

RED WOLVES: CREATING ECONOMIC OPPORTUNITY THROUGH ECOTOURISM IN RURAL NORTH CAROLINA



REPORT BY

DR. GAIL Y. B. LASH & PAMELA BLACK
URSA INTERNATIONAL

FOR

DEFENDERS OF WILDLIFE
WASHINGTON, DC



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**DEFENDERS OF WILDLIFE
1130 SEVENTEENTH STREET NW
WASHINGTON, DC 20036-4604 USA
PHONE: 1-202-682-9400
WEB: [HTTP://WWW.DEFENDERS.ORG](http://WWW.DEFENDERS.ORG)**

**URSA INTERNATIONAL
366 OAKLAND AVE., SE
ATLANTA, GA 30312-2233 USA
PHONE: 1-404-222-9595
WEB: [HTTP://WWW.URSAINTERNATIONAL.ORG](http://WWW.URSAINTERNATIONAL.ORG)**

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FOREWORD

To be written by Defenders – ONE PAGE ONLY! (or all page numbers change...)

EXECUTIVE SUMMARY

Smaller and less familiar than its gray wolf cousin, the red wolf (*Canis rufus*) is thought by some researchers to be the only wolf species native to this hemisphere. It was the dominant wild canid in southeastern North America prior to European settlement, but as civilization pressed westward, wolves were seen as nuisances and were killed when the opportunity arose. The few red wolves that survived were forced into marginal habitat, and pushed to the verge of extinction. The last wild red wolves in the United States were trapped and put into a captive breeding program in the 1970s. In 1987, these wolves' descendants were released at the Alligator River National Wildlife Refuge in northeastern North Carolina, marking the first time ever that a species declared extinct in the wild had been restored to part of its former range.

Over the past 17 years, the reintroduced red wolves have successfully established themselves, and there are currently approximately 100 wolves in mainland Washington, Beaufort, Dare, Tyrrell, and Hyde Counties of northeastern North Carolina. Biologists believe they can reach natural sustainability, but intensive management is still necessary to ensure the species' ongoing recovery.

Like all species recovery programs, public acceptance of red wolves is essential to the program's success. In prior studies, North Carolina residents' reaction to red wolves has been mixed. While the vast majority of people were excited to have red wolves back in their midst, others were less certain and expressed economic and social concerns. One important method for addressing these local concerns is through the use of market-based incentives, such as the concept of community-based ecotourism initiatives. These rural areas are abundant with wildlife with which to attract the tourist, as well as numerous waterways for recreation and sport.

The unique advantage of using wild red wolves as a major tourism attraction is that they exist nowhere else on the planet. This gives rural North Carolinians a distinct advantage when it comes to tourism revenues and marketing. For example, Cornell University found that the economic impact of a wolf education center could generate millions to the multi-state region in annual tourist revenues (Rosen 1996). The key to capitalizing on this advantage is to assess whether local landowners and residents are ready to provide the associated amenities, services, and recreational packages that tourists are looking for.

This study, by Defenders of Wildlife and funded by the Alex C. Walker Foundation, conducted a feasibility assessment of ecotourism potential by landowners and general residents in Tyrrell and Hyde Counties, in rural northeastern North Carolina. To our knowledge, this is the first analysis of a market-based incentive project with Tyrrell and Hyde Counties' community members based on the endangered red wolf.

Results from this study came from its two parts: 1) the community survey of the capacity of residents to supply red wolf and wildlife tourism, and 2) the demand of tourists coming to the Outer Banks for these proposed activities and attractions.

Community data show that Tyrrell and Hyde County residents are interested in economic growth for their area; protecting the natural beauty and rural setting of their counties; providing job opportunities for youth; preserving the historical, quaint, small-town look and feel; and having a distinct town area, some residential development areas and a predominantly rural, farm setting.

They can supply access to wilderness areas and great natural beauty; abundant wildlife viewing; educational tours about wildlife, rural life, farming and fishing industries; and nature-based activities such as hiking and water recreation.

Residents and potential local entrepreneurs need training in general business and in hospitality and tourism specifics; youth programs; hands-on assistance getting their businesses ramped up; mutually beneficial partnerships with current tour operators; funding options; and marketing help.

Tourist data show that visitors are looking for day or short-stay trips that provide natural beauty and wilderness settings; wildlife and nature viewing activities; the charm and ambiance of historical, quaint, small-town settings; education in rural or nature-based lifestyles; small-town, relaxed activities such as specialty shopping, dining, river cruises; and water activities.

Typically, in their week long stay, more than 90 percent of surveyed Outer Banks visitors are willing to make one or more day trips to these “Inner Banks” areas for these activities. Almost half would be willing to stay in the Columbia area on future vacations and take day trips to Outer Banks beaches. Once infrastructure and day-trip packages for these tourist activities are developed in Tyrrell and Hyde Counties, the market is ready.

Tourist data from this study show that the proposed Red Wolf Center would be both a tourist draw highlighting all community tourism options, as well as a financial success on its own merits. If only 10 percent of those Outer Banks tourists who say they will visit the Center and pay \$5 admission actually come, those numbers translate into more than \$1 million in gate receipts and food/gift purchases over a single summer season.

A public meeting, attended by local leaders, farmers, fishermen, land managers, area conservationists, and other residents, was convened in Tyrrell County in August 2004, to confirm findings, solicit additional feedback, and establish the groundwork for ecotourism development. This report merges project data and community comments into next-step recommendations: 1) build the Red Wolf Center; 2) create a Tourism Plan for Tyrrell and Hyde Counties; 3) educate and assist residents in tourism; 4) get youth involved; 5) create and package day trips; 6) build tourism facilities; 7) increase communication between USFWS and community; 8) clean up Columbia at Highway 64; and 9) general suggestions regarding SWOT results. This report acts as a valuable tool for obtaining additional funding for implementation.

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LIST OF ABBREVIATIONS

ARNWR	Alligator River National Wildlife Refuge
CDC	See TCCDC
DOT	Department Of Transportation
FWS	See USFWS
GSMNP	Great Smoky Mountains National Park
NC	North Carolina
NENC	Northeastern North Carolina
NGO	Non-governmental organization
OLF	Outlying Landing Field (Military Base)
PFTS	Partnership For The Sounds
PLNWR	Pocosin Lakes National Wildlife Refuge
RWC	Red Wolf Coalition
TCCDC	Tyrrell County Community Development Corporation
TCF	The Conservation Fund
USFWS	United States Fish and Wildlife Service

INTRODUCTION

“Ecotourism means many things to many people. In my view it should mean travel to enjoy the world’s amazing diversity of natural life and human culture without causing damage to either...A vital requirement is that visitors should show respect for both the environment and the people who live in it...Above all, the tourist industry has to remember a central precept: do not kill the goose which lays the golden eggs.”

Sir Crispin Tickell (Cater and Lowman 1994)

PURPOSE OF STUDY

The reintroduction of any carnivore species into areas of human habitation is controversial at best. Wolves have stirred strong emotions in humans for centuries, and recovery programs have been challenged with the polarity of positive and negative attitudes towards these charismatic mega-vertebrates (Bangs, *et. al.* 2004; Lynn 2004; Fox 2004; Weiss 2004).

Since the reintroduction of red wolves into northeastern North Carolina (NENC) and the Great Smoky Mountains National Park, a couple of key studies have examined resident and visitor attitudes towards red wolves, as well as the potential for red wolves to generate revenue from this southeastern, multi-state region in support of wolf recovery (Quintal 1995; Rosen 1996). These studies indicate that, overall, public opinion has been in favor of red wolf reintroduction, including the majority of residents living in the five counties of NENC affected by the reintroduction. Quintal (1995) cautioned, however, that her results were not a clear victory in favor of the wolves – that more research was needed to understand the conflicting answers of local respondents.

Almost ten years later, this project by Defenders of Wildlife sought to bring a new perspective to studying residents’ attitudes toward red wolves – by examining opportunities for residents to generate economic benefits through community-based ecotourism, and to determine if these ventures matched Outer Banks’ tourist demands.

The purpose of this study was to assess the feasibility of establishing a community-based ecotourism program in Tyrrell and Hyde Counties, NC, based on red wolves and other wildlife, that would improve community economic status, include participatory decision-making, provide an incentive for conservation of endangered red wolves, and result in an exchange of knowledge between tourists and the community.

Community assessments that combine both community supply and market demand of community-based ecotourism ventures are rare. This project is based on the Rural Ecotourism Assessment Program (REAP) model (Lash and Austin 2003), and examined both the capacity of rural residents to supply wolf and wildlife tourism, and the marketability of these possible ventures through a demand survey of tourists already visiting the Outer Banks, just 35 miles away.

This Report outlines Strategies and Next Steps for community-based ecotourism infrastructure and training. This report is a valuable tool for obtaining funding for implementation of these products and next-steps.

HISTORY OF THE RED WOLF RECOVERY PROGRAM

Red wolves (*Canis rufus*) existed historically throughout the southeastern United States, from Pennsylvania to Florida and west into Texas. By 1967, their total population had dwindled to the point of being listed federally as an endangered species. Causes of their population decline included habitat loss to development, hunting of the wolf as a nuisance species, and interbreeding with coyotes as wolf mates became scarce. In 1969, wolves were captured and placed in captivity at the Point Defiance Zoo. With the passage of the Endangered Species Act in 1973, all of the remaining, known red wolves in the wild (14) were captured, and a captive breeding program started.

In 1977, the first litter of pups was born in captivity, along with the first successful release and recapture of red wolves on Bulls Island the following year. In 1980, the last of the wild red wolves were brought into captivity, and red wolves were declared extinct in the wild. The USFWS searched for suitable release sites, and after extensive public outreach, began the first reintroduction of red wolves in 1987 at the Alligator River National Wildlife Refuge (ARNWR) in northeastern North Carolina. Additional wolves were released in 1993 to nearby Pocosin Lakes National Wildlife Refuge. A second reintroduction project of red wolves began in 1991 in the Great Smoky Mountains National Park, with pups born in 1993. This project was cancelled in 1998 due to the inability of wolves to establish home ranges within the park, and to low pup survival.

By 1996, the primary challenge for the USFWS was the confirmed hybridization of red wolves and coyotes. An Adaptive Management Plan was put into place addressing this threat. A benchmark was crossed in late 2002, with all wild red wolves being wild-born. Additionally, two captive pups were successfully introduced and accepted into a wild litter (USFWS 2003).

At the time of this study in 2004, the population of wild red wolves was approximately 100 animals, 67 of which were radio-collared, with 6 animals in USFWS holding pens at ARNWR (*pers comm.* USFWS, Jan 12, 2005). Eighteen breeding pairs birthed a total of 55 pups in the spring of 2004. Causes of mortality of wild wolves in 2004 were: natural, such as disease-related and intraspecific aggression (28%), incidental, such as vehicles (25%), suspicious, such as gunshot (21%), unknown (16%), management, such as trap or handling-related (10%) (*pers comm.* USFWS, Jan 12, 2005). As of January 2005, the captive population is 140 animals managed in 37 approved facilities (Red Wolf Studbook, Point Defiance Zoo & Aquarium).

The goal of the Red Wolf Recovery Plan is to “[a]chieve a series of disjunct populations of red wolves, through reintroduction, that are numerically large enough to have the potential for allowing natural evolutionary processes to work within the species. Objective No. 1: To preserve 80 to 90 percent genetic diversity of the species for 150

years. Objective No. 2: To remove those threats that have the potential to bring about extinction of the species. Achieving this objective will require a wild population of approximately 220 animals and a captive population of approximately 330 animals. Objective No. 3: To maintain the red wolf in perpetuity through cryogenic preservation of sperm and embryo banking.” (USFWS 1989).

TYRRELL COUNTY DEVELOPMENT & LAND USE

Most of our study’s inquiry was based in Tyrrell County, North Carolina (NC). Neighboring Hyde County also contains vast tracks of farmland and woodlands that support the red wolf, and therefore a few key landowners and officials in this county were also interviewed. Of these two counties, the main traffic pattern for tourists heading to the Outer Banks, located mostly in Dare County, is through Columbia, NC – the heart of Tyrrell County and its waterfront attractions – therefore this study concentrates on the people and agencies residing in Tyrrell County.

FIGURE 1. “Inner” & Outer Banks, NC

Source: Spaceshots, Inc., Studio City, CA 2002

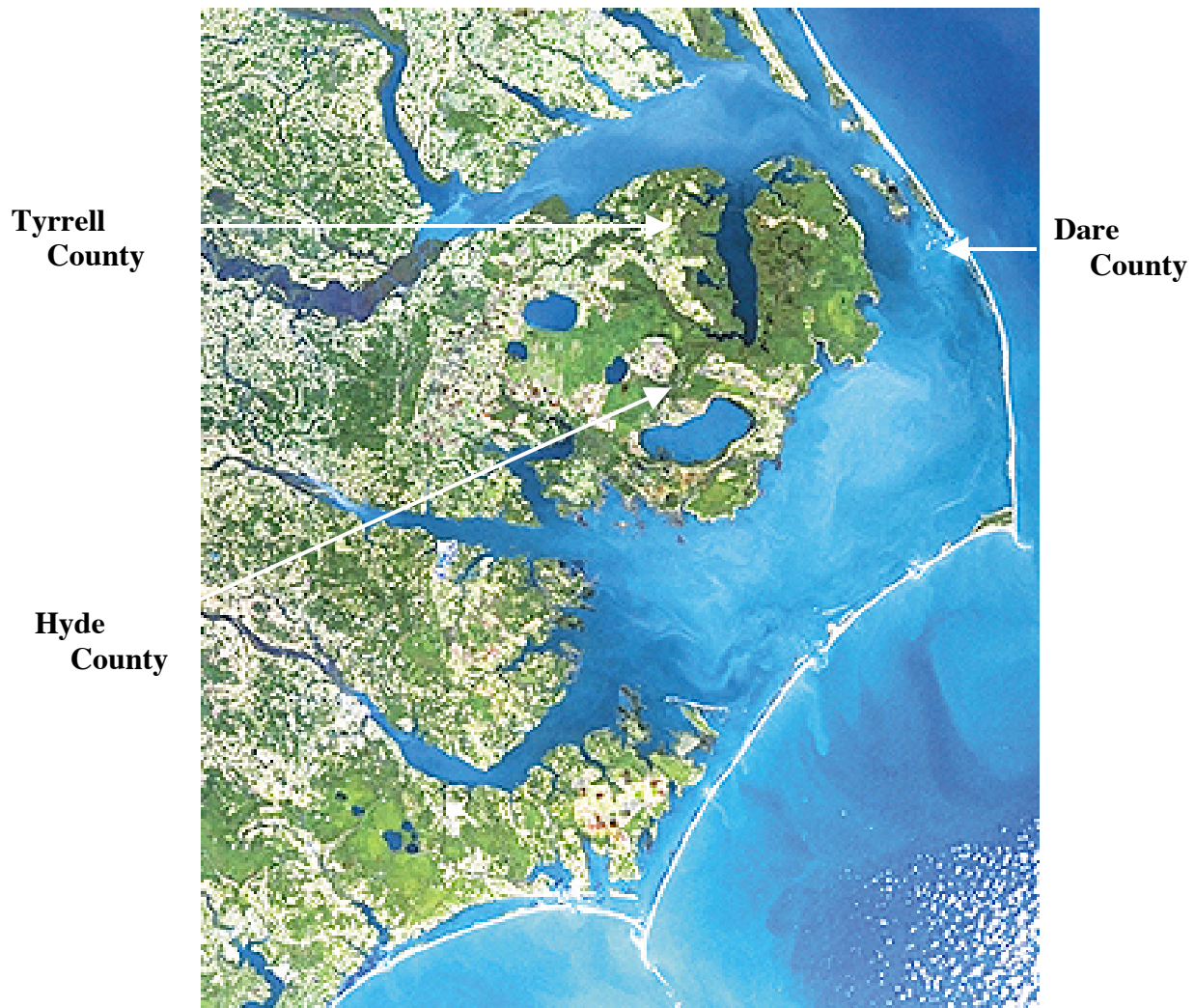
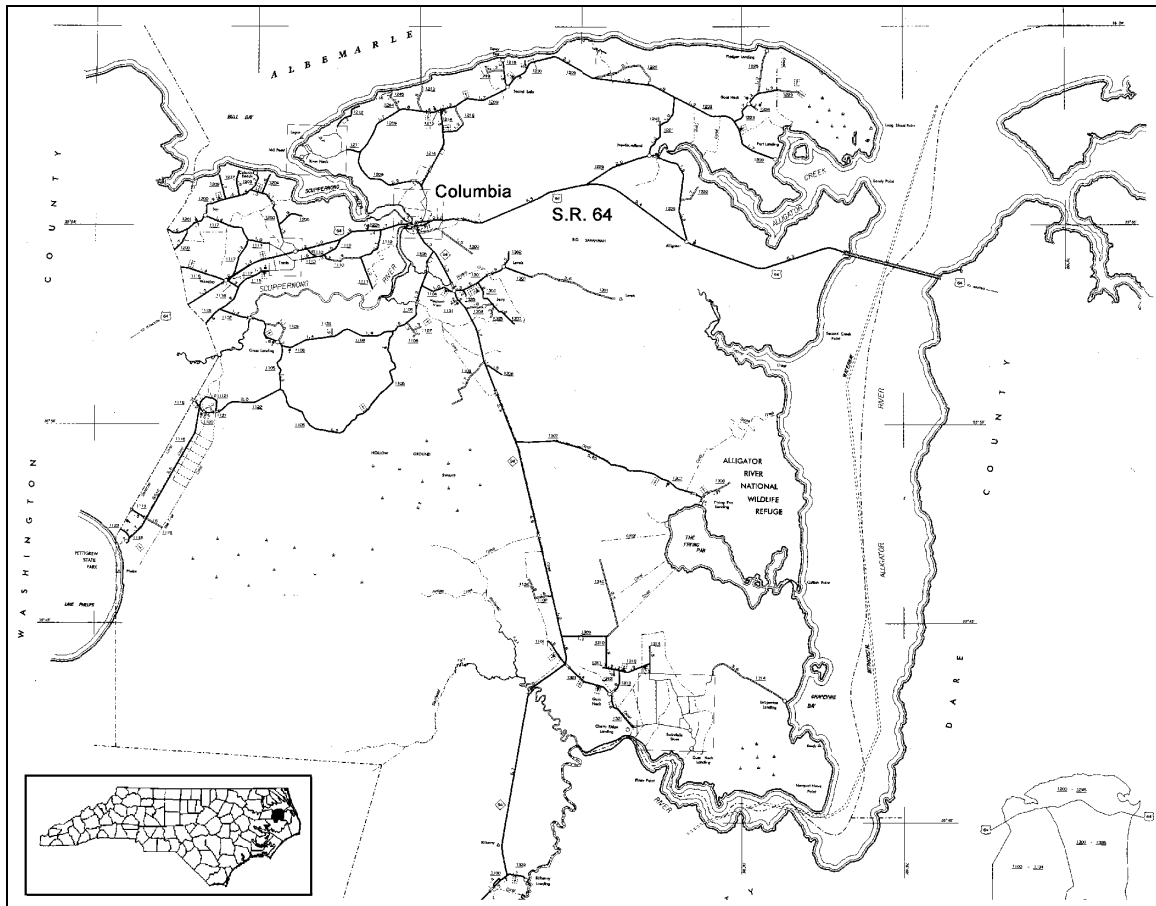


FIGURE 2. Map of Tyrrell County, NC

Source: NC Dept of Transportation, Division of Highways-GIS Unit Aug 24, 2000



Tyrrell County is listed as the poorest of North Carolina's 100 counties (Sexton 1993). Median household income in 2000 was \$25,684, with per capita income at \$13,326 (NC Rural Economic Center, Inc. 2000). The 2000 population of Tyrrell County was 4149 people, with 56.5% Caucasian, 39.4% Black or African American, 0.7% Asian, and 3.4% Other (US Census Bureau 2000). By 2004, Tyrrell County median household income had increased to \$31,000, with the African American's median household income at only \$16,000 (*pers comm.*, TCCDC April 2004).

Tyrrell County has 390 square miles of land area, with a population density of almost 11 people per square mile. Of its 260,000 acres, 75% is farmland, generating \$34,664,000 in total agricultural receipts in 2000; 93% of farms are family-owned (NC Rural Economic Center, Inc. 2000). In excess of 35% of the land in Tyrrell County is off the tax base, owned by federal & state wildlife refuges and protected areas, as well as private not-for-profit or religious organizations. This puts a tremendous tax burden on residents and local businesses to make up the difference in tax revenues for county services.

Land prices have risen dramatically in recent years, with new residential and commercial development and sales of property to non-local buyers and large organizations, such as the Church of Jesus Christ of Latter Day Saints and Weyerhaeuser. In Hyde County, where the only jobs are farming, fishing, county offices and schools, a one-acre lot on Mattamuskeet Lake is now valued at \$50,000, a price that exceeds the affordability of many of these residents.

The town of Columbia is Tyrrell County's only incorporated town, located on the east side of the Scuppernong River at the Abermarle Sound. Downtown Columbia is a one-block jog off of the main Highway 64, and consisting of a quaint Main Street with shops, hardware store, Ben Franklin store, realtors, and county and town offices. As Main Street dissolves into residential areas, one bed & breakfast is available for visitors. The town would like to become known as a tourist destination, attracting a percentage of tourists on their way to or from the Outer Banks. Since 1989, Tyrrell County has looked at nature-based tourism as a possible solution to generating revenue for the county and its residents (Sexton 1993).

In 2003, more than 49 million visitors traveled to NC; it is the sixth most visited state in the USA. Its domestic tourism expenditures directly supported 183,220 jobs, with traveler spending generating \$1.1 billion in state and local tax receipts. Almost 90% of travelers come to NC by auto or recreational vehicle (NC Commerce 2003).

TABLE 1. NC County Tourism Impact, 2002

County	Domestic Tourism Impact	Travel Impact Ranking	# Jobs in Tourism	Payroll	Tax Revenues
Tyrrell	\$2.85 million	99 th	20	\$350,000	\$440,000
Hyde	\$23.66 million	68 th	420	\$5.73 million	\$2.57 million
Dare	\$572.53 million	4 th	10,980	\$149.52 million	\$57.84 million

Tyrrell County ranks 99th out of NC's 100 counties on the amount of tourism revenue to its area (Table 1). In 2002, tourism in Tyrrell County brought in \$440,000 in tax receipts, supported 20 jobs and had an economic impact of \$2.85 million. However, as Tyrrell County is situated just 35 miles inland from NC's Outer Banks, it is primed for overflow of Outer Banks tourists and service jobs. As comparison, Dare County, home of the Outer Banks, brought in \$57.84 million in tax receipts, supported almost 11,000 jobs and made an impact of \$572.53 million in 2002 (NC Commerce 2003).

In 2000, the U.S. Census calculated 1537 occupied housing units, and 495 vacant units in Tyrrell County. Already, we were told, current Outer Banks service personnel are looking to move to Tyrrell County, as housing prices in Dare County are becoming increasingly unaffordable. Development is moving to Tyrrell County at a fast pace, with

many new residential villages, and related services, under construction (Interviewee #4, 2004).

The Red Wolf Coalition has been planning for several years to build a Red Wolf Center near Columbia, NC, and, at the time of this study, had completed a draft, preliminary concept plan of the Center, and proposed its location on land off of Hwy. 64. Its full design and exact location are still to be determined, but this Center is a primary mission of the Coalition (Red Wolf Coalition 2004).

These counties are well known for the hunting of bear, waterfowl, deer, quail, and other game (Haire, *et. al.* 1996). Hunting groups have become investors, seeking to provide hunting privileges at healthy profit margins. In response, the numbers of waterfowl impoundments have increased dramatically in recent years.

METHODS

COMMUNITY RESEARCH

Community participation is critical to the development of ecotourism which can promote conservation of wildlife. It is well-documented that without community support, conservation of natural areas and wild lands is both frustrating and futile (Maikhuri, *et.al.* 2000; Ascher 1995; Hart and Castro 2000; Wells and Brandon 1992).

Rapid Rural Appraisal (RRA) and Participatory Rural Appraisal (PRA) techniques have been widely used as qualitative methods of inquiry to gain necessary community-based support and information (Chambers 1994; Chambers 1995). When using RRA/PRA, it is required to tailor these techniques to each site and specific study. Unlike quantitative methods, qualitative methods are both flexible and inclusive, with each study as a unique approach and analysis. “Qualitative analysis ultimately depends on the analytical intellect and style of the analyst. The human factor is the great strength and the fundamental weakness of qualitative inquiry and analysis” (Patton 1990:372).

The objective in qualitative analysis is to look for patterns, by gaining as full a range of responses as possible from the community under study on which to base decisions, and by using a variety of data sources to build and validate conclusions (Bernard 1995). This study incorporates that objective, and follows specifically the methodology, based on RRA/PRA qualitative techniques, developed by REAP – Rural Ecotourism Assessment Program (Lash and Austin 2003).

Survey Sample And Study Periods

Informants were selected based on two sampling strategies: 1) stratified purposeful sampling (subgroups of farmers/guides/fishers; business owners/developers/educators; general residents/youth; and agency/government/NGO staff), and 2) snowball sampling (where one informant leads to another; Hudelson 1994; Johnson 1990; Patton 1990).

This study began in January 2004, and was conducted by two researchers. Preliminary data were gathered on Tyrrell and Hyde Counties, their histories and current land uses, existing organizations, and previous ecotourism and red wolf studies, as well as meetings with community organizations to solicit participation in this study. Community members were interviewed over an eighteen-day period, during March and April 2004.

Data Sources, Interview Questionnaire, And Analysis

In-depth, semi-structured questionnaires, as well as focal group meetings, and ad hoc conversations were conducted with 32 residents, over 50 high school students, and 19 key informants. Interviews were held, in most cases, at the person’s place of business or home. Interviews were usually around two hours in length, ranging from 1 to 5 hours. Both researchers attended all resident and key informant interviews, and group meetings.

Key informants were used to gather data on the history of the Red Wolf Recovery Program, history of the counties, town life, political, social, and economic structures, and tourist information. All interviews were voluntary and confidential, with statements and opinions scored without attached names or identifying characteristics.

Community data were analyzed in April and May 2004, prior to the market portion of the study. Respondents' categories of concerns and ecotourism abilities were listed and tallied, and a community SWOT (strengths, weaknesses, opportunities and threats) analysis performed. After the community data were analyzed in May, these results were used to produce the market demand survey tool, using the list of local supply opportunities.

TOURIST RESEARCH

Survey Sample And Study Periods

This study was focused on investigating the responses of tourists coming to the Outer Banks during the 12-week summer "high season"—our survey population. Our survey sample of informants was selected from the sample frame of all visitors to the area's Visitor Centers and the Aquarium during the survey period that June. By using these places as survey sites, the sample would consist of individuals from various backgrounds and travel interests, as well as those visitors interested in nature-based activities.

Market demand surveys were conducted over a five-day period in June 2004. Tourists were interviewed at: 1) Tyrrell County Visitor Center in Columbia, NC, 2) Outer Banks Visitor Center in Manteo, NC, 3) Aycock Brown Visitor Center in Kitty Hawk, NC, and 4) the NC Aquarium on Roanoke Island. As check-in and check-out of new visitors usually occurs on Saturday and Sundays, the study period was arranged to include these heavily-populated weekend days.

Coverage error occurred because not all visitors to the Outer Banks stop at one of these Visitor Centers and/or Aquarium. For example, according to the North Carolina Department of Commerce (2005), the Aycock Brown Visitor Center received approximately 46,000 tourists in June 2004, out of a possible estimated 800,000 visitors to the entire Outer Banks that month. This calculates to only a 6% visitation rate to this Center that month. By surveying at several different Centers/locations, this study aimed to increase its contact with different visitors, and expand its coverage. And, because our target audiences were visitors to the Outer Banks areas, and these locations are designated to capture those subjects, this sample frame provided the best opportunity to capture a reliable survey sample, from which to draw conclusions.

Data Sources, Survey Questionnaire, And Analysis

Survey forms were administered to a total of 202 visitors. The main Outer Banks Visitor Center at Manteo was surveyed twice – once, on a weekday, as a training opportunity and run through by the researchers, and later on a busier weekend day.

Informants were selected by approaching at least one to two visitors per group, as each group of individuals entered the location. Adults were chosen, or occasionally an adult and their child. All youth were surveyed with adult permission. Visitors were asked to answer the first few questions read by researcher, and then to fill out the rest of the survey instrument by themselves (starting with question 8) on their travel interests and demographic information. Researchers were close by to clarify questions, if needed, and collect completed surveys. On average, the survey took most respondents five to seven minutes to complete.

In order to determine potential interest of surveyed tourists in local ecotourism activities, qualities, and services, the survey instrument was based on community supply responses presented in this study that exist or could exist in Tyrrell and Hyde Counties. Sources for descriptions of a proposed Red Wolf Center were extracted from a preliminary concept plan by the Red Wolf Coalition, as shown on the RWC website (Red Wolf Coalition 2004).

Tourist data were analyzed using Excel for the Macintosh. Only descriptive statistics and willingness to pay figures were calculated, with no regression analysis performed for this report.

DATA REPORT AND PRESENTATION

A PowerPoint presentation was created in August 2004 of data summaries and conclusions from both community and tourist surveys. It was presented and discussed at a public meeting on 12 August 2004 in Columbia, NC, in order to verify results and solicit public comments about the study. Additionally, some of these data were also presented at an ecotourism training workshop, put on by TCF and TCCDC, on 14 August 2004 in Columbia. After these public presentations, Lash & Black compiled and wrote a draft of this report, "Red Wolves: Creating Economic Opportunity through Ecotourism in Rural North Carolina" and submitted it to Defenders of Wildlife for review. Comments from Defenders and others were used to modify the draft report into its final form.

These data were also used to create an AZA (American Zoo and Aquarium Association) presentation for the Carnivore Taxon Advisory Group (TAG) in September 2004, as well as a presentation at the Carnivore Conference in November 2004 in Santa Fe, NM.

This final report was placed as a PDF on both the Defenders web site (www.defenders.org) and the Ursa International web site (www.ursainternational.org) and also was distributed in printed form to key stakeholders and foundations. This report is available for use by local and regional North Carolinian organizations and individuals to help generate funding for specific community programs and community-based ecotourism ventures.

COMMUNITY RESULTS

“The best way to protect the environment is to educate the people, and you can’t count on the government to do it.” Interviewee 23

Landowners and general residents in Tyrrell and Hyde Counties were interviewed to determine their interest in red wolves, in ecotourism, and their capacities to provide ecotours based on red wolves, other wildlife, and area assets. These data were then used to survey Outer Bank tourists for participating in these activities (see Tourist Results section). Beyond these tourism activities, community attitudes are indicative of local support for the red wolf, and the continued desire, or not, for future rural lifestyles and livelihoods.

These community results present data from Tyrrell and Hyde County residents on: 1) general issues of concern; 2) conservation attitudes; 3) attitudes towards red wolves; 4) attitudes towards tourism; 5) attitudes towards visitors; 6) what ecotourism attractions exist in Tyrrell and Hyde Counties; 7) what ecotourism ventures residents want to provide; 8) what residents need to start ecotourism businesses; and 9) what future developments are desired by residents.

Target groups were: Farmers, land managers, fishers, guides, business owners, restaurant and B&B owners, Red Wolf Coalition, Chamber of Commerce, U.S. Fish & Wildlife Service, Partnership for the Sound, Ecotourism Steering Committee, protected area personnel, civic leaders, and tourism professionals. We were able to interview representatives from all of these groups, as well as attend meetings and solicit comments from the Chamber of Commerce and the Ecotourism Steering Committee.

Community members interviewed, by type, were:

51 adults:

- 14 farmers/guides/fishers;
- 13 business owners/developers/educators;
- 8 general residents; and
- 16 agency/government/NGO staff

50+ high school youth

All community results documented here represent a listing of responses from residents, not a quantitative analysis of percentages mentioned. Responses span a broad range of local opinions, and many, if not all, were mentioned by multiple interviewees from different type groups, thus validating that we had collected a full spectrum of attitudes and opinions from community residents.

1. GENERAL ISSUES OF CONCERN

The following broad issues of concern were mentioned frequently by diverse respondents in Tyrrell and Hyde Counties, express that residents are primarily concerned with:

- Lack of jobs, economic growth which will give their children opportunities to stay in the area and earn a good living;
- Amount of land owned by/used for public lands, refuges, etc. Government ownership (both federal and state, such as USFWS lands), and tax-exempt private lands (churches). The concern here is two-fold: This ownership lowers the tax base, creating an unfair tax burden on “average citizens” in the county, and second, this land is not usable for farming or other economically viable production;
- Hunting costs in maintenance and repair. Hunting is appreciated as a primary past-time and occasional economic benefit for landowners, but it also negatively impacts non-landowners, especially those who are leasing farms. Farmers must bear the cost of repairs for damages created by hunters (road maintenance, crop damage, etc.);
- Rising land costs. Land in Tyrrell and Hyde is being sought highly by outside groups, resulting in escalating land costs (which prohibit average citizens from buying and maintaining land for their families), and in raised taxes (to cover additional expenditures needed to support greater population and land use). Primary land purchases fit into the following categories:
 - Outside developers (Outer Banks developers or those who plan to bring in commercial operations or higher density housing);
 - Large organizations buying land for long-term investment (Church of Jesus Christ of Latter Day Saints; Weyerhaeuser);
 - Hunting groups or investors seeking to provide hunting privileges at healthy profit margins (for waterfowl impoundments, hunt clubs);
- Lack of cooperation and communication from and with Federal entities, specifically, USFWS and DOT. Residents feel that government is overly interfering into private lives. Residents stated that: standard highway engineering is not appropriate for marshland regions; DOT splits up private property for highway construction; USFWS often accesses private land as though it is public land; and USFWS is withholding information about the red wolf reintroduction program. Additionally, they see the OLF as a severe threat to their region and future economic development, with little control or input;
- Ability to control or manage economic development so as to preserve the things that make them want to live in Tyrrell or Hyde counties. Residents place a high value on maintaining the local beauty, slower pace, lower population, and small-town friendliness. But they also want to provide more services to residents and job opportunities for their children;
- Being overrun by tourists spreading from the Outer Banks, and becoming a less attractive but equally busy Outer Banks “hub” or a “bedroom community” for the Outer Banks.

“USFWS are a primary landowner and they’ve got to be a part to make it work. And it won’t be a quick thing.” Interviewee 38

WHAT DOES THIS MEAN FOR RED WOLF ECOTOURISM?

Residents see their area as changing, and they both fear and embrace the change. They want choices, and a voice in how development occurs, and fear that government is preventing that voice by its influence of the OLF, Red Wolf Recovery Program regulations, and rising tax costs with new development. Further, residents fear that as developers and tourists come in, the power will transfer into non-local hands, and the opportunity for red wolf ecotourism may be lost for locals.

2. CONSERVATION ATTITUDES

Conservation attitudes in Tyrrell and Hyde counties are varied, and strongly expressed. Appreciation for wildlife and the unspoiled beauty of the area is almost unanimous. Hunters and non-hunters, townspeople and county farmers, all widely respect the efforts to maintain these beautiful and rural qualities.

County residents expressed that they often bear the greatest burden of conservation. Although there is appreciation for the animals and land by county residents, there is also frustration and bitterness about regulatory measures that are increasingly complex and often ineffective, as they see it. Farmers are focused upon the challenges of their changing industry and slimmer profit margins, and this makes it more difficult for them to accept environmental regulations that seem unnecessary and burdensome.

WHAT DOES THIS MEAN FOR RED WOLF ECOTOURISM?

Conservation attitudes are perfectly aligned with red wolf ecotourism goals, as residents want to preserve their predominantly rural, natural setting in the same ways that ecotourism seeks to protect it.

3. ATTITUDES REGARDING RED WOLVES

Attitudes regarding red wolves are also mixed, but by all indications the initial levels of frustration and anger felt by many members of the community have lessened.

NOTE: for this report, the term “landowner” is used to describe actual landowners, as well as farmers or others who lease and use the land.

Townspeople predominantly expressed appreciation for the red wolf and the recovery program, and primarily viewed the red wolf as an area asset that can attract tourists and thereby aid their community.

County residents and landowners expressed more complex views, many stating that they have come to a “respectful acceptance” of the red wolves as animals, and they now have greater knowledge about red wolf behavior and its effects on their region than they had in the beginning of the program. Some landowners readily differentiate between their attitudes about the wolves themselves as opposed to their feelings about the recovery

program and about USFWS. But landowners still have frustration with the amount of funds being spent on the program, and other attributes detailed below. Frustration with government regulations (and regulatory agencies) in general spills over into the USFWS recovery program, but most landowners readily name two or three USFWS employees whom they personally like and respect.

Landowners still have long memories about early communications by Red Wolf Recovery Program authorities (from USFWS) which turned out to be misleading or incorrect, as wolf behaviors changed or became better known over the years. Almost all landowners expressed a desire for more consistent, complete and candid communication from USFWS about the program, as most think there are facts still being withheld from locals and the public in general (birth data, future of the program, hybridization, etc.).

Primary Landowner Problems With Red Wolves And The Recovery Program

Summary of problems stated by respondents regarding the Red Wolf Reintroduction Program, listed in order of issue most commonly expressed:

- “Spending boatloads of money for something that is worth nothing.” This is the most commonly expressed sentiment among landowners and farmers. However, these respondents also said that if red wolves can bring revenue into the community through tourism, then wolves could be seen as an asset;
- Landowners still feel the sting of early treatment by FWS, especially recalling FWS officials saying that government authorities can come onto land anytime they want and do anything they want, while landowners are prevented from doing anything to disturb or harm the wolves. This attitude as expressed by respondents seems to be an extension of an overall feeling by locals that government regulations can be needlessly imposing, and some administrators arrogant or uncaring;
- “Outsiders vs. locals” hired with FWS. Locals are upset that the program has not benefited their community by bringing program dollars to residents through jobs;
- Red wolf is a coyote hybrid. Landowners widely expressed the belief that there are no or few true red wolves here, as there has been so much cross-breeding with coyotes;
- This area is not the original habitat of red wolves. Respondents cited marshy terrain, lack of physical evidence and anecdotal stories from ancestors as reasons for thinking this area specifically was not a true home to original red wolves;
- FWS is lying about the red wolf. Landowners feel FWS has not been truthful about hybrids, habitat, release locations, danger to kids, and wolf behavior, including packing, hunting, and food sources;
- Danger to kids. Landowners expressed this sentiment as a range: from full fear for their children, to simple caution that red wolves are wild animals and therefore unpredictable, and so to be treated with caution.

“About the only way we know we’ve got a red wolf is if they’ve got a collar. I can’t tell a red wolf from a coyote unless it’s collared.” Interviewee 38

Residents & Red Wolves: Benefits

Summary of benefits stated by respondents regarding the red wolves and the Red Wolf Recovery Program, in no particular order:

- Red wolves can be a tourist attraction for Tyrrell and Hyde Counties. Even landowners who had negative attitudes toward red wolves said they would see this benefit if the Red Wolf Center can act as a draw to bring tourists and provide economic benefits to the area;
- Residents like the sight and sound of red wolves;
- Red wolves lower populations of nuisance animals. Examples include nutria, sickly deer, etc. This is seen as beneficial in keeping deer populations healthy, which some hunt club managers see as providing for better hunting. It also reduces crop losses to deer;
- Red wolves lower the repair costs necessitated by nuisance animals. Examples include elimination of costs of controlling nutria by paying trappers, and lowering nutria digging and therefore curbing road and dyke maintenance costs;
- Quail population increase. Red wolves help to restore the natural predator chain; red wolves kill foxes and raccoons which has helped increase the quail population;
- None. Some residents responded that red wolves provide no benefit they can see.

Residents & Red Wolves: Costs

Summary of costs listed by respondents regarding the red wolves and the Red Wolf Recovery Program, in no particular order:

- Tax dollars for red wolf programs. Again, this is the most widely expressed grievance;
- USFWS hires non-local staff. Hired personnel are not originally from the local area, even though they live in the area;
- Farm maintenance from USFWS trucks. Farmers state that FWS personnel drive over their lands in any weather, at any hour, harming roads and increasing their maintenance costs;
- Red wolf program incentives paid to landowner, rather than the farmer. For any incentives paid by the Red Wolf Recovery Program to landowners who have wolves on their land, farmers (those who lease the land) point out that these incentives are not passed down to them, and they have to bear the costs of having the wolves, maintaining the area, and allowing access to FWS trucks and personnel, which creates an unfair burden;
- Red wolves reduce deer and duck populations. This is seen as infringing upon local hunting rights, and jeopardizing the ability to rent out lands to hunt clubs.

Beliefs Residents Have About Red Wolves

Beliefs about red wolves stated by respondents are presented here as ideas, opinions, and beliefs, with no comment on whether they are factually accurate or inaccurate. Note that these are reported as stated, and placed in no particular order.

- Government spends too much money on red wolf programs
- Red wolves are coyote hybrids
- Uncertain whether red wolf is a true species
- Red wolves are not indigenous to the area
- USFWS can come onto resident lands anytime
- USFWS gave out incorrect red wolf information, and does not communicate true facts to locals
- Red wolves are dangerous to pets, livestock, and people
- Red wolves are not going to bother people
- God removed the red wolf; if recovered, they should survive on their own
- If red wolf is a viable species, why is USFWS “babying” them?
- Any species that man eradicates (or almost), man should do whatever is possible to recover and preserve that species
- Red wolves keep deer population under control, which is good for crops
- Red wolves do not affect deer populations, just move the deer around

Residents & Red Wolf Tourism

Summary of ideas or opinions stated by respondents when asked about whether red wolves could affect tourism in Tyrrell and Hyde Counties:

- If red wolves can be used as a marketing draw to bring tourism (and tourist dollars) into the area, people will feel better about having red wolves around (100% of respondents expressed this opinion);
- They think people will want to come to view red wolves, both in the wild and in the proposed Red Wolf Center;
- People will rarely be able to see a red wolf in the wild, as they are shy;
- USFWS should continue the howling trips;
- Hunters should be allowed to hunt one (or more) red wolves per year, made available through a lottery or drawing;
- Can charge people to work or volunteer with USFWS to assist with red wolf programs;
- The Red Wolf Center is necessary in order to have viable red wolf tourism.

WHAT DOES THIS MEAN FOR RED WOLF ECOTOURISM?

Attitudes about the red wolf and the red wolf program are malleable, more open now than ever before. If the area is effective in creating attractive ecotourism ventures, and using the red wolf population as part of the draw for those economic benefits, residents’ full acceptance of and pride in being the world’s only (or primary) wild red wolf habitat is probable.

4. ATTITUDES REGARDING TOURISM

“We need organized development and planning before this thing runs over us. We have the power right now, but we won’t have the power long.” Interviewee 33

Tourism is seen as a mixed blessing, but predominantly as something that will benefit their community in the long run. Residents are concerned about becoming another Outer Banks, in terms of crowds, traffic problems, costly infrastructure, rising land costs and taxes, and unchecked development that preserves very little of their current natural peace and beauty.

On the other hand, residents greatly desire economic growth for their community, and many residents think ecotourism, marketed to tourists who value the area for those natural qualities, can bring income to the community and attract more desirable services also for local residents.

Other residents expressed appreciation that ecotourism usually attracts more highly educated, respectful visitors; and that ecotourism as an industry typically brings in many small businesses which each hire several people, allowing for variety of job opportunities, and greater opportunities for local entrepreneurship. Many residents like the idea of service industries that aid other entrepreneurs, such as computer services, insurance agencies, health care or other professional trades that provide good wages and support both residents and tourists.

Residents expressed a love/hate attitude regarding zoning, a necessary component of “smart planning” for tourism. Respondents, especially landowners, hate to give up what they see as control over their property and their individual rights as citizens. But a few respondents also mentioned experiences where zoning guidelines, if they had been in place already, would have prevented a problem they now have. These stories indicate that Tyrrell and Hyde Counties are already beginning to feel the burden of uncontrolled and unplanned development and more people are starting to think “smart planning” can help ease the pain of their counties’ growth. As one resident said, “You don’t want to be controlled, but you don’t want to be controlled by the tourists either” (Interviewee 40).

Residents & Ecotourism: General Concerns About Doing It Themselves

Summary of responses by residents when asked about their concerns of providing an ecotourism business themselves:

- No time to start an ecotourism business myself;
- Expenses: Start-up costs and continued funding would be difficult;
- Liability and insurance costs can be prohibitive;
- Potential damage by visitors to land, crops and equipment;
- Regulations and licensure are hassles;
- Fear the community won’t agree on what to do with ecotourism in the area, and how to do it.

WHAT DOES THIS MEAN FOR RED WOLF ECOTOURISM?

Ecotourism is seen by residents as a desirable, economic and environmental option, that most will embrace if development comes with a measure of local control. Ecotourism advantages include the industry's ability to provide jobs for all ages, the many and varied options for entrepreneurship, and preservation of a heavily rural or wilderness environment. However, residents' attitude that building the ecotourism industry must be planned, instigated, and funded by outsiders; while at the same time wanting local control; is a prevailing paradox that indicates the potential for early struggles.

5. ATTITUDES REGARDING VISITORS

Residents were asked about past experiences with visitors, and future desires for tourists. Past experiences were divided into four categories: tourist visitors, hunters, USFWS personnel, and others. Respondents were also asked about rules they would require for visitors. Responses are listed as follows, in no particular order.

Residents & Visitors: Tourist Profile Desired

- Families
- Educated adults without children
- Senior citizens, affluent retirees
- Hobbyists, such as birdwatchers, naturalists, hikers, boaters, hunters
- Urban families wanting farming knowledge
- Not targeting kids seeking thrills

Residents & Visitors: Past Experiences

Respondents were asked about four categories of visitors, including tourists (if they had had any tourist experiences), hunters, USFWS personnel, and other visitors. In general, respondents cited past tourist experiences as pleasant, and hunters as disrespectful and undesirable; attitudes about FWS personnel were influenced by attitudes about government policies in general, but many of the FWS people themselves are appreciated; and other visitors provoked varied comments.

"Tourist" visitors

- Included photographers, corn maze visitors, kayakers
- Photographers were very polite and respectful
- Naturalists (biker, canoeist, camper) didn't spend much money, just bought gas
- Love talking to people, so we liked the visitors
- Had no problems with visitors

Hunters on land as visitors

- Locals expect to come on your land and not pay; they think they do you a favor killing your deer
- Look on kid's face when killing first deer – money can't buy that
- Hunters disrespect landowners: Cause property damage, tear up roads, leave gates open, vindictive when their lease was withdrawn
- Cause competition between landowners, land prices rising and locals lose out to big business

USFWS personnel on land as visitors

- Disrespectful to landowner: Didn't handle the reintroduction well, telling people what they would or wouldn't do, can come onto land anytime without permission, trucks tear up roads because they come in any weather
- Love some of the FWS guys – they're good people, but one bad apple spoils the bunch
- FWS are a primary landowner here and they've got to be part of us to make it all work
- I see FWS briefly, no problems
- FWS has a false sense of what the reserves are for, you need farmland to feed the animals

Other visitors

- Youth riding bikes on land behaving badly; gates solved the problem
- Good experience with trapper/guide who was suspected poacher; I checked behind him and never had a problem
- Poachers are biggest problem; they come at night and take the best game

Residents & Visitors: Rules They Would Enforce

Residents unanimously said they would look for a high level of respect from visitors, including respect for their land, farm equipment and roads, and service personnel. Farm tour and wildlife tour operators would expect visitors to stay in the van or vehicle provided, not drive in the fields, and go only into areas where they were accompanied by their guide, unless otherwise directed. Wildlife tour proponents specifically mentioned the need for visitors to understand these are wild animals and therefore unpredictable; don't wander alone and don't be out at night. Residents mentioned not allowing alcohol or drug use, no excessive noise, and not wanting thrill-seeking kids tearing up roads with 4-wheelers. Residents also said they would have to research and ensure visitors followed all laws and safety regulations related to their tourist business.

WHAT DOES THIS MEAN FOR RED WOLF ECOTOURISM?

Residents are open to visitors who appreciate wilderness settings, and therefore red wolf ecotourism should be a natural and easy segue into a greater development of the region. Also, residents desire the kind of interaction with and respect for the environment that ecotourists typically exhibit, while setting boundaries and rules for visitors to follow.

6. COUNTY ECOTOURISM ATTRACTIONS

By far, respondents in Tyrrell and Hyde Counties love their area and its natural beauty, and want to see it preserved. Yet most seem unaware that the very thing they appreciate is also a tremendous tourist draw to outsiders who appreciate the same, and want to visit areas like this for the same beauty and serenity of nature. When questioned, locals showed by their responses that they are just beginning to think about what their area has to offer the ecotourist.

These items were mentioned by residents as likely ecotourist activities, and are listed in no particular order.

- Bird-watching from October to March on flooded lands: swans, eagles, falcons, Canada geese, snow geese, egrets, etc.
- Hired guides for photographers and bird-watchers
- Hired guides for hunting and fishing for non-locals
- Educational guides to talk about river, flora, fauna, farming
- Use of john-boats for nature tours on beautiful flooded woodlands
- Wildlife trails, viewing bear, deer, birds; convert logging trails for hikers
- Four-wheeler trails
- Bass tournament
- Amusement park
- History tours – Civil War, Native American, old cemeteries, Somerset Plantation
- Farming tours – education for tourists about high-tech industrial agriculture vs. old methods. Biotech, hybrid corn, seed reconditioning, greenhouse restaurant, experimental crop research like square tomato
- Kayaking and canoeing tours
- Bus tours for wildlife and farm areas
- Bed & Breakfast inns, small hotels
- Transportation services, shuttle operators
- Corn maze
- Water access, boating: Bulls Bay, Frying Pan, Lake Phelps, Mattamuskeet, Milltail Creek
- Restaurant/store like Cracker Barrel, from which bus tours operate
- Tours out of a central place like Timberlake area next to refuge; can see farming & wildlife
- Kayak & canoe tours from Creswell to Visitor Center, including guided tours and rental boats
- River cruise with sunset dinner
- Golf course
- Sport fishing; deep sea fishing
- Party boats out of Alligator Marina
- Seafood restaurant at Alligator Marina
- Arts & crafts, baskets from Alligator community
- Story-telling
- Artisans coop on Hwy. 64
- “Classy” fruit stand/farmers’ market or flea market on Hwy. 64

- Refurbish Mattamuskeet Lodge, create nice lodge with meeting facilities
- Make use of airport in Englehardt (can land 727s there). Create transportation/taxi service to and from airport
- Native plants nursery and organic garden
- Growing truffles, mushrooms for commercial use
- Boardwalks through swamplands
- Campgrounds at refuges, near marinas, on Scuppernong, at Alligator on the water
- Proposed EcoLodge at Palmetto Peartree Preserve, leased to concessionaire for economic partnership
- Water trip (canoe or pontoon boat) from town landing upriver, with carriage ride to Somerset Plantation for lunch
- Artists community with public art displays, more workshops, teaching seminars
- Bike riding, including rental bikes
- Sleeping hotel yacht docked at Columbia town harbor
- Marine repair business

WHAT DOES THIS MEAN FOR RED WOLF ECOTOURISM?

Tyrrell and Hyde Counties have strong potential for becoming an abundant ecotourism destination, and quickly. The red wolf can be used as a primary draw while other natural attractions will round out the ecotourist's vacation planner. The Outer Banks can be leveraged immediately as a provider of lodging and base-operations, as well as providing tourist clientele, while Tyrrell and Hyde can focus on creating day-trip activities. With an influx of tourists, local establishments can capitalize on that ready market. Red wolf specific activities, from the proposed Red Wolf Center to howling trips, can be part of a broad array that makes an ecotourist's decision to visit Tyrrell and Hyde an easy one.

7. ECO/AGRITOURISM ATTRACTIONS RESIDENTS WANT TO PROVIDE

Our surveys found that some residents have given considerable thought to ecotourist business opportunities that they think are viable and which they themselves would consider providing as the county tourism market grows. While most residents are just awakening to potential opportunities, some residents are eager, and a few are ready, awaiting only funding or time or some other specific need to be filled.

These items were mentioned by residents as tourism businesses which they would like to provide, and are listed in no particular order.

- Build boardwalk through swamp; give tours to see animals from hunting blind
- Talk with schools, Rotary Club, tourists about history, Indian history, and trapping; could do trapping tour, or take tourists to see red wolf in wild (with USFWS approval)
- Environmental tours, bird-watching, sunset walks to hear howling
- Corn maze, hay ride from parking lot
- Ecotourism after retirement: corn maze, wildlife viewing or hunting preserve, bird-watching, photography, hiking and biking trails

- Farm operations tours, especially educating children: see corn silking, tassels, corn maze
- Swan hunting, cotton picking day, growing blue/pink/green cotton. Open an art gallery
- Farm tours: ride a combine; Swan Quarter Ferry tour; Wildlife viewing with a meal
- Education on seafood industry: Shrimp trawlers, boating
- Charter boat for deep sea fishing
- Artwork for tourists – cards, prints
- Social Director and Tour Guide
- Clean vacation homes
- Guiding -- take people to refuges
- Harvest tours – June for wheat; August/September for corn
- Provide transportation – 15-person bus
- Restaurant/store for ice cream and baked goods; have locals sell jams/jellies on consignment
- Tracker rides
- Pumpkin patch – pick for \$1
- Seed cleaning tour
- Corn maze with evening bonfire, s'mores, picnic tables, farmers' market
- Farm tours every 2 hours, then take to museum and restaurant to tie in other local businesses
- Sell cookbooks and Tyrrellian group products
- Cabin at Frying Pan Lake with boardwalks
- Build Waterfowl Heritage site and museum
- Photography tours (off hunting seasons)
- Turn home into small bed & breakfast inn for overflow only
- Create rustic dorm/lodge for birders or naturalists, with small gift shop
- Camping space near Palmetto Peartree Preserve, refuges
- Boat cruise around waterways, to Edenton, package with B&Bs
- Crab shedding tour
- "Basket market" for seafood, produce, organic cheeses

WHAT DOES THIS MEAN FOR RED WOLF ECOTOURISM?

Many residents are considering personal involvement in ecotourism businesses, with some residents almost ready to begin. Because not all residents can or should be involved in the early wave of business creation, the few who are ready can partner with outside providers quickly, providing a fledgling industry which other residents can then join, or use as models or incentive for their own businesses.

Landowners cannot truly provide direct red wolf activities, as the wolves are wary, not easily spotted, and are protected by federal regulation. Therefore, adjunct eco- and agri-tourism activities can be created and marketed, and then packaged with red wolf activities as those become available.

8. WHAT RESIDENTS NEED TO GET INVOLVED IN ECOTOURISM

“You don’t have a middle class here. You have superior landowners and you have people who are paying off their refrigerator at Sears.” Interviewee 28

Respondents were asked what needs must be filled in order to create ecotourism in the area, and specifically to go into business themselves (if they were interested in doing so). Almost all mentioned funding, with training being a close second choice. The need for youth involvement and programs to enhance youth interest is high on the list as well.

Needs stated include the following:

- Awareness by residents of what the counties have to offer, and willingness to verbally promote it;
- Funding for start up businesses with easy terms. Sources mentioned include grants, government loans, small-business loans from banks;
- Partnerships with experienced operators who still allow for a high level of control for local business owner;
- Marketing training and assistance, specifically brochures, websites, press relations, advertising;
- Training in ecotourism: what works, what to expect, how to get started, rules and regulations regarding safety and insurance needs, specific ecotourism training (such as guiding, songbird species, boating regulations, etc.);
- Training in general business: customer service, accounting and bookkeeping, hiring and personnel laws, taxes;
- Elected officials who care and who take the time to understand and work for the small business owners;
- County zoning;
- Tourism Director, a planning board, and task force to study hunting;
- Red Wolf Center to draw lots of tourists quickly;
- Hyde County website;
- Beautification campaign: Clean up Highway 64, and potential public areas of counties;
- Conservation education, to preserve what residents’ love and the tourists want;
- Liquor by the drink in restaurants.

WHAT DOES THIS MEAN FOR RED WOLF ECOTOURISM?

Many residents are still awaiting an outside push, or at least a few more strong success stories, like Flemz Deli, Pocosin Arts, and the Brickhouse Inn, to motivate or provide a model. Also, though there have been ample studies, many locals still await further outside assistance before starting their own businesses.

Therefore, those wanting to see red wolf ecotourism become a successful and thriving industry, while balancing environmental and quality-of-life concerns, will need to address countywide planning, training and funding needs, provide opportunities for all age groups, and ensure early entrants have assistance in the early days of their businesses.

9. FUTURE DEVELOPMENT DESIRED BY RESIDENTS

“County zoning – I see it as a necessary evil. Call it ‘smart planning,’ maybe people will accept it. You don’t want to be controlled, but you don’t want to be controlled by the tourists either.” Interviewee 40

Residents were asked what types of development they wished to see in Tyrrell and Hyde Counties, and which types of development they specifically do not want, relative to ecotourism and county growth in general. Responses vary, especially between youth and seniors, but in general most respondents want development that still respects and preserves the natural beauty and serenity of the natural land.

Responses covered a wide range of topics, and so were divided into groupings: look & feel of the town, lodging, restaurants, retail, services, entertainment, general development, youth jobs, and what look & feel, and businesses, they don’t want. Specific responses, in these groupings, follow in no particular order.

Development Residents Want: Look & Feel

For the most part residents like the look and feel of “Small Town USA” and want a development plan that will model after towns like nearby Manteo, NC; Beaufort, SC; Eureka Springs, AR; and Savannah, GA’s River Street downtown. Specifics cited include:

- “Small Town, USA” or “Main Street, USA” with waterfront park, outside dining, quaint and varied shops.
- Pride and prestige of the area promoted as a desirable place to live and visit.
- Walk-able community with lighted alleys, parking lots, attractive storefronts, outdoor beautification such as flowerpots, colorful banners, streetlamps, etc.
- Clean sidewalks.
- Attractive and effective signage.
- Sightseeing and viewing trails and platforms for wildlife and environment; wide open spaces, serene backwoods settings.

Development Residents Want: Lodging

- Small hotels
- Motels
- Waterfront inn
- 50-room hotel with 800-number for reservations
- Elegant Bed & Breakfast to handle larger boats

Development Residents Want: Restaurants

- Seafood
- Nice bar/tavern
- Acoustic café
- Tea room
- Chocolate shop
- Restaurant/store like Cracker Barrel

- Chinese restaurant
- Fast food (50% want/50% don't want)
- Coffee shop
- Ice cream parlor
- Liquor by the drink in restaurants

Development Residents Want: Retail

- Bookstore
- Antique shop
- Art gallery
- Photography shop
- Gift shop
- Food stores, including specialty foods
- Clothing shops
- Blockbuster Video
- Games/Arcade
- Leather shop
- Linens & luxury items
- Shoe stores
- Wal-Mart (50% want/50% don't want)

Development Residents Want: Services

- Hair salon
- Dry cleaners
- Pharmacy on Highway 64 and downtown
- Bridge club for local residents
- Electrician
- Plumber
- Florist
- Internet café
- Healthcare (medical and dental) services
- General Columbia information kiosk

Development Residents Want: Entertainment

- Retro drive-in movie theater
- Community theater
- Amphitheater
- Veterans park with green space, gazebo and parking
- Waterfront park
- Dinner theater
- Softball field
- Playground with youth facilities, including skateboarding
- Symphony
- Music concerts

Development Residents Want: General

- Tasteful condominiums and apartments
- Rental properties
- Affordable housing
- Family recreation
- Crosswalks and stoplights on Highway 64
- High-tech businesses
- Environmentally sound businesses
- Community center
- Move offices out of downtown space

Development Our Youth Want: Jobs

One day was spent interviewing several classes of students at the local high school, and yielded the following variety of answers in response to the types of jobs that would keep youth in Tyrrell and Hyde Counties.

- Wildlife jobs – hands on
- Communications
- Law firm
- Computer technology
- Marine biology
- Retail: Wal-Mart
- Guides
- Veterinarians
- Automotive technician

Development Residents Don't Want: Look & Feel

Almost all respondents do not want to become another Outer Banks, nor do they want to be an Outer Banks' "bedroom community." Specifically, respondents said they do not want their area to look like: Nags Head, NC; Maggie Valley, NC; Gatlinburg, TN; Branson, MO; the Outer Banks in general, and Pirates Cove. Details are listed here.

- Houses "on top of each other"
- Absentee landlords
- Sprawl, bedroom community
- Increased taxes, prices
- County offices downtown
- Dirty streets, weeds, garbage
- Jet skis or All-Terrain Vehicles (ATVs)
- Destroying the environment for money
- Jammed billboards

Development Residents Don't Want: Types Of Businesses

- Heavy industrialization
- Casinos and large hotels
- High rises
- Wal-Mart (50% want/50% don't want)
- Malls
- Fast food (50% want/50% don't want)
- Junk shops
- Theme or amusement parks
- Golf course

WHAT DOES THIS MEAN FOR RED WOLF ECOTOURISM?

What residents indicate, almost unanimously, they want – and don't want – matches favorably with 1) the ideal setting for red wolf ecotourism, and 2) what surveyed tourists indicate they prefer. Effective, early planning, with broad local agreement, is critical to maintaining the quaint, historical look-and-feel in the towns, while reserving blocks for residential and commercial development, and for rural and natural activities. The harmonious blend of developed areas and wilderness is a perfect environment to support both the red wolf as a species and red wolf ecotourism as an industry.

SWOT ANALYSIS RESULTS

Ecotourism is as good as an industry can get. It's cleaner than factories, gives opportunities for a lot of people, gives a certain amount of pride and prestige to the natives that it's a desirable place to be.

Interviewee 44

SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis is a methodology used in business planning in a multitude of industries. SWOT has also been used as a consensus-building tool for community development, and in other Participatory Rural Appraisal (PRA) studies (Ministerial Conference 2000, Univ. of Illinois 2000). Strengths are internal to Tyrrell and Hyde Counties – like the abundance of wildlife, such as the red wolf and bear; Weaknesses are internal to Tyrrell and Hyde Counties – like the run-down appearance of Hwy. 64 at Columbia; Opportunities are external to Tyrrell and Hyde Counties – like Outer Banks tourism; and Threats are external to Tyrrell and Hyde Counties – like the Outlying Landing Field (OLF) development. Information from SWOT analyses can be displayed in a format that is easily understood by persons at all levels, and allows residents to see a concise picture of their community at a glance.

TABLE 2. SWOT Analysis Of Tyrrell & Hyde Counties

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> ➤ Local Environmental Resources ➤ Infrastructure In Place ➤ Walter B. Jones Visitor Center Complex ➤ Attractive Columbia Main Street ➤ Eastern 4H Center ➤ Protected Areas (Public & Private) ➤ Marketing ➤ Political Support ➤ Community Artistry ➤ Harmony Between County & Town Authorities ➤ Other Nearby Attractions 	<ul style="list-style-type: none"> ➤ Lack of Premier Attraction ➤ Lack of Awareness & Appreciation ➤ Infrastructure Not In Place ➤ Highway 64 Visual Lack of Appeal ➤ Lack of Visible Signage ➤ Insufficient Marketing ➤ Lack of Communication & Clarity Between USFWS and Locals ➤ Lack of Tourist Amenities ➤ Lack of Capital Funding for Private Ventures ➤ Attitude of Waiting for Outside Help ➤ Limited Focus of Tyrrell County Chamber of Commerce ➤ Governmental Use of Downtown Columbia Office Space ➤ Lack of Cooperation & Integration Between Black & White Communities
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> ➤ Outer Banks Tourism ➤ Red Wolf Center ➤ Public Funding Provided Via Government Agencies ➤ Outside Developers & Investors 	<ul style="list-style-type: none"> ➤ Outlying Landing Field ➤ Changes to Primary Local Industries ➤ Outside Developers & Investors ➤ Current Legislation Regarding Tax Credits ➤ Hurricanes

STRENGTHS

S1. Local Environmental Resources.

These counties provide beautiful natural settings, abundant wildlife – such as the red wolf and others, verdant fields, and a quiet and relaxed atmosphere that is increasingly important to urban tourists.

Partial List of Wildlife:

Red wolves, black bears, white-tail deer, coyotes, foxes, bobcats, raccoons, nutria, quail, ducks, Canada geese, herons, egrets, red-cockaded woodpeckers, tundra swans.

S2. Infrastructure In Place

Tyrrell County has made considerable effort and achieved solid results in creating a viable foundation to bring tourism into the region. Successful organizations and events now in place include:

- Partnership for the Sounds, a multi-county organization which has been instrumental in raising awareness of the area's waterways, constructing the Tyrrell County visitor center complex, and providing local training. Additionally, PFTS has a successful history in applying for and receiving grant funding for projects of the type needed.
- Tyrrell County Tourism Board, which now oversees the previously separate Ecotourism Steering Committee.
- Tyrrell County Community Development Corporation, which primarily focuses upon disenfranchised, low-income and minority development, is also set up to provide Entrepreneurship Training to residents as requested, and to assist new business owners in preparing loan applications and business plans.
- The Conservation Fund, which has a strong partnership presence within the area. Their primary public venue, Palmetto-Peartree Preserve, contributes to the tax base as well as providing ecotourism opportunities.
- Pocosin Arts & Crafts Center, which is steadily increasing awareness through advanced marketing activities of regional arts, crafts and scenic beauties.
- Festivals, which attract tourists, market local businesses and attractions, and enhance community spirit; now in place are the Scuppernong River Festival and the Rivertown Christmas Festival.

Local Organizations:

- Tyrrell County Chamber of Commerce
- Partnership for the Sounds
- Tyrrell County Ecotourism Steering Committee & Tyrrell County Tourism Board
- Eastern 4-H Environmental Education Conference Center
- Tyrrell County Community Development Corporation
- Pocosin Arts & Crafts

S3. Walter B. Jones Visitor Center Complex

This collaboration between: Tyrrell County, Partnership for the Sounds, Pocosin Lakes National Wildlife Refuge, and Department of Transportation has resulted in a beautiful and educational dual building complex, with a museum, small theater, gift shop, visitor center, restrooms, waterfront access and nature trail, and staff offices. The entire waterfront complex provides a very attractive tourist stop.

S4. Attractive Columbia Main Street

Columbia has made a significant effort to beautify Main Street, to include both a “Small Town, USA” ambiance and tourist friendly attractions (vintage street lamps, shop fronts, Brickhouse Inn, ice cream parlor, theater/museum, and gift shops).

S5. Eastern 4H Environmental Education Conference Center

This Eastern 4H Center has national appeal and marketing flexibility – they attract visitors with a variety of backgrounds and interests (both adult and youth groups, families and hobbyists). Their strength is educational agritourism, and currently the 4H Center can accommodate 140 overnight guests.

S6. Protected Areas (Public and Private)

Local areas such as Pocosin Lakes National Wildlife Refuge (PLNWR), Alligator River NWR, Lake Mattamuskeet NWR, Pettigrew State Park and Palmetto Peartree Preserve provide exceptional naturalist opportunities. Having all these protected area resources within close proximity is extremely beneficial, and rare in the Eastern U.S.

Wildlife Refuges & Sanctuaries:

- Alligator River National Wildlife Refuge – Dare Co.
- Buckridge Site, NC Dept of Environment & Natural Resources (NCDENR, division of Coastal Mgmt) – mostly in Tyrrell Co.
- Lake Mattamuskeet National Wildlife Refuge – Hyde Co.
- Palmetto-Peartree Preserve (P3) – Tyrrell Co.
- Pea Island National Wildlife Refuge – Dare (on Outer Banks)
- Pettigrew State Park – Washington Co.
- Pocosin Lakes National Wildlife Refuge – Tyrrell, Washington, Hyde Cos.
- Private landowners managing for wildlife, such as duck impoundments in Hyde Co.
- Roper Bird Sanctuary – Washington Co.
- Swan Quarter National Wildlife Refuge – Hyde Co.

These areas support a broad and abundant range of wildlife, which provide tourist appeal for wildlife hobbyists, bird-watching groups, photographers, and hunters. Waterways and hiking trails provide variety to the outdoor enthusiast, at levels that can please all, from avid athletes to seniors; and can offer variety to the Outer Banks visitor seeking a day or two of more serene water- or woods-based activities.

Protected area sites often include marked hiking trails and tremendous potential for other tourist amenities. As future plans, such as Palmetto Peartree Preserve's proposed ecolodge, become reality, these areas will attract even larger tourist groups, typically of the ecotourist profile. Ecotourists are highly desirable, in their respect for the land, low maintenance attitudes, preferences for active participation, and willingness to pay for quality experiences.

These protected areas provide great assistance to the area in marketing and education, via outreach personnel, visitor centers, guidebooks, websites, collateral materials and many educational programs. Potentially, parks and refuges may provide partnering opportunities with local residents for business opportunities in the form of concessionaire relationships (kayaking or trail guiding services, etc.).

S7. Other Nearby Attractions

Several attractions exist nearby which provide specialized opportunities for tourists seeking historical education (pre-Civil War and Native American culture), arts & crafts, outings, or beach activities.

Other Nearby Attractions:

- Somerset Place, Creswell, NC
- Lake Phelps Indian Artifacts, Creswell, NC
- NC Estuarium, Washington, NC
- A myriad of Outer Banks attractions

S8. Marketing

The new Tyrrell County website (www.visittyrrellcounty.com) is appealing and easy to navigate. In addition, websites for the local NWRs provide tourist information. The new Tyrrell County brochure is attractive, and stands out on the Visitor Center racks. Next steps will be to ensure people see the brochure and the website.

S9. Political support

Political support for the area is highlighted by: US Representative and Tyrrell County native Walter B. Jones, Jr., and NC Senator and Manteo (Dare County) resident Marc Basnight. These governmental servants have been extremely helpful in obtaining support for the area's local growth, as well as conservation of its natural beauty.

S10. Community Artistry

Efforts and involvement by Pocosin Arts, and members of the Alligator community in Tyrrell County, have created an artistic and cultural awareness, which can be used to draw increasing numbers of art enthusiasts to the area.

S11. Harmony Between County and Town Authorities.

The smooth working relationship between the town of Columbia and Tyrrell County is exhibited in their sharing of grant funds and working together on tourism planning.

WEAKNESSES

W1. Lack Of Premier Attraction

Despite the abundance of natural assets, there is no premier attraction in the Tyrrell/Hyde County area to draw in tourists, other than the Tyrrell County/Walter B. Jones Visitor Center Complex at the Hwy. 64 bridge in Columbia. Hunting is big business, and these counties draw many hunters per year, but other than this, the wildlife and natural assets are not packaged into any viable, major attraction for which the area is known. This is fundamental to the success of ecotourism in these counties – that there be one (or more) major attraction as a marketing keystone.

W2. Lack of Awareness and Appreciation

There exists a lack of awareness by Tyrrell and Hyde County residents of what the area has to offer, its attractions, and its appeal to outsiders. Many residents surveyed were uncertain as to why tourists would want to visit the area, other than for Outer Banks activities.

W3. Infrastructure Not In Place

Zoning or “smart planning” guidelines are not yet available for Tyrrell or Hyde County – plans that would locate various types of development, from housing to industry to retail, in order to achieve balance and be attractive to both tourists and residents. Residents requested plans specifically for waterfront and historical areas. Additionally, physical infrastructure is lacking for the increasing residential population, including housing, utilities, waste treatment, etc., but these are in the process of being addressed by town and county governments.

W4. Highway 64 Visual Lack of Appeal

Currently, Highway 64 coming into the Columbia area contains abandoned buildings, weed growth, and a run-down appearance, which urges tourists to keep driving through rather than stop and enjoy the area.

W5. Lack of Visible Signage

Current signs for Tyrrell County Visitor Center and Pocosin Lakes NWR Visitor Center are small, and not visible by visitors in cars coming east over the bridge. Large signs on the Visitor Center rooftops, or some sign visible from the bridge, would attract tourists as arrive into town, and give them an opportunity to plan to stop.

W6. Insufficient Marketing

Clearly, a good start has been made in marketing Tyrrell County, but general tourist data tells us that most tourists – including Outer Banks visitors – are still unaware of Tyrrell and Hyde Counties and their offerings. Some specifics include:

- Lack of focus within the Tyrrell County Visitor Center on Tyrrell County specific attractions. TC brochures are not dominantly displayed, and have no special signage – they are located on a wall behind a freestanding rack offering Outer Banks materials.
- Billboards. There is a lack of planning and usage of billboards to attract visitors to Tyrrell County offerings.
- Difficult to attract tourists onto Main Street due to neglected, abandoned, visual look of Highway 64.
- Lack of targeted marketing aimed at area strengths that already exist. Focused marketing to attract naturalists, bird-watching groups, and tourists seeking a quiet vacation or change-of-pace day trip from their Outer Banks vacation is minimal. This includes little cooperative marketing with Outer Banks Visitor Centers and vendors to create and highlight inland day trips.
- Website domain name (www.visittyrrellcounty.com) is long, cumbersome, and not highly memorable.

W7. Lack of Communication and Clarity Between USFWS and Locals

Many residents indicated a lack of clear communication between the USFWS and local community members. In the early stages of the Red Wolf Reintroduction Program, the USFWS distributed misinformation (due to lack of knowledge), and more recently, its information has been unclear or unavailable. From this, Tyrrell and Hyde County residents have a continued lack of trust, and an unwillingness to “begin anew.” Many residents are stuck in a loop by continuing to point out USFWS miss-steps long past, rather than focusing on the Service’s present potential to cooperate. Additionally, both parties have a lack of clarity regarding opportunities for economic partnerships on USFWS refuge lands.

W8. Lack of Tourist Amenities

Lodging is minimal in Tyrrell and Hyde Counties, and no camping is available for naturalists. Dining, shopping and services are low in number, and these support mostly residents. Although new ideas are beginning to excite local residents, and some new efforts are now in process, much more will be needed before the area can sustain steady or growing tourist activity.

W9. Lack of Capital Funding for Private Venture Start-Up

Tyrrell and Hyde Counties are among the poorest of North Carolina counties, and access to capital is not easily available to assist start-up entrepreneurs.

W10. Attitude of Waiting for Outside Help and Funding

Residents indicated that they look toward government or other agencies for funding, information and general assistance in starting or running new tourism businesses. This reluctance to move forward with new ventures translates into late starts and a greater potential of giving up local control to outside vendors and operators.

W11. Limited Focus of Tyrrell County Chamber of Commerce

Tyrrell County residents feel that their Chamber of Commerce represents downtown Columbia businesses more actively than it represents county businesses and their concerns.

W12. Governmental Use of Downtown Columbia Office Space

Much of Columbia's downtown, waterfront, and "tourist zone" property is occupied by government buildings, which detracts from and limits development of this valuable and potentially attractive waterfront area.

W13. Lack of Cooperation and Integration Between Black and White Communities

Several residents reported community separation between the "black and white communities", especially regarding programs for youth, and cultural activities. Also, several respondents mentioned that the focus of the TCCDC is of only one economic sector of the community. This was seen as a problem as the TCCDC was originally created to assist development for all sectors but has in practice focused primarily on low-income black community needs – though it was noted that TCCDC has the capacity and willingness to provide general training for business entrepreneurs and for anyone requesting their assistance.

OPPORTUNITIES

O1. Outer Banks Tourism

The Outer Banks region, only 35 to 50 miles away from inland Tyrrell and Hyde Counties, attracts 200,000 visitors per week between Memorial Day and Labor Day. These visitors are coming for its natural beauty and activities, and can be tapped for inland ecotourism experiences.

O2. Red Wolf Center

Various studies, including this one, and examples of existing similar facilities, show that a Red Wolf Center alone would provide a major "destination", premier attraction to Tyrrell and Hyde Counties. Funding for and construction of a high-quality center could provide the cornerstone for tourism expansion and economic development in the area.

Risks are lack of vision of the Center’s potential; lack of funding; and lack of clarity about: the relationship and benefit distribution between the Red Wolf Coalition, USFWS, and other partners, and ownership of, and revenue from, building, land, and its concessions.

O3. Public Funding Provided Via Government Agencies

Tyrrell (and Hyde) County is a “target” county for public funding due to its rural status, low median incomes, and economic changes in past decades. Partnership for the Sounds, the Ecotourism Steering Committee and the TCCDC, among others, have applied for and received various grants due to this status.

O4. Outside Developers and Investors

Experienced individuals and organizations can provide knowledge, funding and resources for creating economic prosperity and environmental improvements in Tyrrell and Hyde Counties. Ideally, these organizations will partner with locals for business ventures; will hire locally; and work within, as well as promote, local developmental zoning and tourism guidelines, thereby providing maximum benefits to county residents.

THREATS

T1. Outlying Landing Field (OLF)

This military OLF is still an ongoing discussion and active land deal for the Washington/Tyrrell/Hyde/Beaufort County area. It is very much a threat to native wildlife and its natural habitats, as well as an extreme threat to the economic prosperity and future potential of wild game hunting and nature-based tourism in this four county area.

T2. Changes In Primary Local Industries

- Farming as an industry is moving away from smaller farms (50 acres) to larger, mechanized farms (5000 acres); locals say that now it is harder for individual farmers to make a living; profit & expense margins are harder to control; and that large commercial operations (such as Black Gold Potatoes) are buying out local, family operations.
- Fishing industry is undergoing regulatory changes regarding fishing rights, use of waterways, and catch limits, etc. Fishers have the same problem with producing substantial profit margins. Crabbing is still viable in the immediate area, but commercial fishing is not attracting the younger generation.

T3. Outside Developers and Investors

Individuals, companies, and organizations from other states and localities are beginning to migrate to the “Inner Banks” area and buy land for both investment and development.

Because of their ready access to capital and their visions for growth, these outside investors can quickly drive future development, as well as the look and feel of Tyrrell and Hyde Counties, if residents do not participate actively and decisively in the growth of their communities.

T4. Current Legislation Regarding Tax Credits

Current tax legislation supports large businesses but not smaller ventures. Also, according to the TCCDC, many funding organizations require 85 percent of an applicant's budget to come from within the applicant's county, which is difficult for these poor counties that have had to look elsewhere for financial support.

T5. Hurricanes

This coastal area is potentially in the path of hurricanes each year. The effects from Hurricane Isabel (September 2003) are still being processed more than one year later by local landowners, businesses, farmers and fishermen.

"Biggest threat to environment is average people like you & me wanting to build houses on the river or second homes in the mountains." Interviewee 44

"Once OLF becomes operational, swans and waterfowl will fly right over and leave. [I] think they already have permission for Military Operational Airspace to fly over the whole 5-county area at any ceiling. If OLF comes in, tourism here may be short-lived." Interviewee 20

WHAT DOES THIS MEAN FOR RED WOLF ECOTOURISM?

Tyrrell and Hyde Counties have in place some of the strongest components for successful ecotourism. The presence of the red wolf, the beauty and abundant natural attractions, a plethora of descriptive data from various studies, the existence of local planning boards and organizations, and the leveragability of one of the country's most visited tourist areas, all bode well for phenomenal success.

Even though there are many assets in Tyrrell and Hyde Counties, there is no premier attraction that brings visitors to the area. The Red Wolf Center can become that keystone. A coordinated effort between residents, officials, existing tourism operators and funders is needed, with specific emphasis now being placed on implementation of strategic businesses that make it possible to capture the tourist market. Organizations will need to turn their attention to alleviating weaknesses and taking advantage of opportunities listed herein.

Threats can be monitored and planned for, but not necessarily controlled, while opportunities can be capitalized upon. Outside developers are both an opportunity and threat, depending upon internal plans and controls that are put in place during early stages. Partnerships can be mutually beneficial when the visions from local residents and outside developers match. A "wait-and-see" attitude toward development relinquishes local control, and can produce results that benefit outsiders who have less at stake than community residents.

TOURIST RESULTS

Tourists were surveyed at four locations: the Outer Banks Visitor Center in Manteo (89), the Aycock Brown Visitor Center in Kitty Hawk (33), the Columbia Visitor Center (40), and the NC Aquarium on Roanoke Island (40).

TABLE 3. Numbers Of Tourists Surveyed At Each Location

Date, 2004	# Surveyed	Location	# Tourists that day inside the Center
Thurs. 6/10	29	Manteo	180
Fri. 6/11	33	Kitty Hawk	202
Sat. 6/12	40	Columbia	392 (*550 cars in lot)
Sun. 6/13	60	Manteo	553
Tues. 6/15	40	Aquarium	2100
Total	202		3427

*Note: Visitor Center staff calculates 2.7 people per car. So, 550 cars = 1485 people coming through that day (6/12).

1. TOURIST DEMOGRAPHICS

Summary information on the 202 people interviewed in June 2004 were:

- From 11 to 83 years old
- 54% female, 46% male
- From 26 states and 4 countries (including USA)
- 54% with income less than \$75,000
- 81% traveling w/family
- Average group size was 4.7 persons
- 100% had car on this trip

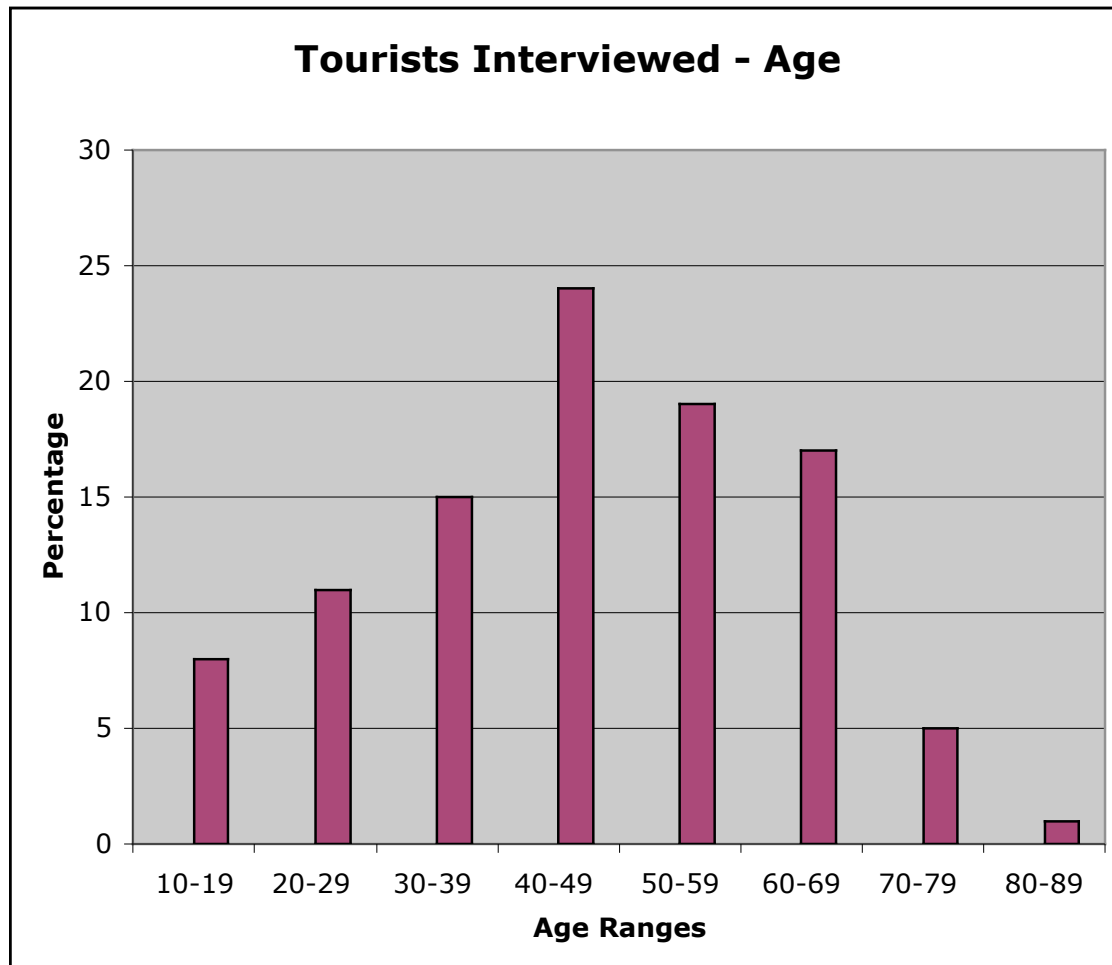
Age, Income, Education, Household and Group Composition:

Most (81%) people traveled with their family, while a few (17%) traveled with friends. Only a couple (1%) of people each were traveling with an educational or religious group, or were traveling alone.

Group size ranged from 1 to 19 persons. Over one-third (37%) were traveling in pairs; one third (32%) had 3 to 4 people in their group; 19% had 5 to 9 people; and 11% had 10 or more people in their group. Only 1% of interviewees were traveling alone.

Age ranged from 11 years to 83 years old, with the highest percentage of travelers interviewed in the 40 to 49 year category (24%). Age 50+ years was represented by 42% of tourists interviewed, while 34% made up 39 years of age and younger. Youth made up 8% of the study sample (Table 4).

TABLE 4. Percentage of Ages of Tourists Interviewed
(N = 201)



Over two-thirds (69%) of tourists interviewed responded that they were “not single”, with 31% saying they were.

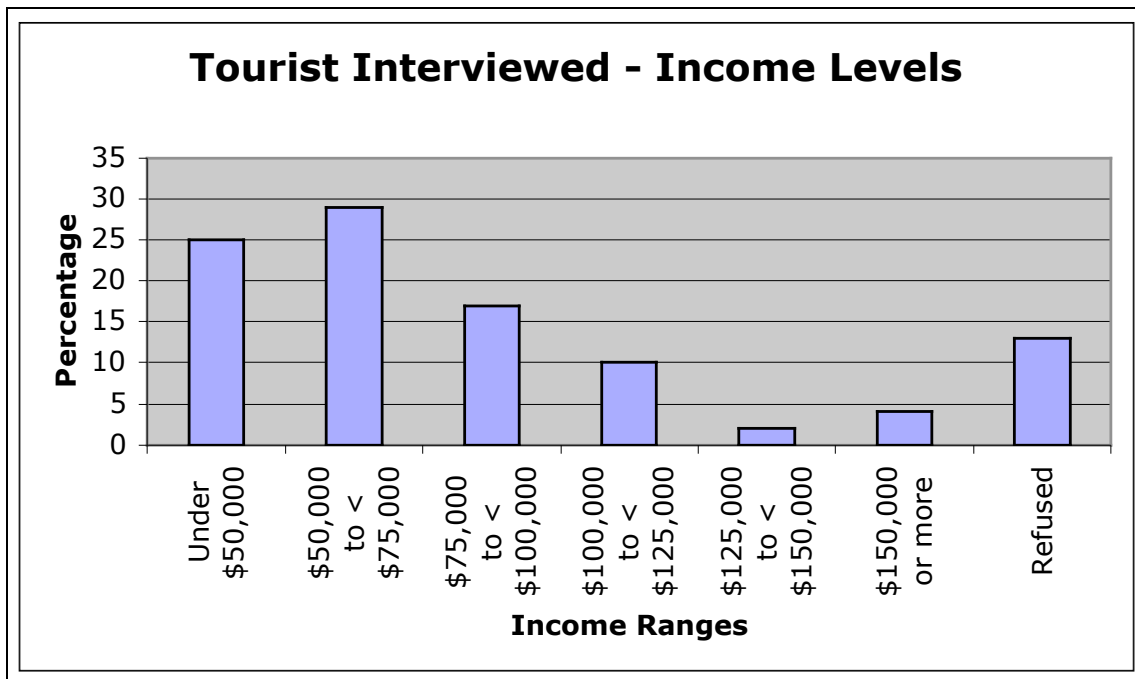
Results on the number of adults per household were: 71% of interviewees lived with two adults in their house; 13% had one adult, 11% had 3 adults, and 5% had 4 or more adults.

Households with children made up 39% of the study sample: 18% with one child, 15% with two children, and 6% with three or more children living in their household.

Education levels of 95% respondents were evenly distributed between High school, Some college, College graduate, and Post-graduate, with each level receiving 20-26% of the sample. All 5% who reported an education level of less than high school were youth under 16 years of age.

Income of respondents was scored at 54% under \$75,000 (Table 5). We could also interpret the sample’s income as two-thirds (62%) with incomes at \$50,000 and above.

TABLE 5. Percentage Income Levels of Tourists Interviewed
(N = 202)



One quarter (25%) of the sample scored an income less than \$50,000, and over a quarter (27%) of respondents listed incomes between \$75,000 and less than \$125,000. Only 6% of respondents listed their income as \$125,000 or more. The (maximum) average income of the sample surveyed was just under \$84,000. Income was a sensitive subject for 13% of respondents, who refused to answer this question.

WHAT DOES THIS MEAN FOR RED WOLF ECOTOURISM?

Red wolf and wildlife ecotourism aimed at couples and families, supporting groups up to 10 persons, with moderate activity levels for middle aged tourists, and separate youth components, would capture the largest percentage of summertime Outer Banks tourists. These tourists are well educated, and have adequate incomes to participate in moderately priced outdoor activities.

Travel & Length of Stay

Tourists (98%) came from 26 states in the United States, and 2% from three other countries – Australia, England, and Italy. North Carolina had the most interviewees at 34%, Virginia at 12%, Pennsylvania at 10%, Tennessee at 6%, and Florida at 5%. Over 70% of interviewees were from states in the Eastern Time Zone.

Most (80%) of the people were interviewed at Outer Banks locations. Of the 20% who were interviewed in Columbia, NC, 73% were on their way to the Outer Banks, and 25% were coming back from the Outer Banks and 2% did not answer that question.

Only 6% of visitors interviewed were staying overnight in Columbia, NC. Of those 12 people responding, 1 was a resident of Columbia, 3 were staying for a week, 4 were staying four to five nights, and 4 were staying one to two nights.

The number of nights visitors stayed on the Outer Banks varied from day trips only (11%) to three months; with one-third (34%) staying one week, 20% staying 4 to 5 nights, over one-quarter (27%) staying 1 to 3 nights, and 4% staying 8 or more nights. Residents made up 4% of the study. The average length of stay for non-resident respondents was 5 nights. This corresponds to the Outer Banks Tourism Office's average visitor stay of 5 to 6 nights (*pers. comm.*, Outer Banks Tourism Director, April 2004).

Preferred Accommodations & Marketing

Visitors were asked to mark their preferred type of accommodations. A few people chose multiple answers, making the total greater than 100%. "Rental House" was chosen the most, probably because the Outer Banks is composed largely of rental house properties.

Rental House	36%
Small Hotel	19%
Other	16%
Bed and Breakfast	13%
Large Hotel	13%
Cabin	11%
Inn	9%
Other = Camp (7%), unspecified (3%), timeshare (2%), RV (1.5%), condo (0.5%), resort 0.5%), own house or family (1%)	

Marketing channels that visitor had used or were aware for the Outer Banks was scored. Most (68%) of visitors interviewed said that they knew of the Outer Banks through friends and family. The Internet was the next most common marketing channel, with 57% of the visitors interviewed. Travel Guide books were also picked by over half (52%) of the respondents. Over one-third chose (38%) chose Tourism magazines & brochures, while Magazine, Newspaper, and TV advertisements all were picked by 12 – 15% of respondents. Other sources (not identified) were chosen by 12% of interviewees.

WHAT DOES THIS MEAN FOR RED WOLF ECOTOURISM?

Over two-thirds of the Outer Banks tourists interviewed were from the Eastern US states – native states of the original wild red wolf – and had 4 to 7 days or more for this vacation. Red wolf ecotourism activities would want to market in these eastern states, using the Internet, as well as guidebooks and tourism magazines. Red wolf tourism in Tyrrell and Hyde can best capitalize on the one-day packages, as many people are renting houses at the Outer Banks, and therefore do not need an inland place to stay, but do have time for these activities. However, small hotels, camping, and bed and breakfast inns can be developed in Tyrrell and Hyde to capture those tourists on short stays.

2. RED WOLF KNOWLEDGE

Visitors were asked about their knowledge of the red wolf and its recovery program. Over half (58%) of tourists surveyed knew red wolves are an endangered species, and one-third (33%) knew that red wolves are located 35 miles inland from the Outer Banks – many because they had seen the Highway signs saying “Red Wolf Next 7 Miles.”

Only one-third (32%) knew about the USFWS red wolf reintroduction project. As for ways to experience the red wolf, only 14% knew there are trips to hear the wolves howl, of which 1% had been on a howling trip. Note: this survey was administered prior to the howling trips beginning for the summer, therefore the 1% of people who answered this question “yes” had to have been there in a previous year. Many tourists did say that they wished the howling trips began earlier in the year – just after Memorial Day – so that they could have participated.

WHAT DOES THIS MEAN FOR RED WOLF ECOTOURISM?

The Red Wolf Recovery Program, and the fact that red wolves exist in these nearby areas, needs to be better advertised to Outer Banks tourists – signs on the road are good, but clearly not enough. Howling trips can be started as early as Memorial Day, to add a couple of weeks onto the summer schedule. Clearly, these “Inner Banks” areas can be marketed as “Red wolf territory” as some such catchy phrase, to better notify visitors about the program and its potential activities.

3. RED WOLF CENTER

We asked people if they would like to visit the Red Wolf Center and described it as such:

“The Red Wolf Coalition is planning to build a Red Wolf Center, about one mile off of Hwy 64 at Columbia, NC – about 35 miles west of the Outer Banks. It will include information and displays on the red wolf recovery program, habitat, behavior patterns, food sources, and include short films, gift shop, interactive radio tracking, and most importantly, a live pair of red wolves (which could not be re-released into the wild) in a naturalistic exhibit.”

Results show 89% (179/202) of visitors interviewed are interested in visiting the Red Wolf Center. Tourists were then asked what would be the maximum amount of admission charge to the Red Wolf Center that they would be willing to pay. Results show \$7.60 as the average maximum amount people would pay. Sixty percent (107/179) said they would pay \$7 or less; the median price was \$6.00. The range of responses was from \$0 to \$45.

Only 14.5% (26) of people interviewed who said they would come to the Center (179), marked that they would pay less than \$5.00 admission. Therefore, 76% (153/202) of all visitors interviewed would both come to the Center and pay a \$5.00 admission charge.

This result of 76% of visitors willing to come and pay \$5.00 was used to calculate future revenue for the Red Wolf Center (Table 6). It is unrealistic to expect that all (100%) of

these respondents, who marked that they would like to visit the Red Wolf Center and pay \$5, would actually come visit it at some future date after it is built. However, we can use these respondents as indicative of future visitors and their choices, and make several, more conservative estimates. We chose three calculation variables to compute ranges of revenue generated potentially by the Center, from its admission charges and then with additions of food and gift sales.

TABLE 6. Calculation Of Red Wolf Center Potential Future Revenue

Row	Formula	X = 33%	X = 10%	X = 5%	X = 2%
A	Visitors coming to the Outer Banks in summer	200,000 per week	200,000 per week	200,000 per week	200,000 per week
B	76% of visitors want to visit the Red Wolf Center	152,000 per week	152,000 per week	152,000 per week	152,000 per week
C	X percentage of Row B visitors who actually come	50,160 per week	15,200 per week	7,600 per week	3,040 per week
D	At \$5.00 admission charge, weekly revenue is	\$250,800 per week	\$76,000 per week	\$38,000 per week	\$15,200 per week
E	Number of visitors over a 12-week summer	601,920	182,400	91,200	36,480
F	Admissions revenue over a 12-week summer	\$3,009,600	\$912,000	\$456,000	\$182,400

In this study (see Table 9), 37% of respondents chose to include visiting the Red Wolf Center in their custom, packaged day trip – so we have included a column that uses 33% as the calculation variable, a slightly lower figure. Rosen (1996), in his study, used a variable of 10% to calculate the numbers that would actually visit, of those surveyed; therefore we have included 10% as one calculation column. This 10% is a percentage that we believe to be a reasonable figure with which to estimate the potential future revenue of the Red Wolf Center. We have also included even more conservative estimates of 5% and 2% to give additional ranges of revenue for policy makers to consider.

If we add on a food and gift per capita of only \$1 per person, then revenue increases by Row E dollars. For example, at 10%, an additional \$182,400 can be collected over the 12-week period, bringing the income to over \$1 million to the Red Wolf Center for the summer.

WHAT DOES THIS MEAN FOR RED WOLF ECOTOURISM?

A Red Wolf Center would be a tremendous asset for Tyrrell and surrounding counties. When marketed well, it could become the cornerstone for ecotourism in the area, drawing tourists not only from the Outer Banks, but also from the national market. Even if it began with a small percentage of visitors and admissions revenue, it could be packaged and linked to other ecotourism activities that would benefit local businesses, and allow the Center and local attractions to grow in popularity with Outer Banks visitors.

4. FEATURES IMPORTANT TO VISITORS

Tourists were given a list of features and services to rate their importance on a scale of 1 (least important) to 5 (most important). Average scores are presented in Table 7.

TABLE 7. Features Least/Most Important to Tourists

Features (Least/Most) Important to Tourists	Average Score 1 = Least; 5 = Most
1. A clean, safe environment	4.56
2. Enjoying unspoiled nature	4.35
3. Enjoying the beach	4.3
4. Relaxing in a peaceful rural setting	4.28
5. National parks or protected areas	4.19
6. Quaint, small-town setting	4.05
7. Visiting historical sites and landmarks	4.01
8. Environmentally-sound tourism operations	3.9
9. Easy directional and business signage	3.89
10. Wildlife viewing & bird watching	3.85
11. Learning more about nature	3.8
12. Attractive, landscaped streets & buildings	3.74
13. Casual walking	3.67
14. Learning about local Indian cultures	3.39
15. Local artisans and crafts	3.38
16. Water activities such as paddling	3.17
17. Physically challenging activities	2.88
18. Shopping at malls or outlets	2.25
19. Bustling nightlife	2.09

Most important to visitors were the items that averaged a score of 4 or higher. These are: a clean, safe environment; enjoying unspoiled nature; enjoying the beach; relaxing in a peaceful rural setting; national parks & protected areas; a quaint, small-town setting; and visiting historical sites and landmarks.

Also important (average ranking in the 3s, shown in the shaded area) were: environmentally-sound tourism operations; easy directional business signage; wildlife viewing and bird watching; learning more about nature; attractive, landscaped streets & buildings; casual walking; learning about local Indian cultures; local artisans and crafts; and water activities such as paddling.

Least important (average ranking in 2s) were: shopping at malls or outlets; physically challenging activities; and bustling nightlife.

WHAT DOES THIS MEAN FOR RED WOLF ECOTOURISM?

The features and services that tourists are looking for: safety, nature, relaxing, small-town, wildlife, etc., are perfectly aligned with what Tyrrell and Hyde County community members are wanting to offer and see developed.

5. PREFERRED ACTIVITIES & DAY TRIPS

Tourists surveyed were given a list of activities and asked to rank each on a scale of one to five, according to if they were least likely (1), or most likely (5) to participate in it. The results are presented in Table 8 below. All activities on this list are ones told to us by community members in their interviews, and most are based on the natural resources and culture of the area.

TABLE 8. Activities Tourists are Least/Most Likely to Participate In

Activities Tourists are (Least/Most) Likely to Participate In	Average Score 1 = Least; 5 = Most
1. Trail walking to view plants and wildlife	3.94
2. Viewing a wild bear	3.89
3. Visiting the Red Wolf Center with captive red wolves	3.82
4. Red wolf howling tour	3.71
5. River cruise	3.68
6. Viewing thousands of swans on a lake	3.6
7. Visiting the Waterfowl Museum	3.38
8. Learning about Indian history and artifacts	3.36
9. Looking for signs of a red wolf in the wild, like their tracks or scat	3.27
10. Bird watching	3.26
11. Photographing wildlife from a blind	3.24
12. Kayaking or canoeing on a river	3.05
13. Visiting a Farmer's Market	3.03
14. Walking a corn maze	2.94
15. Crabbing	2.94
16. Learning about the seafood industry	2.75
17. Hay ride	2.62
18. Farm tour on growing corn or potatoes, with homemade pies & jams	2.6
19. Hunting deer, quail or waterfowl	2.14
20. Skateboard park/ Recreational center	1.92
21. Hunting a bear	1.83

Tourists were most likely to participate activities which scored 3 or above. These included, in order of most preferred, trail walking, viewing a wild bear, visiting the Red Wolf Center, a red wolf howling tour, river cruise, viewing thousands of swans, visiting the Waterfowl Museum, learning about Indian history and artifacts, looking for signs of red wolf, bird watching, photographing wildlife from a blind, kayaking or canoeing, and visiting a Farmer's Market.

Likely to participate in activities scored between 2.14 and 2.94. These included: walking a corn maze, crabbing, learning about the seafood industry, hay ride, farm tour, and hunting deer, quail or waterfowl.

Least likely to participate in activities scored less than 2.0. These were skateboard park/recreational center, and hunting a bear.

Tourists were then asked to package 3 or 4 of these activities together into a day trip, located 35 miles west of the Outer Banks. Results can be seen in Table 9. Half of the respondents were asked to price their day trip, by indicating the maximum amount they would be willing to pay for this trip. The average amount that visitors are willing to pay for a day tour is \$40, with ranges from \$0 to \$300, depending on the activities chosen. The other half were asked to price each tour item they chose, with maximum amount they were willing to pay. The average prices they were willing to pay for each activity are listed below.

TABLE 9. Day Trip Activities

<u>Day Trip Activity</u>	<u>% Chosen by all</u>	<u>Average Price</u>	<u>Price Range</u>
1. River cruise	52	\$18	\$5 - \$60
2. Trail walking to view plants and wildlife	43	\$5	\$0 - \$25
3. Visiting the Red Wolf Center with captive red wolves	37	\$9	\$2 - \$28
4. Crabbing	27	\$21	\$3 - \$70
5. Red wolf howling	26	\$8	\$0 - \$20
6. Kayaking or canoeing on a river	26	\$21	\$0 - \$60
7. Viewing a wild bear	25	\$9	\$0 - \$30
8. Viewing thousands of swans on a lake	22	\$5	\$0 - \$15
9. Learning about Indian history and artifacts	20	\$8	\$2 - \$20
10. Looking for signs of a red wolf in the wild, like their tracks or scat	19	\$10	\$4 - \$25
11. Bird watching	17	\$6	\$0 - \$20
12. Photographing wildlife from a blind	15	\$11	\$0 - \$25
13. Visiting the Waterfowl Museum	13	\$6	\$1 - \$10
14. Visiting a Farmer's Market	12	\$6	\$0 - \$20
15. Walking a corn maze	9	\$7	\$0 - \$15
16. Hunting deer, quail or waterfowl	9	\$75	\$5 - \$200
17. Learning about the seafood industry	6	\$8	\$3 - \$15
18. Farm tour on growing corn or potatoes, with homemade pies & jams	6	\$3	\$0 - \$5
19. Skate board park/ Recreational center	5	\$16	\$0 - \$30
20. Hay ride	4	\$5	\$4 - \$5
21. Hunting a bear	3	\$600	\$200 - \$1000

The average maximum price that tourists are willing to pay for each activity, with its range of prices, is listed on Table 9. The most popular activity, chosen by over half of the respondents, was a river cruise (52%). Other activities that were picked by over one-third of the sample were trail walking to view plants and wildlife (43%), and visiting the Red Wolf Center with captive red wolves (37%). Other activities chosen by over 20% of the sample are: crabbing, red wolf howling, kayaking or canoeing, viewing a wild bear, and viewing thousands of swans on a lake.

The shaded area represents items chosen by over 10% and under 20% of the tourists surveyed: learning about Indian history and artifacts, looking for signs of red wolf, bird watching, photographing wildlife from a hunting blind, visiting the Waterfowl Museum, and visiting a Farmer's Market.

Items selected by less than 10% of the sample include: walking a corn maze, hunting deer or quail, learning about the seafood industry, farm tour, skate board park & recreational center, hay ride, and hunting a bear.

Visitors were asked, "How many of these day-trip packages would you take on this vacation?"

- 10% said none
- 72% said 1-2 tours
- 16% said 3-4 tours
- 2% said 5 or more tours

Then visitors were asked, "How many would you take on future vacation?"

- 3% said none
- 72% said 1-2 tours
- 19% said 3-4 tours
- 6% said 5 or more tours

These data show that 90% of visitors surveyed would take one or more day trip packages on their current vacation (if the packages were available), and that 97% would take one or more packages on a future vacation. Visitors are indeed "hungry for day trips" (Interviewee 8).

WHAT DOES THIS MEAN FOR RED WOLF ECOTOURISM?

Visiting the Red Wolf Center, going on a red wolf howling tour, and looking for signs of a red wolf, all scored as top activities that tourists interviewed would like to do. Others in this "most likely" category correspond with those activities that landowners can offer – viewing swans, bears, hiking on trails, photographing wildlife, kayaking, river cruise, and Waterfowl Museum. Residents who provide hunting on waterfowl impoundments are already set up to market these activities, and others are considering these options.

Choices of day trip activities varied, but red wolf tour options (Center, howling, signs) were chosen by one-fifth to over one-third of tourists surveyed. Additional activities chosen most were: river cruise, trail walking, crabbing, kayaking, viewing a bear, viewing swans, and learning about Indian history/artifacts. All of these activities could easily be partnered with red wolf tours, and all are activities, except perhaps the river cruise, that could be developed without much start-up capital. Visitors are willing to pay, on average, between \$7 and \$10 for each red wolf activity. Most importantly, 90% of visitors scored that they wanted to take a day trip on this vacation, and 97% said they would take one or more day trips on future vacations to this area. Indeed, red wolf and wildlife tours are poised to capture the willing Outer Banks tourist market.

6. RETURN TRIP INFORMATION

Tourists were asked if they would return to Northeastern North Carolina (NENC) in the next five years – 92% scored “Yes”.

When asked if they would be willing to stay in Columbia on their next trip, and make day trips to the Outer Banks, 49% scored “Yes”.

This is very important to the future development of tourism in Tyrrell County. If almost half of visitors chose to stay in these inland areas, they would require numerous hotels, restaurants, amenities and services to support such an influx of visitors.

WHAT DOES THIS MEAN FOR RED WOLF ECOTOURISM?

Red wolf tourism, based on Outer Banks clientele, has several advantages. First, Outer Banks tourism has a weekly turnover rate, as the average stay of these visitors is 5 to 6 nights. Second, these visitors do return – almost all of those surveyed said they would come back within five years. Therefore the repeat business is high, but not so often as to make existing activities boring and passé. This indicates that these visitors will repeat red wolf activities and day trips to Tyrrell and Hyde, if they had a great experience the first time.

Also, important is this study’s finding that almost half of tourists surveyed indicated that they would be willing to stay in the Columbia area – associated with where these day trips are – for their vacation, rather than at the Outer Banks. This result offers a great potential for Tyrrell and Hyde Counties to develop appropriate accommodations and related tourism services to provide for these clients. It must be stressed, however, that both attractive, appropriately-quiet, accommodations and quality day trips have to be in place – and we would venture to add the Red Wolf Center, as well – before Tyrrell/Hyde can truly capture Outer Banks overnight visitors. Caution is also called for, in that too much development would negatively impact on those qualities and activities that these visitors are seeking in the first place, and on the preferred lifestyle of local communities.

COMMUNITY PUBLIC FORUM

The community was given the opportunity to hear and comment on the results of the study at the public presentation on Thursday, 12 August 2004, in Columbia, NC. Attendees came forth with the following questions and comments:

QUESTIONS:

1. Red wolves were put out into the wild in 1987 – there are about 100 red wolves around here? Red wolves run in packs? How many pups born in a litter?
2. I like the importance placed on family activities. As a long-term Outer Banks resident, I've seen so many family activities torn down for housing.
3. Did you separate the tourism data by state, to see if NC residents want different things than other visitors?
4. I'm very interested in the comment about USFWS lack of communication. Was this from a large group of people? What types of comments?
5. There is significant revenue information here. Money is necessary to construct a facility. In the community, is there a lack of understanding of the project? Apathy? Unaware? And where is the money coming from to build it?
6. What are the operating costs to maintain a Red Wolf Center?
7. Was the community concerned of danger from red wolves? Is there a danger for tourists on these trips? Are tourists themselves afraid?
8. Are there concerns from local residents about the Red Wolf Center? Sounds? Smells? Wolves getting out of a captive facility?
9. What is your market from Outer Banks tourists – just the southern end come here & northern end not come? How predict? Any sense in this county that there is a strong segment of visitors who love wildlife? What portion of that market [wildlife lovers] are Outer Banks tourists?
10. Do you have data of tourists who would come, based on driving distance?
11. What are the insurance needs for a tour operator?
12. What agency will take charge of building a red wolf viewing area?

WHAT DOES THIS MEAN FOR RED WOLF ECOTOURISM?

Residents want more facts about the red wolf, and most feel that USFWS has not effectively communicated that information. Community members were interested, to excited, about a Red Wolf Center – none expressed a concern about wolves getting out of a captive facility or smells, as wolves live among them already. A few residents expressed concern about wolves as dangerous, but no tourists interviewed were concerned. This Center would not draw its construction or operating budget from the local community (as these counties are in no position to afford to finance one) – the Red Wolf Coalition plans to seek funding from organizations, donors, and outside funders, with visitors bringing in sufficient revenue to cover operating costs. These visitor data have not been analyzed by region, but were drawn from both the north and south side of the Outer Banks. These tourist data can be interpreted further, outside of this report.

COMMENTS:

1. Clean up the ditches along the roadsides in Columbia, to look better and to prevent mosquito breeding.
2. Use landscape architecture students from Raleigh to come and do beautification studies and drawings of Columbia and Highway 64. This would give examples to residents and government officials, and more options to choose from.
3. I realize this may be out of the scope of your study, but did you look at the red-cockaded woodpecker and what sort of draw it might have for tourists, particularly birders? Birders will travel a long way to add a bird to their list. This spring a couple from Montana contacted us about visiting Palmetto Peartree Preserve (P3). They had planned to stay on the Outer Banks but ended up changing their plans and spending a couple of nights at the Brickhouse Inn. Any suggestions how we/Tyrrell Co. might better capitalize on the Red-cockaded woodpecker? We're planning to open the preserve to the public once the signage is complete and after this year's hunting season (approx. March). One of our Red-cockaded woodpecker biologists is interested in giving Red-cockaded woodpecker tours and possibly partnering with the B&B operators for an established client base.
4. In your talk you mentioned how local residents are concerned about a loss of tax base. I know this continues to be a concern for residents and particularly the local government officials. We addressed this issue early in the Palmetto Peartree Preserve project. Since the start of the project we have paid property taxes for the lands that make up Palmetto Peartree Preserve. We will continue to do so as long as TCF owns the property.
5. Pettigrew State Park has started expanding to the Scuppernong River and will be building facilities there in the next 10 years. This should help the ecotourism.
6. Great job!

After hearing these comments and questions, we realized that the workshops on Nature/AgriTourism (August 14, 2004) and Entrepreneurship Training (October 2004) were to be very useful for residents seeking to get involved in tourism.

Additionally, USFWS information on red wolves and its recovery program needs to reach both the local public and outside visitors. To that end, informational kiosks on red wolves are planned at key locations in Columbia, Alligator River National Wildlife Refuge and on the Outer Banks. In this manner, tourists can receive new, accurate information on the wolves, and learn more about the Recovery Program.

WHAT DOES THIS MEAN FOR RED WOLF ECOTOURISM?

Clearly, there are opportunities for protected areas, such as P3 and Pettigrew, to partner with the Red Wolf Center and other tourism ventures, to capitalize on the incoming Outer Banks tourist. Community training and tourism marketing are keys to success in Tyrrell and Hyde Counties.

DISCUSSION

“I would like tourism to grow, especially sightseeing, but I don’t want to destroy the unique area and habitat that we possess, just for money. We’re not going to be able to prevent change.” Interviewee 20

This beautiful “Inner Banks” region has assets, such as the red wolf, that few areas can claim. The red wolf, like other wolves, has the potential to become a popular and viable tourist attraction (Brandt 1993). The extensive public and privately protected lands offer abundant natural beauty and serenity for hobbyists and naturalists. Numerous waterways provide both high action and meditative activities for all ages. This study’s tourist results show that these types of attractions – river cruises, viewing bears, trail walking, kayaking, visiting the Red Wolf Center – are exactly what many tourists seek.

Residents of Tyrrell and Hyde Counties express a love for and understanding of their community that provides a good foundation for a thriving and profitable community-based ecotourism industry. Their appreciation for natural resources is high, and their desire to preserve their way of life and rural beauty is strong. At the same time, many residents rarely recognized, upon initial reflection, that Outer Banks tourists could be attracted to these local attributes, and lacked the understanding of how to begin to capitalize on this tourism market. Their area has an opportunity to become a major destination, based on the draw of the red wolf and other wildlife; and the key to attaining this goal is immediate planning and timely execution, as development driven by outside interests, with possible differing goals, is fast approaching.

Tourists are very keen to learn about and see red wolves, while also experiencing typical nature-based activities like hiking, biking, boating and bird watching. Farm tours and corn mazes, although not scored highly by most respondents, still can attract a solid percentage of those visitors wanting to be educated and entertained in rural surroundings. Overall, tourists surveyed indicate they want what Tyrrell and Hyde County residents say they can provide.

Opportunities to capture visitors based on the red wolf can be expanded. Howling trips, although popular, are little known, and visitors surveyed in early June expressed the desire to have these tours begin on Memorial Day weekend in May. Study data show that only one-third of visitors know about the USFWS red wolf reintroduction program, or that red wolves are located nearby. Road signs signaling “Red Wolf Crossing Next 7 Miles” are good, but increased communication and additional methods are needed by USFWS, and Tyrrell/Hyde County marketing agencies, to expand this knowledge to both local residents and potential visitors.

Conversely, almost 90% of visitors surveyed scored that they were interested in visiting the Red Wolf Center at Columbia, when built. Our data calculated that 76% of tourists surveyed were willing to both visit the Center, and pay \$5.00 in an admission charge. Using a figure of 10% of this 76% as actual attendance (7.6%), the Center could predict 15,200 visitors per week, and a weekly income of \$76,000, for a total of \$912,000 in

summer revenue. Adding in gift and food receipts could bring this total to over \$1 million. Even with a worst-case scenario of the Center drawing only 2% of willing visitors, revenue generated becomes \$200,000 – most likely enough to pay for estimated annual operations at the start. However, we must caution that, in order to achieve any of these attendance numbers, the Red Wolf Center must be a multi-faceted, high-quality, educational attraction, that is easily accessible, packaged with other day-trip activities, and marketed heavily with these Outer Banks tourists (Epler Wood 2002).

A previous study of households in the southeastern USA by Cornell University (Rosen 1996) found that 71% of respondents reported an interest in visiting a red wolf region, and 71% to 79% were interested in viewing a live red wolf, in various settings (Rosen 1996). Rosen also found that 60% of respondents were willing to pay at least \$5.00 for wolf recovery. Additionally, Rosen found that the economic impact of a wolf education center could generate millions to the multi-state region in annual tourist revenues. Our project results exhibit these same ranges of Rosen's respondent interest and willingness to pay, and demonstrate that red wolf recovery, and a Red Wolf Center, can be a lucrative venture for this NENC region.

Local landowners have had mixed attitudes toward red wolf reintroduction and recovery. In 1995, Quintal surveyed resident attitudes toward, knowledge of, and support of the red wolf. She found that just over half (52%) of respondents said they supported red wolf reintroduction, while almost one-third (30%) said they opposed it. Hyde County residents expressed the highest level of opposition (49%) and lowest level of support (39%), while Dare County residents registered the lowest opposition (10%) and highest support (78%).

Almost ten years later, local attitudes toward red wolves of landowners in this study indicate that the early animosity has lessened considerably, even in Hyde County. Although most residents have realized no real benefits from red wolf populations, all those interviewed are ready and willing to have red wolves generate revenue for the area. Residents see red wolf ecotourism as potentially providing jobs that will benefit their families and community, and they want to give their children opportunities for good jobs close to home. Most residents view ecotourism as a clean and viable industry.

In 2004, much of the animosity remaining towards red wolf reintroduction stems from residents' attitudes towards government and its perceived interference in their daily lives. Examples stated include: farming and fishing regulations; DOT maintenance and highway construction; public lands not contributing to the tax base; and wildlife programs such as the Red Wolf Recovery Program and its one million dollar annual budget. These programs are perceived to affect their private property rights, sense of fiscal justice, and traditional values and practices such as hunting. Residents' wariness of local zoning laws also may stem from this belief in government's extraction of local rights.

Community members expressed strongly that more thorough communication between various agencies (governmental, social, or conservation) and residents is needed to boost

knowledge, promote clear understanding, and alleviate much of this local discontent. For example, many residents are not aware: that the Palmetto Peartree Preserve, although exempt, chooses to be a taxpayer; of the current status of red wolf/coyote hybridization, red wolf birth/death rates, and other program goals.

Hunting, although a big business in Tyrrell and Hyde Counties, has changed significantly over the last few years. Landowner/leasee relationships with hunters were mixed to negative, as hunters increasingly exhibited behaviors that brought harm or economic loss to landowner property. We were told by farmers and other landowners that many hunters in the Tyrrell and Hyde County region had gotten so disrespectful of the land that they leased for hunting, that many owners now refused to rent out land to these individuals or groups. On the other hand, the numbers of duck impoundments in Hyde County had escalated, due to popularity of duck/swan hunting and availability of government subsidy.

Alternative and/or complimentary sources of income based on these wild assets can become available. Over 90% of the tourists surveyed want to take a day-trip tour to the Tyrrell/Hyde County area, and participate in these wildlife and waterway activities. Local residents are just beginning to visualize ecotourism as a possible thriving industry in Tyrrell and Hyde Counties. Some residents are eager to become entrepreneurs and a few have given considerable thought and planning to these goals. Most, however, are busy in their current jobs, or have little knowledge of what is needed to go forward. Potential community-based entrepreneurs state they first need information on what types of tourism businesses are viable, and what to expect in the operation of these businesses, so that they can make logical choices as to what they can offer. They request information on numbers of tourists expected for various activities, pricing, seasonality, insurance, regulations, and job demands. In summary, they need real and practical information to decide what roles they want to take in the county's ecotourism growth.

This study provides some of those answers. For residents to take advantage of Outer Banks' visitation, they must target couples and families; support groups of ten people; create moderate-level activities, as well as more active youth components; provide safe, relaxing tours, in a rural, small-town atmosphere; offer interesting and educational information with their wildlife and farm activities; create day-trip packages with the Red Wolf Center and other local attractions; advertise primarily at Outer Banks rental houses, Visitor Centers, tourism magazines, and over the Internet; and target married, educated, 30 to 60-year old residents, who live in North Carolina and the U.S. Eastern seaboard states.

Importantly, almost all of tourists surveyed said that they will return to NENC in the next five years, and that almost half of them would be willing to stay in the Columbia area, near to these wildlife activities, and make day-trips to the Outer Banks. This offers Tyrrell and Hyde County community residents and development officials a great incentive to create these amenities and services now, and to collaborate with the Red Wolf Center and its marketing efforts as the cornerstone attraction of this area.

It must be noted that in most community-based ecotourism efforts, beginning projects and plans have an excitement and possibilities associated with them that can soon fade with time and execution. As community-based ecotourism becomes a reality, benefits may skew to a subset of the community, leaving other members wondering why they are supporting these efforts (Lash 2003). In the case of Tyrrell and Hyde Counties, Columbia will definitely become a focal point for tourists, particularly if the Red Wolf Center is located nearby, as it needs to be to achieve maximum revenue. Without some complimentary, key attraction, such as a Waterfowl Museum, and extensive cross-marketing, Hyde County residents could end up feeling and being marginalized. It is up to the two counties to work together to spread and package benefits, services, and attractions, in order to preserve long-standing relationships and maximize revenue to the entire “Inner Banks” region.

Community-based ecotourism, based on the red wolf and local wildlife, in Tyrrell and Hyde Counties has great potential. The next section details the strategies and specific next steps that emerged from this study.

STRATEGIES & NEXT-STEPS

“We need to have a high level meeting and decide if we’re going to plant corn or plant people.”
Interviewee 45

STRATEGIES

The Outer and “Inner” Banks of NC have a unique opportunity to capitalize on the reintroduction and recovery of the red wolf. This species can be a tremendous and immediate draw, as shown by this study, and by the actual tourist numbers visiting other U.S. protected areas featuring charismatic mega-vertebrates. All residents, including landowners, businesspeople, townspeople and officials alike, can benefit from the proven fact that a species of this type can bring major economic benefits into a region when there is a clear and well-managed effort.

In this case, the first strategic measure involves community input and agreement. Efforts must be consensual and democratic, as all groups within Tyrrell and Hyde Counties will be affected by and involved in how the red wolf is marketed, and how tourists affect their area. Landowners and farmers provide the immediate habitat of the wolf, and deal most directly with wolf behavior. Farmers and fishers join townspeople in facing changes in lifestyle and work, as ecotourism becomes a dominant industry. Officials of government and local organizations face decisions regarding fair governance and providing infrastructure for unprecedented growth. Youth will choose to remain in the area or not, based on decisions made today which affect their future. Finally, all residents will feel the impact of a tourist population that can swiftly outpace local presence. Communication and decision-making must encompass all these groups.

Second, a comprehensive plan for the type of tourism environment the counties seek to create is required. Ecotourism is ideally suited for this relaxed rural setting rich in wildlife and natural amenities; and fits perfectly with what Outer Banks tourists request, and what locals state they wish to provide. This type of tourism requires care and agreement, and the creation and adherence to a master plan protecting green space, wildlife, low density goals, low impact methods of building and growth, and high local involvement to ensure that the people with the most at stake are best able to protect what they value. Scattered, singular, short-term development decisions are easier and faster, but produce hodgepodge results which ignore overall appeal, potentially harm the environment – the area’s primary draw, and which benefit only the few. Homogenous, “big box” development provides convenience, but must be tempered with decisions regarding the unique, historical, small-town look and feel that both locals and tourists are wanting to see.

Tyrrell and Hyde Counties can take advantage of the proximity and high density of Outer Banks tourism by seeking to draw a small percentage of those tourists into their regions for a short and specialized stay. Travel choices are related to travel costs, and not only are these NENC destinations located closely to highly populated eastern U.S. areas, but

also these Tyrrell and Hyde County ecotourism activities are located just 35 to 50 miles away from this highly sought tourism destination, the Outer Banks. Cooperative marketing efforts aimed at those tourists already planning to come to Outer Banks will reap the highest immediate reward.

Finally, partnerships, between Outer Banks tour operators and residents of Tyrrell/Hyde Counties, can assist in getting viable businesses up and running, as well as direct income into local hands. Cooperative agreements with developers can assist these counties in paying for physical infrastructure needed for growth, in addition to providing attractions which draw desired tourist groups, and housing for residents.

NEXT-STEPS

The following recommendations were extracted from listening to what community members suggested, what the responding tourists scored as important, and from what researchers observed during the study, bearing in mind the strategy goals above.

1. BUILD THE RED WOLF CENTER

It is important that the Red Wolf Center be professionally and consistently designed, built, and marketed with the Outer Banks tourists, and nationwide. Based on our tourist study, as well as previous wolf center studies, it has great potential, not only to bring substantial revenue to its gates and its vendors, but also to the community members of these towns and counties as well.

Our study results from the tourist demand survey (see Tables 6, 8, and 9) are based on the Red Wolf Center being built within close proximity (one mile) of the main and well-traveled roadways of NC State Highway 64 or 94, near the town of Columbia.

Several locations have been considered, but none finalized as of the writing of this report. Ideally, the site would encompass a large track of woodlands, in order to bring the visitor into the wolf's natural habitat; be near a major highway, so that access is easy for the ad hoc visitor; be next to farmland or other rural, wild areas, so as to set the ambiance for the visit; have additional attractions within its borders or nearby, such as canoeing or kayaking capabilities, hiking trails, "sacred forests", etc.; be able to sustain large numbers of visitors, cars, buses, noise, and visitor amenities (displays, theater, food, gift, restrooms); and have frequent, attractive directional signage to the Center, with superb marketing to Outer Banks and Columbia visitors.

When built, this Center can be used as a cornerstone attraction to draw visitors from the Outer Banks to the Tyrrell and Hyde County areas. The community-based, day trip, and packaged attractions listed in this report need to become available to tourists on the same timeline as the opening of this Red Wolf Center.

2. CREATE A TOURISM PLAN FOR TYRRELL & HYDE COUNTIES

“Across the U.S., everywhere you go, on the highways they’re moving people out for the Food Lions and Lowes and Wal-Marts. They build these huge shopping centers on 40 acres and drive people out. I can’t say if it’s good or bad. It might be bad for the other little businesses but good for the consumer. There used to be six places in Columbia where you could buy shoes; now there’s not a shoe store.” Interviewee 48

In 2004, the town of Columbia had zoning laws, while Tyrrell and Hyde Counties did not. County zoning is imperative if the residents are to maintain control over countywide development, and not to sacrifice local ambiance to the whims and visions of tourists and outside developers. A comprehensive and cooperative tourism plan is needed, based upon the previous studies, which would detail zones of community-based ecotourism activity, farms, residential and commercial lands, and preserve those natural assets that draw visitors to this area.

We recognize that gaining countywide approval from residents for this type of long-range plan can be a time consuming and sometimes contentious process, but is critical for success in realizing the vision that both residents and town/county planners expressed.

Our conclusions on the need for detailed Tyrrell County & Hyde County ecotourism zoning are strikingly similar to those drawn by former studies such as: the Ecotourism in Tyrrell County Report (Anton, 1993), the Regional Strategy for Eco-Tourism Report (National Coastal Resources Research and Development Institute, 1995), the Nature-Based Tourism in the Coastal Sounds Area Study (Call 1995), Moving Toward the Future Together guide (Coastal Initiative Committee, 2000), and the Tyrrell County Tourism Destinations and Information catalog (The Conservation Fund, 2001).

There is great potential for balancing market-worthy ecotourism with the desired quality of life in this region, and prompt zoning is required to realize that potential.

3. EDUCATE AND ASSIST RESIDENTS IN TOURISM

“Educate the local people. I hate to see all the businesses get bought up by outsiders. It is part of growth, but show the local people how to get involved, so if they do sell out or not, they’ll be making the decision as an informed one.” Interviewee 33

Local residents need training and assistance to grow community-based ecotourism ventures. Residents requested training in both general business skills and in ecotourism functions specifically. They bring knowledge of their own region, outdoors skills, and of their own businesses, but need to convert this knowledge into viable ecotourism businesses.

Training such as the one-day Ecotourism Conference in August 2004, sponsored by TCF and the TCCDC, needs to be expanded and repeated. These one-day events provide a forum that is brief enough to be well attended by interested but busy locals, and gives solid details regarding topics from insurance needs to marketing options.

North Carolina Cooperative Extension has been instrumental in coordinating these types of trainings in other areas, such as the Southeast District 4th Annual AgriCultural Tourism Conference in February 2004, held in Jacksonville, NC, with a similar one-day format.

In addition to providing training, events of this type create networking opportunities for area businesses to link with partners who can meet their business needs, give them ideas, or join with them in forming community-based ecotourism marketing packages.

Tyrrell and Hyde Counties must provide support in the form of direct assistance to locals in getting their new ventures off the ground. One expressed option is to provide a board or liaison who works directly with each new businessperson in understanding how to go about applying for loans or grants (or other funding options), helps in writing business plans, creating marketing programs, writing advertisements, keeping proper accounting records, negotiating leases, securing insurance, getting permits and training, and training service people in superior customer service. While general details can be taught to group classes, there is no substitute for one-on-one guidance to ensure the new entrepreneur is successful, much like an apprenticeship program provided in corporate settings.

Another aspect to be considered and encouraged is the partnership between private entrepreneurs and public venues. Public parks across the U.S. have been highly successful in their programs that allocate concession agreements to private citizens and organizations that wish to provide tourism operations on public lands. With the abundance of public lands in Tyrrell and Hyde Counties, this could become a successful way to supplement local ecotourism.

4. GET YOUTH INVOLVED

“[Youth] are the ones you need – young people ready for a change. Talk to them; they’re the future of the county. I’m the past. What do they want, to stay, to make a life here? Find out what you can do in the county because it’s their futures.” Interviewee 48

A critical goal, for almost all respondents, is providing job opportunities for area youth. Young people interviewed shared a vision that matches the ecotourism industry: the need for opportunities for business leaders, small business ownership, high-tech service jobs, as well as traditional labor and service options. In community-based ecotourism ventures there is ample room for the outdoor enthusiast to live her passion, the social extrovert to interact and educate, the writer, the organizer, the baker and the bookworm to be part of the ecotourism boom.

In preparing for fulfilling these roles, programs that enhance youth self-esteem and leadership skills are needed. Many youth seemed not to realize that, by growing up in this rural area, they have knowledge and skills that are desirable in a community-based ecotourism world. Knowledge of waterways, wildlife, outdoor skills, industrial farming, as well as old “horse and plow” methods, are increasingly valuable in planning and creating ecotourism attractions and ventures.

Leadership and business programs that educate youth in possibilities, and provide paid, start-up or apprentice opportunities, are key to keeping youth in the area, and to growing the ecotourism businesses in these counties.

5. CREATE AND PACKAGE DAY TRIPS

“Maybe the family goes to the beach, but half the family would rather do something else.” Interviewee 45

Creating and packaging day trips allows a variety of tourism businesses to work together, and to capture easily a greater tourism market share. By combining efforts, such as a bed and breakfast working with a picnic caterer, a hiking guide, and a farm tour operator, all vendors can increase their visibility and revenue by sharing marketing and logistical costs, like transportation and food services. Such packages generally provide a more pleasing experience for the ecotourist, while word-of-mouth referrals and repeat customers build successful businesses more quickly than vendors who remain independent.

As stated previously, because the Outer Banks already draws 200,000 tourists per week during the summer season, these “Inner Banks” counties can leverage this market by offering day trip packages that appeal to visitors who already have made a decision to spend their vacation dollars in NENC. One Outer Banks tourism official stated adamantly, “Our tourists are hungry for day trips” (Interviewee 8, 2004), indicating that visitors are looking for activities, other than the beach, to do during their stay.

Tourist data in this study created many potential partial or full-day package options. Some of those data are include here, and elaborated on, in combinations such as:

- A Scuppernong river cruise, which includes lunch supplied by a nice local restaurant, viewing thousands of swans on a lake, kayaking in the Sound, and packaged with a visit to the Red Wolf Center;
- Hiking guide services packaged with a catered picnic, and swan or wildlife viewing, ending in a trip to a Waterfowl Museum;
- A river photo expedition, combined with a guided and educational “flora & fauna” hike to see a wild bear, look for red wolf tracks, and visit the Red Wolf Center;
- Somerset Plantation historical tour packaged with “arts & crafts” demonstrations or classes on historical methods of weaving cottons or baskets, and combined with bird watching and trail walking;
- A visit to the Red Wolf Center combined with a “Kids Nature Adventure” wildlife walk, a visit to a corn maze, and ending in a red wolf howling trip;
- A “From Earth To Table” tour which takes the visitor for a farm tour, and crabbing and fishing demonstrations, and provides a gift basket with catered lunch, along with food goodies such as locally produced jam/jelly, smoked fish, fruit or chips;
- Food, gift baskets and lodging can be partnered with any activities in order to increase revenues for local businesses, while adding to the appeal of a tourist package.

It can be helpful to partner some highly sought activities with some lesser-known activities in order to showcase both. Also, it is necessary to take into account the activity or fitness levels of target customers when thinking about packaging; for example, vendors might not combine parasailing (which targets the high action tourist) with bird watching (which targets the more sedate tourist).

Note that it is important for all Tyrrell and Hyde County tourism businesses to market each other, cultivating the intention to pull tourists into and keep them in the area. The more time visitors spend in the area, the greater the local economic benefit.

6. BUILD TOURISM FACILITIES

“Help out community, try to develop properly; I’d hate to see the area [become] like Maggie Valley or Gatlinburg or Branson, Missouri.” Interviewee 44

It is critical that pioneering entrepreneurs address and provide tourism amenities that are missing, such as: restaurants, shops, small hotels and/or bed & breakfast facilities, internet café and coffee shops, bike or canoe rentals, guiding, hiking supplies, and more. Getting tourists to stop, and spend time and money, leads to full day trips, and ultimately becoming an outright destination.

As these tourism amenities are built, supportive businesses will soon be needed, from computer services and printing shops, to pharmacies and daycares.

With area growth, solid early planning – including zoning as required – can create and maintain the look and type of tourism the local residents want to provide and tourists seek. As the area becomes a tourist destination in its own right, the offerings can grow to providing several of the major vendors (lodging, restaurants) and a major attraction such as an amphitheater if desired. Additionally, the area would benefit from early planning for residential placement, for everyone from affluent new residents to service personnel.

It is noted that this study showed the most common desire of both area residents and the tourists surveyed is a small-town, quaint environment with lots of protected natural beauty and scenic activities. Tourism facilities need to be aligned with the character and feel of this rural “Main Street USA” model.

7. INCREASE COMMUNICATION BETWEEN USFWS AND COMMUNITY

“Did USFWS know this [about red wolf behaviors] to start or find it out later? What made it bad is the people found out on their own, not from USFWS. And I’m not against the red wolf, and I like the USFWS people.” Interviewee 23

Residents expressed a desire for more timely and detailed communication regarding red wolves, the Red Wolf Recovery Program, the pending Red Wolf Center and USFWS programs in general, especially those affecting their community. Regarding red wolves, they want information about births and deaths, hybridization, behaviors, and how wolves

are affecting everything from crops to area wildlife, and whether those patterns are changing as the wolf population grows. They stated they are uninformed about the Recovery Program in terms of dollars spent or planned, hybridization issues and future plans – especially longevity – of the program. Most respondents are not clear on the delineation between USFWS Red Wolf program team and the Red Wolf Coalition, and which organization is in charge of the planned Red Wolf Center.

One suggestion is to ensure that the position of Outreach Coordinator for the USFWS Red Wolf Recovery Program is always filled, and to fill it, if possible, with a local person, to help stem the local feeling that dollars are spent on these programs without regard to giving back to the community.

On the residents' side, it would be helpful to focus attention on the many present-day positive steps taken by USFWS, and on the USFWS personnel whom they respect, as opposed to the habit many residents have of ending positive comments with “but...” that frequently leads into recalling early instances of miscommunication, arrogance, or lack of clarity. It is noted that USFWS has increased communication efforts and provides more detailed information in bulletins and website listings; locals wanting more information might take a more active role in seeking out these data. In that way, general questions are answered, and more specific examples of missing information can be addressed directly to USFWS.

8. CLEAN UP COLUMBIA AT HIGHWAY 64

<p>“Hyde and Tyrrell County desperately need [ecotourism], something to bring jobs and economic development without destroying the land.” Interviewee 28</p>
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The “Gateway to the Outer Banks” from the western region is Columbia, NC. As one drives east on Highway 64 over the Scuppernon River Bridge, the town comes into view. A beautiful waterfront and quaint small town await the visitor, but these are hidden by the overpowering presence of abandoned buildings, broken windows, wrecked cars, weeds, and the ongoing construction of the new bridge and widening of the road to four lanes. As old businesses are closed, new ones are being built – but the first impression is that one has entered a ghost town. Columbia does not beckon to the visitor as a place to stop and shop.

The main attraction, and positive draw for tourists, is the new Tyrrell County Visitor Center Complex at the bridge, consisting of a small Visitor Center building, rest rooms, and the offices and welcome center of the USFWS Pocosin Lakes National Wildlife Refuge, with its animal displays, short film, gift shop, and nature board walk that makes a half-mile loop through the riverside forest. This Center is what draws visitors to stop.

In order for visitors not only to stop, but also to spend time and dollars in Columbia, the town needs a beautification program to show off its strengths, with easy directional signage and abundant promotion of local attractions.

9. GENERAL SUGGESTIONS REGARDING SWOT RESULTS

➤ **Signage**

Place an attractive, large carved-letter sign “Visitor Center” on roof of Tyrrell County Visitor Center, in the style of the TCCDC sign. Painted words “Wildlife Visitor Center” on the tin roof of Pocosin Lakes NWR Visitor Center would mirror “old barn” country rustic signs, and attract naturalists (and cars with kids of all ages) into the NWR gift shop. Also helpful would be signs in the Tyrrell County Visitor Center (and restroom area) directing tourists to the waterfront boardwalk, and signs touting the very appealing Pocosin Lakes’ gift shop and auditorium at the other end of the complex, which is often missed.

➤ **Attitude**

Tyrrell County has benefited from ample studies related to economic development through tourism. The next step needed is execution, and reliance on outsiders to assist hinders the locals. If Tyrrell and Hyde County residents do not have capacity (funding, staffing, time) to start ventures, then Tyrrell and Hyde will need to attract experienced outside tour operators to come in and provide the tourism services. Ideally, these operators would partner with local residents, or be under an agreement to hire locally. However, initial inquiry and action needs to come from locals, if local residents want to maintain a substantial level of control in their region’s tourism growth.

➤ **Use of Downtown Space**

Government offices currently occupy a large portion of downtown Columbia’s waterfront space. These waterfront properties are the most highly sought areas for attracting tourism and much of that usefulness is now being missed. Local offices could be relocated to outlying areas; even moving a few blocks away from core downtown would allow maximum tourist draw, and still achieve office accessibility for locals. This would allow implementation of a core tourism waterfront attraction area, for both locals and visitors.

➤ **Marketing Focus**

Tyrrell & Hyde Counties must promote local tourism attractions first, and give Outer Banks attractions a back seat. We repeatedly noted during our survey trips that both tourism displays and conversations by Tyrrell County hospitality personnel focus first and primarily on Outer Banks options. While we do not advocate a sense of competition with Outer Banks, it is recognized that Outer Banks’ popularity is already in the forefront, and that the point of Tyrrell and Hyde marketing efforts must be to raise awareness of the “add-on options” that tourists can find by taking a side-trip into the beautiful natural region these counties have to offer.

An example of this focus would be to display a brochure highlighting “Twenty Things To Do in Tyrrell & Hyde,” which simply gives a “teaser” listing, plus a sentence or two and contact information for each. By prominently placing this brochure with every Tyrrell and Hyde County merchant, the odds increase that tourists will quickly see something of personal interest on the list, and have an easy way to get more information about the desired attraction.

➤ **Marketing Strategy**

It is acknowledged business wisdom that it is easier to keep a current customer happy than to acquire a new customer. A marketing strategy for the “Inner Banks” area of Tyrrell and Hyde Counties is based on this concept. Even at capturing one percent of Outer Banks’ weekly summer tourism market, Tyrrell and Hyde County visitation would be 2,000 people per week, which could provide ample tourist influx for these counties to create many new economic opportunities. These ventures could serve both locals and tourists, while keeping tourist numbers small enough to protect natural resources and local beauty.

Ecotourism officials could begin by creating a regional marketing campaign such as “Destination: One Percent!” The intention here is to give local residents, current business owners, elected officials, and entrepreneurs a documented goal of making Tyrrell County and Hyde County a destination, and begin to build needed tourism infrastructure in the process.

CONCLUSIONS

For red wolves to contribute to the local economy, the Red Wolf Center has to be built. We stress this, along with a tourism plan for the area which includes participation from rural residents, and local training in the aspects of ecotourism that residents seek. These are the key next-steps for these communities, if they are to take advantage of the times, and their unique natural assets.

As for the red wolf, time has mellowed local attitudes. Where many landowners were adamantly against the program in the 1990s, most residents are impartial about the animal itself. At the same time, the great majority of residents interviewed were not happy about the government's continued involvement in wolf recovery after 17 years, as they believed a viable species should, by now, be able to live on its own, and therefore the amount of tax dollars spent on the recovery program is not justified.

The key in this mix is that all local residents we interviewed expressed that if the red wolf could bring tourists and tourist revenue to the area, then they would feel better about the Red Wolf Recovery Program. Residents said that the Red Wolf Center would be a positive contribution to this effort, and tourists agreed – with 89% of those interviewed wanting to come visit the Center once it opened.

Tyrrell and Hyde Counties are on the brink of a new era – an era of tourism development, coupled with wildlife conservation. They are situated physically in an area that supports great natural beauty, and has a thriving, sympathetic tourism market close by at the Outer Banks.

It is up to the local residents of these two counties to consult and form a tourism development plan. To date, not much is obvious in the way of tourism infrastructure, and both counties seem to exist in a bygone era of farmlands and sleepy towns. However, this ambiance is one of its greatest assets – their quaint small town settings and rural beauty. At the same time, development is poised to boom in Columbia, and with the new Scuppernon bridge, a widened Hwy 64 through town, and an extensive number of new housing lots being built, Columbia is positioned to receive many more visitors, and outside people moving in to make this area their home.

This influx of outside residents, and travelers, has positive and negative impacts. It brings in new revenue, and expands the tax base; it also brings in people with potentially differing visions for the future of these rural lands and communities.

Local farmers, guides, and businesses in Tyrrell and Hyde Counties are not quite ready to embrace an influx of Outer Banks tourists. They have the assets – the knowledge of the wildlife, waterways, farmlands, enthusiasm and openness to ideas – but not the time, nor training, in how to provide these activities to tourists. There is a desire by some to begin immediately in this area. As these first few step forward to offer ecotourism ventures, it is imperative that they succeed. Nothing breeds success like success, and failure like

failure. When a few brave locals get involved in tourism and succeed, they serve as models for others to get involved as well. When ventures fail, as some have in the past, it becomes difficult for some to see the value in these enterprises and put their effort into these types of businesses. Therefore, it is important for county, town and extension agencies to supply community-based ecotourism entrepreneurs with assistance and access to low interest loans, hospitality training, and regional marketing. The more people work together and combine their assets, the more successful these ventures can be – with the results that everyone benefits by a better and more dynamic community.

“I wish people weren’t so divided. I wish there was more love.” Interviewee 48

This study acknowledges the need to preserve and support the recovery of red wolf populations in this NENC area. As our data indicate, in order for the red wolf to survive, it is necessary for future development of this area to limit itself to those activities and infrastructures that still allow a base of rural lands, with farming and fishing, open fields and woodlands, undisturbed forests alongside streams and waterways, abundant game, low sound levels, narrow roads with limited traffic – all of the necessities for wolves, and the attractiveness for tourists to view and interact with wolves.

Additionally, tourists want amenities: places to stay, to eat, to shop, do other activities. As long as these are consistent with the rural settings described above, both tourists and residents can benefit from each other, and from the red wolf and other wildlife. It is when development goes beyond these rural stages that tourism can clash with the wolf and its market draw – as well as its survival.

So, how much is too much? Residents want the conveniences of a Wal-Mart, but also don’t want to lose their small town’s distinctive ambiance. It is a developmental dilemma that is occurring at every small town in America. Zoning is a primary solution, and yet it can be perceived as “the community” stepping on individual property rights. So, what does the community want? This study indicates that residents’ current preference is for moderate development. As long as residents in Tyrrell and Hyde Counties want primarily to farm and manage the lands for wildlife and rural products, then these counties can continue to support the red wolf and its ecotourism ventures.

“I don’t think the potential is there to overrun Tyrrell County with tourists. With wildlife viewing and nature, I think the people who come here are going to be the more educated, more respectful people.”

Interviewee 44

“Columbia reminds me of Asheville fifty years ago.” Interviewee 41

Landowners believe that incoming tourists will be those concerned about wildlife, both desiring and respectful of small-town, rural values; and our studies of Outer Banks tourists seem to concur. However, if community residents inadvertently abdicate their participatory power and control, over the quantity and quality of tourism development, to investors with a vision for “bigger is better,” then this “Inner Banks” region could become a magnet for mass tourism that would neither support community members nor the wild red wolves.

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APPENDIX A

Community Survey Instrument

Date:

Name & contact info:

Your occupation:

How far is your farm / business from:

1. Columbia downtown
2. Hwy 64 or other major road
3. State parks, refuges
4. Waterways, wetlands
 - A. Other

[If business, begin with questions 66-81]

Land profile - Your land / Tyrrell County (TC)

6. Size / acreage
- 6a. Own/lease?
7. Crops / land use
8. Wildlife (acres in habitat vs. Crop)
9. Land attractions
 - Your:
 - TC:
10. Water attractions:
 - Your:
 - TC:
11. Farming / operations attractions:
 - Your:
 - TC:
12. Attractions for hobbyists (birders, photographers, etc.)
 - Your:
 - TC:
13. Other (cultural, historical, etc.) Attractions:
 - Your:
 - TC:

Your past or current experiences

14. Have you had visitors come onto your land?
 - If yes, what for? *(if answer hunters, go to #18-26)*
15. Did you receive income from visitors on your land?
 - If yes, what range, for last year:
 - < \$5000
 - \$5000 to \$20,000
 - >\$20,000
16. What was your experience with visitors?
17. What rules do you have for visitors coming onto your land?
18. Do you lease your land to hunt clubs or friends?
19. What are typical trespass fees for leased hunting rights?
20. Did you receive income from hunters on your land?
 - If yes, what range, for last year:
 - < \$5000
 - \$5000 to \$20,000
 - >\$20,000
21. What has been your experience with having hunters on your lands?

22. What rules do you enforce for hunters on your land?
23. Do you guide outside hunters who come onto your land?
24. What are typical guided hunt fees?
25. Do you provide lodging/food?
26. Do you have stands or platforms on your land?
27. What has been your experience with other people coming onto your land?
Fish & wildlife personnel
Any others:

Environmental conditions / attractions

28. What wildlife species are on your lands that could be used for tourism opportunities?
Birds
Small mammals
Bears
Wildcats
Red wolves
29. What has been your experience with wildlife on your lands & in the area?
30. Have there been costs from wildlife on your land?
If yes, what? *(if they list "negative" experiences above, ask, "would you consider any of these experiences a cost?")*
31. Have there been any benefits from having wildlife on your lands? If yes, what?
32. What about red wolves? Have they been a cost to you?
33. Have you received any benefits from having red wolves in the area? What are they?
34. Have red wolves lowered populations of "nuisance animals?"
If yes, which species?
35. Have red wolves affected the deer populations? If so, how?
36. Have red wolves helped control or contain coyotes?
37. What benefits (to you or others), if any, would balance your costs associated with red wolves and other wildlife?
38. In order to attract tourists to the county area, how would you feel about using red wolves as a marketing draw?
39. Have red wolves brought any tourism to the area?
Could they? How?
40. Do you have any other thoughts or comments about red wolves?
41. What are you doing, if anything, to promote conservation of wildlife?
42. Have you partnered, or done things, with any of the refuges or conservation groups in the area?
43. Any other comments about conservation?

What you can do for future

44. In future, would you want to have tourists come onto your land? If yes, doing what?
45. Would you want to guide visitors yourself or use a hired guide (for a fee)?
46. What seasons/months would you be open for tourists?
47. What tourist profile would you be interested in (groups, families, adults only, schoolkids, etc.)
48. Do you have any concerns about visitors on your land? What?
49. What rules for tourists would you enforce on your land?
50. Where would tourists stay if coming to your land?
51. Would you be interested in providing lodging or food for tourists who came to your property?
Describe.
52. What new attractions do you think the county could offer that would attract tourists?
53. What other kinds of development would you like to see in the county?
54. What kind of development would you not like to see?

Future needs / next steps

55. What are the next steps needed to create beneficial ecotourism in this county?
56. Would it be useful for landowners to form (or join) a cooperative or association for tourism?
Describe.
57. Any other groups or organizations to be formed?
58. How would you go about getting local youth involved in tourism as entrepreneurs?
59. What kind of training, if any, do you want or need in order to bring tourists to your lands?
(hospitality, business, etc.)
60. Would you be interested in visiting other agri-tourism sites?
61. Other ideas that would be helpful?
62. What can we ask in our summer survey of tourists that would benefit you?
63. What else would you like to see this survey accomplish?
64. Any other comments for this survey you would like to add?
65. Are there other people you recommend we talk to for this survey?

For general businesses:

66. What type of business?
67. How long have you been in business?
68. What is your goal for this business?
69. Why locate in Tyrrell county?
70. What is your target customer?
71. How many _____(rooms & beds, boats, sq. Ft, etc.) Do you have?
72. What is your current typical occupancy rate/sales volume (% of capacity)?
73. When is your peak season?
74. What is the employment market like? Any concerns about the labor force? (# of employees)
75. Do you offer other services? (meals, canoe trips, classes, etc.)
76. What percentage (%) of your business is from tourists (vs. Local residents)?
77. As a business person, what to you is important about tourism?
78. How can tourism in the Tyrrell county benefit you?
79. Are there negative aspects to tourism?
80. Are there other businesses you would like to form "tourist packages" with?
81. Please give us copies of your literature!

APPENDIX B

Community Informed Consent Form

Red Wolves: Creating Economic Opportunity through Ecotourism in Rural North Carolina

Dear Tyrrell/Hyde County Resident:

This project is designed to determine the potential for ecotourism based on red wolves and other wildlife in rural northeastern North Carolina. This study will focus on the local interest and ability to create community-based ecotourism ventures, and will also assess market demand of Outer Banks tourists. The ultimate goal of this project is to document the voices of rural residents and place these into recommended actions which can assist the community in establishing a program that will enhance the local economy while conserving endangered red wolves.

You are asked to participate in an interview given by me or my assistant. You will be asked questions to which you can respond freely, with any thoughts that you may have on the subject. The researcher will write down your responses in a notebook as you are talking. The results of this participation will be confidential, and will not be released in any individually identifiable form without your prior consent, unless otherwise required by law. Your identity will be coded, and all data will be kept in a secured location. Your identity will not be revealed in any publication of the results of this research. Answers involving locations of things (waterways, wildlife areas, etc.) may be used to make a map of current tourism opportunities. The interview will take approximately two hours to complete.

Farmers, land managers, fishermen, guides, local residents, and tourism-based businesses will be asked to be interviewed, as well as refuge personnel, town and visitor management. You have the right to decline the interview, or to withdraw from the interview at any time without penalty. Your participation does not involve any foreseeable risks, discomforts or stresses. The benefits you may expect from this study are that your opinions and interest in ecotourism development and red wolf/wildlife conservation will be reported (without your name listed) and hopefully used to generate positive next-steps, action plans, and policies. The researcher will answer any further questions about the research, now or during the course of the project, and can be reached at the address/phone below.

Dr. Lash is the principle investigator in this study. She is contracted on this project by Defenders of Wildlife, a non-profit conservation organization in Washington, DC through a grant from the Alex C. Walker Foundation. Ms. Black is assisting Dr. Lash with this project.

Sincerely,

Dr. Gail Lash
366 Oakland Ave., SE
Atlanta, GA 30312 USA
Telephone: 1-404-222-9595
Cell: 1-404-277-4483

Ms. Pamela Black
2574 Winding Lane, NE.
Atlanta, GA 30319 USA
Telephone: 1-770-936-8629
Cell: 1-404-314-9331

APPENDIX C

Tourist Survey Instrument

JUNE 10 – 14, 2004

Hello, I'm _____ from Defenders of Wildlife & the Red Wolf Coalition Research Team.

We are interviewing people about their travel & vacation choices regarding red wolves & other wildlife in Northeastern North Carolina, to see if ecotourism can help preserve the red wolf and also contribute to local community development. I would like to include your opinion. Your responses are confidential, and your name is not recorded. This survey will take about 5 minutes.

1. Had you heard that the red wolf is an endangered species?

Yes

No

2. Did you know that red wolves are located just 35 miles inland from the Outer Banks?

Yes

No

I need to take a few seconds to describe to you the efforts to save this wolf from extinction. The *only* place in the world where red wolves ever lived was in the southeast portions of the United States. About 25 years ago the red wolf was almost extinct. A few wolves were captured and bred in captivity. In 1987, the U.S. Fish and Wildlife Service began to reintroduce some of the captive red wolves back into the wild. All wolves were fitted with radio collars that allow biologists to keep track of their movements. Currently, about 100 red wolves now live in 5 counties just west of the Outer Banks. Red wolves have a strong instinct to avoid humans, and no person has ever been attacked by a red wolf.

3. Prior to this survey, had you heard or read about the red wolf reintroduction project?

Yes

No

4. Were you aware that there are trips where you can hear red wolves howl?

Yes

No -- skip to intro on RW Center, after 5

5. Have you ever been on a red wolf howling trip?

Yes

No

The Red Wolf Coalition is planning to build a Red Wolf Center near Hwy 64 at Columbia, NC – about 35 miles west of the Outer Banks. It will include information and displays on the red wolf recovery program, habitat, behavior patterns, food sources, and include short films, gift shop, interactive radio tracking, and most importantly, a live pair of red wolves (which could not be re-released into the wild) in a naturalistic exhibit.

6. Would you be interested in visiting the Red Wolf Center?

Yes

No – skip to 8

7. What is the maximum amount would you be willing to pay, per person, as admission charge to this Center?

RECORD \$ AMOUNT _____

GIVE RESPONDENT THE SURVEY, AND HAVE HIM/HER MARK ALL FURTHER RESPONSES.

8. Please read this list of places, amenities, and activities you might experience while traveling in this area, and rate how important each one is to you, on a scale of one to five, with 1 the least important and 5 the most important.

	Least				Most
a. <u>Enjoying the beach</u>	1	2	3	4	5
b. <u>Shopping at malls or outlets</u>	1	2	3	4	5
c. <u>Enjoying unspoiled nature</u>	1	2	3	4	5
d. <u>Wildlife viewing & bird watching</u>	1	2	3	4	5
e. <u>Relaxing in a peaceful rural setting</u>	1	2	3	4	5
f. <u>Visiting historical sites and landmarks</u>	1	2	3	4	5
g. <u>Environmentally-sound tourism operations</u>	1	2	3	4	5
h. <u>Local artisans and crafts</u>	1	2	3	4	5
i. <u>Learning more about nature</u>	1	2	3	4	5
j. <u>National parks or protected areas</u>	1	2	3	4	5
k. <u>Water activities such as paddling</u>	1	2	3	4	5
l. <u>Learning about local Indian cultures</u>	1	2	3	4	5
m. <u>Casual walking</u>	1	2	3	4	5
n. <u>Physically challenging activities</u>	1	2	3	4	5
o. <u>A clean, safe environment</u>	1	2	3	4	5
p. <u>Easy directional and business signage</u>	1	2	3	4	5
q. <u>Attractive, landscaped streets & buildings</u>	1	2	3	4	5
r. <u>Quaint, small-town setting</u>	1	2	3	4	5
s. <u>Bustling nightlife</u>	1	2	3	4	5

9. Please rate, on a scale of one to five, how likely is it that you, or your family, would participate in the following activities, given the opportunity, with 1 the least likely, and 5 the most likely.

	Least				Most
a. <u>Trail walking to view plants and wildlife</u>	1	2	3	4	5
b. <u>Kayaking or canoeing on a river</u>	1	2	3	4	5
c. <u>Viewing a wild bear</u>	1	2	3	4	5
d. <u>Walking a corn maze</u>	1	2	3	4	5
e. <u>Bird watching</u>	1	2	3	4	5
f. <u>Farm tour on growing corn or potatoes, with homemade pies & jams</u>	1	2	3	4	5
g. <u>Hay ride</u>	1	2	3	4	5
h. <u>River cruise</u>	1	2	3	4	5
i. <u>Photographing wildlife from a blind</u>	1	2	3	4	5
j. <u>Learning about Indian history and artifacts</u>	1	2	3	4	5
k. <u>Red wolf howling</u>	1	2	3	4	5
l. <u>Skate board park/ Recreational center</u>	1	2	3	4	5
m. <u>Visiting a Farmer's Market</u>	1	2	3	4	5
n. <u>Looking for signs of a red wolf in the wild, like their tracks or scat</u>	1	2	3	4	5
o. <u>Viewing thousands of swans on a lake</u>	1	2	3	4	5
p. <u>Visiting the Waterfowl Museum</u>	1	2	3	4	5
q. <u>Crabbing</u>	1	2	3	4	5
r. <u>Learning about the seafood industry</u>	1	2	3	4	5
s. <u>Visiting the Red Wolf Center with captive red wolves</u>	1	2	3	4	5
t. <u>Hunting deer, quail, or waterfowl</u>	1	2	3	4	5
u. <u>Hunting a bear</u>	1	2	3	4	5

10. If you could package 3 or 4 of these activities together into a day trip, located 35 miles west of the Outer Banks, which ones would you include? (CIRCLE THEM)

[AND: What's the maximum you would you pay for each activity you chose?]

- a. Trail walking to view plants and wildlife
- b. Kayaking or canoeing on a river
- c. Viewing a wild bear
- d. Walking a corn maze
- e. Bird watching
- f. Farm tour on growing corn or potatoes, with homemade pies & jams
- g. Hay ride
- h. River cruise
- i. Photographing wildlife from a blind
- j. Learning about Indian history and artifacts
- k. Red wolf howling
- l. Skate board park/ Recreational center
- m. Visiting a Farmer's Market
- n. Looking for signs of a red wolf in the wild, like their tracks or scat
- o. Viewing thousands of swans on a lake
- p. Visiting the Waterfowl Museum
- q. Crabbing
- r. Learning about the seafood industry
- s. Visiting the Red Wolf Center with captive red wolves
- t. Hunting deer, quail, or waterfowl
- u. Hunting a bear

11. If a tour operator offered this day trip, what is the maximum amount you would be willing to pay, per person, for this tour? RECORD \$ AMOUNT _____

12. On THIS vacation, if there were a bunch of packaged tours that you were interested in, located 35 miles inland, how many days of your vacation would you want to spend taking these tours?

- None
- 1-2
- 3-4
- 5 or more

13. Do you think that you will return to northeastern North Carolina in the next 5 years?

- Yes
- No – skip to 15

14. On FUTURE vacations to this area, how many days of your vacation would you want to spend taking these packaged tours, located 35 miles inland?

- None
- 1-2
- 3-4
- 5 or more

15. What kind of accommodations do you prefer on a trip to northeastern North Carolina?

- Bed and Breakfast (under 5 rooms)
- Cabin
- Small Inn (5 – 10 rooms)
- Small Hotel (11 – 35 rooms)
- Large Hotel (over 35 rooms)
- Rental house
- Other _____

16. Would you be willing to stay at accommodations around Columbia, NC, just 35 miles west of the Outer Banks, on your next trip, and make day trips to the Outer Banks?

Yes

No

TRAVEL & PERSONAL INFO

17. **Columbia Visitors only:** Are you on your way TO the Outer Banks?

Yes – skip to 19

No

18. **Columbia Visitors only:** Are you coming back FROM the Outer Banks?

Yes

No

19. On this trip, do you plan to stay, or have you stayed, overnight in Columbia, NC?

Yes

No – skip to 21

20. How many nights?

RECORD NUMBER _____

21. How many nights are you staying in the Outer Banks?

RECORD NUMBER _____

22. Do you have access to a car on this trip, in order to take a day trip?

Yes – skip to 24

No

23. How do you get from place to place while visiting here?

Stay in one place

Friend/family takes me

Public transport

Walk

Bicycle

Motorcycle

Other _____

24. Please indicate all the marketing channels you were aware of for northeastern North Carolina before you arrived.

Internet Web Sites

Friends and Families

Travel Guide Books

Tourism Magazine or Brochures

Magazine Advertisements

Newspaper Advertisements

Television Advertisements

Other

25. Which of the following most accurately describes your situation as a visitor?

Traveling with my family

Traveling with friends

Traveling with an educational institution or religious group

Traveling alone

26. How many people in your group? RECORD NUMBER _____
27. What state do you live in?
NC, DC, VA, PA, DE, MD, SC, Other _____ RECORD STATE

We ask these last few questions for classification purposes only, so that we can group your responses with those of others we have interviewed.

28. Are you single or not?
Single
Not single
REFUSED
29. How many adults live in your household? RECORD NUMBER _____
30. How many children under the age of 18 currently live in your household?
RECORD NUMBER _____
31. Which of the following best represents the last grade of school you completed?
Less than high school
High school
Some college/technical school
College graduate
Post graduate
REFUSED
32. Which of the following categories best represents the total annual income for your household before taxes?
Under \$50,000
\$50,000 but less than \$75,000
\$75,000 but less than \$100,000
\$100,000 but less than \$125,000
\$125,000 but less than \$150,000
\$150,000 or more
REFUSED
33. What is your age? RECORD NUMBER _____

THANK RESPONDENT!

This survey will help inland residents develop tourism packages that you want to experience, as a way to bring in revenue that will benefit conservation of the red wolf and local communities.

Ask if they'd like Gail's business card, if they wish to contact us – give, if yes.

RECORD GENDER

Male
Female

INTERVIEWER NAME: Pamela Black Gail Lash
DATE OF INTERVIEW _____

LOCATION OF INTERVIEW:

Manteo Visitor Center
Kitty Hawk Visitor Center
Columbia Visitor Center
NC Aquarium, Manteo
Other _____

APPENDIX D

Extra Tourist Data Results

12. If had packages, how many would you take on this vacation?

10% said none
72% said 1-2 tours
16% said 3-4 tours
2% said 5 or more tours

13. Come back to NENC in next 5 yrs?

92% yes, 8% no

14. If had packages, how many would you take on future vacation?

3% said none
72% said 1-2 tours
19% said 3-4 tours
6% said 5 or more tours

15. Preferred type of accommodations:

Bed and Breakfast	13%
Cabin	11%
Inn	9%
Small Hotel	19%
Large Hotel	13%
Rental House	35.5%
Other	15.5%

Other = unspecified (3%), Camp (7%), timeshare (2%), RV (1.5%), condo (0.5%), resort 0.5%), own house or family (1%)

16. Would you be willing to stay in Columbia on your next trip, and make day trips to the Outer Banks?

No	51%	(99/194)
Yes	49%	(95/194)

17. On way to Outer Banks? 13 no; 32 yes n= 45

18. On way from Outer Banks? 13 no; 12 yes n = 25

19. Did you stay in Columbia overnight? 160 = no; yes = 10; n= 170

20. How many nights (in Columbia)?

1 resident; 1 of 7 nights; 2 of 6 nights; 3 of 5 nights; 1 of 4 nights; 2 of 2 nights; 2 of 1 night; 1 of 0 nights
n=13/200 = 6.5% but let's do n=12 = 6%, and cut out the one that stayed 0 nights.

So, of the 6% who stayed in Columbia:

0.5% is a resident in Columbia
0.5% stayed for 7 nights
1% stayed for 6 nights
1.5% stayed for 3 nights
0.5% stayed for 4 nights
1% stayed for 2 nights
1% stayed for 1 night

21. How many nights are you staying on the Outer Banks?

N = 194 :

7 are residents (4%),
1 person is staying for 90 nights (0.5%),
1 person for 30 nights (0.5%),
1 for 21 nights (0.5%),
1 for 10 nights (0.5%),
4 for 8 nights (2%);
49 for 7 nights (25%);
17 for 6 nights (9%);
17 for 5 nights (9%);
22 for 4 nights (11%);
21 for 3 nights (11%);
15 for 2 nights (8%);
16 for 1 night (8%);
22 for 0 nights (day-trip only) (11%).

22. Do you have access to a car?

All (198.5%) have access to a car – only 1.5% say no, and they are 13 & 14 years old.

23. cab – 14 yr. old said; friends/family takes me is what the other person said (child).

No one else answered this.

24. Marketing channels aware of:

Internet	116/202 = 57%
Friends & Family	138/202 = 68%
Travel Guide Books	105/202 = 52%
Tourism Mags & Brochures	76/202 = 38%
Magazine Ads	31/202 = 15%
Newspaper Ads	24/202 = 12%
TV Ads	29/202 = 14%
Other	24/202 = 12%

25. Which most accurately describes your situation as a visitor?

Traveling with my family	162/200 = 81%
Traveling with friends	33/200 = 17%
Traveling with an educational institution or religious group	2/200 = 1%
Traveling alone	3/200 = 1%

26. How many people in your group?

N=201

1	= 3/201 = 1.5%
2	= 75/201 = 37%
3	= 29/201 = 14%
4	= 36/201 = 18%
5-9	= 38/201 = 19%
10 –19	= 15/201 = 8%
20 or more	= 5/201 = 2.5%

27. Where are you from?

N=200

AR = $1/200 = 0.5\%$

Australia = $2/200 = 1\%$

AZ = $1/200 = 0.5\%$

CO = $5/200 = 2.5\%$

DC = $2/200 = 1\%$

DE = $2/200 = 1\%$

England = $1/200 = 0.5\%$

FL = $10/200 = 5\%$

GA = $6/200 = 3\%$

ID = $1/200 = 0.5\%$

IL = $3/200 = 1.5\%$

IN = $4/200 = 2\%$

Italy = $1/200 = 0.5\%$

KY = $6/200 = 3\%$

MD = $6/200 = 3\%$

MI = $1/200 = 0.5\%$

MO = $1/200 = 0.5\%$

NC = $67/200 = 33.5\%$

NJ = $3/200 = 1.5\%$

NM = $1/200 = 0.5\%$

NY = $1/200 = 0.5\%$

OH = $10/200 = 5\%$

OR = $1/200 = 0.5\%$

PA = $21/200 = 10.5\%$

SC = $3/200 = 1.5\%$

TN = $11/200 = 5.5\%$

TX = $2/200 = 1\%$

VA = $24/200 = 12\%$

WV = $3/200 = 1.5\%$

70.5% are from the eastern time zone.

28. Single or not?

Single = $61/199 = 31\%$

Non-single = $138/199 = 69\%$

29. How many adults live in your household?

N=198

1 adult = $26/198 = 13\%$

2 adults = $141/198 = 71\%$

3 adults = $21/198 = 11\%$

4 adults = $8/198 = 4\%$

5 adults = $1/198 = 0.5\%$

6 adults = $1/198 = 0.5\%$

30. How many children (under 18) live in your household?

N=194

0 children = $119/194 = 61\%$

1 child = $34/194 = 18\%$

2 children = $29/194 = 15\%$

3 children = $8/194 = 4\%$

4 children = $2/194 = 1\%$

5 children = $1/194 = 0.5\%$

6 children = $1/194 = 0.5\%$

31. Education level?

Less than high school	= 10/199 = 5%
High School	= 39/199 = 20%
Some college/tech school	= 50/199 = 25%
College graduate	= 51/199 = 26%
Post graduate	= 46/199 = 23%
Refused	= 3/199 = 1%

32. Income level?

Under \$50,000	= 49/199 = 25%
\$50,000 to < \$75,000	= 58/199 = 29%
\$75,000 to < \$100,000	= 34/199 = 17%
\$100,000 to < \$125,000	= 20/199 = 10%
\$125,000 to < \$150,000	= 4/199 = 2%
\$150,000 or more	= 8/199 = 4%
Refused	= 26/199 = 13%

33. Age?

(n=201)

10-19	= 16/201 = 8%
20-29	= 22/201 = 11%
30-39	= 30/201 = 15%
40-49	= 49/201 = 24%
50-59	= 39/201 = 19%
60-69	= 34/201 = 17%
70-79	= 9/201 = 5%
80-89	= 2/201 = 1%

34. Gender?

Male	92/202 = 46%
Female	110/202 = 54%

35. Interviewer?

Pamela Black	106/202 = 52%
Gail Lash	96/202 = 48%

36. Location of Interview?

Manteo Visitor Center	89/202 = 44%
Kitty Hawk VC	33/202 = 16%
Columbia VC	40/202 = 20%
NC Aquarium in Manteo	40/202 = 20%

APPENDIX E

Resident Quotations

REGARDING RED WOLVES

1. I think they actually help. We like to quail hunt, and red wolves take care of raccoons, possum, nutria and snakes – the pups learn on them. So our quail population is going up. And I just like to see them; I think they're pretty.
Interviewee 47
2. The Lord saw fit to have them [red wolves] gone. Interviewee 46
3. Realistically, you don't know what that animal's gonna do; he's wild.
Interviewee 45
4. They don't hurt us. We've got a big enough area. You've got more chances of stepping out in the yard and having a problem with a rattlesnake than a red wolf. They're scared of you. Interviewee 47
5. Outsiders come in and bring in these wolves and if they're wrong, they can leave and we're stuck with a big, dangerous problem. Interviewee 37
6. They were not true red wolves to start with that they released here; they were hybrids. Interviewee 40
7. Red wolves breed with anything that's out there, coyotes or hunting dogs. We end up with canids – a dog-like animal. Interviewee 38
8. The only problem I have is the tax dollars spent. I can see putting them back out and saying 'Here you go' but we carry analyzing them too far. Interviewee 44
9. About the only way we know we've got a red wolf is if they've got a collar. I can't tell a red wolf from a coyote unless it's collared. Interviewee 38
10. I haven't had any dealings with the red wolf. My first impression was "Why do we need 'em?" But I looked at it that man hurt the bald eagle then saved it by finding out what the problems were and fixing them. I'd probably have a problem [with red wolf] if I had sheep or animals. Interviewee 34
11. I don't have a problem with trying to re-establish a species indigenous to an area that is gone. At the same time, let's use common sense. At first they [FWS] were talking about babysitting them for 2 years, maybe 3, but it's been 10 years. If they can't survive by themselves maybe they don't need to.... We need to stop spending millions of dollars a year on an animal that's not surviving. Spend

millions instead on people who are handicapped or can't work, or with a particular animal that potentially really can survive. Interviewee 40

12. I ain't against the red wolf either; I think he's got a place. I just wish it was like we thought it was gonna be when we started. I guess that was naïve of us to think so. It's not worth one kid missing one breakfast because of that red wolf program. And we've had trappers who depended on trapping go out of business. Interviewee 23

13. Red wolves are making the deer hunters madder than the farmers. Interviewee 45

REGARDING U.S. FISH & WILDLIFE SERVICE

14. [Federal government] says they're managing the land for the wildlife but they're not because they're flooding the land. It's backed up; you can walk knee-deep through some of the woods. Red wolves don't like it on USFWS lands so they come over on our lands. Deer can't even find a place to bed down. They say they're pleasing the wildlife, not the people, but they're not. And they say they're cooperating with landowners, but they're not. Interviewee 38

15. [About red wolf behaviors] Did USFWS know this to start or find it out later? What made it bad is the people found out on their own, not from USFWS. And I'm not against the red wolf, and I like the USFWS people. Interviewee 23

16. USFWS are a primary landowner and they've got to be a part to make it work. And it won't be a quick thing. Interviewee 38

17. USFWS says 'We can come onto your land anytime we want to and do anything we want.' Some of them are really nice but one bad one spoils things. Interviewee 37

18. [Regarding Red Wolf Recovery Program] Lots of resentment still from the way USFWS handled it. I think as time goes by more and more people will accept. Interviewee 28

REGARDING WILDLIFE AND CONSERVATION

19. We Americans go all the way to the right, then all the way to the left; we need to stop in the middle for awhile. Interviewee 23

20. Once OLF becomes operational, swans and waterfowl will fly right over and leave. [I] think they already have permission for Military Operational Airspace to fly over the whole 5-county area at any ceiling. If OLF comes in, tourism here may be short-lived. Interviewee 20

21. All this land and the wildlife, it's got to pay or we're gonna have to go back to ditch farming, or desert, or spraying chemicals all over the damn place. Interviewee 28
22. Some things you can't put a real dollar value on, like setting aside a wilderness area or water refuge. It may return some [money], or [bring] tourists, but you do it for aesthetics and preservation. Interviewee 44
23. [Regarding swans in the impoundments] It's like snow sometimes. Interviewee 47
24. Don't want to put my land into duck impoundments or conservation easements because of government restrictions and control; they control us too much as it is. Interviewee 40
25. Farmers complain about animals but really we still feed 'em, take care of 'em – but the wildlife people get the credit for it. Thirty years ago you couldn't eat a deer; they ate berries, game was too wild, the meat stunk. Now you're getting grain-fed deer and bears. Interviewee 45
26. We can't go out here and take each others' freedoms away just because it's not our cup of tea. We've got to stop imposing our [conservation or private property] values on others. As long as it's within the confines of the law, it's a free country and we should stay out of it. Interviewee 28
27. The best way to protect the environment is to educate the people, and you can't count on the government to do it. Interviewee 23

REGARDING TYRRELL & HYDE COUNTIES

28. Don't want this to be like the Outer Banks. I choose to live here, not there. Interviewee 20
29. Columbia reminds me of Asheville 50 years ago. Interviewee 41
30. We would not have the wildlife we have today if it weren't for high intensity farming. Interviewee 40
31. There's a lot of kids, even those who went to college and living in Greenville, who'd love to move back here. But you can't expect a kid with a college doctorate to come back and drive a tractor for \$6 an hour. Interviewee 20
32. I don't see nothing going good for Hyde County right now. This hurricane's got us tied up for a good while to come. Interviewee 23

33. In 1980 there were probably 25 duck impoundments in Hyde; now there are more than 500. Interviewee 20
34. [Farming] here is larger scale, commercialized. The Wal-Mart system has taken over; if we want to feed large numbers of people on an economic scale like that we have to produce efficiently. Interviewee 44
35. Fifty years ago every farmer had a milk cow, chickens and a hog. Now there's two people got a hog. And there weren't no thousand acre farms; they were 20-30 acres. Interviewee 48
36. Here in this Scuppernong community, when I was a kid there were 35-50 different farms.... Today there are only two farms of any size, and two more of 20-40 acres. The total acreage being farmed is the same, but fewer people. Interviewee 40
37. There are no ordinances to keep casinos or bars out; you can put anything anywhere. Interviewee 20
38. Vegetable gardening should be mandatory in school. Young and impressionable, you can teach them food doesn't come off a shelf or from a paper bag. And children should see a calf or hog being born. That's the same way I feel when I see these plants come out of the ground. People don't understand the miracle, the joy of life when you see it coming up. Interviewee 40
39. You don't have a middle class here. You have superior landowners and you have people who are paying off their refrigerator at Sears. Interviewee 28

REGARDING HUNTING

40. The problem with hunting clubs is locals expect to come on your land at any time and not pay; they think they are doing you a favor killing your deer. Interviewee 37
41. Swan hunting is big; I would hate to see it get more exclusive and commercialized. I farm some land that I lease and hunting rights are separate. Dog hunting has gotten to be an emotional thing. Dogs will take off and go anywhere; there've been some disputes. [Since] the late 70s, and hunting has boosted land values. Land has been bought for hunting, even large tracts, or leasing the rights. Road traffic is not being respectful of farmers, making sure gates are locked, driving across planted fields, etc. Interviewee 44
42. When Dad was a boy there were no deer here. Don't know why, could have been they were all eaten during the Depression or that modern grain farming feeds them while old hand farming didn't leave any waste for them to feed on. Deer being fed over the winter by outsiders coming in building homes, wanting to

attract deer to hunt, then the people leave and over the summer all the deer go back to the farmlands. So a guy trying to kill deer in winter can't see deer but then tries to plant something to make a living in Spring and suddenly has hundreds of deer. Interviewee 20

43. [Regarding hunting rights on land the farmer is leasing] I pay \$100 an acre and they pay \$1 an acre, and they feel they own it. Interviewee 44

REGARDING CHANGE AND DEVELOPMENT

44. We need to have a high level meeting and decide if we're going to plant corn or plant people. Interviewee 45
45. I love things like they were, but you can't have 'em that way, so you got to roll with the times or you get left behind. Interviewee 48
46. I would like tourism to grow, especially sightseeing, but I don't want to destroy the unique area and habitat that we possess, just for money. We're not going to be able to prevent change. Interviewee 20
47. [Duck impoundments and wetland preserves] are all well and good, but our tax dollar pays investors to build it, to work and maintain it. So we can't use this land for farmland. Then they'll turn around and sell it for millions. All in Tyrrell County. They end up paying almost nothing yet make millions when they sell. Interviewee 40
48. Do the best you can; you can't stop it. You'll make some mistakes and do some things right. Interviewee 37
49. Columbia is going to grow; in 10 years you won't be able to recognize Columbia. And I think it should grow. Even with the OLF – it's coming – make the best and figure out how to profit from it. Interviewee 34
50. When you go buying every property, big properties paying big bucks, we all pay for it in our taxes. Interviewee 48
51. County zoning – I see it as a necessary evil. Call it smart planning, maybe people will accept it. You don't want to be controlled, but you don't want to be controlled by the tourists either. Interviewee 40
52. The world's not as simple as it used to be and you can't make it that way. Interviewee 44
53. We're private people. We need protection from an OLF. Interviewee 28

54. I hope and pray the OLF doesn't go through. I understand the military needs places to train but the federal government already owns 75,000 acres in Dare County. Interviewee 40
55. I wish people weren't so divided. I wish there was more love. Interviewee 48
56. If I sell out where am I going to go to find another tract like this to do what I want to do? And where's the farmer who sells out going to go to find another 3000-acre tract of land to farm? You can't get any smaller than this [1200 acres] to have a wildlife management and be profitable. Now the Wildlife Commission won't even help unless you have 5000 acres. Interviewee 28
57. Across the U.S., everywhere you go, on the highways they're moving people out for the Food Lions and Lowes and Wal-Marts. They build these huge shopping centers on 40 acres and drive people out. I can't say if it's good or bad. It might be bad for the other little businesses but good for the consumer. There used to be six places in Columbia where you could buy shoes; now there's not a shoe store. Interviewee 48
58. Some change is good, we all need to look at some change. When people move in, you need to make yourself part of the community. Most people when they move in are too far from Wal-Mart or whatever and they want to bring it in. Then they run for a board and start trying to change things. That's a major problem. Interviewee 40
59. [Regarding land value and tax increases as development grows] There's a difference when you're making people leave. You can't tax the rich people who come in at the same rate as the people who've lived there for generations. Interviewee 47
60. No matter what you do [people are] going to get in their cars and go to Wal-Mart or the beach and go shopping. People get things cheaper at the Dollar Store and people have to watch their pennies, but it's been hard on 2 or 3 businesses. But that's what happens, it's progress. Interviewee 48
61. Help out community, try to develop properly; I'd hate to see the area [become] like Maggie Valley or Gatlinburg or Branson, Missouri. Interviewee 44
62. [Regarding youth] They are the ones you need – young people ready for a change. Talk to them; they're the future of the county. I'm the past. What do they want? To stay, to make a life here? Find out what you can do in the county because it's their futures. Interviewee 48
63. I would like to see something come in that will benefit the whole county – keep the kids here – only thing here for them now is agriculture. Interviewee 40

REGARDING TOURISM

64. There's a lot here to take advantage of and for people to see and appreciate. And people have to think with changes in mind. Interviewee 37
65. Ecotourism is as good as an industry can get. It's cleaner than factories, gives opportunities for a lot of people, gives a certain amount of pride and prestige to the natives that it's a desirable place to be. Interviewee 44
66. Maybe the family goes to the beach but half the family would rather do something else. Interviewee 45
67. If you want sustainable, paying tourism, you need [business] cards in visitor centers for guides [services]. Have retired folks as guides leading tours. Interviewee 38
68. I don't think the potential is there to overrun Tyrrell County with tourists. With wildlife viewing and nature, I think the people who come here are going to be the more educated, more respectful people. Interviewee 44
69. Non-consumptive activity out here is even more appealing to me than shooting every damn thing. Interviewee 28
70. We really need family recreation in our county. Trick is to get people coming through to stop before they hit the beach. You grab the back seat and the parents will stop. And if they don't, five miles down the road they'll have to turn around and come back! Interviewee 37
71. Bike riders, canoers, campers, they don't spend the money; they come with their water bottles and just buy gas. Interviewee 23
72. You don't have to go to Africa to see and photograph animals. People here in this county haven't even seen all that we have. Interviewee 28
73. Work it around guide services that educate their clients, take them out and describe what they're seeing and how it all fits together – the fishing industry, and farming, and how the land was formed. Not run them down the rivers for thrills on a jet ski or renting out ATVs with maniacs running up and down the roads. Interviewee 44
74. You can educate and entertain at same time but it takes time and money. Interviewee 40
75. [Regarding landowners and ecotourism] It's a money thing. Give them an opportunity to make money and they're right with you. Interviewee 37

76. Hyde and Tyrrell County desperately need [ecotourism], something to bring jobs and economic development without destroying the land. Interviewee 28
77. [Youth] don't see where your ideas are gonna benefit them; the majority are not landed. Approach it with the service part, and landowners don't have time. So it's a good match. The kids are born working; they wanna work. Interviewee 28
78. It takes somebody who really loves agriculture to stay with it. I think Tyrrell County has a lot to offer the tourist if it's done properly. Tyrrell County is a paradise of farming, fishing and hunting. Interviewee 40
79. I like [visitors]; I'm a people person, and my wife started enjoying it, too. Interviewee 34
80. I don't know that I'm interested enough in tourism to try it myself, but I don't think I'm so selfish that I'd try to prevent it if it would help someone else. I'd like to see this area prosper a little. It's nice to see some cultural things here. Interviewee 44