

## **Executive Summary**

### **Methodology**

Randall Travel Marketing was hired by the Greenbrier County Convention & Visitors Bureau (GCCCVB) to conduct Phase I and II of an overall comprehensive travel and tourism research study.

#### **Phase 1:**

##### **1. Initial Meeting and Materials Gathering:**

Initial meetings were conducted between GCCVB and Randall Travel Marketing (RTM) professionals in order to review questionnaires, gather input and collect marketing materials and other pertinent information.

##### **2. Reconnaissance Trip:**

A professional reconnaissance team visited the Greenbrier County area July 7 - 10, 2005. The region was fully evaluated from the perspective of the tourist. The Reconnaissance Team findings are documented in this report with summary recommendations.

##### **3. Lodging Property Survey:**

A confidential survey was sent to every area lodging properties. RTM asked for a confidential report from these properties regarding their market mix (percentage of total rooms booked by market segment including business, convention, group, leisure, etc.). We will also ask their occupancy by month, top feeder markets, and Average Daily Rate (ADR). A final report with an analysis of their combined responses was developed.

##### **4. Performance Audit and Current Status:**

RTM conducted an in-depth review of the performance of the GCCVB including governance, funding, budgeting, staff structure, program of work, and results measures. A written report documenting that study is included in this report.

##### **5. Recommendations (Based on Phase I):**

Recommendations based on our research in this phase of the study were prepared and are a part of this report.

#### **Phase II:**

##### **6. Visitor Mail Survey:**

1,000 4-page surveys were mailed the week of January 16, 2006 to a stratified random sample pulled from a one-year database of inquiries received by the Greenbrier County Convention and Visitors Bureau. A total of 122 surveys (12.20%) was accomplished, which is in the acceptable response range of 10% to 15% for surveys of this method. The survey contained forty-one (41) questions. Each question asked is stated in this report with the responses documented and interpreted.

##### **7. Recommended Strategies (Based on Phase I and II):**

Comprehensive recommendations based on Phase I findings and the Phase II results of the Mail Survey were developed.

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### **Summary of Team's Phase I Findings and Observations**

- The region is quite scenic and there are a good number of attractions and things to see and do as well as wonderful outdoor areas.
- The destination is in a good location with interstate access, and has strong geographic feeder markets.
- Gateways are inadequate...there is little that creates a sense of place.
- The Visitor Center is in a poor location and needs to provide a better orientation. The CVB offices are inadequate to the task.
- While the lodging product is good, more lodging properties in the higher-quality limited service level are needed. There are no full-service lodging properties other than The Greenbrier.
- Lodging properties with on-site meeting facilities are needed. The supply is limited and not the preferred type of meeting facilities. This severely limits the GCCVB's ability to recruit small meetings and groups.
- There are sufficient attractions in the area to warrant leisure visits.
- The CVB needs to conduct monthly lodging market segment surveys in order to accurately identify and manage growth on a monthly basis.
- The CVB is doing a good job, but is under-staffed.
- Occupancy tax funding needs to be accurately tracked to ensure compliance with West Virginia tax codes and return-on-investment.
- The Greenbrier is a most fortunate asset.
- Lewisburg has a charming downtown area with a good variety and amount of shops and restaurants.
- The smaller towns have good "bones" but more development is needed.
- There is excellent "shopper-tainment" in Lewisburg and other areas but hours of operation are a problem, and there is too much repetition of merchandise.
- A variety of quality dining exists. The major issue is lack of Sunday dining.

### **Lodging Study**

Randall Travel Marketing (RTM) conducted a survey of the hotels, motels, and inns located in Greenbrier County, WV. A one-page questionnaire was mailed to each lodging property to determine the percentage of occupancy driven by twelve market segments, annual occupancy percentages, percentage of walk-in reservations, and top leisure feeder markets. The survey was conducted during the months of July and August, 2005. The Greenbrier data was suppressed in some areas of this report because it accounts for 56% of the 1428 rooms listed in the GCCVB's marketing materials and will skew the report's findings.

The hotel data for 2003 was reported by seven (7) properties, representing 58.14% of the 482 rooms available in 2003 (backing out The Greenbrier). The response rate for Bed and Breakfast Inns was not statistically significant and therefore RTM will not be reporting on this segment. Hotel data for 2004 was reported by ten (10) properties representing 67.23% of the 542 rooms available (backing out The Greenbrier). RTM has tabulated the data as reported by these properties. The charts on the following pages outline the overall findings from the lodging properties that responded to the survey.

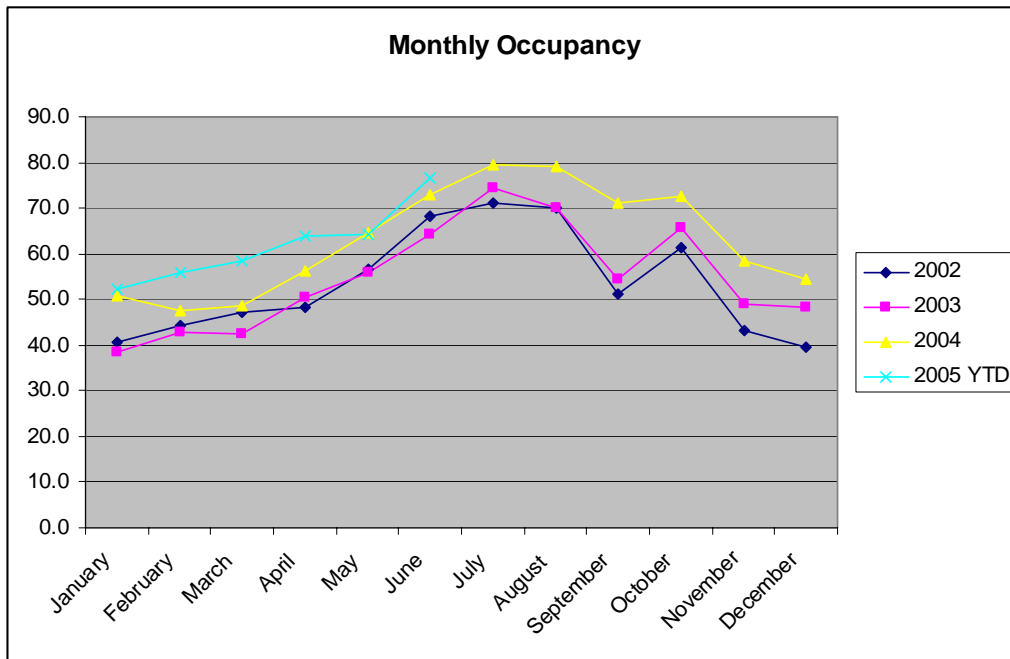
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Greenbrier County currently has twelve (12) hotel lodging properties collecting the local lodging tax. According to Smith Travel Research, the twelve properties have a total of 1314 rooms. Seven (7) of the lodging properties are franchised through national chains, five (5) are privately owned. The GCCVB currently reports thirteen (13) bed & breakfast style inns that also collect the lodging tax.

### Estimated Annual Overall Hotel Market Mix

2004	Category
67.0%	<b>Overall Percentage of response rate</b>
24.74%	<b>Individual Corporate/Business Travelers</b>
21.69%	<b>Leisure – tourists visiting local attractions, shopping etc.</b>
17.53%	<b>Leisure – visiting friends &amp; relatives, weddings, reunions</b>
12.10%	<b>Transient – pass through as part of a longer trip</b>
11.98%	<b>Other (relocation, biking trails, long term)</b>
3.72%	<b>SMERF Meetings &amp; Groups (social, military, educational, religious, fraternal)</b>
3.64%	<b>Sports Groups, Tournaments, Events</b>
1.90%	<b>Corporate Meetings</b>
1.29%	<b>Government Meetings/Groups</b>
0.72%	<b>Golf Package or Golf Group</b>
0.46%	<b>Association Meetings</b>
0.23%	<b>Group Tour/Motorcoach</b>

(Source: RTM Greenbrier County Lodging Survey)

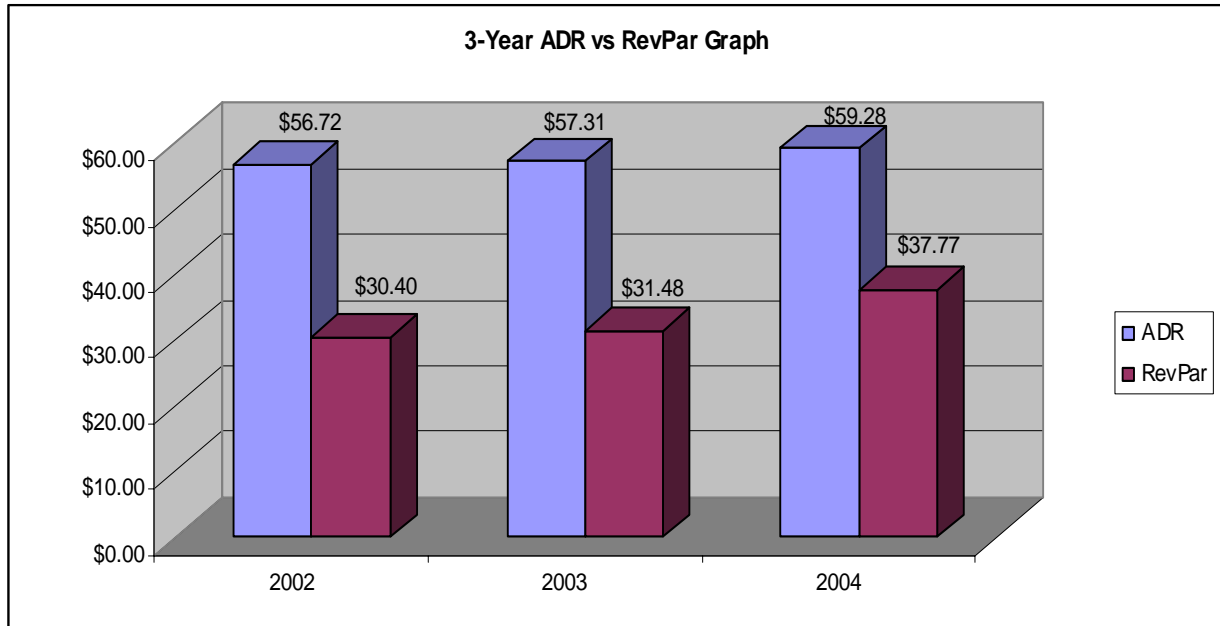


(Source: Smith Travel Research STR Report)

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### Average Daily Rate (ADR) and RevPar

The chart below reveals that lodging properties are increasing RevPar (Revue Per Available Room) while also increasing the ADR (Average Daily Rate). As demand has increased, hoteliers have been able to raise rates while also maintaining a positive RevPar trend. This is excellent and indicates real net growth.



(Source: Smith Travel Research STR Report)

### Performance Audit

#### Greenbrier County Tourism Impact and Tax Relief Statistics

Analysis of the 2004 economic impact of travel and tourism in Greenbrier County shows the significant and consistent financial impact that visitors leave in the community. The figures below show the amount of tax revenue that is generated by visitors to the area, thus relieving residents of some of the tax burden of maintaining the local infrastructure. The economic impact of travel and tourism in Greenbrier County, WV is as follows:

#### 2004 - Economic impact of travel and tourism

\$231,000,000	Total domestic travel expenditures 2004*
\$1,638,000	Local taxes collected*
\$15,385,000	State taxes generated by Greenbrier County tourism*
\$17,023,000	Total amount of taxes driven by Greenbrier County tourism*
2,540	Number of jobs created in Greenbrier County due to tourism*
34,886	Population of Greenbrier County**
18,140	Households in Greenbrier County**
<b>\$488</b>	<b>Tourism Tax Relief per resident of Greenbrier County ***</b>
<b>\$938</b>	<b>Tourism Tax Relief per household in Greenbrier County***</b>

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\* West Virginia Division of Tourism, June 2005 study title: *Economic Impact of Travel in West Virginia* by Dean Runyan Associates

\*\* US Census Bureau

\*\*\*Tourism Tax Relief was determined by RTM by adding the state and local taxes generated by tourism in Greenbrier County and then dividing that total by the number of households and by the 2004 population.

### GCCVB Funding

#### Greenbrier County and Cities Room Lodging Tax Collection History

<i>Fiscal Year</i>	County Lodging Tax Revenue	% Change	Cities Lodging Tax Revenue	% Change
2002-03	\$1,534,614		\$124,696	
2003-04	\$1,422,276	-7%	\$137,732	10%
2004-05	\$1,434,470	.01%	\$157,666	14%

In compliance with the West Virginia Tax Code, the GCCVB is funded with 50% of the 3% occupancy tax collections in Greenbrier County and the Cities of Lewisburg, White Sulphur Springs and Rainelle.

Hotel Occupancy Tax Collected	FY05	% of Tax	FY04	% of Tax	FY03	% of Tax
Greenbrier County 3% Tax	\$1,434,470	100%	\$1,422,276	100%	\$1,534,612	100%
Funding to GCCVB	\$717,235	50%	\$711,138	50%	\$767,307	50%
Lewisburg 3% Tax	\$149,696	100%	\$125,456	100%	\$112,430	100%
Funding to GCCVB	\$74,848	50%	\$62,728	50%	\$56,215	50%
White Sulphur Springs 3% Tax	\$6,500	100%	\$10,466	100%	\$10,502	100%
Funding to GCCVB	\$3,250	50%	\$5,233	50%	\$5,251	50%
Rainelle 3% Tax	\$1,468	100%	\$1,812	100%	\$1,764	199%
Funding to GCCVB	\$735	50%	\$906	50%	\$882	50%
<b>TOTAL Taxes Collected</b>	<b>\$1,592,136</b>	<b>100%</b>	<b>\$1,560,008</b>	<b>100%</b>	<b>\$1,659,310</b>	<b>100%</b>
<b>Total Funding to GCCVB</b>	<b>\$796,068</b>	<b>50%</b>	<b>\$780,004</b>	<b>50%</b>	<b>\$829,655</b>	<b>50%</b>

According to the International Association of Convention and Visitors Bureaus (IACVB), the average percentage of room tax collections most destinations allocate to the local CVB is 65%. At 50% of the total tax collections, Greenbrier County is placing a heavy burden upon its CVB. Unless funding is increased, the CVB will struggle to compete with other destinations.

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### Greenbrier County CVB Expenditure Analysis

The following charts show the three major areas of the GCCVB budget as a percentage of its total budget and the GCCVB total budget as a percentage of the total room occupancy tax collected.

#### Percentage of Total CVB Budget\*

Budget Category	2004-05		2003-04		2002-03	
Salaries & Benefits	\$205,390	21%	\$208,625	21%	\$213,990	21%
Operating Expenses	\$155,304	16%	\$191,215	19%	\$216,170	22%
Outreach	\$611,470	63%	\$590,760	60%	\$574,260	57%
<b>TOTAL BUDGET</b>	<b>\$972,164</b>	<b>100%</b>	<b>\$990,600</b>	<b>100%</b>	<b>\$1,004,420</b>	<b>100%</b>
<b>50% of Occupancy Tax</b>	<b>\$796,068</b>		<b>\$780,004</b>		<b>\$829,655</b>	

A review of the three basic budget categories for Greenbrier County (Salaries & Benefits, Office Expenses and Outreach) reveals that the GCCVB is spending the money it receives appropriately. In evaluating this, one needs to compare these figures directly to the standards set by the International Association of Convention and Visitors Bureaus. According to IACVB, salaries and benefits should fall within a 25-40% range of the total occupancy tax collections. Here we see that in the 2004-2005 fiscal year, the GCCVB spent only 21% of its *budget*.

#### Greenbrier County CVB Actual Revenue for FY 2004- 2005

Income Category	Income	% Of whole
Hotel Tax - County	\$717,235	76.3 %
Hotel tax - Lewisburg	\$74,848	7.96%
Hotel Tax - WSS	\$ 3,250	.34%
Hotel Tax - Rainelle	\$ 735	.07%
Advertising Grant	\$ 126,888	13.49%
Other Income	\$170	.01%
State Co-op ads	\$7,750	.82%
Greater Greenbrier Chamber	\$2,200	.23%
Ad Sales - VG	\$5,155	.54%
Interest Income	\$1,694	.18%
<b>Total Revenue</b>	<b>\$ 939,925</b>	<b>100.00%</b>

**Executive Summary****Greenbrier County CVB Inquiries Collection History\***

<b>Type of Inquiry</b>	<b>2004</b>	<b>2003</b>	<b>2002</b>
Purchased Advertising - Print	\$225,000	\$235,000	\$235,000
Direct Mail	\$15,000	\$0	\$0
Online	\$5,000	\$0	\$0
<b>Total Cost</b>	<b>\$245,000</b>	<b>\$235,000</b>	<b>\$235,000</b>
Number of Inquiries - Print	27,256	23,556	41,000
Number of Inquiries - Web	33,197	19,264	N/A
Number of Inquiries - Phone	8,155	5,732	2,800
Number of inquiries - Direct Mail	N/A	N/A	N/A
<b>Total Number of Inquiries</b>	<b>68,608</b>	<b>48,552</b>	<b>43,800</b>
<b>Cost Per Inquiry</b>	<b>\$3.57</b>	<b>\$4.84</b>	<b>\$5.34</b>

\* *Greenbrier County 2004-05 Marketing Plan*

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<b>Respondent Profile and Responses</b>		<b>2006 Mail Survey</b>	
<b>Demographics:</b>			
Average Age			52.7
Gender: Male/Female			Male=39%/Female=61%
Occupation			Retired, educator, homemaker, sales, professional
Point of Origin			PA, VA, NY, MD, OH, NJ, NC, WV
Travel party			86% adults only (2.24 adults) / 14% adults with kids (1.50 kids)
<b>Generations:</b>			
War Generation (80+)			0.88%
Silent Generation (62-79)			21.93%
Baby Boomer (44-61)			50.00%
GenX (23-43)			27.19%
GenY (4-22)			0.0%
<b>Characteristics:</b>			
Had visited Greenbrier before			39.78%
Conversion			27.47%
Repeat visit			50%=previous visitors converted
First visit			12.50%=first time visitors converted
Source of inquiry			WV State travel guide, GCCVB visitor guide, Travel feature stores, <i>Southern Living</i> , <i>AAA Tour Book</i> , GCCVB website, WV website, <i>Travel &amp; Leisure</i> , <i>Country Living</i>
How far in advance did you plan?			35.71% planned within a month
Average length of stay			2.11 nights
Trip days			43%=weekend getaway; 29%=weekday getaway; 14%=day trip; 14%=vacation (4+ nights)
Main trip purpose			40%= vacation/getaway, 10%=romantic; 7%=VFR, 7%=hiking
Lodging type			59.26%=hotel/motel, 15% rental, 7%=camp, 7%=VFR, 4%= B&B
Overnight at The Greenbrier			7.69%=yes, 92.31%=no
Auto trip or fly/drive			83%=auto, 10%=camper/RV, 3%=motorcycle, 3%=fly/drive
Activities			Dining, shopping, visit state park, driving/sightseeing, sleep late/nap, visit historic site
Liked most about Greenbrier			Scenery/ beauty/mountains, friendly people, hiking
Liked least about Greenbrier			Roads, traffic
Overall satisfaction	<b>4.33</b>	<b>What words comes to mind?</b>	
Overall appeal of the attractions	4.22	Scenic/scenery, beautiful/beauty, history, peaceful	
Level of service/employee training	4.22		
Ease of finding visitor information	4.18	<b>Most desired new products:</b>	
Quality of the lodging rooms	4.17	Craft/artisan co-op w/hand-made items in the historic district	38.52%
Convenience of parking	4.11	Guided history tour in Lewisburg	35.25%
Signage and wayfinding	4.07	Guided nature excursions	33.61%
Range of choices for dining	3.96	Antique trail	32.79%
Lodging value for price paid	3.91	More fine dining	27.05%
Variety of shopping & merchandise	3.85	Touring guide book w/matching CD	27.05%
Outdoor recreation this trip?	36.36%	More lodging options	26.23%
Attend cultural event this trip?	20.45%	Interpretive center - coal mining & lumber	22.95%
		Farm heritage tours	22.95%
		Nighttime entertainment	22.13%

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Type of retail that appeals most to respondents:			
Made in West Virginia items	60.66%	Shoes & purses	23.77%
Antiques	57.38%	Furniture & home furnishings	22.95%
Collectibles	52.46%	Kitchen & dining	22.13%
Clothing	39.34%	Fine art	19.67%
Books & music	33.61%	Contemporary fine art crafts	19.67%
Garden and patio	31.97%	Electronics	13.11%
Jewelry and accessories	27.87%	Children's clothing & toys	9.02%
Housewares & décor	26.23%	Other (specify)	5.74%
Health & beauty (soaps, bath products, etc.)	25.41%		
Outdoor recreation equipment / outfitter	25.41%		
<b>Would you participate in themed walking tours? 75.86%=yes / 24.14%=no</b>			
Civil War	76.14%		
Ghost tours	50.00%		
Pre-Civil War	45.45%		
Pre-Revolutionary War / Colonial	45.45%		
Pre-20 <sup>th</sup> Century	32.95%		
1900-1950	25.00%		
1950 to present	23.86%		
Black history	17.05%		

**Primary activities sought when planning long weekend trip:**

- Dining
- Relaxing
- Shopping
- Hiking
- Sightseeing
- History

**Average Daily Spending and Tax Collections**

<u>Category</u>	<u>Amount</u>	<u>% of whole</u>	<u>3% Occ. Tax</u>	<u>6% State Sales Tax</u>
1. Lodging	\$99.41	37.82%	\$2.98	\$5.96
2. Food/meals	\$49.37	18.78%		\$2.96
3. Shopping	\$47.28	17.99%		\$2.84
4. Attractions/amusements	\$40.28	15.33%		\$2.42
5. Transportation	<u>\$26.51</u>	<u>10.09%</u>		<u>\$1.59</u>
<b>Average Daily Expense</b>	<b>\$262.85</b>	<b>100.00%</b>	<b>\$2.98</b>	<b>\$15.77</b>

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### Strategic Direction

The definition of tourism is “*putting visitors in front of cash registers.*” Greenbrier County has an excellent opportunity to increase the revenues generated by tourism while not overburdening its existing infrastructure. RTM recommends the following strategies to achieve this balanced growth:

- A. *Adopt a market segmentation approach for overall strategic tourism marketing growth.*** Leaders of the Greenbrier County area must understand the current tourism environment and the value of each market segment currently visiting Greenbrier County. The current market segmentation is:

2004	Category
67.0%	Overall Percentage of response rate
24.74%	Individual Corporate/Business Travelers
21.69%	Leisure – tourists visiting local attractions, shopping etc.
17.53%	Leisure – visiting friends & relatives, weddings, reunions
12.10%	Transient – pass through as part of a longer trip
11.98%	Other (relocation, biking trails, long term)
3.72%	SMERF Meetings & Groups (social, military, educational, religious, fraternal)
3.64%	Sports Groups, Tournaments, Events
1.90%	Corporate Meetings
1.29%	Government Meetings/Groups
0.72%	Golf Package or Golf Group
0.46%	Association Meetings
0.23%	Group Tour/Motorcoach

- B. *Understand the true benefit of tourism to the Greenbrier County area is in the growth of per-visitor expenditures, as well as growing the volume of visitors.*** Greenbrier County leaders need to clearly understand what drives growth in tourism economic impact. It is the *growth in per-visitor expenditures*, as well as growth in *lodging revenues* that creates success.

<u>Category</u>	<u>Amount</u>	<u>% of whole</u>	<u>3% Occ.Tax</u>	<u>6% State Sales Tax</u>
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It is clearly seen in the above chart that it is the 6% sales tax that generates the greatest benefit for residents of Greenbrier County. Increasing per-visitor expenditures increases the benefit of tourism to state residents and it increases the tax relief that provides the greatest benefit.

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- C. *Better gateways and a more effective visitor center on Interstate 64 at Exit 169 are critical priorities. Improved orientation and facilitation of visitors is required to drive greater expenditures.*** Better gateways and a more effective visitor center are a critical priority. RTM firmly believes that a powerful gateway “showcase and sales center” for Greenbrier County attractions and amenities would result in better economic impact. In this study 82.76% of respondents reported they stop at visitor centers frequently or fairly often looking for things to do and places to stay when in an area. Additionally, visitors expressed low satisfaction with dining and shopping options in Greenbrier County. The gateways should include the following:
- Architectural style that matches the persona of the area.
  - Nighttime illumination.
  - Attractive landscaping.
  - The positioning statement on the sign under the “Welcome” wording.
  - Directions leading travelers to visitor information.
- Additionally, a new location is needed that will allow the visitor center to become an appropriate “sales center” for the entire county.
- D. *Improve signage and wayfinding for Greenbrier County and make it as easy as possible to find visitor information, attractions and amenities.*** RTM strongly recommends that new signage and wayfinding be planned and installed as soon as possible.
- E. *Increase funding and staffing for Greenbrier County CVB to compliment new strategic plan:*** The West Virginia Tax Code states that a minimum of 50% of all occupancy tax collections in Greenbrier County and the towns of Lewisburg, White Sulphur Springs and Rainelle are to be allocated to the Greenbrier County CVB. The remainder that is not allocated to the CVB is retained by the collecting jurisdiction, but there are stringent stipulations as to how those funds are to be spent. Thus, the CVB receives 50% of the total occupancy tax collected in the Greenbrier County area. Unfortunately, this does not match national standards. According to the Destination Marketing Association International (DMAI) this is inappropriate to the task. Nationally, the standard is that destination staffing for marketing should be the equivalent of 25-40% of the total tax collected. This puts Greenbrier County in a dilemma. Increased results cannot reasonably be expected without appropriate investment. RTM recommends that Greenbrier County Commission review the strategic plan of the CVB and a task force be appointed to monitor the total occupancy tax funds and their allocation and to address increasing the funding to the CVB over the next five years to bring the total investment to 75% of the total occupancy tax collected.
- F. *Adjust marketing materials to improve conversion and visitor satisfaction.*** RTM has provided detailed recommendations for the improvement of the tourism marketing materials, advertising and public relations to drive increased visitation.
- G. *Hire a sports marketing consultant to examine potential for competitive sports tourism:*** The competitive sports segment of tourism has grown dramatically in the past few years. Many destinations are eagerly working to develop facilities that will drive this market segment. An excellent use of the 50% of the occupancy tax funds that are retained by the jurisdictions in Greenbrier County would be to hire a sports tourism consultant who can effectively evaluate the existing sports facilities in the county, compare Greenbrier County to others, and help determine which sports may be under-served and a good potential for the area. Soccer, baseball, softball, archery, tennis, track and field, and many other sport segments should be evaluated.

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**H. Use data in this report to help retailers understand what is desired by visitors and provide ideal product mix for greater visitor spending.** Currently, retail spending is the third largest category of expenditures for visitors to Greenbrier County. The goal is to increase retail spending to become the largest category of expenditures. However, local merchants must be willing to partner with the GCCVB in these efforts or success is unlikely.

**I. Monitor and manage visitor satisfaction with crucial components of visitor activity.**

Currently, amenities in the Greenbrier County area are rated thusly by visitors:

<b>Amenity</b> (on a 1 – 5 scale where 1=low and 5=high)	<b>Avg.</b>
The overall appeal of the attractions in the area	4.22
Level of service/employee training	4.22
Ease of finding visitor information	4.18
Quality of the lodging rooms	4.17
Convenience of parking	4.11
Signage and wayfinding	4.07
Range of choices for dining	3.96
Lodging value you received for price paid	3.91
Variety of shopping & merchandise	3.85

All ratings that fall below a 4.00 are not acceptable. Clearly, the range of choices for dining, the lodging value for price paid, and the variety of shopping and merchandise must be addressed and monitored for improvement.

**J. Enhance existing products, attractions and activities to meet visitor expectations and develop new products.** Some of the products that tested highly under “unmet needs” are things that Greenbrier County already has. Thus, it is clear that the customer is saying to improve and more aggressively promote existing products, enhance those already in development and also add new ones. The products recommended for enhancement and development includes:

- A craft/artisan co-op featuring hand-made items in the historic district.
- Seasonal guided history and ghost tours in Lewisburg
- Seasonal guided nature excursions
- Antiques shopping trail and expo
- More fine dining
- A touring guide book with matching CD
- More lodging options (especially in the mid-price and full-service range)
- More places to sit and rest in historic districts
- Seasonal festivals and events to build slow visitation periods
- Encourage shop owners to open in evening hours
- Hire a sports marketing consultant to help determine most profitable sports facilities
- Continue developing Lewisburg, White Sulphur Springs, Rainelle, Alderson and other towns in Greenbrier County into *lively* and animated village style shopping, dining and entertainment districts.

**K. Conduct on-going scientific research to determine efforts earning the best return-on-investment**

- Monthly lodging market mix survey
- Visitor profile and conversion research every three years
- Annual evaluation of inquiry point-of-origin
- Website visitor interest and conversion analysis
- Inquiry database “data mining”