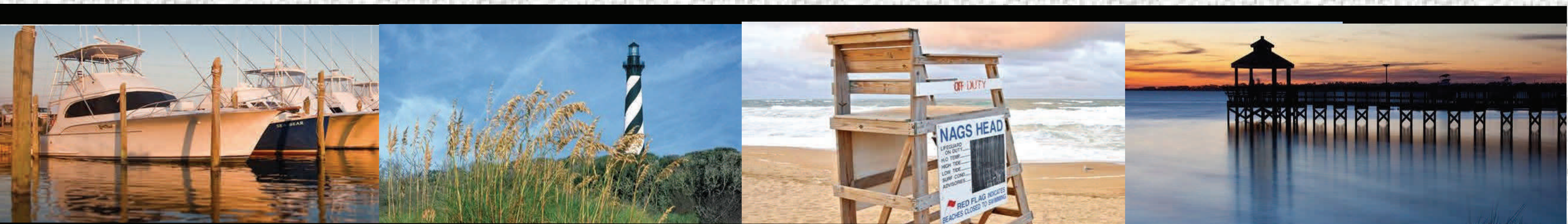
The Outer Banks®
OF NORTH CAROLINA

Visitor Survey
2014-2015
The Outer Banks Visitors Bureau



Volume 1
Visitor Survey Report

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Visitor Survey
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The Visitor Survey Report was prepared for the Dare County Tourism Board (doing business as the Outer Banks Visitors Bureau), which is the lead marketing and promotional agency for The Outer Banks of North Carolina. The primary mission of the Dare County Tourism Board is to increase overnight visitation of leisure, business and other group travelers to Dare County's Outer Banks with particular attention given to less-than-peak months.

This study made possible through the Outer Banks Visitors Bureau's funding mechanisms, including the one percent of the occupancy tax and one percent of the prepared meals tax collected in Dare County. The goal of this study has been to develop an in-depth profile of the Outer Banks visitor to be used in future marketing planning and development. The report is based on a year-long survey of visitors to the Outer Banks.

The Outer Banks Visitors Bureau would like to thank the many visitors and tourism stakeholders in the Outer Banks area who provided their views for this project.

The findings, interpretations, conclusions and ideas expressed in this document were compiled by MAI in the Outer Banks, Washington D.C., and Virginia. They do not necessarily reflect the views of the Board of Directors of the Outer Banks Visitors Bureau. *Project team:* Arthur L. Smith, Principal; Woodrow O. Wilson Jr., Project Manager; Douglas Frechtling, PhD; Liz Noel; and Michelle Langley; Surveyors - Howland Delo, Tina Bradley and Ed Beckley.

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1 EXECUTIVE SUMMARY

Tourism is the largest industry in The Outer Banks, and one that is still growing. Visit North Carolina, a unit of the Economic Development Partnership of North Carolina, reports that tourism in Dare County exceeded $1 billion for the first time in 2014. Sustaining – and growing – a tourism program of this magnitude requires constant attention, and ongoing investment in marketing, infrastructure, and human resources. Targeting tourism investments in turn requires a detailed understanding of a destination's visitors, their interests, and how they perceive their experience. Visitor feedback, both positive and negative, can help tourism planners and managers make informed decisions about their investments and priorities.

The Outer Banks Visitors Bureau, recognizing the need for objective, current data about visitors to The Outer Banks, commissioned a one-year survey of visitors. The intent of the survey is to provide insights into who is visiting The Outer Banks, why they visit, what they did while visiting, what they spent, and how they evaluate their experience. In addition, the year-long duration of the survey will allow comparisons by season, or even by month, to inform future tourism initiatives.

This survey, conducted by Management Analysis, Incorporated (MAI) of Vienna, VA, collected qualifying responses from 11,183 visitors over the period April 2014 to May 2015, using both visitor-intercept and on-line surveys. Some of the key findings include:

- Visitor satisfaction is very high, and has been sustained at that level from The Outer Banks' previous survey in 2006
- Although still very positive, upper income level visitors are less satisfied with restaurant and night-time activity options than other age groups
- The majority of visitors (64 percent) are repeat visitors, and the average repeat visitor is making their sixth trip to The Outer Banks
- More than 93 percent of visitors are in The Outer Banks for pleasure/vacation
- Ninety-five percent of visitors stay for one or more nights; only five percent come for the day only
- The average duration of stay for those visitors who stay overnight is 5.8 nights
- The average party size is 5.4, varying from a high of 6.6 in the summer months to a low of 3.4 in the winter

- Many non-summer visitors are frustrated by the number of closed attractions, inaccurate posting of store and restaurant hours, etc. A program should be considered to encourage more spring and fall visitation.

This report is provided in three parts. This volume, Volume 1, provides the narrative summary of the survey findings. Volume 2 provides a more detailed graphic presentation of findings. The third component is the database of survey responses, which can be used by The Outer Banks Visitors Bureau to perform further ad hoc analyses as the need is identified.

2 INTRODUCTION

Tourism is the largest industry in The Outer Banks, and one that is still growing. Visit North Carolina, a unit of the Economic Development Partnership of North Carolina, reports that tourism in Dare County exceeded $1 billion for the first time in 2014. This makes Dare County the fourth largest county in the State in terms of tourist revenues, after Mecklenburg, Wake, and Guilford counties.

Sustaining – and growing – a tourism program of this magnitude requires constant attention, and ongoing investment in marketing, infrastructure, and human resources. But investment capital is hard to obtain. Advertising is expensive, and with finite funding for promotion, marketing must be targeted to the most productive and receptive market segments. Infrastructure spending must be focused on the most promising opportunities – or on solving the most pressing problems.

Targeting tourism investments requires a detailed understanding of a destination's visitors, their interests, and how they perceive their experience. Visitor feedback, both positive and negative, can help tourism planners and managers make informed decisions about their investments and priorities.

The Outer Banks Visitors Bureau, recognizing the need for objective, current data about visitors to The Outer Banks, commissioned a one-year survey of visitors. The intent of the survey is to provide insights into who is visiting The Outer Banks, why they visit, what they did while visiting, what they spent, and how they evaluate their experience. In addition, the year-long duration of the survey will allow comparisons by season, or even by month, to inform future tourism initiatives.

This survey, conducted by Management Analysis, Incorporated (MAI) of Vienna, VA, collected qualifying responses from 11,183 visitors over the period April 2014 to May 2015, providing a confidence level of 95 percent ± 2.0 percent for the overall study. Conclusions drawn for subsets of the data, i.e., for a particular season of the year or a particular category of visitor (e.g., for female visitors, or visitors over the age of 65) are based on smaller samples, and have correspondingly greater margins of error.

The 11,183 responses include 8,508 visitor-intercept surveys, in which visitors to The Outer Banks were approached during their visit and asked if they would complete a survey. The remaining 2,675 responses were on-line surveys completed by visitors who learned of the survey through The Outer Banks Facebook page, by word of mouth, or by the visitor-intercept process (visitors who said they were too busy to complete the survey were given a card with the URL of the online survey).

In general, respondents to the online survey and visitor-intercept survey provided similar responses, except that on-line respondents were more likely to be repeat visitors and thus to have a slightly more favorable view of The Outer Banks than the visitor population as a whole.

In completing the survey, visitors responded to up to 27 questions, many of which allowed or requested multiple inputs. Thus the typical visitor provided more than data points of information about their experience, and the survey as whole obtained more than half a million individual visitor responses. All of this information becomes the property of The Outer Banks Visitors Bureau, in a searchable format, and can be mined for more detailed findings than those provided in this report.

This report is provided in three parts. This volume, Volume 1, provides the narrative summary of the survey findings. Volume 2 provides a more detailed graphic presentation of findings. The third component is the database of survey responses.

3 METHODOLOGY

The MAI team initiated this survey project with telephonic discussions with The Outer Banks Visitors Bureau to begin building an in-depth understanding of the Bureau's survey objectives and unique features of the destination. This was followed by an on-site meeting, with further discussions and a familiarization tour of some of the key Outer Banks attractions.

MAI then prepared a draft survey instrument which The Outer Banks Visitors Bureau reviewed and commented on. Once MAI incorporated these comments, a final questionnaire was ready for testing. This survey form is attached as Appendix 1 to this report. The survey contains a total of 27 questions, the first 18 of which are about the visitors' Outer Banks experience: why did they come; what did they do; how did they like it; and would they return. There are also seven questions relating to visitor demographics and two related to expenses incurred on their Outer Banks visit.

In addition, there are three pre-screening questions, which are meant to exclude participation in the survey by minors (i.e., persons under 18), residents of The Outer Banks (i.e., non-visitors to the area), and persons who work in The Outer Banks tourism industry, and might therefore be biased in their responses.

An on-line version of the final survey was created, using SurveyMonkey. After review to ensure the on-line version functioned as intended and accurately reflected the approved final survey questionnaire, the on-line version was launched. On April 24, 2014, The Outer Banks Visitors Bureau announced the survey on its Facebook page, and invited the public to take the survey. Additional notices were subsequently posted periodically, to draw a broader base of responses.

As the first 300 completed surveys were received, the MAI team closely monitored the results to see if any of the questions were receiving significant numbers of anomalous responses or if large numbers of visitors were skipping any particular questions. Either of these phenomena might indicate that the wording of a question was confusing or unclear to survey respondents, and that the survey should be revised. The review concluded that no significant changes in wording were warranted.

The MAI team then launched the visitor intercept portion of the survey on May 21, 2014. Three survey facilitators, all local residents, began visiting local attractions, asking visitors to take the survey. The facilitators were assigned to a variety of attractions, to include The Outer Banks Visitors Centers, lighthouses, parks, and privately-owned attractions distributed across all three islands in Dare County. For sites not owned by the County, prior permission was obtained from owners and communication with owners maintained throughout the survey process. The mix of sites did vary over the course of the survey, as a number of the sites closed for varying periods of time for the off-season.

Throughout the data collection effort, MAI monitored and compiled the survey results. Periodic reports were made to The Outer Banks Visitors Bureau, and a public presentation of the then-partial results of the survey was made at The Outer Banks Tourism Summit in May 2015.

Both the on-line and visitor-intercept data collection efforts were concluded on May 31, 2015. A total of 11,183 qualifying surveys were received, 8,508 from visitor-intercept surveys and 2,675 on-line. An additional 114 completed surveys were received but excluded from consideration due to non-compliance with the survey parameters. For example, a number of respondents to the online survey indicated that they were 18 or older in response to the prescreening question, which led the software to allow them to complete the survey. However, in their survey responses they indicated that they were not, in fact, 18 years of age. These surveys were discarded.

The table below displays the month of arrival to The Outer Banks for qualifying responses.

Exhibit 1–Month of Arrival for Most Recent Visit

Month	# of Respondents	% of Respondents
January	178	1.6%
February	68	0.6%
March	522	4.7%
April	939	8.5%
May	1,105	10.0%
June	1,341	12.2%
July	2,054	18.6%
August	1,739	15.8%
September	1,430	13.0%
October	1,056	9.6%
November	472	4.3%
December	130	1.2%
Total	11,034	

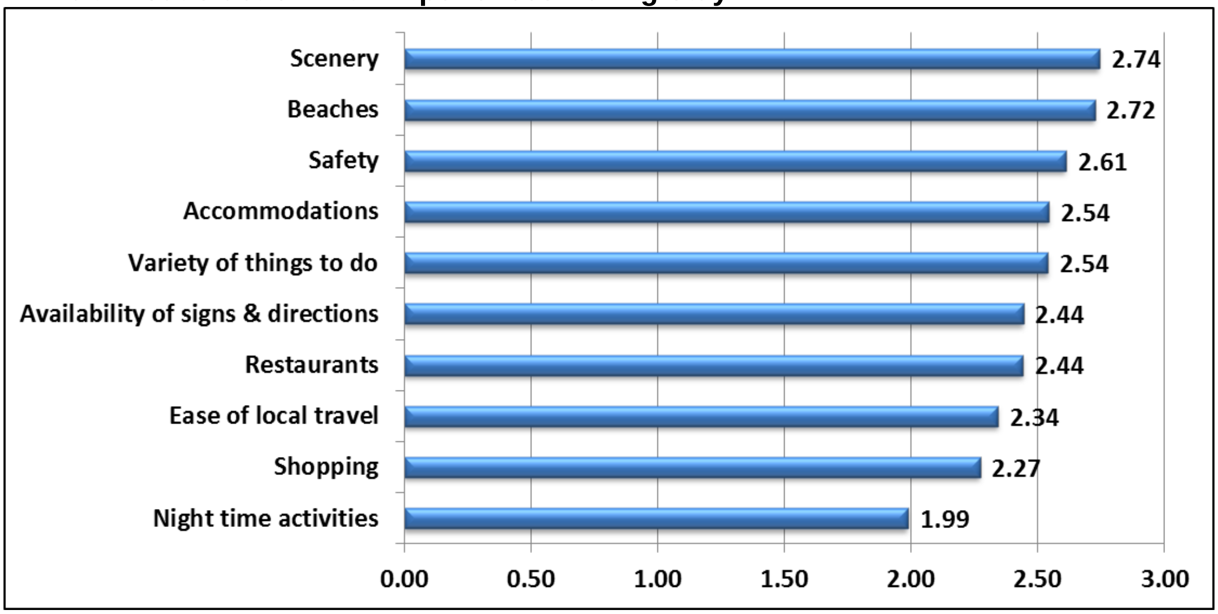
The data from these 11,183 responses was analyzed to produce the findings displayed in this report. It should also be noted that in 149 of the completed surveys the respondents skipped the question on month of arrival. These surveys were used in the overall survey, but excluded from analyses which involved sorting responses by season of arrival.

4 SURVEY FINDINGS

4.1 Visitor Satisfaction

The survey explored visitor satisfaction with their Outer Banks experience by asking them to rate their satisfaction with 10 different attributes or attractions. The scale used was -3 (very dissatisfied) to 3 (very satisfied), with zero representing a neutral value. The annualized satisfaction with experiences is displayed below. Please note that since all of the responses are on the positive side of the -3 to 3 response spectrum, the negative side is not included in the graph.

Exhibit 2–Satisfaction with Experiences During Stay



Note: A “3” represents Very Satisfied, while a “-3” represents Very Dissatisfied.

As can be seen, visitors viewed all 10 aspects of their Outer Banks experience quite favorably, with scenery, beaches, safety, accommodations, and variety of things to do receiving the highest ratings. The lowest average annual rating was received by night-time activities, with a score of 1.99. While this was noticeably below the ratings received by the other attributes, it is not low enough to be considered a problem (1.5 or lower would enter the “problem” range)

Very few destinations receive such uniformly favorable evaluations from visitors. The MAI survey team therefore asked the question: “Can the visitor experience really be this positive?” Fortunately, a useful basis for comparison was available.

The previous Outer Banks visitors’ survey was conducted for The Outer Banks Visitors Bureau in 2005-2006 by Strategic Marketing and Research, Inc. (SMARI). This year-long survey involved 5,290 visitors, and included questions about visitor satisfaction. The scale used by this survey to assess satisfaction was 1 to 4, with 1 meaning “very dissatisfied” and 4 meaning “very satisfied”. Although the 2006 survey and the 2015 survey used different scales, a comparison is possible by converting the results from both surveys to percentages (e.g., 100 percent satisfaction equals a ranking of 4 out of 4, or +3 on the 2015 survey’s scale of -3 to +3). Using this approach, the MAI team compared the six attributes which were included in both the 2006 and 2015 surveys. This comparison is displayed below.

Exhibit 3–Visitor Satisfaction Percentiles

Visitor Satisfaction (Percentile-Positive)		
Attribute	2006 Survey	2015 Survey
Safety	92.5	93.5
Beaches	95.0	95.3
Scenery/Scenic Drives	92.5	95.7
Accommodations	90.0	92.3
Restaurants	85.0	90.7
Shopping	90.0	87.8

As this table demonstrates, the visitor evaluations in the 2006 and 2015 were virtually identical for five of the six attributes measured. Only for restaurants was there a statistically significant difference, with the 2015 survey showing improved visitor satisfaction versus 2006. This consistency supports the conclusion that The Outer Banks offers an exceptionally positive visitor experience, and that this level of satisfaction has been sustained over time.

The next facet of visitor satisfaction explored was seasonal variation. For purposes of this analysis, Spring visitors were those who arrived in March through May, Summer June –August, Fall September-November, and Winter December-February. The following table display seasonal variation by attribute.

Exhibit 4–Satisfaction with Experiences During Stay–Summarized

Satisfaction with Experiences During Stay-Summarized					
Attribute	Spring	Summer	Fall	Winter	Annual
Beaches	2.74	2.74	2.73	2.62	2.72
Scenery	2.69	2.74	2.75	2.68	2.74
Safety	2.63	2.59	2.62	2.61	2.61
Variety of Things to do	2.57	2.55	2.54	2.54	2.54
Accommodations	2.53	2.54	2.53	2.51	2.54
Restaurants	2.52	2.42	2.47	2.48	2.44
Availability of signs and Directions	2.50	2.41	2.46	2.40	2.44
Shopping	2.46	2.28	2.44	2.37	2.34
Ease of Local Travel	2.26	2.17	2.28	2.19	2.27
Night time activities	1.94	2.02	1.96	1.95	1.99

As can be seen, there is very little variation in visitor satisfaction across seasons, although winter satisfaction is slightly lower for most factors. Again, this finding is consistent with the 2006 survey. This indicates that The Outer Banks is a mature destination, and well-understand by most of its visitors.

Visitor expectations vary by season, so that a visitor who comes in winter, for example, is looking for a different experience than a summer visitor, and is not generally disappointed by what they encounter.

The MAI team next considered satisfaction by age group. These results are provided in the chart below.

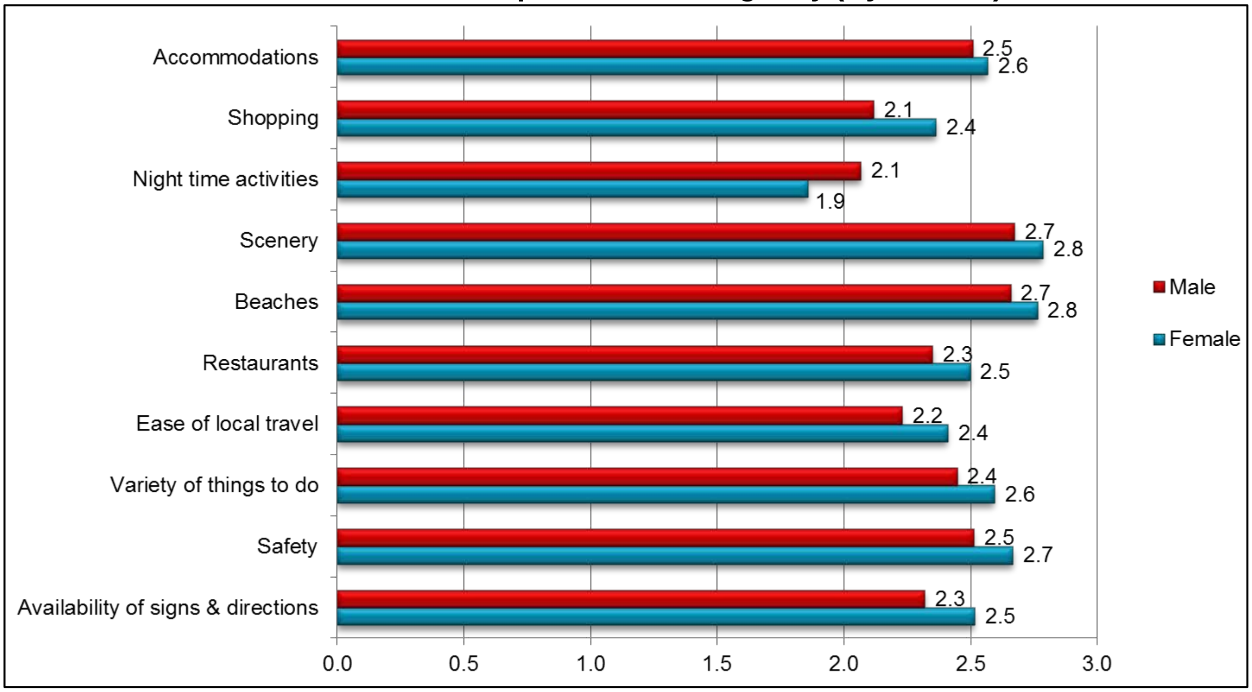
Exhibit 5–Age Related Visitor Satisfaction with Experiences During Stay

Satisfaction with Experiences During Stay - Age Related					
Attribute	18-29 Year Olds	30-39 Year Olds	40-49 Year Olds	50-64 Year Olds	65 Years Old and Up
Scenery	2.79	2.76	2.76	2.73	2.71
Beaches	2.78	2.74	2.75	2.72	2.66
Variety of Things to do	2.53	2.53	2.54	2.54	2.56
Accommodations	2.65	2.53	2.54	2.53	2.55
Safety	2.71	2.67	2.62	2.58	2.55
Restaurants	2.51	2.40	2.42	2.43	2.50
Availability of signs and Directions	2.51	2.48	2.48	2.42	2.36
Ease of Local Travel	2.42	2.39	2.33	2.31	2.32
Shopping	2.31	2.25	2.30	2.25	2.26
Night time activities	1.95	1.97	2.02	1.99	1.92

As can be seen from these graphs, there is relatively little variation in satisfaction across age groups. Some minor distinctions can be made; for example visitors 18-29 and over 65 age groups were the most satisfied with their restaurant experience, and visitors in the 18-29 year-old bracket registered the highest level of satisfaction with their accommodations. However, the differences in satisfaction levels were not great enough to be major influences on visitation decisions.

The next look at visitor satisfaction was a breakout by gender. These results are displayed on the next page.

Exhibit 6–Visitor Satisfaction with Experiences During Stay (By Gender)



Here a clear pattern can be distinguished. Female visitors are slightly more satisfied than male visitors with nine of the ten attributes measured, and overall. The greatest difference was in satisfaction with the shopping experience. The one area where male visitors reported they were more satisfied than female visitors was night-time activities.

Finally, the MAI team looked at satisfaction by income level. This breakout is shown in the following table.

Exhibit 7–Visitor Satisfaction with Experiences During Stay (Income Category)

	$150,000+	$110,000 – 149,999	$70,000 – 109,999	$30,000 – 69,999	Less than $30,000 annually	Retired	Decline to state income
Availability of signs & directions	2.39	2.40	2.46	2.49	2.49	2.40	2.44
Safety	2.54	2.59	2.63	2.65	2.66	2.55	2.59
Variety of things to do	2.47	2.48	2.57	2.61	2.58	2.49	2.52
Ease of local travel	2.18	2.28	2.37	2.43	2.46	2.28	2.34
Restaurants	2.31	2.37	2.48	2.49	2.55	2.44	2.44
Beaches	2.68	2.70	2.73	2.75	2.81	2.67	2.71
Scenery	2.68	2.71	2.76	2.77	2.81	2.68	2.74
Night time activities	1.90	1.86	2.04	2.03	2.13	1.89	1.92
Shopping	2.14	2.18	2.29	2.34	2.37	2.26	2.26
Accommodations	2.49	2.54	2.55	2.58	2.59	2.52	2.54

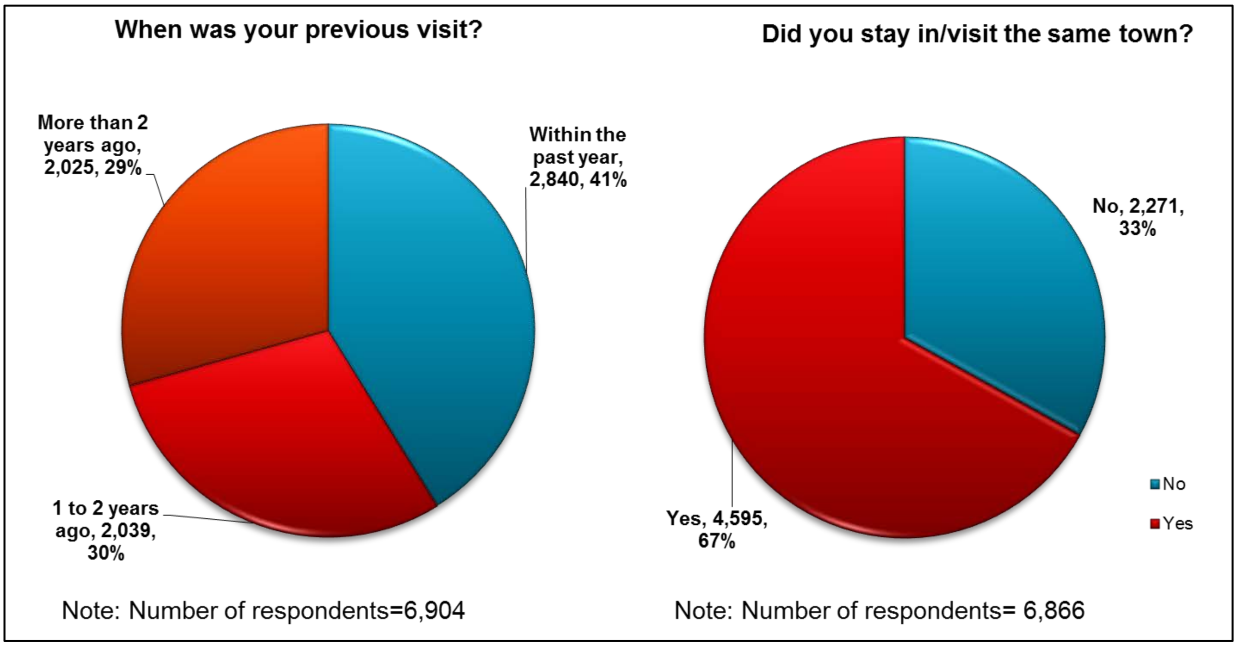
As with most of the satisfaction analyses, there are not large differences between the satisfaction levels of different income groups. However, visitors with family incomes of over $100,000 were slightly less satisfied than the lower income categories, with the largest differences being in restaurants, shopping, night-time activities, and ease of local travel. The first three of these factors may indicate an opportunity for attractions focused on this market niche. The most satisfied income group, by a small margin, was families with an income level of under $30,000.

4.2 Repeat versus First-Time Visitors

Sixty-four percent of visitors reported that they were return visitors, while 36 percent were first-time visitors. By comparison, the 2006 survey found that 41 percent of visitors were first-time visitors, so The Outer Banks would appear to have slightly increased the role of repeat visitors over the past decade.

Of the repeat visitors, the median number of return visits was five (or six visits total). The recency of the immediate prior visit and visitor inclination to return to the same location are displayed below.

Exhibit 8–Return Visit Information



Additional information on return visitors, including seasonal data, is provided in Volume 2.

4.3 Point of Origin

The survey asked U.S.-based visitors to provide their home zip code. This information, which is included in the database provided to The Outer Banks Tourists Bureau by MAI, will allow the Bureau to conduct sophisticated analyses of visitors by region, state, metropolitan area, or county. The following table identifies the top 10 states of origin for visitation, with identification of primary metropolitan markets within each state.

Exhibit 9–Visitors from Top Ten States

Top Ten States	% of Visitors	Metropolitan Areas within States
Virginia	18.5%	Northern Virginia, Richmond, Norfolk/Newport News/Williamsburg
North Carolina	15.8%	Raleigh, Winston-Salem
Pennsylvania	14.1%	Pittsburgh, Harrisburg
Ohio	6.6%	Cleveland
New York	5.8%	Buffalo, Rochester, Central New York
Maryland	5.6%	Baltimore, Washington DC Metro
New Jersey	3.9%	Various towns
West Virginia	2.7%	Morgantown, Wheeling
Florida	2.1%	Various towns
Indiana	1.5%	Indianapolis

Eight of the top ten states for visitation origin are to the north and west of North Carolina; North Carolina itself is the second greatest source of visitors, while Florida is the only state to the south to make the top ten. Together, the top three states, Virginia, North Carolina, and Pennsylvania, account for nearly half of the total visitors.

For purposes of this analysis, Washington, DC was treated as a separate state, and did not make the top 10 states of origin. However, if the Greater Washington Metropolitan Area is viewed as a distinct market, it would rank among the top ten.

This analysis generally produced similar findings to the 2006 survey. However, the Philadelphia, PA market, which accounted for 6.5 percent of visitors in 2006, was significantly less influential in 2015, suggesting erosion of this market, potentially to mid-Atlantic beach destinations which are more easily reached from Philadelphia.

The top five foreign countries of visitor origin are displayed in the following table. None of these markets reached the one percent mark, Interestingly, although the number of Canadian visitation was the greatest, the average length of stay for Canadian visitors was shorter, suggesting that for some of the Canadians The Outer Banks was a stop en route to another destination, such as South Carolina or Florida.

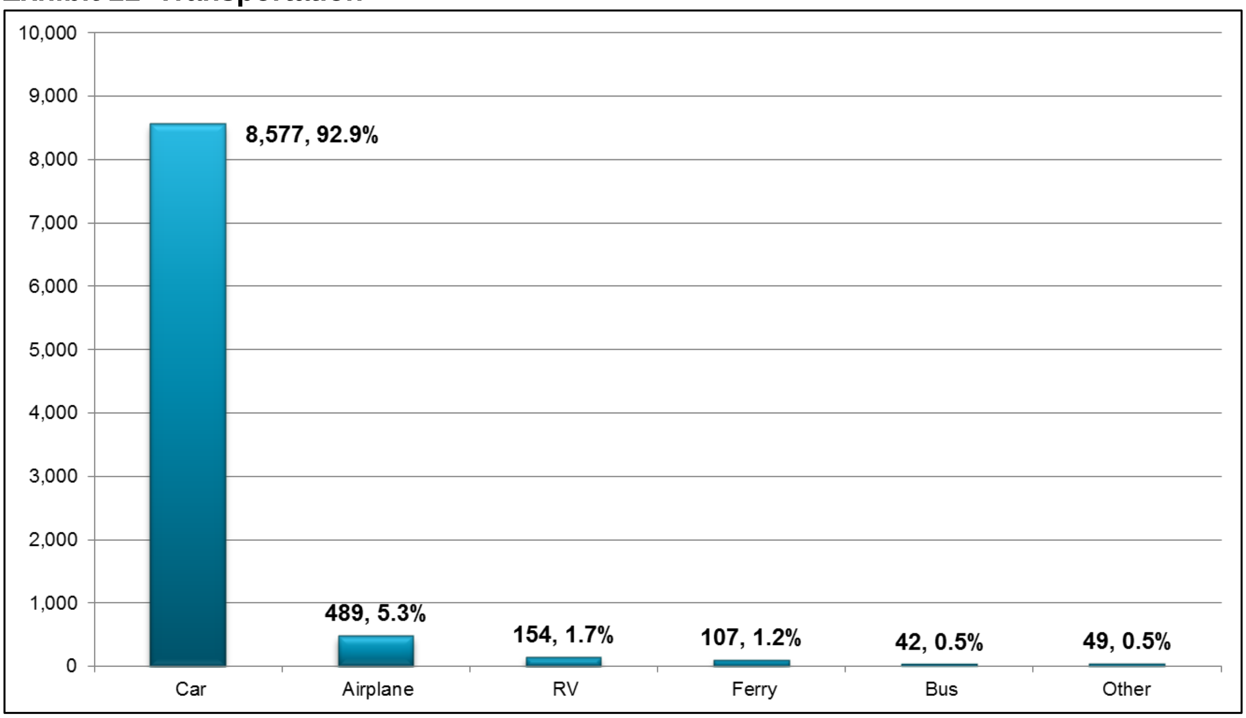
While Switzerland provided the fifth most survey respondents of any foreign destination, this represented only four visitors, and Switzerland’s visitation was not, in statistical terms, significantly greater than that of several other countries.

Exhibit 10–Visitors from Foreign Countries

Top Five Countries Visitors Came From	% of Foreign Visitors
1. Canada	55.3%
2. United Kingdom/England	16.9%
3. Germany	6.8%
4. Australia	5.9%
5. Switzerland	1.8%

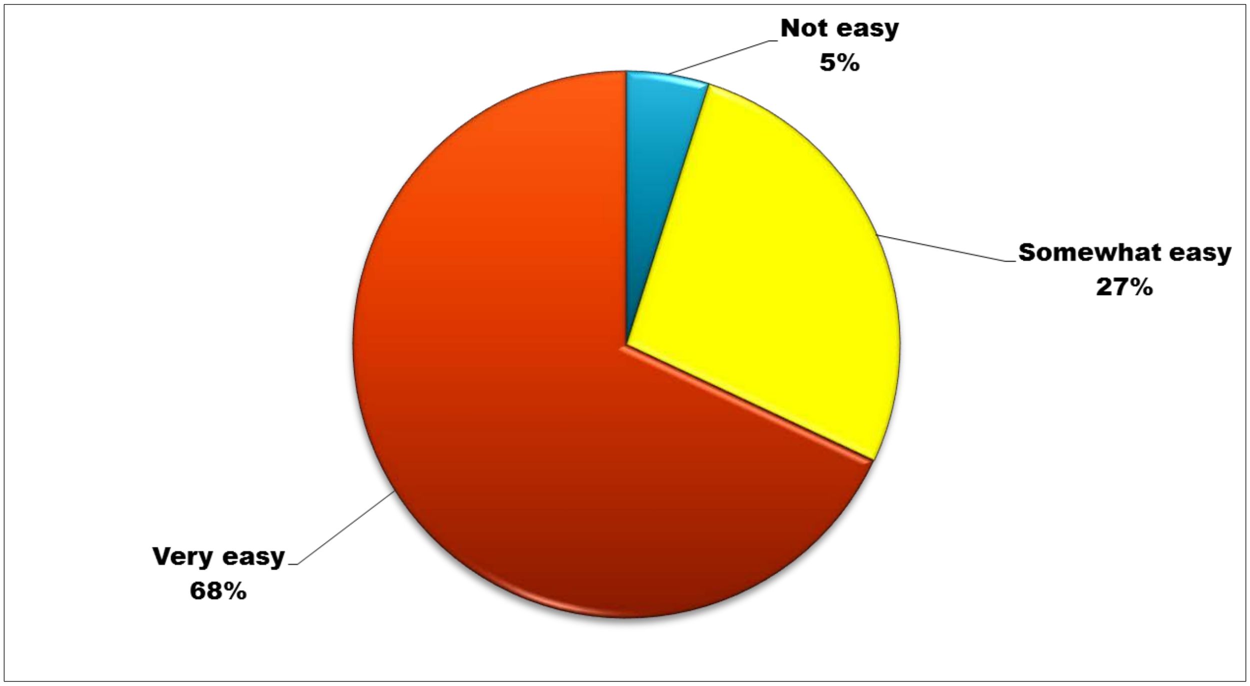
Not surprisingly, the vast majority of visitors arrive by car. As shown in the transportation graph below, nearly 93 percent of visitors come by car; when RVs and other motor vehicles are added, the percentage of visitors who arrived by motor vehicle rose to 95 percent. These figures are virtually identical to the findings of the 2006 survey. In reading this table, please note that respondents could choose more than one form of transport, e.g., car and ferry, so that the total number of responses exceeds 100 percent.

Exhibit 11–Transportation



Ease of access is another important consideration for visitors. Survey respondents were asked to evaluate their ease of travel to The Outer Banks as “Very easy”, “Somewhat easy” or “Not easy”. These responses are summarized below.

Exhibit 12–Ease of Travel



As shown, two-thirds of respondents reported that travel to the Outer Banks was “Very easy”, 27 percent “Somewhat easy” and five percent “Not easy”. By comparison, the 2006 survey, which employed the same three categories, found that 52 percent rated access “Very easy”, 43 percent “Somewhat easy” and 5 percent “Not easy”. Since the mix of transportation modalities has not changed, the improved perception of ease of access indicates that the improvements to road networks, in both North Carolina and Virginia, have made travel to the Outer Banks relatively more attractive over the past decade.

4.4 Reasons for Visiting

Understanding the activities and attractions that appeal to visitors and where visitors get their information about a destination are essential to effective destination marketing and to sustaining and growing tourism revenue. The survey asked visitors to identify their sources of information about The Outer Banks. The results of this question are summarized below; please note that respondents could pick more than one source of information, so the total exceeds 100 percent.

Exhibit 13–Sources of Information

Source	Number of Respondents	Percentage of Total Respondents
I have visited before	6,262	56.0%
Recommended by friends/relatives	4,306	38.5%
Outer Banks website	3,815	34.1%
Travel guidebook	1,689	15.1%
Website of rental company	1,455	13.0%
Facebook page	872	7.8%
Internet ad	651	5.8%
Magazine ad or article	479	4.3%
Other (Please specify):	435	3.9%
Travel agency	264	2.4%
Co-worker/company travel department	261	2.3%
Posters, signs or billboards	138	1.2%
Newspaper	117	1.0%
TV program or ad	98	0.9%
Special promotion or campaign	87	0.8%

The top sources of information were “I have visited before” and “Recommended by friends/relatives”, reflective of The Outer Banks’ high return visitation rate and high visitor satisfaction. The third most cited source was The Outer Banks website, and The Outer Banks Facebook was also frequently cited (sixth in the list).

Visitors were also asked “What attracted you to travel to the Outer Banks?”, and provided a list of 24 possible responses. Respondents could select more than choice, and the average visitor made four selections. These results are shown on the next page.

Exhibit 14–Activities/Attractions that Appeal to You

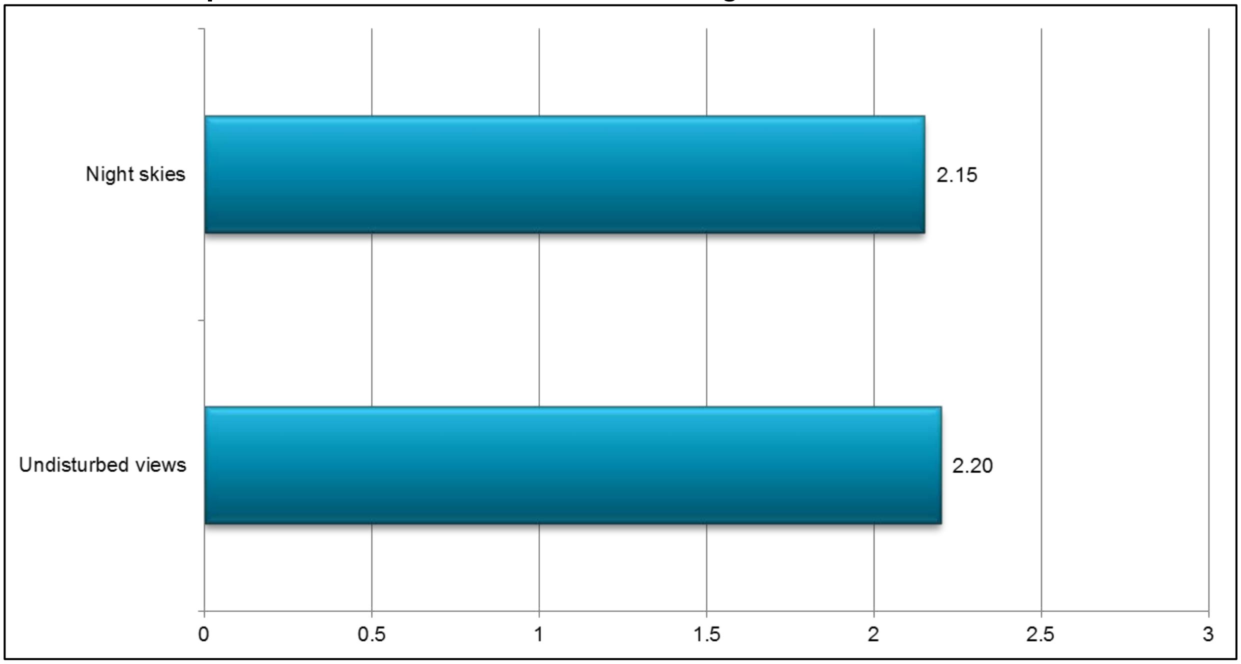
Activity/ Attraction	# of Respondents	% of Total Respondents
Beach, ocean	9,503	86.1%
Lighthouses	5,821	52.8%
Open natural area	5,446	49.4%
Historical sites	4,071	36.9%
Nature activities	2,934	26.6%
Safe place to visit	2,932	26.6%
National Park Service sites	2,375	21.5%
Fishing	2,291	20.8%
Other outdoor activities / recreation	1,783	16.2%
Inexpensive travel cost	1,698	15.4%
Shopping	1,643	14.9%
Visit friends or relatives	1,578	14.3%
Short travel time	1,225	11.1%

Activity/ Attraction	# of Respondents	% of Total Respondents
Water sports	1,163	10.5%
Golf	410	3.7%
Festival or other special event	397	3.6%
Site for a wedding	253	2.3%
Good place for a honeymoon	218	2.0%
Friend or relative's wedding	199	1.8%
Study / educational tour	182	1.6%
Scuba diving	110	1.0%
Business trip	82	0.7%
Competitive sports event	76	0.7%
Company meeting / conference	34	0.3%

As shown, the top activities/attractions annually were: beach; ocean; lighthouses; open, natural areas;, and historical sites. These four activities/attractions were the top four, in the same sequence, in every season of the year. A more detailed season-by-season breakout is provided in Volume 2.

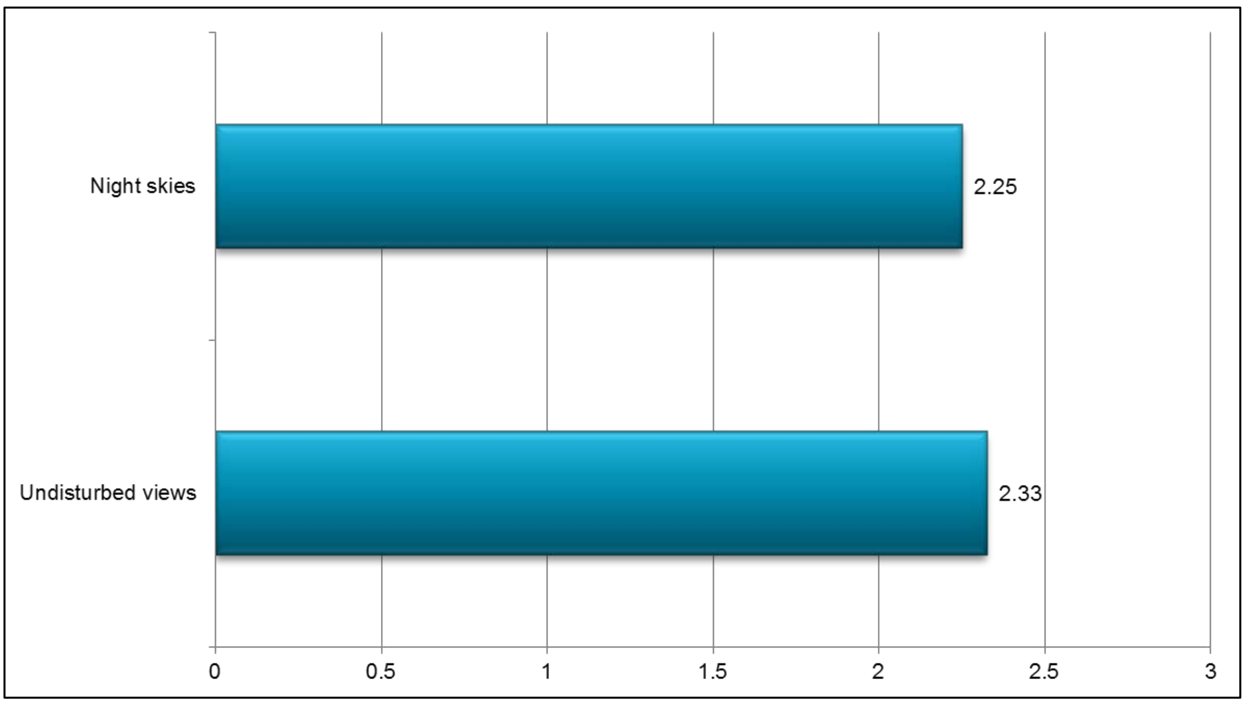
The Outer Banks Visitors Bureau was interested in whether undisturbed views and night skies were important to visitors. To explore this, two questions were asked: "How unique are the undisturbed views and night skies at The Outer Banks?" and "How important are the undisturbed views and night skies?" Visitors were given a scale of -3 (not unique, not important) to 3 (very unique, very important).The results are shown below, which demonstrate that visitors do feel The Outer Banks views are unique, and that this is important to them.

Exhibit 15–Uniqueness of Undisturbed Views and Night Skies



Note: A “3” represents Very Important, while a “-3” represents Not Important.

Exhibit 16–Importance of Undisturbed Views and Night Skies

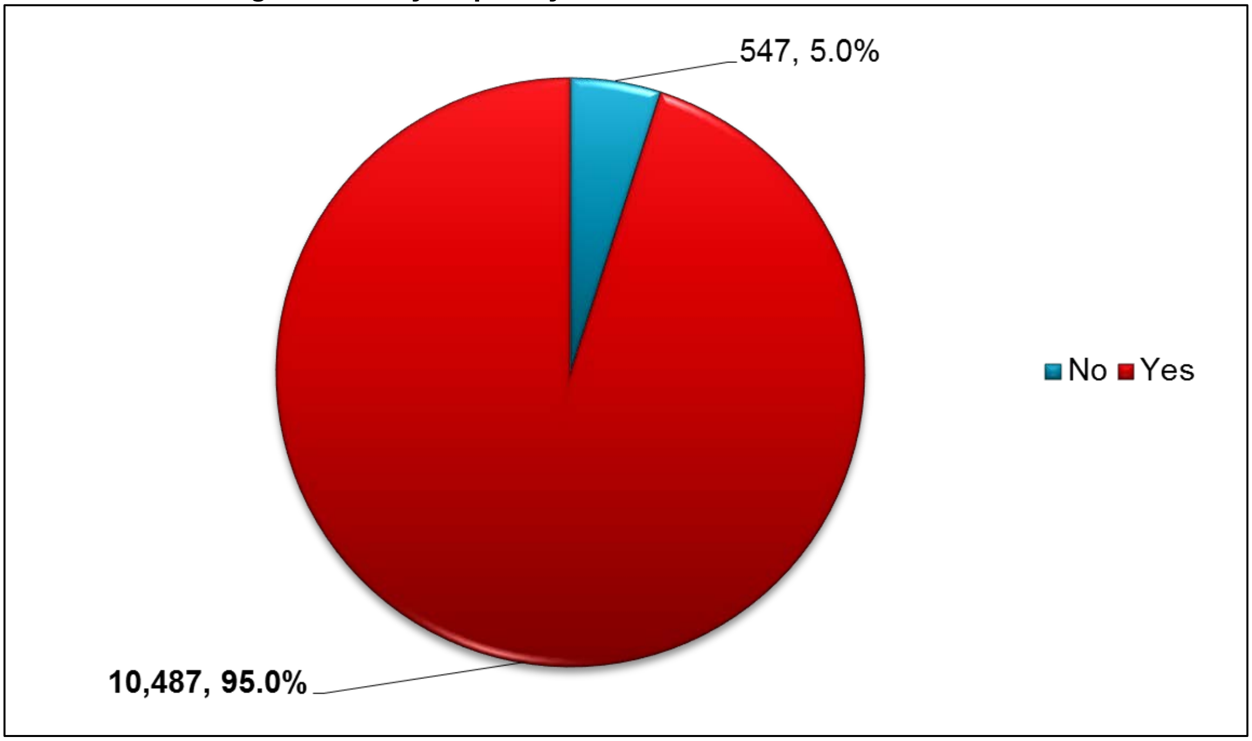


Note: A “3” represents Very Important, while a “-3” represents Not Important.

4.5 Length and Location of Stay

The survey asked several questions related to length and location of stay. The first area explored was the distribution of visitors who drove to The Outer Banks for a day visit, without staying overnight versus those who stayed one or more nights. These results are displayed below.

Exhibit 17–Overnight Visit/Day Trip Only Information



Ninety-five percent of visitors stayed overnight in The Outer Banks, and only five percent made day-trips only. This is an extremely strong result, since overnight visitors will typically make a greater contribution to the local economy. This reflects two factors. The first is the attractiveness of The Outer Banks as a destination, as shown in the visitor satisfaction data. The second relates to The Outer Banks location, in that there are few major population centers close enough to make a day trip practical.

Visitors who stayed overnight were asked which towns they stayed in, and for how many nights. They were also asked which locations they made day visits to during their stay. These results are displayed on the next page.

Exhibit 18–Overnight Stays Summary

Overnight Stays					
Town	Spring March April May	Summer June July August	Fall September October November	Winter December January February	Overall
Avon	777	2,556	1,111	26	4,470
Buxton	351	812	391	15	1,569
Duck	1632	3698	1,476	128	6,394
Frisco	194	960	412	0	1,566
Hatteras Village	485	1,170	683	17	2,355
Kill Devil Hills	1,945	4,581	2,743	363	9,632
Kitty Hawk	1,218	2,359	1,621	212	5,410
Manteo	304	1,006	620	91	2,021
Nags Head	3,113	7,556	3,606	391	14,666
Rodanthe	621	1,464	920	5	3,010
Salvo	195	985	576	0	1,756
Southern Shores	472	1,803	783	26	3,084
Wanchese	17	71	39	7	134
Waves	163	802	558	4	1,527

Exhibit 19–Day Trips Only Summary

Day Trips Only					
Town	Spring March April May	Summer June July August	Fall September October November	Winter December January February	Overall
Avon	363	596	412	23	1,394
Buxton	365	651	435	34	1,485
Duck	590	877	665	72	2,204
Frisco	296	471	333	19	1,19
Hatteras Village	588	964	662	41	2,255
Kill Devil Hills	871	1,458	898	141	3,368
Kitty Hawk	990	1,681	1032	152	3,855
Manteo	828	1,203	821	107	2,959
Nags Head	830	1,364	864	133	3,191
Rodanthe	377	521	401	34	1,333
Salvo	275	408	306	18	1,007
Southern Shores	347	445	395	55	1,242
Wanchese	227	294	50	28	599
Waves	239	359	264	19	881

Another view of the overnight stays is provided by the following chart, which displays the number of respondents who stayed at each of 14 locations in The Outer Banks, the total number of nights stay they reported, and the average number of nights stayed by visitors to each location.

Exhibit 20–Overnight Stays Overall

Town	# of Respondents	Total Nights Spent	Average # of Nights
Avon	653	4,470	6.8
Buxton	357	1,569	4.4
Duck	1,085	6,934	6.4
Frisco	240	1,566	6.5
Hatteras Village	420	2,355	5.6
Kill Devil Hills	1980	9,632	4.9
Kitty Hawk	1,108	5,410	4.9
Manteo	360	2,021	5.6
Nags Head	2,553	14,666	5.7
Rodanthe	463	3,010	6.5
Salvo	257	1,756	6.8
Southern Shores	464	3,084	6.6
Wanchese	29	134	4.6
Waves	231	1,527	6.6

*Overall Average Number of Nights Stays is 5.8

As shown, the longest average lengths of stay were encountered at Avon and Salvo, with an average visit of 6.8 nights. However, this was very closely followed by five other locations with average stays of 6.4 to 6.6 nights. The shortest average stays were reported in Buxton and Wanchese, at 4.4 and 4.6 nights, respectively.

Overall, for all locations, the average length of stay was 5.8 nights. The 2006 survey found an average length of stay of 5.7 nights, so on an annual basis, this factor appears stable. However, a comparison of the two surveys by season shows some different trends. The average length of stay for the summer season is essentially unchanged. However, the average length of stay has increased in the spring and fall seasons, but fallen in the winter months.

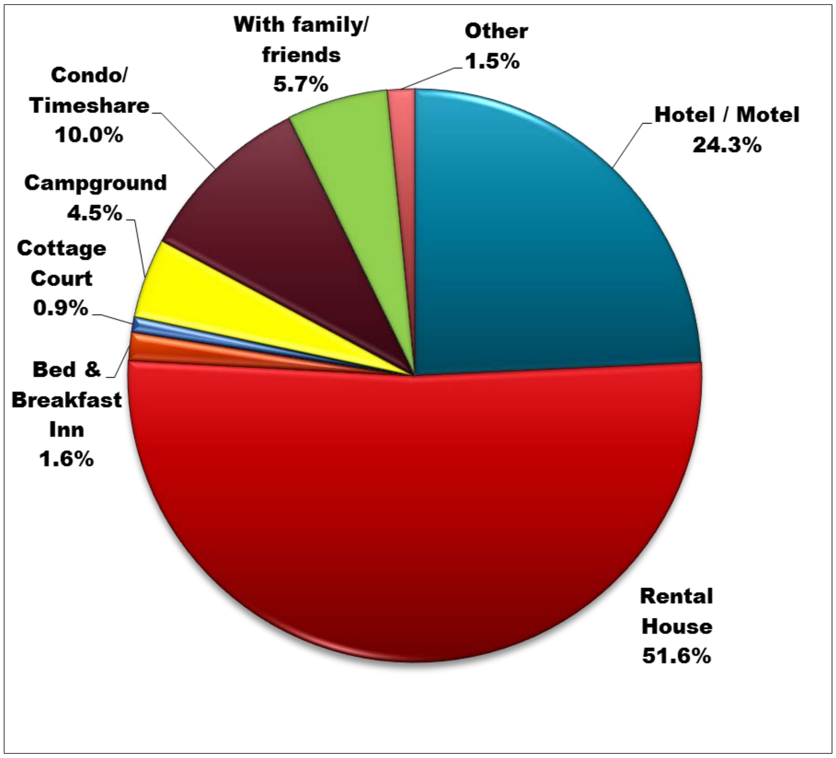
Exhibit 21–Overnight Stays 2006 versus 2015

Length of Stay (nights): 2006 versus 2015		
Season	2006 Survey	2015 Survey
Spring	4.3	5.1
Summer	6.2	6.1
Fall	5.4	6.0
Winter	5.2	3.8
Annual	5.7	5.8

4.6 Accommodation Type

Visitors were asked to identify the type of accommodation they used in The Outer Banks. The annualized results are shown in the chart below.

Exhibit 22–Accommodations



Rental houses accounted for just over half (51.6 percent) of visitor accommodations, followed by hotel/motel at 24.3 percent, and condo/timeshare at 10.0 percent. It is worth noting that of the 1.5 percent who reported "other" accommodations, more than three-quarters stayed in a home which they own, but do not reside in.

The accommodation usage, however, was subject to significant variation across seasons. Seasonal breakouts are presented for all four seasons, beginning with spring.

Exhibit 23–Accommodations–Spring

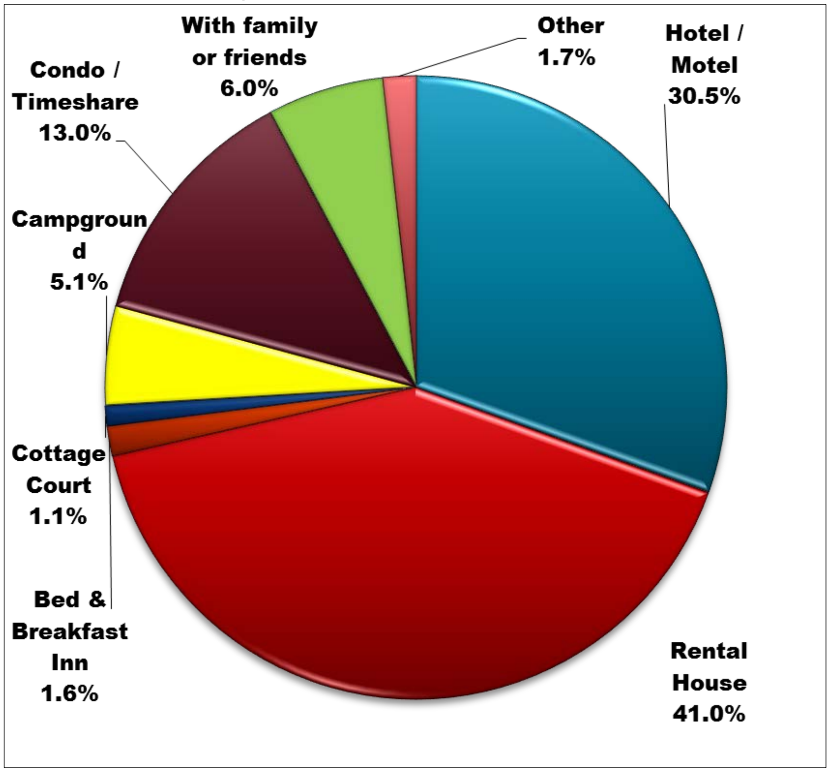


Exhibit 24–Accommodations–Summer

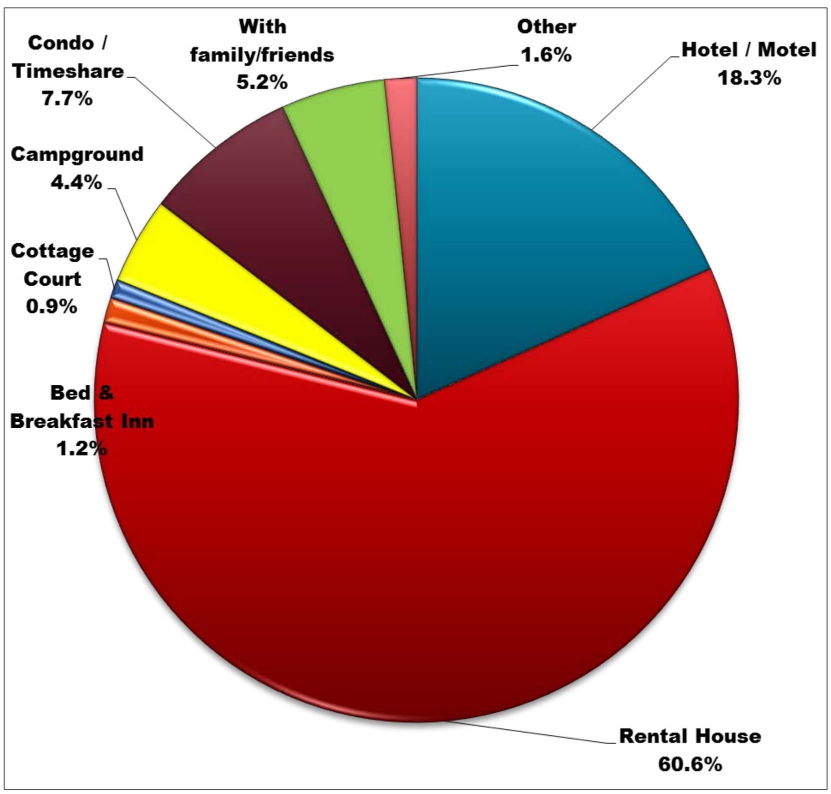


Exhibit 25–Accommodations–Fall

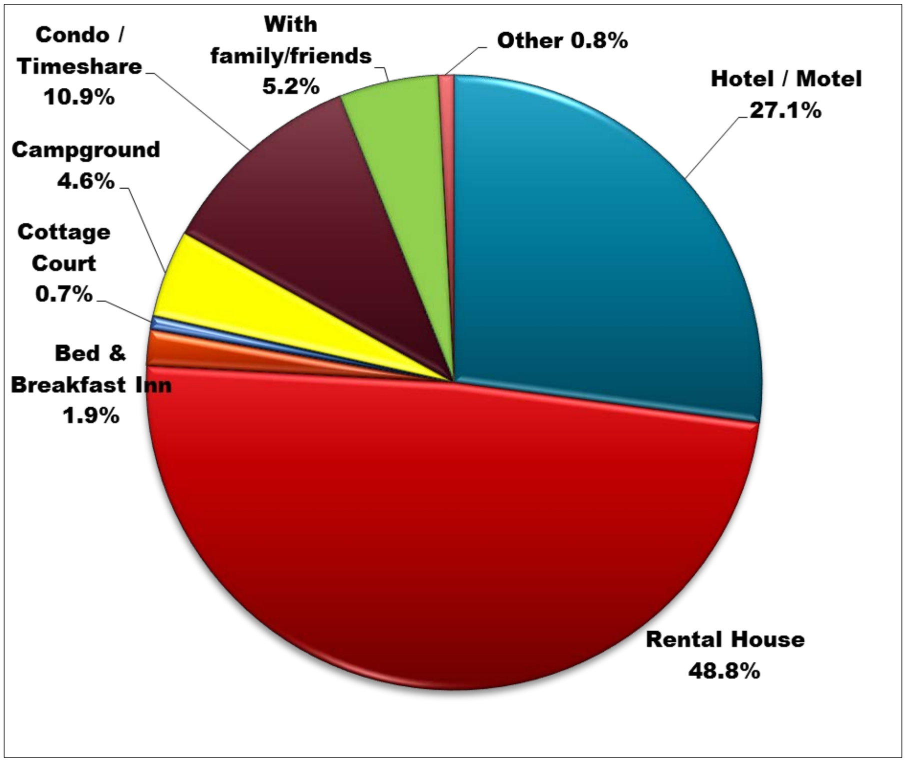
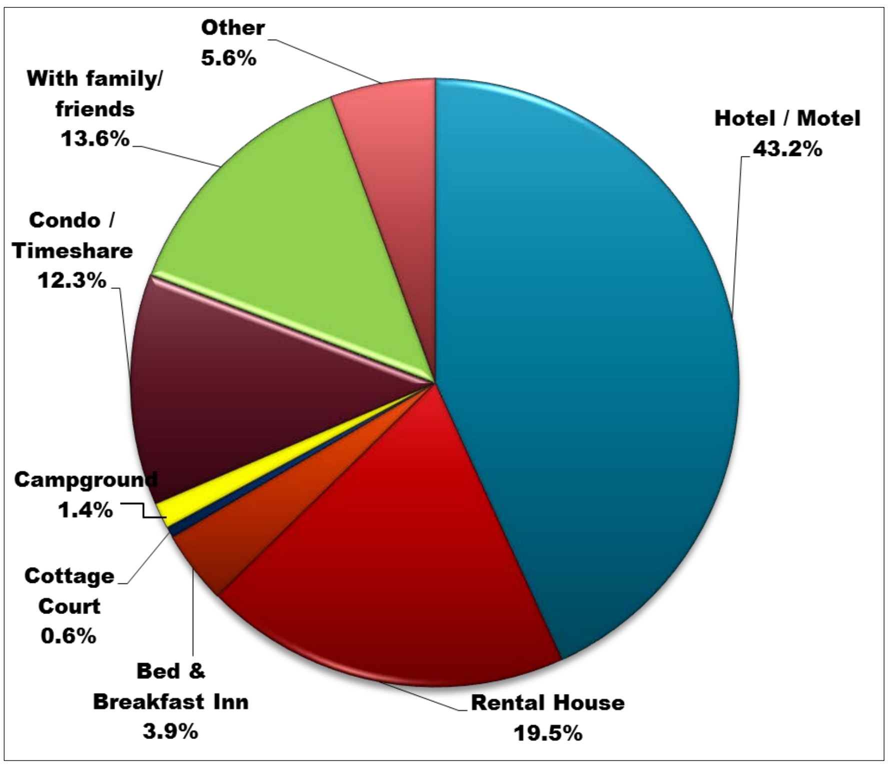


Exhibit 26–Accommodations–Winter



As shown, rental houses are the primary type of visitor accommodation in the spring, summer, and fall, peaking at just over 60 percent of the accommodation market in the summer months. In winter, however, use of rental homes falls to under 20 percent, and a plurality of visitor (43.2 percent) stay in hotels or motels. In addition, the percentage of visitors staying with friends or relatives increases in the winter months, supplanting condos/timeshares as the third highest accommodation category.

The 2006 survey found that visitors who stayed in hotels were significantly less satisfied with their accommodations than visitors who stayed in rental properties, and recommended that The Outer Banks develop a program which would encourage hotel properties to provide an enhanced visitor experience. Given this conclusion, the MAI team looked at the current levels of satisfaction for hotels and rental property guests.

Respondents to the 2015 survey rated their rental property satisfaction as 2.6 on a scale of -3 to 3. Visitors who stayed at hotels rated their satisfaction as 2.4. Both are very positive evaluations, with the difference between the two ratings equating to 3.3 percentage points over the total rating scale. Thus, while there is opportunity for improvement, the survey team did not conclude that this was a current problem area.

4.7 Activities While Visiting

Visitors were asked to identify what activities they actually did during their stay in The Outer Banks, and were given a list of more than 30 applicable activities from which to choose. Visitors were, of course, allowed to select multiple activities, and the typical respondent checked approximately six choices from the list. The annual figures are provided below.

Exhibit 27–Activities That You Did During Your Stay

Activity/ Attraction	# of Respondents	% of Total Respondents
Beach	9,682	87.7%
Scenic drives	7,621	69.1%
Lighthouses	7,311	66.3%
Dining at restaurants unique to the area	5,773	52.3%
National parks	5,436	49.3%
Museums / historic sites	5,278	47.8%
Shopping	5,106	46.3%
Ferry	2,748	24.9%
Fishing from beach or pier	2,378	21.6%
Wildlife preserve/ bird watching	2,361	21.4%
Hiking	2,234	20.2%
Beach/off-road driving	1,772	16.1%
Kite flying	1,544	14.0%
Biking	1,330	12.1%
Kayaking/canoeing	1,007	9.1%
Art gallery	789	7.2%

Activity/ Attraction	# of Respondents	% of Total Respondents
Water sports	776	7.0%
Charter/boat fishing	671	6.1%
Golf	656	5.9%
Surfing	542	4.9%
Camping	523	4.7%
Festival or other special event	515	4.7%
Study /educational tour	442	4.0%
Theater performance	427	3.9%
Concert or musical performance	257	2.3%
Parasailing	246	2.2%
Wedding	238	2.2%
Tennis	185	1.7%
Hang gliding	146	1.3%
Competitive sports event	126	1.1%
Kite boarding	88	0.8%
Scuba diving	61	0.1%

The top three activities on an annualized basis were: beach, scenic drive, and lighthouses, and indeed, these same three activities, in the same order, top the list in every season of the year. Below the top three, however, there is more volatility from season to season. The four seasonal displays of activities performed are as follows:

Exhibit 28–Activities That You Did During Your Stay–Spring

Activity/ Attraction	# of Respondents	% of Total Respondents
Beach	2,176	84.8%
Scenic drives	1,848	72.0%
Lighthouses	1,825	71.1%
National parks	1,397	54.4%
Museums / historic sites	1,374	53.5%
Dining at restaurants unique to the area	1,306	50.9%
Shopping	1,092	42.6%
Wildlife preserve/ bird watching	659	25.7%
Hiking	647	25.2%
Ferry	536	20.9%
Fishing from beach or pier	449	17.5%
Beach/Off-road driving	381	14.8%
Kite flying	309	12.0%
Biking	253	9.9%
Shipwrecks	212	8.3%
Kayaking / canoeing	181	7.1%
Art gallery	171	6.7%

Activity/ Attraction	# of Respondents	% of Total Respondents
Camping	143	5.6%
Golf	131	5.1%
Charter/boat fishing	125	4.9%
Study/educational tour	121	4.7%
Boating	119	4.6%
Water sports	92	3.6%
Surfing	82	3.2%
Festival or other special event	79	3.1%
Wedding	60	2.3%
Theater performance	55	2.1%
Tennis	45	1.8%
Concert or musical performance	38	1.5%
Hang gliding	36	1.4%
Parasailing	28	1.1%
Kite boarding	26	1.0%
Competitive sports event	20	0.8%
Business meeting/ conference	19	0.7%
Scuba diving	13	0.5%

Exhibit 29–Activities That You Did During Your Stay–Summer

Activity/ Attraction	# of Respondents	% of Total Respondents
Beach	4,751	92.5%
Scenic drives	3,394	66.1%
Lighthouses	3,236	63.0%
Dining at restaurants unique to the area	2,736	53.3%
Shopping	2,535	49.4%
National parks	2,307	44.9%
Museums / historic sites	2,247	43.8%
Ferry	1,336	26.0%
Fishing from beach or pier	1,324	25.8%
Wildlife preserve / bird watching	946	18.4%
Hiking	941	18.3%
Kite flying	933	18.2%
Beach / off-road driving	882	17.2%
Biking	805	15.7%
Kayaking / canoeing	631	12.3%
Water sports	565	11.0%
Boating	426	8.3%

Activity/ Attraction	# of Respondents	% of Total Respondents
Charter / boat fishing	390	7.6%
Surfing	375	7.3%
Art gallery	361	7.0%
Golf	360	7.0%
Theater performance	312	6.1%
Shipwrecks	300	5.8%
Festival or other special event	272	5.3%
Camping	238	4.6%
Study/Educational tour	193	3.8%
Parasailing	184	3.6%
Concert or musical performance	160	3.1%
Tennis	112	2.2%
Hang gliding	77	1.5%
Wedding	69	1.3%
Competitive sports event	49	1.0%
Kite boarding	42	0.8%
Scuba diving	33	0.6%
Business meeting/ conference	19	0.4%

Exhibit 30–Activities That You Did During Your Stay–Fall

Activity/ Attraction	# of Respondents	% of Total Respondents
Beach	2,500	84.5%
Scenic drives	2,145	72.5%
Lighthouses	2,064	69.8%
Dining at restaurants unique to the area	1,575	53.2%
National parks	1,555	52.6%
Museums/historic sites	1,490	50.4%
Shopping	1,354	45.8%
Ferry	840	28.4%
Wildlife preserve/bird watching	677	22.9%
Hiking	574	19.4%
Fishing from beach or pier	564	19.1%
Beach/off-road driving	462	15.6%
Kite flying	280	9.5%
Biking	252	8.5%
Art gallery	246	8.3%
Shipwrecks	194	6.6%
Kayaking / canoeing	177	6.0%

Activity/ Attraction	# of Respondents	% of Total Respondents
Golf	149	5.0%
Charter/boat fishing	146	4.9%
Festival or other special event	138	4.7%
Camping	128	4.3%
Boating	118	4.0%
Study/educational tour	113	3.8%
Water sports	108	3.7%
Wedding	79	2.7%
Surfing	74	2.5%
Concert or musical performance	54	1.8%
Competitive sports event	50	1.7%
Theater performance	49	1.7%
Parasailing	32	1.1%
Hang gliding	31	1.0%
Tennis	25	0.8%
Business meeting/conference	21	0.7%
Kite boarding	19	0.6%
Scuba diving	11	0.4%

Exhibit 31–Activities That you Did During Your Stay–Winter

Activity/ Attraction	# of Respondents	% of Total Respondents
Beach	255	67.8%
Scenic drives	234	62.2%
Lighthouses	186	49.5%
National parks	177	47.1%
Museums/historic sites	167	44.4%
Dining at restaurants unique to the area	156	41.5%
Shopping	125	33.2%
Wildlife preserve/bird watching	79	21.0%
Hiking	72	19.1%
Beach /off-road driving	47	12.5%
Fishing from beach or pier	41	10.9%
Ferry	36	9.6%
Wedding	30	8.0%
Festival or other special event	26	6.9%
Kite flying	22	5.9%
Biking	20	5.3%
Kayaking / canoeing	18	4.8%
Golf	16	4.3%

Activity/ Attraction	# of Respondents	% of Total Respondents
Study /educational tour	15	4.0%
Shipwrecks	15	4.0%
Boating	14	3.7%
Camping	14	3.7%
Business meeting/conference	14	3.7%
Surfing	11	2.9%
Water sports	11	2.9%
Art gallery	11	2.9%
Theater performance	11	2.9%
Charter/boat fishing	10	2.7%
Competitive sports event	7	1.9%
Concert or musical performance	5	1.3%
Scuba diving	4	1.1%
Tennis	3	0.8%
Parasailing	2	0.5%
Hang gliding	2	0.5%
Kite boarding	1	0.3%

In spring and winter, National Parks are the fourth most popular activity, while in summer and fall dining at restaurants unique to the area is fourth. Interest in shopping peaks in summer, when it is the fifth most popular activity. Many of the outdoor activities are naturally less prevalent in the winter months.

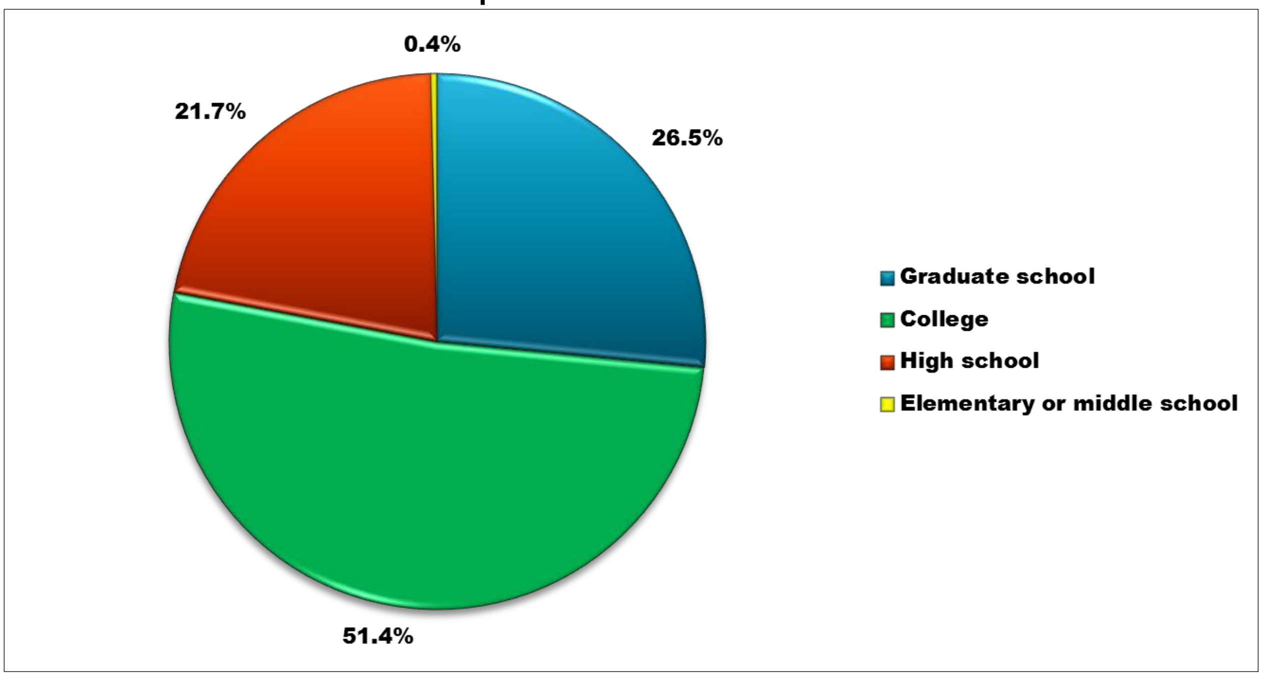
4.8 Travel Party Characteristics

Visitors to The Outer Banks are, on average, affluent and well-educated. More than 30 percent of respondents have household incomes of over $100,000 per annum, and the average annual income is approximately $90,000. The vast majority of respondents (78 percent) were college graduates, and over a quarter (26.5 percent) had completed graduate degrees.

Exhibit 32–Income Range of Respondents

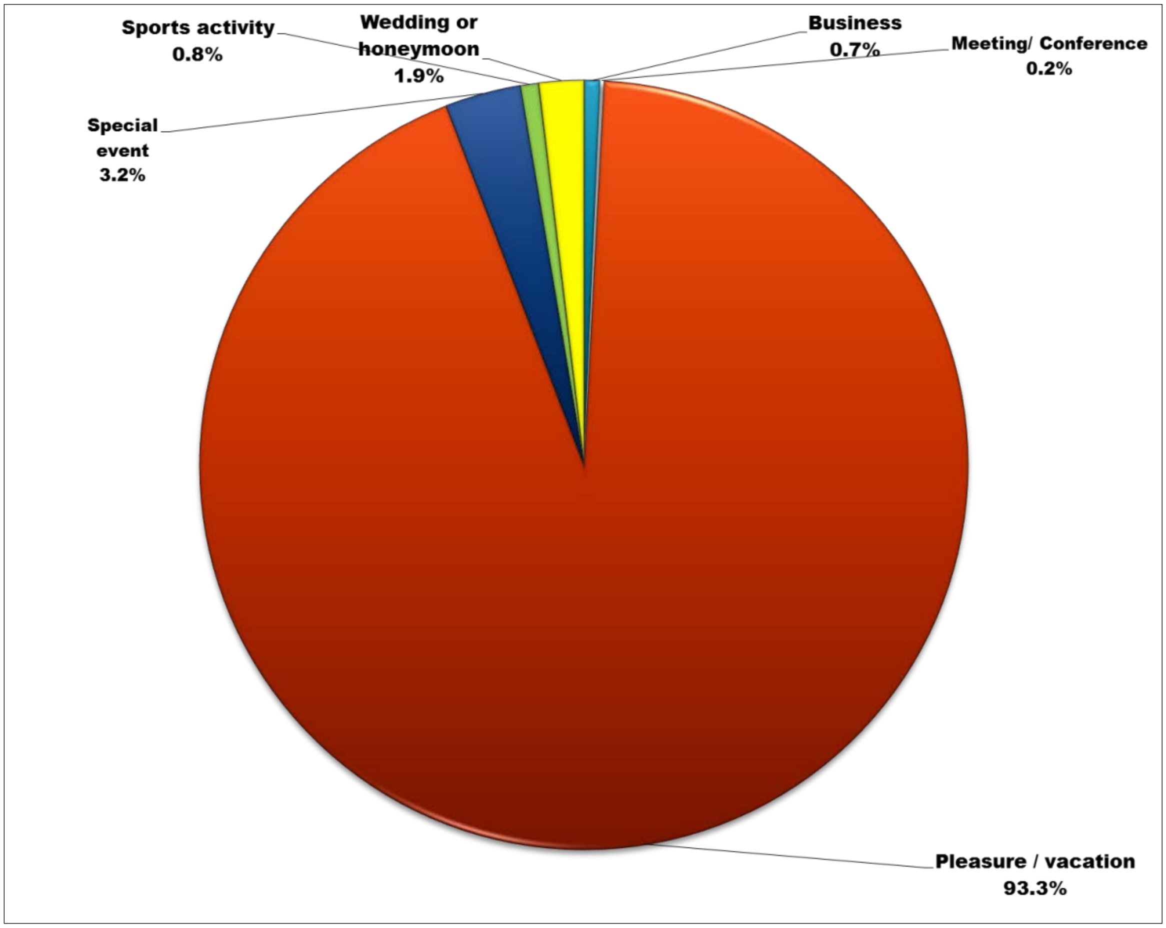
Income Level	Number of Respondents	% of Respondents
$150,000+	1,215	14.9%
$110,000 – 149,999	1,342	16.5%
$70,000 – 109,999	2,514	30.9%
$30,000 – 69,999	2,209	27.2%
Less than $30,000 annually	468	5.8%
Retired	381	4.7%

Exhibit 33–Education Level of Respondents



The survey also asked visitors to identify the primary purpose of their trip (only one choice possible). The responses are summarized in this pie chart:

Exhibit 34–Main Purpose of Visit

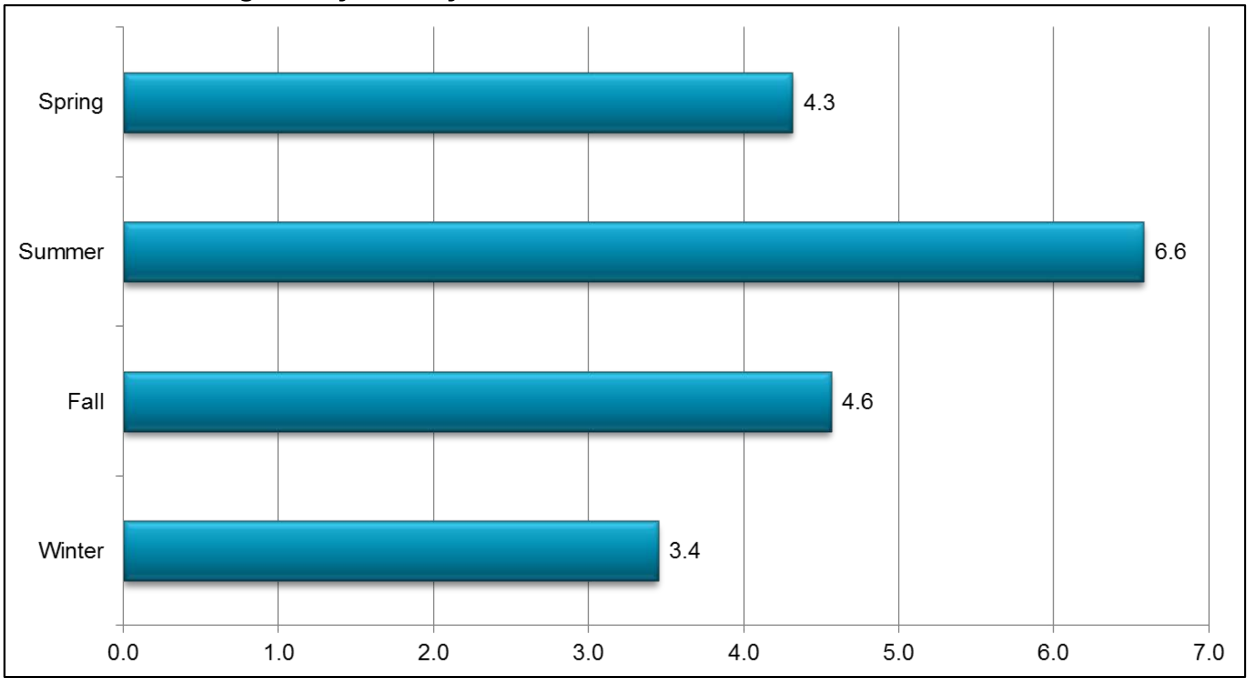


Not surprisingly, the vast majority of visitors to The Outer Banks report that their primary purpose in coming was pleasure/vacation, 93.3 percent. In distant second place were special events, with 3.2 percent: respondents cited the Wedding Expo, family reunions, anniversaries, and the OBX Marathon as being among the special events which drew them to The Outer Banks. Business and meetings/conferences combined account for only 0.9 percent of annual visitation.

A detailed season-by-season depiction of Main Purpose of Visit is provided in Volume 2. However, the spring, summer, and fall distributions of purpose are all very similar to the annual figures. Only during the winter, when pleasure/vacation visitation drops off dramatically, does the picture change significantly. During the winter, special events, business trips, and conferences combine for roughly a quarter of the visitors, and the pleasure/vacation component falls to 71.25 percent.

The average annual size of party was 5.4 persons. Average party size by season is highly variable, with the smallest party size occurring in summer, and the smallest size in winter:

Exhibit 35–Average Party Size by Season



*Overall Average Party Size, 5.4

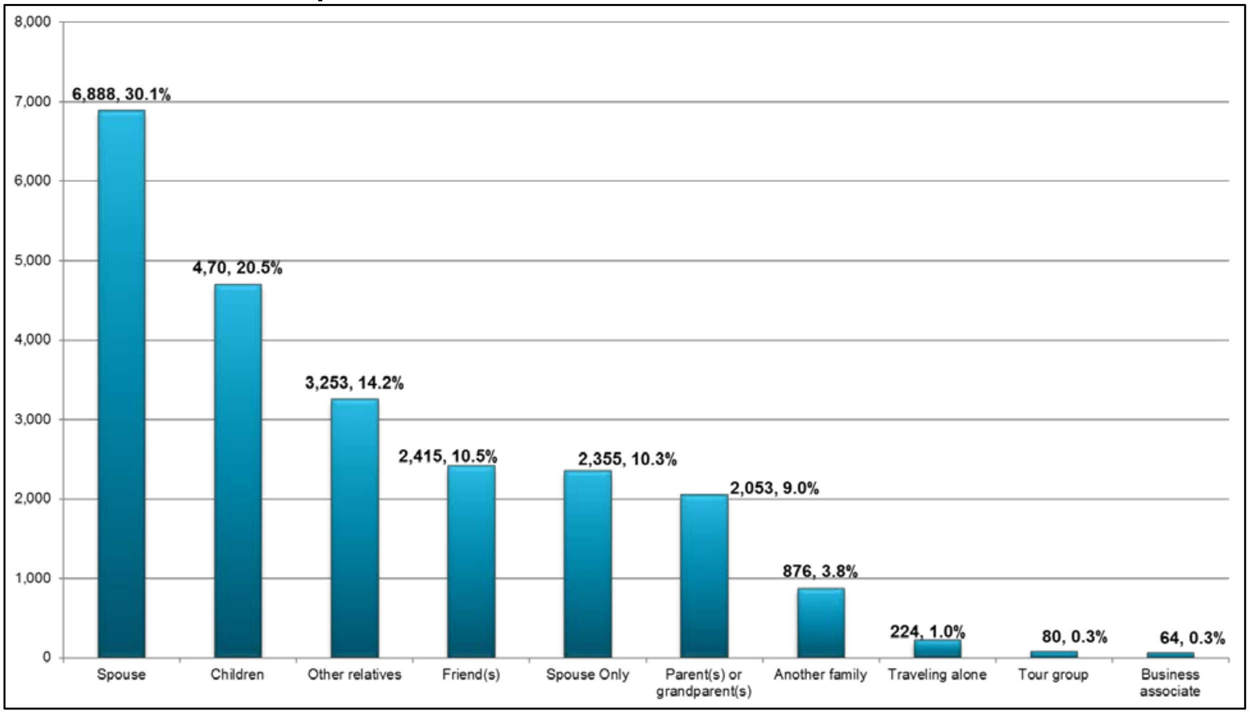
Comparing these numbers with the 2006 survey, we see that there has been a slight decrease in the average party size, a phenomenon common to many U.S. destinations today due to changing demographics (smaller family size, more single parents). The biggest decrease is in the summer months, while there was a modest increase in the size of spring season parties.

Exhibit 36–Comparison of Party Size, 2006-2015

Comparison of Party Size 2006-2015		
Season	**2006 Survey**	**2015 Survey**
Spring	4.0	4.3
Summer	7.6	6.6
Fall	5.4	4.6
Winter	3.8	3.4
Annual	6.3	5.4

The next graph provides insight into party composition by depicting reported travel companions. In reviewing this chart, please note that the first column is spouse. As shown, 30.1 percent of visitors reported traveling with their spouse. A later column, "Spouse only", shows that 10.3 of visitors reported that they were traveling with their spouse only. The difference between these two figures, 19.8 percent, represents the percentage of travel parties which included spouse and others (e.g., spouse and children, spouse and friends, spouse and parents, etc.).

Exhibit 37–Travel Companions



As one might anticipate, given the significant changes in party size by season, party composition also varies by season. The following four graphs display travel companions by season, as reported by the survey respondents.

Exhibit 38–Travel Companions–Spring

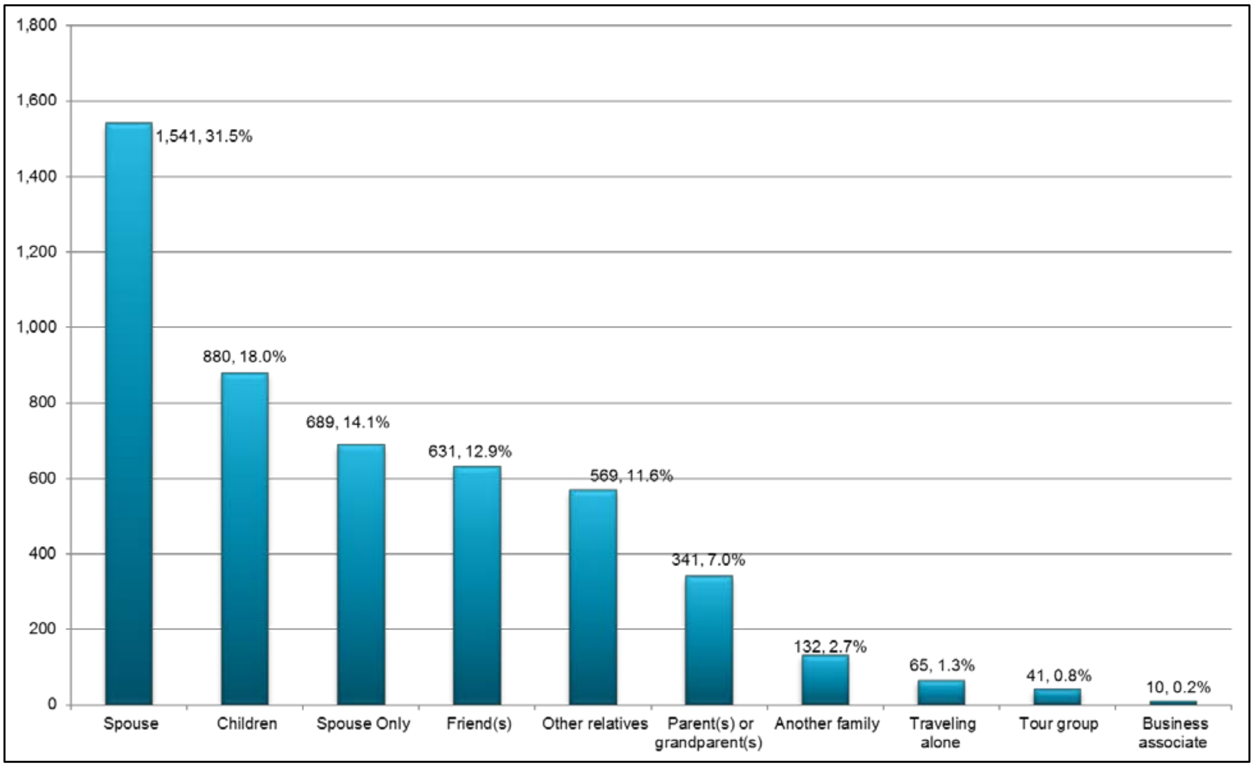


Exhibit 39–Travel Companions–Summer

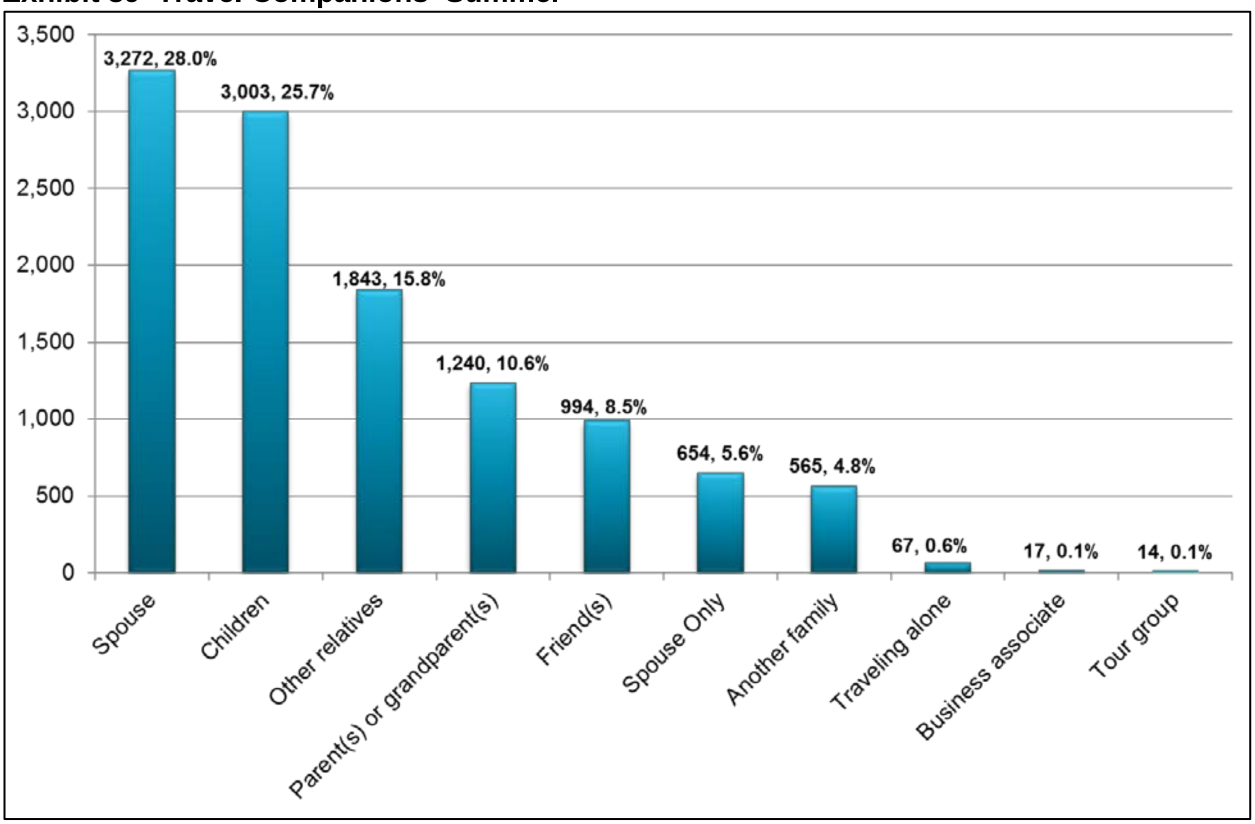


Exhibit 40–Travel Companions–Fall

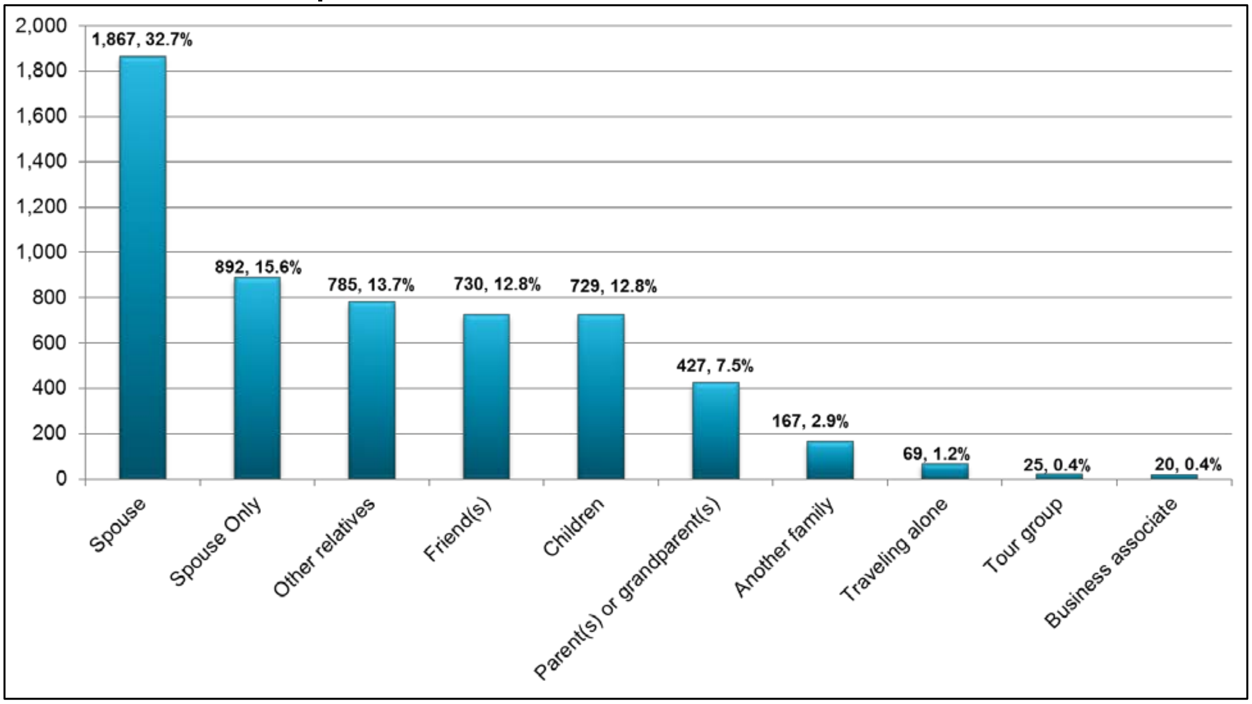
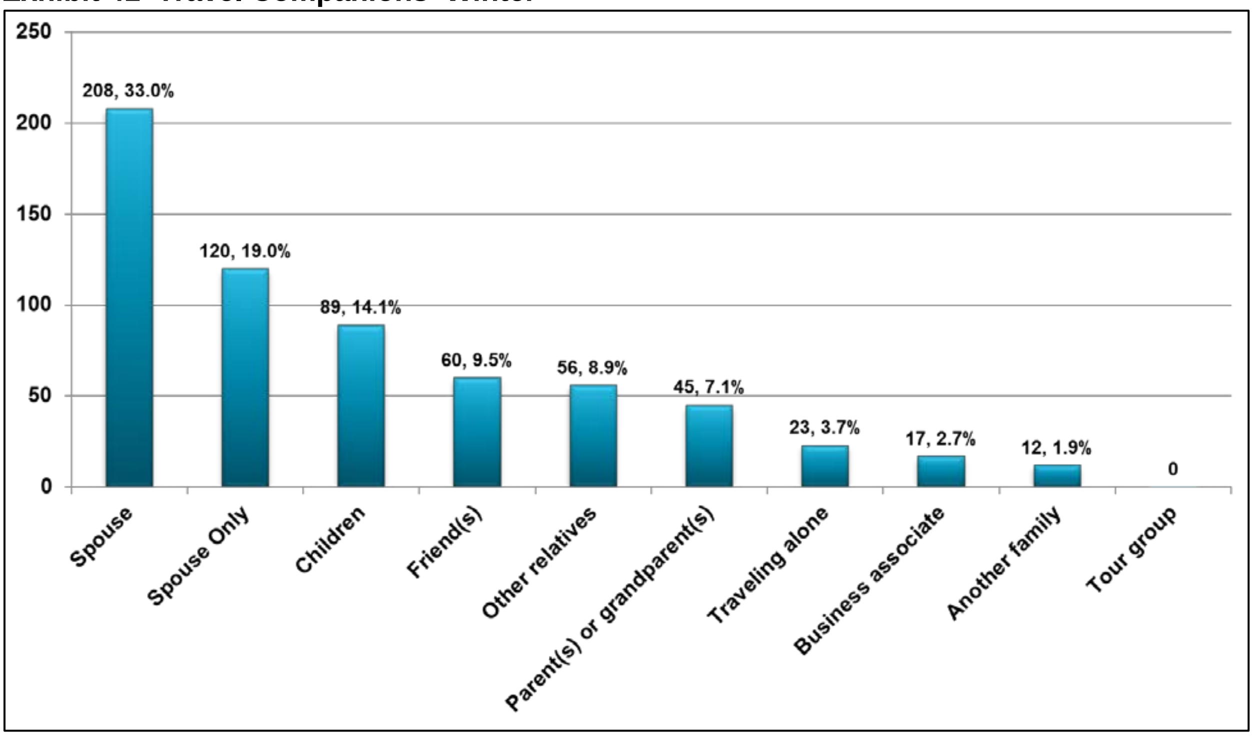


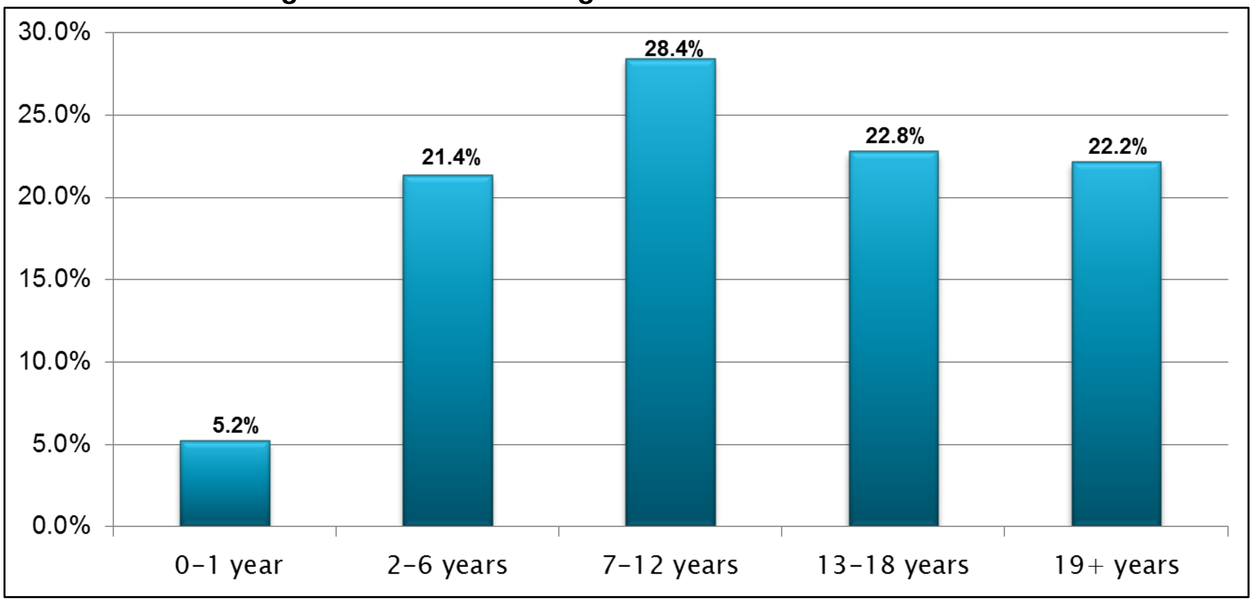
Exhibit 41–Travel Companions–Winter



A clear pattern is discernable, with the greatest presence of parties with children in the summer, and more couple-only travel in the fall and winter.

The percentage of parties traveling with children is shown below. The average party travelling with children had 1.98 children, and the average age of children in the travel parties (overall) is 11.6 years. Additional information on children in travel parties by season is presented in Volume 2.

Exhibit 42–Percentage of Parties Traveling with Children

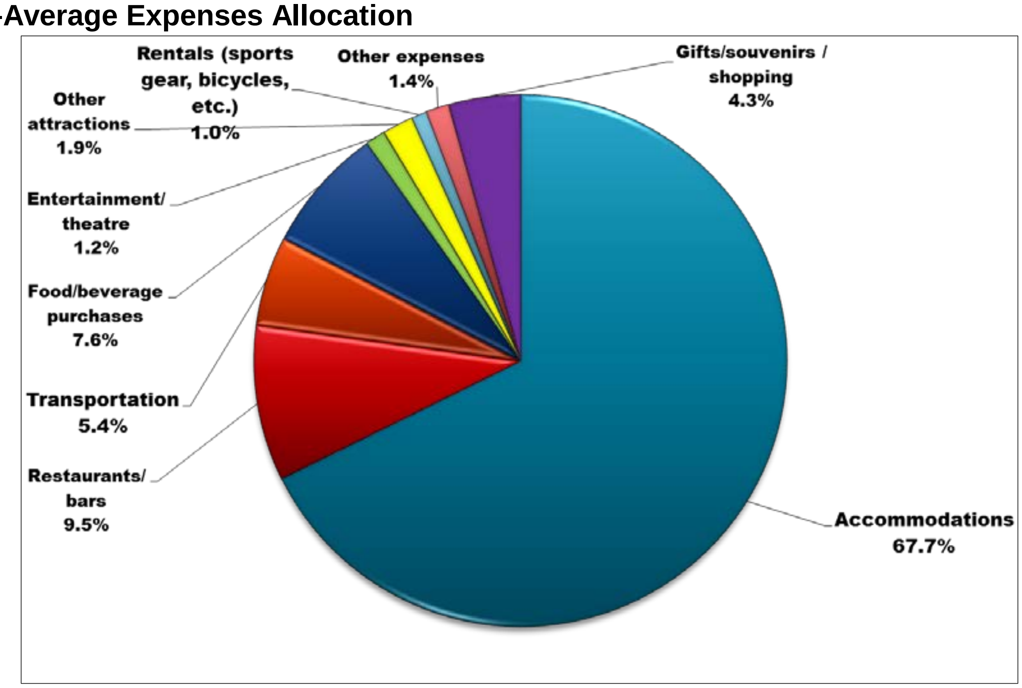


Average Total Number of Children: 1.98

4.9 Visitor Spending

The survey asked visitors to report their trip expenses, allocated among nine categories of expense. This pie chart displays the annual distribution of expenses by category.

Exhibit 43–Average Expenses Allocation



The greatest share of expenses (67.7 percent) is devoted to accommodations, followed by restaurants/bars (9.5 percent), Food/beverage purchases in stores (7.6 percent), transportation (mostly to and from The Outer Banks) (5.4 percent), and gifts/souvenirs/shopping (4.3 percent). This is a fairly typical distribution of expenses for a primarily drive-to destination, except that the percentage spent in restaurants/bars would normally be higher (e.g., 15% or more). The MAI team initially hypothesized that this was due to the high percentage of visitors staying in rentals, who would purchase food and drink to prepare and consume at their rental properties.

The next four graphs display the expense distribution by season.

Exhibit 44–Average Expenses Allocation-Spring

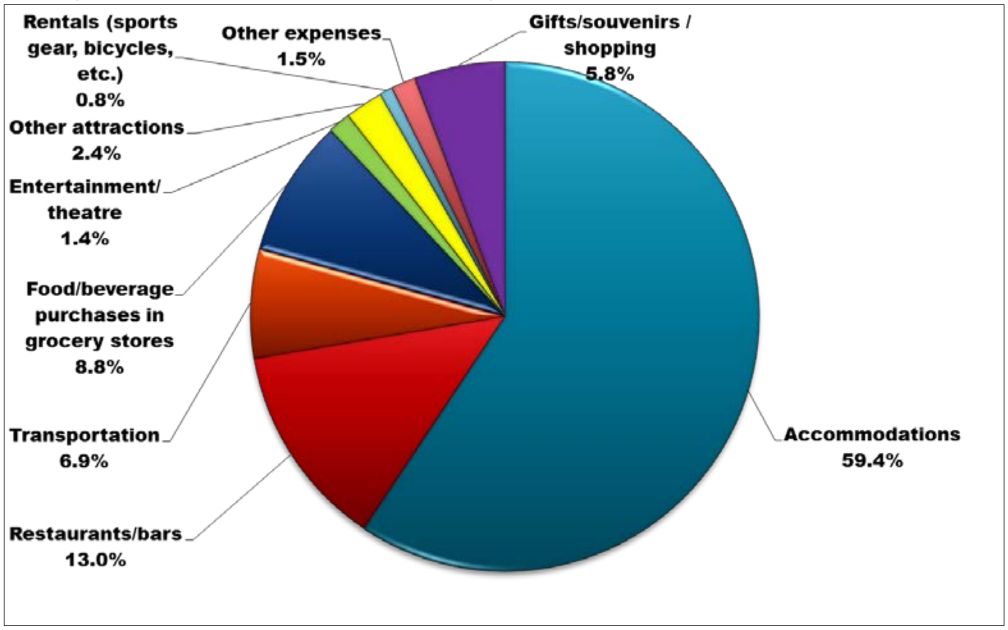


Exhibit 45–Average Expenses Allocation-Summer

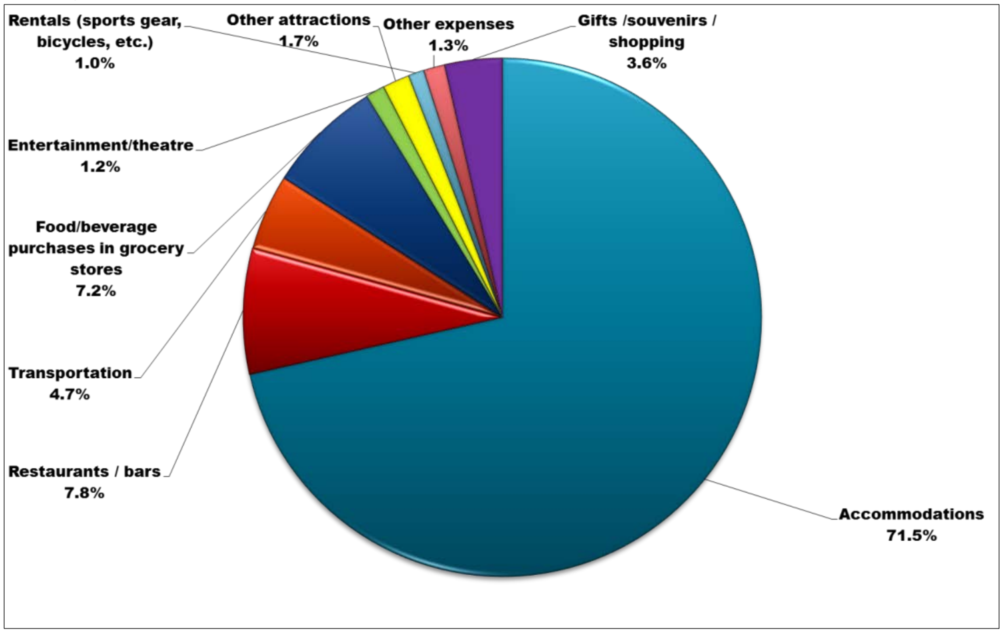


Exhibit 46–Average Expenses Allocation-Fall

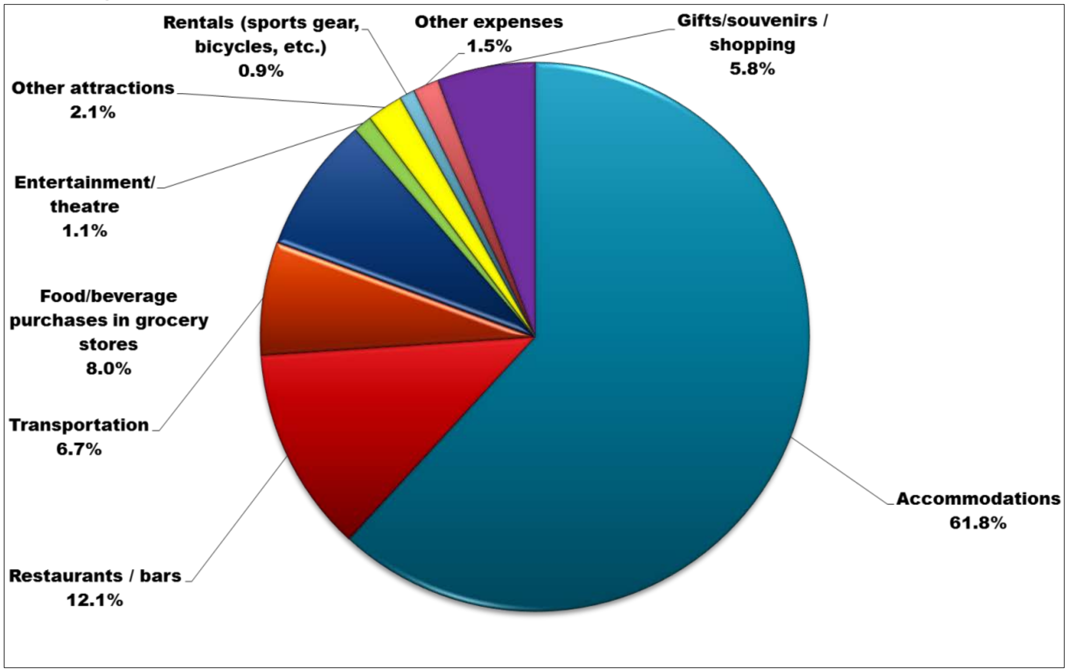
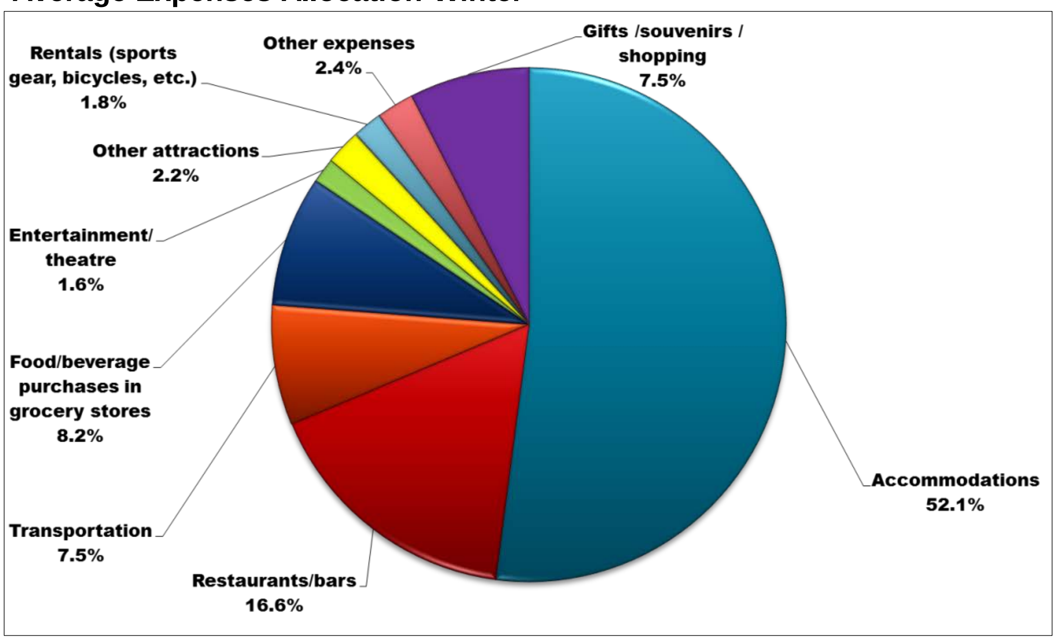


Exhibit 47–Average Expenses Allocation-Winter



As can be seen, accommodation expense, as a share of total expenses, peaks in the summer months, when restaurant/bar spending is at its nadir as a percent of total expenses. In the fall, the portion of spending on accommodation decreases and restaurant/bar spending increases. In the winter, accommodation spending falls further, to 52.1 percent, and restaurant/bar spending increases to 16.6 percent, its highest point in the year. Interestingly, though, food and beverage purchases in stores as a share of total expense does not decline over this period: it is 7.2 percent in summer, 8.0 in the fall, and 8.2 percent in winter. The MAI team concluded that two factors were in play. First, higher percentages of visitors staying in hotels mean an increased percentage of visitors will dine in restaurants. Secondly, the increasing percentage of couples traveling without children in the fall and winter will lead to higher per-meal spending regardless of whether the couples rent a property or dine in restaurants ("steaks versus burgers").

Another interesting trend was that while a higher percentage of visitors reported shopping in the summer months than in other seasons, the amount spent on shopping per visitor as a share of their total expenses was lowest during this season.

Average trip expenses in dollars, per visitor, are shown by expense category below.

Exhibit 48–Average Trip Expenses in Dollars

Category	Total Expenses Reported	Total # of Respondents	Avg Expense/ Visiting Party*	Total Visitors Included in Expenses Reported**	Avg Expense/ Visitor	Total Number of Visitors***	Overall Avg Expense/ Visitor
Accommodations	$13,060,741	7,360	$1,775	36,705	$355.83	37,694	$346.49
Restaurants/bars	$1,827,188	6,041	$302	25,918	$70.50	26,974	$67.74
Food/beverage purchases in grocery stores	$1,467,305	5,893	$249	28,103	$52.21	28,609	$51.29
Transportation	$1,049,726	4,710	$223	19,428	$54.03	21,870	$48.00
Gifts /souvenirs / shopping	$838,349	5,370	$156	23,905	$35.07	25,006	$33.53
Other attractions	$362,132	3,805	$95	13,845	$26.16	17,788	$20.36
Other expenses	$269,118	2,273	$118	5,545	$48.53	10,607	$25.37
Entertainment/ theatre	$234,593	3,372	$70	8,657	$27.10	16,001	$14.66
Rentals (sports gear, bicycles, etc.)	$184,075	2,850	$65	5,919	$31.10	14,439	$12.75

***Average party size is 4.2 and the average length of stay is 5.8 days.**

****Number of visitors included in the reported expenses in the category (i.e., excludes $0 responses).**

*****The total number of visitors is the sum of visitors that were included in expenditures reported (i.e., includes $0 responses).**

Expenditures in dollars, by season, are presented on the following pages.

Exhibit 49–Average Trip Expenses in Dollars–Spring

Category	Total Expenses Reported	Total # of Respondents	Avg Expense/ Visiting Party*	Total Visitors Included in Expenses Reported**	Avg Expense/ Visitor	Total Number of Visitors***	Overall Avg Expense/ Visitor
Accommodations	$1,724,419	1,683	$1,025	6,623	$260	6,900	$250
Restaurants/bars	$377,175	1,418	$266	4,887	$77	5,046	$75
Food/beverage purchases in grocery stores	$254,432	1,364	$187	4,939	$52	5,092	$50
Transportation	$200,837	1,130	$178	3,751	$54	4,252	$47
Gifts/souvenirs/ shopping	$167,310	1,260	$133	4,257	$39	4,549	$37
Other attractions	$70,191	939	$75	2,605	$27	3,429	$20
Other expenses	$44,550	567	$79	908	$49	2,048	$22
Entertainment/ theatre	$41,854	825	$51	1,348	$31	3,059	$14
Rentals (sports gear, bicycles, etc.)	$24,311	681	$36	772	$31	2,627	$9

***Average party size is 4.2 and the average length of stay is 5.8 days.**

****Number of visitors included in the reported expenses in the category (i.e., excludes $0 responses).**

*****The total number of visitors is the sum of visitors that were included in expenditures reported (i.e., includes $0 responses).**

Exhibit 50–Average Trip Expenses in Dollars–Summer

Category	Total Expenses Reported	Total # of Respondents	Avg Expense/ Visiting Party*	Total Visitors Included in Expenses Reported**	Avg Expense/ Visitor	Total Number of Visitors***	Overall Avg Expense/ Visitor
Accommodations	$9,076,082	3,550	$2,557	21,673	$419	22,098	$411
Restaurants/ bars	$994,344	2,820	$353	14,898	$67	15,578	$64
Food/beverage purchases in grocery stores	$916,503	2,854	$321	16,724	$55	16,903	$54
Transportation	$600,993	2,195	$274	11,030	$54	12,469	$48
Gifts/souvenirs / shopping	$454,731	2,552	$178	14,122	$32	14,655	$31
Other attractions	$213,995	1,779	$120	7,896	$27	10,118	$21
Other expenses	$166,937	1,076	$155	3,530	$47	6,222	$27
Entertainment/ theatre	$151,617	1,689	$90	5,712	$27	9,696	$16
Rentals (sports gear, bicycles, etc.)	$124,289	1,462	$85	4,322	$29	9,114	$14

***Average party size is 6.7 and the average length of stay is 6.2 days.**

****Number of visitors included in the reported expenses in the category (i.e., excludes $0 responses).**

*****The total number of visitors is the sum of visitors that were included in expenditures reported (i.e., includes $0 responses).**

Exhibit 51–Average Trip Expenses in Dollars–Fall

Category	Total Expenses Reported	Total # of Respondents	Avg Expense/ Visiting Party*	Total Visitors Included in Expenses Reported**	Avg Expense/ Visitor	Total Number of Visitors***	Overall Avg Expense/ Visitor
Accommodations	$2,147,612	1,921	$1,118	7,889	$272	8,106	$265
Restaurants/ bars	$419,760	1,607	$261	5,589	$75	5,793	$72
Food/beverage purchases in grocery stores	$278,560	1,512	$184	5,973	$47	6,110	$46
Transportation	$231,621	1,245	$186	4,296	$54	4,747	$49
Gifts/souvenirs / shopping	$199,988	1,422	$141	5,137	$39	5,389	$37
Other attractions	$73,128	982	$74	3,113	$23	3,947	$19
Other expenses	$52,517	573	$92	1,047	$50	2,201	$24
Entertainment/ theatre	$37,706	759	$50	1,383	$27	2,925	$13
Rentals (sports gear, bicycles, etc.)	$31,495	633	$50	776	$41	2,507	$13

***Average party size is 4.9 and the average length of stay is 6.0 days.**

****Number of visitors included in the reported expenses in the category (i.e., excludes $0 responses).**

*****The total number of visitors is the sum of visitors that were included in expenditures reported (i.e., includes $0 responses).**

Exhibit 52–Average Trip Expenses in Dollars–Winter

Category	Total Expenses Reported	Total # of Respondents	Avg Expense/ Visiting Party*	Total Visitors Included in Expenses Reported**	Avg Expense/ Visitor	Total Number of Visitors***	Overall Avg Expense/ Visitor
Accommodations	$112,628	206	$547	520	$217	590	$191
Restaurants/ bars	$35,909	196	$183	544	$66	557	$64
Food/beverage purchases in grocery stores	$17,810	163	$109	467	$38	504	$35
Transportation	$16,275	140	$116	351	$46	402	$40
Gifts /souvenirs / shopping	$16,320	136	$120	389	$42	413	$40
Other attractions	$4,818	105	$46	231	$21	294	$16
Other expenses	$5,114	57	$90	60	$85	136	$38
Entertainment/ theatre	$3,416	99	$35	214	$16	321	$11
Rentals (sports gear, bicycles, etc.)	$3,980	74	$54	49	$81	191	$21

***Average party size is 3.5 and the average length of stay is 4.4 days.**

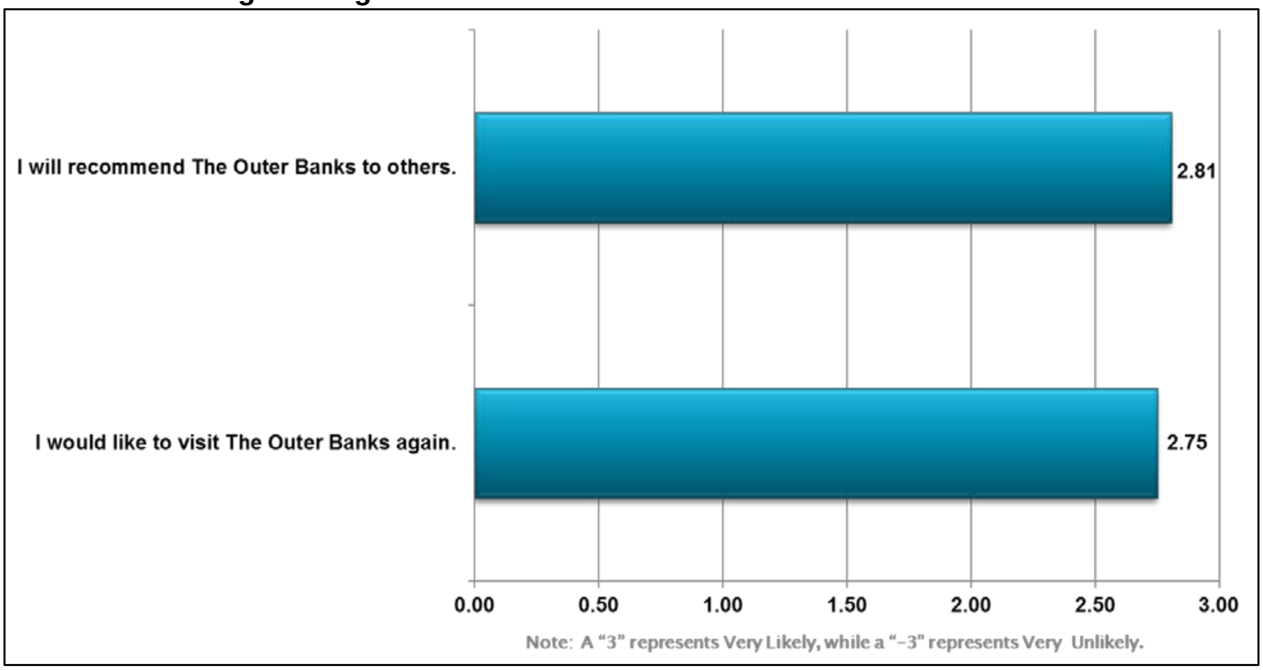
****Number of visitors included in the reported expenses in the category (i.e., excludes $0 responses).**

*****The total number of visitors is the sum of visitors that were included in expenditures reported (i.e., includes $0 responses).**

4.10 Visitor Interest in Returning

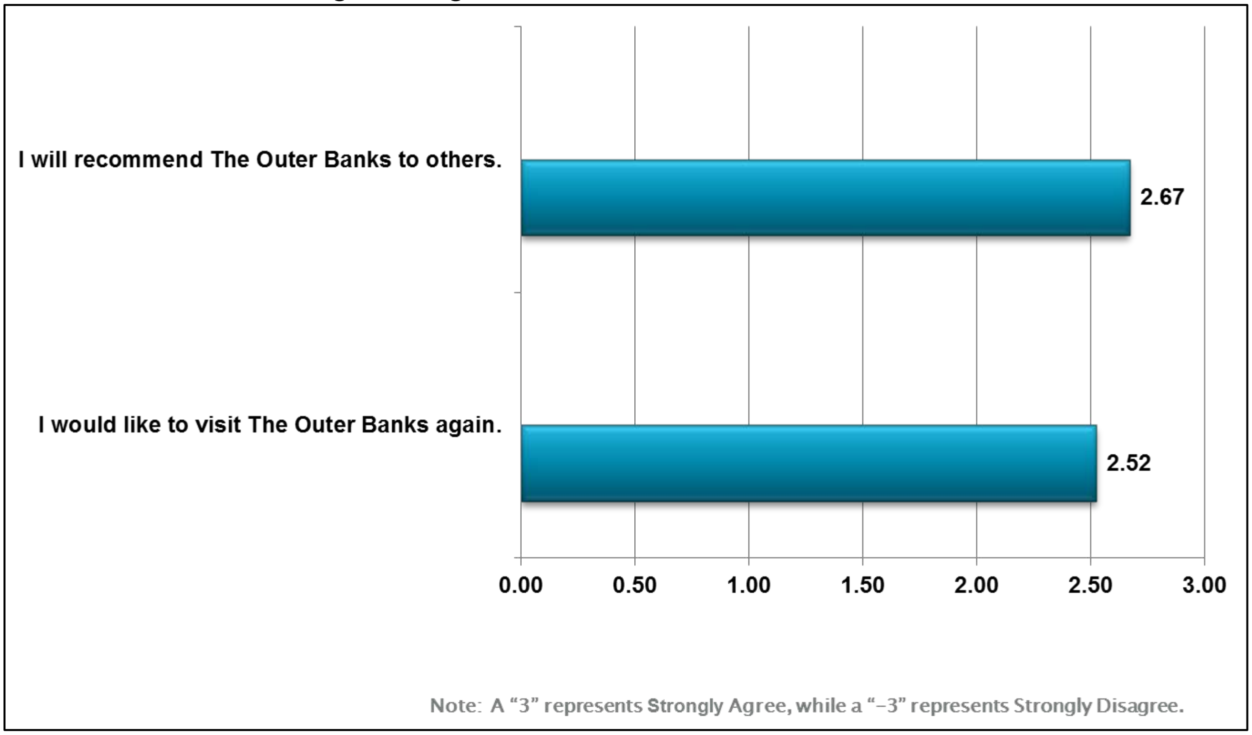
We know from the visitor satisfaction figures presented earlier in this report, that the typical Outer Banks visitor is highly satisfied with their experience. But a satisfied visitor is not necessarily a repeat visitor: how likely are Outer Banks visitors to return and/or recommend The Outer Banks to others? We have a hint as to what the answer to this question will be, from the earlier finding that the average repeat visitor surveyed had made a total of six trips to The Outer Banks. Nonetheless, the survey explicitly asked how strongly visitors would agree or disagree with the following statements: “I will recommend The Outer Banks to others” and “I would like to visit The Outer Banks again”. Visitors were given a scale of -3 (strongly disagree with this statement) to 3 (strongly agree). The results are displayed below; since they were so strongly positive, only the positive side of the rating scale is shown.

Exhibit 53–Average Rating Likelihood Return to Visit and Recommend to Others



The following chart presents the same question, but only as responded to by first-time visitors; repeat visitors are excluded.

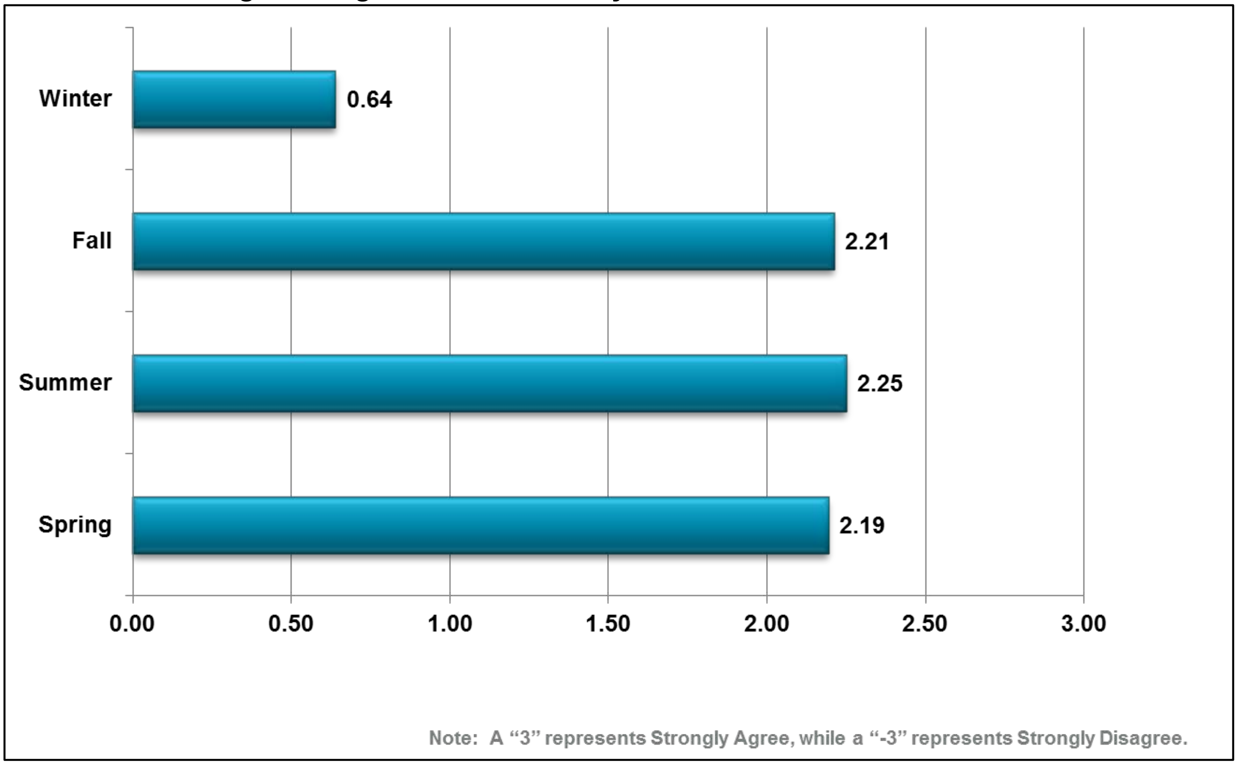
Exhibit 54–
First Time Visitor Average Rating Likelihood Return to Visit and Recommend to Others



As can be seen, first-time visitors were also very positive, but slightly less so than the population as a whole, which includes repeat visitors.

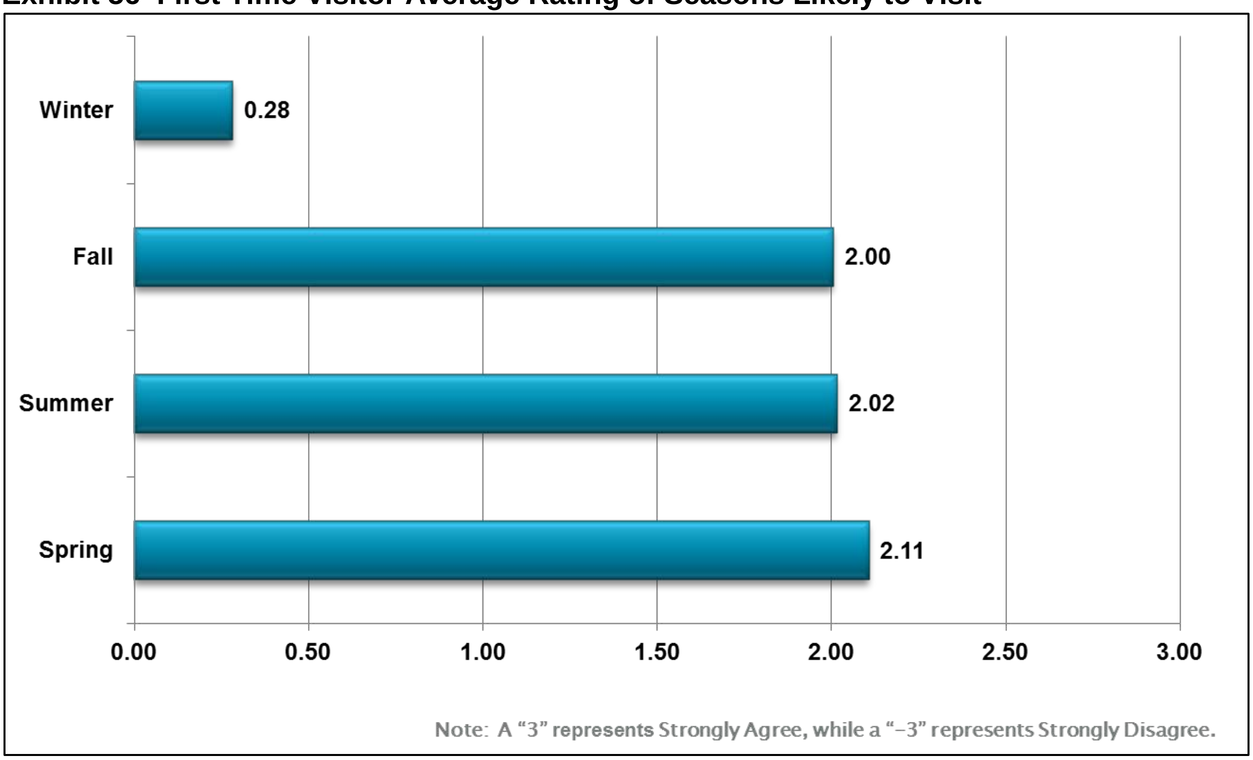
Visitors were also asked during which season or seasons they were likely to return, using the same -3 to 3 scale. The results are provided below, and show a strong propensity to return in spring, summer, or fall, but only a mild desire (0.64) to return in the winter; 0 would indicate a completely neutral view of returning in winter.

Exhibit 55–Average Rating of Seasons Likely to Visit



Sorting this question to include only responses from first-time visitors, we have these results:

Exhibit 56–First Time Visitor Average Rating of Seasons Likely to Visit



Again, the first-time visitors displayed a similar pattern to the overall population, but slightly less positive. Additional information on likelihood to visit by season is presented in Volume 2.

5 Summary and Conclusion

The survey results demonstrated that The Outer Banks is a mature destination with a strong product and a loyal customer base. Some key findings were:

- Visitor satisfaction is very high, and has been sustained at that level from The Outer Banks' previous survey in 2006
- The majority of visitors (64 percent) are repeat visitors, and the average repeat visitor is making their sixth trip to The Outer Banks
- More than 93 percent of visitors are in The Outer Banks for pleasure/vacation
- Ninety-five percent of visitors stay for one or more nights; only five percent come for the day only
- The average duration of stay for those visitors who stay overnight is 5.8 nights
- The average party size is 5.4, varying from a high of 6.6 in the summer months to a low of 3.4 in the winter

Nonetheless, there are some areas with the potential for improvement or revenue enhancement.

- Although still very positive, upper income level visitors are less satisfied with restaurant, shopping, and night-time activity options than other age groups.
- Overall, the income-range with the highest level of satisfaction across the attributes surveyed was the under $30,000 family income group.

These results suggest that there should be a market for at least some additional higher-end attractions.

1. Visitors were asked for suggestions on how The Outer Banks could be improved as a destination. 2,471 respondents provided feedback on what would enhance Outer Banks.

   Below are some of the more common suggestions mentioned:

   - Don't Change Anything /Everything great/Can't think of anything (306 respondents)
   - Improved Traffic Situation (278)
   - Recycling Program Improvement (123)
   - Signage Improvement (110)
   - Improved Ferry Services (90)
   - Additional Bridge Construction (77)
   - No Overbuilding/Increased Development (77)
   - More Dining Options (58)
   - More Night Life (58)

2. Many non-summer visitors expressed frustration with the number of closed attractions and irregular service hours in the early Spring and late Fall. What they found especially disappointing were:

   - Inaccurate postings of store and restaurant hours, i.e., not adhering to the hours "Open" posted on their websites or doors/signs

- The number of closed establishments, and in particular
- Closures of lighthouses, or inability to climb to the top.

The MAI team notes that The Outer Banks Visitors Bureau has been working for some time to increase visitation in the spring and summer seasons. This is a classic “chicken and egg” situation: visitors will come only if a certain “critical mass” of attractions are open, while attractions can remain open only if there is a sufficient volume of visitors to sustain them.

There is no immediately obvious solution to this challenge. The Outer Banks may wish to consider a new program to encourage more spring and fall visitation. Local businesses could be recruited to participate in, for example, a special Springtime in OBX or Fall OBX Adventures publicity campaign in exchange for:

- A commitment to strictly adhere to their advertised open-for-business hours and open-for-business days of the week during those periods,
- Opening restaurants and the lighthouses for special holiday weeks or long weekends in the early spring and late fall, such as for “Valentine’s Day Romance in OBX Weekend,” “OBX Spring Break/Easter Week Getaways,” “Thanksgiving in OBX,” etc., and
- Participation in new promotional efforts developed around additional activities such as deep shoulder season Sport Fishing Tournaments, sailing races, or bicycle races.

The fact that the average duration of visits in the spring and summer has increased since the 2006 survey is an encouraging sign that additional progress can be made. Over the same timeframe, however, the average length of winter visits has decreased from 5.2 to 3.8 days. This suggests that similar programs focused on the winter months may also be worth considering.

6 APPENDIX 1: Visitor Survey Form

Outer Banks Visitors Bureau Survey 2014

<u>FOR INTERNAL USE ONLY:</u> Interview Date_________ Interviewer_______________
Location/Island_________
Male____ Female____ Stayed at least one night? ______ Yes ______ No
Resident of the Outer Banks? ____No Visitor 18 or older? _____Yes
Work in the Outer Banks Visitor Industry? ____No
Arrival Month_____________________

---

1. Which towns did you visit during this trip? How many nights did you stay? (Please include towns you plan to visit/stay during this trip.)

Southern Shores	Stayed _____ nights	Day trip only_______
Duck	Stayed _____ nights	Day trip only_______
Kitty Hawk	Stayed _____ nights	Day trip only_______
Kill Devil Hills	Stayed _____ nights	Day trip only_______
Nags Head	Stayed _____ nights	Day trip only_______
Manteo	Stayed _____ nights	Day trip only_______
Wanchese	Stayed _____ nights	Day trip only_______
Rodanthe	Stayed _____ nights	Day trip only_______
Waves	Stayed _____ nights	Day trip only_______
Salvo	Stayed _____ nights	Day trip only_______
Avon	Stayed _____ nights	Day trip only_______
Buxton	Stayed _____ nights	Day trip only_______
Frisco	Stayed _____ nights	Day trip only_______
Hatteras Village	Stayed _____ nights	Day trip only_______

2. Was this your first trip to The Outer Banks?

____Yes (skip to question 3) ____No (please answer 2b, 2c, and 2d)

2b) How many times have you visited? _____________________

2c) When was your last visit?

_____ Within the past year _____ 1 to 2 years ago _____ More than 2 years ago

2d) Did you stay in the same area before? _____Yes _____No

If no, which town did you stay in previously? _____________________

3. **What was the main purpose of your trip? (Please check only one)**

_____ Pleasure / vacation
_____ Business
_____ Meeting / conference
_____ Wedding or honeymoon
_____ Sports activity
_____ Special event (Please provide name or type of event):___________________

4. **Are you traveling with companions? (Please check all that apply)**

_____ Traveling alone
_____ Spouse
_____ Parent(s) or grandparent(s) _____ Other relatives _____ Another family
_____ Business associate _____ Friend(s) _____ Tour group
_____ Children. How many children are traveling with you?
(Please record number in each age group. If none, please leave blank.)
____ 0-1 year _____2-6 years ____7-12 years ____13-18 years ____19+ years

5. **Where did you stay while visiting? (Please check all that apply)**

_____ Hotel / motel
_____ Rental house
_____ Bed & breakfast inn
_____ Cottage court
_____ Campground
_____ Condo / timeshare
_____ With family or friends
_____ Other (Please specify):____

6. **How did you get to The Outer Banks? (Please check all that apply)**

_____ Car
_____ Airplane
_____ RV
_____ Ferry
_____ Bus
_____ Other (Please specify):____

7. **How easy was it to access The Outer Banks?**

_____ Not easy
_____ Somewhat easy
_____ Very easy

8. What were your sources of information about traveling to The Outer Banks? (Please check all that apply)

_____ I have visited before
_____ Travel agency
_____ Outer Banks website
_____ Facebook page
_____ Travel guidebook
_____ Magazine ad or article
_____ Newspaper
_____ Newsletter
_____ Other (Please specify):____
_____Recommended by friends/relatives
_____Special promotion or campaign
_____Internet ad
_____Website of rental company
_____Posters, signs or billboards
_____TV program or ad
_____Co-worker/company travel department

9. What attracted you to travel to The Outer Banks? (Please check all that apply)

_____ Open natural area
_____ Beach, ocean
_____ Water sports
_____ Golf
_____ Festival or other special event
_____ Shopping
_____ Visit friends or relatives
_____ Short travel time
_____ Site for a wedding
_____ Good place for a honeymoon
_____ Competitive sports event
_____ Other outdoor activities / recreation
_____ Lighthouses
_____ Nature activities
_____ Scuba diving
_____ Fishing
_____ Historical sites
_____ Company meeting / conference
_____ Business trip
_____ Safe place to visit
_____ Friend or relative's wedding
_____ Study / educational tour
_____ Inexpensive travel cost
_____ National Park Service sites

10. How unique are the undisturbed views and night skies at The Outer Banks? (Please circle the number which best expresses your feeling. A "3" means you feel they are very unique, while a "-3" means you feel they are not unique.)

	Very Unique						Not Unique
Undisturbed views	3	2	1	0	-1	-2	-3
Night skies	3	2	1	0	-1	-2	-3

11. How important are the undisturbed views and night skies to you? (Please circle the number which best expresses your feeling. A "3" means they are very important to you, while a "-3" means they are not important to you.)

	Very Important						Not Important
Undisturbed views	3	2	1	0	-1	-2	-3
Night skies	3	2	1	0	-1	-2	-3

12. How much are recycling efforts, energy conservation, and green programs a factor in determining your vacation destination? (Please circle the number which best expresses your feeling. A "3" means they are very important to you, while a "-3" means they are not important to you.)

	Very Important						Not Important
Recycling efforts	3	2	1	0	-1	-2	-3
Energy conservation	3	2	1	0	-1	-2	-3
Green programs	3	2	1	0	-1	-2	-3

13. What activities did you/will you actually do during your stay at The Outer Banks? (Please check all that apply)

______ Beach
______ Scenic drives
______ Lighthouses
______ Hiking
______ Surfing
______ Parasailing
______ Hang gliding
______ Kayaking / canoeing
______ Boating
______ Beach / off-road driving
______ Tennis
______ Scuba diving
______ Water sports
______ Golf
______ Ferry
______ Business meeting / conference
______ Study / educational tour
______ Competitive sports event
______ Jennette's Pier

______ Wildlife preserve / bird watching
______ National parks
______ Museums / historic sites
______ Biking
______ Kite boarding
______ Kite flying
______ Camping
______ Shipwrecks
______ Fishing from beach or pier
______ Charter / boat fishing
______ Art gallery
______ Theater performance
______ Concert or musical performance
______ Festival or other special event
______ Shopping
______ Dining at restaurants unique to the area
______ Wedding
______ Aquarium at Manteo
______ Other Aquariums

14. How satisfied were you with your experiences while visiting? (Please circle the number which best expresses your feeling. A "3" means you were very satisfied with your experience, while a "-3" means you were very dissatisfied with your experience. If you did not use, please circle the "X.")

	Very Satisfied						Very Dissatisfied	Did Not Use
Accommodations	3	2	1	0	-1	-2	-3	X
Beaches	3	2	1	0	-1	-2	-3	X
Scenery	3	2	1	0	-1	-2	-3	X
Ease of local travel	3	2	1	0	-1	-2	-3	X
Availability of signs & directions	3	2	1	0	-1	-2	-3	X
Safety	3	2	1	0	-1	-2	-3	X
Variety of things to do	3	2	1	0	-1	-2	-3	X
Night time activities	3	2	1	0	-1	-2	-3	X
Shopping	3	2	1	0	-1	-2	-3	X
Restaurants	3	2	1	0	-1	-2	-3	X

15. Do you have any suggestions for what you would like to see improved? (Please write your comments in the space below.)

---

16. Please rate the following statements. (Please circle the number which best expresses your feeling. A "3" means you strongly agree, while a "-3" means you strongly disagree.)

	Strongly Agree						Strongly Disagree
I would like to visit again.	3	2	1	0	-1	-2	-3
I will recommend The Outer Banks to others.	3	2	1	0	-1	-2	-3

17. Please rate the seasons you would like to visit The Outer Banks. (Please circle the number which best expresses your feeling. A "3" means you strongly agree you would like to visit during that season, while a "-3" means you strongly disagree that you would like to visit during that season.)

	Strongly Agree						Strongly Disagree
Fall	3	2	1	0	-1	-2	-3
Winter	3	2	1	0	-1	-2	-3
Spring	3	2	1	0	-1	-2	-3
Summer	3	2	1	0	-1	-2	-3

18. Were you satisfied with the price you paid for your accommodations and activities? (Please circle the number which best expresses your feeling. A "3" means you considered the item to be very inexpensive while a "-3" means you consider the item to be very expensive. Circle the "X" if you did not experience an activity.)

	Very Inexpensive						Very Expensive	Did Not Use
Accommodations	3	2	1	0	-1	-2	-3	X
Shopping	3	2	1	0	-1	-2	-3	X
Dining	3	2	1	0	-1	-2	-3	X
Historic attractions / museums	3	2	1	0	-1	-2	-3	X
Indoor activities	3	2	1	0	-1	-2	-3	X
Outdoor activities	3	2	1	0	-1	-2	-3	X

TRAVEL EXPENSES. To help us understand what people spend while visiting The Outer Banks, we would like to ask about your expenses during your stay. If you were responsible for paying for other people, please state the total number of people included in these expenditures. Your answers will be kept confidential.

19. How much did you pay for your lodging (including taxes)?_______________

19b) How many people are included in your expenditure estimate above?
________(Number)

20. Please estimate your total trip expenses for everyone included above in the categories below. Report all expenditures (including taxes and all forms of payment). If nothing was spent, record zero ("0").

AMOUNT ($ US Dollars)		Don't know (check)
$____________	Restaurants/bars	_______
$____________	Food/beverage purchases in grocery stores	_______
$____________	Entertainment / theatre	_______
$____________	Other attractions	_______
$____________	Gifts /souvenirs / shopping	_______
$____________	Transportation	_______
$____________	Rentals (sports gear, bicycles, etc.)	_______
$____________	Other expenses not covered above	_______

DEMOGRAPHIC DATA. Please allow us to ask you a few questions for statistical purposes. Your answers will be kept confidential.

21. What is your marital status?

_____ Married
_____ Single, never married
_____ Divorced
_____ Widowed

22. In what year were you born? _________

23. What is your home zip code?

U.S. zip code__________________
I live outside the U.S. (name country)____________________

24. What is the highest level of formal education you have completed? (Please check only one.)

___Elementary or middle school
___High school
___College
___Graduate school

25. What is your occupation? (Please check only one.)

____ Government employee
____ Professional or technical
____ Manager or administrator
____ Sales worker/clerical
____ White collar office worker
____ Crafts-worker
____ Machine operator or laborer
____ Farmer, farm manager or farm laborer
____ Service worker
____ Military personnel
____ Self-owned business
____ Student
____ Housewife
____ Unemployed
____ Retired
____ Other

26. What is your household's approximate annual income before taxes? (Please check only one.)

___ Less than $30,000 annually
___ $30,000 – 69,999
___ $70,000 – 109,999
___ $110,000 – 149,999
___ $150,000+
___ Retired
___ Decline to state

27. Please select your race or ethnic identity.

_____ Hispanic or Latino
_____ White (not Hispanic or Latino)
_____ Black or African American (not Hispanic or Latino)
_____ Asian (not Hispanic or Latino)
_____ Native Hawaiian or Pacific Islander (not Hispanic or Latino)
_____ American Indian or Alaskan Native (not Hispanic or Latino)
_____ Two or More Races (not Hispanic or Latino)
_____ Decline to state

THANK YOU. THIS IS THE END OF THE SURVEY. PLEASE RETURN THIS QUESTIONNAIRE TO THE SURVEY FACILITATOR.