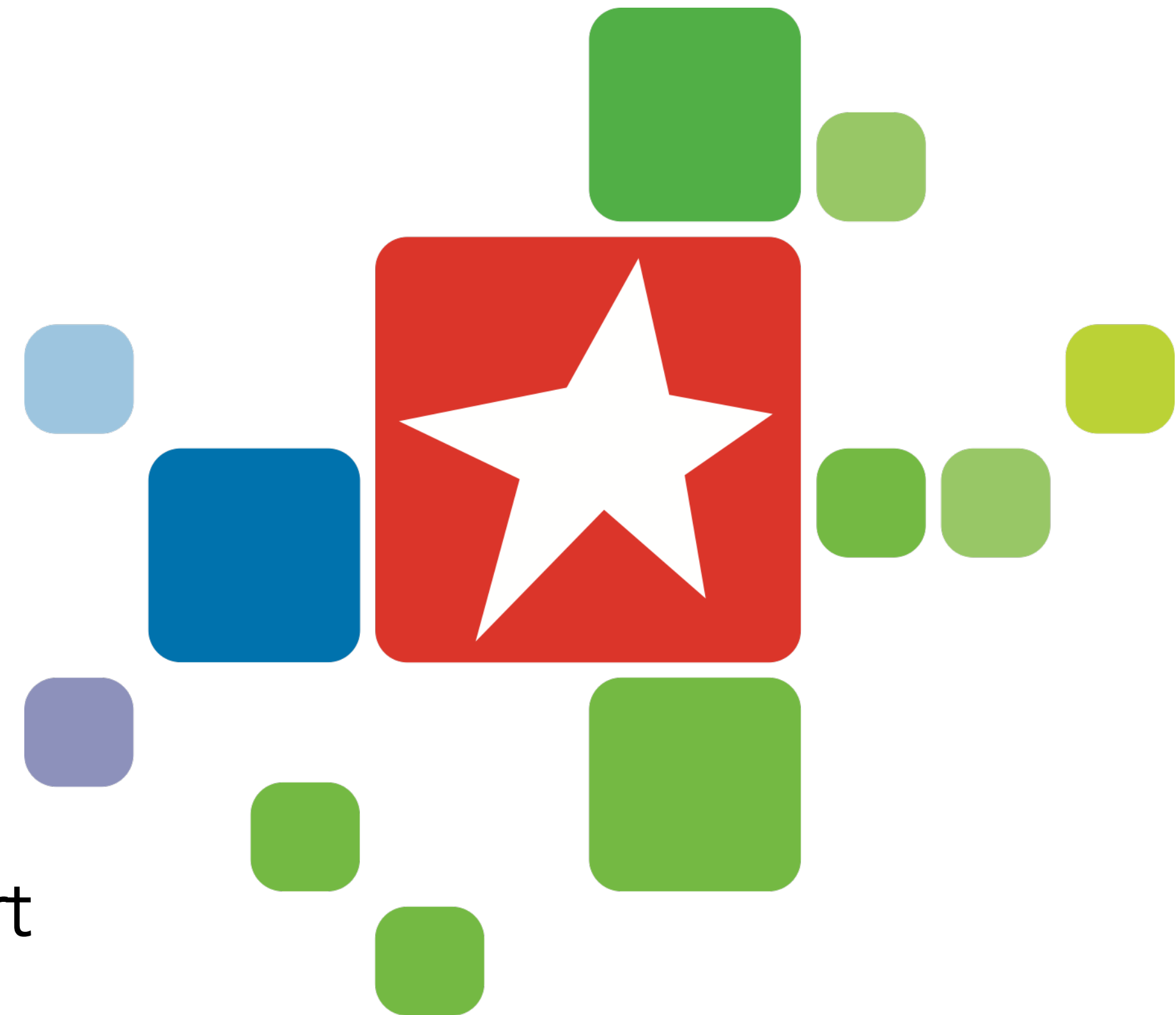




# *Welcome!*

## to Tourism Talk Live!

The Westin Raleigh-Durham Airport  
Wed., Nov. 9, 2023 • 10am





*Welcome!*

# The Westin Raleigh-Durham Airport





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# GRCVB "LEISURE TOURISM" ADVERTISING

July 2022 – June 2023





An aerial photograph of a city skyline at sunset. The sky is filled with vibrant orange and yellow clouds. In the foreground, there's a large, modern building with a flat roof and a parking lot. In the background, several tall skyscrapers are visible, including one with a distinctive pointed top. A construction crane is also visible in the distance. The overall scene is a mix of urban architecture and natural beauty.

# SITUATION

## APPROACH

## RESULTS

## WHAT'S NEXT






✓ CONTINUE "JUMP IN"

✓ PREPARE FOR NEW CAMPAIGN

✓ DIGITAL TEST AND LEARN



A photograph of a wooden boardwalk with railings leading through a forest. The ground is covered with fallen brown leaves. The trees on either side have green and yellow foliage, suggesting an autumn setting. The sky is visible through the trees, showing some clouds.

SITUATION

APPROACH

RESULTS

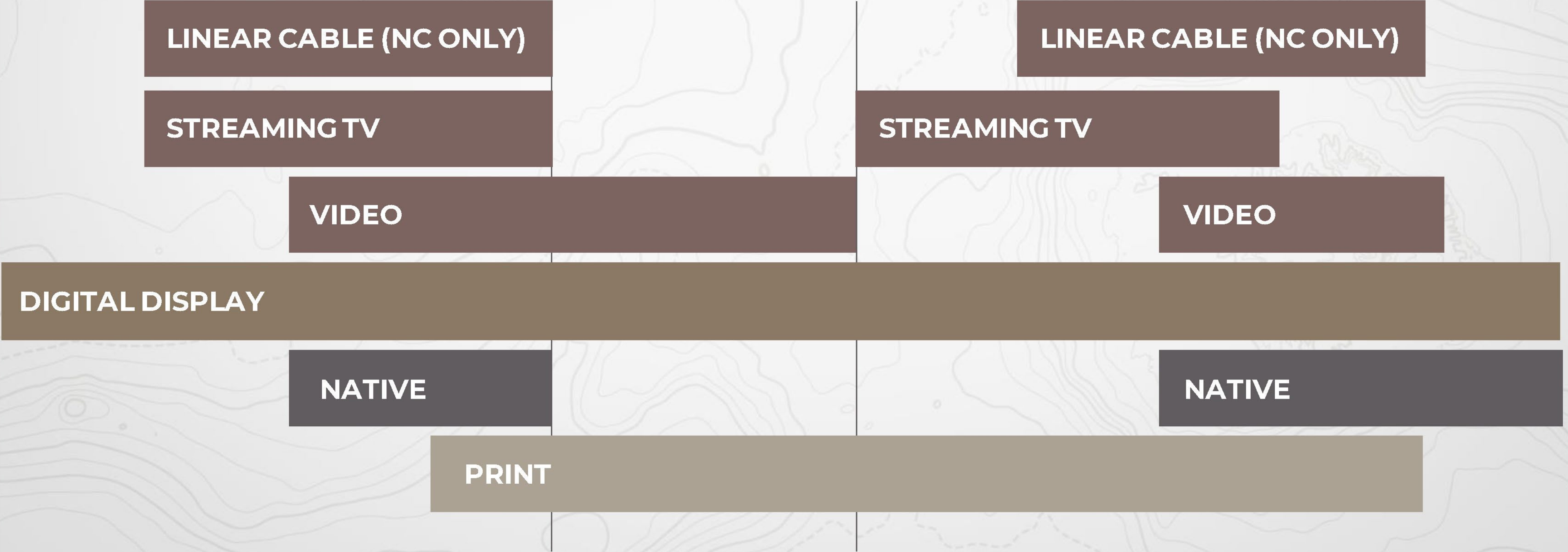
WHAT'S NEXT



# FY23 LEISURE APPROACH – MEDIA



NORTH CAROLINA, SOUTH CAROLINA AND VIRGINIA



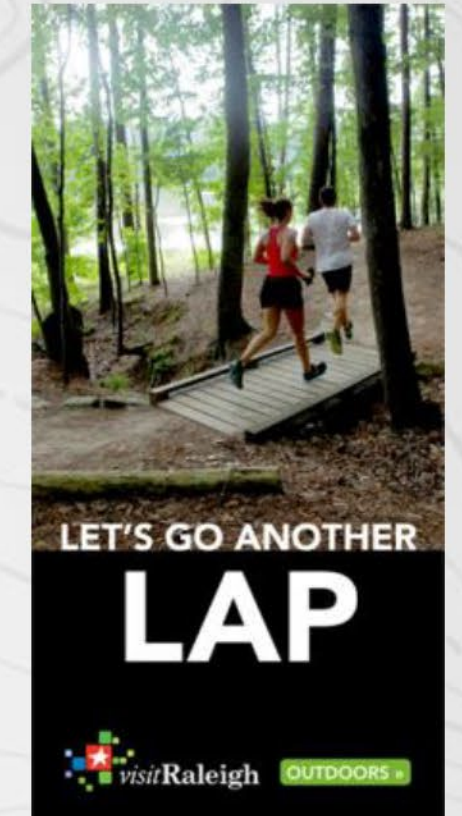
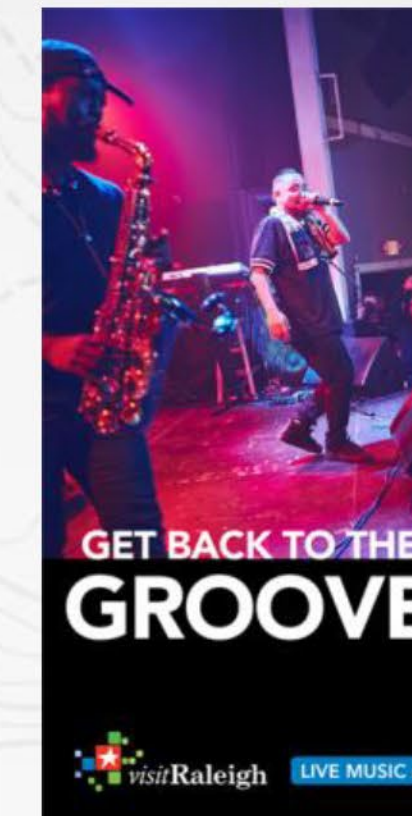


# LEISURE APPROACH – CREATIVE TRANSITION

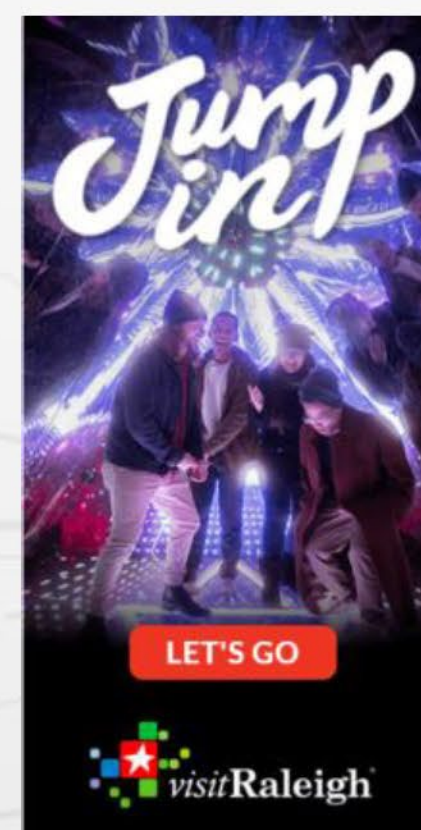
## PRE-ROLL VIDEO



## DIGITAL DISPLAY TEST



## DIGITAL DISPLAY



## PRINT



- ✓ acknowledge return visitors
- ✓ minimize “Jump In” in favor of activity headlines
- ✓ link to specific landing pages



SITUATION

APPROACH

RESULTS

WHAT'S NEXT





# FY23 CAMPAIGN HIGHLIGHTS | LEISURE

**36,000,000**

IMPRESSIONS

**361K**

INDIRECT  
SITE VISITS

**47K**

DIRECT  
SITE VISITS

ADDED  
VALUE  
WORTH

**35%**

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.



# LEISURE - FY23 RESULTS - SPECTRUM



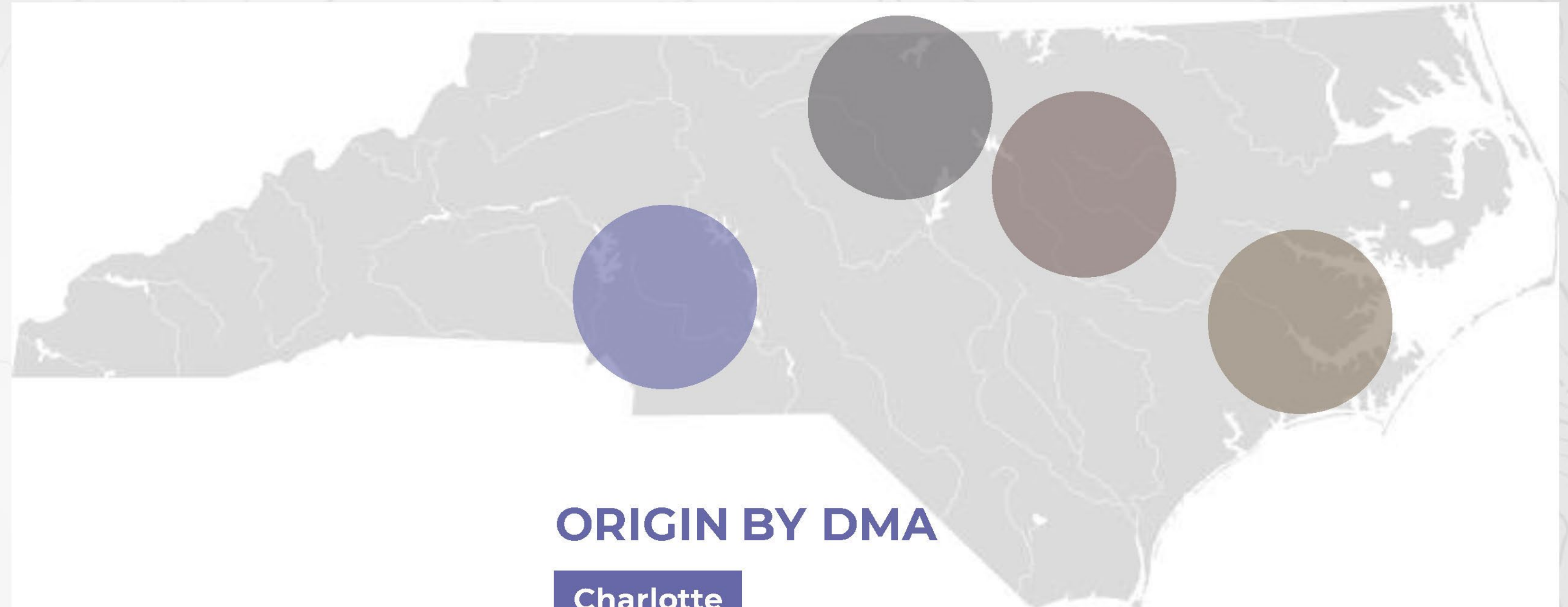
- Website traffic is vital to the overall effort; however, we strive to connect in-market spending to advertising investment whenever possible.
- Spectrum is one of the media partners we have been working with for a couple of years and they are able to provide economic impact directly related to their advertising campaign.
- The Spectrum Cable and Streaming TV spend drove more than **\$34 million** in measured visitor spending as of Sept 2023 (90-day lag window from when campaign ended in June).
- The majority of the spend was with Streaming TV but 3% of the spend was Linear cable to reach an additional 30% of consumers.



# TOP MARKETS

Visitors from Charlotte, NC account for 25% of hotel bookings.

69% of all bookings originated from DMAs within North Carolina.



## ORIGIN BY DMA

Charlotte

Raleigh-Durham

Greensboro

Greenville-New Bern-Washington



# 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 \$162.

75% of these guests stayed in Raleigh, 11% in Cary, 8% in Morrisville and others in neighboring towns.

## TOP HOTEL VARIABLES BY CITY BOOKED

City	% of Bookings	Avg. Length of Stay	Avg. Advance Purchase	Avg. Daily Rate
Raleigh	75.34%	1.61	7.79	\$170.53
Cary	10.95%	1.94	8.71	\$139.29
Morrisville	7.70%	1.29	6.76	\$127.45
Garner	1.95%	1.50	5.00	\$134.69
Apex	1.70%	2.68	6.21	\$149.23
Wake Forest	1.70%	1.18	4.06	\$138.15
Fuquay-Varina	0.41%	1.40	4.60	\$126.40
Holly Springs	0.16%	1.00	12.50	\$114.50
Zebulon	0.08%	4.00	14.00	\$126.00



# RESEARCH APPROACHES



## SPECTRUM DATA

Rich data partnerships  
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## EPSILON DATA

Credit card insights provide geographic location,  
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# LEISURE - FY23 RESULTS - EPSILON



- Epsilon is another partner that provides economic impact data in the form of credit card transactions.
- The Epsilon spend drove more than **\$19 million** in measured visitor spend as of June 2023. Final report is still pending.

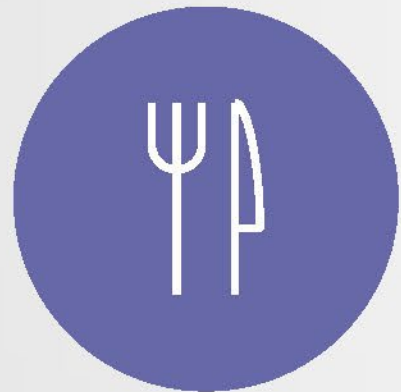


# EPSILON – LIST OF CATEGORIES



## LODGING

Hotels, Motels, Inns, Vacation Rentals



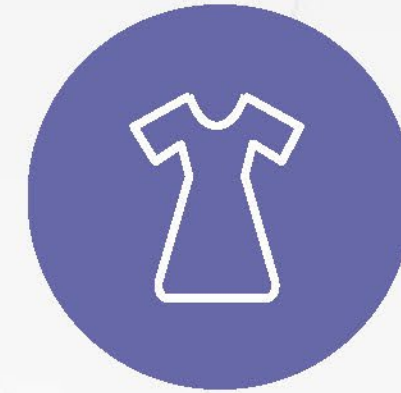
## RESTAURANT & BAR

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 4, 2022 – June 30, 2023



**\$19.4M**

total messaged  
visitor spend

Spend in destination zips from  
visitors who received an ad

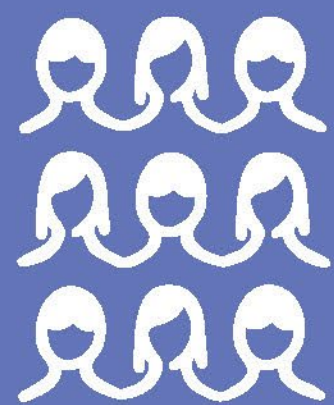
**\$100K**

investment  
Campaign spend

**\$194:1**

ROAS

Return on ad spend. Every dollar of invest-  
ment resulted in X dollars of visitor spend



**902K**

unique individuals  
reached

Number of individual people messaged  
with a campaign ad

**83.2K**

total visitors

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

**9.2%**

messaged traveler rate

Total visitors/unique individuals reached



**333K**

total transactions

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

**4**

average purchases  
per visitor

Total transactions/total visitors

**\$233**

average messaged  
yield per visitor

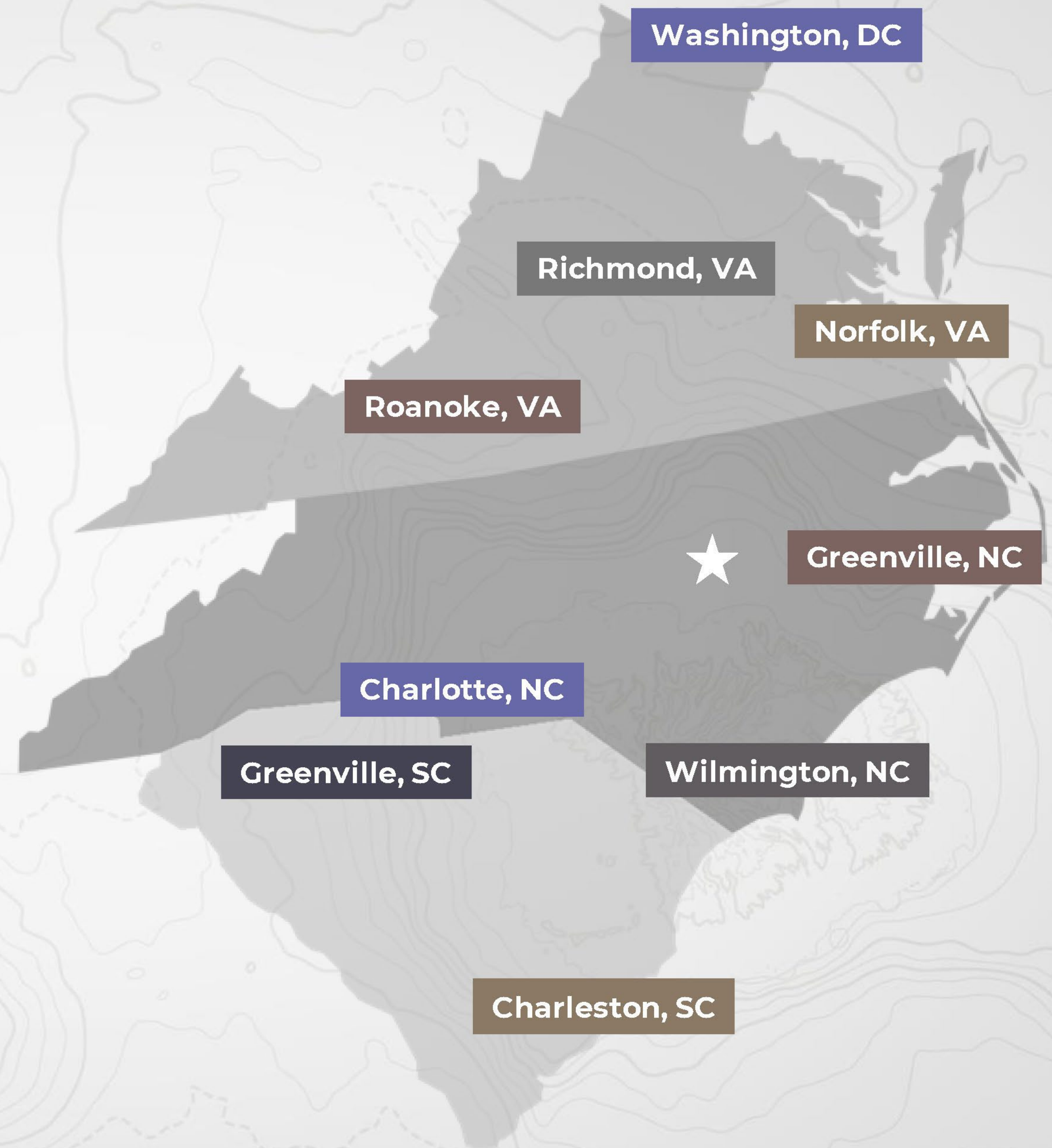
Total messaged visitor spend/total visitors

Note: NEI measures on average about 60% of non-cash transactions



## TOP MARKETS

32% of measured visitor spend generated in Wake County came from the Charlotte DMA—that measured spend was driven by 43% of visitors.





# VISITATION AND SPEND BY AREA

Area	Visitor Spend	Visitors	% Total Visitor Spend	Yield Per Visitor
North Hills	\$2,384,006	7,075	10%	\$337
Capital Blvd Corridor	\$1,458,619	3,997	6%	\$364
Crabtree Valley Area	\$1,453,837	5,042	6%	\$288
Cary	\$1,262,543	4,950	5%	\$255
Wake Forest	\$1,186,025	3,214	5%	\$369
Apex	\$1,109,507	5,771	5%	\$192
Downtown Raleigh, South Raleigh	\$980,384	3,830	4%	\$256
RDU Airport & Hotels, Morrisville	\$939,734	3,902	4%	\$241
Fayetteville Street, Convention Campus	\$922,995	4,518	4%	\$204
Cary	\$899,083	8,102	4%	\$111





SITUATION

APPROACH

RESULTS

WHAT'S NEXT



# FISCAL YEAR 2023

## 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 2024

## IMPLICATIONS

- Prioritize North Carolina markets but continue to increase spend in adjacent states.
- Test support in Atlanta with both digital tactics and streaming TV.
- Continue streaming TV in NC, SC and VA.
- Add Linear Cable in SC and continue in NC.



# Jonathan Freeze,

CDME, EDP

**Vice President of Marketing and  
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# Destination Brand *Definition*

The internalized sum of **all** impressions received by guests, influencers and stakeholders resulting in a distinctive position in **their** minds' eye based on perceived emotional and functional benefits.

(Knapp, *Global Destination BrandScience*)





# Destination Brand *Strategy*

**Strategy** is spearheaded by the CVB, on behalf of everyone here, to shape the destination brand long-term with our joint customers.

**Area hospitality partners** are key in delivering the strategy.





# Layers of Brand Strategy



North Carolina Museum of Art



guest  
house  
RALEIGH



Raleigh  
Convention  
Center



ARTS/ENTERTAINMENT  
MESSAGING

BUSINESS AND PRODUCT BRANDS

SERVICES AND  
INFRASTRUCTURE

BID/  
AREA

DESTINATION BRAND

MORE PLACE  
BRANDS



# Three Goals of Destination

## Branding

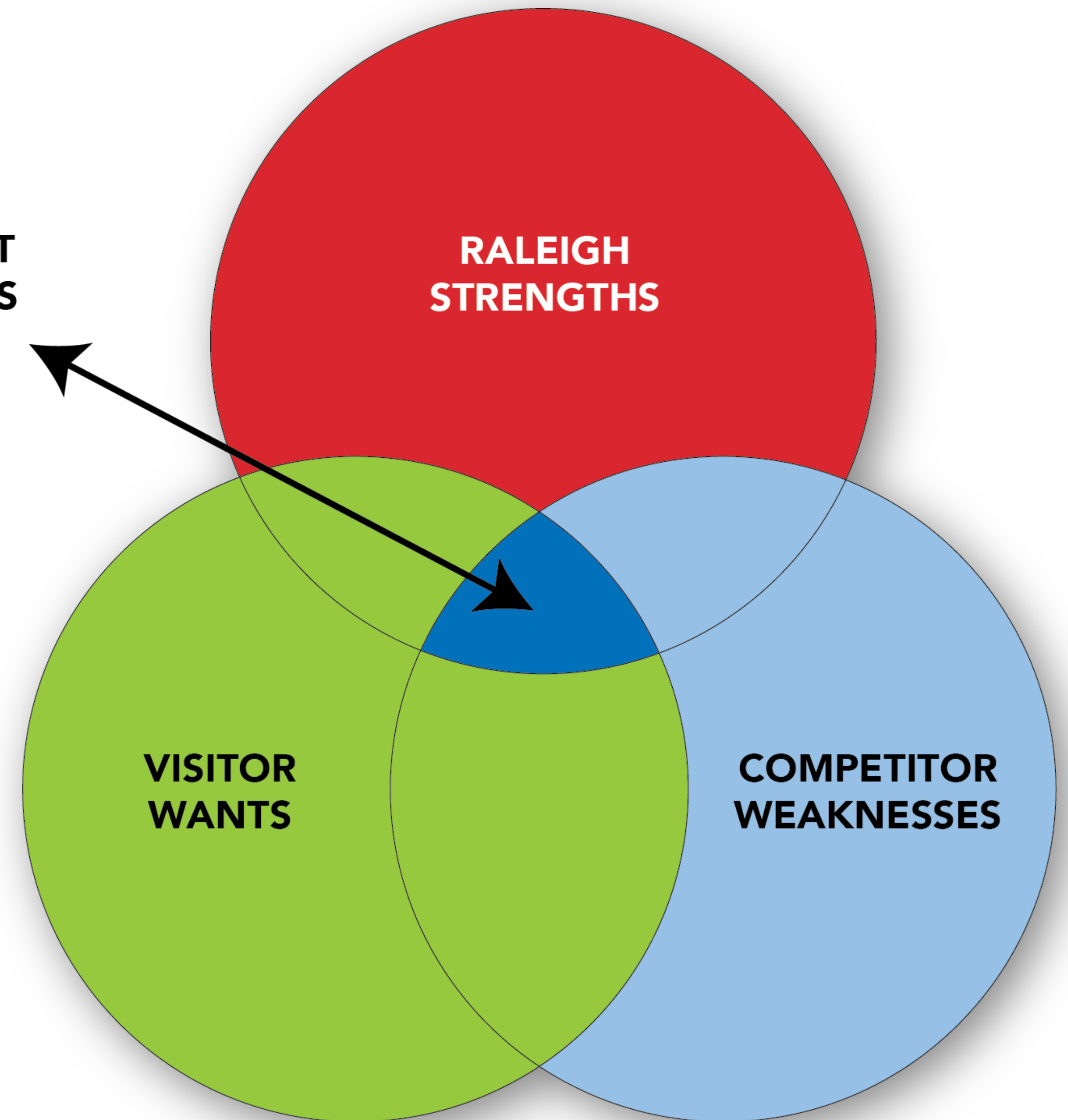
- Generating **new** visits/**repeat** customers...
- Building **preference** for visiting Raleigh/Wake County and creating **loyalty** for the destination...
- Expanding **revenues** (sales and taxes)...





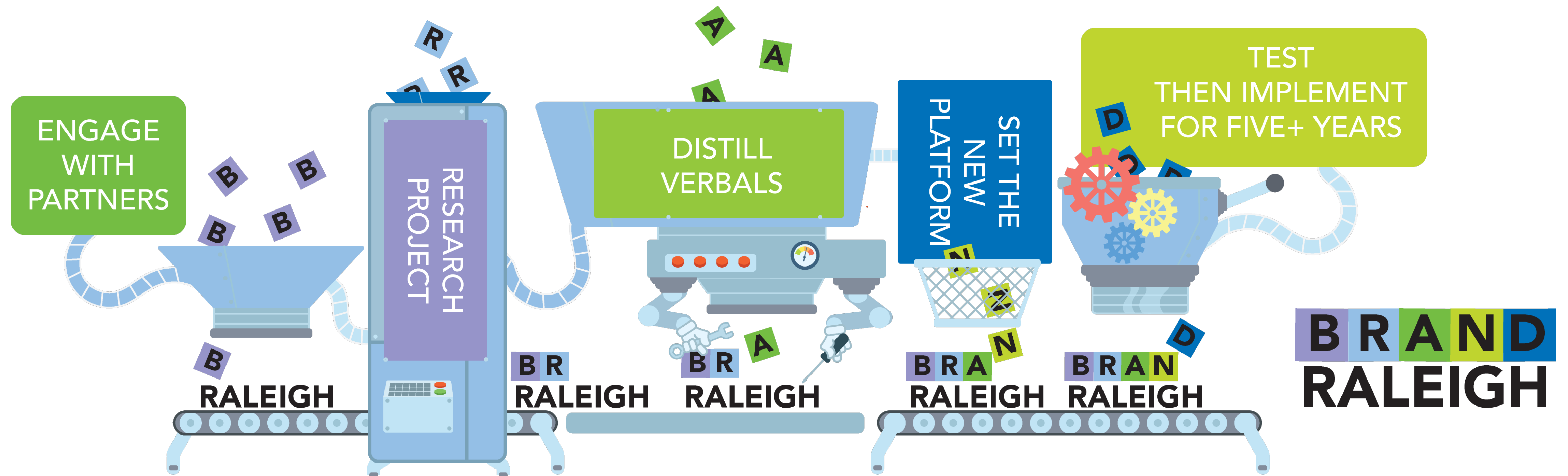
# Reassessment Involves Image *Research*

RESIDENT  
OPINIONS





# Reassessment Process and Timeline





# Future Meetings

## **Winter Tourism Talk Live**

Thurs., Feb. 8, 2024 • The Ritz

## **Spring Tourism Talk Live**

If you are interested in hosting a future  
Tourism Talk Live, email [abaker@visitRaleigh.com](mailto:abaker@visitRaleigh.com)



# *Special Thanks*



**The Westin Raleigh-Durham Airport**



**Scott Brown Media Group, Inc.**  
**[sbmg.com](http://sbmg.com)**



