

Tourism Impacts and Second Home Development in Brunswick County: A Sustainable Approach

Summary Report



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Background and Context of Study

Tourism has the capacity for substantial economic, environmental and social benefits and costs and its effects, positive and negative, can be felt even more in tourism dominated destinations affected by a substantial presence of second-homes. This study has combined the more traditional look at tourism's impacts on fulltime resident perceptions of overall community quality of life with the emerging interest of a number of stakeholder groups on better understanding the contrast of these perceptions with those of second home owners. Thus, the target population for this study is single family unit property owners, both resident and non-resident second home owners.

Generically, to be successful in tourism, a community or region must be able to capture and maintain the interest of potential visitors, provide reasonable access and basic human services, meet needs for safety and security, and demonstrate relatively intense levels of hospitality. To develop a tourism industry that is both successful and sustainable requires careful consideration of five main components¹. These components include: (1) *tourism resources*, (2) *traveler services*, (3) *infrastructure*, (4) *tourist markets*, and (5) the concerted effort to accommodate the needs of the *host community*.

Tourism resources may be defined as natural and man-made, scenic, scientific, cultural, historic, and recreational attractions and amenities, as well as interpretive, educational, and recreational programs and special events that are managed specifically for use by various publics. *Traveler services* provide the visitor with accommodations, food and beverage, modes of transportation (bus, taxi, train, aircraft, boat and bicycle), shopping, access to emergency care, information about the area, and friendly and knowledgeable assistance. *Infrastructure* means suitable utilities (water, sewer, and electric), communication, and transportation access such as roads, airports, railways, and waterways. *Tourist markets* are the consumers (and users) of the tourism product. Understanding who the potential visitors are, where they come from, what they are interested in seeing and doing and how much they are willing to pay for these experiences are important visitor characteristics that can be often overlooked. Knowledge of existing and potential tourist markets will greatly improve an area's chances for success.

Finally, and most important for this study, is the *host community or region*. Developing a tourism industry directly and indirectly affects the entire community. Both tourism and non-tourism businesses as well as the local citizenry all have the potential of being positively or negatively impacted as a result of tourism, and thus play a key role in the industry's success. In addition, the quality of the host-guest relationship plays a major part in determining the overall quality of the visitor's travel experience and his or her perception of the community. For tourism to succeed, efforts must be made to contribute to, rather than disrupt, the local quality of life. Taking all five of these components into account is essential when developing tourism in order to ensure a successful and sustainable tourism industry.

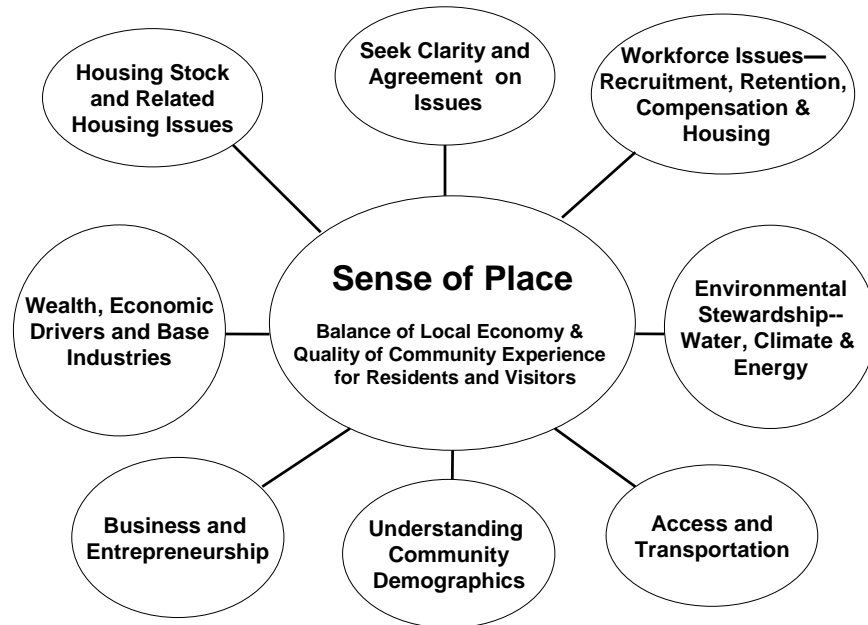
As popular tourism destinations evolve from providing general tourism products and services to also becoming desirable second home destinations, particularly where there is high end real estate development, important planning, policy and management issues must be addressed. Less coverage has been given to date on understanding second homes as an economic driver, on the extent to which second home owners and local residents share common recreational interests and similar lifestyle values, on understanding the long-term implications of second homes on the need for services for workers and their families, on the extent of the understanding of, and expectations for, economic, environmental and socio-cultural sustainability, on the effects of climate and weather on location decisions and recreational pursuits and on the implications of the conversion of second homes to permanent residences on the type and extent of local governmental and non-governmental services. Additionally, little is understood about

¹ See "Organizing Resources for Tourism Development in Rural Areas" accessible at: <http://www.ecu.edu/cs-acad/sustainabletourism/Rural-Tourism.cfm> under Organizing Resources.

the implications of “super-sized” second homes and the impacts of extreme wealth on a resort destination².

A number of factors that need to be addressed in second home communities (see Figure 1), consistent across most, affect what such places become. These factors influence the quality of community experience that can be provided for both residents and visitors. Included among these factors are 1) the influence of wealth and the understanding of a community’s economic drivers and base industries; 2) the region’s demographic characteristics and trends; 3) the availability and affordability of local housing stock; 4) the ability to recruit, compensate, house and retain a workforce; 5) access to and from, and consequently, movement of people throughout the community and immediate region; 6) the extent to which business and entrepreneurial behaviors are encouraged and serve the needs of the community and workforce; 7) the degree of environmental stewardship the community embraces regarding water, climate, energy and land use; and 8) the ability of residents to clarify and seek agreement on community issues and solutions. Decisions regarding these issues will only be effective if based upon an accurate understanding of the second home economy and the amenities that needed to serve second home residents and the workers who in turn serve them.

Figure 1: Factors to Consider in Second Home Destinations



Patrick Long, Center for Sustainable Tourism

This research was conducted with single family unit property owners, both resident property owners and non-resident second home owners, to determine their perception and attitudes of tourism and its relationship with six dimensions of community life; to assess attitudes towards the community affects of second home development; to identify property owners’ perceptions of the importance of sustainable actions on future economic success; determine the manner and extent that climate and weather impacts residential property and recreational decisions; compare differences regarding impacts, benefits, and future support for tourism; and to assess the degree of community attachment and the factors that produce that attachment.

² See “Rural Tourism and Second Home Development” in Handbook of Tourism and Quality of Life Research, Springer Publishers & the International Society for Quality-of-Life Studies (in press).

Introduction

Places of natural beauty throughout the United States that provide an array of amenities frequently become highly desirable places to live, vacation, and own a second home. Often, the impacts of tourism and second home development, both positive and negative, dominate decisions regarding the destination's economy, environment and community culture. At the forefront of such a tourism-oriented economic structure can be issues relating to land use, real estate prices, cost of living, transportation, business diversification, workforce, housing, water and the environment, among others. Elected officials, public managers, developers, business owners and operators and residents in such tourist-based communities are typically seeking information to understand, estimate, and manage the changes they are facing and thus contribute to the long-term sustainability of their communities.

Brunswick County, North Carolina, is just such a place. It is structured to support the tourist orientation and demand, particularly as they relate to 1) **construction**, where homes and businesses have been built to meet the needs of the ever-growing visitor and retiree population; 2) **retail trade**, including souvenir and clothing shops to grocery stores; 3) **real estate**, rental and leasing, including the sale of second homes and rental of beach and vacation houses; and, 4) **leisure and hospitality services**, to meet the recreation, accommodations, and food service needs of both residents and visitors.

Brunswick County is known throughout the southeast for its natural beauty blended with a warm year-round climate along with its superior vacation and outdoor creational opportunities. Brunswick boasts seven beach resorts including Sunset Beach, Holden Beach, Caswell Beach, Ocean Island, Calabach and Bald Head Island, each of which possesses its own unique charm. These water bodies provide vacationers as well as residents wonderful recreation opportunities such as boating, jet skiing, dolphin excursions, sport fishing and surfing. There are also 39 impeccably maintained golf courses in Brunswick County. Many of them are located adjacent to rivers and lakes that provide beautiful but challenging play. Other outdoor activity offerings include fishing, canoeing and kayaking along the rivers and lakes; tennis, hiking along the numerous nature trails; or exploring the three lighthouses along the beautiful coast. (Information secured from: <http://www.brunswickedc.com/Home/QualityofLife/tabid/570/Default.aspx>).

East Carolina University's Center for Sustainable Tourism (CST) strives to link data to economic and community decision-making and to help North Carolina stay competitive. With funding from North Carolina Sea Grant, the CST conducted a study during the spring 2011 to assess the perceptions of full time resident and second home property owners on the impacts of tourism and second home development on Brunswick County. In addition, these property owners were asked to assess the importance of a set of sustainable actions to the future economic success of the county as well as to determine the manner and extent that climate impacts property values and personal recreational decisions.

Objectives of the Study

This North Carolina Sea Grant funded study is designed to help stakeholders estimate, understand and manage the changes in their communities resulting from tourism. The study results are intended to aid in effective decision-making that will contribute to the long term economic, environmental and socio-cultural sustainability of these communities.

Objectives: The research team set out to accomplish the following objectives with this study:

- Objective 1:** Assess fulltime resident property owners' and second home property owners' perceptions of the impact of tourism on community land use, the economy, service provision, cultural opportunities, infrastructure and general quality of life;
- Objective 2:** Profile economic value of second homes documenting by number, type and value;
- Objective 3:** Identify perceptions of the importance of sustainable actions on future economic success;

- Objective 4:** Determine how climate and weather impacts resident and second home owners' property and recreational decisions;
- Objective 5:** Compare differences between second homeowners and resident property owners regarding tourism's impacts and benefits, as well as future support for tourism;
- Objective 6:** Compare assessment of community attachment and the factors that produce that attachment.

Methodology³

The Geographic Information System (GIS) Tax Records of Brunswick County provided a list of the county's housing stock from which a sample was selected of both resident and second home property owners. Members of this sample were then sent a cover letter inviting them to visit the study's website, insert a participant code number and complete a questionnaire. Participants were also offered the option of a printed copy or a telephone interview. The sample includes 2,457 second home property owners and 2,511 full time / permanent property owners. Four hundred thirty-five (435) useable questionnaires were completed⁴ (45% second home owners and 55% of full time / permanent property owners).

Background Information

The county's GIS data base was also used to categorize the housing stock of Brunswick County by total number of housing units, value and ownership. For example, of the 6,116 single family houses in the \$200,000 to \$299,999 price range, only 31% are second homes; in the \$600,000 to \$699,999 housing price range, 75% or 999 units are second homes; in the \$700,000 to \$799,999 housing price range, 77% or 697 units are second homes; in the \$800,000 to \$899,999 housing price range, 75% or 383 units are second homes; in the \$900,000 to \$999,999 housing price range, 74% or 195 units are second homes; and in the \$1 million and over housing price range, 80% or 739 units are second homes.

Regarding land use, the County GIS data base reports a total of 389,414 acres of wooded area, 58,637 acres of residential, 28,573 acres of agriculture, 2,127 acres of Commercial, 8,410 acres of outdoor recreation, 36,950 acres of water, 19,769 of wetland marsh and 1,452 acres of manufacturing land in Brunswick County.

Profile of Respondents

Of the 435 respondents the majority are in the 45-74 age range (81.6% of second home owners and 77.4% of full-time residents) with the largest number of second home respondents falling into the 55-64 age category (40.8%) and full-time resident respondents falling into the 65-74 age category (33.9%). Over 94% of the comparison groups are Caucasian. Approximately 52% of second home owner respondents are female and over 52% of full time resident respondents are males. Over sixty-five percent of the second home owners and 58% of the full time home owners have at least a college degree. When annual household income level reaches \$150,000 or above, second home owners show greater income at all levels. For instance, within the \$150,000 to \$199,999 income range, 12.2% of the respondents were second home owners compared to 3.8% of resident home owners. Over 50% of both groups reported being retired while 56.4% of second home owners and 46.3% of full time residents reported they no longer had children at home.

³ Although the specific reasons that might lead to any difference was beyond the scope of this study and would have been predictably unsuccessful to capture due to the necessary length of such a questionnaire, this current information becomes the starting point for a more qualitative assessment and/or a follow-up with respondents.

⁴ Although 453 questionnaires (9.1%) contained some information only 435 (8.75%) were completed to the point where the information was useable for this analysis.

Full time residents indicated they chose to live in Brunswick County due to the climate (60.8%), scenery (43.7%) and affordability compared to other coastal areas (42.1%); in addition, 50% indicated they would retire or have retired to Brunswick County.

When asked “Why did You Buy Your Second Home Property in Brunswick County,” second home owners most frequently indicated the beach (84%); investment value (44.8%); recreational opportunities (44.4%); friendliness of the area (43.6%); affordability of the area (43%) and general climate (41.8%). When asked “How Do You Intend to Use Your Second Home Property in 5 Years?,” 57.4% said they would maintain current use while 35.6% said they would increase personal use; 18.9% said they would retire to it full time, while 14.7% said they would rent it part time while 8.8% would like to sell if possible.

Relationship of Tourism to Community Life

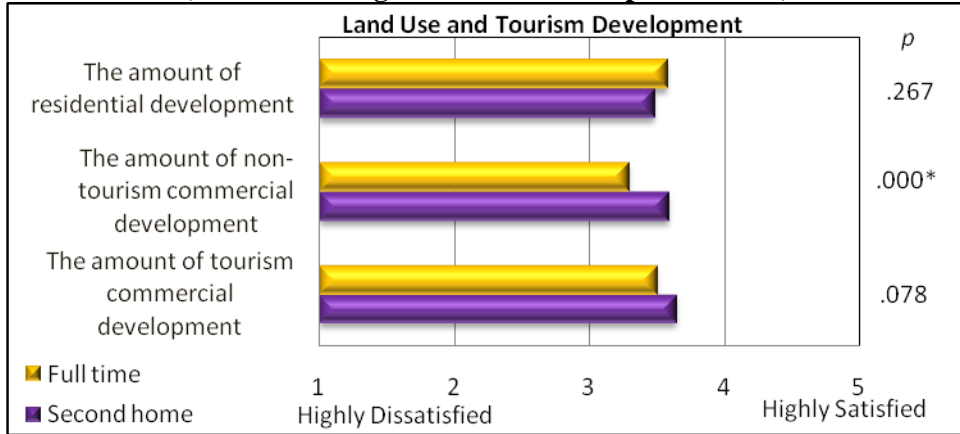
Study participants were asked to indicate their level of satisfaction with the relationship of six dimensions of community life and tourism development. These six dimensions included land use, the economy and jobs, government services, cultural offerings, infrastructure and quality of life. The response categories included a range of Highly Satisfied to Highly Dissatisfied. The questions in these six categories were designed to determine if a difference existed between the two groups and the extent of the significance⁵ of any difference.

1. Land Use and Tourism Development

In this series of questions, respondents were asked to indicate their level of satisfaction with land use as it relates to tourism development for their community. Full time resident property owners and second home property owners showed similar levels of satisfaction with the “amount of non-tourism commercial development” and “residential development.” For the amount of “non-tourism commercial development” there was a statistically significant difference between the level of satisfaction expressed by full time resident property owners and that expressed by second home owners. Second home owners showed a greater level of satisfaction at a statistically significant level than did full time residents regarding the “amount of non-tourism and tourism commercial development.”

⁵ The term “statistically significant” will be used frequently throughout this document. Statistically significant means that 95 out of 100 times the results reported between fulltime resident property owners and second home owners are predictably different. Thus, .05 is the threshold used for the confidence level, a typical standard in scientific research.

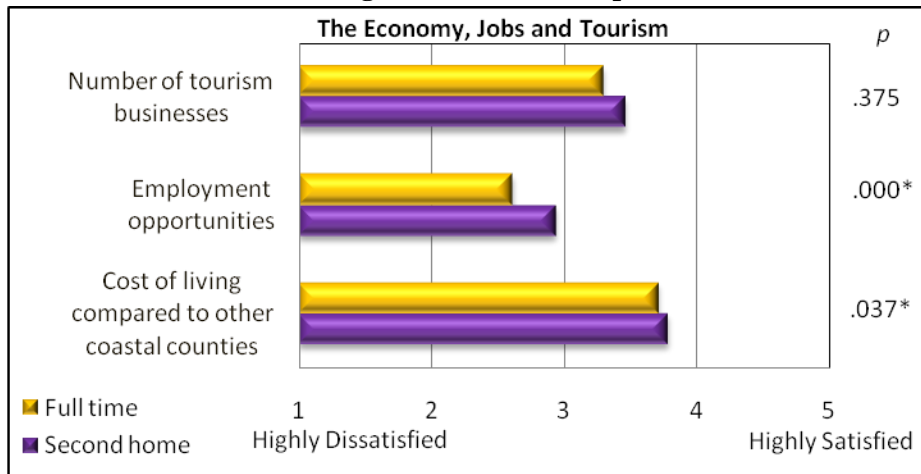
(* indicates a significant relationship at .05 level)



2. The Economy, Jobs and Tourism

In this series of questions, respondents were asked to indicate their level of satisfaction with the economy and jobs as they relate to tourism development for their community. For two variables in this category there was a statistically significant difference between the views expressed by resident property owners and those expressed by second home owners. Second home owners expressed greater satisfaction at a statistically significant level with “employment opportunities” and “cost of living compared to other coastal counties” than did full time resident property owners. Full time residents share similar views with second home owners in terms of the “number of tourism businesses” in Brunswick County.

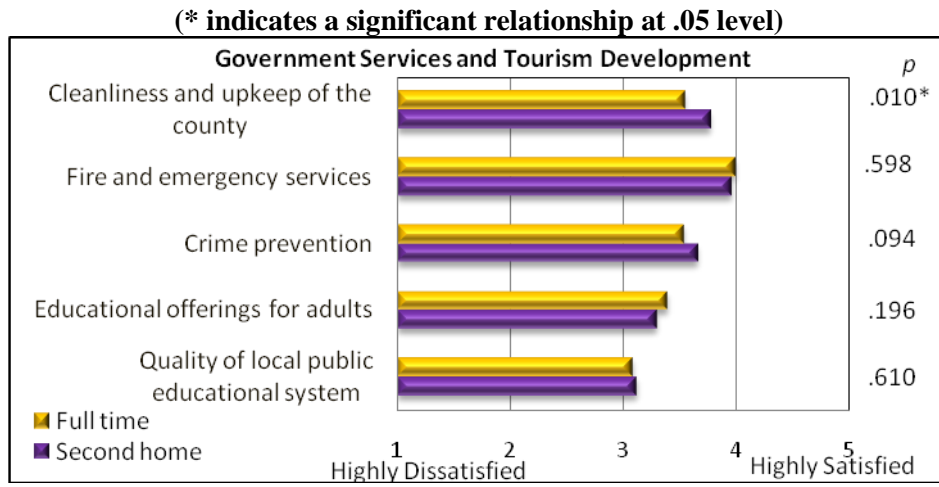
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3. Government Services and Tourism Development

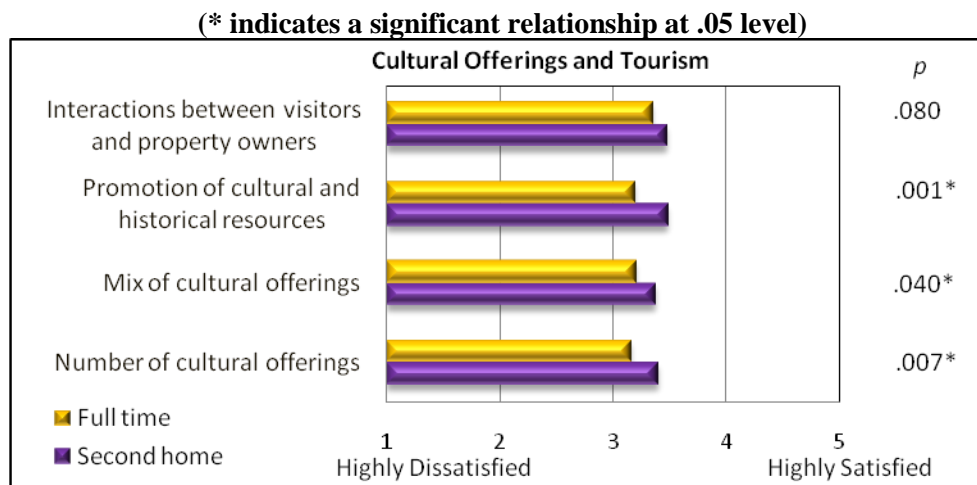
In this series of questions, respondents were asked to indicate their level of satisfaction with the relationship of government services to tourism development for their community. For one of the five questions in this category there was a significant difference between the views expressed by resident property owners and those expressed by second home owners. On the questions relating to tourism and “cleanliness and upkeep of the county,” second home owners expressed greater satisfaction at a significant level than did full time resident property owners. There was no statistically significant

difference among the two groups on the questions of “fire and emergency services,” “crime prevention,” “educational offerings for adults” and “quality of local public education system,” which means their opinions on these items are in agreement.



4. Cultural Offerings and Tourism

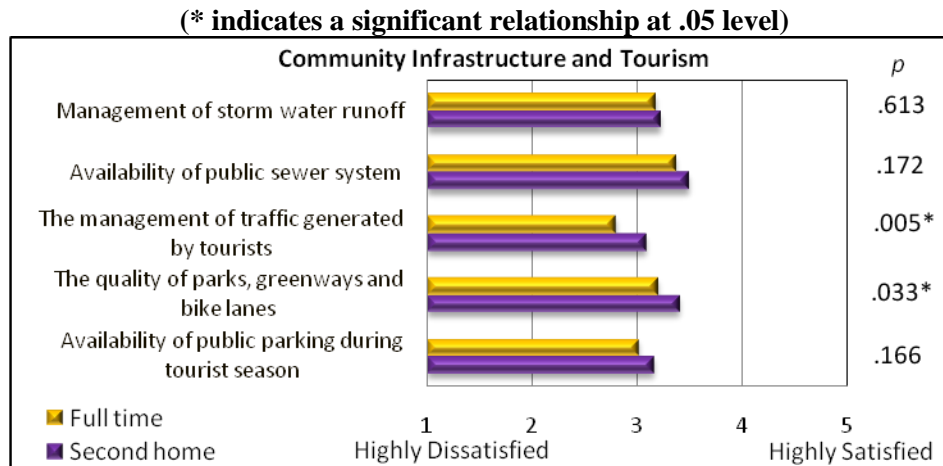
In this series of questions, respondents were asked to indicate their level of satisfaction with the relationship of cultural offerings to tourism development for their community. For three of four questions in this category there was a statistically significant difference between the views expressed by resident property owners and those expressed by second home owners. Second home owners expressed greater satisfaction with the relationship of tourism to “cultural offerings” than did full time resident property owners, including “promotion of cultural and historical resources,” “mix of cultural offerings,” and “number of cultural offerings.” Full time residents and second home property owners share similar views regarding “interactions between visitors and property owners.”



5. Community Infrastructure and Tourism

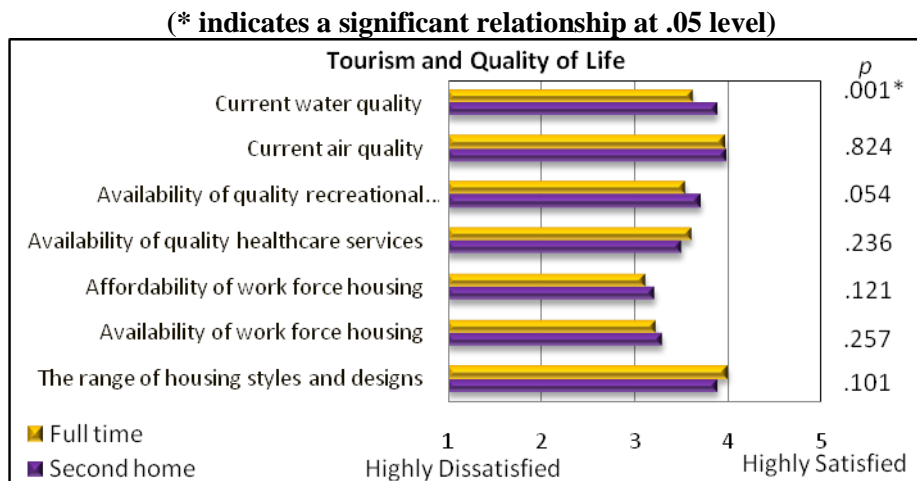
In this series of questions, respondents were asked to indicate their level of satisfaction with the relationship of the community infrastructure to tourism development for their community. For two of the

five questions in this category there was a statistically significant difference between the views expressed by resident property owners and those expressed by second home owners. Second home owners expressed greater satisfaction with the relationship of tourism to community infrastructure than did full time resident property owners on the questions of the “management of traffic generated by tourists” and the “quality of parks, greenways and bike lanes.” The two groups are in agreement on “management of storm water runoff,” “availability of public sewer system” and “availability of public parking during tourist season.”



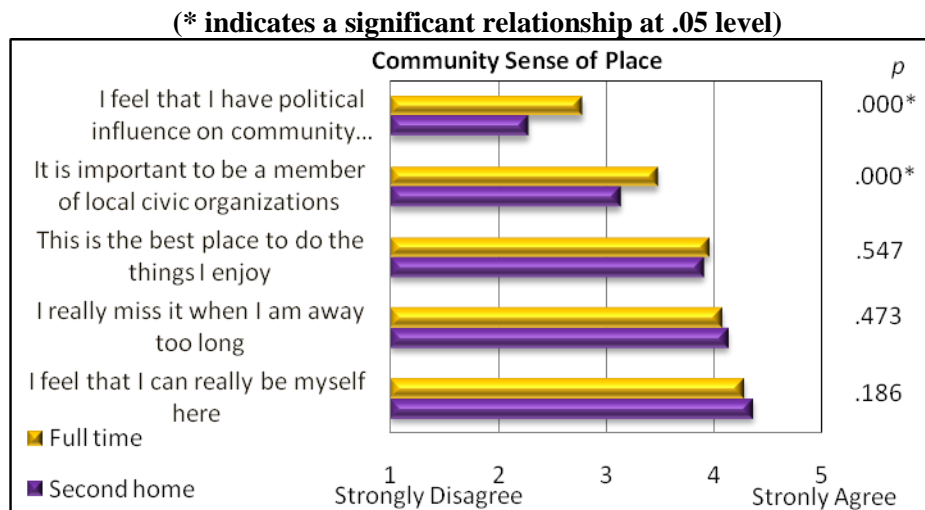
6. Tourism and Quality of Life

In this series of questions, respondents were asked to indicate their level of satisfaction with the relationship of the community’s quality of life and tourism development. For only one question in this category was there a statistically significant difference between the view expressed by resident property owners and that expressed by second home owners. Second home owners expressed greater satisfaction with the relationship of tourism to general quality of life than did full time resident property owners regarding “water quality in Brunswick County. Thus, full time resident property owners expressed less satisfaction with water quality than did second home owners. The two groups are in agreement on the “current air quality,” on “availability of quality healthcare facilities” and “recreational opportunities,” on “affordability and availability of work force housing,” and on the “range of housing styles and designs.”



Community Sense of Place

Community sense of place is a cross-disciplinary concept that recognizes the many ways in which places take on special meaning to people. Sustainable tourism development places great emphasis on identifying, analyzing and enhancing the characteristics and processes that give destinations a unique character. Such character can serve as the foundation for both an improved resident assessment of quality of living as well as an enhanced economy by attracting visitors and their expenditures. In this series of questions, respondents were asked to indicate their level of agreement with the items regarding their attachment to Brunswick County. For two of the five questions, full time residents expressed significantly greater level of attachment than did second home property owners. These two questions include: “I feel that I have political influence on community decisions” and “It is important to be a member of local civic organizations.” On the remaining three questions “This is the best place to do the things I enjoy”; “I really miss it when I am away too long”; and “I feel that I can really be myself here,” full time residents and second home owners show a similar level of attachment.

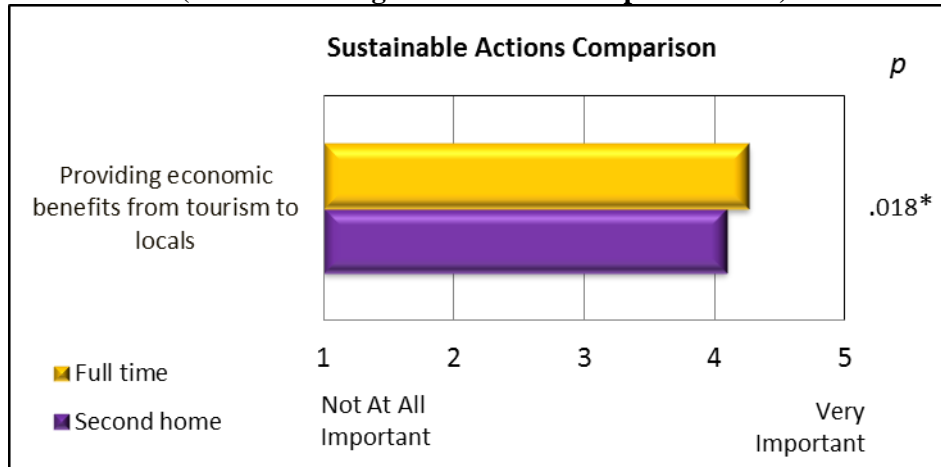


Sustainable Tourism Actions and Their Importance to Future Economic Success

Knowing the rapidly growing importance of integrating sustainability within the tourism industry as well as the propensity of increasing numbers of individuals to do the same within everyday life, survey participants were asked their opinion of the importance of fifteen sustainable actions to the future economic success of the County’s tourism industry. Such sustainable actions are being implemented in many competing tourist destinations thus they are emerging in importance to a destination’s branding as being socially and environmentally responsible. In addition, such actions are providing savings on operating costs and protect the destination’s natural resources. The response categories included a range of not important to very important.

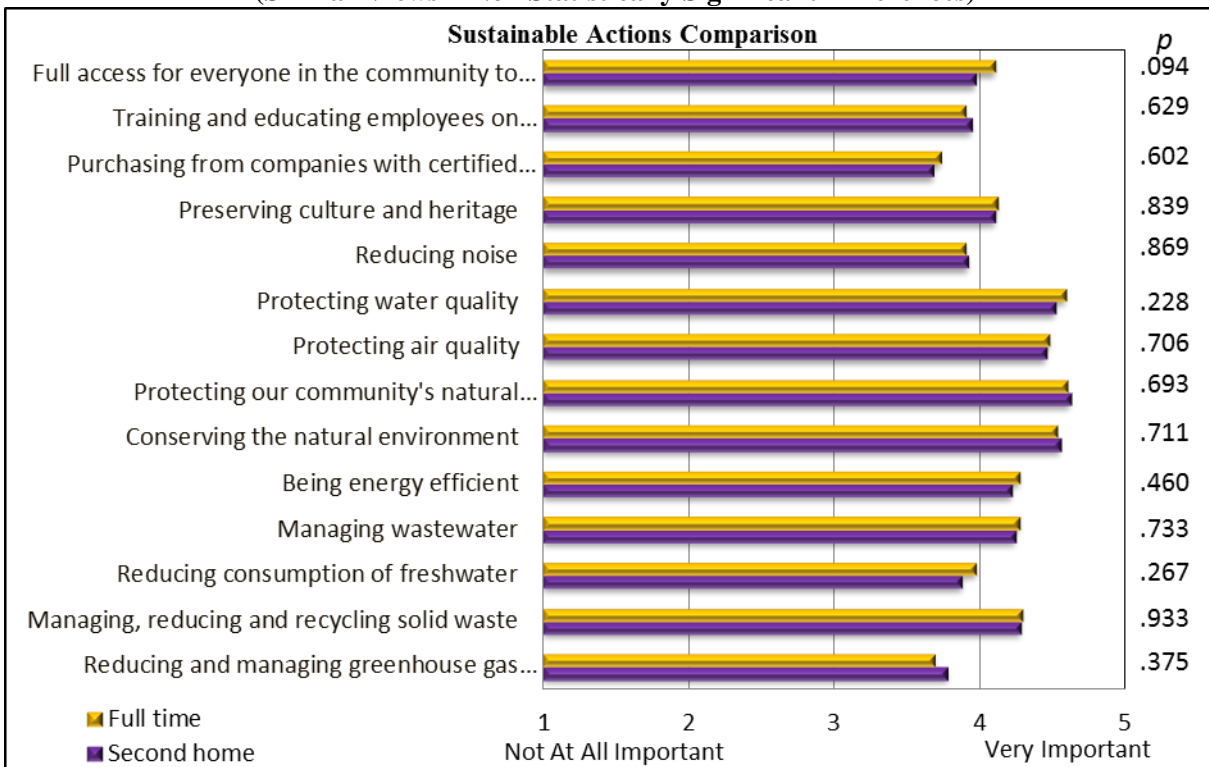
On only one of the 15 questions, was there a statistically significant difference between the views expressed by full time resident property owners and second home owners. On the issue of “providing economic benefits from tourism to locals,” full time residents indicated a greater level of importance of such actions to future economic success than did second home property owners.

(* indicates a significant relationship at .05 level)



Of the remaining fourteen items, both groups were in strong agreement, including “full access for everyone in the community to participate in tourism development decisions,” “training and educating employees and clients on sustainable practices,” “purchasing from companies with green certified practices,” “preserving culture and heritage,” “reducing noise,” “protecting water and air quality,” “protecting the community’s natural environment for future generations,” “conserving the natural environment,” “being energy efficient,” “managing wastewater,” “reducing consumption of freshwater,” “managing, reducing and recycling solid waste,” and “reducing and managing greenhouse gas emissions,” but not at a statistically significant level.

(Similar Views—Non Statistically Significant Differences)



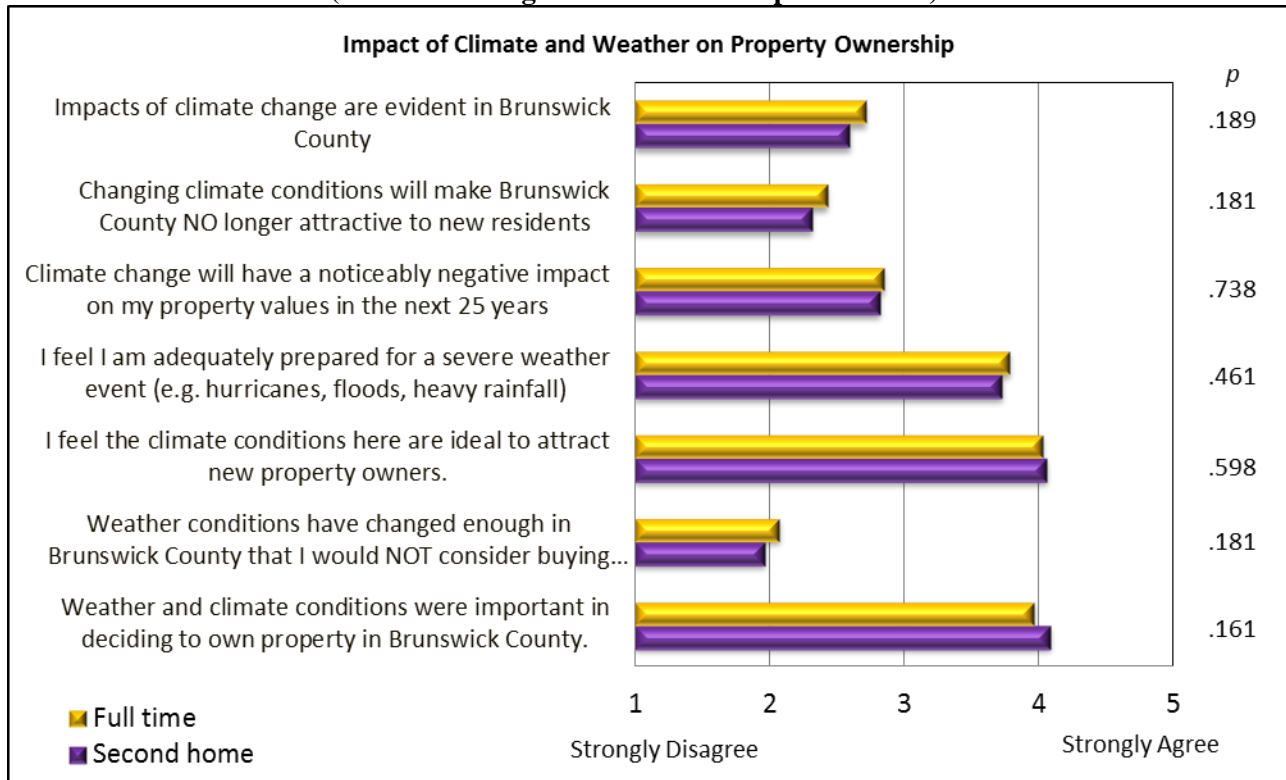
Climate and Weather

Tourism’s relationship to climate change is complex but direct, and generally there are two effects: 1) making a destination more or less attractive, and 2) making the origin of departure more or less attractive. The Intergovernmental Panel on Climate Change states that vulnerabilities of industries, infrastructures, settlements, and society to climate change are generally greater in certain high-risk areas such as coastal communities. An amenity-rich coastal tourism destination, one with dependence upon the construction of, and services for, a second home vacation economy, will most certainly be affected by climate change and its respective impacts. It has been noted that “Weather can ruin a holiday; but climate can ruin a destination.” Tourism is an industry highly sensitive to climate and changes in climate can directly affect the attractiveness of destinations to current and future property owners. This can substantially disturb a local and regional economy by directly impacting investments in the construction and maintenance of second homes.

1. Impact of Climate and Weather on Property Ownership

Study participants were asked to indicate their level of agreement on how climate and weather affects their ownership of property in Brunswick County. Full time residents and second home property owners share similar views on all of the questions in this category including: “impacts of climate change are evident in Brunswick County,” “changing climate conditions will make Brunswick county no longer attractive to new residents,” “climate change will have a noticeably negative impact on my property values for the next 25 years,” “I feel I am adequately prepared for a severe weather event,” “I feel the climate conditions here are ideal to attract new property owners,” “weather conditions have changed enough in Brunswick County that I would not consider buying property here in the future,” and “weather and climate conditions were important in deciding to own property in Brunswick County.”

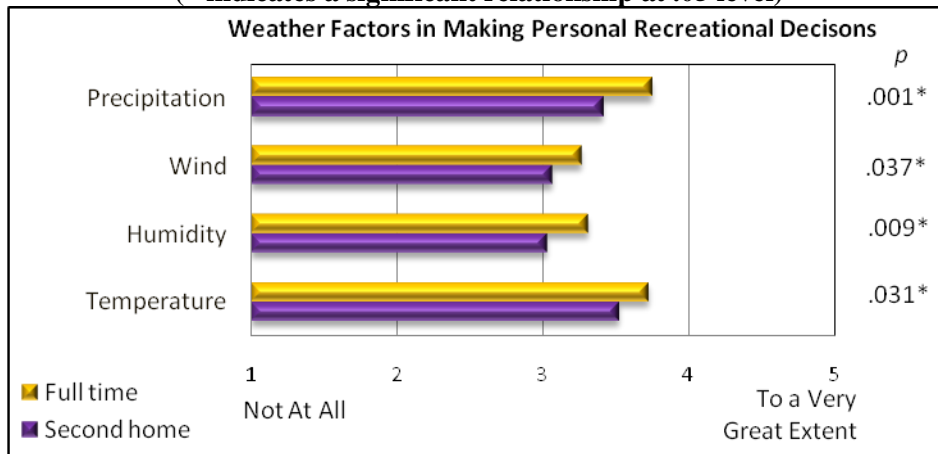
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2. Weather Factors in Making Personal Recreational Decisions

Participants were also asked to indicate the level of extent they use weather factors (temperature, humidity, wind and precipitation) when making personal recreational decisions. For all four questions in this category there was a statistically significant difference between the level of extent expressed by full time resident property owners and that expressed by second home owners. Weather factors such as temperature, humidity, wind and precipitation played a greater role in full time residents personal recreational decision-making than in that of second home property owners.

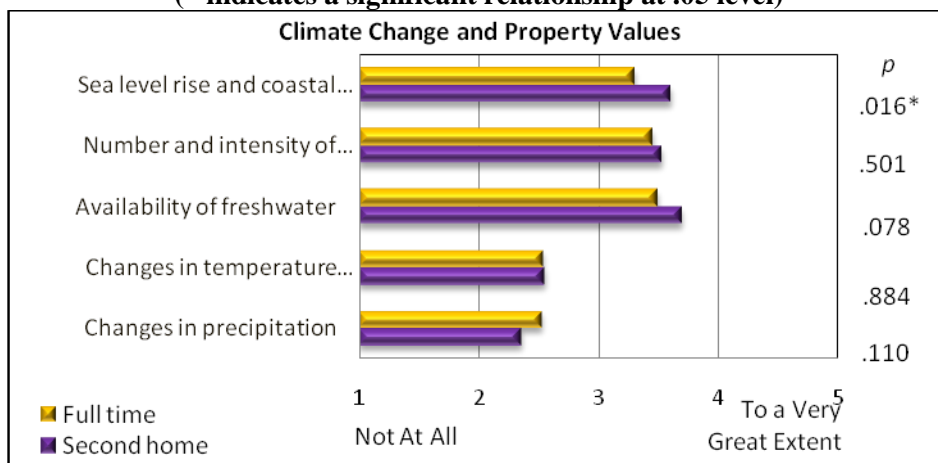
(* indicates a significant relationship at .05 level)



3. Climate Change and Future Property Values

In this section, participants were also asked to express their views on how climate change factors affect their future property values. There is a statistically significant difference between full time residents and second home property owners on how “sea level rise and coastal flooding affect their future property values.” Second home property owners feel sea level rise and coastal flooding will affect their future property values to a greater extent than full time residents do. Full time residents and second home property owners share similar views about the level of extent four of the climate change considerations will affect their future property values. These four climate change considerations include: “number and intensity of coastal storms,” “availability of freshwater,” “changes in temperature and/or humidity,” and “changes in precipitation.”

(* indicates a significant relationship at .05 level)



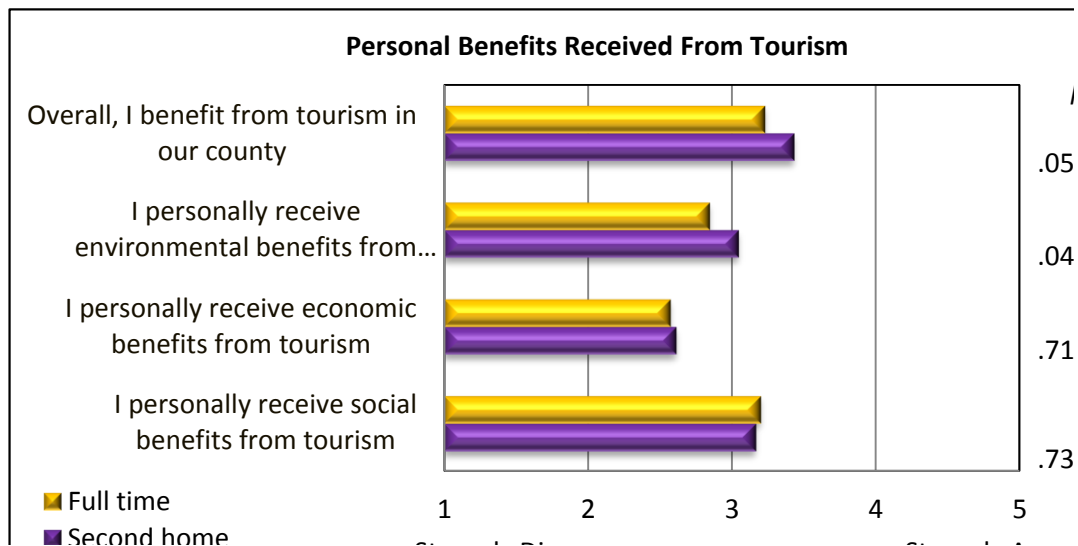
Property Owners Attitudes toward Impact of Tourism and Second Home Development

Tourism and its many and varied impacts is typically viewed from the “eyes of the beholder” as either being generally positive, generally negative, or somewhere along a continuum of both, depending upon many factors. When the added dimension of second home development is factored in that can often bring with it a largely absentee ownership, inflated housing costs, workforce issues, changing demographics, transportation access problems and environmental pressures, such impacts can more deeply affect property owners whether full time or second home. This section assesses property owners’ level of agreement on 1) personal benefits they received from tourism; 2) impacts of tourism on their community; and 3) their support for further tourism development.

1. Personal Benefits Received from Tourism

In this series of questions, respondents were asked to indicate their level of agreement with the items regarding personal benefits received from tourism development in Brunswick County. For only one of the four questions, there was a statistically significant difference between the view expressed by full time residents and those expressed by second home owners. Second home owners expressed greater level of “environmental benefits received from tourism” than did full time residents. Full time residents and second home property owners indicated that they received similar level of social, economic and overall benefits from tourism.

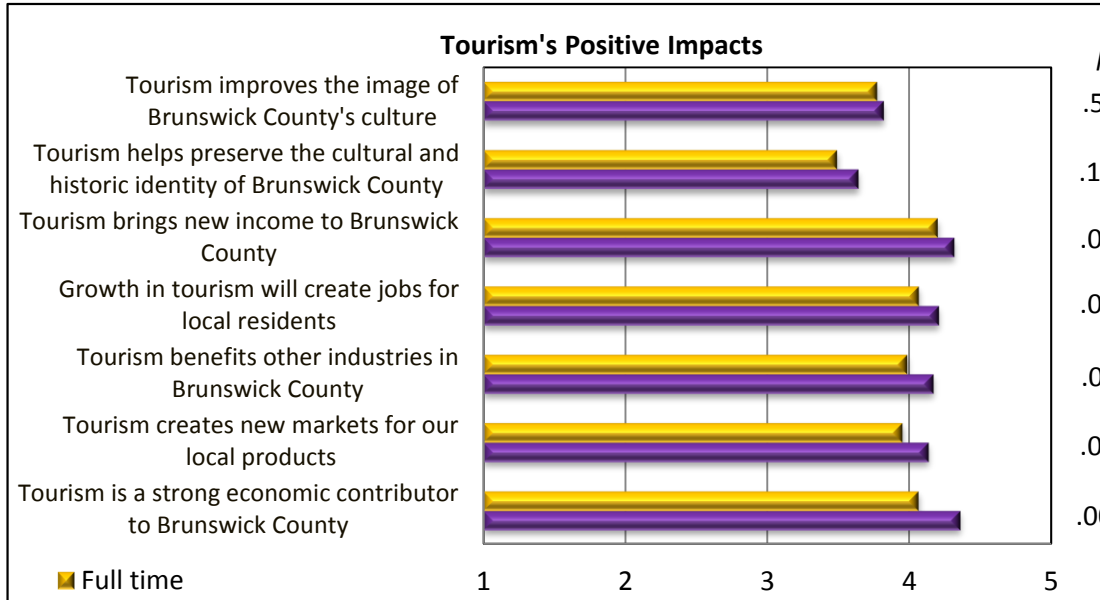
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2. Tourism’s Positive Impacts

Property owners’ attitudes toward tourism’s positive impacts were measured by seven variables. For four of these seven variables, second home property owners perceived a significantly greater level of positive impacts tourism has brought to Brunswick County than full time residents did. These four variables include: “tourism is a strong economic contributor to Brunswick County”; “tourism creates new markets for local products”; “tourism benefits other industries in Brunswick County”; and “growth in tourism will create jobs for local residents.” On the remaining three variables, “tourism brings new income to Brunswick County,” “tourism helps preserve the cultural and historic identity of Brunswick County,” and “tourism improves the image of Brunswick County’s culture,” full time residents and second home property owners shared similar perceptions.

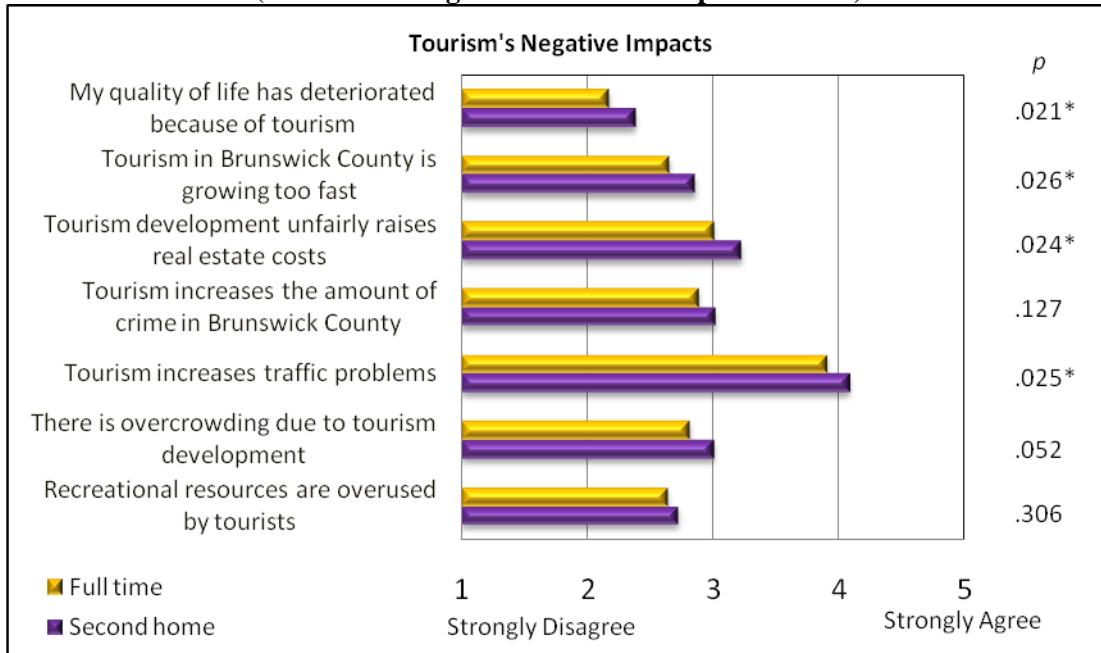
(* indicates a significant relationship at .05 level)



3. Tourism's Negative Impacts

Another seven variables measured property owners' perceptions on the negative impacts of tourism in Brunswick County. On four of these seven variables, second home property owners perceived a significantly greater level of negative impacts tourism has brought to Brunswick County than full time residents did. These four variables include: "my quality of life has deteriorated because of tourism"; "tourism in Brunswick County is growing too fast"; "tourism development unfairly raises real estate costs"; and "tourism increases traffic problems." On the remaining three questions, "tourism increases the amount of crime in Brunswick County," "there is overcrowding due to tourism development," and "recreational resources are overused by tourists," full time residents and second home property owners shared similar perceptions.

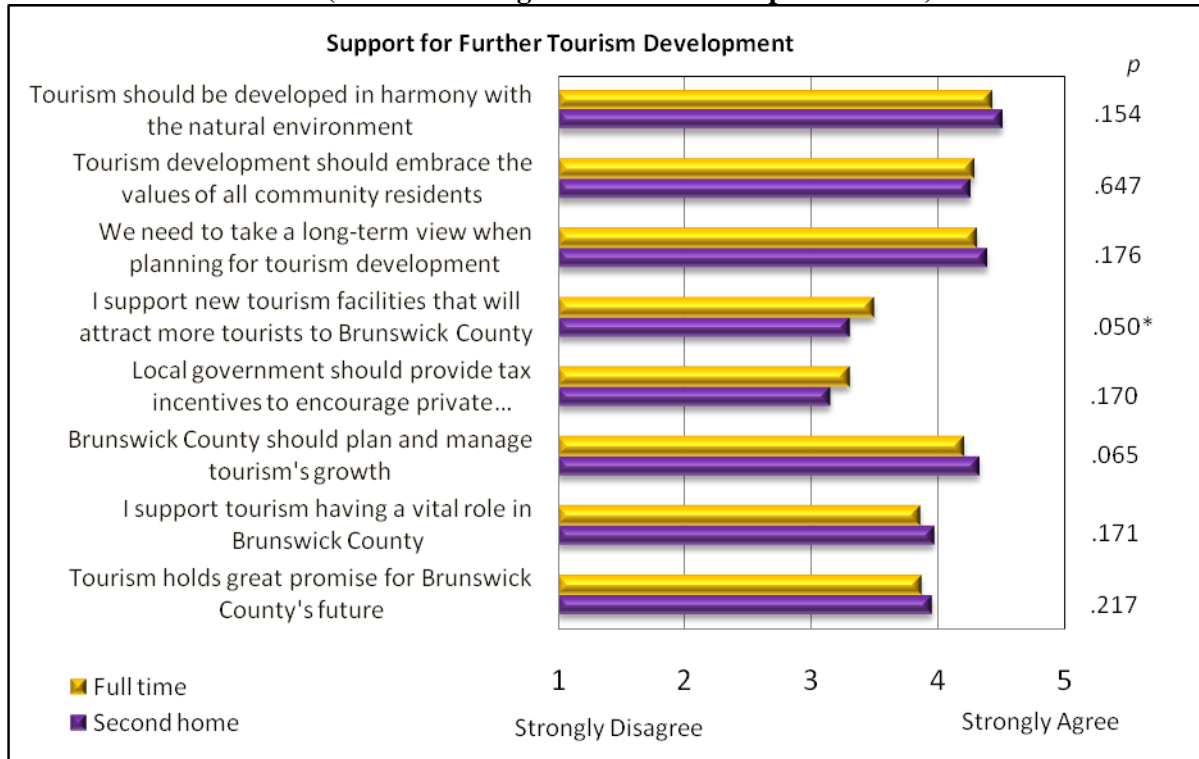
(* indicates a significant relationship at .05 level)



4. Support for Further Tourism Development

In this section, participants were also asked to indicate their level of support for further tourism development in Brunswick County. For only one out of eight questions, there is a significantly different level of support between full time residents and second home property owners. Full time residents expressed a greater level of support for “new tourism facilities that will attract more tourists” to Brunswick County than second home owners. For the remaining seven questions, second home property owners and full time residents indicated a similar level of support. These seven questions include: “tourism should be developed in harmony with the natural environment”; “tourism development should embrace the values of all community residents”; “we need to take a long-term view when planning for tourism development”; “local government should provide tax incentives to encourage private development in tourism”; “Brunswick County should plan and manage tourism’s growth”; “I support tourism having a vital role in Brunswick County”; and “Tourism holds great promise for Brunswick County’s future”.

(* indicates a significant relationship at .05 level)



Summary of Findings from Survey Respondents

(Comparison of Responses of Full Time Resident Property Owners and Second Home Owners)

Background and Demographics

- Tourism is a significant economic development component for Brunswick County in direct, indirect and induced spending. The North Carolina Department of Commerce, Division of Tourism, Film and Sports Development, reported that in 2010 domestic tourism generated \$395.38 million of economic impact with 4,600 jobs directly attributable to tourism. Additionally, tourism in Brunswick County resulted in \$73.63 million in payroll and \$46.15 million in state and local tax revenue.
- The presence of second homes in Brunswick County is noticeable in both numbers and value. Of the 928 single family properties reported in the 2009 county tax base worth \$1 million or more, 739 were second homes.
- Second home owners have substantially higher annual household income at all income levels starting at \$150,000 than do full-time residents.
- Over eighty percent (81.2%) of second home owners are 55 years of age or older.
- Over fifty percent of second home property owners (57.4%) intend to maintain current level of use of their second home properties.
- Approximately thirty five percent (35.6%) of second home property owners intend to increase personal use of their second home properties.
- Almost nineteen percent (18.9 %) of second home owners suggest they will retire to Brunswick County full time.
- 33.8% of second home owners compared to 23.9% of full-time resident property owners have post-graduate education.
- Second home owners were substantially more inclined than full-time residents to be a couple with children no longer in the household.
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There are many questions which do not result in a statistically significant difference but due to the level of the percent of response of either or both groups can help in determining the “strength” of support for any particular statement. In the following section, all questions in the survey instrument are presented along with the respective percentage response for each group of property owners in the either satisfied/highly satisfied or important/highly important response categories.

Relationship of Tourism to Community Life (Satisfied or Highly Satisfied)

Land Use and Tourism:

The amount of residential development	Fulltime Resident Property Owner	67.5%
	Second Home Property Owner	58.6%
The amount of non-tourism commercial development	Fulltime Resident Property Owner	48.7%
	Second Home Property Owner	60.6%

The amount of tourism commercial development	Fulltime Resident Property Owner	56.3%
	Second Home Property Owner	67.8%
<i>The Economy, Jobs and Tourism:</i>		
Number of tourism businesses	Fulltime Resident Property Owner	48.7%
	Second Home Property Owner	54.5%
Employment opportunities	Fulltime Resident Property Owner	15.7%
	Second Home Property Owner	11%
Cost of living compared to other coastal counties	Fulltime Resident Property Owner	67.9%
	Second Home Property Owner	71.1%
<i>Government Services and Tourism:</i>		
Cleanliness and upkeep of the county	Fulltime Resident Property Owner	66.7%
	Second Home Property Owner	74.8%
Fire and emergency services	Fulltime Resident Property Owner	84.9%
	Second Home Property Owner	82.8%
Crime prevention	Fulltime Resident Property Owner	63.3%
	Second Home Property Owner	67.8%
Educational offerings for adults	Fulltime Resident Property Owner	52.1%
	Second Home Property Owner	29.3%
Quality of local public educational system	Fulltime Resident Property Owner	33%
	Second Home Property Owner	18.7%
<i>Cultural Offerings and Tourism:</i>		
Interactions between visitors and property owners	Fulltime Resident Property Owner	44.6%
	Second Home Property Owner	48.3%
Promotion cultural and historical resources	Fulltime Resident Property Owner	46.3%
	Second Home Property Owner	53.6%
Mix of cultural offerings	Fulltime Resident Property Owner	46.6%
	Second Home Property Owner	46.2%
Number of cultural offerings	Fulltime Resident Property Owner	46.3%
	Second Home Property Owner	52.1%

Community Infrastructure and Tourism:

Management of storm water runoff	Fulltime Resident Property Owner	44.2%
	Second Home Property Owner	41.4%
Availability of public sewer system	Fulltime Resident Property Owner	55.6%
	Second Home Property Owner	58.7%
The management of traffic generated by tourists	Fulltime Resident Property Owner	31.1%
	Second Home Property Owner	43.3%
The quality of parks, greenways and bike lanes	Fulltime Resident Property Owner	47.1%
	Second Home Property Owner	54%
Availability of public parking during tourist season	Fulltime Resident Property Owner	39.4%
	Second Home Property Owner	48.7%

Tourism and Quality of Life:

Current water quality	Fulltime Resident Property Owner	66.3%
	Second Home Property Owner	81.5%
Current air quality	Fulltime Resident Property Owner	82.6%
	Second Home Property Owner	87.9%
Availability of quality recreational opportunities	Fulltime Resident Property Owner	62.1%
	Second Home Property Owner	68.7%
Availability of quality healthcare services	Fulltime Resident Property Owner	65.3%
	Second Home Property Owner	54.5%
Affordability of work force housing	Fulltime Resident Property Owner	28.4%
	Second Home Property Owner	27.1%
Availability of work force housing	Fulltime Resident Property Owner	34.1%
	Second Home Property Owner	32.9%
The range of housing styles and designs	Fulltime Resident Property Owner	82.1%
	Second Home Property Owner	82.1%

**Sustainability and Economic Success
(Important/Very Important)**

Protecting our community's natural environment for the future	Fulltime Resident Property Owner	95.8%
	Second Home Property Owner	97%
Conserving the natural environment	Fulltime Resident Property Owner	95.3%
	Second Home Property Owner	94.5%

Being energy efficient	Fulltime Resident Property Owner	91.1%
	Second Home Property Owner	87.6%
Managing waste water	Fulltime Resident Property Owner	92.1%
	Second Home Property Owner	88%
Reducing consumption of freshwater	Fulltime Resident Property Owner	78.2%
	Second Home Property Owner	72.3%
Managing, reducing and recycling solid waste	Fulltime Resident Property Owner	94.1%
	Second Home Property Owner	89.8%
Reducing and managing greenhouse gas emissions	Fulltime Resident Property Owner	66%
	Second Home Property Owner	67%
Full access for everyone in the community to participate in tourism	Fulltime Resident Property Owner	80.9%
	Second Home Property Owner	77.9%
Training and educating employees on sustainability practices	Fulltime Resident Property Owner	74.9%
	Second Home Property Owner	76.6%
Purchasing from companies with certified green practices	Fulltime Resident Property Owner	67.7%
	Second Home Property Owner	61.2%
Providing economic benefits from tourism to locals	Fulltime Resident Property Owner	92.1%
	Second Home Property Owner	83.2%
Preserving culture and heritage	Fulltime Resident Property Owner	84.7%
	Second Home Property Owner	81.6%
Reducing noise	Fulltime Resident Property Owner	72%
	Second Home Property Owner	73%
Protecting water quality	Fulltime Resident Property Owner	97.4%
	Second Home Property Owner	94.5%
Protecting air quality	Fulltime Resident Property Owner	93.7%
	Second Home Property Owner	94.5%

**Impact of Climate and Weather
(Important/Very Important)**

Impacts of climate change are evident in Brunswick County	Fulltime Resident Property Owner	18.5%
	Second Home Property Owner	15.8%
Changing climate conditions will make Brunswick County no longer a desirable place to live	Fulltime Resident Property Owner	11.6%
	Second Home Property Owner	7.3%

Climate change will have a noticeable negative impact on my property value in the next 25 years.	Fulltime Resident Property Owner	25.1%
	Second Home Property Owner	24.9%
I feel I am adequately prepared for a severe weather event	Fulltime Resident Property Owner	75.1%
	Second Home Property Owner	75.3%
I feel the climate conditions here are ideal to attract new property owners	Fulltime Resident Property Owner	84.1%
	Second Home Property Owner	87.2%
Weather conditions have changed enough in Brunswick County that I would <i>not</i> consider buying property here in the future.	Fulltime Resident Property Owner	7.4%
	Second Home Property Owner	3%
Weather and climate conditions were important in deciding to own property here.	Fulltime Resident Property Owner	73.5%
	Second Home Property Owner	81.7%

**Weather Factors Affecting Personal Recreational Decisions
(Agree/Strongly Agree)**

Precipitation	Fulltime Resident Property Owner	61.6%
	Second Home Property Owner	47.1%
Wind	Fulltime Resident Property Owner	38.4%
	Second Home Property Owner	30.4%
Humidity	Fulltime Resident Property Owner	44.7%
	Second Home Property Owner	31.2%
Temperature	Fulltime Resident Property Owner	62.1%
	Second Home Property Owner	56.3%

**Climate Change and Future Property Values
(Agree/Strongly Agree)**

Changes in precipitation	Fulltime Resident Property Owner	16.4%
	Second Home Property Owner	11.2%
Changes in temperature and/or humidity	Fulltime Resident Property Owner	17.5%
	Second Home Property Owner	18.4%
Availability of freshwater	Fulltime Resident Property Owner	58.2%
	Second Home Property Owner	68.6%
Sea level rise and coastal flooding	Fulltime Resident Property Owner	51.1%
	Second Home Property Owner	60.4%
Number and intensity of coastal storms	Fulltime Resident Property Owner	51.9%
	Second Home Property Owner	57.4%

Personal Attitudes About Living in the Community (Community Attachment)
(Agree/Strongly Agree)

I feel that I have political influence on community decisions	Fulltime Resident Property Owner	23.3%
	Second Home Property Owner	6.9%
It is important to be a member of local civic organizations	Fulltime Resident Property Owner	52.1%
	Second Home Property Owner	30%
This is the best place to do the things I enjoy	Fulltime Resident Property Owner	72.2%
	Second Home Property Owner	71.1%
I really miss it when I am away too long	Fulltime Resident Property Owner	80.4%
	Second Home Property Owner	81.8%
I feel I can really be myself here	Fulltime Resident Property Owner	91.5%
	Second Home Property Owner	94.1%

Personal Benefits from Tourism
(Agree/Strongly Agree)

I personally receive social benefits from tourism (e.g. improved quality of life, meeting interesting people)	Fulltime Resident Property Owner	43.4%
	Second Home Property Owner	42.1%
I personally receive economic benefits from tourism (e.g. income, employment)	Fulltime Resident Property Owner	20.2%
	Second Home Property Owner	25.8%
I personally receive environmental benefits from tourism (e.g. use of public lands, recycling programs)	Fulltime Resident Property Owner	28%
	Second Home Property Owner	37.3%
Overall, I benefit from tourism in our county	Fulltime Resident Property Owner	44.9%
	Second Home Property Owner	55.5%

Tourism's Positive Impacts
(Agree/Strongly Agree)

Tourism is a strong economic contributor to Brunswick County	Fulltime Resident Property Owner	84.3%
	Second Home Property Owner	97%
Tourism creates new markets for our local products	Fulltime Resident Property Owner	78.4%
	Second Home Property Owner	87.2%
Tourism benefits other industries in Brunswick County	Fulltime Resident Property Owner	80.5%
	Second Home Property Owner	88.9%

Growth in tourism will create jobs for local residents	Fulltime Resident Property Owner	83.2%
	Second Home Property Owner	90.2%
Tourism brings new income to Brunswick County	Fulltime Resident Property Owner	91.4%
	Second Home Property Owner	96.2%
Tourism helps preserve the cultural and historic identity of Brunswick County	Fulltime Resident Property Owner	52.4%
	Second Home Property Owner	57%
Tourism improves the image of Brunswick County's culture	Fulltime Resident Property Owner	67.9%
	Second Home Property Owner	70%

**Tourism's Negative Impacts
(Agree/Strongly Agree)**

Recreational resources are overused by tourists	Fulltime Resident Property Owner	17.3%
	Second Home Property Owner	17.7%
There is overcrowding due to tourism development	Fulltime Resident Property Owner	27.9%
	Second Home Property Owner	35.7%
Tourism increases traffic problems	Fulltime Resident Property Owner	80%
	Second Home Property Owner	86.3%
Tourism increases the amount of crime in Brunswick County	Fulltime Resident Property Owner	24%
	Second Home Property Owner	26.4%
Tourism development unfairly raises real estate values	Fulltime Resident Property Owner	28.1%
	Second Home Property Owner	41.3%
Tourism in Brunswick County is growing too fast	Fulltime Resident Property Owner	17.3%
	Second Home Property Owner	22.7%
My quality of life has deteriorated because of tourism	Fulltime Resident Property Owner	7%
	Second Home Property Owner	11.7%

Support for Further Tourism Development

Tourism holds great promise for Brunswick County's future	Fulltime Resident Property Owner	77%
	Second Home Property Owner	81.5%
I support tourism having a vital role in Brunswick County	Fulltime Resident Property Owner	77.6%
	Second Home Property Owner	82.8%

Brunswick County should plan and manage tourism's growth	Fulltime Resident Property Owner	91.8%
	Second Home Property Owner	94.4%
Local government should provide tax incentives to encourage private development in tourism	Fulltime Resident Property Owner	51.1%
	Second Home Property Owner	40.1%
I support new facilities that will attract more tourists to Brunswick County	Fulltime Resident Property Owner	59.9%
	Second Home Property Owner	46.3%
We need to take a long-term view when planning for tourism development	Fulltime Resident Property Owner	91.3%
	Second Home Property Owner	95.7%
Tourism development should embrace the values of all community residents	Fulltime Resident Property Owner	90.6%
	Second Home Property Owner	91.4%
Tourism should be developed in harmony with the natural environment	Fulltime Resident Property Owner	92.8%
	Second Home Property Owner	97.9%

The following information summarizes those comparisons that are statistically significant at the .05 confidence level between full-time resident property owners and second home owners. This means that 95 out of 100 times the results between fulltime resident property owners and second home owners will be predictably different. The .05 is the threshold used for the confidence level, a typical standard in scientific research.

Relationship of Tourism to the Six Dimensions of Community Life (statistically significant)

Second home owners expressed greater satisfaction with:

- The amount of non-commercial tourism development;
- Tourism and employment opportunities;
- Tourism and cost of living compared to other coastal counties.

- Tourism and cleanliness and upkeep of the community.

- The promotion of cultural and historical resources;
- The number and mix of cultural offerings.

- The management of tourist traffic.
- The quality of parks, greenways and bike lanes.

- Tourism and water quality.

Community Sense of Place (statistically significant)

Full time residents expressed a greater level of attachment than did second home property owners on two questions including;

- It is important to be a member of local civic organizations;
- I feel that I have political influence on community decisions.

Importance of Sustainable Actions to Future Economic Success in Tourism (statistically significant)

Full time residents expressed a greater level of significance than did second home property owners on:

- Providing economic benefits from tourism to locals.

Climate and Weather (statistically significant)

Weather factors such as temperature, humidity, wind and precipitation played a greater role in full time residents personal recreational decision-making process than in that of second home property owners.

Second home property owners feel “sea level rise and coastal flooding will affect their future property values” to a greater extent than full time residents do.

Tourism’s Impact and Support for Further Tourism Development (statistically significant)

Second home property owners perceived a significantly greater level of positive impacts tourism has brought to Brunswick County including;

- Tourism is a strong economic contributor to Brunswick County;
- Tourism creates new markets for local products;
- Tourism benefits other industries in Brunswick County;
- Growth in tourism will create jobs for local residents.

Second home property owners perceived a greater level of negative impacts tourism has brought to Brunswick County including:

- My quality of life has deteriorated because of tourism;
- Tourism in Brunswick County is growing too fast;
- Tourism development unfairly raises real estate costs;
- Tourism increases traffic problems.

Second home owners expressed “greater level of environmental benefits received from tourism” than did full time residents.

Full time residents expressed a greater level of support for:

- New tourism facilities that will attract more tourists to Brunswick County.

The Next Step

Importantly, the next step in this study is for the researchers to disseminate the findings as broadly as possible throughout Brunswick County and, to the extent possible, encourage public review and discussion. The information contained in this report will most certainly become more useful as the various stakeholder groups become familiar with the details of the study findings. It would seem important to put this information within the context of the current private and public “climate” and discussions and to consider the implications of the findings to future tourism planning and development by both the public and private sectors. With the many and varied challenges facing coastal counties in sustaining their environment, economy and community sense of place, it is challenging to think and act strategically on how tourism can be accomplished in a sustainable manner to best serve residents and visitors alike.

This study was undertaken by the faculty, staff and students of the Center for Sustainable Tourism at East Carolina University, with funding from North Carolina Sea Grant, as part of an on-going research effort to understand key issues facing tourism-based coastal communities and to keep North Carolina

competitive. Its purpose was to provide information to stakeholders of Brunswick County regarding the attitudes of home owners, both full time residents and second home owners, of the impacts of tourism and second home development, identify the importance of sustainable actions to the county's long-term economic health, as well as determine the manner and extent that climate impacts resident and second home property and recreational decisions. It was also undertaken to explore research questions that contribute to the broader understanding of how communities, rich in natural amenities, might adjust to the many changes and pressures brought about by tourism and second home development. The information contained in this report is being made available to all interested audiences with the intent to stimulate discussion, help identify the many and varied perspectives, and provide additional understanding of the complex nature of the interface of the tourism industry, second home development and a community's quality of life.