



Elizabeth City - Pasquotank County Tourism Development Authority Board Meeting

EXECUTIVE DIRECTOR'S REPORT | SEPTEMBER 26, 2019



Executive Director's Meetings and Activities August 18, 2019 – September 20, 2019

- August 19 – Met with Gwen
- August 19 – Met with Gene Tick
- August 20 – Attended Chamber board meeting
- August 21 – Attended ECPCEDC board meeting
- August 21 – Attended ECPCEDC ribbon cutting and announcement
- August 22 – Attended TDA board meeting
- August 27 – Hosted Wayfinding meeting
- August 28 – Hosted Collaborative Marketing meeting
- August 28 – Met with representative from NC Capital Management Trust
- August 28 – Met with Matthew Simpson regarding new HarborCam
- August 29 – Attended webinar – The State of the American Traveler
- September 17 – Attended Chamber board meeting
- September 17 – Attended HAT meeting
- September 18 – Attended ECEDC board meeting
- September 18 – Conference call with TwoSix Digital
- September 18 – Attended webinar – Holiday Events
- September 19 – Attended ECDI board meeting
- September 19 – Held Visitor Experience committee meeting
- September 19 – Attended and volunteered at Chamber Expo
- September 20 – Met with HAT representatives and BB&T Bank
- September 20 – Met with Gwen
- September 20 – Held Finance committee meeting
- September 20 – Lunch meeting with Peter Thomson
- September 20 – Met with Joe & Carolyn Peel





2019 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 – August 2019</i>														
Occupancy	67.1%	+0.2% from July '18	64.6%	-1.3%	53.5%	-2.0%	76.4% <i>**Rooms Avail: -19.6%</i>	+4.3% <i>**Rooms Sold: -16.1%</i>	73.6%	-8.1%	76.5%	+4.7%		
ADR	\$100.53	+1.0%	\$89.98	+10.4%	\$81.25	+5.1%	\$115.58	+13.2%	\$232.55	+3.0%	\$100.05	+3.9%		
RevPAR	\$67.47	+1.2%	\$58.11	+8.9%	\$43.45	+3.0%	\$88.36	+18.1%	\$171.12	-5.3%	\$76.51	+8.8%		
<i>Year to Date – January to August 2019</i>														
Occupancy	64.0%	+7.8% from 2018	64.4%	+7.9%	54.3%	+4.8%	80.6%	+16.2% <i>**Rooms Sold: -6.7%</i>	62.8%	-2.5%	64.2%	-7.6%		
ADR	\$92.64	+0.3%	\$87.72	+8.4%	\$81.06	+3.4%	\$113.10	+12.4%	\$178.23	+2.2%	\$94.88	+5.1%		
RevPAR	\$59.32	+8.1%	\$56.50	+16.9%	\$44.04	+8.3%	\$91.18	+30.6%	\$112.01	-0.3%	\$60.95	-2.9%		

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: 10/12 properties; total rooms: 934/990

ADR= Average Daily Rate

RevPAR= Revenue Per Available Room



- Free Waterfront Wifi – back at Mariner's Wharf Park
- HarborCam – down, but in progress to be replaced

Collaborative Wayfinding Project

- RFP published – 8/1/2019
- Proposals Received – 9/20/2019
- Present to Boards – October 2019





Visit Elizabeth City

Past, Non-Leisure, and Prospective Visitors Survey

September 26, 2019

Methodology

- Visit Elizabeth City worked together with SIR to develop **three** 17-minute online surveys among the following segments:
 - **Past Visitors to Elizabeth City**
 - **Non-Leisure Visitors to Elizabeth City**
 - **Prospective Visitors to Elizabeth City**
- Survey respondents were gathered in two ways:
 - A list of 11,452 potential contacts provided by Visit Elizabeth City
 - A national survey sample provider
- Surveys were in the field from August 13 – September 3, 2019

Methodology

- The three visitor segments:
 - **Past Visitors to Elizabeth City: n = 361**
 - **Non-Leisure Visitors to Elizabeth City: n = 69**
 - **Prospective Visitors to Elizabeth City: n = 199**



Past Visitors

Those who have visited Elizabeth City at least once. Most (75%) visited within the past 5 years.



Non-Leisure Visitors

Those who visited for:

- Business or meeting (non-Coast Guard related)
- Coast Guard related work
- Potential relocation
- College tour or reunion visit

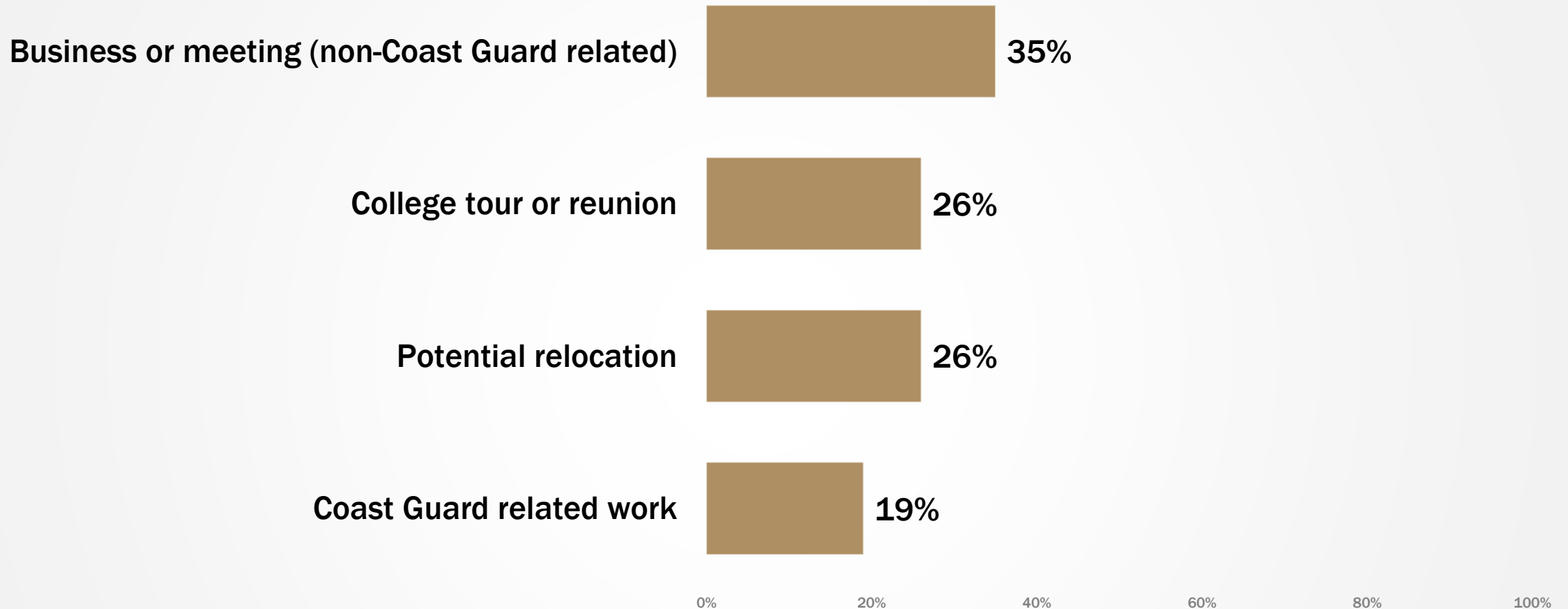


Prospective Visitors

Those who are aware of EC but have never visited (yet!)



Business or a meeting is the reason most Non-Leisure Visitor respondents were in Elizabeth City



DEMOGRAPHIC INFORMATION

Gender, Generation, Income, Children in Household

DEMOGRAPHIC	GROUP	PAST VISITORS	PROSPECTIVE VISITORS	NON-LEISURE VISITORS
GENDER	Male	40%	32%	41%
	Female	60%	68%	59%
GENERATION	Millennials (born 1983–1999)	21%	16%	26%
	Generation X (born 1965–1982)	32%	36%	30%
	Boomers (born 1946–1964)	47%	48%	43%
ANNUAL HOUSEHOLD INCOME	Average total household income	\$69K	\$65K	\$65K
CHILDREN UNDER 18 IN HOUSEHOLD	Children in household	30%	29%	28%

11 Note: Nearly all questions included a “prefer not to answer” option. The proportion selecting “prefer not to answer” is not presented above, so percentages may not sum to 100 percent.



DEMOGRAPHIC INFORMATION

Race and Ethnicity

DEMOGRAPHIC	GROUP	PAST VISITORS	PROSPECTIVE VISITORS	NON-LEISURE VISITORS
RACE	White	78%	83%	71%
	Black or African-American	19%	14%	27%
	Asian	1%	3%	3%
	American Indian or Alaska Native	2%	2%	6%
	Native Hawaiian or Pacific Islander	1%	0%	0%
	Other	2%	2%	2%
HISPANIC ETHNICITY	Hispanic or Latino	1%	5%	6%
	Not Hispanic or Latino	99%	95%	94%

DEMOGRAPHIC INFORMATION

Military Service and Marital Status

DEMOGRAPHIC	GROUP	PAST VISITORS	PROSPECTIVE VISITORS	NON-LEISURE VISITORS
MILITARY SERVICE	Yes, in the Coast Guard	1%	1%	3%
	Yes, in another military branch	13%	16%	15%
	No	86%	83%	82%
MARITAL STATUS	Married	55%	56%	56%
	Single	22%	16%	24%
	Separated	2%	3%	0%
	Divorced	10%	11%	10%
	Living with partner	6%	11%	7%
	Widowed	5%	4%	3%



Past Visitor respondents live mostly in Virginia and North Carolina





6 key findings from the Visit Elizabeth City visitor study.

Top three words to describe Elizabeth City

PAST
VISITORS



Top three words to describe Elizabeth City

NON-LEISURE
VISITORS



Top three words to describe Elizabeth City

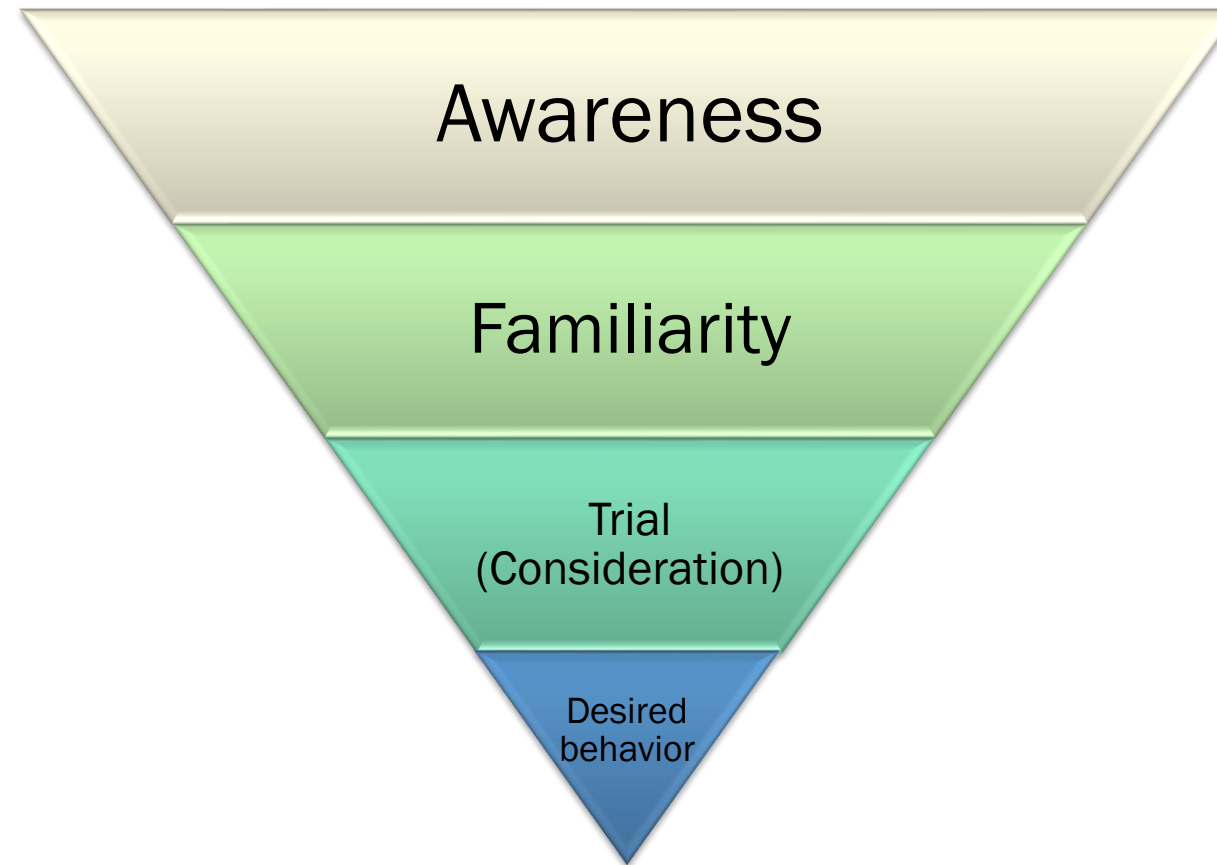
PROSPECTIVE
VISITORS



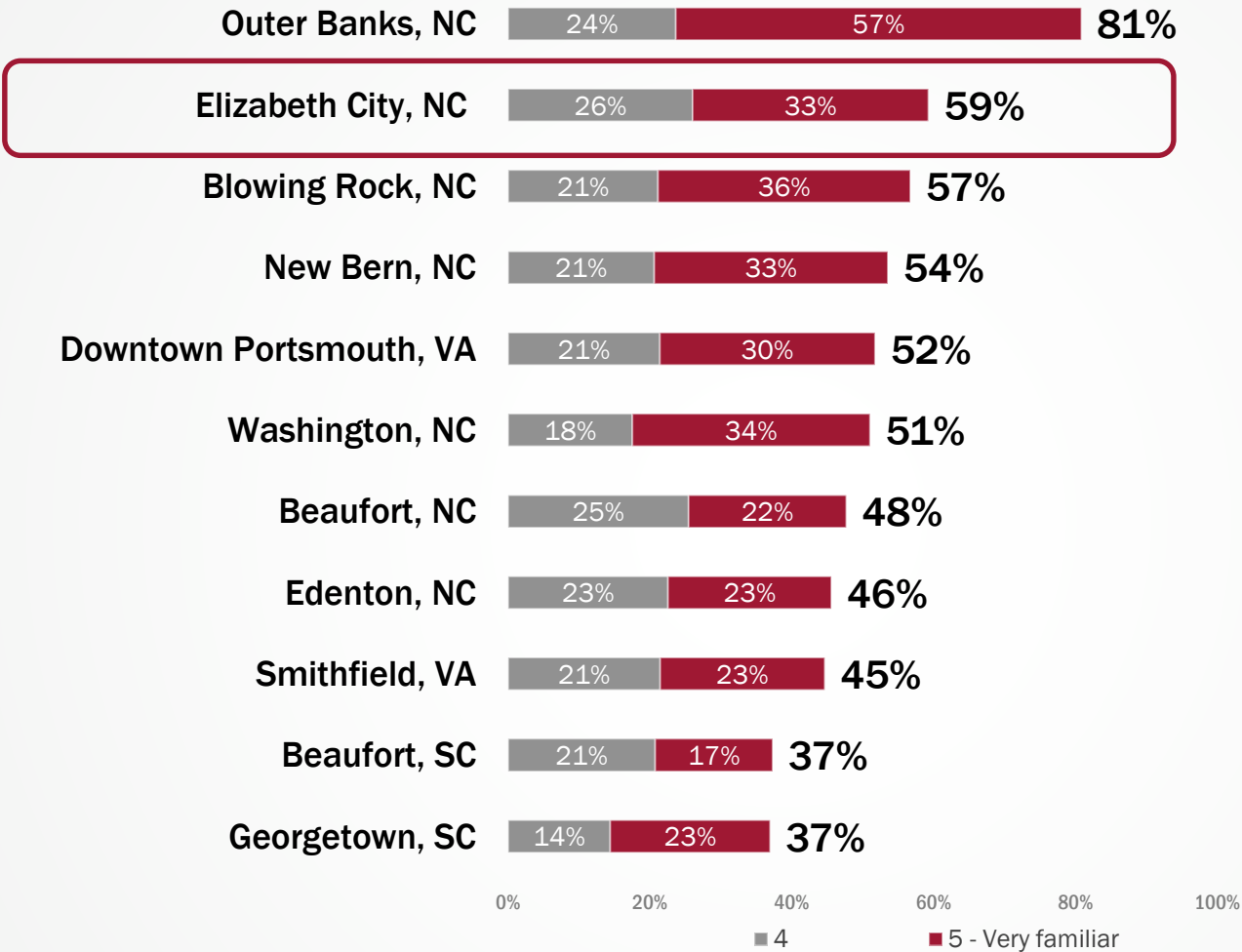
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Elizabeth City has a
positive perception -
most notably as a small
quaint destination

TRADITIONAL MARKETING FUNNEL

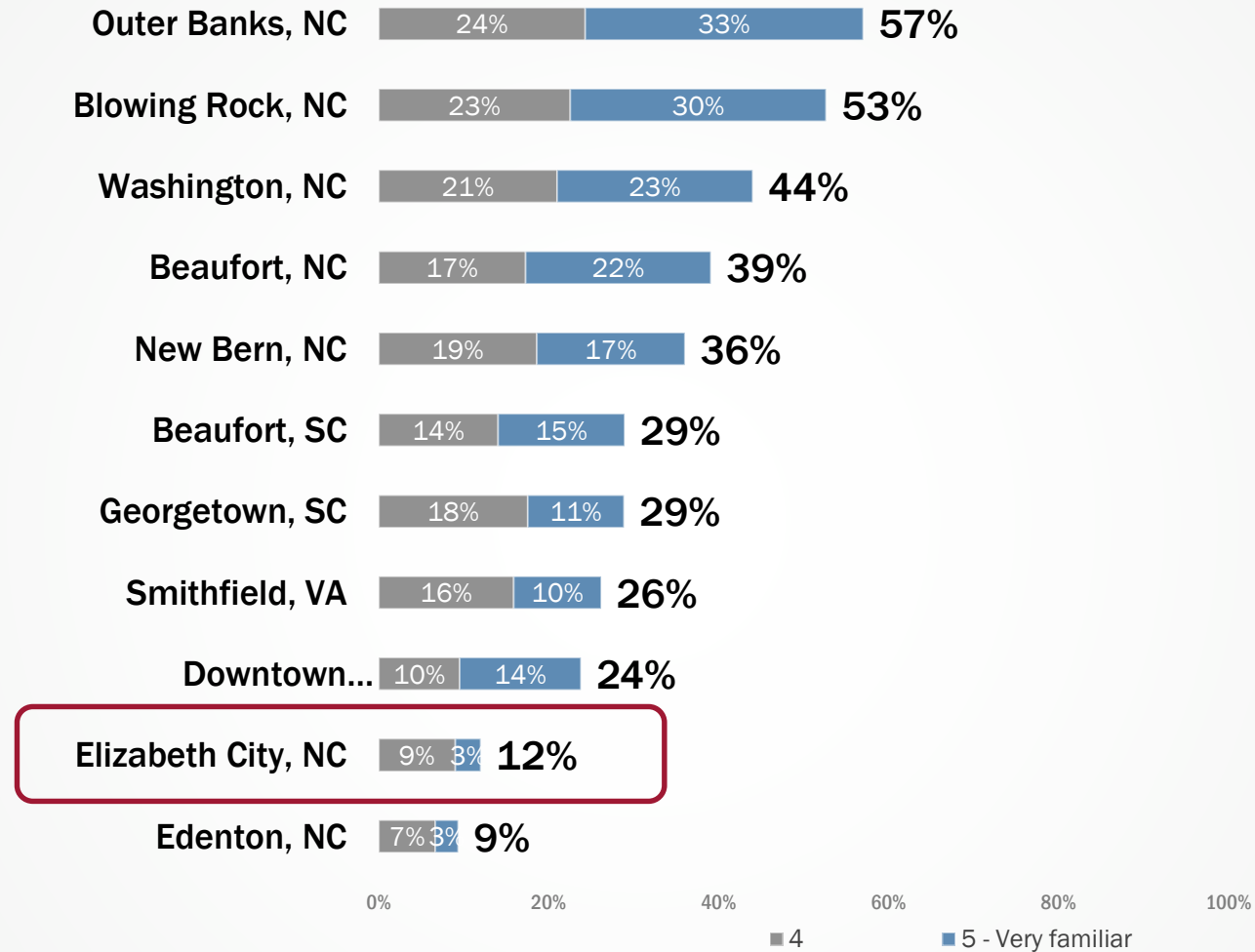


Three in five Past Visitor respondents say they are familiar with Elizabeth City





Prospective Visitors are most **familiar** with the Outer Banks, while only 12 percent feel familiar with Elizabeth City



FAMILIARITY WITH ELIZABETH CITY

59%

**Past
Visitors**

59%

**Non-Leisure
Visitors**

12%

**Prospective
Visitors**

2

There is an opportunity to improve levels of familiarity with Elizabeth City and all the destination has to offer.

Residents play a significant role with their out-of-town friends & family

PAST VISITORS

53%

Learned about
Elizabeth City through
“word of mouth”

The number **one** reason for their
visit was to see **friends and
family**

Say **friends and
family** are the most
important
information source
when planning a trip.

63%

PROSPECTIVE VISITORS

44%

Learned about
Elizabeth City through
“word of mouth”

Say **friends and
family** are the most
important
information
source when
planning a trip.

78%

3

Visit Elizabeth City should strongly consider creating a local tourism ambassador program to equip residents with strategies to convey all there is to see and do, showcase the best spots, and encourage friends and family to visit.

RATIONAL VACATION ATTRIBUTES OPPORTUNITY MAP

IMPORTANCE

BEST GROWTH OPPORTUNITY

- Offers quality lodging options
- Variety of dining options
- Variety of lodging options
- Offers quality dining options
- Offers a variety of activities

REINFORCE

- Affordable destination
- Is fun
- Is easy to get to
- Is safe
- Has beautiful scenery
- Is relaxing
- Hassle free experience
- Authentic

VALUE-ADD SATISFIERS

- Embraces culture
- Offers outdoor recreation options
- Events
- Has entertainment and nightlife

ALREADY WORKING

- Is family-friendly
- Has access to water (water activities)

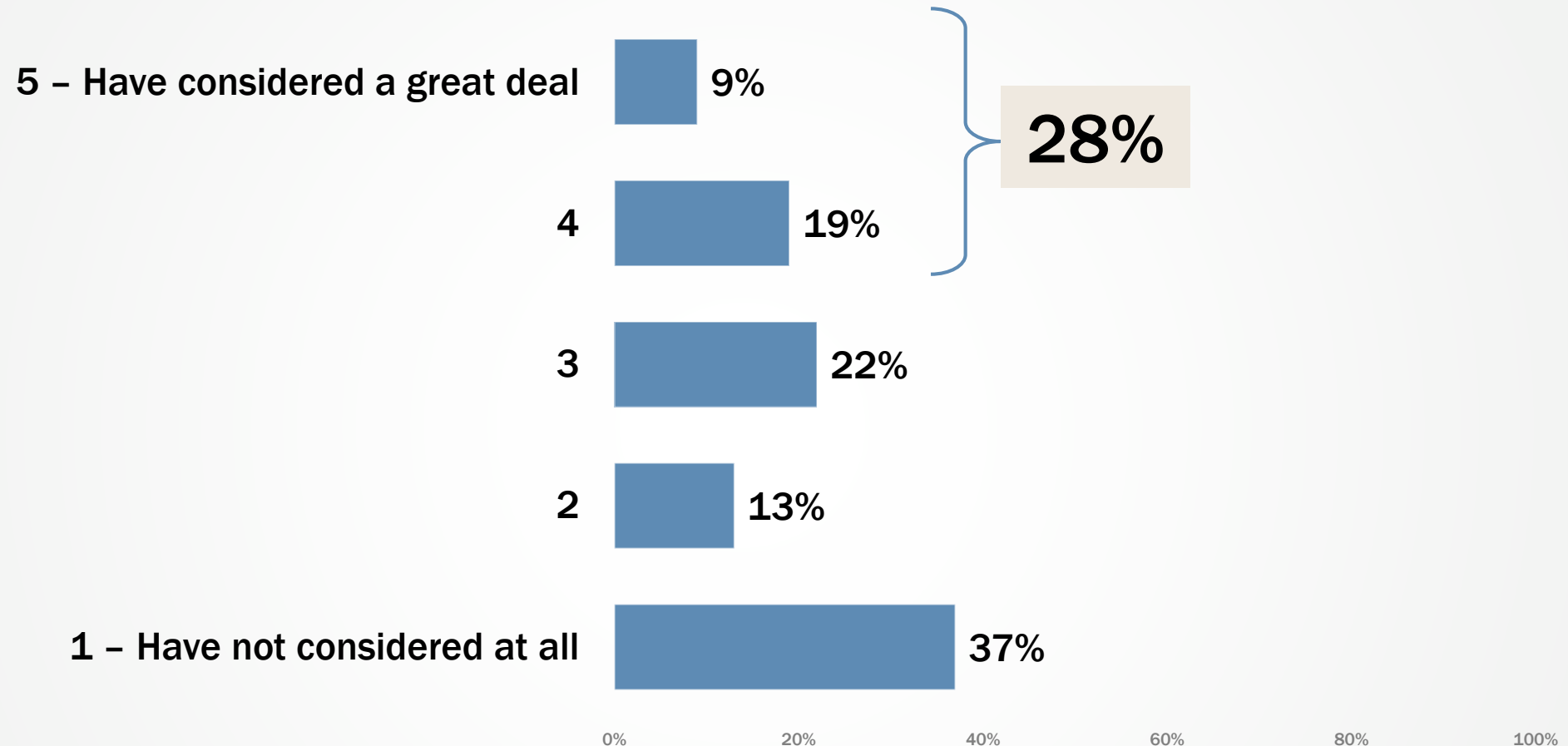
PERFORMANCE

4

Lodging, dining, and having a variety of activities are key areas of focus for Elizabeth City to better meet the expectations of visitors.



Roughly a quarter of Prospective Visitor respondents have considered a visit to Elizabeth City in the past





What are any locations you visited in lieu of Elizabeth City?





5

Focus on building messages around the many emotional attributes that are strongly correlated to visitation intent. In addition, these respondents look to friends and family the most for information. This further points to the need to create a local tourism ambassador program.

Potential product development – Top 5

Q34. Elizabeth City is considering investing in creating more activities and experiences to enhance its downtown / waterfront districts. How interested would you be in each of the following?

WATER-RELATED ACTIVITIES	PERCENT INTERESTED	DOWNTOWN DISTRICT	PERCENT INTERESTED
Dining on the waterfront	82%	Casual dining options	84%
Pedestrian walking trails (a boardwalk along the water)	75%	Live music venue	67%
Holiday lights festival over the water	73%	Fine dining options	64%
Concerts and festivals on the waterfront	70%	Coffee shop	64%
Activities which afford unique views of the waterfront and natural landscape	69%	Retail and boutiques	62%

6

Focus on food & activities! When it comes to potential new product development, respondents across the board are interested in dining options and experiences near the waterfront.





Christmas in Elizabeth City



2019 Calendar	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
NOVEMBER					1	2	3
	4	5	6	7	8	9	10
	11 Veterans Day	12	13	14	15	16	17
						MoA Designer Workshop, 10am-1pm	
	18	19	20	21	22	23	24
				Center Players Fall Show	Center Players Fall Show	Center Players Fall Show	Center Players Fall Show
						Port Disc. seasonal wheel	
	25	26	27	28 Thanksgiving	29	30	
					Holiday Celebration / Downtown Illumination 6-8pm	Small Business Sat., 10-2	
					Port Disc. Santa & project	Kids First Turkey Trot	
						Port Disc. Grinch slime	
2019 Calendar	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
DECEMBER							1
	2	3	4	5	6	7	8
					MoA Gingerbread Workshop, 4-5pm	Christmas Parade, 5:30pm	Albemarle Chorale Concert, 4pm
					First Friday ArtWalk, 4-7pm	MoA Holiday Open Hse, 9-4	
					Lighted Boat Parade, 7pm	Christmas Block Party (ECPD)	
					AoA Christmas Concert, 8pm	Port Disc. Christmas Lights	Red: estimated dates
					ECSU Christmas Concert 8pm		
	9	10	11	12	13	14	15
					AoA Gospel Choirs	Port Disc. Frost on a can	
				CoA Christmas play	CoA Christmas play	CoA Christmas play	CoA Christmas play
						ECSU Star Party 7-9pm	
	16	17	18	19	20	21	22
					AoA A Christmas Carol	AoA A Christmas Carol	AoA A Christmas Carol
	23	24	25 Christmas	26	27	28	29

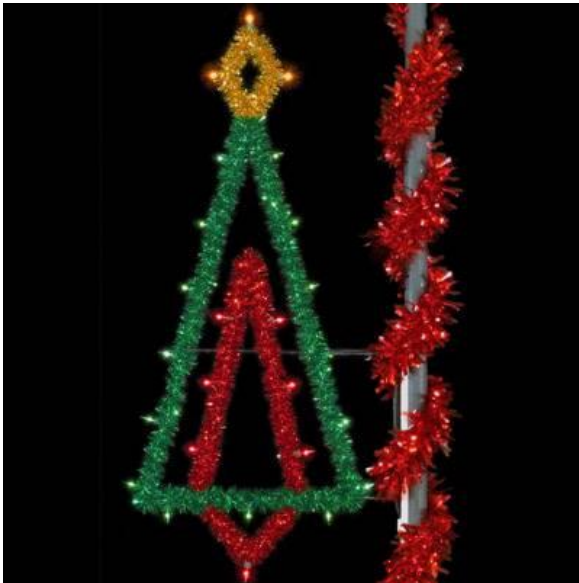
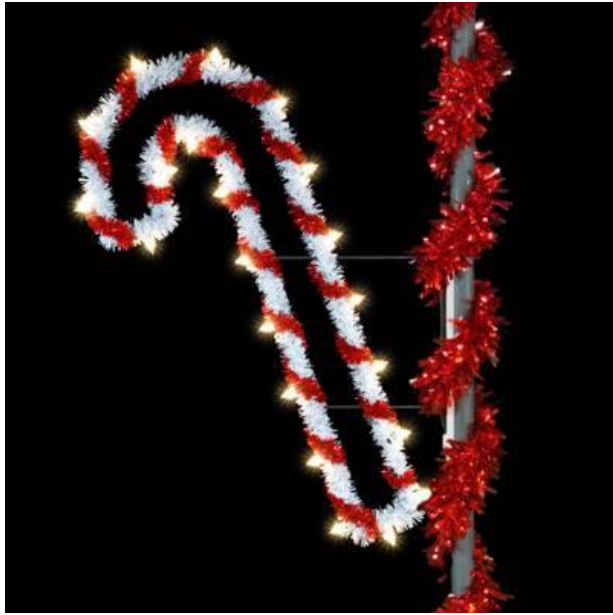


ChristmasInElizabethCity.com



StackAdapt





**Staff & Committee
recommendation:**

Invest up to \$5000 from our reserves, in collaboration with ECDI & the City, to enhance downtown lighting.



Thank you!