

What is the DSP?

Given the ever increasing competition from other destinations, leaders in Wake County recognized that they cannot allow this destination to become stagnant.

With a goal of welcoming 21.7 million total visitors by 2028, the **Wake County Destination Strategic Plan: A 10-Year Tourism Plan** (DSP) identifies actions that destination partners can take to strengthen Wake County’s competitiveness as a tourist destination and measurably impact overnight visitation in the county.

The DSP serves as a blueprint for the county’s destination development and demonstrates how it can directly increase overnight visitation. The Greater Raleigh Convention and Visitors Bureau (GRCVB) is serving as a catalyst to bring together the County, municipalities, and destination partners around collective and individual roles. The process to build the DSP has been collaborative and iterative; the plan incorporates feedback from more than 1,800 stakeholders.

DSP Priorities

At the center of the DSP are eight priority 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 and merely need 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, the GRCVB, the municipalities and destination partners to adopt new paradigms and consider substantial change to how the community can “sell” the destination.

Some of the recommendations offered in the DSP are highly prescriptive. Others are meant to be starting points

DSP Priorities

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

for discussion, recognizing that the destination partners in the county are the experts in determining the best path. The recommendations are highly achievable because they were built within this spirit of collaboration.

DSP Strategy for Raleigh

In addition to the countywide priorities, the DSP also offers individual plans for each municipality to identify a path for participation in Wake County’s tourism future and take steps individually to strengthen their own tourism assets. **Without the active participation of all of Wake County’s municipalities, the implementation of the plan will not be as successful.**

Given its many assets, size, and established tourism economy, the City of Raleigh will be involved in all of the priorities set forth in the plan. As the City joins in the efforts to bring the DSP to fruition, JLL recommends that Raleigh focus its initial attention on those assets that are already key drivers for visitation to the area and continue to leverage the many Passionate Minds and distinctive characteristics of the city.

To fully leverage the DSP, Raleigh should become actively involved in the priorities around Key Attractors, Meetings and Conventions, Events and Quality of Place. By concentrating on these areas of strength, Raleigh



Key Takeaway for Raleigh

- Make short- and long-term investments in the RCC to grow impact, including hotel inventory needs
- Make investments in professional sports demand generators as long-term team support is established
- Work with the GRCVB to leverage existing events with the potential to be visitor facing
- Leverage Passionate Minds and retail and dining experiences to extend the area brand

can help drive countywide efforts to increase meetings, business and leisure travel and bring to life the “smart” and experiential brand promise of Greater Raleigh, N.C.

Key Assets

The Asset Inventory and Situational Analysis suggests that Raleigh has a number of existing assets to draw overnight visitors to the area. In addition to the Raleigh Convention Center (RCC) for meetings and conventions, the Key Attractor museums and the facilities to cater to professional sports, the city has a vibrant downtown and is the home of Dix Park and a number of colleges and universities.

Downtown Raleigh

The diversity of offerings, level of passion and commitment to community is something rarely put together organically and successfully. 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 labels “Quality of Place.” Raleigh has a strong Quality of Place because of the economic opportunities and higher education institutions that exist and the diversity those two aspects have brought to the community.

What Raleigh has to offer in terms of the 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, downtown Raleigh has what it takes to elevate their food scene and become a destination.

Shopping & Retail

Shopping and retail experiences are another of the main reasons people visit Raleigh. The existing retail experiences include the expansive North Hills mixed-use development in Raleigh’s Midtown, local retailers in downtown Raleigh, Cameron Village and Crabtree Valley Mall.

The GRCVB’s collection of Passionate Minds includes the retailers of Stitch (Holly Aiken) and DECO Raleigh (Pam Blondin). These local makers have created a vibrant, locally driven shopping experience in the city. These offerings



Potential redevelopment of Raleigh’s government campus

continue to create the critical mass around which a leisure traveler can plan a vacation. Retail alone will potentially drive new overnight stays in the market as the offerings continue to grow and diversify.

Key Attractors and Destinations

As the state capitol, Raleigh is home to several demand drivers. Similar to the Quality of Place organically built in downtown, these assets—like the three state museums, Dix Park, PNC Arena, the Duke Energy Center for the Performing Arts and the RCC—not only drive visitation to Raleigh, but also contribute to the area’s “livability” and resident appeal.

Events

Most of the events in the region that currently attract measurable levels of overnight visitors (e.g., IBMA’s World of Bluegrass week, Brewgaloo, Hopscotch Music Festival and the North Carolina State Fair) are held in Raleigh. 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. While the current impact of these events is strong, there is opportunity to grow each further, along with nurturing smaller events that have a similar potential. Pages 3-4 provide more details and examples of Raleigh’s rich tapestry of tourism assets.

City of Raleigh Interaction with Priorities

Below are destination assets identified in the Situational Analysis with the potential to drive overnight visitation in one or several of the priorities.

	M&C	Sports	Events	Key Attractors	Individual Leisure	Destination Development	Regional Demand Drivers	Quality of Place
Raleigh Convention Center	X	X						
Duke Energy Center for the Performing Arts	X				X			
NC Museum of Natural Sciences				X	X			X
NC Museum of History				X	X			X
NC Museum of Art				X	X			X
Dix Park			X	X	X			X
PNC Arena		X	X					X
State Fairgrounds			X			X		
NC State University							X	X
Marbles Kids Museum				X	X			X
Downtown Raleigh	X		X		X			X
North Hills					X			X
Crabtree Valley Mall					X			X
Airport Meeting District	X							
North Hills Meeting District	X							
Downtown Festivals/ Events			X		X			X



Events at North Hills

Culinary Assets

Raleigh has made a name for itself on the culinary scene. Among the many brand-extension establishments and demand generators are:

AC Restaurants

As home to celebrity chef, Ashley Christiansen, the opportunity exists for Raleigh to deliver a distinguished, high-quality food and beverage experience in the downtown market. Chef Christiansen's AC Restaurants include Beasley's Chicken + Honey, Death & Taxes, Chuck's, Poole's Diner and Fox Liquor Bar. All of these offer a distinct and unique experience with elevated food and beverage offerings. Christiansen's suite of culinary offerings also includes AC Events which has a private event space at the Bridge Club, as well as private catering. Chef Christiansen has won the James Beard Award Best Chef Southeast in 2014; in 2017, she received Eater's the Best Chef in the Nation award. With this level of celebrity talent, Raleigh has the opportunity to elevate the other notable restaurants and eateries in the community.

Bida Manda & Brewery Bhavana

Unique and local are the themes of the Individual Leisure priority. It would be challenging to find a more unique offering than a Laotian restaurant with local owners in the Southeastern US. Bida Manda opened in 2012 under the brother-sister team Vanvisa and Vansana Nolintha. Their story is a version of the American Dream, as children arriving in the United States growing a successful, entrepreneurial business. Their mission is to bring people together to celebrate diverse food and people with a heartwarming side of family togetherness. Bida Manda's commitment to serving traditional Laotian food using local ingredients is only part of what makes them unique. Their commitment to community only sets them apart further. Bida Manda has a family-like culture for workers: collecting coats for the refugees and their families in winter, providing English lessons as a staff and raising money when work mates/team members encounter issues.

In addition to Bida Manda, the pair opened Brewery Bhavana with head brewer and Co-Founder Patrick Woodsen in 2017. Brewery Bhavana quickly became a notable spot, earning a spot on *Forbes* list of coolest places to eat in the world in 2017. Taking their commitment to "unique" to the next level, Brewery Bhavana is equal parts beer-lovers dream, book-nerd safe spot and taste-bud heaven. With every aesthetic detail thought through (including an in-house flower shop), Brewery Bhavana continues to elevate Raleigh's downtown food scene.

Gallo Pelon Mezcaleria

Cited by *Food & Wine Magazine* as North Carolina's first mezcal-centric bar, Gallo Pelon Mezcaleria extends the theme of unique and local by being a "community-driven bar that honors the artistry of traditional mezcal and craft cocktails as a whole," offering an award-winning list of mezcals and more. Mezcal is another establishment not often seen in the Southeastern US; with a passion for sharing experiences, the Gallo Pelon Mezcaleria has created a space for something new.

Hibernian Restaurant & Pub/Raleigh Beer Garden

Slightly more common in other destinations, but with its own twist, is the Hibernian Beer Garden, an authentic Irish pub by founder Niall Hanley. Hanley's commitment to opening a pub that would attract people from all walks of life to share in an experience Raleigh has made Hibernian a staple of the Raleigh restaurant scene. Hanley is also a member of the GRCVB's Passionate Minds, and his commitment to representing the community through hospitality, food and beverage offerings makes it unique and successful.

In addition to the Hibernian Restaurant & Pub, Hanley recently opened the Raleigh Beer Garden which features dozens of local beers and currently boasts the world's largest selection of draft beer. The Raleigh Beer Garden has become a loved spot in the community and is now leading the area's budding beer tourism industry.

Garland

Another of Raleigh's James Beard nominated chefs, Cheetie Kumar, opened Garland as her "passion project." Bringing together local seasonal ingredients to plates inspired by Indian and Asian cuisine. Garland offers unique foods in a comfortable setting driven by passion for differentiation and experience. Sandwiched between a music venue and a members-only bar/arcade/live show combo, this culinary comfort spot feels right at home to Kumar, one of GRCVB's Passionate Minds and a professional rock guitarist.

The combination of chef, creator and artist is on display at this three-level establishment (Neptune's Parlor, Garland and Kings). Kumar embodies and has brought to life the downtown Raleigh community in her spaces.

Raleigh Priorities

As noted, Raleigh will be involved in all eight priority focus areas. However, in the interest of focus and concentrating scarce staff and financial resources, JLL suggests that Raleigh focus its initial attention in carrying out the DSP in five areas:

- Strengthening and optimizing the RCC. This will be accomplished by initiating the revised booking strategy and planning for needed renovations and expansion;
- Advocating and supporting the development of more full-service hotel room supply in close proximity to the RCC;
- Supporting efforts of the Key Attractor museums in establishing a collaborative program to recruit blockbuster exhibits, including solicitation of interlocal funding;
- Encouraging and advocating for the development at Dix Park to be bold, differentiated and planned with an eye toward visitor facing uses, as well as local needs and amenities; and
- Continuing to support efforts to welcome and grow professional sports, including support for investments at venues used by professional teams.

Additionally, the City of Raleigh should continue to work with the meetings and conventions sales team at the GRCVB to strategize ways to strengthen the other meetings clusters in the city, outside of the downtown meeting campus anchored by the RCC.

Lastly the City should continue to work with GRCVB marketing efforts to drive visitation to the entire county and utilize the existing calendar of events and website database tools. It could also work within the countywide materials to market its Quality of Place amenities separately to travelers.



Nature Research Center

Engagement with GRCVB

The DSP calls upon the GRCVB to take on the role of convener to drive action around the different priority areas, as well as to continue its role as the county's destination marketing organization (DMO).

One of the key premises of the DSP is that Wake County will grow and be seen as a stronger destination if the County and the communities in the destination work together around a set of strategic priorities, while the municipalities, key drivers, and destination assets continue to work individually in pursuit of their specific tourism goals.

To this end, the checklist on pages 6-7 have been developed to guide Raleigh's engagement with the GRCVB.

DSP Engagement Checklist

The DSP provides a blueprint for the County to attain its visitation goals and take collective action to measurably impact visitation along the priority areas. Below are ways in which Raleigh can engage to help strengthen Wake County's tourism product and help extend its brand as a destination.

Importance of Destination Building

As noted above, the GRCVB will act as a convener to drive action around the different priority areas of the DSP, as well as to serve as a resource to help the individual partners engage in activity. The GRCVB will continue to strengthen outreach efforts with the individual municipalities. As initiatives to support the DSP get underway, the GRCVB will also look to the municipalities to report progress and identify ways destination partners can work more closely together around the priorities.

- Identify a liaison from the City to work with the GRCVB on progress by City Departments towards the applicable priorities
- On a regular basis, brief the GRCVB on progress and alert them to areas where help is needed
- Support efforts to align interlocal funding with the destination development goals of the DSP

Leveraging the Raleigh, N.C. brand promise

All destinations struggle with distinguishing themselves to external audiences while also touting what makes their individual communities unique. As the DMO for Wake County, the GRCVB is entrusted with the job of branding Wake County as a place for visitors. Through the **Destination 2028** initiative, the GRCVB will continue marketing and other initiatives to keep Wake County at the forefront of travelers' minds.

- Utilize the priorities of the DSP to identify areas where Raleigh can further elevate its destination profile
- Engage with the GRCVB to provide opportunities for promotion within Raleigh

Calendar

The DSP envisions creating one, inclusive centralized calendar for visitor-facing events in the county, so there is one place where the information can be found. The GRCVB will take the lead on implementing this. The countywide calendar will also be beneficial to encourage spacing between major events (if possible).

- Continue to send event information to the GRCVB to be entered into the calendar
- Encourage local partners to share information with the GRCVB
- Link to or share the centralized calendar on the City and partner sites

Metrics

As the world becomes more data driven and questions over resource allocation arise, the ability to provide an objective and standardized way to quantify the return on investment of initiatives within **Destination 2028** will be critical. The DSP recommends using tourism industry certified metrics to measure the impact of the initiatives and communicate consistent results to stakeholders.

- Use the Destinations International Event Impact Calculator (EIC) (through the GRCVB) to forecast the impact of events, meetings and conventions and sports events
- Share visitor data, where possible, for targeted industry research and analysis

Website

With more than 2.48 million sessions annually, visitRaleigh.com was built to provide a one-stop place for potential travelers to Wake County to learn more about and decide to visit the area. The site is strong because of the timely, deep and accurate content displayed on it.

- Use the current platform to keep information about visitor-facing events in Raleigh fresh and current
- Use website visitor data from visitRaleigh.com to adjust content or messaging
- Enable links or patches, where possible, to enable easy transactions and movement between sites

People-First

People-First Tourism allows local experts and personalities to add to the experience of visiting Wake County and is a way for all communities to be engaged to attract more leisure tourists to the market. The Passionate Minds will be the basis upon which the "inventory" of experiences might be grounded. If built out properly, the initiative should scale to have a measurable impact on Wake County's overnight visitation.

- Consider engaging others in the community to help identify potential People-First opportunities
- Send ideas of People-First opportunities to explore to the GRCVB

Events

Events— either blockbuster or signature events unique or authentic to Wake County—are a cornerstone of the DSP. Such events will have the potential to attract increasing numbers of overnight visitors. As noted, the majority of events at a current scale to attract overnight visitors are in Raleigh. The key to the successful implementation of this priority in a way that balances the scale of the events with the impact on residents will be a standardized set of criteria to assess the probable impact on overnight visitation and a uniform way to measure impact.

- Continue to work with the GRCVB to review the events matrix and identify existing events with the potential to grow over time to have a more overnight visitor-facing profile
- Consider enhancements to areas in the city’s core so that they are more “event” friendly
- Once events with the potential to draw overnight visitors are identified, work with the GRCVB to measure the potential impact of that event
- Submit event data to be included in the EIC (see metrics section)

Hotel Development

As is the case of fast growing communities, land-use planning becomes important to ensure that tracts of land are available to serve tourism destination development. To this end the GRCVB will be building a mechanism to engage with the local development community to keep potential destination developments at the forefront.

Additionally, as illustrated in the discussion around supporting the RCC within the DSP, there is a need for more hotel inventory in close proximity to the Center.

- Engage in the working group with developers around the pipeline properties, as well as considering other development (including a full service hotel)
- Launch a task force or committee to focus discussion and provide suggestions for implementing a public private effort led by the City of Raleigh to encourage the development of more downtown hotels
- Include planning for tourism product or destination development in the city’s long-term land-use planning

Youth, Amateur and Professional Sports

To build on the County’s brand as a prime venue for youth and amateur sports, the DSP suggests the creation of a countywide sports complex as part of **Destination 2028**. The complex will be a connected network of sports facilities and venues. The GRSA will take the lead on coordinating efforts to market and host events at the facilities and venues.

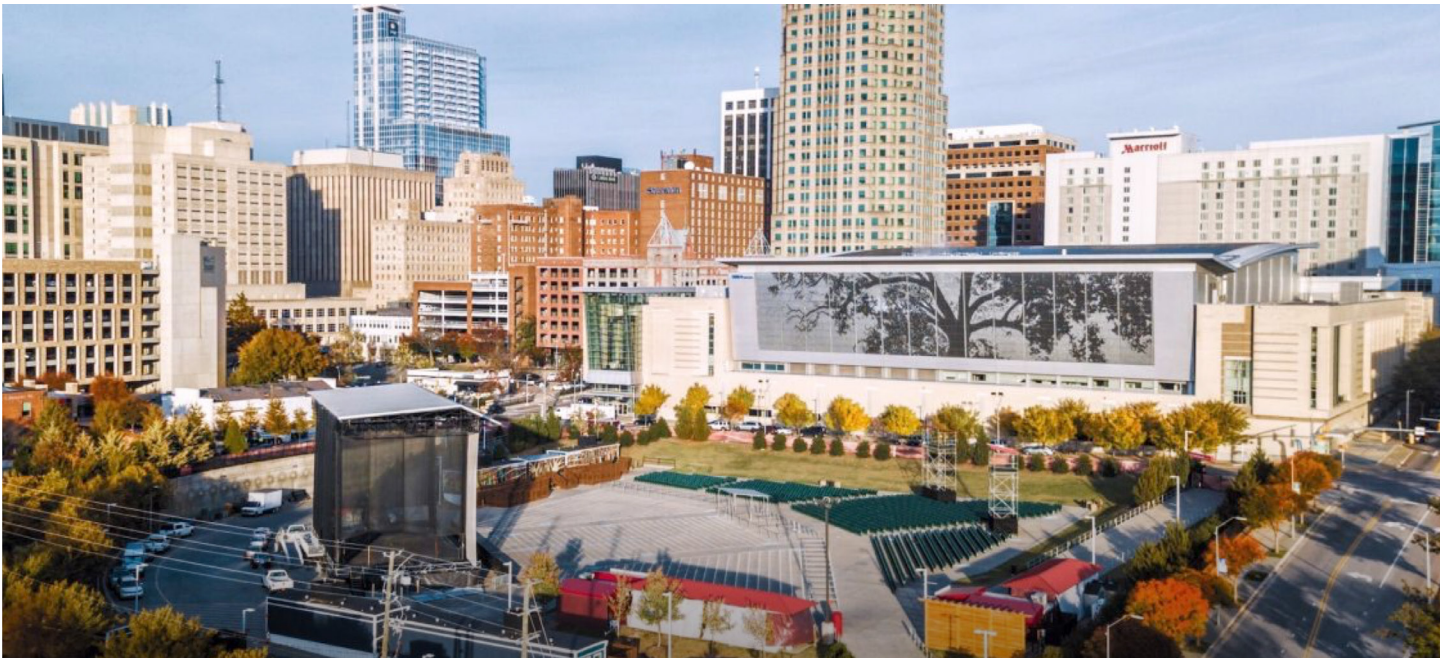
Additionally, the county—and Raleigh in particular—has a strong basis upon which to build the presence of professional sports. While such investments and attraction initiatives will fall into the Destination Development priority, there is also opportunity to leverage these investments to serve the youth and amateur market.

- Engage with GRSA to include all applicable facilities or venues within the countywide sports complex
- Consider expanding or making improvements to other facilities and venues so they meet the criteria for inclusion in the countywide sports complex model
- Continue to support efforts by professional sports teams to locate, remain and expand in Raleigh

Meetings and Conventions

The 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. In addition to the recommendations in the DSP related to the Convention Center, Raleigh should work with the GRCVB to strengthen the other existing meeting districts in the city to attract overnight visitors.

- Work with the GRCVB to implement the RCC optimization plan and new bookings policy
- Support the development of more downtown hotels
- Vet the opportunity for other full-service hotels outside the downtown core and established meeting districts with developers and meeting planners



Autumn Skyline

What's Next?

Engagement by all of the municipalities and destination partners around the priority areas will be crucial for the success of **Destination 2028** and Wake County's ability to reach its visitation goals.

There are several ways Raleigh should engage with the GRCVB and destination partners throughout Wake County to implement the DSP—individually to strengthen the city's tourism product and better connect it to the area AND collaboratively around the priorities.

As noted above, Raleigh should designate a point of contact to directly liaise with the GRCVB on all elements of the DSP. The city should ensure that existing committees and working groups with visitor-facing missions/clients be engaged in the effort. Raleigh's tourism plan should roll up into the DSP's priorities and map how the city will be engaged in **Destination 2028**.

As the initial priority work gets underway, Raleigh should consider creating additional tourism assets that have or may have the potential to drive overnight visitors.

Action Steps

As a partner in tourism, below are potential action items that the City of Raleigh should undertake on a regular basis.

- Hold quarterly meetings with GRCVB leadership beginning in January 2019
- Participate in and distribute stakeholder/industry partner surveys by the GRCVB (potentially annually)
- Participate in and distribute the countywide resident survey (potentially biannually)
- Participate in an annual business planning process with the GRCVB
- Follow recommendations related to the RCC and Public-Private hotel development to support the RCC's needs
- Engage with the interlocal process to submit for RCC-related capital plans