DestinationNEXT Workshop

Chapel Hill/Orange County Visitors Bureau

January 31, 2024

Agenda

Time	Agenda Items
8:00 a.m.	**Opening Remarks** • Welcome • Introductions
8:15 a.m.	**2023 Futures Study**
8:45 a.m.	**DestinationNEXT Assessment Results**
9:30 a.m.	**Breakout Group Discussions on Key Issues** • Report out to Plenary
10:00 a.m.	**Next Steps & Adjourn**

2023 Futures Study

Global Advisory Group

Jacqueline Mora	**Ministry of Tourism (MITUR), Dominican Republic (Vice Minister)**
Alejandra Zúñiga	CEO, Visit Puerto Varas CVB, Chile
David Hidalgo	President, Sinergize Meetings
Fernando Fondevila	CEO, Promtur Panama, Panama
Gilberto Salcedo	Vice Minister, Tourism, ProColombia, Colombia
Gustavo Stauffer	CEO, Guadalajara CVB, Mexico
Julián Franco	Secretary of Tourism, Valle del Cauca State, Cali, Colombia
María José Abuabara	Executive Director of Tourism, USA, ProColombia
Mauricio Magdaleno	Managing Director, Clúster de Turismo de Nuevo León, Mexico
Nancy Mejía	Managing Director, National Chamber of Tourism Guatemala, Guatemala
Reizel Vilorio	Vice Minister, Instituto Hondureño de Turismo, Honduras
Silvana Biagiotti	Chairman of the Board, Latin America Association of CVBs, Latam
Toni Sando	CEO, Sao Paulo CVB, President, UNEDESTINOS (Brazilian Assn of CVBS), Brasil
Vaniza Schuler	Director, Business Events, EMBRATUR, Brasil

★ **Canada**

Scott Beck	**Destination Toronto**
Chantal Sturk-Nadeau	Destination Canada Business Events
Leslie Bruce	Banff & Lake Louise Tourism
Michael Crockett	Ottawa Tourism
Paul Nursey	Destination Greater Victoria
Ross Jefferson	Discover Halifax
Royce Chwin	Destination Vancouver
Stephanie Clovechok	Tourism Saskatoon
Yves Lalumiere	Tourisme Montreal

★ **USA**

Chris Thompson	**Brand USA**
Brad Dean	Discover Puerto Rico
Casandra Matej	Visit Orlando
Craig Davis	Visit Dallas
Dave Lorenz	Pure Michigan
Gina Trigila	Los Angeles Tourism
Jeff Miller	Travel Portland
Jill Delaney	Discover Albany
Jennifer Chun	Hawaii Tourism
Leonard Hoops	Visit Indy
Martha Sheridan	Greater Boston CVB
Melyssa Reeves	Vacaville
Sara Toliver	Visit Ogden
Victoria Isley	Asheville CVB

★ **Europe, Middle East, Africa**

Bettina Reventlow-Mourie	**Wonderful Copenhagen**		
Caroline Strand	Visit Stockholm	**Petra Stusek**	Ljubljana, Slovenia
Corne Koch	Capetown DMO	**Rory Archibald**	VisitScotland
Jos Vranken	Holland Tourism	**Sam Johnston**	Convention Bureaux of Ireland
Matthias Schultz	German Convention Bureau		
Miha Kovačič	Slovenian Convention Bureau		London & Partners
Nelly Mukazayire	Rawanda Convention Bureau	**Simone McCaugherty**	
Noa Sapir	Tel Aviv Convention Bureau	**Yrjötapio Kivisaari**	Visit Oulu
Paul Kelly	Fáilte Ireland	**Kathryn Davis**	Visit West (Bristol & Bath, UK)
Paul Mockler	Fáilte Ireland	**Patricia Yates**	Visit Britain / Visit England
Peter de Wilde	VisitFlanders		

★ **Asia Pacific**

Dr. Edward Koh	**Singapore Tourism Board**
Lyn Lewis-Smith	**BeSydney**
Amelia Roziman	Business Events Sarawak (Malaysia)
Julia Swanson	Melbourne Convention Bureau
Karen Bolinger	Gold Coast CVB
Leonie Ashford	Tourism New Zealand Business Events
Shin Osuka	Japan Travel & Tourism Association

DESTINATIONS INTERNATIONAL   MMGY NextFactor

Market Segment

Leisure Travel only
(group tour and independent)
13%

Business Events only
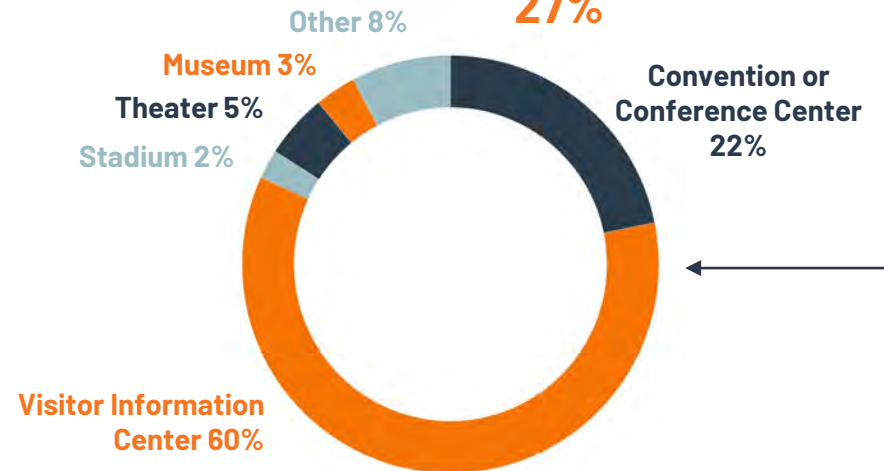(meetings, incentives, conventions, exhibitions)
23%

Both Market Segments
64%
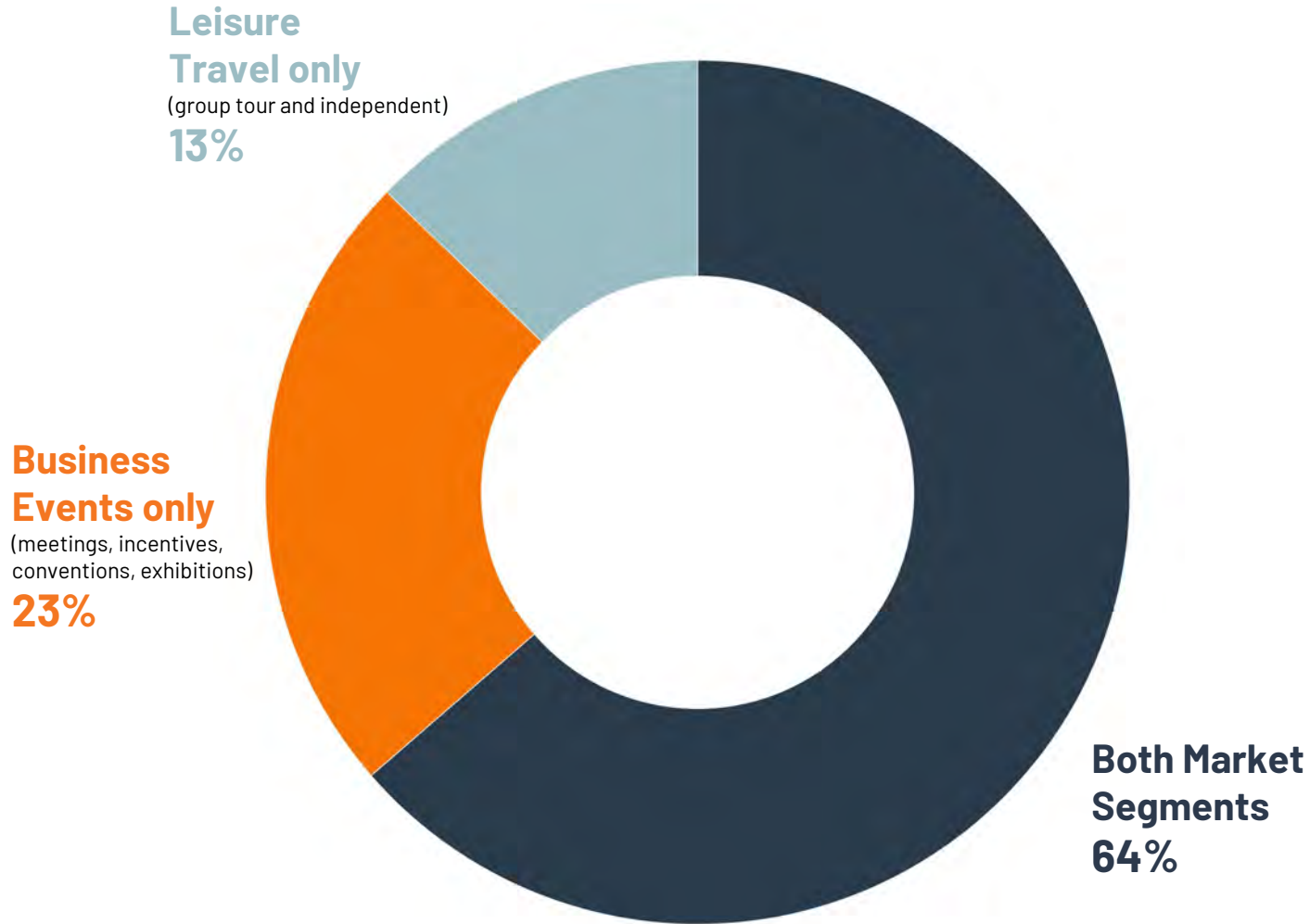
Facility Management

Responsible for the management (non-selling) and operation of a community-based venue:

No
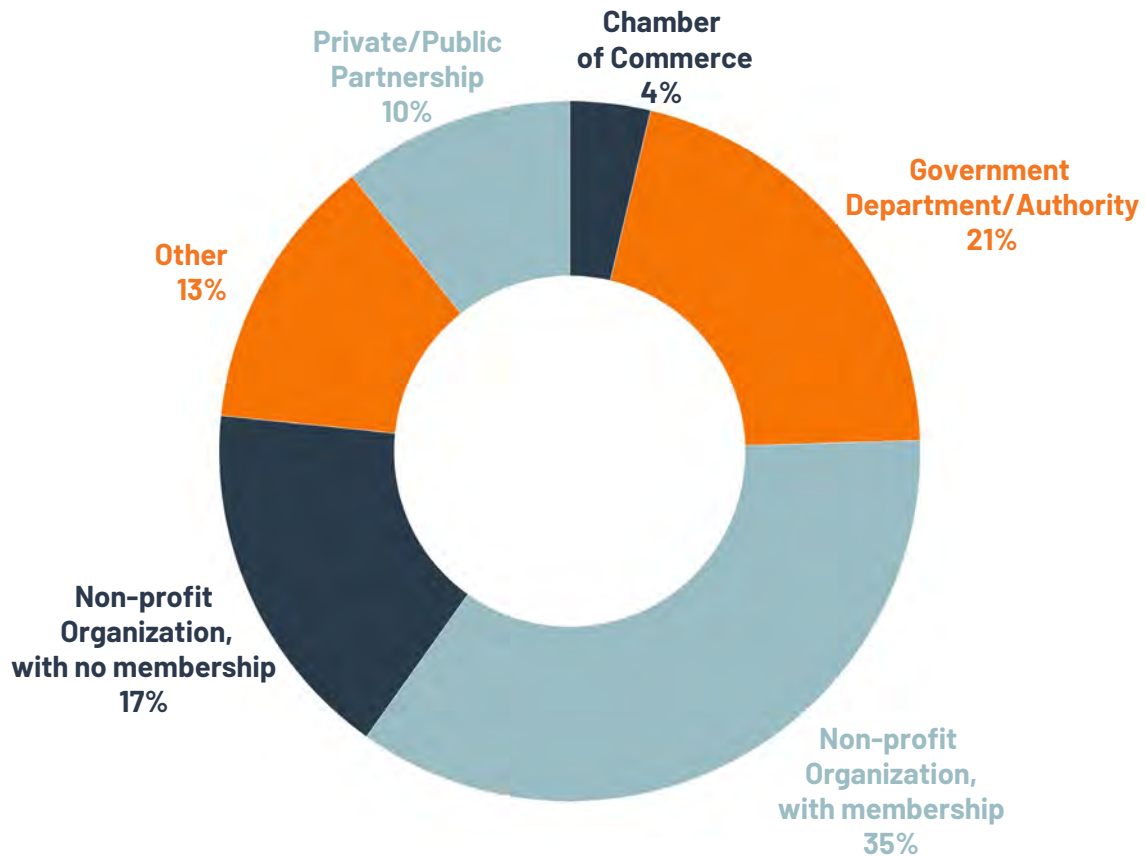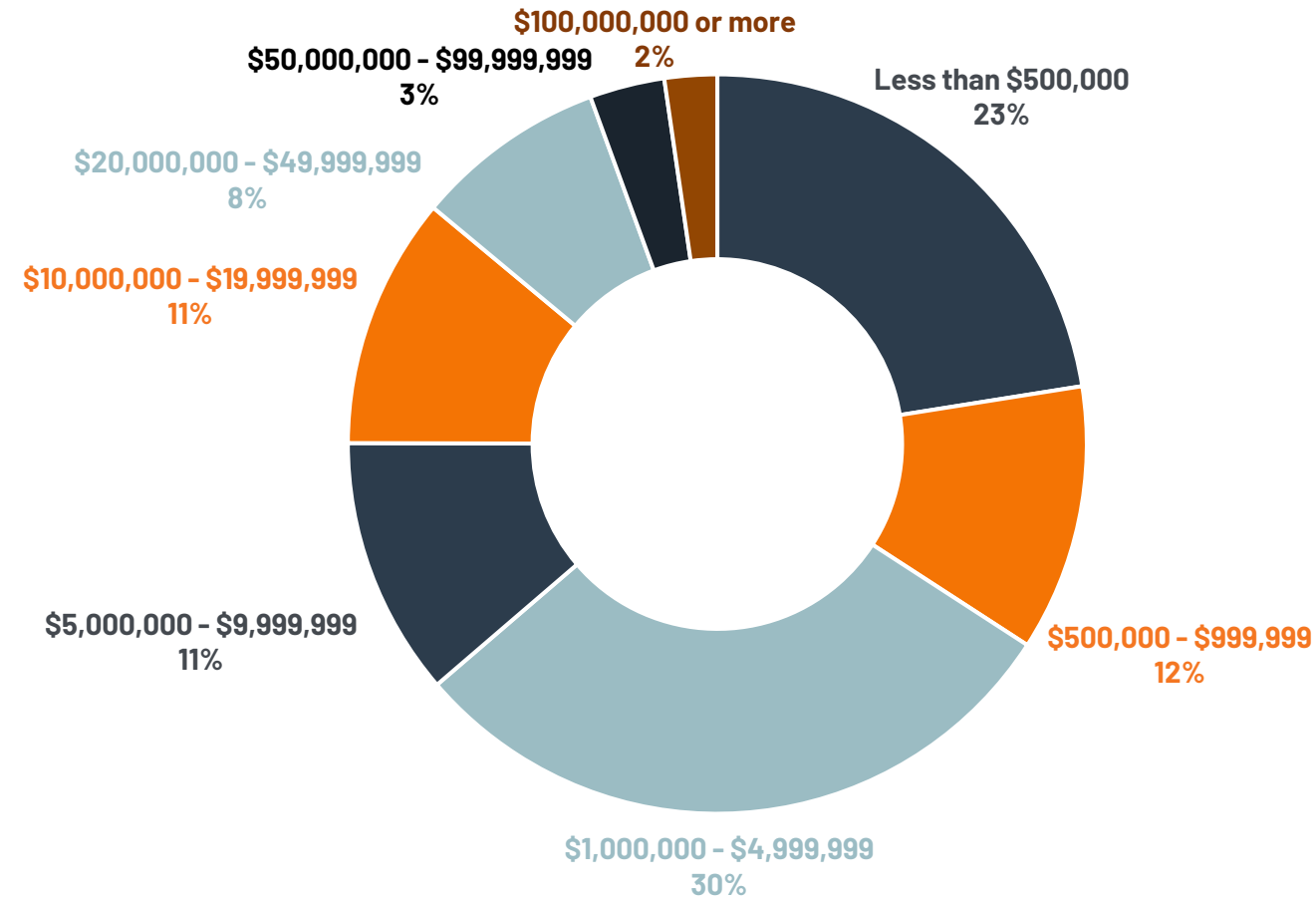**73%**

Yes
27%

Other 8%

Museum 3%

Theater 5%

Stadium 2%

Convention or Conference Center 22%

Visitor Information Center 60%

DESTINATIONS INTERNATIONAL

MMGY NextFactor

Business Model

- Private/Public Partnership 10%
- Chamber of Commerce 4%
- Government Department/Authority 21%
- Non-profit Organization, with membership 35%
- Non-profit Organization, with no membership 17%
- Other 13%

Budget

- $100,000,000 or more 2%
- $50,000,000 – $99,999,999 3%
- $20,000,000 – $49,999,999 8%
- $10,000,000 – $19,999,999 11%
- $5,000,000 – $9,999,999 11%
- $1,000,000 – $4,999,999 30%
- $500,000 – $999,999 12%
- Less than $500,000 23%

DESTINATIONS INTERNATIONAL   MMGY NextFactor

Top Trends

1 **+84** Artificial intelligence will become increasingly prevalent at an accelerated pace

2 **-** Customers are increasingly seeking a unique, authentic travel experience

3 **+27** Communities expect to be more engaged in destination, product and experience development for locals and visitors

4 **+28** Destinations are looking at sustainability/regeneration more broadly, encompassing economic, social and environmental impacts

5 **-4** Greater industry, community and government alignment is driving destination competitiveness and brand

6 **+32** Resident sentiment is becoming a key measurement

7 **+48** Labor and skill shortages are increasingly being felt in sectors of the tourism industry

8 **+20** There's a greater focus on placemaking to benefit both locals and visitors

9 **+17** DMO/CVBs are increasing advocacy to communicate value of visitor economy to government

10 **+6** New data management platforms provide a 360-degree view of visitors and destination to help optimize strategy

11 **-8** Content creation and dissemination by the public and stakeholders across all platforms drives the destination brand and experience

12 **+6** Organizations are increasingly developing strategic alliances across multiple economic sectors to leverage resources

13 **-7** Travelers are seeking more personal enrichment and wellbeing

14 **-10** Short-form video becomes the new currency of destination marketing and storytelling

15 **+12** There is greater focus on equity, diversity and inclusion in the workplace and across the supply chain

DESTINATIONS INTERNATIONAL   MMGY NextFactor

1

Artificial intelligence will become increasingly prevalent at an accelerated pace

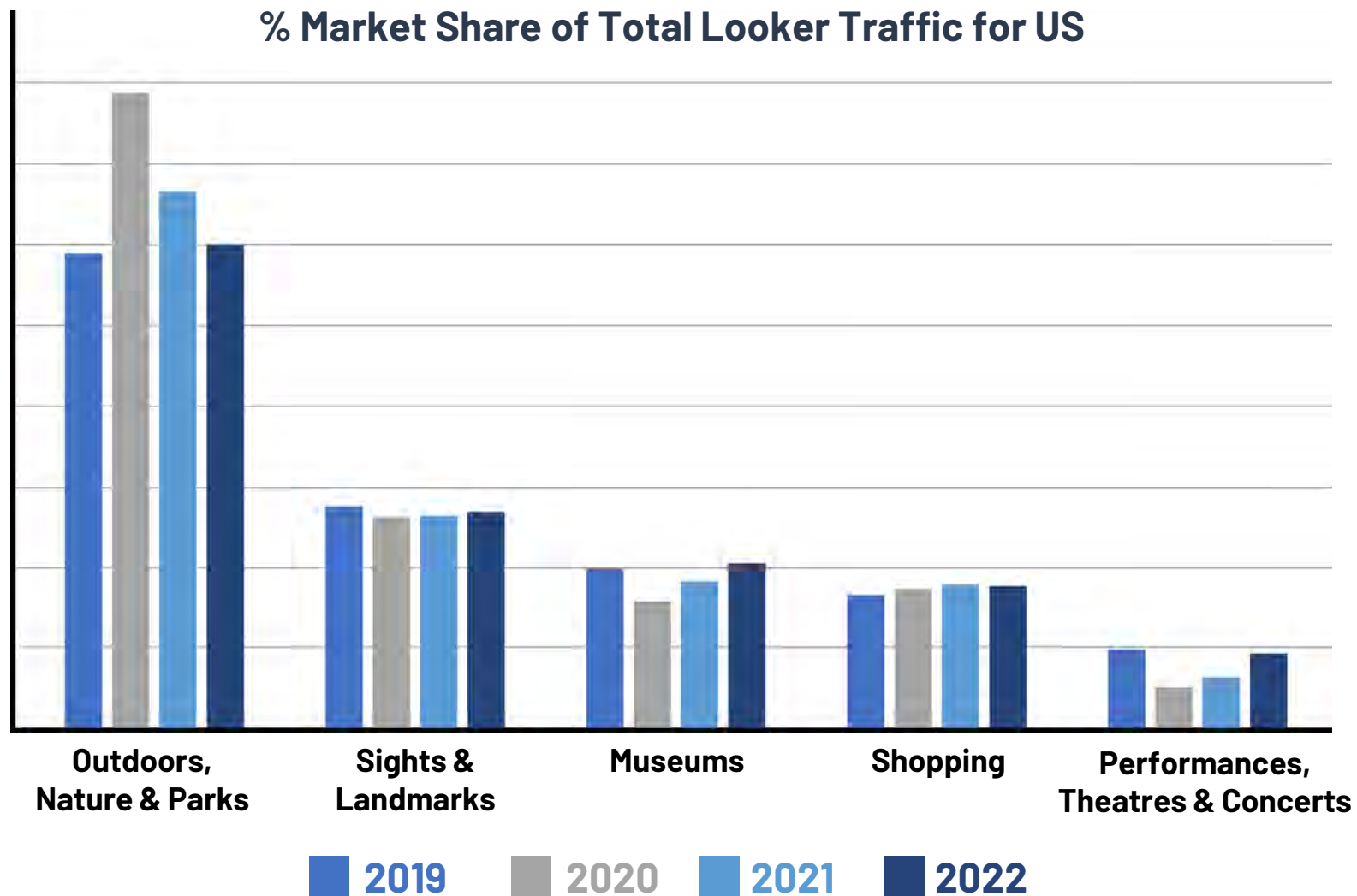**2** Customers are increasingly seeking a unique, authentic travel experience

EXPERIENCES

4

Destinations are looking at sustainability/regeneration more broadly, encompassing economic, social and environmental impacts

DESTINATION ALIGNMENT

Top Strategies

DESTINATIONS INTERNATIONAL

MMGY NextFactor

1 NEW Protect revenue sources to maintain current funding levels

2 +3 Focus on developing authentic experiences for the customer

3 +8 Better integrate tourism and economic development

4 - Build the destination brand around the community's goals, values and creative energy

5 +15 Have a greater role in destination and product development

6 +1 Develop a destination master/management plan to define long-term strategy

7 +5 Increase capabilities in data management for business intelligence, marketing and community engagement

8 -7 Focus significant attention on content creation and dissemination

9 NEW Develop a data-driven plan for a more sustainable visitor economy

10 +1 Align the visitor experience and quality of life for residents in my community

11 NEW Increase our organization's knowledge of innovative technologies

12 NEW Increase efforts to attract and retain our organization's talent

13 NEW Increase support with local government leadership to influence policy

14 +42 Develop and support new events in the destination

15 NEW Improve local resident sentiment to increase support for the visitor economy

2 Focus on developing authentic experiences for the customer

5 Have a greater role in destination & product development

6 Develop a destination master/management plan to define long-term strategy

9 Develop a data-driven plan for a more sustainable visitor economy

10 Align the visitor experience and quality of life for residents in my community

14 Develop & support new events in the destination

DESTINATIONS INTERNATIONAL   MMGY NextFactor

Roles & KPIs

Organization Role	Current
Destination marketing	1
Community relations and partnership	2
Brand management	3
Destination information resource	4
Data research and business intelligence	5
Destination and product development	6
Industry advocate	7
Government relations and policy development	8
Visitor services	9
Meetings and conventions sales	10
Broader economic development	11
Leisure sales	12
Equity, Diversity, Inclusion leadership	13
Environmental stewardship	14
Sports tourism development and promotion	15
Major event partner and developer	16
Workforce development	17
Crisis management and emergency preparedness	18

DESTINATIONS INTERNATIONAL

MMGY NextFactor

Organization Role	Current	Future
Destination marketing	1	1
Community relations and partnership	2	5
Brand management	3	3
Destination information resource	4	6
Data research and business intelligence	5	2 ⬆
Destination and product development	6	4 ⬆
Industry advocate	7	8
Government relations and policy development	8	7
Visitor services	9	11
Meetings and conventions sales	10	10
Broader economic development	11	9
Leisure sales	12	12
Equity, Diversity, Inclusion leadership	13	14
Environmental stewardship	14	13
Sports tourism development and promotion	15	16
Major event partner and developer	16	17
Workforce development	17	15
Crisis management and emergency preparedness	18	19

KPI	Current
Economic impact of tourism	1
Overnight visitation	2
Stakeholder support and business development	3
Room nights generated	4
Number of visitors/delegates	5
Visitor satisfaction	6
Marketing ROI	7
Member/partner satisfaction	8
Social media metrics	9
Community benefits and social impacts	10
Leads/referrals to business	11
Hotel performance metrics	12
Resident sentiment	13
Earned media metrics	14
Equity, diversity, and inclusion	15
Long-term/legacy impacts from events	16
Conversion metrics	17
Environmental stewardship impacts	18
Air service	19
Event bid success ratio	20
Venue profits	21

DESTINATIONS INTERNATIONAL MMGY NextFactor

Organization KPIs

KPI	Current	Future
Economic impact of tourism	1	1
Overnight visitation	2	3
Stakeholder support and business development	3	10
Room nights generated	4	8
Number of visitors/delegates	5	5
Visitor satisfaction	6	2 ⬆
Marketing ROI	7	4 ⬆
Member/partner satisfaction	8	6 ⬆
Social media metrics	9	13
Community benefits and social impacts	10	9
Leads/referrals to business	11	12
Hotel performance metrics	12	14
Resident sentiment	13	7 ⬆
Earned media metrics	14	16
Equity, diversity, and inclusion	15	11
Long-term/legacy impacts from events	16	17
Conversion metrics	17	15
Environmental stewardship impacts	18	18
Air service	19	19
Event bid success ratio	20	20
Venue profits	21	21

DESTINATIONS INTERNATIONAL   MMGY NextFactor

2 Transformational Opportunities

Community Leadership

Technology Adoption

Scenario Model

Scenario Model

Strong Destination Alignment

| VOYAGERS | TRAILBLAZERS |

Weak Destination ← — — — — — — — — — — — — → **Strong Destination**

| EXPLORERS | MOUNTAINEERS |

Weak Destination Alignment
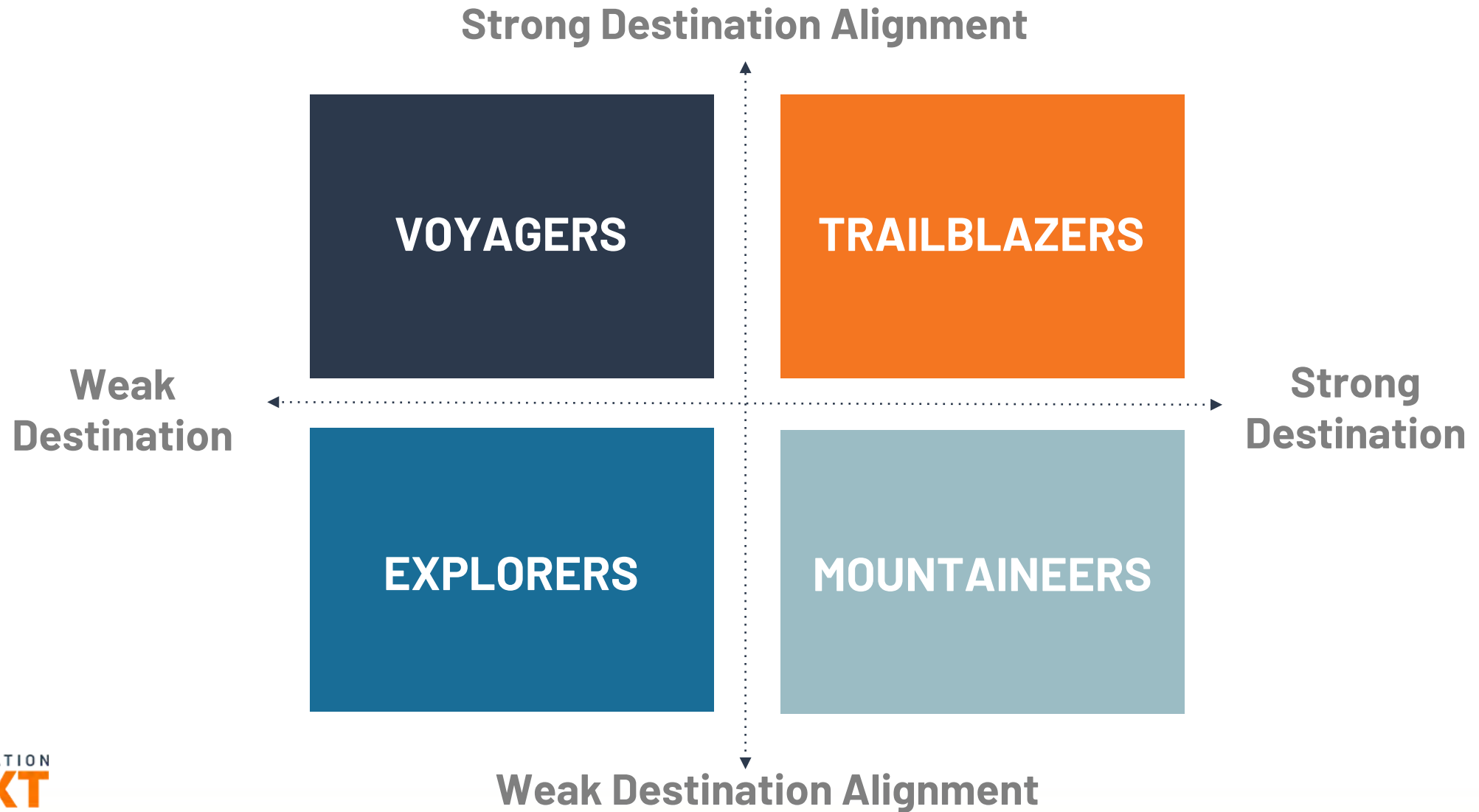
DESTINATION
NEXT

Destination Strength Variables
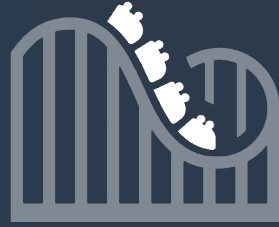
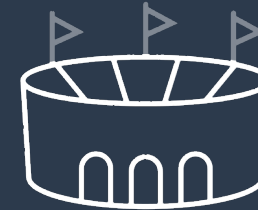Attractions & Experiences

Arts, Culture & Heritage

Dining, Shopping & Entertainment

Outdoor Recreation

Conventions & Meetings

Events & Festivals

Sporting Events

Accommodation

Local Mobility & Access

Destination Access

Communication Infrastructure

Health & Safety

DESTINATION NEXT

Destination **Alignment** Variables

Business Support

Community Group & Resident Support

Government Support

Organization Governance

Workforce Development

Hospitality Culture

Equity, Diversity & Inclusion

Funding Support & Certainty

Regional Cooperation

Sustainability & Resilience

Emergency Preparedness

Economic Development

DESTINATION NEXT

Stakeholder Groups

Total Respondents

238
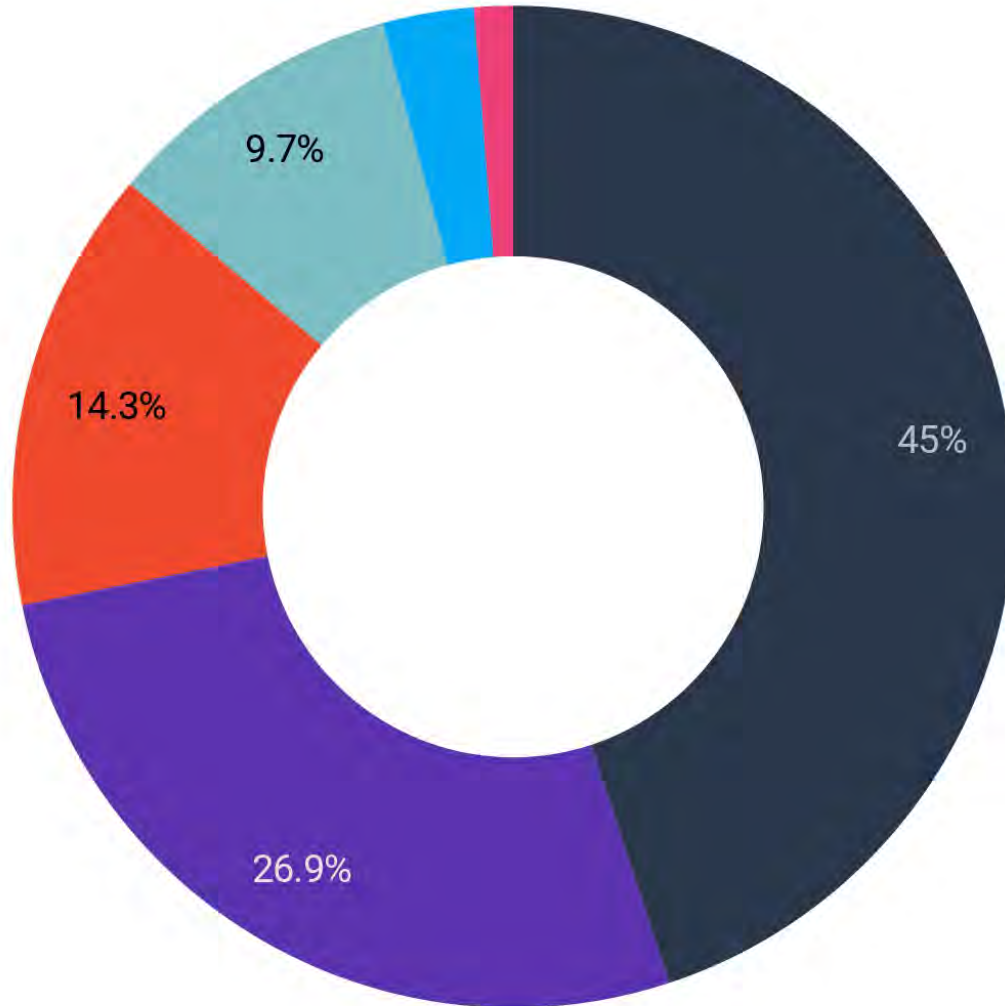
- Community Leaders — 45%
- Orange County Tourism Partners — 26.9%
- Government Leaders — 14.3%
- Customers — 9.7%
- Chapel Hill/Orange County Visitors Bureau Board of Directors
- Chapel Hill/Orange County Visitors Bureau Team

Participants by Community Identify
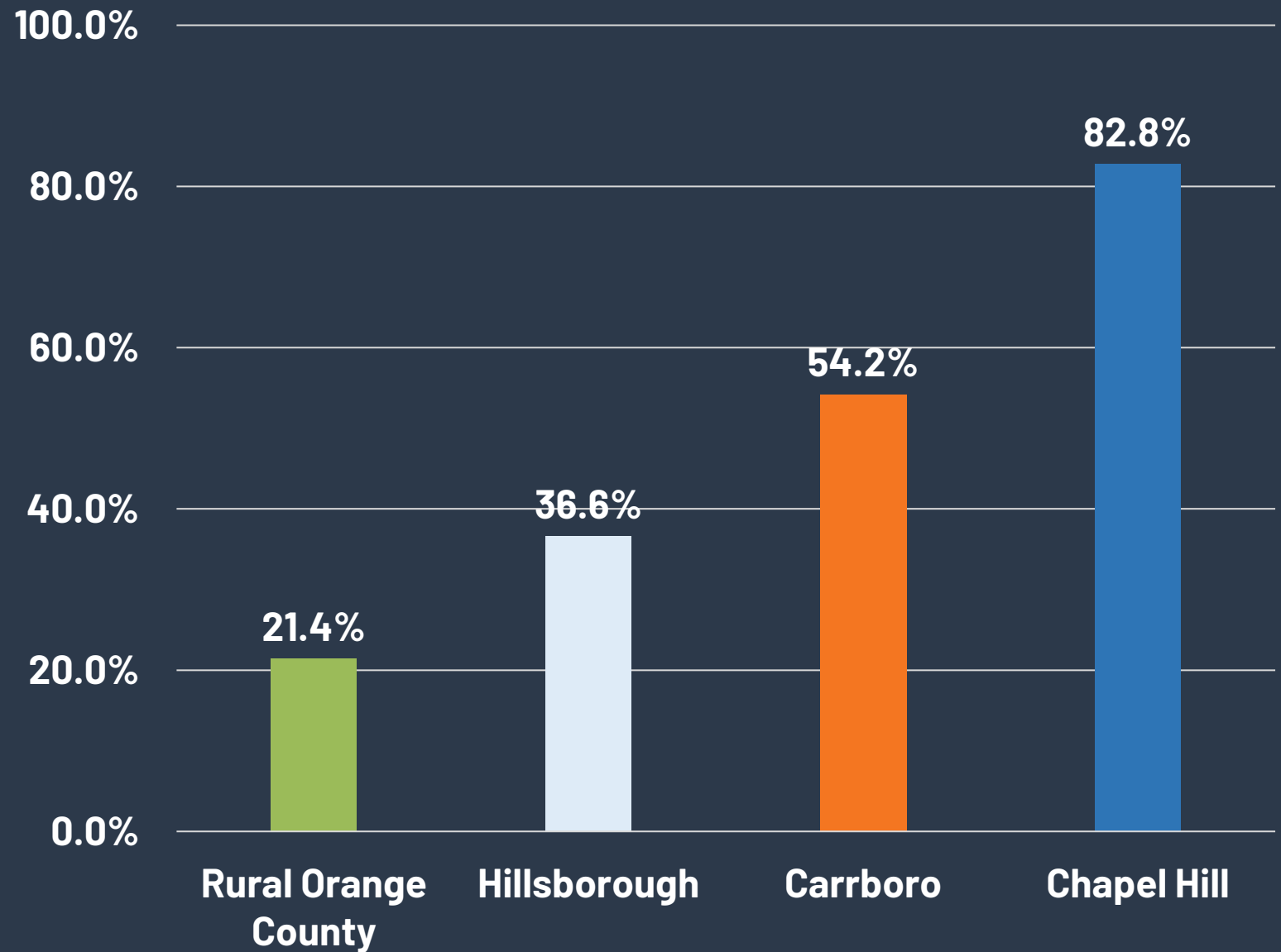
Significant Differences

There is **no** significant difference in overall scores based on community affiliation

There are 3 destination strength variables with significant differences based on community affiliation

There are numerous individual statements within variables with significant differences

Participants by UNC Affiliation

6.3%

9.7%

84.0%

■ No Current Affiliation   ■ Previously Employed or Attending

■ Currently Employed

Significant Differences

There is **no** significant difference in overall scores based on UNC affiliation

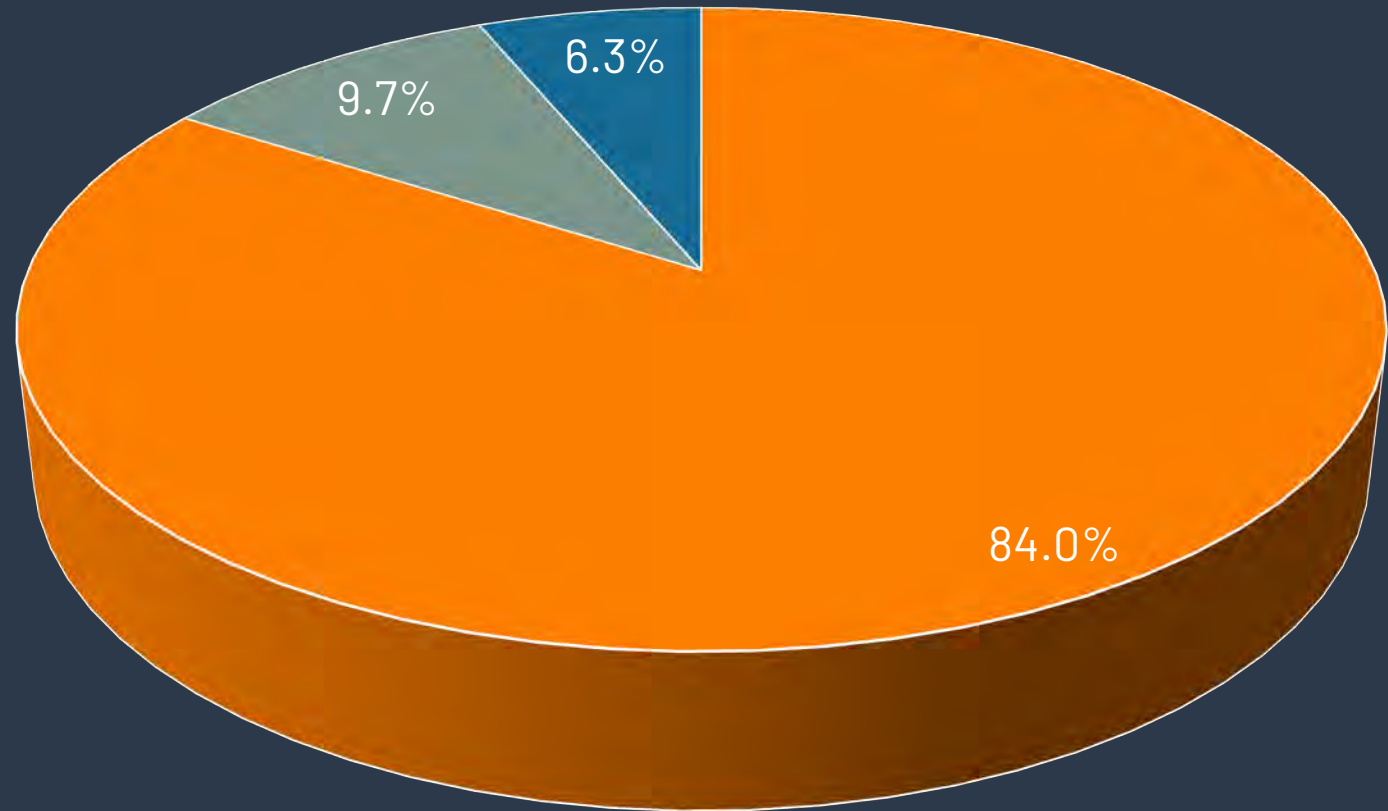There is 1 destination strength variable and no community alignment variables with significant differences based on UNC affiliation

There are numerous individual statements within variables with significant differences

Age

Total Respondents

238

Legend:
- 18 - 34
- 35 - 49
- 50 - 64
- Over 65

Chart values:
- 3.4%
- 22.7%
- 45%
- 29%

Overall Assessment

Strong Destination Alignment

Voyagers

Trailblazers

Chapel Hill/Orange County

Weak Destination

Strong Destination

Explorers

Mountaineers

Weak Destination Alignment
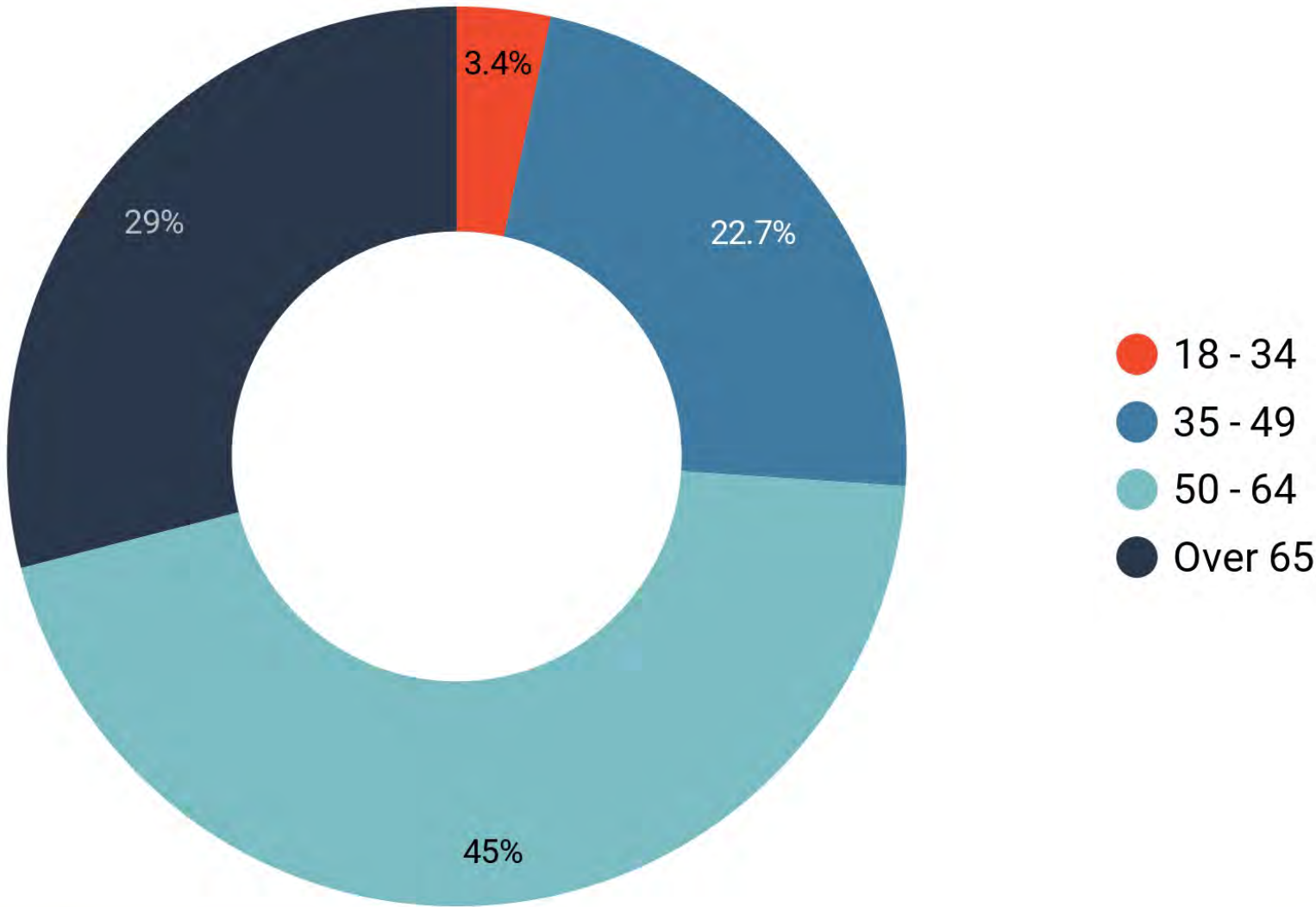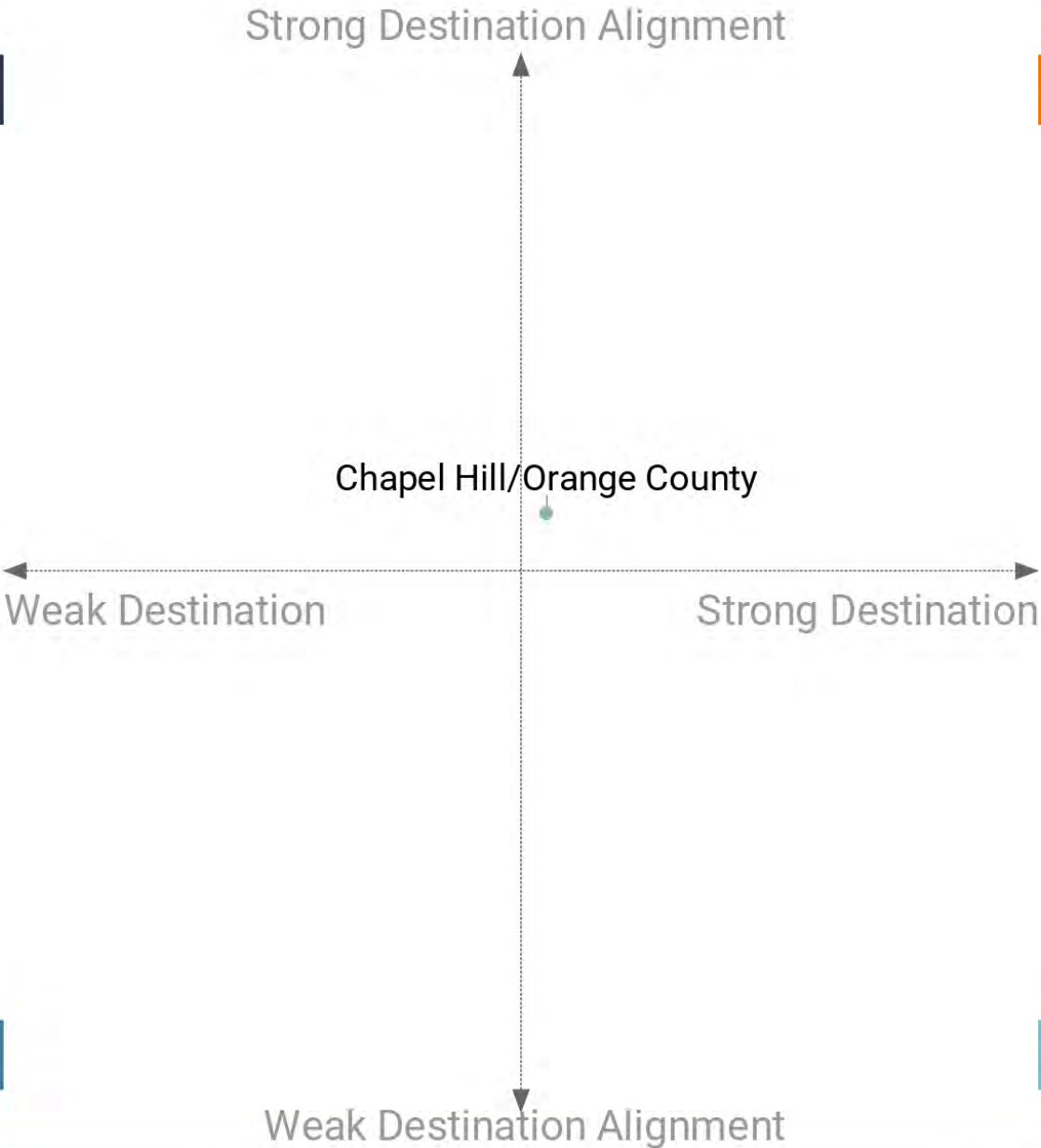
Destination vs. Industry Average
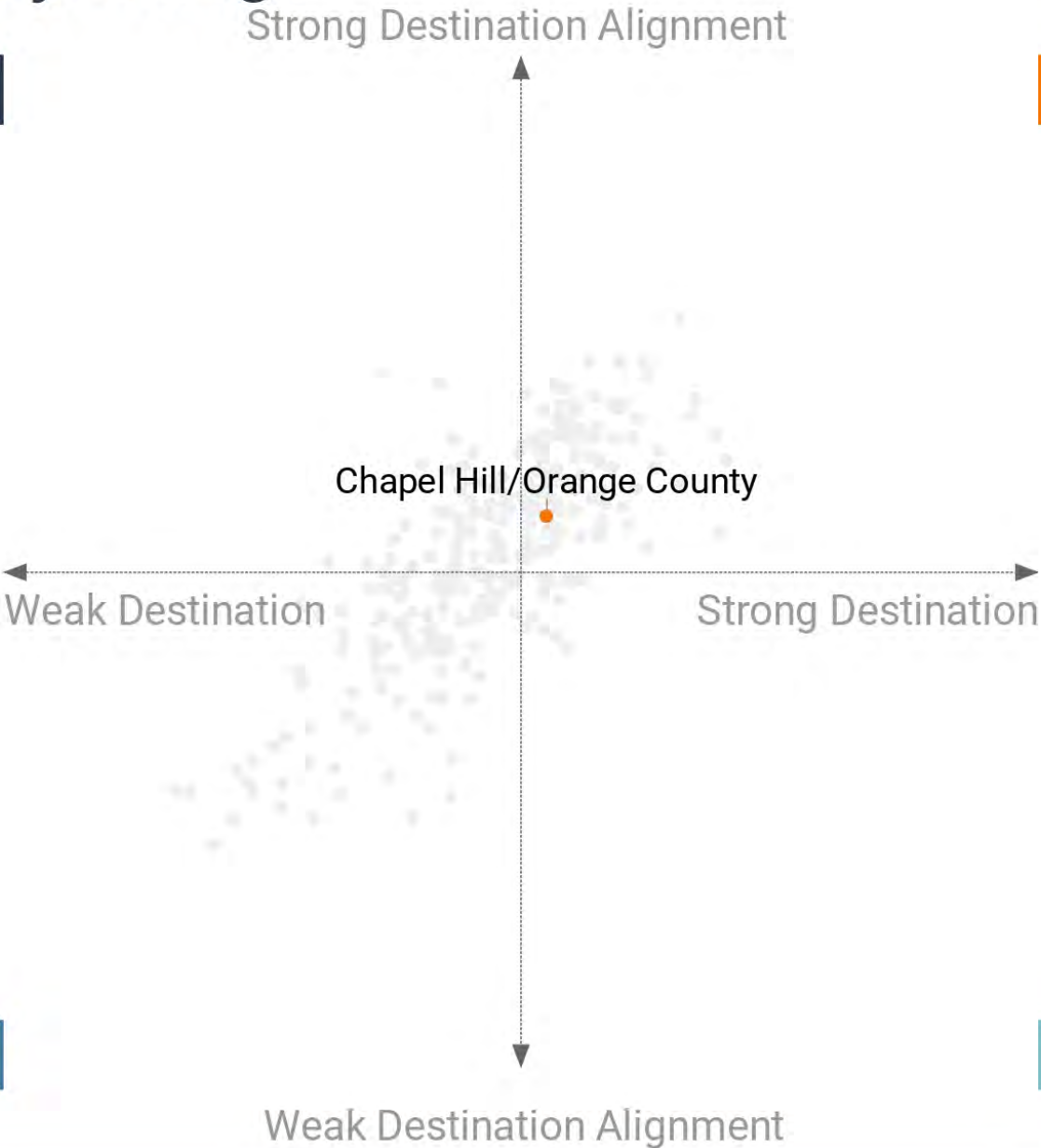
Strong Destination Alignment

Voyagers

Trailblazers

Chapel Hill/Orange County

Weak Destination

Strong Destination

Explorers

Mountaineers

Weak Destination Alignment

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Destination Strength

MMGY NextFactor
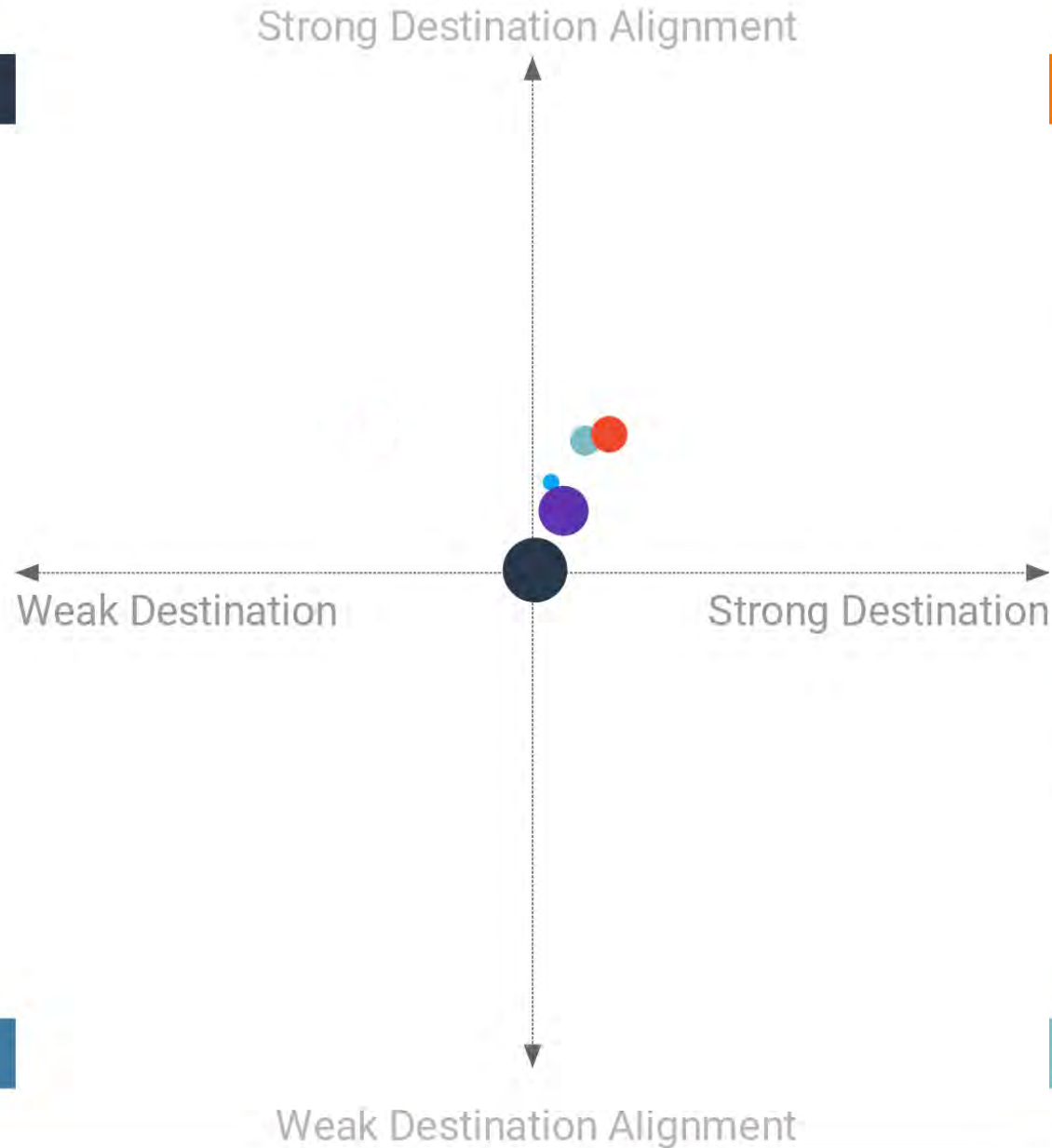
Destination Strength

Variable	Relative Importance (0-100%)		Perceived Performance (1 - 5 scale)	
	All DNEXT Communities	Orange Co.	All DNEXT Communities	Orange Co.
Attractions & Experiences	9.00%	9.46%	3.70	3.82
Dining, Shopping & Entertainment	8.75%	9.13%	3.46	3.65
Sporting Events	8.01%	8.99%	3.42	3.77
Health & Safety	8.17%	8.93%	3.32	3.72
Arts, Culture & Heritage	8.35%	8.71%	3.62	4.06
Accommodation	8.75%	8.68%	3.60	3.35
Communication Infrastructure	8.30%	8.63%	3.23	3.72
Destination Access	8.05%	7.95%	3.23	3.63
Local Mobility & Access	8.25%	7.80%	3.01	3.10
Events & Festivals	8.29%	7.68%	3.66	3.42
Outdoor Recreation	8.64%	7.55%	3.74	3.91
Conventions & Meetings	7.88%	6.51%	3.35	3.33

Green indicates destination performance +5% above industry average; red indicates -5% below.

	Industry Average	Destination
Destination Strength	3.45	3.60

Scenario: Trailblazers

Destination Strength: Perceived Performance by Stakeholder Group

Variable	Perceived Performance (1 - 5 scale)					
	Overall	Board	Comm. Leaders	Customers	Government	Ind. Partners
Arts, Culture & Heritage	4.1	3.9	3.6	4.0	4.2	4.3
Outdoor Recreation	3.9	3.6	3.6	3.9	3.8	4.0
Attractions & Experiences	3.8	3.6	2.7	3.8	3.9	3.9
Sporting Events	3.8	2.9	2.2	3.8	4.0	3.7
Health & Safety	3.7	3.5	3.7	3.6	3.9	4.1
Communication Infrastructure	3.7	4.4	3.9	3.6	3.7	3.9
Dining, Shopping & Entertainment	3.7	3.6	3.1	3.5	3.7	3.8
Destination Access	3.6	3.9	3.9	3.5	3.6	3.9
Events & Festivals	3.4	3.6	1.8	3.3	3.6	3.6
Accommodation	3.4	3.5	2.9	3.3	3.5	3.5
Conventions & Meetings	3.3	3.4	2.5	3.3	3.5	3.3
Local Mobility & Access	3.1	3.3	3.1	3.1	3.3	3.3

	Industry Average	Destination
Destination Strength	3.45	3.60

Destination Strength: Perceived Performance by Stakeholder Group

Perceived Performance (1 - 5 scale)						
Variable	Overall	Board	Comm. Leaders	Customers	Government	Ind. Partners
Arts, Culture & Heritage	4.1	3.9	3.6	4.0	4.2	4.3
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Health & Safety	3.7	3.5	3.7	3.6	3.9	4.1
Communication Infrastructure	3.7	4.4	3.9	3.6	3.7	3.9
Dining, Shopping & Entertainment	3.7	3.6	3.1	3.5	3.7	3.8
Destination Access	3.6	3.9	3.9	3.5	3.6	3.9
Events & Festivals	3.4	3.6	1.8	3.3	3.6	3.6
Accommodation	3.4	3.5	2.9	3.3	3.5	3.5
Conventions & Meetings	3.3	3.4	2.5	3.3	3.5	3.3
Local Mobility & Access	3.1	3.3	3.1	3.1	3.3	3.3

	Industry Average	Destination
Destination Strength	3.45	3.60

Scenario: Trailblazers

Attractions & Experiences

Assortment of authentic attractions — 4.13

Iconic attractions — 3.83

Many things to see and do — 3.7

Year-round attractions and experiences — 3.6

1: Strongly disagree 5: Strongly agree

Outdoor Recreation

Wide diversity of accessible hiking and biking trails — 4.25

High-quality outdoor recreation experiences — 3.95

Year-round outdoor experiences — 3.87

Adequate outdoor recreational suppliers — 3.54

1   5

1: Strongly disagree   5: Strongly agree

Events & Festivals

Destination supports major events — 3.57

Quality facilities with capacity to host events — 3.39

Year-round series of events — 3.38

Iconic event — 3.34

1 ———— 5

1: Strongly disagree   5: Strongly agree

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Sporting Events

Facilities and venues to host major amateur sporting events — 4.11

Adequate financial support for sporting events — 3.75

Engaged and helpful local sports leadership — 3.66

Venues for hosting major professional sporting events — 3.54

1

5

1: Strongly disagree 5: Strongly agree

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Accommodation

Established brand name hotels — 3.69
Short-term rentals do not impede quality of life — 3.5
Adequate economy hotel supply — 3.42
Adequate supply of sharing economy accommodations — 3.26
Adequate supply of quality campgrounds — 2.57

1   5

1: Strongly disagree 5: Strongly agree

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Communication Infrastructure

Wi-Fi access in meeting/convention facilities — 3.91

Mobile coverage/availability at attractions and entertainment areas — 3.9

Sufficient broadband width — 3.54

Sufficient free Wi-Fi in outdoor/public areas — 3.46

1 ———— 5

1: Strongly disagree 5: Strongly agree

Health & Safety

Complying with the latest public health mandates — 4.45

Clean destination, free from litter — 4.02

Safe from crime — 3.63

Limited issues with homelessness — 2.74

1 — 5

1: Strongly disagree 5: Strongly agree

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Destination Strength: Highest & Lowest Variable Scores

Highest-scored Variables

	Variable	Performance ▼
1.	Arts, Culture & Heritage	4.06
2.	Outdoor Recreation	3.91
3.	Attractions & Experiences	3.82
4.	Sporting Events	3.77
5.	Health & Safety	3.72

Lowest-scored Variables

	Variable	Performance ▲
1.	Local Mobility & Access	3.10
2.	Conventions & Meetings	3.33
3.	Accommodation	3.35
4.	Events & Festivals	3.42
5.	Destination Access	3.63

Destination Strength: Highest & Lowest Statement Scores

Highest-scored Statements

	Statement	Performance ▾
1.	Complying with the latest public health mandates	4.45
2.	Variety and quality domestic air access	4.31
3.	Wide diversity of accessible hiking and biking trails	4.25
4.	Destination promotes, preserves, and enhances local arts, culture and heritage	4.22
5.	Assortment of authentic attractions	4.13

Lowest-scored Statements

	Statement	Performance ▴
1.	Multi-language directional signage	2.50
2.	Accessible via public transit	2.55
3.	Adequate supply of quality campgrounds	2.57
4.	Limited issues with homelessness	2.74
5.	Adequate parking facilities	2.83

Community Alignment

Community Alignment

Variable	Relative Importance (0-100%)		Perceived Performance (1 - 5 scale)	
	All DNEXT Communities	Orange Co.	All DNEXT Communities	Orange Co.
Business Support	8.49%	8.97%	3.82	4.00
Equity, Diversity & Inclusion	8.03%	8.95%	3.59	3.85
Organization Governance	7.99%	8.94%	3.75	4.11
Sustainability & Resilience	8.36%	8.63%	3.58	4.04
Government Support	8.47%	8.60%	3.67	4.08
Workforce Development	8.56%	8.54%	2.88	2.81
Hospitality Culture	8.50%	8.42%	3.62	3.89
Economic Development	8.32%	7.99%	3.91	4.15
Emergency Preparedness	8.29%	7.98%	3.44	3.96
Community Group & Resident S...	8.29%	7.93%	3.53	3.91
Funding Support & Certainty	8.38%	7.59%	3.29	3.35
Regional Cooperation	8.29%	7.47%	3.72	3.96

Green indicates destination performance +5% above industry average; red indicates -5% below.

	Industry Average	Destination
Community Alignment	3.52	3.77

Scenario: Trailblazers

Community Alignment: Perceived Performance by Stakeholder Group

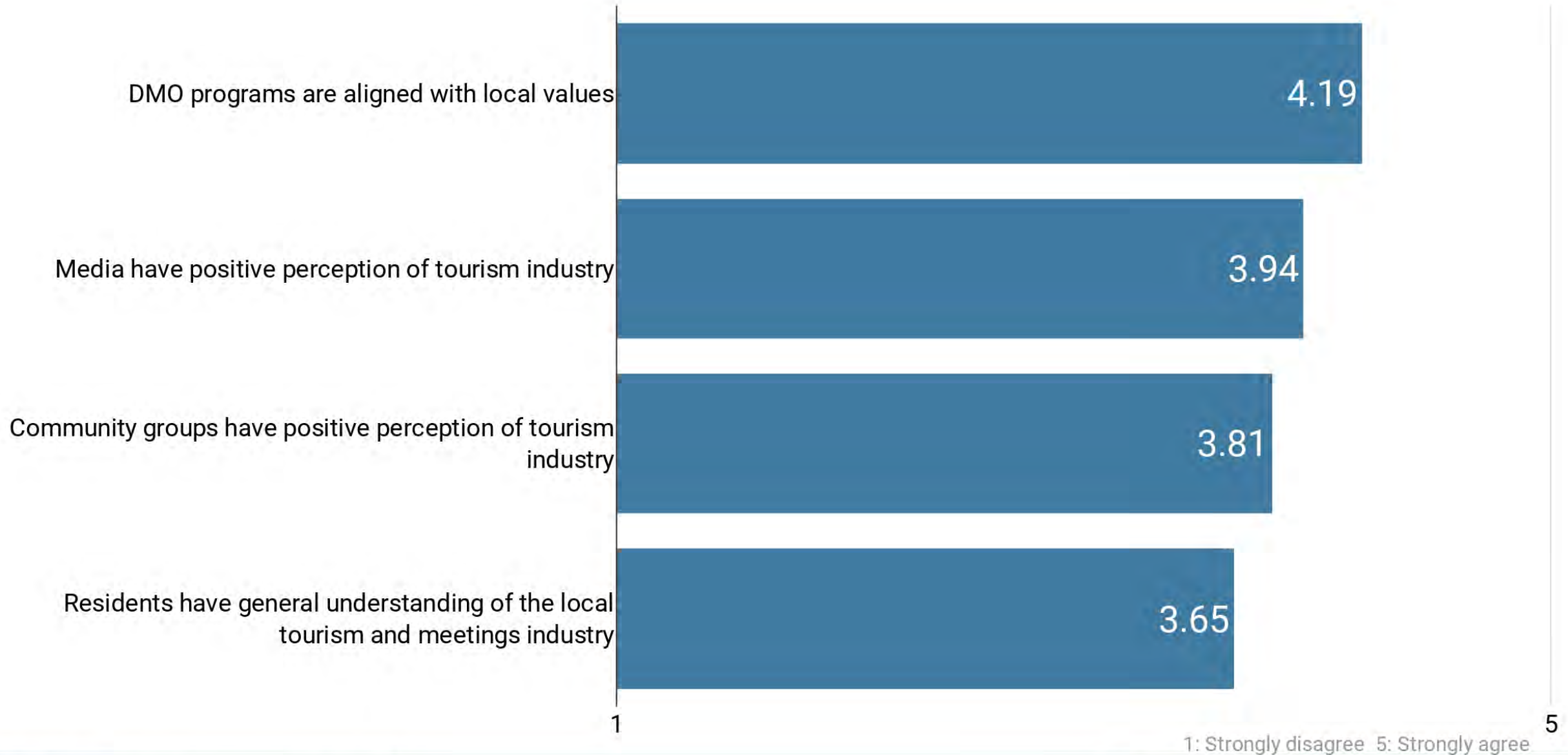|	Perceived Performance (1 - 5 scale)						
Variable	Overall	Board	Staff	Comm. Leaders	Customers	Government	Partners
Economic Development	4.2	4.1	4.2	4.0	4.3	4.4	4.3
Organization Governance	4.1	4.7	4.1	4.0	4.2	4.2	4.1
Government Support	4.1	4.6	4.6	3.9	4.4	4.2	4.1
Sustainability & Resilience	4.0	3.9	4.3	3.9	4.2	4.3	4.0
Business Support	4.0	3.8	4.5	3.8	4.2	4.3	4.0
Regional Cooperation	4.0	4.3	4.7	3.7	4.2	4.1	4.1
Emergency Preparedness	4.0	3.9	4.0	3.8	3.9	4.3	4.2
Community Group & Resi...	3.9	3.7	4.3	3.8	4.1	4.2	3.9
Hospitality Culture	3.9	3.7	3.8	3.7	4.1	4.1	4.0
Equity, Diversity & Inclusi...	3.8	3.7	3.8	3.7	4.1	4.1	3.8
Funding Support & Certai...	3.4	3.6	4.2	3.1	3.7	3.6	3.3
Workforce Development	2.8	2.9	2.4	2.7	3.1	3.0	2.7

	Industry Average	Destination
Community Alignment	3.52	3.77

Scenario: Trailblazers

Business Support

Tourism industry leaders are advocates of DMO — 4.22

DMO is well-known in the community — 4.01

Non-tourism businesses have general tourism industry understanding — 3.74

1   5

1: Strongly disagree 5: Strongly agree

Chapel Hill/Orange County   Jan 11, 2024

Community & Resident Support

Chart showing Community & Resident Support ratings on a scale from 1 to 5:

Statement	Rating
DMO programs are aligned with local values	4.19
Media have positive perception of tourism industry	3.94
Community groups have positive perception of tourism industry	3.81
Residents have general understanding of the local tourism and meetings industry	3.65

1: Strongly disagree 5: Strongly agree

Government Support

DMO programs are aligned with government policies — 4.17

Government staff are supportive of DMO — 4.12

Local government relies on DMO for input — 4.03

DMO advocacy program informs government policy — 4

1 5

1: Strongly disagree 5: Strongly agree

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Organization Governance Model

DMO measures and tracks tourism industry performance — 4.26

Effective DMO governance structure — 4.18

Local leaders are engaged in DMO governance structure — 4.09

DMO is diverse in Board and organization — 3.83

1   5

1: Strongly disagree   5: Strongly agree

Workforce Development

Positive labor relations environment — 3.63
Effective training programs — 3.27
Adequate workforce for management jobs — 3.18
Public transportation for workers — 3.02
Adequate workforce for frontline hospitality jobs — 3.01
Adequate healthcare options for workers — 2.83
Affordable daycare options for workers — 2.08
Adequate affordable housing for workers — 1.86

1   5
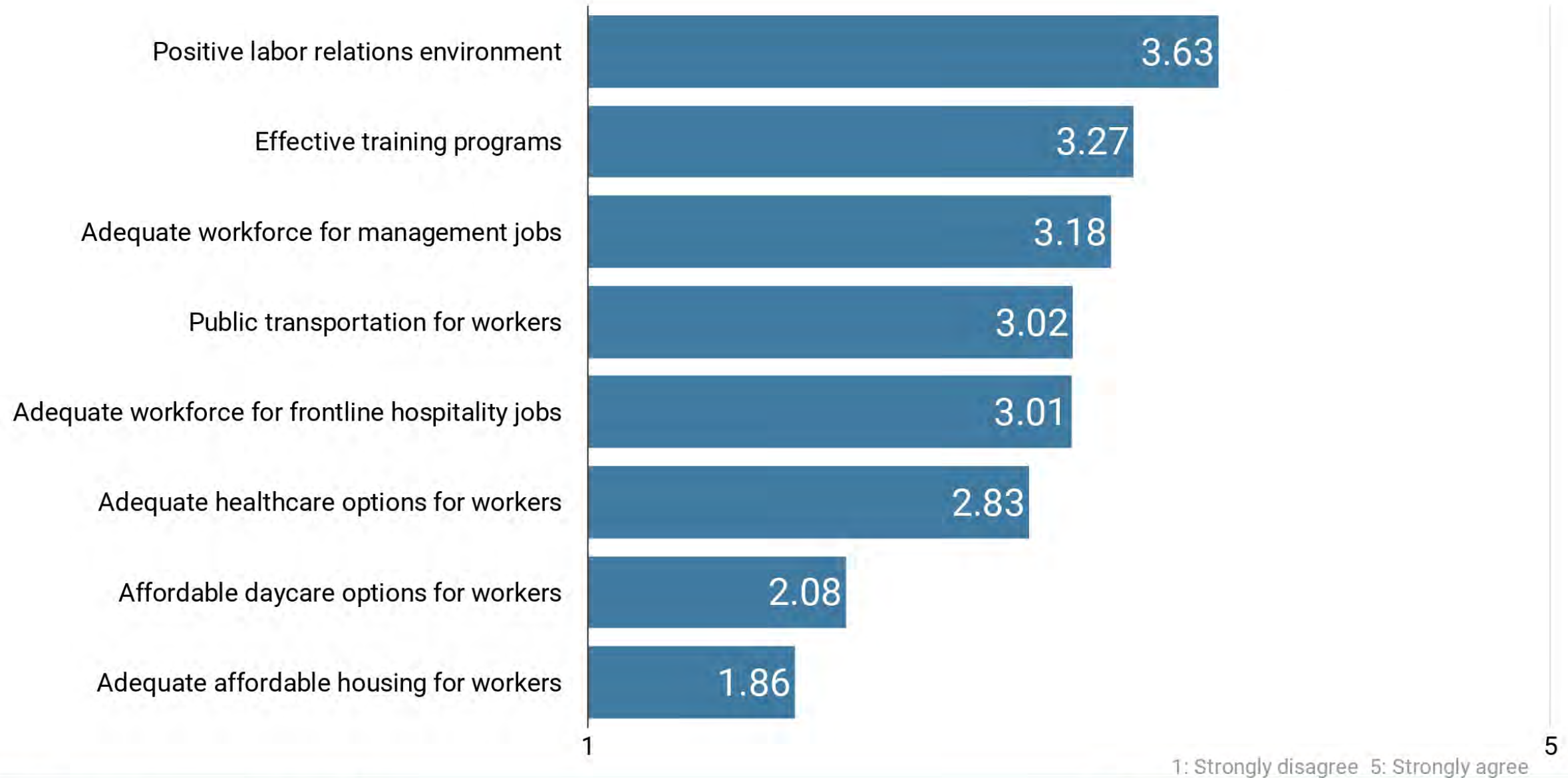
1: Strongly disagree   5: Strongly agree

Hospitality Culture

Hospitality-minded culture — 4.13

High-quality customer service — 4.01

Offering opportunities to connect with the local people and culture — 3.81

Adequate customer service training programs — 3.27

1

5

1: Strongly disagree   5: Strongly agree

Equity, Diversity & Inclusion

Engaging diverse cultures, perspectives, and voices — 4.04

Ensuring all visitors feel welcome — 4.01

Appealing to a wide range of visitors — 3.81

Broadening participation in the economy to residents and visitors — 3.74

Reasonable accessibility to visitors with physical, mental, and sensory impairments or disabilities — 3.55

1: Strongly disagree 5: Strongly agree

Regional Cooperation

DMO's efforts generate broad economic benefits — 4.14

Destination's marketing efforts have economic benefits across the region — 4.13

Collaboration and coordination among tourism partners — 3.89

Cities and towns work cooperatively to market destination — 3.68

1   5

1: Strongly disagree   5: Strongly agree

Sustainability & Resilience

Protecting and enhancing the natural environment	4.06
Preserving and enhancing the community values	4.06
Visitors do not impede quality of life	4.04
Encouraging responsible visitor behavior	3.99

1   5

1: Strongly disagree 5: Strongly agree

Economic Development

DESTINATION NEXT

DMO and tourism industry play a critical role in long-term economic development — 4.35

DMO has good relationship with economic development agencies — 4.29

Broader economic development strategies consider the visitor economy — 4.06

Destination master plan includes a long-term vision and strategy for the destination — 3.69

1   5

1: Strongly disagree 5: Strongly agree

Community Alignment: Highest Variable Scores

Highest-scored Variables

	Variable	Performance ▾
1.	Economic Development	4.15
2.	Organization Governance	4.11
3.	Government Support	4.08
4.	Sustainability & Resilience	4.04
5.	Business Support	4.00

Lowest-scored Variables

	Variable	Performance ▴
1.	Workforce Development	2.81
2.	Funding Support & Certainty	3.35
3.	Equity, Diversity & Inclusion	3.85
4.	Hospitality Culture	3.89
5.	Community Group & Resident Support	3.91

Community Alignment: Highest & Lowest Statement Scores

Highest-scored Statements

	Statement	Performance ▾
1.	DMO and tourism industry play a critical role in long-term economic development	4.35
2.	DMO has good relationship with economic development agencies	4.29
3.	DMO measures and tracks tourism industry performance	4.26
4.	Tourism industry leaders are advocates of DMO	4.22
5.	DMO programs are aligned with local values	4.19

Lowest-scored Statements

	Statement	Performance ▴
1.	Adequate affordable housing for workers	1.86
2.	Affordable daycare options for workers	2.08
3.	Adequate healthcare options for workers	2.83
4.	Sufficient funds for attracting events	2.99
5.	Adequate workforce for frontline hospitality jobs	3.01

Open-Ended Questions

Where do you take non-resident family and friends when you host them as visitors? What types of activities do they enjoy?

- Restaurants and dining in Chapel Hill, Carrboro, Hillsborough, and other nearby areas.

- UNC campus and sporting events, especially basketball and football.

- Outdoors and nature areas such as hiking trails, parks, gardens, nature preserves, etc.

- Cultural attractions (museums, galleries, music and theatre) and downtown areas

- Historic sites, neighborhoods and architecture

What knowledge do you have about Orange County's farms and the amenities they offer?

Positive - 80%

Conditional Positive - 10%

Neutral - 10%

Do you think our university athletic fields should be used for outside entertainment/ events? (like Wrexham vs. Chelsea soccer)

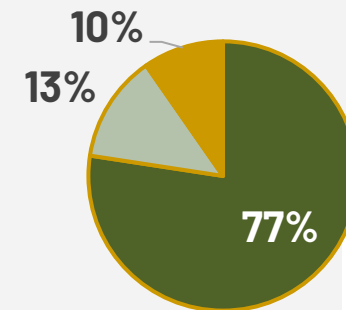"Yes! It was a great boost to our local community!"

"Yes! It shows a great partnership."

"If financial support is provided to the university, then such uses are appropriate."

"Only if all costs are covered by the events and it does not cause traffic and other problems."

"No opinion. It is a UNC decision."

Summary

- **Orange County is in the trailblazer quadrant with above average scores for destination alignment and destination strength.**
- **Different stakeholder groups have aligned perception of the destination with the exception of the 18–34-year-olds who were significantly less positive** (but this is a very small sample size).
- **There are no significant differences in overall scores based on community identity or UNC affiliation.**
- **There are several key takeaways to consider:**

Key Takeaways

- Consider if and how you might address some of the issues outside of your core mission of attracting and serving visitors. Workforce issues (affordable housing, daycare and healthcare), local mobility & access issues (public transportation, parking, multi-language signage and wayfinding), and safety (homelessness) were some of your lowest scores. Is there an advocacy role you could play in this?

- You have a nice inventory of farm activities and amenities. Consider increasing your promotion of these assets to *existing* visitors as a means of providing things to see and do increasing visitor satisfaction. (Note that these are likely satisfiers, not motivators.)

- Increasing the occasional use of UNC sports facilities for athletic and entertainment events has a lot of support from survey respondents. Consider if a taskforce is needed to pursue gaining support from the university for this.

- Respondents who self-identified as community leaders (non-tourism) gave significantly lower scores in destination strength, particularly in the festivals and events variable (1.8 versus an average score of 3.4). Is this something that you are aware of, and is there a role for your organization in this?

Key Issues Discussed in Breakouts

- What strategies should be used when approaching UNC about hosting outside events/entertainment?

- Are there community challenges that the Visitor's Bureau should have a seat at the table to bring the voice of the visitor into the discussion?

- The Futures Study showed the DMOs are shifting beyond marketing into destination and product development. What thoughts do you have about how (and if) this could be done in Orange County?

1 **Key Issues Discussed in Breakouts**

What strategies should be used when approaching UNC about hosting outside events/entertainment?

- Establish a taskforce to consider this.

- Understand the various capacity, bandwidth of staff resources, and limited windows of venue availability before approaching.

- Compute the true cost/benefit of UNC taking on this additional work.

- If this gets implemented, make sure to encourage auxiliary activities to happen currently to keep people in town and maximize impact. Consider ambassadors on the street to help visitors know where to go.

- Side note – this is a bigger issue about capacity and needing a true meeting venue (like a convention center) so this should be discussed as well.

2 Key Issues Discussed in Breakouts

Are there community challenges that the Visitor's Bureau should have a seat at the table to bring the voice of the visitor into the discussion?

- There are some policy changes that could help (panhandling is illegal within 25 ft of an ATM...could this be expanded to other areas such as outdoor dining spaces?)
- Train Visitor Center staff about the issue, resources available, etc. They need to understand the issue from how it impacts visitor-facing business, too, and communicate with policy leaders about both.

3 **Key Issues Discussed in Breakouts**

The Futures Study showed the DMOs are shifting beyond marketing into destination and product development. What thoughts do you have about how (and if) this could be done in Orange County?

- There is a need to better connect the three towns within Orange County. A good example of doing this was the Uproar festival. These strategies can help extend the stay of visitors.
- Can the visitor's bureau suggest creative ways to pull together the stakeholders throughout the county to work cooperatively?
- Transportation is an obvious detriment that should be explored (shuttle services, regularly scheduled cross-county tours, bike paths, etc., all with safety in mind).
- Think beyond only public initiatives to public-private partnerships.

Thank You!

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