Strategic
Marketing &
Research, Inc.

Outer Banks Visitors Bureau

Visitor Research

Wave 3 – Winter 2006

May 2006

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BACKGROUND & OBJECTIVES

The Outer Banks has seen significant growth over the years, and while it has lead to increased visitation to the area, it could also lead to loss of character. In being proactive, the Outer Banks Visitor's Bureau is exploring who their visitors are and what types of trips they are experiencing in order to know how to turn visitors into repeat customers.

This year-long 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 third wave of research and includes information relative to summer, fall and winter 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 Waves 1, 2 and 3 of this research, which includes data for summer, fall and winter 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 Expressway
- Aycock Brown Welcome Center
- Wright Brothers Memorial
- Ferry
- Cape Hatteras Lighthouse
- Whalebone Welcome Center
- Fort Raleigh
- Manteo Welcome Center

In total 4,312 people completed the basic survey – 2,298 by summer visitors, 1,967 by fall visitors and 209 from winter visitors. From these, SMARI completed 1,011 surveys - 465 with summer visitors, 458 with fall visitors and 88 with winter visitors. Though SMARI had a far higher survey completion rate with winter visitors – 20% complete in summer, 23% complete in winter and 43% in winter -- the original sample was far smaller. This distinction in sample size is important because the smaller the sample size, the more difficult to get accurate measurements of some breakdowns. Therefore in some cases the level of detail for winter visitors is not available. But for the overall study, the results have an accuracy of +/-3.1%.

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

By comparing the three seasons, it is interesting that the ratings for Outer Banks' attributes do not vary significantly, if at all. The greatest variation is the rating of beaches. Though fewer visitors utilized beaches during their winter trip, it was still a popular trip activity (92% of winter visitors went to the beach). However, it would have been a very different experience in the winter, likely not as enjoyable as in the summer.

Attribute Ratings
On 4-point Scale

Attributes	Summer	Fall	Winter
Beautiful beaches	3.9	3.7	3.5
A clean & safe environment	3.7	3.7	3.5
Scenic areas or scenic drives	3.6	3.7	3.6
Interesting historic sites / landmarks	3.6	3.7	3.6
Good accommodations	3.6	3.5	3.4
Fishing opportunities	3.4	3.0	3.1
Good restaurants	3.4	3.4	3.3
Family attractions	3.4	3.2	3.0
Wildlife viewing & bird-watching	3.3	3.1	3.1
Good shopping opportunities	3.2	3.1	3.0
Sporting activities	3.1	2.7	2.5
Arts or cultural activities	2.6	2.6	2.6
Performing & visual arts	2.4	2.3	2.2
Good golf courses	2.2	2.2	2.1

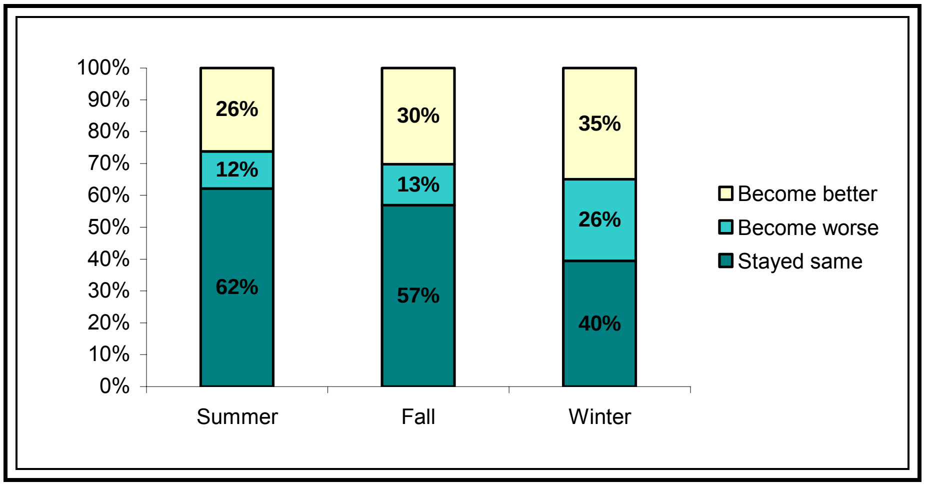
To assess the relative importance of these factors in motivating travel, the respondents were asked to identify those factors which were most important to their choosing to visit the Outer Banks. This exercise helps to identify the attributes which "motivate" the trip and what characteristics differentiate the Outer Banks from other vacation options. While among both summer and fall visitors, the area's beautiful beaches were the primary influencer, scenic drives was the primary motivator in the winter. And though some activities are less motivating for winter visitors than they were for summer visitors, they remain important activities. This is especially true of visiting the Outer Banks for beautiful beaches and historic sites.

Motivations for Visiting the Outer Banks

Visited for…	Summer	Fall	Winter	Difference
Scenic areas or scenic drives	9.0%	13.3%	24.7%	15.7%
Good accommodations	7.6%	11.0%	22.1%	14.5%
A clean & safe environment	9.4%	9.1%	15.6%	6.2%
Sporting activities	1.3%	0.5%	1.3%	0.0%
Good golf courses	0.0%	0.2%	0.0%	0.0%
Visual or performing arts	0.0%	0.0%	0.0%	0.0%
Arts or cultural activities	0.2%	0.0%	0.0%	-0.2%
Good shopping opportunities	0.4%	0.5%	0.0%	-0.4%
Interesting historic sties/landmarks	8.3%	19.3%	7.8%	-0.5%
Good restaurants	2.0%	2.8%	1.3%	-0.7%
Fishing opportunities	5.2%	5.1%	3.9%	-1.3%
Wildlife viewing & bird watching	1.3%	1.4%	0.0%	-1.3%
Family attractions	4.7%	2.8%	1.3%	-3.4%
Beautiful beaches	50.4%	34.0%	22.1%	-28.3%

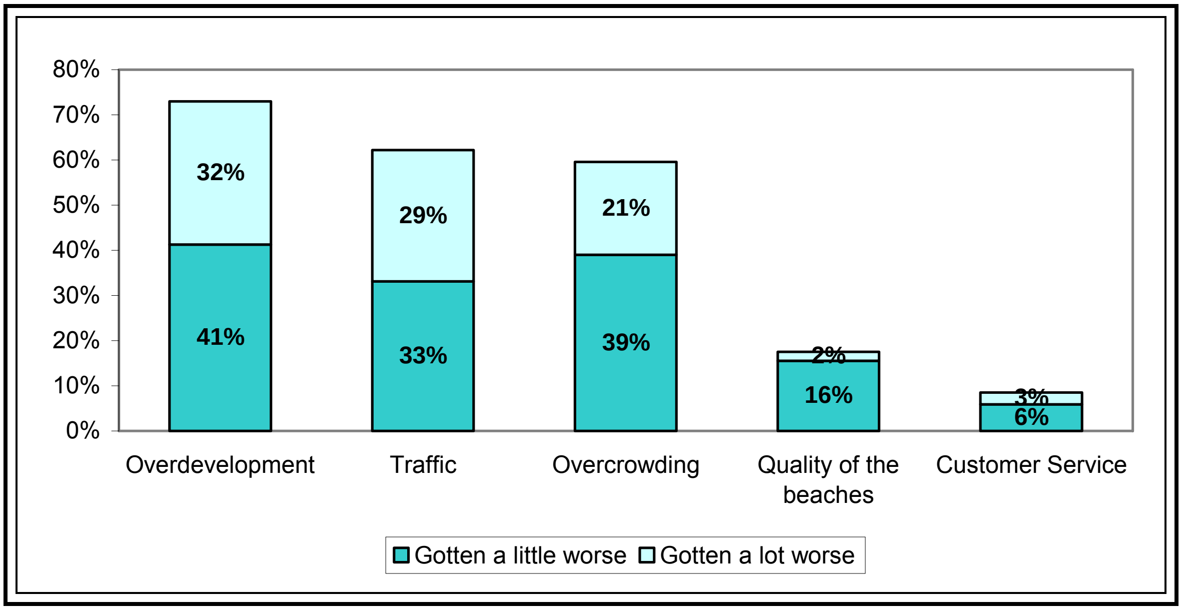
With becoming one of the premier destinations in the country, the Outer Banks has seen a tradeoff between unique charm and development. While summer and fall visitors were in relative agreement that the area was staying the same or improving, winter visitors had very different reactions. Though a greater percentage believed the Outer Banks had gotten better, a higher percentage also believed the area had become worse. And while only 26% feel the destination is getting worse, this is worth monitoring.

Outer Banks has…



While winter visitors were split in their belief that the area had both improved and deteriorated, it did not effect overall perceptions of the area. There continues to be a sense among all 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. In fact, though winter visitors were less likely to visit the beaches and as we saw, were inclined to rate them lower than summer and fall travelers, there was actually a decrease (from 21% to 18%) in the number who believed the beaches were deteriorating.

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 winter visitors to summer and fall visitors.

Where are visitors coming from and which markets are generating the highest levels of visitation to the Outer Banks? While the profile for summer and fall was relatively the same, there are some distinct differences among winter visitors. First, there is more variety from where visitors are traveling. While 72% of summer visitors were from 22 markets, only 64 % of winter visitors were from those areas. In addition, while the Norforlk, VA market was high performing in summer and fall, it increased dramatically in winter. And though visitation from Washington, DC fell off, it is important to note that it is still the second-highest performing market in winter.

Origin of Visitors

City of Origin	Summer	Fall	Winter	Difference
Norfolk-Portsmouth-Newport News, VA	**6.5%**	**7.2%**	**14.4%**	**7.9%**
Greensboro-High Point-Winston Salem, NC	**1.7%**	**1.4%**	**3.8%**	**2.1%**
Minneapolis-St. Paul, MN	0.3%	0.4%	1.4%	1.1%
Florence-Myrtle Beach, SC	0.5%	0.2%	1.4%	0.9%
Indianapolis, IN	1.0%	0.4%	1.4%	0.4%
Boston (Manchester), MA-NH	1.1%	1.0%	1.4%	0.3%
Columbus, OH	1.1%	1.0%	1.0%	-0.1%
Charlotte, NC	3.1%	1.9%	2.9%	-0.2%
New York, NY	4.8%	5.2%	4.3%	-0.5%
Roanoke-Lynchburg, VA	2.0%	1.8%	1.4%	-0.6%
Cincinnati, OH	1.1%	1.0%	0.5%	-0.6%
Raleigh-Durham (Fayetteville), NC	4.5%	3.3%	3.8%	-0.7%
Greenville-New Bern-Washington, NC	2.6%	1.4%	1.9%	-0.7%
Hartford & New Haven, CT	1.2%	1.0%	0.5%	-0.7%
Wilkes Barre-Scranton, PA	1.3%	1.1%	0.5%	-0.8%
Baltimore, MD	5.1%	4.8%	3.8%	-1.3%
Harrisburg-Lancaster-Lebanon-York, PA	3.2%	2.3%	1.9%	-1.3%
Richmond-Petersburg, VA	5.6%	4.9%	3.8%	-1.8%
Cleveland, OH	2.0%	2.2%	0.0%	-2.0%
Pittsburgh, PA	4.9%	2.2%	2.4%	-2.5%
Philadelphia, PA	7.2%	8.4%	3.8%	-3.4%
Washington, DC (Hagerstown, MD)	11.2%	11.2%	7.7%	-3.5%
Total	**72.0%**	**64.3%**	**64.0%**	**-8.0%**

While the chart above deals with differences between summer and winter visitors, it does not take into account new markets that perform well for the Outer Banks during the winter months. In addition to those above, the table below shows high performing markets that were not represented in summer or fall.

Additional Markets Performing Well in Winter

City of Origin	Summer	Fall	Winter
Atlanta, GA	0.7%	1.1%	1.9%
Salisbury, MD	0.4%	0.9%	1.9%
Indianapolis, IN	1.0%	0.4%	1.4%
Florence-Myrtle Beach, SC	0.5%	0.2%	1.4%
Minneapolis-St. Paul, MN	0.3%	0.4%	1.4%
Total	**2.9%**	**3.0%**	**8.0%**

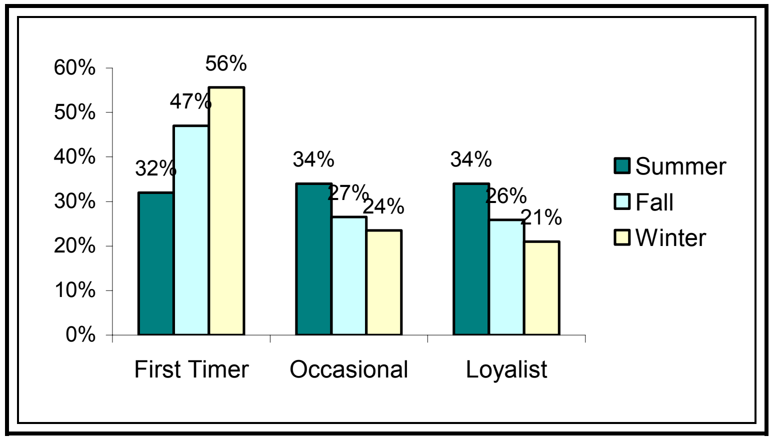
Demographically, winter visitors tended to be Caucasian, married and well educated. The average age of the winter visitors was slightly older than summer and fall visitors and while still affluent, have a lower income. However the biggest difference among winter visitors is that they were far less likely to travel with children.

Demographics	Summer	Fall	Winter
Age	47	53	54
Income	$82,331	$77,757	$72,833
Marital Status			
Single	13%	14%	13%
Not single	86%	86%	88%
% With Kids	51%	26%	20%

Last Grade of School Completed			
High school or less	10%	14%	11%
Some college/tech school	22%	29%	27%
College graduate	37%	33%	33%
Post graduate	31%	24%	28%
Ethnic Heritage			
Caucasian/White	93%	94%	96%
African American	1%	2%	2%
Hispanic/Latin American	1%	1%	0%
Asian or Pacific Islander	1%	1%	0%
Native American	1%	1%	0%
Other	3%	1%	1%

Relative to trends, the survey identified *First-time* visitors and then split previous visitors into *Occasional* visitors and *Loyalists*. Loyalists reported having visited the area for each of the past three years and prior to 2003. Occasional visitors visited in 2005 and at least one time prior. During the summer, the split was fairly even. However, it was noted in the previous Outer Banks visitor profile that a higher percentage of First-time visitors came in the fall and this presumed that this was because First-timers are more likely to explore the Outer Banks during the off-season. This trend continues with winter visitors. Far more visitors are visiting the Outer Banks for the first time in the off season. This has some marketing implications and means that the community has to work harder during these seasons to ensure a positive experience.

Past Visitation



The demographic profile of these first time visitors varies by season. Again, the winter visitor tends to be older and less affluent than their seasonal counterparts. However, want is most interesting is the first time winter visitor is even less likely to have kids and more likely to be better educated. Given these demographics and the changes in cities or origin, it is possible the winter visitors are "snowbirds" driving to Florida but deciding to stop in the Outer Banks for a short trip.

Demographics of First Time Visitors

Demographics	Summer	Fall	Winter
Age	46	52	56
Income	$80,410	$75,500	$73,986
Marital Status			
Single	14%	14%	9%
Not single	86%	86%	91%
% With Kids	54%	26%	13%
Last Grade of School Completed			
High school	11%	13%	13%
Some college/tech school	25%	26%	18%
College graduate	36%	35%	29%
Post graduate	29%	26%	40%

Ethnic Heritage			
Caucasian/White	90%	92%	98%
African American	1%	3%	2%
Hispanic/Latin American	3%	1%	0%
Asian or Pacific Islander	3%	1%	0%
Native American	0%	2%	0%
Other	3%	2%	0%

In looking at the PRIZM$_{NE}$ data, summer and fall classifications of visitors seemed to be very much in line with one another. However, winter visitors vary slightly – some new profiles are introduced in winter while others gained or lost percentages.

The PRIZM$_{NE}$ system 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).

What is most interesting for winter visitors, as noted in the demographic profile, is that far fewer are traveling to the Outer Banks with children. Also striking is the greater percentage visiting the Outer Banks from small towns and rural areas during winter.

The winter profile reinforces the idea that while visitors to the Outer Banks are often well educated and earn high incomes, they are not necessarily sophisticated. Winter visitors are even more traditional, laid back and heartland households than those coming to the area in the summer or fall.

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

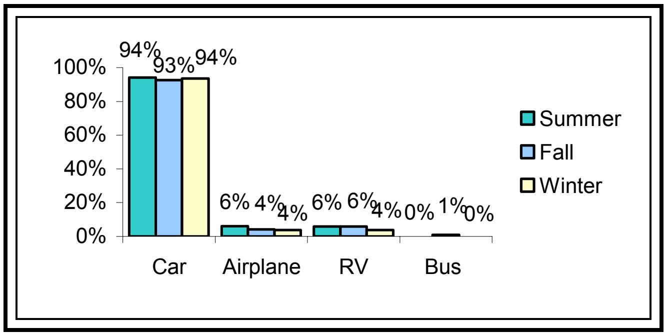
PRIZM$_{NE}$ Profiling Winter Visitors

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

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, 93% in the fall and 94% in the winter. The prevalence of people flying into the area was lower during the winter - just 4%.

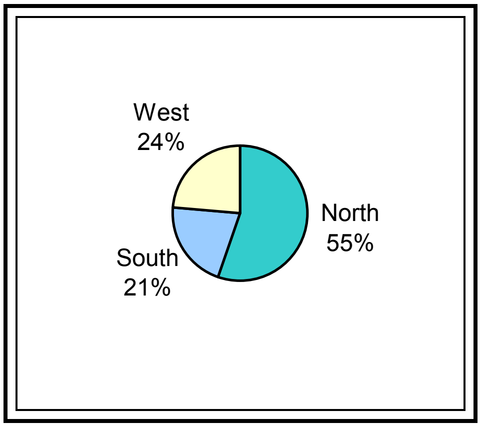
Transportation to the Outer Banks



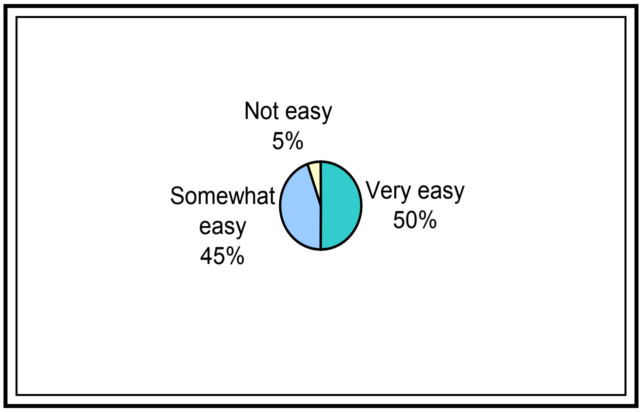
Because Outer Banks saw such high percentages of visitors arriving by car in the summer and fall waves of the survey, new information was gathering for winter. While there is a fairly even split between visitors coming from the west and the south, more than half of Outer Banks visitors are coming from the north. This is also evidenced by the origin of visitors discussed above and reinforces the idea that winter visitors to the Outer Banks could be winter "fleers" who are traveling farther south but stopping in the area.

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

Direction Traveled From

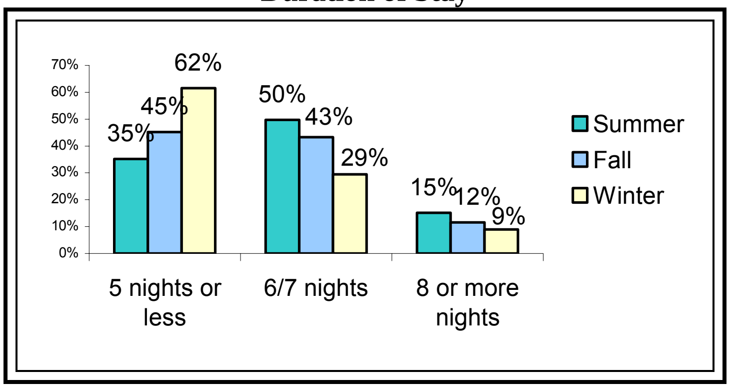


Ease of Access to Outer Banks

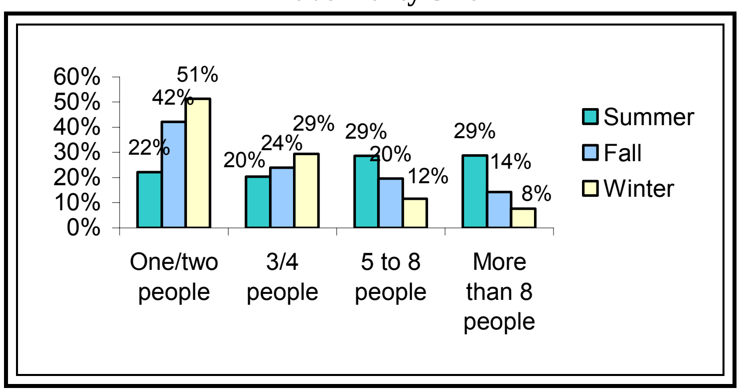


The average number of nights stayed for winter visitors continues to decrease the further away from peak travel. While the average summer trip was 6 nights in duration, with almost two-thirds of visitors staying at least 6 nights, winter trips averaged 5.2 days with 45% of respondents staying three nights or less.

Duration of Stay

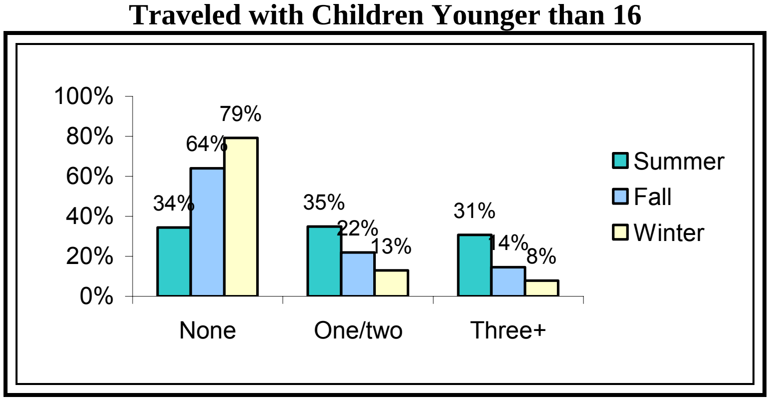


Travel Party Size



Travel party size also changes significantly during winter travel. The average party size was 7.1 people in the summer, 5.4 in the fall, and just 3.8 in the winter. As well, those traveling with children under age 16 continued to fall in the winter. Trips with children were dominant in the summer (64% included a child of 16 or under), and in the fall, 36% of trips included children 16 or younger. However, in winter, only 21% of trips were families traveling with young children.

Traveled with Children Younger than 16



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

Stayed During Visit to Outer Banks

Destination	Summer	Fall	Winter
Kill Devil Hills	14%	20%	26%
Nags Head	20%	18%	22%
Kitty Hawk	9%	15%	18%
Duck	12%	11%	8%
Avon	6%	7%	4%
Hatteras Island	7%	6%	5%
Corolla Light	8%	5%	5%
Ocracoke	1%	4%	5%
Buxton	5%	3%	4%
Southern Shores	4%	3%	1%
Rodanthe	3%	3%	6%
Waves	2%	3%	0%
Manteo or Roanoke Island	4%	2%	5%
Hatteras Village	2%	2%	1%
Salvo	1%	2%	0%
Frisco	4%	1%	0%

However, just because Kill Devil Hills, Nags Head and Kitty Hawk were the primary overnight destinations, winter visitors did not only visit those towns. Winter visitors who stayed elsewhere were most likely to visit Kitty Hawk, and some winter visitors traveled to multiple, outlying destinations. However, 44% of winter visitors did not travel to destinations other than their overnight location.

Additional Locations Visited by Winter Visitors

Town	%
Kitty Hawk	48%
Nags Head	38%
Kill Devil Island	35%
Hatteras Island	31%
Hatteras Village	26%
Manteo or Roanoke Island	24%
Duck	20%
Buxton	20%
Avon	20%
Rodanthe	17%
Southern Shores	16%
Salvo	14%
Frisco	12%
Waves	11%
None of these	44%

While rental properties were the most common type of accommodation for summer and fall visitors, usage fell off among winter visitors. Timeshares gained tremendous usage compared to summer, but overall, hotels were the most popular accommodation in winter, with half of all visitors in some type of hotel or motel.

The research among summer and fall visitors suggested that the use of rental properties was heavier among past visitors. However, for winter visitors, this was not necessarily true. While overall rental properties were utilized far less in the winter, loyal winter visitors were less likely (39%) to have stayed in rental accommodation than first time visitors (48%).

Type of Accommodation Used

Accommodations	Summer	Fall	Winter
A house rental on the beach	23%	24%	13%
A house rental not on the beach	28%	17%	4%
A condominium / timeshare	5%	17%	24%
A familiar chain motel or hotel with on-site amenities, e.g., restaurant or swimming pool	8%	16%	22%
A non-chain motel / hotel with on-site amenities, e.g., restaurant or swimming pool	7%	9%	12%
A campground or RV	11%	8%	6%
A familiar chain motel or hotel without on-site amenities	3%	7%	10%
A non-chain motel / hotel without on-site amenities	6%	4%	6%
Family or friends	4%	4%	4%
A bed & breakfast	3%	3%	5%
A cottage court	2%	2%	1%
A National park where you camped	5%	1%	0%
Other	3%	1%	3%

In developing marketing messages for audiences depending on travel season, it is important to know not only what activities are highly utilized during each season, but also how activities *vary* by season. For example, while visiting the ocean or beaches remains the most popular trip activity in winter with 92% participation, it loses ground, not surprisingly, when compared to summer visitors. So what is important to consider are the activities which gain significant participation with winter visitors – wildlife viewing and visiting National Parks and historic sites.

Activities during Trip – Differences between Winter & Summer Visitors

	Summer	Fall	Winter	Difference
Enjoy wildlife viewing/Bird watching	46.2%	42.4%	60.3%	14.1%
Visit the National Parks	59.7%	57.4%	73.1%	13.4%
Visit historic sites	71.4%	78.6%	84.6%	13.2%
Visit art or cultural museums or galleries	26.2%	24.5%	32.1%	5.8%
Take scenic drives along the coast	74.4%	75.8%	79.5%	5.1%
East at restaurants unique to the area	85.5%	82.8%	89.7%	4.3%
Visit shipwrecks/lifesaving stations	22.3%	19.8%	24.4%	2.0%
Visit lighthouses & other coastal relics	77.7%	76.0%	78.2%	0.5%

Golf	7.2%	8.7%	7.7%	0.5%
Attend musical performances	6.1%	3.1%	5.1%	-0.9%
Play tennis	2.8%	1.6%	1.3%	-1.5%
Attend theatre performances	5.9%	3.8%	3.8%	-2.0%
Attend festivals or craft fairs	8.7%	7.8%	5.1%	-3.5%
Enjoy scenic beauty	89.6%	88.7%	85.9%	-3.7%
Visit the ocean or beaches	97.0%	92.9%	92.3%	-4.7%
Go shopping	77.2%	72.9%	71.8%	-5.4%
Attend / participate in sporting events	8.2%	4.7%	1.3%	-7.0%
Go camping	13.9%	8.2%	6.4%	-7.5%
Go hiking or biking	36.2%	30.4%	24.4%	-11.9%
Canoeing or kayaking	15.6%	5.4%	0.0%	-15.6%
Take ferry	65.9%	41.2%	50.0%	-15.9%
Go fishing	36.0%	25.2%	19.2%	-16.8%

A final trip specific to consider is the money that visitors spent while visiting the Outer Banks. As discussed previously, because duration of stay and size of travel party decreased, it was expected that visitor expenditures for the winter visitors would also decrease, as it did. However, because the total trip expenditures were only slightly lower than the fall - $1,641 for fall visitors versus $1,370 for winter visitors – the average expenditure per person, per night increased from $61 to $70.

The distribution of expenditures for winter visitors was slightly different. What is most interesting is the decrease in lodging expenses. Though fall and winter visitors stayed nearly the same amount of time, the price of lodging was much cheaper in the winter. This could be because fewer visitors used rental accommodation and hotels offer extremely reduced rates in the off season.

However, the decrease in lodging expenditures was made up in an extreme percentage increase in transportation costs. As the price of gasoline continues to rise, it will be interesting to track if other expenditures decrease – as did winter visitors' expenditures on items such as meals and shopping.

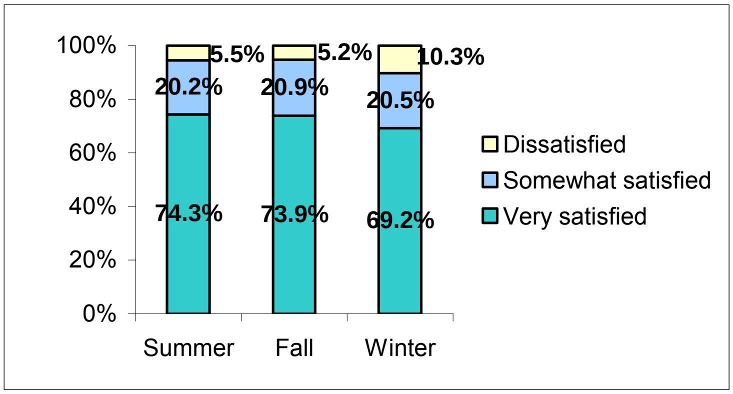
Visitors' Expenditures

	Summer		Fall		Winter	
Lodging	$1,468	55%	$827	50%	$474	35%
Meals/Food/Groceries	$471	17%	$340	21%	$291	21%
Entertainment, e.g., shows/theater/concerts	$57	2%	$23	1%	$28	2%
Shopping	$284	11%	$228	14%	$205	15%
Transportation	$253	9%	$139	8%	$272	20%
Attractions	$83	3%	$49	3%	$56	4%
Other	$75	3%	$35	2%	$45	3%
Total	**$2,691**		**$1,641**		**$1,370**	
Per person/per night	$61		$61		$70	

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 remains high, but more winter visitors were dissatisfied with their trip than their summer and fall counterparts.

Visitor Satisfaction

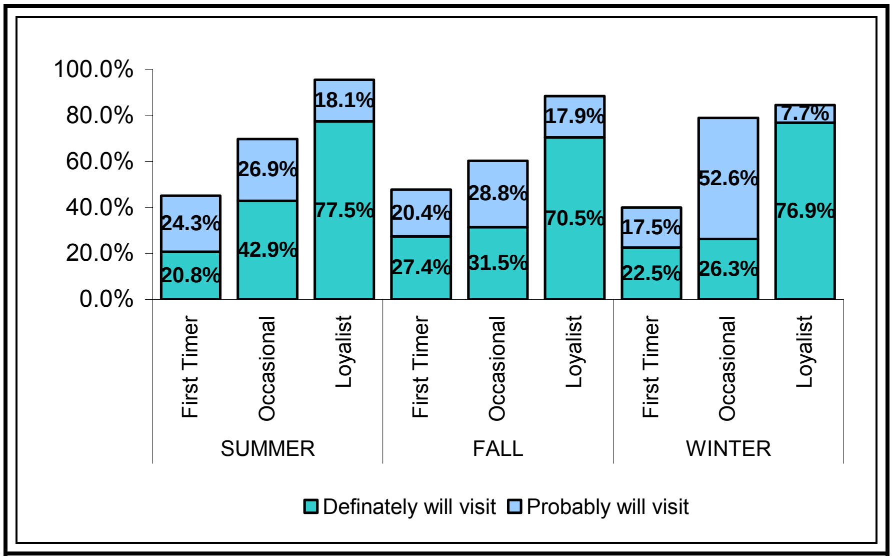


The decrease in satisfaction among winter visitors could be attributed merely the season and is not something the Outer Banks CVB can control. During this time of year, many attractions, shops and restaurants are closed. As well, much of the imagery surrounding the Outer Banks is focused on sand and water. And while those don't disappear in winter, their usability certainly decreases. Visitors may feel they were not provided with the experience for which they were hoping – their expectation of the Outer Banks did not change with the change in season.

However, this decrease in satisfaction leads to disappointing results when attempting to attract repeat visitors. Those who traveled to the Outer Banks in the winter were far less likely to consider visiting again. First time visitors were less likely than summer or fall visitors to consider coming at all, but what is most striking is the number of past visitors who said they definitely will travel back to the Outer Banks. There has been a steady drop over the seasons among occasional visitors who believe they will definitely be back in the area – from 42.9% in summer, to 31.5% in fall and 26.3% in winter.

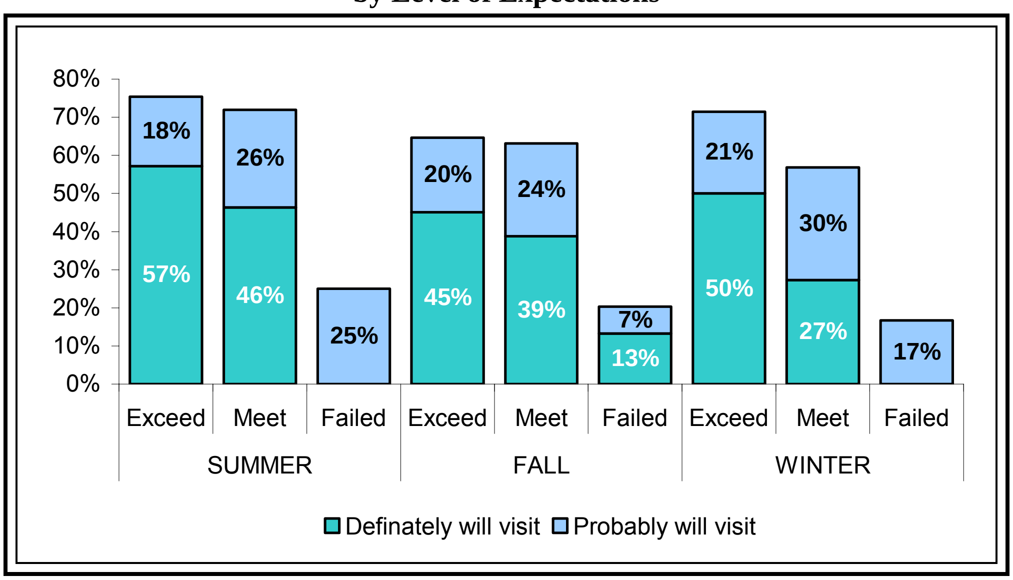
When asked why they are not considering future trips to the Outer Banks, visitors do not respond that they were dissatisfied with their trip to the Outer Banks, merely that there are so many other options of destinations they want to explore. Because of this, in order to attract repeat visitors, the CVB must develop ways for an additional trip to seem like another experience, rather than the same attractions, restaurants and lodging as previously offered. This could possibly be accomplished by promoting the out-of-the way towns that are rarely visited or the activities that are under utilized.

Likelihood to Visit



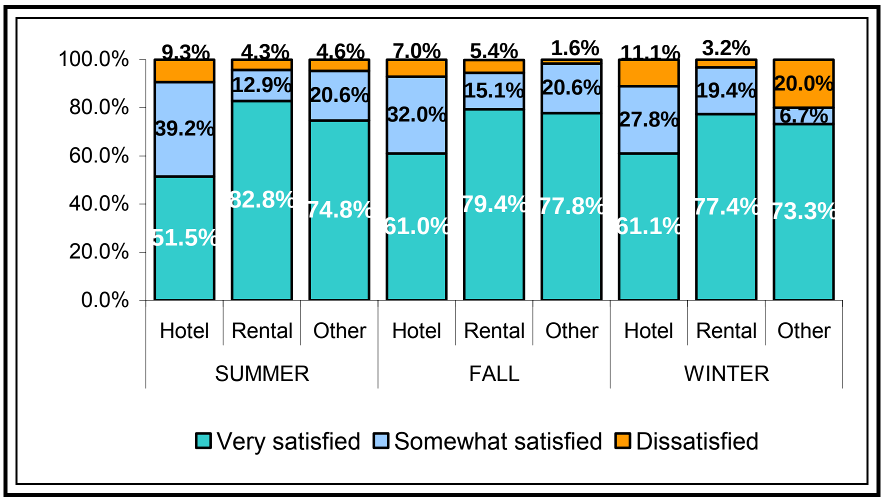
Though winter visitors were least likely to return of the three seasons explored (71% for summer, 62% for fall and 59% for winter), it is again seen that by exceeding expectations, the Outer Banks can garner repeat business.

Likelihood to Visit in Next Year by Level of Expectations



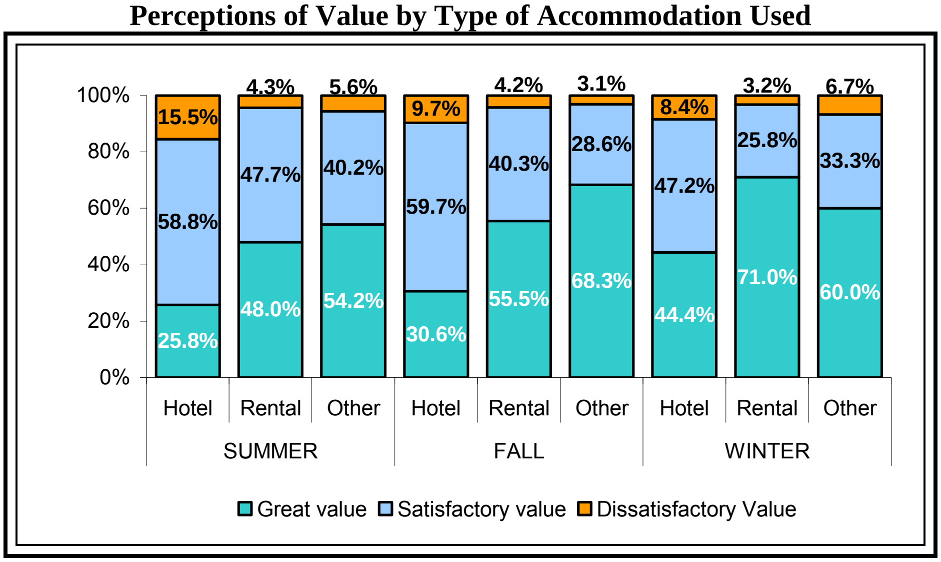
We saw winter visitors were the least satisfied of the three seasons with their trip to the Outer Banks and discussed it could be a result of attractions available during the off season and lack of opportunities in the winter months. However, when looking at type of accommodation, we see it has a great impact on satisfaction. Those in rented accommodations are consistently more satisfied than those in other lodging. Because winter had far fewer visitors in this type of highly-satisfying accommodation, it can be assumed that the increase in the use of hotels and other types of accommodation contributed to a depression in overall satisfaction ratings.

Satisfaction by Type of Accommodations Used



Though hotel and motel properties suffered from weak value perceptions in summer and fall, it increased slightly in winter. This is likely because the properties offer extremely reduced rates in the off season. But again, though they have better perceived value, the satisfaction of this type of accommodation continues to suffer.

Perceptions of Value by Type of Accommodation Used



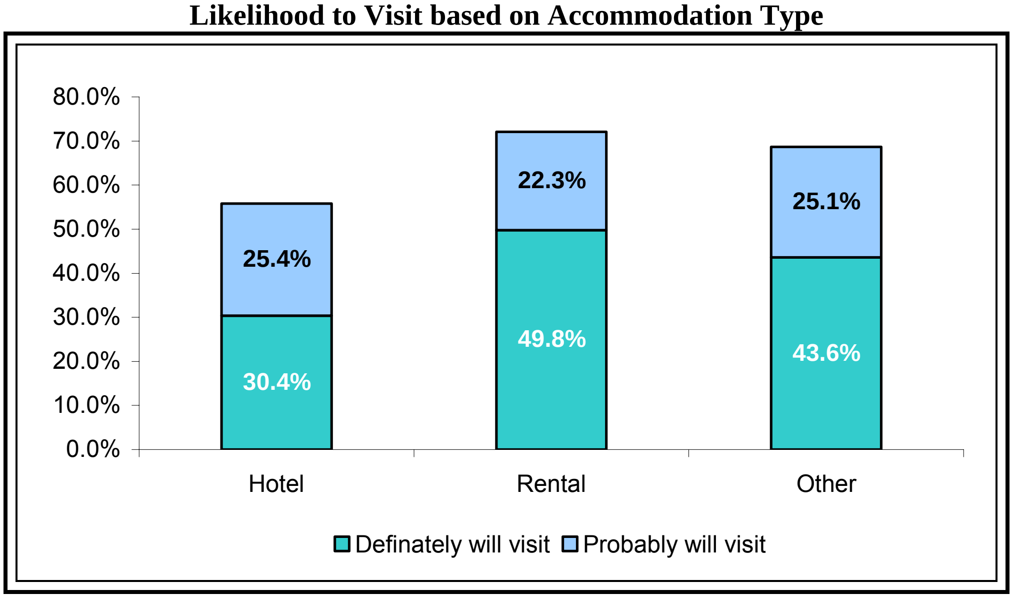
Winter accommodation ratings followed the patterns set in the summer and fall. Again, hotels are receiving lower ratings that other types of accommodation for cleanliness, value for the money, location and the courtesy/professionalism of the staff.

Accommodation Ratings

	Hotel			Rental			Other		
	Summer	Fall	Winter	Summer	Fall	Winter	Summer	Fall	Winter
Cleanliness	88%	94%	83%	91%	89%	94%	94%	91%	87%
Value	77%	89%	83%	93%	92%	97%	92%	84%	100%
Location	94%	98%	98%	95%	95%	98%	96%	92%	98%
Courtesy	91%	98%	92%	93%	90%	100%	97%	92%	87%

However, most concerning is that because those choosing hotel accommodation are less satisfied, they are the least likely to return to the Outer Banks. It would beneficial for the Outer Banks CVB to develop a program that would encourage hotel properties to provide an enhanced visitor experience.

Likelihood to Visit based on Accommodation Type



KEY FINDINGS

With the addition of winter visitors, some of the previous findings were reinforced while new information also surfaced. However, it should be noted that the survey sample for winter was disproportionately smaller than summer and fall. Though SMARI had a higher success rate for completed summer in the winter, there were fewer completed cards than the summer or fall, a result of fewer visitors in the off season.

Unlike summer and fall, beaches were not the primary motivator in winter. Scenic areas and good accommodations not only ranked as the primary motivators, they also saw the largest gains from summer motivations. Though beaches saw the biggest decrease compared to summer, it still ranks as one of highest motivators. Because of that, as was recommend in the summer and fall report, even in the off season, beaches should serve as the primary marketing image but be paired with different attributes, such as quality, unique accommodation.

The Outer Banks Visitors Bureau should work with local hotels and motels to increase visitor satisfaction with their properties. Based on the three season's worth of data, those who stay in a hotel are less likely to return to the area than those who stay in a rental property or some other type of lodging. The CVB could possibly work with properties to create an incentive (be it a coupon book for local attractions, % off in the Visitor Center store, free Ferry ride, etc) that was made only available to those in hotels – and clearly communicated that hotel guests are the only visitors receiving such a benefit.

Winter visitors came from a greater variety of markets than summer and fall visitors. There were increases in the Norfolk, VA market while Washington, DC decreases slightly (it was still the second highest market). Additional markets in which the Visitors Bureau does not advertise drew a greater percentage of travelers in the winter. When looking at this, combined with demographic data and the fact 55% of winter visitors are coming from the north, it is possible the Outer Banks is seeing a higher number of "snowbirds" stopping in the area on their way to Florida.

Winter has the greatest number of first-time visitors. This continues the trend seen in fall that those coming to the area in the summer appear to be doing so over-and-over again while those visiting in the off season are exploring for the first time. This reinforces the importance of these seasons.

Winter visitors continued the trends of both demographics and trip specifics as were seen in fall. The winter visitor is older than their summer and fall counterpart and while earning slightly less, tend to be better educated. Because more education traditionally leads to higher income, it is assume that many more of the visitors are retired. In addition, the winter visitor is more likely to be married and far less likely to have children. Winter trips were shorter and contained fewer people than their summer and fall counterparts. Dramatic differences are seen in who travels with children under 16. While 66% of summer visitors have children with them, only 21% of winter visitors have children along.

While winter visitors primarily overnighted in three communities, 66% visited more than one town. The overnight destinations were the larger communities that are easier to access. This is necessary because the winter visitors spent less time on their trip.

The type of accommodation varied greatly with winter visitors. Those traveling in the off season are far more likely to utilize hotel and motel accommodation rather than seeking a rental property. However, it appears because of that satisfaction with the Outer Banks decreased. Winter visitors who stayed in a hotel were less satisfied with their accommodation and did not perceive it to be a good value. Again, because of that, visitors in a hotel are less likely to return to the Outer Banks.

While satisfaction among fall and summer visitors was exactly the same, winter visitors were less satisfied with their experience. Because of that, winter visitors, especially first-time visitors, are less likely to return.

APPENDIX

Outer Banks Visitors Bureau
Updated – March 29, 2006

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

RE-INTRODUCE IF NECESSARY:

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

S1. Did you recently visit the Outer Banks?

1……..Yes
2……...No→THANK AND TERMINATE

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

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

1…North

2…South

3…West

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

1…Very easy

2…Somewhat easy

3…Not easy

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

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

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

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

4. I'd like you to consider the Outer Banks of North Carolina and rate some of its features as a travel destination. I'd like you to rate the Outer Banks based on your perceptions about how well it provides each of the features we will be discussing. We will be using a 4-point scale where a 4 means that the destination does an excellent job of providing this attribute and a 1 means that the Outer Banks provides no opportunity for the type of place or activity. How well does the Outer Banks provide…

ROTATE

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

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

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

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

   Traffic

   Overcrowding

   Quality of the beaches

   Customer Service

   Overdevelopment

   1…Gotten better

   2…Stayed the same

   3…Gotten a little worse

4…Gotten a lot worse

6. Over the past few years do you think that the Outer Banks has…
   1………. become a better destination
   2………..stayed about the same or
   3………..become a worse destination

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

____

Now I'd like to ask 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)_________________

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

12. Which of the following places or activities did you visit or participate in as a part of your trip?
    1…Visit historic sites
    2…Attend musical performances
    3…Attend theater performances
    4…Visit art or cultural museums or galleries
    5…Enjoy scenic beauty
    6…Visit the ocean or beaches
    7…Go hiking or biking
    8…Go camping
    9…Enjoy wildlife viewing/Bird watching
    10…Go fishing
    11…Canoeing or kayaking
    12…Go shopping
    13…Eat at restaurants unique to the area
    14…Attend festivals or craft fairs
    15…Take scenic drives along the coast
    16…Attend or participate in sporting events
    17…Golf
    18…Play tennis
    19…Take Ferry
    20…Visit lighthouses & other coastal relics
    21…Visit shipwrecks/lifesaving stations
    22…Visit the National Parks
    23…Other (SPECIFY) _________

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

1…….Charter fishing (off-shore)

2…….Pier fishing

3…….Surf fishing

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

a. Friendliness of staff
b. Staff's knowledge of local information

c. Appearance of the ferry and its facilities

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

1…………Travel to Ocracoke Island as your final destination

2…………Travel to Ocracoke Island and then further south to your final destination

3…………Travel to Ocracoke Island as a daytrip, returning to the Outer Banks

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

1………….Very likely

2………….Somewhat likely

3………….Not likely

13. Are you aware that the North Carolina Ferry System has a toll-free number for ferry information?

1…………Yes

2…………No

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

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

1…A familiar chain motel or hotel with on-site amenities such as a restaurant or swimming pool

2…A familiar chain motel or hotel without on-site amenities
3…A non-chain motel or hotel with onsite amenities such as a restaurant or swimming pool
4…A non-chain motel or hotel without on-site amenities
5…A Bed & Breakfast
6…A condominium or timeshare
7…A house rental on the beach
8…A house rental not on the beach
9…A Cottage Court
10…A campground or RV
11…A National Park where you camped
12…Family or Friends
13…Other (SPECIFY) ___________________

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

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

15a How would you rate the value of your accommodations? Would you say your accommodations were a…

   1…Great Value
   2…Satisfactory Value
   3…Less than Satisfactory Value
   4…Poor Value

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

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

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

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

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

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

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

____

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

19a. Why not?

____

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

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

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

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

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

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

6…REFUSED

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

26. What is your age?
    RECORD NUMBER _____________

THANK RESPONDENT
RECORD GENDER:
1…Male
2…Female

PHONE NUMBER _______________
INTERVIEWER NAME_____________
CUSID_____________________________
DATE OF INTERVIEW______________

INITIAL CONTACT CARD

OUTER BANKS NEEDS YOUR HELP!

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

- Name ____

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

e-mail address ____________________________________

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

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

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

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

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

Produced in cooperation with the Dare County Tourism Board

PRIZM$_{NE}$ Clusters

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.
10	Second City Elite	C1 Second City Society	Mature Years	There's money to be found in the nation's smaller cities, and you're most likely to find it in Second City Elite. The residents of these satellite cities tend to be prosperous execs who decorate their $200,000 homes with multiple computers, large-screen TV's, and an impressive collection of wines. With ore than half holding college degrees, Second City Elites enjoy cultural activities - from reading books to attending theater and dance productions.
11	God's Country	T1 Landed Gentry	Younger Years	When city dwellers & 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.
36	Blue-Chip Blues	S3 Middleburbs	Family Life	Known as a comfortable lifestyle for young, sprawling families with well paying blue-collar jobs. Ethnically diverse - with a significant presence of Hispanics and African-Americans - the segment's aging neighborhoods feature compact, modestly priced homes surrounded by commercial centers that cater to child-filled households.
37	Mayberry-ville	T2 Country Comfort	Younger Years	Like the old Andy Griffith Show set in a quaint picturesque berg, Mayberry-ville harks back to an old-fashioned way of life. In these small towns, middle-class couples & 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.
42	Red, White & Blues	T3 Middle America	Younger Years	These residents typically live in exurban towns rapidly morphing into bedroom suburbs. Their streets feature new fast food restaurants, and locals have recently celebrated the arrival of chains like Wal-Mart, Radio Shack, and Payless Shoes. Middle-aged, high school educated and lower-middle-class, these folks tend to have solid, blue-collar jobs in manufacturing, milling and construction.
43	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.
48	Young & Rustic	T4 Rustic Living	Younger Years	Like the soap opera that inspired its nickname, the Young & Rustic segment is composed of young, restless singles. Unlike the glitzy soap denizens, however, these folks tend to be lower income, high school educated and live in tiny apartments in the nation's exurban towns. With their service industry jobs and modest incomes, these folks still try to fashion fast-paced lifestyles centered on sports, cars and dating.
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

Q6a	**Why do you feel the Outer Banks has become a better destination**
winter	I simply enjoy the Outer Banks. Yes, the traffic is worse [and] the over crowding is worse. I have been traveling, sometimes twice a year, to the Outer Banks for over the last twenty years. I will continue to do so while i can, regardless of the conditions.
winter	More things to do for all age groups; attractions staying open later
winter	One of our favorite places made a little easier by the routes to get to it.
Q6a	**Why do you feel the Outer Banks has become a worse destination**
winter	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.
winter	Coastal beach areas are becoming limited. Outer Banks continue to develop more and more at a greater and greater expense.
winter	Over building and over commercializing. It has been about thirty years since I have been there so maybe my comments have not been fair
winter	Too much development! Miles of ugly condos and houses.
winter	Development, traffic, expense of accommodations/restaurants/gas, etc
winter	The beach-goers leave large amounts of trash on the beaches for someone to pick up -- beer/soda cans, broken tents, etc. There appears to be a total disregard to keeping the beaches clean. These conditions were noticed in Currituck.
Q14a	**Why did you choose to stay in a rental home instead of a hotel?**
winter	We wanted the house atmosphere where we could take a dog.
winter	It was a large group, and we wanted to stay together.
winter	More privacy.
winter	We wanted the more private atmosphere, and we very rarely stay in hotels. We most of the time stay in rented homes or timeshares whenever on vacation.
Q18a	**Why did the Outer Banks fall short of your expectations?**
winter	We were there in January. Many attractions were closed. The open shopping was all tourist/commercial schlock. We usually enjoy shopping for souvenirs. Except for the national seashore, ALL of the beachfront was lined with million dollar houses.
winter	It was too congested, and not what we expected
winter	I thought the accommodations along the ocean were frumpy and blocked access to the beaches.
winter	Bad time right after Christmas.
winter	I was hoping that some of the storms had washed away some of the coastal buildings and that nature had taken over again. The traffic has gotten much worse than the last time I came.
Q19a	**Why will you not visit the Outer Banks next year?**
winter	It did not appeal to us.
winter	Now that I have seen the Outer Banks, one is enough.
winter	We are planning different trips this year.
winter	Because your fine State Patrol decided to pick me out of a line of cars (all traveling at the same speed) to give a speeding ticket (of course I'm from out of the state)...
winter	It was just a one time thing, and we just wanted to see it just once
winter	I am expecting a child this year. Not going that far away from home.
winter	It was just a one time thing and we just wanted to see it just once.
winter	We have family all over the US. There is a limit as to how much time and money we spend on travel and vacation. We plan to come back to the Outer Banks again, just not this next

	year.
winter	There are other places to go for variety.
winter	Been there done that.
winter	We want to go other places next year. We do plan to go to the outer banks again in the future.
winter	Will probably visit other parts of US, and maybe someday return
winter	Other places to visit next year
winter	Another trip planned.
winter	Going elsewhere.
winter	We're just taking day trips this year.