

Destination 2028

DESTINATION STRATEGIC PLAN PRIORITY

4. Key Attractors



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Priority Focus

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

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

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

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

Overarching Goal for Key Attractors

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

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

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

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

Museums as Key Attractors

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

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

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

The top 10, in order, are:

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

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

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

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

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

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

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

Physical Development

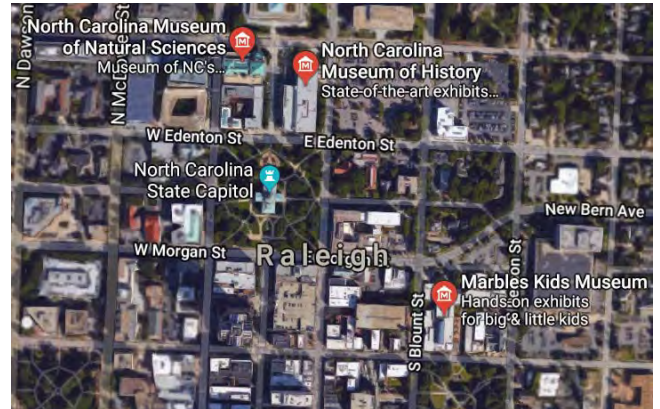
Each of the key attractors has its own development plan and creative concepts that change the physical look and appeal of their site. Each of these concepts carries the potential to increase interest in the Wake County destination product. The degree to which each enhancement produces this interest will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

North Carolina Museum of Art

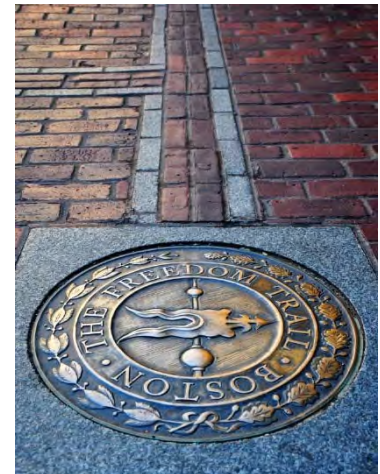
The North Carolina Museum of Art has been aggressively constructing a campus that is iconic, laden with public art, significant in its architecture and interactive in its programming. The greenway tie to the countywide trail system helps the museum to be a functional component of the area's quality of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

Marbles Kids Museum

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



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



N.C. Museum of History

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

N.C. Museum of Natural Sciences

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

Blockbuster Exhibitions

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

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

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

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

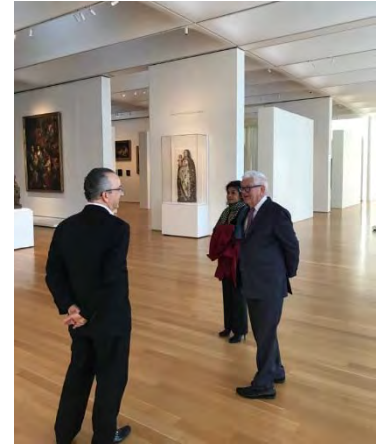
Given the enormity of the task and risk of hosting such blockbuster exhibits, it is unrealistic to build a strategy around them without also identifying an entity to lead the pursuit of an exhibit and to coordinate activity to market the exhibit once it is landed. JLL recommends that GRCVB, in cooperation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

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

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

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

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



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

Steps to Consider a Blockbuster Exhibition

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

Experiential Programming

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



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

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

Collaboration

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

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

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

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

Dorothea Dix Park

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



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

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

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

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

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

Visitor-facing concepts for Dorothea Dix Park, continued

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

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

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

Key Attractor Takeaways

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