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**SPECIAL LEGISLATIVE COMMISSION TO STUDY  
METHODS FOR GROWING TOURISM IN THE STATE OF  
RHODE ISLAND THROUGH COORDINATED BRANDING AND  
MARKETING EFFORTS**

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**NOTICE OF MEETING**

**DATE:** Friday, September 28, 2018

**TIME:** 11:00 A.M.

**PLACE:** Room 101 - State House

**AGENDA**

- I. Opening Remarks- Chairwoman Lauren Carson
- II. Presentation
  - Megan Epler Wood- Principal, EplerWood International
- III. Updates from Hotel Taxes, Metrics and Structure Subcommittees
  - Roundtable discussion regarding next steps
- IV. Discussion regarding 3<sup>rd</sup> party hosting platforms and agenda items for future meeting with Rhode Island Commerce Corporation
- V. Update on the 2018 Summer season:
  - Discussion on Rhode Island's summer season
- VI. Report from RI Commerce
  - Campaign Metrics
- VII. Next Meeting Dates and Agenda items

**\*No Public Testimony will be accepted at this meeting Contact: Charles Donovan at House Policy (401) 528-1765 [CDonovan@rilegislature.gov](mailto:CDonovan@rilegislature.gov)**

**POSTED: TUESDAY, SEPTEMBER 18, 2018, 12:29 P.M.**



Introduction

*Sustainable  
Tourism  
Development*

Megan Epler Wood



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**Rhode Island Tourism Commission**

September 28, 2018



# Defining Sustainable Tourism

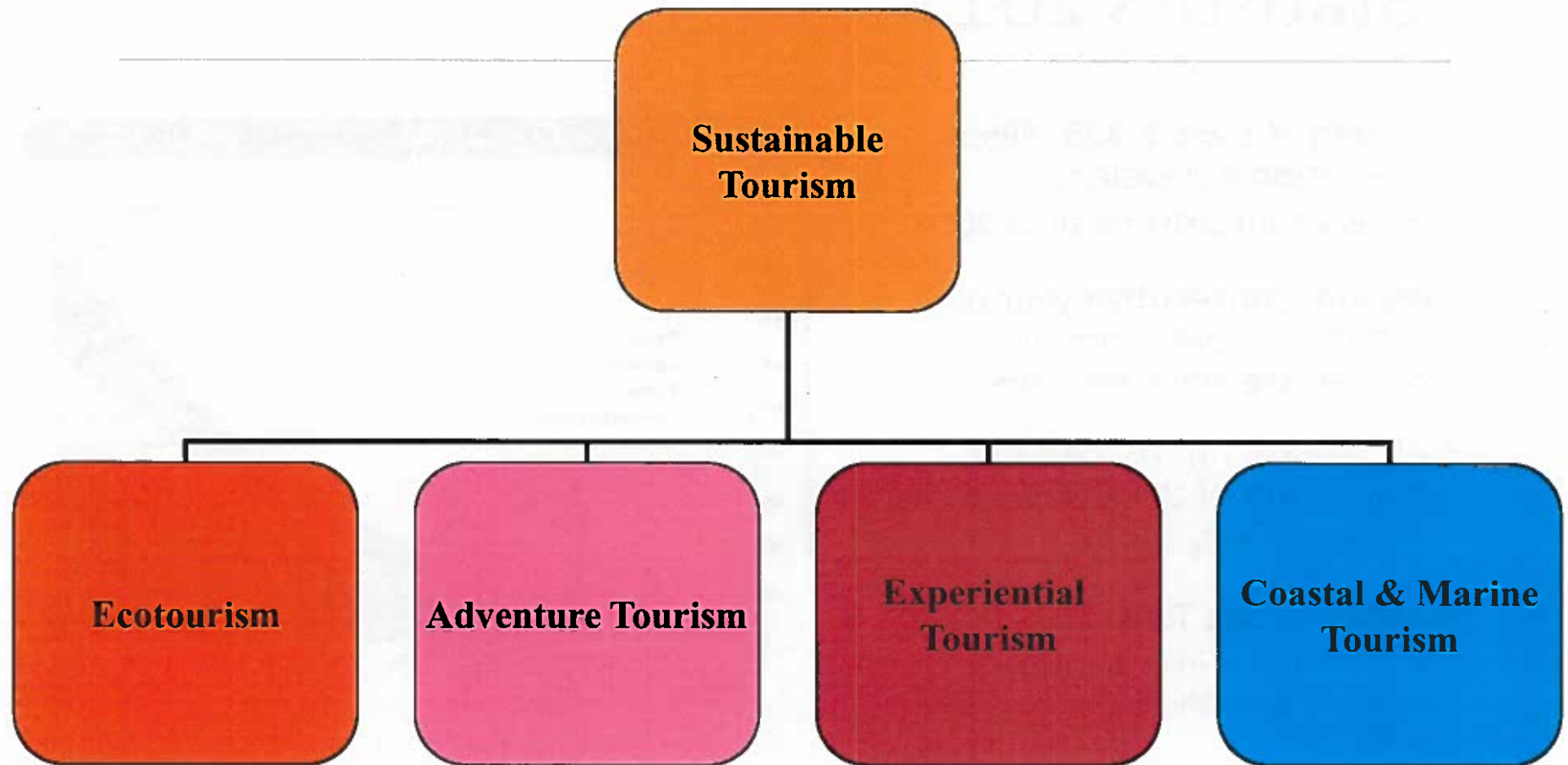
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- Optimal use of environmental resources
- Respect for socio-cultural authenticity of host communities
- Viable long-term economic operations
- Sustained, informed participation of local stakeholders
- High level of tourist satisfaction

*UNWTO Conceptual Definition 2004*

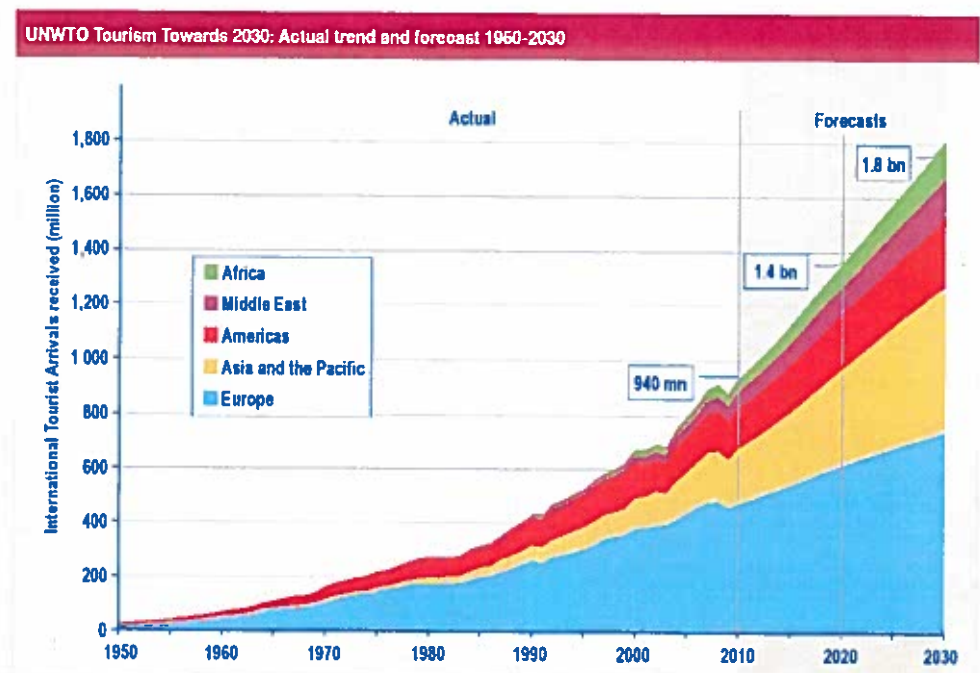


# Defining the Fields of Action



# International Travel and Tourism Statistics 2017

- Growth at 6.8% 1.323 billion international travelers
  - Fastest growth rate since 2010
- Seventh consecutive year of sustained growth, nothing comparable since the 1960s
- U.S. market up 3%, half the growth rate of the global market
  - Receipts only 1% up
- **Outlook Long Term 2010-2030**
  - 3.3% a year in international visitor growth- a conservative figure



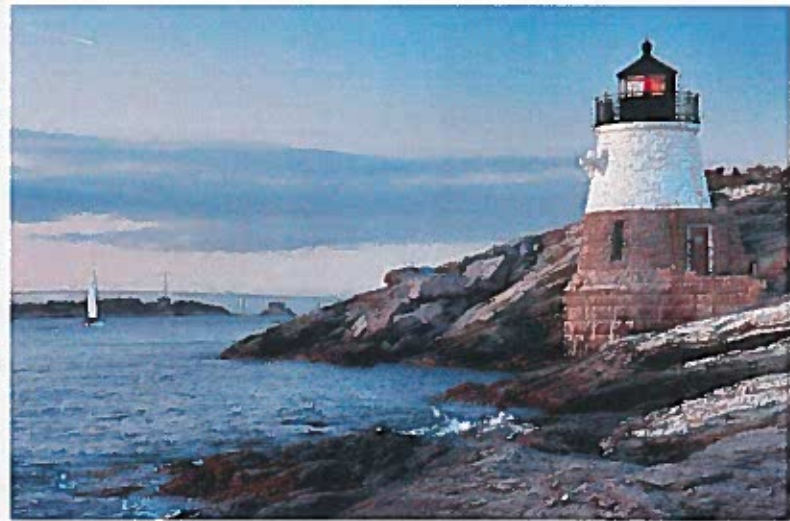
# Tourism Industry Not Like Other Industries

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PRODUCTS IN WIDE RANGE OF CATEGORIES



SERVICES FREQUENTLY IN PUBLIC DOMAIN



# Tourism System





# Action Planning- Sustainable Tourism Development

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## Setting Priorities

- Economic Development
- Environmental Asset Protection
- Socio-cultural Asset Protection
- Uncongested Land-Use
- Rural Development and Poverty Alleviation
- Sustainable Resource Use
- Well Managed Infrastructure for Tourism

# Creating an Integrated Sustainable Destination

- Destinations have a choice to either upgrade systems or rely on aging infrastructure and planning approaches
- A new breed of technology powered planning approaches can help to achieve sustainability



## Role of Government

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- Enabling and providing incentives for the private sector to function more sustainably
- Influencing patterns of tourism flows
- Maximizing economic benefits throughout the state
- Minimizing environmental and cultural impacts
- Maximizing local benefits
- Protection and management of public assets

# Why is government enabling environment required?

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- Tourism industry has a very fragmented set of players in micro, small and medium enterprises
- Protecting air, water, & natural resources is a government domain
- Protecting socio-cultural assets is a government domain
- Governments have the power to both provide incentives for growth & regulate tourism impacts

# Diversifying Sustainable Tourism Product Pool

- Facilitate investment in top public assets to allow for responsible use
- Create plan for investment in valuable tourism assets, both historic and natural to attract experiential tourists



Historical Society Tour,  
Manissean Native American Site, Block Island,

# Types of Government Intervention

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## Careful planning of tourism infrastructure

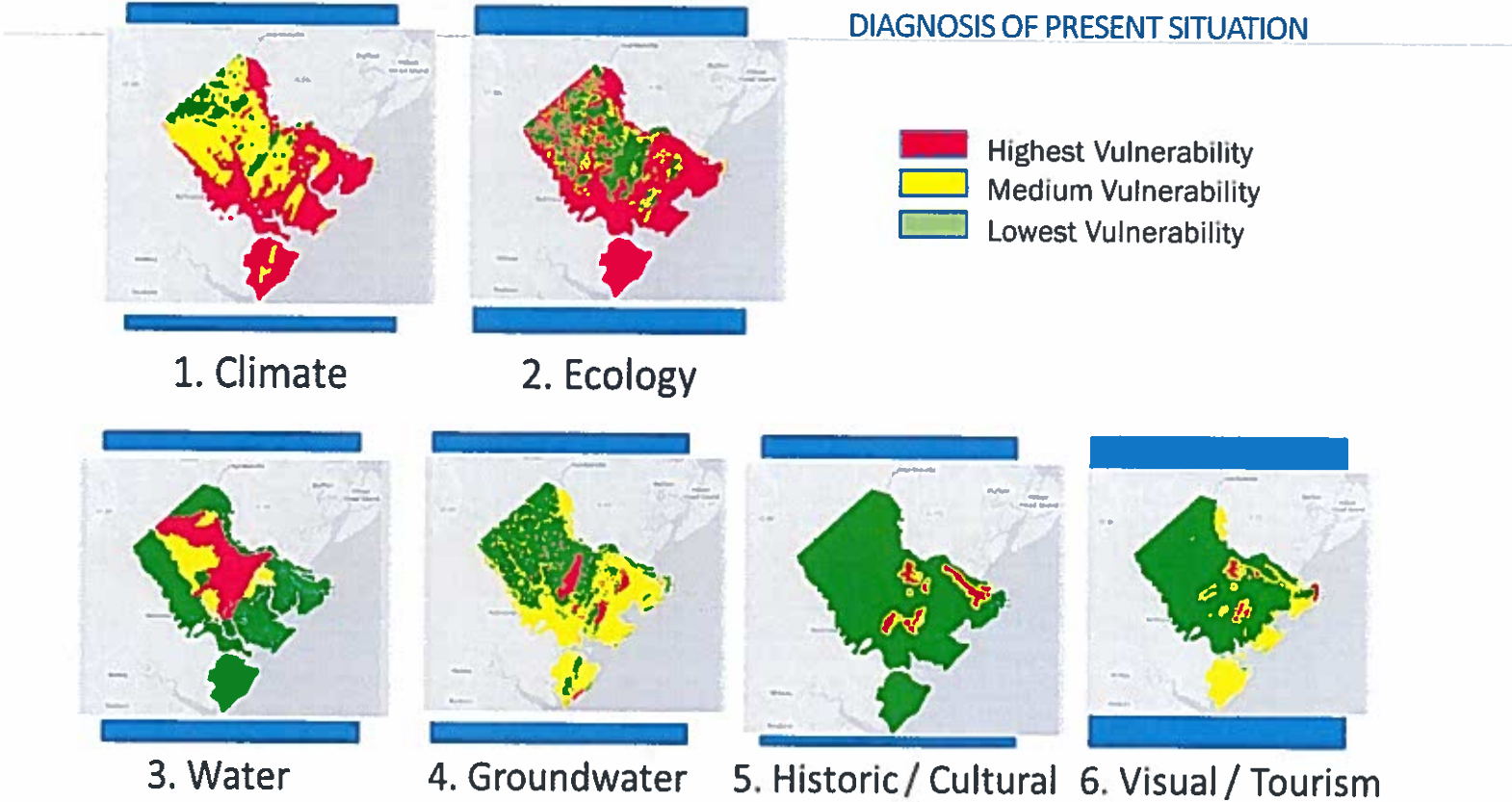
- Master Planning the scale and siting of tourism infrastructure to ensure it is not damaging to the environment and not in conflict with local uses
- Projecting transport, energy, water supplies and waste management necessary to meet tourism industry and local needs
  - Developing response to climate change impacts and sea level rise
- Determining system of tax support to underwrite sufficient infrastructure

# The essential nature of planning

## THE ESSENTIAL NATURE OF PLANNING

- Master Plan Vision
- Documenting Development Trends
- Watershed Threats
- Ecological Services
- Infrastructure Assessment
- Economic, Social, Cultural Assessment
- Tiered Payments for Infrastructure Costs

# Planning Process: Examples of visualization



Source: Dr. Stephen Ervin, Harvard Graduate School of Design



# Challenges for Next Generation Policy Makers

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- Developing analysis approaches that look at specific tourism impacts
  - Balancing environmental and socio-cultural impacts with sustainable development opportunities
  - Gathering solid data on tourism's impacts
    - Mapping where possible and maintaining data on indicators in GIS mapping systems for easy projections into the future
    - Reviewing specific means to manage these impacts according to each part of the industry



## For More Information:

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### Megan Epler Wood

*Director, International Sustainable Tourism Initiative*  
Harvard T.H. Chan School of Public Health



**HARVARD**  
**T.H. CHAN**  
SCHOOL OF PUBLIC HEALTH

*Principal, EplerWood International*



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Rhode Island Commerce Corporation  
 RI Tourism  
 FY 2019 Media Proposal

MEDIA	Monday Start Dates/2018-2019																								Total Cost																																	
	July				August				September				October				November				December					January				February				March				April				May				June												
<b>Paid Media Execution</b>	25	2	9	16	23	30	6	13	20	27	3	10	17	24	7	14	21	28	4	11	18	25	1	8	15	22	29	5	12	19	26	3	10	17	24	31	7	14	21	28	4	11	18	25	1	8	15	22	29	5	12	19	26	3	10	17	24	
<b>Online Display + Video (-7.5/;15)</b>																																																										
Online Display/Video+serving costs	VIDEO																																																\$735,132									
<b>TV (Digital and Cable)</b>																																																										
Streaming TV - Hulu + Connected																																																	\$220,500									
Spot market cable TV (Austin, Denver, Raleigh)																																																	\$498,750									
<b>Paid Search &amp; SEM</b>																																																										
Net media - Search																																																	\$155,160									
Net media - You Tube																																																	\$59,620									
Fee: strategy, implementation, management, front end analytics, monthly reports & recommendations																																																										
<b>Campaign Analytics</b>																																																										
Fee: measurement plan, data compilation from multiple sources, back end analytics, monthly reports & recommendations																																																	\$26,880									
Fee: media strategy; DMA market analysis (if necessary)																																																	\$4,060									
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RDW GROUP

September 25, 2018

Booked  
 Pending





# TOURISM OVERVIEW

RHODE ISLAND COMMERCE CORPORATION

September 28, 2018



## STATE TOURISM EFFORTS

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The Rhode Island Commerce Corporation has a robust and detailed marketing and advertising strategy, including paid search, display advertising, ongoing public relations and social media campaigns that are showing results and bringing visitors to the state.

 RHODE ISLAND  
**FUN-SIZED**



**PAID MEDIA**

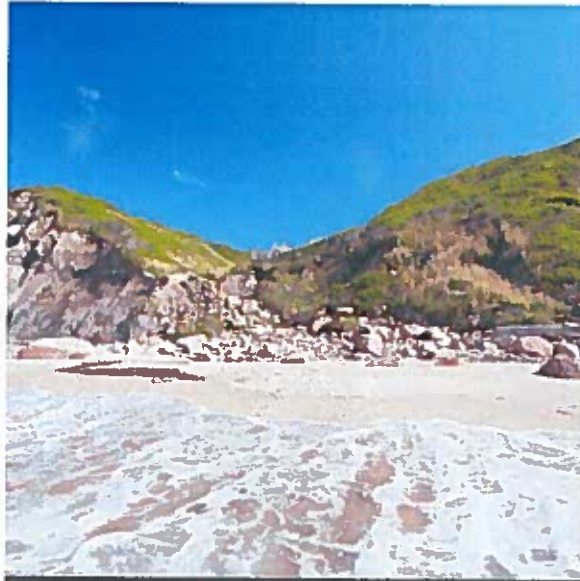
The Fun-Sized paid media campaign has generated **\$2.9M in hotel revenue** to date

8,967 Hotel bookings (654,378 searches);  
5,962 Flight bookings (148,608 searches)

## EARNED MEDIA

In 2018, earned media has produced more than **240 editorial features** across leading publications.

These features generated \$18M in advertising equivalency value (AVE) and over 1B in total impressions.



### CONDE NAST TRAVELER

#### THE BEST BEACHES IN NEW ENGLAND

*"Little Block Island, off the southern coast of Rhode Island, offers an impressive 17 miles of beaches, none more spectacular than this quiet spot on the island's southern reaches."*

(MOHEGAN BLUFFS BEACH, RI)

### FOOD NETWORK

#### 50 STATES OF WAFFLES

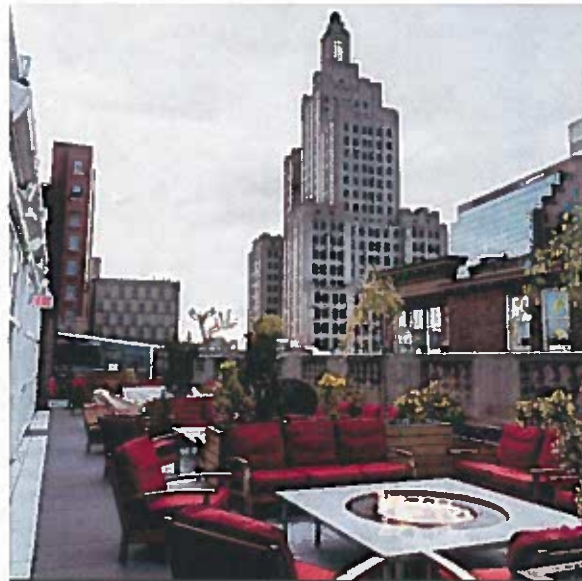
*"Rhode Island's capital city is in the midst of a baked-good renaissance, thanks to top-tier businesses like Rebelle Artisan Bagels, PVDonuts and the matter-of-factly named Waffle, where the liege style reigns supreme."*

(WAFFLE | PROVIDENCE)





# EARNED MEDIA



## U.S NEWS AND WORLD REPORT

### 50 TOP ROOFTOP BARS AROUND THE WORLD

*"Open year-round, the city's only rooftop bar has a retractable glass roof, fire pits and private lounges. Snuggle up with a glass of red wine by the fire in the winter or sip prosecco in the summer. Then, watch the city skyline light up after sunset as you enjoy the nightly entertainment."*

(ROOFTOP AT THE PROVIDENCE G)

## TASTING TABLE

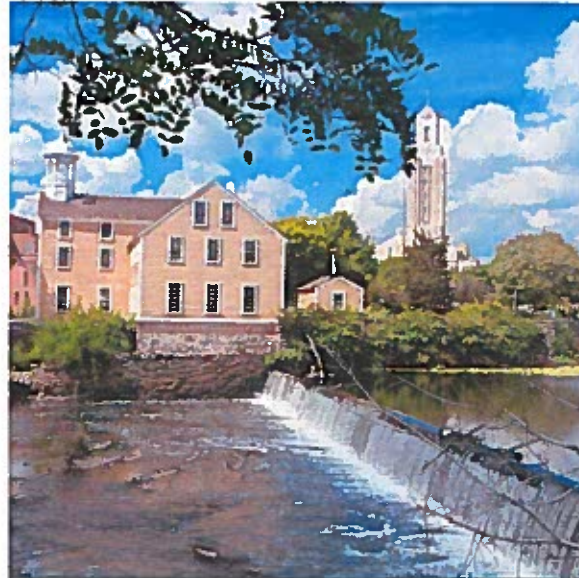
### RHODE SHOW

*"It may be the smallest state, but Rhode island goes big on culinary traditions."*

(AL FORNO)



# EARNED MEDIA



## **BOSTON.COM**

IT'S WATERFALL SEASON.  
THESE 6 IN NEW ENGLAND  
ARE WORTH A ROAD TRIP.

*"The state of Rhode Island may not be very  
mountainous but the Ocean State still has its  
share of falls."*

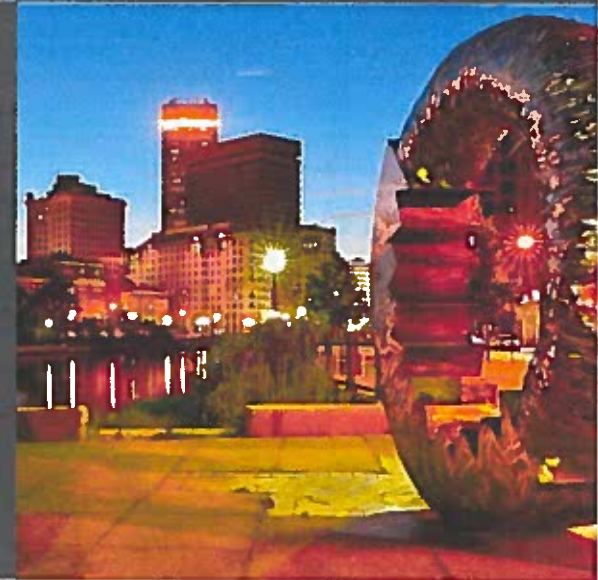
(SLATER MILL HISTORIC SITE)

## **READER'S DIGEST ONLINE**

22 MINI FAMILY VACATIONS  
THAT WON'T BREAK THE BANK

*"Providence is terrific for families, especially  
high school kids since the capital city is home to  
a wide range of colleges (Brown University,  
Johnson & Wales, Rhode Island School of  
Design), where they can get inspired with  
campus tours and on-campus museums."*

(DOWNTOWN PROVIDENCE)



# EARNED MEDIA



## USA TODAY

### 50 STATES: 50 FEMALE CHEFS

*"At the Relais & Châteaux Weekapaug Inn in Weekapaug, R.I., executive chef Jennifer Backman cooks with fresh herbs from the resort's backyard garden and nearby Ocean House's Food Forager to supplement ingredients sourced from nearby Connecticut and Rhode Island farms."*

(WEEKAPAUG INN)

## TRAVEL + LEISURE

### THE 15 BEST PLACES TO TRAVEL IN FEBRUARY

*"The seaside town — known for its Gilded Age mansions and outdoor music performances — is perfect for cold weather getaways, particularly in mid-February."*

(NEWPORT)

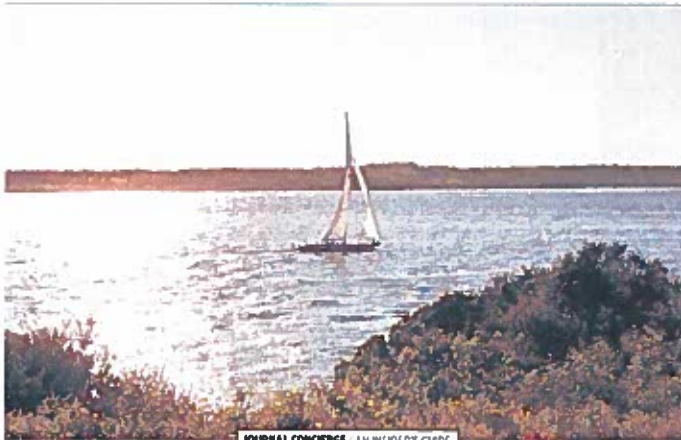


# THE WALL STREET JOURNAL

9/Sunday, July 31 - 22, 2018

THE WALL STREET

## ADVENTURE & TRAVEL



JOURNAL CONCERGE AN INSIDER'S GUIDE

## Newport

This Rhode Island port town isn't all swagger and seaflogs. Here's a peek at its sweeter side

AMERICA'S GILDED-AGE industrialists knew a little about curb appeal, as their Newport, R.I., "cottages" attest. These architectural grande dames, their endless rooms outfitted with museum-quality art and furnishings, endure on landscaped lawns—designed by the likes of Frederick Law Olmsted of Central Park fame and his sons—that sweep to dramatic cliffs and a leisty Atlantic. An additional cache of restored colonial houses make Newport a mecca for "heritage tourists." In summer, the harbor draws droves of gunners, eager to see the phalanx of yachts that idle between outings. Onshore, bars, restaurants and shops, including those on a newly incorporated stretch of Broadway, are easily navigated on foot. As the 1976 travel guide "Popular Resorts and How to Reach Them" put it, Newport "is the fashionable queen of all American watering resorts." Some things never change. —Margot Dougherty



## THE WALL STREET JOURNAL

### NEWPORT

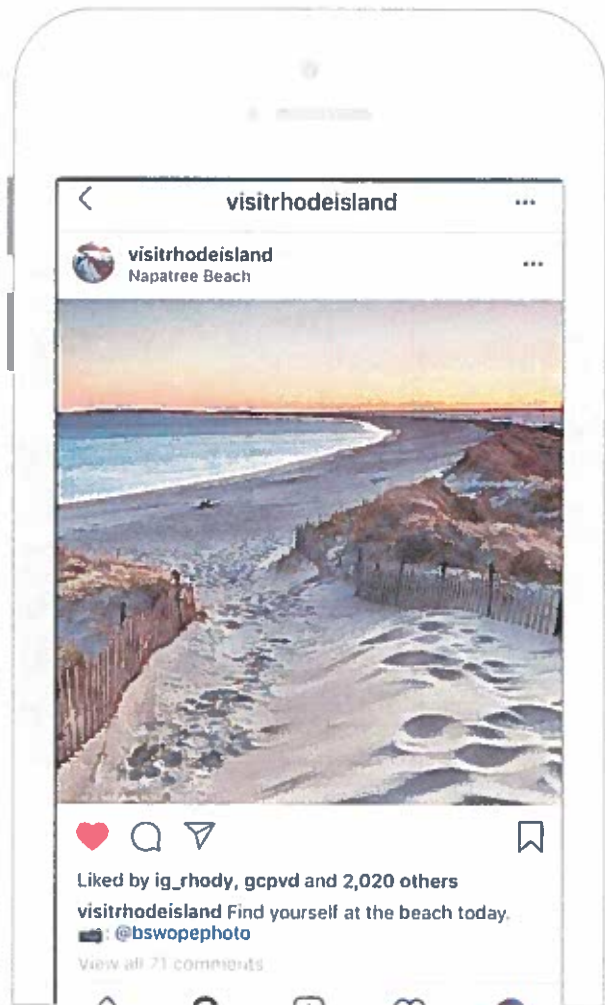
*"Plus, Don't Miss... Cliff Walk* The 3.5-mile oceanfront path starts at Easton's Beach and winds along the shoreline, and the backs of the Bellevue mansions, to Ocean Drive. /*The Attwater* The Lark hotel group's cheery, 17-room boutique is on a small side street, just a quick walk from Bellevue Ave and First Beach and includes great breakfasts. From \$139 a night. [theattwater.com](http://theattwater.com)/Stoneacre Brasserie One of the newer restaurants in town, this handsome spot sources its farm-to-table fare locally and brings the same fresh aesthetic to a creative cocktail menu. 28 Washington Square; [stoneacrebrasserie.com/Newport](http://stoneacrebrasserie.com/Newport)FILM Outdoors The documentary film festival runs through the summer, with screens set up at mansions, parks and working farms. Live music before; Q+A with filmmakers after. Bring a picnic, [newportfilm.com](http://newportfilm.com)"



## WEBSITE

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- Over the past 12 months, the site has welcomed **840K** users totaling about **1,052,074** sessions.
- These visitors are logging on from all over the world, including Canada and the UK, with visible upticks in traffic from Europe.
- Visitors have logged more than **2.4M** page views on our site and the events page consistently ranks among the most viewed.



## SOCIAL MEDIA

- RI Tourism social media platform followership grew by **20%** in the last year.
- Rhode Island hosted **11** social media influencers.
- Total impressions for the year clocked in at **16M** impressions.



## **INTERNATIONAL PAID MEDIA + BRAND USA PARTNERSHIP**

A paid media campaign is being executed to support the direct Norwegian routes in Ireland includes TV advertising, VOD, outdoor media, social, and digital advertising along with press efforts (May – Nov).

Partnership with Brand USA including Thomas Cook Tours Package (online and in store), SEM driving to RI page on Norwegian, UK Multichannel Campaign (Northern Ireland/ Scotland/ UK) includes activations with Facebook, Expedia + Travel USA digital/ print insert, Storyteller Host Video showcasing RI (on Brand USA), USA Discovery (online agent tool training) and Inspiration Guide (inclusion in Travel USA Guide).

# INTERNATIONAL PR EFFORTS

## Rhode Island Partnership with Discover New England – A New England-wide Partnership

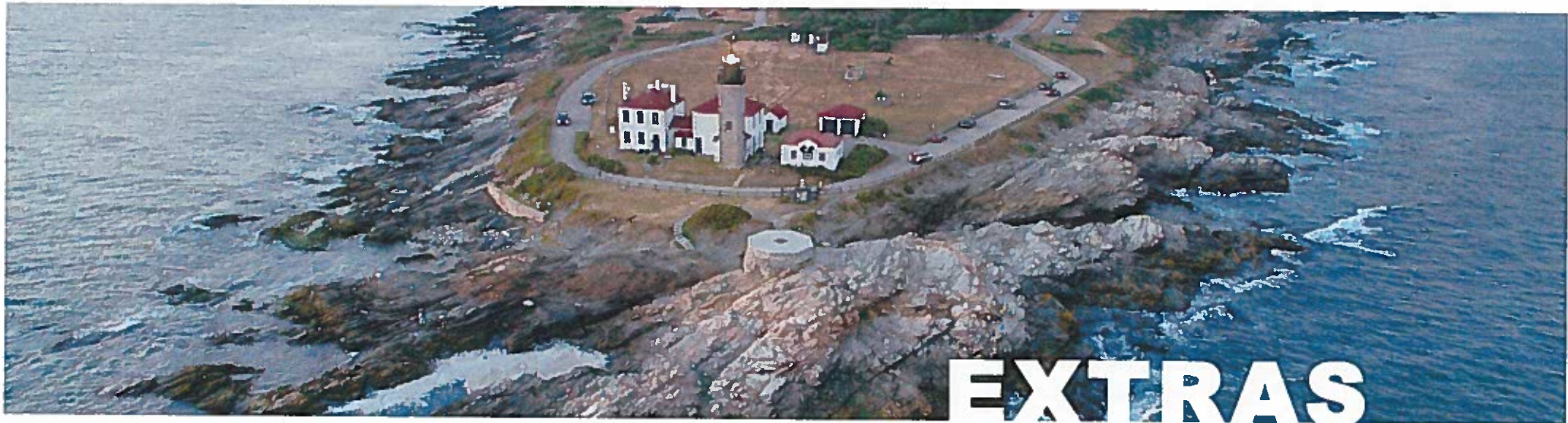
- DNE represents RI in Europe's German speaking countries, Scandinavia, the United Kingdom, Ireland, Australia, Japan, and China
- Tradeshow participation with DNE: World Travel Market, Discover New England Summit, ITB, IPW.
- Consumer show participation with DNE: Dublin, Ireland, Swensen, Norway, Copenhagen, Denmark
- Other: industry in-country training programs, media outreach, marketing trade missions and social campaigns.
- Rhode Island has in-country representation in the UK/Ireland via TTM Ltd., and is promoting direct service from Cork to Providence with Cork Airport's marketing representation, Springboard PR.

## To date in 2018, Rhode Island conducted:

- FAMs for 57 international tour operators.
- FAMs for 16 international journalists whose visits will generate millions of dollars in exposure for the state tourism assets.
- 3 in-state mega-FAM tours of 35 industry influencers from all over the world, including England, Ireland, Germany, Italy, New Zealand, Sweden, and Australia, post DNE Summit.
- 200+ sales appointments with tour product developers and met with and pitched the state to 40 separate media outlets.
- Commerce lead a trade mission to Edinburgh, Leeds and Manchester on September 14-22, with individual appointments with key operators and media.







## THE BIG E

The Marketing Team also manages and operates the Rhode Island building at the Big E annually. The Big E is the seventh-largest fair in the country and the largest fair in the Northeast. More than 1.5 million consumers attended last year's record-breaking fair, which runs from September 14-30 this year. The Rhode Island building showcases the state's many diverse recreational and cultural assets to this massive crowd.

## BRAND TOOLS

Rhode Island Travel Guides have been produced and are being distributed through AAA offices nationwide, hotel rooms in market, consumer and trade events, chambers of commerce and visitor information centers statewide. This year's guide was refreshed for a more modern look and feel, with a new size and layout focusing on vibrant photography, helpful trails and maps and itineraries pointing back to [VisitRhodeIsland.com](http://VisitRhodeIsland.com) for more information. The response has been overwhelmingly positive to the new look and feel of the guide and has been extremely well received by visitor and partners alike.

## WEBINARS

Created the first ever webinar tool for trade. This 11-minute video highlights all regions in an engaging format with notable tourism statistics. The concept is to interest and entice trade groups to keep Rhode Island top of mind when they are selling trips. Results are measurable with viewers served up questions at the conclusion of the video to test their comprehension and knowledge of Rhode Island. They're incented to watch the webinar in its entirety with a trip to the United States for those who complete the video and answer the questions.

