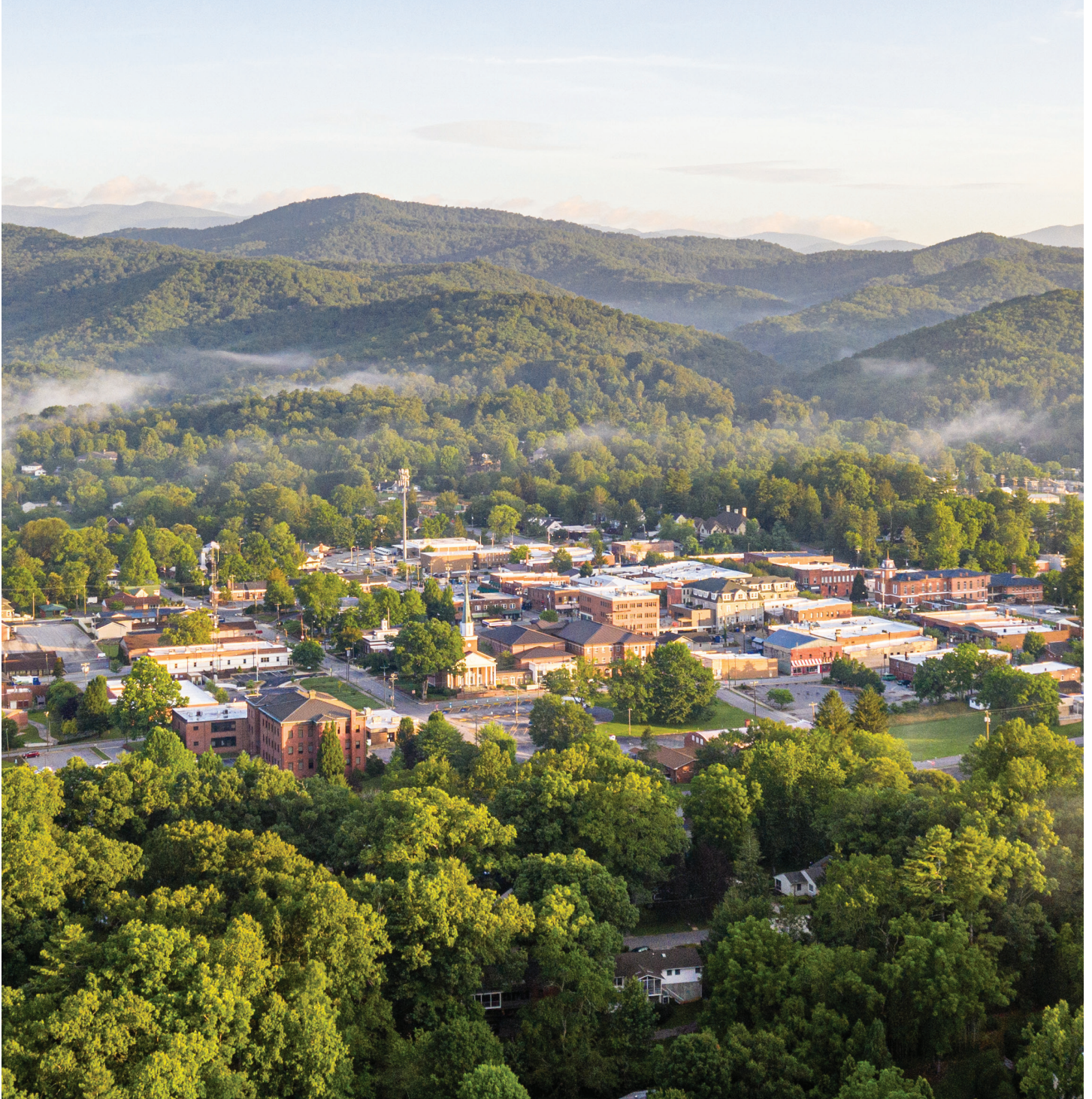


TRANSYLVANIA COUNTY TOURISM

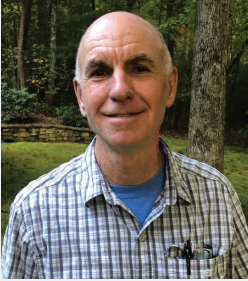
TRANSYLVANIA COUNTY TOURISM DEVELOPMENT AUTHORITY

2018/19 FISCAL YEAR
REPORT TO TRANSYLVANIA COUNTY COMMISSIONERS



TRANSYLVANIA COUNTY TOURISM

TRANSYLVANIA COUNTY TOURISM DEVELOPMENT AUTHORITY



GRANT BULLARD

A MESSAGE FROM THE CHAIR

On behalf of the Transylvania County Tourism Board of Directors and staff, we are excited to once again share this report with you. It's been a banner year for tourism in Transylvania County. Our organization has continued our goal of making our county a destination for a variety of visitors which, in turn, brings vital economic, cultural and social value to our community. This past year has seen a significant rise in occupancy tax revenue that is reinvested to promote and support many of our county's resources. We have embarked on creating a Long-Range Strategic Plan that was completed and adopted by our board several months ago. This plan will help to look further in our future, prioritize tasks, and ensure that our focus and actions meld with our vision of what we want tourism and our community to look like over the next five years. We are excited to begin working on the plan to: activate, collaborate and advocate for enhancements to our county. We invite you to explore these and many other highlights in the following pages.

AUTHORITY MEMBERS

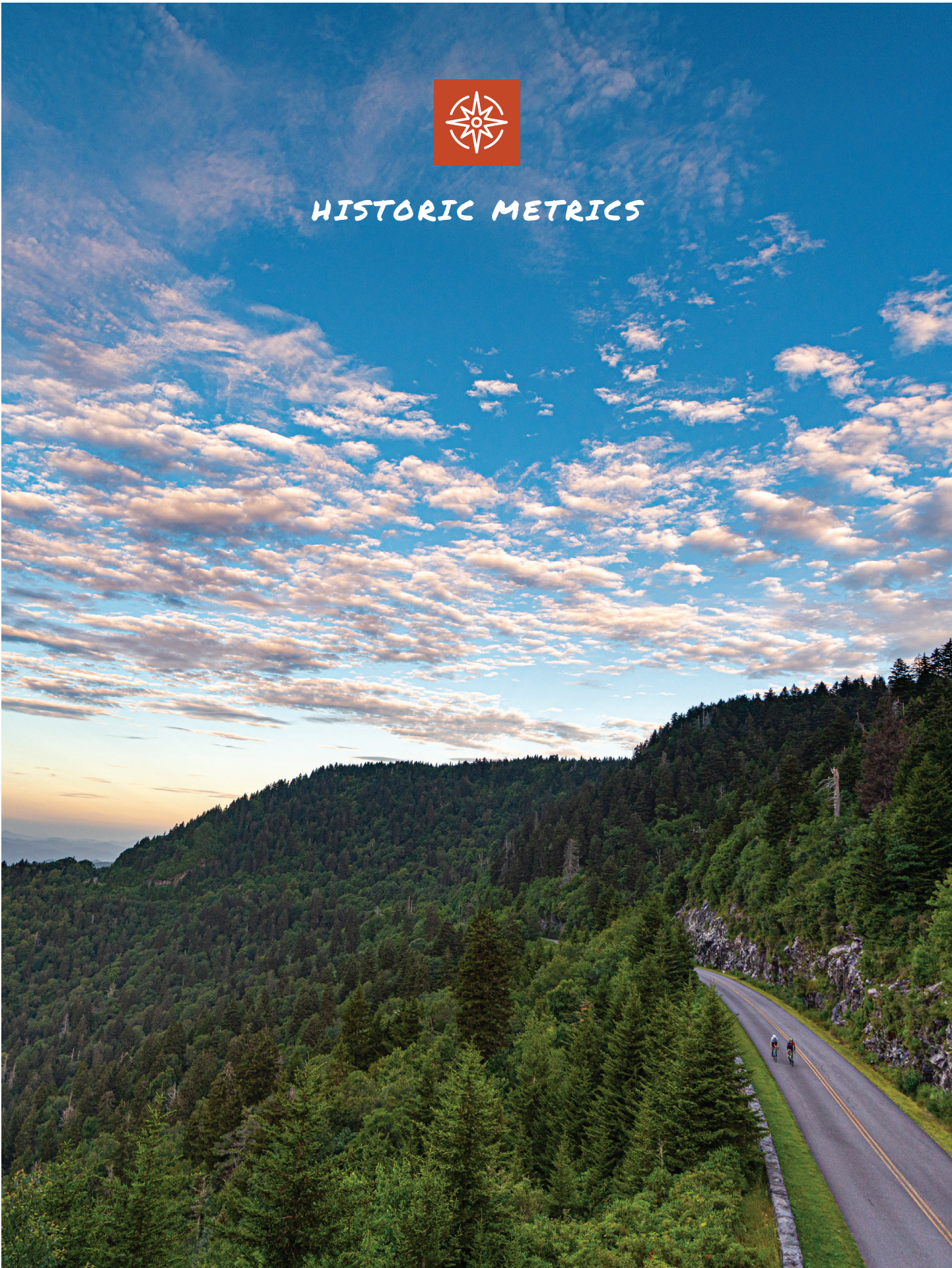
Grant Bullard, Chair
Aaron Baker
Mike Hawkins
Charlie Landreth
Layton Parker
Lori Roberts
Billy Smith

TCTDA STAFF

Clark Lovelace
Executive Director
Prentiss Brewer
Operations & Outreach Coordinator
Sally Burnett
Visitor Center Coordinator
Market Connections
Marketing and Advertising



HISTORIC METRICS



A VIBRANT VISITOR ECONOMY EQUALS LOWER TAXES AND MORE JOBS



\$106.32 MILLION

in tourism revenue



\$4.09 MILLION

in state tax revenue



870

jobs



\$20.64 MILLION

in payroll



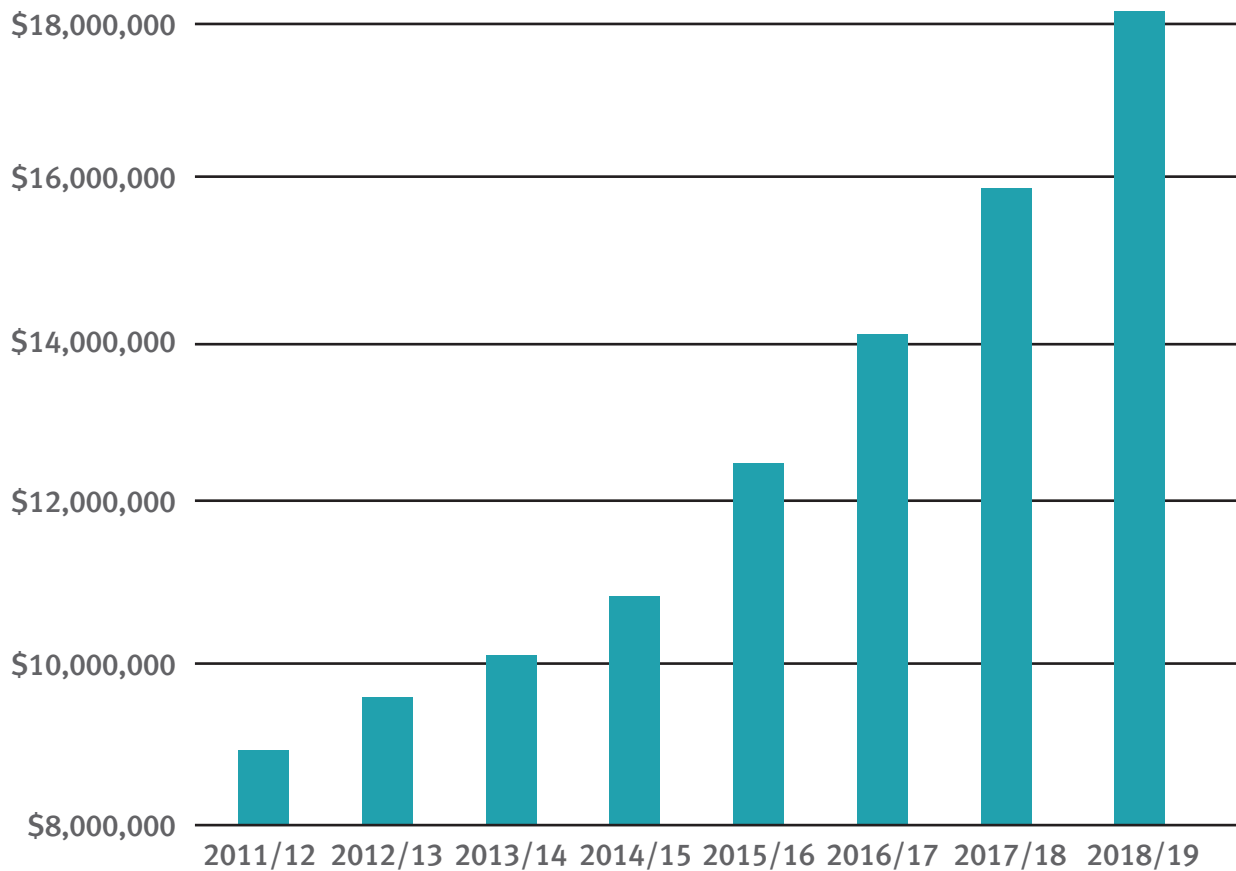
\$4.91 MILLION

in local tax revenue

\$254

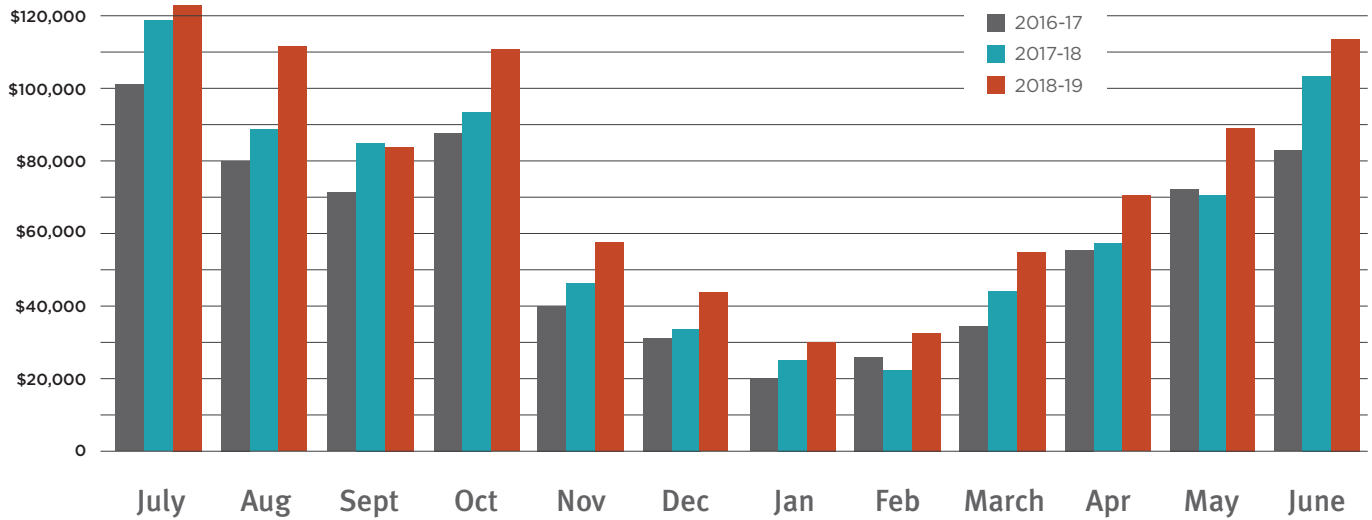
Tax savings per
Transylvania County resident

ANNUAL ACCOMMODATIONS REVENUE





OCCUPANCY TAX REVENUE 2016/17 - 2018/19 COMPARISON CHART



KEY 2018/19 OCCUPANCY STATS

67.8% Hotel/Motel/Inn Occupancy	UP 3.2%	\$131.51 Average Daily Rate (ADR)	UP 4.3%
\$922,367 Total Occupancy Revenue	UP 16.2%	\$180,730 Airbnb Collections	UP 45.6%

OCCUPANCY INSIGHTS

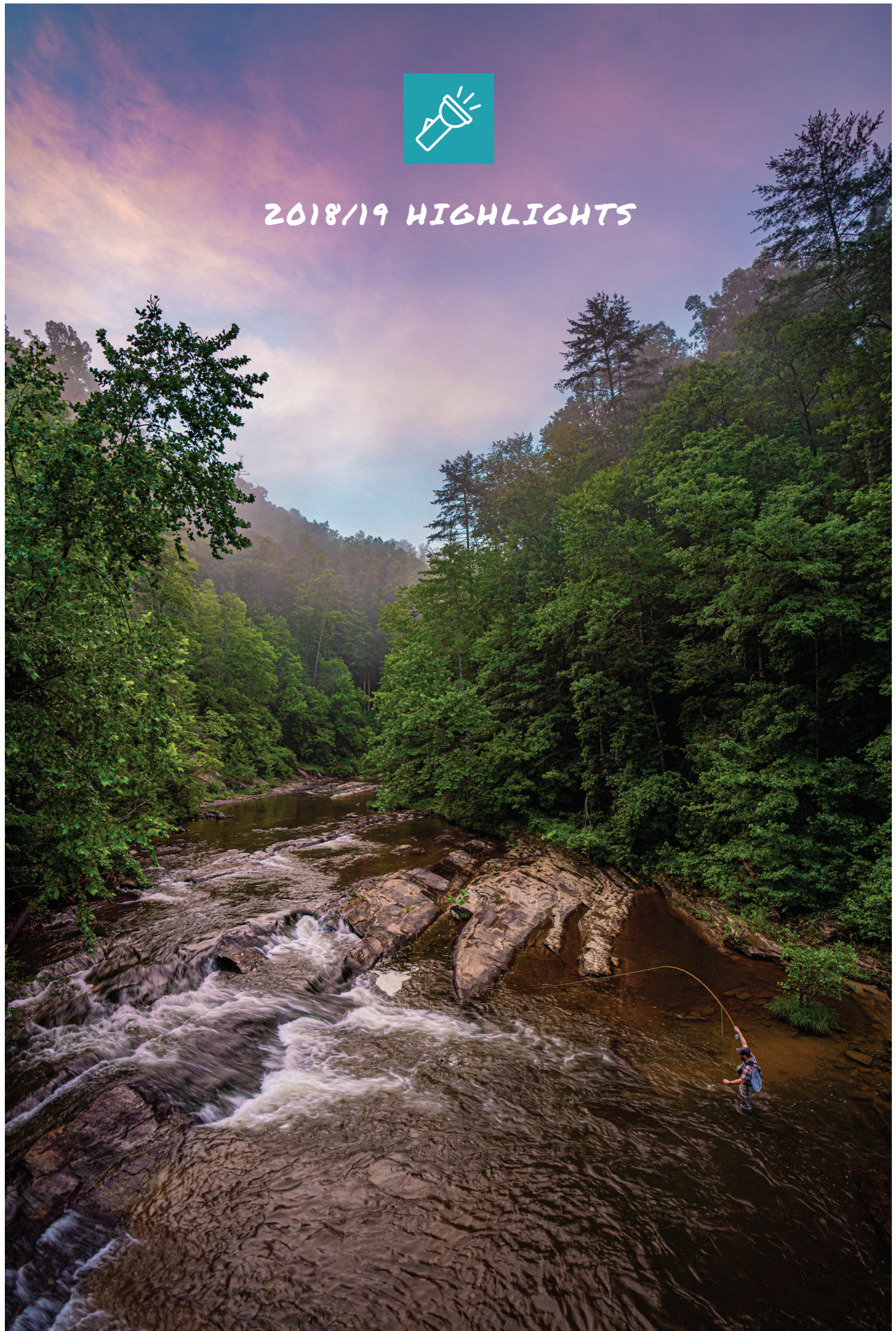
Annual occupancy tax revenue continues to grow, increasing 16.2% over prior year. A portion of this increase is due to a higher ADR for accommodations, but most is assumed to be an increase in the number of overnight visitors to the area. Since the supply of traditional accommodations didn't change substantially and reported occupancy increased only slightly, we can assume that just a small portion of these additional visitors stayed in traditional accommodations. The area that was the biggest recipient of these additional overnight visitors was the short-term rental (STR) market. Since our only access to information on this market is a lump sum payment from AirBnB, we can only assume that growth was a combination of both a greater usage of existing units, and additional rental units added to the inventory.

Looking forward, it is worth noting that the supply of traditional accommodations will change significantly with the addition of the 86-room Holiday Inn Express at Brevard Place. It is anticipated that this addition, particularly in the short-term, will lead to greater total accommodations revenue, lower total occupancy rate, and possibly a reduction in total ADR.





2018/19 HIGHLIGHTS



NEW BRAND ASSETS & CAMPAIGN

In winter of 2018 we launched the new Explore Brevard brand including a new logo and website with a URL of ExploreBrevard.com. The new website features a blog-centric layout which is designed to capture web traffic based on high interest search terms which shift seasonally. Further integration of social media platforms like Facebook, Instagram and YouTube will create a seamless voice for users who are directed to the new site from those channels. Additionally the events calendar took on a complete overhaul to create a better experience for users who view events and users who post events alike. Lastly, we added filterable directories for restaurants/dining options and lodging as well as lodging specials. With a new website launch a dip in site traffic is expected. We did experience some initial decrease in visitation, but traffic has now returned to a normal pattern. The switch to a blog-centric layout has been validated by the fact that two of our top three pages on the site are blog posts, which are the “Top 10 Waterfalls” and “Nine Iconic Brevard Experiences” blogs respectively.



MARKETING AND ADVERTISING

Our 2018/19 marketing plan reached 61 million+ potential visitors through targeted print and digital advertising, television, display and social media. This is double the audience size of the previous fiscal year.

Print publications included Our State, Garden & Gun, Atlanta Magazine, Southern Living, Woman's Day, Good Housekeeping, BIKE Magazine, Blue Ridge Parkway Directory and Travel Guide, The Laurel of Asheville, Blue Ridge Outdoors, Charleston Magazine, Outside Magazine, AAA Go, Blue Ridge Parkway Official Guide, Autumn Explorer, Bike Transylvania, Blue Ridge Outdoors, Visit NC Travel Directory and partner program placements, I Explore Digital, Canadian Outdoor Adventure Digital Display, Romantic Asheville, and WNC Magazine.

Social Media included Facebook, Instagram, Twitter, You Tube, and Vimeo, with constantly increasing fan base and regular, highly targeted general and niche promotions.

Digital marketing included a range of digital display outlets, PPC (Pay Per Click), Retargeting, Pre-roll and Live Streaming.

In 2018/19, cable television advertising ran in Atlanta, Charlotte, and Raleigh, NC, Greenville, SC, Jacksonville, FL and Nashville, TN.

Transylvania County Tourism also secured Lamar Advertising's most sought after area I26 board at the Asheville Airport. Additionally, TCT has end-cap rack displays at both Asheville and Greenville Airports in the baggage claim areas.



MARKETING PRIORITIES & TACTICS

Our 2018/19 marketing strategy focused on several key messages during the year, first of which was a concentrated effort to grow visitation during shoulder seasons. We deployed several new methods, including seasonal targeted advertising, social media campaigns and multiple sweepstakes, in order to generate awareness within our audience about the opportunities that exist during these times. To date we have placed 34 print & digital ads and conducted four sweepstakes for the holidays, winter, spring and fall. This method has not only allowed us to increase awareness for shoulder seasons, but also increase our subscriptions for our e-newsletters and orders for Adventure Guides.

Second, we have explored focused marketing opportunities with the Canadian cycling market. A targeted digital campaign placed within Cycling Canada focused on late winter/early spring visitation from eastern Canada.

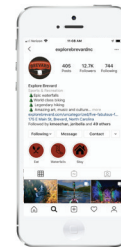
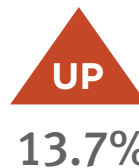
In addition to these efforts we have continued to implement “Stay and Play” messaging encouraging our visitors to either remain in the county for an extended visit as opposed to a day trip or consider our destination as a base camp for their next adventure.

ELECTRONIC & DIGITAL

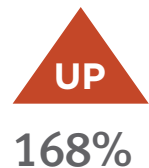
SOCIAL MEDIA reaching consumers in dynamic new ways



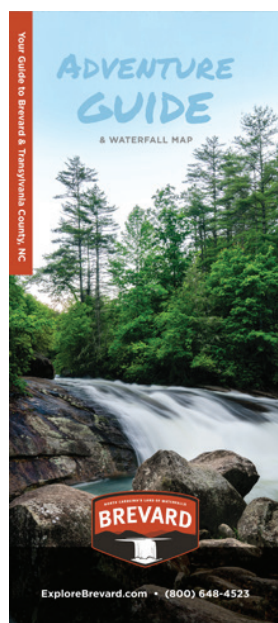
FACEBOOK



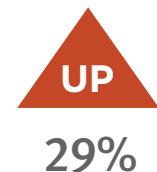
INSTAGRAM



CONTINUATION OF popular Adventure Guide and Get OUT Guide



GROWTH OF The Adventurist up 29% over previous year



ADDITION OF Field Notes e-newsletter focused on a single topic monthly

BREVARD / TRANSYLVANIA VISITOR CENTER

From July 1, 2018 to June 30, 2019, staff and volunteers at our visitor center supported tourism by:

- Welcoming 16,005 guests
- Receiving 912 toll free calls
- Distributing 115,000 brochures
 - 29,000 shipped to visitor/welcome centers outside of our area
 - 28,000 distributed to park/forest visitor centers and tourism businesses in Transylvania
 - 25,000 shipped or delivered to visitor/welcome centers in surrounding counties
 - 18,000 mailed to individuals upon request
 - 15,000 handed to individuals at the Visitor Center or TCT-staffed event booths
- Distributing 33,500 Get Out Guides throughout Transylvania
- Supporting 1,000+ relocation requests



As determined in the new strategic plan, the Visitor Center remains an important part of Transylvania County Tourism operations. At the same time, visitor centers everywhere, including ours, are experiencing a decrease in visitation as consumers spend more time gaining information on the internet and less time doing so in person. This is reflected in the continuing growth of our website and social media visitation.

This past year we updated the facility with the new brand and added limited retail in the form of items with the new “Brevard” logo. We are

currently working on other ways to make the visitor center a more relevant destination for travelers and locals looking to learn more about things to do in Transylvania County.



PUBLIC RELATIONS

Public relations continues to represent one of the best returns on investment of Transylvania County Tourism's marketing dollars. In 2018/19, your TCTDA hosted several familiarization tours for journalists.

Additionally, yet again Transylvania County was represented at important media missions sponsored by Visit NC in New York and Canada. Transylvania County Tourism was also represented at Visit NC's annual 365 Conference, which was held in Wilmington.

Highlights of 2018/19 include:

- Developed and spearheaded a successful public relations campaign with Transylvania Always around Waterfall Safety that resulted in posters, press events and multiple stories in local and regional media outlets
- Hosted the following FAM Tours and individual journalists:
 - Our State Magazine: Elizabeth Hudson, editor – Pisgah Fish Camp, Songcatcher and additional stories in 2019
 - Canadian Geographic Traveler: Andrew Findlay, journalist
 - Cycling Journalist - Northern Ontario Tourism: Martin Lortz
 - Wake Living Magazine: Leah Hughes, "Spring Attractions in Transylvania"
 - WNC Magazine, Melissa Reardon, editor, "Historic Toxaway"
 - WUNC TV, Shannon Vickery, producer, Get Set Transylvania, Halloweenfest and Sesame Street
 - Meredith Publishing's NC Travel Road Show
- The Today Show with Davy Sutton, producer, Transylvania as one of "Four Special US Vacations" (Note: Ms Sutton contact result of NYC Media Mission)
- Garden & Gun and Charlotte Observer: Pisgah Pete for Groundhog Day
- Relocation Magazine: Lynne Brandon "Retire in Brevard" feature on outdoor adventure and unique downtown.
- Media Missions: Canadian Adventure Mission, NYC Media Mission with Visit NC, 365 Conference Regional Editorial Roundtable
- Wrote and distributed over a dozen TCT and Transylvania Always news releases published in numerous local and regional publications

SUSTAINABILITY

Transylvania County Tourism launched a sustainability campaign in 2017 named Transylvania Always. Its mission is to be a leader in the effort to take care of Transylvania County's natural resources in order to create a safe and enjoyable user experience and ensure that these assets are here for future generations.

The following are projects that Transylvania Always has funded so far:

Waterfall Safety campaign

- 2 Waterfall Safety Media Days
- PSA video - for use via digital outlets and at park/national forest visitor centers
- Waterfall Safety Posters and souvenir cards distributed to parks and tourism-related businesses



Cantrell Creek Project

\$20,000 from TCT in partnership with Pisgah Conservancy, Trout Unlimited, REI, Backcountry Horsemen, Mills River Partnership, Mountain True, and Pisgah Area SORBA. Project will create a new 2.5-mile trail away from the creek resolving the Issue of eroded soil, which was causing damage to aquatic life.

Joel Branch/Horse Cove Connector

\$25,000 from TCT in partnership with Pisgah Conservancy, City of Brevard, Transylvania County to create an easy connection for the Bracken Mountain Trail to Pisgah National Forest.

French Broad River

\$10,000 to TC Soil and Water to supplement county funds for debris removal.

Carolina Climbers Coalition

\$3,000 for rehabilitation of four forest service trails leading to the base or summit of Looking Glass Rock.

Video Series

Transylvania Always also produced a series of five videos focused on the following:

- Waterfall Safety
- Trail Courtesy
- Trail Maintenance/Volunteering
- River Clean Up
- Ominbus Overview of Transylvania Always

Transylvania County Tourism was a founding Member of The Pisgah Conservancy and through our Transylvania Always initiative have supported events/programs for partners like The Economic and Environmental Impact of the Outdoor Recreation Industry in Transylvania County Workshop, Friends of Gorges State Park, The French Broad River Stewards, Headwaters Outfitters River Clean-Up, Friends of Dupont, and more.



GRANTS AND PARTNERSHIP FUNDING

The goal of the Tourism Grant Program is to maximize the impact of TCT funds by supporting local individuals and organizations with events or initiatives that positively affect the local tourism economy. Criteria include generation of overnight stays, amount of out-of-market advertising, impact on tourism in off-peak times, and more.

Tourism Grant Program

In FY19, \$25,400 in funding support to sixteen recipients was awarded through our grant committee.

Special Grants

Several special grants were awarded above and beyond the scope of the Tourism Grant Program, including support of the City of Brevard's bike path infrastructure, Heart of Brevard events/advertising, Brevard Music Center advertising, and the Cycle NC Mountain Ride.



PARTNER SERVICES

Transylvania County Tourism provides many unique offerings for local tourism-related businesses, often leveraging our reach, buying power, and relationships, to create affordable opportunities that may not otherwise exist for these businesses. The list of offerings has grown over the years, culminating with our first Transylvania County Tourism Partner Marketing Symposium on August 23, 2019, where we presented a full array of opportunities, followed by a program with tourism marketing tips from our marketing partner agency, Market Connections. Following is a highlight of what was covered, including a few opportunities that are new to FY 19/20.

Co-op Campaign

This popular campaign allows tourism-related businesses the opportunity to participate in Transylvania County Tourism’s marketing effort in a variety of high profile publications, including Our State, Blue Ridge Outdoors, WNC Magazine and Southern Living. Market Connections was able to leverage our relationships and buying power to secure these co-op spaces for our tourism-related businesses at substantial discounts. For 2018/19 the campaign was extended to provide additional coverage and promotion of shoulder seasons.

Holiday Co-op Marketing Opportunities

As part of our exciting holiday marketing campaign, designed to build visitation during the winter months, we’re excited to provide several excellent co-op advertising opportunities to our partners. Cooperative ads in 1/6 and 1/4 page sizes will be part of full-page or spread placements that promote the holiday experience in Transylvania County.



Winter Co-op Marketing Opportunities

Transylvania County Tourism is offering three 1/6 page ad placements in both The Laurel of Asheville and WNC Magazine. Highlighting our winter sweepstakes, activities, romantic getaways and unique culture, partners are invited to feature their unique offerings and warm the hearts of visitors in our chilly season.

Spring Co-op Marketing Opportunities

Transylvania County Tourism is pleased to offer special spring campaign placements to interested co-op participants. There are three 1/6 page placements offered to partners in three publications.



Adventure Guide Advertising & Distribution

Explore Brevard’s annual Adventure Guide (which includes a popular foldout Waterfall Map) publishes in early January and is distributed to 115,000 interested travelers regionally, nationally and internationally throughout the year. The Guide is available through Explore Brevard web sign-ups, targeted NC distribution, at welcome and visitor centers regionally, through downloadable brochure attachments on a myriad of related websites from VisitNC.com and SLVacations.com to major media outlets. The Guide is also mailed directly to leads received from a variety of major print publications and provided to interested major media near and far.

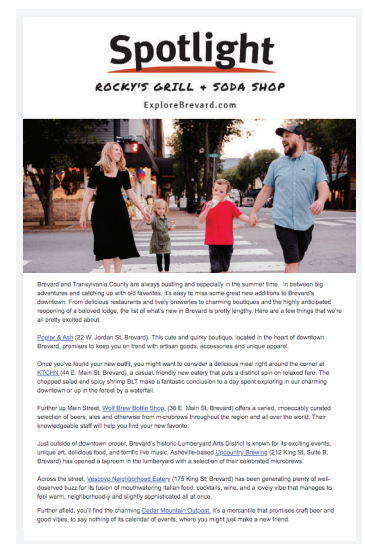


Get Out Guide Sponsorship NEW

Transylvania County Tourism is excited to offer a new opportunity to partners who wish to highlight their business or attraction through a special placement in TCT’s monthly Get Out Guide, which is distributed to stores, accommodations, restaurants and attractions across our community (3,000 distributed monthly). A sponsorship ad will serve as the foundation for each Guide and the opportunity will be limited to only one partner per issue (11 issues).

Spotlight: E-newsletter Business Profile NEW

Each quarter, Transylvania County Tourism will share a sponsored e-newsletter, with an audience of nearly 19,000 interested travelers, focused on a single business. This will provide a unique opportunity to highlight your businesses with our targeted e-newsletter subscriber base.



Sweepstakes

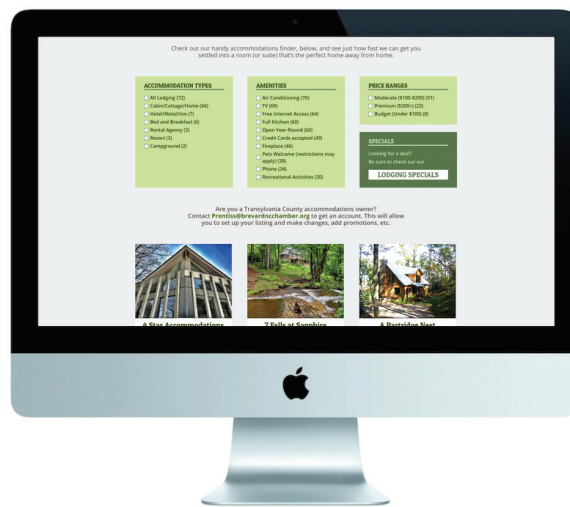
Last year, TCT conducted two “test” sweepstakes that were enormously successful, averaging 2,350 entries per contest. As a result, we have expanded this initiative and will offer Holiday, Winter, Spring and Fall Sweepstakes in 2019-20 to increase awareness and build visitation to our community during shoulder seasons. These sweepstakes result in thousands of entries from all over the country, along with thousands of requests for the Adventure Guide and the Adventurist newsletter. While primarily marketed digitally through blogs and social media, sweepstakes are also marketed through very targeted print publications. A special Sweepstakes landing page for each season lives on explorebrevard.com, which contains the entry form and provides exposure to local tourism partners who participate with us in each sweepstakes. Sponsors will be provided the email addresses of all entries who opt-in.

Explore Brevard Events Calendar

ExploreBrevard.com provides a free events calendar to all community marketing partners. It is a great resource to generate awareness for your local events with our online audience. Events posted on the calendar may also be included in additional marketing collateral like the Get Out Guide and the Adventurist e-newsletter. To enter your event on our website, visit explorebrevard.com/events-calendar and click the “Add your own events” button.

Business Listings

ExploreBrevard.com includes comprehensive business listings for accommodations as well as attractions, businesses and places to eat and drink. Each business listing page includes a feature photo, business description, location information and website link. Each listing is optimized with a filterable database which allows website visitors to find your business easily. Linking your website to Explore Brevard’s business listings is also a great way to improve the SEO of your site. To get started with your business listing contact Prentiss@explorebrevard.com.



Media Support

If you are hosting media, and would like assistance, the Explore Brevard team can help. Whether it’s providing FAM tours of the County, photography or simply spreading the word about the visit, our team is prepared to assist you. Contact Prentiss@explorebrevard.com for more information.

Photo Resources

Explore Brevard maintains an extensive database of photography for use in marketing Transylvania County. A selection of public use photos are available to tourism partners for approved purposes and can be found at explorebrevard.com/public-use-photos. For additional photo requests email Prentiss@explorebrevard.com.



SPECIAL PROJECTS

Each year TCT undertakes projects above and beyond the normal annual operations of the organization, simply referring to these as special projects. Many are in direct support of the marketing plan and are only listed as special projects since they are big ticket items not occurring annually and are not included in the marketing plan. Photography/videography for our new campaign, branding expenditures, and movement of our billboard to a prime (and more expensive) location, are key examples from this year. These will not be covered here. Instead, we will focus on two particular special projects of note.

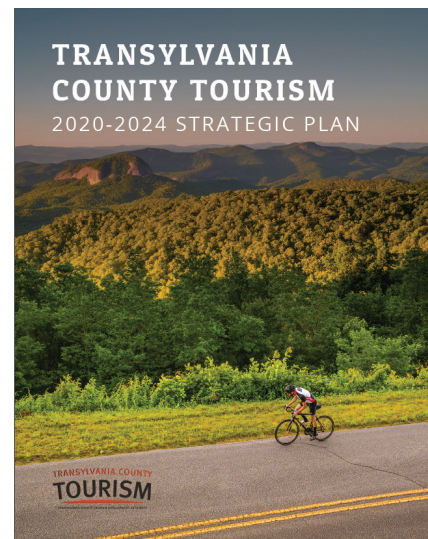
Strategic Plan

Beginning in late-2018, TCT underwent the process of creating a new strategic plan to guide county-wide tourism from 2020 to 2024. The plan was developed by Chris Cavanaugh/ Magellan Strategy group with help from local community stakeholders. Taking cues from multiple work sessions and critical local interviews, the new plan calls on a program that activates, collaborates, and advocates. The strategic aim is to “grow the visitor economy by promoting Transylvania County as a preferred overnight destination that seamlessly integrates outdoor recreation, scenic beauty, and small-town charm, and helps protect and enhance the assets that fulfill that promise.”

The ambitious plan includes seven focal points with defined strategies and actions for achieving desired results. The TCT board has subsequently approved an implementation plan and initiated efforts to move forward with that plan.

The strategic plan was sent to the commissioners following a community presentation.

A copy can be found at explorebrevard.com/strategic-plan/.



UberMedia Marketing Report

Through our work with Chris Cavanaugh, we were introduced to UberMedia, a mobile data analytics company. Their capabilities in the collection, preparation, and dissemination of mobile consumer data focused on location and behavioral information matched our desire to learn more about how visitors enter key destinations in our county and how they travel once they arrive. In the end, we contracted with UberMedia to provide us data on origin, demographics, and crossover visitation for visitors to Dupont State Recreational Forest, the Pisgah Ranger District of Pisgah National Forest, and downtown Brevard. Specific GPS and place of origin parameters were set up to only capture data for visitors to these areas of Transylvania County, traveling from outside of our metro area (which includes Greenville, Asheville, Transylvania, and other surrounding counties). While the data collected represents less than 5% of total visitors to these locations, with 10,000+ responses, the information far surpasses the minimum needed for statistical relevance. Key results are covered on the next page →

UBER MEDIA STUDY RESULTS

UberMedia Cross Visitation Report 2018

Area	QTR	BVD Visitors seen	% BVD Visitors	PNF Visitors seen	% PNF Tourists	DPT Visitors Seen	% DPT Tourists
Brevard, NC - Downtown BVD	Q1	3100	100.00%	282	33.73%	145	21.32%
	Q2	7171	100.00%	850	33.28%	399	22.96%
	Q3	8860	100.00%	1141	33.61%	578	25.50%
	Q4	6060	100.00%	832	34.99%	406	21.78%
	Total		25191	100.00%	3105	33.89%	1528
Pisgah National Forest PNF	Q1	282	9.10%	836	100.00%	79	11.62%
	Q2	850	11.85%	2554	100.00%	291	16.74%
	Q3	1141	12.88%	3395	100.00%	414	18.26%
	Q4	832	13.73%	2378	100.00%	252	13.52%
	Total		3105	12.33%	9163	100.00%	1036
Dupont State Forest DPT	Q1	145	4.68%	79	9.45%	680	100.00%
	Q2	399	5.56%	291	11.39%	1738	100.00%
	Q3	578	6.52%	414	12.19%	2267	100.00%
	Q4	406	6.70%	252	10.60%	1864	100.00%
	Total		1528	6.07%	1036	11.31%	6549

Description of Statistics

34% of the visitors to Pisgah National Forest from outside of our local area also visited downtown Brevard

12% of the visitors to downtown Brevard from outside our local area also visited Pisgah National Forest

23% of the visitors to Dupont State Forest from outside our local area also visited downtown Brevard

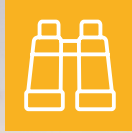
6% of the visitors to downtown Brevard from outside our local area also visited Dupont State Forest

11% of the visitors to Pisgah National Forest from outside of our local area also visited Dupont State Forest

16% of the visitors to Dupont State Forest from outside our local area also visited Pisgah National Forest

UberMedia Origin Reports 2018

Brevard Downtown Top 10			Pisgah Nat Forest Top 10			Dupont Forest Top 10		
	Count	%		Count	%		Count	%
Charlotte	3091	12%	Charlotte	1067	12%	Charlotte	743	11%
Raleigh	2093	8%	Raleigh	828	9%	Tampa/ St. Pete	612	9%
Atlanta	1971	8%	Atlanta	503	6%	Raleigh	434	7%
Orlando/Daytona	1218	5%	Tampa/ St. Pete	468	5%	Atlanta	394	6%
Tampa/ St. Pete	1201	5%	Orlando/Daytona	443	5%	Chattanooga	295	5%
Charleston	873	3%	Greensboro	277	3%	Orlando/Daytona	273	4%
Greensboro	855	3%	Jacksonville, FL	272	3%	Charleston	187	3%
Columbia	811	3%	Columbia	265	3%	Miami / Fl Laud	172	3%
Jacksonville, FL	723	3%	Charleston	264	3%	Jacksonville, FL	155	2%
Miami / Fl Laud	575	2%	Miami / Fl Laud	249	3%	Columbia	152	2%
Total Top 10	13411	54%	Total Top 10	4636	51%	Total Top 10	3417	53%
Total Non-Local Visitors BVD	24948		Total Non-Local Visitors PNF	9061		Total Non-Local Visitors DPT	6497	
Local Visitors	28035		Local Visitors	5357		Local Visitors	3921	
Total Brevard Downtown Visitors	52983		Total Pisgah Nat Forest Visitors	14418		Total Dupont Forest Visitors	10418	
% Downtown Visitors Local	53%		% Pisgah Nat Forest Local	37%		% Dupont Forest Local	38%	
% Downtown Visitors Non-Local	47%		% Pisgah Nat Forest Visitors non-local	63%		% Dupont Forest Visitors non-local	62%	



LOOKING FORWARD



BRAND INITIATIVES OVERVIEW

Positioning Brevard, Transylvania County and Land of Waterfalls for the future.

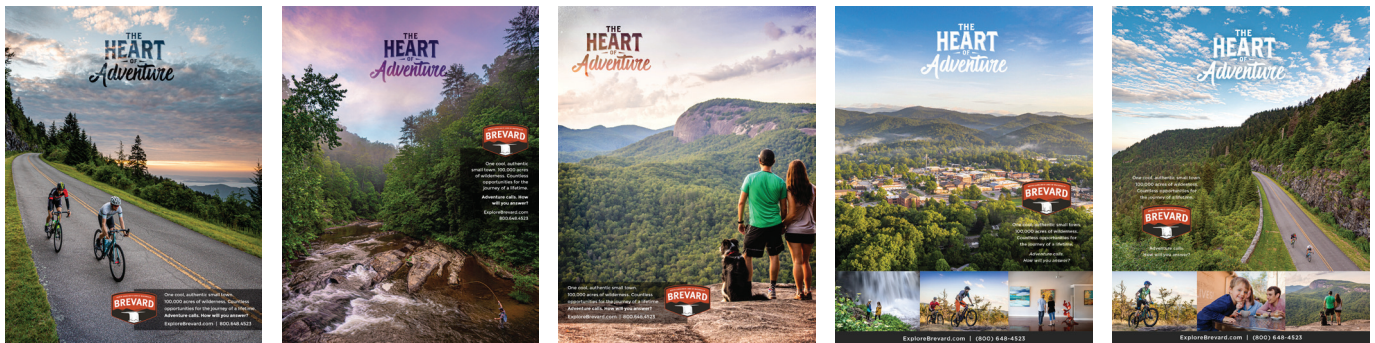
The strategic plan is a guide that will serve as a foundation for TCT over the next five years. Here are a few highlights of what's to come in FY20:

Marketing:

New “Heart of Adventure” ad campaign



Multifaceted video, digital and print campaign. Our most successful video ever with 100K views in first month.



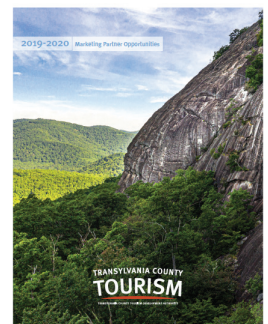
New Digital plan

Partnering with new digital placement partner to implement native, pay per click, retargeting and YouTube digital advertising strategies.



New Partner Opportunities

Conducted a marketing partner summit to introduce new marketing partner opportunities such as sponsorship of the Get Out Guide, E-Newsletters, Co-Op advertising and much more.





ExploreBrevard.com

