

marketing
20PLAN25

FY 24-25





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insights FROM THE CEO

Challenges today for Destination Marketing Organizations (DMOs) include the daily changing landscape of what it means to be 21st century marketers. We all have to adapt and learn: using first-party data, developing advocacy plans, championing sustainability, defining the role of AI in marketing and more. These are just some of the tools DMOs are using to be leaders in their communities as they market leisure, group, and business travel. If Google and Facebook don't update or change something every week, it would be a miracle. Using the resources of professional agencies is becoming a necessity just to keep up.

As a mid-sized DMO, we are now in a position to contract with research firms as well as digital marketing agencies for Google Ads, and we recently invested in new up-to-date maps for use in our print brochures. Having the tools to be more successful and productive is critical as our staffing has not increased in five years; in fact it has decreased.



As a corridor destination along I-40 and I-95, the JCVB is leaning into a new “corridor” marketing plan for 24-25. In the short time we have used Placer.ai’s first party data (since April, '24) we have used data to narrow our focus on overnight guests to our destinations. Our marketing efforts since COVID have been based on “helping everyone”, and now it’s time to refocus on the top personas of our hotel guests. To do that, our plan is to create a series of integrated advertising campaigns based on the beliefs and statements about the experiences our visitors can enjoy as they make their way through Johnston County... all inspired by the quote attributed to Ralph Waldo Emerson, “It’s not the destination, it’s the journey”.

The quote’s meaning implies that, rather than concentrating only on getting there or achieving a goal, life’s true value is found in the experiences, development, and learning that happens along the way. It invites people to enjoy and cherish every second of life and we believe that travel contributes to our quality of life.

We will take these ideas (and data) and build our advertising campaigns using the five experiences our visitors engage in the most --- Shopping, Outdoor Recreation, Staying with Us, Culinary Travel, and Arts & Entertainment. And through our messaging - including print, digital, social media, website, etc. - we will encourage our visitors to Johnston County to Simply Enjoy the Journey!

Donna

travel research data

U.S. TRAVEL FORECAST

NEW Forecast Predicts United States will Continue to Struggle for International Inbound, & Domestic Business Travel.

The U.S. Travel Association released its biannual forecast for travel to and within the United States through 2027, showing international inbound travel and domestic business travel will continue to remain below pre-pandemic levels in 2024. The forecast, prepared by Tourism Economics, was released just days after U.S. Travel revealed the findings of a global competitiveness report conducted by Euromonitor International. The report found the U.S. ranked 17th out of 18 top markets for travel due to decades of underinvestment and a lack of focus and coordination from federal policymakers.

While the US inches back to pre-pandemic travel numbers, other countries are actively advancing strategies to gain international visitors and are now ahead of the United States in the race to win back the global travel market. The federal government can and must enact specific policies to jump start a more seamless, efficient and globally competitive travel industry.

International travel to the U.S. is growing quickly but is still far from a full pre-pandemic recovery. An expected global macroeconomic slowdown, a strong dollar, and lengthy visa wait times could inhibit future growth, with volume reaching 98% of 2019 levels in 2024 (up from 84% recovered in 2023) and achieving a full recovery in 2025. Spending levels, when adjusted for inflation, are not expected to recover until 2026.

Other countries with whom the U.S. directly competes have recovered their pre-pandemic visitation rates more quickly, and some countries—

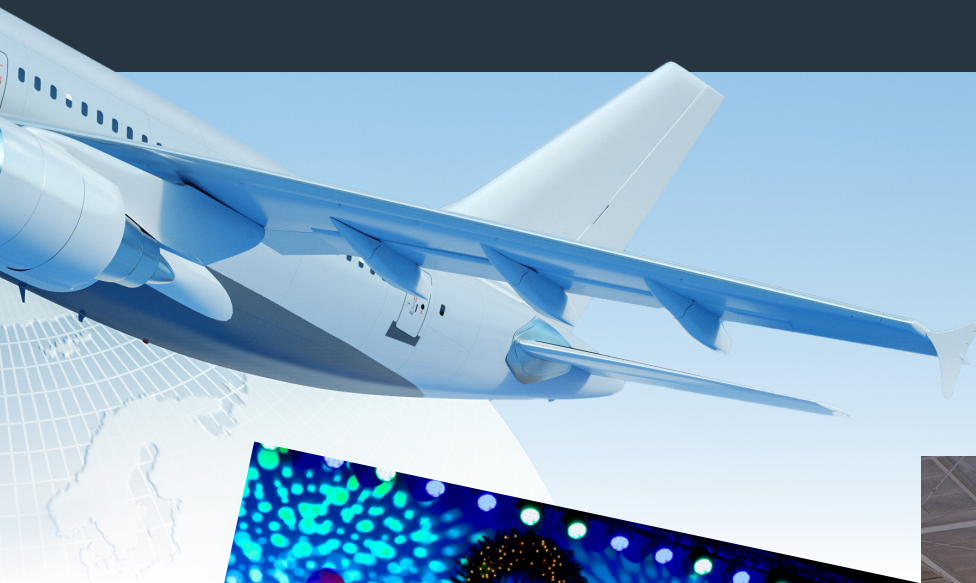
such as France and Spain—have even increased their share of the global travel market. Meanwhile, U.S. global market share is declining.

Business travel is still expected to grow in 2024, albeit at a slower rate. Volume in the sector is expected to end the year at 95% of 2019 levels—up from 89% recovered in 2023. Slowing economic growth will hinder domestic business travel's recovery, with a full comeback in volume not expected until 2026. Domestic business travel spending is not expected to recover to pre-pandemic levels within the range of the forecast.

Domestic leisure growth decelerated through three quarters of 2023 as consumer spending slowed amid higher borrowing costs, tighter credit conditions and the restart of student loan repayments. The sector achieved a full recovery to pre-pandemic levels in 2022.



International travel to the U.S. is growing quickly but is still far from a full pre-pandemic recovery.



VOLUME

U.S. TRAVEL FORECAST - VOLUME

	ACTUAL				FORECAST				
	2019	2020	2021	2022	2023	2024	2025	2026	2027
Total # of trips	2.40 B	1.60 B	2.04 B	2.30 B	2.38 B	2.45 B	2.52 B	2.59 B	2.65 B
Domestic person-trips	2.32 B	1.58 B	2.02 B	2.25 B	2.31 B	2.37 B	2.44 B	2.50 B	2.56 B
Leisure	1.85 B	1.40 B	1.77 B	1.88 B	1.90 B	1.93 B	1.98 B	2.02 B	2.07 B
Business	463.9 M	181 M	250 M	371 M	413.3 M	442.0 M	459.7 M	473.7 M	484.7 M
Auto	2.13 B	1.50 B	1.89 B	2.08 B	2.12 B	2.18 B	2.24 B	2.29 B	2.35 B
Air	188.9 M	79 M	131 M	174 M	188.6 M	197.3 M	202.2 M	204.4 M	207.7 M
International Arrivals	79.4 M	19.2 M	22.1 M	50.9 M	66.5 M	77.9 M	85.5 M	91.3 M	94.7 M
Canada	20.7 M	4.8 M	2.5 M	14.4 M	21.0 M	22.1 M	23.2 M	24.4 M	25.2 M
Mexico	18.3 M	6.8 M	10.4 M	12.5 M	14.6 M	18.3 M	20.3 M	21.6 M	22.3 M
Overseas	40.4 M	7.6 M	9.2 M	24.0 M	31.0 M	37.4 M	42.0 M	45.2 M	47.2 M

U.S. TRAVEL FORECAST - VOLUME, YOY % CHANGE

				FORECAST				
	2020	2021	2022	2023	2024	2025	2026	2027
Total # of trips	-33.2%	27.6%	12.7%	3.1%	3.2%	2.9%	2.6%	2.5%
Domestic person-trips	-31.8%	27.8%	11.4%	2.5%	2.8%	2.7%	2.4%	2.5%
Leisure	-24.5%	26.5%	6.2%	0.7%	1.9%	2.4%	2.3%	2.5%
Business	-60.9%	37.6%	48.6%	11.4%	7.0%	4.0%	3.0%	2.3%
Auto	-29.4%	25.7%	10.0%	2.0%	2.7%	2.7%	2.5%	2.6%
Air	-58.4%	67.0%	32.7%	8.3%	4.6%	2.5%	1.1%	1.6%
International Arrivals	-75.8%	15.0%	130.2%	30.8%	17.0%	9.8%	6.8%	3.7%
Canada	-76.8%	-47.4%	468.7%	46.1%	5.3%	4.8%	5.4%	3.2%
Mexico	-62.9%	52.7%	20.6%	16.1%	26.0%	10.6%	6.7%	2.9%
Overseas	-81.2%	20.8%	161.1%	29.3%	20.7%	12.4%	7.6%	4.4%

U.S. TRAVEL FORECAST - VOLUME, % OF 2019 LEVELS

				FORECAST				
	2020	2021	2022	2023	2024	2025	2026	2027
Total # of trips	67%	85%	96%	99%	102%	105%	108%	111%
Domestic person-trips	68%	87%	97%	100%	102%	105%	108%	110%
Leisure	76%	96%	101%	102%	104%	107%	109%	112%
Business	39%	54%	80%	89%	95%	99%	102%	104%
Auto	71%	89%	98%	100%	102%	105%	108%	110%
Air	42%	70%	92%	100%	104%	107%	108%	110%
International Arrivals	24%	28%	64%	83.8%	98%	108%	115%	119%
Canada	23%	12%	69%	101%	107%	112%	118%	122%
Mexico	37%	57%	68%	79%	100%	111%	118%	122%
Overseas	19%	23%	59%	77%	93%	104%	112%	117%

SPENDING

U.S. TRAVEL FORECAST - SPENDING (ADJUSTED FOR INFLATION)*

	ACTUAL				FORECAST				
	2019	2020	2021	2022	2023	2024	2025	2026	2027
Total Travel Spending	\$1.173 T	\$0.722 T	\$0.909 T	\$1.016 T	\$1.074 T	\$1.129 T	\$1.173 T	\$1.201 T	\$1.221 T
Leisure	\$866.8 B	\$621.8 B	\$787.0 B	\$798.1 B	\$826.2 B	\$863.9 B	\$896.9 B	\$920.5 B	\$938.6 B
Business	\$305.8 B	\$100.5 B	\$122.4 B	\$218.4 B	\$247.8 B	\$265.5 B	\$276.3 B	\$280.8 B	\$282.7 B
Domestic	\$991.8 B	\$681.4 B	\$868.3 B	\$918.3 B	\$943.1 B	\$975.6 B	\$999.6 B	\$1,010.6 B	\$1,020.7 B
Leisure	\$722.7 B	\$588.8 B	\$752.9 B	\$717.6 B	\$720.4 B	\$738.7 B	\$752.2 B	\$759.5 B	\$767.8 B
Business	\$269.5 B	\$92.9 B	\$115.4 B	\$200.7 B	\$222.6 B	\$236.8 B	\$247.4 B	\$251.2 B	\$252.8 B
Transient	\$156.5 B	\$63.0 B	\$81.4 B	\$122.1 B	\$131.6 B	\$138.9 B	\$145.2 B	\$147.7 B	\$148.9 B
Group	\$113.0 B	\$29.9 B	\$34.1 B	\$78.6 B	\$91.1 B	\$98.0 B	\$102.2 B	\$103.5 B	\$103.9 B
International**	\$180.5 B	\$40.9 B	\$41.1 B	\$98.1 B	\$130.9 B	\$153.9 B	\$173.6 B	\$190.7 B	\$200.7 B
Leisure	\$144.1 B	\$33.0 B	\$34.1 B	\$80.4 B	\$105.8 B	\$125.2 B	\$144.7 B	\$161.1 B	\$170.8 B
Business	\$36.4 B	\$7.9 B	\$6.9 B	\$17.7 B	\$25.1 B	\$28.7 B	\$28.9 B	\$29.6 B	\$29.8 B
Transient	\$21.9 B	\$5.0 B	\$4.6 B	\$12.4 B	\$16.0 B	\$17.6 B	\$17.5 B	\$18.1 B	\$18.1 B
Group	\$14.5 B	\$2.9 B	\$2.4 B	\$5.3 B	\$9.2 B	\$11.1 B	\$11.3 B	\$11.5 B	\$11.7 B

U.S. TRAVEL FORECAST - SPENDING, YOY % CHANGE (ADJUSTED FOR INFLATION)*

	ACTUAL			FORECAST				
	2020	2021	2022	2023	2024	2025	2026	2027
Total Travel Spending	-38.4%	25.9%	11.8%	5.7%	5.2%	3.9%	2.4%	1.7%
Leisure	-28.3%	26.6%	1.4%	3.5%	4.6%	3.8%	2.6%	2.0%
Business	-67.1%	21.8%	78.4%	13.5%	7.2%	4.1%	1.6%	0.7%
Domestic	-31.3%	27.4%	5.8%	2.7%	3.4%	2.5%	1.1%	1.0%
Leisure	-18.5%	27.9%	-4.7%	0.4%	2.5%	1.8%	1.0%	1.1%
Business	-65.5%	24.3%	73.8%	10.9%	6.4%	4.5%	1.5%	0.7%
Transient	-59.7%	29.1%	50.1%	7.8%	5.5%	4.5%	1.7%	0.8%
Group	-73.5%	14.0%	130.6%	15.8%	7.6%	4.3%	1.2%	0.4%
International**	-77.3%	0.4%	139.0%	33.4%	17.6%	12.8%	9.9%	5.2%
Leisure	-77.1%	3.5%	135.7%	31.5%	18.4%	15.6%	11.3%	6.1%
Business	-78.2%	-12.6%	155.0%	42.0%	14.1%	0.7%	2.7%	0.7%
Transient	-77.1%	-8.8%	170.2%	29.3%	10.2%	-0.3%	3.3%	0.0%
Group	-79.8%	-19.0%	125.6%	71.5%	20.8%	2.4%	1.7%	1.7%

U.S. TRAVEL FORECAST - SPENDING, % OF 2019 LEVELS (ADJUSTED FOR INFLATION)*

	ACTUAL			FORECAST				
	2020	2021	2022	2023	2024	2025	2026	2027
Total Travel Spending	62%	78%	87%	92%	96%	100%	102%	104%
Leisure	72%	91%	92%	95%	100%	103%	106%	108%
Business	33%	40%	71%	81%	87%	90%	92%	92%
Domestic	69%	88%	93%	95%	98%	101%	102%	103%
Leisure	81%	104%	99%	100%	102%	104%	105%	106%
Business	34%	43%	74%	83%	88%	92%	93%	94%
Transient	40%	52%	78%	84%	89%	93%	94%	95%
Group	26%	30%	70%	81%	87%	90%	92%	92%
International**	23%	23%	54%	73%	85%	96%	106%	111%
Leisure	23%	24%	56%	73%	87%	100%	112%	119%
Business	22%	19%	49%	69%	79%	79%	82%	82%
Transient	23%	21%	56%	73%	80%	80%	83%	83%
Group	20%	16%	37%	63%	76%	78%	80%	81%

*All spending data is cited in "real" 2019 \$, deflated based on the Travel Price Index

** Includes general travel spending and passenger fares (does not include education/health/worker spending)

Leisure MARKETING

The primary focus of the Johnston County Visitors Bureau's (Bureau) destination marketing efforts have always been to drive visitor demand in identified top target markets for leisure travel. Within the last year the Bureau's in-house team has been able to access new data insights using Placer.ai; this provides first-party data on where visitors to the county travel from, exactly where they go while in-market, and how long they stay. Following the recovery of the impact COVID-19 had on tourism, the roller coaster trend of "revenge travel" fizzled domestically into a mild recession. Given the high competition regionally for overnight visitors, the Bureau's team decided the focus needed to return to hotel stays. In FY25 marketing efforts will aim to reach overnight travelers and promote activities that drive overnight visitation. Emerging from this new focus are several integrated marketing campaigns, targeting overnight travelers along I-95 and I-40.

Defining the Market

The Bureau is using newly-acquired data platform Placer.ai to define target audiences; asking questions to extrapolate useful information from the data. Who are JoCo's existing best customers and where are they traveling from? What qualities and travel habits do these customers share? What caused these customers to search for overnight accommodations in JoCo? What do these customers gain by choosing our destination instead of the competition?

This new data moves beyond geographical targeting to consumer behavior targeting. Using demographic and psychographic selection tools offered by many of the chosen advertising mediums, the Bureau can target specific types of potential visitors (personas) based on their travel needs and habits, including Multi generational Travel (parents and grandparents with children), Families Traveling with Children (spring break, fall break, summer travel), Millennials & Gen Z Weekenders, Young Baby Boomers 60+ (adventure seekers), and Snowbirds (travelers who "migrate" seasonally with the weather).

Focus Experiences

Integrated marketing is a strategy for delivering a unified message across all the marketing channels a brand uses. Without an integrated marketing strategy, marketers risk delivering mixed messages or communicating in a disconnected voice. For FY25 the Bureau will execute multiple integrated marketing campaigns using the previously mentioned data and personas. The goal is to attract more customers who have similar goals, aspirations, pain points for purchasing, and challenges as your current best customers.

The campaign's themes have been determined using the top five visitor experience categories the county has to offer: accommodations, shopping, outdoor recreation, culinary experiences, and arts & entertainment. Messaging follows a core series of beliefs about what JoCo offers visitors which the Bureau aligned creatively with the categories. These five examples are just a few of the "we believe" phrases which will drive the creative direction for the year. The distillation of the "we believe" messaging provides the overarching tagline for the year's marketing efforts - Simply Enjoy the Journey.



Staying Overnight

Hotel development in the county remains strong and is outpacing other rural communities in the Triangle (source: CoStar Data). In particular there is interest in long-term stay properties and the growing need for limited or full service properties. Two hotels are currently under construction with four more in development. Messaging to potential overnight visitors, and those who have stayed previously with corridor competitors, will be to STAY Along the Way. The goal is to highlight the county's exits off I-95 and I-40 as the optimal choice for travelers looking for overnight amenities.

Shopping

Outlet shopping continues to be a major reason visitors along I-95 choose the county as both a regional day trip and overnight destination. Messaging will be to SHOP Along the Way and will focus on the Carolina Premium Outlets as the county's largest attraction. Additional messaging will include regional shopping attractions like DeWayne's as well as directing visitors to the unique boutique shopping in the county's downtowns.

Outdoor Recreation

The Bureau will continue to market recreation and participate in the Outdoor NC partner campaigns. The messaging here will be to PLAY, HIKE, and BIKE Along the Way. For the first half of FY25 the messaging will focus heavily on the theme of Hiking & History at Bentonville Battlefield. However, marketing to outdoor enthusiasts will continue throughout the year and will include Howell Woods Environmental Learning Center, Clemmons Educational State Forest, greenways, and other outdoor activities.

Culinary Experiences

Food and drink trends in travel have shifted over the last several years to encompass a range of experiences; visitors no longer only seek out high-end cuisine when traveling, but also more local and/or unique flavors regardless of the venue or price point. The county now has a James Beard nominated chef, and JoCo's reputation has grown in the region for having several award-winning barbecue pit masters. TASTE Along the Way messaging will include a focus on, Redneck BBQ Lab, Old North State Food Hall, as well as other chef-driven, locally-owned and operated restaurants. The Bureau will also continue to promote the county's culinary trails: red hotdogs, coffee, sweets, and more. Lastly, after the recent debut of a brand new digital passport for the Beer, Wine, & Shine Trail (now with 9 locations in the county) parts of the campaign will focus on promoting the craft beverage passport throughout the year.

Arts & Entertainment

This campaign will focus mostly on attractions and museums - highlighting the Ava Gardner Museum, which remains an international draw to the area. Messaging will also include shows at venues like Live@ The Rudy, The Clayton Center, and the Paul A Johnston Auditorium. The central theme of this campaign is to encourage visitors to EXPLORE Along the Way, keeping in mind all the amazing things to do within each of JoCo's towns and off each exit.

Road Trip Marketing

Beliefs that animate our creative



01

Main Street Campaigns for our Towns

We believe...

if you are watching your GPS,
you are missing the exit to
adventure. Let us show you
what you are missing!

02

Get off the Exit to Explore

We believe...

in cruising main streets to
shop, dine and explore.
Smiling faces await you!





03

Promotion of Culinary Travel

We believe...

gas station diners offer top shelf cuisine. The joints aren't fancy but the food is the real deal!

05

Outlet Shopping and Girls Weekends

We believe...

you should brake for a great deal and buy twice as much (that's girl math!). Look how much you saved.

04

Promoting Overnight stays

We believe...

every interstate exit offers an opportunity to learn, play, and grow. Stay with us and find out what we mean.



Integrated Marketing Tactics

For Johnston County, leisure travel is the top producing market for in-state and out-of-state visitors, both day trips and overnight trips at 70% of hotel stays. Leisure marketing messages are integrated into the bureau's websites, social campaigns, print advertising, digital and email outreach, as well as publicity and in-person sales missions. Each integrated campaign uses every method available to the Bureau to push messaging into the best data-driven markets at the right time for past and potential visitors who are dreaming of, searching for, and making travel plans.

Mediums

Integrated marketing campaigns call for a diverse placement of ad mediums to account for both reach and frequency. Integrated marketing campaigns will include placing advertising where it has proven effective in the past, as well as working in new advertising mediums and platforms that the Bureau marketing team is excited to try.

- ◆ To reach leisure travelers along I-95 and I-40, billboards remain the best Point of Sale (POS) medium for promoting where to visit and where to overnight.
- ◆ The Bureau continues to place national and regional print ads in legacy publications like Our State, Atlanta Magazine, and Southern Living among others.
- ◆ Continue partnership with VisitNC by participating in Co-op Marketing Program opportunities which include print, email, and digital advertising aligned with the state's own marketing efforts.
- ◆ Place advertorial (sponsored content) with new/emerging media companies like Southbound Magazine, Philadelphia Magazine, as well as email campaigns with 6AM City.
- ◆ Attend direct-to-consumer, leisure-based shows in Atlanta and DC with VisitNC to interact directly with potential visitors in these major markets.
- ◆ Geofencing messaging will target travelers at both NC Welcome Centers on I-95, as they are within 1.5 hours of the county exits and considering where to stay overnight.
- ◆ Google remains a critical part of marketing the county and for FY25 the Bureau is working with LocalIQ to outsource the placement and daily management of Google Ads. The Bureau staff works with the LocalIQ team to monitor and make adjustments to ad campaigns on a monthly basis.
- ◆ Social campaigns, both carousel ads and reels, will realign to match-up with all integrated efforts to saturate messaging in target markets. In addition, the Digital Marketing Manager will continue to align organic social content with paid efforts. A new "What the South?" campaign is in the works as engaging brand content on living, playing, and discovering the county. The Bureau will continue to use all social channels to drive visitation to johnstoncountync.org and other landing pages and microsites.
- ◆ Partner with iHeart Radio to place audio ads on the podcast network. iHeart's expertise will allow the Bureau to merge data, personas, and creative messaging to reach very specific podcast listeners in target markets.





- ◆ Work with Expedia, one the web’s biggest travel booking sites, to place digital marketing content and ads in the fall and spring. Digital banners and mobile ads will appear across Expedia.com and their partner sites directing interested travelers to a unique landing page promoting JoCo and booking with area hotels.
- ◆ As high-quality video content becomes more central to the travel decision-making process, and TV advertising becomes more affordable, DMOs are trying OTT, or Over-the-Top advertising. This is video advertising across streaming platforms and devices. The Bureau will use a company called MNTN to place high-quality streaming video commercials.

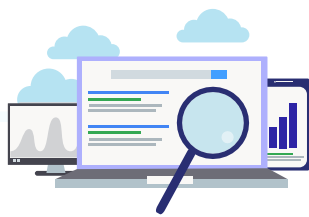
Placement & Timing

Following the guidelines of marketing plan integration a content schedule has been created to plan and track the placement and timing of each campaign and its individual components. The schedule is arranged by month (broken into quarters) and by medium (print, sponsored content, video, etc.). The major campaigns of Q1 and Q2 include Hiking through History (Bentonville), Hollywood History (Ava), and Holidays in JoCo. The major campaigns of Q3 and Q4 include shopping, the BWST passport, and Spring exploration.

Measurable Objectives

- ◆ It is important to use the new tools available to the Bureau to maximize marketing efforts, such as using website analytics to measure engagement, web clicks, and reach on top performing pages. In addition, Placier.ai reports will be used to gauge how data changes after placement. The Bureau will review where website data overlaps with Placer.ai top feeder market data to adjust integrated marketing campaigns.
- ◆ In addition, this data will be used to see if the target advertising initiatives move the needle on conversions set up in the new Google Ads campaign with LocalIQ, as well as targeted social campaigns - both aligned with the integrated campaigns. Staff will continue to monitor ROIs and the seasonality of the visitor market to adjust the spend if needed.

Johnstoncountync.org Web Traffic:



Google simpleview	23-24 FY	24-25 FY	Increase Goal	24-25
Sessions	72,3015	85,5968	10%	941,565
Engagement Rate	61.97%	70.03%	10%	77.03%
Avg. Time per Session	50.56 sec	51 sec	5%	53.55 sec

Act-on Email Open Rates (with 10% Increase Goal):



act-on	23-24 FY Open Rate	24-25 FY Open Rate	23-24 FY CTR	24-25 FY CTR
Event Emails	36.50%	40.18%	5.06%	5.57%
Insider Emails	45.48%	50.03%	2.96%	3.26%
TDT Emails	43.25%	47.58%	2.97%	3.27%



3% Tax Revenue Comparison Chart:

MONTH	2022-23 Actual	2023-24 Actual	2024-25 Projections
July	\$105,191.80	\$120,080.28	\$110,000.00
Aug	\$121,420.39	\$111,679.63	\$110,000.00
Sept	\$86,670.76	\$98,566.07	\$105,000.00
Oct	\$104,807.30	\$105,815.91	\$110,000.00
Nov	\$119,981.42	\$95,644.65	\$100,000.00
Dec	\$92,862.83	\$90,998.17	\$95,000.00
Jan	\$82,329.53	\$85,516.80	\$90,000.00
Feb	\$88,936.12	\$92,085.99	\$96,000.00
Mar	\$120,683.31	\$127,523.67	\$125,000.00
April	\$111,728.54	\$116,328.94	\$115,000.00
May	\$114,891.96	\$120,776.52	\$120,000.00
June	\$129,710.49	\$129,710.49	\$125,000.00
	\$1,279,214.45	\$1,294,727.12	\$1,301,000.00

Group MARKETING

North Carolina, plus mid-atlantic and southern states continue to be the largest feeder states for group business to the county. Historically, partner involvement has been critical for direct sales calls to meeting planners in Raleigh and sales missions to motor coach companies in Virginia. However, COVID-19 drastically affected the way the group market plans and books travel. In FY25 the Bureau is ready to shift efforts to bring more group business to the county.



Defining the Group Market

Group market segments include motor coach, small meetings (fraternal and corporate), weddings and reunions, as well as sports tournaments/events.

Many motor coach companies work directly with hotels, restaurants, and attractions; meaning it is even more important than ever that the Bureau works with partners to service those groups.

Other marketing efforts include direct mail, email marketing, and a return to in-person trade shows for the motor coach market including the NC Motor Coach Association. In addition, leads will be generated through partnership with VisitNC.

Renewed efforts for motor coach marketing includes: quarterly emails, quarterly direct mail postcards, new itineraries, partnership with Old North State Food Hall group tour catering, and returning to direct sale missions.

In previous years the Bureau has looked to the future of the meetings market, preparing to market the area to larger groups once facilities under development were completed. Currently, no hotel projects including ballroom space and conference center

plans discussed with developers are moving forward. The focus this year will be to work with current venues to primarily book local events, weddings, and small corporate meetings.

The weddings market continues to grow in the county with three additional facilities opening in the county in FY25. The focus of the Bureau will be to support venues and service partners through low-cost promotional efforts (web and social), as well as providing services to brides such as hotel blocks and welcome bags. This includes other familial events like reunions.

The Bureau team continues to plan and host the Johnston County Recreation & Sports Council in order to maintain relationships for sports tournament bids and services; this will continue to be the strategy with sports tourism. Due to the residential growth in the county, parks & recreation departments have high demand for residential programming with few openings for outside tournament bookings. The chance to be proactive for tournament bids remains low, however, the Bureau will continue servicing sports groups that are in the area.



Tactics

- ◆ Increase the use of email marketing and email automation via Act-on to reach meeting planners, brides, reunion planners, and sporting event planners during the search phase of finding space for events.
- ◆ Host bi-annual hotel partner meetings to exchange information on packaging and sales efforts, as well as sales missions conducted by the Bureau available to partners.
- ◆ Partner with Live@ The Rudy and send staff to attend the NC Motor Coach Association show in August. In addition, send Christmas in July email blast for the Live@ The Rudy Christmas show dates.
- ◆ Use the JCVB Linked in page to push out information on Johnston County as a meeting destination.
- ◆ Keep the content in the digital sports facility guide updated. Continue to update listings of facilities with the NC Sports Association.
- ◆ Find a sports venue partner that can attend TEAMS and Connect Sports with the JCVB sales staff when there is a partner interested in pursuing tournaments.
- ◆ Consider marketing to planners with non-traditional sports now gaining in popularity: quidditch, flag football, corn hole, pickleball, e-sports, and disc golf.
- ◆ Work with GALOT on the drag race events to better market the facility. Create a segmented email list through Act-on for motor sports.

- ◆ Meet with the planners of the 3 Little Pigs Triathlon to see how this sporting event can grow and showcase the area for other sporting events.
- ◆ Reach out to key tournament level golf courses to see if more tournaments could be held in Johnston County; invite golf course operators to attend a Recreation & Sports Council Meeting.
- ◆ The CycleNC bid for the Town of Benson as an overnight stop on the 2024 Mountains to Coast Ride was accepted; work with the town to service the event and maintain good relations with NC Amateur Sports for future bidding.

Measurable Objectives

- ◆ Set and execute new sales call goals for local, regional, and state group travel planners.
- ◆ Work extensively in Simpleview group tours and meeting modules to organize, update, and prioritize the accounts and contacts in FY25.
- ◆ Meet with hotel operators interested in group tours and service 10 groups in FY25.
- ◆ Complete 3 direct sales missions to motor coach companies in NC, SC, and VA.
- ◆ Determine the Top 10 target list of motor coach companies, and make personal calls, with the goal to book 5 trips to the county in FY 25.

Public Relations & ADVOCACY

Public Relations

The Bureau continues to invest in public relations activities to tell the county's destination stories. PR supports all previously discussed initiatives for leisure and group markets. The FY25 public relations initiatives will align with the new integrated marketing campaigns; using Placer.ai data to find and work with traditional media and content creators in the same target markets as paid media efforts.

Tactics

- ◆ Continue regional media outreach missions with CVB partners in Durham and Raleigh, to visit additional markets based on Placer.ai data. Host follow-up regional trips for media and content creators from the previous Richmond and Charleston missions.
- ◆ Conduct desk tops with VisitNC in offered media markets which overlap with Placer.ai data. Host follow-up media trips and site visits with the VisitNC team whenever assignment aligns.
- ◆ Work with additional and new content creators to increase our reach on TikTok and Instagram matching paid and organic content efforts.
- ◆ Weekly press releases and BLOG posts to support all leisure and group campaigns.
 - ◆ Attend the following media outreach missions:
 - ◆ State Media Mission, VisitNC - October 2024, Durham
 - ◆ IMM (Int'l Media Marketplace) - January 2025, New York City
 - ◆ VisitNC 365 Media Roundtable - April 2025, Hickory, NC
 - ◆ Travel South Global Week - April 2025, Louisville, KY



Measurable Objectives

- ◆ Host at least 10+ media and/or content creator visits to the county.
- ◆ Place at least 20 Bureau-generated articles in national or international publications and generate over \$10 million in earned media impressions.
- ◆ Critical Mention chart - FY24 top 5 earned media stories. Goal for FY25 based off of that, with high potential for 160th Reenactment placements.
- ◆ Clean-up and organize the PR contact database in Simpleview to streamline and improve media outreach.
- ◆ Take the Partner Pitches idea to the next level with VisitNC and as a new way to pitch the media the state works with to include Johnston County.



Advocacy & Community Relations

The Bureau continues to work on strengthening relationships with residents and partners in the county. In previous years the Bureau launched both a Tourism Does That?! newsletter and video, as well as a campaign of community awareness. Continue to take steps towards educating stakeholders on the importance of tourism to the county's economy and the Bureau's role in marketing the destination.

Tactics

- ◆ Complete a resident survey to gauge local knowledge of tourism assets in the county and the importance of the tourism industry in JoCo.
- ◆ Continue monthly Tourism Does That?! newsletter to explain the mission and activities of the Bureau to local leaders and elected officials.
- ◆ Print an Annual Report and distribute to elected officials, tourism partners, and for use at local speaking engagements.
- ◆ Use the JCVB LinkedIn page to reach more professional contacts in-market and statewide on the activities and accomplishments of the Bureau.
- ◆ Provide Visitor Spending business cards as a tool for Tourism Authority Board members to hand out to community members.
- ◆ Continued participation by Bureau staff in community tourism related non-profits: Friends of Bentonville Battlefield, Ava Gardner Museum, Clayton Piano Festival, Friends of Johnston County Parks, Benson Art Advisory Board, and JoCo Grows Agriculture.



Measurable Objectives

- ◆ Build Tourism Does That?! email list to 2,500 recipients.
- ◆ Book 10 speaking engagements with professional organizations and civic club meetings.
- ◆ Hold quarterly (4) meetings with all PIOs (or related positions) from county agencies and towns to maintain an open line of communication and build relationships.
- ◆ Have the National Tourism Week proclamation read and adopted by the County Commissioners at the April 2025 meeting recognizing the importance of tourism in the county.

Visitor SERVICES

Leisure visitor services are provided in the Visitor Center, assisting visitors with directions and local information as well as brochures, maps, and coupons. The goal is to provide timely visitor services upon request in person and over the phone. The staff works to be knowledgeable of all attractions, shopping, dining, and events to represent the destination and fulfills online requests for brochures and guides.



Defining Visitors Services

The Bureau designs, prints, and distributes multiple guides to promote the destination and for visitor in-market use. Including but not limited to: Official Johnston County Visitors Guide, You are Here Smithfield Map, JoCo Bike Routes, Geocaching Brochure, Girls Weekend Rack Card, Smithfield Walking Tour Guide, and Downtown Benson Map.

The Bureau also manages and maintains the content on johnstoncountync.org, as well as various microsites: visitbenson.org, visitclayton.org, visitfouroaks.org, visitkenly.org, visitpinelevel.org, visitprinceton.org, visitselma.org, visitsmithfield.org, avagardner.org, 301endlessyardsale.com, and jocogrows.org. These sites provide travel-related content and information to visitors and residents alike.

Tactics

- ◆ Visit NC's 1-800-Call Center and the I-95 Welcome Centers throughout the year to stay top-of-mind with frontline staff.
- ◆ Host Welcome Center staff in-market for tours of new tourism attractions and as guests for special events as mini-fams.
- ◆ Service all events in FY25 as requested by planners and to support the sales department efforts as needed.
- ◆ Distribute leisure marketing brochures to the 100+ racks in Johnston County, as well as the NC Welcome Centers. Find a way to distribute brochures to AirBnB guests in the county.
- ◆ Engage visitors staying in area campgrounds to seek out "things to do" while camping in the area.



Measurable Objectives

- ◆ Build the JoCo Hospitality Association membership to 50 members.
- ◆ Have at least 5 partners attend Welcome Center visits for National Tourism Week.
- ◆ Plan and host the NC Welcome Center Managers for a FAM trip to Johnston County in FY25.
- ◆ Host two guest speakers for the Hospitality Association as educational and engaging partners in the organization.



- ◆ Support the Johnston County Angel Tree project, working with tourism industry partners and hosting an open house in December 2024 to collect items.
- ◆ Send monthly emails to tourism partners to keep up with brochure distribution using Act-on automation.
- ◆ Order swag items as needed such as 2025 calendar strips, band-aid holders for sports tournaments, and any new promotional items to represent the destination.

The Bureau recently hired a new staff member, Christina Arena, as the Visitors Center Assistant. Christina will maintain the county events calendar, handle visitor inquiry calls and mailings, and greet visitors coming into the JCVB offices and Visitors Center. Christina is originally from Pennsylvania and as a military spouse relocated to NC 15 years ago. She has been in Johnston County for 7 years now and is looking forward to learning more about JoCo's growing communities.

Destination DEVELOPMENT



What's under development for 2024-25?

More development is on tap for the Downtown areas of Clayton, Benson, Four Oaks, Kenly, Selma, and Smithfield. Many Downtowns continue to work on transportation, parking, and appearance plans including murals, facade grants, alley projects, and flowers.

In 2024, the NC Legislature approved a 2% Room Tax for the towns of Four Oaks and Clayton, which is dedicated to marketing each town. At the time of writing this marketing plan, Clayton's tax has been implemented, however Four Oaks' is yet to be.

Phase One construction starts soon at the first ever county park in the Cleveland Community. The county's Open Spaces Dept. is also working on feasibility studies to address route completion for the Mountains to the Sea Trail and East Coast Greenway in the county, as well as a county-wide trails and bike transportation master plan.

Selma's Eastfield Commons project will open the first round of big-box retail stores by the end of 2024 with additional phases set to open in 2025 and future phases under development to include three hotel projects.

In FY25 two new hotels will come online: Benson's Holiday Inn Express and Smithfield's H2 (Hilton) long-term stay property. Eastfield Commons hotel property should break ground on a Springhill Suites Q1, 2025, and a Marriott extended stay property is slated to build on Equity Drive in Smithfield.

The Town of Smithfield continues to move forward on plans to build a new soccer complex on Hwy 210 with the construction design-build drawings to be completed in 2025.

The Johnston County Heritage Center continues the work on the Freedman's School renovation project in Downtown Smithfield, but at this time no completion date has been set. An additional 5 Heritage Trail markers are also under development via the Heritage Commission, bringing the total in the county to 20.

Partnerships with the Friends of the Mountains to Sea Trail, Friends of Johnston County Parks, and Bentonville Battlefield State Historic Site are working to develop more "nature meets history" trails through state funding; continuing to add to the 6+ miles of trails currently at the site.



The State Legislature budgeted \$700,000 for Bentonville Battlefield to build a maintenance building and two additional driving pull-offs in the next 24 months. The Bureau will be the sub-grantee with the County Finance office to manage the project payments with the NC Department of Cultural Resources.

Starting in the Fall of 2024, the Tobacco Farm Life Museum in Kenly will officially be managed by the NC Department of Natural and Cultural Resources, umbrellaed under the group of state owned and operated museums.

Grants Updates

The Bureau remains committed to investing in tourism related development projects throughout the county as the destination continues to grow. This includes visitor-facing infrastructure, assets, and festivals in the county. The Bureau’s procedures to maximize the grants awarded were reviewed during the most recent budgeting season with some needed revisions to the guidelines.

Matching Marketing Grants

The Special Projects Committee increased the grant amount for major festivals (defined as having attendance over 10,000) to \$3,000, and for all other community events of any size the grant amount was raised to \$1,000. This increased the adopted budget line item to \$50,000 in FY25.

Capital Grants

The Tourism Authority approved \$218,810 in the FY25 budget for new investment in tourism-related capital projects to benefit residents and visitors. Funds utilized for the Capital Grant Program are from the 3% room tax paid by visitors staying in local hotels, bed & breakfasts, and cabins in the county. Over the past 37 years of the grants program more than \$2 million has been awarded to tourism-related projects in the county.

The FY 24-25 Capital Grant recipients are:

- Johnston County Heritage Center – Conservation grant - \$10,000
- Johnston County Heritage Center – Historical markers - \$7,500
- Town of Pine Level – Bleachers for Sam Godwin Park - \$5,000
- Town of Archer Lodge – Trash receptacles for park and town - \$5,000
- Clayton Chamber of Commerce – Interior/exterior paint and mortar repair - \$15,000
- Town of Benson Parks and Rec – Wireless scoreboards for PK Vyas Park - \$12,500
- Ava Gardner Museum – Conservation grant - \$10,000
- Ava Gardner Museum – Fire suppression system/Theater exhibit casework - \$50,000
- Bentonville Battlefield State Historic Site – Flowers Farm driving tour stop - \$50,000
- Town of Kenly Parks and Rec. – Trail repair and replacing aging infrastructure - \$24,810
- The Clayton Center – Replace carpet in conference rooms - \$24,000
- Clayton Rugby Football Club – Install lighting for Wilson’s Mills town park - \$5,000

Visitors Bureau MANAGEMENT

The Bureau is committed to investing in the professional management of the Bureau and providing educational opportunities for staff as a key initiative for the long term viability of the organization. The JCVB staff will continue to master the resources and knowledge base available with the Simpleview CRM and CMS; now including continuing education on how best to use the Act-on email platform. The Bureau marketing team will continue learning about how AI is changing the way people plan, book, and experience travel and how DMOs will be using it for destination marketing.

The Tourism Authority Retreat will be held in the spring of 2025, and at that time an update on new directions for the Strategic Plan should be adopted. Top consideration for the next 2-3 years is the commission of a Destination Development Plan for the county as the county faces major tourism-related growth in hotels, recreation, transportation, and setting a path to secure conference space and family entertainment venues in the destination. Also important for any destination plan should be the sustainability of the natural resources in the county, and the continued work with organizations such as the Triangle Land Conservancy.

Tactics

- ◆ Continue the Bureau's progress on the 2023-25 Strategic Plan and create a report for the tourism authority, setting goals on completing remaining projects.
- ◆ Sign up for any/all educational webinars on topics helpful for staff training and development.
- ◆ Continue memberships with Destination International, NC Travel Industry Association, NC Restaurants and Lodging Association and add a membership with US Travel Association.



- ◆ The following staff education and programs are scheduled for FY25:
 - ◆ NCTIA Tourism Leadership Conference, Fall 2024, TBA
 - ◆ DI Marketing & Communications Summit, February 2025, Austin, TX
 - ◆ VisitNC 365 Conference, April 2025, Hickory, NC
 - ◆ PRSA Travel + Tourism Conference, June 2025, Tampa, FL

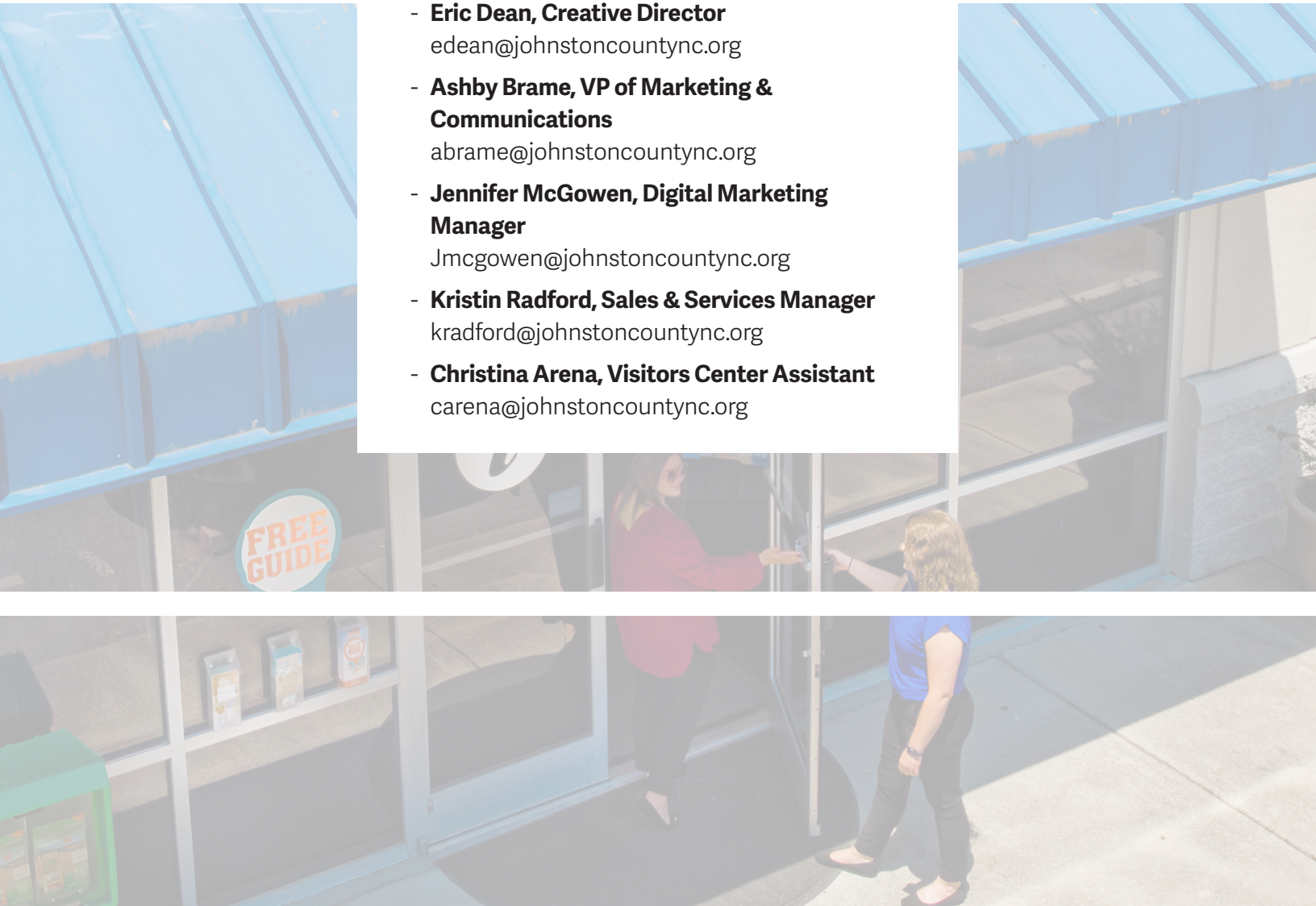
Measurable Objectives

- ◆ Complete cross-training in sales and develop a long-term staff and succession plan for the Bureau.

VISITOR - Johnston County CENTER

JCVB Staff

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Budget PLANNING

The long-forecasted recession finally hit, affecting Q3 and Q4 of the 23-24 FY with a mild downturn in the levels of travel typical for the Spring and Summer season. With domestic travel numbers down and the U.S. in stiff competition for international travel, budget predictions continue to be conservative.

The Holiday Inn Express hotel project in Benson will open in October, 2024, with Smithfield's H2 Extended stay property following in the Spring of 2025. However, as a rule for budget planning the Bureau does not count hotel room taxes for "projected" opening dates as many events can delay construction. It is a conservative approach not to budget future dollars in the actual budget.

The FY24 revenues ended up 1.2% over revenues for FY23, the budget revenue projections for FY25 are similarly conservative considering the unknown length of the current recession and the unknown construction timeline for hotels in development.

Several travel trends are affecting the hotel market share in Johnston County as compared to top competitors in Fayetteville and Rocky Mount. Johnston County's accommodations are primarily economy class with several "roadside" motor court motels remaining from the 1960s when I-95 opened in NC. Placer.ai reported that economy chains, those offering the most basic accommodations at the lowest prices – saw visits down 24.6% in Q2 2024 compared to pre-pandemic reports.

The recession has affected the lower income traveler the most, and therefore the traveler most likely to stay in these economy class hotels. In Johnston County, we have seen a trend for these roadside motels to become weekly and monthly rentals for apartments for families. This has taken rooms out of inventory for visitors, reduced taxable revenues for state, local, and room tax collection.



Also affecting revenues for FY24 was the construction crews for Eastfield Commons contracting with hotels in Selma for long term stays, which is also reducing taxable revenues for state, local, and room tax collections. This has had and will continue to impact the Town of Selma's 2% room tax collection and budget.

The tourism industry in the county has faced and will continue to deal with major road construction from I-40 east of Raleigh, and all along I-95 from Fayetteville to Benson with road widening projects, bridge replacements, and the I-540 Toll Road construction. These conditions are not safe or attractive for visitors trying to navigate where to stop for hotels, dining, and shopping. These transportation disruptions will be a factor to mitigate for another 12-24 months.

2024-25 Budget

REVENUES

3% Room Tax	\$1,300,000
2% Town Room Tax	795,420
Miscellaneous Revenue	363,120
Investment Income	50,000
JoCo Grows Funds	100,000
TOTAL REVENUE	\$2,608,540

EXPENSES

Human Resources

Salaries	\$594,100
Fringe Benefits	201,000
Total HR Expenses	795,100

Operations

Office/Equipment/Building	\$354,810
Travel and Trade Shows	40,000
Printing	32,000
Advertising and PR	317,000
2% Town Projects	695,820
JoCo Grows Expenses	100,000

Grants

Grant Expenditures	273,810
Total Operating Expenses	1,813,440

TOTAL OPERATING & HR EXPENSES

\$2,608,540



simply enjoy the journey.

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