The Outer Banks®
VISITORS BUREAU

MONTHLY RESEARCH UPDATE

September 2026 Review

(877) 629-4386 One Visitors Center Circle, Manteo, NC 27954 www.outerbanks.org

EXECUTIVE SUMMARY

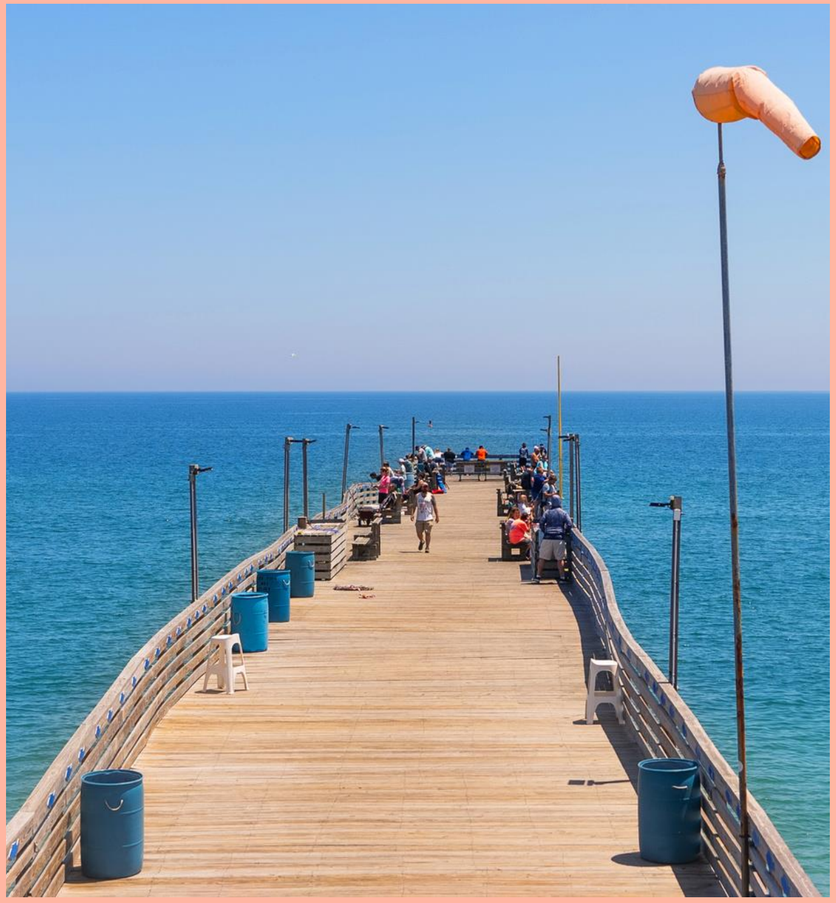
- In September, Demand among Dare County's short-term rental properties was basically flat compared to one year prior, as booked Guest Nights (Demand) increased slightly by 0.6% Year-over-Year (YoY). Owner Nights & Holds decreased by 5.0% YoY, while Nights Available (Supply) also declined, falling by 2.3% YoY. This yielded a 2.9% increase in Adjusted Paid Occupancy to average 64.3% for the month of September.
  - Northern Beaches and Roanoke Island saw Adjusted Paid Occupancy increase in September compared to last year. Rentals on Hatteras Island saw the highest average Adjusted Paid Occupancy at 67.6%, followed by Northern Beaches at 62.4%, and Roanoke Island at 60.4%.
  - Throughout Dare County, Average Daily Rate (ADR) rose by 2.2% YoY to $305 for the month. All three regions saw ADR increase, with Northern Beaches leading at $339, followed by Hatteras Island at $252, and Roanoke Island at $184.

- Guest Demand among Dare County hotels increased 3.1% YoY, causing Paid Occupancy to follow suit. Hotels averaged 82.1% Occupancy in September.
  - Hotel ADR increased significantly, up 6.9% YoY. Paired with higher room Demand, hotel Revenue rose an impressive 10.2% YoY to $3.6 million for the month.

- In-market visitor spending on Visa cards totaled $47.7 million in September 2026, a significant 16.0% increase compared to the same month last year. Domestic visitor spending accounted for the bulk of all visitor spend for the month at $47.5 million (+16.1% YoY), while international visitor spend totaled $235K (+1.2%) in September.
  - All top domestic origin markets increased spending in September compared to one year prior, largely due to the shift in the Labor Day holiday. Washington DC-area spending rose by 21.3% YoY, Virginia Beach-area spending increased by 17.7%, and Richmond-area spending grew by 24.1%.

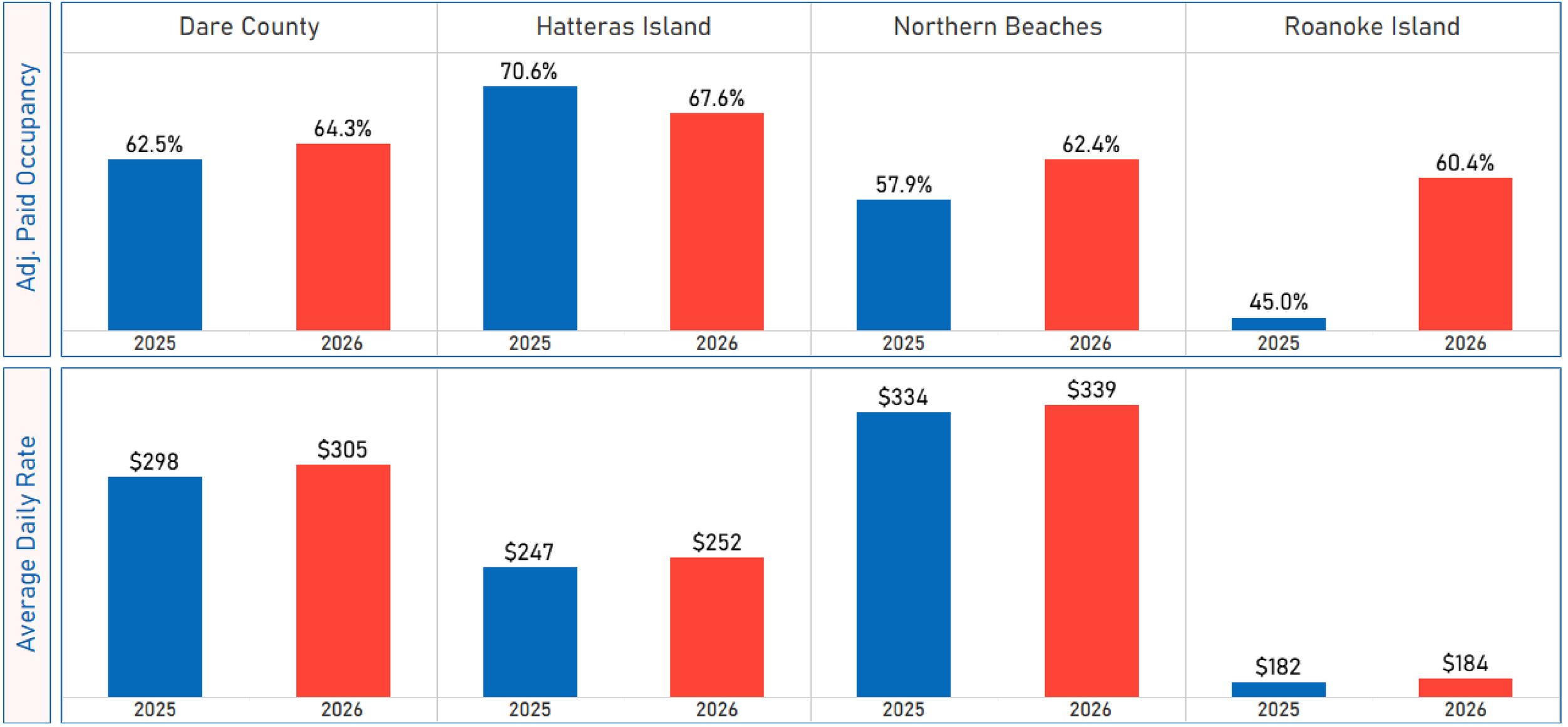
Sources: Key Data, Visa

HISTORICAL SHORT-TERM RENTAL DATA



Regional Comparison Monthly Short-Term Rental Performance
September 2026

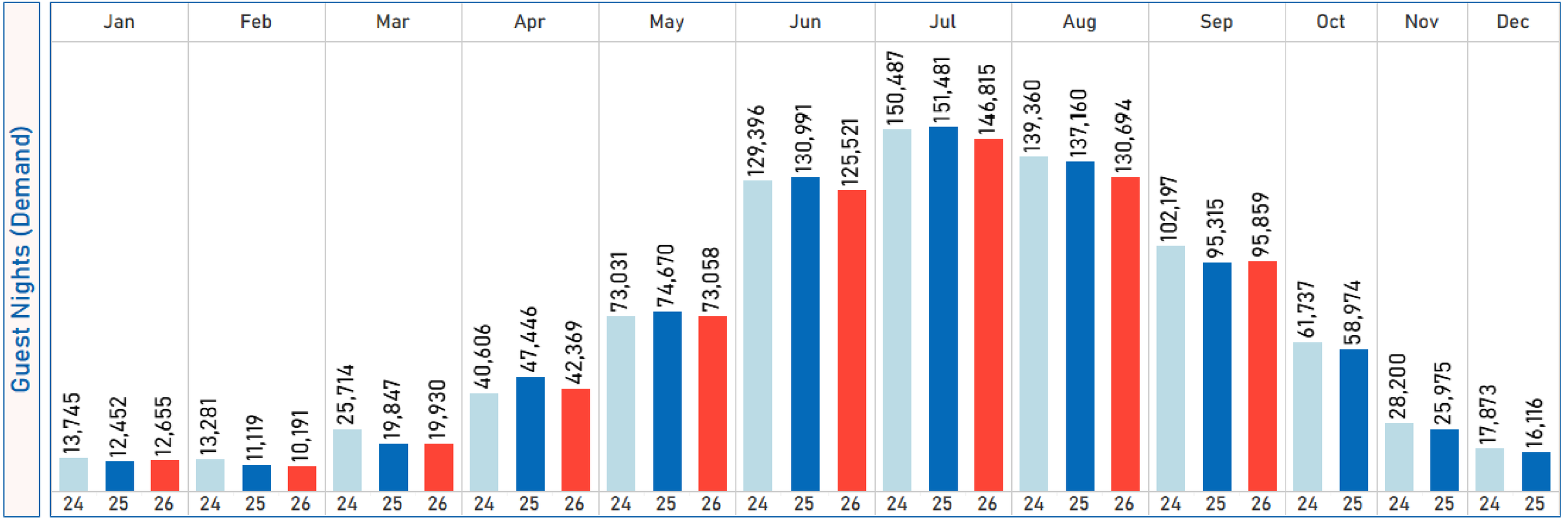
Source: KeyData



Dare County Monthly Short-Term Rental Performance
September 2026

Source: KeyData

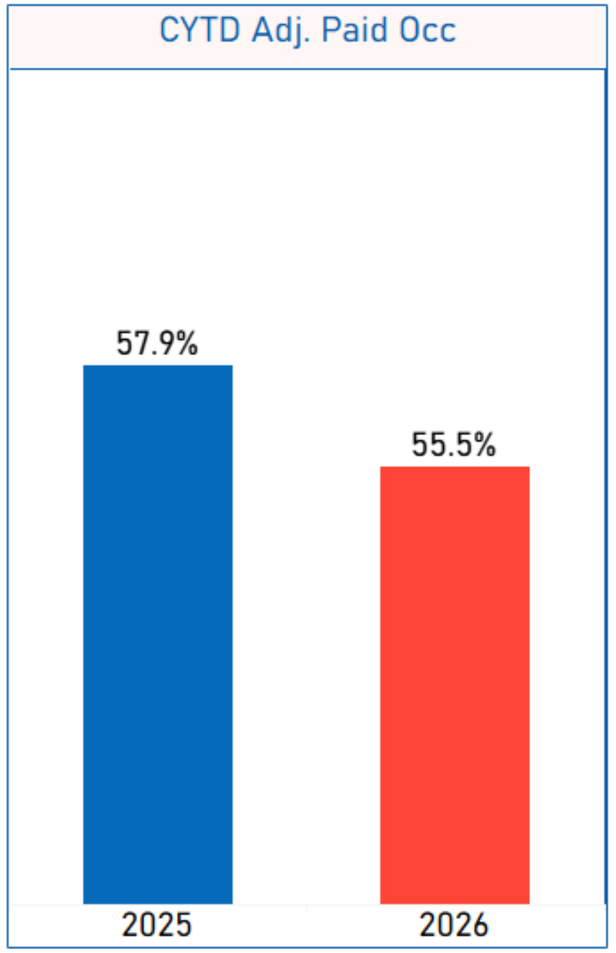
	Adj. Paid Occupancy	ADR	Adj. RevPAR	Nights Available	Guest Nights	Owner Nights & Holds	Avg. Total Stay Value
Sep '26	64.3%	$304.58	$195.74	149,161	95,859	38,235	$2,893.85
YOY	2.9%	2.2%	5.2%	-2.3%	0.6%	-5.0%	-2.6%

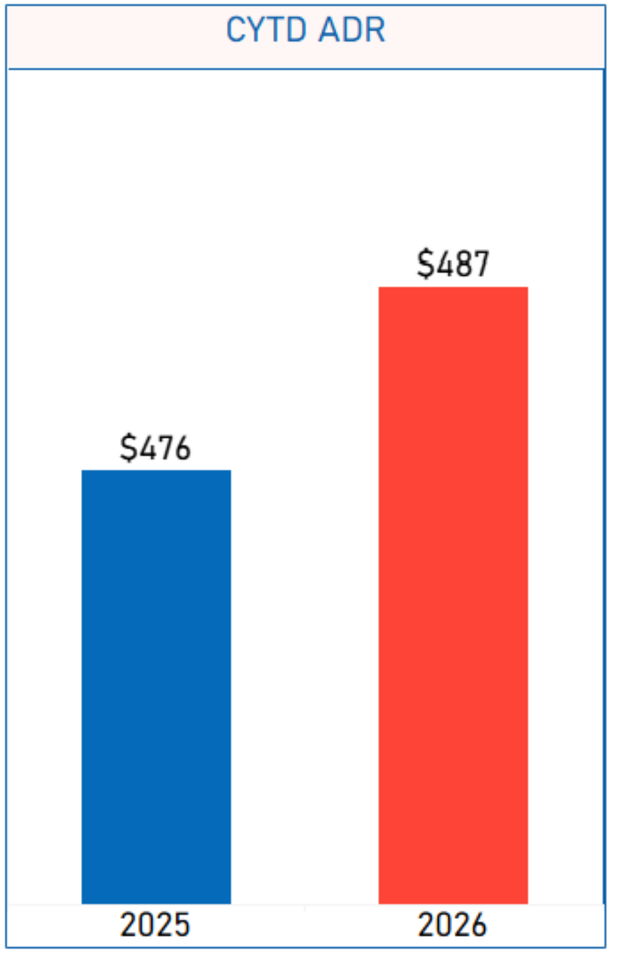


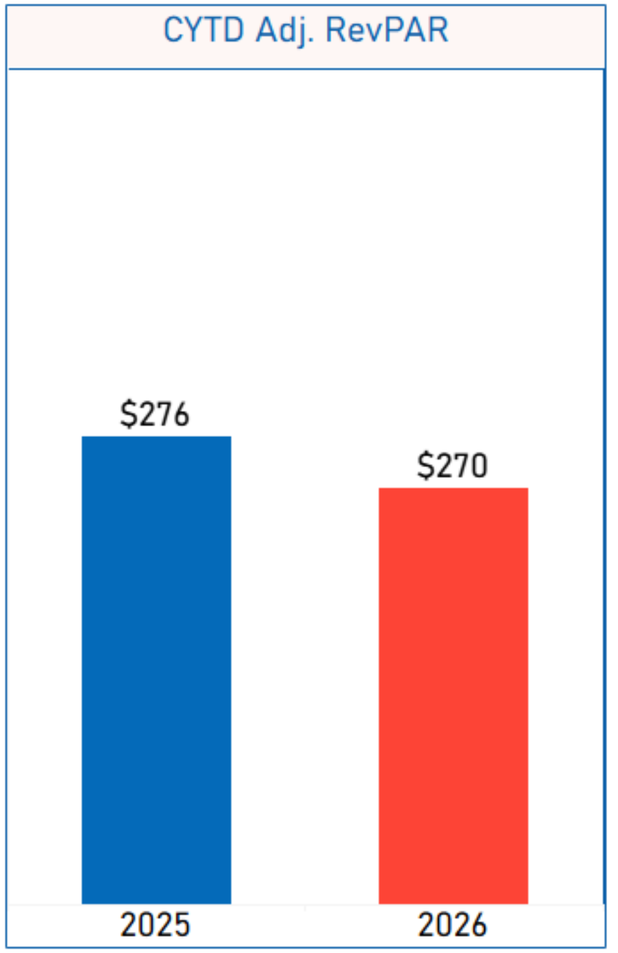
Dare County Monthly Short-Term Rental Performance
Calendar YTD Through September 2026

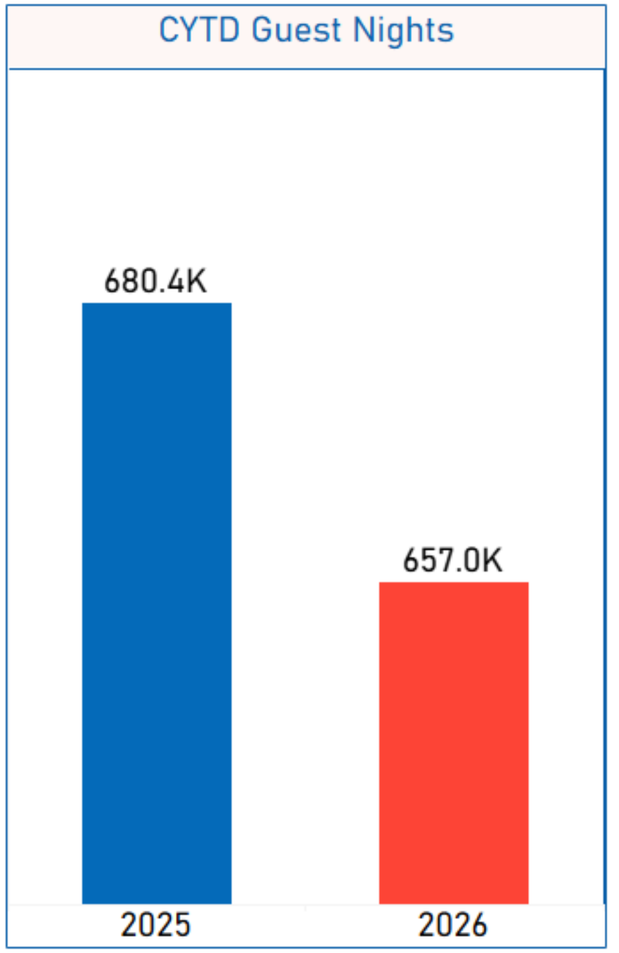
Source: KeyData

	Adj. Paid Occupancy	ADR	Adj. RevPAR	Nights Available	Guest Nights	Owner Nights & Holds	Avg. Total Stay Value
CYTD '26	55.5%	$487	$270	1,100.0K	657.0K	500.6K	$3,900
YOY	-4.1%	2.3%	-2.2%	0.0%	-3.4%	-9.3%	2.6%





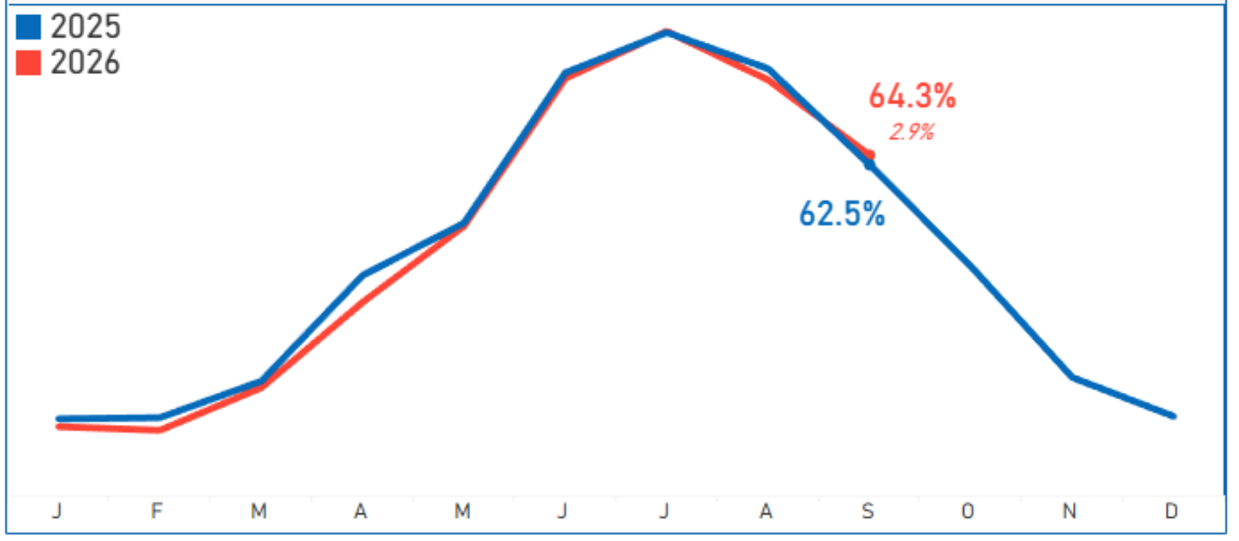




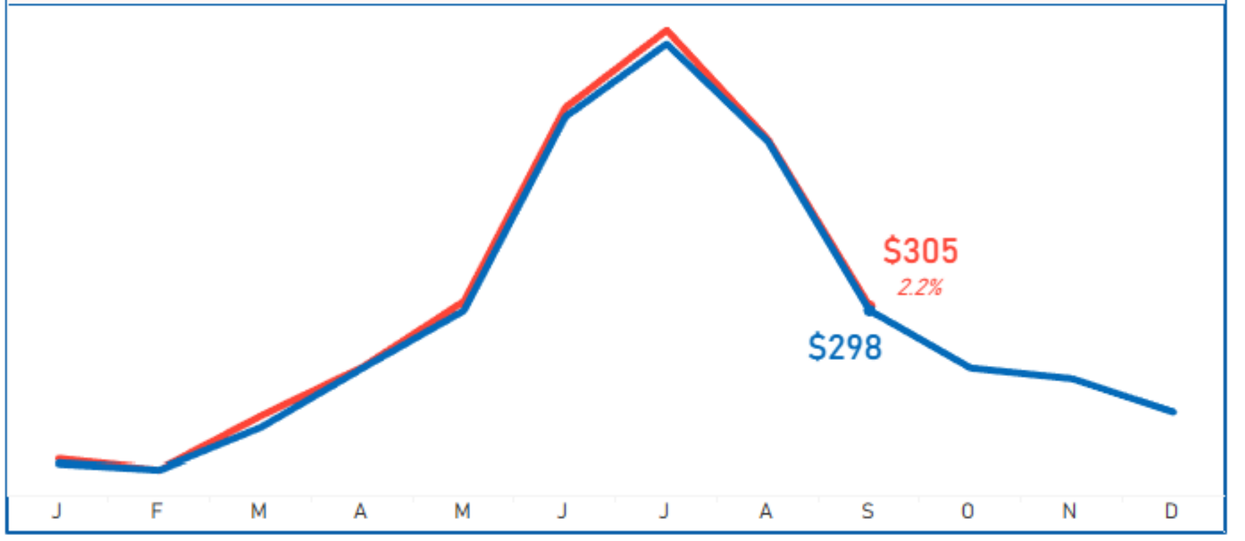
Dare County Monthly Short-Term Rental Performance
September 2026

Source: KeyData

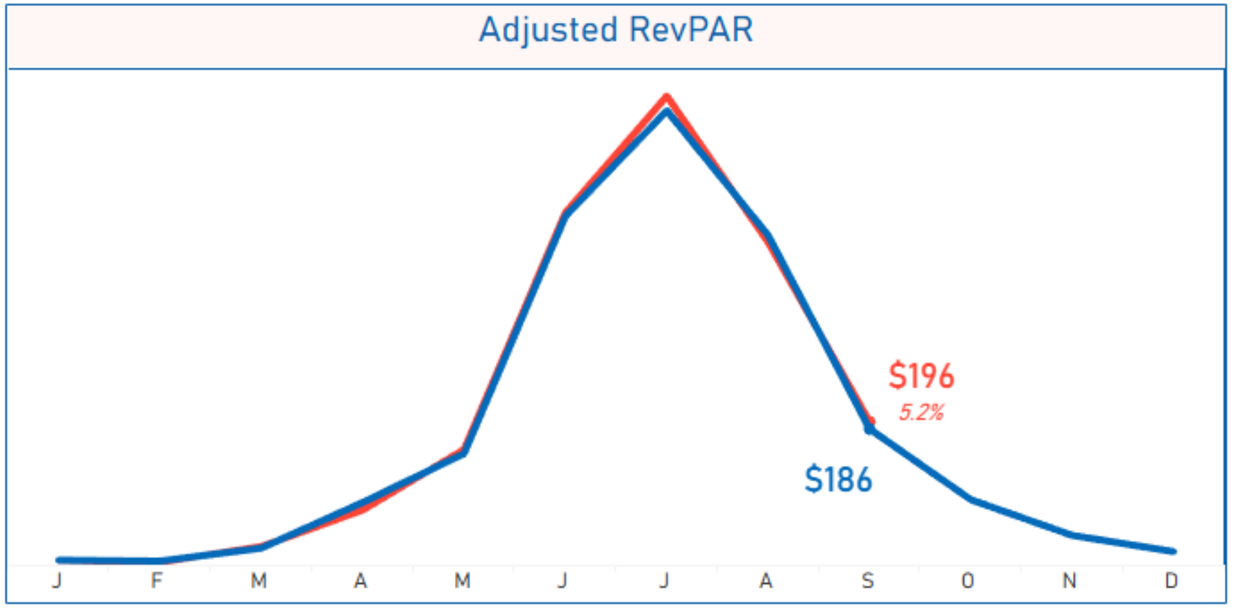
Adjusted Paid Occupancy



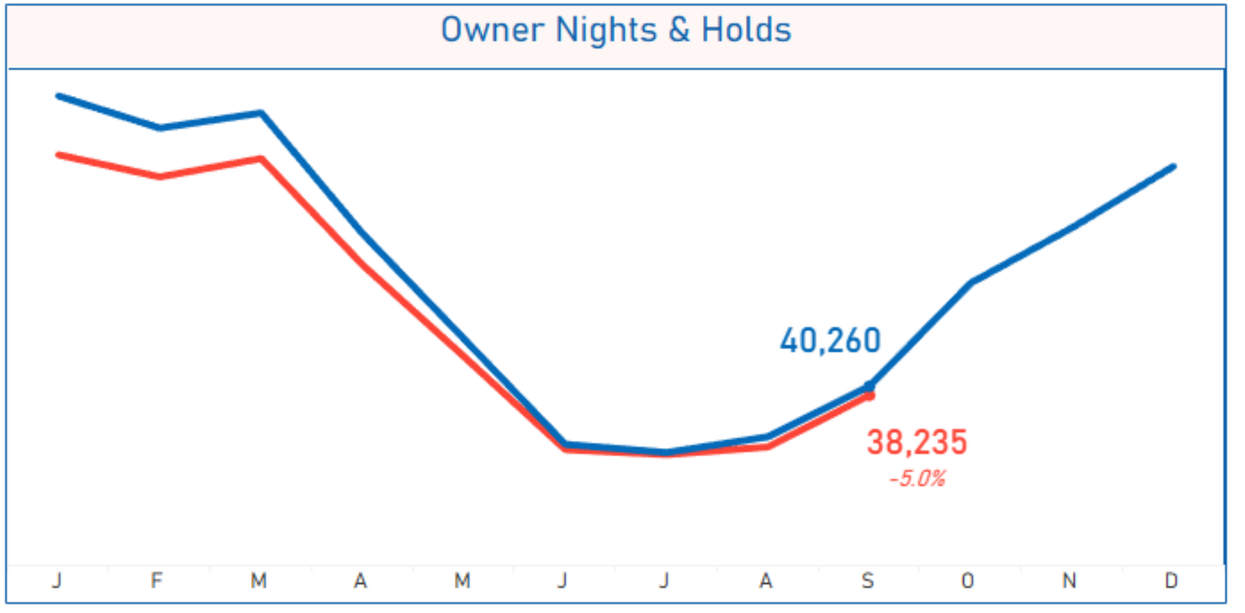
Average Daily Rate



Adjusted RevPAR



Owner Nights & Holds



HISTORICAL HOTEL DATA

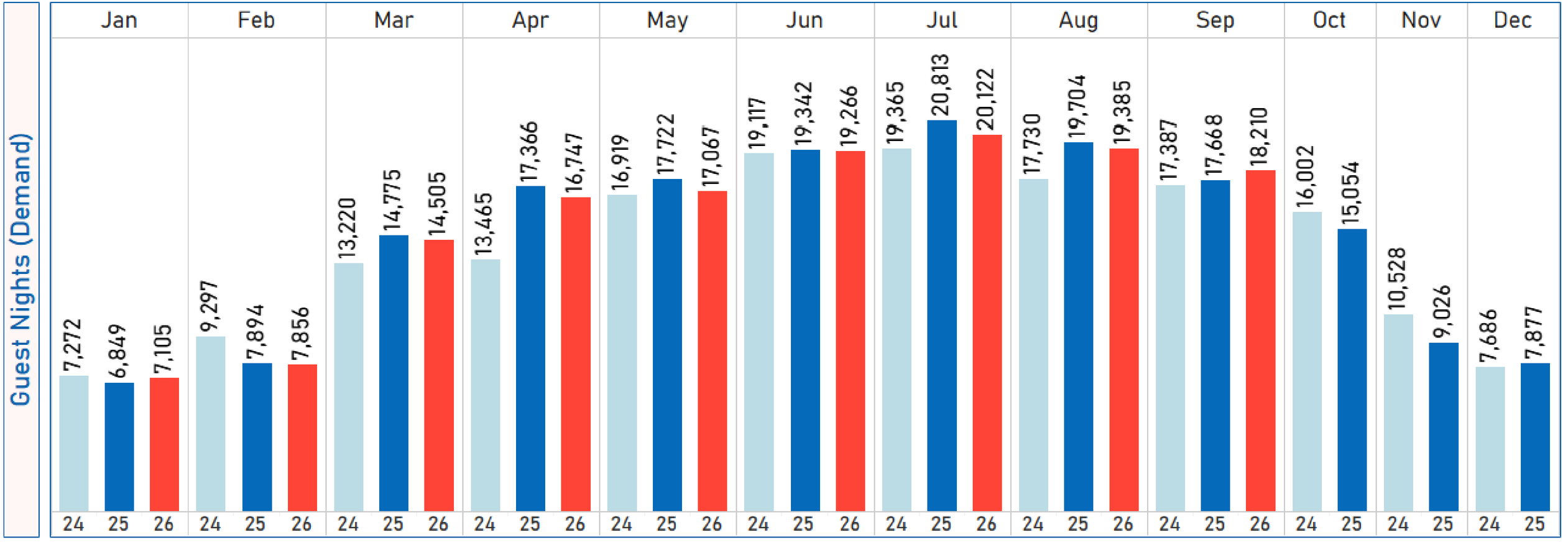


Dare County Monthly Hotel Performance

September 2026

Source: KeyData (sample: 12 hotels; 1,496 rooms)

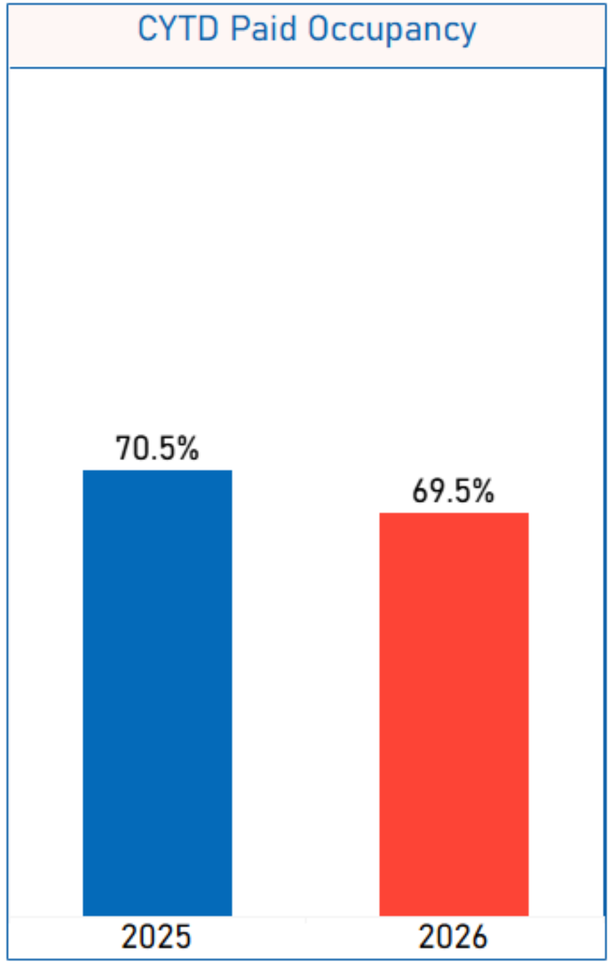
	Paid Occ	ADR	RevPAR	Guest Nights	Avg LOS	Avg Stay Value	Revenue
Sep '26	82.1%	$198.50	$163.04	18,210	2.3	$449.20	$3,614,691
YOY	3.1%	6.9%	10.2%	3.1%	-1.5%	6.7%	10.2%

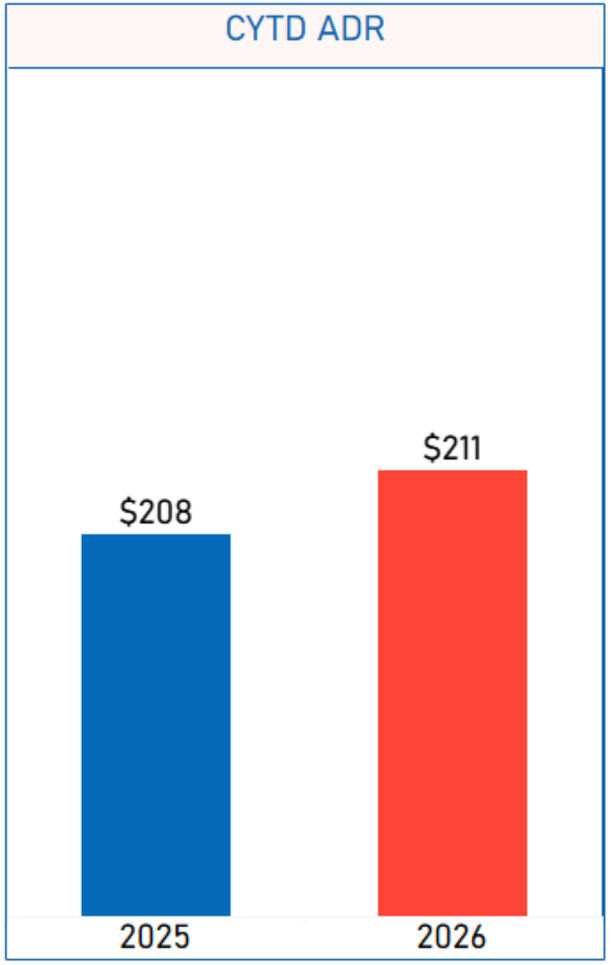


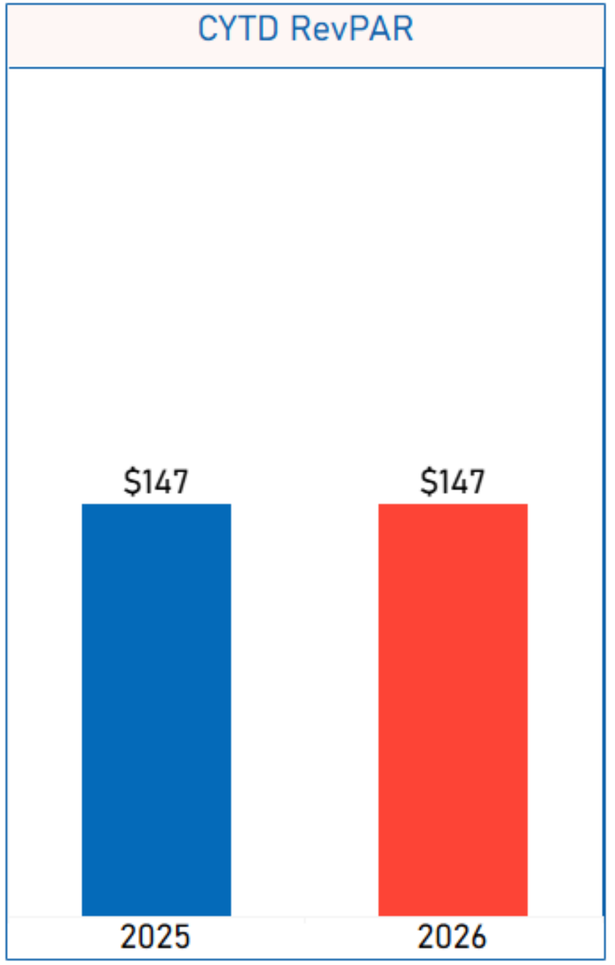
Dare County Monthly Hotel Performance
Calendar YTD Through September 2026

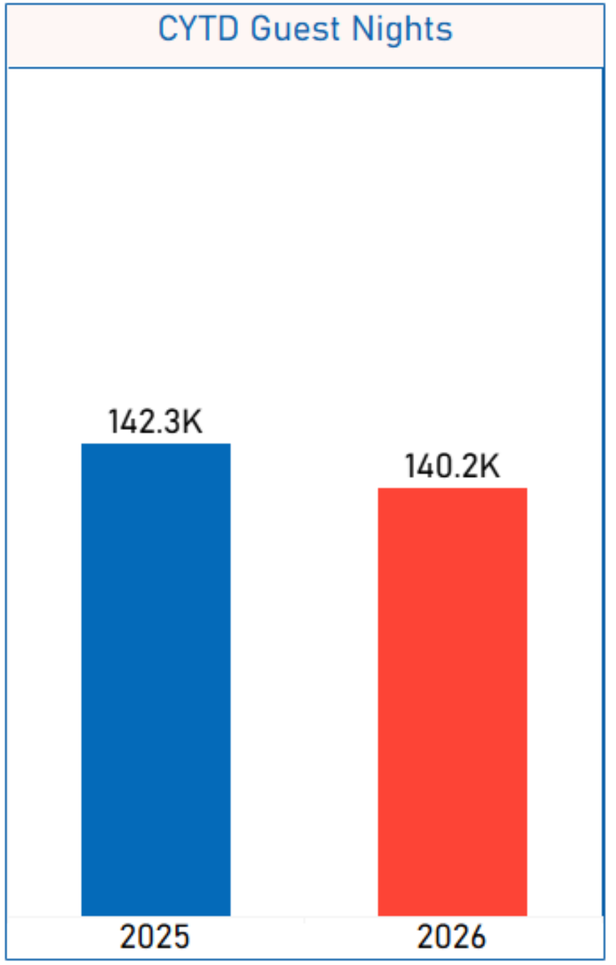
Source: KeyData (sample: 12 hotels; 1,496 rooms)

	Paid Occupancy	ADR	RevPAR	Guest Nights	Avg. LOS	Avg. Stay Value	Revenue
CYTD '26	69.5%	$211	$147	140.2K	2.2	$476	$29.6M
YOY	-1.4%	1.4%	0.0%	-1.5%	0.0%	3.9%	0.0%





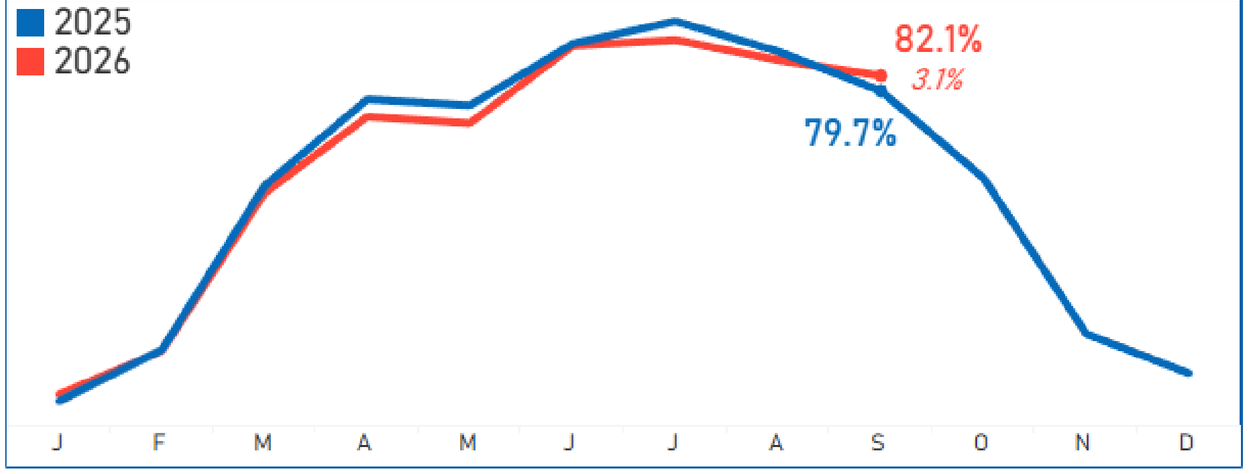




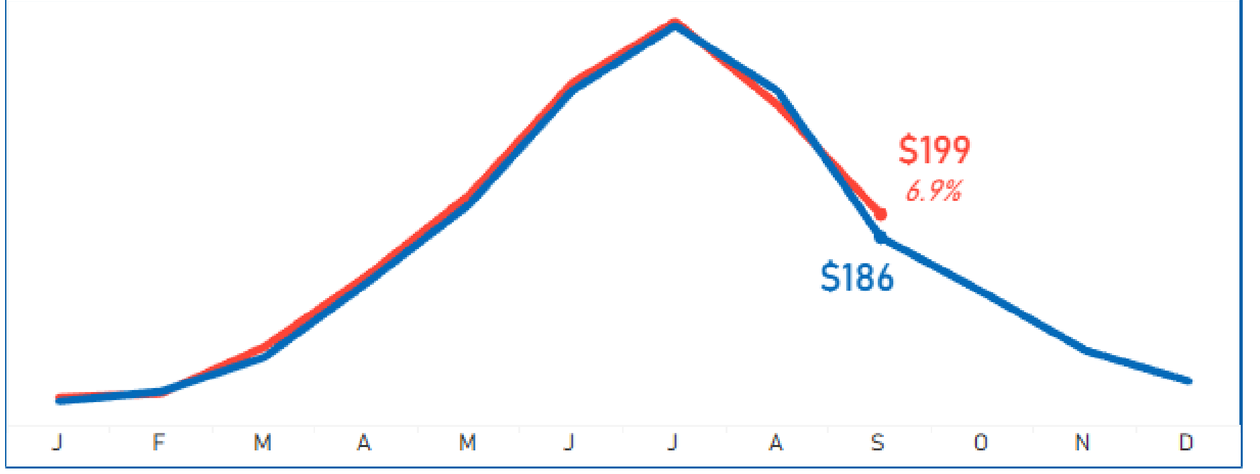
Dare County Monthly Hotel Performance
September 2026

Source: KeyData (sample: 12 hotels; 1,496 rooms)

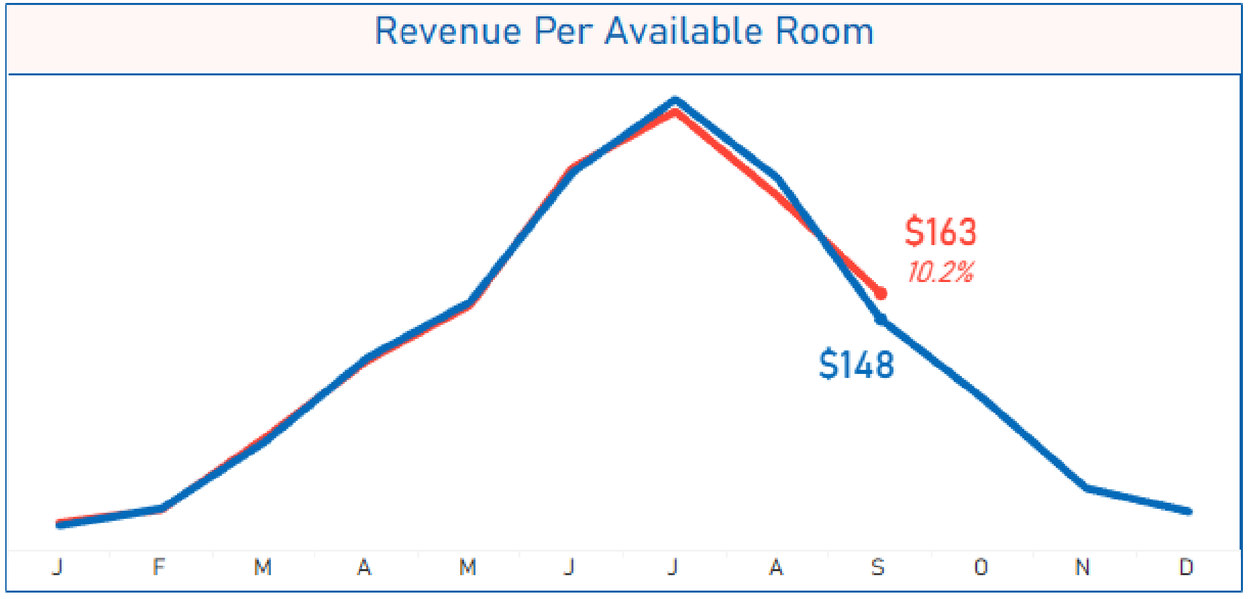
Occupancy



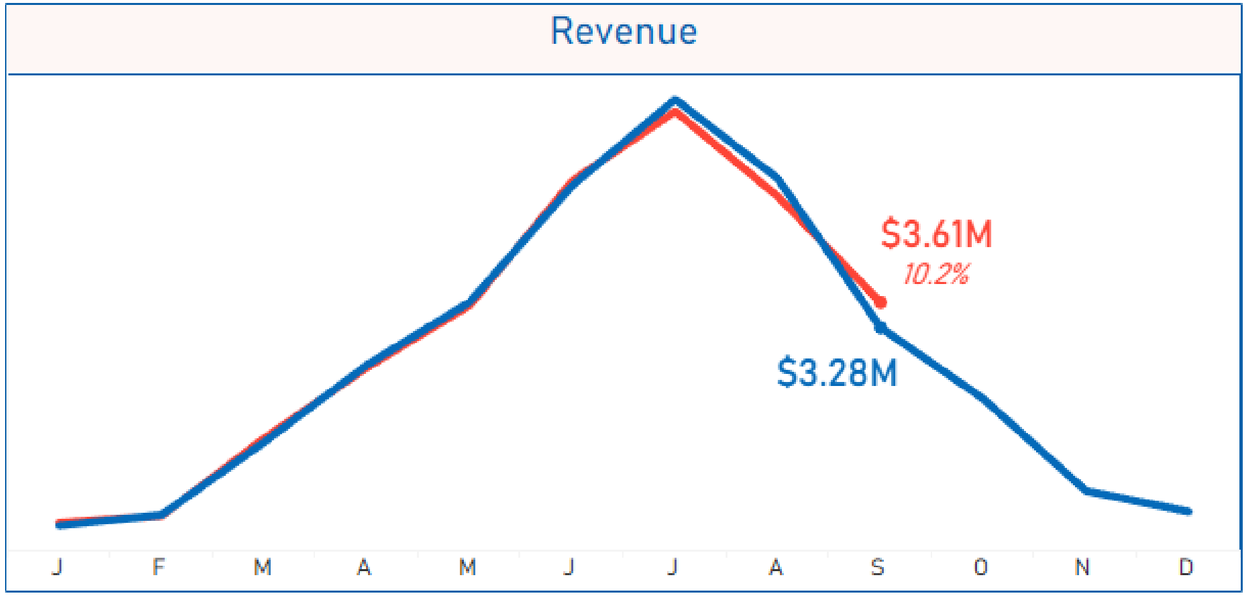
Average Daily Rate



Revenue Per Available Room

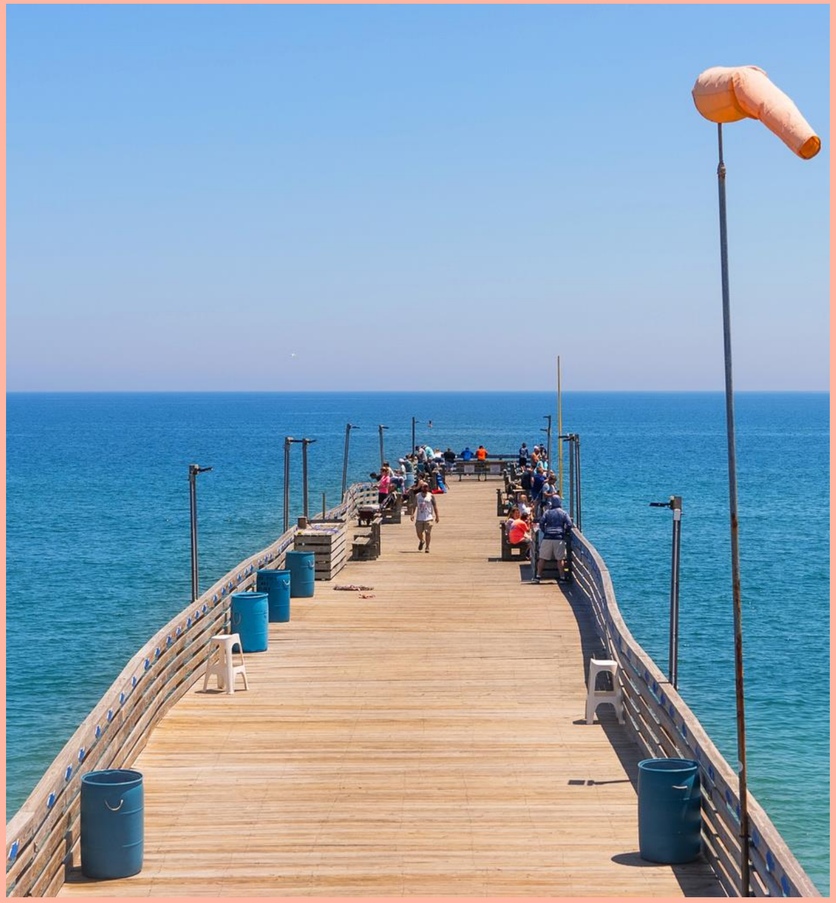


Revenue

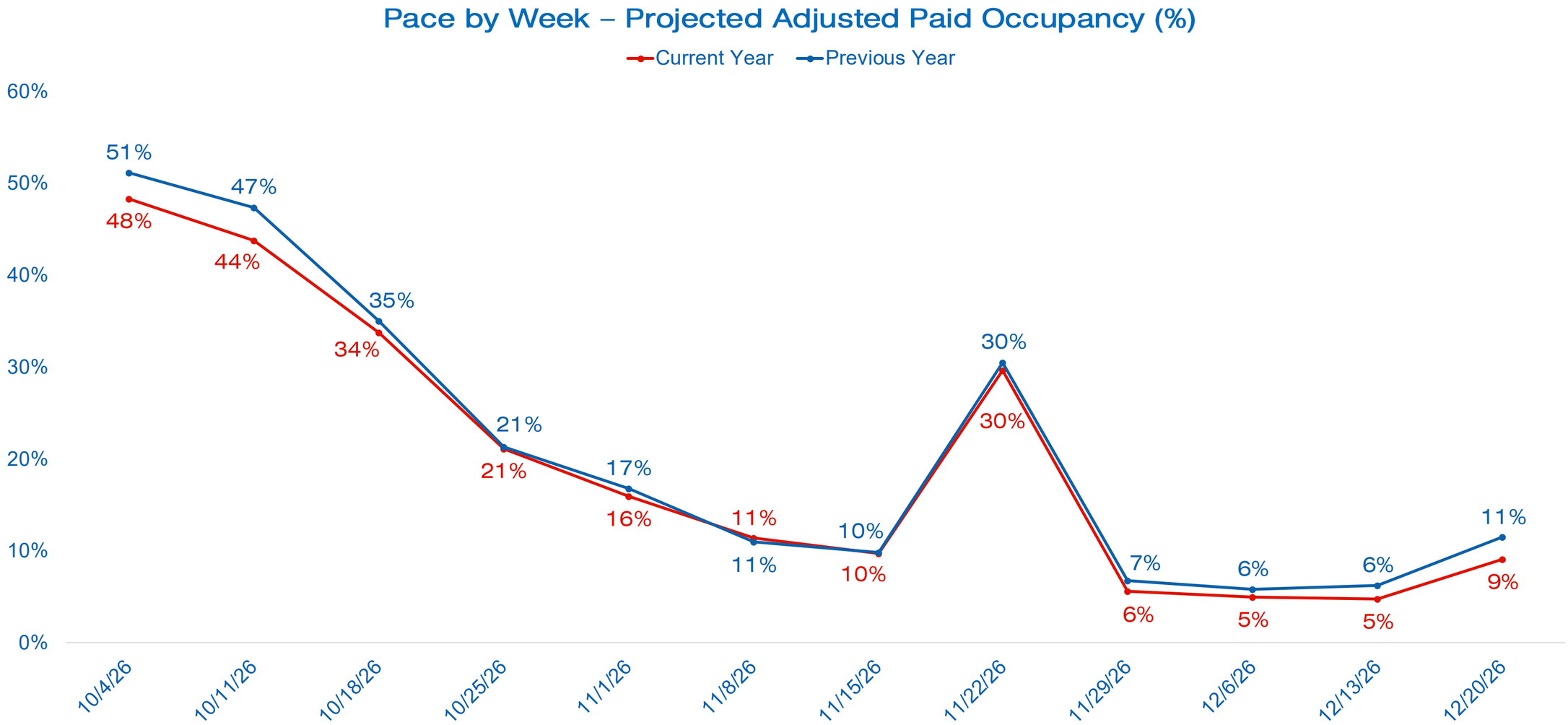


The Outer Banks Visitors Bureau

SHORT-TERM RENTAL PACING DATA

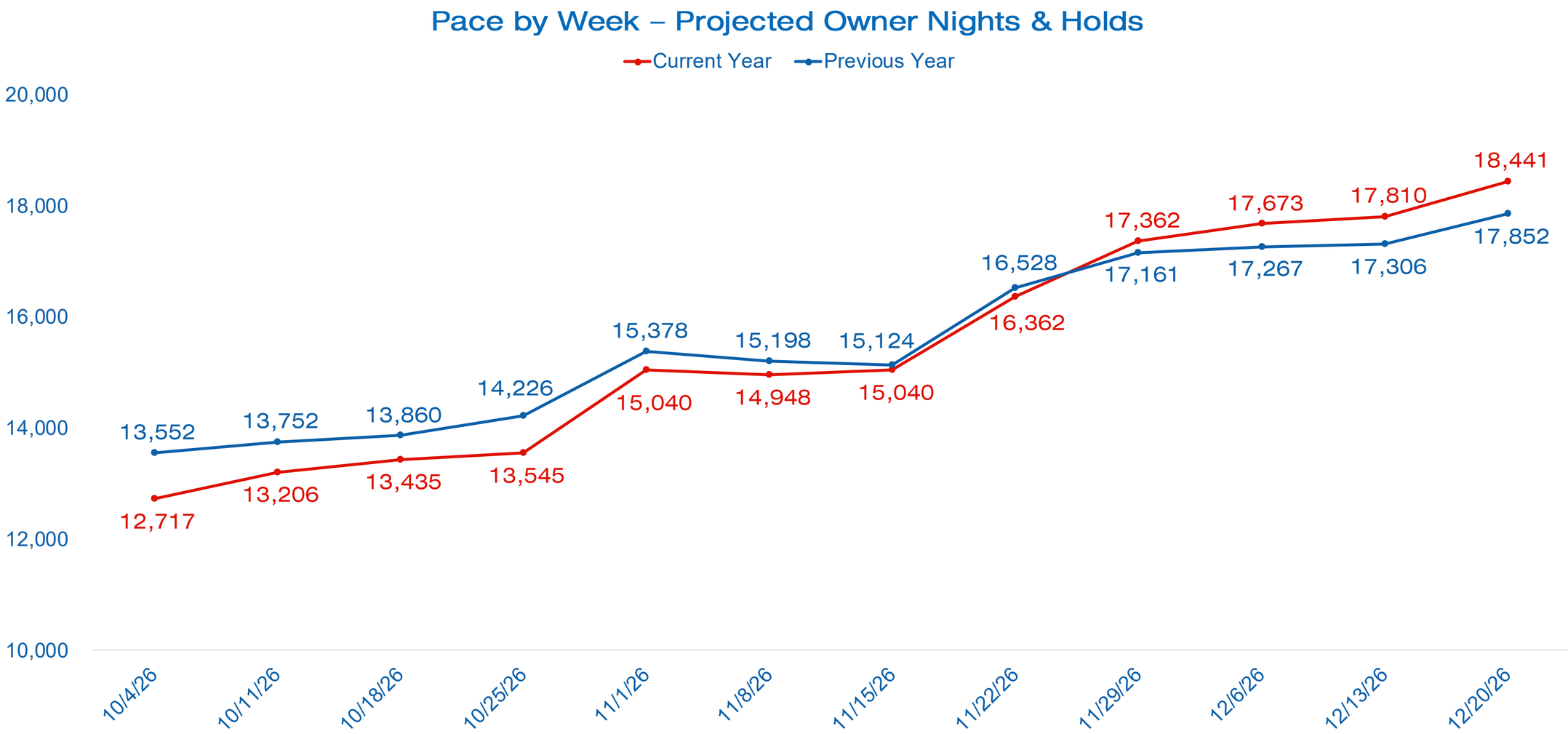


DARE COUNTY – PROJECTED ADJUSTED PAID OCCUPANCY BY WEEK



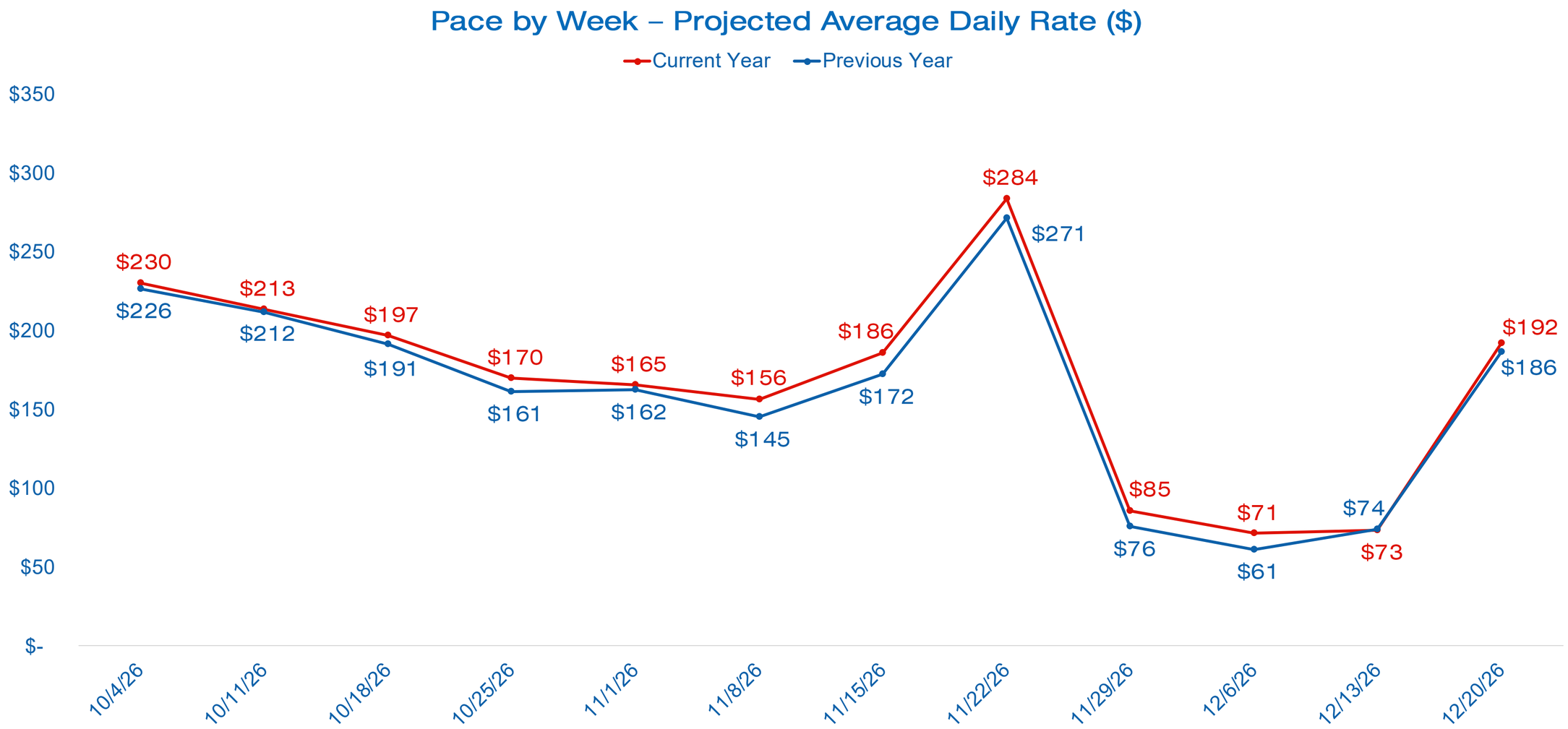
Source: Key Data (as of 10/5/2026)

DARE COUNTY – PROJECTED OWNER NIGHTS & HOLDS



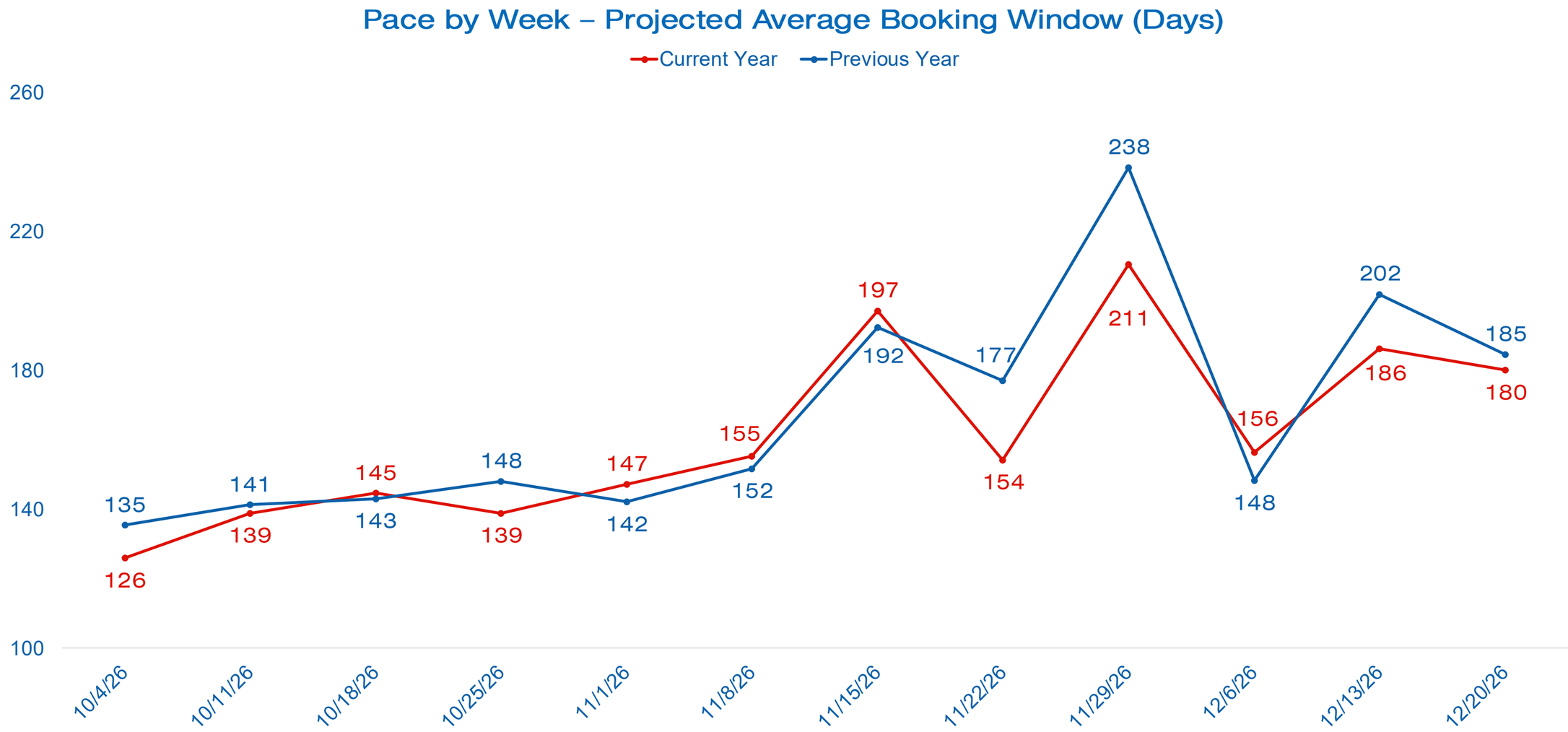
Source: Key Data (as of 10/5/2026)

DARE COUNTY – PROJECTED AVERAGE DAILY RATE



Source: Key Data (as of 10/5/2026)

DARE COUNTY – PROJECTED AVERAGE BOOKING WINDOW (DAYS)



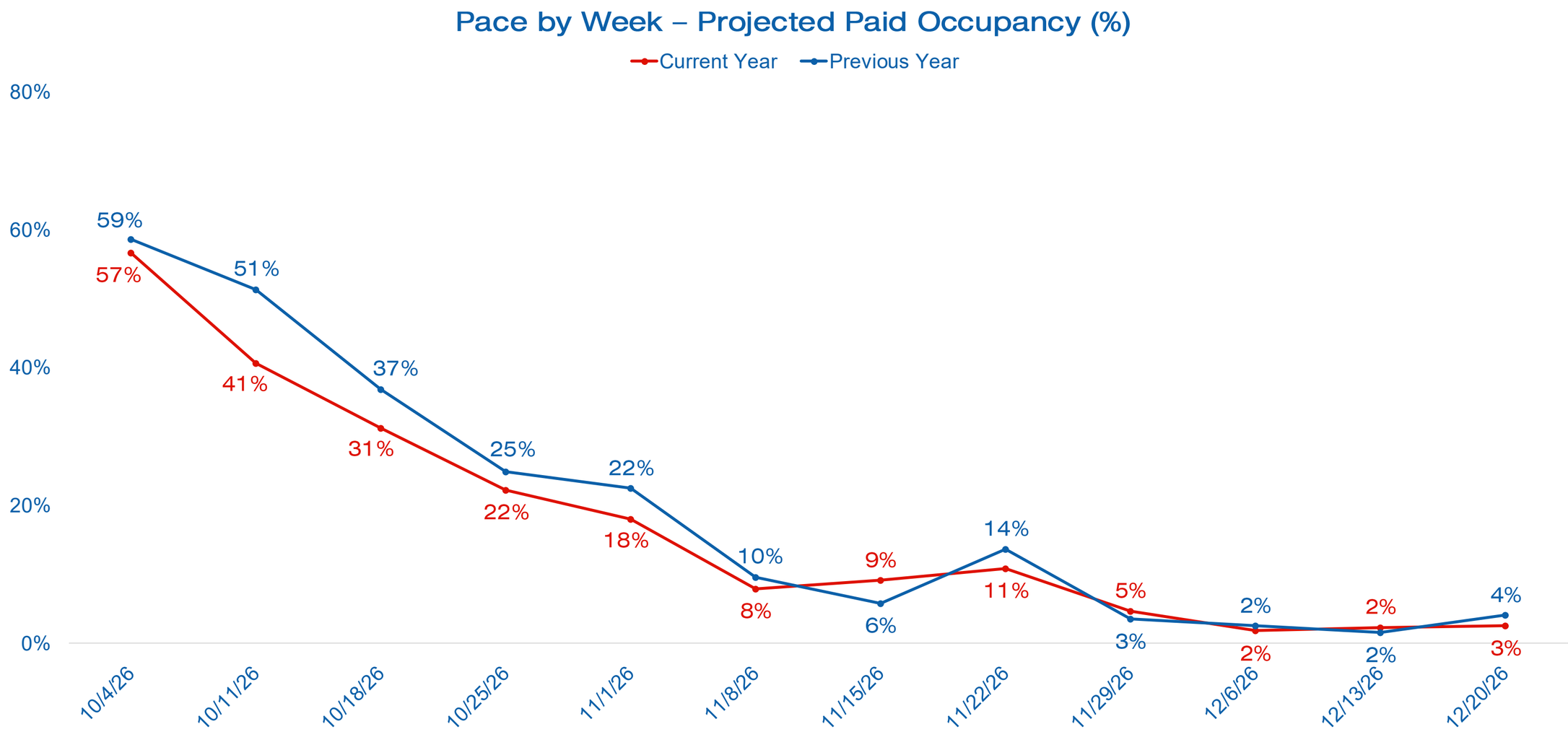
Source: Key Data (as of 10/5/2026)

The Outer Banks Visitors Bureau

HOTEL PACING DATA

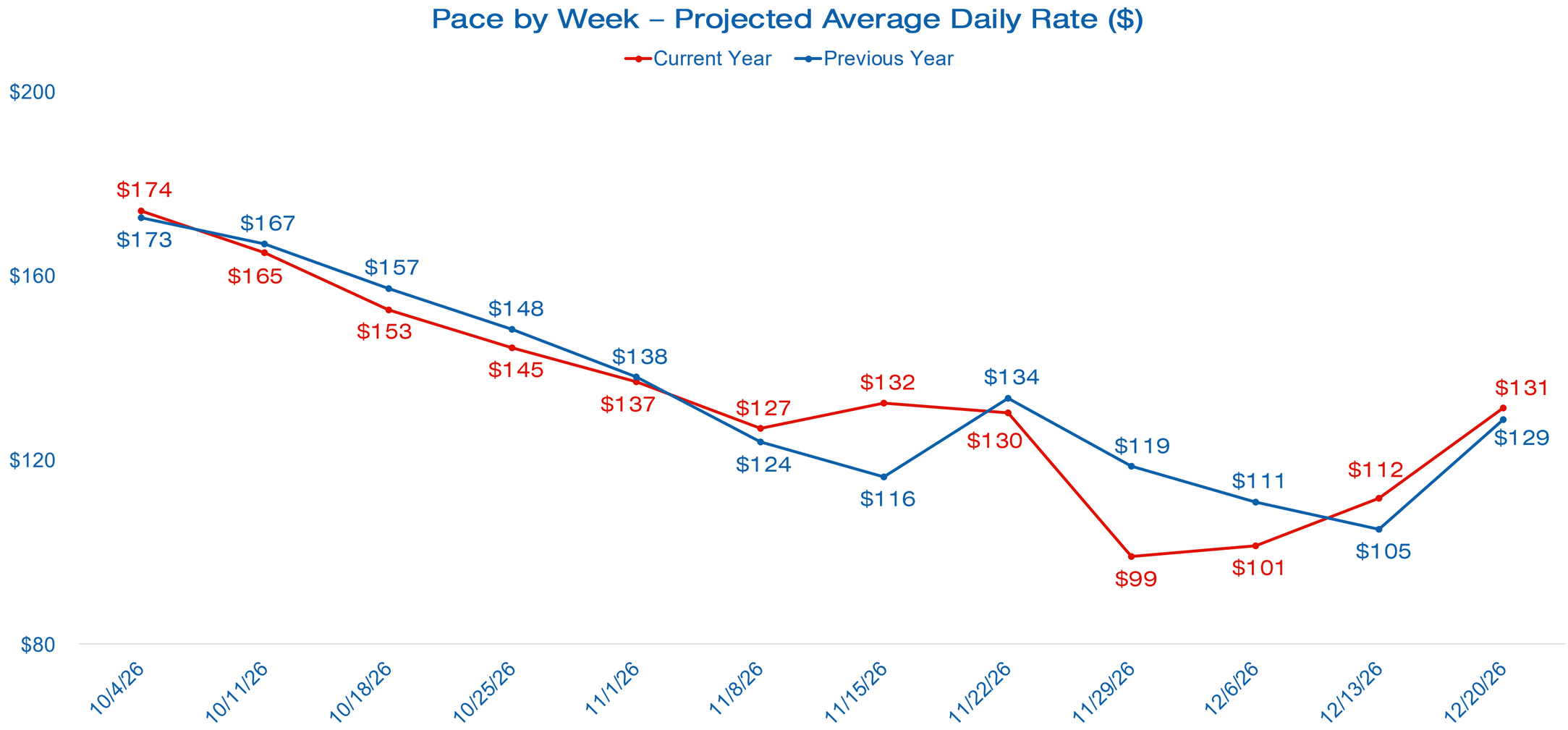


DARE COUNTY HOTELS – PROJECTED PAID OCCUPANCY



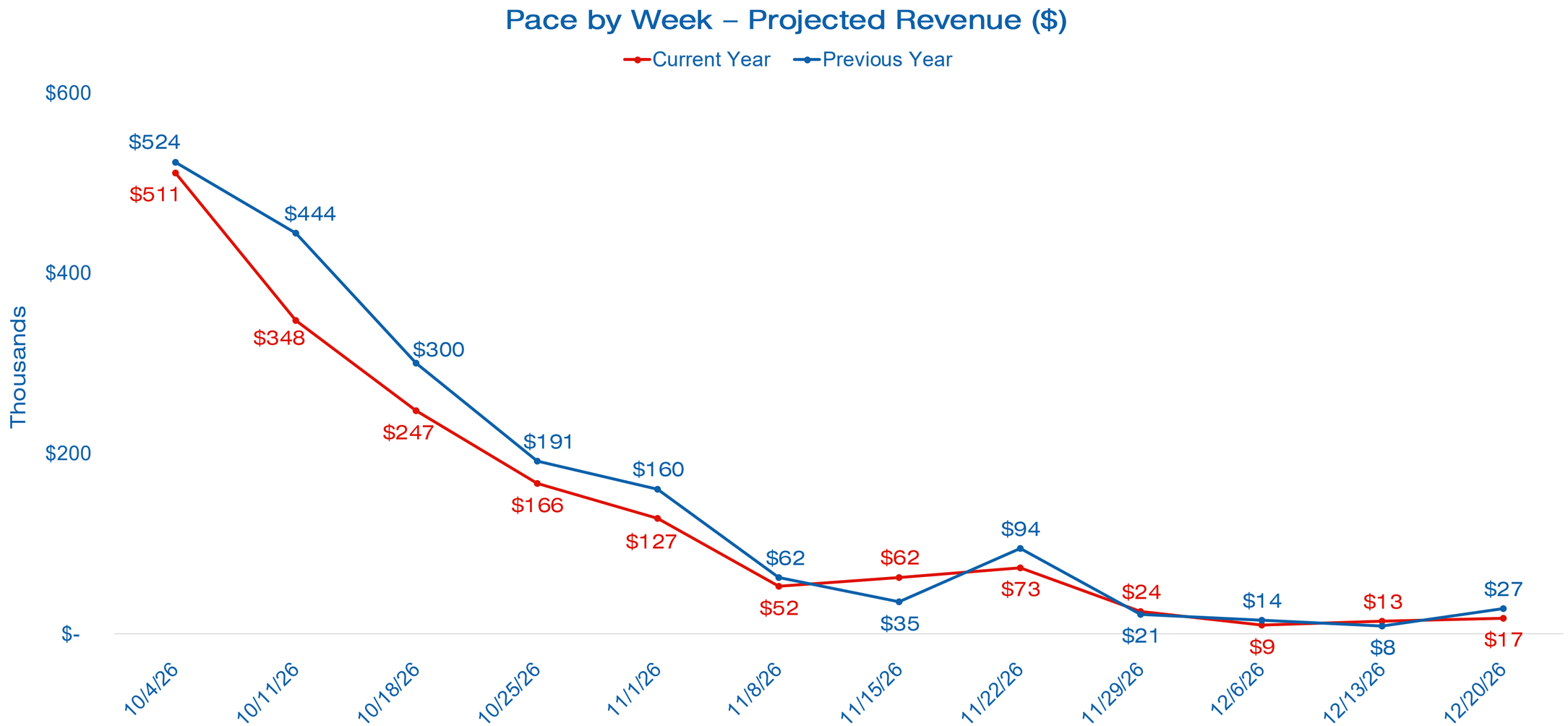
Source: Key Data (as of 10/5/2026, Sample = 12 hotels, 1,496 rooms)

DARE COUNTY HOTELS – AVERAGE DAILY RATE



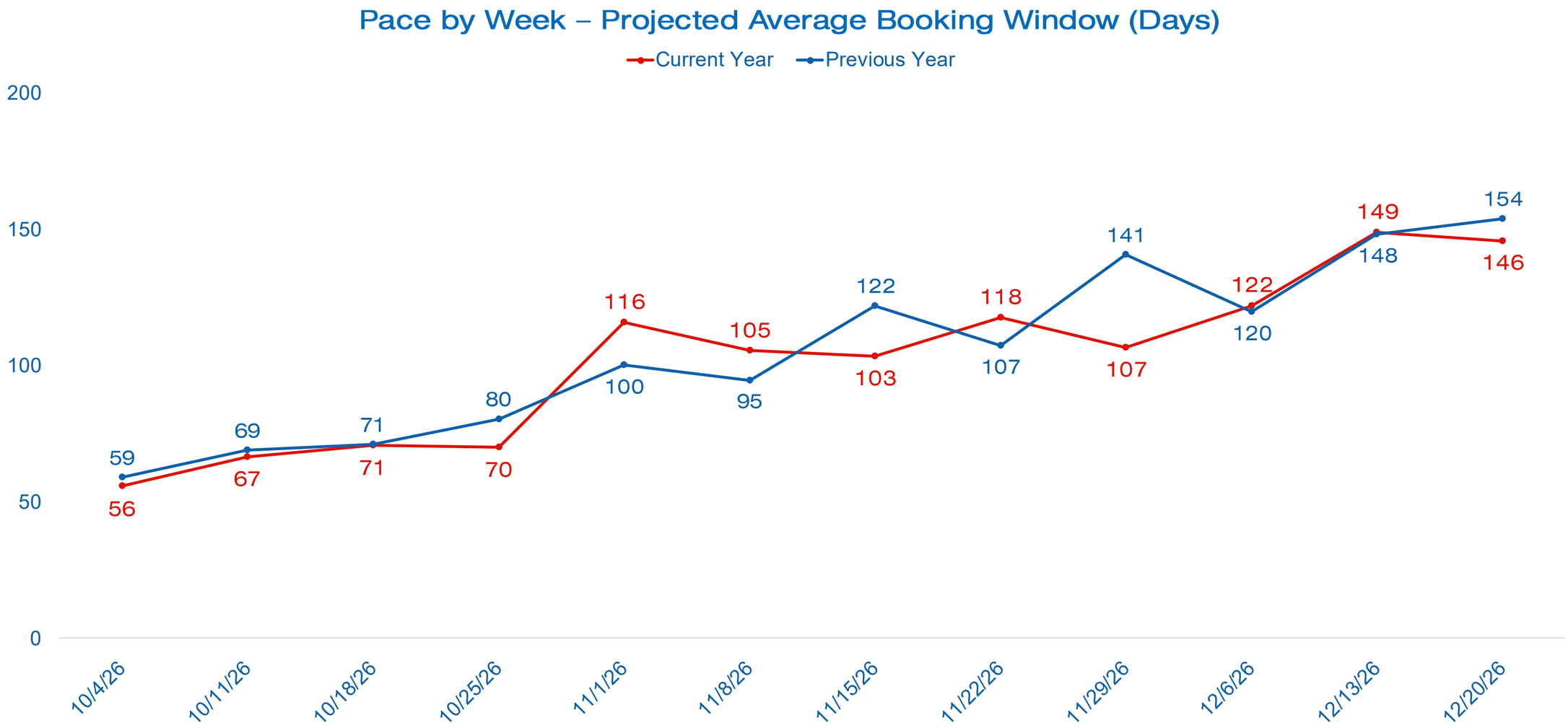
Source: Key Data (as of 10/5/2026, Sample = 12 hotels, 1,496 rooms)

DARE COUNTY HOTELS – REVENUE



Source: Key Data (as of 10/5/2026, Sample = 12 hotels, 1,496 rooms)

DARE COUNTY HOTELS – AVERAGE BOOKING WINDOW (DAYS)



Source: Key Data (as of 10/5/2026, Sample = 12 hotels, 1,496 rooms)

The Outer Banks Visitors Bureau

VISA DESTINATION INSIGHTS

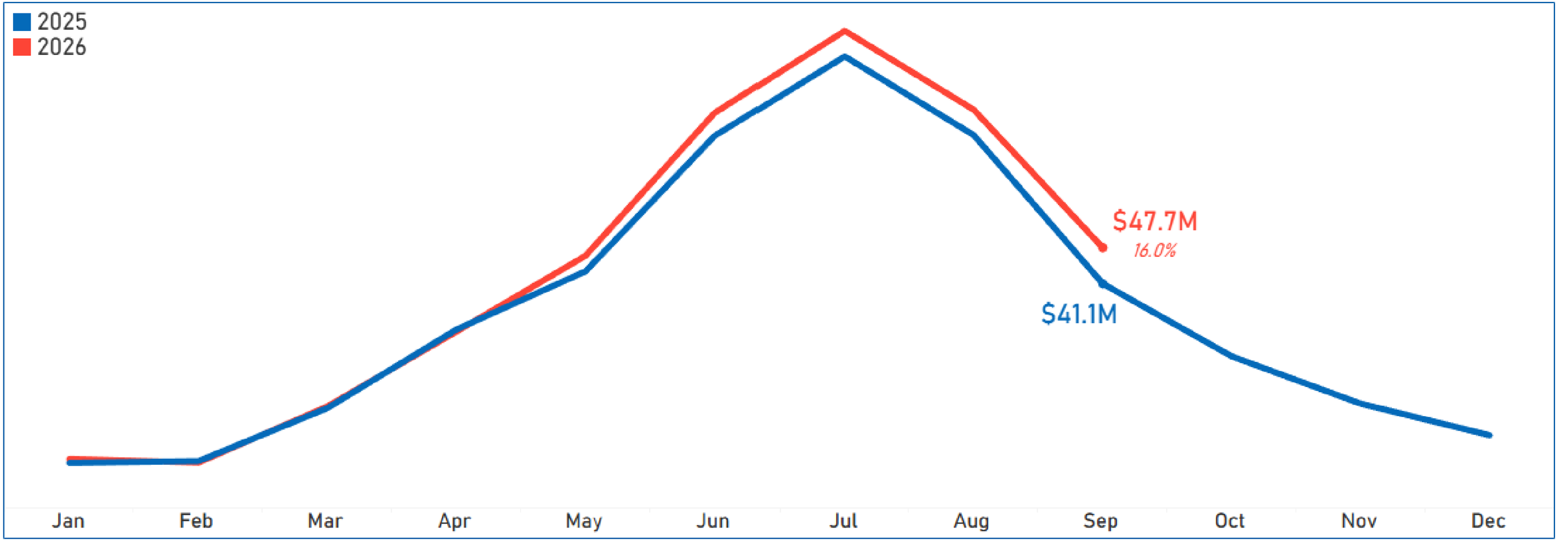


Outer Banks Monthly Visitor Spending
September 2026

*Source: Visa - please note these values only reflect in-market spending and does **not** include any online purchases or prepaid spending.*

	Domestic Visitor		International Visitor		Visitor Grand Total	
	Spend Amount	Card Count	Spend Amount	Card Count	Spend Amount	Card Count
Sep '26	$47,454,552	243,662	$235,453	1,249	$47,690,004	244,911
YOY	16.1%	16.3%	1.2%	15.4%	16.0%	16.2%

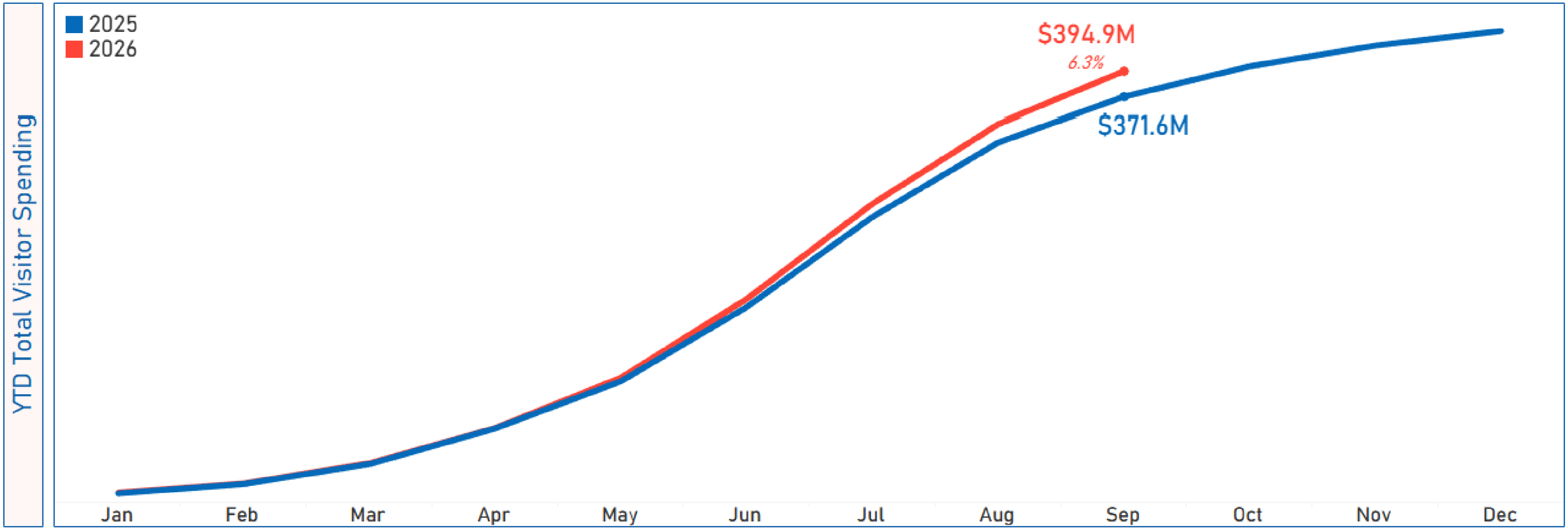
Total Monthly Visitor Spending



Outer Banks Monthly Visitor Spending
Calendar YTD Through September 2026

*Source: Visa - please note these values only reflect in-market spending and does **not** include any online purchases or prepaid spending.*

	Domestic Visitor		International Visitor		Visitor Grand Total	
	Spend Amount	Card Count	Spend Amount	Card Count	Spend Amount	Card Count
YTD '26	$392,235,370	1,936,537	$2,706,100	11,347	$394,941,470	1,947,884
YOY	6.3%	6.5%	-2.0%	-2.6%	6.3%	6.4%

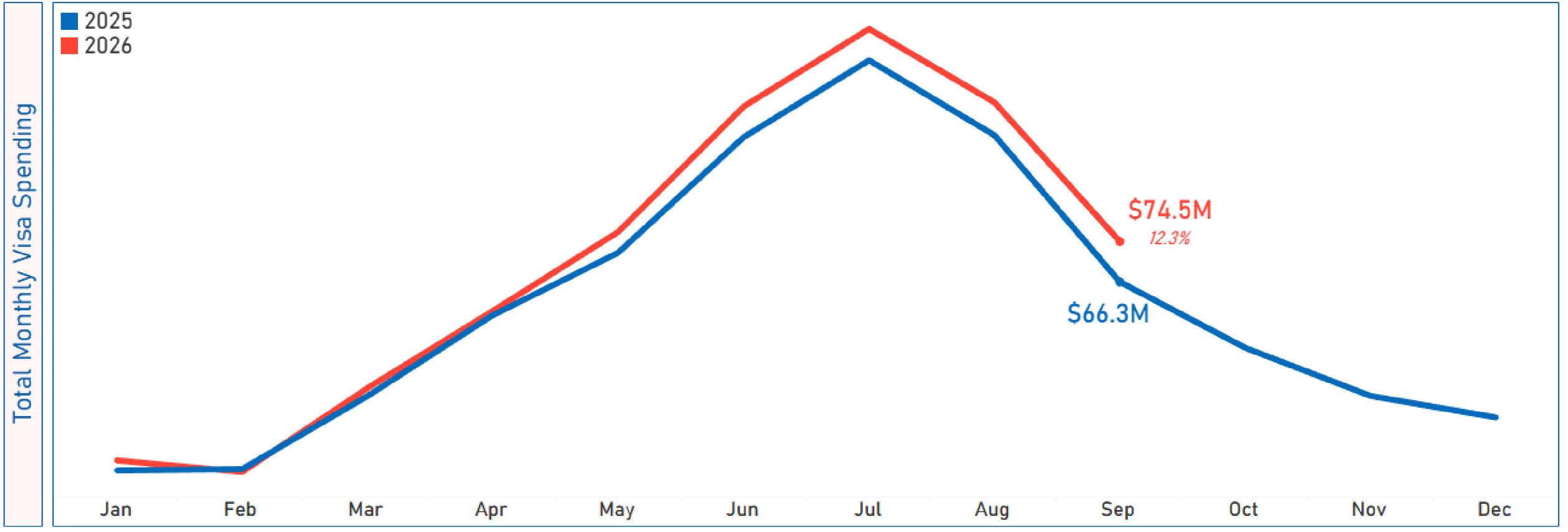


Outer Banks Monthly Total Visa Spending

September 2026

*Source: Visa - please note these values only reflect in-market spending and does **not** include any online purchases or prepaid spending.*

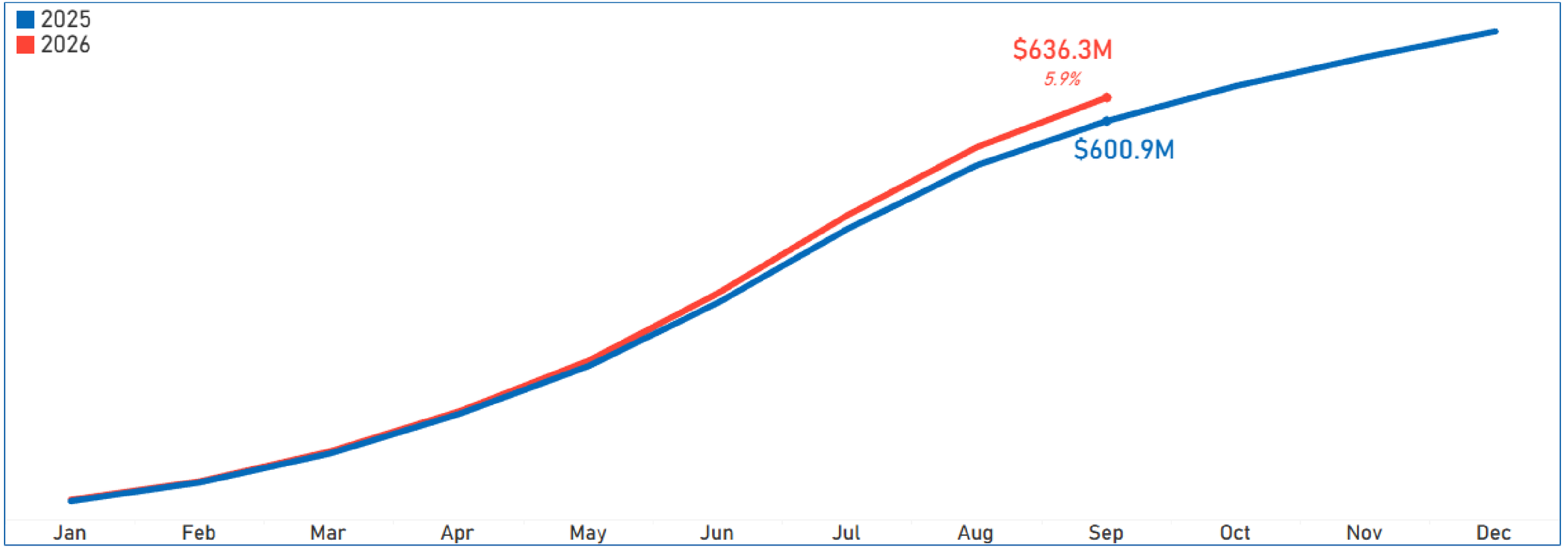
	Resident		Visitor		Grand Total	
	Spend Amount	Card Count	Spend Amount	Card Count	Spend Amount	Card Count
Sep '26	$26,817,560	52,584	$47,690,004	244,911	$74,507,564	297,495
YOY	6.4%	4.6%	16.0%	16.2%	12.3%	14.0%



Outer Banks Monthly Total Visa Spending
Calendar YTD Through September 2026

*Source: Visa - please note these values only reflect in-market spending and does **not** include any online purchases or prepaid spending.*

	Resident		Visitor		Grand Total	
	Spend Amount	Card Count	Spend Amount	Card Count	Spend Amount	Card Count
YTD '26	$241,408,365	460,678	$394,941,470	1,947,884	$636,349,836	2,408,562
YOY	5.3%	1.9%	6.3%	6.4%	5.9%	5.5%



Outer Banks Monthly Visitor Spending
Top Domestic Origin Markets - September 2026

*Source: Visa - please note these values only reflect in-market spending and does **not** include any online purchases or prepaid spending.*

	Spend Amount	YOY % Change	Card Count	YOY % Change
Washington-Arlington-Alexandria, DC-VA-MD-WV	$6,137,624	21.3%	27,287	19.9%
Virginia Beach-Norfolk-Newport News, VA-NC	$6,121,694	17.7%	37,179	13.8%
Richmond, VA	$4,297,073	24.1%	20,821	20.4%
Raleigh-Cary, NC	$1,547,338	21.3%	9,200	20.8%
Baltimore-Columbia-Towson, MD	$1,351,775	0.7%	6,061	-1.9%
Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	$1,299,024	5.2%	6,241	8.9%
New York-Newark-Jersey City, NY-NJ-PA	$1,054,127	41.0%	5,394	48.7%
Pittsburgh, PA	$981,103	3.7%	4,014	-1.7%
Charlotte-Concord-Gastonia, NC-SC	$828,198	34.5%	5,413	40.7%
Elizabeth City, NC	$788,712	11.5%	6,422	8.5%
Charlottesville, VA	$680,121	12.2%	3,000	10.5%
Lynchburg, VA	$484,248	26.2%	2,089	11.7%
Durham-Chapel Hill, NC	$483,853	27.7%	2,874	26.9%
Harrisburg-Carlisle, PA	$469,186	11.3%	1,850	2.5%
Winchester, VA-WV	$464,388	18.2%	1,772	13.0%

DIGITAL MARKETING METRICS



Outer Banks Visitors Bureau

FY26-27 Paid Media

September 2026 Dashboard

HOFFMAN YORK

campaign insights

This dashboard highlights Outer Banks Visitors Bureau's analytics, managed and audited by Hoffman York. It includes delivery highlights for paid media campaigns and outerbanks.org website activity.

- **Delivery trends:** Reviews FY26-27 year-to-date (FYTD) versus prior fiscal year-to-date totals.
- **Website analytics overview:** Reviews key KPIs/events tracked and website content viewed.
- **Campaign summary, search overview & email marketing performance overview:** Reviews topline delivery metrics for paid media campaigns and email marketing.

September 2026 Highlights

- Paid Media: As expected, Impressions and Video Views decreased YoY, -23% and -26%, respectively, primarily due to the absence of the Outside Custom Partnership, which has historically provided additional scale for new Outer Edge season launches.
  - Fall: As the campaign starts to conclude, Streaming TV (Hulu, NBC, HBO Max, Amazon Prime, Warner Bros Discovery, Paramount +, HGTV, Outside TV, ESPN), Streaming Video (YouTube), Native Video (Teads), Streaming Audio (iHeart), Local Radio (iHeart Total Traffic & Weather), and High Impact (Perion & Verve) delivered in full by the end of the month.
    - Native Display (Google Guidebook + Teads) and YouTube Shorts boosts will remain live through 10/31.
    - *Note: Delivery from the Local Radio (iHeart Total Traffic & Weather Network) will be included on October's dashboard due to delays in reporting. Overall impressions will increase once added.*
  - Continuity:
    - Monthly Native Display supported Beach Budget, Seafood Festival, Fall Getaway, Fall Escape and Volunteer Week. Volunteer Week generated a fiscal year-to-date high CTR of 0.72%. Additionally, all September creatives rank within the top five highest CTRs delivered this fiscal year! Those in the Site Retargeting audience who clicked the Volunteer Week creative spent the most time on the site, averaging 1 minute 44 seconds.
- Website: While sessions remained flat YoY (-1.2%), Page Views increased 9%, suggesting visitors may have navigated to more pages across the site. Page views driven from Paid Media saw the largest volume increase at +46.6K views, or +12%.
  - The /listing/ page path and the listing_details_reached key event saw the largest volume increases at +63K YoY, or +147%. Traffic primarily came from Paid Social directing to the OBX Ghost Tours listing.
  - September generated 2.9K travel guide requests on the site and 1.7K PDF travel guide requests.
- Email: 93K emails were sent across consumer marketing contact sublists and various workflows, achieving an overall 17% open rate, 13% CTR (opens), and 0.77% bounce rate.
  - The September monthly OBX email titled "Fall Fun Loading on the OBX" generated a 16% open rate and 10% CTR (opens). The Explore CTA button under Travel Specials generated the majority of clicks (21%), followed by the Outer Banks Seafood Festival Event (14%).
    - *Note: The Foodie workflow audience was intentionally excluded from this send to minimize message frequency and ensure they receive the Foodie Newsletter.*
  - A Foodie Newsletter titled "Treat Your Tastebuds to the OBX" was sent out to the Foodie workflow and generated a 25% open rate and 22% CTR (opens). The Plan Your Trip CTA button achieved the most clicks (21%), followed by the Dig In CTA link driving to locally sourced seafood restaurants (19%).
  - Among workflows, Foodie had the highest send volume (282), with a 34% open rate and 41% CTR (opens).

Dashboard was updated on 10/6/26. Data is reviewed and validated through - Media, Email, and Website: 9/30/26.

FYTD = Fiscal Year Total To-Date (includes all data from July 2026 through the listed 'reviewed and validated date').
Monthly Delivered v. Previous Year = Month Of v. Same Month Previous Year i.e. August 2026 vs. August 2025

delivery trends

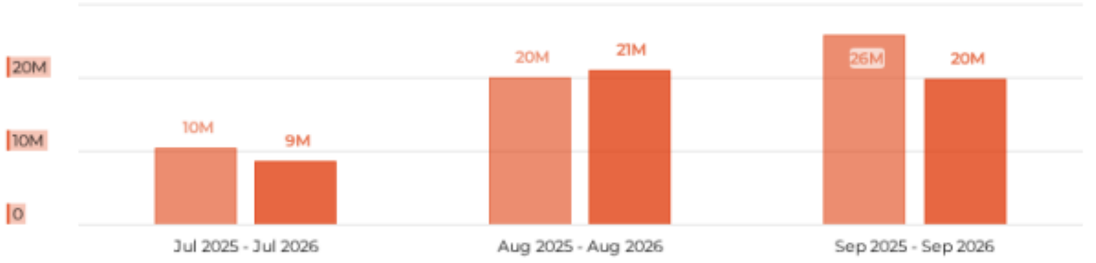
FYTD: Impressions

49,393,523

-12.30% (-6,925,818)

Monthly Impressions Delivered vs. Previous Year

Impressions



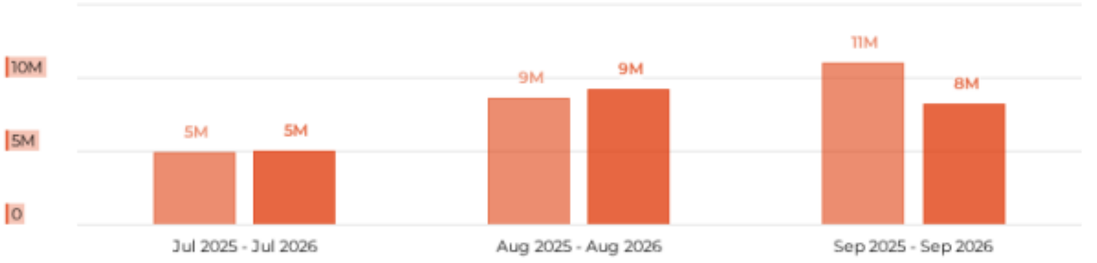
FYTD: Video Views

22,415,426

-8.78% (-2,157,885)

Monthly Video Views Delivered vs. Previous Year

Video Views



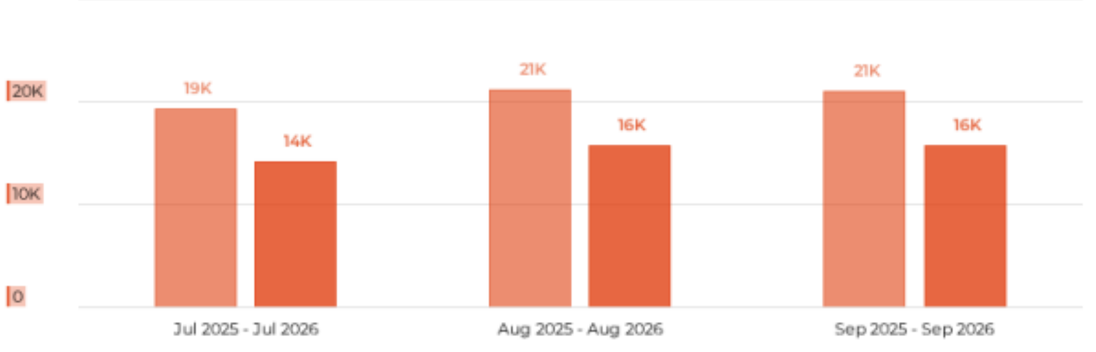
FYTD: Email Opens

45,599

-25.90% (-15,941)

Monthly Email Opens v. Previous Year

Email Opens



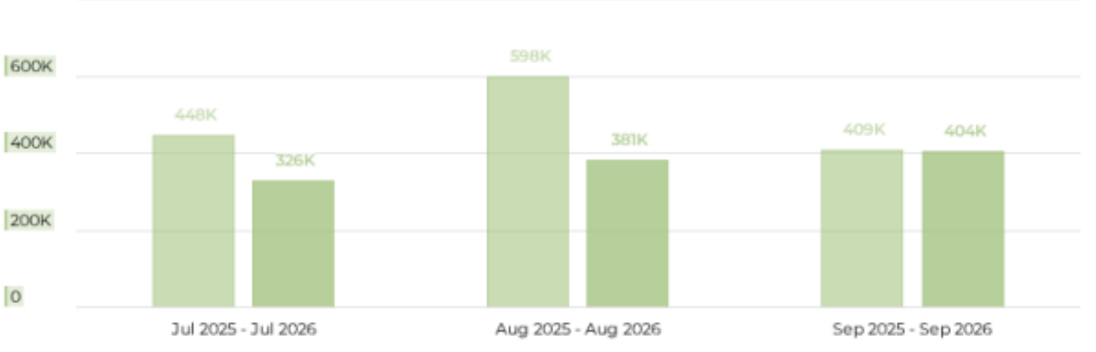
FYTD: Website Sessions

1,111,348

-23.62% (-343,640)

Monthly Website Sessions v. Previous Year

Sessions



Executive Summary

	Drive Awareness *KPI: Impressions*	Drive Intent *KPI: Website Sessions Referred by Social Sources*	ENGAGEMENTS *KPI: Likes, Comments, Shares, Saves/Favorites, Video Completions, Link Clicks, Media Clicks*	CONVERSIONS *KPI: Mini-Guide Requests, Physical Guide Requests, Guide PDF Downloads, eNews Sign-Ups*
Sep 2026	4,497,899	70,554	378,773	2,699
Monthly Goal	*3.9MM - 5.4MM*	*37.1K - 50.9K*	*284.0K - 347.0K*	*1.9K - 2.5K*
FYTD	12,804,662	163,116	713,241	8,887
FYTD Goal	*10.4MM - 14.3MM*	*93.0K - 127.7K*	*685.5K - 837.4K*	*4.7K - 6.3K*

Key Messaging:

- Soundside Boardwalk
- Ghost Tours

Performance Overview:

- All KPIs exceeded monthly projections with intent, engagement, and conversions exceeding stretch goals.
- The Ghost Tours post on Meta referred majority of website visits this month as the audience was excited to learn more.
- September also saw the first post from the newly introduced Local Voices series with a spotlight on bioluminescence on the OBX.
- Pinterest continues to perform well, driving a high volume of website traffic from an “OBX Bucket List” pin, encouraging visitors to deepen their experience with the destination.

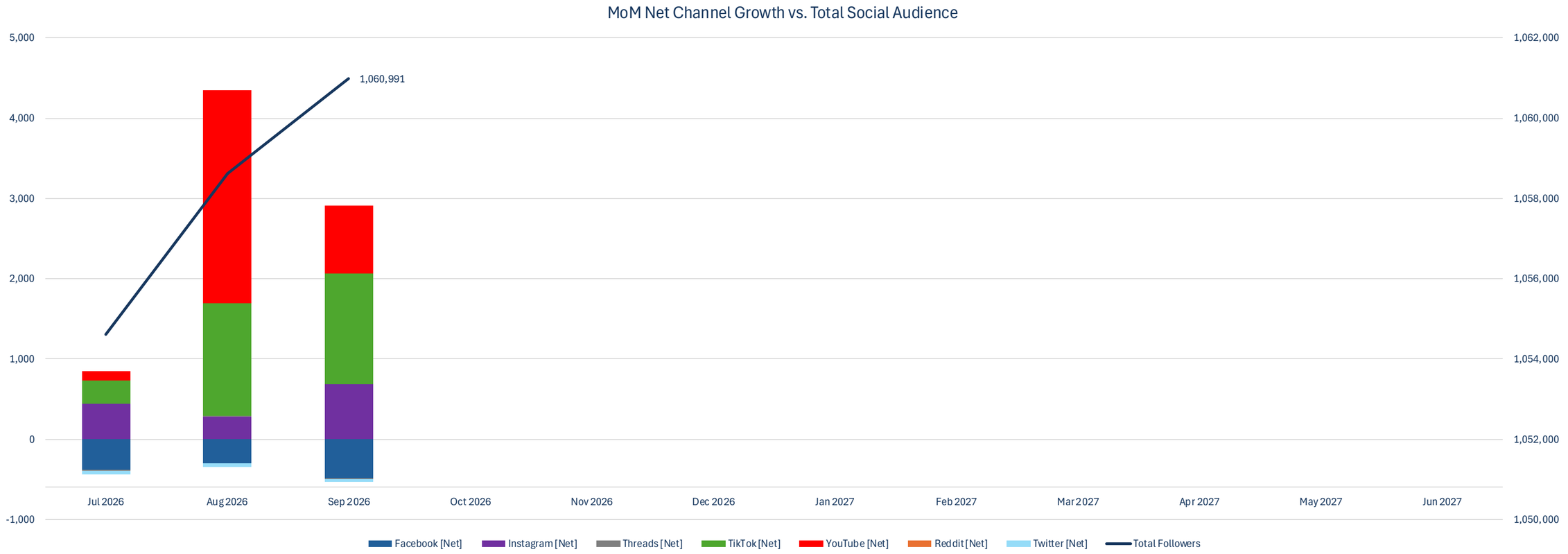
Next Steps & Recommendations:

- Ghost stories and lore continue to perform efficiently, more content will be included in the October calendar to align with the spooky season – including content from the Local Voices program.
- Fall content will also highlight the benefits of shoulder season visitation: tranquility, slow travel, fewer crowds, and a lot to do and enjoy.
- Oyster season content for the upcoming season will also include creative from a Local Voices creator.

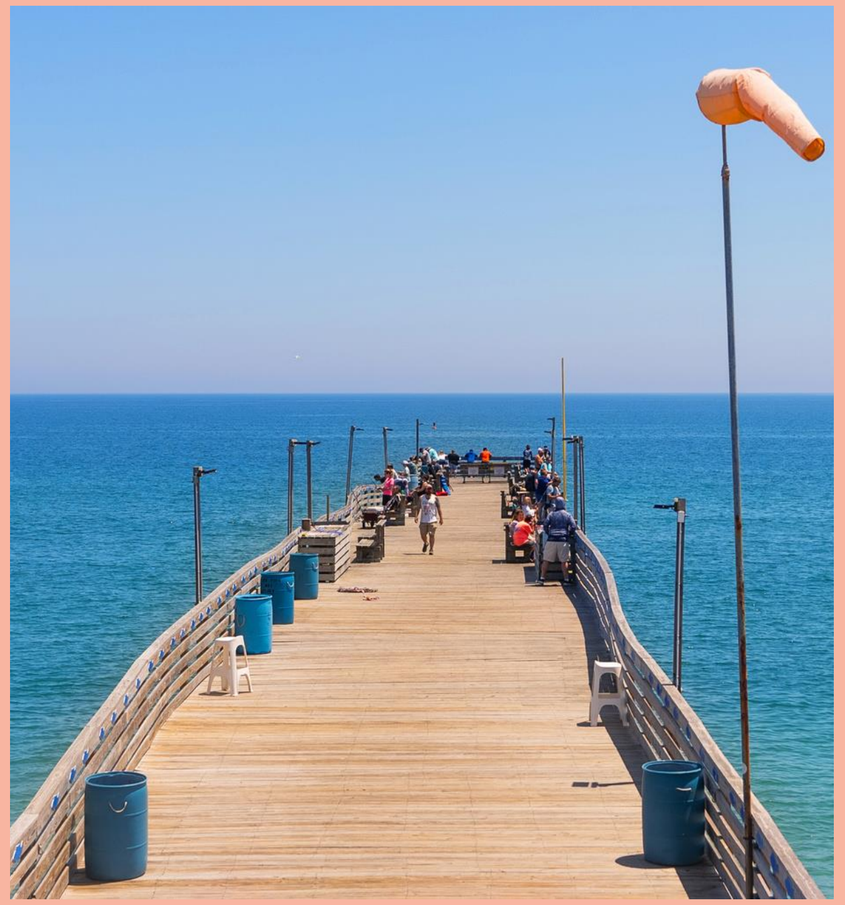
Engage – Community Growth

Highlights:

- Facebook continued to experience attrition – typical for pages across industries – while TikTok and YouTube experienced the most net growth.



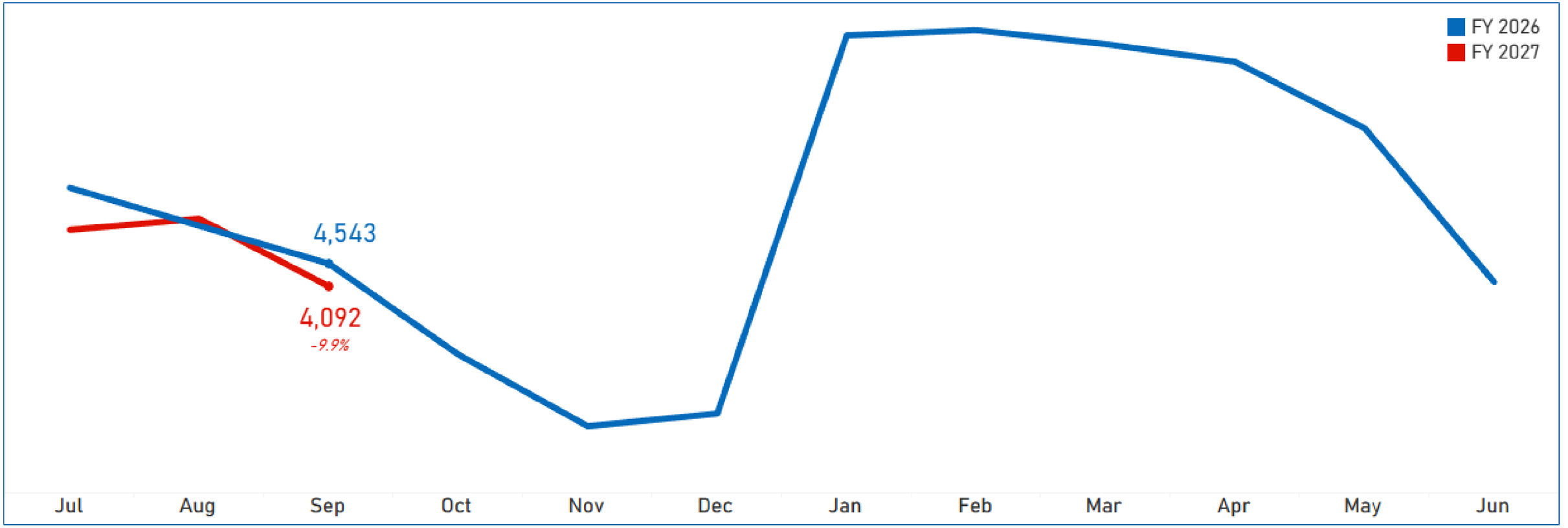
BUREAU FULFILLMENT



Outer Banks Visitors Bureau Monthly Fulfillment
September 2026

	Type of Request					Total
	Calls	Print	Online	eGuide	Mail	
Sep '26	29	0	2,578	1,484	1	4,092
YOY	26.1%	-100.0%	-3.3%	-19.2%	0.0%	-9.9%

Total Fulfillment



TRAVELER SENTIMENT



AMERICAN TRAVEL SENTIMENT STUDY (WAVE 111)

*Survey fielded September 1-4, 2026; US National Sample of 1,000 adults 18+

American Travel Sentiment Wave 111 Highlights

Key Findings:

1. **Impact of Gas Prices on Travel Plans Down Compared to April 2026**
   20% of travelers say that gas prices are not impacting their travel plans, up 3.1 points compared to April 2026. Fewer travelers are choosing destinations closer to home (37%, down 3.6 points) or reducing other travel spending. The largest decline in planned spending reductions is among those who say they would reduce the amount they spend on entertainment and recreation (26%, down 8.3 points).

2. **Travel Remains a Priority Despite Travel Costs**
   Although 75% of travelers agree that travel is becoming too expensive, the majority (55%) are willing to reduce spending in other areas of their life to prioritize travel. Eight in ten (81%) travelers agree that vacations are one of the things they most look forward to each year, up 5.8 points compared to September 2025. 74% of travelers agree that they value making experiences over acquiring more material belongings.



Source: Longwoods International ATS Wave 111

Longwoods INTERNATIONAL | miles PARTNERSHIP

Source: Longwoods International

AMERICAN TRAVEL SENTIMENT STUDY (WAVE 111)

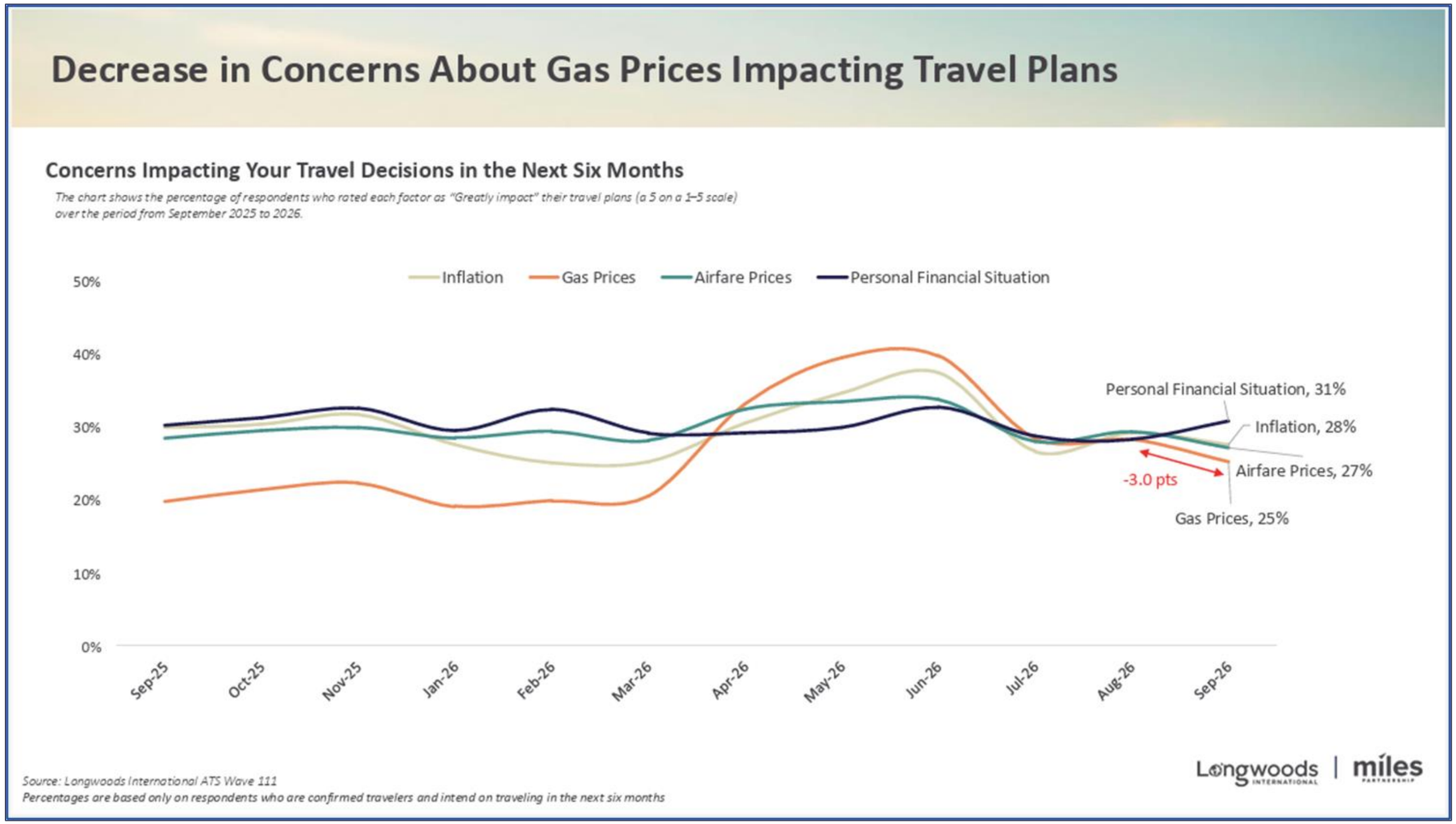
*Survey fielded September 1-4, 2026; US National Sample of 1,000 adults 18+



Source: Longwoods International

AMERICAN TRAVEL SENTIMENT STUDY (WAVE 111)

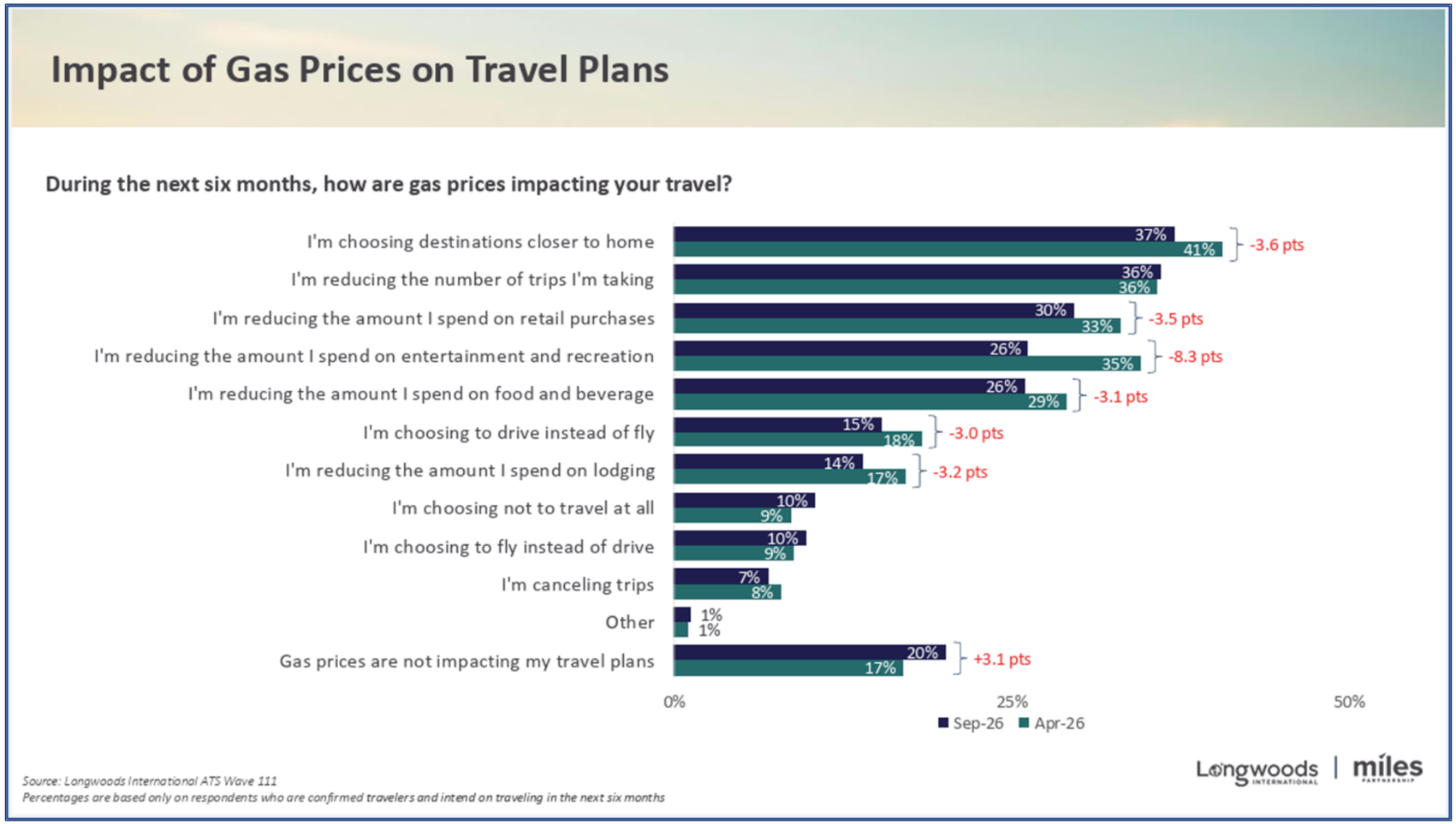
*Survey fielded September 1-4, 2026; US National Sample of 1,000 adults 18+



Source: Longwoods International

AMERICAN TRAVEL SENTIMENT STUDY (WAVE 111)

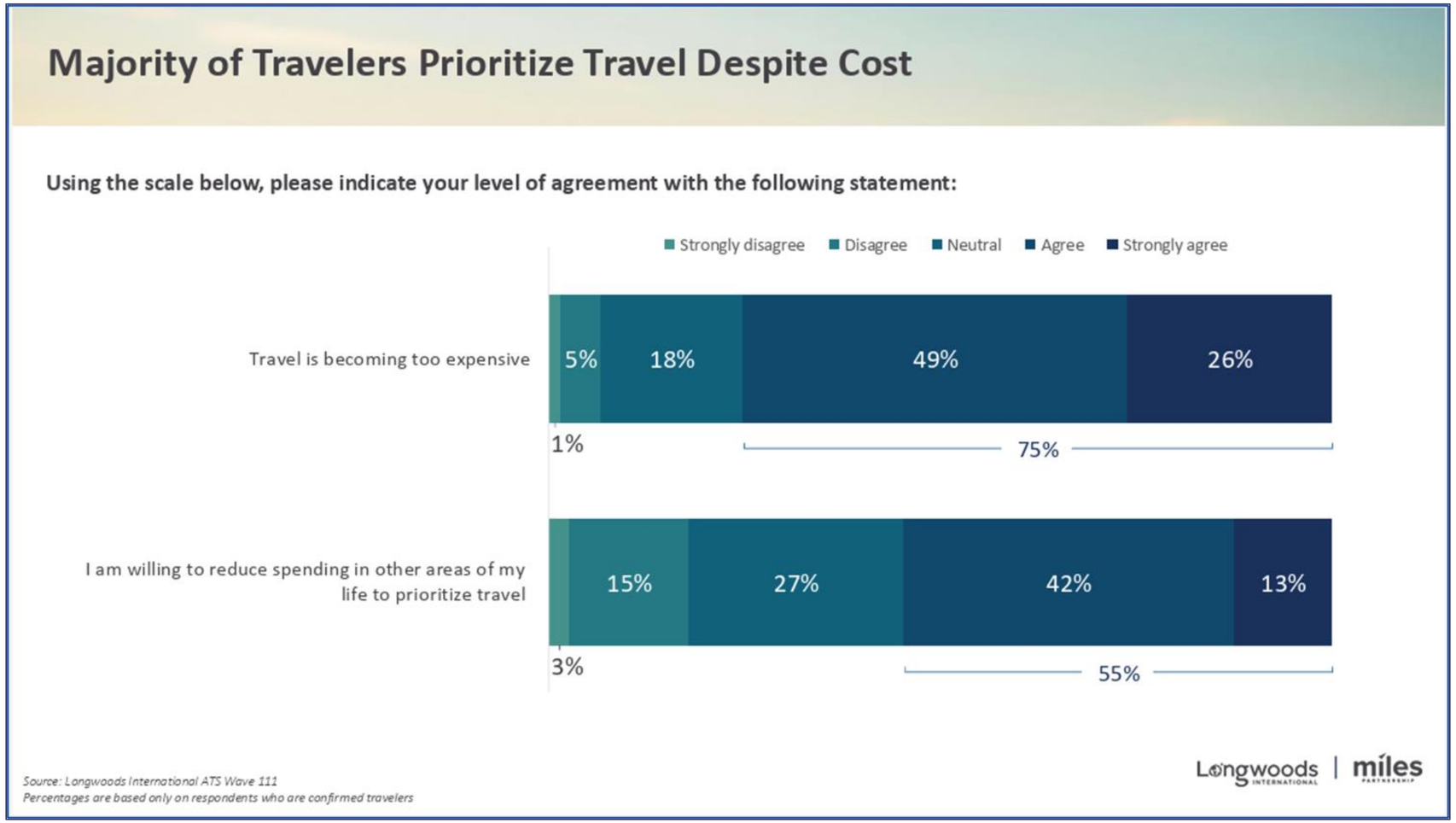
*Survey fielded September 1-4, 2026; US National Sample of 1,000 adults 18+



Source: Longwoods International

AMERICAN TRAVEL SENTIMENT STUDY (WAVE 111)

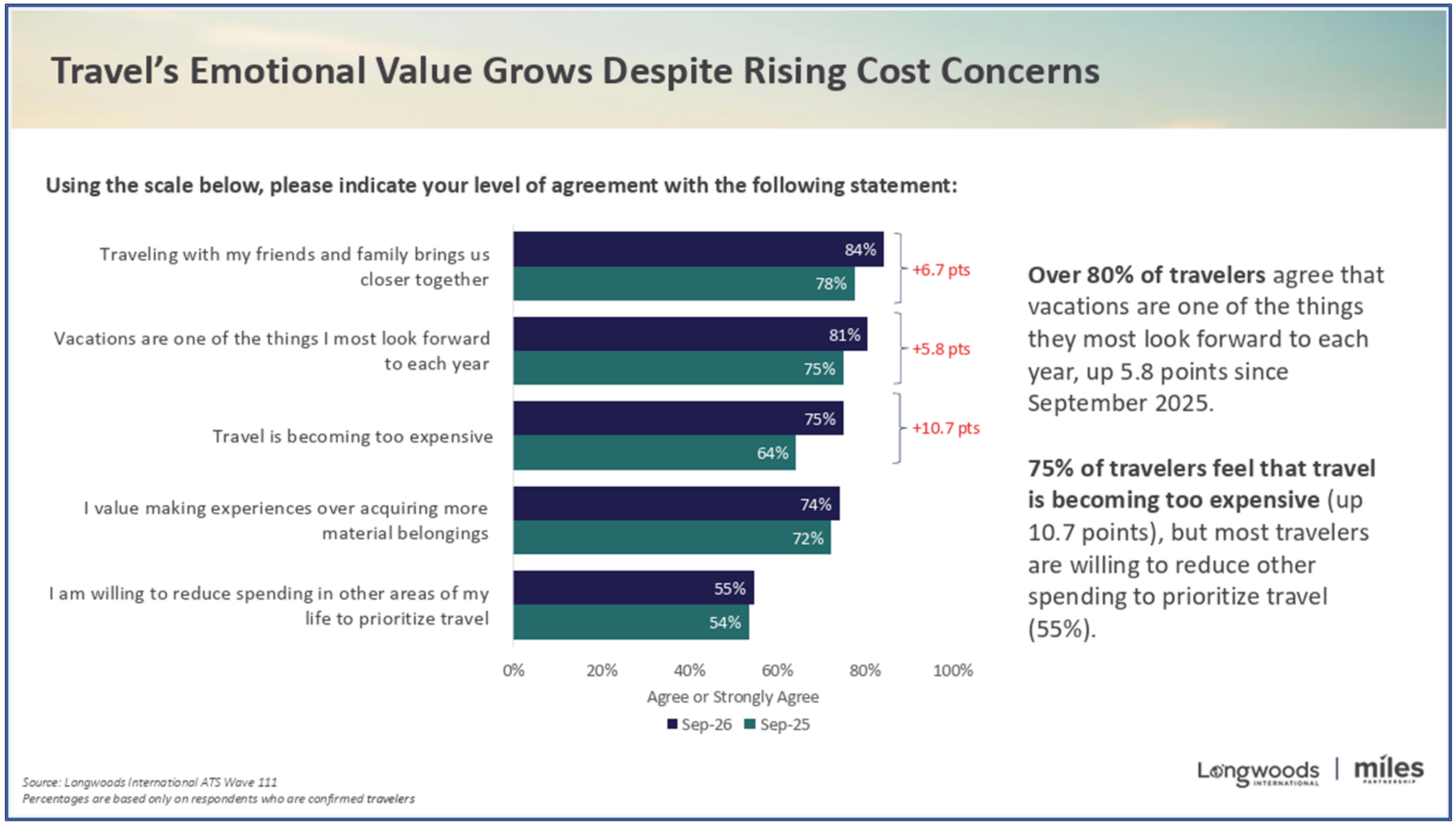
*Survey fielded September 1-4, 2026; US National Sample of 1,000 adults 18+



Source: Longwoods International

AMERICAN TRAVEL SENTIMENT STUDY (WAVE 111)

*Survey fielded September 1-4, 2026; US National Sample of 1,000 adults 18+



Source: Longwoods International

AMERICAN TRAVEL SENTIMENT STUDY (WAVE 111)

*Survey fielded September 1-4, 2026; US National Sample of 1,000 adults 18+

American Travel Sentiment Methodology

The American National Travel Sentiment Study is the most comprehensive and longest-running survey of its kind, offering valuable insights into the factors influencing American travel behaviors.

Key Details:

- Survey Date: September 1 – 4, 2026
- Sample Size: 1,000 U.S. adults (18+)
- Margin of Error: ±3%
- Representative of U.S. population demographics (age, gender, region)

Travelers are only respondents that have taken a trip in the last 3 years and intend to take a trip in the next 2 years.

Conducted with support from Miles Partnership, this study remains a vital tool for understanding the dynamic landscape of American travel.



Longwoods INTERNATIONAL | miles PARTNERSHIP

Source: Longwoods International