

Destination 2028

DESTINATION STRATEGIC PLAN PRIORITY

5. Individual Leisure



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.

**Curate
&
Track**

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.

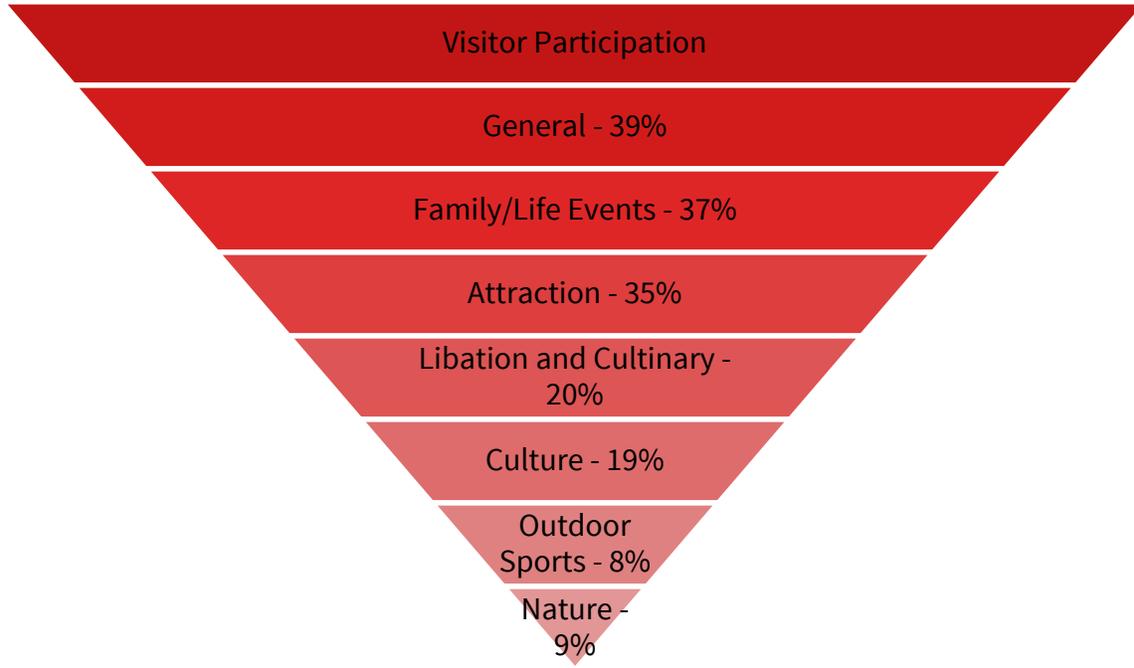
Based on the research, GRCVB should work closely with its partners to develop and curate experiences of interest to these visitors. JLL's research and experience shows that today's leisure travelers are more interested in unique experiences during their vacations than previous generations of travelers. 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:



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

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.