

F1. Business survey for recreation supplies, piers, and marinas

Fishing Supplies; Recreation Rentals and Lessons/Piers/Marinas/Fishing Charters

Hi, my name is [name]. I work for RTI International, a nonprofit research consulting firm located in Raleigh, North Carolina. We have been hired by the National Park Service to conduct an economic analysis of the proposed alternatives for managing beach driving or ORV's in the Cape Hatteras National Seashore.

A. We are calling a random sample of businesses on the Outer Banks to gather information for the economic analysis. Your business was selected for survey. Can I please speak to (insert contact name)? *(if no contact name)* We need to speak with the owner of the business or someone who is very familiar with the financial side of the business.

B. *(if no one available)* Do you know if there is a good time to call them? Can I have their name and telephone number or an email address? My name is (insert name) and my number is (insert phone number). Can you please tell them I called?

The survey should only take about 30 minutes to complete. Also, I need to make you aware that the Paperwork Reduction Act requires approval of all federal government surveys by the Office of Management and Budget. This survey has been approved under this Act. The Office of Management and Budget control number and expiration date is available at your request. Additional information about this survey and its approval is available at your request.*.

[if cannot take the survey, arrange a time to call back]

Some of the questions we ask are about current business operations. We need this information to understand the number and type of businesses currently located near the National Seashore. We will also ask some questions about your business forecast under different management proposals.

Your responses to these questions are voluntary, but we hope you will participate in the survey. This survey is the best way to get accurate information about the impacts of ORV management plans on businesses. All of your answers will be kept on a secure computer at RTI. RTI will only keep identifying information about your company until a new rule for ORV management is completed. We will not report any information about individual businesses to any other businesses or to the National Park Service unless compelled by law. Even then, if you request it, we are not required to report information that could be used to link your answers to your business.

Do you request that RTI keep your information confidential because releasing the information would cause a significant competitive disadvantage?

___ Does ___ Does not request that identifying information be protected.

C. Has the business been under the same management since 2007?

_____ Yes → Okay, let's begin.

_____ No → The survey contains some questions about 2007. If you do not have information about 2007, just tell me and we can skip those questions.

_____ Don't know → The survey contains some questions about 2007. If you do not have information about 2007, just tell me and we can skip those questions.

1. What are the main types of services you provide? [do not read list, check all that apply]

- ___ Sell fishing supplies
- ___ Sell recreational supplies, other
- ___ Rent recreational supplies
- ___ Rent household supplies (linens, high chairs, etc.)
- ___ Sell food
- ___ Sell household items, souvenirs and other items
- ___ Lessons, guided trips
- ___ Sell North Carolina fishing permits
- ___ Pier
- ___ Fishing charter
- ___ Other (specify) _____

2. What year did the business first open?

_____ (enter year)

3. Is the business open year round?

___ Yes

___ No → What months do you operate? _____ to _____

Now we have some questions about the number of employees and revenue. If you are not sure about an answer, please tell me and give me your best estimate. If you have your records handy, feel free to check your records while we are on the phone. If you want to check your records later, we can arrange a time for me to call back a confirm your responses to these questions.

4. Typically, what percent of revenue comes during each season? [interviewer: check to see that percents add to 100%]

- _____ Winter
- _____ Spring
- _____ Summer
- _____ Fall
- _____ Don't know/Refuse

5. How many full-time employees did this business employ in 2008?

_____ (enter #) OR _____ Don't know/Refuse

[if 0 full-time employees, skip to #9]

6. Did the number of full-time employees vary by season?
 Yes
 No (skip to #8)
 Don't know/Refuse (skip to #8)
7. If it varied by season, can you tell us how many full-time employees this business employed each season?
 Winter
 Spring
 Summer
 Fall
 Don't know/Refuse
8. Compared to 2007, did this business employ the same number of full- time employees, more full-time employees, or fewer full-time employees in 2008?
 More in 2008
 Same number in 2008
 Fewer in 2008
 Don't know/Refuse
9. How many part-time employees did this business employ in 2008?
_____ (enter #) OR _____ Don't know/Refuse
[if 0 part-time employees, skip to #12]
10. Did the number of part-time employees vary by season?
 Yes
 No (skip to #12)
 Don't know/Refuse (skip to #12)
11. If it varied by season, can you tell us how many part-time employees this business employed each season?
 Winter
 Spring
 Summer
 Fall
 Don't know/Refuse
12. Compared to 2007, did you have the same number of part-time employees, more part-time employees, or fewer part-time employees in 2008?
 More in 2008
 Same number in 2008
 Fewer in 2008
 Don't know/Refuse

13. For the economic analysis, we need information about the size of different businesses based on annual gross revenue. I am going to read some revenue ranges. Please tell me which range the business fit into in 2008?

- Less than \$500,000 a year
- \$500,000 to \$1 million a year
- \$1 million to \$3 million a year
- \$3 million to \$5 million a year
- \$5 million - \$10 million a year
- \$10 million - \$25 million a year
- Over \$25 million a year
- Don't know/Refuse

14. Which range did the business fit into in 2007?

- Less than \$500,000 a year
- \$500,000 to \$1 million a year
- \$1 million to \$3 million a year
- \$3 million to \$5 million a year
- \$5 million - \$10 million a year
- \$10 million - \$25 million a year
- over \$25 million a year
- Don't know/Refuse

15. (if revenue declined from 2007 to 2008) What factors do you think contributed to the decline in revenue between 2007 and 2008?

_____ (enter responses)
 Don't know/Refuse (skip to #20 intro.)

a. Of the factors you just named, which do you think are the most important?

_____ (enter responses)
 Don't know/Refuse (skip to #20 intro.)

16. (if revenue increased) What factors contributed to the increase in revenue between 2007 and 2008?

_____ (enter responses)
 Don't know/Refuse (skip to #20 intro.)

17. Of the factors you just named, which do you think are the most important?

_____ (enter responses)
 Don't know/Refuse (skip to #20 intro.)

18. (if still in the same revenue category) Did your revenue increase, decrease, or stay the same between 2007 and 2008?

- Increased
- Decreased
- Stayed the same (skip to #20 intro.)
- Don't know/Refuse (skip to #20 intro.)

19. (if increased or decreased) By how much? You can give me a range or an approximate change if you don't know the exact amount.

_____ (enter responses)
_____ Don't know/Refuse

Now I would like to ask you a few questions about the management of ORV's and beach driving at Cape Hatteras National Seashore. During the spring, summer, and fall of 2008, the National Park Service opened and closed areas of the beach to ORV's and pedestrians based on the location of endangered bird and sea turtle nests.

As you are probably aware, the Park Service is considering a number of management alternatives for driving on the beach. I am interested in how you think the options will affect your business's revenue in the future. I realize that lots of factors affect your business, and it is hard to predict the future, especially given current economic conditions. I also understand that this is a controversial subject on the island, and that people have strong feelings about the park.

In this survey, we are interested in how different management options might affect your **business** only, not your own use of the beach or other businesses. Accurate information about your business will improve our analysis of the impacts. If you don't have any idea, just tell me you don't know.

20. In 2008 and again this year, parts of the park like the points and spits (including Bodie Island Spit, Cape Point, Hatteras Islet, North Ocracoke Spit, and South Point Ocracoke) and a few other areas were closed around March 14 and then opened and closed throughout the summer based on the bird and turtle activity. One of the management alternatives under consideration would just completely close the points and spits and a few miles of beach between Ramp 27 (south of Salvo) and Buxton all year. That would leave 28 miles of beach open year round for ORV use and 40 miles closed.

- a. Compared to the situation in 2008, do you think this action would affect a significant number of your customers?
_____ Yes
_____ Maybe
_____ No (skip to #22)
_____ Don't know/Refuse (skip to #22)

- b. Compared to 2008, do you think it would increase your business, decrease your business, or not have much effect on your business if the spits and points were completely closed all year?
_____ Increase
_____ Decrease
_____ Not much effect (skip to #22)
_____ Don't know/Refuse (skip to #22)

- c. *(if increase or decrease)* Can you provide an estimate or range of estimates of the increase/decrease you might expect?

_____ (enter response)

_____ Don't know/Refuse

21. Since different businesses will be affected differently, to help me understand your answers, please explain how you came up with your answer in as much detail as possible -- for example, past experience, the type of local residents and visitors you serve, spending in different seasons, and other issues.

_____ (enter response and read back to respondent)

22. Another proposal would provide more access for ORV's and pedestrians to areas that are open, but would have been inaccessible under the 2008 management, by creating ORV and/or pedestrian corridors or allowing water taxis to some popular spots like Bodie Island Spit, about a mile of the Cape Point area, and the South Point area of Ocracoke. As in 2008, access could change week to week depending on where nesting areas are, but the proposal calls for more ORV and/or pedestrian access trails where possible. The proposal would leave about 12 miles closed all year, 26 miles open, and another 30 miles subject to restrictions during the spring and summer season.

- a. Compared to the situation in 2008, do you think this action would affect a significant number of your customers?

_____ Yes

_____ Maybe

_____ No (skip to #23)

_____ Don't know/Refuse (skip to #23)

- b. Compared to 2008, do you think it would increase your business, decrease your business, or not have much effect on your business if the spits and points were completely closed all year?

_____ Increase

_____ Decrease

_____ Not much effect (skip to #23)

_____ Don't know/Refuse (skip to #23)

- c. *(if increase or decrease)* Can you provide an estimate or range of estimates of the increase/decrease you might expect?

_____ (enter response)

_____ Don't know/Refuse

23. *[ask of businesses that rent recreational supplies, provide lessons or guided tours]* Do you use the ORV access ramps on the soundside of Cape Hatteras as part of your business?

_____ Yes

_____ No (skip to #24)

_____ Don't know/Refuse (skip to #24)

- a. If the soundside ramps were closed to ORV's, but open to pedestrians, compared to the situation in 2008, do you think this action would affect a significant number of your customers?
- _____ Yes
 _____ Maybe
 _____ No (skip to #24)
 _____ Don't know/Refuse (skip to #24)
- b. Compared to 2008, do you think it would increase your business, decrease your business, or not have much effect on your business?
- _____ Increase
 _____ Decrease
 _____ Not much effect (skip to #24)
 _____ Don't know/Refuse (skip to #24)
- c. *(if increase or decrease)* Can you provide an estimate or range of estimates of the increase/decrease you might expect?
- _____ (enter response)
 _____ Don't know/Refuse

24. If the park decided to run water taxis to transport visitors out to some areas that are open, but inaccessible to ORVs and pedestrians, would your business be interested in operating a water taxi?

- _____ Yes
 _____ Maybe
 _____ No
 _____ Don't know/Refuse

25. *(if "no" to C in the introduction)* You said that the business was under different management in 2007. Do you have the name and contact information for the previous owner?

- _____ Yes (specify) _____
 _____ No

26. Do you know why the business changed ownership? _____

27. I don't have any more questions. Is there anything that you would like to add related to the economic impacts on your business of managing ORVs?

_____ (enter response)

Thank you very much for your time. We appreciate your willingness to talk with us.

[Arrange follow-up call if necessary.]

Notes:

- if they ask for more information about the alternatives, provide the park website – www.nps.gov/caha
- if they want to talk to someone at RTI, tell them to contact Carol Mansfield, 919-541-8053 or carolm@rti.org

F2. Real estate and rental homes

Hi, my name is [name]. I work for RTI International, a nonprofit research consulting firm located in Raleigh, North Carolina. We have been hired by the National Park Service to conduct an economic analysis of the proposed alternatives for managing beach driving or ORV's in the Cape Hatteras National Seashore.

A. We are calling a random sample of businesses on the Outer Banks to gather information for the economic analysis. Your business was selected for survey. Can I please speak to (insert contact name). *(if no contact name)* We need to speak with the owner of the business or someone who is very familiar with the financial side of the business.

B. *(if no one available)* Do you know if there is a good time to call them? Can you give me their name and telephone number? My name is (insert name) and my number is (insert phone number). Can you please tell them I called?

The survey should only take about 30 minutes to complete. Also, I need to make you aware that the Paperwork Reduction Act requires approval of all federal government surveys by the Office of Management and Budget. This survey has been approved under this Act. The Office of Management and Budget control number and expiration date is available at your request. Additional information about this survey and its approval is available at your request.*
[if cannot take the survey, arrange a time to call back]

Some of the questions we ask are about current business operations. We need this information to understand the number and type of businesses currently on Cape Hatteras. We will also ask some questions about your business forecast under different management proposals.

Your responses to these questions are voluntary, but we hope you will participate in the survey. This survey is the best way to get accurate information about the impacts of ORV management plans on businesses. All of your answers will be kept on a secure computer at RTI. RTI will only keep identifying information about your company until a new rule for ORV management is completed. We will not report any information about individual businesses to any other businesses or to the National Park Service unless compelled by law. Even then, if you request it, we are not required to report information that could be used to link your answers to your business.

Do you request that RTI keep your information confidential because releasing the information would cause a significant competitive disadvantage?

Does Does not request that identifying information be protected.

C. Has the business been under the same management since 2007?

_____ Yes → Okay, let's begin.

_____ No → The survey contains some questions about 2007. If you do not have information about 2007, just tell me and we can skip those questions.

_____ Don't know → The survey contains some questions about 2007. If you do not have information about 2007, just tell me and we can skip those questions.

1. What year did this business first open?

_____ (enter year)

2. Is the business open year round? If no, when do you operate?

_____ Yes

_____ No → What months do you operate? _____ to _____

Now we have some questions about the number of employees and revenue. If you are not sure about an answer, please tell me and give me your best estimate. If you have your records handy, feel free to check your records while we are on the phone. If you want to check your records later, we can arrange a time for me to call back a confirm your responses to these questions.

3. Typically, what percent of revenue comes during each season? [interviewer: check to see that percents add to 100%]

_____ Winter

_____ Spring

_____ Summer

_____ Fall

_____ Don't know/Refuse

4. How many full-time employees did this business employ in 2008?

_____ (enter #) OR _____ Don't know/Refuse

[if 0 full-time employees, skip to #7]

5. Did the number of full-time employees vary by season?

_____ Yes

_____ No (skip to #7)

_____ Don't know/Refuse (skip to #7)

6. If it varied by season, can you tell us how many full-time employees this business employed each season?

_____ Winter

_____ Spring

_____ Summer

_____ Fall

_____ Don't know/Refuse

7. Compared to 2007, did this business employ the same number of full-time employees, more full-time employees, or fewer full-time employees in 2008?
- More in 2008
 - Same number in 2008
 - Fewer in 2008
 - Don't know/Refuse
8. How many part-time employees did this business employ have in 2008?
_____ (enter #) OR _____ Don't know/Refuse
[if 0 part-time employees, skip to #11]
9. Did the number of part-time employees vary by season?
- Yes
 - No (skip to #11)
 - Don't know/Refuse (skip to #11)
10. If it varied by season, can you tell us how many part-time employees this business employed each season?
- Winter
 - Spring
 - Summer
 - Fall
 - Don't know/Refuse
11. Compared to 2007, did you have the same number of part-time employees, more part-time employees, or fewer part-time employees in 2008?
- More in 2008
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12. For the economic analysis, we need information about the size of different businesses based on annual gross revenue. I am going to read revenue ranges. Which range did the business fit into in 2008?
- Less than \$500,000 a year
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 - \$1 million to \$3 million a year
 - \$3 million to \$5 million a year
 - \$5 million - \$10 million a year
 - \$10 million - \$25 million a year
 - Over \$25 million a year
 - Don't know/Refuse

13. Which range did the business fit into in 2007?

- Less than \$500,000 a year
- \$500,000 to \$1 million a year
- \$1 million to \$3 million a year
- \$3 million to \$5 million a year
- \$5 million - \$10 million a year
- \$10 million - \$25 million a year
- Over \$25 million a year
- Don't know/Refuse

14. (if revenue declined from 2007 to 2008) What factors do you think contributed to the decline in revenue between 2007 and 2008?

_____ (enter responses)
_____ Don't know/Refuse (skip to #19 intro.)

a. Of the factors you just named, which do you think are the most important?

_____ (enter responses)
_____ Don't know/Refuse (skip to #19 intro.)

15. (if revenue increased) What factors contributed to the increase in revenue between 2007 and 2008?

_____ (enter responses)
_____ Don't know/Refuse (skip to #19 intro.)

16. Of the factors you just named, which do you think are the most important?

_____ (enter responses)
_____ Don't know/Refuse (skip to #19 intro.)

17. (if still in the same revenue category) Did your revenue increase, decrease, or stay the same between 2007 and 2008?

- Increased
- Decreased
- Stayed the same (skip to #19 intro.)
- Don't know/Refuse (skip to #19 intro.)

18. (if increase or decrease) By how much? You can give me a range or an approximate change if you don't know the exact amount.

_____ (enter responses)
_____ Don't know/Refuse

Now I would like to ask you a few questions about the management of ORV's and beach driving at Cape Hatteras National Seashore. During the spring, summer and fall of 2008, the National Park Service opened and closed areas of the beach to ORV's and pedestrians based on the location of endangered bird and sea turtle nests.

As you are probably aware, the Park Service is considering a number of management alternatives for driving on the beach. I am interested in how you think the options will affect your business's revenue in the future. I realize that lots of factors affect your business, and it is hard to predict

the future, especially given current economic conditions. I also understand that this is a controversial subject on the island, and that people have strong feelings about the park.

In this survey, we are interested in how different management options might affect your **business** only, not your own use of the beach or other businesses. Accurate information about your business will improve our analysis of the impacts. If you don't have any idea, just tell me you don't know.

19. In 2008 and again this year, parts of the park, like the points and spits (including Bodie Island Spit, Cape Point, Hatteras Islet, North Ocracoke Spit, and South Point Ocracoke) and a few other areas were closed around March 14 and then opened and closed throughout the summer based on the bird and turtle activity. One of the management alternatives under consideration would just completely close the points and spits and a few miles of beach between Ramp 27 (south of Salvo) and Buxton all year. That would leave 28 miles of beach open year round for ORV use and 40 miles closed.

a. Compared to the situation in 2008, do you think this action would affect a significant number of your customers?

- Yes
- Maybe
- No (skip to #21)
- Don't know/Refuse (skip to #21)

b. Compared to 2008, do you think it would increase your business, decrease your business, or not have much affect on your business if the spits and points were completely closed all year?

- Increase
- Decrease
- Not much effect (skip to #21)
- Don't know/Refuse (skip to #21)

c. *(if increase or decrease)* Can you provide an estimate or range of estimates of the increase/decrease you might expect?

- (enter response)
- Don't know/Refuse

20. Since different businesses will be affected differently, to help me understand your answers please explain how you came up with your answer in as much detail as possible -- for example, past experience, the type of local residents and visitors you serve, spending in different seasons, and other issues.

(enter response and read back to respondent)

21. Another proposal would provide more access for ORV's and pedestrians to areas that are open, but would have been inaccessible under the 2008 management, by creating ORV and/or pedestrian corridors or allowing water taxis to some popular spots like Bodie Island Spit, about a mile of the Cape Point area, and the South Point area of Ocracoke. As in 2008, access could change week to week depending on where nesting areas are, but the proposal calls for more ORV and/or pedestrian access trails where

possible. The proposal would leave about 12 miles closed all year, 26 miles open, and another 30 miles subject to restrictions during the spring and summer season.

- a. Compared to the situation in 2008, do you think this action would affect a significant number of your customers?
 Yes
 Maybe
 No (skip to #22)
 Don't know/Refuse (skip to #22)
- b. Compared to 2008, do you think it would increase your business, decrease your business, or not have much effect on your business if the spits and points were completely closed all year?
 Increase
 Decrease
 Not much effect (skip to #22)
 Don't know/Refuse (skip to #22)
- c. *(if increase or decrease)* Can you provide an estimate or range of estimates of the increase/decrease you might expect?
_____ (enter response)
 Don't know/Refuse

22. If the soundside ramps were closed to ORV's but open to pedestrians, compared to the situation in 2008, do you think this action would affect a significant number of your customers?

- Yes
 Maybe
 No (skip to #23)
 Don't know/Refuse (skip to #23)
- a. Compared to 2008, do you think it would increase your business, decrease your business, or not have much effect on your business?
 Increase
 Decrease
 Not much effect (skip to #23)
 Don't know/Refuse (skip to #23)
- b. *(if increase or decrease)* Can you provide an estimate or range of estimates of the increase/decrease you might expect?
_____ (enter response)
 Don't know/Refuse

23. If the park decided to run water taxis to transport visitors out to some areas that are open but inaccessible to ORVs and pedestrians, would your business be interested in operating a water taxi??

- Yes
- Maybe
- No
- Don't know/Refuse

24. (if "no" to C in the introduction) You said that the business was under different management in 2007. Do you have the name and contact information for the previous owner?

- Yes (specify) _____
- No

25. Do you know why the business changed ownership? _____

26. I don't have any more questions. Is there anything that you would like to add related to the economic impacts on your business of managing ORVs?

_____ (enter response)

Thank you very much for your time. We appreciate your willingness to talk with us.
[Arrange follow-up call if necessary.]

Notes:

- if they ask for more information about the alternatives, provide the park website – www.nps.gov/caha
- if they want to talk to someone at RTI, tell them to contact Carol Mansfield, 919-541-8053 or carolm@rti.org

F3. Lodging except rental homes

Business survey: Lodging except rental homes

Hi, my name is [name]. I work for RTI International, a nonprofit research consulting firm located in Raleigh, North Carolina. We have been hired by the National Park Service to conduct an economic analysis of the proposed alternatives for managing beach driving or ORV's in the Cape Hatteras National Seashore.

A. We are calling a random sample of businesses on the Outer Banks to gather information for the economic analysis. Your business was selected for survey. Can I please speak to (insert contact name). *(if no contact name)* We need to speak with the owner of the business or someone who is very familiar with the financial side of the business.

B. *(if no one available)* Do you know if there is a good time to call them? Can you give me their name and telephone number? My name is (insert name) and my number is (insert phone number). Can you please tell them I called?

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[if cannot take the survey, arrange a time to call back]

Some of the questions we ask are about current business operations. We need this information to understand the number and type of businesses currently on Cape Hatteras. We will also ask some questions about your business forecast under different management proposals.

Your responses to these questions are voluntary, but we hope you will participate in the survey. This survey is the best way to get accurate information about the impacts of ORV management plans on businesses. All of your answers will be kept on a secure computer at RTI. RTI will only keep identifying information about your company until a new rule for ORV management is completed. We will not report any information about individual businesses to any other businesses or to the National Park Service unless compelled by law. Even then, if you request it, we are not required to report information that could be used to link your answers to your business.

Do you request that RTI keep your information confidential because releasing the information would cause a significant competitive disadvantage?

___ Does ___ Does not request that identifying information be protected.

C. Has the business been under the same management since 2007?

Yes → Okay, let's begin.

No → The survey contains some questions about 2007. If you do not have information about 2007, just tell me and we can skip those questions.

Don't know → The survey contains some questions about 2007. If you do not have information about 2007, just tell me and we can skip those questions.

1. What year did this [hotel/motel/B&B/cottages/campground] first open?

_____ (enter year)

2. Is the business open year round? If no, when do you operate?

Yes

No → What months do you operate? _____ to _____

Now we have some questions about the number of employees and revenue. If you are not sure about an answer, please tell me and give me your best estimate. If you have your records handy, feel free to check your records while we are on the phone. If you want to check your records later, we can arrange a time for me to call back a confirm your responses to these questions.

3. How many [*rooms, campsites*] do you have?

_____ enter number

Don't know/Refuse

4. Typically, what percent of revenue comes during each season? [interviewer: check to see that percents add to 100%]

_____ Winter

_____ Spring

_____ Summer

_____ Fall

_____ Don't know/Refuse

5. How many full-time employees did this business employ in 2008?

_____ (enter #) OR _____ Don't know/refuse

[if 0 full-time employees, skip to #8]

6. Did the number of full-time employees vary by season?

_____ Yes

_____ No (skip to #8)

_____ Don't know/refuse (skip to #8)

7. If it varied by season, can you tell us how many full-time employees this business employed each season?

_____ Winter

_____ Spring

_____ Summer

_____ Fall

_____ Don't know/Refuse

8. Compared to 2007, did this business employ the same number of full-time employees, more full-time employees, or fewer full-time employees in 2008?

- More in 2008
- Same number in 2008
- Fewer in 2008
- Don't know/Refuse

9. How many part-time employees did this business employ in 2008?

(enter #) OR Don't know/refuse
[if 0, skip to #12]

10. Did the number of part-time employees vary by season?

- Yes
- No (skip to #12)
- Don't know/Refuse (skip to #12)

11. If it varied by season, can you tell us how many part-time employees this business employed each season?

- Winter
- Spring
- Summer
- Fall
- Don't know/Refuse

12. Compared to 2007, did you have the same number of part-time employees, more part-time employees, or fewer part-time employees in 2008?

- More in 2008
- Same number in 2008
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- Don't know/Refuse

13. For the economic analysis, we need information about the size of different businesses based on annual gross revenue. I am going to read revenue ranges. Which range did the business fit into in 2008?

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- Over \$25 million a year
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14. Which range did the business fit into in 2007?

- Less than \$500,000 a year
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- \$5 million - \$10 million a year
- \$10 million - \$25 million a year
- Over \$25 million a year
- Don't know/Refuse

15. (if revenue declined from 2007 to 2008) What factors do you think contributed to the decline in revenue between 2007 and 2008?

_____ (enter responses)
_____ Don't know/Refuse (skip to #20 intro.)

a. Of the factors you just named, which do you think are the most important?

_____ (enter responses)
_____ Don't know/Refuse (skip to #20 intro.)

16. (if revenue increased) What factors contributed to the increase in revenue between 2007 and 2008?

_____ (enter responses)
_____ Don't know/Refuse (skip to #20 intro.)

17. Of the factors you just named, which do you think are the most important?

_____ (enter responses)
_____ Don't know/Refuse (skip to #20 intro.)

18. (if still in the same revenue category) Did your revenue increase, decrease, or stay the same between 2007 and 2008?

- Increased
- Decreased
- Stayed the same (skip to #20 intro.)
- Don't know/Refuse (skip to #20 intro.)

19. (if increased or decreased) By how much? You can give me a range or an approximate change if you don't know the exact amount.

_____ (enter responses)
_____ Don't know/Refuse

Now I would like to ask you a few questions about the management of ORV's and beach driving at Cape Hatteras National Seashore. During the spring, summer and fall of 2008, the National Park Service opened and closed areas of the beach to ORV's and pedestrians based on the location of endangered bird and sea turtle nests.

As you are probably aware, the Park Service is considering a number of management alternatives for driving on the beach. I am interested in how you think the options will affect your business's revenue in the future. I realize that lots of factors affect your business, and it is hard to predict

the future, especially given current economic conditions. I also understand that this is a controversial subject on the island, and that people have strong feelings about the park.

In this survey, we are interested in how different management options might affect your **business** only, not your own use of the beach or other businesses. Accurate information about your business will improve our analysis of the impacts. If you don't have any idea, just tell me you don't know.

20. In 2008 and again this year, parts of the park, like the points and spits (including Bodie Island Spit, Cape Point, Hatteras Islet, North Ocracoke Spit, and South Point Ocracoke) and a few other areas were closed around March 14 and then opened and closed throughout the summer based on the bird and turtle activity. One of the management alternatives under consideration would just completely close the points and spits and a few miles of beach between Ramp 27 (south of Salvo) and Buxton all year. That would leave 28 miles of beach open year round for ORV use and 40 miles closed.

- a. Compared to the situation in 2008, do you think this action would affect a significant number of your customers?
 - Yes
 - Maybe
 - No (skip to #22)
 - Don't know/Refuse (skip to #22)

- b. Compared to 2008, do you think it would increase your business, decrease your business, or not have much effect on your business if the spits and points were completely closed all year?
 - Increase
 - Decrease
 - Not much effect (skip to #22)
 - Don't know/Refuse (skip to #22)

- c. *(if increase or decrease)* Can you provide an estimate or range of estimates of the increase/decrease you might expect?
 - _____ (enter response)
 - Don't know/Refuse

21. Since different businesses will be affected differently, to help me understand your answers, please explain how you came up with your answer in as much detail as possible -- for example past experience, the type of local residents and visitors you serve, spending in different seasons, and other issues.

_____ (enter response and read back to respondent)

22. Another proposal would provide more access for ORV's and pedestrians to areas that are open, but would have been inaccessible under the 2008 management by creating ORV and/or pedestrian corridors or allowing water taxis to some popular spots like Bodie Island Spit, about a mile of the Cape Point area, and the South Point area of Ocracoke. As in 2008, access could change week to week depending on where nesting areas are, but the proposal calls for more ORV and/or pedestrian access trails where possible. The proposal

would leave about 12 miles closed all year, 26 miles open, and another 30 miles subject to restrictions during the spring and summer season.

- a. Compared to the situation in 2008, do you think this action would affect a significant number of your customers?
 Yes
 Maybe
 No (skip to #23)
 Don't know/Refuse (skip to #23)
- b. Compared to 2008, do you think it would increase your business, decrease your business or not have much effect on your business if the spits and points were completely closed all year?
 Increase
 Decrease
 Not much effect (skip to #23)
 Don't know/Refuse (skip to #23)
- c. *(if increase or decrease)* Can you provide an estimate or range of estimates of the increase/decrease you might expect?
_____ (enter response)
 Don't know/Refuse

23. If the soundside ramps were closed to ORV's but open to pedestrians, compared to the situation in 2008, do you think this action would affect a significant number of your customers?

- Yes
 Maybe
 No (skip to #24)
 Don't know/Refuse (skip to #24)
- a. Compared to 2008, do you think it would increase your business, decrease your business or not have much effect on your business?
 Increase
 Decrease
 Not much effect (skip to #24)
 Don't know/Refuse (skip to #24)
- b. *(if increase or decrease)* Can you provide an estimate or range of estimates of the increase/decrease you might expect?
_____ (enter response)
 Don't know/Refuse

24. If the park decided to run water taxis to transport visitors out to some areas that are open but inaccessible to ORVs and pedestrians, would your business be interested in operating a water taxi?

- Yes
- Maybe
- No
- Don't know/Refuse

25. (if "no" to C in the introduction) You said that the business was under different management in 2007. Do you have the name and contact information for the previous owner?

- Yes (specify) _____
- No

26. Do you know why the business changed ownership? _____

27. I don't have any more questions. Is there anything that you would like to add related to the economic impacts on your business of managing ORVs?

_____ (enter response)

Thank you very much for your time. We appreciate your willingness to talk with us.
[Arrange follow-up call if necessary.]

Notes:

- if they ask for more information about the alternatives, provide the park website – www.nps.gov/caha
- if they want to talk to someone at RTI, tell them to contact Carol Mansfield, 919-541-8053 or carolm@rti.org

F4. Commercial fishermen

Business survey: Commercial fishermen

Hi, my name is [name]. I work for RTI International, a nonprofit research consulting firm located in Raleigh, North Carolina. We have been hired by the National Park Service to conduct an economic analysis of the proposed alternatives for managing beach driving or ORV's in the Cape Hatteras National Seashore.

We are calling a random sample of businesses on the Outer Banks to gather information for the economic analysis. Commercial fishermen are included in the sample. [Insert name of fisherman] has been selected for survey. Can I please speak to (insert contact name).

(if not available) Can we set up a time when I can call back? My name is (insert name) and my number is (insert phone number). Can you please tell them I called?

The survey should only take about 30 minutes to complete. Also, I need to make you aware that the Paperwork Reduction Act requires approval of all federal government surveys by the Office of Management and Budget. This survey has been approved under this Act. The Office of Management and Budget control number and expiration date is available at your request. Additional information about this survey and its approval is available at your request.*

[if cannot take the survey, arrange a time to call back]

Some of the questions we ask are about current conditions. We will also ask some questions about your business forecast under different park management proposals.

Your responses to these questions are voluntary, but we hope you will participate in the survey. This survey is the best way to get accurate information about the impacts of ORV management plans on businesses. All of your answers will be kept on a secure computer at RTI. RTI will only keep identifying information about your company until a new rule for ORV management is completed. We will not report any information about individual businesses to any other businesses or to the National Park Service unless compelled by law. Even then, if you request it, we are not required to report information that could be used to link your answers to your business.

Do you request that RTI keep your information confidential because releasing the information would cause a significant competitive disadvantage?

___ Does ___ Does not request that identifying information be protected.

Okay, let's begin.

1. How long have you been a commercial fisherman?
_____ (enter response)

2. Have you fished or do you plan to fish for commercial purposes in Cape Hatteras National Seashore in 2009?
 Yes, I have
 Yes, I plan to, but I haven't yet
 No
 Don't know/Refuse

3. Did you fish for commercial purposes in Cape Hatteras National Seashore in 2008?
 Yes
 No

4. *[if no to #2 and #3]* Do you plan to fish for commercial purposes in Cape Hatteras National Seashore in the future?
 Yes
 Maybe
 No → skip to #24 (terminate interview)

5. How many years have you been fishing commercially in Cape Hatteras National Seashore?
 _____ (enter response)

6. Where in the National Seashore do you fish? [check all that apply]
 Area north of Oregon Islet and ramp 4
 Oregon Islet point (south of ramp 4)
 Between Rodanthe and Buxton
 Bay side of Cape Hatteras north of Cape Hatteras Lighthouse
 Bay side of Cape Hatteras south of Cape Hatteras Lighthouse
 Cape Point area
 South Beach to ramp 55
 Hatteras Islet
 North Ocracoke Islet
 Ocracoke between ramp 59 south and ramp 72
 Ramp 72 to South Point

Now we have some questions about the fishing effort and your revenue. If you are not sure about an answer, please tell me and give me your best estimate. If you have your records handy, feel free to check your records while we are on the phone. If you want to check your records later, we can arrange a time for me to call back a confirm your responses to these questions.

7. What fraction of your fishing time is spent in the National Seashore versus outside the Seashore?
 _____ (enter response for inside the National Seashore)
 Don't know/Refuse

8. What fraction of your yearly total household income from all sources comes from fish caught in the National Seashore?
 _____ (enter response for inside the National Seashore)
 _____ Don't know/Refuse
9. Do you fish from a boat, or from the shore, or both? (check only one)
 _____ Boat _____ Shore _____ Both boat and shore
10. Where do you sell your catch?
 _____(enter response)
11. How does recreational fishing on Cape Hatteras National Seashore beaches impact your fishing?
 _____(enter response) OR _____ No impact
12. For the economic analysis, we need information about the size of different businesses based on annual gross revenue. I am going to read revenue ranges. Which range did you fit in for 2008?
 ___ Less than \$500,000 a year
 ___ \$500,000 to \$1 million a year
 ___ \$1 million to \$3 million a year
 ___ \$3 million to \$5 million a year
 ___ \$5 million - \$10 million a year
 ___ \$10 million - \$25 million a year
 ___ Over \$25 million a year
 ___ Don't know/Refuse
13. Which range did fit into in 2007?
 ___ Less than \$500,000 a year
 ___ \$500,000 to \$1 million a year
 ___ \$1 million to \$3 million a year
 ___ \$3 million to \$5 million a year
 ___ \$5 million - \$10 million a year
 ___ \$10 million - \$25 million a year
 ___ Over \$25 million a year
 ___ Don't know/Refuse
14. (*if revenue declined from 2007 to 2008*) What factors contributed to the decline in revenue in 2008?
 _____ (enter responses)
 _____ Don't know/Refuse (skip to #19 intro.)
- a. Of the factors you just named, which do you think are the most important?
 _____ (enter responses)
 _____ Don't know/Refuse (skip to #19 intro.)

15. *(if revenue increased)* What factors contributed to the increase in revenue between 2007 and 2008?

_____ (enter responses)

_____ Don't know/Refuse (skip to #19 intro.)

16. Of the factors you just named, which do you think are the most important?

_____ (enter responses)

_____ Don't know/Refuse (skip to #19 intro.)

17. *(if still in the same revenue category)* Did your revenue increase, decrease, or stay the same between 2007 and 2008?

_____ Increased

_____ Decreased

_____ Stayed the same (skip to #19 intro.)

_____ Don't know/Refuse (skip to #19 intro.)

18. *(if increased or decreased)* By how much? You can give me a range or an approximate change if you don't know the exact amount.

_____ (enter responses)

_____ Don't know/Refuse

Now I would like to ask you a few questions about the management of ORV's and beach driving at Cape Hatteras National Seashore. During the spring, summer, and fall of 2008, the National Park Service opened and closed areas of the beach to ORV's and pedestrians based on the location of endangered bird and sea turtle nests.

As you are probably aware, the Park Service is considering a number of management alternatives for driving on the beach. I am interested in how you think the options will affect your business's revenue in the future. I realize that lots of factors affect your business, and it is hard to predict the future, especially given current economic conditions. I also understand that this is a controversial subject on the island, and that people have strong feelings about the park.

In this survey, we are interested in how different management options might affect your **business** only, not your own use of the beach or other businesses. Accurate information about your business will improve our analysis of the impacts. If you don't have any idea, just tell me you don't know.

19. In 2008 and again this year, parts of the park like the points and spits (including Bodie Island Spit, Cape Point, Hatteras Islet, North Ocracoke Spit, and South Point Ocracoke) and a few other areas were closed around March 14 and then opened and closed throughout the summer based on the bird and turtle activity. One of the management alternatives under consideration would just completely close the points and spits and a few miles of beach between Ramp 27 (south of Salvo) and Buxton all year. That would leave 28 miles of beach open year round for ORV use and 40 miles closed.

- a. Compared to the situation in 2008, do you think this action would affect your commercial fishing activity?
- Yes
 Maybe
 No (skip to #21)
 Don't know/Refuse (skip to #21)
- b. Compared to 2008, do you think it would increase your business, decrease your business, or not have much effect on your business if the spits and points were completely closed all year?
- Increase
 Decrease
 Not much effect (skip to #21)
 Don't know/Refuse (skip to #21)
- c. *(if increase or decrease)* Can you provide an estimate or range of estimates of the increase/decrease you might expect?
- _____ (enter response)
 Don't know/Refuse

20. Since different businesses will be affected differently, to help me understand your answers please explain how you came up with your answer in as much detail as possible -- for example, past experience and other issues.

_____ (enter response and read back to respondent)

21. Another proposal would provide more access for ORV's and pedestrians to areas that are open, but would have been inaccessible under the 2008 management by creating ORV and/or pedestrian corridors or allowing water taxis to some popular spots like Bodie Island Spit, about a mile of the Cape Point area, and the South Point area of Ocracoke. As in 2008, access could change week to week depending on where nesting areas are, but the proposal calls for more ORV and/or pedestrian access trails where possible. The proposal would leave about 12 miles closed all year, 26 miles open, and another 30 miles subject to restrictions during the spring and summer season.

- a. Compared to the situation in 2008, do you think this action would affect your commercial fishing activity?
- Yes
 Maybe
 No (skip to #22)
 Don't know/Refuse (skip to #22)

- b. Compared to 2008, do you think it would increase your business, decrease your business or not have much effect on your business if the spits and points were completely closed all year?
- Increase
 - Decrease
 - Not much effect (skip to #22)
 - Don't know/Refuse (skip to #22)

- c. (if increase or decrease) Can you provide an estimate or range of estimates of the increase/decrease you might expect?
- _____ (enter responses)
- Don't know/Refuse

22. If the soundside ramps were closed to ORV's but open to pedestrians, compared to the situation in 2008, do you think this action would affect your commercial fishing activity?
- Yes
 - Maybe
 - No (skip to #23)
 - Don't know/Refuse (skip to #23)

- a. Compared to 2008, do you think it would increase your business, decrease your business, or not have much effect on your business?
- Increase
 - Decrease
 - Not much effect (skip to #24)
 - Don't know/Refuse (skip to #24)

- b. (if increase or decrease) Can you provide an estimate or range of estimates of the increase/decrease you might expect?
- _____ (enter response)
- Don't know/Refuse

23. If the park decided to run water taxis to transport visitors out to some areas that are open but inaccessible to ORVs and pedestrians, would you be interested in operating a water taxi?
- Yes
 - Maybe
 - No
 - Don't know/Refuse

24. I don't have any more questions. Is there anything that you would like to add related to the economic impacts on your business of managing ORVs?
- _____ (enter response)

Thank you very much for your time. We appreciate your willingness to talk with us.

[Arrange follow-up call if necessary.]

Notes:

- if they ask for more information about the alternatives, provide the park website – www.nps.gov/caha
- if they want to talk to someone at RTI, tell them to contact Carol Mansfield, 919-541-8053 or carolm@rti.org

F6. Initial letter to business owners

Dear Business Owner,

RTI International, an independent, nonprofit research consulting firm located in Raleigh, North Carolina, has been hired by the National Park Service to conduct an economic analysis of the proposed alternatives for managing beach driving or ORV's in the Cape Hatteras National Seashore. We will be calling a random sample of businesses on the Outer Banks to gather information for the economic analysis. Your business was selected for survey.

Someone from RTI will be calling your business in the next few days to ask some questions about your business. We need information on the size and activities of your business, including revenue and number of employees in 2007 and 2008, to understand the number and type of businesses currently on Cape Hatteras. It may be helpful to consult your records before we call. We will also ask some questions about your business forecast under different ORV management proposals.

Our questions about revenue only ask which category your business fell into in 2007 and 2008 from the following categories:

- Less than \$500,000 a year
- \$500,000 to \$1 million a year
- \$1 million to \$3 million a year
- \$3 million to \$5 million a year
- \$5 million - \$10 million a year
- \$10 million - \$25 million a year
- Over \$25 million a year

Your responses to these questions are voluntary, but we hope you will participate in the survey because this is the best way to get accurate information about the possible impacts of ORV management on businesses. All of your answers will be kept on a secure computer at RTI. We will not report any information about individual businesses to any other businesses or to the National Park Service unless compelled by law. Even then, if you request it, we are not required to report information that could be used to link your answers to your business. We will explain the procedure for confidentiality again when we call.

If you would like to schedule a time for your interview please contact Ross Loomis from RTI at 919-541-6930 or rloomis@rti.org. Otherwise, we will be calling you in the next few days.

If you have any questions about the survey please contact Carol Mansfield at RTI (carolm@rti.org or 919-541-8053) or Cyndy Holda at Cape Hatteras National Seashore (cyndy_holda@nps.gov or 252-473-2111, ext. 148).

Thank you very much for your cooperation.

Carol Mansfield
Senior Economist, RTI International