

Currituck County, NC

Research Presentation



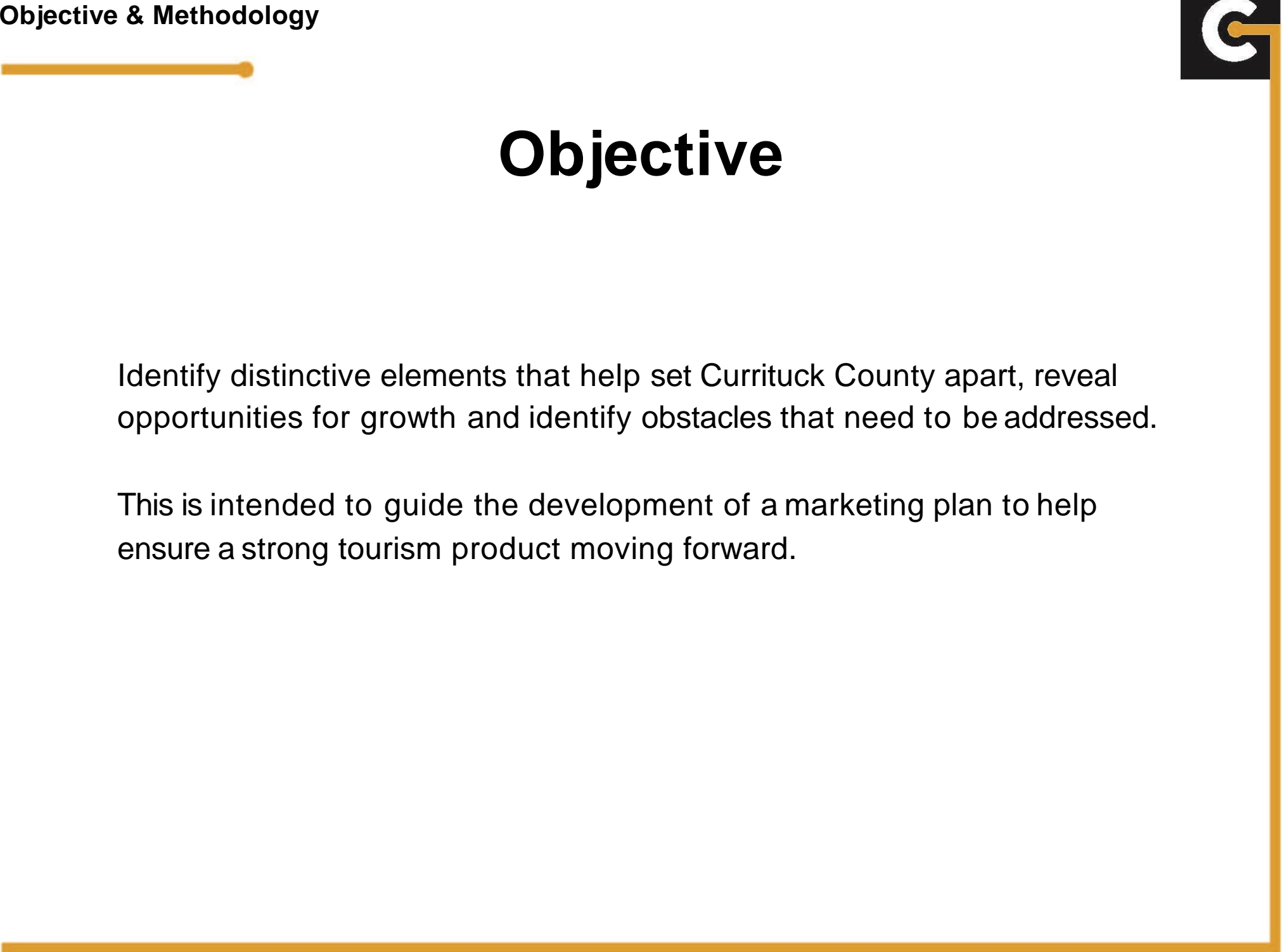
Objective & Methodology



Objective

Identify distinctive elements that help set Currituck County apart, reveal opportunities for growth and identify obstacles that need to be addressed.


This is intended to guide the development of a marketing plan to help ensure a strong tourism product moving forward.





Objective

Specifically, this research investigated:

- Visitation patterns and profiling
 - Tourism asset evaluation, challenges and opportunities
 - Differentiators to competition
 - Tourism priorities and growth potential
 - Evaluation of marketing strategy and implementation
 - Evaluation of organizational/internal challenges
- 




Research Methodology Overview

- A market-visit was completed by the Chandlerthinks team on 7/14/18 to 7/21/18 and 9/30/18 - 10/4/18
 - Tour of Currituck County tourism assets
 - 10 interviews with staff
 - 7 group meetings:
 - 2 Tourism Board
 - 2 Tourism Stakeholders
 - 1 Civic Association
 - 1 Non-Tourism Stakeholders
 - 1 County Commissioners
- Visitor Intercept Surveys completed by 160 guests; conducted at Whalehead, OBX Waterpark and the Visitors Centers



Research Methodology Overview

- Trip planning and conversion study completed by 339 people from the Currituck County tourism inquiry database.
 - A Customer profile study (Tapestry) was done by geocoding approximately 9,000 addresses from the Currituck County tourism inquiry database.
 - Currituck County tourism marketing and digital footprint audit
- 



Local
perceptions of
tourism

Visitor planning

Visitor profiles

Visitor
perceptions
and
performance of
Currituck OBX



Local
perceptions of
tourism



Visiting Currituck Assets

Tourism Fam Tour:

- Aviation Center/airport
 - Carolina Club Golf Course
 - Coinjock Marina
 - Corolla Visitor Center
 - Corolla Wild Horse Tours
 - Currituck Community Park/YMCA
 - Currituck County Rural Center (CCRC)
 - Currituck Welcome Center
 - Currituck Ferry
 - H2OBX Waterpark
 - Hampton Inn & Suites
 - Historic Corolla Park/Lighthouse
 - Historic court house and prison
 - Kilmarlic Golf Course
 - Knott's Island Wildlife Preserve
 - NC Cooperative Extension
 - The Whalehead
 - Various local restaurants
 - Whalehead Wednesdays
 - Weeping Radish Brewery
 - Wildlife Resource Center
- 



Stakeholder Participants

- Brindley Beach Vacations & Sales
- Corolla Civic Association (CCA)
- Corolla Light Resort
- Corolla Wild Horse Fund
- Cox Cable
- Currituck Beach Lighthouse
- Currituck County Fire & EMS
- Currituck County School District
- Currituck Outer Banks, NC
Travel and Tourism
- Farm Bureau Insurance
- H2OBX Waterpark
- Kitty Hawk Kites
- Mel's Diner
- Mutt-N-Jeff's Country Kitchen
- Mustang Music Festival
- Moneysworth Beach Equipment
and Linen Rental
- Ocean Hill Homeowners'
Association
- The Outer Banks Center for
Wildlife Education
- The Whalehead
- Towne Insurance Agency
- TowneBank
- Twiddy Vacation Rentals



Corolla



During the high season occupancy is nearly maxed out.

	HIGH SEASON
Time of Year	Memorial Day - Labor Day (June - Aug.)
Visitor Volume	High
Visitor Origin	NJ, NY, CT, PA, VA, OH, MD, MA, New England, I-95
Visitor Type	Families, family reunions, large parties (14 = avg. group size), multi-generational, affluent, white, 70% repeat visitors
Length of Stay	1 week
Occupancy rate	90%; 50K people/week
Notes	Bad traffic




**There is opportunity to grow the shoulder season
and off season (Dec-March).**

	SHOULDER SEASON
Time of Year	April, May and Sept. - Nov./Thanksgiving
Visitor Volume	Low
Visitor Origin	OH, WV, PA, NC
Visitor Type	Couples, romantic getaways, retirees, ("newlyweds and nearly dead"), families with small kids, home-schoolers
Length of Stay	Weekend getaway
Occupancy rate	
Notes	Spend more per person; fall has highest growth potential



Corolla Tourism Assets

- Wild horses: top attraction
 - Beach: less crowded, warmer
 - Historic Corolla Park
 - Historic sites: Lighthouse, Whalehead
 - The Sound
 - Affordability: more affordable than northern beaches (e.g., Jersey Shore, The Hampton's)
 - Corolla Village
 - Outdoor recreation: biking, kayaking, surfing, etc.
 - Restaurants
 - Retail: mom & pop stores
 - Southern Hospitality
- 



Among Outer Banks destinations, Corolla is believed to be the most affluent.

- Corolla: affluent
- Duck: affluent
- Kitty Hawk: medium cost
- Kill Devil Hills: medium cost
- Nags Head: medium cost
- Hatteras: cheapest





Corolla is said to be the newest, most pristine and most upscale beach destination of the Outer Banks.

What makes Corolla
different than other
OBX locations?

Very new
Different design
Common areas
No neon signs
Most family-oriented
No night life
More space and nature
Better beaches
Cleaner
Finer sand no trenches
Less crime
More exclusive and upscale
Off the beaten path
Wild horses
Quiet-Peaceful
House rentals



The Mainland



Mainland Tourism Assets

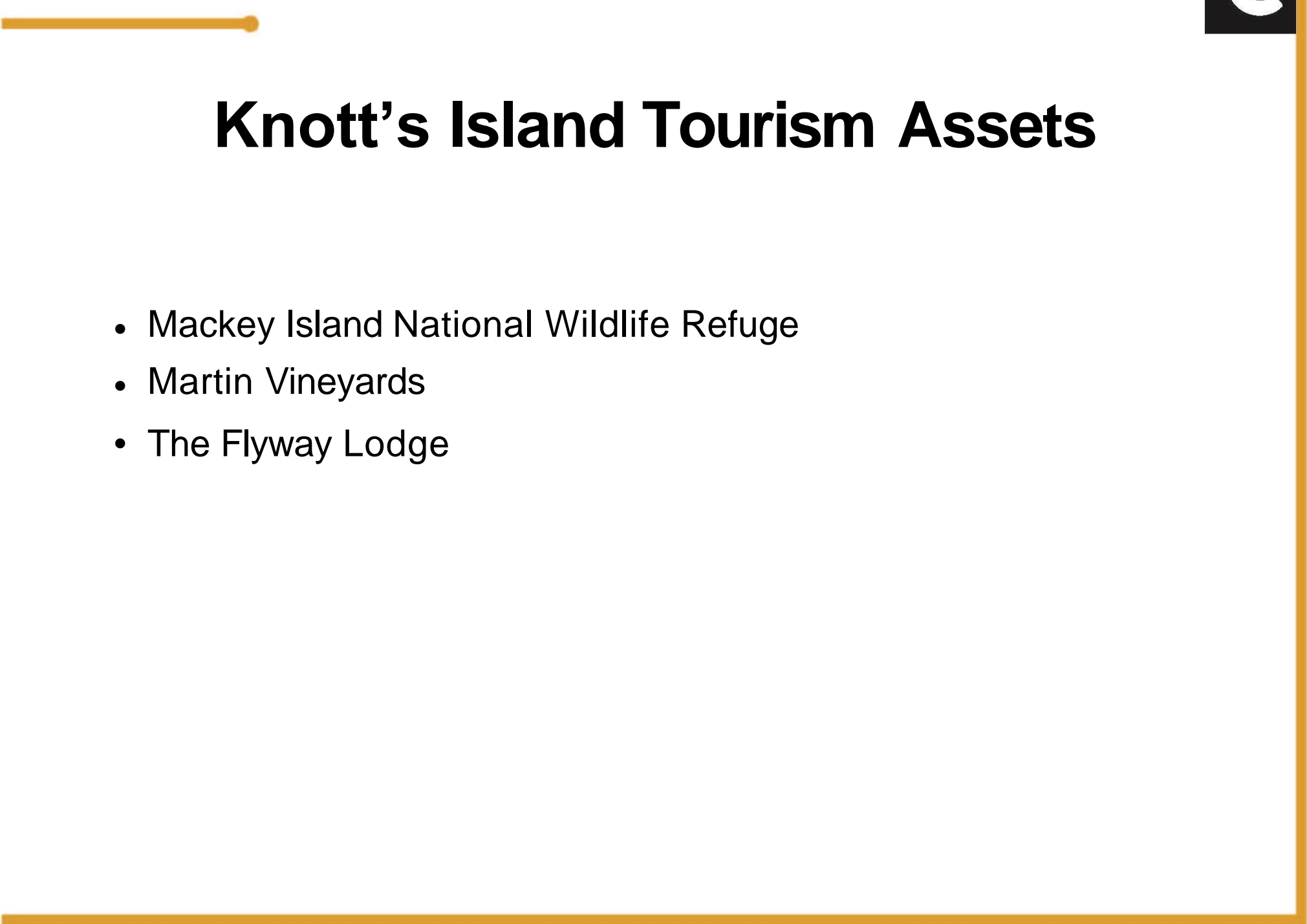
- 3 golf courses
- Ball fields and parks
- Border Station/Welcome Center
- Cotton Gin
- Currituck County Rural Center (CCRC)
- Farmers Markets
- Currituck Ferry
- Frog Island Seafood
- Grave Digger
- H2OBX Waterpark
- Historic Jarvisburg Colored School Museum
- Kitty Hawk Kites
- Sanctuary Vineyards
- The Sound
- Weeping Radish Farm Brewery

Highway 158






Knott's Island Tourism Assets

- Mackey Island National Wildlife Refuge
 - Martin Vineyards
 - The Flyway Lodge
- 



Currently, the Mainland's role in generating tourism remains mostly untapped.

What role does the Mainland play for tourism?

- Labor force for Corolla
 - Administration
 - Businesses along the highway
 - Intracoastal waterway
- 



The Mainland presents many great opportunities for tourism growth.

- Future lodging properties
- Eco-tourism/water sports along the Sound:
 - Mainland has more access points vs. Corolla (1)
 - 3 campgrounds (Bells Island, Hampton Lodge, Knott's Island)
- Youth sports
- Golf: 5 golf courses vs. 1 in Corolla
- Hunting & fishing
- CCRC: equestrian and other events
- Intracoastal waterway: could add a marina
- Create revenue from non-beach attractions: outlet mall, theme park, etc.
- Affordable housing for tourism labor force: add apartments/condos
- The bridge



Current Tourism Issues:

A desire for business in all seasons

- Increase tourism during shoulder season, especially in the fall

Expand tourism beyond the beach:

- Mainland
- The Currituck Sound

Keeping business in Currituck & attracting more Dare County tourists to Currituck businesses

- Preserve the product
- Create more opportunities to spend money off the beach

Infrastructure:

- Solving traffic issues: turning lanes, 2nd bridge addition
- Improving/extending bike lanes
- Lighting



Tourism Challenges

- **Beach:** local perceptions of overcrowding and off-road risks
- **Lodging:** dominated by large houses and large groups that are hard on local resources
- **Traffic:** in Corolla limited space and high safety risks; 158-corridor (Currituck Hwy) needs aesthetic improvements
- **Mainland:** current visitors unwilling to go back for activities
- **Weather:** limited activities/attractions for rainy days; Nature is uncontrollable
- **Preservation:** Maintaining unspoiled character both on the beach side and the Sound/Mainland side
- **Mainland vs. beach** mentality erodes trusts; Beach perceived as elite and hard to get to due to tourism traffic and Mainland are the locals, voters and decision makers
- **Staffing:** staff is seasonal; shoulder season lacks sufficient staff; housing is too expensive
- **Changing visitor** and vacation patterns: Current mix is getting older; Opportunity to grow the shoulder season with new visitor
- **Public access** points to the Sound is limited (especially from Corolla)
- **Limited name recognition:** Visitors know they're in the Outer Banks. They know Corolla. Not aware of Currituck.
- **Visitors often stay inside:** Restaurants/attractions cannot accommodate extremely large crowds - people stay at houses instead of frequenting businesses

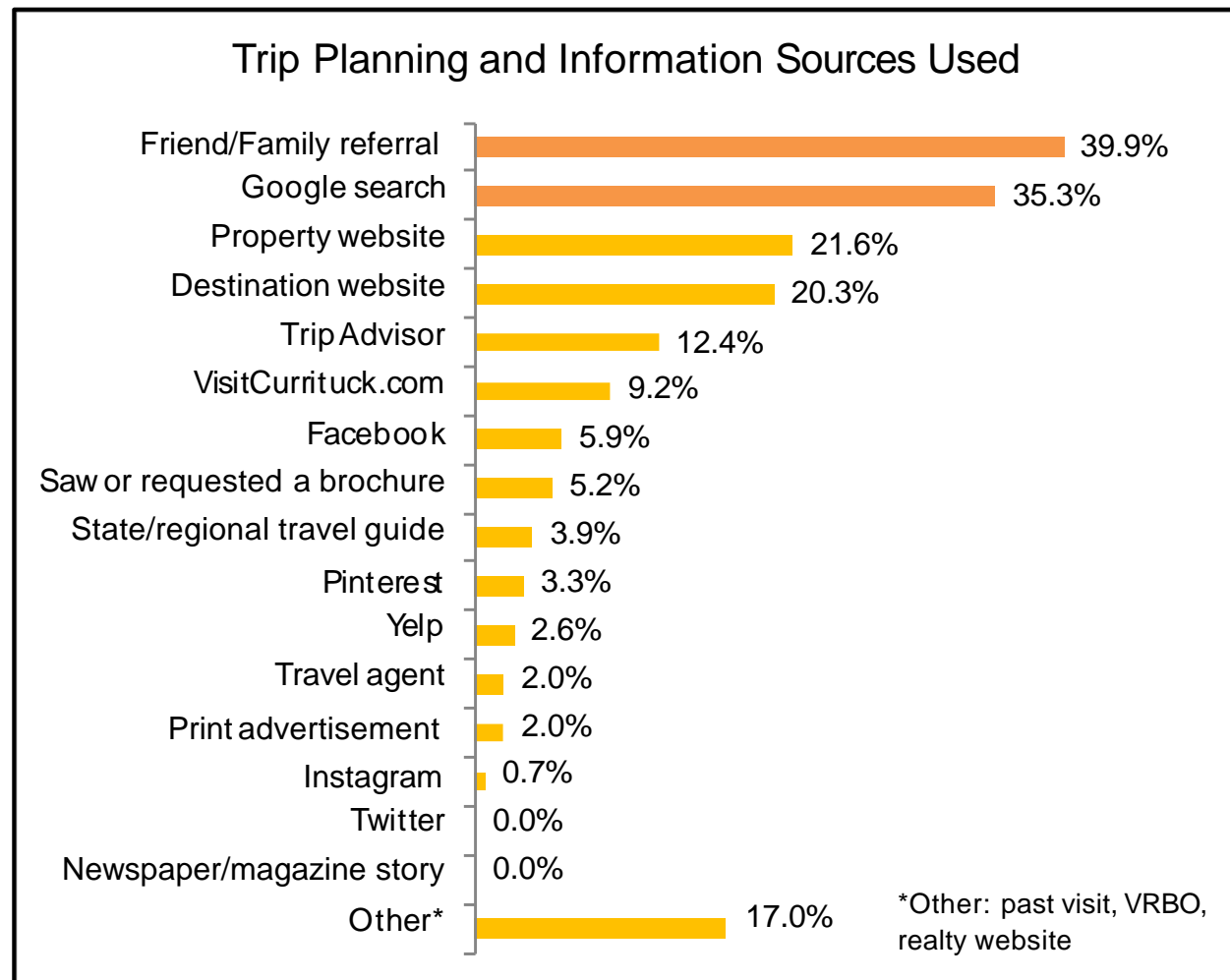


Visitor planning



Visitors mainly planned their trip to the Outer Banks based on referrals and Google searches.

Q: What trip planning and information sources did you use to plan this trip?





Keyword Searches

currituck		1600	knotts island		2400
currituck nc		2900	mackay island		320
currituck county		5400	wright brothers memorial		3600
currituck county nc		880	nc sand dunes		720
dare county		5400	outer banks sand dunes		720
corolla nc		27100	outer banks wild horses		2900
duck nc		22200	corolla wild horses		2400
nags head		27100	nc wild horses		5400
nags head nc		33100	north carolina wild horses		5400
outer banks		135000	currituck wild horses		70
h2obx waterpark		1000	wilmington nc		246000
outer banks water park		1600	kill devil hills		18100
currituck water park		70	kitty hawk		60500
currituck sound		720	roanoke island		22200
corova nc		1000	hatteras		14800



Keyword Searches

cape lookout	<div></div> 12100
ocracoke	<div></div> 14800
cape hatteras lighthouse	<div></div> 14800
currituck lighthouse	<div></div> 2400
bodie lighthouse	<div></div> 1900
ocracoke island lighthouse	<div></div> 210
whalehead	<div></div> 320
gravedigger	<div></div> 90500
grave digger	<div></div> 90500
things to do in outer banks	<div></div> 5400
things to do in corolla nc	<div></div> 1600
weeping radish	<div></div> 2400
nc breweries	<div></div> 5400

nc hang gliding	<div></div> 390
hang gliding	<div></div> 90500
kitty hawk kites	<div></div> 5400
virginia beach	<div></div> 301000
myrtle beach	<div></div> 673000
colonial williamsburg	<div></div> 74000
jamestown	<div></div> 201000
norfolk	<div></div> 201000
outer banks hotels	<div></div> 40500
outer banks places to stay	<div></div> 880
outer banks lodging	<div></div> 720
outer banks homes	<div></div> 170
outer banks rental	<div></div> 40500
outer banks cottage	<div></div> 260
corolla rental	<div></div> 1000



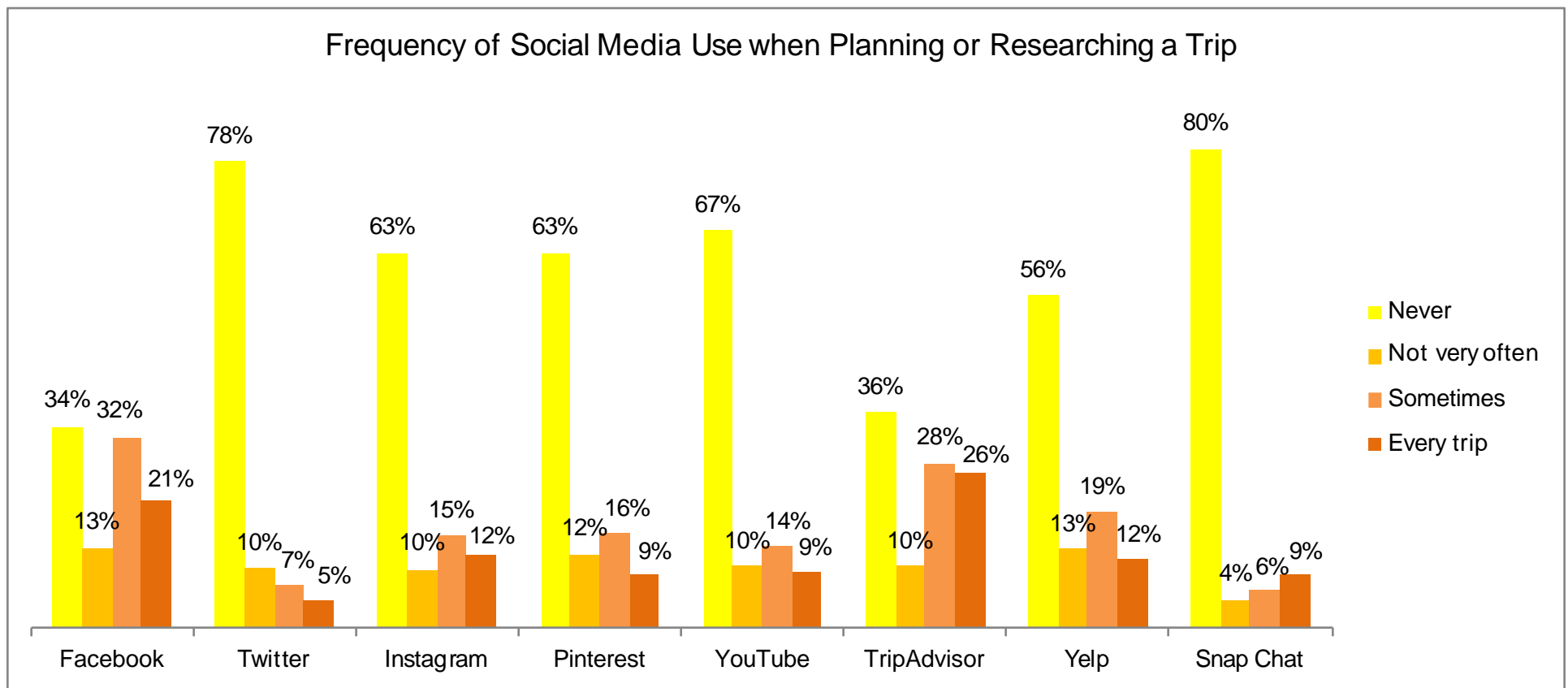
Keyword Searches Observations

- Corolla is a popular search and more popular search than Currituck County.
- Outer Banks popularity is significantly larger than any one destination in the Outer Banks.
- Wild horses are searched, especially as North Carolina Wild Horses
- Cape Hatteras Lighthouse is the most popular followed by Currituck Lighthouse.
- Grave Digger is wildly popular. A worldwide brand.
- “Things to do in outer banks” is common.
- Searches for “Outer Banks hotels” and “Outer Banks rentals” are significant.



Visitors use Facebook and TripAdvisor when researching or planning a trip, but rarely any other social media.

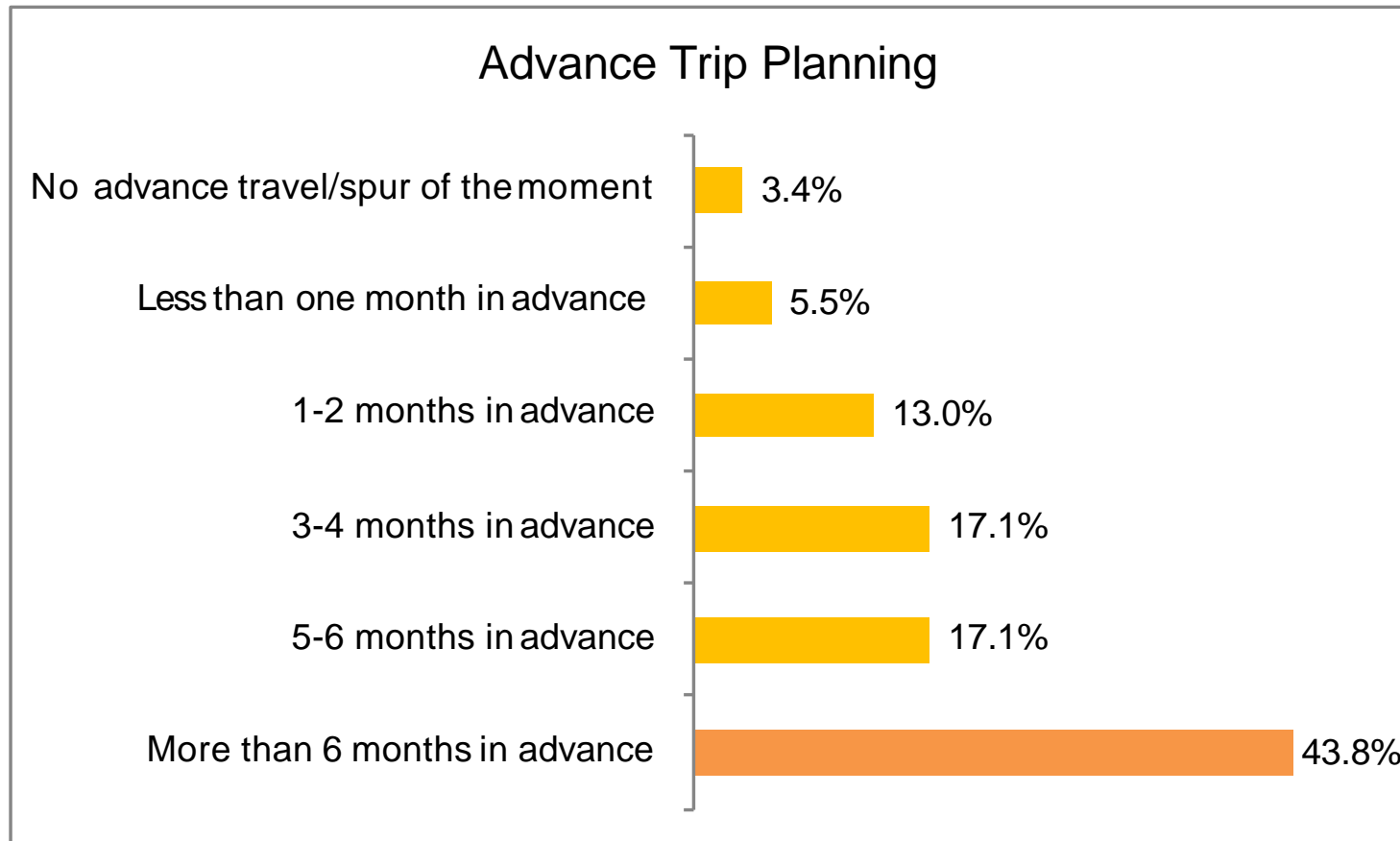
Q: How often do you use the following social media when planning or researching a trip?





Visitors mostly planned their trip to Currituck Outer Banks six or more months in advance.

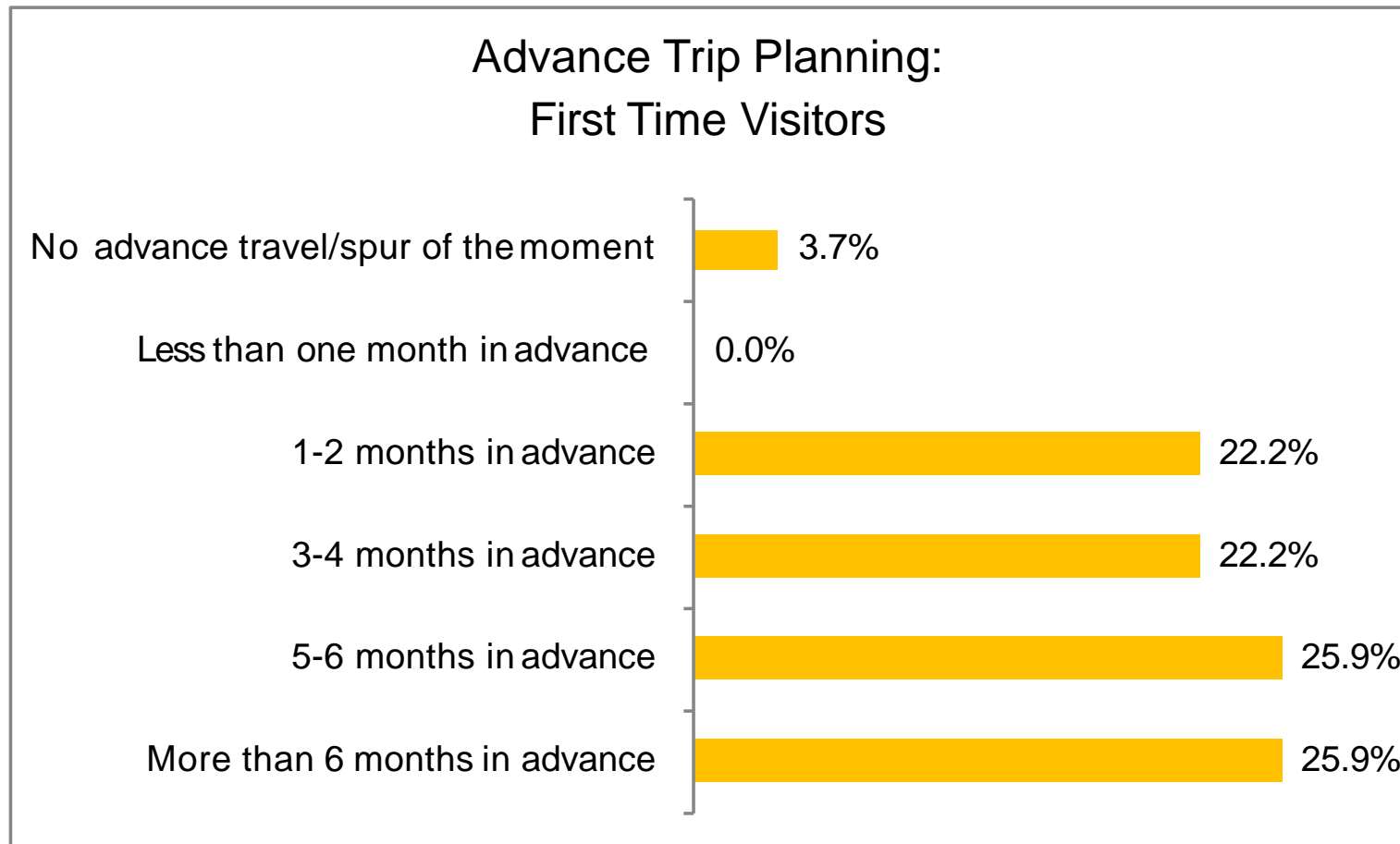
Q: How far in advance did you plan your trip to Currituck Outer Banks?





First time visitors have more varied time frames and shorter planning windows.

Q: First time visitors: How far in advance did you plan your trip to Currituck Outer Banks?





Visitor profiles



Top 20 States

Name	(A)	Count	Percent
North Carolina (37)		1,844	5.07
Virginia (51)		1,817	5.00
Pennsylvania (42)		1,407	3.87
Ohio (39)		694	1.91
New York (36)		575	1.58
Maryland (24)		415	1.14
New Jersey (34)		331	0.91
West Virginia (54)		330	0.91
South Carolina (45)		252	0.69
Georgia (13)		163	0.45
Tennessee (47)		162	0.45
Kentucky (21)		141	0.39
Florida (12)		119	0.33
Massachusetts (25)		119	0.33
Michigan (26)		110	0.30
Indiana (18)		100	0.28
Connecticut (09)		98	0.27
Illinois (17)		94	0.26
Delaware (10)		66	0.18
Texas (48)		51	0.14



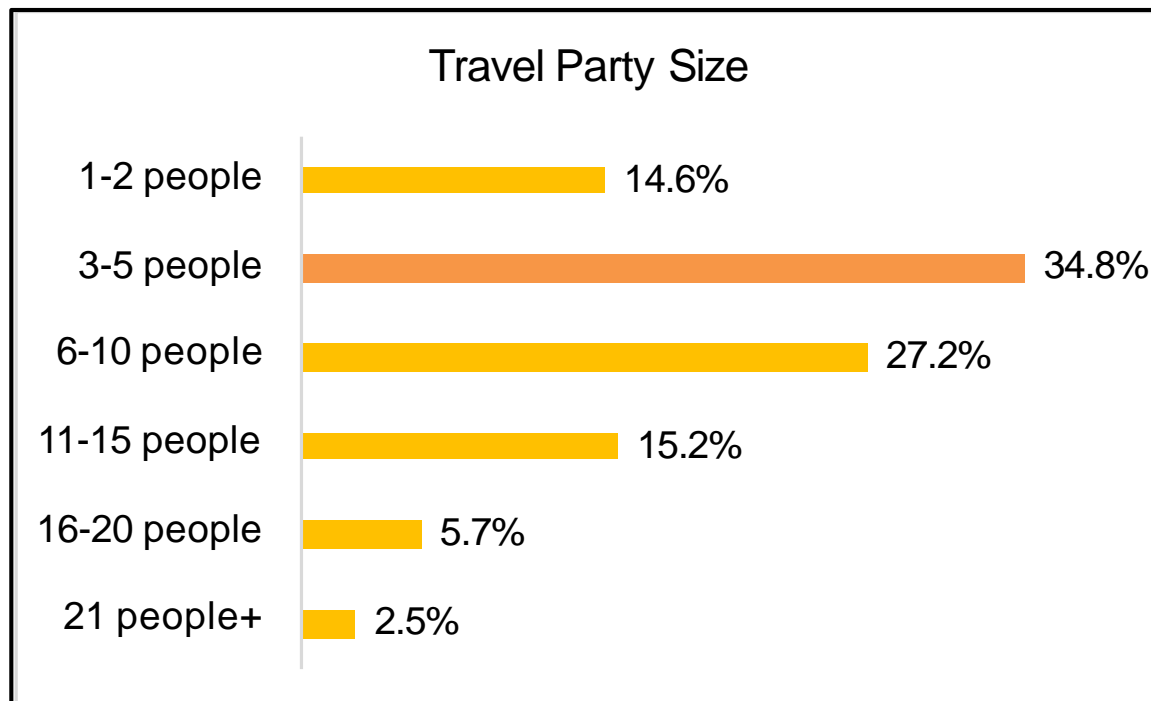
Top 20 CBSAs

Name	(F)	Count	Percent
Virginia Beach-Norfolk-Newport News, VA-NC Metropolitan Statistical Area (47260)		530	1.46
Washington-Arlington-Alexandria, DC-VA-MD-WV Metropolitan Statistical Area (47900)		402	1.11
Pittsburgh, PA Metropolitan Statistical Area (38300)		368	1.01
Richmond, VA Metropolitan Statistical Area (40060)		366	1.01
Philadelphia-Camden-Wilmington, PA-NJ-DE-MD Metropolitan Statistical Area (37980)		361	0.99
New York-Newark-Jersey City, NY-NJ-PA Metropolitan Statistical Area (35620)		349	0.96
Charlotte-Concord-Gastonia, NC-SC Metropolitan Statistical Area (16740)		274	0.75
Raleigh, NC Metropolitan Statistical Area (39580)		204	0.56
Baltimore-Columbia-Towson, MD Metropolitan Statistical Area (12580)		189	0.52
Winston-Salem, NC Metropolitan Statistical Area (49180)		183	0.50
Greensboro-High Point, NC Metropolitan Statistical Area (24660)		133	0.37
Cleveland-Elyria, OH Metropolitan Statistical Area (17460)		104	0.29
Columbus, OH Metropolitan Statistical Area (18140)		102	0.28
Roanoke, VA Metropolitan Statistical Area (40220)		99	0.27
Hickory-Lenoir-Morganton, NC Metropolitan Statistical Area (25860)		95	0.26
Lynchburg, VA Metropolitan Statistical Area (31340)		90	0.25
Allentown-Bethlehem-Easton, PA-NJ Metropolitan Statistical Area (10900)		83	0.23
Atlanta-Sandy Springs-Roswell, GA Metropolitan Statistical Area (12060)		79	0.22
Cincinnati, OH-KY-IN Metropolitan Statistical Area (17140)		78	0.21
Harrisburg-Carlisle, PA Metropolitan Statistical Area (25420)		76	0.21



**One-third of visitors arrived with smaller families (3-5 people).
But the average party size was rather large at 8 people.**

Q: Including yourself, how many people are in your travel party?

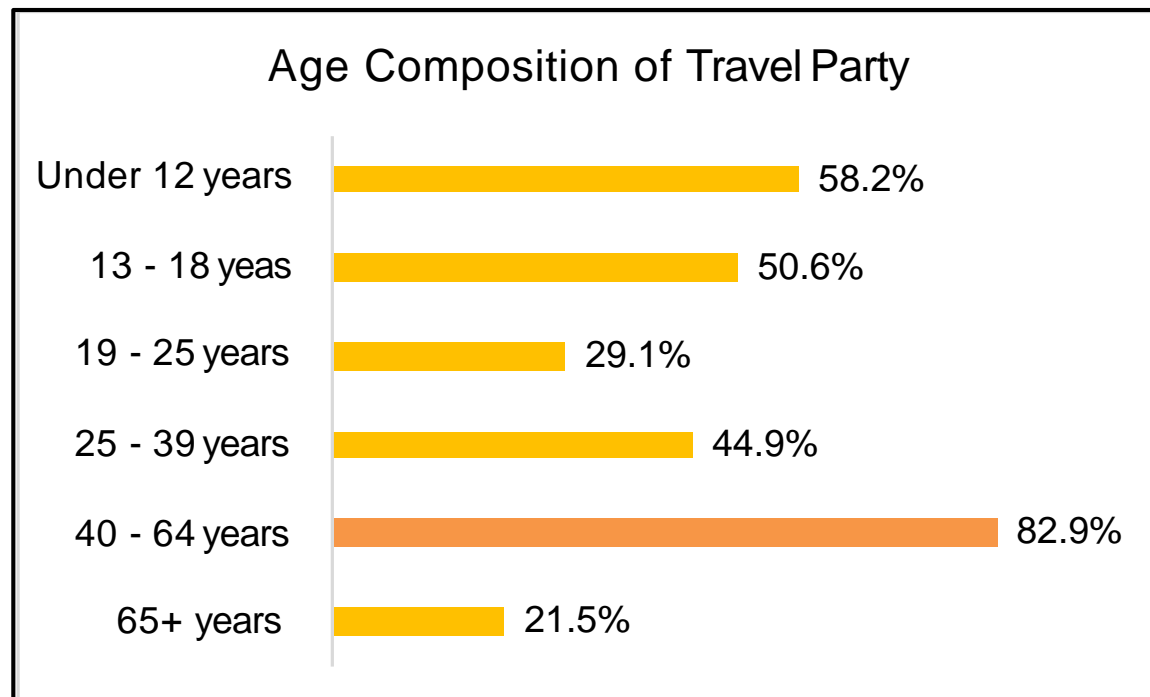


Average: 7.54



Most visitor groups included middle-aged people (ages 40-64) and more than half had children under 12 with them.

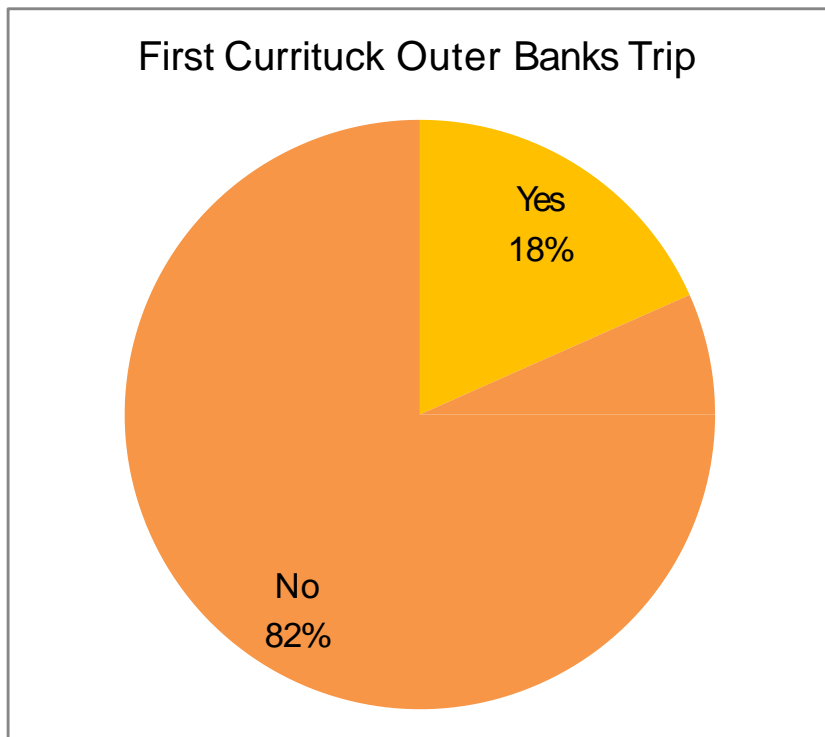
Q: Based on the number of people in your travel party, how many people are in the following age ranges?



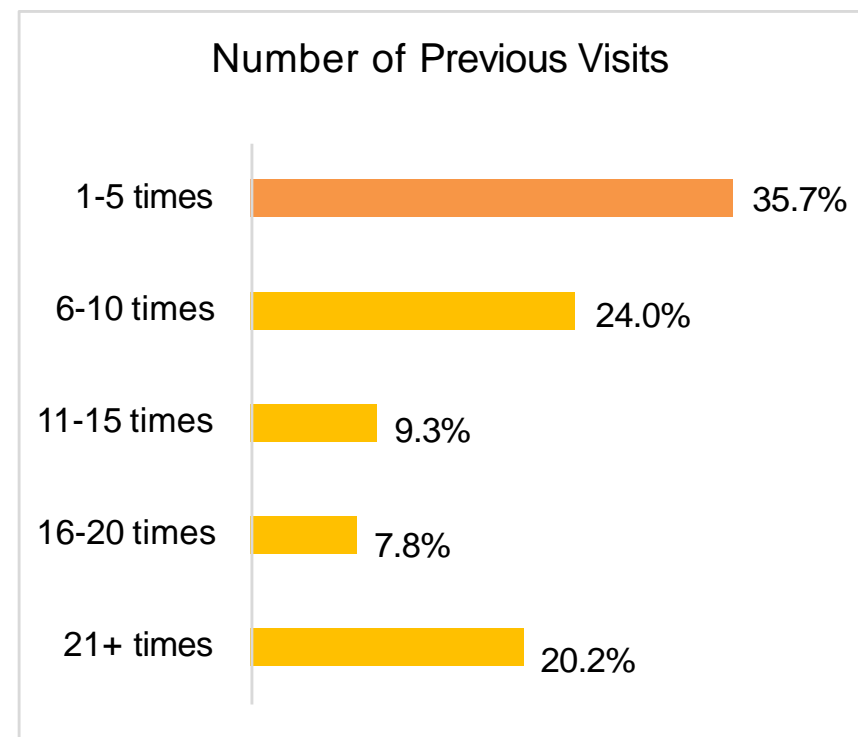


The majority were repeat visitors - one-third of whom had visited 1-5 times before, while one in five had visited more than 21 times.

Q: Was this your first trip to the Outer Banks?



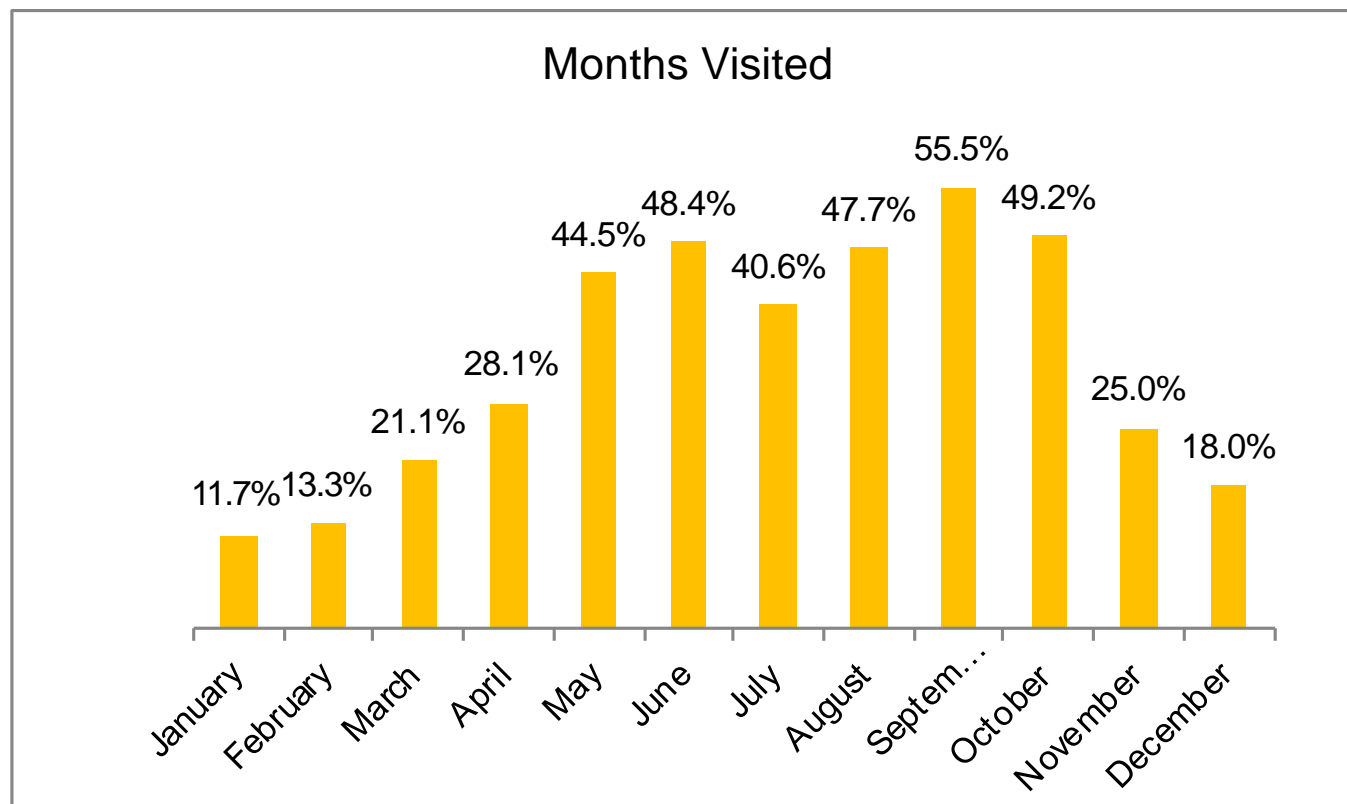
Q: How many times have you visited the Outer Banks before this trip?





Those who had visited in the past, mostly did so during the peak season and into the fall shoulder season.

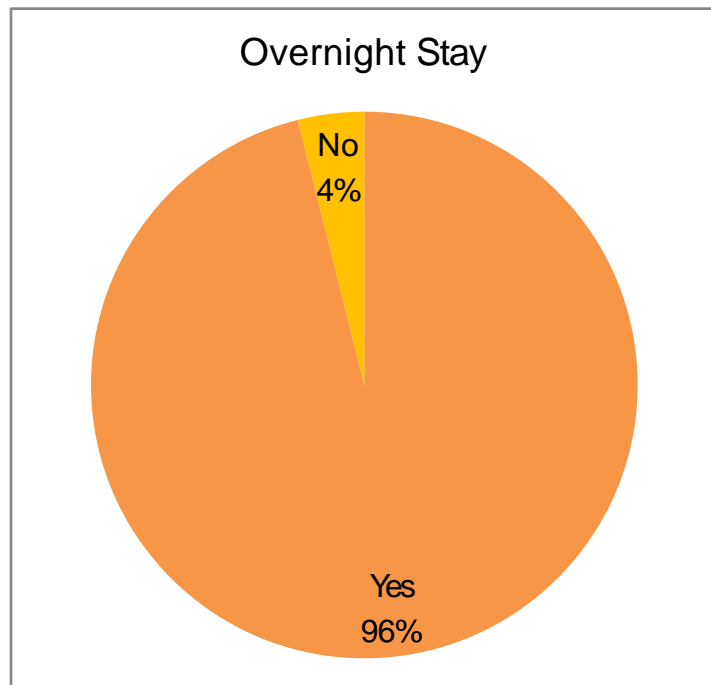
Q: You mentioned that you have visited Currituck Outer Banks in the past. Which months have you visited?



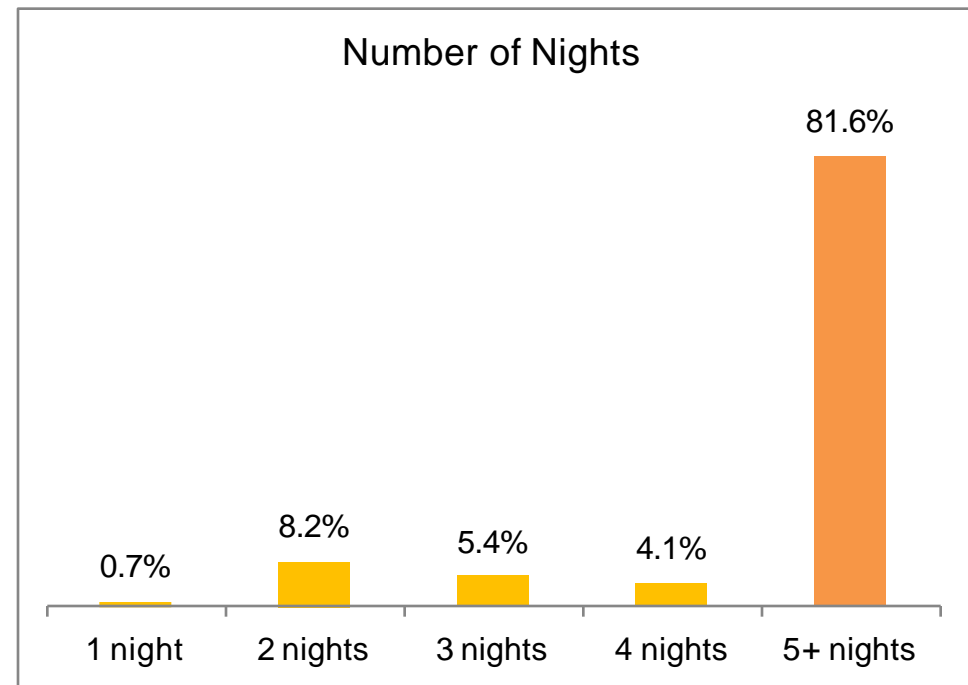


The majority of visitors stayed overnight in the Outer Banks, most of whom stayed for 5 or more nights.

Q: Did you stay overnight in the Outer Banks?



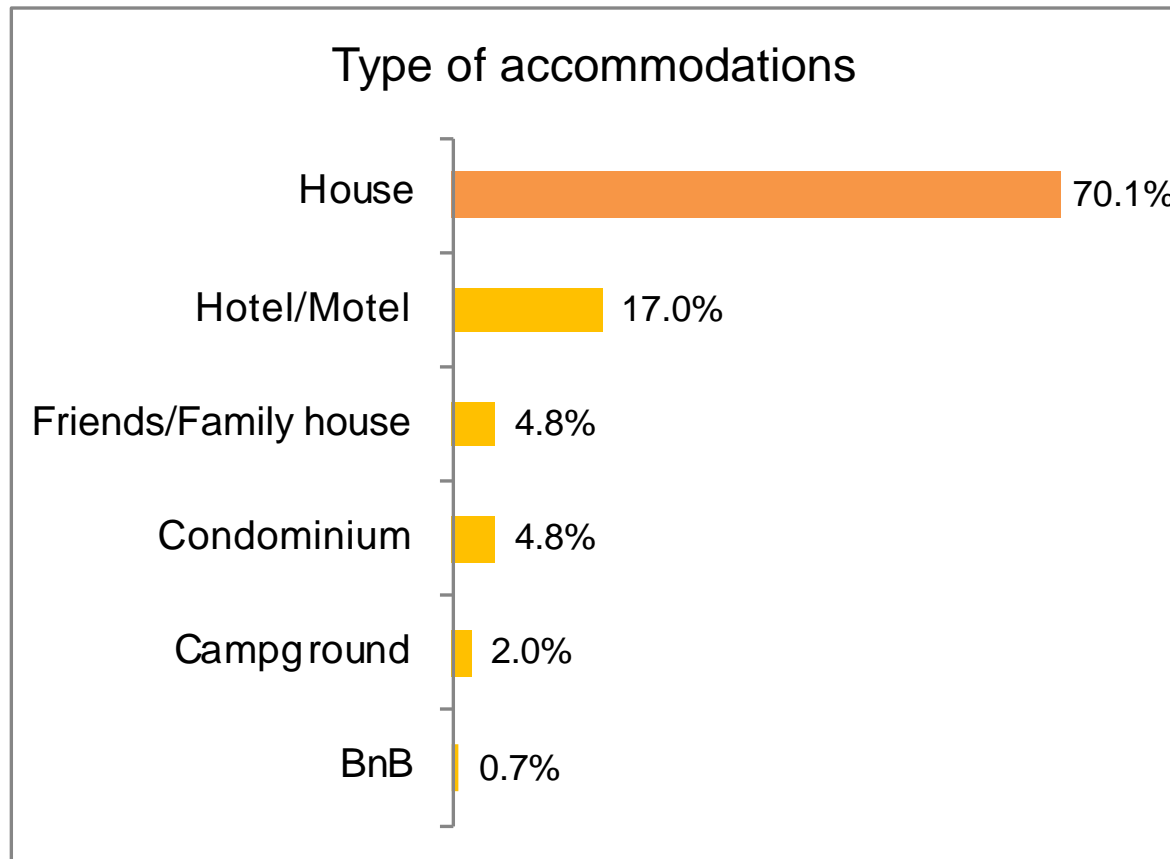
Q: How many nights did you stay?





Most visitors rented a house.

Q: What type of accommodations?

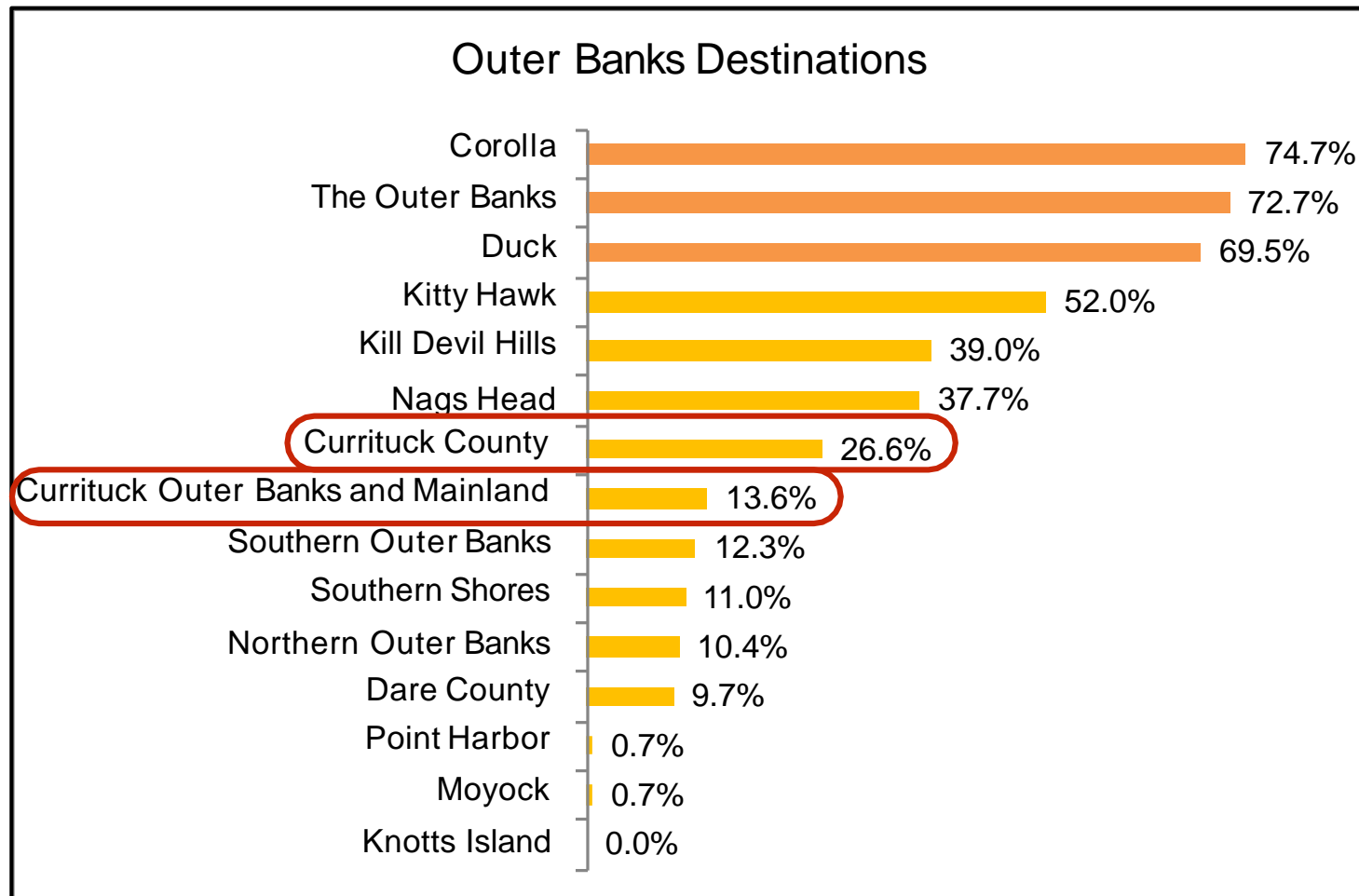




Most visitors visited Corolla, Duck or what they would consider the general Outer Banks.

Did they know they were in Currituck County? Rarely.

Q: Which of the following places did you or do you plan to visit during your current trip?



Visitors spent an average of five days on the beach.

Q: How many days did you spend at the beach, actually on the sand, during your trip?

**Average number
of beach days**

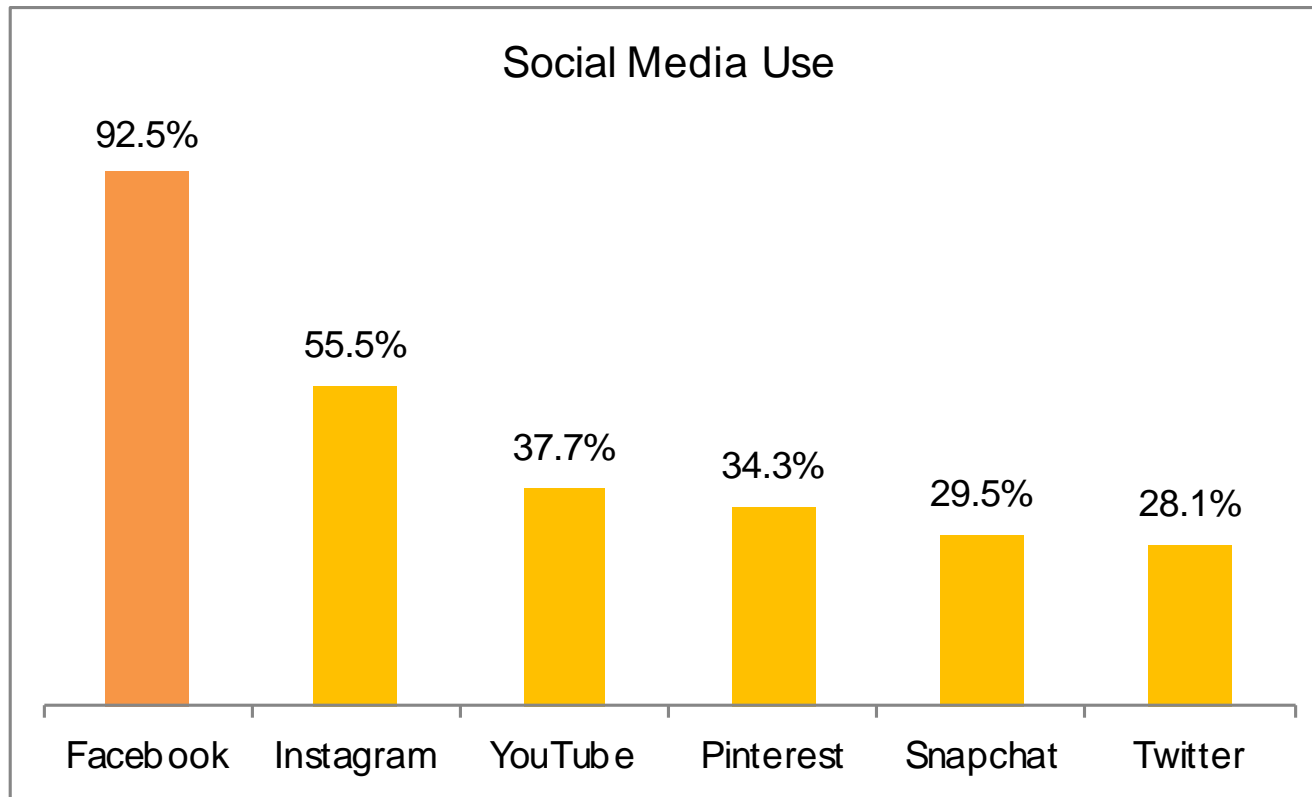


4.8



Almost all visitors use Facebook and half also use Instagram.

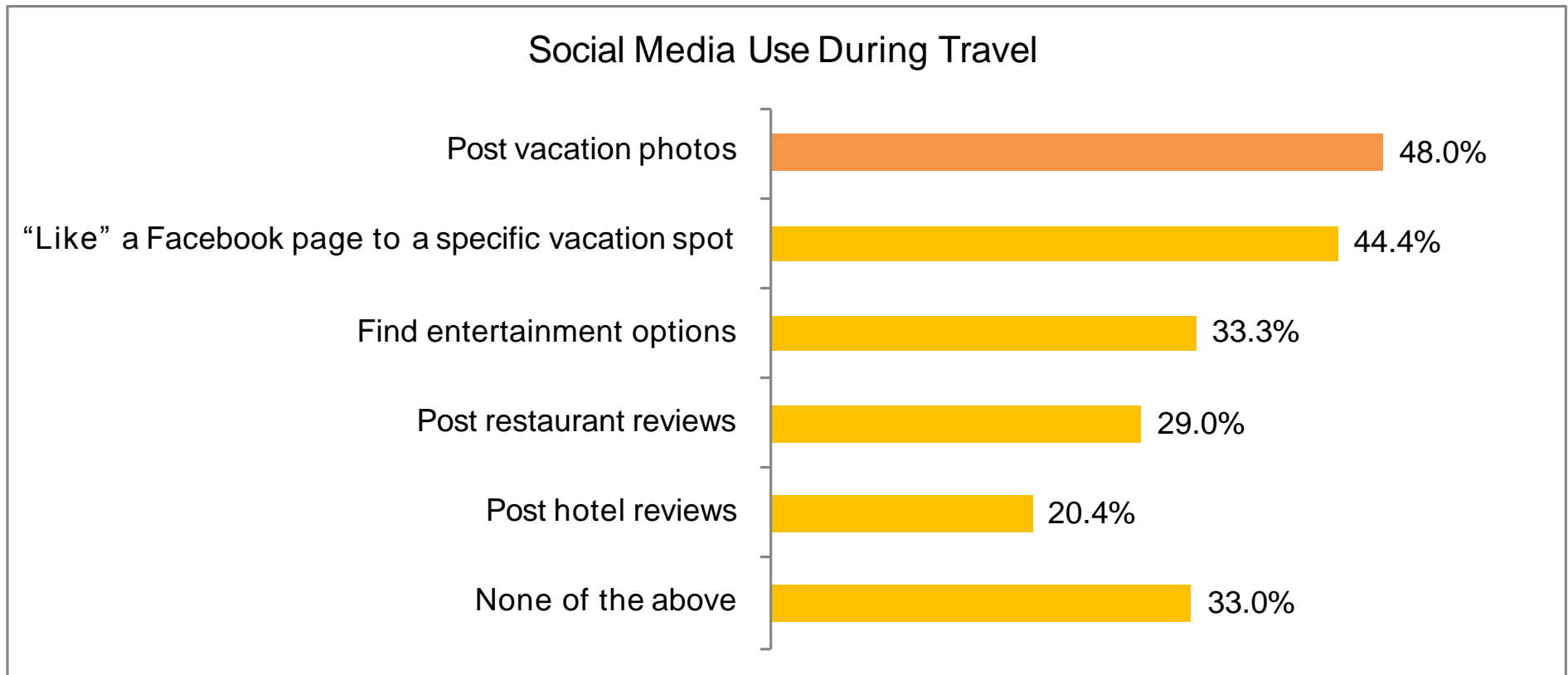
Q: Which of the following social media outlets do you use?





Once on vacation, nearly half use social media to post photos and “like” their vacation spot on Facebook.

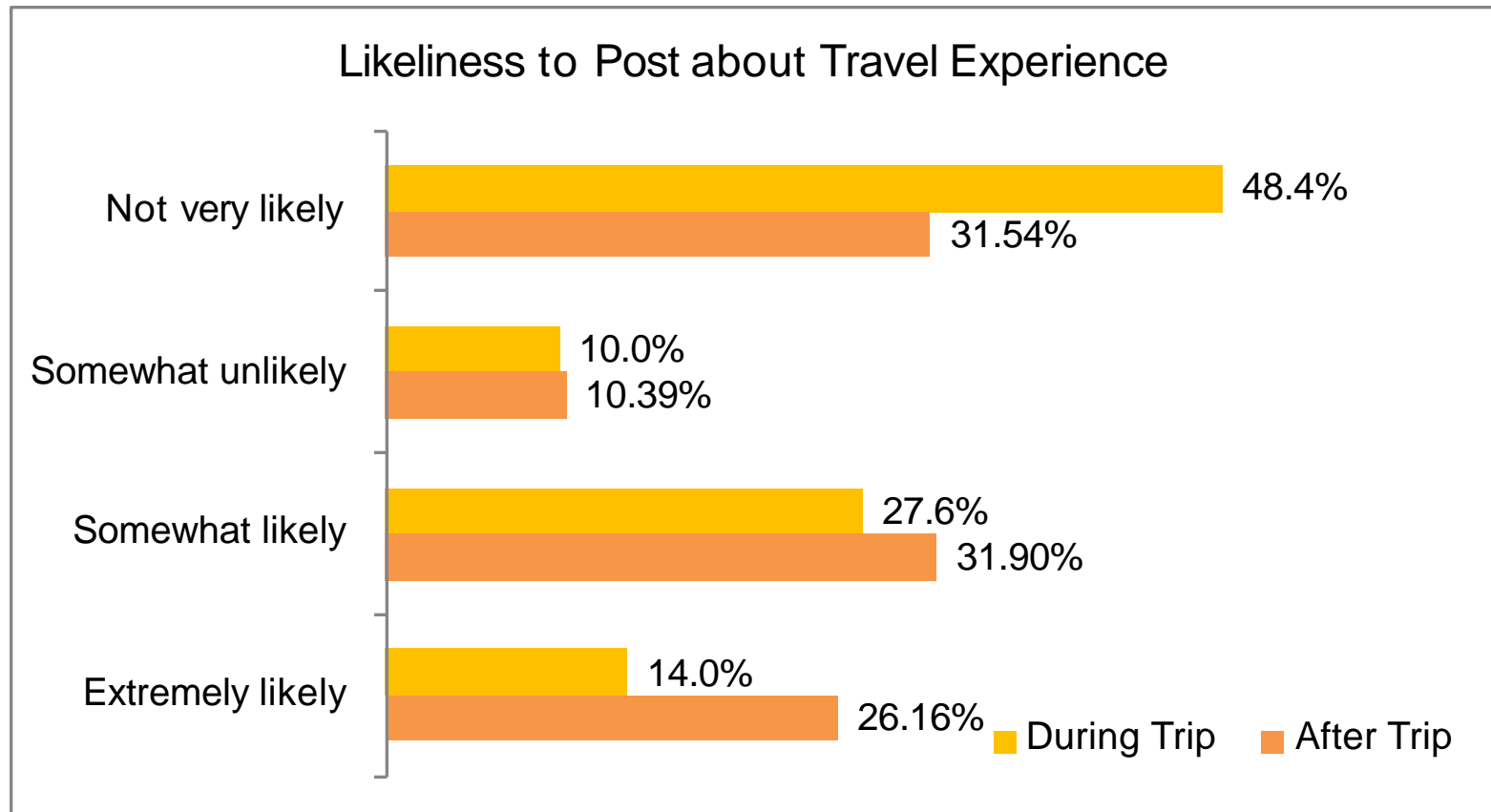
Q: During your travel experience, which of the following do you do via social media?





42% of Visitors post about their travel during their trip and even more (58%) after their trip.

Q: How likely are you to post about your travel experiences during your trip vs. after your trip?





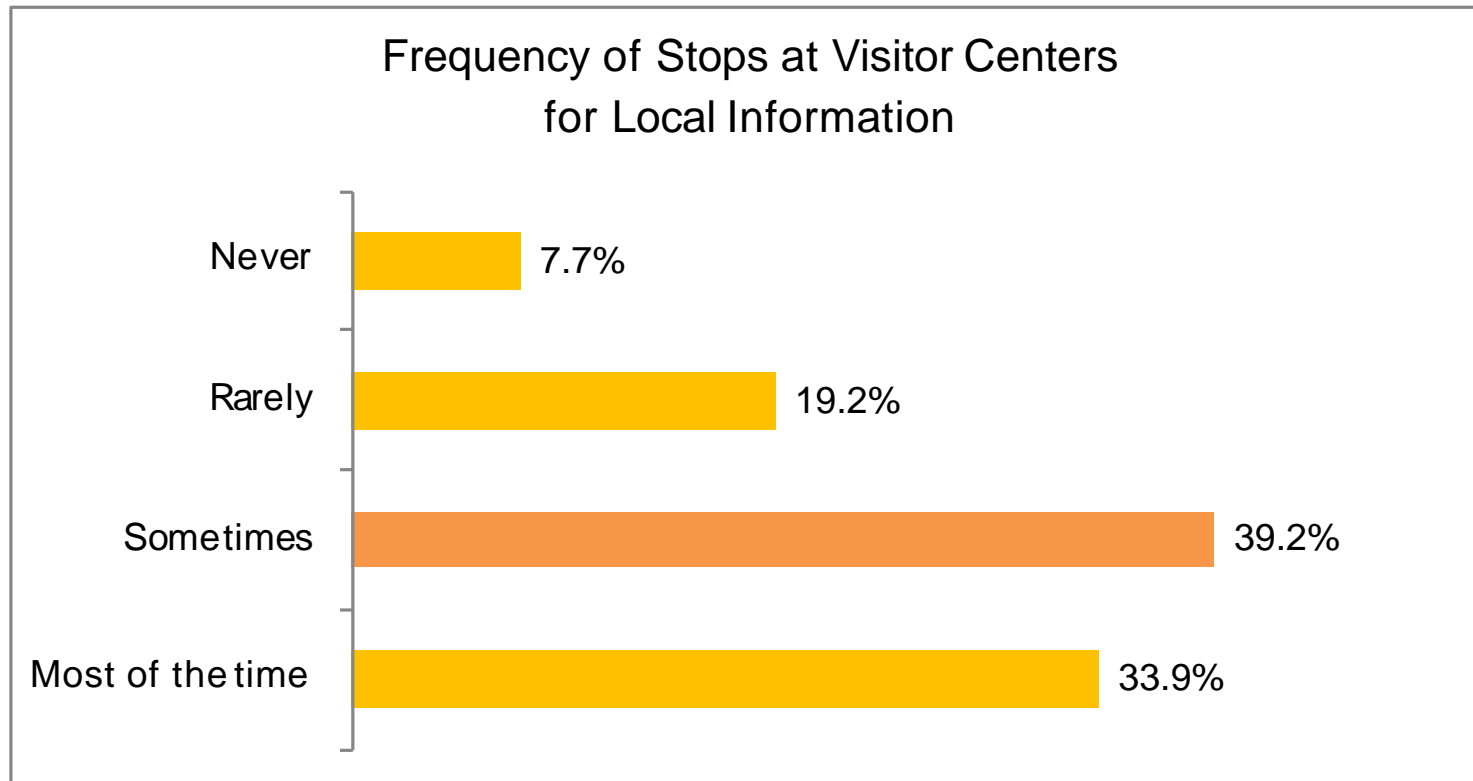
Instagram Hashtag Volume

#currituckouterbanks	105
#currituckobx	572
#corollanc	23,674
#outerbanks	512,605
#outerbanksnc	43,387
#nagshead	140,961
#ducknc	39,487
#virginiabeach	1,323,649



About two-thirds of visitors have a habit of stopping at visitor centers for local information when visiting an area.

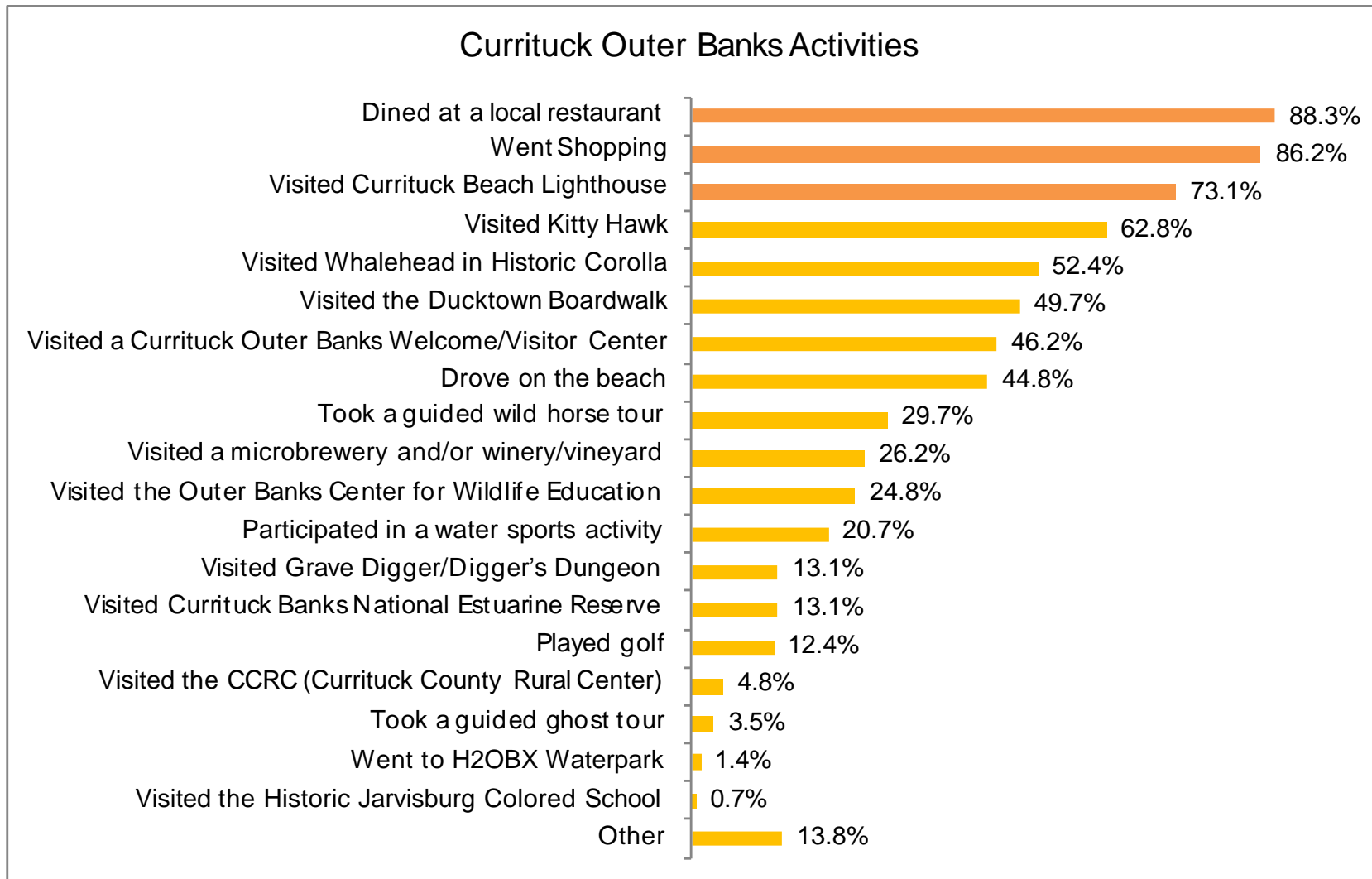
Q: When visiting an area, how often do you stop at a visitor center for local information?





The majority of visitors shopped and dined during their visit and saw the lighthouse. Many visited neighboring beach towns, such as Kitty Hawk or Duck. Mainland attractions were least attended.

Q: Which of the following activities did you and your travel party participate in while visiting Currituck Outer Banks?





Visitors spent an average of 5.3 days on the beach.

Q: How many days did you spend at the beach, actually on the sand, during your trip?

**Average number
of beach days**

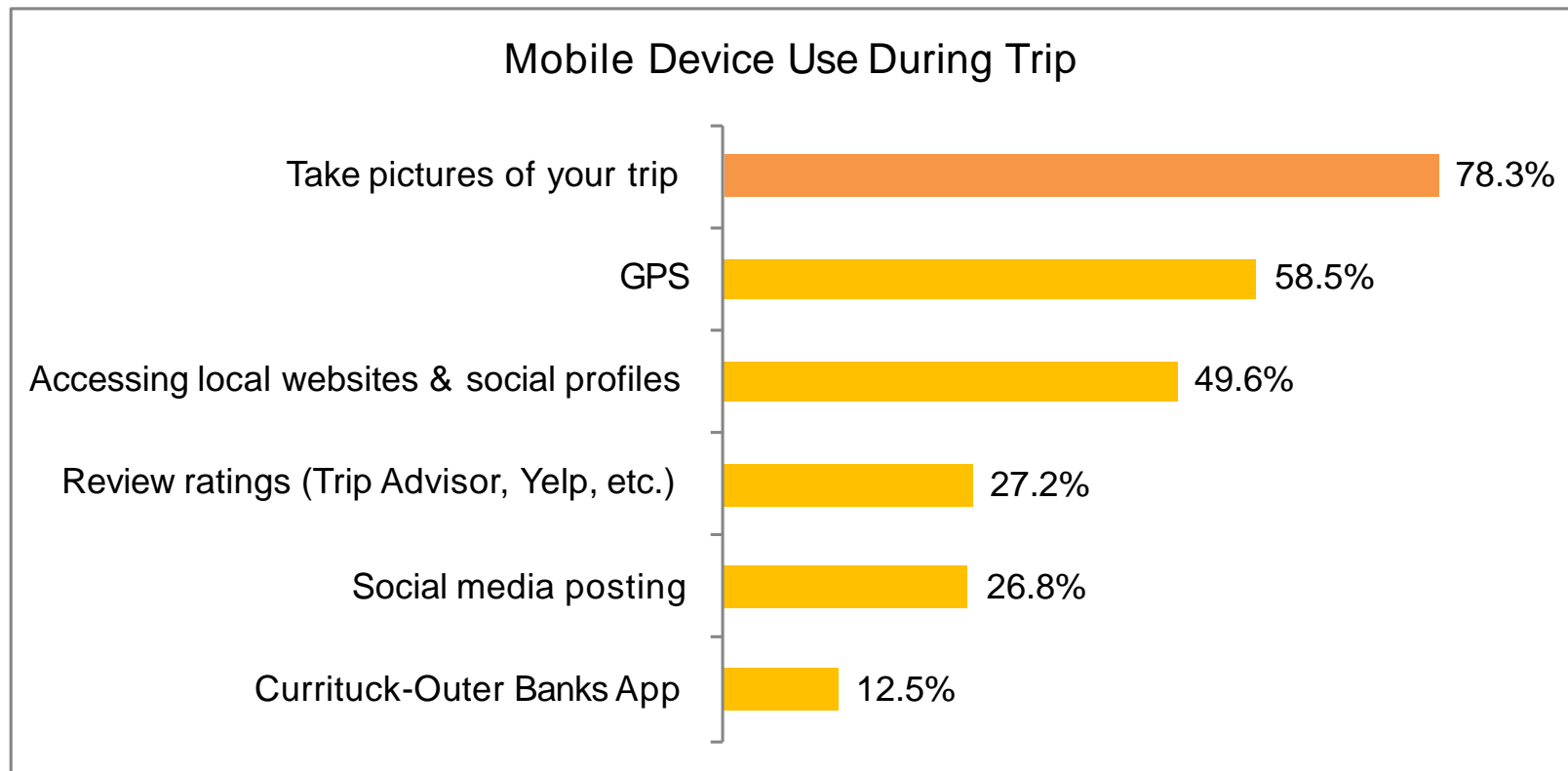


5.3



Visitors primarily used their mobile devices to take pictures during their trip. The Currituck Outer Banks app did not appear popular.

Q: During your current trip to the Outer Banks, which of the following activities did you use your mobile device for?





**Average per person spending
\$463.07**

Combines the result of Visitor intercepts and the Inquiry database study.





Visitor
perceptions
and
performance of
Currituck OBX
tourism



Its 4 x 4 beach area and the wild horses set Currituck Outer Banks apart from the rest of the Outer Banks.

Q: What makes this part of the Outer Banks different from other parts of the Outer Banks?

1. 4 x 4 Beach
2. Wild horses
3. Less commercial
4. Less crowded
5. Beautiful beach
6. Lighthouse
7. Historic/history
8. Family-friendly
9. Shopping





What makes this part of the Outer Banks different from the rest?

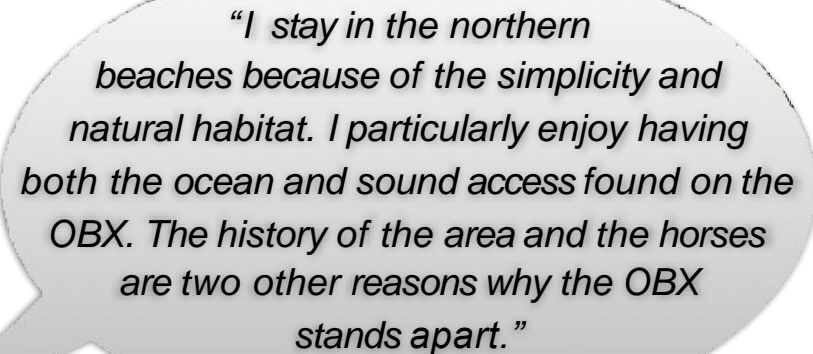




Its beaches and peaceful, less crowded atmosphere make the Outer Banks different.

Q: What makes the Outer Banks different from other destinations?

- Beautiful, clean beach
- Beautiful place
- Relaxing/peaceful/laid back atmosphere
- Less crowded
- Family-friendly
- Dog-friendly
- The ocean
- Wild horses
- More natural
- Variety of activities
- Great location
- Feels like home

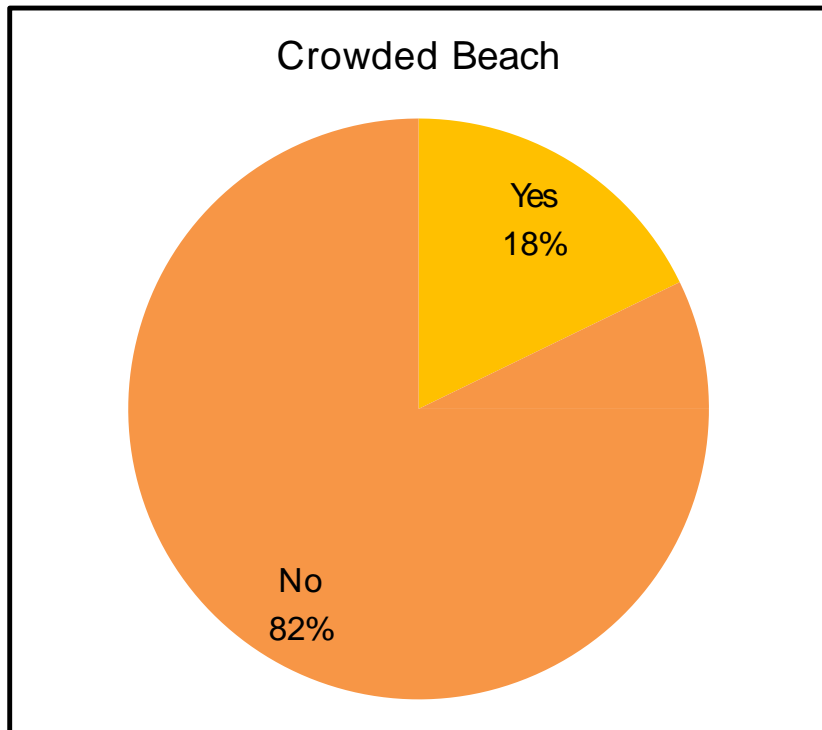


"I stay in the northern beaches because of the simplicity and natural habitat. I particularly enjoy having both the ocean and sound access found on the OBX. The history of the area and the horses are two other reasons why the OBX stands apart."

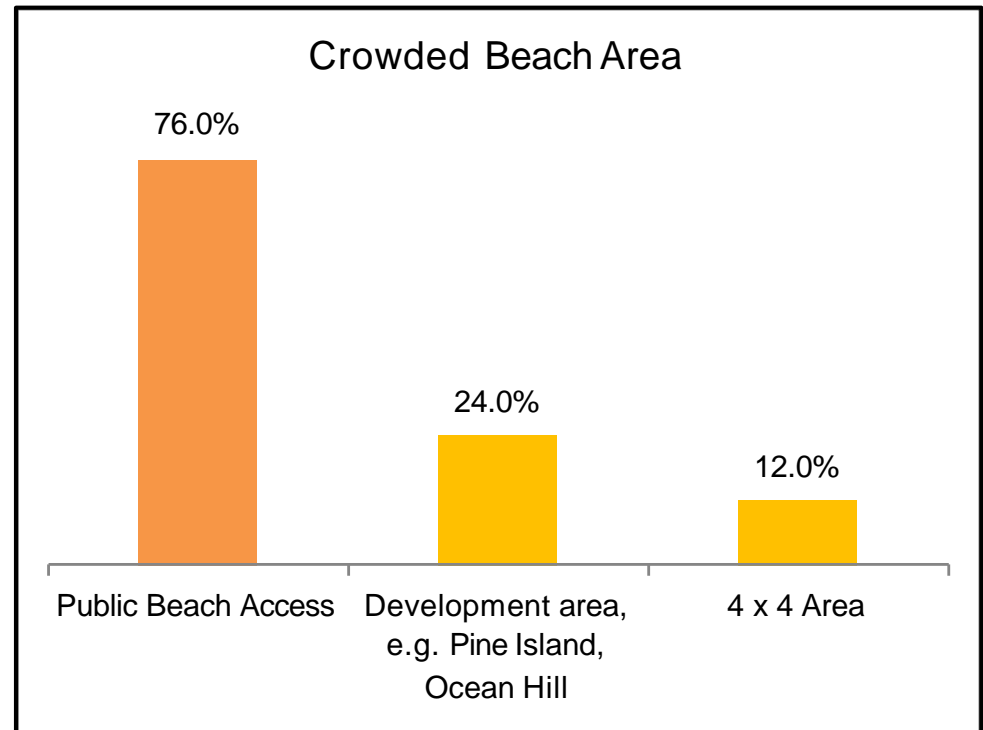


Most visitors did not perceive the beach to be crowded. Those who did, said it was the public beach access, which appeared crowded.

Q: Did you find the beach to be crowded?



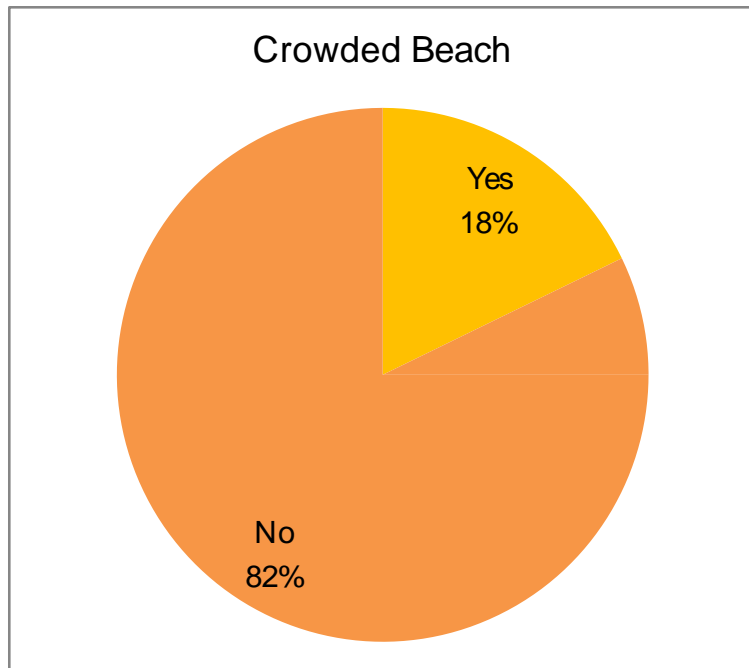
Q: What area on the beach did you find to be crowded?



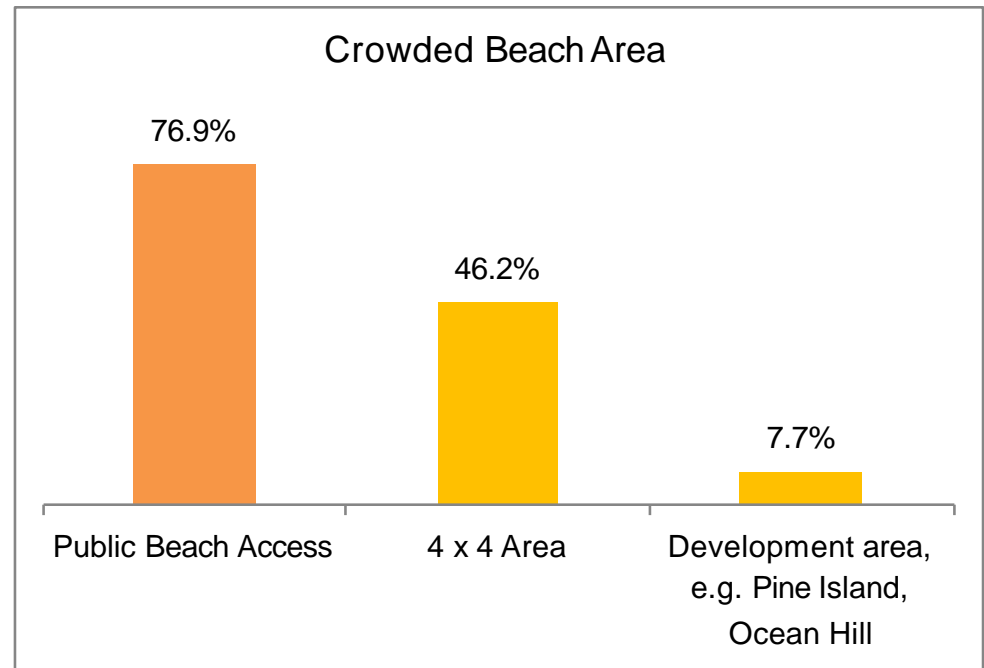


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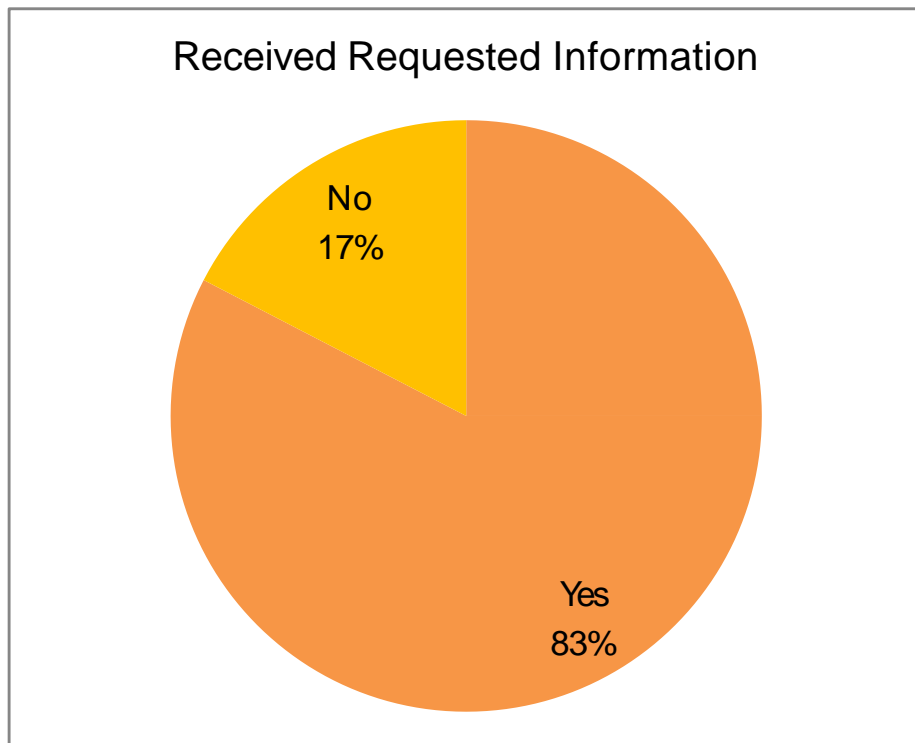
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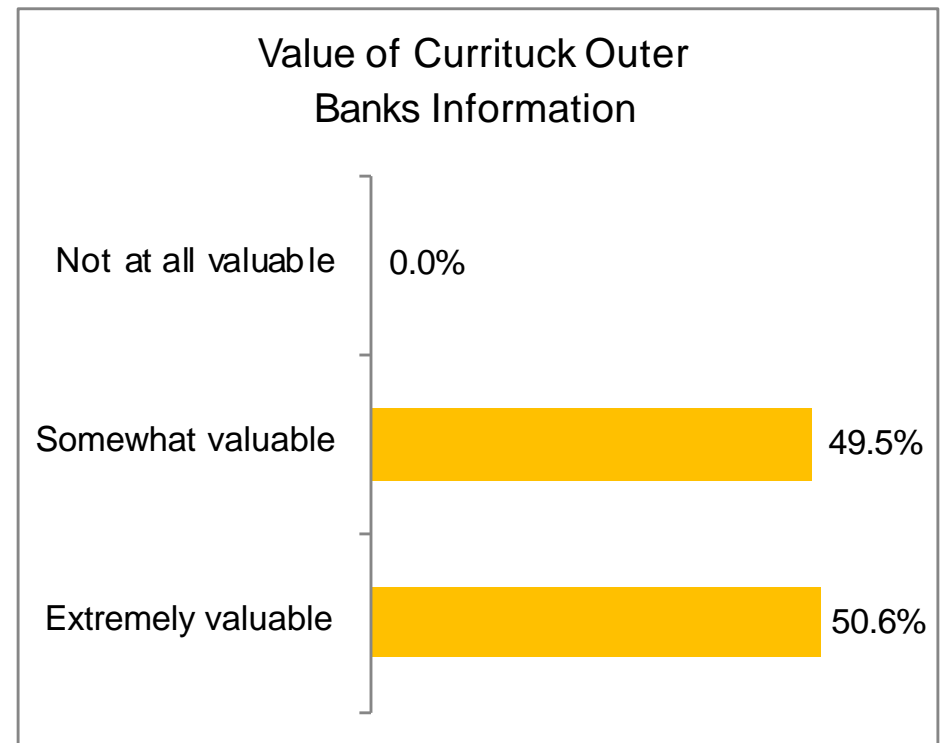


The majority of people received their requested visitor information packages and found them to be valuable.

Q: Did you receive the visitor information you requested regarding Currituck Outer Banks?



Q: How valuable was the information you received regarding Currituck Outer Banks?

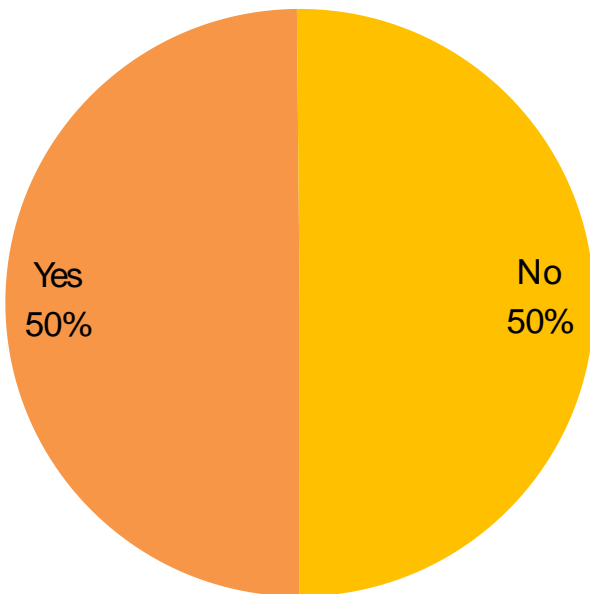




**Half of all inquiries converted into actual visits.
However, two-thirds of people who had not visited,
planned to do so in the future.**

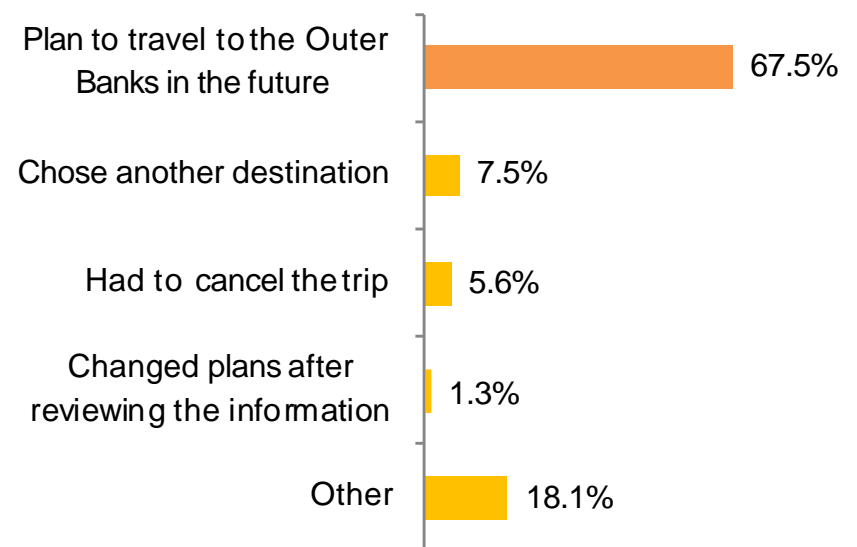
Q: Have you traveled to or through Currituck Outer Banks since receiving the requested information?

Traveled to/through Currituck Outer Banks since Receipt of Information?



Q: Why have you not traveled to Currituck Outer Banks?

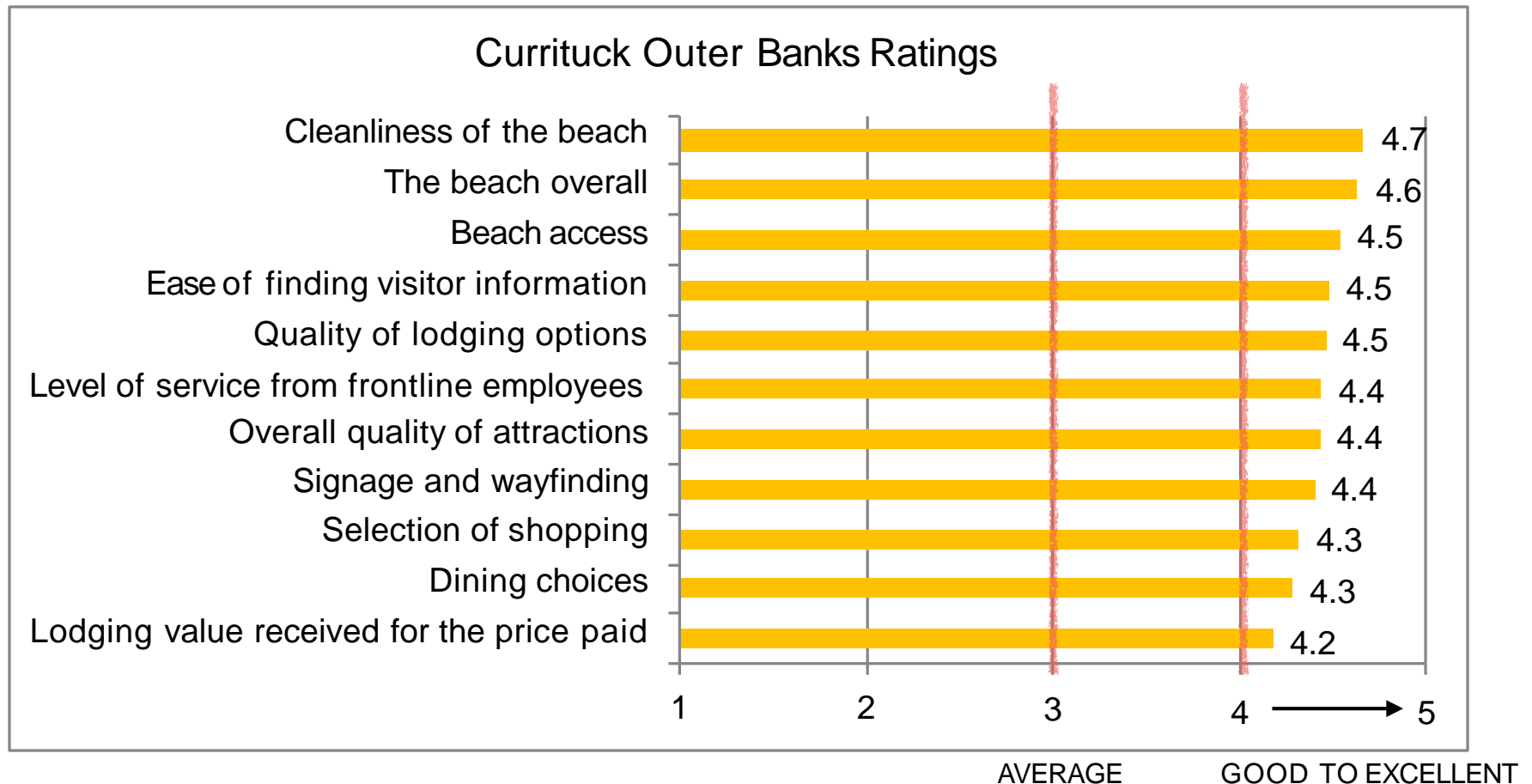
Why have you not traveled to Currituck Outer Banks?





Visitors are extremely satisfied with Currituck Outer Banks, rating it very high in all areas.

Q: On a 5-point scale with 1 being “poor” and 5 being “excellent,” how would you rate Currituck Outer Banks in the following areas?





Currituck Outer Banks enjoys an excellent trip rating.

Q: On a 5-point scale with 1 being “poor” and 5 being “excellent,” how would you rate your visit to Currituck Outer Banks?

**Overall Trip
Rating**



4.8



Once they have visited, people are extremely likely to return to Currituck Outer Banks.

Q: Using a 1 to 5 scale with 1 being “not at all likely” and 5 being “will definitely return,” how likely are you to return to Currituck Outer Banks?

Likeliness to Return



4.9



Currituck Outer Banks Facebook page has a large following and consistently provides content creating strong engagement.

Competitive Market	Followers
Currituck Outer Banks	295K
Visit Outer Banks	740K
Kill Devil Hills	8K
Nags Head	23K
Kitty Hawk	6.6K
Virginia Beach	236K
Myrtle Beach	1.8M



Recommendations



Board management should reflect your tourism experiences and activity

- One purpose of your board is to be eyes of the tourism community and govern according to its needs. Currently the Currituck Tourism board consists of one person that lives and works in Corolla, where over 95% of your tourism occurs. Challenge the current board to address this gap in representation.
- Hold board meetings in Corolla (Whalehead), at least half of them. Currituck tourism needs to be more present where tourism is occurring. It keep them in touch with those they represent and with the issues the organization is dealing with everyday.



Product development and preservation should always be a priority of tourism

- Nurture, develop and mine your money highway. Identify developments.
- Actively evaluate the recruiting of a hotel for the mainland side of the bridge. This can pull business from some lower budget conscious Dare County visitors, and it can be a base for H2OBX and Ag Center events.
- Have a plan for the beach parking permit system and be vocal in sharing it with the community. Everyone knows about it and it how it's going to be used needs to come from the Tourism Board.
- Consider the creation of a fall (October) month long event with emphasis on weekends to spike shoulder season. Pigeon Forge successfully did this with the creation of Winterfest (Nov. 6 – Feb. 18).

Thank you!
