

ELIZABETH CITY - PASQUOTANK COUNTY

TOURISM DEVELOPMENT AUTHORITY 2019 STRATEGIC PLAN



VISIT

Elizabeth City
NORTH CAROLINA

INTRODUCTION AND OVERVIEW

In spring 2019 the Elizabeth City - Pasquotank County Tourism Development Authority (TDA) (dba Visit Elizabeth City) embarked upon a strategic planning process to guide the organization's tourism marketing and development efforts for the next five years. With new executive director leadership in place, the strategic plan represents a significant opportunity to shape the visitor economy in Elizabeth City and Pasquotank County into the next decade and beyond.

Destination consultant Magellan Strategy Group was hired to facilitate the planning process with the TDA staff and board. That process commenced with an online survey distributed to area tourism stakeholders (Appendix A). Approximately 50 stakeholders responded to the survey, which asked a variety of open-ended questions regarding the strengths of Elizabeth City as a destination, challenges facing the area as a destination, and examples of other destinations that Elizabeth City can draw upon as aspirational examples.

Following the survey, TDA staff and board met for a half-day planning retreat in early March to review the results and to provide their own input on the future direction of area tourism (Appendix B). This meeting included an overview of the legislation governing the TDA, the board's role in shaping tourism and its fiduciary duties and current destination product development initiatives by other North Carolina tourism development authorities. A follow-up session occurred in late March to review the draft of the plan.

During the planning process, five strategic imperatives were identified for the TDA:

1. Support Tourism-Related Product Development
2. Create a Community Culture for the Support of Tourism
3. Execute Intentional and Intelligent Destination Marketing
4. Build Organizational Capability, Resources, and Professionalism
5. Enhance the Impact of Current Destination Investments

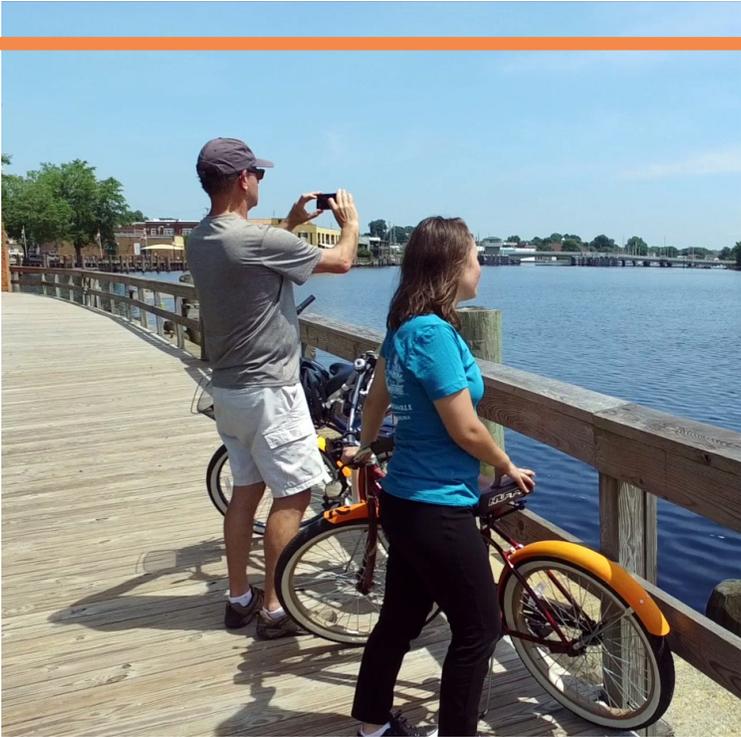
Each of the strategic imperatives has a set of action items associated with it, intended to guide the use of the TDA's fiscal and human resources, and an anticipated date for execution. Additionally, several success metrics have been identified to determine the achievement of the plan holistically and measure its impact upon tourism and the community.





MISSION

Promote overnight visitation that drives economic impact through destination marketing and enhancement of the visitor experience in Elizabeth City and Pasquotank County.



VISION

Become a nationally-recognized, model historic riverfront destination that drives significant economic impact for Elizabeth City and Pasquotank County and welcomes visitors with world class hospitality and experiences.

DESTINATION STRATEGIC IMPERATIVES

The TDA has identified five strategic focal areas that form the core of its five-year plan. Each of these imperatives is accompanied by one or more action items that represent how the TDA will allocate its fiscal and human resources during the plan period. The action items are aspirational yet achievable, but many require the TDA's collaboration with other community and government organizations. While it is focused upon tourism, this plan is intended to be a shared road map with other entities to make Elizabeth City and Pasquotank County a better place to visit and live.



STRATEGIC IMPERATIVE ONE:

SUPPORT TOURISM-RELATED PRODUCT DEVELOPMENT

ACTION ITEMS:

1. Bring community stakeholders together around the enhancement of the Elizabeth City waterfront and avoid duplication of effort by leveraging the ideas in the 2018 waterfront master plan and communicating frequently and openly about potential additions and revisions.

SUCCESS METRIC:
Commencement and/or completion of all the key “starter” projects outlined in the 2018 waterfront master plan (pg 83).

TIMING:
By the end of the five-year tourism strategic plan period (FY 2024).

2. Provide tourism support to water-centered events to promote activity along the waterfront, drive visitation to Elizabeth City, and generate economic development. This includes addressing the infrastructure required to host sporting events such as regattas, fishing tournaments, triathlons or other potential events.

SUCCESS METRIC:
The execution of at least one water-centered event that can be successfully repeated in future years.

TIMING:
Execute first event by FY 2023 (sooner if infrastructure needs allow).

3. Collaborate with other local partners to leverage other opportunities for enhancement of the visitor experience, including the continued revitalization of downtown Elizabeth City.

SUCCESS METRIC:
Convene a community partners forum to discuss related projects, determine priorities, and outline action steps. This forum would include the sharing of market research, best practice examples from other destinations, and opportunities for TDA investment and collaboration.

TIMING:
FY 2020 and then execute annually. Identify any opportunities for TDA investment in partner projects prior to the planning period for each year.

4. Analyze the feasibility and tourism potential of a Coast Guard museum that can build upon the city’s Coast Guard legacy and provide a means of visitor engagement with that history.

SUCCESS METRIC:
Collaborate with other destination partners to develop a feasibility study for the potential attraction.

TIMING:
Complete by FY 2024.

STRATEGIC IMPERATIVE TWO:

CREATE A COMMUNITY CULTURE FOR THE SUPPORT OF TOURISM

ACTION ITEMS:

1. Initiate the “Freakishly Friendly” campaign to inspire residents and businesses to welcome visitors with world-class hospitality.

SUCCESS METRIC:
Campaign launched and updated annually, with new content provided and communicated for partners each year of the plan.

TIMING:
Launch in FY 2020.

2. Use the “Freakishly Friendly” campaign as a means of generating viral promotion of Elizabeth City via social media and public relations.

SUCCESS METRIC:
Secure at least one major regional or national media (digital-only or traditional) exposure.

TIMING:
FY 2020.

3. Establish a National Tourism Week event to celebrate local tourism heroes, educate stakeholders on the importance of the Elizabeth City visitor economy, and build support for tourism-based development initiatives.

SUCCESS METRIC:
Launch event with strong local participation and attendance.

TIMING:
Already planned for FY 2019, to be executed annually.

4. Ramp up other local efforts to build support for tourism, including local influencer fam tours, regular stakeholder communication, and local public relations.

SUCCESS METRIC:
Conduct local influencer fam tour event and initiate stakeholder e-newsletter.

TIMING:
FY 2020.

5. Present the tourism strategic plan and an annual report and plan to city and county stakeholders.

SUCCESS METRIC:
Execute presentations and complete annual report.

TIMING:
Early FY 2020.

STRATEGIC IMPERATIVE THREE:

EXECUTE INTENTIONAL AND INTELLIGENT DESTINATION MARKETING

ACTION ITEMS:

1. Invest in tourism market research to inform destination marketing and product development, enabling the TDA to identify barriers to visitation, target markets, visitor needs, traveler demographics, and key messaging.

SUCCESS METRIC:

Request for proposal already distributed. Complete research and incorporate into planning.

TIMING:

Early FY 2020.

2. Develop, execute, and communicate to stakeholders an annual destination marketing plan, and enable tourism partners to participate as allowed.

SUCCESS METRIC:

Delivery of a completed marketing plan.

TIMING:

FY 2020 and annually thereafter.

3. Continue to grow regional and national awareness of the destination and the associated benefits of a visit to Elizabeth City and Pasquotank County, and inspire overnight visitation through effective destination marketing.

SUCCESS METRIC:

Determine baseline brand awareness using the market research initiative as the methodology and measure again no later than the end of the five-year strategic plan.

TIMING:

Establish benchmark in FY 2020, and reassess in FY 2024.

4. Develop a clear and differentiated destination brand for Elizabeth City.

SUCCESS METRIC:

Issue a request for proposal to identify qualified firms and complete the brand development process, achieving significant stakeholder and community buy-in during the process and during implementation of the brand.

TIMING:

Complete by FY 2021.

STRATEGIC IMPERATIVE FOUR:

BUILD ORGANIZATIONAL CAPABILITY, RESOURCES, AND PROFESSIONALISM

ACTION ITEMS:

1. Achieve professional accreditation for the DMO through completion of the Destinations International Destination Marketing Accreditation Program (DMAP).

SUCCESS METRIC:
Completion of the accreditation process, followed by local communication of the designation to stakeholders and others of its importance.

TIMING:
FY 2021.

2. Evaluate the return on investment potential of the addition of a sales manager responsible for promoting Elizabeth City as a destination for citywide events, amateur sports competitions, SMERF (social, military, educational, religious, and fraternal) groups, motorcoach tours, and other similar types of groups.

SUCCESS METRIC:
Development of an ROI analysis and a decision to hire the position.

TIMING:
Complete analysis in time for FY 2022 budget planning. Revisit the analysis in FY 2024 and assess the realized ROI of the position or the potential ROI if the position not hired.

3. Evaluate the return on investment potential of the addition of an event coordinator and explore the possibility of sharing the position with another community partner.

SUCCESS METRIC:
Development of an ROI analysis and a decision to hire the position, including discussion with potential community partners who can share in funding the position.

TIMING:
Complete analysis in time for FY 2022 budget planning. Revisit the analysis in FY 2024 and assess the realized ROI of the position or the potential ROI if the position has not yet been hired.



STRATEGIC IMPERATIVE FIVE:

ENHANCE THE IMPACT OF CURRENT DESTINATION INVESTMENTS

ACTION ITEMS:

1. Increase the amount of funding available for destination marketing and sales, and minimize budget fragmentation.

SUCCESS METRIC:

Increase the amount of annual funding available for destination marketing and sales by at least 25%.

TIMING:

FY 2020 or 2021.

2. Establish transparent and enforceable policies and processes for how grants and other partnership funding decisions are made, including eligibility, application procedures, alignment with strategic plan, criteria for funding and required follow-up reporting.

SUCCESS METRIC:

The Special Projects Committee will research, develop, and propose recommendations for improvements to the full board.

TIMING:

Preliminary guidelines by FY2020 planning; complete and approved policies and procedures in advance of FY2021 planning.

3. Collaborate with city and county officials to improve the ROI (return on investment) of their tourism-related expenditures made possible by occupancy tax funding.

SUCCESS METRIC:

Decisions on how occupancy tax funding is allocated to city and county tourism-related expenditures are done in full collaboration with the DMO staff and the TDA board, with the TDA board having final approval on all allocations in accordance with its fiduciary duty.

TIMING:

Initiate dialogue with stakeholders in FY 2020, beginning with the rollout of the strategic plan.



4. Collaborate with stakeholders and partners to raise the impact of the TDA's funding to enhance the destination, leveraging their investments for the good of both the community and tourism.

Potential partner organizations include:

- City of Elizabeth City
- Pasquotank County
- Elizabeth City Area Chamber of Commerce
- Area colleges and universities
- Elizabeth City/Pasquotank County Economic Development
- The Committee of 100
- NC Department of Natural and Cultural Resources
- VisitNC
- Elizabeth City Downtown, Inc.
- Other regional destinations
- Sentara Albemarle Medical Center

SUCCESS METRIC:

Convene a community partners forum to discuss related projects, determine priorities, and outline action steps.

This forum would include the sharing of market research, best practice examples from other destinations, and opportunities for TDA investment and collaboration.

TIMING:

FY 2021 and then execute annually. Identify any opportunities for TDA investment in partner projects prior to the planning period for each year.



HOLISTIC SUCCESS METRICS FOR THE TDA'S FIVE-YEAR STRATEGIC PLAN

While each strategic imperative and its associated action items have their own success metrics and timetable for execution, the success of the entire plan can also be assessed by several potential quantitative and qualitative measures. These metrics include:

- **VISITOR SPENDING**—Using data received from US Travel, VisitNC (the public/ private partnership that promotes North Carolina as a destination) reports annual visitor spending figures for each of the state's 100 counties. In calendar 2017, the most recent year for which data is available, US Travel and VisitNC reported \$63 million in visitor spending for Pasquotank County. (The annual update of the data is typically provided by VisitNC in August, so there is a lag of seven to eight months in the reporting.) Stakeholders can also monitor the pace of growth of Pasquotank's visitor spending relative to its peer destinations in North Carolina.
- **TAX AND EMPLOYMENT IMPACTS**—US Travel and VisitNC also report state and local tax receipts created by visitor spending in each county, and the number of jobs and associated payroll directly attributable to that spending. In 2017, visitor spending in Pasquotank County created 500 jobs and \$10.25 million in payroll, and \$5 million in local and state tax receipts.
- **RESEARCH BENCHMARKS**—In fiscal 2020, the results of new market research commissioned by the TDA will be available, providing a unique opportunity for the destination to benchmark key measures of market health. Depending upon the methodology pursued, such metrics include baseline destination brand awareness in key source markets, leisure traveler perceptions of Elizabeth City as a destination, and likelihood to visit or refer others to the area.
- **COMMUNITY PERCEPTION AND AWARENESS**—Measuring the holistic achievement of the TDA's strategic initiatives in this area is more difficult, simply because there are no reliable statistical quantitative metrics available for doing so. But there are a few available means of determining the impact of the TDA in this area. These might include the number of attendees at annual community tourism events; subscribers to stakeholder e-newsletters; participants in a private Facebook group dedicated to area tourism; or something like the number of annual nominees for a "tourism hero" award given by the TDA.



- **OCCUPANCY TAX REVENUE**—This metric is one of the simplest and most reliable measures of plan achievement, although it comes with a caveat. Occupancy tax revenue collected by the county is largely a function of two factors: the daily rate charged at area lodging, and the percent of lodging rooms occupied each night. Destination marketing can move the needle on tax revenue, but the measure is also dependent upon how local hoteliers manage their rate.

- **AVERAGE DAILY RATE**—While this metric is in part dependent upon the area’s lodging operators, it can be a useful metric for assessing the overall health of the lodging market and destination demand. It should be noted, though, that some of the destination visits to the area are not “marketable” trips—they are generated by business or military-related travel, people visiting friends and relatives, or the impacts of hurricanes. Additionally, the opening of new lodging inventory may have an overall positive impact upon occupancy tax revenue but may also lead to a decline in average daily rate and occupancy via increased competition.

- **MAJOR MEDIA RECOGNITION**—Since part of the TDA’s vision is for Elizabeth City to “Become a nationally-recognized, model historic riverfront destination,” achieving media recognition of its progress towards that goal should be viewed as an indicator of success. This measure is dependent upon getting Elizabeth City’s story out to regional and national media.



APPENDIX A

SUMMARY OF RESPONSES FROM THE STAKEHOLDER SURVEY

The objective of the stakeholder survey was to collect a sampling of opinion about the current state of Elizabeth City tourism and was not intended to be a statistically valid quantitative study. The responses summarized below should be considered as directionally informative for the purposes of the planning process.

What Does Elizabeth City Do Well as a Destination?

Many of the responses to this question focused in some way upon Elizabeth City's strategic location on the Pasquotank River and the Intracoastal Waterway, between the Great Dismal Swamp Canal and the Albemarle Sound, and its legacy of welcoming boaters from around the world.

- "Harbor of Hospitality," waterways, its reputation among boaters
- Elizabeth City waterfront
- Hospitality and warmth of residents
- Arts and cultural heritage
- Museum of the Albemarle
- Hub for regional tourism assets
- Pass-through location on the way to other destinations
- Destination marketing tactics employed
- Negative responses, including not enough to do, local attitudes, and "nothing"

What Are the Greatest Challenges Facing Elizabeth City as a Destination?

Respondents focused upon Elizabeth City's waterfront in answering this question, and also noted the importance of the vitality of the downtown area as a component of the riverfront. But some respondents also noted that there have been prior plans to redevelop the waterfront, including the most recent master plan released in 2018, and that follow-through on those plans needs to occur.

- Elizabeth City waterfront
- Continued revival of downtown Elizabeth City
- No follow-through on plans
- Not enough to do for visitors
- Local mindsets, including apathy, lack of pride, silo mentality
- Crime
- Competition from other destinations
- Funding
- Insufficient promotion

What Can Elizabeth City Do to Improve Its Competitiveness as a Destination?

Again, respondents were quite focused on Elizabeth City's waterfront and downtown as the greatest opportunities to improve its ability to attract visitors. However, several respondents also stressed the need for greater investment in destination marketing to enhance the area's competitiveness.

- Improve the Elizabeth City waterfront
- Enhance downtown Elizabeth City
- Diversify visitor offerings, with more to do in the area
- More marketing
- More focused marketing
- New events

Destinations with Qualities and Assets Elizabeth City Should Emulate

Not surprisingly, several waterfront communities in eastern North Carolina were most top-of-mind for respondents to this question, and they were joined by a number of mostly larger waterfront destinations. Several other destinations that are generally known for other attributes such as culinary, arts and culture, and vibrant downtowns were also mentioned.

- New Bern
- Edenton
- Little Washington
- Beaufort (NC)
- Various river-focused cities: Charleston (SC), Savannah, Wilmington, Southport, Richmond, Philadelphia, Norfolk
- Other destinations: Waynesville, Blowing Rock, Carolina Beach, Asheville, Mount Airy, Dunn, Rocky Mount, Greenville (SC), Santa Fe, New Hope (PA)

If There Was One Thing You Could Change About Elizabeth City Tourism...

This question elicited a wide variety of responses, including (again) improving Elizabeth City's waterfront and downtown. But a number of responses were also focused upon the opportunity for greater collaboration, as well as increasing and sharpening the TDA's marketing investment.

- Revitalization of Elizabeth City's downtown and waterfront
- More homegrown businesses
- More racial diversity
- More marketing, and more targeted marketing
- Longer visitor season
- Greater understanding and communication of our brand
- More marketing of events
- Greater engagement with local colleges
- Change local perceptions about Elizabeth City as a destination
- More TDA staff
- Greater collaboration with other entities
- More credit given to the TDA

APPENDIX B

SITUATIONAL ANALYSIS

Following a presentation of the stakeholder survey responses during the TDA planning retreat in early March 2019, board and staff participated in an exercise to identify and discuss the destination's strengths, opportunities, restraints, and aspirations. These insights were used to provide the foundation of the strategic plan.

STRENGTHS

- Elizabeth City's waterfront
- Stopover location on the way to the Outer Banks
- Location in proximity to major metro areas (Virginia Tidewater, Richmond, Washington DC, Raleigh/Durham) and as a midpoint on the East Coast
- Architecture
- History
- Friendliness ("Freakishly friendly")
- Museum of the Albemarle
- Strong representation on the TDA Board
- Fiscal security
- Higher education (three area colleges and universities)
- Arts and culture
- A Coast Guard community
- Forward-thinking, energetic community
- Downtown Elizabeth City
- Quaintness and small-town charm

OPPORTUNITIES

- Completion of the Elizabeth City waterfront plan
- Revival of downtown Elizabeth City
- Transportation to facilitate connections between area assets
- Public restrooms in the downtown area
- Educate front-line staff about the destination and to be "always on" ("train the trainer" who will be responsible for working with front-line staff at area businesses)
- Collaboration - work better with the city and county
- Sports tourism marketing and sales
- Educate on the role of the TDA and the value of tourism by going to stakeholders
- Execute a signature waterfront event (e.g. similar to Providence's WaterFire)
- "Put our money where our mouth is" and invest in development of assets
- Underground Railroad connection
- East Coast Greenway
- Coast Guard community
- Get community out of the reactive cycle and implement planning

RESTRAINTS

- Elizabeth City waterfront
- Lack of destination assets
- Funding
- Perception of the community (both externally and internally)
- Silo mentality among community organizations
- “We’ve always done it this way” attitude
- Destination location (e.g. not a beach destination)
- Fragmented TDA budget allocation - need to articulate the vision and strategy of why funding is invested the way it is
- Partners who are challenged fiscally

ASPIRATIONS

- An enhanced, pedestrian-friendly Elizabeth City waterfront
- Great visitor satisfaction with the destination experience and all tourism partners
- Retail that’s open for visitors to enjoy
- Pedestrian friendly, safe walking tours
- Increased destination awareness, both externally and internally
- Increased number of destination assets
- A central information resource for community events
- More overnight stays
- Completion of a destination plan
- Engaged in “local” marketing – change perceptions and communicate destination marketing organization activity and impact
- Grow the resources of the CVB (fiscal and human)
- Renovation of the Southern Hotel
- A way for visitors to connect to the community’s Coast Guard legacy