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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✓ CONTINUE "JUMP IN"
✓ PREPARE FOR NEW CAMPAIGN
✓ DIGITAL TEST AND LEARN
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
FY23 Campaign Highlights | Leisure

36,000,000 Impressions

361K Indirect Site Visits

47K Direct Site Visits

Added Value Worth

35%

Bonus Impressions and Research
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.
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.

Source: Analysis of Adara Attribution Report of SR Campaign Visit Raleigh 09-01-2022 to 05-28-2023 + 30 day attribution window
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.
RESEARCH APPROACHES

SPECTRUM DATA

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EPSILON DATA

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

**RETAIL**  
Big Box, Local Retail, Specialty Stores

**RESTAURANT & BAR**  
Restaurants, Bars, Food Halls

**GAS & CONVENIENCE**  
Gas Stations & Convenience Stores

**GROCERY**  
Grocery Stores & Specialty Markets

**RECREATION & ENTERTAINMENT**  
Attractions, Museums, Vehicle Rentals, Cruise & Tours, Golf, Fishing, Sports Events, etc.
Tourism Talk Live • Greater Raleigh Convention and Visitors Bureau

**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 investment 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

<table>
<thead>
<tr>
<th>Area</th>
<th>Visitor Spend</th>
<th>Visitors</th>
<th>% Total Visitor Spend</th>
<th>Yield Per Visitor</th>
</tr>
</thead>
<tbody>
<tr>
<td>North Hills</td>
<td>$2,384,006</td>
<td>7,075</td>
<td>10%</td>
<td>$337</td>
</tr>
<tr>
<td>Capital Blvd Corridor</td>
<td>$1,458,619</td>
<td>3,997</td>
<td>6%</td>
<td>$364</td>
</tr>
<tr>
<td>Crabtree Valley Area</td>
<td>$1,453,837</td>
<td>5,042</td>
<td>6%</td>
<td>$288</td>
</tr>
<tr>
<td>Cary</td>
<td>$1,262,543</td>
<td>4,950</td>
<td>5%</td>
<td>$255</td>
</tr>
<tr>
<td>Wake Forest</td>
<td>$1,186,025</td>
<td>3,214</td>
<td>5%</td>
<td>$369</td>
</tr>
<tr>
<td>Apex</td>
<td>$1,109,507</td>
<td>5,771</td>
<td>5%</td>
<td>$192</td>
</tr>
<tr>
<td>Downtown Raleigh, South Raleigh</td>
<td>$980,384</td>
<td>3,830</td>
<td>4%</td>
<td>$256</td>
</tr>
<tr>
<td>RDU Airport &amp; Hotels, Morrisville</td>
<td>$939,734</td>
<td>3,902</td>
<td>4%</td>
<td>$241</td>
</tr>
<tr>
<td>Fayetteville Street, Convention Campus</td>
<td>$922,995</td>
<td>4,518</td>
<td>4%</td>
<td>$204</td>
</tr>
<tr>
<td>Cary</td>
<td>$899,083</td>
<td>8,102</td>
<td>4%</td>
<td>$111</td>
</tr>
</tbody>
</table>
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.
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CDME, EDP
Vice President of Marketing and Communications
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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 Brand Science)
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

- 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
- Raleigh Strengths
- Visitor Wants
- Competitor Weaknesses
Reassessment Process and Timeline

- Engage with Partners
- Research Project
- Distill Verbals
- Set the New Platform
- Brand Raleigh

Test then implement for five+ years
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
Special Thanks

The Westin Raleigh-Durham Airport

Scott Brown Media Group, Inc.
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