









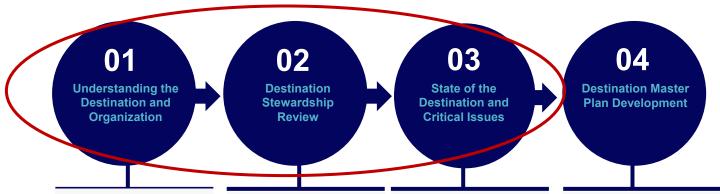


AGENDA

- 1. Destination Performance
- 2. Visitor Profile and Composition
- 3. Destination Products/Activities Evaluation
- 4. Sustainability Issues



The Process



- ✓ Immersion Tour & Stakeholder Workshops
- ✓ One-on-One Stakeholder Interviews
- ✓ Product Assessment
- ✓ Organization Evaluation
- ✓ Other Research and Discovery Inputs from Phase 1 of the Branding Process

- √ Review of stewardship and sustainable practices currently being employed in the destination
- ✓ Interviews with relevant land management organizations and individuals, and other relevant parties

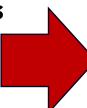
- ✓ Integration of Findings
- √ State of the Destination Summary
- ✓ Critical Issues Identification
- √ Consensus Building Around Critical Issues

- √ Vision and Mission Statements
- ✓ Strategies and Tactical Steps to Address Critical Issues
- ✓ KPI Metrics to Evaluate Progress



TODAY - Testing Critical Issues

- What Makes Sense?
- Where Are We Off?
- What Are We Missing?



NEXT - What Do We Do About It

- Strategy Goals/Pillars
- Objectives
- Tactical Recommendations



Input Informing Consultants (as of 02.26.2024)

9

Public Land Officials workshop

12

Steering Committee kick-off meeting

22

1:1 interviews with **key stakeholders & elected officials**

78 1282

Participants in community focus groups & workshops

Stakeholders, visitors and travel media **survey responses**

Destination Performance

Visitor Spend Trends



Visitor Spending Growth in Haywood County

- Resilient through 2020's COVID-19 impact, with a much more moderate decline compared to the state.
- 2022 saw a 50% increase in visitor spending from 2019, reaching \$336 million—significantly outperforming the state's growth.
- This increase saved the average resident \$379 annually in taxes, 2/3 higher than the state average.

Visitor Spending (millions)

	2019	2020	2021	2022	2022 v 2019	
Haywood County	\$223.05	\$217.13	\$323.33	\$336.13		
% Change		-2.7%	48.9%	4.0%	150.7%	
North Carolina Total	\$29224.59	\$19959.29	\$28919.8	\$33326		
% Change		-31.7%	44.9%	15.2%	114.0%	

Source: Visit NC & Tourism Economics

Hotel Inventory

dci

Number of Properties	50
Number of rooms	1,806
% Rooms Nationally Branded	33%
% Properties 75 rooms+	30%
Most recent new construction (Days Inn)	2004
# Updated in last decade	8
# Under Construction (Hampton)	1

Source: STR

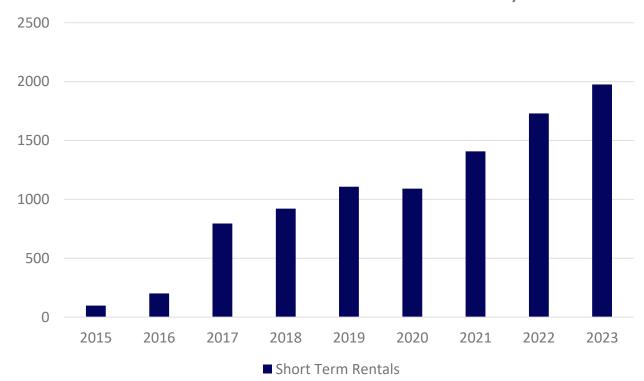
The Rise of Short-Term Rentals



Inventory and Performance Insights

- STR inventory saw an 81% increase from 2021 to 2023, significantly expanding post-2017.
- Room night demand increased by approximately 9% in the last year, with ADR and occupancy showing consistent performance across key areas.

Short Term Rentals Year End Inventory



Balancing Weekend and Seasonal Demand

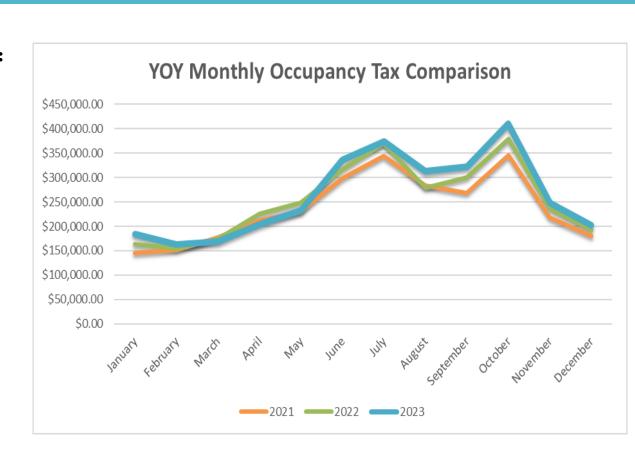


Weekday vs. Weekend Occupancy:

Focus group feedback highlights a pattern of mid-week availability contrasted with weekend occupancy peaks—typical of leisure travel destinations. Addressing this gap can help even out occupancy rates throughout the week.

Seasonal Visitor Distribution:

 Visitor data shows higher activity in summer and fall with potential to boost winter and spring visitation, extending the tourism season and balancing yearly visitation.





STRENGTHS

Visitor Spending Growth:

Haywood County has seen a notable increase in visitor spending since 2019, outpacing the state average, driven by a robust short-term rental market.

Economic Contribution:

The visitor industry has brought significant tax benefits to Haywood County residents, exceeding state norms. Highlighting these benefits can enhance resident understanding of the importance of the visitor economy to our community

Meeting the needs of Visitors:

The expansion of Haywood County's STR inventory, alongside rising demand, has been pivotal in driving robust visitor growth. This trend underlines the STR market's success in meeting visitor preferences, resulting in substantial and steady increases in visitor spending.



OPPORTUNITIES

> Accommodation Modernization:

While some of hotels in the county have undergone updates and renovations, the most recent brand-new construction occurred 20 years ago. Modernization is needed for the destination to speak to today's visitor expectations.

> Diversifying Lodging Options:

While positively attracting guests, the rise in short term rentals have shifted demand away from hotels, making it more challenging to attract interest in development of additional hotels or diversified lodging options.

> Sustainable Practices:

The prevalence of short-term rentals presents a challenge for implementing sustainable practices in accommodations, an area ripe for innovation.

> Workforce Housing:

The rise in short-term rentals, while occurring in a wide range of property values, has most likely contributed to escalating housing costs and availability for industry workers. Developing county-wide solutions to maintain affordability is crucial for sustaining a diverse workforce.

➤ Strategic Opportunities for Growth: The identified weekday and seasonal imbalances underscore the need for targeted strategies to boost off-peak visitation. Initiatives could include developing mid-week attractions and promotions, as well as enhancing marketing efforts to showcase Haywood County as an appealing year-round destination.



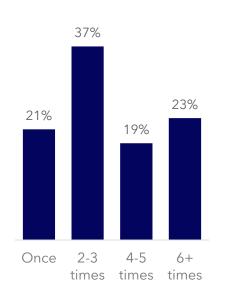
- ➤ With the mix of older hotels and new STRs, how do you envision the future landscape of our visitor industry? Are there specific changes or improvements you'd like to see?
- >What innovative ideas or strategies do you think could encourage more weekday or shoulder season visitation?

Visitor Profile & Composition

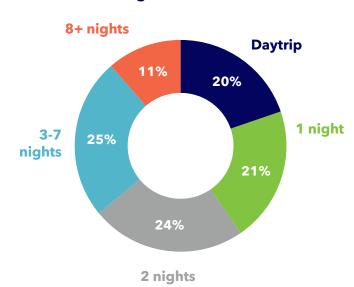


There is a **high level of repeat visitation** and a **strong overnight visitation** of 3+ nights among current visitors.





Length of stay during most recent visit



Fully

79%

are repeat visitors to Haywood County

Only

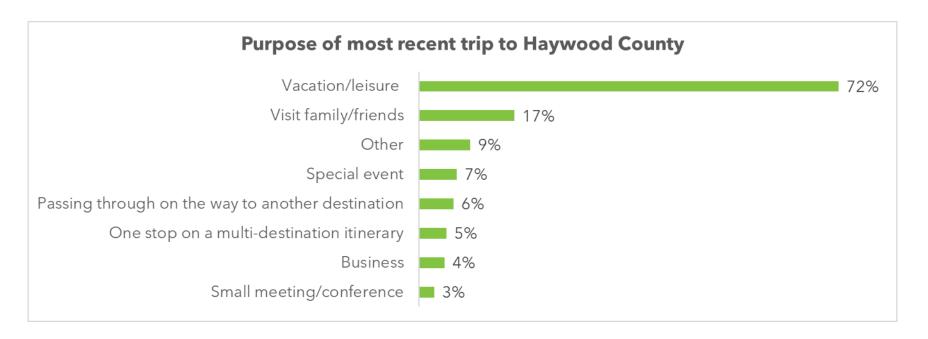
20%

come as day visitors



Purpose of Visit

- Independent leisure drives Haywood County
- Limited business and small meeting





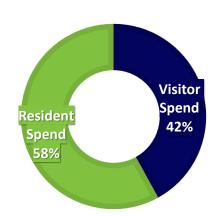
2023 In-State vs **Out-of-State Visitation**



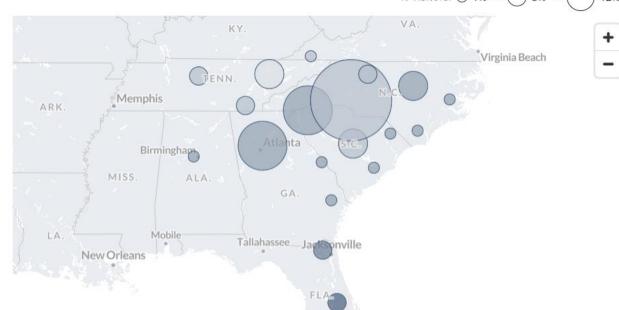
% Visitors: () 1% ... 12%

Out-of-State Visitors

78.6%



Source: Zartico



Tampa

Cape Coral

Port Saint Lucie

Miami

Marsh Harbour

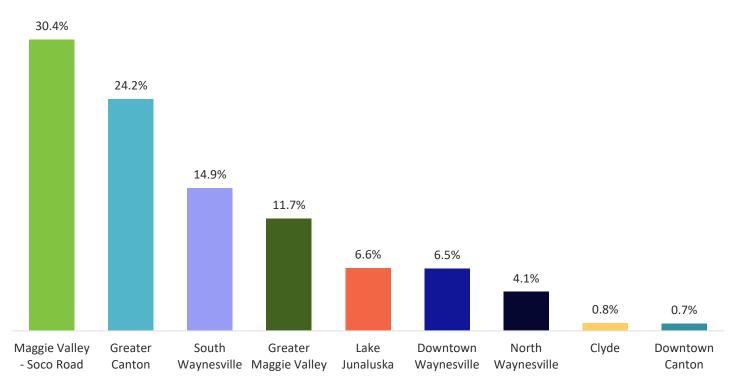
BAHAMAS

Top States:

- North Carolina
- Florida
- Georgia
- South Carolina
 - Tennessee

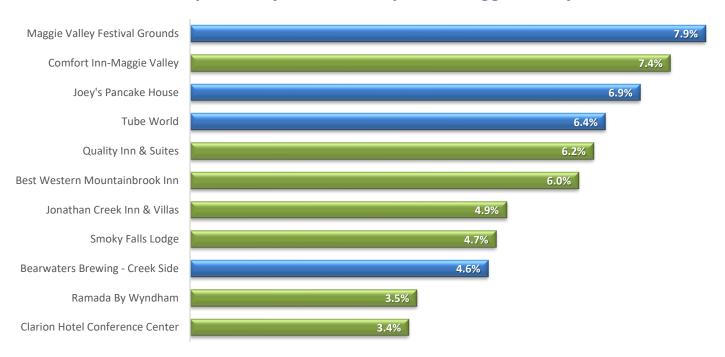


2023 Percent Visitation by Region



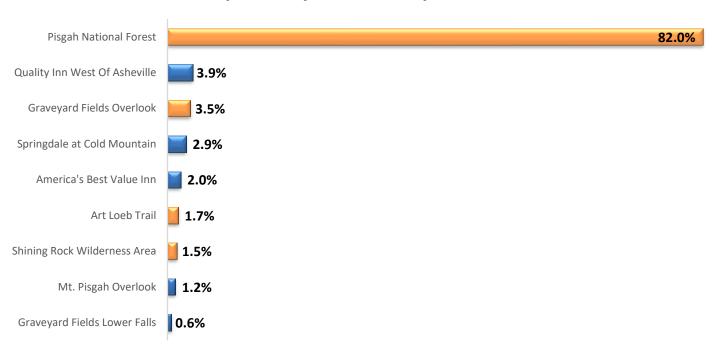


2023 Top Primary Places of Impact – Maggie Valley Soco Road



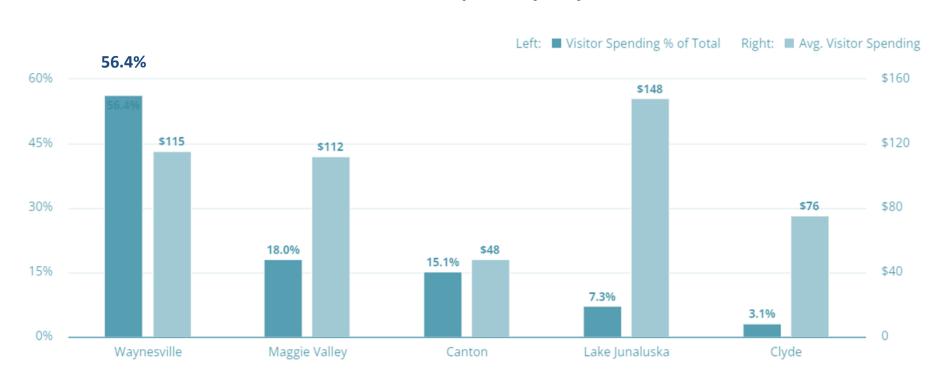


2023 Top Primary Places of Impact – Greater Canton





2023 Visitor Spend By City





STRENGTHS

> Leisure Destination:

Haywood County is renowned as a strong leisure destination, attracting visitors with its natural beauty and recreational offerings.

> Loyal Overnight Visitors:

The county enjoys a high rate of repeat visitors who not only return but also stay overnight, indicating strong visitor satisfaction.

> Above Average Length of Stay:

Visitors to Haywood County tend to stay longer than the North Carolina average, contributing to the local economy through extended visits.

> Cross-County Experiences:

Visitors engage with diverse experiences across the county–staying in Maggie Valley, playing in Canton, and shopping/dining in Waynesville–demonstrating the area's cohesive appeal.



OPPORTUNITIES

> Broadening the Meetings Market:

Targeting the small-to-mid-sized meetings sector offers an opportunity to diversify the visitor base and leverage the county's appeal as a versatile destination.

> Unified Marketing Approach:

Addressing the current fractured marketing approach by promoting the county's holistic experience can better align with visitor behaviors and preferences, unlocking greater potential for county-wide tourism.

> Engaging Younger Travelers:

Efforts should be made to connect with younger adult audiences, better ensuring the long-term appeal of Haywood County.

> Day to Overnight Transition:

Despite a strong base of overnight visitors, there remains potential to convert day visitors into overnight guests, enhancing visitor spend and experience.



- > What audiences do you think we should prioritize in the future?
- ➤ The visitor sees us as one travel destination. How can we reinforce that message and help the visitor experience even more of the entire County?

Products and Experiences

What are 3 words to describe Haywood County?



Haywood County receives high scores on most of the factors important to visitors when considering future destinations.



Q: (Current visitors) How would you rate Haywood County on the following attributes? (1=poor, 5=excellent)

Current visitors have very **positive perceptions** of Haywood County as a leisure destination.

79%

of visitors rate
Haywood County's
appeal as a destination
as a "4" or "5".



Family Friendly & Indoor Product Development is Key

Visitors do consider Haywood County Family Friendly. However, internal stakeholders have noted the lack of inclement weather products and experiences can be a clear negative factor.





Potential visitors are interested in **passive outdoor activities** along with festivals, culinary, breweries, and shopping on future visits.



56% Scenic Drives



42%Breweries, Distilleries & Wineries



52% Sight Seeing



42% Shopping



52% Festivals



38% Wildlife Watching



50% Dining/Culinary



37% Arts & Crafts

Potential visitors
under 55 rank
water activities
including kayaking/
canoeing and river
tubing 7 to 9 points
higher than our
current over 55
visitors.



STRENGTHS

> Diverse Offerings:

Haywood County boasts a rich variety of products and experiences from scenic drives on the Blue Ridge Parkway, hiking in the Great Smoky Mountains to local dining options, underscoring its appeal as a diverse leisure destination.

> Unique Wildlife Experiences:

Elk viewing and wildlife watching stand out as unique experiences that draw visitors, highlighting the county's exceptional natural heritage.

> Family-Friendly Destination:

Visitor feedback indicates that Haywood County is a strong family-friendly destination - ranking third on our overall list of attributes.

➤ Exceptional Visitor Satisfaction: Haywood County stands out for its high visitor satisfaction, earning high marks in key areas that influence destination choice. This includes offering great value and affordability, providing a serene escape, fostering a welcoming and friendly atmosphere, and showcasing breathtaking scenic drives. These strengths collectively highlight Haywood County's appeal as a top choice for travelers.



OPPORTUNITIES

> Immersive Scenic Activities:

Exploring opportunities to make scenic experiences more engaging through guided tours, improved signage, and other unique activities that highlight the beauty of the Blue Ridge Parkway, the Great Smoky Mountains and its surroundings. These initiatives could help visitors connect more deeply with the natural environment and learn about the area's history and biodiversity.

> Elevating Sustainability Practices:

With a current medium rating in sustainability and a strong focus on nature and mountain experiences, Haywood County is uniquely positioned to lead in eco-friendly tourism practices. There's a pressing responsibility to maintain and enhance sustainability to protect its natural assets.

➤ Indoor and Family Activities:

Addressing the gap in indoor activities, particularly for families and during inclement weather, is crucial. Expanding indoor attractions could provide year-round entertainment options, making the destination more resilient to seasonal weather changes.

> Water Activities, Arts, Festivals, and Culinary Expansion:

Younger visitors and potential visitors express interest in passive outdoor activities, water-specific activities, festivals, culinary experiences, breweries, and shopping. Developing these areas can attract a broader demographic.



- ➤ How can we create immersive activities that not only enrich the visitor experience but also enhance the quality of life for Haywood County residents?
- ➤ What indoor or all-weather activities could make Haywood County a more vibrant place to live and visit throughout the year?
- Considering the interest in water activities, arts, festivals, and culinary experiences, what opportunities do you see to enrich the cultural tapestry of Haywood County for both the community and visitors?

Sustainability Factors



Key Findings

Land Use

- Outdoor recreation infrastructure and improvement of connectivity of towns and trails benefits residents and visitors
- Monitoring the progress of urban sprawl development.
- Aging infrastructure and other placemaking enhancements will require future investments.

Environmental Resources

- Flooding poses one of the greatest risks to the entire destination.
- Water quality downstream of the mill remains a concern.
- Managing wildlife interactions at STRs (e.g. waste management) to avoid risks to human and wildlife safety.
- Public lands in Haywood County are popular but don't seem to be exceeding capacity so it is important to keep it that way. Working with outdoor recreation and land manager partners is a must.

Sustainable destination management priorities

 The TDA's is conducting a priority assessment using the Mountain IDEAL international standard for sustainable destination management.

Next Steps

Next Steps

- ➤ Community meeting this evening
- > Take feedback and refine critical issue thinking
- ➤ Move into the Destination Master Planning stage
- > Develop a mix of plan Goals/Pillars, Objectives, Strategies and Tactics
- > Return in May to review draft recommendations
- ➤ Deliver Destination Master Plan in August

