

Visit
WILLIAMSBURG
JAMESTOWN ▼ YORKTOWN

Williamsburg Tourism Council
Tuesday, November 19, 2019

Roll Call

Voting

Busch Gardens
Jamestown Rediscovery
Colonial Williamsburg
Hotel/Motel Association
Restaurant Association
Yorktown/Jamestown Found.
City of Williamsburg
James City County
York County

Kevin Lembke
James Horn *or designee
Kevin Crossett
Neal Chalkley, Vice Chair
Mickey Chohany
Phil Emerson *or designee
Doug Pons
Ruth Larson, Treasurer
Jeff Wassmer, Chair

Ex Officio

GWCTA
Virginia Tourism Corporation

Cheri Green
Rita McClenny

Public Comment

Limit to 3 Minutes

State Name and Address

No Q & A

Approve Minutes

October 19, 2019

Treasurer's Report

Revenue/Expenses

	Year to Date 9/30/2019		
	Actual	Budget	Variance
REVENUE			
SB942	\$ 7,829,586	\$ 5,246,336	\$ 2,583,250
\$1	\$ 1,068,351	\$ 854,054	\$ 214,297
Maint of Effort	\$ -	\$ 1,341,248	\$ (1,341,248)
Other	\$ 99,590	\$ 4,500	\$ 95,090
Total Revenue	\$ 8,997,528	\$ 7,446,138	\$ 1,551,390
EXPENSES			
Dest Marketing	\$ 6,724,469	\$ 7,549,635	\$ (825,166)
Other Sales & Marketing	\$ 325,686	\$ 463,705	\$ (138,019)
Labor & Benefits	\$ 657,739	\$ 872,624	\$ (214,885)
Admin	\$ 153,176	\$ 179,431	\$ (26,255)
Total Expenses	\$ 7,861,070	\$ 9,065,395	\$ (1,204,325)
2019 Rev over Expenditures by Month	\$ 1,136,458	\$ (1,619,257)	\$ 2,755,714

Treasurer's Report

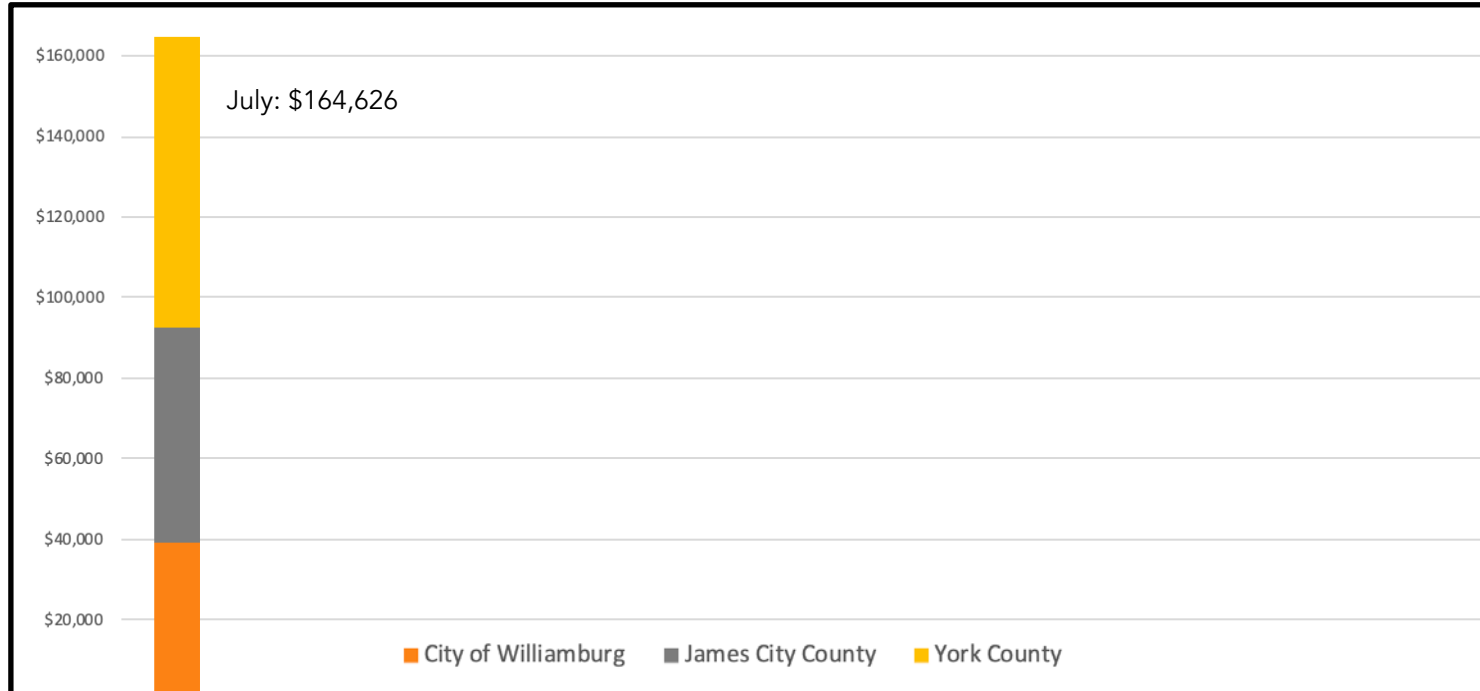
Cash on Hand

	Actual	Jul-19 Budget	Variance	Actual	Aug-19 Budget	Variance	Actual	Sep-19 Budget	Variance
State Disbursement	\$1,078,561	\$629,783	\$448,778	\$681,007	\$689,808	(\$8,801)	\$1,217,830	\$766,051	\$451,779
Maint of Effort	\$0	\$-	\$0	\$0	\$-	\$0	\$0	\$418,944	(\$418,944)
Bank Account Balances: operations									
BB&T Reserve Checking	\$250,306	\$250,000	\$306	\$250,306	\$250,000	\$306	\$250,296	\$250,000	\$296
BB&T ICS Investment Fund	\$503,308	\$506,271	\$(2,963)	\$504,042	\$507,531	\$(3,489)	\$504,762	\$508,794	\$(4,032)
Ches Bank Money Market	\$2,021,476	\$2,016,906	\$4,570	\$2,025,131	\$2,019,427	\$5,704	\$2,028,238	\$2,021,951	\$6,287
Ches Bank Checking	\$3,301,983	\$2,446,142	\$855,841	\$3,244,900	\$2,685,485	\$559,415	\$3,023,667	\$3,343,576	-\$319,909
Total Cash on Hand	\$6,077,073	\$5,219,318	\$857,755	\$6,024,379	\$5,462,444	\$561,935	\$5,806,963	\$6,124,321	(\$317,358)
Interest Earned:									
State Interest Paid	\$5,428	\$0	\$5,428	\$8,801	\$0	\$8,801	\$0	\$0	\$0
BB&T Reserve Checking	\$306	\$333	(\$27)	\$306	\$333	(\$27)	\$296	\$333	(\$37)
BB&T ICS Investment Fund	\$427	\$422	\$5	\$428	\$423	\$5	\$415	\$424	(\$9)
Ches Bank Money Market	\$3,428	\$2,516	\$912	\$3,655	\$2,519	\$1,136	\$3,107	\$2,522	\$585
Ches Bank Checking	\$1,267	\$1,223	\$44	\$1,515	\$1,343	\$172	\$1,387	\$1,672	-\$285
Total Interest Earned	\$10,856	\$4,494	\$934	\$14,705	\$4,618	\$1,286	\$5,205	\$4,951	\$254

Treasurer's Report

Transient Tax

*SOURCE: York County, Office of the Commissioner of Revenue

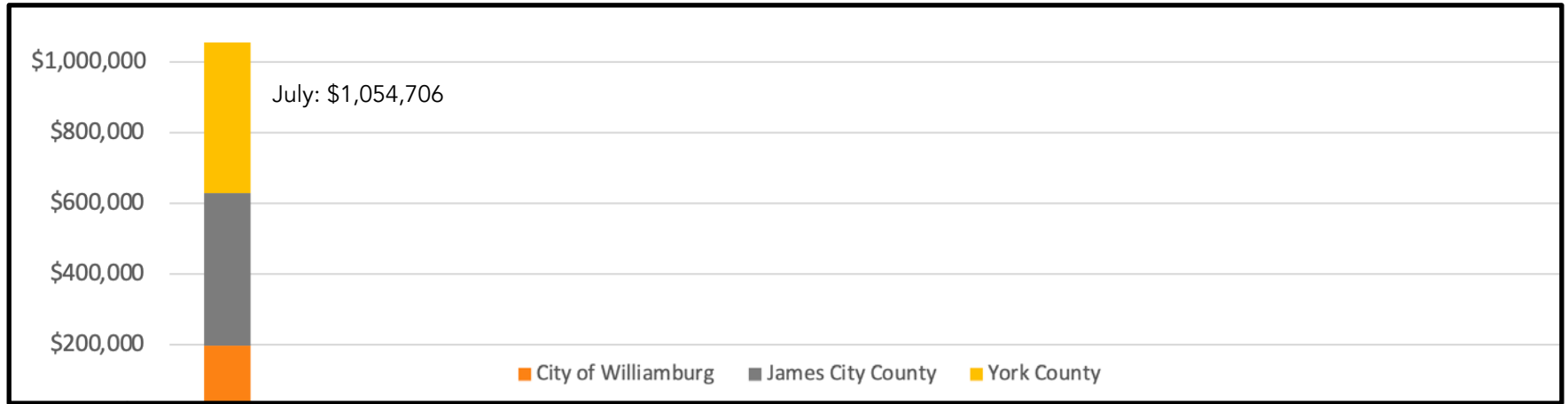


Transient Tax \$1 of the \$2													
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total
FY2020													
City of Williamsburg	\$39,210												\$39,210
James City County	\$53,578												\$53,578
York County	\$71,838												\$71,838
Total	\$164,626	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$164,626
FY2019													
City of Williamsburg	\$59,869	\$58,788	\$36,095	\$54,967	\$25,284	\$61,001	\$17,479	\$32,769	\$40,068	\$53,492	\$27,307	\$71,566	\$538,685
James City County	\$39,712	\$23,755	\$44,779	\$26,085	\$38,131	\$28,079	\$19,588	\$13,060	\$28,355	\$33,387	\$21,923	\$63,149	\$380,003
York County	\$66,598	\$66,181	\$41,914	\$47,656	\$45,768	\$52,214	\$28,784	\$28,946	\$46,806	\$57,331	\$53,537	\$60,611	\$596,346
Total	\$166,179	\$148,724	\$122,788	\$128,708	\$109,183	\$141,294	\$65,851	\$74,775	\$115,229	\$144,210	\$102,767	\$195,326	\$1,515,034

Treasurer's Report

SB 942 (1/2 of 1%)

*SOURCE: York County, Office of the Commissioner of Revenue



SB942 1/2 of 1%													
FY2020	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total
City of Williamsburg	\$197,252												\$197,252
James City County	\$429,912												\$429,912
York County	\$427,542												\$427,542
Total	\$1,054,706	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$1,054,706
FY2019	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total
City of Williamsburg	\$83,427	\$291,808	\$166,484	\$193,208	\$174,634	\$199,174	\$138,630	\$116,084	\$145,405	\$197,571	\$185,578	\$120,983	\$2,012,986
James City County	\$212,948	\$636,898	\$356,619	\$390,212	\$400,715	\$470,804	\$275,144	\$270,843	\$383,647	\$429,350	\$403,258	\$431,841	\$4,662,279
York County	\$241,914	\$558,126	\$355,033	\$348,249	\$363,300	\$402,173	\$309,296	\$278,496	\$353,895	\$366,127	\$386,567	\$178,524	\$4,141,700
Total	\$538,289	\$1,486,832	\$878,136	\$931,669	\$938,649	\$1,072,151	\$723,070	\$665,423	\$882,947	\$993,048	\$975,403	\$731,348	\$10,816,965

2020 Budget

Smith Travel Research Report

Current Month - September 2019 vs September 2018												
	Occ %		ADR		RevPAR		Percent Change from September 2018					
	2019	2018	2019	2018	2019	2018	Occ	ADR	RevPAR	Room Rev	Room Avail	Room Sold
United States	67.4	68.0	131.93	131.18	88.91	89.16	-0.9	0.6	-0.3	1.7	2.0	1.2
Virginia	65.5	63.2	115.38	111.84	75.61	70.72	3.6	3.2	6.9	7.5	0.6	4.2
Williamsburg, VA	44.5	42.3	108.05	110.10	48.07	46.62	5.1	-1.9	3.1	3.1	0.0	5.1

Year to Date - September 2019 vs September 2018												
	Occ %		ADR		RevPAR		Percent Change from YTD 2018					
	2019	2018	2019	2018	2019	2018	Occ	ADR	RevPAR	Room Rev	Room Avail	Room Sold
United States	67.6	67.6	131.92	130.58	89.18	88.27	0.0	1.0	1.0	3.0	2.0	2.0
Virginia	65.8	66.0	114.11	112.21	75.12	74.05	-0.2	1.7	1.4	1.8	0.3	0.1
Williamsburg, VA	50.8	50.2	124.83	122.01	63.37	61.28	1.1	2.3	3.4	2.3	-1.1	0.0

Director's Report

Welcome New Staff

Hiring

Procurement

Fall Photo/Video Shoot

Campaign Update

Future Meetings

New Partner Introduction:
SMARI/Dean Runyon



Welcome New Staff



David Turner
Finance Director



Julie O'Neil
Marketing Communications Director

Personnel/ Hiring



- Sales Director
- Marketing Comm Manager
- Public Information Officer



Requests for Proposals:

- Advertising Agency of Record
- Strategic Planning
- Brochure/Guidebook Distribution

Procurement

Ad Agency Timetable

Request for Proposals Issued	Wednesday, October 2, 2019
Deadline for Questions	Thursday, October 10, 2019
Responses to Questions	Wednesday, October 16, 2019
Written Proposal Deadline	Wednesday, October 30, 2019
Invitations to Present	Friday, November 8, 2019
Oral Presentations	Wednesday, November 20, 2019
Negotiation Process	November 21 – 27, 2019
Award Announcement	Monday, December 2, 2019

Key Deliverables:

- Strategic planning sessions with key stakeholders
- Creative Development
- Production
- Media Planning and Buying
- Digital

Fall Photo/Video Shoot



Fall Photo/Video Shoot



Fall Photo/Video Shoot



Fall Photo/Video Shoot



Campaign Update

Augmented Fall Direction:

- Target drive market, as well as NYC and Atlanta DMAs
- Demo to include:
 - Millennials, with and without children
 - Gen-X, with and without children
 - Active mature
 - Golf enthusiasts
- Digital media plan, with a focus on online travel partners
- Call to action must motivate transactions/bookings
- Paid media effort to be supported via pr and social

Holiday (Approved pre-Vicki):

- Target drive market
- Demo to include:
 - Millennials, with and without children
 - Gen-X, with and without children

Media

FLOWCHART – NOVEMBER - DECEMBER



Creative



GREATER
WILLIAMSBURG

HAS
FESTIVE
FUN

FOR
EVERYONE

SKATE *with your*
FAMILY

VISIT BUSCH GARDENS
CHRISTMAS TOWN

SHOP *at* CHRISTMAS
MARKETS

CHRISTMAS
in Williamsburg

Unwrap an
UNEXPECTED ADVENTURE

Plan Your Holiday

Adara Impact Plus

\$9M in hotel revenue generated from paid media September – mid-November

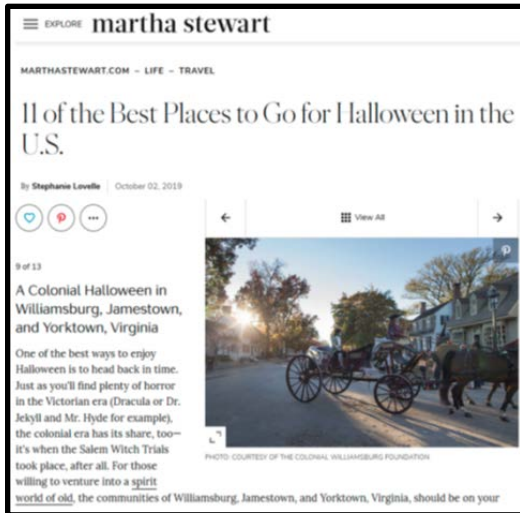
This represents 35.7K hotel bookings

Paid media influenced 6,761 flights into Williamsburg area airports

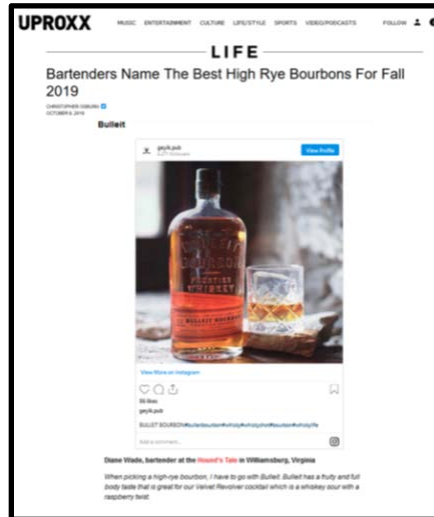
	SEP	OCT	NOV	TOTAL
Hotel Revenue	\$4,665,998	\$3,278,175	\$1,120,747	\$9,064,920
Hotel Bookings	19,327	12,152	4,295	35,774
Flight Bookings	2,873	903	2,985	6,761

Campaign Update – Media Relations

Secured Placements | Total Impressions: 252,100,861



Family Vacation Critic
Martha Stewart Living
Good Morning America
UPROXX



Reader's Digest
USA Today
The Washington Post
Wherever Family



The Epoch Times'
Traveling Boy
WVEC 13 News Now
Vacation Idea

Campaign Update – Media Relations

Group Press Trip: October 21-23, 2019

Garden & Gun

The Daily Beast

South Magazine

The Washington Post

USA Today 10Best

Traveling Boy

Boomer Magazine

Atlanta Journal Constitution/Dallas Morning News

Upcoming Media Familiarization Tours (FAMs)

- Rob Taylor – 2Travel Dad (November 1 – 3)
- Dennis Lennox, the Christian Post (November 16 – 20)
- Anne Marie Detavernier, Philadelphia Family (December 16 – 20)

Future Meetings

Typical Williamsburg Tourism Council Meeting Agenda Meeting Duration: One (1) Hour

Open Meeting	Roll Call
	Public Comment
	Approve Minutes
Treasurer's Report	Revenue & Expenses
	Cash on Hand
	Transient Tax
	SB 942
Executive Director's Report	Campaign(s) Updates/Overview
	Activities & Events
	Project Updates
Chairman's Report	Business of the Tourism Council
	Updates & Progress

Future Meeting Schedule/Anticipated Length

Meeting Date	Anticipated Agenda	Approximate Meeting Length
December 17, 2019	Typical Agenda	Ninety (90) Minutes
	Introduction to Ad Agency; Strategic Planning Partner	
January 21, 2019	Typical Agenda	Sixty (60) Minutes



WILLIAMSBURG
TOURISM COUNCIL

Research Overview

November 19, 2019

ABOUT STRATEGIC MARKETING & RESEARCH INSIGHTS (SMARInsights)



Our philosophy

We could profile our organization through an iteration of capabilities and past experience – and we do provide these for your reference. But that is not what we are about. At SMARInsights, we recognize that what is important is research be timely and meaningful and client-focused. Our focus is our clients and their needs, not our products and processes. This means we think and change and tailor what we do every day. And every day we give you our best.



Our history

SMARInsights has been conducting advertising evaluation research for tourism destinations for 30 years. SMARInsights' staff has worked with more than 25 state tourism organizations, more than 75 local convention and visitors bureaus, and almost 20 attractions.



Our mission is to provide each client with personalized consultation based on fully integrated marketing research services. We work with a variety of local, regional, national and international clients.

CURRENT CLIENTS



CURRENT CLIENTS



DiscoverSouthCarolina.com



RESEARCH PARTNERS

Dean Runyan Associates

- DRA's expertise will provide WTC with quarterly and annual travel reports focused on visitor spending, visitor volume and direct travel impacts and breakouts. They would also be SMARInsights' partner for forecasting.

Smith Travel Research

- STR collects comprehensive data in the lodging industry, allowing for reporting to the Williamsburg Tourism Council for Occupancy, ADR and RevPAR at a regional level.

DEAN RUNYAN ASSOCIATES

- Dean Runyan Associates offers services in economic and market research, specializing in market studies, project feasibility analysis, economic impact analysis and attractions planning and development. We have operated since 1984 and in that time have completed hundreds of travel and tourism economic studies.
- DRA is particularly experienced with helping states and regions analyze their travel and tourism industries. We have developed specialized data management and analysis methods for this work, and are one of only a few firms in the US that specialize in this type of research. Our approach is particularly appropriate for destination regions and states, relying to a large degree on local data sources that can be easily updated, documented and justified.
- DRA is currently preparing travel economic analyses projects for 12 state travel offices, including:

- | | |
|------------------------------|------------------------------|
| • Arizona (since 2004) | • Oklahoma (since 2009) |
| • California (since 1985) | • Oregon (since 1987) |
| • Colorado (since 1997) | • Texas (since 1997) |
| • Idaho (1997; 2015) | • Washington (since 1991) |
| • Nebraska (2012, 2016) | • West Virginia (since 2003) |
| • New Hampshire (since 2016) | • Wyoming (since 2001) |

DEAN RUNYAN ASSOCIATES

Our long history of serving many of our clients testifies to the reliability of our work and their satisfaction with our service.

In addition to statewide economic analysis projects, we have been retained by individual destination areas for this type of work, including DMOs and agencies in regions, counties and cities. Examples of locations where we have conducted travel research studies include:

- California (Lake Tahoe Basin, Napa, Sonoma, Kern, Humboldt and Monterey Counties, Irvine, Sacramento, Berkeley, Oceanside)
- New York (Finger Lakes Wine Country)
- Idaho (Sun Valley/Blaine County)
- Oregon (Portland metro area, Clackamas, Lane and Lincoln Counties, Lincoln City, Newport, Salem, Burns Piute Tribe)
- Texas (Austin, Fort Worth)
- Washington (North Olympic Peninsula, Bellingham/Whatcom, Pierce, Skagit and Snohomish Counties, the Makah Indian Reservation, Seattle and Spokane)
- Alaska (Juneau, Skagway)
- Nebraska (Lincoln, Madison and Platte Counties)

RESEARCH PROJECTS

RESEARCH OBJECTIVES

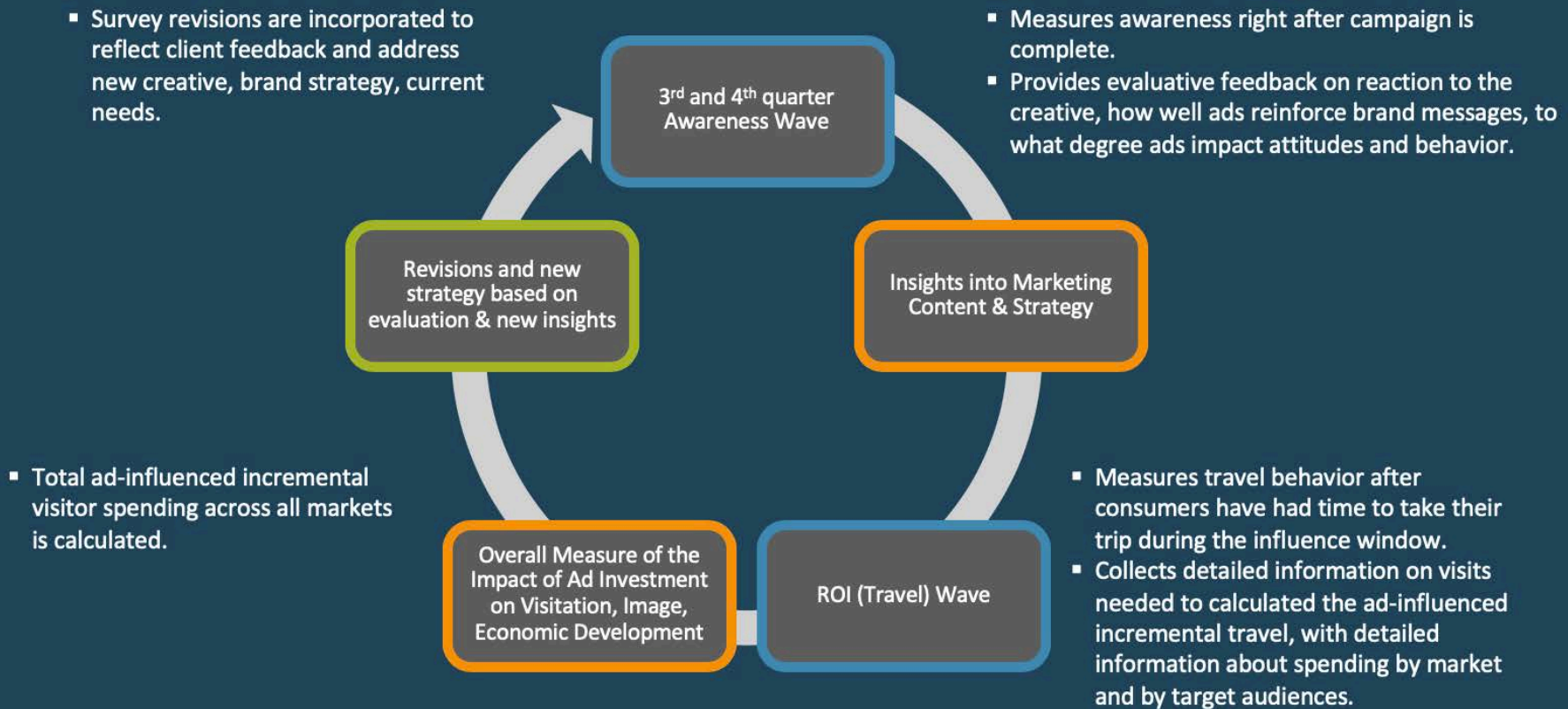
- Serve as WTC's key partner and research expert
- Demonstrate the industry's performance and economic impact
- Validate WTC's advertising effectiveness and Return on Investment
- Report lodging occupancy percentage, average daily rate (ADR), and revenue per available room (RevPAR)
- Communicate domestic and international travel trends and news
- Provide forecasting and trip growth
- Develop domestic travel profiles

RESEARCH PROJECTS

- **Advertising Effectiveness and Return on Investment Research**
- **Domestic Visitation and Travel Profiles**
- **Advertising Pre-Testing**
- **Brand Health Assessment**
- **Domestic and International Travel Trends and Forecasting**
- **Lodging Reports**
- **Seasonal Travel Impacts**

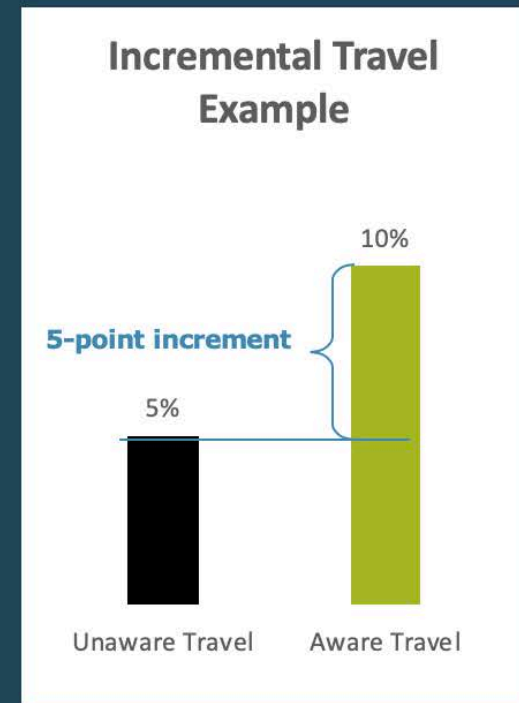
AD EFFECTIVENESS & ROI RESEARCH

AD EFFECTIVENESS + ROI RESEARCH: OVERVIEW



AD EFFECTIVENESS + ROI RESEARCH: ROI MEASURED THROUGH INCREMENTAL TRAVEL

- Measuring incremental travel is the key to producing a conservative measure of advertising impact. It is also the industry standard, used by most destinations that measure ROI.
- Consumers would obviously visit a destination regardless of advertising efforts. We do not count all ad-aware trips as influenced.
- Rather, the level of travel among those unaware of the advertising represents the travel that would have occurred with no advertising.
- **The additional level of travel observed among those aware of the advertising is considered influenced, or incremental.**
- This is a classic experiment approach in which a test case is compared to a control case. It is logical, universally applicable, easily understood, and defensible.



AD EFFECTIVENESS + ROI RESEARCH: PROCESS

THE FOLLOWING SLIDES PROVIDE AN EXAMPLE OF THE PROCESS & CALCULATIONS

- Qualified households are surveyed to determine rates of advertising recall, which lets us calculate ad-aware households



- Ad-aware households are multiplied by the rate of incremental travel.



- The total ad-influenced trips are multiplied by the average trip expenditure to get total ad-influenced visitor spending.



AD EFFECTIVENESS + ROI RESEARCH: PROCESS

- Visitor spending divided by the paid advertising budget equals the ROI.
Visitor spending at the tax rate divided by media spend equals the TAX ROI.

 \div  $=$ **ROI**

Ad-Influenced
Visitor Spending Media
Expenditures Return on
Investment

 \times  \div  $=$ **TAX
ROI**

Ad-Influenced
Visitor Spending Tax Rate Media
Expenditures General Fund (Tax)
Return on Investment

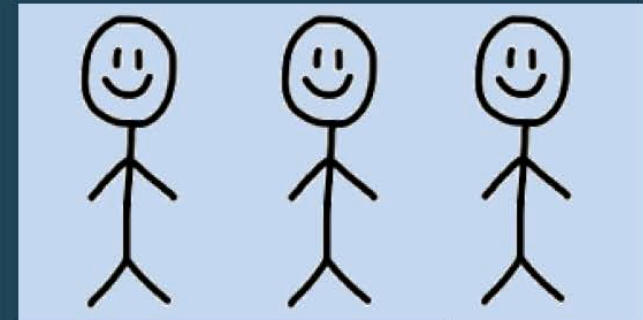
AD EFFECTIVENESS + ROI RESEARCH: THE ROI CALCULATION PROCESS

Qualified HHs	12.1M	Households typically travel together, so we use households rather than individuals as the basis for determining ad-influenced trips. Households are qualified based on leisure travel habits.
Ad Recall	48%	This is the measure of aided advertising recall (the percentage of respondents who recall seeing some element of the advertising campaign)
Ad-Aware HHs	5.8M	The qualified household base multiplied by the level of ad recall
Travel Increment (Ad-Influenced Travel)	3.3%	Incremental travel is determined by comparing the rate of travel between the ad-aware and unaware target households (reviewed on the previous page)
Incremental Trips (Ad-Influenced Trips)	192,420	The ad-aware households multiplied by the travel increment
Average Trip Expenditures	\$1,120	Average trip expenditures are gathered by asking trip spending by category in the survey (e.g., lodging, dining, transportation, recreation, etc.)
Ad-Influenced Visitor Spending	\$215.5M	Incremental trips multiplied by average trip expenditures
Media Expenditures	\$2.5M	The total advertising investment
ROI (Return on investment)	\$86	Ad-influenced visitor spending divided by the media expenditures. The advertising returned \$86 in visitor spending for each \$1 invested in the advertising.
Tax ROI	\$7.24	Ad-influenced visitors spending is multiplied by tax rate to generate Tax ROI. Tax rate from Economic Impact research is used to maintain comparability

SAMPLING

Markets	Market Quotas	Total
8 traditional markets	300	2,400
10 planned markets	150	1,500

- SMARInsights often uses more than one vendor to get a more representative sample. And with the targeting and quota requirements of this study, we propose that approach.
- We have developed a process to track the digital fingerprint of participants to identify duplicate respondents across sample vendors that includes device identification variables that are not controlled by the respondent. As a result the final sample will be free from duplicates in each measure.



DELIVERABLES

- Market perceptions
- Awareness of WTC advertising and awareness of Williamsburg as a travel destination
- Response to the advertising
- Evaluation of creative
- Overview of travel patterns among the target audience
- Measures of incremental travel generated by the campaign
- Measures of increased spending or revenue
- Evaluation of which elements of the campaign had the strongest impact on visitation and which geographic areas responded the best
- Measures of the ROI for incremental travel generated by the marketing campaign
- Comparisons against industry benchmarks
- Conclusions and recommendations regarding the marketing campaign and how to improve its effectiveness.

DOMESTIC VISITATION & TRAVEL PROFILES

DOMESTIC VISITATION & TRAVEL PROFILES OVERVIEW

- The ad effectiveness/ROI study just discussed will include capturing data from visitors about their trips. We are estimating based upon past research that over 15% of those interviewed will have visited Williamsburg or approximately 650 people.
- However, these visitors will only have come from the DMAs where WTC is conducting marketing efforts. To get a fully representative read on visitors, some broader geographic scope is required.
- Specifically, we will use geolocation data to obtain a granular review of origin markets across all DMAs to establish non-targeted geographic quotas in which to conduct an additional 350 surveys, which would then be weighted relative to visitation penetration of the geolocation data.
 - Number of trips and travelers to the destination annually
 - Total domestic market share of travel
 - Planning & booking – timing and behavior
 - Trip type
 - Travel party size
 - Mode of travel
 - Length of stay
 - Activities
 - Trip expenditures
 - Attractions
 - Demographics
 - Geographics

SAMPLING

- We conduct nearly 100,000 surveys nationwide annually with travelers asking about places visited and length of trip over the past year. We use a variety of sample vendors and conduct this through the year to measure travel incidence and develop data about share and volume. To assure representativeness, this data is weighted to DMA population.
- Additionally, we also will review geolocation data from non-resident mobile devices visiting the Historical Triangle in 2019.
- The volume and shared data from this database will be used to provide geographic weighting of completed interviews.
- A total of 1,000 completed surveys would be conducted from a variety of sample vendors targeted to the geographies that the database suggests. Distant, low incidence DMAs would be re-targeted from the database.

QUESTIONNAIRE

General topics to be addressed:

- Screener
- Visitation to Williamsburg
- Travel behavior information – changes made recently
- Details of trips to Williamsburg including:
 - Mode of transportation
 - Timing of trip
 - Planning behavior and sources of information
 - Motivations for choosing Williamsburg
 - Itinerary within Williamsburg
 - Travel party size
 - Duration of trip
 - Destination(s) in and around Williamsburg
 - Activities on trips
 - Accommodations
 - Detailed trip expenditure data, including lodging, meals, gifts and souvenirs, shopping, attractions, entertainment, transportation and miscellaneous expenses
 - Ratings of Williamsburg travel experience
 - Likelihood to re-visit
- Demographics

AD PRETESTING

- Our ad effectiveness and ROI assessments reliably and meaningfully evaluate the performance of campaigns. And in that context, we conduct ad evaluations using metrics that have been conducted with hundreds of tourism campaigns and for which we have benchmarks to provide comparative assessments.
- Ad and campaign evaluations can similarly be done prior to placement and/or production. Methodological approaches vary dependent upon the materials, the stage of product and the research objective. Qualitative focus groups can be used for concept evaluations, while quantitative methods can be implemented for more developed materials or for specific assessments of imagery, taglines and copy.

BRAND HEALTH

- Understanding the position and image of the destination over time is essential to maximizing the marketing message. And for Williamsburg this offers unique challenges given the strong connection with history, which traditionally has more niche appeal.
- The current focus upon *fun* would seem to be well targeted in light of this consideration. Understanding how that positions the brand over time is important to continue to grow and nurture image perceptions.
- To address these considerations, an image perception, or brand health research project, would be conducted.

TRAVEL TRENDS & FORECASTING

- As WTC's research partner, SMARInsights would provide monthly reports detailing industry news and trends, with more frequent communication on time-sensitive issues.

MONTHLY LODGING REPORTS

- Smith Travel Research (STR) is the leading global provider of competitive benchmarking, information services and research to the hotel industry. Their data reporting empowers hoteliers and destination marketing organizations to make sound decisions by providing actionable performance data.
- Data is collected from the hotels and/or hotel companies in the form of rooms available, rooms sold and rooms revenue. They then aggregate the raw data with other participating properties as to not isolate any one hotel property, brand or parent company's data to produce the calculated metrics of Occupancy, ADR and RevPAR.
- STR follows strict sufficiency guidelines to keep the hotel data safe and proprietary but at the same time provide complete and actionable data for the entire industry.

SEASONAL TRAVEL IMPACTS

Task 1. Refine Study Requirements and Prepare Methodology

Task 2. Gather and Analyze Lodging and Sales Tax Data

Task 3. Compile Camping Data

Task 4. Collect Other Travel and Economic Data

Task 5. Analyze Direct Impacts

Task 6. Analysis of Visitor Volume and Average Expenditures

Task 7. Interactive Dashboard

DATA SOURCES

- US Department of Commerce - Bureau of Economic Analysis , Census Bureau , International Trade Administration, National Travel & Tourism Office
- US Department of Energy - Energy Information Administration
- US Department of Labor - Bureau of Labor Statistics
- US Department of Transportation - Bureau of Transportation Statistics
- US Bureau of Economic Analysis (income, employment, earnings, personal current taxes and gross state product)
- US Bureau of Labor Statistics (quarterly census of employment)
- US Bureau of the Census (population, households, second homes, government finance; Economic Census county and metro level data)
- US Energy Information Administration (motor fuel prices and volume by state)
- US Department of Transportation Origin and Destination Survey (airfares and visitor arrivals by destination)
- US Bureau of Labor Statistics regional CPIs (food service, recreation, retail, other transportation)
- OmniTrak (travel profile, including expenditure and travel characteristics)

DASHBOARD AND TIMELINE

- Dashboard construction and collection of certain input data (e.g., room tax distributions, population estimates, camping data, etc.) can be started as soon as the contract is approved. Additional data required will be gathered as they become available, with estimated delivery of quarterly reports occurring 8-10 weeks after the end of each period. A draft 2020 annual report will be available by March 31, 2021, with a final version delivered following client review and feedback.

NEW HAMPSHIRE TRAVEL IMPACTS

Access data by clicking on county map, or switch tab for region or state map

Select County

Select Tourism Region

Select State



You now have direct access to travel impact data, as reported in the Economic Impact reports, prepared by Dean Runyan Associates for the New Hampshire Division of Travel and Tourism Development, Department of Resources and Economic Development. The Economic Impact Report includes direct economic impacts of travel to and through New Hampshire and its tourism regions and counties in the following categories:

Expenditures

Purchases by travelers during their trip, including lodging taxes and other applicable local and state taxes, paid by the traveler at the point of sale.

Earnings

The earnings (wage and salary disbursements, earned benefits and proprietor income) of employees and owners of businesses that are attributable to travel expenditures.

Employment

Employment associated with the above earnings; this includes both full- and part-time positions of wage and salary workers and proprietors.

Government Revenues

Tax receipts collected by state, counties and municipalities, as levied on applicable travel-related purchases, including lodging, food and beverage service, retail goods and motor fuel. Business or employee tax revenue includes state business and personal income taxes, local property taxes and the sales tax payments of travel industry employees.

Overnight Visitor Volume and Average Overnight Spending

Regional and statewide estimates of visitor volume and average spending (which includes both domestic and international visitation) for overnight visitors. In the case of trips, the sum of regions are greater than the statewide estimate.

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\(4 Seasons\)](#)

NEW HAMPSHIRE TRAVEL IMPACTS

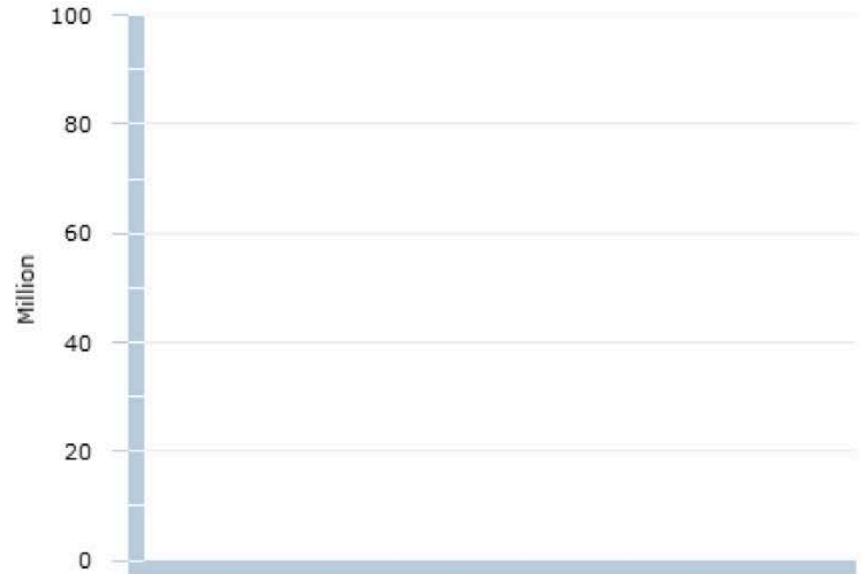
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You selected: **New Hampshire State**

[Change Selection](#)

- ▼ Travel Impacts
 - ▶ Total Direct Travel Spending
 - ▶ Visitor Direct Spending
 - ▶ Direct Earnings
 - ▶ Direct Employment
 - ▶ Total Direct Tax Receipts
 - ▶ Overnight Visitor Volume
 - ▶ Average Overnight Spending

Please make a selection on the left...
New Hampshire State



Annual Trend Seasonal Trend Single Period

Period:

Output:



NEW HAMPSHIRE TRAVEL IMPACTS

[View Definition of Terms](#)

You selected: **New Hampshire State**

[Change Selection](#)



- ▼ Travel Impacts
 - ▶ Total Direct Travel Spending
 - ▶ Visitor Direct Spending
 - ▶ Direct Earnings
 - ▶ Direct Employment
 - ▶ Total Direct Tax Receipts
 - ▼ Overnight Visitor Volume
 - ▶ Party Trips
 - ▶ Party Nights
 - ▶ Person Trips
 - ▶ Person Nights
 - ▶ Average Overnight Spending

Please make a selection on the left...
New Hampshire State



Annual Trend Seasonal Trend Single Period

Period: ▼

Output:  

NEW HAMPSHIRE TRAVEL IMPACTS

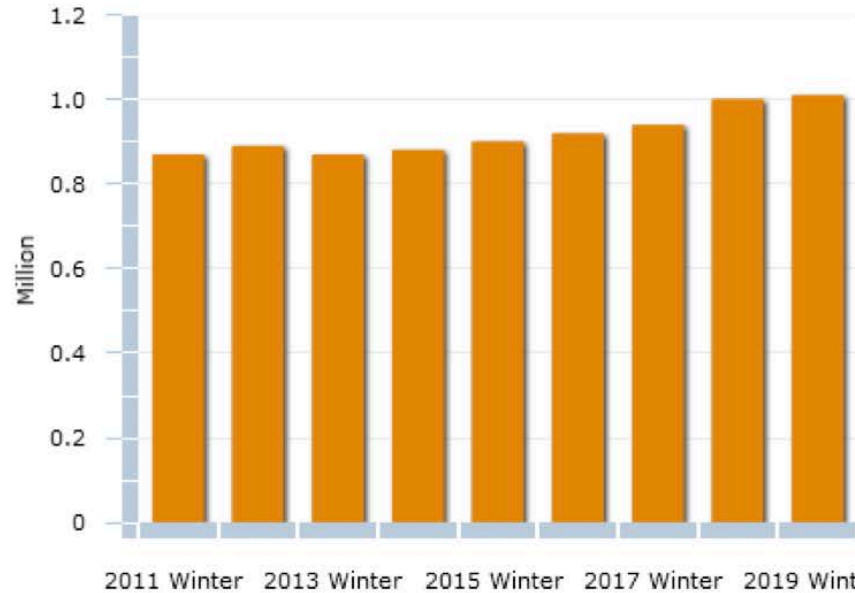
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You selected: **New Hampshire State**

[Change Selection](#)

- ▼ Travel Impacts
 - ▶ Total Direct Travel Spending
 - ▶ Visitor Direct Spending
 - ▶ Direct Earnings
 - ▶ Direct Employment
 - ▶ Total Direct Tax Receipts
 - ▼ Overnight Visitor Volume
 - Party Trips
 - Party Nights
 - Person Trips
 - Person Nights
 - ▶ Average Overnight Spending



Overnight Visitor Volume (Party Trips), Winter New Hampshire State



Period	Million	Change
2019 Winter	1.01	0.34%
2018 Winter	1.00	6.34%
2017 Winter	0.94	2.03%
2016 Winter	0.92	2.32%
2015 Winter	0.90	2.02%
2014 Winter	0.88	1.54%
2013 Winter	0.87	-1.68%
2012 Winter	0.89	1.72%

Annual Trend
 Seasonal Trend
 Single Period

Period: Winter

Output:  

NEW HAMPSHIRE TRAVEL IMPACTS

[View Definition of Terms](#)

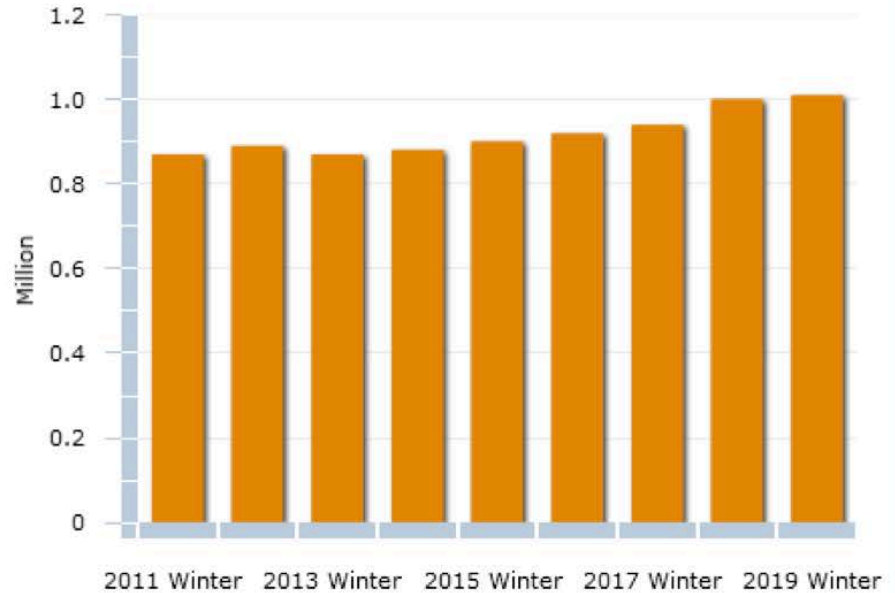
You selected: **New Hampshire State**

[Change Selection](#)

▼ Travel Impacts

- ▶ Total Direct Travel Spending
- ▶ Visitor Direct Spending
- ▶ Direct Earnings
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Annual Trend Seasonal Trend Single Period

Period: Winter

Output:  



insights

Strategic Marketing and Research

Chair Report



Old Business



New Business

Adjourn



Next Meeting Date

December 17, 2019