


MONTHLY RESEARCH UPDATE

December 2025 Review

 (877) 629-4386

 One Visitors Center Circle, Manteo, NC 27954

 www.outerbanks.org

EXECUTIVE SUMMARY

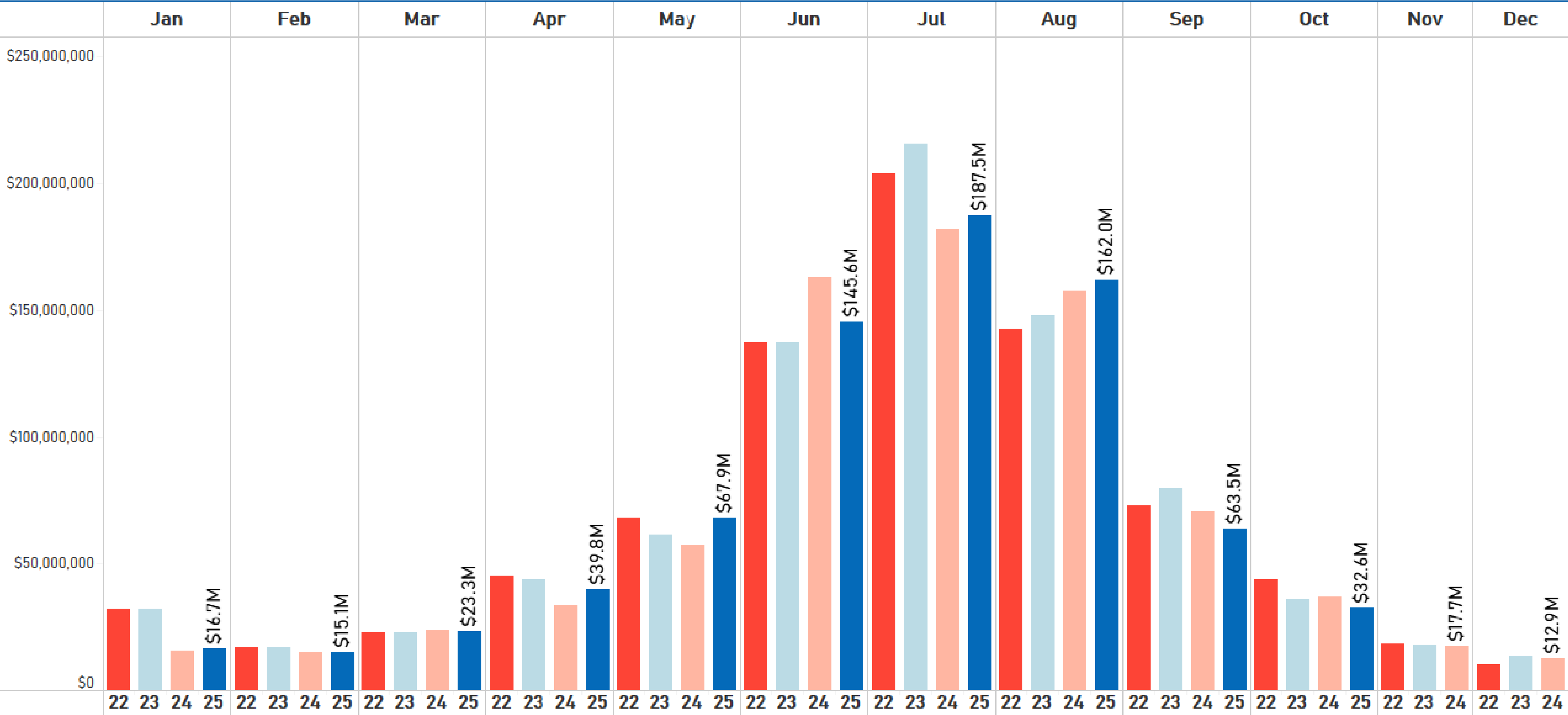
- In December, guest Demand among Dare County's short-term lodging properties rose by 5.6% compared to last year, while Owner Nights fell by 14.3% Year-over-Year (YoY). As a result, Occupancy for the month decreased by 11.9% compared to last December. The adjusted Occupancy came to 27.0% throughout the county for the month.
 - Each region throughout the Outer Banks saw Occupancy decrease in December compared to last year. Rentals on Hatteras Island saw the highest average Occupancy at 30.5%, followed by Roanoke Island at 29.2%, and Northern Beaches at 24.8%.
 - Throughout Dare County, Average Daily Rate (ADR) dipped by 3.8% YoY to \$202. The Northern Beaches remain the regional leader with an ADR of \$260, followed distantly by Hatteras Island at \$129, and Roanoke Island at \$111.
- Guest Demand among Dare County's hotels increased in December, as properties sold 2.6% more guest nights compared to last year, causing Paid Occupancy to rise by 2.6% YoY. Hotels averaged 34.4% Occupancy for the month.
 - Hotel ADR also increased for the month, rising by 3.1% YoY to average \$105 for the month. Paired with strengthened Demand, hotel Revenue increased by 5.8% YoY to total \$830K in December.
- In-market visitor spending on Visa cards totaled \$19.1 million in November 2025, relatively unchanged from the same month last year with a slight 0.7% dip. Calendar Year-To-Date (YTD), visitor spending totals \$418.5 million, up 2.2% YoY.
 - Visitors from the Virginia Beach MSA (-0.4% YoY), Washington DC MSA (-4.1%), and Richmond area (+2.4%) were the largest domestic spenders in November. Overall, domestic visitor spending was just 0.7% lower compared to last year.

TAX COLLECTIONS DATA



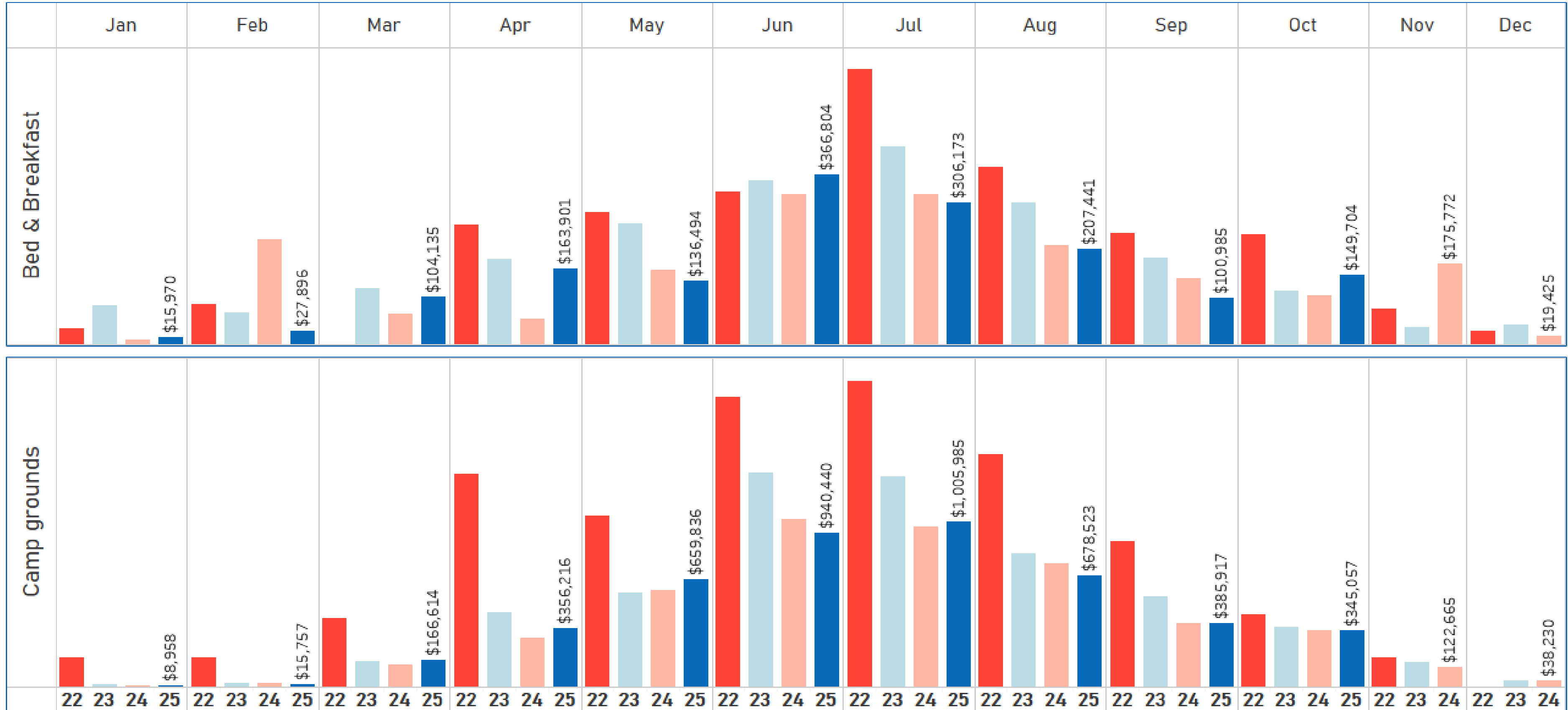
Outer Banks Gross Occupancy Summary Collections Through October 2025

Source: Dare County Tax Office



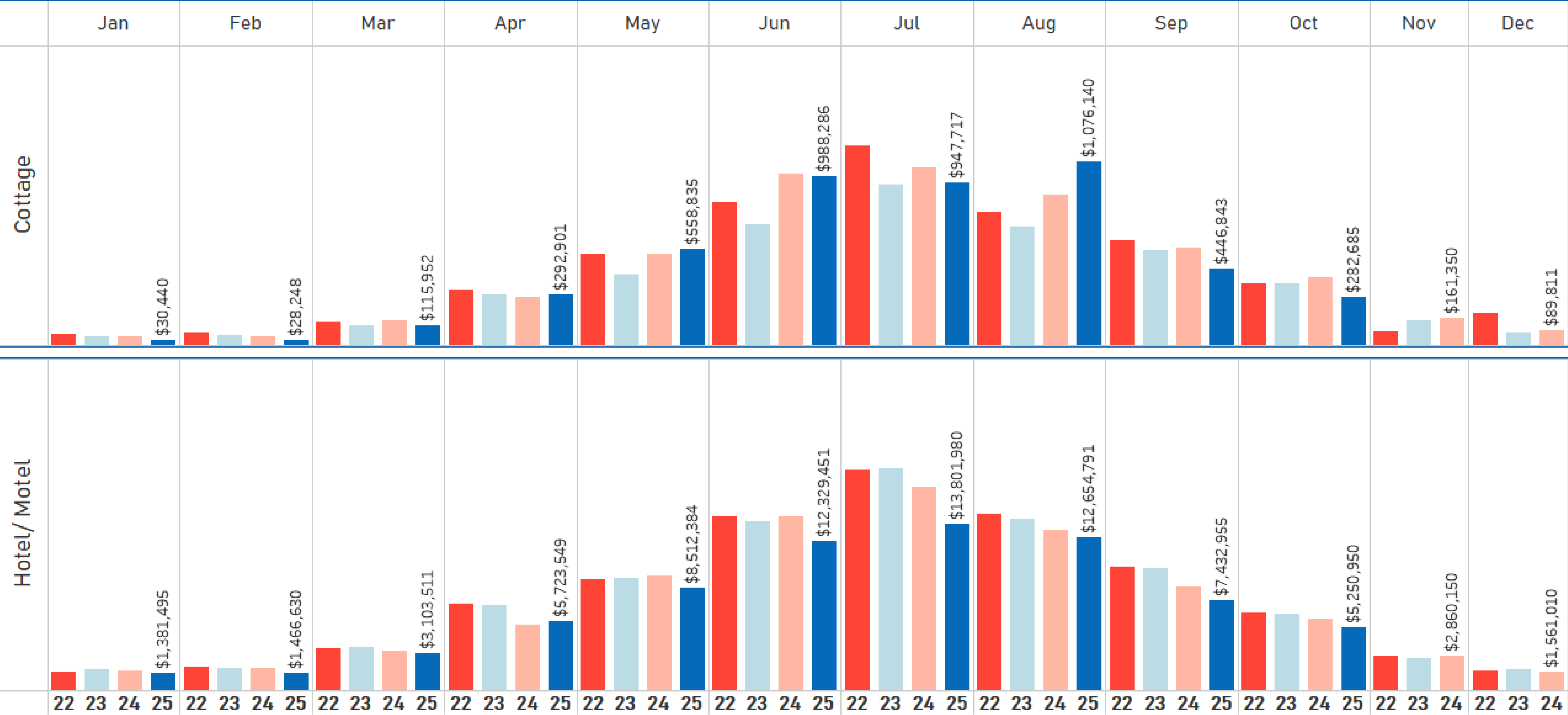
Outer Banks Total Occupancy by Class Collections Through October 2025

Source: Dare County Tax Office



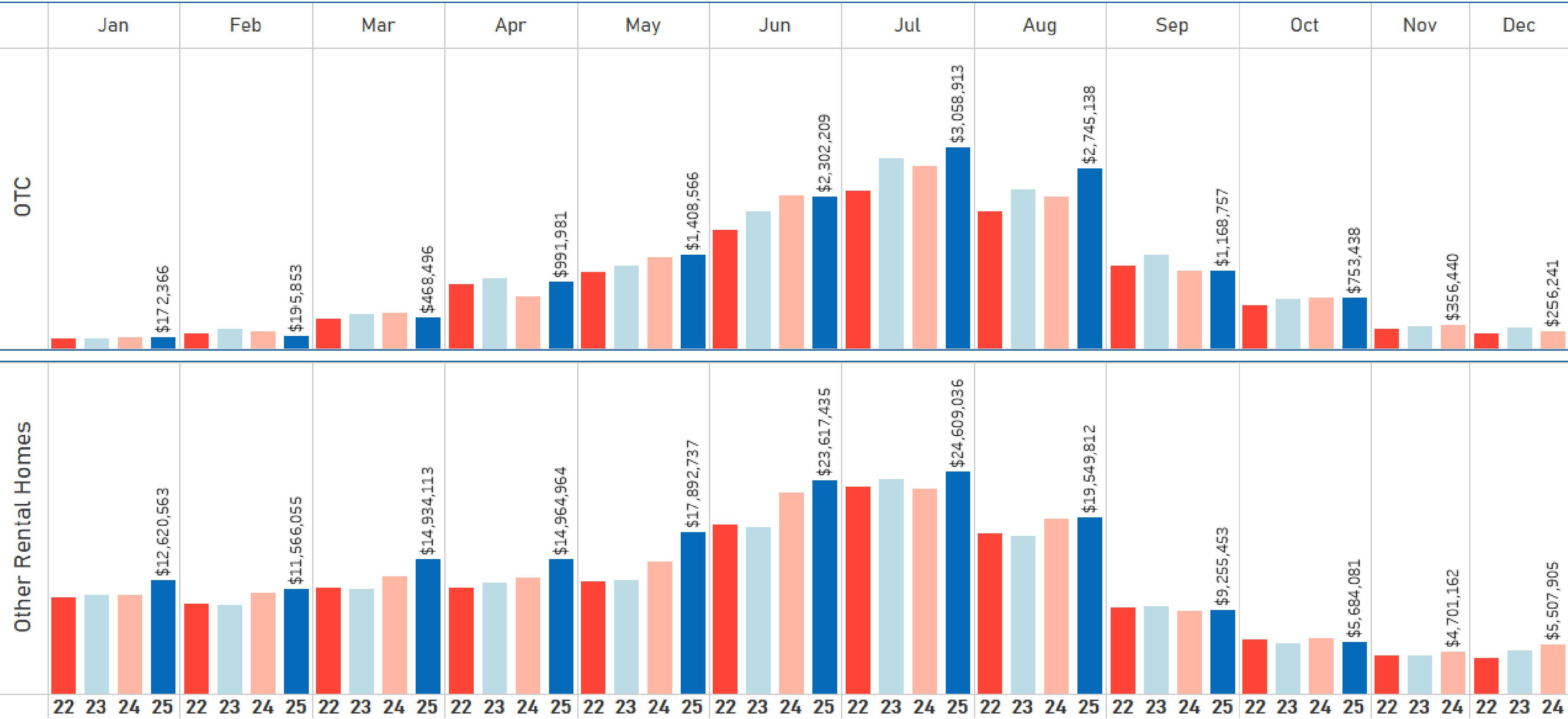
Outer Banks Total Occupancy by Class Collections Through October 2025

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Source: Dare County Tax Office



Outer Banks Total Occupancy by Class Collections Through October 2025

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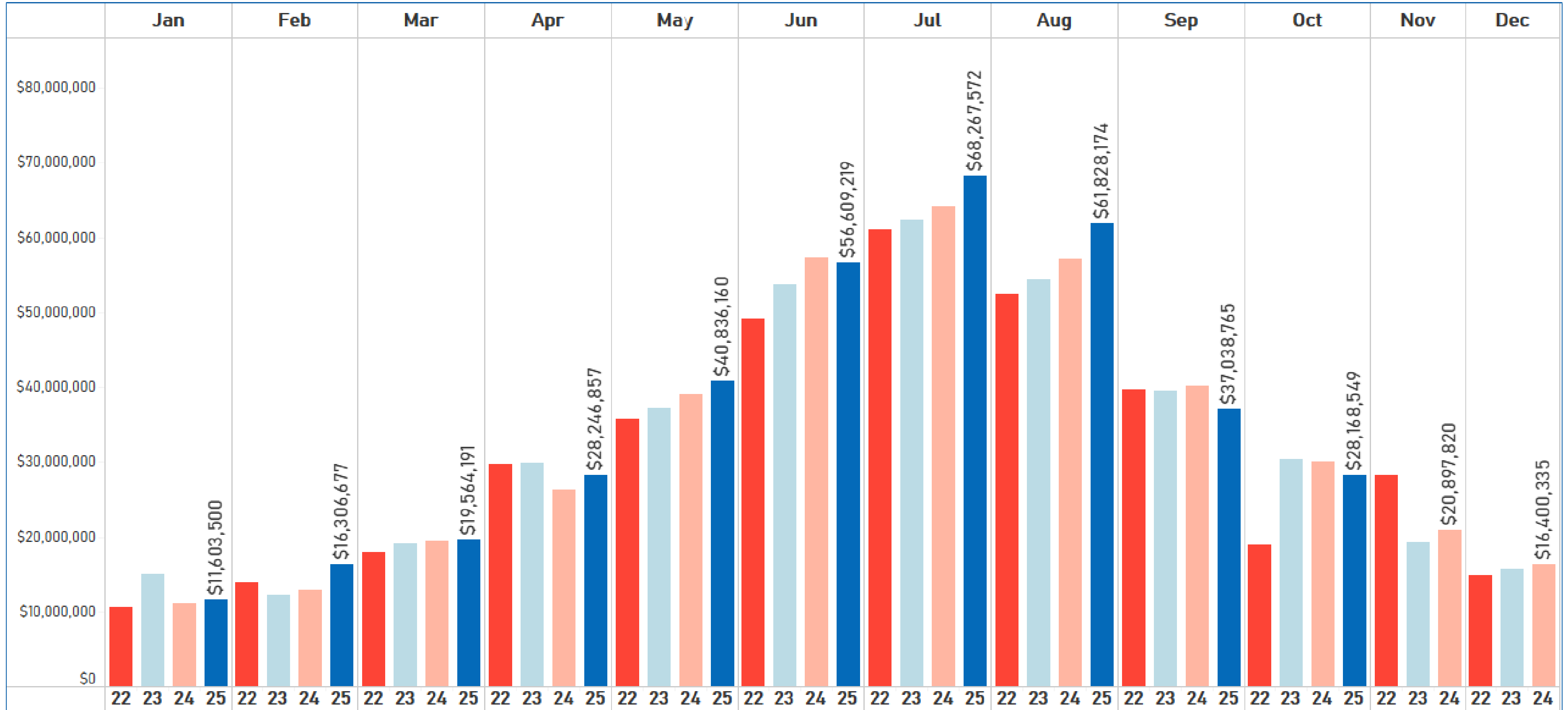


Total Collections by Month													
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Grand Total
2024	\$15,588,394	\$15,256,753	\$23,855,777	\$33,495,901	\$57,369,540	\$162,956,697	\$181,861,471	\$157,867,180	\$70,396,614	\$36,914,698	\$17,709,005	\$12,869,300	\$786,141,330
2025	\$16,704,519	\$15,106,523	\$23,315,703	\$39,811,889	\$67,926,280	\$145,610,175	\$187,476,603	\$162,043,637	\$63,541,209	\$32,586,097			\$754,122,635

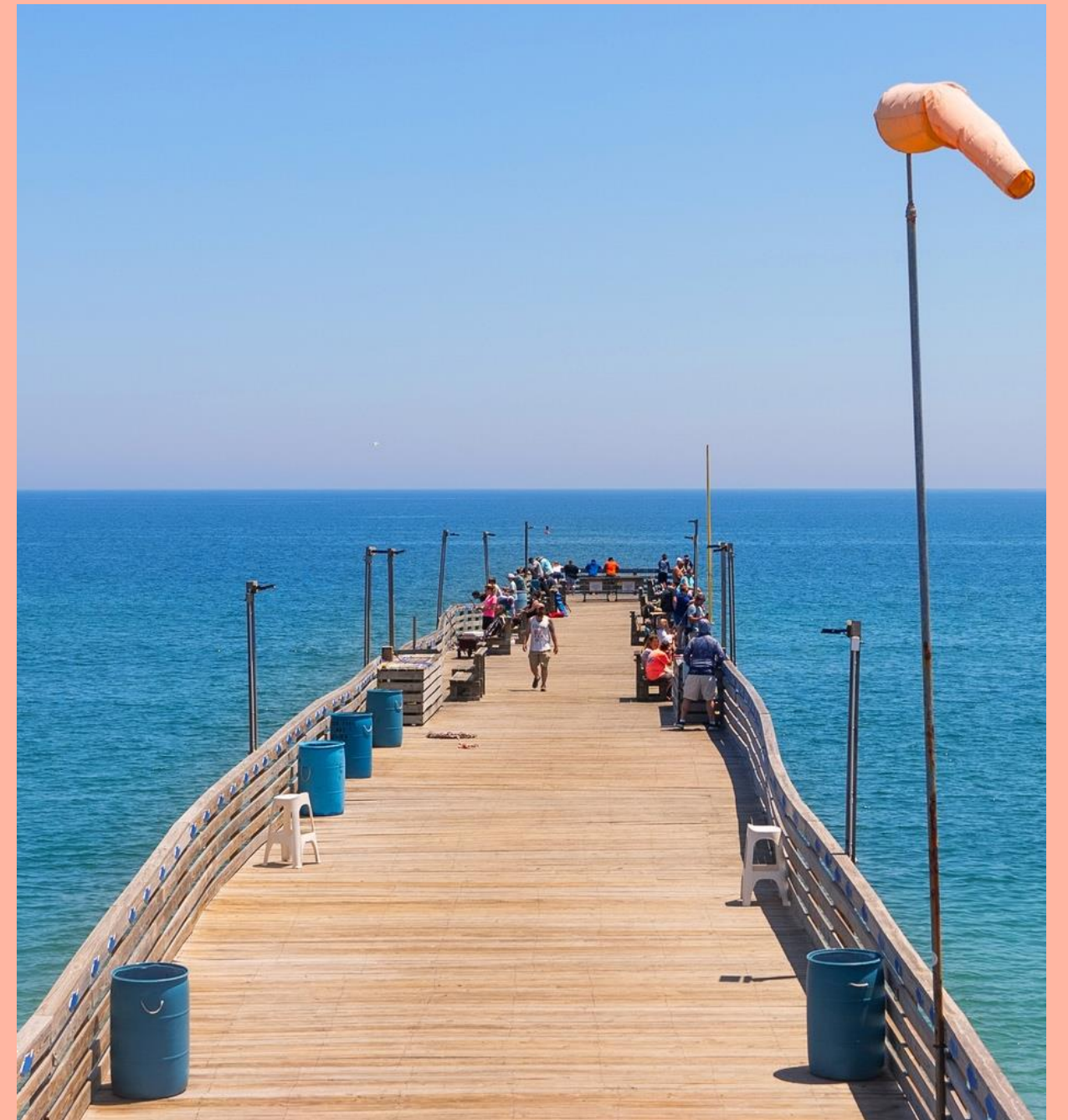
Monthly Collections by Class														
Bed & Breakfast	24	\$10,819	\$227,405	\$65,282	\$55,545	\$160,661	\$326,158	\$325,951	\$215,521	\$141,952	\$105,808	\$175,772	\$19,425	\$1,830,299
	25	\$15,970	\$27,896	\$104,135	\$163,901	\$136,494	\$366,804	\$306,173	\$207,441	\$100,985	\$149,704			\$1,579,503
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	\$345,057			\$4,563,303
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	\$282,685			\$4,768,047
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	\$5,250,950			\$71,657,696
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	\$753,438			\$13,265,717
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	\$5,684,081			\$154,694,249
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	\$20,099,679			\$501,068,173
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	\$20,503			\$2,525,947

Outer Banks Total Gross Meals Summary Collections Through October 2025

Source: Dare County Tax Office

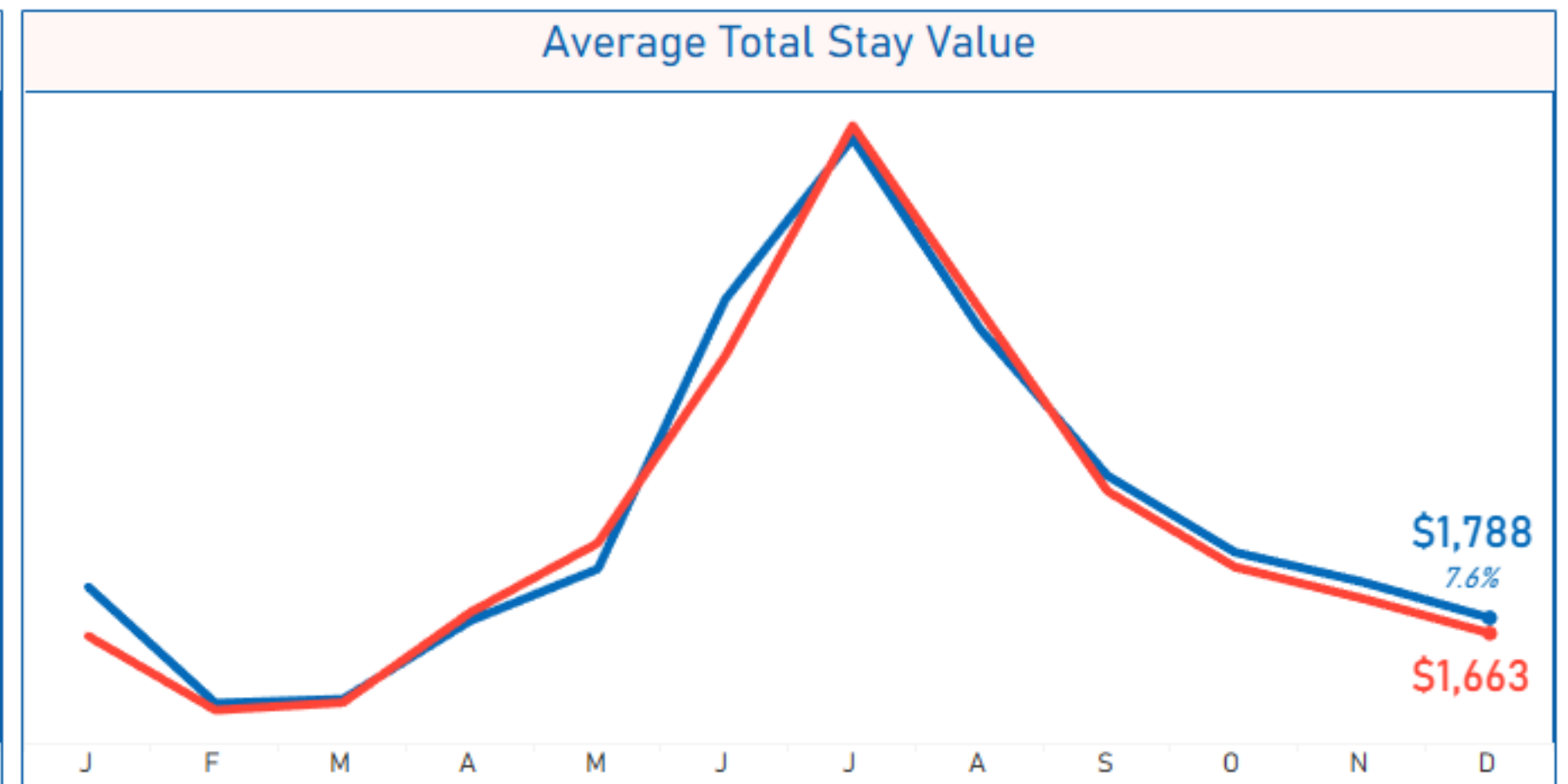
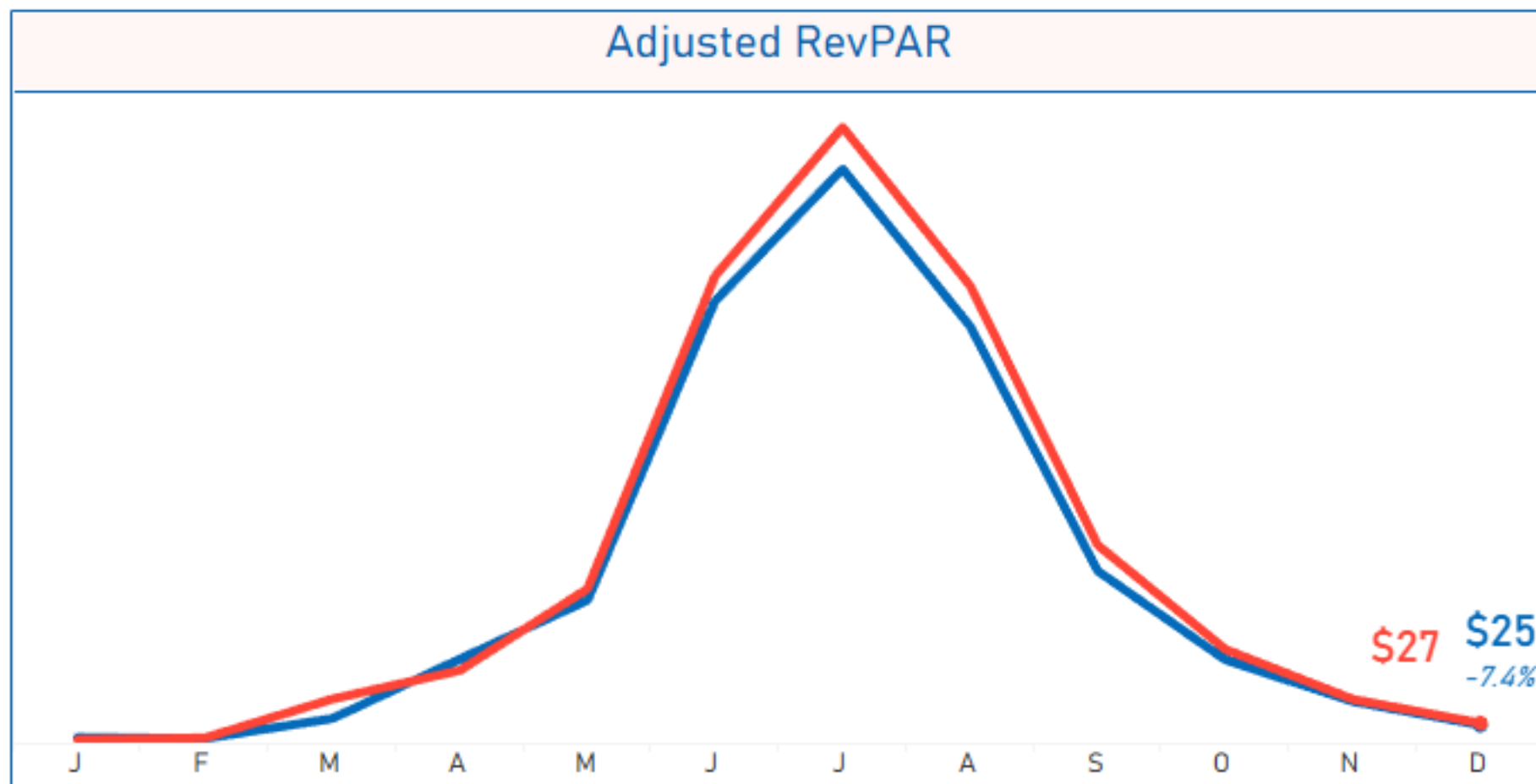
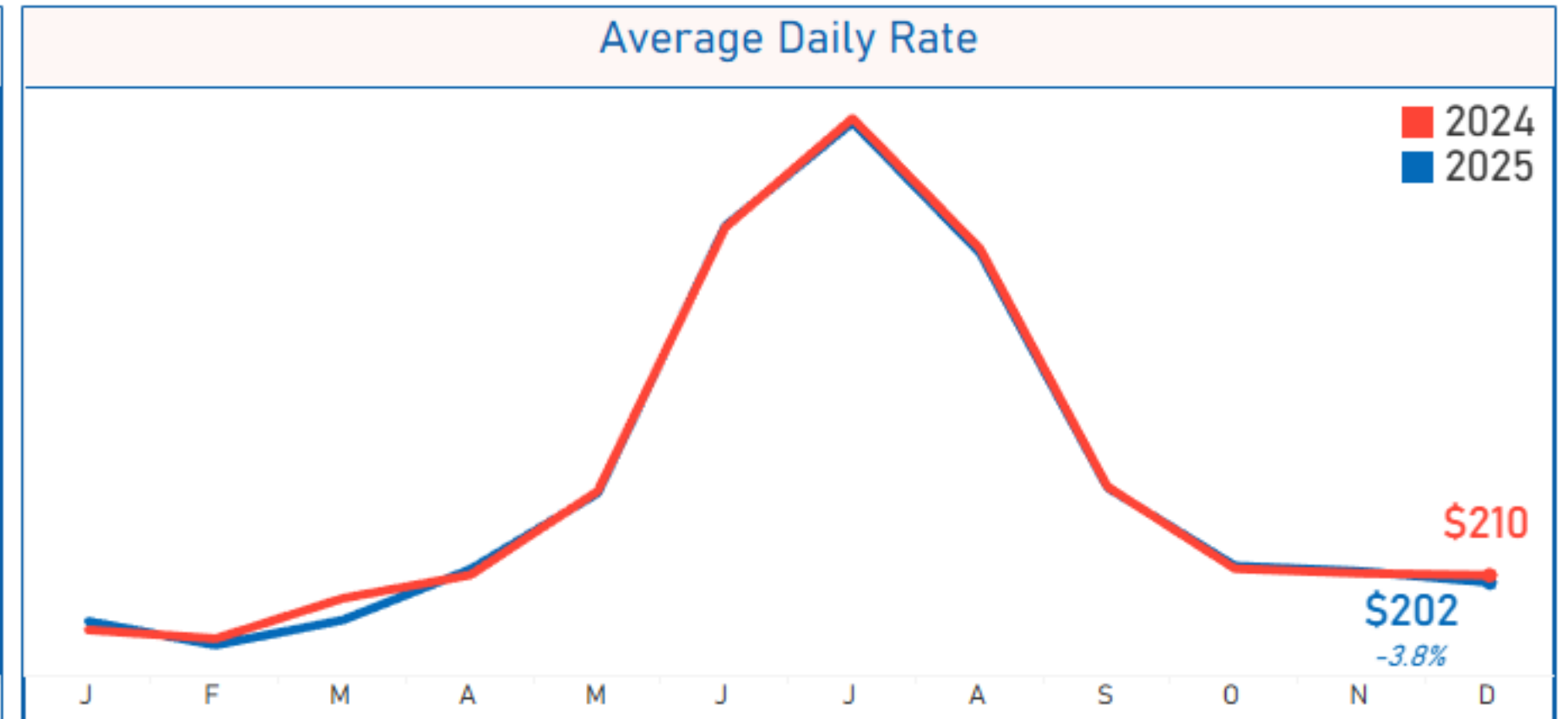
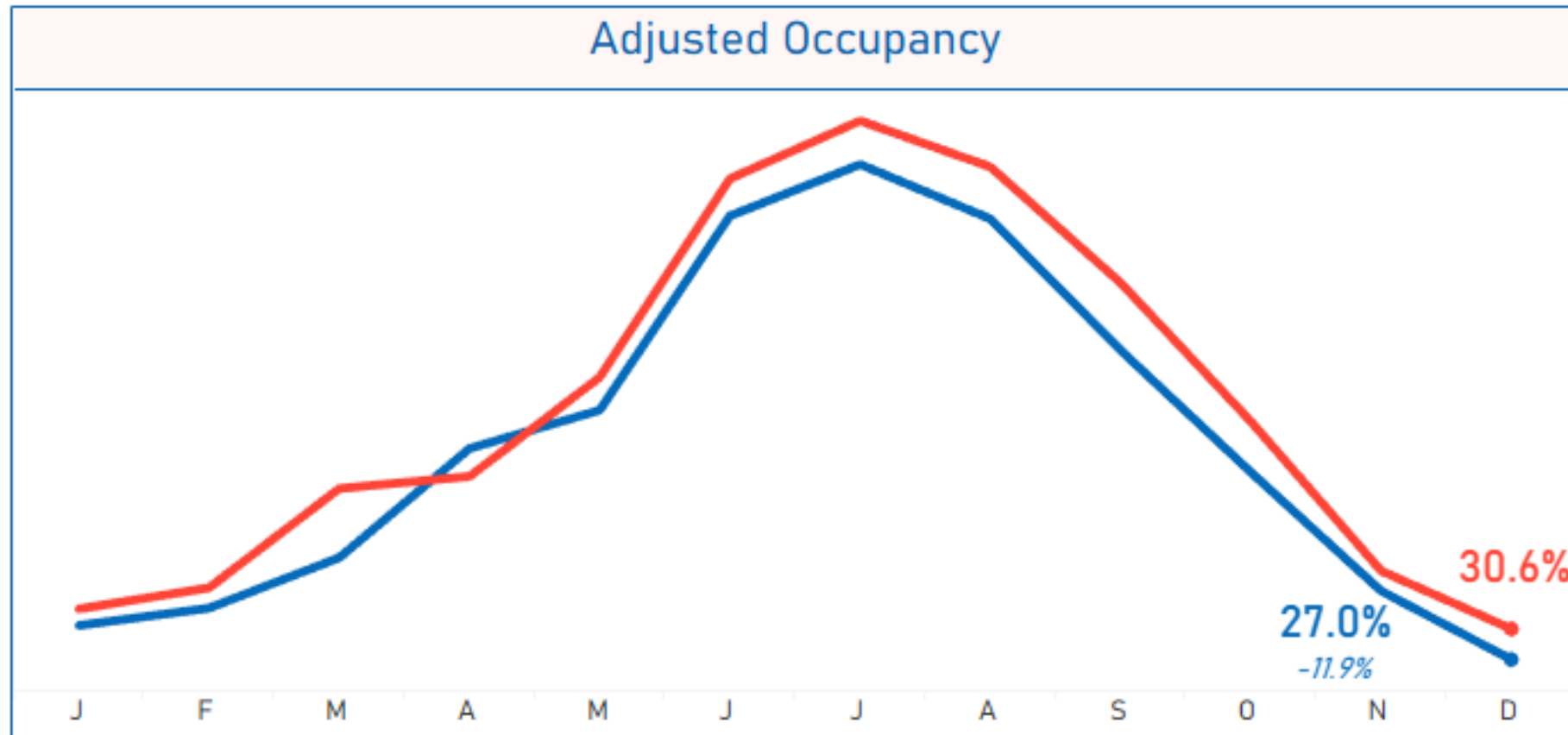


HISTORICAL SHORT-TERM RENTAL DATA



Dare County Monthly Short-Term Rental Performance December 2025

Source: KeyData

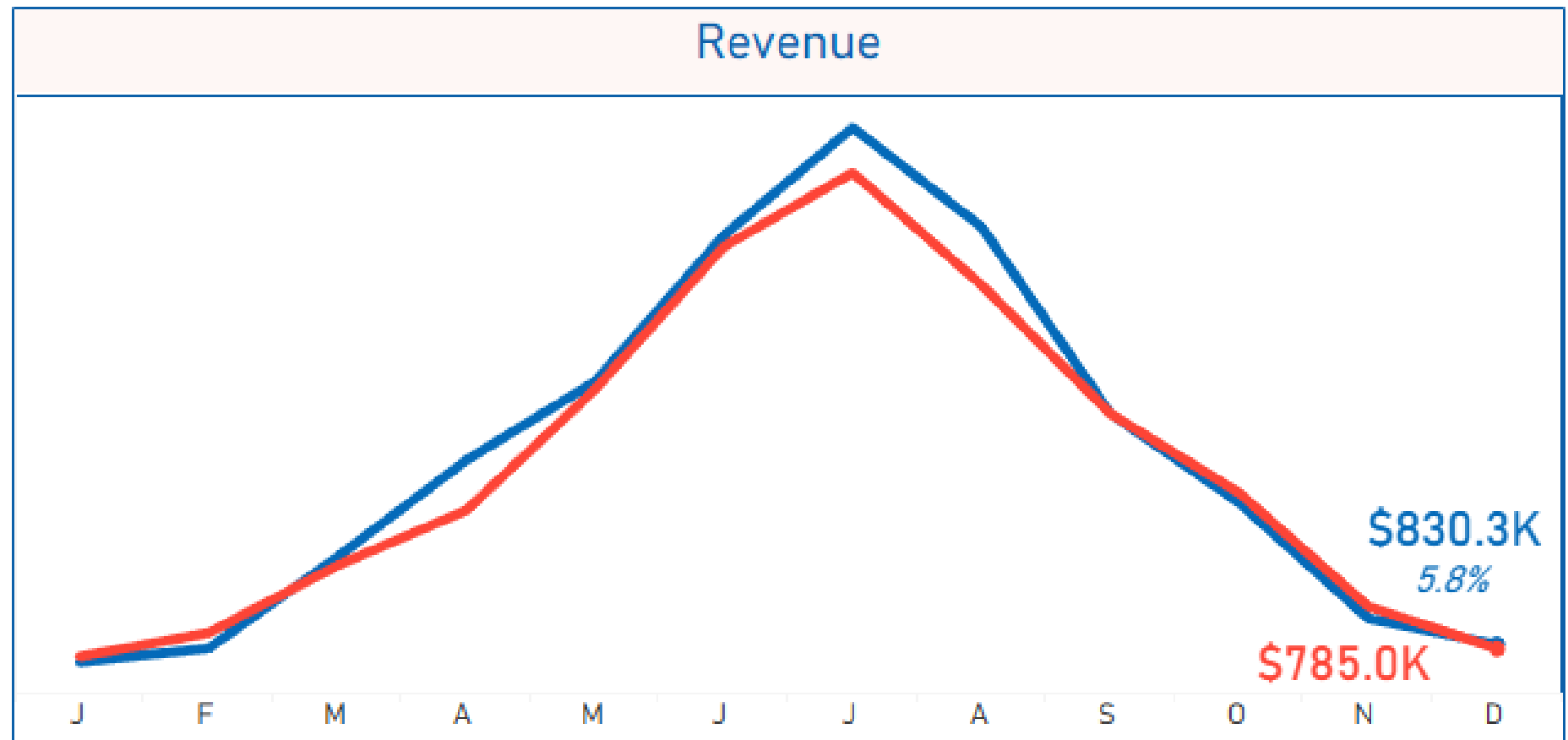
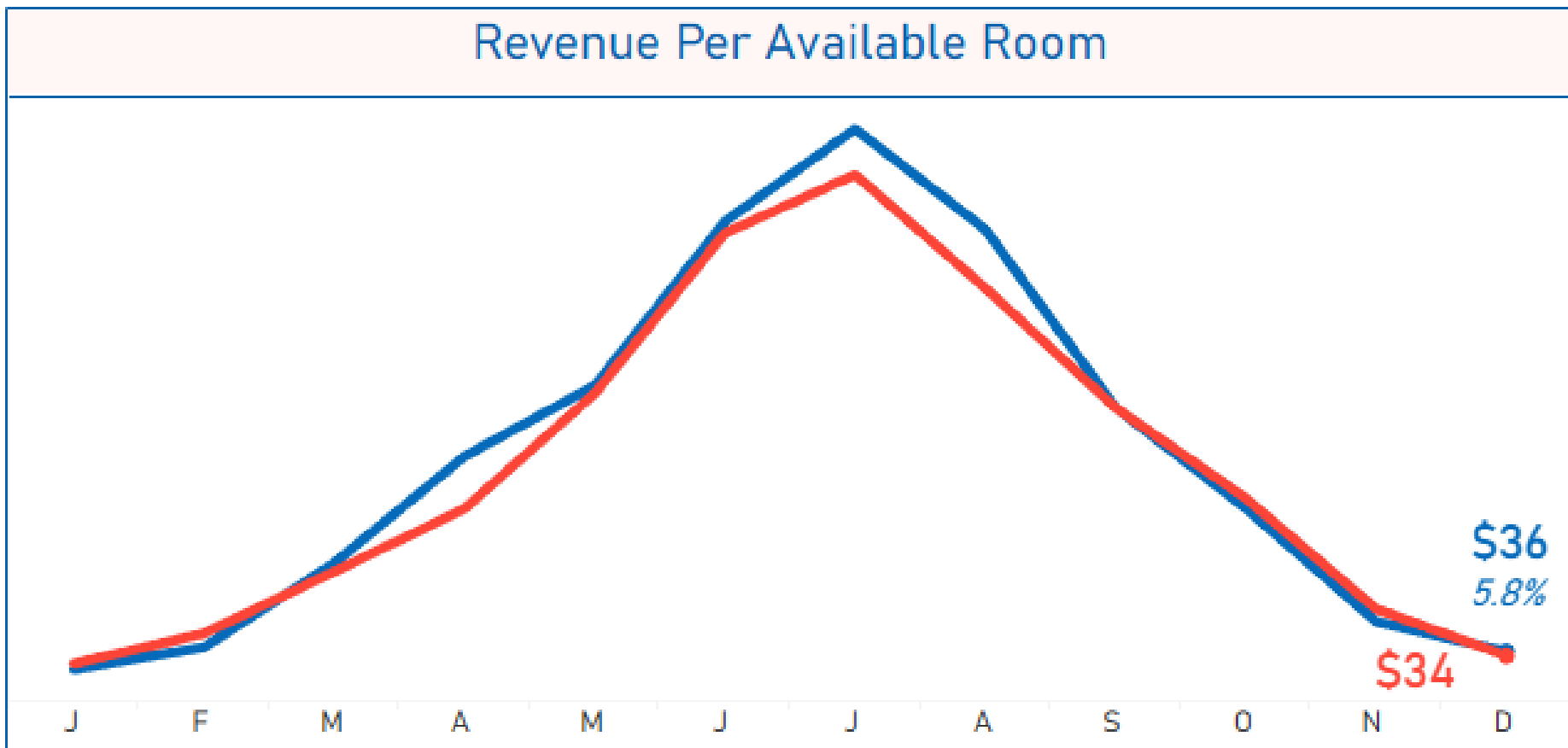
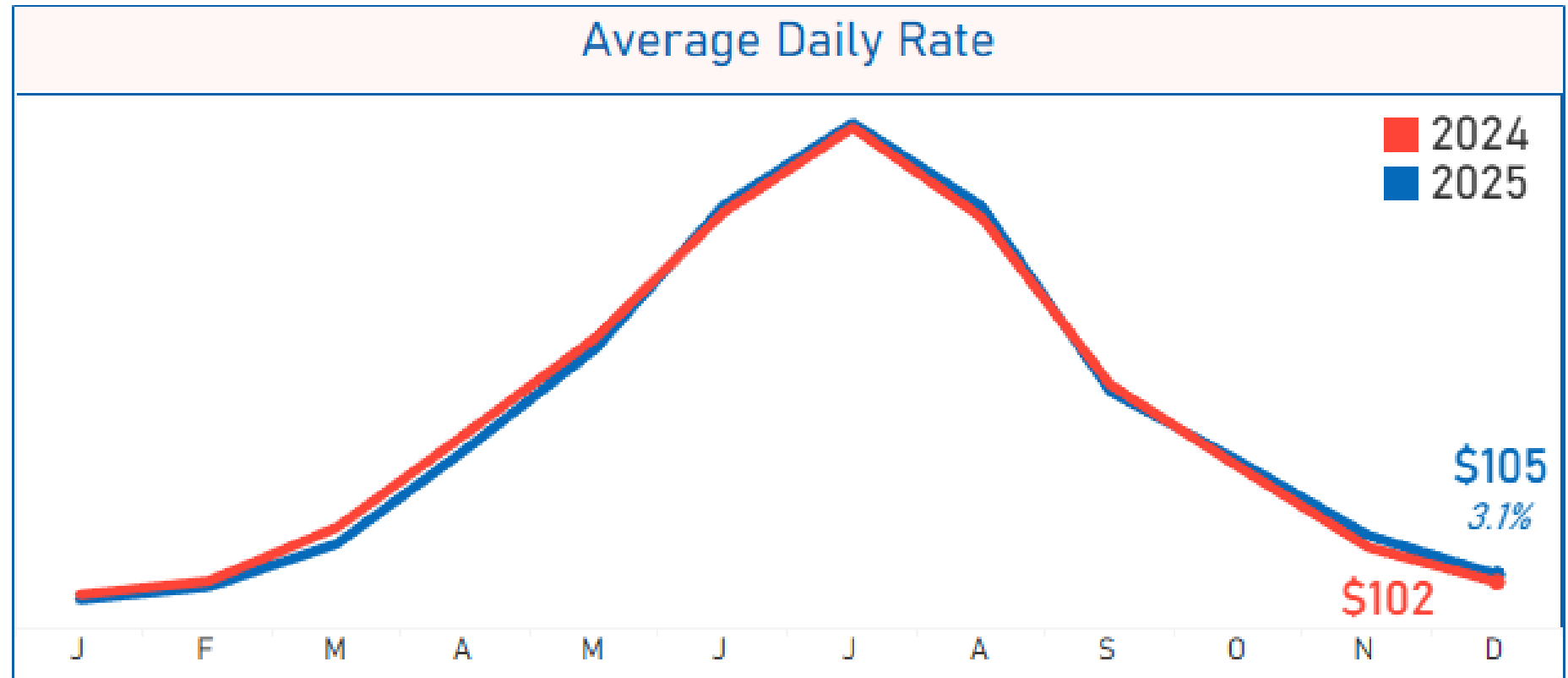
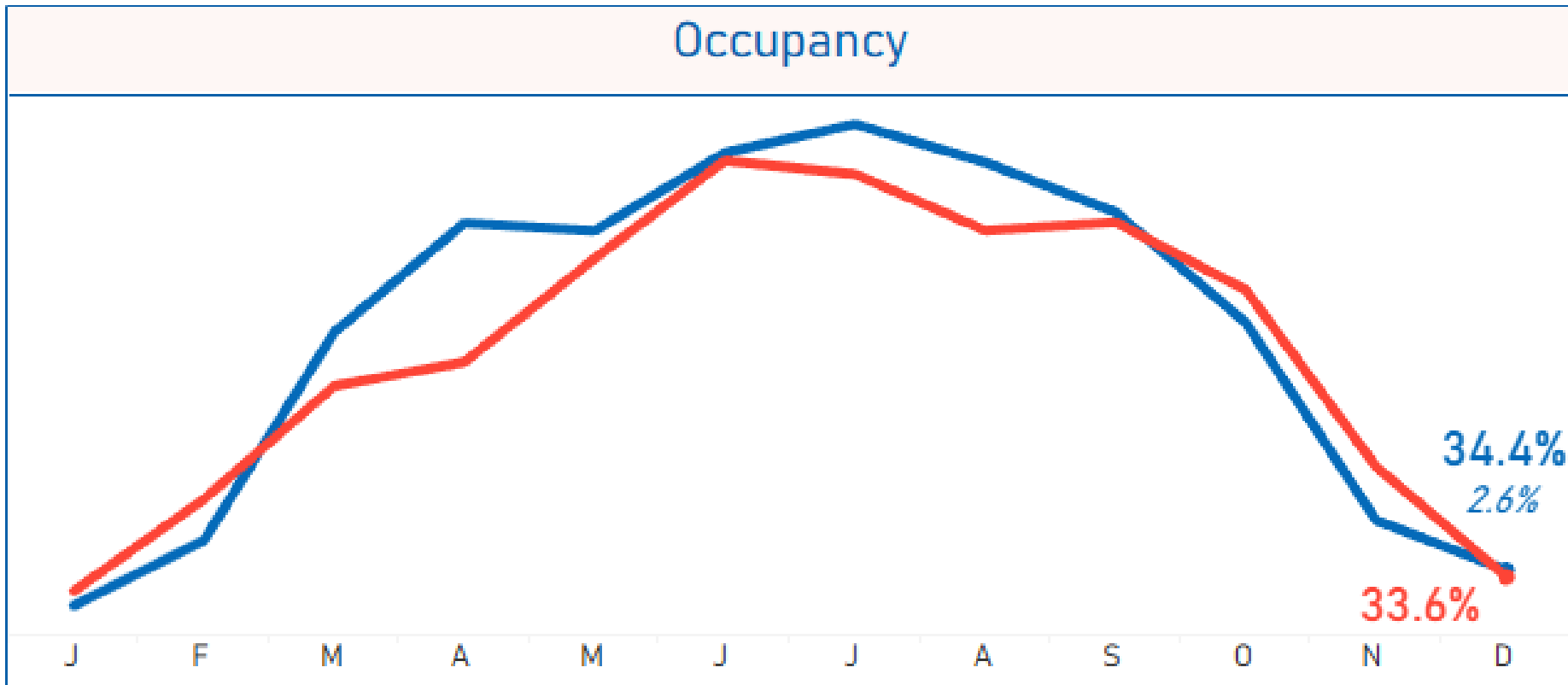


HISTORICAL HOTEL DATA

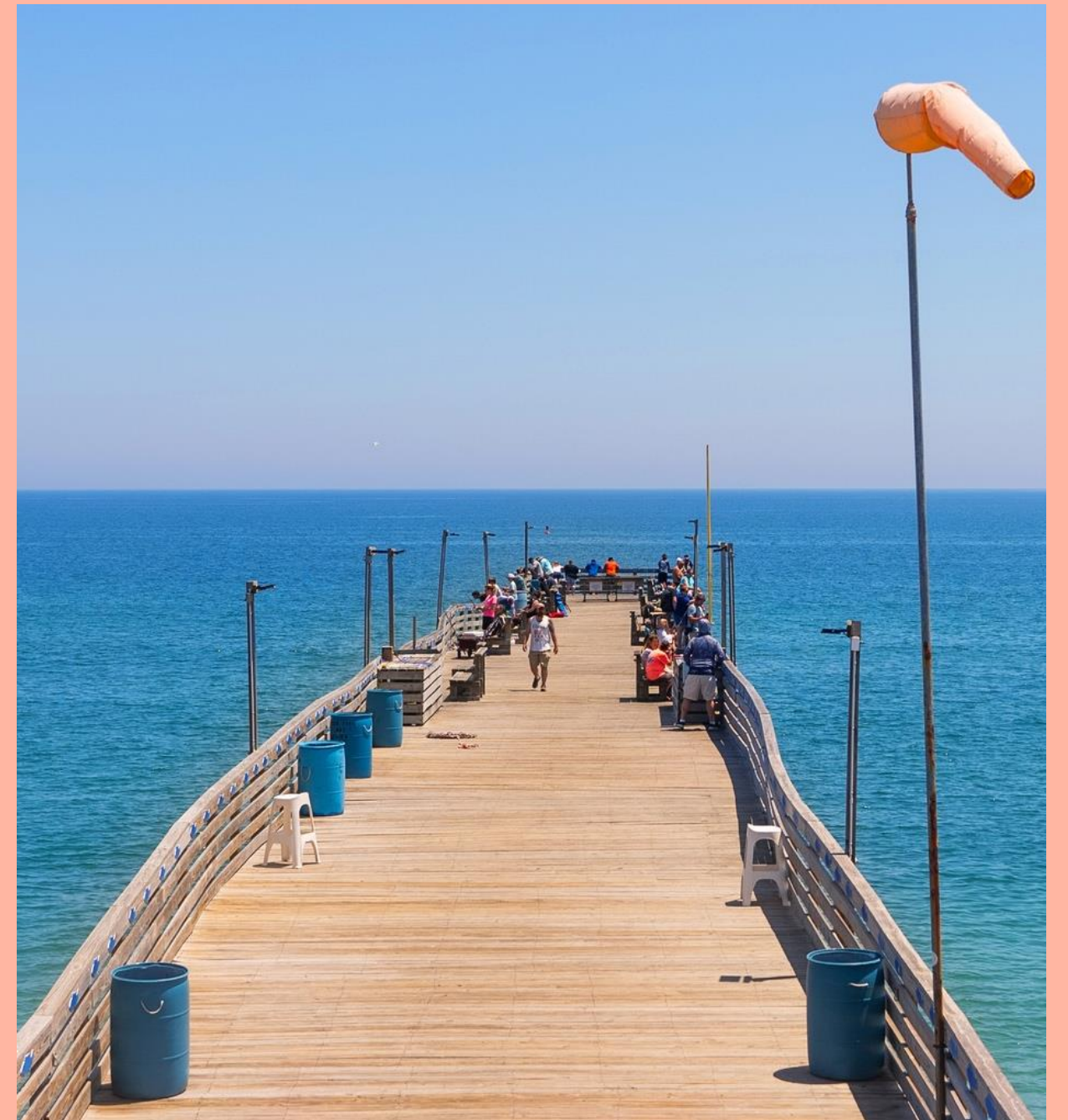


Dare County Monthly Hotel Performance December 2025

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



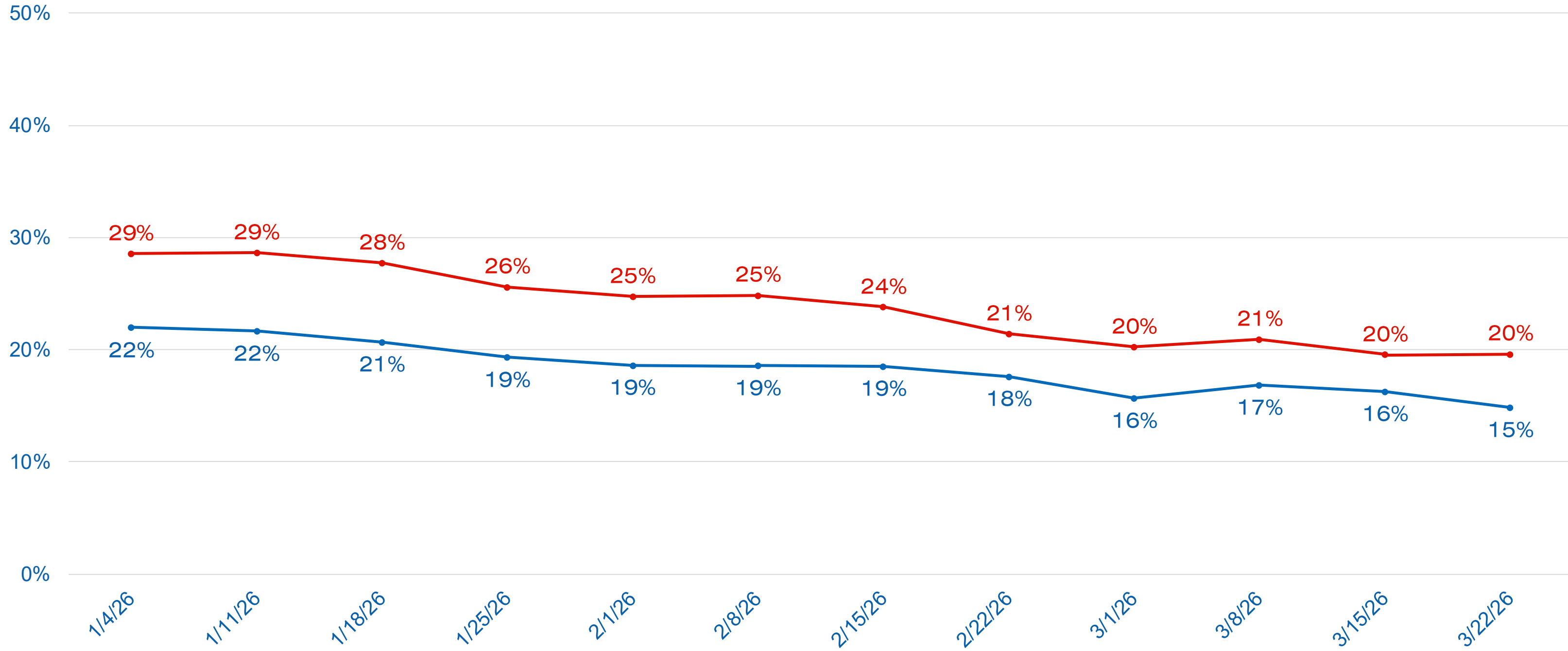
SHORT-TERM RENTAL PACING DATA



DARE COUNTY – PROJECTED OCCUPANCY BY WEEK

Pace by Week – Projected Occupancy (%)

—●— Current Year —●— Previous Year

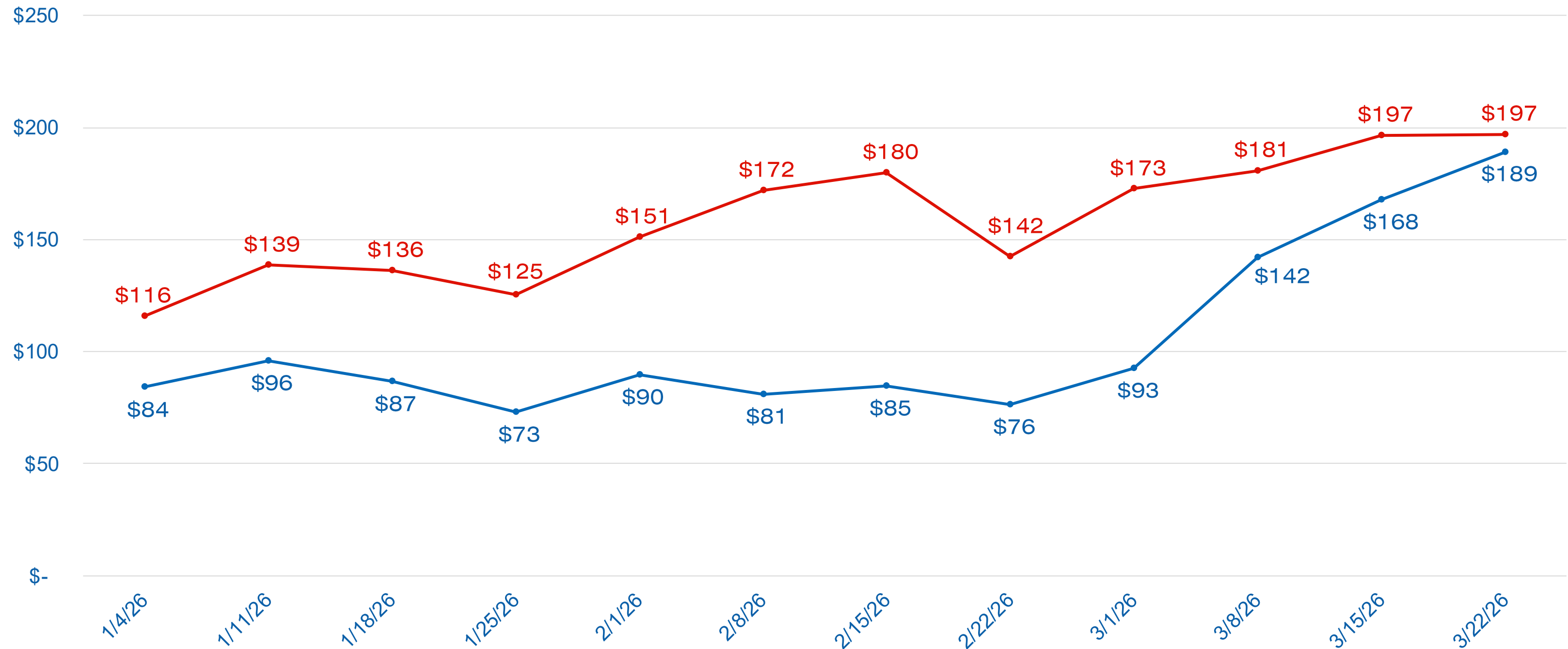


Source: Key Data (as of 1/8/2026)

DARE COUNTY – PROJECTED AVERAGE DAILY RATE

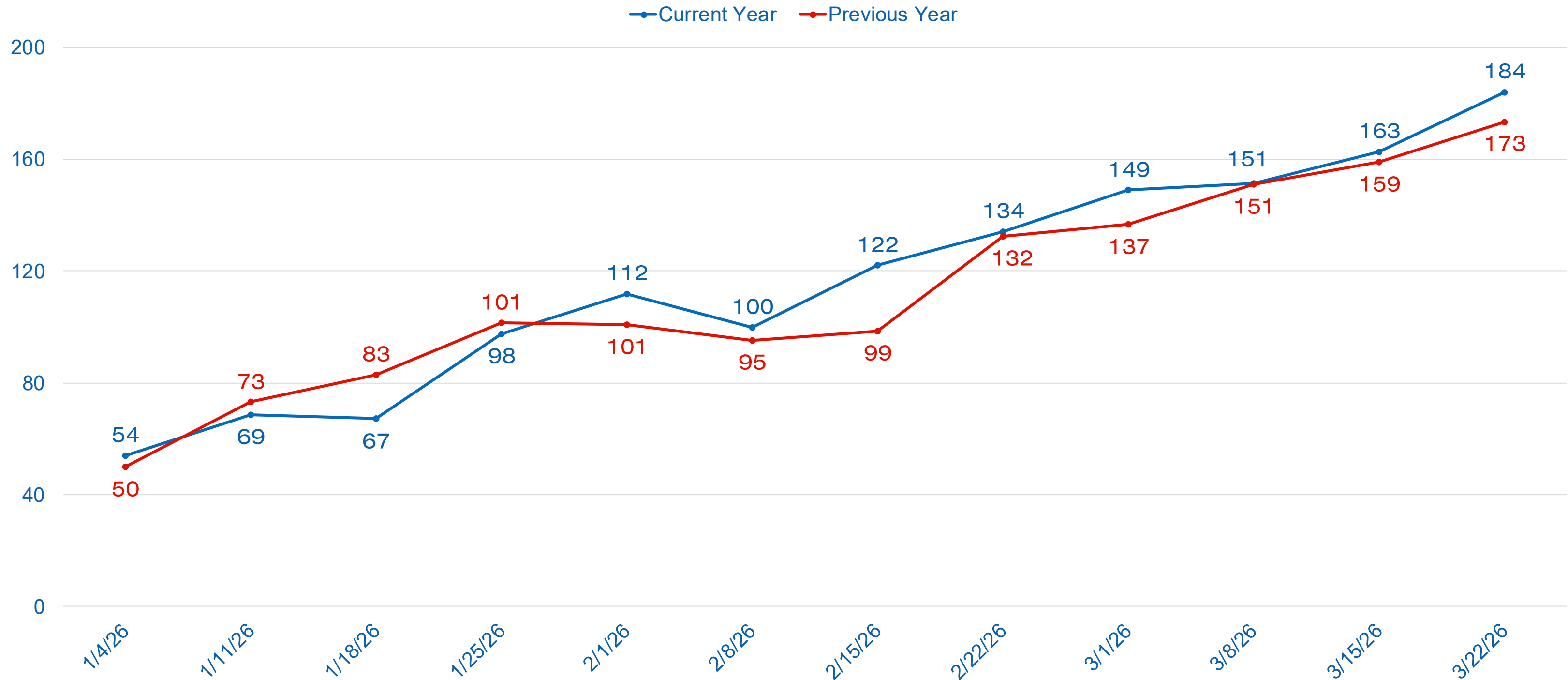
Pace by Week – Projected Average Daily Rate (\$)

—●— Current Year —●— Previous Year



DARE COUNTY – PROJECTED AVERAGE BOOKING WINDOW (DAYS)

Pace by Week – Projected Average Booking Window (Days)



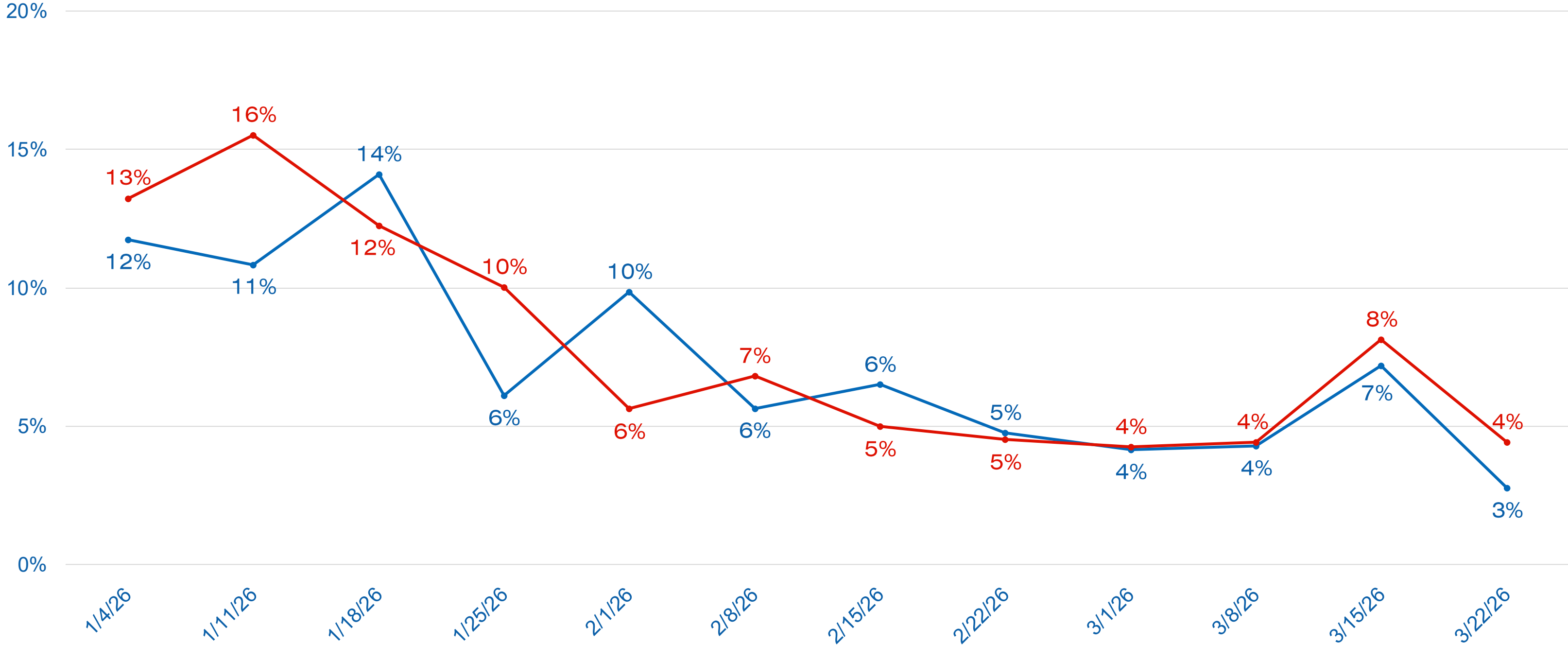
HOTEL PACING DATA



DARE COUNTY HOTELS – PROJECTED OCCUPANCY

Pace by Week – Projected Occupancy (%)

—●— Current Year —●— Previous Year

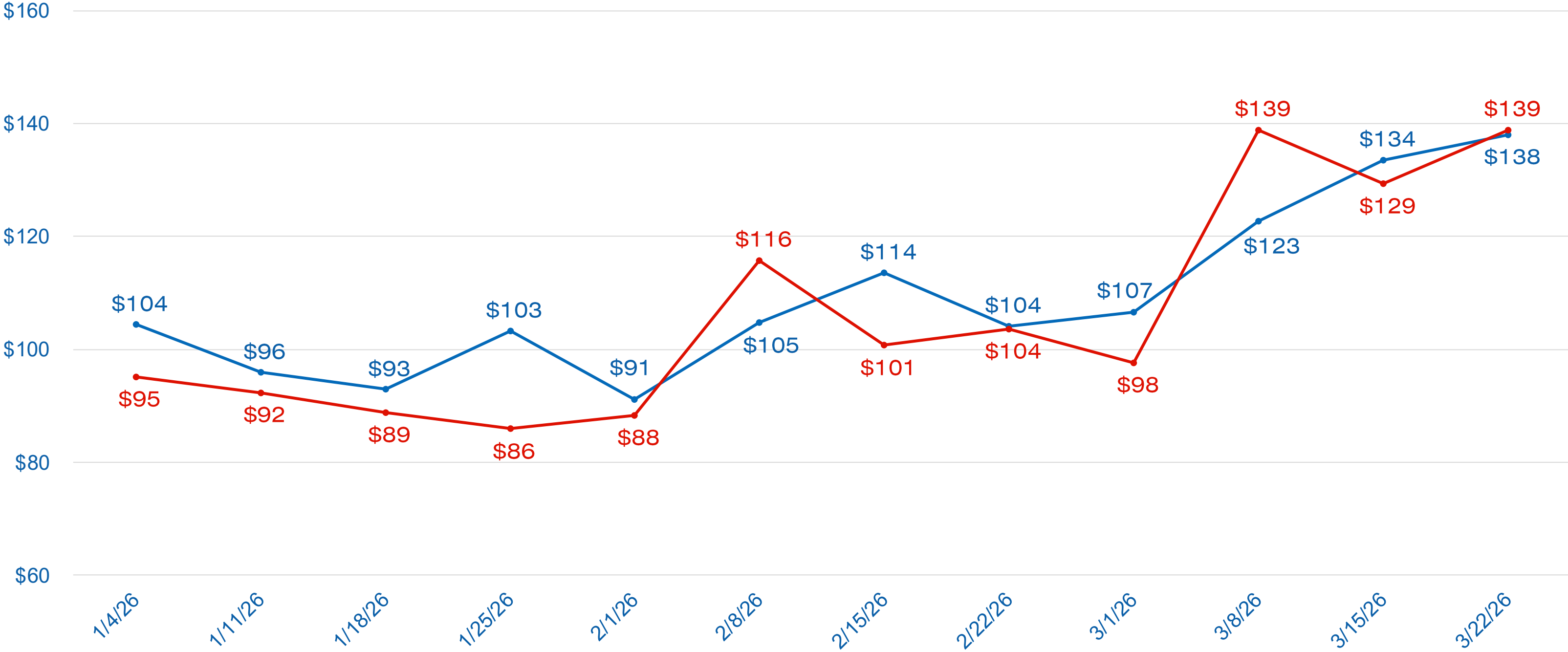


Source: Key Data (as of 1/8/2026, Sample = 12 hotels, 1,496 rooms)

DARE COUNTY HOTELS – AVERAGE DAILY RATE

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

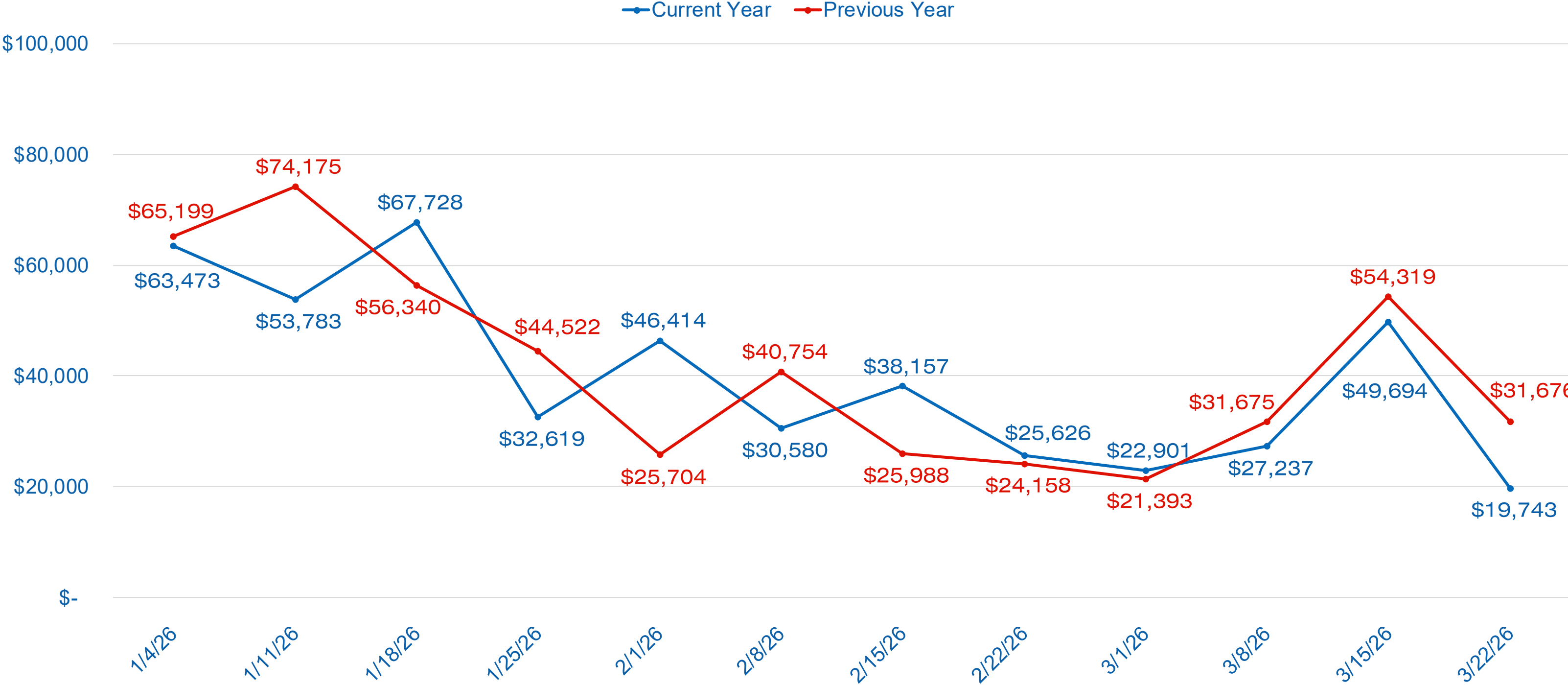
— Current Year — Previous Year



Source: Key Data (as of 1/8/2026, Sample = 12 hotels, 1,496 rooms)

DARE COUNTY HOTELS – REVENUE

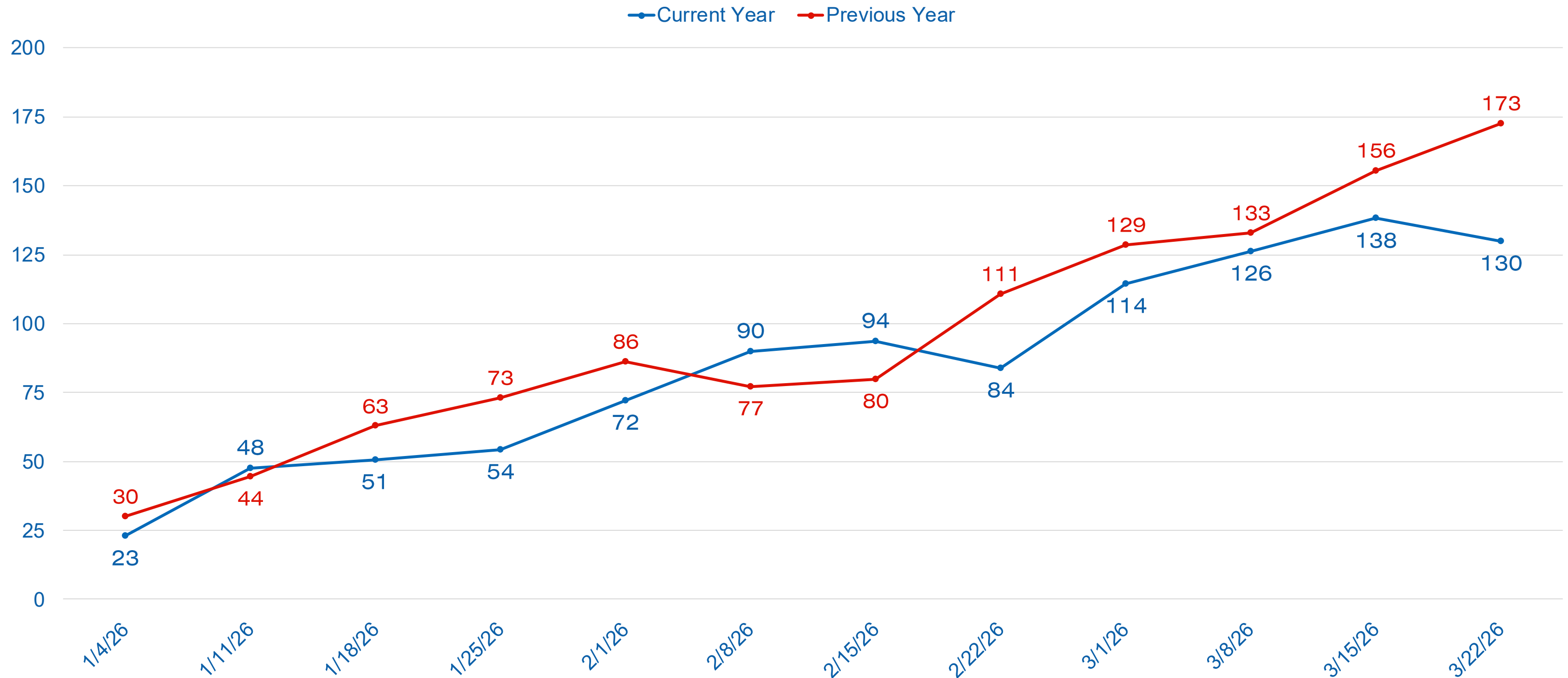
Pace by Week – Projected Revenue (\$)



Source: Key Data (as of 1/8/2026, 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 1/8/2026, Sample = 12 hotels, 1,496 rooms)

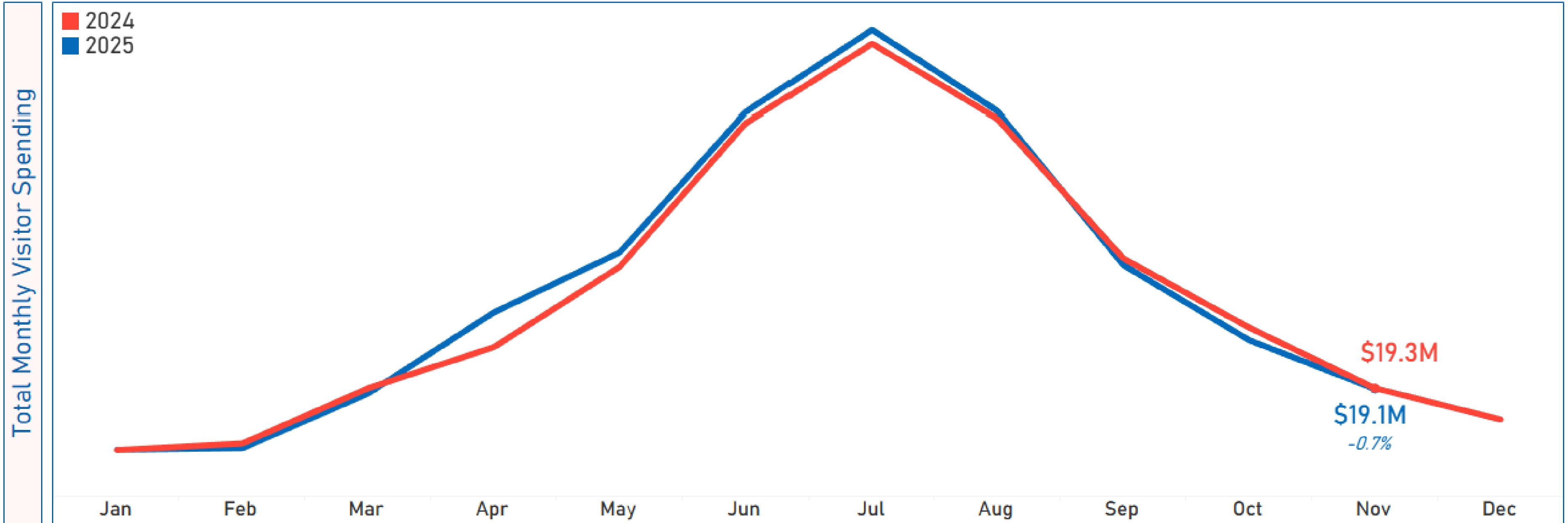
VISA DESTINATION INSIGHTS



Outer Banks Monthly Visitor Spending November 2025

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

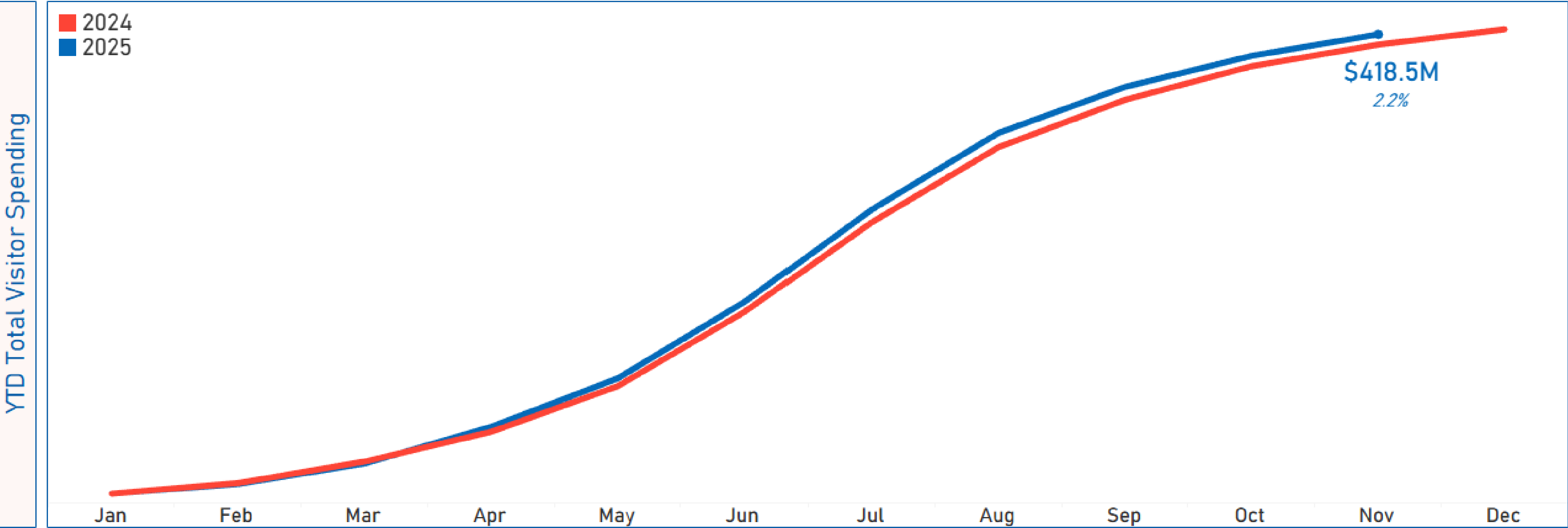
YOY Nov '25	Domestic Visitor		International Visitor		Visitor Grand Total	
	Spend Amount	Card Count	Spend Amount	Card Count	Spend Amount	Card Count
		\$19,011,191	102,887	\$104,550	390	\$19,115,741
	-0.7%	-5.1%	-10.3%	-26.7%	-0.7%	-5.2%



Outer Banks Monthly Visitor Spending Calendar YTD Through November 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
	\$415,421,965	2,069,236	\$3,068,488	12,800	\$418,490,454	2,082,036
YOY	2.6%	0.8%	-32.5%	-26.3%	2.2%	0.6%



Outer Banks Monthly Visitor Spending

Top Domestic Origin Markets – November 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	\$4,012,579		-0.4%	24,590	-5.7%
Washington-Arlington-Alexandria, DC-VA-MD-WV	\$2,130,737		-4.1%	9,711	-5.9%
Richmond, VA	\$1,585,395		2.4%	8,218	1.4%
Raleigh-Cary, NC	\$794,612		-7.3%	4,902	-12.0%
Elizabeth City, NC	\$660,137		3.2%	5,129	1.7%
Charlotte-Concord-Gastonia, NC-SC	\$459,939		4.9%	2,334	-1.4%
Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	\$442,627		9.7%	2,117	11.9%
Baltimore-Columbia-Towson, MD	\$442,623		-8.8%	2,095	-7.7%
New York-Newark-Jersey City, NY-NJ-PA	\$338,310		0.1%	1,744	-5.7%
Durham-Chapel Hill, NC	\$283,758		2.5%	1,607	-5.5%
Winston-Salem, NC	\$245,666		-1.9%	1,216	-14.7%
Charlottesville, VA	\$213,949		-0.4%	1,012	-9.2%
Greenville, NC	\$191,222		-3.6%	1,467	-7.4%
Greensboro-High Point, NC	\$185,999		-16.5%	1,057	-17.9%
Salisbury, MD-DE	\$181,997		19.4%	840	6.7%

DIGITAL MARKETING METRICS



Outer Banks Visitors Bureau

FY25-26 Paid Media

December 2025 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.

December 2025 Highlights

- **Paid Media:** FY-to-date video views are up 28%, and impressions are up 16% compared to the same time frame in FY24-25. This month, impressions were down 36% YoY, primarily due to earlier Spring-Summer launch dates in 2024.
 - Spring-Summer: The campaign officially launched on 12/1 with Streaming Video (YouTube Shorts), followed by Streaming TV (Hulu, NBC-Peacock, and Perion) the week of 12/15. All remaining tactics are scheduled to go live in January in alignment with the new Outer Edge videos.
 - Continuity:
 - The Native makegood ran in December, resulting in a spike in overall delivery. Native supported Shop OBX, Travel Packages, Wellness & Spas, Winter Skies, and OBXmas. Travel Packages earned the highest clickthrough rate at 0.38%. Those in the Travel & Niches audience who viewed the OBXmas creative spent the most time on the website at 1 minute and 9 seconds.
 - *Note: All paid media was paused from 12/8-12/11 to ensure all clickthrough links were updated to the new OBX website links.*
- **Website:** Total monthly sessions were down 32% YoY across all sources. Google Organic Search made up the majority of traffic at 25%, followed by Google Paid Search at 19%.
 - The /listing/ page saw the largest volume growth at +1.5K or +6%. Google Paid Search drove the majority of traffic to the Jennette's Pier landing page.
- **Email:** 97K emails were sent across consumer marketing contact sublists and various workflows, achieving an overall 15% open rate, 9% CTR (opens), and a 0.72% bounce rate.
 - The December 2025 OBX email "Happy Holidays from the OBX" was sent out using the new email template and received an overall 15% open rate and 8% CTR (opens). An A/B test was conducted to evaluate subject line effectiveness, but there was no clear winner as both subject lines achieved a near-15% open rate. The View the OBXmas Event List CTA button received the most clicks at 39%, followed by the Explore Travel Specials CTA at 22%.
 - *Note: The family workflow audience was intentionally excluded from this send to minimize message frequency and ensure they received the seasonal family email. This explains the reduced send volume for the month.*
 - A seasonal Family email titled "Unwrap Family Memories on the OBX" was also sent out to members of the family workflow. This earned a 14% open rate and 10% CTR (opens), with most clicks going to the Explore Travel Specials CTA (29%) and the See Event Details link within the Upcoming Events section (12%).
 - Among workflows, the Foodie workflow performed the best, achieving a 30% open rate and 39% CTR (opens)!

Dashboard was updated on 1/8/26. Data is reviewed and validated through - Media, Email, and Website: 12/31/25.

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

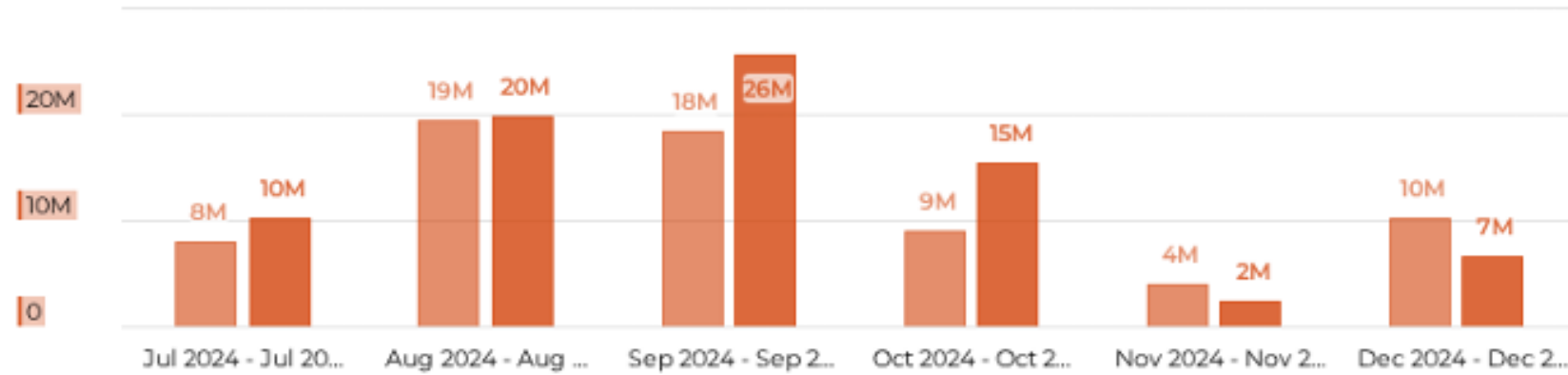
delivery trends

FYTD: Impressions

79,923,202
▲ 16.20% (11,142,622)

Monthly Impressions Delivered vs. Previous Year

Impressions

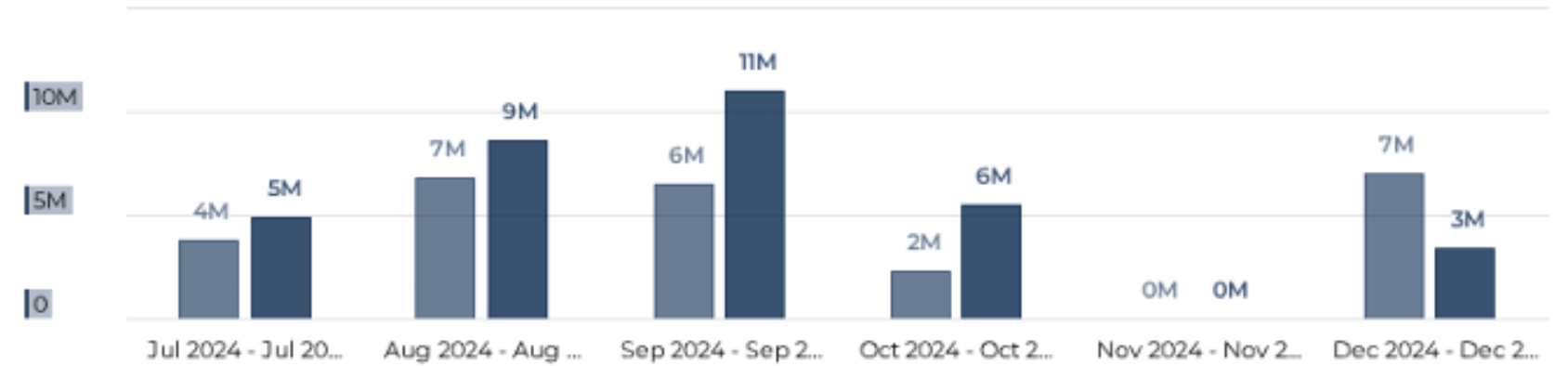


FYTD: Video Views

33,528,766
▲ 27.38% (7,207,559)

Monthly Video Views Delivered vs. Previous Year

Video Views

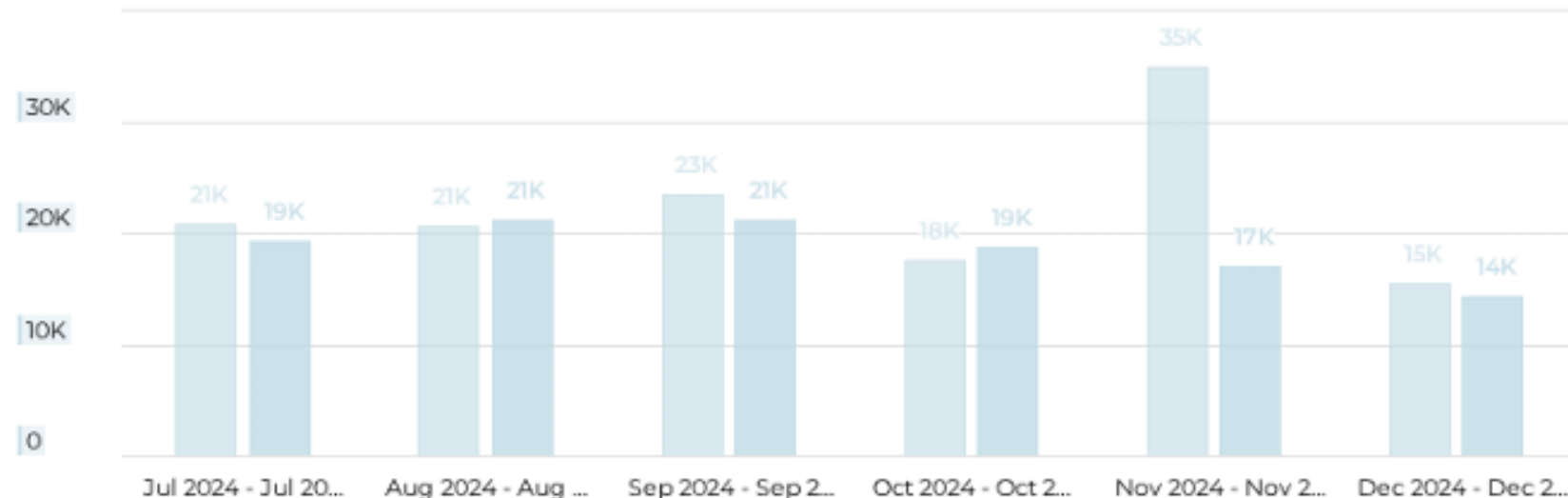


FYTD: Email Opens

111,387
▼ -15.97% (-21,172)

Monthly Email Opens v. Previous Year

Email Opens

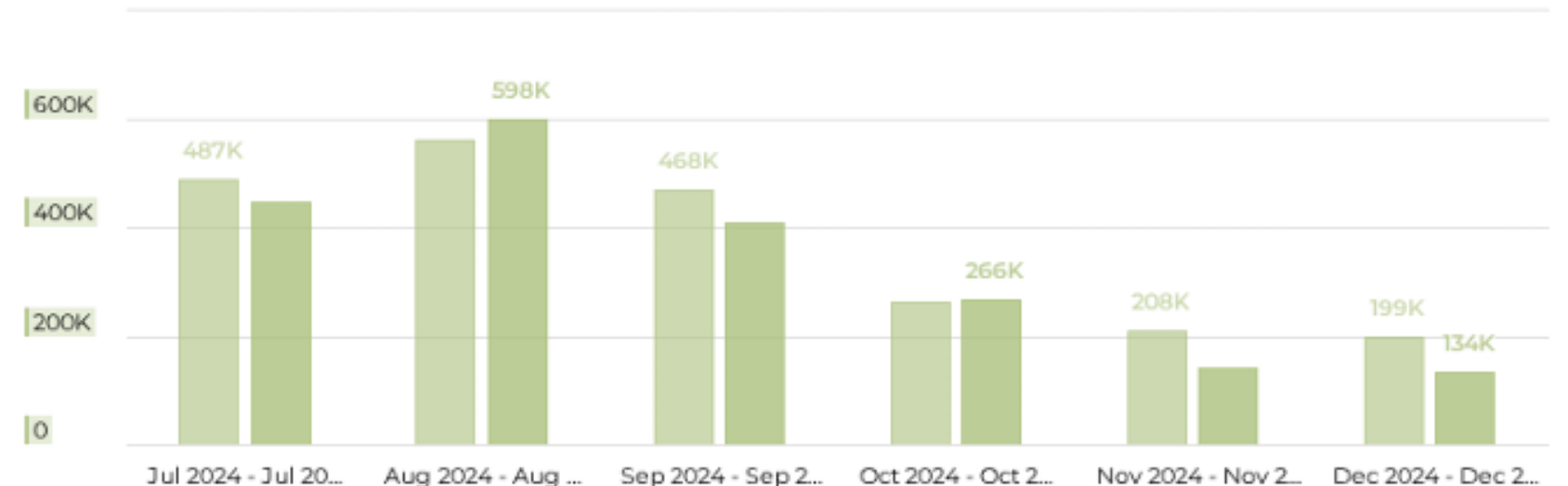


FYTD: Website Sessions

1,995,009
▼ -8.73% (-190,899)

Monthly Website Sessions v. Previous Year

Sessions





Executive Summary

Drive Awareness

KPI: Impressions

Performance As Of:	Dec 2025	Dec 2024	Base Goal	Stretch Goal
Current Month	2,439,423	1,330,183	3,229,058	4,368,725
Cumulative Fiscal	22,435,767	17,481,227	23,787,497	32,183,084
Cumulative % To Target		128%	94%	70%

Drive Intent

KPI: Website Sessions Referred by Social Sources

Performance As Of:	Dec 2025	Dec 2024	Base Goal	Stretch Goal
Current Month	25,534	10,403	32,980	40,120
Cumulative Fiscal	174,788	116,486	173,665	211,262
Cumulative % To Target		150%	101%	83%

Engage

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

Performance As Of:	Dec 2025	Dec 2024	Base Goal	Stretch Goal
Current Month	185,681	82,381	183,828	224,679
Cumulative Fiscal	1,369,880	693,713	1,266,648	1,548,125
Cumulative % To Target		197%	108%	88%

Convert

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

Performance As Of:	Dec 2025	Dec 2024	Base Goal	Stretch Goal
Current Month	1,080	319	693	810
Cumulative Fiscal	10,095	6,229	6,561	7,664
Cumulative % To Target		162%	154%	132%

Key Messaging:

- 2025 in review

Performance Overview:

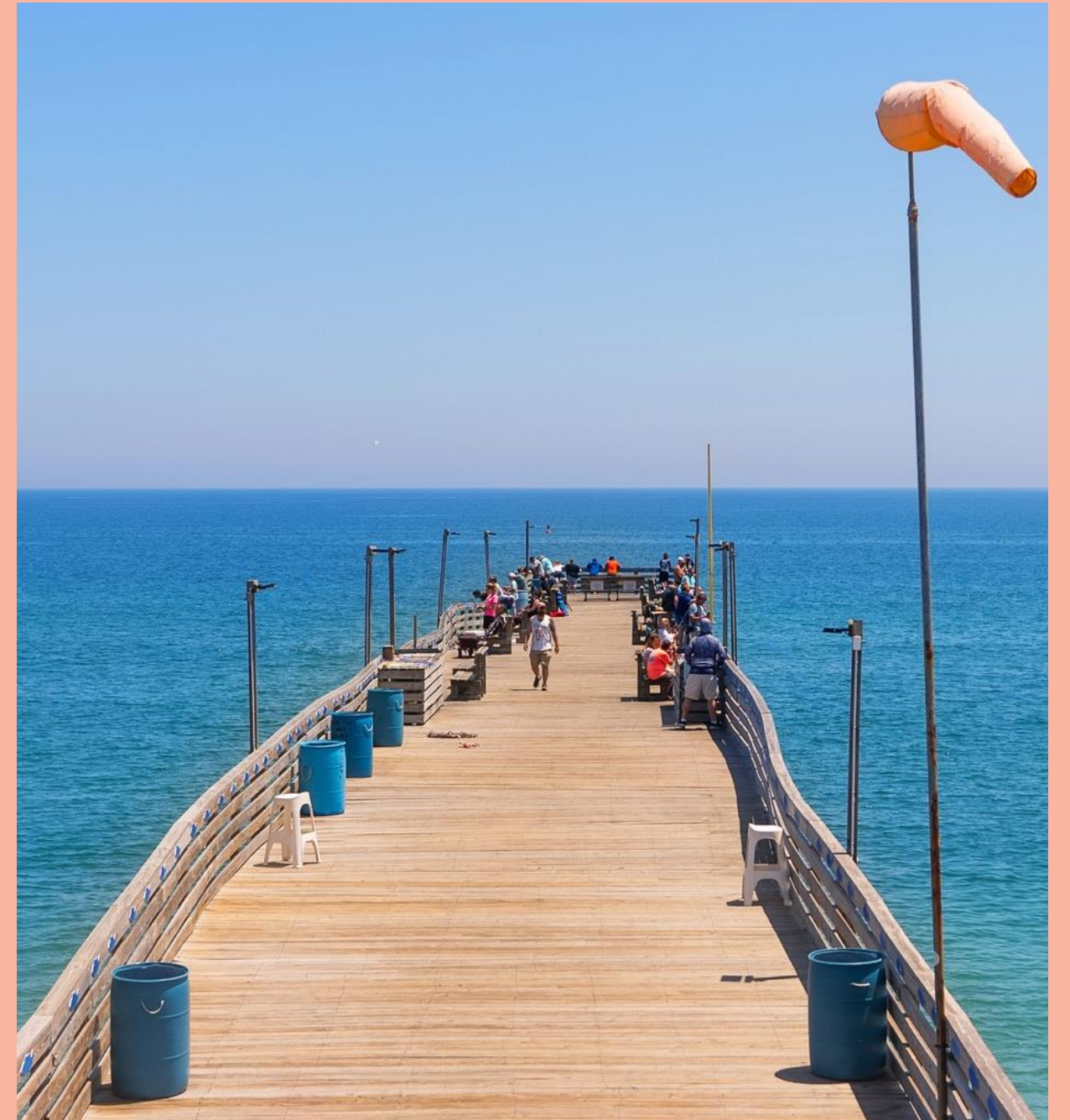
- Traffic, engagements, and conversions are cumulatively trending above goal for the fiscal year with conversions exceeding the stretch goal trend by 32%.
- Impressions remain just shy of goal as CPM costs were higher than anticipated towards the end of the year.
- As the first half of the fiscal year closed out, traffic to the website was the highest on record (Jul-Dec).

Next Steps & Recommendations:

- Promotion of Outer Edge Season 2.
- Focus on 2026 Travel Guide promotion utilizing the physical guide based on previous top-performing post.
- Spotlighting NEST in January, following the STAR Center content featured in December.
- Testing 20 Activities on the Outer Banks content on TikTok based on success of last year's "25 Things To Do" content and "adventure travel in 2026" trend identified by Pinterest.

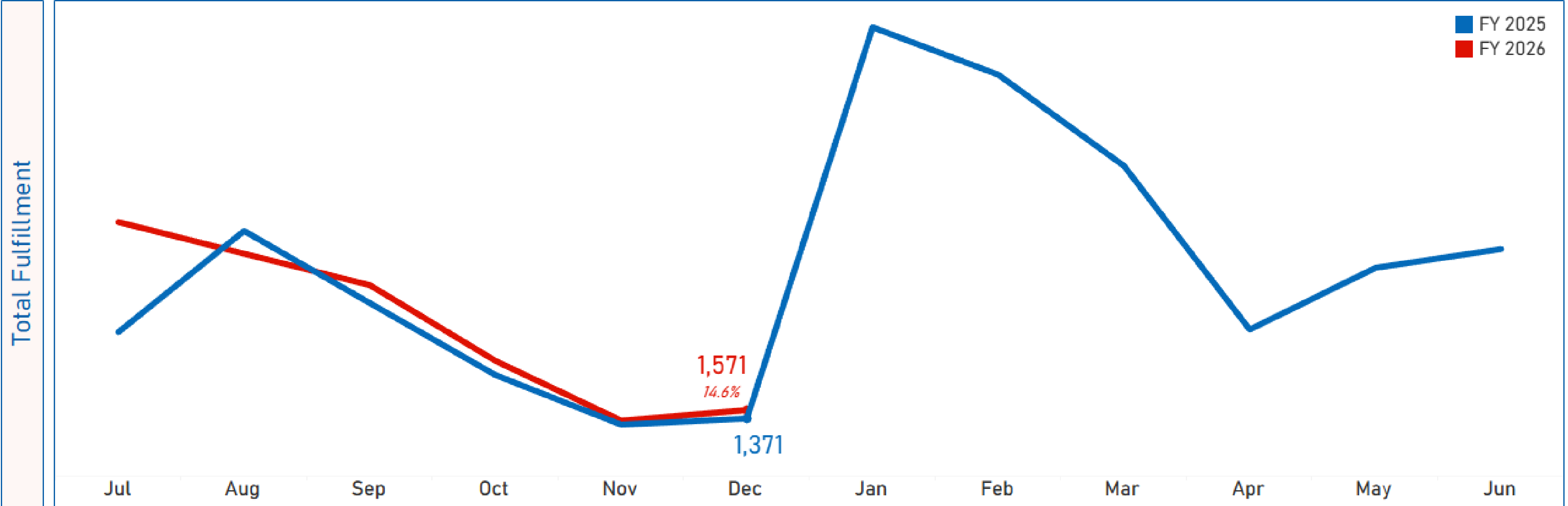
The Outer Banks Visitors Bureau

BUREAU FULFILLMENT



Outer Banks Visitors Bureau Monthly Fulfillment December 2025

Dec '25	Type of Request					Total
	Calls	Print	Online	eGuide	Mail	
	13	0	1,084	474	0	1,571
YOY	160.0%	-100.0%	35.7%	-15.2%		14.6%



The Outer Banks[®]
VISITORS BUREAU



BLUE ROOM
RESEARCH