



Strategic
Marketing &
Research, Inc.

Outer Banks Visitors Bureau

Visitor Research

Wave 1 & 2 – Summer / Fall 2005

January 2006

Table of Contents

| | |
|---|-----------|
| BACKGROUND & OBJECTIVES | 2 |
| METHODOLOGY | 3 |
| IMAGE OF THE DESTINATION | 4 |
| VISITOR PROFILE | 7 |
| TRIP SPECIFICS | 11 |
| VISITOR SATISFACTION & REPEAT VISITATION | 16 |
| KEY FINDINGS | 20 |
| APPENDIX | 22 |
| CUSTOMER SATISFACTION & VISITATION RESEARCH QUESTIONNAIRE | 23 |
| INITIAL CONTACT CARD | 30 |
| PRIZM _{NE} CLASSIFICATION SYSTEM | 31 |
| VERBATIM COMMENTS | 34 |

BACKGROUND & OBJECTIVES

While the Outer Banks has successfully attracted high levels of visitation, many destinations have enjoyed notable popularity only to see their appeal fade. In fact, success itself can lead to the loss of an area's unique character – and a loss of visitation. The Outer Banks Visitors Bureau wants to learn more about its visitors and their experiences while in the area. To address these informational needs, the Bureau has embarked upon a year-long study. This effort involves gathering the names and contact information for visitors each quarter. Then, a follow-up survey is conducted to gain insight into their visits and attitudes toward the Outer Banks. The objective is to help the Bureau market the amenities of the area and attract additional visitation. This report reflects the second wave of research and includes information relative to summer and fall visitors.

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. As such, the research is being conducted in four waves, which correspond to the seasons. This particular report summarizes the key findings from both Waves 1 and 2 of this research, which includes data for summer and fall visitors.

METHODOLOGY

Key to a Visitor Study is the identification and surveying of a large and representative sample of visitors. These objectives can be accomplished via several methodologies. This research includes an on-site intercept of visitors, with a consequent follow-up survey. Specifically, visitors are intercepted at several locations throughout the Outer Banks area and asked to provide basic information. They are 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 Chesapeake Expressway
- ? Aycock Brown Welcome Center
- ? Wright Brothers National Memorial
- ? NC Ferry Hatteras - Ocracoke
- ? Cape Hatteras Lighthouse
- ? Whalebone Welcome Center
- ? Fort Raleigh National Historic Site
- ? Roanoke Island/OBVB Welcome Center

In total 4,103 people completed the basic survey - 2298 by summer visitors and 1967 by fall visitors. From these, SMARI completed 923 surveys - 465 with summer visitors and 458 with fall visitors.

A copy of the initial contact card and the more detailed survey appear in the Appendix to this report. The longer survey was completed through a combination of on-line and telephone data collection. If an e-mail address was provided, it was used as a first point of contact; this resulted in 495 surveys. An additional 428 surveys were conducted via telephone. This sample size provided results with an accuracy of +/- 3.2%. This survey will be conducted throughout two additional quarters for a total sample size of at least 1600, providing accuracy of +/-2.3%.

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 both summer and fall 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 implicate 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.

Generally, the Outer Banks earned very strong ratings. Five (5) attributes earned strong ratings and just three (3) 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.

Lower ratings are noted for arts / cultural activities, performing / visual arts and good golf courses. Of course, it will be important to determine the impact of these perceived "weaknesses" in generating visitation.

Attribute Ratings On 4-point Scale

| Attributes | Summer | Fall |
|--|--------|------|
| Beautiful beaches | 3.9 | 3.7 |
| A clean & safe environment | 3.7 | 3.7 |
| Scenic areas or scenic drives | 3.6 | 3.7 |
| Interesting historic sites / landmarks | 3.6 | 3.7 |
| Good accommodations | 3.6 | 3.5 |
| Fishing opportunities | 3.4 | 3.0 |
| Good restaurants | 3.4 | 3.4 |
| Family attractions | 3.4 | 3.2 |
| Wildlife viewing & bird-watching | 3.3 | 3.1 |
| Good shopping opportunities | 3.2 | 3.1 |
| Sporting activities | 3.1 | 2.7 |
| Arts or cultural activities | 2.6 | 2.6 |
| Performing & visual arts | 2.4 | 2.3 |
| Good golf courses | 2.2 | 2.2 |

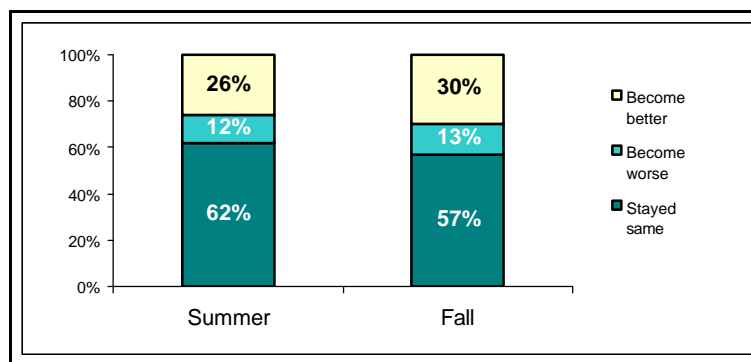
To assess the relative importance of these factors in motivating travel, the respondents were asked to identify those factors which were most important to their choosing to visit the Outer Banks. This exercise helps to identify the attributes which “motivate” the trip and what characteristics differentiate the Outer Banks from other vacation options. Among both summer and fall visitors, the area’s beautiful beaches were the primary influencer. Among fall visitors, however, beaches were less influential and interesting historic sites and landmarks, scenery and good accommodations were more important. Note that shopping, golf courses, arts/cultural activities and visual/performing arts were *not* motivators to visitation.

Motivations for Visiting the Outer Banks

| Visited for... | Summer | Fall |
|--|--------------|--------------|
| Beautiful beaches | 50.4% | 34.0% |
| Interesting historic sites / landmarks | 8.3% | 19.3% |
| Scenic areas or scenic drives | 9.0% | 13.3% |
| Good accommodations | 7.6% | 11.0% |
| A clean & safe environment | 9.4% | 9.1% |
| Fishing opportunities | 5.2% | 5.1% |
| Family attractions | 4.7% | 2.8% |
| Good restaurants | 2.0% | 2.8% |
| Wildlife viewing & bird-watching | 1.3% | 1.4% |
| Sporting activities | 1.3% | 0.5% |
| Good shopping opportunities | 0.4% | 0.5% |
| Good golf courses | 0.0% | 0.2% |
| Arts or cultural activities | 0.2% | 0.0% |
| Visual or performing arts | 0.0% | 0.0% |

Premier destinations are challenged with maintaining visitors’ satisfaction with their product. As a destination develops – especially if its appeal is scenic beauty - its unique charm can be lost. Consequently, respondents who had visited the Outer Banks before were asked to indicate whether the destination is improving, deteriorating or staying the same. Most summer and fall visitors said that the area is staying the same, and more people indicated improvement over decline.

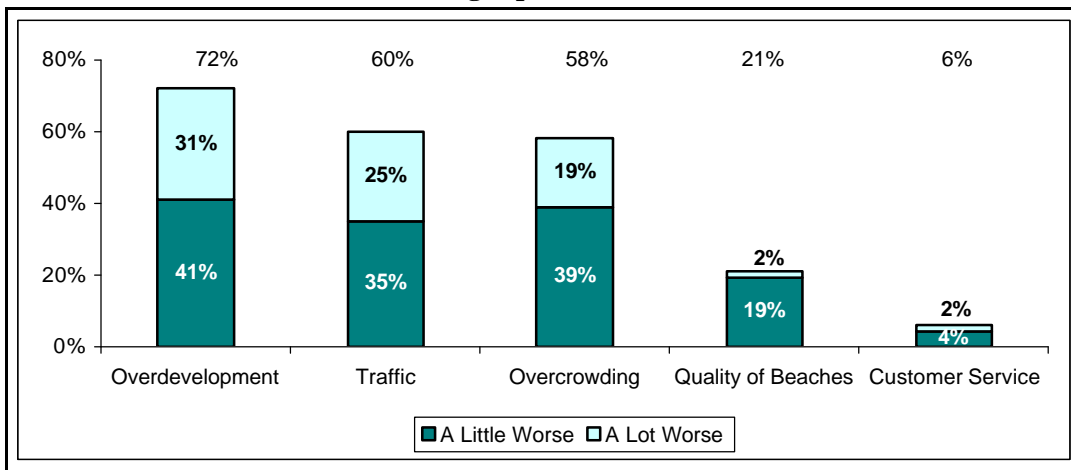
Outer Banks has...



Those who said that the destination has either changed for the better or the worse were asked to explain the rationale for their answer. Those with positive perceptions said that the beaches were beautiful and the atmosphere relaxed, and that there were more things to do and places to eat. Those with more negative perceptions said that traffic had worsened and that the area is overdeveloped. (Copies of verbatim responses appear in the Appendix.)

While visitors generally believe that the area has maintained or improved its appeal, there is a pervasive sense among both summer and fall visitors that traffic, overcrowding and overdevelopment is closing in. Fortunately, few people believe that the quality of the beaches or the level of customer service has gone downhill. While many seem to perceive deterioration in these areas, they do not believe that the destination as a whole has deteriorated. Nonetheless, these issues need to be monitored and, whenever possible, controlled to maintain the area's relaxed and laid back charm.

**Perceptions of Changes to 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 could influence marketing efforts or other aspects of travel. This wave allows the comparison of summer visitors to fall visitors.

Where are visitors coming from and which markets are generating the highest levels of visitation to the Outer Banks? Interestingly, the profile of cities for the fall is identical to that for summer. Visitors are coming from the same cities; specifically, Washington DC, Philadelphia and Norfolk are the most important markets. Overall, nineteen (19) markets represented almost 70% of summer visitors and 63% of fall visitors. Traditional east coast and Midwest destinations were most prevalent.

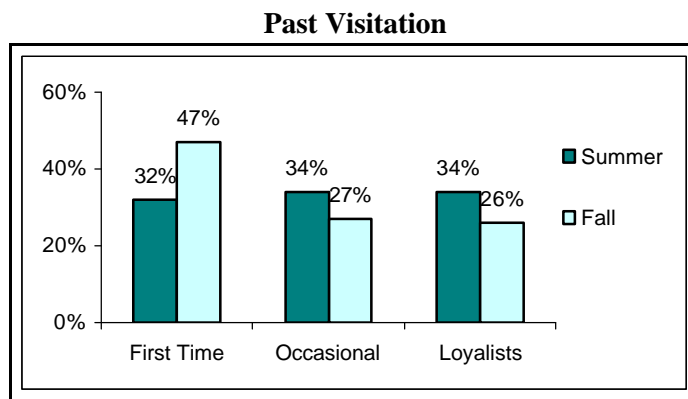
Origin of Visitors

| City of Origin | Summer | Fall |
|--|--------------|--------------|
| Washington, DC (Hagerstown, MD) | 11.2% | 11.2% |
| Philadelphia, PA | 7.2% | 8.4% |
| Norfolk-Portsmouth-Newport News, VA | 6.5% | 7.2% |
| Richmond-Petersburg, VA | 5.6% | 4.9% |
| Baltimore, MD | 5.1% | 4.8% |
| Pittsburgh, PA | 4.9% | 2.2% |
| New York, NY | 4.8% | 5.2% |
| Raleigh-Durham (Fayetteville), NC | 4.5% | 3.3% |
| Harrisburg-Lancaster-Lebanon-York, PA | 3.2% | 2.3% |
| Charlotte, NC | 3.1% | 1.9% |
| Greenville-New Bern-Washington, NC | 2.6% | 1.4% |
| Roanoke-Lynchburg, VA | 2.0% | 1.8% |
| Cleveland, OH | 2.0% | 2.2% |
| Greensboro-High Point-Winston Salem, NC | 1.7% | 1.4% |
| Wilkes Barre-Scranton, PA | 1.3% | 1.1% |
| Hartford & New Haven, CT | 1.2% | 1.0% |
| Boston (Manchester), MA-NH | 1.1% | 1.0% |
| Cincinnati, OH | 1.1% | 1.0% |
| Columbus, OH | 1.1% | 1.0% |
| Total | 69.9% | 63.3% |

Demographically, these visitors tended to be Caucasian, married, well educated and earners of upscale incomes. The demographic profile of fall visitors was older, slightly less upscale and they were less likely to have children.

| Demographics | Summer | Fall |
|---------------------------------------|----------|----------|
| Age | 47 | 53 |
| Income | \$82,331 | \$77,757 |
| Marital Status | | |
| Single | 13% | 14% |
| Not single | 86% | 86% |
| % With Kids | 51% | 26% |
| Last Grade of School Completed | | |
| High school or less | 10% | 14% |
| Some college/tech school | 22% | 29% |
| College graduate | 37% | 33% |
| Post graduate | 31% | 24% |
| Ethnic Heritage | | |
| Caucasian/White | 93% | 94% |
| African American | 1% | 2% |
| Hispanic/Latin American | 1% | 1% |
| Asian or Pacific Islander | 1% | 1% |
| Native American | 1% | 1% |
| Other | 3% | 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 years and prior to 2003. Occasional visitors visited in 2005 and at least one time prior. During the summer, the split was



fairly even, though a higher percentage of First-time visitors came in the fall, with equal decreases for Occasional visitors and Loyalists. Perhaps First-time visitors are more likely to explore the Outer Banks during the off-season. As such, customer service needs to remain high throughout the year. Of note, First-timers are coming from the same established markets (as shown in the geographic profile) – rather than from new markets. Apparently, these markets offer potential, and the Outer Banks can attract more visitors from these areas.

The demographic profile of all three groups is similar, although First-timers are better educated. As with First-time visitors in the summer, those in the fall included a wider range of ethnic groups, perhaps indicating that the profile is beginning to change or that non-Caucasian visitors turn up once and do not return. This trend should be tracked; currently, however, the key audience is overwhelmingly Caucasian.

Demographics of Visitor Profiles

| Demographics | First-time Visitors | Occasional Visitors | Loyalists |
|---------------------------------------|----------------------------|----------------------------|------------------|
| Age | 52 | 55 | 53 |
| Income | \$75,500 | \$76,848 | \$83,641 |
| Marital Status | | | |
| Single | 14% | 14% | 13% |
| Not single | 86% | 86% | 87% |
| % With Kids | 26% | 22% | 30% |
| Last Grade of School Completed | | | |
| High school or less | 13% | 17% | 14% |
| Some college/tech school | 26% | 27% | 31% |
| College graduate | 35% | 27% | 38% |
| Post graduate | 26% | 29% | 17% |
| Ethnic Heritage | | | |
| Caucasian/White | 92% | 96% | 97% |
| African American | 3% | 0% | 2% |
| Hispanic/Latin American | 1% | 2% | 0% |
| Asian or Pacific Islander | 1% | 1% | 0% |
| Native American | 2% | 2% | 1% |
| Other | 2% | 0% | 0% |

Visitors can also be profiled via the PRIZM_{NE} system, which classifies people by their zip code. The system classifies people by 66 groups based on where they live. 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).

Among summer visitors, the profile shows that seventeen (17) groups represent 50% of the visitors surveyed for this study. Each group is more prevalent among Outer Banks visitors than would be expected based on their representation in the population. Information about each group is included in the Appendix. Here, a few noteworthy findings: 1) the majority of clusters represent small town and rural areas and none are urban clusters. Visitors to the Outer Banks seem to come from small towns rather than urban and suburban areas, 2) while many visitors to the Outer Banks travel with children, the clusters without children in the home - both younger and older - predominate.

The profile for fall visitors is quite similar, as eighteen (18) groups represent 52.4% of these visitors in total. In most cases, the groups are the same as those seen in the summer. The prevalence of groups without children is even a bit stronger among fall visitors.

While Outer Banks visitors are fairly upscale relative to education and income, they are not necessarily sophisticated. Instead, they are more traditional, heartland households, which may explain the appeal of the area's relaxed pace and scenic beauty. Since the profile for both summer and fall visitors is similar, this reinforces the overall profile and suggests that it represents Outer Banks visitors overall. While these data will be tracked through the other seasons, this provides a strong picture of current visitors.

PRIZM_{NE} Profiling Summer Visitors

| # | Cluster Name | Outer Banks | Index | Density | Lifestage |
|----|------------------------|-------------|-------|---------|-----------|
| 9 | Big Fish, Small Pond | 4.9% | 231 | T | M |
| 28 | Traditional Times | 4.9% | 182 | T | M |
| 5 | Country Squires | 3.7% | 215 | T | F |
| 37 | Mayberry-ville | 3.6% | 159 | T | Y |
| 13 | Upward Bound | 3.4% | 222 | C | F |
| 38 | Simple Pleasures | 3.0% | 120 | T | M |
| 43 | Heartlanders | 2.7% | 135 | T | M |
| 58 | Back Country Folks | 2.7% | 111 | T | M |
| 3 | Movers & Shakers | 2.7% | 169 | S | Y |
| 25 | Country Casuals | 2.6% | 194 | T | Y |
| 11 | God's Country | 2.4% | 163 | T | Y |
| 27 | Middleburg Managers | 2.4% | 129 | C | M |
| 12 | Brite Lites, Li'l City | 2.4% | 160 | C | Y |
| 15 | Pools & Patios | 2.3% | 189 | S | M |
| 45 | Blue Highways | 2.3% | 138 | T | Y |
| 20 | Fast-Track Families | 2.1% | 143 | T | F |
| 32 | New Homesteaders | 2.0% | 109 | T | F |

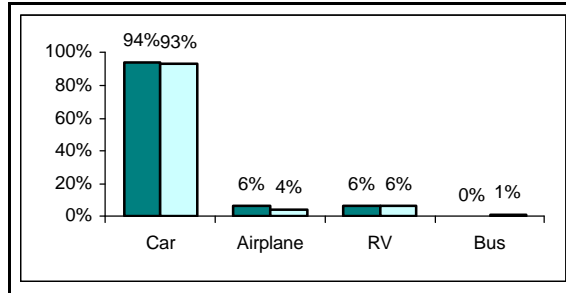
PRIZM_{NE} Profiling Fall Visitors

| # | 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 |

TRIP SPECIFICS

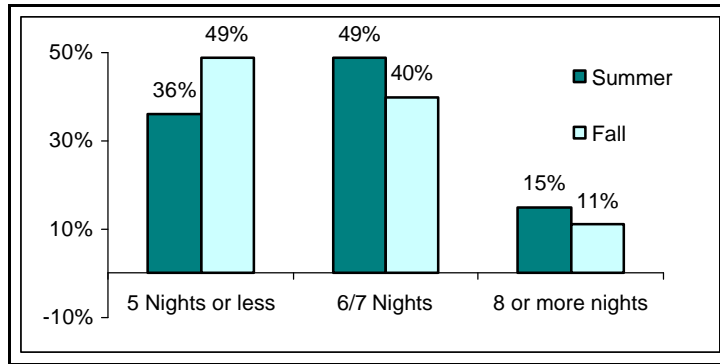
The survey provides insight into the details of visitors' trips to the Outer Banks. They reported details ranging from transport to what they did and how much they spent. Generally, visitors drove to the Outer Banks - 94% in the summer and 93% in the fall. The prevalence of people flying into the area was lower during the fall - just 4%.

Transportation to the Outer Banks



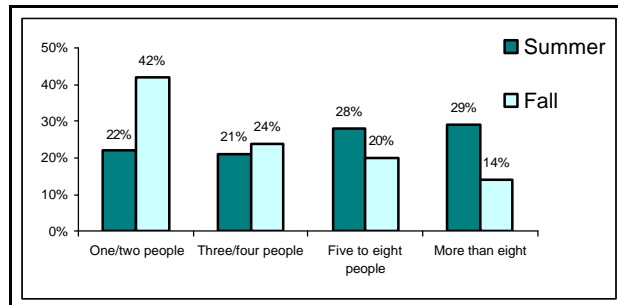
The average summer trip was 6 nights in duration, with almost two-thirds of visitors staying at least 6 nights. Fall trips averaged 5.4 nights, and half the respondents reported staying 6 days or longer. In fact, during the fall, 32% of trips were 3 nights or less. First-time visitors tended to stay an average of 3 to 4 nights.

Duration of Stay

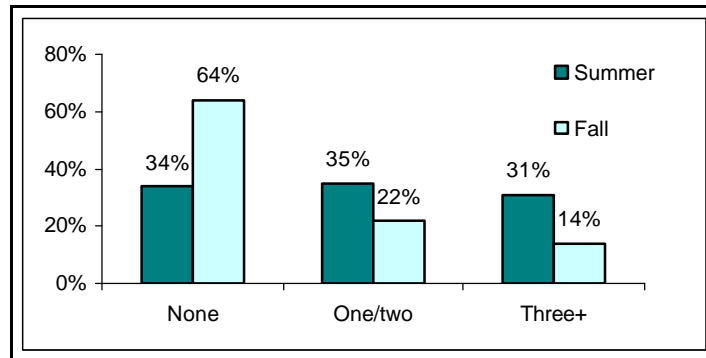


Travel party size also changed significantly in the fall - the average party size was 7 people in the summer and just 5 in the fall. And, while trips with children were dominant in the summer (64% included a child of 16 or under), in the fall, just 36% included children 16 or younger. A strong variation is noted in the number of people in the travel party by type of accommodations used. On average, those who used rental properties reported an average travel party size of 6.9, while those using hotels had travel parties averaging 3.5 people. For those using other types of accommodations, the party size averaged 3.4 people.

Travel Party Size



Traveled with Children Younger than 16



While Nags Head was the most frequented location during the summer, it was second among fall visitors, with Kill Devil Island the most popular. Again, visitors stayed in a variety of towns and villages in the Outer Banks. They were much more likely to report visiting Kill Devil Island, Kitty Hawk and Ocracoke and less likely to visit Corolla Light, Buxton and Manteo or Roanoke Island.

Stayed During Visit to Outer Banks

| Destination | Summer | Fall |
|--------------------------|--------|------|
| Kill Devil Hills | 14% | 20% |
| Nags Head | 20% | 18% |
| Kitty Hawk | 9% | 15% |
| Duck | 12% | 11% |
| Avon | 6% | 7% |
| Hatteras Island | 7% | 6% |
| Corolla Light | 8% | 5% |
| Ocracoke | 1% | 4% |
| Buxton | 5% | 3% |
| Southern Shores | 4% | 3% |
| Rodanthe | 3% | 3% |
| Waves | 2% | 3% |
| Manteo or Roanoke Island | 4% | 2% |
| Hatteras Village | 2% | 2% |
| Salvo | 1% | 2% |
| Frisco | 4% | 1% |

Among fall visitors, the use of rental homes was strong – but not as strong as during the summer. While over half the visitors reported renting a home during the summer, this number dropped to 41% for fall visitors. Also, in the fall, rental homes on the beach became more popular than those located elsewhere – no doubt due to cost and the opportunity to stay on the beach for less money. Another interesting trend during the fall was the increase in usage of condominiums and timeshares as well as the usage of familiar chain hotels with amenities. During the fall, 52% of visitors leased a rental home, 27% stayed in a hotel/motel property and 21% camped or used other accommodations.

The research among summer visitors suggested that the use of rental properties was heavier among past visitors. This was again the case for fall visitors. Overall, 39% of First-time visitors stayed in a rental home, with 35% choosing a hotel/motel property. When Loyalists are considered, 73% used a rental home and only 11% stayed in a hotel/motel. This finding suggests that new visitors are extremely important to the hotel/motel properties, as they tend to lose visitors to rentals on repeat visits. This also means that First-time visitors are much more likely to experience the Outer Banks in a hotel property, and this may impact their interest in future visitation.

Type of Accommodation Used

| Accommodations | Summer | Fall |
|---|---------------|-------------|
| A house rental on the beach | 23% | 24% |
| A house rental not on the beach | 28% | 17% |
| A condominium / timeshare | 5% | 17% |
| A familiar chain motel or hotel with on-site amenities, e.g., restaurant or swimming pool | 8% | 16% |
| A non-chain motel / hotel with on-site amenities, e.g., restaurant or swimming pool | 7% | 9% |
| A campground or RV | 11% | 8% |
| A familiar chain motel or hotel without on-site amenities | 3% | 7% |
| A non-chain motel / hotel without on-site amenities | 6% | 4% |
| Family or friends | 4% | 4% |
| A bed & breakfast | 3% | 3% |
| A cottage court | 2% | 2% |
| A National park where you camped | 5% | 1% |
| Other | 3% | 1% |

In considering how to motivate visitation, it is important to know what visitors choose to do while staying in the Outer Banks. Some of the top activities included visiting the ocean or beaches, enjoying scenic beauty, eating at unique restaurants and visiting historic sites. Generally, participation levels in activities were lower in the fall, in part because trips were shorter. The more popular activities among fall visitors included visiting historic sites, taking scenic drives, taking the ferry and playing golf.

A specific question was included regarding the number of nights that people dined out. The average was 3.6 nights (average duration of trip – 5.4 nights). In fact, fall visitors reported a higher percentage of nights dining out (67%) versus summer visitors (53%). This is probably because the travel parties were smaller during the fall, and it also may reflect greater ease in getting into restaurants. This number is similar across accommodation types, with those in hotel/motel properties dining out 3.7 nights, those in rental properties dining out 3.7 nights, and those in other types of accommodations dining out 2.8 nights.

Activities with low levels of participation included tennis, and musical/theatrical performances. The activities that showed the largest decline in participation from summer to fall were canoeing/kayaking and fishing.

Activities during Trip

| Activity | Summer | Fall | Difference |
|---|--------|-------|------------|
| Visit the ocean / beaches | 97.0% | 92.9% | -4.1% |
| Enjoy scenic beauty | 89.6% | 88.7% | -0.9% |
| Eat at restaurants unique to area | 85.5% | 82.8% | -2.7% |
| Visit historic sites | 71.4% | 78.6% | 7.2% |
| Visit lighthouses / other coastal relics | 77.7% | 76.0% | -1.7% |
| Take scenic drives along the coast | 74.4% | 75.8% | 1.4% |
| Shopping | 77.2% | 72.9% | -4.3% |
| Visit the National Parks | 59.7% | 57.4% | -2.3% |
| Enjoy wildlife viewing/Bird watching | 46.2% | 42.4% | -3.8% |
| Take ferry | 34.3% | 38.1% | 3.8% |
| Go hiking or biking | 36.2% | 30.4% | -5.8% |
| Go fishing | 36.0% | 25.2% | -10.8% |
| Visit art or cultural museums / galleries | 26.2% | 24.5% | -1.7% |
| Visit shipwrecks/lifesaving stations | 22.3% | 19.8% | -2.5% |
| Surf fishing | 20.4% | 14.6% | -5.8% |
| Golf | 7.2% | 8.7% | 1.5% |
| Pier fishing | 12.3% | 8.3% | -4.0% |
| Go camping | 13.9% | 8.2% | -5.7% |
| Attend festivals or craft fairs | 8.7% | 7.8% | -0.9% |
| Canoeing or kayaking | 15.6% | 5.4% | -10.2% |
| Attend / participate in sporting events | 8.2% | 4.7% | -3.5% |
| Charter fishing | 11.6% | 4.4% | -7.2% |
| Attend theater performances | 5.9% | 3.8% | -2.1% |
| Attend musical performances | 6.1% | 3.1% | -3.0% |
| Play tennis | 2.8% | 1.6% | -1.2% |

A final trip specific to consider is the money that visitors spent while visiting the Outer Banks. The fall trips were still fairly long, but shorter than those taken by summer visitors. They also involved smaller travel parties. Therefore, the total trip expenditures were significantly lower - \$1,641 for fall visitors versus \$2,691 for summer visitors. However, the average per person/per day rate was the same - \$61.

The distribution of expenditures for both fall and winter was similar, although visitors spent a higher percentage of their money for lodging in the summer and a higher percentage for food and shopping in the fall.

Visitors' Expenditures

| | Summer | | Fall | |
|---|----------------|-----|----------------|-----|
| Lodging | \$1,468 | 55% | \$827 | 50% |
| Meals/Food/Groceries | \$471 | 17% | \$340 | 21% |
| Entertainment, e.g., shows/theater/concerts | \$57 | 2% | \$23 | 1% |
| Shopping | \$284 | 11% | \$228 | 14% |
| Transportation | \$253 | 9% | \$139 | 8% |
| Attractions | \$83 | 3% | \$49 | 3% |
| Other | \$75 | 3% | \$35 | 2% |
| Total | \$2,691 | | \$1,641 | |
| Per person/per night | \$61 | | \$61 | |

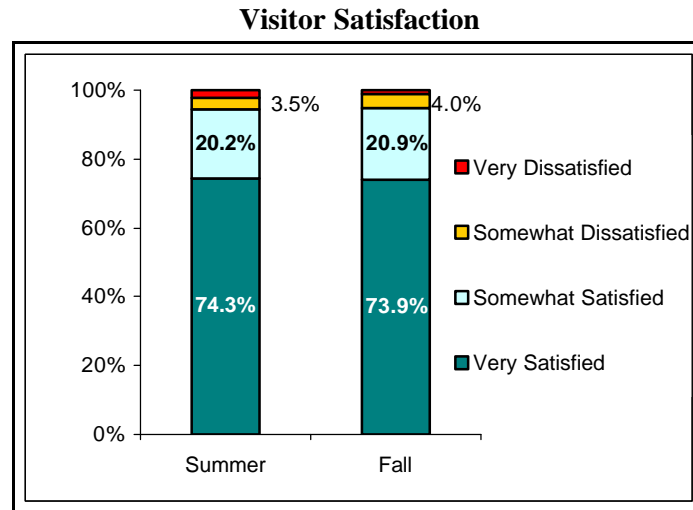
In this context, it is noteworthy that those who used rental properties reported the highest overall trip expenditures, with the average being over \$2,200. This is largely because they traveled with more people and took longer trips. They actually spent less per person/per night than those who used hotel/motel accommodations. This partially explains why people move toward rental properties. They are able to include more people and take more time, and still keep the costs somewhat lower.

Visitors' Expenses

| Expenses for... | Hotel | Rental | Other |
|---|--------------|----------------|--------------|
| Lodging | \$341 | \$1,251 | \$253 |
| Meals/Food/Groceries | \$212 | \$438 | \$239 |
| Entertainment, e.g., shows/theater/concerts | \$24 | \$23 | \$24 |
| Shopping | \$131 | \$296 | \$161 |
| Transportation | \$111 | \$161 | \$116 |
| Attractions | \$43 | \$52 | \$50 |
| Other | \$27 | \$38 | \$40 |
| Total | \$888 | \$2,258 | \$883 |
| Per person/per night | \$69 | \$46 | \$78 |

VISITOR SATISFACTION & REPEAT VISITATION

A goal of this research was to measure visitor satisfaction with the Outer Banks, and to identify ways to increase satisfaction. The overall level of satisfaction was high - and similar for both summer and fall visitors.



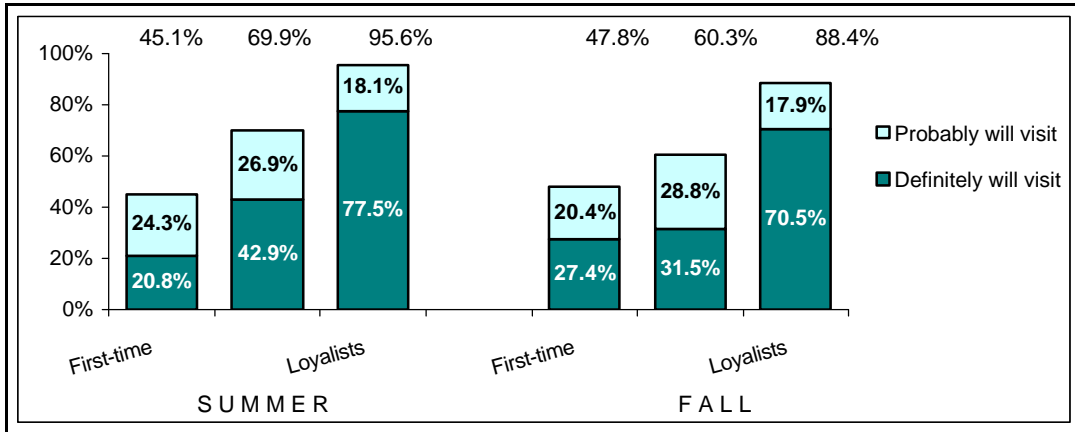
Yet, even with high levels of satisfaction, one of the biggest challenges that destinations face is how to create loyal visitors. Increasingly, consumers want to try something new and different – gone are the days when the majority of people visited the same place at the same time every year. There is much more of an attitude of “done that/been there.” This was evident when people were asked why they were not planning to visit in the next year. Some typical responses included:

- ? *There are many other places I wish to visit.*
- ? *There are too many other areas to visit in our great country with our limited time.*
- ? *We’ve been there!*

As a result, a destination has to provide an exceptional level of service and satisfaction to create truly loyal visitors. Understanding the current situation for the Outer Banks is critical and can help identify ways to increase satisfaction, loyalty and repeat visitation.

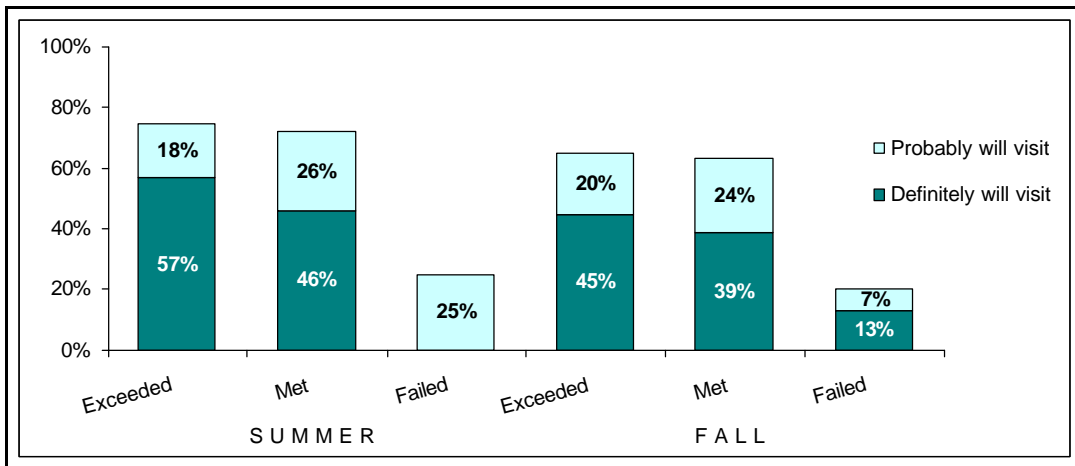
This trend is evident when visitors were asked about their likelihood to return in the next year. For summer visitors, over 75% of Loyalists indicated that they would definitely visit. This number falls to 70.5% among fall visitors. So, even for a group that has visited the area over multiple years, one cannot assume that they will continue to visit. Repeat visitation – at least in the short term – is even harder to generate among Occasional and First-time visitors. In fact, only 27% of First-time visitors from the fall survey indicated that they will definitely return. The challenge for the Outer Banks is to either find an increasing number of new visitors or to generate higher levels of repeat visitation.

Likelihood to Visit



As noted, one way to generate visitation is to provide a positive experience. This is reinforced by the findings which indicate that by exceeding expectations, the Outer Banks can generate a higher level of repeat usage. Those visitors who indicated that their expectations were exceeded were much more likely to say that they will definitely visit in the next year. The most important number to track is the percentage that says they will definitely return, which ranges from 45% for those whose expectations were exceeded to 13% among those where there was an expectation failure.

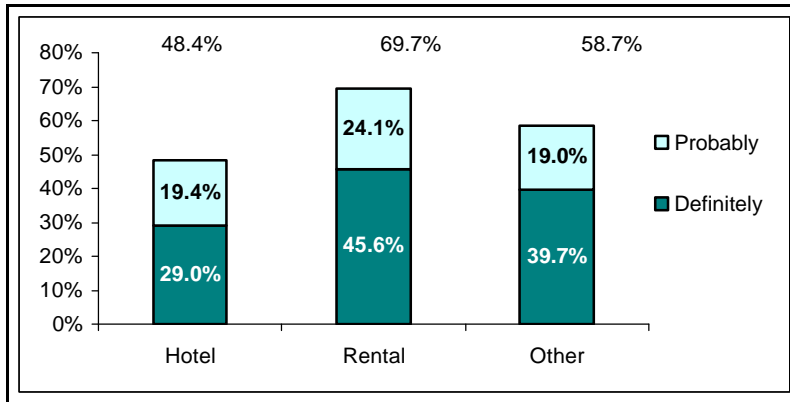
Likelihood to Visit in Next Year by Level of Expectations



The reasons listed for the Outer Banks not meeting visitors' expectations varied by traveler and included those who considered the area overdeveloped and those who wanted more things to see and do.

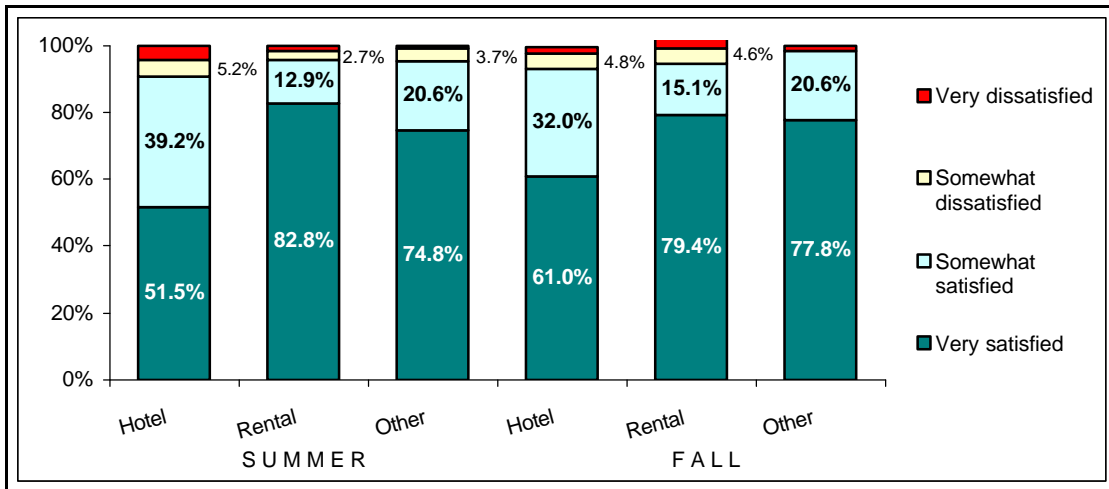
One issue that seemingly influences satisfaction and intent to return relates to the type of accommodations used. Visitors who used rental properties and other types of accommodations were much more likely to say that they would return in the next year.

Likelihood to Return by Accommodation Type



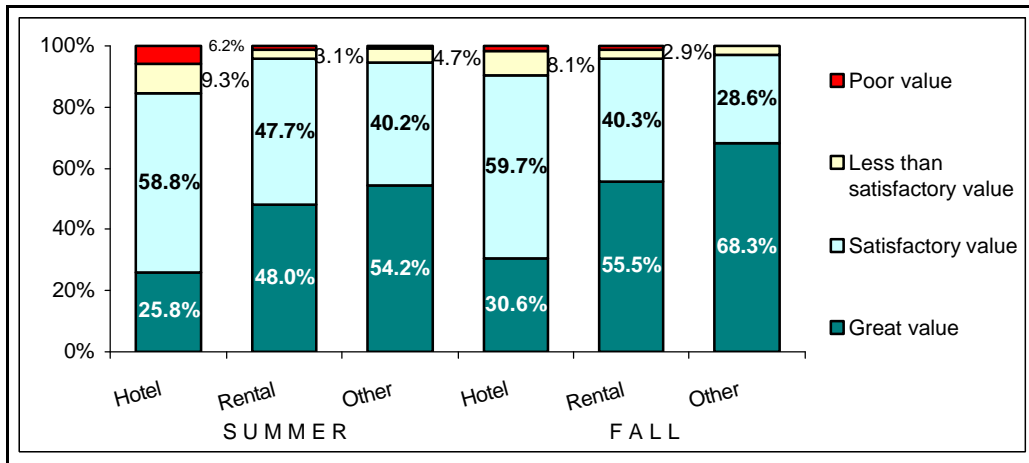
In part, this is because those who used rental and other types of accommodations were more satisfied than those who stayed in hotel/motel properties. Since more of the First-time visitors stayed in hotel/motel properties, their return visitation may be jeopardized. While the sample sizes for those using hotel/motel properties versus rental properties are not huge, the differences in satisfaction are statistically significant.

Satisfaction by Type of Accommodations Used



Among both summer and fall visitors, the hotel/motel properties seem to be suffering from weak value perceptions, with less than a third of respondents believing that they received a great value.

**Perceptions of Value
by Type of Accommodation Used**



Visitors were also asked to rate their accommodations for cleanliness, value for the money, location and the courtesy/professionalism of the staff. With summer visitors, there was a strong difference in perceptions of value, with hotels lagging. However, among fall visitors, the perceptions of hotel properties were much stronger – and on par with rentals.

Accommodation Ratings

| | Hotel/Motel | | Rental | | Other | |
|-------------|-------------|------|--------|------|--------|------|
| | Summer | Fall | Summer | Fall | Summer | Fall |
| Cleanliness | 88% | 94% | 91% | 89% | 94% | 91% |
| Value | 77% | 89% | 93% | 92% | 92% | 84% |
| Location | 94% | 98% | 95% | 95% | 96% | 92% |
| Courtesy | 91% | 98% | 93% | 90% | 97% | 92% |

Yet, while the ratings for the hotel properties are on par with rentals among fall visitors – the overall satisfaction and value ratings are not. Something is depressing satisfaction among this audience.

KEY FINDINGS

This report includes findings from the first two waves of surveying, covering summer and fall visitors. Some trends are becoming clearer, and while final recommendations should await the results of the total study, the Outer Banks Visitors Bureau can begin drawing some conclusions about its visitors.

Among both summer and fall visitors, the beaches were a key motivator for visitation. While the beaches were the overwhelming motivation for summer visitors, they were also the strongest motivator for fall visitors. At the same time, fall visitors were also motivated by historic sites, scenic beauty and good accommodations. This suggests that the beaches need to be the focus for marketing; however, depending upon the season, the other attributes should serve as the secondary focus.

For the Outer Banks, a key issue is maintaining visitor satisfaction as the destination develops and changes. Among both summer and fall visitors the percentage of people that said the destination has worsened is fairly small, but many visitors believe that traffic, overcrowding and overdevelopment have worsened. The perceptions of fall visitors are similar to summer visitors, which is interesting as traffic and other problems lessen in the fall.

The Outer Banks continues to attract a fairly high percentage of First-time visitors, especially in the fall. Among summer visitors, there was a fairly equal split between First-timers, Occasional visitors and Loyalists. During the fall, nearly half the visitors were First-timers, indicating that people are more likely to “try” the Outer Banks during this season. The high percentage of First-time visitors will help build visitation over time. Nonetheless, this finding highlights the fact that it is critical to maintain high levels of visitor satisfaction during the fall, as this will impact repeat visitation and growth in visitation.

Major differences are noted in fall trips relative to duration and travel party composition. About half the fall trips were 5 nights or less, with the average trip being 5 days. Additionally, only one-third of the trips (versus two-thirds) included children. Fall trips tended to be adults and smaller travel parties, equating to lower levels of expenditures overall.

Satisfaction among fall visitors was similar to that of summer visitors. In both cases, the level of satisfaction was high. Despite high levels of satisfaction, generating repeat visitation will be a challenge.

Perhaps one of the biggest challenges for the Outer Banks will be generating repeat visitation. The competition is fierce and many people like to explore new places. The research shows that it is critical to meet or exceed expectations to generate any likelihood of return. Therefore, the area must focus on satisfaction and ways to make the destination appealing enough to generate repeat visitation.

Among summer visitors, there was an issue regarding satisfaction with hotel/motel accommodations as compared to rental properties and other accommodation options. This was still somewhat the case among fall visitors, and those who used hotels and motels were less satisfied. The reasons for lower satisfaction are less clear among fall visitors, although there were some less positive perceptions relative to value.

It is interesting to note that while there were many more First-time visitors in the fall, the profile of visitors was quite similar to that of summer visitors. Visitors are upscale and educated, and many came from the east coast and New England. As in the summer, most were from small towns and rural areas and did not tend to represent sophisticated households. Rather, they represented more traditional, heartland-type households from small towns and rural areas. Fall visitors were a bit older, with slightly lower levels of income and education.

APPENDIX

Customer Satisfaction & Visitation Research Questionnaire

Outer Banks Visitors Bureau Final – October 5, 2005

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

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 you 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? **RECORD 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) _____

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 _____

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} CLASSIFICATION SYSTEM

| # | Cluster Name | Outer Banks % | Index | Density | Lifestage |
|----|------------------------|---------------|-------|---------|-----------|
| 9 | Big Fish, Small Pond | 4.9% | 231 | T | M |
| 28 | Traditional Times | 4.9% | 182 | T | M |
| 5 | Country Squires | 3.7% | 215 | T | F |
| 37 | Mayberry-ville | 3.6% | 159 | T | Y |
| 13 | Upward Bound | 3.4% | 222 | C | F |
| 38 | Simple Pleasures | 3.0% | 120 | T | M |
| 43 | Heartlanders | 2.7% | 135 | T | M |
| 58 | Back Country Folks | 2.7% | 111 | T | M |
| 3 | Movers & Shakers | 2.7% | 169 | S | Y |
| 25 | Country Casuals | 2.6% | 194 | T | Y |
| 11 | God's Country | 2.4% | 163 | T | Y |
| 27 | Middleburg Managers | 2.4% | 129 | C | M |
| 12 | Brite Lites, Li'l City | 2.4% | 160 | C | Y |
| 15 | Pools & Patios | 2.3% | 189 | S | M |
| 45 | Blue Highways | 2.3% | 138 | T | Y |
| 20 | Fast-Track Families | 2.1% | 143 | T | F |
| 32 | New Homesteaders | 2.0% | 109 | T | F |
| | | 50.2% | | | |

PRIZM_{NE} Clusters

| | | | | |
|----|----------------------|------------------|---------------|--|
| 03 | Movers & Shakers | S1 Elite Suburbs | Younger Years | Home to America's up & coming business class: a wealthy suburban world of dual-income couples who are highly educated, typically between the ages of 35 & 54, often with children. Given its high percentage of execs & white-collar professionals, there's a decided business bent to this segment: Movers & Shakers rank number one for owning a small business & 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, & swimming as well as skiing, boating & biking. |
| 09 | Big Fish, Small Pond | T1 Landed Gentry | Mature Years | Older, upper-class, college educated professionals, 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 & spending freely on computer technology. |
| 11 | God's Country | T1 Landed Gentry | Younger Years | When city dwellers & 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 & 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 & professional careers & 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 & Dad's. In these small satellite cities, upper-class families boast dual incomes, college degrees & new split-levels & colonials. Residents of Upward Bound tend to be kid-obsessed, with heavy purchases of computers, action figures, dolls, board games, bicycles, & camping equipment. |
| 15 | Pools & Patios | S2 The Affluentials | Mature Years | Formed during the postwar Baby Boom, Pools & 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 & patios - the highest proportion of homes were built in the 60's - residents work as white-collar managers & professionals, & are now at the top of their careers. |
| 20 | Fast-Track Families | T1 Landed Gentry | Family Life | With their upper-middle class incomes, numerous children & spacious homes, Fast-Track families are in their prime acquisition years. These middle-aged parents have the disposable income & educated sensibility to want the best for their children. They buy the latest technology with impunity: new computers, DVD players, home theater systems & video games. They take advantage of their rustic locales by camping, boating, & fishing. |
| 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 - & most households boast two earners - have well paying blue & white-collar jobs, or own small businesses. Today, these Baby-Boom couples have the disposable income to enjoy traveling, owning timeshares & 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 & more relaxed pace. Today, segment residents tend to be middle-class & over 55 years of age, with solid managerial jobs & comfortable retirements. In their older homes, they enjoy reading, playing musical instruments, indoor gardening, & 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 & 60's, these middle-class Americans pursue a kind of granola & grits lifestyle. On their coffee tables are magazines with titles ranging from Country Living & Country Home to Gourmet & Forbes. But they're big travelers, especially in recreational vehicles & campers. |

| | | | | |
|----|--------------------|--------------------|---------------|---|
| 32 | New Homesteaders | T2 Country Comfort | Family Life | Young, middle-class families seeking to escape suburban sprawl find refuge in New Homesteaders, a collection of small rustic townships filled with new ranches & Cape Cods. With decent paying jobs in white-collar & service industries, these dual-income couples have fashioned comfortable, child-centered lifestyles, their driveways filled with campers & powerboats, their family rooms with PlayStations & Game Boys. |
| 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 & families like to fish & hunt during the day, & stay home & watch TV at night. With lucrative blue-collar jobs & moderately priced housing, residents use their discretionary cash to purchase boats, campers, motorcycles & 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 & 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. |
| 43 | Heartlanders | 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 & empty-nesting couples, Heartlanders pursue a rustic lifestyle where hunting & fishing remain prime leisure activities along with cooking, sewing, camping & 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 & families who live in isolated towns & farmsteads. Here, Boomer men like to hunt & fish; the women enjoy sewing & crafts, & everyone looks forward to going out to a country music concert. |
| 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 & living in older, modest-sized homes & manufactured housing. Typically, life in this segment is a throwback to an earlier era when farming dominated the American landscape. |

VERBATIM COMMENTS

| Season | Q6a - Why do you feel that Outer Banks has become a better destination? |
|---------------|--|
| 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 & US 264 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. The beaches are |
| 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 for the cove |
| 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 we've 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, NC this year. We were anticipating an even more relaxing experience than when we stayed in Nags Head (which we found). So, recalling the development we witnessed in Nags Head vs. being somewhat removed from that in Avon, I'd say anyone can |
| summer | Just like it |
| summer | I have a family now and we enjoyed it very much as a family. We did a lot more now than I had done |
| summer | It is a very popular place and with it they want people to come back |
| summer | Live in Raleigh and 64 has widened has helped |
| summer | I have been to other beaches 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 and because |
| 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 don't have to drive a lot |
| summer | Clean beaches, beach access to vehicles, beaches not crowded (Ocracoke) |
| summer | Stay longer |
| summer | It was a great way to relax |
| summer | Get more for your money |
| summer | They have the over development |

| Season | Q6a - Why do you feel that Outer Banks has become a better destination? |
|---------------|--|
| summer | The beaches are cleaner and uncrowded (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 doing on vacation. We live in Virginia, so it is close to home (3 1/2 hrs) and after the vacation, we feel like we've been |
| 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 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 life style 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 off s |
| 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 n |
| summer | Because had great time with family reunion |
| summer | It has grown so much. I was happy with the quality of the restaurants and the hotels. The quality |
| summer | Now have medical facilities |
| summer | We enjoyed it more this time. We stayed in nags head/kill devil hill this time, last time it was in |
| 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. |

| Season | Q6a - Why do you feel that Outer Banks has become a better destination? |
|--------|---|
| 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 because |
| 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 of OBX |
| 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 that |
| summer | You have more restaurants and more places to shop and stay. |
| summer | We always like to go to the Outer Banks, always something new to do each time we visit. It is a nice getaway for my family as we love the beaches there 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 even |
| 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 to |
| 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. That said, we are quite distressed by t |
| 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 |

| Season | Q6a - Why do you feel that Outer Banks has become a better destination? |
|--------|--|
| summer | It's truly the best beaches on the east coast - better than FL, GA, SC and VA. 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 beaches 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, hope 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 area it is a better atmosphere. |
| summer | Compare to other beaches cleaner and the isolation |
| summer | Changes |
| summer | Better restaurants, more to do for people who are not only fishing...nicer accommodations in some areas |
| summer | Beaches very nice. Life guards 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. |
| fall | What they have to offer, |
| fall | Well...more accommodations...eating establishments...and 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 NC (I live near Asheville). The drive was always made worse by the lack of larger highways east of Raleigh, but o |
| fall | There are 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. |

| Season | Q6a - Why do you feel that Outer Banks has become a better destination? |
|---------------|--|
| 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 attraction 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 of things to do |
| fall | More housing and restaurants |
| fall | More emphasis on recognizing tourists' need 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 attraction |
| 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 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 ob. |
| 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. |

| Season | Q6a - Why do you feel that Outer Banks has become a better destination? |
|--------|--|
| 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 don't want enjoy the laid back atmosphere further down in Buxton, Frisco & Hatteras. We live |
| fall | I think that the Outer Banks is perfect for a more laid back vacation there is plenty to do that don't cost a fortune spend more quality time as compared to jersey shore where you spend more money and not time together |
| fall | I simply enjoy the Outer Banks - yes, the traffic is worse,, the over crowding 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 condition |
| 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 NC. We plan on moving there one day soon. We always go to the beaches in the Outer Banks. Thank you foe asking. Mary Boraski |
| 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 attraction |
| 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. Restaurant, shops, etc. |
| fall | Created more do |
| fall | Convenience, short drive, wide range of things to do |
| fall | Better value accommodations |
| fall | Better than most place in his area. |
| fall | Better stores and restaurants |
| fall | Better restaurants, it 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 |

| Season | Q6a - Why do you feel that Outer Banks has become a <i>better</i> destination? |
|--------|--|
| 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 bank |
| fall | All the things to do and see |
| fall | A lot more to do |

| Season | Q6a - Why do you feel that Outer Banks has become a worse destination? |
|--------|---|
| summer | The pricing has outpaced the value. The locals take advantage of tourist dollars by significantly gouging when vacationers are there. We have been visiting for over 22 years and are for someplace that is not as crowded and a value the way it was 10 years ago. |
| summer | It has a lot to offer but so many people come from out of state now that it's hard to enjoy it. The quality and quaintness of the Outer Banks has been destroyed by so much commercializing and overcrowding. |
| summer | We started visiting in 1988 and while you expect development, the majority of new houses under construction are huge ugly monstrosities (there is no charm of the older houses particularly in the Nags Head area). So many of the houses are so big that the |
| summer | More crowded |
| summer | Too many people to much building |
| summer | I've been coming to the Outer Banks for over 20 years. I'm disappointed that some of the older restaurants are gone and some old standards (i.e. Port of Call) do not provide the quality of service and food that they used to. We really Miss Clara's in Ma |
| summer | The crowding that has occurred, specifically from Nags Head down to Hatteras. We really only go to Ocracoke anymore as the development there is limited due to the national wildlife refuge land north of the town. |
| summer | I've been vacationing here since 1980. It's becoming overdeveloped with huge houses that become noisy and spoil the quiet, relaxing atmosphere. Too much development spoiling the beaches and pristine atmosphere. |
| summer | I have been vacationing on the Outer Banks with my family for almost 30 years. There is over construction on every tiny piece of property at the expense of scenery and wildlife. Behemoth houses are being built even at the tip of the cape. The Outer Banks |
| summer | Because of overcrowding, traffic, shopping center sprawl, etc |
| summer | Because of the national park services restricting beach access to certain areas, for some birds. This is not the way to have people return. If it continues I will find another place to spend my vacations! |
| summer | Too much build up of more residential houses and too many strip malls. |
| summer | Overcrowding!!!!!!! |
| summer | Too much junk that we made the drive to get away from |
| summer | The ability to get there and get around has gotten worse. The time there has stayed the same. So the overall experience gets worse due to the traffic. Most particularly, arrival and the ability to obtain groceries. |
| summer | Wish there would be no more development |
| summer | Too populated. Liked when there was less - better. Looking for other places to get that again |

| Season | Q6a - Why do you feel that Outer Banks has become a worse destination? |
|--------|---|
| summer | Traffic...there have been trips that we were stuck on the highways for hours bumper to bumper...one year it took an hour to cross the bridge...we are starting to wonder if it is still worth the trip. |
| summer | Crowds and lack of accommodations - especially restaurants |
| summer | Businesses are more focused on getting a customer's money that in providing a good service. There are many businesses but most of them offer the same boring things often too over priced and of no interest to most. The food selection also has a lot to be d |
| summer | Quite simply because of the beach closures. That alone will cause me to reconsider ever coming back. |
| summer | So much development |
| summer | Too crowded/ over building, traffic a problem |
| summer | It seems over the past few years that we have been unable to catch anything from off shore - not sure if this is due to the commercial fishing coming more in shore or not (we usually visit the Hatteras Island area). Secondly, we would love to see more all |
| summer | Traffic |
| summer | Too commercial |
| summer | The traffic is worse |
| summer | The traffic and overdevelopment |
| summer | The overdevelopment in the area is atrocious. That development (particularly the monstrosities that pass for houses but which are hotels) has obscured a once beautiful view and has put far too many people in the Hatteras area. |
| summer | The overcrowding |
| summer | Overcrowding, commercialism, cost of visiting |
| summer | Overcrowding |
| summer | Over developed and too crowded. Been going there for years and the southern, laid back way is gone. |
| summer | Over crowding and increase in price of rentals. |
| summer | It has been oversold and there are too many people coming there the traffic is ridiculous and the amount of housing that has built up there is very bad with little to no future planning strategy. I have been coming since 1960 and I can not see any improve |
| summer | Building to much |
| fall | We use to go to get away from everything. Now Ocracoke is our last bastion of seclusion. |
| fall | We started going to the Outer Banks about 10 years ago. I know that prices have gone up everywhere but, they have gone up so much in the last 2/3 years, that we are just about priced out . Mainly lodging. |
| fall | Very overcrowded, some of the beaches are dirty with litter, and the foreign exchange students seem very rude in all different fields from restaurants to stores |
| fall | Traffic too congested |

| Season | Q6a - Why do you feel that Outer Banks has become a worse destination? |
|--------|--|
| fall | Traffic |
| fall | Too tourist looking, very limited with things, too expensive |
| fall | Too much development. The northern part e.g. Duck and corolla are better because it doesn't have so much business. We prefer a quieter atmosphere. |
| fall | Too many mega-homes are being built. It will soon be fiscally challenging for a couple or empty nesters to afford to come. The motels are gone and few smaller properties exist. 2 people can't afford to rent a 5-bedroom house. I know the Outer Banks bills. |
| fall | There is way too much development happening. We used to stay in the northern Outer Banks (Whalehead, Corolla, Ocean Sands); however, the cost of housing rentals has skyrocketed. We are now staying in the southern Outer Banks (Salvo, Rodan the, waves) when |
| fall | The Outer Banks has sacrificed nature and its peaceful atmosphere, as well as its financial accessibility for the less than well to do for the sake of the almighty dollar. At the rate that commercialism is taking over the Outer Banks, it'll be another oce |
| fall | Overdevelopment |
| fall | Overdevelopment |
| fall | Overcrowding |
| fall | Overcrowding, overbuilding, increase rental cost, crime, traffic problems |
| fall | Overcrowded, scenery has changed, too much development |
| fall | Overcrowding & traffic |
| fall | Over development, particularly of the northern beaches is a travesty. The northern beaches are the home of the wild horses, last of the open spaces, where they can roam. These open spaces and the horses represent the very essence of what bring visitors |
| fall | Over developed |
| fall | Over crowded. |
| fall | Not as nice as it was in the 60's. There are more people |
| fall | It still has a lot of wilderness. |
| fall | It is over crowded |
| fall | It has lost that out of the way feeling. |
| fall | I have been traveling to the Outer Banks every-year, sometimes multiple times per year, since 1980. We have stayed in rental homes, motels and campgrounds from corolla to Okrakoke. We love the Outer Banks but, the past ten years has seen a significant change |
| fall | I do not like the ridiculous houses that only serve to hurt the beauty and life of the region. Development should run along the lines of sustainability, not making a quick, cheap buck on flimsy houses that will just fall down in the next big storm. This |

| Season | Q6a - Why do you feel that Outer Banks has become a worse destination? |
|--------|--|
| fall | I believe that the accommodations are beginning to price themselves out of the market -- for example if I am coming from jersey there has to be enough of a differential in price and quality of environment to make the long drive otherwise might as well stay |
| fall | Highways |
| fall | Coastal beach areas are becoming limited. Outer banks continue to develop more and more at a greater and greater expense. Rental real estate taxes, the wide range in methods to determine security deposits and even a registration fee, which should be included |
| fall | Because of the overcrowding |
| fall | Because it is overcrowded, beaches are not as good as before, no improvement in dining or culture |
| fall | Beach erosion/ traffic/ congestion/ particular north of highway 64 |
| fall | After an absence of 8 years, this is not the same Outer Banks I have loved for 30 years. The houses have taken over everything: long stretches of scenic drives are destroyed, motels are disappearing, and access to the beach is extremely limited. Hotels are |

| Season | Q14a - Why did you choose to stay in a rental home instead of a hotel? |
|---------------|---|
| summer | With a large family we all wanted to be together. We were able to eat all of our meals together and not worry about a wait at local restaurants. A house provides us with a private pool and hot tub. |
| summer | Weekly rental, more rooms, washer/dryer, kitchen |
| summer | We were with a large family group and wanted to stay together under one roof |
| summer | We were traveling with a few families |
| summer | We were invited to stay with friends who rented the house |
| summer | We were in a hotel and our friends had friends that didn't show up so they invited us to stay with them in the rental home |
| summer | We wanted to stay in a house with a private pool. |
| summer | We use to rent from a non-chain motel. We learned that they also rented homes through this motel. Its great accommodations for extended families |
| summer | We think that it is cheaper, and offers more freedom than a hotel. |
| summer | We stayed in the same house two years ago. |
| summer | We stay for a week and want the amenities that come with a home. |
| summer | We preferred to rent a house, cook our on food and fell like at home a hotel isn't really our way to travel |
| summer | We like to prepare our own meals. The atmosphere is more relaxing at a rental house. We enjoyed the views of the sound. We've stayed at houses for the last 14 years. |
| summer | We like to cook and barbecue, we like to eat family style, and we enjoy family activities. |
| summer | We like the space of a rental home plus all the amenities. We go as a big group and the house accommodates all of us. We can split the cost and make it affordable. |
| summer | We like the feeling of having our 'own home' while there. |
| summer | We like rental home accommodations so that we can all be together and eat together if we didn't want |
| summer | We like Hatteras Village. There are more rental homes than hotels. We like the privacy of a rental home. We always cook breakfast and do our laundry so the rental home is a better fit for us. |
| summer | We know the owners |
| summer | We have eight group better deal |
| summer | We have always stayed in rental cottages. |
| summer | We have always stayed in a rental house. To be close to the beach, large space for family and a kitchen |
| summer | We have a family group and we like to cook most of our meals together. We also prefer not to deal with the noise of the other occupants. |
| summer | We had a large group of people. A house is much easier with children. |
| summer | We had a large group of people. |
| summer | We enjoy the privacy |

| Season | Q14a - Why did you choose to stay in a rental home instead of a hotel? |
|---------------|---|
| summer | We enjoy the feeling of a home away from home. We like having plenty of living space and having a kitchen etc. |
| summer | We enjoy fishing on the beach and cooking them ourselves. We have quite a large family with older children coming and staying with us and my mother for a week, we like the homey feel to it. Though the house usually has more than our home in Pennsylvania |
| summer | We brought our dogs |
| summer | We are part of an extended family that loves to accommodate anyone who is willing to make the drive to OBX. So, sharing a space like that is way more fun than having your own little room. After all, if you need to escape the family scene out there, you have |
| summer | We are a large group and we like to stay together. We like to cook and want a kitchen. It is a biggy. |
| summer | We all enjoy the privacy and ease of a rental home. |
| summer | We actually stayed in a rental condo. We needed the ability to cook full means and the condo also afforded us more room for those days when we just wanted to hang out inside. Also it was important to us to have both an ocean view and a pool on site. |
| summer | Was a trade timeshare |
| summer | Wanted the atmosphere of a house |
| summer | Wanted more of a home feeling without the intrusion of maid service, etc. |
| summer | Wanted big family together; needed equipped kitchen |
| summer | Wanted a situation where we were able to interact with our entire family freely. The closeness and the intimacy we wished were better achieved by renting a house as opposed to a hotel or motel. |
| summer | Wanted a family atmosphere |
| summer | Total of 10 people and we enjoy living as we do at home, eating when and what we want, not having the room made up every day, etc. |
| summer | Too many people, wanted to cook and have space |
| summer | Too many people, family reunion |
| summer | To have more room and conveniences like dishwashers, washer dryers. We also like the privacy. |
| summer | To be on the beach and all of us together in one house -16 of us and we could cook our own food. W |
| summer | To be close to the family |
| summer | There were not many hotels to choose from, but the few that were there did not look inviting. |
| summer | There didn't seem to be hotels in the area we wanted to stay. |
| summer | The space. I'd rather be in a home rather than a hotel or motel. So we could all be together. |
| summer | The privacy and your own place |
| summer | The people we went with they have been going for years and they do it that way |
| summer | The number of people and comfortable accommodations provided. |

| Season | Q14a - Why did you choose to stay in a rental home instead of a hotel? |
|---------------|--|
| summer | The last time we stayed, it was in a hotel. Other than that, we normally stay in a rental home for several reasons. The comfort aspect is the largest reason. There are usually quite a few of us that stay. We enjoy the space that a rental home offers. |
| summer | The homey feeling and ability to come and go to the beaches and eat and rest when we pleased. It was the most economical way for all the family to stay. |
| summer | The family wanted to be all together in one place |
| summer | The family could all be together |
| summer | Ten people the size |
| summer | Stay with relatives and they rent the home |
| summer | Space for the amount of people |
| summer | Space and cost |
| summer | Space and convenience like cooking at home |
| summer | Space |
| summer | So we could stay with our group of friends |
| summer | So we could cook for ourselves and save money. Also with 15 in our party it's tough to find a hotel at the same rate. |
| summer | So many people/ try big family atmosphere |
| summer | So many people |
| summer | So many of us |
| summer | So all the family and relatives could stay together. We also wanted a kitchen so we could all enjoy meals together without the expense of eating out all the time. |
| summer | Size of house for all of us to be under one roof. Space, feel of a home, and eat in, beach close by, able to drink at home and price, parking next to house. |
| summer | Size of party. |
| summer | Size of party |
| summer | Size of group |
| summer | Sister owns her home |
| summer | Seems like there is more space. The hotel the people are sleeping so can't do other things while the |
| summer | Saw it on the internet |
| summer | Roomy |
| summer | Room |
| summer | Room |
| summer | Rented house so my kids and grand kids could come and stay with us |
| summer | Private, accommodation or better |
| summer | Private pool and rec area - family gathering and cooked for ourselves. Time together |
| summer | Private pool |
| summer | Privacy. Parking. Kitchen. Cost. |

| Season | Q14a - Why did you choose to stay in a rental home instead of a hotel? |
|--------|--|
| summer | Privacy, comfort and ease of and expanded modes of use (i.e. cooking) the beach areas attenuating rental home areas tend to be less crowded and closer to nature preserves and other undeveloped areas. |
| summer | Privacy and more room. Also able to cook meals and do laundry |
| summer | Privacy the closeness to the beach |
| summer | Privacy and space for us all |
| summer | Privacy and access to beach, number of bedrooms/bathrooms |
| summer | Privacy and a homier atmosphere. |
| summer | Privacy & convenience |
| summer | Prices lower |
| summer | Price and convenience / 15 people all toll |
| summer | Price & value vis a vis: size of the accommodations, ability to cook breakfasts & prepare lunches for trips to beach or Ocracoke, convenience to fishing - at least until the plover chicks appeared at the point, a dock for two kids to crab & fish from, under |
| summer | Price |
| summer | Overall, felt it was a better value since it provided more living space for two families to be together and we could prepare our own breakfasts, lunches and some dinners. |
| summer | Our son is on a special diet that requires that we prepare nearly all of his food. No restaurants in the area offer gluten free food options. |
| summer | Our party numbered 28 -- we rented two houses to accommodate everyone in the extended family. |
| summer | Our oldest daughter wanted to work on Ocracoke for the summer (Ocracoke coffee shop). We wanted to spend our vacation there, had always visited for day trips but never stayed. We combined the two, rented nana's house for 9 or 10 weeks. It was more reasonable |
| summer | Our friends own a beach house, we get a good deal and it's right on the beach. |
| summer | Our friend owns the beach house and rents it out to us every year. |
| summer | One of my kids has a cat |
| summer | Number of people in party and wanted a homey atmosphere, also the amenities |
| summer | Number of people |
| summer | Number of family members needed to accommodate kitchens laundry facilities |
| summer | Not many vacancies |
| summer | Not enough room, and had a dog |
| summer | Not a good choice for the number of people |
| summer | No reason |
| summer | Needed extra space |
| summer | My son rents a house every year and other family members share so we can be together |
| summer | My sister paid for the house |

| Season | Q14a - Why did you choose to stay in a rental home instead of a hotel? |
|---------------|--|
| summer | My family has been vacationing at Ockracoke for over thirty years and we all stay in the same home as family |
| summer | Much more private & more room |
| summer | More suitable for the family |
| summer | More space, can cook, like being in a home rather than a hotel room |
| summer | More space, amenities, our location was on a canal, docking for kayaks and boats. |
| summer | More space for the size of our group |
| summer | More space and less money |
| summer | More room, kitchen, more baths, larger living area, better view, |
| summer | More room for everyone...not too many hotels/motels there anyway. |
| summer | More room and our dog was able to go. |
| summer | More room |
| summer | More room |
| summer | More private, more space. |
| summer | More privacy, large kitchen, private pool |
| summer | More people can stay in the same place |
| summer | More like home |
| summer | More comfortable and convenient for a large group including children. We like to cook our own meals and enjoy the privacy of our own pool. |
| summer | More comfortable |
| summer | Money |
| summer | Love being near the beach and having all the amenities a home has, love the privacy, it's cheaper than a hotel, we can bring our dog |
| summer | Location, varieties of amenities, and the number in group |
| summer | Like the roominess and having the ability to cook meals. |
| summer | Like the privacy and extra bedrooms. |
| summer | Like having a kitchen and space |
| summer | Less noisy, more space to live in |
| summer | Less expensive, all can stay together and can cook |
| summer | Less expensive when cost is divided among family |
| summer | Less expensive and better |
| summer | Less expensive |
| summer | Larger, privacy, kitchen facilities and other amenities |
| summer | Larger more room |
| summer | Large group, like the space (especially with 8 kids), we don't like to eat out. |
| summer | Large family |
| summer | Kitchen facilities. Private pool. Large number of people in our group. |
| summer | It was more economical and I liked the accommodations |
| summer | It was better suited for our size group. |
| summer | It is nice to have the privacy of a rental home along with plenty of space so every one can have their own room. |
| summer | It is more personal and we can make our own meals easily. |

Season Q14a - Why did you choose to stay in a rental home instead of a hotel?

- summer It is less expensive for a large group to stay and we can fix our own meals and be more stretched out in the home. Although we only had 14 in our home, the second week we were there the other houses were filled with friends. We were able to have church
- summer It is cheaper.
- summer In a rental home, a family can adapt to the home and in a sense make it their own. By the end of the week there, we missed not only leaving vacation but leaving the house. The rental also allows for much more privacy than a hotel would. The trip def
- summer I want to stay on the beach with just my family.
- summer I own the house
- summer I like to room to be able to spread out and eat breakfast and lunch
- summer I like the room and the amenities
- summer I like having a house
- summer I have stayed in a rental home because that is where I have been staying since we started going to the outer banks in 1986.
- summer Good reasonable price and location
- summer Fun!
- summer Friends we were with have stayed in rental home 30 years.
- summer Friends invited us for a few days and it was free
- summer Friends
- summer Friend
- summer Freedom of partying with a lot of people
- summer Free
- summer For the large crowd to accommodate 20 people
- summer Flexibility with family and weather events
- summer Family needs and size
- summer Family gathering
- summer Family decided to do this and there were 20 of us to share the cost.
- summer Family can be together
- summer Equipped for everything a family with children would need to be comfortable
- summer Don't like hotel
- summer Desired extra privacy, space, house is located on a canal in Frisco, value for rental dollars paid as opposed to hotel accommodations, able to prepare meals, no need to deal with housekeeping personnel...and we will continue to do this every year.
- summer Cost, family reunion wanted to be together
- summer Cost and space
- summer Cost and available
- summer Cook and it was convenient
- summer Convenience for a family--privacy and able to make meals on site
- summer Convenience and to share with another family.
- summer Comfort, privacy, kitchen facilities, space for a family of 6.

| Season | Q14a - Why did you choose to stay in a rental home instead of a hotel? |
|---------------|--|
| summer | Comfort, privacy |
| summer | Comfort and price |
| summer | Comfort |
| summer | Cheaper in the long run |
| summer | Cheaper |
| summer | Cheaper |
| summer | Cheaper |
| summer | Boat dock |
| summer | Bigger family to be together. Much more comfortable |
| summer | Big for all |
| summer | Big family, sometimes take the dog and have lots of room. Rental home is more relaxing |
| summer | Better rate, larger and with kitchen, washer/drier etc. |
| summer | Better location for a family - access to beach, cooking, laundry facilities, more space etc |
| summer | Better for our family - relaxation, meals, all our fishing equipment, outdoor hot tub, and grill fish cleaning station. |
| summer | Better family accommodations, better ability to offer diverse activities for the whole family, ability to control costs by having home cooked meals. |
| summer | Better accommodations for entire family, especially with young children. |
| summer | Best accommodated our family needs. |
| summer | Because we have so many family members.22 |
| summer | Because we had young children, so coming and going and naps were easier in a rental home |
| summer | Because we had five couples who share the cost of the house and the cost of groceries so it makes a very economical vacation off season. |
| summer | Because we could all together |
| summer | Because of the size |
| summer | Because of the number of people. |
| summer | Because of the number of people staying |
| summer | Because of privacy |
| summer | Because my in-laws rented it and it was the last house left standing on the beach before the last hurricane. Very cool and yet the house made lots of noise with the changing tides. |
| summer | Because it was cheaper |
| summer | Because it was a large family |
| summer | Because it is a house. |
| summer | Because it's tradition.....we get as much of the extended family together and we rent a house with a private pool, etc. We are also blessed with some really good cooks...so we like to eat in, make the most of local seafood. Area restaurants seem overpriced |
| summer | Because it's all we've done; we take our dogs |

| Season | Q14a - Why did you choose to stay in a rental home instead of a hotel? |
|---------------|--|
| summer | Because it's so much nicer so much bigger and offers more. We can prepare our own meals. |
| summer | Because 11 of us/ wanted to be together |
| summer | Beach access |
| summer | Arrangements were made by my sister |
| summer | Amount of people who accompanied me |
| summer | Amount of people |
| summer | A lot more room, access to kitchen with fridge, stove, dishwasher, etc. More enjoyable to be able to be next to the water, view sunsets, etc. |
| summer | Accommodate more people and with kids increase options for activities and convenience of eating in, allow us to spend more time together |
| summer | Accommodate 14 people |
| summer | Accommodations were exactly what was necessary for a party of 11 to be together and yet have private time under the same roof. Small children having a primary residence to play and feel as if they were at home. The space - being able to move around without |
| summer | A pet. We brought a dog. |
| summer | A friends rental home/ we have a dog |
| summer | 13 people cheaper |
| summer | # Of people |
| fall | With a family we enjoy having more room, a washer/dryer, full kitchen, sitting on the porch, the quiet neighborhood, walks on the beach at night, and cooking in. |
| fall | What we have always done and want our family to be altogether |
| fall | We wanted the same things we enjoy at home - full kitchen, multiple baths, etc. |
| fall | We use this trip as a mini family reunion. We rent a house so we can be with our relatives from Midwest and enjoy time being together. |
| fall | We travel with a dog and we enjoy having a kitchen and the amenities that a house provides. |
| fall | We shared the house with friends who had stayed there before. |
| fall | We like staying in a house with a kitchen, pool, decks, hot tubs and all the amenities that go along with it. |
| fall | We like staying at a rental home because we don't have to eat all our meals out and we went with another family so we could all be together in the evening to play games etc. |
| fall | We like privacy and atmosphere. |
| fall | We joined other family members and all stayed together. There were 5 families. |
| fall | We have been renting homes on the OBX for 20 years. Much more convenient for us than a hotel. |
| fall | We have an extended family staying together and like to do our own cooking. The beaches are not so crowded in a home development. |
| fall | We have a person who is handicap, and the house was for the handicap. |

| Season | Q14a - Why did you choose to stay in a rental home instead of a hotel? |
|--------|---|
| fall | We enjoy the size of the homes, nice for large parties, and proximity to beach. There is only one hotel in the corolla area. |
| fall | We don't like staying where numerous other people have stayed. We also like the quieter atmosphere of a home and the privacy. |
| fall | Wanted the privacy and freedom. My son is on a special diet and easier to cook for ourselves sometimes. |
| fall | Variety of bedrooms and space to accommodate a number of close friendly couples. Plus location. |
| fall | Use of full kitchen, laundry, separate bedrooms, ability to sit outside while small children nap, ability to bring own food and drink, privacy. |
| fall | There were a couple families and the cost was cheaper |
| fall | There are many nice places to rent...like a home away from home. Able to cook. |
| fall | The family environment |
| fall | The cost is more economical, the accommodations more spacious and private. |
| fall | The amount of people that went with us. |
| fall | That's what we have always done |
| fall | Suitable for large family |
| fall | Staying on the beach with all the comforts of home. All of us can stay under one roof. |
| fall | Started using this one house and we are very satisfied. Rented from friend. |
| fall | Space/the beach |
| fall | Space |
| fall | Someone else made the reservations, I was just a guest |
| fall | So many people in her group |
| fall | So many people |
| fall | So many people |
| fall | So could eat in if we wanted to, do our laundry, and be on our own |
| fall | Size of party more conducive to family interaction and comfort |
| fall | Size of family |
| fall | Sister in law was responsible for finding accommodations |
| fall | Private hot tub, pool and balconies. The kitchen never closes and the pools always open. |
| fall | Private |
| fall | Privacy and low cost of housing during the off season. It is the only time we visit the outer banks. |
| fall | Privacy |
| fall | Privacy |
| fall | Privacy |
| fall | Privacy |
| fall | Price was good. More room |
| fall | Price |

| Season | Q14a - Why did you choose to stay in a rental home instead of a hotel? |
|--------|--|
| fall | Previous experience we've done it before...quiet and less commercial |
| fall | Pets!!! |
| fall | Period of time there |
| fall | Peace & quiet |
| fall | Number of people, pool, kitchen |
| fall | Number of people |
| fall | No reason |
| fall | Nicer, cheaper |
| fall | Never stayed at a hotel here |
| fall | Needed the space! Will never stay in a hotel again if I do not have to! |
| fall | My wife's sister and brother-in-law have a beach home at Duck. |
| fall | My friends I was with go every year and they rent a house |
| fall | My friend had stayed there before. |
| fall | My family rented it, they chose the accommodations |
| fall | My family had stayed there before that is why we did it. It is cheaper. |
| fall | Much nicer |
| fall | More space, privacy and flexibility to prepare some food. The price was about the same as a hotel. |
| fall | More space, kitchen facilities, better for large parties |
| fall | More space, full kitchen |
| fall | More space and we cook our on meals |
| fall | More room. Had flexibility for 2 dogs. |
| fall | More room for the whole family to stay together. More privacy. |
| fall | More room and able to cook. |
| fall | More room more privacy. |
| fall | More privacy and freedom. |
| fall | More personal |
| fall | More of a convenience and better value |
| fall | More homey. More private |
| fall | More homes were available to rent instead of hotels |
| fall | More flexibility much nicer. |
| fall | More flexibility in eating and sleeping with a large family group. |
| fall | More cost effective |
| fall | More convenient |
| fall | More comfortable |
| fall | More accommodations |
| fall | Mainly because with four families, we found in cheaper and more convenient to share a house. We could prepare are own meals. |
| fall | Love the togetherness of staying with friends in a home. |
| fall | Location cost |
| fall | Location and accommodated a larger group |
| fall | Location |
| fall | Like to stay in a big lovely house w/pool, for the privacy, freedom, and ability to make our own meals. |

| Season | Q14a - Why did you choose to stay in a rental home instead of a hotel? |
|--------|--|
| fall | Like the room |
| fall | Like it better with family |
| fall | Like having a lot of space....like being able to eat at home. |
| fall | Less expensive with our group of people. |
| fall | Less expensive--full kitchen for eat in meals--quiet location--room for friends |
| fall | Knew someone who owned a home |
| fall | Kitchen facilities and beach access |
| fall | Just preferred it |
| fall | It was where we wanted to stay |
| fall | It was put up in auction/ by owner |
| fall | It was more reasonably priced for 4 couples getting together, and we prefer the privacy of a house. |
| fall | It is more cost effective to bring your own groceries and cook most of your own meals when you have a young family than to eat out all the time |
| fall | It's the best way to spend a whole week. |
| fall | It's a friend of ours who owns this house |
| fall | In my opinion there were only 3-4 hotels that were of a quality I expect when I travel, and it was difficult to find an ocean-front room (high enough to see over the dune) in one of these few hotels. Since many of the rental houses are also used by their |
| fall | I want to be right on the beach. |
| fall | I think the privacy the accommodations were incredible. Would like to live there. We only 2 nights because of weather. |
| fall | I preferred the flexibility of cooking for myself and friends to having to go out for meals. |
| fall | I like the remoteness of the area we were in I have stayed in duck and it has become too crowded |
| fall | I like it better |
| fall | I have been doing this for years the rental companies are nice. It has a kitchen, washer and dryer more comfortable. |
| fall | I've always stayed in the rental homes and find them more spacious and a better value |
| fall | House was beautiful |
| fall | Have more room. Don't have to deal with everyone around you and hear the noise. |
| fall | Hate hotel |
| fall | Great price for the size! |
| fall | Full kitchen and number of bedrooms |
| fall | Freedom to do as we see fit. |
| fall | For the private amenities |
| fall | For privacy purposes |
| fall | For a period less than a week, we normally stay in a motel |

| Season | Q14a - Why did you choose to stay in a rental home instead of a hotel? |
|--------|---|
| fall | For a large family (5) a rental home is the most economical way for us to stay, especially if we are planning on a week or more...plus the ability to cook saves us a lot |
| fall | Felt more comfortable. |
| fall | Feels more like home. Accommodations allow you to eat meals in. Close to the beaches and beach areas near cottages are less crowded. |
| fall | Family wedding |
| fall | Family togetherness |
| fall | Family owned home |
| fall | Family atmosphere |
| fall | Family & friends, lower per capita cost, and homelike atmosphere... |
| fall | Family |
| fall | Enough bedrooms for all the family |
| fall | Enjoy the privacy of a home, more room too |
| fall | Enjoy the comforts of home |
| fall | Don't like hotels. |
| fall | Dog friendly, private, roomy, affordable |
| fall | Dog |
| fall | Cost, size |
| fall | Cost effective for large group |
| fall | Cost and ability to cook our own meals; privacy. Family atmosphere |
| fall | Convenience, price, privacy, beach access, more than one bathroom |
| fall | Convenience and on the sound for kayaking |
| fall | Comfort and price. |
| fall | Cheaper and has more space |
| fall | Cheaper |
| fall | Buxton only has the one hotel & we prefer the amenities a home has to offer such as privacy, kitchen, hot tub, etc. |
| fall | Bigger rooms, kitchen facilities, everyone (6 in our party) got to stay together |
| fall | Because we were four separate families; in a house, we could all stay together, yet have our privacy, and was less expensive than renting four separate hotel rooms. |
| fall | Because we go off season and it's quiet especially nice for older people |
| fall | Because we brought along our family dog, we wanted the flexibility that a house affords with respect to the cooking, laundry and beach within walking distance. |
| fall | Because trip was short. |
| fall | Because of the size of our party. |
| fall | Because of the number of people and the better accommodations than living out of a hotel room. |
| fall | Because it's 302492 times nicer. And plus its right on the beach. And prettier too. |
| fall | Because it would accommodate our large party of 10 |
| fall | Because it is so much more comfortable than and not as confining as a hotel. |

| Season | Q14a - Why did you choose to stay in a rental home instead of a hotel? |
|---------------|---|
| fall | Because it is like having a home away from home... And we can share with family for a very reasonable price! |
| fall | Because hotels are small. |
| fall | Availability |
| fall | Annual family reunion |
| fall | Always stayed in houses |
| fall | Always stayed in house for the room |
| fall | Always do |
| fall | All the convenience of home |
| fall | Accommodations for a large extended family best served by rental house with kitchen and common dining and family rooms. |
| fall | Accommodated the whole family |
| fall | Accommodated a lot of people |
| fall | Able to bring along pets |
| fall | Ability to prepare meals, and place to relax |
| fall | A co-worker has a place there and was reasonable for our 25th anniversary. |
| fall | 3 families traveling together |
| fall | 10 people (family) wanted to stay together in one place |

| Season | Q18a - Why do you feel that Outer Banks fell short of your expectations? |
|--------|---|
| summer | Your grocery store is a big ripoff. Quality is very poor. Prices are at rip-off. |
| summer | We were hit by the weather. Our installations at the NPS were flooded. If the weather had been better, we would have enjoyed the trip a lot more. |
| summer | We got a reckless endangerment court ordered appearance for going a little to fast on the way home. Speed traps are set up in North Carolina. I feel that the county has purposefully changed speed limits and law enforcement waits for PA residents. |
| summer | Traffic is still high. Food selections are disappointing. The entire community is over priced and quality of services/products are lacking. |
| summer | The Outer Banks has gotten too built up with too many expensive houses blocking the view of the ocean. Also too many junky looking strip shopping centers. |
| summer | The point was closed to vehicles due to a bird nesting. The water in Avon was cold and we wanted to go where the south wind would push warmer water to the beach for swimming and we could not go there due to closing. |
| summer | Since it was only a day trip, we did not see everything, so this opinion is slighted - I expected more of a tourist town. |
| summer | Poor motel accommodations, lack of restaurants to meet demands of huge numbers of visitors. |
| summer | Our memories from about 10-20 years ago, when we came yearly were of a calm and somewhat remote area. Now the traffic and the development cause a lot of delays getting around and everywhere seems crowded. |
| summer | Not looking forward to returning based on our first trip there |
| summer | Not as beautiful as advertised because of the dunes that block the view. |
| summer | It was more commercialized than we expected. |
| summer | It's too overdeveloped now. |
| summer | I like more people and activities & too far to go to shop |
| summer | I fully expected to have more and better access to drive on the beach to 1.) Enjoy the beach with my family at a location I wanted to go to, but couldn't; and 2.) Fish in areas where I used to be able to fish. |
| summer | I didn't make reservations when I got there - we had to drive around for a place. |
| summer | Did not expect it to be so developed. |
| summer | Did not catch any fish, no all you can eat seafood restaurant on Hatteras Island or Buxton areas, my experience at the wings locations specifically the one at Hatteras Island. |
| fall | Too much change (progress?) From the earlier Outer Banks as I knew & loved them. The Sea Spray was by far the best accommodations on the Outer Banks, Myrtle Beach, Daytona & other places up & down the Atlantic coast. Its closing is a great loss to the area. |
| fall | Time of the year, hurricane |

| Season | Q18a - Why do you feel that Outer Banks fell short of your expectations? |
|--------|--|
| fall | The choice in campgrounds was very poor. We stayed at Rodenthe's campground Camp Hatteras. It was a wonderful place to stay but we wanted to stay farther north to be more centrally located. There was only one near Kitty Hawk but it did not look very nice. |
| fall | Storm |
| fall | Problems with overcrowding, commercial |
| fall | Overdevelopment |
| fall | Location too far from everything, living in Florida and visiting Alabama it did not compare. Built up too much in the area. House after house. |
| fall | It is so overdeveloped with humungous ugly houses that you cannot see the beach. Thank goodness for the national park sea shore or we would have no clue about what the Outer Banks look like. You have ruined the area with all those houses which will wash away |
| fall | I expected to see more of the beach than we did. We couldn't because of the buildings. |
| fall | Expected more to do |
| fall | Expected more accommodations for a family reunion |
| fall | Excess development |
| fall | Could not see much of ocean because of houses, houses, and more houses |
| fall | Because it was a bad year because of hurricanes |
| fall | Accommodations were not satisfying, weather, out of season |

| Season | Q19a - why will you probably/definitely not visit the Outer Banks of North Carolina in the next year for a vacation or leisure trip? |
|---------------|---|
| summer | We will probably visit somewhere else next summer. |
| summer | We were looking for a retirement home and everything was way out of our budget. |
| summer | We want to see something else |
| summer | We usually vary our vacations year to year, rotating on about a 5-year schedule. We'll probably go back in 2009 unless we get some friends interested in a fall fishing trip. |
| summer | We try to vary our vacations |
| summer | We travel somewhere new every year |
| summer | We like to visit lots of different places on our vacations. |
| summer | We like to travel somewhere different each vacation |
| summer | We like to explore new areas. |
| summer | We have other things planned |
| summer | We go every other year as a reunion trip. |
| summer | We aren't generally able to get so many people together at one time and we like to see a wide range of places. Will probably return in a couple years. |
| summer | We are booked up around the world for the next four years. |
| summer | We've seen the sights there and want to explore new areas. |
| summer | Want to go other places |
| summer | Visiting other places |
| summer | Too far to go every year |
| summer | Too far away from home! |
| summer | Too crowded, too much traffic and poor non-chain motel accommodations |
| summer | There are so many other places to see |
| summer | There are other places that we have not seen and we want to go there first. We are planning to go to Savannah and Charleston. |
| summer | There are many other places to visit. |
| summer | The hotel accommodations are not great. The options range from terrible and not cheap to extremely expensive (bed and breakfast type places). There is not a nice variety of restaurants and the food, if available, is expensive for the quality. |
| summer | The factory I work for went bankrupt and no vacation plans |
| summer | The distance and there are other places we would like to visit. |
| summer | The condition of the houses we have rented over the 4 years has gotten consistently worse each year. |
| summer | Speed traps. Law enforcement purposefully seeking out-of-towners to charge with speeding. Racket going on down there to find as many out-of-towners speeding and giving them mandated court appearances so everyone has no choice but to pay lawyers and to |
| summer | See previous response. |

| Season | Q19a - why will you probably/definitely not visit the Outer Banks of North Carolina in the next year for a vacation or leisure trip? |
|--------|---|
| summer | Same as previous question. I'm afraid that the Outer Banks tourism folks haven't taken the beach closures very seriously. The appearance of that tells me that it's not that important to you...that it is of no concern. Access to the beach, as I have enjoyed |
| summer | Planned for 3 years from now in 2008 |
| summer | Other plans to travel the world |
| summer | Other places to go |
| summer | Other places to go |
| summer | Not within the next year, but possibly within the next 5 years |
| summer | Not every year |
| summer | New addition to family |
| summer | Live far away and only go every 2 years |
| summer | Like going different places |
| summer | Just wanted to see 1 time |
| summer | Just there. Many places in the US and the world to visit. |
| summer | I usually go road 81 when I go north, 95 is too crowded. |
| summer | I travel different places, I would choose places we haven't been before |
| summer | I like to go to different places each year |
| summer | I go to a conference there every three years. I will probably not go back until then. |
| summer | I go different places |
| summer | It's too far to drive, more going on Jersey coast |
| summer | I'm from California and there are so many interesting places to see that I haven't been yet. I enjoyed my trip to Kill Devil Hills and the Wright Brothers monument and the Atlantic ocean, however I want to see as much of this wonderful diverse country as I can. |
| summer | I go every other year |
| summer | Have other places that we want to visit |
| summer | Have another trip planned |
| summer | Going to look for a less developed area. |
| summer | Going overseas |
| summer | Going North to Alaska!!!!!!!!!!!!!! |
| summer | Go somewhere different |
| summer | Go other places |
| summer | Go every other year |
| summer | Getting too crowded in the northern beaches |
| summer | Felt like the commercial, private, and state advertisements were misleading. |
| summer | Do not go to the same place each year |
| summer | Do not go the same place each year |
| summer | Daughter moved from North Carolina |
| summer | Cost to do it again so soon but will another time |
| summer | Building |
| summer | Been there. Done that. |

| Season | Q19a - why will you probably/definitely not visit the Outer Banks of North Carolina in the next year for a vacation or leisure trip? |
|--------|---|
| summer | Because, we've been there and high fuel prices |
| summer | Because we will be going to Texas on our next vacation and also a short trip to Mexico. |
| summer | Because we can only afford to go every 5 years or so. And with a daughter in San Diego, we would probably go there. |
| summer | Because we already planned another destination: TX! |
| summer | 14-hour drive |
| fall | Your RV facilities are not plentiful and we are RV travelers |
| fall | Will visit other places |
| fall | We will not get back for a couple years. |
| fall | We will choose another destination in order to see more places that we haven't previously visited. |
| fall | We were traveling from north to south; we didn't really go there for vacation just traveling through |
| fall | We visited friends there who we will see during the year. We are planning a big family trip to Europe next year instead. We may return to the Outer Banks the year after. |
| fall | We vary our vacations---next year, it'll probably be Delaware or Missouri or...you get the idea. |
| fall | We try to go different places each year and, other than Yosemite National Park, rarely go to the same place twice! However, the Outer Banks was very nice and we may go back at some time - it would be a choice between the Outer Banks and North Myrtle Beach |
| fall | We live 20 hours away - next year we are going on an Alaskan cruise. |
| fall | We have our travel plans set 2006. |
| fall | We have made other plans for the next year. |
| fall | We go to the Outer Banks every few years. We do love it there - very beautiful |
| fall | We found the accommodations for RV's (motor homes) very expensive \$55/night, on the extremely high end of RV parks. We also visited in October and the weather was extremely bad and we could not use the ferries, which was part of our trip. |
| fall | We are using our timeshare exchange options to explore places we haven't been before, so will not come in 2006. However, would be delighted to visit in the future, perhaps 2007, as I traveled with my mother in 2005 and would also like to introduce my husband to the area. |
| fall | We've been there! |
| fall | We'd like to go to new places instead of revisiting a place we've been before. I probably wouldn't have gone to the Outer Banks on my own at this point in my life, but my sister got married there! It was an enjoyable place, however. |
| fall | Want to go somewhere different |
| fall | Want to go somewhere different |
| fall | Want to go every other year |

| Season | Q19a - why will you probably/definitely not visit the Outer Banks of North Carolina in the next year for a vacation or leisure trip? |
|--------|--|
| fall | Vacation time is set |
| fall | Usually alternate between Florida - North Carolina each year. 2006 is Florida year. |
| fall | Using timeshare we own that will save us some money and increases in pricing of units. |
| fall | Travel somewhere else |
| fall | Traffic |
| fall | Too soon to return. Other places to explore |
| fall | Too far away. |
| fall | Too far away to go every year. |
| fall | Too far away for a second visit so soon after our first. |
| fall | There are too many other areas to visit in our great country with our limited time. |
| fall | There are many other places I wish to visit. I live on the west coast so it is not convenient to visit again. |
| fall | So many to go |
| fall | So many places to visit |
| fall | Prefer to travel to new destinations each year |
| fall | Plan to visit another location |
| fall | Planning a vacation at wrong time of year, want to try something different |
| fall | Partly because of age & health. If these were more favorable answers probably would be might or might not visit. There is not much you can do to ruin the ocean & the sunsets & sunrises; and the lighthouses are being preserved and the park has saved the |
| fall | Other travel plans, next year |
| fall | Other travel plans |
| fall | Other travel plans |
| fall | Other plans |
| fall | Other plan for next year |
| fall | Other places we want to go. |
| fall | Other places to see |
| fall | Other places to go |
| fall | Not likely to be traveling in that area. |
| fall | Not next year |
| fall | Not next year |
| fall | Not next year |
| fall | No desire to visit again |
| fall | Next time we would prefer to spend time inland North Carolina. This trip was to see the ocean. |
| fall | Mountain property in North Carolina |
| fall | Money - have to save for something like that |
| fall | Maybe in the next 5 years |

| Season | Q19a - why will you probably/definitely not visit the Outer Banks of North Carolina in the next year for a vacation or leisure trip? |
|--------|--|
| fall | Lots of other places to go - don't return to the same place twice. May come back again someday - it was nice. |
| fall | It is time to look for another destination. My wife and I have come every year for the last 12 years or so and we are beginning to see too many large properties. Empty nesters are being squeezed out to make room for others. It's not personal, it's just the |
| fall | It is a 5 to 7-hour drive. We need to be closer to home since some family members cannot stay the whole week. Too far to drive for a weekend. Besides that, we would go back again next year. |
| fall | I would like to vary where I go, I was on a business trip to Raleigh so I extended my trip to the Outer Banks. |
| fall | I was in NC for work and took a couple days extra to see the state. |
| fall | I think we will not be taking any trip next year, but if we did, it would likely be the Outer Banks |
| fall | I saw all the historic sites and lighthouses. No other attractions interested me. |
| fall | I live abroad and am not likely to be in the USA next year. However, I would return if I was in North Carolina or nearby. |
| fall | I live a long way away |
| fall | I have been to other places that we enjoyed more |
| fall | I go different places - it's not that I didn't like the Outer Banks. |
| fall | I am going elsewhere |
| fall | I'm trying to see all of the coastal USA. At some point, I may come back to the Outer Banks, but at this point there's so much I haven't seen yet. |
| fall | Have other travel plans |
| fall | Have other places like to go |
| fall | Going to Virginia |
| fall | Going to Topsail Beach |
| fall | Going to other locations in 06, most likely. Also, long long car ride from the metro DC area. You need to get that ferry running, |
| fall | Going to different locations |
| fall | Going to different destination |
| fall | Going southwest |
| fall | Going somewhere different |
| fall | Going on a cruise |
| fall | Gas prices, cost of rental homes and distance from our home |
| fall | Family structure has changed. |
| fall | Every other year |
| fall | Due to the fact we live in New Mexico and were on a six-month trip visiting sights. We loved the Outer Banks! |
| fall | Don't take many vacations |
| fall | Do something different |
| fall | Different location next year |

| Season | Q19a - why will you probably/definitely not visit the Outer Banks of North Carolina in the next year for a vacation or leisure trip? |
|---------------|---|
| fall | Different place next year |
| fall | Cost, taxes on rentals, fishing license |
| fall | Been there. |
| fall | Been there, done that. Maybe some time again later. |
| fall | Because I am on an extended trip - it will be harder to get back east |
| fall | As I said in the answer to previous question about why my expectations were not met. Too overdeveloped with humungous ugly houses. |
| fall | Age. |