



**WASHINGTON TOURISM
DEVELOPMENT AUTHORITY
COMPREHENSIVE RESEARCH STUDY &
STRATEGIC MARKETING PLAN**

Executive Summary



Prepared By:
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Mooresville, North Carolina
December, 2008

Adopted Unanimously by the Washington Tourism Development Authority Board of Directors, January 21, 2009.

Study Objective:

The objective of this study was to conduct comprehensive research and develop a strategic marketing plan to effectively position and market Washington, North Carolina as a travel and tourism destination of choice. The Washington Tourism Development Authority (WTDA) retained Randall Travel Marketing, Inc. (RTM) of Mooresville, North Carolina to conduct this study.

Study Methodology:

Research was conducted in Washington, North Carolina during the four month period of July 2008 through October 2008. The following methodology steps were implemented:

1. Initial Meeting and Materials Gathering:

Initial meetings were conducted between the Washington Tourism Development Authority and RTM professionals in order to review study methodology, deliverables, questionnaires, etc.

2. Reconnaissance and Mystery Shopping:

A professional reconnaissance team visited Washington July 23 through 27, 2008 and September 7 through 10, 2008. The region was fully evaluated from the perspective of the tourist. The team mystery shopped visitor information centers, attractions, hotels, restaurants, retail stores and amenities. Other elements evaluated included signage, gateways, wayfinding and front line hospitality training.

3. Performance Audit:

RTM conducted an in-depth performance analysis of the WTDA. This included the organization's governance, mission statement, funding and budget allocation, staffing, results measures and program performance.

4. Lodging Property Fax Survey:

A confidential survey was sent to every lodging property in Washington, North Carolina. Four (4) properties representing (272 rooms) responded to this survey. The response rate of 70.5% is reliable. Additionally, a comparison of the data submitted to RTM and the data submitted to Smith Travel Research (STR) revealed directly comparable statistics.

5. Visitor Intercept Interviews:

Intercept interview participants were chosen to match the overall lodging mix as reported by the lodging properties in Washington. The interviews were conducted during two periods including July 24 through July 27 and October 9 through October 14, 2008. Interviews were conducted at various lodging properties, attractions and events. One hundred one (101) intercept interviews were completed including:

- o (29) Visiting friends & relatives
- o (27) Leisure
- o (27) Business
- o (18) Pass through

A two-page questionnaire was written by RTM and approved by the WTDA. The interviews were conducted by RTM staff. An incentive of a drawing for a free weekend visit to Washington, North Carolina was offered to be selected from those that participated in the survey.

6. Attraction Manger Survey:

A survey was sent to seven (7) attractions in Washington. Four (4) attractions participated. A one page questionnaire was written by RTM and approved by the WTDA.

7. State, Regional and National Data:

Travel research data from the State of North Carolina was obtained and analyzed as part of the study. Regional and national travel databases were also studied.

8. Marketing Materials Evaluation:

Marketing materials including brochures and advertising were obtained from the WTDA. Materials were evaluated based on research findings and the marketing experience of the RTM team.

9. Final Report and Recommendations:

Based on the research findings, a comprehensive report was written and presented to the Washington Tourism Development Authority.

Summary of Washington Lodging Study

- Washington has approximately 386 lodging rooms.
- In closely examining Washington, we find that occupancy has fluctuated from year-to-year over the last six years. Nationally the trend has been steady growth during this same time period. Therefore, Washington needs to carefully evaluate where to spend their money and time to increase lodging revenues in the future.
- All seven lodging properties in Washington are limited service and only one has meeting space.
- Individual business travel accounts for the highest lodging occupancy at 49.5%.
- Leisure travelers represent approximately 21% of occupancy and come from a driving radius of two to six hours.
- Occupancy is low compared to national averages; in 2007 Washington saw 50% occupancy vs. a national average of 63%. Statistically, these figures are low and will not compel development of additional lodging properties in Washington.
- Winter months of January and December are slowest, summer months of June-July and off-shoulder months of May, September and October are typically the strongest.
- Saturday is the highest weekday occupancy at 60.1%, while Sunday is the lowest at 33.5%.
- The inventory of lodging age distribution is as follows:

Era/% of Market Lodging Property Name	Open Date	STR Room Count	TOTAL
Unknown = 17.9%			69
Sunset Inn	~	24	
Washington Motel	~	45	
1960s = 30.3%			117
EconoLodge	Jun-65	45	
Day Inn	May-66	72	
1970s and 1980s = 0.0%			0
1990s = 29.5%			114
Comfort Inn	Jun-93	56	
Holiday Inn Express	Feb-97	58	
2000s = 22.3%			86
Hampton Inn	Jun-02	86	
7 Properties	TOTAL	386	100%

Sources: WTDA Database and STR Six-Year Trend Report – Washington, NC

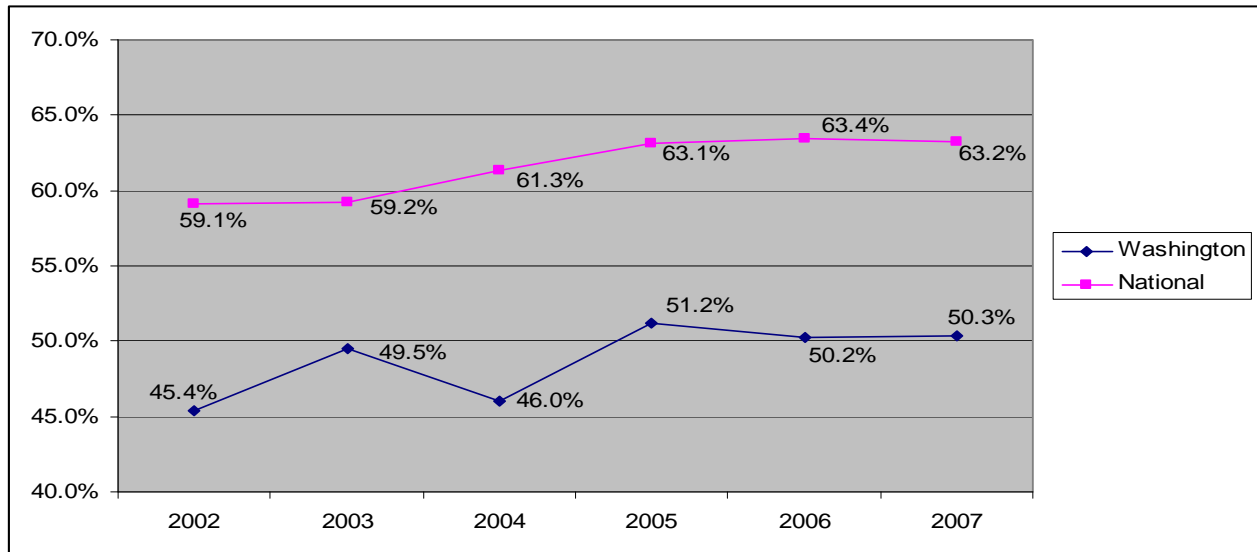
2007 Annual Overall Lodging Market Mix

2007		Category
70.5%		TOTAL LODGING RESPONSE RATE (by room count)
49.5%		Corporate Business
	49.51%	Individual Business Travelers
21.1%		Leisure
	8.54%	Tourists (visiting local attractions, historic sites, shopping, etc.)
	6.60%	Visiting Friends & Relatives
	4.70%	Shooting & Tournaments
	1.32%	Fishing
14.7%		Transient/Other
	12.12%	Transient (passing through as part of a longer trip)
	2.60%	Other (specify):
12.2%		Group
	8.26%	Wedding/Reunions/Family Events/Social Events
	2.64%	Team Sports, Tournament & Events
	1.27%	Group Tour/Motorcoach
2.4%		Convention/Meeting

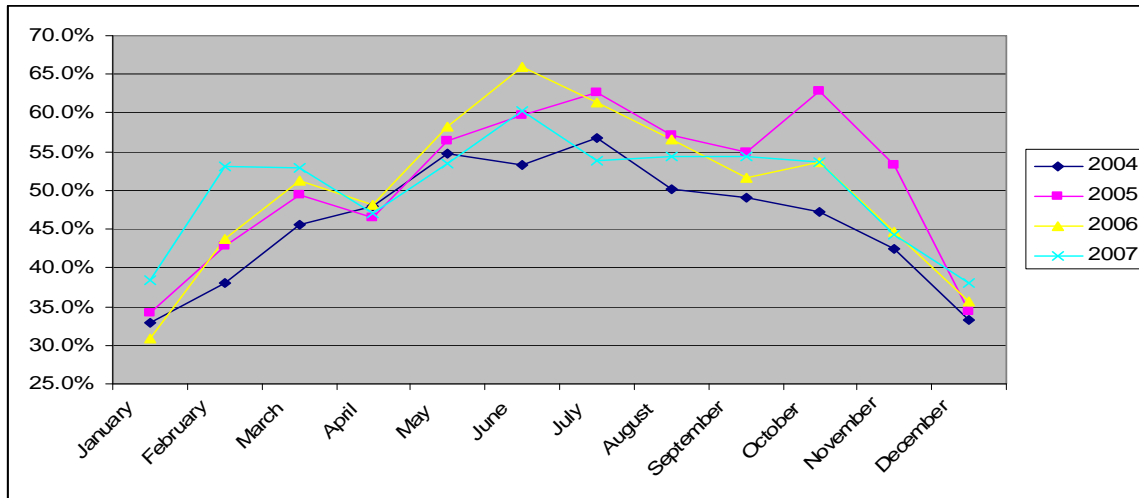
Source: RTM Lodging Survey

Lodging Occupancy Patterns

Six-Year Washington & National Occupancy Trends

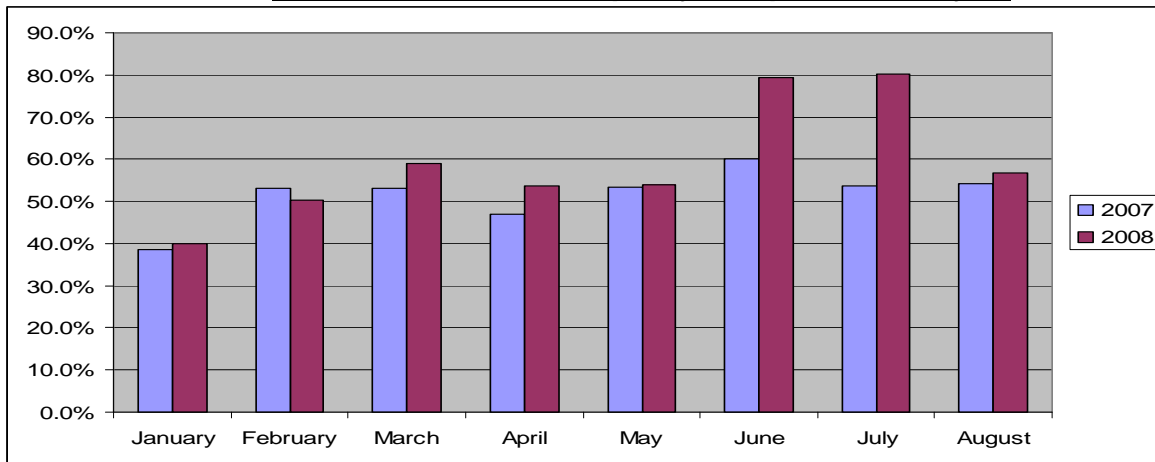


Four-Year Lodging Occupancy Trends



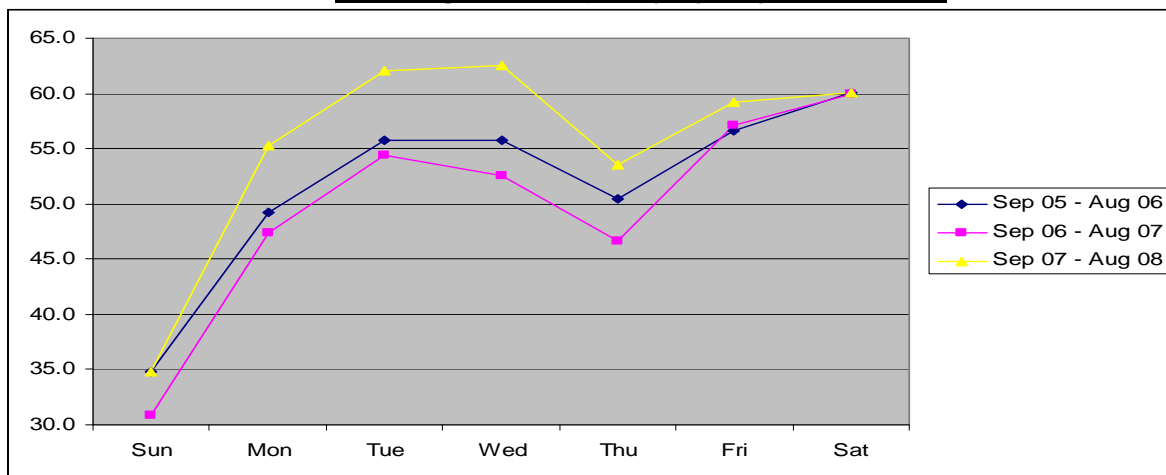
Source: STR Six-Year Trend Report for Washington

2007 and 2008 YTD Occupancy Comparative Analysis



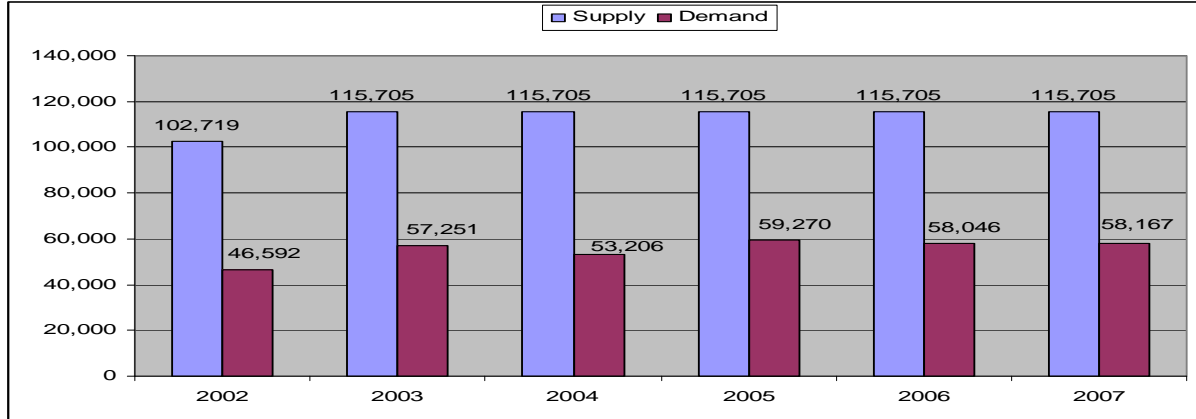
Source: STR Six-Year Trend Report for Washington

Washington Occupancy by Day of the Week



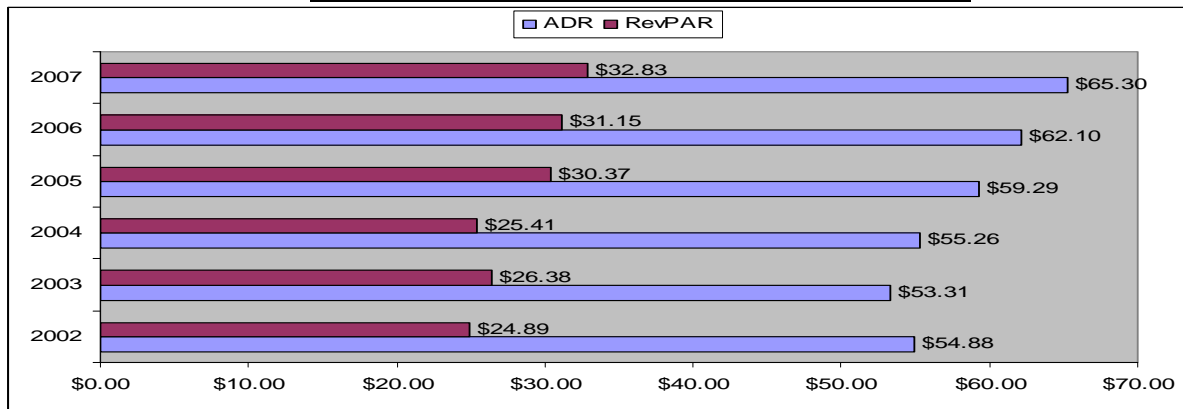
Source: STR Six-Year Trend Report for Washington

Washington Lodging Annual Supply and Demand



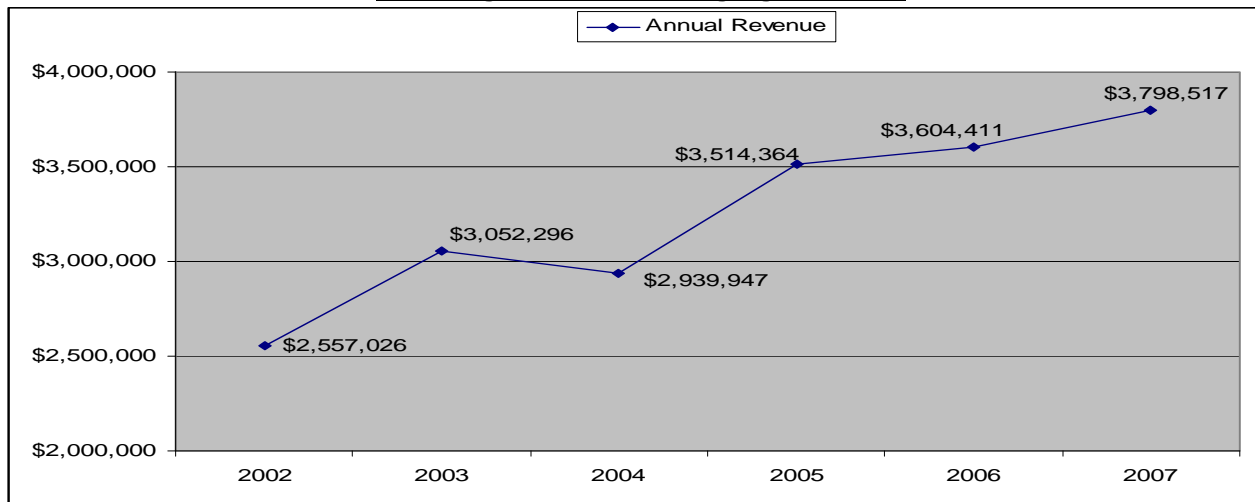
Source: STR Six-Year Trend Report for Washington

Four-Year Washington ADR and RevPAR Trend



Source: STR Six-Year Trend Report for Washington

Washington Annual Lodging Revenue



Source: STR Six-Year Trend Report for Washington

Summary of Washington Tourism Development Authority (WTDA) Performance Review

WTDA Revenues and Funding

	ACTUAL	ESTIMATED	ADOPTED
REVENUES	FY 2006-2007	FY2007-2008	FY2008-2009
Occupancy Taxes	\$230,076.00	\$ 237,594.00	\$ 235,000.00
Earned Interest	\$ 7,027.00	\$ 3,600.00	\$ 2,500.00
Miscellaneous Revenue	\$ 10,565.00	\$ 701.00	\$ -
Co-op Print Advertising Revenue	\$ -	\$ 7,475.00	\$ -
Website Directory	\$ 3,500.00	\$ 1,600.00	\$ 1,500.00
Visitor Center Concessions	\$ 12,298.00	\$ 18,500.00	\$ 15,000.00
Civic Center Rentals	\$ 45,762.00	\$ 73,274.00	\$ 76,500.00
Civic Center Fees	\$ 14,747.00	\$ 7,200.00	\$ 8,013.00
Civic Center Concessions	\$ 301.00	\$ 86.00	\$ 500.00
Civic Center Catering Surcharge	\$ -		\$ 500.00
Civic Center Miscellaneous Revenue		\$ 1,325.00	\$ -
City Contribution to Civic Center	\$ 50,000.00	\$ 50,000.00	\$ 50,000.00
Fund Balance Appropriated	\$ -	\$ 34,856.00	\$ 16,902.00
TOTAL REVENUES	\$374,276.00	\$ 436,211.00	\$ 406,415.00

Governance for WTDA

The WTDA reports to the City of Washington and the seven (7) members of the WTDA Board are appointed by Washington City Council.

WTDA Staff

The Director of the WTDA reports directly to the Chair of the Commission and serves as an employee of the City of Washington. The six person staff of the Washington Civic Center and the three visitor center attendants report to the Tourism Development Director.

WTDA Budget Analysis

WTDA 2008 Budget & Percentage of Total Expenditures

WTDA DIVISION EXPENSES	ACTUAL	% of	ESTIMATED	% of	ADOPTED	% of
	FY 2006/07	whole	FY2007/08	whole	FY2008/09	whole
Adm. Charges to City (Staff)	\$ 108,068	44.3%	\$ 111,960	39.5%	\$ 108,368	43.1%
Marketing Outreach	\$ 95,047	39.0%	\$ 121,457	42.9%	\$ 97,928	38.9%
Office Overhead	\$ 40,858	16.7%	\$ 49,861	17.6%	\$ 45,402	18.0%
WTDA TOTAL EXPENSES	\$ 243,973	100%	\$ 283,278	100%	\$ 251,698	100.0%

Source: WTDA Financials

Destination Marketing Association International (DMAI) recommends:

- 25-40% Salaries and Benefits
- 10-15% Overhead
- 40%+ Marketing and Outreach

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A review of the three basic budget categories for WTDA, as outlined above by the DMAI, reveals that the WTDA is spending the funding it receives appropriately as a percentage of the whole budget.

Inquiries Generated by WTDA

2007/08	
Phone	53
Mail Fulfillment	588
Website Inquiries	155
Total Traditional Inquiries	796
Internet (Website Unique Visits)	48372
Total Traditional Inquiries & Website Sessions	49168
Media Placement & PR Expense	\$104,857
Net Cost Per Inquiry	\$2.17

2007 North Carolina Travel and Tourism Economic Impact Data by Jurisdiction

Jurisdiction/Rank	Travel Spending (\$ millions)	Travel Generated Employment (# of jobs)	State Taxes - Travel Generated (\$millions)	Local Taxes - Travel Generated (\$millions)	TOTAL Travel Generated Taxes (\$millions)	Population of Jurisdiction	Households in Jurisdiction	TAX RELIEF Per Capita	TAX RELIEF Per Household
Pitt (21)	\$ 176.66	1,990	\$ 8.82	\$ 4.14	\$ 12.96	145,619	52,539	\$ 89.00	\$ 246.67
Craven (35)	\$ 101.70	1,004	\$ 5.28	\$ 2.37	\$ 7.65	94,875	34,582	\$ 80.63	\$ 221.21
Beaufort (47)	\$ 64.97	450	\$ 3.13	\$ 4.11	\$ 7.24	46,355	18,319	\$ 156.19	\$ 395.22
Hyde (72)	\$ 27.29	370	\$ 1.27	\$ 1.53	\$ 2.80	5,341	2,185	\$ 524.25	\$ 1,281.46
Martin (73)	\$ 27.24	250	\$ 1.42	\$ 0.72	\$ 2.14	24,342	10,020	\$ 87.91	\$ 213.57
Pamlico (87)	\$ 14.98	90	\$ 0.61	\$ 1.75	\$ 2.36	12,785	5,178	\$ 184.59	\$ 455.77
Washington (89)	\$ 12.83	100	\$ 0.68	\$ 0.57	\$ 1.25	13,227	5,367	\$ 94.50	\$ 232.90
North Carolina	\$ 16,510.74	190,890	\$ 814.98	\$529.03	\$1,344.01	8,856,505	3,132,013	\$ 151.75	\$ 429.12

Sources: FY 2007 North Carolina Travel Economic Impact Report -, US Census Bureau

Summary of Attractions Survey

- Of those reporting the majority of attractions have undergone some type of renovation since opening.
- Attractions reported an increase in visitation since 2006.
- 83.3% of visitors are from out of town.
- Visitation patterns: June and July were reported to be the busiest months and January and November were reported as the slowest months.
- Top Feeder states: North Carolina, Virginia and Florida.
- Staff: All attractions reported having at least one full time staff member.

ATTRACTION SURVEY	2007
Individual Visitors (regular daily admissions)	
Local residents	16.67%
Out of town visitors	83.33%
Total (percentages must total 100%)	100%
Groups:	
College/university/education groups	51.86%
Sports (tournaments, groups)	0.0%
Group Tour/motorcoach	2.67%
Weddings/reunions/family events	3.06%
Social Clubs (Garden, Book, etc)	19.8%
Religious/Church	5.97%
Association	13.64%
Other (specify): _____	3.0%
TOTAL (percentages must total 100%)	100%

Summary of Visitor Intercept Interviews

Respondents Profile and Responses	Business	Leisure	Pass Through	Visiting Friends & Relatives	Overall
Quantity of Interviews:	27	27	18	29	101
Demographics:					
Average Age	50.2	57.7	58.7	52.0	54.1
Gender: Male	70.37%	54.17%	29.41%	37.93%	49.48%
Female	29.63%	45.83%	70.59%	62.07%	50.52%
Point Of Origin:	NC SC	NC OH	NC VA	NC VA	NC VA
Generations:					
War Generation 80+	0.00%	0.00%	0.00%	0.00%	0.00%
Silent Generation	14.81%	32.00%	47.06%	20.69%	26.53%
Baby Boomer	55.56%	64.00%	47.06%	51.72%	55.10%
Generation X	29.63%	4.00%	5.88%	27.59%	18.37%
Generation Y	0.00%	0.00%	0.00%	0.00%	0.00%
Travel Party					
Adults traveling without children	96.30%	88.46%	77.78%	41.38%	75.00%
Average # adults in party	1.48	2.19	1.94	2.24	1.97
Adults traveling with children	3.70%	11.54%	22.22%	58.62%	25.00%
Average # of children in party	1.00	1.67	1.50	1.71	1.64
Overnighting?					
Yes	88.89%	74.07%	55.56%	93.10%	80.20%
No	11.11%	25.93%	44.44%	6.90%	19.80%
Average Length of Stay					
Nights	3.92	3.80	2.40	3.22	3.47
Trip Purpose					
Visit friends/relatives/reunion/gathering	0.00%	0.00%	0.00%	100.00%	28.71%
Business	88.89%	0.00%	0.00%	0.00%	23.76%
Vacation/getaway/leisure	0.00%	81.48%	0.00%	0.00%	21.78%
Part of longer trip	0.00%	7.41%	100.00%	0.00%	19.80%
Other	11.11%	7.41%	0.00%	0.00%	4.95%
Outdoor recreation	0.00%	3.70%	0.00%	0.00%	0.99%
Meeting/conference	0.00%	0.00%	0.00%	0.00%	0.00%
Boating	0.00%	0.00%	0.00%	0.00%	0.00%
First Visit					
Yes	22.22%	40.74%	83.33%	6.90%	33.66%
No	77.78%	59.26%	16.67%	93.10%	66.34%
If No, How Many Prior Visits?					
1 Time	0.00%	46.67%	66.67%	7.41%	16.92%
2 Times	15.00%	20.00%	33.33%	11.11%	15.38%
3 Times	30.00%	26.67%	0.00%	11.11%	20.00%
4 Times	5.00%	0.00%	0.00%	3.70%	3.08%
5 Times	5.00%	6.67%	0.00%	14.81%	9.23%
6 or More Times	45.00%	0.00%	0.00%	51.85%	35.38%
Average Number of Times	4.65	2.00	1.33	5.05	3.89

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Respondents Profile and Responses	Business	Leisure	Pass Through	Visiting Friends & Relatives	Overall
Did you visit primarily to attend a gathering/meeting/group event?					
Yes	3.85%	4.00%	0.00%	58.62%	19.39%
No	96.15%	96.00%	100.00%	41.38%	80.61%
Trip Planning Source					
Internet (specify)	59.26%	44.44%	50.00%	48.28%	50.50%
Previous knowledge	40.74%	40.74%	16.67%	51.72%	39.60%
Friends/family referral	0.00%	14.81%	16.67%	41.38%	18.81%
Office/work referral	48.15%	0.00%	0.00%	0.00%	12.87%
Guide (specify)	0.00%	0.00%	16.67%	0.00%	2.97%
Brochure (specify)	0.00%	3.70%	11.11%	0.00%	2.97%
Other (specify)	3.70%	0.00%	5.56%	0.00%	1.98%
Newspaper/magazine story	0.00%	0.00%	0.00%	0.00%	0.00%
Print ad (specify)	0.00%	0.00%	0.00%	0.00%	0.00%
Trip Planning Time					
Spur of the moment	0.00%	29.63%	29.41%	17.24%	18.18%
7-10 days before travel	15.38%	7.41%	35.29%	6.90%	14.14%
14-21 days before travel	46.15%	25.93%	5.88%	13.79%	24.24%
30-45 days before travel	34.62%	33.33%	23.53%	34.48%	32.32%
More than 60 days before travel	3.85%	3.70%	5.88%	27.59%	11.11%
Transportation Mode					
Personal auto	96.30%	77.78%	94.44%	93.10%	90.10%
Other (specify)	3.70%	22.22%	5.56%	3.45%	8.91%
Combo fly/rental car	0.00%	0.00%	0.00%	3.45%	0.99%
Motor coach/bus	0.00%	0.00%	0.00%	0.00%	0.00%
Activities					
Dining out	100.00%	96.30%	94.44%	96.55%	97.03%
Shopping	40.74%	96.30%	77.78%	82.76%	74.26%
Visit NC Estuarium	11.11%	66.67%	55.56%	51.72%	45.54%
Driving/sightseeing	11.11%	48.15%	33.33%	10.34%	24.75%
Business	85.19%	0.00%	0.00%	0.00%	22.77%
Boating/fishing	22.22%	25.93%	5.56%	13.79%	17.82%
Visit Historic Bath	11.11%	33.33%	16.67%	10.34%	17.82%
Other (specify)	7.41%	14.81%	5.56%	6.90%	8.91%
Sleep late/nap	3.70%	11.11%	5.56%	0.00%	4.95%
Visit a beach (Outer Banks or other)	3.70%	7.41%	5.56%	3.45%	4.95%
Visit Belhaven	0.00%	7.41%	0.00%	0.00%	1.98%
Visit Aurora Fossil Museum	3.70%	3.70%	0.00%	0.00%	1.98%
Movies/drive-in	3.70%	0.00%	0.00%	0.00%	0.99%
Attend a cultural event	0.00%	3.70%	0.00%	0.00%	0.99%
Visit Goose Creek State Park	0.00%	3.70%	0.00%	0.00%	0.99%
Shooting	0.00%	0.00%	0.00%	0.00%	0.00%

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Response	Business	Leisure	Pass Through	Visiting Friends & Relatives	Overall
Yes	26.92%	45.83%	5.88%	14.81%	24.47%
No	73.08%	54.17%	94.12%	85.19%	75.53%

Did or will any member of your party visit/attend museum/arts/cultural event?

Response	Business	Leisure	Pass Through	Visiting Friends & Relatives	Overall
Yes	8.00%	52.00%	38.89%	32.14%	32.29%
No	92.00%	48.00%	61.11%	67.86%	67.71%

Did or will any member of your party take day trips or visit other areas?

Response	Business	Leisure	Pass Through	Visiting Friends & Relatives	Overall
Yes	11.54%	36.36%	23.53%	10.71%	19.35%
No	88.46%	63.64%	76.47%	89.29%	80.65%

Did or will any member of your party visit historic sites?

Response	Business	Leisure	Pass Through	Visiting Friends & Relatives	Overall
Yes	7.69%	32.00%	6.25%	10.71%	14.74%
No	92.31%	68.00%	93.75%	89.29%	85.26%

Did or will any member of your party shop?

Response	Business	Leisure	Pass Through	Visiting Friends & Relatives	Overall
Yes	59.26%	100.00%	77.78%	86.21%	81.00%
No	40.74%	0.00%	22.22%	13.79%	19.00%

When visiting an area, how often do you stop at a visitor center to get information on things to see and do?

Response	Business	Leisure	Pass Through	Visiting Friends & Relatives	Overall
Never	0.00%	0.00%	0.00%	0.00%	0.00%
Rarely	18.52%	3.85%	0.00%	11.11%	9.28%
Fairly often	74.07%	53.85%	47.06%	74.07%	63.92%
Frequently	7.41%	42.31%	52.94%	14.81%	26.80%

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Intercept Survey Data	Business	Leisure	Pass Through	Visiting Friends & Relatives	Overall
Average Overall Visit Satisfaction Rating	4.50	4.85	4.71	4.86	4.74
Amenity Rating					
Level of service/employee training	4.31	4.48	4.56	4.48	4.45
Ease of finding visitor information	4.00	4.42	4.87	4.43	4.43
Overall appeal of the attractions in area	4.13	4.33	4.40	4.30	4.28
Signage and wayfinding	4.04	4.17	4.29	4.44	4.23
Variety of shopping & merchandise	4.00	4.25	4.36	4.17	4.19
Lodging value you received for price paid	4.04	4.36	4.11	3.88	4.06
Quality of the lodging	3.96	4.33	4.11	3.83	4.01
Range of choices for dining	3.69	3.48	3.75	3.76	3.66

Retail merchandise that appeals the most?

Retail Shop merchandise	Business	Leisure	Pass Through	Visit Friends & Relatives	Overall
Books & music	55.56%	70.37%	72.22%	62.07%	64.36%
Edibles	40.74%	44.44%	38.89%	41.38%	41.58%
Garden and patio	29.63%	48.15%	44.44%	34.48%	38.61%
Housewares & décor	25.93%	33.33%	55.56%	41.38%	37.62%
Shoes & purses	29.63%	18.52%	38.89%	51.72%	34.65%
Jewelry and accessories	29.63%	29.63%	22.22%	44.83%	32.67%
Clothing – women’s apparel	25.93%	18.52%	27.78%	51.72%	31.68%
Collectibles	29.63%	33.33%	33.33%	20.69%	28.71%
Kitchen & dining	18.52%	18.52%	38.89%	34.48%	26.73%
Outdoor recreation equipment/outfitter	37.04%	25.93%	16.67%	17.24%	24.75%
Health & beauty (soaps, bath products, etc.)	22.22%	22.22%	22.22%	27.59%	23.76%
Antiques	18.52%	29.63%	38.89%	6.90%	21.78%
Make in North Carolina items	14.81%	11.11%	11.11%	10.34%	11.88%
Fine art, sculpture, etc.	11.11%	11.11%	16.67%	6.90%	10.89%
Furniture & home furnishings	11.11%	7.41%	5.56%	13.79%	9.90%
Fishing tackle/hunting supplies	14.81%	7.41%	5.56%	6.90%	8.91%
Folk art	0.00%	14.81%	11.11%	10.34%	8.91%
Marine & boat supply	11.11%	14.81%	0.00%	0.00%	6.93%
Electronics	3.70%	3.70%	5.56%	6.90%	4.95%
Clothing – children’s	0.00%	0.00%	11.11%	6.90%	3.96%
Contemporary fine art crafts	0.00%	11.11%	0.00%	3.45%	3.96%
Clothing – men’s apparel	3.70%	0.00%	5.56%	0.00%	1.98%
Other (specify)	3.70%	0.00%	5.56%	0.00%	1.98%
Big ticket items (vehicles, appliances)	0.00%	0.00%	0.00%	0.00%	0.00%

Daily and Trip Expenditures

Category	Business	Leisure	Pass Through	Visit Friends & Relatives	Overall
Lodging	\$80.04	\$68.38	\$79.00	\$82.52	\$78.12
Food/meals	\$47.04	\$50.19	\$36.29	\$68.12	\$52.04
Attractions/amusements	\$11.67	\$6.48	\$10.20	\$11.64	\$9.63
Shopping	\$36.89	\$43.63	\$61.07	\$40.87	\$44.60
Transportation	\$27.04	\$34.83	\$56.62	\$34.05	\$34.90
Average Daily Expense	\$202.68	\$203.51	\$243.18	\$237.20	\$219.29
Average length of stay	2.92	2.80	1.40	2.22	2.47
Total Trip Expenditures	\$591.83	\$569.83	\$340.45	\$526.58	\$541.65

Likes and Dislikes

	Business	Leisure	Pass Through	Visit Friends & Relatives
Likes	Waterfront/riverfront People Downtown Shops	Waterfront Riverwalk History Quaint	Waterfront/riverfront Downtown Shops Restaurants	Waterfront/riverfront Family/Friends Riverwalk Downtown
Dislikes	Lack of downtown restaurants Lack of waterfront restaurants and shops	Lack of waterfront dining More choices of restaurants Lack of downtown restaurants	Needs restaurants on waterfront Need more restaurants Need restaurants downtown	Need dining on waterfront Need more restaurants

Desired New Products

Activity, Facility or Experience	Business	Leisure	Pass Through	Visit Friends & Relatives	Overall
Waterfront lodging	96.30%	70.37%	61.11%	75.86%	77.23%
Guided nature tours	70.37%	81.48%	61.11%	44.83%	64.36%
More unique & fine dining	77.78%	51.85%	50.00%	58.62%	60.40%
A lively, animated village-style area with shops & restaurants	55.56%	59.26%	44.44%	44.83%	51.49%
An outdoor performance venue (concerts)	14.81%	44.44%	27.78%	37.93%	31.68%
Guided, narrated walking historic tour	22.22%	48.15%	33.33%	20.69%	30.69%
More upscale lodging	40.74%	29.63%	11.11%	24.14%	27.72%
Boat rentals	33.33%	11.11%	22.22%	24.14%	22.77%
Fishing equipment outfitters & rentals	18.52%	18.52%	11.11%	13.79%	15.84%
Other (specify)	7.41%	11.11%	5.56%	6.90%	7.92%
Jet ski rentals	11.11%	3.70%	0.00%	0.00%	3.96%

Strategic Direction

Visitors think of Washington, North Carolina as a scenic and charming coastal riverfront town named for George Washington near the larger town of Greenville. Washington is located where the Pamlico River meets the Atlantic Ocean in eastern North Carolina along Highway 17, known as the “Coastal Highway” from Virginia to Florida. This route channels approximately 18,000 automobiles per day through Washington. Nearby Greenville dominates as a business and services hub.

Washington’s riverfront setting is a picturesque backdrop for its small, historic and charming downtown that has a good number of shops and restaurants. The North Carolina Estuarium, an outstanding museum that captures the unique story of this second largest estuary system in the United States, is located along the river adjacent to downtown and provides visitor interest as well. The river and estuary, the lively downtown, as well as Washington’s Colonial and Civil War era history, combine to create a destination that has good appeal.

People in Washington are very friendly and exhibit a luxuriously relaxed persona. They are willing to take time for, and are genuinely interested in, visitors. They are proud of their home. Thus, front-line service was dependably warm and friendly.

Washington has a hotel inventory of approximately 386 rooms. However, only about 200 offer modern appeal. The rest are primarily utilized by the construction/commercial market. Thus, the hotel inventory is considered limited. Also, there is no waterfront lodging. Nearby Greenville does provide a good amount of “overflow” that benefits Washington lodging.

Washington has successfully developed its waterfront downtown with a good number of unique and locally-owned shops and restaurants which provide significant appeal for travelers. It is a pleasant setting. Waterfront dining, however, is very limited.

Regarding meeting and event venues, there is a small civic center with good meeting space, but limited in potential due to size. Also, there is only one fulltime staff person at the civic center and one fulltime staff person at the WTDA. Thus, direct sales are limited at best. Small meeting and event space is also available at the Hampton Inn, Holiday Inn Express, the Yacht Club, the restored Turnage Theater and some other small event venues.

McConnell Sports Complex has adequate facilities for limited sports recruitment including soccer, baseball, softball, etc. However, Washington must compete with the significant facilities in nearby Greenville-Pitt County making sports recruitment challenging.

Thus, while Washington is somewhat shadowed by nearby Greenville, it has distinct appeal.

The Washington Tourism Development Authority (WTDA) is funded by a 6% lodging tax which nets the WTDA approximately \$250,000 for fiscal year 2008-2009. The WTDA has used its funds appropriately, but is limited to the size of its budget. Thus, there is deliberate, but limited progress in marketing. The leaders of Washington are to be commended for their vision in identifying and developing travel and tourism as a targeted industry.

RTM encourages the City of Washington to adopt a strategic plan that will assist them in protecting and preserving the heritage and assets of this area while generating economic impact. It is a worthy pursuit.

Strategic Direction

RTM recommends the following key strategies for continuing to develop travel and tourism in Washington, North Carolina:

- 1. Establish a strategic plan for long-term sustainability of travel and tourism:**
 - Protect the natural resources and authenticity of downtown.
 - Continue to develop downtown into a lively, animated village-style setting with shops and restaurants.
 - Recruit semi-retired Baby Boomers for small businesses, downtown living, and a unique, high-quality lifestyle.

- 2. Develop new products likely to drive continued economic impact. Create New Tourism Product Development Group to champion development tailored to potential user groups including:**
 - Waterfront lodging (preferably with dining)
 - More unique and fine dining
 - Continued development of downtown as lively village-style dining and shopping
 - Sports facilities which provide a competitive edge over other destinations
 - Wedding, family reunion, group gatherings facilities
 - Outdoor recreation outfitters, guides, facilitators

- 3. Develop distinct gateways and a visitor center on Highway 17 in the downtown Washington area to provide orientation, facilitation, and generate increased visitor spending to those passing through and staying in the area. Add billboards after new By-Pass is completed.**
 - Gateways are needed along Highway 17 to announce arrival in Washington and provide a sense of place.
 - Simply put, this strategy is to “fish where the fish are” and place a visitor center/sales showcase where it will drive the most visitors into downtown and to cash registers.
 - The visitor center needs to be a “selling showcase” rather than simply a building with brochures. It needs to actively engage the visitor and compel visitation.
 - Add billboards before and after new Highway 17 By-Pass to encourage driving the older Highway 17 route into Washington.

- 4. Establish a clear mission statement for the WTDA.**

5. Understand the visitor segments that comprise the current visitor mix and those that provide the most potential for growth.

Leaders of Washington need to understand the current travel and tourism customer mix, how to meet the needs of each, and how to target segments for growth.

2007		Category
70.5%		TOTAL LODGING RESPONSE RATE (by room count)
49.5%		Corporate Business
	49.51%	Individual business travelers
21.1%		Leisure
	8.54%	Tourists visiting the area (local attractions, historic sites, shopping, etc.)
	6.60%	Visiting local friends & relatives
	4.70%	Shooting & Tournaments
	1.32%	Fishing
14.7%		Transient/Other
	12.12%	Transient: Passing through as part of a longer trip
	2.60%	Other (specify):
12.2%		Group
	8.26%	Wedding/Reunions/Family events/Social events
	2.64%	Team Sports, Tournament & Event
	1.27%	Group Tour/Motorcoach
2.4%		Convention/Meeting

**6. Monitor satisfaction levels with categories of tourism products.
All ratings below a 4.0 are considered a failure.**

Amenity	Average Rating Business	Average Rating Leisure	Average Rating Pass through	Average Rating Visit Friend & Relatives	Average Rating Overall
<i>Level of service / employee training</i>	4.31	4.48	4.56	4.48	4.45
<i>Ease of finding visitor information</i>	4.00	4.42	4.87	4.43	4.43
<i>Overall appeal of the attractions in the area</i>	4.13	4.33	4.40	4.30	4.28
<i>Signage and wayfinding</i>	4.04	4.17	4.29	4.44	4.23
<i>Variety of shopping & merchandise</i>	4.00	4.25	4.36	4.17	4.19
<i>Lodging value you received for the price paid</i>	4.04	4.36	4.11	3.88	4.06
<i>Quality of the lodging</i>	3.96	4.33	4.11	3.83	4.01
<i>Range of choices for dining</i>	3.69	3.48	3.75	3.76	3.66

7. Tracking and growing per-visitor expenditures and tax relief is the primary objective of the WTDA.

Community leaders need to clearly understand that it is growth in per-visitor expenditures, as well as recruiting additional visitors that creates success. Visitors spend money and make a significant economic impact. "Tax relief" is created when visitors pay taxes and thus relieve the local residents from generating that tax revenue. The current visitor generated tax relief is approximately **\$395.228 annually per household** in Beaufort County.

	Amount	Amount	Amount	Amount	Amount
Category	Business	Leisure	Pass Through	Visit Friends & Relatives	OA
<i>Lodging</i>	\$80.04	\$68.38	\$79.00	\$82.52	\$78.12
<i>Food/meals</i>	\$47.04	\$50.19	\$36.29	\$68.12	\$52.04
<i>Attractions/amusements</i>	\$11.67	\$6.48	\$10.20	\$11.64	\$9.63
<i>Shopping</i>	\$36.89	\$43.63	\$61.07	\$40.87	\$44.60
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8. Educate community leaders and general public about the importance and viability of tourism for the greater community.

Adopted Unanimously by Washington Tourism Development Authority
Board of Directors, January 21, 2009.