



Visit Elizabeth City Industry Workshop

January 31, 2020

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:

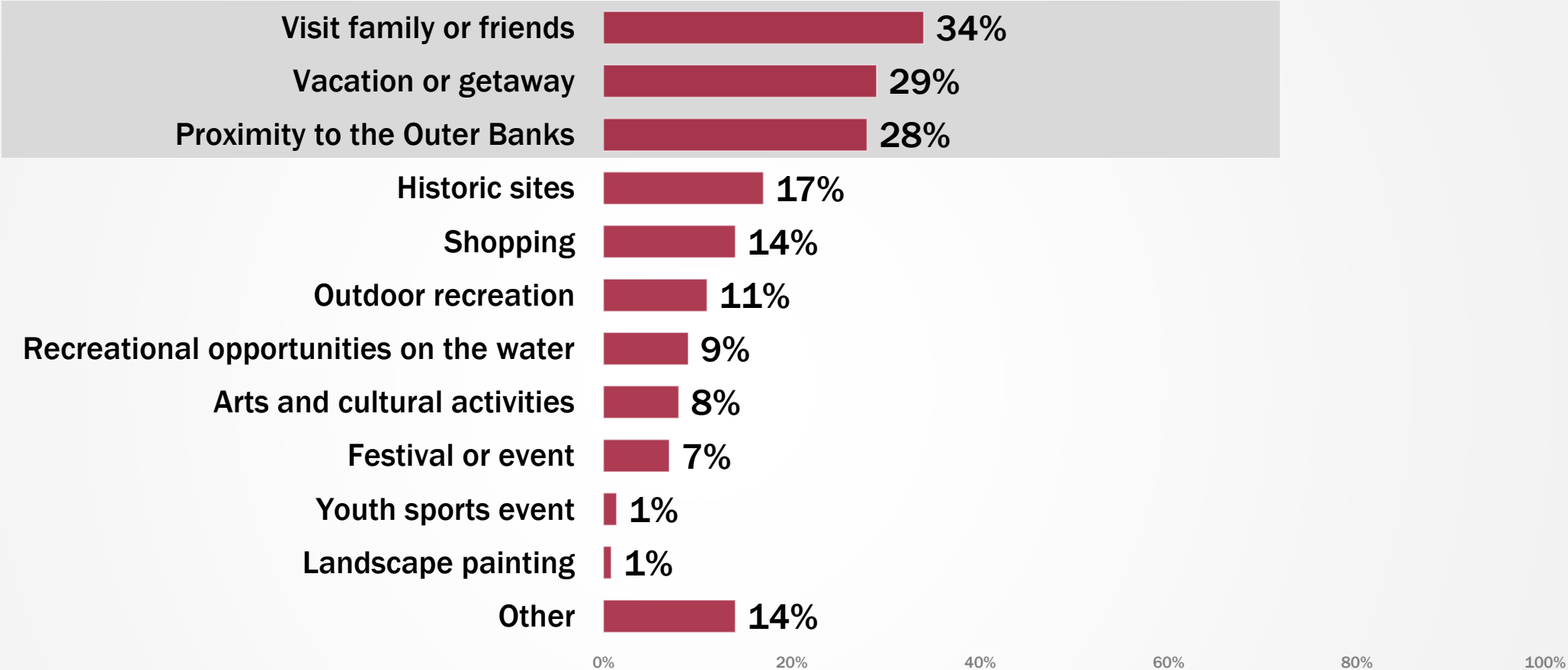
- Business or meeting (non-Coast Guard related)
- Coast Guard related work
- Potential relocation
- College tour or reunion visit

**V.
Prospective
Visitors Survey**

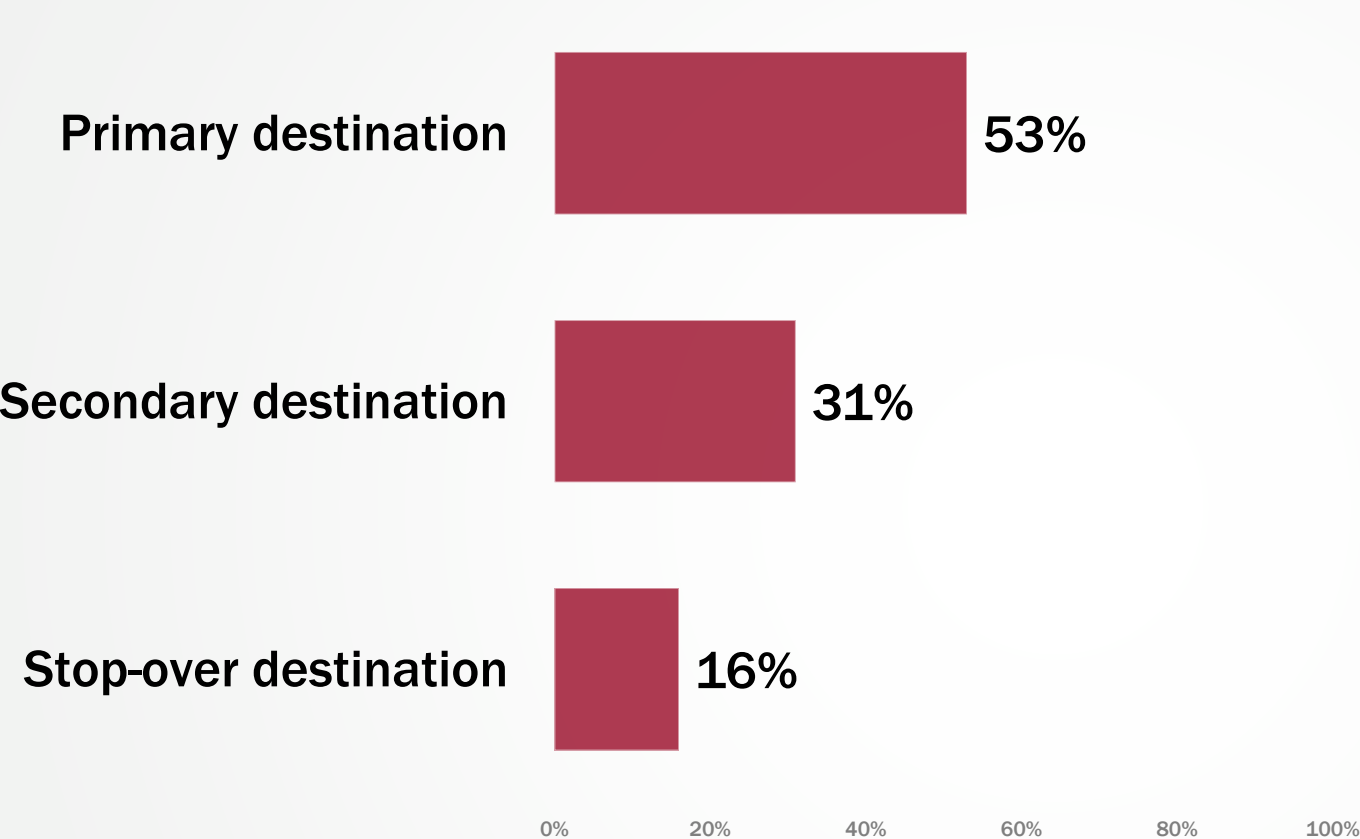
1

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

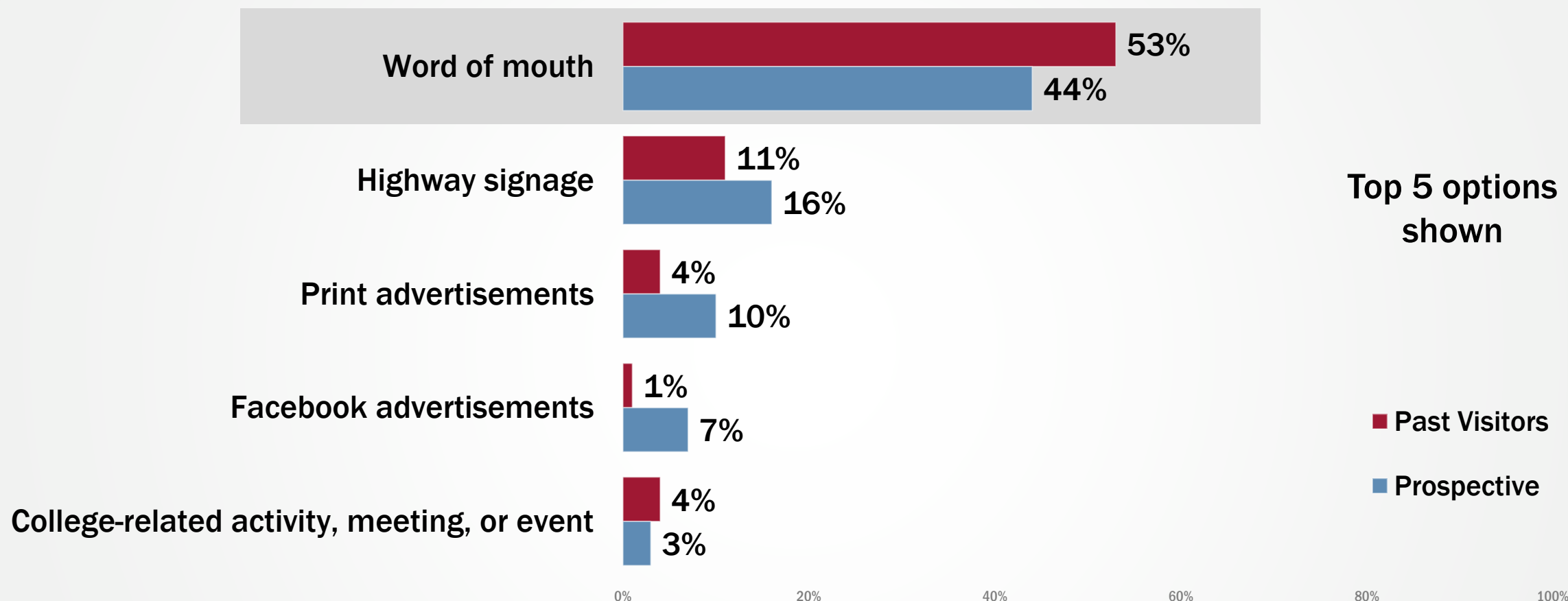


For more than half of Past Visitor respondents, Elizabeth City was their primary destination

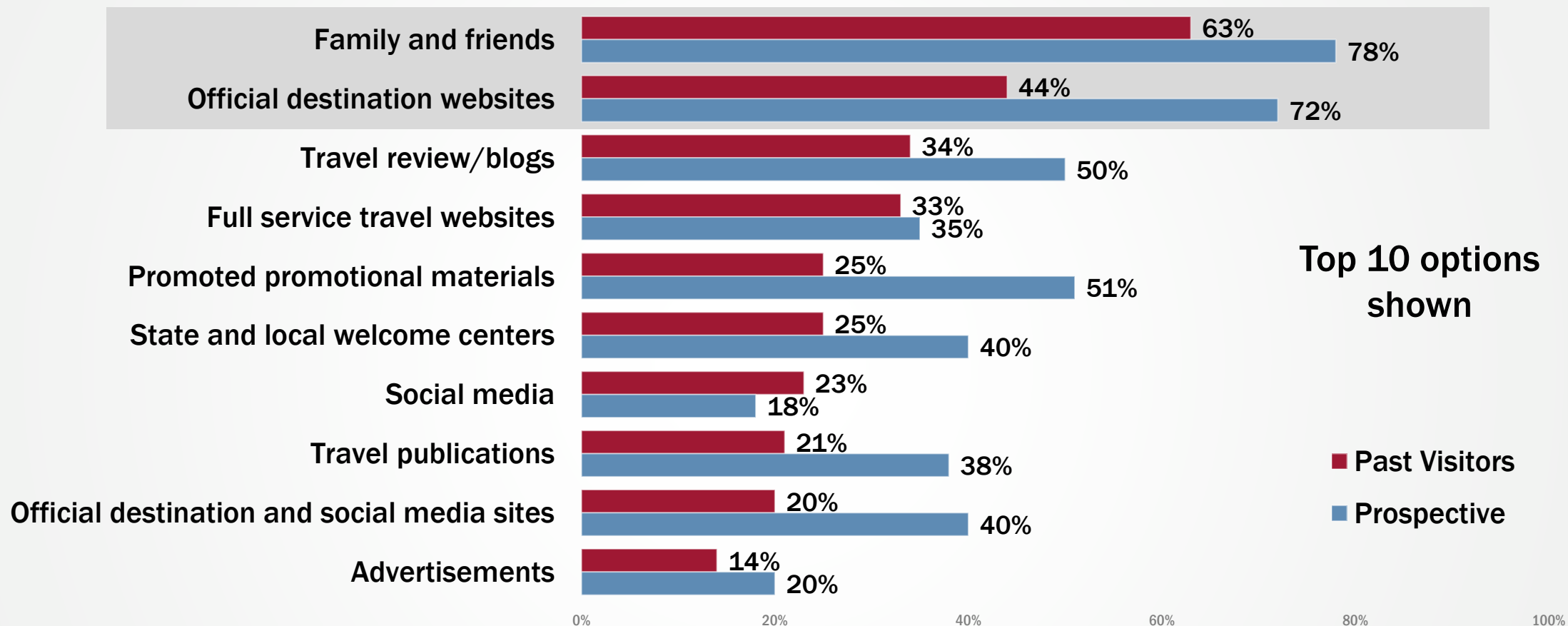


19% of past visitors were on their way to/from the Outer Banks.

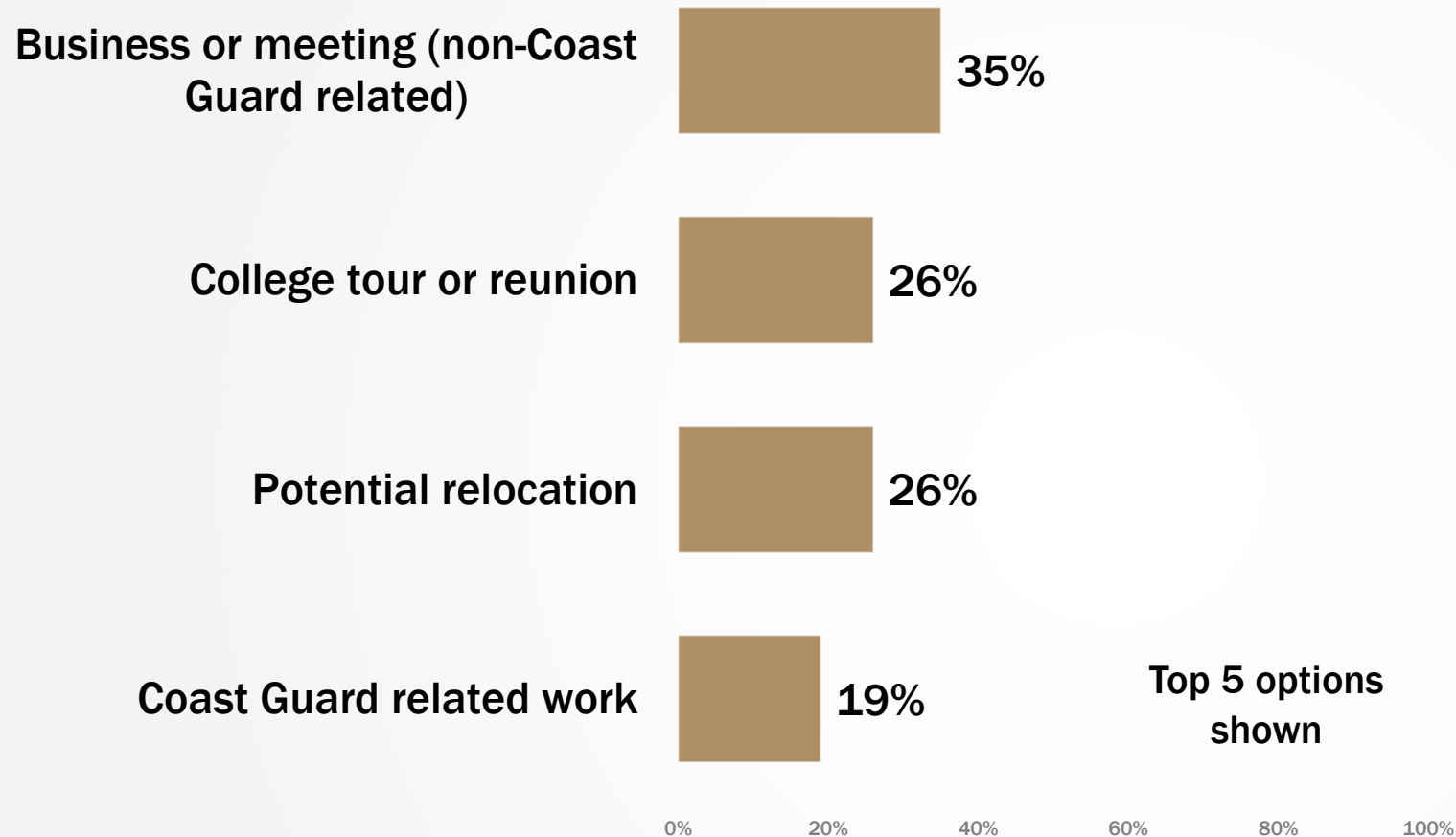
Most Past and Prospective Visitor respondents first heard about Elizabeth City through WORD OF MOUTH followed distantly by highway signage



Family and friends followed by official destination websites are the most important information sources



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



EXPLORED ELIZABETH CITY

48%

AVERAGE NIGHTS IN
ELIZABETH CITY:

2.8

2

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



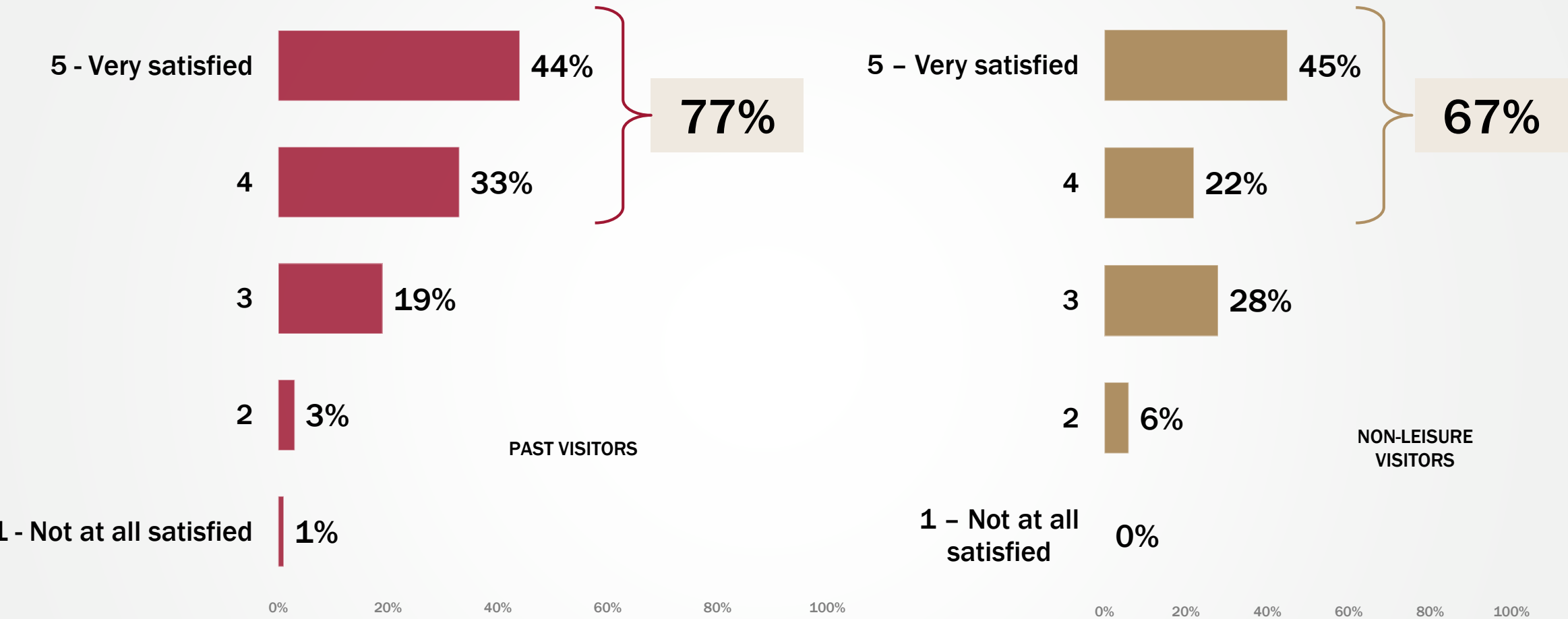
NON-LEISURE VISITORS



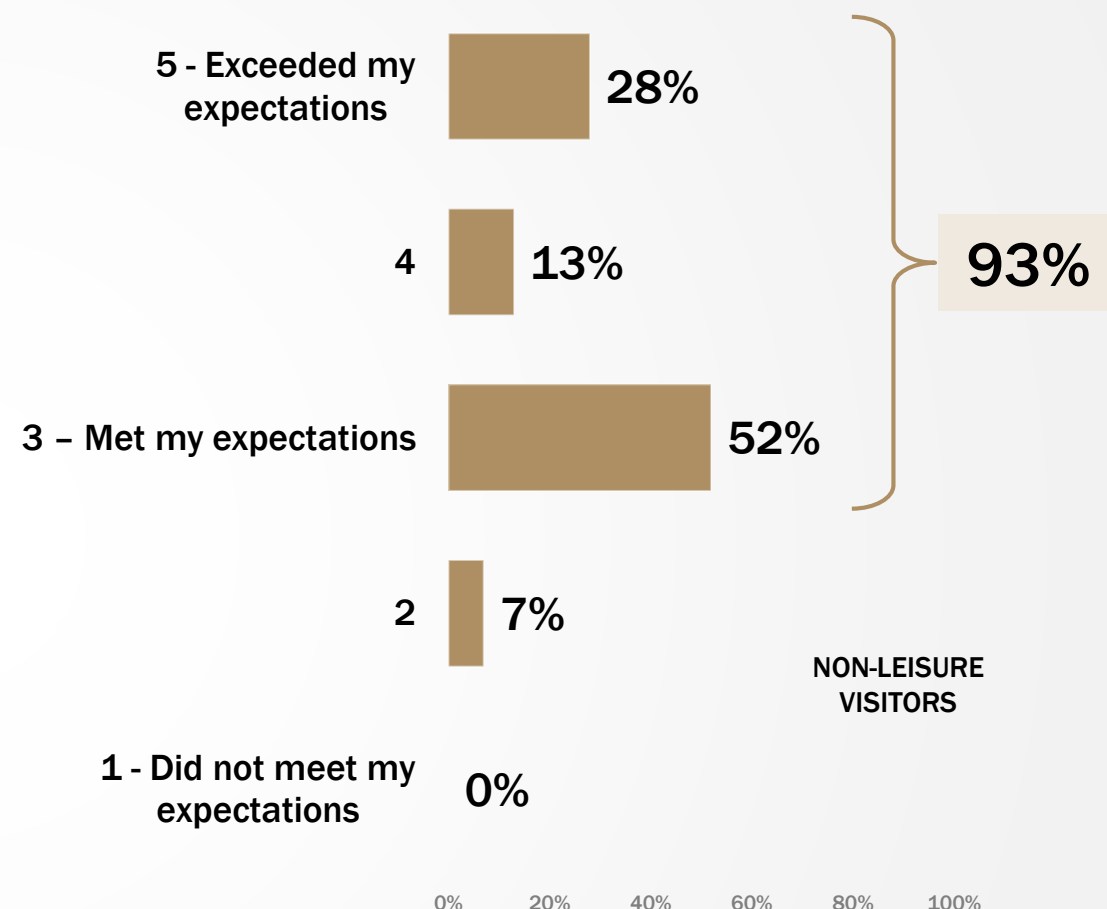
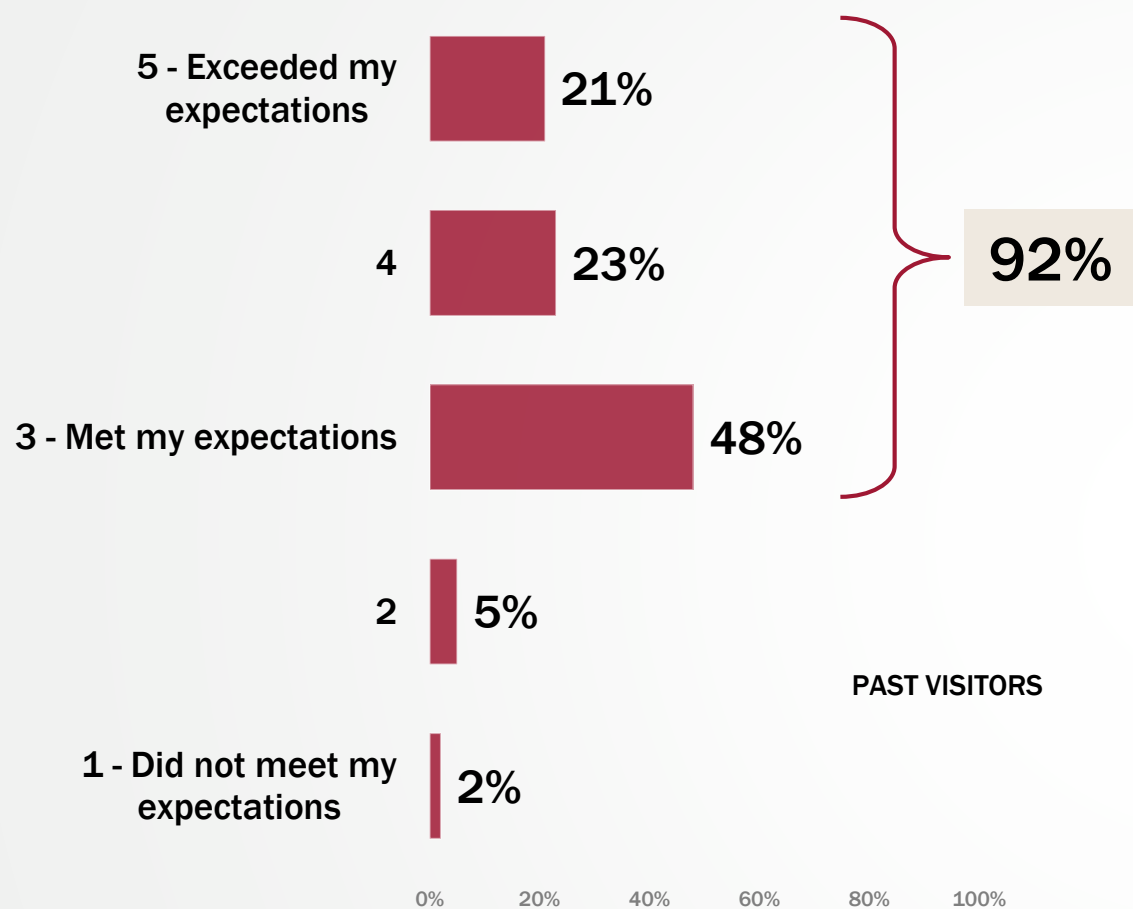
PROSPECTIVE VISITORS



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



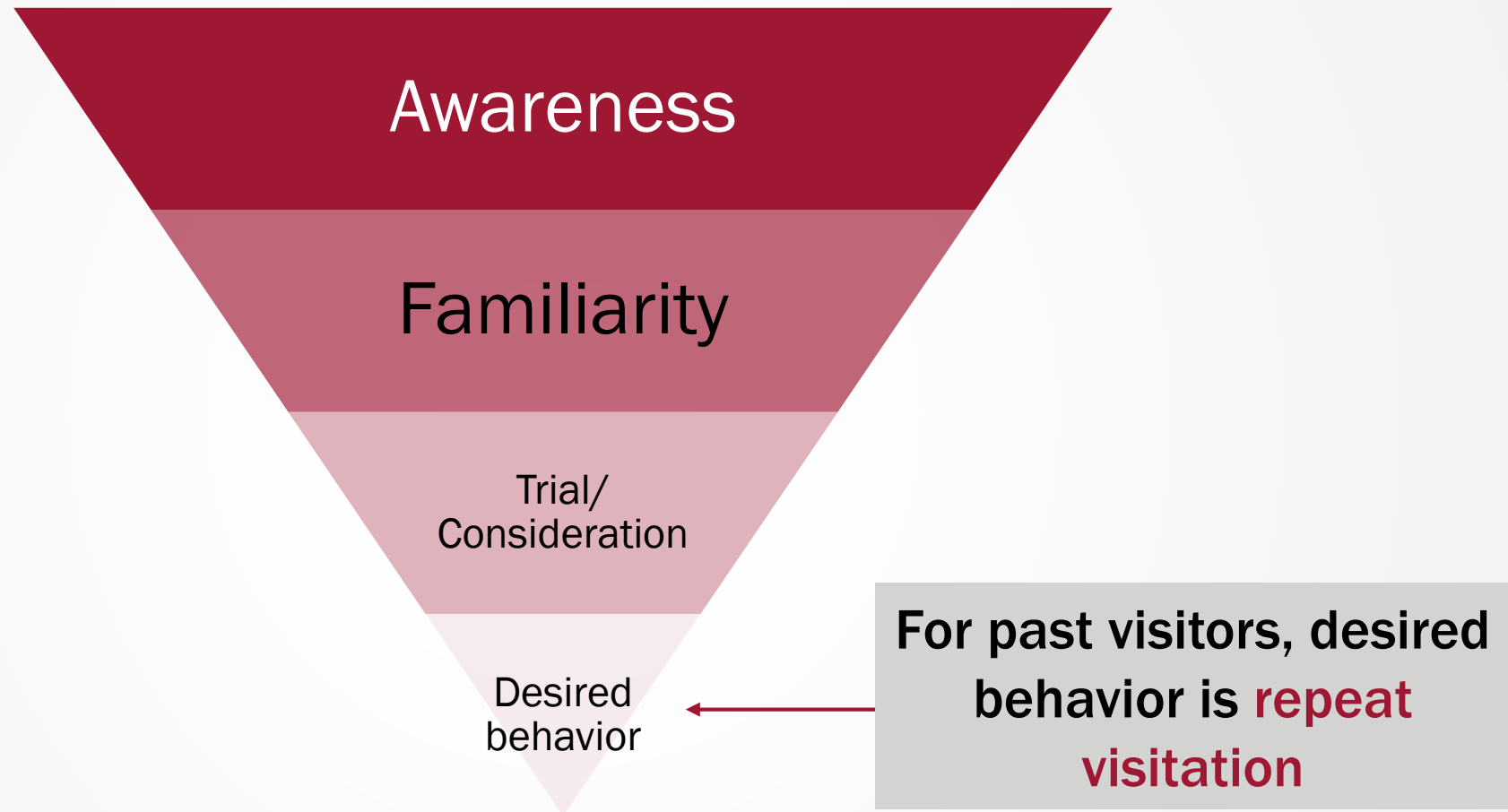
Nine in 10 Past Visitor and Non-Leisure respondents say their experience visiting Elizabeth City met or exceeded their expectations



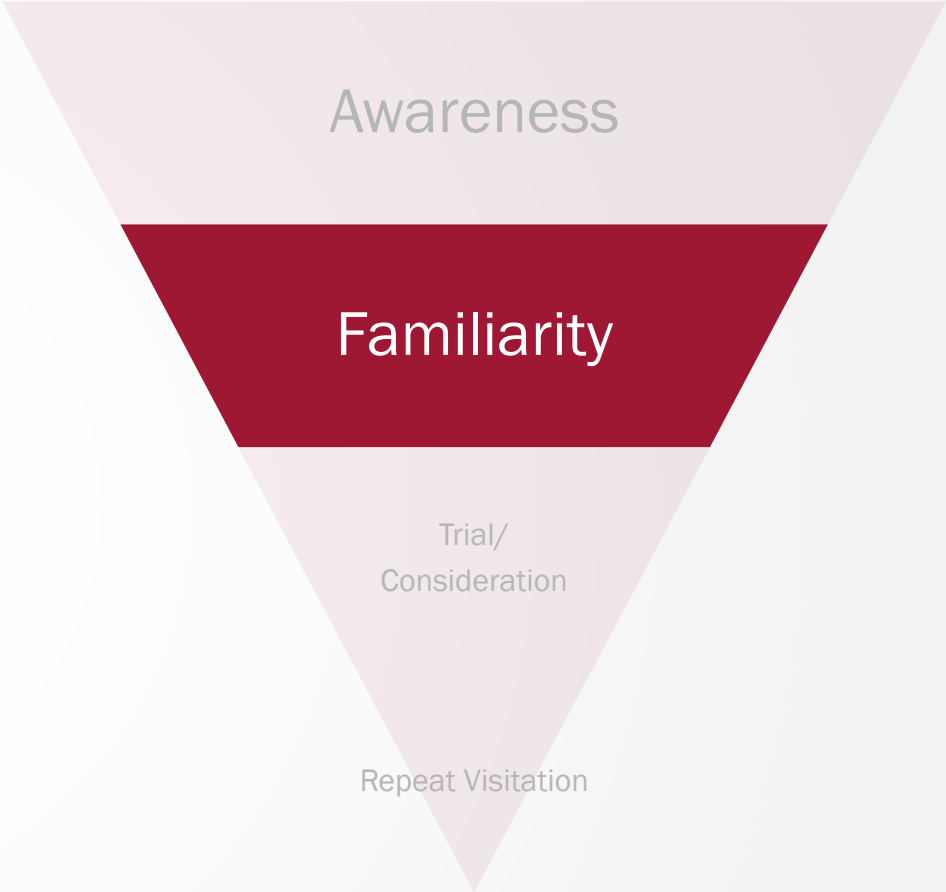
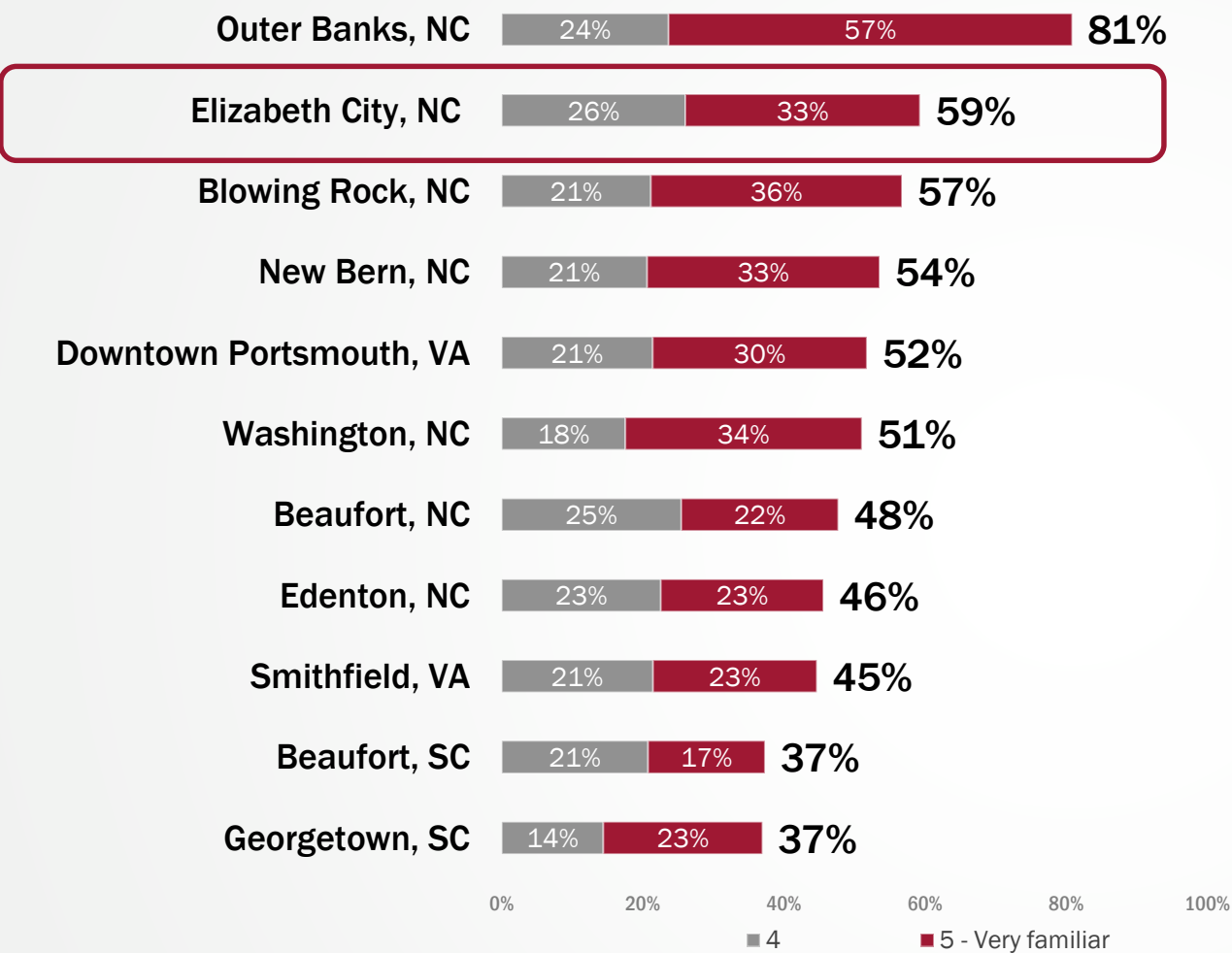
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Elizabeth City's biggest opportunity is to build familiarity. Those who are more familiar give higher ratings across the board.

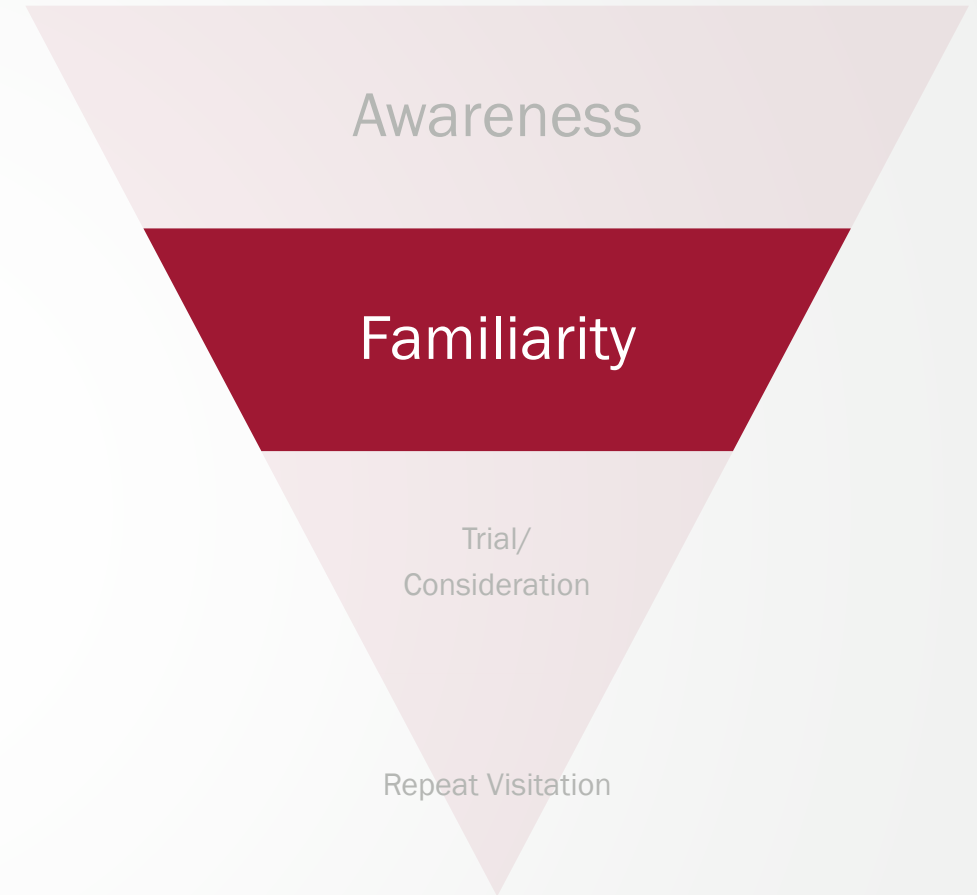
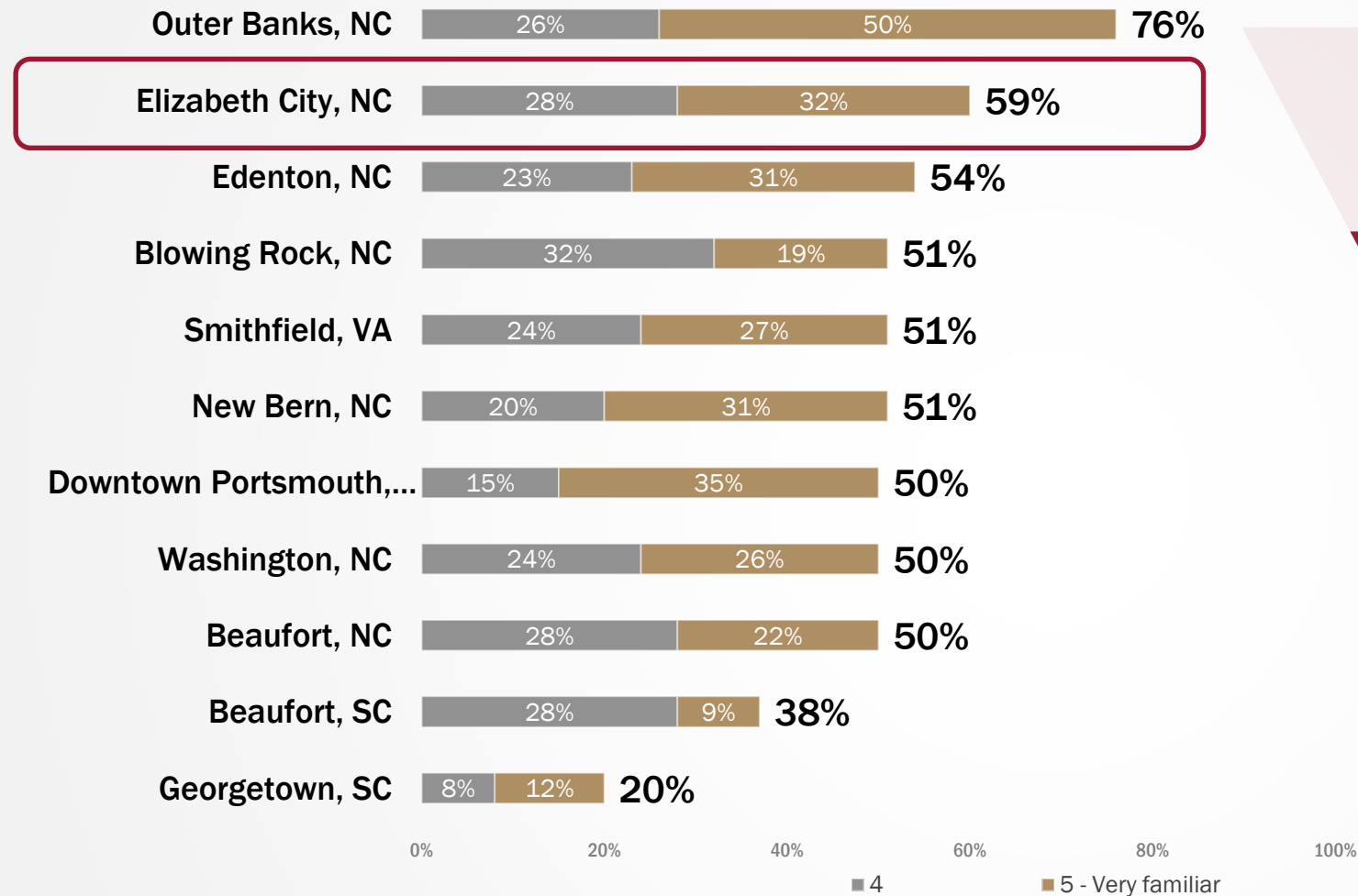
Traditional marketing funnel



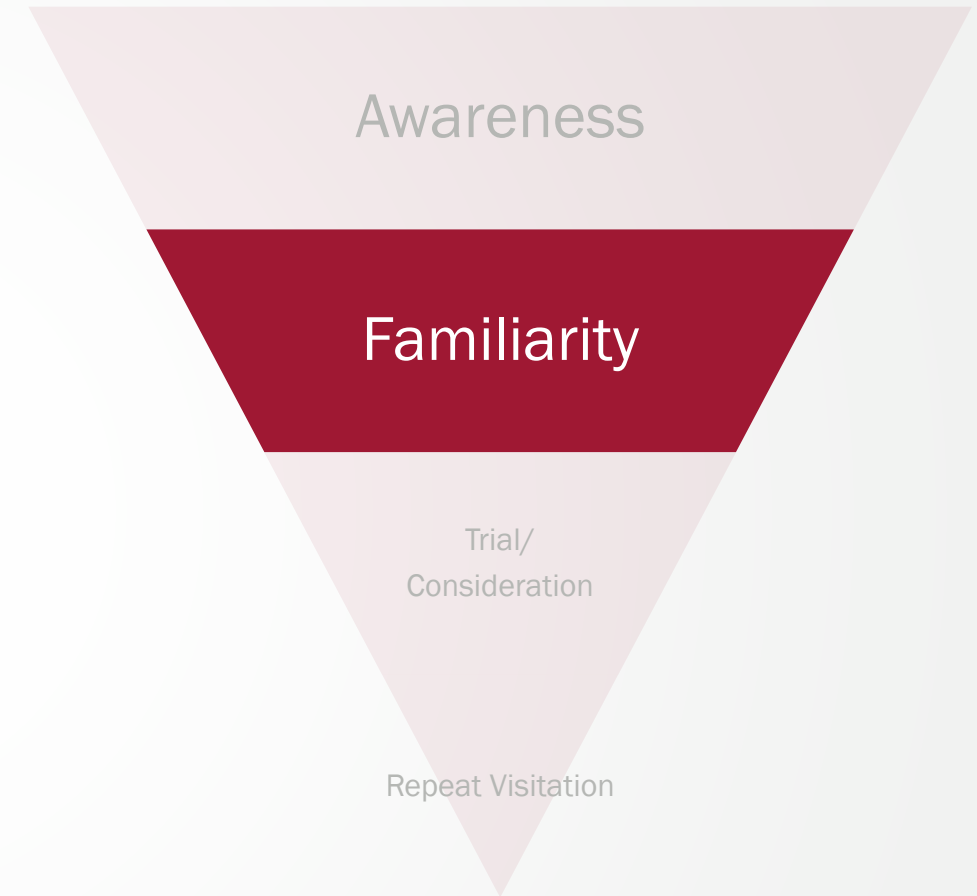
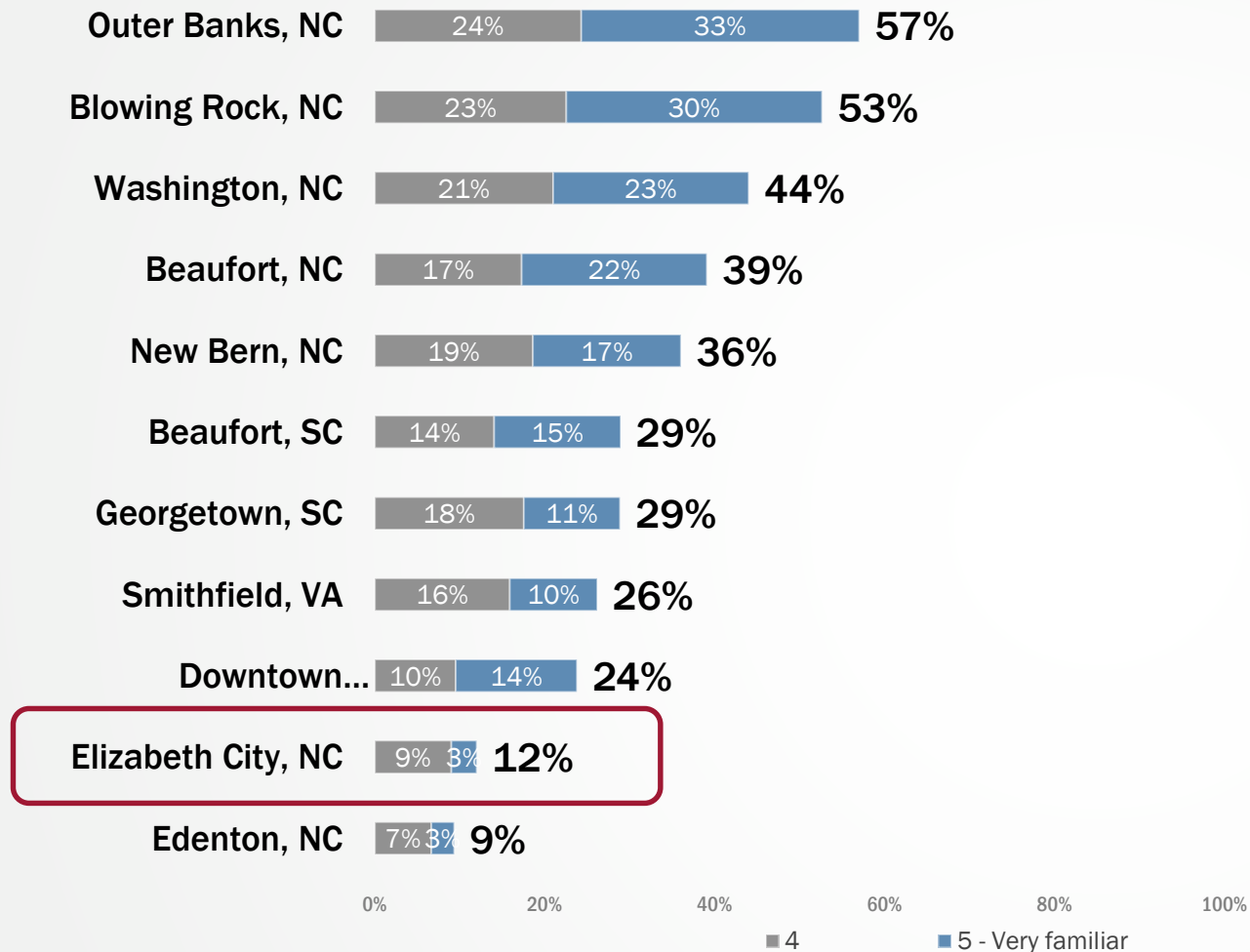
Three in five Past Visitor respondents say they are familiar with Elizabeth City



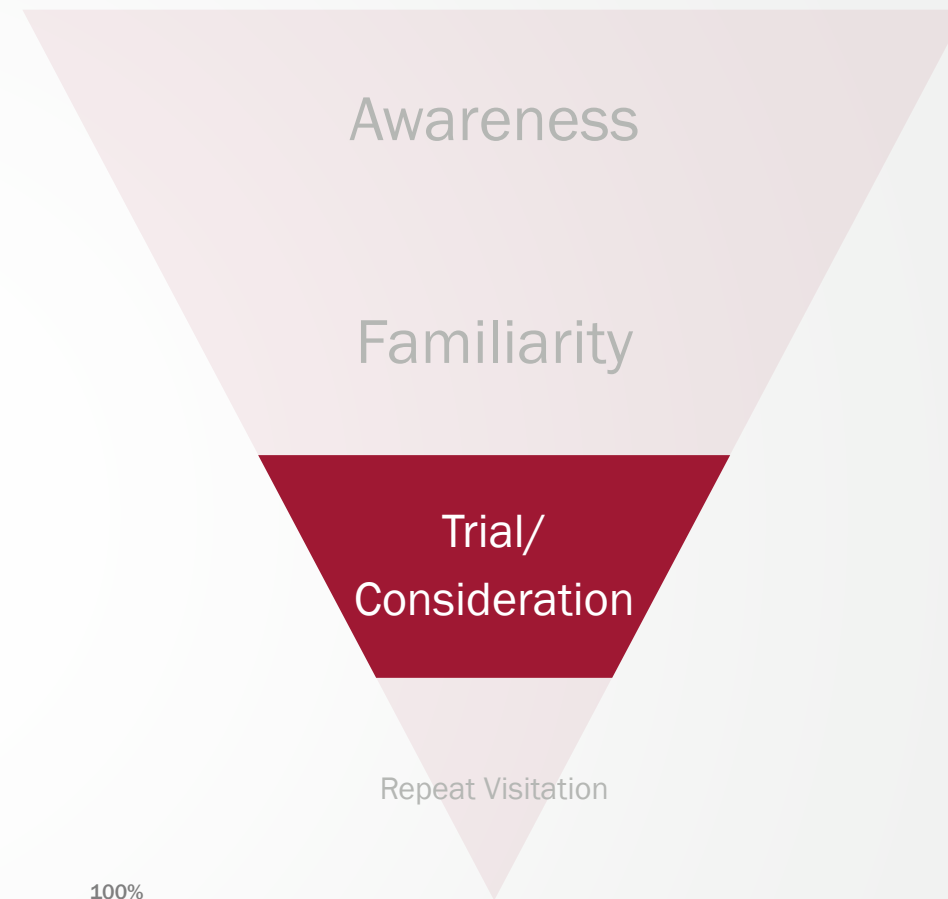
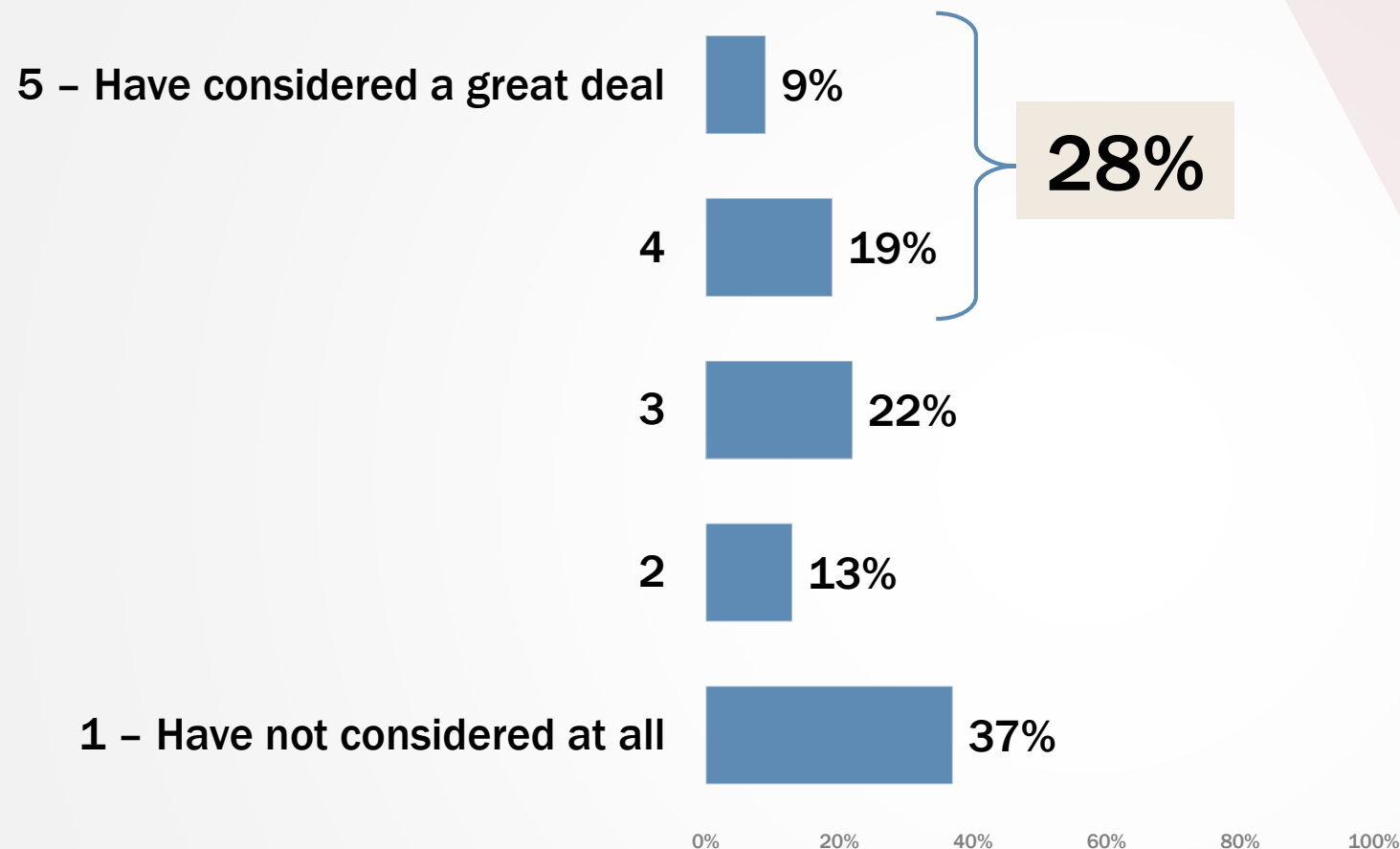
Non-Leisure Visitor respondents are most **familiar** with the Outer Banks, and about three in five feel familiar with Elizabeth City



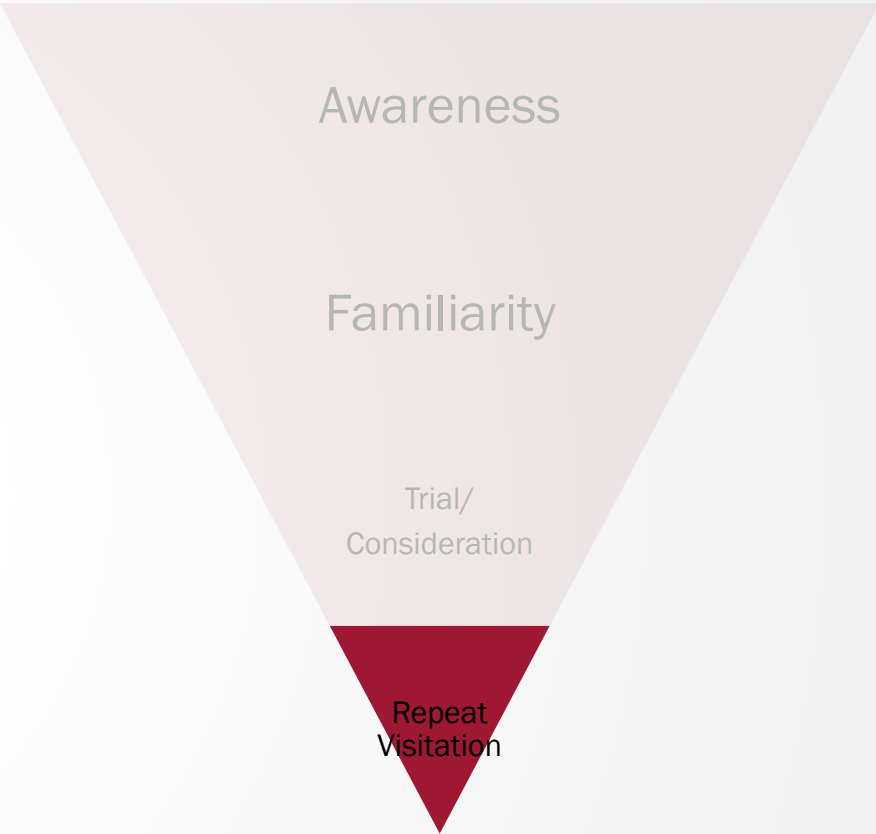
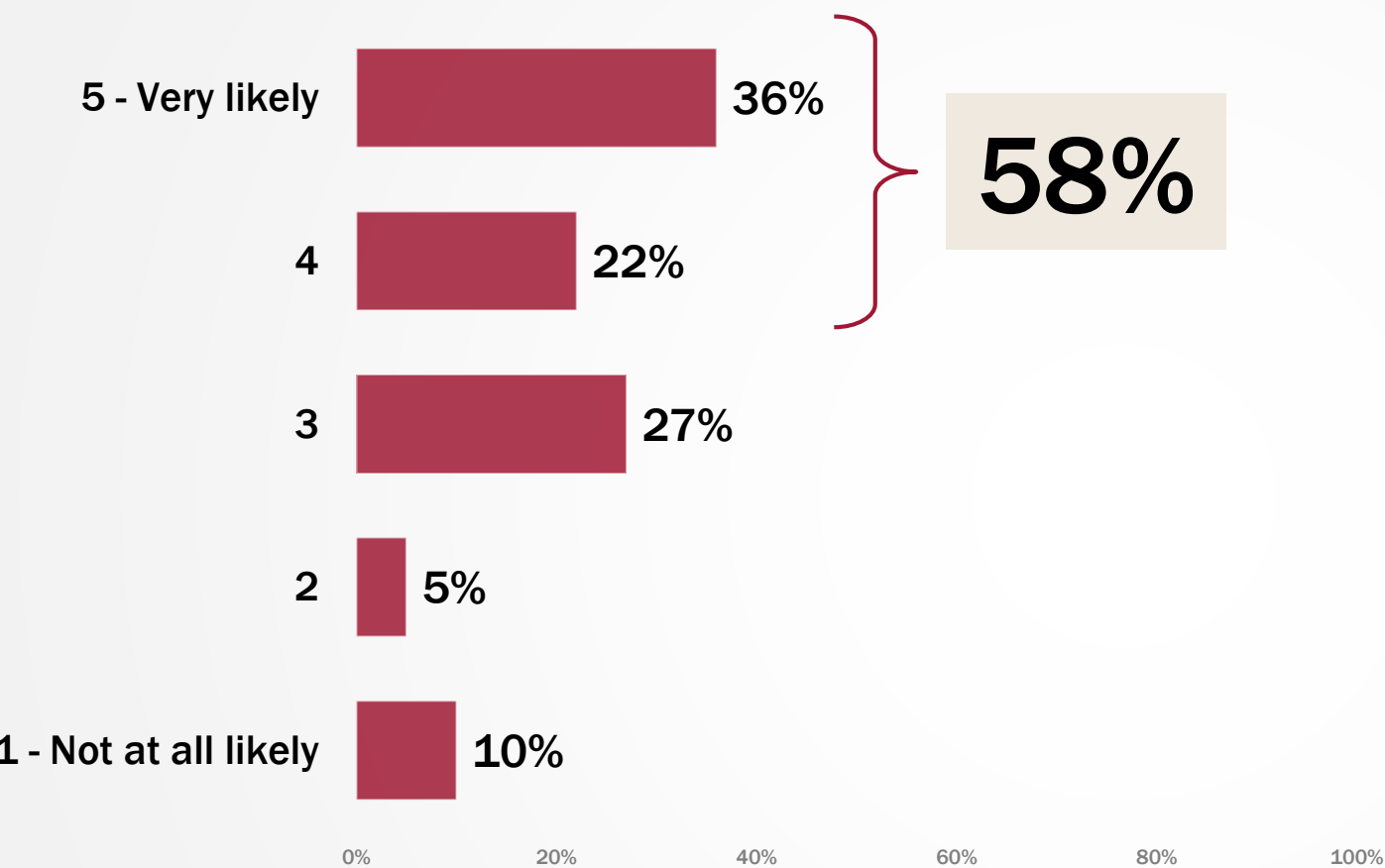
Prospective Visitors are most **familiar** with the Outer Banks, while only 12 percent feel familiar with Elizabeth City



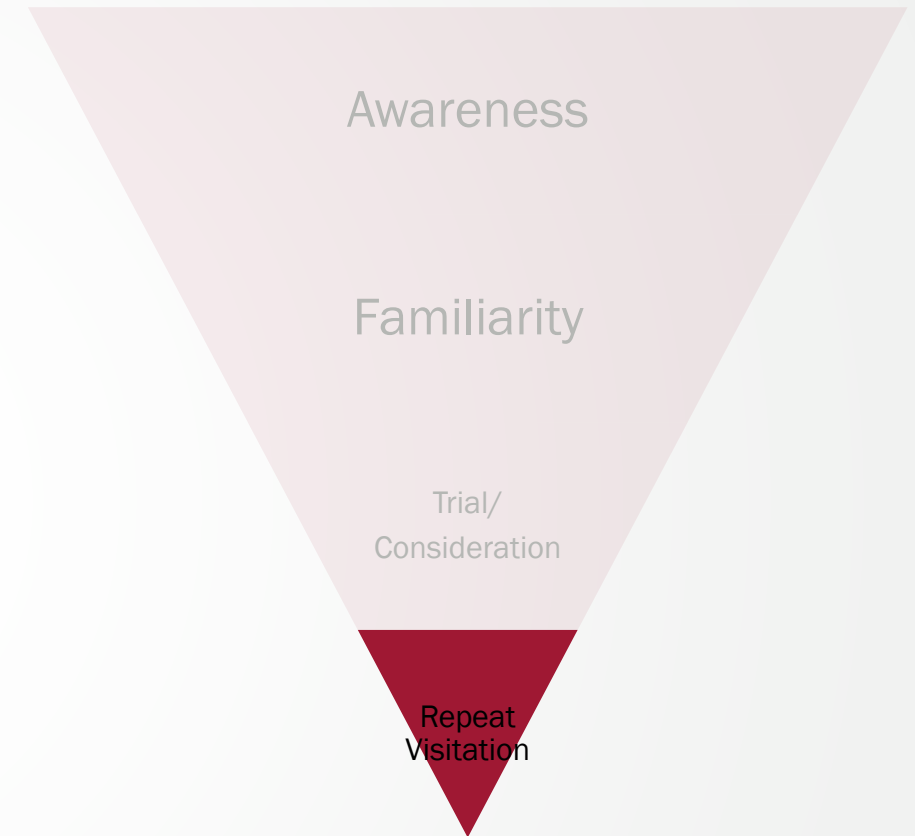
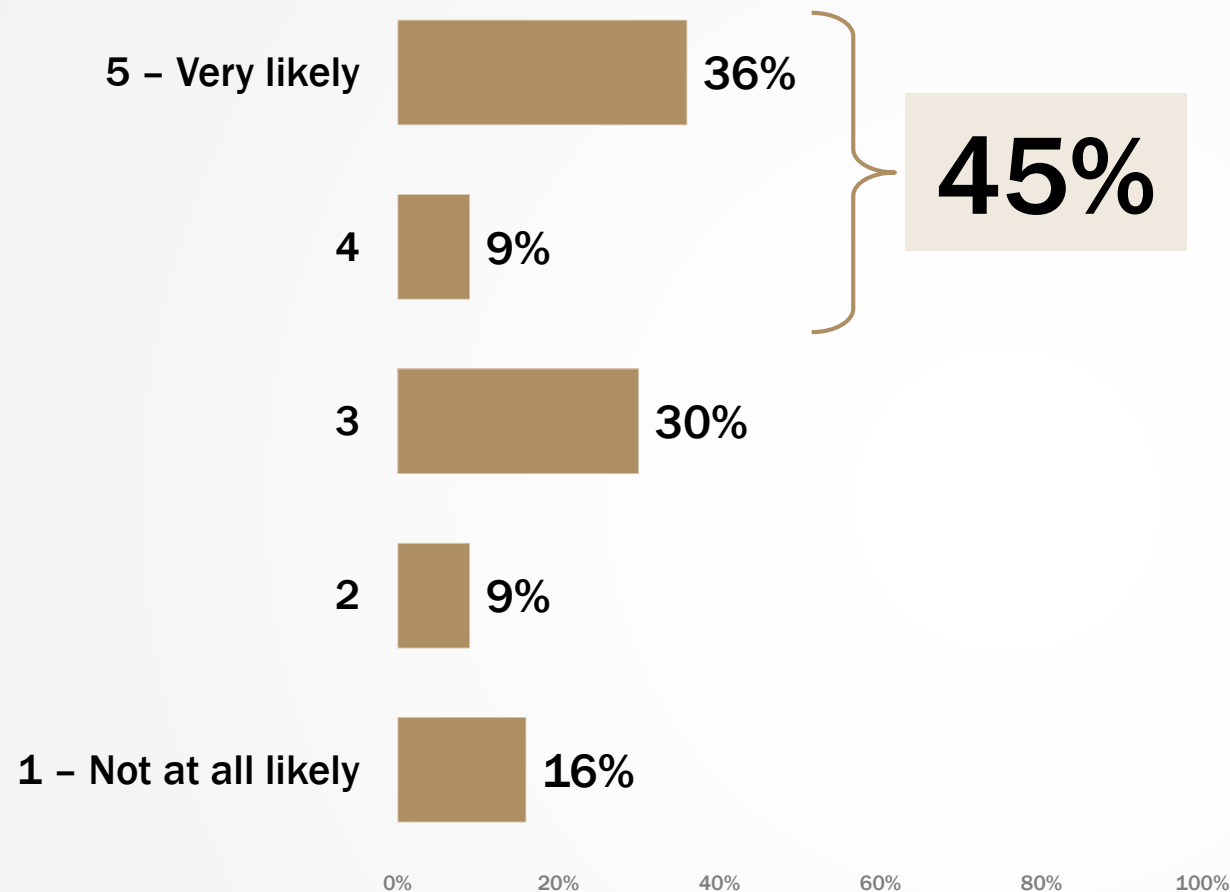
Roughly a quarter of Prospective Visitor respondents have considered a visit to Elizabeth City in the past



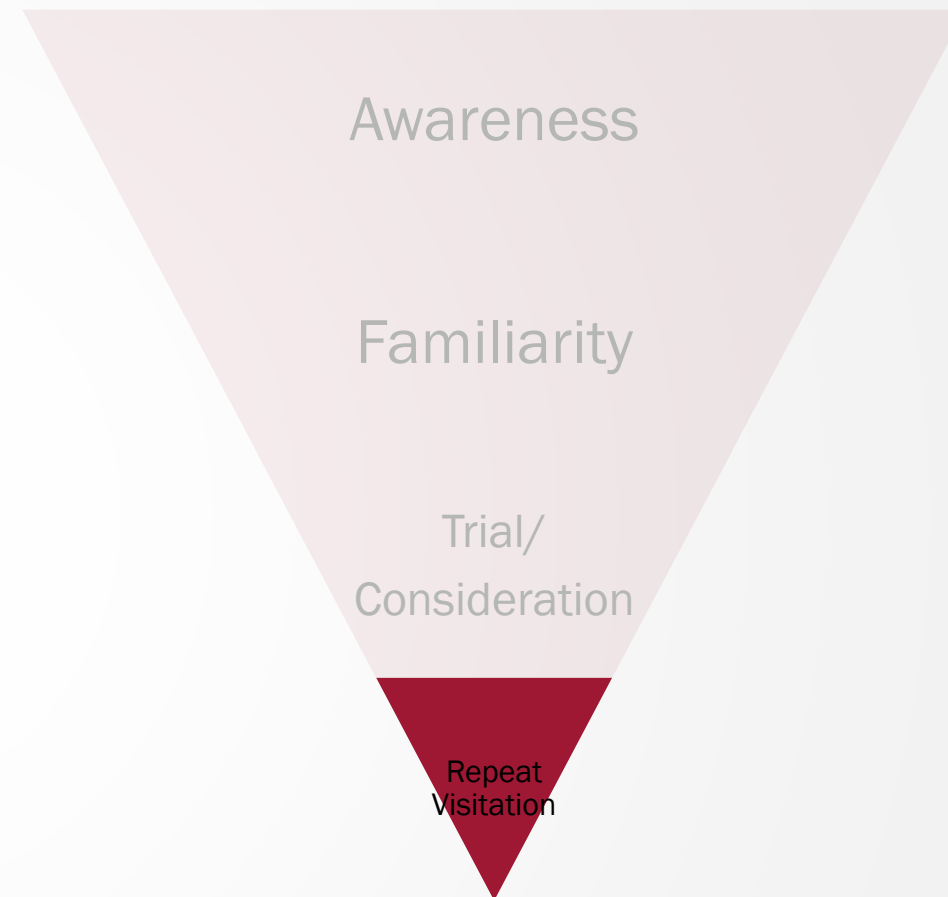
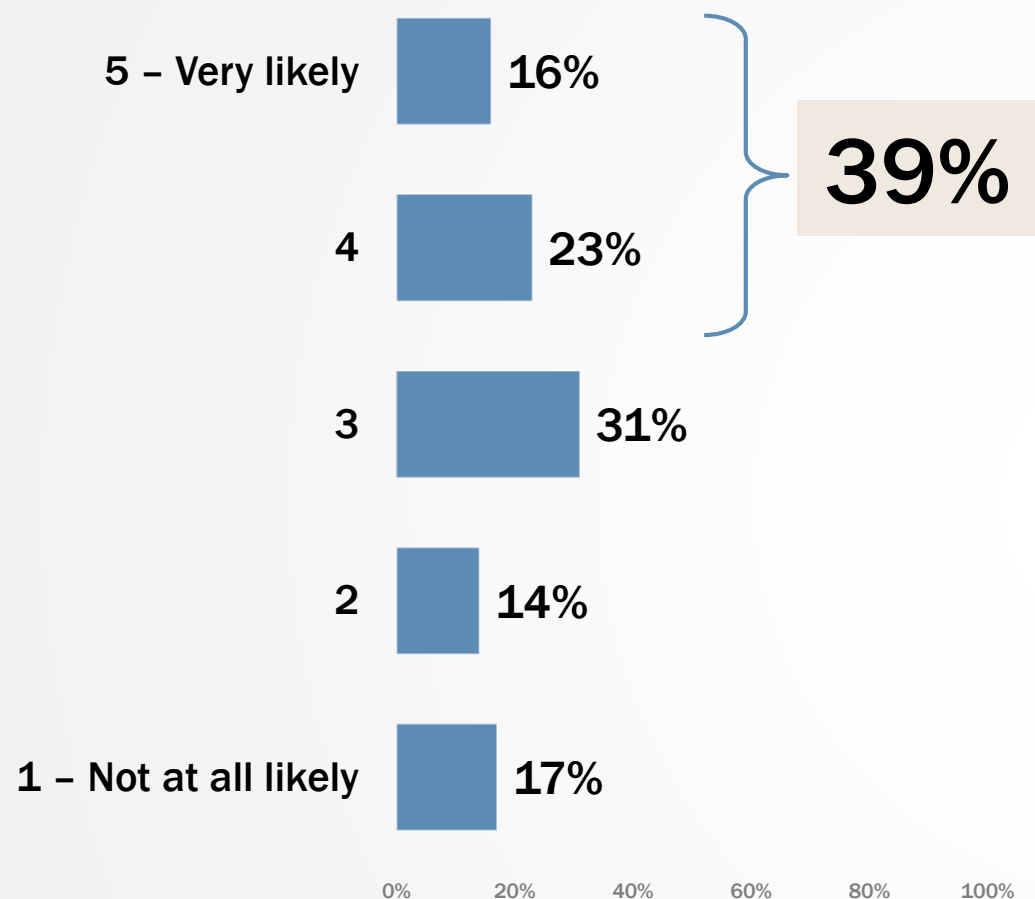
Nearly three in five Past Visitor respondents say they are likely to make a return trip to Elizabeth City



Nearly half of Non-Leisure Visitor respondents plan to make a return trip to Elizabeth City in the future



Nearly two in five Prospective Visitor respondents say they are likely to visit Elizabeth City for a leisure trip in the future

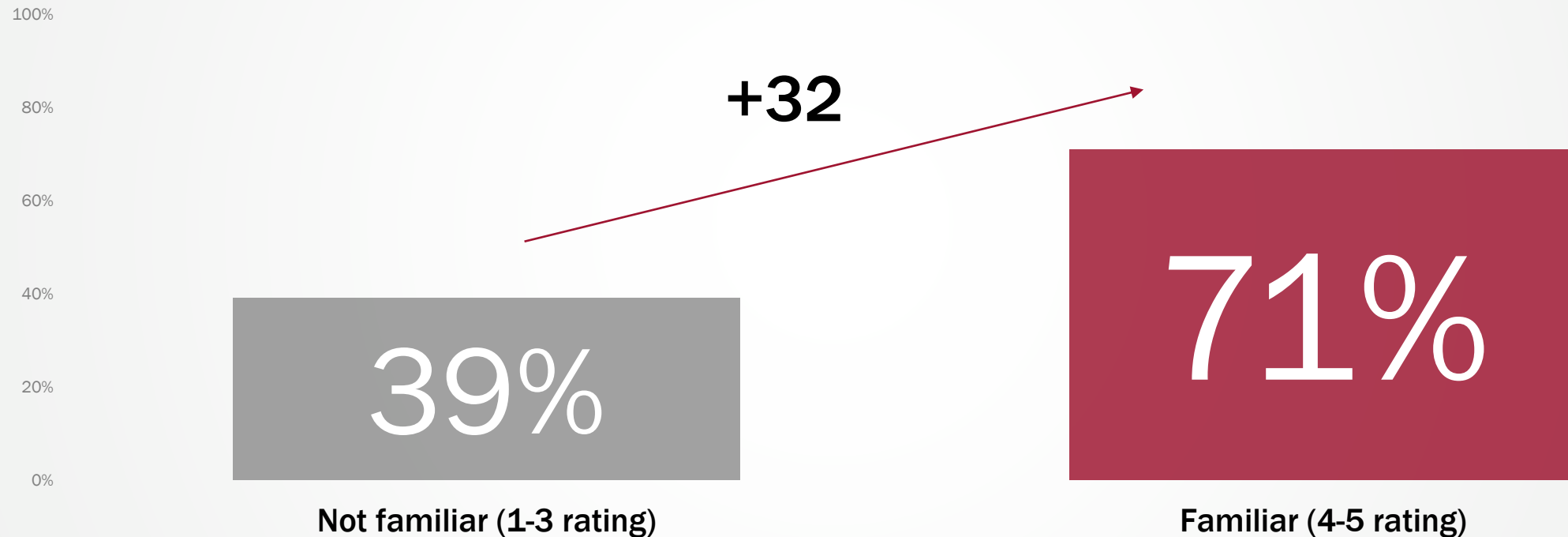


The biggest opportunity for Elizabeth City is building familiarity among all types of visitors

DEMOGRAPHIC	PAST VISITORS	PROSPECTIVE VISITORS	NON-LEISURE VISITORS
AWARENESS	100%	100%	100%
FAMILIARITY	59%	12%	59%
CONSIDERATION	--	28%	--
DESIRED BEHAVIOR (REPEAT VISITION/INTENT TO VISIT)	58%	39%	45%

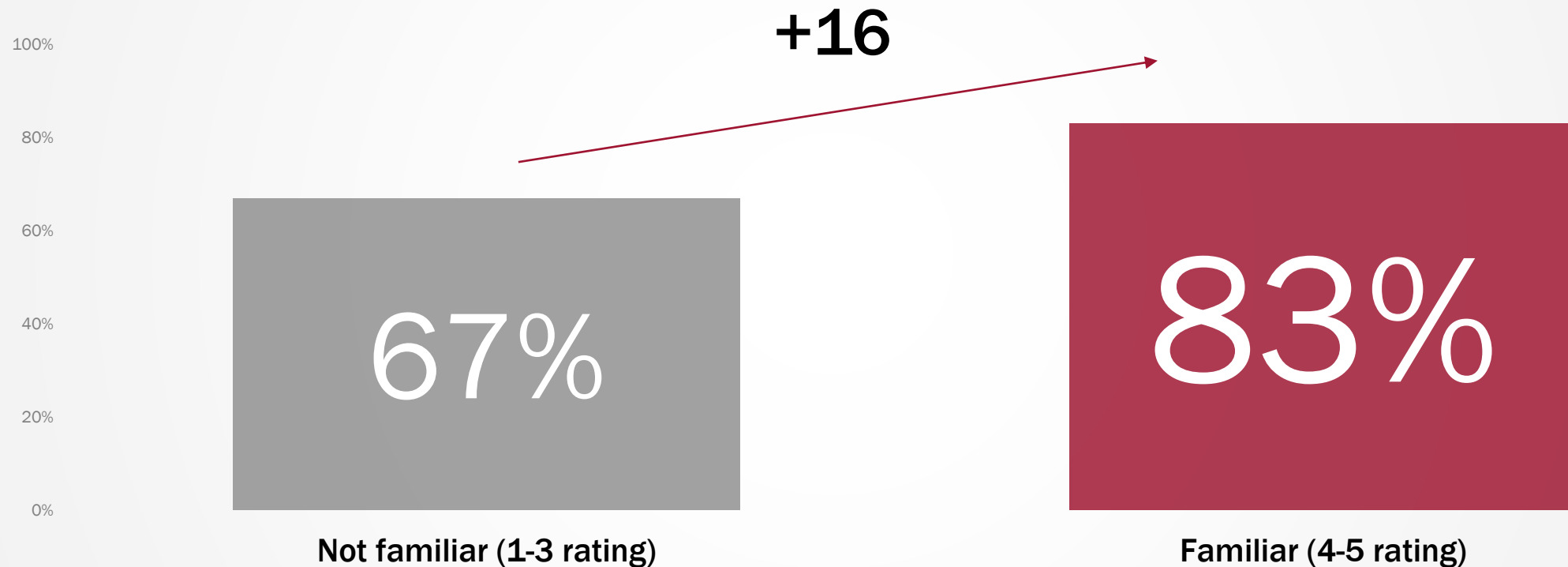
Being familiar with Elizabeth City “lifts” overall likeliness to visit again

LIKELY TO RETURN TO ELIZABETH CITY

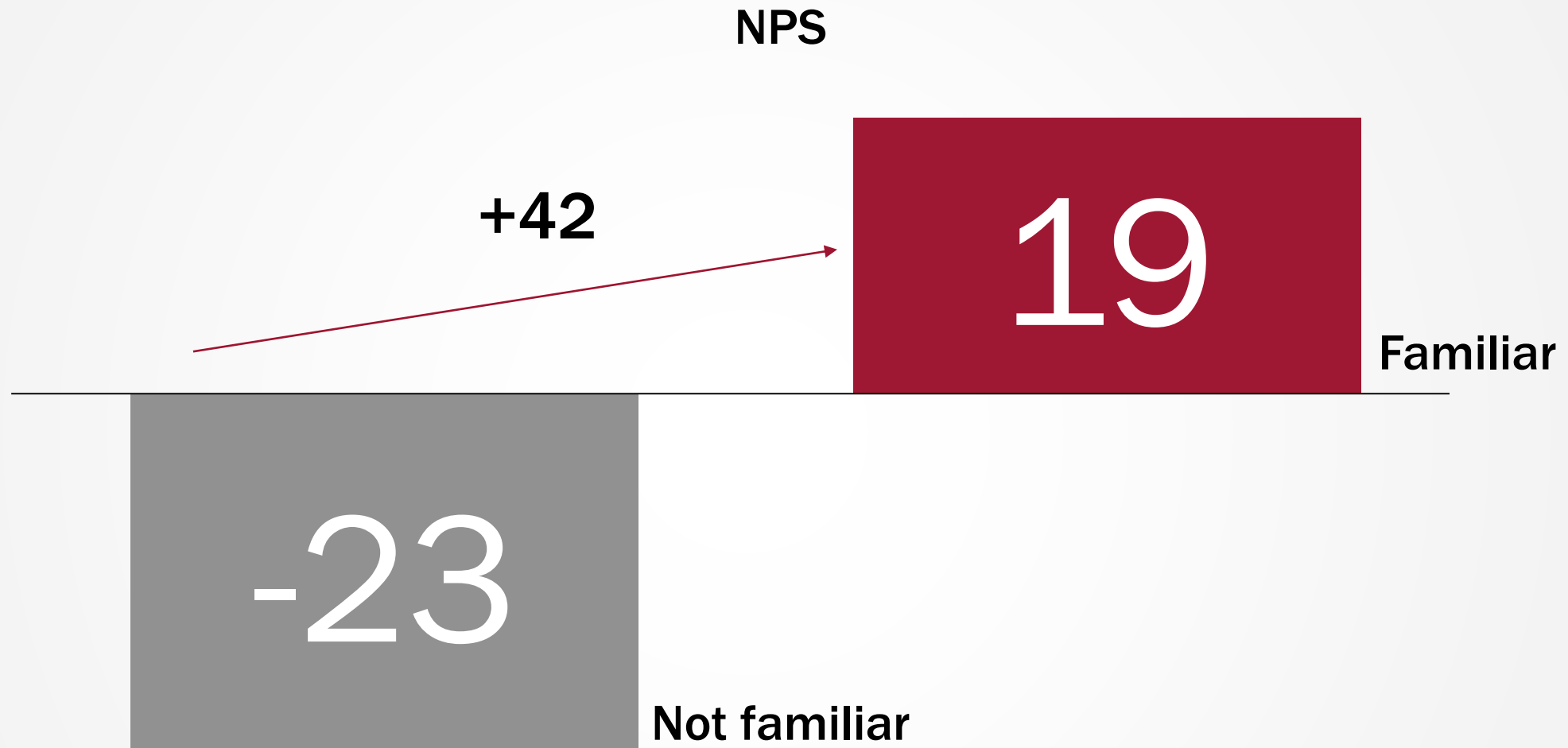


Being familiar with Elizabeth City “lifts” overall satisfaction with their visit

SATISFIED WITH TRIP VISIT TO ELIZABETH CITY



And, being familiar with Elizabeth City “lifts” overall likeliness to recommend a trip to Elizabeth City



4

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

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

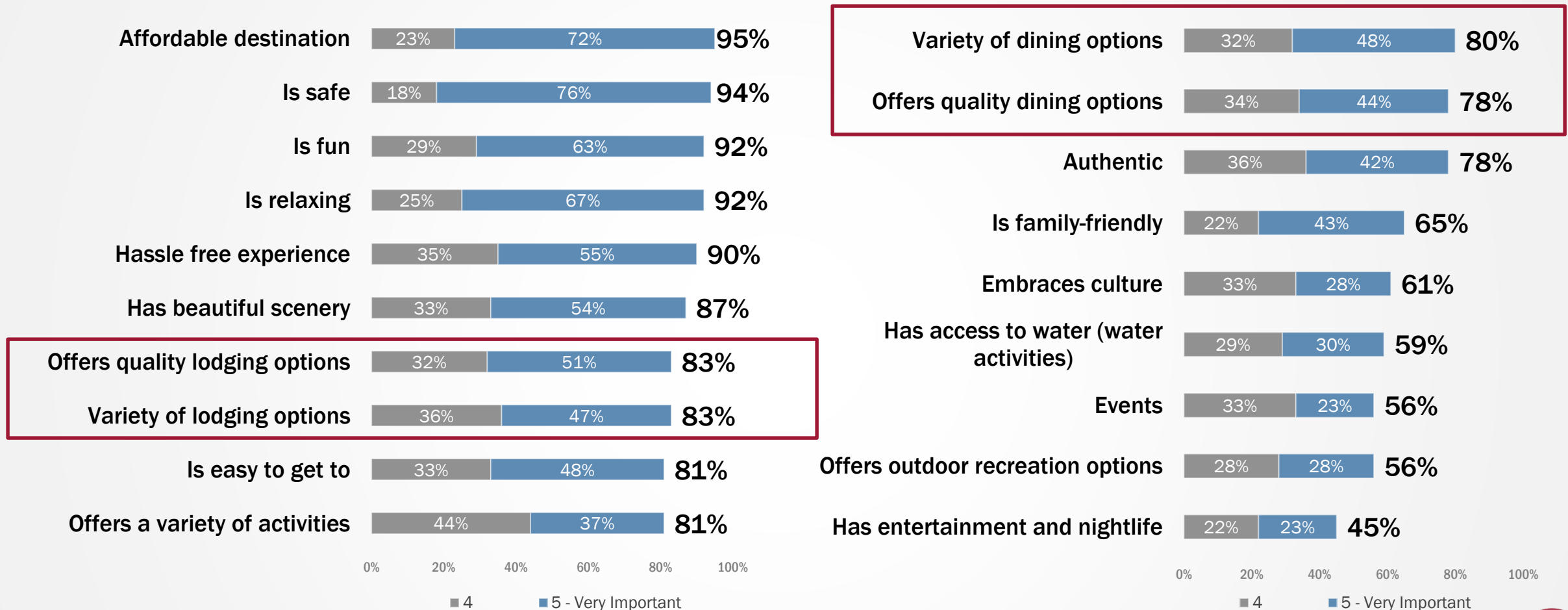
- Embraces culture
- Offers outdoor recreation options
- Events
- Has entertainment and nightlife

ALREADY WORKING

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

PERFORMANCE

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



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%



Q&A

Discussion

1.

Building local
ambassadors.

Recall, the biggest opportunity for Elizabeth City is building familiarity

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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%

-
- 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?**

2.

Collaboratively
addressing product
needs.

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
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- Is safe
- Has beautiful scenery
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VALUE-ADD SATISFIERS

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PERFORMANCE

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-
- 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

PAST
VISITORS



Top three words to describe Elizabeth City

NON-LEISURE
VISITORS



Top three words to describe Elizabeth City

PROSPECTIVE
VISITORS

