

2018 North Carolina Regional Visitor Profile

A publication of Visit North Carolina
A Unit of the Economic Development Partnership of North Carolina



2018 North Carolina Regional Visitor Profile

Visit North Carolina contracts with the research company OmniTrak Group, Inc. for data on North Carolina visitors through its TravelTrakAmerica product. TravelTrakAmerica is a continuation of TNS' TravelsAmerica which began in 2005, and through which North Carolina has received visitor profile data since that time.

The TravelTrakAmerica product is based upon a nationally representative sample from the LightSpeed Research USA Panel of over 1,000,000 households. Each month, TravelTrakAmerica research program conducts over 10,000 Internet-based interviews among past 12-month travelers who have traveled more than 50 miles from their homes (excluding commuters). From this sample, data from 4,500 – 5,500 past month travelers are also collected for even greater insights. Information collected includes purpose of trip, mode of travel, travel party characteristics, places visited, number of nights, accommodations, activities, spending, and demographics. Data collected are weighted to match US Census variables, market size, age of household head, household income, and household size. The research staff of Visit North Carolina created the following report based on this data from TravelTrakAmerica.

The purpose of this regional report is to provide each region with research data specific to their geographic area. The report is divided into four sections: Coast, Piedmont, Mountain and a comparison section. At the end of the report, an appendix offers definitions of key travel terms.

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Table of Contents

	Page
Coastal Region Summary	4
<i>Coastal Overnight Visitors</i>	5
Piedmont Region Summary	14
<i>Piedmont Overnight Visitors</i>	15
Mountain Region Summary	24
<i>Mountain Overnight Visitors</i>	25
Regional Comparison	34
Glossary of Terms	44

2018 Domestic Coastal Region Travel Summary

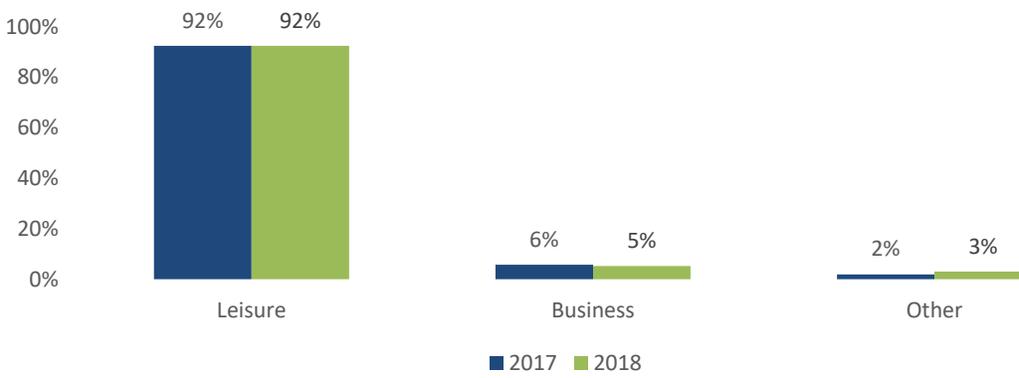
- ◆ In 2018, 23 percent of North Carolina visitors traveled to North Carolina’s Coastal Region, approximately 11.8 million person-trips (approximately 10.6 million overnight person-trips). For marketing purposes, the Coastal Region is made up of twenty-eight most eastern counties of North Carolina. *Note that the regional volume totals do not sum to the statewide volume total, as some visitors travel to multiple geographic regions in one visit.
- ◆ Eighty-nine percent of all domestic visitors (and 92 percent of overnights) came to the Coastal Region for pleasure purposes, while six percent of visitors (5 percent of overnights) came to conduct business (includes meeting/convention).
- ◆ Summer (June - August) was the most popular season for travel to North Carolina’s Coastal Region, with nearly thirty-nine percent of all 2018 coastal visitors and forty percent of overnights. Spring (March-May) and fall (September - November) followed with twenty-six percent and twenty percent of coastal visitors (26 percent and 19 percent of overnights, respectively). The winter season (December-February) was the least visited with sixteen percent (15 percent of overnights).
- ◆ Overnight visitors to the Coastal Region spent an average of 4.5 nights in the region in 2018.
- ◆ Thirty-three percent of Coastal Region visitors lodged at a hotel/motel while twenty-eight percent stayed in a private home. Eighteen percent stayed in a rental home and seven percent stayed in a rental condo. Six percent stayed in a personal second home or condo. Approximately five percent of coastal overnights indicated that they lodged in a shared-economy property such as AirBnB or VRBO.
- ◆ The average travel party size for all Coastal Region visitors was 2.4 people. Forty-two percent of travel parties to the region included children in the party in 2018.
- ◆ Ninety-three percent of overnight travelers to the Coastal Region drove (includes personal automobile, rental, motorcycle and RV), while four percent traveled by air.
- ◆ In 2018, the average household trip expenditure in the Coastal Region was \$1,073. The average household trip expenditure for overnight visitors to the Coastal Region was \$1,240. Daytrip parties to the Coastal Region spent approximately \$219 per visit.
- ◆ The top states of origin of *overnight* visitors to the Coastal Region were North Carolina (36%), Virginia (14%), Pennsylvania (8%), Ohio (5%), Tennessee (5%), Maryland (4%), New Jersey (3%), New York (3%) and South Carolina (3%).
- ◆ Fifty-three percent of all households (56 percent of overnight) that traveled to North Carolina’s Coastal Region in 2018 had a household income over \$75,000.
- ◆ In 2018, Raleigh/Durham (16%) was the top advertising market of origin for *overnight* travelers to the Coastal Region, followed by Charlotte (9%), Greensboro/High Point/Winston Salem (7%), Washington DC (6%), Richmond-Petersburg (6%) and Norfolk-Portsmouth-Newport News (5%).

Coastal Region Overnight Visitor Profile

Main Purpose of Visit

In 2018, ninety-two percent of domestic overnight visitors came to the Coastal Region for leisure purposes, which included visiting friends and relatives, outdoor recreation and entertainment/sightseeing. This was down from ninety-six percent in 2016. Approximately five percent of domestic overnight visitors came for general business, convention, seminar or other group meeting, while two percent traveled to the Coastal Region for other purposes.

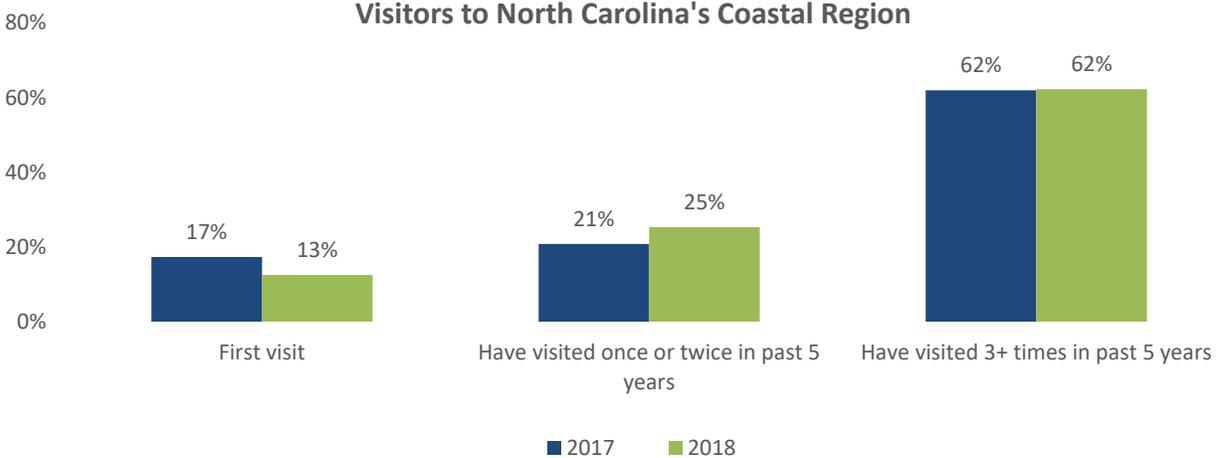
2018 Primary Purpose of Overnight Trip to North Carolina's Coastal Region



First Time Visitors

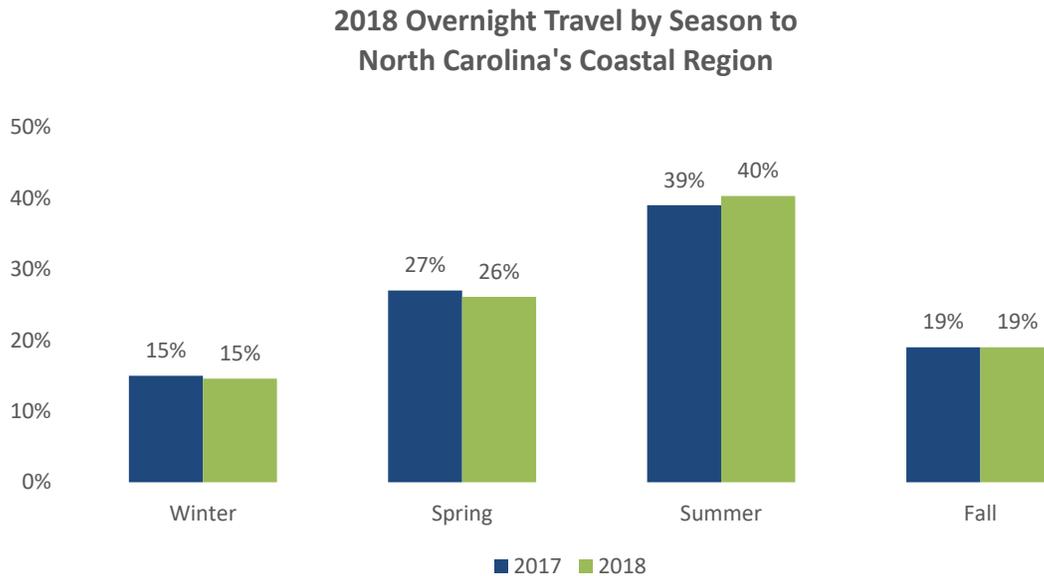
Thirteen percent of overnight visitors to the Coastal Region were first time visitors in 2018, down from seventeen percent in 2017. The majority of overnight coastal visitors are still repeat, and frequent, visitors.

2018 First Time vs. Repeat Visitors to North Carolina's Coastal Region



Travel Volume by Season

When examining visitation based on the typical seasonal schedule, the summer (June through August), with forty percent of the region’s annual visitors, remains the most popular season of the year for overnight travel to North Carolina’s Coastal Region. In 2018, seasonal visitation was very similar to 2017 patterns.



Average Length of Stay

In 2018, an average of 4.5 nights was spent by visitors to North Carolina’s Coastal Region. Data indicates that out-of-state visitors stay an average of 5.5 nights, while in-state visitors stay an average of 2.9 nights.

Travel Party Size

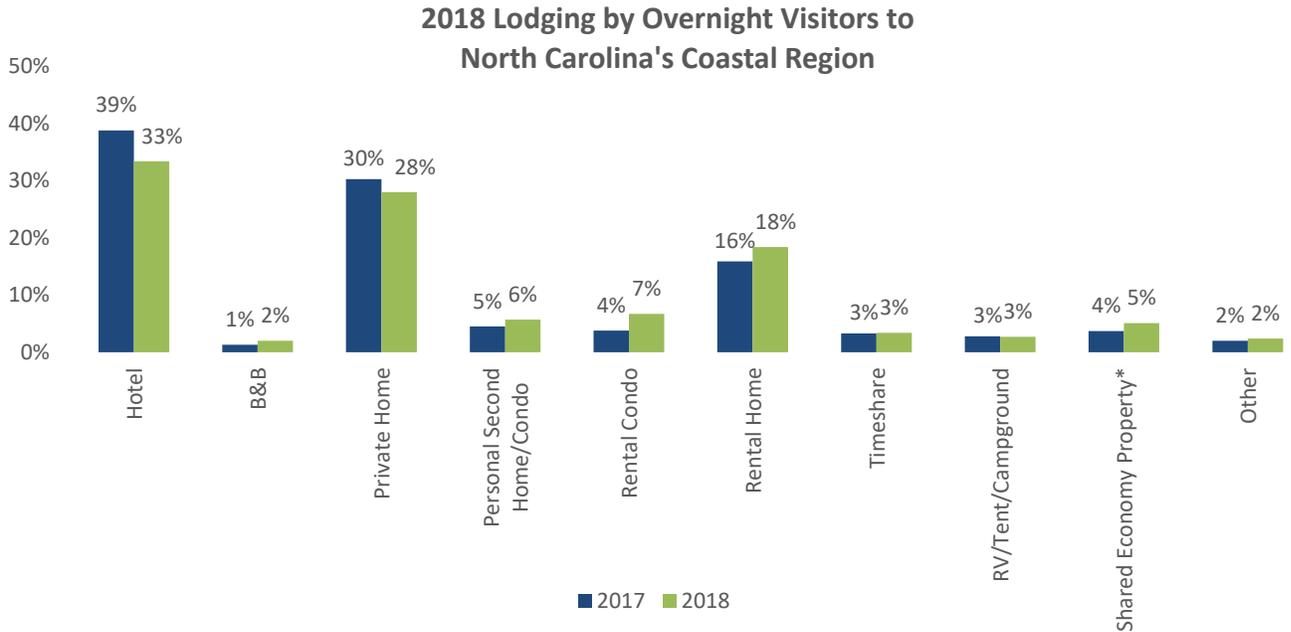
The average travel party size for all Coastal Region overnight visitors was 2.5 people.

Children on Trip

Forty-four percent of overnight visitor parties to the Coastal Region included children, up from thirty-four percent in 2017. Among those who traveled with children, the average number of children on trips was 1.9 children.

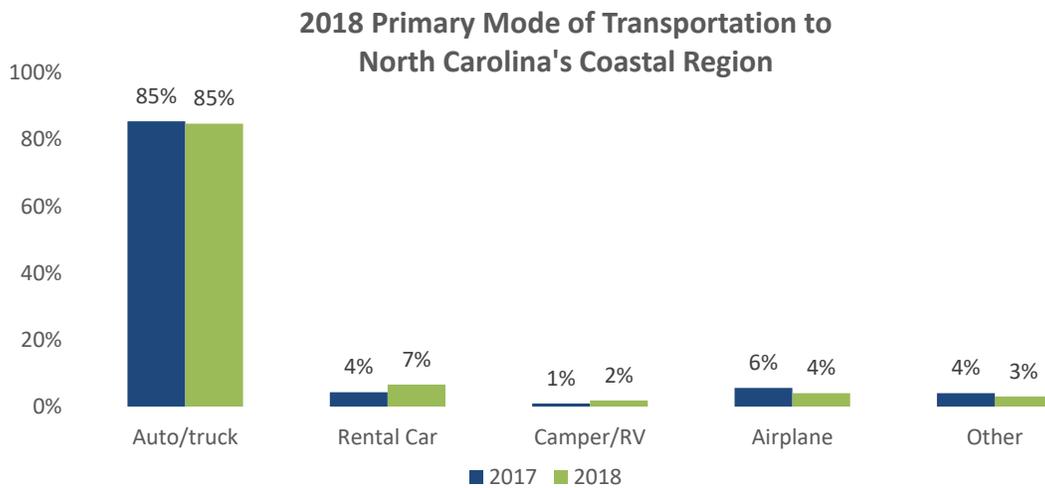
Lodging Used in Coastal Region

In 2018, one-third percent of Coastal Region overnight visitors lodged at a hotel/motel, down from thirty-nine percent in 2017. Twenty-eight percent of the region’s visitors stayed in a private home, and eighteen percent stayed in a rental home. Data reflected that approximately five percent of Coastal Region visitors chose to use some type of shared economy lodging, such as Airbnb or VRBO. It should be noted that some visitors use more than one type of accommodation during a visit, so totals equal more than 100%.



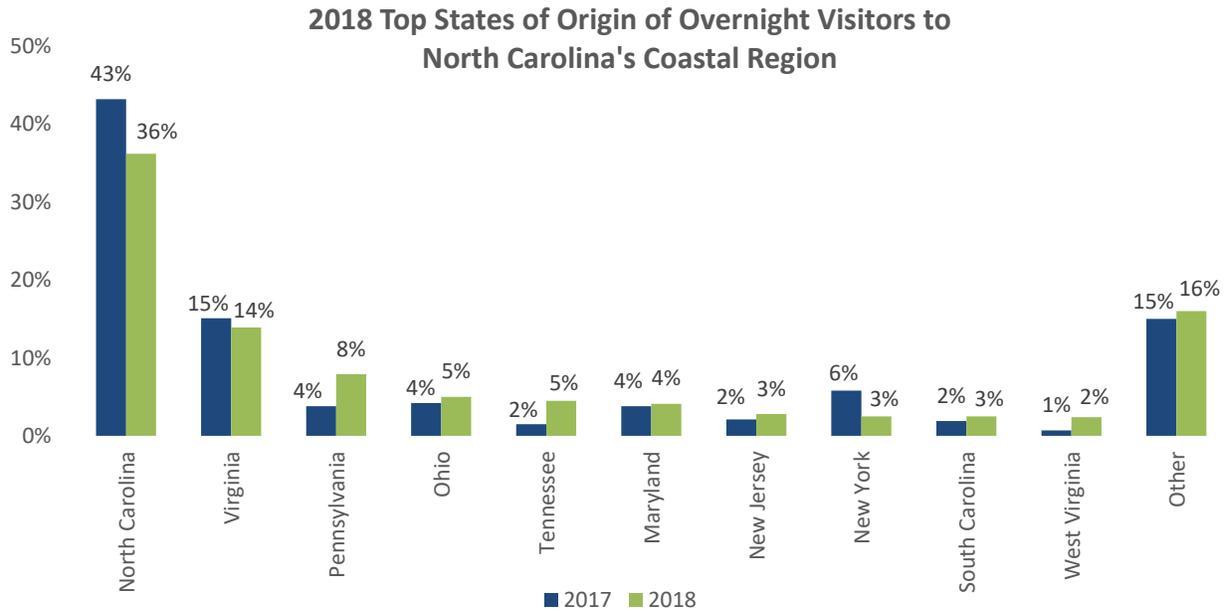
Mode of Transportation

In 2018, the personal auto was by far the dominant form of transportation (85%) for overnight visitors to the Coastal Region, while four percent traveled by air.



Origin of Visitors

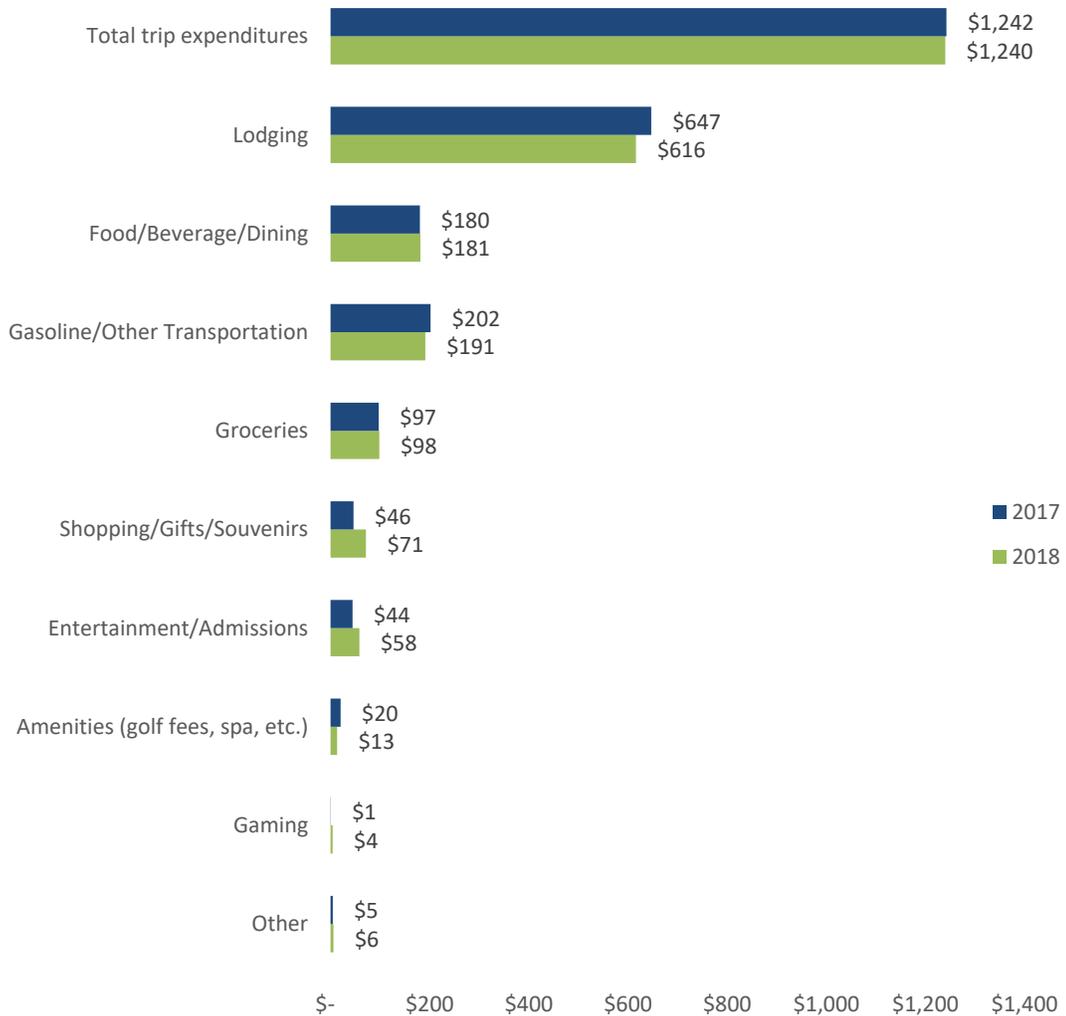
In 2018, the top states of origin for Coastal Region overnight visitors included North Carolina (36%), Virginia (14%), New York (6%), Pennsylvania (8%), Ohio (5%), Maryland (4%), New Jersey (3%) and New York (3%). The proportion of in-state visitors decreased from forty-three percent in 2017 to thirty-six percent in 2018. The proportion of visitors from Pennsylvania, Ohio, Tennessee and New Jersey all increased from 2017 to 2018.



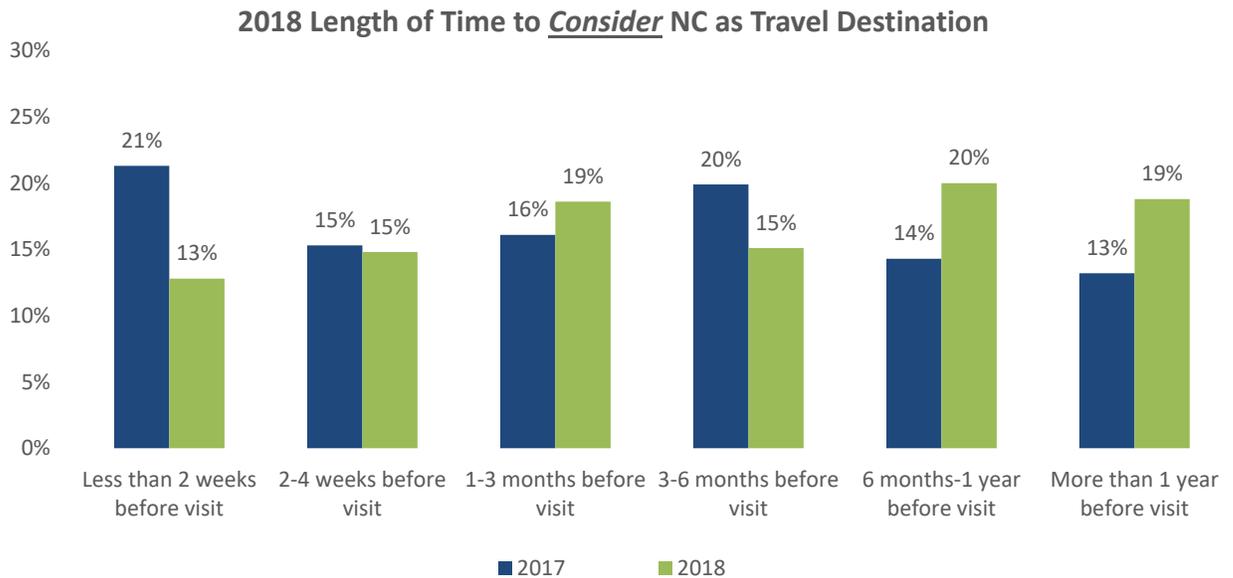
Amount Spent in Coastal Region

The average overnight visitor party spending per trip in the Coastal Region was flat from 2017 to 2018.

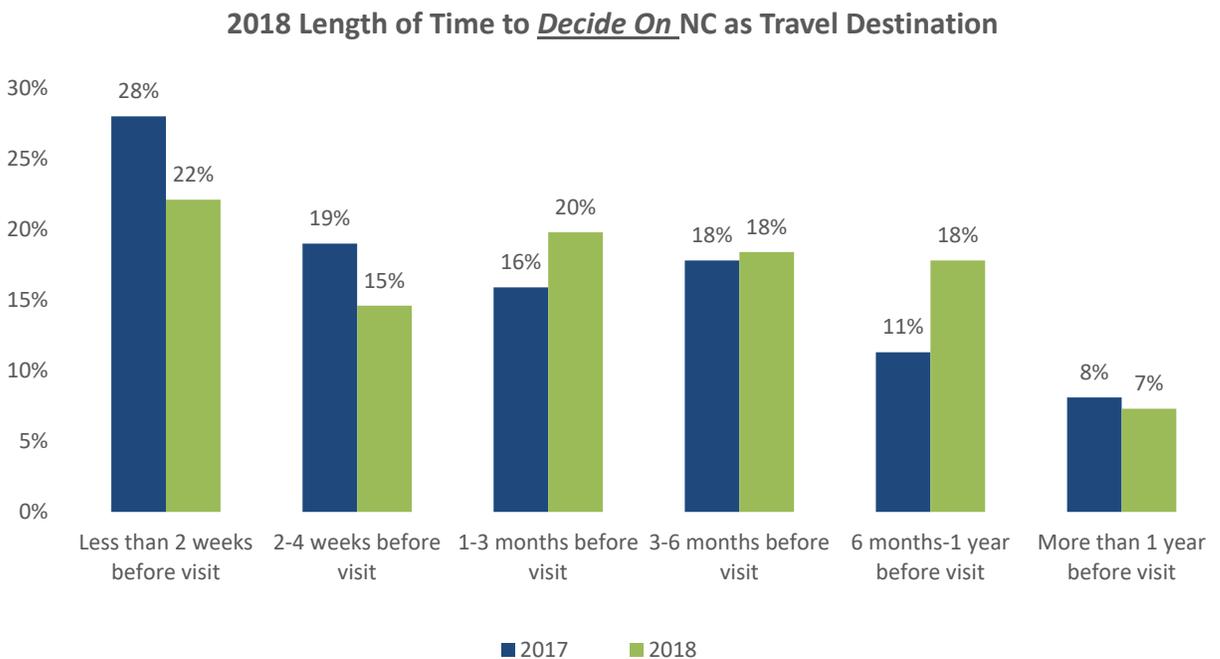
Average Trip Spending by Overnight Visitor Parties to North Carolina's Coastal Region



Travel Planning to Coastal Region



Coastal Region visitors typically consider and decide their vacation plans farther in advance than North Carolina visitors in general. In 2018, the timeframe for consideration of the Coastal Region was longer than in 2017. More than a third of Coastal Region visitors considered the state at least six months ahead of travel and twenty-five percent of them decided to visit at least six months ahead of travel. The proportion of the region’s overnight visitors who decided on the travel destination one month or less prior to travel decreased from forty-seven percent in 2017 to thirty-seven percent in 2018.



Activities

The following table provides information on activities participated in by coastal visitors in 2018. These are not indicative of purpose of trip, but what activities visitors participate in while in North Carolina. More than two-thirds of the overnight visitors to the region went to a beach and more than one-third shopped while visiting the coast. Other popular activities included visiting relatives (22%), fine dining (21%), visiting historic sites/churches (17%), fishing (16%), visiting friends (15%) and rural sightseeing (13%). ***Note that responses to this question are not mutually exclusive and percentages do not equal 100%. Therefore, proportions should not be aggregated to combine categories of activities. Also note that these activities do not imply purpose of trip.**

Activities Participated in by Overnight Visitors to North Carolina’s Coastal Region

Activity	2017	2018
Beach	57.3%	67.9%
Shopping	34.4%	33.5%
Visiting Relatives	29.2%	21.6%
Fine Dining	15.2%	21.4%
Historic Sites/Churches	18.2%	17.2%
Fishing (fresh or saltwater)	11.4%	16.4%
Visiting Friends	11.9%	14.6%
Rural Sightseeing	16.1%	12.8%
State Park/Monument/Recreation area	15.3%	12.4%
Wildlife Viewing	11.7%	10.7%
Museums	15.9%	10.3%
Zoos/Aquariums/Aviaries	8.2%	10.2%
Craft Breweries	5.3%	9.0%
Biking/Road Biking/Cycling	4.7%	9.0%
Urban Sightseeing	10.9%	8.9%
National Park/Monument/Recreation area	8.6%	7.9%
Golf	4.7%	6.1%
Bird Watching	3.1%	5.8%
Old Homes/Mansions	3.3%	5.7%
Gardens	3.0%	5.5%
Hiking/Backpacking	2.9%	4.8%
Art Galleries	2.9%	4.6%
Wine Tasting/Winery Tour	4.3%	4.4%
Rafting/Kayaking/Canoeing	3.5%	3.8%
Local/folk arts/crafts	3.7%	3.7%
Nightclubs/Dancing	4.8%	3.3%
Nature Travel/Eco-touring	5.0%	3.3%
Theme Park/Amusement Park/Water Park	1.6%	3.2%
ATV/Fourwheeling	0.9%	3.2%
Musical performance/show	1.7%	3.1%
Spa/health club	0.8%	2.9%
Motor boat/jet ski	3.1%	2.7%
Special Events/Festivals	1.7%	2.4%
Other nature (photography, rockhounding, etc.)	3.2%	2.3%
Youth/Amateur/Collegiate/Sporting Event Participant	0.1%	2.2%
Horseback Riding	1.1%	1.9%

Demographic Profile of North Carolina Coastal Region Overnight Visitors

Two-thirds (66.5%) of North Carolina Coastal Region overnight visitors are married and twenty-three percent of the region’s visitors have never been married. Eleven percent are divorced, widowed or separated.

The largest proportion of North Carolina Coastal Region overnight visitors classifies themselves as white (89.3%), and five percent classify themselves as black/African American. More than two percent listed their ethnicity as Asian/Pacific Islander.

The average Coastal Region overnight visitor is 44 years old and more than two-thirds (68%) of regional overnight visitor parties have a household head with a college degree or higher.

The average household income of a visitor party to the Coastal Region in 2018 was \$91,830 with more than half (56%) of the visitor parties reporting a household income \$75,000 or more. Twenty-four percent had a household income of over \$125,000.

Seventy-four percent of overnight visitor parties reported that the head of household is employed, while fifteen percent are retired. The remainder reported “not employed” as work status.

The average household size of a North Carolina Coastal Region overnight visitor party in 2018 was 2.7.

2018 Top Advertising Markets

In 2018, the top advertising markets sending overnight visitors to **North Carolina's Coastal Region** were Raleigh-Durham-Fayetteville (16.3%), Charlotte (8.9%), Greensboro-High Point-Winston-Salem (7.3%), Washington DC (6.4%), Richmond-Petersburg, VA (5.7%), Norfolk-Portsmouth-Newport News, VA (5.3%), New York, NY (3.8%) and Philadelphia (3.7%). The share of visitors from Charlotte increased from eleven percent in 2017 to nearly seventeen percent in 2018, and the share of visitors from Richmond-Petersburg and Nashville increased as well. Advertising markets correspond with Nielsen's Designated Market Areas (DMAs).

Top Advertising Markets of Origin for *Overnight* Coastal Region Visitors

<i>DMA of Origin</i>	<i>2018 % of Coastal Visitors</i>	<i>2017 % of Coastal Visitors</i>	<i>2018 Coastal Share of Total NC Visitors from DMA</i>	<i>2017 Coastal Share of Total NC Visitors from DMA</i>
Raleigh-Durham (Fayetteville)	16.3%	17.9%	30.5%	27.8%
Charlotte	8.9%	6.0%	16.6%	11.1%
Greensboro-High Point-Winston Salem	7.3%	7.1%	26.3%	21.3%
Washington DC Metro	6.4%	6.4%	27.5%	33.3%
Richmond-Petersburg, VA	5.7%	3.8%	53.1%	37.9%
Norfolk-Portsmouth-Newport News, VA	5.3%	7.3%	39.5%	38.5%
New York, NY	3.8%	2.8%	14.5%	19.0%
Philadelphia, PA	3.7%	4.2%	33.3%	36.4%
Nashville	2.6%	0.8%	38.1%	11.8%
Johnstown-Altoona	2.1%	0.1%	75.0%	<0.1%
Clarksburg-Weston	2.1%	<0.1%	66.7%	<0.1%
Greenville-New Bern-Washington	2.0%	4.3%	21.4%	30.8%
Columbus, OH	1.8%	1.0%	31.3%	27.3%
Cleveland-Akron, OH	1.7%	0.8%	50.0%	13.3%
Baltimore	1.7%	1.9%	29.4%	23.8%
Roanoke-Lynchburg	1.6%	0.4%	22.7%	7.7%
Harrisburg-Lancaster-Lebanon-York	1.5%	0.6%	44.4%	100.0%
Jonesboro	1.2%	<0.1%	57.1%	<0.1%
Tri-Cities, TN-VA	1.1%	0.6%	13.6%	18.2%
Wilkes Barre-Scranton	1.1%	<0.1%	60.0%	<0.1%

Note: Advertising markets defined by Nielsen's Designated Market Area (DMA)

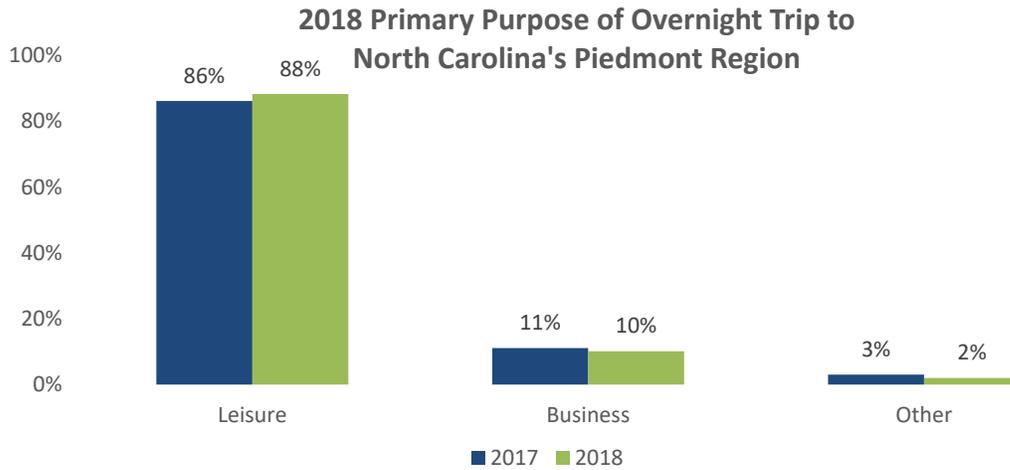
2018 Domestic Piedmont Region Visitor Profile

- ◆ In 2018, 66 percent of North Carolina visitors traveled to North Carolina’s Piedmont Region, approximately 33.8 million person-trips (approximately 26.0 million overnight person-trips). For marketing purposes, the Piedmont Region is made up of the 49 most central counties of North Carolina. *Note that the regional volume totals do not sum to the statewide volume total, as some visitors travel to multiple geographic regions in one visit.
- ◆ Eighty-seven percent of all domestic visitors (88 percent of overnights) came to the Piedmont Region for pleasure purposes, while ten percent of all visitors (10 percent of overnights, down from 17 percent in 2015) came to conduct business (includes meeting/convention).
- ◆ Travel to the Piedmont was more consistent seasonally than the other regions. Summer (June - August) welcomed the most visitors with twenty-eight percent. Spring (March - May) had twenty-five percent of the region’s annual visitors. Fall (September - November) and winter (January, February and December) each welcomed twenty-four percent of the region’s visitors.
- ◆ Overnight visitors to the Piedmont Region spent an average of 3.3 nights in the region.
- ◆ Fifty-one percent of Piedmont Region visitors lodged in a hotel/motel, and forty-three percent stayed in a private home. Three percent of overnight visitors to the region reported staying in a shared economy property such as AirBnB or VRBO.
- ◆ The average travel party size for all Piedmont Region visitors was 2.1 people. Twenty-seven percent of all travel parties to the region included children in the party (28 percent of overnights).
- ◆ Seventy-nine percent of all overnight travelers to the Piedmont Region drove (includes personal automobile, rental, and motorcycle), while seventeen percent traveled by air.
- ◆ In 2018, the average household trip expenditure in the Piedmont Region was \$511. The average household trip expenditure for overnight visitors to the Piedmont Region was \$634. Daytrip parties to the Piedmont region spent approximately \$211 per visit in 2018.
- ◆ The top states of origin of *overnight* visitors to the Piedmont Region in 2018 were North Carolina (32%), Virginia (8%), South Carolina (7%), Florida (6%), New York (6%) and Georgia (5%).
- ◆ Fifty-three percent of the households (56 percent of overnight) that traveled to North Carolina’s Piedmont Region in 2018 had a household income over \$75,000.
- ◆ In 2017, Charlotte (10.8%) was the top advertising market of origin for *overnight* travelers to the Piedmont Region, followed by Raleigh/Durham/Fayetteville (8.2%), New York (7.1%), Greenville-Spartanburg-Asheville-Anderson (5.1%), Greensboro-High Point-Winston Salem (4.7%), Washington DC (4.6%) and Atlanta (3.9%).

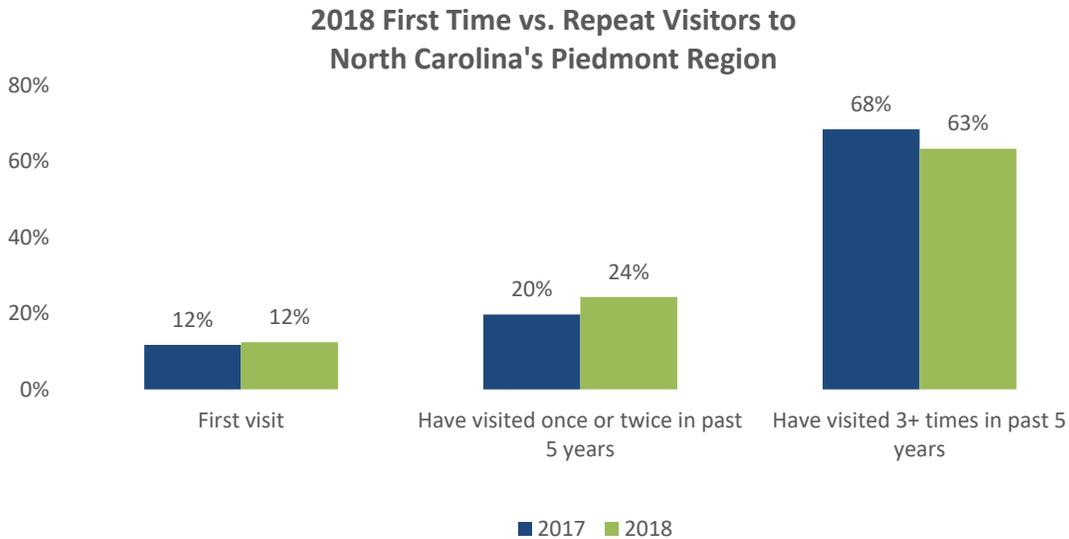
Piedmont Region Overnight Visitor Profile

Main Purpose of Visit

In 2018, eighty-eight percent of domestic overnight visitors came to the Piedmont Region for leisure purposes, which included visiting friends and relatives, outdoor recreation and entertainment/sightseeing. This is up from seventy-two percent in 2014. Business travel visitors represented ten percent of the region’s visitors.

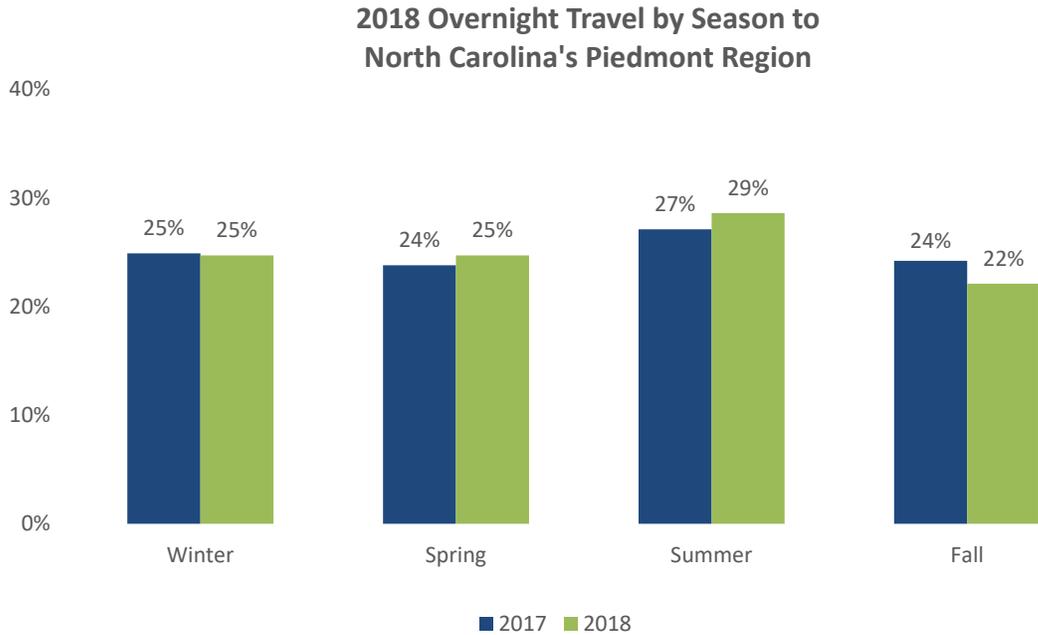


Frequent, repeat visitors to North Carolina comprised the largest proportion of Piedmont Region visitors. Twelve percent of the region’s out-of-state visitors were first time visitors in 2018.



Travel Volume by Season

The Piedmont Region typically sees more consistent visitation throughout the year than the other two regions. The summer season saw a slight increase in proportion of visitors and fall saw a slight decrease from 2017 to 2018.



Average Length of Stay

In 2018, an average of 3.3 nights was spent by visitors to North Carolina’s Piedmont Region. This was similar to the 2017 length of stay. Data indicates that out-of-state visitors stay an average of 3.7 nights, while in-state visitors stay an average of 2.3 nights.

Travel Party Size

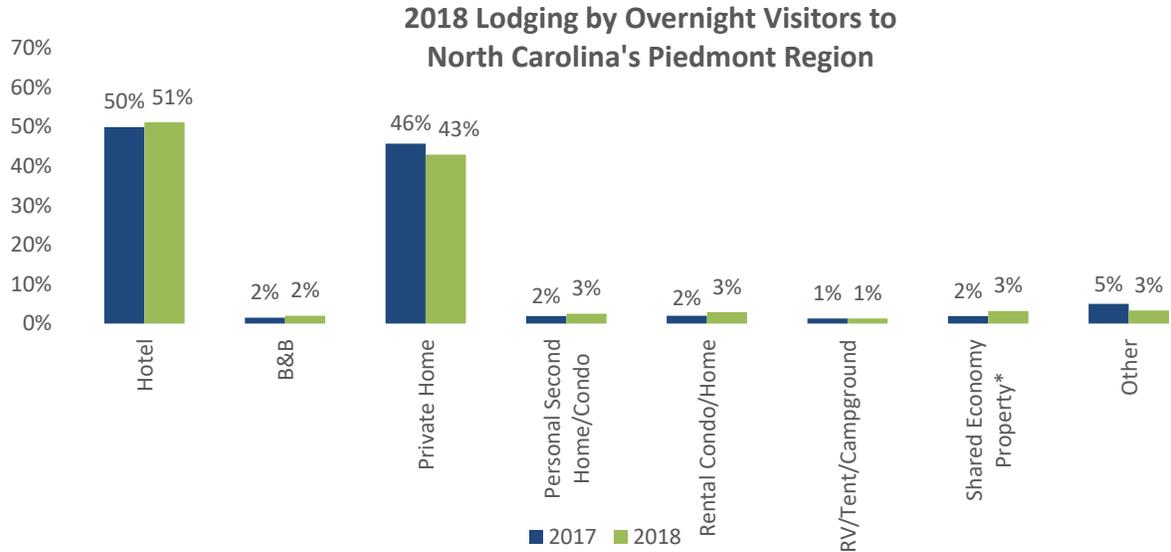
The average travel party size for all Piedmont Region overnight visitors was 2.1 people.

Children on Trip

Twenty-eight percent of overnight visitor parties to the Piedmont Region included children. Among those who traveled with children, the average number of children on trips was 1.8.

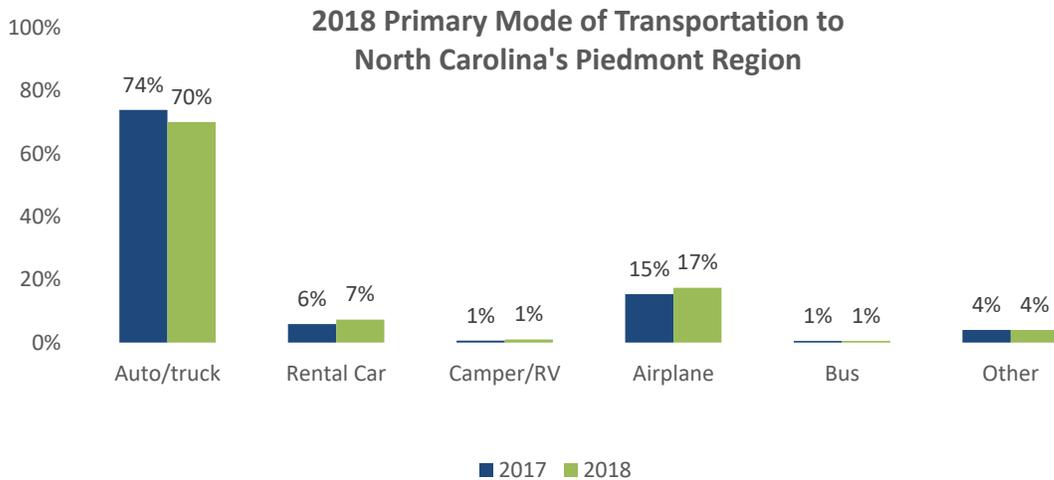
Lodging Used in Piedmont Region

In 2018, half of Piedmont Region visitors stayed in a hotel/motel, and nearly half (43%) of visitors stayed in a private home. Data reflected that in 2018 approximately three percent of Piedmont Region visitors chose to use some type of shared economy lodging, such as AirBnB or VRBO. It should be noted that some visitors use more than one type of accommodation during a visit, so totals equal more than 100%.



Mode of Transportation

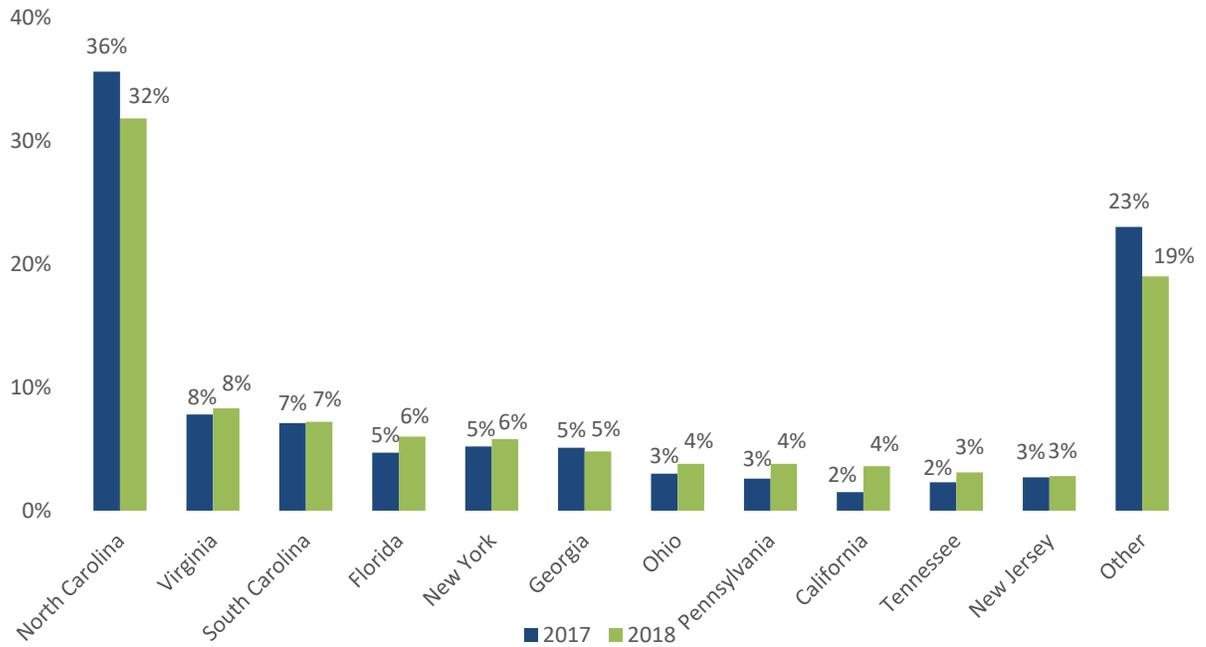
In 2018, personal auto was most used form of transportation (70%) to the Piedmont Region, however seventeen percent traveled by air.



Origin of Visitors

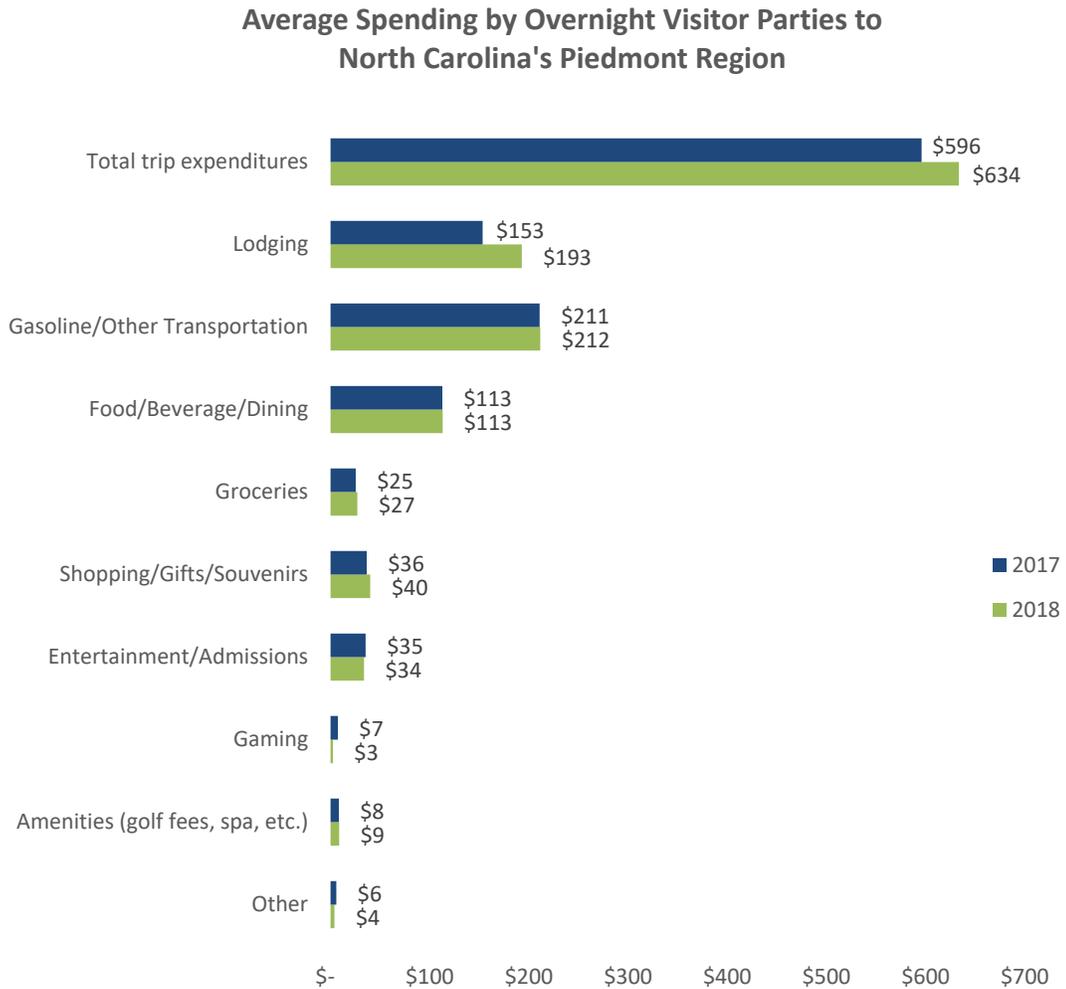
In 2018, the top states of origin for Piedmont Region overnight visitors included North Carolina (32%), Virginia (8%), South Carolina (7%), Florida (6%), New York (6%), Georgia (5%) and Ohio (4%). The proportion of visitors to the Piedmont from Virginia, Florida, New York, Ohio, Pennsylvania, California and Tennessee from 2017 to 2018.

2018 Top States of Origin of Overnight Visitors to North Carolina's Piedmont Region



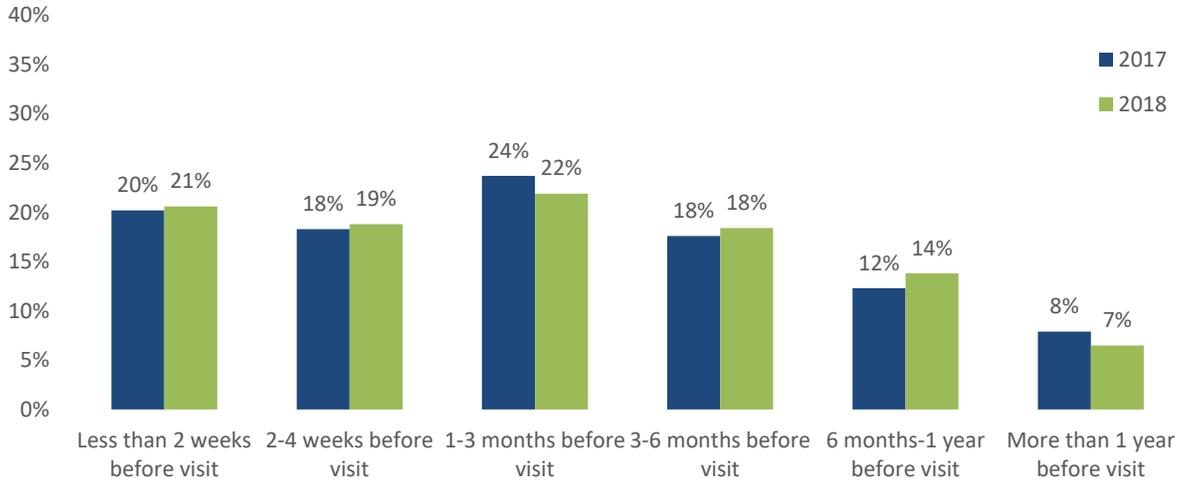
Amount Spent in Piedmont Region

The average overnight visitor party spending in the Piedmont Region was \$634, up six percent from 2017. Most of the increases were in the lodging category.



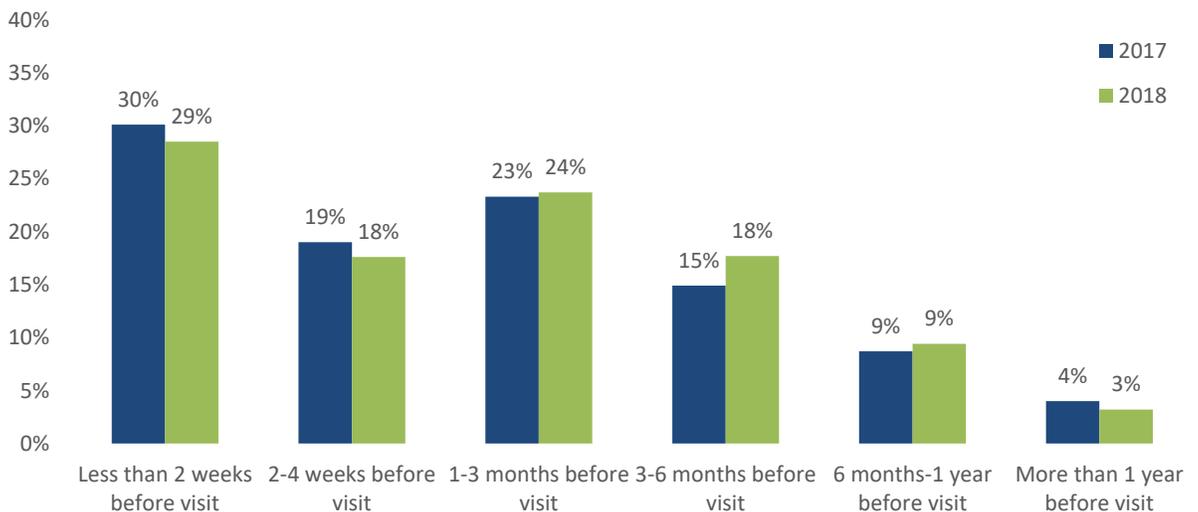
Travel Planning to Piedmont Region

2018 Length of Time to *Consider* NC as Travel Destination



Piedmont Region overnight visitors consider and decide to visit North Carolina within a shorter time frame than North Carolina visitors overall. Forty percent of Piedmont Region visitors considered the state one month or less ahead of travel, and nearly fifty percent decided to visit less than one month prior to travel.

2018 Length of Time to *Decide On* NC as Travel Destination



Activities

The following chart provides activities participated in by Piedmont Region visitors in 2018. These are not indicative of purpose of trip, but activities participated in while in the North Carolina. Over one-third (34%) of the overnight visitors to the piedmont visited with relatives while in the region. Nearly twenty-seven percent shopped and seventeen percent visited friends. Other popular activities included fine dining (14%), visiting historic sites (10%), urban sightseeing (9%), rural sightseeing (8%) and museums (8%). ****Note that responses to this question are not mutually exclusive and percentages do not equal 100%. Therefore, proportions should not be aggregated to combine categories of activities. Also note that these activities do not imply purpose of trip.***

Activities Participated in by Overnight Visitors to North Carolina's Piedmont Region

Activity	2017	2018
Visiting relatives	36.3%	33.8%
Shopping	24.0%	26.6%
Visiting friends	18.2%	16.7%
Fine dining	12.2%	14.3%
Historic sites/churches	8.0%	10.0%
Urban sightseeing	8.1%	8.6%
Rural sightseeing	11.2%	7.8%
Museums	9.5%	7.7%
Craft Breweries	6.6%	5.8%
Nightclub/dancing	4.2%	5.8%
State park/Monument/Recreation area	6.4%	5.6%
Hiking/Backpacking/Canyoneering	3.4%	4.5%
Wildlife viewing	2.8%	4.4%
Musical performance/show	4.6%	3.9%
Gardens	4.5%	3.8%
Local/folk arts/crafts	3.7%	3.8%
Old homes/mansions	4.1%	3.8%
Golf	2.6%	3.8%
Art galleries	3.5%	3.5%
Bird watching	1.3%	3.4%
Theater/drama	1.7%	3.4%
Wine tasting/winery tour	3.3%	3.1%
Fishing	3.1%	3.1%
Zoos/Aquariums Aviaries	3.0%	3.0%
Nature travel/ecotouring	1.7%	2.9%
Youth/Amateur/Collegiate/Sporting Event <u>Spectator</u>	3.8%	2.8%
Other nature (photography, rockhounding, etc.)	1.7%	2.7%
Special events/Festivals	3.2%	2.6%
Spa/health club	1.9%	2.6%
Theme park/Amusement park/Water park	3.0%	2.3%
Youth/Amateur/Collegiate/Sporting Event <u>Participant</u>	1.5%	2.1%
Biking/Road biking/Cycling	1.6%	2.1%
Sport Events-Major/Professional	2.4%	2.0%
Tennis	0.1%	1.6%

Demographic Profile of North Carolina Overnight Visitors to the Piedmont Region

Nearly two-thirds of the Piedmont Region’s overnight visitors (62.0%) of the visitors are married and twenty-seven percent have never married. Eleven percent of the region’s visitors are divorced, widowed or separated.

The largest proportion of North Carolina Piedmont Region overnight visitors classify themselves as white (78.3%), and nearly fourteen percent classify themselves as black/African American.

The average Piedmont Region visitor is 44 years old and more than two-thirds (67.9%) of regional overnight visitor parties have a household head with a college degree or higher.

The average household income of a visitor party to the Piedmont Region in 2018 was \$90,700. More than half (56.4%) of the visitor parties that traveled to North Carolina’s Piedmont Region in 2018 had a household income \$75,000 or over. Twenty-three percent had a household income of over \$125,000.

More than two-thirds (67.9%) of overnight visitor parties reported that the head of household is employed, while fifteen percent are retired. The remainder reported “not employed” as work status.

The average household size of a North Carolina Piedmont Region overnight visitor party in 2018 was 2.7.

2018 Top Advertising Markets

In 2018, the top advertising markets sending overnight visitors to **North Carolina's Piedmont Region** were Charlotte (10.8%), Raleigh-Durham-Fayetteville (8.2%), New York, NY (7.1%), Greenville-Spartanburg-Asheville (5.1%), Greensboro-High Point-Winston Salem (4.7%), Washington DC (4.6%) and Atlanta (3.9%). Advertising markets correspond with Nielsen's Designated Market Areas (DMAs).

Top Advertising Markets of Origin for Overnight Piedmont Region Visitors

<i>DMA of Origin</i>	<i>2018 % of Piedmont Visitors</i>	<i>2017 % of Piedmont Visitors</i>	<i>2018 Piedmont Share of Total NC Visitors from DMA</i>	<i>2017 Piedmont Share of Total NC Visitors from DMA</i>
Charlotte	10.8%	10.0%	48.4%	42.5%
Raleigh-Durham (Fayetteville)	8.2%	11.6%	37.0%	41.7%
New York, NY	7.1%	4.2%	65.8%	64.3%
Greenville-Spartanburg-Asheville	5.1%	3.6%	39.8%	40.4%
Greensboro-High Point-Winston Salem	4.7%	5.4%	41.3%	37.2%
Washington DC Metro	4.6%	3.0%	46.4%	37.0%
Atlanta	3.9%	4.2%	31.0%	32.9%
Greenville-New Bern-Washington	2.7%	3.8%	67.9%	64.1%
Philadelphia	2.7%	2.6%	57.6%	51.5%
Wilmington	2.1%	2.0%	65.2%	37.1%
Norfolk-Portsmouth-Newport News	2.1%	2.8%	39.5%	34.6%
Tri-Cities, TN-VA	1.8%	0.1%	59.1%	9.1%
Tampa-St. Petersburg	1.8%	0.9%	48.0%	42.9%
Roanoke-Lynchburg	1.7%	1.2%	54.5%	61.5%
Houston	1.5%	1.0%	83.3%	77.85
Los Angeles	1.5%	0.4%	100.0%	100.0%
Columbus, OH	1.5%	0.8%	62.5%	45.5%
Jacksonville, FL	1.5%	0.8%	76.9%	45.5%
San Francisco-Oakland-San Jose	1.4%	0.3%	81.8%	100.0%
Columbia	1.3%	1.5%	40.9%	38.5%

Note: Advertising markets defined by Nielsen's Designated Market Area (DMA)

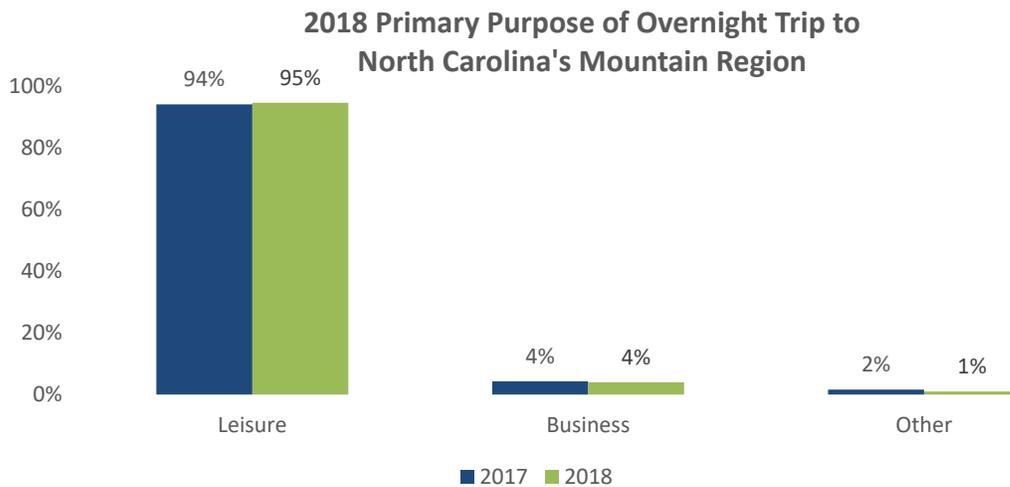
2018 Domestic Mountain Region Visitor Profile

- ◆ In 2018, 28 percent of North Carolina visitors traveled to North Carolina’s Mountain Region, approximately 14.5 million person-trips (approximately 11.4 million overnight person-trips). For marketing purposes, the Mountain Region is made up of the 23 western-most counties of North Carolina. *Note that the regional volume totals do not sum to the statewide volume total, as some visitors travel to multiple geographic regions in one visit.
- ◆ Ninety-four percent of all domestic visitors (95 percent of overnight visitors), came to the Mountain Region for pleasure purposes, while four percent of all visitors (4 percent of overnight visitors) came to conduct business (includes meeting/convention).
- ◆ Travel to the mountains of North Carolina was heaviest in the spring and summer. The summer (June – August) had the highest proportion of visitors, with thirty percent of all 2018 mountain visitors. The spring (March - May) had with twenty-nine percent of visitors, followed by winter with more than twenty-one percent. The fall (September - November) welcomed twenty percent of all mountain visitors.
- ◆ Overnight visitors to the Mountain Region in 2018 spent an average of 2.9 nights in the region.
- ◆ Sixty-seven percent of Mountain Region visitors lodged in a hotel/motel, while seventeen percent stayed at a private home. Two percent stayed in a rental home and personal second home/condo. More than six percent in an RV/tent/campground. Seven percent of visitors to the region reported staying in a shared economy property in 2018.
- ◆ The average party size for all Mountain Region visitors was 2.2 people (2.1 for overnight parties). Twenty-five percent of all travel parties to the region included children in the party (21 percent of overnight parties).
- ◆ Ninety-two percent of *overnight* travelers to the Mountain Region drove (includes personal automobile, rental vehicle, RV/camper), while five percent traveled by air.
- ◆ In 2018, the average trip expenditure in the Mountain Region was \$557. The average trip expenditure for overnight visitors to the Mountain Region was \$678. Daytrip parties to the Mountain Region spent approximately \$211 per visit.
- ◆ The top states of origin of *overnight* visitors to the Mountain Region were North Carolina (39%), Georgia (14%), South Carolina (9%), Virginia (7%), Florida (7%) and Tennessee (6%).
- ◆ Forty-five percent of the households (48 percent of overnight) that traveled to North Carolina’s Mountain Region in 2018 had a household income over \$75,000.
- ◆ In 2018, Charlotte (14.3%), was the top DMA of origin for *overnight* travelers to the Mountain Region, followed by Greenville/Spartanburg/Anderson/Asheville (13.3%), Atlanta (13.1%), Raleigh/Durham/Fayetteville (8.4%) and Greensboro-High Point-Winston Salem (4.0%).

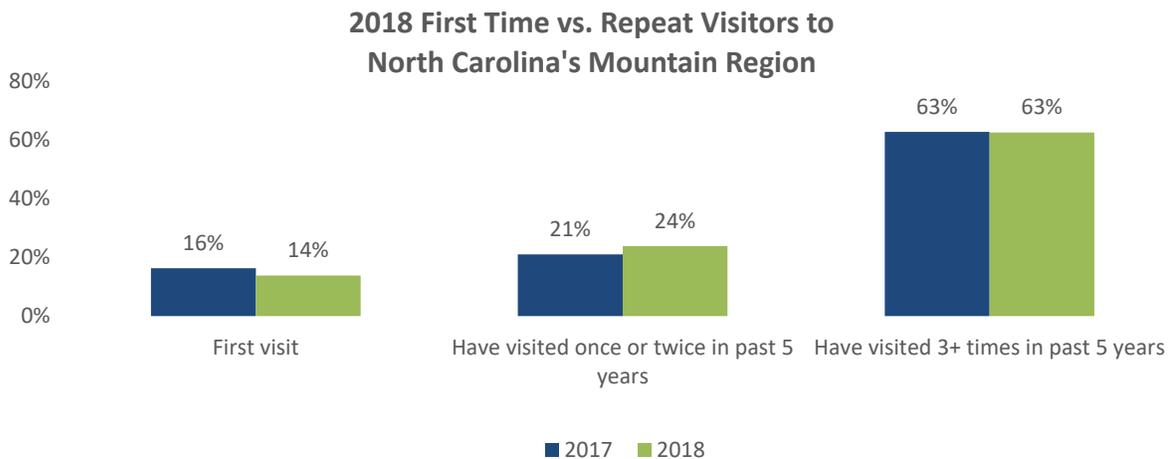
Mountain Region Overnight Visitor Profile

Main Purpose of Visit

In 2018, ninety-five percent of domestic overnight visitors came to the Mountain Region for leisure purposes, which included visiting friends and relatives, outdoor recreation and entertainment/sightseeing. Four percent of domestic overnight visitors came for general business, convention, seminar or other group meeting.

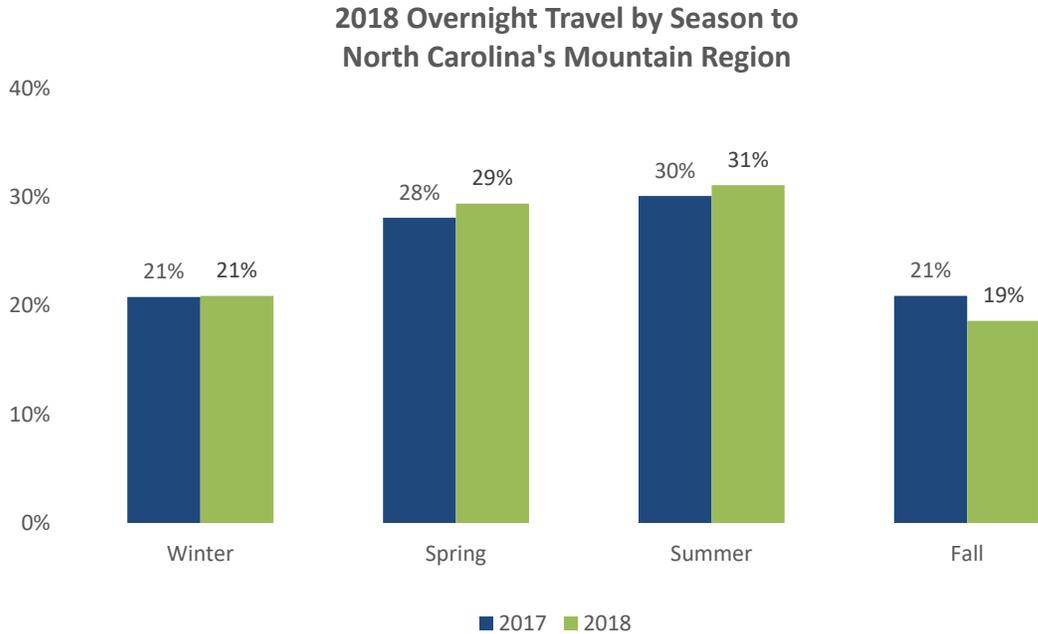


The proportion of visitors to North Carolina’s Mountain Region who were first time visitors was fourteen percent in 2018, down slightly from sixteen percent in 2017, though the majority of overnight visitors (63%) have visited more than three times in the past five years.



Travel Volume by Season

When examining visitation based on the typical seasonal schedule, the summer season (June through August) was the most popular in terms of proportion of overnight visitors to the Mountain Region in 2018 with thirty-one percent. The spring season (March through May) followed with twenty-nine percent. Winter (December through February) and fall (September through November) welcomed twenty-one and nineteen percent of visitors respectively.



Average Length of Stay

In 2018, an average of 2.9 nights was spent by visitors to North Carolina’s Mountain Region, down from 3.4 nights in 2017. Data indicates that out-of-state visitors stay an average of 3.4 nights, while in-state visitors stay an average of 2.3 nights.

Travel Party Size

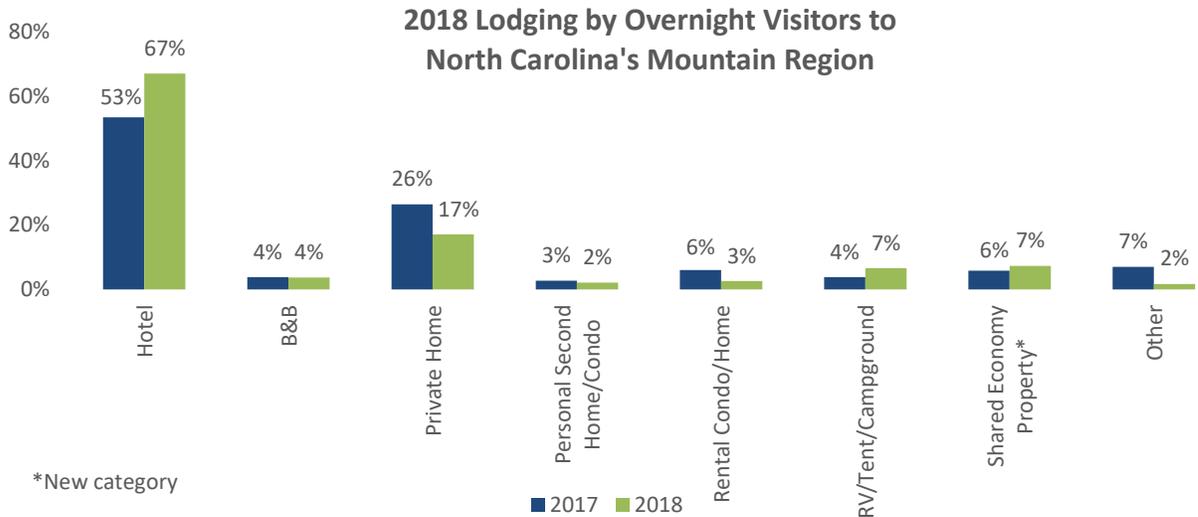
The average travel party size for Mountain Region overnight visitors was 2.1 people, similar to 2017.

Children on Trip

Twenty-one percent of overnight visitor parties to the Mountain Region included children. Among those who traveled with children, the average number of children on trips was 1.7.

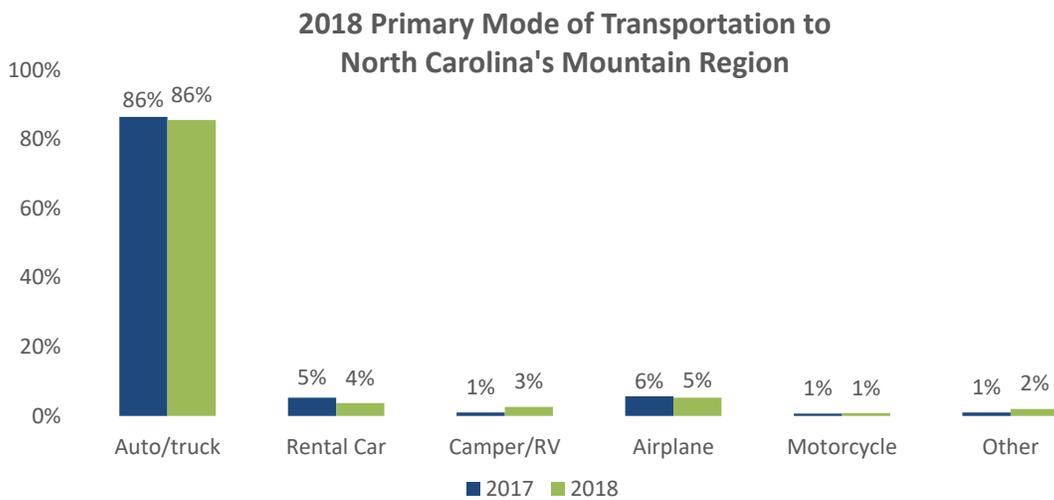
Lodging Used in Mountain Region

In 2018, more than two-thirds of Mountain Region visitors stayed in a hotel/motel, seventeen percent lodged in a private home, four percent stayed in a bed and breakfast and three percent stayed in a rental home/condo. Data indicated that approximately seven percent of Mountain Region visitors chose to use some type of shared economy lodging, such as AirBnB or VRBO. It should be noted that some visitors use more than one type of accommodation during a visit, so totals equal more than 100%.



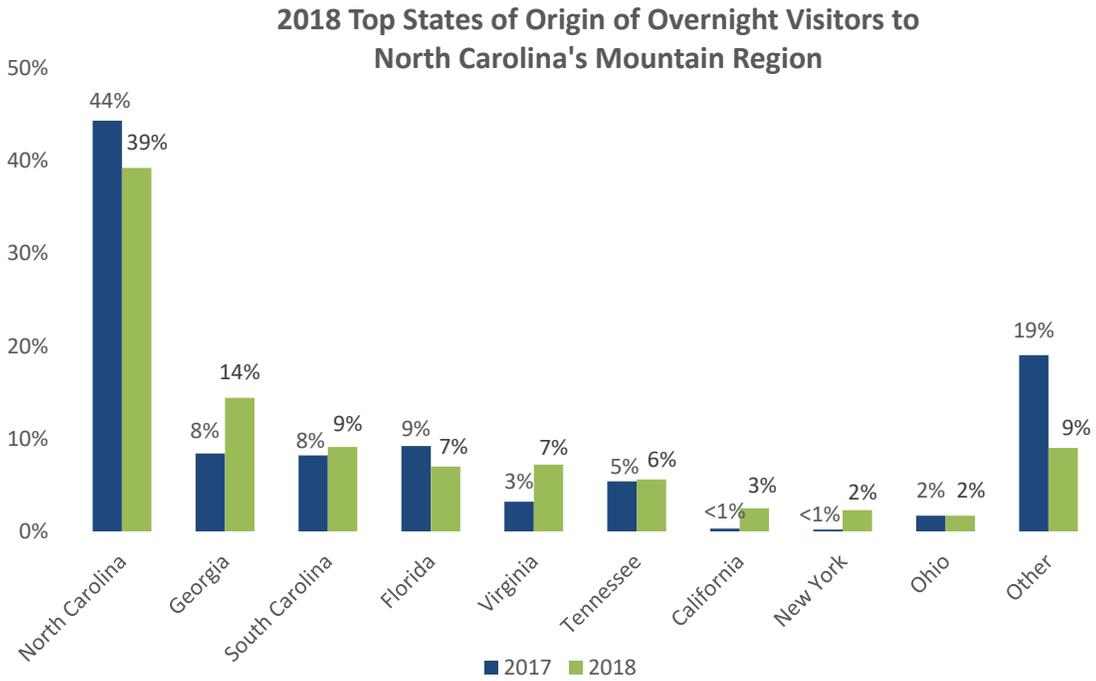
Mode of Transportation

In 2018, the personal auto was by far the dominant form of transportation (86%) for overnight visitors to the Mountain Region, while five percent traveled by air.



Origin of Visitors

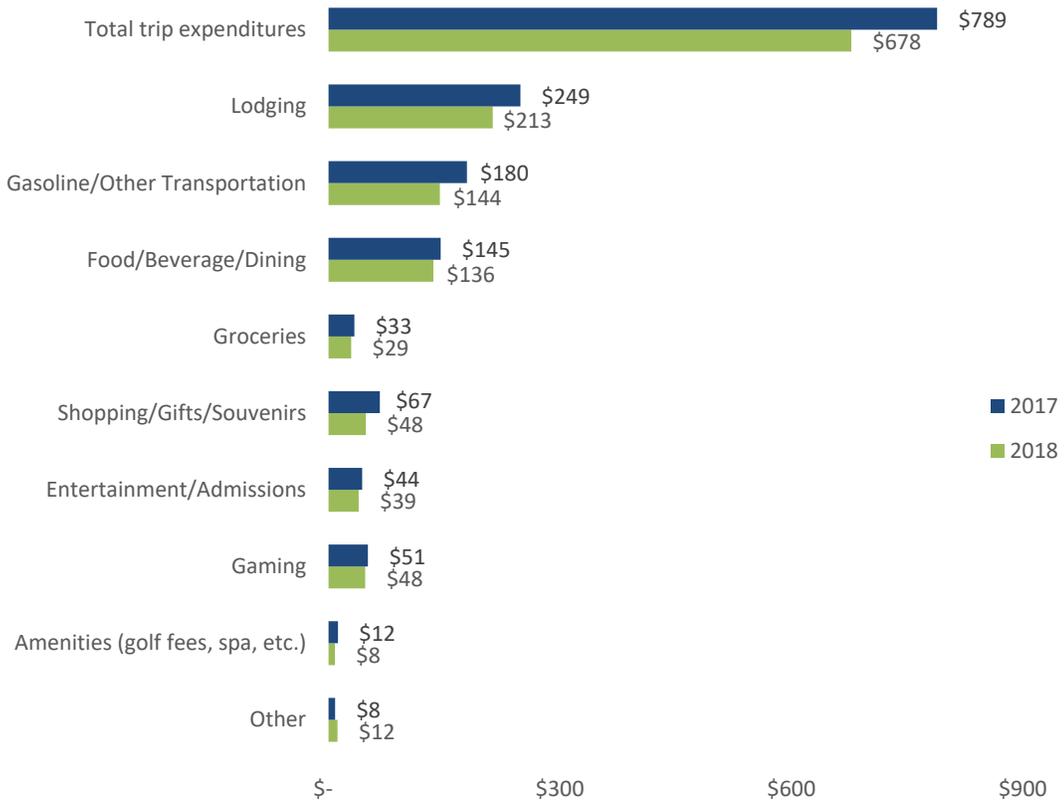
In 2018, the top states of origin for Mountain Region overnight visitors included North Carolina (39%), Georgia (14%), South Carolina (9%), Florida (7%), Virginia (7%) and Tennessee (6%). The proportion of visitors from Georgia increased from 8 percent in 2017 to 14 percent in 2018.



Amount Spent in Mountain Region

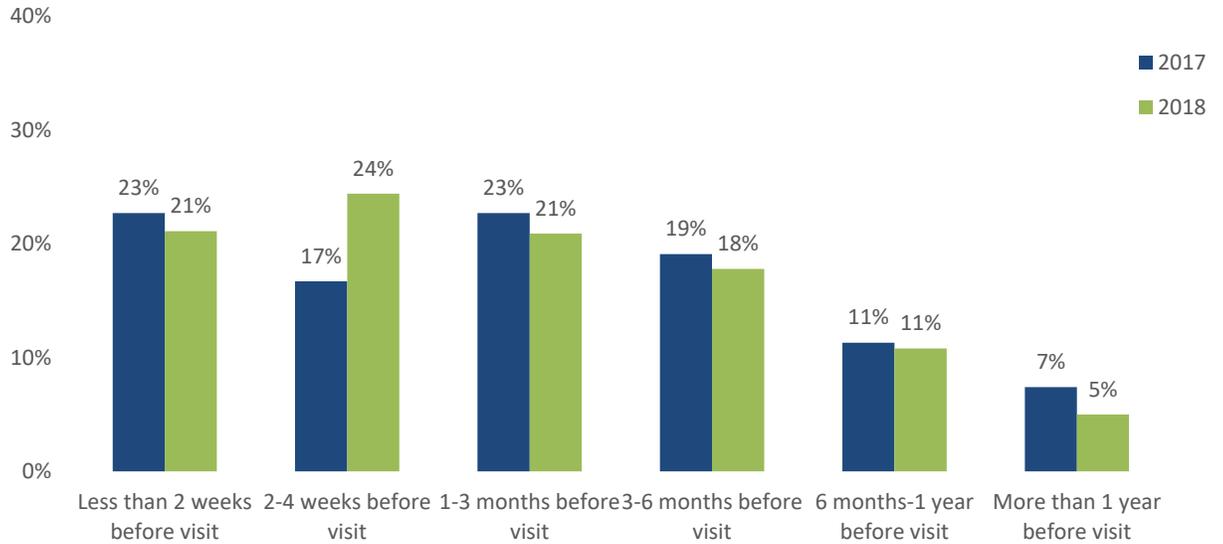
The average overnight visitor party spending in the Mountain Region was \$678, down from \$789 in 2017. Nearly all spending categories decreased slightly. While the Mountain Region overnight volume was up three percent from 2017, length of stay in the region decreased in 2018 leading to lower trip level spending.

Average Spending by Overnight Visitor Parties to North Carolina's Mountain Region



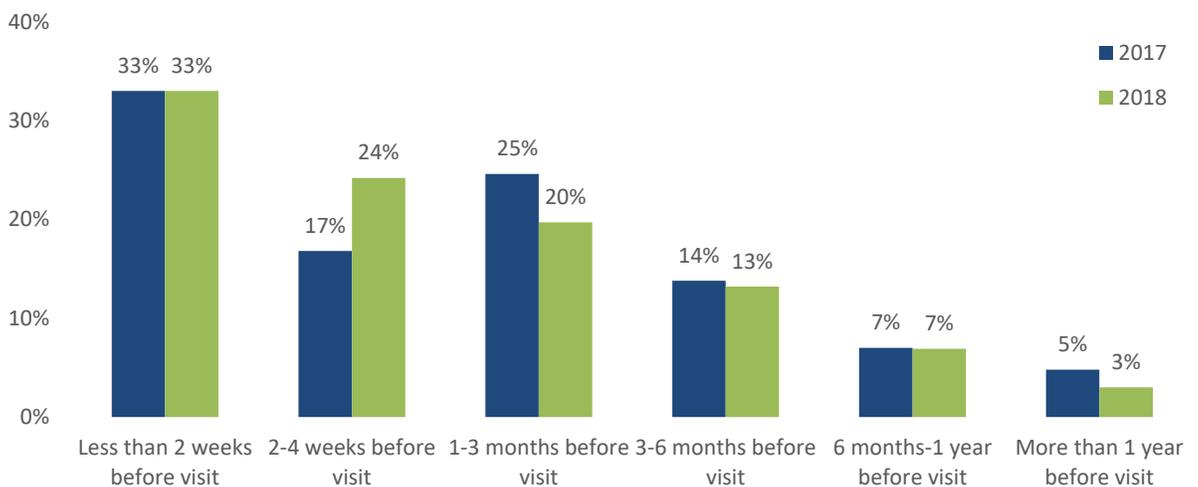
Travel Planning to Mountain Region

2018 Length of Time to *Consider* NC as Travel Destination



Forty-five percent of Mountain Region visitors considered the state one month or less ahead of travel, and sixteen percent considered the visit more than six months prior to travel. More than half of the visitors made the decision one month or less ahead of travel.

2018 Length of Time to *Decide On* NC as Travel Destination



Activities

The following table provides activities participated in by Mountain Region visitors in 2017. These are not indicative of purpose of trip, but what activities visitors participate in while in North Carolina.

***Note that responses to this question are not mutually exclusive and percentages do not equal 100%. Therefore, proportions should not be aggregated to combine categories of activities. Also note that these activities do not imply purpose of trip.**

Activities Participated in by Overnight Visitors to North Carolina's Mountain Region

Activity	2017	2018
Rural sightseeing	26.2%	27.9%
Shopping	32.3%	26.9%
Hiking/Backpacking/Canyoneering	19.7%	19.0%
Visiting relatives	21.3%	18.0%
Historic sites/churches	19.4%	17.8%
Fine dining	16.6%	14.6%
State park/Monument/Recreation area	19.0%	14.3%
National park/Monument/Recreation area	14.4%	13.9%
Wildlife viewing	11.9%	13.7%
Visiting friends	12.9%	13.1%
Craft Breweries	11.8%	13.1%
Museums	8.1%	12.0%
Urban sightseeing	14.0%	11.6%
Local/folk arts/crafts	6.1%	11.5%
Old homes/mansions	15.8%	11.2%
Casino/gaming	11.1%	11.1%
Gardens	8.7%	9.5%
Art galleries	8.3%	9.2%
Other nature (photography, rockhound, etc.)	7.4%	8.7%
Wine tasting/winery tour	11.0%	8.4%
Musical performance/show	1.9%	7.8%
Nature travel/ecotouring	6.9%	6.8%
Bird Watching	2.5%	5.7%
Nightclub/dancing	2.7%	5.6%
Native American ruins	2.7%	3.8%
Zoos/Aquariums/Aviaries	3.1%	3.7%
Special Events/Festivals	2.0%	3.5%
Youth/Amateur/Collegiate/Sporting Event <u>Participant</u>	0.1%	3.1%
Fishing	4.2%	2.4%
Mountain biking	1.6%	2.3%
Biking/road biking/cycling	1.5%	2.2%
Spa/Health Club	1.7%	1.8%
Golf	2.8%	1.5%
Musical Theater	1.6%	1.4%
Farms/Ranches/Agri-tours	1.5%	1.4%
Theme Park/Amusement Park/Water Park	4.1%	1.3%
Rock/mountain climbing	3.7%	1.3%
Whitewater rafting/kayaking/canoeing etc.	4.0%	1.3%

2018 Demographic Profile of North Carolina Overnight Visitors to the Mountain Region

Nearly two-thirds of North Carolina Mountain Region overnight visitors are married, while twenty-five percent of the region’s visitors have never been married. Ten percent are divorced, widowed or separated.

The largest proportion of North Carolina Mountain Region overnight visitors classify themselves as white (94%), and one percent classify themselves as black/African American. Two percent reported that they are Asian/Pacific Islander.

The average Mountain Region visitor is 46 years old, and more than two-thirds (69%) of Mountain Region overnight visitor parties have a household head with a college degree or higher.

The average household income of an overnight visitor party to the Mountain Region in 2018 was \$87,270. Nearly half (48%) of the overnight visitor parties that traveled to North Carolina’s Mountain Region in 2018 had a household income \$75,000 or over. Twenty-two percent had a household income of over \$125,000.

More than two-thirds of overnight visitor parties reported that the head of household is employed, while twenty percent are retired. The remainder reported “not employed” as work status.

The average household size of a North Carolina Mountain Region overnight visitor party in 2018 was 2.5.

2018 Top Advertising Markets

In 2018, the top advertising markets sending overnight visitors to **North Carolina's Mountain Region** were Charlotte (14.3%), Greenville-Spartanburg-Asheville-Anderson (13.3%), Atlanta (13.1%), Raleigh/Durham (8.4%), Greensboro-High Point-Winston Salem (4.0%), and Tri-Cities, TN-VA (3.7%). As compared to 2017, in terms of proportion of visitors, the region saw growth from the Greenville/Spartanburg, Atlanta and Tri-Cities TN-VA markets. Advertising markets correspond with Nielsen's Designated Market Areas (DMAs).

Top Advertising Markets of Origin for Overnight Mountain Region Visitors

<i>DMA of Origin</i>	<i>2018 % of Total NC Visitors to Region</i>	<i>2017 % of Total NC Visitors to Region</i>	<i>2018 Mountain Share of NC Visitors from DMA</i>	<i>2017 Mountain Share of NC Visitors from DMA</i>
Charlotte	14.3%	19.3%	33.1%	39.9%
Greenville-Spartanburg-Asheville-Anderson	13.3%	3.8%	54.5%	21.1%
Atlanta	13.1%	9.0%	54.0%	35.4%
Raleigh-Durham (Fayetteville)	8.4%	10.4%	19.5%	18.3%
Greensboro-High Point-Winston Salem	4.0%	7.3%	18.8%	24.5%
Tri-Cities, TN-VA	3.7%	1.9%	59.1%	54.5%
Columbia	2.9%	2.9%	45.5%	34.6%
Knoxville	2.9%	1.5%	43.5%	33.3%
New York	2.5%	0.6%	11.8%	4.8%
Tampa-St. Petersburg	2.3%	1.6%	32.0%	35.7%
Myrtle Beach-Florence	2.2%	1.6%	33.3%	26.3%
Washington, DC	2.1%	1.8%	10.1%	11.1%
Nashville	1.7%	1.5%	28.6%	29.4%
Orlando-Daytona Beach-Melbourne	1.6%	2.1%	31.6%	36.8%
West Palm Beach-Ft. Pierce	1.6%	1.1%	46.2%	57.1%
Roanoke-Lynchburg	1.4%	0.4%	22.7%	7.7%
Chattanooga	1.3%	1.6%	71.4%	83.3%
Wilmington	1.2%	1.4%	17.4%	14.3%
Birmingham	1.1%	0.6%	57.1%	18.2%
San Francisco-Oakland-San Jose	1.0%	0.0%	36.4%	0.0%

Note: Advertising markets defined by Nielsen's Designated Market Area (DMA)

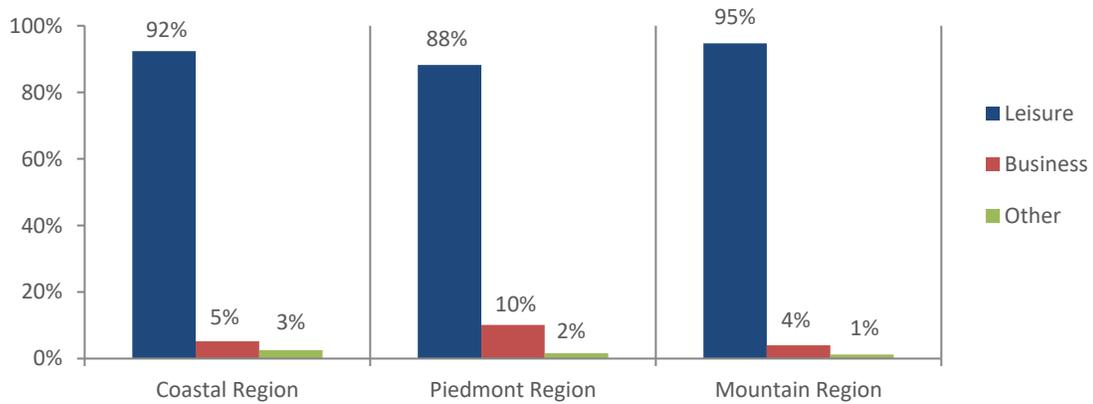
2018 Regional Comparison

The following section provides graphical representations of the three geographic regions together to offer comparisons and contrasts of the regions' visitors.

Purpose of Trip

Not surprisingly, North Carolina's Coastal and Mountain regions had larger shares of visitors travel to the regions for leisure reasons than the Piedmont Region.

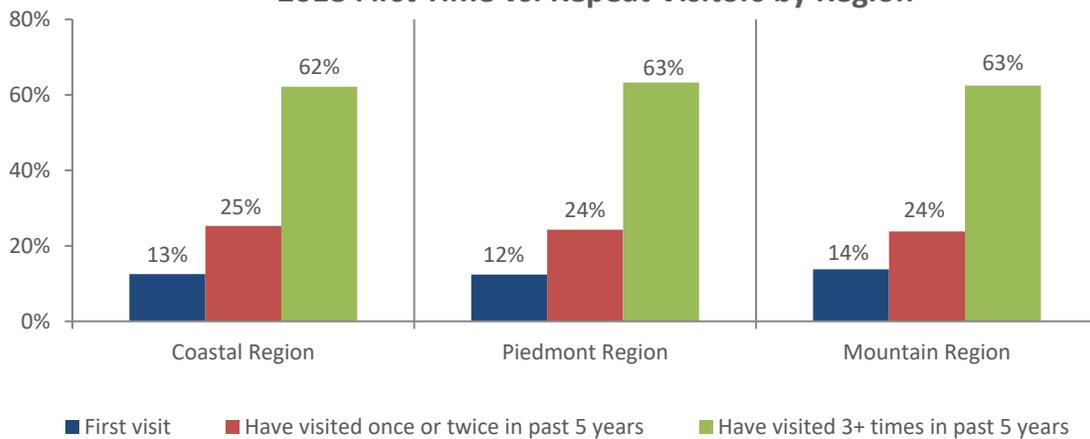
2018 Primary Purpose of Trip by Region



First Time vs. Repeat Visitors

The majority of each region's visitors are repeat visitors, though the Mountain Region saw a very slightly larger proportion of first time visitors than the other two regions in 2018.

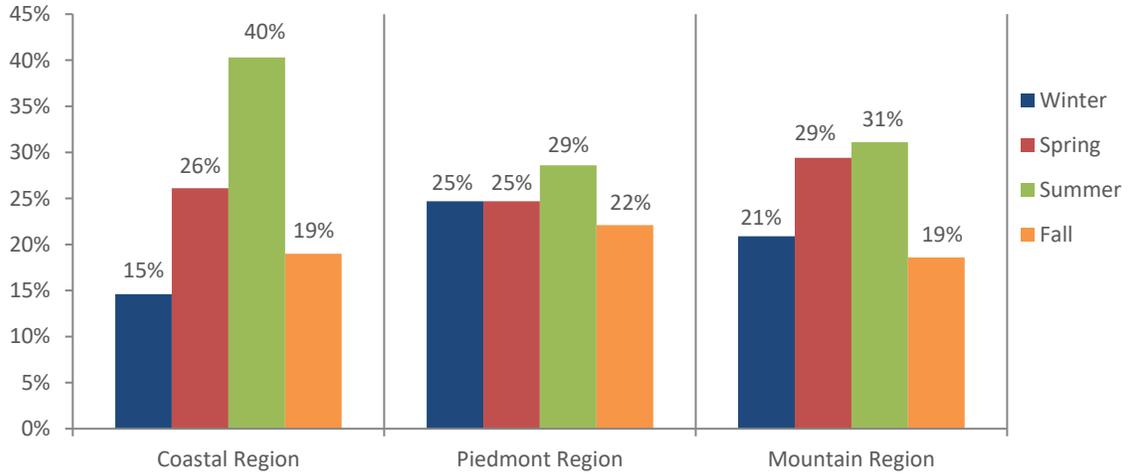
2018 First Time vs. Repeat Visitors by Region



Travel Volume by Season

The seasonal distribution of regional visitors helps understand the flow of travelers through the state. The Coastal Region sees a larger proportion of total visitors during the summer; while the mountain region had larger proportions of visitors during the spring and summer in 2018.

2018 Season of Travel by Region



Average Length of Stay for Overnight Visitors

Coastal Region All Overnight	Piedmont Region All Overnight	Mountain Region All Overnight
4.5 nights	3.3 nights	2.9 nights
Coastal Region Out-of-State	Piedmont Region Out-of-State	Mountain Region Out-of-State
5.5 nights	3.7 nights	3.4 nights
Coastal Region Resident	Piedmont Region Resident	Mountain Region Resident
2.9 nights	2.3 nights	2.3 nights

Travel Party Size for Overnight Visitors

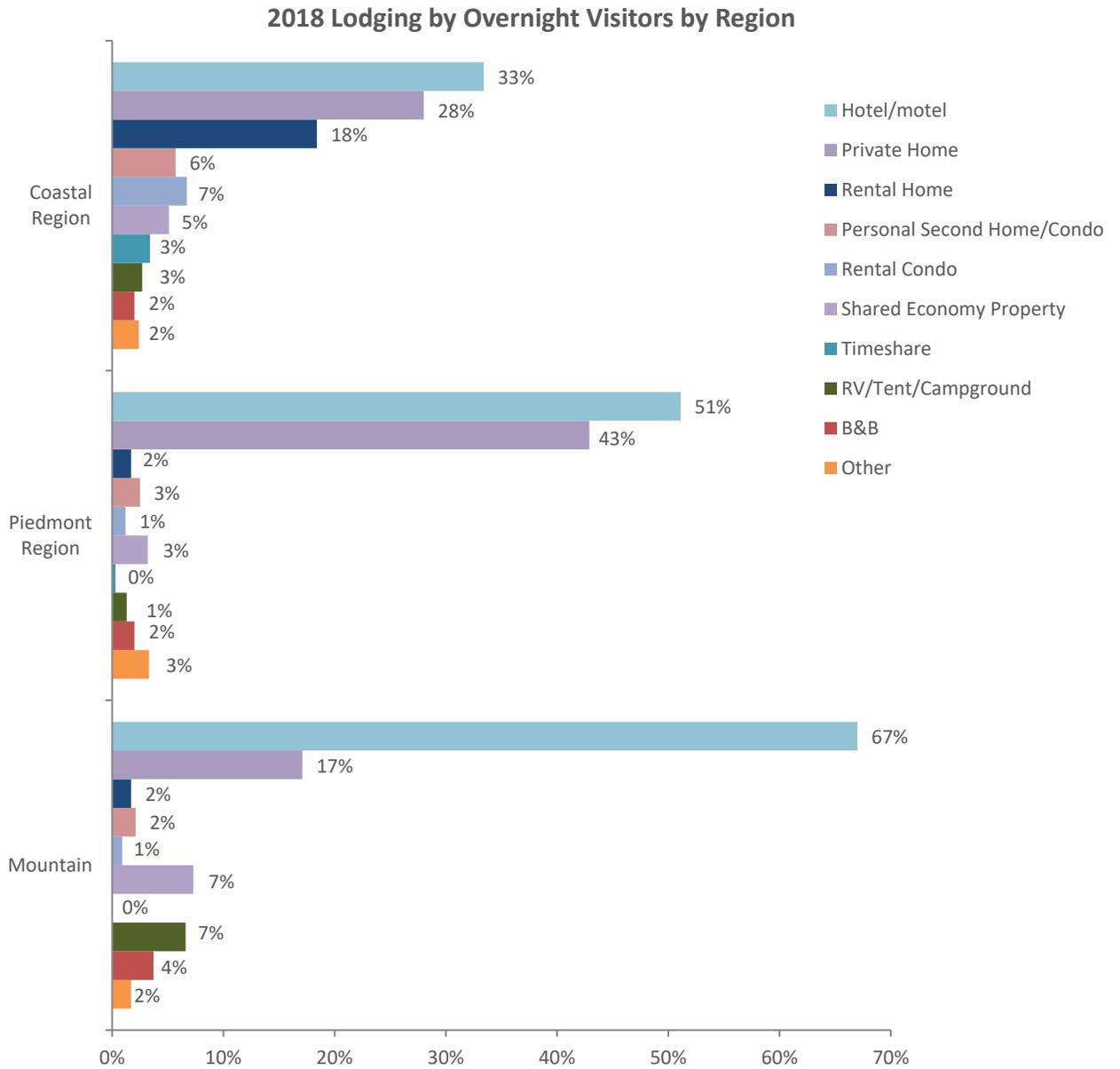
Coastal Region	Piedmont Region	Mountain Region
2.5 people	2.1 people	2.1 people
Coastal Region Out-of-State	Piedmont Region Out-of-State	Mountain Region Out-of-State
2.5 people	2.1 people	2.1 people
Coastal Region Resident	Piedmont Region Resident	Mountain Region Resident
2.6 people	2.1 people	2.1 people

Children on Trip for Overnight Visitors

Coastal Region	Piedmont Region	Mountain Region
44.4%	27.9%	20.9%
Coastal Region Out-of-State	Piedmont Region Out-of-State	Mountain Region Out-of-State
43.0%	29.1%	21.4%
Coastal Region Resident	Piedmont Region Resident	Mountain Region Resident
46.6%	25.3%	19.6%

Lodging Type

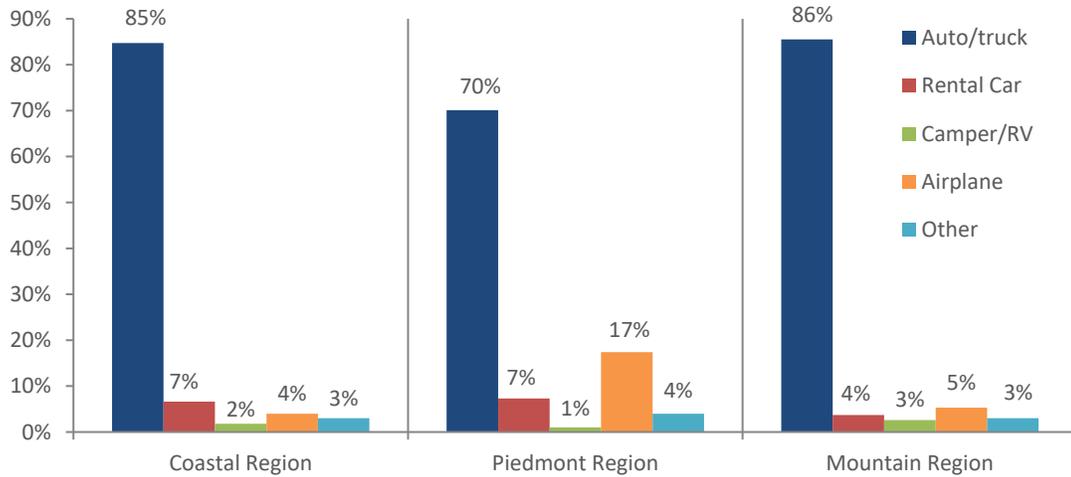
Hotels/motels and private homes are the most popular forms of lodging throughout the state, though the proportions vary by region. Mountain Region visitors use hotels/motels the most (67%), and while one-third of Coastal Region visitors also stay in hotels/motels, many stay in private and rental homes as well.



Mode of Transportation

Not surprisingly, auto transportation was the primary method of transportation for North Carolina overnight visitors. The Piedmont Region, with the most and largest airports, saw the most overnight travelers using air transportation (17%).

2018 Primary Transportation by Overnight Visitors by Region



Origin of Overnight Visitors

North Carolina is the top state of origin for all three regions of the state. In-state residents comprise the largest proportion of the state’s overnight visitors, and in each of the regions. The other top market states are similar, though there are some differences in rank between regions.

Coastal Region	Piedmont Region	Mountain Region
North Carolina (36.2%)	North Carolina (31.8%)	North Carolina (39.2%)
Virginia (13.9%)	Virginia (8.3%)	Georgia (14.4%)
Pennsylvania (7.9%)	South Carolina (7.2%)	South Carolina (9.1%)
Ohio (5.0%)	Florida (6.0%)	Virginia (7.2%)
Tennessee (4.5%)	New York (5.8%)	Florida (7.0%)
Maryland (4.1%)	Georgia (4.8%)	Tennessee (5.6%)
New Jersey (2.8%)	Pennsylvania (3.8%)	California (2.5%)
South Carolina (2.5%)	Ohio (3.8%)	New York (2.3%)
New York (2.5%)	California (3.6%)	Ohio (1.7%)
West Virginia (2.4%)	Tennessee (3.1%)	Alabama (1.7%)
California (2.4%)	New Jersey (2.8%)	Maryland (1.4%)

Trip Expenditures

Coastal Region visitor parties, on average, spend more than other regional visitors. Visitor parties to this region tend to have a slightly longer length of stay and have a slightly larger travel party size, explaining some of the higher spending. The higher spending can also likely be attributed to the type of lodging used by Coastal Region visitor and the cost of lodging in the region.

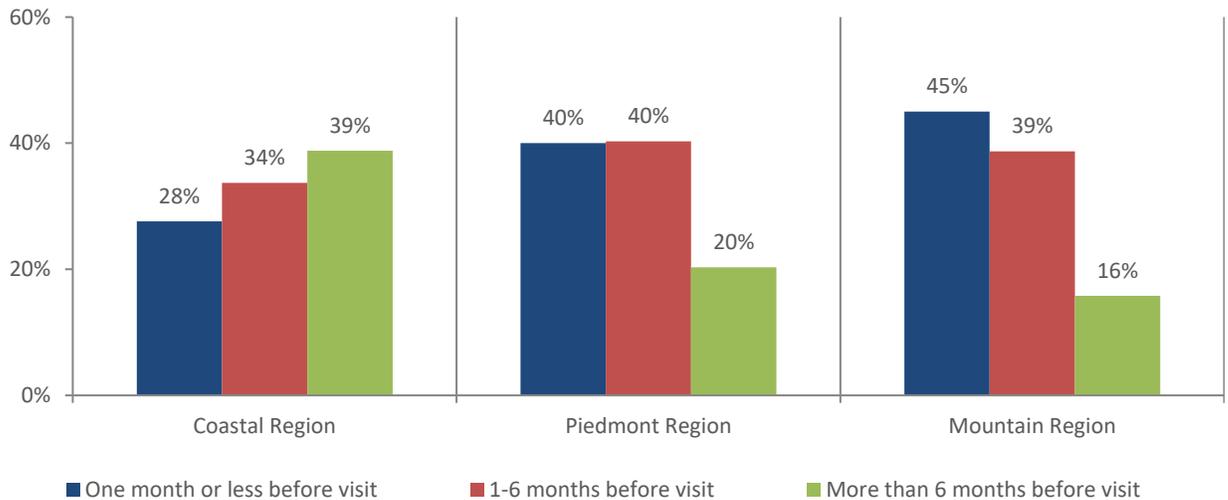
**2018 Average Trip Spending by Overnight Visitor Parties
by Region**



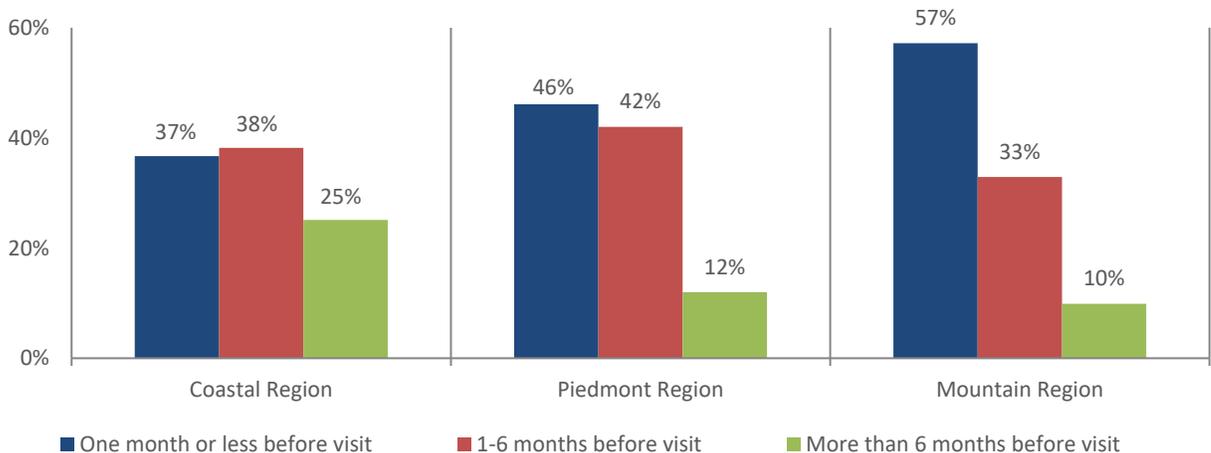
Trip Planning

Visitors to the Coastal Region of North Carolina considered and planned travel to the state farther in advance than did visitors to the Mountain or Piedmont regions. More than one-third of visitors who eventually traveled overnight to the Coastal Region began considering the trip more than six months prior to the visit, while only sixteen percent of Mountain Region visitors considered the region that far in advance. More than half of mountain visitors decided to visit the region one month or less prior to visit.

How Far in Advance Overnight Trip to North Carolina was Considered



How Far in Advance Overnight Trip to North Carolina was Decided



Activities

Activities participated in by North Carolina overnight travelers in 2018 vary somewhat by region, but common activities between regions include visiting friends and relatives, shopping and sightseeing. Mountain region visitors tend to participate in more activities per trip than other regions. **Note that responses to this question are not mutually exclusive and percentages do not equal 100%. Therefore, proportions should not be aggregated to combine categories of activities. Also note that these activities do not imply purpose of trip.*

Coastal Region	Piedmont Region	Mountain Region
Beach	Visiting relatives	Rural sightseeing
Shopping	Shopping	Shopping
Visiting relatives	Visiting friends	Hiking/Backpacking/Canyoneering
Fine dining	Fine dining	Visiting relatives
Historic sites/churches	Historic sites/churches	Historic sites/churches
Fishing	Beach	Fine dining
Visiting friends	Urban sightseeing	State park/Monument/Recreation area
Rural sightseeing	Rural sightseeing	National park/Monument/Recreation area
State park/Monument/Recreation area	Museums	Wildlife viewing
Wildlife viewing	Craft breweries	Visiting friends
Museums	Nightclub/dancing	Craft breweries
Zoos/ Aquariums/Aviaries	State park/Monument/Recreation area	Museums
Craft breweries	Hiking/ Backpacking/ Canyoneering	Urban sightseeing
Biking/Road biking/Cycling	Wildlife viewing	Local/folk arts/crafts
Urban sightseeing	Musical performance/show	Old homes/mansions
National park/Monument/Recreation area	Gardens	Casino/gaming
Golf	Local/folk arts/crafts	Gardens
Bird watching	Old homes/mansions	Art galleries
Old homes/mansions	Golf	Other nature (photography, rockhound, etc)
Gardens	Art galleries	Wine tasting/winery tour
Hiking/Backpacking/Canyoneering	Bird watching	Musical performance/show
Art galleries	Theater/drama	Nature travel/ecotouring
Wine tasting/winery tour	Wine tasting/winery tour	Bird watching
Rafting/Kayaking/Canoeing/etc.	Fishing	Nightclub/dancing
Local/folk arts/crafts	Zoos/ Aquariums/Aviaries	Beach
Nightclub/dancing	Nature travel/ecotouring	Native American ruins/Rock art
Nature travel/ecotouring	Sports events - Spectator	Zoos/ Aquariums/ Aviaries
Amusement park/Water park	Other nature (photography, rockhound, etc)	Special events/Festivals
ATV/Four-wheeling	Special events/Festivals	Sports events - Participant
Musical performance/show	Spa/health club	Fishing
Spa/health club	Amusement park/Water park	Mountain biking
Motorboat/Jet ski	Sports events - Participant	Biking/Road biking/Cycling
Special events/Festivals	Biking/Road biking/Cycling	Spa/health club

2018 Demographic Profile for Overnight Visitor Parties

	Coastal Region	Piedmont Region	Mountain Region
Average age of household head	44 years of age	44 years of age	46 years of age
Education of Household Head			
High school or less	11.6%	13.7%	11.4%
Some college - no degree	20.0%	18.4%	19.5%
Completed college	43.7%	44.1%	46.8%
Post Graduate College	24.7%	23.8%	22.3%
Employment of Household Head			
Employed	73.7%	67.9%	68.0%
Retired	14.5%	14.5%	19.9%
Not employed	11.8%	17.6%	12.1%
Annual Household Income			
Less than \$30,000	8.5%	11.1%	9.6%
\$30,000-\$49,999	11.9%	14.6%	18.0%
\$50,000-\$74,999	23.5%	17.9%	24.1%
\$75,000 & over	56.1%	56.4%	48.3%
Marital Status			
Married	66.5%	62.0%	64.3%
Never married	22.6%	27.0%	25.4%
Divorced, widowed, separated	10.9%	11.0%	10.3%
Ethnicity			
White	89.3%	78.3%	93.6%
Black/African American	4.7%	13.9%	1.3%
American Indian, Aleut Eskimo	0.3%	1.2%	0.5%
Asian or Pacific Islander	2.6%	4.2%	2.4%
Other	3.1%	2.4%	2.2%
Average Household Size	2.7 persons	2.7 persons	2.5 persons

2018 Top Advertising Markets

The top ten advertising markets for the three regions are very similar, but differences can be noted in the ranks. While Raleigh-Durham is the primary market for the Coastal Region, Charlotte is the primary market for the Piedmont and Mountain regions.

Coastal Region
Raleigh-Durham-Fayetteville (16.3%)
Charlotte (8.9%)
Greensboro-High Point-Winston Salem (7.3%)
Washington DC Metro (6.4%)
Richmond-Petersburg (5.7%)
Norfolk-Portsmouth-Newport News (5.3%)
New York (3.8%)
Philadelphia (3.7%)
Nashville (2.6%)
Johnstown-Altoona (2.1%)
Piedmont Region
Charlotte (10.8%)
Raleigh-Durham-Fayetteville (8.2%)
New York (7.1%)
Greenville-Spartanburg-Asheville (5.1%)
Greensboro-High Point-Winston Salem (4.7%)
Washington, DC (4.6%)
Atlanta, GA (3.9%)
Greenville-New Bern-Washington (2.7%)
Philadelphia (2.7%)
Wilmington (2.1%)
Mountain Region
Charlotte (14.3%)
Greenville-Spartanburg-Asheville (13.3%)
Atlanta, GA (13.1%)
Raleigh-Durham (Fayetteville) (8.4%)
Greensboro-High Point-Winston Salem (4.0%)
Tri-Cities, TN-VA (3.7%)
Columbia (2.9%)
Knoxville (2.9%)
New York (2.5%)
Tampa-St. Petersburg (2.3%)

Note: Advertising markets defined by Nielsen's Designated Market Area (DMA)

2018 North Carolina Regional Visitor Profile

Glossary of Terms

Travel	A trip over 50 miles one-way from home <i>or</i> any night away from home
Overnight Visitor	A visitor who spent at least one night away from home during travel
Daytripper	A visitor who did not spend any nights away from home, but traveled at least 50 miles one-way from home
Designated Market Area	Also referred to as a DMA and is a term used by Nielsen Media Research to identify an exclusive geographic area of counties in which the home market television stations hold a dominance of total hours viewed. There are 210 DMA's in the U.S.