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
  – Prospective Visitors to Elizabeth City: n = 199
  – Non-Leisure Visitors to Elizabeth City: n = 69

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

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

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
V. Prospective Visitors Survey
The primary trip purpose is to visit friends and family. Half of visitors say Elizabeth City is a primary destination for others it is typically a stop on their way to or from OBX.
Respondents’ main reasons for visiting Elizabeth City were seeing family or friends, going on vacation, and for its proximity to the Outer Banks.

Q11. What were the main reasons for your most recent trip to Elizabeth City?

Note: question asked among those who have visited Elizabeth City in Q5

- Visit family or friends: 34%
- Vacation or getaway: 29%
- Proximity to the Outer Banks: 28%
- Historic sites: 17%
- Shopping: 14%
- Outdoor recreation: 11%
- Recreational opportunities on the water: 9%
- Arts and cultural activities: 8%
- Festival or event: 7%
- Youth sports event: 1%
- Landscape painting: 1%
- Other: 14%

n = 361
For more than half of Past Visitor respondents, Elizabeth City was their primary destination.

- **Primary destination**: 53%
- **Secondary destination**: 31%
- **Stop-over destination**: 16%

19% of past visitors were on their way to/from the Outer Banks.

Q12. Was your most recent trip to Elizabeth City a primary or secondary destination?
Q14. Did you stay in Elizabeth City either on your way to or from a trip to the Outer Banks?
Most Past and Prospective Visitor respondents first heard about Elizabeth City through WORD OF MOUTH followed distantly by highway signage.

Q. How did you first hear about Elizabeth City?

Past n = 361
Prospective n = 199

Top 5 options shown:

- **Word of mouth**: Past Visitors 53%, Prospective 44%
- **Highway signage**: Past Visitors 11%, Prospective 16%
- **Print advertisements**: Past Visitors 4%, Prospective 10%
- **Facebook advertisements**: Past Visitors 1%, Prospective 7%
- **College-related activity, meeting, or event**: Past Visitors 4%, Prospective 3%
Family and friends followed by official destination websites are the most important information sources

<table>
<thead>
<tr>
<th>Information Source</th>
<th>Past Visitors</th>
<th>Prospective</th>
</tr>
</thead>
<tbody>
<tr>
<td>Family and friends</td>
<td>63%</td>
<td>78%</td>
</tr>
<tr>
<td>Official destination websites</td>
<td>44%</td>
<td>72%</td>
</tr>
<tr>
<td>Travel review/blogs</td>
<td>34%</td>
<td>50%</td>
</tr>
<tr>
<td>Full service travel websites</td>
<td>33%</td>
<td>35%</td>
</tr>
<tr>
<td>Promoted promotional materials</td>
<td>25%</td>
<td>51%</td>
</tr>
<tr>
<td>State and local welcome centers</td>
<td>25%</td>
<td>40%</td>
</tr>
<tr>
<td>Social media</td>
<td>23%</td>
<td>40%</td>
</tr>
<tr>
<td>Travel publications</td>
<td>18%</td>
<td>38%</td>
</tr>
<tr>
<td>Official destination and social media sites</td>
<td>20%</td>
<td>40%</td>
</tr>
<tr>
<td>Advertisements</td>
<td>14%</td>
<td>20%</td>
</tr>
</tbody>
</table>

Q. Which information sources are typically important to you when planning a vacation or getaway?

Past n = 361
Prospective n = 199
Business or a meeting is the reason most Non-Leisure Visitor respondents were in Elizabeth City.

Q11. What were the main reasons for your most recent trip to Elizabeth City?

- Business or meeting (non-Coast Guard related): 35%
- College tour or reunion: 26%
- Potential relocation: 26%
- Coast Guard related work: 19%

EXPLORED ELIZABETH CITY: 48%
AVERAGE NIGHTS IN ELIZABETH CITY: 2.8

n = 69
Elizabeth City has a positive perception and visitors are satisfied with their experience on their trip. But there are some opportunities to improve these scores.
Top three words to describe Elizabeth City

PAST VISITORS
- Quaint
- Friendly
- Small
- Rural
- Coastal
- Quiet
- Water
- Beautiful
- Historic
- Country
- Fun
- Family
- Old
- Town
- Coastal
- Waterfront
- Relaxing
- Scenic
- Beautiful
- Historic
- Good
- River
- Beach
- Pretty
- Historic
- College
- Pretty
- Relaxing
- Small
- River
- Old
- Pretty
- Waterfront
- Family
- Town
- Coastal
- Scenic
- Beautiful
- Historic
- Fun
- Peaceful
- Family
- Authentic
- Small
- Old
- Quiet
- Coastal
- Fun
- Scenic
- Beautiful
- Historic
- Historic
- Water
- Family
- Authentic
- Coastal
- Adventure
- Scenic
- Beautiful
- Historic
- Water
- Fun
- Peaceful
- Family
- Authentic
- Coastal
- Adventure
- Scenic
- Beautiful
- Historic
- Water
More than three-quarters of Past Visitors and more than two thirds of Non-Leisure respondents are satisfied with their most recent trip to Elizabeth City.
Nine in 10 Past Visitor and Non-Leisure respondents say their experience visiting Elizabeth City met or exceeded their expectations

Q20. How well did your experience visiting Elizabeth City meet your expectations?

PAST VISITORS

- 5 - Exceeded my expectations: 21%
- 3 - Met my expectations: 48%
- 1 - Did not meet my expectations: 5%

NON-LEISURE VISITORS

- 5 - Exceeded my expectations: 28%
- 3 - Met my expectations: 52%
- 1 - Did not meet my expectations: 0%
Elizabeth City’s biggest opportunity is to build familiarity. Those who are more familiar give higher ratings across the board.
Traditional marketing funnel

For past visitors, desired behavior is repeat visitation
Three in five Past Visitor respondents say they are familiar with Elizabeth City.

<table>
<thead>
<tr>
<th>Destination</th>
<th>Awareness</th>
<th>Familiarity</th>
<th>Trial/Consideration</th>
<th>Repeat Visitation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outer Banks, NC</td>
<td>24%</td>
<td>57%</td>
<td>81%</td>
<td></td>
</tr>
<tr>
<td>Elizabeth City, NC</td>
<td>26%</td>
<td>33%</td>
<td>59%</td>
<td></td>
</tr>
<tr>
<td>Blowing Rock, NC</td>
<td>21%</td>
<td>36%</td>
<td>57%</td>
<td></td>
</tr>
<tr>
<td>New Bern, NC</td>
<td>21%</td>
<td>33%</td>
<td>54%</td>
<td></td>
</tr>
<tr>
<td>Downtown Portsmouth, VA</td>
<td>21%</td>
<td>30%</td>
<td>52%</td>
<td></td>
</tr>
<tr>
<td>Washington, NC</td>
<td>18%</td>
<td>34%</td>
<td>51%</td>
<td></td>
</tr>
<tr>
<td>Beaufort, NC</td>
<td>25%</td>
<td>22%</td>
<td>48%</td>
<td></td>
</tr>
<tr>
<td>Edenton, NC</td>
<td>23%</td>
<td>23%</td>
<td>46%</td>
<td></td>
</tr>
<tr>
<td>Smithfield, VA</td>
<td>21%</td>
<td>23%</td>
<td>45%</td>
<td></td>
</tr>
<tr>
<td>Beaufort, SC</td>
<td>21%</td>
<td>17%</td>
<td>37%</td>
<td></td>
</tr>
<tr>
<td>Georgetown, SC</td>
<td>14%</td>
<td>23%</td>
<td>37%</td>
<td></td>
</tr>
</tbody>
</table>

Q4. How familiar are you with each of the following destinations: Note: question asked among those aware of in Q3.
Non-Leisure Visitor respondents are most familiar with the Outer Banks, and about three in five feel familiar with Elizabeth City.

<table>
<thead>
<tr>
<th>Destination</th>
<th>Awareness</th>
<th>Familiarity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outer Banks, NC</td>
<td>26%</td>
<td>50%</td>
</tr>
<tr>
<td>Elizabeth City, NC</td>
<td>28%</td>
<td>32%</td>
</tr>
<tr>
<td>Edenton, NC</td>
<td>23%</td>
<td>31%</td>
</tr>
<tr>
<td>Blowing Rock, NC</td>
<td>32%</td>
<td>19%</td>
</tr>
<tr>
<td>Smithfield, VA</td>
<td>24%</td>
<td>27%</td>
</tr>
<tr>
<td>New Bern, NC</td>
<td>20%</td>
<td>31%</td>
</tr>
<tr>
<td>Downtown Portsmouth,...</td>
<td>15%</td>
<td>35%</td>
</tr>
<tr>
<td>Washington, NC</td>
<td>24%</td>
<td>26%</td>
</tr>
<tr>
<td>Beaufort, NC</td>
<td>28%</td>
<td>22%</td>
</tr>
<tr>
<td>Beaufort, SC</td>
<td>28%</td>
<td>9%</td>
</tr>
<tr>
<td>Georgetown, SC</td>
<td>8%</td>
<td>12%</td>
</tr>
</tbody>
</table>

Q4. How familiar are you with each of the following destinations:
Note: question asked among those aware of in Q3

Non-Leisure Visitors
Prospective Visitors are most familiar with the Outer Banks, while only 12 percent feel familiar with Elizabeth City.

Q4. How familiar are you with each of the following destinations: Note: question asked among those aware of in Q3

- Outer Banks, NC: 24% (4), 33% (3), 57% (5)
- Blowing Rock, NC: 23% (4), 30% (3), 53% (5)
- Washington, NC: 21% (4), 23% (3), 44% (5)
- Beaufort, NC: 17% (4), 22% (3), 39% (5)
- New Bern, NC: 19% (4), 17% (3), 36% (5)
- Beaufort, SC: 14% (4), 15% (3), 29% (5)
- Georgetown, SC: 18% (4), 11% (3), 29% (5)
- Smithfield, VA: 16% (4), 10% (3), 26% (5)
- Downtown: 10% (4), 14% (3), 24% (5)
- Elizabeth City, NC: 9% (4), 12% (3), 12% (5)
- Edenton, NC: 7% (4), 9% (3), 9% (5)

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

Q18. How strongly have you considered Elizabeth City for a vacation or getaway in the past?

- 1 - Have not considered at all: 37%
- 2 - Have considered somewhat: 13%
- 3 - Have considered a fair amount: 22%
- 4 - Have considered a great deal: 19%
- 5 - Have considered a great deal: 9%

Total respondents: n = 199
Nearly three in five Past Visitor respondents say they are likely to make a return trip to Elizabeth City.
Nearly half of Non-Leisure Visitor respondents plan to make a return trip to Elizabeth City in the future.

Q24. How likely are you to make a trip to Elizabeth City in the future for a vacation or getaway?

- 5 – Very likely: 36%
- 4: 9%
- 3: 30%
- 2: 9%
- 1 – Not at all likely: 16%
Nearly two in five Prospective Visitor respondents say they are likely to visit Elizabeth City for a leisure trip in the future.

Q22. How likely are you to travel to Elizabeth City for leisure in the future?

Note: don’t know responses removed from data

- Very likely: 39%
- Somewhat likely: 31%
- Neither likely nor unlikely: 23%
- Somewhat unlikely: 16%
- Not at all likely: 17%

n = 199
The biggest opportunity for Elizabeth City is building familiarity among all types of visitors.

<table>
<thead>
<tr>
<th>DEMOGRAPHIC</th>
<th>PAST VISITORS</th>
<th>PROSPECTIVE VISITORS</th>
<th>NON-LEISURE VISITORS</th>
</tr>
</thead>
<tbody>
<tr>
<td>AWARENESS</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
</tr>
<tr>
<td>FAMILIARITY</td>
<td>59%</td>
<td>12%</td>
<td>59%</td>
</tr>
<tr>
<td>CONSIDERATION</td>
<td>--</td>
<td>28%</td>
<td>--</td>
</tr>
<tr>
<td>DESIRED BEHAVIOR (REPEAT VISITION/INTENT TO VISIT)</td>
<td>58%</td>
<td>39%</td>
<td>45%</td>
</tr>
</tbody>
</table>
Being familiar with Elizabeth City “lifts” overall likeliness to visit again

LIKELY TO RETURN TO ELIZABETH CITY

+32

39%
Not familiar (1-3 rating)

71%
Familiar (4-5 rating)

Q25. How likely are you to make a return trip to Elizabeth City?
Being familiar with Elizabeth City “lifts” overall satisfaction with their visit

SATISFIED WITH TRIP VISIT TO ELIZABETH CITY

+16

67%

83%

Not familiar (1-3 rating)  
Familiar (4-5 rating)
And, being familiar with Elizabeth City “lifts” overall likeliness to recommend a trip to Elizabeth City.

Q18. Overall, how likely are you to recommend Elizabeth City as a place to visit to friends or family members?

NPS

Familiar

19

Not familiar

-23

+42

n = 361
Elizabeth City has an opportunity to improve the quality and variety of lodging and dining options, or awareness of these. There are also opportunities for water-related product development.
RATIONAL VACATION ATTRIBUTES OPPORTUNITY MAP

BEST GROWTH OPPORTUNITY
- Offers quality lodging options
- Variety of dining options
- Variety of lodging options
- Offers quality dining options
- Offers a variety of activities

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

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

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

PAST VISITORS
Prospective visitors desire quality and variety when it comes to both lodging and dining.

Q8. The following is a list of attributes that can characterize or be used to describe a vacation or getaway in general. Please rate how important each of the following attributes is to you:

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Rating 4</th>
<th>Rating 5</th>
<th>Very Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Affordable destination</td>
<td>23%</td>
<td>72%</td>
<td>95%</td>
</tr>
<tr>
<td>Is safe</td>
<td>18%</td>
<td>76%</td>
<td>94%</td>
</tr>
<tr>
<td>Is fun</td>
<td>29%</td>
<td>63%</td>
<td>92%</td>
</tr>
<tr>
<td>Is relaxing</td>
<td>25%</td>
<td>67%</td>
<td>92%</td>
</tr>
<tr>
<td>Hassle free experience</td>
<td>35%</td>
<td>55%</td>
<td>90%</td>
</tr>
<tr>
<td>Has beautiful scenery</td>
<td>33%</td>
<td>54%</td>
<td>87%</td>
</tr>
<tr>
<td>Offers quality lodging options</td>
<td>32%</td>
<td>51%</td>
<td>83%</td>
</tr>
<tr>
<td>Variety of lodging options</td>
<td>36%</td>
<td>47%</td>
<td>83%</td>
</tr>
<tr>
<td>Is easy to get to</td>
<td>33%</td>
<td>48%</td>
<td>81%</td>
</tr>
<tr>
<td>Offers a variety of activities</td>
<td>44%</td>
<td>37%</td>
<td>81%</td>
</tr>
<tr>
<td>Variety of dining options</td>
<td>32%</td>
<td>48%</td>
<td>80%</td>
</tr>
<tr>
<td>Offers quality dining options</td>
<td>34%</td>
<td>44%</td>
<td>78%</td>
</tr>
<tr>
<td>Authentic</td>
<td>36%</td>
<td>42%</td>
<td>78%</td>
</tr>
<tr>
<td>Is family-friendly</td>
<td>22%</td>
<td>43%</td>
<td>65%</td>
</tr>
<tr>
<td>Embraces culture</td>
<td>33%</td>
<td>28%</td>
<td>61%</td>
</tr>
<tr>
<td>Has access to water (water activities)</td>
<td>29%</td>
<td>30%</td>
<td>59%</td>
</tr>
<tr>
<td>Events</td>
<td>33%</td>
<td>23%</td>
<td>56%</td>
</tr>
<tr>
<td>Offers outdoor recreation options</td>
<td>28%</td>
<td>28%</td>
<td>56%</td>
</tr>
<tr>
<td>Has entertainment and nightlife</td>
<td>22%</td>
<td>23%</td>
<td>45%</td>
</tr>
</tbody>
</table>
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?

<table>
<thead>
<tr>
<th>WATER-RELATED ACTIVITIES</th>
<th>PERCENT INTERESTED</th>
<th>DOWNTOWN DISTRICT</th>
<th>PERCENT INTERESTED</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dining on the waterfront</td>
<td>82%</td>
<td>Casual dining options</td>
<td>84%</td>
</tr>
<tr>
<td>Pedestrian walking trails (a boardwalk along the water)</td>
<td>75%</td>
<td>Live music venue</td>
<td>67%</td>
</tr>
<tr>
<td>Holiday lights festival over the water</td>
<td>73%</td>
<td>Fine dining options</td>
<td>64%</td>
</tr>
<tr>
<td>Concerts and festivals on the waterfront</td>
<td>70%</td>
<td>Coffee shop</td>
<td>64%</td>
</tr>
<tr>
<td>Activities which afford unique views of the waterfront and natural landscape</td>
<td>69%</td>
<td>Retail and boutiques</td>
<td>62%</td>
</tr>
</tbody>
</table>
Q&A
Discussion
1. Building local ambassadors.
Recall, the biggest opportunity for Elizabeth City is building familiarity.

<table>
<thead>
<tr>
<th>DEMOGRAPHIC</th>
<th>PAST VISITORS</th>
<th>PROSPECTIVE VISITORS</th>
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<tr>
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</tr>
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<td>FAMILIARITY</td>
<td>59%</td>
<td>12%</td>
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<td>CONSIDERATION</td>
<td>--</td>
<td>28%</td>
<td>--</td>
</tr>
<tr>
<td>DESIRED BEHAVIOR (REPEAT VISITATION/INTENT TO VISIT)</td>
<td>58%</td>
<td>39%</td>
<td>45%</td>
</tr>
</tbody>
</table>
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**

- **63%**
  - Say friends and family are the most important information source when planning a trip.

### PROSPECTIVE VISITORS

- **44%**
  - Learned about Elizabeth City through “word of mouth”

- **78%**
  - Say friends and family are the most important information source when planning a trip.
1. How do you think residents would describe Elizabeth City as a tourist destination?

2. What can you, the industry, do to better educate residents and build up local ambassadors?

3. What are the biggest barriers to getting residents on board?
Collaboratively addressing product needs.
RATIONAL VACATION ATTRIBUTES OPPORTUNITY MAP

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)
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?

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<td>69%</td>
<td>Retail and boutiques</td>
<td>62%</td>
</tr>
</tbody>
</table>
1. To what degree are the opportunities around product perception-based or actual product voids?

2. Which product development opportunities should be the primary focus?

3. What are barriers to product development?

4. How can the industry better partner together to overcome these barriers?
Top three words to describe Elizabeth City
Top three words to describe Elizabeth City

- Waterfront
- Quaint
- Rural
Top three words to describe Elizabeth City