Presentation Outline

• Defining a Tourist Economy
• The Survey
• Survey Results
• Discussion
Dare Annual Wage to NC Annual Wage

- Other
- Public Administration
- Other Services Ex. Public Admin
- Accommodation and Food Services
- Arts Entertainment and Recreation
- Healthcare and Social Assistance
- Educational Services
- Administrative and Waste Services
- Professional and Technical Services
- Real Estate and Rental and Leasing
- Finance and Insurance
- Information
- Transportation and Warehousing
- Retail Trade
- Wholesale Trade
- Manufacturing
- Construction
- Utilities
- Total All Industries
### Average Annual Wage

<table>
<thead>
<tr>
<th>Industry</th>
<th>North Carolina</th>
<th>Dare County</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total All Industries</td>
<td>39,531</td>
<td>28,078</td>
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<tr>
<td>Utilities</td>
<td>71,894</td>
<td>63,782</td>
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<tr>
<td>Construction</td>
<td>39,743</td>
<td>35,448</td>
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<tr>
<td>Manufacturing</td>
<td>47,679</td>
<td>37,844</td>
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<tr>
<td>Wholesale Trade</td>
<td>56,454</td>
<td>30,614</td>
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<tr>
<td>Retail Trade</td>
<td>24,264</td>
<td>23,871</td>
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<tr>
<td>Transportation and Warehousing</td>
<td>41,284</td>
<td>34,496</td>
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<td>Information</td>
<td>57,361</td>
<td>37,625</td>
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<tr>
<td>Finance and Insurance</td>
<td>70,306</td>
<td>46,826</td>
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<tr>
<td>Real Estate and Rental and Leasing</td>
<td>36,797</td>
<td>23,623</td>
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<td>Professional and Technical Services</td>
<td>60,295</td>
<td>43,023</td>
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<td>Administrative and Waste Services</td>
<td>27,556</td>
<td>22,410</td>
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<td>Educational Services</td>
<td>38,834</td>
<td>38,018</td>
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<tr>
<td>Health Care and Social Assistance</td>
<td>39,241</td>
<td>38,231</td>
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<tr>
<td>Arts Entertainment and Recreation</td>
<td>29,371</td>
<td>23,761</td>
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<tr>
<td>Accommodation and Food Services</td>
<td>13,839</td>
<td>17,366</td>
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<tr>
<td>Other Services Ex. Public Admin</td>
<td>25,576</td>
<td>21,137</td>
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<tr>
<td>Public Administration</td>
<td>41,173</td>
<td>41,609</td>
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<tr>
<td>Other</td>
<td>65,278</td>
<td>33,401</td>
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</table>
Outer Banks Resident Employment
Year-to-Year Percent Change
Tourism Difficulties & Opportunities

- Resident and Non-resident Demands
- Non-Resident Inflow of Dollars
Investment Comparison

Year | Sales to Levy | S&P 500
--- | --- | ---
1996 | 20% | 40%
1997 | 22% | 42%
1998 | 24% | 44%
1999 | 26% | 46%
2000 | 28% | 48%
2001 | 30% | 50%
2002 | 32% | 52%
2003 | 34% | 54%
2004 | 36% | 56%
2005 | 38% | 58%
2006 | 40% | 60%
2007 | 42% | 62%
2008 | 44% | 64%
Tourism Opportunities

• Expansion of the tourism base
  – New visitors & new services
  – Eliminating the seasonality

• Cost Savings and other Sustainable Measures
  – Recycling
  – Energy conservation

• Tourism = Economic Development
  – Depends upon leadership and cooperation – of all advocate groups and businesses
Focus Groups:

- Local full-time residents including home owners and renters
- Local business owners and operators
- Second home and investment home owners
- City and environmental planners
Issues Affecting the Study Area

- Land Use
- Influx of Second Homes
- Tourism Oriented Economic Structure
- Cost of Living
- Real Estate Prices
- Jobs and Job Growth
- Affordable Housing Choices for Work Force and Local Residents
- Transportation
- Environmental Issues
To provide information for stakeholders in their efforts to maintain their community sense of place;

To understand the impacts of tourism development on land use, economy, service provision, cultural opportunities, infrastructure, environment and quality of life;

To estimate local residents’ and second home owners’ perceptions on sustainable actions and tourism;
To understand the economic impact of the construction of, and services for, second homes and their owners, along with patterns of use, occupancy and local expenditures;

To understand the effects of second homes owners on the type and numbers of business service and government offerings should they become permanent residents;

To make implications of policy and business decisions on the environmental future of the community --- issues related to energy, climate, water, waste and land use.
Qualitative focus groups
- Establish an understanding of the perceptions of the tourism industry
- Determine the primary issues and concerns regarding the impact that tourism has on the community

Quantitative survey
- Estimate the extent and degree of perceptions regarding the concerns and issues expressed by the focus groups
- Compare perceptions of tourism’s impact on community life between local residents and second home owners
Dare Population and Housing Estimates

<table>
<thead>
<tr>
<th>Year</th>
<th>Population</th>
<th>Housing Units</th>
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</thead>
<tbody>
<tr>
<td>1960</td>
<td>5,935</td>
<td>3,198</td>
</tr>
<tr>
<td>1970</td>
<td>6,995</td>
<td>5,057</td>
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<tr>
<td>1980</td>
<td>13,377</td>
<td>11,006</td>
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<tr>
<td>1990</td>
<td>22,746</td>
<td>21,567</td>
</tr>
<tr>
<td>2000</td>
<td>29,967</td>
<td>26,671</td>
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<tr>
<td>2007</td>
<td>33,776</td>
<td>32,358</td>
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</table>
Conducted focus groups: local residents, business owners, public officials, second home owners

Sample is drawn from the census of property owners in Dare County as of November 2008 (Dare County Tax Records)

Survey of property owners (4,000 local residents and 4,000 non-residents), as identified by the address to send the tax record.

Current response from survey provided 95% confidence for the two groups (residents and non-residents)
Survey Demographics: Age

- 1% Residents 0% Non-Residents
- 3% Residents 1% Non-Residents
- 14% Residents 4% Non-Residents
- 22% Residents 24% Non-Residents
- 23% Residents 33% Non-Residents
- 20% Residents 24% Non-Residents
- 6% Residents 5% Non-Residents
- 2% Residents 2% Non-Residents

Age Groups:
- 25 and under
- 26-34
- 35-44
- 45-54
- 55-64
- 65-74
- 75 and older
- Missing
Survey Demographics: Ethnicity

- Caucasian: 92.5% Non-Residents, 93.4% Residents
- Other: 2.4% Non-Residents, 2.2% Residents
- Hispanic: 0.8% Non-Residents, 0.4% Residents
- African-American: 0.5% Non-Residents, 0.2% Residents
- American Indian: 0.3% Non-Residents, 0.0% Residents
- Asian: 0.8% Non-Residents, 0.2% Residents
- Missing: 2.2% Non-Residents, 3.5% Residents
- Non-Residents: 93.4%
- Residents: 92.5%
Survey Demographics: Education

- **Less than High school**: 1% (Residents), 0% (Nonresidents)
- **High school or GED**: 8% (Residents), 5% (Nonresidents)
- **2-year college/Technical school**: 13% (Residents), 8% (Nonresidents)
- **Some college, but no degree**: 23% (Residents), 12% (Nonresidents)
- **4-year college**: 30% (Residents), 32% (Nonresidents)
- **Post graduate**: 24% (Residents)
- **Missing**: 2% (Residents), 3% (Nonresidents)
Survey Demographics: Annual Household Income

- **Residents**
  - 0-14,999: 1%
  - 15,000-24,999: 2%
  - 25,000-34,999: 8%
  - 35,000-49,999: 13%
  - 50,000-74,999: 21%
  - 75,000-99,999: 13%
  - 100,000-149,999: 17%
  - 150,000-199,999: 24%
  - 200,000-399,999: 16%
  - 400,000+: 21%
  - Missing: 17%

- **Non-Residents**
  - 0-14,999: 0%
  - 15,000-24,999: 1%
  - 25,000-34,999: 2%
  - 35,000-49,999: 13%
  - 50,000-74,999: 11%
  - 75,000-99,999: 15%
  - 100,000-149,999: 15%
  - 150,000-199,999: 7%
  - 200,000-399,999: 4%
  - 400,000+: 4%
  - Missing: 10%
Survey Demographics: Employment Status

- Working full-time: Residents (30%) vs. Nonresidents (41%)
- Working part-time: Residents (9%) vs. Nonresidents (8%)
- Own my own business: Residents (20%) vs. Nonresidents (12%)
- Looking for work: Residents (2%) vs. Nonresidents (0%)
- Retired: Residents (30%) vs. Nonresidents (32%)
- Other: Residents (6%) vs. Nonresidents (4%)
- Missing: Residents (3%) vs. Nonresidents (3%)
Why do you choose to live in Dare County? (Full Time Residents)

- I like the scenery: 61%
- I like the climate: 61%
- I like the small town atmosphere: 49%
- This is where I have retired/plan to retire: 46%
- The recreational opportunities: 43%
- This is a very friendly place: 39%
- My job is here: 32%
- To be with my spouse: 22%
- To be with my family: 21%
- Other: 20%
- To be with my longtime friends: 13%
- Because of the job opportunities: 8%
- I was born here: 8%
- More affordable than other coastal areas: 7%
Why did You buy Your Second Home Property in Dare County
(Second Home Owners)

- The beach: 90%
- Investment value: 61%
- Recreational opportunities: 50%
- Climate of the area: 45%
- Friendliness of the area: 45%
- Affordability of the area: 32%
- Rental value: 26%
- Culture / history of the area: 26%
- Proximity to permanent residence: 25%
- Air and water quality: 24%
- Closeness to family / friends: 18%
- Other: 14%
Tourism Development and Land Use

Non-Residents

- The amount of residential development
- The amount of non-tourism commercial development
- The amount of tourism commercial development

Residents

- The amount of residential development
- The amount of non-tourism commercial development
- The amount of tourism commercial development
Tourism Development and Cultural Opportunities

Non-Residents

- Recreational Opportunities for Young People
- Entertainment Opportunities
- Relationships b/w international works/international visitors and local residents
- Number of Cultural Offerings
- Mix of Cultural Offerings

Residents

- Recreational Opportunities for Young People
- Entertainment Opportunities
- Relationships b/w international works/international visitors and local residents
- Number of Cultural Offerings
- Mix of Cultural Offerings

Legend:
- Unknown
- Not Satisfied
- Somewhat Satisfied
- Satisfied
- Highly Satisfied
Tourism Development and Infrastructure

**Non-Residents**
- The management of traffic generated by tourists
- The proposal for a new bridge over the Currituck Sound
- The proposal for the replacement of the Bonner Bridge
- Adequacy and cost-effectiveness of internet technology to attract and...
- The presence of parks, greenways, and bike lanes throughout Dare...
- Public transportation within Dare County for seasonal workers,...
- Access to and from Dare County during tourist season
- Current policies regarding beach driving in your area

**Residents**
- The management of traffic generated by tourists
- The proposal for a new bridge over the Currituck Sound
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- Current policies regarding beach driving in your area
Tourism Development and Quality of Life

**Non-Residents**

- Water quality
- Air quality
- Availability of child care
- Quality of healthcare services
- Availability of healthcare facilities
- The amount of affordable housing options
- The range of housing styles, designs, and affordability

**Residents**

- Water quality
- Air quality
- Availability of child care
- Quality of healthcare services
- Availability of healthcare facilities
- The amount of affordable housing options
- The range of housing styles, designs, and affordability
Sustainable Practices

1. Train employees on sustainability practices;
2. Support companies that perform sustainable practices;
3. Provide economic benefits for the community;
4. Preserve local culture;
5. Provide noise;
6. Protect air quality;
7. Use public land for tourism;
8. Conserve natural environment;
9. Use energy efficiently;
10. Manage wastewater;
11. Manage solid waste;
12. Manage gas emissions;
13. Reduce fresh water consumption.
14. Keep the economy vibrant.
To What Extent is it Important to Take Action in the following Areas to Ensure that Dare County Tourism Stays Strong?

Conserving the natural environment
Being energy efficient
Managing wastewater
Reducing consumption of fresh water
Managing, reducing, and recycling solid waste
Reducing/managing greenhouse gas emissions

Important & Very Important
Resident
Non-Resident

Not Important
Resident
Non-Resident
To What Extent is it Important to Take Action in the following Areas to Ensure that Dare County Tourism Stays Strong?

- Training and educating employees and clients on sustainability practices
- Purchasing from companies with certified green practices
- Providing economic benefits to local communities
- Preserving the culture of local communities
- Reducing noise
- Protecting air quality
- Use of public land for tourism

<table>
<thead>
<tr>
<th>Area</th>
<th>Resident (Important &amp; Very Important)</th>
<th>Resident (Not Important)</th>
<th>Non-Resident (Important &amp; Very Important)</th>
<th>Non-Resident (Not Important)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Training and educating employees and clients on sustainability practices</td>
<td>60%</td>
<td>20%</td>
<td>60%</td>
<td>20%</td>
</tr>
<tr>
<td>Purchasing from companies with certified green practices</td>
<td>60%</td>
<td>20%</td>
<td>60%</td>
<td>20%</td>
</tr>
<tr>
<td>Providing economic benefits to local communities</td>
<td>80%</td>
<td>20%</td>
<td>80%</td>
<td>20%</td>
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<tr>
<td>Preserving the culture of local communities</td>
<td>80%</td>
<td>20%</td>
<td>80%</td>
<td>20%</td>
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<tr>
<td>Reducing noise</td>
<td>60%</td>
<td>20%</td>
<td>60%</td>
<td>20%</td>
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<tr>
<td>Protecting air quality</td>
<td>80%</td>
<td>20%</td>
<td>80%</td>
<td>20%</td>
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<tr>
<td>Use of public land for tourism</td>
<td>60%</td>
<td>20%</td>
<td>60%</td>
<td>20%</td>
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Summary

Questions & Discussion