NORTH CAROLINA HURRICANE RECOVERY AND IMPACT

November 12, 2019
Coastal Region Commercial Supply & Demand (rolling 12 month)

Rolling 12-month growth since January 2016:
+12% Demand
-4% Supply
Coastal Region Commercial Supply & Revenues (rolling 12 month)

Rolling 12-month growth since January 2016:
+28% Revenues
-4% Supply
Cause of Increased Revenues: Demand or ADR?

Commercial properties only
Hurricane Dorian Perception Research Summary

- Mostly unclear perception of lingering damage among specific NC coastal destinations
- Some perception (10%) that extensive damage from Dorian remains along coast in general
- Nearly half of respondents perceive “some” damage remains
- Some perceptions are inaccurate
- No significant differences found between primary and secondary market perceptions
- Little impact on future travel to NC or NC’s coast specifically
Perception of the current state of destination recovery from Hurricane Dorian

<table>
<thead>
<tr>
<th></th>
<th>Back to Normal</th>
<th>Some damage remains</th>
<th>Extensive damage remains</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>NC Coast in general</td>
<td>23.5%</td>
<td>45.0%</td>
<td>10.3%</td>
<td>21.2%</td>
</tr>
<tr>
<td>Wilmington</td>
<td>22.3%</td>
<td>37.1%</td>
<td>6.5%</td>
<td>34.1%</td>
</tr>
<tr>
<td>Crystal Coast</td>
<td>20.0%</td>
<td>37.3%</td>
<td>11.0%</td>
<td>31.7%</td>
</tr>
<tr>
<td>Outer Banks/Dare County</td>
<td>17.3%</td>
<td>39.5%</td>
<td>12.6%</td>
<td>30.6%</td>
</tr>
<tr>
<td>Ocracoke Island/Hyde County</td>
<td>17.9%</td>
<td>25.2%</td>
<td>10.8%</td>
<td>46.1%</td>
</tr>
<tr>
<td>Brunswick Islands</td>
<td>18.5%</td>
<td>28.7%</td>
<td>7.1%</td>
<td>45.7%</td>
</tr>
</tbody>
</table>
Primary vs. Secondary Market Perceptions

Perception of "Extensive Damage Remaining"

- NC coast in general
- Wilmington
- Crystal Coast
- Brunswick Islands
- Outer Banks/Dare County
- Ocracoke Island/Hyde County

Bar chart showing the perception of extensive damage remaining in different areas, categorized by primary and secondary markets.

Legends:
- Total
- Primary market
- Secondary market
## Impact on Planned Travel to NC

Of the 23% of respondents currently planning travel to NC, did Hurricane Dorian impact your plans?

<table>
<thead>
<tr>
<th>Response</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>No, the places I plan to travel to were not affected</td>
<td>48.3%</td>
</tr>
<tr>
<td>No, the places I plan to travel to are/will be recovered by the time I want to go</td>
<td>26.6%</td>
</tr>
<tr>
<td>Yes, I chose another destination in NC</td>
<td>14.7%</td>
</tr>
<tr>
<td>Yes, I postponed my trip, but will still go to my original destination</td>
<td>10.5%</td>
</tr>
</tbody>
</table>
Did Hurricane Dorian impact any of your previously planned trips to NC this year?

<table>
<thead>
<tr>
<th>Impact on Past Travel to NC</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>No, I did not have any previously planned trips</td>
<td>78.6%</td>
</tr>
<tr>
<td>No, I kept my trip the same</td>
<td>17.4%</td>
</tr>
<tr>
<td>Yes, I postponed my trip</td>
<td>1.9%</td>
</tr>
<tr>
<td>Yes, I cancelled my trip</td>
<td>0.6%</td>
</tr>
<tr>
<td>Yes, I moved my trip to another location within NC</td>
<td>1.0%</td>
</tr>
<tr>
<td>Yes, I moved my trip to another location outside of NC</td>
<td>0.4%</td>
</tr>
</tbody>
</table>
### Impact on Future Travel

What impact has Hurricane Dorian had on your interest in traveling to NC?

What impact has Hurricane Dorian had on your interest in traveling to the NC coast?

<table>
<thead>
<tr>
<th></th>
<th>Has not impacted my interest in traveling to NC coast</th>
<th>Has increased my interest in traveling to NC coast</th>
<th>Has somewhat decreased my interest in traveling to NC coast</th>
<th>Has significantly decreased my interest in traveling to NC coast</th>
</tr>
</thead>
<tbody>
<tr>
<td>NC</td>
<td>82.4%</td>
<td>6.7%</td>
<td>9.9%</td>
<td>1.0%</td>
</tr>
<tr>
<td>NC Coast</td>
<td>78.8%</td>
<td>9.2%</td>
<td>10.5%</td>
<td>1.5%</td>
</tr>
</tbody>
</table>
$50K investment
5.2 million impressions
Oct - Nov
NC landing page
Video display
Display banners
Native marquee
Dorian Recovery Support | Expedia

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Native marquee
23 Practical Things For People Who Are Always Traveling

Whether you're OOO on a weeklong vacation or getting away for a short weekend, you might find yourself reaching for these items every single time.
21-Year-Old Holds The Record As The Youngest To Visit Every Country In The World

Her adventures around the world have earned her an impressive 260K Instagram followers, and in May 2013, Lexie stepped foot in North Korea which marked her 195th country visited. Just take a second to think about how impressive visiting 196 countries in 21 years is, more than half of which were visited in the last three years. Here’s how she managed it...

How It Started

Lexie Ahlford (Instagram @LexieWildCredit) says she started saving for her goal at the age of 12. The goal was to visit all 196 sovereign nations on earth, and on her blog she writes that she beat the Guinness World Record for Youngest Person to Travel to Every Country by over three years.
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