



Tourism Economic Development Report

An official publication of the Greater Raleigh Convention and Visitors Bureau

visitRaleigh.com

MAY 2009

WAKE COUNTY CAPSULE

For the third month of calendar year 2009, Wake County **hotel occupancy tax collections were down 9.6 percent** and **prepared food and beverage tax collections were up 3.4 percent** over 2008.

GROUP SALES

Group sales team members have been digging for leads, and we're coming up roses, with 39 new potential groups looking at Wake County properties. The leads equate to nearly 32 million dollars in economic impact and 49,000 room nights. Over 2.5 million dollars of definite business was signed this month, bringing over 7,300 room nights to the area. Stephen Jackson led a hotel and Convention Center contingency to meet with the regional planner of AKA sorority, Ms Doris Asbury, in Charlotte. They were successful in their attempt to sway Ms. Asbury to bring the July 2010 AKA meeting to Raleigh. Kumi Anzalone represented GRCVB at the D.C Springtime in the Park tradeshow, gleaned a multitude of contacts interested in our City. Malinda Pettaway and Loretta Yingling hosted a luncheon for over 200 GAMPI meeting planners in Atlanta, presenting our video and touting Greater Raleigh as the place to be for their meetings. It was another busy month for site inspections, with team totals at 15 for the month.

SPORTS MARKETING

April 16-19 was one of the busiest sports weekends of the year in Greater Raleigh. Three major events were held here, including the Fila Deep South Classic on the campuses of NC State and UNC, featuring 216 elite girls basketball teams from 33 states; the National Club Softball World Series at Middle Creek Park in Cary; and the ACC Tennis Championships at Cary Tennis Park. Altogether, the three events generated more than 7,000 hotel room nights and nearly \$2 million in direct visitor spending. Greater Raleigh was well represented at the National Association of Sports Commissions annual convention in Denver, where GRCVB officials met individually with 18 event rights-holders and planners who represent potential future sports business for the Raleigh area. NC State University has received the RFP for the 2011-2013 NCAA Men's Basketball Tournaments. NC State will now work with its primary partners, the RBC Center and the GRCVB, to prepare the necessary paperwork and to submit the formal bid by the June 5 deadline. The NCAA is expected to announce its site selections in September. Bookings for April included the 2009 USTA Boys & Girls Southern 12-U Championships, set for June 19-24 at Cary Tennis Park. Jason Philbeck was a guest speaker at NC State University's Facility & Event Management graduate class. Scott Dupree was a guest speaker at the Cary Chamber of Commerce Eye-Opener Breakfast Meeting.

PUBLIC RELATIONS

The Communications Department welcomed three journalists to the Raleigh area this month. **Andrea Oster** a British filmmaker was in the destination to compile footage for a documentary on Blackbeard, **Steve Boggan** from the *London Times* made a stopover in our area while driving to the Outer Banks and **Katherine Brown** on assignment for *Small Market Meetings* toured multiple meeting sites in the area. Details and arrangements were made to host a "Sensory Overload" press



tour in May with six national and freelance journalists attending. *Small Market Meetings*, *Our State*, *Food Network Magazine* and Southwest Airline's *Spirit Magazine* all had feature coverage of the area in their April issues.

SERVICES

We started the month by hosting an educational and recognition program for our Tourism Ambassadors. Forty Ambassadors were in attendance. The program included updates on transportation, tours important marketing tools. Raleigh Rickshaws, RLine, Triangle Gourmet Food Tours, Supershuttle Horse and Carriage Tours did product updates for us and we ended the day with all of us riding The RLine together. Tourism Ambassadors extend GRCVB staffing by an average of 700 hours or more annually (in April alone our Ambassadors worked 157.75 hours). In the way of convention activity, the number of groups serviced is still running ahead of last year and year to date we are 18% ahead of 2008-2009 totals. Groups of note for April included Queens Together Motorcycle Club (with an estimated 3000+ attendees), Future Business Leaders of America (with about 2500 delegates and advisors, and SACAC (Southern Association for College Admission Counseling with 2500 attendees). All the groups were highly visible with many logistical concerns which were well accommodated by our partners. The VIC continues to produce strong numbers for us, and year to date we report the following: 7678 total phone calls, 8289 visitors, 2152 total information requests (email, voice mail and online).
It's a busy, busy time.

MARKETING

In April, the Marketing Department began promoting a new and improved ZSpotCard website (www.zspotcard.com) to help Greater Raleigh convention attendees and leisure visitors better take advantage of the discount card program while here. The department also launched promotions for the "Sensory Overload" May microsite targeting potential leisure visitors. Under publication news, the new Official Visitors Guide to Raleigh, Cary and Wake County is now available on the Web at www.raleighvisitorsguide.com; the print version entered into distribution in early April. Database work is underway to revise and improve the official interactive map of Greater Raleigh, in partnership with Navteq (formerly The Map Network). Marketing staff are also busy finalizing new programs for both leisure visitors and group planners that will launch with the Bureau's new fiscal year in July; attraction and hotel/facility partners are invited to a quarterly update meeting June 3 to learn more. Under advertising, GRCVB ran a sports-related ad in *Sports Events* magazine.



VISITOR INDUSTRY STATISTICAL REPORT APRIL 2009

HOTEL OCCUPANCY PRODUCTION

| | Chg from Mar 08 | Wake County | North Carolina | United States |
|----------------------|-----------------|-------------|----------------|---------------|
| Mar 2009 Occupancy % | -13.3% | 57.3% | 50.1% | 55.2% |
| Mar 2009 ADR | -6.1% | \$82.90 | \$77.28 | \$99.42 |
| Mar 2009 RevPar | -18.6% | \$47.52 | \$38.74 | \$54.93 |
| 2009 YTD Occupancy % | -13.3% | 52.9% | 46.6% | 51.4% |
| 2009 YTD ADR | -4.2% | \$84.07 | \$77.13 | \$100.13 |
| 2009 YTD RevPar | -17.0% | \$44.45 | \$35.91 | \$51.44 |

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

| | March 2009 | 2009 YTD | YTD% Chg from 2008 |
|------------------------|------------|----------|--------------------|
| Passenger Enplanements | 352,945 | 953,248 | -15.8% |
| Passenger Deplanements | 357,601 | 967,264 | -14.9% |

RALEIGH CONVENTION CENTER INFORMATION

| Activity by Year | 2008 | 09 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | Total |
|--------------------|------|----|----|----|----|----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-------|
| HVS | | 9 | 19 | 28 | 33 | 37 | n/a | n/a | n/a | n/a | n/a | n/a | n/a | n/a | n/a | n/a | |
| At RCC (Definite) | 14 | 44 | 33 | 21 | 12 | 10 | 7 | 4 | 2 | 3 | 1 | 1 | | | 1 | 1 | 154 |
| At RCC (Tentative) | - | 2 | 16 | 18 | 15 | 8 | 7 | 4 | 1 | - | - | - | - | - | - | - | 71 |

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

GROUP SALES DEFINITE ROOM NIGHT PRODUCTION

| | April 2009 | YTD | 08/09 YTD Goal | Fiscal YTD +/- Variance |
|-----------------------------|-------------|--------------|----------------|-------------------------|
| Total Room Nights | 6095 | 133,353 | 83,120 | +36% |
| Estimated Economic Impact | \$2,282,520 | \$65,127,923 | \$41,666,667 | +66% |
| Number of Definite Bookings | 9 | 158 | 260 | -39% |

GROUP SALES TENTATIVE ROOM NIGHT PRODUCTION

| | April 2009 | YTD | 08/09 YTD Goal | Fiscal YTD +/- Variance |
|---------------------------|--------------|---------------|----------------|-------------------------|
| Total Room Nights | 49,599 | 378,172,000 | 262,500,000 | +44% |
| Estimated Economic Impact | \$32,744,760 | \$213,649,170 | \$197,170,000 | +8% |
| Number of Tentative Leads | 40 | 455 | 400 | +14% |



SPORTS MARKETING ASSISTED DEFINITE ROOM NIGHT PRODUCTION

| | April 2009 | YTD | 08/09 YTD Goal | Fiscal YTD +/- Variance |
|-----------------------------|------------|--------------|----------------|-------------------------|
| Total Room Nights | 1,289 | 103,638 | 76,664 | + 35% |
| Estimated Econ Impact | \$281,571 | \$27,214,304 | \$24,990,000 | + 9% |
| Number of Definite Bookings | 2 | 56 | 54 | + .04% |

VISITOR SERVICES PRODUCTION

| | April 2009 | FY 08/09 YTD | YTD% Chg from 07/08 |
|---------------------------|------------|--------------|---------------------|
| Number of Groups Serviced | 62 | 359 | +18.0% |

CONVENTION CENTER DEFINITE BOOKINGS

| Group Name | Meeting Dates | Total Room Nights | Total Attendance | Est. Econ. Impact |
|---|---------------|-------------------|------------------|--------------------|
| International World Wide Web Conference | 4/25-1/10 | 3,440 | 1,100 | \$1,040,340 |
| CRSMCA Winter Convention | 1/21-24/13 | 360 | 600 | \$232,335 |
| CRSMCA Winter Convention | 1/20-23/14 | 360 | 600 | \$232,335 |
| GROUP TOTAL (A) | | 4,160 | 2,300 | \$1,505,010 |

GROUP SALES/SPORTS MARKETING ASSISTED DEFINITE BOOKINGS

| Group Name | Meeting Dates | Total Room Nights | Total Attendance | Est. Econ. Impact |
|---|---------------|-------------------|------------------|--------------------|
| USTA Southern 12-U Champ. | 6/19-24/09 | 1,100 | 500 | \$215,400 |
| USA Baseball Labor Day Cup | 9/4-6/09 | 189 | 350 | \$66,171 |
| SPORTS TOTALS (B) | | 1,289 | 850 | \$281,571 |
| Youth Conference | 2/27-1/09 | 250 | 500 | \$145,500 |
| AFL-CIO Southern Region State/CLC Meeting | 2/27-1/09 | 200 | 150 | \$57,900 |
| 2009 Builders Partnership Conference | 4/27-1/09 | 640 | 175 | \$154,860 |
| Triangle Fountain Pen Show | 6/9-14/09 | 175 | 200 | \$125,250 |
| JW Ligon Class of 1960 | 7/2-4/10 | 60 | 125 | \$36,090 |
| Fall Southern Regional Meeting | 10/8-13/10 | 610 | 350 | \$257,910 |
| GROUP SALES TOTAL (C) | | 1,935 | 1,500 | \$777,510 |
| GRAND TOTAL (A,B,C) | | 7,384 | 4,650 | \$2,564,091 |



BIDS SUBMITTED FOR GROUP SALES/SPORTS MARKETING

| Group Name | Dates | Total Room Nights | Attendance | Estimated Economic Impact |
|---|--------------|--------------------------|-------------------|----------------------------------|
| SPORTS MARKETING | | | | |
| 2009 ACC Women's Soccer Champ. | 11/4-8/09 | 1,000 est. | 5,000 est. | \$300,000 |
| 2009 ACC Men's Soccer Champ. | 11/10-15/09 | 1,000 est. | 5,000 est. | \$300,000 |
| GROUP SALES | | | | |
| Black Data Processing Associates - Detroit Contingency | 8/7-8/8/09 | 30 | 60 | \$10,440 |
| Hemophilia Federation of America | 4/13-18/09 | 751 | 500 | \$315,051 |
| NC Association of Marriage and Family Therapy | 11/5-6/09 | 25 | 100 | \$14,550 |
| NC Education Lottery | 9/2-4/09 | 78 | 150 | \$43,992 |
| Powell Family Reunion | 7/10-12/09 | 70 | 175 | \$48,930 |
| Shaw University Raleigh Wake Alumni | 10/22-25/09 | 380 | 200 | \$105,330 |
| The Commanders Ball 2009 | 10/17-18/09 | 10 | 200 | \$25,540 |
| NC Dept of Ag - Cooking Carolina | 8/6-8/10 | 200 | 2,000 | \$490,800 |
| Novo Nordisk | 1/14-21/10 | 5,706 | 2,600 | \$2,042,901 |
| US Office of Government Ethics | 5/1-7/10 | 2,710 | 600 | \$626,010 |
| Amer Society of Agricultural and Biological Engineering | 6/24-30/11 | 2,940 | 1,750 | \$1,303,920 |
| American Massage Therapy Assn | 10/3-6/12 | 2,185 | 1,100 | \$1,206,735 |
| American Society for Photogrammetry & Remote Sensing | 3/23-30/12 | 1,430 | 1,200 | \$1,026,480 |
| CALEA | 7/17-22/12 | 2,000 | 1,000 | \$813,000 |
| Queens Together 2012 | 4/7 - 9/12 | 1,230 | 2,500 | \$951,030 |
| American Association for the Advancement of Science | 2/9-17/14 | 7,000 | 9,000 | \$8,449,800 |
| Association of Science-Technology Centers | 10/14-22/14 | 2,946 | 2,000 | \$1,897,326 |
| American Association for the Advancement of Science | 2/8-16/15 | 7,000 | 9,000 | \$8,449,800 |
| GRAND TOTAL | | 38,691 | 44,135 | \$28,421,635 |

SITE VISITS

| Group Name | Total Room Nights | Total Attendance |
|--|--------------------------|-------------------------|
| GROUP SALES | | |
| American Chemical Society | 1,200 | 600 |
| Dry Scrubber Users Assn | 160 | 340 |
| HCL Amer | 80 | 60 |
| Huntington's Disease Society | 995 | 300 |
| Meredith College Women's Leadership Summit | 60 | 300 |



| | | |
|------------------------------|---------------|---------------|
| Music Educators | | |
| NACA | 1,090 | 330 |
| Natl Corvette Cncl | 700 | 350 |
| Natl Reading Society | 1,700 | 1,300 |
| Natl Realtor's Assn | Not available | Not available |
| Small Meetings Magazine | Not available | Not available |
| Universal Meeting Management | 160 | 340 |
| Water Environment Federation | 850 | 500 |
| GROUP TOTAL | 4,785 | 2,980 |

TRADESHOW & EVENTS

| Event Name | Location (Dates) |
|---|-------------------------------------|
| SPORTS MARKETING | |
| NCAA Women's Gymnastics Regional | Raleigh (April 4) |
| Greater Raleigh Sports Council Steering Committee | Raleigh (April 16) |
| National Club Softball World Series | Cary (April 16-18) |
| Deep South Classic | Raleigh & Chapel Hill (April 16-19) |
| ACC Tennis Championships | Cary (April 16-20) |
| Cary Chamber Eye Opener Breakfast | Cary (April 22) |
| National Association of Sports Commissions | Denver (April 27-29) |
| GROUP SALES | |
| PMPI Meeting | Landsdowne, VA (Apr. 2) |
| AENC Chapter Luncheon | Raleigh, (Apr. 3) |
| GRCVB Ambassador Appreciation | Raleigh, (Apr 7) |
| NC SGMP Chapter and Board meetings | Durham, (Apr 8) |
| AENC Nominating Committee Meeting | Raleigh, (Apr 9) |
| Time Fore Nine | Fairfax, VA (Apr 13 & 22) |
| AMPS monthly meeting | Washington DC (Apr 14) |
| PMPI Luncheon | Washington DC (Apr 15) |
| Springtime in the Park | Washington DC (Apr 16) |
| AENC Women's Golf Day | Raleigh, (Apr 16) |
| GAMPI Meeting | Atlanta, (Apr 21) |
| PMPI Board Meeting | Washington DC (Apr 23) |
| CVB Reps Quarterly Meeting | Washington DC (Apr 29) |
| MPI-CC Board Orientation | Chapel Hill (Apr 30) |