

ABRIDGED



Raleigh, N.C.

Marketing Blueprint

Provided by the Greater Raleigh Convention and Visitors Bureau
as the area's accredited destination marketing organization

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01



EXECUTIVE SUMMARY

Executive Summary

Greater Raleigh Convention and Visitors Bureau (GRCVB) retained Development Counsellors International (DCI) in June 2014 to assess the destination's brand strategy. DCI prepared a well-researched Marketing Blueprint that provides guidance and effective strategic recommendations for promoting Raleigh, N.C., and Wake County as a destination.

GRCVB, as the official destination marketing organization of Raleigh and Wake County, accelerates sustainable economic growth and development by increasing visitor and convention business. In order to optimize the Bureau's mission, the destination brand strategy reassessment revisits internal and external stakeholder opinions about the Raleigh area as a business and leisure destination.

In addition, the recommendations put forth during the destination brand strategy process and recommendations from the Marketing Blueprint serve to reinforce the GRCVB's 2014–2018 Strategic Plan. The aforementioned plan outlines three specific goals: develop and sustain a seamless destination network that consumers sense, feel and share; support destination enhancing development; and increase the GRCVB marketing and sales budget.

DISTILLING RALEIGH'S DESTINATION MESSAGE

Raleigh, North Carolina, is a burgeoning tourism destination. Small business, hospitality, leisure and meetings sectors are all thriving due to the organic growth in appeal of the destination. With major infrastructure enhancements (mainly at RDU International Airport) and favorable quality of life rankings such as Forbes' number one "Best Places for Business and Careers," Raleigh is generating strong national consumer interest from top travel media.

Upon review of existing destination brand statements, there were many attributes and key messages missing from the brand platform previously adopted by GRCVB. Thus, there is a subsequent need to further focus, embrace and harness all of Raleigh's authentic qualities and homegrown attributes to identify its brand. By doing so now, GRCVB has developed a clear and effective destination brand strategy platform that will empower internal stakeholders to guide the destination toward greater growth and brand appeal. This will, in turn, resonate with external stakeholders to visit Raleigh on more than one occasion.

Skift.com proclaimed the rise of the “boutique destination” as one of the top trends in “Megatrends Defining Travel in 2015.” Editor Jason Clampet commented, “What we’re seeing now is a search for the authentic in a world that too often seems homogenous and already discovered. The movement is opening more destinations to visitors, and doing so without forcing the places to mimic the charms of top destinations.”

With the Marketing Blueprint, GRCVB is presented with strong and identifiable destination brand messaging and strategies that will serve to communicate Raleigh, N.C.’s destination strengths and personality, further allowing it to thrive and compete. This blueprint will serve as a guide to hospitality, tourism and all internal stakeholders who are looking for ways to understand and communicate the virtues of Raleigh, N.C., as a visitor destination.

THE PLAN TO DEFINE RALEIGH, N.C.’S DESTINATION BRAND APPROACH

Prior to crafting the Marketing Blueprint developed for GRCVB, extensive research was conducted to help reveal and understand opinions and perspectives from various internal and external stakeholders. An assessment of interview and survey results revealed opportunities, weaknesses and, most importantly, commonalities in the perception of the destination from a wide audience. Following research review, the various destination brand messages employed by GRCVB in the existing brand strategy platform were analyzed. Through careful dissection, opportunities to enhance and deliver a more strategic brand statement, rooted in research and prevailing stakeholder sentiment, were identified.

Listed below is a synopsis of the activities conducted within each phase of this destination brand strategy reassessment project.

DISCOVERY/RESEARCH:

Internal:

- 20 C-suite and management level stakeholders were interviewed in person.
- A database of 3,000 industry stakeholders was surveyed.

External:

- 1,000 consumers (past or potential visitors) from key markets were surveyed.
- 50 meeting planning professionals and Customer Advisory Board (CAB) members were surveyed.
- 675 key national, regional and local media were audited.
- Competitor destination brand positions were reviewed.
- GRCVB marketing materials and key documents were analyzed.
- Existing destination visual identity was tested against the new brand platform.

PROMISE/STRATEGY:

- Existing GRCVB destination brand messages were analyzed.
- Enhancements to GRCVB destination brand platform were developed.
- Implementing “Raleigh, N.C.,” as the official destination name was recommended.
- Key destination elements were defined:
 - Smart/Savvy/Educated
 - Passionate/Driven/Entrepreneurial
 - Modern/Innovative/Thriving
 - Undiscovered/Emerging
 - Community/People/Personalities
 - Quality of Life
 - Cultured/Heritage
- Alignment with North Carolina state branding was verified.
- Three key messages for destination promotion were implemented:
 - Smart
 - Modern Establishment
 - Undiscovered
- Target audiences based on demographic and psychographic profiles were determined.

IMPLEMENTATION:


- A Brand Manual was developed to guide the application of destination’s brand strategy platform.
- A Marketing Blueprint including program recommendations for local and industry engagement, market engagement and measurement was finalized.
- A marketing material review consisting of 24 key marketing vehicles developed by GRCVB was completed.



Lissa Götvals

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INTRODUCTION



Smaller destinations are finding smart ways to market what they are, not what they think others want them to be. And they're finding success reaching visitors outside of traditional media and advertising.”

From Jason Clampet's *Megatrends Defining Travel in 2015*

Introduction

Effective destination marketing requires a carefully researched destination brand and brand strategy. This helps communicate the most important values of the brand within an organization or local industry and helps localize attention from outward visitors and prospects considering investing in a visitor experience.

Without recent and comprehensive research and analysis, it is difficult to understand how internal and external viewpoints either align with the message a brand is communicating or completely miss the mark. In the case of Raleigh, North Carolina, DCI was asked to carefully evaluate how the existing brand strategy platform stewarded by GRCVB performed against fresh research conducted on important stakeholder groups and performed against its competitor destinations.

After assessing the results across groups, a thorough reassessment commenced of Raleigh's destination brand strategy platform as it was previously defined. Elements reviewed included brand promise, brand positioning statement, value proposition, a destination brand name recommendation and key themelines.

In some instances, a complete revision was necessitated by the research; in others, enhancements were made to elements that better connect the type of experience offered in the destination with the benefits. In the case of the value proposition, an original statement was crafted where none previously existed.

ULTIMATE OBJECTIVE:

The fundamental goal was to reassess and redefine Raleigh, North Carolina's destination brand strategy platform based on research, presenting recommendations for enhancement if necessary.

TARGET OUTCOMES:

- Update research findings from key stakeholder groups,
- Reassess and sharpen the destination brand strategy platform,
- Develop strategic guidelines and recommendations to develop a new effective and accurate destination brand strategy platform that can be embraced internally within GRCVB and the local hospitality community,
- Improve how Raleigh, N.C., and Wake County are sold and promoted externally,
- Enhance how Raleigh, N.C., is embraced as an authentic and emerging destination among internal audiences.



03

CURRENT SITUATION



The best brand stewards are accomplished detectives, constantly searching for what works, and what works against the cause.”

From Lynn B. Upshaw's *Building Brand Identity*

Current Situation

“States and cities across the US recognize the importance of the visitor economy and collectively invested nearly \$2 billion in destination promotion last year. The massive value and growth trends of the US visitor economy warrant these investments, which enable destinations to compete effectively in both leisure and group meetings markets. Indeed, destination promotion has been consistently proven to yield significant returns in the form of incremental visitor spending driven by sales and marketing campaigns.”

—*Oxford Economics, “Destination Promotion: An Engine of Economic Development,” November 2014*

As noted in the recent research report, “Destination Promotion: An Engine of Economic Development,” conducted by Oxford Economics and released by Destination Marketing Association International in November 2014, “travel has proven its resilience, with a strong recovery from the most recent economic downturn. As the visitor economy has recovered, it has contributed job growth since the end of the recession at a faster rate than the US average. As of July 2014, employment in key sectors of the visitor economy was 7.9% ahead of its June 2009 level, compared to a 6.1% gain for the broader economy.”

Locally, Wake County has experienced a healthy visitor industry, reporting 14.4 million visitors who generated \$2.2 billion in direct spending in 2014.^{1,2} This robust economic boost signifies an ROI to government of more than \$219 million in state and local tax revenues and directly sustains the employment of more than 24,000 people (FTEs) in Wake County who receive more than \$656 million in payroll earnings.²

Wake County’s financial and economic well-being is no doubt bolstered by the success of destination promotion not only led by organizations such as GRCVB but also by small businesses, corporations, educational institutions, civic organizations and local citizens who rely on the tourism economy to contribute to and enhance the quality of life in Wake County.

In fiscal year 2014–2015, GRCVB, with a budget of \$5.3 million, was directly responsible for a direct economic impact (from meetings and sports groups only) of \$138 million for Wake County.³

More recent figures point to successful trends for Wake County. In 2014, hotel occupancy tax collections totaled \$20.26 million and food and beverage tax collections totaled \$23 million.⁴ In 2014, hotel occupancy tax collections were up 13 percent compared to 2013.⁴

Wake County's tourism sector is well-positioned to increase market share of leisure, group and meetings/convention business in the years to come. The success of GRCVB and local tourism promotion efforts is dependent on addressing and improving two key issues. These issues were highlighted in the interviews of 20 local stakeholders and C-level executives. The first area of common concern among this group was the lack of tourism infrastructure including an airport-to-Raleigh light rail connection, sufficient public transportation and downtown Raleigh hotel inventory. The second issue stakeholder respondents, consumers and media noted was that Raleigh, the area, did not currently possess an identifiable tourism brand. Many were hard-pressed to name specific brand attributes or identify compelling reasons to visit the area outside of museums, adjacent educational institutions and the Research Triangle Park.

While tourism infrastructure development is a goal of GRCVB and should be pursued in years to come, this Marketing Blueprint is posing strategic recommendations to better identify and communicate the prevailing destination brand for Wake County—Raleigh, N.C.

Sources:

¹ D.K. Shifflet & Associates for GRCVB

² Tourism Economics for GRCVB

³ National Association of Sports Commissions; Greater Raleigh CVB

⁴ Wake County Revenue Department



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ABOUT DCI



When hiring a specialist to help research and rearticulate a compelling, competitive destination brand strategy for the Raleigh area, GRCVB's prime considerations were the firms' strategic/ analytical experience as well as their understanding of destination promotion as economic development.

Development Counsellors International's expertise in all phases of economic development and travel marketing and its belief that CVBs can and should join forces with their area economic development organizations (EDOs) made DCI the best choice for managing this important project.

Jonathan Freeze, CDME, CHIA, Director of Marketing for the Greater Raleigh Convention and Visitors Bureau, 2015

About DCI

Development Counsellors International (DCI) is the leader in marketing places. Since 1960 we have helped destinations, small and large, develop strategic marketing and communications programs which enable them to grow and achieve sustainable economic growth. Since we opened our doors, we have worked for more than 450 communities—from countries, to states, to thriving metropolitan regions, to rural areas—all striving to promote their community for travelers and investment.

Each day we strive to implement programs that not only increase visitor arrivals and spending but also create jobs in local communities.

DCI has developed Marketing Blueprints for tourism and economic development organizations that are looking to assess, restructure and improve upon their marketing practices for the greater good of the destinations and communities they serve. The Marketing Blueprint is ultimately designed and developed to provide tangible, specific recommendations to achieve provable results in attracting more visitors.

Our Marketing Blueprints are based on years of experience. Clients such as Wake County Economic Development; Carrolton, Texas; and Denver, Colorado, have utilized DCI's Marketing Blueprint services, representing the diversity of the clients we service.

Based in New York City, the DCI team includes more than 50 place marketers, the largest assembly of place marketing specialists in the world. This specialized experience means that GRCVB, Wake County's tourism sector and the local community will benefit from the approach, strategic insight and recommendations we have gained and applied for more than 50 years.



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METHODOLOGY

Methodology

The destination brand strategy platform reassessment and Marketing Blueprint process began with GRCVB in August 2014. At the onset of the program, a series of phases were outlined which would allow a strategic build of recommendations for the Raleigh area.

The discovery phase of the visitRaleigh brand reassessment involved the completion of in-person stakeholder interviews, competitor destination analysis and a total of four surveys completed by internal and external audiences, including local C-level and management stakeholders. External stakeholder audiences who were surveyed consisted of consumers (previous and prospective visitors); meetings and convention planners; and national and regional media.

In August 2014, DCI's Executive Vice President and Partner for Tourism Karyl Leigh Barnes, Director of Research Robyn Domber and Project Director Daniel Guerrero traveled to Raleigh to conduct in-person interviews of 20 local management stakeholders and C-level executives. In addition, in-person tours and visits were conducted in Apex, Cary and Holly Springs, North Carolina.

In-person interviewees included spokespersons from Cary's business/chamber community, City of Raleigh government (including arts, convention center, economic development and museums/parks), North Carolina State Fairgrounds, Raleigh's brewery, restaurant/nightlife and live music scenes, Raleigh museums (including Marbles Kids Museum), Tobacco Road Tours, Town of Holly Springs, Town of Knightdale, Wake County Economic Development and Wake County government.

ADDITIONAL DISCOVERY PHASE RESEARCH:

- A database of 3,000 industry stakeholders was surveyed.
- 1,000 consumers (past or potential visitors) from key markets were surveyed.
- 50 meeting planning professionals and Customer Advisory Board (CAB) members were surveyed.
- 675 key national, regional and local media were audited.
- Competitor destination brand positions were reviewed.
- GRCVB marketing materials and key documents were analyzed.
- Existing destination visual identity was tested against the new brand platform.

The second phase of the destination brand strategy platform reassessment process involved the development of statements that will comprise Raleigh's destination brand approach. This integral step provided recommendations that were rooted in the research findings revealed during the discovery phase, including observations collected during time spent in market.

Once the research was complete, existing destination brand statements were analyzed. This process revealed repeated opportunities to emphasize specific destination attributes that are unique to Raleigh and Wake County. Each current brand statement was then assessed, when available, to evaluate if it was reflective of this set of attributes.

Strategic themelines and target audiences were identified and recommended to GRCVB to communicate the destination's brand. One additional step involved the review of North Carolina's state tourism branding messaging to assess the parallels and consistencies that exist between Raleigh's brand messaging and the state's own messaging.

Lastly, the need for the establishment of a singular and clearly identifiable destination brand name was communicated. Raleigh, N.C., as a destination name will provide a clear and consistent place from which to communicate the brand strategy outlined in this document. Research consistently showed that neither Wake County nor smaller, adjacent towns were largely identifiable when observing the responses from external audiences.

This Marketing Blueprint presents the aggregate of the work carried out, going one step further to delineate program recommendations for GRCVB and the larger tourism sector in the Raleigh area.



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DISCOVERY/RESEARCH



The fundamental motivation driving a visit to a given destination is frequently not the offerings of a single business—instead it is the destination, including a range of attractions and the overall experience of a place.

This experience is comprised of a visitor's interaction with, and patronage of, numerous businesses and local experiences: hotels and other accommodations; restaurants; shopping and galleries; conferences; performances and other events; family activities; sports and other recreation; and cultural sites and attractions.”

From Oxford Economics'
Destination Promotion: An Engine of Economic Development

Discovery / Research

INTERVIEWS

Time in-market and with the individuals interviewed revealed a series of opportunities and challenges for the destination. Viewpoints, specific examples and recurring themes formulated our recommendations for ways to enhance the destination brand strategy platform. Below are the top six observations for the opportunities and challenges that face Raleigh, N.C., as a destination.

OPPORTUNITIES

1. CREATIVE, SPIRITED LOCAL ENTREPRENEURS

Raleigh is a place that welcomes people with passion, creativity and desire to positively impact their community. New ideas and businesses have given life to unique products/ services and experiences that are often designed for locals but are ripe for engaging new and repeat visitors.

2. CHARMED QUALITY OF LIFE

A terrific education system, relatively low-priced real estate, expansive parklands, quality museums and a rich quality of life fueled by the presence of corporate, research and educational institutions reinforces the qualities that make for an authentic, safe and enriching visitor experience.

3. SMART POPULATION

Business, research and educational professionals and students comprise much of the population in Raleigh and Wake County. This leads to a community that places a premium on experiences that foster advancement, growth and learning. When measured by its museums and educational institutions, Raleigh as a “smart” place became a recurring theme.

4. COLLEGIATE/EDUCATIONAL PRESENCE

The area’s colleges and universities were identified as an advantage for Raleigh as a tourism destination. Many felt that the tourism sector has a lot to gain by working with colleges and universities to foster marketing programs and leverage the presence of faculty, undergraduate and graduate students in the area.

5. CULTURAL AND GEOGRAPHIC DIVERSITY

The Research Triangle Park, colleges and universities and multinational corporate entities were cited as the driving force behind Raleigh’s cultural diversity.

Entrepreneurial opportunities, a good quality of life and a modern and embracing society reinforced the reasons why Raleigh is diverse. Natural parklands, a vibrant downtown Raleigh and opportunities for a wide range of outdoor activities were noted as diverse geographic positives.

6. FAMILY-FRIENDLY

A high quality of life, affordable real estate, safety, museums and cultural institutions and natural parklands and greenways were all cited as factors contributing to Raleigh and Wake County's appeal for families. Reinforcing and promoting this appeal to potential visitors can continue to be a focal point.

CHALLENGES

1. PUBLIC TRANSPORTATION AND TOURISM INFRASTRUCTURE

Several interviewees noted the lack of public transportation within downtown Raleigh, insufficient connections to RDU International Airport and no way to connect larger Wake County with experiences found in Raleigh's core as possible deficiencies. These deficiencies were seen as detractors or challenges to providing an ideal visitor experience. Furthermore, others noted a lack of downtown "headquarter" hotels as well as boutique or popular lifestyle brands such as W or Aloft. These shortages are perceived to limit Raleigh's competitiveness.

2. LACK OF TOURISM IDENTITY AND ICONIC ATTRACTIONS

Raleigh is a wonderful place to live and work, but for many, Raleigh was seldom viewed as a place most would think to visit. For a majority of people, the lack of an identifiable tourism brand identity directly correlates with a lack of an identifiable icon. Several interviewees cited icons in other cities such as Times Square in New York City or the French Quarter in New Orleans. Iconic visitor experiences such as these are insufficient in Raleigh. Hosting iconic attractions will ultimately help define Raleigh to prospective visitors.

3. IDENTIFIABLE BRAND

In addition to the perceived lack of tourism identity and lack of iconic attractions, many noted the lack of an identifiable destination brand as a challenge. A recognizable destination brand will help effectively tell the Raleigh story and ultimately increase overnight visitation.

4. COMMUNICATION/SYNERGY

Clear and effective communication between different tourism, civic (state, county and city/town/local government) leaders and organizers of sporting events as well as other

cultural organizations creates a consistent destination story. Inconsistent communication was cited as a challenge for Raleigh in achieving synergy and populating a consistent and clearly articulated destination story.

5. REGULATION/DEVELOPMENT

The perception of archaic business policies, less-than-progressive leadership and other business-limiting policies were cited as deterrents to music venue, bar and brewery and hospitality businesses.

6. PREVALENCE OF OUTDOOR/VISIBLE ADVERTISING

Throughout North Carolina and on regional highways where other competitors are present, a Raleigh advertising campaign is noticeably absent. Strong parallels to other, competing and often higher-funded regional destinations were made when noting this lack of visible Raleigh outdoor and roadside advertising.

SURVEY RESULTS

Email surveys were developed and deployed to key internal and external audiences to assess perceptions from each of the following groups: national consumers, meetings and conference professionals, national media and local stakeholders. Below are the key takeaways assessed from responses received from each of these groups.

LOCAL STAKEHOLDERS

The area's stakeholders are, in general, very proud and supportive of the tourism sector and the efforts being taken to increase national exposure. Over 80% of respondents feel that Raleigh's tourism sector as a whole is doing "well" or "very well" in marketing the area and its assets to potential visitors and meeting and event planners. However, a variety of opinions exist on how to better market the area and improve on its branding efforts.

The majority of respondents to the survey were transplants to the area; however, over 55% have lived in the region for more than 16 years. The top three statements that most resonated with stakeholders in capturing the image of Raleigh/Wake County are as follows:

1. A family-friendly destination with a wealth of museums, festivals, live performances, parks and lakes.
2. A top cultural destination with numerous art, music, theater and dance offerings.
3. A destination rich in heritage and history with plenty of historical sites and stories.

Meanwhile, downtown Raleigh is very polarizing. It is clearly identified as a strength and asset; however, it is also viewed as a weakness. There are numerous suggestions on how downtown Raleigh needs to be improved in order to become an attractive destination for downtown visitors from within and from outside the immediate area. Suggestions include better transportation systems and infrastructure (e.g., better public transit, more parking), additional marketing efforts aimed at local residents (a prerequisite to reaching a larger target audience), more family-friendly activities, more nightlife and more downtown hotels. Numerous stakeholders also emphasized Raleigh's strategic location between the mountains and the coast.

NATIONAL CONSUMERS

The consumer and visitor survey analyzed the perceptions of Raleigh among potential and previous visitors. Overall, this audience had strong opinions about and knowledge of Raleigh and its offerings regardless of whether they had visited previously or not.

Among those who had visited Raleigh, the majority (61%) were there for a vacation or leisure trip. While a variety of reasons were given as to why they had visited the area, recommendations from family and friends, the climate and the overall beauty and attractiveness of the area were some of the primary reasons for visiting. Impressions of Raleigh following a visit were overwhelmingly positive:

- 33% reported feeling "excited" after their visit to Raleigh, followed by 30% who felt "entertained" after their visit.
- When asked how likely they would be to recommend the Raleigh area to a friend or family member as a great place to visit (on a scale where 1 is not likely and 10 is very likely), 48% provided a rating of 10 while an additional 23% provided a rating of 9. Only 3% provided a rating of 5 or lower.

Regardless of whether a respondent had visited the area, perceptions of Raleigh were generally positive.

- 27% of respondents rated Raleigh as "positive" or "very positive" on its appeal as a tourism destination. The only destinations to receive higher ratings were Virginia Beach, Va., and Charlotte, N.C.
- When asked about their perception of Raleigh as a destination, 36% of respondents reported that it is a vacation destination that is becoming very popular.

"Family-friendly" was a key theme that was repeatedly seen as a strength of the area. The description of Raleigh that most resonated with respondents was "a family-friendly destination and place to live, with a wealth of museums, festivals, live performances,

parks and lakes.” Reconnecting with family and having family-friendly activities are key considerations in deciding whether to visit a destination, and Raleigh is perceived as having a strong foundation and base for these attractions.

MEETINGS/CONFERENCE INDUSTRY

Raleigh is facing strong competition as a host city for meetings and conventions from destinations such as Washington, D.C., Atlanta, Ga., Charlotte, N.C., and Nashville, Tenn. However, Raleigh has a number of assets that allow it to successfully compete against these locations. Among respondents who have held meetings or conventions in the Raleigh area, the reviews of Raleigh were overwhelmingly positive.

- 100% of respondents who have held meetings or conventions in Raleigh would return.
- Raleigh’s top strengths as a meetings and convention destination include: location and accessibility, hotels (availability), cost and value of the destination (including hotel rates) and the quality of the convention center and other meeting place options.

Regardless of whether respondents held meetings in Raleigh, the average overall rating of Raleigh as a meetings destination (on a scale where 1 is poor and 10 is excellent) was 7.85. The key strengths were the quality of CVB services, safety and security of the area, quality of meeting space and the ease of getting around the city.

Key challenges the Raleigh area faces in attracting major meetings and conventions include a lack of hotels downtown, limited “charm” or amenities within walking distance and a reported general lack of a “cool” factor.

NATIONAL MEDIA AUDIT

The Raleigh area is a positively viewed but largely unknown destination according to surveyed media outlets.

- The average rating of Raleigh as a tourism destination was above average: 3.5 (on a scale where 1 is poor and 5 is excellent); however, nearly 27% of respondents were not familiar enough with the area to provide a rating.
- Ratings of various tourism-related factors were also rated as “above average.” The highest ratings were given to “quality of CVB services,” “quality of accommodations” and “availability of meeting space.”
- While a relatively high percentage (60%) of respondents have visited the area (many visiting multiple times), only 35% have published editorials on the Raleigh area.

Raleigh is the most recognizable and most frequently visited city in the region, which largely contributes to the area’s image as a “town and gown” destination among this

audience. The term “capital city” is the word or phrase most commonly associated with Raleigh, and 74% of respondents associate the Raleigh area with “colleges.”

There is considerable opportunity to increase this audience’s exposure to Raleigh and what it offers. Many respondents emphasize the need to identify a unique niche or storyline and educate the media. Press trips, additional advertising and greater dissemination of information were all offered as needed steps in increasing exposure to Raleigh’s brand.

What three words or phrases come to mind when you hear “Raleigh, North Carolina”?

- Capital city (16)
- Research Triangle (10)
- Southern (7)
- College town (6)
- Tobacco/cigarettes (6)
- Beautiful (5)
- Technology (5)
- Comfortable (3)
- Hill country (3)
- City (2)
- East coast (2)
- Food (2)
- Historic (2)
- Museum of Natural Sciences (2)
- North Carolina State (2)
- Nice people (2)
- Relaxed (2)
- Rural (2)
- Southern hospitality (2)

RESULTS IN THE CONTEXT OF EXISTING RESEARCH

An important component of the discovery phase was the review of existing research studies conducted by or on behalf of GRCVB or its primary stakeholders, including but not limited to:

- 2010–2012 Raleigh Visitor Profile
- 2014–2018 GRCVB Strategic Plan
- City of Raleigh Findings from Research with Key Stakeholders (Communications Audit)
- Arts & Economic Prosperity IV: The Economic Impact of Nonprofit Arts and Culture Organizations and Their Audiences in Wake County, N.C.
- The Economic Impact of Tourism in Greater Raleigh, North Carolina: 2012 Analysis

The findings uncovered by DCI closely align with, yet provide updated results from, previous studies and reports. For instance, FleishmanHillard’s “Research with Key Stakeholders” report identified several strengths and challenges that were echoed in DCI’s research among stakeholders roughly one year later. The Raleigh area continues to be perceived as diverse, young, vibrant and growing. Meanwhile, several identified challenges facing the area were reiterated in DCI’s research, including the lack of a unified vision and public transportation constraints.

The area’s stakeholders, in general, are very proud and supportive of the tourism sector and of the efforts being taken to increase national exposure, a sentiment that continues to appear throughout the most recently conducted research. A key theme that was reinforced in DCI’s research was the need to continue to engage and educate local stakeholders/residents on proposed initiatives and activities.

When considering external audiences, visitors to the area continue to be traveling for getaway and leisure purposes and, less so, for business and/or meetings. A high percentage continue to visit purposefully to see family and friends. Importantly, in the “2010–2012 Raleigh Visitor Profile,” a key recommendation was to make Raleigh more attractive for families, and DCI’s research revealed that progress has been made towards this goal and that the Raleigh area is currently perceived as a “family-friendly” destination.

The review of past research provided confirmation of existing trends and discoveries while also allowing DCI to gauge recent progress on various prior recommendations: it formed a valuable input into the discovery phase.



07

DETERMINING
THE MESSAGE,
THE AUDIENCE
AND THE MARKET



Today, North Carolina's capital is awash in entrepreneurial energy from homegrown clothing labels and converted art galleries to craft breweries and ambitious restaurants. More than merely one of the Triangle's three vertexes, Raleigh is now defining itself as a destination worth exploring on its own merits, regardless of what lies beyond the city limits."

*From Ingrid K. William's 36 Hours in Raleigh, N.C.,
The New York Times, March 6, 2014*

Determining the Message, the Audience and the Market

DESCRIPTION OF BRAND AND KEY MESSAGING

Moving forward it is recommended that the destination known currently as Greater Raleigh is recognized and branded “Raleigh, N.C.”

This recommendation will allow the GRCVB to concentrate and focus destination awareness on Wake County’s largest city and North Carolina’s capital city and seat of government—Raleigh. The usage of the N.C. abbreviation defines the destination’s geographic location for those who may be unsure. Larger state tourism identification efforts, such as Visit North Carolina, also utilize the abbreviation as an identifier (e.g., their website URL visitnc.com). A general unfamiliarity with the Raleigh area as a destination brand name has been exposed in our collective research.

Alternatively, external research shows that the City of Raleigh is the most frequented and favored among consumers, meeting and convention planners and the media. Providing a strong anchor and harnessing the energy of the entire area will strengthen awareness, drive interest and convert visitation, helping Raleigh’s tourism sector to grow. This will be achieved by positioning the Raleigh, N.C., name at the forefront of all brand communications.

Unfortunately, the region of Raleigh does not enjoy a significant amount of awareness to warrant a continued brand approach that attempts to entice visitors to largely unrecognizable places in the region. Another important consideration is ensuring that audiences further removed from the Southeastern United States can easily identify Raleigh in a state where other North Carolina destinations, such as Charlotte, enjoy strong name recognition due to explicit professional sports team associations (e.g., Charlotte Hornets versus Carolina Hurricanes), which afford national visibility. Attracting visitors outside of the drive markets is important: it often translates to longer stays and a greater economic impact.

DESTINATION POSITIONING STATEMENT

Raleigh is a thriving Southern capital city shaped by the passionate minds of its residents.

Smart and savvy locals are the lifeblood of the city, the brains behind its educational institutions, renowned research facilities, historic preservation efforts and enviable rankings for a quality of life that is physically represented through lush greenways and natural parklands. Travelers intrigued by Raleigh’s long list of superlatives will discover that its entrepreneurial locals are responsible for its emerging success and for the fostering of its cultural heartbeat, including museums, arts, live music, craft culinary and beverage scene, handcrafted goods and historic experiences.

The external stakeholder research, namely consumer and media insights, demonstrates that Raleigh lacks strong, unique identifiers. Based on these research findings, there is a need to identify specific destination experiences, as the current statement does, and to make a clear connection to how the destination’s citizenry differentiates the larger visitor experience.

The previous positioning statement utilized by GRCVB was effective in identifying the significance of Raleigh as North Carolina’s capital city; however, it quickly turned vague by listing assets that are not exclusive to Raleigh. This is why it is recommended that this statement define unique destination attributes and relationship dynamics that allow prospective visitors to grasp the significance of:

- The impact of a well-educated and smart local population,
- Raleigh’s superb quality of life, and
- An entrepreneurial environment that breathes life into local tourism experiences.

The new positioning statement maintains and confidently proclaims Raleigh’s status as a capital city, but it goes further in explaining that Raleigh has been developed directly by a community that is committed to creating and nurturing a strong quality of life. This same passion is what propels the development of North Carolina’s best cultural assets and a growing lifestyle scene that is introducing new visitor experiences among restaurants, the arts, live music options and retail. Smart and independent thinkers who call Raleigh home fuel this thriving city. This allows Raleigh to stand apart from other regional competitor destinations that instead leverage their heritage—whether it is bourbon, NASCAR or horseracing.

DESTINATION VALUE PROPOSITION STATEMENT

Visitors to Raleigh will leave feeling enriched and energized by their experiences—whether dining/food, event/festival, music or sports experiences—thanks to the investment made into this historic capital city by a smart, passionate, inventive local population.

There was no evidence of an existing value proposition statement to assess.

In articulating a recommended value proposition statement, it is important to identify and confidently assert what is unique and compelling about the destination that will provide value to the visitor.

When assessing the research, a bold statement emerges. Although it is a historic capital city, Raleigh is not set in its ways. A smart and savvy local population provides the spark that ensures that Raleigh continues to evolve. They create an environment that leaves travelers feeling enriched by their Raleigh experience. It provides a compelling reason for consumers to consider and, ultimately, visit Raleigh.

This statement continues to zero-in on the defining relationship between the destination and the personalities driving growth and innovation. By emphasizing words such as enriched, smart and passionate, Raleigh will further define the consumer audience, which is the destination's primary target.

The distilled message in this statement refers to the destination experience. This experience ultimately leads to the enrichment a traveler (either leisure or business) will encounter in Raleigh but not necessarily in other Southern destinations. This strong and clearly defined approach will provide internal and external audiences a unified identity that links the contributions of the local community with destination marketing efforts.

The statement creates an impression that something significant and appealing is occurring within the destination. Although locals enrich the destination, it also implies that every visitor will leave enriched by the experience. Furthermore, given the national consumer testing conducted, feeling "energized" closely resembles the feelings cited in DCI's survey—33% report feeling "excited" after their visit to Raleigh, followed by 30% who felt "entertained" after their visit.

DESTINATION BRAND PROMISE STATEMENT

Visitors to Raleigh will depart feeling enriched by what they have experienced in this Southern capital city, thanks to Raleigh's smart and passionate residents who are shaping the growth of the historic city's emerging creative businesses, innovative festivals and food establishments, passionate music and sports scenes and modern cultural experiences.

The previous brand promise statement contained elements that are certainly accurate identifiers and align with research findings presented in the discovery phase. "Smart," "historic" and "burgeoning" are absolutely true of Raleigh. What the statement lacked was a promise to the visitors about what they will take away from their experience in Raleigh. Furthermore, destination marketing strategy has matured into a science; statements such as "one-of-a-kind" and "can't miss" are vague and have fallen out of favor as descriptors anywhere.

The revised brand promise serves to clearly articulate what was also communicated in the value proposition. Thanks to Raleigh's passionate residents, this historic capital city is not a relic of days gone by. Rather, Raleigh's residents have put their brainpower to work—to regularly reinvent the businesses, festivals, events, culinary, craft brew, music and sports scenes. Raleigh is not a historic city that lies stagnant but rather one that changes to continually meet the needs of savvy locals, which in turn benefits travelers. In fact, many of Raleigh's best visitor assets have organically grown due to the community's commitment to developing a culturally rich and appealing place to live. As a result, when a traveler experiences Raleigh, she departs enriched.

Unlike regional competitors who rely on history and heritage, promising a sense of nostalgia or sense of Southern and American pride, Raleigh promises a different approach to motivating visitor interest. Raleigh is committed to innovative, forward-thinking experiences that afford visitors the opportunity to learn and depart enriched by the experience.

KEY MESSAGING—DEFINING THEMELINES

Smart: Continually fueled by one of the world’s most significant research and educational epicenters, Raleigh benefits from a stream of savvy students- and professionals-turned-residents who are collectively driving the city and area’s cultural renaissance forth, creating experiences for enrichment and learning.

A Modern Establishment: Driven by the desire to innovate, a pursuit of prosperity and the need to live well, Raleigh’s community is embracing a modern vision for its historic capital city area. This has given life to business big and small, new music, arts and cultural experiences that join Raleigh’s existing cultural assets, expansive green spaces and institutions to create an appealing destination.

Undiscovered: Raleigh’s unassuming stature as a destination has allowed it to develop organically and sustainably, evolving naturally for the greater good of those who live here and those who will visit. It is that genuine element that defines many of the destination’s handcrafted experiences and provides the visitor with an assurance that discovery in Raleigh will always be authentic and unique—qualities rarely found in today’s more established destinations.

As noted in the analysis of the brand promise statement, the four previous themelines used by GRCVB also can benefit from a refresh. Raleigh and its target consumers have evolved since the original themelines were created. The major deficit in the 2008 themelines is an evident cause-and-effect relationship, which helps explain and convince the audience that Raleigh offers a “dynamic” or “unexpected” experience and illustrates why that should matter to the consumer.

In today’s competitive environment, these original themelines fall short. The new themelines provide enough detail and connection to a progressive, smart and forward-thinking Raleigh—a Raleigh that offers travelers opportunities for learning and enrichment, which lead to an enjoyable Raleigh getaway.

The themelines were developed to provide GRCVB with guidance on the overarching message points that can be expanded and incorporated into future marketing communications. Each of these major themelines encapsulates the strongest and most

favorable attributes highlighted in the promise or strategy phase and is rooted in the internal and external stakeholder research revealed in the discovery phase.

Smart: One of the most unique attributes of the Raleigh area is the strong educational and research presence. The previous themelines did accurately identify Raleigh's location with the greater academic and research communities that exist in the area; but they missed an opportunity to own and embrace the benefits of such a rich academic and research community. The previous statement lost focus and moved away from owning this perceived benefit. For example, the latter part of the statement referenced the potential benefits Raleigh's academic and research communities could have on "packaging and communications"—elements that seem to favor a destination marketing approach rather than explaining the tangible benefits to an external audience. The recommendation calls for a closer and better-defined relationship between the prevalence of these institutions and what it means to the visitor.

Indeed, many area colleges and universities as well as the Research Triangle Park (one of the many local economic drivers for Raleigh) have bred a community of smart residents. Smart residents have blossomed into a community of entrepreneurs whose passions extend well beyond the founders of technology-focused businesses. A smart community is indicative of equally smart, local cultural and lifestyle experiences built by its residents, for its residents. The result is an authentic and favorable quality of life experience that GRCVB can leverage to lure visitors to the destination, offering something different from that of its regional competitors. Entrepreneurship now permeates the arts, culture, cuisine, festivals and consumer products through companies and events such as The Curatory at the Raleigh Workshop, Hopscotch Music Festival and the Videri Chocolate Factory, to name a few.

A Modern Establishment: Defining Raleigh as modern is a powerful idea, especially while not losing sight of Raleigh's historic context as a capital city. The concept of the "New South" has caught on, and cities like Charlotte have gained market share. Nevertheless, Raleigh uniquely benefits from both deep roots as a capital city and aggressive modernization. The educational and demographic landscape in the Raleigh area points to a community that is modern by nature—it is home to students, young families and a cutting-edge technological and scientific sector—all of which are found within this deeply historic city established in 1792. "A Modern Establishment" is a statement that Raleigh can own among its competitive set.

Undiscovered: This themeline seeks to entice an educated, lifestyle-seeking visitor to come to Raleigh to uncover destination experiences that have grown organically. Unlike competing destinations, Raleigh’s music venues, craft beer pubs, retail and lifestyle offerings aren’t contrived to cater to the demands of visitors but rather created to appeal to the tastes of local residents. This makes them unique to the community in which they exist. Raleigh’s appeal is directly connected to its “underground” and “below the radar” experiences that savvy visitors are motivated to discover. Through the process of discovery, visitors join a community of smart and enterprising locals who are in the know about where to go, what to do and when to do it.

DESCRIPTION OF TARGET AUDIENCES

Strategic target audiences were defined by taking into account what uniquely defines Raleigh and what sets the destination apart from its competitive set. Psychographic profiles of target audiences have been identified for the purposes of this process as: the Backyard Booster, Lifestyle Chameleon and Pulse Keepers. These descriptions are intended to define the motivations for visitation rather than any specific purpose of visitation, as those can vary and overlap.

These profiles are further qualified after having analyzed demographic and select psychographic insights provided by GRCVB's existing consumer research.

Such qualifications include:

- specific cities where visitors originate,
- the type of visitation (i.e., leisure, corporate, or meetings and convention),
- annual household income,
- party size, and
- desired spending based on type of visitation.

The target audiences identified include the Backyard Booster, Lifestyle Chameleon and Pulse Keepers audiences, all of which are largely represented among existing visitors to Raleigh. They have been identified by GRCVB and in the consumer profiles collected recently. Specifically, when reviewing the "2010–2012 Raleigh Visitor Profile" prepared by D.K. Shifflet & Associates Ltd., both day and overnight visitors queried and identified within the "lifestages" analyses fall within descriptors that align with the age groupings and reasons for visit identified within the Lifestyle Chameleon and Pulse Keepers audiences. Day visitors were found to most likely belong to cohorts without children—"Young and Free," followed by the "Affluent Mature" and "Maturing and Free." Overnight visitors are similar and are represented in the two largest categories—"Young and Free" and "Affluent Mature."

The research conducted for the purposes of this project shows that visitors and potential visitors surveyed also noted high marks for Raleigh on amenities and experiences that appeal to cohorts without children. These experiences were identified as an opportunity to relax and recharge, to immerse themselves in authentic, local culinary and beverage offerings, and to immerse themselves in cultural offerings (e.g., music, arts, museums etc.).

Raleigh also rates highly in related categories. Rated on a scale of 1 to 5 (where 1 is not available and 5 is readily available), Raleigh rates highly on the availability of “diverse restaurants, culinary and beverage offerings” (3.8), “abundant and unique cultural offerings” (3.8), “abundant and diverse retail and shopping options” (3.8) and “an array of events and festivals” (3.7). These descriptive elements will drive visitors represented by all three target audiences described below.

“Family-friendly” was a key theme that was repeatedly seen as a strength of the area yet is not strongly evidenced in the D.K. Shifflet visitor profile. Families are represented strongly in the Lifestyle Chameleon and the Backyard Boosters audience recommendations. The description of Raleigh that most resonated with respondents in DCI’s report was “a family-friendly destination and place to live, with a wealth of museums, festivals, live performances, parks and lakes.” Reconnecting with family and possessing family-friendly activities are identified as key considerations in deciding whether to visit a destination, and Raleigh is perceived as having a strong foundation and base of these attractions in past studies. The Backyard Booster audience is most likely to encompass the range of demographics evident in the Raleigh area. Because targeting a local audience is likely a new approach for the GRCVB, we will work to define ways in which to identify, leverage and benchmark against outreach efforts undertaken. For the purposes of this brand refresh study and blueprint development, psychographic audience types are more specifically defined next, and they are cross-referenced (in table format) with the brand themelines and GRCVB functional activities that most relate.

THEMELINE TARGETS

	WHO TO TARGET	BACKYARD BOOSTERS: Age Groupings: Active Baby Boomer, Generation X, Millennials, Families Reason to be in Raleigh: Education, Recent Relocation, Visiting Friends and Relatives	LIFESTYLE CHAMELEONS: Age Groupings: Active Baby Boomer, Generation X, Millennials, Families Reason to be in Raleigh: Leisure, Corporate or Business	PULSE KEEPERS: Age Groupings: Generation X, Millennials Reason to be in Raleigh: Leisure, Special Event
HOW TO TARGET				
SMART	Tourism Marketing	Tourism Marketing Meetings Sales	Tourism Marketing Meetings Sales Sports Marketing	
A MODERN ESTABLISHMENT	Tourism Marketing	Tourism Marketing Meetings Sales	Tourism Marketing Sports Marketing	
UNDISCOVERED	Tourism Marketing Sports Marketing	Tourism Marketing Meetings Sales	Tourism Marketing Meetings Sales	

AUDIENCE 1: BACKYARD BOOSTERS

Age Groupings: Active Baby Boomer, Generation X, Millennials, Families

Reason to be in Raleigh: Education, Recent Relocation, Visiting Friends and Relatives

Description: Whether in Raleigh for the purposes of attending school as a student, relocating for job opportunity or visiting a relative or friend who lives in Raleigh, the Backyard Booster is an individual who has an existing relationship with the destination that is rooted in a direct, personal connection. Likely well-educated and well-informed, the Backyard Booster may have a weak to strong familiarity of the Raleigh area depending on actual location of residence, but they are aligned in the fact that they are regularly seeking experiences and new “things to do” that allow them to engage with other residents like themselves who are in pursuit of enrichment. Raleigh’s emerging downtown, festivals and nightlife are most likely to be the Backyard Booster’s destination of choice for entertainment, but the audience is also interested in sporting events, nature experiences, culture and museums. The Backyard Booster can be the destination’s biggest ambassador or can be its greatest detractor among his sphere of influence.

The Backyard Booster has the greatest potential as an ambassador for the area—this group is influential in telling the destination’s story via word-of-mouth. Those in their younger years are likely to travel outward or relocate at some point in their educational or business trajectory and will carry with them positive stories of their time in Raleigh. Those families who have settled in the area from outside have the ability to drive visitation from friends and relatives, showcasing the destination’s compelling story on social media platforms. While this target audience is not likely to impact overnight stays in hotels, they are the most influential in augmenting Raleigh’s brand reputation, which will in turn drive visitor arrivals from those without a direct connection to Raleigh’s residents.

AUDIENCE 2: LIFESTYLE CHAMELEONS

Age Groupings: Active Baby Boomer, Generation X, Millennials, Families
Reason to be in Raleigh: Leisure, Corporate or Business

Description: This group is characterized by their preference to “do as the locals do,” blending in with the local community. The Lifestyle Chameleons’ travel preference is largely influenced by national and lifestyle consumer media trends, word-of-mouth recommendations from like-minded locals and a deep desire to discover destinations that offer significant, authentic lifestyle experiences that are genuine. These types of experiences include visiting local craft breweries, shopping at locally owned small businesses as well as attending locally popular music venues, art galleries, arts and cultural festivals and perhaps one or two museums of note. These are experiences that allow them to depart enriched with “inside knowledge.” Typically this visitor favors cosmopolitan activities rather than spending time in active outdoor pursuits or in nature. The Lifestyle Chameleon will purposely avoid activities that are “touristy” and instead plan to visit and spend on experiences that she perceives as local favorites. This visitor is likely to “show off” via social media and post about her experiences while visiting.

Lifestyle Chameleons will have interest in Raleigh’s emerging lifestyle experiences fostered authentically by locals. If Raleigh will be a leisure visit for them, they are targets for overnight hotel stays. They can be influenced to do so by showcasing how an overnight stay in Raleigh is the only way one can truly fit into the scene and depart feeling like an insider.

AUDIENCE 3: PULSE KEEPERS

Age Groupings: Generation X, Millennials
Reason to be in Raleigh: Leisure, Special Event

Description: Pulse Keepers are a growing audience for Raleigh, given a rising music, live event and festival scene. This visitor is likely a repeat visitor to Raleigh, visiting for the purpose of a special event or to enjoy cultural offerings or nightlife in the capital city. They enjoy activities centered on arts and entertainment including local beer, food and retail. Likely a resident of North Carolina or the Southeastern U.S. region, the Pulse Keeper maintains friendships either in or around Raleigh. They are most likely to travel with friends while visiting. Constantly seeking an authentic entertainment scene

intended for “locals,” this visitor is keeping his finger on the pulse of developments that resonate with an under 40 audience, while enjoying experiences such as music festivals, concerts and niche events.

For Pulse Keepers, Raleigh will be the backdrop for how they consume cultural experiences that enrich their lives. A strong opportunity exists to leverage their collective voice through social and digital engagement, as well as content creation, curation and distribution through select ambassadors or local influencers, perpetuating Raleigh’s storytelling efforts to this target audience.

DEFINING COMPETITIVE MARKETS

A key step in the promise/strategy phase was the analysis of the recommended brand strategy for Raleigh, N.C., in relation to the brand strategies of competing destinations to ensure its uniqueness and thus potential to be effective in generating increased awareness, visitor arrivals and spending. A total of six destinations were assessed: four major competing and two intraregional destinations were assessed within the scope of this project and included:

- Baltimore, Md.,
- Chapel Hill, N.C.,
- Charlotte, N.C.,
- Durham, N.C.,
- Louisville, Ky., and
- Richmond, Va.

These destinations were selected based on insights provided during the discovery phase. Each destination is located in the Southeastern U.S. region, and each major competing destination is comparable in size and scope of leisure and business tourism (meetings and convention) destination services and experiences.

METHODOLOGY

The information available from each of these destinations ranged considerably. While some provided DCI with a completed brand strategy platform and vision statement by request, others offered no more than organizational vision or mission statements available on their website. In cases where specific brand statements could not be sources, DCI analyzed information available via third parties, including media, and statements made in advertising or marketing award entries and plans. These help DCI understand the competing destinations’ positioning and marketing approach.

Baltimore, Md.

Baltimore, a bustling city built on tradition and civic pride, is an American success story. Baltimore—the colorful, diverse city that is Maryland’s largest city and economic hub, is known for its beautiful harbor; quirky, distinct neighborhoods; unique museums and the world-renowned Johns Hopkins Hospital to the east and the University of Maryland Medical Center to the west. With the rich history the city boasts however, it’s amazing that Baltimore hasn’t been deemed one of America’s greatest historical destinations.

Competitive Assessment:

Baltimore’s destination positioning relies heavily on its reputation as an American harbor city, built by the heavy lifting of its historic citizens. Tradition is important, and it anchors the visitor experience, even though modern developments, namely the city’s large medical-related assets, are mentioned. While rooted in history, Raleigh’s positioning capitalizes on the “smart,” “modern” and “innovative” talents of its current residents. These talents impact the experiences that await visitors to Raleigh.

Chapel Hill, N.C.

In a world where everywhere is beginning to look like anywhere else, Chapel Hill has been able to maintain a sense of its history without being stuck in the past. It’s a vital, growing, changing town, but one that’s learned how to leave what’s good alone.

“The Edge of the Triangle”

“Travel to the fringe of mainstream when visiting North Carolina’s Research Triangle. Chapel Hill’s sights, sounds and tastes are worth discovering.”

Competitive Assessment:

Chapel Hill’s brand statement, brand promise and slogan carefully balance the idea of a historical and traditional place without sacrificing the idea of a vibrant, changing place. Ultimately the statements are intriguing; however, vague and generic destination experiences do not effectively connect what visitors can do with how the destination’s past or “vital” present and future contribute to the visitor’s experience. As a self-described “town,” Chapel Hill is not staking its claim as a city, which Raleigh does, allowing the two destinations individual distinction. Additionally, while Raleigh claims its historic roots, it also focuses on establishing a strong connection between quality of life, the specific benefits of being located in North Carolina’s Research Triangle and what this means for Raleigh’s visitors.

Charlotte, N.C.

With its warm, friendly people and inviting Southern hospitality, Charlotte is a clean, beautiful and diverse contemporary city that is a dynamic financial center with a strong can-do spirit. With its trees, lakes and green open spaces, the region is steeped in NASCAR racing heritage and a commitment to family and faith that embraces the innovative, preserves traditions and offers a superb quality of life.

Competitive Assessment:

Charlotte's brand promise capitalizes on its position as a contemporary "New South" city with a tie to NASCAR. Language including "Southern hospitality," "friendly," "family," "faith" and "heritage" are the most prevalent attributes which frame the visitor experience. Although it wants to be known as a city, it emphasizes its ties to the country with references like "trees, lakes and green open spaces," as well as NASCAR. While Charlotte's positioning contains parallels to the brand positioning recommended for Raleigh, including "superb quality of life" and "embraces the innovative," these serve as closing thoughts rather than a primary focus. Raleigh has an opportunity to own these themes by reinforcing how they contribute to the visitor experience, while also owning the "smart" themeline that positions the destination as an enriching place of learning.

Durham, N.C.

Durham is a colorful, creative and entrepreneurial community where diverse and passionate people come together to shape a better world, and a place that visitors, residents, students and businesses find enriching, accepting and engaging.

"Where great things happen."

Competitive Assessment:

Durham's positioning statement, of all of the major and in-state competitors reviewed, does the most similar job of connecting the characteristics of the local community with the environment and type of experience offered to visitors. More altruistic than the recommended brand positioning put forth for Raleigh, Durham leverages its entrepreneurial community, diversity and embraces a large range of visitor profiles. Durham's physical location and actual lifestyle experiences are not defined in the statement, however. Furthermore, Durham is a smaller competitor to Raleigh, allowing Raleigh to have a larger platform to communicate the recommended brand messaging if adopted. Since "smart" and the identification of a high quality of life are not explicitly communicated in Durham's statement, Raleigh will have an opportunity to own these aspects. Smart people achieving a good quality of life through innovative ideas lead

to visitors leaving Raleigh fulfilled, learned, excited and experienced—the essence of Raleigh’s brand promise.

Durham employs the words “entrepreneurial,” “passionate” and “enriching” in its brand position—words that are similar to those employed in the brand positioning and promise recommendations for Raleigh. This is not surprising given that Durham is a neighboring city and shares many of the same businesspeople, patronages and attributes of the region. It can be noted that, where Raleigh is a place focused on a good quality of life, Durham’s overall brand positioning places the emphasis on a more altruistic existence.

Louisville, Ky.

Welcome to a city where dreams get introduced to can-do. Where people share a belief in the creative power of opportunity, expression and imagination. Alive with potential and inspired with a progressive spirit of possibility and aspiration, Louisville is a very special place—somewhere between “way out there” and “feels like home.”

Possibility City: Somewhere between “anything goes” and “feels like home”

This isn’t just “a place to live,” it’s a place to really live. It’s a town without excuses, blissfully free of the hang-ups and holdups that keep things from happening. It’s a place where blue-sky thinking meets grassroots can-do. It’s a city without limits. Anything’s possible here in Louisville.

“Especially you.”

BOURBON COUNTRY®

The marketing vision of the “Bourbon Country” brand began in 2007 as developed by LCVB in cooperation with the Kentucky Distillers’ Association (KDA) and the support of other DMOs in the region. The Bourbon Country regional marketing team now includes eight destination management organizations covering nine counties and the Kentucky Department of Travel and Tourism.

Competitive Assessment:

Louisville has a complex destination marketing landscape. Overall, the city’s strategic brand approaches generally deliver the message that Louisville is exciting, imaginative and limitless. This belief has resulted in an urban renewal of the city, driven by the development of experiences designed specifically for visitors. Yet at the root of renewal is the city’s unique position as the gateway to America’s bourbon story. Louisville owns “bourbon” like Raleigh owns “smart.” Since “smart” isn’t something you can see or

taste in the traditional fashion, Raleigh’s brand strategy platform digs deep to profile how “smart” enriches the Raleigh visitor experience. While Louisville’s approach is to dream then create, Raleigh’s approach is more organic, independent and specific to sustaining the local quality of life.

Richmond, Va.

“RICHMOND REGION: EASY TO LOVE”

From the 17th century to the 21st, history is around every corner in the Richmond Region. Add to that museums, breathtaking architecture, a vibrant arts community and a bustling nightlife, and the Region is sure to entertain and enlighten year round. Historic buildings and world-class museums nestle next to new structures designed to harmonize with the past even as they define the future. Fun, affordable and accessible, Richmond offers the benefits of a big city and the warmth of a small town. There are trendy areas and endless pockets of discovery—all in a historic setting that reminds us of who we are as Americans.

Competitive Assessment:

Richmond’s messaging provides a vivid illustration of the destination and profiles the breadth of experiences rooted in a proud history. It wants to be known as a historic “small town” that’s easy to navigate yet offering big-city amenities to travelers such as “world-class museums.” Richmond’s goal is to ensure that the visitor leaves “enlightened.” This differs from Raleigh’s recommended positioning. While Raleigh should note its historic place as a capital city, history should not serve as the cornerstone of Raleigh’s appeal to visitors or the primary draw for travelers to the city. Instead, Raleigh should emphasize how the city’s organic growth, inspired by the passion of smart, local residents, has created an environment that leaves visitors feeling enriched when they depart.



08

PROGRAM
RECOMMENDATIONS



What we're seeing now is a search for the authentic in a world that too often seems homogenous and already discovered. The movement is opening more destinations to visitors, and doing so without forcing the places to mimic the charms of top destinations."

From Jason Clampet's *Megatrends Defining Travel in 2015*

Program Recommendations

IT STARTS FROM WITHIN: LOCAL AND INDUSTRY ENGAGEMENT

Promoting a refreshed Raleigh, N.C., destination brand locally will ensure success when extending and applying the brand message outward into the market. Research showed a vast opportunity to entice and engage local stakeholders, residents, college students, non-tourism businesses and tourism or hospitality businesses alike. Effectively engaging and promoting this destination brand strategy will ensure that local ambassadors are created and, most importantly, are actively involved in embracing and promoting the uniqueness that is the Raleigh, N.C., destination.

Raleigh, N.C.'s refreshed destination brand will need to reach every corner of the hospitality sector in the area in order for positive impacts to accrue to the destination. As such, the brand acculturation process is one that primary stakeholders and civic and organizational leaders must champion locally to ensure that the value and benefits of the brand strategy laid out in this blueprint are embraced and espoused by locals and businesses that share in the responsibility to promote and champion the Raleigh area.

GRCVB is a champion of tourism marketing and the steward of destination promotion for Raleigh and Wake County; as such, there is a responsibility not only to communicate the success of its programs, direct financial impacts and metrics but also to shepherd the destination brand message throughout the area. DCI has developed a list of recommendations in this section to provide GRCVB, as well as other community organizations, a focused approach to grow proponents of the refined brand strategy.

1. Tools for Success: An Expanded Raleigh, N.C., Brand Kit
2. Line up the Loudspeakers: Creating Brand Ambassadors
3. Power to the People: Public Affairs
4. Taking it to Town: Town Relations and Communications
5. Waving the Raleigh Flag: Increasing Affinity in the Tourism and Destination Marketing Sector
6. Maximizing Meetings Messaging: Ways to Extend the Message to this Key Group
7. Prioritizing the Entrepreneur: Embracing Local & Small Business

The details of these recommendations were absorbed by GRCVB leadership and staff and will be integrated into annual marketing plans in subsequent years.

MARKETING RALEIGH, N.C., IN A COMPETITIVE SPACE: MARKET ENGAGEMENT

Raleigh, N.C., is now poised to enter the market with a specific and focused brand strategy that is not only rooted in research but also has been responsibly communicated and embraced by local and internal stakeholders.

Defining and implementing marketing strategies and tactics that align with the strategic brand platform expressed in this blueprint is essential to ensuring that the destination can be competitively positioned and can be effective at communicating the destination's story to drive visitation. This section features content and strategies that can be applicable to both consumer and business-to-business audiences.

Recommendations for how to tell, reinforce and expand Raleigh N.C.'s destination story utilizing a diverse marketing mix and a variety of channels follows in this section.

1. Flexing the Power of Paid: Advertising & Digital Marketing Opportunities
2. Opportunities to Optimize Owned Channels: Website, Blogs, Email Marketing & More
3. Earned Media: Expanding Raleigh's Destination Story
4. #VISITRALEIGH: Raleigh in the Influencer Space
5. Camera, Lights, Broadcast: A Focused Approach to Achieving a Specific Broadcast Message
6. Mobilizing the Masses: Recommendations for Social Engagement
7. Maximizing Sports Marketing: Increasing the Appeal for Raleigh

The details of these recommendations were absorbed by GRCVB leadership and staff and will be integrated into annual marketing plans in subsequent years.



09

MEASURING SUCCESS

Measuring Success

The refined destination brand strategy presented in this Marketing Blueprint is the first step toward developing and implementing annual marketing plans that will work to consistently and effectively deliver the brand message and tell Raleigh, N.C.'s story. In addition to assessing visitor metrics including hotel occupancy rates, tax collections, airport arrivals and meetings and convention leads, bookings and economic impacts, it is important to measure perceptions and opinions among consumers, media and stakeholders as it relates to the Raleigh, N.C., brand platform defined during the blueprint process.

- Measuring consumer perceptions via national perception studies will assist in understanding destination awareness, perceptions and key phrases and experiences associated with Raleigh, N.C.
- Measuring engagement across owned, social and paid channels will provide insight on whether the stories, personalities and experiences are influencing actions and engagement. Specific examples of this include video content engagement on YouTube; shares, comments and likes on Facebook; average time spent on owned digital platforms; open and click-through rates for email marketing; and relevant performance metrics across other owned, social and paid marketing channels.
- Recurring media audits, which assess the penetration rate, content and tone against the "Most Wanted Media" list and key messages, are a recommended measurement for assessing the effectiveness of an earned media strategy. Evaluating whether some or all of the key themes and destination identifiers are included in earned media placements can help track the effectiveness of the dissemination of the brand platform.
- Digital influencer and content growth are telling measurements of a destination's rise in influence and prestige. Tally up the impressions, number and types of content generated through local ambassadors, digital influencers or content creators telling stories about Raleigh, N.C., through their own social and digital channels.
- Industry and community relations touch points such as the number of presentations, brand strategy documents disseminated, trained ambassadors and other indicators represent how many local tourism sector stakeholders are being educated about the revised destination brand strategy for Raleigh, N.C., and being influenced to continue to tell the Raleigh brand story to others.

MEASURES AND INDICATORS

After a project such as this, it is important to measure and gauge results of program activities. DCI recommends surveying both internal and external audiences every three years in order to track results and in order to identify those elements that may need additional focus and attention using the questionnaires developed over the course of this project. In the interim, questions can be added to a statewide public opinion poll to periodically gain input from North Carolina residents (a primary geographic market).

Representative questions can include:

- On a scale of 1 (poor) to 10 (excellent), please rate Raleigh's appeal as a tourism destination.
- Have you seen any advertising or other information promoting Raleigh as a tourism destination within the past six months? If yes, what was the most recent information you recall seeing?
- Are you currently following the Greater Raleigh Convention and Visitors Bureau (@visitRaleigh) on any social media channels?
- What characteristics or traits do you associate with Raleigh as a destination?
- What are the top five experiences you associate with Raleigh?
- On a scale of 1 (poor) to 10 (excellent), please rate Raleigh's uniqueness as a destination and appeal within the larger Southeastern U.S. region.



10



CONCLUSION

Conclusion

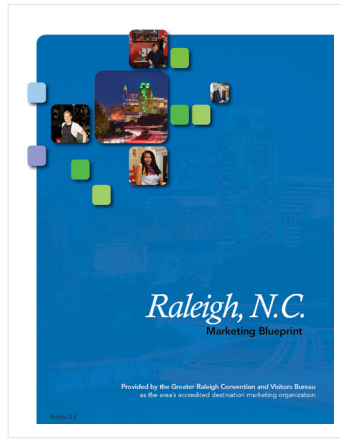
It has been a pleasure to work with GRCVB and the Wake County tourism community to refine and redevelop the destination's brand strategy platform. Raleigh, North Carolina, is poised to grow as a tourism destination largely due to its energetic and passionate residents, business owners and civic leaders. They love where they live and are motivated to maintain and improve their quality of life. New hospitality, music, cultural and retail experiences are rising up within Raleigh, Cary and Wake County, all of which are fueled by smart, passionate locals and entrepreneurs.

The extensive research conducted in the discovery phase reveals that Raleigh is widely regarded and respected for being a family-friendly place and a place that leaves visitors feeling excited. Among media and meeting planners, the opportunity to raise the destination's profile is vast. While many have had limited exposure and experience visiting or selling Raleigh, North Carolina, awareness about the destination centers on positive associations with the Research Triangle Park, area colleges and universities and the appeal of the area as a place to live.

As cited throughout this Marketing Blueprint, skift.com refers to the rise of the "boutique destination" in its annual trends report titled "Megatrends Defining Travel in 2015." Raleigh, N.C., is the ideal boutique destination. Authentic, local experiences are abundant here. The destination's fabric is continually expanding. Local innovators who care deeply about their communities are piloting this expansion, which indirectly leads the creation of unique visitor engagement opportunities that have yet to be discovered.

The refreshed destination brand strategy presented in this Marketing Blueprint takes into consideration the large competitive advantages, opportunities and differences between Raleigh, N.C., and its closest competitors revealed in our research. This blueprint highlights the unique attributes of Raleigh, North Carolina, and builds a thorough brand platform that allows GRCVB, the destination brand steward, to consistently deliver the destination's compelling story to target audiences.

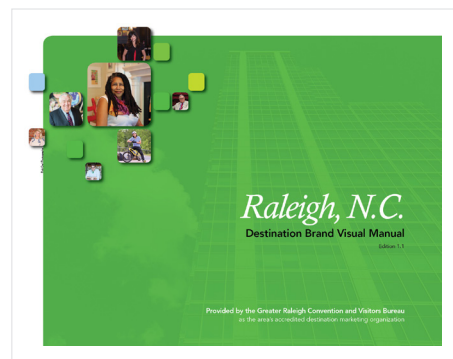
We wish GRCVB much success in implementing and expanding this refreshed destination brand platform. Raleigh is a home to an innovative and passionate population that is sure to stand alongside the destination's marketing leaders in promoting and propelling the destination forth.



This **Raleigh, N.C., Marketing Blueprint** is one of a three-part series of Raleigh, N.C., Destination Brand Guides.



Raleigh, N.C., Destination Brand Strategy Manual



Raleigh, N.C., Destination Brand Visual Manual

The series may be found at:
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