Strategic Marketing & Research, Inc.

Outer Banks Visitors Bureau

Visitor Research
Wave 4 –2006

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BACKGROUND & OBJECTIVES

The Outer Banks has seen significant growth over the years, and while it has lead to increased visitation to the area, it could also lead to loss of character. In being proactive, the Outer Banks Visitor's Bureau is exploring the identity of its visitors and the types of trips they take to gain insight into ways in which to turn visitors into repeat customers.

This year-long effort involved gathering the names and contact information for visitors during each quarter. Then, a follow-up survey was conducted to gain insight into their visits and attitudes toward the Outer Banks. This report aims to help the Bureau market the amenities of the area and attract additional visitation. This report reflects all four waves of research and includes information relative to summer, fall, winter, and spring visitors. Additionally, the overall results representing all visitors are presented.

This research was conducted to address the following informational objectives:

- **Assess current perceptions of the Outer Banks** among visitors and identify the motivators critical to both initial and repeat visitation;
- **Develop a demographic profile of visitors and travel parties**, including age, income, education level and other key demographic characteristics;
- **Gather information regarding visitor origin** markets and identify key feeder markets for the Outer Banks area;
- **Profile trip specifics,** including duration of stay, travel party size, activities and expenditures while visiting the Outer Banks;
- **Compare the profile of visitors, by season,** to identify differences and explore the implications of these differences relative to marketing;
- **Assess visitor satisfaction** with the Outer Banks experience and identify pivotal barriers to satisfaction; and
- **Forward conclusions and recommendations** based on a detailed profile of visitors and their trips.

This effort is meant to analyze seasonal differences and overall trends relative to the Outer Banks' tourism trade.

METHODOLOGY

Key to a Visitor Study is the identification and surveying of a large and representative sample of visitors. This research included an on-site intercept of visitors, with a consequent follow-up survey. Specifically, visitors were intercepted at several locations throughout the Outer Banks area and asked to provide basic information. They were also asked to agree to be re-contacted after their trip to complete another survey. This process minimizes any negative impact on visitors during their trips and provides more complete and accurate information.

Specifically, the Outer Banks Visitors Bureau (OBVB) set up eight (8) active collection sites during the months of July and August in the following locations:

? The Expressway
? Aycock Brown Welcome Center
? Wright Brothers Memorial
? Ferry
? Cape Hatteras Lighthouse
? Whalebone Welcome Center
? Fort Raleigh
? Manteo Welcome Center

In total, 5,290 people completed the basic survey – 2,928 by summer visitors, 1,968 by fall visitors, 209 from winter visitors, and 185 by spring visitors. From these, SMARI completed 1,292 surveys - 647 with summer visitors, 458 with fall visitors, 88 with winter visitors, and 99 with spring visitors. Though SMARI had a far higher survey completion rate with winter and spring visitors – 20% complete in summer, 23% complete in fall, 43% in winter, and 54% complete in spring-- the original samples were far smaller. This distinction in sample size is important because the smaller the sample size, the more difficult it is to obtain accurate measures of some breakdowns. As such, in some cases the level of detail for winter and spring visitors is not available. However, for the overall study, the results have an accuracy of +/-2.8%.

The data from both the initial and the longer survey were compiled into a database. $PRIZM_{NE}$ data were appended to provide insight into the origin and lifestyle of visitors. Additionally, various statistical procedures were used to evaluate the findings and draw conclusions. This report provides insight into summer, fall, winter and spring visitors.

IMAGE OF THE DESTINATION

This research was designed to address the key issue of visitors' imagery of the Outer Banks. Here, the goal is to assess the perceived strengths of the area and identify issues which may drive marketing strategies relative to attracting higher levels of visitation or overcoming potential barriers to visitation.

For the image assessment, visitors were asked to rate the area on fourteen (14) attributes as they relate to a positive vacation experience. A 4-point scale was used for these ratings, with a higher score reflecting a more positive rating. With this scale, items rated "3.5" or better represent key strengths of the destination; ratings of "3" or *higher* represent acceptable ratings; and scores *below* "3" indicate areas of opportunity/improvement.

Overall, the Outer Banks earned very strong ratings. Five (5) attributes earned strong ratings and just four (4) received ratings below a mean of 3.0. Predictably, the area received strong ratings for its beautiful beaches, being a clean and safe environment and its scenic beauty. In addition, visitors offered strong ratings for the area's interesting historic sites / landmarks and good accommodations.

By comparing the four seasons, it is interesting that the ratings for Outer Banks' attributes do not vary significantly.

- **The greatest variations are the ratings for beaches, fishing, family attractions, shopping, and sporting activities.**
- **Except for good shopping opportunities, which continued to fall through spring, these ratings dipped in the fall and winter and rebounded in the spring. This is likely the case because outdoor activities like going to the beach and other sporting activities would have been a very different experiences in the fall and winter; specifically, not as enjoyable as they are in the summer or spring.**

Attribute Ratings
On 4-point Scale

Attributes	Overall	Summer	Fall	Winter	Spring
A clean & safe environment	**3.7**	3.7	3.7	3.5	3.8
Beautiful beaches	**3.8**	3.8	3.7	3.5	3.7
Interesting historic sites / landmarks	**3.6**	3.6	3.7	3.6	3.7
Scenic areas or scenic drives	**3.7**	3.6	3.7	3.6	3.7
Good accommodations	**3.6**	3.6	3.5	3.4	3.6
Wildlife viewing & bird-watching	**3.3**	3.3	3.1	3.1	3.5
Fishing opportunities	**3.2**	3.4	3.0	3.1	3.3
Good restaurants	**3.4**	3.4	3.4	3.3	3.3
Family attractions	**3.3**	3.4	3.2	3.0	3.2
Sporting activities	**2.9**	3.0	2.7	2.5	3.0
Good shopping opportunities	**3.2**	3.2	3.1	3.0	2.9
Arts or cultural activities	**2.6**	2.7	2.6	2.6	2.7
Good golf courses	**2.3**	2.3	2.2	2.1	2.4
Performing & visual arts	**2.4**	2.4	2.3	2.2	2.4

To assess the relative importance of these factors in motivating travel, the respondents were asked to identify those factors which were most important to their choosing to visit the Outer Banks. This exercise helps to identify the attributes which "motivate" the trip and the characteristics which differentiate the Outer Banks from other vacation options.

- **Overall, the area's beautiful beaches, accommodations, interesting historic landmarks and scenic areas or drives were the prime motivators.**
- **While among summer, fall, and spring visitors, the area's beautiful beaches were the primary influencer, scenic drives was the primary motivator in the winter.**
- **Similar to fall visitors, spring visitors also reported that interesting historic sites and landmarks was a key motivator. Further, like winter visitors, spring visitors were also motivated to visit the area for the scenic areas and drives.**

Motivations for Visiting the Outer Banks

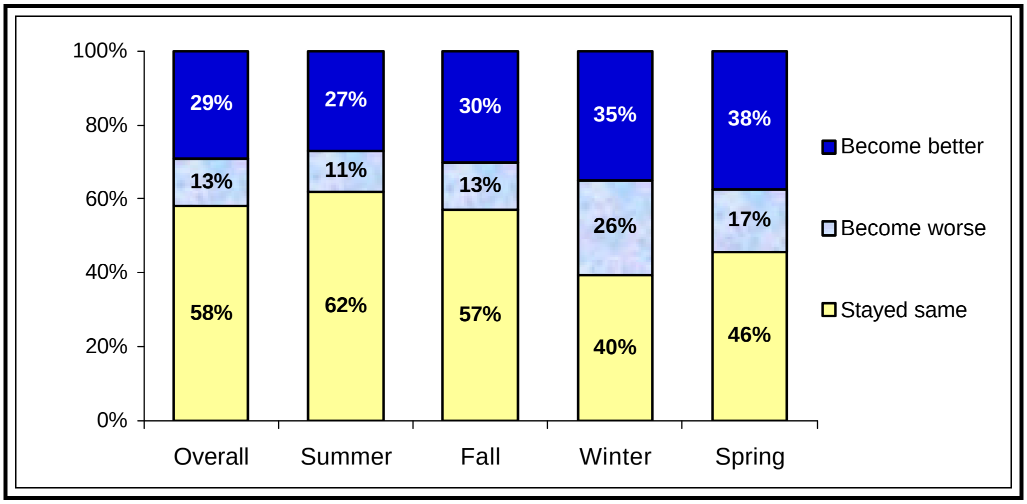
Visited for…	Overall	Summer	Fall	Winter	Spring
Beautiful beaches	40.7%	49.0%	34.0%	22.1%	30.9%
Interesting historic sites & landmarks	14.2%	8.1%	19.3%	22.1%	24.5%
Scenic areas or scenic drives	11.5%	8.4%	13.3%	24.7%	12.8%
A clean and safe environment	9.8%	10.5%	9.1%	7.8%	9.6%
Good accommodations	10.2%	9.2%	11.0%	15.6%	8.5%
Wildlife viewing and bird-watching	1.9%	1.5%	1.4%	1.3%	7.4%
Family attractions	3.5%	4.4%	2.8%	1.3%	3.2%
Good restaurants	2.3%	2.3%	2.8%	1.3%	1.1%
Good shopping opportunities	0.4%	0.3%	0.5%	0.0%	1.1%
Fishing opportunities	4.7%	5.0%	5.1%	3.9%	1.1%
Arts or cultural activities	0.1%	0.2%	0.0%	0.0%	0.0%
Sporting activities	0.7%	1.0%	0.5%	0.0%	0.0%
Good golf courses	0.2%	0.3%	0.2%	0.0%	0.0%
Visual arts or performing arts	0.1%	0.2%	0.0%	0.0%	0.0%

While becoming one of the premier destinations in the country, the Outer Banks must be concerned with a tradeoff between unique charm and development.

- **Overall, more than twice the number of visitors believes that the area has become better (29%) than has gotten worse (13%).**
- **While summer and fall visitors were in relative agreement that the area was staying the same or improving, winter visitors had very different reactions. Though a greater percentage believed the Outer Banks had gotten better, a higher percentage also believed the area had become worse. And while only 26% feel the destination is getting worse, this is worth monitoring.**
- **On the other hand, spring visitors were more likely to say that the Outer Banks has become a better destination than visitors from any other season. Still, a substantial proportion of spring visitors (17%) believe that the area has lost some of its appeal.**

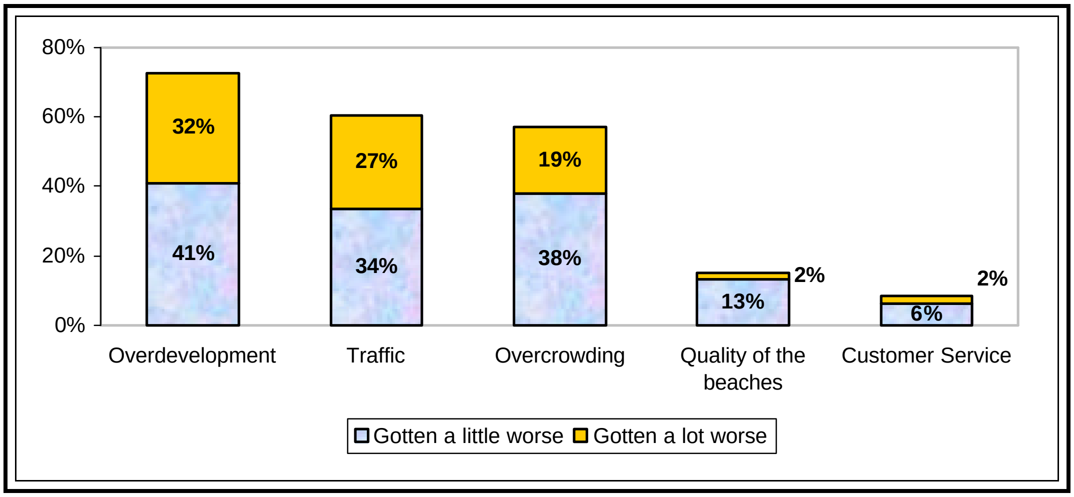
These findings suggest that the Outer Banks is maintaining its appeal. However, given the percentage of visitors that believe the destination has lost appeal, this trend should be monitored.

The Outer Banks has…



Visitors' perceptions of the Outer Banks were split between a belief that the area has improved or deteriorated. Similarly, the overall sense among all visitors that traffic, overcrowding and overdevelopment are closing in continues. The outlook, however, is more positive in terms of the beaches and customer service. Specifically, few people believe that the quality of the beaches or the level of customer service has deteriorated.

Perceptions of Changes to the Area
(among repeat visitors)



VISITOR PROFILE

It is also important to identify visitors to the Outer Banks and determine how their profiles vary by season, as seasonal changes can influence marketing efforts or other aspects of travel. This wave facilitates the comparison of winter visitors to those who arrive in the summer and fall.

Where are visitors coming from and which markets are generating the highest levels of visitation to the Outer Banks?

- **Overall, Washington, DC, Norfolk-Portsmouth-Newport News, VA, and Philadelphia, PA generated the highest percentage of visitors.**
- **Seasonally, the profile of visitors varies by city of origin, but a similar percentage of summer, fall, and winter visitors came from the same 22 markets.**
- **There is more variety, however, in the origination points of spring visitors. While approximately 60% of the summer, fall, and winter visitors were from 22 markets, just 55% of spring visitors came from those markets.**
- **In addition, the Norfolk-Portsmouth-Newport News, VA, Raleigh-Durham and New York, NY markets increased in spring, while the Washington, DC market decreased dramatically.**
- **Generally, spring visitors were more likely to come from nearby markets. Promotions in these areas during spring could generate additional travel.**

Origin of Visitors

City of Origin	Overall	Summer	Fall	Winter	Spring
Norfolk-Portsmouth-Newport News, VA	**6.9%**	6.3%	6.7%	14.4%	10.8%
Raleigh-Durham (Fayetteville), NC	**3.8%**	4.1%	3.0%	3.8%	7.0%
New York, NY	**4.4%**	4.0%	4.8%	4.3%	6.5%
Philadelphia, PA	**6.5%**	6.0%	7.8%	3.8%	3.8%
Boston (Manchester), MA-NH	**1.4%**	1.0%	1.7%	1.4%	3.2%
Charlotte, NC	**2.2%**	2.4%	1.8%	2.9%	2.7%
Pittsburgh, PA	**3.9%**	5.3%	2.1%	2.4%	2.7%
Richmond-Petersburg, VA	**4.9%**	5.4%	4.6%	3.8%	2.7%
Florence-Myrtle Beach, SC	**0.3%**	0.4%	0.2%	1.4%	0.0%
Greenville-New Bern-Washington, NC	**1.6%**	2.0%	0.9%	1.9%	1.6%
Minneapolis-St. Paul, MN	**0.5%**	0.4%	0.4%	1.4%	2.2%
Washington, DC (Hagerstown, MD)	**9.7%**	9.8%	10.6%	7.7%	2.2%
Cleveland, OH	**1.9%**	2.0%	2.0%	0.0%	1.6%
Greensboro-High Point-Winston Salem, NC	**1.7%**	1.7%	1.3%	3.8%	2.2%
Roanoke-Lynchburg, VA	**2.0%**	2.4%	1.7%	1.4%	1.6%
Columbus, OH	**1.1%**	1.1%	1.0%	1.0%	1.1%
Indianapolis, IN	**0.8%**	1.0%	0.4%	1.4%	1.1%
Baltimore, MD	**4.1%**	4.2%	4.4%	3.3%	0.5%
Cincinnati, OH	**1.1%**	1.3%	0.9%	0.5%	0.5%
Harrisburg-Lancaster-Lebanon-York, PA	**2.6%**	3.2%	2.0%	1.9%	0.5%
Hartford & New Haven, CT	**0.9%**	1.0%	0.9%	0.5%	0.5%
Total	**62.3%**	**65.0%**	**59.2%**	**63.0%**	**55.0%**

While the preceding table deals with differences between seasonal visitors, it does not account for new markets which are performing well for the Outer Banks during the spring months. In addition to those listed above, the table below shows high performing markets which were not represented in summer, fall, or winter.

Additional Markets Performing Well in the Spring

City of Origin	Summer	Fall	Winter	Spring
Denver, CO	0.3%	0.4%	0.0%	2.7%
Greenville-Spartanburg-Asheville-Anderson, SC-NC	0.8%	1.3%	1.0%	2.2%
Albany-Schenectady-Troy, NY	0.4%	0.5%	0.5%	1.6%
Milwaukee, WI	0.1%	0.3%	0.0%	1.6%
Orlando-Daytona Beach-Melbourne, FL	0.3%	0.4%	0.0%	1.6%
Total	1.9%	2.9%	1.4%	9.7%

Demographically speaking, the "average" visitor was white, 50 years of age, affluent, married, and college educated. Seasonally, the visitor profile remained relatively stable.

? **Spring visitors were most similar to summer and fall visitors.**
? **Unlike the summer, fall, and spring visitors, the average age of winter visitors was slightly older and, while still affluent, winter visitors earned lower incomes.**
? **Winter visitors were also far less likely to travel with children than the other visitors.**

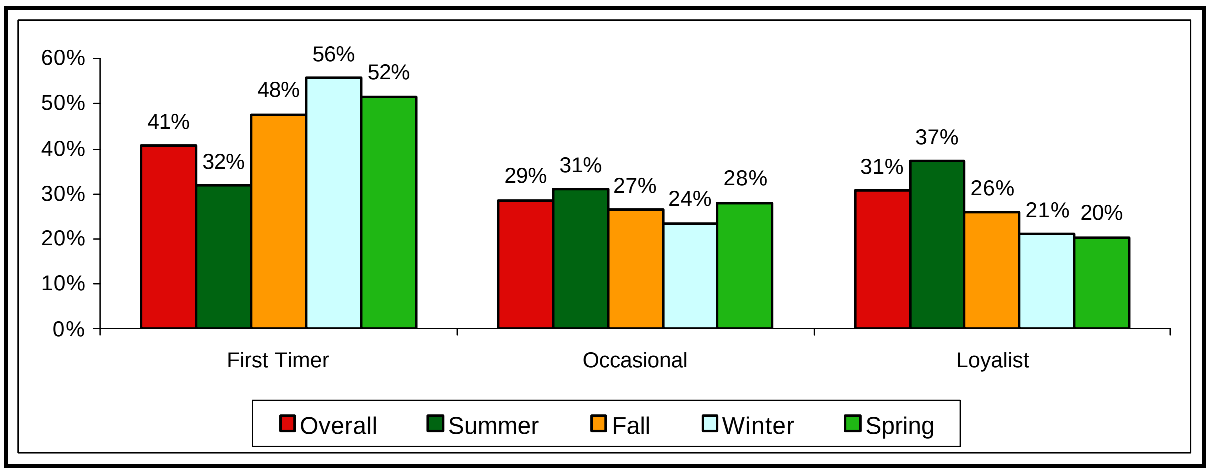
Demographic Profile

Demographics	Overall	Summer	Fall	Winter	Spring
Age	**50**	47	53	54	52
Income	**$80,966**	$84,198	$77,757	$72,833	$81,735
Marital Status					
Single	**14%**	14%	14%	13%	14%
Not single	**86%**	86%	86%	88%	86%
% With Kids	**37%**	49%	26%	20%	27%
Last Grade of School Completed					
High school or less	**12%**	11%	14%	11%	11%
Some college/tech school	**24%**	22%	29%	27%	18%
College graduate	**36%**	38%	33%	33%	35%
Post graduate	**28%**	29%	24%	28%	35%
Ethnic Heritage					
Caucasian/White	**95%**	95%	94%	96%	97%
African American	**1%**	1%	2%	2%	0%
Hispanic/Latin American	**1%**	1%	1%	0%	0%
Asian or Pacific Islander	**1%**	1%	1%	0%	2%
Native American	**1%**	0.5%	1%	0%	0%
Other	**1%**	1%	1%	1%	1%

Relative to trends, the survey identified *First-time* visitors and then split previous visitors into *Occasional* visitors and *Loyalists.* Loyalists reported having visited the area for each of the past three/four years and prior to 2003. Occasional visitors visited in 2005/2006 and at least one time prior.

? **During the summer, the split was fairly even.**
? **However, as noted in the previous Outer Banks visitor profile, a higher percentage of First-time visitors came in the fall. It was presumed that this was because First-timers are more likely to explore the Outer Banks during the off season. This trend continues with winter visitors and remains high with spring visitors.**
? **Far more visitors are visiting the Outer Banks for the first time in the off season. This has some marketing implications and means that the community has to work harder during these seasons to ensure a positive experience.**

Past Visitation



The demographic profile of these First-time visitors varies by season.

? **Again, the winter visitor tends to be older and less affluent than their seasonal counterparts. However, what is most interesting is the First-time winter visitor is even less likely to have kids and more likely to be better educated. Given these demographics and the changes in cities or origin, it is possible the winter visitors are "snowbirds" driving to Florida but deciding to stop in the Outer Banks for a short trip.**
? **Spring visitors are quite similar to fall visitors; they are approximately 50 years of age. They are slightly more affluent and more likely to travel with children than are fall visitors.**

Demographics of First-time Visitors

Demographics	Summer	Fall	Winter	Spring
Age	45	52	56	50
Income	$80,859	$75,500	$73,986	$79,024
Marital Status				
Single	17%	14%	9%	15%
Not single	83%	86%	91%	85%
% With Kids	54%	26%	13%	29%
Last Grade of School Completed				
High school	10%	13%	13%	15%
Some college/tech school	24%	26%	18%	19%
College graduate	38%	35%	29%	40%
Post graduate	27%	26%	40%	27%
Ethnic Heritage				
Caucasian/White	90%	92%	98%	94%
African American	2%	3%	2%	0%
Hispanic/Latin American	2%	1%	0%	0%
Asian or Pacific Islander	2%	1%	0%	4%
Native American	0%	2%	0%	0%
Other	4%	2%	0%	2%

The $PRIZM_{NE}$ system was used to classify the respondents by their zip codes. The system classifies people via 66 groups and each cluster is grouped by the population density of the area and the lifestage of the household. Relative to density, there are four (4) groups: urban (U), suburban (S), second city (C) and small town/rural (T). There are three lifestage classifications: younger without children (Y), families – include children in the home (F), and mature/no children (M).

In reviewing the overall $PRIZM_{NE}$ profile of visitors, note that not many visitors traveling to the Outer Banks are classified as “family.” Moreover, there is the high percentage visiting the Outer Banks from small towns, rural areas, and suburbs, and the low percentage visiting from cities. The overall $PRIZM_{NE}$ profile of visitors shows that while visitors to the Outer Banks are often well educated and earn high incomes, they are not necessarily *sophisticated*. Winter visitors are even more traditional, laid back and representative of heartland households than those who visit in the summer or fall.

In looking at the $PRIZM_{NE}$ data, spring classifications of visitors introduce some new profiles - Beltway Boomers, Sunset City Blues, New Empty Nesters, Young Influentials, and Kids & Cul-de-Sacs - while others gained or lost percentages. Spring visitors are evenly split among cities, suburbs, and towns. Also noted in the demographic profile, far fewer are traveling to the Outer Banks with children; there are more mature visitors than younger or family visitors traveling in the spring. Spring visitors are mixed between influential suburbanites and more traditional, heartland households.

PRIZM $_{NE}$ Overall Profile of Visitors

#	Cluster Name	Outer Banks	Index	Density	Lifestage
25	Country Casuals	3%	241	T	Y
05	Country Squires	4%	218	T	F
09	Big Fish, Small Pond	4%	189	T	M
37	Mayberry-ville	4%	183	T	Y
28	Traditional Times	4%	168	T	M
11	God's Country	2%	156	T	Y
02	Blue Blood Estates	1%	152	S	F
42	Red, White & Blues	2%	147	T	Y
39	Domestic Duos	2%	142	S	M
13	Upward Bound	2%	141	C	F
08	Executive Suites	1%	139	S	Y
21	Gray Power	1%	139	S	M
10	Second City Elite	2%	135	C	M
49	American Classics	1%	135	S	M
62	Hometown Retired	2%	133	C	M
15	Pools & Patios	2%	131	S	M
12	Brite Lites, Li'l City	2%	130	C	Y
41	Sunset City Blues	2%	130	C	M
20	Fast-Track Families	2%	124	T	F
17	Beltway Boomers	1%	122	S	F
03	Movers & Shakers	2%	118	S	Y
38	Simple Pleasures	3%	116	T	M
45	Blue Highways	2%	114	T	Y
19	Home Sweet Home	2%	107	S	Y
35	Boomtown Singles	1%	101	C	Y
06	Winner's Circle	1%	101	S	F

PRIZM $_{NE}$ Profiling Summer Visitors

#	Cluster Name	Outer Banks	Index	Density	Lifestage
05	Country Squires	5.3%	302	T	F
25	Country Casuals	4.0%	298	T	Y
49	American Classics	2.2%	210	S	M
37	Mayberry-ville	4.2%	186	T	Y
13	Upward Bound	2.8%	181	C	F
11	God's Country	2.6%	176	T	Y
08	Executive Suites	1.9%	175	S	Y
06	Winner's Circle	1.7%	170	S	F
09	Big Fish, Small Pond	3.6%	167	T	M
42	Red, White & Blues	2.0%	166	T	Y
15	Pools & Patios	2.0%	162	S	M
20	Fast-Track Families	2.3%	161	T	F
21	Gray Power	1.7%	160	S	M
02	Blue Blood Estates	1.5%	159	S	F
28	Traditional Times	4.2%	156	T	M
12	Brite Lites, Li'l City	2.3%	156	C	Y
62	Hometown Retired	1.7%	147	C	M
45	Blue Highways	2.3%	136	T	Y
38	Simple Pleasures	3.2%	128	T	M
35	Boomtown Singles	1.5%	126	C	Y
46	Old Glories	1.2%	124	S	M
10	Second City Elite	1.4%	116	C	M
19	Home Sweet Home	2.0%	115	S	Y
43	Heartlanders	2.3%	115	T	M
39	Domestic Duos	1.2%	113	S	M
58	Back Country Folks	2.6%	107	T	M
56	Crossroad Villagers	2.2%	107	T	Y
40	Close-In Couples	1.2%	103	U	M

PRIZM $_{NE}$ Profiling Fall Visitors

#	Cluster Name	Outer Banks	Index	Density	Lifestage
9	Big Fish, Small Pond	5.3%	249	T	M
28	Traditional Times	4.8%	180	T	Y
3	Movers & Shakers	3.7%	235	S	Y
37	Mayberry-ville	3.4%	151	T	M
5	Country Squires	3.2%	185	T	F
13	Upward Bound	3.2%	206	C	F
11	God's Country	2.8%	191	T	Y
25	Country Casuals	2.8%	211	T	M
38	Simple Pleasures	2.7%	108	T	M
41	Sunset City Blues	2.7%	155	C	M
15	Pools & Patios	2.6%	212	S	M
23	Greenbelt Sports	2.2%	141	T	Y
45	Blue Highways	2.2%	132	T	M
58	Back Country Folks	2.2%	92	T	M
43	Heartlanders	2.2%	109	T	Y
20	Fast-Track Families	2.1%	144	T	F
27	Middleburg Managers	2.1%	110	C	M
19	Home Sweet Home	2.0%	113	S	Y

PRIZM $_{NE}$ Profiling Winter Visitors

#	Cluster Name	Outer Banks	Index	Density	Lifestage
28	Traditional Times	6.7%	251	T	M
37	Mayberry-ville	4.8%	214	T	Y
38	Simple Pleasures	4.3%	170	T	M
11	God's Country	3.8%	255	T	Y
20	Fast-Track Families	3.3%	229	T	F
45	Blue Highways	3.3%	194	T	M
58	Back Country Folks	3.3%	135	T	M
9	Big Fish, Small Pond	2.9%	136	T	M
36	Blue Chip Blues	2.9%	238	S	F
48	Young & Rustic	2.9%	146	T	Y
10	Second City Elite	2.4%	200	C	M
25	Country Casuals	2.4%	178	T	Y
42	Red, White & Blues	2.4%	198	T	Y

PRIZM$_{NE}$ Profiling Spring Visitors

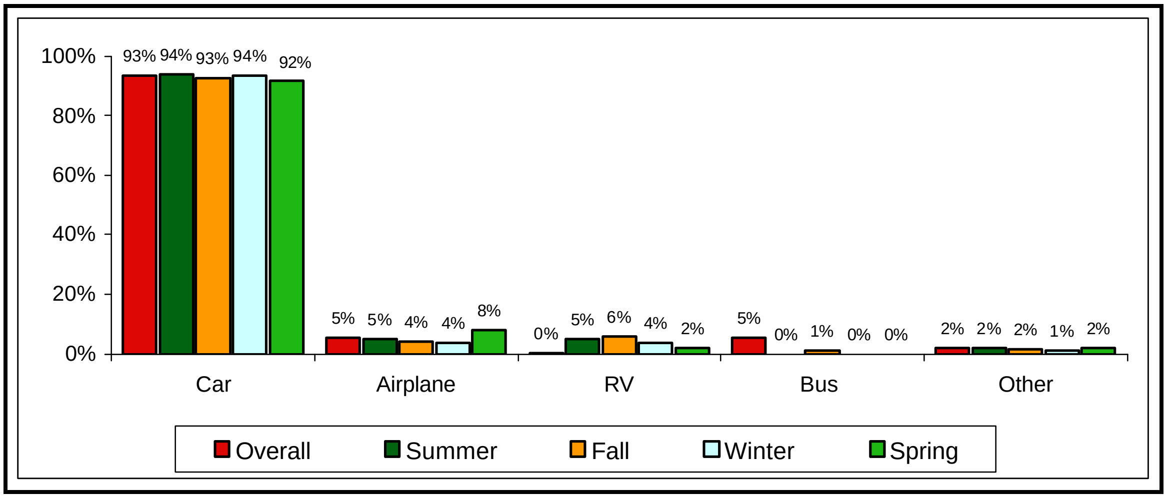
#	Cluster Name	Outer Banks	Index	Density	Lifestage
17	Beltway Boomers	3.0%	319	S	F
41	Sunset City Blues	4.0%	234	C	M
14	New Empty Nests	2.0%	191	S	M
28	Traditional Times	5.1%	189	T	M
45	Blue Highways	3.0%	178	T	Y
10	Second City Elite	2.0%	168	C	M
22	Young Influentials	2.0%	138	S	Y
12	Brite Lites, Li'l City	2.0%	136	C	Y
18	Kids & Cul-de-Sacs	2.0%	135	S	F
23	Greenbelt Sports	2.0%	127	T	Y
38	Simple Pleasures	3.0%	120	T	M
27	Middleburg Managers	2.0%	107	C	M

TRIP SPECIFICS

The survey provides insight into the details of visitors' trips to the Outer Banks. They reported details ranging from transport to what they did and how much they spent.

- **Overall, most visitors drove to the Outer Banks (93%), while a small number traveled by air to the area, drove an RV, or arrived on a bus.**
- **Seasonally, the percentage of drivers remained essentially unchanged - 94% in the summer, 93% in the fall, 94% in the winter and 92% in the spring.**
- **The number of those who traveled by air was lowest during fall and winter - just 4% - and it was highest in the spring, at 8%.**
- **RVs were most popular in the fall.**

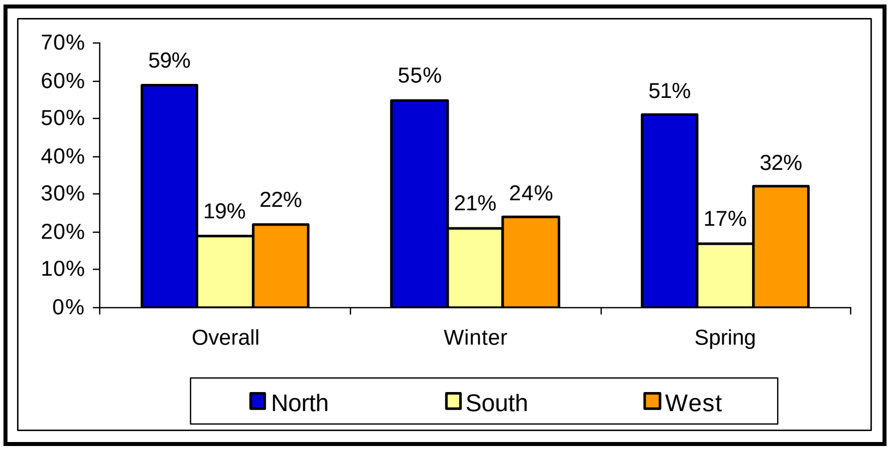
Transportation to the Outer Banks



Because the Outer Banks saw such high percentages of visitors arriving by car in the summer and fall waves of the survey, new information was gathered for winter and spring.

- **Overall, most visitors came from the north, and almost an even number came from the south and west.**
- **This breakdown was steady in both winter and spring.**

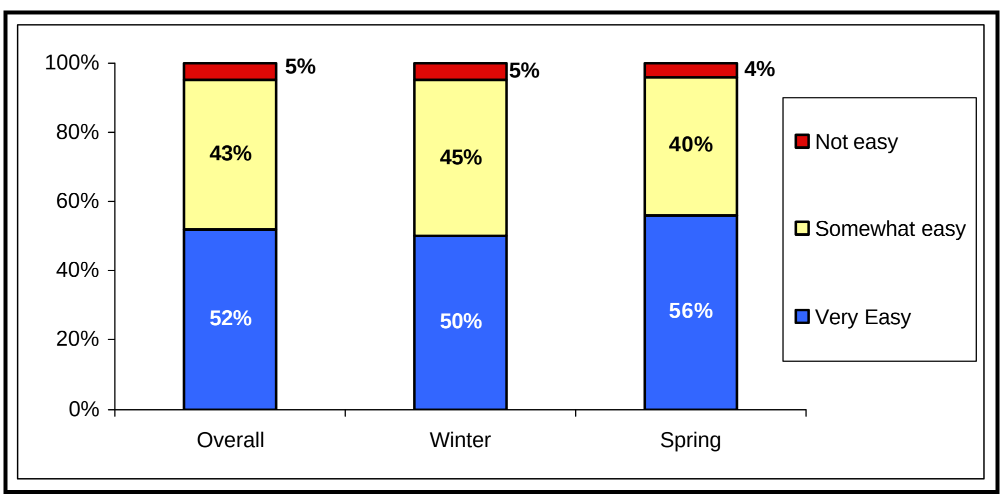
Direction Traveled From



And because so many visitors come by car, usage of the interstate and highway system is prevalent. However, most visitors (95%) find the transportation system to the Outer Banks easy to access.

- **Approximately 50% of all travelers thought that traveling to the Outer Banks was "very easy," meaning that the other half experienced some challenges in travel which could impact future visitation.**

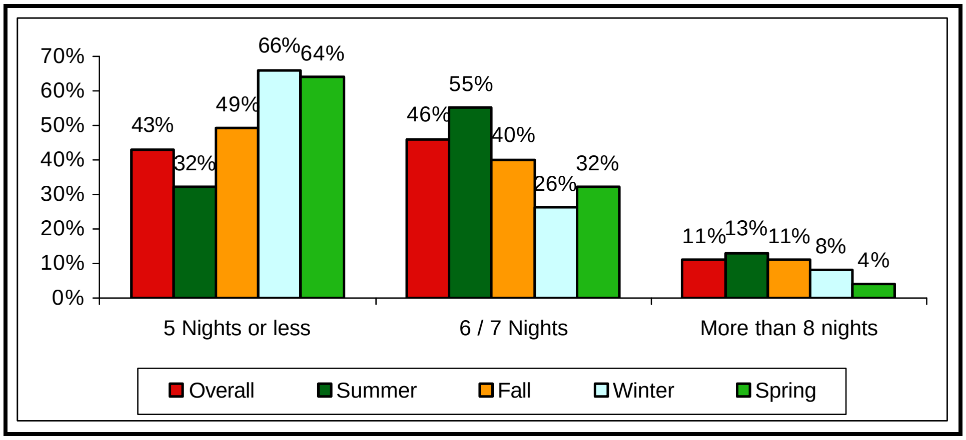
Ease of Access to Outer Banks



Overall, visitors stayed an average of 5.7 nights.

- **Summer visitors took the longest trips, with an average of 6.2 nights.**
- **The average number of nights stayed for fall, winter and spring visitors continued to decrease the further away from peak summer travel.**
- **While the average summer trip was 6.2 nights in duration, fall trips averaged 5.4 nights, winter trips averaged 5.2 nights, and spring trips averaged 4.3 nights.**
- **These trends appear in the breakdown below, with summer visitors staying longer than visitors during any other season.**

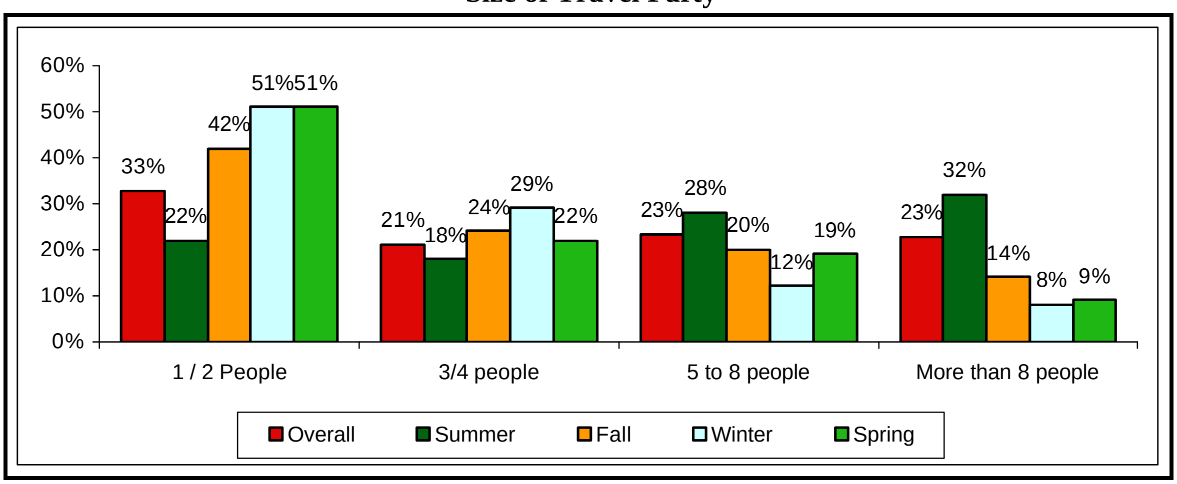
Duration of Stay



The average travel party size overall was 6.3 people.

- **Summer visitors reported the largest travel parties with a mean of 7.6 people.**
- **Fall, winter, and spring parties were considerably smaller than summer parties: fall visitors' average travel party size was 5.4, winter 3.8, and spring 4.0 people.**

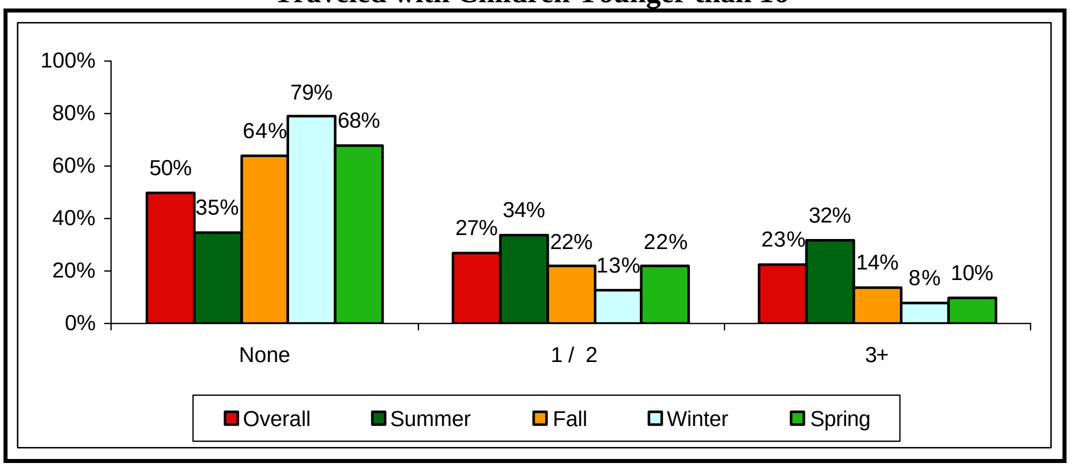
Size of Travel Party



The mean number of children ages 16 or younger in an "average" travel party was 1.6.

- **Just as summer travel parties were larger, more children were included, with a mean of 2.3.**
- **Fall, winter and spring travel parties comprised significantly fewer children than summer groups: fall trips included 1.0, winter 0.6, and spring 0.7 children.**
- **The graphic below shows this same trend: Trips that included children were dominant in the summer (64% included a child of 16 or younger), in the fall, 36% of trips included children 16 or younger and, in the spring, 32% of trips included children. However, in winter, only 21% of trips were families traveling with young children.**

Traveled with Children Younger than 16



In general, the most popular overnight destinations in the Outer Banks were Nags Head, Kill Devil Hills, Kitty Hawk, and Duck. These destinations remained popular seasonally.

? **There was, however, less variation in overnight destinations for winter travelers compared to summer, fall, and spring. In the winter, two-thirds of all visitors stayed in one of three locations while in the Outer Banks – Kill Devil Hills, Nags Head and Kitty Hawk. This is not surprising considering these three areas are most easily accessed through the highway system and, given shorter stays in the winter, these destinations require less travel time.**

? **Although spring visitors generally stayed in the same locations as other visitors, more spring visitors frequented Ocracoke than visitors during any other season.**

Stayed During Visit to Outer Banks

Destination	Overall	Summer	Fall	Winter	Spring
Kill Devil Hills	**15%**	9%	20%	26%	23%
Nags Head	**17%**	16%	18%	22%	21%
Kitty Hawk	**12%**	9%	15%	18%	19%
Duck	**10%**	9%	11%	8%	8%
Avon	**7%**	7%	7%	4%	4%
Hatteras Island	**7%**	8%	6%	5%	6%
Corolla Light	**6%**	7%	5%	5%	4%
Ocracoke	**7%**	8%	4%	5%	13%
Buxton	**5%**	6%	3%	4%	4%
Southern Shores	**3%**	3%	3%	1%	2%
Rodanthe	**4%**	5%	3%	6%	0%
Waves	**2%**	3%	3%	0%	0%
Manteo / Roanoke Island	**3%**	3%	2%	5%	3%
Hatteras Village	**3%**	4%	2%	1%	2%
Salvo	**2%**	3%	2%	0%	1%
Frisco	**3%**	5%	1%	0%	0%

In addition to the destinations listed above, spring visitors were attracted to other towns as well spring visitors were most likely to visit Kitty Hawk, Nags Head, Manteo or Roanoke Island, and Hatteras Island. In fact, only 7% of spring visitors *did not* travel to destinations beyond their overnight location.

Additional Locations Visited by Spring Visitors

Town	%
Kitty Hawk	63%
Nags Head	51%
Kill Devil Island	48%
Hatteras Island	62%
Hatteras Village	43%
Manteo or Roanoke Island	53%
Duck	45%
Buxton	28%
Avon	25%
Rodanthe	21%
Southern Shores	29%
Salvo	22%
Frisco	21%
Waves	18%
None of these	7%

In general, rental properties were the most popular accommodation, followed by condos or timeshares and familiar chain motels with on-site amenities.

? **While rental properties were the most common type of accommodation for summer and fall visitors, usage fell off among winter and spring visitors.**

? **Timeshares gained tremendous usage compared to summer, but overall, hotels were the most popular accommodation in winter and spring, with half of all visitors in some type of hotel or motel.**

The research among summer and fall visitors suggested that the use of rental properties was heavier among repeat visitors.

- **This trend continues overall and among spring visitors, however, for winter visitors, this was not necessarily true.**
- **While overall rental properties were used far less in the winter, loyal winter visitors were less likely (39%) to have stayed in rental accommodations than First-time visitors (48%).**

Type of Accommodation Used

Accommodations	Overall	Summer	Fall	Winter	Spring
A house rental on the beach	**24%**	28%	24%	13%	8%
A house rental not on the beach	**21%**	28%	17%	4%	7%
A condominium / timeshare	**12%**	6%	17%	24%	28%
A familiar chain motel or hotel with on-site amenities, e.g., restaurant or swimming pool	**12%**	8%	16%	22%	19%
A non-chain motel / hotel with on-site amenities, e.g., restaurant or swimming pool	**7%**	5%	9%	12%	13%
A campground or RV	**8%**	9%	8%	6%	3%
A familiar chain motel or hotel without on-site amenities	**5%**	3%	7%	10%	6%
A non-chain motel / hotel without on-site amenities	**5%**	5%	4%	6%	6%
Family or friends	**4%**	4%	4%	4%	4%
A bed & breakfast	**3%**	3%	3%	5%	5%
A cottage court	**2%**	2%	2%	1%	1%
A National park where you camped	**3%**	3%	1%	0%	4%
Other	**2%**	3%	1%	3%	0%

Predictably, the most popular activities overall included visiting the beach, enjoying the scenic beauty, and eating at restaurants unique to the area. In developing marketing messages for audiences depending on travel season, it is important to know not only what activities are highly utilized during each season, but also how activities *vary* by season.

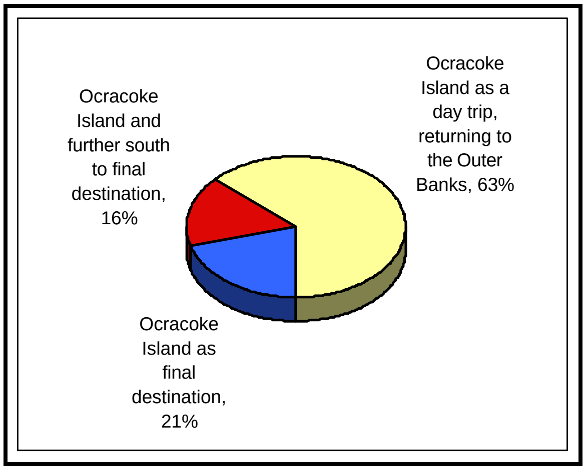
- **For example, while visiting the ocean or beaches remains the most popular trip activity in winter with 92% participation, it loses ground, not surprisingly, when compared to summer visitors. So what is important to consider are the activities which gain significant participation with winter visitors – wildlife viewing and visiting national parks and historic sites.**
- **Like winter visitors, spring visitors enjoyed wildlife viewing, bird watching, hiking and biking significantly more than summer visitors. Spring visitors, however, were much less likely to fish or take the ferry.**

Activities during Trip

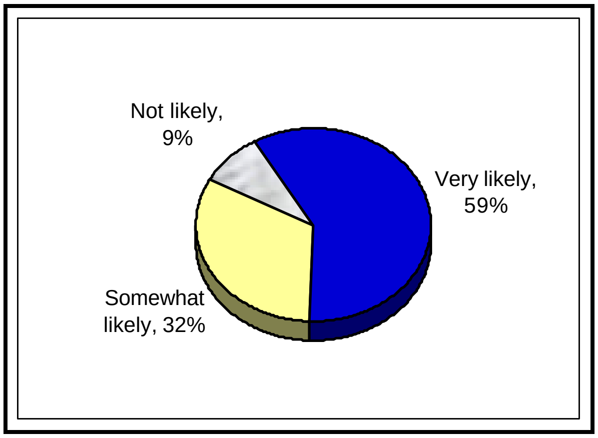
Activities	Overall	Summer	Fall	Winter	Spring
Enjoy scenic beauty	89.3%	89.3%	88.7%	85.9%	94.7%
Visit the ocean or beaches	94.8%	96.6%	92.9%	92.3%	92.6%
Take scenic drives along the coast	75.5%	73.3%	75.8%	79.5%	86.3%
East at restaurants unique to the area	84.1%	84.3%	82.8%	89.7%	84.2%
Visit historic sites	79.6%	69.4%	78.6%	84.6%	84.2%
Visit lighthouses & other coastal relics	74.7%	73.1%	76.0%	78.2%	76.8%
Go shopping	75.7%	78.2%	72.9%	71.8%	73.7%
Visit the national parks	57.1%	52.6%	57.4%	73.1%	72.6%
Enjoy wildlife viewing/Bird watching	46.4%	44.9%	42.4%	60.3%	63.2%
Take ferry	48.8%	53.3%	41.2%	50.0%	51.6%
Go hiking or biking	34.3%	35.9%	30.4%	24.4%	49.5%
Visit shipwrecks/lifesaving stations	21.7%	20.7%	19.8%	24.4%	34.7%
Visit art/cultural museums or galleries	26.2%	25.5%	24.5%	32.1%	33.7%
Go fishing	29.1%	35.6%	25.2%	19.2%	10.5%
Attend festivals or craft fairs	7.8%	8.1%	7.8%	5.1%	8.4%
Go camping	9.7%	11.2%	8.2%	6.4%	8.4%
Golf	8.8%	9.3%	8.7%	7.7%	6.3%
Attend theatre performances	5.6%	7.3%	3.8%	3.8%	4.2%
Canoeing or kayaking	9.7%	14.5%	5.4%	0.0%	4.2%
Play tennis	2.7%	3.3%	1.6%	1.3%	4.2%
Attend / participate in sporting events	5.6%	7.0%	4.7%	1.3%	3.2%
Attend musical performances	4.6%	5.8%	3.1%	5.1%	3.2%

Specific questions regarding the North Carolina Ferry System were included to measure visitors' usage and satisfaction. As seen above, almost half of all visitors took the ferry. Most visitors used the ferry to get to Ocracoke Island as a day trip. In addition, almost all visitors said that they would ride the ferry even if it had a fee. A majority (64%) of visitors were aware of the toll free ferry information number.

Purpose of Ferry Usage



Likelihood to Ride Ferry with a Fee



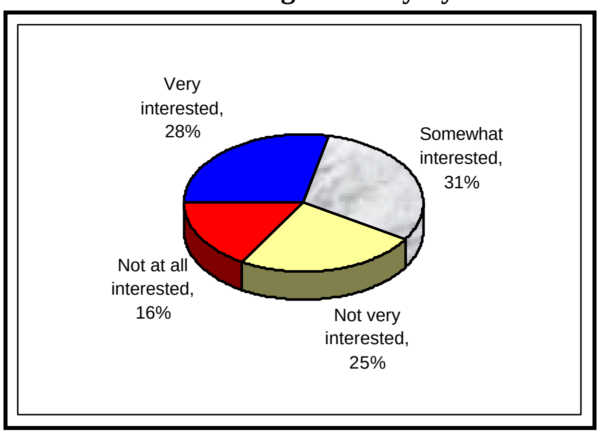
Finally, those who indicated using the ferry during their visit to the Outer Banks were asked to rate their experience on a handful of categories. Overwhelmingly, those who rode the ferry were positive about the experience. The ratings are based on a 5-point scale and, generally, the goal is a rating of 4.0 or higher with a score of 3.5 or higher being acceptable. The ferry system performed extremely well in all three categories.

Ferry Ratings

Friendliness	4.52
Knowledge	4.44
Appearance	4.52

Additional information about interest in using a trolley system was gathered in the spring months. Almost 60% of visitors said that they were at least somewhat interested in using a trolley system that they could ride to get them from place to place. Only a small percentage was not at all interested. In addition, 91% of visitors said they would be willing to pay $1 to ride a trolley, while only 9% would not be willing. These findings show significant interest in a trolley system.

Interest in Using a Trolley System



A final trip specific is the money that visitors spent while visiting the Outer Banks. Overall, the "average" visitor spent a total of $2,193 during their trip, with an average of $61 per person per night.

- **Expenditures on behalf of spring visitors rose slightly from the winter average, to $1,444 for an average trip.**
- **In addition, the cost per person per night increased dramatically in the spring, to $84. Spring visitors spent a substantial percentage more on meals, food, and groceries, which may account for part of this increase.**
- **Additionally, winter and summer visitors spent more than spring and fall visitors on transportation. However, both winter and spring visitors spent less on lodging expenses, which may have helped level off these other expenses.**

Visitors' Expenditures

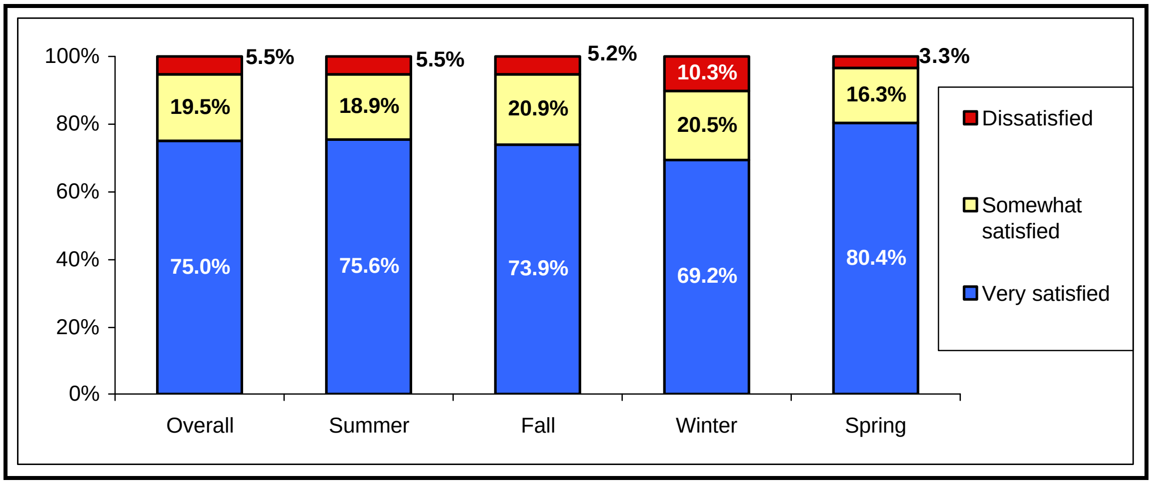
Expenditures	Overall	
Lodging	$1,139	52%
Meals/Food/Groceries	$421	19%
Entertainment, e.g., shows/theater/concerts	$40	2%
Shopping	$258	12%
Transportation	$207	9%
Attractions	$63	3%
Other	$65	3%
Total	**$2,193**	
Per person/per night	$61	

	Summer		Fall		Winter		Spring	
Lodging	$1,502	55%	$827	50%	$474	35%	$538	37%
Meals/Food/Groceries	$494	18%	$340	21%	$291	21%	$384	27%
Entertainment, e.g., shows/theater/concerts	$54	2%	$23	1%	$28	2%	$28	2%
Shopping	$290	11%	$228	14%	$205	15%	$213	15%
Transportation	$245	9%	$139	8%	$272	20%	$187	13%
Attractions	$73	3%	$49	3%	$56	4%	$69	5%
Other	$93	3%	$35	2%	$45	3%	$25	2%
Total	**$2,751**		**$1,641**		**$1,370**		**$1,444**	
Per person/per night	$58		$61		$70		$84	

VISITOR SATISFACTION & REPEAT VISITATION

This research measures visitors' satisfaction with the Outer Banks and identifies ways to increase their satisfaction. The overall level of satisfaction remains high. Specifically, winter visitors were the least satisfied and spring visitors were the most satisfied.

Visitor Satisfaction



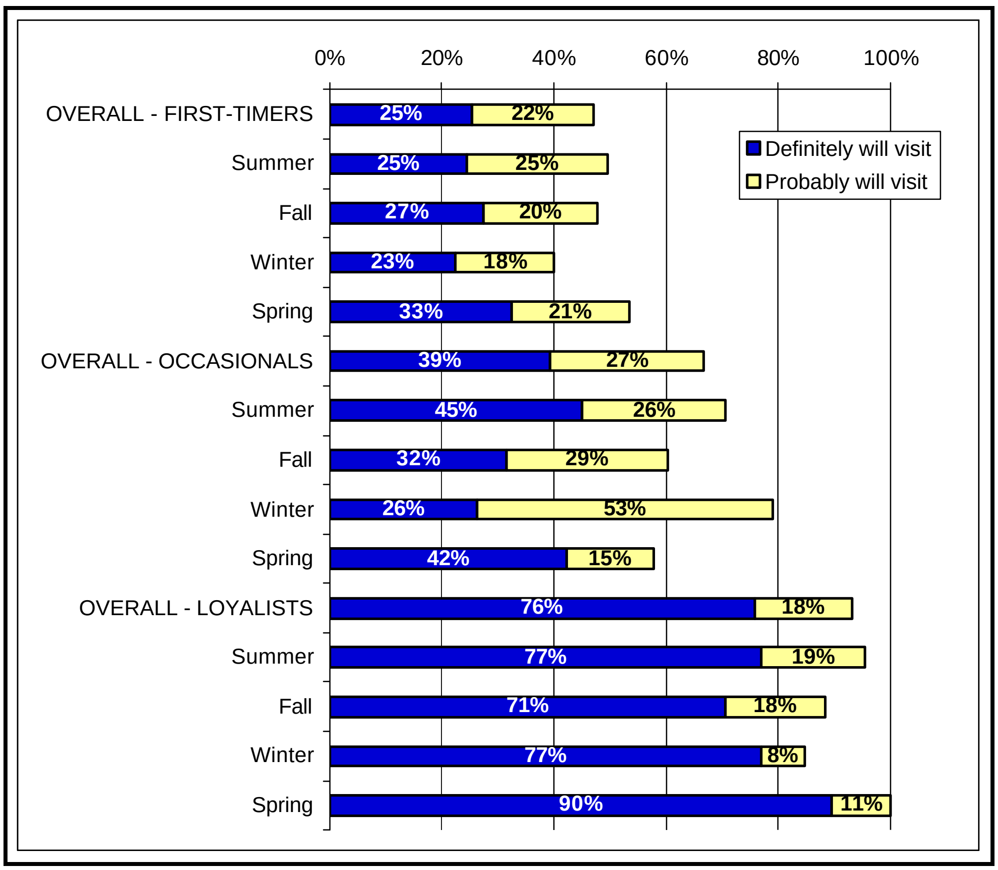
Visitors' satisfaction of course affects their likelihood to return to the Outer Banks.

? **In addition to being less satisfied, those who visited the Outer Banks in the winter were far less likely to consider visiting again. Spring visitors, who were the most satisfied, were more likely to consider a return visit.**

? **Of note is the number of past visitors that said they definitely would return to the Outer Banks. There has been a steady drop over the seasons among occasional visitors who believe they will definitely return – from 45.1%, in summer, to 31.5%, in fall and 26.3%, in winter - however, this number rose to 42.3% in the spring.**

When asked why they were not considering another visit to the Outer Banks, visitors did not claim to be dissatisfied with their trip. Instead, they said that they wanted to explore many other destinations. To attract repeat visitors, the Bureau must develop ways for an additional trip to seem like another experience, rather than the same attractions, restaurants and lodging as offered previously. Perhaps by promoting out-of-the way towns which are rarely visited or activities which are under utilized, more people would consider returning to the Outer Banks. Of course, the area must continue to grow business via promotion to First-time visitors.

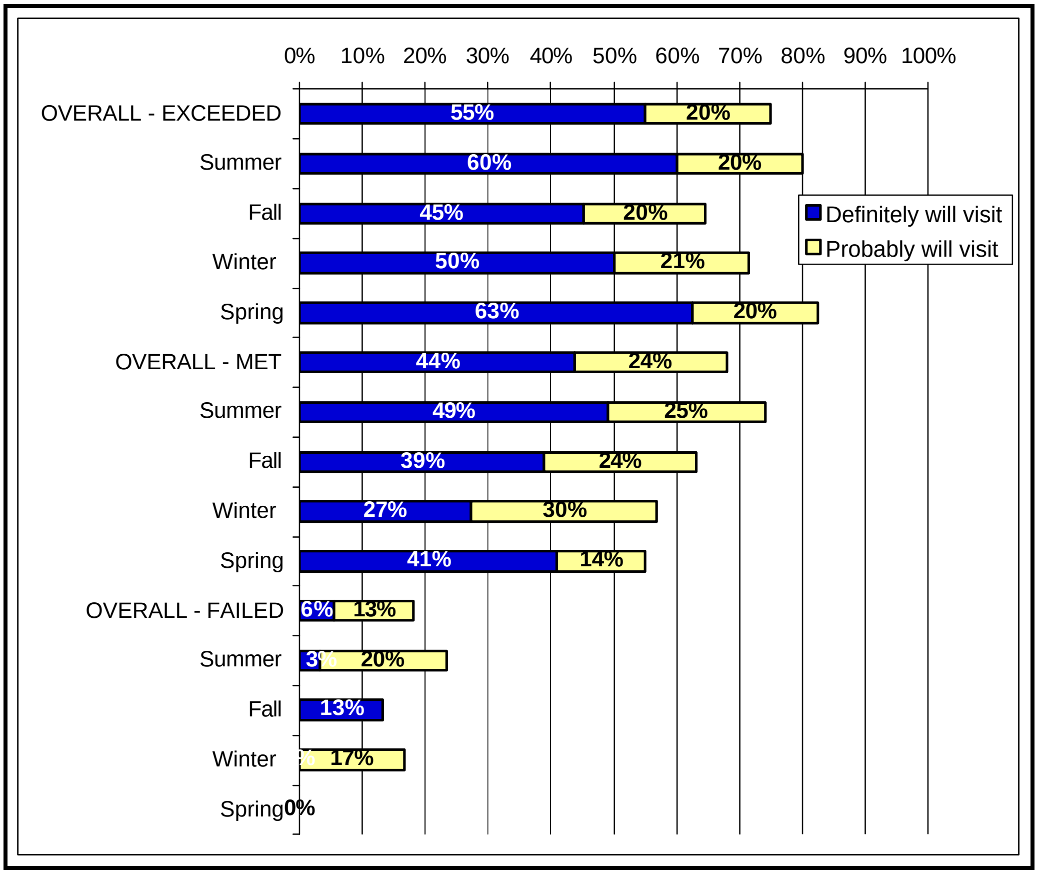
Likelihood to Visit



While winter visitors were the least likely to say they would return (74% for summer, 62% for fall, 59% for winter, and 65% for spring), we see again that by exceeding expectations, the Outer Banks can garner repeat business. This is true among all visitors, especially those who arrived in the spring and summer months.

- **For example, 63% of spring visitors that said the trip exceeded their expectations claimed that they would definitely visit the Outer Banks next year.**

Likelihood to Visit in the Next Year by Level of Expectations

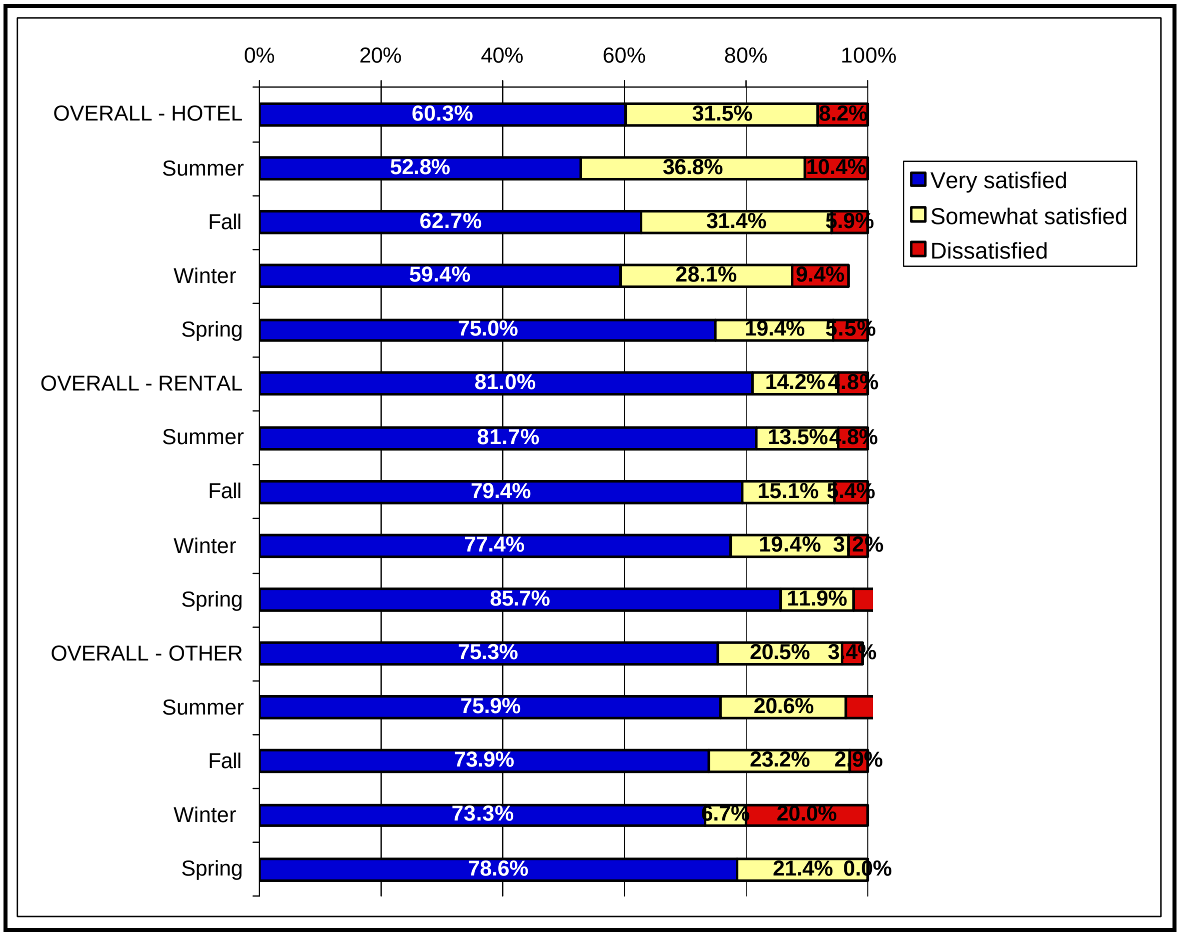


Winter visitors were the least satisfied with their trips to the Outer Banks, which could be a result of attractions available during the off season and lack of opportunities in the winter months. However, when looking at the types of accommodations used, we see that this issue has significant influence on visitor satisfaction.

? **Those in rented accommodations were consistently more satisfied than those who used other types of lodging. Because fewer winter visitors stayed in rentals, it can be assumed that the increase in the use of hotels and other accommodations contributed to a depression in their overall satisfaction ratings.**

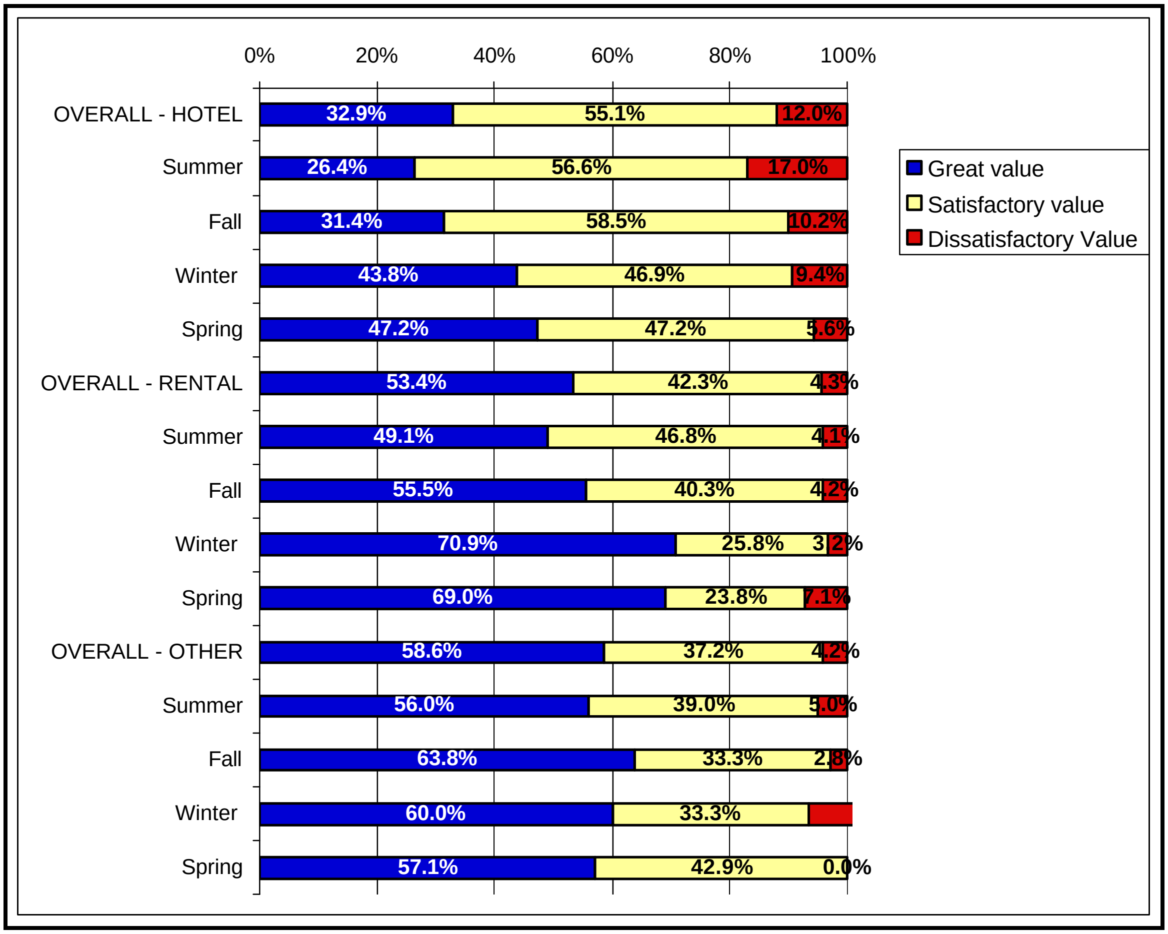
? **On the other hand, more spring visitors used rental accommodations, which may explain their high satisfaction ratings.**

Satisfaction by Type of Accommodations Used



While hotel and motel properties suffered from weak value perceptions in summer and winter, the ratings increased slightly in the fall and continued to improve in the spring. This is likely because the properties offer extremely reduced rates in the off season. Again, however, the ratings for such accommodations continue to suffer.

Perceptions of Value by Type of Accommodation Used



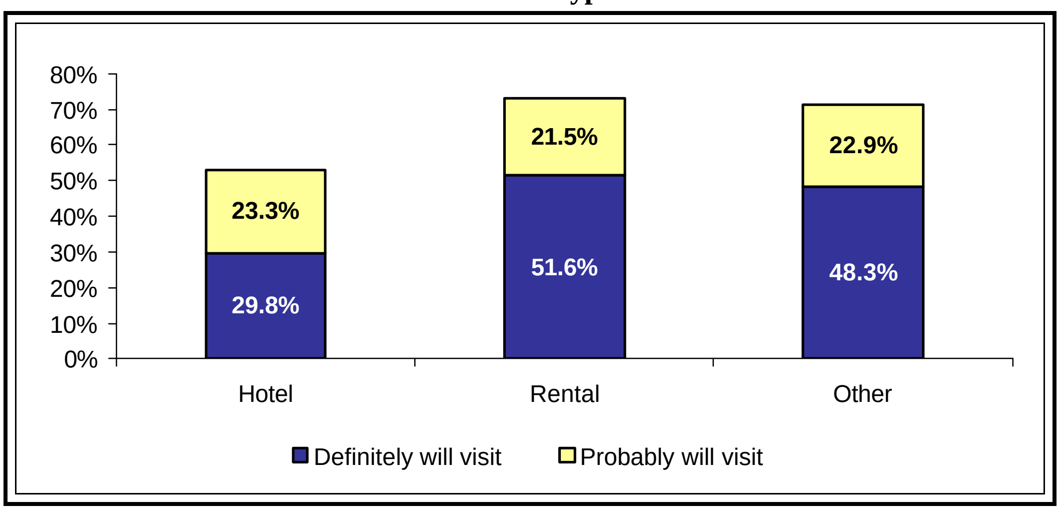
Spring accommodation ratings followed the patterns set in the previous seasons. Again, hotels received lower ratings than other types of accommodation for cleanliness, value, location, and the courtesy/professionalism of the staff.

Accommodation Ratings

	Hotel				Rental				Other			
	Summer	Fall	Winter	Spring	Summer	Fall	Winter	Spring	Summer	Fall	Winter	Spring
Cleanliness	88%	94%	83%	89%	90%	89%	94%	95%	95%	91%	87%	93%
Value	78%	89%	83%	94%	92%	92%	97%	93%	92%	84%	100%	98%
Location	93%	98%	98%	94%	96%	95%	98%	95%	97%	92%	98%	93%
Courtesy	92%	98%	92%	92%	93%	90%	100%	87%	97%	92%	87%	95%

Given this scenario, it would beneficial for the Outer Banks CVB to develop a program which would encourage hotel properties to provide an enhanced visitor experience.

Likelihood to Visit based on Type of Accommodations



KEY FINDINGS

With the addition of data from spring visitors and the overall data, some of the previous findings were confirmed while new information surfaced. It should be noted that the survey samples for winter and spring visitors were smaller than those for summer and fall. While SMARI had a higher success rate, fewer visitors resulted in fewer cards being completed due to off season visitation.

Overall, beaches, accommodations, historic landmarks and scenic areas or drives were primary motivators for visitation. While the beaches were not the primary motivator among winter visitors, they were among spring visitors, who also rated interesting historic landmarks highly. Given that the area's beaches are generally the main draw, even in the off season, beaches should serve as the primary marketing image – coupled with other important attributes, such as quality and unique accommodations.

The Outer Banks Visitors Bureau should work with local hotels / motels to increase visitor satisfaction with their properties. Based on four seasons' of data, those who stayed in a hotel were less likely to return to the area. The Bureau could possibly create incentives for these properties (be it coupon books for local attractions, discounts in the Visitor Center store, free ferry rides, etc.). With these incentives, it should be made clear that they are available only to hotel / motel guests.

The majority of visitors came from Washington DC, Philadelphia PA, and Norfolk-Portsmouth-Newport News, VA. In the spring, more visitors came from the Norfolk VA, Raleigh-Durham, and New York markets, while a notable drop in visitors from Washington DC was recorded. Additional markets, for which the Visitors Bureau does not advertise, drew a greater percentage of travelers in the winter and spring.

First-time visitors were more likely to visit the Outer Banks during the off season. This continues the trend seen in fall, as those who visit in the summer appear to be doing so over and over, while those visiting in the off season are exploring the area for the first time.

The average Outer Banks visitor is white, affluent, married, and college educated. Spring visitors are older than the average visitor; they earn slightly more; and tend to be better educated. In addition, spring visitors are far less likely to have children than summer visitors. The average trip was 6.3 nights in duration, however, the trips taken by spring visitors were the briefest. Dramatic differences are seen in those who travel with children under the age of 16. While 66% of summer visitors traveled with children, 32% of spring visitors traveled with their kids.

The most popular overnight destinations were Nags Head, Kill Devil Hills, and Kitty Hawk. The majority of spring visitors also visited these destinations, however, more spring visitors stayed in Ocracoke than any other visitors.

The types of accommodations used varied by season. Those traveling in the off season were far more likely to use hotel / motel accommodations rather than rental properties. Apparently, this scenario resulted in a drop in visitor satisfaction. Spring visitors who stayed in a hotel were less satisfied with their accommodations and perceived a lack of value in their selections. As such, visitors who used hotel / motel accommodations claimed to be less likely to return to the Outer Banks.

Most visitors to the Outer Banks were very satisfied. Spring visitors reported the highest levels of satisfaction, while winter visitors were the least satisfied. Obviously, satisfied visitors are more likely to return to the area. Visitors whose expectations were exceeded were more likely to say that they would definitely return to the Outer Banks during the next year.

APPENDIX

Customer Satisfaction & Visitation Research Questionnaire

Outer Banks Visitors Bureau
Updated – March 29, 2006

Hello, I'm _______________ calling from Strategic Research. According to our records someone in your household recently visited the Outer Banks of North Carolina where they filled out a brief on-site survey. May I please speak to **(INSERT NAME ON SAMPLE)**?

RE-INTRODUCE IF NECESSARY:

Today/tonight we are conducting a brief telephone survey as a follow-up to your visit to the Outer Banks of North Carolina. Your opinions are very important to the Outer Banks Visitors Bureau so they can develop programs to better serve their visitors.

S1. Did you recently visit the Outer Banks?

1……..Yes
2……...No→THANK AND TERMINATE

IF NO ONE IN THE HOUSEHOLD RECALLS VISITING THE OUTER BANKS THANK & TERMINATE

S2. From which direction did you travel to reach the Outerbanks?

1…North
2…South
3…West

S3. How would you rate the ease of access to the Outerbanks for the interstate/highway system?

1…Very easy
2…Somewhat easy
3…Not easy

1. How many leisure trips that involve staying at least one night away from home did you take during the last 12 months? ______________

2. How many leisure trips that involve staying at least one night away from home do you anticipate taking during the next 12 months? ______________

Now I would like to ask you some specific questions about your travel to the Outer Banks of North Carolina.

3. Did you visit the Outer Banks…..? (ACCEPT MULTIPLES)
   1………..Prior to 2003
   2…………in 2003
   3…………in 2004
   4…………in 2005

4. I'd like you to consider the Outer Banks of North Carolina and rate some of its features as a travel destination. I'd like you to rate the Outer Banks based on your perceptions about how well it provides each of the features we will be discussing. We will be using a 4-point scale where a 4 means that the destination does an excellent job of providing this

attribute and a 1 means that the Outer Banks provides no opportunity for the type of place or activity. How well does the Outer Banks provide…

ROTATE

1............Family attractions
2............Beautiful beaches
3............A clean and safe environment
4…..........Interesting historic sites and landmarks
5............Arts or cultural activities
6............Scenic areas or scenic drives
7............Good restaurants
8............Good shopping opportunities
9............Sporting activities
10..........Fishing opportunities
11..........Good golf courses
12..........Performing & visual arts
13..........Wildlife viewing and bird-watching
14..........Good accommodations

4a. BRING UP ALL ATTRIBUTES THAT WERE RATED A 4 Which of these was most important in your choice of the Outer Banks of North Carolina for your trip?

IF Q3=1,2 OR 3 ASK Q5, 6 & 6A OTHERWISE SKIP TO Q7

5. Consider how the Outer Banks has changed over the past several years. In your opinion has the __________ gotten better, stayed the same, gotten a little worse, gotten a lot worse?

Traffic
Overcrowding
Quality of the beaches
Customer Service
Overdevelopment

1…Gotten better
2…Stayed the same
3…Gotten a little worse
4…Gotten a lot worse

6. Over the past few years do you think that the Outer Banks has…

1………. become a better destination
2………..stayed about the same or
3………..become a worse destination

6a. IF Q6=1 OR 3, ASK Why do you feel that way?

____

Now I'd like to ask some questions about your most recent visit to the Outer Banks of North Carolina.

7. How many nights did you spend in the Outer Banks of North Carolina?
RECORD NUMBER ________

8. Which of the following types of transportation did you use to reach the Outer Banks of North Carolina? **(ACCEPT MULTIPLES)**
   1…Car (or other automobile)
   2…Airplane
   3…Bus (including Bus Tour)
   4…Recreational Vehicle/RV
   5…OTHER #1 (SPECIFY) __________________
   6…OTHER #2 (SPECIFY) __________________

9. Including yourself, how many people, including extended family were on this trip to the Outer Banks of North Carolina? R**ECORD NUMBER ______________**

IF Q9 = 1, SKIP TO Q11

10. How many were children under the age of **16**?
    RECORD NUMBER ______________

11. Where did you stay while you were in the Outer Banks?
    1............Duck
    2............Hatteras Island
    3............Kill Devil Hills
    4............Kitty Hawk
    5............Nags Head
    6............Manteo or Roanoke Island
    7............Southern Shores
    8............Rodanthe
    9............Waves
    10..........Salvo
    11..........Avon
    12..........Buxton
    13..........Frisco
    14..........Hatteras Village
    15..........Other (SPECIFY)__________________

Q11A. Aside from those places where you actually stayed, did you visit any of these other Outer Banks areas for a day trip/excursion during your stay?
]LIST THOSE NOT SELECTED AT Q11 PLUS "None of these"]

12. Which of the following places or activities did you visit or participate in as a part of your trip?
    1…Visit historic sites
    2…Attend musical performances
    3…Attend theater performances
    4…Visit art or cultural museums or galleries
    5…Enjoy scenic beauty
    6…Visit the ocean or beaches
    7…Go hiking or biking
    8…Go camping
    9…Enjoy wildlife viewing/Bird watching
    10…Go fishing
    11…Canoeing or kayaking
    12…Go shopping
    13…Eat at restaurants unique to the area

14…Attend festivals or craft fairs
15…Take scenic drives along the coast
16…Attend or participate in sporting events
17…Golf
18…Play tennis
19…Take Ferry
20…Visit lighthouses & other coastal relics
21…Visit shipwrecks/lifesaving stations
22…Visit the National Parks
23…Other (SPECIFY) _________

12a. ASK IF Q12=10, What type of fishing did you do while in the Outer Banks?

1…….Charter fishing (off-shore)
2…….Pier fishing
3…….Surf fishing

12b. ASK IF Q12=19, Please rate the North Carolina Ferry System in the following areas using a scale of 1 to 5, where 5 indicates excellent, and 1 indicates Poor. You may use any number between 1 and 5.

a. Friendliness of staff
b. Staff's knowledge of local information
c. Appearance of the ferry and its facilities

12c. ASK IF Q12=19 Did you use the ferry to….

1…………Travel to Ocracoke Island as your final destination
2…………Travel to Ocracoke Island and then further south to your final destination
3…………Travel to Ocracoke Island as a daytrip, returning to the Outer Banks

12d. ASK IF Q12=19 If there was a nominal fee to ride the ferry, how likely would you be to use it in the future?

1………….Very likely
2………….Somewhat likely
3………….Not likely

13. Are you aware that the North Carolina Ferry System has a toll-free number for ferry information?
1…………Yes
2…………No

13a. During your most recent visit to the Outer Banks, how many nights did you eat out? ________

14. Which of following types of accommodations did you stay while visiting the Outer Banks?

1…A familiar chain motel or hotel with on-site amenities such as a restaurant or swimming pool
2…A familiar chain motel or hotel without on-site amenities
3…A non-chain motel or hotel with onsite amenities such as a restaurant or swimming pool
4…A non-chain motel or hotel without on-site amenities

5…A Bed & Breakfast
6…A condominium or timeshare
7…A house rental on the beach
8…A house rental not on the beach
9…A Cottage Court
10…A campground or RV
11…A National Park where you camped
12…Family or Friends
13…Other (SPECIFY) ___________________

14a. (ASK IF Q14 = 7 or 8) Why did you choose to stay in a rental home instead of a hotel?
____

15. Overall, how satisfied were you with your accommodations? Would you say…
1…Very Satisfied
2…Somewhat Satisfied
3…Somewhat Dissatisfied
4…Very Dissatisfied

15a How would you rate the value of your accommodations? Would you say your accommodations were a…
1…Great Value
2…Satisfactory Value
3…Less than Satisfactory Value
4…Poor Value

16. Given what you expected of your accommodations when you made your reservations, were the accommodations better, worse, or about the same as you expected?
1…Better
2…Worse
3…About the same

17. Thinking about your accommodations, how satisfied were you with the ____________? Would you say…

A. Cleanliness	1…Very Satisfied
B. Value for the money	2…Somewhat Satisfied
C. Location	3…Somewhat Dissatisfied
D. Courtesy and Professionalism of the Staff	4…Very Dissatisfied

17a. To better understand the economic impact of tourism, we are interested in finding out the approximate amount of money you and other members of your travel party spent on your trip to the Outer Banks. Please estimate how much you spent on each of the following and enter the amounts in whole dollars in the boxes provided.

a. Lodging	________
b. Meals/Food/Groceries	________
c. Entertainment such as shows, theater or concerts	________
d. Shopping	________
e. Transportation	________
f. Attractions	________
g. Other	________

17h. While at the Outer Banks, how interested would you be in using a trolley system that you could ride to get from place to place?
1…Very Interested
2…Somewhat Interested
3…Not very interested
4…Not at all interested →SKIP TO Q33

17i. Would you be willing to pay $1 per day to ride the trolley?
1…Yes →SKIP TO Q33
2…No

18. Did the Outer Banks of North Carolina meet, exceed, or fall short of your expectations of the area?
1…Meet →**SKIP TO Q19**
2…Exceed →**SKIP TO Q19**
3…Fall Short of Expectations

18a. Why do you feel that the Outer Banks fell short of your expectations?
____

19. How likely are you to visit the Outer Banks of North Carolina in the next year for a vacation or leisure trip? Would you say…?
5…Definitely will visit →**SKIP TO Q20**
4…Probably will visit →**SKIP TO Q20**
3…Might or might not visit →**SKIP TO Q20**
2…Probably will not visit
1…Definitely will not visit

19a. Why not? ____

These last few questions are for classification purposes only so that we can group your responses with others that we have interviewed.

20. Are you single or not?
1…Single
2…Not single
3…REFUSED

21. How many adults live in your household?
RECORD NUMBER ______________

22. How many children under the age of 18 are currently living in your household?
RECORD NUMBER ______________

23. Which of the following best represents the last grade of school you completed?
1…Less than high school
2…High school
3…Some college/technical school
4…College graduate
5…Post graduate
6…REFUSED

24. Which of the following categories best represents the total annual income for your household before taxes?
    1…Under $25,000
    2…$25,000 but less than $50,000
    3…$50,000 but less than $75,000
    4…$75,000 but less than $100,000
    5…$100,000 or over
    6…REFUSED

25. Which of the following best describes your ethnic heritage?
    1…Caucasian/White
    2…African American
    3…Hispanic/Latin American
    4…Asian or Pacific Islander
    5…Native American
    6…Other
    7…REFUSED

26. What is your age?
    RECORD NUMBER _____________

THANK RESPONDENT
RECORD GENDER:

1…Male
2…Female

PHONE NUMBER _______________
INTERVIEWER NAME_____________
CUSID____________________________
DATE OF INTERVIEW______________

INITIAL CONTACT CARD

OUTER BANKS NEEDS YOUR HELP!

Please help us by filling out the following information so that we can learn more about our visitors and better serve your needs. No sales effort will ever result from your participation!

- Name ____

- Zip Code __________ Phone # (____)____-________

e-mail address ______________________________________

**You may also be contacted to complete a *short*
10 minute survey for research purposes only.
For providing this information you will be placed in a drawing and be eligible to win $200.

During your stay what kind of accommodations did you use?
(Please check all that apply)

☐ Hotel/motel ☐ Rental Condo/home ☐ Campground
☐ Cottage/Court ☐ Friends or relatives ☐ Inn/B&B

Are you a first time visitor to the Outer Banks? ☐ Yes ☐ No

How long will you be staying in the Outer Banks area? ________ nights

Produced in cooperation with the Dare County Tourism Board

PRIZM$_{NE}$ Clusters

02	Blue Blood Estates	S1 Elite Suburbs	Family Life	The family portrait of suburban wealth, a place of million-dollar homes and manicured lawns, high-end cars and exclusive private clubs. The nation's second-wealthiest lifestyle, characterized by married couples with children, college degrees, a significant percentage of Asian Americans and six-figure incomes earned by business execs, managers, and professionals.
03	Movers & Shakers	S1 Elite Suburbs	Younger Years	Home to America's up and coming business class: a wealthy suburban world of dual-income couples who are highly educated, typically between the ages of 35 and 54, often with children. Given its high percentage of execs and white-collar professionals, there's a decided business bent to this segment: Movers & Shakers rank number one for owning a small business and having a home office.
05	Country Squires	T1 Landed Gentry	Family Life	The wealthiest residents in exurban American live in Country Squires, an oasis for affluent Baby Boomers who've fled the city for the charms of small town living. In their bucolic communities noted for their recently built homes on sprawling properties, the families of execs live in six-figure comfort. Country Squires enjoy country club sports like golf, tennis, and swimming as well as skiing, boating and biking.
06	Winner's Circle	S1 Elite Suburbs	Family Life	Among the wealthy suburban lifestyles, Winner's Circle is the youngest, a collection of mostly 25 to 34 year old couples with large families in new-money subdivisions. Surrounding their homes are the signs of upscale living: recreational parks, golf courses and upscale malls. With a median income of nearly $90,000, Winner's Circle residents are big spenders who like to travel, ski, dine out, shop at clothing boutiques, and take in a show.
07	Money & Brains	U1 Urban Uptown	Mature Years	These residents seem to have it all; high incomes, advanced degrees and sophisticated tastes to match their credentials. Many of these city dwellers - predominantly white with a high concentration of Asian Americans - are married cou0ples with few children who live in fashionable homes on small, manicured lots.
08	Executive Suites	S2 The Affluentials	Younger Years	Consists of upper-middle class singles and couples typically living just beyond the nation's beltways. Filled with significant numbers of Asian Americans and college grads - both groups are represented at more than twice the national average - this segment is a haven for white-collar professionals drawn to comfortable homes and apartments within a manageable commute to downtown jobs, restaurants, and entertainment.
09	Big Fish, Small Pond	T1 Landed Gentry	Mature Years	Older, upper-class, college educated professionals, the members of Big Fish, Small Pond are often among the leading citizens of their small-town communities. These upscale, empty-nesting couples enjoy the trappings of success, belonging to country clubs, maintaining large investment portfolios and spending freely on computer technology.

10	Second City Elite	C1 Second City Society	Mature Years	There's money to be found in the nation's smaller cities, and you're most likely to find it in Second City Elite. The residents of these satellite cities tend to be prosperous execs who decorate their $200,000 homes with multiple computers, large-screen TV's, and an impressive collection of wines. With ore than half holding college degrees, Second City Elites enjoy cultural activities - from reading books to attending theater and dance productions.
11	God's Country	T1 Landed Gentry	Younger Years	When city dwellers and suburbanites began moving to the country in the 70's, God's Country emerged as the most affluent of the nation's exurban lifestyles. Today, wealthier communities exist in the hinterlands, but God's Country remains a haven for upper-income couples in spacious homes. Typically college educated Baby Boomers, these Americans try to maintain a balanced lifestyle between high-power jobs and laid-back leisure.
12	Brite Lites Li'l City	C1 Second City Society	Younger Years	Not all of the America's chic sophisticates live in major metros. Brite Lights Li'l City is a group of well-off, middle-aged couples settled in the nation's satellite cities. Residents of these typical DINK (double income, no kids) households have college educations, well paying business and professional careers and swank homes filled with the latest technology.
13	Upward Bound	C1 Second City Society	Family Life	More than any other segment, Upward Bound appears to be the home of those legendary Soccer Mom's and Dad's. In these small satellite cities, upper-class families boast dual incomes, college degrees and new split-levels and colonials. Residents of Upward Bound tend to be kid-obsessed, with heavy purchases of computers, action figures, dolls, board games, bicycles, and camping equipment.
14	New Empty Nests	S2 The Affluentials	Mature Years	With their grown-up children recently out of the house, New Empty Nests are composed of upscale older Americans who pursue active - and activist - lifestyles. Nearly three-quarters of these residents are over age 65, but they show no interest in a rest home retirement. This is the top-ranked segment for all-inclusive travel packages; the favorite destination being Italy.
15	Pools & Patios	S2 The Affluentials	Mature Years	Formed during the postwar Baby Boom, Pools and Patios have evolved from a segment of young suburban families to one for mature, empty-nesting couples. In these stable neighborhoods graced with backyard pools and patios - the highest proportion of homes were built in the 60's - residents work as white-collar managers and professionals, and are now at the top of their careers.
17	Beltway Boomers	S2 The Affluentials	Famil Life	The members of the postwar Baby Boom are all grown up. Today, these Americans are in their forties and fifties, and one segment of this huge cohort - college educated, upper-middle class and home-owning - is found in Beltway Boomers. Like many of their peers who married late, these Boomers are still raising children in comfortable suburban subdivisions, and they're pursuing kid-centered lifestyles.
18	Kids & Cul-de-Sacs	S2 The Affluentials	Family Life	Upscale, suburban, married couples with children - that's the skinny on Kids & Cul-de-Sacs, an enviable lifestyle of large families in recently built subdivisions. With a high rate of Hispanic and Asian Americans, this segment is a refuge for college-educated, white-collar professionals with administrative jobs and upper-middle class incomes. Their nexus of education, affluence and children translates into large outlays for child-centered products and services.

19	Home Sweet Home	S2 The Affluentials	Younger Years	Widely scattered across the nation's suburbs, the residents of Home Sweet Home tend to be upper-middle class married couples living in mid-sized homes with few children. The adults in this segment, mostly between the ages of 25 and 54, have gone to college and hold professional and white-collar jobs. With their upscale incomes and small families, these folks have fashioned comfortable lifestyles, filling their homes with toys, TV's, and pets.
20	Fast-Track Families	T1 Landed Gentry	Family Life	With their upper-middle class incomes, numerous children and spacious homes, Fast-Track families are in their prime acquisition years. These middle-aged parents have the disposable income and educated sensibility to want the best for their children. They buy the latest technology with impunity: new computers, DVD players, home theater systems and video games. They take advantage of their rustic locales by camping, boating, and fishing.
21	Gray Power	S3 Middleburbs	Mature Years	The steady rise of older, healthier Americans over the past decade has produced one important by-product: middle-class, home-owning suburbanites who are aging in place rather than moving to retirement communities. Gray Power reflects this trend, a segment of older, mid-scale singles and couples who live in quiet comfort.
22	Young Influentials	S3 Middleburbs	Younger Years	Once known as the home of the nation's yuppies, Young Influentials reflect the fading glow of acquisitive yuppiedom. Today, the segment is a common address for young, middle-class singles and couples who are more preoccupied with balancing work and leisure pursuits. Having recently left college dorms, they now live in apartment complexes surrounded by ball fields, health clubs and casual-dining restaurants.
23	Greenbelt Sports	T2 Country Comfort	Younger Years	A segment of middle-class exurban couples, Greenbelt Sports is known for its active lifestyle. Most of these middle-aged residents are married, college educated and own new homes; about one-third have children. And few segments have higher rates for pursuing outdoor activities, such as skiing, canoeing, backpacking, boating and mountain biking.
25	Country Casuals	T1 Landed Gentry	Younger Years	There's a laid-back atmosphere in Country Casuals, a collection of middle-aged, upper-middle class households that have started to empty-nest. Workers here - and most households boast two earners - have well paying blue and white-collar jobs, or own small businesses. Today, these Baby-Boom couples have the disposable income to enjoy traveling, owning timeshares and going out to eat.
27	Middleburg Managers	C2 City Centers	Mature Years	Arose when empty-nesters settled in satellite communities which offered a lower cost of living and more relaxed pace. Today, segment residents tend to be middle-class and over 55 years of age, with solid managerial jobs and comfortable retirements. In their older homes, they enjoy reading, playing musical instruments, indoor gardening, and refinishing furniture.
28	Traditional Times	T2 Country Comfort	Mature Years	The kind of lifestyle where small-town couples nearing retirement are beginning to enjoy their first empty-nest years. Typically in their 50's and 60's, these middle-class Americans pursue a kind of granola and grits lifestyle. On their coffee tables are magazines with titles ranging from Country Living and Country Home to Gourmet and Forbes. But they're big travelers, especially in recreational vehicles and campers.

35	Boomtown Singles	C2 City Centers	Younger Years	Affordable housing, abundant entry-level jobs and a thriving singles scene - all have given rise to the Boomtown Singles segment in fast-growing satellite cities. Young, single and working-class, these residents pursue active lifestyles amid sprawling apartment complexes, bars, convenience stores and Laundromats.
36	Blue-Chip Blues	S Middleburbs	Family Life	Known as a comfortable lifestyle for young, sprawling families with well paying blue-collar jobs. Ethnically diverse - with a significant presence of Hispanics and African-Americans - the segment's aging neighborhoods feature compact, modestly priced homes surrounded by commercial centers that cater to child-filled households.
37	Mayberry-ville	T2 Country Comfort	Younger Years	Like the old Andy Griffith Show set in a quaint picturesque berg, Mayberry-ville harks back to an old-fashioned way of life. In these small towns, middle-class couples and families like to fish and hunt during the day, and stay home and watch TV at night. With lucrative blue-collar jobs and moderately priced housing, residents use their discretionary cash to purchase boats, campers, motorcycles and pickup trucks.
38	Simple Pleasures	T3 Middle America	Mature Years	With more than two-thirds of its residents over the age of 65, Simple Pleasures is mostly a retirement lifestyle: a neighborhood of lower-middle-class singles and couples living in modestly priced homes. Many are high school educated seniors who held blue-collar jobs before their retirement. And a disproportionate number served in the military; no segment has more members of veterans clubs.
39	Domestic Duos	S3 Middleburbs	Mature Years	Represent a middle-class mix f mainly over-55 singles and married couples living in older suburban homes. With their high school educations and fixed incomes, segment residents maintain an easy going lifestyle. Residents like to socialize by going bowling, seeing a play, meeting at the local fraternal order, or going out to eat.
40	Close-I Couples	U2 – Midtown Mix	Mature Years	Close-In Couples is a group of predominantly older, African-American couples living in older homes in the urban neighborhoods of mid-sized metros. High school educated and empty nesting, these 55 year old plus residents typically live in older city neighborhoods, enjoying secure and comfortable retirements.
41	Sunset City Blues	C2 City Centers	Mature Years	Scattered throughout the older neighborhoods of small cities, Sunset City Blues is a segment of lower-middle-class singles and couples who have retired or are getting close to it. These empty-nesters tend to own their homes but have modest educations and incomes. They maintain a low-key lifestyle filled with newspapers and TV by day, and family-style restaurants at night.
42	Red, White & Blues	T3 Middle America	Younger Years	These residents typically live in exurban towns rapidly morphing into bedroom suburbs. Their streets feature new fast food restaurants, and locals have recently celebrated the arrival of chains like Wal-Mart, Radio Shack, and Payless Shoes. Middle-aged, high school educated and lower-middle-class, these folks tend to have solid, blue-collar jobs in manufacturing, milling and construction.
43	Heart-landers	T3 Middle America	Mature Years	American was once a land of small middle-class towns, which can still be found today among Heartlanders. This widespread segment consists of middle-aged couples with working-class jobs living in sturdy, unpretentious homes. In these communities of small families and empty-nesting couples, Heartlanders pursue a rustic lifestyle where hunting and fishing remain prime leisure activities along with cooking, sewing, camping and boating.

45	Blue Highways	T3 Middle America	Younger Years	On maps, blue highways are often two-lane roads that wind through remote stretches of the American landscape. Among lifestyles, Blue Highways is the standout for lower-middle-class couples and families who live in isolated towns and farmsteads. Here, Boomer men like to hunt and fish; the women enjoy sewing and crafts, and everyone looks forward to going out to a country music concert.
46	Old Glories	S4 Inner Suburbs	Mature Years	The nation's downscale suburban retirees, Americans aging in place in older apartment complexes. These racially mixed households often contain widows and widowers living on fixed incomes, and they tend to lead home-centered lifestyles. They're among the nation's most ardent TV fans, watching game shows, soaps, talk shows, and newsmagazines at high rates.
48	Young & Rustic	T4 Rustic Living	Younger Years	Like the soap opera that inspired its nickname, the Young & Rustic segment is composed of young, restless singles. Unlike the glitzy soap denizens, however, these folks tend to be lower income, high school educated and live in tiny apartments in the nation's exurban towns. With their service industry jobs and modest incomes, these folks still try to fashion fast-paced lifestyles centered on sports, cars and dating.
49	American Classics	S4 Inner Suburbs	Mature Years	They may be older, lower-middle-class and retired, but residents of American Classics are still living the American Dream of home ownership. Few segments rank higher in their percentage of home owners, and that fact alone reflects a more comfortable lifestyle for these predominantly white singles and couples with deep ties to their neighborhoods.
56	Crossroad Villagers	T4 Rustic Living	Younger Years	With a population of middle-aged, blue-collar couples and families, Crossroads Villagers is a classic rural lifestyle. Residents are high school educated, with lower-middle incomes and modest housing; one-quarter live in mobile homes. And there's an air of self-reliance in these households as Crossroads Villagers help put food on the table through fishing, gardening and hunting.
58	Back Country Folks	T4 Rustic Living	Mature Years	Strewn among remote farm communities across the nation, Back Country Folks are a long way away from economic paradise. The residents tend to be poor, over 55 years of age and living in older, modest-sized homes and manufactured housing. Typically, life in this segment is a throwback to an earlier era when farming dominated the American landscape.
62	Hometown Retired	C3 Micro-City Blues	Mature Years	With three-quarters of all residents over 65 years of age, Hometown Retired is one of the oldest segments. These racially mixed seniors tend to live in aging homes - one-half were built before 1958 - and typically get by on social security and modest pensions. Because most never made it beyond high school and spent their working lives at blue-collar jobs, their retirements are extremely modest.

VERBATIM COMMENTS

season	*Q6a - Why do you feel that Outer Banks has become a better destination?*
fall	What they have to offer.
fall	Well, more accommodations, eating establishments, shopping areas, and the scenic venues!!
fall	We still enjoy the Outer Banks every year as there are changes but not as drastic as in the Delaware, Maryland and Virginia area beaches. Life is enjoyed more in the south.
fall	We really enjoy the interpretive exhibits that have been developed.
fall	We really enjoy ourselves.
fall	We now visit in early November and there are no crowds!
fall	We love to go to the Outer Banks for the beautiful, clean beaches. Great fishing. It is a wonderful place for a romantic getaway or a family vacation. We have never been bothered or felt unsafe at the Outer Banks on any of our trips there.
fall	We enjoy the area.
fall	Variety of things you can do.
fall	Traffic museum.
fall	This was my fourth trip to the Nags Head & Kill Devil Hills area, and the worst part of the trips in the past was always the long drive across North Carolina (I live near Asheville). The drive was always made worse by the lack of larger highways east of Raleigh.
fall	There is more stuff to do now.
fall	There are more shopping and dining facilities than when I last visited and the customer service at the shops we visited was excellent.
fall	The roads are better.
fall	The lanes have been expanded and it is no longer one lane.
fall	The environment is good; they try hard.
fall	See a lot of things to attract people, history.
fall	Roads are better, added some features.
fall	Restaurants are better and other activities and programs and medical facilities.
fall	Residents and local leaders are realizing the appeal of lovely beaches, great accommodations, varied shops and fine restaurants as opposed to the more common, cheap beach attractions such as t-shirt shops and midway-style entertainments.
fall	Really enjoyed ourselves.
fall	Nothing in particular that stands out just better overall
fall	More to see.
fall	More to do.
fall	More things to do for all age groups; attractions staying open later.
fall	More things to do.
fall	More things to do.
fall	More things there now.
fall	More opportunities and things to do.
fall	More housing and restaurants.
fall	More emphasis on recognizing tourists' needs and working to make the Outer Banks more inviting.
fall	More development.
fall	More conveniently located for reunions.
fall	More attraction roads are better.

fall	More attractions.
fall	More are discovering it.
fall	More activities, places to stay and restaurants.
fall	More accommodations. Less pristine space in the USA.
fall	It is still the peaceful vacation destination that it was 50 years ago!
fall	It is still a much better destination than most resorts on the east coast at less of a cost and easier access.
fall	It is designed for vacationers; all are very nice when you need service. It is a pleasure to vacation at the O.B.
fall	It has grown enough to provide wide choices in lodging, dining, sightseeing, and recreation.
fall	It's very accessible from northern Virginia more so than in the past. It has maintained its historic character. At the same time, the old piers and atmosphere remained the same.
fall	It’s just a nice place you can take the kids and not worry.
fall	If you want to be in some hustle/bustle areas you can stay up around Corolla/ Duck/ Kitty Hawk which makes this part of the Outer Banks more attractive to folks who want to enjoy the laid back atmosphere further down in Buxton, Frisco & Hatteras.
fall	I think that the Outer Banks is perfect for a more laid back vacation. There is plenty to do that doesn’t cost a fortune, you can spend more quality time together as compared to the Jersey shore where you spend more money and not time together.
fall	I simply enjoy the Outer Banks. Yes, the traffic is worse, the overcrowding is worse. I have been traveling sometimes twice a year to the Outer Banks for over the last twenty years, and I will continue to do so while I can, regardless of the conditions.
fall	I really enjoy the warm weather and warmer water in the ocean. The Washington Coast is much colder.
fall	I had not been to the Outer Banks in a few years and found that it was just as fun as the last time I had been there. I especially feel the park staff is great!!!!!
fall	I always loved North Carolina. We plan on moving there one day soon. We always go to the beaches in the Outer Banks. Thank you for asking.
fall	Friendly people, beaches, shops, convenience.
fall	For this time of life.
fall	Everything is cleaner. Customer service is good.
fall	Ease of getting there, more attractions.
fall	Each year there seems a little more to do. Desperately needs evening entertainment for teens & families other than miniature golf.
fall	Each time we visit, we find another place to visit - i.e. restaurants, shops, etc.
fall	Created more to do.
fall	Convenience, short drive, wide range of things to do.
fall	Better value accommodations.
fall	Better than most places in this area.
fall	Better stores and restaurants.
fall	Better restaurants. It also seems to have gotten a lot cleaner.
fall	Better protection of the environment; better attempt to redirect traffic; better attraction opportunities than before.
fall	Been vacationing to the Outer Banks for almost 30 years!
fall	Because they have done so much building, there are more people.
fall	Because of the price of a small area to erect a tent, the price of land has skyrocketed.
fall	Because of different features.

fall	Beaches are better and the traffic is better. The motels are nice.
fall	Ample shopping, historic sights, peaceful.
fall	Although I haven't had much opportunity to visit in the last two years, when I do go to the Outer Banks, I find the people friendly and the fishing and shopping fun. The people, the beaches, and the fishing provide my greatest attraction to the Outer Banks.
fall	All the things to do and see.
fall	A lot more to do.
spring	My husband is impressed with the changes.
spring	I feel like it has plenty of space.
spring	From the years I have been visiting there.
spring	It seems like the beaches have gotten cleaner and the new houses are helping the appearance of the location.
spring	Because some new restaurants have opened, we go there a lot and the way they came back after the hurricanes.
spring	Some of the amenities have been upgraded. It has been modernized.
spring	Restaurants have better hours.
spring	I have visited here often and they appear to be working on keeping it a beautiful place.
spring	Trying to improve the roads and the beaches.
spring	The roads and accommodations have improved. We pick a time to avoid hurricanes.
spring	After the last hurricane, it seemed like everyone was pulling together to get things going again. The preservation of the lighthouses. The range of programs that are available and the park rangers are interesting. The Wright Brothers' memorial has been improved.
spring	We have been there so often. October is a nice time to go because it isn't as crowded and the fishing is good.
spring	There are more restaurants and golf courses.
spring	There are more people and more crime coming into the area.
spring	The traffic. The roads are so crowded. Not a lot of alternative routes.
spring	Because of the overdevelopment.
spring	Because of the overcrowding and way too much over-development.
spring	Because of the growth and commercialism. It has changed the environment. I hope they don't over-commercialize. We used to stay in hotels or houses and now we have a motor home there.
summer	I like the small town atmosphere. I like the community feeling with the houses we have rented --community pool, tennis courts, etc. With a large family, it has provided us with a great family vacation. The houses have been beautiful with great beaches.
summer	New bridge around Manteo & US264 bypass around Knightdale & Wilson.
summer	There are more options for families and singles than ever before.
summer	It seemed like there was more to do. It still is a great place to relax.
summer	The hurricane did a lot of damage and the reconstruction has made some improvements.
summer	Every year it seems to be a little nicer regarding picking up after the hurricanes.
summer	The restaurants have greatly improved. I don't find it's being overdeveloped, which is really important. I don't want to go to a place that has a lot of traffic or people. We stay in Hatteras Village. I would never stay at the opposite end.
summer	The area seems to be adding things that cater to families. More restaurants and accommodations.
summer	Hard to tell whether it is indeed better or it has become more familiar to us. We've found the areas that we feel make for a relaxing vacation and some of our favorites.

summer	We stayed in Avon, North Carolina this year. We were anticipating an even more relaxing experience than when we stayed in Nags Head (which we found).
summer	Just like it.
summer	I have a family now and we enjoyed it very much as a family. We do a lot more now than I had done before.
summer	It is a very popular place and with it they want people to come back.
summer	Live in Raleigh and since 64 has widened, it has helped.
summer	I have been to other beaches, but I always come back to the Outer Banks.
summer	Enjoy, have friends have a good time.
summer	Other places have become busier.
summer	We've always loved the Outer Banks. It became our family tradition after I married and became step dad to two beautiful young girls who have grown to young women and who still love the Outer Banks. I always get this great sense of decompression.
summer	I don’t know. It's a nice place to go with the family. I’m comfortable there. It's just the traffic.
summer	There seems to be more to do so I don't have to drive a lot.
summer	Clean beaches, beach access to vehicles, beaches not crowded (Ocracoke).
summer	Stay longer.
summer	It is a great way to relax.
summer	Get more for your money.
summer	They have the overdevelopment.
summer	The beaches are cleaner and less crowded (if you have a 4x4).
summer	Relaxing family time.
summer	Feel more comfortable with a senior having a hospital close.
summer	I feel that the Outer Banks has become a better vacation destination because it has something that everyone in my family enjoys to do on their vacation. We live in Virginia, so it is close to home (3 1/2 hrs).
summer	I believe that if they keep their restriction on high rises and family visitors it can only improve. New businesses and restaurants have opened that have only enhanced the old favorites. We stay down in south Nags Head where there is little room for more.
summer	Better accommodations and increased activities.
summer	More things to do.
summer	Love the Outer Banks.
summer	More attraction and retail outlets.
summer	It seemed like they are overbuilding, but there is a lot of renovating and improvements to the accommodations.
summer	More accessible, more commercial attraction.
summer	We love the beautiful beaches and the wonderful historical sites and activities. These have definitely improved over the years!
summer	We enjoy the weather, the beaches, the housing availability, the laid back lifestyle of the area. We also enjoy the restaurants and shopping but like that there isn't any honky-tonk. The traffic is getting very heavy in the prime season but isn't bad.
summer	It's a nice place to be.
summer	Lots more stuff to do and I love it.
summer	We love the Outer Banks because it is not an ocean city. The beach houses in upper KDH and KH are great. We are not looking for the new beach houses. It still has that old time beach feel.

summer	Improvements to the water system. Used to drink beer simply because the water was so bad.
summer	We stay in corolla and they have put in a few more stores and gas stations. And completed a bridge.
summer	Because we had a great time with family at our reunion.
summer	It has grown so much. I was happy with the quality of the restaurants and the hotels.
summer	Now have medical facilities.
summer	We enjoyed it more this time. We stayed in Nags head/ Kill Devil Hills this time.
summer	More people are discovering the Outer Banks now than before.
summer	More of my neighbors don't rent they own homes.
summer	There are more local shopping centers for grocery shopping which can be a trifle frustrating with the increasing traffic year after year. There, of course, is additional rental housing which makes the market pretty competitive.
summer	You continue to provide handy ferry service and each year there seem to be one or two new, good restaurants.
summer	At this point in my life and as a resident of the triangle area of North Carolina, the time at the Outer Banks as a volunteer for the national park service at Cape Hatteras light station, provided me with more than I could have desired! I loved it.
summer	Cape Hatteras lighthouse is open again. Beaches seem to be a little better.
summer	Upgrades.
summer	More opportunity even during the off season.
summer	Each time I go I find something else to admire. Personally, I need to spend more time there rather than short 2 or 3 day visits. I hope the development is kept to a minimum.
summer	There are more things for families to do while keeping the attraction of a secluded beach. The local restaurants and stores are fantastic! Don't care for the chain restaurants. It takes away from the unique atmosphere.
summer	I have been coming to the Outer Banks since 1973. My wife and I came there for our honeymoon, her first trip there, in 1984. We return every summer for two weeks. We notice the many developments of other places but enjoy the simplicity and friendliness.
summer	You have more restaurants and more places to shop and stay.
summer	We always like to go to the Outer Banks because there is always something new to do each time we visit. It is a nice getaway for my family as we love the beaches and water activities.
summer	Tourist information center very informative; good advice in each category that we needed information on. Very helpful in getting a choice of good accommodations, which in turn, they called in and reserved for us, etc. Beaches felt safe and comfortable.
summer	They have taken the time to renovate the lighthouses, see to it that the beaches are kept in good shape. They are building but they have done it in a way that it doesn't present the problem of crowding and traffic congestion. It makes it a great place.
summer	There is so much more to offer and do. Beautiful beaches.
summer	There are more opportunities for dining, accommodations, shopping. The beaches remain the most beautiful and clean anywhere in the east.
summer	There are more choices and it is very enjoyable.
summer	The impact of hurricanes Isabel and Alex made many of us who cherish the Outer Banks feel even more connected and appreciative of the islands. We sensed much of the same from the locals over the last two summers.
summer	Still a relaxing destination. The beach was especially clean this year. Also, we tried several new (to us) restaurants this year, and were very pleased.

summer	More opportunities for other activities.
summer	Live there and love it.
summer	It's truly the best beaches on the east coast - better than Florida, Georgia, South Carolina and Virginia. It's definitely the best kept secret!!! Don't tell everyone - they'll overcrowd it like Myrtle Beach and Hilton Head. Yuck.
summer	I think it's great the Outer Banks keeps its beach land uncrowded and business to a minimum. The scenery is certainly why my family and I visit. It's very peaceful, many natural attractions and we, the Barrett family, hopes it will stay natural.
summer	I have no particular reason that I can point too, it just seems a little different.
summer	Hospital is there when you need it.
summer	Exceeded our expectations. You need to have a category for "not interested" or "do not participate" instead or along with "no opportunity." Everything I marked 2 was something I had no interest in.
summer	Enjoy it every time I go.
summer	Easy to get to.
summer	Compared to other areas, it is a better atmosphere.
summer	Compared to other beaches, it is cleaner and more isolated.
summer	Changes.
summer	Better restaurants, more to do for people who are not only fishing. Nicer accommodations in some areas.
summer	Beaches very nice. Lifeguards on duty. Roads are much better, takes less time to get where you want to be. Ferry boats were run extremely well the days that I rode them.
summer	The more we go, the more things we can see.
summer	Generally it is peaceful and quiet.
summer	They are doing much more than just a beach.
summer	Better because of more choices.
summer	Many beaches, attractions.
summer	Ease of shopping.
summer	More facilities and more to do.
summer	More things to do.
summer	More things are available.
summer	Improved roads, the development.
summer	More things are available now.
summer	It wasn't so crowded.
summer	More things to do and not too busy.
summer	Overall experience.
summer	Become popular and it has become a great place to go.
summer	I feel that way because it is serene and a slower pace.
summer	I am comparing to past trips. The service from rental companies has gotten better and there are more activities for young people.
summer	I was raised in the mountains and I believe none of the other areas compare to this area. I have more to choose from.
summer	I have relatives there, but its gotten better but overcrowded, in my opinion.
summer	I feel that it is easy to access, fun and clean.
summer	I feel it's a place that the family can come together.
summer	I feel that it has been a place that is safe for children and very family oriented.
summer	A little more to do.
summer	More to do.

summer	Now there is more to do.
summer	Beaches are cleaner.
summer	Accommodations are better.
summer	More offerings as far as outdoor and sporting activities.
summer	Now more restaurants, shopping, and activities.
summer	The accommodations are better.
summer	It is a quality area with quality people.
summer	Know my way around more.
summer	More people.
summer	More things to do and variety of places to stay.
winter	The new roads are definitely a plus.
winter	The accommodations have gotten a little better.
winter	The shopping experience has gotten better.
winter	We are older and the leisurely pace, good shopping and good restaurants are very attractive to us.
winter	Easier access to the Outer Banks and more restaurants and things to do.
winter	There are a lot of malls and things going up and that will attract a lot of people.
winter	More things to do and see, new sites, convenient.
winter	There are fewer people there than other beaches.
winter	Easier to get to, there is more to do, and the aquariums are better.
winter	The roads are better getting to the Outer Banks.
winter	Some things are more convenient than they were ten years ago.
winter	Some things are more available than before.
winter	Historical sites have been renovated and that is a plus.
winter	There seems to be more things to do.
winter	Affordable, clean and safe, pleasant stay.