

# OUTER BANKS VISITORS BUREAU SOCIAL MEDIA ROI STUDY 2016

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Final Report of Findings—May 2016

Research prepared for the Outer Banks Visitors Bureau by Destination Analysts, Inc.

## Introduction

### Research Objectives

This report presents the findings of a study of followers of three of the Outer Banks Visitors Bureau's social media assets: Facebook (Facebook.com/TheOuterBanks), Twitter (Twitter.com/theouterbanks) and Instagram (Instagram.com/theouterbanksnc). This research was conducted on behalf of the Outer Banks Visitors Bureau by Destination Analysts, Inc., with the primary objective of generating Return on Investment (ROI) estimates—in terms of incremental trip days and associated in-market spending generated—for these three social marketing programs. The research also explored content preferences, destination perceptions, and demographic and psychographic profiles of the Visit The Outer Banks' followers through these channels.

### Methodology

Working closely with the Outer Banks Visitors Bureau (OBVB), Destination Analysts developed a base questionnaire which addressed the core objectives of this research. This questionnaire was then adopted for each of the three social media channels studied. The Outer Banks Facebook, Twitter and Instagram followers were then invited to complete a survey about their travel behaviors and opinions through a series of promoted posts and tweets. As an incentive to complete the survey, survey respondents were entered in a prize drawing to win one of several prizes. The surveys were fielded in April 2016. In total, 3,691 completed surveys were collected from Facebook followers, 425 completed surveys were collected from Twitter followers and 606 completed surveys were collected from Instagram followers.

## Social Media ROI Estimation Methodology

The ROI estimates derived for this study include all direct spending in the Outer Banks by two types of visitors: (1) those who live outside the Outer Banks and took **incremental trips** to the area that were inspired by Visit The Outer Banks Facebook, Twitter or Instagram content and (2) those that **increased their intended length of stay in the Outer Banks** based on Visit The Outer Banks Facebook, Twitter or Instagram content. These two visitor types are described below:

1. Visitors on incremental trips: To be considered an incremental visitor, survey respondents had to state that content received through Visit The Outer Banks Facebook, Twitter or Instagram accounts motivated a trip to the Outer Banks and that this content was “Important” or “Very important” to this decision to ultimately visit the area.
2. Visitors who extended their stay as a result of Visit The Outer Banks Facebook, Twitter or Instagram marketing: Leisure travelers who did not state that Visit The Outer Banks Facebook, Twitter or Instagram content influenced their decision to visit the Outer Banks, and all business and convention travelers, were asked a series of questions on the influence of Visit The Outer Banks Facebook, Twitter or Instagram content on their intended length of their stay in the Outer Banks. Visitor spending impact estimates for this group only include spending during reported “additional” days in market generated by Visit The Outer Banks Facebook, Twitter or Instagram content.

The survey questionnaire was designed to identify the information needed to estimate the incidence of these two types of travelers in the population of the Outer Banks Visitors Bureau’s social media audiences, as well as their spending in market. Statistics collected in the survey were applied to each social media channel's audience size to arrive at the ROI estimates presented here.

## Quick Facts

The profile below shows a summary of fundamental findings and descriptive statistics emerging from this research. The Facebook ROI estimates are based on an average of 46,802 followers reached, the Twitter ROI estimates are based on an average 9,817 followers reached and the Instagram ROI estimates are based on an average 23,300 followers reached. These reached audience estimates are based on a twelve-month period (May 2015-May 2016).

	<b>Facebook ROI Estimates:</b>	<b>Twitter ROI Estimates:</b>	<b>Instagram ROI Estimates:</b>
Incremental trips to the Outer Banks generated by respective social media marketing:	8,908 trips	1,006 trips	2,133 trips
Total visitor days in the Outer Banks on influenced trips:	48,665 days	5,461 days	9,809 days
Average visitor spending per-day on incremental trips to the Outer Banks:	\$323.45	\$328.94	\$344.20
Total visitor spending on incremental trips to the Outer Banks:	\$15,740,625	\$1,796,400	\$3,376,273
Additional days spent in the Outer Banks on trips extended by respective social media marketing:	2,395 days	617 days	554 days
Total visitor spending on trips extended by respective social media marketing:	\$774,709	\$202,985	\$190,657
Total visitor spending impact of respective social media marketing:	\$16,515,334	\$1,999,384	\$3,566,930
Total visitor spending impact per respective social media follower reached:	\$352.88	\$203.67	\$153.09

Note: Destination Analysts' approach to modeling the economic impact of tourism activity stresses conservatism, and in cases where sub-sample sizes are small, data sets are carefully examined and the most reliable and defensible data input to use in the model is selected.

## Comparison to Other DMOs

The table below shows how The Outer Banks' key ROI metrics compare to other DMO social media marketing for which this same research has been conducted.

Destination	Facebook			Twitter		
	Percent of trips where Facebook had substantial importance in decision to visit	Percent lengthening trip due to Facebook	Total visitor spending impact per respective Facebook follower	Percent of trips where Twitter had substantial importance in decision to visit	Percent lengthening trip due to Twitter	Total visitor spending impact per respective Twitter follower
<b>The Outer Banks</b>	48.5%	14.1%	\$352.88	36.4%	17.2%	\$203.67
<b>Destination A</b>	50.9%	22.4%	\$168.23	55.0%	15.5%	\$134.86
<b>Destination B</b>	51.9%	22.3%	\$66.05	--	--	--
<b>Destination C</b>	40.7%	3.2%	\$32.46	45.5%	4.8%	\$29.33
<b>Destination D</b>	58.7%	16.5%	\$71.63	--	--	--
<b>Destination E</b>	53.1%	19.2%	\$103.39	44.7%	20.3%	\$36.11
<b>Destination F</b>	53.5%	31.2%	\$154.00	--	--	--
<b>Destination G</b>	35.9%	23.5%	\$49.54	18.5%	33.3%	\$17.86
<b>Destination H</b>	41.7%	3.3%	\$85.81	31.3%	0.0%	\$31.29
<b>Average for all other destinations (excluding Outer Banks)</b>	<b>48.3%</b>	<b>17.7%</b>	<b>\$91.39</b>	<b>39.0%</b>	<b>14.8%</b>	<b>\$49.89</b>
<b>Average for smaller cities/boutique destinations (Destinations A-E)</b>	<b>51.1%</b>	<b>16.7%</b>	<b>\$88.35</b>	<b>48.4%</b>	<b>13.5%</b>	<b>\$66.77</b>
<b>Average for major cities (Destinations F-G)</b>	<b>44.7%</b>	<b>27.4%</b>	<b>\$101.77</b>	--	--	--

\*\* Note: Destinations A-E are smaller U.S. cities/boutique destinations. Destinations F-G are major U.S. cities. Destination H is a state.

## Executive Summary

The studies key ROI findings are summarized below.

### Facebook ROI

- **Incremental trips to the Outer Banks generated by Visit The Outer Banks Facebook marketing:** An estimated 8,908 incremental trips were generated for the Outer Banks over a 12-month period by the OBVB's marketing to its Facebook audience. An incremental trip is one in which the visitor decided to visit The Outer Banks based on Visit The Outer Banks Facebook content. These are trips to the area that would not have happened if the Outer Banks Visitors Bureau did not market through this medium, and thus any visitor spending in The Outer Banks on these trips can be counted as part of the marketing program's economic impact. These incremental trips are estimated to have generated \$15,740,625 in visitor spending in the Outer Banks.
- **Additional days spent in the Outer Banks generated by Facebook marketing:** A second way Visit The Outer Banks Facebook marketing can generate economic impact for the Outer Banks is by convincing visitors to extend their intended stays in The Outer Banks. The research findings estimate that Visit The Outer Banks Facebook content generated 2,395 additional visitor days in The Outer Banks in a 12-month period. Assuming that these visitors spent \$323.45 per day while in The Outer Banks, this resulted in an additional \$774,709 in incremental visitor spending in the area.
- **Total Estimated Economic Impact:** The two components discussed above (spending on incremental trips and additional days in-market) comprise the Facebook marketing program's economic impact as defined in this study. Based on these

findings, Visit The Outer Banks Facebook marketing accounted for \$16,515,334 in direct visitor spending in the Outer Banks during May 2015-May 2016. As it is estimated that Visit The Outer Banks reached 46,802 followers on Facebook on average during this time period, it is estimated that each follower reached represented \$352.88 in economic impact to the Outer Banks area.

## Twitter ROI

- **Incremental trips to the Outer Banks generated by the Visit The Outer Banks Twitter marketing:** An estimated 1,006 incremental trips were generated for The Outer Banks in a 12-month period by the Outer Banks Visitors Bureau's marketing through Twitter. Again, an incremental trip is one in which the visitor decided to visit The Outer Banks based on tweets/content from @TheOuterBanks. These incremental trips are estimated to have generated \$1,796,400 in visitor spending in the Outer Banks.
- **Additional days spent in the Outer Banks generated by the Visit The Outer Banks Twitter marketing:** The research findings estimate that Visit The Outer Banks tweets/content generated 617 additional visitor days in the Outer Banks during the period of study from Twitter followers who extended their intended length of stay in the area. These visitors spent \$328.94 per day on average while in the Outer Banks, resulting in an additional \$202,985 in incremental visitor spending for the area.
- **Total Estimated Economic Impact:** It is estimated that Visit The Outer Banks Twitter marketing generated \$1,999,384 in direct visitor spending in The Outer Banks in 12 months. Alternatively, as @TheOuterBanks reached 9,817 Twitter followers on average during this time period, each reached follower represented \$203.67 in economic impact to the area.

## Instagram ROI

- **Incremental trips to the Outer Banks generated by Visit The Outer Banks Instagram account:** An estimated 2,133 incremental trips were generated for Visit The Outer Banks by its marketing through Instagram during the period of study. Again, an incremental trip is one in which the visitor decided to visit The Outer

Banks based on content from @TheOuterBanksNC on Instagram. These incremental trips are estimated to have generated \$3,376,273 in visitor spending in The Outer Banks.

- **Additional days spent in the Outer Banks generated by Visit The Outer Banks Instagram account:** The research findings estimate that Visit The Outer Banks Instagram content generated 554 additional visitor days in the Outer Banks during May 2015 - May 2016. These visitors spent \$344.20 per day on average while in The Outer Banks, resulting in an additional \$190,657 in incremental visitor spending in the area.
- **Total Estimated Economic Impact:** It is estimated that at the time of the study, Visit The Outer Banks Instagram feed accounted for approximately \$3,566,930 in direct visitor spending in The Outer Banks. Alternatively, as @TheOuterBanksNC is estimated to have reached 23,300 Instagram followers, each follower represented \$153.09 in economic impact to The Outer Banks.

## Other Key Findings

- **Visit The Outer Banks Facebook, Twitter and Instagram followers are engaged with Visit The Outer Banks' content.** Over 80 percent of followers read Visit The Outer Banks' Facebook content at least once a week, including 62.1 percent who report reading the content multiple times a week. Similarly, 87.1 percent of Twitter followers read the content posted by @TheOuterBanks on Twitter "once a week" (19.3%) or "multiple times a week" (67.8%) and 74.5 percent of Instagram followers read the content posted by @TheOuterBanksNC on Instagram "once a week" (26.5%) or "multiple times a week" (48.0%).
- **General information about The Outer Banks that would apply to any time is the most popular type of content Visit The Outer Banks Facebook, Twitter and Instagram audiences would like to see the organization post, although lighthouses/historic sites and beach/beach activity related content is the most influential in actually motivating followers to visit The Outer Banks.** 64.1 percent of Facebook followers, 68.6 percent of Twitter followers and 58.0 percent of Instagram followers reported that general information about The Outer Banks (applicable to anytime) would be of most interest to them—making this the top content requested across all three audiences in



aggregate. Nevertheless, content on beach and beach activities (59.3% of Facebook followers; 63.1% of Twitter followers; 63.2% of Instagram followers) and deals and discounts (59.6% of Facebook followers; 55.2% of Twitter followers; 61.1% of Instagram followers) are also of strong interest to the majority of Visit The Outer Banks Facebook, Twitter and Instagram audiences. When those who were influenced by the Outer Banks Visitors Bureau’s content to actually take a trip to The Outer Banks were asked which types of these content were most important to this decision, across all three media “Lighthouses and historic sites” and information on “beaches and beach activities” were the most influential.

- **Visit The Outer Banks Facebook, Twitter and Instagram audiences primarily follow the destination because they feel a connection to The Outer Banks and like to keep up with what is going on there; past visitation to the Outer Banks also drives audience growth on these media.** Over 70 percent of Facebook (72.2%) and Twitter (72.9%) followers and 55.4 percent of Instagram followers report following The Outer Banks on these respective social media channels because they “feel a connection to The Outer Banks and like to keep up with what is going on there.” Trips to the Outer Banks—and the likely satisfactory experience the destination provides visitors—clearly also serve as motivator for following The Outer Banks on social media. Approximately 40 percent of audience members from these studied media report following Visit The Outer Banks after visiting the area (45.6% of Facebook followers; 43.0% of Twitter followers; 37.0% of Instagram followers).
- **Following Visit The Outer Banks social media assets has positively impacted these audiences’ perception of The Outer Banks.** Approximately 60 percent or more of social media followers (63.5% of Facebook followers; 59.5% of Twitter followers; 62.5% of Instagram followers) report that following Visit The Outer Banks on Facebook, Twitter or Instagram has positively impacted their perception of the destination either “a little” or “a lot.”

# Snapshot of Findings— Visit the Outer Banks Facebook Follower



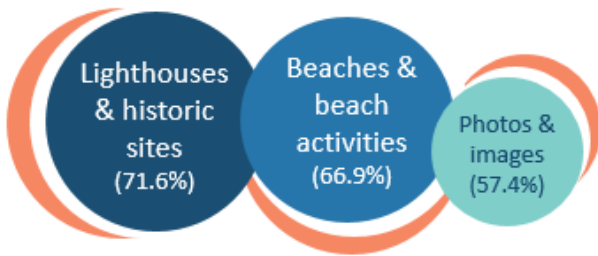
## Facebook Follower Details (% of all Facebook respondents)



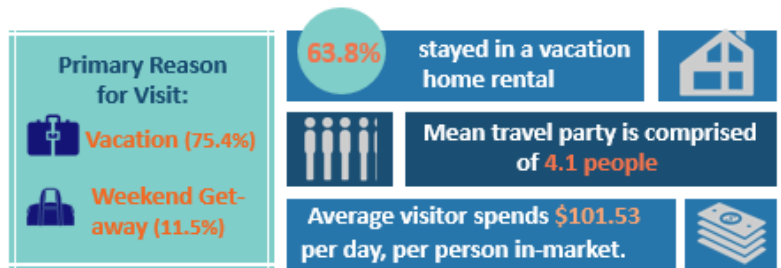
## Trips to The Outer Banks (% of all Facebook respondents who have taken a trip to The Outer Banks since following The Outer Banks on Facebook)



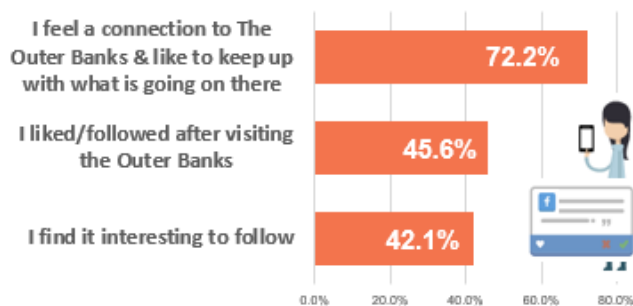
## Top Influential Facebook Content Motivating Trip to The Outer Banks (% of all respondents who have taken a trip to The Outer Banks since following Visit The Outer Banks on Facebook)



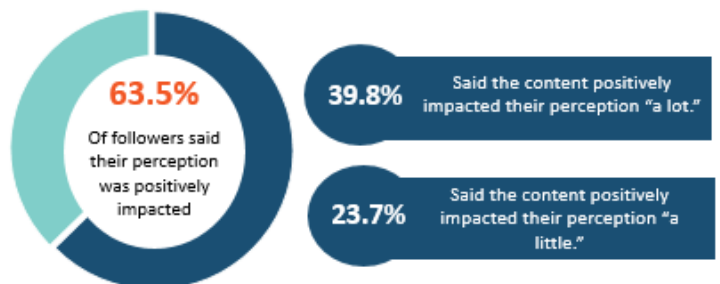
## Trip Details (% of all respondents who have taken a trip to The Outer Banks since following Visit The Outer Banks on Facebook)



## Reasons for Following Visit The Outer Banks on Facebook (% of all Facebook respondents)



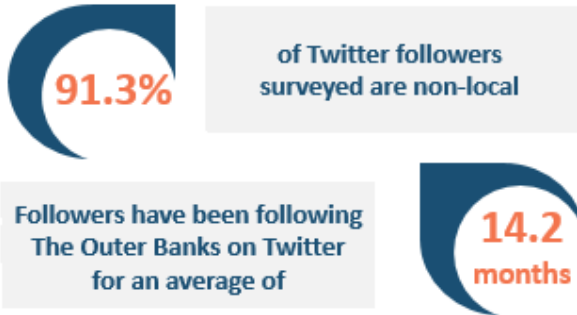
## Outer Banks Facebook Content's Impact on Followers' Perception of The Outer Banks (% of all Facebook respondents)



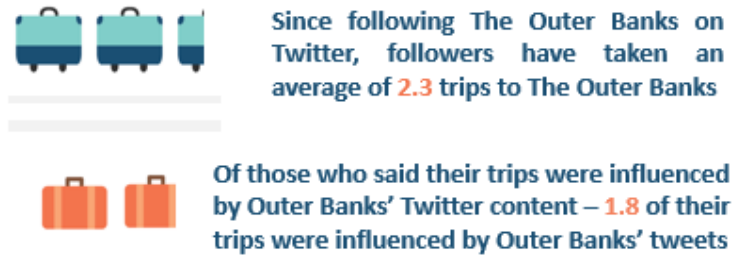
# Snapshot of Findings – Visit the Outer Banks Twitter Follower



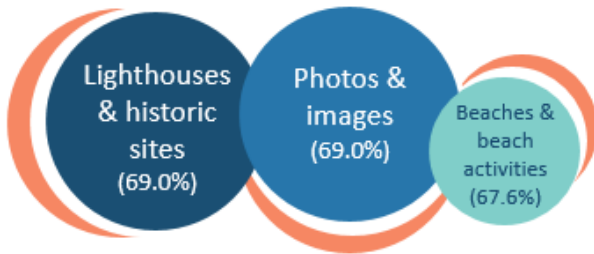
## Twitter Follower Details (% of all Twitter respondents)



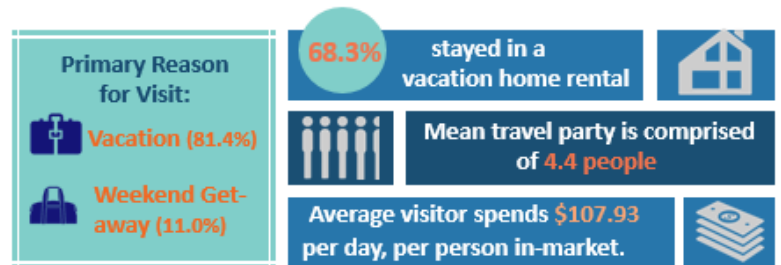
## Trips to The Outer Banks (% of all Twitter respondents who have taken a trip to The Outer Banks since following The Outer Banks on Twitter)



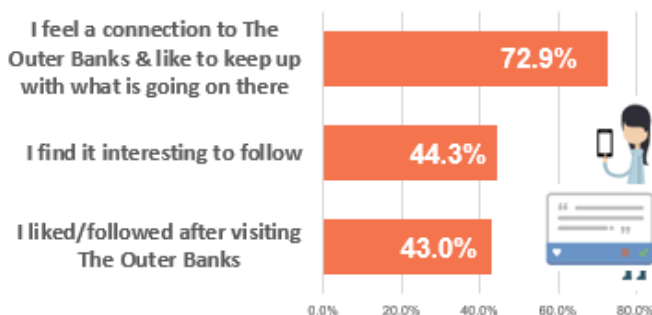
## Top Influential Twitter Content Motivating Trip to The Outer Banks (% of all respondents who have taken a trip to The Outer Banks since following Visit The Outer Banks on Twitter)



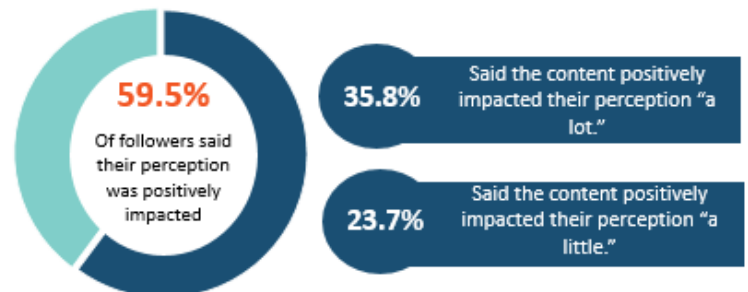
## Trip Details (% of all respondents who have taken a trip to The Outer Banks since following Visit The Outer Banks on Twitter)



## Reasons for Following Visit The Outer Banks on Twitter (% of all Twitter respondents)



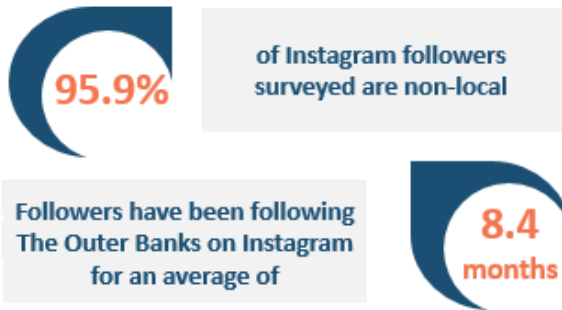
## The Outer Banks Twitter Content's Impact on Followers' Perception of The Outer Banks (% of all Twitter respondents)



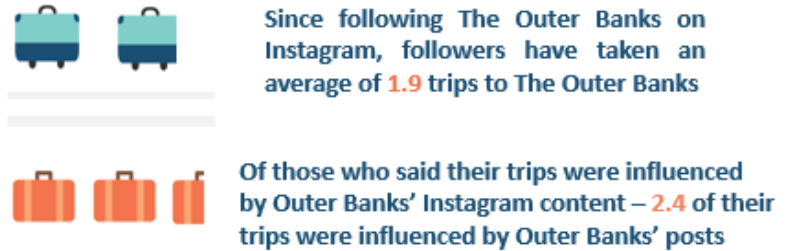
# Snapshot of Findings – Visit The Outer Banks Instagram Follower



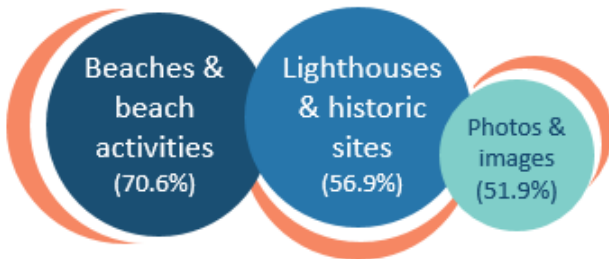
## Instagram Follower Details (% of all Instagram respondents)



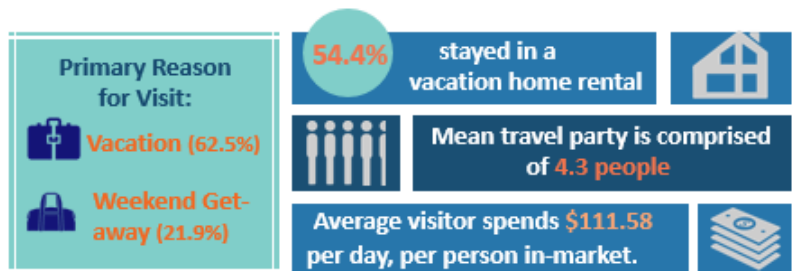
## Trips to The Outer Banks (% of all Instagram respondents who have taken a trip to The Outer Banks since following Visit The Outer Banks on Instagram)



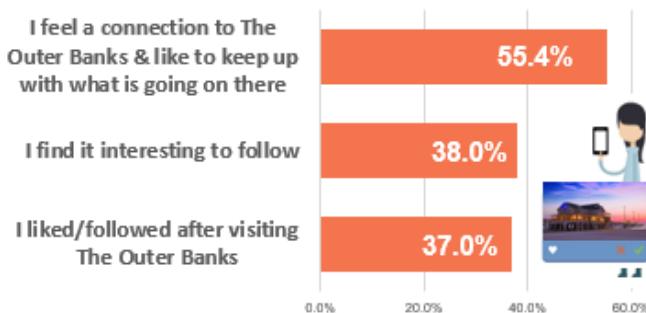
## Top Influential Instagram Content Motivating Trip to The Outer Banks (% of all respondents who have taken a trip to The Outer Banks since following Visit The Outer Banks on Instagram)



## Trip Details (% of all respondents who have taken a trip to The Outer Banks since following Visit The Outer Banks on Instagram)



## Reasons for Following Visit The Outer Banks on Instagram (% of all Instagram respondents)



## Visit The Outer Banks Instagram Content's Impact on Followers' Perception of The Outer Banks (% of all Instagram respondents)

