

2015 International Visitation to North Carolina

A publication of Visit North Carolina

A Unit of the Economic Development Partnership of North Carolina



Executive Summary

- Applying conservative assumptions to empirical data provides that an estimated 1.26 million international visitors travel to North Carolina. This includes nearly 500,000 Canadians.
- Approximately \$443 million in spending is associated with these visitors. The top ten origin countries represent 71 percent of visitation and 65 percent of spending.
- In terms of market share of international visitors to North Carolina, Canada is the top market with nearly 40 percent of market share and 27 percent of spending. The top overseas market is the UK with nearly 8 percent of market share and spending. Germany (market share, 6.2%; spending, 5.8%) and China (market share, 4.4%; spending, 9.3%) are the next top markets. Other top countries in terms of volume are India, Mexico, Japan, France, Ireland and Italy.
- In terms of spending per visitor, visitors from China/Hong Kong spend the most with an average of \$736 per visitor, down slightly from \$756 per visitor in 2014. Visitors from Switzerland followed with an average per person spending of \$609, followed by visitors from Venezuela with \$515 per visitor. Other top countries with high per person spending are Japan (\$500), Brazil (\$490), South Korea (\$472) and Italy (\$425). Spending includes only spending that occurs in North Carolina. Air fares and other pre-paid expenses are not included.
- Visitors from Japan, Ireland, Italy, Switzerland and India spend a much larger proportion of their total spending on lodging than other visitors to North Carolina. Visitors from the UK, Germany and France also spend a higher than average proportion of their travel budgets on lodging in the state. Visitors from South America, Mexico and China allocate a smaller proportion on lodging than other international visitors.
- Visitors from Europe tend to spend a larger proportion of their travel budgets on dining, while visitors from South America, Mexico and Asia spend more in supermarkets, indicating that they may be cooking in their places of lodging rather than eating in restaurants. Nearly twenty percent of spending by Venezuelan visitors is in supermarkets, while only five percent is spent in restaurants.
- Visitors from China, Mexico, Brazil, Sweden, and Australia spend more of their total travel budget on retail in general, particularly in radio/TV/stereo stores (China), department stores (China), specialty retail (Venezuela) and discount stores (Mexico and Venezuela). Over half of the Chinese spending in NC is in the retail sector.
- Italian, German and Swiss visitors allocate a larger proportion of total spending on auto rental and gasoline/oil than other international visitors to North Carolina. Canadians spend seven percent of their spending in-state on oil, but as many are drive travelers, have a lower than average percentage of spending on car rentals.
- Regionally within North Carolina, it is estimated that the Piedmont Region receives the majority of international visitors (85 percent), followed by the Coastal Region (13 percent) and the Mountain Region (10 percent). Note that percentages do not equal 100 due to visitors who travel to multiple regions. German, Swedish and Swiss visitors are the most likely to visit multiple regions within the state.

**Table 1: North Carolina's Top 15 International Markets by Market Share
(Ranked by Visitor Volume)**

Rank	Country of Origin	2015 Estimated Visitors	% change from 2014	2015 Total Spent	% change from 2014	Average Spending per Visitor
1	Canada	497,534	-4.6%	\$ 121,188,650	-3.3%	\$244
2	United Kingdom	95,608	-4.2%	\$ 34,886,900	4.8%	\$365
3	Germany	78,433	-9.6%	\$ 25,696,208	-4.0%	\$328
4	China/Hong Kong	55,748	24.2%	\$ 41,041,253	21.0%	\$736
5	India	44,828	13.5%	\$ 17,140,205	17.5%	\$382
6	Mexico	36,264	-4.8%	\$ 13,184,270	-6.3%	\$364
7	Japan	28,627	-3.5%	\$ 14,317,363	-14.9%	\$500
8	France	25,440	-15.5%	\$ 9,381,063	-2.1%	\$369
9	Ireland	15,154	6.0%	\$ 5,595,238	1.7%	\$369
10	Italy	14,292	-7.1%	\$ 6,067,355	-13.5%	\$425
11	Brazil	12,236	-44.4%	\$ 6,000,966	-36.9%	\$490
12	Spain	11,295	9.0%	\$ 2,796,810	-6.2%	\$248
13	Australia	10,276	-8.0%	\$ 3,902,323	-15.9%	\$380
14	South Korea	10,106	0.6%	\$ 4,769,033	11.4%	\$472
15	Switzerland	8,509	-0.5%	\$ 5,182,430	-0.8%	\$609
	Subtotal	944,350	-3.9%	\$ 311,150,067	-0.7%	\$329
	Other	312,849	-3.2%	\$ 132,144,691	-4.1%	\$422
	TOTAL	1,257,199	-3.7%	\$ 443,294,758	-1.8%	\$353

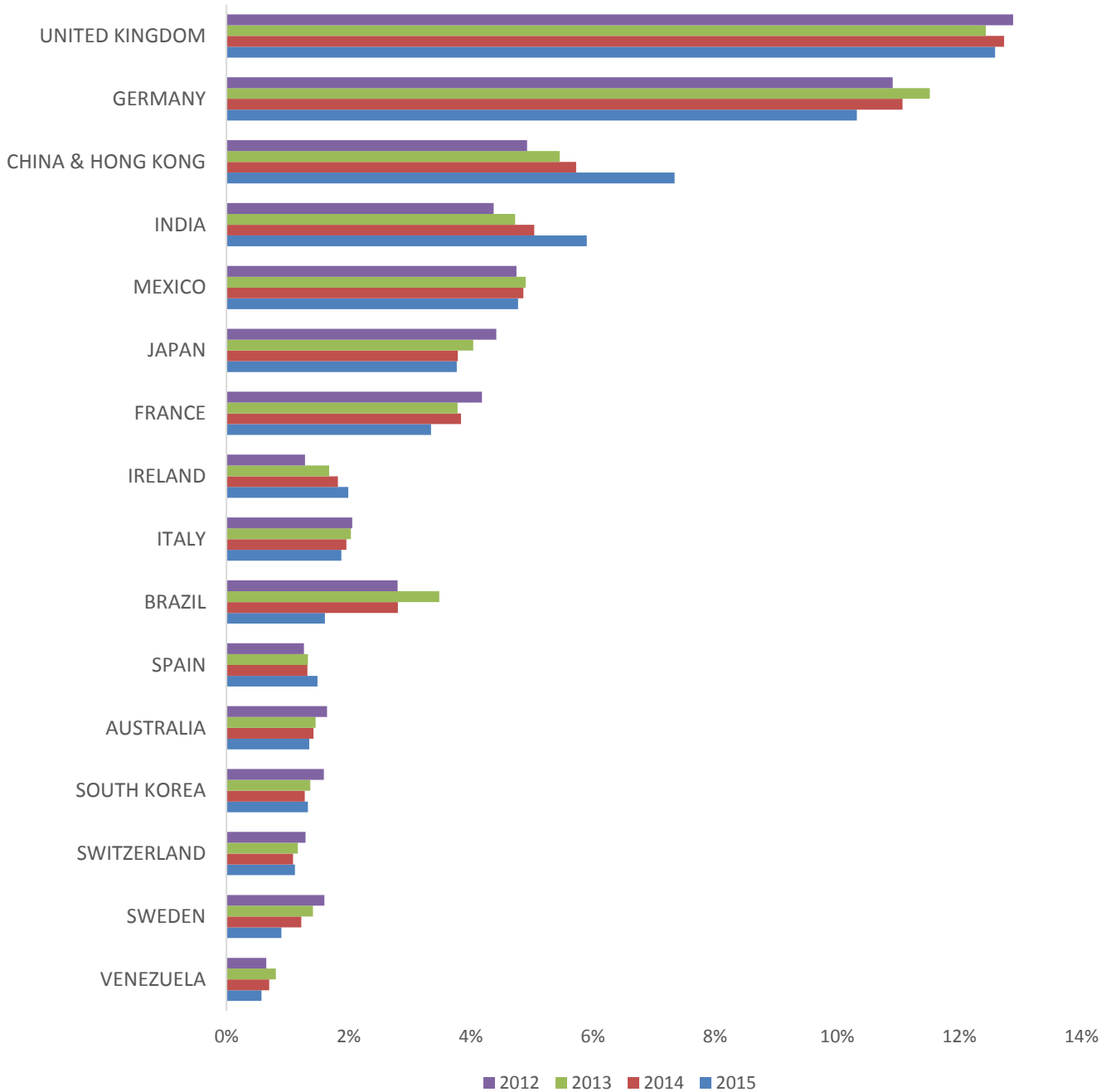
* Spending only includes what is spent in North Carolina.

** Canada is included in 2012 - 2015 estimates, therefore totals should not be directly compare with reports prior to 2012.

*** Visit North Carolina estimates are based on extrapolations from government data and aggregate Visa usage data provided by VisaVue Travel for the period of calendar year 2015.

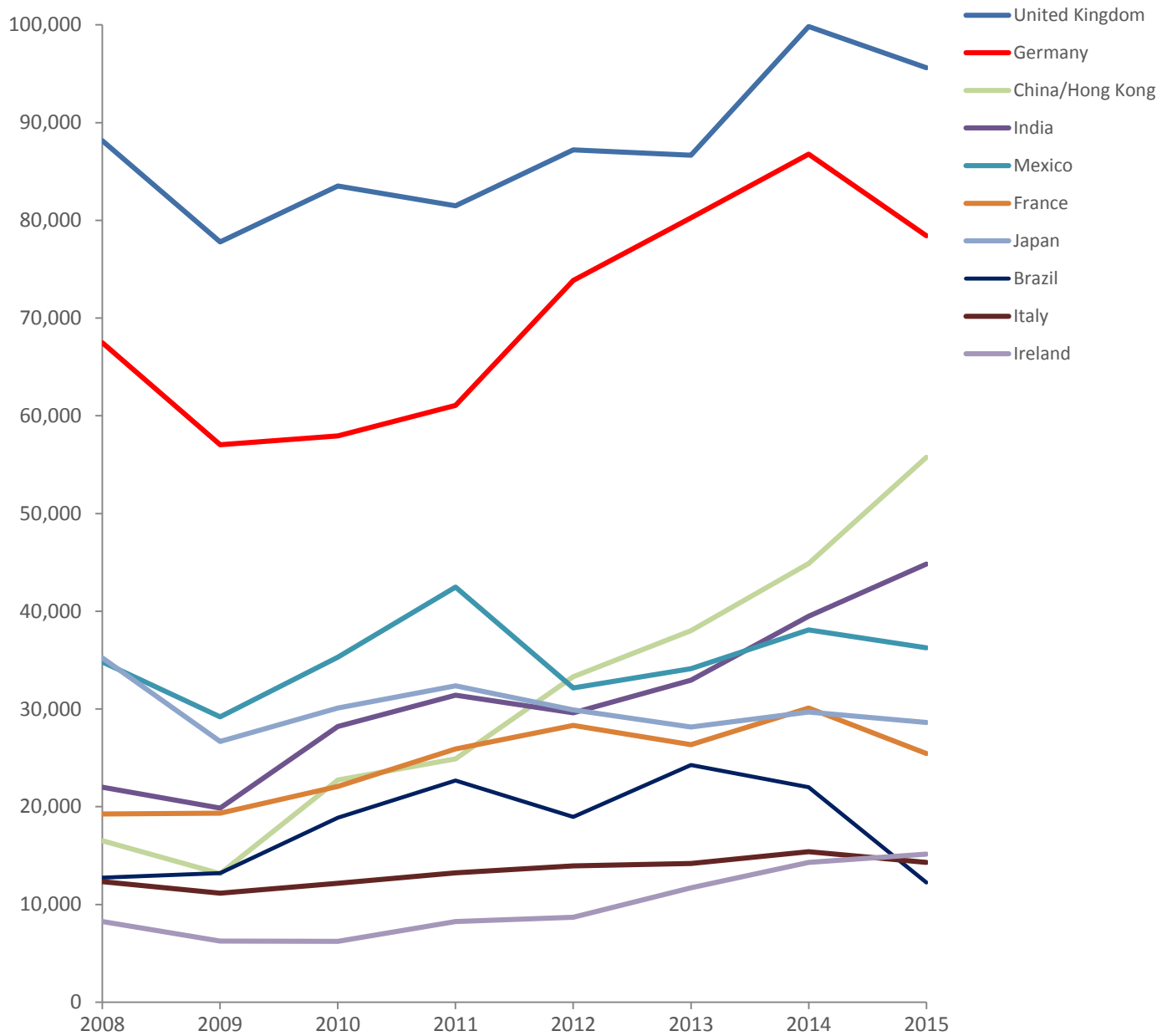
- Canada ranks first in terms of volume of international visitors to North Carolina, while the United Kingdom ranks first in terms of overseas visitation to the state with nearly 100,000 visitors. Visitation from the UK decreased four percent in 2015, but has increased ten percent since 2012. Despite the volume decrease, spending by UK visitors increased nearly five percent in 2015.
- Germany ranks third in terms of overall international visitation and second in overseas visitation. The number of German visitors to North Carolina decreased in 2014 (-9.6%), as did their total spending (-4%). However, per person spending by German visitors increased six percent in 2015.
- In terms of total spending in North Carolina, China/Hong Kong ranks second with an estimated \$41 million in total spending, behind Canadians with more than \$121 million.
- Chinese visitors also have the highest per person spending average at \$736, followed by visitors from Switzerland (\$609), Venezuela (\$515) and Japan (\$500).

Chart 1: Market Share of Top International Countries of Origin to North Carolina
(Canada not included in calculations)



- The United Kingdom ranks first in terms of market share of non-Canadian visitors to North Carolina.
- Germany, China/Hong Kong and India are the next top markets in terms of market share.
- The top 15 countries of origin, (not including Canada) represent 60 percent of market share of non-Canadian international visitation to North Carolina.

Chart 2: Volume Growth of Top International Markets to North Carolina 2008-2015



**Does not include Canadian visitation*

Table 2: Canadian Spending in North Carolina

Category	Percent of Total	Spending	% Growth from 2014
Lodging	29.3%	\$35.6M	+1.2%
Restaurants	12.2%	\$14.8M	+2.7%
Business to Business	7.2%	\$8.8M	+28.7%
Supermarkets	7.0%	\$8.4M	+0.2%
Oil	6.8%	\$8.3M	-29.5%
Auto Rental	4.9%	\$6.0M	+0.6%
Clothing/Jewelry/Accessories	4.7%	\$5.7M	-25.2%
Other Travel & Entertainment	2.8%	\$3.4M	-10.6%
Automotive Repair/Service/Parts, etc.	2.8%	\$3.4M	-7.5%
Sporting Goods Stores	2.3%	\$2.8M	+8.9%
	Sub Total	80.1%	\$97.1M
	Total	100.0%	\$121.2M
			-3.3%

- Canadian visitors spend the largest proportion of their travel budgets in North Carolina on lodging, restaurants and business to business activities. While the share of retail spending dropped in the 2015, these visitors still spend nearly as much of their budgets on retail in aggregate (24%) as they do in lodging (29%).
- Visitors from Canada have the highest proportion of business to business spending (7.2% of dollars spent) and oil (6.8% of dollars spent) of all international visitors, though the oil spending is a direct correlation to being an international drive origin market.

Table 3: Canadian Visitor Volume 2012-2015

Canadian Visitor Volume	2012	2013	2014	2015
	553,948	516,073 (-6.8%)	521,776 (+1.1%)	497,534 (-4.6%)

*previous years' volume counts not directly comparable to 2012-present, as different methodology was implemented.

- Visitation to North Carolina by Canadians was down four percent from 2014, and spending was down about three percent.
- Canada is the top international market for North Carolina with five times the visitors of the next largest market of origin.

Table 4: 2015 Regional Canadian Visitors

Canadian Visitor Volume	Coast	Piedmont	Mountains
% of Canadian Visitors to NC*	16.7%	82.4%	7.9%

*Volume percentages do not equal 100% due to visitation to multiple regions within the state.

Table 5: UK Spending in North Carolina

Category	Percent of Total	Spending	% Growth from 2014
Lodging	32.8%	\$11.4M	+8.7%
Restaurants	13.5%	\$4.7M	+6.6%
Clothing/Jewelry/Accessories	8.1%	\$2.8M	-4.5%
Auto Rental	7.6%	\$2.6M	+8.2%
Supermarkets	7.0%	\$2.5M	+1.9%
Radio/TV/Stereo Stores	2.6%	\$921,549	-22.1%
Department Stores	2.6%	\$913,204	-3.4%
Other Travel & Entertainment	2.2%	\$764,663	-15.0%
Specialty Retail	1.7%	\$598,889	+15.2%
Health Care	1.7%	\$591,814	-3.7%
Sub Total	79.9%	\$27.9M	
Total	100.0%	\$34.9M	+4.8%

- In the UK market, lodging represents the largest spending category followed by retail in total and restaurants.
- Spending by UK visitors in specialty retail businesses increased more than fifteen percent in 2015 and spending in lodging and auto rental increased more than eight percent.

Table 6: UK Visitor Volume 2008-2015

UK Visitor Volume	2008	2009	2010	2011	2012	2013	2014	2015
	88,138	77,788 (-11.7%)	81,497 (+7.3%)	81,497 (-2.4%)	87,203 (+7.0%)	86,662 (-0.6%)	99,831 (+15.2%)	95,608 (-4.2%)

- Visitation to North Carolina by UK visitors dropped four percent in 2015, however 2015 still ranked as the second highest volume year for UK visitation. Though volume decreased somewhat, the value of visitation from this market increased. Per visitor expenditures increased nine percent from 2014 to 2015.
- The UK remains the top international market for North Carolina behind Canada, and the top overseas market.

Table 7: 2015 Regional UK Visitors

UK Visitor Volume	Coast	Piedmont	Mountains
% of UK Visitors to NC*	10.9%	84.4%	12.8%

*Volume percentages do not equal 100% due to visitation to multiple regions within the state.

Table 8: German Spending in North Carolina

Category	Percent of Total	Spending	% Growth from 2014
Lodging	32.4%	\$8.3M	+14.1%
Clothing/Jewelry/Accessories	14.2%	\$3.7M	-16.3%
Restaurants	12.3%	\$3.2M	+7.3%
Auto Rental	10.6%	\$2.7M	-8.4%
Supermarkets	8.4%	\$2.2M	+4.5%
Oil	2.7%	\$686,988	-24.1%
Specialty Retail	2.1%	\$541,952	-5.4%
Department Stores	2.1%	\$534,746	-33.0%
Other Travel & Entertainment	1.9%	\$476,067	-10.5%
Radio/TV/Stereo Stores	1.4%	\$367,840	-54.2%
Sub Total	88.0%	\$22.6M	
Total	100.0%	\$25.7M	-4.0%

- German visitors spend a larger proportion of their total spending on “auto rental” and consequently “oil” than visitors from most other countries of origin (behind Italy and tied with Switzerland). Thirteen percent of German spending in the state is in car rental and oil/gas expenditures.
- Spending on lodging (+14.1%) by German visitors increased in 2015, as did spending in restaurants (+7.3%) and supermarkets (+4.5%).

Table 9: German Visitor Volume 2008-2015

German Visitor Volume	2008	2009	2010	2011	2012	2013	2014	2015
	67,471	57,031 (-15.5%)	57,951 (+1.6%)	61,053 (+5.4%)	73,847 (+21.0%)	80,261 (+8.7%)	86,783 (+8.1%)	78,433 (-9.6%)

- After five years of increases, German visitation decreased nine percent in 2015, but volume is still six percent higher than in 2012.
- Despite the decreases in volume and spending overall, per person spending by German visitors increased six percent in 2015.
- Germany remains third in international visitation and second in terms of overseas visitation to North Carolina.

Table 10: 2015 Regional German Visitors

German Visitor Volume	Coast	Piedmont	Mountains
% of German Visitors to NC*	17.8%	80.0%	16.0%

*Volume percentages do not equal 100% due to visitation to multiple regions within the state.

Table 11: Chinese Spending in North Carolina

Category	Percent of Total	Spending	% Growth from 2014
Clothing/Jewelry/Accessories	22.3%	\$9.2M	+10.8%
Lodging	15.6%	\$6.4M	+25.9%
Radio TV & Stereo Stores	11.3%	\$4.7M	+107.6%
Supermarkets	10.5%	\$4.3M	+13.1%
Restaurants	9.1%	\$3.7M	+19.5%
Department Stores	6.0%	\$2.4M	+2.1%
Auto Rental	4.2%	\$1.7M	+9.1%
Specialty Retail	2.3%	\$951,662	+38.7%
Furniture/Equipment Stores	2.0%	\$830,783	+33.7%
Health Care	1.4%	\$594,789	+15.9%
Sub Total	84.7%	\$34.8M	
Total	100.0%	\$41.0M	+21.0%

- Chinese visitors to North Carolina spend nearly one-fourth of their total spending on clothing/jewelry/accessories, the largest proportion of any other top market, and more than they spend on lodging. They spend over half (55%) of their total spending in retail in general.
- Spending in all sectors increased for Chinese visitors in 2015, particularly in electronics and other retail. Lodging expenses increased nearly twenty-six percent.
- Chinese visitors spend a less than average proportion of total spending in restaurants and auto rentals/oil when compared to other countries.

Table 12: Chinese Visitor Volume 2008-2015

Chinese Visitor Volume	2008	2009	2010	2011	2012	2013	2014	2015
	16,530	13,161 (-20.4%)	22,745 (+72.8%)	24,899 (+9.5%)	33,310 (+8.7%)	38,014 (+14.1%)	44,891 (+18.1%)	55,748 (+24.2%)

- Visitation to North Carolina by Chinese visitors continued its growth from 2014 to 2015 (+24%).
- China ranks fourth in terms of international visitation to North Carolina, and third in overseas visitation, but is still about half of the size of the UK market.
- Chinese visitors have the highest per person spending of all international visitors to the state (\$736). Per person spending by Chinese visitors actually decreased in 2015 (-2.6%), but the overall increased impact of this market was realized by the increased in volume.

Table 13: 2015 Regional Chinese Visitors

Chinese Visitor Volume	Coast	Piedmont	Mountains
% of Chinese Visitors to NC*	6.6%	91.2%	9.0%

*Volume percentages do not equal 100% due to visitation to multiple regions within the state.

Table 14: Indian Spending in North Carolina

Category	Percent of Total	Spending	% Growth from 2014
Lodging	35.6%	\$6.1M	+8.8%
Supermarkets	15.8%	\$2.7M	+32.7%
Restaurants	9.2%	\$1.6M	+25.0%
Clothing/Jewelry/Accessories	7.5%	\$1.3M	+40.1%
Radio/TV/Stereo Stores	5.4%	\$925,447	+7.6%
Auto Rental	3.8%	\$652,597	+1.5%
Department Stores	3.0%	\$518,650	+10.7%
Drug Stores & Pharmacies	1.8%	\$308,620	-40.5%
Specialty Retail	1.4%	\$239,647	+17.0%
Discount Stores	1.3%	\$220,590	+13.3%
Furniture/Equipment Stores	1.3%	\$218,237	-14.7%
Sub Total	86.2%	\$14.8M	
Total	100.0%	\$17.1M	+17.5%

- Visitors to North Carolina from India spend a larger than average proportion of their total in-state spending on lodging (36%) than most other countries of origin.
- Indian visitors to North Carolina spend a slightly less than average proportion of their total spending on restaurants, but a larger proportion of spending at quick service restaurants (2.9%). They also allocate a greater than average proportion at supermarkets (16%).

Table 15: Indian Visitor Volume 2008-2015

Indian Visitor Volume	2008	2009	2010	2011	2012	2013	2014	2015
	21,993	19,868 (-10.5%)	28,216 (+42.0%)	31,424 (+11.4%)	29,599 (-5.8%)	32,941 (+11.3%)	39,502 (+19.9%)	44,828 (+13.5%)

- Indian visitation to North Carolina increased nearly fourteen percent in 2015 and reached a new record volume.
- India ranks fifth in terms of international visitation and fourth in overseas visitation to North Carolina.

Table 16: 2015 Regional Indian Visitors

Indian Visitor Volume	Coast	Piedmont	Mountains
% of Indian Visitors to NC*	-	95.6%	-

*Volume percentages do not equal 100% due to visitation to multiple regions within the state.
 - regional sample size not adequate to estimate percentage of visitation

Table 17: Mexican Spending in North Carolina

Category	Percent of Total	Spending	% Growth from 2014
Lodging	19.6%	\$2.6M	+10.9%
Clothing/Jewelry/Accessories	19.2%	\$2.5M	-13.4%
Supermarkets	11.0%	\$1.5M	+1.6%
Restaurants	9.6%	\$1.3M	-4.7%
Auto Rental	6.8%	\$890,319	+0.2%
Department Stores	4.4%	\$576,733	-26.2%
Discount Stores	4.2%	\$553,384	-7.3%
Radio TV & Stereo Stores	3.5%	\$456,807	-29.1%
Specialty Retail	3.3%	\$433,495	-11.0%
Automotive Repair/Service/Parts	1.9%	\$244,836	+8.8%
Sub Total	83.2%	\$11.0M	
Total	100.0%	\$13.2M	-6.3%

- Mexican visitors spend a lower than average proportion of their total spending on lodging than visitors from other countries, just nineteen percent of their total spending in the state. However, in 2015, spending on lodging grew nearly eleven percent from 2014, and climbed above clothing as the top spending category.
- Visitors to North Carolina from Mexico spend a greater than average proportion of their trip spending on retail, clothing/jewelry/accessories in particular. Nearly half (46.2%) of their spending in North Carolina is in retail.

Table 18: Mexican Visitor Volume 2008-2015

Mexican Visitor Volume	2008	2009	2010	2011	2012	2013	2014	2015
	34,805	29,207 (-16.1%)	35,296 (+20.8%)	42,470 (+20.3%)	32,151 (-24.3%)	34,132 (+6.2%)	38,085 (+11.6%)	36,264 (-4.8%)

- Mexican visitation to the state decreased about five percent from 2014, but remained above 2012-2013 volume levels.
- The country ranks sixth in terms of international visitation to the state.

Table 19: 2015 Regional Mexican Visitors

Mexican Visitor Volume	Coast	Piedmont	Mountains
% of Mexican Visitors to NC*	-	89.9%	9.5%

*Volume percentages do not equal 100% due to visitation to multiple regions within the state.

- regional sample size not adequate to estimate percentage of visitation

Table 20: Japanese Spending in North Carolina

Category	Percent of Total	Spending	% Growth from 2014
Lodging	50.8%	\$7.3M	-12.4%
Restaurants	12.3%	\$1.8M	-9.9%
Auto Rental	9.0%	\$1.3M	-19.8%
Clothing/Jewelry Stores	6.1%	\$870,106	-17.7%
Supermarkets	5.9%	\$847,301	-10.0%
Business to Business	1.4%	\$206,955	-34.3%
Specialty Retail	1.1%	\$163,001	+11.4%
Automotive Repair/Service/Parts	1.1%	\$158,342	+15.0%
Department Stores	1.1%	\$153,788	-29.6%
Health Care	0.9%	\$127,309	-39.3%
Sub Total	89.9%	\$12.9M	
Total	100.0%	\$14.3M	-14.9%

- Japanese visitors to North Carolina spend the largest proportion of their total spending on lodging (50.8%) than any other country of origin to North Carolina, but the smallest proportion on retail in general (16.1%).
- Japanese visitors also allocate a higher than average proportion of spending on auto rental than other countries of origin.

Table 21: Japanese Visitor Volume 2008-2015

Japanese Visitor Volume	2008	2009	2010	2011	2012	2013	2014	2015
	35,227	26,679 (-24.3%)	30,111 (+12.9%)	32,383 (+7.5%)	29,902 (-7.7%)	28,150 (-5.9%)	29,677 (+5.4%)	28,627 (-3.5%)

- Visitation from Japanese travelers decreased four percent from 2014, but remain slightly above 2013 levels.
- Japan ranks seventh in terms of international visitation and fifth in overseas visitation to North Carolina.

Table 22: 2015 Regional Japanese Visitors

Japanese Visitor Volume	Coast	Piedmont	Mountains
% of Japanese Visitors to NC*	-	91.3%	-

*Volume percentages do not equal 100% due to visitation to multiple regions within the state.

- regional sample size not adequate to estimate percentage of visitation

Table 23: French Spending in North Carolina

Category	Percent of Total	Spending	% Growth from 2014
Lodging	30.5%	\$2.9M	+6.2%
Restaurants	13.5%	\$1.3M	+4.2%
Clothing/Jewelry Stores	10.8%	\$1.0M	-5.1%
Supermarkets	10.6%	\$991,898	+9.0%
Auto Rental	8.1%	\$758,582	-7.6%
Radio TV & Stereo Stores	2.5%	\$235,436	-48.5%
Department Stores	2.1%	\$197,058	-28.2%
Other Travel & Entertainment	2.0%	\$186,429	-37.6%
Specialty Retail	1.7%	\$155,331	+4.4%
Oil	1.6%	\$146,754	-30.2%
Sub Total	83.2%	\$7.8M	
Total	100.0%	\$9.4M	-5.1%

- French visitors to North Carolina spend less than one-third of their total spending on lodging – less than most other European visitors, but more than most Asian or South American markets.
- French spending on in restaurants and supermarkets increased in 2015, as did spending in specialty retail.

Table 24: French Visitor Volume 2008-2015

French Visitor Volume	2008	2009	2010	2011	2012	2013	2014	2015
	19,262	19,327 (+0.3%)	22,072 (+14.2%)	25,913 (+17.4%)	28,326 (+9.3%)	26,350 (-7.0%)	30,090 (+14.2%)	25,440 (-15.5%)

- After an increase in 2014, French visitation decreased fifteen percent in 2015. France ranks eighth in terms of international visitation to the state.
- While volume decreased, spending did not decrease at the same rate. This resulted in a per person increase in spending of nearly sixteen percent.

Table 25: 2015 Regional French Visitors

French Visitor Volume	Coast	Piedmont	Mountains
% of French Visitors to NC*	10.5%	87.7%	10.1%

*Volume percentages do not equal 100% due to visitation to multiple regions within the state.

Table 26: Irish Spending in North Carolina

Category	Percent of Total	Spending	% Growth from 2014
Lodging	42.0%	\$2.3M	+9.8%
Restaurants	14.6%	\$816,506	+12.6%
Auto Rental	8.1%	\$453,371	-15.2%
Clothing/Jewelry Stores	7.8%	\$436,042	-9.3%
Supermarkets	4.4%	\$245,676	-11.7%
Other Travel & Entertainment	3.4%	\$190,926	+55.8%
Health Care	2.9%	\$163,021	+43.5%
Department Stores	2.6%	\$142,979	-27.1%
Radio TV & Stereo Stores	1.6%	\$88,219	-48.9%
Specialty Retail	1.2%	\$67,455	-19.1%
Sub Total	88.5%	\$5.0M	
Total	100.0%	\$5.5M	+14.1%

- Irish visitors to North Carolina spend a larger than average proportion of their total spending on lodging (42%), second only to Japanese visitors in terms of proportion to total spending.
- Visitors from Ireland also allocate a higher than average proportion of spending to auto rentals and restaurants.

Table 27: Irish Visitor Volume 2008-2015

Irish Visitor Volume	2008	2009	2010	2011	2012	2013	2014	2015
	8,253	6,240	6,220	8,243	8,693	11,699	14,302	15,154
		(-24.4%)	-0.3%	(+32.5%)	(+5.5%)	(+34.6%)	(+22.3%)	(+6.0%)

- Ireland saw growth again in 2015 in terms of visitors to North Carolina and set a new record with more than 15,000 visitors.
- The country ranks ninth for international visitors to North Carolina.

Table 28: 2015 Regional Irish Visitors

Irish Visitor Volume	Coast	Piedmont	Mountains
% of Irish Visitors to NC*	-	91.1%	-

*Volume percentages do not equal 100% due to visitation to multiple regions within the state.

- regional sample size not adequate to estimate percentage of visitation

** This report includes only the Republic of Ireland in Irish data. Northern Ireland is included with the UK data*

Table 29: Italian Spending in North Carolina

Category	Percent of Total	Spending	% Growth from 2014
Lodging	38.4%	\$2.3M	-10.5%
Restaurants	19.0%	\$1.2M	-11.8%
Auto Rental	11.9%	\$724,399	+0.4%
Clothing/Jewelry Stores	6.5%	\$394,874	-36.7%
Supermarkets	5.7%	\$343,875	-5.1%
Radio TV & Stereo Stores	3.3%	\$197,806	-20.9%
Oil	1.5%	\$90,504	-40.3%
Department Stores	1.1%	\$68,620	-53.3%
Specialty Retail	1.1%	\$63,752	-13.5%
Sub Total	88.4%	\$5.4M	
Total	100.0%	\$6.1M	-13.5%

- Of the fifteen top origin markets, Italian visitors to North Carolina spend the largest proportion of their total travel budget on restaurants (19%) and auto rental (12%). They also spend a larger than average proportion of their budget on lodging (38%).
- Visitors from Italy spend a smaller than average proportion of their total spending retail in general (18%).

Table 30: Italian Visitor Volume 2008-2015

Italian Visitor Volume	2008	2009	2010	2011	2012	2013	2014	2015
	12,316	11,152 (-9.5%)	12,177 (+9.2%)	13,234 (+8.7%)	13,945 (+5.4%)	14,196 (+1.8%)	15,390 (+8.4%)	14,292 (-7.1%)

- Italy, as a country of origin market, experienced decline in visitation from 2014 to 2015, but 2015 still remained the second highest for that country of origin in terms of visitors to North Carolina.
- Italy ranks tenth in terms of North Carolina's international markets.

Table 31: 2015 Regional Italian Visitors

Italian Visitor Volume	Coast	Piedmont	Mountains
% of Italian Visitors to NC*	-	89.9%	-

*Volume percentages do not equal 100% due to visitation to multiple regions within the state.
 - regional sample size not adequate to estimate percentage of visitation

Table 32: Brazilian Spending in North Carolina

Category	Percent of Total	Spending	% Growth from 2014
Lodging	21.5%	\$1.3M	-18.0%
Sporting Goods Stores	11.8%	\$709,940	-49.3%
Clothing/Jewelry Stores	10.8%	\$645,664	-46.8%
Auto Rental	10.3%	\$618,680	-7.9%
Restaurants	9.0%	\$540,087	-22.3%
Supermarkets	8.3%	\$497,660	-31.4%
Radio TV & Stereo Stores	7.6%	\$456,631	-52.9%
Department Stores	2.9%	\$176,116	-48.0%
Specialty Retail	2.0%	\$119,705	-37.3%
Discount Stores	1.5%	\$88,270	-39.0%
Sub Total	85.7%	\$5.1M	
Total	100.0%	\$6.0M	-36.9%

- Brazilian visitors to North Carolina spend a much higher than average proportion of money in retail in general (44%) than visitors from other countries, with the exception of China and Mexico. Visitors from Brazil allocate the largest proportion of spending to sporting goods stores (12%) than any other top country.
- Brazilian visitors to North Carolina a smaller than average proportion of their total spending on restaurants (9%) when compared to all other origin markets.

Table 33: Brazilian Visitor Volume 2008-2015

Brazilian Visitor Volume	2008	2009	2010	2011	2012	2013	2014	2015
	12,745	13,212 (+3.7%)	18,883 (+42.9%)	22,665 (+20.0%)	18,960 (-16.3%)	24,262 (+28.0%)	21,996 (-9.3%)	12,236 (-44.4%)

- Brazilian visitor volume decreased by more than forty percent in 2015, and the country dropped to eleventh in terms of international visitation to the state.

Table 34: 2015 Regional Brazilian Visitors

Brazilian Visitor Volume	Coast	Piedmont	Mountains
% of Brazilian Visitors to NC*	-	90.2%	-

*Volume percentages do not equal 100% due to visitation to multiple regions within the state.

- regional sample size not adequate to estimate percentage of visitation

Table 35: Spanish Spending in North Carolina

Category	Percent of Total	Spending	% Growth from 2014
Lodging	24.6%	\$686,783	-2.5%
Restaurants	18.4%	\$515,536	+27.4%
Clothing/Jewelry Stores	12.3%	\$345,298	-9.3%
Supermarkets	10.1%	\$282,892	+6.1%
Auto Rental	5.7%	\$160,493	-20.7%
Radio TV & Stereo Stores	2.8%	\$76,964	-56.8%
Department Stores	2.6%	\$72,021	-16.4%
Other Travel & Entertainment	2.1%	\$57,998	-10.9%
Specialty Retail	1.9%	\$52,223	+2.9%
Health Care	1.5%	\$40,670	-3.1%
Oil	1.4%	\$39,727	-26.3%
Sub Total	83.3%	\$2.3M	
Total	100.0%	\$2.8M	-6.2%

- Spanish visitors to North Carolina spend a somewhat larger than average proportion of their total spending on restaurants (18%) than other international visitors, and spending in this category increased significantly from 2014 to 2015.
- Spending in supermarkets by Spanish visitors also increased in 2015 (+6%).

Table 36: Spanish Visitor Volume 2008-2015

Spanish Visitor Volume	2008	2009	2010	2011	2012	2013	2014	2015
	6,156	6,085 (-1.2%)	5,996 (-1.5%)	7,818 (+30.4%)	8,582 (+9.8%)	9,271 (+8.0%)	10,360 (+11.7%)	11,295 (+9.0%)

- Visitation to North Carolina from Spain increased for the fifth straight year, and is at a record level with more than 11,000 visitors in 2015.
- Spain ranks twelfth in terms of international visitation to North Carolina.

Table 37: 2015 Regional Spanish Visitors

Spanish Visitor Volume	Coast	Piedmont	Mountains
% of Spanish Visitors to NC*	-	89.2%	-

*Volume percentages do not equal 100% due to visitation to multiple regions within the state.

- regional sample size not adequate to estimate percentage of visitation

Table 38: Australian Spending in North Carolina

Category	Percent of Total	Spending	% Growth from 2014
Lodging	22.4%	\$872,899	-5.0%
Clothing/Jewelry Stores	14.0%	\$546,716	+0.8%
Restaurants	9.6%	\$376,292	-5.1%
Supermarkets	7.4%	\$287,976	-12.1%
Auto Rental	6.2%	\$241,147	-3.5%
Automotive Repair/Service/Parts	4.8%	\$186,430	-33.1%
Department Stores	2.9%	\$113,277	-55.8%
Specialty Retail	2.7%	\$107,116	+5.4%
Business to Business	2.5%	\$97,199	+11.0%
Other Travel & Entertainment	2.0%	\$78,878	+9.9%
Oil	1.9%	\$74,689	-26.4%
Radio TV and Stereo Stores	1.7%	\$65,840	-1.4%
Discount Stores	1.5%	\$58,129	-34.7%
Sub Total	79.6%	\$3.1M	
Total	100.0%	\$3.9M	-15.9%

- Australian visitors to North Carolina spend a less than average proportion of their NC travel dollars in lodging when compared to other countries of origin.
- Visitors from Australia spend a larger than average proportion of their total spending in retail in general. Forty percent of their total spending is in retail.

Table 39: Australian Visitor Volume 2008-2015

Australian Visitor Volume	2008	2009	2010	2011	2012	2013	2014	2015
	12,769	12,018 (-5.9%)	13,997 (+16.5%)	15,072 (+7.7%)	11,136 (-26.1%)	10,172 (-8.7%)	11,166 (+9.8%)	10,276 (-8.0%)

- Australian visitation decreased eight percent in 2015, but the volume remained higher than 2013 visitation.
- Australia is ranked thirteen in terms of origin markets for NC international visitation.

Table 40: 2015 Regional Australian Visitors

Australian Visitor Volume	Coast	Piedmont	Mountains
% of Australian Visitors to NC*	-	78.8%	17.4%

*Volume percentages do not equal 100% due to visitation to multiple regions within the state.

- regional sample size not adequate to estimate percentage of visitation

Table 41: South Korean Spending in North Carolina

Category	Percent of Total	Spending	% Growth from 2014
Lodging	21.8%	\$1.0M	+13.5%
Clothing/Jewelry Stores	12.5%	\$598,467	-1.7%
Restaurants	12.7%	\$606,466	+9.6%
Supermarkets	12.7%	\$605,632	+28.7%
Auto Rental	8.2%	\$389,394	+33.7%
Department Stores	3.7%	\$177,942	-19.9%
Automotive Repair/Service/Parts	3.5%	\$167,378	+112.9%
Radio TV & Stereo Stores	2.6%	\$126,375	+18.0%
Oil	2.4%	\$114,249	-0.8%
Specialty Retail	2.1%	\$98,799	+10.6%
Business to Business	1.9%	\$90,258	+1.2%
Furniture/Equipment Stores	1.9%	\$89,475	+79.9%
Sub Total	86.0%	\$4.1M	
Total	100.0%	\$4.8M	+11.4%

- South Korean visitors to the state spend a larger than average proportion of their total spending in supermarkets (13%) and still spend nearly thirteen percent of their total spending in restaurants, suggesting food and dining is very important while visiting.
- South Koreans also allocate a slightly larger than average proportion of their travel budgets on car rental/oil expenditures (11%).

Table 42: South Korean Visitor Volume 2008-2015

South Korean Visitor Volume	2008	2009	2010	2011	2012	2013	2014	2015
	13,276	13,606 (+2.5%)	12,666 (-6.9%)	12,690 (+0.2%)	10,781 (-15.0%)	9,562 (-11.3%)	10,049 (+5.1%)	10,106 (+0.6%)

- Visitation from South Korea increased only slightly from 2014 to 2015, but spending grew more than eleven percent.
- The country remains ranks fourteen in terms of international visitor volume to North Carolina.

Table 43: 2015 Regional South Korean Visitors

South Korean Visitor Volume	Coast	Piedmont	Mountains
% of South Korean Visitors to NC*	-	89.1%	-

*Volume percentages do not equal 100% due to visitation to multiple regions within the state.

- regional sample size not adequate to estimate percentage of visitation

Table 44: Swiss Spending in North Carolina

Category	Percent of Total	Spending	% Growth from 2014
Lodging	37.7%	\$2.0M	-6.4%
Restaurants	12.7%	\$659,742	+8.3%
Auto Rental	10.6%	\$547,969	+1.8%
Clothing/Jewelry Stores	7.2%	\$372,308	-19.9%
Supermarkets	5.3%	\$277,078	+12.6%
Department Stores	3.3%	\$172,817	+27.3%
Health Care	1.5%	\$77,794	-7.4%
Radio TV & Stereo Stores	1.4%	\$75,135	-42.7%
Specialty Retail	1.4%	\$73,893	-16.6%
Oil	1.4%	\$72,683	-4.7%
Other Travel & Entertainment	1.4%	\$72,055	-23.9%
Sub Total	84.0%	\$4.4M	
Total	100.0%	\$5.2M	-0.8%

- Visitors from Switzerland allocate a larger proportion of spending to auto rental (10.6%) than most other countries of origin, second to Italy (11.9%) and tied with Germany (also 10.6%).
- Swiss visitors to North Carolina also spend a larger than average proportion of their total spending on lodging (38%).
- Visitors from Switzerland spend a smaller proportion of their total spending in supermarkets (5.3%) than other countries. As well, they spend a smaller than average proportion on retail in general (24%).

Table 45: Swiss Visitor Volume 2008-2015

Swiss Visitor Volume	2008	2009	2010	2011	2012	2013	2014	2015
	8,686	7,906 (-9.0%)	8,974 (+13.5%)	9,875 (+10.0%)	8,755 (-11.3%)	8,145 (-7.0%)	8,549 (+5.0%)	8,509 (-0.5%)

- After a five percent increase in 2014, visitation to North Carolina from Switzerland remained flat in 2015.
- Switzerland ranks fifteen in terms of international visitation to North Carolina.

Table 46: 2015 Regional Swiss Visitors

Swiss Visitor Volume	Coast	Piedmont	Mountains
% of Swiss Visitors to NC*	-	79.3%	-

*Volume percentages do not equal 100% due to visitation to multiple regions within the state.

- regional sample size not adequate to estimate percentage of visitation

Table 47: Swedish Spending in North Carolina

Category	Percent of Total	Spending	% Growth from 2014
Lodging	17.9%	\$396,632	-31.2%
Clothing/Jewelry Stores	17.4%	\$385,496	-43.9%
Restaurants	15.0%	\$332,096	-27.3%
Supermarkets	11.6%	\$256,862	-33.3%
Auto Rental	5.2%	\$114,770	-38.5%
Department Stores	3.8%	\$85,340	-50.7%
Specialty Retail	3.5%	\$78,337	-5.9%
Automotive Repair/Service/Parts	3.5%	\$78,212	-73.9%
Radio TV & Stereo Stores	3.2%	\$71,598	-56.1%
Oil	2.1%	\$46,800	-45.8%
Other Travel & Entertainment	1.5%	\$33,836	-53.2%
Sub Total	77.4%	\$2.9M	
Total	100.0%	\$3.7M	-2.0%

- Swedish visitors to the state spend a smaller than average proportion of their total spending on lodging (18%).
- Visitors from Sweden, however, spend a larger proportion of their total spending on retail in general (42%), and on clothing/jewelry/accessories in particular (17%), than most other countries of origin. They also allocate a higher proportion of spending on restaurants/dining than other countries of origin (15%).

Table 48: Swedish Visitor Volume 2008-2015

Swedish Visitor Volume	2008	2009	2010	2011	2012	2013	2014	2015
	10,625	7,555 (-28.9%)	8,302 (+9.9%)	9,289 (+11.9%)	10,857 (+16.9%)	9,870 (-9.1%)	9,591 (-2.8%)	6,825 (-28.8%)

- Visitation from Sweden continued to decrease in 2015 and is at its lowest since tracking began.
- Sweden dropped to sixteen terms of international visitation and fourteen in overseas visitation to North Carolina.

Table 49: 2015 Regional Swedish Visitors

Swedish Visitor Volume	Coast	Piedmont	Mountains
% of Swedish Visitors to NC*	-	84.7%	-

*Volume percentages do not equal 100% due to visitation to multiple regions within the state.

- regional sample size not adequate to estimate percentage of visitation

The below tables represent aggregate “German-speaking Europe”.

Table 50: German Speaking Europe

Category	Percent of Total	Spending	% Growth from 2014
Lodging	33.7%	\$10.3M	+9.5%
Clothing/Jewelry Stores	12.4%	\$4.0M	-16.7%
Restaurants	12.4%	\$3.8M	+7.4%
Auto Rental	10.6%	\$3.3M	-6.9%
Supermarkets	7.6%	\$2.4M	+5.4%
Department Stores	2.4%	\$707,563	-24.2%
Oil	2.3%	\$759,671	-22.6%
Specialty Retail	1.9%	\$615,844	-6.9%
Other Travel & Entertainment	1.7%	\$548,122	-12.5%
Radio TV & Stereo Stores	1.4%	\$442,975	-52.6%
Sub Total	86.6%	\$26.9M	
Total	100.0%	\$30.9M	-3.5%

Table 51: German Speaking Europe Visitor Volume 2008-2015

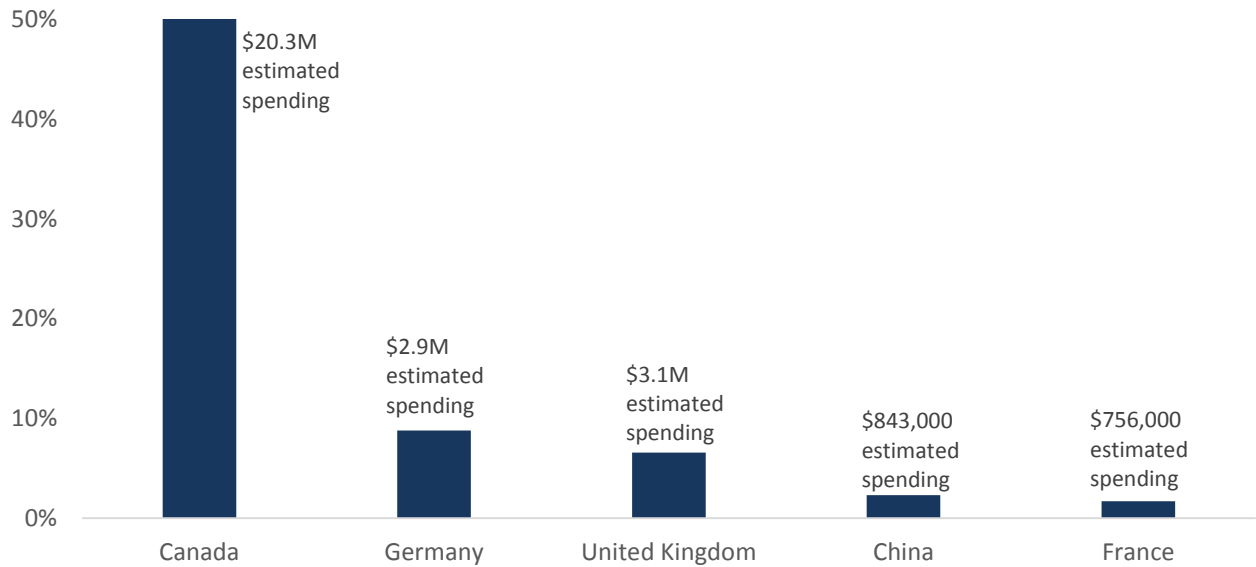
German Speaking Europe Visitor Volume	2008	2009	2010	2011	2012	2013	2014	2015
	76,157	64,937 (-10.8%)	66,925 (+3.1%)	70,928 (+6.0%)	82,602 (+16.5%)	88,406 (+7.0%)	95,332 (+7.8%)	86,942 (-8.8%)

Table 52: 2015 Regional German Speaking European Visitors

German Speaking European Visitor Volume	Coast	Piedmont	Mountains
% of German Speaking European Visitors to NC*	17.7%	79.9%	15.8%

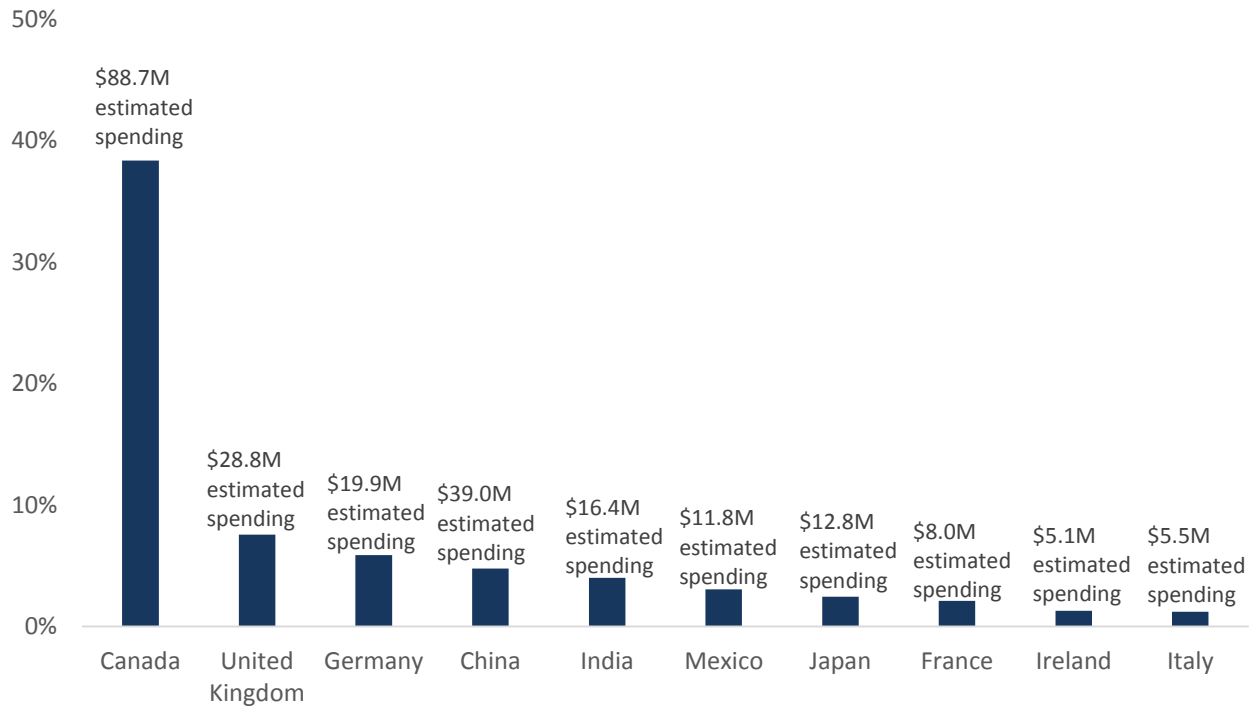
*Volume percentages do not equal 100% due to visitation to multiple regions within the state.
 - regional sample size not adequate to estimate percentage of visitation

Chart 3: Top International Countries of Origin to the Coastal Region of North Carolina and Their Estimated Spending In-State



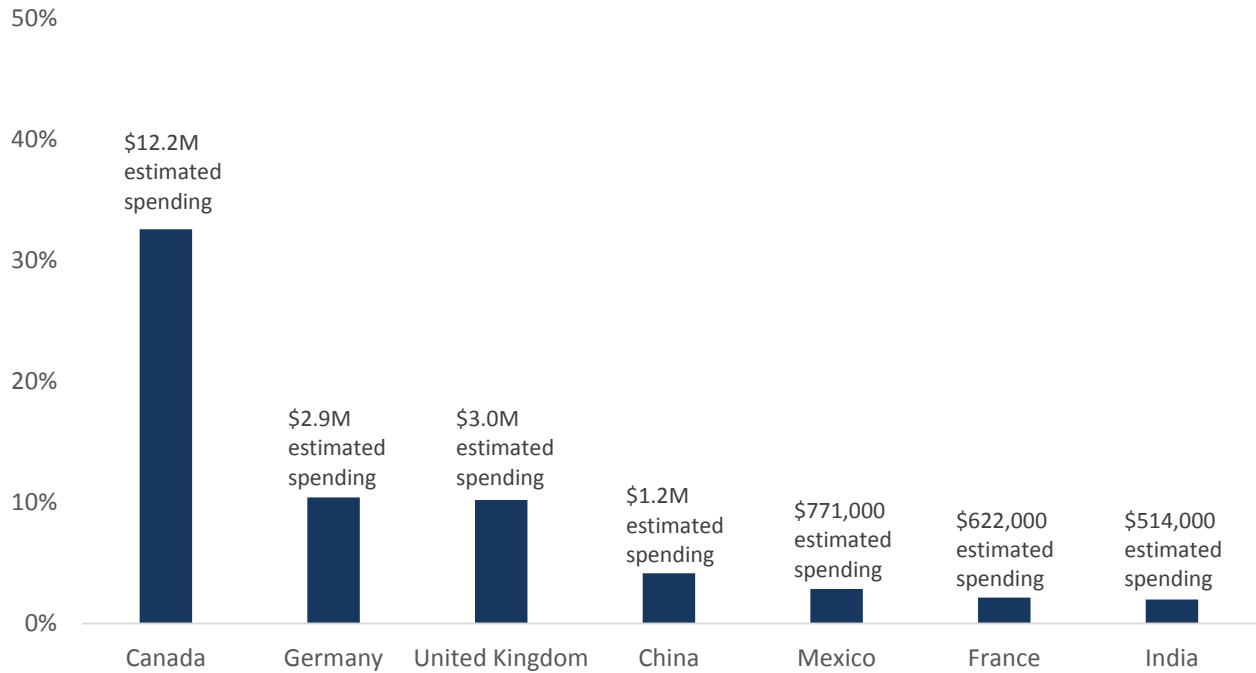
- Canadians represent the largest international market for the Coastal Region of North Carolina, and generate the most spending in the region.
- Slightly more Germans visit the Coastal Region than those from the UK, but the UK visitors spending is slightly higher than German spending.
- Rounding out the top five for the Coastal Region is China and France. Other countries of origin lack the sample size to adequately estimate visitation and spending.

Chart 4: Top International Countries of Origin to the Piedmont Region of North Carolina and Their Estimated Spending In-State



- Canadians also represent the largest international market for the Piedmont Region of North Carolina, and generate the most spending (nearly \$90 million).
- The UK and Germany are the top overseas markets for the Piedmont Region.
- While China is the fourth top market for the Piedmont Region, these visitors rank second in spending in the region with an estimated \$39 million.

Chart 5: Top International Countries of Origin to the Mountain Region of North Carolina and Their Estimated Spending In-State



- As with the other two regions, Canadians represent the largest international market for the Mountain Region of North Carolina, generating an estimated \$12 million in spending.
- While Germany and the UK send approximately the same number of visitors to the region in terms of visitor volume, visitors from the UK (rank #3) spend slightly more than the visitors from Germany.
- Other top countries of origin to the Mountain Region include China, Mexico, France and Italy. Additional countries of origin lack the sample size to adequately estimate visitation and spending.

Notes

- The data presented in the following report represents conservative projected estimates by Visit North Carolina based on assumptions derived from government data, market penetration data and aggregate Visa usage data provided by VisaVue Travel for the period of calendar year 2015.
- Spending data is only representative of what is spent in person in North Carolina. Air transportation and other spending outside the state are not included. Lodging estimates should be considered conservative, as pre-paid lodging is not included.
- The following estimates should not be directly compared to estimates for other states, nor for other particular regions, as international visitors are likely to travel to multiple states on single visits to the US. Doing so would not allow valid comparisons for these visitors to multiple states.
- Regional estimates should be used with caution due to small sample sizes with various countries of origin.
- VisaVue data is broken down by personal card and commercial card levels. For the purposes of this analysis, commercial and personal data was aggregated.