



Dare County Strategic Community Survey

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NC STATE

Outreach & Engagement

Dare County Strategic Community Survey

Introduction

During the summer of 2016, Dare County engaged in an Economic Diversification Planning process to demonstrate to all stakeholders that we are moving forward in both visionary and practical ways. Part of the process involved web surveying key community members, because their thoughts and perceptions are important. We valued everyone's participation and therefore created a survey that would take less than 20 minutes to complete.

This survey was being administered by NC State University's Office of Outreach & Engagement. All responses were anonymous. We did not look at individual responses, but used the aggregated information to make decisions.

The survey was broken into eight pages as follows:

- P1: Introduction
- P2: Demographics
- P3: Your relationship with Dare County
- P4: Economic Development and Growth
- P5: Economic Development Policies
- P6: Affordable Housing Priorities
- P7: Future Growth Issues
- P8: Your Opinions

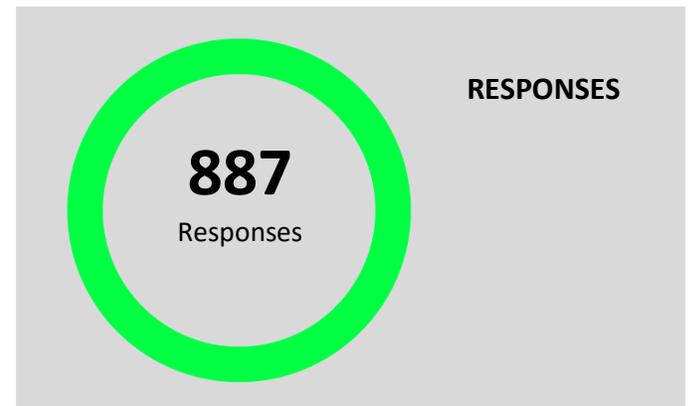
For each statement, the respondents were asked to check the one that best matches what they thought. Their responses will help us understand where we most need to improve—and make decisions for our future. If they did not think they had enough information to rate a topic, they were allowed to check "Don't Know."

15 Groups were requested to forward the invitation web link to their members.

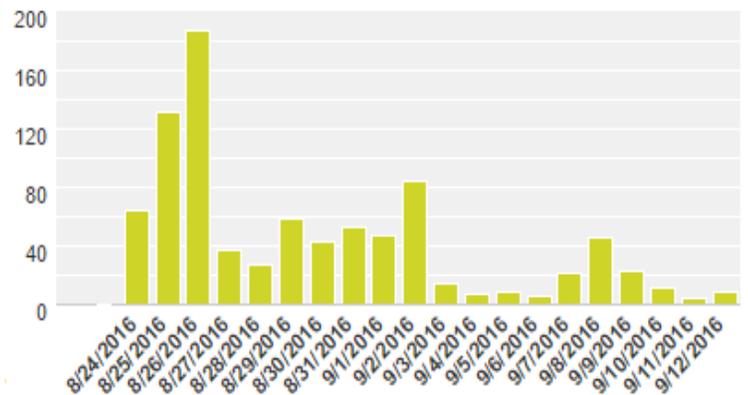
- Outer Banks Chamber of Commerce (their membership)
- Local Media (do you want media coverage about survey being available?)
- Dare County website
- Outer Banks Visitors Bureau (to share with tourism related businesses)
- Towns of Duck, Southern Shores, Kitty Hawk, Kill Devil Hills, Nags Head and Manteo
- Civic Associations on Hatteras Island and Mainland
- Merchant Associations
- Marinas (to share with charter boat owners)
- NC Watermen United (commercial fishermen)
- Dare County Schools, College of Albemarle, Coastal Studies (personnel)
- County and Town employees
- Outer Banks Assn of Realtors (real estate sales and property management companies)
- OB Hotel/Motel Association
- OB Restaurant Association
- OB Wedding Association

For questions that allowed open ended responses, there is a reference, at the bottom of the page, to the complete set of responses contained in the 86 page Appendices document that accompanies this report.

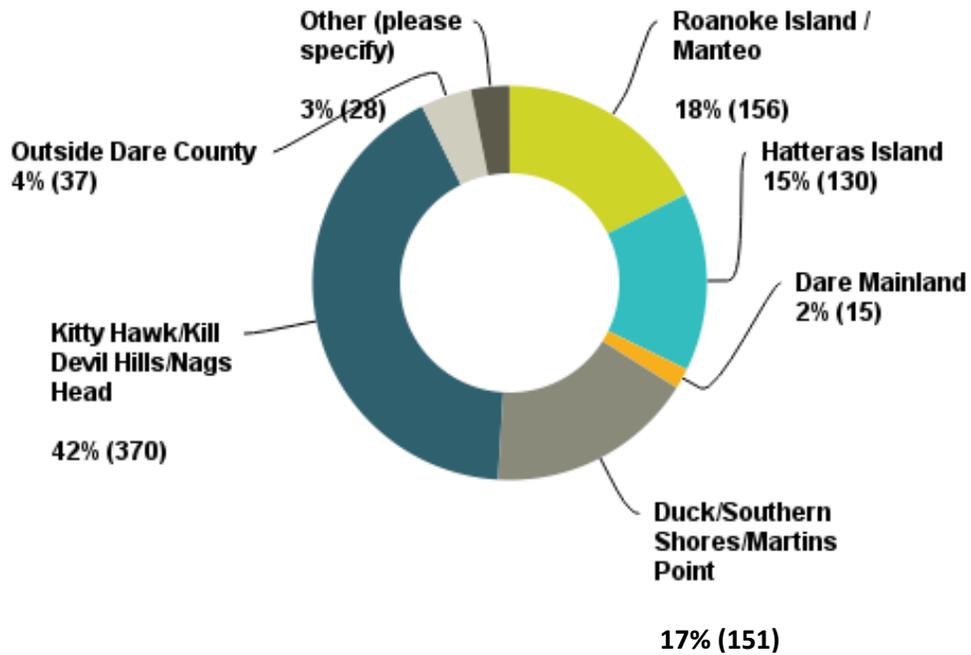
Overall Participation Data



RESPONSE TIMELINE

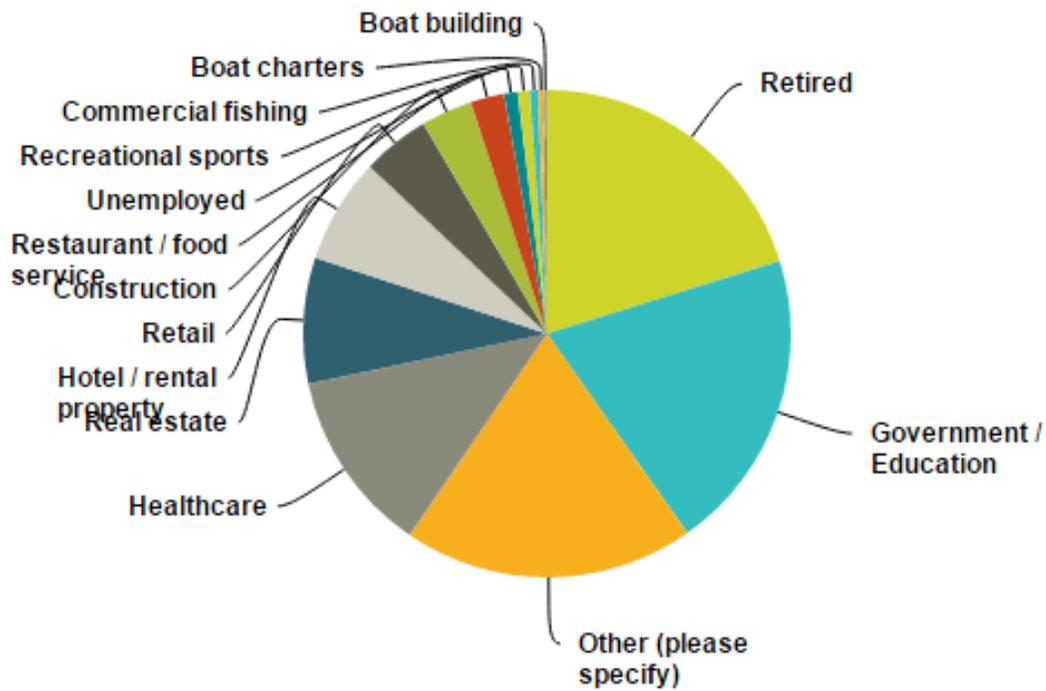


Q1 What area of Dare County do you live in?



Answer Choices	Responses	
Roanoke Island / Manteo	18%	156
Hatteras Island	15%	130
Dare Mainland	2%	15
Duck/Southern Shores/Martins Point	17%	151
Kitty Hawk/Kill Devil Hills/Nags Head	42%	370
Outside Dare County	4%	37
Other (please specify)	3%	28
Total		887

Q2 What is your area of employment?



Answer Choices	Responses
Retired	20% 179
Government / Education	20% 178
Other (please specify) See page 6 for listing of "Other" Responses	19% 171
Healthcare	12% 108
Real estate	8% 74
Hotel / rental property	7% 62
Retail	5% 40
Construction	3% 30
Restaurant / food service	2% 20
Unemployed	1% 8
Recreational sports	1% 7
Commercial fishing	1% 5
Boat charters	0% 3
Boat building	0% 2
Total	887

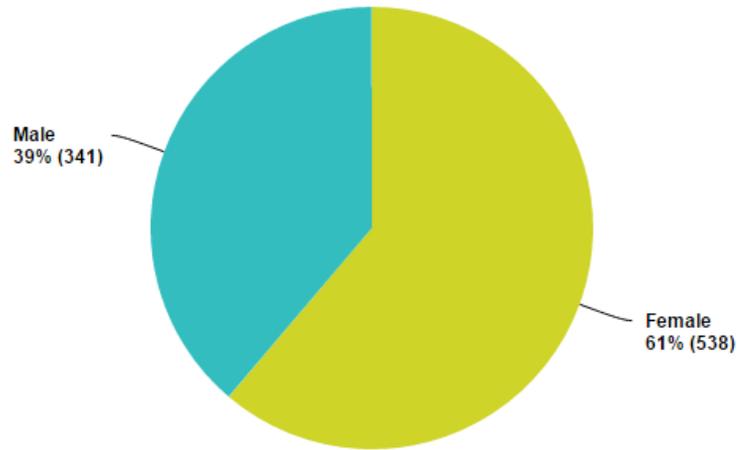
Dare County Strategic Community Survey

Q2 “Other” Responses (171) (19%) for Q2 What is your area of employment?

Public Wedding Industry Marketing Rental Property Sales
 Profit Non-profit Legal Management
 Accounting Consulting Retired
 Insurance Education Service Finance
 Banking Company Self Employed Media
 Engineering Real Estate Utility Information Technology
 Business Swimming Pool Professional
 Law Enforcement

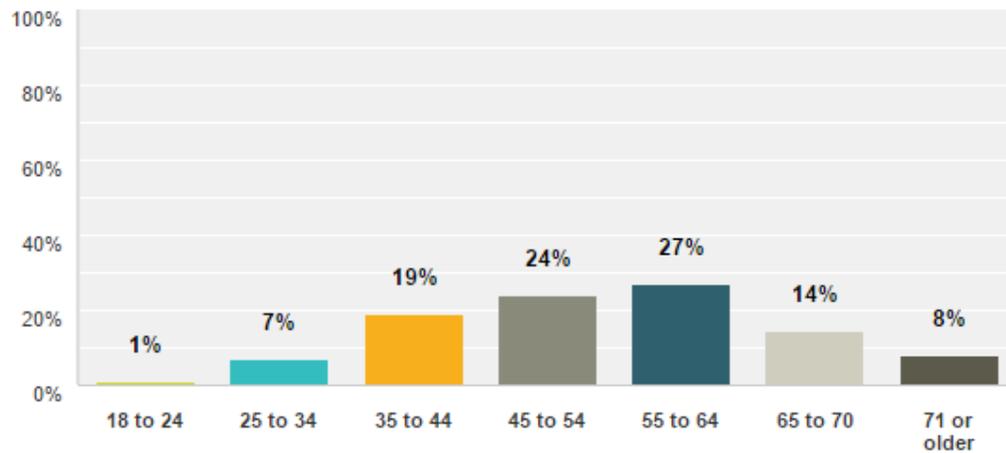
- retired architect/engineer
- Butchery manager
- Corrections
- Media
- Home Inspection
- Systems Administrator
- public accounting
- Non-profit
- Own an art store
- Advertising
- Self employed
- Military
- Teach part-time
- Sales Manager
- Contractor on Air Force Bombing Range
- Native-Retired
- NA test
- Environmental (Oceans)
- Banking
- communications
- Self-employed freelance writer and speaker
- publishing
- banking
- Sales
- Attorney
- Association Management
- homemaker
- own rental property
- self-employed legal consultant
- finance
- Professional (insurance)
- Home Based Videography Business
- Utility worker
- non-profit foundation management
- professional
- Consulting Services
- Entertainment
- Finance/insurance
- Law Enforcement
- power company
- service coordinator for co2/beverage company
- Hair stylist
- early education
- HVAC/R
- Retired
- piano teacher
- consulting
- Law
- insurance
- Church pastor
- Web design and development
- Professional
- Marketing
- community non-profit
- Information Technology
- Wedding Industry Photo/video self employed
- Public Accountant
- marketing
- Charter boat operator
- Land Surveying
- Electric Utility
- Non- Profit
- Tires & Service
- Engineering
- insurance
- self-employed
- State Historic Attraction
- Insurance
- Insurance
- banking
- service
- Retired
- Attorney
- Real estate and restaurants
- banking
- Insurance
- Business Sales
- legal
- publishing
- journalism and research
- Fishing, Real estate.
- student
- weddings and events
- education
- Insurance
- Consulting with Utilities
- emergency services
- The Outer Banks Hospital
- Law Enforcement
- electric utility
- Tourism/marketing
- Insurance and income tax preparation
- Rental Software/Athletics Software Consultant/Retired Army
- Restaurant, military, pool service
- Education (COA) and Media/Self employed
- landscaping
- Vacation second home
- Utilities
- tourism promotion
- Utility
- HVAC
- Artist
- Tourist Attraction
- Non-profit management
- FIRE SERVICE
- I am a pharmacist, however, for KDH I am a rental property owner
- BANKING
- reporter

Q3 What is your gender?



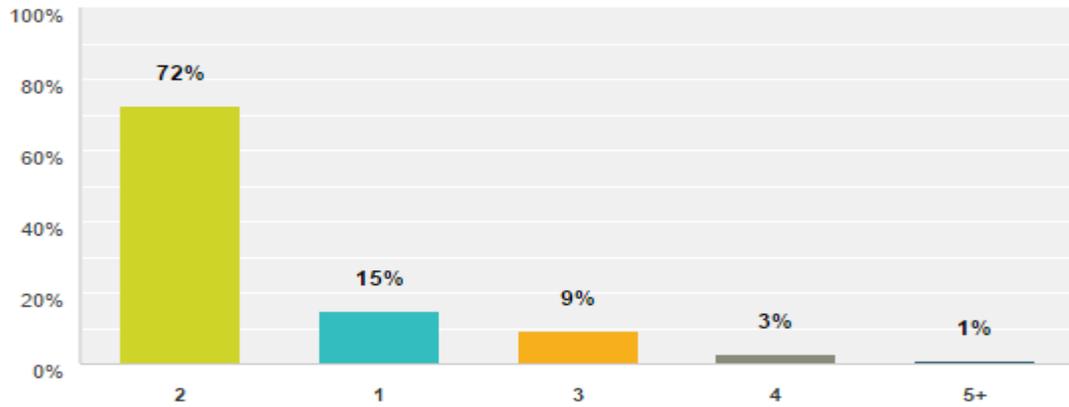
Answer Choices	Responses	
Female	61%	538
Male	39%	341
Total		879

Q4 What is your age?



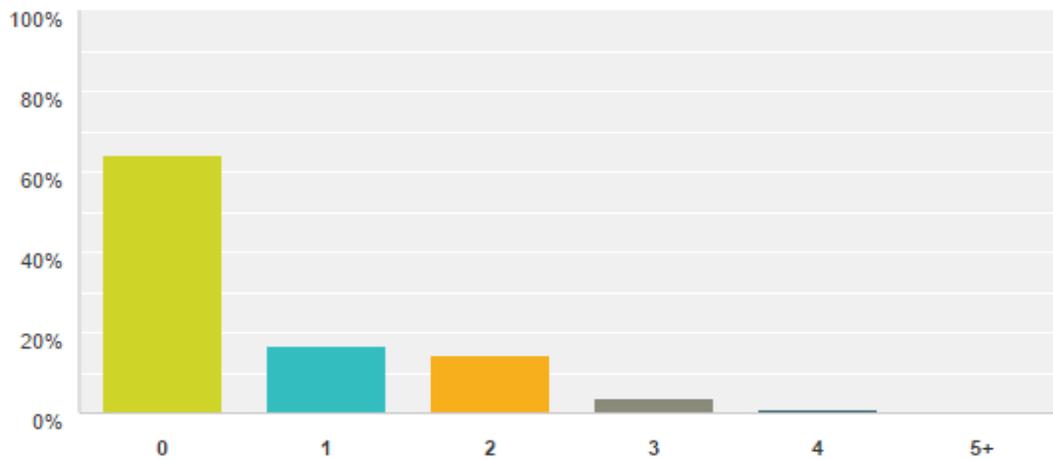
Answer Choices	Responses	
18 to 24	1%	9
25 to 34	7%	61
35 to 44	19%	169
45 to 54	24%	213
55 to 64	27%	238
65 to 70	14%	128
71 or older	8%	69
Total		887

Q5 Number of adults (18+) in household



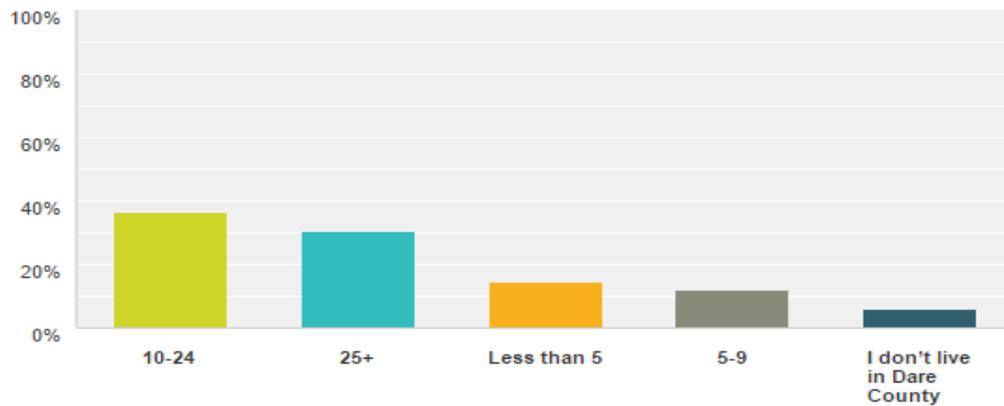
Answer Choices	Responses	
2	72%	643
1	15%	131
3	9%	82
4	3%	23
5+	1%	8
Total		887

Q6 Number of children (under age 18) in household?



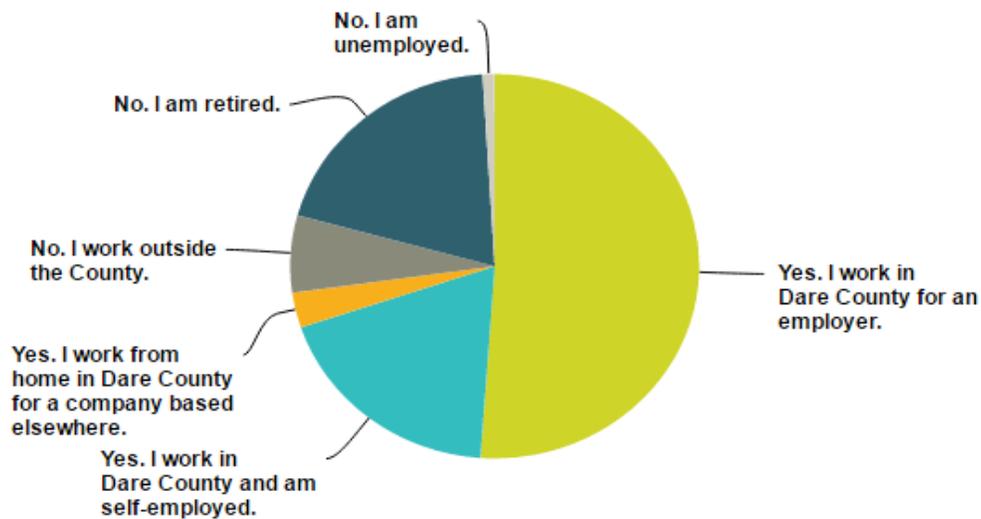
Answer Choices	Responses	
0	64.24%	564
1	16.86%	148
2	14.46%	127
3	3.53%	31
4	0.80%	7
5+	0.11%	1
Total		878

Q7 How many years have you lived in Dare County?



Answer Choices	Responses
10-24	37% 312
25+	31% 261
Less than 5	14% 122
5-9	12% 102
I don't live in Dare County	6% 52
Total	849

Q8 Do you work in Dare County?



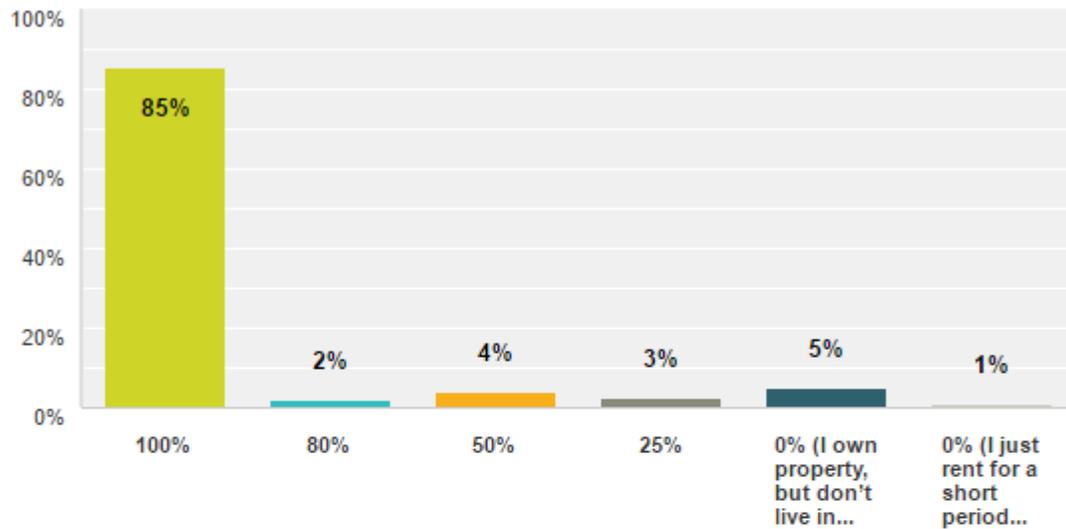
Answer Choices	Responses
Yes. I work in Dare County for an employer.	51.12% 434
Yes. I work in Dare County and am self-employed.	18.73% 159
Yes. I work from home in Dare County for a company based elsewhere.	2.94% 25
No. I work outside the County.	6.48% 55
No. I am retired.	19.79% 168
No. I am unemployed.	0.94% 8
Total	849

Q9 If you answered that you "work from home for a company based elsewhere" in question 8, what drew you to live in Dare County?

OBX Husband Dare County Live Family
 Lifestyle Beach Duck Love Surfing
 Vacation Home

See separate Appendix A for a complete listing of 48 written responses.

Q10 What is the percentage of time you live (reside) in Dare County?



Answer Choices	Responses	
100%	85%	725
80%	2%	17
50%	4%	35
25%	3%	23
0% (I own property, but don't live in Dare County)	5%	41
0% (I just rent for a short period during the summer)	1%	8
Total		849

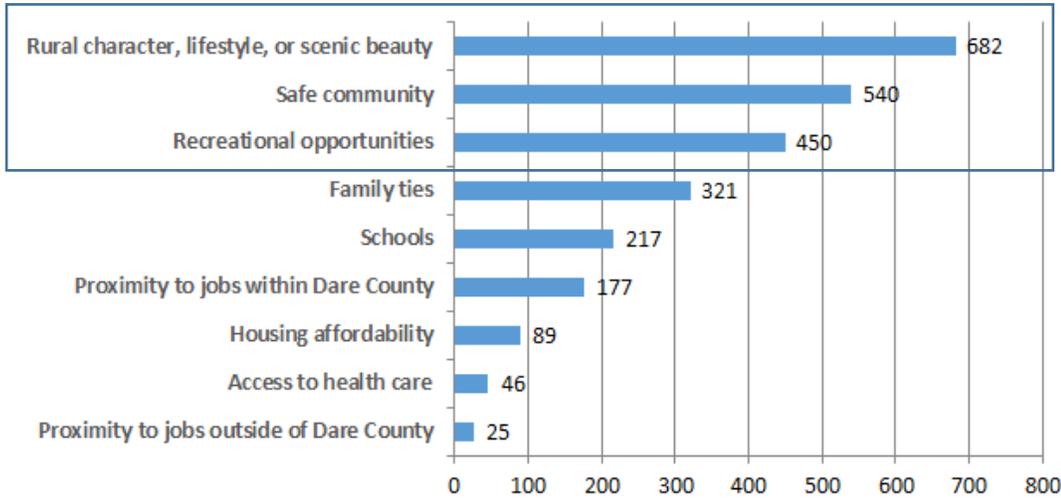
Q11 What are the top 3 reasons you chose to live in Dare County?

Answered: 849 Skipped: 38

1st: Rural character, lifestyle, or scenic beauty

2nd: Safe community

3rd: Recreational opportunities



Based upon total votes for each choice.

1st
2nd
3rd

	1st - Most Important	2nd	3rd	Total	Weighted Average
Rural character, lifestyle, or scenic beauty	46.77% 319	31.67% 216	21.55% 147	682	1.75
Safe community	14.07% 76	37.22% 201	48.70% 263	540	2.35
Recreational opportunities	22.67% 102	42.22% 190	35.11% 158	450	2.12
Family ties	61.99% 199	17.13% 55	20.87% 67	321	1.59
Schools	23.96% 52	44.70% 97	31.34% 68	217	2.07
Proximity to jobs within Dare County	45.20% 80	25.42% 45	29.38% 52	177	1.84
Housing affordability	11.24% 10	25.84% 23	62.92% 56	89	2.52
Access to health care	13.04% 6	32.61% 15	54.35% 25	46	2.41
Proximity to jobs outside of Dare County	20.00% 5	28.00% 7	52.00% 13	25	2.32

See separate Appendix B for a complete listing of 100 written responses.

Q12 Please rank your **top 5 choices, for future growth and development priorities.**



Based upon total votes for each choice.

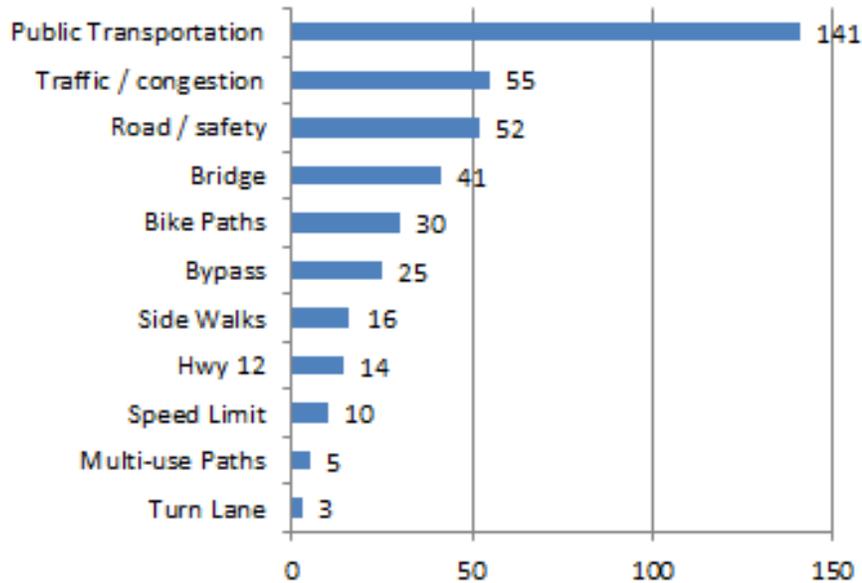
	1st	2nd	3rd	4th	5th	Total	Weighted Average
1st Preservation of existing natural areas.	30.37% 171	20.07% 113	13.68% 77	18.29% 103	17.58% 99	563	2.73
2nd More year round local job opportunities.	35.05% 197	17.97% 101	13.70% 77	16.55% 93	16.73% 94	562	2.62
3rd Expand healthcare services.	19.54% 94	18.92% 91	25.36% 122	20.37% 98	15.80% 76	481	2.94
4th A more diversified tax base, less reliance on tourism & residential property taxes.	18.63% 87	24.20% 113	19.49% 91	18.42% 86	19.27% 90	467	2.96
5th More opportunities to walk and bike to destinations.	17.41% 78	26.79% 120	20.09% 90	20.54% 92	15.18% 68	448	2.89
More diverse housing options.	18.00% 72	23.00% 92	20.25% 81	20.50% 82	18.25% 73	400	2.98
Educational opportunities.	10.36% 40	20.98% 81	27.72% 107	19.17% 74	21.76% 84	386	3.21
Provide more retirement care options & facilities for seniors.	9.78% 31	13.56% 43	20.19% 64	23.03% 73	33.44% 106	317	3.57
More programs & services for seniors.	9.52% 22	14.29% 33	21.21% 49	26.41% 61	28.57% 66	231	3.50
Mixed-use development (residential/non-residential mix).	8.65% 16	11.35% 21	27.03% 50	24.86% 46	28.11% 52	185	3.52

See separate Appendix C for a complete listing of 58 written responses.

Q13 Is there a specific **transportation issue that you would like to see addressed?**

Answered: 474 Skipped: 413

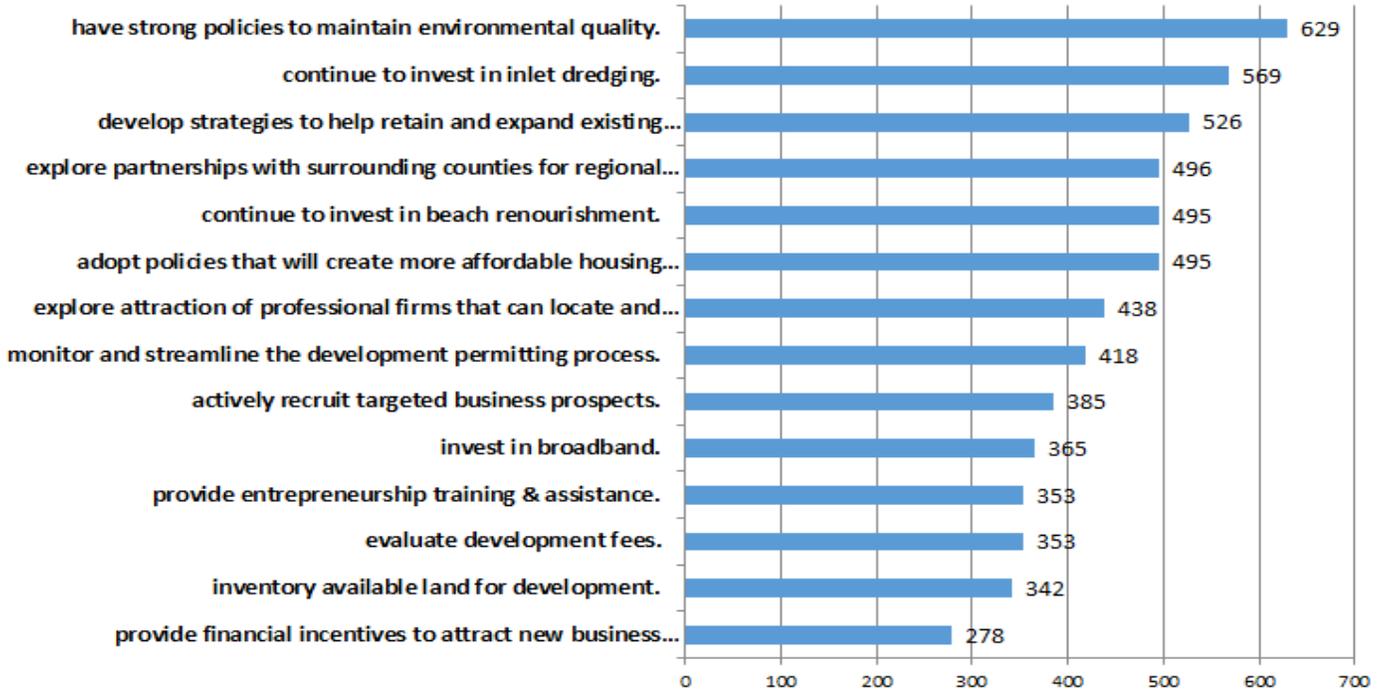
Speed Limit Turn Lane Bus Service Mass Transit
 Nags Head Multi-use Paths Side Walks Trolley
 Bypass Bus Transportation Road
 Hatteras Island Traffic Safety
 Public Transportation Safer
 Bridge Manteo Bike Paths Public Transit
 Buses Year Round Congestion Shuttle Service
 Hwy 12 Rt 12 Bus System Access



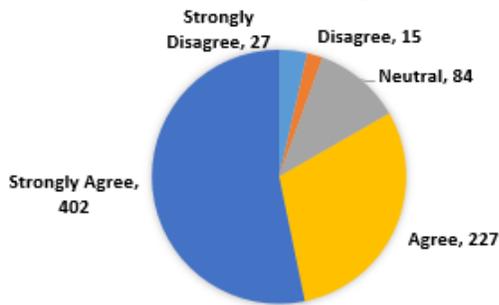
See separate Appendix D for a complete listing of 474 written responses.

Q14 ... what Dare County and local government should do as local economic development policies and strategies.

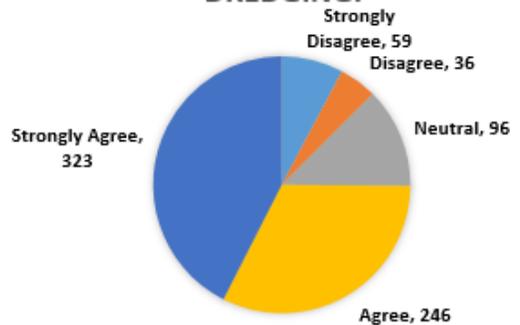
Local government should: (rank based upon totals of “Agree” + “Strongly Agree”)



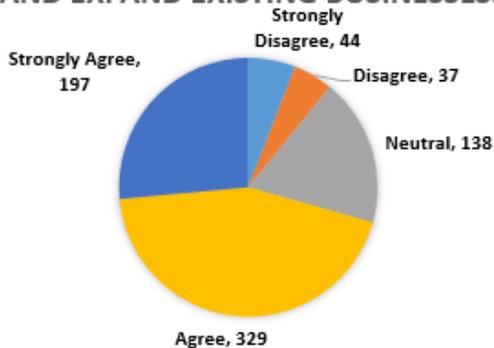
HAVE STRONG POLICIES TO MAINTAIN ENVIRONMENTAL QUALITY.



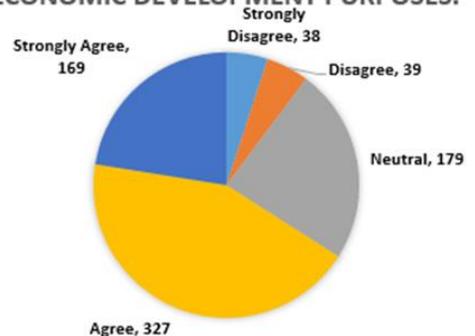
CONTINUE TO INVEST IN INLET DREDGING.



DEVELOP STRATEGIES TO HELP RETAIN AND EXPAND EXISTING BUSINESSES.

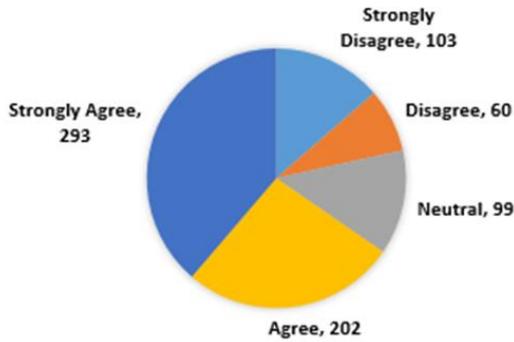


EXPLORE PARTNERSHIPS WITH SURROUNDING COUNTIES FOR REGIONAL ECONOMIC DEVELOPMENT PURPOSES.

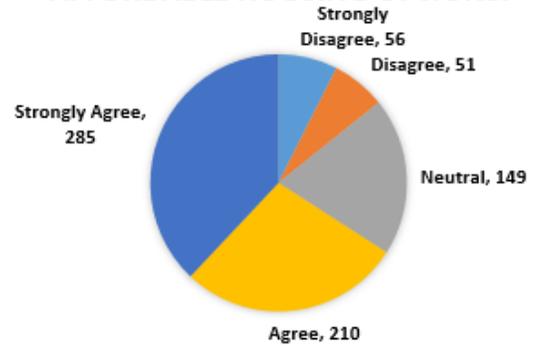


Q14 ... what Dare County and local government should do as local economic development policies and strategies. (continued) Local government should:

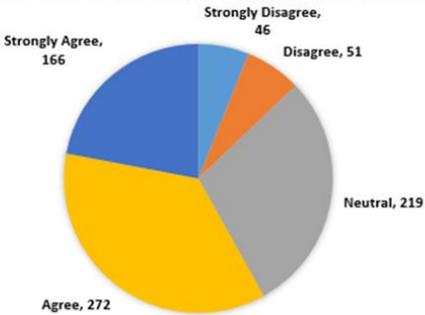
CONTINUE TO INVEST IN BEACH RENOURISHMENT.



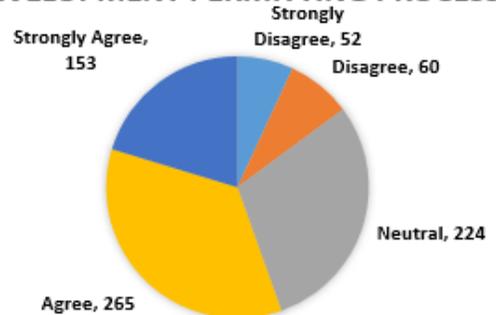
ADOPT POLICIES THAT WILL CREATE MORE AFFORDABLE HOUSING OPTIONS.



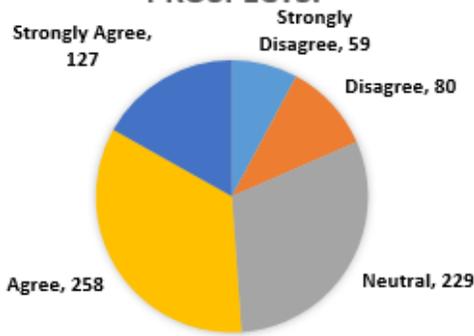
EXPLORE ATTRACTION OF PROFESSIONAL FIRMS THAT CAN LOCATE AND WORK ANYWHERE.



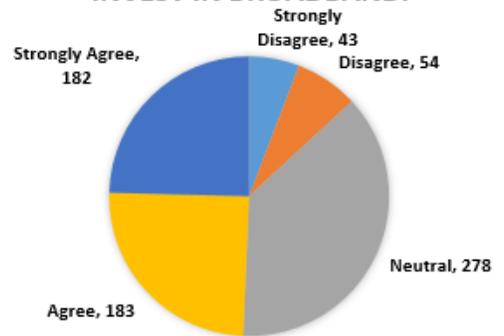
MONITOR AND STREAMLINE THE DEVELOPMENT PERMITTING PROCESS.



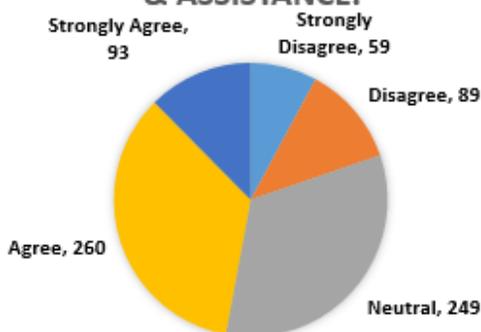
ACTIVELY RECRUIT TARGETED BUSINESS PROSPECTS.



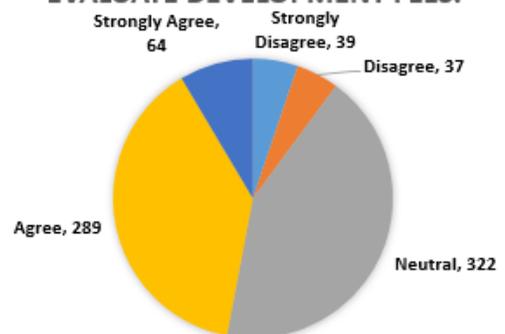
INVEST IN BROADBAND.



PROVIDE ENTREPRENEURSHIP TRAINING & ASSISTANCE.

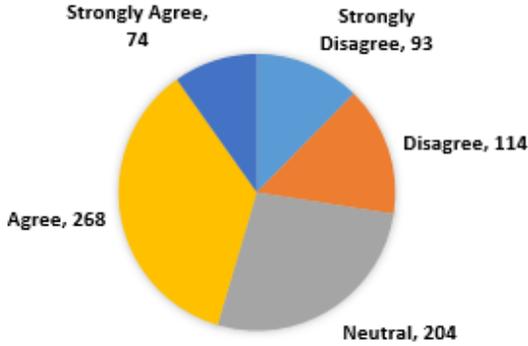


EVALUATE DEVELOPMENT FEES.

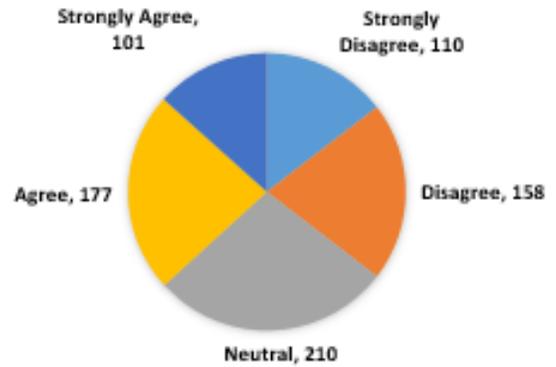


Q14 ... what Dare County and local government should do as local economic development policies and strategies. (continued) Local government should:

INVENTORY AVAILABLE LAND FOR DEVELOPMENT.



PROVIDE FINANCIAL INCENTIVES TO ATTRACT NEW BUSINESS DEVELOPMENT.



Q15 To address affordable housing issues, I would support the dedication of more time and resources to...

Invest in a public land trust (publicly owned land that will be developed to provide more affordable housing in an area of need).

Support zoning (or rezoning) of land to higher density if affordable housing is included in development.

Invest in staffing or outsourcing to develop affordable housing.

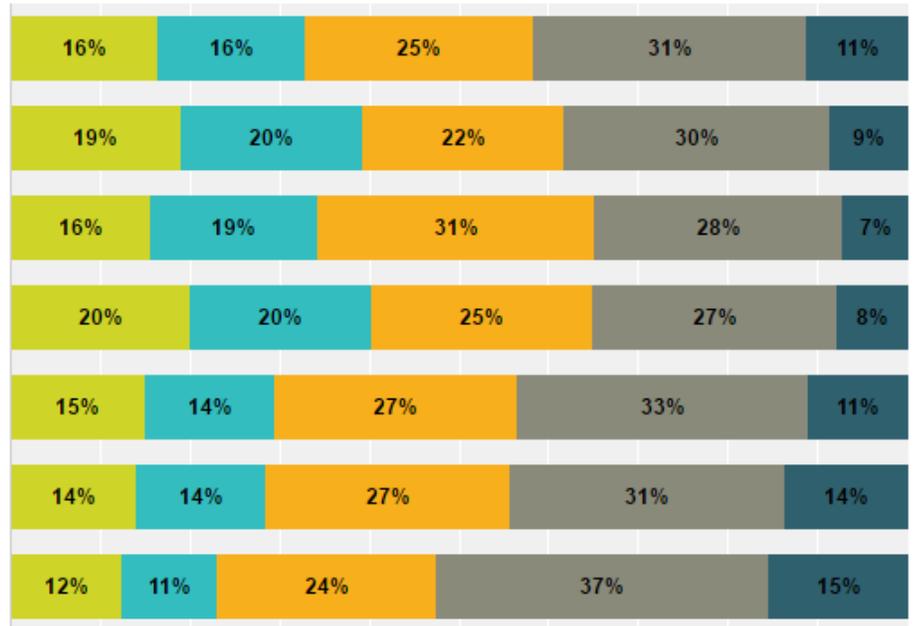
Support increase tax incentives for affordable housing.

Invest in non-profits to develop and build affordable housing.

Approve development of more rental housing.

Invest in infrastructure required for affordable housing.

Strongly Disagree ← Strongly Agree

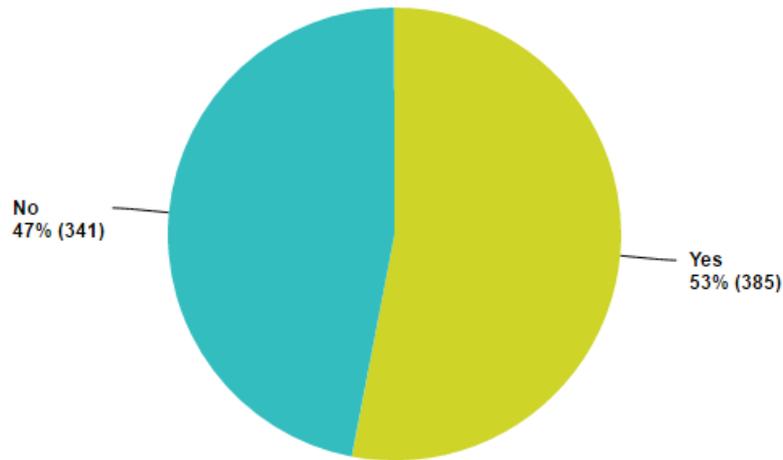


0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

Strongly Disagree Disagree Neutral Agree Strongly Agree

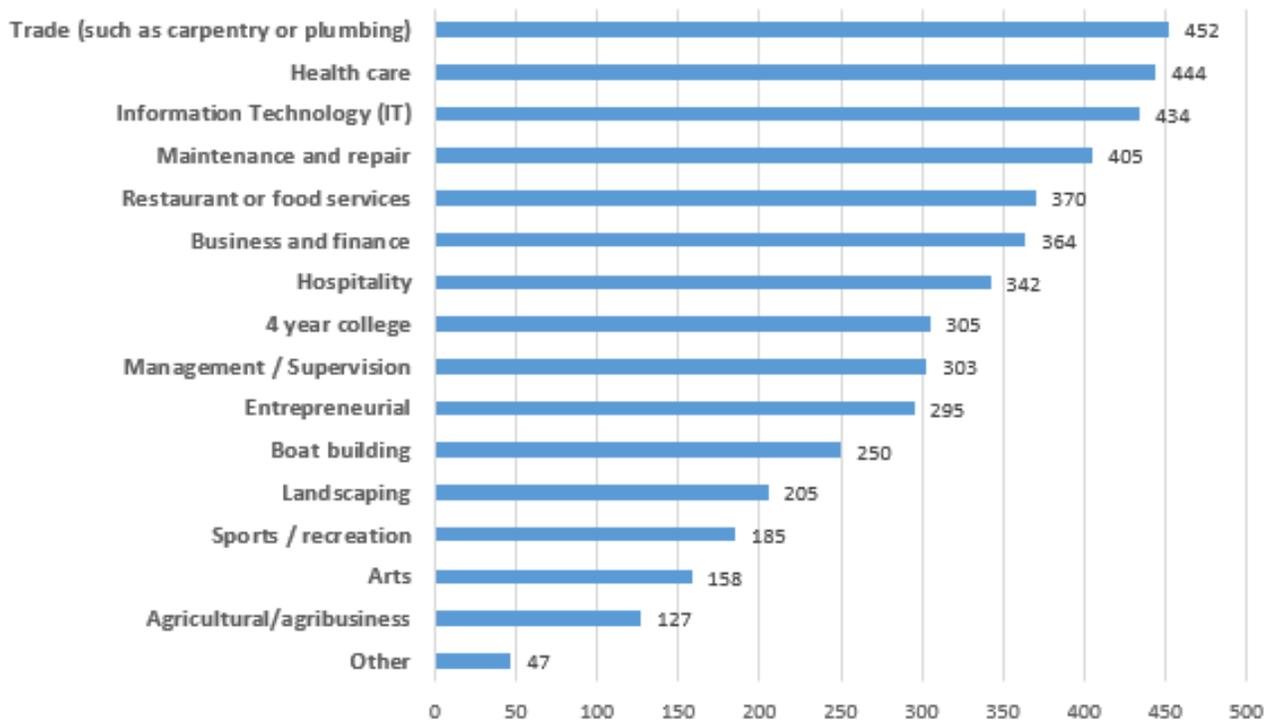
Q16 Would you support the county implementing a penny tax to address the affordable housing issue? (The impact of such a tax would be approximately \$30/year on a \$300,000. property.)

Answered: 726 Skipped: 161



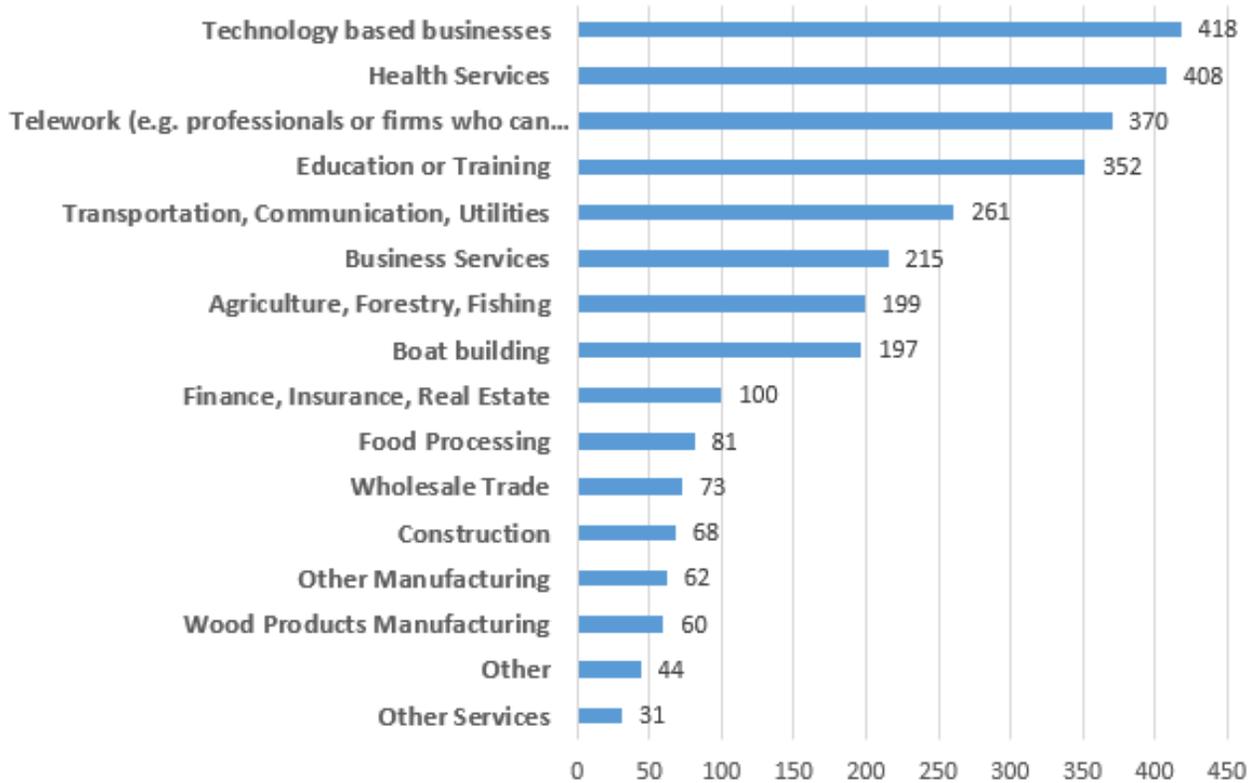
Q17 What types of job training or education would be most helpful?

Answered: 734 Skipped: 153



See separate Appendix E for a complete listing of 47 “Other” written responses.

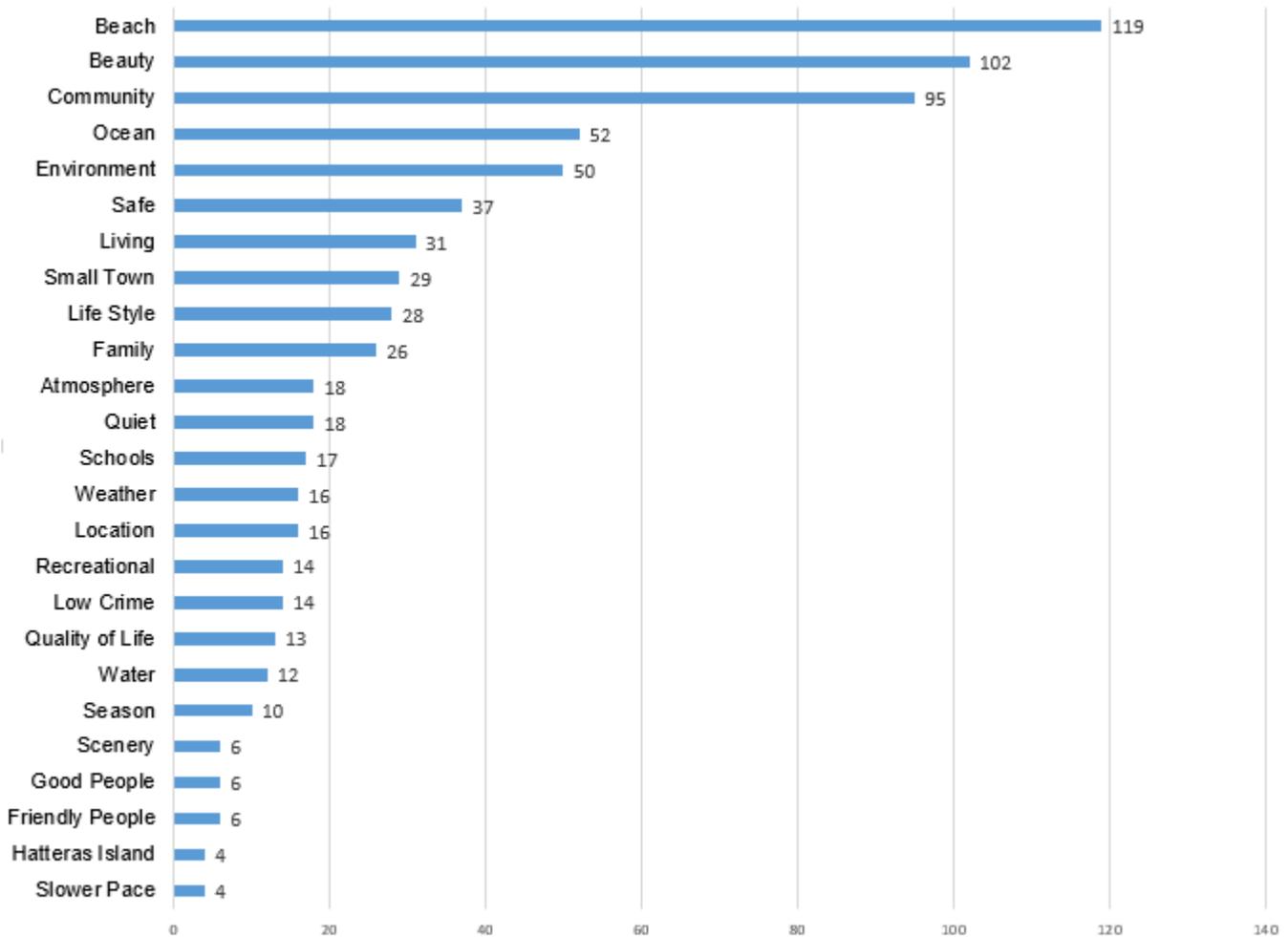
Q18 If local government was to try to recruit new business into the County, what types of business should the government work to recruit?



See separate Appendix F for a complete listing of 44 “Other” written responses.

Q19 What do you like BEST about living in Dare County?

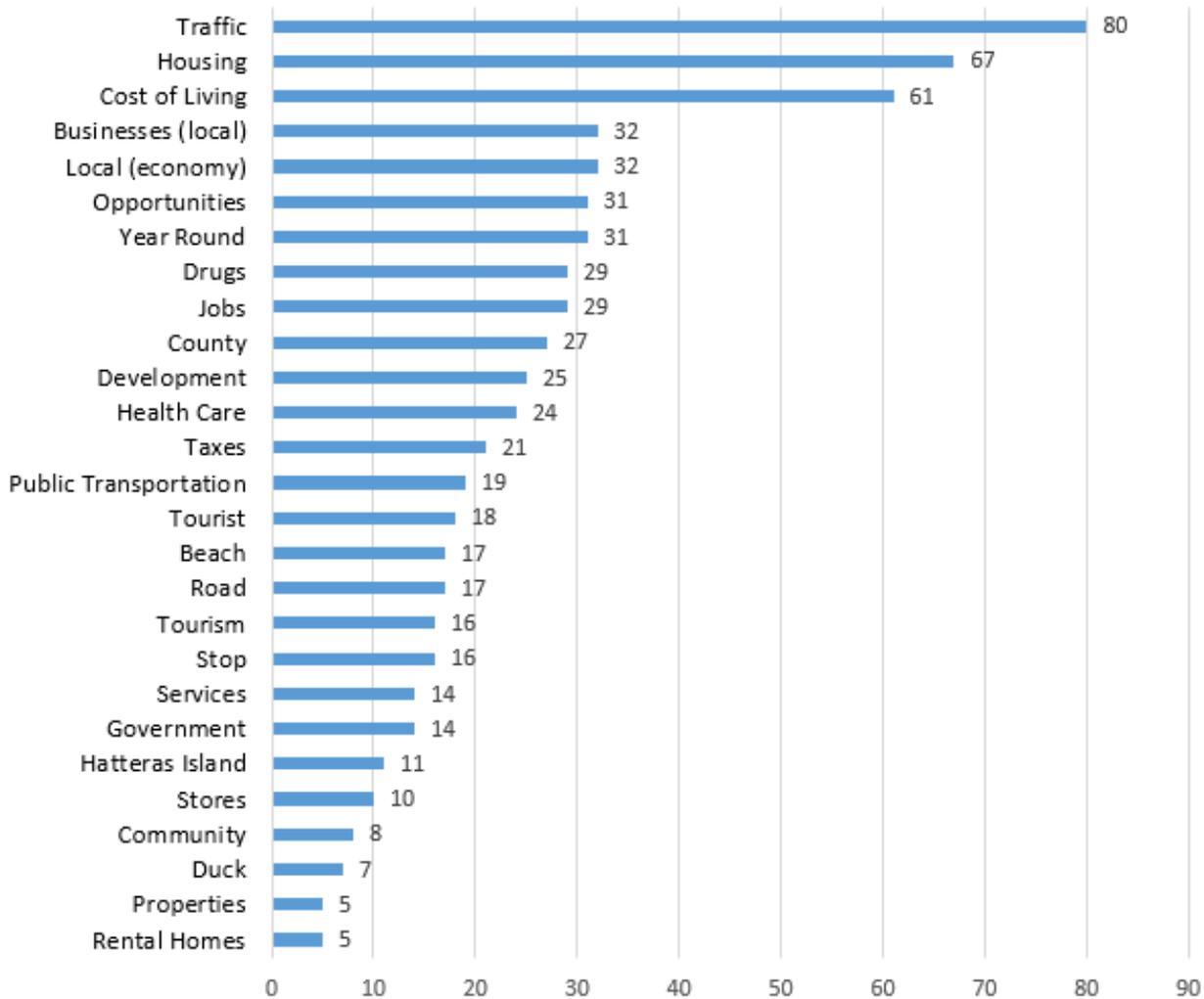
Atmosphere Hatteras Island Family Scenery
 Small Town Friendly People Safe Water Ocean
 Recreational Beauty Weather Beach
 Location Community Low Crime
 Environment Quality of Life Living Season
 Life Style Good People Quiet Slower Pace Schools



See separate appendix G for a complete listing of all 674 written responses.

Q20 What would you like to CHANGE about living in Dare County?

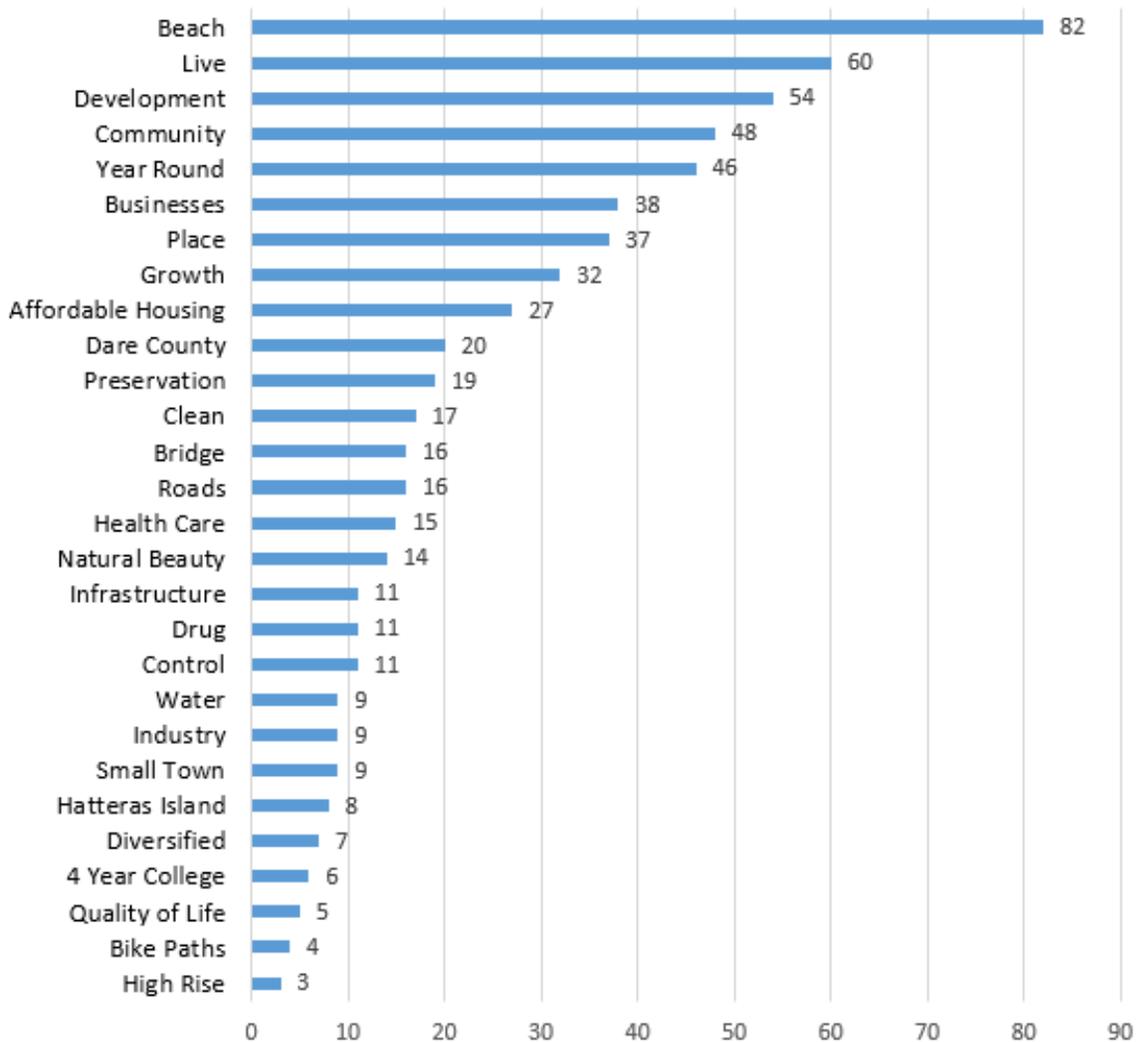
Public Transportation Rental Homes Health Care
 Community County Hatteras Island Jobs Government
 Year Round Stop Local Road Housing
 Tourist Traffic Beach Cost of Living
 Tourism Businesses Services Opportunities
 Stores Drugs Duck Development Properties Taxes



See separate Appendix H for a complete listing of all 665 written responses.

Q21 What is your vision for Dare County 15 years from now?

Bridge Bike Paths **Clean** Year College **Dare County**
Hatteras Island **Growth** Industry **Businesses**
Infrastructure **Community** Control **Live**
Natural Beauty **Beach** Drug
Development Small Town
Year Round Water **Place** Diversified
Affordable Housing Quality of Life
Preservation High Rise **Roads** **Health Care**



See separate Appendix I for a complete listing of all 625 written responses. A listing of substantive responses to Q21 “Vision” follows on the next page.

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Q21 What is your vision for Dare County 15 years from now? (Selected responses)

Answered: 625 Skipped: 262

The following is a list of 24 (out of 625) substantive responses to the question of their "Vision" taken from Appendix I. The numbers preceding the response refers to the responses as there were numbered in Appendix I.

29 Dare Country will be a more diversified economic base providing a greater year round population less dependent on tourism, with more advanced health care facilities to encourage more retirees to locate here and be able to comfortably stay here. We must develop more middle class jobs rat Can afford the higher cost of living in Dare. The diversification will also lead to a more reasonable tax base, i.e. affordability for all.

42 That we accept who and what we are and be the best at that; we are a beautiful vacation destination and home to those who have the grit and determination to find a way to live on this barrier island; lets focus on doing what we do best, which is providing hospitality to people who love OBX as much as we do.

55 Better transportation, beginning to address sea water and ground water level increases, shift to re-purpose some percentage of large house vacation rentals to B & B or Guest house type rentals with on-site management to diversify rental accommodations and allow- encourage more year-round visitation by smaller more autonomous groups like couples and singles. An emphasis on creating neighborhoods that lessen the need for vehicular traffic, and a continued and sharpened focus and emphasis on encouragement and promotion of year round visitation based on the natural environment, various popular events, the arts, education, seminars and the like.

89 To keep what serenity we have left and curtail unneeded "development" that erases the obx character that lured folks here. Unfortunately not sure that can be done because northerners with their \$\$ don't understand the character of this place. I can say that as I married a "damn Yankee" who says he will never leave here, lol!

185 My ideal is that there are more job opportunities that are not tourism driven, more green spaces, parks and public areas, a state of the art health care facility/hospital and educational opportunities for our children that include cutting edge research of our oceans and beaches. I envision a county that has made sustainable, environmentally friendly development a cornerstone of its planning and permitting. This would be reflective in the preservation of community access to the sound and ocean as well as in multiple green spaces where concerts, farmer's markets and events are held as well as parks, paths and trails open to the public and maintained/taken care of.

251 Jetty North of Oregon Inlet, finalize the highway system for HWY 64 and give large shipping companies the ability to use the inlet, you will have growth throughout Dare and Hyde Counties. Provide incentives to boat builders and the recreational fishing community will come back to this area and rent our homes more than ever. It all has to do with both the Oregon and Hatteras inlets being so dangerous that boats and boat building companies are leaving and not coming here

252 Dare county is a service community built on the dollars of tourists. The community should be built to support an active outdoor lifestyle for 300,000 people. There is a good opportunity to bring in higher education and telecommuting or tech jobs to stabilize the seasonality of employment opportunities.

262 A thriving middle class, with a stable year-round workforce. A four year college to bring students to Dare County for education, along with the financial gain to the county and its private sector. I would also like to see the county government look to promote ways for the private sector to build and operate affordable housing, with incentive based programs.

302 A municipality that excels in consistent quality of services to full-time residents, that maintains a significant domain of natural areas and environmental buffers, that is has encouraged and implemented commercial/tourist industry that provides fair paying employment and a world class vacation experience.

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339 Integrated approach to redevelopment, including a coordinated transportation initiative that promotes and encourages our scenic beauty and healthy lifestyles. Ultimately develop Dare County into a place where our children could return to live work and compete in the regional, national, and global marketplace

344 Maintain present culture, charm and natural beauty and attract development that is consistent with Hatteras culture and history. I think we could support more telecommuting, training/conference/education centers, and active retirement as well as maintain the traditional occupations of the island.

349 A balanced economy that returns to its roots to re-build its residents' lives...affordable housing, less empty vacation mega homes, more clean safe residential communities with healthy small business. By the way, government and big vacation rental companies are not local small business. Public transportation, NO manufacturing, clean safe healthy environment. Politicians who are invested in the people, not monies in real estate.

376 Low key tourism (like we currently have) along with an out of season job market so that work is not seasonal and affordable housing so local jobs are not being filled by transient labor. Seriously better quality healthcare so that days are not spent in transit to cities hours away in search of quality services

414 I'd like for us to maintain the natural beauty, consider reasonable limits on development/overdevelopment. I'd like for there to be job and career opportunities for our young folks, so when they complete college or their education they can stay here with decent paying jobs.

420 Transformation of blighted commercial properties, promotion of event sites for visiting organizations, and promotion of "continuing education" by the school systems -- not just to include college, but to advance to any type of trade or service that will result in successful, independent adults

424 Less generic, less building, we need to showcase the true obx to make it a unique experience. it is becoming less unique and too expensive for the average family. So an accessible experience so the visitor has \$\$ to spend on other activities rather than sitting on their 20 bedroom house with 30 relatives. Thank you.

430 The density of development in the County will look much like it does today with the addition of more affordable housing for working families. The beaches will continue to be maintained and improved both for their economic value and storm damage protection. The County will have begun to address the issue of sea level rise and adapted waste water systems and transportation corridors to meet the threat. The community will continue to enjoy economic progress based largely on tourism but the economy will have expanded to provide well paid jobs in other sectors such as IT.

441 Smart growth, small government and a strong focus on maintaining and enhancing the tourism industry. We all get to work and live here because of the tourism industry and anyone who thinks that can be replaced by anything is wrong. We can bring in other industry to enhance what we already have but in the end, it is tourism and those industries that support tourism that will keep the economy strong. We must not forget that and need to always support it

517 I would like it to continue to be a safe place to live. I would like to see more year-round jobs which would hopefully, help the economy, therefore improving the socio-economic level of the people of the community. Thus encouraging less crime and drug-use and encouraging more education and prosperity.

557 Throttle back on development. It seems every green space is being sacrificed to build something on. These "event homes" are a blight on the beach and towns that managed to keep them out of their community (Nags Head and Southern Shores) are starting to lose their battle to control the character of their towns.

573 Hopefully far more involvement in regional planning for housing, expanding beyond tourism and service/real estate jobs, offsetting the influx of retirees with younger citizens, fixing the weekend traffic chokepoint at 158/12 and most important, if the traffic chokepoint is fixed, working with lower Currituck to establish a housing/retail/business corridor for non-tourism related businesses to thrive and house workers.

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584 I know that tourism is very important to our area but I would like to see Dare County to start working with our community groups and non profit groups to keep this a safe place to live and then more year round families and business to come and STAY in this area

590 Affordable housing availability, increased health care availability, increased job and educational opportunities, lower property taxes, more affordable insurance of all kinds, decrease in illegal drug use and availability, more transportation/travel options for safer roads and an overall safe place to live and visit.

616 A place that is able to maintain a relaxed lifestyle and small town feel, while continuing to grow a robust tourist economy. In conjunction with tourism as a base for our economy, boatbuilding and fishing are two areas that we should be able to expand. Within that timeframe, I would like to see CSI continue its role as a cutting edge research facility, but also expanding its teaching mission to include year around students on its campus.