DEMystifying the world of data aggregation

August 14, 2021
What is Data Aggregation?

- Process of gathering information from multiple data sets and combining and presenting it in a summarized and visualized format for insights analysis.

- Create a tool useful for everything from marketing, sales, and destination management decisions and strategies to stakeholder and community engagement and advocacy efforts.
Why now?

- **Demand** - Pandemic accelerated the need for timely and actionable data and information

- **Supply** - Cacophony of noisy data

- **Ability** - Technology and skills is available to pipe in, consolidate and visualize data

- **Result** - Several data aggregation platforms to choose from
What are DMO’s data aggregation objectives?

- Provide a holistic view of the DMO in a single platform that integrates data sets and KPIs

- Break down the internal silos of and data
  - Marketing KPIs
  - Sales performance
  - Lodging metrics
  - Geolocation data
  - Economic data

- Elevate DMO’s profile by demonstrating that strategies are grounded in data and KPIs are measured
  - Establish the DMO as the local market expert
  - Educate and inform stakeholders and elected officials
Shift the research staff from moving around data to thinking and analytic role
USTA Recovery Tracker

Data Sources and Partners

The U.S. Travel Association and its members wish to thank each of these organizations for their generous contributions of valuable data and insights to the U.S. Travel Recovery Tracker.

- Longwoods International
- Destination Analysts
- simpleview
- GBTA
- TravelClick
- AIRDNA
- UberMedia
- Tempest
- STR
- MMGY Global
- AIRLINE DATA INC
- OAG
- BLS
- THE CONFERENCE BOARD
- ARRIVALIST
- CVENT
- CDC
- COMPASS

Determine the aggregation platform objectives i.e. provide the industry with data needed to pace, evaluate and plan for recovery.

Inventory your data sources bringing in new ones as needed and eliminating any that become irrelevant.
Travel Recovery Indicators
United States, June 2021 % change relative to same month in 2019

- Auto Trips (Arrivalist): -5%
- Air Passengers (TSA): -26%
- Overseas Arrivals (NTTO): -77%
- Hotel Demand (STR): -9%
- Short-term Rental Demand (AIRDNA): 9%

Insights
The travel recovery accelerated in June, as widespread vaccine availability, strong household finances, and elevated private sector optimism supported strong domestic travel growth.

Air passenger volume registered 26% below June 2019 levels. Emblematic of the lagging recovery of business travel, weekday air passenger volume (-28%) trailed weekend air passenger volume (-22%). Overseas travel, while still severely inhibited by border restrictions, moderately improved to 77% below 2019 volumes in June.

Auto travel registered 5% below its 2019 level in June, a slight regression from May. Similarly, short-term rental demand slid relative to May, yet remained 9% above its 2019 level.

Hotel room demand improved to 9% below its 2019 level in June though the recovery is uneven and regional. Florida experienced a 2% improvement over 2019, whereas New York remained 30% below its pre-pandemic benchmark.

National Park Visits
Person visits, % change relative to 2019

Art Museum Attendance
Out-of-town visitors as share of total visitors

Source: National Park Service
**Insights**

Organic search sessions on Destination Organization (DMO/CVB) websites surged to 21% above 2019 levels in June and remained strong through the first 25 days of July, posting a 22% gain relative to 2019.

Actual DMO/CVB group bookings finalized in June fell to 66% of their 2019 level.

Group room night pace for future dates slipped slightly in July, with 2021 Q4 pace falling to 79% of 2019 levels in July from 80% in June.

**Website Traffic**

Organic search sessions to DMO/CVB websites, 7-day moving average

Source: Simpleview (250+ U.S. DMOs)

**DMO/CVB Group Bookings**

Hotel room nights contracted during most recent months

% change from 2019

Source: Simpleview CRM (250+ U.S. DMOs)

**US DMO/CVB Group Room Night Pace**

Pace for future dates, relative to the same period in 2019

Source: Simpleview CRM (250+ U.S. DMOs)

**DMO/CVB Room Nights on the Books**

Pace for future dates, relative to the same period in 2019

Source: Simpleview CRM (250+ U.S. DMOs)
US Economic Outlook

Oxford Economics July 2021

An improved health situation, strong household finances and elevated private sector optimism will support robust economic momentum this summer, but the US economy is likely past peak growth and peak inflation. Factoring modestly slower consumer spending activity and cooler residential investment, we have revised down our GDP forecast to 7% in 2021 (from 7.7% previously), still the strongest since 1984, and 4.3% in 2022. Risks to the outlook appear balanced with upside risks from increased consumer spending out of savings offsetting downside risks from the Delta coronavirus variant.

The great consumer spending rotation gathered steam in May as households shunned now-expensive goods in favor of once-familiar services. Strong fundamentals continue to underpin consumer spending, which we foresee growing around 8.9% this year – the strongest rate since WWII.

The labor market added 850k jobs in June. This strong performance – despite persistent hiring strains – should mark the beginning of a series of stellar reports that will lead to the addition of 8 million jobs in 2021.

We think an inflation regime shift is unlikely. But after a decade of glacial price rises in the wake of the financial crisis, the economy will experience a prolonged period of warm inflation above the Fed’s 2% target. That stickiness will initially reflect post-Covid supply and demand imbalances, but from 2022 onward will be driven by sustained economic and labor market strength.

Gross Domestic Product (GDP)
Real, seasonally adjusted, index (2019 Q4 = 100)

Unemployment Rate
Seasonally adjusted

Consumer Spending
Real, annual growth

Business Investment
Real, annual growth

Source: BEA; Oxford Economics
Data Strategy

1. Where do they come from?
2. Who are they?
3. What do they do?
4. Did it work?
Where do they come from?
### All Top Markets Have Strong Overnight Visitation

<table>
<thead>
<tr>
<th>Location</th>
<th>Day Trip</th>
<th>Long Day Trip</th>
<th>Overnight Stay</th>
<th>Short Trip</th>
</tr>
</thead>
<tbody>
<tr>
<td>San Antonio, TX</td>
<td>10.64%</td>
<td>58.06%</td>
<td>12.86%</td>
<td>18.44%</td>
</tr>
<tr>
<td>Austin, TX</td>
<td>8.54%</td>
<td>64.49%</td>
<td>13.12%</td>
<td>13.85%</td>
</tr>
<tr>
<td>Houston, TX</td>
<td>12.24%</td>
<td>56.02%</td>
<td>12.56%</td>
<td>19.18%</td>
</tr>
<tr>
<td>Dallas-Ft. Worth, TX</td>
<td>8.66%</td>
<td>64.88%</td>
<td>12.55%</td>
<td>13.91%</td>
</tr>
<tr>
<td>Corpus Christi, TX</td>
<td>28.73%</td>
<td>32.87%</td>
<td>9.92%</td>
<td>28.48%</td>
</tr>
<tr>
<td>Waco-Temple-Bryan, TX</td>
<td>8.25%</td>
<td>64.6%</td>
<td>13.1%</td>
<td>14.05%</td>
</tr>
<tr>
<td>Harlingen-Weslaco-Brownsville-McAllen, TX</td>
<td>15.82%</td>
<td>48.75%</td>
<td>12.65%</td>
<td>22.78%</td>
</tr>
<tr>
<td>Odessa-Midland, TX</td>
<td>9.28%</td>
<td>60.35%</td>
<td>12.17%</td>
<td>18.2%</td>
</tr>
<tr>
<td>Victoria, TX</td>
<td>20.69%</td>
<td>38.67%</td>
<td>11.45%</td>
<td>29.2%</td>
</tr>
<tr>
<td>Abilene-Sweetwater, TX</td>
<td>69.5%</td>
<td>11.42%</td>
<td>13.27%</td>
<td></td>
</tr>
</tbody>
</table>

**Location - Visitor Count**

- **Day Trip**
- **Long Day Trip**
- **Overnight Stay**
- **Short Trip**
Short-Term Rental Origins
TERMINAL AUDIENCE MODELING

Sun Seekers: 18% of total households
Unbound Urbanites: 25% of total households
Roaming Boomers: 21% of total households
Texas Trippers: 21% of total households
Income Level
Travel Spend
Where do they go?
Top POIs* - All Visitor Trip Types

1. South Packery Channel Beach
2. Padre Island National Seashore
3. Mustang Island State Park
4. Texas State Aquarium
5. Doc's Seafood and Steaks
6. North Beach
7. Cole Park
8. Texas A&M University-Corpus Christi
9. McGee Beach
10. Corpus Christi Marina
# Point of Interest Cross Visitation

<table>
<thead>
<tr>
<th>Point of Interest</th>
<th>Texas State Aquarium</th>
<th>USS Lexington Museum on the Bay</th>
<th>Corpus Christi Marina</th>
<th>Whitecap Beach</th>
<th>Padre Island National Seashore</th>
<th>Michael J Ellis Beach &amp; Seawall</th>
<th>Corpus Christi International Airport</th>
<th>Docs Seafood &amp; Steaks</th>
<th>Mustang Island State Park</th>
<th>Snoopy’s Pier</th>
<th>Texas A&amp;M Corpus Christi Campus</th>
<th>North Packery Beach - J.P. Luby Surf Park</th>
<th>Emerald Beach Hotel</th>
<th>Omni Corpus Christi Hotel</th>
<th>Selena Museum</th>
<th>Water Street Market</th>
<th>North Beach</th>
<th>South Padre Channel Beach</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visitors</td>
<td>10,233</td>
<td>1,996</td>
<td>952</td>
<td>961</td>
<td>561</td>
<td>545</td>
<td>441</td>
<td>274</td>
<td>460</td>
<td>332</td>
<td>1,966</td>
<td>1,996</td>
<td>460</td>
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Travel Activities

[Bar chart showing various travel activities such as Beach & Waterfront, Biking, Boating, Camping, Culinary Experience, and Fishing, with specific audience demographics indicated.]
Point of Interest Cross Visitation
Did It make a difference?
Paid Integrated Media

- Combines all paid efforts to view campaign performance and pacing holistically, allowing us to make optimizations in real time
- Provides snapshot of high-level individual channel performance
- View monthly trending to see how optimizations are impacting overall integrated efforts
- Shows arrivals via Arrivalist to demonstrate ongoing impact
Paid Media

- Used to show which placement types and publishers are most efficient in garnering site engagements and inquiries
- View monthly trending to see how optimizations are impacting overall media efforts
Paid Search

- Overall channel performance and monthly trending
- Shows breakouts of campaign, device, and keyword performance and provides key metrics to show the most efficient tactics
Ads & summer visitors

Increases in visitors this year are partially due to our advertising.

Visitors who saw our ads were 47.5% more likely to come to Corpus over the summer than those who didn’t.

Advertising was especially effective out of state – visitors from out of state were 211% more likely to come to Corpus over the summer.
Recent rises in sales tax collections are mirrored almost exactly by rises in visitor volume.
$11.88 : $1.00

Hotel occupancy tax to Sales Tax Return on investment
Thank you
DEMYSTIFYING THE WORLD OF DATA AGGREGATION

August 17, 2021
AUDIENCE TARGETING
TARGETED MEDIA PLACEMENTS

TV SPOTS

SEARCHER

WANDERER

FAMILY

DATA

FAMILY

HOUSEHOLD
PERFORMANCE AND REPORTING
FACTORS TO CONSIDER

AUDIENCE       DATA METRICS       FREQUENCY

DASHBOARD
AUDIENCE
- MEDIA
- TOURISM INDUSTRY
- INTERNAL TEAM
- BOARD MEMBERS
- LEGISLATORS

DATA TYPES
- WEB/INQUIRY DATA
- MEDIA ENGAGEMENT
- PARK VISITATION
- STR HOTEL DATA
- SPENDING/TAX
- GEOLOCATION
- AIRPORT ARRIVALS

FREQUENCY
- WEEKLY
- MONTHLY
- QUARTERLY
- ANNUALLY
MONTHLY INDICATOR

INDUSTRY DASHBOARD
### Campaign Performance

**Marketing Team Dashboard**
DELIVERY METHODS
Research and Reports

Keeping a close eye on travel trends is an important function for the Department of Tourism.

Data and marketing research is a key component in any destination marketing organization’s toolkit. We strive to make the data available, for us and our industry, whether it be through the Monthly Travel Indicators below, the Quarterly Insights report, or annual studies. If there are specific questions that you have regarding initiation, markets, interest types, audience demographics or media preferences, please contact KIA Hubayda or call 605-773-5001.

MONTHLY INDICATOR DASHBOARD

PERFORMANCE METRICS
1/1/2021 - 12/31/2021

<table>
<thead>
<tr>
<th>Month</th>
<th>Revenue</th>
<th>Visits</th>
<th>Conversion Rate</th>
<th>Booking Rate</th>
<th>Revenue % Change</th>
<th>Visits % Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan</td>
<td>$45,678</td>
<td>5,432</td>
<td>2.1%</td>
<td>0.5%</td>
<td>5.2%</td>
<td>6.4%</td>
</tr>
<tr>
<td>Feb</td>
<td>$51,234</td>
<td>6,098</td>
<td>2.4%</td>
<td>0.7%</td>
<td>4.5%</td>
<td>8.0%</td>
</tr>
<tr>
<td>Mar</td>
<td>$55,789</td>
<td>6,543</td>
<td>2.8%</td>
<td>0.8%</td>
<td>5.0%</td>
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MONTHLY PERFORMANCE

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SELECT MORE"
COVID-19 RESEARCH
Updated: 5-13-21

WEEKLY UPDATES
RESEARCH FOCUSED
DATA AND INSIGHTS PROVIDED BY

Destination Analysts
UberMedia
U.S. Travel Association
ARRIVALIST
OAG
str
miles
H2R Market Research
MMGY Travel Intelligence
TOURISM ECONOMICS
AN OXFORD ECONOMICS COMPANY
ADARA
Longwoods International

WEEKLY UPDATES
RESEARCH FOCUSED
KEY TAKEAWAYS
THANK YOU

South Dakota
A Zen moment.....

Gone....
How are residents, in state and out of state visitors moving around the County? How have patterns changed pre-pandemic and current? After visiting the Falls core tourism district, where do visitors go next?
Niagara County 4th of July Weekend
July 1-5 2021

- Hotel revenue hit the highest recorded level since the COVID-19 pandemic, peaking on Saturday, July 3rd.
  - Average occupancy was 82.6%, peaking to 96.9% on the 3rd.
  - ADR reached $273, the highest since the pandemic.
  - The revenue generated over this weekend represents 55% of all revenue generated in the entire month of July last year (2020).

96.9%
PEAK OCCUPANCY REACHED ON JULY 3RD

$273
PEAK ADR, THE HIGHEST SINCE THE COVID-19 PANDEMIC

3.82
VISITOR-TO-RESIDENT RATIO AT NIAGARA FALLS STATE PARK

2.95
VISITOR-TO-RESIDENT RATIO AT LOCKPORT LOCKS & ERIE CANAL CRUISE

CONFIDENTIAL INFORMATION OF ZARTICO INC
Findings

- Top 3 origin markets were in state visitors
- The #2 market was from the opposite corner of the state, New York, NY
Findings

- Even though some of the top origin markets were local drive-markets, such as Buffalo and Rochester, NY, when we observe all origin markets over this weekend the majority (60%) of visitors were actually out of state.
A visitor is defined as someone traveling from outside of a 30 mile radius from Niagara County. Since the Buffalo DMA covers such a large area the Buffalo, NY traveler can fall into both the Resident and Visitor category. For this analysis, of all Buffalo, NY devices observed about 5% are categorized as Visitor.
Buffalo Traveler Overnight Accommodations

- Golden Hill Campground: 20.7%
- Fairfield Inn & Suites Niagara Falls: 34.5%
- Best Western Plus Lockport: 6.9%
- Comfort Inn & Suites: 3.4%
- Daisy Barn Campground: 6.9%
- DoubleTree by Hilton Niagara Falls: 3.4%
- Hayat Motel: 3.4%
- Niagara Hartland RV Resort: 6.9%
- Quality Inn Lockport: 6.9%
- Rodeway Inn & Suites: 3.4%
- Sheraton Niagara Falls: 3.4%
All Travelers Overnight Accommodations

- Fairfield Inn & Suites Niagara Falls: 51.5%
- Wingate by Wyndham Niagara Falls: 3.3%
- DoubleTree by Hilton Niagara Falls: 7.7%
- Super 8 by Wyndham Niagara Falls: 3.7%
- Sheraton Niagara Falls: 6.4%
- Quality Inn Niagara Falls: 5.7%
- Quality Hotel & Suites "A...: 3.7%
- Niagara Riverside Resort: 7.4%
- Holiday Inn Niagara Falls: 6.7%
- Hampton Inn Niagara Falls: 4.0%
Niagara Falls USA Knows How to Celebrate!!

**FOUR days of fireworks across SIX towns**

**FRIDAY JULY 2, 2021:**
- Seneca Niagara Resort & Casino, Niagara Falls, NY | 9:40 p.m.

**SATURDAY JULY 3, 2021:**
- Veteran’s Memorial Park, Town of Niagara | all day event
- Olcott, NY | 10 p.m.

**SUNDAY JULY 4, 2021:**
- Hyde Park, Niagara Falls, NY | Dusk
- Oppenheim Park, Niagara Falls, NY | Dusk
- Village of Lewiston, NY | Dusk |
- Outwater Memorial Park, Lockport, NY | Dusk

**MONDAY JULY 5, 2021:**
- Niawanda Park at Gibson Street, Tonawanda, NY | 9 p.m.
Event Locations

- Town of Niagara, Veteran’s Memorial Park
- Village of Lewiston
- Niagara Falls, Hyde Park
- Niagara Falls, Seneca Resort & Casino
- Lockport, Outwater Memorial Park
- Niagara Falls, Oppenheim Park
- Tonawanda, Niawanda Park
Visitor Movement

orange circles = out of state
blue circles = in state
July 4th: 8pm - 11pm

2019

Pre-pandemic:
Larger concentration of out of state visitors almost entirely in Niagara Falls and along the river

2020

Mid-pandemic:
Greater volume of in state travelers with more movement towards Lockport

2021

Post-pandemic:
Lockport lights up compared to previous years. Like 2020, we see a mix of in state and out of state visitors
Did the Pandemic Change In State Travel Behavior?

- **Pre-pandemic (2019)**: 69% Out of State Visitors, 31% In State Visitors
- **Mid-pandemic (2020)**: 51.6% Out of State Visitors, 48.4% In State Visitors
- **Post-pandemic (2021)**: 60.3% Out of State Visitors, 41.1% In State Visitors
Findings

- Compared to Friday night, North Tonawanda saw a big increase in mostly in state visitors.
- Isolating the top 3 origin markets we found visitors were mostly from Rochester, NY, shown in green.
July 4 - Residents: 8-11pm
Findings

- Again we see out of state visitors at the northwest lake side
- Majority of visitors were concentrated in downtown Niagara Falls, east Niagara Falls and Lockport
Thank You,
Here’s to a Great ESTO 2021!