


MONTHLY RESEARCH UPDATE

April 2026 Review

 (877) 629-4386

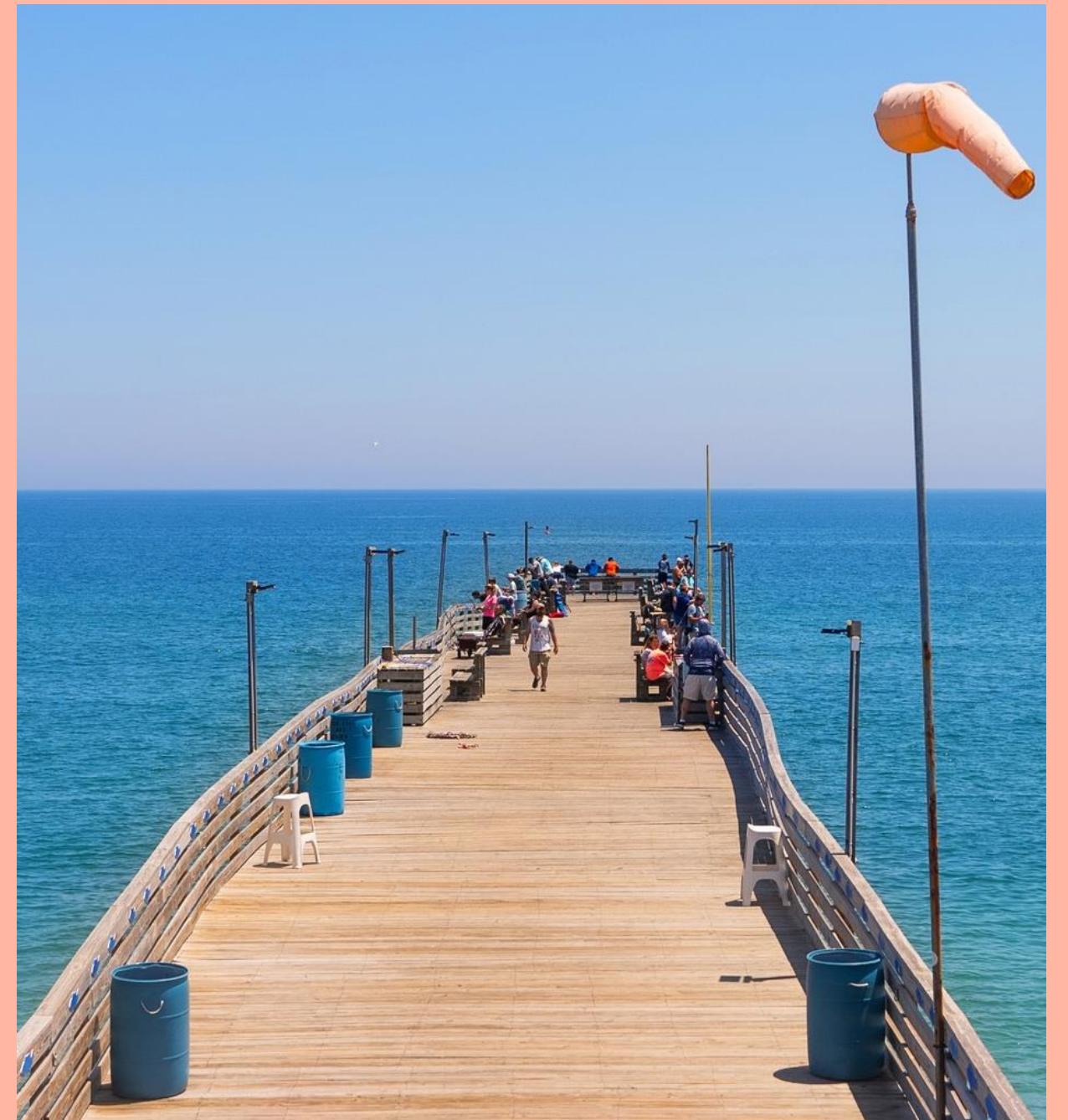
 One Visitors Center Circle, Manteo, NC 27954

 www.outerbanks.org

EXECUTIVE SUMMARY

- In April, Demand among Dare County's short-term lodging properties continued to trail below last year's trend, as Guest Nights (Demand) decreased by 18.9% Year-over-Year (YoY), while Owner Nights & Holds dropped by 9.3% YoY. As a result, Adjusted Paid Occupancy for the month fell by 11.7% compared to last April. Adjusted Paid Occupancy came to 37.5% throughout the county for the month.
 - Roanoke Island was the only region within Dare County to see Adjusted Paid Occupancy increase, albeit slightly, compared to last year. Rentals on Hatteras Island saw the highest average Adjusted Paid Occupancy at 41.3%, followed closely by Roanoke Island at 41.2%, and Northern Beaches at 35.4%.
 - Throughout Dare County, Average Daily Rate (ADR) increased by 3.0% YoY to \$220. Northern Beaches and Roanoke Island both saw ADR rise compared to last year, to \$254 and \$146 respectively, while Hatteras Island was flat at \$171 for the month.
- Guest Demand among Dare County's hotels dipped in April, decreasing by 3.6% YoY, pulling Paid Occupancy down with it. Hotels averaged 75.5% Occupancy for the month, a 3.6% decline from last year.
 - Conversely, hotel ADR rose moderately, gaining 2.4% YoY to average \$164 for the month. The increase in ADR slowed the rate of decline in Revenue, which fell by just 1.2% YoY, to \$2.75 million in April.
- In-market visitor spending on Visa cards totaled \$32.3 million in April 2026, a slight 1.2% decrease compared to the same month last year.
 - Visitor spending was a mix of increases and decreases across major domestic markets. Spending from the largest market, the Virginia Beach MSA, was basically flat in April, down just 0.5% YoY, while the Washington DC-VA-MD-WV MSA fell significantly by 12.8% YoY. Conversely, spending from the Richmond MSA increased by 2.3% YoY.
 - Overall, domestic visitor spending fell 1.1% YoY in April, while international visitor spending decreased 8.4% YoY for the month.

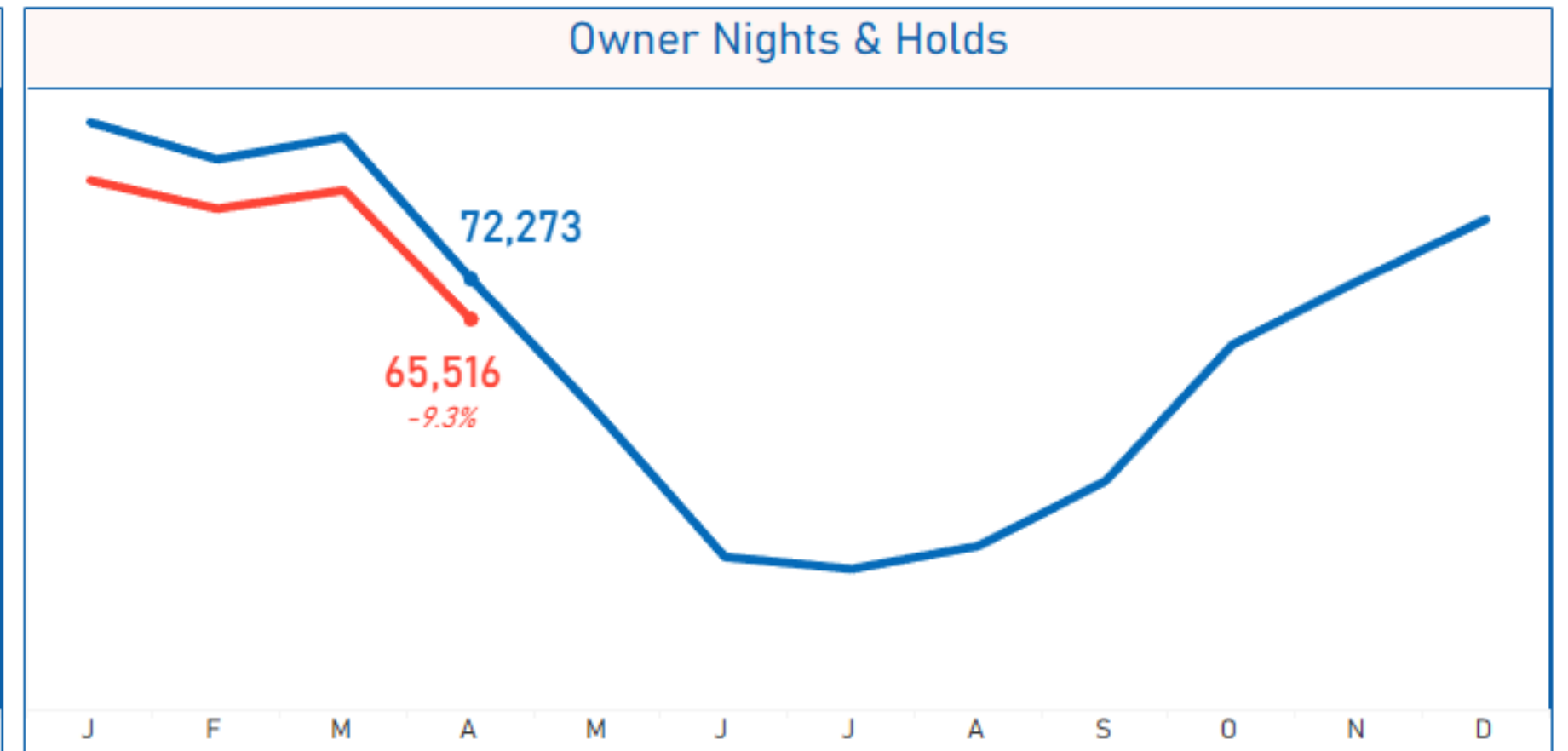
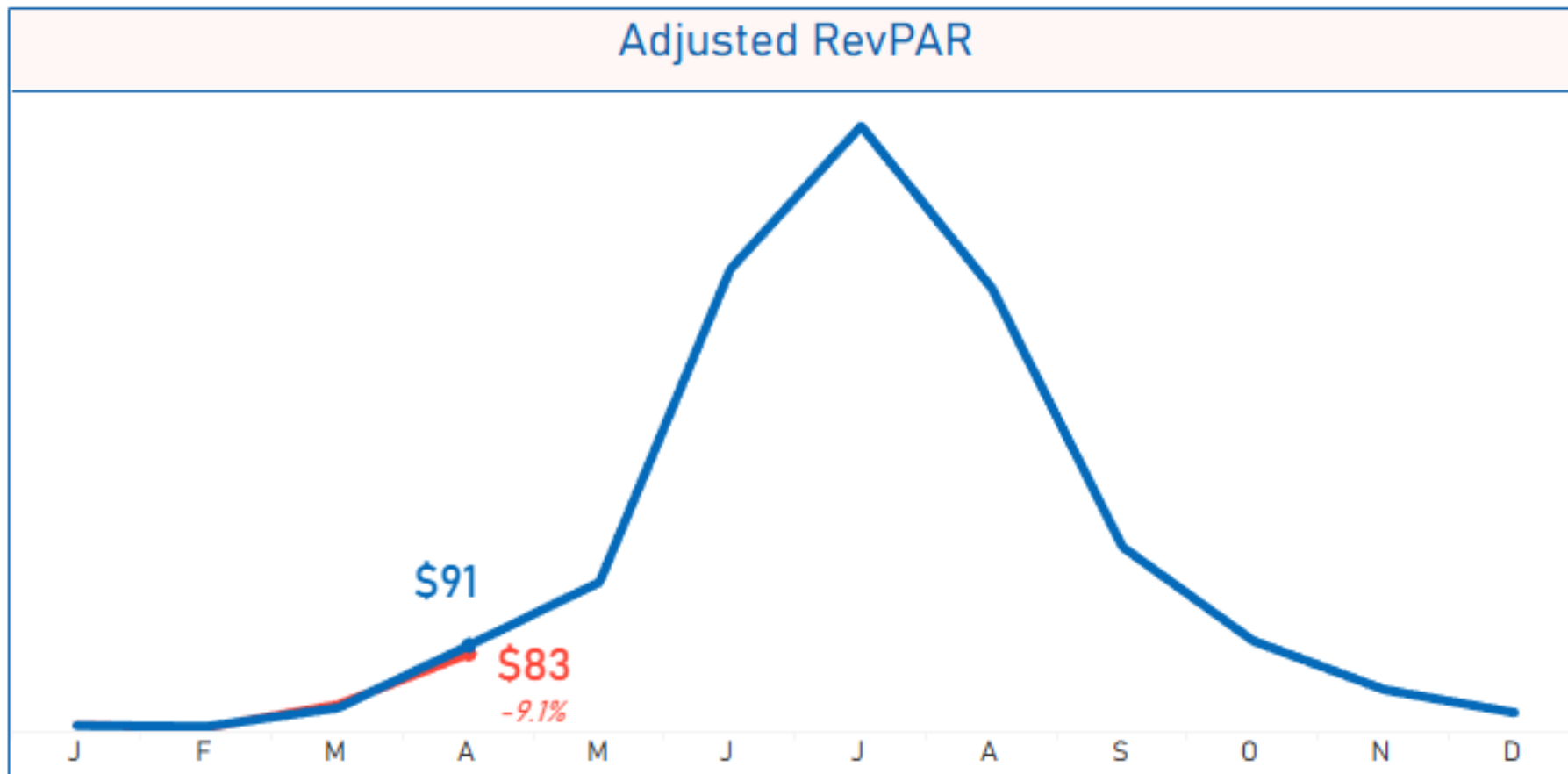
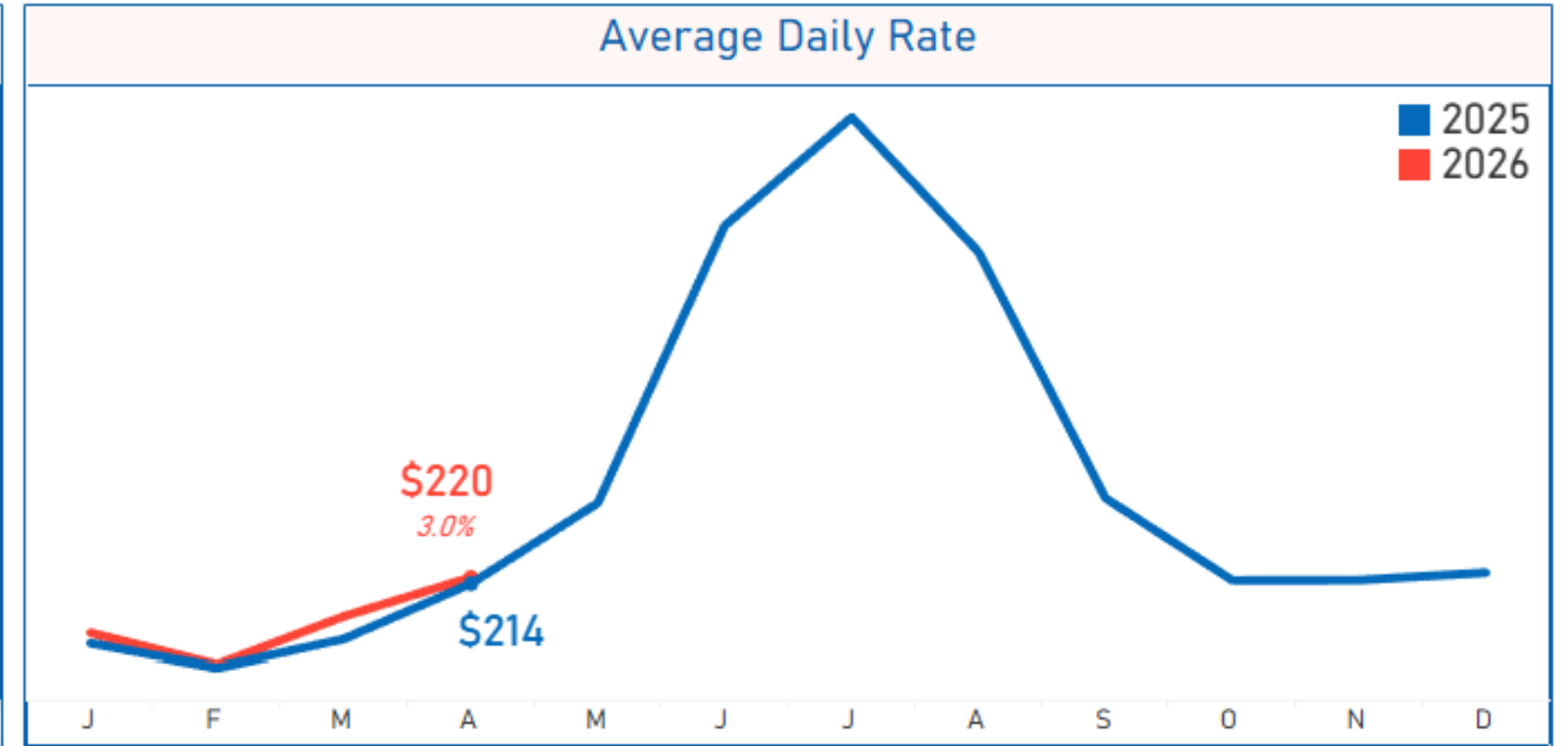
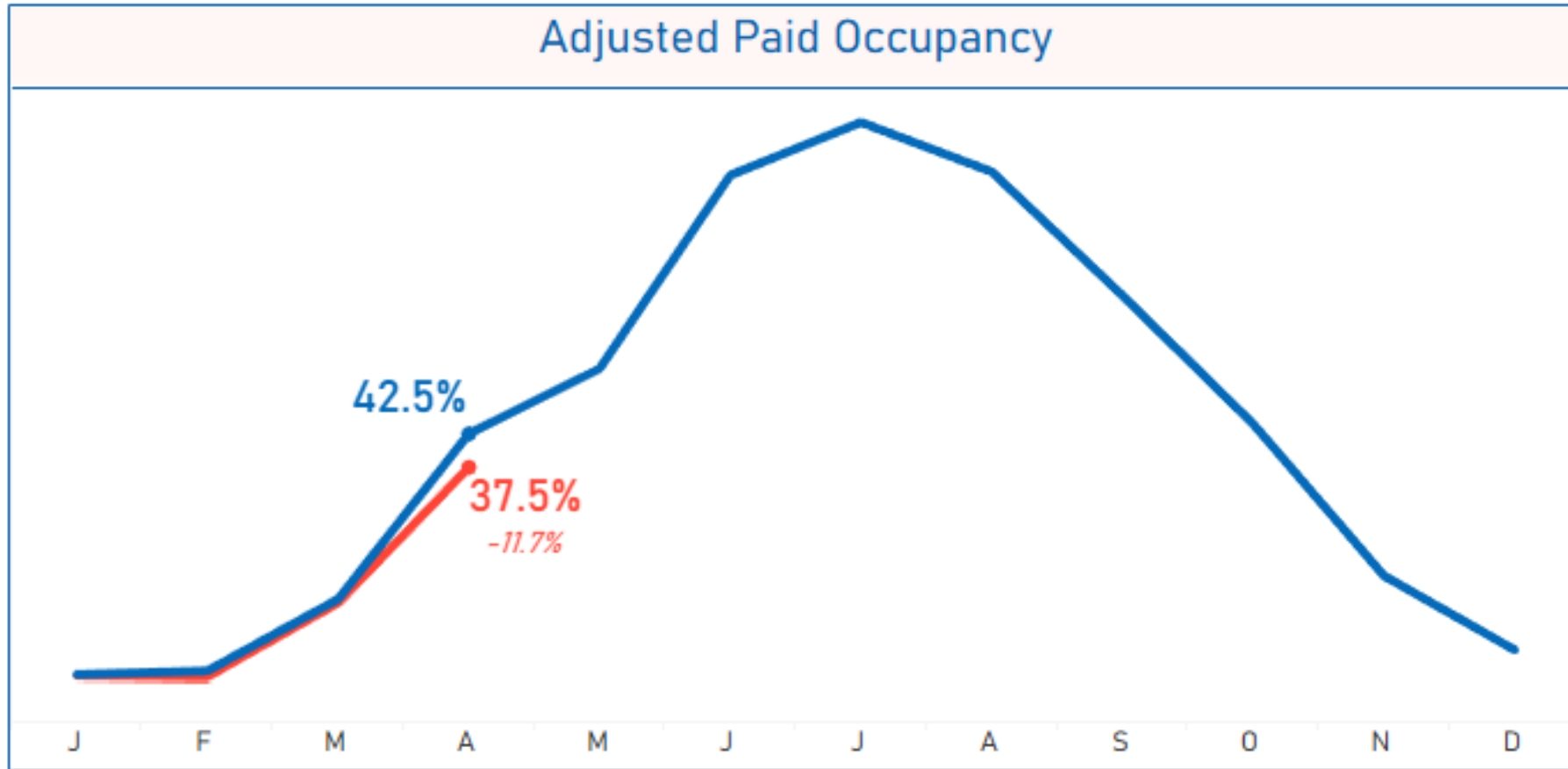
HISTORICAL SHORT-TERM RENTAL DATA



Dare County Monthly Short-Term Rental Performance

April 2026

Source: KeyData



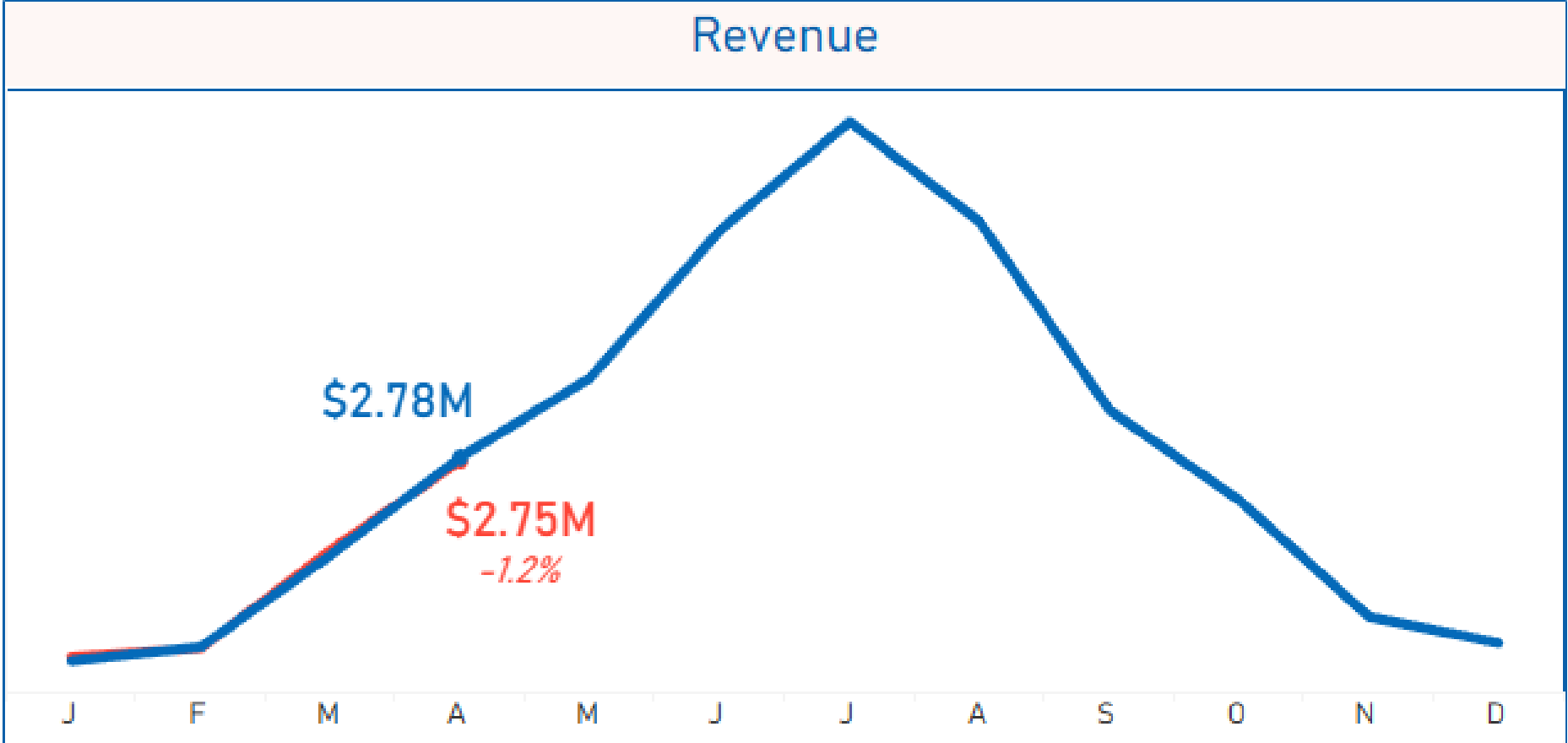
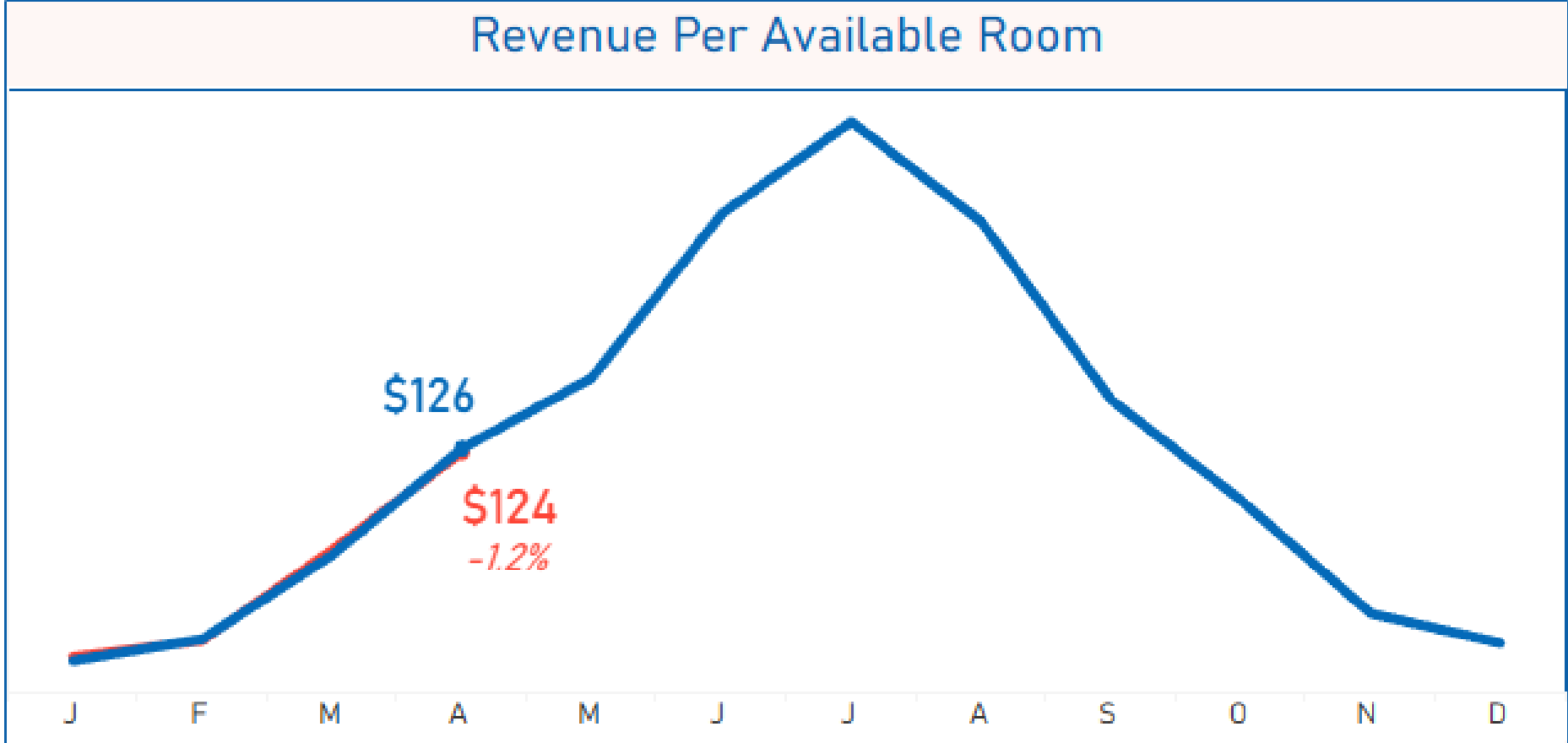
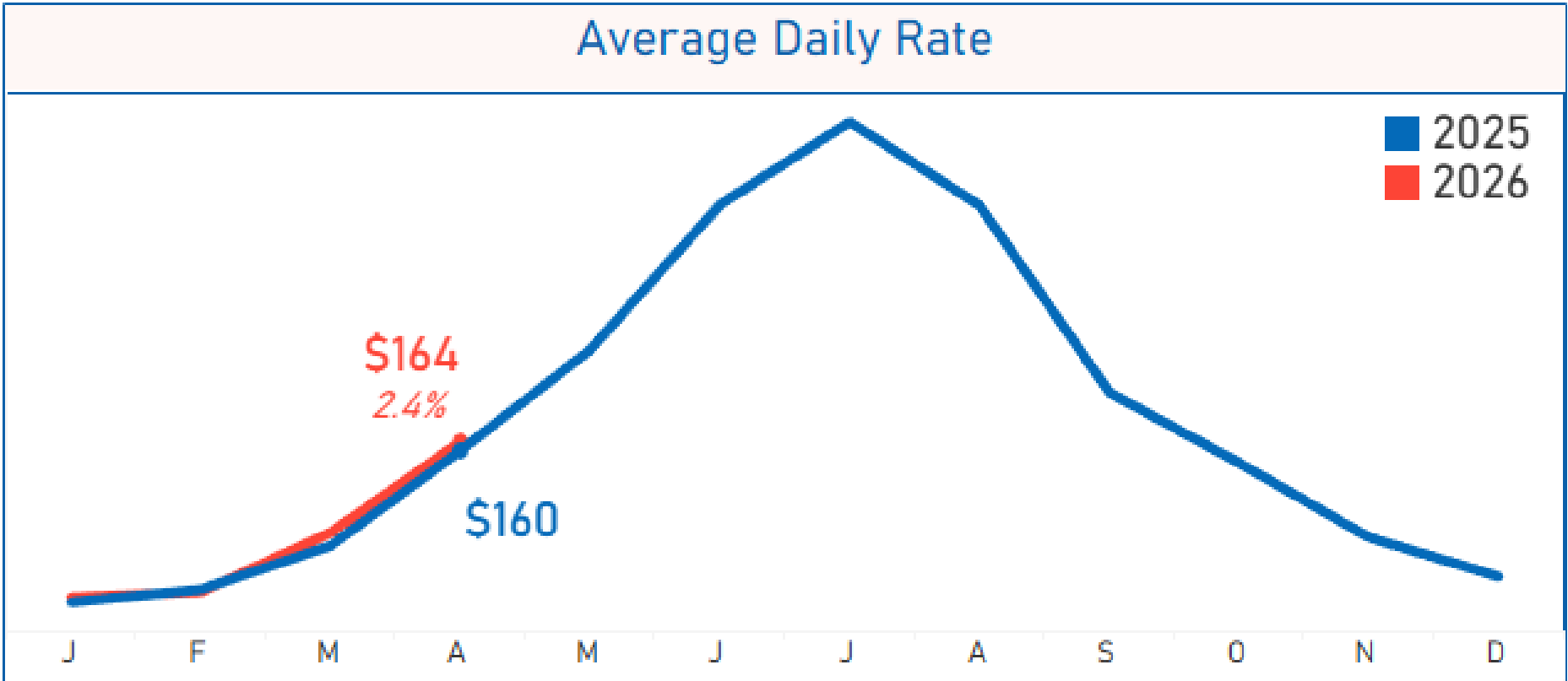
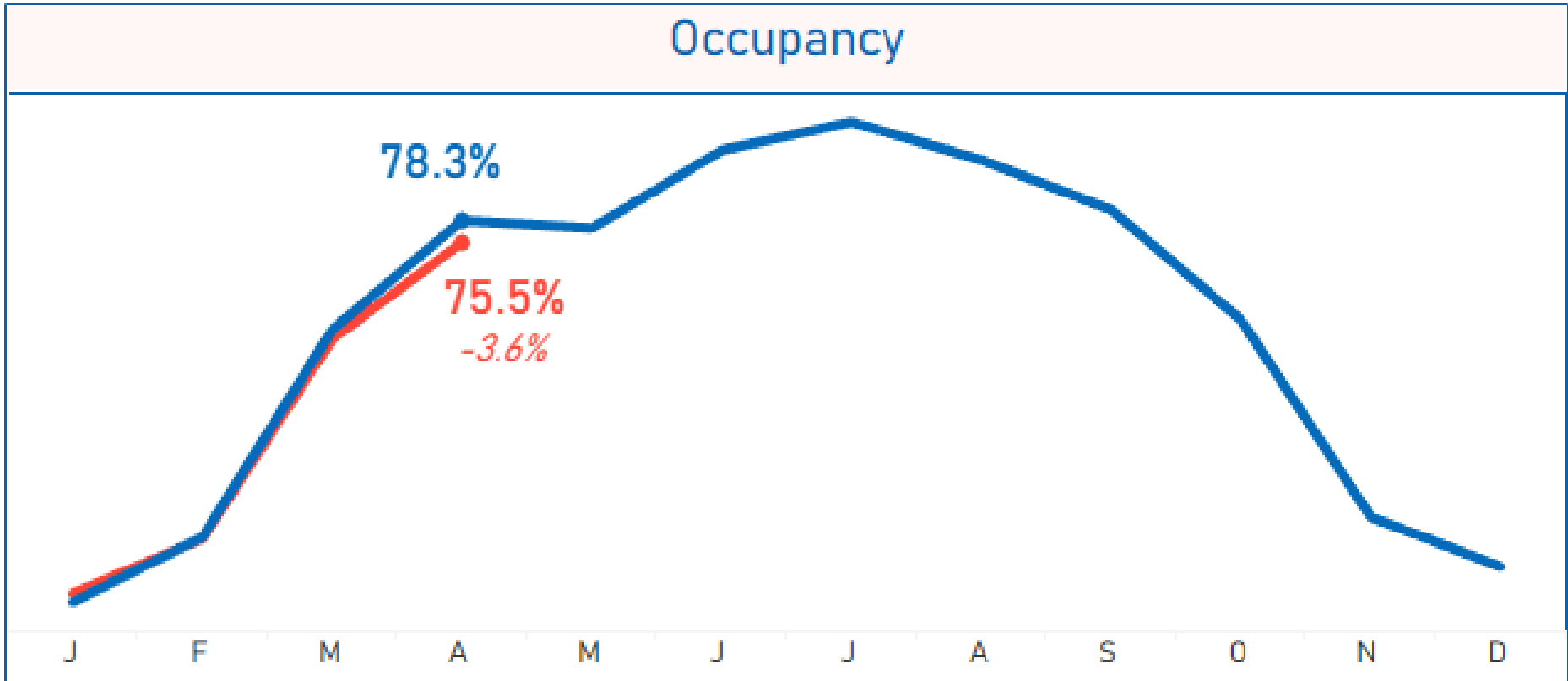
HISTORICAL HOTEL DATA



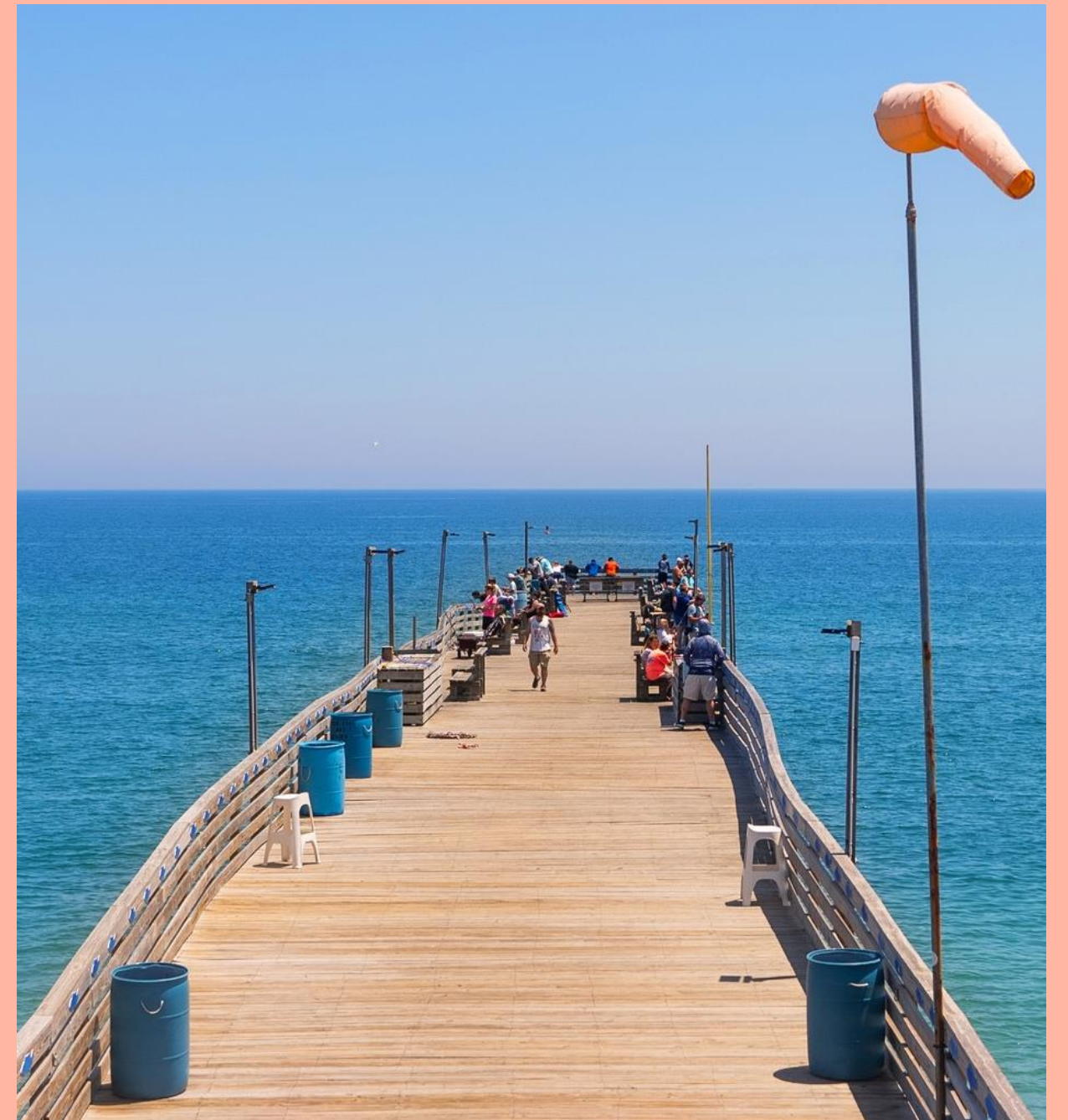
Dare County Monthly Hotel Performance

April 2026

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



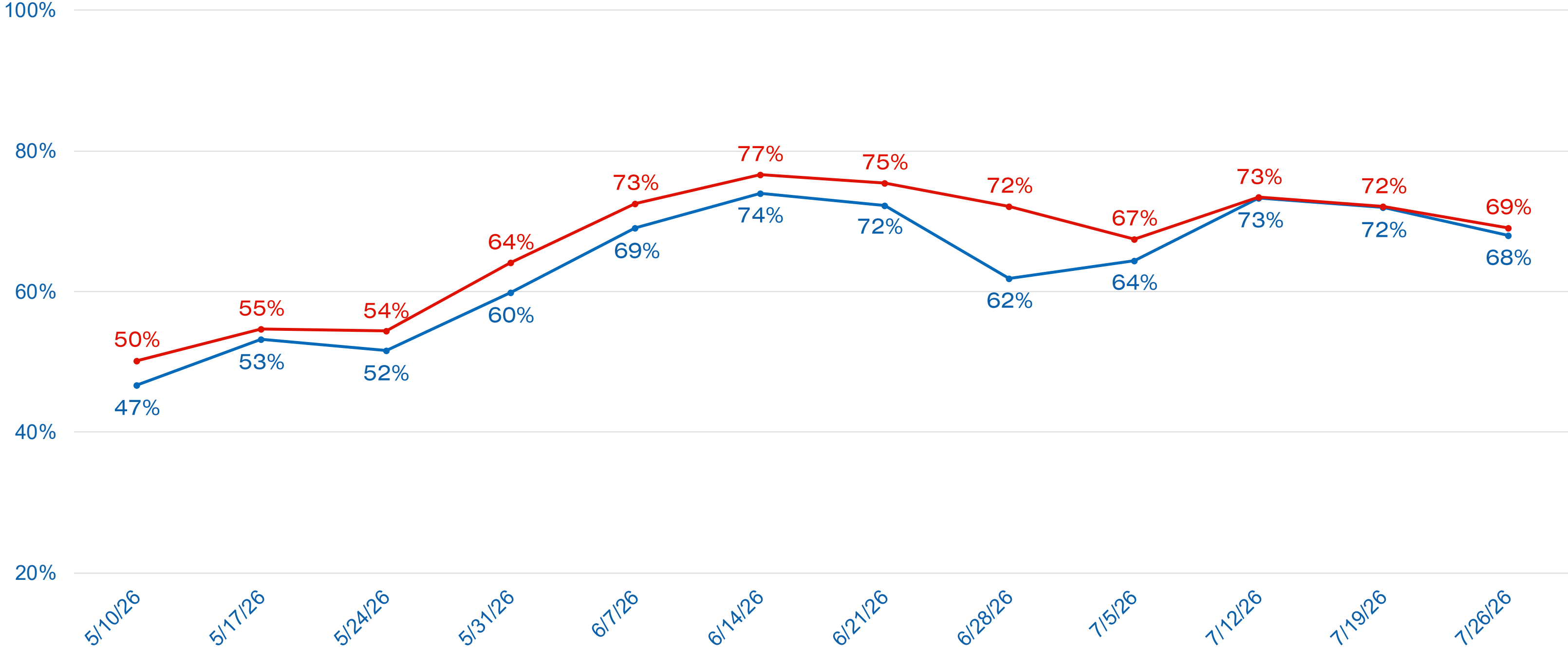
SHORT-TERM RENTAL PACING DATA



DARE COUNTY – PROJECTED ADJUSTED PAID OCCUPANCY BY WEEK

Pace by Week – Projected Adjusted Paid Occupancy (%)

—●— Current Year —●— Previous Year

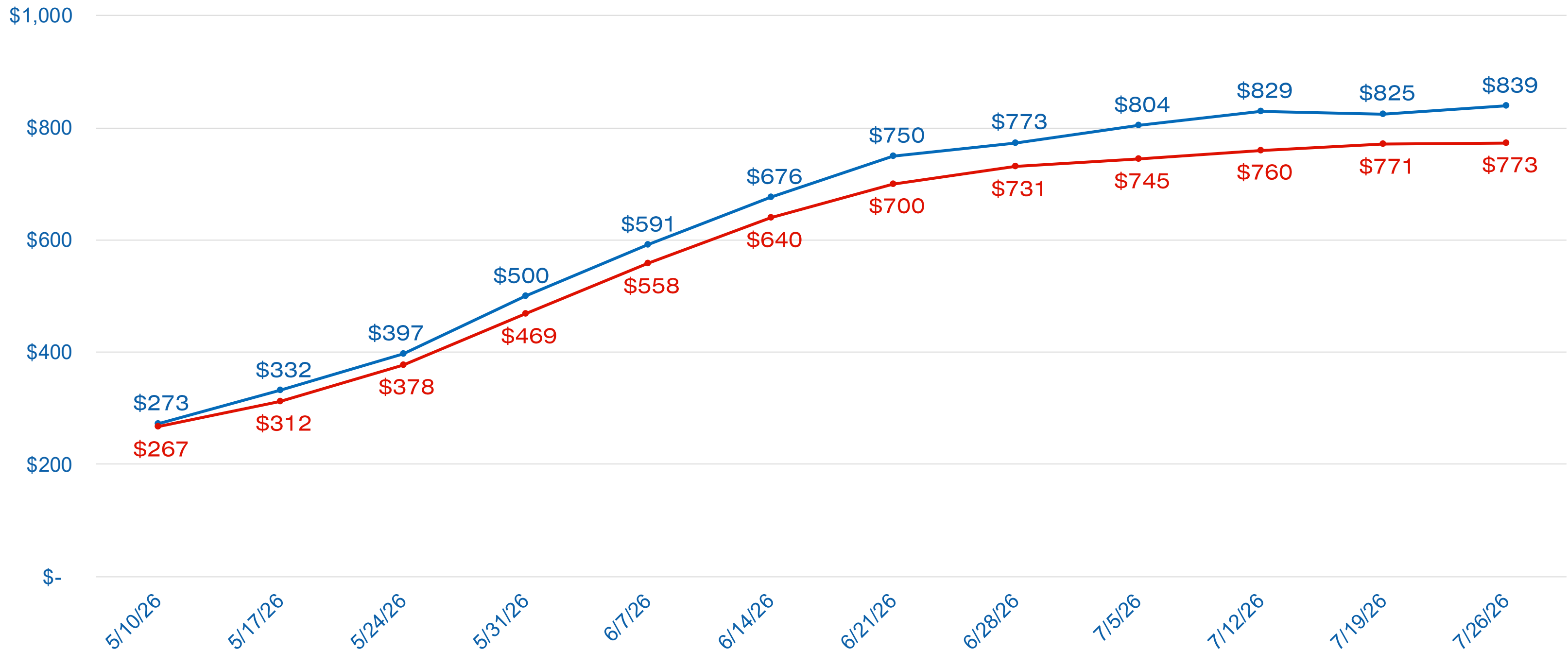


Source: Key Data (as of 5/11/2026)

DARE COUNTY – PROJECTED AVERAGE DAILY RATE

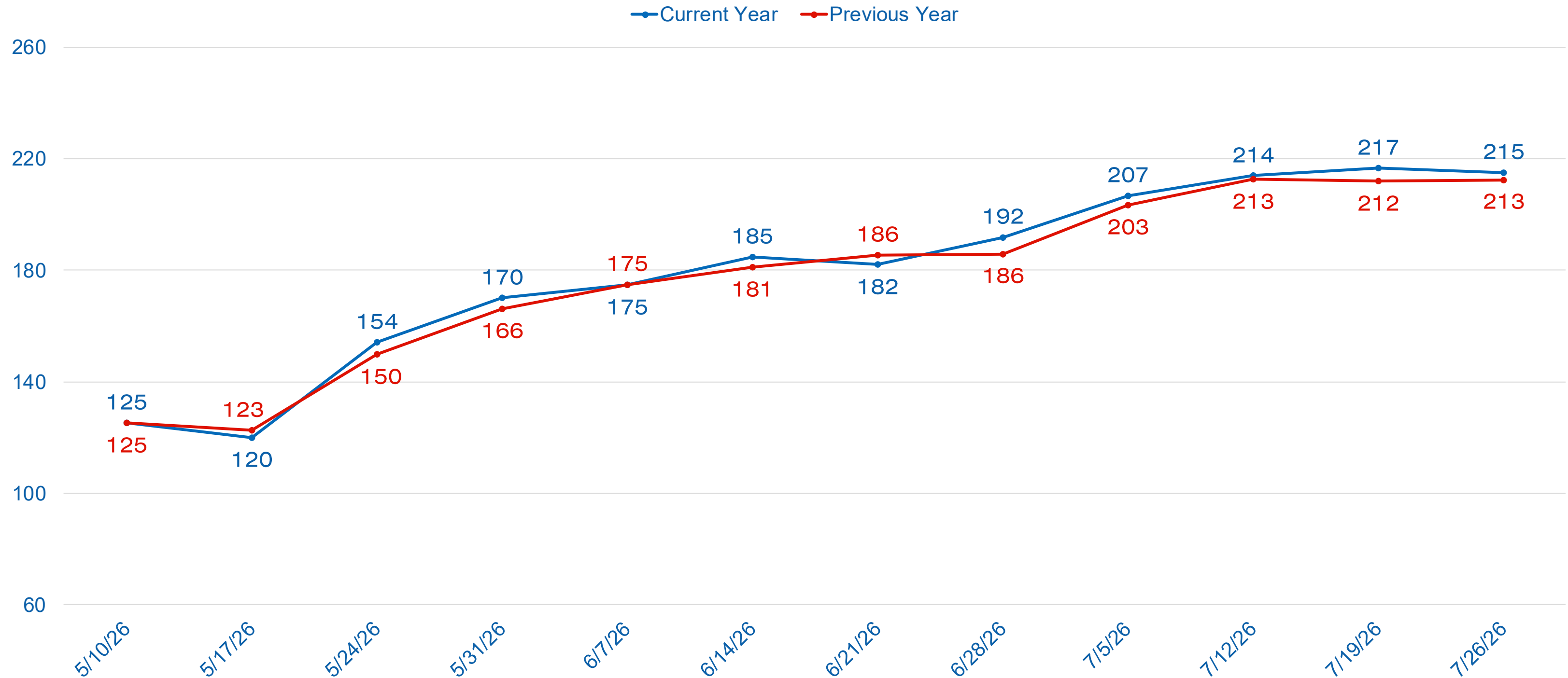
Pace by Week – Projected Average Daily Rate (\$)

—●— Current Year —●— Previous Year



DARE COUNTY – PROJECTED AVERAGE BOOKING WINDOW (DAYS)

Pace by Week – Projected Average Booking Window (Days)

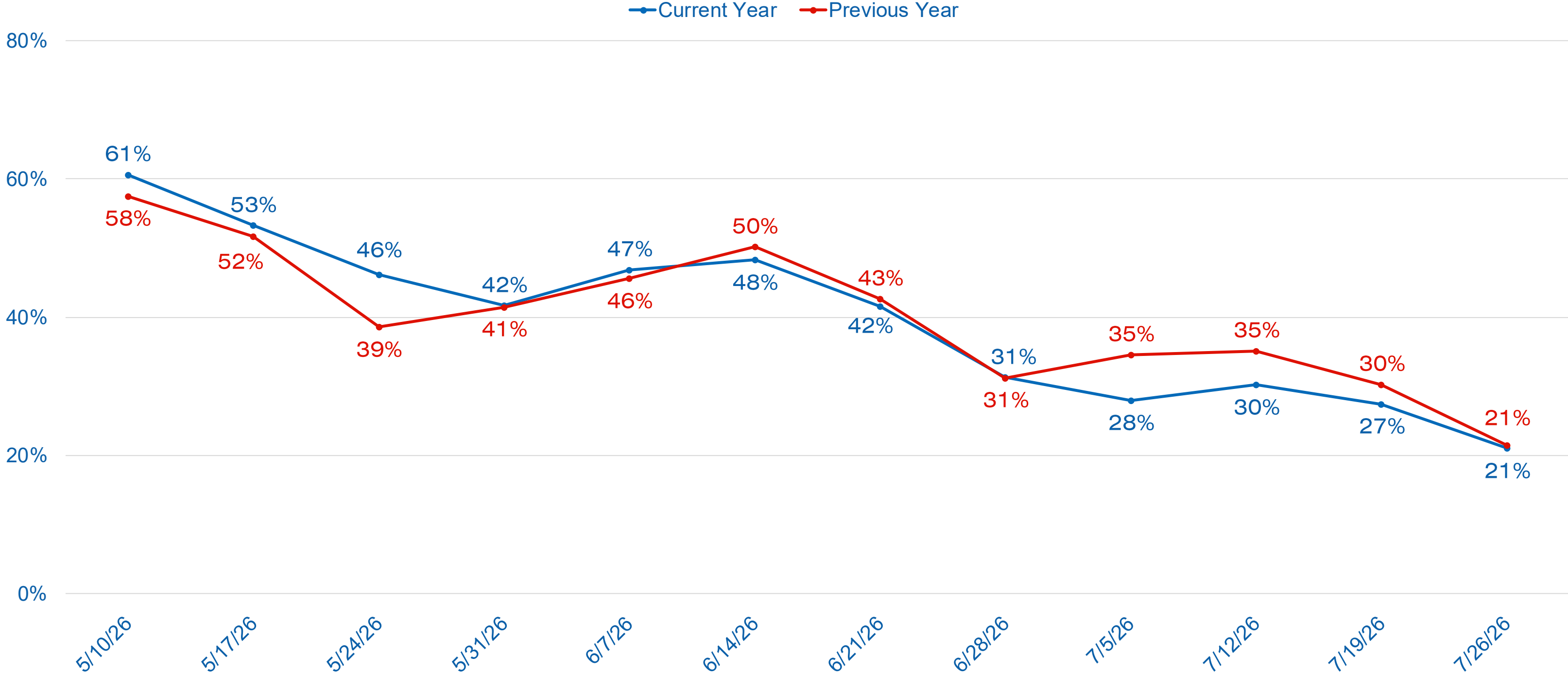


HOTEL PACING DATA



DARE COUNTY HOTELS – PROJECTED PAID OCCUPANCY

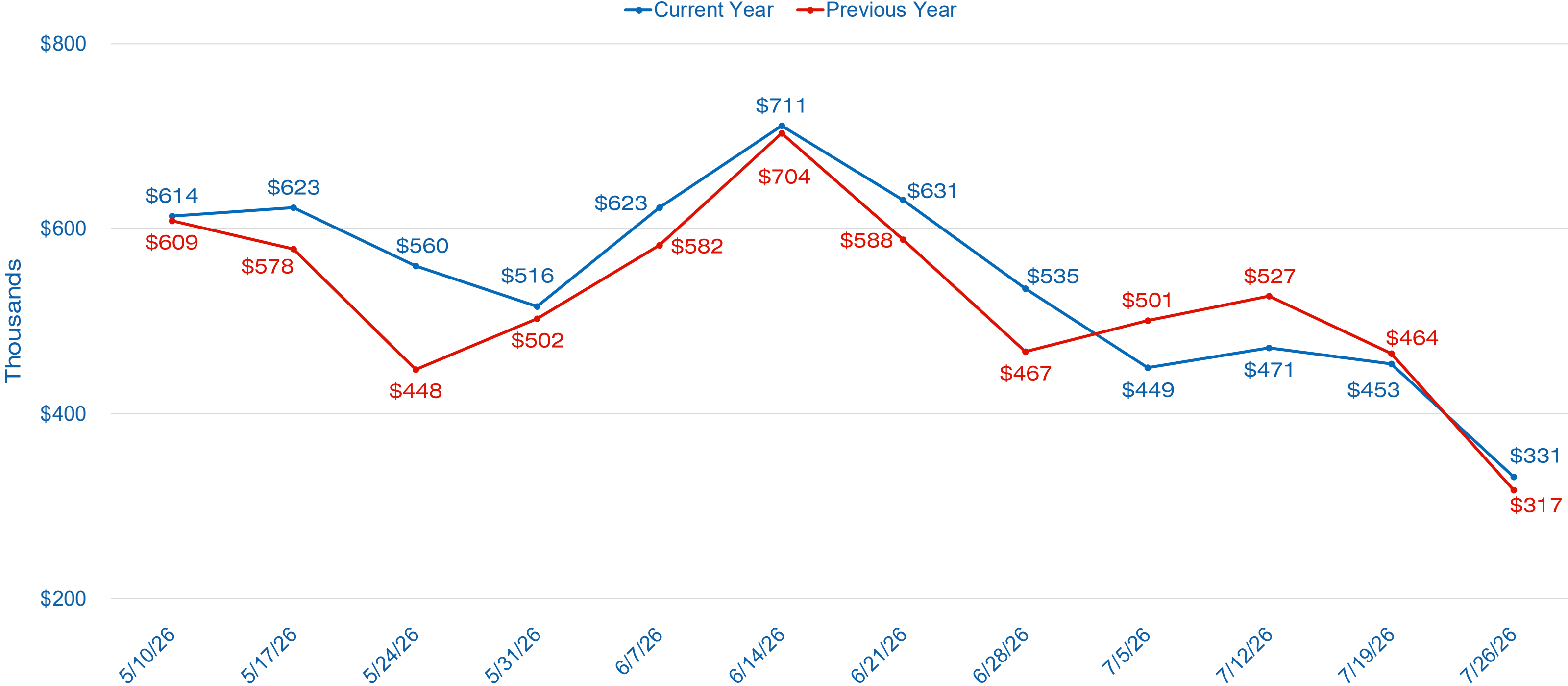
Pace by Week – Projected Paid Occupancy (%)



Source: Key Data (as of 5/11/2026, Sample = 12 hotels, 1,496 rooms)

DARE COUNTY HOTELS – REVENUE

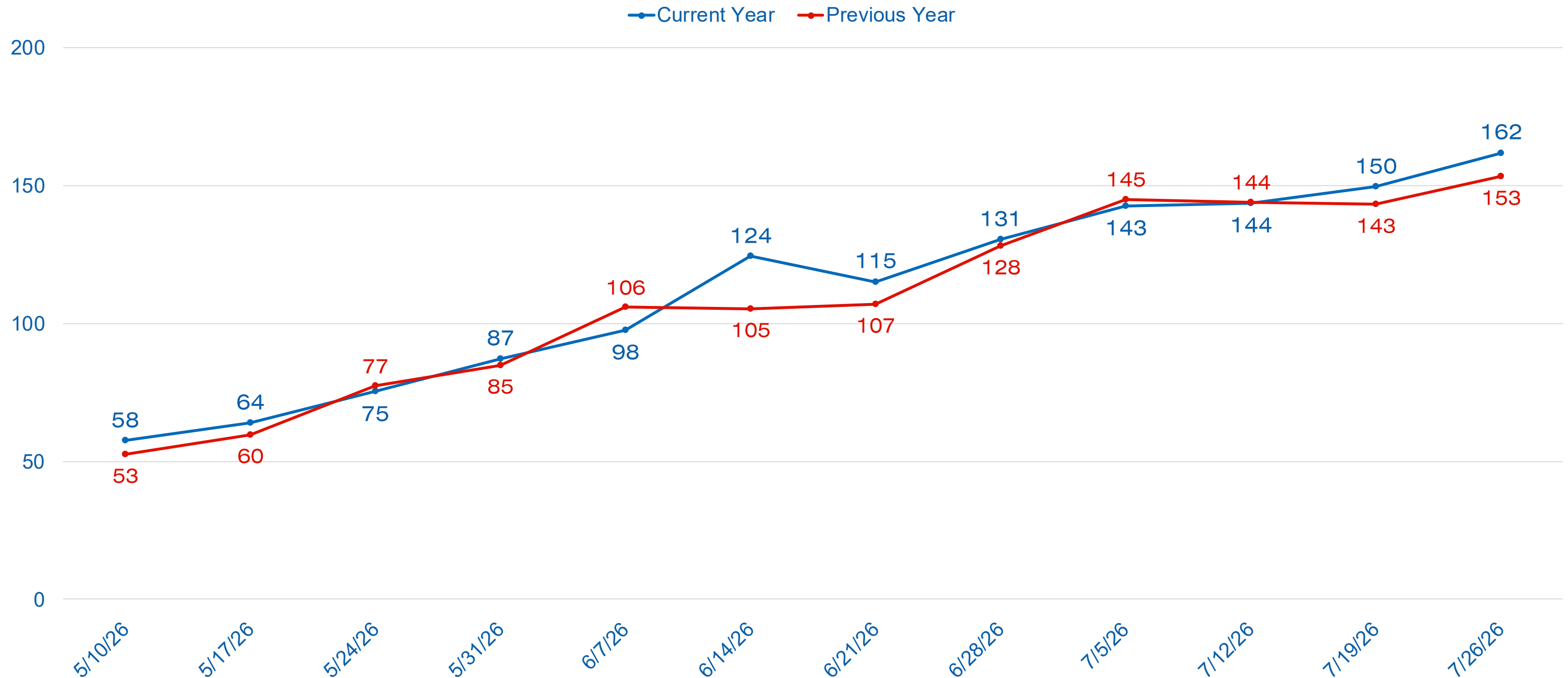
Pace by Week – Projected Revenue (\$)



Source: Key Data (as of 5/11/2026, Sample = 12 hotels, 1,496 rooms)

DARE COUNTY HOTELS – AVERAGE BOOKING WINDOW (DAYS)

Pace by Week – Projected Average Booking Window (Days)



Source: Key Data (as of 5/11/2026, Sample = 12 hotels, 1,496 rooms)

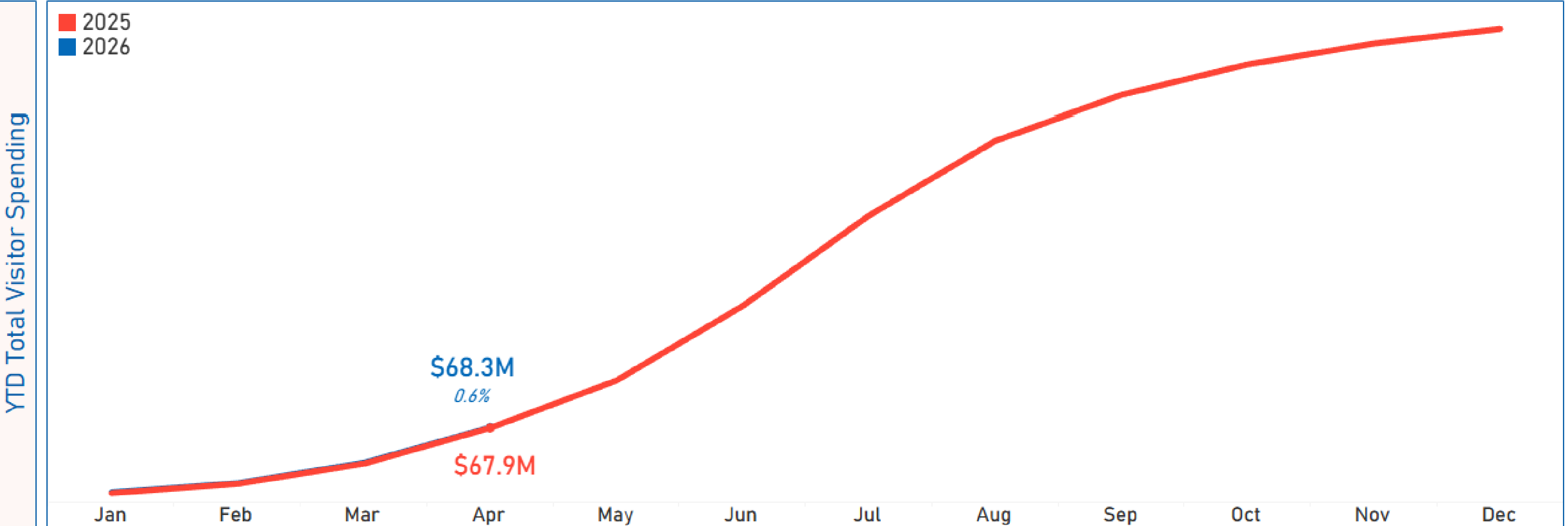
VISA DESTINATION INSIGHTS



Outer Banks Monthly Visitor Spending Calendar YTD Through April 2026

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

YTD '26	Domestic Visitor		International Visitor		Visitor Grand Total	
	Spend Amount	Card Count	Spend Amount	Card Count	Spend Amount	Card Count
	\$67,725,295	380,872	\$585,294	2,149	\$68,310,589	383,021
YOY	0.7%	-1.2%	-9.9%	-19.8%	0.6%	-1.3%



Outer Banks Monthly Visitor Spending

Top Domestic Origin Markets - April 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
Virginia Beach-Norfolk-Newport News, VA-NC	\$6,026,521		-0.5%	34,528	-4.5%
Washington-Arlington-Alexandria, DC-VA-MD-WV	\$3,334,881		-12.8%	14,879	-7.5%
Richmond, VA	\$2,467,616		2.3%	12,128	1.3%
Raleigh-Cary, NC	\$1,325,177		0.6%	7,532	-3.8%
Elizabeth City, NC	\$907,054		4.2%	7,086	0.0%
Charlotte-Concord-Gastonia, NC-SC	\$714,262		4.0%	3,545	-3.1%
New York-Newark-Jersey City, NY-NJ-PA	\$711,176		-15.3%	3,368	-10.2%
Baltimore-Columbia-Towson, MD	\$689,399		-16.8%	3,150	-12.5%
Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	\$679,643		-6.0%	3,197	-1.6%
Charlottesville, VA	\$387,558		13.9%	1,706	1.7%
Boston-Cambridge-Newton, MA-NH	\$384,321		28.0%	1,282	1.7%
Durham-Chapel Hill, NC	\$366,344		-17.5%	2,146	-27.0%
Greensboro-High Point, NC	\$333,602		-3.7%	1,764	-3.5%
Salisbury, MD-DE	\$332,984		0.6%	1,440	0.3%
Greenville, NC	\$305,246		19.6%	2,303	8.7%

DIGITAL MARKETING METRICS



Outer Banks Visitors Bureau

FY25-26 Paid Media

April 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 FY25-26 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.

April 2026 Highlights

- **Paid Media:** Video views are up 215% year over year, while impressions have increased 82%, driven primarily by the extended Spring–Summer flight and the addition of the Outside Custom Partnership.
 - Spring-Summer: The Outside Custom Partnership generated over 3MM video views this month across linear and streaming TV, as well as in-line and pre/mid-roll promotional videos. The custom partnership will run through May.
 - Continuity:
 - The Expedia traffic-driving campaign launched on April 15 and has already driven nearly 500 clicks to the OBX curated landing pages on Expedia, Hotels.com, and VRBO, helping showcase properties directly to travelers actively searching for accommodations.
 - The CTR on Google Paid Search has grown for the 6th month in a row, an overall 5 pt increase since October.
 - Native supported Outer Edge, Crab Week (3x creatives), and Travel Deals. All creatives generated a CTR of 0.39% or higher, with the Outer Edge creative, "The Real OBX," performing strongest at 0.42%. Users in the Email Retargeting audience who clicked on the Travel Deals creative spent the most time on site, averaging 1 minute 45 seconds.
- **Website:** Total monthly sessions were down 9% YoY, primarily driven by a decrease in organic traffic.
 - The /things-to-do/ page saw the largest volume increase at +31.6K or +33%, mainly driven by paid social (29%) and paid search (15%).
 - March generated 5.1K travel guide requests on the site, and 3.8K PDF travel guide requests.
- **Email:** 97K emails were sent across consumer marketing contact sublists and various workflows, achieving an overall 17% open rate, 13% CTR (opens), and 0.55% bounce rate.
 - The April monthly OBX email titled "Blue-Sky Dreaming on the OBX" garnered an overall 16% open rate and 11% CTR (opens).
 - An A/B test was conducted to evaluate subject line effectiveness. Group A received "Summer's sneaking up {First Name}...any plans yet?" while Group B received "Experience OBX spring in full bloom." Group A received a 15% open rate, while Group B received an 18% open rate, indicating that more direct copy without personalization may be more effective.
 - *Note: The Foodie workflow audience was intentionally excluded from this send to minimize message frequency and ensure they receive the Featured Foodie email.*
 - A Featured Foodie newsletter titled "A Rare Catch on the OBX" was sent out to the Foodie workflow and generated a 25% open rate and 16% CTR (opens). The link to see participating restaurants in soft-shell crab week generated the most clicks at 22%.
 - Among workflows, the Foodie workflow performed the best, achieving a 38% open rate and 40% CTR (opens).

Dashboard was updated on 5/13/26. Data is reviewed and validated through - Media, Email, and Website: 4/30/26.

FYTD = Fiscal Year Total To-Date (includes all data from July 2025 through the listed 'reviewed and validated date').

Monthly Delivered v. Previous Year = Month Of v. Same Month Previous Year i.e. July 2025 vs. July 2024

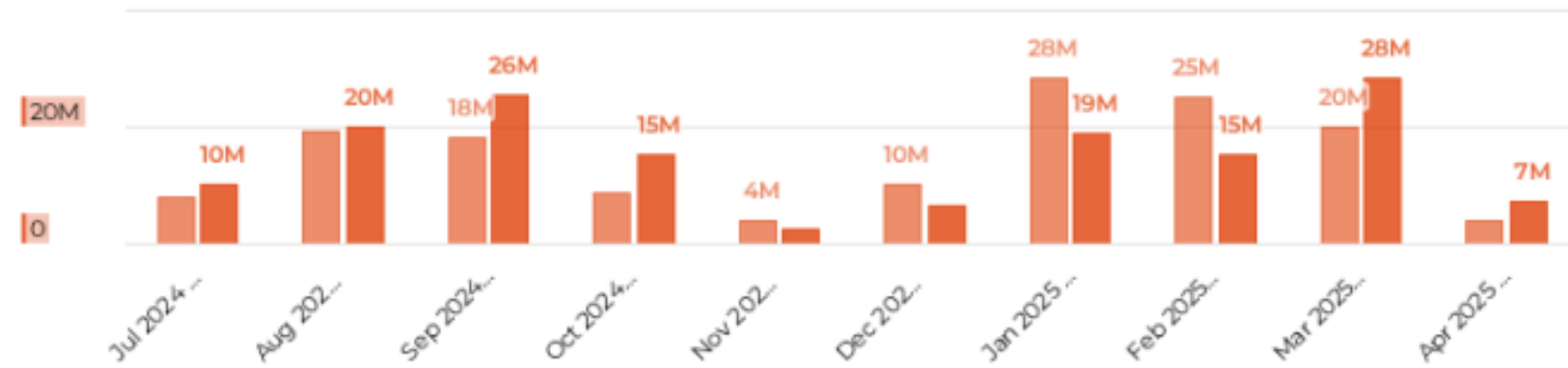
delivery trends

FYTD: Impressions

149,847,183
▲ 2.56% (3,740,430)

Monthly Impressions Delivered vs. Previous Year

Impressions

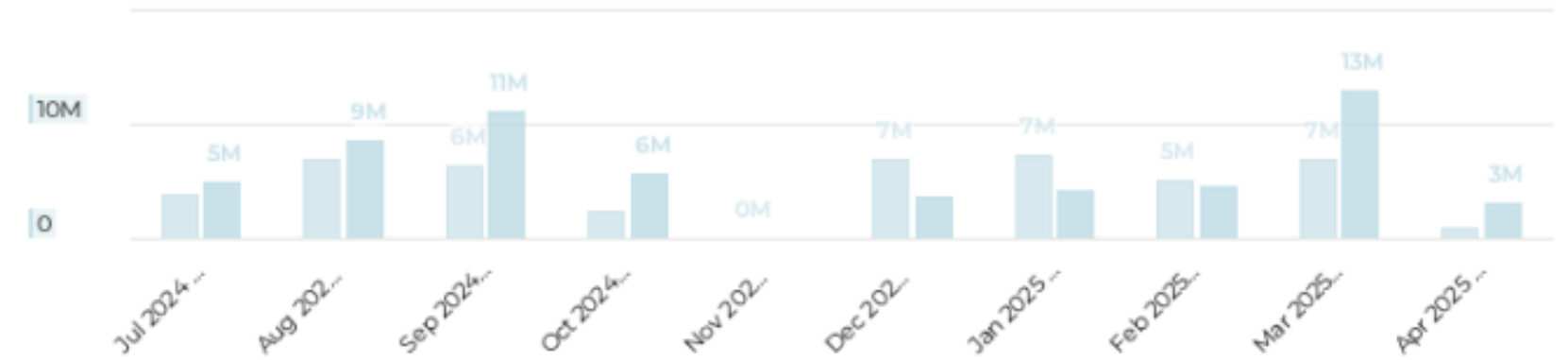


FYTD: Video Views

58,593,529
▲ 25.57% (11,932,730)

Monthly Video Views Delivered vs. Previous Year

Video Views

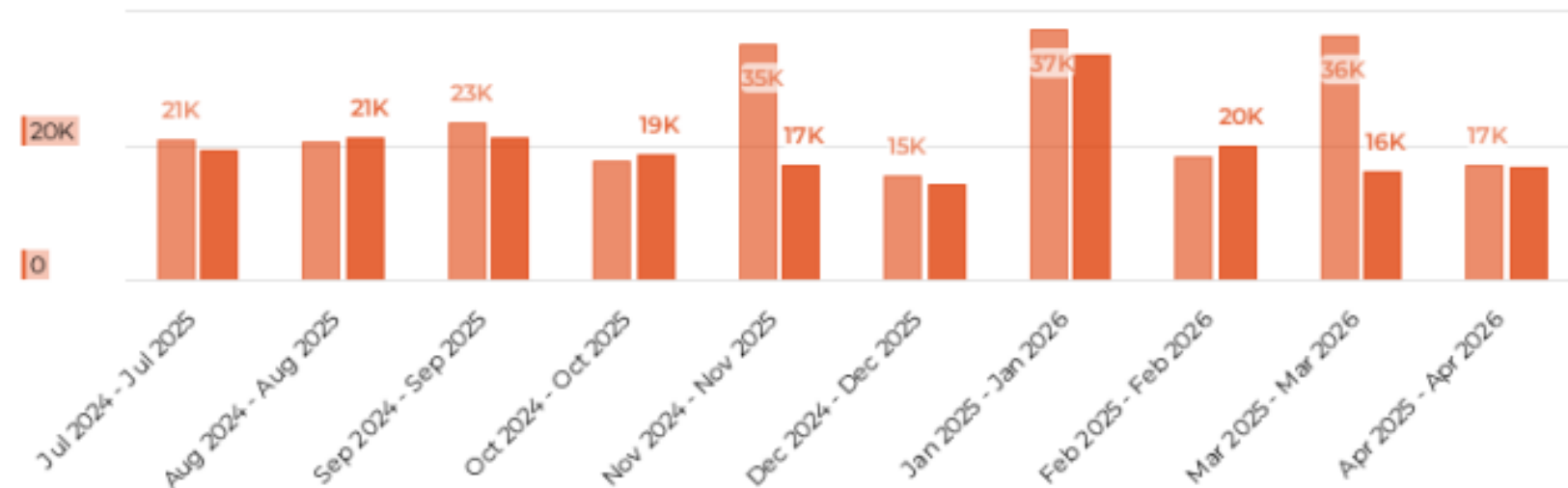


FYTD: Email Opens

197,276
▼ -18.26% (-44,083)

Monthly Email Opens v. Previous Year

Email Opens

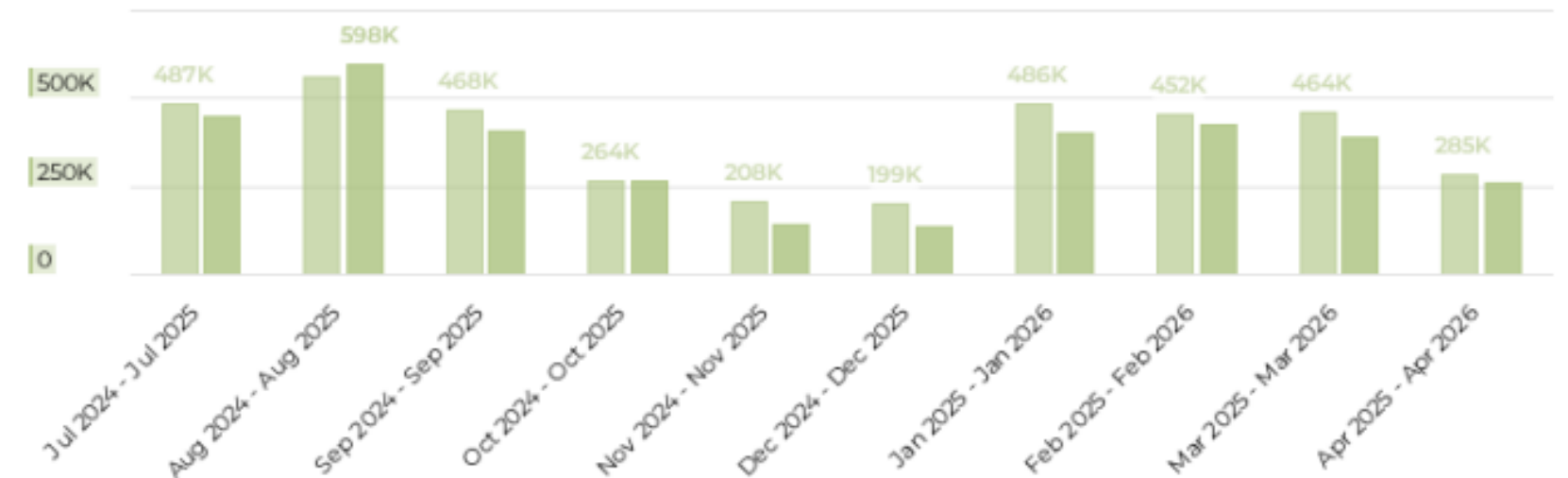


FYTD: Website Sessions

3,467,040
▼ -10.48% (-405,963)

Monthly Website Sessions v. Previous Year

Sessions





Executive Summary

Drive Awareness

KPI: Impressions

Performance As Of:	Apr 2026	Apr 2025	Base Goal	Stretch Goal
Current Month	4,937,528	5,015,714	4,693,973	6,350,670
Cumulative Fiscal	45,633,559	51,235,053	43,219,547	58,473,504
Cumulative % To Target		89%	106%	78%

Drive Intent

KPI: Website Sessions Referred by Social Sources

Performance As Of:	Apr 2026	Apr 2025	Base Goal	Stretch Goal
Current Month	57,058	31,429	31,118	37,855
Cumulative Fiscal	390,769	316,974	310,021	377,139
Cumulative % To Target		123%	126%	104%

Engage

KPI: Likes, Comments, Shares, Saves/Favorites, Video Views, Link Clicks, Media Clicks

Performance As Of:	Apr 2026	Apr 2025	Base Goal	Stretch Goal
Current Month	170,764	199,470	257,226	314,387
Cumulative Fiscal	2,825,911	2,209,708	2,219,438	2,712,647
Cumulative % To Target		128%	127%	104%

Convert

KPI: Mini-Guide Requests, Physical Guide Requests, Guide PDF Downloads, eNews Sign-Ups

Performance As Of:	Apr 2026	Apr 2025	Base Goal	Stretch Goal
Current Month	5,062	2,188	1,995	2,330
Cumulative Fiscal	31,920	21,834	21,217	24,786
Cumulative % To Target		146%	150%	129%

Key Messaging:

- Wildlife and fishing on the OBX
- What to do on the OBX

Performance Overview:

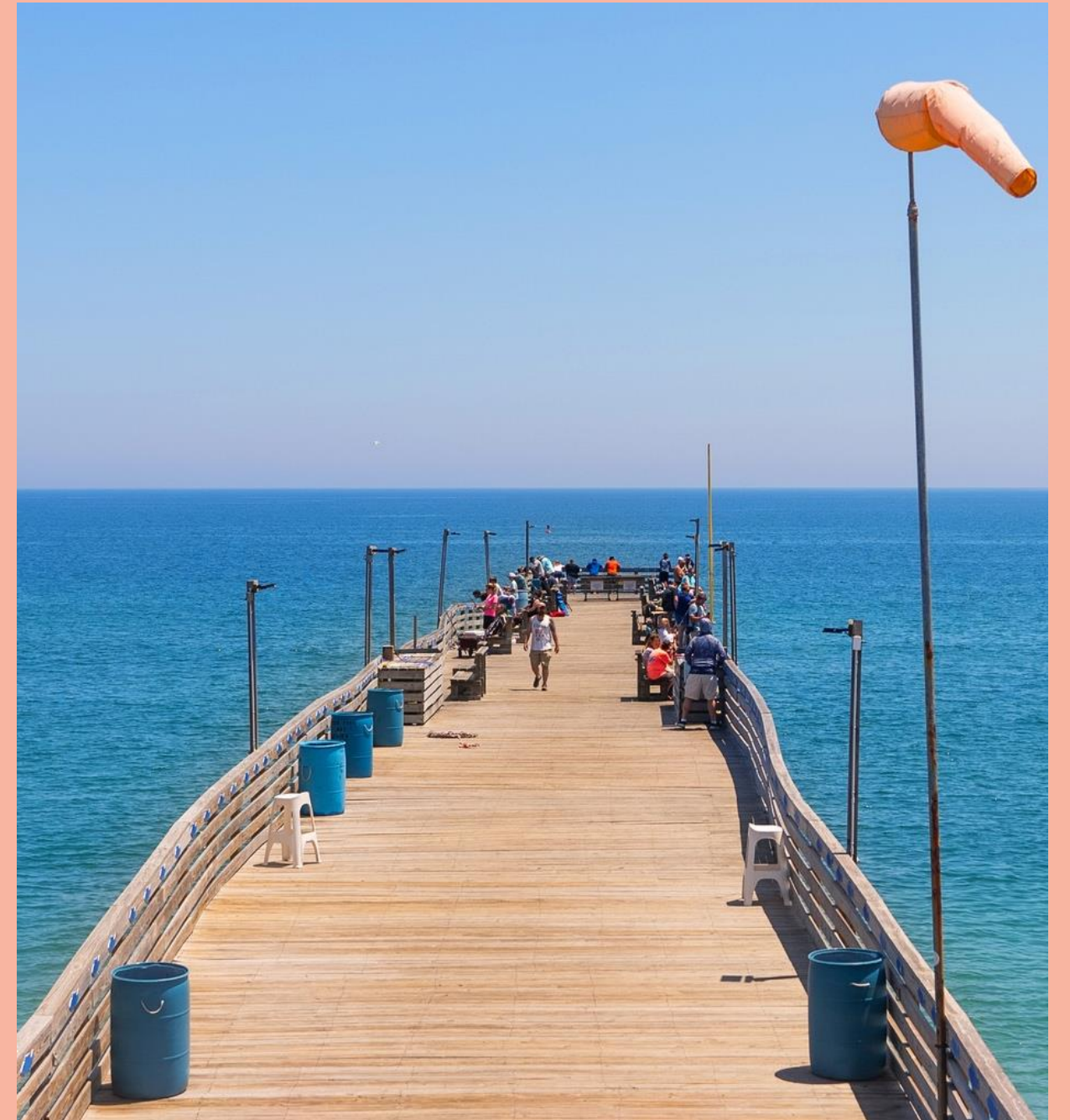
- All KPIs are trending above projected base goal.
- At 2.8MM with two months remaining, engagements have **exceeded the 2.5MM end-of-year base goal by 291K**; only 272K short of surpassing the 3.1MM EOY stretch goal.
- With 391K website sessions, social efforts have **exceeded the EOY base goal by 35.5K**; only 41K short of the 432K EOY stretch goal, nearly surpassing the high-traffic pandemic fiscal years.
- Social efforts have generated 32K conversions so far this year, having **surpassed the 27.9K EOY stretch goal**.
- A trend that became more apparent this month is the social audience recognizing certain featured faces, further tying the OBX to the people that make the destination special.

Next Steps & Recommendations:

- Increase conversion ad budget allocated towards eNews ads to increase subscription growth.
- Going into peak Summer travel season, messaging will focus on safety and accessibility
- Upcoming calendars will start to include freshly captured content from the April session.
- Soft Shell Crab Week promotion in May featuring OBVB produced video.

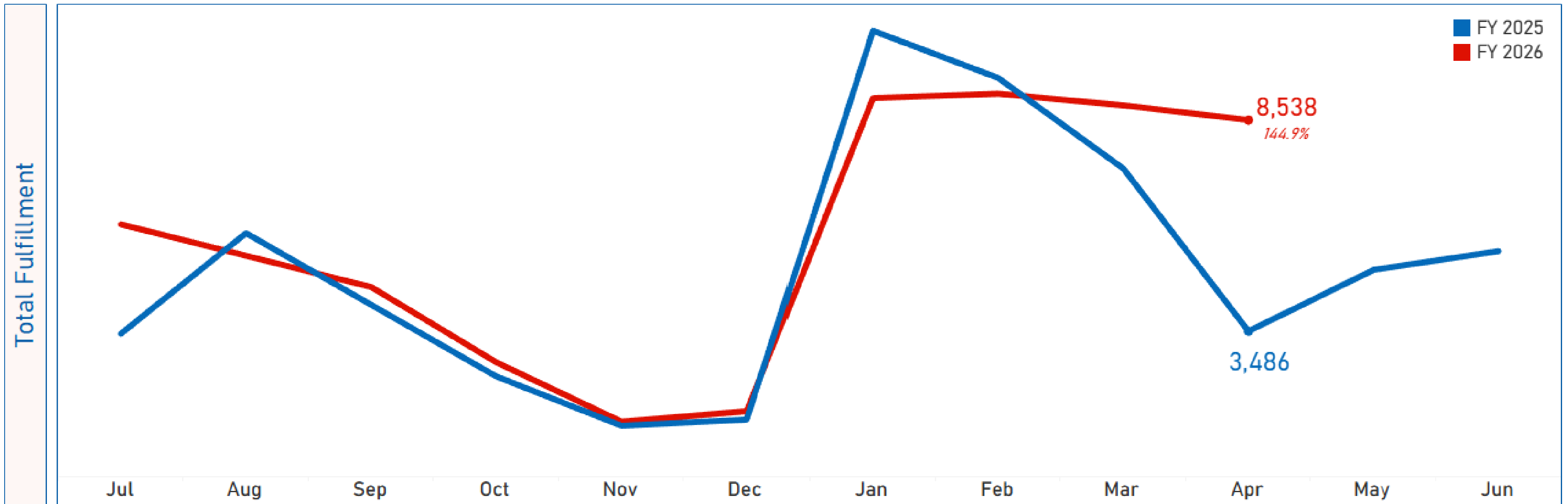
The Outer Banks Visitors Bureau

BUREAU FULFILLMENT



Outer Banks Visitors Bureau Monthly Fulfillment April 2026

YOY	Type of Request					Total
	Calls	Print	Online	eGuide	Mail	
	40	0	4,686	3,811	1	8,538
	42.9%	-100.0%	97.1%	271.8%	0.0%	144.9%



U.S. MARKET REVIEW

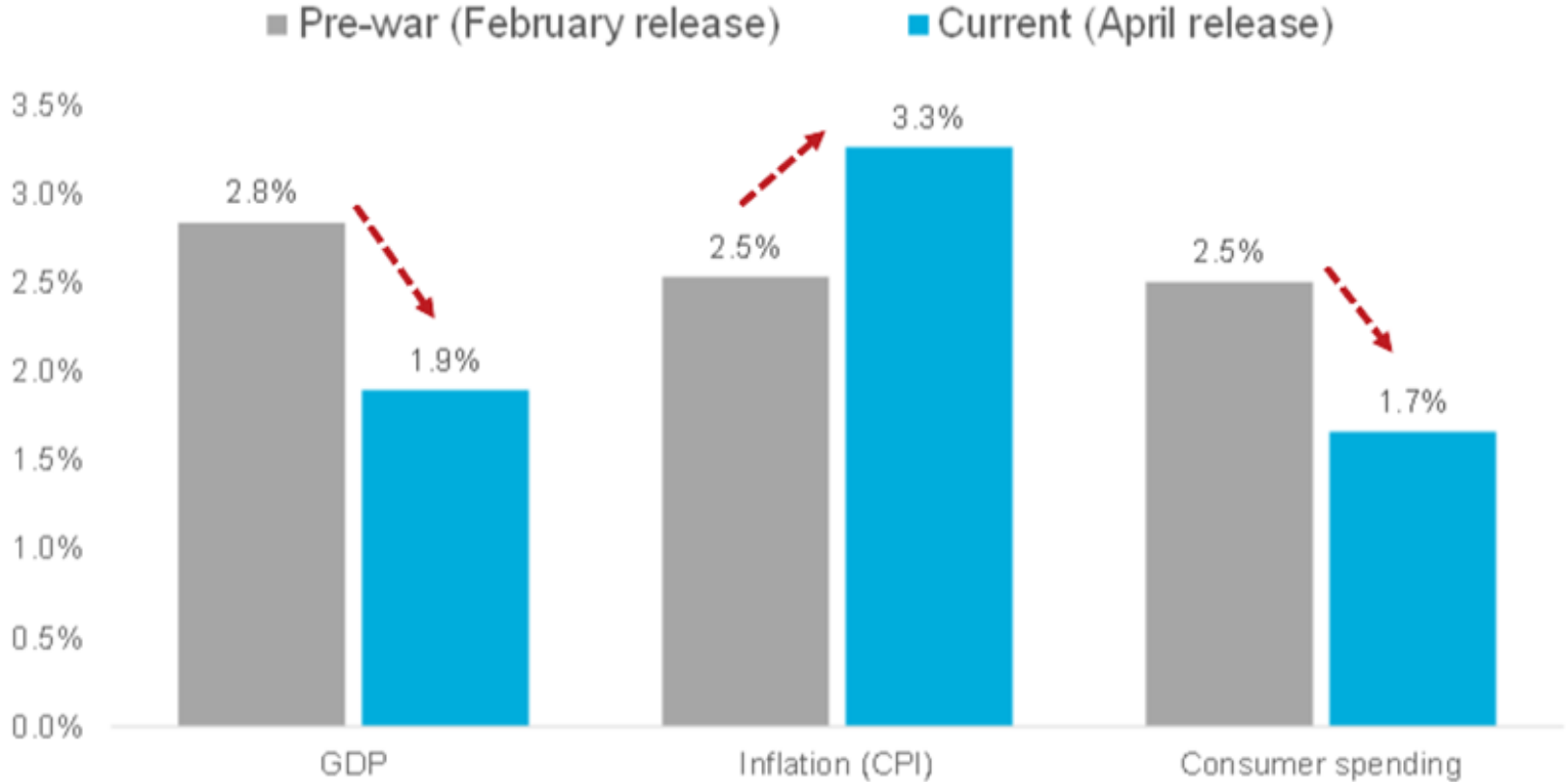


U.S. ECONOMIC OUTLOOK

Middle East Conflict: Consumer buying power to slow with oil-induced inflation

Economic Outlook: US

Annual growth, 2026



Note: Real GDP, real consumer spending. Source: Oxford Economics

US GDP downgrade includes weaker-than-anticipated activity at the start of this year.

More spent on energy, means **less discretionary spending** and saving.

Heightened uncertainty and squeezed profit margins **reduce hiring and raise the possibility of layoffs.**

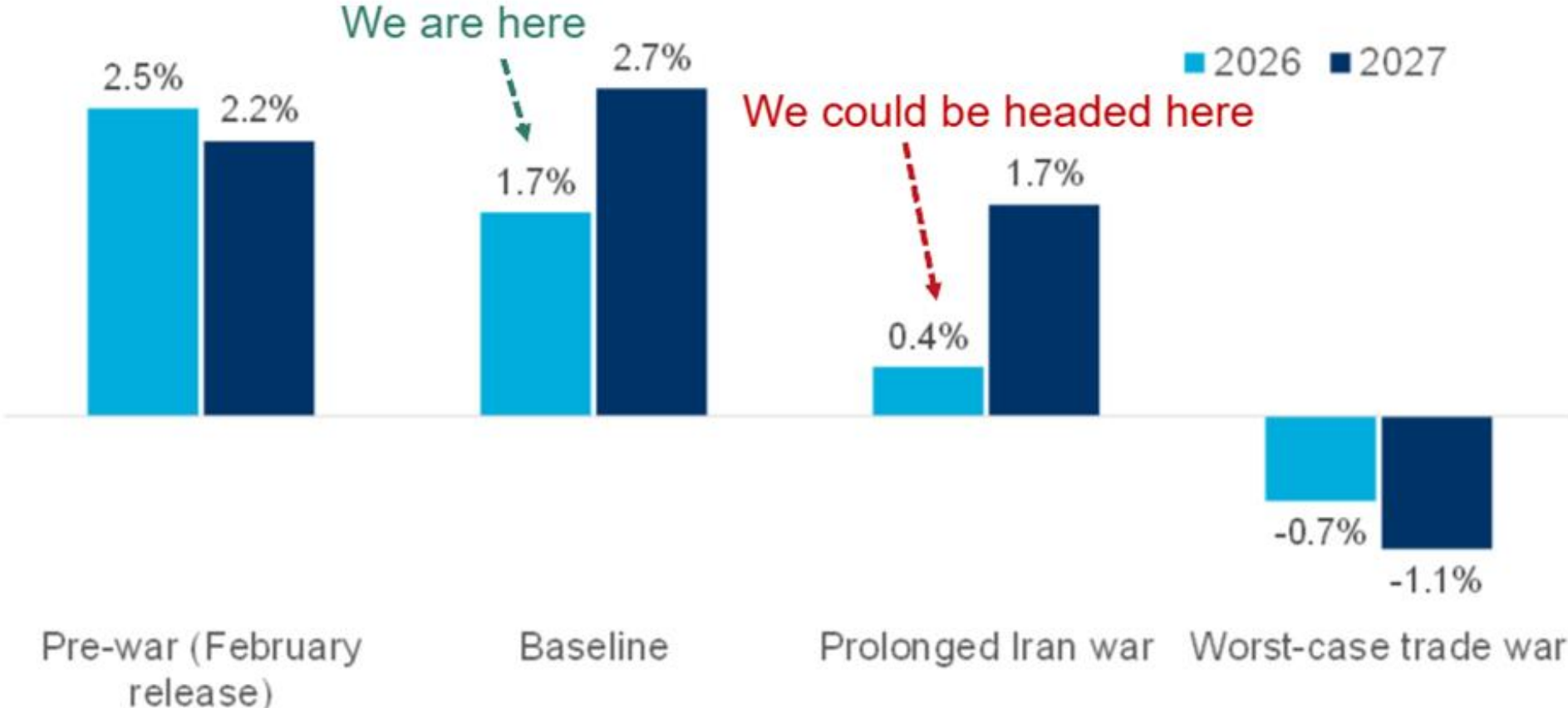


U.S. CONSUMER SPENDING

Downside scenarios: Prolonged war or severe trade war

Scenario Outlook: US Consumer Spending

Real, annual growth



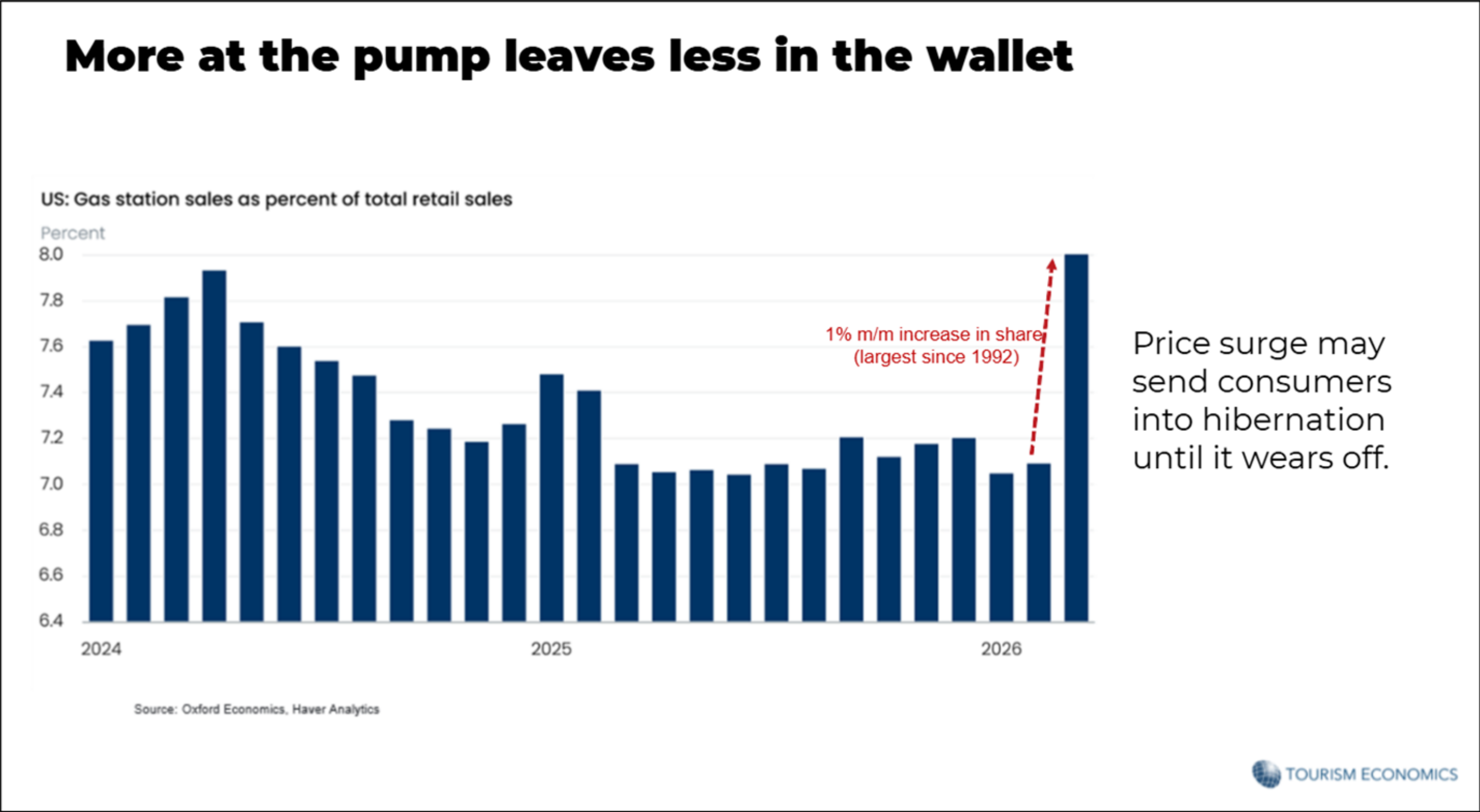
Separate from Iran... a worst-case trade war would bring an actual contraction...

...as trading partners retaliate with tariffs on US exports.

Source: Oxford Economics (Global Scenario Service, April 2026 release)

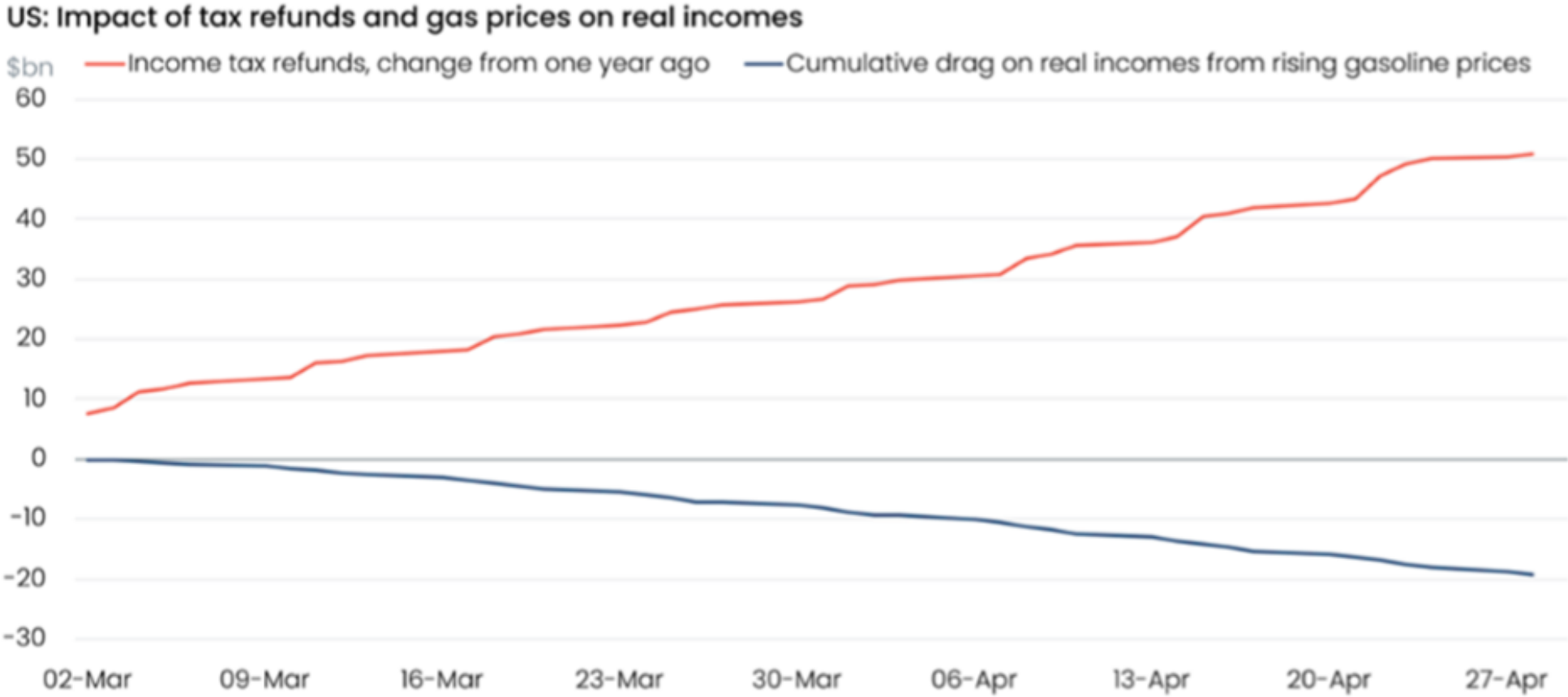


GAS STATION SALES TRENDS



TAX REFUNDS & GAS PRICES

Income tax refunds continue to more than offset the impact of higher gas prices



Consumers have received \$50bn in additional tax refunds but paid \$20bn additional on gas.

The buffer will fade the longer the war drags on.

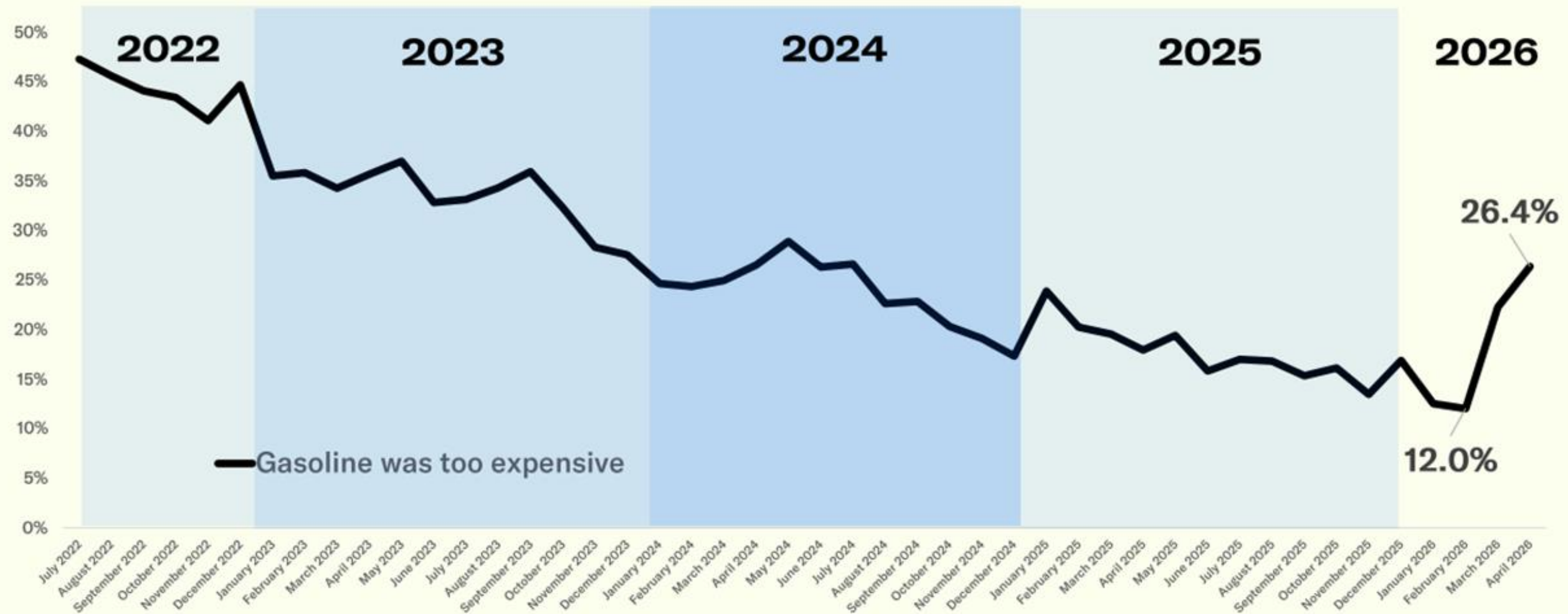
Source: Oxford Economics, Haver Analytics



CONCERNS IMPACTING TRAVEL DECISIONS

Gas Prices as a Deterrent to Travel is on the Rise

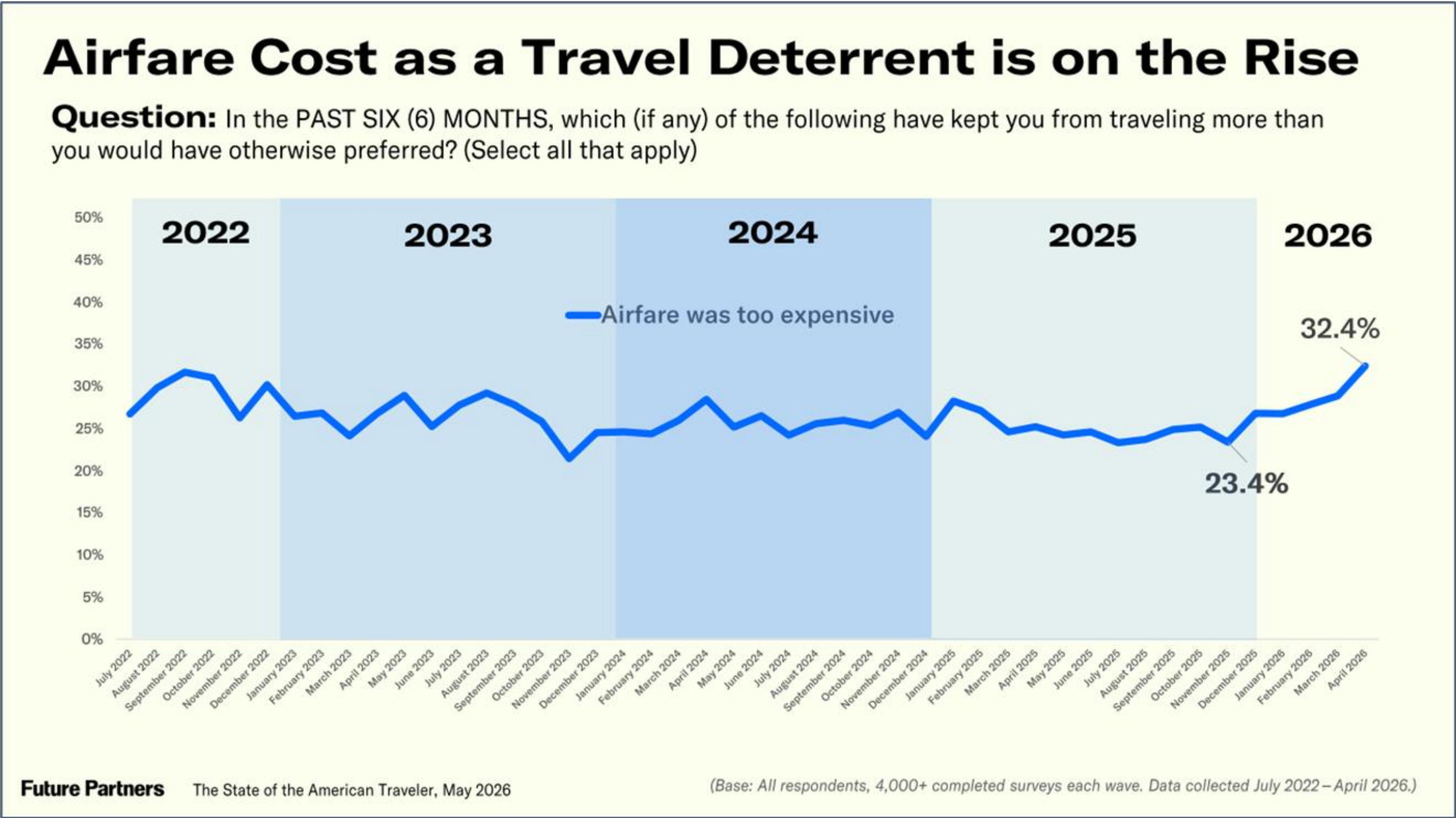
Question: In the PAST SIX (6) MONTHS, which (if any) of the following have kept you from traveling more than you would have otherwise preferred? (Select all that apply)



Future Partners The State of the American Traveler, May 2026

(Base: All respondents, 4,000+ completed surveys each wave. Data collected July 2022 – May 2026.)

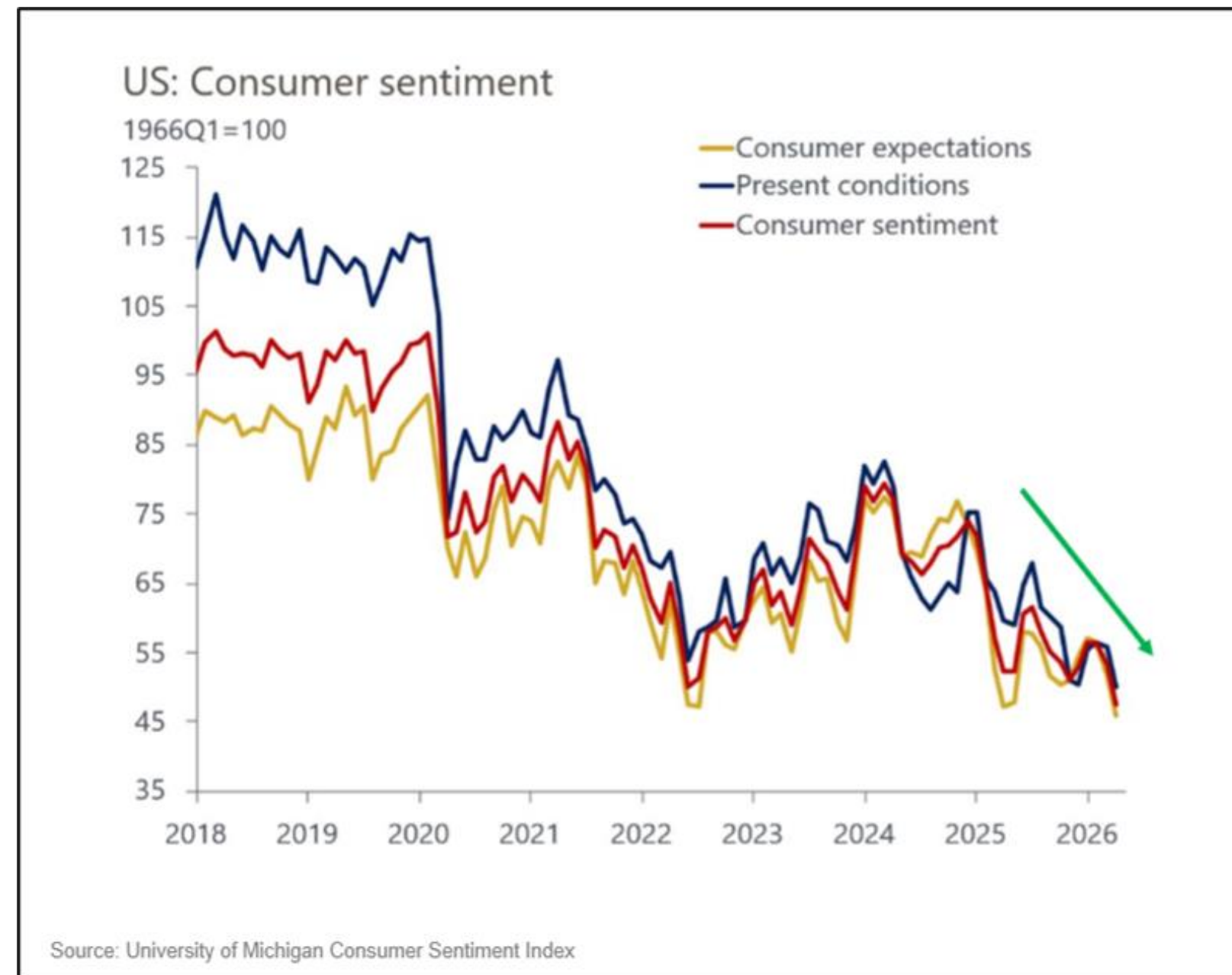
CONCERNS IMPACTING TRAVEL DECISIONS



ECONOMIC REVIEW

American Consumer Sentiment

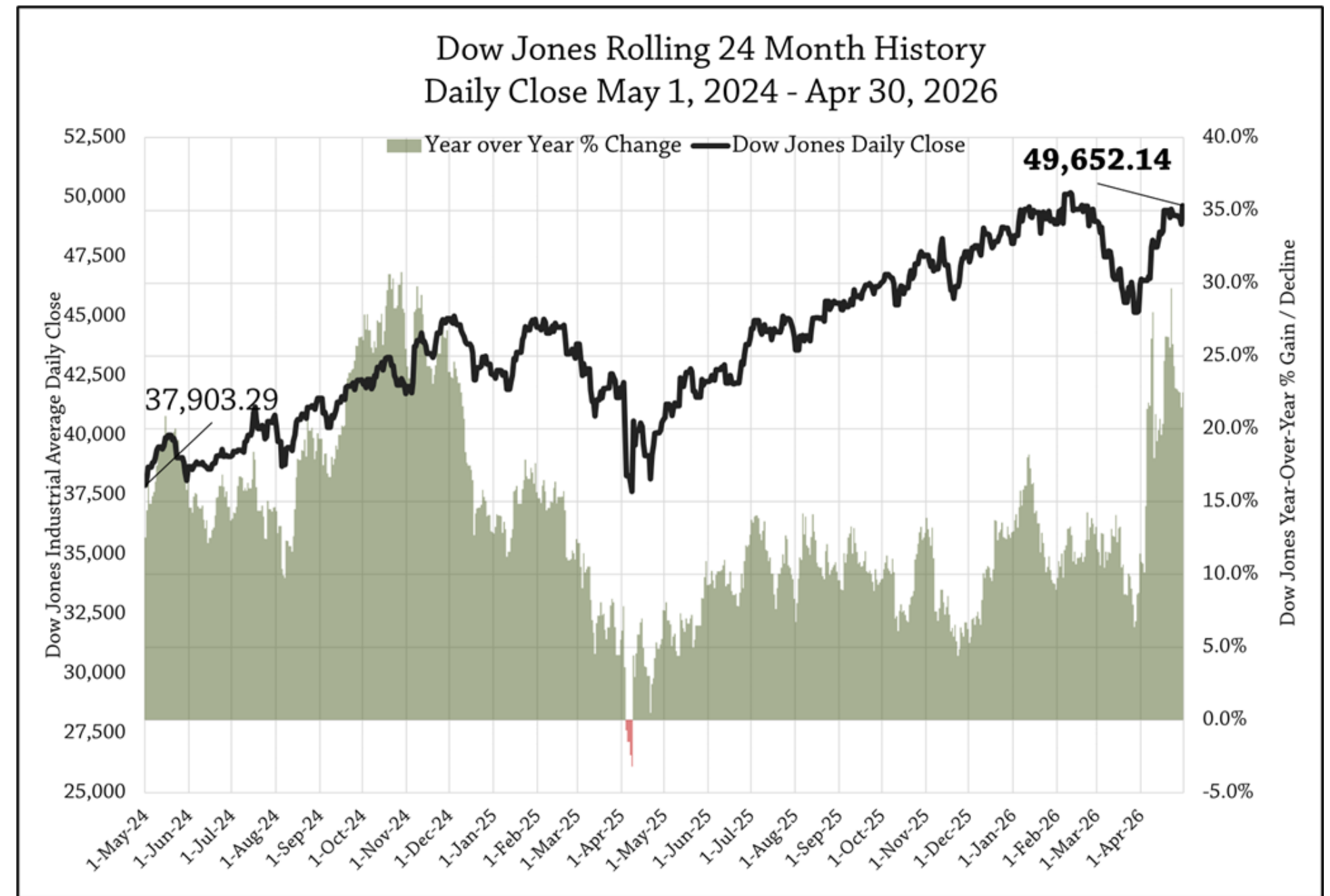
- The American consumer is more downbeat than ever, and US Consumer Sentiment reached a multi-year low in May.



ECONOMIC REVIEW

The Dow Jones Industrial Average

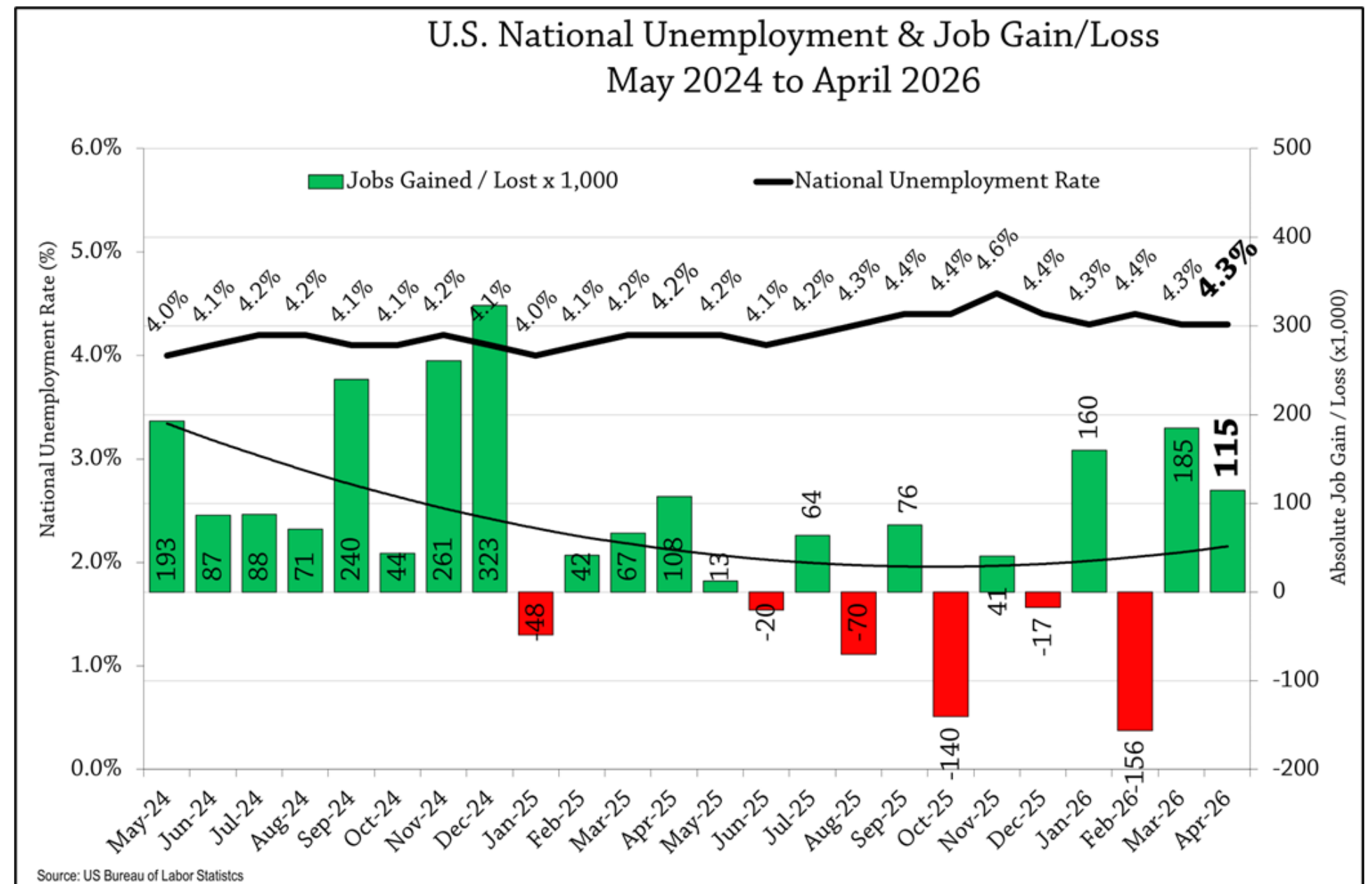
- “The DJIA added a dramatic 7.1%, or 3,310.6 points, in April to close the month at 49,652.1 points, an all-time high for a monthly close.”
- “This is a sharp reversal from the 5.2% decline recorded in March, which was largely driven by rising oil costs as the US-Iran war triggered global fuel shortages.”
- “Gains on the DJIA are typically mirrored in the S&P 500, which means that those that are invested in 401(k)s are seeing strong gains in their savings rates.”



ECONOMIC REVIEW

The National Unemployment Rate

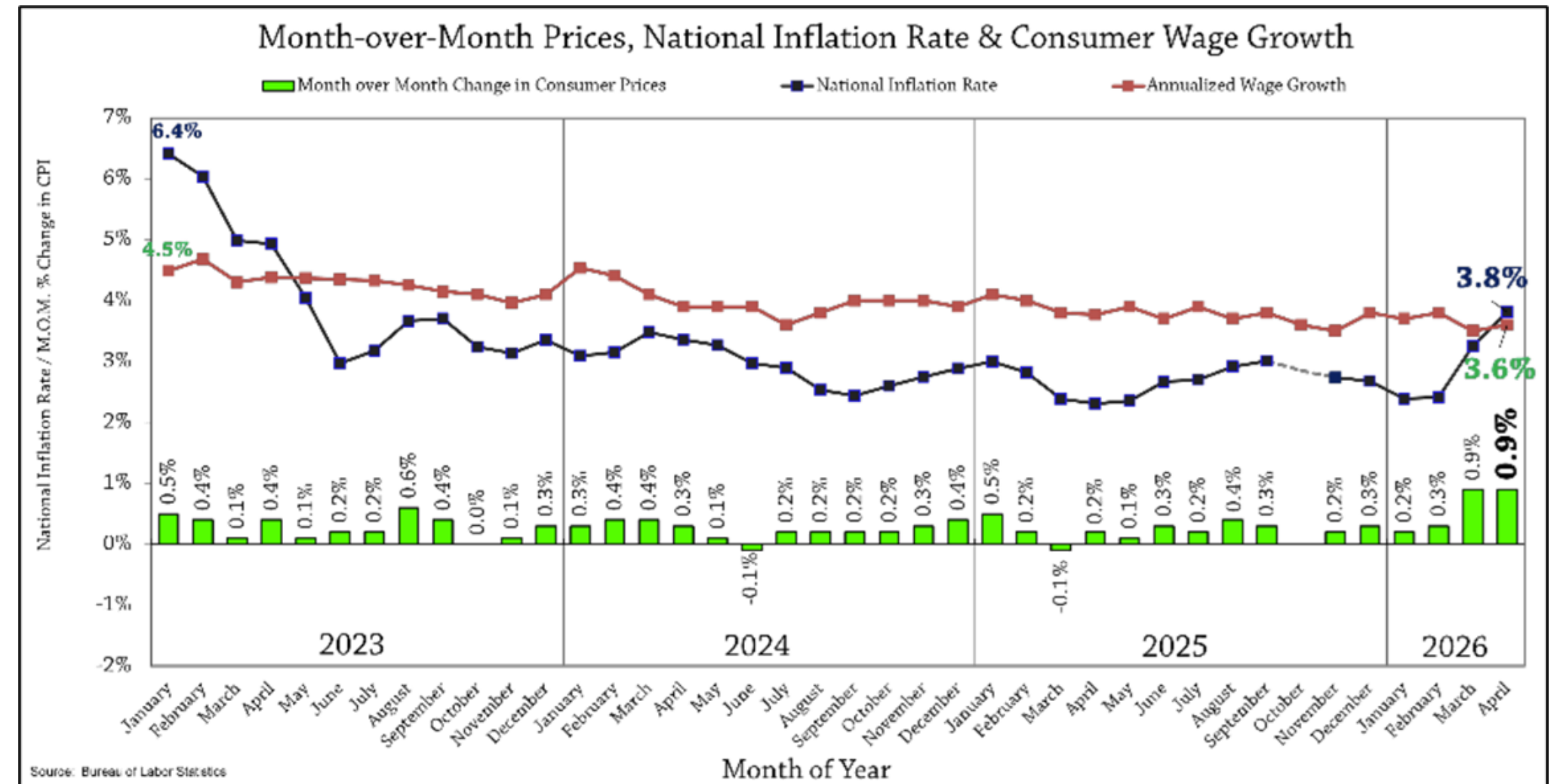
- “Job Creation and the National Unemployment Rate beat expectations for a second consecutive month in April, with employers adding 115,000 new jobs while the unemployment rate remained unchanged at 4.3%.”
- “This is the third time that the economy has added jobs in the last four months and the first consecutive month of gains since May 2025.”
- “Jobs for February were revised downward and March was revised upward, with the adjustments resulting in 16,000 fewer jobs created for those two months.”
- “Wages increased slightly year-over-year with pay up 3.6% compared to last year.”



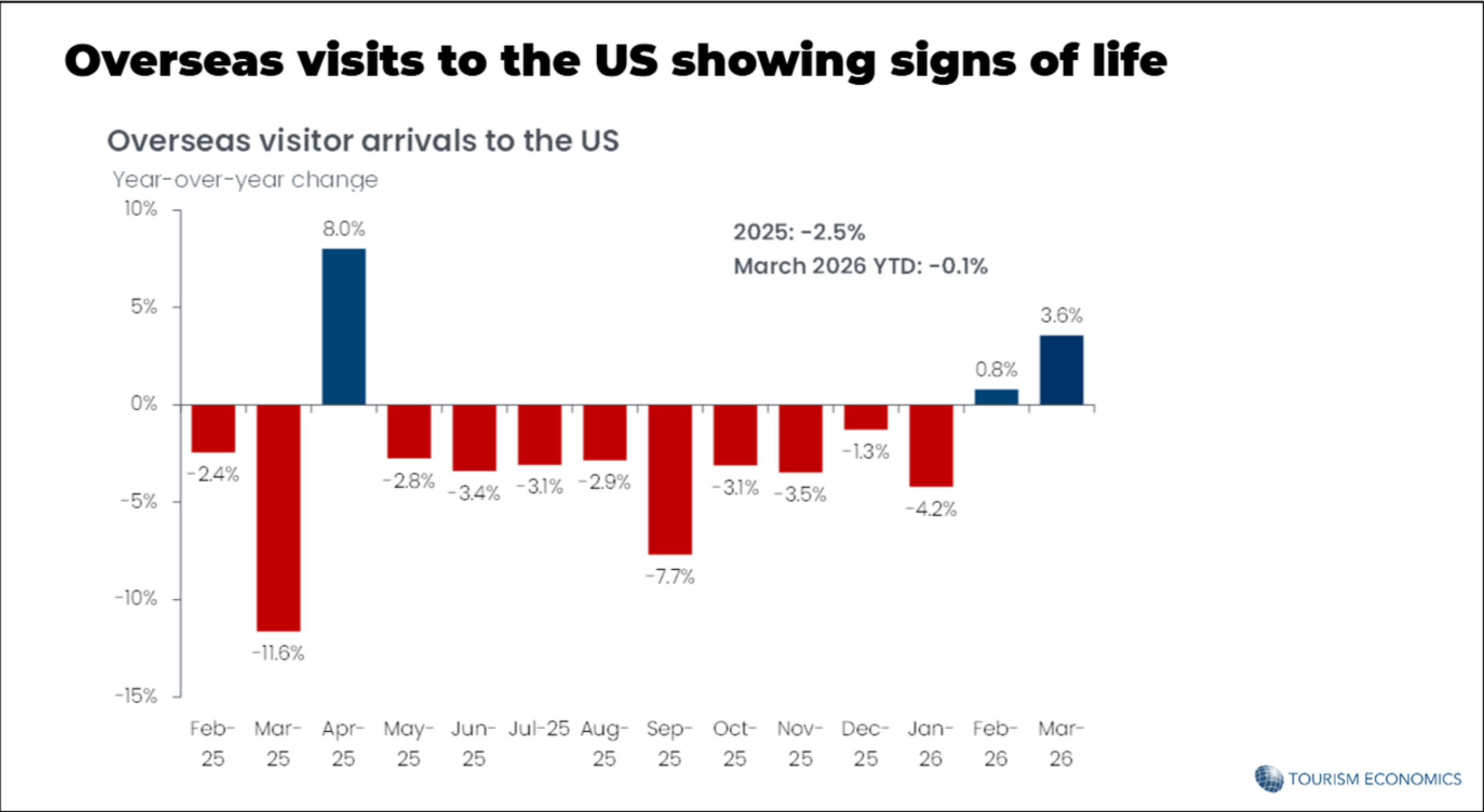
ECONOMIC REVIEW

The National Inflation Rate

- “National Inflation Rate and the Consumer Price Index (CPI) rose dramatically in April for the second consecutive month.”
- “Prices increased 0.9% in April from March and the national inflation rate reached 3.8%, the highest since September 2023.”
- “The consecutive 0.9% monthly increases in March and April represent the largest two-month increase since 2022.”

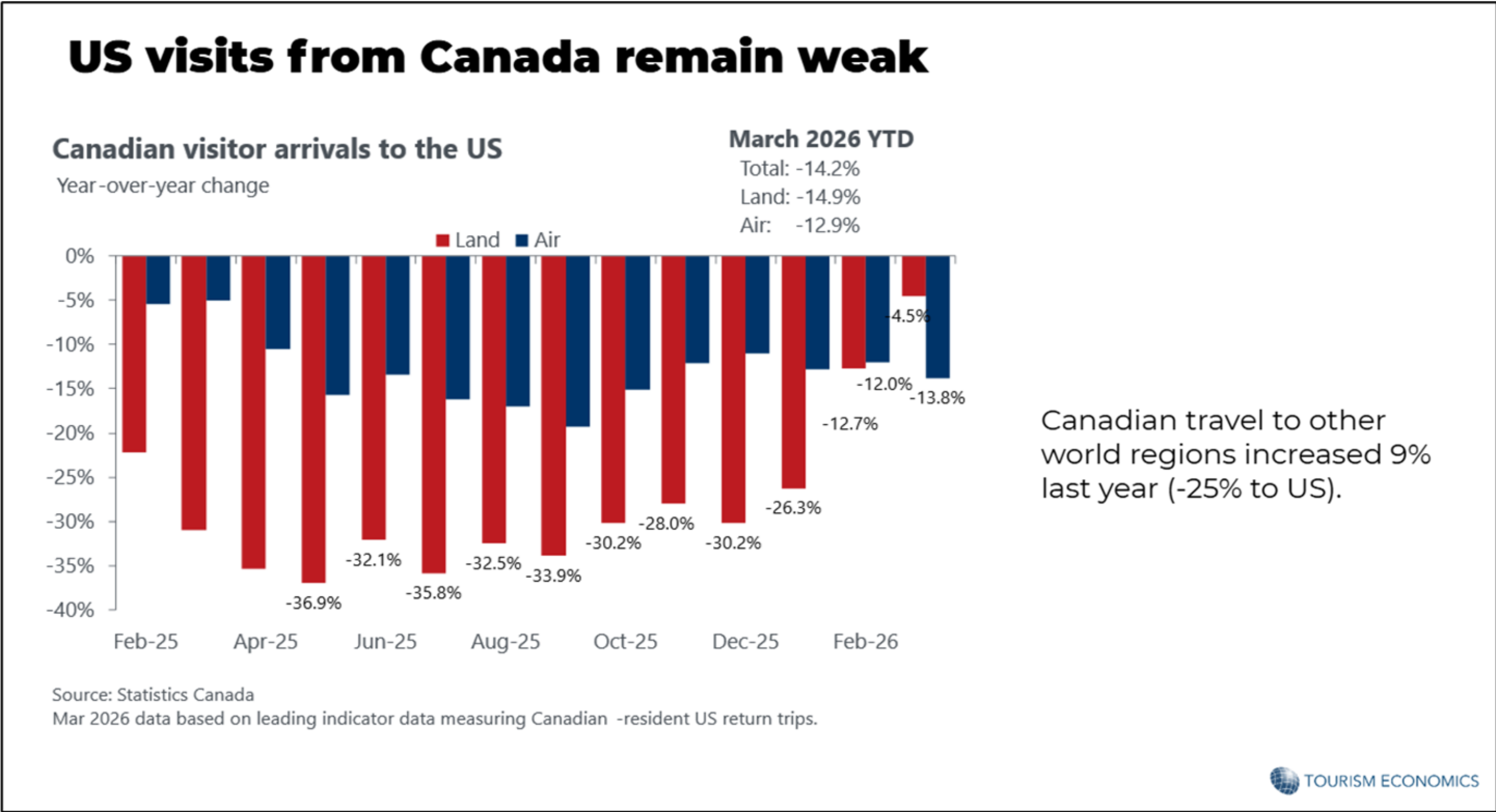


OVERSEAS* VISITOR ARRIVALS

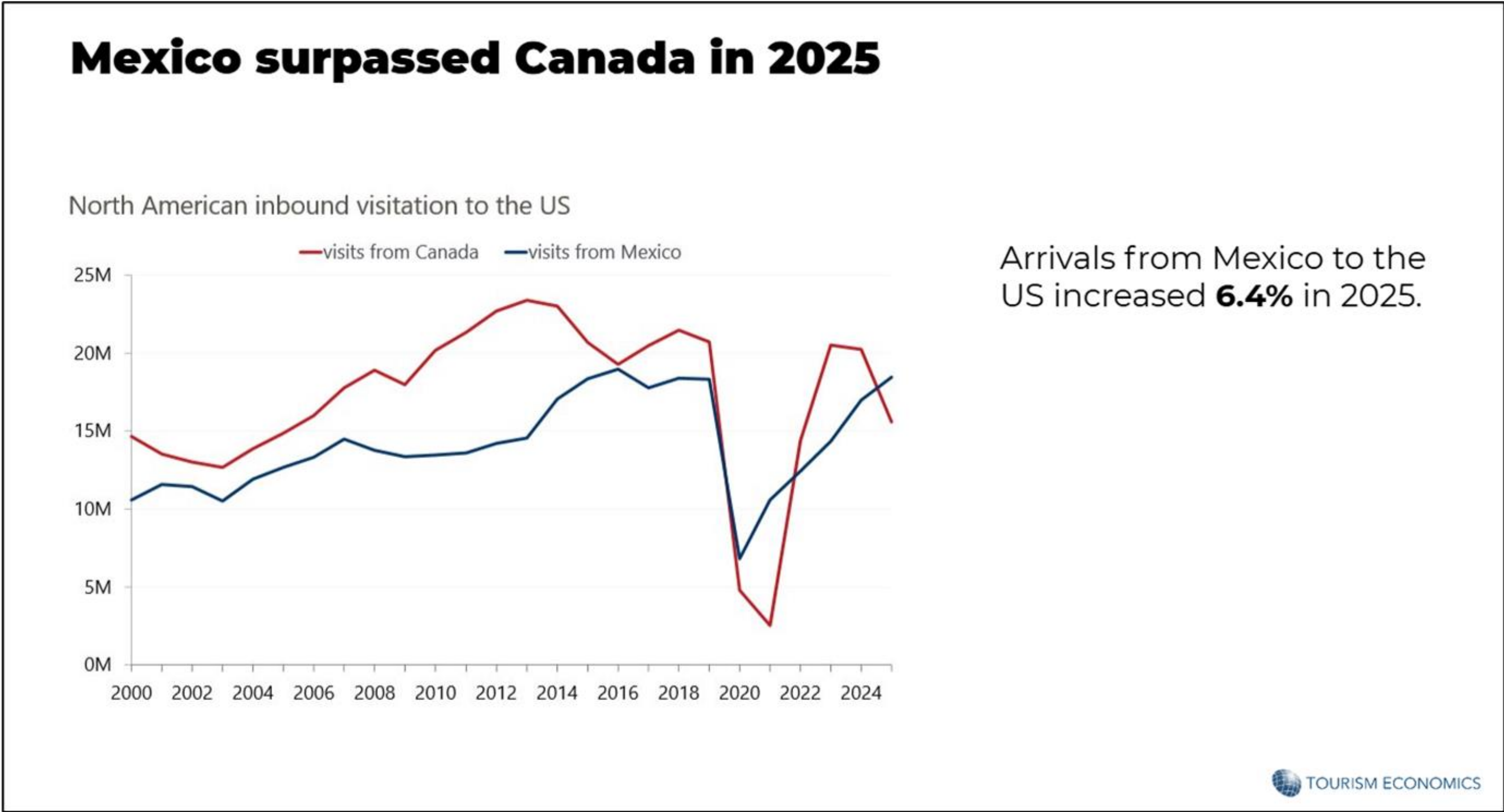


*Overseas visitors include all international markets except for Canada and Mexico

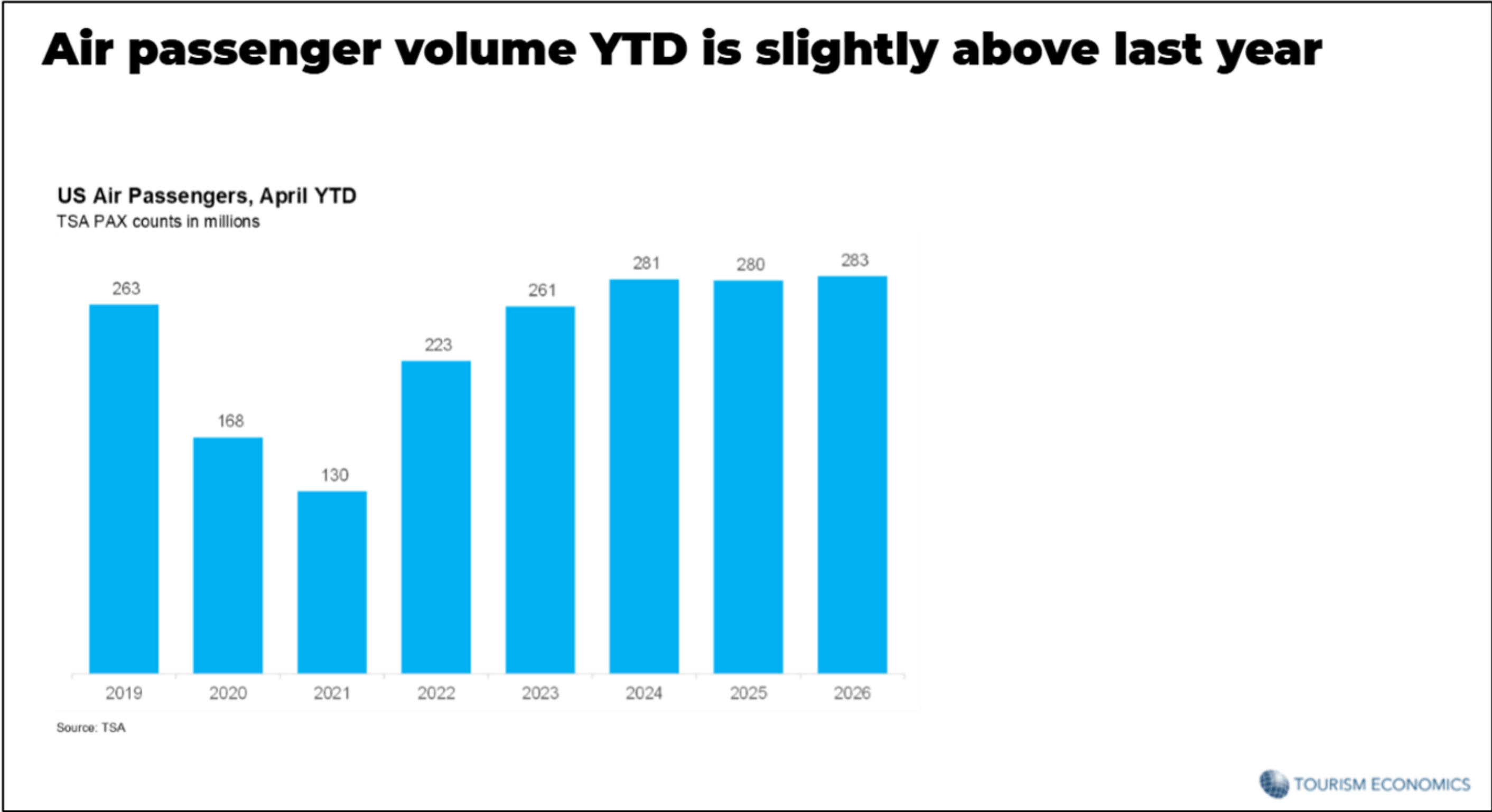
CANADA INBOUND REVIEW



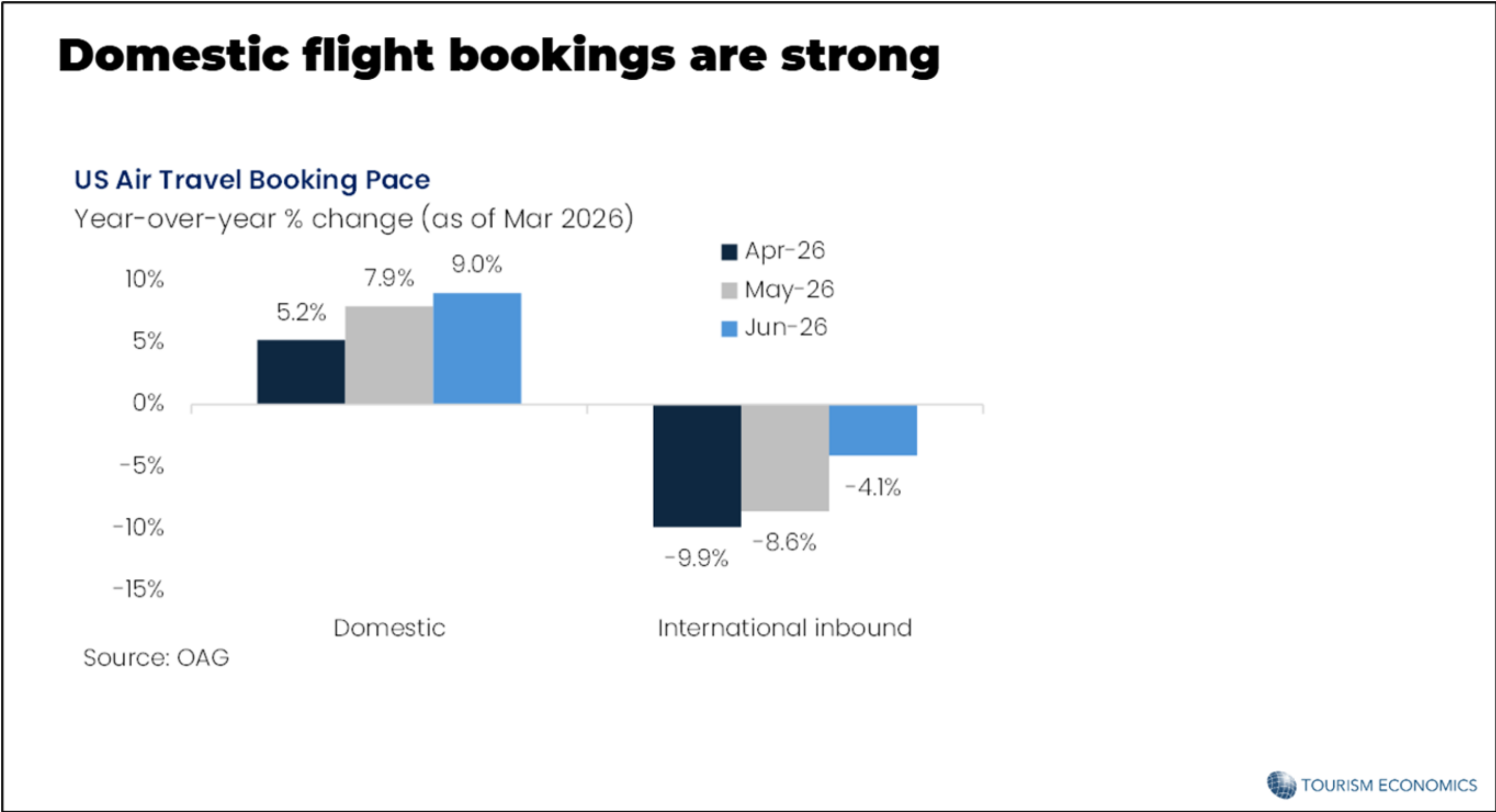
MEXICO VS. CANADA INBOUND VISITATION



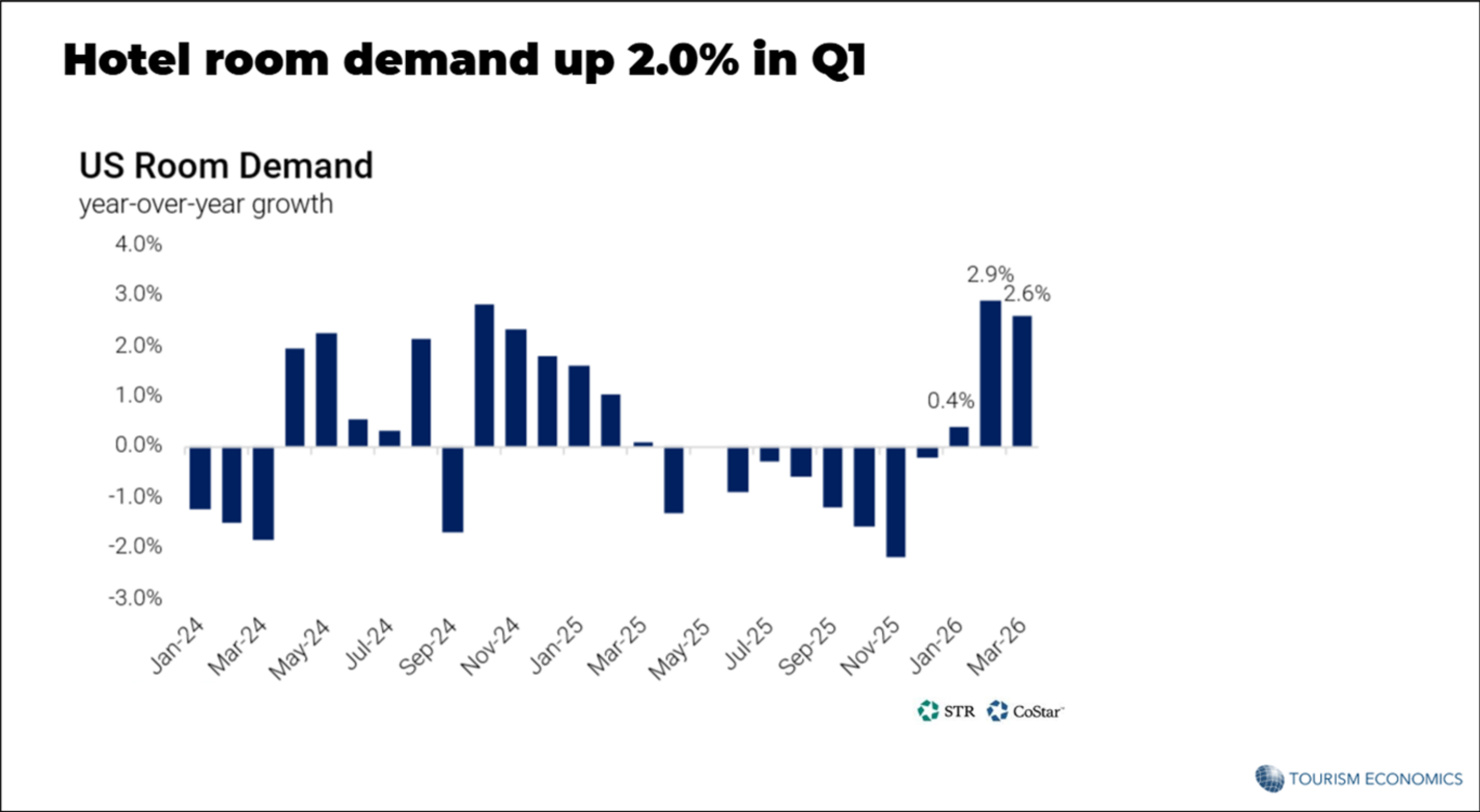
DOMESTIC AIR TRAVEL



U.S. AIR TRAVEL BOOKING PACE

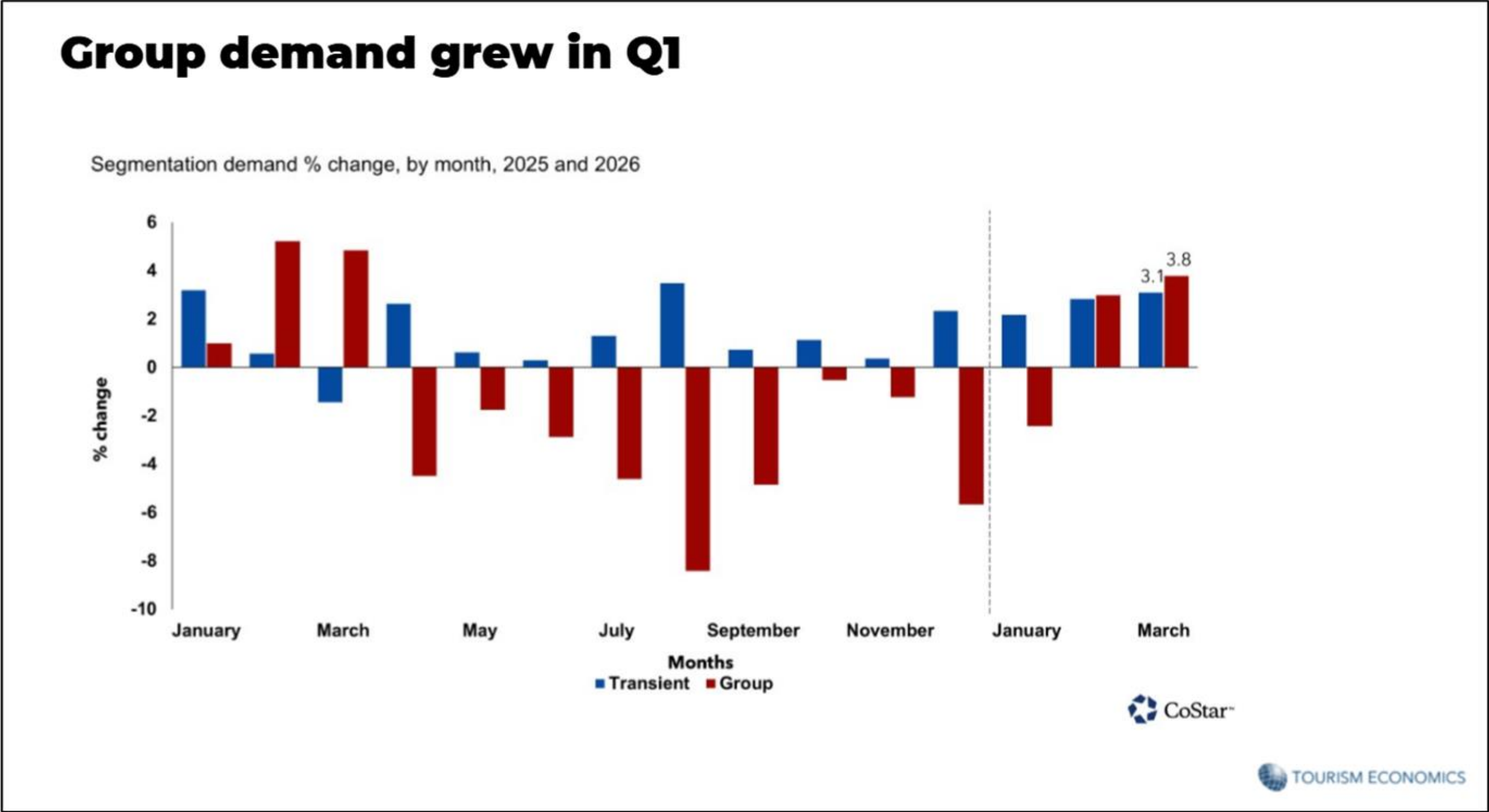


U.S. HOTEL ROOM DEMAND



Source: STR & Tourism Economics (May 2026)

U.S. HOTEL GROUP DEMAND

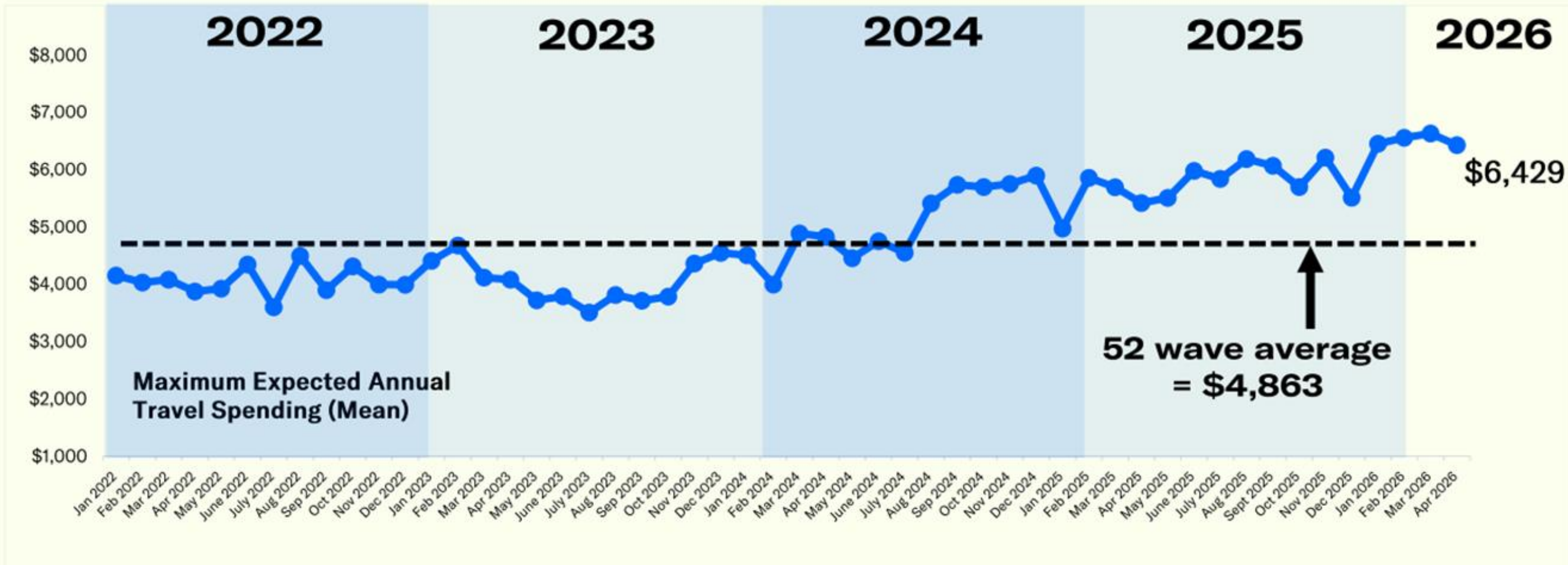


Source: STR & Tourism Economics (May 2026)

U.S. TRAVEL BUDGETS

Americans Continue to Have High Expectations for Travel Spending

Question: How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT 12 MONTHS? Maximum I would spend on leisure travel (next 12 months):



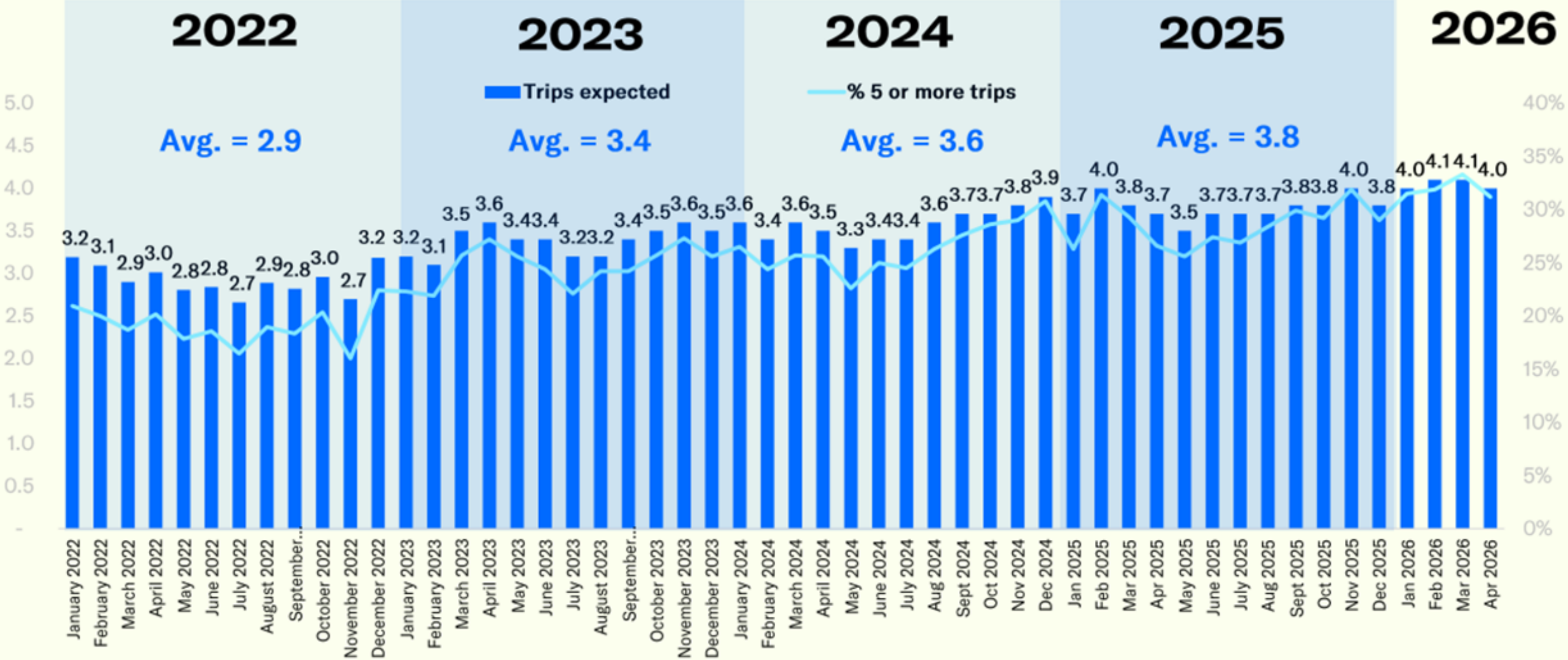
Future Partners The State of the American Traveler, May 2026

Base: All respondents, approx. 4,000 completed surveys per wave

FUTURE TRIP EXPECTATIONS

Trip Expectations Start the Year at 4.0+ for All Four Months — A Post-Pandemic First

Question: IN TOTAL, how many leisure trips (of 50 miles or more from your home) do you expect to take in next 12 months?



Future Partners The State of the American Traveler, May 2026

Base: All respondents, approx. 4,000 completed surveys per wave

U.S. SHORT TERM RENTALS REVIEW

Short Term Rentals Update April 2026

- “Supply growth accelerated again in April as the U.S. short-term rental market continued its gradual recovery from the softer demand environment seen through much of late 2025. While occupancy remained relatively flat, stronger ADR growth and improving booking trends point to resilient traveler demand heading into the summer season.”
- “At the same time, the upcoming FIFA World Cup is already beginning to reshape travel patterns across the country. Demand growth is accelerating not only in host cities but also in surrounding regional markets, as travelers increasingly look beyond traditional urban destinations for more affordable accommodation options. Combined with steady spring travel demand and improving summer pacing, the data suggests a stronger seasonal outlook despite continued economic uncertainty.”
- “The April data points to a market where improving demand and strong pricing continue to support revenue growth, even as accelerating supply keeps occupancy gains relatively muted heading into the summer season.”

U.S. SHORT TERM RENTALS REVIEW

Short Term Rentals Update April 2026 (continued)

Key U.S. Short Term Rental Performance Metrics for April 2026

- Available listings (Supply) reached 1.72 million, a 3.5% increase Year-over-Year (YoY)
- Demand nights were up 2.4% YoY
- Occupancy averaged 54.6%, down 0.3% YoY
- Average Daily Rate (ADR) climbed to \$254.13, up 4.5% from last year
- Revenue per Available Rental Night (RevPAR) increased 4.1% YoY to \$138.83

TRAVELER SENTIMENT



AMERICAN TRAVEL SENTIMENT STUDY (WAVE 107)

*Survey fielded May 5-7, 2026; US National Sample of 1,000 adults 18+

American Travel Sentiment Wave 107 Highlights

Key Findings:

- 1. Concerns About Gas Prices Continues to Increase**
Concerns about gas prices greatly impacting travel decisions has reached 40%, up 6.3 points from April 2026 (33%) and up 19.0 points since March 2026 (21%). However, the percentage of those choosing to travel closer to home (36%) due to gas prices is down 5.0 points from April 2026. Travelers reducing the amount they spend on entertainment and recreation (31%) is also down (3.6 points). 7% of travelers are canceling their trips, which is similar to April 2026.
- 2. Iran War Still Influencing International Travel Plans**
30% of travelers plan to travel internationally in the next 12 months, down 3.1 points from April 2026. The Iran war continues to impact international travel plans, with 25% indicating they are less likely to travel internationally due to the war. Compared to April 2026, among travelers who indicated the Iran war is influencing their international travel plans, 37% will replace their international trip with a domestic trip, up 5.6 points. One in five (19%) will cancel their international trip.
- 3. Summer Travel Spending More Polarized in 2026**
Summer travel spending intentions are more polarized than last year, with 31% of travelers saying they plan to spend more (up 5.9 points) and 28% of travelers spending less (up 5.2 points), while 42% plan to spend about the same (down 11.1 points).

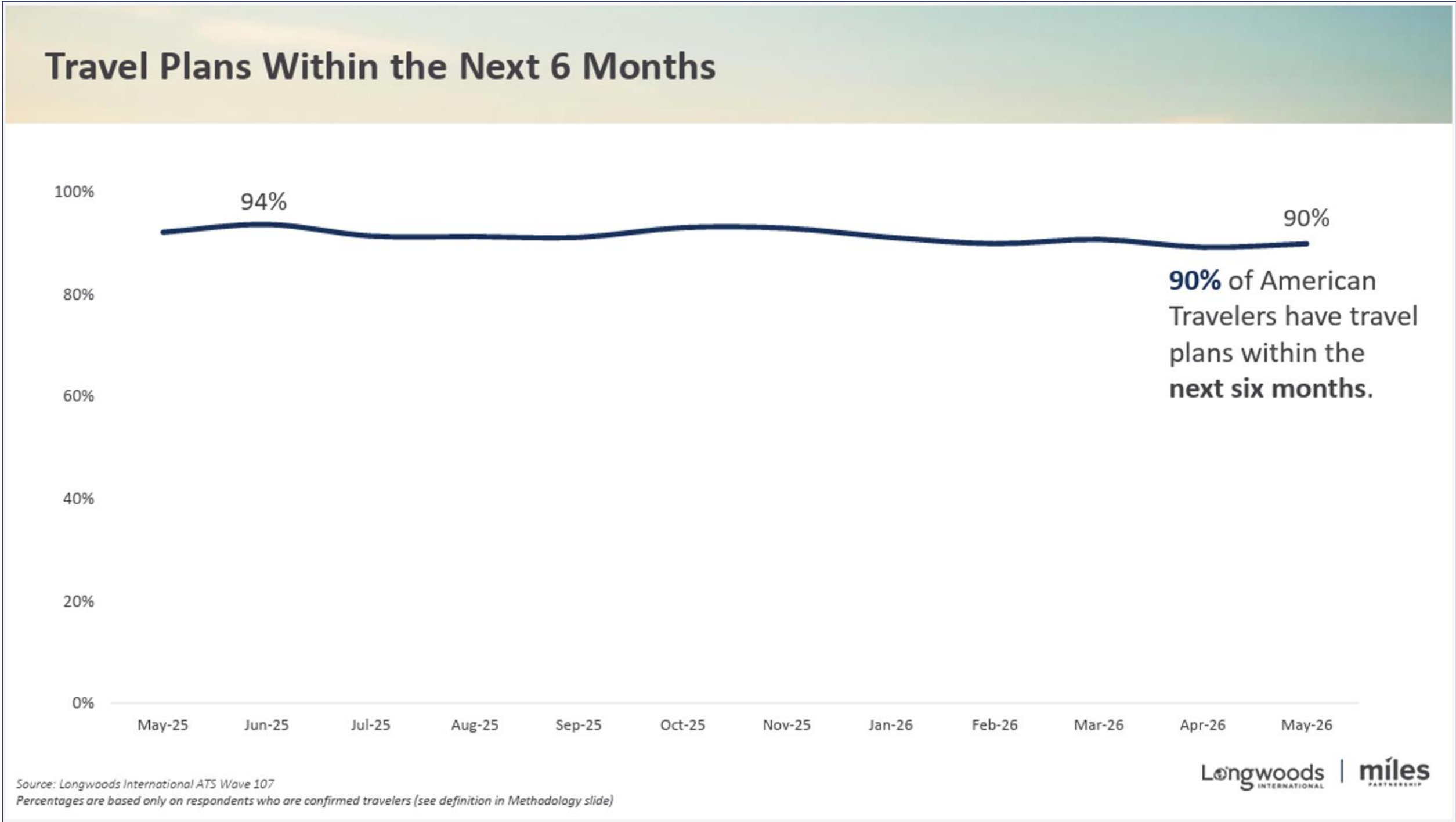


Source: Longwoods International ATS Wave 107

Longwoods | miles
INTERNATIONAL PARTNERSHIP

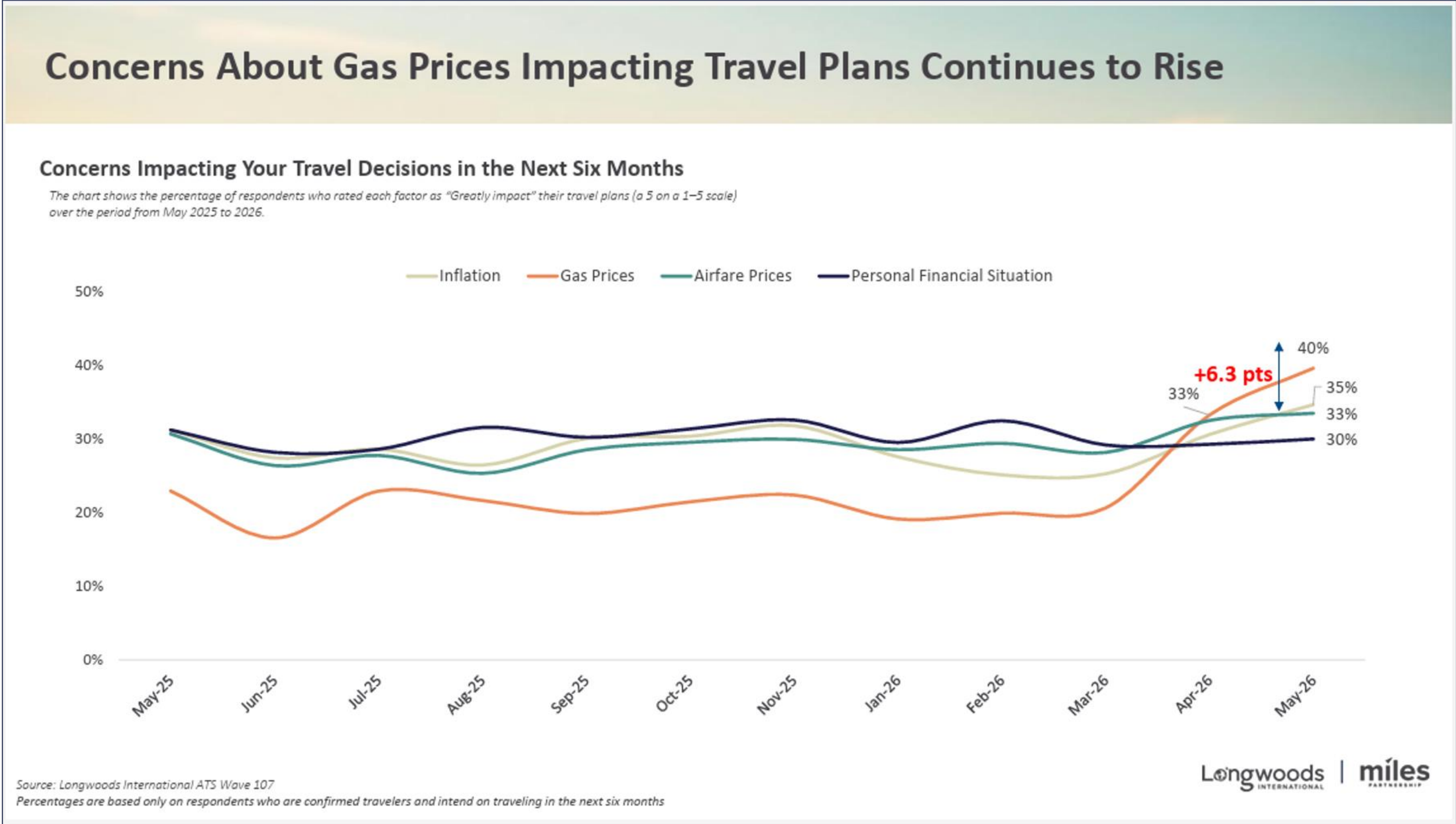
AMERICAN TRAVEL SENTIMENT STUDY (WAVE 107)

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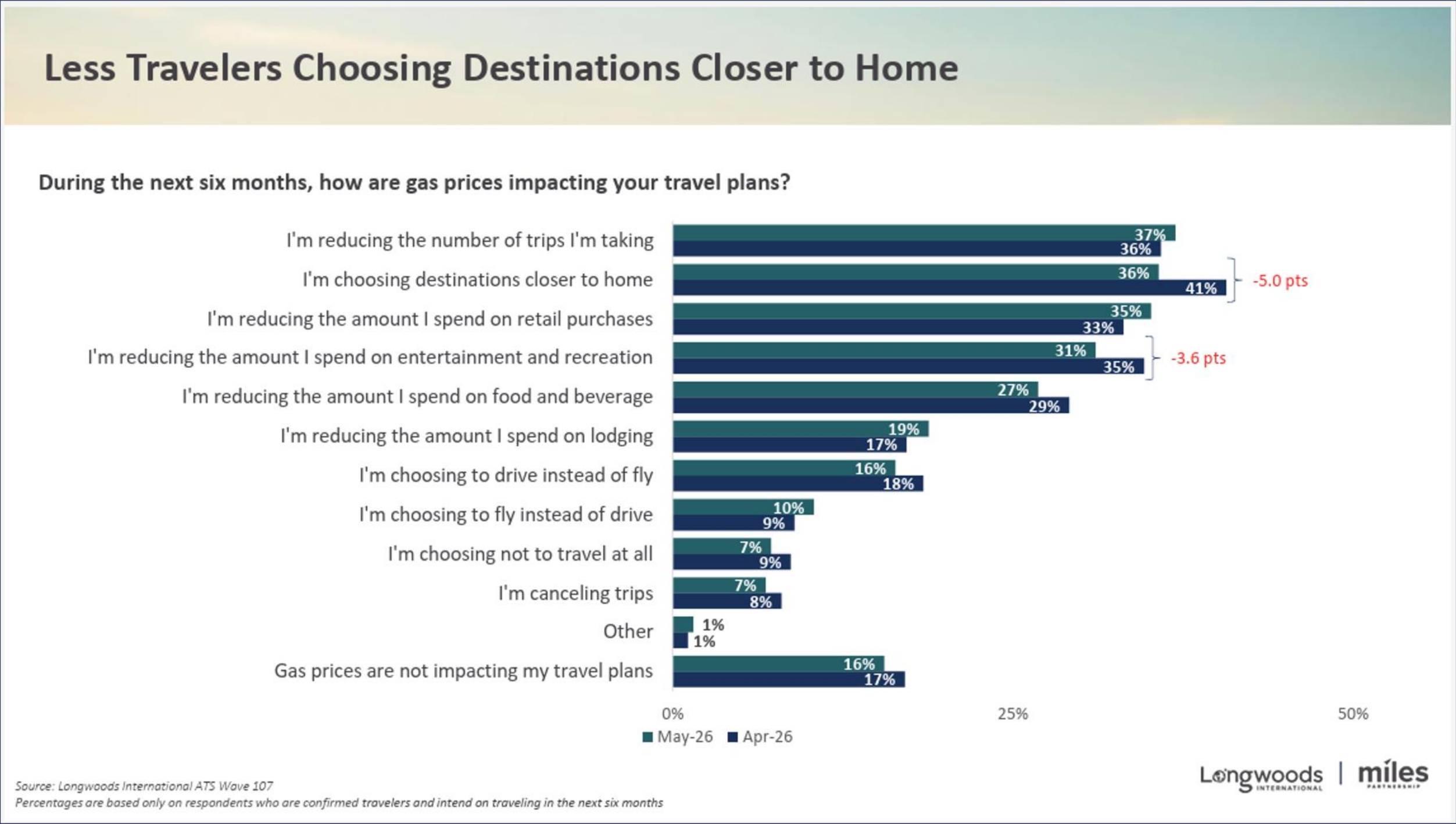
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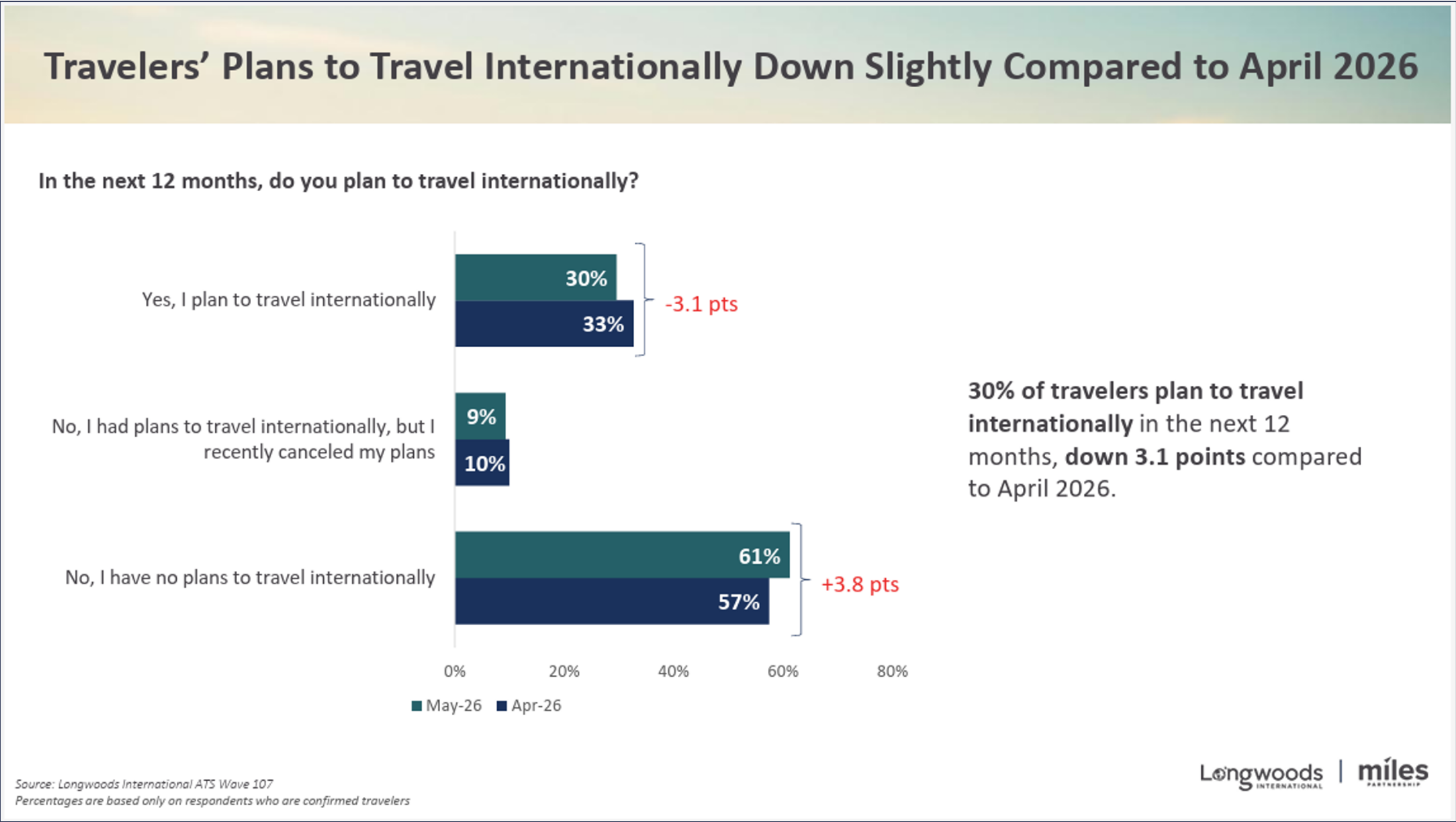
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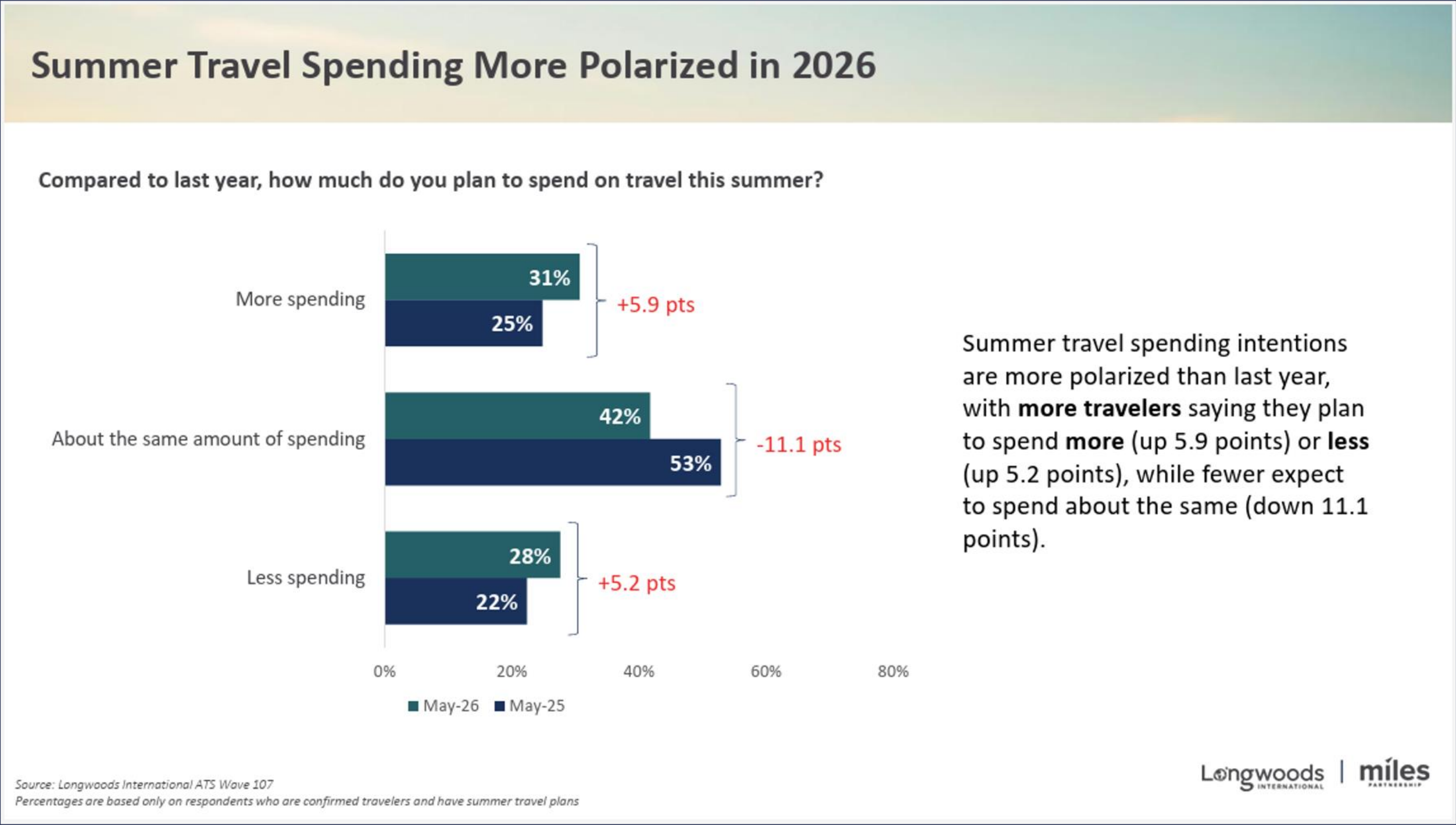
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American Travel Sentiment Methodology

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: May 5 – 7, 2026
- Sample Size: 1,000 U.S. adults (18+)
- Margin of Error: $\pm 3\%$
- 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.

