



Tourism Economic Development Report

An official publication of the Greater Raleigh Convention and Visitors Bureau

visitRaleigh.com

DECEMBER 2014

WAKE COUNTY CAPSULE

Hotel occupancy tax collections were up 13.9 percent for the calendar year beginning January-October 2014 compared to the same period of January-October 2013 and **prepared food and beverage tax collections were up 7.0 percent** during the same period.

GROUP SALES

In November, the Group Sales Department produced 78 leads totaling 66,854 room nights for an Estimated Economic Impact of \$39,502,603. The 40 definite pieces of business with 5,756 total room nights at an EEI was \$4,492,750. November was a good month for sales! Traveling took up a good portion of sales time, putting Wake County in front of many planner's faces. Nicole Robinson, Sales Coordinator, traveled to Southern Pines, NC to attend the MPI Carolinas monthly meeting. Also attending was Loretta Yingling, National Sales Manager, and Malinda Harrell, Associate Director of Sales. They also attended the AENC Marketing and Communications Conference in Durham. Loretta attended the monthly SGMP meeting in Durham, while Malinda Harrell attended the November monthly Gampi Meeting in Atlanta. Jamie Rice, Regional Director of National Accounts, attended the Monthly PCMA Capital Chapter meeting, as well as the PCMA annual Capital Chapter meeting. Stephen Jackson, Senior National Sales Manager, headed to New York City for the Monthly MPI meeting. He also was in Cincinnati for the National Coalition of Black Meeting Planners on November 12-15. Jana Rae Oliver, Director of Sales, was in Tampa November 22-26 for the Nurses Organization Alliance annual meeting and tradeshow.

SPORTS MARKETING

November was marked by two significant sports highlights: (1) Raleigh was named as a site for the 2016 NCAA Men's Basketball Tournament, with NC State University serving as the official host. Dates are March 17-19, and of course the venue is PNC Arena, which will be hosting "March Madness" for the second time in three years, and the 4th time in a 13-year span. The GRSA will serve as a host partner supporting NC State; and (2) The inaugural Rock 'n' Roll Raleigh Marathon & ½ Marathon was named "Best New Sporting Event" of 2014 by SportsTravel magazine. An exceptionally busy sports schedule in November included the CASL visitRaleigh.com National Soccer Series which, over the course of four weekends (stretching into December), will bring more than 1,200 youth teams to Wake County. Those teams will account for more than 35,000 total visitors, more than 30,000 hotel room nights, and more than \$9 million in direct visitor spending. The NSS remains the largest sporting event in Triangle history, based on number of teams. WakeMed Soccer Park in Cary was the site of the 2014 ACC Men's Soccer Championship, hosted by the Town of Cary, the Capital Area Soccer League and the GRSA. Clemson claimed the tournament title. Three NCHSAA state championships were hosted by the City of Raleigh in November, including volleyball (at Reynolds Coliseum), men's soccer (at NC State's Dail Stadium), and cheerleading (at the Raleigh Convention Center). Raleigh hosts more NCHSAA state

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championships (12) than any N.C. city. Greater Raleigh also hosted two major events over the Thanksgiving holiday weekend, the Pop-Warner Mid-South Football and Cheerleading Championships (at Raleigh Convention Center and Rolesville High School), as well as the Nike Cross National Southeast Regional (at Cary's WakeMed Soccer Park). GRSA staff members represented Wake County at TEAMS, which is the sports event industry's largest annual gathering of event owners, rights-holders and sports tourism officials. And, most importantly, the GRSA's Jason Philbeck and Carla Davis of the N.C. Museum of Natural Sciences announced their engagement!

PUBLIC RELATIONS

The Communications Department wrote and distributed numerous press releases in November to targeted lists of local, regional and national media. Press releases included a holiday-themed release encouraging visitors to "Create New Holiday Traditions in Greater Raleigh," and the second was a culinary-themed release titled "Everyone Eats Better in Greater Raleigh." The Communications Department also helped distribute a release to local media on the Rock 'n' Roll Marathon & 1/2 Marathon presented by WRAL benefiting The V Foundation being awarded the "Best New Sporting Event" in 2014 by *SportsTravel* magazine and collaborated on and distributed a release on the economic impact of the recent Association of Science - Technology Centers Annual Conference, which was held at the Raleigh Convention Center and the North Carolina Museum of Natural Sciences. The Communications Department also hosted Winston Salem-based food journalist and freelance travel writer Nikki Miller-Ka while she was in town for Competition Dining's Final Fire culinary competition held at the Renaissance Raleigh North Hills Hotel.

SERVICES

This is the time of year when typically our arriving groups start to wind down a little due to holiday impacts, although this year November remained very strong for us. Combining both sports groups and meetings/conventions, we were up slightly over November 2013. Year-to-date we are a strong 14% ahead of last years to date numbers. In the VIC we are a little off year-to-date in our visitor center production, but this should rebound after the holidays. Our visitor guide delivery service continues to be very popular. Linda is just about to finish the first round of hotel visits and will soon start on primary attractions.

In the way of other activity: Primary convention center based groups included NC Veterinary Science Convention (2000 attendees), NC Youth Ministries (2500 attendees), and NC Assn. for Athletics, Health, Physical Education, Recreation and Dance/Sports Management with 1000 attendees. Services was recognized at the local host committee wrap up meeting for our role in hosting/supporting ASTC (thank you to Ryan Smith for distributing and releasing an effective post event press release documenting the economic impact of \$2.28 million, attendance at close to 2000 from 38 countries and positioning the NC Museum of Natural Sciences on a global level as a primary science museum). We also supported a new day conference, the Energy Thought Summit, which was an important meeting for the Triangle based Cleantech Cluster. Services attended the World of Bluegrass local host committee post event celebration and are also working hard to assess post event analyses of Services' various roles for this year's WOB. Lenovo will again host its North American Sales Kickoff here in Raleigh at the RCC, and we attended a planning session to launch preparations for the April 2015 event. Julie conducted an attendance promotion in Long Beach, California in prep. for Raleigh to host Bouchercon 2015 – Bouchercon is a well-recognized event for the mystery literature genre. The event will attract well known and emerging writers as well as fans



from all over the world and will be exciting for Raleigh to host. Finally, Services joined Marketing to attend a meeting with Shop Local Raleigh to discuss partnership opportunities for the future.

MARKETING

The Bureau's Artful Holidays Nov.-Dec. visitor promotions began, anchored by Tchaikovsky's *The Nutcracker* (Dec. 19-28), presented by Carolina Ballet, and Ira David Wood III's *A Christmas Carol* (Dec. 10-14), presented by Theatre In The Park, and other holiday events related to the Creative Genius Destination I.D. Marketing communications are geared to invite families to create new holiday traditions by spending an artful holiday weekend in Greater Raleigh. The Marketing Department hosted its Fall Marketing Update Meeting on Nov. 6 at Triangle Rock Club (Morrisville location) to discuss this and other upcoming partnership marketing opportunities; the department also hosted a webinar version with the same content on Nov. 18. On Nov. 13, GRCVB convened the quarterly meeting of Wake County's Cultural Presenters Forum, hosted at the Holly Springs Cultural Center; the forum of our area's 50+ major cultural presenters meets to discuss cross-promotions (such as Oct.'s 31 Days of Art) and to collaborate on other audience development initiatives together and with GRCVB. On Nov. 19, the Marketing Department held its quarterly meeting with representatives from Wake County breweries; the area breweries are beginning to lay plans with GRCVB for the next Greater Raleigh Beer Month (Apr. 2015), co-op advertising placements and future public relations opportunities. GRCVB and North Carolina Museum of Natural Sciences (NCMNS) staff met on Nov. 24 to finalize plans for a visitor promotion surrounding *The World's Largest Dinosaurs* exhibit, now at the museum; the visitor-oriented, integrated marketing campaign, centered on NCMNS but also featuring other Lifelong Learner experiences in Greater Raleigh, will run in Jan. and Feb. Senior marketing manager Derek Allman attended the 2014 Internet Summit, Nov. 11-13, at the Raleigh Convention Center; he also attended the Social Media Tourism Symposium (SoMeT), Nov. 19-21, in Nashville, Tenn. (SoMeT is the only conference of its kind that provides an opportunity for destinations to share ideas and learn more about how to leverage social media within the tourism sector.) Under GRCVB's external advertising plan for the month of Nov., leisure-related placements appeared on shermanstravel.com, gardenandgun.com and visitnc.com; GRSA-related placements appeared on sportscommissions.org and in *Sports Destination Management*, *Sports Events* and *Sports Travel* magazines, in a *Sports Business Journal* issue and on SBJ's websites; and meetings-related placements appeared in AENC's and MPI-CC's annual directories, in *Meetings Focus*, *Convene*, *M&C* and *Prevue* magazines and on IAEE's and MPI's websites.



**VISITOR INDUSTRY STATISTICAL REPORT
OCTOBER 2014
HOTEL OCCUPANCY PRODUCTION**

	Chg. from Oct '13	Wake County	North Carolina	United States
Oct 2014 Occupancy %	+7.2%	74.0%	69.0%	68.0%
Oct 2014 ADR	+6.1%	\$94.15	\$98.38	\$118.87
Oct 2014 RevPar	+13.7%	\$69.62	\$67.86	\$80.81
2014 YTD Occupancy %	+8.0%	69.3%	62.8%	66.1%
2014 YTD ADR	+5.3%	\$91.34	\$91.71	\$115.85
2014 YTD RevPar	+13.7%	\$63.33	\$57.59	\$76.62

Source: Smith Travel Research, Inc.-Stats lag by one month; Republication or other re-use of this data without the express written permission of STR is strictly prohibited.

AVIATION PRODUCTION

Source: Raleigh-Durham International Airport-Stats lag by one month and reflect Calendar Year 2014

	OCT 2014	2014 YTD	YTD% Change from 2013
Passenger Enplanements	428,121	3,943,804	+3.8%
Passenger Deplanements	432,939	3,973,235	+3.8%

RALEIGH CONVENTION CENTER INFORMATION

Activity by Year	2008	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total
At RCC (Definite)	14	45	55	60	54	60	58	31	18	13	9	5	4	0	0		426
At RCC (Tentative)							3	21	16	11	8	5	2				66

Above numbers are GRCVB assisted definite and tentative bookings for the RCC

GROUP SALES DEFINITE ROOM NIGHT PRODUCTION

	November 2014	YTD	14/15 YTD Monthly Goal	Fiscal YTD +/- Variance
Total Room Nights	5,756	38,887	47,315	-19.9%
Estimated Economic Impact	\$4,492,750	\$21,911,353	\$25,000,000	-12.4%
Number of Definite Bookings	40	107	75	+42.7%

GROUP SALES TENTATIVE ROOM NIGHT PRODUCTION

	November 2014	YTD	14/15 YTD Monthly Goal	Fiscal YTD +/- Variance
Total Room Nights	66,854	429,297	141,460	125.7%
Estimated Economic Impact	\$39,502,603	\$209,719,331	\$98,750,000	112.4%
Number of Tentative Leads	78	391	230	70.0%



SPORTS MARKETING ASSISTED DEFINITE ROOM NIGHT PRODUCTION

	November 2014	YTD	14/15 YTD Monthly Goal	Fiscal YTD +/- Variance
Total Room Nights	8,910	78,201	43,668	+ 79%
Estimated Economic Impact	\$2,312,963	\$21,197,302	\$14,458,102	+ 46%
Number of Definite Bookings	5	27	31	-13%

VISITOR SERVICES PRODUCTION

	November 2014	FY 14/15 YTD	YTD% Chg from 13/14
# of Groups Serviced	36	278	+14.0%
# of Visitor Information Center Visitors	608	5,307	-17.0%
# of Visitor Inquiries	186	1,810	-1.0%

VISITOR GUIDE DELIVERY SERVICE TO PARTNERS

This is a new service that we have begun as of October 2014

	NOV 2014	2014 YTD	YTD % Chg from 13/14
Partners Serviced	67	97	**baseline #s
Visitor Guides Delivered	7,800	10,850	**baseline #s

CONVENTION CENTER DEFINITE BOOKINGS

Group Name	Meeting Dates	Total Room Nights	Total Attendance	Est. Econ. Impact
Sports Convention Center Definite				
Sales Convention Center Definite				
NC Restaurant and Lodging Association	9/17-23/15	360	300	\$347,113
NC Chapter - American Planning Association	10/20-22/15	350	500	\$162,750
TOTAL (A)		710	800	\$509,863

GROUP SALES/SPORTS MARKETING ASSISTED DEFINITE BOOKINGS

NC USSSA Fastpitch Winter Nat'ls	11/14-15/14	450	700	\$100,800
NCYSA Southern Soccer Meeting	1/22-24/15	190	200	\$42,210
ACC Tennis Championships	4/22-25/15	1,320	700	\$284,080
Ironman 70.3 Raleigh	5/30-31/15	4,500	5,000	\$1,006,125
NCAA Baseball D-II World Series	5/21-30/15	2,450	1,000	\$879,748
SPORTS TOTAL (B)		8,910	7,600	\$2,312,963

NC Association of Electric Cooperatives	1/5-6/15	15	35	\$12,797
The American Board of Anesthesiology, Inc.	1/6-7/15	4	4	\$1,672
The American Board of Anesthesiology, Inc.	1/12-14/15	14	7	\$4,119
Meeting Professionals International - Carolinas Chapter	1/12-14/15	35	150	\$28,980
The American Board of Anesthesiology, Inc.	1/29-30/15	13	13	\$5,435
The American Board of Anesthesiology, Inc.	1/29-30/15	15	15	\$6,272
NC Association of Electric Cooperatives	2/10-11/15	60	80	\$29,251
The American Board of Anesthesiology, Inc.	3/8-9/15	34	34	\$14,216
The American Board of Anesthesiology, Inc.	3/8-12/15	140	35	\$36,049
The American Board of Anesthesiology, Inc.	3/8-12/15	180	36	\$45,234
NC Association of Electric Cooperatives	3/10-11/15	15	35	\$12,797
NC Association of Electric Cooperatives	3/17-18/15	110	150	\$70,231
FIRST (For Inspiration and Recognition of Science and Technology)	3/17-22/15	1,583	2,200	\$2,327,785
NC Association of Electric Cooperatives	3/24-27/15	50	30	\$20,098
NC Association of Electric Cooperatives	4/13-16/15	285	400	\$331,990
The American Board of Anesthesiology, Inc.	4/17-19/15	26	13	\$7,650
The American Board of Anesthesiology, Inc.	4/19-23/15	136	34	\$35,019
The American Board of Anesthesiology, Inc.	4/28-29/15	17	34	\$14,216
The American Board of Anesthesiology, Inc.	4/30-5/1/15	23	23	\$9,617
The American Board of Anesthesiology, Inc.	5/3-07/15	128	32	\$32,959
NC Association of Electric Cooperatives	5/12-13/15	15	35	\$12,797
The American Board of Anesthesiology, Inc.	6/7-11/15	128	32	\$32,959



NC Association of Electric Cooperatives	6/13-14/15	20	40	\$14,912
Southeastern Association of School Business Officials	06/16-20/15	50	23	\$19,708
NC Association of Electric Cooperatives	7/7-08/15	15	35	\$12,797
Governor Morehead School Alumni Association	8/6-9/15	40	80	\$25,575
NC Association of Electric Cooperatives	8/11-12/15	15	35	\$12,797
The American Board of Anesthesiology, Inc.	10/4-8/15	132	33	\$33,989
The American Board of Anesthesiology, Inc.	10/11-15/15	140	35	\$36,049
NC Association of Electric Cooperatives	10/13-14/15	15	35	\$12,797
NC Association of Electric Cooperatives	10/21-23/15	122	65	\$34,838
NC Association of Electric Cooperatives	12/8-9/15	15	35	\$12,797
North Carolina Veterans of Foreign Wars	2/4-7/16	186	200	\$66,366
North Carolina Veterans of Foreign Wars	6/2-/5/16	403	250	\$203,457
North Carolina Veterans of Foreign Wars	10/6-9/16	139	200	\$60,189
North Carolina Veterans of Foreign Wars	2/2-5/17	186	120	\$47,646
North Carolina Veterans of Foreign Wars	6/1-4/17	403	250	\$121,173
North Carolina Veterans of Foreign Wars	10/5-8/17	139	200	\$175,635
SALES TOTAL (C)		5,046	5,063	\$3,982,868
Total (A+B+C)		14,666	13,463	\$6,805,694

BIDS SUBMITTED FOR GROUP SALES/SPORTS MARKETING

	Meeting Dates	Total Room Nights	Attendance	Estimated Economic Impact
SPORTS MARKETING				
GROUP SALES				
Etix Live Event 2015	3/10-13/15	20	25	\$16,749



2015 Youth Legislative Assembly	3/20-22/15	230	225	\$116,034
iiBig Conference	4/23-26/15	280	200	\$139,552
NC Parent Resource Center Conference	5/19-20/15	100	200	\$87,169
Summer Convention East	7/8-12/15	443	1,200	\$465,089
Miss North Carolina Pageant	7/12-17/15	375	300	\$275,989
Apostolic Faith Fellowship International Conference 2015	8/3-8/15	1,065	500	\$539,979
Arabian Horse Association	9/12-21/15	6,440	1,375	\$2,930,436
Cosplay America 2015	9/18-20/15	50	1,000	\$137,402
Mid South Independent School Business Officers	10/6-10/15	144	120	\$99,897
Association of Junior Leagues International Organizational	3/16-20/16	276	400	\$156,507
National Association of Health Underwriters	6/23-29/16	1,680	1,000	\$1,450,252
Apostolic Faith Fellowship International Conference 2016	8/1-6/16	1,065	500	\$539,979
Omega Psi Phi Leadership Conference	7/17-23/17	1,464	700	\$797,707
Environmental Mutagen & Genomics Society	9/7-14/17	950	750	\$1,184,155
NC Healthcare Information and Communications Alliance	9/17-20/17	200	300	\$215,082
NC Reading Association	3/29-4/2/19	555	1,400	\$1,265,931
NC Reading Association	3/20-24/20	555	1,400	\$1,265,931
American Association of Aerosol Research 2020	10/1-10/20	1,302	600	\$910,599
NC Reading Association	3/19-23/21	555	1,400	\$1,265,931
NC Reading Association	3/18-22/22	555	1,400	\$1,265,931
GRAND TOTAL		18,304	14,995	\$15,126,301

SITE VISITS

Group Name	Total Room Nights	Total Attendance
SPORTS MARKETING		
2015 Deep South Classic	7,500	9,000
2015 Rock 'n' Roll Marathon	7,500	18,500
2015 State Games of North Carolina	4,500	14,000
GROUP SALES		
Non-Surgical Hair Restoration Group	2,500	500
Southern Association of School Business Officials	50	23
National GIS Conference	800	500



North Carolina Healthcare Information & Communications Alliance, Inc.	200	300
GROUP TOTAL	23,050	42,823

TRADESHOWS & EVENTS

Event Name	Location (Dates)
SPORTS MARKETING	
NCHSAA Volleyball State Championships	Raleigh (Nov. 1)
CASL visitRaleigh.com NSS Girls Shootout	Countywide (Nov. 8-9)
TEAMS Conference	Las Vegas (Nov. 10-13)
ACC Men's Soccer Championship	Cary (Nov. 14-16)
CASL visitRaleigh.com NSS Boys Shootout	Countywide (Nov. 15-16)
NCHSAA Volleyball Championship	Raleigh (Nov. 15)
NCHSAA Men's Soccer Championships	Raleigh (Nov. 15)
Greater Raleigh Sports Council Steering Committee	Raleigh (Nov. 18)
CASL visitRaleigh.com NSS Girls Showcase	Countywide (Nov. 21-23)
Pop Warner Mid-South Football & Cheerleading	Raleigh, Rolesville (Nov. 27-29)
Nike Cross National Southeast Regional	Cary (Nov. 29)
GROUP SALES	
AENC Annual Golf Outing Committee Meeting	Raleigh, NC (Nov. 3)
AENC Annual Meeting Committee Meeting	Raleigh, NC (Nov. 6)
PCMA Capital Chapter Service 'n Synch	Washington, DC (Nov. 6)
NY MPI Chapter	New York, NY (Nov. 10)
National Coalition of Black Meeting Planners	Cincinnati, OH (Nov. 12-15)
NC SGMP Chapter Meeting	Durham, NC (Nov. 12)
AENC Marketing and Communications Conference	Durham, NC (Nov. 14)
Meeting Professionals International Georgia Chapter-Chapter Meeting	Atlanta, GA (Nov. 18)
PCMA Capital Chapter Annual Meeting	Washington, DC (Nov. 18)
Meeting Professionals International-Carolinas Chapter	Southern Pines, NC (Nov. 20-21)
Nurses Organization Alliance	Tampa, FL (Nov 22-26)