



# Elizabeth City - Pasquotank County Tourism Development Authority Board Meeting

EXECUTIVE DIRECTOR'S REPORT | JUNE 25, 2020



Relaxing.  
Revitalizing.  
Rejuvenating.



Our quaint, coastal town's southern charm and hospitality will make you feel right at home. Enjoy the picturesque waterfront, **relax, revitalize and rejuvenate.**

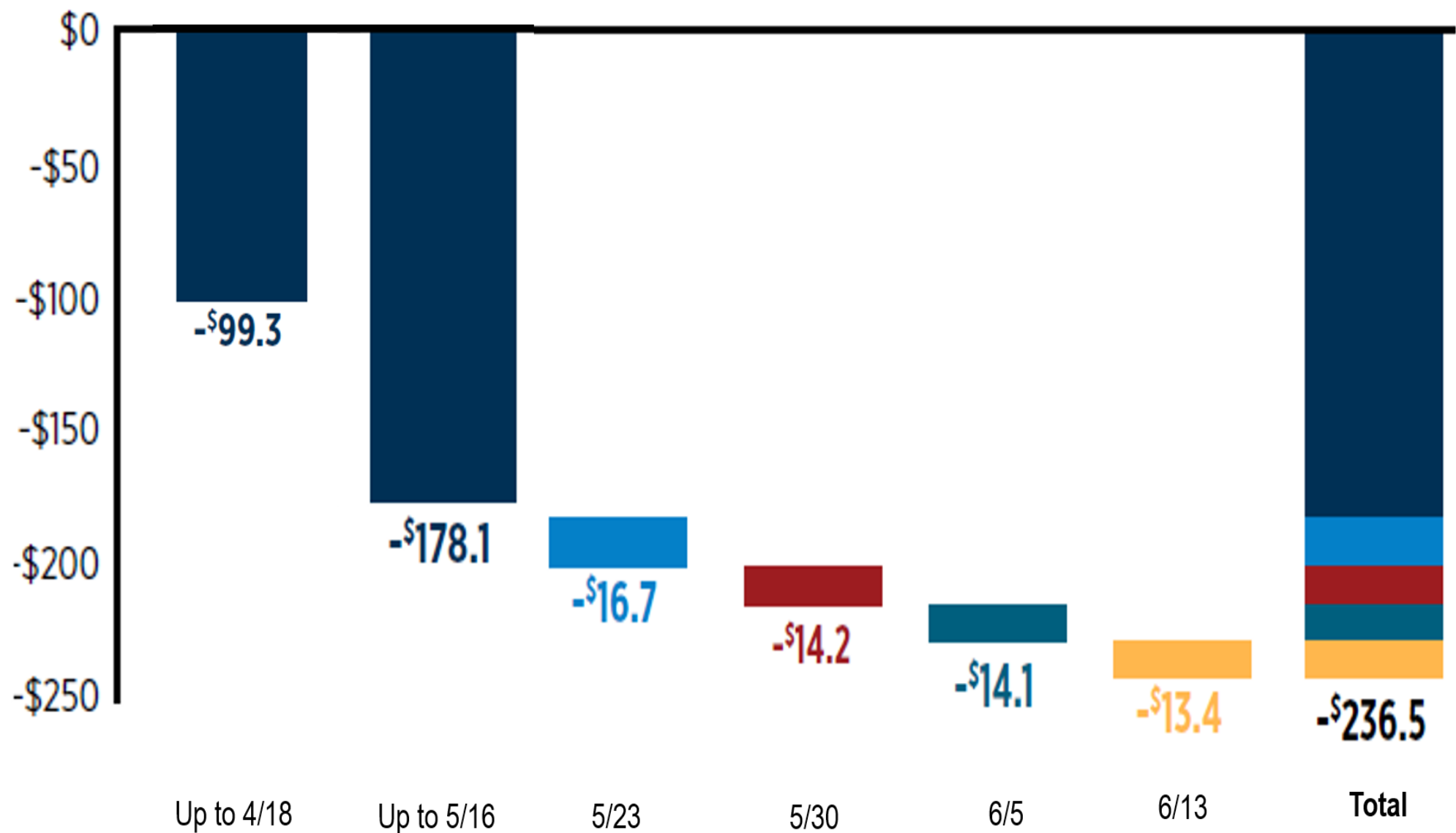
  
VISIT  
**Elizabeth City**  
NORTH CAROLINA

[VisitElizabethCity.com](http://VisitElizabethCity.com)



# *COVID-19 & the State of the Travel Industry*

# Weekly Travel Spending Losses through June 13th

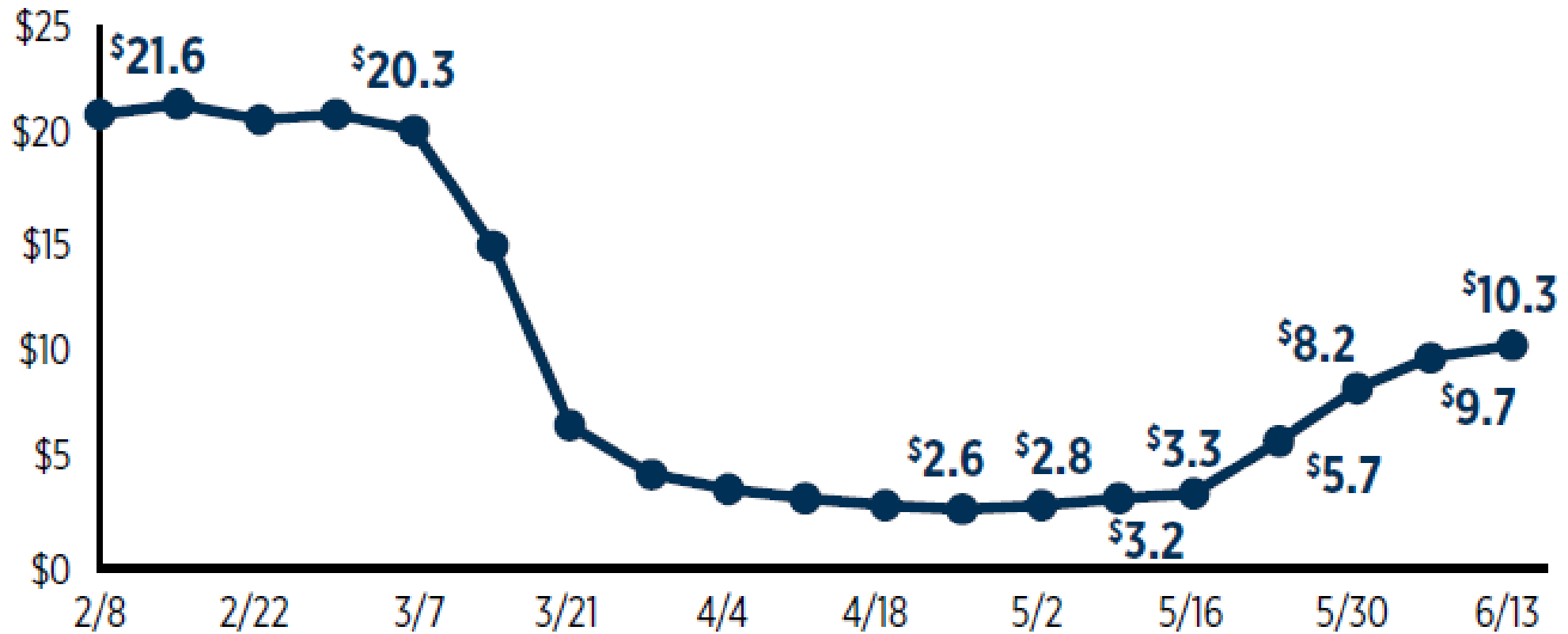


Since the beginning of March, the COVID-19 pandemic has resulted in over **\$236+ billion** in losses for the **U.S. travel economy**.

*“Weekly Coronavirus Impact on Travel Expenditures in the US”. US Travel Association. June 18, 2020.*

## National Weekly Travel Spending

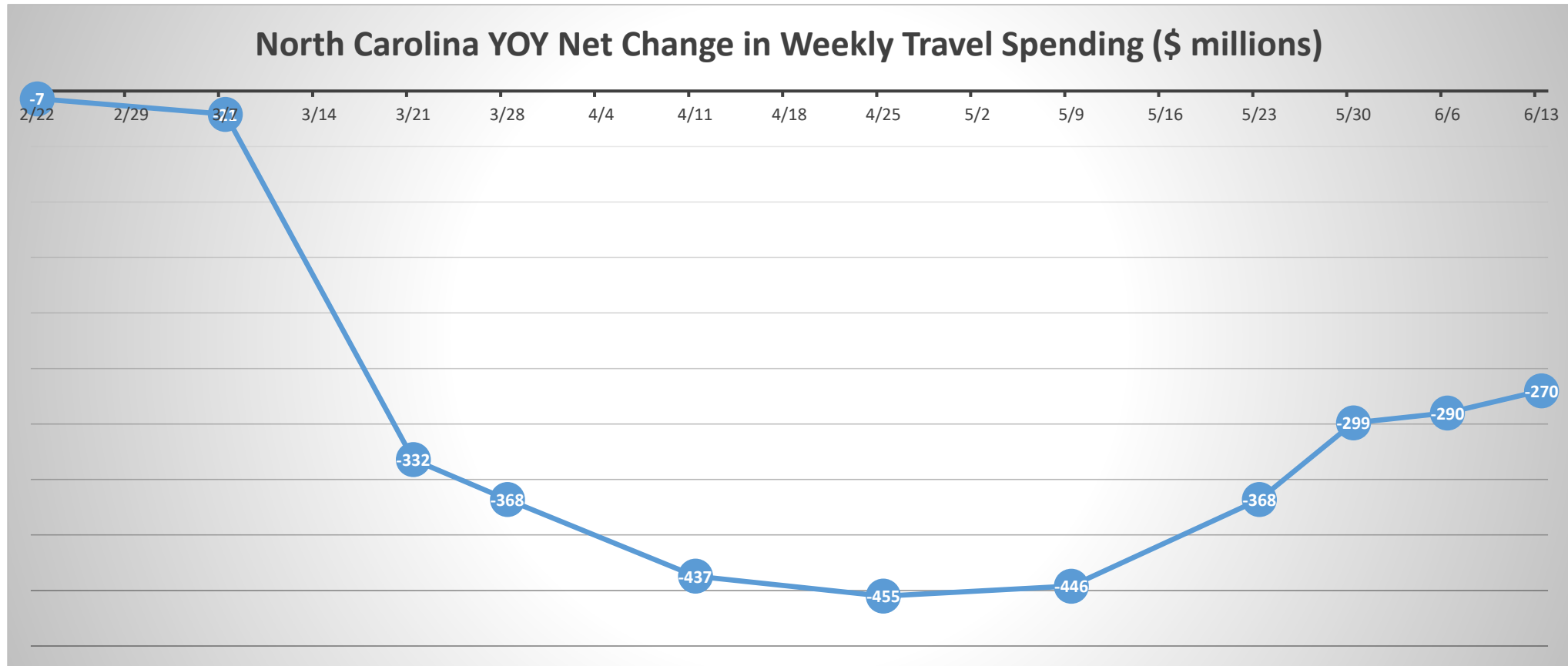
(\$ billions)



Source: Tourism Economics

Week Ending North Carolina	Year over Year % Change in Weekly Travel Spending										
	2/22	3/7	3/21	3/28	4/11	4/25	5/9	5/23	5/30	6/6	6/13
	-1%	-4%	-63%	-75%	-83%	-86%	-84%	-61%	-57%	-52%	-49%

	Year over Year Net Change in Weekly Travel Spending (\$ millions)										
Week Ending	2/22	3/7	3/21	3/28	4/11	4/25	5/9	5/23	5/30	6/6	6/13
North Carolina	-7	-21	-332	-368	-437	-455	-446	-368	-299	-290	-270

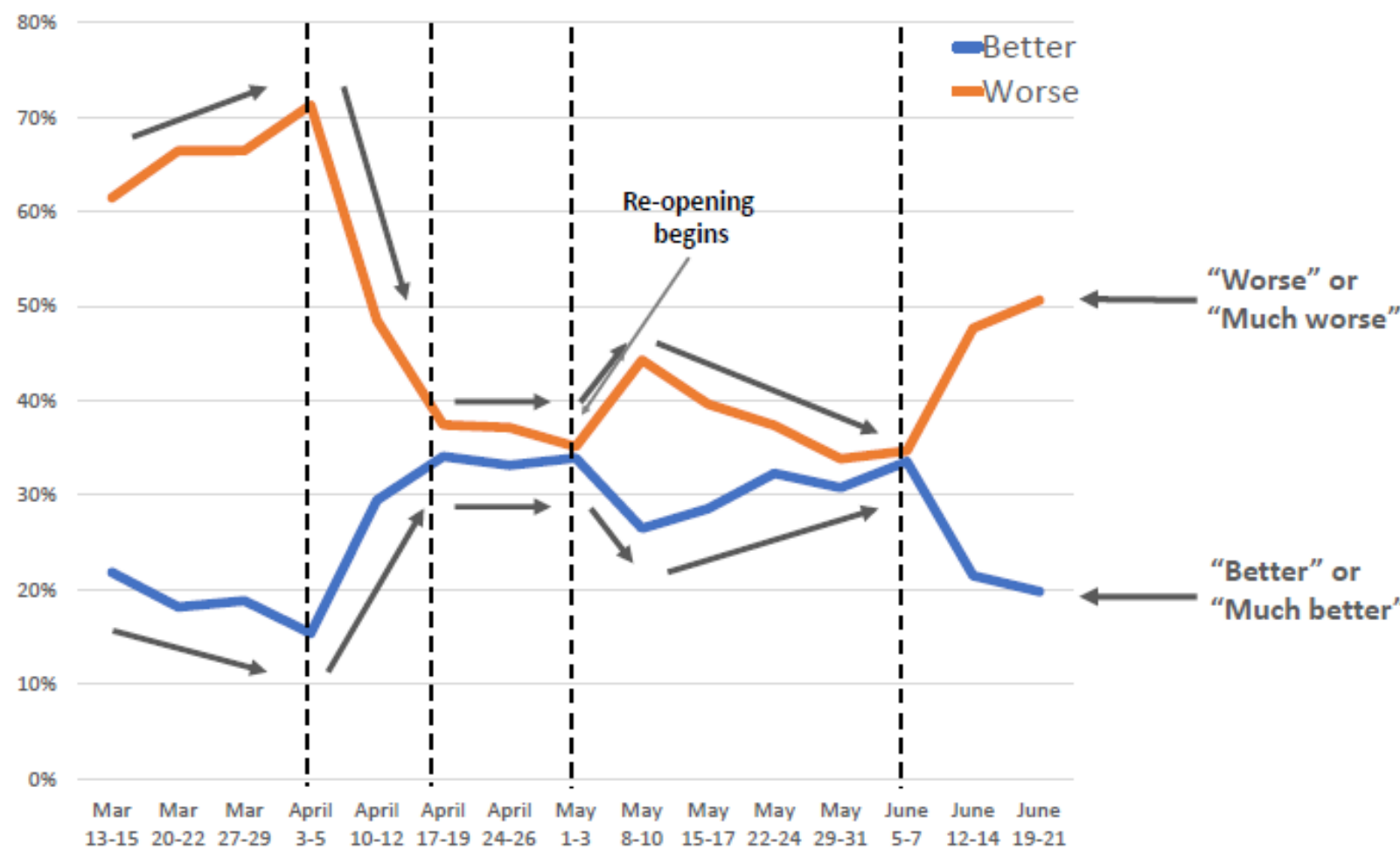


# Expectations for the Coronavirus Outbreak

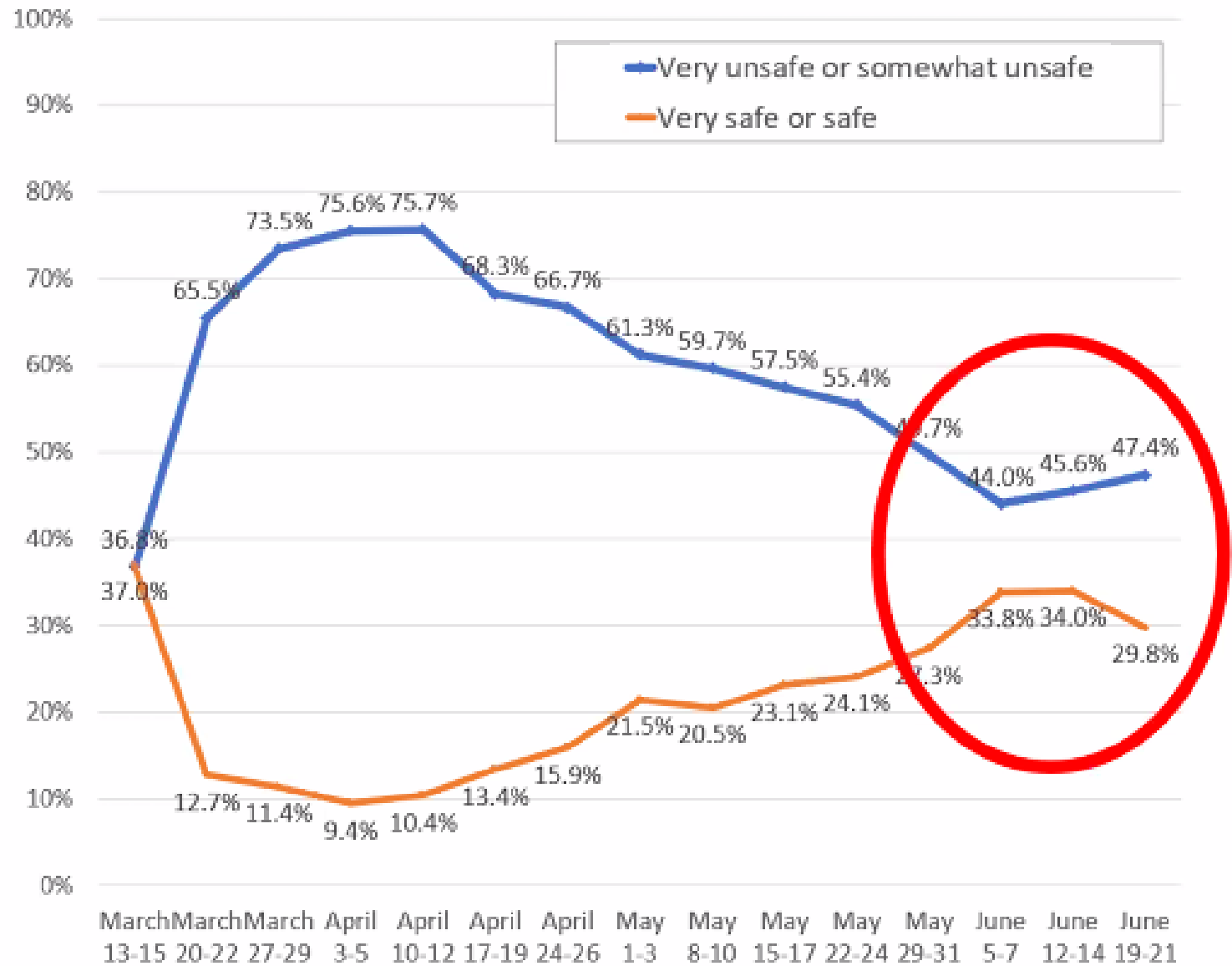
**Question:** In the NEXT MONTH, how (if at all) do you expect the severity of the coronavirus situation in the United States to change? (Select one)

In the next month the coronavirus situation will

(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214 and 1,205 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14 and 19-21 2020)



# Perceived Safety of Dining in Restaurants



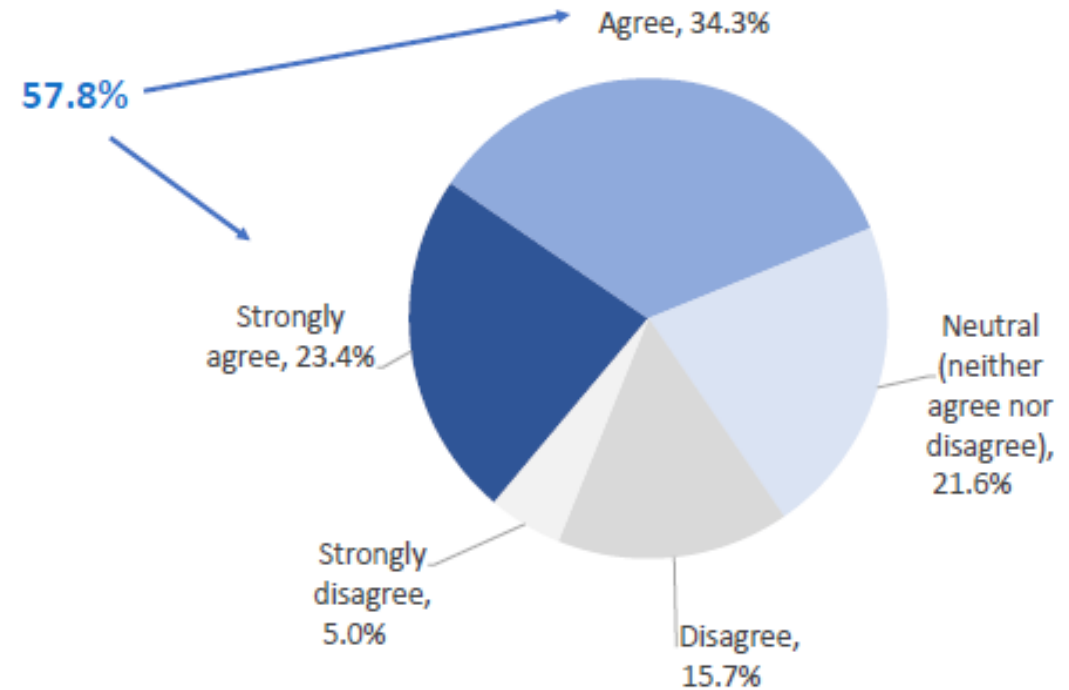
“Coronavirus Travel Sentiment Index”. Destination Analysts. June 22, 2020.

# Community Social Distancing

How much do you agree with the following statement?

**Statement:** In my community, too many people are NOT maintaining appropriate social distancing when in public.

*(Base: All respondents, 1,205 completed surveys. Data collected June 19-21, 2020)*

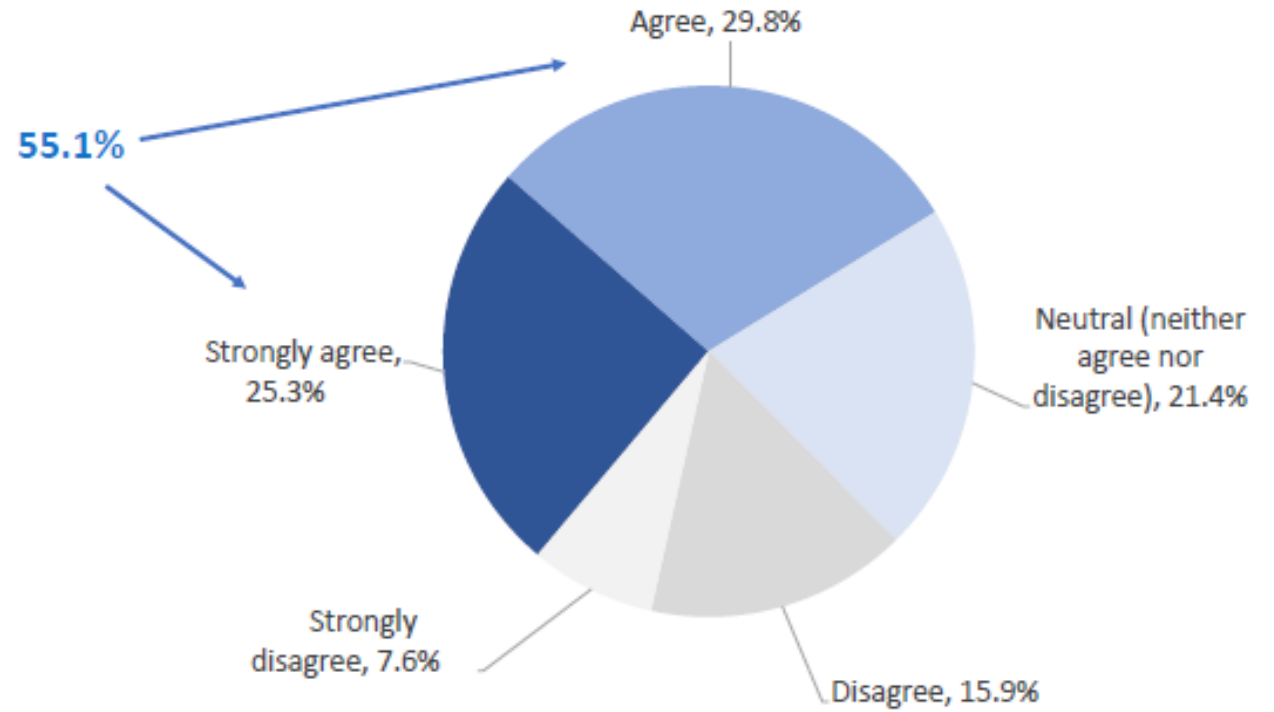


# Community Face Mask Wearing

How much do you agree with the following statement?

**Statement:** In my community, too many people are not wearing face masks in public.

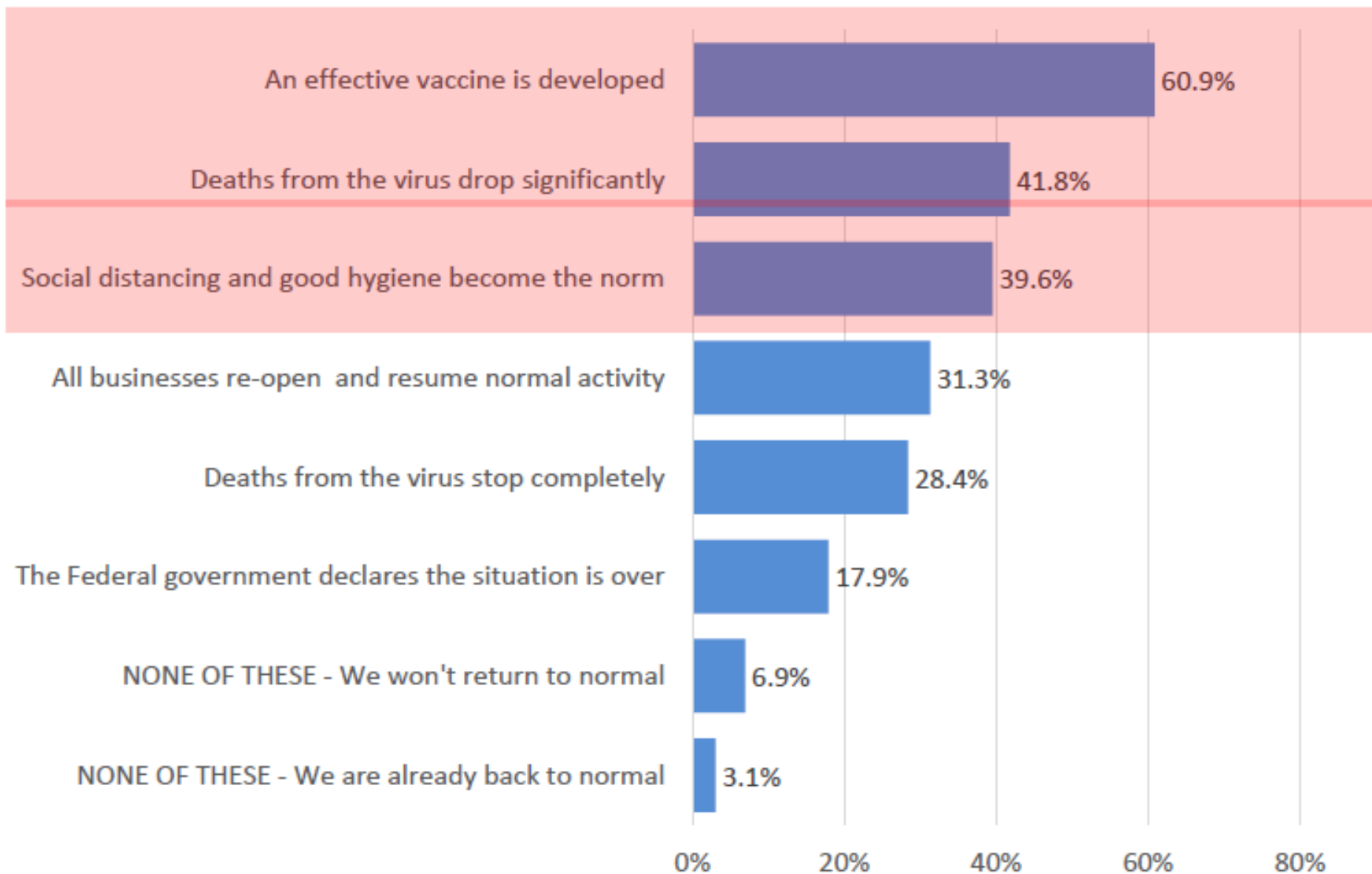
*(Base: All respondents, 1,205 completed surveys. Data collected June 19-21, 2020)*



# A Return to Normalcy. What Does That Mean?

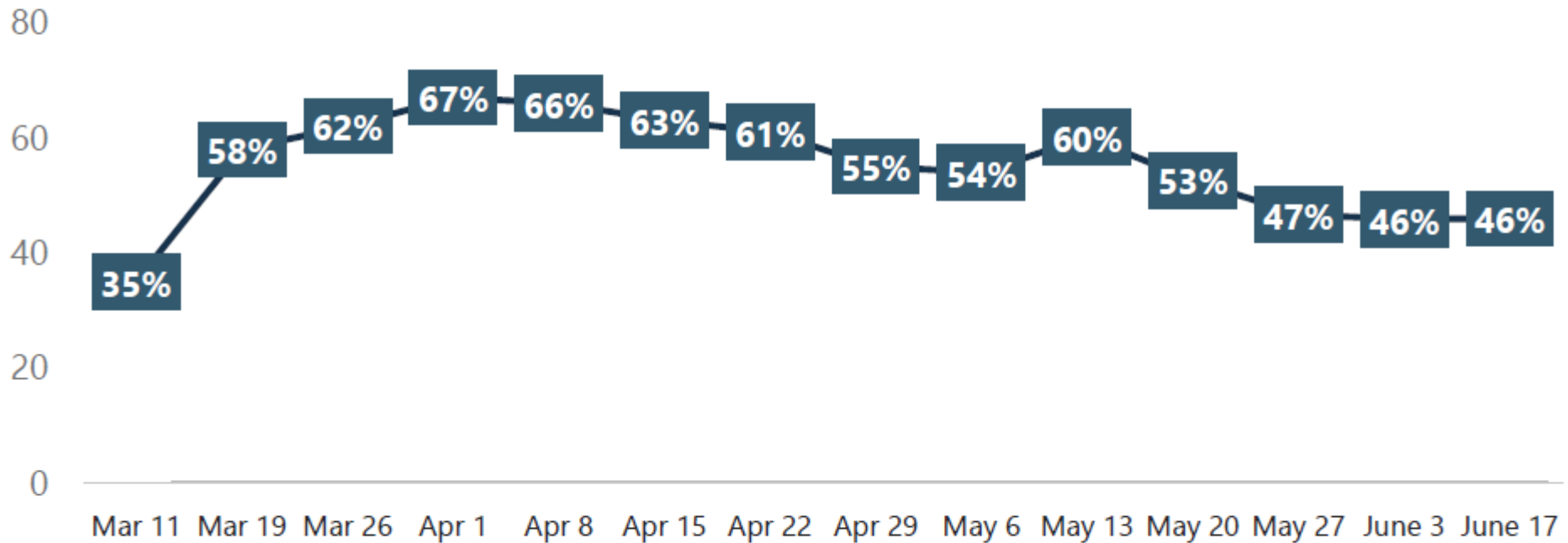
**Question:** In your mind, which of the following will need to happen before you feel things have returned back to a normalcy you are comfortable with? (Select all that apply)

*(Base: All respondents, 1,205 completed surveys. Data collected June 19-21, 2020)*



## IMPACT ON TRAVEL PLANS

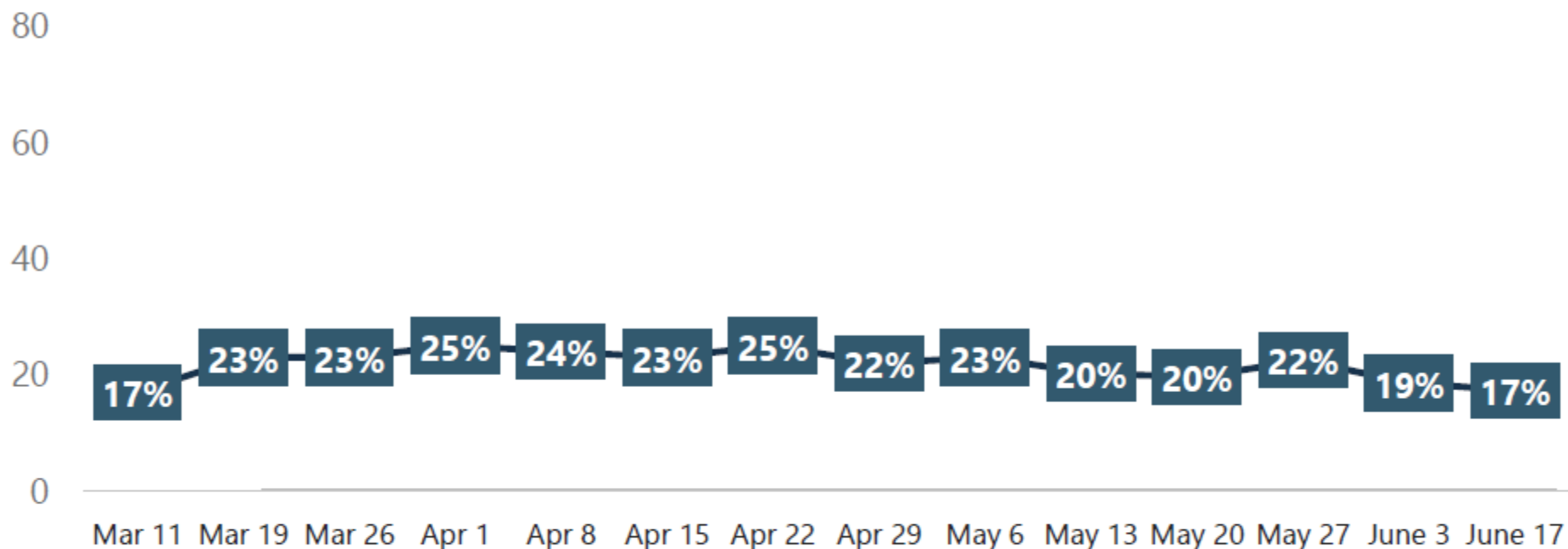
### Indicated that Coronavirus Would Greatly Impact their Decision to Travel in the Next Six Months



*"Travel Sentiment Study". Longwoods International. June 23, 2020.*

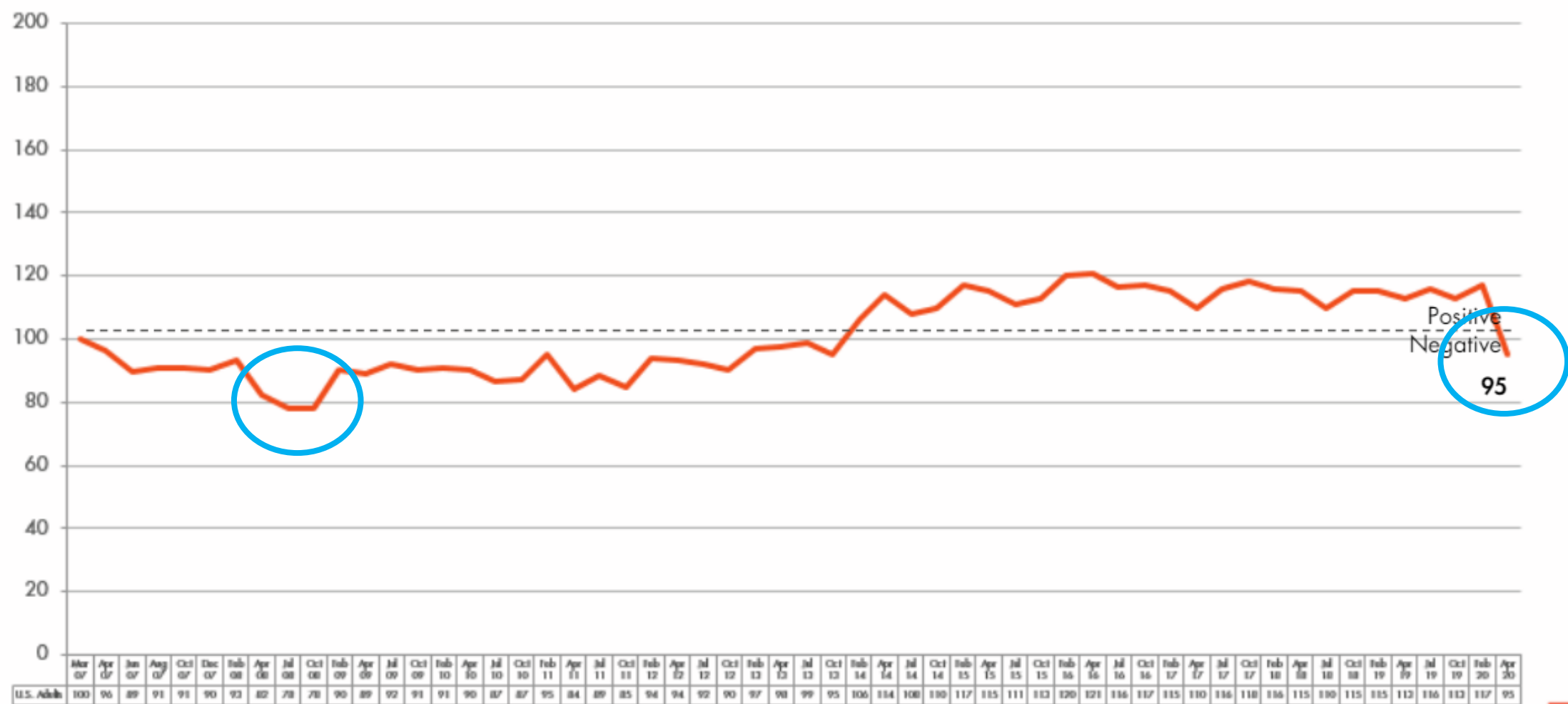
## IMPACT ON TRAVEL PLANS

### Indicated that the Economy Would Greatly Impact their Decision to Travel in the Next Six Months



*"Travel Sentiment Study". Longwoods International. June 23, 2020.*

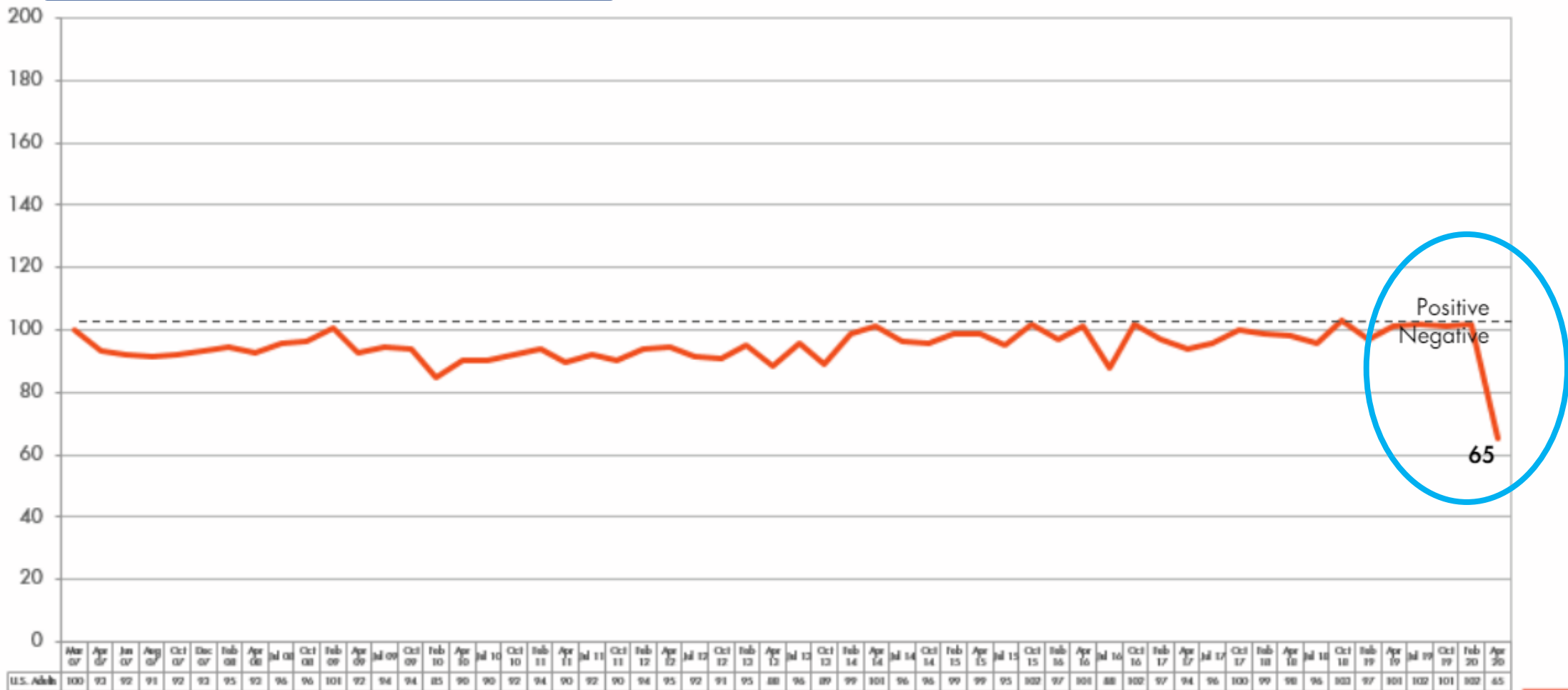
# TRAVELER SENTIMENT INDEX™



Compiled from Q26– Q31. Base: Total Respondents  
Source: MMGY Global, travelhorizons, Wave II 2020

# TRAVELER SENTIMENT INDEX™

PERCEIVED SAFETY OF TRAVEL



Q31. How would you describe the safety of travel compared to a year ago?  
Base: Total Respondents  
Source: MMGY Global, travelhorizons, Wave II 2020



# DRIVE MARKETS DURING SHORT- TERM RECOVERY

A hiker wearing a grey cap, a dark long-sleeved shirt, dark pants, and a large red and white backpack stands on a rocky mountain peak. The hiker is facing away from the camera, looking out over a vast landscape. The landscape features a large body of water, possibly a fjord, surrounded by rugged mountains and islands. The sky is overcast and hazy. The text is overlaid on the left side of the image.

**SAFETY WILL DICTATE  
IF PEOPLE TRAVEL  
EXPERIENCE STILL DETERMINES  
WHERE THEY GO**

# OUTDOOR EXPERIENCES AND SOCIAL DISTANCING

Source: MMGY Global, Travel Safety Barometer, June 9, 2020



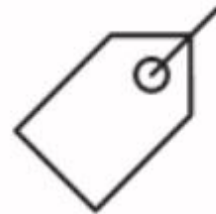
# Traveler needs span across three themes



**Hygiene, Cleanliness  
& Safety**



**Booking & Travel  
Flexibility**



**Value & Deals**

### Daily Travel Index

- 27.6%

June 22, 2020, Monday

### Day of Week Change

+ 5.4%

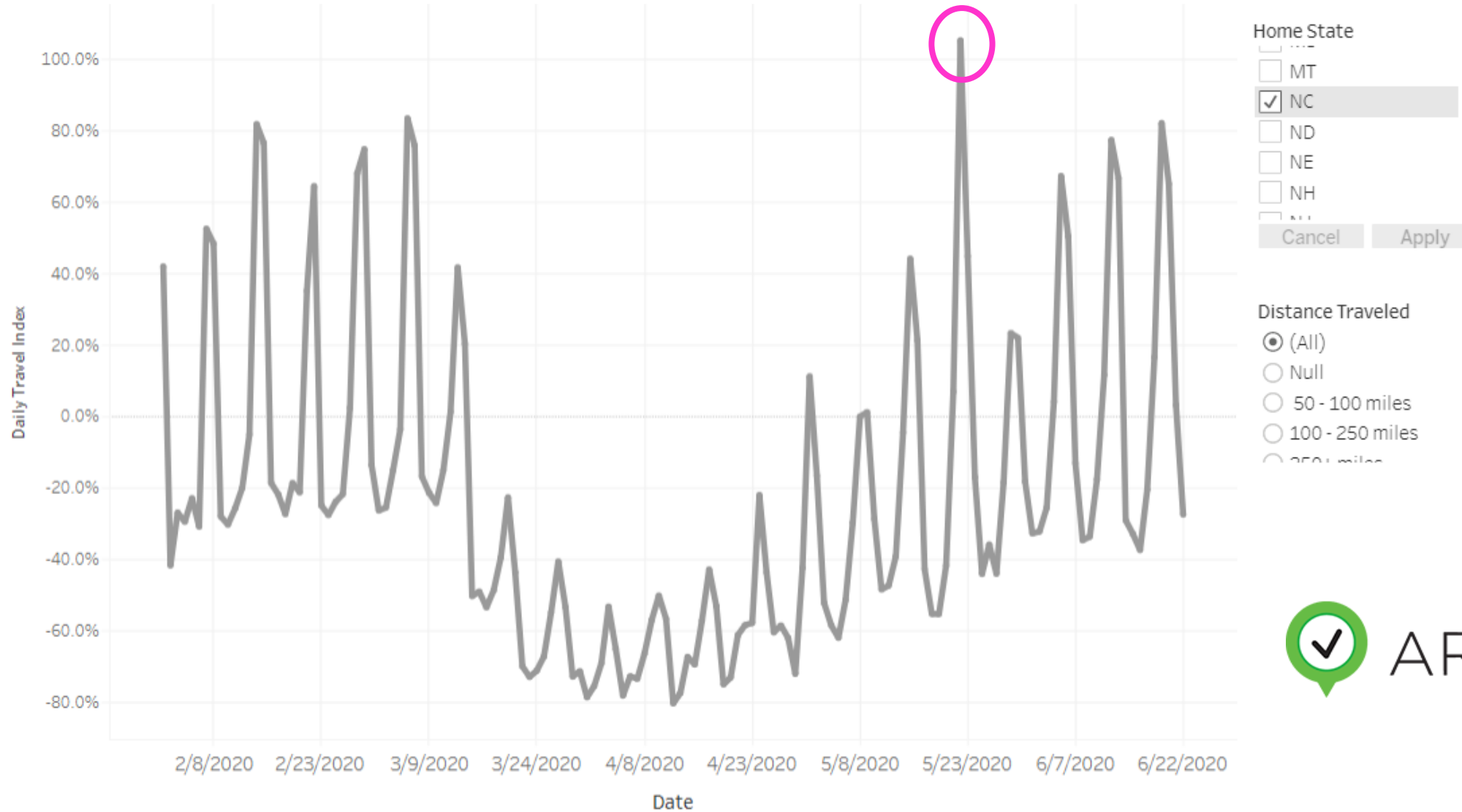
Monday vs Prior Monday

### Week over Week Change

+ 5.6%

Last 7 Days vs Prior 7 Days

## Memorial Weekend Travel in NC





## 2020 Smith Travel Research Report Measures

	EC Region <i>Actuals</i>	EC Region YOY <i>Comparison</i>	Golds- boro <i>Actuals</i>	Golds- boro YOY <i>Comparison</i>	Beaufort County <i>Actuals</i>	Beaufort County YOY <i>Comparison</i>	New Bern <i>Actuals</i>	New Bern YOY <i>Comparison</i>	Middle OBX <i>Actuals</i>	Middle OBX YOY <i>Comparison</i>	Suffolk, VA <i>Actuals</i>	Suffolk, VA YOY <i>Comparison</i>	NC – Entire State YOY <i>Comparison</i>	NC – Northeast Region YOY <i>Comparison</i>
<i>Month To Date – April 2020</i>														
Occupancy	29.2%	-54.8% from April '19	32.4%	-53.4%	21.1%	-56.8%	34.5%	-57.2%	0%		28.0%	-58.0%	-61.6%	-54.8%
ADR	\$76.15	-16.2%	\$75.93	-15.6%	\$66.53	-15.6%	\$87.70	-21.4%	\$0		\$73.63	-24.2%	-38.2%	-29.3%
RevPAR	\$22.21	-62.0%	\$24.60	-60.7%	\$14.06	-63.5%	\$30.25	-66.3%	\$0		\$20.64	-68.2%	-76.2%	-68.8%
<i>Year to Date – April, 2020</i>														
Occupancy	41.9%	-28.8%	45.4%	-28.9%	30.7%	-36.8%	58.1%	-25.8%			41.3%	-28.3%	-29.1%	-26.6%
ADR	\$80.22	-4.7%	\$82.97	3.5%	\$73.43	-5.1%	\$98.93	-7.8%			\$81.22	-7.7%	-9.6%	-9.7%
RevPAR	\$33.59	-32.1%	\$37.64	-31.3%	\$22.56	-40.0%	\$57.44	-31.6%			\$33.51	-33.8%	-35.8%	-33.7%

EC Region includes: 7 out of 7 properties; total rooms: 541/541

Goldsboro includes: 10 out of 15 properties; total rooms: 915/1127

Beaufort County includes: 6 out of 9 properties; total rooms: 413/548

Northeast Region includes: Beaufort, Bertie, Camden, Chowan, Currituck, Dare, Edgecombe, Gates, Halifax, Hertford, Hyde, Martin, Nash, Northampton, Pasquotank, Perquimans, Pitt, Tyrrell, Washington, Wilson

New Bern includes: 7 out of 8 properties; total rooms: 636/701

Middle OBX includes: 5 out of 17 properties; total rooms: 611/1095; (Kitty Hawk, Duck, Nags Head)

Suffolk, VA includes: 9/12 properties; total rooms: 835/990

ADR= Average Daily Rate

RevPAR= Revenue Per Available Room



## 2020 Smith Travel Research Report Measures

	EC Region <i>Actuals</i>	EC Region YOY <i>Comparison</i>	Golds- boro <i>Actuals</i>	Golds- boro YOY <i>Comparison</i>	Beaufort County <i>Actuals</i>	Beaufort County YOY <i>Comparison</i>	New Bern <i>Actuals</i>	New Bern YOY <i>Comparison</i>	Middle OBX <i>Actuals</i>	Middle OBX YOY <i>Comparison</i>	Suffolk, VA <i>Actuals</i>	Suffolk, VA YOY <i>Comparison</i>	NC – Entire State YOY <i>Comparison</i>	NC – Northeast Region YOY <i>Comparison</i>
<i>Month To Date – May 2020</i>														
Occupancy	41.6%	-35.8% from May '19	39.7%	-43.2%	26.1%	-55.0%	47.0%	-44.3%	29.0%	-61.0%	41.1%	-33.8%		
ADR	\$78.67	-15.7%	\$76.43	-15.1%	\$66.38	-19.5%	\$87.89	-25.0%	\$125.42	-29.9%	\$74.96	-21.2%		
RevPAR	\$32.73	-45.9%	\$30.36	-51.7%	\$17.35	-63.8%	\$41.34	-58.2%	\$36.34	-72.7%	\$30.82	-47.8%		
<i>Year to Date – May, 2020</i>														
Occupancy	41.8%	-30.3%	44.8%	-31.1%	29.8%	-41.1%	55.8%	-29.8%	28.0%	-47.5%	41.2%	-29.5%		
ADR	\$79.91	-7.3%	\$81.49	-6.2%	\$72.15	-8.2%	\$97.02	-11.4%	\$99.96	-27.0%	\$79.94	-10.7%		
RevPAR	\$33.42	-35.4%	\$36.49	-35.4%	\$21.50	-45.9%	\$54.13	-37.8%	\$28.02	-61.7%	\$32.96	-37.0%		

EC Region includes: 7 out of 7 properties; total rooms: 541/541

Goldsboro includes: 10 out of 15 properties; total rooms: 915/1127

Beaufort County includes: 6 out of 9 properties; total rooms: 413/548

Northeast Region includes: Beaufort, Bertie, Camden, Chowan, Currituck, Dare, Edgecombe, Gates, Halifax, Hertford, Hyde, Martin, Nash, Northampton, Pasquotank, Perquimans, Pitt, Tyrrell, Washington, Wilson

New Bern includes: 7 out of 8 properties; total rooms: 636/701

Middle OBX includes: 5 out of 17 properties; total rooms: 611/1095; (Kitty Hawk, Duck, Nags Head)

Suffolk, VA includes: 9/12 properties; total rooms: 835/990

ADR= Average Daily Rate

RevPAR= Revenue Per Available Room

★ Count ON ME NC ★



**VISIT**  
*Elizabeth City*  
**NORTH CAROLINA**

Visit EC Safety &  
Reopening Plan

A MUTUAL COMMITMENT TO KEEP EVERYONE HEALTHY & SAFE

## Visit Elizabeth City Back-To-The-Office Safety Plan

### Main concerns:

1. Interactions with visitors and staff
2. Sharing confined, indoor workspaces
3. Sharing desks and office equipment

### Supplies needed to have on hand:

- Masks: needed at front desk and in each office
- Disposable gloves: needed at front desk for interactions with visitors
- Sanitizing wipes or equivalent cleaner: needed for shared surfaces, especially at front desk
- Hand sanitizer: needed at front desk and in each office

### Plan Highlights

- VEC Onsite Staffing will rotate
- Phones will not be shared.
- Desks, workspaces, and computers will only be used by one person—no overlapping.
- Shared assets / workspaces will be sanitized / wiped down before and after every use
- Masks will be worn when in public areas onsite or while interacting with people
- Brochures for visitors will be individually selected and given to visitors by staff
- Employees who are sick may not come to work onsite
- Employees who have been ill with fever must be fever free for 72 hours before returning to work
- If employees onsite begin to feel sick, they are required to go home.
- If the employee develops COVID-19-like symptoms, they must contact their doctor for testing and then self-isolate until results are back
- Those that have been in contact with that employee should also self-isolate and/or get tested as appropriate
- The self-isolation period is 14 days



# *Old Business*



*New Business*



## 2020-2021 Marketing Plan Highlights

---

## Strengths

Water

Walkable Downtown

Proximity to the Beach

Small Town Charm

## Challenges

Resources

Finances

Destination Assets

Partner Communication

## Opportunities

Digital Marketing

Social Media

Frontline Staff &  
Ambassadors

Capturing a New Kind  
of Traveler

# Visitor Profile Research

## Insight 1

The top 3 words past visitors use to describe Elizabeth City are small, quaint, and friendly.



## Insight 2

The most important attributes people look for in a vacation destination:

- Quality and variety of lodging opportunities
- Quality and variety of dining options
- Variety of activities

However, of past guests surveyed, only 59% felt familiar with Elizabeth City.

## Insight 3

The number one reason past visitors come here is to see **friends** and **family**.

## Insight 4

Visitors are most interested in opportunities for new **dining** options and **activities on the waterfront**.

## Insight 5

Most of Elizabeth City's visitors come from these target regions:

### ***Top States***

1. North Carolina
2. Virginia

### ***Specific Designated Market Areas (DMAs)***

1. Norfolk-Portsmouth-Newport News
2. Raleigh-Durham
3. Charlottesville, VA
4. Greenville-New Bern-Washington
5. Greensboro-High Point-Winston Salem
6. Roanoke-Lynchburg, VA



# U.S. Travel Trends

## Trend 1

Consumers want to visit small, rural destinations rather than cities.

## Trend 2

Top 3 places travelers want to visit:

1. Park    2. Restaurant/Bar    3. Beach

## Trend 3

Travelers are becoming more eager to travel – but by car and closer to home.

## Trend 4

The first trip travelers want to take is to visit friends and family.

## Trend 5

People will not travel again until they feel it is safe, and they will continue to avoid crowds when they do.



# Marketing Goals



## Goal 1

Increase demand for lodging, attraction visits, retail sales, restaurant receipts, and more that expand the economic impact of the local tourism industry.

## Goal 2

Expand partnerships with local businesses and educate partners about the value of using the DMO.



## Goal 3

Build on the relationship with the region's tourism organizations.



## Goal 4

Create a wedding campaign that promotes local businesses and increases exposure for Elizabeth City as a destination.



## Goal 5

Launch a Rose Buddies ambassador program leveraging community members.

# Strategies

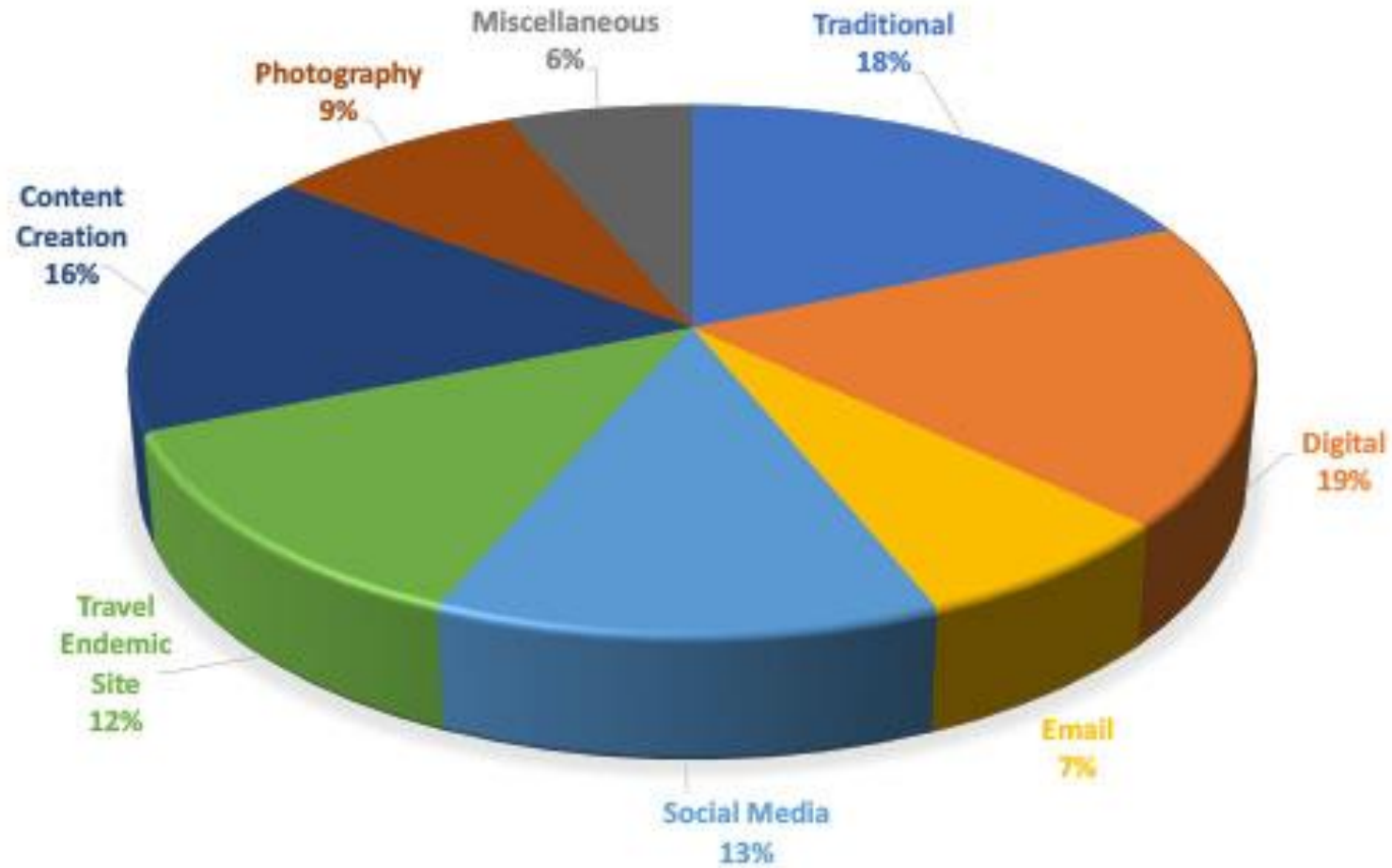
Exposure on multiple channels will be key in creating awareness, driving interest, and attracting visitors from local drive markets.

- Media Relations
- Social Media
- Email
- Traditional Media
- Digital Media
- Content Creation
- Travel Endemic Sites
- Photography



# Budget

Our total marketing budget for FY 2020-2021 is \$175,000.



# Key Performance Indicators

## Media / Public Relations

### GOALS

Write and issue at least 12 press releases

Grow distribution list by 15%

Host 3 journalists or influencers in the destination

Measurement



#### Awareness

Total number of press releases sent (releases x recipients)



#### Engagement

Open emails/ requests for additional information



#### Action

Content published based on a release

## Content Development

### GOAL

Develop 12 new and update 12 existing blogs or videos

Measurement



#### Awareness

Total views of content pages/ blogs



#### Engagement

Time on site (within this section)



#### Action

Clicks from a content piece to additional information

## Social Media

### GOALS

Increase engagement rates by 10%

Increase audiences on all channels by 5%

Measurement



#### Awareness

Total impressions



#### Engagement

Likes and comments



#### Action

Website visits



#### Advocacy

Mentions

## Email

### GOALS

Grow consumer email database by 10%

Grow partner email database by 20%

Measurement



#### Awareness

Number of campaigns delivered



#### Engagement

Number of opened emails



#### Action

Number of clicks and forwards

# Lodging Industry Metrics

We can review monthly and annual performance of our lodging industry by measuring and tracking

**Occupancy, ADR, and RevPar**



## Economic Impact of Tourism

These numbers provide a rear-view look at visitor spending, industry jobs, state and local tax receipts from travel to Pasquotank County.

## Occupancy Tax Collections

The actual amount of monthly revenues from the 6% occupancy tax.



## 2020-2021 Marketing Plan

**Staff and Marketing Committee Recommendation:**  
Adopt the FY 2020-2021 Marketing Plan

# Marketing Grant Program

## Staff and Visitor Experience Committee Recommendation

Approve the Matching  
Marketing Grant Program and  
documents for FY2020-2021

**Program is very similar to the program adopted in December 2019. Modifications for 2020-2021 include:**

- To address impacts of COVID-19, the committee recommends loosening of requirements for projects to be new or significantly expanded, plus allowing a portion of the advertising dollars to be spent locally.
- Addition of a budget template to help applicants provide that information
- Connect the marketing requirements of the grant to our new destination marketing plan
- Two grant submission and approval cycles this fiscal year, applications due August 12 and January 13

**The proposed new Personnel Policy has been a lengthy process including a review of other TDA policies, review by 3 current board members and our attorney:**

- Our Personnel Policy was last reviewed and adopted in 2007 and contained many outdated elements
- From start to finish, Attorney John Leidy was involved in the process to help review the old policy, add required new elements and conduct a thorough final review
- New sections include
  - Whistleblower Policy
  - Sexual and Harassment Policy
  - Technology Plan

---

### **Staff and Volunteer Board Member's Recommendation**

Approve and adopt the updated Personnel Policy Manual, effective July 1, 2020

# Personnel Policy



# City-County Restricted Funds Guidelines

## **Staff and Visitor Experience Committee Recommendation**

Approve the updated  
Guidelines and Application for  
the City & County

### **Updated Guidelines for the City & County for requesting their restricted tourism expenditure funds highlights**

- Include requirements as dictated by state legislation
- Remove outdated elements such as the requirement for a master plan, oversight by the TDA and a 50% match
- Simplify and clarify the TDA's vision for possible tourism expenditure projects as well as non-allowed expenses
- Explain the process for the City and County to allow non-profits to leverage these funds



*Special Recognition*





**Thank you!**