

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.

Wake County

Destination Strategic Plan



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Summary of Stakeholder Engagement

JLL has conducted an in depth stakeholder engagement process throughout the Destination Strategic Plan (DSP) initiative. The following is a summary of the outreach conducted from the initial meetings in August of 2017 through July of 2018. In addition, many of the groups and individuals listed below have had multiple conversations not included in the total count.

- Total stakeholders reached or touched through this process: 1,829
 - Resident survey – 1,044
 - Stakeholder survey – 380
 - Unique focus groups – 46 (total individual attendance 451)
 - 1. All 12 municipalities
 - 2. Wake County Administration
 - 3. Wake County Council Members
 - 4. Wake County Parks and Recreation
 - 5. GRCVB Board
 - 6. Passionate Minds
 - 7. Downtown Raleigh Alliance
 - 8. Crabtree Valley Mall
 - 9. Wake Hospitality Alliance
 - 10. Cary Sports Alliance
 - 11. Raleigh Transportation Alliance
 - 12. Greater Raleigh Merchants Association
 - 13. Culinary/Food and Beverage Leaders
 - 14. USA Baseball
 - 15. Cultural Presenters
 - 16. Centennial Authority
 - 17. NC State Centennial Campus
 - 18. Blue Ridge Corridor Alliance
 - 19. North Carolina Museum of Art
 - 20. North Carolina Museum of Natural Sciences
 - 21. Museum of History
 - 22. North Carolina State Fairgrounds
 - 23. Marbles Children's Museum
 - 24. Shop Local Raleigh
 - 25. Raleigh Convention Center
 - 26. Raleigh Convention Center Commission
 - 27. Conference Table
 - 28. North Carolina Football Club (NCFC)
 - 29. Cary Sports Alliance
 - 30. Cary Chamber of Commerce
 - 31. Arts and Public Art
 - 32. GRCVB Steering Committee
 - 33. Blue Ribbon Task Force
 - 34. Customer Advisory Board
 - Over 50 additional individual meetings and phone calls

Stakeholder Survey Results

Quantitative Results

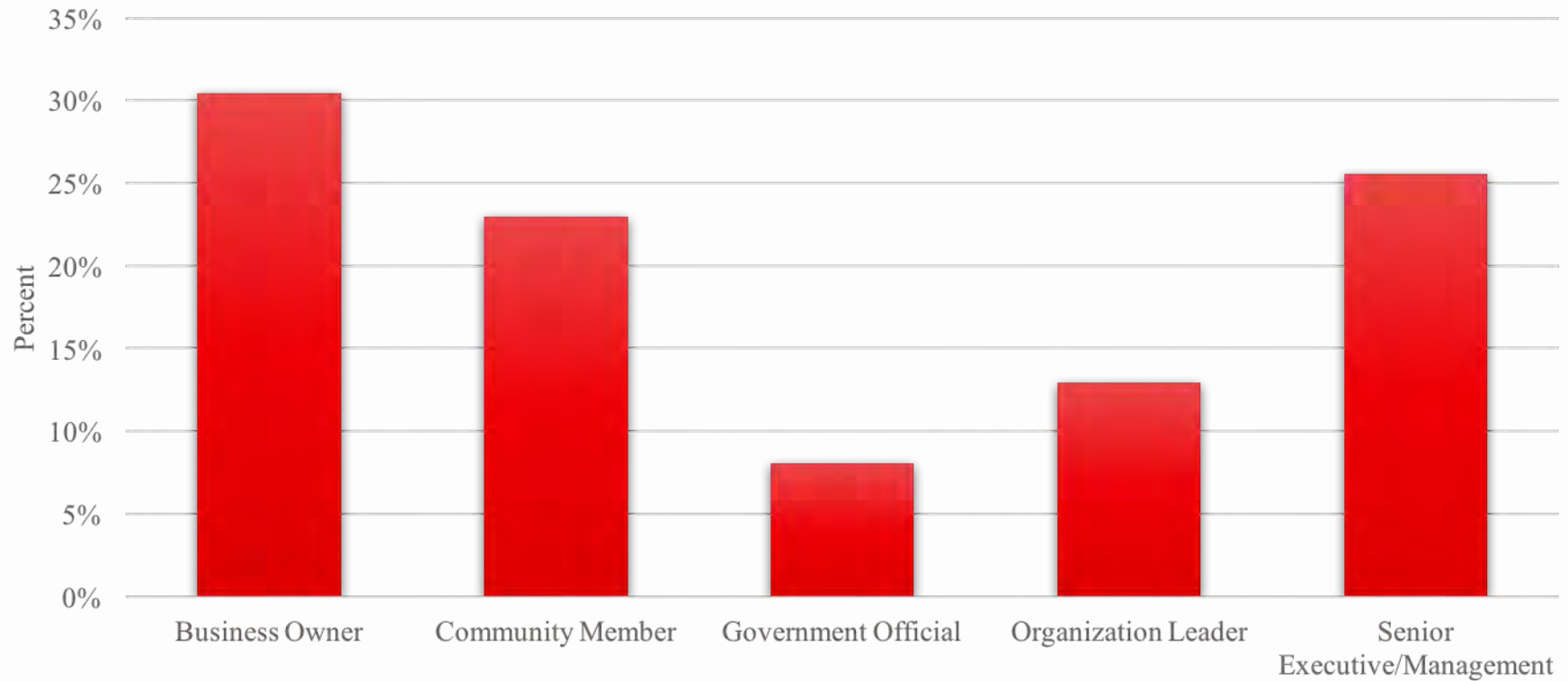
November 17, 2017



Stakeholder Respondents



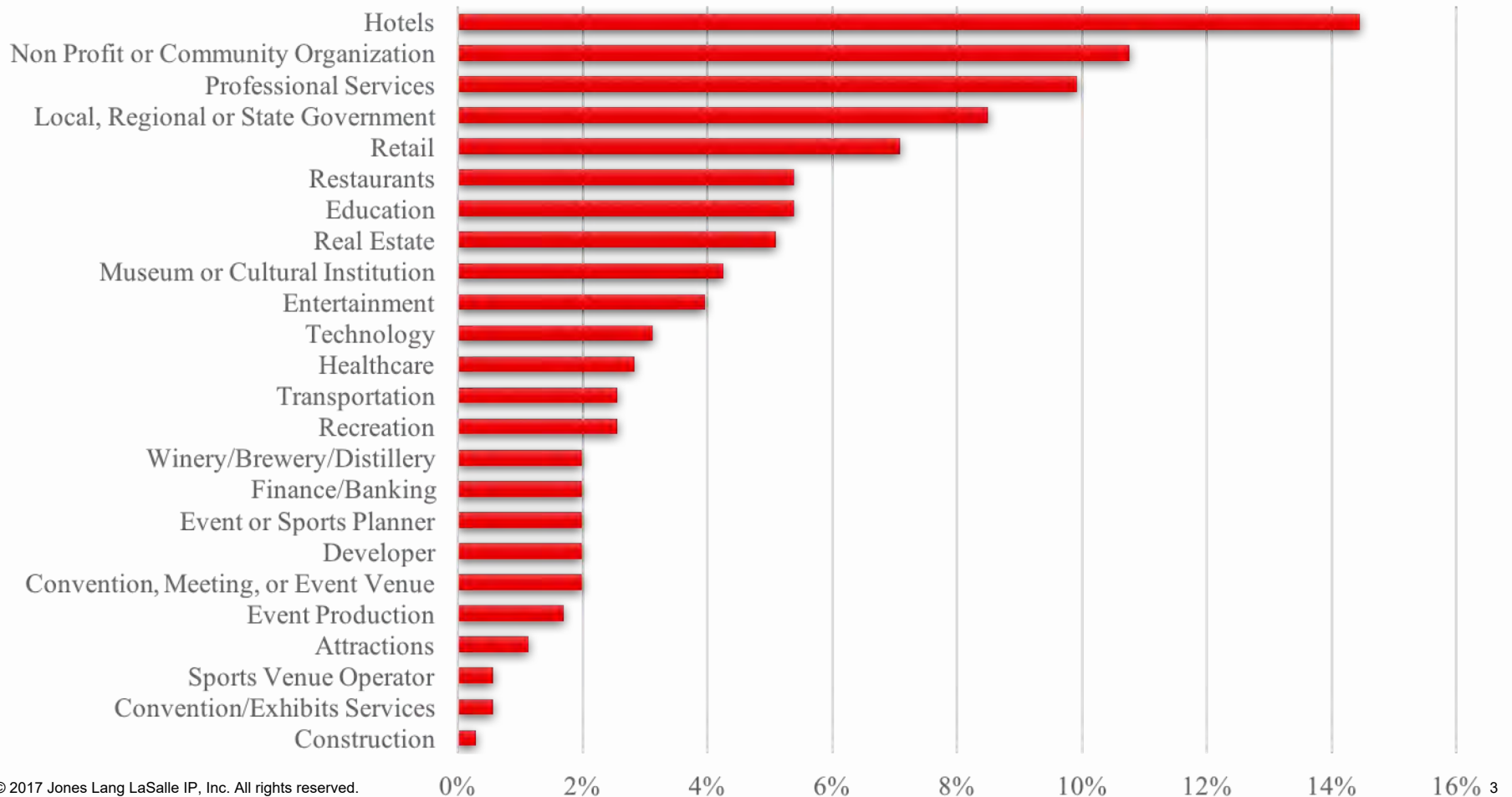
I am a:



Respondent Industry



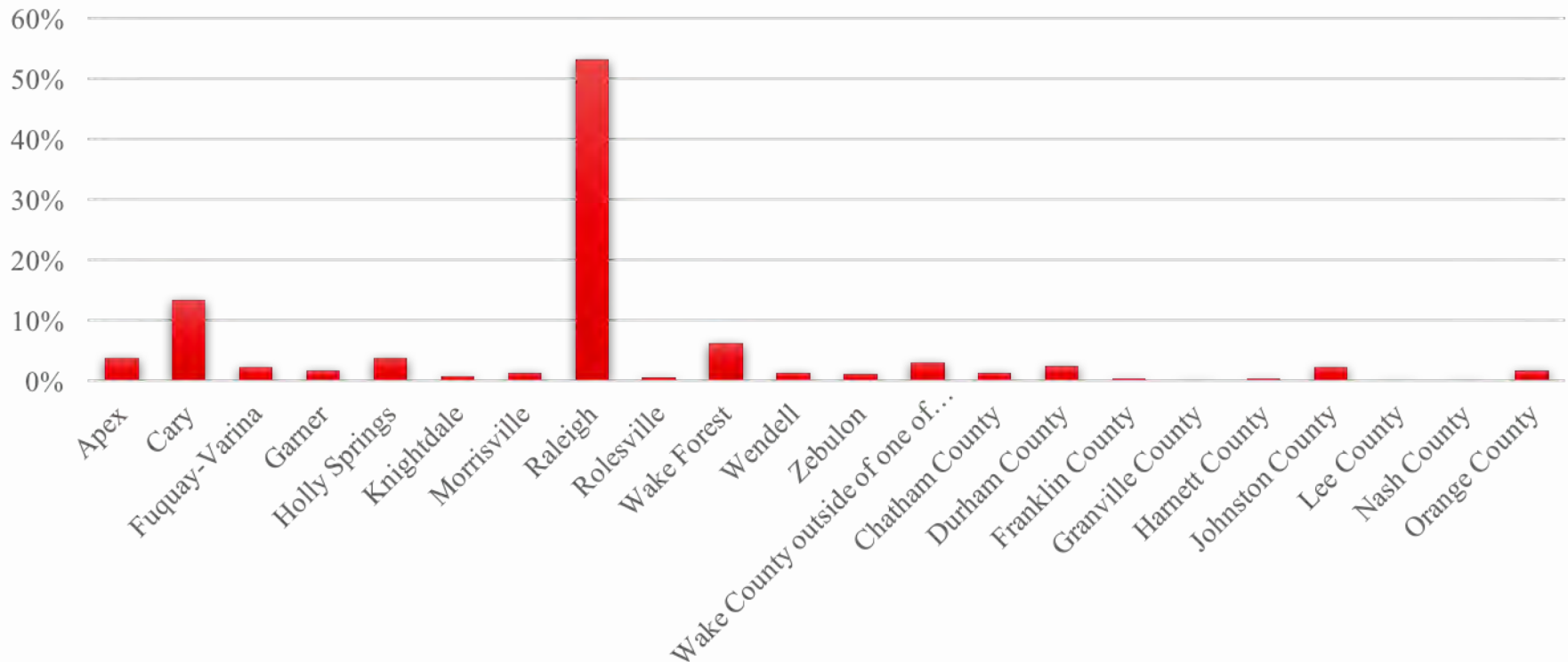
Please select the industry that best matches your business. Please choose only one.



Stakeholders' Residence



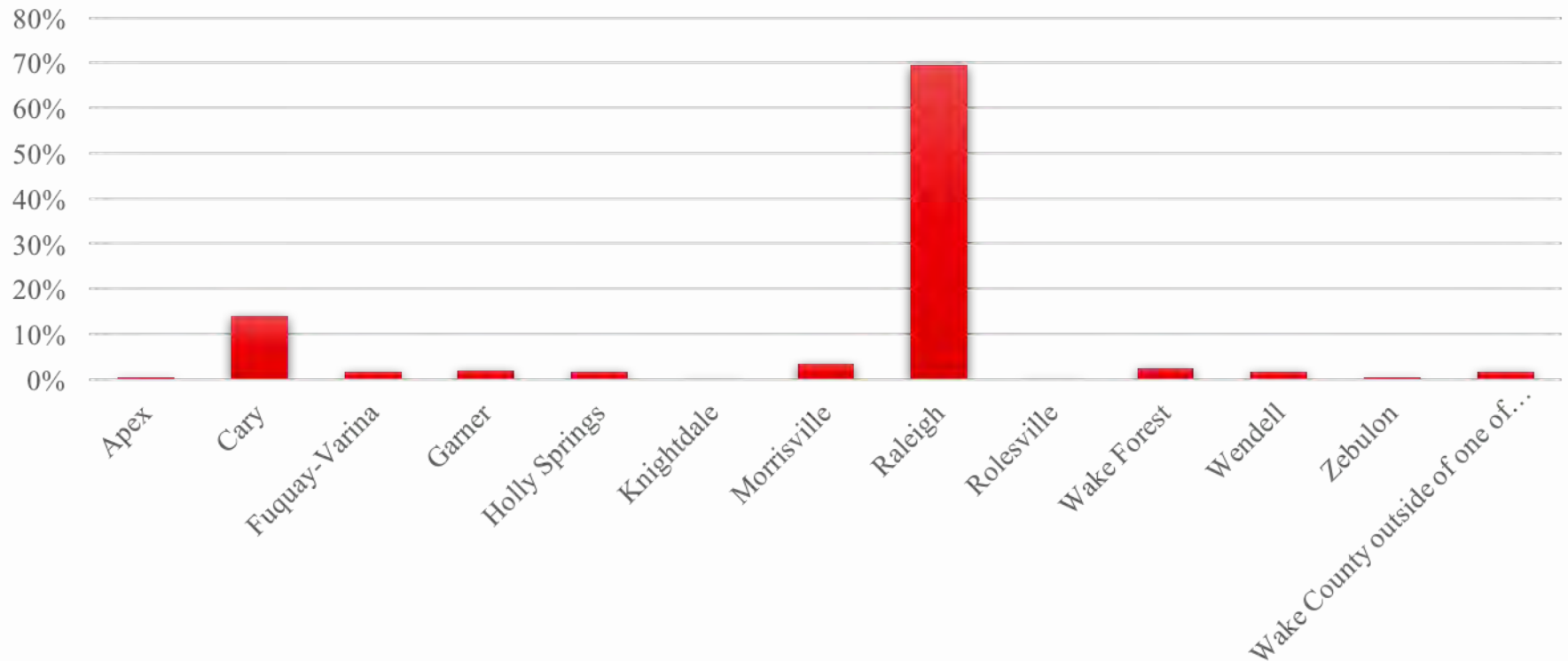
Please select the community where you live:



Stakeholders Work Place



Please select the community where you work:



Strengths



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

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.)

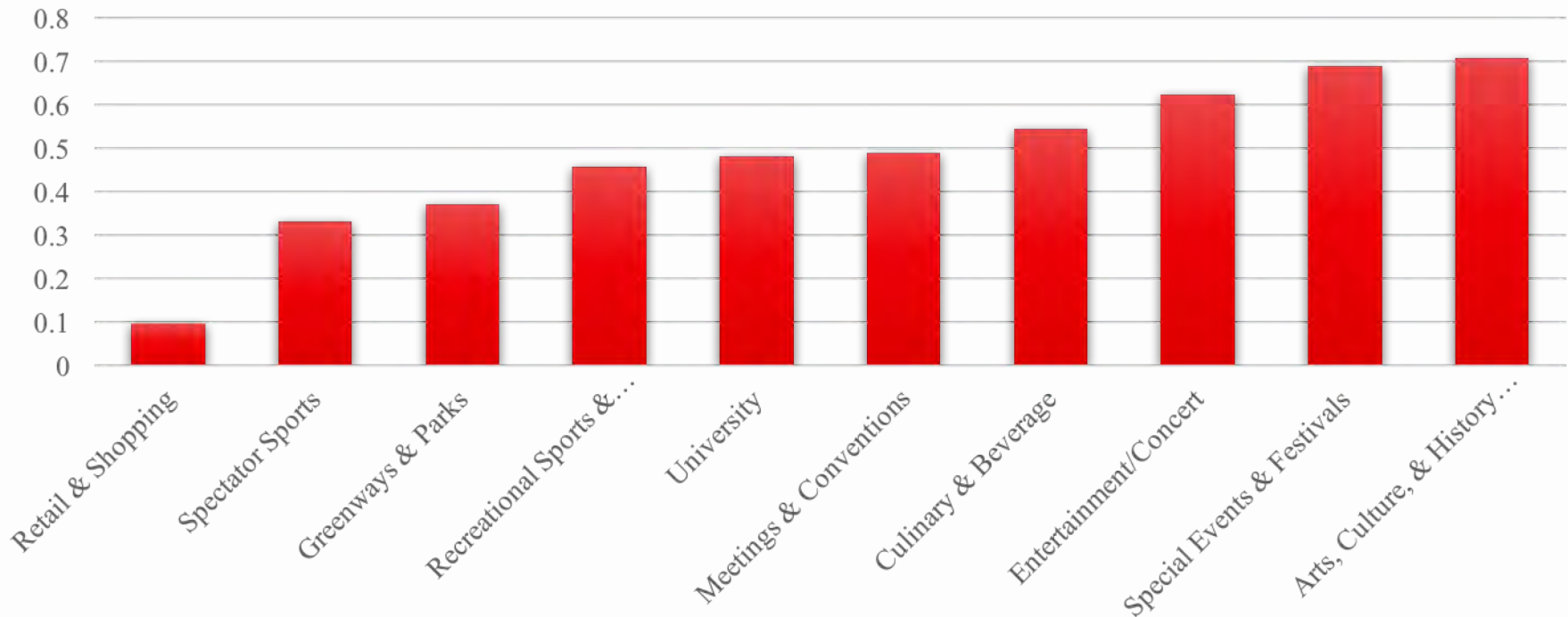
Top Opportunities

- 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

Tourism Drivers



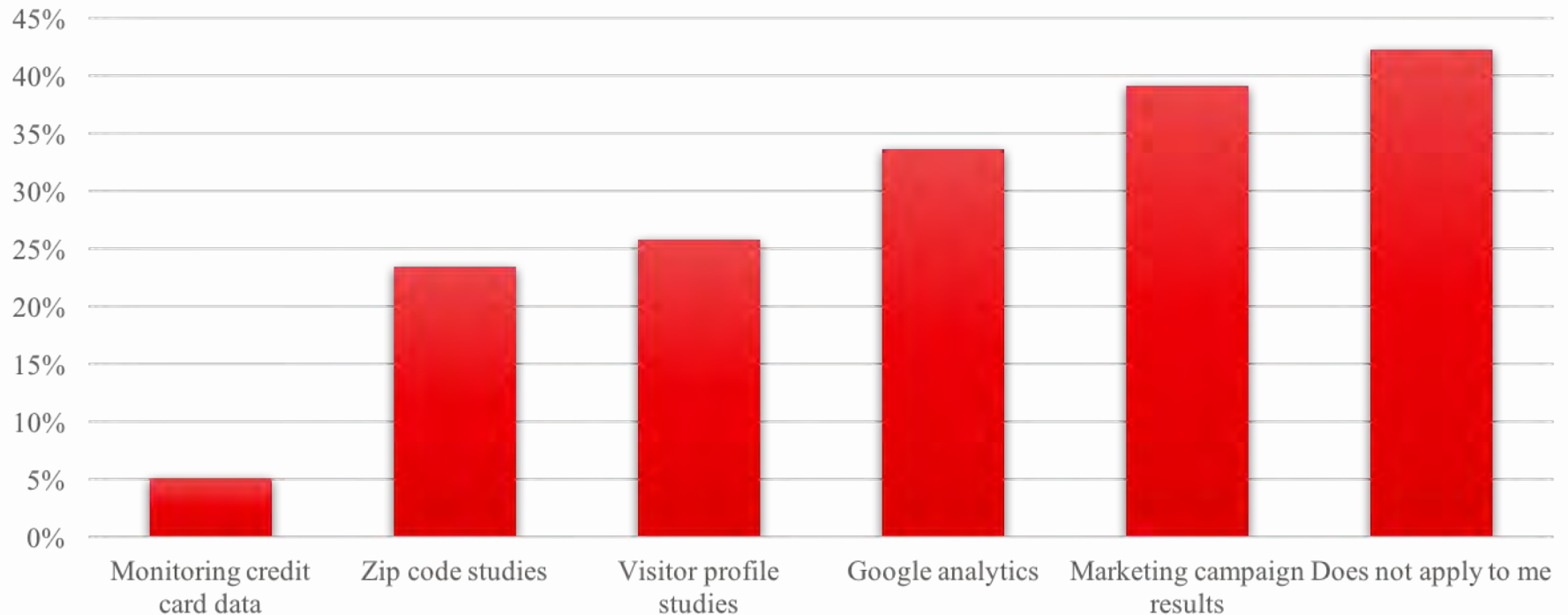
The following list includes various drivers of tourism to Wake County. Based on your perceptions of their appeal to potential visitors, please select what you feel are the top five drivers.



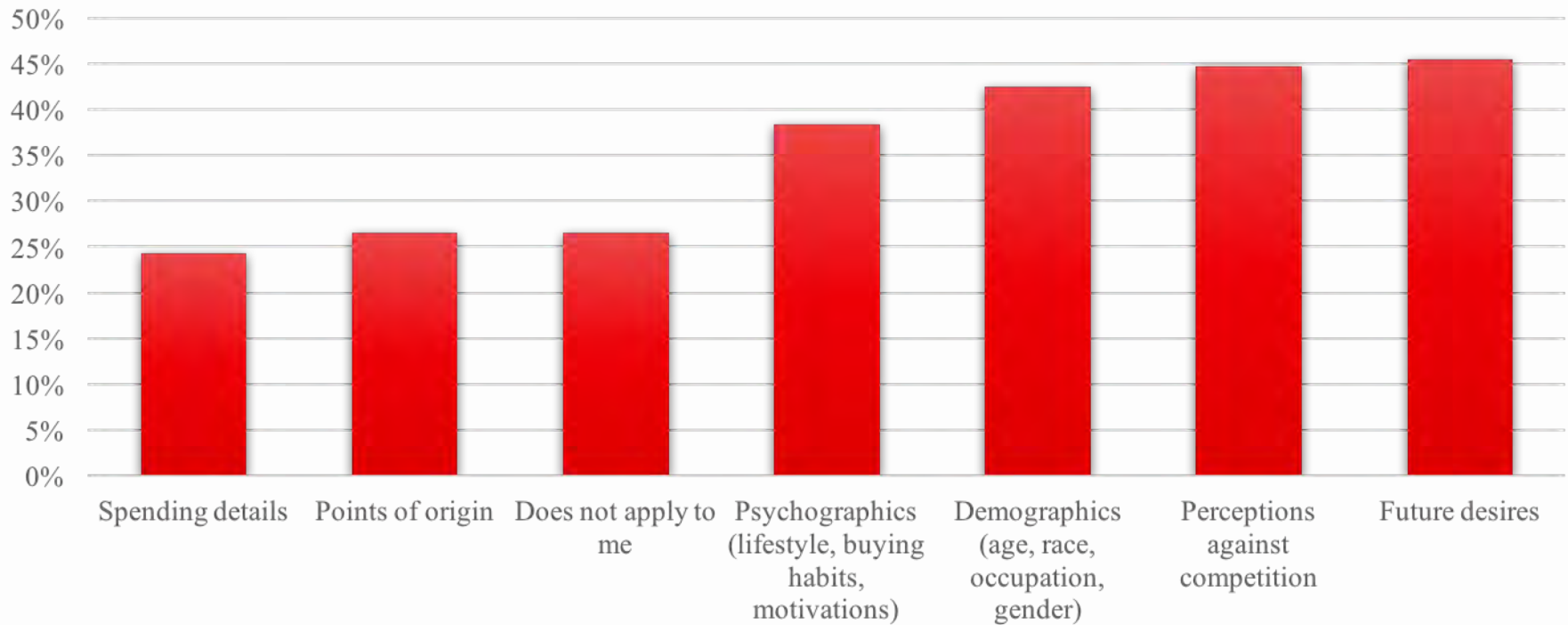
Stakeholder Research



What research do you conduct to learn more about your customers? (Select all that apply)



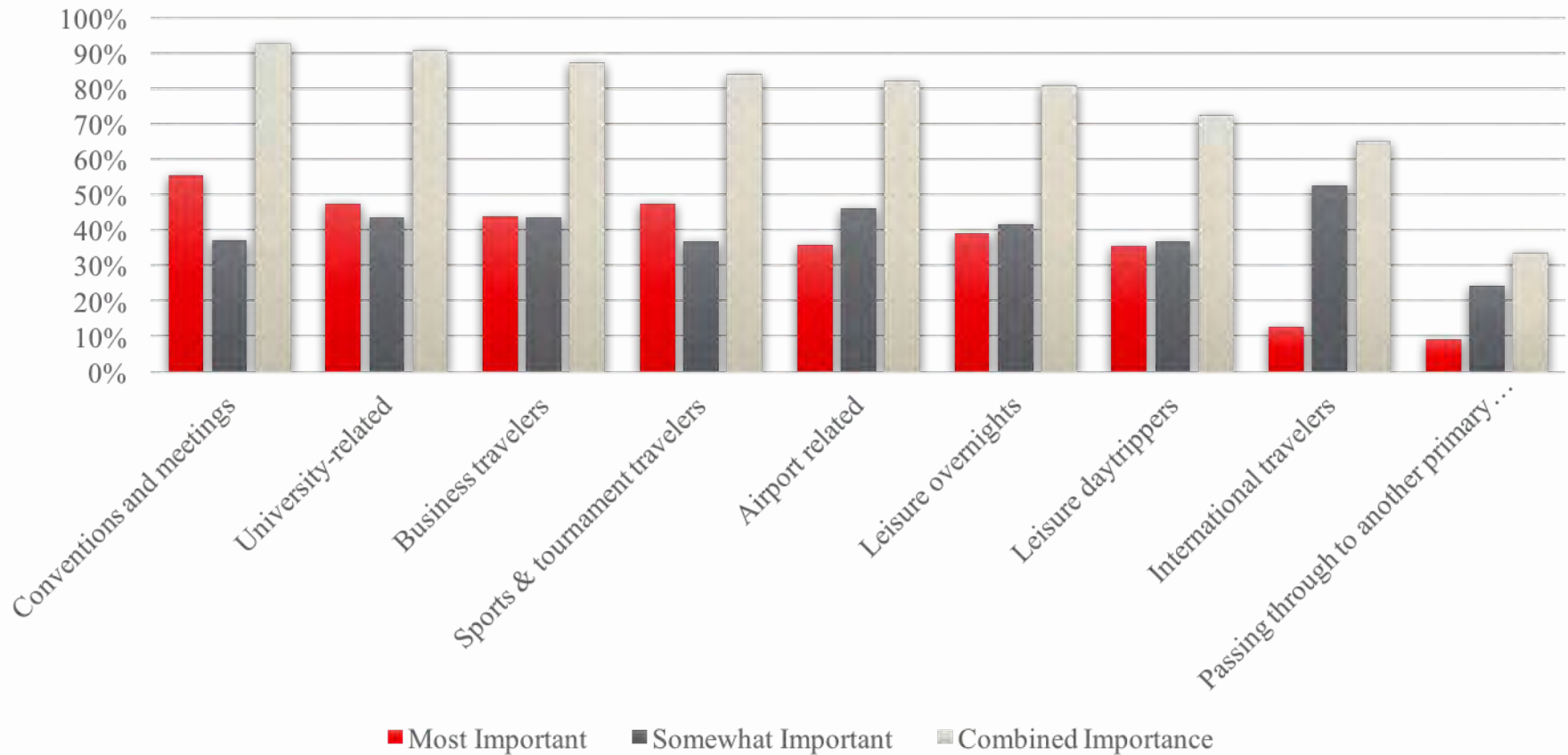
What more do you want to know about your customers? (Select all that apply)



Perceived Visitor Markets



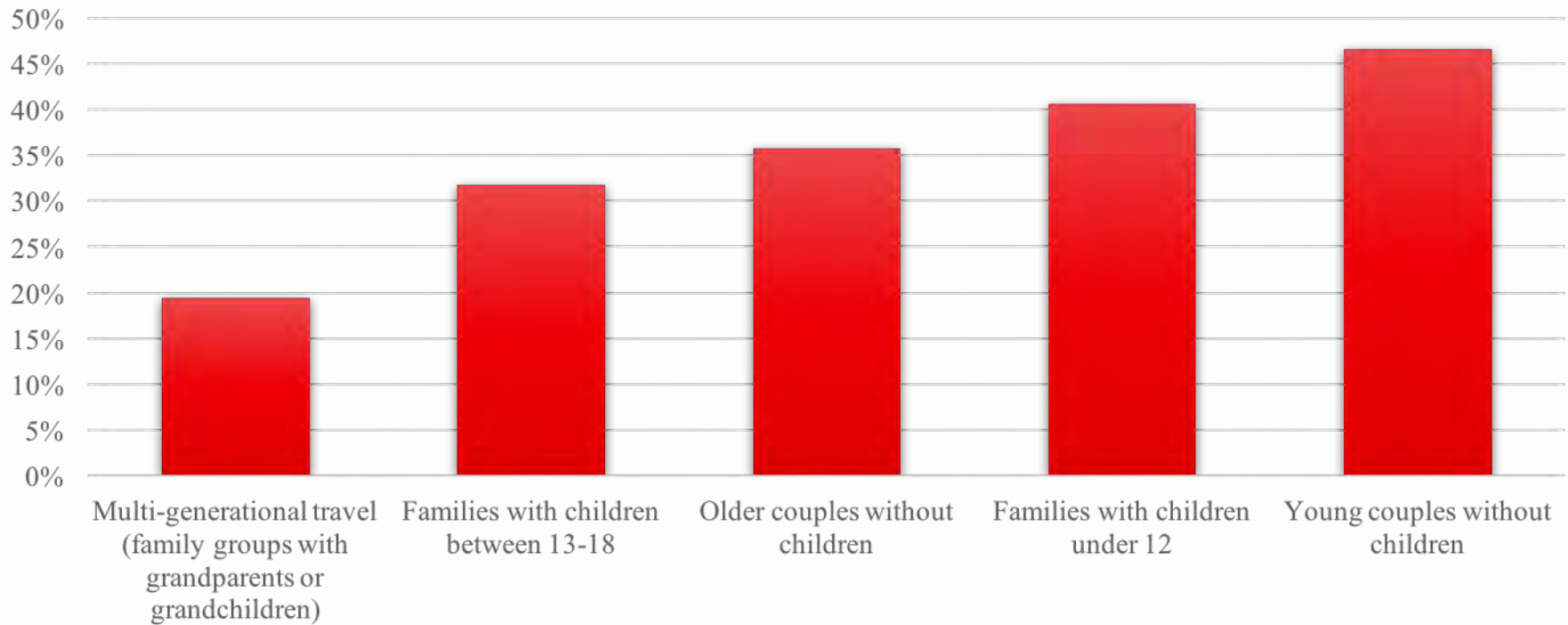
Based on your perceptions, please rate the importance of each of the following visitor markets for Wake County:



Visitor Demographics



What are your perceptions of the top demographics of leisure travelers that come to Wake County? Please choose the top two.



Additional Visitor Markets



Visitor Markets

- Millennials
- Hipsters
- Conventions
- Business travelers
- International travelers
- Adventure and recreation enthusiasts
- Arts and cultural travelers
- Music and festival travelers
- Continuing education conferences
- LGBTQ
- Faith communities
- Seasonal (snow birds)
- Military

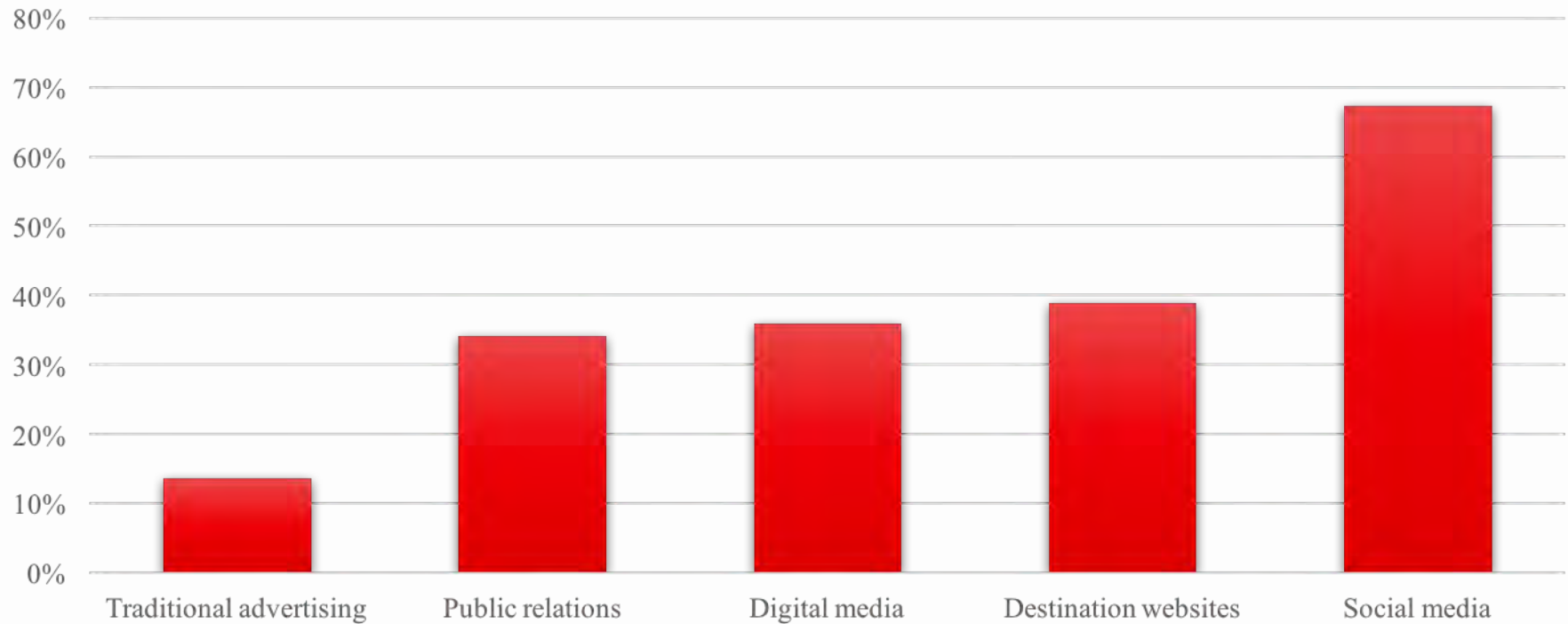
Geographic Markets

- Austin, TX
- Seattle, WA
- Portland, OR
- Santa Fe, NM
- Asheville, NC
- Alexandria, VA
- Salt Lake City, UT
- Washington, DC
- Greenville, SC
- Denver, CO
- Atlanta, GA
- Nashville, TN
- Columbus, OH
- Northeast
- California
- South America
- 5 hour radius

Marketing Vehicles



What do you think are the most effective marketing vehicles for increasing Wake County visitor activity? Please choose two.



Investment Priorities



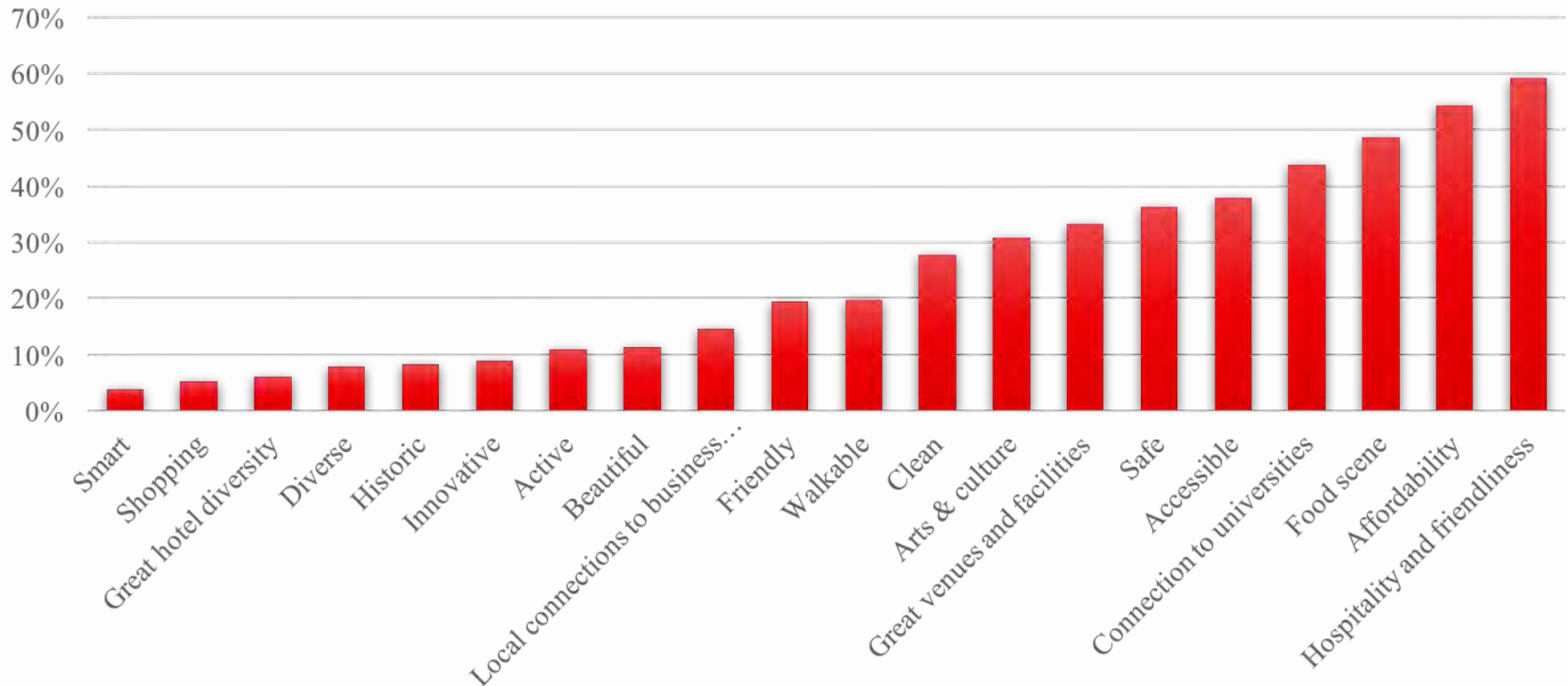
What do you feel should be Wake County's future investment priorities for continuing the tourism industry's positive momentum and attracting more visitors? Please select your top five.



Meetings & Conventions



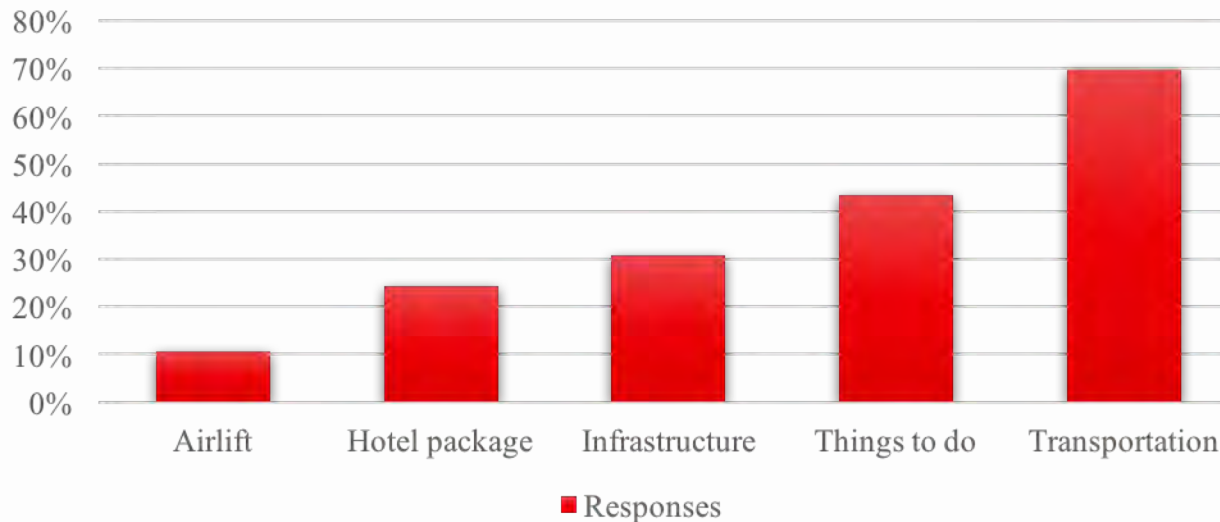
What are the attributes of Wake County as a meetings and conventions destination that make it a good place for attendees?
Pick your top five.



Meetings & Conventions



What real or perceived issues do you feel make Raleigh and Wake County less appealing for potential attendees of meetings and conventions coming to our County?
Please pick the top two in your opinion.



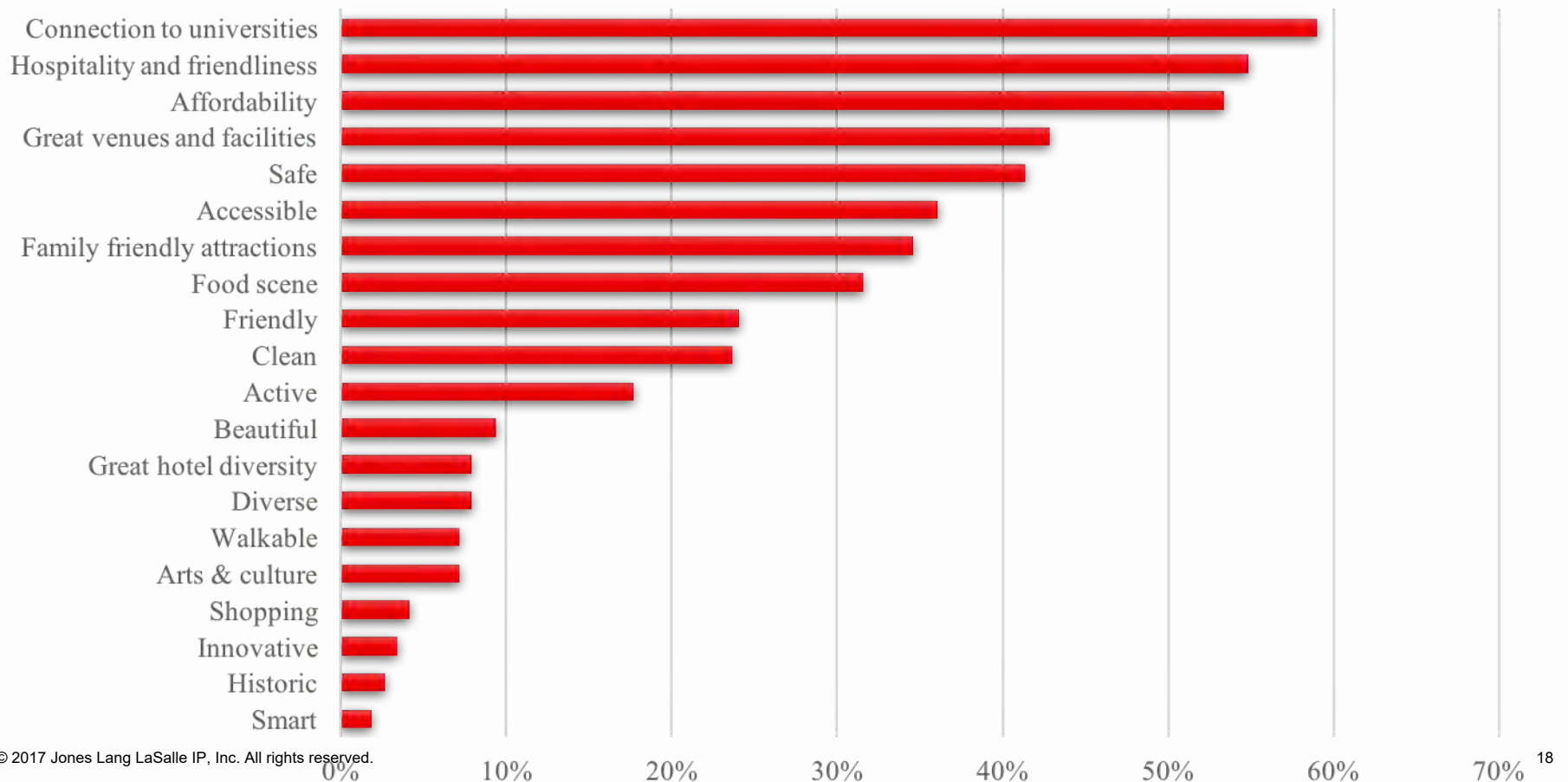
Other Comments:

HB2 & perception of other political issues/practices

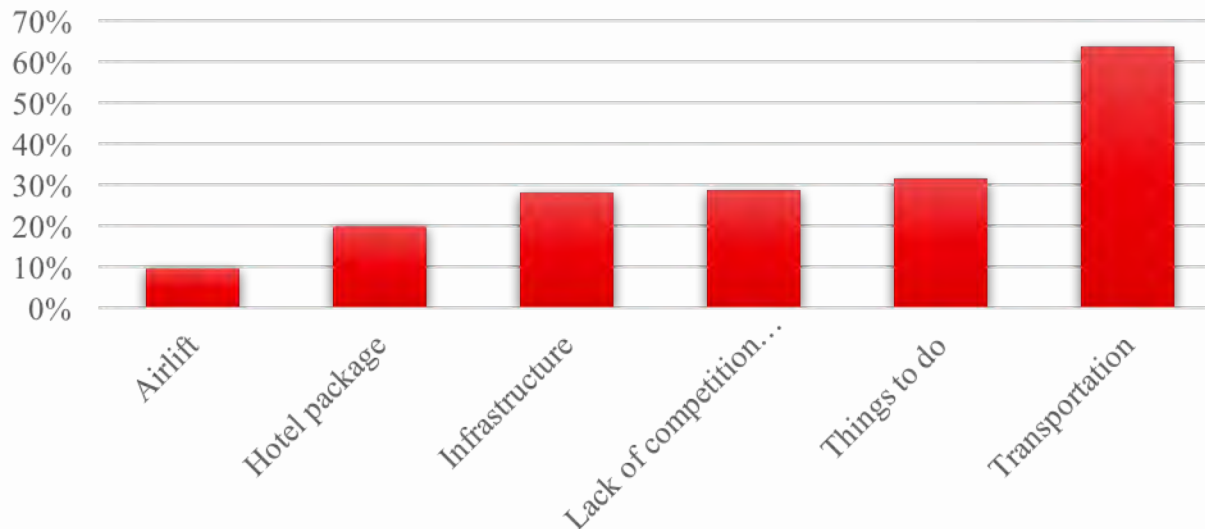
Brand appeal

Downtown scene

What are the attributes of Raleigh and Wake County as a sports destination that make it a good place for visitors? Pick your top five.



What real or perceived issues do you feel make Raleigh and Wake County less appealing for potential attendees of sporting events/tournaments coming to our County?
Please pick the top two in your opinion.



Other Comments:

Lack of professional venues downtown

Critical mass of fields

HB2 & perception of other political issues/practices

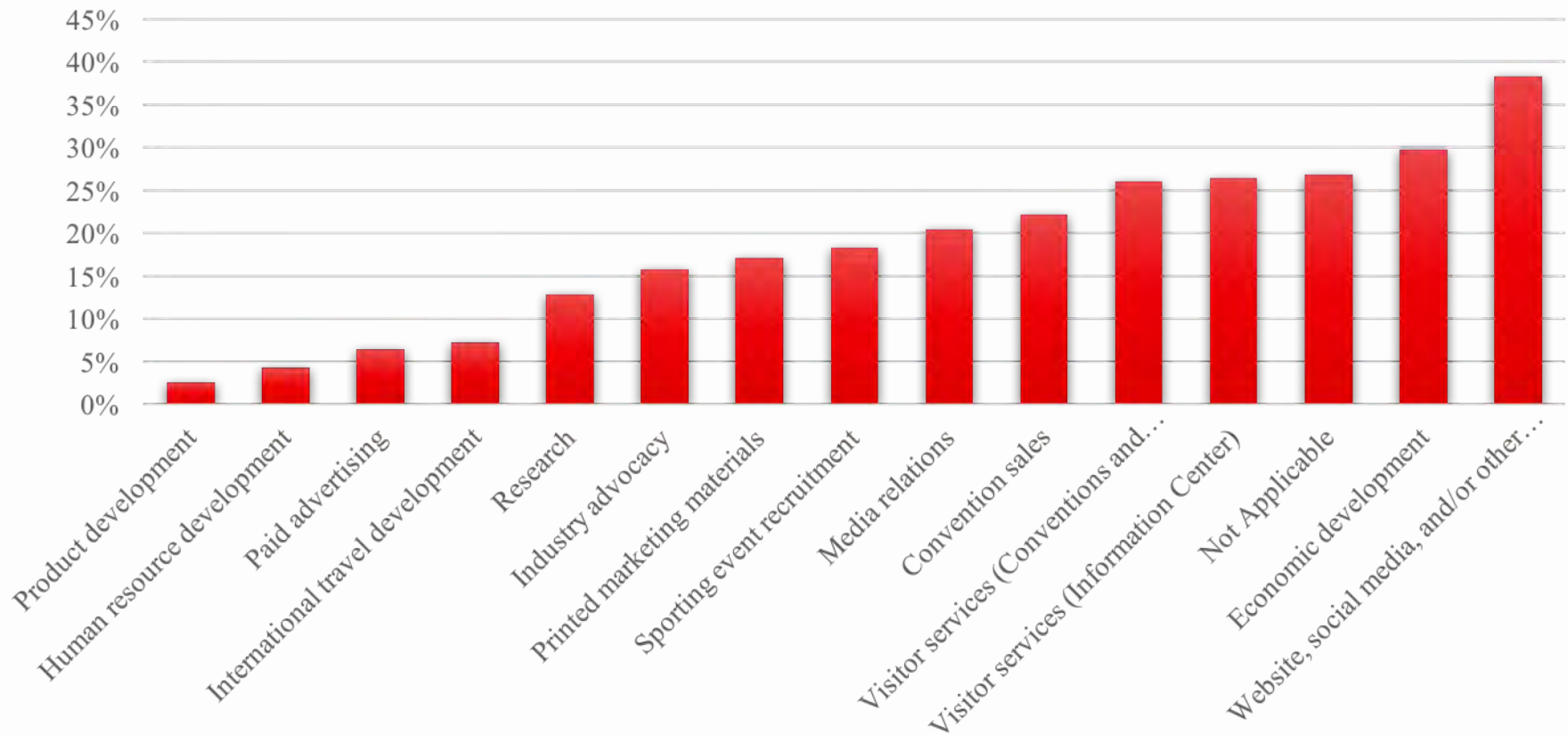
Brand appeal

Downtown scene

GRCVB Results



Please select any GRCVB program that has directly benefited your business or organization:





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Meeting Planner Survey

Draft Results Review

May 2018



Survey Overview



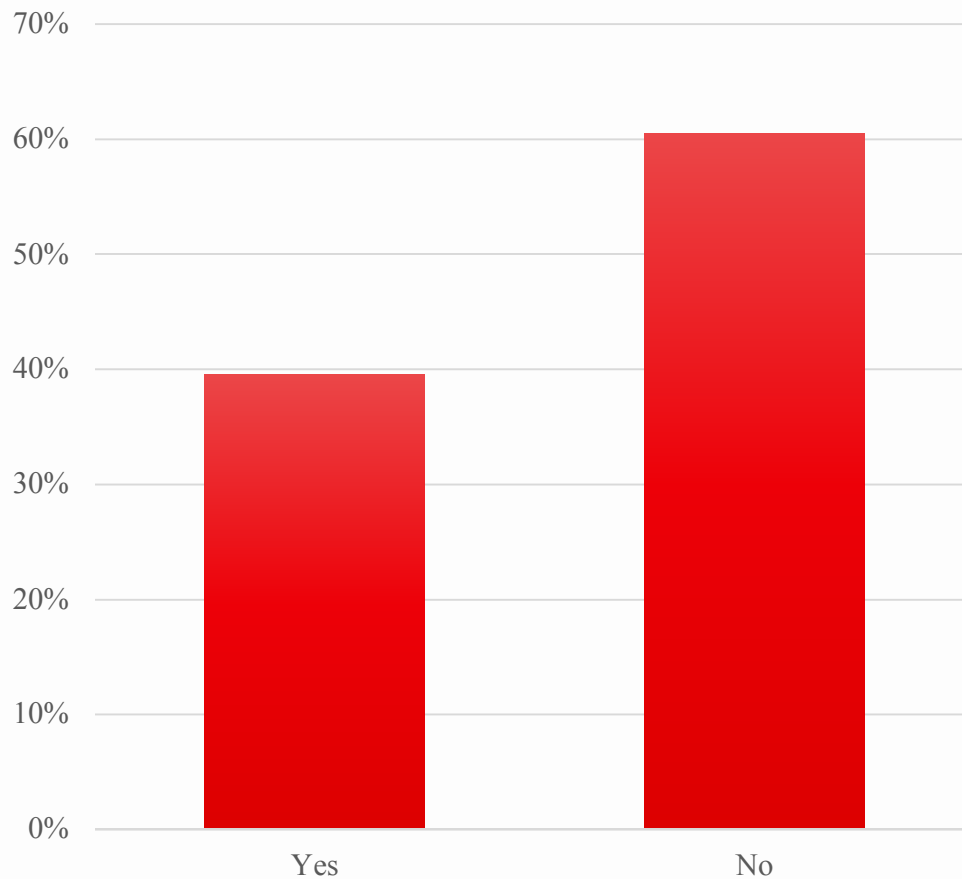
The Raleigh Meeting Planner Survey:

- Distributed to
 - 977 GRCVB contacts
 - 348 JLL contacts
- Email performance
 - 32% open rate
 - 10% click through rate
- Completed by 81 respondents
 - Average completion time 16 minutes

Raleigh Experience



Has your group ever met in Raleigh?



What comes to mind when you think of Raleigh?

Green Higher Downtown Progressive Capital Attendees Small Town
Tier City Research Triangle Duke University
North Carolina Young Raleigh Great Place
Small City Great Food Fun Center Southern Hospitality
Warmth Destination Traffic

Recent & Planned Destinations



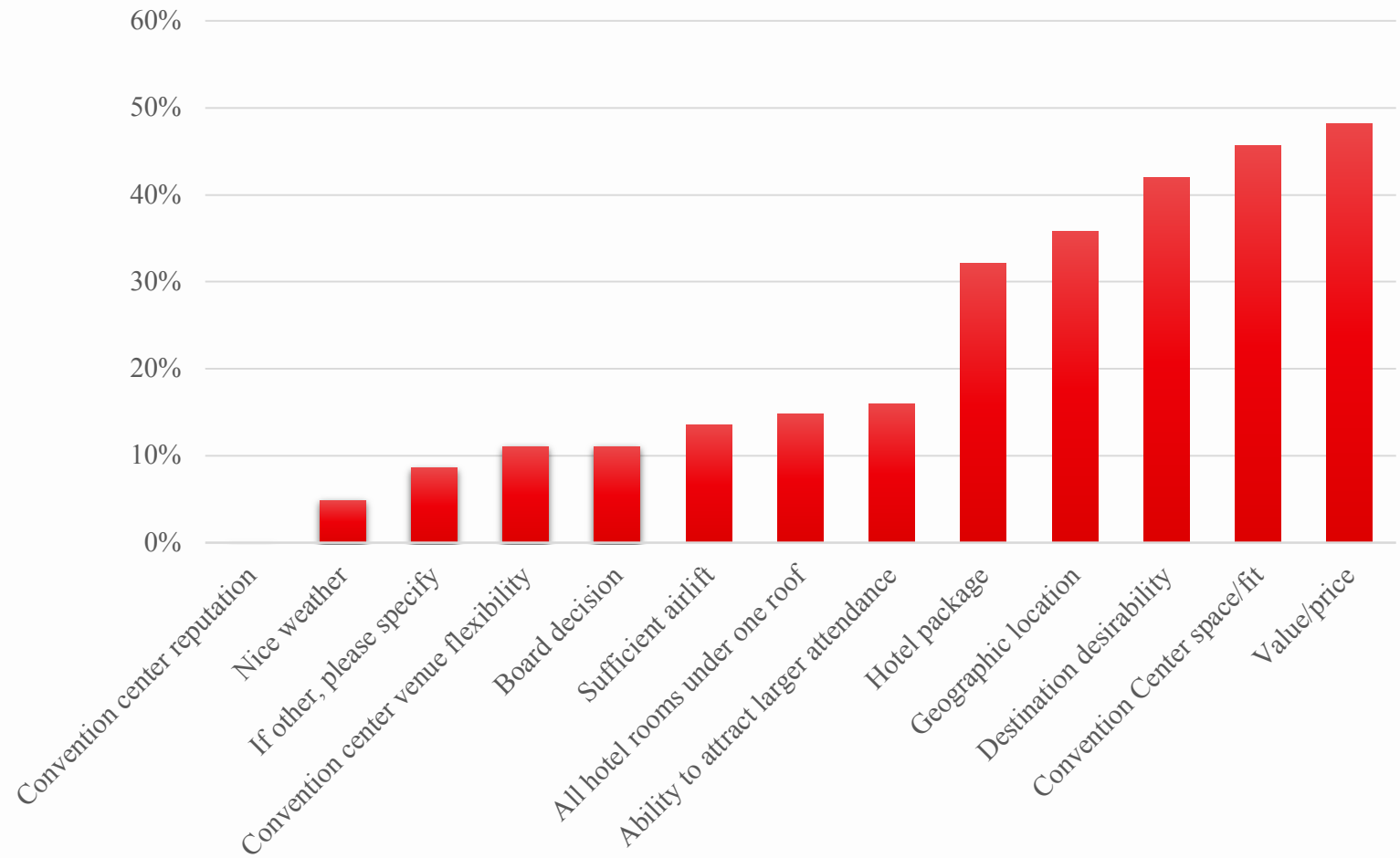
Three most recent destinations:

- Orlando
- Chicago
- New Orleans
- Nashville
- Atlanta
- Boston

Of these cities mentioned in the prior two questions, please select the top three reasons why these cities were chosen:

Future destinations

- DC
- Chicago
- Nashville
- New Orleans
- Boston



Initial Raleigh Comparison



Raleigh's appeal

- 39% said it was less appealing than their chosen destinations
- 27% said it was about the same
- 22% said they didn't know enough
- 11% it was more appealing

Reasons for choosing 'less appealing'

“

Most specifically, the size of convention space, hotel availability and airlift.

A city that should have been the current Charlotte. Charlotte is more aggressive with diverse events

Not well known

Limited **hotel space** in same venue

Airline lift into the city, availability of **larger hotel room blocks**

The only reason we don't consider Raleigh for our bigger meetings is **lack of space and hotels.**

The convention center is **not linked to a large hotel**, that can hold most of the attendees and it's space is not flexible enough for our meetings.

Availability of space; Would need multiple hotels; Air lift

”

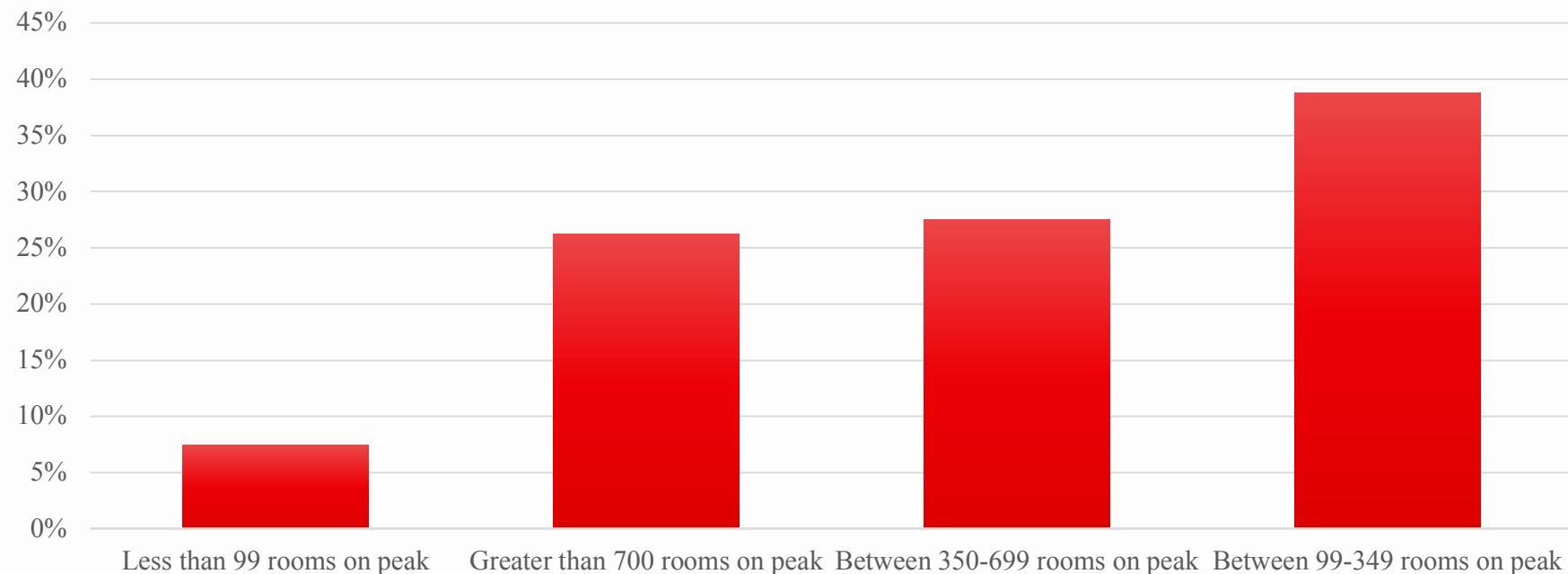
Trends



When asked about their largest annual event, meeting planners said:

- Attendance is increasing – 54%
- Attendance is flat – 40%
- Event duration is typically 3-4 days – 63%

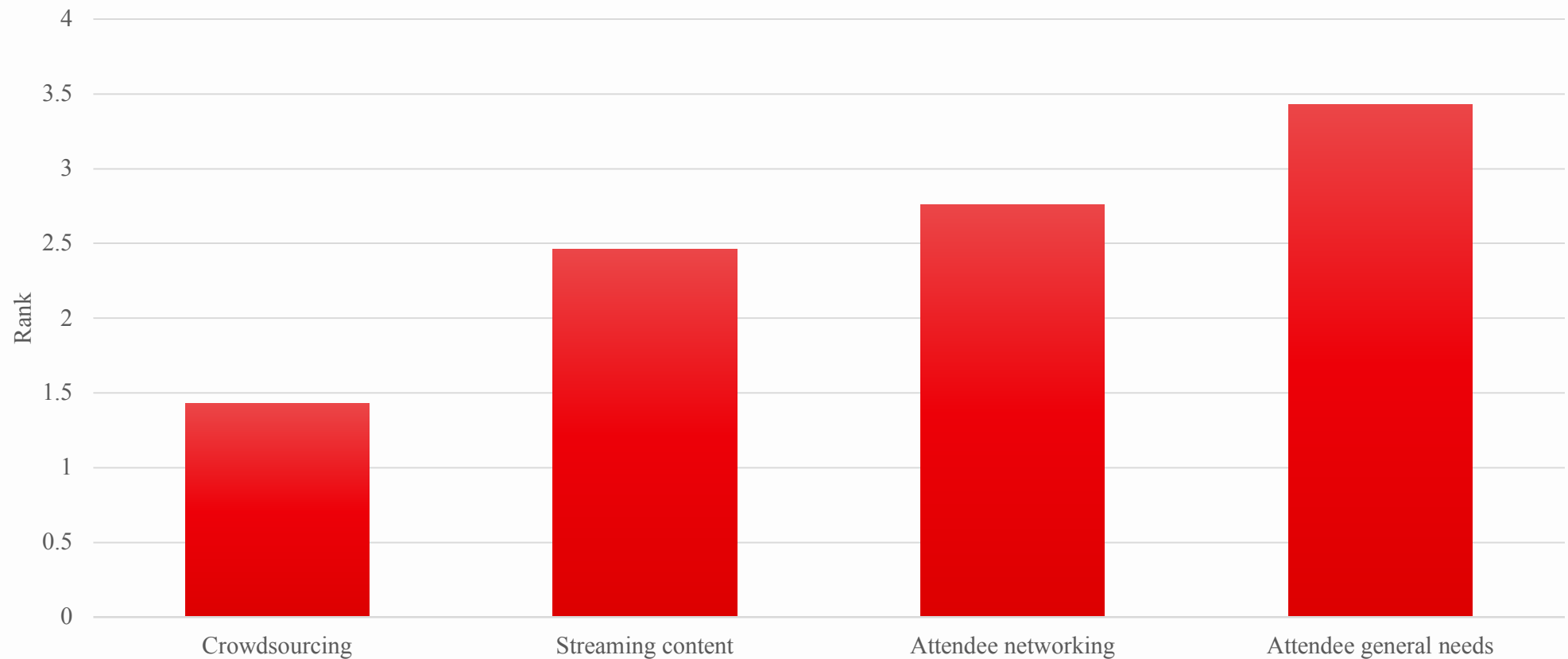
Please give us an overview of your largest annual meeting or the meeting that you feel would fit best in Raleigh Convention Center in terms of peak hotel rooms required:



Trends



Please rank the following as the most important future uses of technology for your event with 1 being the most important and 4 being the least important.

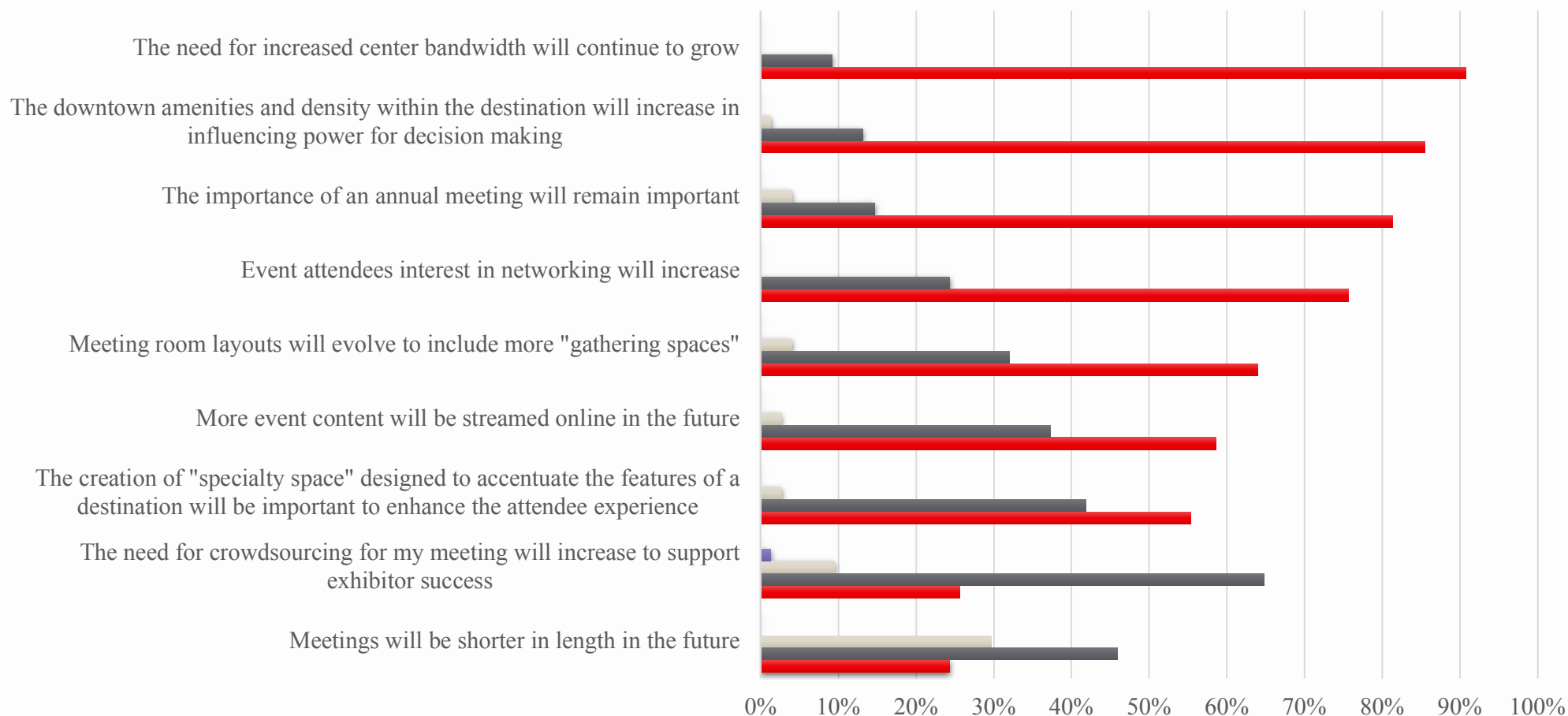


Trends



Overview of convention center trends. Please check whether you agree or disagree with the following trends:

Disagree Neither Agree nor Disagree Agree



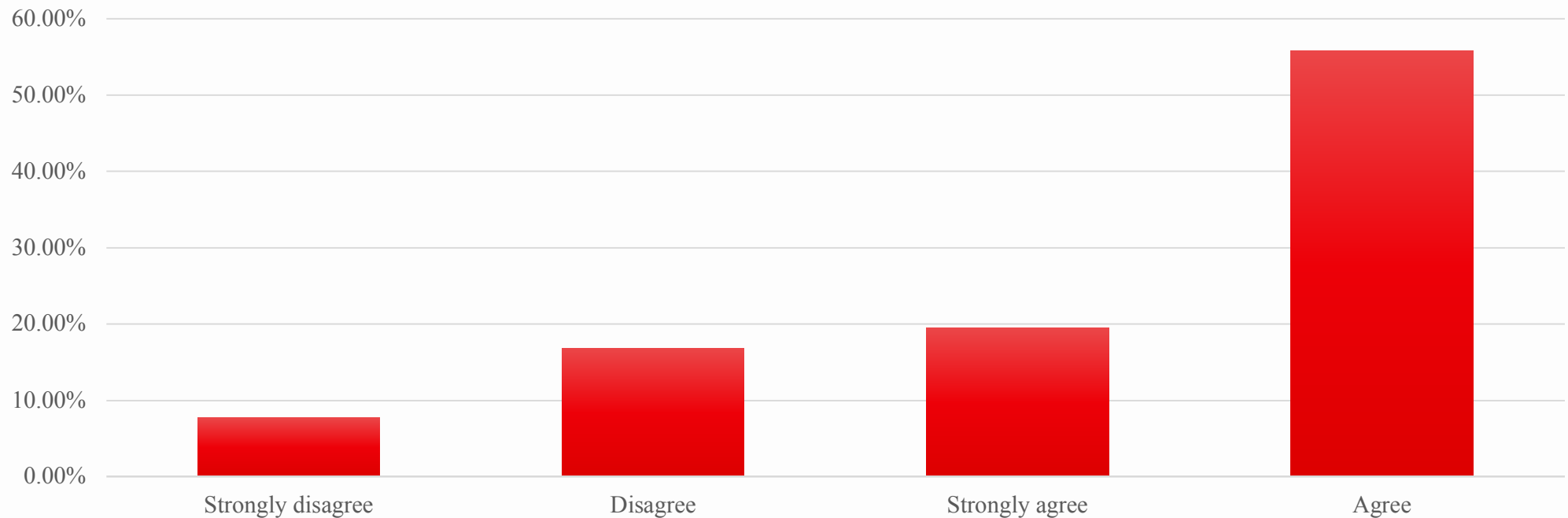
RCC Responses



When asked about the RCC, meeting planners said:

- The current flexibility works well - 79%
- The public spaces are effective for networking – 61%
- The bandwidth supports the meeting's needs - 55%

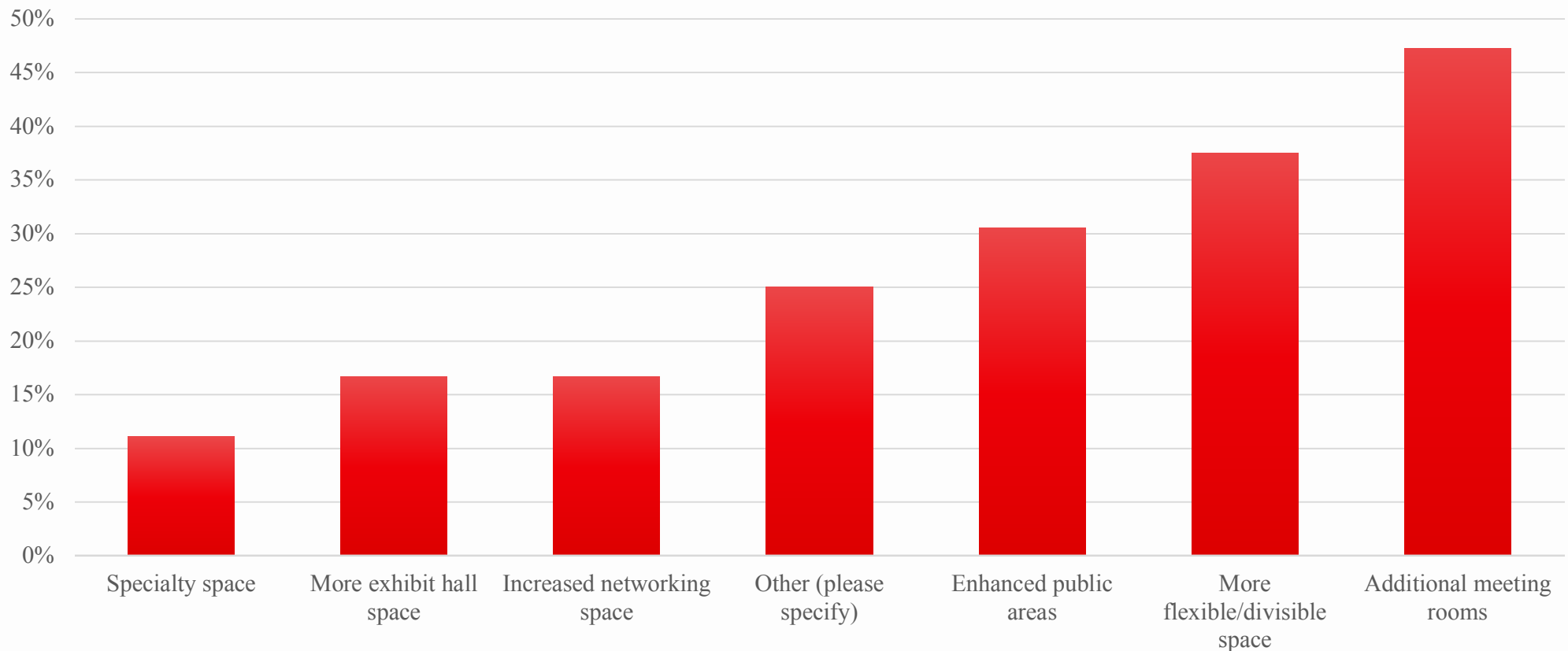
Overall, the RCC is sufficient for my event needs.



RCC Responses: Expansion



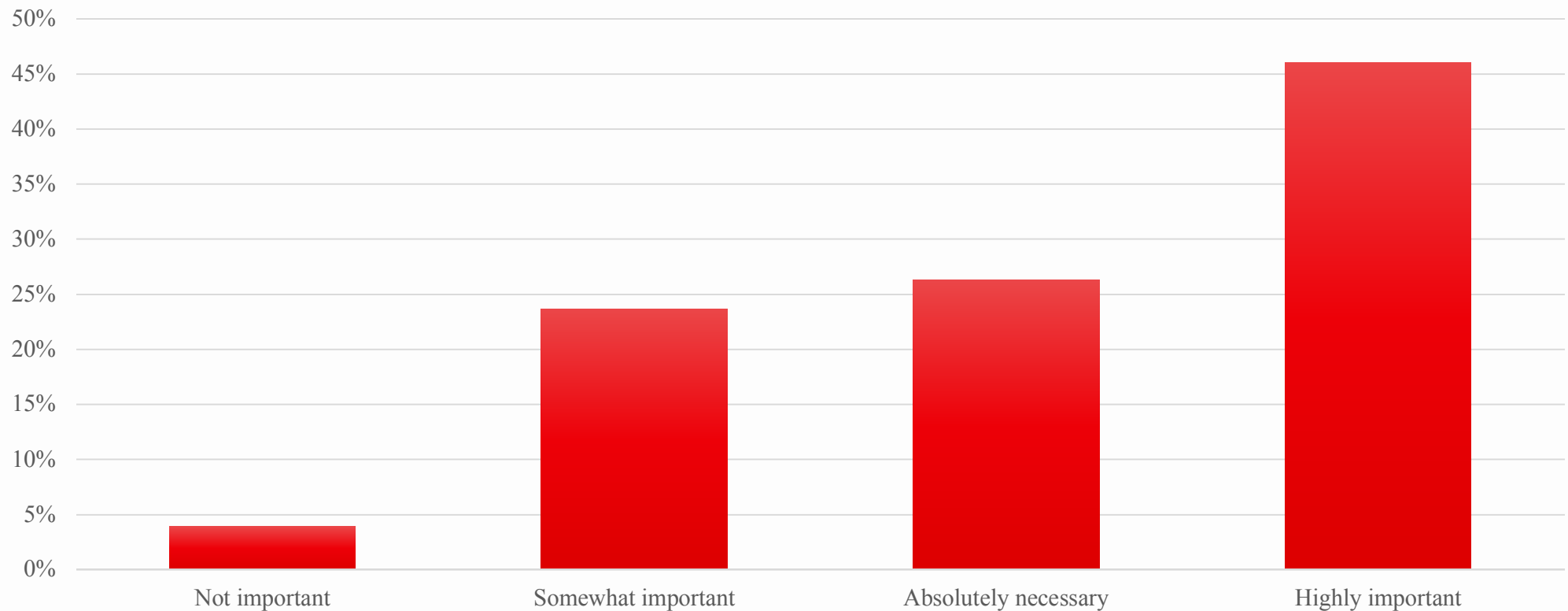
If the RCC were to consider future expansion, what would you like to see in the new space? Please check all that apply.



Hotel Package



How important is having a HQ hotel that is either attached to the convention center or connected via climate controlled skyway when selecting a market for your events?



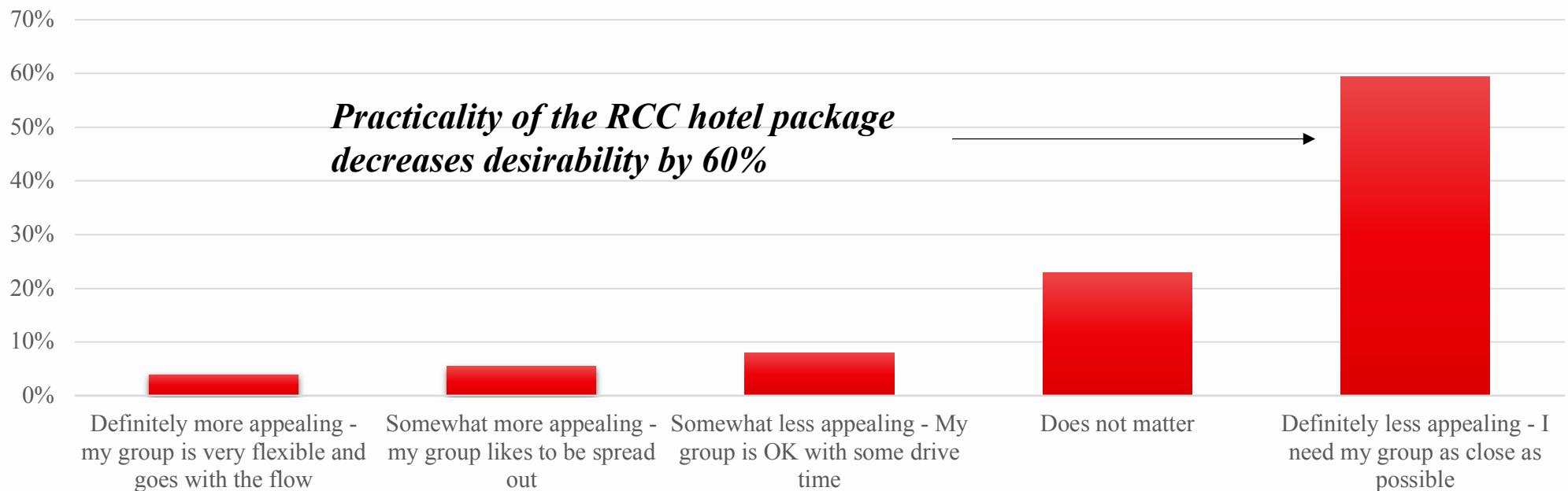
Hotel Package



When asked about hotel package and hotel needs, meeting planners said:

- The RCC's hotel package is sufficient – 75%
- The RCC's hotel package is not sufficient – 25%

If the hotel block required the use of the three anchor hotels within walking distance and additional overflow hotels within a two-mile drive of the RCC, how would Raleigh compare to other destination's you've recently considered?



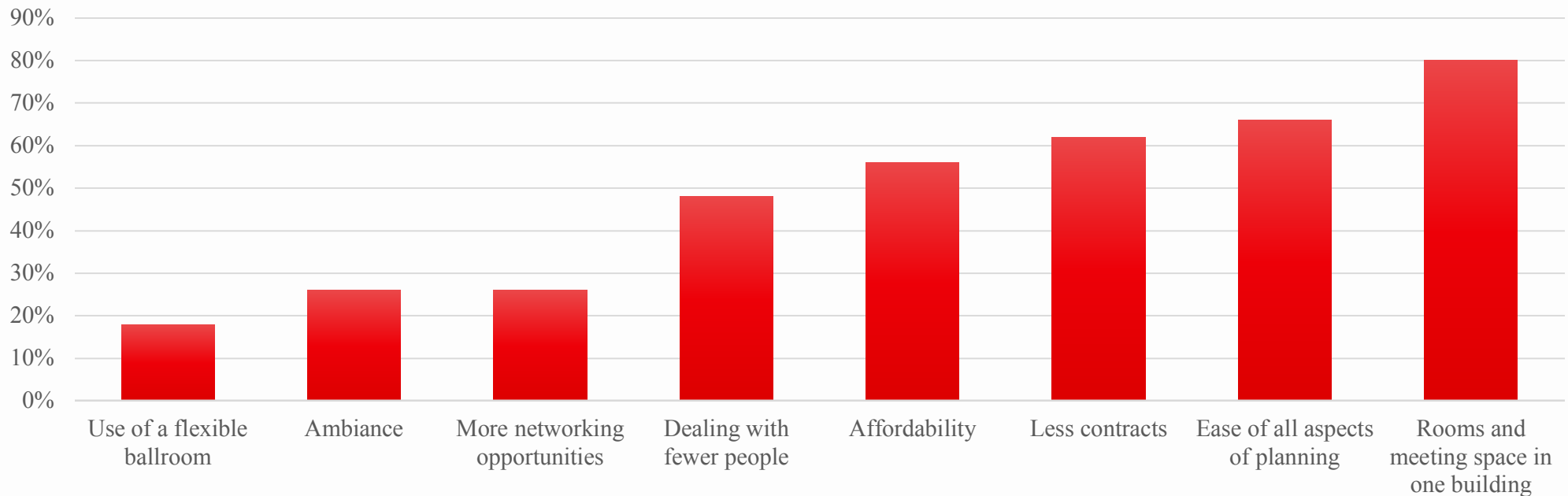
Hotel vs. Convention Center Experience



When asked about hotel experience, meeting planners said:

- They use both hotels and convention centers for meetings – 62%
- They use hotels only for their meetings – 32%
- Their experience in hotels is about the same as convention centers – 54%
- Their experience is better in hotels than convention centers – 43%

If your hotel experience has been better, please indicate which of these apply:



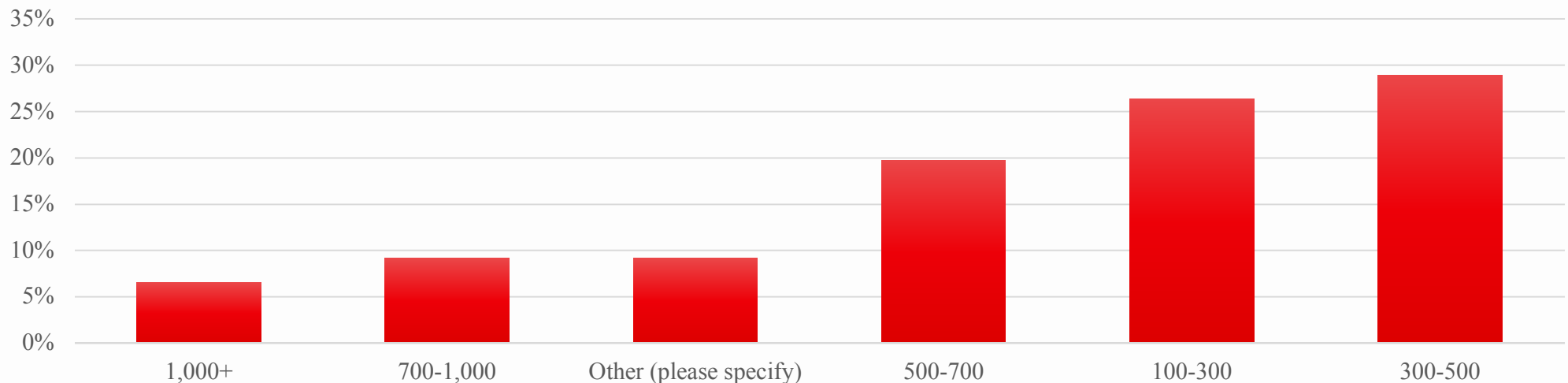
Hotel Package



When asked about desired hotel mix, meeting planners said:

- Desired brands in Raleigh would be – Hilton (46), Marriott (44), Hyatt (30), Omni (16), Westin (9)
- Full service to select service is desired at 80-20 to select service within a convention block
- If Raleigh added another HQ Hotel nearly 40% would be more likely to choose the RCC
 - Less than 10% said it would not change their decision
 - 52% said maybe

If you would prefer to see a new headquarters hotel adjacent to the RCC,
what is the minimum number of hotel rooms on peak that you would require
for a room block?



If Raleigh could do one thing ...



To improve as a convention destination what would it be?

“

Access from the airport to downtown and keep marketing downtown Raleigh as a destination, as the **city keeps improving** every year.

More full service 4 star plus hotels

Curated Raleigh "experiences"

Expand, **add breakout and exhibit** space

Improve **airlift** across the country

definitely get a HQ hotel that could house a significant room block

add Downtown hotels with more function space

Better Parking

Increase downtown residency to encourage more restaurants, etc. **open in evening and more foot traffic.**

Back in 2014, at 6:00 PM the downtown was a ghost town on weekdays. Few restaurants open late, the only CVS closed. The **downtown needs to be more attractive** for convention attendees.

Add a large hotel

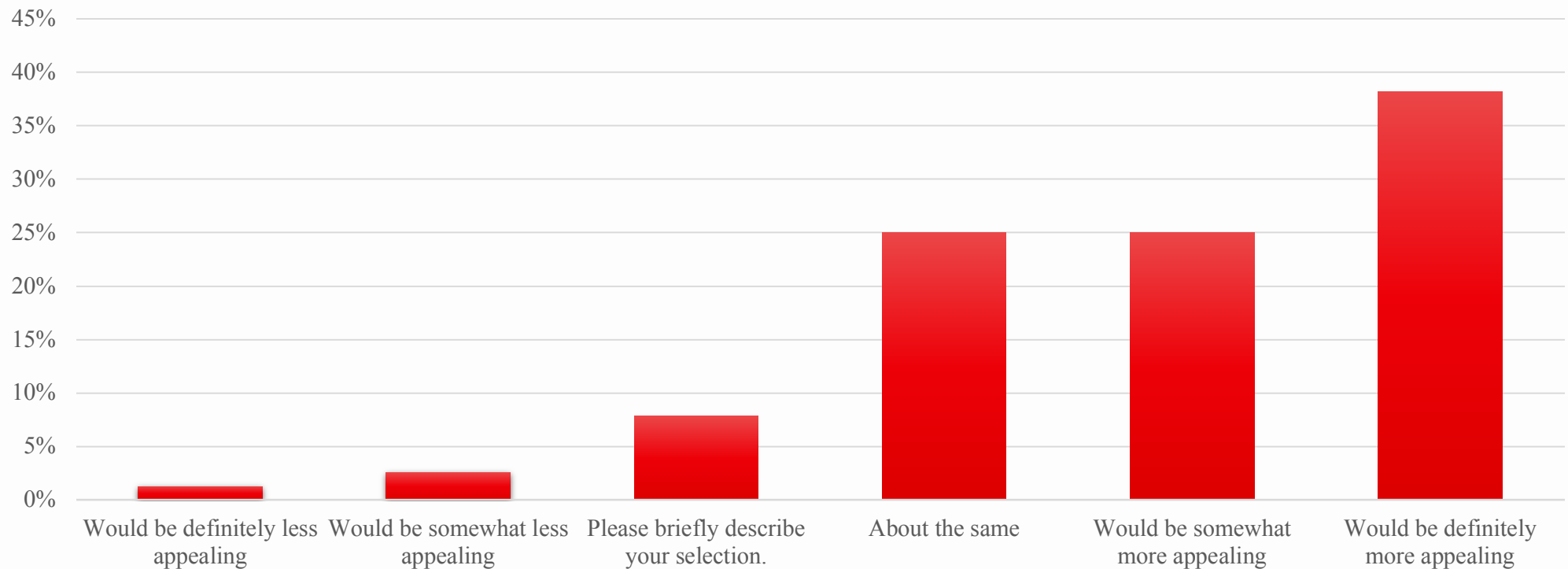
Better and more large hotels
(last time I saw the Sheraton it looked bad)

”

If Raleigh did those things...



Assuming Raleigh and the RCC responds to most if not all of the issues that you identified as important for your group, how would you again compare Raleigh as an overall destination relative to the cities that typically host your event?



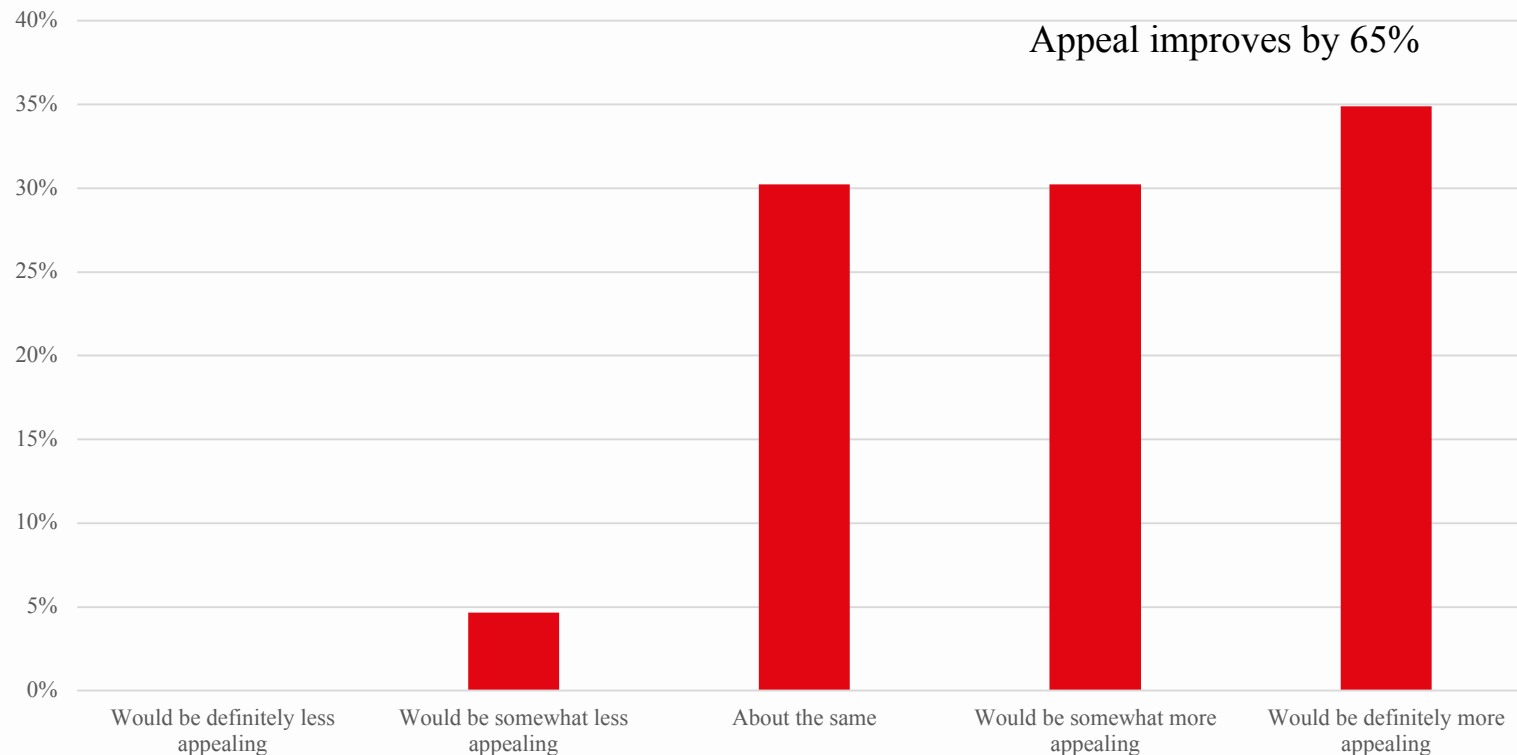
Desirability Comparison



When asked about Raleigh's desirability:

- 32% of planners who had never been here said they didn't know enough
- 40% of those same planners said Raleigh was less desirable than where they had been recently

Assuming Raleigh and the RCC responds to most if not all of the issues that you identified as important for your group, how would you again compare Raleigh as an overall destination relative to the cities that typically host your event?

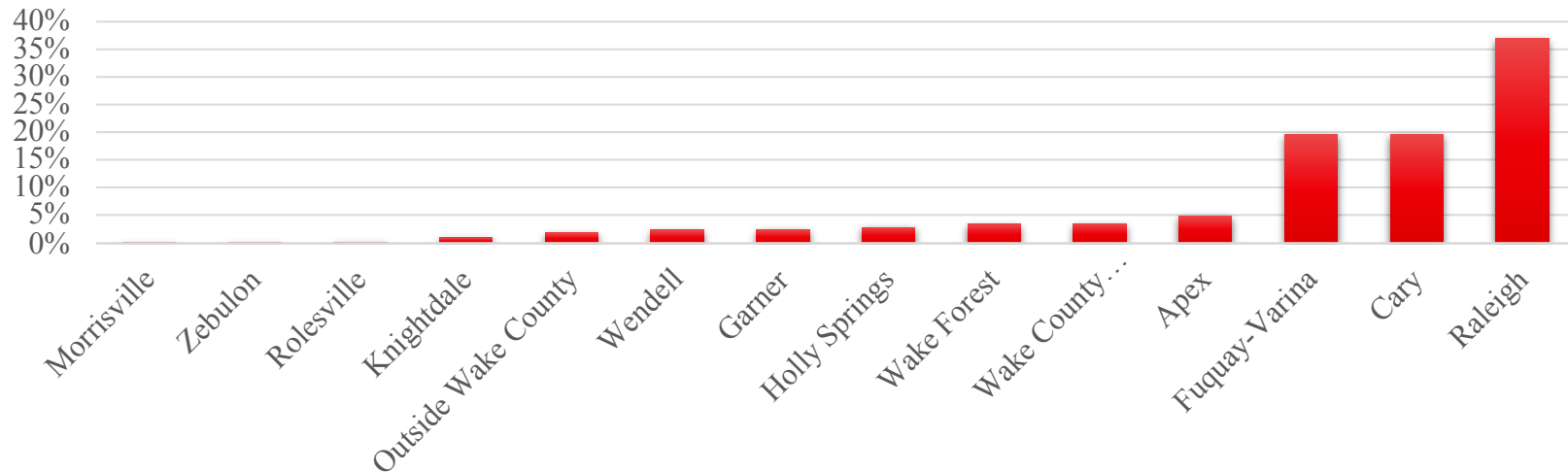


Resident Survey

The resident survey closed with 1,044 responses from across Wake County.

- Raleigh had 37% of all responses
- Cary and Fuquay-Varina had 20% each for a total of 40% of all responses
- Apex made up 5% of all responses
- All other communities made up less than 5% each.

Please select the community where you live:



Resident Survey

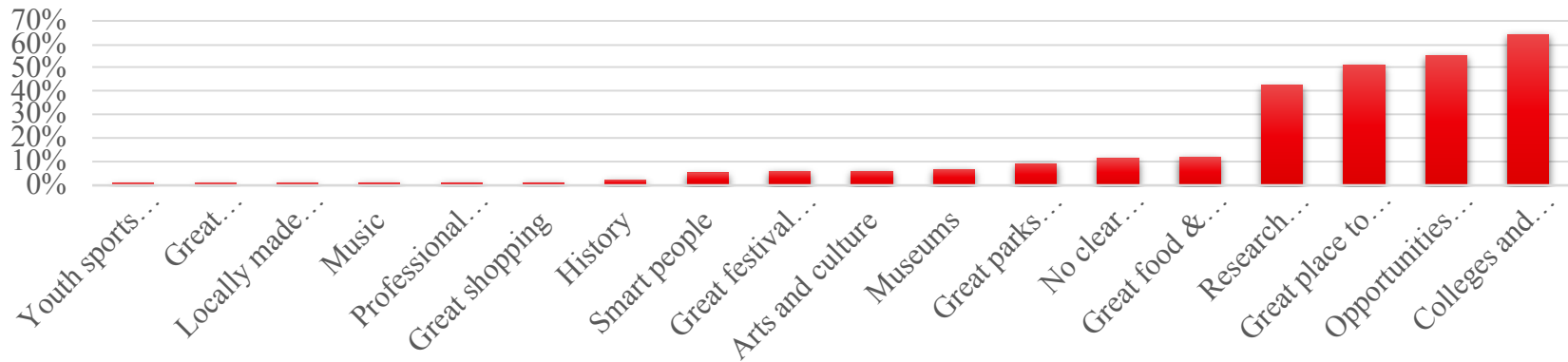
Most open ended responses were “nice”

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

There were a few comments around the political climate

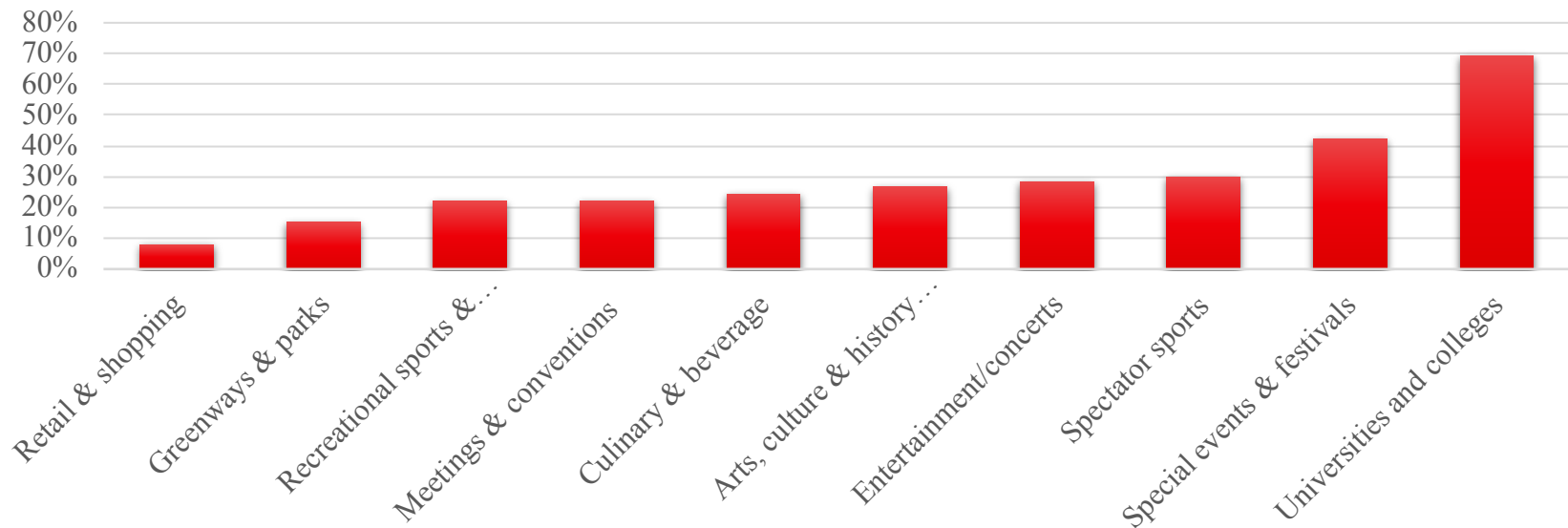
- Backwards politics
- Perception of negative conservatism

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



Resident Survey

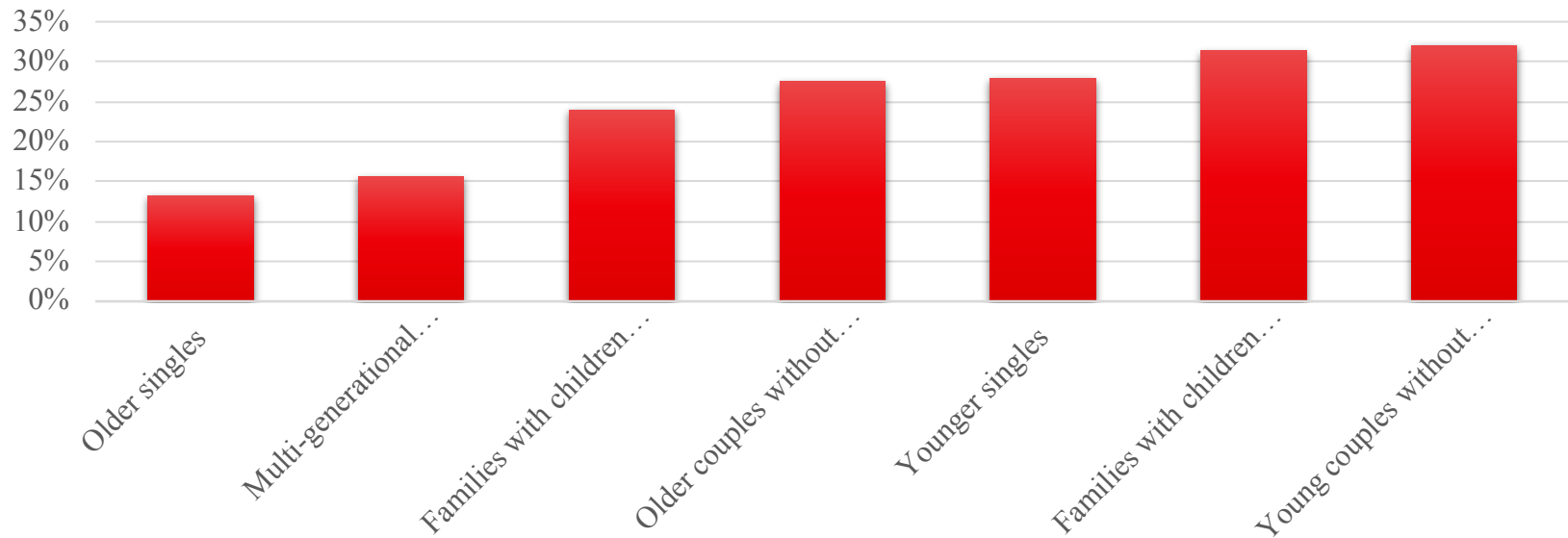
The following list includes various attractions that draw visitors to Raleigh/Wake County. Based on your perceptions of their appeal to potential visitors, please select what you feel are the top three drivers.



Visiting friends and family was the highest open ended response.

Resident Survey

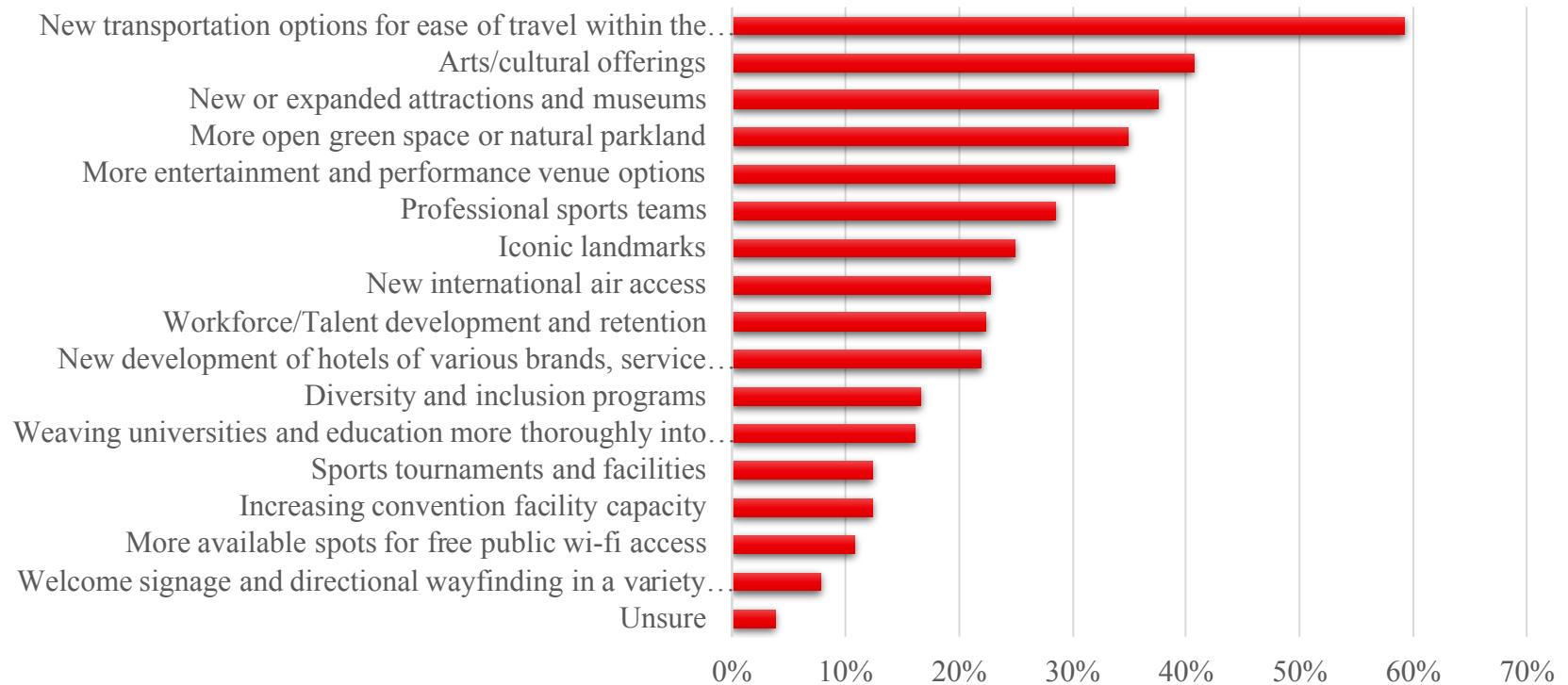
What group of travelers do you feel are the most prominent type of overnight visitors to Raleigh/Wake County?
Please select up to two.



Individual business traveler was singled out in the comments.

Resident Survey

What do you feel is needed to make Raleigh/Wake County an even more attractive destination for future visitors? Please select your top five.



Resident Survey

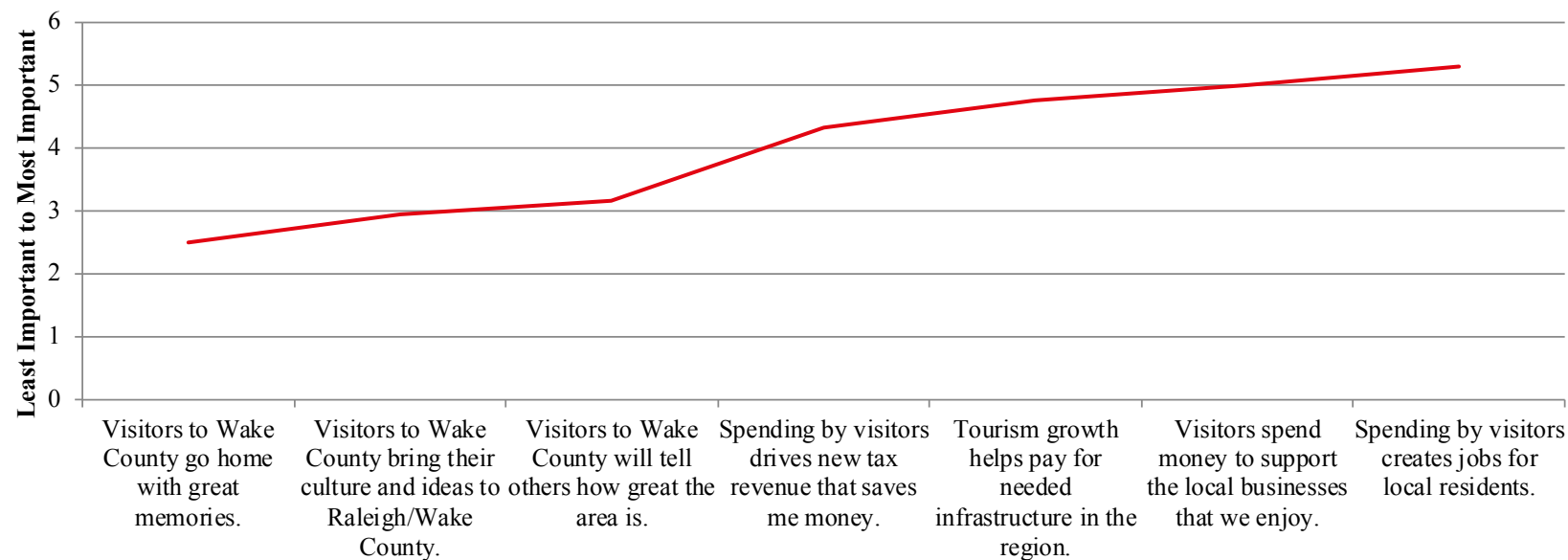
Concentration of phrases and words from the open-ended responses to the previous question.

- Most interesting is the outdoor aspect
- Outdoor, mountain bike, festivals and trails make up 41% of the captured phrases

Affordable Housing Town Restaurants Scene Roads Flights
Arts Festivals Outdoor Places
Public Transportation Culinary
Downtown Clean Parking Legislature
Raleigh Events Food Fun Mountain Bike Impact
Family Sports Shopping Trails Traffic

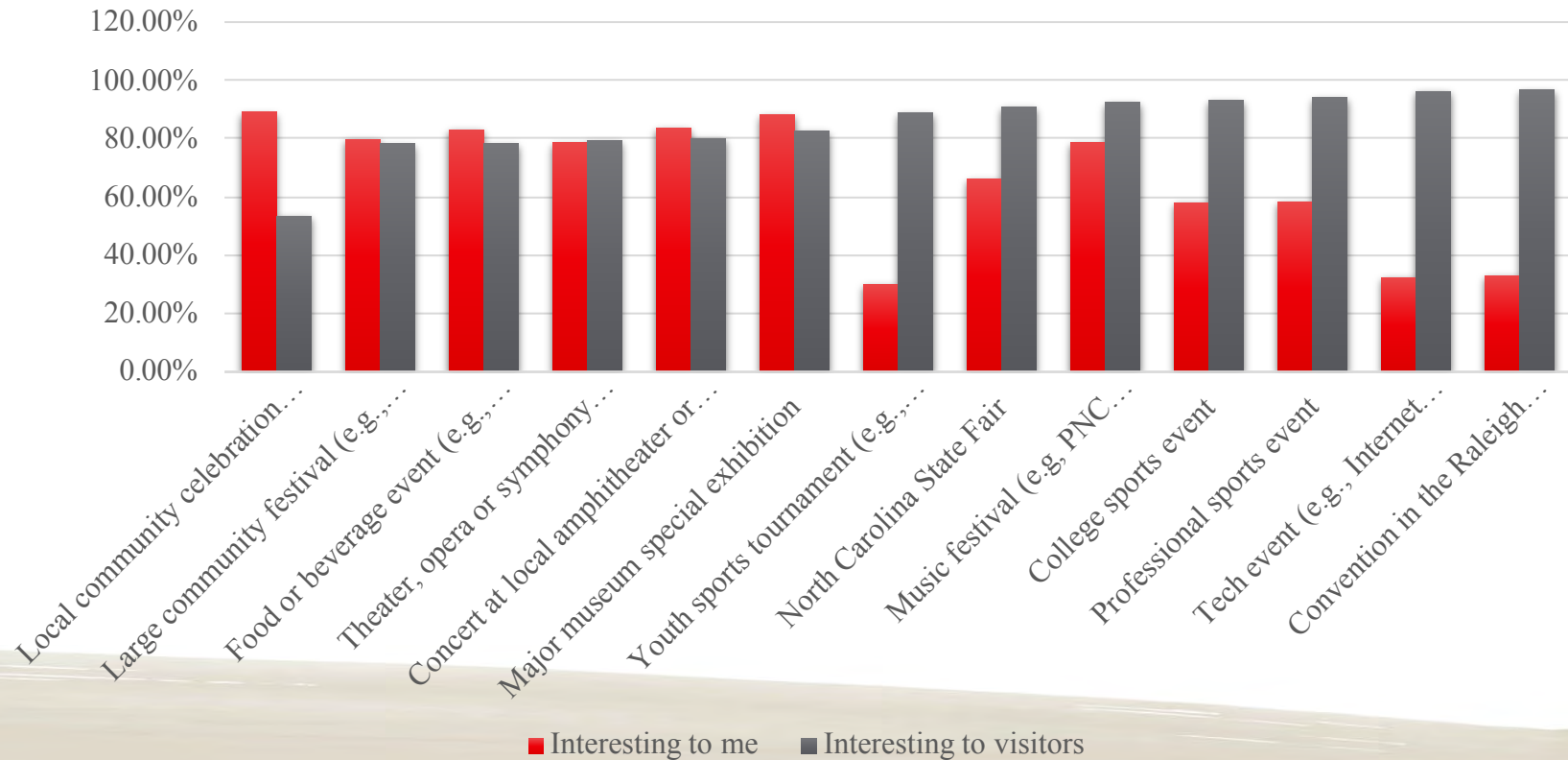
Resident Survey

Please rank your perceptions regarding why residents of Raleigh/Wake County should care about tourism?



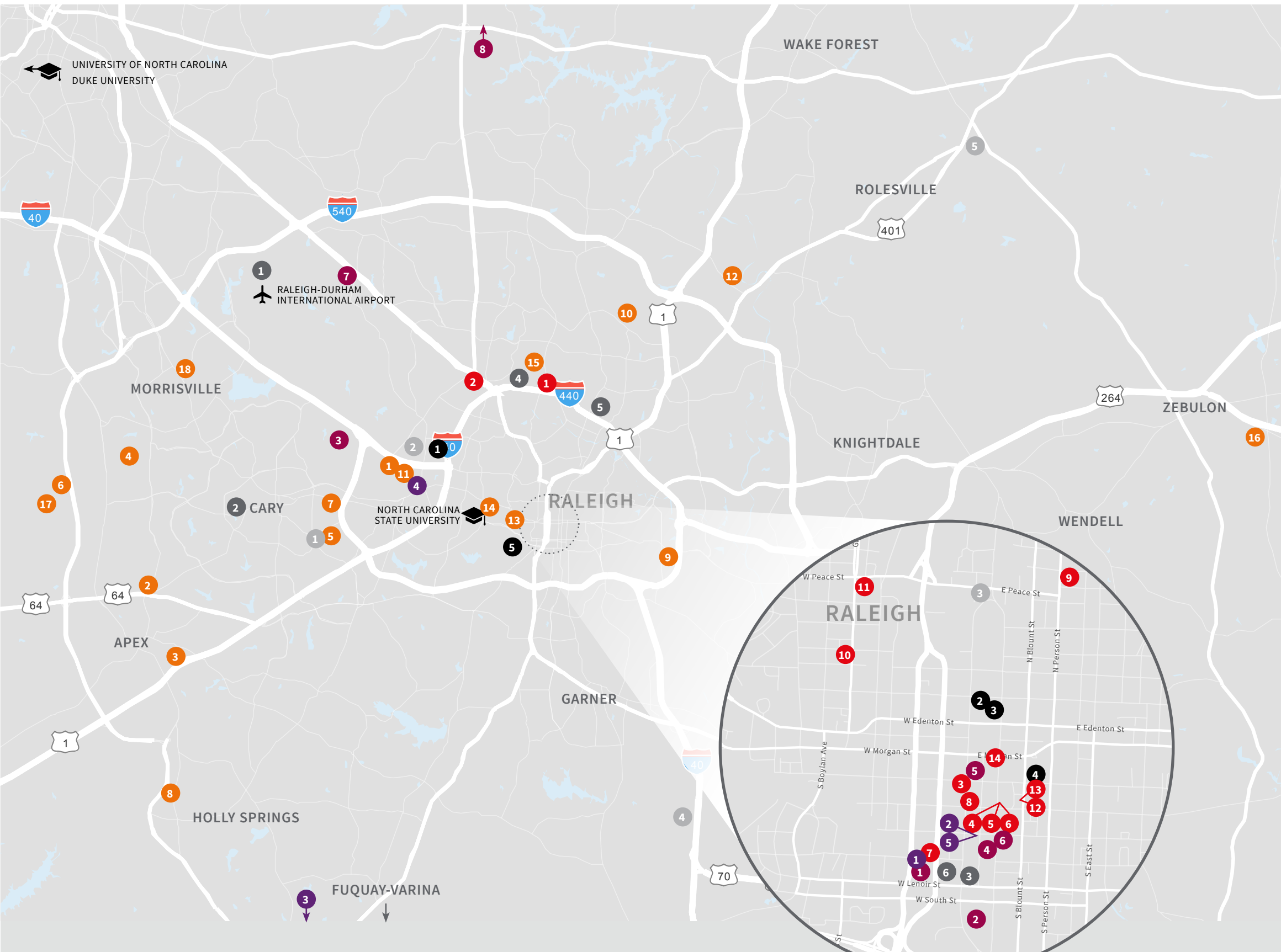
Resident Survey

Visitors attend many different events throughout Raleigh/Wake County. Please tell us the types of events that you find interesting as a resident and/or those types of events that have appeal to draw visitors. If an event is appealing to both residents a



Wake County DSP

HIGHEST & BEST USE



KEY ATTRACTORS

- 1 North Carolina Museum of Art
- 2 North Carolina Museum of Natural Sciences
- 3 North Carolina Museum of History
- 4 Marbles Kids Museum
- 5 Dorothea Dix Park

DESTINATION DEVELOPMENT

- 1 Cary Site
- 2 State Owned Facilities Near PNC Arena
- 3 Downtown State Office Site
- 4 Meadowbrook
- 5 Rolesville Park Site

SPORTS

- 1 PNC Arena
- 2 Southern Sand Volleyball Complex
- 3 XL Sports World
- 4 Cary Tennis Park
- 5 Triangle Aquatic Center
- 6 USA Baseball National Training Complex
- 7 WakeMed Soccer Park
- 8 Ting Park
- 9 Walnut Creek Softball Complex
- 10 Millbrook Exchange Tennis Center
- 11 Carter-Finley Stadium (North Carolina State University)
- 12 WRAL Soccer Park
- 13 Pullen Aquatic Center
- 14 Willis R. Casey Aquatic Center
- 15 North Hills Club
- 16 Five County Stadium
- 17 Thomas Brooks Park
- 18 Triangle Table Tennis

UNIVERSITIES

- NORTH CAROLINA STATE UNIVERSITY
- UNIVERSITY OF NORTH CAROLINA
- DUKE UNIVERSITY

MEETINGS & CONVENTIONS

- 1 Airport District
- 2 Cary District
- 3 Downtown District
- 4 Midtown District
- 5 Raleigh North District
- 6 Raleigh Convention Center

EVENTS

- 1 World of Bluegrass
- 2 Hopscotch Music Festival
- 3 Freedom Balloon Festival
- 4 NC State Fair
- 5 Brewgaloo

QUALITY OF PLACE

- 1 Red Hat Amphitheatre
- 2 Duke Energy Center for the Performing Arts
- 3 SAS Institute
- 4 Duke Energy
- 5 Wells Fargo
- 6 Red Hat
- 7 William B. Umstead State Park
- 8 Falls Lake State Recreation Area

INDIVIDUAL LEISURE

- 1 North Hills
- 2 Crabtree Valley Mall
- 3 Death & Taxes
- 4 Beasley's Chicken & Honey
- 5 Chuck's
- 6 Fox Liquor Bar
- 7 Poole's Diner
- 8 Garland
- 9 Crawford and Son
- 10 Hibernian Restaurant & Pub
- 11 Raleigh Beer Garden
- 12 Bida Manda
- 13 Brewery Bhavana
- 14 Gallo Pelon Mazcaleria



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