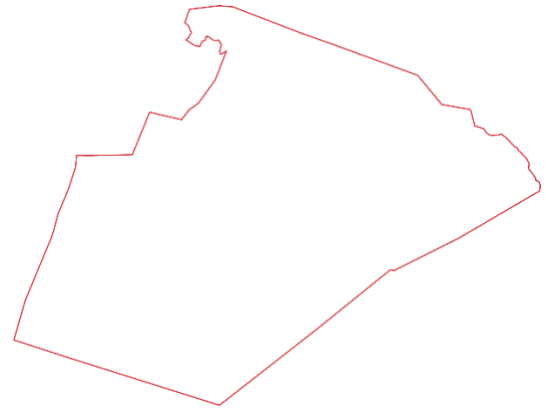


Jones Lang LaSalle Incorporated

Wake County Destination Strategic Plan



10-Year Tourism Plan for Wake County Created in Conjunction with the Greater Raleigh Convention and Visitors Bureau

16 August 2018

The Greater Raleigh Convention and Visitors Bureau and its partners will use this platform as it begins to implement the plan towards *Destination* **2028**.

Executive Summary

As the official destination marketing organization for Wake County, the Greater Raleigh Convention and Visitors Bureau (GRCVB) works to increase overnight visitation to Wake County and the 12 municipalities within it. To further its mission, GRCVB launched a countywide effort to develop a destination strategic plan and build a framework through which destination partners can work together to strengthen the area's destination product and increase overnight visitation substantially over the next ten years. Given the ever increasing competition from other destinations, the destination partners and leaders in Wake County recognized that they cannot allow this destination to become stagnant. Hence, the strategic planning exercise began.

JLL's Hospitality and Tourism Group was engaged to facilitate and lead this countywide effort. The resulting *Destination Strategic Plan: A 10-Year Tourism Plan for Wake County* identifies actions that destination partners in can take to impact overnight visitation along three visitor channels: meetings and conventions, sporting events and leisure visitation. It is meant to serve as a blueprint for the region's destination development, with the County, municipalities, GRCVB and destination partners having collective and individual roles.

Over the last year, JLL has worked to understand the tourism destination ecosystem of Wake County and has identified areas around which the county's destination partners can work to leverage strengths and "move the needle" to increase overnight visitation to the county. Some of these initiatives are already occurring to some degree and merely need support or minor tweaks to evolve the county from being a strong regional destination to one that is nationally renowned and top of mind when deciding on travel options. Others are game-changers that require Wake County, GRCVB, the municipalities and destination partners to adopt new paradigms and consider substantial change to how the community can "sell" the destination. Others are somewhere in between: proactive strategies that will integrate the various threads of Wake County's visitation tapestry and produce results over time.

Some of the recommended initiatives are already occurring and merely need start-up support or minor tweaks to evolve the county from being a strong regional destination to a nationally renowned destination; others are game-changers that require new paradigms; and others are somewhere in between: proactive strategies that will integrate the various threads of Wake County's visitation tapestry and produce results over time.

The resulting *Destination Strategic Plan* (DSP) encompasses all that Wake County and its communities have to offer. Some aspects of the DSP focus on specific demand generators or geographies within the county; others suggest pathways through which each community and partners throughout the destination can help in strengthening Wake County as a visitor destination.

The process to build the countywide DSP is grounded upon three platforms: driving stakeholder consensus; reviewing tourism infrastructure and destination development; and increasing all visitor flows across conventions and meetings, sporting events and leisure visitation. These platforms provided the framework for investigating and formulating a comprehensive strategic plan for tourism development in Wake County.

The outcomes of the DSP are grouped along eight priorities or areas of focus around which Wake County should take action.

DSP Priority Areas



These priorities have informed key recommendations within each visitor channel to measurably increase the number of overnight visitors to Wake County and/or make investments in the county’s tourism infrastructure or tourism service delivery system. In addition to the priorities, the DSP also offers recommendations for leveraging the interlocal funding model and for each municipality within Wake County to identify a path to participate in the future of tourism countywide and take steps individually to strengthen their own destination assets.

Each priority and its respective recommendations are based on the highest and best use of the county’s assets.

Most importantly, JLL was tasked with helping to create a plan that is pragmatic and achievable and that ties together the authentic and distinctive destination brand that Wake County offers. Each priority and its respective recommendations are based on the highest and best use of the county’s assets. Among the key recommendations of the plan are initiatives to renovate and expand key assets in the county that have the potential to

substantially and immediately increase overnight visitation; suggestions of areas where the County should invest in destination assets and visitor-facing infrastructure; strategies to weave together the tangible and intangible qualities of Wake County to extend and grow the destination brand; and an engagement plan to ensure that partners, stakeholders and the broader corporate, academic, and resident communities share in and benefit from the effort to build Wake County’s prominence as a travel destination.

The rationale for choosing the priority areas and the recommendations therein are included in the sections that follow.

The Municipalities of Wake County

In scoping the assignment to help build the DSP, GRCVB was adamant that the resulting plan be Wake County's and that as the county's destination marketing organization it be a resource and convener for many of the activities, but that the plan should not revolve around them.

JLL wholeheartedly agrees with that principle and built a strong process for stakeholder engagement to ensure that the DSP is for the county and integrates the feedback and counsel of those "on the ground." JLL brought its expertise in destination development to Wake County and worked in partnership with the destination to craft a plan that not only sets Wake County up to meet the ambitious overnight visitation goals, but one that also has the best thinking and buy in of those who will ultimately carry it out.

Additionally, JLL has met with many representatives of the municipalities in Wake County. The discussions have led to the desired creation of "tourism plans" for each town that encapsulate their individual development opportunities and potential for collaboration across the priorities of the DSP. These plans will be delivered to each municipality when the rollout of the DSP begins in September of 2018.

DSP platforms

- Driving stakeholder consensus
- Assessing tourism infrastructure and destination development
- Increasing all visitor flows across conventions and meetings, sports and leisure tourism

What's Next: Launching the Plan

Wake County's communities, tourism assets and amenities are unique and diverse. Each community in Wake County has varying opportunities to attract overnight visitors and to contribute to nurturing and growing the destination's assets. The DSP is the culmination of a process of collaboration to create a blueprint for the county's tourism efforts for the next ten years and beyond. Some recommendations are highly prescriptive, drawing on JLL's broad experience in various destinations and knowledge of the critical factors of a destination's success. Other recommendations are meant to be starting points for discussion, recognizing that the leadership and destination partners within the county are the experts in determining the best path. The resulting recommendations are highly achievable because they were built within this spirit of collaboration.

Some recommendations are highly prescriptive, drawing on JLL's broad experience in working in various destination and knowledge of the critical factors of a destination's success. Other recommendations are meant to be starting points of discussion, recognizing that the leadership and destination partners within the county are the experts in determining the best path forward for Wake County.

Throughout the inclusive year-long process, destination stakeholders, leadership and partners expressed consistent, sincere interest and willingness to work together to bring Wake County to the next level and ensure that together they achieve this plan's overnight visitation goals. They sense positive momentum, and many feel that Wake County's time has come and that it is poised to become a destination of the future.

They are eager to be part of an initiative that proactively works to enhance the overall “Quality of Place” of Wake County for residents and visitors alike.

The launch and sharing of this body of work are only the beginning. The true work to mold and transform the destination now begins. In keeping with the spirit under which the DSP was built, the chapters that follow are meant to be a starting point for conversation. JLL offers its counsel and expertise, but more importantly welcomes further feedback, suggestions for improvement and ideas on how to implement the priorities and recommendations detailed in this report.

The breadth and depth of this report are thanks in large part to the candor and expertise of GRCVB and the partner and stakeholder communities it assembled to guide and direct this work. That same level of engagement, investment and collaboration will be needed from all partners if the plan is to be successful.

Summary of DSP Recommendations

■ Meetings and Conventions

Implement the Raleigh Convention Center (RCC) optimization & convention sales prioritization process. A detailed analysis of the RCC determined there is room to increase the facility’s overall impact. To do this, the sales staffs at GRCVB and the RCC need to follow an optimization process to increase utilization and grow room-night generation caused by events there. This is a process that will ultimately lead to an expansion of the RCC and the ongoing development of the surrounding district, including a strategically sized new hotel. It is also important to streamline the sales process through a recommended prioritization strategy. This prioritization process includes a refined booking policy for higher-priority citywide events, smaller high-impact conventions and non-contracted room-night events.

■ Sports

Advocate for an indoor multisport facility to balance the inventory and implement a countywide regional sports cluster model in collaboration with the Greater Raleigh Sports Alliance. With the inventory of fields and courts that exist in the county today, there is an opportunity for the municipal network that exists to deliver large-scale, high-value tournaments. Much of this is done today; however, the model needs to shift to require that anything funded through interlocal taxes be “tournament-ready” with agreed upon standards to ensure the facility is of a caliber that can host tournaments that draw athletes from outside the region. For key venues and facilities, this would also include managing a countywide calendar of availability and the ability to inform and recommend maintenance to the owner or municipality based on feedback from tournament organizers.

Sports continued

In addition, there are new assets needed for Wake County to continue to compete for sports tourism. One specific need is a multipurpose indoor space that could function primarily as an arena, but could also be utilized for other indoor sports tournaments.

■ **Events**

Develop an approach to encourage all municipalities and the County to use key criteria to identify events that have the potential to generate overnight visitation, with the goal of increase the number of such events. This will also include the development of new “signature” events over the next several years akin to the scale and brand recognition of South by Southwest in Austin or Firewater in Providence. These signature events will have a significant impact on both visitation and raising awareness of Wake County as a whole.

■ **Key Attractors**

In collaboration with the N.C. Museum of History, N.C. Museum of Natural Sciences, the North Carolina Museum of Art and Marbles Kids Museum, identify how each of the four, key attractor museums can grow demonstratively more compelling and increase their ability to attract overnight visitors to Wake County. Additionally, support efforts to develop Dorothea Dix Park to be bold, iconic and engaging and provide counsel on visitor-facing elements of Dix Park and their alignment with the DSP goals.

■ **Individual Leisure Travel**

Create a countywide product development effort for growing individual leisure experiences. Today’s leisure vacation traveler is looking for unique, experiential opportunities. Wake County has much to offer visitors, from the local heritage to diverse culinary experiences. The opportunity exists to bring those efforts to the forefront of the tourism landscape by getting involved in and supporting the development of new experiential inventory, through a collaborative program called People-First Tourism (P1t). While this program is not new, the inventory is lacking, and there is room to grow P1t experiences along with experiential offerings from other tour operators in the county.

Recommendations, continued

■ **Destination Development**

Position the development of the county's tourism infrastructure as a component of any long-term planning strategy for Wake County. By developing a long-term plan or set of principles that has buy-in from both the hospitality and development sectors, Wake County will continue to consider and invest in visitor-facing infrastructure and ensure that the destination partners have access to parcels to build destination product that is needed to attract increasing numbers of overnight visitors.

■ **Regional Demand Drivers**

Initiate a collaborative countywide effort to support the ongoing development of the identified regional demand generators, including the higher education institutions, Raleigh-Durham International Airport, the business community and Research Triangle Park. Further supporting these regional assets to continue their growth and leverage their ability to draw their respective visitors into our community, including international travelers.

■ **Quality of Place**

Continue to leverage Wake County's livability as an asset for visitors by connecting with the people and different community assets that embody the area's quality of place. Since Wake County is not yet known for a singular dimension or attractor, begin a process to identify an overall iconic approach that is an authentic extension of the area's brand and that becomes an anchor of a future place-making strategy.

■ **Interlocal Funding**

Improve economic impact measurement criteria for interlocal funding. Wake County's established funding programs have funded a range of infrastructure from small projects to large facilities. This program has made a monumental impact on the tourism landscape of Wake County by reinvesting occupancy and food and beverage taxes. What is needed to refine the interlocal funding effort is detailed criteria on where investment is needed to achieve the highest return on investment (ROI) for the County and its stakeholders. This includes everything from establishing minimum field/court inventories to be considered when assessing viable sports facilities to feasibility requirements for large capital projects. In addition, this includes industry best practices developed by Tourism Economics and endorsed by Destinations International.

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Background

Destination 2028: A Wake County road map to vibrant tourism

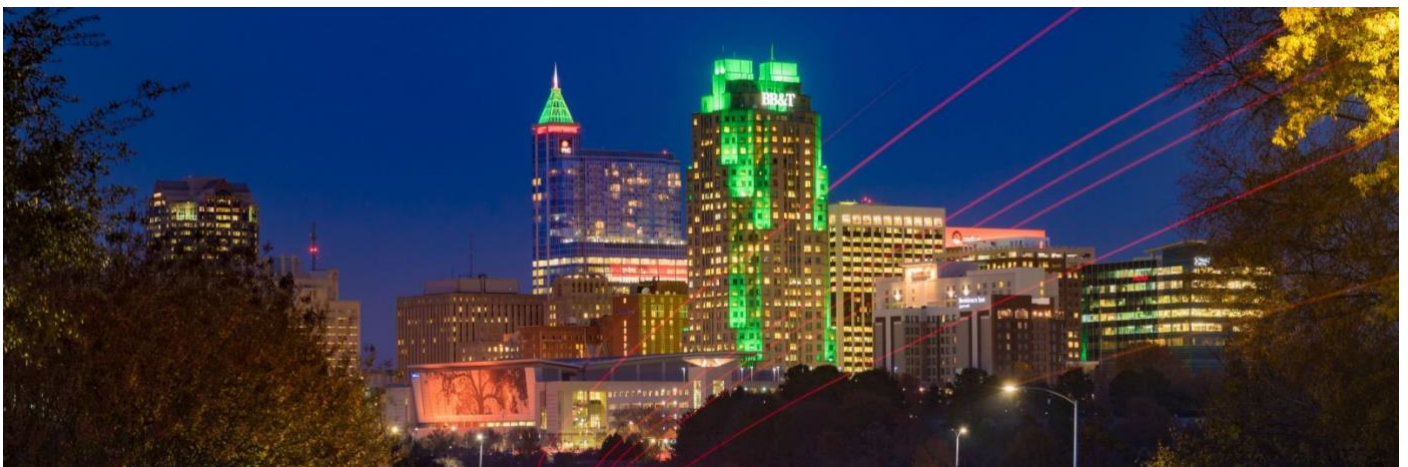
Background

As the official destination marketing organization for Wake County, the Greater Raleigh Convention and Visitors Bureau (GRCVB) not only works to attract overnight visitors to the area, but also seeks to position the county as a dynamic destination shaped by the innovation, creativity and passion of its residents. In doing so, GRCVB tracks trends in the tourism industry and looks to understand where Wake County stands and what must be done to make the destination more competitive.

While Wake County has enjoyed strong visitor growth over the last several years, the destination and community partners in Wake County recognize that they must remain proactive or run the risk of annual visitor numbers flattening or becoming stagnant. Over the past decade, much has been done to build and coordinate countywide partnerships and initiatives to link the destination marketing efforts of the municipalities, GRCVB, partners and owners of destination assets. However, the county has not had any major development in terms of new significant demand generators for more than ten years. Other destinations are making heavy investments in their tourism infrastructure. Expanding or renovating their sports facilities, building or renovating convention centers into state of the art facilities that cater to today's meeting and networking preferences are only two examples. Competition to attract visitors of all types is getting bigger and better and more competitive.

JLL was engaged to ensure that Wake County stays in front of this curve.

In June 2017, GRCVB contracted with JLL to facilitate a countywide effort to position Wake County and its 12 communities as a premier destination in the U.S. Southeast and beyond. The resulting ***Destination Strategic Plan*** has one simple objective: to identify priority areas of focus and specific initiatives that will help increase tourism in Wake County to 21.7 million total visitors by 2028.



The DSP identifies actions that would impact overnight visitation along three core visitor types: meetings and conventions attendees, sporting events participants and spectators and leisure visitors.

From its inception, the DSP has been collaborative and iterative. Throughout the year-long process, JLL received feedback from more than 1,800 stakeholders, worked closely with the GRCVB and destination partners, and sought direction and counsel from a Steering Committee comprised of local thought-leaders. The resulting plan encompasses all that Wake County and its communities have to offer.

While some aspects of the resulting plan are focused on specific geographies or demand generators within the county, the overall plan purposefully looks at ways each of the communities can contribute to the overarching visitor goals. The DSP also suggests pathways through which each community can be engaged in the priorities for the county that are identified in the plan—either to increase overnight visitor flow within their jurisdictions or to benefit from the economic impact of increased visitation in the county as a whole.

The process to build the DSP is grounded in three, complementary platforms:

- Stakeholder consensus
- Tourism infrastructure and destination development
- Increase all visitor flows across conventions and meetings, sporting events and leisure visitation

Stakeholder Consensus

JLL prides itself on providing strategic planning counsel and recommendations that help destinations leverage their unique assets and differentiate themselves to visitors. Our process is based on the belief that a strategic plan will only be successful if it has the buy-in and support of the entire community. Hence, a critical element of our process to craft destination strategic plans is stakeholder consensus.

Feedback from stakeholders, partners and community officials and leaders is a vital part of the process because it provides a context around the data accumulated in the other phases of the project. Stakeholder input is also critical in uncovering the true differentiators of a destination. JLL finds that we are most helpful to our clients when we can marry our overall hospitality and tourism industry expertise with their on-the-ground knowledge of the destination and what partners and stakeholders need to be involved to act on key initiatives and recommendations for tourism development service delivery. We look to create strategies for our clients that build on existing strengths and relationships.

Building a strong stakeholder consensus in the plan development process ensures that we learn from the local knowledge and expertise of the community rather than prescribing solutions that may not have local

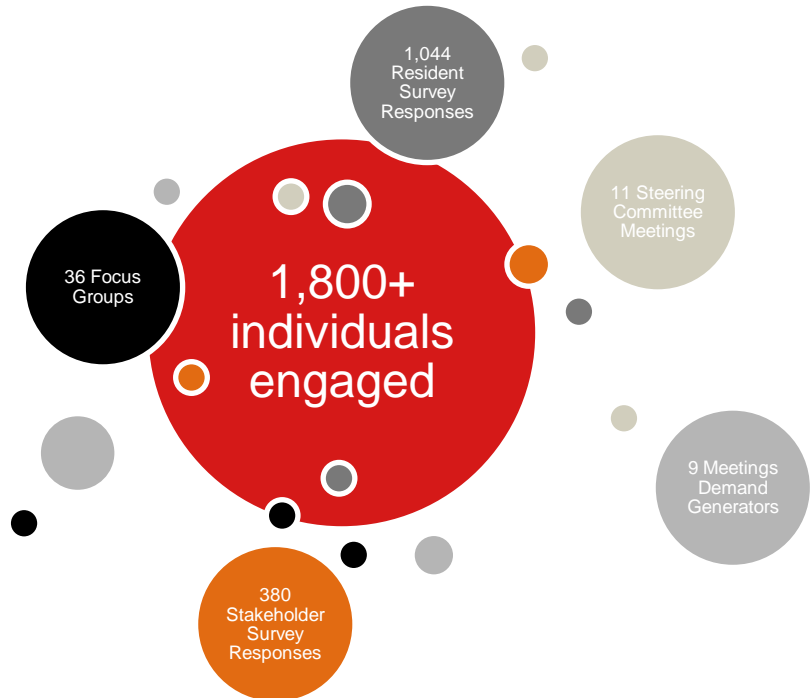
traction or that are unrealistic. Similarly, the input from our rigorous stakeholder engagement often raises issues or nuances that are critical to a thorough understanding of the destination. These insights may or may not be discernible through desktop research, benchmarking or in-market visits.

Given this, JLL undertook five stakeholder engagement streams to better understand the tourism development issues facing Wake County. The effort was designed to be inclusive, as well as ongoing. To ensure a full understanding of the assets or opportunities at hand, some of the engagements entailed multiple meetings or conversations with the entities involved with the given asset or opportunity. JLL also created mechanisms (i.e., sharing contact information and creating an idea submissions/"contact us" form on the project website) to allow stakeholders and partners to contact the project team throughout the strategic planning process. As of June 30, 2018, more than 1,800 individuals were engaged.

During each of the engagements, JLL solicited input on overall tourism assets and strategies that have been conducted (or are being conducted) in the county; perceived gaps or needs in the county's or in an individual community's tourism product; and formulated opportunities that could be pursued on a countywide level to increase overnight visitation.

Especially for the face-to-face engagements, JLL sought to drive meaningful discussions on improvement and opportunities for success in Wake County. JLL firmly believes that this ongoing communication and access for and with destination stakeholders brings out the best dialogue. By having authentic discussions and thoroughly understanding opportunities from the perspective of specific assets and/or the destination's overall capacity to attract and welcome visitors, JLL was able to provide recommendations that are realistic and that best leverage the existing strengths of the destination.

Engaging a Broad Range of Stakeholders



JLL finds that we are most helpful to our clients when we can marry our overall hospitality and tourism industry expertise with their on -the-ground knowledge of the destination and what partners and stakeholders need to be involved to act on of key initiatives and recommendations for tourism development service delivery. We look to create strategies for our clients that build on existing strengths and relationships.

When possible, the JLL project team met with the community leaders in their communities. During all meetings, the outreach efforts were positioned as a medium to engage Wake County tourism industry representatives and key stakeholders in the planning process. The project team reiterated that the DSP is not meant to be the “JLL” or “GRCVB” plan but rather a plan that serves all of Wake County and one that has been developed by and in conjunction with the destination partners in the county.

Tourism Infrastructure & Destination Development

Within this project platform, JLL conducted in-depth research and analysis on Wake County’s assets and amenities. The resulting detailed inventory of those assets and amenities formed the basis for a Situational Analysis. The outputs of the Situational Analysis are objective and subjective evaluations of where Wake County stands as a destination and serve as the basis of the SWOT described in the Current Situation chapter. The work of the Situational Analysis and SWOT informed the priorities and recommendations of the DSP by providing a sense of current strengths and opportunities. More importantly, this platform sets forth a framework to understand the highest and best use of key elements of the county’s tourism infrastructure and gaps in product that may hinder the county’s ability to meet its 2028 visitation goals.

To assess Wake County, the team collected data and conducted on-site visits and tours in conjunction with the Stakeholder engagement described above. JLL’s research, including the Meeting Planner Survey, Stakeholder Survey and Resident Survey can be found in the appendix.

Results of and insights from the inventory development and Situational Analysis are interwoven in the priorities and recommendations that follow.

Increase All Visitor Flows

Easier said than done. GRCVB and the County leadership are taking on an aggressive goal to increase total visitation to 21.7 million by 2028 from 16.4 million in 2017, which is all the more reason to undergo a countywide strategic planning effort. More specifically, the goal envisions generating the increased visitation among three categories of visitors: conventions and meetings, sporting events and leisure visitation. JLL approached the task of identifying strategies to increase visitation in the categories based on the existing strength of the current program:

- **Conventions & Meetings**

The county offers meeting planners an anchor site at the Raleigh Convention Center (RCC) and has five additional meetings districts today. Because it represents the greatest, single opportunity to grow the area's convention and meeting business, JLL conducted a utilization analysis of the RCC. JLL reviewed the current sales activity and produced a plan to optimize the building. In addition, JLL has recommended additional hotel development coordination and a new multipurpose facility that will continue to grow the Meetings and Conventions business throughout the county. JLL also completed a meeting planner survey to inform and align optimization recommendations.

- **Sports**

JLL completed an inventory of all the current sports facilities and talked with operators to understand the capacity for growth. In this process, JLL talked with sports planners for youth and amateur sports in the region to understand their interest in the Raleigh and Wake County market. In addition, JLL tapped into our bank of planners and other sports leaders nationally for additional insight. JLL has included recommendations on sports strategies and potential facility development around the county to enhance this effort.

- **Leisure**

JLL reviewed the current leisure efforts including target markets and marketing spending. GRCVB provided in-depth research and shared data to help the project team understand the visitor profiles that are currently coming to Raleigh and Wake County. In this process, JLL has created very specific recommendations and action items to draw and deliver new leisure and vacation visitors from this initiative.

Current Situation

State of the Wake County Tourism Economy

National Perspective

The U.S. economy has experienced overall positive trends recently, with unemployment down and earnings trending up. Recent indicators show that the economic expansion is accelerating and consumer and small-business confidence remain high. The possibility of further acceleration in economic growth moving forward is very real. The Current Travel Index (CTI), which measures the current direction and pace of monthly person-trips (involving a hotel stay and/or air travel) from the U.S. Travel Association has averaged 51.6 for the last six months for the total market including international, domestic, business and leisure. The U.S. Travel Association's Leading Travel Index (LTI) projects travel growth through October 2018, as both domestic and international travel demand support gains.

According to the U.S. Travel Association, domestic travel overall is anticipated to increase by an average of 2.4% year-over-year through October 2018, and international travel is expected to rise 3% in the same period. There are concerns moving into 2019, because oil prices are on the rise and due to potential increased trade tensions internationally. Lingering international tensions and the national political landscape could affect travel outlooks, but overall the domestic travel economy remains strong with a positive outlook moving into 2019.

Wake County Tourism

Wake County's tourism economy is flourishing. Visitation to the community across conventions and meetings, business, leisure and sports continued to increase in fiscal year 2017-2018 with several new records being set. In 2017, Wake County welcomed a record 16.45 million visitors, up 5.4% over 2016. Those visitors generated \$2.5 billion in direct spending and produced over \$250 million in state and local tax revenues. This saved each Wake County household \$671.

Hotel occupancy outpaced both the state and national average at 69.1%, compared to the state at 63.4% and the national average at 65.9%. In addition, 2017 tax collections related to tourism experienced record-high numbers, pulling in over \$53 million.

Visitation to the community across conventions and meetings, business, leisure and sports continued to increase in fiscal year 2017-2018 with several new records being set. Visitors generated \$2.5 billion in direct spending and produced over \$250 million in state and local tax revenues in 2017, which saved each Wake County household \$671.

These positive outlooks both at the national level and local level support the case for the DSP. The time is now for Wake County to evolve into a next-generation tourism destination. The efforts to implement the DSP over the next 10 years will contribute to growing Wake County's tourism economy to meet the goal of 21.7 million visitors a year. Thanks to the vision and support of the County's and municipalities' elected leadership,

industry stakeholders and community at large, the initiative to undertake this Destination Strategic Plan is the beginning of such an evolution.

Interlocal Fund

As noted above, tax collection related to tourism reached over \$53.4 million last calendar year. These taxes include the hotel occupancy tax and the prepared food and beverage tax. These taxes are set aside to be utilized for interlocal funds with specific usage guidelines set by the State of North Carolina. Wake County Government is responsible for the collection, administration and disbursement of interlocal funds for reinvestment into the community. These funds can be used across four categories:

- Convention Center Complex and PNC Arena projects originally designated in the enabling legislation (Sections 1 and 2 of County Model)
- Other Major Projects expected to promote a high level of tourism activity and overnight lodging needs within the county or are expected to provide a high return on investment (Section 3 of County Model)
- Community-Specific Projects that enhance more localized sports, cultural, arts and other quality of life benefits for county residents; typically associated with “daily” users and participants (Section 3 of County Model)
- Small Projects eligible for funding by the annual small project allocation that competitively awards funds based on a proposal process by Wake County (Section 3 of County Model)

Since the creation of the Interlocal Fund, Wake County has used the monies to strengthen tourism assets that can show their ability to produce a direct economic impact on the community and drive overnight visits. In March 2017, the County released the *Wake County Room Occupancy and Prepared Food and Beverage Operating Principles* (see box on page 17). These 12 principles seek to align the program to disburse interlocal funds with enabling legislation, while providing additional clarity and articulating the value to the community and stakeholders related to the use of the revenues received from these taxes.

While the principles help to philosophically align the county stakeholders on how these revenues can be used, they are not prescriptive. Wake County expressed interest in creating criteria based on the principles around which proposals can be scored and decisions on funding awards could be made. The criteria would also set parameters for measuring the County’s return on investment (ROI).

Wake County Room Occupancy and Prepared Food and Beverage Operating Principles

1. Prioritize use of funds for projects that drive measurable, regular overnight visitation or positive ROI
2. Support and promote the ongoing capital expenditure program and expansion of existing investments in major facilities to keep them current, relevant and competitive in market
3. Comply with all requirements of the existing enabling legislation
4. Ensure project investments are secured by solid long-term plans, both operational and financial, that demonstrate viability and sustainability
5. Utilize high standards of fiscal accountability in planning and managing the use of tax revenues:
 - a. Fulfill existing obligations before entering into significant new financial commitments
 - b. Maintain long-term, conservative financial forecasting
6. Support investments that complement economic development efforts and enhance quality of life experiences for visitors, newcomers and long-time residents
7. Create sports, arts and cultural opportunities, through leveraging community investments and partnerships, that benefit residents and enhance tourism offerings
8. Support a project investment mix that considers location and types of uses (sports, cultural, arts, convention etc.)
9. Engage stakeholders representing varying entities, jurisdictions and uses
10. Ensure that investments support the long-term vision of Wake County and its cities and towns as a tourism destination
11. Provide a regular funding source for eligible projects that require a smaller-scale investment
12. Support investments that consider emerging arts, sports and cultural experiences and unmet needs

Situational Analysis Summary

To gain a full picture of the current inventory of demand generators and destination assets, JLL undertook a Situational Analysis of Wake County. The main objective of the Situational Analysis is to identify current visitor experiences and outline the current strengths and opportunities. The Situational Analysis was conducted through windshield tours of the county, on-site visits and internet research to validate findings. Each of the 12 municipalities was visited during this phase of the project.

From observations made during this process, JLL then created an inventory of assets for Wake County and used the inventory to conduct a SWOT assessment of the area. The inventory notes key attributes and information for each asset and makes notes on aspects that could be improved to enhance the its ability (either individually or as part of a group of assets) to attract overnight visitors to Wake County.

The data and observations collected in the Situational Analysis were used to identify those assets that have the highest potential for enhancing the area's visitor economy. From this, JLL developed the priorities of the DSP, which constitute a highest and best use approach that indicates areas that have the highest potential for stimulating greater and measurable overnight visitation in the county.

From the Situational Analysis, JLL developed the priorities based on a highest and best use approach that indicates areas that have the highest potential for stimulating greater and measurable overnight visitation in the county.

SWOT Assessment

From the feedback received, JLL categorized this information to understand the county's strengths, weaknesses, opportunities and threats as they relate to tourism and future development. This platform provided guidance on future areas of focus for the DSP.



Asset Inventory

JLL also studied nearly 2,000 individual assets and amenities from major museums to small restaurants and shops across the county. This inventory exercise, in conjunction with stakeholder feedback, has guided the DSP priorities, recommendations and action items. Specific outcomes include a sports field and court inventory, an inventory of open/available land for redevelopment, an assessment of the hotel package and pipeline supply across the county, park development and planning and many others.

Sports Field & Court Supply

Given the importance and prevalence of amateur and youth sports activities in all communities in Wake County, the JLL team conducted significant research to create an inventory of all fields and courts, as a comprehensive list did not exist. This inventory includes fields and courts that are both publicly or privately owned. It is important to note that this inventory is not necessarily what is actually utilized for sports tournaments, as not everything in the county is practical for tournament usage.

Field and Course Inventory

Item	Current Inventory	New Planned/ Proposed Supply
Soccer Fields	67	44
Baseball Fields	149	34
Softball Fields	29	
Basketball Courts	58*	16
Volleyball Courts (Indoor)	41	8
Hockey Rinks	8	2
Tennis Courts	358	80
Golf Courses (18 holes)	25	
Table Tennis Tables	30	
Disc Golf Courses	3	
Cricket Field	1	

*includes local schools

Hotel Package and Pipeline

Another key element that surfaced in virtually every conversation about driving overnight visitors was the current level of hotel inventory. While there are roughly 17,000 hotel rooms across the county, many of the smaller communities do not have a branded hotel or a hotel at all. This data point was informative for JLL to understand the current situation and helped community leaders understand what types of asset investments could be needed to spur hotel development. This was true across the board, from large to small municipalities struggling with hotel inventory.

With occupancy in the county hovering around 69%, and the downtown Raleigh market slightly higher at 71%, the hotel economy is relatively strong. As stated above, the county's hotels have outperformed state and national averages in the last year. However, with its respective geography, Wake County has a low hotel inventory compared to other destinations.

With the strong level of growth in the residential population, many parcels available for development are typically geared toward housing. There does not seem to be individual community or a countywide plan for anticipating the need for future new hotel inventory nor for reserving parcels to accommodate the need for growth in hotels. JLL has recommended an approach to coordinate hotel development activities going forward as hotels are a valuable asset, not just to the visitor but also in terms of local tax collection. As an example, over the last four years, the hotels countywide have paid over \$44 million in property taxes, according to the County's tax records.

Hotel Package and Pipeline

Municipality	Number of Hotels	Current Room Inventory	Planned/Proposed Supply
Apex	5	427	n/a
Cary	22	2,620	689
Fuquay-Varina	3	112	n/a
Garner	5	407	85
Holly Springs	1	124	n/a
Knightdale	2	152	112
Morrisville	18	2,095	416
Raleigh	101	10,695	2,304
Rolesville	n/a	n/a	n/a
Wake Forest	3	271	284
Wendel	n/a	n/a	n/a
Zebulon	n/a	n/a	n/a

Quality of Life

Much of the feedback received consistently started with stakeholders and community leaders describing what they love about where they live. This included many of the items included in the SWOT analysis, e.g., affordability, high earning potential or quality job market. In addition to those positive economic factors, many commented on the unique diversity that the combination of a strong concentration of higher education institutions and deep, technology-driven job market has brought to the community. The

diverse background of residents who have settled in Wake County has created a unique spread of high-quality culinary offerings, including everything from food halls to ethnically diverse restaurants to the heritage of agriculture furthering the farm-to-table movement. The DSP process surfaced the correlation of how enhancing Wake County as a visitor destination contributes to the overall enhancement of Quality of Life. This is further delineated in the Quality of Place section of the DSP.

The DSP process surfaced the correlation of how enhancing Wake County as a visitor destination contributes to the overall enhancement of Quality of Life.

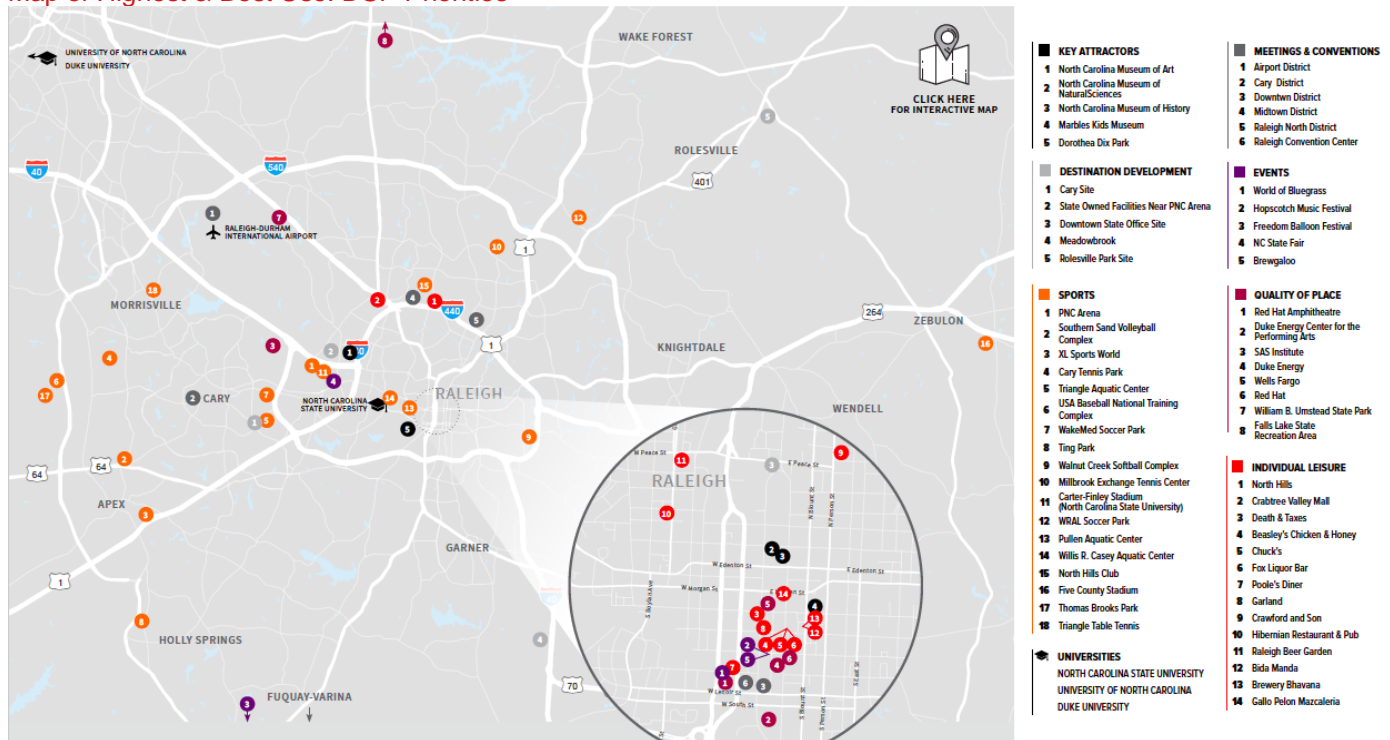
Highest & Best Use – Areas of focus

The asset review, research analysis and stakeholder feedback generated a direction for future focus in the development of current and future tourism assets and experiences in Wake County. These factors and assets are captured in the map on page 25. JLL worked to formulate the map based on stakeholder feedback and the analysis of the highest and best use priorities for the future of Wake County's tourism efforts.

The points of interest included in the map below have become the cornerstone priorities for the DSP. Points of interest are coded based on the priorities around which they are most closely associated:

- Meetings & Conventions
- Sports
- Key Attractors
- Events
- Individual Leisure
- Destination Development
- Regional Demand Drivers
- Quality of Place

Map of Highest & Best Use: DSP Priorities



The map is representative of a final map that will be included in a larger format in the appendix.

These priorities stem from the core objective to support the delivery of growth in total tourism volume to 21.7 million by 2028. As mentioned above GRCVB had three main areas of focus in determining strategies when this process began. These were meetings and conventions, sporting events, and leisure visitation. As the planning process evolved, it became clear that the DSP effort could have the desired impact and effects by prioritizing the efforts and recommendations based on the categories in this map. The following sections provide the platform for each visitor category and respective recommendations.

Destination Strategic Plan (DSP) Priorities

As noted above, JLL used the research, observations, and assessments gleaned from the stakeholder engagement and multiple market visits to identify areas where Wake County’s destination assets could be programmed for their highest and best used. These resulting priorities are areas where Wake County can act to measurably increase overnight visitors and/or make investments in the county’s tourism infrastructure or tourism service delivery system.

The implementation of recommendations related to the priorities will help Wake County achieve its goal of welcoming 21.7 million visitors to the area by 2028. Attaining the ambitious goal will be a team effort. As the destination marketing organization for the county, much of the tactical and marketing work will fall on GRCVB. However, the need for all destination partners—Wake County, the municipalities, the destination assets and tourism industry partners—to be actively involved and to engage in the long-term, strategic initiatives that will strengthen the destination’s competitive position cannot be understated. The DSP and the priorities make up a blueprint for Wake County to strengthen its destination; all partners will need to identify which area they take on and build.

The rationale for each priority and the recommendations flowing from each are detailed below.

1. Meetings & Conventions

Priority Focus

Meetings and conventions stand to be one of the primary efforts of the DSP with the immediate ability to drive results, provide measurement and plan for strategic development to increase return-on-investment.

Municipal leaders and stakeholders recognize the importance of attracting and hosting meetings and conventions throughout the county because of the economic impacts they spur. The 500,000-square-foot Raleigh Convention Center (RCC) is the largest meetings and convention venue in the county. It is also the recipient of the largest investment of interlocal funds for tourism development to date and is one of the largest generators of tourism tax revenues at roughly \$659 million in direct spending into the local economy as of 2018. The RCC is owned and operated by the City of Raleigh.

Given the investments made and the RCC’s status as the county’s largest meeting venue, JLL analyzed the current and potential use of the building, recognizing that optimizing its use will have a measurable impact on increasing overnight visitation to Wake County. Optimization of the RCC means utilizing the available space in a way that is most advantageous to generate the desired impact into the market while generating revenue for the building. This efficient use of space is detailed throughout this section. This optimization exercise also informed recommendations related to the RCC’s renovation and expansion.

In addition to the RCC, there are five meeting districts within the county that are defined based on the surrounding cluster of available major hotels that are capable of hosting in-house meetings (*see box on pages 52-55*). JLL assessed the districts as defined and included them in the Situational Analysis.

Overarching Goal

As meetings and conventions stand to be one of the primary efforts of the DSP with the immediate ability to provide measurement and strategic development ROI, the goal of this priority is to take steps to demonstrate such an impact countywide. The impact the RCC can have on tourism-related taxes, as well as to be a consistent demand generator for new hotel supply is critical. If the recommendations below are adopted, Wake County's meetings efforts will be significantly enhanced.

Raleigh Convention Center Analysis and Future Potential

In an effort to plan for the future, JLL has completed an extensive analysis of the RCC's occupancy, its utilization and the activity level of the joint RCC-GRCVB sales efforts. JLL reviewed data from the GRCVB and RCC's sales teams to determine the current mix of business on the books and future prospects. JLL also broke out the total number of citywide events (i.e., groups requiring 700 hotel room-nights or more on peak) from the totals to illustrate the mix of business that impacts the city as a whole. The following summarizes the findings of JLL's research.

Calendar Analysis

JLL worked with the RCC to do an in-depth look at the historical usage of the space at the convention center to evaluate the most effective approach to optimizing the overall use going forward. Nationally, convention centers benchmark 70% utilization as "practical capacity." Because of the nature of selling and booking such a facility, there are inherent inefficiencies and dates that typically do not sell. 70% is an optimized convention center and should be a target goal for the RCC's future.

Redefined Booking Policy

During this process, JLL analyzed the types of events using the RCC and how those events impacted the building's square footage. In completing this analysis, JLL learned that there was a need to update the RCC's booking policy to better track and prioritize events by size before being able to breakdown the utilization. JLL worked with both the RCC and GRCVB leadership and staff to recommend a prioritization schedule for events by size to measure success in the future.

For purposes of this analysis, JLL has prioritized the events by the recommended types below.

Priority	Group Size	F&B Spend	Rental Spend	Booking Window
Priority One (Full Citywide)	1,500 peak + Full Building Users	\$100,000-\$150,000+	BDF Eligible	36+ months
Priority One (Downtown Citywide)	> 700 rooms on peak	\$75,000+	BDF Eligible	36+ months
Priority One (sports/competition)	> 700 rooms on peak	n/a	Rental + BDF Eligible	36+ months
Priority Two	350-700 rooms on peak	\$50,000	Rental + BDF Eligible	18-36 months
Priority Three	100-349 rooms on peak	\$30,000	\$10,000	12-18 months
Priority Four	< 100 rooms on peak	\$75,000	Flexible	Within 12 months
Priority Five	Non- room-generating	\$33,000	Flexible	Within 12 months
Grandfathered (Allocation of protected space and days held for important county and community events)	n/a	n/a	Minimum	Annual
Industry Cluster Events - All Things Open - Internet Summit	> 200 peak rooms proven	\$100,000+	Rental + BDF Eligible	Annual

“BDF” refers to the Business Development Fund

The priorities within the recommended redefined booking policy will guide both the RCC and GRCVB sales staffs for future booking efforts. This streamlined process will guide staff on holding dates and spaces for Priority One Downtown Citywides before booking other smaller events into the RCC. Following the redefined booking policy will support the effort to optimize the center, as well as generate maximum economic impact into the surrounding community by ensuring higher priority (overnight room-generating) events are the priority in the building.

It is also important to understand the unique needs and dynamics of the destination and the RCC when building a booking policy. JLL worked with the joint sales staffs to understand the kinds of flexibility that should be considered and built into such a redefined booking policy. Those recommended considerations included:

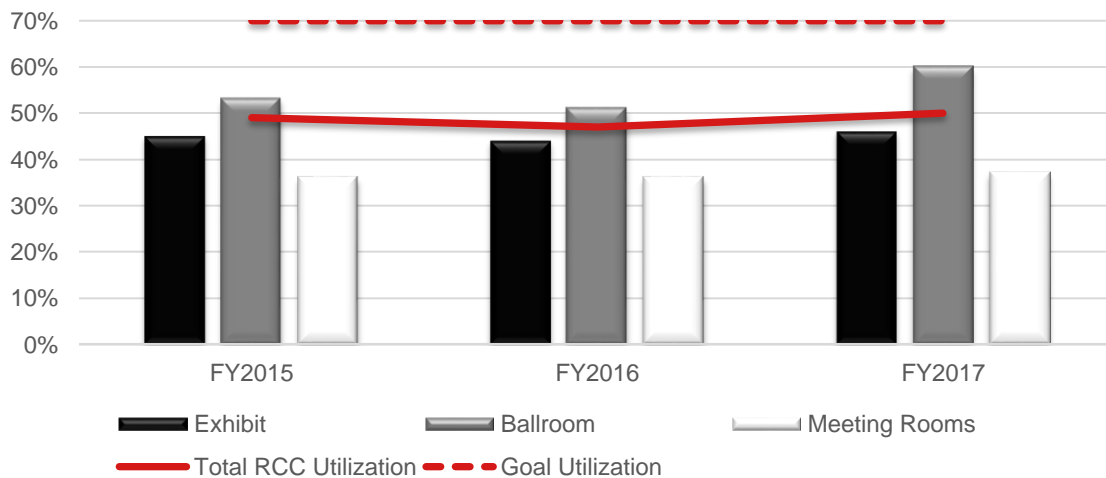
- Once a Priority One (group with over 700 hotel rooms on peak night) is booked, the remaining space should be immediately released for a lower priority to be booked by the RCC sales staff. Because of the nature of the space utilization (detail below), the sales teams will be more efficient in booking the remaining space if the booking window is not held after a first-priority event is secured.
- Seasonality and meeting pattern should be considered regarding the booking window. For example, if the joint sales staffs have an opportunity to book an event that would not qualify as a certain priority because it does not achieve one of the two primary criteria (i.e., hotel room-nights on peak and food and beverage spend), joint sales leadership should have discretion if the pattern is over a time of year that is typically difficult to book, i.e., a 500-rooms-on-peak event only has an estimated spend of \$30,000 in the building but wants to book over the Christmas holiday. This would technically not qualify as Priority Two; however, given the pattern, leadership could make an exception to book within the Priority One window. This would be an opportunity to book a piece of business over a time that is traditionally not filled or is filled with lower-spend, shorter-term local use.
- Total hotel room-nights could be considered in addition to the two primary criteria of peak room-nights and food and beverage spend. This would enable the joint sales staff to analyze a group that either has a longer stay and use of the RCC, generating a similar output to a higher peak room-night group because the group is booked for a longer period of time, thus creating a similar or larger direct economic impact for the destination.

Current RCC Occupancy

JLL analyzed three fiscal years of the RCC meeting and tradeshow space and determined that, on average, the facility's total occupancy is typically around 50% per year. Utilization is defined as the amount of square footage used within the square footage available.

In addition, JLL studied the meeting and exhibit hall occupancy to understand how the spaces were being used. The RCC's ballroom was the most in-demand space across all fiscal years studied, with a three-year average of 55%. The meeting rooms were the lowest utilized spaces (36%), while the exhibit halls were just slightly behind the ballroom at 45%. The RCC's utilization reflects the types of groups that have been booked

Utilization by Space



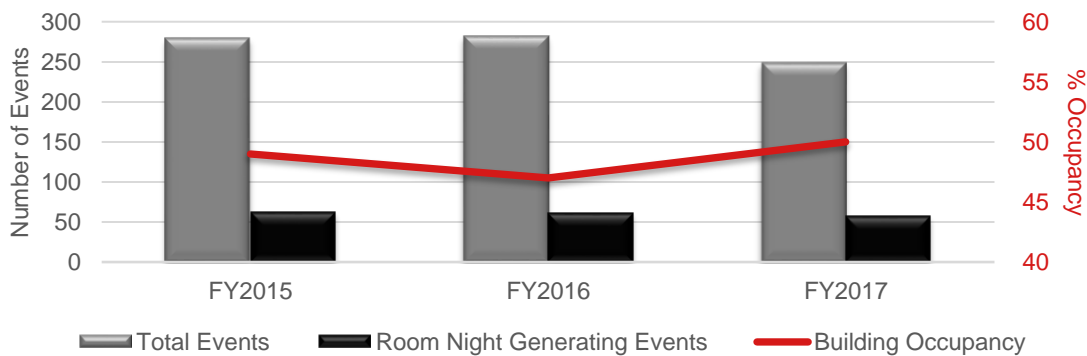
into the facility.

Source: RCC

To better understand utilization, JLL took note of how RCC currently codes utilization by geographic market. On average, 68% of all groups booked into the RCC are coded as local, with 22% representing national and state association groups. The remaining 10% are either regional or international. This process revealed that RCC and GRCVB do not use the same geographic or segment codes for groups. Aligning the two systems would ensure coding is the same for a group's geographic and vertical segment. This will provide important data for future analysis and provide insight into group trends booking the RCC. For example, the usage by "local" groups is not necessarily stating that those groups do not have room nights or generate significant impact. "Local" in this case could also be reflective of the response to the economic downturn, which impacted the conventions industry and did not reach pre-2007 figures until 2015, according to Center for Exhibition Industry Research's Index 2016 report. Additionally, HB2 and other local market conditions effect the joint sales team's ability to book business. With the recommended prioritization in place the utilization by group type, as well as room for growth across markets in future years will become clearer.

In fiscal year 2017 (FY2017), RCC hosted 248 events in total, with 57 events being “hotel room-generating” and achieving a total building utilization of 50%. This was the best performing year, in terms of room night generation and total building utilization, in the three fiscal years studied. FY2017 had fewer total events than the two prior fiscal years. This indicates that the space was used most efficiently in FY2017.

Summary of RCC Utilization FY15-FY17 by Events Occupancy



Sources: RCC & GRCVB

FY2017 also produced the most usage for the RCC with over 87,000 hotel room-nights. Not only did the joint sales staffs outperform the previous years in terms of utilization and space efficiency, the joint sales teams also drove the most overnight room-generating events into the building, amassing a more powerful direct impact from the RCC into the community. This is a trend in mix-of-business and prioritization that the RCC will need to increase to optimize the existing space, as described in the pages that follow.

Current Event Mix and Layouts

In 2014, PricewaterhouseCoopers studied the practical capacity of convention centers and determined that “industry-wide, the ‘practical’ maximum occupancy rate is approximately 70% and the ‘efficient’ range is considered to be approximately 50 to 60%. Occupancy levels less than 50% generally suggest the existence of marketable opportunities or open dates.”

Considering that the overall RCC occupancy in FY2017 was 50%, including internal use, JLL believes there is an opportunity to optimize the RCC’s current occupancy with a goal of 70%. While the RCC has been busy with over 200 events each year, the other important consideration is the achievable and desirable mix of business. Both the maximum occupancy and optimal mix of business should be determined to set future goals for the RCC, as well as inform future planning for the renovation and expansion of the RCC.

Annual “Grandfathered” Space and Days

The RCC has allocated space and days for potential annual events. These events include high school graduations and other important annual activities. For purposes of this exercise, the space allocation at the RCC for “grandfathered” days includes a total of 23 days. Understanding the amount of time and space that is utilized for a grandfathered event helps create the optimization schedule by accounting for those dates and spaces in advance and essentially removing them from inventory. This secures space for the annual events and allows the joint sales staff to understand what available dates and space are left to sell and book around them each year.

To further understand the characteristics of the events at the RCC and the opportunity to increase efficiencies in the use of space, JLL calculated the average use of the spaces by event Priority. An average of this utilization over the last three fiscal years is shown below:

Priority	Group Size	Average Use Days	Average Exhibit Hall Use	Average Ballroom Use	Average Meeting Room Use
Grandfathered (Allocation of protected space and days held for important county and community events)	n/a	11.5	2	1	4
Priority One (Full Citywide)	> 1,500 rooms on peak	4	2	.8	3.7
Priority One (Downtown Citywide)	700-1,500 rooms on peak	4.1	2.2	2.5	16.3
Priority Two	350-699 rooms on peak	3.9	.8	2.8	16
Priority Three	100-349 rooms on peak	3.3	.3	1.3	8
Industry Cluster Event*	> 200 peak rooms proven	2	1	2.7	17.3
Priority Four	< 99 rooms on peak	2.25	.2	1.8	4
Priority Five	Non- room-night generating	1.63	.4	.7	5.3

Source: RCC

The averages above indicate that the Priority One events, including Priority One Full Citywides, have a high usage of exhibit halls and other spaces and that it is unlikely that two Priority One events could be booked at the same time. The combination of one (1) Priority One and one (1) Priority Two events simultaneously is also challenging, primarily because of the high demand for ballroom space. The most likely alternatives for simultaneous use that can maximize the occupancy are: one (1) Priority One or Full Citywide and one (1) Priority Three event; or two (2) Priority Three events.

Since it was identified that it is unlikely that two (2) Priority One events could fit simultaneously, after a Priority One is confirmed, there may be an opportunity to open-up space earlier for smaller Priority Two or Priority Three events in the RCC booking policy as mentioned above. The alternative lay outs were tested with the RCC sales team to confirm the ability of the center to accommodate the suggested simultaneous events.

Based on the average use of Priority One and Priority Three events, these types of event can run simultaneously. Knowing that this is possible, it is reasonable that the joint sales teams could work together after a Priority One booking to layer-in a Priority Three booking even at an earlier timeframe, knowing that the space remaining would work only for this size group. Using this strategy, the joint sales staffs can deliver more rooms to market and have a greater impact on the destination. Given this, JLL developed the goals for simultaneous use at a less-aggressive rate.

Optimization Process

With a goal of determining the potential areas of growth for the RCC, JLL started with a full calendar year of 365 days and reduced the amount of days available based on the number of “sellable” days in the year. This process accounts for non-sellable days, including holidays, and a factor for destination desirability, which accounts for competition in the market.

In this process, JLL worked with the joint sales staffs to make reasonable reductions in available days based on the history of “dark days” on the calendar. After reducing for holidays and other factors, JLL deduced that there would be roughly 335 sellable days in any calendar year at the RCC. Based on the remaining days available to sell, JLL built an optimized calendar of events.

A secondary impact that emerged in this process is the realization that the number of downtown hotel rooms in close proximity (i.e., within three blocks) of the RCC could not support the projected outcomes. In a typical optimization process, JLL goes through a similar analysis to build the calendar, as described above, and the increased impact on hotel room-night generation is also needed. However, in the RCC’s case, there are not enough full-service hotel rooms in close proximity to the convention center. Hence, JLL reduced the optimized goals to support the available hotel room inventory today.

In addition, JLL created an optimization output for three primary scenarios to include renovation of the RCC and expansion. JLL believes that the demand for an expanded RCC exists and supports the City’s effort to do so in parallel with new hotel development. As such, projections have been built around what is possible in that expansion scenario.

All scenarios, starting with the original optimization of the current space, follow below. It is also important to note that any increases in conventions projected with the RCC renovation or expansion will also take into consideration the potential to increase the current available hotel room inventory.

As noted above the RCC and GRCVB leadership created a redefined booking policy to guide the sales efforts to focus on business that will have a greater direct impact economically countywide and on the building's fiscal balance. In doing this, the joint sales teams created "priorities" within the booking policy. Priorities 1-4 are all room-night generating events with Priority Five being the short-term, local bookings with no hotel room-nights expected. Priorities 1-4 have set booking timeframes based on the highest overnight room- generating day in the event, as well as a minimum spend on food and beverage in the RCC. As the following pages describe, these priorities are the foundation of how an optimized RCC can be built.

Three scenarios for possible action were created given the outcome of this exercise. It is important to note that full optimization based on the space available at the RCC is not currently possible because of the lack of available hotel inventory in close proximity to the RCC. For the optimization scenario that is possible with today's hotel package there is balance achieved between efficient utilization of the available space with the desired business mix. Business mix is an important component of all of the contemplated optimization scenarios.

Full optimization based on the space available at the RCC is not currently possible because of the lack of available, close proximity, hotel inventory.

Given this, JLL created the following three scenarios as paths to optimizing the RCC currently, given the available hotel room inventory, as well as increasing the impact the future RCC could have if more hotel rooms were available in the market.

■ **Scenario One**

Optimization of the RCC with Today's Available Hotel Package – In this scenario, JLL built an optimal calendar given the hotel package that is available today. What is different in this scenario from the RCC today is the business mix focus. This scenario relies on the recommended redefined booking policy to focus on citywide business. This is the scenario that JLL recommends until additional inventory is committed in the downtown Raleigh market.

■ **Scenario Two**

Optimization of a Renovated RCC with an Increased Hotel Package – In this scenario, more flexible space is created by converting an exhibit hall into a second ballroom (flexible space), since the ballroom is the most in-demand space and creates the most flexibility in types of use in the building. This enables the RCC to host multiple overnight room-generating groups at once. This scenario also requires additional close proximity hotel rooms be added to within three blocks of the RCC.

■ **Scenario Three**

Expansion of the RCC with an Increased Hotel Package – In this scenario, JLL has contemplated the minimum amount of new flexible space that could be added to the RCC's footprint to increase its capacity

and generate incremental hotel room-nights into the market. As stated above the ballroom is the most in-demand space in the RCC, and at a minimum, that equivalent should be added in an expansion to meet such demands. This would add a full, standalone, second ballroom-sized space and would enable the usage of all three exhibit halls and two ballrooms; this space should be vetted to be as fully flexible as possible. This scenario does not contemplate what is possible in terms of additional meeting rooms or pre-function spaces; this should be determined in greater detail through an architectural study. It is important to note that this scenario also requires additional hotel rooms in close proximity to the RCC. An expansion of the RCC will not be optimized without a suitable addition of hotel rooms added to the downtown Raleigh market.

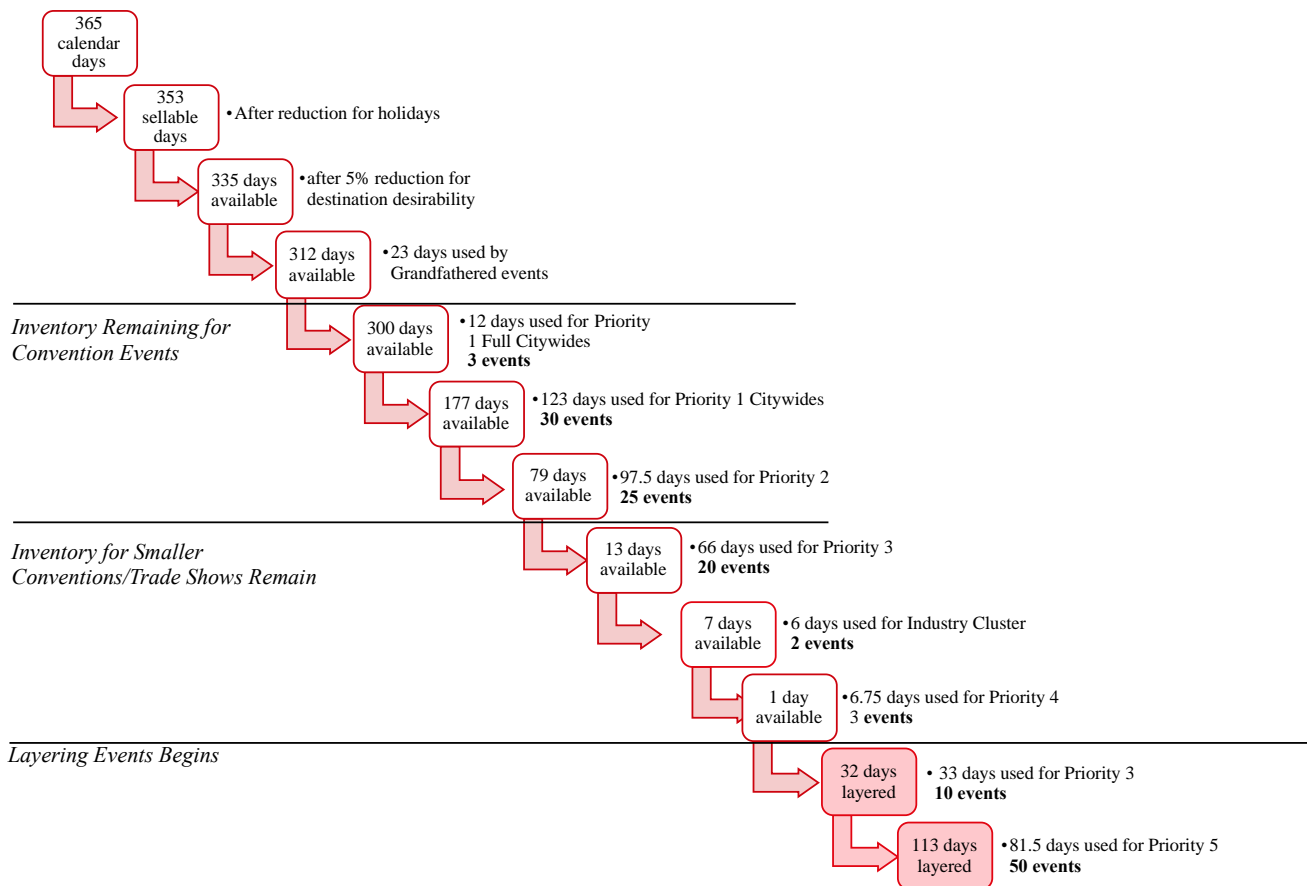
The process for building an optimized calendar has several factors, one of which is a term JLL refers to as “destination desirability.” For purposes of the optimization exercise, destination desirability is defined as a percentage reduction taken from the available days to sell a convention center because of the strong competition in this market. This factor ranges between 2% and over 15% off the available days, depending on the destination. JLL removes those days from the inventory and treats them as dark days, knowing that it is unlikely to fill every day available after major holidays. Given the market size and the amount of dark days in the three-year average, JLL assumes a 5% destination desirability factor for the RCC in the scenarios.

Optimization of the Current RCC

If there were no hotel considerations, optimization of RCC's available days and space could be reflected in the chart below. JLL projected three (3) Priority One Full Citywides, thirty (30) Priority One Downtown Citywides, twenty-five (25) Priority Two events, twenty (20) Priority Three events, two (2) Industry Cluster events, three (3) Priority Four events and ten (10) additional Priority Three events in with the event mix. In addition, there is room for fifty (50) Priority Five events to be layered in the calendar.

As previously noted, achieving the above optimization is not possible given the current lack of hotel inventory. The below level of booking cannot be realized given downtown Raleigh's existing hotel room supply; however, the below illustrates a significant amount of incremental meetings and convention business that could be realized with a complementary inventory of available hotel rooms.

Optimized Booking with Sufficient Hotel Room Inventory



When JLL analyzed the potential output from this exercise, the room-nights generated increased by 106% over the three-year average. However, the projected impact from the RCC would strain the current downtown hotel market's inventory and is not feasible until the hotel situation is addressed.

Hotel Inventory Review

The chart below illustrates the need for additional hotel rooms if the RCC is to enjoy full optimization. On any given day, the downtown market is utilizing 659 of its 928 convention hotel rooms based on the current 71% occupancy rate. If the above optimization schedule was achieved (assuming with 30 citywides per year and an overnight room-generating event total of 96 or a 60% increase), the hotel inventory in close proximity to the RCC would be over capacity. Additional hotel rooms will need to be developed.

Convention Hotel Demand with Optimization



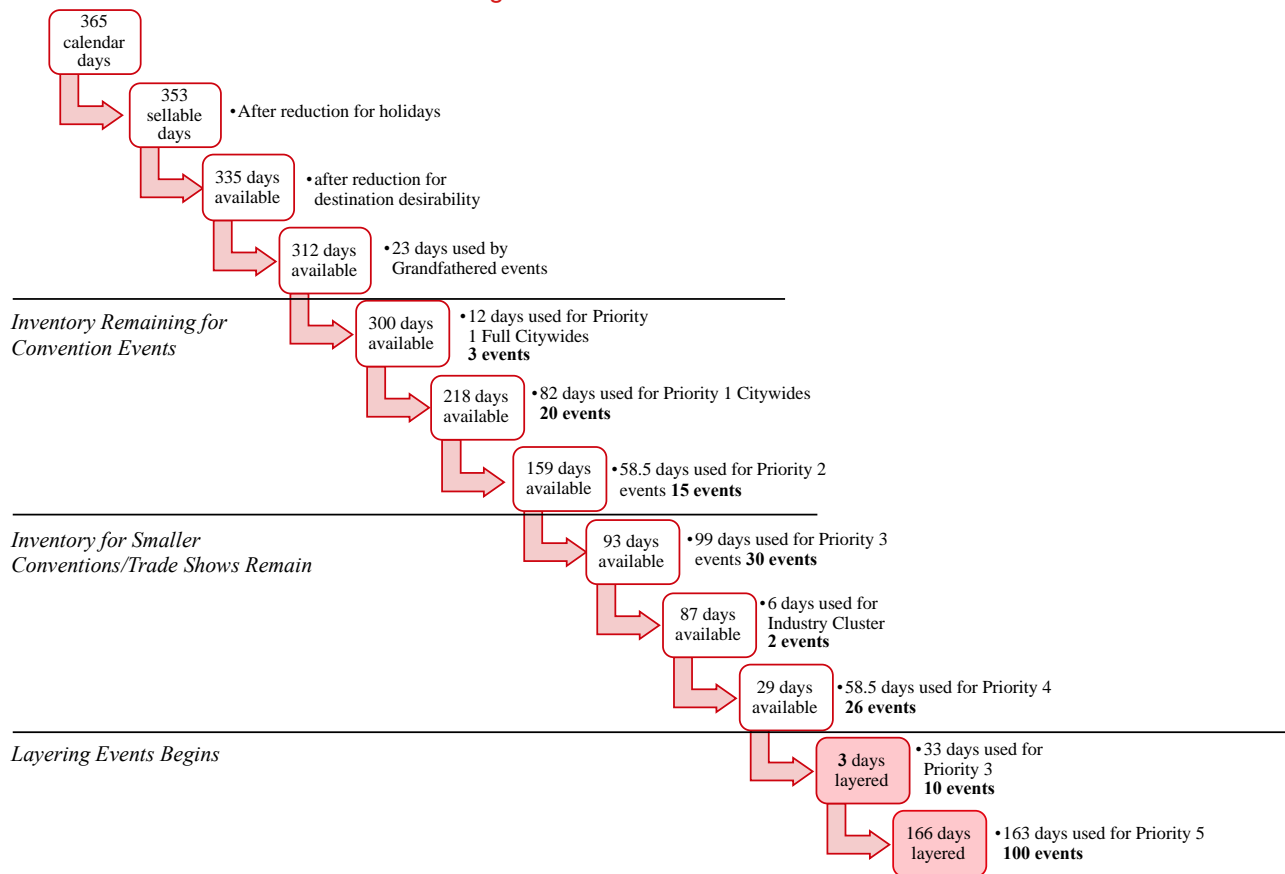
Marriott City Center: 400 rooms, Sheraton: 353 rooms, Residence Inn: 175 rooms

Because of the constraints on the existing hotel inventory, JLL revised the optimization calendar to account for the current hotel availability. This ensures the optimization goals are realistic until the hotel situation is addressed. Potential scenarios for what could be achieved given the status quo and into the future assume an evolution of the space in and around the RCC and are laid out in the following pages.

Scenario One: Optimization of the Current RCC with Today's Available Hotel Package

As illustrated in the out below, JLL assumes the same baseline number of sellable days at 335 per year. JLL projects three (3) Priority One Full Citywides, 20 Priority One Downtown Citywides, 15 Priority Two events, 30 Priority Three events, two (2) Industry Cluster events, 26 Priority Four events and 10 additional Priority Three events layered in with the event mix. In addition, there is room for 100 Priority Five events to be layered in the calendar in the scenario laid out below.

Optimization Based on Current Hotel Package



Because of the constraints of the existing hotel package, *this modified optimization schedule will achieve desired efficiencies in utilization of the spaces; however, the room-night generation and subsequent economic impact will be lessened compared to the original version shown on page 36.*

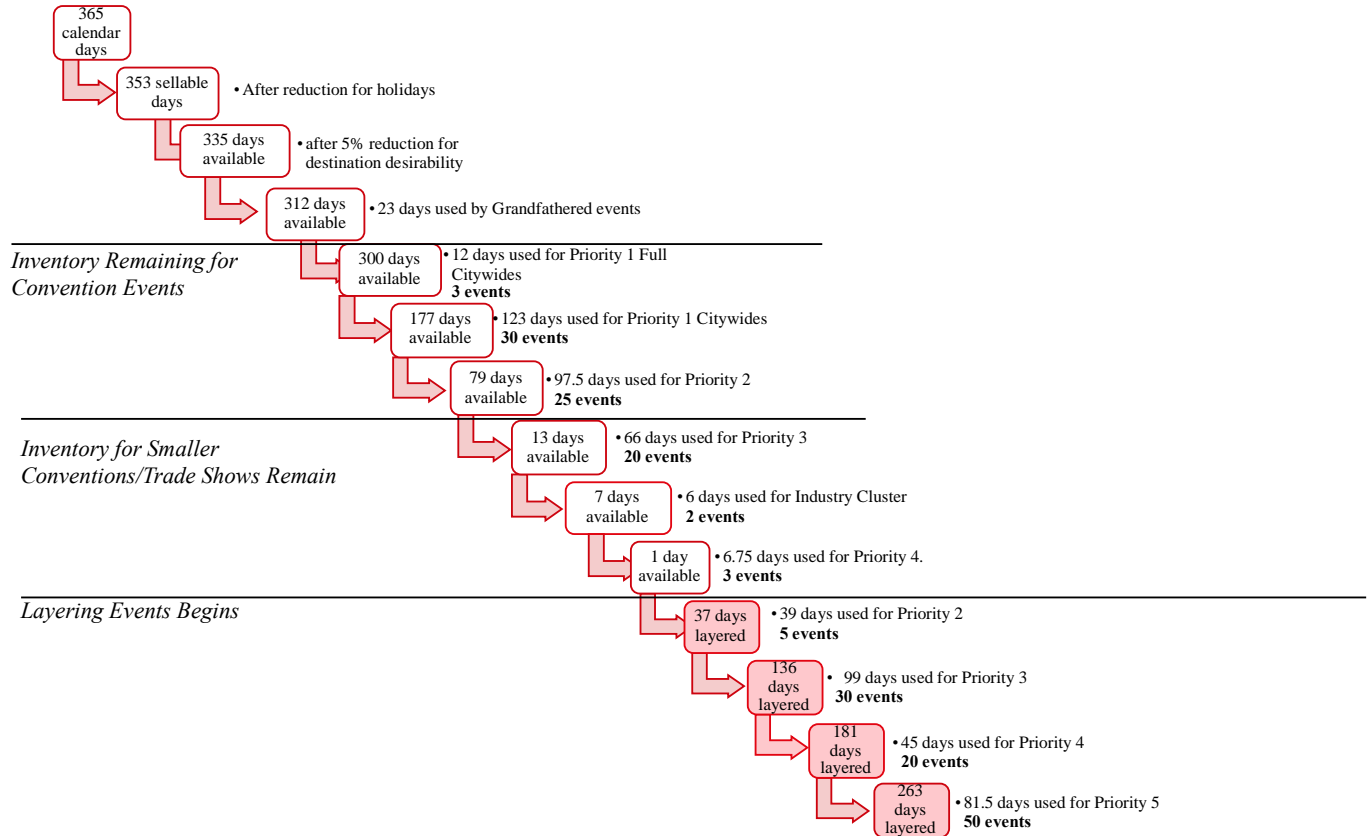
Scenario Two: Optimization of a Renovated RCC with Increased Hotel Package

After projecting usage given the current hotel package and current state of the center, JLL considered how a renovation or expansion of the RCC *and* a complementary increase in hotel rooms could impact optimization. JLL understands the City's interest in a potential expansion and supports exploring the expansion further. There is sufficient demand for an expansion based on the market size, increased airlift and increased ground transportation infrastructure to deliver new and additional conventions to the market.

As noted above, based on historic utilization, the ballroom is the space with highest demand. At a minimum, JLL recommends the City investigate adding flexibility to an existing exhibit hall by renovating the space to function similar to a second ballroom. This is a very popular trend in the convention center industry. The exhibit hall space renovated for increased flexibility would enable the RCC to host a Priority One Full Citywide with a Priority Two event, as well as the ability to host two (2) Priority Two events simultaneously. This kind of conversion anticipates a mix of business including sports groups. To that end, the renovation/conversion should also contemplate retractable bleachers and additional portable courts to support a variety of indoor sporting tournaments and events.

JLL assumes the same baseline number of sellable days at 335 per year. JLL projects three (3) Priority One Full Citywides, thirty (30) Priority One Downtown Citywides, twenty-five (25) Priority Two events, twenty (20) Priority Three events, two (2) Industry Cluster events, three (3) Priority Four events and five (5) additional Priority Two events, thirty (30) additional Priority Three events and twenty (20) additional Priority Four events layered in with the event mix. In addition, there is room for fifty (50) Priority Five events to be layered in the calendar in this scenario.

Optimization Based on RCC Expansion and Increased Hotel Package



JLL recommends that this scenario include increased divisibility, hydraulic lighting and other fixtures that may be needed to add flexibility to utilize one of the exhibit hall spaces as a second ballroom. It is recommended that efforts to plan for and design this phase of optimization begin within the next two years with a feasibility study and be implemented by year-5. This further vetting of design will ensure the ability to book and layer groups and proposed in this scenario.

Scenario Three: Expansion of RCC with Increased Hotel Package

In addition to optimizing the RCC today, JLL suggests consideration of an expansion of the footprint to further grow the impact of the RCC to accommodate ballroom, sports, small networking and other exhibit-hall activities as the third phase of optimization. JLL recommends the City utilize the process that has occurred within the DSP effort: contract with a convention center architect to design an expansion that considers overall flexibility first and including at a minimum one (1) full, additional, ballroom-sized space, as well as additional multipurpose space for breakout and meeting space. JLL recommends that expansion as part of overall optimization be studied by an architect to vet and be implemented by year-8 of the DSP, with plans solidified by year-6.

Summary of Optimization Scenarios

The scenarios for RCC’s optimization described above contemplate a phased approach from today’s potential through a near future expansion to deliver an impactful result into the market. Under Scenario One (i.e., optimization with the existing hotel package), the RCC’s room-night generation would increase by 54% over the current three-year average and reduces the overall number of events. This kind of efficiency should be the goal for RCC use going forward. The trend continues in future years with the addition of hotel capacity and a renovation and expansion. Estimated cost figures for Scenario Two range between \$4-6 million, while expansion costs could range from \$200-\$250 million depending on the final determination of space needed.

The graphic below summarizes the projected output of Scenarios One and Two in terms of room-nights and the business mix within the RCC. Scenario Three will not be projected until the full amount of space in the expanded RCC and number of hotel rooms are determined through a feasibility process with the City. However JLL has confirmed the market demand and believes the impact would be significant.

Summary of Scenario One and Two Output

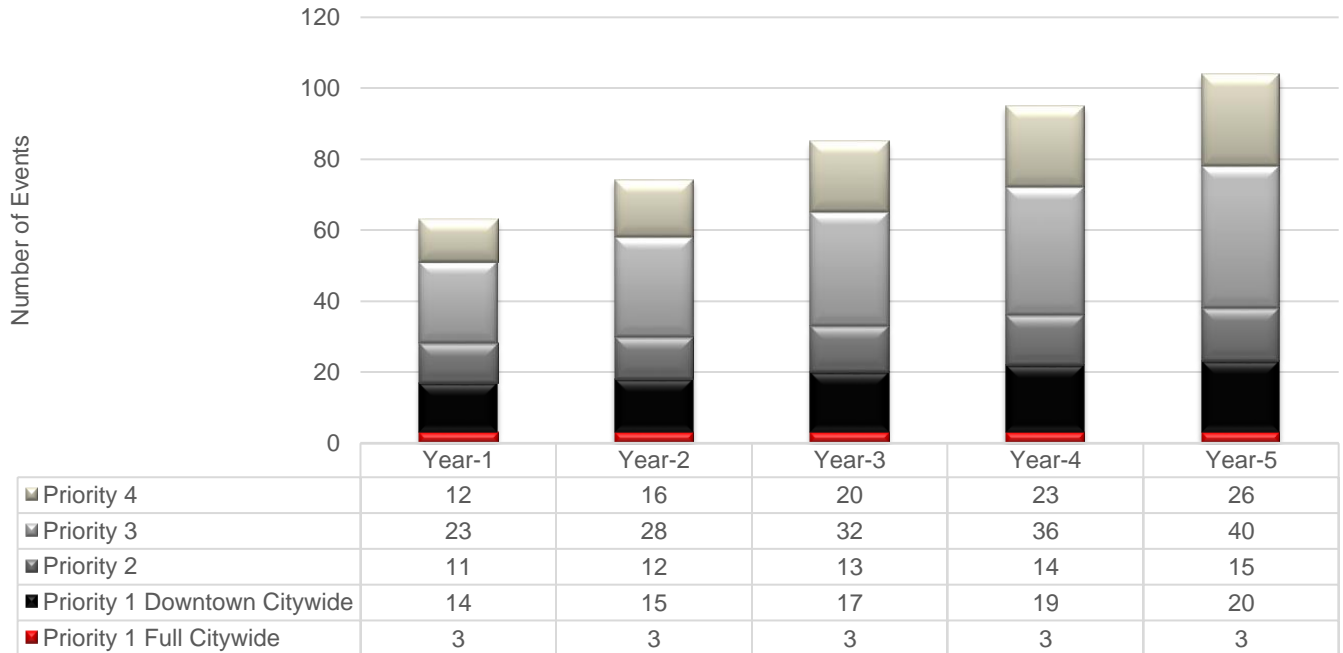
Today			Scenario 1: Optimization of RCC with Today’s Available Hotel Package			Scenario 2: Optimization of a Renovated RCC & Increased Hotel Package		
Priority	Number of Events	Room Nights Generated	Priority	Number of Events	Room Nights Generated	Priority	Number of Events	Room Nights Generated
Total	279	72,448	Total	198	111,267	Total	195	175,746
% change	-	-	% change	-29%	+54%	% change	-30%	+143%

RCC Sales Goal Setting – Sales Direction for the Future

Knowing that today’s hotel package is limited, JLL recommends setting joint RCC sales goals between the RCC and GRCVB sales staff at the Scenario One level. JLL recommends that the joint sales teams collaborate on the potential goals with GRCVB responsible for events with room-nights 12 to 36+ months from the booking date (Priority One through Priority Four) and that the RCC's sales staff be responsible for events without contracted room nights within 12 months of the booking date (Priority Five).

JLL has prepared a five-year glide path to achieve the optimization goals including targets for each Priority every year. The following chart illustrates the recommended sales goals and glide path from year-one to year-five. Given acceptance of the DSP in August 2018, year-one below begins in fiscal year 2019-2020.

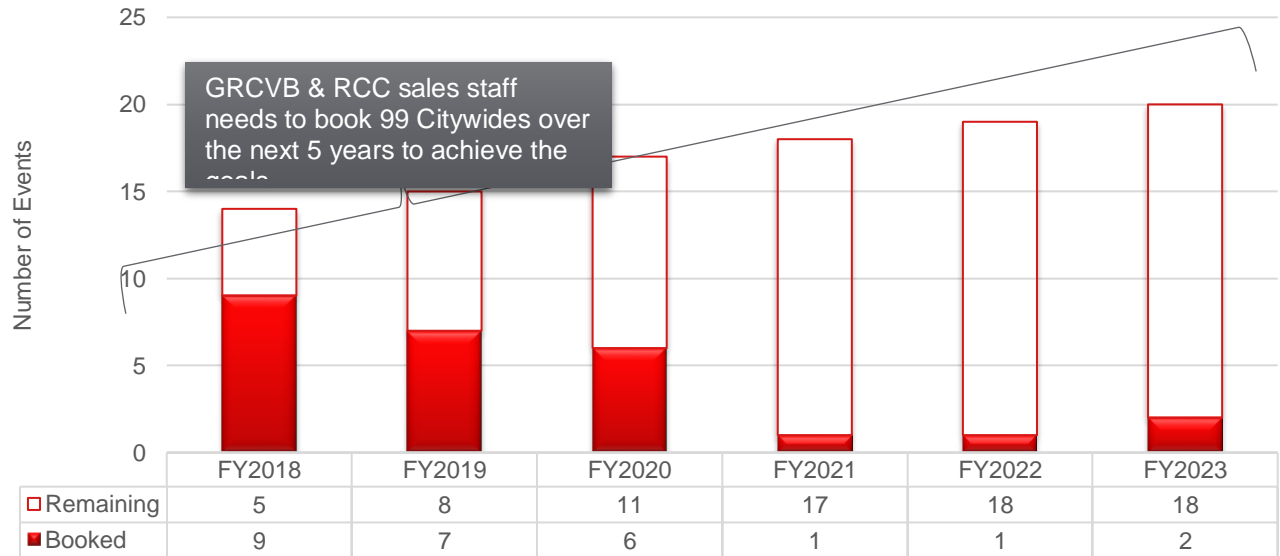
Five-year Glide Path to Goals



The above glide path represents RCC’s desired mix of hotel room-night business. Optimization of this scenario, with today’s hotel package, grows the overnight room-generating number of events from 60 to 104.

In addition, JLL has broken out a glide path to achieve the Priority One Citywide figure separately to further refine the sales activity needed to achieve such goals. JLL worked with the joint sales staffs to understand what level of Priority One Downtown Citywides are already on the books for future years. The definite Priority One Downtown Citywides booked into future years are laid out against the booking goals in the chart below.

Progress to Priority One Citywides



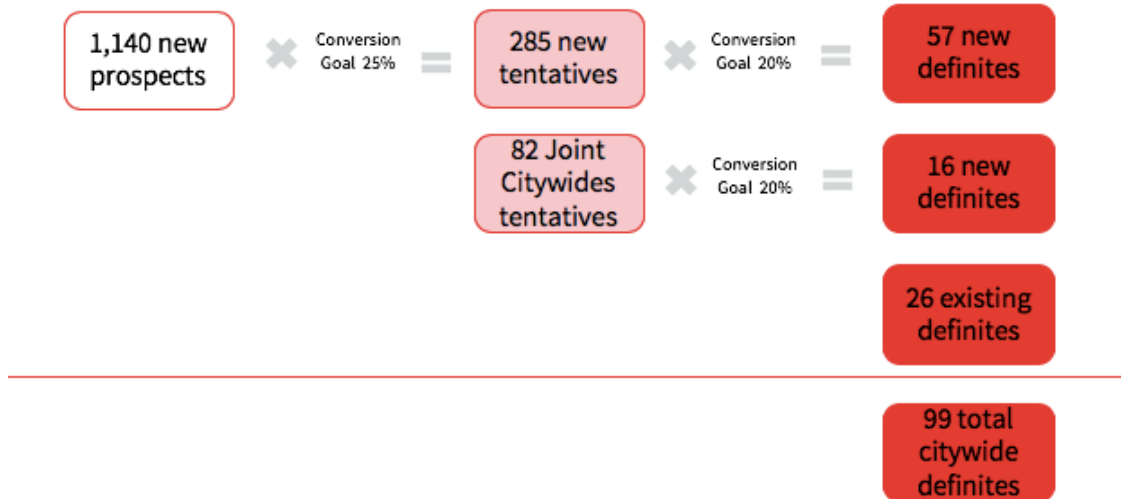
Sales Activity Needed

To achieve the goals shown above in a five-year period, the GRCVB and RCC teams will need to generate enough sales activity to produce the desired results. Sales activity includes prospects, leads, tentatives and definites, known as the “sales funnel.”

JLL recommends that the GRCVB and RCC joint sales teams enhance the prospecting reporting process in the future to include data measurement on key performance indicators (i.e., attendees, hotel room nights, dates). Further engagement in prospecting activity creates a clear understanding of the activity level needed to achieve the multiyear goals. A prospect is defined as a convention or meeting that has been identified by the sales team as in alignment with a set of key performance indicators. A prospect would generally not have space held at the convention center or a lead sent to the hotels. The active tracking and engagement in prospecting activity creates a clear understanding of the activity level needed to achieve the multiyear goals.

At the time of the writing of this report, there are 99 Priority One Downtown Citywides that would need to be booked in the next five years to achieve the booking goals. In that same time frame, there are currently 22 Priority One Citywide events in the system as definites. There are also 82 existing tentatives in the system. The following is an illustration of the sales activity level that will be needed to maximize the RCC through booked and hosted business.

Sales Activity Needed for Optimization



The visual above illustrates the need for the joint sales teams to refine current prospecting efforts to align with the recommended optimization strategies to achieve the proposed booking goals. Using this method, JLL has estimated that the joint sales effort needs 1,140 total prospects for overnight room-generating events to achieve the total booking goal over the next five years.

Currently, GRCVB manages data prospect activity as “traces” in the system against accounts with potential to book the RCC, as well as other in-hotel business. The GRCVB has prospecting efforts currently underway, including individual sales manager goals of 20 defined prospecting calls a month along with other sales activities (e.g., tradeshow, presentations, sales missions, FAMS, professional industry membership organizations, etc.). In 2017, GRCVB had a significantly high level of prospecting activity with over 1,100 active accounts in the system. JLL believes that including detailed meeting profile data will give GRCVB the ability to track progress against these goals.

As mentioned above, JLL recommends that the joint sales teams collaborate on the most effective next steps in achieving the sales activity, with GRCVB responsible for events with room-nights 12 to 36+ months from the booking date (Priority One through Priority Four) and RCC's sales staff being responsible for events within 12 months of the booking date (Priority Five) that do not have contracted room-nights.

Optimization Impact on Tax Collection

When RCC is optimized under the possible scenario with today's hotel package (Scenario One), the City and County's ability to collect hotel and prepared food and beverage (F&B) tax on those rooms and attendees increases by 27%, to a total of over \$1 million annually, as shown below.

Optimization Impact on Tax Collection

RCC Optimization Scenarios Impact on Annual City Tax Collection													
Scenario	Rooms Generated	ADR*	Hotel Room Revenue	Room Tax Levied	Room Tax Collected	Estimated Rooms Attendees**	Estimated Non Room Attendees	Rooms F&B Spend***	Non Rooms F&B Spend***	F&B Tax Levied	F&B Tax Collected	Annual Total Tax Collected	% Change Over 3-Year Avg.
3-year avg	82,390	\$ 149	\$ 12,276,110	6%	\$ 736,567	116,590	273,535	\$65	\$35	1%	\$ 171,521	\$ 908,087	-
Scenario 1: Optimization with Today's Available Hotel Package	111,267	\$ 149	\$ 16,578,783	6%	\$ 994,727	157,453.81	147,857	\$65	\$35	1%	\$ 154,095	\$ 1,148,822	27%
Scenario 2: Optimization with a Renovated RCC and Increased Hotel Package	175,746	\$ 149	\$ 26,186,154	6%	\$ 1,571,169	527,238	147,857	\$65	\$35	1%	\$ 394,455	\$ 1,965,624	116%

*GRCVB Source Data

**Attendees per room night ratio 5.3 over 3-year average, reduced in scenarios to 3 as mix of business is projected to change

***Blend of Destinations International and GRCVB Source Data Convention Attendees Spend Per Room Per Day

Optimization Impact on RCC Revenue

When the RCC is optimized within the possible scenario (Scenario One), overnight room-generating events increase by over 50% with the majority of revenue coming from Priority One Downtown Citywides. Overall gross revenue increases by 16% to over \$7.7 million, due to the increase of Priority One events with strong revenue. In addition, the average RCC room-nights output also increases by over 38,000 new, incremental, hotel room-nights. New incremental hotel room-nights in the optimized model would annually generate nearly \$6 million in new hotel rooms revenue and an estimated \$350,000 in associated hotel occupancy tax revenue.

Sales Activity Summary

The development of the five-year glide path for goals has identified many opportunities for the future. These include utilizing the refined RCC booking policy to optimize the RCC space, as well as the need to redefine the prospecting sales activity. In addition, JLL recommends that shared sales management and meeting space software be utilized for the joint sales teams to work more seamlessly together. This would include GRCVB staff receiving "read-only" access, at a minimum, within Ungerboeck (RCC's software system) to review the RCC calendar for date and meeting space availability.

An optimization process is a strategic undertaking, and GRCVB, RCC and City of Raleigh alike need to be aligned in their collective effort to achieve the sales, revenue and direct economic impact goals as a result of such a process.

Importance of Downtown Raleigh Hotel Package

As mentioned above, all the scenarios contemplated, with the exception of Scenario Two, require additional downtown Raleigh hotel inventory. The demand for hotel rooms downtown exists today; with the groups the joint sales teams are pursuing, it can be difficult for the teams to assemble a viable hotel block per the objectives of the event planner. This demand will continue to grow. Growth of significant, new, large conventions cannot be expected or anticipated without parallel growth in the hotel room availability.

Inventory Recommendation

At a minimum, a hotel inventory increase of a singular, full-service hotel with 500 hotel rooms within three walkable blocks of the RCC and a committable block of 60%-65% would be desirable at this time. At this level of commitment, the market would not be materially disrupted, and the room-night generation out of the RCC would keep the occupancy rate stable at the current level of 71%. In addition, if a future expansion is contemplated, an additional 500 rooms would be recommended to accommodate the RCC's larger footprint.

Sixty percent of the meeting planners surveyed believe that today's hotel package around the RCC is less appealing than other competitive markets.

In this process, JLL conducted extensive research, with one of those primary research components being a meeting planner survey (the results of which are included in the appendix). The survey results stressed the importance of the hotel package even further. Meeting planners want a sufficient hotel block to be walkable, with the desired headquarter hotel package being attached or adjacent to the center. 70% of the surveyed respondents stated that attached or adjacent hotels are "absolutely necessary" or "highly important." Furthermore, 60% of the surveyed respondents stated that today's hotel package around the RCC was "less appealing" than other competitive markets.

In addition, JLL spoke to the GRCVB's Customer Advisory Board (CAB) for Meeting Planners, which also provided feedback on the hotel package. The CAB members expressed the need for increased inventory with a variety in brand. The planners noted that diversity in brand offerings is important to their attendees.

This feedback further emphasizes the importance of a proactive, strategic hotel development strategy as a consideration for optimization and future expansion.

New Hotel Development

Downtown Raleigh's current and projected hotel inventory is constrained relative to the needs of the RCC and the Downtown Convention and Entertainment Campus. As discussed above, the county's ability to increase visitation through the Meetings and Convention channel will be challenging unless the hotel inventory in and adjacent to the Downtown Convention and Entertainment Campus increases. Because the RCC is owned and operated by the City of Raleigh, JLL worked with the City to discuss potential ways it could support hotel development. Discussions were based on JLL's Hotels and Hospitality Group expertise in public-private hotel development (collectively, the group has been involved in the majority of all the public-private hotel deals attached or adjacent to U.S. convention centers since 1999 and has helped municipalities across the country structure public-private hotel deals).

JLL recommends the City of Raleigh become the lead partner in this effort. JLL believes that the City must be involved to spur such needed hotel development and could do so within at least three options: supporting or providing parking capacity; land banking adjacent parcels; and/or developing an incentive package.

- **Parking capacity** - A pain point for many downtown hoteliers and stakeholders is the current limitation on parking on the Downtown Convention and Entertainment Campus. This pain point would increase with the optimization implementation efforts. Additionally, current city regulations require hotels to provide a certain ratio of parking spaces per rooms. The City of Raleigh could be involved in new hotel development by building or paying for the needed hotel garage/lot and alleviating that cost for a potential hotel developer. Additionally, the City may wish to construct a stand-alone parking garage to provide needed parking.
- **Land purchase or lease agreement** - Another area where the City could be involved is land banking of a potential downtown hotel site. The City could purchase available land as it comes on market or utilize land it currently owns and repurpose or position the parcel for hotel development. The City could structure a lease agreement with a hotel developer and operator that would be financially feasible for the developer and operator. All public-private approaches would have a "room block agreement" so that the hotel rooms needed for a priority RCC events could be secured.
- **Traditional incentive package** - A third option for City engagement would be to create a traditional incentive for development. In this case, the City could decide to be the developer and owner of a potential hotel; it is recommended that this be vetted further through the current policy set by the State of North Carolina. There are projects like this that have been very successful and, when done correctly, reap benefits for the municipality. Two highly successful examples of this include the Hilton Americas Houston and the Hilton Columbus. Both are owned by a quasi-governmental authority and were funded and built by public investment.

Suggested Steps to Launch a Public-Private Hotel Partnership

When discussing the potential for being involved in new downtown development, JLL recommended that the City of Raleigh consider taking the below short-term steps. This type of approach effectivity engages the hotel development industry, is transparent to stakeholders so that the projected positive impact of City participation in the deal can be documented and measured and produce the most innovative approach.

The effort to attract additional downtown hotels should be conducted concurrently with creating a master plan for the downtown convention and entertainment campus.

1. Develop a “Letter of Interest” request to invite qualified developers to engage in a process to determine the most effective approach to create a successful hotel process. A “Letter of Interest” is not the same as a “request for proposal,” as the intent of the letter is to gauge interest from developers in participating in a project in the near future with the City setting the criteria.
2. Determine the specific approach in developing a public-private partnership that is most advantageous to the City, County and key stakeholders.
3. Invite final qualified designated developers to participate in a competitive process to determine the final direction and the most appropriate private partner.
4. Negotiate a deal to develop a hotel to help support the existing RCC and the plan for renovation and expansion.

Downtown Convention and Entertainment Campus

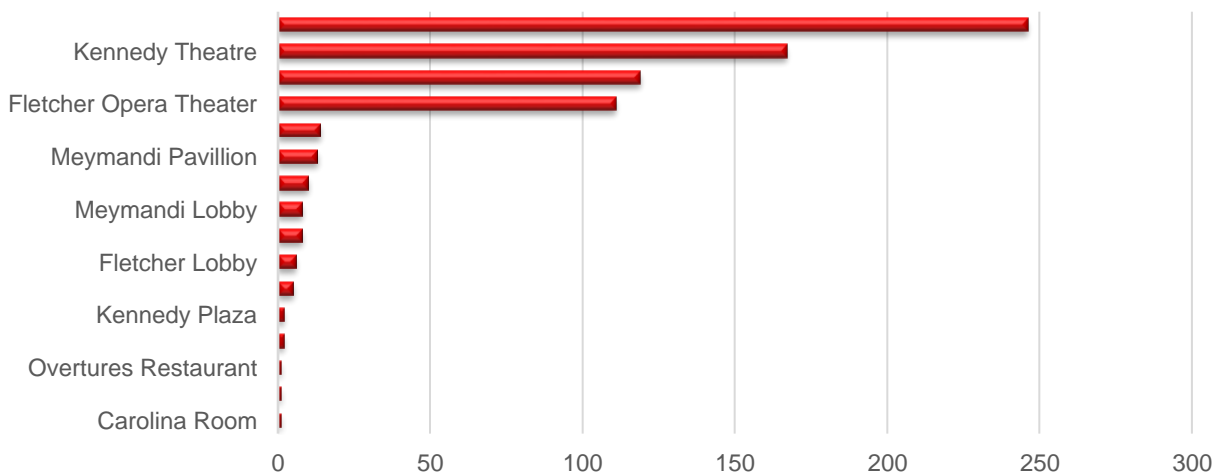
In addition to the RCC, a number of other assets and amenities anchor the downtown core, including the Red Hat Amphitheater (Red Hat), Duke Energy Center for the Performing Arts (DECPA) and the soon-to-be-redeveloped Dorothea Dix Park. These assets, mainly Red Hat Amphitheater and the Duke Energy Center for the Performing Arts, are two additional venues that serve local residents with performances and add to the convention campus. Unique to the venues, both Red Hat and the DECPA have different utilization levels and schedules. As public assets, the community wants to get the most value out of them, and the City wants to ensure it is delivering on that value, while maximizing revenue potentials.



Duke Energy Center for the Performing Arts

The DECPA is home to six companies including the North Carolina Opera, Carolina Ballet, Theatre Raleigh, N.C. Symphony, N.C. Theatre and PineCone. Across all companies, shows and ticketed performances, the DECPA hosted over 400,000 attendees during FY2017. DECPA is the venue for N.C. Theatre, and during the 2018-2019 season, the Theatre is slated to host *Mamma Mia!*, *The King and I*, *Murder for Two*, *Annie*, *In the Heights* and *Jersey Boys*.

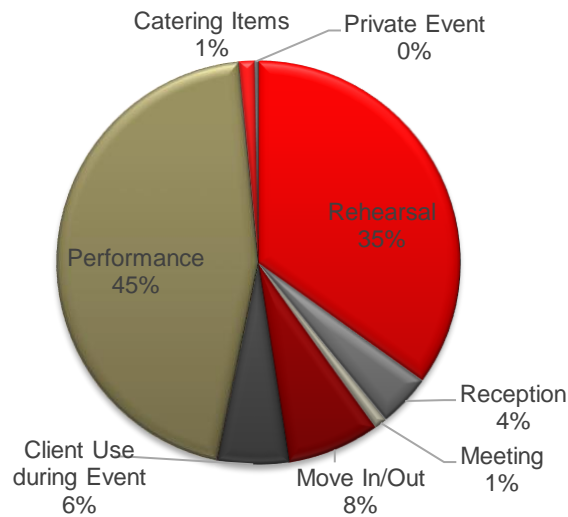
Usage by Space



Source: DECPA

In addition to the Broadway-level shows performed at the DECPA, the venue is bustling with activity with 298 active event days or 82% active occupancy. The venue hosts a total of 322 performances a year across all 16 leasable spaces. The chart below illustrates the number of times a space at the DECPA was utilized during FY2017, with Meymandi Concert Hall, Kennedy Theatre and Memorial Auditorium being the most booked spaces.

Usage by Type



Of the usage illustrated above, 80% of all the usage days were related to performances, with 45% of all usage attributed to shows and the remaining 35% attributed to rehearsals. The additional usage within the DECPA includes other client usage during events, moving-in and -out days, small meetings, receptions, private events and catered events. Combined, these usages make up 23% of DECPA’s activity as shown above.

DECPA and RCC

While DECPA is a vibrant and busy cultural arts and performance center, there is room for increased utilization of other spaces downtown. While this is done today, where possible, there is room in conjunction with the RCC and GRCVB convention sales efforts to bring additional events to the DECPA. As an anchor amenity in the downtown core, DECPA is a unique, nontraditional venue for offsite events.



Meeting planners have shown increased interest in planning everything from receptions and networking events to breakout sessions in unique and more intimate spaces. There is opportunity to grow the private event, catering and meeting usage of DECPA through a coordinated sales offering that rounds out the RCC as a campus environment.

In addition, the percentage of space that is used for rehearsal or “non-show days” should also be reviewed to determine future opportunities. This could include a first-class, offsite rehearsal location in the future.

Red Hat Amphitheater

Red Hat Amphitheater has become a highly successful outdoor performance venue within the county. Red Hat, as it is affectionately referred to, is situated adjacent to RCC on the land above the loading docks. Red Hat’s site was originally land banked for a potential convention center expansion and has worked well as a small venue for outdoor concerts.

Red Hat opened in 2010 and has had great success since its opening season. The venue has capacity for approximately 6,000 attendees and hosts roughly 30 shows per season (April-October).

Red Hat and RCC

Red Hat has become a fan- and local favorite over the past several years, and many see it as a major live music asset for the community. While it has played an integral role in adding vibrancy to Raleigh’s downtown core, Red Hat’s utilization was always an interim solution for the longer-term RCC expansion plan. With Dorothea Dix Park’s planning process now underway, there is potential for a similar size and scale venue to be an anchor site within that park. If the effort to develop a potential Red Hat 2.0 within Dorothea Dix Park comes to fruition, the time is right to relocate Red Hat and reconsider expansion of the RCC on this site. If that scenario is not deemed advantageous, a design should be contemplated that combines the entertainment use of Red Hat with the need of additional space at the RCC.

Convention Services

Convention services is a critical aspect of events at the RCC and within the downtown convention and entertainment campus. Assuming success of the RCC optimization and the strategic inclusion of Red Hat and DECPA in the downtown convention and entertainment campus, the impact on convention services needs to be considered. As the leader in service delivery, it is important for GRCVB's convention services managers to continue to work with their partners and vendors to help set the convention center experience apart. There is an opportunity to explore delivering destination management company (DMC) experiences that are currently not offered by the local private-sector and realizing effects of such delivery for clients, which could include revenue. Most importantly the convention services role should be in the following spaces:

- **Workforce development** – Workforce development is a foundational tourism component because of the need for qualified staff especially in front-of-house or customer-facing tourism and hospitality businesses. To cater to the meeting attendee and visitor, the assets and amenities of the county need to be staffed with trained workers, which can be a challenge when resources are scarce. There is potential to grow and revise the nascent countywide certification program. By increasing participation and updating the content as needed, the certification program will create a specific approach to training the tourism workforce and be a marketing tool to attract overnight visitors. The ultimate goal is to have an informed, well-trained workforce that can deliver a high level of service and support repeat visitation.
- **Partnerships to develop unique offsite venues countywide** – An added amenity for meeting planners are offsite venues where a group can have a reception or other event outside of a traditional meeting space. Unique spaces are attractive for offsite events and can include museums, outdoor facilities, sports facilities and others. Convention services could work with partners to help them curate and develop these unique spaces. In the future GRCVB's convention services team should be seen as a resource when applying for interlocal funds, as this capital could also be used to create needed offsite venues.
- **Accessibility** – With the potential for new developments onsite at the RCC and in the convention campus (including hotel development), accessibility is an important consideration. Ensuring that accessibility is a lead item in new projects and developments will continue to enable the services team to deliver to that community.

Convention Services, continued

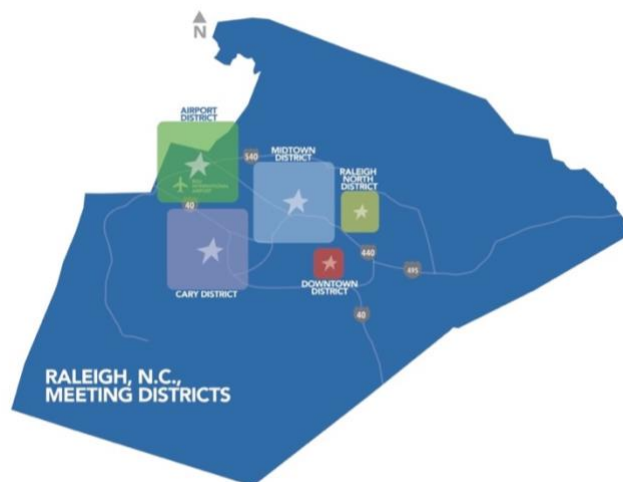
- **Transportation services** – Traditionally transportation services within a convention services role is about sourcing vendors and arranging these services for clients. The ability to deliver seamless transportation experiences is incredibly valuable to a meeting planner, though there are elements that are typically outside of anyone’s control (e.g., being in traffic or congestion). As the DSP process evolved, JLL learned of new transportation and traffic initiatives being advocated for by the Regional Transportation Alliance (RTA). These efforts to expand roadways and to add hardscaping and landscaping in highly trafficked areas will be a valuable addition to the transportation experience for convention attendees. It is recommended that convention services partner with the RTA on these initiatives while they are still in development to provide insight into what could be valuable from the meeting attendee’s perspective.

These are examples of where convention services play a key role in delivering a seamless experience for meeting attendees. Additional examples of how the services team at GRCVB could support the individual travel experiences are provided in the Individual Leisure priority section of this report.

Current Meeting Districts

Within Wake County there are five existing “meeting districts” that include clusters of full-service and upscale hotels where booking in-hotel group business for small meetings and conferences is viable.

Currently, each of the meeting districts enjoy a level of meeting and convention activity. To increase future meeting flow, JLL recommends that continued focus is contemplated through the recommended hotel development approach; analyzing new meeting space opportunities, as was noted with Cary, should continue going forward. JLL recommends that GRCVB strategize collaboratively with each district on growth in the future.



Wake County Meeting Districts

Airport District

The airport district is a cluster of mostly limited- and select-service properties. This cluster of hotels is closest to Raleigh-Durham International Airport (RDU), making it convenient for fly-in, fly-out meetings. There are three primary full-service hotels with over 2,500 square feet of meeting space in this district including the Courtyard by Marriott Raleigh-Durham Airport - Brier Creek, Four Points by Sheraton Raleigh Durham Airport and Embassy Suites Raleigh-Durham Airport/Brier Creek. These properties can host small corporate meetings and other events requiring group space.

With the continued growth in Wake County's economy and the proximity to Research Triangle Park (RTP), this meeting district is positioned well for in-hotel group business. Also, RDU's total passenger traffic has averaged a 6% growth year-over-year since 1985, with an increase of nearly two million passengers, or 20%, in the last 10 years. RDU's air service growth and steady rise in passenger traffic will continue to be a demand driver overall and will have a specific impact on this district.

In addition to being in close proximity to RDU and to Morrisville, these properties are also close to Brier Creek Commons, a retail and dining area within Raleigh. Having these amenities nearby for meeting and conference attendees will continue to make this district appealing. At the time of this report, there are also four hotels in the pipeline, adding 416 hotel rooms to that district. While these hotels are not planned to have significant meeting space, such a pipeline suggests the district is a vibrant location for small meetings and conferences. The ongoing growth in hotel inventory, coupled with continued development of supporting amenities will make the airport district more appealing for meetings in the future.

Cary District

The Cary District offers a different and varied experience for small meetings and conferences with charming boutiques and unique, luxurious offerings, including The Umstead Hotel and Spa and The Mayton Inn. Combined, these distinct properties offer over 2,500 square feet of meeting space. The Embassy Suites Raleigh-Durham/Research Triangle and Hilton Garden Inn Raleigh-Cary also offer significant meeting space in this district.

In addition to these hotel offerings, the Cary District is situated in the second-most populated municipality in Wake County and the third-most in the Research Triangle Region. Within this bustling community, the district offers meeting and conference attendees much to experience including shopping, extensive dining options and live entertainment at Koka Booth Amphitheatre. Cary is also known for its sports facilities and team centers including the USA Baseball National Training Complex and WakeMed Soccer Park (home to Cary's North Carolina Football Club and North Carolina Courage), where the U.S. National Men's and Women's soccer teams have played.

With all the activity in Cary and the momentum continuing to move development in Cary's downtown district, there is room for growth in this conference and meetings submarket. Throughout the course of the DSP planning process, it became clear that, for long-term meetings and convention success, GRCVB should continue to function as the singular sales and marketing organization for the county and continue to support the growth of Cary as a meetings location. This will be critical for the success of any further development both in the Cary Meeting District and Cary as a whole because of the wholistic approach that delivers concise and consistent messages into the meetings market. There are six hotel projects in the pipeline in Cary, delivering 689 new hotel rooms. GRCVB will play an important role in supporting group bookings into this district.

Cary District, continued

In addition, new venue opportunities are being explored in the county, which is described in the Destination Development section of this plan, that could have a positive impact on the future of Cary's meeting and convention business. The design of this type of facility must consider the potential to book future meetings and conventions in addition to the sports activity. The opportunity to create a larger meetings package in Cary is an important new demand generator in the DSP.

Downtown District

The Downtown District is led by the RCC as the premier and largest meeting and convention space in both the district and the county. As noted, the RCC is the largest countywide asset funded through interlocal funds (at \$221 million in building costs) and has delivered roughly \$659 million in direct spending into the local economy as of 2018, making it one of the most successful investments of interlocal funds. The RCC was analyzed in detail above.

In addition to the full-service hotel inventory included in the RCC analysis above (Sheraton Raleigh, Marriott Raleigh City Center and the Residence Inn Raleigh Downtown) in close proximity to the RCC, the Hampton Inn & Suites Raleigh Downtown/Glenwood South and Holiday Inn Raleigh Downtown also offer meeting space and additional guest rooms for in-hotel business in the district.

Midtown District

The Midtown District is also located in Raleigh and includes walkable shopping and dining areas—Crabtree Valley and North Hills. Within the Crabtree Valley section, there are four primary meeting hotels including the Raleigh Marriott Crabtree Valley, Embassy Suites by Hilton Raleigh Crabtree, Hilton Garden Inn Raleigh/Crabtree Valley, and Holiday Inn Crabtree Valley. These hotels combined offer over 40,000 square feet of meeting space with over 929 sleeping rooms. In addition to the existing properties, there are two main hotels in the pipeline, at the time of this report, that will add 250 rooms to the district, including a new full-service hotel.

Within the North Hills section of the Midtown District, which includes 130 retail, restaurant and bar options, there are two main meeting hotels in the Renaissance Raleigh North Hills and AC Hotel by Marriott Raleigh North Hills. Between the two hotels, there are over 330 hotels rooms and over 10,000 square feet of meeting space. The Hilton North Raleigh/Midtown, while not located inside North Hills, adjoins this complex, adding its 30,000 square feet of meeting space and 333 sleeping rooms into the mix for planners' consideration. In addition, there is at least one new hotel planned within the North Hills complex, as well as additional residential in the pipeline.

Both the Crabtree Valley and North Hills sections of the Midtown District offer a variety of amenities including extensive dining and retail options set inside walkable, mixed-use communities. These amenities make the Midtown District appealing for in-hotel meetings and conferences. The ongoing development and increased focus on entertainment in the retail areas will continue to enhance the attractiveness of the Midtown District.

Raleigh North District

The last of the existing meeting districts is Raleigh North, which includes one full-service hotels, the Holiday Inn Raleigh North-Midtown. There is over 3,296 square feet of meeting space with 130 sleeping rooms here.

The Raleigh North District is very close to the shopping and dining center of North Hills mentioned above for attendees to visit and experience. There are also a few dining options within this district for meeting attendees to experience offsite as well as a plethora of options if attendees venture further into North Raleigh.

Additional Meetings Hotels

West Raleigh is a developing meetings market with two main, full-service meetings hotels. These include the DoubleTree by Hilton Raleigh Brownstone-University and The Stateview Hotel, which is part of the Autograph Collection, on N.C. State's Centennial Campus. The Hyatt Place Raleigh West adds another 3,640 square feet of meeting space with 132 sleeping rooms as a small meetings option within West Raleigh. It is important to consider new hotel developments in markets like this to either include in existing meetings districts or to create new districts.

Takeaways

Meetings and conventions have proven to be a significant demand driver for Wake County and is a clear opportunity for continued ROI from a tourism tax dollar generation standpoint. There is great potential as a countywide tourism demand generator to grow this market's impact over the course of the DSP's implementation, including efforts to optimize and expand the RCC. The ongoing support and development of the district concept as popular meetings locations will also enhance the overall level of meetings and conventions activity for Wake County.

2. Sports

Priority Focus

Develop the needed inventory to include additional fields and courts, as well as an indoor multipurpose venue to elevate the county as a competitive sports tourism destination. Additionally, create an efficient and well-managed, countywide sports cluster model that utilizes the existing facilities and informs criteria for development and support of new venues.

Overarching Goal

Professional, competitive youth/amateur and recreational sports events and tournaments are a major opportunity for Wake County to deliver overnight visitation and significant economic impact into the community. The overarching goal for the Sports priority is to develop needed inventory (including additional fields and courts and an indoor multipurpose venue) to elevate the county as a competitive sports tourism destination. Concurrently the county should assemble an efficient and well-managed, countywide sports “complex” that utilizes the existing facilities as well as informs criteria for development to attract events and tournaments of the scale to drive overnight visitation.

GRSA: Sales and Sports Entity

The Greater Raleigh Sports Alliance (GRSA) is a department of GRCVB created in 1998 that focuses exclusively on selling the county as a sports destination and booking sports tournaments and events. The GRSA was formalized as a stand-alone entity in 2012 and is responsible for marketing Wake County as a sports event destination. This includes working with partners to book all the major sporting events in Wake County.

In addition to its full-time, five-member staff, GRSA has a 22-member Advisory Board, comprised of sports, government, tourism and hospitality officials who play key roles in the sporting events industry in Wake County.

Under the GRSA’s direction, Wake County has made such a name for itself that the National Association of Sports Commissions named it the 2015 Sports Tourism Organization of the Year. For the most part, the GRSA’s role is that of a liaison between an event rights-holder and a local host venue or organization. GRSA identifies and pursues events that are a good fit for Wake County. In parallel, GRSA works to identify a local host venue or sports organization that (a) is available to host the event and (b) wants to host and/or manage the event.

Once an event is booked in Wake County, GRSA typically plays more of a supporting role and often serves on local organizing committees. GRSA focuses on housing, marketing, community involvement and support, transportation, visitor information and visitor services. GRSA does not own, manage or operate sporting events or venues. GRSA works closely with local partners, who are the experts in the "event management" business.

Wake County has played host to many high profile events including: the NHL Stanley Cup Finals (twice), NHL All-Star Weekend, U.S. Youth Soccer Southern Regionals, NCAA Men’s and Women’s Basketball, USA Gymnastics Men’s Region 8, a Champions Tour (PGA) event, ACC Men’s and Women’s Soccer Championships, the visitRaleigh.com Showcase Series with NCFC Youth (formerly known as CASL), ACC Tennis Championships, NCAA Baseball Division II World Series, NCAA Women’s College Cup, U.S. Lacrosse Southeast Regional, the State Games of North Carolina and more. In addition, IRONMAN 70.3 Raleigh, drawing 2,500 participants from over 40 states, was in Raleigh from 2013-2018.

These high-profile events are samples of GRSA’s success, but are only part of the overall success of sports tourism in Wake County. GRSA has also been successful in securing high-impact, lower-profile youth and amateur sports tournaments and competitions throughout the county. GRSA has been involved in some advisory activities related to sports facility development; there are additional opportunities to play a broader role in advising on facility development and coordinating large tournaments within the existing facilities throughout the county. This has also been referenced in the Interlocal section of the plan.

Existing Sports Infrastructure

According to GRSA, the sports where Wake County is most competitive are many of the traditional sports including soccer, baseball/softball, basketball and tennis in terms of venue quality and quantity. As shown in the Situational Analysis map earlier in the report, Wake County has a series of existing facilities geared toward these sports. These facilities include:

PNC Arena	Southern Sand Volleyball Complex	Cary Tennis Park	Triangle Aquatic Center	USA Baseball National Training Complex
WakeMed Soccer Park & Cross Country Course	Ting Park	Walnut Creek Softball Complex	Millbrook Exchange Tennis Center	Carter-Finley Stadium (North Carolina State University)
WRAL Soccer Park	Five County Stadium	Thomas Brooks Park	Triangle Table Tennis	Capital City BMX
	Lonnie Poole Golf Course	RCC	Reynolds Coliseum	

Youth/Amateur Competitive Sports

Small complexes make up the majority of sports fields and courts inventory in Wake County. As detailed in the Situational Analysis section, there are nearly 70 soccer fields across the county with another 44 proposed. For each traditional sport, the DSP has outlined specific initiatives related to inventory, infrastructure or maintenance needs below.

Soccer

Wake County has a significant inventory of soccer fields, including several premier soccer venues. The primary need within the sport of soccer is additional turf fields. There is a slight concern within the sports community that, with the existing inventory, when combined with the nearly 50 additional fields planned in the pipeline, there could be a surplus for tournament use. The other important dimension for the future is the clustering of fields that are in close proximity. According to the industry experts in the market, including GRSA, synthetic turf inventory with lights and maintenance of the existing fields are needed to continue to be a premier destination for soccer tournaments. The DSP identifies what is required of future fields if Wake County is to continue to remain competitive as a soccer tournament location.

Sport	Inventory Needs	Infrastructure Needs	Maintenance Needs
Soccer	Turf fields	Parking Increased lighting	Grass field upkeep

Baseball/Softball

Wake County is also home to USA Baseball’s training facility and has become well-known for baseball tournaments related to the USA Baseball national governing body. This caliber asset in the county has worked to brand the area to baseball events. The primary need within this category is additional softball fields. According to the research done at the time of the Situational Analysis, there are no additional softball-specific fields planned for development, while there are 34 baseball fields planned. Building out the softball inventory (or fields that can be easily transformed for softball dimensions) should be part of future interlocal considerations.

Sport	Inventory Needs	Infrastructure Needs	Maintenance Needs
Baseball/Softball	Softball-sized fields	Increased lighting on softball fields	Facility upkeep

Basketball

Wake County has a strong reputation for basketball tournaments with the storied NCAA tournament runs of N.C. State, as well as hosting NCAA Basketball Tournament games at PNC Arena on a regular basis. In addition, GRSA has a strong relationship with the Deep South Classic occurring at the RCC each year. This event delivers 7,000 attendees and over 2,000 hotel rooms on peak night into the county. According to the industry experts in the market, including GRSA, indoor courts and a multipurpose indoor venue would be needed to take Wake County's basketball inventory to the next level. In addition, there is an additional indoor, multiuse facility contemplated in the county that could provide much needed inventory. This would enable GRSA and Wake County as a whole to continue to compete for high-value tournaments.

Sport	Inventory Needs	Infrastructure Needs	Maintenance Needs
Basketball	Wood courts 12-16 courts preferred with six-court minimum Small arena to seat 4,000-5,000 people		

Volleyball

Volleyball is one of the most desired sports for youth and amateur tournaments because of the size of tournaments and the impact they can have on a community. Wake County has also hosted significant tournaments including the City of Oaks Challenge. This event delivers roughly 4,000 attendees and nearly 2,000 hotel rooms on peak into the market. In addition, Wake County is also home to the Southern Sand Volleyball Complex, which is used for outdoor tournaments. If additional inventory of wooden, indoor courts is contemplated, these should be utilized for both basketball and volleyball. The same would be true for the desired indoor arena. This would enable GRSA and Wake County to continue to compete for high-value tournaments.

Sport	Inventory Needs	Infrastructure Needs	Maintenance Needs
Volleyball	Wood courts - eight-court minimum Small arena		

Tennis

With the significant inventory of tennis courts countywide, tennis is a sport where Wake County stands to compete well. As mentioned above, Wake County facilities have hosted successful USTA and ACC tennis tournaments in the past. The recently completed Cary Tennis Park is the premier facility in the state with the only covered courts (seven) in the region. Tennis is a sport growing in demand, and there is need for inventory with an increased focus on hosting tournaments. There is potential for an additional tennis center, which has been proposed. This would increase the number of available courts for tournament use and continue to increase the value to the destination's ability to compete for tennis tournaments. In addition, the courts could be used by tennis championship-level events at a small indoor arena.

Sport	Inventory Needs	Infrastructure Needs	Maintenance Needs
Tennis	Outdoor courts Indoor courts		

Sports Enhancements to RCC

The Meetings and Conventions section of the DSP outlines the needs of an RCC renovation and future expansion. As noted in the various optimization scenarios, there is an opportunity for the exhibit hall and proposed flex space to have more built-in and in-house capabilities to host indoor sports tournaments. To do so and to provide the ease of hosting an event demanded by the level of tournaments that would attract overnight visitation, more indoor courts (basketball and volleyball) and retractable seating would need to be purchased. The onsite equipment and furnishings would add to the RCC's overall capacity and aid in securing future indoor sporting events in the facility.

Emerging Sports Markets

Lacrosse

Lacrosse was identified early in the DSP process as a sport that is quickly on the rise in the region, as well as nationally. Many in the industry believe that participation in lacrosse is where soccer was about 10 years ago. Knowing how quickly soccer has taken off and how large the competitive youth tournament market is, Wake County could be poised to win much of the lacrosse tournaments in the region. Utilizing the soccer inventory, lacrosse should be a space where Wake County competes well going forward. The challenge with lacrosse on natural grass soccer fields is that lacrosse can be more destructive to the grass. Lacrosse cleats are similar to baseball cleats with a toe cleat, whereas in soccer a toe cleat is not allowed. With the added front cleat, the grass can be torn up at a quicker rate. This means that natural-grass lacrosse fields require added maintenance. This would also support the case for additional turf fields in the Wake County inventory.

Sport	Inventory Needs	Infrastructure Needs	Maintenance Needs
Lacrosse	Turf fields	Increased lighting	Additional field upkeep

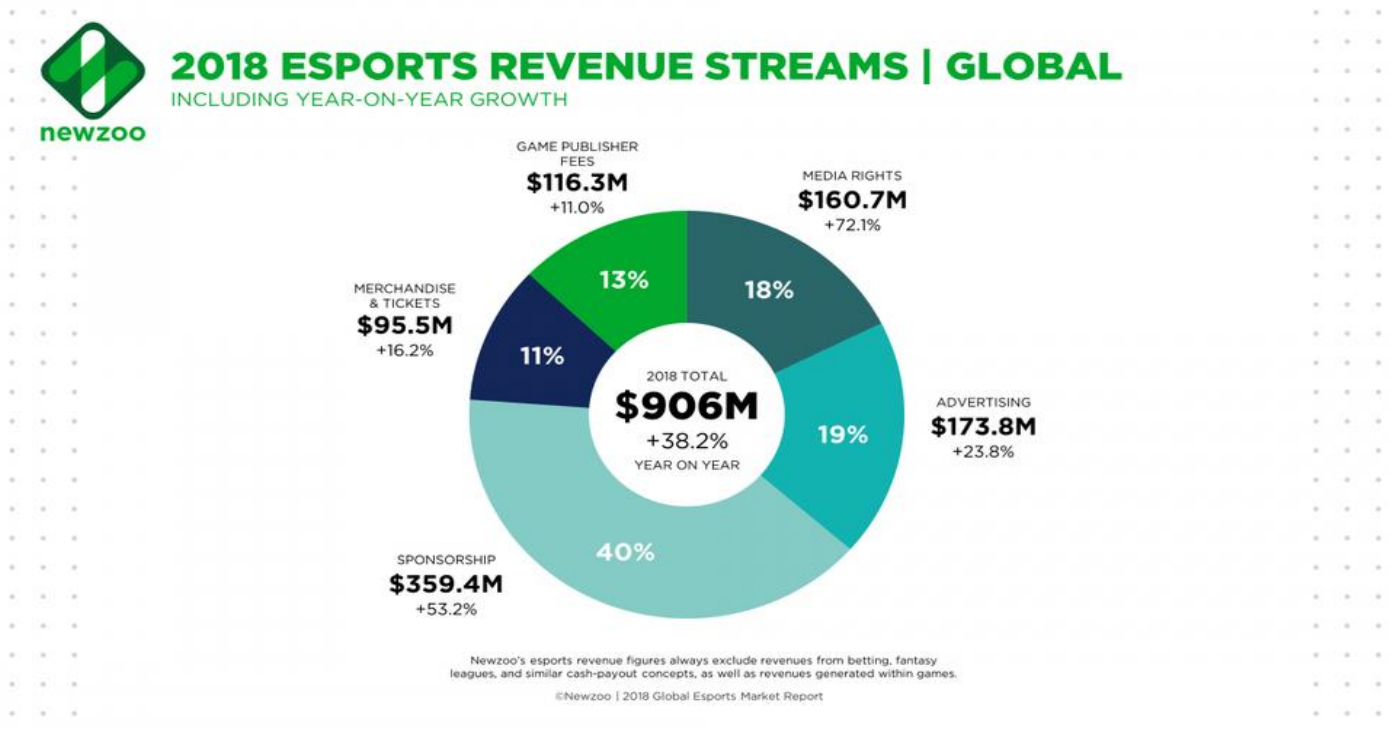
Esports

Competitive online gaming is one of the quickest growing sports in the country. In early 2018, Forbes stated the esports industry would soon be a billion-dollar market with revenues projected to reach \$906 million by year-end. In addition to the staggering growth in participation, brands are buying in at an increased rate, nearly 50% over their investment from the prior year, according to Newzoo, a market research firm with expertise on esports. The below breaks down where the revenue related to esports comes from, with the majority coming from sponsorships, but a significant increase is also seen in advertising. As brands and major advertisers begin to see increased value, esports will continue to grow.

Wake County has a highly valuable asset within the community when it comes to esports, with Epic Games headquartered in Cary and several other gaming companies in the region. Epic Games employs 700 people and operates seven subsidiaries across the globe. Epic Games is behind several gaming products, including Gears of War and the recent sensation, Fortnite.

JLL recently visited a sports training and competition center in Florida which includes mental training and dietary planning. This facility has also seen an increase in interest in esports and has had teams stay onsite to train for mental toughness, as well nutrition training to keep the gamers focused for long periods of time, increasing their performance.

Epic Games and other esports producers believe the next frontier for online gaming is now. Many are considering building production and competition facilities. With Epic Games headquartered within the county, this could be a viable opportunity to bring the next wave of sports tourism to Wake County.



Sport	Inventory Needs	Infrastructure Needs	Maintenance Needs
Esports	Production studio Competition arena	Secure server capacity	

Future of Professional Sports in Wake County

As mentioned above, Wake County is home to several professional teams and venues including the PNC Arena (Arena), where the Carolina Hurricanes play, and Wake Med Soccer Park, where the North Carolina Courage and North Carolina Football Club (NCFC) play. There are also several minor league or development leagues within the county. The professional leagues and their venues are important to the community as fans have come to love them.

Carolina Hurricanes and PNC Arena

PNC Arena opened in 1999 with the first hockey match of Carolina Hurricanes vs. the New Jersey Devils. The Carolina Hurricanes won the Stanley Cup in 2006, have been conference champions twice and won their division three times. The Hurricanes were recently purchased in December 2017 by Tom Dundon, at a 61% share of the team. This ensured the team would not be relocated and is a good sign for professional hockey in Wake County.

With the team's near future now secured, there have been discussions on the future of PNC Arena, given that it is approaching the 20-year mark. PNC Arena is owned by the Centennial Authority, which was created to manage the public-private partnership by the N.C. General Assembly. PNC Arena is also home to N.C. State's men's basketball team and has been host to a variety of other events including concerts and special events.

PNC Arena Utilization

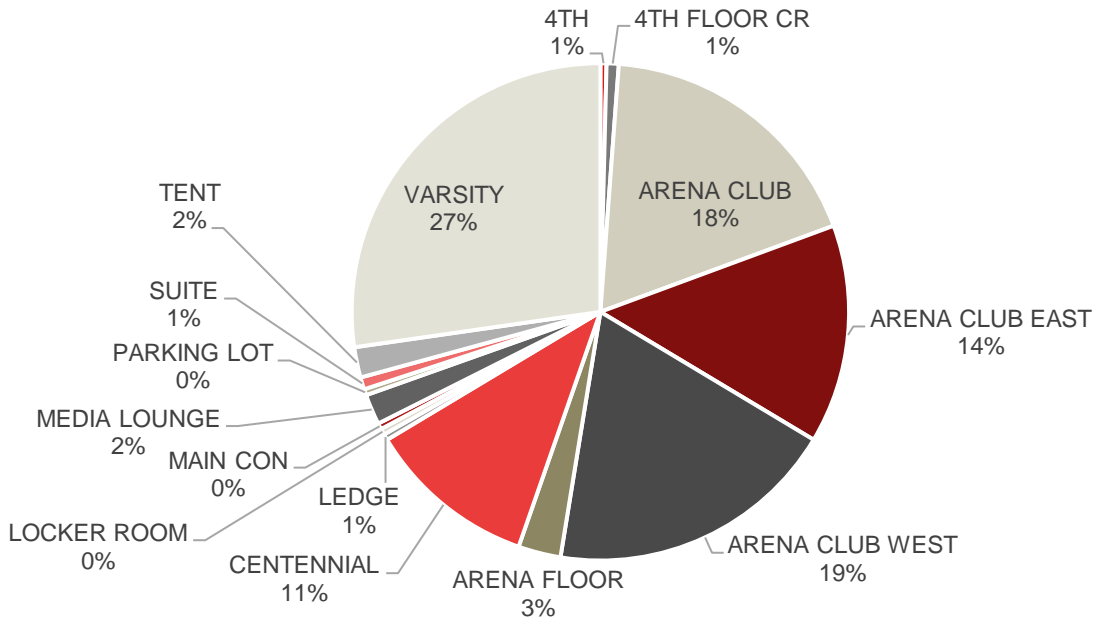
Like the RCC optimization process, JLL reviewed three fiscal years of calendar data to understand how PNC Arena is being utilized. The PNC Arena averages 135 full-building usages per year. These events include Carolina Hurricanes games, N.C. State basketball games and other concerts, comedy acts and special events. The full-building users represent 40% of PNC Arena's availability on average. The remaining inventory is used for smaller conferences, meetings or shows that do not occupy the entire building's leasable space. On average there are 266 additional smaller event days in PNC Arena each year for 120 groups. The below is a breakdown of how the building spaces are used by room when a full-building user is not in PNC Arena.

In total, PNC Arena had 269 total active calendar days in 2017, leaving just over 25% of the available days open. In discussions with the Centennial Authority, JLL believes there is room for opportunity to create further synergies with the RCC downtown and with GRCVB to pursue conventions with 5,000+ attendees that have a need for an arena. The most available time within PNC Arena is the summer months when the two primary tenants, N.C. State and the Hurricanes, are off season. In addition, there is opportunity to activate a portion of the parking areas for large outdoor events during this time.

With PNC Arena being as active as it is and a new owner of the Hurricanes in place, there have been discussions on the state of the building, its future and the future of the areas around it. As shown in the Situational Analysis map, there are areas around the PNC Arena that are under-utilized. State land at the

State Fairgrounds as well as the NC DOT and Department of Administration facilities could be redeveloped to create additional density in this area. There is more detail on this in the Destination Development section, but to keep PNC Arena a viable space for large events, the area around it needs to be developed to create a critical mass of experiences for both residents and visitors.

PNC Arena Usage (Non-full Building Users), 2017



In addition, there is currently a vision for the building itself to include enhancements for users and more activated spaces. The enhancements should consider opportunities to increase flexibility and potentially attract additional uses in the future.

Venue	Capital Needs	Infrastructure Needs	Maintenance Needs
PNC Arena	<ul style="list-style-type: none"> Open up main façade Create space for outdoor dining Increase flexibility to host multiple uses 	<ul style="list-style-type: none"> Network of development around the Arena to include restaurants and retail 	

Carolina Mudcats

The Carolina Mudcats are a minor-league class A Advanced Affiliate of the Milwaukee Brewers in the Carolina League. The Carolina Mudcats play at Five County Stadium in Zebulon. The Mudcats have previously been affiliated with the Atlanta Braves, Cleveland Indians and Toronto Blue Jays. The Carolina Mudcats have won five league titles and 10 division titles since 1988. Over 300 future major league players have played at Five County Stadium, welcoming over six million fans over the years.

North Carolina Football Club

The North Carolina Football Club (NCFC) is a professional soccer team located in Cary and is part of the United Soccer League. NCFC's home turf is Sahlen's Stadium at WakeMed Soccer Park. NCFC hosted its inaugural season in 2007, originally named the Carolina RailHawks. In 2016, the name was changed to NCFC. NCFC has become a strong brand for soccer in the area, as well as in the professional league, winning their division in 2010 and 2011 and finishing third in 2017.

Proposed Major League Soccer (MLS) Stadium

There is also an MLS stadium proposed in downtown Raleigh to become home of a new professional soccer team. This effort is being led by NCFC President Steve Malik. The MLS plans to get the total number of teams in the league to 28, currently at 25, with Cincinnati and Nashville being the most recent cities awarded teams. As noted above, youth soccer is in such high demand with the number of youth tournaments growing every year. The participation is reflective of the same momentum at the professional level, with soccer becoming America's third-favorite sport to watch, according to a Forbes article published in January 2018. While being third-favorite does not sound significant, the primary American sports (football, basketball and baseball) all had declining attendance figures.

With this in mind, the race to secure the last two team spots in the MLS is in full swing. The proposed stadium would be home to such a franchise if it were awarded to Raleigh and Wake County. The stadium could be a catalytic development for downtown, but the public-private deal could be challenging to accomplish, requiring certain buildings owned by the State of North Carolina to be all or partially relocated. If the stadium is built, the positive impact on the community could be significant, with roughly \$10 million in taxes collected by the City and County combined with an additional \$1.3 million in hotel occupancy taxes, according to the MLS stadium backers.

Importance of Utilization

While the proposed stadium's primary use is to house an MLS team, it is important for the facility to have other uses and continue to generate spending and return for the county. The MLS stadium backers have stated the importance of additional uses and believe they are critical to the success of the venue, anticipating 75 or more events annually. The DSP can support this initiative, especially the emphasis on flexibility and multiple uses. These uses could include:

- Championship-level sporting events outside of soccer
- Entertainment
- Small conferences or offsite meetings, general sessions and catered events
- Consumer or public shows (could move public shows out of RCC to this venue, which would free up space meant for conventions)
- Large-scale religious events

The plan includes a larger mixed-use complex including a conference center, 750,000 square feet of office space, 100,000 square feet of retail space, 1,200 residential units and at least 300 hotel rooms. While all of those uses have not been analyzed for feasibility by JLL, the most important component is the synergy between the existing assets and the ability for the proposed stadium complex to grow activity and not cannibalize activity already coming to the county.

Governance - Authority

As mentioned above in the discussion regarding PNC Arena, it is important to have a governance model that reflects the priorities and interests of the asset, City, County and State. To this end, JLL has spoken with the MLS stadium backers about the idea of an Authority similar to the Centennial Authority that owns PNC Arena. It is recommended that this option is further explored. Finding synergies and ways to position the assets both in the city and the county will be critical for success of a countywide model; more detail on this in the following pages. Regardless of the model chosen, GRCVB and GRSA will be critical components in this effort.

Countywide Sports Cluster Model

As noted throughout this priority, there are a significant number of fields and courts in the countywide inventory. In conversations with stakeholders, County officials and many city and town leaders, there were considerable discussions around the future model for sports sales, bookings and services. With sports being an important market for hotel room-night generation (representing just under 50% of all room-nights booked by GRCVB), the consideration for what to do next and how to do it are big questions for the DSP.

County leaders and stakeholders recognize that sports venues throughout the county's geography have been funded by the Interlocal Fund in the past and do not want to see those investments go to waste. Moreover, to remain competitive in the sports tourism and tournament world as other communities are building mega-complexes, fields and facilities must be maintained and improved over time. As an example, the competitor complexes being built sit on 100+ acres and can include as much as a third of Wake County's soccer inventory in one complex. Tournament organizers find those complexes appealing because of the ability to consolidate their usage to a singular location.

To remain competitive and maximize the investment made into the county's existing inventory, a Countywide Sports Cluster Model is recommended. The model would certify that entirety of the county's inventory that can be considered "tournament-ready."

To remain competitive and maximize the investment made in the county's existing inventory, JLL recommends creating a Countywide Sports Cluster model. In this model, the entirety of the county's inventory of fields and facilities that can be considered "tournament-ready" would be sold cohesively by GRSA. GRSA does much of this today; however, this model contemplates taking the GRSA's efforts and ramping them up further. This would be an important function, given the spread-out inventory (not every field in the county would be in the inventory since there is a threshold to be considered "tournament-ready"). JLL recommends this model be explored and developed in conjunction with the existing fields and courts owned by municipalities. The internal considerations and development for GRSA could be significant, including the need to add staff and additional resources. However, for the inventory that exists in the county to remain competitive, the experience provided by GRSA in this model could enhance Wake County's ability to compete.

This increased and focused effort by GRSA would include selling, booking and servicing tournaments within the county for fields and courts that fit the following criteria:

Sport	Minimum requirements	Notes
Soccer	Four (4) tournament sized fields	One lighted field for every four fields. Given the inventory of grass fields, turf is preferred to balance the inventory. Maintenance of existing and new fields to tournament-quality is required.
Tennis	Minimum eight (8) courts	
Lacrosse	Four (4) tournament sized fields	One lighted field for every four fields. Given the inventory of grass fields, turf is preferred to balance the inventory. Maintenance of existing and new fields to tournament-quality is required.
Volleyball	Eight (8) indoor courts	
Baseball/Softball	Four (4) fields	One lighted field for every four fields
Basketball	Six (6) indoor courts	

Criteria for unique specialty sports need to be built. Sports should be chosen given their ability to attract overnight visitors due to tournaments, e.g., cricket, pickleball.

In addition, GRSA’s efforts would need to be integrated with those of the facility ownership, whether that is a municipality or private owner. The GRSA and individual facility owners should enter into a memorandum of understanding (MOU), as noted in the Interlocal section, for tournament bookings and availability. GRSA should have the ability to also comment on maintenance and infrastructure needs to the ownership and to the County, especially if a facility was funded through the interlocal fund. As the entity responsible for generating sports tourism for the county, the GRSA should also be involved in calendar management and overall utilization, as many of these projects were funded with the idea of sports tourism at their core. There is additional detail on the role of the GRSA in the “Impact on GRCVB” section of this report.

Why a Countywide Sports Cluster Model?

As mentioned above, feedback from County leadership, elected officials and other stakeholders was clear that interest in hosting sporting events that attract overnight visitors is strong, but equally strong was to continue to drive the impact throughout the county, including the sports fields and courts that had already been invested in and developed. To have the desired impact, the model for sports tourism needs to be driven through a countywide mentality.

For the desired impact, the model for sports tourism needs to be driven through a countywide mentality.

This model would be unique to Wake County, as many municipalities are developing large-scale, singular facilities that have multiple sport fields and courts in one complex. As previously mentioned, those sportsplexes can be 100+ acres and consolidate all the sports inventory into one area.

In this process, JLL reviewed both main options: a countywide sports cluster and a singular sportsplex model. It was determined, in conjunction with GRCVB and County leadership, the model that would further the mission of the interlocal fund's past and future investments to deliver the highest impact is the countywide sports cluster model. County leadership supports this effort and wants to integrate this model into the way interlocal funds are committed in the future. Arguably, this model is more challenging than a single sportsplex model, but the goal of increasing overnight visitation countywide and ensuring the existing and future investments from the interlocal fund are realized can only be achieved through a countywide focus, hence the sports cluster model.

Proposed New Venues

Throughout this process, JLL has learned of several projects that could impact the total inventory of fields and courts across the county. Several of these projects have been well-thought-out and would be valuable to the community in terms of enhancing sporting events tourism in the market.

One of those proposed projects is the Knightdale Soccerplex. It is contemplated to have 10 soccer fields with additional family amenities surrounding the park, including food and beverage activation via food trucks and other events. The land was donated to the Town of Knightdale to make this project happen. In conjunction with this plan, land has also been allocated on an adjacent parcel for a future hotel plot. This is the kind of project that enhances the competitiveness of a countywide sports cluster model by adding the level and quality of fields, as well as planning for additional activation and future development around the site. At the time of publication of this report, Phase One of the Knightdale Soccerplex has been approved, which is five of the 10 planned soccer fields.

Another example of this kind of project is a 50-court complex proposed by Triangle Racquet Sports. The potential complex would be a host site for junior and adult USTA tournaments, as well as events on the American Tennis Professionals circuit. This would be the largest tennis facility in the region.

Similarly, early discussions are underway in other communities. Rolesville recently acquired 100+ acres and is interested in seeing that acreage utilized for sporting events tourism. Another large site in the county is available and could house a multipurpose indoor facility. Examples like these are projects that should be studied and vetted to align with the DSP's countywide sports cluster model.

Impact on Interlocal Fund

When it comes to sports fields, complexes, courts and other related sports assets applying for major project funding from the County, JLL recommends the following guidelines for new sports facilities:

- Funding request between \$5-10 million – a business plan be required with projections and measurement strategies for ROI.
- Funding requests between \$10-20 million – a business plan be required with projections and measurement strategies for ROI.
- Funding requests more than \$20 million - full feasibility from a nationally recognized firm should be a minimum qualification. In addition, the applicant should demonstrate the ability for the project to be activated for multiple uses.

In addition, tourism and the overnight visitor impact should be the primary focus of the project to receive such funds. For To be eligible for applying for funds, facilities should meet the minimum requirements described in the table on page 61. If a project is unique, in that there are no other facilities like it in the area, it should be considered because of the ability to attract those unique specialty sports, e.g., cricket, pickleball. The proposed project should show critical mass to generate the demand. The location of the proposed project is an important consideration, as larger tournaments will require multiple clusters of courts/fields. An example of a key opportunity is an indoor, multipurpose venue, which would include seating for 4,000-5,000 spectators and the ability to host indoor sports tournaments including wrestling, basketball, volleyball etc. A proposed indoor multipurpose arena of roughly 100,000-150,000 net square feet would satisfy part of the need for indoor sports facilities in the county.

Lastly, booking and calendar management are critical components of any new projects funded by the interlocal fund. The entity proposing field/court development should have a business plan (to include a minimum number of outside tournaments being brought to the area on a seasonal and annual basis) that has been vetted by GRSA. Any new fields/courts should be made available in conjunction with bidding on larger tournaments to create the largest inventory possible to attract and host tournaments generating the most hotel room-nights.

As noted, the ongoing quality of the fields/courts can be a critical factor in attracting tournaments. The proposer should submit and commit to a capital plan that ensures the level of quality required is maintained. The applicant should include ongoing preventive maintenance and capital planning in its submission.

If an applicant desires interlocal funds from tourism dollars to develop a sports-related project, such a project needs to be planned and built to scale to host outside tournaments and larger sporting events. Without a plan to develop such projects to-scale, Wake County will not receive the desired ROI, and these projects will

ultimately be more valuable to the communities they are in for recreational use. If a sports project is funded and is not measuring up to the standards that allowed it to receive funding, the County should reserve the right to include and activate “claw-back” statements in the agreements. This will enable the County to recoup funds invested into an applicant’s facility.

Sports Takeaways

The outlook for sports in Wake County is bright. It is important to stay focused on the overall facility development approach that will best position Wake County in the future. A countywide approach to developing the countywide sports cluster model will drive benefit throughout Wake County. To remain competitive as mega-sportsplexes are being developed will take coordination and leadership from GRSA. To balance the countywide clusters that are primarily outdoor fields, an indoor multipurpose sports venue as noted above would strengthen the county’s ability to compete for sports tourism. Sports for Wake County is a strong market with exciting long-term implications.

3. Events

Priority Focus

Adopt and implement an event management and creation process with set criteria to decide which events receive funding via public dollars.

Any comprehensive tourism plan should include a proactive strategy for leveraging and growing events that are of the scale or popularity level to drive overnight visitors. Destination marketing organizations (DMO) and event organizers understand the potential value of such events because of the economic impact they can have on a destination. When managed well, such a proactive event strategy can catapult a strong destination into being a more sought-after one and can be a critical component of increasing overnight visitation or expanding tourism opportunities in a softer demand period for businesses and industry stakeholders.

While events of the above scale can generate significant impact to a community, they are often seen as one-offs and/or are met with a sense of distrust from the community that does not see the direct ROI from public funding or support for large-scale events. In addition, events of such a scale can also be a pain point for locals who are impacted by traffic or congestion and inconvenience.

Overarching Goal

Wake County has the potential to leverage existing events of this scale and to consider creating signature events for the destination that would extend its brand. The overarching goal for the Events priority is to adopt and implement an event management and creation process with set criteria to decide which events receive funding via public dollars. Not only will this event management and creation process provide the county with a standard mechanism to measure the impact of events that draw overnight visitors, it will also provide a transparent platform that educates stakeholders and the public at large on the value and reasoning behind public funding and destination partner support of viable events that drive overnight visitation.

The event management and creation process would provide the county with a standard mechanism to measure the impact of events that draw overnight visitors and provide a transparent platform that educates stakeholders and the public at large on the value and reasoning behind public funding and destination partner support of viable events that drive overnight visitation.

Current Event Landscape

JLL's research indicates that there are currently a limited number of events held in Wake County, excluding sporting events and conventions, that have been a significant draw for overnight visitors. Current countywide events understood to be tourism demand drivers include IBMA's World of Bluegrass week, Brewgaloo, Freedom Balloon Fest, Hopscotch Music Festival and the North Carolina State Fair. These events have all been built to achieve a level of scale that impacts the community through money spent by overnight visitors and the ROI from increased tax collection. During JLL's interviews and focus groups, stakeholders were clear that outside of the above events and other sporting events, only a few existing events in the county have demonstrated the potential to draw overnight visitors.

Importance and Components of an Event Strategy

While event organizers and destination partners in Wake County have a long history of working together to produce and support events of various sizes (as the above list reflects), no formal event strategy exists to guide whether and how Wake County can support events with the potential to drive sizeable overnight visitation. To fully leverage the potential of such events, Wake County needs an outlined events strategy and countywide process to align stakeholders and organizers around a common set of overnight visitor generation goals. An inherent part of this process will be articulating criteria by which potential events can be judged and the outcomes against which the potential impact of the event can be measured.

Events should be evaluated based on an agreed upon matrix of relevant criteria that measure the economic impact of the event on the community. Below is a sample matrix that could serve as the baseline for ongoing event support in Wake County. In addition to guiding decisions on funding and support for the event, the matrix also communicates to event organizers the county’s criteria and priorities and allows them to structure their events accordingly. The matrix can also be applied to sporting event development.

Components	Fail	Poor	Average	Above Average	Excellent	Total Points Awarded
Point Allocation Maximum = 5 points per component*	1	2	3	4	5	
Program Components						
1. Tourism Promotion impact						0
2. Benefit to the Destination						0
3. Innovation						0
4. Evidence of Partnership						0
5. Organizational Structure & Management Capability						0
6. Economic Impact						0
7. Quality of Research						0
8. Suitable Target Market						0
9. Comprehensive Marketing Approach						0
10. Previous Replacement Funding						0
11. Evaluation/Measurement Plan						0
12. Room-nights* (10 points)						0
13. Scale of Project						0
14. Application Quality						0
Total Maximum possible points = 75						0

Definitions for the above criteria are included in Appendix A.

Signature Event

Beyond supporting existing events and growing them to a scale that drives overnight visitation, Wake County should consider creating signature events that will eventually both drive overnight stays and also extend the destination brand. The development of a signature event, or events that are centered on an authentic Wake County brand experience, requires investment, time for growth and additional resource support. However, once a signature event is groomed and catches on with the community, it can be an incredible tool beyond the economic impact it generates by communicating a destination’s values and/or personality and furthering a destination’s message.

Example of signature events include South by Southwest in Austin, Texas, Art Basel in Miami Beach, Fla., or WaterFire in Providence, R.I.; these events all have significant impact on the destination. They generate

ROI from spending in the local economy, deliver thousands of overnight visitors into the destination and create a stronger brand platform for the destination.

During focus groups and interviews, many stakeholders mentioned the same set of existing events with the potential to become Wake County’s signature event; however, there was no definitive consensus on the one or two events that currently accomplish the dual goal of generating substantial overnight visitation and extending the destination brand through an authentic Wake County experience.

Event Management Process and Funding

Whether leveraging existing events or creating signature ones, another key component of any event strategy is to bring together the appropriate and needed partners into a common event management process to nurture the growth of the event. Partners include the event organizer (potential fund recipient), as well as the funder (interlocal committee) and other destination partners. While the county’s interlocal committee ensures the recommended criteria are adopted and enforced, the event organizer and destination partners should work to educate stakeholders and the broader community on the benefit to the destination of hosting the event. This is accomplished via stakeholder education, as well as measuring and reporting the positive impact of the event on the destination. Lastly, a strong event management process appoints a single entity as the keeper of the community calendar.

Elements of an Event Management Process

- Funding
- Stakeholder Engagement
- Measurement and Reporting
- Calendar Coordination
- Site Coordination

Event Funding

Currently, Wake County does not maintain a funding source or line item to support events. Some of the municipalities within which the events are held often provide financial support or sponsorship. Because it takes time and initial funding support to nurture and grow an event to the scale at which it drives overnight visitation or evolves into a signature event that ultimately serves to brand the destination, successful event strategies contain an element of financial support from the destination. In building such a funding mechanism, decisions to help fund events should be based on strict criteria (as noted in the matrix above) that measure the event’s potential to generate substantial overnight visitation. Whether to support existing events that draw substantial overnight visitation or to augment efforts to launch a signature event, JLL recommends that the elected bodies in the county consider establishing such a funding mechanism using the current interlocal model.

By laying out criteria for receiving support and setting goals for overnight visitation, Wake County will have a transparent platform through which event organizers can apply for and potentially receive funds to support events that currently or in the future produce substantial overnight visitation. Since the current interlocal funding program is built on hotel occupancy and prepared food and beverage taxes (i.e., metrics that measure overnight visitor economic impact), the priorities for the events' funds disbursement model would align well with the existing interlocal funding program.

Stakeholder Education

Another key component of an event management process is educating stakeholders, potential applicants and the broader community that may be impacted about the process and criteria. The biggest challenge with such an education process is the initial change to the existing system of municipal and partners support for events. The County and the destination partners will need to work with event organizers to understand the criteria and how support for their event will be measured against them. The socializing of the new model could be shared through workshops held prior to the opening of the funding cycle and providing adequate time for questions and clarifications on submitting applications with these new criteria.

Additionally, the stakeholder education process provides a transparent mechanism to ensure the new criteria are understood and that applicants provide the metrics and event information required. Because the criteria used to evaluate potential support for an event are made public, the broader community can better understand how and to what extent the event delivers from an ROI perspective. This understanding will answer questions or concerns as to how and why funds are distributed to one event and not others. The process of deciding funding against set criteria ultimately removes politics and positions the process as objectively as possible.

Measurement and Reporting

Another critical component of an event management process is the ability to measure success and a standardized way to report results to stakeholders. Many event management processes lack this component entirely, or they miss an opportunity to report on key outcomes of the event to stakeholders that show the

Without a measurement and reporting function within the event management processes, the destination misses an opportunity to report on key outcomes of the event to stakeholders and show the ROI of supporting those events.

ROI of supporting events. The lack of communication can cause a lack of trust and uncertainty that the public funds are delivering the expected outcomes.

If the funding trigger for the event management process is placed within the interlocal structure, Wake County can require event fund recipients to report specific metrics. The standardized criteria for prioritizing funding, coupled with the standardized reporting process will ensure transparency in the event management process. GRCVB can support these efforts by helping to streamline the calculation of event impacts. As the official DMO

for the county, GRCVB has access to industry tools, i.e., an Event Impact Calculator, that can help measure

the impact of events. The Event Impact Calculator was developed for Destinations International, the industry association that represents hundreds of DMOs worldwide, including GRCVB. The Calculator has three modules: Meetings, Sports and Festivals and Cultural Events. When adopting an event management process, the County should require applicants to calculate all event projections and subsequent reporting in conjunction with GRCVB. This will standardize the reporting so that each applicant is using the same formulas and metrics when calculating the event's impact.

“The Event Impact Calculator has empowered destination organizations and CVBs to

quantify this value and, by extension, the case for the ongoing development of the meetings and events sector.”

- Don Welsh, President & CEO, Destinations International

The Event Impact Calculator is a highly valuable tool that produces output in terms of visitor spending and tax collection. The output should be reported out to stakeholders. Moreover, utilizing this tool through GRCVB ensures that all events are measured the same way. This prevents an organizer from including impacts that could be interpreted as being inflated or from failing to include impact that is customarily included in such calculations. Because the County does not have a uniform method to screen or double-check those projections, it must trust that the organizer has calculated the event's impact correctly. By utilizing GRCVB as a partner in event measurement and reporting, there will be standardization countywide and clear accountability for the impact calculations.

Calendar Coordination

Once the funding criteria are put into place, the next step to a successful event management process is promotion and marketing of the event. Much of this is the responsibility of the event organizer. However, the ability to share the breadth of visitor-facing activities occurring in a destination can be a strong selling point to travelers. All destinations struggle with the task of collecting information on the valuable events occurring and other programming within the community and sharing that information with visitors. Moreover, many destinations have three or more calendars, compiled by different entities that claim to be comprehensive, but that are merely duplicative efforts competing for air and facetime with potential visitors.

The ability to streamline the calendar coordination of the various events occurring in a destination is another element of a successful event management process. Given that no one comprehensive calendar exists for Wake County, there is an opportunity for GRCVB to be *the source* for all visitor-facing events in the county. Destination stakeholders understand the value in a singular source, and GRCVB staff recognizes value and is interested in serving this role. The ability to credibly produce a comprehensive inventory for visitor-facing events (or events with the potential to be so) across the county would add value to the visitor experience. It would also be a valuable service for the event organizers. The exposure received through being connected to the GRCVB platform would also add value to smaller venues and those with stretched marketing budgets.

In taking on this role of creating a comprehensive calendar platform, GRCVB should further explore and implement technology platforms and options that will enable staff to calendar events in the county (see page 139 for more detail). Despite advances in applications to automate such coordination, the most important part of any platform is the human resource that will need to be dedicated to this effort. Coordinating a comprehensive calendar will require human capital to continuously work with small- and large-event organizers to gather information and even input data into the system. The resulting platform will need to be integrated with the calendar functions of the 12 municipalities and have the ability to plug into other partners' websites and the option for visitors to sort events by type. Communication with independent organizers, as well as towns and venues hosting the events will be a critical component of a comprehensive calendar platform.

Creating a comprehensive calendar platform can be challenging and time-consuming, but its result is a valuable marketing and community building tool that is worth the effort. As this is a complex, multistep process, implementation may take three to five years to be fully maximized.

Site Coordination

In addition to creating and managing a comprehensive calendar platform, there is also a need for coordination among the various event partners in the lead-up to and execution of events. This is especially true in downtown Raleigh, where residents and business owners have expressed concerns related to traffic, congestion from closed streets and other impacts that may negatively affect business owners. With over 200 special events in downtown Raleigh annually, the City of Raleigh and the applicable destination partners will need to begin to be more selective about which events are granted permits. With the event matrix as a guide, the City of Raleigh and any municipality facing similar negative event impacts or resident concerns can better determine which events impact the community the most positively and select accordingly.

The City of Raleigh could and should be more proactive in its investments within the public realm. Many criticisms aimed at downtown events came from stakeholders who were concerned about the same streets being closed or blocked and events being held in the same areas that had been recently beautified or developed. It became evident that there are other areas of downtown or Raleigh's midtown where events could be placed; however, the surrounding area was not an ideal fit because of aesthetics. This could be due to vacant lots or lack of landscaping, etc. Where the City could add value is investing in short-term solutions to "clean up" and prepare sites to be better hosts. This may solve the problem of events effecting the same

areas consistently. The City of Raleigh, in conjunction with GRCVB and the Downtown Raleigh Alliance, should work to identify these sites and determine what investments are needed (be they landscaping and hardscaping or other beautification needs) to enhance the visitor and event attendee experience.

Lastly, the respective municipal and County event liaisons should meet on a regular basis to review the success and further development of the DSP event strategy. The group should establish goals for growing the type and number of events that will generate incremental overnight stays in Wake County.

Takeaways

Events are a critical component of a balanced tourism plan and the ability to develop an approach, including all municipalities and the County, to identify events with the highest ROI through the criteria included in the matrix will support events countywide in the future. This will support the goal to increase the number of events that generate overnight visitation. This will also include the development of new “signature” events over the next several years akin to the scale and brand recognition of South by Southwest in Austin or Firewater in Providence. These signature events will have a significant impact on both visitation and raising awareness of Wake County as a whole.

4. Key Attractors

Priority Focus

Utilize product enhancements to dramatically increase overnight visitor interest in Wake County's key attractors. Ensure Dorothea Dix Park's program includes overnight visitor-facing elements.

In developing the DSP, JLL analyzed key attractions to determine their current and future potential to attract visitors to Wake County. The close proximity of the North Carolina Museum of Natural Sciences and the North Carolina Museum of History to the state Capitol draws comparisons to the Smithsonian complex in Washington, D.C.. Marbles Kids Museum, a privately funded, interactive children's museum sits just two blocks away from these two state supported institutions. Across town, the sprawling campus of the North Carolina Museum of Art beckons guests with its impressive collection. The combined presence of these four museum assets evokes a referential and aspirational moniker for Raleigh as the "Smithsonian of the South".

Regardless of the comparison to the magnitude of the Smithsonian Institute's conglomeration of museums, JLL believes that Wake County benefits from the presence of these four museums. They are key attractors in Wake County's tourism destination product.

Additionally, the ongoing work to craft the future of Dorothea Dix Park by the City of Raleigh, the Dorothea Dix Park Conservancy and the park master planning consultants, Michael Van Valkenburgh Associates, warrants attention and consideration as the DSP is implemented. Dorothea Dix Park can be leveraged to increase overnight visitation and will most likely join the list of key attractors in the county.

Overarching Goal for Key Attractors

Key attractors in visitor destinations play a major role in boosting awareness and interest in the area. Outside of building in-state and regional drive markets, Wake County's key attractors are not yet playing a major role in truly driving new overnight visitation to the area. The one exception is when one of the museums hosts a large-scale, blockbuster exhibition. The Wake County key attractors currently do more to provide activities and rationale to extend stays in a similar manner to most destination attractions.

Within the priorities of the DSP, JLL recommends moving the four key attractors away from being a part of the visitor experience to consciously using them as catalysts for the visitor decision to travel to the region. With this catalytic mindset, the recommendations of this Key Attractors section are focused on a specific overarching goal:

Utilize product enhancements to dramatically increase overnight visitor interest in Wake County's key attractors.

In the context of the long-range nature of the DSP, the four museums and the proposed Dorothea Dix Park, in collaboration with the County, State of North Carolina and the destination partners should address how each site can grow demonstratively more compelling, how they collectively can achieve more through collaboration and how other opportunities can be fostered to add future key attractors to increase their ability to attract overnight visitors to Wake County. Coordinating efforts to strengthen the appeal of the four museums—collectively and individually—to overnight visitors and the creation of Dorothea Dix Park will be a key element of boosting Wake County’s appeal as a destination.

Museums as Key Attractors

The four museums have been categorized as key attractors for Wake County based on overall attendance levels, general awareness and applicability to attract leisure visitors. Three of the four museums are free to the public.

Of the top 10 most visited physical attractions in North Carolina, not including National Parks and the Biltmore Estate in Asheville, the key attractions above occupy four of the ten slots. The N.C. Museum of Natural Sciences is the most visited attraction in the state attracting nearly one million attendees in 2017. Marbles Kids Museum is the fifth-place attraction at nearly 700,000 attendees, followed by the N.C. Museum of History in sixth place with nearly 600,000 attendees. The North Carolina Museum of Art made the list in the ninth slot attracting nearly 500,000 attendees. No other county posted more than two attractions on this list, so the fact that Wake County based attractions appear four separate times bodes well for the tourism economy of the area.

The 2017 survey is the 14th annual ranking. Asheville’s Biltmore no longer reports attendance totals, and is not included.

The top 10, in order, are:

1. N.C. Museum of Natural Sciences, Raleigh, 946,486.
2. Fort Macon State Park, Atlantic Beach, 896,682.
3. Fort Fisher State Historic Site, Kure Beach, 871,676.
4. North Carolina Zoo, Asheboro, 860,148.
5. Discovery Place, Charlotte, 715,453.
6. Marbles Kids Museum, Raleigh, 690,629.
7. N.C. Museum of History, Raleigh, 579,236.
8. Museum of Life and Science, Durham, 574,884.
9. North Carolina Museum of Art, Raleigh, 495,696.
10. North Carolina Arboretum, Asheville, 494,532.

N.C. Museums and Historic Attractions survey, by Carolina Publishing and Associates

Visitation levels at these sites are anticipated to continue to grow, particularly as population across the state continues to increase. The ability of the four museums to substantially grow beyond current visitation and to increase their ability to drive overnight stays is a focus of the DSP.

This section does not seek to provide a marketing solution aimed at increasing awareness. Rather this initial phase should focus on enhancing the current experience and developing new experiences. Marketing strategies and investments should accompany a concentrated push to elevate the stature and iconic appeal

of each of these key attractors. The development of more iconic and singularly unique resources in each site will help Wake County as a whole, to increase its competitiveness and overall image as a great place to visit.

The recommendations around the four museums as key attractors can be categorized within four different themes that each play a role in helping the key attractors reach the overarching goal of increasing overnight visitor interest through product enhancements:

- Physical Development
- Blockbuster Exhibitions
- Experiential Programming
- Concentrated Collaboration

Physical Development

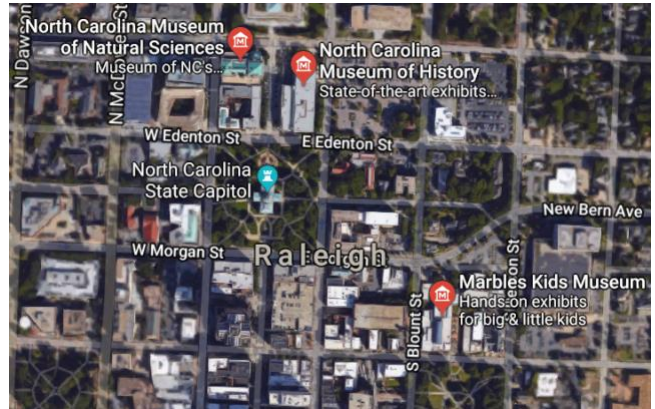
Each of the key attractors has its own development plan and creative concepts that change the physical look and appeal of their site. Each of these concepts carries the potential to increase interest in the Wake County destination product. The degree to which each enhancement produces this interest will depend on the magnitude of the development and the willingness and financial ability of the museum to truly embrace the notion of leaving an iconic mark on the community's architectural presence.

North Carolina Museum of Art

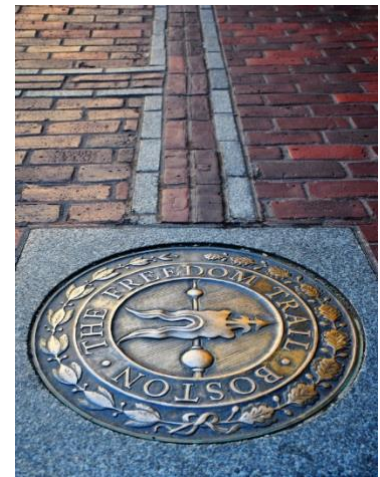
The North Carolina Museum of Art has been aggressively constructing a campus that is iconic, laden with public art, significant in its architecture and interactive in its programming. The greenway tie to the countywide trail system helps the museum to be a functional component of the area's quality of place. Future development should concentrate on connecting to other resources along Blue Ridge Road. The concentration of destination assets along the corridor provides promising transformational opportunities. As the Destination Development section of the DSP outlines, the Blue Ridge Road area can be transformed into a campus of science, medical, agricultural, sports, entertainment and artistic expression. The North Carolina Museum of Art can be a major leader of this effort through both its donor base and ties to the North Carolina state government. The acreage available to the museum allows it some flexibility to approach development with scale and use that the other attractors do not have. Planned development with additional iconic assets that more closely and visibly tie the NC Museum of Art to the traffic on Blue Ridge Road should be pursued. This development could bring new business to the corridor and also craft a new stream of revenue from tenants of the new space that would ultimately help support the future vitality of the museum.

Marbles Kids Museum

Marbles Kids Museum which target families and children has bold plans to more closely connect its future expansion with the City of Raleigh's \$12.6 million redevelopment of Moore Square. The addition of outdoor lawn space, a central water feature, café and significantly more indoor space creates opportunities for the museum. The museum's IMAX theater combined with exhibitions that encourage play-based learning sees its next canvas as bringing color and expression to the changing dynamics of Moore Square. This creative museum intends for the physical aspects of this expansion update to make the museum more inviting to its surroundings. Efforts to incorporate some type of iconic and playful new landmark with the expansion should be a priority over the next 10 years.



The distance between Marbles, the North Carolina Museum of Natural Sciences, the North Carolina Museum of History, the North Carolina Capitol, the North Carolina Executive Mansion is minimal and wayfinding signage currently points to each of the sites. As Marbles envisions its connection to the area immediately adjacent to it, the four museums should establish a visually stimulating linkage to connect the four sites to one another. The theme could be extended through downtown Raleigh to encourage the pedestrian experience. Boston's Freedom Trail provides a prolific example of a destination that has connected multiple sites through a dynamic visual connector. A simple line of bricks connects multiple sites along the Freedom Trail and creates curiosity for the next stop along the trail.



N.C. Museum of History

Nearby, the N.C. Museum of History has development plans to create its own connection to the pedestrian environment and stay connected to its historical mission. Currently, the exterior of the museum is non-descript with the aesthetic environs of a business office complex. Imagery, color and a look inside the museum would help create a stronger sense of attachment to the museum's expansive collection. The N.C. Museum of History should establish a physical streetscape icon before 2028. The visual topic of that icon should be compelling and significant and tie to an authentic experience or point of history in North Carolina.

N.C. Museum of Natural Sciences

The N.C. Museum of Natural Science is pursuing a truly iconic, one-of-a-kind addition to the museum that will build upon the now iconic Nature Research Center and elevate the museum's identity and appeal to the overnight visitor market. The museum is preparing for a full public release of this concept in the second half of 2018 following full budget and planning preparations. The size, magnitude and spectacle associated with this new exhibit is at a level that will be iconic for the region. The streetscape redevelopment will be heavily photographed and the theme will be popular with visitors of all ages. The new theme could even be incorporated into the pedestrian linkage with the other key attractors.

Blockbuster Exhibitions

The above physical development concepts provide permanent additions to the key attractors. Special temporary exhibitions also play an increasingly important role in Wake County's future ability to attract overnight visitors.

Over the course of this destination strategic planning process, Wake County hotel industry representatives consistently referenced blockbuster style exhibitions as demand generators for overnight visitation. These businesses recognized the significant boost in hotel room bookings generated from these exhibitions, usually hosted within the North Carolina Museum of Art. Specific shows around Monet, Rodin, Rembrandt and other art masters drove measurable overnight visitation to the area. Dramatic special exhibitions have routinely been pursued and embraced by the North Carolina Museum of Art, under the direction of Larry Wheeler, the museum's outgoing director.

The blockbuster exhibition hosted to date were expensive and the museums that have been undertaken have taken on the bulk of the financial risk in hosting them. For example, for each exhibition ultimately pursued, the North Carolina Museum of Art would construct the overall business approach and pursue partners. In some cases, the destination community at large was invited to participate with packages and themes, while in other cases the museum internalized the operation, only including a limited number of selectively chosen industry partners. Regardless of how the exhibition was orchestrated, the impacts were felt across the county.

Given the enormity of the task and risk of hosting such blockbuster exhibits, it is unrealistic to build a strategy around them without also identifying an entity to lead the pursuit of an exhibit and to coordinate activity to market the exhibit once it is landed. JLL recommends that GRCVB, in cooperation with hotel and venue partners and the host museum should develop a blockbuster exhibition market segment and develop sales and marketing strategies around them in a similar way to how meetings and conventions and sporting event prospects are pursued. Under this approach, touring blockbuster exhibits would be researched and then reviewed by a committee that would include the museums, GRCVB hotels and other interested parties. The committee would help to make a final decision on whether to pursue the event and invest the needed resources in the special exhibition.

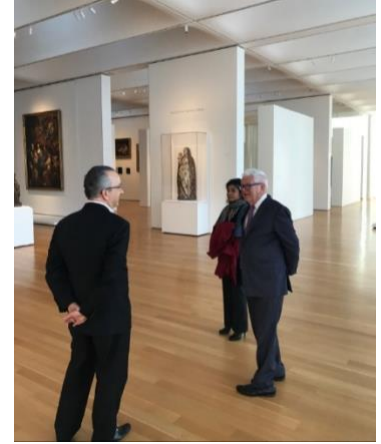
Blockbuster Exhibitions:
Traveling exhibits of national prominence that could encourage substantial overnight visitation

As illustrated in the table below, from a strategic perspective, blockbuster exhibitions act in a similar manner to a sporting event.

	Major Tournaments	Blockbuster Exhibitions
Investment	Bid fee	Exhibition fee
Market Segment	Youth, collegiate, by sport	Art, pop culture, sports, etc.
Sales strategy	Annual sales plan	Targeted hit list of desired exhibitions
Business development goals	Annual sales activity metrics leading to generated room nights	Annual sales activity metrics, services integration leading to generated room nights Initial goal of one blockbuster exhibition hosted per year but moving to two per year within 3 years of operations
Visitor services	Transportation, registration, room blocks, business coordination, signage, etc.	Packaging, business coordination, signage, sales, promotion
Pricing	Rebate built into room charge	Revolving fund built into package sales and tickets
Promotions	Tournament organizer developed with limited support from GRCVB and hospitality industry	Organized through a collaborative group of organizations led by GRCVB

By adopting a blockbuster exhibition market segment, GRCVB places an emphasis on creating a coordinated approach to pursuing these events. The effort would need a dedicated sales effort that could also be responsible for organizing the visitor services needed to fully immerse the theme of the blockbuster exhibition in the region’s hospitality industry and calendar of events. Moreover, GRCVB would be responsible for leading advocacy efforts to establish and administer an annually updated exhibition development fund. Such a fund could be built by applying a small ticket charge and a small room charge to the exhibit packages and recirculating these fees into the exhibition development fund for future use. Additionally, corporate and business community support should be pursued as part of the funding mix.

The planning and business development process would require a great amount of communication between GRCVB, the key attractor museums, and the hospitality community. These exhibition plans would be constructed every four years to create ready to use models for launching the community engagement portion of hosting these events. Themes factor in heavily to making blockbuster exhibitions a truly community event. For example, French impressionist exhibitions could prompt special menus, coordinated temporary exhibitions from corresponding pieces of the collection in other museums, special signage or apparel at key hospitality partners and tied in special offers at area retailers. Coordinating this needed community engagement would be part of the sales and services functions within GRCVB.



A balanced plan for pursuing blockbuster exhibitions is needed to avoid over-saturation of the market. Limiting the pursuit to one or at most three per year keeps the topic and interest high. Blockbuster exhibitions can be targeted for each of the key attractors, but the pursuit of the blockbuster exhibition plan should involve extensive design and participation by all four museums. This proactive pursuit of blockbuster exhibitions is only meant to supplement the current permanent exhibitions at each key attractor location. Additional and constant investment of resources should be applied to permanent exhibitions to make them as robust and interactive as possible to increase their appeal in driving the decision to visit Wake County.

Steps to Consider a Blockbuster Exhibition

- Review the relevancy of the exhibition targets
- Design a business model for each targeted exhibition
- Prepare a budget model for each targeted exhibition
- Construct a potential partner list and sponsorship platform for each targeted exhibition
- Design a likely marketing approach for each targeted exhibition
- Conceptualize the visitor services program for each targeted exhibition

Experiential Programming

Museums today must fully engage the senses of their patrons and visitors. Simply offering a visual exhibit with a description card might engage a visitor once, but they are not likely to make a return visit to such a static exhibit. Moving forward, in addition to their participation in the blockbuster exhibition market segment strategy, each key attractor should develop an experiential programming plan (EPP). The EPP plan assesses each portion of the museum collection to determine how the exhibits can be more hands-on, sensual and engaging with guests of all ages, backgrounds and abilities. This knowledge can help in the development of capital



improvement plans, special sponsorship development and overall curatorial redesign. The EPP can be a decision-making tool for the museum leadership, especially for the interpretive programming team.

The EPP can be helpful to each of the Key Attractors, but the North Carolina Museum of History can readily relate to how influential an effective EPP can be. The museum's recent World War I special exhibit utilized an EPP process to design, curate and install the exhibit and guest interaction was clearly evident. An effective EPP implementation will draw new interest and provide a heightened level of engagement for the visitor.

Collaboration

Theming and collaborative programming is a component of the blockbuster exhibition plan as each museum can program around the high-profile event coming into the marketplace. Similar strategies can be used with the on-going operations to bolster awareness and connectivity through shared investments.

Wake County is very fortunate to have four museums of such caliber operating within its boundaries. This critical mass provides a tremendous amount of opportunity for the area, but it does have one down-side. These sites often find themselves theoretically competing with one another for limited resources. The three state supported sites share one primary financial benefactor in their recurring line item in the North Carolina state budget. As a private entity, Marbles depends on a targeted membership and private donor approach for funding support.

The museums are collaboratively minded despite the pursuit of similar funding sources. However more concentrated and applied strategic cooperation would benefit each museum. Coordinated themes, programming, promotions and even sponsorship development could be instrumental in bolstering success. Building a combined business plan with shared resources and responsibilities could provide a level of community engagement that sparks interest and future support.

Additionally, special bundled tickets should be designed and offered in a similar format to *City Pass*. The number of no-cost museums in Wake County limits a bundled ticket provider from realizing financial success from a multi-ticket, but the key attractors working together could create their own version. This combined ticket concept would not be focused on the business revenue needs that would be required from a for profit ticketing purveyor. Rather, the cross promotional platform would ensure that visitors to one museum are openly invited to continue their journey to the other museums. This ticketing strategy is based on fulfillment through communication. Support from the hospitality industry could be targeted for distribution and promotion.

Dorothea Dix Park

The development of Dorothea Dix Park provides a new opportunity to create the region’s fifth key attractor. During the DSP process, JLL met with the landscape architecture firm leading the creation of a master plan for the park, Michael Van Valkenburgh and Associates (MVVA). Specific visitor oriented recommendations were discussed for the park’s development and are contained within the initial planning concepts developed by MVVA.



The vision to create the next landmark urban park in the United States of America is an incredible opportunity. The park campus, at 308 acres, requires significant transformation to the site, purpose and concept from its present utilization. The conceptual development phase for Dorothea Dix Park has focused most heavily on creating a cultural asset that will have a profound positive impact for the region—a park for everyone, built by everyone—with a goal of being transformative in terms of both quality of life and economic drivers. There has also been a focus on connectivity, reconfiguring the current buildings for either repurposed use or demolition and development of a sustainable model for providing on-going revenue to cover park maintenance and upkeep needs.

Throughout the DSP planning process, the topic of Dorothea Dix Park produced an undercurrent of skepticism—largely around the level of funding needed for successful development of the park. The stakeholders were excited about the promise and potential, but they expressed concern for the magnitude of investment needed to fulfill the park’s ambitious vision. Additionally, some stakeholders worried the park concepts would become watered-down to help lower development costs. Respondents were hopeful that the plans for the park to be bold, iconic and engaging would remain, but many were pessimistic that the overall vision for the park could be achieved given resource concerns.

Funding concerns notwithstanding, development of the Dorothea Dix Park as a vibrant destination urban park is a key component of the DSP’s Key Attractor strategy and could play a pivotal role in making Wake County a more competitive destination. As stated earlier, the goal for Dorothea Dix Park is for it to be an attraction that causes visitors to come to Wake County.

In developing a truly vibrant destination urban park, there are a few considerations that could be added to the master plan development decision making process. Each of these concepts are proposed to heighten the ability of Dorothea Dix Park to attract interest by overnight visitors, the goal of a key attractor. Development of the park as a destination is not mutually exclusive of ensuring the park meets the expectations and needs of the area’s residents. The concepts are:

- **Develop an iconic feature as part of the site’s master plan:** Central Park was referenced for the planning concepts, but Chicago’s Millennium Park provides several iconic level concepts that drive interest in Chicago as a visitor destination. The Quality of Place section of the DSP spells out an overall iconic approach for Wake County.
- **Balance recreational pursuits, activatable event areas and passive park settings to encourage visitor use:** Central Park consists of programmable event space, ice skating, boating, a zoo, trails and gathering areas. The diversity of activities defines the park.
- **Petition North Carolina State legislature to reinvest the property purchase price into the facilities and amenities of the park:** The park is going to require substantial long-term investment and development. Park settings and amenities that are attractive to visitors will be highly sought after by local

Visitor-facing concepts for Dorothea Dix Park, continued

residents. The reinvestment would be catalytic and help challenge local philanthropists, municipalities and corporations to match the state's reinvestment.

- **Embrace short-term (early impact) projects, concurrent with the long-term pursuit of something truly great/iconic.:** The development of Dorothea Dix Park is going to extend well beyond the timeframe of this 10-year Destination Strategic Plan. The community has expressed its desire to build an urban park on the magnitude of internationally known landmark parks, but the examples were not created overnight. They tried concepts, evolved, redeveloped and invested over time to get to where they are today. Developing Dorothea Dix Park is a long-range objective that requires patience and perseverance. Great ideas will likely be crafted during the park design phase. These great ideas may require years of resource building to accumulate the investments needed for construction and operation. Small steps and improvements can supplement these larger concepts and allow the park to be a community asset over the short-term. Development of this park must adhere to a long-range schedule built on the ebb and flow of progress. This park will not be redeveloped overnight.

The City of Raleigh's vision to pursue the opportunity to remake the Dorothea Dix complex into a destination park is commendable. Park development opportunities of this magnitude are extremely rare. Community and state leaders need to be bold in pressing the masterplan to adopt a destination development perspective. Community and state leaders will also need to support such.

Key Attractor Takeaways

The four existing and one planned key attractors in Wake County have a promising future for visitation growth. In fulfilling this promise, each of these attractors needs to consider how it can address driving more interest from overnight travelers. JLL meet with the leadership of the four museums and the consulting team currently assisting the Dorothea Dix Park Conservancy. The leadership of the four museums and the Conservancy expressed interest in beginning dialogue to identify ways to act on these recommendations. In completing the implementation plan for this strategy, thoughtful dialogue should begin to identify program coordination and a proactive approach for hosting blockbuster exhibitions. A long-range goal would be to establish two new key attractors over the next 10 years

5. Individual Leisure

Priority Focus

Continue to create, curate and develop unique, experiences to drive overnight stays.

Individual leisure travel is defined as vacation travelers who are coming to Wake County for a tourism asset/experience. According to the U.S. Travel Association three out of four domestic trips taken are for leisure purposes, and the top leisure travel activities for U.S. domestic travelers include visiting relatives, shopping, visiting friends, fine dining and rural sightseeing, respectively. Leisure tourists are the singular most difficult visitor group to influence, convert and ultimately track.

Overarching Goal

One of the desired outcomes and goals of the DSP effort is to increase total visitation to the county to 21.7 million total visitors by 2028. A portion of those visitors will come from individual leisure travel. The Priority Area around Individual Leisure travel will include those key attractors detailed in the previous section, as well as leverage other unique experiences in Wake County that have the potential of becoming demand generators. The overarching goal of the Individual Leisure initiative is to continue to create, curate and develop unique, experiences to drive overnight stays. This could also include efforts to combine multiple tourism assets, which individually may not be substantial demand generators, but that collectively create an experience that can attract overnight visitors to Wake County.



In addition to the goal of creating unique experiences for new leisure travelers, JLL recommends that work in this priority should aspire to track conversion of potential visitors to actual overnight visitors. As mentioned above, this segment is the most difficult to track industry-wide. However, there are new technology tools in the market that make it more achievable to understand the correlation between a marketing effort on behalf of a DMO and the actual conversion of that touch point or impression into an overnight visit into the market. Tracking the conversion of those exploring the possibility and attractiveness of a visit to Wake County and an actual visit to Wake County will help demonstrate success, understand challenges in attracting the leisure visitor, and inform GRCVB's and other destination partners' marketing decisions.

Existing Visitor Markets

GRCVB has invested in detailed visitor research to better understand the current visitor markets coming to Raleigh and Wake County. This research helps drive strategy to reach more of those visitors, increase their length of stay and spend while they are here, and hopefully cause repeat visits. GRCVB has conducted research to shed light on who the County's visitors are today, why they are coming, and what they do when they are here. The study breaks out day trip visitors from overnight visitors. For the purposes of the 10-year DSP, the priorities are focused on the overnight visitor. Ultimately aspects of an overnight visitation strategy will benefit a day trip visitor. The below is a snapshot of the overnight visitor to Wake County's profile based on on-going research.

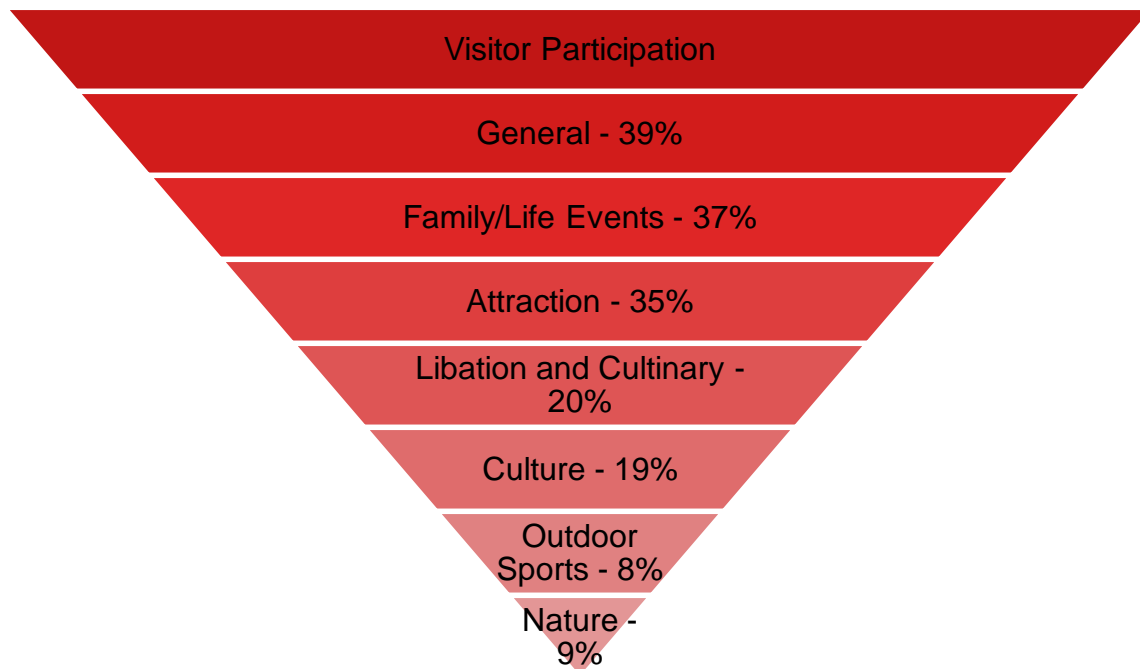
Based on the research, GRCVB should work closely with its partners to develop and curate experiences of interest to these visitors. JLL's research and experience shows that today's leisure travelers are more interested in unique experiences during their vacations than previous generations of travelers. While the term Experience Economy was first coined in 1998 by the Harvard Business Review, companies, retailers and other service and commodity providers have been slow to sell the experience. Traveler demand are driving this shift in visit preference with the experience leading the way and causing destinations to act more quickly to meet these demands.

The below graphic is an excerpt of what activities the Wake County overnight visitor participates in while they are here. This information will be helpful in further developing experiences to package and promote. The below excerpt shows that overnight visitors most often participate in general activities, family-life events, attractions, libation and culinary activities while they are in Wake County. Within those groups shopping, visiting friends and relatives and culinary/dining experiences are the top activities visitors participate in. Utilizing this information, GRCVB can more directly create and promote experiences to drive new visitors, extend a visitor's length of stay and/or create repeat visitors for the destination.

Wake County Overnight Visitor Profile

- **Age:** Middle aged and older travellers; Boomers, Millennials and GenXer generations
- **Income:** \$95K on average; grew due to higher share of >\$150K+
- **Life stages:** Youngest and oldest travel parties without children in household
- **Marital Status:** increasing share of married travellers
- **Purpose of Stay:** Visit Friends/Relatives, Group Business, esp. Seminar/Training, followed by Special Events and Transient Business
- **Activity:** only 2 in 3 travel parties participate in any activity during their stay in Raleigh
 - Most Visit Friends & Relatives, participate in a Culinary/Dining Experience, go Shopping or Business/Work
 - Raleigh's travel parties participate more in Business/Work and Movies than at other US destinations
- **Length of Stay:** 2.37 nights on average (slightly shorter than travelers to the US average destination but longer than competition); recovered after three years of decline

Visitor Participation by Activity Type



Source: GRCVB

The trend and emphasis on experiences presents an opportunity for DMOs like GRCVB to get involved at a deeper level. As the entity that knows all the aspects of Wake County as a destination, GRCVB is in a unique position to do so. The research tells us that the Wake County visitor participates in specific activities. It also sheds light on where GRCVB and Wake County's communities have a major opportunity to differentiate the destination is in creating and cultivating unique, ground-up experiences. GRCVB has laid the foundation for this in the Makers Movement, Passionate Minds and other grassroots initiatives to elevate what is unique to Wake County's community fabric. However, the DSP's Individual Leisure priority challenges the tourism and hospitality community in Wake County to take those initiatives further and for GRCVB to take a lead role in execution.

Individual Leisure Experiences

People-First Tourism (People-First or P1t)

During this process, JLL learned of People-First, a program started by a group of N.C. State professors with the intent to share authentic, hyper-local experiences with visitors. People First Tourism sets a model that the county could adopt in building authentic visitor experiences that are customized to traveler preferences and that allow for a scale that would have measurable impact on Wake County's overnight visitation.

With this type of thought leadership in its backyard, GRCVB, Wake County tourism and hospitality stakeholders and the broader community should invest monetarily and with human capital to curate these types experiences.

People-First's manifesto is lead with "We seek a world where travelers develop deep connections with their hosts, are transformed by the genuine local cultures they experience, and improve the lives of the people they visit." What People-First intends to do is surface those unique people and experiences in communities to draw visitors to travel for such experiences.

"Communities are complex with constantly evolving factions that use their various capitals to compete, complement, and collaborate with each other" the People-First Manifesto states. With this type of thought leadership in its backyard, GRCVB, Wake County tourism and hospitality stakeholders and the broader community should invest monetarily and with human capital to curate these types experiences.

Today, the People-First movement is limited in its inventory of experiences in Wake County. JLL asked different stakeholder groups who their "people" might be in this movement. When stakeholders were prompted to look inward at their community members, they were amazed to find the host characters, entrepreneurs and business people in Wake County that they could offer. These unique makers, restaurateurs, farmers, chefs, growers and creators can offer an experience no one else can, and these types of experiences unique to the people of Wake County will grow the interest in the destination from a leisure perspective.

Based on insights from the visitor research, JLL recommends GRCVB take a lead role in developing, curating and promoting People-First experiences to the visitor market, in conjunction with People-First and others developing authentic experiences in the market. GRCVB and those partners should develop, curate and promote new experiences in the following categories:

*P1*tourism



- Restaurant/culinary
- Retail/shopping
- Makers, crafters and creators
- On farm
- Music and cultural
- Brewing or distilling
- Entrepreneurial

Inspiration for these experiences should come from foundational work GRCVB has already done to elevate creative and innovative personalities across the county, i.e. Passionate Minds. The Passionate Minds are a collection of individuals who represent Wake County's dynamic and creative fabric. They are innovators in music, culture, food and beverage and more. Drawing on the Passionate Minds, Wake County can use this platform and connect to an established inventory of unique characters, places and people.

As mentioned above, the current People-First inventory in Wake County is limited. For the program to be successful, it must have consistency in its offerings and enough critical mass to offer a viable selection of visitor offerings. To this end, JLL recommends GRCVB work with the People-First program directors to scale the offerings up to over 500 new experiences in the next 10 years. That is equivalent to over 50 experiences added per year.

Another critical element of success is the need for a high degree of collaboration and participation across the county between multiple groups including municipalities, chambers, local passionate minds and others to surface and develop these kinds of experiences. JLL recommends that the collaboration include other companies or programs that offer like experiences to grow the total inventory, many of which GRCVB already works. This includes Taste Carolina Gourmet Food Tours, Beltline Brew Tours and Tobacco Road Tours.

Additional Individual Leisure Experiences

In addition to the potential visitor experiences that People-First provides, there are many other unique ways for visitors to experience Wake County. The two strongest areas for these experiences are in culinary and retail.

Culinary

Building on the information gleaned from visitor research, there are real opportunities—especially in downtown Raleigh—to build on the vibrant and diverse culinary scene. With the combination of local and celebrity level talent that exists in the community, Raleigh and Wake County have much to offer in the culinary and dining space. Wake County is home to several James Beard Award nominees and even a winner. This level of talent should be showcased as a legitimate visitor experience.

Examples of Wake County's Culinary Strengths



The diversity of offerings, level of passion and commitment to community in Wake County's culinary community is something rarely grown organically. To take one example, the establishments within Raleigh's downtown exemplify these qualities unlike most downtowns across the country. What has developed in Raleigh's downtown food and beverage scene is an outgrowth of the broader community and what the DSP is calling Quality of Place (more on that in a section to follow).

What Wake County has to offer in terms of food and bar scene is both tasty and experiential. With those two qualities checked off and the added layer of notoriety from the chefs and makers, Wake County has what it takes to elevate its food scene and become a destination.

Shopping & Retail

JLL's visitor research suggests that shopping and retail experiences are one of the main reasons people visit Wake County. The existing retail experiences that have the potential to and do help to attract overnight visitors include the expansive North Hills mixed use development in Raleigh's Midtown, local retailers in downtown Raleigh, Cameron Village, Crabtree Valley Mall, Triangle Town Center and local retail offerings in downtown Wake Forest and Apex.

The county's retail strength is further enhanced by GRCVB's collection of Passionate Minds which includes the retailers of Stitch (Holly Aiken), DECO Raleigh (Pam Blondin) and Moon and Lola (Kelly Shatat). These local makers have created a vibrant, locally driven shopping experience throughout the county.

The expansive opportunities for retail experiences in North Hills and other shopping centers offer access to name brands and everything from home design to clothing. The retail experience of North Hills is a premier example of the way retail complexes have had to change—for the better. The planned development including mixed-use retail, residential and culinary has created a destination.

The Individual Leisure priority of the DSP recommends a focus on enhanced retail experiences. These offerings continue to create the critical mass needed for a leisure traveler to plan a vacation around. Retail alone will potentially drive new overnight stays in the market as the offerings continue to grow and diversify.

Existing Leisure Demand Generators

The Key Attractors priority detailed previously will also play a critical factor in increasing leisure visitors to Wake County. These Key Attractors also deliver experiences tied to unique characteristics of Wake County and serve as anchor sites with the critical mass of destination assets sought by a leisure traveler planning a vacation. The recommended blockbuster exhibits strategy and the other opportunities to strengthen programming will generate interest and demand among potential overnight visitors.

As detailed in the Events Section, the development of high prolife events that will attract leisure visitors is an important aspect of attracting more leisure travel in the future.

Visitor Services

While a range of unique and compelling attractors and experiences are key to growing visitor demand, the actual encounters visitors to Wake County have with front-line staff are equally important in setting perceptions of Wake County as visitor destination. As such, visitor services will play a vital role as Wake County works to reach its goal of reaching 21.7 million visitors by 2028. As the visitor demand grows, demand for visitor services will grow. Such services encompass everything from working with partners to inventory available visitor-facing opportunities to ensuring visitors have the information needed while they are in the county. As noted in the Meetings and Conventions priority, the GRCVB services team will be critical in supporting the initiatives within the DSP.

- **Workforce development** – Workforce development is a foundational tourism component because of the need for qualified staff in the county especially in front-of-house or customer-facing tourism and hospitality businesses. As with meeting and convention attendees, the tourism assets and amenities in the county for leisure travelers should be staffed with trained workers. This can be a challenge when resources are scarce. Within this priority (as with the Meetings and Conventions priority), there is potential to grow and revise the current customer service training program that is designed to inform and elevate standards of service for Wake County’s tourism industry. Ideally the existing program could also be updated as needed and participation among the local hospitality partners expanded. The ultimate goal of the program is to have an informed, well trained hospitality workforce that can deliver a high-level of service, reflect the brand of the destination and support repeat visitors to the County.
- **Accessibility** – As Wake County’s tourism landscape continues to evolve over the course of the 10-year DSP, accessibility should continue to remain an important consideration. This could be everything from how new transportation services are planned to how to access visitor experience that may not have been easily accessible by a visitor in the past.
- **Support the Experiential Visitor (People-First) Inventory** – To build upon and broaden the People-First program will require significant support. The GRCVB services team could play a critical role in launching this initiative by working with partners and serving as the curation arm for experiences. This could include site visits to vet experiences, working with vendors to enter their experience into the system and potentially connecting visitors to the experience information created by People-First or the other experience suppliers.
- **Provide concierge-style service out of the Visitor Information Center** – The Visitor Information Center (VIC) and GRCVB services team already provide information to visitors customized to their needs. However, as visitor demands evolve and the range of visitor-facing experiences in the county grow, the visitor services experience within the VIC should grow and evolve to meet that change. Such change could include having elements of People-First experiences in the VIC to give visitors a sense of what to expect if they choose such an experience or having an extension of a museum exhibit onsite for visitors to engage and preview. The focus on increased visitor services could evolve to offering a full-scale concierge onsite, either at the VIC or at meetings and conventions or sports events of a certain scale of overnight visitors.

Leisure Travel Takeaways

As a growing, vibrant destination, Wake County has much to offer an individual leisure visitor. However, today those experiences are not as interconnected as they could be to deliver an experience that would cause a person to choose Wake County for a vacation. To compete with the Nashvilles and Austins of the world, Wake County will need to look inward at those people and experiences that are unique to the community to strengthen its visitor offerings. Those makers, creators, artists and passionate minds that live and work in Wake County are what make this community special. Providing an opportunity to experience that Quality of Place through the lens of an individual leisure traveler is what will separate Raleigh and Wake County from other destinations competing for a tourist's dollar.

6. Destination Development

Priority Focus

Develop a long-term plan or set of principles with buy-in from both the hospitality and development sectors that will include consideration of a development's potential to help attract overnight visitors in the county's overall planning and development process in the future.

Through the DSP, Wake County has an opportunity to address product development opportunities by encouraging land owners to repurpose or redevelop key parcels throughout the county to serve visitor and resident attraction needs. The concepts and parcels included within this section are merely possibilities to illustrate the potential of concentrating visitor assets and strengthen the county's tourism product inventory. Each must be thoroughly examined, including all due diligence to determine true potential for destination relevance and feasibility. JLL identified these illustrative parcels based on feedback from stakeholders, municipalities, developers and JLL's local market division's knowledge of specific sites. This plan, with a few exceptions, does not prescribe a specific use for the land or redevelopment. Additionally, the plan does not assign a role to a specific group to acquire, develop or operate the resulting development. The parcel examples are one way to encourage municipal planning leaders and individual land owners to consider the perspective of overnight visitor when formulating development concepts and plans. To begin vetting this concept, JLL recommends destination partners and municipal entities engaged in visitor attraction begin an ongoing engagement with Wake County's local and active developers to evaluate future opportunities. The hospitality community can provide great and needed perspective on how a planned development can help to trigger or encourage overnight stays.

Overarching Goal

JLL's interaction with some of the potential future developments raised the importance of considering how a project could ultimately be a visitor attraction. The goal of the Destination Development priority is the development of a long-term plan or set of principles with buy-in from both the hospitality and development sectors that will include consideration of a development's potential to help attract overnight visitors in the county's overall planning and development process in the future.

Importance of the Development Community

Once consensus is built and the development opportunities are vetted and fleshed out, the opportunities should be communicated to area economic development professionals to connect with interested private developers where applicable. Any County funding support for options for the destination development/asset must be fully related to the proposed use of the parcel and expected impact on increasing overnight visitation. These parcels received specific attention in the DSP based on the likelihood that the development concept would provide a destination amenity, improvement or enhancement. The details of how such development is

accomplished and brought to reality should factor into funding decisions if Interlocal funding is pursued. JLL recommends that local and active developers are engaged in the identification and vetting process to give insight on the potential of current and future opportunities for Wake County.

Opportunities

Destination product concepts are possible within each of the following opportunities. JLL has also included criteria for and a schedule of importance for the opportunities within the DSP’s timeframe.

Blue Ridge Road

The Blue Ridge Corridor as it is known is a potential opportunity for establishing a scientific, medical, agricultural, sports, entertainment and arts campus. The transformation brings a destination perspective to the North Carolina State University College of Veterinary Medicine, the North Carolina State Fairgrounds, Carter-Finley Stadium, PNC Arena, developable land for entertainment and hospitality assets, the North Carolina Museum of Art, Rex Hospital and a number of related business opportunities within the district. The opportunity to develop the area around PNC arena coupled with potential renovation and upgrades to the arena itself has the potential to create new visitor options in the future.

Within this corridor, there are a significant number of anchor institutions but very limited service amenities. Investments within each of these anchor institutions is projected to continue into the future and result in more awareness, interest and visitation to the neighborhood. The prominence of the sports venues along the corridor with both Carter-Finley Stadium and PNC Arena suggest that future parcel development consider entertainment and overnight hospitality amenities to enliven the district during pre-, post- or non-event times. Adaptive reuse of state-owned property should be considered for adding depth to this area, especially through mixed uses that include hospitality and service elements. If development concepts are successful, then adding shuttle transportation connecting the corridor’s assets would be an important next step.

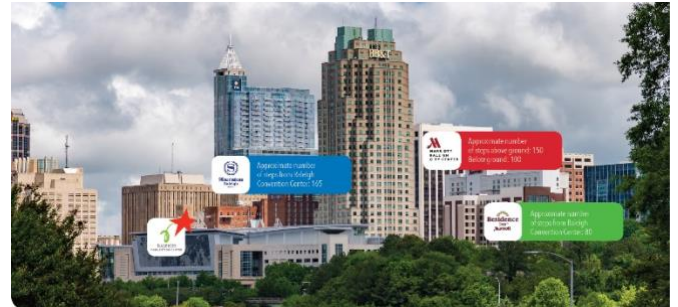


Criteria & Schedule for DSP Advocacy

Criteria & Schedule	Level
Development priority by 2028	High
Opportunity for community transformation	High
Opportunity for destination assets	High

Downtown Raleigh District

As noted in the Meetings and Conventions section, Wake County has five primary clusters of meetings hotels. One of those clusters is the Downtown District. Within that district is the anchor site of the RCC. This area provides the opportunity for building a stronger support structure for the RCC through added convention focused hotels and hospitality services. Additionally, the expansion and enhancements at the RCC change the level of engagement and visitation to this area. The plan that has been laid out in the DSP for the future of the RCC will stimulate additional activity in the Convention District. The additional activity will drive demand for more entertainment, hospitality and food and beverage options near the convention center. The City of Raleigh with input and support from GRCVB, the Wake County Hospitality Alliance and the Downtown Raleigh Alliance should plan for the future of the convention district. Understanding the entertainment and service needs of convention and event attendees will help establish future preferred land use and development priorities.



Criteria & Schedule for DSP Advocacy

Criteria & Schedule	Level
Development priority by 2028	High
Opportunity for community transformation	High
Opportunity for destination assets	High

Cary Towne Center Redevelopment

The redevelopment of the Cary Towne Center could potentially enhance the region as a competitive convention, meetings and sports destination. The location of the mall property is advantageous with nearby amenities and roadway access. IKEA originally targeted the underutilized mall property for its second store in North Carolina, but then changed direction. The development of the Cary Towne Centers site could spawn additional development in and around the site. Potential development would address some of the needs outlined in the DSP and fill a void in the current marketplace. It is recommended that the Town of Cary work closely with the site owners to develop the direction of this site and the vision for the surrounding area.



Criteria & Schedule for DSP Advocacy

Criteria & Schedule	Level
Development priority by 2028	High
Opportunity for community transformation	High
Opportunity for destination assets	High

Government Campus Redevelopment

The redevelopment of the aging governmental campus in the north portion of downtown Raleigh presents a great opportunity to enhance the visitor experience. This area holds promise for mixed-use development with governmental tenants being the primary day user and entertainment and sports offering evening activities. Proposed development has been tied to pursuit of MLS franchise, as mentioned previously in the Sports section of this report. The important consideration in the development of stadium is the ability for the new venue to be active throughout the year. It is recommended that multi-purpose components be factored into the design for the stadium to create a broad spectrum of opportunities including those that will attract overnight visitors. A new venue that can house a major league sports franchise and drive year-round demand has the potential to be a catalyst for the development of this area.



Criteria & Schedule for DSP Advocacy

Criteria & Schedule	Level
Development priority by 2028	Low
Opportunity for community transformation	High
Opportunity for destination assets	Low

*If state support, including resource allocation, for redevelopment exists this could be a higher priority.

Central Prison/Governor Morehead School for the Blind
 Potential opportunity for establishing a usable connection between Dorothea Dix Park, downtown Raleigh and N.C. State University. This redevelopment opportunity spans a significant amount of acreage connecting key visitor resources. Amenities and development should include but not focus entirely on visitor needs.

Criteria & Schedule for DSP Advocacy



Criteria & Schedule	Level
Development priority by 2028	Medium *
Opportunity for community transformation	High
Opportunity for destination assets	High

Meadowbrook Golf Course

Conversion to fields for soccer and baseball is the targeted development concept for Garner’s Meadowbrook Golf Course. The proposed redevelopment of the region’s first African-American golf club by the Town of Garner would provide a needed recreational asset in a part of Wake County that is currently underserved by parks of this type. Nearby amenities would add to the attractiveness of this site for tournaments.



Criteria & Schedule for DSP Advocacy

Criteria & Schedule	Level
Development priority by 2028	Medium
Opportunity for community transformation	High
Opportunity for destination assets	Low

Knightdale Fields Development

Development opportunity for a regional soccer complex to serve growing population in eastern Wake County. Phased development of the parcel has been proposed with the plan for the first five fields recommended for 2018 Interlocal funding. The complex is tied to continued growth of NCFC. Completion of the full park development concept provided access to tournament quality fields for the underserved eastern portion of Wake County.



Criteria & Schedule for DSP Advocacy

Criteria & Schedule	Level
Development priority by 2028	Medium
Opportunity for community transformation	High
Opportunity for destination assets	Low

Rolesville Frazier Park Development

Potential opportunity for park development in an underserved area of Wake County. Soccer and play fields were originally proposed for the site; however, the concentrated wetlands and watershed running through center portion of the parcel limit access and restrict certain uses. Achieving an optimal field count for tournaments will be challenging for park planners. The Town has involved Sports Facility Advisory to conceptualized possible uses and constraints.

This parcel, based on its layout challenges, will require creative concepts for its overall development as a park. The desired development of field potentially would need to shift to another creative use. One potential creative use would be an adventure fitness park capable of hosting mud runs and obstacle courses. No current regional park provides a dedicated use for adventure fitness and the park could host a collection of traveling events and competitions. The use and potential for return on investment would need detailed further study.



Criteria & Schedule for DSP Advocacy

Criteria & Schedule	Level
Development priority by 2028	Medium
Opportunity for community transformation	Medium
Opportunity for destination assets	Low

Potential County Park Land

Exploratory consideration by Wake County of additional parkland and conversion of a former golf course property. Potential opportunities and activities would require co-existence with residential neighborhood. Connections to greenway system would be valuable for continuing to advance the area's attractive livability. Future opportunities for the county to bond for parks, greenways and nature preserves will add to the attractiveness of Wake County as a destination. Constructing county parks should continue to be an investment priority for providing recreational opportunities to both residents and visitors.

Criteria & Schedule for DSP Advocacy

Criteria & Schedule	Level
Development priority by 2028	Medium
Opportunity for community transformation	Medium
Opportunity for destination assets	Low

Destination Development Key Takeaway

The development community should be proactively involved when sites are identified. The ability to engage these thought leaders can help them be effective advocates in support of current and future projects. In all cases it is recommended that demand analysis is conducted to study the potential visitor impact and determine what modifications or enhancements will increase attractiveness.

7. Regional Demand Drivers

Priority Focus

Advocate on behalf of those assets and leverage them to continue to extend the destination brand and support new overnight visitor travel into Wake County.

Overarching Goal

As noted in the Background and Current Situation chapter, Wake County has experienced significant growth in residential population and equally significant momentum in economic development and innovative, entrepreneurial business opportunities. This economic momentum has been spurred and sustained, in large part, thanks to the resident higher education assets of the county, as well as the established Research Triangle Park and the many globally known companies and research operations that have made Wake County their home. Because of their combined power to drive economic activity and extend the destination's brand as a technology-led region with a deep labor market (available jobs), a focus area of the DSP is to identify ways destination partners can continually support and leverage these

Regional Demand Drivers. The saying "a high tide raises all boats" is also true in the case of the relationship between the Regional Demand Drivers and the destination as a whole. Economic vitality and continued growth will raise Wake County's visibility domestically and internationally, while the attractiveness of Wake County as a visitor destination helps lure potential visitors and companies to "check out" all the county has to offer and could sway site location or career decisions.

The goal of the Regional Demand Drivers priority is to advocate on behalf of those assets and leverage them to continue to extend the destination brand and support new overnight visitor travel into Wake County.

Economic vitality and continued growth will raise Wake County's visibility domestically and internationally, while the attractiveness of Wake County as a visitor destination helps lure potential visitors and companies to "check out" all the county has to offer and could sway site location or career decisions.

Identified Demand Generators

The assets that spur development and drive demand into the region, including Wake County, include corporate entities, higher education institutions and industry clusters. These assets are educating youth, employing some of the brightest minds in the world, and are the source of demand for much of the county's transient business travel. Wake County is a beneficiary of these assets and should continue to drive awareness of their importance to the county's overall economic health, as well as help service those visitor markets. These Regional Demand Drivers, for purposes of the DSP, are identified as follows:

Regional Demand Drivers

- RDU International Airport
- N.C. State University
- Duke University
- University of North Carolina
- Additional Higher Education Institutions
- Research Triangle Park
- National and International Corporate Business Locations
- Culinary and cultural icons within the region
- Sightseeing and attractions outside the region

Each of these demand generators can each be tied to specific market opportunities. Higher education plays a significant role in all forms of travel to the region including business, convention, leisure, sports, personal and international. The critical mass of the region's higher educational institutions factors heavily into travel decision making. The external business community's level of awareness of Wake County as a destination, both at a corporate brand level and with the Research Triangle Park, also delivers significant opportunity largely in convention, business, meetings and education travel. Within convention, meetings, business and education-related travel segments, destinations typically must compete heavily against one another to secure these bookings. Similarly, sports tournaments require a decision on a singular community. The DSP recommends that GRCVB independently include regional offerings in its packaging for pursuing conventions, meetings and sports.

Domestic leisure opportunities offer more connectivity for regional partnerships. GRCVB must weigh priorities and develop the ability to assemble regional leisure programming.

International Travel

Impacting international travel decisions depends on a strong regional presence with the “region” being defined primarily around the marketplace being pursued and not municipal jurisdictions. Pursuit of the overseas, long-haul traveler is not an easy or simple process, especially if effectiveness is measured by the immediacy of the ROI. Efforts to cultivate the international market require time to build connections, investments to build awareness and commitment to build product.

Wake County finds itself among this list of smaller regional destinations that see heavy potential for international market growth and development. Successful pursuit of that potential will require a strategy unlike the other second tier destinations vying for recognition and space within the same international marketplace.

Development of the international market is a priority within the DSP, but it is a priority that comes with a major caveat. Wake County should only pursue the overseas marketplace through a formal connected set of regional partnerships. Separate plans and approaches for each overseas, long-haul market should be crafted in partnership with the most advantageous aligned regional partner.

Under no circumstances, however, should Wake County pursue an overseas market independently without collaboration with regional partners. Leveraging regional demand drivers requires collaborative programming with other destinations both within North Carolina and outside the state. Current top markets for producing international travel to North Carolina are projected to change greatly over the next 10 years.

According to the U.S. Department of Commerce, international visitors arrive for a variety of reasons.

Main Purpose of Trip (% of 2015)	China	UK	Germany	India	Mexico	France
Vacation/Holiday	39	66	56	15	51	63
Visit Friends/Relatives	20	19	21	31	20	17
Education	16	1	4	5	4	2
Business	14	9	12	36	18	12
Convention/Conference/Trade Show	10	5	6	12	6	5

U.S. Dept. of Commerce International Trade Administration National Travel and Tourism Office, 2015 Market Profiles, 2016

China Market Potential

In 2016, the 62,000 Chinese visitors to North Carolina placed the market as the fourth ranked international travel market to the state (Visit North Carolina, 2016 International Visitation to North Carolina, 2017). The market has grown by over 400% since 2008 and is on pace to overtake the United Kingdom in visitation within the next five years. China has already moved into the second spot for international spending in North Carolina behind Canada, overtaking the United Kingdom in 2014.

North Carolina is not alone in experiencing these dynamic market growth patterns. Destinations across the United States are actively soliciting or preparing to pursue the Chinese outbound market. That the market interest in extending beyond the traditional U.S. travel product mix creates true opportunity for second- and third- tier destinations that are not typically must-visit U.S. destinations for the long-haul overseas traveler. At first glance the Chinese market participates in activities that mirror many other international markets with shopping, sightseeing, experiencing fine dining and National Parks/Monuments being the highest ranked activities pursued by Chinese visitors (U.S. Department of Commerce International Trade Administration National Travel and Tourism Office, 2015 Market Profile: China, 2016). It is a clear difference in trip purposes that distinguishes the Chinese market from other overseas markets and this differentiation is prompting the second and third tier U.S. destinations to formulate targeted market development strategies.

2015 Market Profile: China

Activity Participation While in the United States

Activity Participation While in the U.S. <i>(multiple responses)</i>	2014 (Percent)	2015 (Percent)	Point Change ^o
Shopping	89	87	-2.0
Sightseeing	79	81	1.5
Experience Fine Dining	51	51	0.1
National Parks/Monuments	40	45	5.2
Art Gallery/Museum	39	42	3.4
Small Towns/Countryside	39	41	1.8
Amusement/Theme Parks	34	36	1.1
Historical Locations	25	30	5.5
Cultural / Ethnic Heritage Sites	22	24	2.7
Guided Tours	22	20	-1.7
Concert/Play/Musical	15	14	-0.7
Casinos/Gamble	13	13	-0.6
Water Sports	11	12	0.7
Environ./Eco. Excursions	11	11	-0.2
Sporting Event	12	10	-2.3
American Indian Communities	8	9	1.5
Camping/Hiking	7	6	-0.7
Nightclubbing/Dancing	6	6	-0.3
Golfing/Tennis	4	4	0.2
Hunting/Fishing	3	3	0.2
Snow Sports	2.3	2.1	-0.2
Other	1.4	0.9	-0.5

The Chinese market lists Vacation/Holiday as the number one main purpose of trip with 39% of the trips taken in 2015. This purpose is followed by Visiting Friends/Relatives at 20%, Education at 16%, Business at 14% and Convention/Conference/Trade Show at 10%. Compared to other international markets, the higher propensity towards Education, Business and Convention/Conference/Trade Show travel creates direct alignment with Wake County assets. The opportunity has been embraced as a priority for the DSP.

For the purposes of this Destination Strategic Plan, four separate opportunities have been identified and development plans established based on their association with market trends.

1. Gateway entry
2. Key Assets
3. Market Development
 - a. Established Market Awareness – Canada and U.K.
 - b. Emerging Markets – France and China
4. Market focus and support services

Other markets could undergo the same level of planning.

Gateway Entry

The Raleigh Durham International Airport (RDU) currently has international non-stop flights to the following cities: Cancun, London, Montego Bay, Paris, Punta Cana and Toronto. Advancing enplanements from each of these points of origin is a priority of this long-range plan with GRCVB working collaboratively with regional partners to boost awareness, interest and travel bookings. Brand USA, Travel South and Visit N.C. must factor heavily into this approach.

Key Assets

The collective technology and educational assets of the Research Triangle form the key drivers of interest in the region from the Chinese marketplace. This market must be approached based on access to businesses and higher education institutions with emphasis placed on prominent brand names. Citrix, North Carolina State University, Red Hat, the University of North Carolina – Chapel Hill and others will be major players in this arena but the established reputations and Chinese connections with Duke University (Kushan Campus),



Smithfield Foods (majority Chinese ownership for this Virginia-based company), Caterpillar, and Lenovo (North American headquarters in Morrisville) provide an enviable brand awareness base from which to build. The regional dynamics of this market stretch the normal concept of a business development region, but the audience being pursued is over 7,000 miles away. This audience will travel to conduct business, seek out educational opportunities and visit friends and relatives.

The pursuit of other long-haul travelers requires a definitively different regional construct. Normal destination marketing jurisdictions are drawn around cities and counties. In the case of the international marketplace, the regional boundaries must be constructed around asset locations. This marketing region would incorporate assets as far as Asheville to the west, Atlanta to the south, the Outer Banks to the east and Washington to the north.

Market Development (Established and Emerging)

For the North Carolina based marketing region, the Key Attractors introduced above produce great opportunity.

The sites listed above and others must incorporate China ready practices and updates within their operations to be successful, but the base product has potential for this market. The other attractions within the region should not give up hope as the Chinese market is evolving and the types of experiences they seek continues to change. Market understanding and product development will be key dimensions of a China ready program that incorporates Wake County.

Canadian and European long-haul international markets like the United Kingdom and Germany seek more sightseeing and destination activities. The celebrity status food scene of Raleigh combined with historical based tours forms a more traditional product offering for enticing these travelers. Partnerships for tour routes heading towards Asheville, the Outer Banks, Charleston, Savannah and Atlanta or Washington, D.C. can be valuable for itinerary based fly-drive visitation. Partnerships with beach destinations from the Outer Banks to Wilmington can be wielded to provide a new alternative to Florida, especially in August when European and Canadian travelers are seeking vacation spots and North Carolina schools are back in session.

Market Focus and Support Services

Partnerships are critical for success in the long-haul market. When RDU announced the intentional effort to develop non-stop flight to China, the Research Triangle Partnership was specifically slated as organization that should lead the strategic development efforts. Throughout the course of this Destination Strategic Plan,

Partnerships are critical for success in the long-haul market.

strategic leadership will likely change, but change comes with costs. The overseas market is developed through relationships that are cultivated over time. Consistency in representation and approach is enormously critical for success. Key strategic relationships must be fostered within the region to develop the right product mix and overall approach. These regional relationships should require both an investment of time for building the program and dollars for executing the overall promotional strategy. Wake County businesses and organizations should be involved in each of the listed market initiatives, but leadership should be heavily led by private industry. Corporate support would rally funding, provide direction and insight, assist with implementation of support services and connect with arriving visitors through established meetings or educational programming. GRCVB is envisioned to be a tourism leader in partnership with other regional tourism offices. The role of the tourism offices would be twofold, (1) establishing sales and promotional outreach to Chinese market representatives and to receptive tour operators and (2) coordinating the design and placement of visitor support services, particularly signage and language materials.

Leadership for these efforts would be established through concentrated market centric development meetings based on the matrix that follows. Interested organizations, businesses, educational institutions and others from across each loosely defined region would be invited to the organizing meeting. The desired outcome would be articulating the desired approach and constructing short-term and long-range tactics to pursue greater market penetration. Once the tactics were conceived and reviewed, budget prepared and potential partners drafted, assignments would be made and communicated in conjunction with the timeline for implementation.

Priority Markets	Canada	China	France	United Kingdom
Team leader	TBD	TBD	TBD	TBD
Key Convener	Visit North Carolina	RDU/Duke	Visit North Carolina	RDU
Destination organizations	Brand USA, Travel South, Visit NC, GRCVB, & others	Brand USA, Travel South, Visit NC, GRCVB, DCVB, CHOCVB & others	Brand USA, Travel South, Visit NC, GRCVB, DCVB, Asheville, Outer Banks & others	Brand USA, Travel South, Visit NC, GRCVB, DCVB, Asheville, Outer Banks & others
Industry Partners	RBC Wealth Management, Stantec Consulting Services, Linamar Forgings, Inc.	All regional universities, Lenovo, technology companies, Caterpillar, Smithfield Foods, Triangle Tire & others	Arkema, Inc., Schneider Electric USA, Sodexo	GlaxoSmithKline, MedPharm
Key Assets	North/South travel, Geographic proximity to beach and mountains	Industry meetings Higher education	Ease of entry, Geographic proximity to beach and mountains	Ease of entry, Geographic proximity to beach and mountains
Destination Product	Beaches Key Attractors	N.C. Museum of Art N.C. Museum of Natural Sciences	Food Beaches Key Attractors	Food Beaches Key Attractors
Market Approach	Media relations, Travel agents	Business & Higher Education relationships Travel agents Receptive Operators	Receptive Operators	Media relations, Receptive Operators
Support Services	Develop Air service China Ready business practices Language tools	Develop Air service China Ready business practices Language tools	Grow enplanements, Language tools in area businesses	Grow LHR enplanements

Developing the international market will require immersive, region-wide programming. This educational programming will help businesses understand service changes and investments that will be needed to meet or exceed international traveler expectations. These amenities and services will include the following:

- Welcome, directional and instructional signage
- Visitor information that highlights welcoming retail opportunities
- Smaller serving portions within certain restaurants
- Full breakfast included within hotel accommodations, including traditional cultural offerings
- Emphasis on safety and security

For the China market, the need for specific amenities and services would be more extensive, include signage in Mandarin, restaurant menus in picture format, slippers in hotel rooms, etc.

GRCVB will be an important resource for helping implement this approach to engage Regional Demand Drivers, but it should not be the sole leader, convener or organizer. Limited resources prohibit GRCVB from dramatically impact this market potential by itself. Partnering with Wake County industry and educational partners, particularly Lenovo, North Carolina State University, Citrix, Red Hat and others will be valuable for GRCVB's role in this market pursuit. The tactical planning for each market segment, especially with the regional tourism offices will be the most important next step as it redefines each destination region and is a different approach from the current international travel industry sales approach.

Regional partnering among GRCVB, the Durham Convention & Visitors Bureau and Chapel Hill/Orange County Visitors Bureau (CHOCCVB) around the topics of arts and entertainment calendar collaboration and higher education institutions has been in place for a number of years. The programming initiatives focused primarily on creating visitor resources and some limited domestic outreach. Regional programming to advance overseas market results adds a new dimension to these regional affiliations as the investment grows larger, the approach requires more communication and the program does not result in a completed piece of collateral. Long-haul tourism requires that destination organizations and their primary marketing or industry partners go into action for the long-haul.

8. Quality of Place

Priority Focus

Sew a thread of destination place-making within all areas of Wake County's future.

"If you build a place where people want to visit, you will build a place where people want to live. If you build a place where people want to live, you will build a place where people want to work. If you build a place where people want to work, you will build a place where business has to be. If we build a place where business has to be, we will be back to building a place where people have to visit."

- Maura Gast, Executive Director of the Irving, Texas Convention and Visitors Bureau.

In the context of the quote from Maura Gast above, the Raleigh area built a great place to live, work and study. By doing so, the region became a great place to visit. However, by needing to rely on these aspects of the community as some of the key differentiators to market Wake County to potential visitors, the task of elevating Wake County's Quality of Place becomes complex.

It is important to note the distinction between quality of life and quality of place. Quality of Life is defined by Britannica as "the degree to which an individual is healthy, comfortable, and able to participate in or enjoy life events." This term is most often used in economic development to recruit new businesses or develop a broader residential base.

For purposes of the DSP, Quality of Place is defined as the culmination of combinations including the critical mass of experiences created for residents and visitors to the community through economic momentum, public investment, private investment, philanthropic investment and the benefits of having a state capital as the anchor city in the county. Quality of Place includes all the assets today that residents love that can be positioned for visitors to experience. It can also mean planning for the future of such a place. Quality of Place is an extension of the brand essence of the community.

What Currently Sets Wake County Apart

Throughout the research and development phases of the DSP, stakeholders and residents bemoaned the lack of a clear key travel driver that would spark true interest and awareness in the destination.

When Stakeholders were asked about destination strengths, the word association that emerged showed no clearly distinctive attribute. Parks, Sports, Museums, Downtown, and Arts were each positioned at the same level, followed closely by Culture, College, Food, Restaurants and Universities.

Events Craft Beer Breweries Proximity Music
 Beach and Mountains Culture Greenways College
 Location Parks Weather Sports
 Convention Center Museums Capital Arts
 Green Downtown Local Food RDU Restaurants
 Variety Universities History

The list appears to show a diverse, vibrant, active destination that would have market appeal to many visitor groups. The list also seems to capture attributes that are highly sought after by potential residents choosing an area to live.

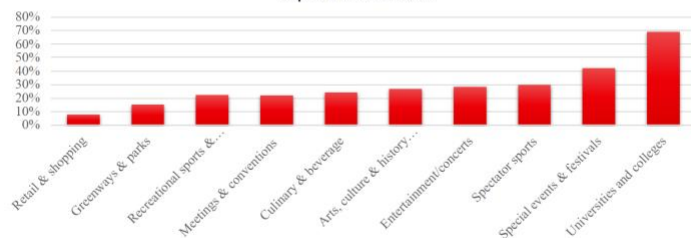
Residents of Wake County were equally unsure of the area's true destination appeal. Resident survey responses highlighted a

perceived awareness and assumed drawing power of universities that far surpassed other potential destination products. As this chart shows, variances in the perceived appeal of special events, spectator sports, entertainment and concerts, arts and culture, culinary, meetings and conventions, recreational sports and parks were fairly nominal. Residents ranked shopping assets as the lowest potential driver among this list likely viewing the area's retail options as being focused on filling local resident needs versus being compelling enough to elicit overnight visitors.

When these same residents were asked to document their perceptions of what individuals in other cities knew about Raleigh/Wake County, the response was overwhelmingly focused on four features of the region's livability: Great universities and colleges, Opportunities and jobs, Great place to live and Research Triangle Park. These livability assets were so firmly entrenched in the resident perceptions that the lowest ranked of the four was still 30 percentage points ahead of "Great food and drink scene," the fifth highest ranking awareness factor.

Resident Survey

The following list includes various attractions that draw visitors to Raleigh/Wake County. Based on your perceptions of their appeal to potential visitors, please select what you feel are the top three drivers.



Visiting friends and family was the highest open ended response.

Resident Survey

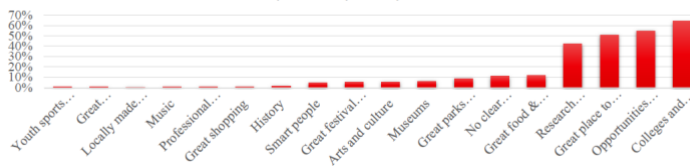
Most open ended responses were "nice"

- Good place to live
- Good schools
- Affordable
- Family values

There were a few comments around the political climate

- Backwards politics
- Perception of negative conservatism

In your opinion, what do you believe people living in other places think about Raleigh/Wake County? Please select your top three perceptions.



This finding was consistently probed in interviews and focus groups to determine the impact of these perceptions. These interviews substantiated the survey findings with an undertone of pride in the place. The basic sentiment could best be summarized by a feeling that Wake County is a successful travel destination welcoming nearly 16.45 million visitors in 2017 that drive over \$2.53 billion in travel spending and this economic production is happening despite not having a demonstratively appealing destination driver. The individuals and groups that provided this input were not upset or saddened by the reality of the perception, but rather they maintained a

realistic stance that Wake County was just simply a great place for economic opportunity and employment. This could also be that very few in the community have considered the area has enough assets to now tout the region as a great place to visit. This may not be the majority shared psyche of Wake County's residents.

The tourism industry thrives off economic opportunity. Business travel is enormously dependent upon the economic health of area employers. Meetings and conventions configure around topics and local sources that are connected to key industries. Economic opportunity is a driver of tourism, but it is not typically viewed as a targeted strategic area for the destination marketing and promotion efforts, with the recruitment of connected conventions being a recognized exception. Destination development efforts concentrate more explicitly on quality of life features. These quality of life components house the activities that visitors and residents both enjoy. Entertainment, sports, tranquil parks, shopping and dining are clear components of quality of life. So are safety, ease of access, ease of getting around, climate and health.

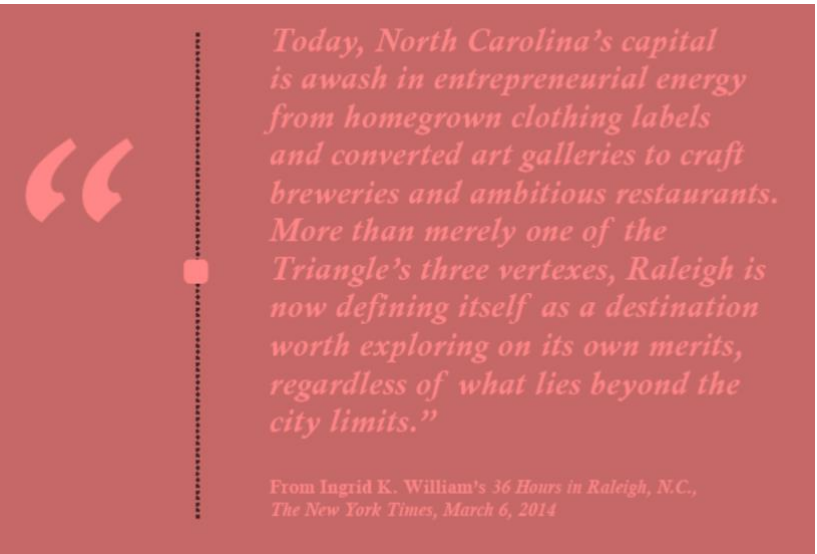
Quality of life is abundantly high throughout Wake County. The area routinely finds its way into top places on quality of life, places to do business and other community comparison rankings.

The popularity and interest created by this level and quantity of praise in the area fuels a growth cycle that shows no signs of slowing. Potential residents see the area's vitality and they want to move to Wake County bringing diverse talents, skills and acumen to the region. Prospective employers, especially in science and technology sectors, see this talent pool and want to move to the county to have access to the skilled workforce. Students graduate from area institutions and stay for the opportunities offered by the talent hungry employers. And so, the cycle continues.

The level of interest in Wake County has caused the region to shift into rarified level of respect typically applied to high growth, high tech areas like Silicon Valley, Seattle, Boston, Austin and Nashville. Over the last year, Raleigh has been one of only three cities to make it to the coveted finalist decision making phase for the next Apple complex, the high-profile Amazon HQ2 and the U.S. Army Futures Command Center.

As the center of the brand is the community name that carries the most recognition. In comparison to the earlier Orlando example, "Raleigh, N.C." makes its county and communities stronger as a destination through connecting its greatest strength to the destination brand. For Orlando it is the memories sparked by a family vacation. For Raleigh and Wake County it is the innovative hospitality of its people. The brand is as real and authentic as the place.

This DSP firmly establishes that the livability of Wake County is at the heart of its destination appeal. There is not one singular driver that the destination is currently known for, but rather the collective blend of all aspects of the county creates a distinctively vibrant place to visit. This claim should not be construed as an endorsement of a "livability" promotion campaign, as it would not be authentic nor compelling, but rather to an endorsement



that building a brand climate around livability, which Wake County has successfully accomplished would be of value.

There are many communities that offer quality of life and their destination marketing efforts often showcase quality of life through sidewalk bistros, parks, shopping and nightlife. Raleigh and Wake County extends this approach further by connecting with the people that pursue these different community assets. The Passionate Minds approach (noted and expanded upon below) is fully focused on supporting not just quality of like but quality of place.

As Wake County shrouds itself in exploiting and leveraging its current brand promise, intentionality should be placed on building a stronger linkage to this notion of quality of place. The following needs should be filled to continue the successful growth of the region and ties to the destination:

- Culturalize the Passionate Minds brand
- Prepare for Population Growth
 - Plan, Develop & Coordinate Parks and Greenways
 - Plan, Develop and Coordinate Entertainment
- Alleviate Transportation Concerns
- Add Iconic Features and Attractors to the Landscape
 - Establish a landmark fund
 - Encourage creative public art and high-profile activations
 - Develop a one-of-a-kind attraction

Initiatives

Culturalize the Passionate Minds Brand

The entrepreneurial, crafty, humble, open-sourced mindset of the technology and life science workforce that made the Wake County area so attractive to these employers is the basis for GRCVB's Passionate Minds brand promise. The brand promise is built on powerfully, creative individuality. The local "celebrities" featured with this brand embody the personality, diversity, hard-working mentality of the region.

The Passionate Minds brand messaging is on target and captures the strengths of the area. As much as the brand has created mystique and a powerful connection to its core promise, the brand lacks visibility and use locally, both within and outside the area's tourism industry. Within the boundaries of the City of Raleigh the brand is most visible near the convention center. Efforts should be taken to blanket the area with visual reminders of the brand promise and gain commitment within the stakeholder community to embrace the brand and brand promise. This immersion into the brand promise should first start with the hospitality industry

DESTINATION BRAND PROMISE STATEMENT

Visitors to Raleigh will depart feeling enriched by what they have experienced in this Southern capital city, thanks to Raleigh's smart and passionate residents who are shaping the growth of the historic city's emerging creative businesses, innovative festivals and food establishments, passionate music and sports scenes and modern cultural experiences.

using digital connections, stand-up displays and even apparel to highlight the pride in place that exists in the area.

GRCVB and its marketing agency should work together to accomplish the following:

- Establish brand immersion goals for the next five years
- Develop a brand asset toolkit to distribute to the hospitality industry
- Incentivize and reward brand apostles with promotion and features in newsletters
- Highlight targeted business outside the hospitality industry for brand engagement
- Empower the Passionate Minds representatives to act as a speaker's bureau
- Perform a publicly televised search for the next class of Passionate Minds members
- Activate brand messaging at targeted events and gatherings throughout the community

Wake County communities outside the City of Raleigh can and should actively engage in the destination's brand beyond the logo concept. Places like Cary, Wake Forest and Garner live together in the Raleigh area but cling to their own individuality and place. These surrounding communities want to see their name within a logo treatment. Indianapolis, Columbus and Minneapolis all have separate marketing efforts for the city and each of its suburbs. The end result of these disconnected marketing efforts is confusion of place. The visitor lives in other areas of the country, not locally. Place names matter locally. The communities of Wake County should work with GRCVB to develop localized brand engagement that highlights the dimensions of each municipality:

- Build brand promise concepts targeting how each municipality in Wake County is part of the Passionate Minds brandscape highlighting unique personalities, images and messages.
- Highlight the destination products of each community within GRCVB promotional pieces
- Encourage use of the extensive GRCVB database of assets for localized website and collateral development
- Develop logo connectors for each municipality that tie to the appropriate squares in the logo.



The overarching intention of this brand acculturation must extend beyond logos and data tools. The Passionate Minds message is not about a place name, it is about the place's people. The successful realization that all the communities in the area play a role in supporting that cast of residents is the ultimate goal in

localizing the brand. All brand related work should continually be focused on the initial promise of the Passionate Minds.

Prepare for Population Growth

By every projection the population of Wake County is slated to continue its growth trajectory. In their March 22, 2018, *News and Observer* article entitled “Wake wasn’t the Triangle’s fastest growing county last year,” Richard Straddling and David Raynor analyzed U.S. Census Bureau data to confirm that in the year of July 1, 2016 to June 30, 2017, 23,060 new residents were estimated to have established new residency in Wake County. This figure calculates out to 63 new residents per day. The Raleigh metro area is the 16th fastest growing metropolitan area in the nation. The increase in population within the county is

not projected to slow. The Urban Institute projects that the Raleigh area will hit a population of 2.7 million by 2030, an increase over the next 13 years of 500,000 new regional residents. (*Rolf Pendall, Steven Martin, Nan Marie Astone, Austin Nichols, Kaitlin Franks Hildner, Allison Stolte, and H. Elizabeth Peters, Urban Institute, Mapping America’s Futures, Brief 1: Scenarios for Regional Growth from 2010 to 2030, Jan. 2015*).

One of the catalysts for absorbing past growth has been smart community planning across the Triangle region. With aggressive and strategic land-use planning and smart investments in regional infrastructure, the region will not only fulfill these growth projections but also establish stronger bonds the current residents. Regional population growth will create more dynamic engagement within the sharing economy. Homesharing through apps like AirBnB are projected to become more prevalent, especially given the technology aptitude of the region and rising real estate costs. Ridesharing coordinated through apps such as LYFT and Uber provide new access to transportation serving both visitors to the destination and residents. Access to Wi-Fi and use of beacon related technology is slated to continue to progress through the course of the next 10 years. The DSP recognizes that technology enabled community development will be a progressive part of Wake County’s future. The DSP acknowledges that technological advancement and change should be continually reviewed and where appropriate accepted and implemented. Technology is a critical component of the rise in prominence of the region so early adoption of new opportunities is important.

Two additional hallmarks of the region’s past are solid investments in parks and greenway systems and continued funding of entertainment and cultural resources. Both parks and entertainment are enormously important to the county’s perceived Quality of Place.

Plan, Develop & Coordinate Parks and Greenways

Weaknesses, Threats & Opportunities



Top Weaknesses & Threats

- Transportation infrastructure/ Traffic and congestion
- Politics (and perception of)
- Lack of natural attractions (water feature)
- Weather in the summer
- Small town perception
- Lack of signature attraction
- Connectivity between assets/areas
- Hotel package
- Lack of professional teams and venues in the downtown core
- Lack of overall identity
- Crime and homelessness
- Growth and land use
- Lack of cohesion between promotional groups (GRCVB, RDU, Wake County, Triangle, RTP, etc.)

Top Opportunities

- Light rail
- Bold and progressive political stance (Austin vs. Texas)
- Preservation of open space
- Development of Moore Square
- Development of Crabtree as a water feature (San Antonio example)
- Youth sports
- Development of Dorothea Dix
- Sports spectator events
- Increased visibility of cultural assets
- Create a “must see” attraction
- Downtown events and activities
- More flight options out of RDU
- RDU trail center
- Major league sports

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7

The greenway system stretching across Wake County provides a valuable recreational asset to both residents and visitors. State, county and local parks are dotted across the county, each with a separate function. The County Parks system focuses on providing outdoor recreation and preservation of natural resources. The local parks have largely fulfilled recreational programming, particularly sports related activities. Greenways connect many of these systems providing another recreational opportunity and an alternative mode of transportation. The image of a vibrant parks system is a component of Wake County's attractiveness. All of Wake County's communities were interviewed for the DSP, and in each case the local leaders talked about the importance of parks and the need for continued investment in parkland, park development and park maintenance. Blending this perceived importance locally with the need to grow stronger as a destination should be a goal from the DSP. Park resources add to the community's appeal and are a source of pride among residents. Future park and greenway planning should be conducted with inclusion of the visitor marketplace. As noted, a very high-profile example of this is Dorothea Dix Park.

Efforts should be taken to connect local parks programming as the visitor does not recognize the physical boundaries of a municipality. Proactive communication across local parks systems can help to plan compatible programming and land use. This level of planning needs to be a major part of the region's future.

Plan, Develop and Coordinate Entertainment

Performing arts and concerts provide an attractive enhancement for a community. Wake County offers a robust blend of artistic and cultural offerings. Patrons to these pursuits consist of both area residents and visitors. Headliner, topflight performers have indoor and outdoor options for venues in all parts of the county. Galleries and museums dot the area to showcase the visual arts. Ballet, orchestra and opera are valuable institutions that demark artistic achievement for the area. The intent of most programming is focused on the local resident, but nearly all arts and cultural organizations acknowledge the importance of tourism.

Over the course of the destination strategic planning process, the vitality of the arts and cultural base of the area was heralded. There were perceived concerns expressed around the growth of arts and cultural activities being held in Durham. The greatest concern in the area was a large shift in Broadway style performances out of Raleigh. Overall the arts and entertainment product of the area is a strength of the area and a key dimension of its overall quality of place. Future efforts to connect the arts and cultural segment to tourism depend on the following tactics:

- Development of a truly coordinated countywide calendar of arts offerings
- Coordination and collaborative funding for a countywide arts marketing program
- Creation of arts packages for high interest programs
- Proactive and deliberate program planning to encourage cross-promotions
- Revisiting the Arts and Cultural Plan for the area to add greater relevance to the growing visitor base of the county.

These tactics must provide an intersection between resident needs and visitor desires. The resulting arts and entertainment strategy will enhance this important dimension of the area's quality of place.

Alleviate Transportation Concerns

In preparing for a region's future growth, transportation is almost always a top concern. Transportation concerns are typically shared across all populations regardless of whether the population lives in the area or simply visits the area. Within the DSP, transportation was the most frequently expressed concern. Congestion of the highways, growing demands on infrastructure, preparing for continued insurgence of new residents were elements of the discussions that surfaced around the concept of transportation. The respondents to the Resident Survey listed transportation as the area's greatest future challenge.

Solutions for this future were not often provided. Connecting these solutions to the growing visitation to Wake County provided an additional obstacle. A few ideas prevailed, although the feasibility of these solutions for the could be challenging either because of costs or usability:

- **Bus Rapid Transit** – The new plan to greatly enhance public bus transportation can provide some relief and connectivity, especially if the visitor experience is positive. In many destinations, visitors to a community will use the local bus transit system sparingly. The system must be creatively designed, reach throughout the destination and speedily stay on schedule to capture usage by a share of overnight visitors.
- **Commuter Rail** – Commuter rail concepts in most cities are focused on getting employees in more distant suburbs to key access points near employers. In some cases, business travelers will access commuter rail, and airports typically are included on the route. Commuter rail will often be provided on designated freight line systems; the priority given to freight use and the possibility of delays will not appeal to the visitor.

Potential visitor-facing transportation solutions, continued

- **Light Rail** – Evidence from Portland, Minneapolis, Austin and Charlotte show support the assumption that visitors will use light rail systems to move around a community and region. Connecting light rail systems to hospitality neighborhoods is an important dimension of destination planning. Not only will visitors use the platform to see different parts of the community or travel from hotels on the outskirts of town to key event venues or access the airport and train station of the area, but locally based employees in the hospitality sector will use light rail to get to and from work. The system must be consistently scheduled and have planned stops near key hospitality clusters. Crabtree, Brier Creek, Garner, RDU and Midtown/North Hills should all be targeted connections for a light rail system.
- **Alternative Transportation** – Creative concepts for mass transit outside of rail, bus or vehicles were collected during various DSP meetings. Gondolas connecting downtown to N.C. State University to Crabtree Valley Mall to RDU was an idea shared in the process. This idea sparked additional ideas for a targeted monorail system, driverless pods, and other technology based, one-of-a-kind transportation options.

This DSP does not endorse one form of alternative transportation over others, but it does encourage the creative inclusion of alternative options as part of future transportation planning. This direction includes both the highly complex systems like monorails and gondolas and the more simplistic but ever so important systems of biking and pedestrian. The visitor population would utilize any well-planned alternative transportation form, and in many cases the alternative transportation would provide an interesting and dynamic new product for the community.

The region will likely use different models of transportation for its future transportation needs. However, RDU International Airport will also likely remain an important transportation node for the region. RDU has grown service, capacity, customers and output in close coordination with the growth of the region. Today, the airport is ranked as the best connected medium sized airport in the county. The airport will continue to play a fundamental role in increasing tourism to Wake County.

Transportation solutions are expensive, especially when an entire system must be designed. The growth of the Wake County necessitates a heightened role for transportation planning. The immediacy of this need is intense and will only continue to grow more pressing.

Add Iconic Features and Attractors to the Landscape

Rank	Airport	Airport Connectivity Quality Index	2015-2016 Change
1.	Raleigh-Durham Int'l	185.2	7.0%
2.	St. Louis Lambert Int'l	175.1	0.4%
3.	Nashville Int'l	173.7	6.8%
4.	Austin-Bergstrom Int'l	152.8	2.0%
5.	Indianapolis Int'l	150.4	5.6%
6.	Kansas City Int'l	150.0	3.7%
7.	Pittsburgh Int'l	149.6	-1.4%
8.	Cleveland Hopkins Int'l	146.8	0.2%
9.	Louis Armstrong New Orleans Int'l	146.7	6.4%
10.	John Glenn Columbus Int'l	144.9	1.9%

Source: InterVISTAS

As noted earlier within the section, the residents and tourism industry stakeholder of Wake County did not feel there were identifiable community icons that resonate with potential visitors. Overcoming this weakness should be a focus for the implementation of the DSP. Over the short-term the area's key attractors can each play a role in driving destination interest. Beyond those efforts, the pursuit of iconic level additions to the destination mix should be a priority. JLL recommends that the area pursue the following opportunities related to building a more recognizable, iconic destination:

- Establish a landmark fund
- Encourage creative public art and high-profile activations
- Develop a one-of-a-kind attraction

Establish a Landmark Fund

The concept of adding iconic features arose on many separate occasions throughout the DSP process. Although there was never one singular iconic landmark devised through the process, the desirability of adding future recognizable landmarks to the region was an expressed need. Many communities have adopted public art investment requirements as part of any large-scale new development. Denver, in particular, has used this requirement to create a dynamic and iconic level public art program. Images of Denver landmarks often include artwork paid for by this development fund like the Big Blue Bear, the Dancers and the Blue Mustang.



This DSP recommends that a similarly styled investment program be legislated for Wake County. New development would be required to make investment into iconic landmarks and features as part of the building and planning process. This iconic level of development would be highly differentiated from public art programs, including using a separate destination level set of judges to determine the applicability of “iconic.” Requiring iconic style design and implementation would transform the destination and produce far-reaching economic development benefits. Adding iconic substance to Wake County would further enhance the area’s quality of place and resident community pride.

The funding for these iconic installation or landmark features would be structured similarly to public art required developer fees implemented in communities like Denver. The *1988 Executive Order No. 92* launched the Denver Public Art program by requiring developers of construction projects of over \$1 million to set aside 1% of the development budget aside for public art. Within the DSP, the recommended funding model is similar, but the focus of the fund investment is to enliven the destination with new iconic and landmark amenities. The details of this program concept will need to be crafted with input from visionaries around the community and perspectives gathered from other communities like Denver that have re-envisioned their community’s uniqueness through targeted investments.

Encourage Creative Public Art and High-Profile Activations

Iconic landmarks are very different in form and function from creative public art. To the visitors’ eyes, an iconic feature is a catalyst for creating interest in a prospective visit. In these same eyes, public art helps enhance and enliven that destination. If iconic features provide an added reason to travel to a destination then public art provides a worthy diversion while visiting that destination. In relation to the DSP, public art should continue to be pursued throughout Wake County. Throughout the interviews for this plan, the expressed role of public art was related to stretching the creative connotations of the area. Public art is often associated with vibrant communities. As one individual interviewed expressed, the county needs to “take risks” and “be bold” with future public arts additions throughout the county.

Develop a One-of-a-Kind Attraction

One of the most notable destination opportunities for Wake County is a direct extension from the concept of Quality of Place Priority and a connection to the Passionate Minds brandscape. As an area rich in both, the possible manifestations of this concept are endless. Within the context of the DSP, gaming developers should capitalize on the popularity and appeal of platforms to build a e-sports attraction with heavy visitor engagement activities.

The DSP captured the e-sports opportunity within the Sports priority, but the magnitude of local gaming studios in the marketplace extends beyond the spectator and competitor dimensions of e-sports. The development of a cross-connected destination product would mark a landmark opportunity, potentially on a similar level as immersive studios tours are in Hollywood. This product could be based on specific game titles, but should be planned for flexibility with future editions, new platforms and technology advancements.

This quality of place strategy encourages investment in a multi-faceted destination product constructed from the game titles and storylines of the region's gaming portfolio. This gaming destination campus(es) would certainly consist of e-sports facilities and retail opportunities, but the studios concept could be extended to include testing grounds of new gaming concepts, physically constructed game-based playscapes for actual interplay by gaming enthusiasts, tours of facilities and offices but not the development areas and opportunities to help make future game concepts come to life.

Industry experts predict that the current growth of gaming will result in an industry with more viewers than the movie industry. Building a studio based attraction, allows Wake County to capitalize on a local industry, create greater attention for a local business and erect an entirely new style of destination product. Constructing a gaming-based attraction on a grand scale provides the physical space for the game and its developer to have another entry into the lives of its fans, and in some cases their parents. It should be noted that estimates show the average player age as 25. This product would establish enormous traction with young potential employees and students while further enhancing the area's quality of place.

Branding a Destination

Some of the most powerful destination brands are constructed around distinctive imagery, geographic features, striking landscapes or iconic physical development. Regardless of local sentiment in the following locales, Orlando is synonymous with Walt Disney World in the same manner that Miami is known for fashionable beaches, Phoenix is connected to desert environments and Las Vegas embodies the notion of adult escapism. Not every destination benefits (or can benefit) from this type of physical association. For places that do not, branding efforts typically go one of three different directions as the place attempts to establish some level of promise to potential visitors:

- *Something for everyone* – Stating that the destination can serve all audiences.
- *Asset connection* – Establishing a mental touchpoint to a community asset.
- *Emotional* – Connecting to feelings evoked by the destination

These brand building approaches have varying degrees of success. "Something for Everyone" typically establishes little consumer value because of its inability to distinguish the destination from other places. Destinations that attempt to build a brand based on asset connections are limited by either how compelling the asset is, or isn't, to desired guests. This impact is elevated further if the asset has a low degree of awareness within the travel marketplace. The emotional option can create connectivity to the destination, but it requires heavily targeted marketing to gain traction and significant investment of resources to build results.

True success in destination branding occurs when these concepts are blended into a truly compelling and emotional connection to the destination product strengths. In the example of Orlando, the destination has captured its name as the largest city in the region. The destination's brand promise references its connection to Walt Disney World, but also extends this concept to include other key attractors like Universal Studios, SeaWorld, shopping and other attractions. The brand promise of the "never-ending story" provides the

emotional package that ties all the parts together while generating audience empathy through the lasting memories of travel.

Few destinations possess the demand drivers available to Orlando. Perceptions of product disparity can cloud the view of area residents into misunderstanding that destination attractiveness is not solely dependent on demonstrative assets.

As noted above, some destinations become great places to visit simply by being great places. Wake County is in this mix. Because Wake County is not known for a singular dimension or attractor, it must continue to play upon its strong quality of life to continue to differentiate itself. Additionally, Wake County should consider a future place-making strategy that also includes iconic features and creates that “one-of-a-kind” attraction.

Quality of Place Takeaways

Within the concept of quality of place, a destination embraces the attractiveness of the community to area employers and resident. The embrace includes quality of life features, especially parks and entertainment. The resulting quality of place direction highlights the livability of the destination as an asset for visitors. If the community is not known for a singular dimension or attractor, then the addition of an iconic asset becomes a future place-making strategy. The brand of the destination must embody the physical strengths of the area's quality of place and help differentiate it from other places.

These quality of place dimensions hold direct relevancy to Wake County. The strength of the region's quality of place is clearly visible in its popularity with current residents, students, employers and visitors. The DSP captures the essential elements of Wake County's quality of place and expresses it in the following strategic objectives.

- Culturalize the Passionate Minds brand
- Prepare for Population Growth
 - Plan, Develop & Coordinate Parks and Greenways
 - Plan, Develop and Coordinate Entertainment
- Alleviate Transportation Concerns
- Add Iconic Features and Attractors to the Landscape
 - Establish a landmark fund
 - Encourage creative public art and high-profile activations
 - Develop a one-of-a-kind attraction

The cumulative goal of quality of place elements in Wake County's Destination Strategic Plan is:

To sew a thread of destination place-making within all areas of Wake County's future.

This goal will help the region reach a higher level of product attractiveness for the livelihood and lifestyles of area residents while adding new capacity for welcoming future guests to the county.

Interlocal Fund Priorities

Interlocal Fund Priorities

In 1991, Wake County and the City of Raleigh entered into an agreement to govern the implementation and use of the countywide occupancy and prepared food and beverage taxes. The revenue from the taxes supports arts, culture, sports and convention facilities in Wake County, and the funds are governed by an interlocal agreement between the Wake County Board of Commissioners and the Raleigh City Council. According to the enabling agreement, the "interlocal funds" can be used across four categories:

- Convention Center Complex and PNC Arena projects originally designated in the enabling legislation (Section 1 and 2 of County Model)
- Other Major Projects expected to promote a high level of tourism activity and overnight lodging needs within the county or are expected to provide a high return on investment (Section 3 of County Model)
- Community Specific Projects that enhance more localized sports, cultural, arts and other quality of life benefits for county residents; typically associated with "daily" users and participants (Section 3 of County Model)
- Small Projects eligible for funding by the annual small project allocation that competitively awards funds based on a proposal process by Wake County (Section 3 of County Model)

As noted in the Background section of this report, tax collection to the interlocal fund related to tourism reached over \$53 million in 2017.

Determine Funding Priorities

In review of other capital and tourism funding programs, JLL finds that having an agreed upon set of priorities and criteria around which to base funding decisions is a best practice and is critical to the health of the such programs; the priorities ultimately ensure that the projects that receive funding have the intended impact of increasing overnight visitation. The more successful programs identify and set priorities on an annual basis, making the direction and expectations clear.

As noted previously, the county released "principles" for interlocal funding in 2017 to provide more clarity to stakeholders around why projects would receive funding support. However, Wake County's current application and enabling legislation for funding does not specify any priorities, only the above categories above as those general areas that can be funded.

While the enabling legislation and principles are helpful, they do not provide priorities or a clear vision of what is important as the county builds its tourism and community vision. Nor do the legislation and principles articulate what the County, tourism partners and broader industry stakeholders believe are the highest and best use for those funds.

To better align the investment Wake County and the City or Raleigh are making in the area's tourism infrastructure, JLL recommends that the County adopt the priorities identified in this plan as priorities for future funding tourism product initiatives (i.e., the first two categories). In doing so, decisions on funding will be based on those projects with the potential to most positively impactful increased overnight visitation and will invite respondents to think through and position their projects around those shared priorities. Further, JLL recommends utilizing the following as guidelines and criteria based on the specific type of request.

- Generating overnight visitors tied to funding
- Utilizing assets that are proven to cause overnight stays
- Including identified target markets with corroborating research.
- Requiring direct tracking of program conversion
- Leveraging partners and creating collaborative projects

Aligning with the strategic goals, objective and priorities of the DSP will ensure all tourism initiatives support the increased 2028 visitation goals and strengthen the county's tourism product. Proposed projects should also articulate which of the specific target markets (i.e., conventions and meetings, sports, an/or leisure) the project would predominantly serve.

Potential Projects Aimed at the Leisure Experiences

The opportunity to create leisure experiences to attract overnight visitors should be encouraged. There are several large individual leisure assets in the county today; many of which are classified as Key Attractors. However, creating a stand-alone leisure asset is rare and would require strategic vetting and positioning to reach the scale and differentiation to alone drive overnight visitors. A current opportunity discussed above, is the ongoing work to develop Dorothea Dix Park as a future destination park. These experiences should have a plan for testing or validating demand and a clear approach to measurement and monitoring.

This type of asset could be, and even should be, positioned as an iconic opportunity for Wake County. Feedback from stakeholders and assessments by JLL suggest that the area lacks an iconic element that further brands Wake County as a destination. Because it is, in essence, a physical manifestation of the destination's brand, creating such an iconic element as Dorothea Dix Park is a major opportunity that should be fully vetted and accompanied by an implementation plan. Communities only get one chance to create an icon correctly; therefore, any effort around such requires vision, collaboration and scale.

Potential Projects Aimed at Meetings and Conventions

Meetings and Conventions are an important, directly-tracked demand generator for Wake County. Over the last three years, there were over 70,000 room-nights booked in Wake County associated with activity in the RCC, and even more booked directly into hotel partner properties. There is an opportunity to expand on the existing business at the RCC as shown in the optimization plan in the Meetings and Conventions section by making targeted investments to increase the hotel package in the Downtown District and bring the room-night generation at the RCC to over 111,000. This would ultimately expand the ability of the RCC to deliver over 175,000 room-nights annually. Concurrently, investments are also needed to renovate and enhance the existing building and a process to identify needs of a further expansion should be started if additional hotel inventory is committed.

Potential Projects Aimed at Sports

The sporting events market is a proven success in Wake County and an area that warrants ongoing investment. The activities of GRSA to market Wake County as a sports destination have produced trackable results, with over 45% of the total hotel room-nights booked by GRCVB and GRSA combined and continued increases in room-night generation around sports activities.

There is a need for a multipurpose indoor arena that could seat roughly 5,000 spectators. This kind of facility would fill a gap where Wake County currently does not have a sufficient product to host indoor sports like basketball, wrestling and volleyball. A proposed indoor multipurpose arena could be roughly 100,000-150,000 net square feet to satisfy part of the need for indoor sports facilities in the county.

As stated above, the PNC Arena was part of the original enabling legislation. This was a significant investment that has seen thousands of events brought to the county that have benefitted residents and visitors. To remain competitive, the PNC Arena will require capital investment to bring it into the next generation of arena capabilities. With the new owner of the Carolina Hurricane's in place, and the future of the team secured for the near future, the DSP recommends that the PNC Arena explore upgrades and enhancements to include improving the spectator experience, so as to remain competitive as a host for major events such as the NCAA Men's Basketball tournaments and the ability to enhance and expand other uses.

If enhancements and upgrades are committed to, this could also support securing the Carolina Hurricanes for a longer-term deal (15-20 years). The capital investment and commitment from the team should be done in parallel. Without the Carolina Hurricanes, the uses of the PNC Arena will be severely limited.

The interlocal funds have been utilized successfully in the past including investments in Cary, which has built a strong reputation as a sports tourism host location. Opportunities to invest in the development of future sporting facilities and events that have the potential of becoming a room-night generating asset should be explored and encouraged. Recommended requirements for interlocal fund use for sports were detailed in the Sports Priority section.

For all the sports related requests, it is recommended that GRSA provide an advisory role in determining how the proposed project strengthens Wake County's overall position as a sports destination. If it determined that a proposal will not enhance Wake County's ability to attract new sporting events it should not be a candidate for interlocal funding.

Potential Projects Aimed at Arts

In addition, there are opportunities for arts organizations to apply for interlocal funding if the request is related to infrastructure. Arts and culture play an important role in the continued development of Wake County as a destination. Similar, to the discussion in the events section, there is not currently an opportunity for arts organization to apply for interlocal funding for programming. This could be further explored and a consideration be made to open funding for programming. In evaluating the viability of a proposed project, the approach is similar to what has been detailed above and the metrics that are outline below.

JLL recommends that the applicant demonstrate that the proposed investment will generate overnight stays and that there is a mechanism to track results. Requests for investment in an arts institution should include a full feasibility study to validate the ability to drive overnight visitation with a sustainable business plan.

Required Measurement and Metrics

JLL recommends the County implement a standardized measurement system with specific metrics to measure potential impact of proposed projects and to monitor the impact of approved ones. Creating a standard measurement system will reinforce the importance of the County's determined priorities. In addition, the metric expectations should be shared with all applicants, which will further demonstrate transparency in the process and establish stronger tracking needs for each funded program. Guidelines for the initial metrics to include are described in the box on page 139.

These metrics will be critical for applicants to respond to and report on. Like claw back provisions of an incentive program, if an applicant does not measure and deliver the results proposed in their application for interlocal funding, the County should no longer provide funding to that program. Organizations that do not report metrics or consistently do not demonstrate progress towards goals should be penalized or possibly removed, based on the level of violation, during the scoring process. Upon review of the above recommendations, JLL will work with the County to integrate these recommendations into the application process as part of the DSP process.

Interlocal Funding Takeaways

These efforts, especially those accessing interlocal funds, should be executed with the purpose of growing these markets for new overnight stays and extending existing stays to keep their spending in Wake County. Mechanisms should also be in place to applicants to meet minimum requirements, provide new required criteria and track the results of the efforts.

Metrics for Tourism Impact

1. Tracking incremental overnight visitors related to the program's efforts

Increasing overnight visitors is the goal of the DSP. Production of overnight visitors should be the most important metric, and recipients must clearly articulate the projected number of overnight guests resulting from the funded activities.

2. Research

Applicants should be directed to work with GRCVB as centralized research hub to inform applicants of current trends, validate demand and other important information.

If an applicant is applying for a major project, that project must be supported by research from a nationally recognized firm of merit.

3. Projections

All projects should include projections related to the impact on the community and other outputs, including room-nights, direct and indirect spending and employment support where possible. All applicants should be required to work with GRCVB/GRSA, where possible, to validate those projections using tools used by GRCVB, including the Event Impact Calculator.

4. Tracking return on investment

To ensure that the County invests its dollars in projects that are of the highest and best use of existing or potential tourism assets, applicants should be required to track and measure the ROI of the project. JLL recommends that the County utilize a recognized national platform (such as the Destinations International Event Impact Calculator) to determine the broader impact of the funded projects and initiatives.

5. Leveraging flexibility and partners

Applicants should be encouraged to work together on programs that will leverage resources and identify opportunities for partnership or increased flexibility and usage in a facility. This area can be measured by how the funding or resources are extended through collaboration with other partners. An example of this could be a new facility with a primary use related to professional sports, but with the ability to host a variety of events and the applicant providing evidence that resources will be spent on ensuring flexibility for conversion/mixed uses will occur.

6. Ongoing Maintenance and Capital Planning

All funding requests should be accompanied by a maintenance and capital plan that commits to upholding the needed quality standards as outlined in the applicant's request. This is especially important for sports applicants where quality standards must be maintained for tournament play. This must be committed to, with a plan, in the application process.

Impact on the Greater Raleigh Convention and Visitors Bureau

Impact on GRCVB

The Priority Areas included in the DSP suggests initiatives and actions where partners, stakeholders, and organizations involved with nurturing Wake County’s visitor economy can and should be involved because they will have an impact on driving overnight visitation countywide. The DSP priorities are focus areas with the highest potential to cause increased overnight visitation to the county.

The Priority Areas will have both direct and indirect impacts on increasing overnight visitation in one, two, or all of the visitor channels. Those Priority Areas with an indirect impact are more strategic in nature and aimed at strengthening an aspect of the county’s tourism product or the infrastructure (both physical and organizational) that supports a strong and competitive visitor experience. Those with a direct impact are more closely tied with short- and near-term actions that could be taken by GRCVB, destination partners, municipalities, and/or demand generators.

In helping the county to develop the DSP, JLL used its understanding of the current state of Wake County as a travel destination (garnered through the Situational Analysis, feedback from stakeholders, and iterative discussions with GRCVB leadership, partners and staff) and coupled it with expertise in knowing “what works” to make measurable impact to increase overnight visitation. JLL identified the Priority Areas from this analysis and assessment.

The strategies presented for each priority area are not meant to be heavily prescriptive recommendations because JLL knows and believes that the organizations and partners know best how to address the identified needs and strengthen the county’s tourism product. Like a blueprint, the DSP sets the overall direction for Wake County’s destination activities going forward; it will be the County, destination partners, destination assets and overall community’s responsibility to take these recommendations and create implementation plans. JLL will be available for advice and counsel in forming these, but the appropriate County department, destination partner, destination assets, key attractor, or individual organization should lead the implementation plans’ development.

The strategies presented for each priority area are not meant to be heavily prescriptive recommendations because JLL knows and believes that the organizations and partners know best how to address the identified needs and strengthen the county’s tourism product.

Where applicable, the above sections of the DSP have made suggestions for next steps and/or how the relevant party could approach addressing the Priority Area.

The GRCVB Role

As the official and accredited DMO of Raleigh and Wake County, GRCVB is mandated to increase visitor and convention/group business and work in the interest of county and city government, trade, and civic associations and travel suppliers to build visitor traffic to the area. As Wake County implements the DSP, GRCVB will be key in continuing such marketing and working with partners and communities as it has done in the past to tout the strengths of the county as a destination for leisure, meetings, and sports travelers. However, for other priorities, the GRCVB role will be less direct. The organization will act as a catalyst, convener, or resource for best practices or other data and information.

The below table highlights some of the roles or areas in which GRCVB's operations need to change. Roles marked with an asterisk are new or roles in which GRCVB has minimal engagement to date. Icons are used to show GRCVB's main areas of engagement in the role. In addition, a matrix of recommendations follows this section that expands on the eight priorities of the DSP and how GRCVB can support those efforts.

It is important to note that all destination partners, organizations and leadership from across the county will be have a role and responsible implementing parts of the DSP.

While this section seeks to help GRCVB focus on how to begin implementing the DSP, it is important to note that all destination partners, organizations and leadership from across the county (including municipalities and other organizations, and the private sector) will be have a role and responsible implementing parts of the DSP. GRCVB will serve as a convener for many of the priorities and recommendations at the onset of implementation, but all destination partner will need to take action to realize the true potential of the DSP recommendations and meet the

ambitions 2028 visitor goals.

DSP Impacts on GRCVB

Staffing/lead



Coordination



Information Sharing/ Resource



Certification/ Setting protocol
















Advocacy and brand extension



Role	Enhancement/Change	Impact on GRCVB	
Marketing to Leisure Travelers	Enhanced technology platforms to develop/market experiences, not just lists	Investment in research and conversion platforms like Arrivalist	
Marketing to Meetings and Conventions	More focused and prioritized sales effort to increase prospect list.	Work with RCC to tweak booking policy. Get access to Ungerboeck for “read only” status and potential to explore a patch between Simpleview and Ungerboeck	
Marketing to Sports Groups	Coordination among facilities to ensure fields/amenities remain at or above the standard demanded by targeted tournament organizers	Work with County leadership to set protocol for “certifying fields” and maintain certification (like a certified sites list) related to funded projects; develop Sports Event Calculator. Function as the central organization for all tournament sales.	
Support for Events	Capacity to serve as resource when assessing countywide impact of an event	Developing a Festival Impact Calculator; set goals to drive/anticipate overnight visitor increase; build alliances. Work with the event matrix and event liaisons to qualify and support events with overnight visitor potential	

GRCVB roles, continued

Role	Enhancement/Change	Impact on GRCVB	
Interaction with municipalities	Increased engagement and briefing; making the case for why tourism is important and necessity of countywide approach	Support the ongoing implementation of “tourism plans” to ensure continuity and trackable success.	  
Branding the region as a tourist destination	Continuing to brand Wake County as Raleigh, N.C.; create an iconic image/destination	Engage in focused effort to embed the brand promise and foundation throughout the county.	
Interaction with Arts/Culture groups	Increased coordination and engagement; help drive and support creation of icon	Supporting the calendar and experiential vision to bring the arts to the forefront when viable	 
Coordination with Economic Development entities	Continuing to work with EDOs to strengthen the County’s quality of place and helping to make the case for hotel and other amenity development	Build mechanism to support and interface with hotel developments/proposals with ED directors in County. Develop ED communication strategy	 
Advocacy for Tourism Infrastructure Investments*	Use overall vision of the Destination Strategic Plan to garner support for investment in demand generators and tourism infrastructure and weigh in on policies that affect tourism	Provide information and guidance on interlocal funding choices. Support large and small applicants so key principles are contemplated to increase overnight visitation.	 
Technology Infrastructure	Utilize aspects of the DSP to align with technology needs of the future visitor balanced with the safety and security needs within destination placemaking	Provide recommendations for technology infrastructure and potential capital to improve the visitor experience. This could include tools and infrastructure within the internet of things (IoT) to better prepare the destination for emergencies or provide a higher level of engagement with visitors.	  

Recommendations Matrix

Matrix of DSP Recommendations

The following tables represent recommendations contained within each priority for implementation throughout the 10-year duration of the DSP. These recommendations and initiatives support the eight priorities identified during the DSP process. Over the life of the DSP implementation, various partners will need to be involved in these action items to support Wake County's tourism efforts. GRCVB will be involved in many of these initiatives in some way. In addition, GRCVB should utilize these tables to work within the respective departments to create individual action plans that will support the success of implementation. Similarly, County and municipal leadership, as well as partner organizations should work collaboratively with GRCVB, as the DMO that represents Wake County, on areas where their involvement moves these priorities and subsequent recommendations forward.

Meetings and Conventions

Strategy	Tactics	Lead Org	Added detail	GRCVB Role	Timing
Optimize use of the RCC	Build and agree on strategy to focus on Priority One events	GRCVB + RCC		Facilitate final session and present needed detail for City to adopt booking policy	Within 6 months
	Update the RCC booking policy	GRCVB + RCC		Use RCC booking policy as guide when marketing to potential events	Within 6 months
	Set RCC occupancy goal based on Scenario 2	GRCVB + RCC		GRCVB Sales team will set internal goals to help the Center reach that goal	With start of next fiscal year
	Create a prospect tracking system	GRCVB + RCC	Needs buy-in of Joint sales group	Utilize Simpleview to drive prospecting efforts	Within year-1
	Use shared software	GRCVB + RCC	Ungerboeck		Within year-1

Meetings and Conventions, continued

Strategy	Tactics	Lead Org	Added detail	GRCVB Role	Timing
Better leverage other elements of the downtown events campus to strengthen competitiveness of RCC as a meetings venue	Use DECPA more for meetings where possible to increase utilization and revenue potential	GRCVB + RCC	Joint effort to find synergies within uses and increase revenues through meetings uses	Promote and campus experience with groups where the venues could be a fit	Year-2
	Consider relocation of Red Hat – pending Dix decisions – and use space for RCC expansion	City of Raleigh	As Dorothea Dix Park is planning for a similar size music venue, the RCC expansion should be re-explored for this site.	Be a resource and advocate for this move with the City, Dorothea Dix Park consultant, conservancy and others.	Aligned with Dorothea Dix Schedule – beginning in year-1
Increase downtown Raleigh room inventory	Explore the creation of a public-private partnership to facilitate hotel development in downtown Raleigh	City of Raleigh	RCC cannot reach optimization goals without more rooms	Advocate for and be a resource to provide data for this effort.	Advocacy within year-1 Goal to have a desirable hotel deal in place by year-3
Develop/articulate strategy for marketing/selling other meeting districts in the county	Reposition/re-affirm the role of GRCVB Sales team as the leader of the effort to recruit meetings to the County	GRCVB	GRCVB currently does this, but there is an opportunity to be proactive.	Get communities and districts affected to buy in	Within year-1
	Redefine/affirm GRCVB Sales team role in supporting other meeting districts	GRCVB	Include these efforts in the prospect tracking system	Get communities and districts affected to buy in	Within year-2
Develop renovation and expansion plans for RCC	Hire architect to determine space requirements from DSP recommendations	City of Raleigh		Provide data to City and consultant, inform on desired outcomes	Aligned with hotel development within year-3 Expansion goal to break ground by year-6

Sports

Strategy	Tactics	Lead Org	Added detail	GRCVB Role	Timing
Implement Countywide Sports Cluster Model	Work with County leadership on MOU/Contract	GRSA + County Admin	MOU/Contract on interlocal funded projects for sports tourism need to agree that with funding comes participation in this effort	Take lead to initiate model development via County Admin	Within year-2
	Work with existing partner on standards for field/court maintenance	GRSA	Develop baseline criteria based on organizer feedback to be part of the MOU/Contract related to interlocal funded projects	Take lead to create baseline standards and submit to County Admin	Within year-2
Advocate for needed sports developments	Advocate with partners for needed inventory developments	Partners	This could include major projects like PNC Arena and MLS as well as smaller projects throughout the county	GRSA to provide data as support for specific inventory needs i.e. basketball arena	Within year-4
	Support City-owned assets for potential investment	Municipalities + County		For assets like the RCC and PNC arena GRCVB should continue to advocate for capital improvements where needed based on organizer feedback	Within year-3
	Advocate for Multipurpose Indoor Sports Complex	GRSA	A 100-150k square foot multi-use indoor sports complex (including 12-16 courts and the ability to seat 4,000-5,000 spectators Arena style) to host youth and amateur events and tournaments and add to the year-round inventory of fields and courts used for basketball, volleyball, wrestling, etc.	Advocate for, and potentially provide data to a developer, to create an opportunity for this development	Within year-5

Key Attractors

Strategy	Tactics	Lead Org	Added detail	GRCVB Role	Timing
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Collaboratively identify how each of the four, key attractor museums can grow demonstratively more compelling	Form a group to meet on linking assets via development features	GRCVB	Consider shared or linked physical development features	GRCVB is the convener to bring this group together on the topic	Within year-2
	Form a group to meet on developing a proactive strategy to chase and deliver blockbuster exhibits	GRCVB	Build a system to collaboratively identify, attract, and support blockbuster exhibitions	GRCVB is the initial convener to bring this group together on the topic	Within year-2
	Host first blockbuster exhibit out of this effort	Partners		Support marketing and messaging	Within year-3
	Work with attractors to include experiential programming	Partners	Provide data and support to elevate museum experiences	GRCVB is initial convener in this effort to bring museums together on this topic	Within year-4
Leverage Dorothea Dix Park as a future key attractor to increase overnight visitation	Begin a discussion to include an iconic feature as part of the site's master plan	City of Raleigh	Continue dialogue with designers	GRCVB to provide data, research and support for development at Dorothea Dix (designate liaison)	Aligned with Dorothea Dix Park timing – dialogue to continue within six months
	Consider relocation of Red Hat – pending Dix decisions – and use space for RCC expansion	City of Raleigh	As Dorothea Dix Park is planning for a similar size music venue, the RCC expansion should be re-explored for this site.	Be a resource and advocate for this move with the City, Dorothea Dix Park consultant, conservancy and others.	Aligned with Dorothea Dix Park timing
	Include Dix in discussion to better link districts in and around downtown Raleigh.	City of Raleigh			Within year-1

Individual Leisure

Strategy	Tactics	Lead Org	Added detail	GRCVB Role	Timing
Continue to create, curate and develop unique, experiences to drive overnight stays to provide more interconnected and user ready experiences for the Leisure traveler	Solidify relationship with People-First program. Work with People-First to create pathway to participation	GRCVB	To move this priority forward GRCVB will need to take on the role of coordinator and convener. Work with municipalities, and the Passionate Minds group to scale the offerings up for individual, customized tours with local artisans and personalities.	Work with partners to create this inventory of experiences by being the curator and coordinator. . Additionally, GRCVB departments will be leveraged to scale inventory and functionality for seamless booking and execution.	Within year-1 Within year-3
	Work with partners to leverage Wake County's unique culinary and retail options	GRCVB		Work with Passionate Minds to further these experiences	Within year-4

Events

Strategy	Tactics	Lead Org	Added detail	GRCVB Role	Timing
Create a process with criteria by which events would receive funding via public dollars and in doing so create a transparent platform	Form a group to meet on finalizing event funding criteria	GRCVB	Determine final criteria and weights from sample included in DSP Consider opening funding via interlocal Consider site locations to alleviate congestion and lessen potential negative impacts to residents	GRCVB is the convener to bring this group together on the topic	Within year-2
	Identify opportunities for a signature event	GRCVB + County + Partners	Work with organizers and the County to determine interest in investment in a signature event	GRCVB is the initial convener to bring this group together on the topic and lead planning efforts with an organizer if there is support	Within year-5
	Utilize the Event Impact Calculator to measure ROI for events	GRCVB	Work with County/municipalities to create MOU/Contract for events and event organizers interested in funding to measure all events	GRCVB to be the source for measurement and reporting, but will need source data from events. Events will be required to utilize criteria determined and provide data to GRCVB	Within year-2
Implement the technology and support that is needed to be the calendar for all events in the County	Begin a discussion take the calendar that exists today and expand it to be even more comprehensive	GRCVB	Vet technology and human resources needed	GRCVB to drive the process to implement technology and run the calendar	Within year-3
		GRCVB	Work with organizers and partners to input data		

Destination Development

Strategy	Tactics	Lead Org	Added detail	GRCVB Role	Timing
Encourage repurposing or redeveloping key parcels throughout the county to serve the needs of travelers and concentrate destination assets around demand drivers	Work with development community to inform on visitor trends for asset development	Partners	Build relationships with the development community to begin conversations around destination development	GRCVB will need to designate a liaison in this space to build these relationships	Within year-5
	Be engaged in development plans for the county to ensure the needs of the tourism industry are considered	Partners	Ensure the tourism community is engaged in future planning conversations to include tourism development needs	GRCVB needs to communicate Wake County's tourism vision, much like the RTA advocates for infrastructure that will support their partners	Within year-5

Regional Demand Drivers

Strategy	Tactics	Lead Org	Added detail	GRCVB Role	Timing
Strengthen relationships with regional demand drivers and leverage their power to support and grow Wake County's gateway brand	Expand relationships with the drivers	Partners	Develop a mechanism to stay up-to-date on growth plans, changes, or other developments that would enhance their value as a tourism driver	GRCVB needs to stay informed on updates throughout the region that affects tourism in Wake County positively or negatively	Within year-4
Strengthen the county's support service for international travelers	Create venues for foreign exchange and other services	Partners	Develop quarterly or annual sessions to compare activity and align campaigns of regional significance	GRCVB to work with partners on international visitor needs and create signage and other visitor services needs as demand increases	Within year-5
	Create multi-language signage and travelers' aids, etc.	GRCVB + Partners			

Quality of Place

Strategy	Tactics	Lead Org	Added detail	GRCVB Role	Timing
Sew a thread of destination place-making within all areas of Wake County's future by identifying manifestations of the County's strong quality of place as a means to market the county to visitors	Culturize the Passionate Minds Brand	GRCVB	Work with partners and existing Passionate Minds to extend the brand platform. The municipalities have opportunities to participate and engage, but may not be sure how to do so	GRCVB to create targets for brand extension with Passionate Minds	Within year-3
	Develop localized brand engagement opportunities for municipalities	GRCVB		GRCVB to create targets to surface brand engagements in municipalities. This could include opportunities through the People-First platform and Key Attractors as well.	Within year-4
Continue to develop amenities and attractions for new local residents (the growing population) that will also be of interest to the visitor	Support and advocate for enhancements to the greenway and park system	Partners	Work with respective leaders to inform on visitor trends and needs	GRCVB to work with partners for visitor considerations when greenways and parks enhancements are being considered	Within year-5
	Form think tank for enhancements to the cultural arts and entertainment scene	GRCVB	Work with partners and arts leaders to form a group to review arts projects and enhancements	GRCVB is the initial convener to bring this group together on the topic and lead planning efforts	Within year-5
	Support enhancements to the county's transportation product, especially in the transportation arena, with any eye toward better servicing the visitor	RTA	Work with partners to understand current initiatives	Participate in work groups and committees to further the visitor experience when it comes to transportation within the county	Within year-5

Quality of Place, continued

Strategy	Tactics	Lead Org	Added detail	GRCVB Role	Timing
Establish a landmark fund	Enable inclusion of iconic features at attractions and around the county that will further embed and solidify Wake County's quality of place/destination brand	County	Work with county and partners to consider opening the interlocal model to set aside funds for such a project	GRCVB to be the initial convener on the topic and facilitate discussions for support and potential	Within year-5
Develop a One-of-a-Kind Attraction	Form working group on high profile attraction/activation	GRCVB	Encourage Creative Art and High-Profile Activations	GRCVB to be the initial convener on the topic and facilitate discussions for support and potential	Within year-5

Conclusion

The inclusive and broad-based approach that was used to develop the Destination Strategic Plan for Wake County has produced a variety of recommendations and initiatives. These will transform Wake County over the next ten years to an even more successful destination for visitors, as well as a great place to live and work. The eight areas of focus all have the potential to increase visitor activities across many markets. The DSP is organized to create opportunities for key partners throughout the county to take leading and supporting roles in ensuring successful implementation.

Implementing this plan will take coordination at all levels and from many organizations to be successful. The level of interest that was demonstrated in the planning process is reassuring when speculating on the level of success that will be obtained in bringing the recommendations to life. JLL has been honored to be a part of this process.

Appendix

Appendix

- A. Definitions for Event Matrix
- B. Stakeholder engagement list of participants
- C. Primary DSP research
 - a. Stakeholder survey results
 - b. Meeting planner survey results
 - c. Community survey results
- D. Map of Highest & Best Use – DSP Priorities

Appendix A:

Definitions for the events matrix.

1. **Tourism Promotion Impact:** Will it promote a positive image for Wake County? Will it attract tourists, build new audiences and encourage tourism expansion? Will it increase awareness of the area's amenities, history, facilities and/or natural environment?

NOTE: an overnight visitor is defined as "one person on a trip away from home overnight, in paid accommodations for business or pleasure."

2. **Benefit to the Destination:** How will this project benefit the destination?
3. **Innovation:** Is the event different and unique? Does it bring something new to the county?
4. **Evidence of Partnership:** Is the applicant leveraging other local Wake County partners?
5. **Organizational Structure & Management Capability:** How has the applicant demonstrated an ability to successfully complete the project through effective business practices in the areas of finance, administration, marketing and production? What are the administrative credentials of paid or volunteer staff or individuals? What is the experience with key management personnel in the execution of this type of activity? Does the project and organizer have the support in place already to acquire permits?
6. **Economic Impact:** In addition to quantifying the number of tourists and overnight stays projected, proposers should detail the impact on Wake County's economy. Projects should include levels of direct spending anticipated due to this project and how that spending will benefit the local economy. Proposers should also detail the time of year during which this project will take place and how it will impact shoulder periods.
7. **Quality of Research:** Research must be conducted in a manner that provides conclusive evidence of the event's acceptance with targeted markets. Methodology must be understandable and deemed effective.
8. **Suitable Target Market:** Who are the target markets? Are they a fit with the research that exists on Wake County's current visitors today?
9. **Comprehensive Marketing Approach:** Proposals should include detailed marketing plan as well as the approach to advertising, PR and social media. Projects should also include an evaluation plan of the marketing efforts, to include attendee satisfaction.
10. **Previous Replacement Funding:** Do you have a history of successful use of funding? Is there a reliance on annual funding from the same sources? Does the project anticipate using these funds to replace existing funds? You may apply for and receive funds in subsequent years; however, continuity of funding is not guaranteed. Please submit a detailed realistic budget.
11. **Evaluation/Measurement Plan:** Quantifiable results are an essential component of this process. All recipients must determine the effectiveness of the project for which they receive funding. Please define what methodologies will be used to measure and evaluate the effectiveness of the project as it is vital to securing this funding.
12. **Scale of Project:** Is the project of a scale suitable and will it elevate the Wake County area? Has something of this proposed size and scale previously occurred in our area? Please provide applicable comparisons and how the comparable project is of a scale to draw visitors to Wake County.

13. Room-Nights: What are the hotel room-nights projected out of your event?
14. Application Quality and Clarity: Application should be clear, neat and comprehensive in terms of meeting all application requirements.

The core metrics of evaluation are:

- a. Room-Nights Generated,
- b. Direct Visitor Spending – Economic Impact, and
- c. Attendee Satisfaction.

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