

MONTHLY RESEARCH UPDATE

October 2025 Review

 (877) 629-4386

 One Visitors Center Circle, Manteo, NC 27954

 www.outerbanks.org

EXECUTIVE SUMMARY

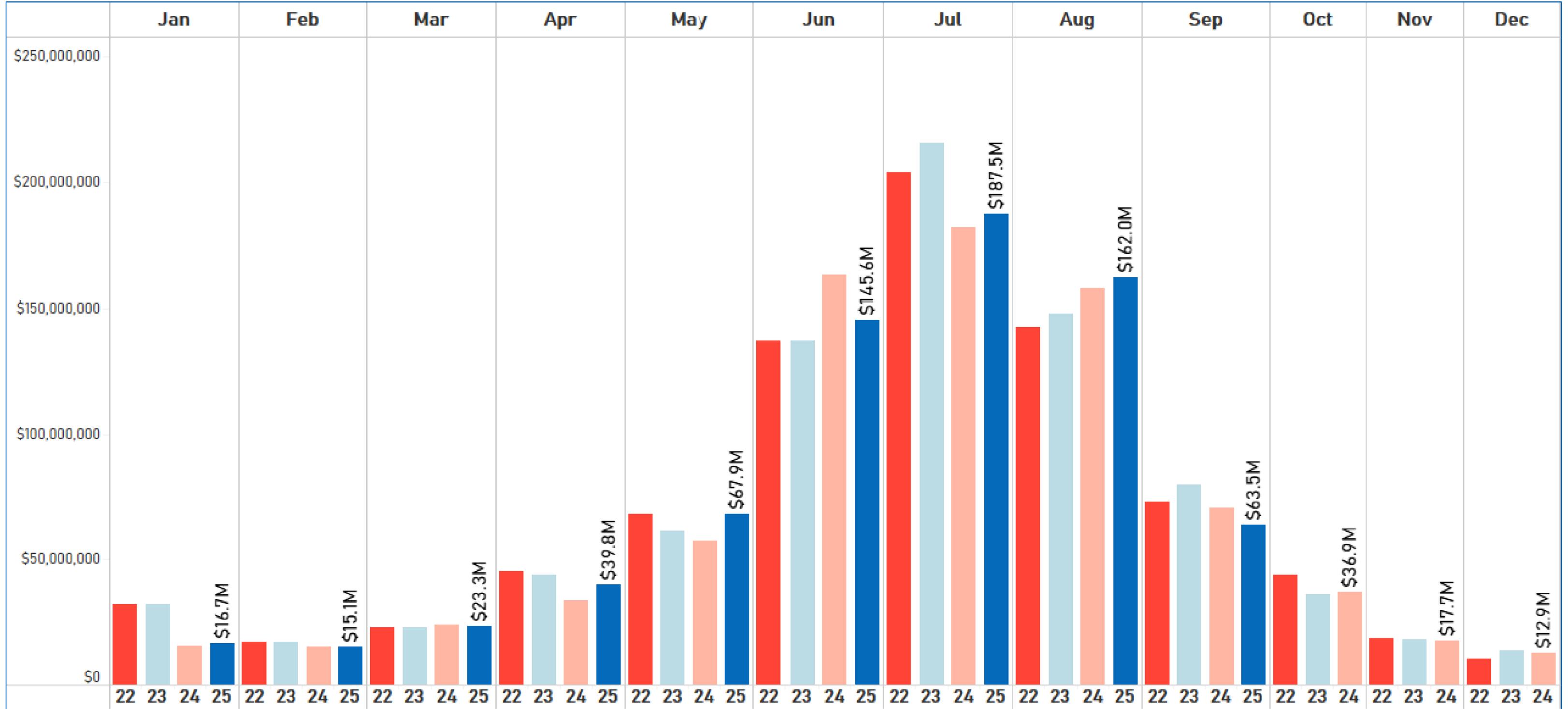
- In October, guest Demand among Dare County's short-term lodging properties continued to trend below last year's volume, falling by 7.1% Year-over-Year (YoY). The number of nights available was relatively flat compared to last year (+0.5%), netting a 7.2% YoY decrease in Occupancy for the month. The adjusted Occupancy came to 52.4% throughout the county in October.
 - Roanoke Island was the only region to see Occupancy increase in October compared to last year. Rentals on Hatteras Island saw the highest average Occupancy at 67.7%, followed by Roanoke Island at 53.5%, and Northern Beaches at 45.5%.
 - Throughout Dare County, Average Daily Rate (ADR) increased slightly, rising by 2.0% YoY to \$222. The Northern Beaches remain the regional leader with an ADR of \$260, followed distantly by Hatteras Island at \$176, and Roanoke Island at \$151.
- Guest Demand among Dare County's hotels also decreased compared to last year in October, falling by 5.9% YoY, pulling Occupancy down by the same rate. Hotels averaged 65.7% Occupancy for the month.
 - ADR increased slightly, however, rising by 1.6% YoY to average \$155 for the month. The slight uptick in rate was not enough to overcome the decline in Demand, however, which resulted in hotel Revenue decreasing by 4.4% YoY to \$2.33 million in October.
- In-market visitor spending on Visa cards totaled \$41.1 million in September 2025, a 2.8% decrease from the same month last year. Calendar Year-To-Date (YTD), visitor spending totals \$371.6 million, up 3.2% YoY.
 - September was a down month for most major domestic markets. Residents from the Virginia Beach region spent 3.1% less, Washington D.C. residents spent 8.9% less, and Richmond residents spent 0.9% less than one year prior. Overall, domestic visitor spending was 2.7% lower in September compared to last year.

TAX COLLECTIONS DATA



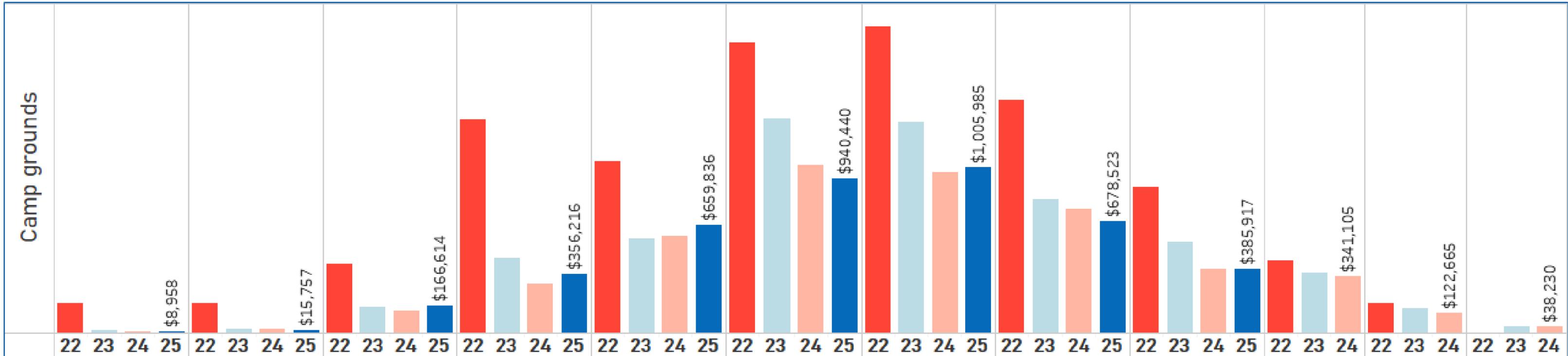
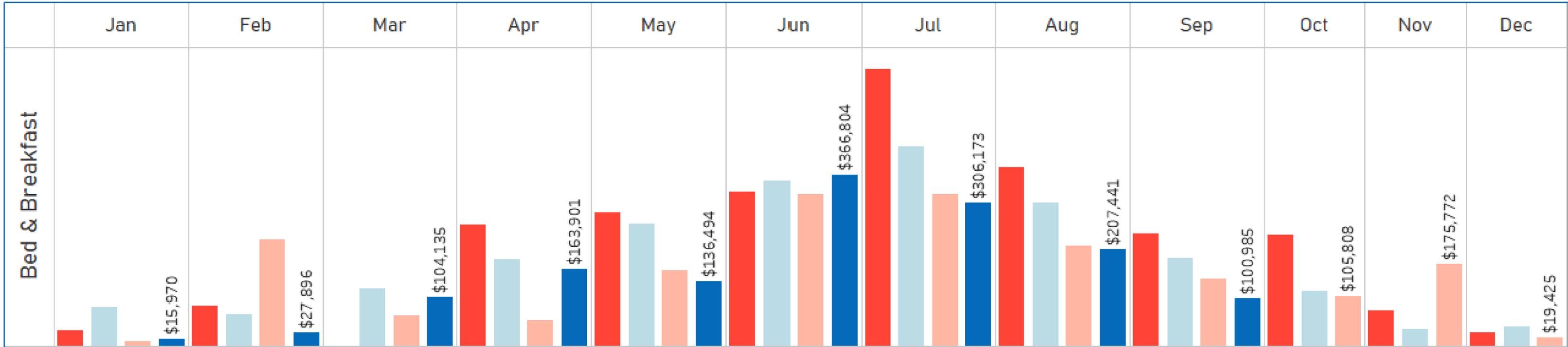
Outer Banks Gross Occupancy Summary Collections Through September 2025

Source: Dare County Tax Office



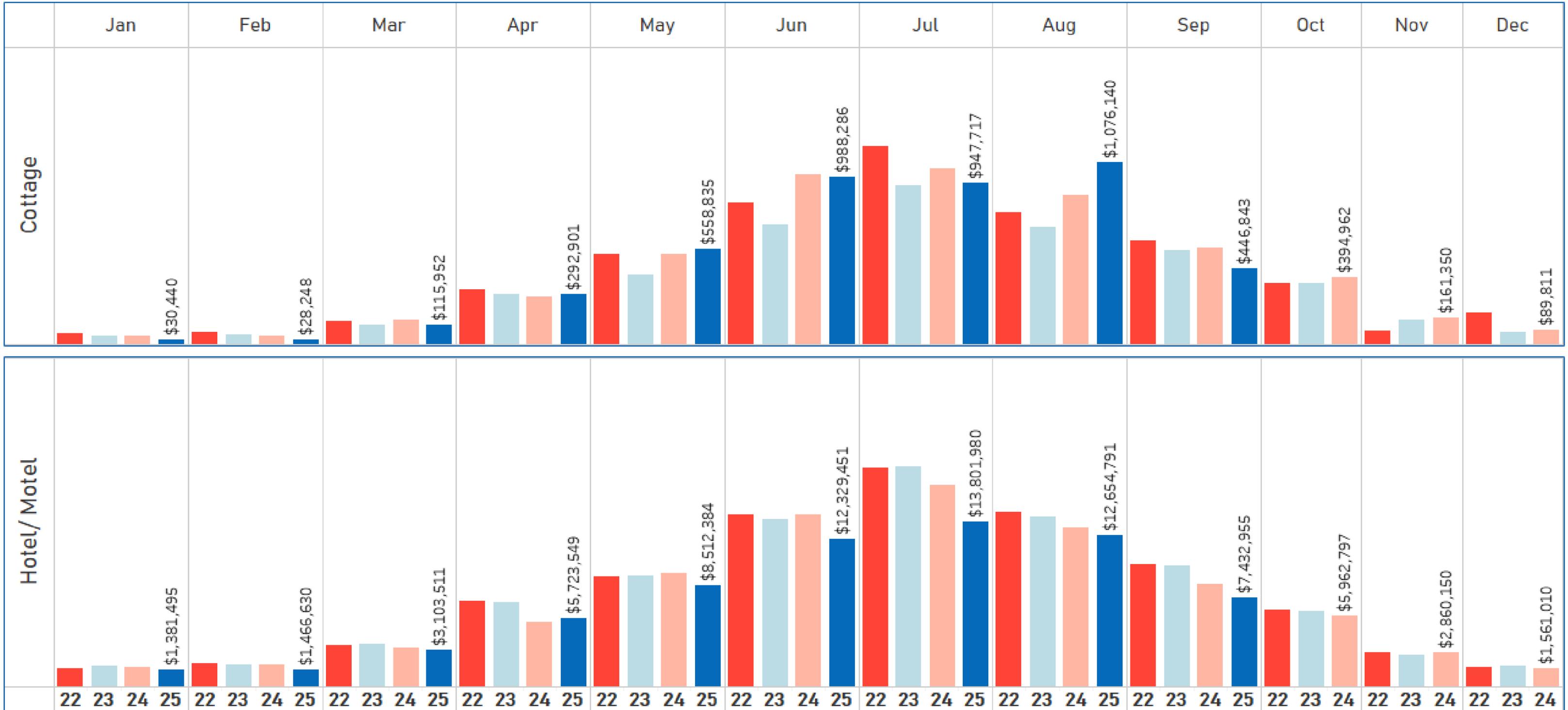
Outer Banks Total Occupancy by Class Collections Through September 2025

Source: Dare County Tax Office



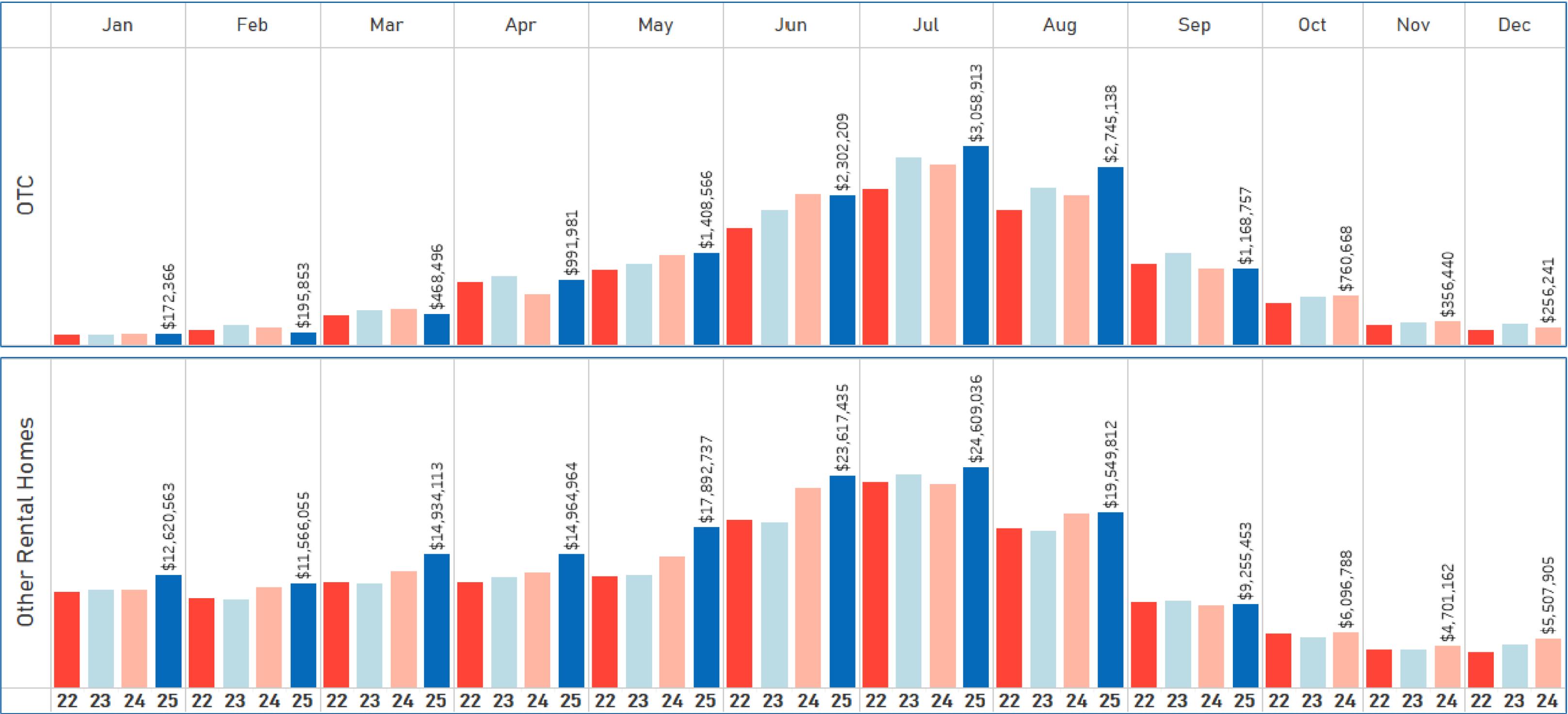
Outer Banks Total Occupancy by Class Collections Through September 2025

Source: Dare County Tax Office



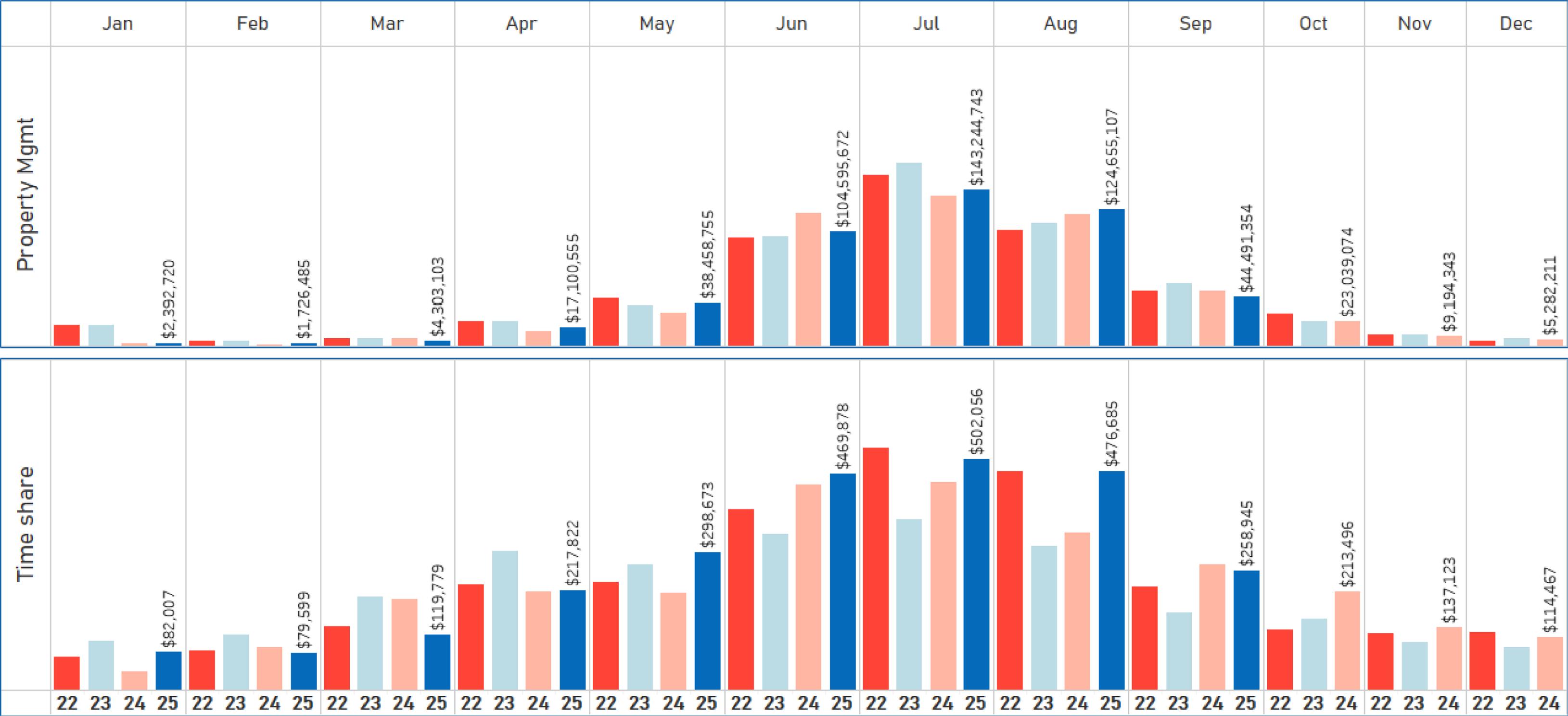
Outer Banks Total Occupancy by Class Collections Through September 2025

Source: Dare County Tax Office



Outer Banks Total Occupancy by Class Collections Through September 2025

Source: Dare County Tax Office

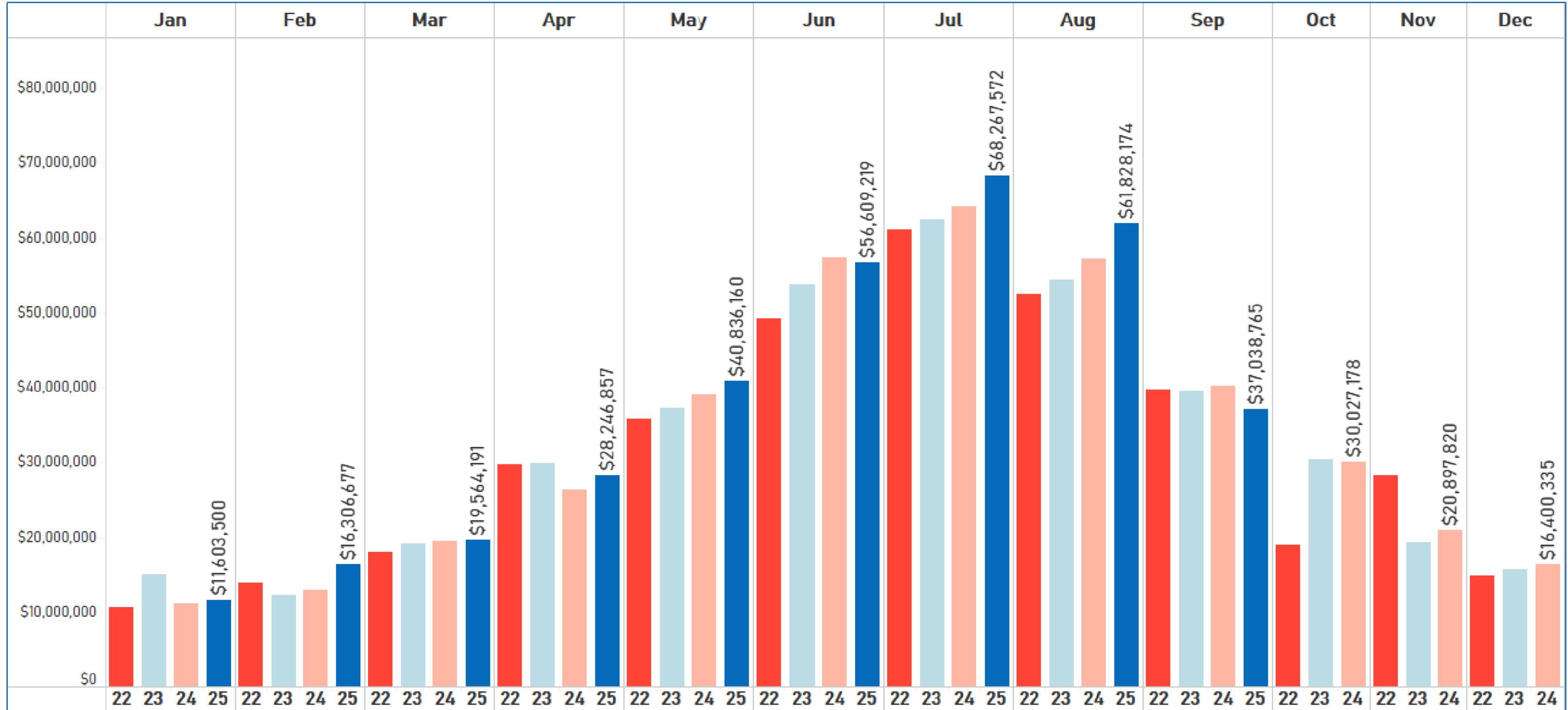


Total Collections by Month													
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Grand Total
2024	\$15,588,394	\$15,256,753	\$23,855,777	\$33,495,901	\$57,369,540	\$162,956,697	\$181,861,471	\$157,867,180	\$70,396,614	\$36,914,698	\$17,709,005	\$12,869,300	\$786,141,330
2025	\$16,704,519	\$15,106,523	\$23,315,703	\$39,811,889	\$67,926,280	\$145,610,175	\$187,476,603	\$162,043,637	\$63,541,209				\$721,536,538

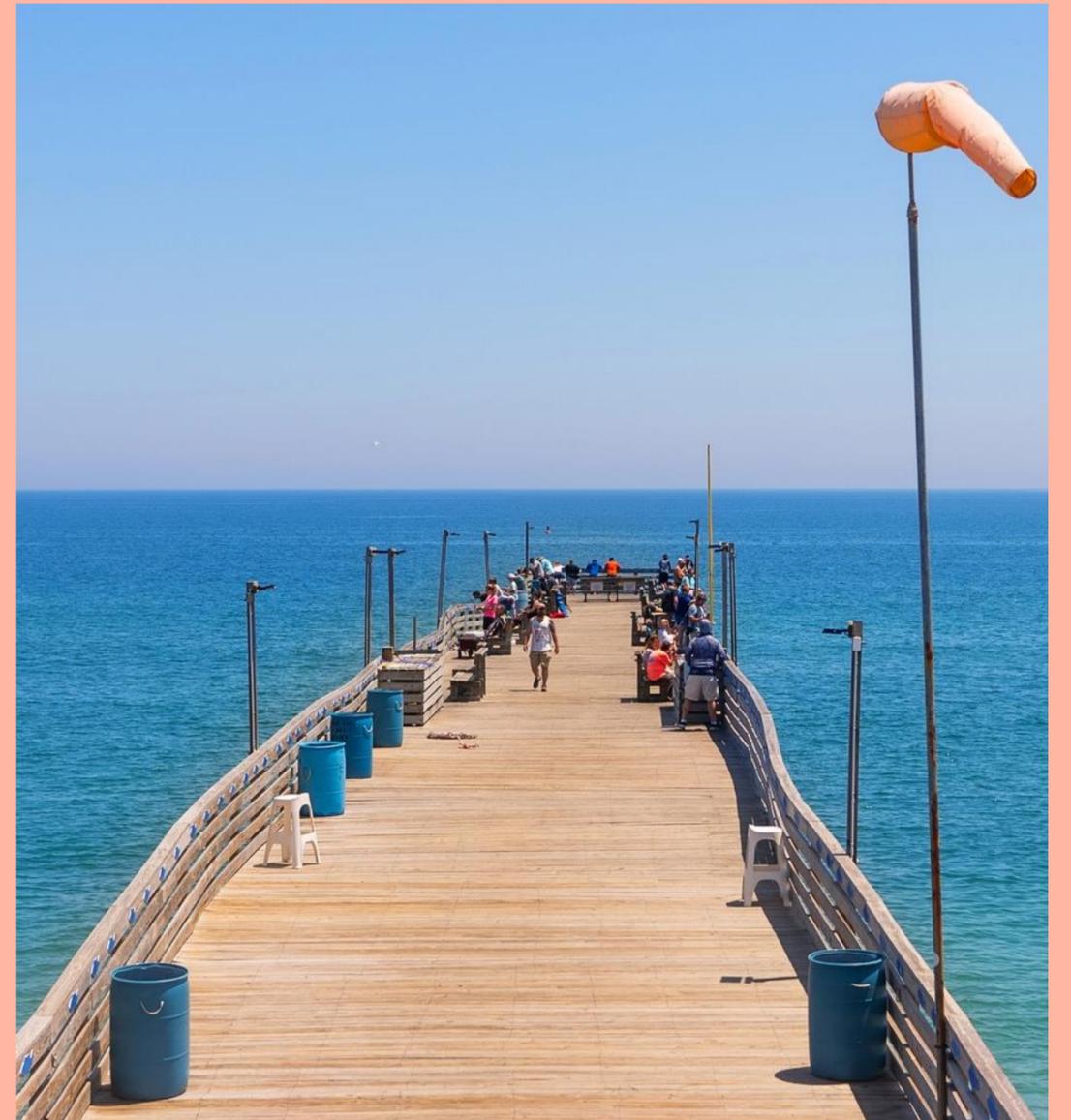
Monthly Collections by Class														
Bed & Breakfast	24	\$10,819	\$227,405	\$65,282	\$55,545	\$160,661	\$326,158	\$325,951	\$215,521	\$141,952	\$105,808	\$175,772	\$19,425	\$1,830,299
	25	\$15,970	\$27,896	\$104,135	\$163,901	\$136,494	\$366,804	\$306,173	\$207,441	\$100,985				\$1,429,799
Camp grounds	24	\$6,337	\$19,282	\$135,076	\$296,019	\$587,641	\$1,018,049	\$974,783	\$756,020	\$387,638	\$341,105	\$122,665	\$38,230	\$4,682,845
	25	\$8,958	\$15,757	\$166,614	\$356,216	\$659,836	\$940,440	\$1,005,985	\$678,523	\$385,917				\$4,218,246
Cottage	24	\$49,099	\$51,908	\$143,712	\$279,005	\$532,707	\$1,003,815	\$1,035,089	\$878,291	\$569,120	\$394,962	\$161,350	\$89,811	\$5,188,869
	25	\$30,440	\$28,248	\$115,952	\$292,901	\$558,835	\$988,286	\$947,717	\$1,076,140	\$446,843				\$4,485,362
Hotel/Motel	24	\$1,611,583	\$1,790,154	\$3,233,707	\$5,376,167	\$9,486,205	\$14,339,858	\$16,826,973	\$13,221,625	\$8,530,107	\$5,962,797	\$2,860,150	\$1,561,010	\$84,800,336
	25	\$1,381,495	\$1,466,630	\$3,103,511	\$5,723,549	\$8,512,384	\$12,329,451	\$13,801,980	\$12,654,791	\$7,432,955				\$66,406,746
OTC	24	\$175,273	\$263,344	\$552,764	\$768,762	\$1,370,448	\$2,317,315	\$2,786,075	\$2,309,637	\$1,168,599	\$760,668	\$356,440	\$256,241	\$13,085,566
	25	\$172,366	\$195,853	\$468,496	\$991,981	\$1,408,566	\$2,302,209	\$3,058,913	\$2,745,138	\$1,168,757				\$12,512,279
Other Rental Homes	24	\$10,903,039	\$11,277,328	\$12,948,689	\$12,894,732	\$14,583,119	\$22,241,837	\$22,754,381	\$19,451,549	\$9,129,130	\$6,096,788	\$4,701,162	\$5,507,905	\$152,489,659
	25	\$12,620,563	\$11,566,055	\$14,934,113	\$14,964,964	\$17,892,737	\$23,617,435	\$24,609,036	\$19,549,812	\$9,255,453				\$149,010,168
Property Mgmt	24	\$2,791,225	\$1,533,441	\$6,578,087	\$13,611,220	\$30,438,706	\$121,263,036	\$136,706,621	\$120,692,022	\$50,197,006	\$23,039,074	\$9,194,343	\$5,282,211	\$521,326,992
	25	\$2,392,720	\$1,726,485	\$4,303,103	\$17,100,555	\$38,458,755	\$104,595,672	\$143,244,743	\$124,655,107	\$44,491,354				\$480,968,494
Time share	24	\$41,019	\$93,891	\$198,460	\$214,451	\$210,053	\$446,629	\$451,598	\$342,515	\$273,063	\$213,496	\$137,123	\$114,467	\$2,736,765
	25	\$82,007	\$79,599	\$119,779	\$217,822	\$298,673	\$469,878	\$502,056	\$476,685	\$258,945				\$2,505,444

Outer Banks Total Gross Meals Summary Collections Through September 2025

Source: Dare County Tax Office

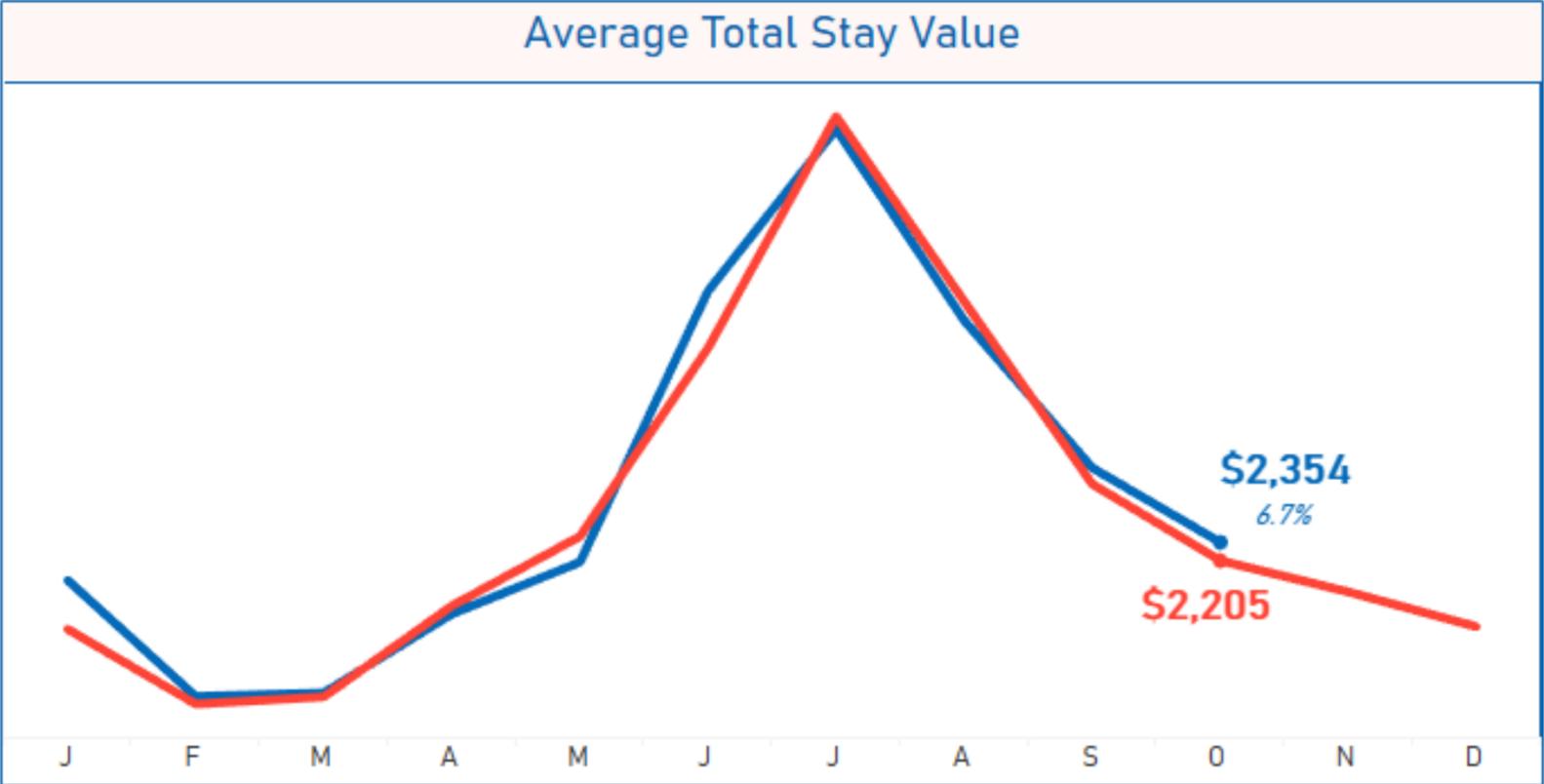
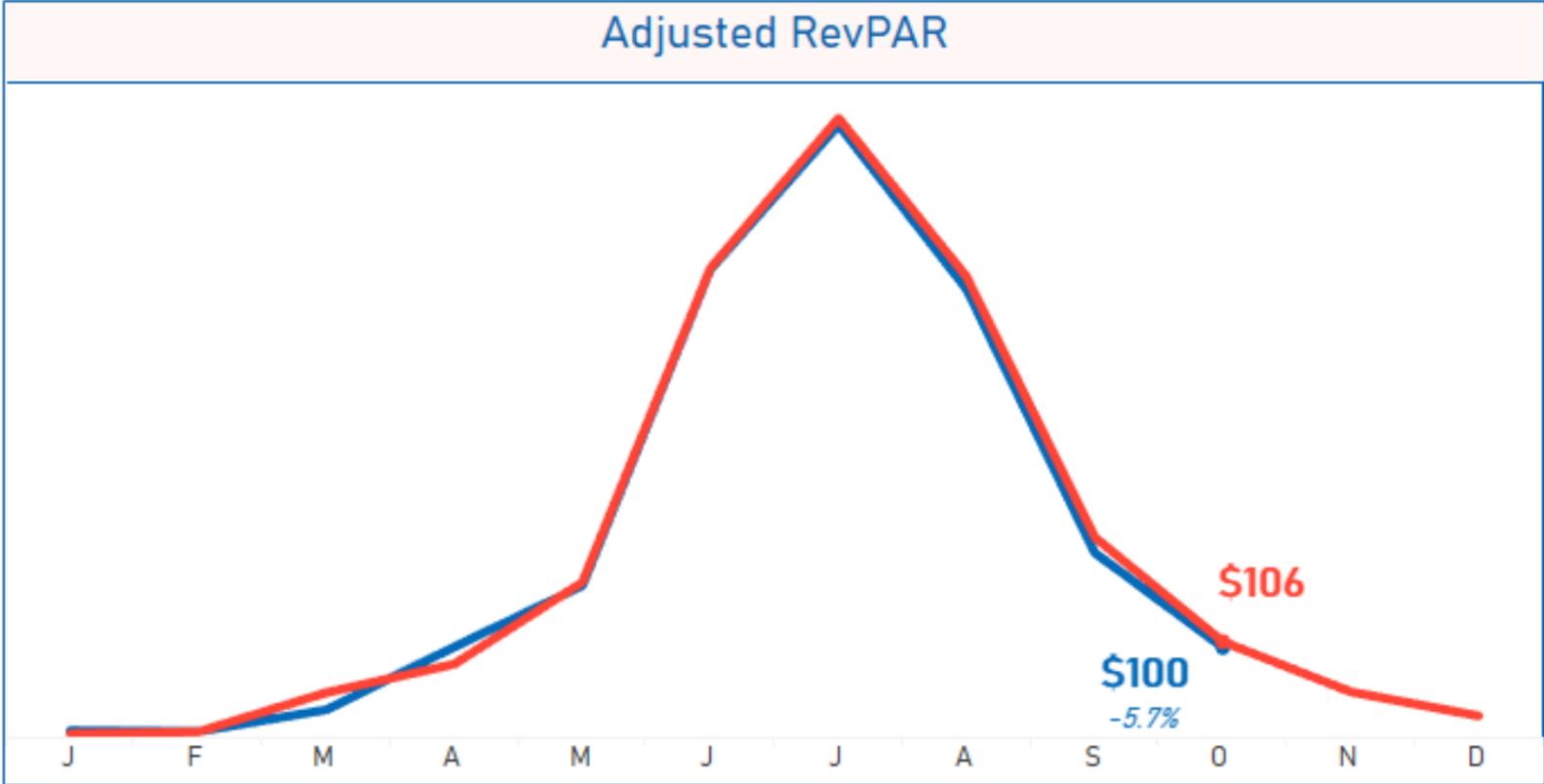
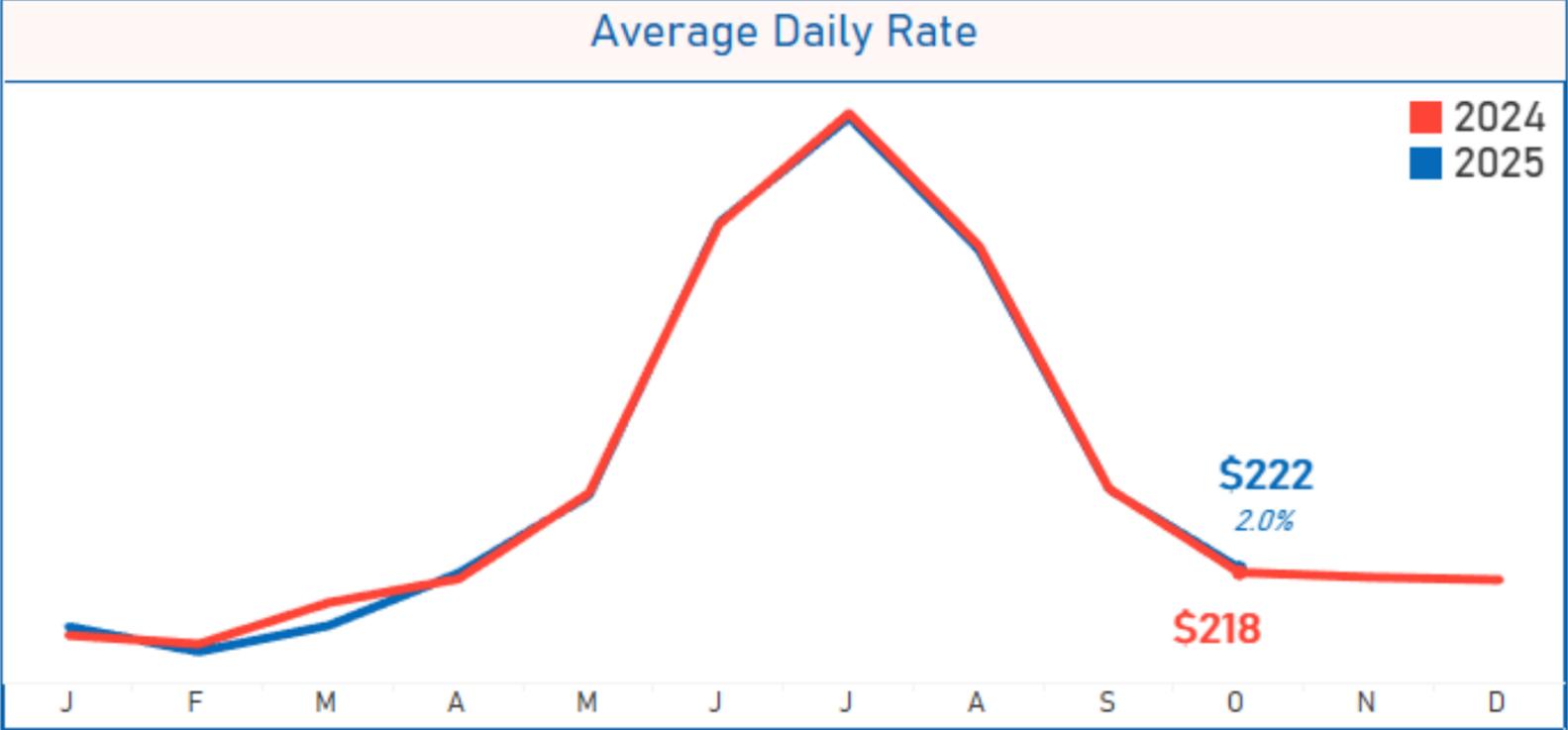
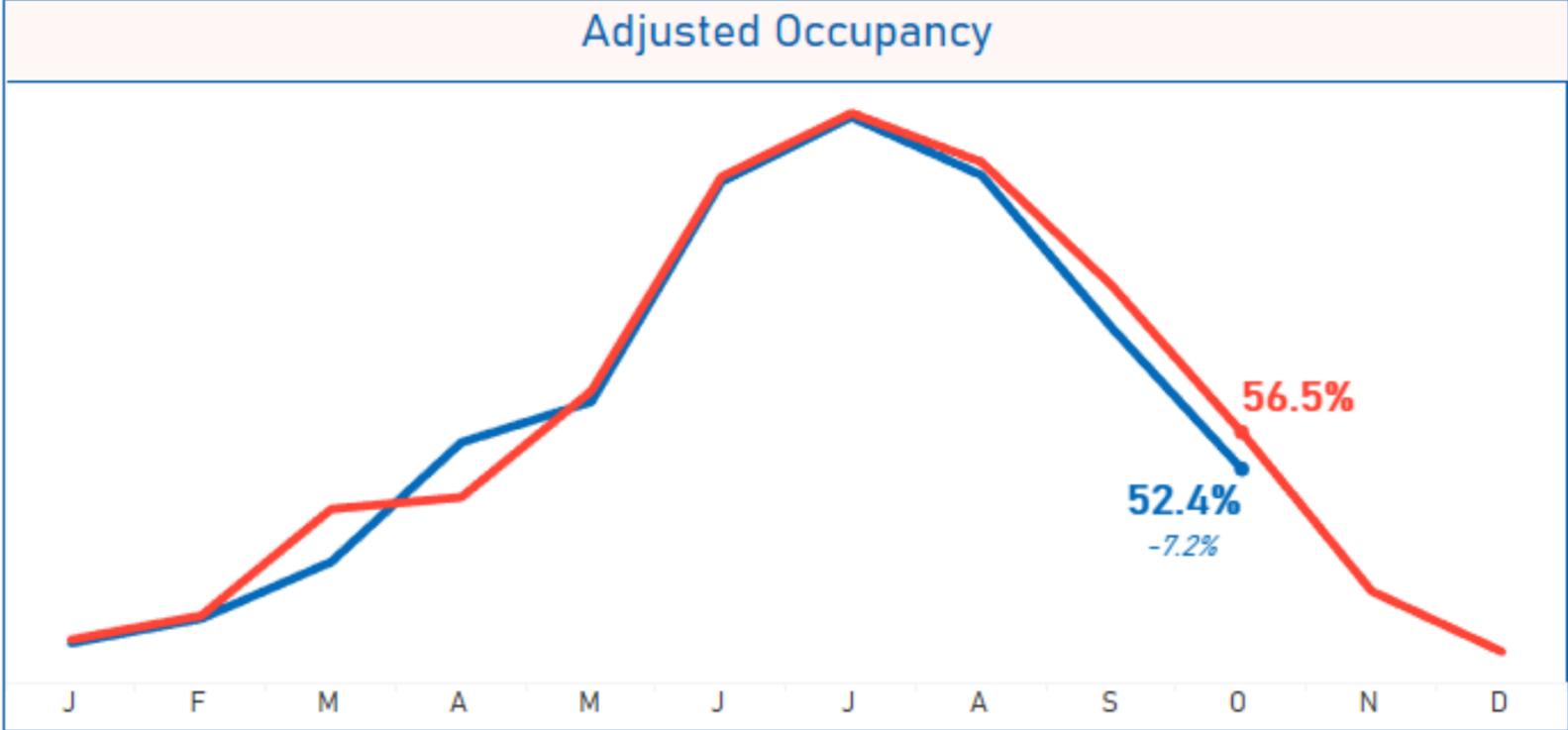


HISTORICAL SHORT-TERM RENTAL DATA



Dare County Monthly Short-Term Rental Performance October 2025

Source: KeyData

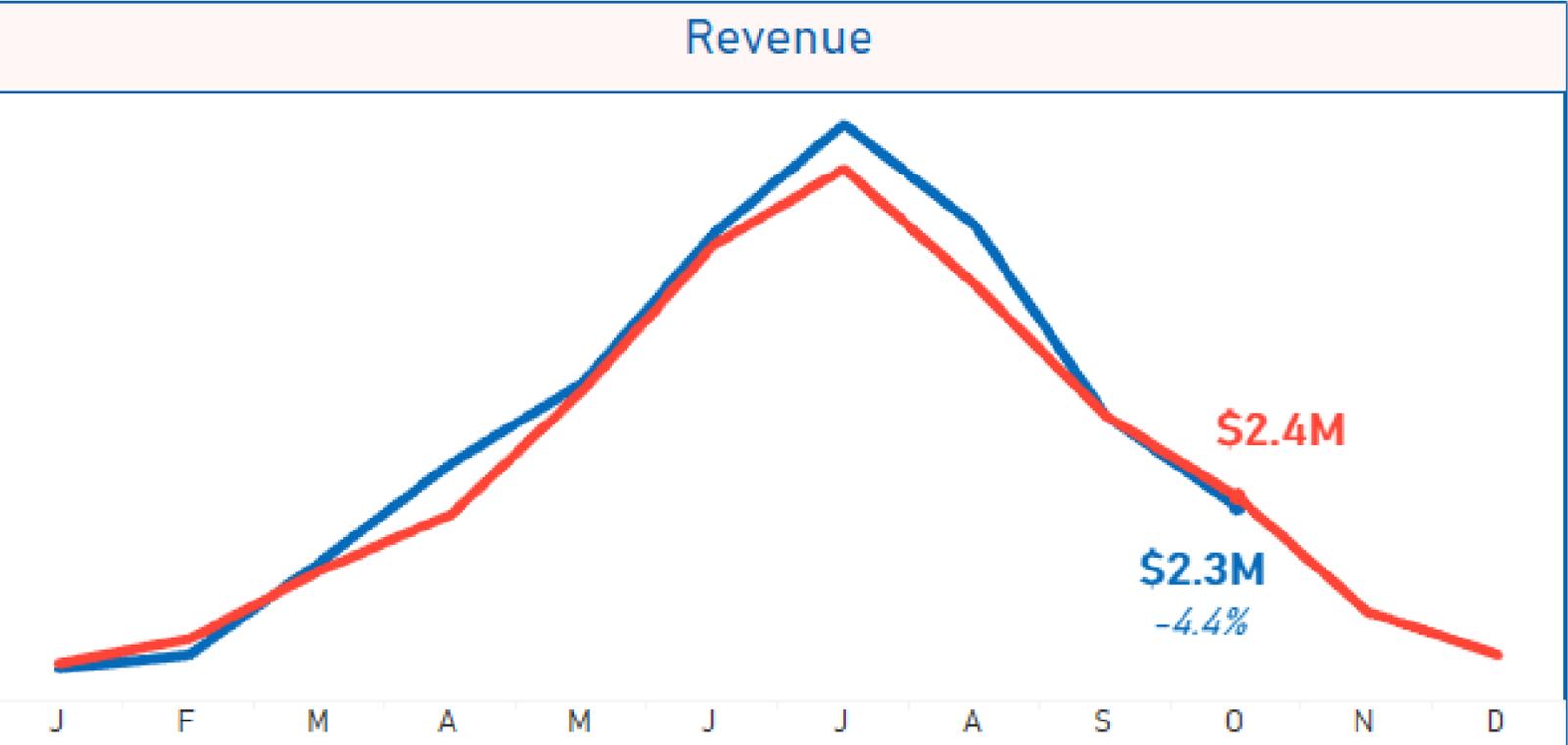
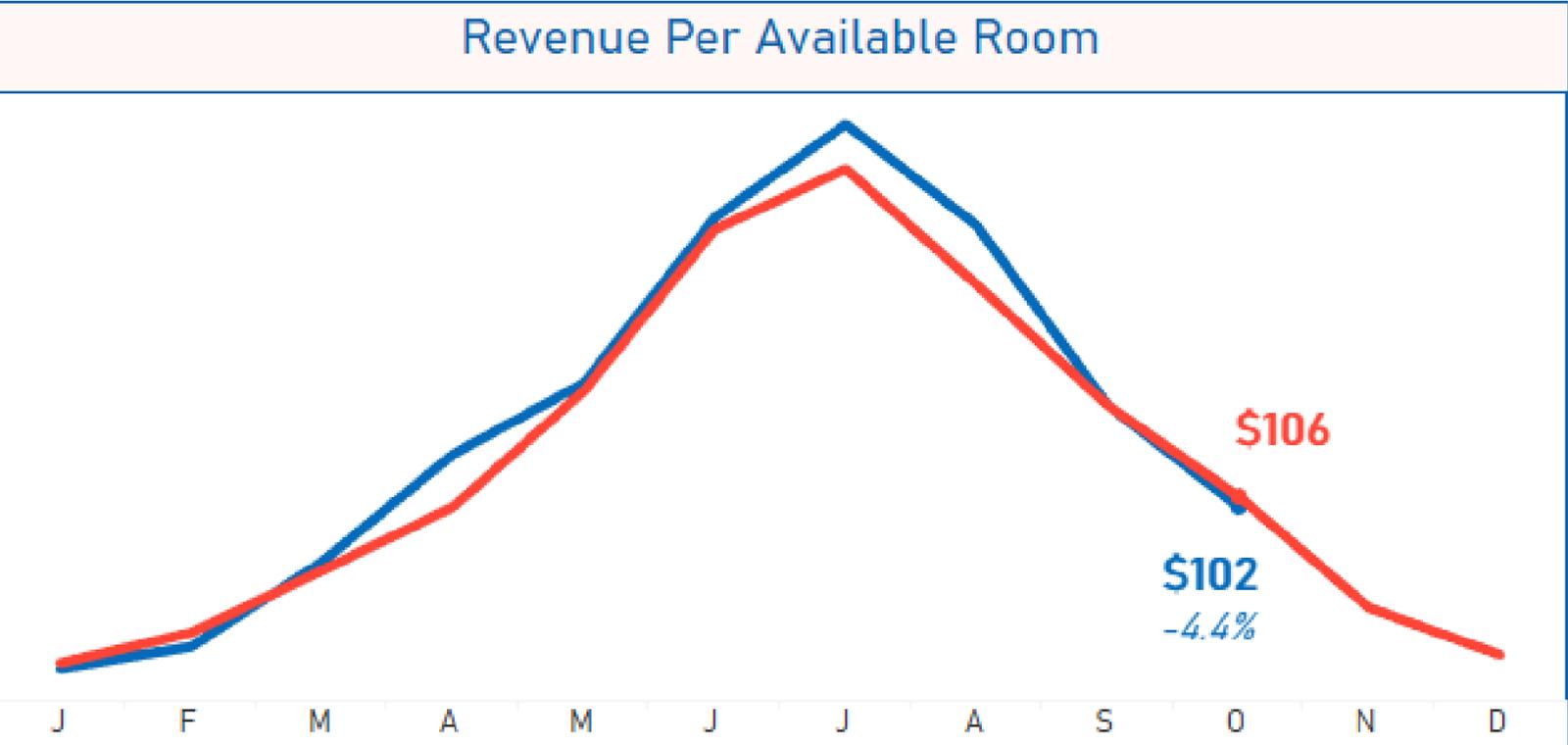
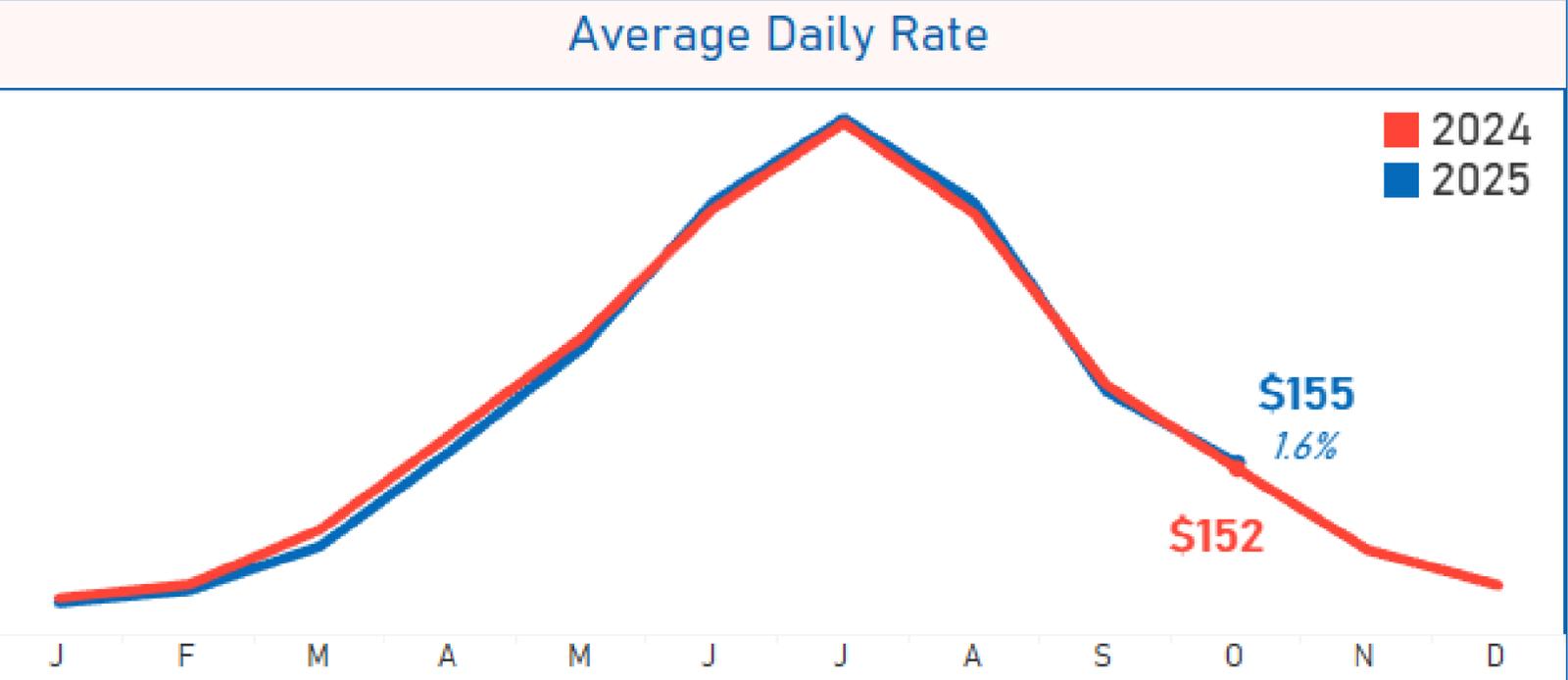
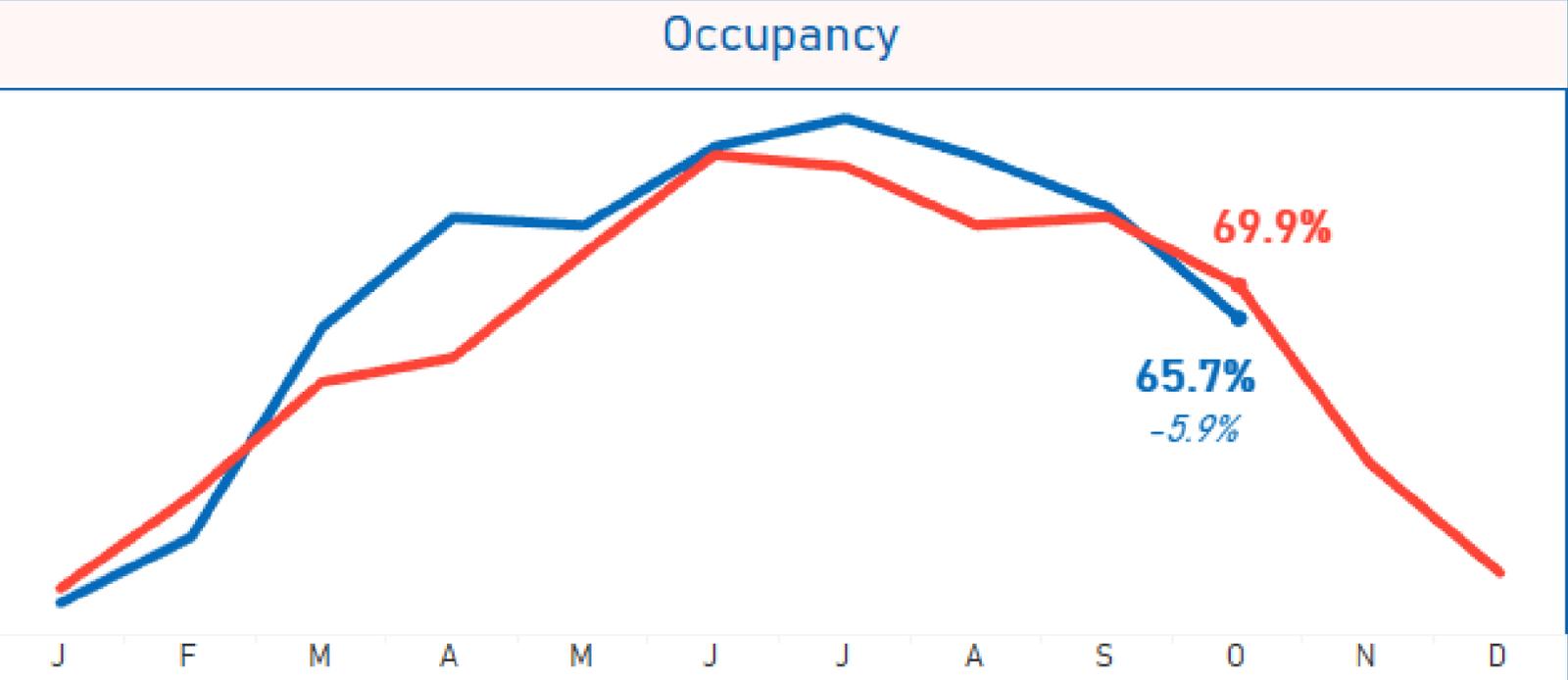


HISTORICAL HOTEL DATA

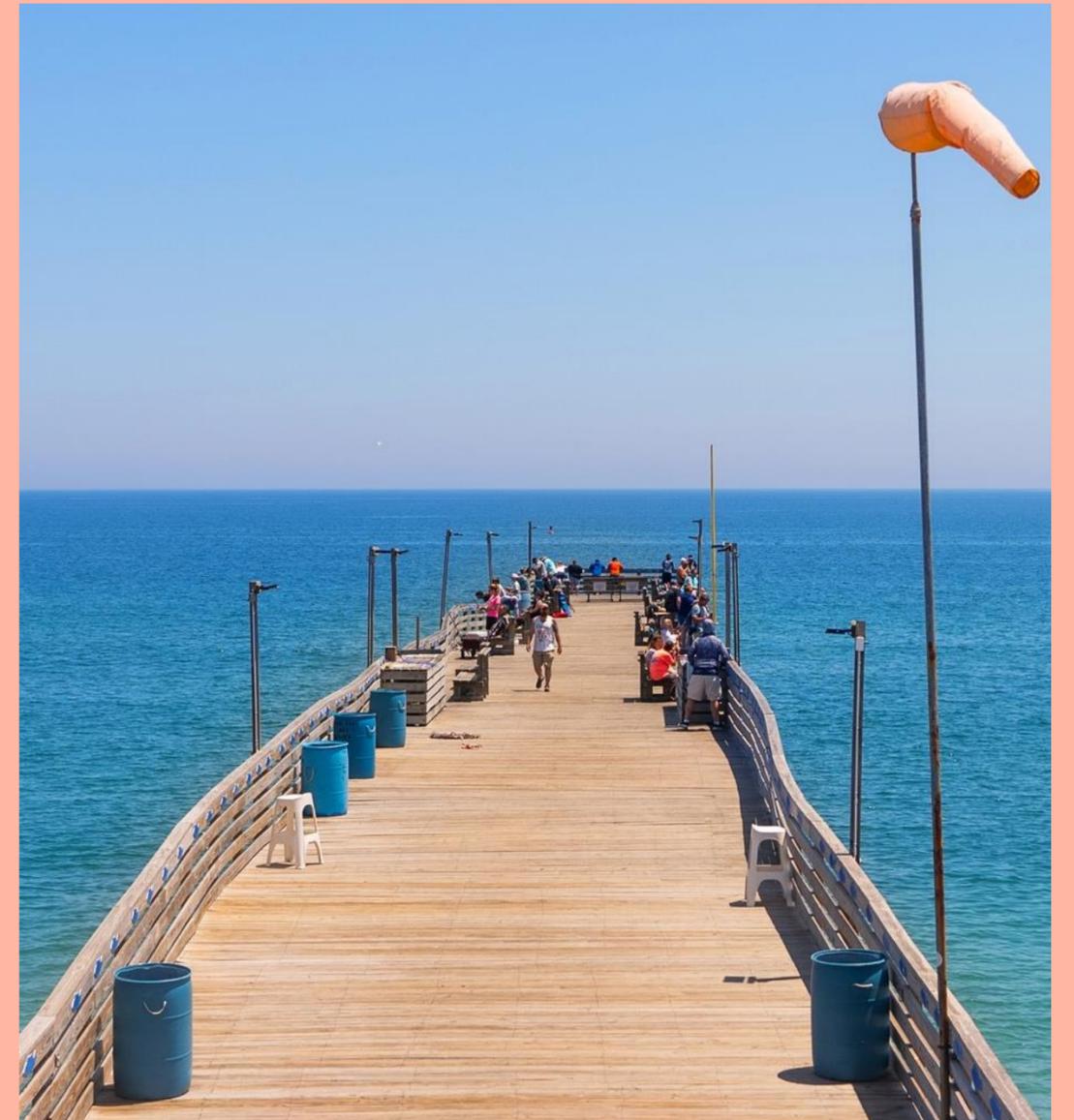


Dare County Monthly Hotel Performance October 2025

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



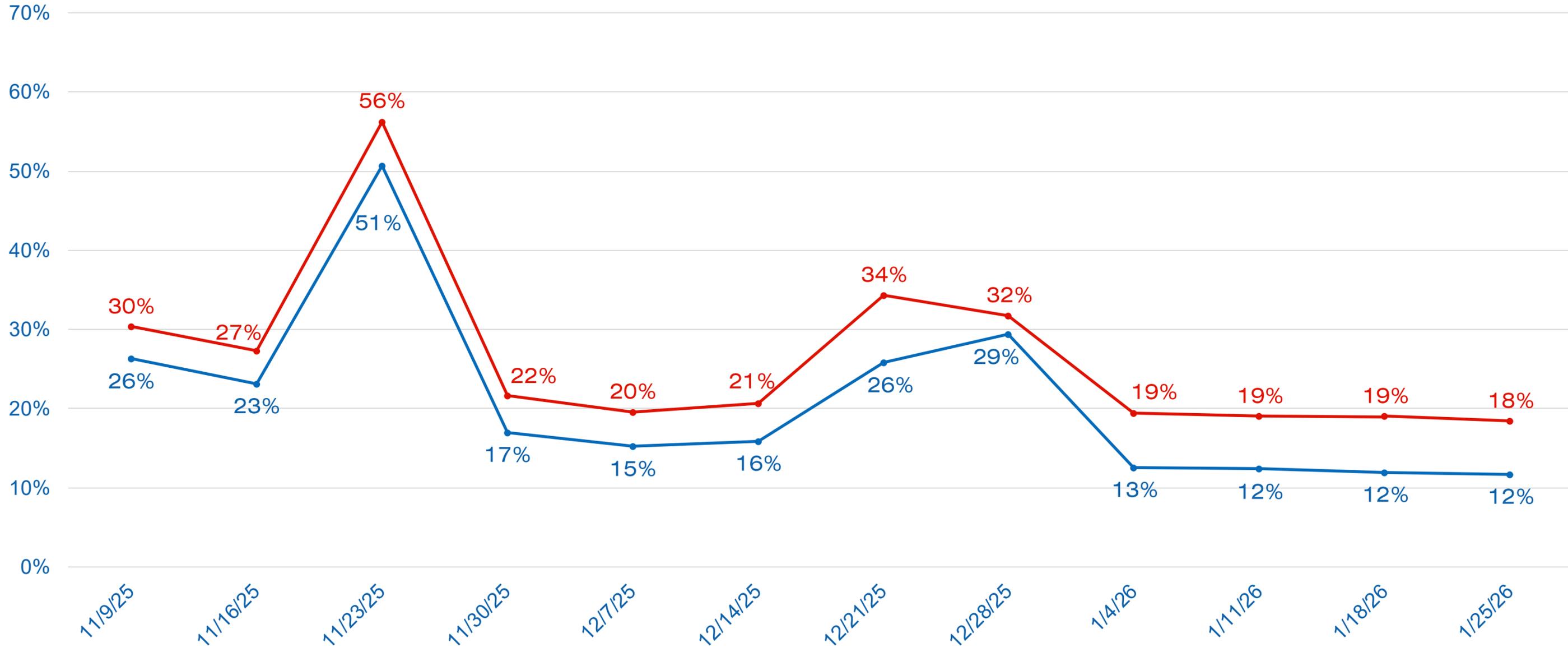
SHORT-TERM RENTAL PACING DATA



DARE COUNTY – PROJECTED OCCUPANCY BY WEEK

Pace by Week – Projected Occupancy (%)

— Current Year — Previous Year

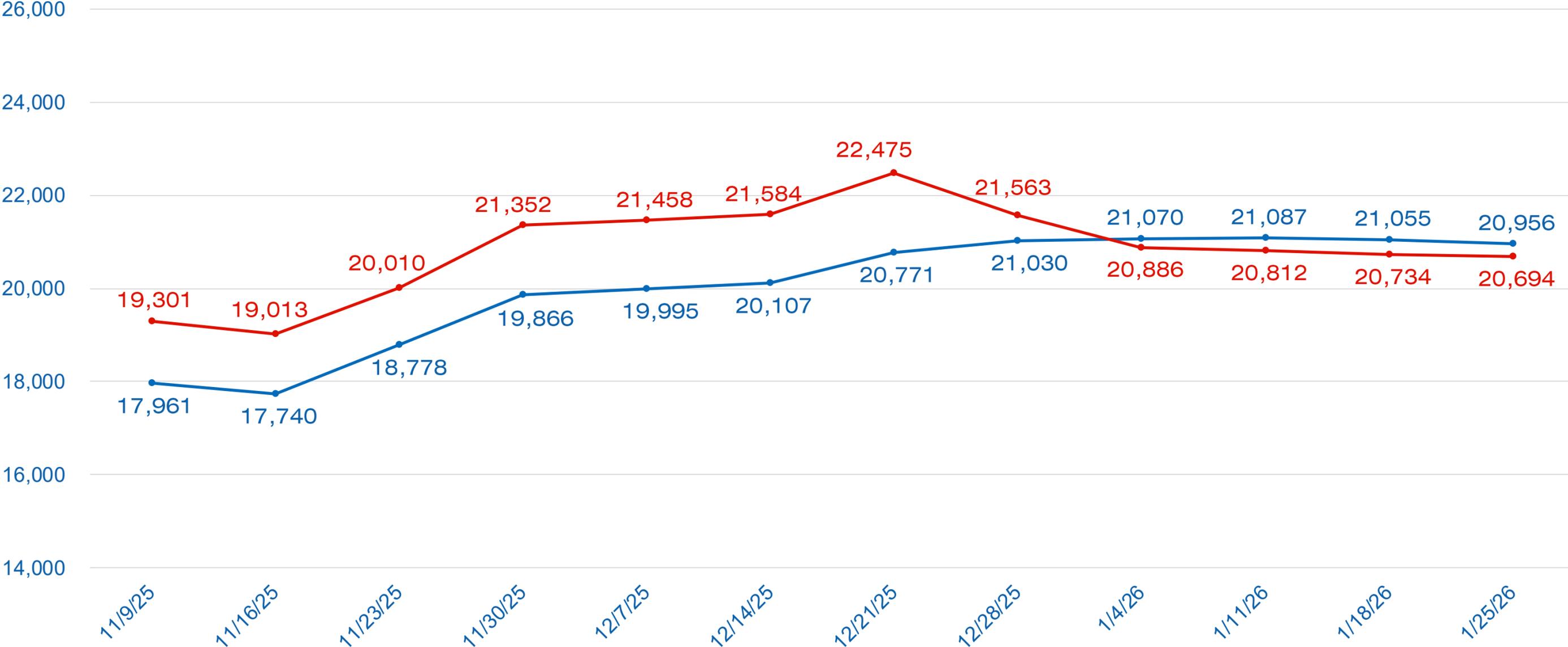


Source: Key Data (as of 11/11/2025)

DARE COUNTY – PROJECTED OWNER NIGHTS & HOLDS

Pace by Week – Projected Owner Nights & Holds

—●— Current Year —●— Previous Year

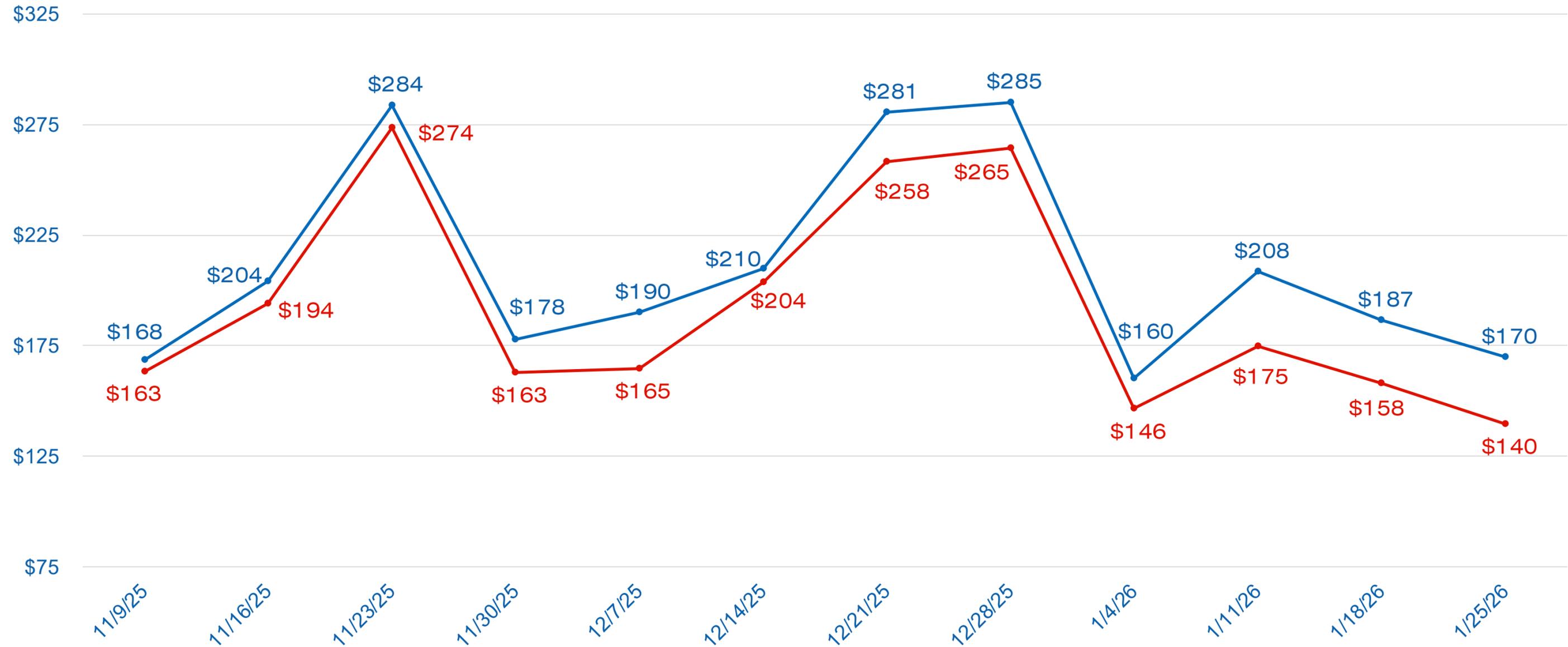


Source: Key Data (as of 11/11/2025)

DARE COUNTY – PROJECTED AVERAGE DAILY RATE

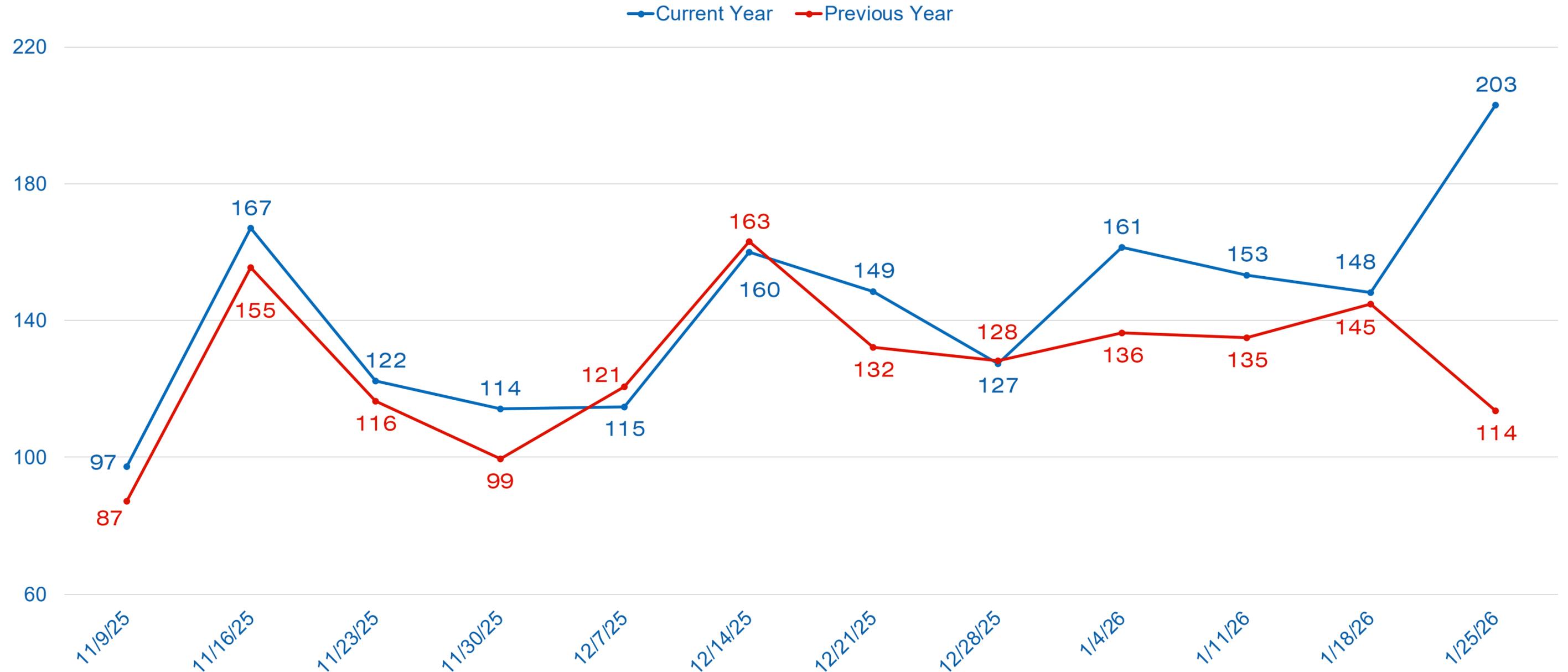
Pace by Week – Projected Average Daily Rate (\$)

—●— Current Year —●— Previous Year



DARE COUNTY – PROJECTED AVERAGE BOOKING WINDOW (DAYS)

Pace by Week – Projected Average Booking Window (Days)



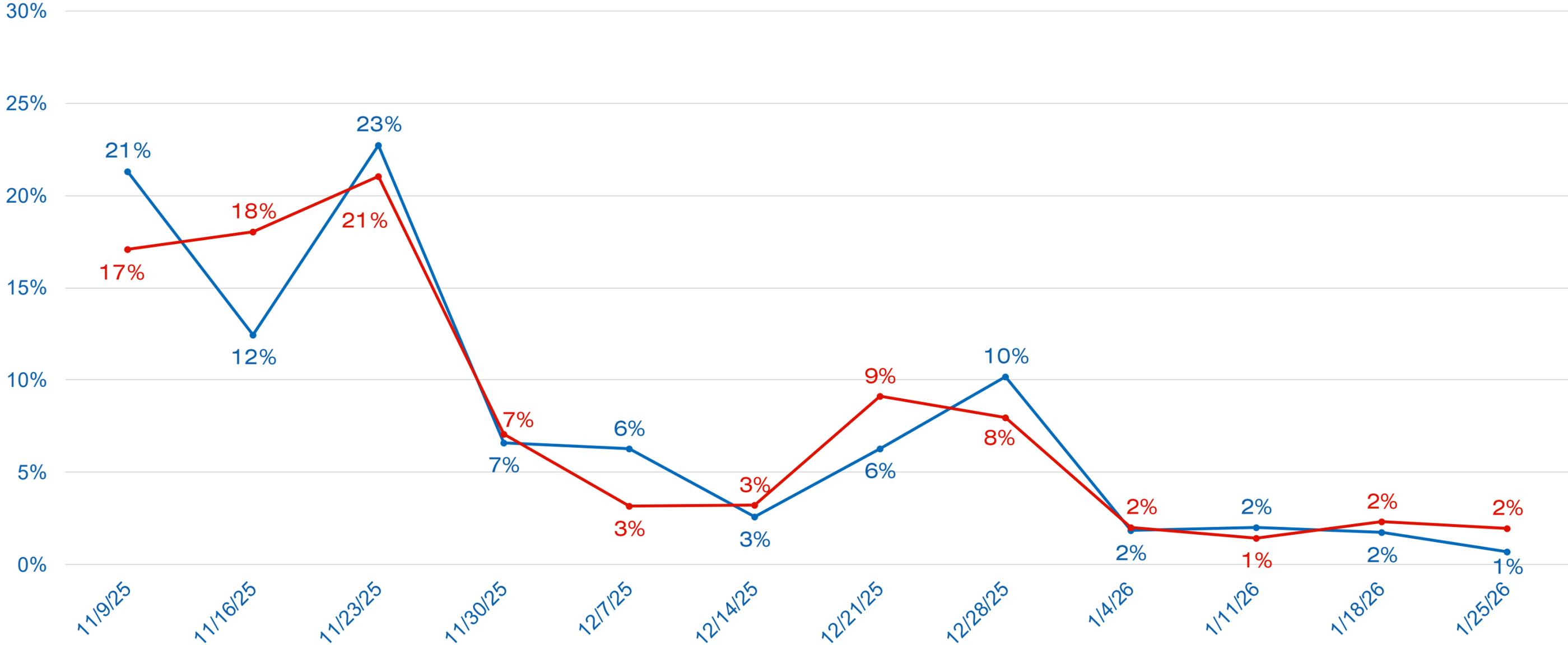
HOTEL PACING DATA



DARE COUNTY HOTELS – PROJECTED OCCUPANCY

Pace by Week – Projected Occupancy (%)

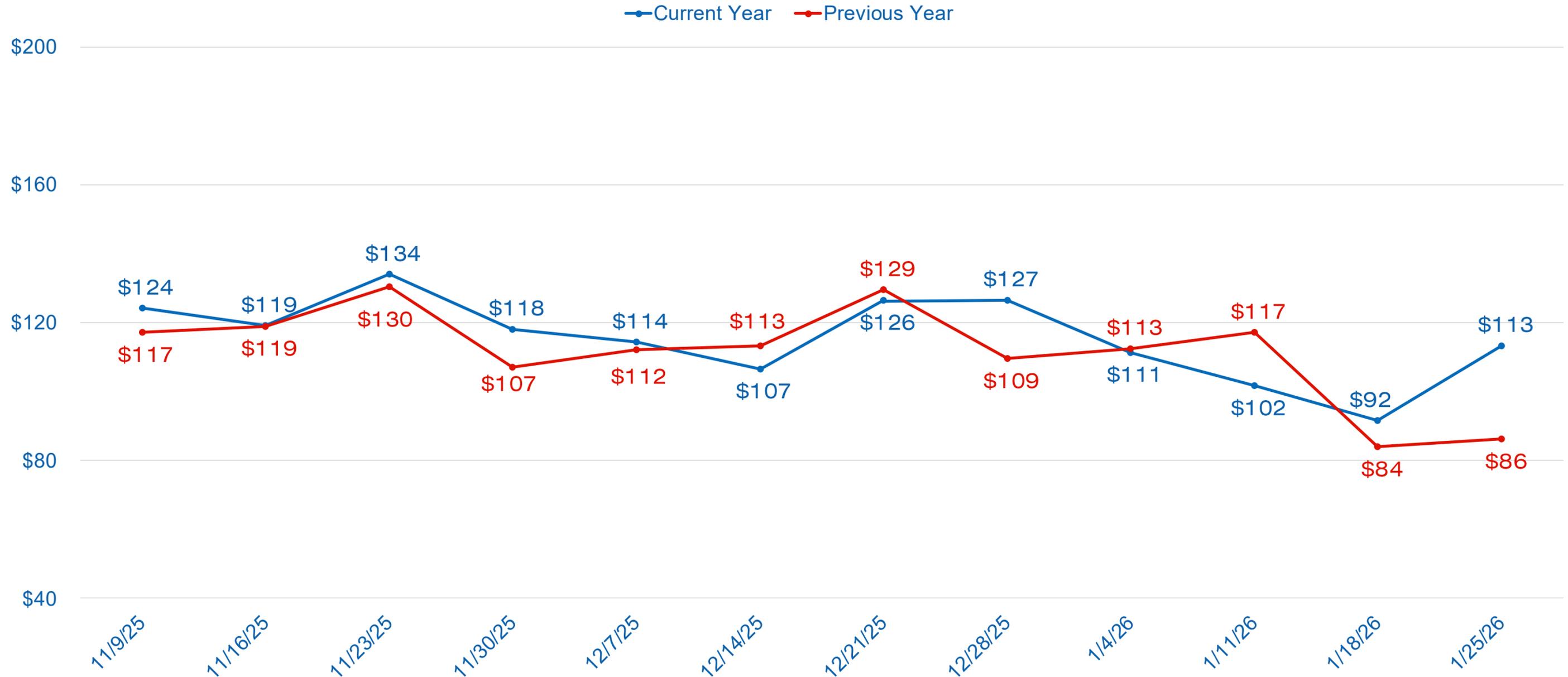
—●— Current Year —●— Previous Year



Source: Key Data (as of 11/11/2025, Sample = 12 hotels, 1,496 rooms)

DARE COUNTY HOTELS – AVERAGE DAILY RATE

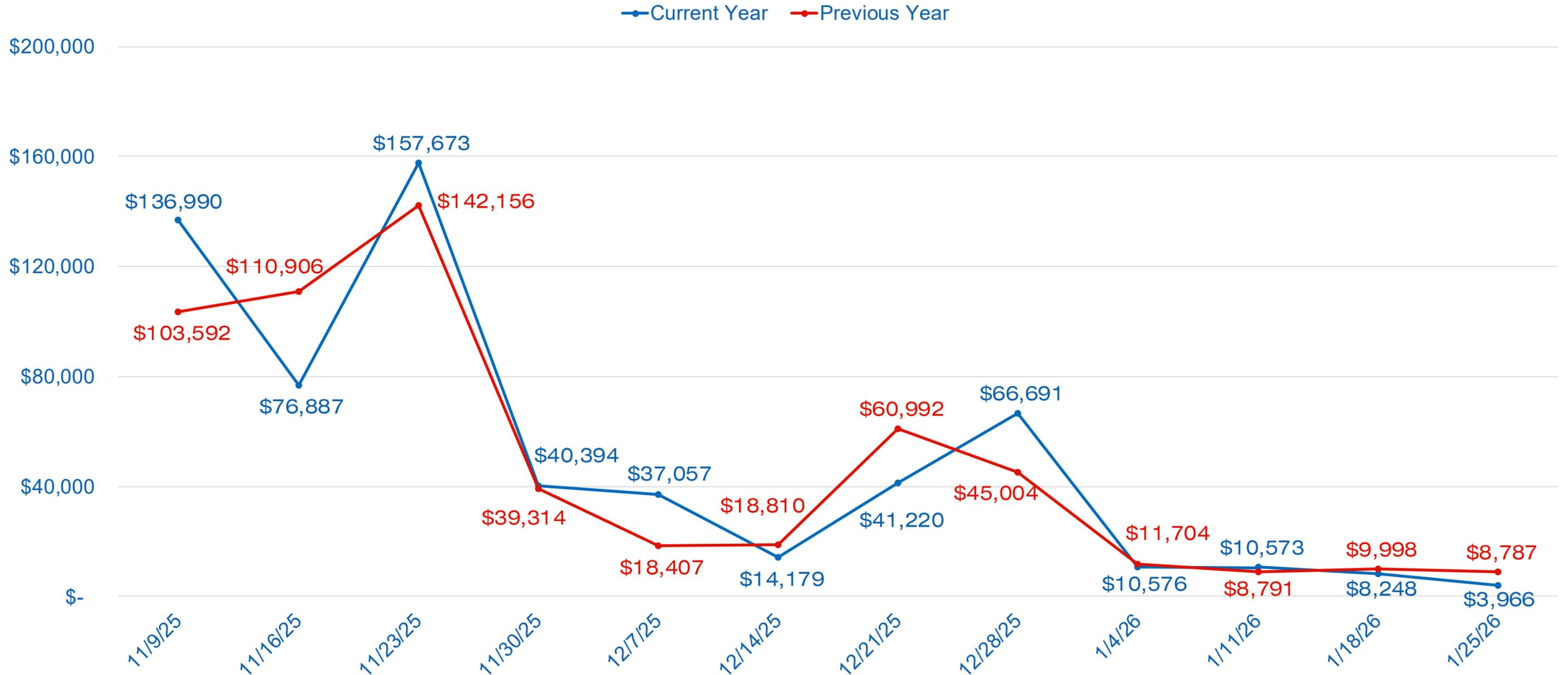
Pace by Week – Projected Average Daily Rate (\$)



Source: Key Data (as of 11/11/2025, Sample = 12 hotels, 1,496 rooms)

DARE COUNTY HOTELS – REVENUE

Pace by Week – Projected Revenue (\$)

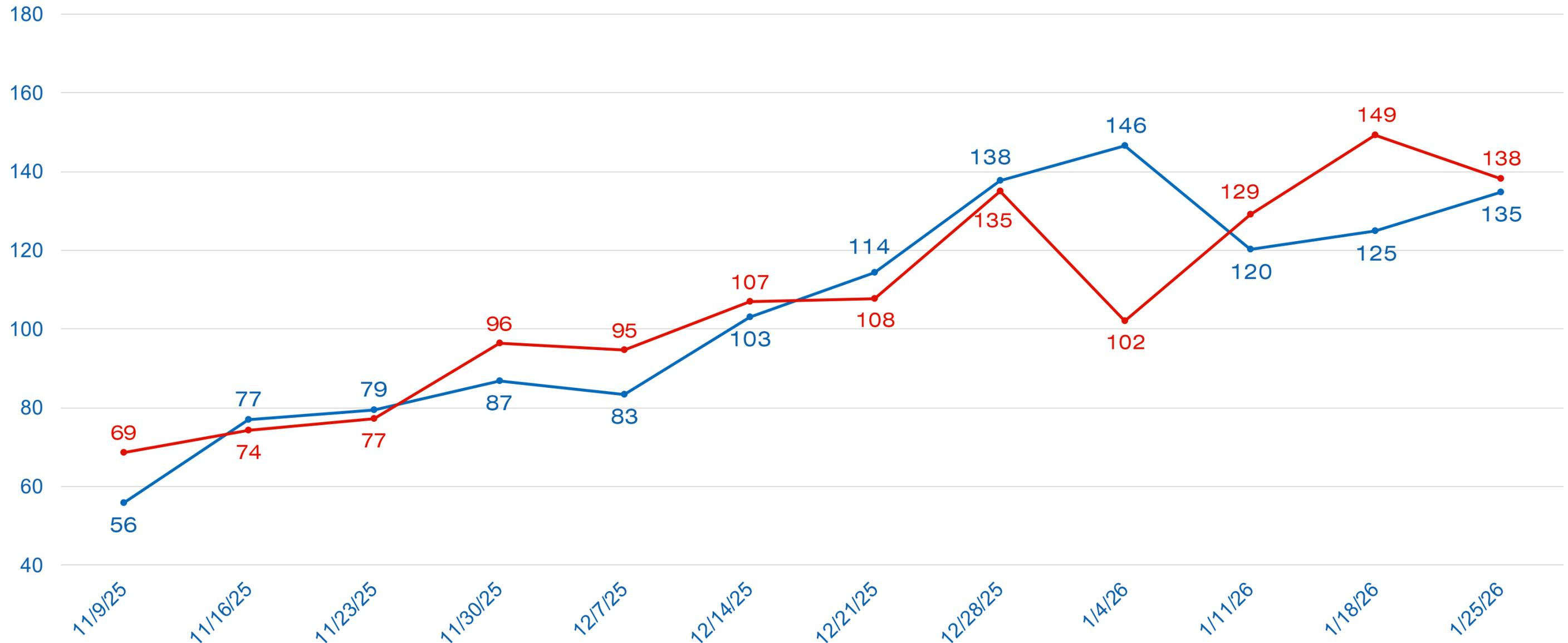


Source: Key Data (as of 11/11/2025, Sample = 12 hotels, 1,496 rooms)

DARE COUNTY HOTELS – AVERAGE BOOKING WINDOW (DAYS)

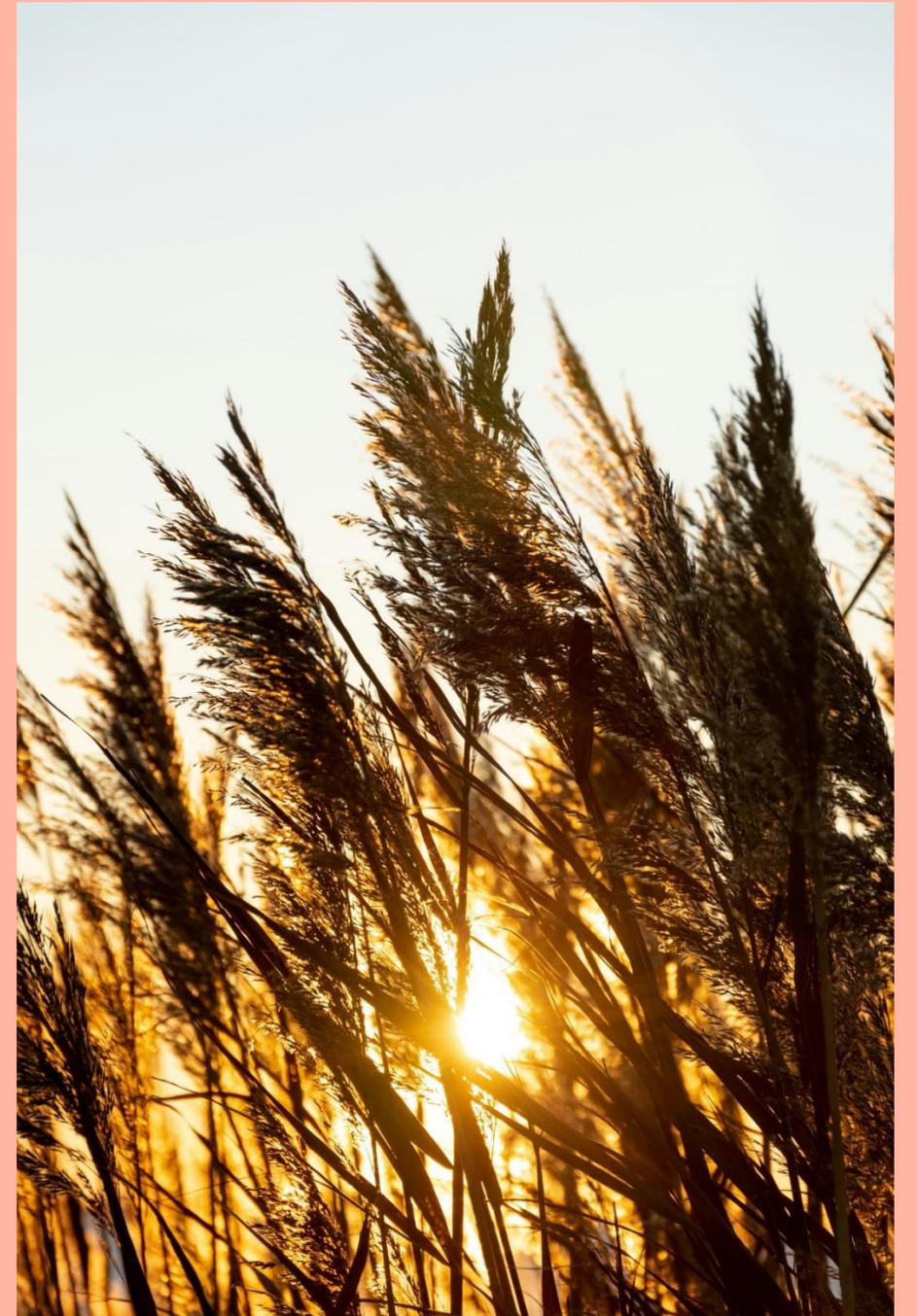
Pace by Week – Projected Average Booking Window (Days)

—●— Current Year —●— Previous Year



Source: Key Data (as of 11/11/2025, Sample = 12 hotels, 1,496 rooms)

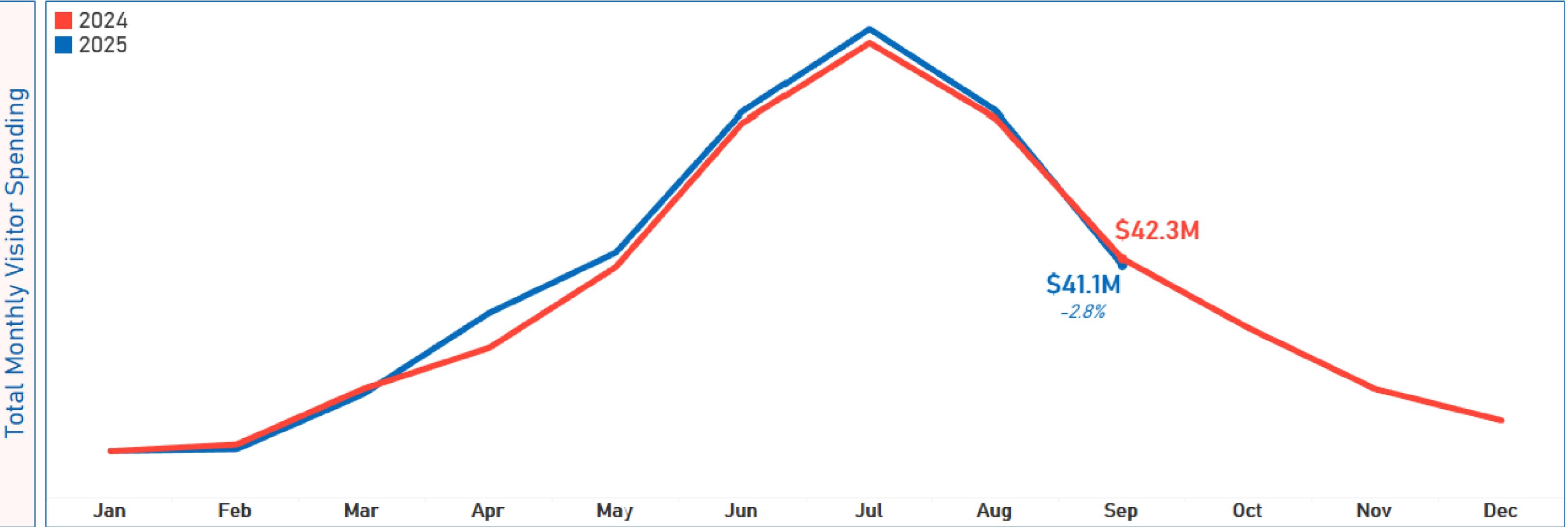
VISA DESTINATION INSIGHTS



Outer Banks Monthly Visitor Spending September 2025

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

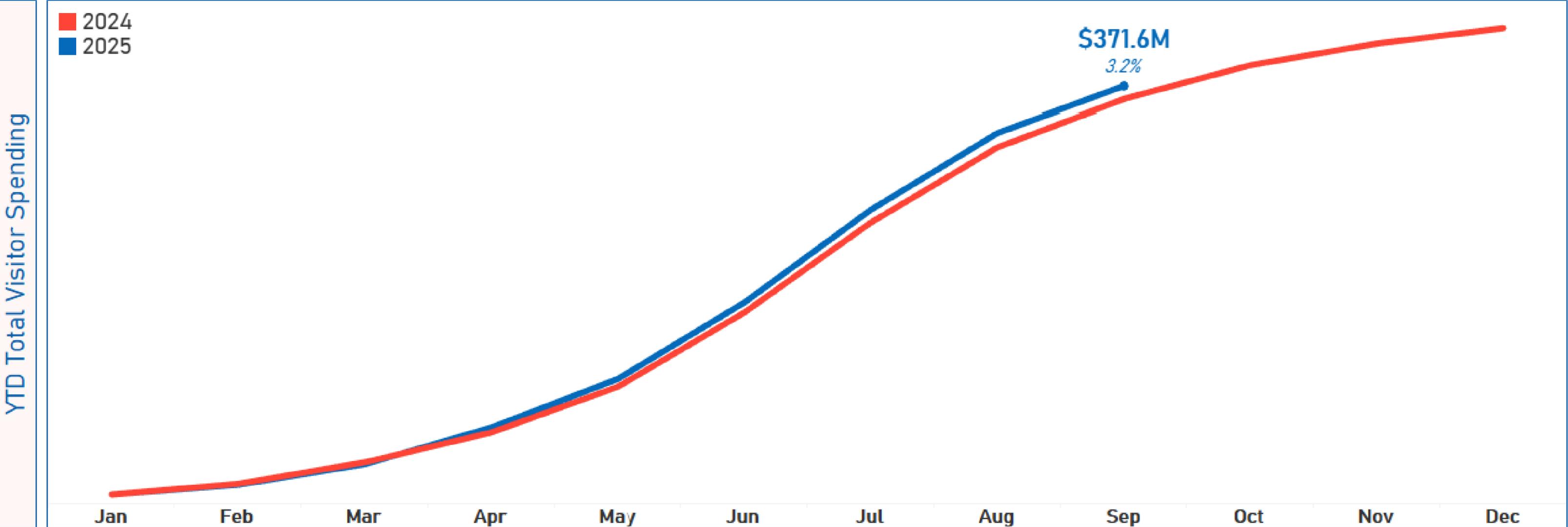
YOY Sep '25	Domestic Visitor		International Visitor		Visitor Grand Total	
	Spend Amount	Card Count	Spend Amount	Card Count	Spend Amount	Card Count
		\$40,872,070	211,030	\$232,582	1,032	\$41,104,652
	-2.7%	-3.4%	-24.2%	-33.5%	-2.8%	-3.6%



Outer Banks Monthly Visitor Spending Calendar YTD Through September 2025

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

YTD '25	Domestic Visitor		International Visitor		Visitor Grand Total	
	Spend Amount	Card Count	Spend Amount	Card Count	Spend Amount	Card Count
YOY	\$368,828,921	1,819,666	\$2,761,059	11,599	\$371,589,981	1,831,265
	3.6%	1.9%	-31.8%	-24.4%	3.2%	1.6%



Outer Banks Monthly Visitor Spending

Top Domestic Origin Markets - September 2025

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	\$5,200,799		-3.1%	32,908	-7.2%
Washington-Arlington-Alexandria, DC-VA-MD-WV	\$5,058,948		-8.9%	22,879	-9.7%
Richmond, VA	\$3,463,276		-0.9%	17,366	-4.6%
Baltimore-Columbia-Towson, MD	\$1,342,808		-6.5%	6,221	-7.5%
Raleigh-Cary, NC	\$1,275,200		-1.9%	7,648	-7.1%
Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	\$1,235,379		-3.6%	5,761	-5.3%
Pittsburgh, PA	\$946,431		-6.4%	4,106	-6.0%
New York-Newark-Jersey City, NY-NJ-PA	\$747,660		-6.1%	3,655	-14.0%
Elizabeth City, NC	\$707,475		6.0%	5,974	2.0%
Charlotte-Concord-Gastonia, NC-SC	\$615,765		-4.3%	3,873	11.0%
Charlottesville, VA	\$605,905		0.9%	2,723	-5.3%
Harrisburg-Carlisle, PA	\$421,641		-2.2%	1,821	-3.4%
Winchester, VA-WV	\$392,758		-3.4%	1,565	-6.8%
Roanoke, VA	\$390,864		22.3%	1,561	5.6%
Lynchburg, VA	\$383,663		-13.1%	1,862	-12.0%

DIGITAL MARKETING METRICS



Outer Banks Visitors Bureau

FY25-26 Paid Media

October 2025 Dashboard



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.

October 2025 Highlights

- **Paid Media:** Impressions were up 37% YoY, primarily driven by the Outside custom partnership. Both impressions and video views are up significantly compared to the same time frame last fiscal year.
 - Note: October Linear TV metrics for Outside, including video views, are not yet available. Once received, they will be added into deliveries.
 - Continuity:
 - Native Display creative on Teads supported Volunteer Week, Cozy Inns, Haunted Spots, Halloween Fun, and the Seafood Festival. The Seafood festival creative generated the best CTR at 0.52%. Users in the Email Retargeting audience who clicked the Haunted Spots creative spent the most time on the website, at 1 minute 50 seconds.
 - Fall: Remaining Fall media ended by 10/31, including the Outside Custom Partnership, Native Display (Teads & Google - Guidebook), and YouTube (Streaming Video + Monthly Boosts).
- **Website:** Total monthly sessions were flat YoY, with Organic Search (32%) and Paid Search (28%) driving the majority of site sessions.
 - The /plan-your-trip/ page saw the largest growth (Oct 2025 vs. Oct 2024) at +16K page views or 10%. Traffic to the beach webcams page made up a majority of traffic to /plan-your-trip/ pages (69%).
- **Email:** 101K emails were sent across consumer marketing contact sublists and various workflows, achieving an overall 19% open rate, 8% CTR (opens), and a 0.64% bounce rate. Total opens for the month were up 6% YoY.
 - The October 2025 OBX email "Spooky or Secret? Get Both on the OBX" earned an 18% open rate and 7% CTR (opens), with most clicks going toward the OBX Seafood Festival event module (19%), followed by the CTA button Check out seasonal travel specials (18%).
 - A seasonal Active Vacationer email titled "Calling Adventurous Spirits to the OBX" was also sent out to the members of the active vacationer workflow. This earned a 23% open rate and 12% CTR (opens), with most clicks going to the Halloween events module (27%).
 - Among workflows, the Art, History & Culture workflow performed the best, achieving a 30% open rate and 42% CTR (opens)!

Dashboard was updated on 11/12/25. Data is reviewed and validated through - Media, Email, and Website: 10/31/25.

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

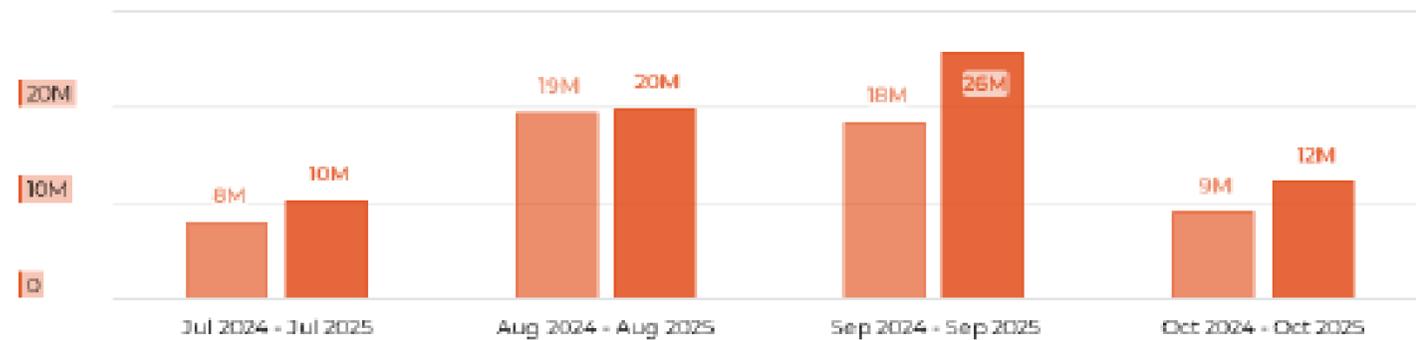
delivery trends

FYTD: Impressions

67,923,489
+ 24.49% (13,363,133)

Monthly Impressions Delivered vs. Previous Year

Impressions

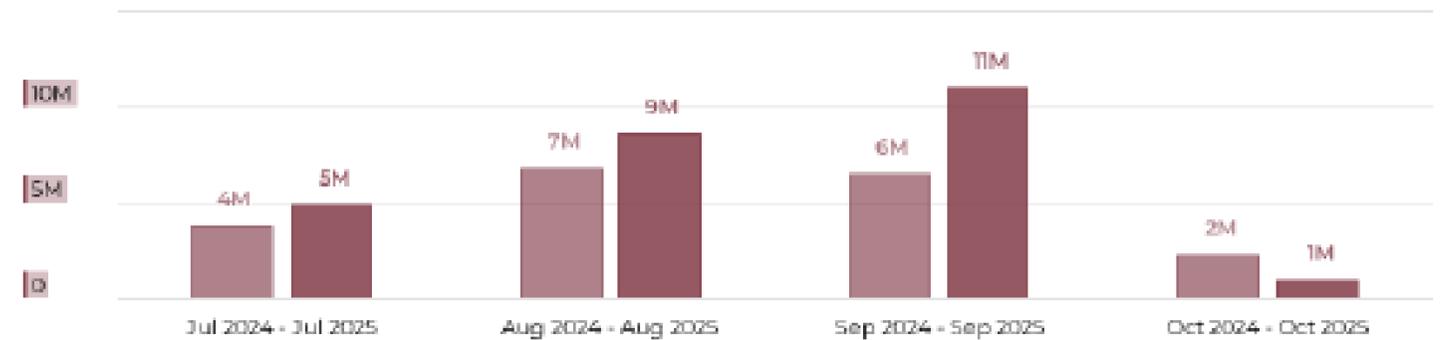


FYTD: Video Views

25,582,413
+ 32.31% (6,247,936)

Monthly Video Views Delivered vs. Previous Year

Video Views

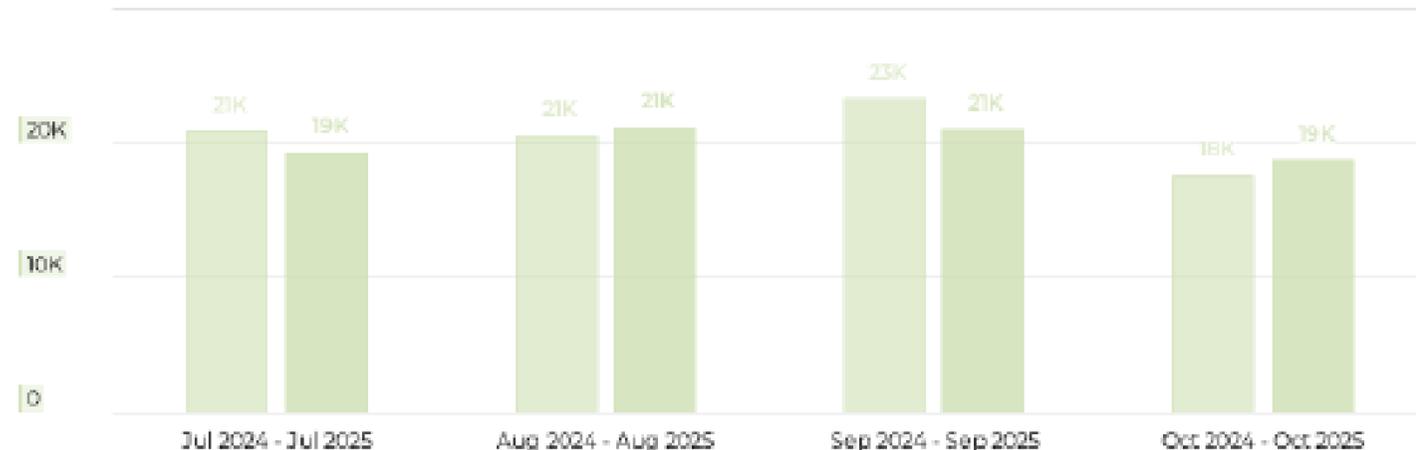


FYTD: Email Opens

80,252
+ -2.55% (-2,099)

Monthly Email Opens v. Previous Year

Email Opens

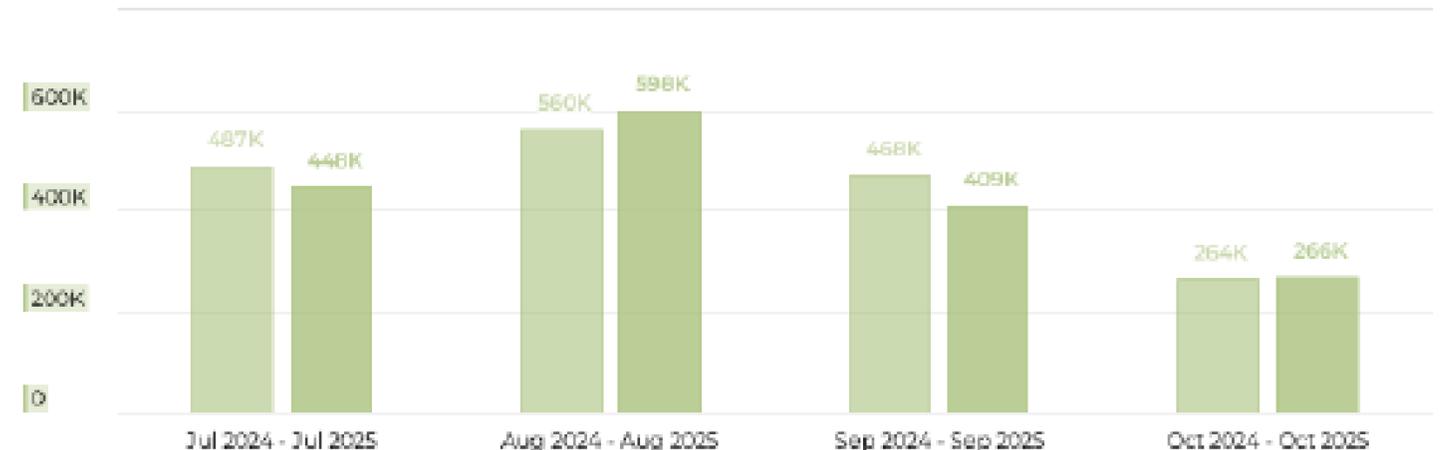


FYTD: Website Sessions

1,720,994
+ -3.27% (-58,238)

Monthly Website Sessions v. Previous Year

Sessions





Executive Summary

Drive Awareness

KPI: Impressions

Performance As Of:	Oct 2025	Oct 2024	Base Goal	Stretch Goal
Current Month	4,903,045	4,572,942	4,783,263	6,471,474
Cumulative Fiscal	16,148,467	14,373,680	16,583,900	22,437,041
Cumulative % To Target		112%	97%	72%

Drive Intent

KPI: Website Sessions Referred by Social Sources

Performance As Of:	Oct 2025	Oct 2024	Base Goal	Stretch Goal
Current Month	64,476	49,562	31,748	38,621
Cumulative Fiscal	131,082	100,447	105,944	128,880
Cumulative % To Target		130%	124%	102%

Engage

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

Performance As Of:	Oct 2025	Oct 2024	Base Goal	Stretch Goal
Current Month	266,109	294,043	256,615	313,641
Cumulative Fiscal	996,915	547,026	820,278	1,002,562
Cumulative % To Target		182%	122%	99%

Convert

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

Performance As Of:	Oct 2025	Oct 2024	Base Goal	Stretch Goal
Current Month	1,795	1,065	1,502	1,755
Cumulative Fiscal	8,030	5,336	5,170	6,039
Cumulative % To Target		150%	155%	133%

Key Messaging:

- Autumn tranquility on the OBX
- Spooky spots on the OBX
- OBX Webcams

Performance Overview:

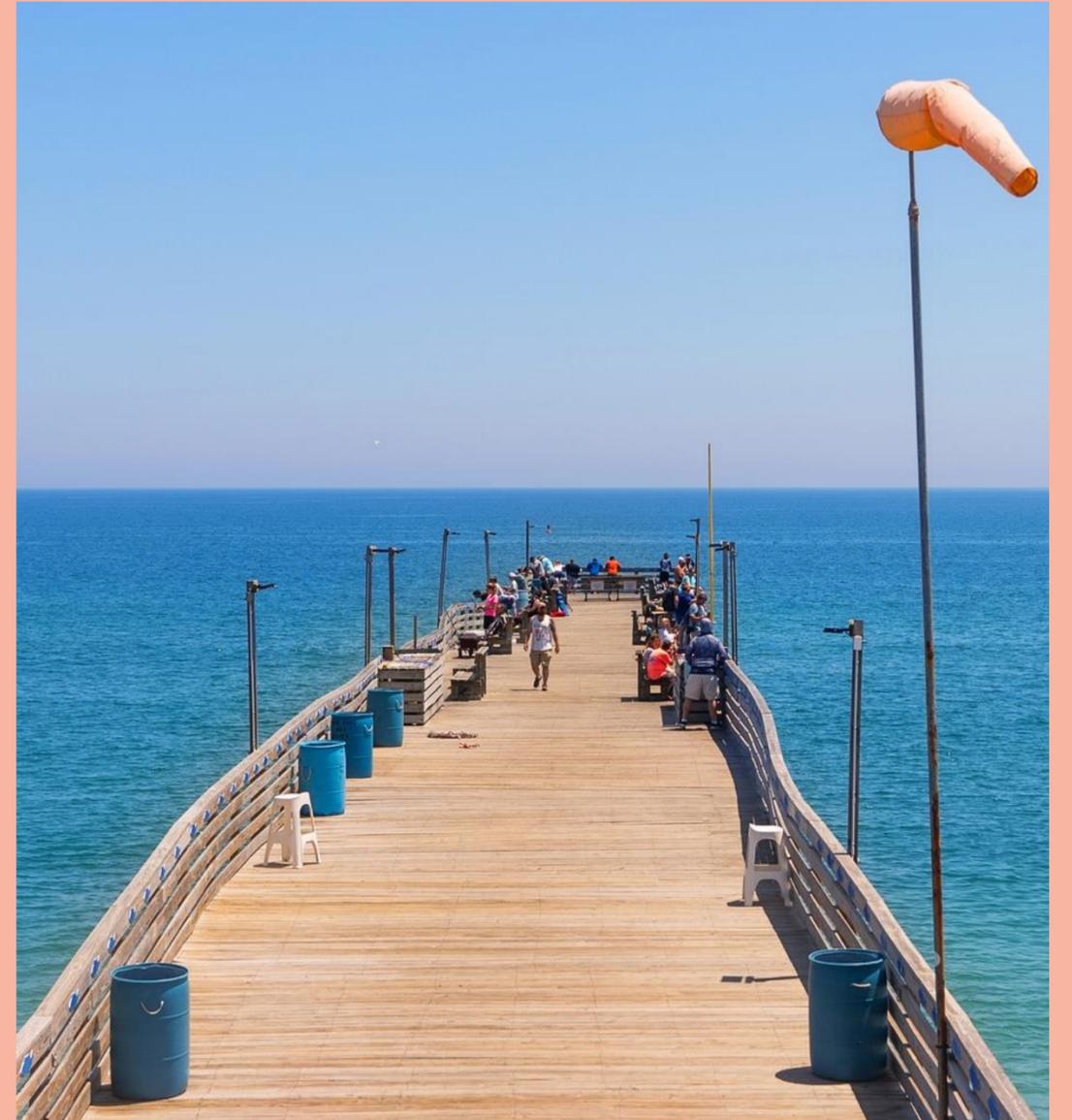
- Ads were paused in October in sensitivity with over-wash and house collapses. Pause did not appear to have an impact on results as all KPIs exceeded monthly goal projections.
- Traffic, engagement, and conversion performance YTD is trending above projected goal with traffic and conversions currently trending above stretch goal. While impressions are trending slightly below goal (97% to goal), October performance exceeded projections for the month.

Next Steps & Recommendations:

- Ignite will be supporting Hoffman York by reincorporating ads directing users to the eNews sign-up page to encourage more direct subscribers. Ignite will monitor cost/conversion and fold into future conversion campaigns if efficient.
- Continue to incorporate a “trendy style” content approach with TikTok videos.
- Remaining funds for Reddit test will be used to drive Travel Guide requests in January when the new guide is available and media costs are likely to be lower.

The Outer Banks Visitors Bureau

BUREAU FULFILLMENT



Outer Banks Visitors Bureau Monthly Fulfillment FY 2026, October

YOY	Type of Request					Total
	Calls	Print	Online	eGuide	Mail	2,742
	7	7	1,705	1,023	0	
	-58.8%	-50.0%	-2.9%	65.8%		14.1%



TRAVELER SENTIMENT



AMERICAN TRAVEL SENTIMENT STUDY (WAVE 101)

*Survey fielded October 7, 2025; US National Sample of 1,000 adults 18+

American Travel Sentiment Wave 101 Highlights

Key Findings:

1. A Look at Travel and Spending Habits this Holiday Season

41% of travelers plan to alter their frequency of travel this holiday season compared to last year. 23% plan to travel less this holiday season compared to last year, up 6-points from October 2024, while 18% plan to travel more this holiday season. 59% of travelers, however, plan to travel about the same amount this holiday season, indicating a strong holiday travel season this year. An equal number of travelers plan to spend more (24%) and spend less (24%) this holiday season, while 52% plan to spend about the same this holiday season compared to last year.

2. Travel by Car for the Holiday Season Popular Among Travelers

A majority of travelers (55%) plan to travel by car this holiday season, which is in line with 2024 holiday travel. 38% say they are using a car to travel for Thanksgiving, which is followed by car travel for Christmas/Hanukkah/Kwanzaa (29%). 30% of travelers say they plan to travel by plane, with 15% traveling by plane for Christmas/Hanukkah/Kwanzaa.

3. A Focus on Family this Holiday Season

This holiday season travelers have a focus on family. Half of travelers (50%) plan to travel with their spouse/significant other this year followed by 35% saying they plan to travel with their child(ren). The top activity travelers are participating in this holiday season is visiting friends/family, up highlighting the value of family and connection this holiday season.

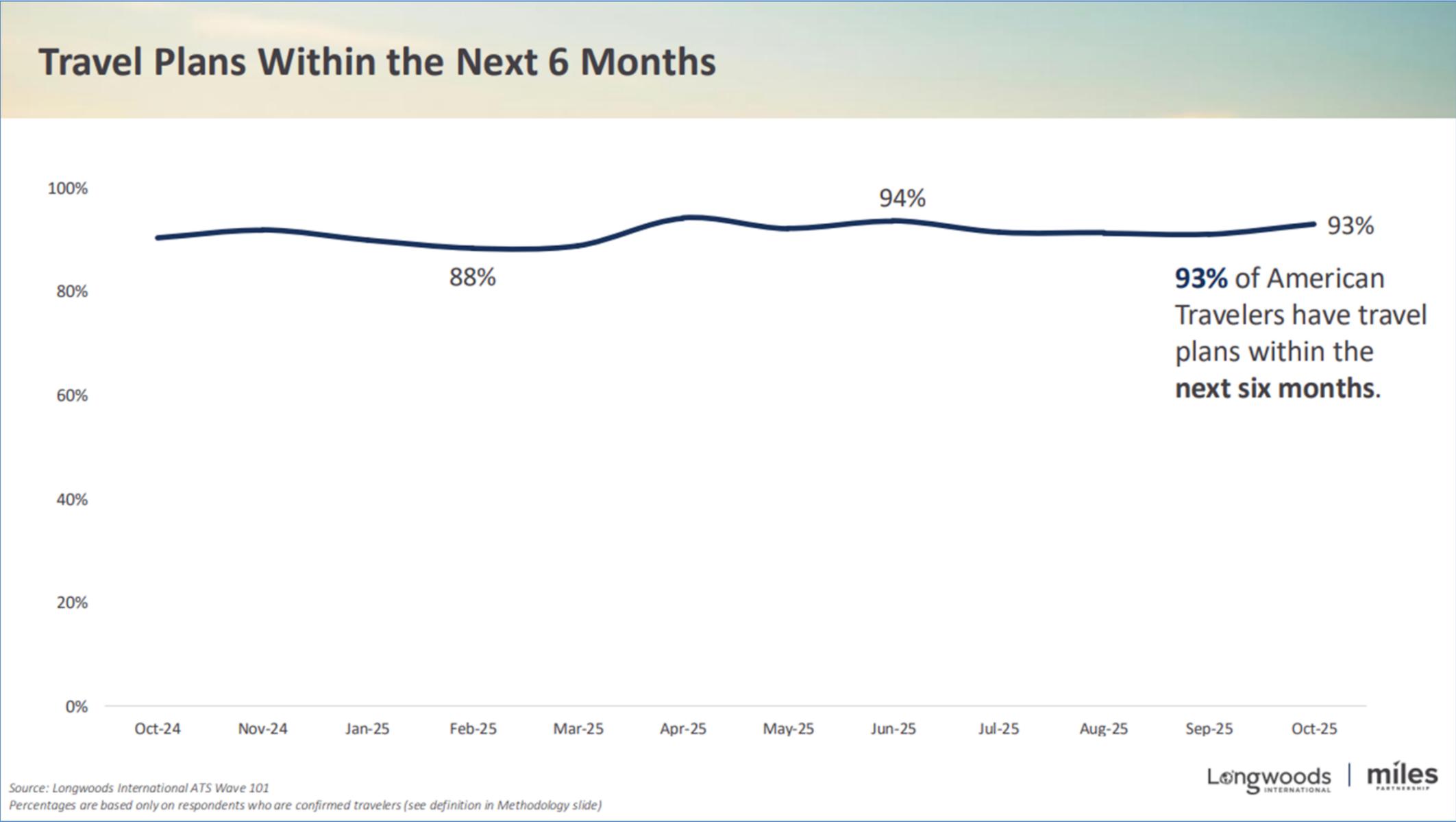


Source: Longwoods International ATS Wave 101

Longwoods INTERNATIONAL | miles PARTNERSHIP

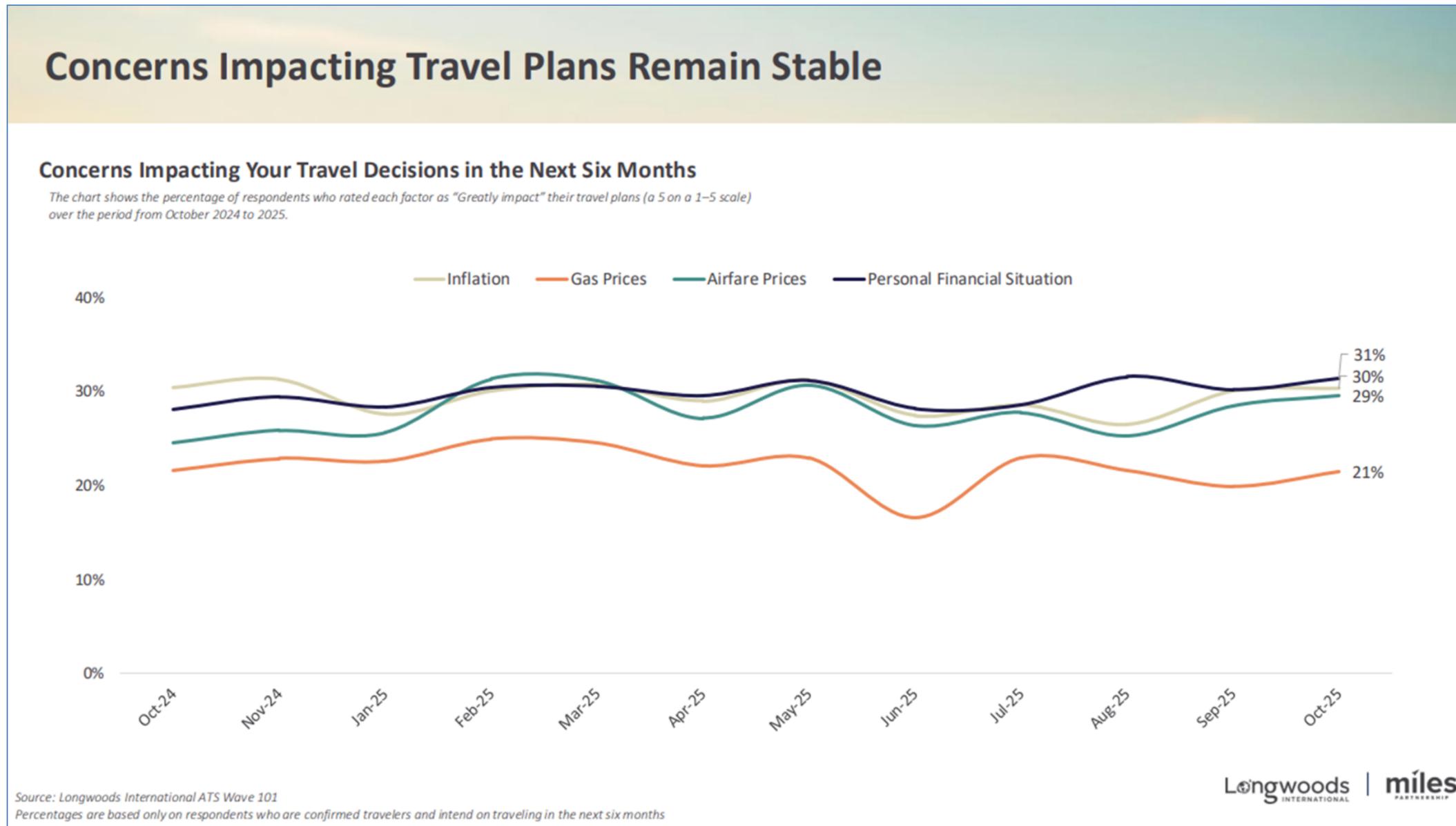
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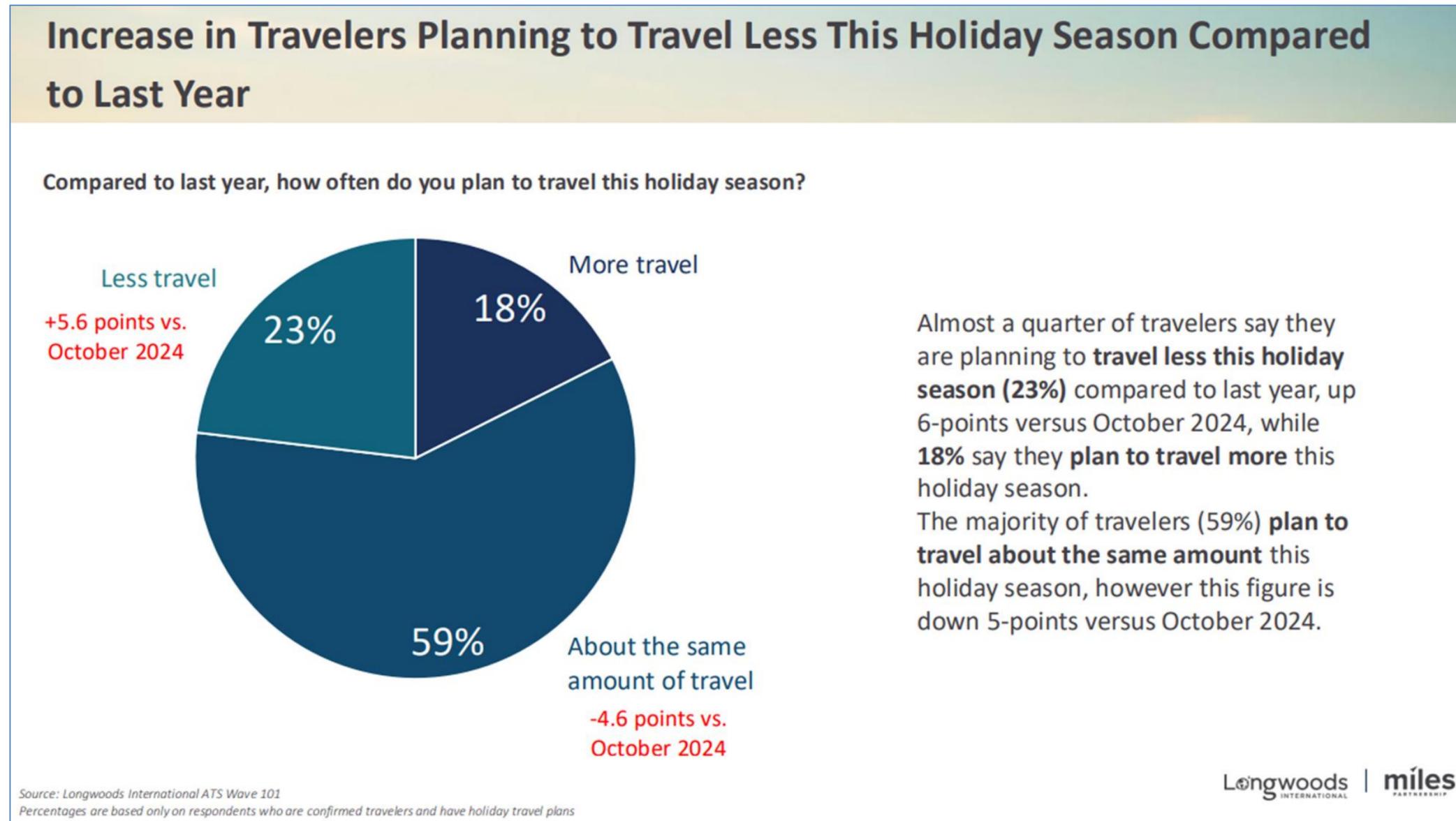
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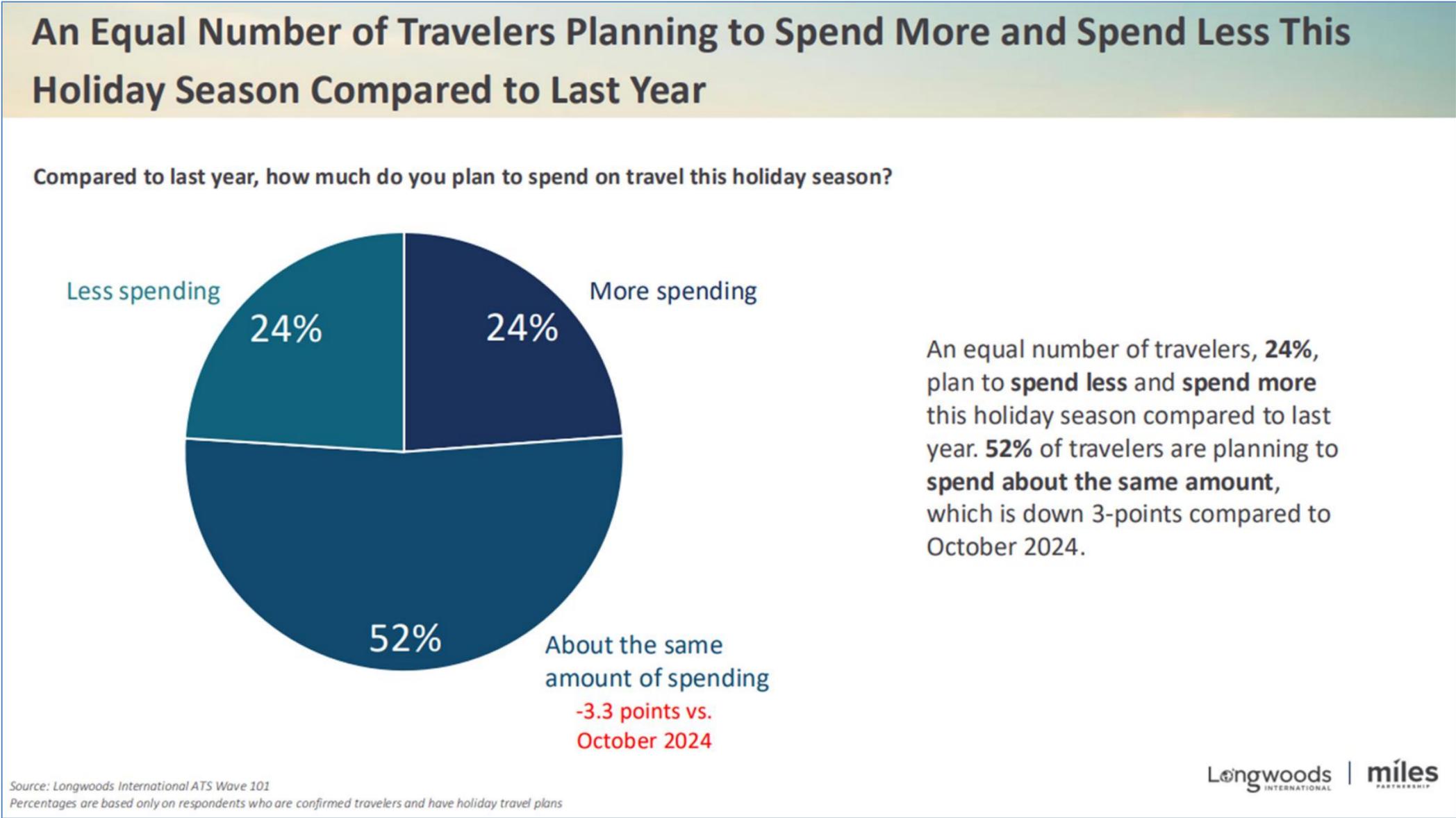
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American Travel Sentiment Methodology

The American 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: October 7, 2025
- 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.

