

2015 North Carolina Visitor Profile

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



2015 North Carolina Visitor Profile

Visit North Carolina, formerly the North Carolina Division of Tourism, Film and Sports Development, has contracted with the research company TNS for data on North Carolina visitors since 2006. TNS is the world's largest provider of custom research and analysis, serving all segments of the travel industry. The company has over 13,000 full-time employees worldwide and offices in more than 80 countries.

The research program, titled "TravelsAmerica" 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 is 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 TravelsAmerica.

The purpose of this report is to profile the average North Carolina visitor, both overnight visitors and daytrippers. The report also includes comparisons between out-of-state and resident visitors where applicable. At the end of the report, an appendix offers definitions of key travel terms.

2015 North Carolina Visitor Profile

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2015 North Carolina Visitor Profile

Total Visitor Summary

- ◆ In 2015, approximately 54.6 million person-trips were taken in North Carolina and ranked #6 in the US in terms of domestic visitation.
- ◆ Eighty-seven percent of all domestic visitors came to North Carolina for pleasure purposes, while eleven percent of visitors came to conduct business (includes meeting/convention). The remaining two percent indicated “other” reason for visiting the state.
- ◆ The summer (June - August) was the most popular season for travel to North Carolina, with thirty percent of all 2015 visitors. Spring (March-May) followed with nearly twenty-seven percent of the annual visitors. The fall (September - November) season welcomed twenty-three percent of visitors and winter (December-February) saw twenty percent of visitors in 2015. July was the single largest month for travel to the state with nearly twelve (11.7%) percent, followed by August (9.9%) and March (9.1%).
- ◆ More than fifty-three percent of North Carolina overnight visitors lodged in a hotel/motel, while thirty-five percent stayed in a private home. Eight percent stayed in a rental home or condo, while three percent stayed in a personal second home or condo. Three percent stayed in an RV park or campground.
- ◆ The average travel party size for all North Carolina visitor parties was 2.2. Twenty-eight percent of travel parties to the state included children in the party.
- ◆ Ninety percent of all travelers to the state drove (includes personal automobile, rental, motorcycle and RV), while seven percent traveled by air.
- ◆ In 2015, the average household trip expenditure by visitors to North Carolina was \$500. The average household trip expenditure for overnight visitors was \$628. Daytrip parties to the state spent approximately \$131 per visit.
- ◆ The top states of origin of *total* visitors to North Carolina were in-state residents (48.4%), Virginia (7.7%), South Carolina (6.8%), Georgia (6.5%), Florida (3.1%), Pennsylvania (2.7%), New York (2.6%), Maryland (2.3%), Ohio (2.1%) and Tennessee (2.1%).
- ◆ Twenty-eight percent of the households that traveled to North Carolina in 2015 had a household income over \$100,000. The average household income for all visitors was \$80,270.
- ◆ In 2015, Raleigh/Durham/Fayetteville (16.3%) was the top advertising market of origin for *all* travelers to the state, followed by Charlotte (11.4%), Greenville-Spartanburg-Asheville (7.7%), Greensboro/High Point/Winston Salem (6.1%), Greenville-New Bern-Washington (5.9%), Atlanta (4.8%), Washington, DC (3.4%), New York (3.3%), Wilmington (3.2%), and Norfolk-Portsmouth-Newport News (2.5%).

2015 North Carolina Overnight Visitor Profile

Summary

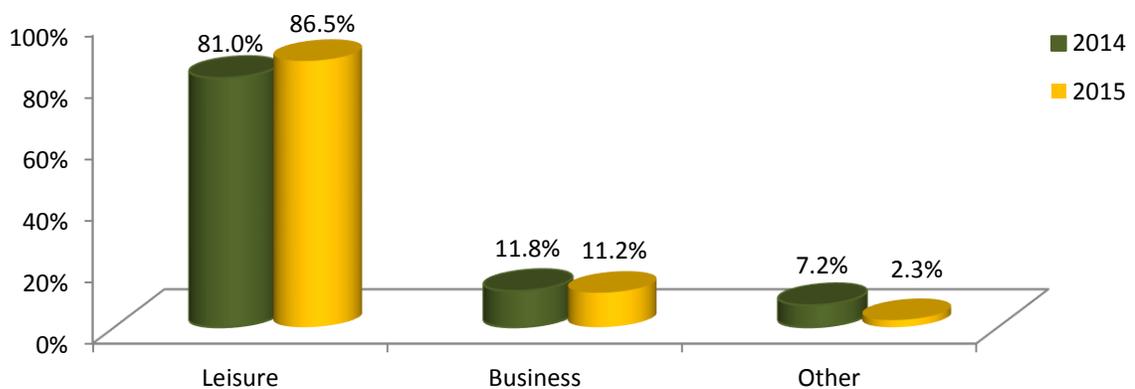
- ◆ In 2015, approximately 43 million overnight person-trips were taken in North Carolina. North Carolina ranked #7 in the US in terms of domestic overnight visitation.
- ◆ Eighty-seven percent of all domestic overnight visitors came to North Carolina for leisure purposes, while eleven percent of visitors came to conduct business (includes meeting/convention). The remaining two percent indicated “other” reason for visiting the state.
- ◆ The summer (June - August) was the most popular season for overnight travel to North Carolina, with thirty-one percent of all 2015 overnight visitors. Spring (March-May) followed with twenty-six percent of visitors. The fall (September - November) and winter (December-February) seasons saw twenty-three percent and twenty percent of annual visitors respectively. July was the single largest month for overnight travel to the state with nearly thirteen percent, followed by May, June and August each with more than nine percent of the annual visitors.
- ◆ Overnight visitors to North Carolina spent an average of 3 nights in the state in 2015. This was an increase from 2.8 nights in 2014.
- ◆ More than fifty-three percent of North Carolina overnight visitors lodged in a hotel/motel, while thirty-five percent stayed in a private home. Eight percent stayed in a rental home or condo, while three percent stayed in a personal second home or condo. Three percent stayed in an RV park or campground.
- ◆ The average travel party size for all overnight North Carolina visitor parties was 2.2 people. Twenty-eight percent of overnight travel parties to the state included children in the party.
- ◆ Eighty-eight percent of overnight travelers to the state drove (includes personal automobile, rental, motorcycle and RV), while nine percent traveled by air.
- ◆ In 2015, the average household trip expenditure for overnight visitors was \$628. Resident overnight visitors spent an average of \$404 and out-of-state overnight visitors spent an average of \$772.
- ◆ The top states of origin of *overnight* visitors to North Carolina were in-state residents (39.0%), Virginia (8.4%), Georgia (8.2%), South Carolina (5.3%), Florida (3.9%), Pennsylvania (3.6%), New York (3.3%), Maryland (3.2%), Ohio (2.7%) and Tennessee (2.6%).
- ◆ Forty-nine percent of the households that traveled overnight to North Carolina in 2015 had a household income over \$75,000, and nearly a third (31.2%) of them had an income of over \$100,000. The average annual income of overnight visitors to the state was \$83,780.
- ◆ In 2015, Raleigh/Durham/Fayetteville (13.5%) was the top advertising market of origin for *overnight* travelers to the state, followed by Charlotte (9.1%), Greenville-Spartanburg-Asheville (6.3%), Atlanta (5.9%), Washington, DC (4.6%), Greensboro/High Point/Winston Salem (4.3%), New York (4.2%) and Greenville-New Bern-Washington (4.0%).

North Carolina Overnight Visitor Profile

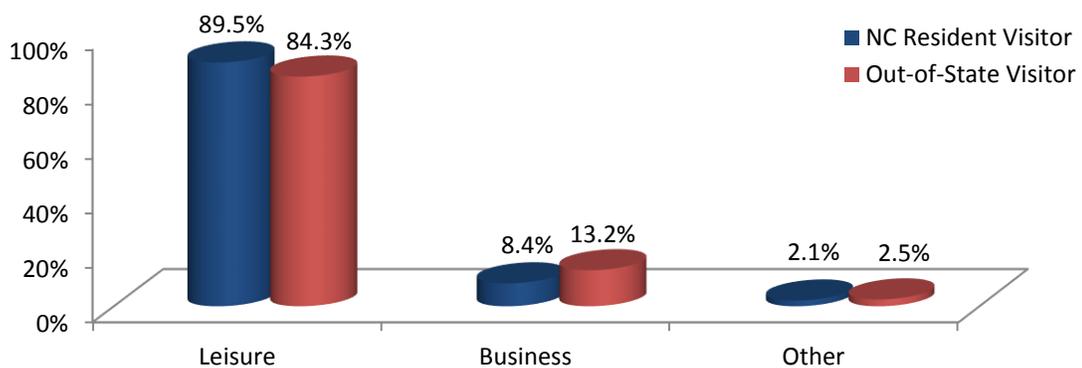
Main Purpose of Visit

In 2015, more than eight out of ten (86.5%) of domestic overnight visitors came to North Carolina for leisure purposes, which included visiting friends and relatives, outdoor recreation and entertainment/sightseeing. Eleven percent (11.2%) of overnight visitors came for general business, convention, seminar or other group meeting, while two percent traveled to the state for “other” reasons. While North Carolina has a strong history of being a leisure travel state, the proportion increased from eighty-one percent in 2014 to more than eighty-six percent in 2015.

Primary Purpose of Overnight Trip to North Carolina



**2015 Primary Purpose of Overnight Trip
NC Resident Vs. Out-of-State Visitor**

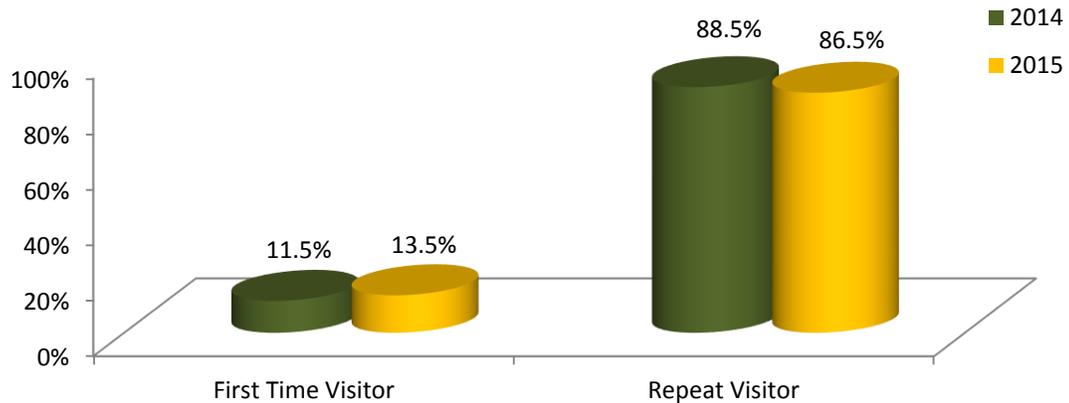


Resident travelers are slightly more likely to be leisure visitors than out-of-state overnight visitors to North Carolina. Nearly ninety percent of NC residents traveling overnight in North Carolina in 2015 were leisure visitors while eighty-four percent of out-of-state visitors were leisure visitors. Thirteen percent of out-of-state visitors in 2015 indicated that their primary purpose of visit was business.

First Time Visitors

In 2015, more than thirteen percent of overnight visitors were first time visitors to the state, up slightly from nearly twelve percent in 2014. More than two-thirds (67.2%) have visited more than three times in the last 5 years.

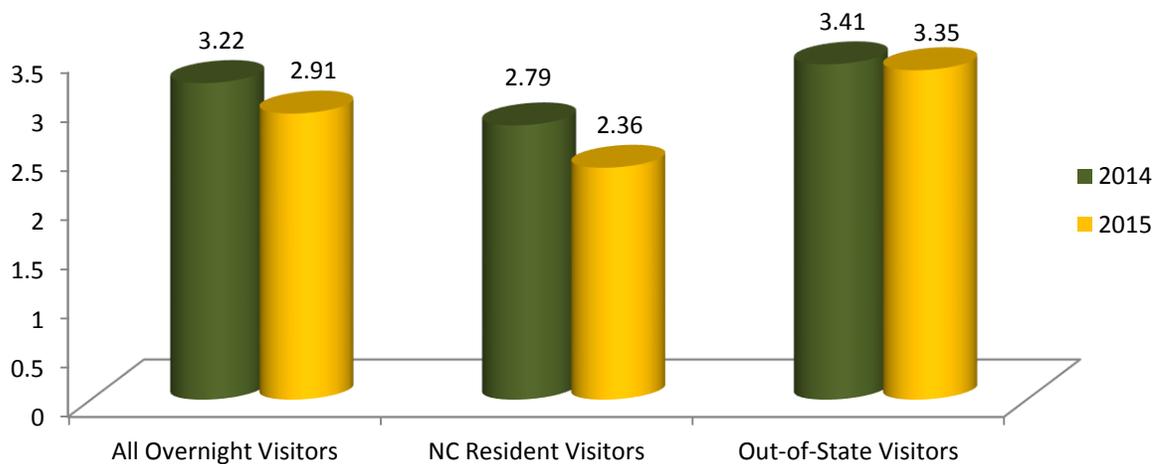
2015 First Time Overnight Visitors to North Carolina



Average Length of Stay

The average length of stay for all North Carolina visitors decreased slightly from 2014 to 2015, mainly due to resident length of stay shortening somewhat over that time period. Length of stay by out-of-state overnight visitors remained at 3.4 nights in 2015.

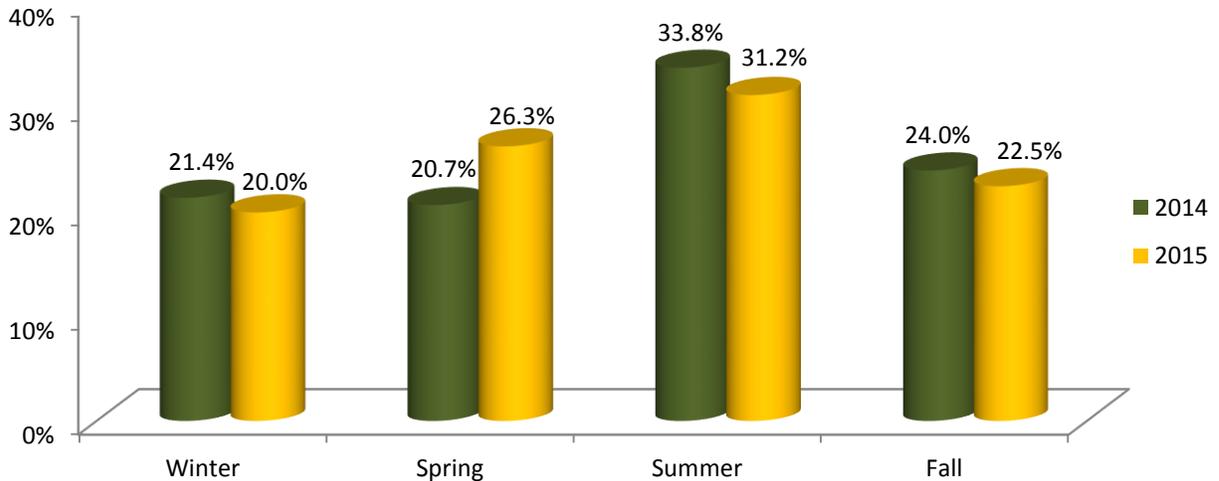
Average Length of Stay for Overnight Visitors to North Carolina



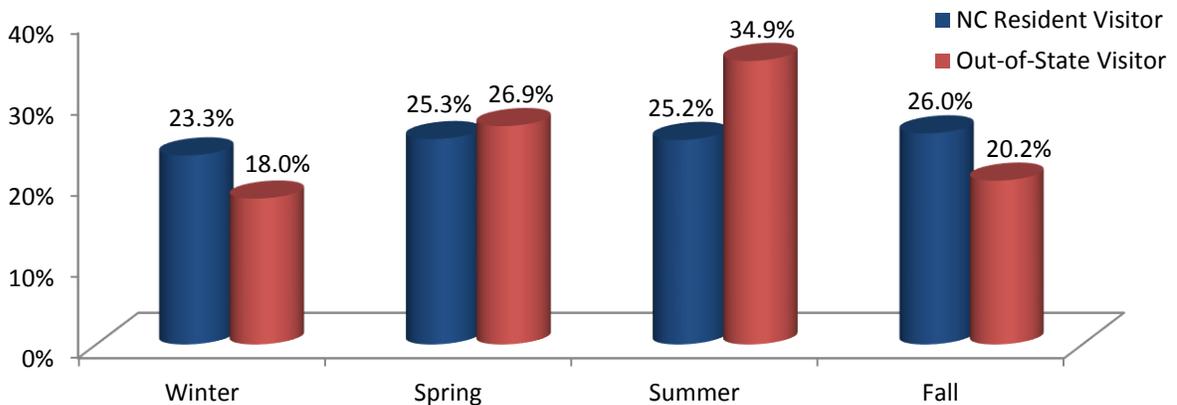
Travel Volume by Season

When examining overnight visitation based on the typical seasonal schedule, the summer (June through August) with thirty-one percent was the most popular season for overnight travel to North Carolina. Spring (March through May) was the next most popular travel season (26%) for overnighters, followed by fall (September through November) with nearly twenty-three percent and winter (December through February) with twenty percent of overnight visitors.

Overnight Travel by Season to North Carolina



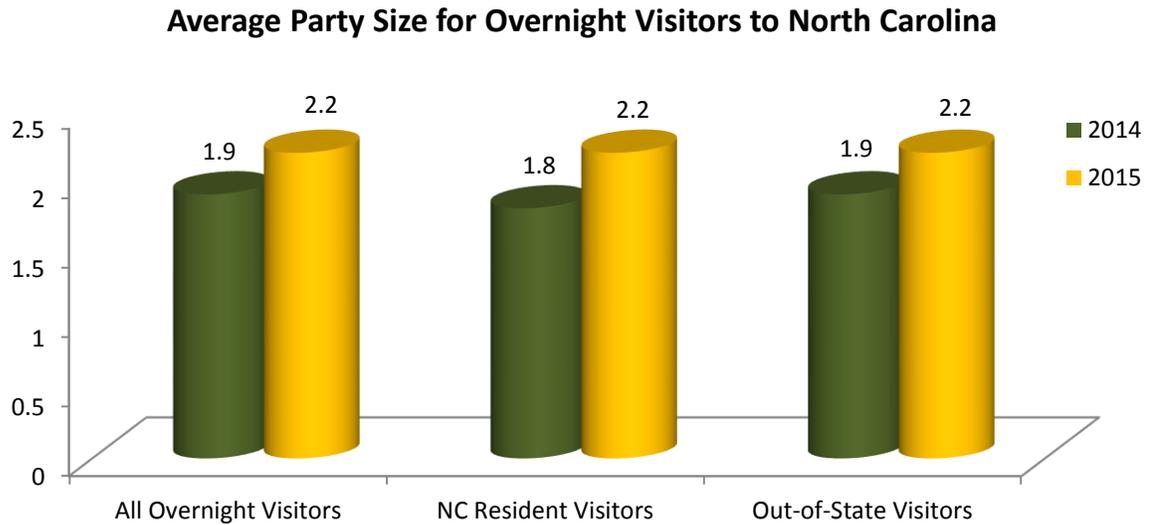
**Overnight Travel by Season to North Carolina
NC Resident Vs. Out-of-State Visitor**



While summer is the most popular season for out-of-state visitors to travel to the state, the fall season welcomed the largest proportion of resident travelers with twenty-six percent. Spring and summer each attracted a quarter of the resident visitors within the state. Out-of-state visitors are slightly more likely to travel in the spring (27%) than fall (20%) or winter (18%).

Travel Party Size

The average travel party size for all North Carolina overnight visitor parties increased from 2014 to 2015, as both out-of-state visitor parties and resident visitor parties in 2015 were more likely to include children in travel parties than in 2014.



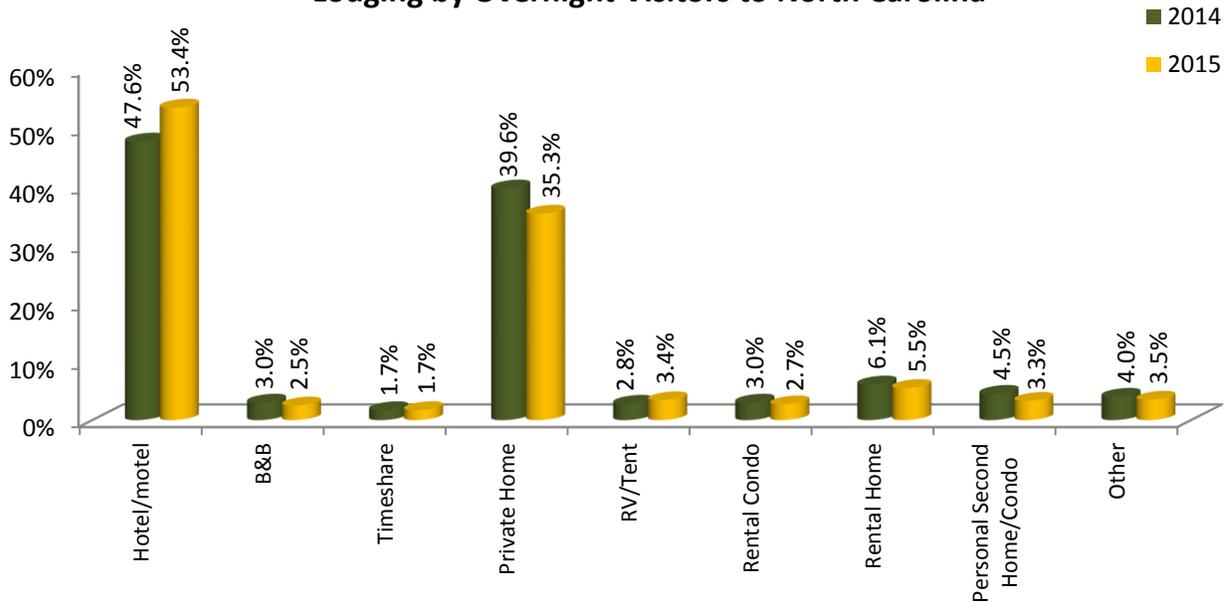
Children on Trip

Twenty-eight percent of all overnight visitor parties to North Carolina included children, up from twenty-three percent in 2014. The average number of children on trips was consistent at 1.8, but a higher proportion of parties traveled with children. Resident visitor parties are slightly more likely to include children than out-of-state visitor parties (31% vs. 26%).

Lodging Used in North Carolina

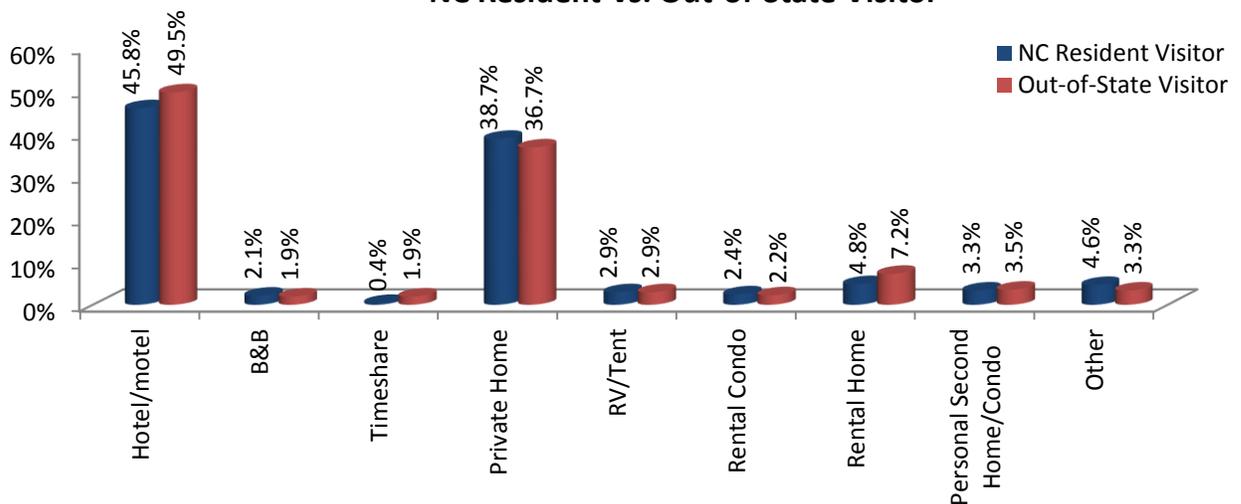
In 2015, more than half of North Carolina visitors lodged in a hotel/motel, up from forty-eight percent in 2014. Thirty-five percent stayed in a private home, down slightly from 2014. The other categories of accommodations showed little change from 2014.

Lodging by Overnight Visitors to North Carolina



*percentages add to more than 100% due to multiple responses

**Lodging by Overnight Visitors to North Carolina
NC Resident Vs. Out-of-State Visitor**

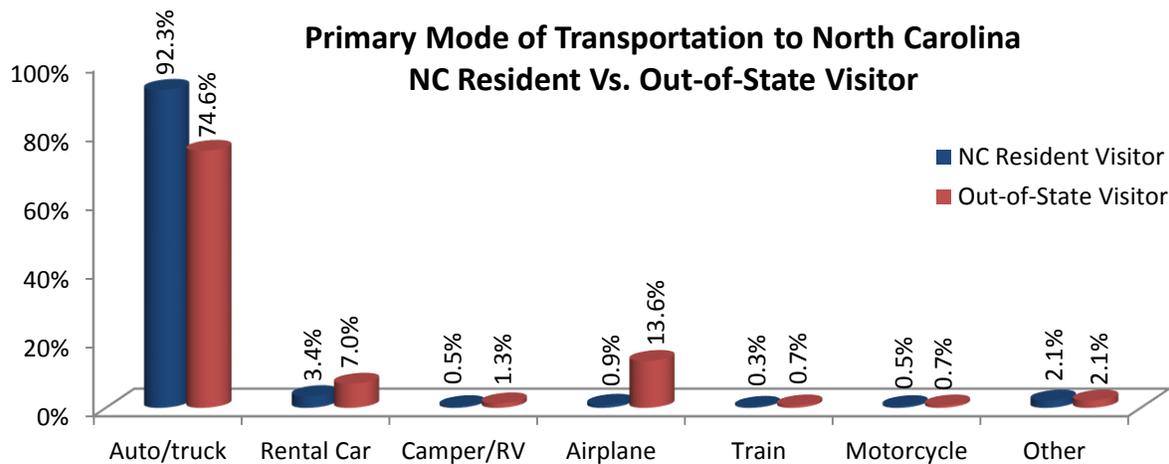
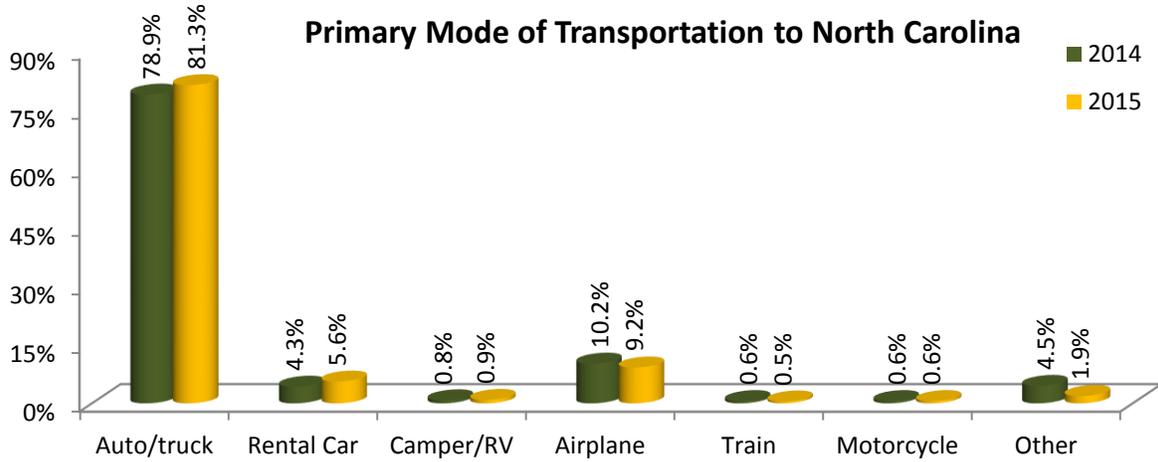


*percentages add to more than 100% due to multiple responses

Out-of-state visitors are more likely to use a hotel/motel and rental homes as accommodations than resident visitors. Resident visitors are more likely to stay in a private home than out-of-state visitors.

Mode of Transportation

The primary mode of transportation by overnight visitors to North Carolina has remained consistent with the personal auto being the dominant form of transportation (81.3%), while about nine percent travel by air.

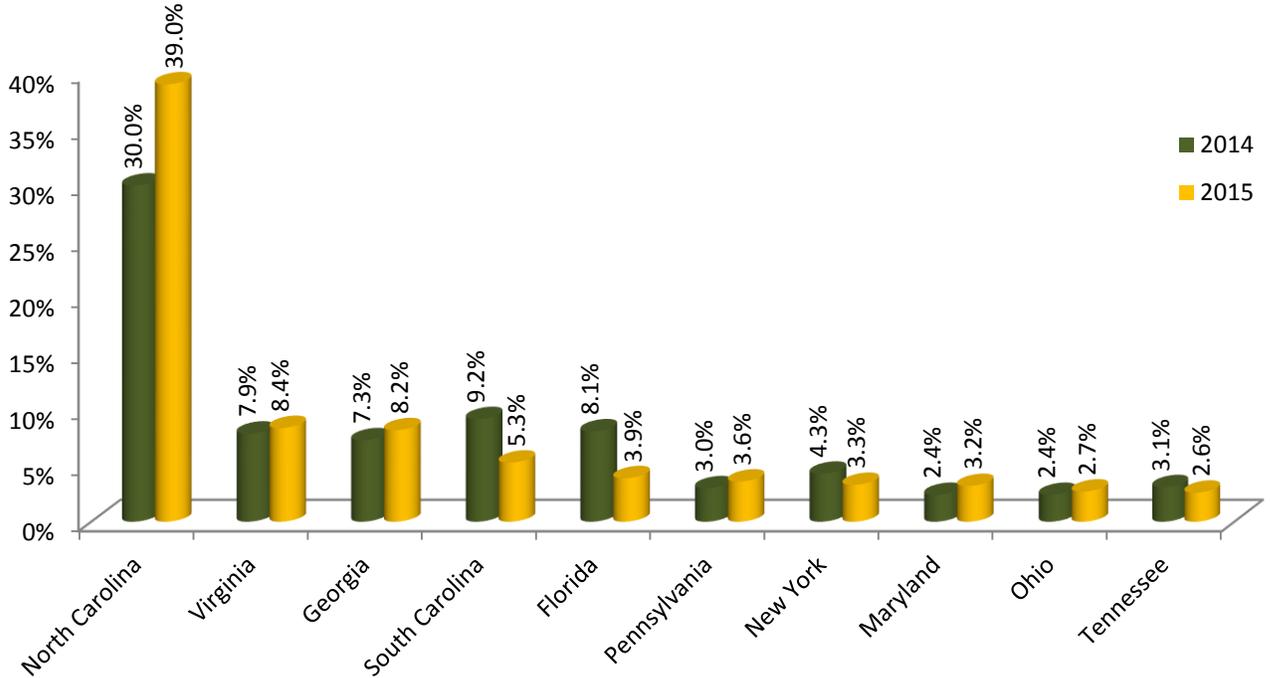


Not surprisingly, NC resident visitors are more likely to use their own automobile as primary transportation for overnight travel within the state than out-of-state visitors. While out-of-state visitors also primarily drive to North Carolina, they are more likely to fly than resident visitors.

Origin of Visitors

In 2015, the top states of origin for North Carolina overnight visitors included North Carolina (39.0%), Virginia (8.4%), Georgia (8.2%), South Carolina (5.3%), Florida (3.9%), and Pennsylvania (3.6%). Visitation share from South Carolina decreased from nine percent in 2014 to five percent in 2015. The top ten out-of-state markets represent forty-three percent of North Carolina overnight visitors in terms of origin.

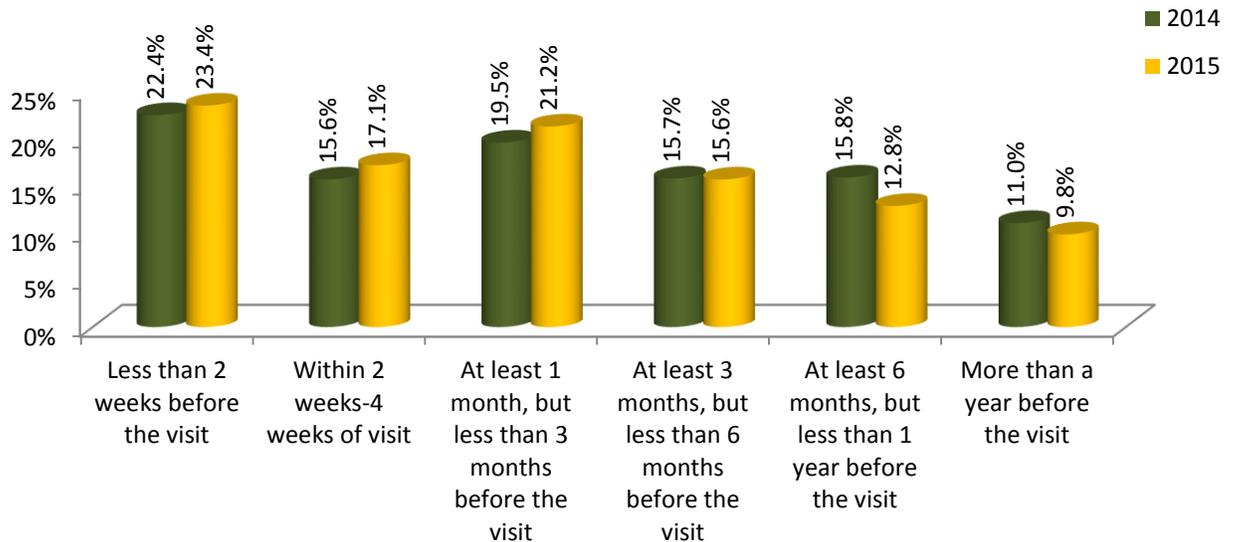
Top States of Origin of Overnight Visitors to North Carolina



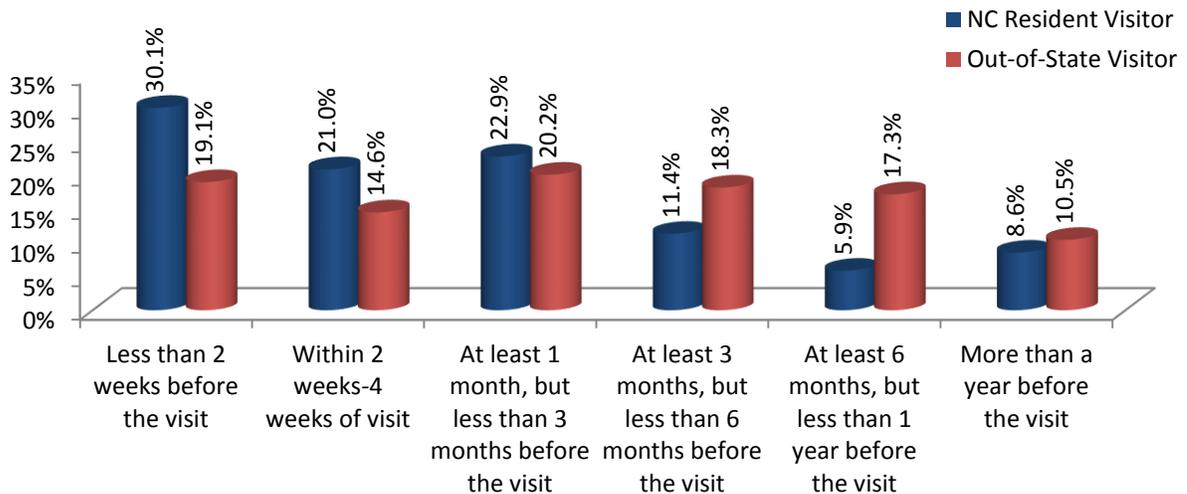
Trip Planning

Nearly one-quarter of 2015 overnight visitors considered North Carolina for a visit at least six months before the visit and ten percent considered the state more than a year before visiting. Consideration time for travel to the state appears to have shortened only slightly in 2015. Twenty-seven percent of North Carolina overnight visitors considered the state at least six months prior to travel in 2014, while twenty-three percent did so in 2015.

How Far in Advance Overnight Visitors Consider Travel to North Carolina



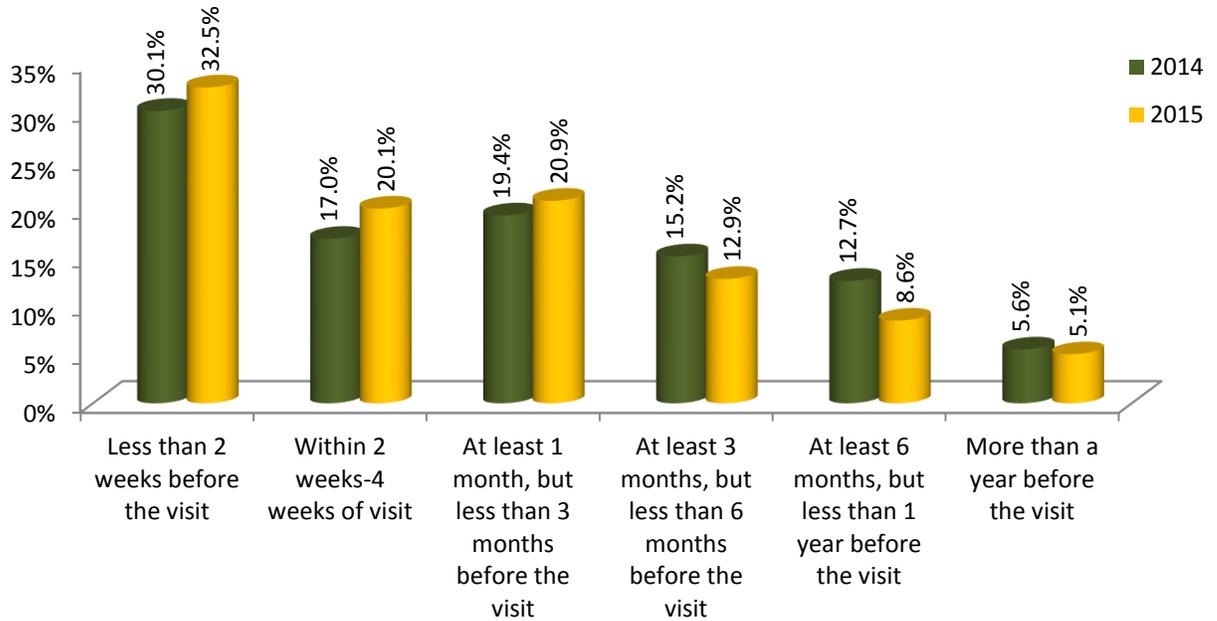
**How Far in Advance Overnight Visitors Consider Travel to North Carolina
NC Resident Vs. Out-of-State Visitor**



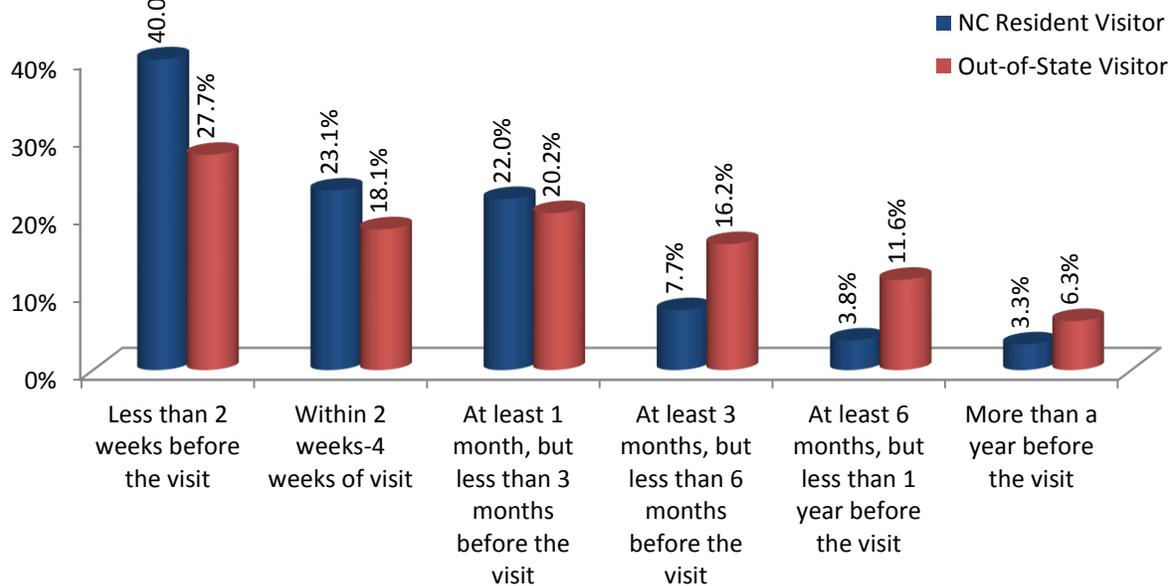
Resident visitors are nearly twice as likely to have North Carolina in the “consideration” set less than two weeks before visiting as out-of-state visitors. Out-of-state visitors are more likely to consider the state at least one month prior to travel and nearly twice as likely to consider North Carolina more than six months prior to travel.

Nearly fourteen percent of overnight visitors made the decision to visit the state at least six months prior to the visit, while more than thirty percent of overnight visitors made the decision within two weeks of visiting.

How Far in Advance Overnight Visitors Made Decision to Travel to North Carolina



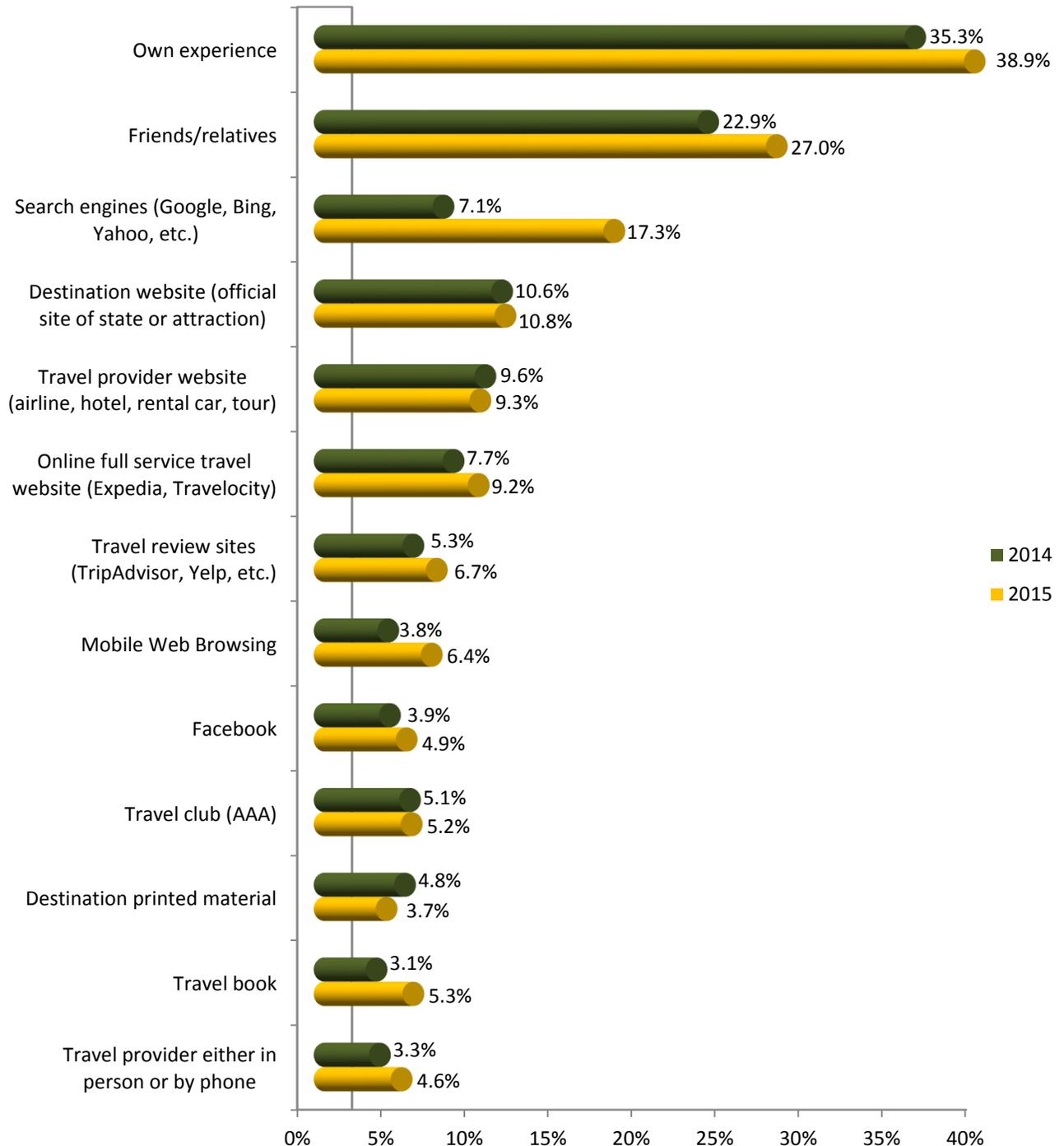
**How Far in Advance Overnight Visitors Made Decision to Travel to North Carolina
NC Resident Vs. Out-of-State Visitor**



Resident visitors are much more likely to make the decision to visit North Carolina within two weeks of travel than out-of-state visitors. More than thirty-four percent of out-of-state visitors decide to visit at least three months prior to visit, while fifteen percent of resident visitors decide to visit at least three months prior to travel.

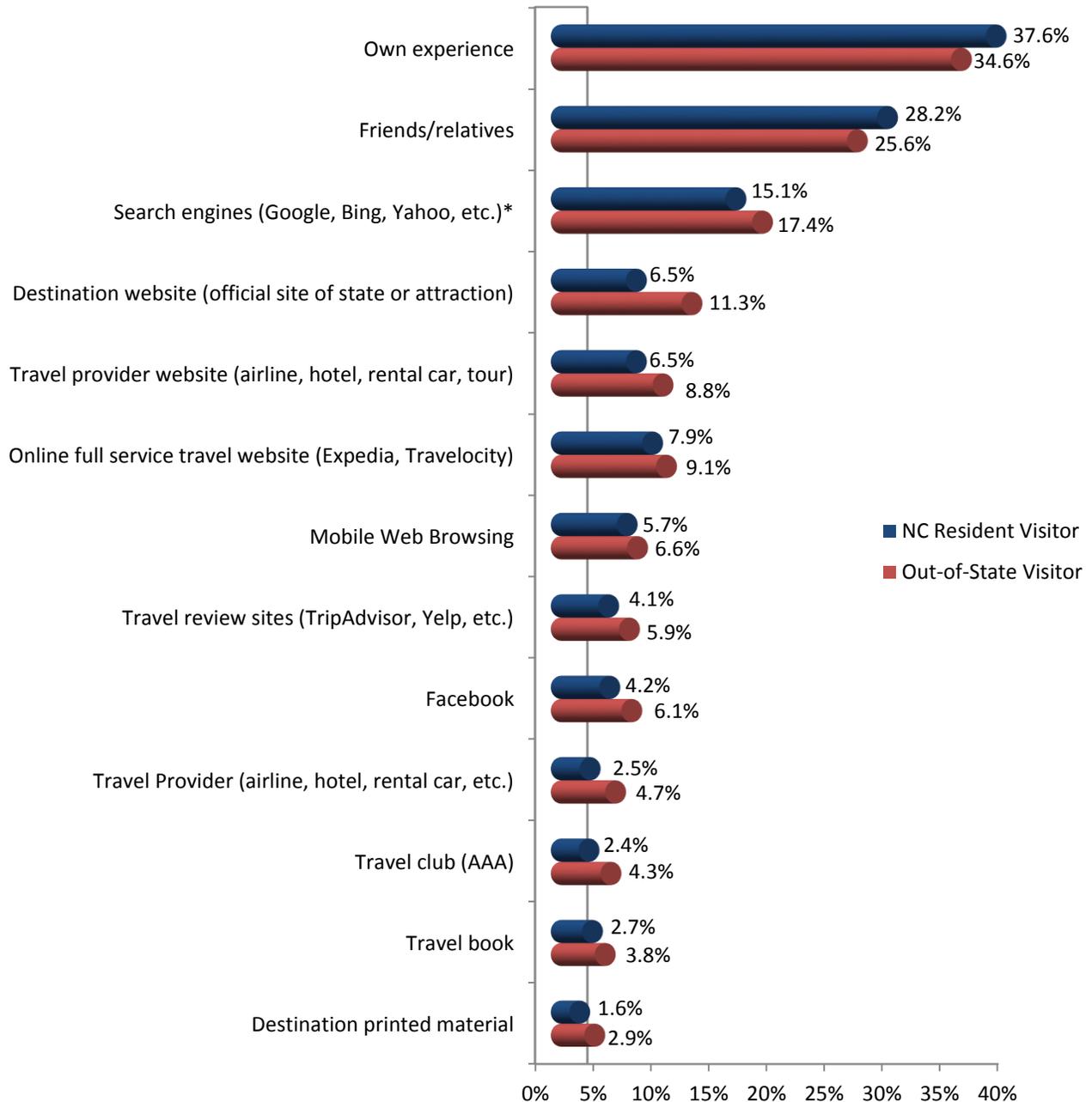
A larger proportion of overnight visitors to North Carolina in 2015 used search engines, mobile web browsing and friends/relatives to plan their trips than in 2014, as well as their own experience. The top sources of information for trip planning are personal experience, friends/relatives, search engines and destination websites.

Top Sources of Information for Trip Planning



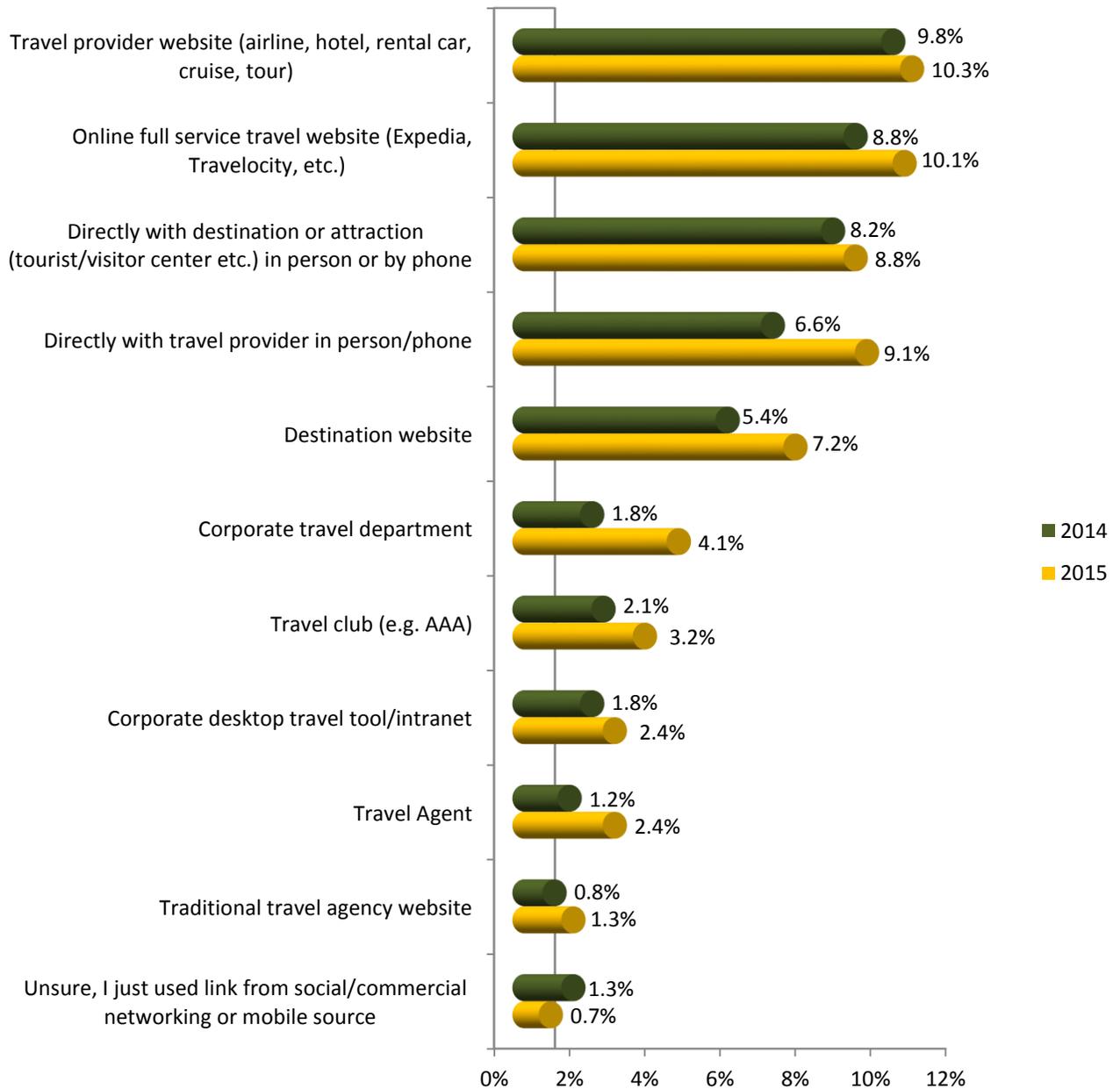
Out-of-state visitors tend to use more sources of information overall than resident visitors. They are more likely to rely on sources of all kinds, with the exception of their own experience and friends/relatives, than resident visitors to North Carolina.

Top Sources of Information for Trip Planning NC Resident Visitor Vs. Out-of-State Visitor



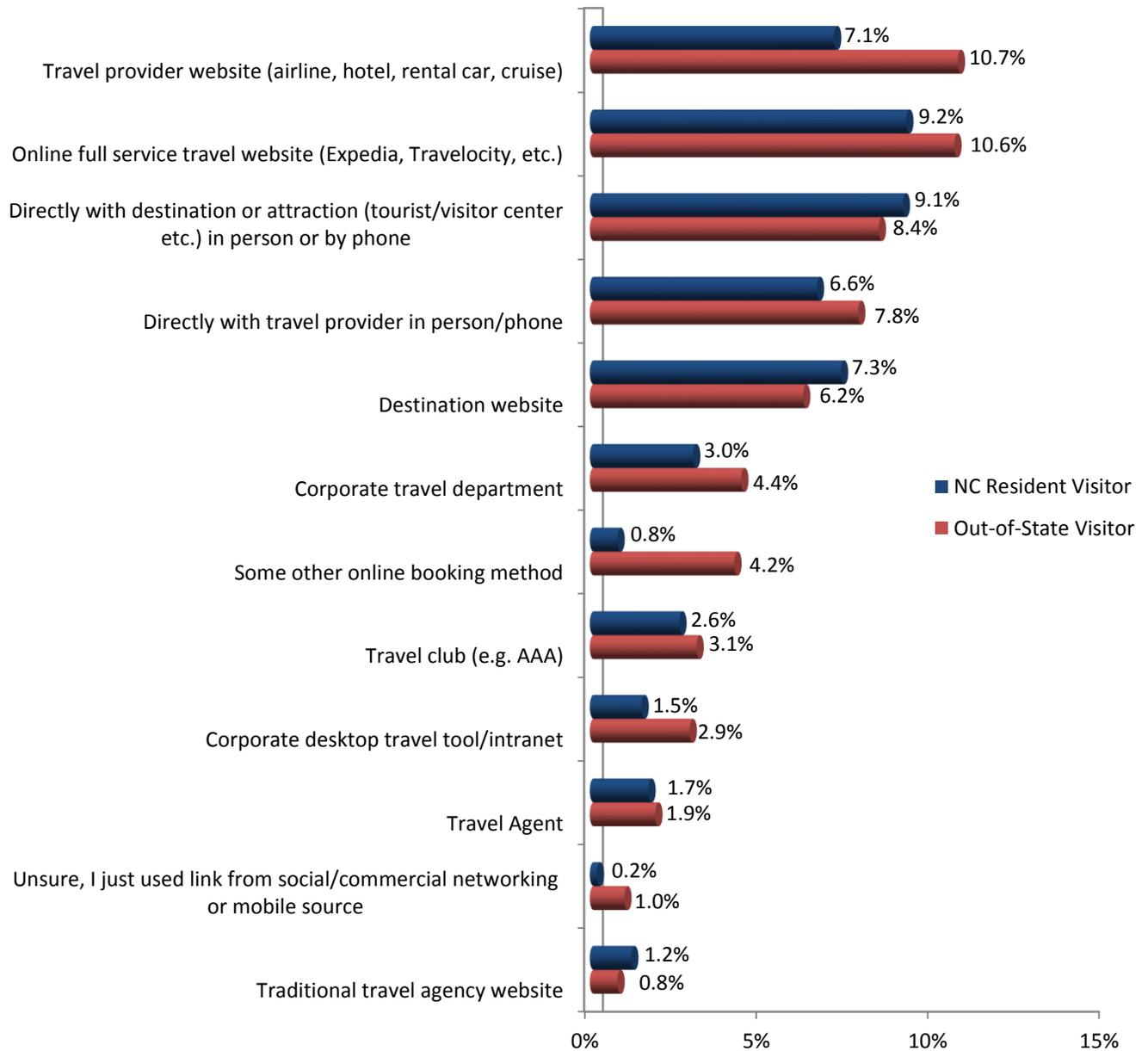
The proportion of overnight visitors booking travel through travel provider websites, online full service travel websites (Expedia or Travelocity) and direct bookings increased from 2014 to 2015. Other top methods of booking travel continue to be destination and travel provider websites and travel departments.

Top Methods of Booking Travel



Out-of-state visitors are much more likely to use travel provider websites, full service online travel websites, destination websites and by directly contacting travel providers than resident travelers. The most common method of booking travel by resident visitors in 2015 was via online full service travel website or by contacting the destination directly.

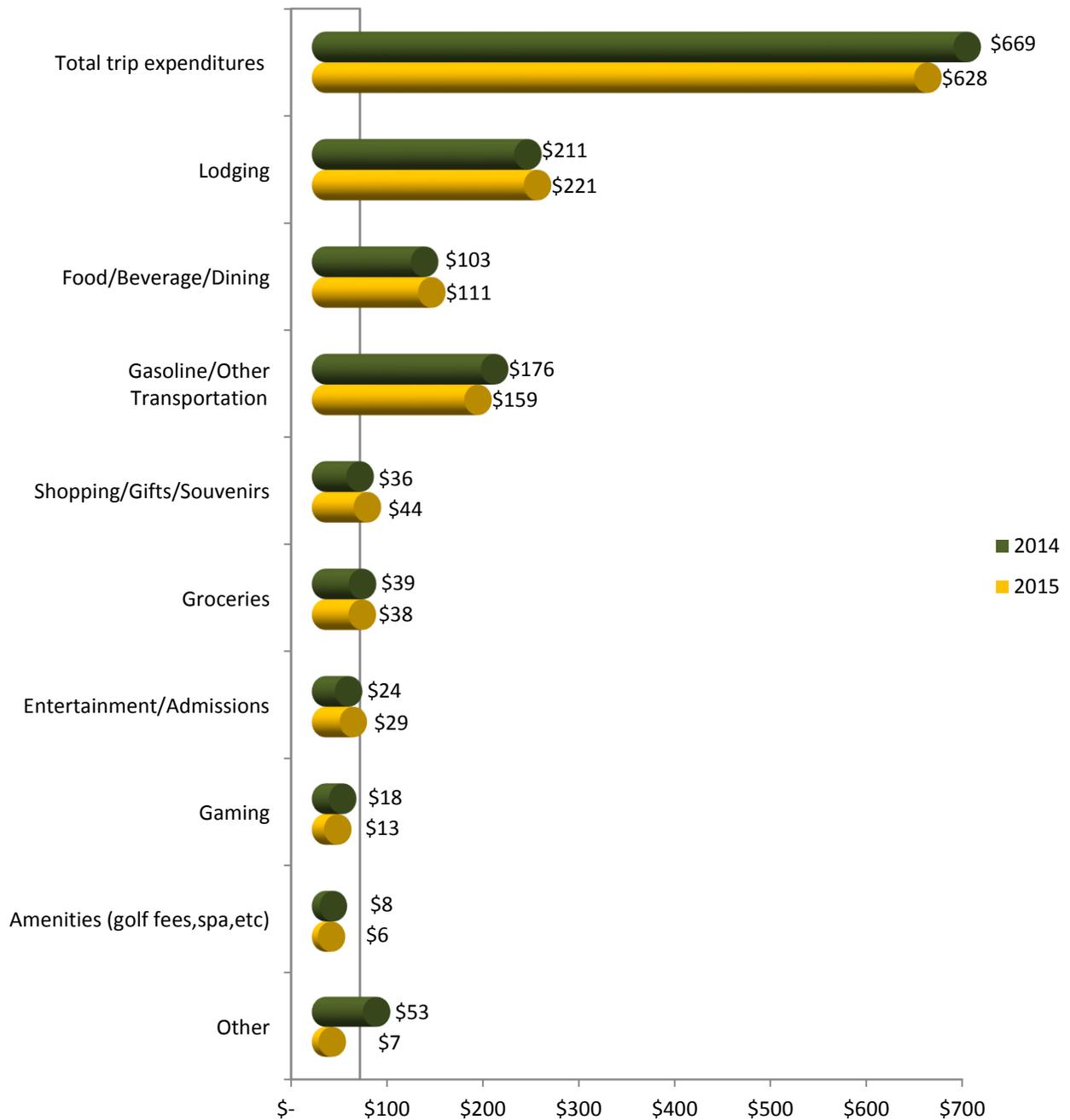
Top Methods of Booking Travel NC Resident Visitor Vs. Out-of-State Visitor



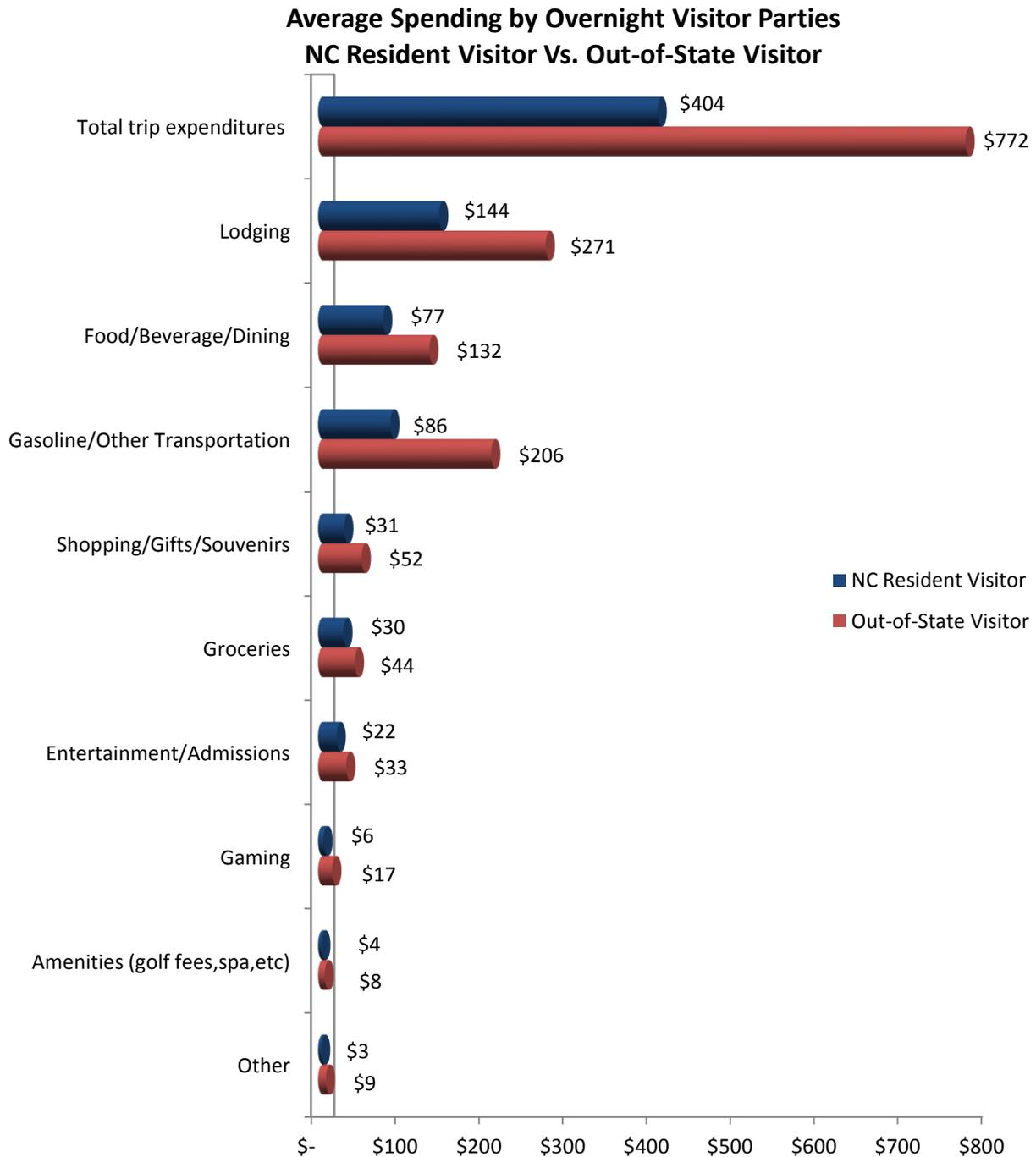
Expenditures by North Carolina Visitors

The average overnight visitor party spending in the state was \$628, down five percent from 2014. Spending in nearly all expenditure categories grew. The decrease in transportation expenses, due to lower gasoline prices, was the main factor in the decreased average total spending.

Average Spending by Overnight Visitor Parties



Out-of-state visitors to North Carolina spend sixty-three percent more on average per trip than resident visitors, particularly in the categories of lodging, gasoline/transportation and food/beverage.



Activities

More than one-quarter (29%) of 2015 overnight visitors to North Carolina visited relatives while in the state. About one-fourth shopped (26%) and nearly one-fifth visited friends (19%) while traveling overnight in North Carolina. Activities that showed largest increases in the proportion of overnight visitors participating from 2014 to 2015 included shopping (+5 percentage points), fine dining (+4 percentage points), state parks (+4 percentage points), and urban sightseeing (+4 percentage points). **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

Activity	2014	2015	Activity	2014	2015
Visiting Relatives	35%	29%	Nature Travel/Eco-touring	3%	3%
Shopping	21%	26%	Bird Watching	3%	2%
Visiting Friends	17%	18%	Theme Park/Amusement Park/Water Park	3%	2%
Beach	18%	16%	Golf	3%	2%
Fine Dining	12%	16%	Spa/Health Club	1%	2%
Rural Sightseeing	13%	15%	Sports events – Major/Professional	1%	2%
Historic Sites/Churches	9%	11%	Horseback riding	1%	2%
Urban Sightseeing	7%	11%	Native American ruins/Rock art	1%	2%
State Park/Monument/Recreation area	5%	9%	Musical Theater	1%	2%
Museums	7%	8%	Farms/Ranches/Agri-tours	1%	2%
Old Homes/Mansions	6%	7%	Biking/Road Biking/Cycling	2%	1%
Wildlife Viewing	7%	7%	Rafting/Kayaking/Canoeing/Paddleboarding	2%	1%
National Park/Monument/Recreation area	3%	5%	Area where a TV show or movie was filmed	1%	1%
Fishing	3%	5%	Theater/Drama	2%	1%
Gardens	3%	5%	Motorboat/Jet ski	1%	1%
Casino/Gaming	3%	5%	Sport Event- Youth/Amateur/Collegiate/Other(Participant)	<1%	1%
Local/folk arts/crafts	3%	5%			
Other nature (photography, rockhounding, etc.)	2%	5%	Sailing	<1%	1%
Craft Breweries	3%	4%	Symphony/opera/concert	1%	1%
Art Galleries	4%	4%	ATV/Four-wheeling	1%	1%
Sport Event- Youth/Amateur/Collegiate/Other(Spectator)	1%	4%	Rock/Mountain climbing	1%	1%
Zoos/Aquariums/Aviaries	4%	4%	Motor Sports	1%	1%
Hiking/Backpacking	4%	4%	Rodeo/State Fair	<1%	1%
Nightclubs/Dancing	4%	4%	Scuba diving/snorkeling	1%	1%
Special Events/Festivals	3%	3%	Distilleries	1%	1%
Wine Tasting/Winery Tour	3%	3%	Skiing/snowboarding	1%	1%
Musical performance/show	1%	3%	Horsereading	<1%	1%

Resident and out-of-state visitors behave similarly with regards to activities participated in while traveling to and within North Carolina. A somewhat larger proportion of resident visitors are likely to visit friends, visit the beach and visit historic sites while traveling in-state than out-of-state visitors. A larger proportion of out-of-state visitors are likely to participate in shopping, rural sightseeing and fine dining than resident visitors.

**Activities Participated in by 2015 Overnight Visitors to North Carolina
NC Resident Vs. Out-of-State Visitors**

Activity	NC Resident	Out-of-State Visitor	Activity	NC Resident	Out-of-State Visitor
Shopping	21%	30%	Golf	3%	2%
Visiting Relatives	28%	30%	Bird Watching	3%	2%
Fine Dining	12%	18%	Spa/Health Club	1%	2%
Rural Sightseeing	11%	17%	Sports events – Major/Professional	2%	2%
Visiting Friends	23%	15%	Farms/Ranches/Agri-tours	2%	2%
Beach	19%	14%	Theater/Drama	1%	1%
Urban Sightseeing	12%	11%	Musical Theater	3%	1%
Historic Sites/Churches	13%	10%	Biking/Road Biking/Cycling	2%	1%
State Park/Monument/Recreation area	10%	9%	Rafting/Kayaking/Canoeing/Paddleboarding	1%	1%
Museums	8%	8%	Sport Event- Youth/Amateur/Collegiate/Other(<u>Participant</u>)	2%	1%
Wildlife Viewing	7%	7%	Motor Sports	<1%	1%
Old Homes/Mansions	8%	6%	Area where a TV show or movie was filmed	1%	1%
National Park/Monument/Recreation area	5%	6%	Sailing	2%	1%
Gardens	4%	6%	Native American ruins/Rock art	2%	1%
Casino/Gaming	3%	5%	Horseback riding	2%	2%
Local/folk arts/crafts	5%	5%	ATV/Four-wheeling	2%	1%
Other nature (photography, rockhounding, etc.)	5%	5%	Skiing/snowboarding	2%	1%
Fishing	5%	5%	Water skiing		1%
Craft Breweries	4%	5%	Motorboat/Jet ski	2%	1%
Zoos/Aquariums/Aviaries	4%	4%	Symphony/opera/concert	1%	1%
Art Galleries	4%	4%	Distilleries	<1%	1%
Wine Tasting/Winery Tour	2%	4%	Horsereading	1%	<1%
Hiking/Backpacking	4%	4%	Hunting	1%	<1%
Nightclubs/Dancing	5%	3%	Mountain biking	2%	<1%
Special Events/Festivals	2%	3%	Caverns	1%	<1%
Theme Park/Amusement Park/Water Park	2%	3%	Rodeo/State Fair	2%	<1%
Nature Travel/Eco-touring	3%	2%	High School/College reunion	1%	<1%
Musical performance/show	4%	2%	Rock/Mountain climbing	3%	<1%
Sport Event- Youth/Amateur/Collegiate/Other(<u>Spectator</u>)	6%	2%	Scuba diving/snorkeling	2%	<1%

Demographic Profile of North Carolina Overnight Visitors

Nearly two-thirds (64.4%) of the overnight visitors to North Carolina are married and ten percent of the region's visitors are divorced, widowed or separated. A larger proportion of out-of-state visitors to the state are currently married (67%) than resident visitors (60%). Eleven percent of out-of-state visitors are divorced, widowed or separated, while nine percent of resident visitors are divorced, widowed or separated.

The largest proportion of North Carolina overnight visitors, both resident and out-of-state, classify themselves as white (85%). Nine percent classify themselves as black/African American, up slightly from seven percent in 2014. Three percent of overnight visitors self-report their ethnicity is Asian/Pacific Islander.

Nearly two-thirds (64.6%) of North Carolina overnight visitor parties have a household head with a college degree or higher. The average overnight visitor is 45 years old. Sixty-two percent of resident visitors have a household head with a college degree or higher, while sixty-six percent of out-of-state visitors have a college degree or higher. The NC resident overnight visitor is slightly younger (42 years old) than the out-of-state overnight visitor (47 years old). The average North Carolina overnight visitor has 16.7 vacation days each year.

The average household income of overnight visitors to North Carolina in 2015 was \$83,780, up from \$74,400 in 2014. Forty-nine percent reporting a household income \$75,000 or more. Nearly nineteen percent had a household income of over \$125,000. The average household income of resident overnight visitors was \$79,160 in 2015, while the average household income of out-of-state overnight visitors was \$86,610.

More than sixty percent (62.7%) of overnight visitor parties reported that the head of household is employed, while twenty-two percent are retired. The remainder reported "not employed" as work status. Out-of-state visitors (25%) are slightly more likely to be retired than resident visitors (16%).

The average household size of a North Carolina overnight visitor party in 2015 was 2.7, up from 2.4 in 2014. This was the case for both in-state and out-of-state visitors.

2015 Top Advertising Markets

In 2015, the top advertising markets sending overnight visitors to **North Carolina** were Raleigh-Durham-Fayetteville (13.5%), Charlotte (9.1%), Greenville-Spartanburg-Asheville (6.3%), Atlanta (5.9%), Washington DC (4.6%), Greensboro-Winston-Salem-High Point (4.3%), New York (4.2%) and Greenville-New Bern-Washington (4.0%). Advertising markets correspond with Nielsen's Designated Market Areas (DMAs).

Top Advertising Markets of Origin for North Carolina *Overnight* Visitors

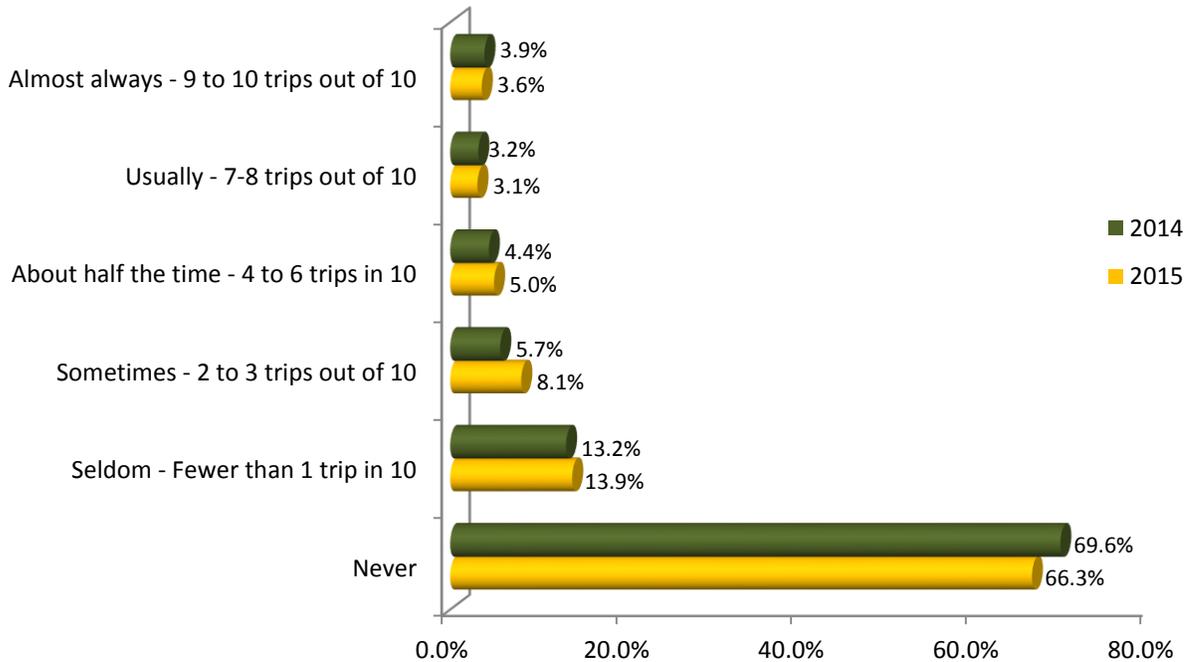
DMA of Origin	2014 Percentage of Total Overnight Visitors	2015 Percentage of Total Overnight Visitors
Raleigh-Durham (Fayetteville)	12.5%	13.5%
Charlotte	9.7%	9.1%
Greenville-Spartanburg-Asheville-Anderson	3.9%	6.3%
Atlanta	6.3%	5.9%
Washington DC (Hagerstown, MD)	2.9%	4.6%
Greensboro-High Point-Winston Salem	7.7%	4.3%
New York, NY	3.4%	4.2%
Greenville-New Bern-Washington	2.3%	4.0%
Wilmington	1.8%	3.1%
Norfolk-Portsmouth-Newport News	2.5%	2.3%
Philadelphia, PA	1.5%	2.2%
Richmond-Petersburg, VA	2.0%	1.6%
Myrtle Beach-Florence	1.4%	1.6%
Boston (Manchester)	0.8%	1.5%
Baltimore	1.6%	1.4%
Roanoke/Lynchburg, VA	2.4%	1.4%
Augusta, GA	0.6%	1.3%
Tri-Cities, TN-VA	0.7%	1.2%
Nashville	0.7%	1.1%
Orlando-Daytona Beach-Melbourne	1.3%	1.0%
Cleveland	0.9%	1.0%
Columbia, SC	2.2%	1.0%
Chattanooga	0.7%	1.0%

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

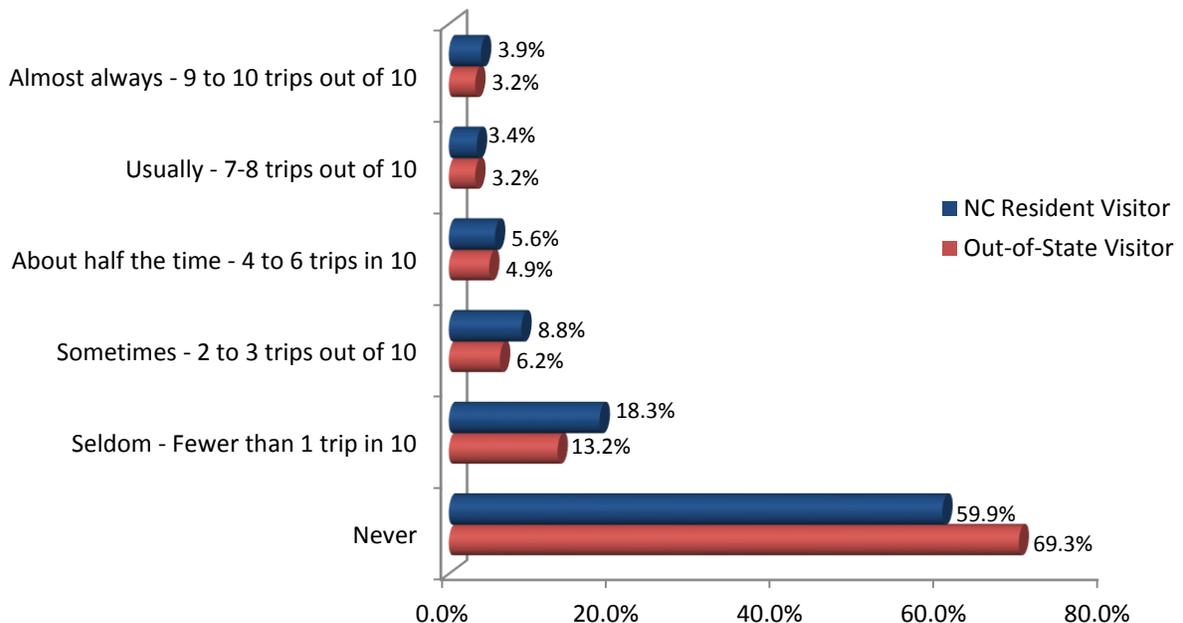
Vacation Attitudes

The majority of overnight visitors to North Carolina do not travel with pets. Those who do travel with pets only do so less than half of the time. Resident visitors were more likely to travel with a pet than out-of-state visitors in 2015.

How Often Do You Take Leisure Trips with your Pets?

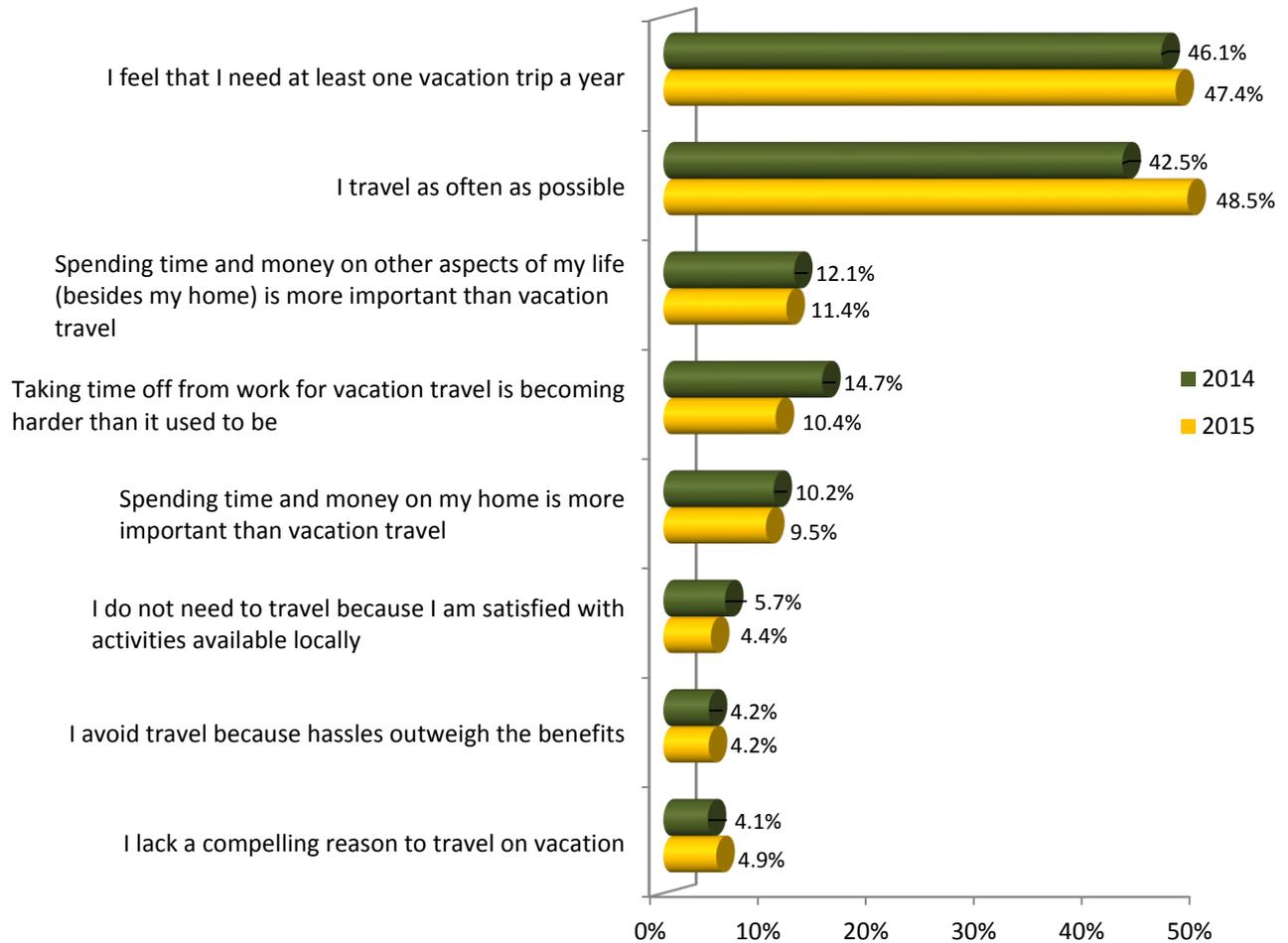


How Often Do You Take Leisure Trips with your Pets?



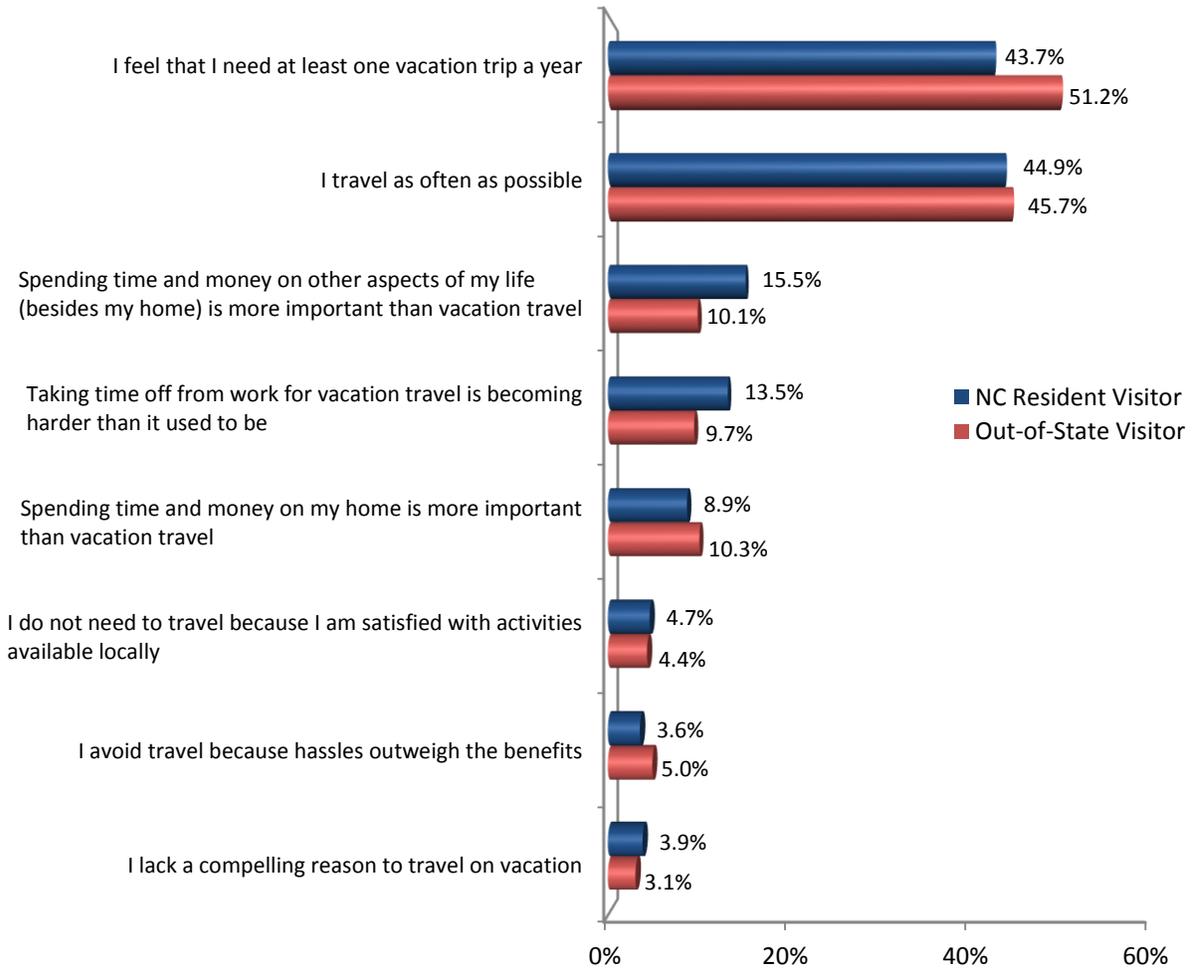
Half of North Carolina overnight visitors feel they need at least one vacation a year, up from 2014. Nearly half indicate that they travel as often as possible.

Current Feelings Concerning Vacation Travel



North Carolina out-of-state visitors are more likely to report that they need at least one vacation trip a year than resident visitors. However, resident visitors more often note that it is harder to take time off work than it used to be.

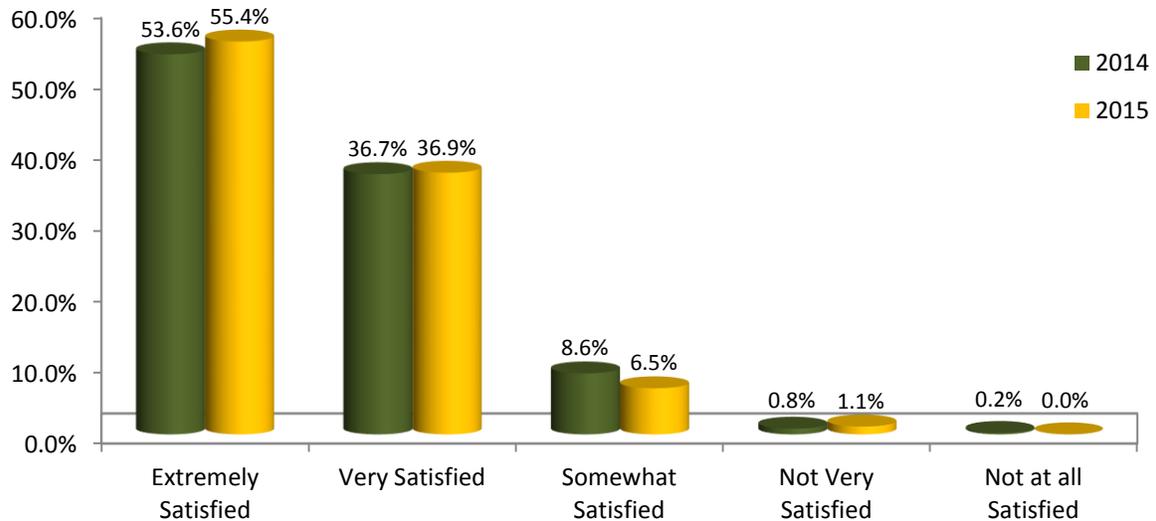
Current Feelings Concerning Vacation Travel NC Resident Visitor Vs. Out-of-State Visitor



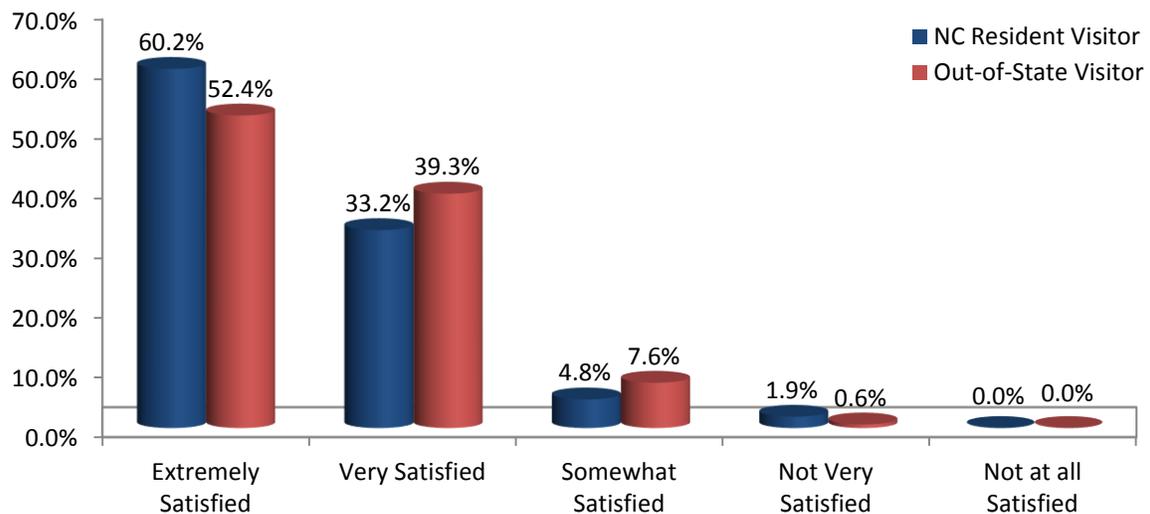
Satisfaction with Overnight Visits to North Carolina

Ninety-two percent of overnight visitors to North Carolina in 2015 were either very or extremely satisfied with their visit, and the proportion of those visitors who were extremely satisfied increased from fifty-four percent to nearly fifty-five percent. Both resident and out-of-state visitors express high satisfaction with their visits to and within North Carolina.

Satisfaction with Overnight Visit to North Carolina



**Satisfaction with Overnight Visit to North Carolina
NC Resident Visitor Vs. Out-of-State Visitor**



2015 North Carolina Daytrip Visitor Profile

Summary

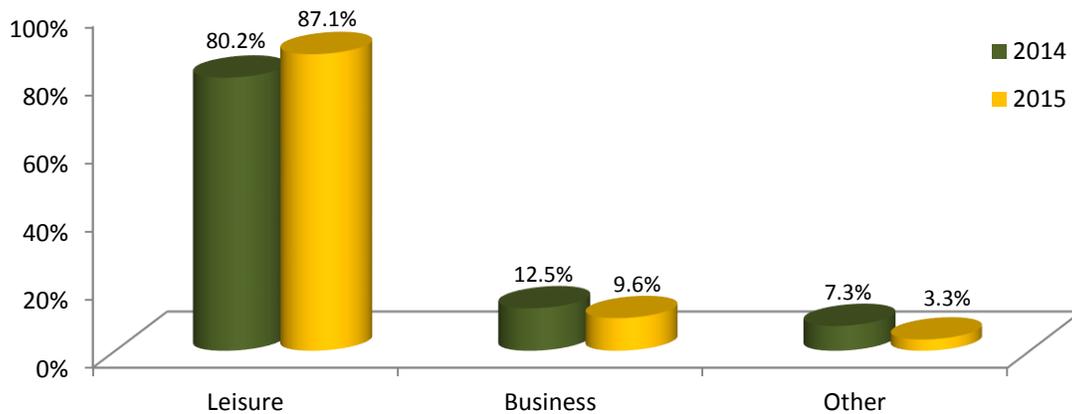
- ◆ In 2015, approximately 11.7 million daytrips were taken in North Carolina. North Carolina ranked #8 in the US in terms of daytrip visitation. A daytripper is defined as a visitor who did not spend any nights away from home, but traveled at least 50 miles one-way from home.
- ◆ Eighty-seven percent of all daytrippers visited North Carolina for pleasure purposes, while nearly ten percent of visitors came to conduct business (includes meeting/convention). The remaining respondents indicated an “other” reason for visiting the state.
- ◆ The spring (March-May) was the most popular season for day travel to North Carolina, with twenty-eight percent of all 2015 daytrippers, followed by summer (June - August) with twenty-six percent, fall (September - November) with twenty-five percent and winter (December-February) with twenty-one percent. March was the single largest month for day travel to the state with more than twelve percent, followed by July with eleven percent.
- ◆ The average travel party size for daytrip visitor parties to North Carolina was 2.1 people. Twenty-seven percent of travel parties to the state included children in the party.
- ◆ Ninety-seven percent of daytrippers to the state drove (includes personal automobile, rental, motorcycle and RV).
- ◆ In 2015, the average household trip expenditure for daytrip parties to the state was approximately \$131 per visit, up slightly from \$125 in 2014.
- ◆ The top states of origin of *daytrippers* to North Carolina were in-state residents (72.7%), and the nearby states of South Carolina (10.7%), Virginia (5.7%), Georgia (2.4%), Florida (1.2%) and Tennessee (0.9%).
- ◆ More than half (60.1%) of the households that traveled to North Carolina on a daytrip in 2015 had a household income over \$50,000.
- ◆ In 2015, Raleigh/Durham/Fayetteville (23.0%) was the top advertising market of origin for *daytrippers* to the state, followed by Charlotte (17.5%), Greenville-Spartanburg-Asheville (11.8%), Greensboro/High Point/Winston Salem (11.0%), and Greenville-New Bern-Washington (11.0%).

North Carolina Daytrip Visitor Profile

Main Purpose of Visit

In 2015, eighty-seven percent of daytrippers visited North Carolina for leisure purposes, which included visiting friends and relatives, outdoor recreation and entertainment/sightseeing. The proportion of daytrippers who visited for general business, convention, seminar or other group meeting dropped from nearly thirteen percent in 2014 to nearly ten percent in 2015.

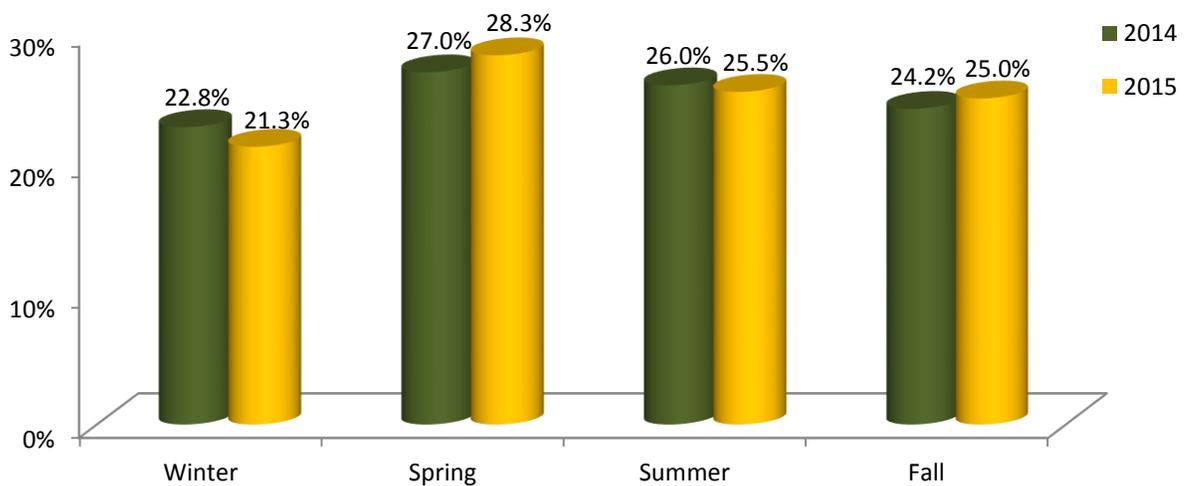
Primary Purpose of Daytrip to North Carolina



Travel Volume by Season

Daytrip travel to and within North Carolina during the spring months increased in 2015, with more than twenty-eight percent of annual daytrippers visiting during that season. The other three seasons welcomed between twenty and twenty-five percent of daytrippers.

Daytrip Travel by Season to North Carolina



Travel Party Size

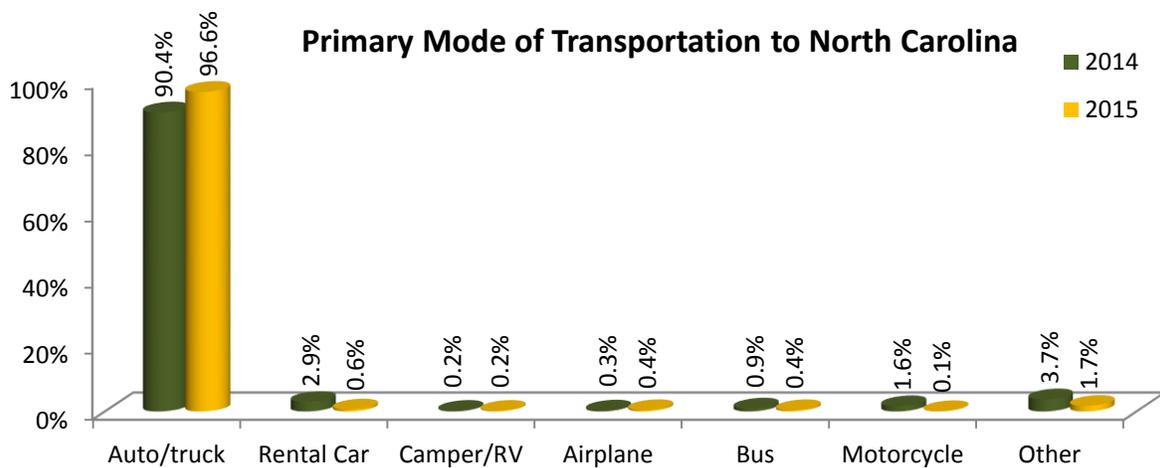
The average travel party size for North Carolina daytrippers in 2015 was 2.1 people, up slightly from 1.9 in 2014.

Children on Trip

Twenty-seven percent of daytrip parties to North Carolina included children. Among those who traveled with children, the average number of children on trips was 1.7.

Mode of Transportation

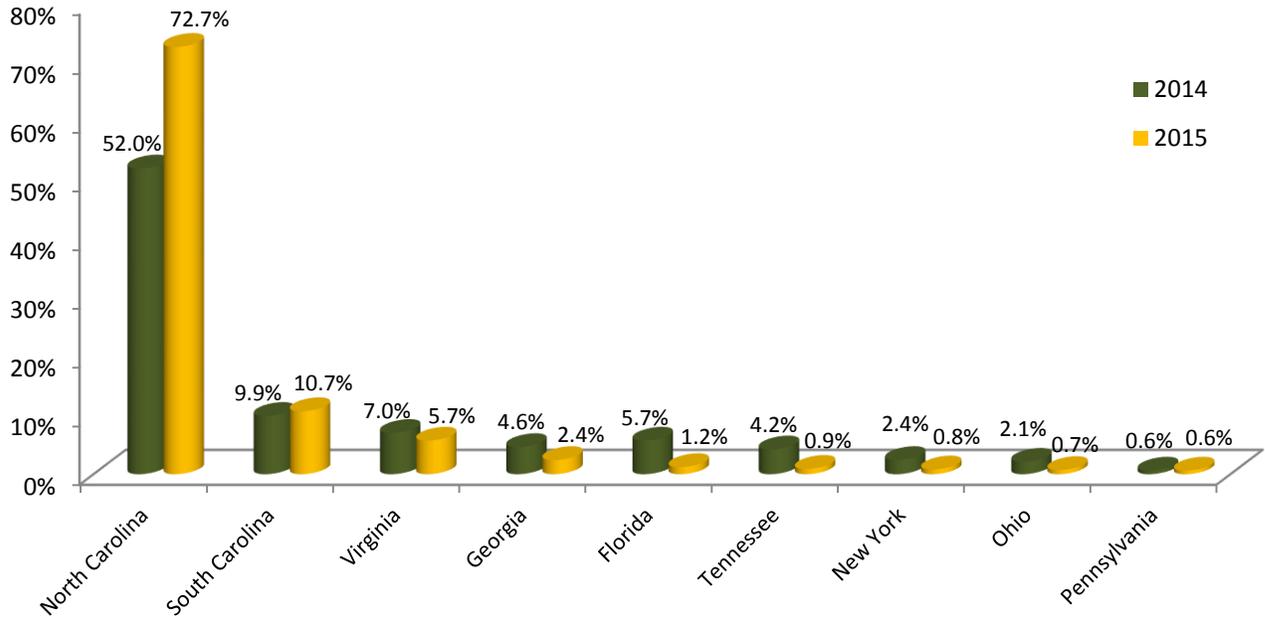
The primary mode of transportation by daytrippers to North Carolina is the personal auto (96.6%), while less than four percent of daytrippers choose an alternate form of transportation.



Origin of Visitors

As expected, the top states of origin for North Carolina daytrippers were residents and those from nearby states; North Carolina (72.7%), South Carolina (10.7%), Virginia (5.7%) and Georgia (2.4%).

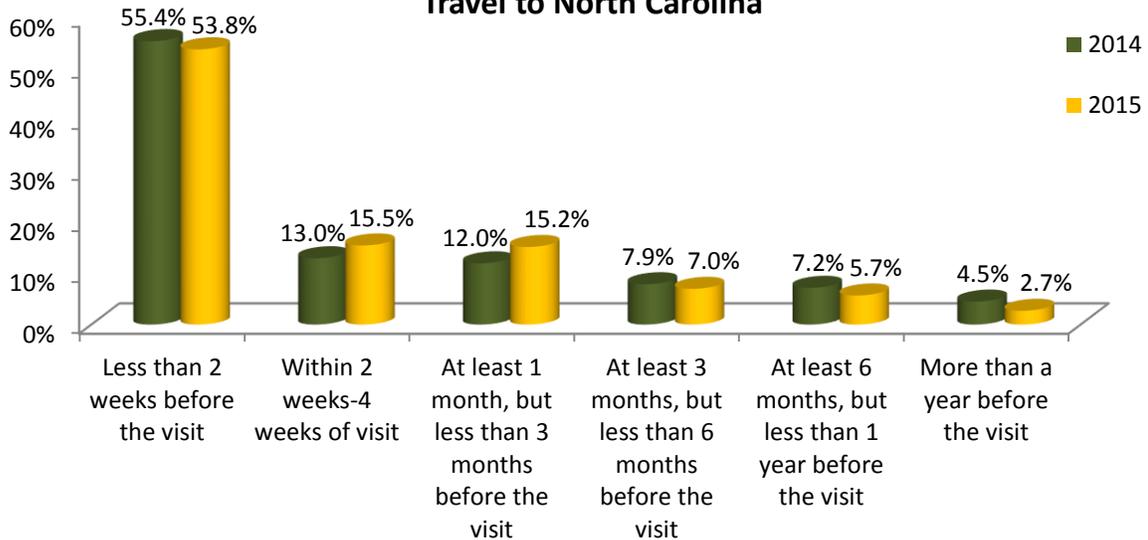
Top States of Origin of Daytrippers to North Carolina



Trip Planning

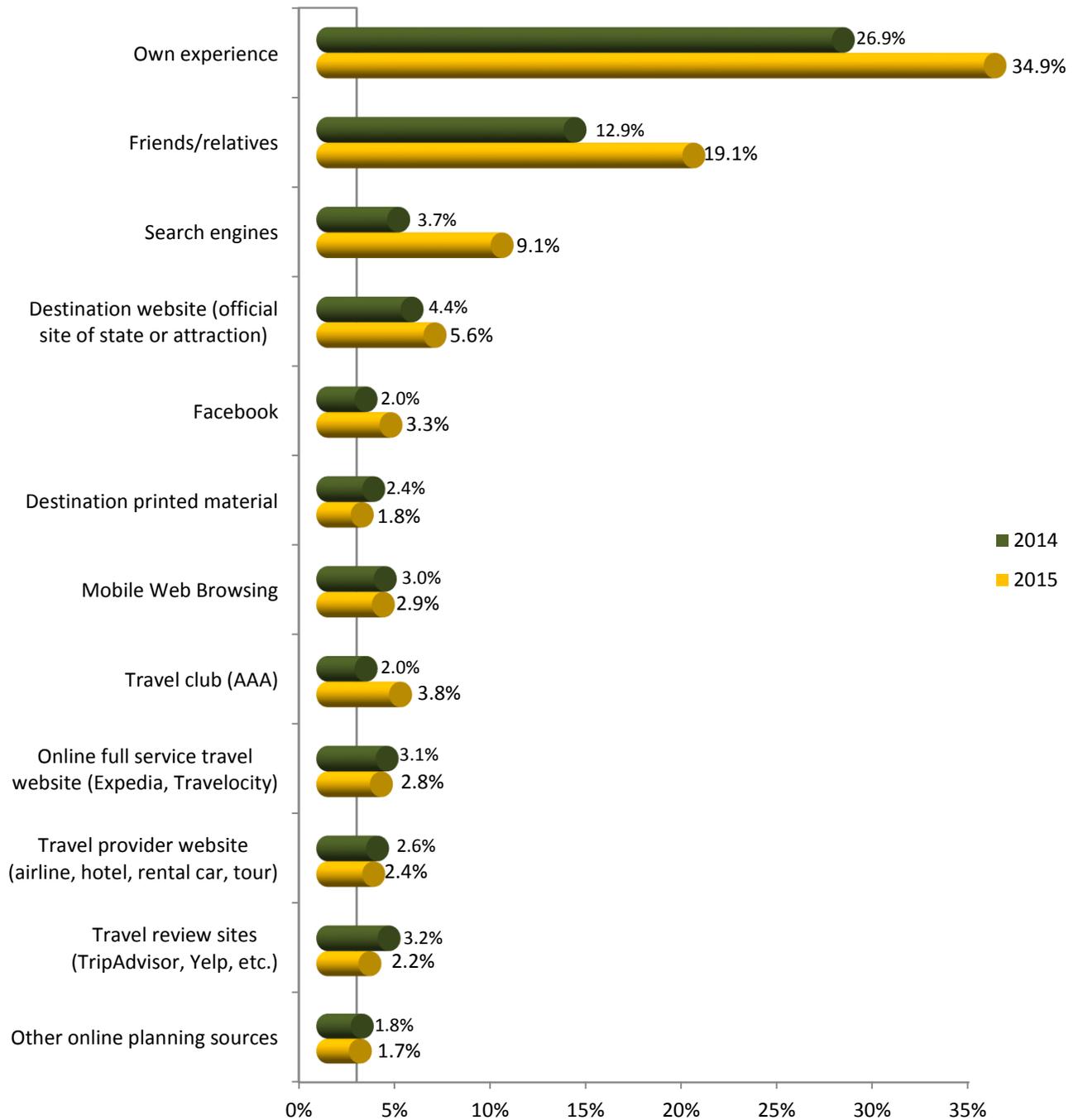
Not surprisingly, daytrippers to and within North Carolina planned their visits within a shorter timeframe than overnighters. More than half of 2015 daytrip visitors made the decision to visit North Carolina less than two weeks before the visit.

How Far in Advance Daytrippers Visitors Made the Decision to Travel to North Carolina



The top source of information for daytrip planning in North Carolina is personal experience, followed by friends/relatives, search engines and official destination websites. Facebook and destination printed materials ranked fourth and fifth in terms of daytrip planning.

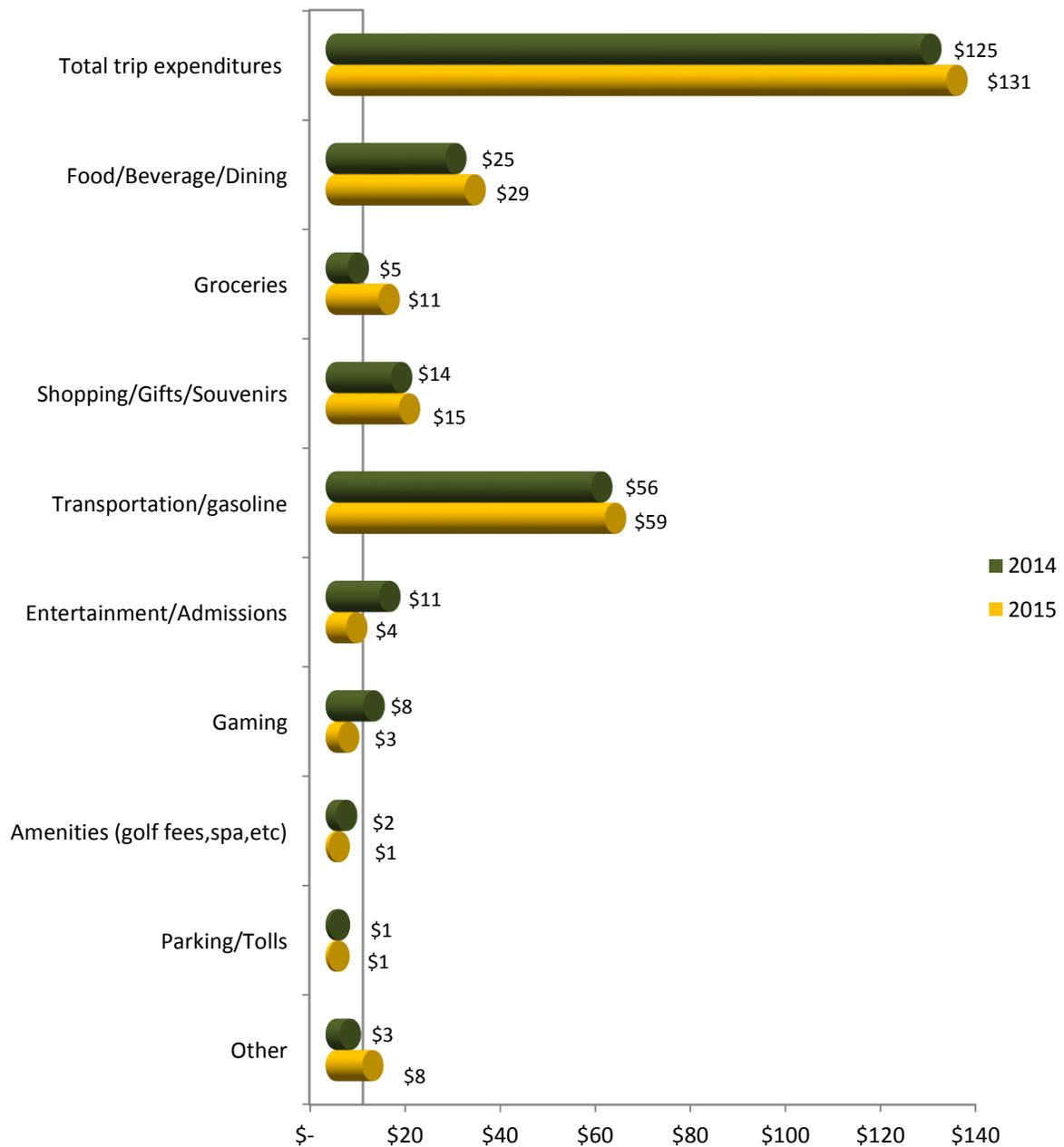
Top Sources of Information for Daytrip Planning



Expenditures by North Carolina Daytrippers

The average daytrip visitor party spending in the state was \$131 in 2015, up slightly from \$125 in 2014. Interesting to note that while transportation decreases were apparent for overnight visitors, daytrippers saw a slight increase in transportation spending. This is possible due to gasoline prices being low enough to encourage daytrip visitation from destinations further away than typical.

Average Spending by Daytrip Visitor Parties to North Carolina



Activities

Fifteen percent of the daytrippers to North Carolina in 2015 visited relatives while on a daytrip in the state and fifteen percent participated in shopping. Eight percent participated in rural sightseeing and six percent visited the beach, friends and participated in fine dining on their daytrip. ****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 Daytrippers to North Carolina					
Activity	2014	2015	Activity	2014	2015
Visiting Relatives	21%	15%	Sports events – Major/Professional	<1%	1%
Shopping	12%	15%	Old Homes/Mansions	2%	1%
Rural Sightseeing	7%	8%	Gardens	2%	1%
Beach	4%	6%	Musical performance/show	<1%	1%
Visiting Friends	7%	6%	Local/folk arts/crafts	1%	1%
Fine Dining	7%	6%	Theme Park/Amusement Park/Water Park	1%	1%
State Park/Monument/Recreation area	2%	4%	Bird Watching	1%	1%
Sport Event- Youth/Amateur/Collegiate/Other(Participant)	1%	4%	Sport Event- Youth/Amateur/Collegiate/Other(Spectator)	1%	1%
Historic Sites/Churches	3%	3%	Special Events/Festivals	1%	1%
Urban Sightseeing	3%	3%	Theater/Drama	1%	1%
Museums	2%	3%	Craft Breweries	<1%	1%
National Park/Monument/Recreation area	1%	2%	Horseback riding	<1%	1%
Zoos/Aquariums/Aviaries	2%	2%	Native American ruins/Rock art	<1%	1%
Casino/Gaming	4%	2%	Fishing	1%	1%
Other nature (photography, rockhounding, etc.)	2%	2%	Musical Theater	1%	1%
Wine Tasting/Winery Tour	1%	2%	Area where a TV show or movie was filmed	1%	1%
Art Galleries	1%	2%	Hunting	<1%	1%
Nature Travel/Eco-touring	2%	2%	Nightclubs/Dancing	2%	<1%
Wildlife Viewing	2%	2%	Symphony/opera/concert	1%	<1%
Hiking/Backpacking	2%	2%	Golf	1%	<1%

Demographic Profile of North Carolina Daytrip Visitors

Nearly three-quarters of North Carolina daytrippers (73%) of the visitors are married and just under fifteen percent the region's visitors are divorced, widowed or separated (14.4%).

The largest proportion of North Carolina daytrippers classify themselves as white (84.5%), and eleven percent classify themselves as black/African American.

Over half (62.1%) of North Carolina daytrippers have a household head with a college degree or higher. The average daytripper is 49 years old.

The average North Carolina daytripper has 11 vacation days each year.

Nearly one-third (31%) of the daytrip visitor parties that traveled to North Carolina in 2015 had a household income \$75,000 or over. Nearly eleven percent had a household income of over \$125,000. The average household income of a daytrip visitor party in 2015 was \$67,350.

More than half (58.0%) of daytrip visitor parties reported that the head of household is employed, while twenty-five percent are retired. The remainder reported "not employed" as work status.

The average household size of a North Carolina daytrip visitor party in 2015 was 2.8.

2015 Top Advertising Markets

In 2015, the top advertising markets sending daytrippers to **North Carolina** were Raleigh-Durham-Fayetteville (23.0%), Charlotte (17.5%), Greenville-Spartanburg-Asheville (11.8%), Greensboro-Winston-Salem-High Point (11.0%), and Greenville-New Bern-Washington (11.0%). Advertising markets correspond with Nielsen's Designated Market Areas (DMAs).

Top Advertising Markets of Origin for North Carolina *Daytrippers*

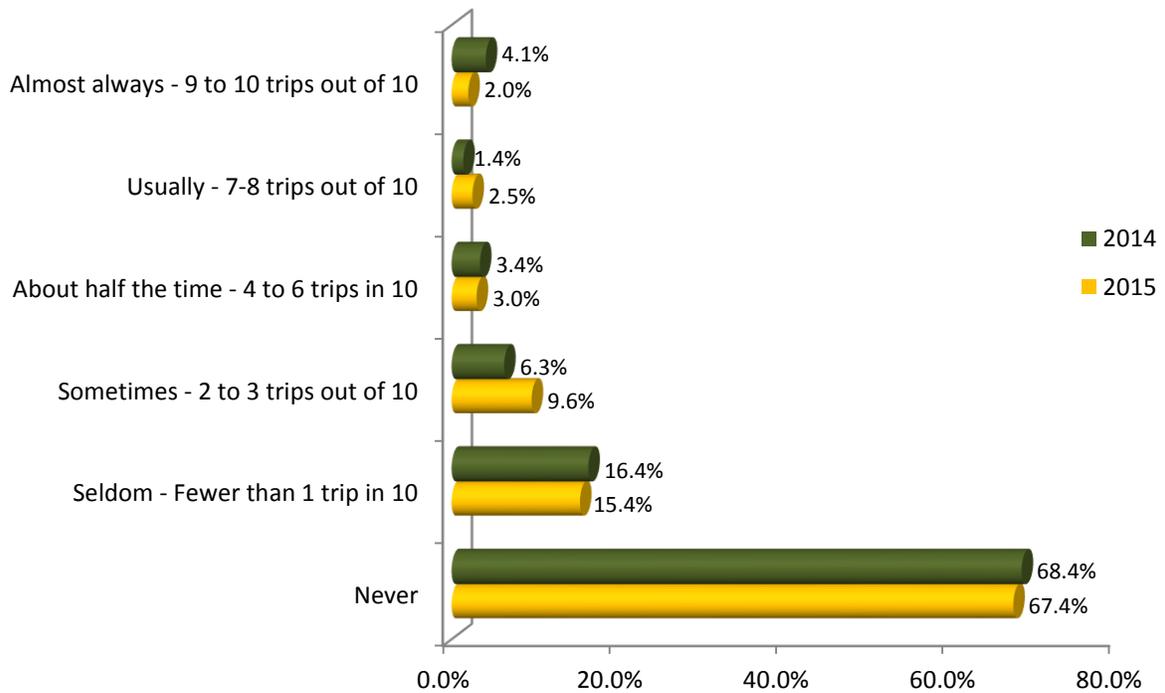
DMA of Origin	2014 Percentage of Total Daytrippers	2015 Percentage of Total Daytrippers
Raleigh-Durham (Fayetteville)	23.9%	23.0%
Charlotte	20.1%	17.5%
Greenville-Spartanburg-Asheville-Anderson	9.0%	11.8%
Greensboro-High Point-Winston Salem	15.7%	11.0%
Greenville-New Bern-Washington	8.7%	11.0%
Wilmington	3.0%	3.6%
Norfolk-Portsmouth-Newport News	1.1%	3.0%
Roanoke/Lynchburg, VA	4.0%	2.4%
Myrtle Beach-Florence	1.6%	2.2%
Atlanta	2.6%	2.1%
Columbia, SC	2.3%	1.7%
Chattanooga	0.7%	1.0%
New York	0.4%	1.0%
Tri-Cities, TN-VA	1.2%	0.5%
Richmond-Petersburg, VA	1.2%	0.5%

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

Vacation Attitudes

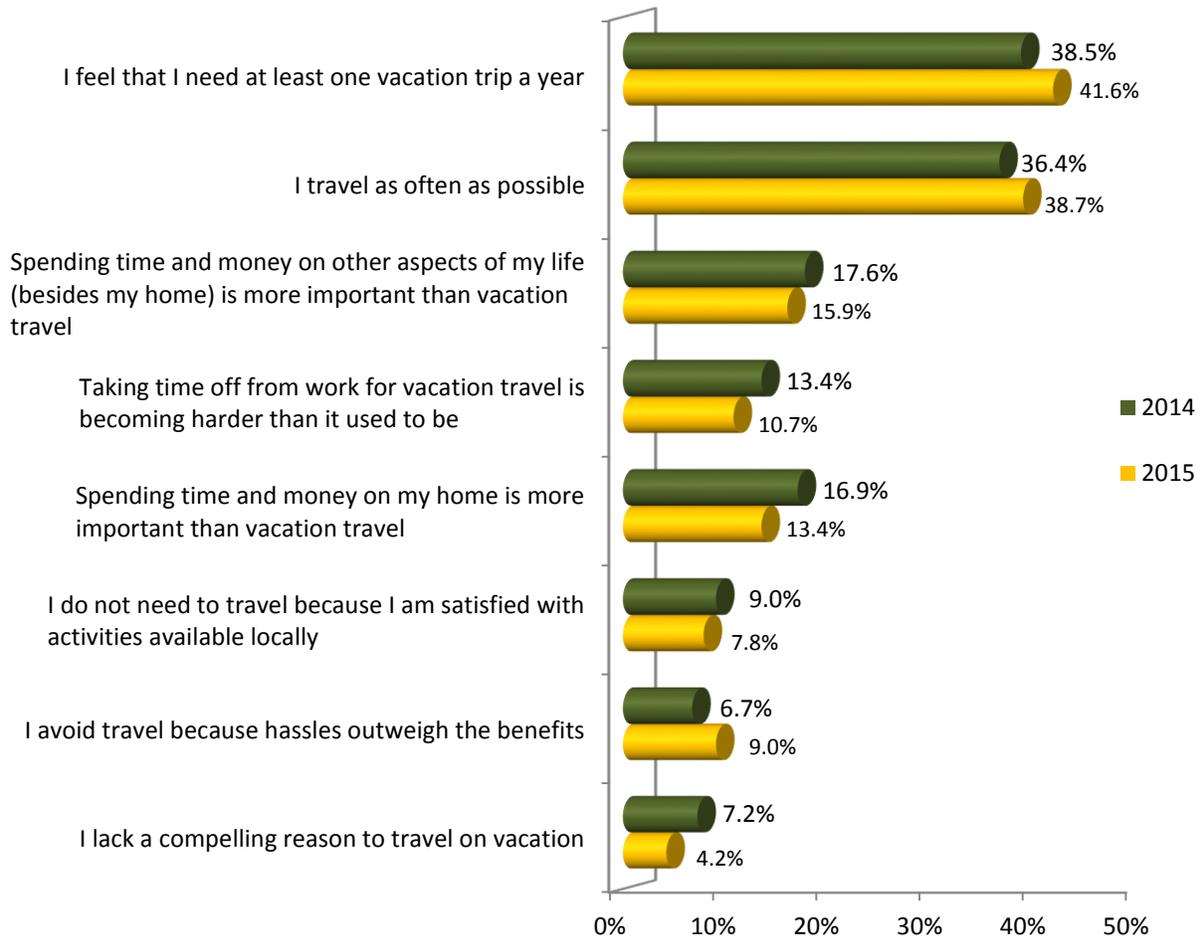
The majority of daytrippers to North Carolina travel without pets, though that proportion has decreased somewhat over the last several years.

How Often Do You Take Leisure Trips with your Pets?



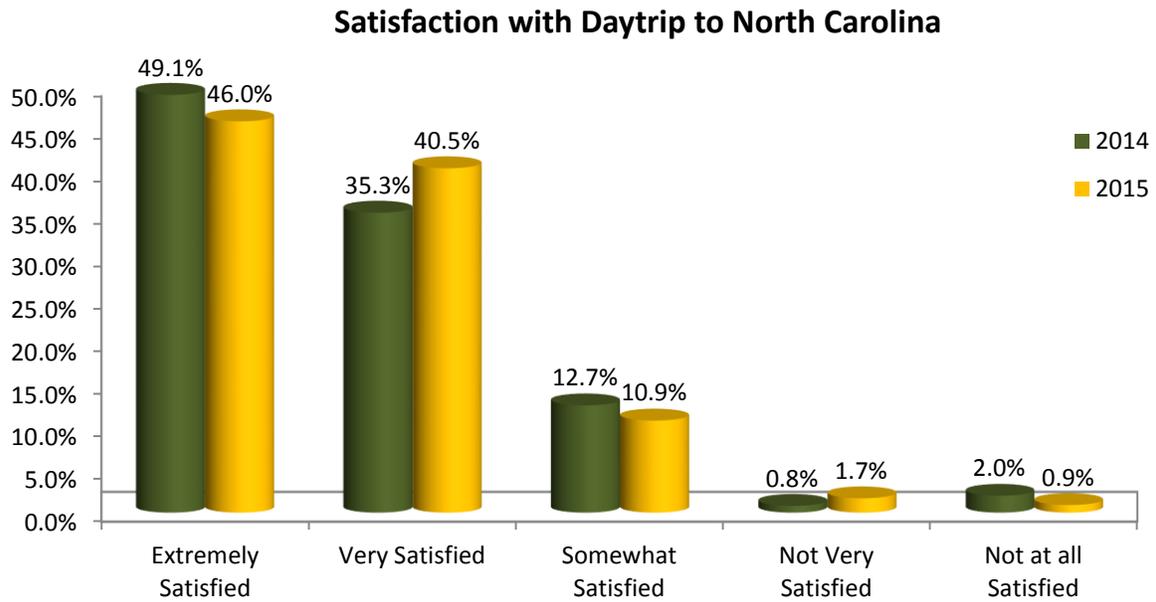
More than forty percent of North Carolina daytrippers report that they need at least one vacation a year and nearly as many note that they travel as often as possible. Less than ten percent indicate that they avoid travel due to the hassles involved with traveling.

Current Feelings Concerning Vacation Travel



Satisfaction with Daytrips to North Carolina

More than eighty-six percent of daytrippers to North Carolina in 2015 were either very or extremely satisfied with their daytrip to or within the state, up from eighty-four percent in 2014. Less than three percent were not satisfied.

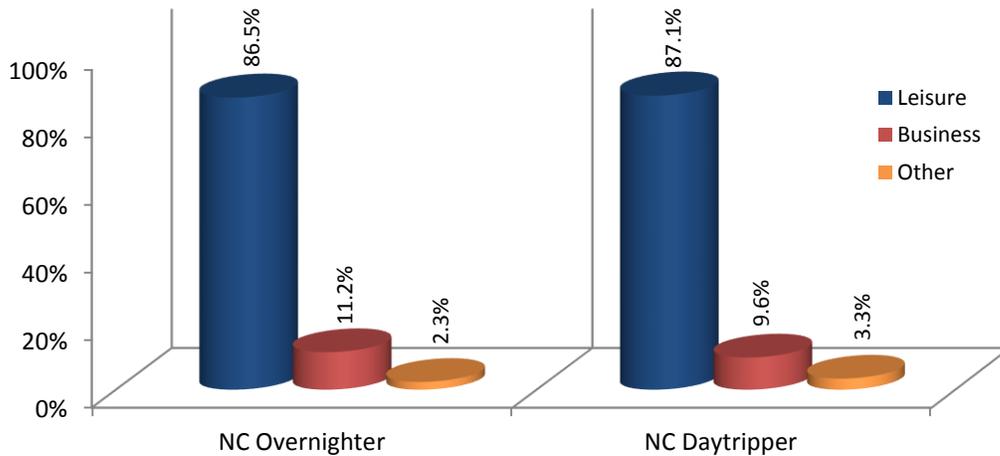


2015 Overnight vs. Daytrip Comparison

The following section provides comparisons and contrasts of North Carolina’s overnight and day visitors.

Leisure is the predominant reason for travel to North Carolina for both overnights and daytrippers, with little noticeable differences between the two seen in 2015.

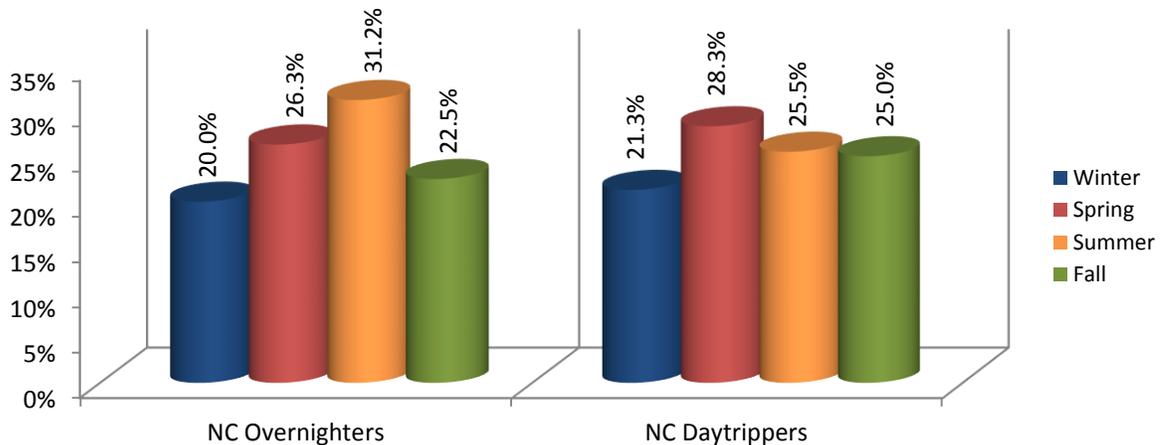
2015 Primary Purpose of Trip



Travel Volume by Season

The seasonal distribution of visitors helps to understand the flow of travelers through the state. Overnighters were more likely to visit during the summer than daytrippers. For the other three seasons, the distribution of visitation for daytrippers was more consistent throughout the year than for overnights.

2015 Season of Travel



2015 North Carolina Overnight Vs. Daytrip

The average party size for overnight visitors was slightly larger than that of daytrippers in 2015. Daytrip visitor parties were slightly less likely to include children in the party.

2015 Travel Party Size

North Carolina Overnights	North Carolina Daytrippers
2.2 people	2.1 people

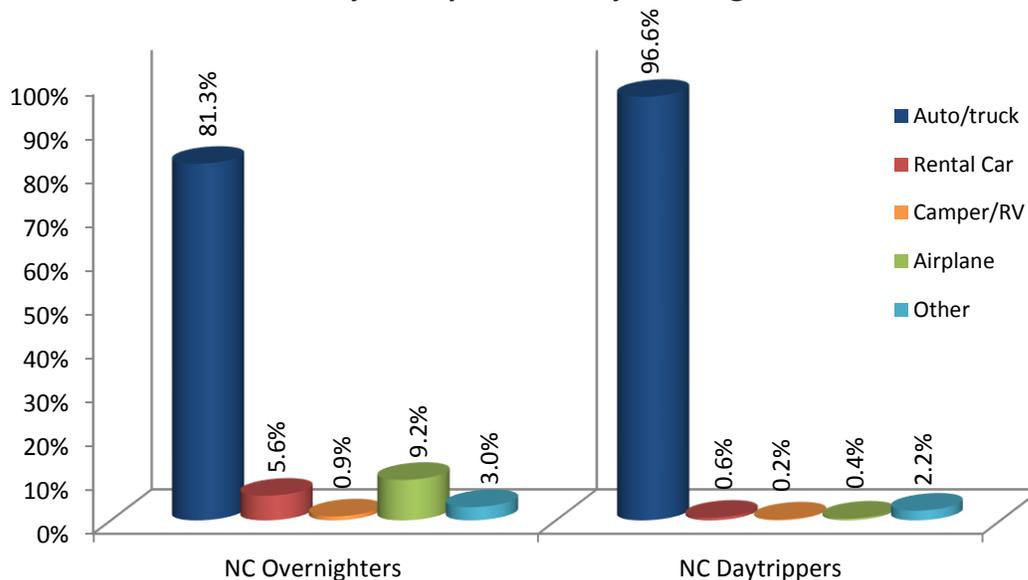
2015 Children on Trip

North Carolina Overnights	North Carolina Daytrippers
28.2%	27.0%

Mode of Transportation

Not surprisingly, auto transportation was the primary use of travel by all of North Carolina visitors, both overnights and daytrippers. Nine percent of overnights used air transportation, while less than one percent of daytrippers flew to the state for the day.

2015 Primary Transportation by Overnight Visitors



Origin of Visitors

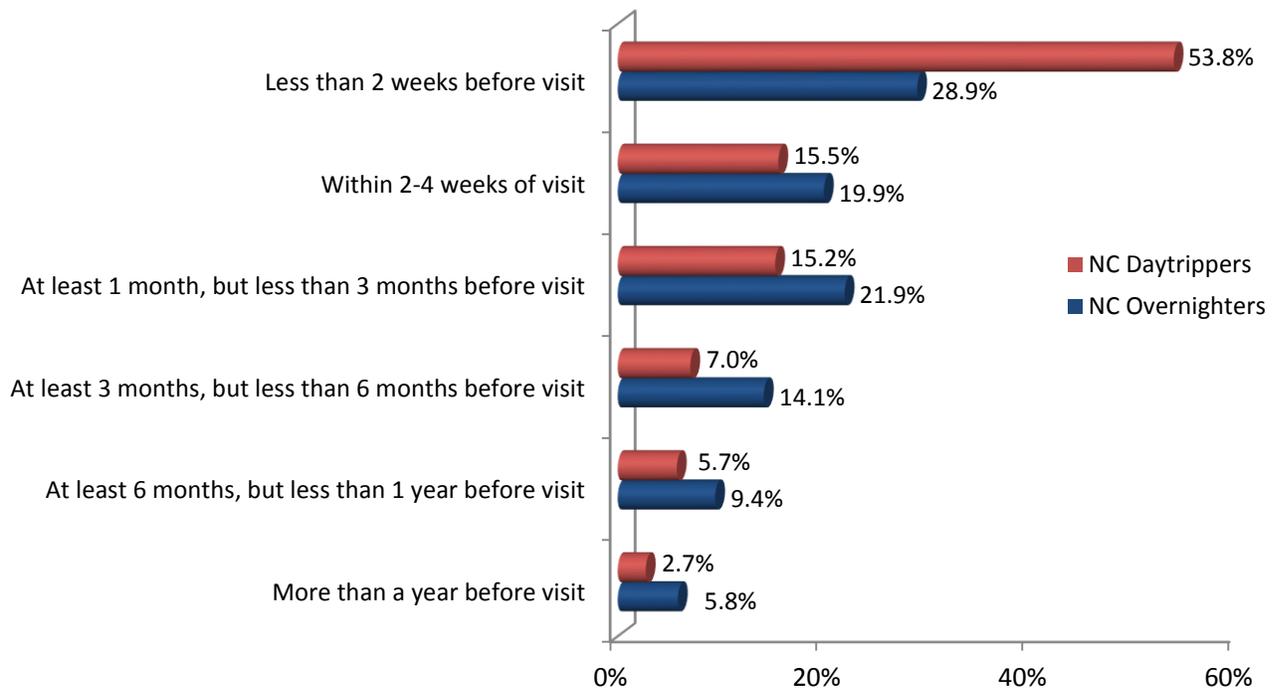
North Carolina is the top state of origin for both overnights and daytrippers to the state. In-state residents comprise thirty-six percent of the state’s overnight visitors and nearly two-thirds of the state’s daytrippers.

NC Overnights	NC Daytrippers
North Carolina (39.0%)	North Carolina (72.7%)
Virginia (8.4%)	South Carolina (10.7%)
Georgia (8.2%)	Virginia (5.7%)
South Carolina (5.3%)	Georgia (2.4%)
Florida (3.9%)	Florida (1.2%)
Pennsylvania (3.6%)	Tennessee (0.9%)
New York (3.3%)	New York (0.8%)
Maryland (3.2%)	Pennsylvania (0.6%)
Ohio (2.7%)	Ohio (0.7%)
Tennessee (2.6%)	Kentucky (0.5%)

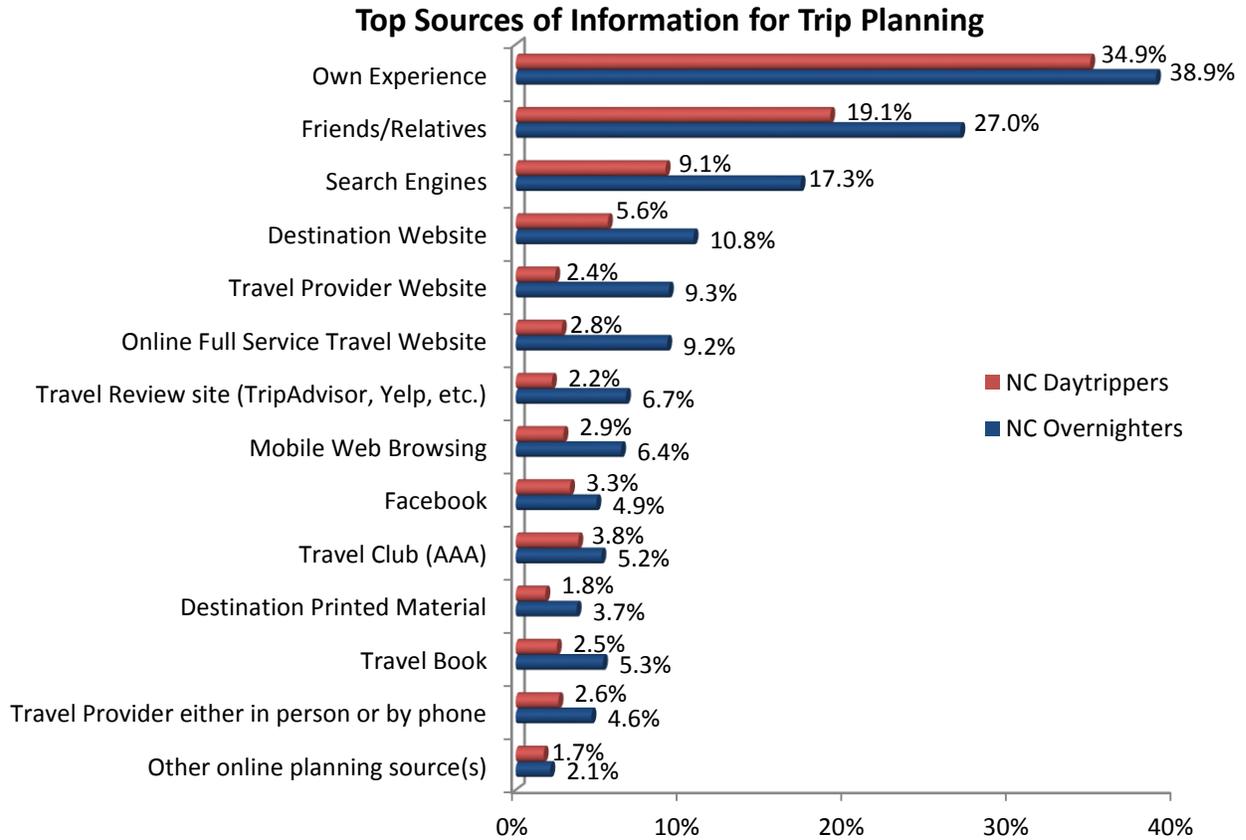
Trip Planning

Daytrippers, not surprisingly, made the decision to visit North Carolina in a shorter time frame than overnights. Over half made the decision less than 2 weeks prior to the visit.

How Far in Advance Decision Was Made to Visit North Carolina



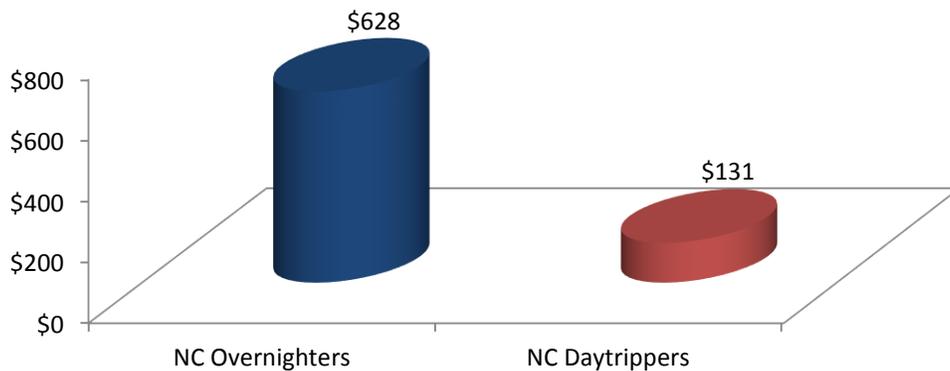
In trip planning, overnighters to North Carolina relied on a larger variety of sources than daytrippers. In particular, they used personal experience, friends/relatives, search engines and websites more than daytrippers.



Trip Expenditures

On average, 2015 overnight visitor parties to and within North Carolina spent nearly \$500 more per trip than daytrippers.

Average Total Trip Spending by Overnight & Daytrip Visitor Parties



Activities

Activities participated in by North Carolina travelers vary by their length of stay, but common activities between regions include visiting relatives, shopping, beach activities, visiting friends and sightseeing.

NC Overnighers	NC Daytrippers
Visiting Relatives (29%)	Visiting Relatives (15%)
Shopping (26%)	Shopping (15%)
Visiting Friends (18%)	Rural Sightseeing (8%)
Beach (16%)	Beach (6%)
Fine Dining (16%)	Visiting Friends (6%)
Rural Sightseeing (15%)	Fine Dining (6%)
Historic Sites/Churches (11%)	State Park/Monument/Recreation area (4%)
Urban Sightseeing (11%)	Sport Event-Youth/Amateur/Collegiate/Other(<u>Participant</u>) (4%)
State Park/Monument/Recreation area (9%)	Historic Sites/Churches (3%)
Museums (8%)	Urban Sightseeing (3%)
Old Homes/Mansions (7%)	Museums (3%)
Wildlife Viewing (7%)	National Park/Monument/Recreation area (2%)
National Park/Monument/Recreation area (5%)	Zoos/Aquariums/Aviaries (2%)
Fishing (5%)	Casino/Gaming (2%)
Gardens (5%)	Other nature (photography, rockhounding, etc.) (2%)
Casino/Gaming (5%)	Wine Tasting/Winery Tour (2%)
Local/folk arts/crafts (5%)	Art Galleries (2%)
Other nature (photography, rockhounding, etc.) (5%)	Nature Travel/Eco-touring (2%)
Craft Breweries (4%)	Wildlife Viewing (2%)
Art Galleries (4%)	Hiking/Backpacking (2%)
Sport Event-Youth/Amateur/Collegiate/Other(<u>Spectator</u>) (4%)	Sports events – Major/Professional (1%)
Zoos/Aquariums/Aviaries (4%)	Old Homes/Mansions (1%)
Hiking/Backpacking (4%)	Gardens (1%)
Nightclubs/Dancing (4%)	Musical performance/show (1%)
Special Events/Festivals (3%)	Local/folk arts/crafts (1%)
Wine Tasting/Winery Tour (3%)	Theme Park/Amusement Park/Water Park (1%)
Musical performance/show (3%)	Bird Watching (1%)
Golf (2%)	Sport Event-Youth/Amateur/Collegiate/Other(<u>Spectator</u>) (1%)
Bird Watching (2%)	Special Events/Festivals (1%)
Spa/Health Club (2%)	Theater/Drama (1%)
Sports events – Major/Professional (2%)	Craft Breweries (1%)
Farms/Ranches/Agri-tours (2%)	Horseback riding (1%)
Musical Theater/Drama (2%)	Native American ruins/Rock art (1%)
Theater/Drama (1%)	Fishing (1%)
Biking/Road Biking/Cycling (1%)	Musical Theater (1%)
Rafting/Kayaking/Canoeing/Paddleboarding (1%)	Area where a TV show or movie was filmed (1%)
Sport Event-Youth/Amateur/Collegiate/Other(<u>Participant</u>) (1%)	Hunting (1%)
Motor Sports (1%)	Nightclubs/Dancing (<1%)
Area where a TV show or movie was filmed (1%)	Symphony/opera/concert (<1%)
Sailing (1%)	Golf (<1%)

Demographic Profile for 2015 North Carolina Visitors

	North Carolina Overnighters	North Carolina Daytrippers
Average age of household head	45.3 years of age	48.8 years of age
Average household size	2.7	2.8
Education of Household Head		
High school or less	13.2%	9.9%
Some college – no degree	22.1%	27.9%
Completed college	46.1%	43.4%
Post Graduate College	18.5%	18.7%
Annual Household Income		
Less than \$30,000	11.5%	19.4%
\$30,000-\$49,999	17.8%	19.9%
\$50,000-\$74,999	22.7%	29.6%
\$75,000 & over	48.0%	31.1%
Average Annual Income	\$83,780	\$67,350
Employment		
Employed	63.0%	58.2%
Retired	22.0%	24.5%
Not employed	14.9%	17.3%
Marital Status		
Married	64.4%	73.3%
Never married	25.4%	12.2%
Divorced, widowed, separated	10.2%	14.4%
Ethnicity		
White	85.6%	84.5%
Black/African American	8.8%	11.3%
Asian or Pacific Islander	2.6%	0.4%
Other	3.0%	3.8%

2015 Top Advertising Markets

The top twenty advertising markets for the overnights and daytrippers very similar, but differences can be noted in the ranks. Raleigh-Durham and Charlotte are the primary markets for both overnights and daytrippers. Greenville-Spartanburg-Asheville is the third top DMA for overnights to and within the state, while Greensboro-High Point-Winston Salem is the third top DMA for daytrippers. It is worth noting the proportion of daytrip visitors from states such as New York and Florida who are likely visiting the state while traveling to other destinations along north/south highways.

NC Overnights

Raleigh-Durham-Fayetteville (12.8%)
Charlotte (8.6%)
Greenville-Spartanburg-Asheville (6.6%)
Atlanta (5.6%)
Greensboro-High Point-Winston Salem (4.3%)
Greenville-New Bern-Washington (4.3%)
Washington, DC (Hagerstown, MD) (4.3%)
New York (4.1%)
Wilmington (2.7%)
Norfolk-Portsmouth-Newport News (2.2%)
Philadelphia (2.1%)
Myrtle Beach-Florence (2.1%)
Richmond-Petersburg (1.5%)
Augusta (1.5%)
Boston (Manchester) (1.5%)
Baltimore (1.4%)
Roanoke-Lynchburg (1.3%)
Orlando-Daytona Beach-Melbourne (1.1%)
Columbia (1.0%)
Tri-Cities, TN-VA (1.0%)
Tampa-St. Petersburg-Sarasota (1.0%)
Nashville (1.0%)
Cleveland-Akron (Canton) (1.0%)
Chicago (1.0%)

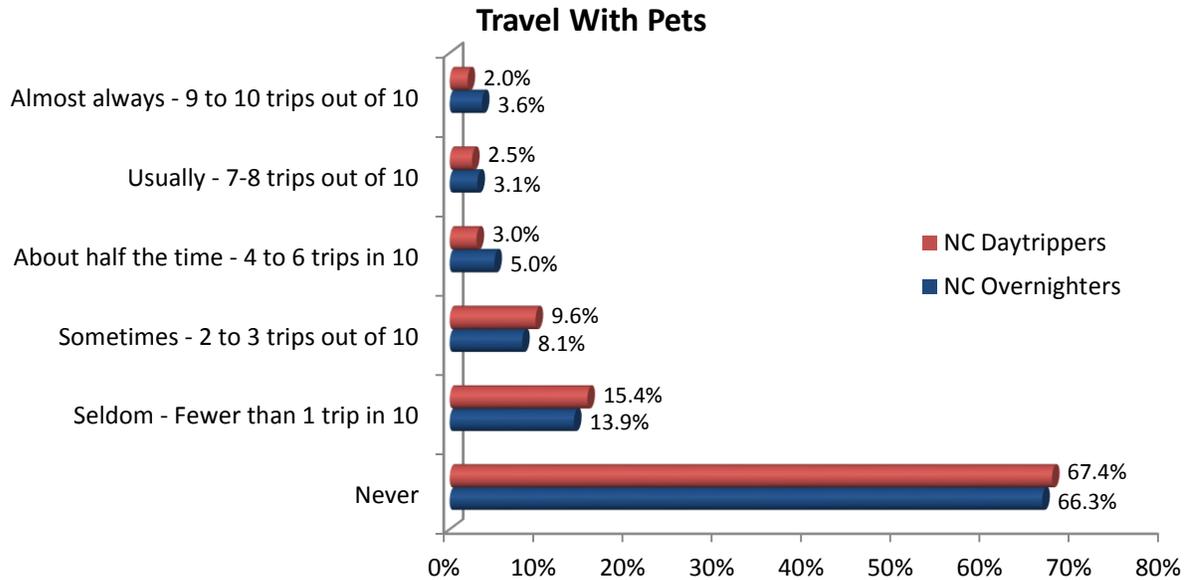
NC Daytrippers

Raleigh-Durham-Fayetteville (25.9%)
Charlotte (20.0%)
Greensboro-High Point-Winston Salem (11.8%)
Greenville-Spartanburg-Asheville (11.2%)
Greenville-New Bern-Washington (11.0%)
Wilmington (4.4%)
Norfolk-Portsmouth-Newport News (3.4%)
Roanoke-Lynchburg (2.7%)
Myrtle Beach-Florence (2.5%)
Columbia (1.8%)
Atlanta (1.6%)
Chattanooga (1.3%)
New York (0.6%)
Tri-Cities, TN-VA (0.6%)
Richmond-Petersburg (0.3%)
Lexington, KY (0.3%)
Bowling Green, KY (0.3%)
Washington DC (0.1%)
Tampa-St. Petersburg-Sarasota (0.1%)
Knoxville (0.1%)

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

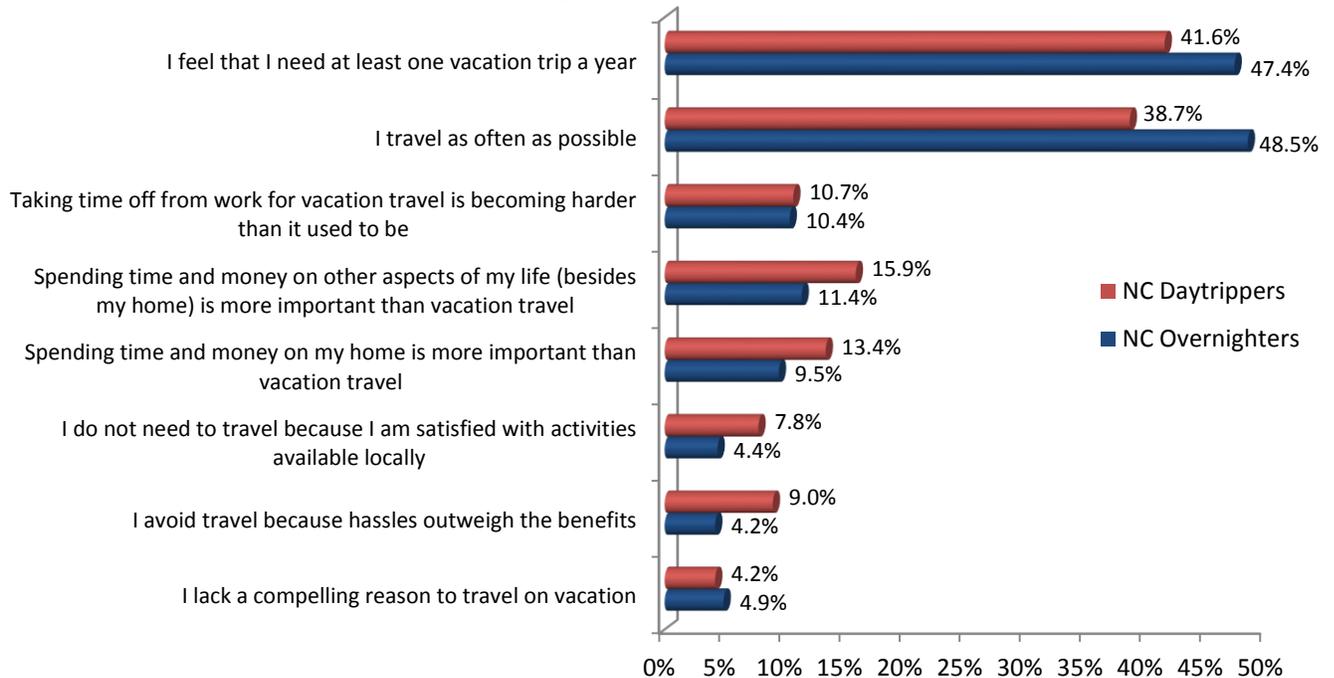
Vacation Attitudes

The majority of North Carolina visitors, both overnighers and daytrippers, do not travel with pets.



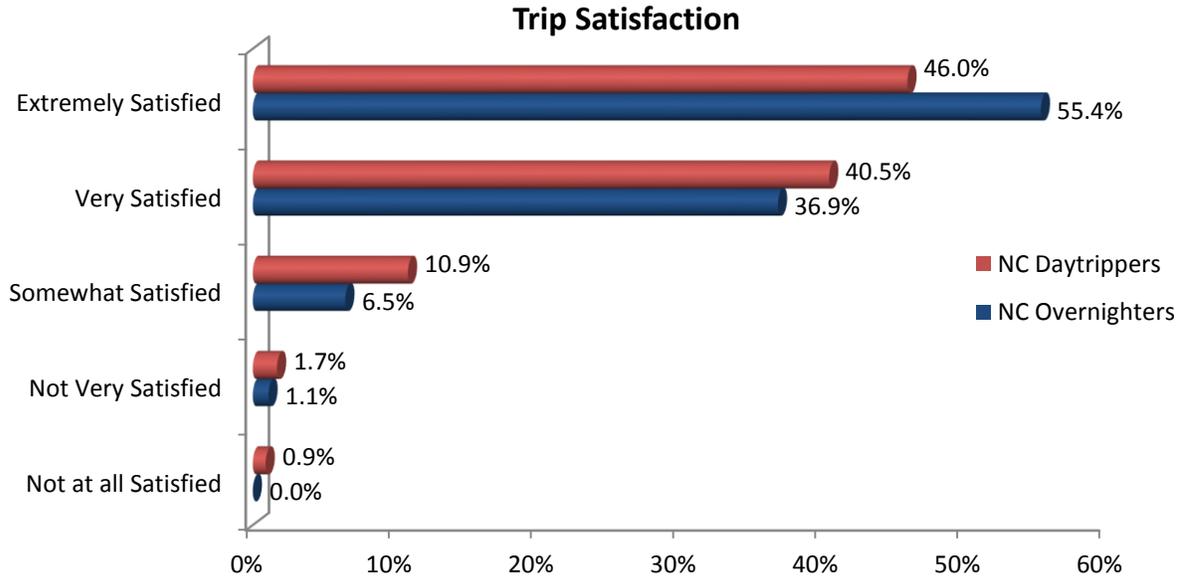
Not surprisingly, both overnighers and daytrippers feel the need for a vacation at least once a year and a high proportion report that they travel as often as possible.

Current Feelings Concerning Vacation Travel



Trip Satisfaction

Both overnight visitors and daytrippers in North Carolina reported high trip satisfaction in 2015. Ninety-two percent of overnights and nearly eighty-seven percent of daytrippers expressed they were extremely or very satisfied with their trip.



2015 North Carolina Regional Travel Summary

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.