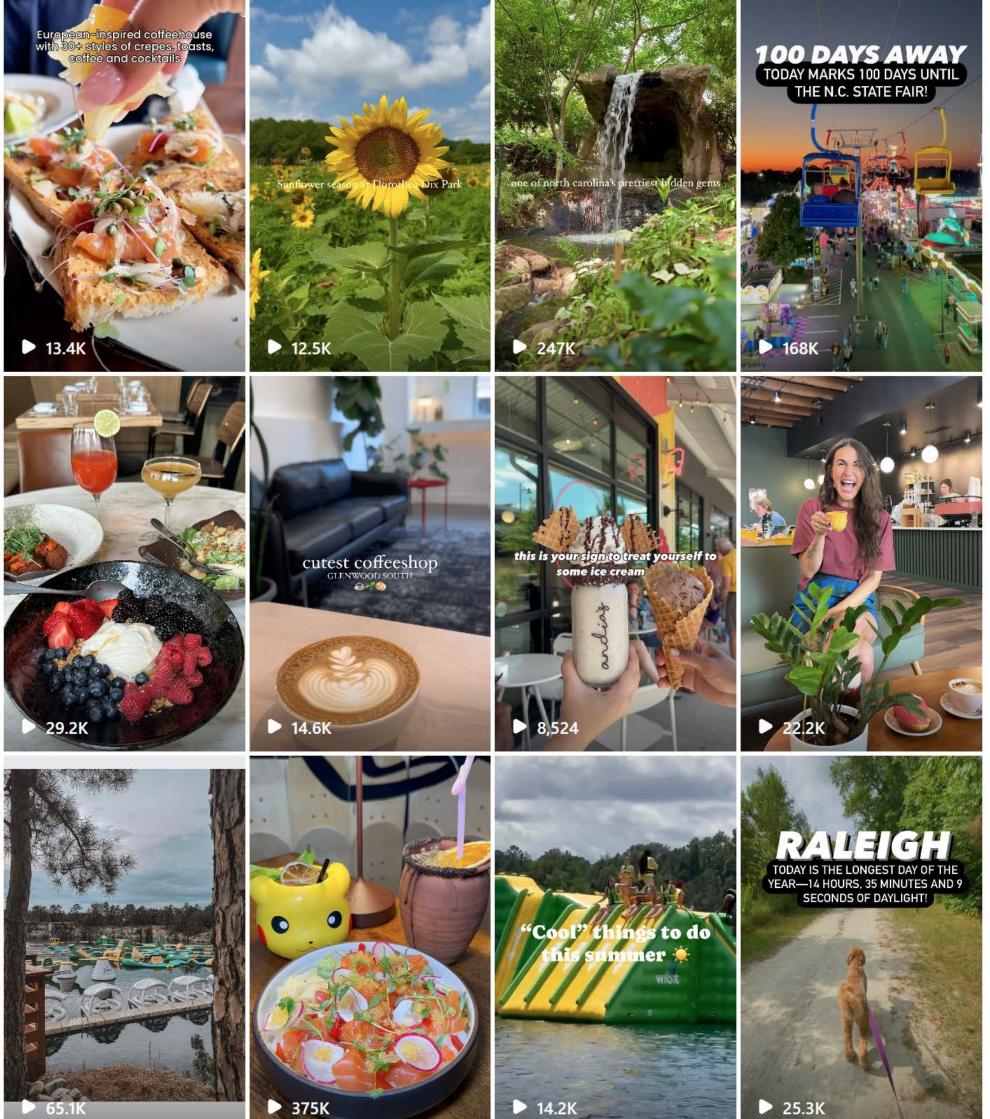




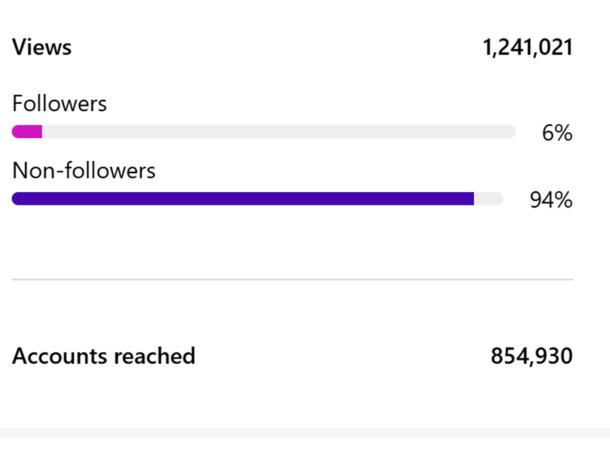












Interactions ①

Q Comments

□ Saves

▽ Shares

Interactions	100,349
Followers Non-followers	4.6% 95.4%
Reels interactions	100,349
♡ Likes	60,134

218

7,346

32,651



Views	2,151,473
Followers	2.7%
Non-followers	97.3%
Accounts reached	1,750,597

Interactions ①

Reels interactions

Interactions	232,583
Followers	4.2%
Non-followers	95.8%

♡ Likes	110,792
Q Comments	393
□ Saves	36,205
▽ Shares	85,193

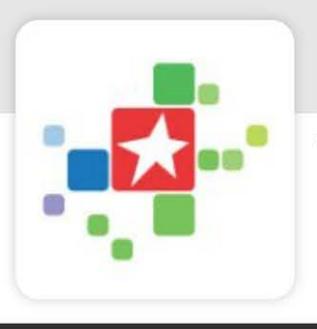
232,583

Social media is the latest link in this chain: a technology-driven, collective storytelling platform. Ninety-two percent of younger travelers in our survey say their last trip was motivated in some way by social media. Their major sources of social inspiration, however, aren't necessarily influencers or celebrities (30 percent) but rather friends and family (42 percent). Consumers' real-life social networks are filled with extremely effective microinfluencers.

¹Respondents could select multiple options. Source: McKinsey State of Travel Survey, Feb 27–Mar 11, 2024 (n = 5,061)

McKinsey & Company





visitRaleigh @visitraleigh





MEDIA UPLOADS 1,849

FOLLOWERS 88,934

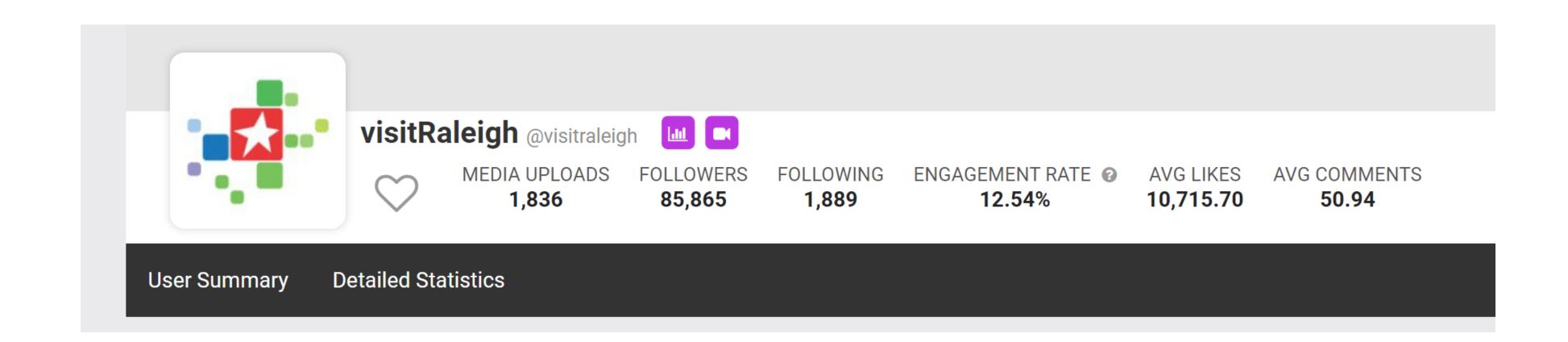
FOLLOWING 1,898

ENGAGEMENT RATE @ 7.26%

AVG LIKES 6,407.50

AVG COMMENTS

48.50





Visit Austin TX @visitaustintx





ENGAGEMENT RATE ②



Nashville Tennessee @visitmusiccity





ENGAGEMENT RATE ② **AVG LIKES**



MEDIA UPLOADS 1,923

FOLLOWERS 167,936

FOLLOWING 2,658

0.56%

AVG LIKES 920.75



MEDIA UPLOADS 7,968

FOLLOWERS 200,029

FOLLOWERS

98,143

350,467

FOLLOWING 2,201

0.22% 439.69



Boston.com @boston

FOLLOWERS MEDIA UPLOADS 6,027 481,797

FOLLOWING 4,386

AVG LIKES ENGAGEMENT RATE ② 0.74% 3,516.62



Visit New Orleans @visitneworleans

MEDIA UPLOADS **FOLLOWERS** 1,324 374,491

FOLLOWING 1,000

ENGAGEMENT RATE ② 0.65%

AVG LIKES 2,379.50



Charlotte @charlottesgotalot

MEDIA UPLOADS 2,631

FOLLOWERS 147,973

FOLLOWERS

112,818

FOLLOWING 1,649

ENGAGEMENT RATE ② 0.55%

AVG LIKES 810.13



Visit Richmond @visitrichmondva

MEDIA UPLOADS

2,786

243

FOLLOWING ENGAGEMENT RATE ②

AVG LIKES 605.63



Experience Columbus @experiencecolumbus



FOLLOWING 2,480

ENGAGEMENT RATE ② 0.62%

AVG LIKES 691.31

washington DC

Washington DC @visitwashingtondc

4,795

MEDIA UPLOADS FOLLOWERS



FOLLOWING

1,479

ENGAGEMENT RATE ②

0.55%

0.62%

AVG LIKES 1,916.50



Discover Durham @durhamnc

MEDIA UPLOADS

3,730



MEDIA UPLOADS 2,673 97,610 FOLLOWING 1,968

ENGAGEMENT RATE ? 0.72%

AVG LIKES 692.19

Visit Philly @visitphilly



FOLLOWERS 307,387

FOLLOWING 1,923

ENGAGEMENT RATE ② 0.40%

AVG LIKES 1,184.50



VISIT DENVER @visitdenver

MEDIA UPLOADS

3,025



FOLLOWERS

170,182

251,241







878

828

FOLLOWING

ENGAGEMENT RATE ② AVG LIKES 0.12% 198.56



VisitPITTSBURGH @visitpittsburgh

MEDIA UPLOADS

2,431





FOLLOWING

2,640

FOLLOWING

1,200

896

ENGAGEMENT RATE 2 AVG LIKES 1.35% 1,504.19



Visit Houston @visit_houston

MEDIA UPLOADS

3,278



FOLLOWING FOLLOWERS

ENGAGEMENT RATE ② AVG LIKES 0.71% 1,745.56



Destination Toronto @destination_toronto

MEDIA UPLOADS

3,127



ENGAGEMENT RATE ② **AVG LIKES** 0.40% 884.75



Visit Savannah @visitsavannah



MEDIA UPLOADS **FOLLOWERS** 5,165 187,969

FOLLOWING 656

AVG LIKES ENGAGEMENT RATE ② 0.87% 1,619.56

seattle

Visit Seattle @visitseattle

MEDIA UPLOADS

3,992



FOLLOWERS

112,794

FOLLOWERS

244,258

197,603

FOLLOWERS FOLLOWING

ENGAGEMENT RATE ② **AVG LIKES** 0.70% 1,367.88



NYC Tourism @nyctourism



MEDIA UPLOADS 7,571

FOLLOWERS 703,478

FOLLOWING 4,828

ENGAGEMENT RATE ② 0.22%

AVG LIKES 1,514.12



Discover Puerto Rico @discoverpuertorico





MEDIA UPLOADS FOLLOWERS **FOLLOWING**

324,997

835

ENGAGEMENT RATE ② 0.54%

AVG LIKES 1,677.31



Visit Orlando @visitorlando



MEDIA UPLOADS 4,393

FOLLOWERS 478,001

418

FOLLOWING ENGAGEMENT RATE ② 0.24%

AVG LIKES 1,100.62

New Zealand @purenewzealand

2,452







MEDIA UPLOADS 1,798

FOLLOWERS 1,182,655

211

FOLLOWING ENGAGEMENT RATE ② 0.29%

AVG LIKES 3,378.50 2025 Trends
& Questions?

New hotels

Raleigh

Hyatt House Raleigh Seaboard Station

Morrisville

 TownePlace Suites Raleigh Durham Airport

Holly Springs

 Holiday Inn Express Holly Springs – Raleigh Area



Coming 500n

Opening Late 2024/2025:

- SpringHill Suites by Marriott Raleigh Garner
- Homewood Suites by Hilton Raleigh/Downtown
- Tempo by Hilton Raleigh Downtown
- The Oberlin Raleigh

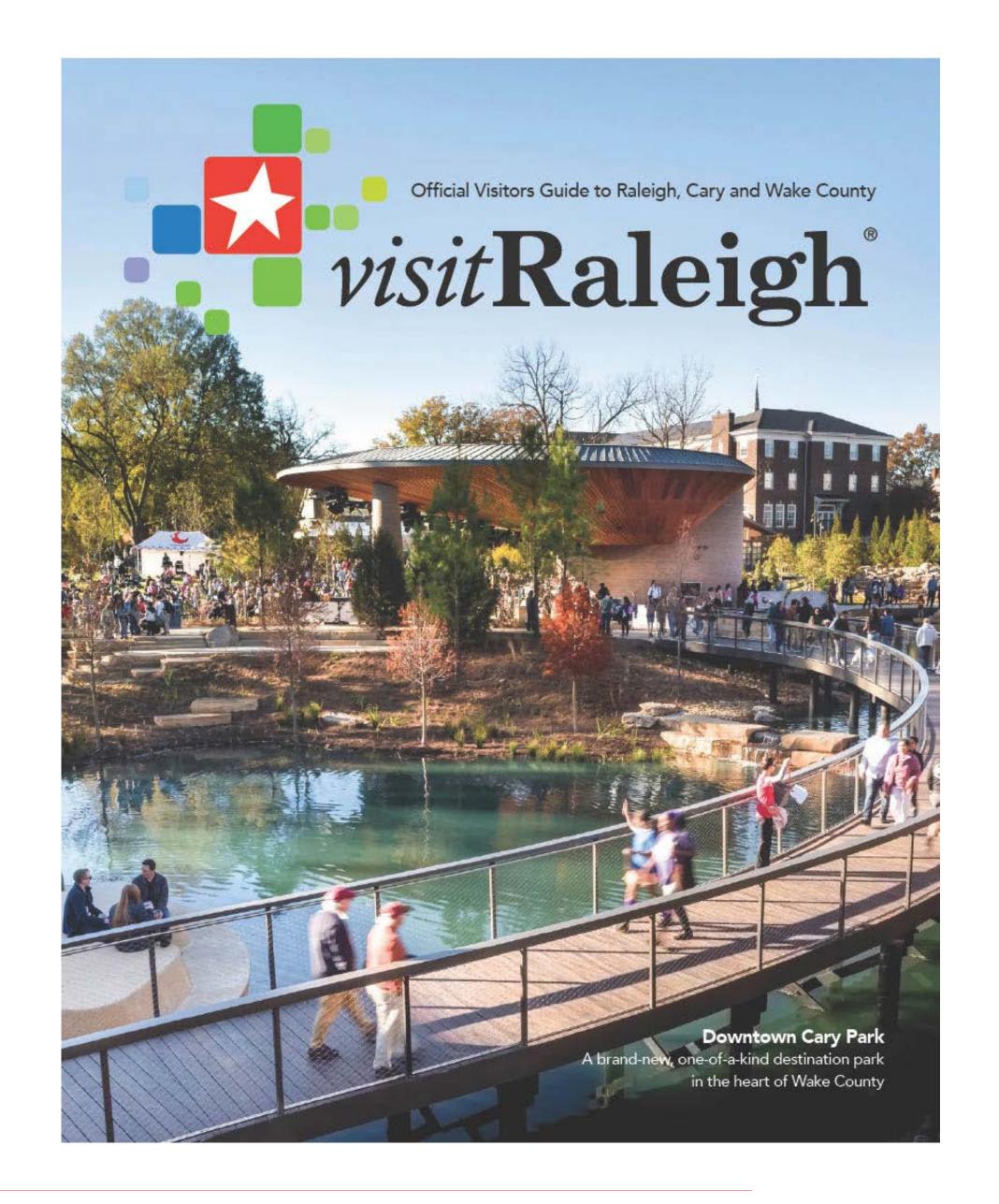


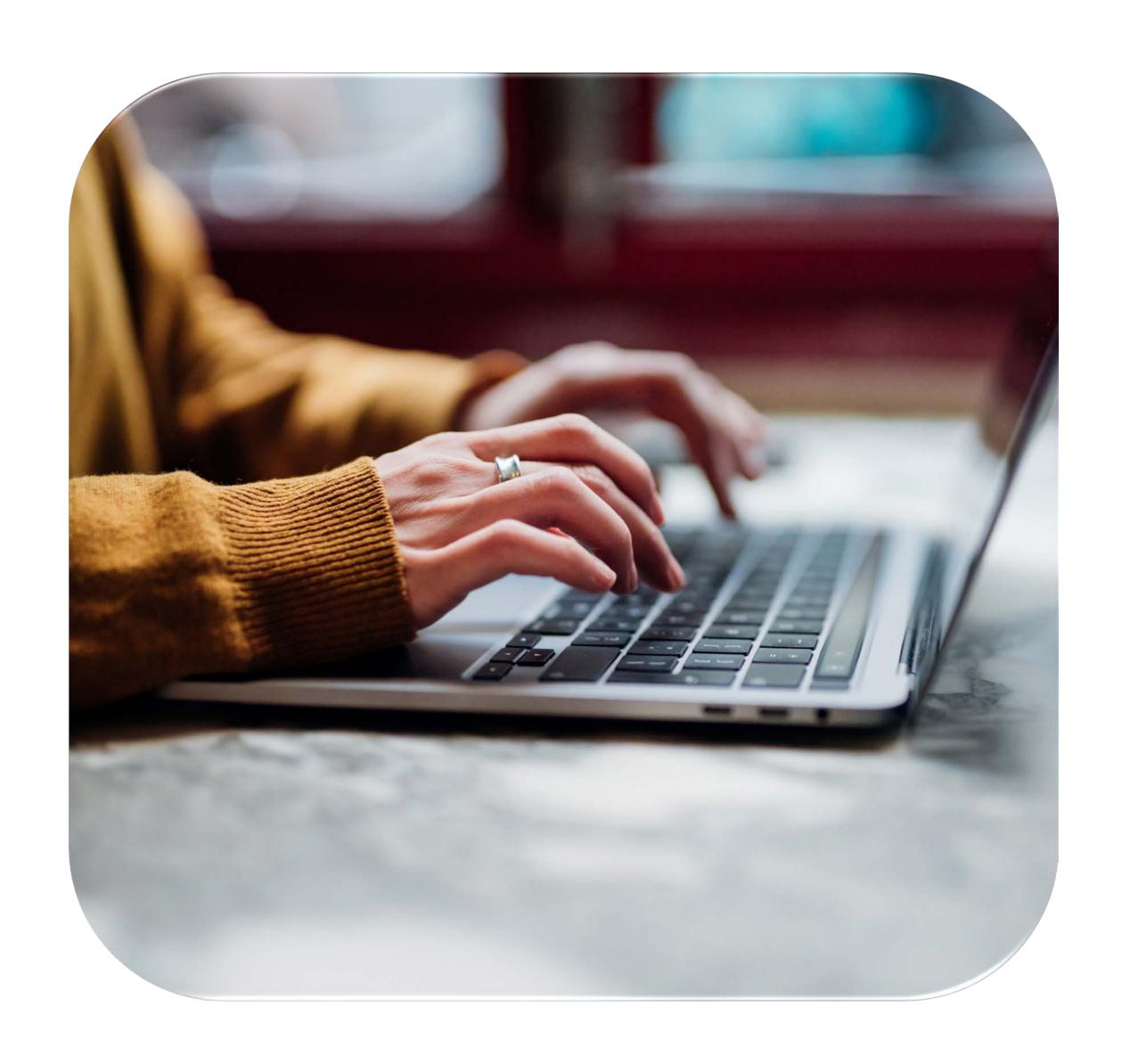
Thank you

Thank you to partners advertising in the 2025 Official Visitors Guide to Raleigh, Cary and Wake County.

80,000 copies of the guide will be distributed throughout the year, with 20,000+ being shipped out in Feb. 2025.

Access to the digital version will be available in Feb. 2025 at www.raleighvisitorsguide.com.





Partner survey

GRCVB Partner Marketing Survey

Help us better plan our marketing initiatives for 2025-2026.

Geared towards accommodations, events, attractions, restaurants, chambers/alliance membership groups.

Look for it in your inbox later this month.

See Raleigh Convention Center Expansion Plans

Learn about the plans and share thoughts on three exterior design options.

Afternoon and Evening Sessions November 7 2 p.m. - 3 p.m. and 6 p.m. - 7 p.m.

Raleigh Convention Center | Exhibit Hall A









Winter Tourism Talk Live Feb. 2025 • High Rail at Hyatt House Raleigh Seaboard Station

Spring Tourism Talk Live May 2025 • Location TBA

If you are interested in hosting a future Tourism Talk Live, email abaker@visitRaleigh.com

Special thanks Tri GQIf Ofirst tee triangle

