



Tourism and the Dare County Economy

Bureau of Business Research

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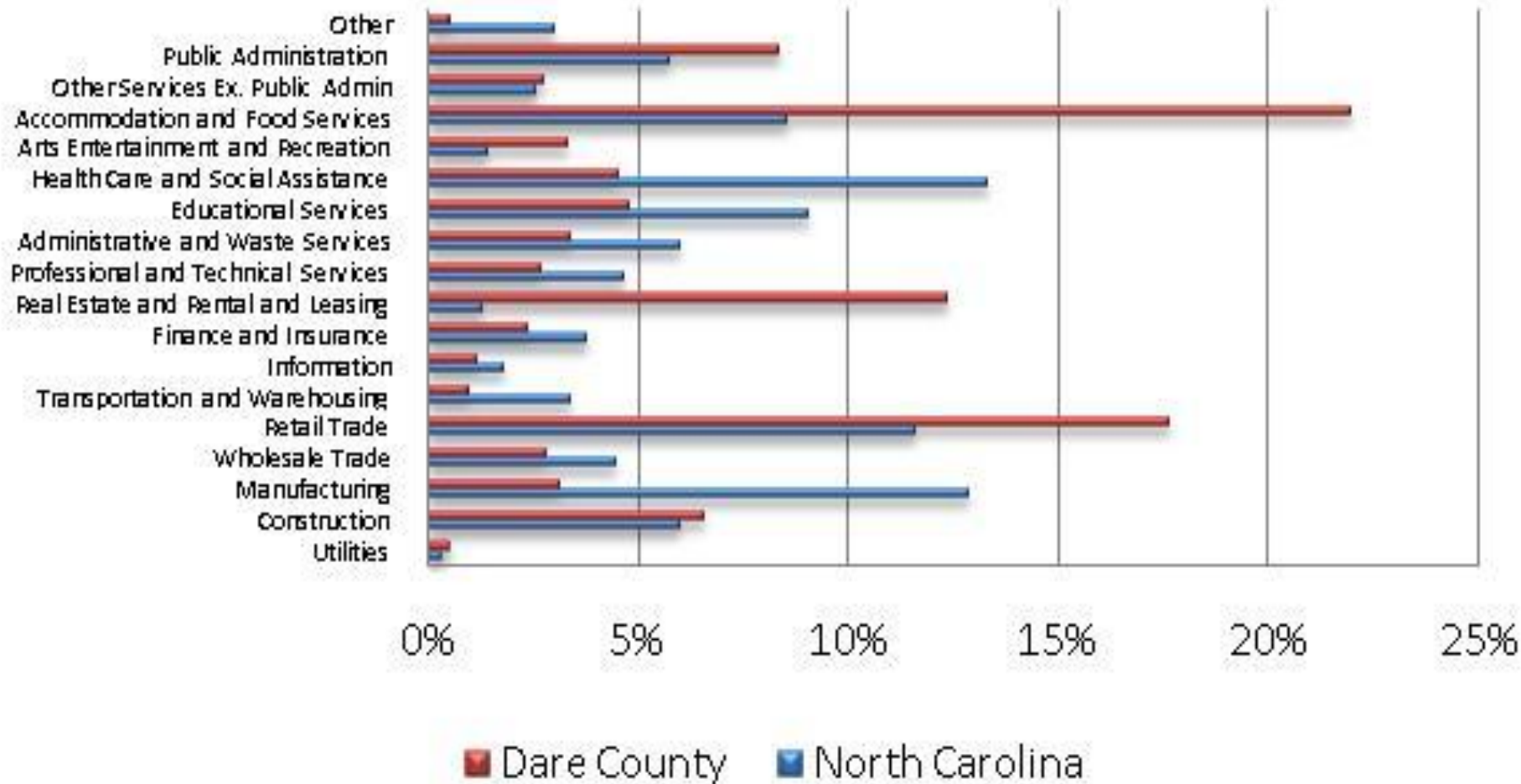
Huili Hao & Pat Long

East Carolina University

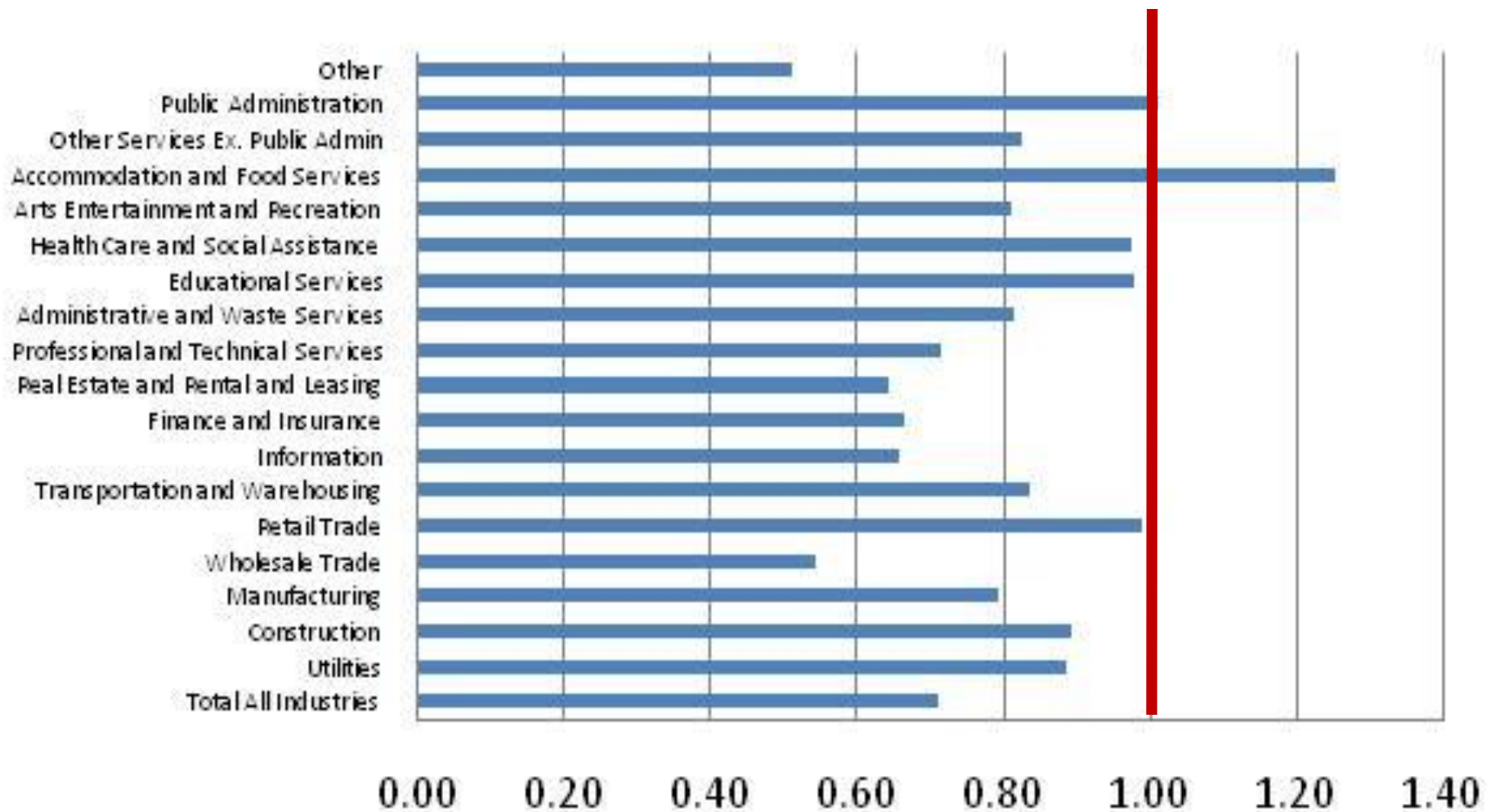
Presentation Outline

- Defining a Tourist Economy
- The Survey
- Survey Results
- Discussion

Industry Share of Jobs



Dare Annual Wage to NC Annual Wage

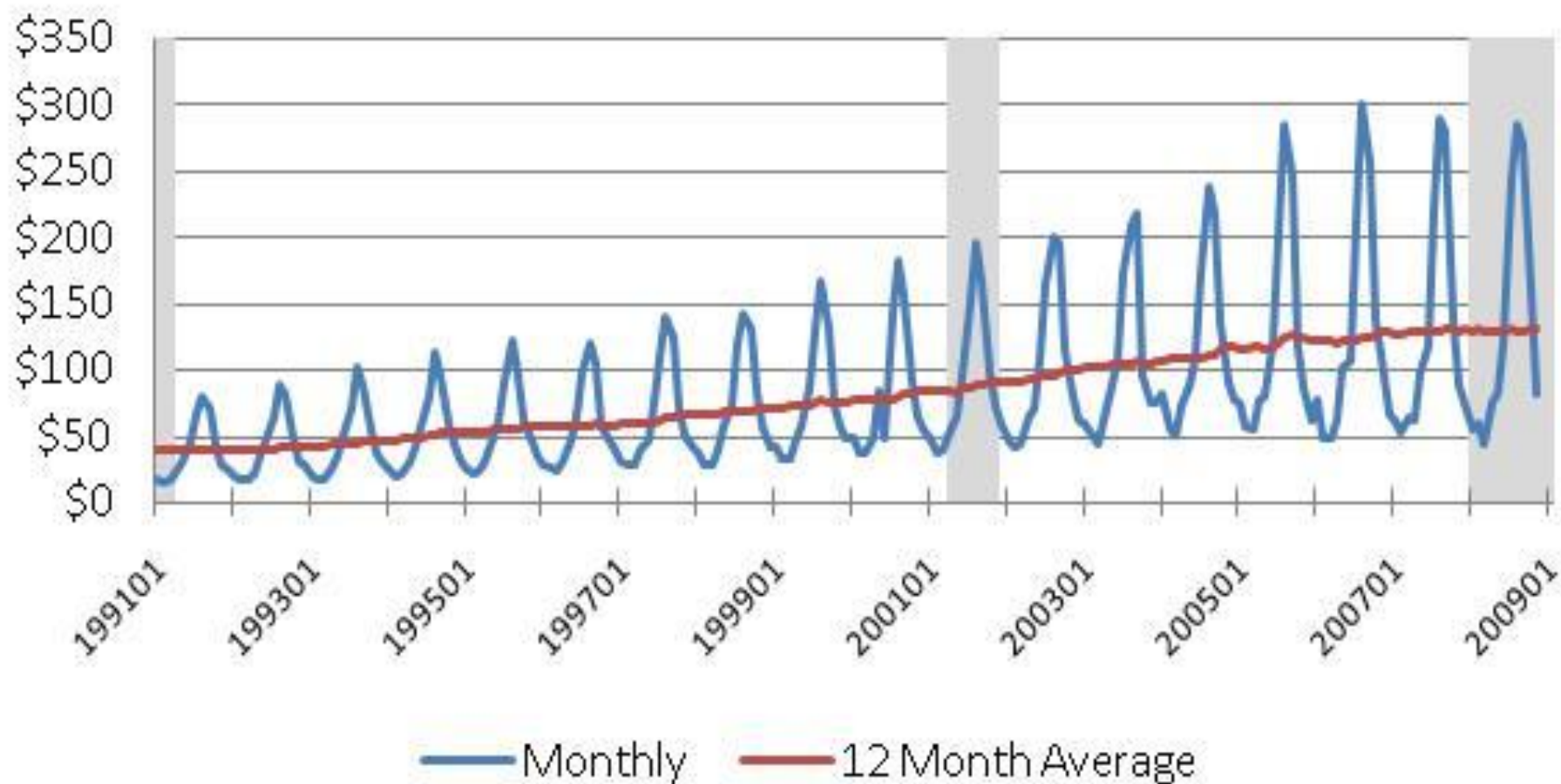


Average Annual Wage

	North Carolina	Dare County
Total All Industries	39,531	28,078
Utilities	71,894	63,782
Construction	39,743	35,448
Manufacturing	47,679	37,844
Wholesale Trade	56,454	30,614
Retail Trade	24,264	23,971
Transportation and Warehousing	41,284	34,496
Information	57,361	37,625
Finance and Insurance	70,306	46,826
Real Estate and Rental and Leasing	36,797	23,623
Professional and Technical Services	60,295	43,023
Administrative and Waste Services	27,556	22,410
Educational Services	38,834	38,018
Health Care and Social Assistance	39,241	38,231
Arts Entertainment and Recreation	29,371	23,761
Accommodation and Food Services	13,839	17,366
Other Services Ex. Public Admin	25,576	21,137
Public Administration	41,173	41,609
Other	65,278	33,401

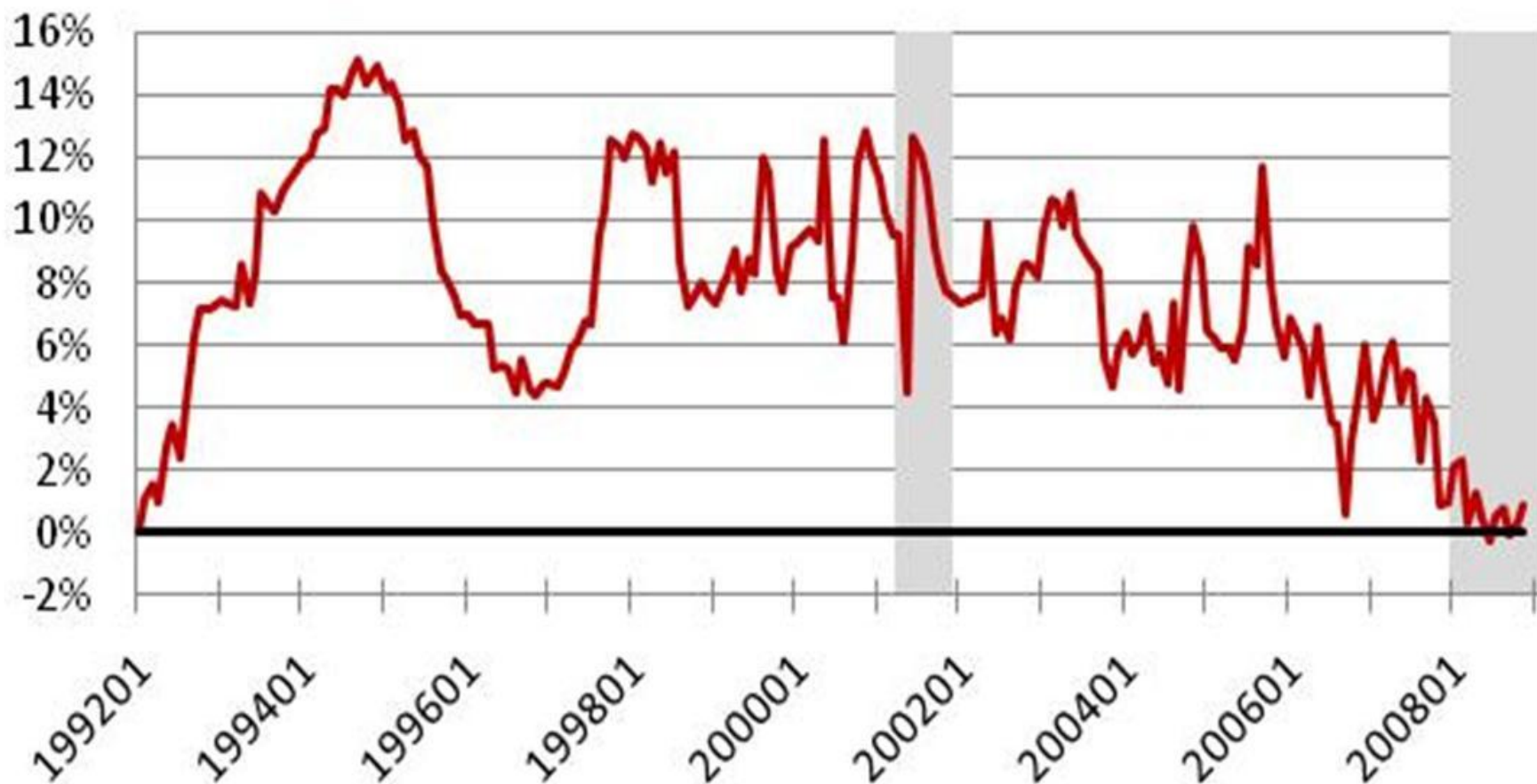
Dare County Retail Sales

Millions of Dollars



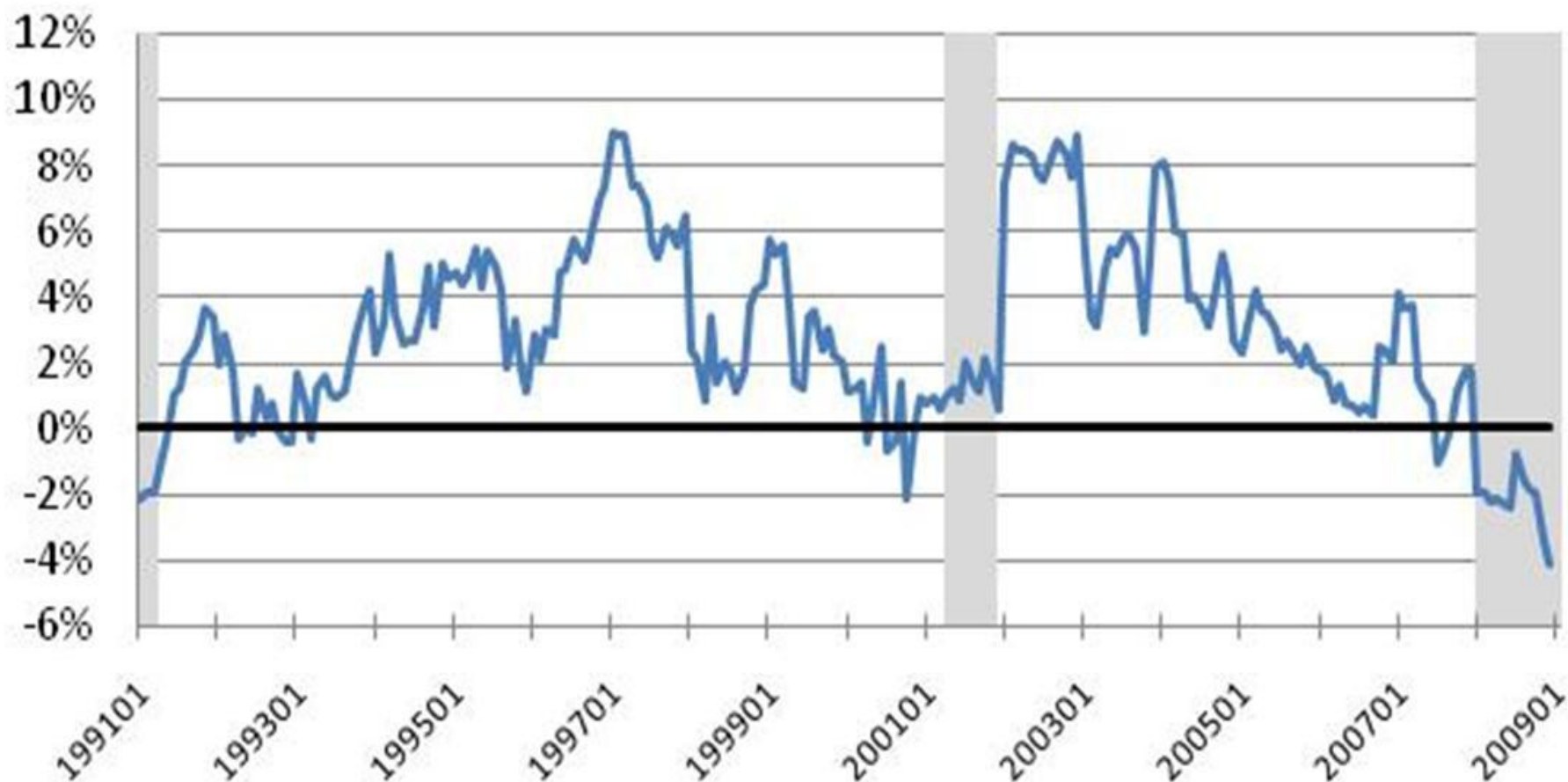
Outer Banks Retail Sales

Year-to-Year Percent Change in 12 Month Average



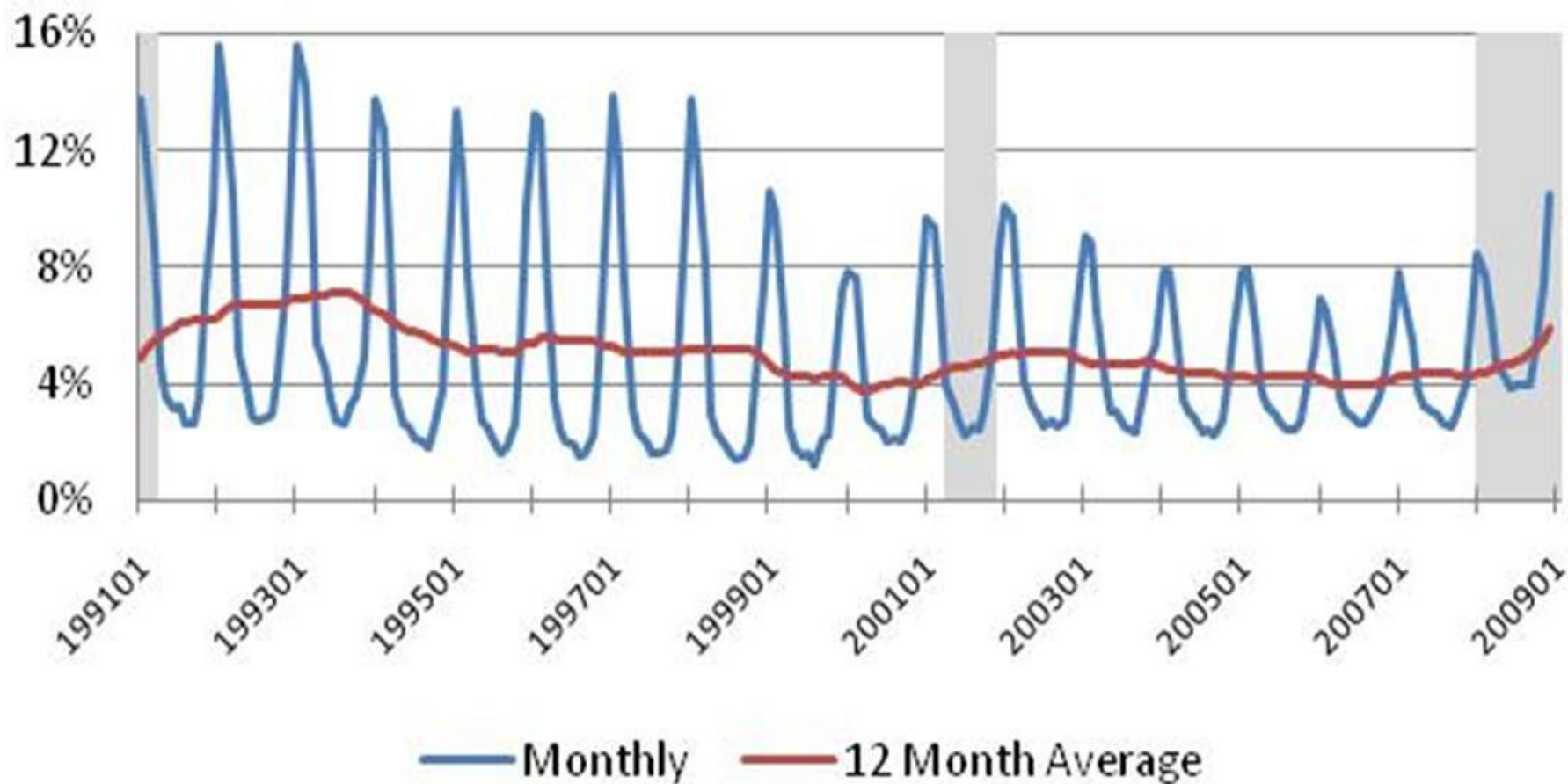
Outer Banks Resident Employment

Year-to-Year Percent Change



Outer Banks Unemployment Rate

Percent of Labor Force

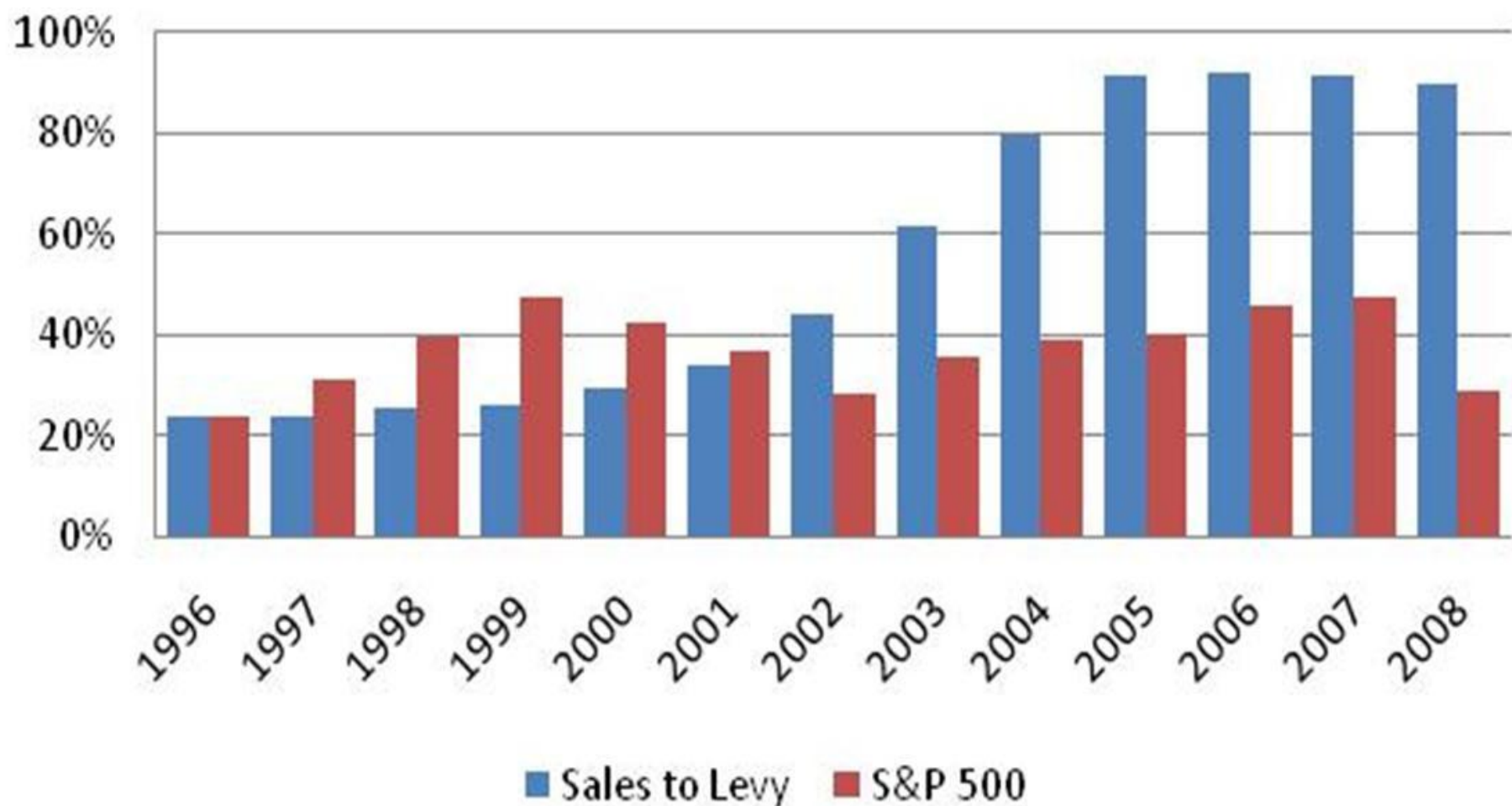


Tourism Difficulties & Opportunities



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

Investment Comparison



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

Dare County Tourism Impact Study

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

Objectives of Current Study

- 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;

Objectives of Current Study

- 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.

Dare County Tourism Impact Study

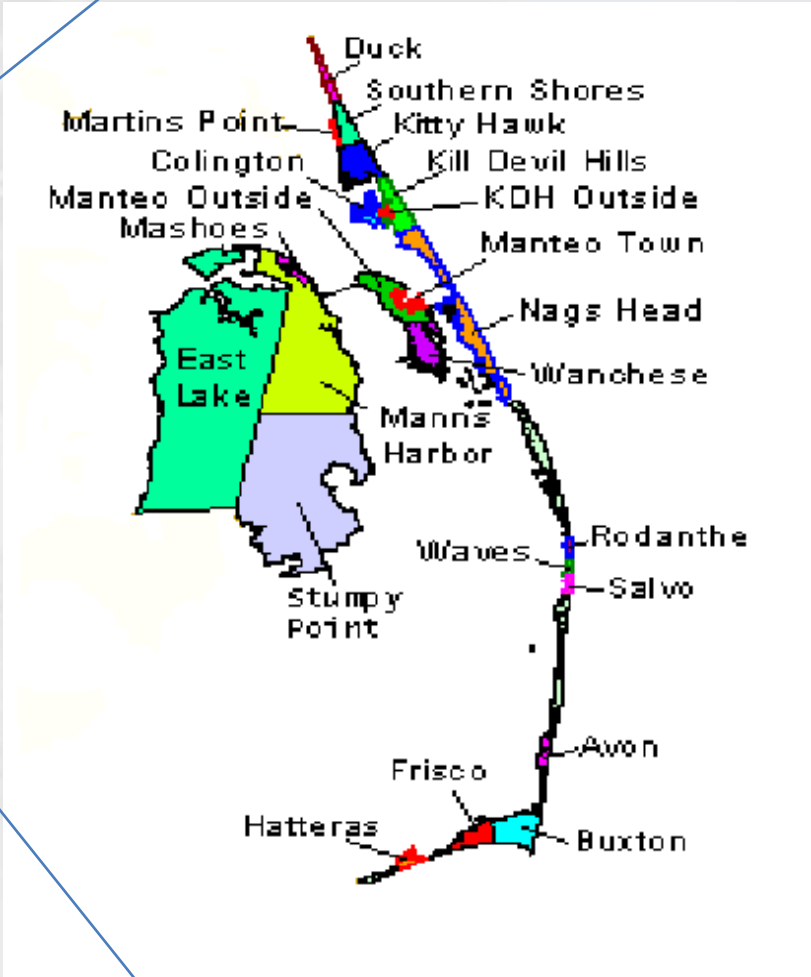
■ Qualitative focus groups

- ✓ 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

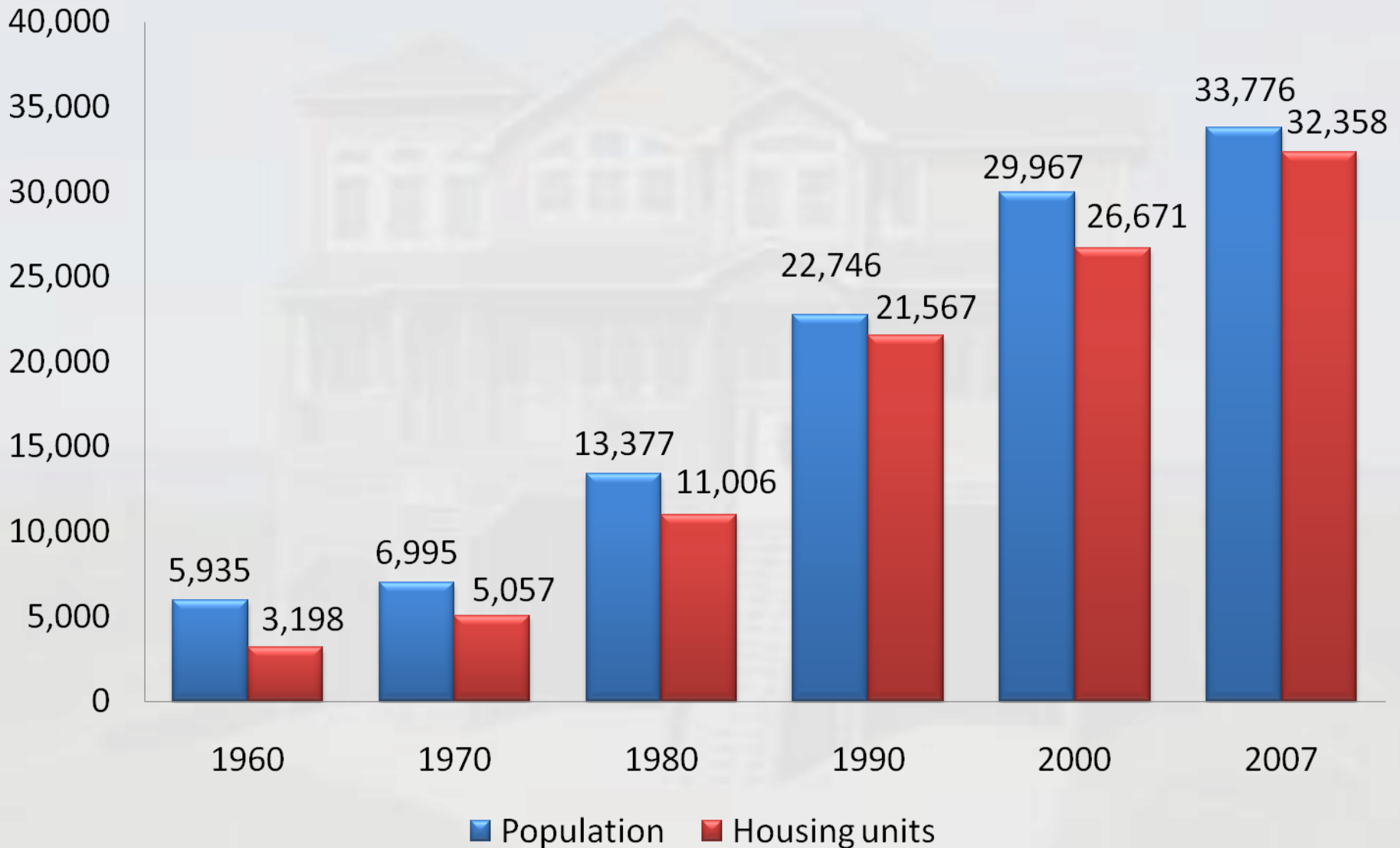
Dare County



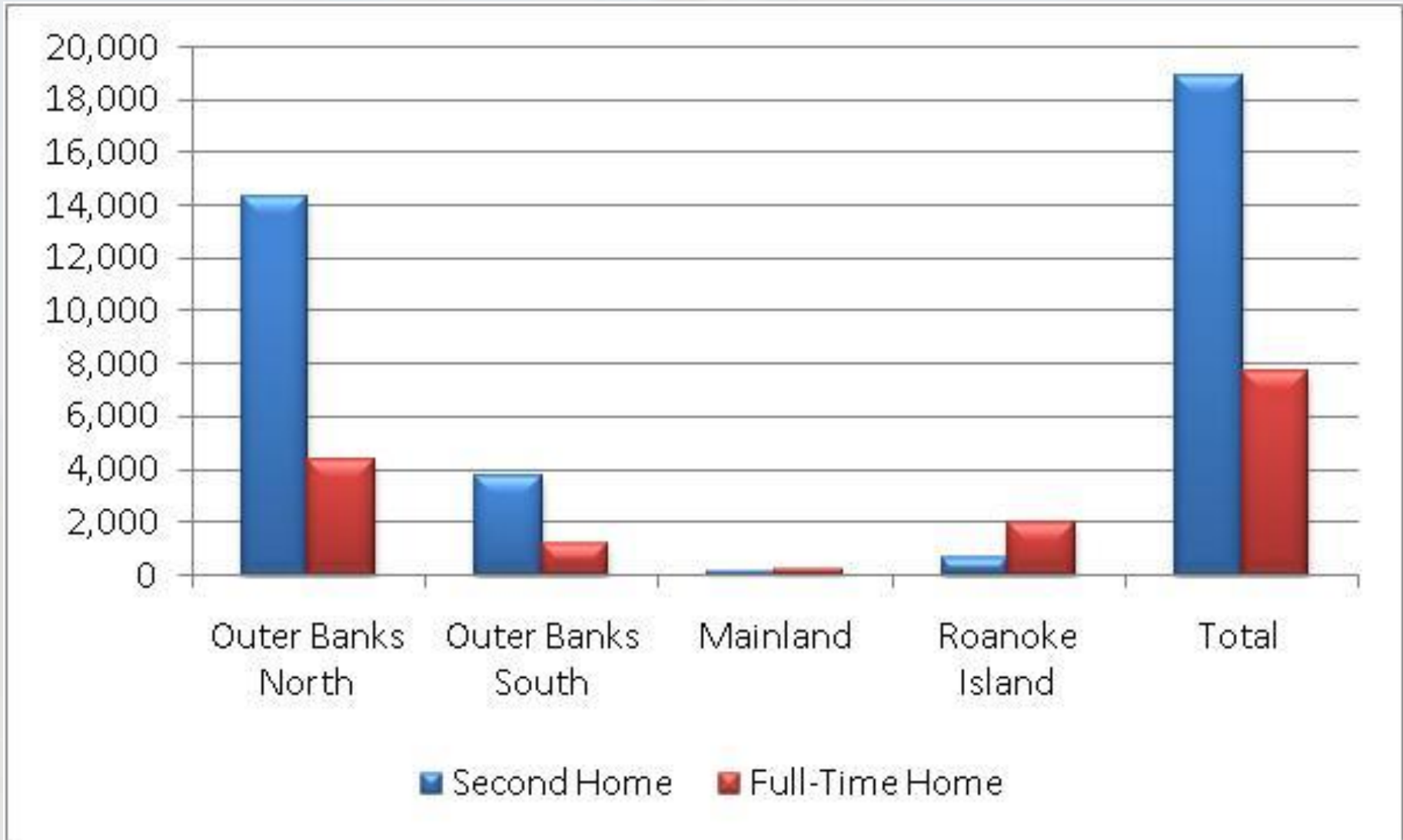
Dare County Survey Area

- Mainland
- Roanoke Island
- Outer Banks North
- Outer Banks South

Dare Population and Housing Estimates



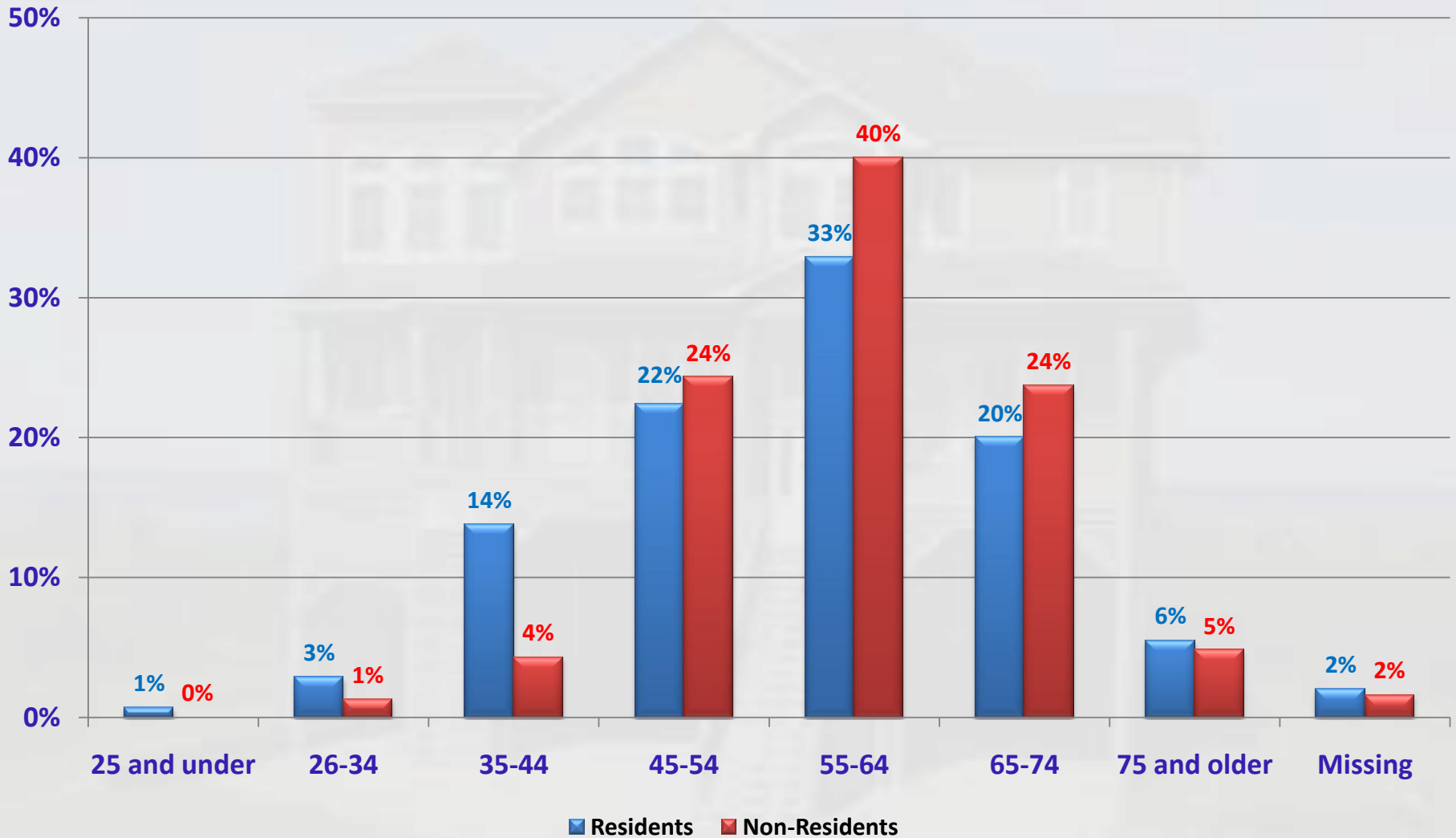
Dare County Property Ownership



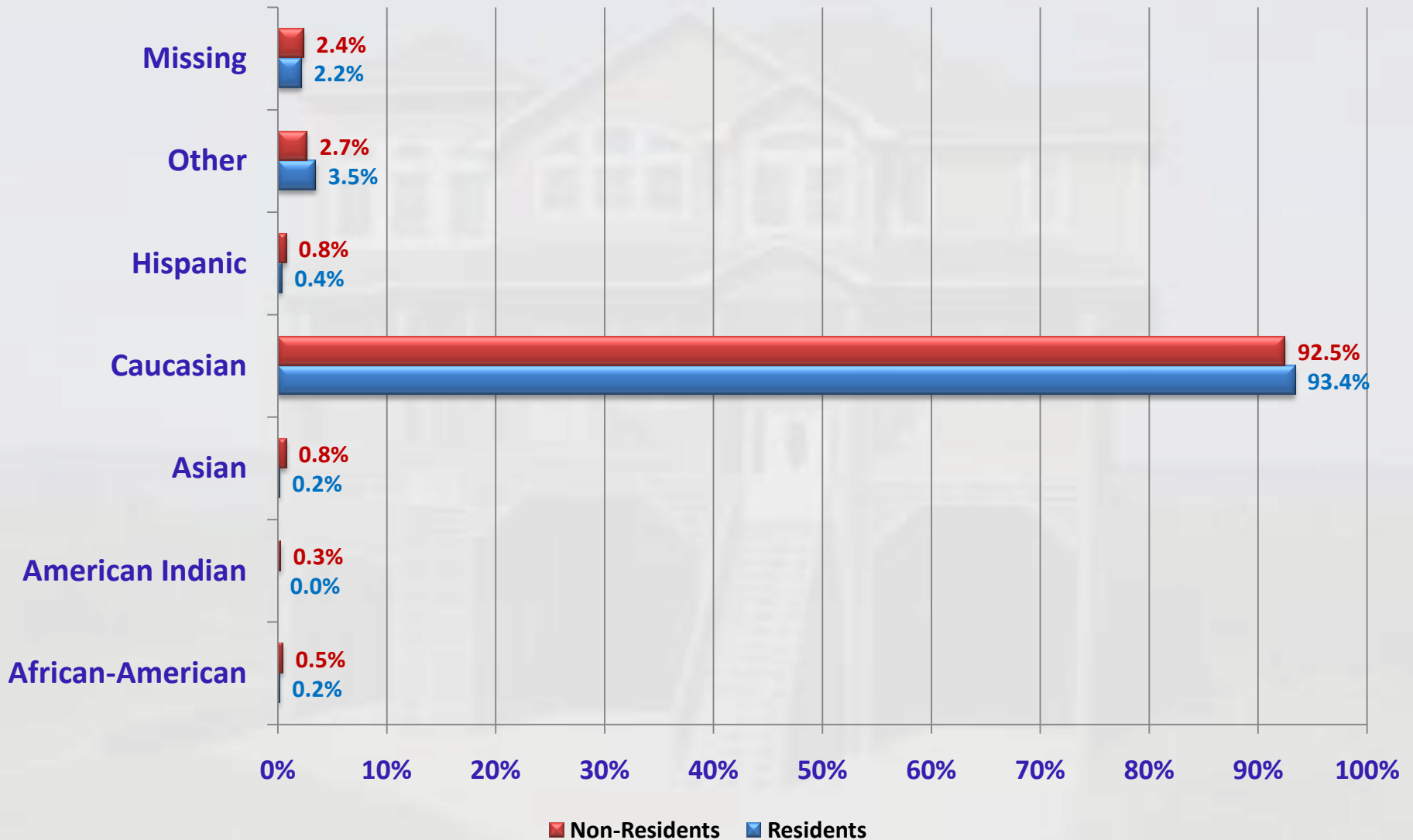
Methodology

- 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)

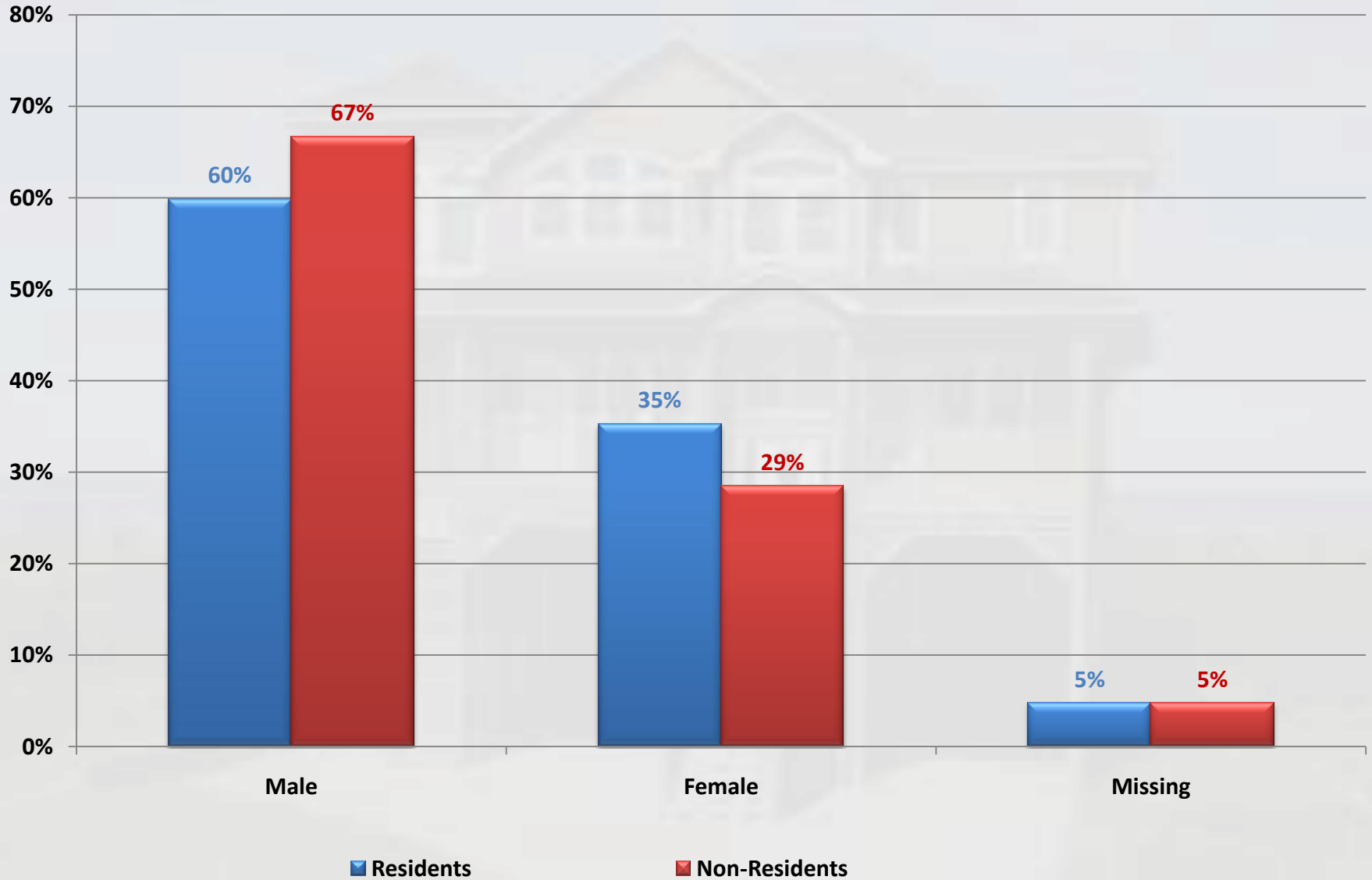
Survey Demographics: Age



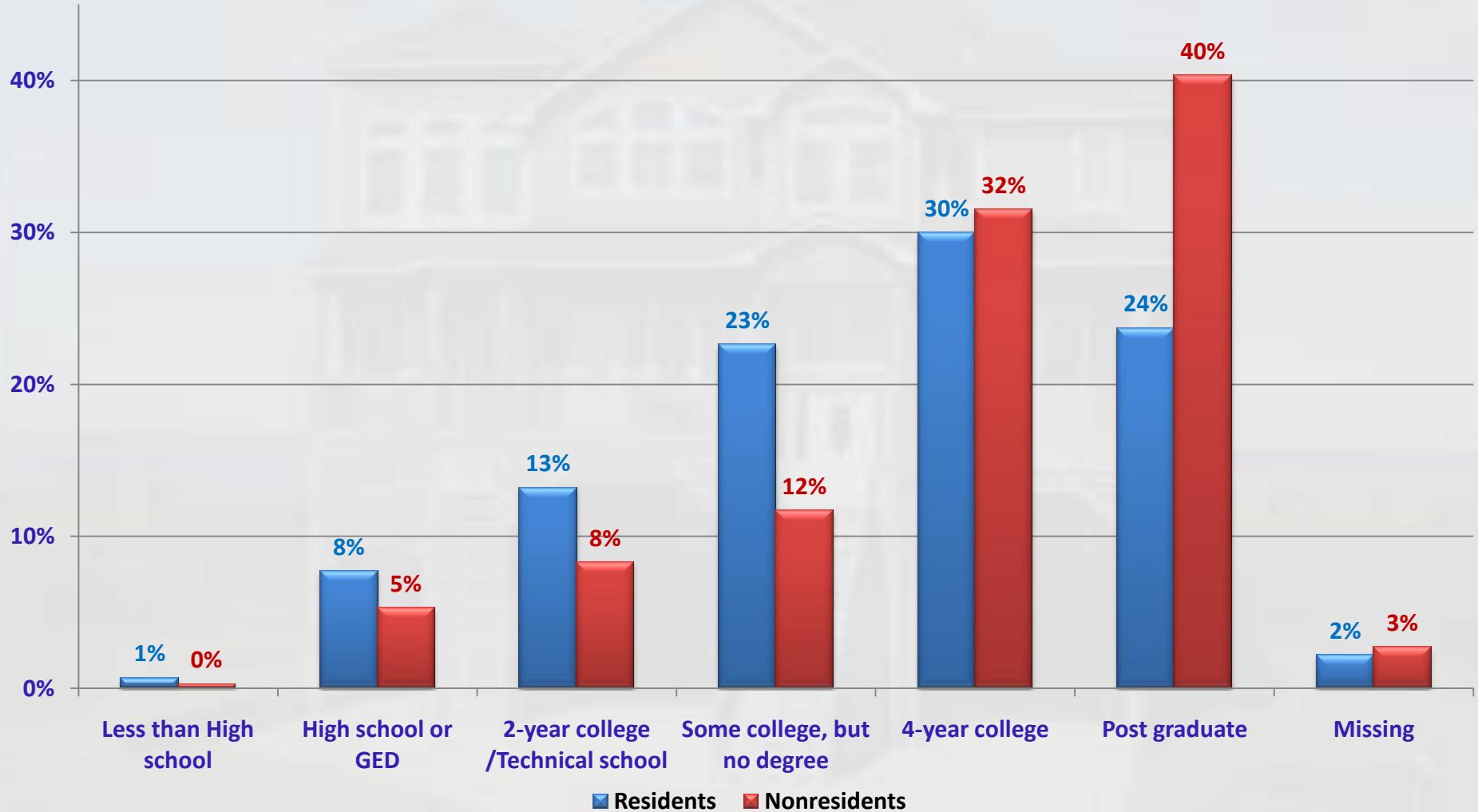
Survey Demographics: Ethnicity



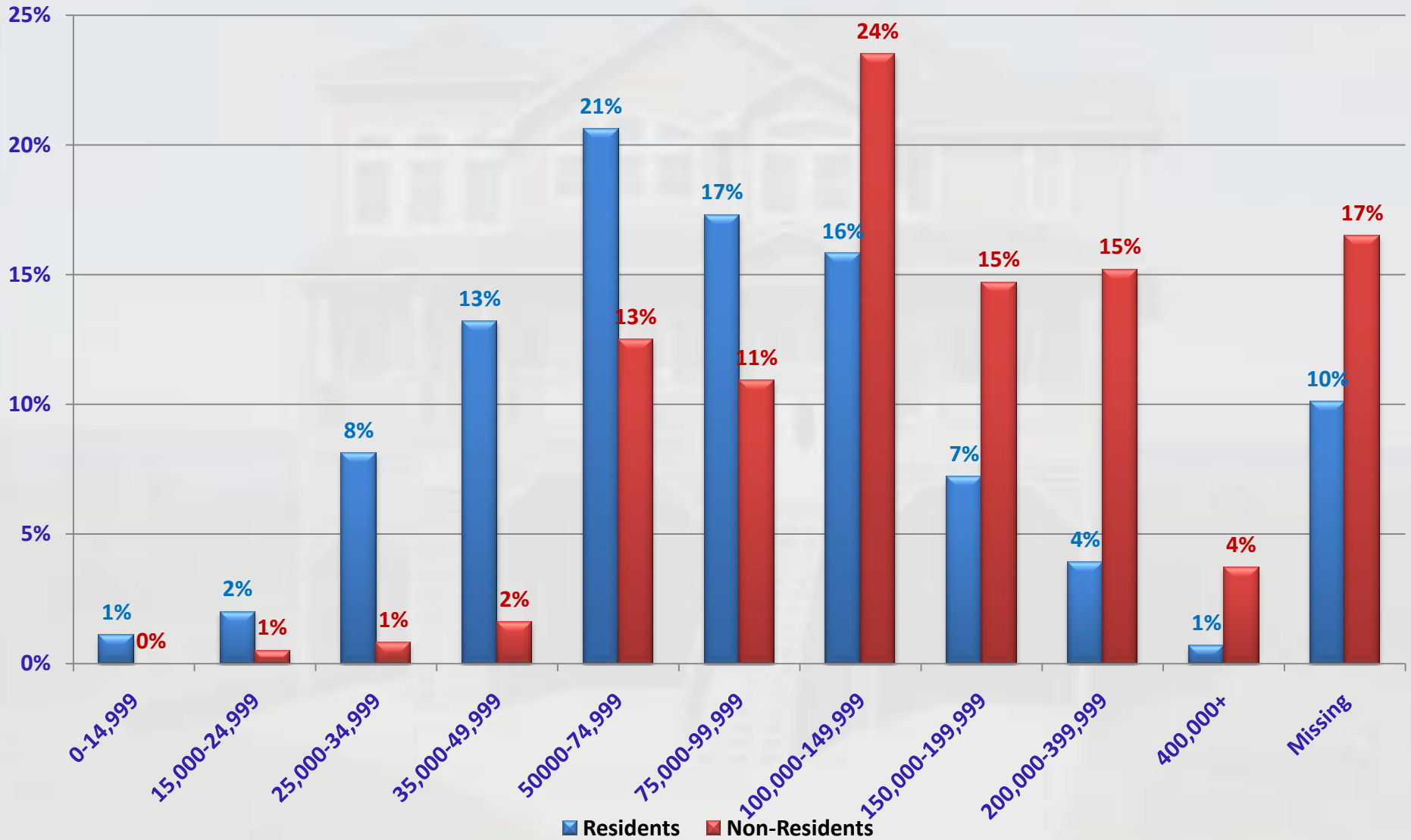
Survey Demographics: Gender



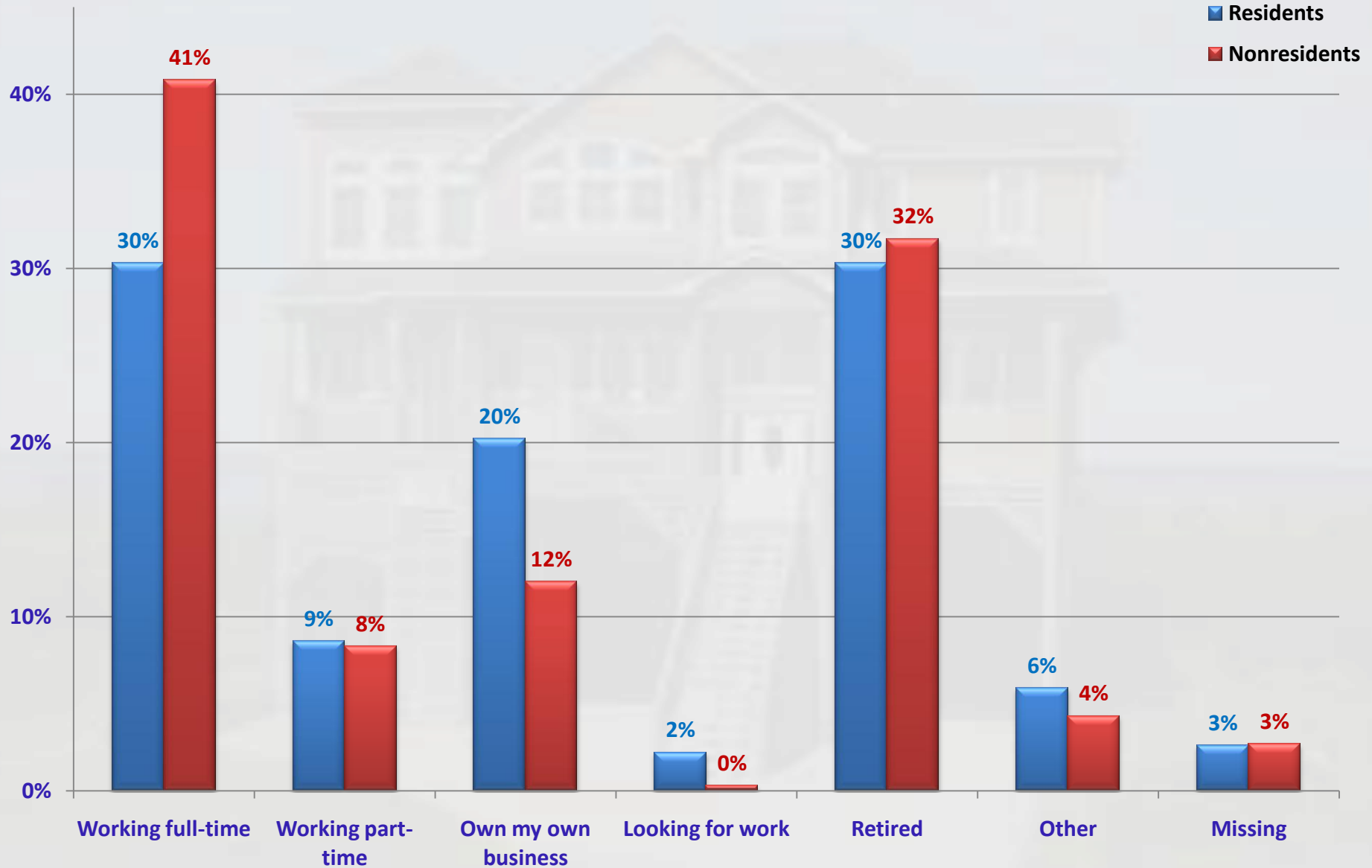
Survey Demographics: Education



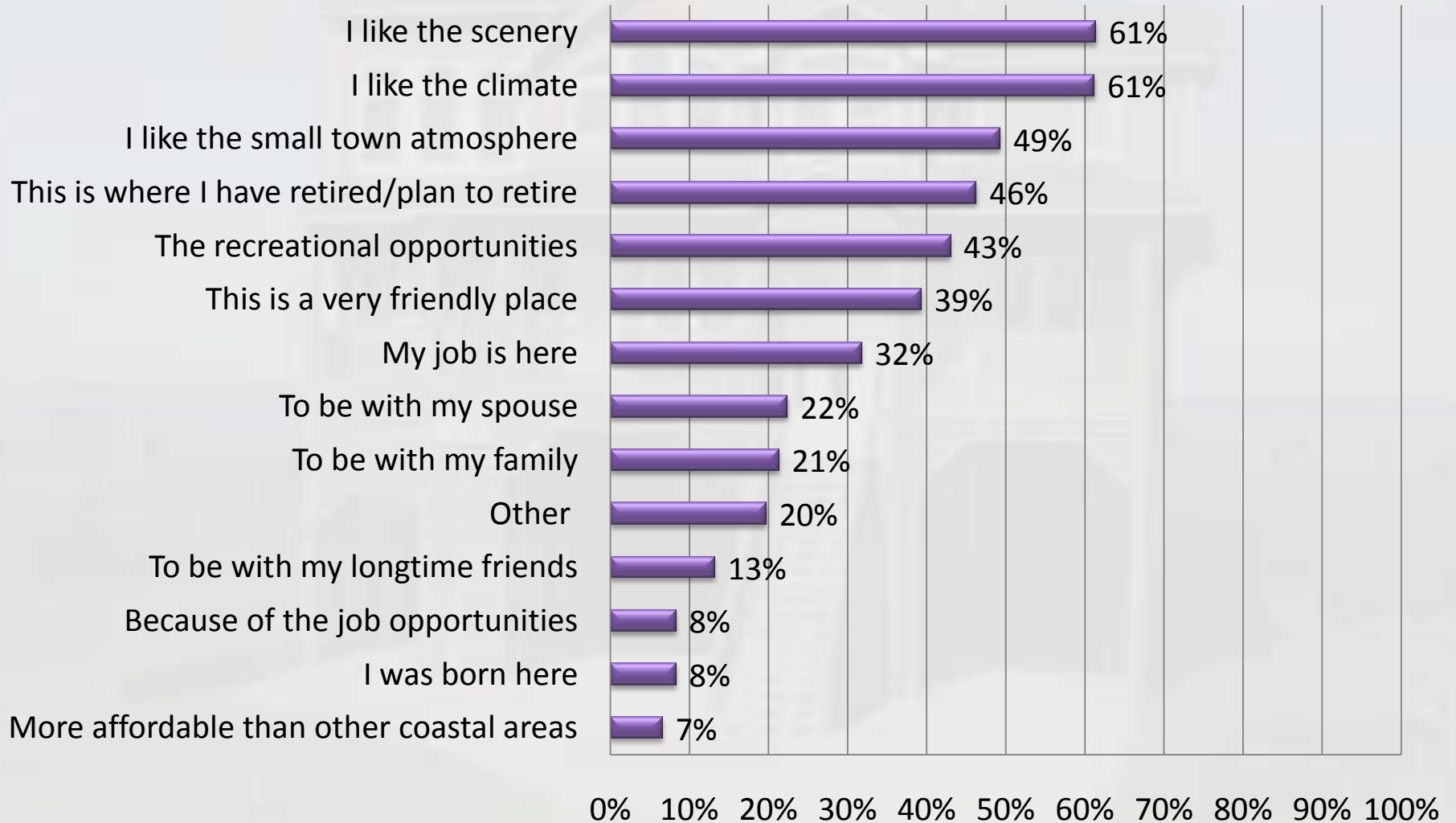
Survey Demographics: Annual Household Income



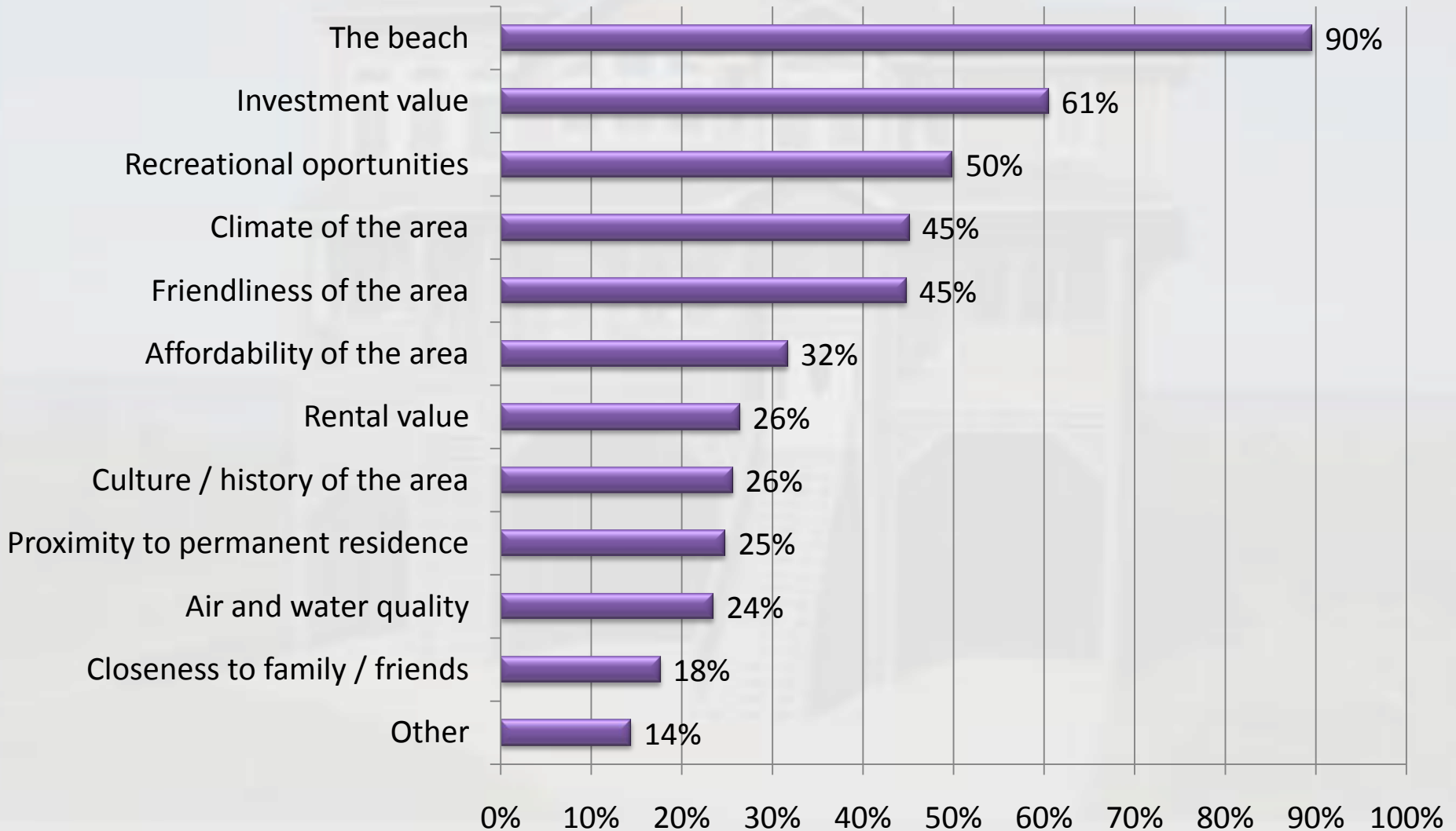
Survey Demographics: Employment Status



Why do you choose to live in Dare County? (Full Time Residents)

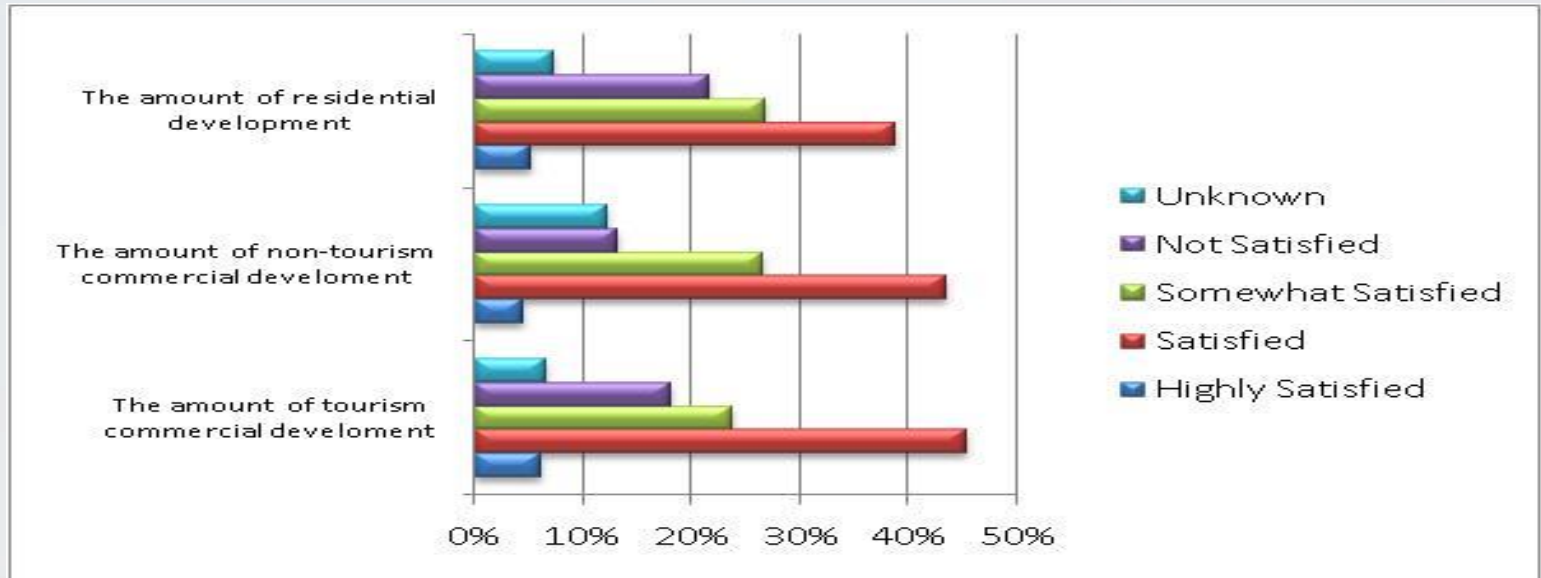


Why did You buy Your Second Home Property in Dare County (Second Home Owners)

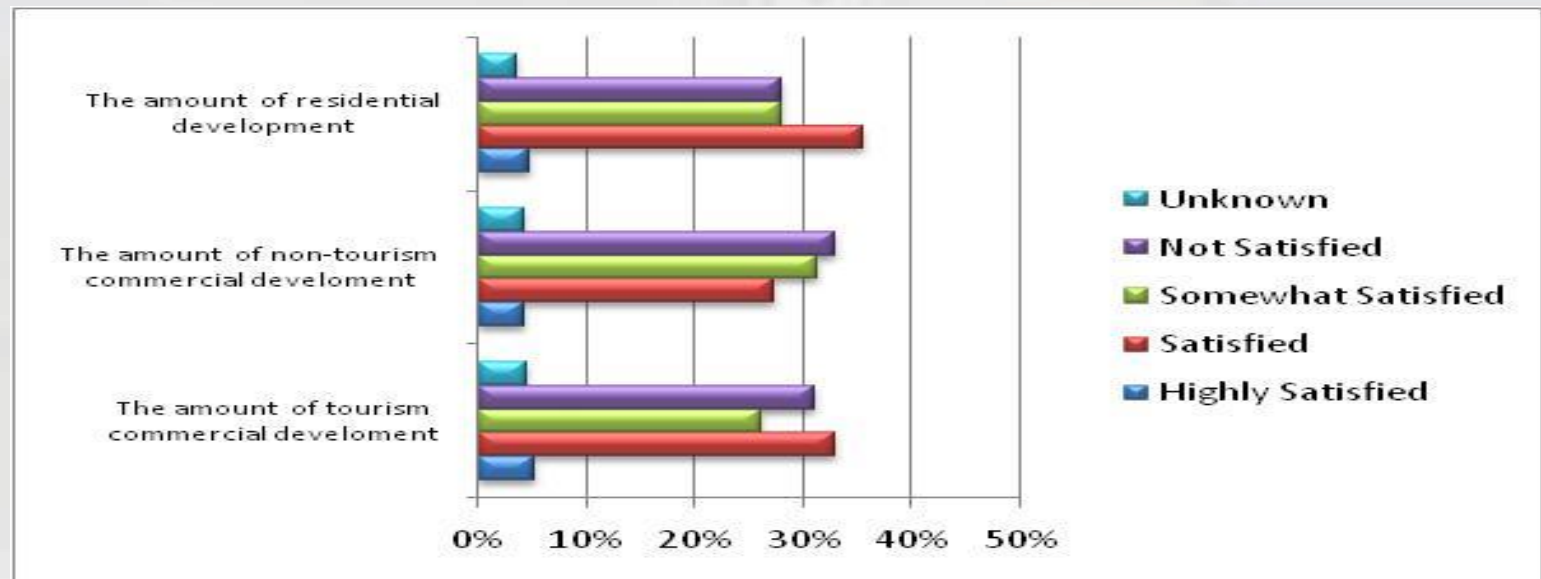


Tourism Development and Land Use

Non-Residents

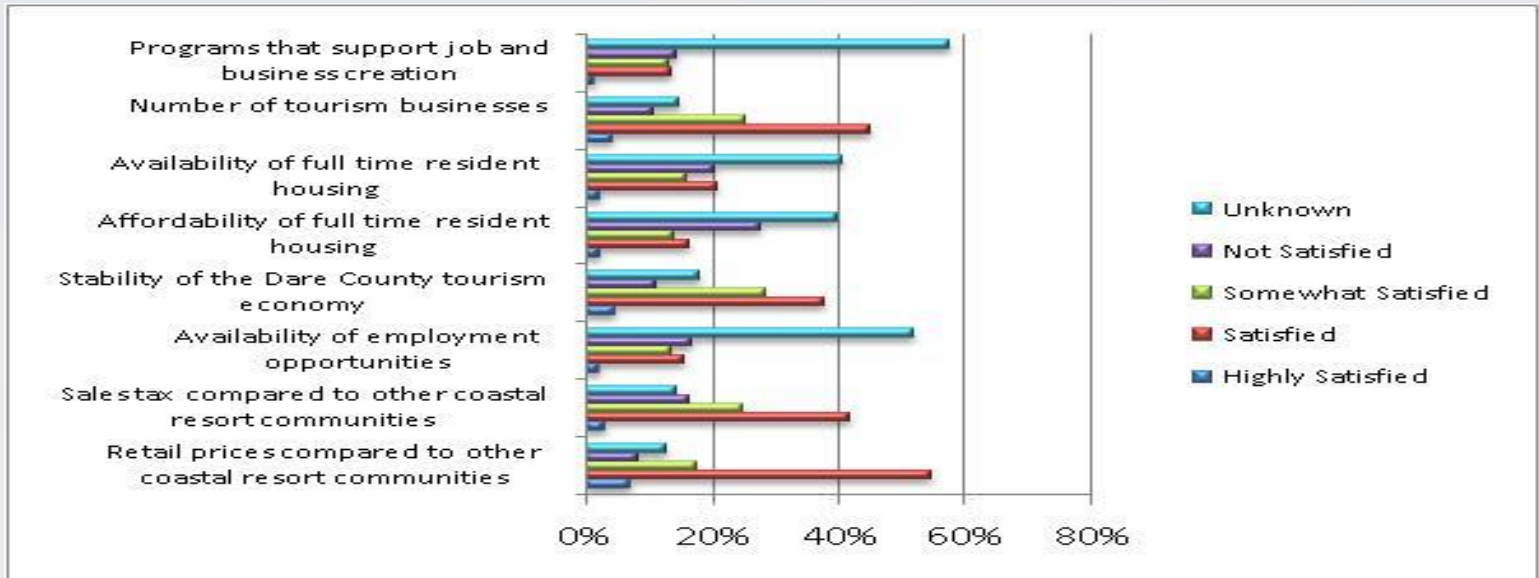


Residents

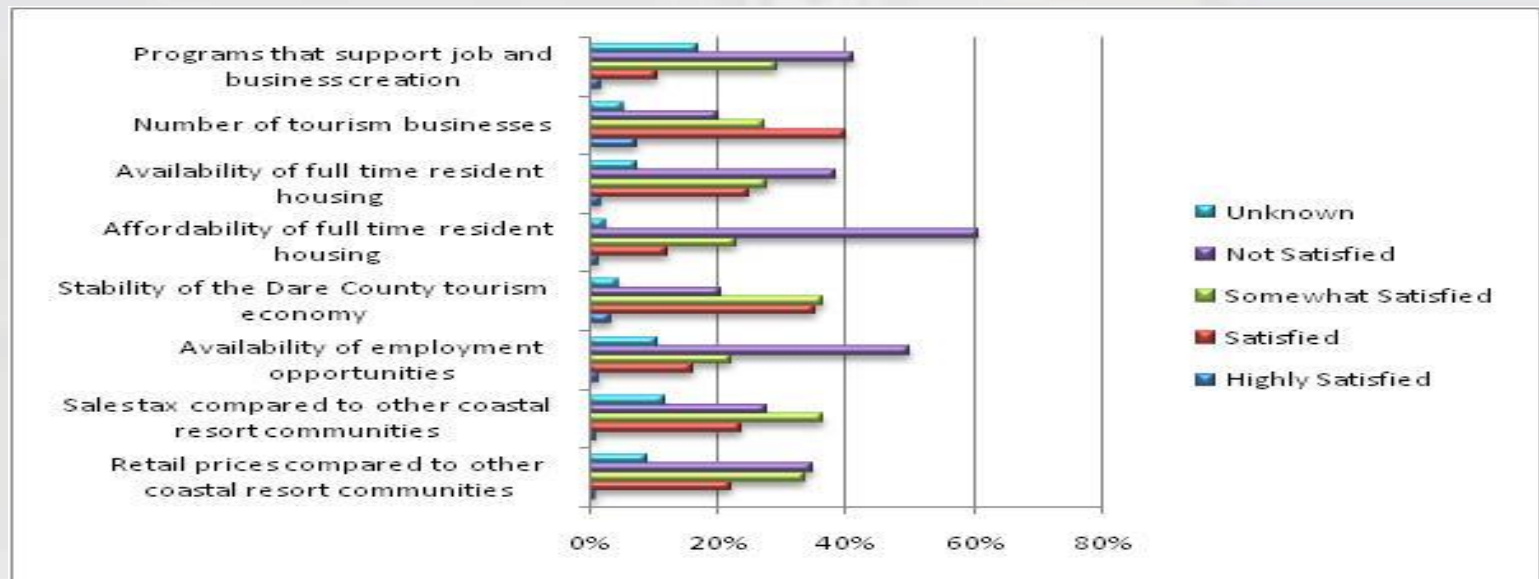


Tourism Development and Economy / Jobs

Non-Residents

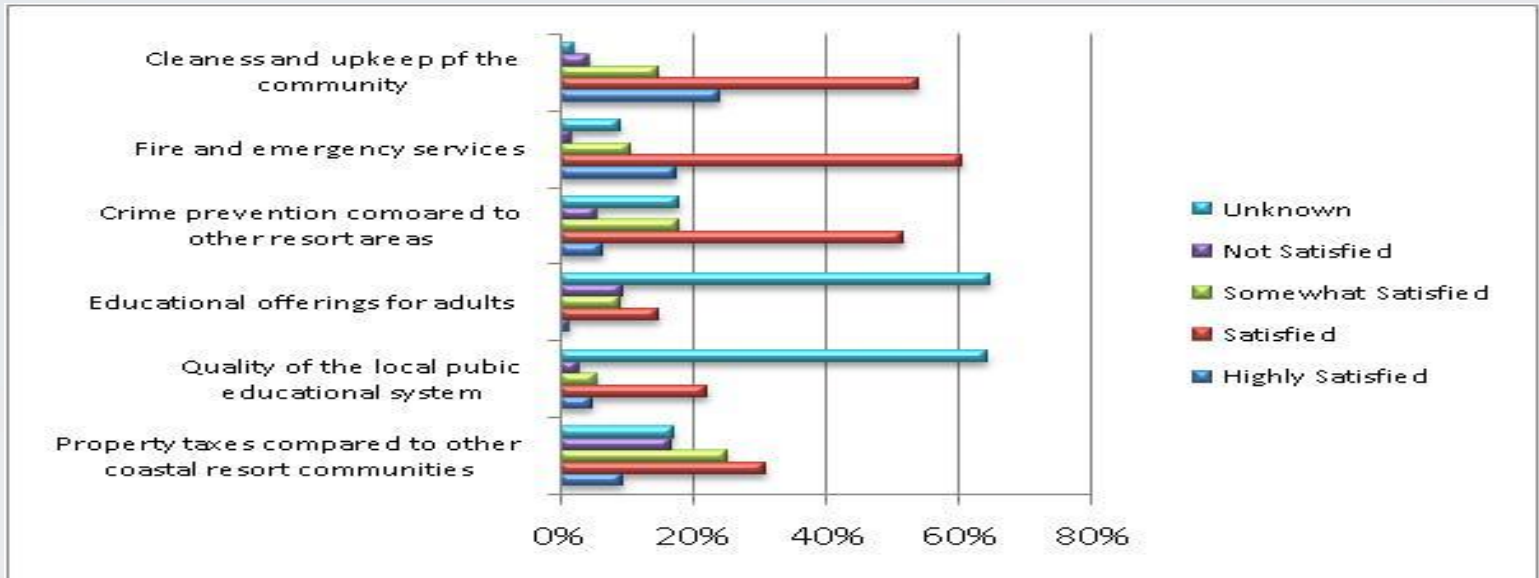


Residents

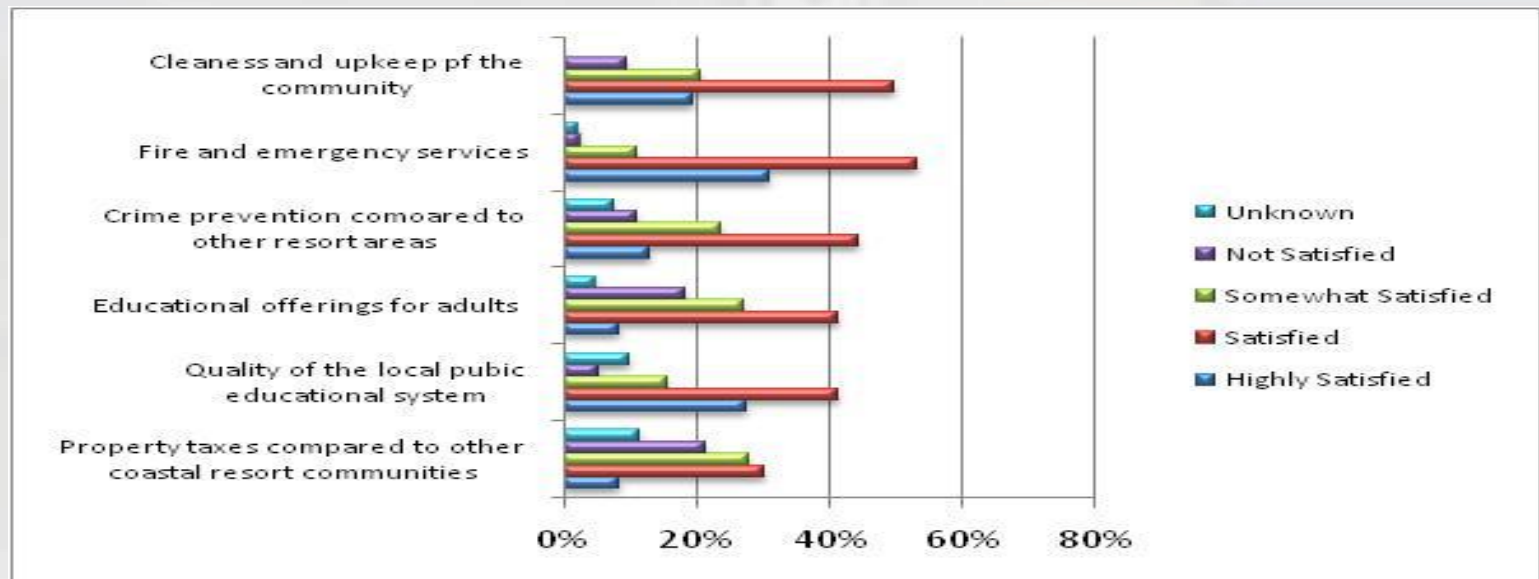


Tourism Development and Government

Non-Residents

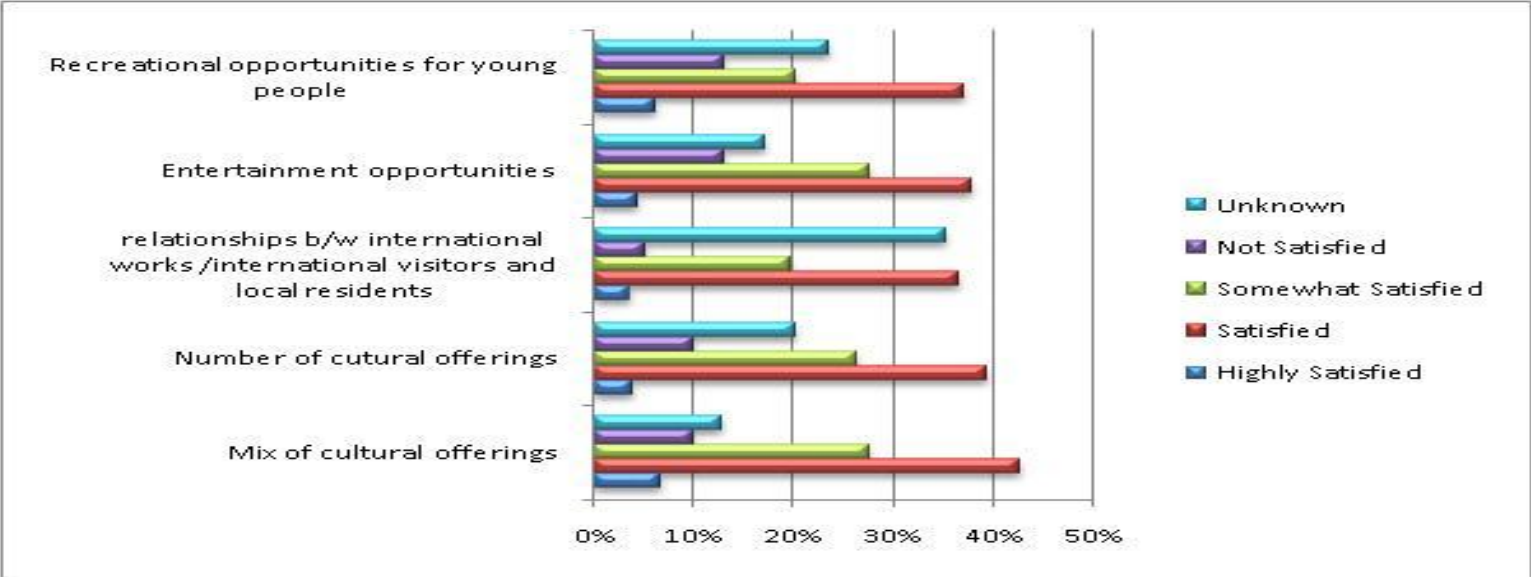


Residents

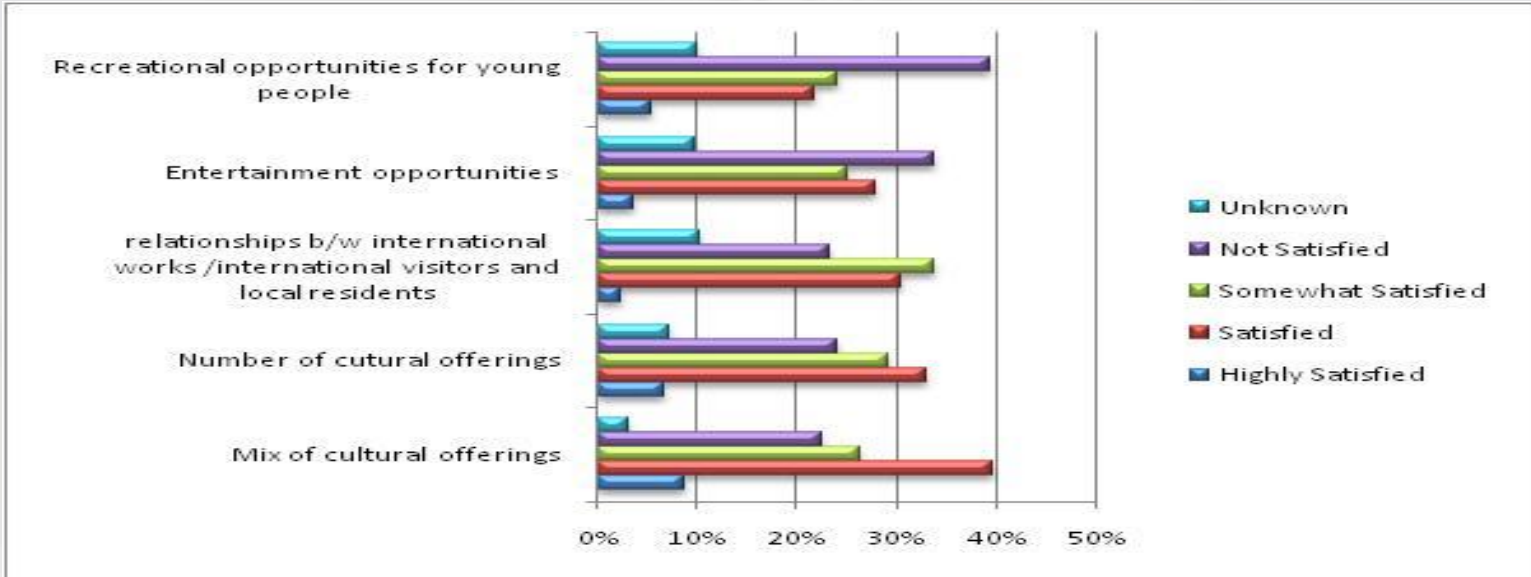


Tourism Development and Cultural Opportunities

Non-Residents

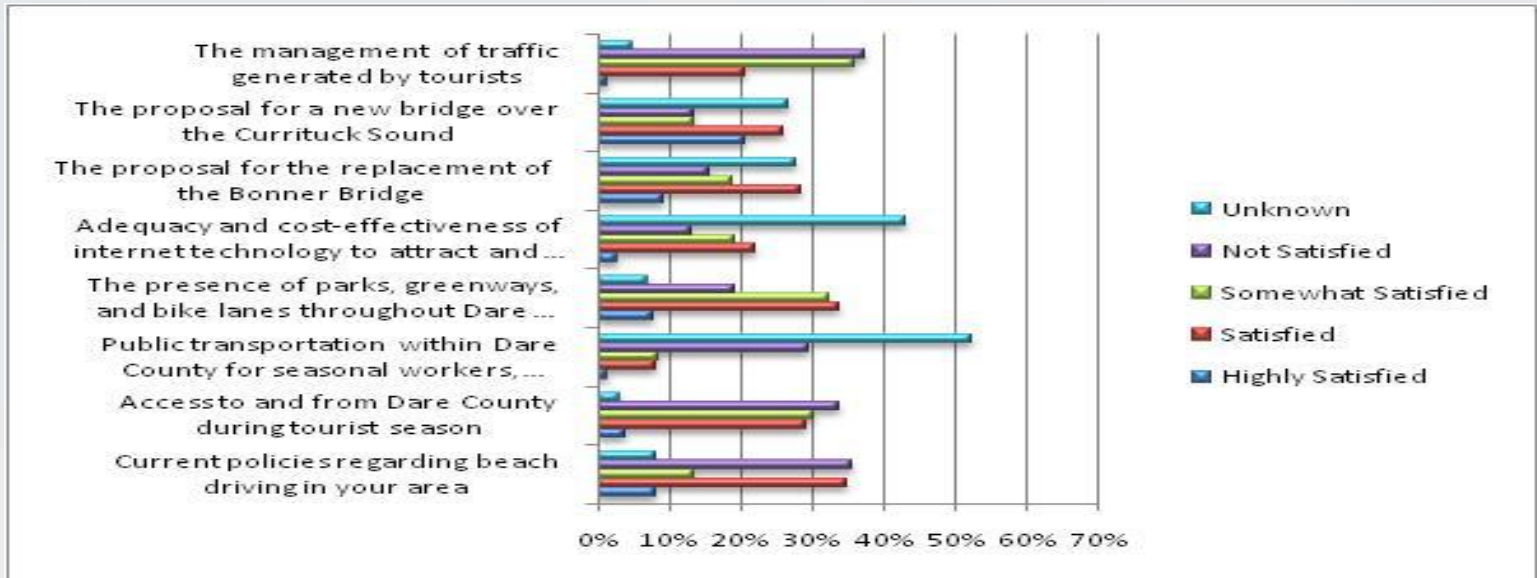


Residents

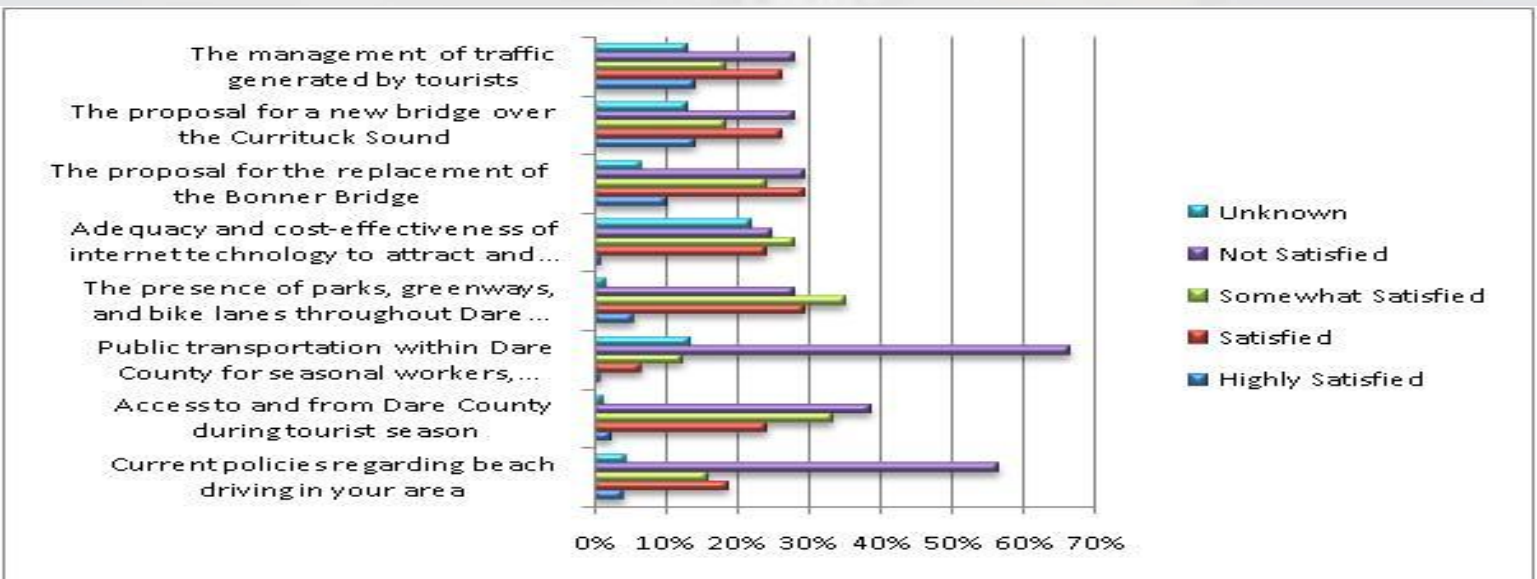


Tourism Development and Infrastructure

Non-Residents

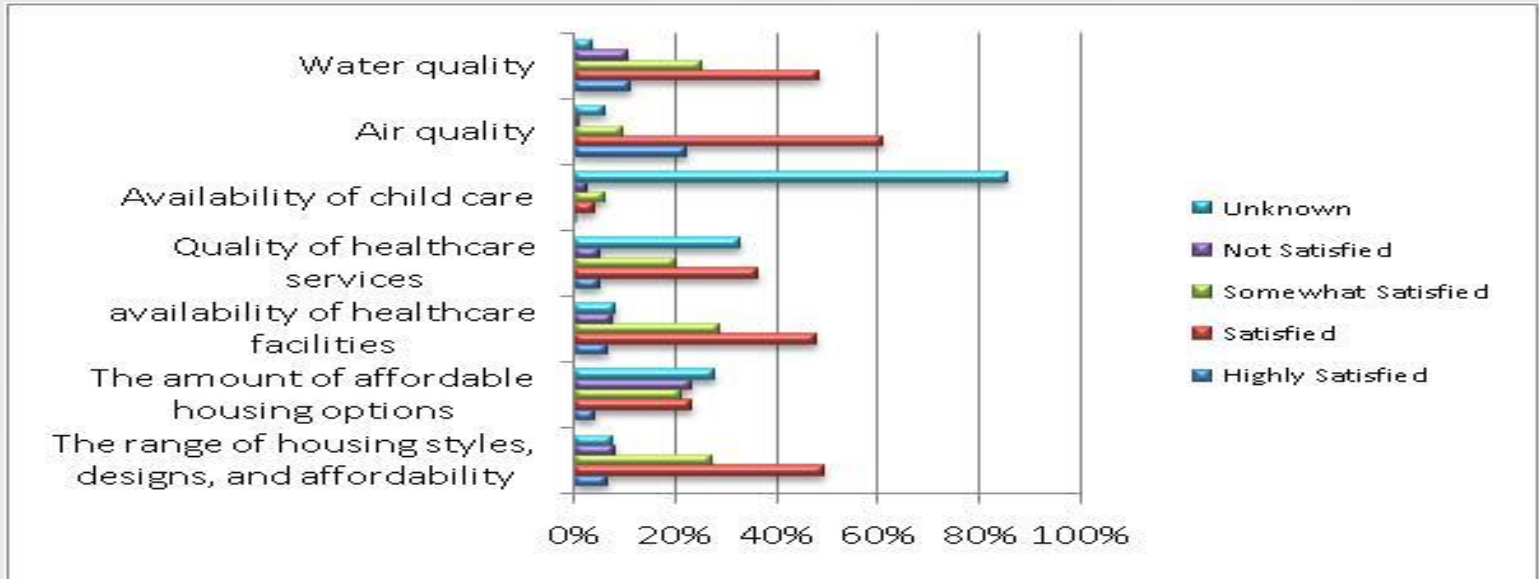


Residents

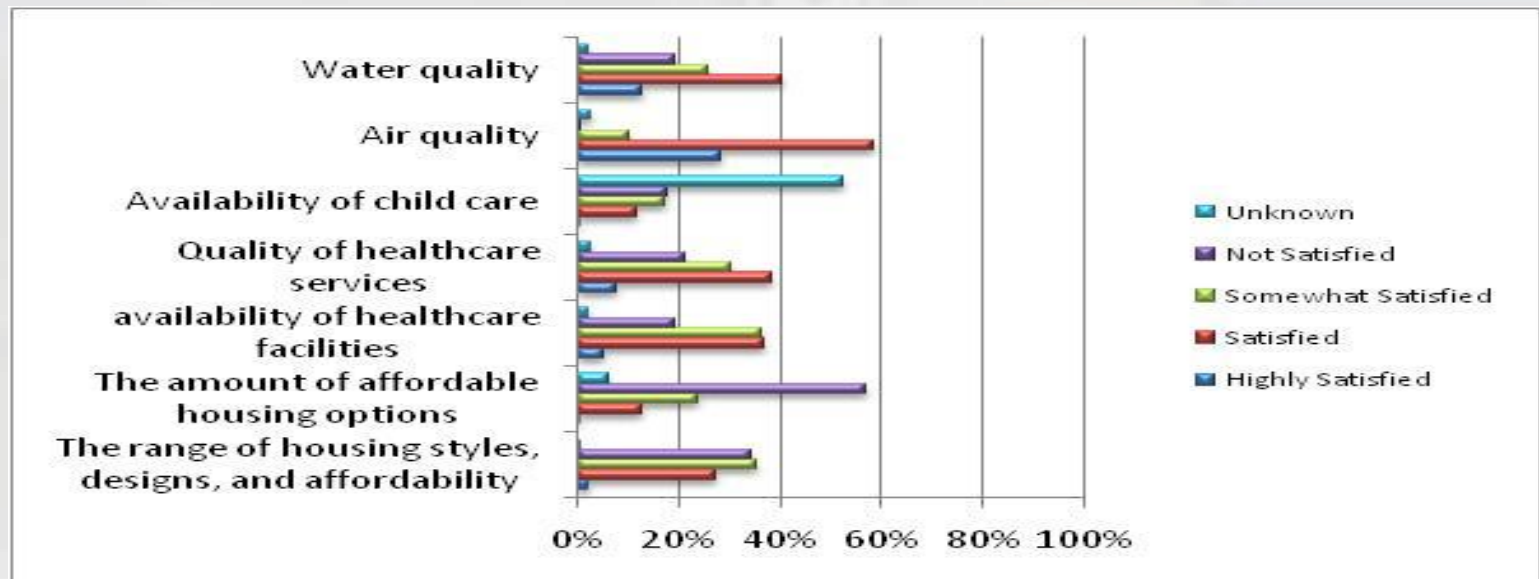


Tourism Development and Quality of Life

Non-Residents



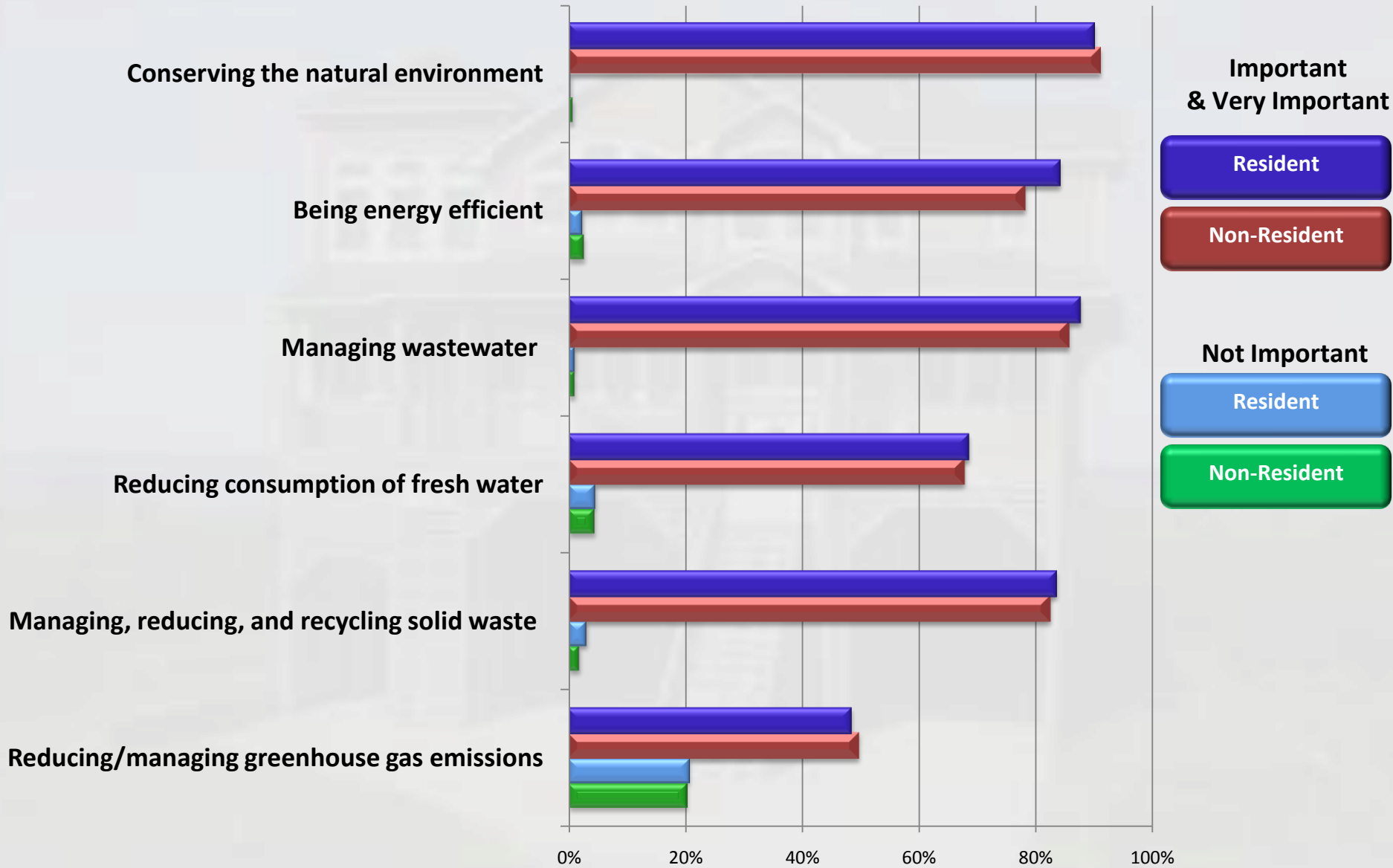
Residents



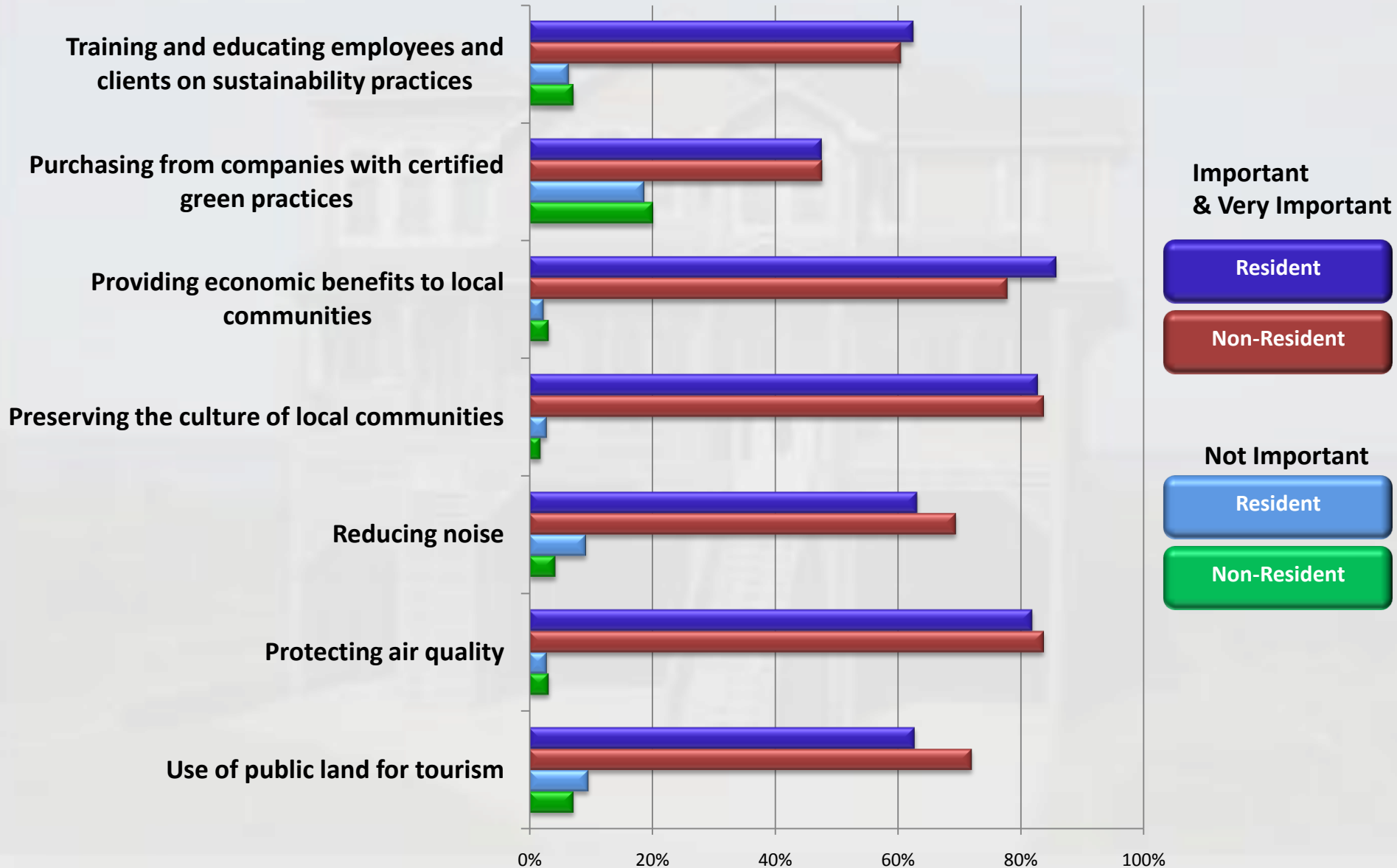
Sustainable Practices

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?



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Summary

Questions & Discussion