

2016 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 1.29 million international visitors travel to North Carolina. This includes nearly 500,000 Canadians.
- Approximately \$428 million in spending is associated with international visitors to North Carolina. The top ten origin countries represent 69 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 37 percent of market share and 25 percent of spending. The top overseas market is the UK with 7 percent of market share and spending. Germany (market share, 6.4%; spending, 6.2%) and China (market share, 4.8%; spending, 9.6%) 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 Switzerland spend the most with an average of \$668 per visitor, up 10 percent for per visitor spending from 2015. Visitors from China/Hong Kong followed closely behind the Swiss with an average per person spending of \$665, followed by visitors from Ireland with \$514 per visitor. Other top countries with high per person spending are Japan (\$473), Brazil (\$440), Italy (\$423) and Australia (\$413). 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 the UK spend a larger proportion of their total spending on lodging than other visitors to North Carolina. Visitors from China, Sweden, South Korea, Australia, Mexico and Brazil allocate a smaller proportion on lodging than other international visitors.
- Visitors from Italy, Spain and Ireland tend to spend a larger proportion of their travel budgets on dining, while visitors from India spend more in supermarkets, indicating that they may be cooking in their places of lodging rather than eating in restaurants.
- Visitors from China, Brazil, Mexico, Sweden, Australia and South Korea spend more of their total travel budget on retail in general, particularly in radio/TV/stereo stores (Brazil), department stores (China), specialty retail (Australia) and discount stores (Mexico). Nearly half of the Chinese spending in North Carolina is in the retail sector.
- German, Irish, Italian 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 6 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 (12 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	2016 Estimated Visitors	% change from 2015	2016 Total Spent	% change from 2015	Average Spending per Visitor
1	Canada	472,983	-4.9%	\$ 107,894,948	-11.0%	\$228
2	United Kingdom	91,784	-4.0%	\$ 31,136,628	-10.7%	\$339
3	Germany	83,139	+6.0%	\$ 26,753,681	+4.1%	\$322
4	China/Hong Kong	62,036	+11.3%	\$ 41,282,270	+0.6%	\$665
5	India	46,174	+3.0%	\$ 18,024,565	+5.2%	\$390
6	Mexico	39,762	+9.6%	\$ 12,199,770	-7.5%	\$307
7	Japan	31,670	+10.6%	\$ 14,986,708	+4.7%	\$473
8	France	26,203	+3.0%	\$ 8,820,520	-6.0%	\$337
9	Ireland	17,489	+15.4%	\$ 8,996,946	+60.8%	\$514
10	Italy	15,241	+6.6%	\$ 6,447,572	+6.3%	\$423
11	Spain	11,349	+0.5%	\$ 3,083,735	+10.3%	\$272
12	Australia	10,514	+2.3%	\$ 4,347,018	+11.7%	\$413
13	Brazil	10,415	-14.9%	\$ 4,577,389	-23.7%	\$440
14	South Korea	10,140	+0.3%	\$ 3,892,233	-18.4%	\$384
15	Switzerland	8,914	+4.8%	\$ 5,958,478	+15.0%	\$668
	Subtotal	937,812	-0.7%	\$ 298,402,459	-4.1%	\$318
	Other	356,939	+14.1%	\$ 129,916,503	-1.7%	\$365
	TOTAL	1,294,751	+3.0%	\$ 428,318,962	-3.4%	\$331

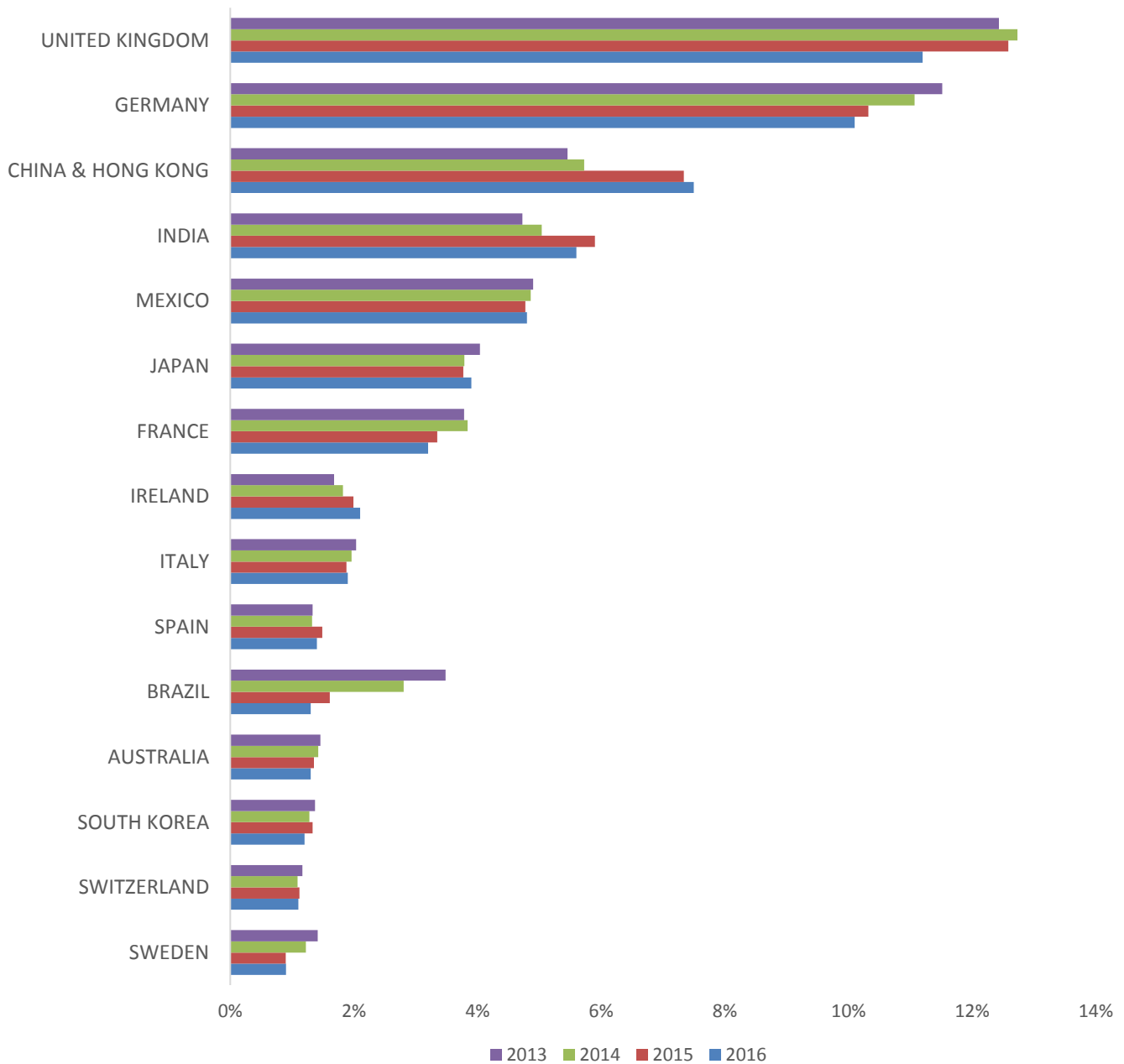
* Spending only includes what is spent in North Carolina.

** Canada is included in 2012 - 2016 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 2016.

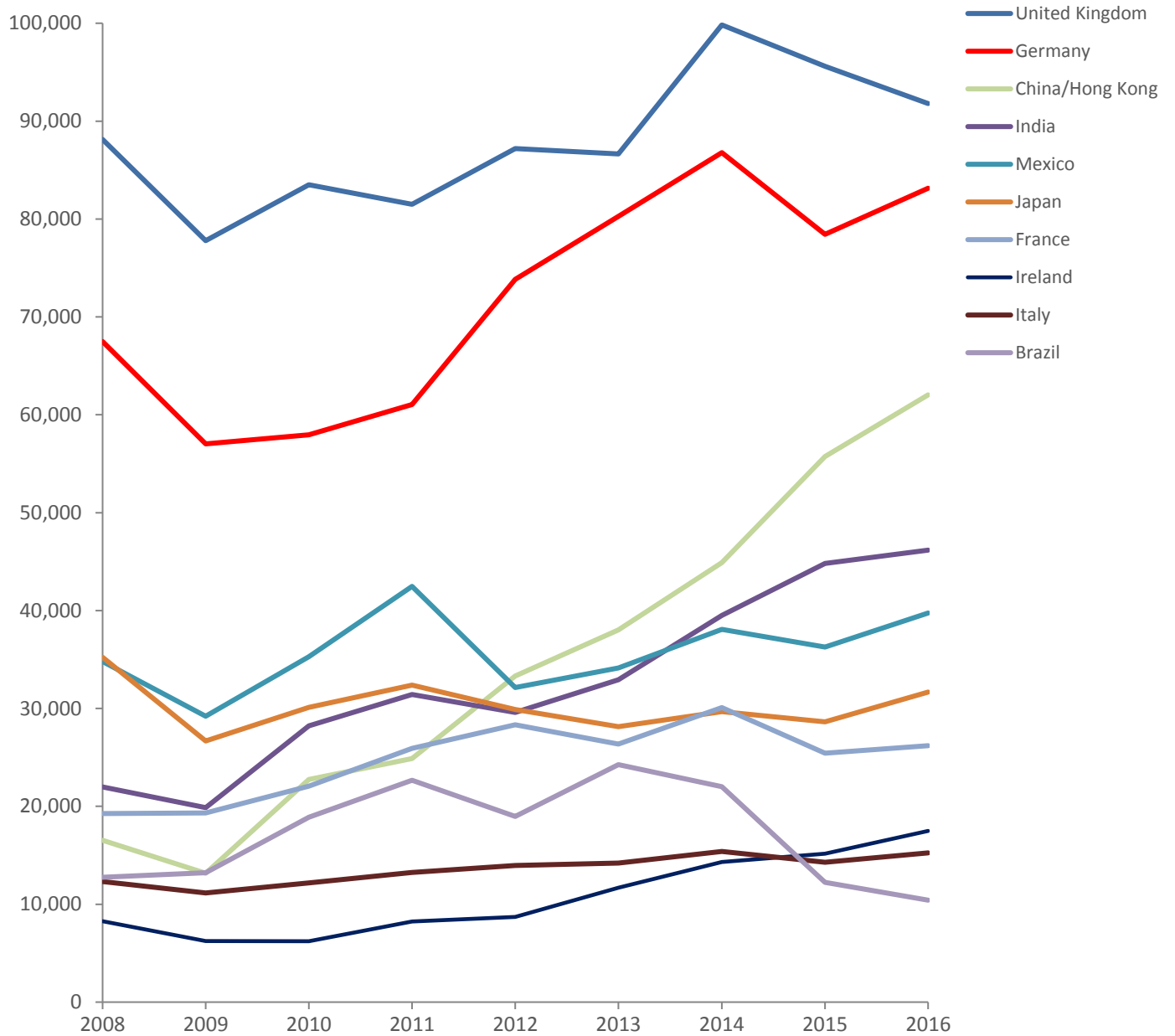
- Canada ranks first in terms of volume of international visitors to North Carolina, while the United Kingdom ranks first in terms of overseas visitation to the state with nearly 100,000 visitors. Visitation from the UK decreased four percent in 2016, but is still six percent higher than in 2013.
- Germany ranks third in terms of overall international visitation and second in overseas visitation. The number of German visitors to North Carolina increased six percent in 2016, as did their total spending (+4%).
- 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 \$107 million.
- Swiss visitors have the highest per person spending average at \$668, followed very closely by visitors from China (\$665). Visitors from Ireland (\$514), Japan (\$473), Brazil (\$440), Italy (\$423) and Australia (\$413) also had higher than average per person spending in North Carolina.

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 international visitors to North Carolina, but market share has dropped the last couple of years. Germany, China/Hong Kong and India are the next top markets in terms of market share.
- While German visitation is at near record levels, its market share of total visitation has dropped as emerging markets grow.
- The top 15 countries of origin, (not including Canada) represent 58 percent of market share of non-Canadian international visitation to North Carolina.

Chart 2: Volume Growth of Top International Markets to North Carolina 2008-2016



**Does not include Canadian visitation*

Table 2: Canadian Spending in North Carolina

Category	Percent of Total	Spending	% Growth from 2015
Lodging	28.8%	\$31.1M	-12.6%
Restaurants	13.0%	\$14.0M	-4.9%
Business to Business	8.6%	\$9.3M	+5.7%
Supermarkets	6.4%	\$6.9M	-18.1%
Oil	6.4%	\$6.9M	-16.3%
Auto Rental	5.4%	\$5.9M	-1.5%
Clothing/Jewelry/Accessories	4.5%	\$4.9M	-14.2%
Sporting Goods Stores	3.7%	\$4.0M	+43.7%
Automotive Repair/Service/Parts, etc.	2.8%	\$3.0M	-11.2%
Other Travel & Entertainment	2.4%	\$2.6M	-25.2%
Sub Total	82.1%	\$88.5M	
Total	100.0%	\$107.9M	-11.0%

- 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 (8.6% of dollars spent) and oil (6.4% 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 2012-2016

Canadian Visitor Volume	2012	2013	2014	2015	2016
	497,534	516,073 (-6.8%)	521,776 (+1.1%)	497,534 (-4.6%)	472,983 (-4.9%)

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

- Visitation to North Carolina by Canadians was down five percent from 2015, and spending was down eleven percent.
- Canada is the top international market for North Carolina with nearly five times the visitors of the next largest market of origin.

Table 4: 2016 Regional Canadian Visitors

Canadian Visitor Volume	Coast	Piedmont	Mountains
% of Canadian Visitors to NC*	15.1%	83.5%	8.1%

*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 2015
Lodging	33.8%	\$10.5M	-7.9%
Restaurants	15.0%	\$4.7M	-0.9%
Supermarkets	8.0%	\$2.5M	+1.9%
Clothing/Jewelry/Accessories	7.5%	\$2.3M	-18.0%
Auto Rental	7.2%	\$2.3M	-14.6%
Other Travel & Entertainment	2.5%	\$770,309	+0.7%
Business to Business	2.4%	\$749,058	-16.4%
Department Stores	2.4%	\$738,911	-19.1%
Radio/TV/Stereo Stores	2.3%	\$716,362	-22.3%
Health Care	1.5%	\$481,942	-18.6%
Sub Total	82.7%	\$25.7M	
Total	100.0%	\$31.1M	-10.7%

- For the UK market, lodging represents the largest spending category followed by retail in total and restaurants.
- Retail spending by UK visitors decreased in nearly all categories in 2016, though spending in supermarkets increased two percent.

Table 6: UK Visitor Volume 2008-2016

UK Visitor Volume	2008	2009	2010	2011	2012	2013	2014	2015	2016
	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%)	91,784 (-4.0%)

- Visitation to North Carolina by UK visitors dropped four percent in 2016, however 2016 still ranked as the third highest volume year for UK visitation.
- The UK remains the top international market for North Carolina behind Canada, and the top overseas market.

Table 7: 2016 Regional UK Visitors

UK Visitor Volume	Coast	Piedmont	Mountains
% of UK Visitors to NC*	11.7%	82.7%	13.6%

*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 2015
Lodging	31.1%	\$8.3M	+0.1%
Clothing/Jewelry/Accessories	14.8%	\$3.9M	+8.0%
Restaurants	12.3%	\$3.3M	+4.0%
Auto Rental	11.8%	\$3.2M	+15.9%
Supermarkets	8.1%	\$2.2M	+0.6%
Oil	2.3%	\$613,247	-10.7%
Department Stores	2.0%	\$540,218	+1.0%
Other Travel & Entertainment	1.9%	\$505,136	+6.1%
Radio/TV/Stereo Stores	1.7%	\$455,886	+23.9%
Specialty Retail	1.4%	\$380,027	-29.9%
Sub Total	87.4%	\$23.4M	
Total	100.0%	\$26.8M	+4.1%

- German visitors spend a larger proportion of their total spending on “auto rental” and consequently “oil” than visitors from other countries of origin. Fourteen percent of German spending in North Carolina is in car rental and oil/gas expenditures. Furthermore, spending on auto rentals by Germans increased nearly sixteen percent in 2016.
- Spending on clothing/jewelry/accessories (+8.0%) and in restaurants (+4.0%) also increased from 2015 to 2016.

Table 9: German Visitor Volume 2008-2016

German Visitor Volume	2008	2009	2010	2011	2012	2013	2014	2015	2016
	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%)	83,139 (+6.0%)

- After a decrease in 2015, German visitation bounced back and increased six percent in 2016.
- Germany remains third in international visitation and second in terms of overseas visitation to North Carolina.

Table 10: 2016 Regional German Visitors

German Visitor Volume	Coast	Piedmont	Mountains
% of German Visitors to NC*	16.1%	80.3%	17.0%

*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 2015
Clothing/Jewelry/Accessories	22.0%	\$9.1M	-0.7%
Lodging	16.0%	\$6.6M	+3.2%
Supermarkets	10.8%	\$4.5M	+4.0%
Restaurants	10.3%	\$4.3M	+13.9%
Department Stores	5.9%	\$2.4M	0.0%
Radio TV & Stereo Stores	5.6%	\$2.3M	-50.5%
Auto Rental	4.7%	\$2.0M	+14.0%
Furniture/Equipment Stores	2.0%	\$824,263	-0.8%
Specialty Retail	1.6%	\$680,759	-28.5%
Health Care	1.4%	\$590,476	-0.7%
Sub Total	80.4%	\$33.2M	
Total	100.0%	\$41.3M	+0.6%

- 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 nearly half (48%) of their total spending in retail in general.
- Though Chinese visitors spend a less than average proportion of total spending in restaurants and auto rentals/oil when compared to other countries, spending in restaurants and on auto rentals increased in 2016 (+14%).

Table 12: Chinese Visitor Volume 2008-2016

Chinese Visitor Volume	2008	2009	2010	2011	2012	2013	2014	2015	2016
	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%)	62,036 (+11.3%)

- Visitation to North Carolina by Chinese visitors continued its growth from 2015 to 2016 (+11%).
- China ranks fourth in terms of international visitation to North Carolina, and third in overseas visitation.
- Chinese visitors have the second highest per person spending of all international visitors to the state (\$665), just below the Swiss visitors. Per person spending by Chinese visitors actually decreased in 2016 (-10%), but the overall increased impact of this market was realized by the increased volume.

Table 13: 2016 Regional Chinese Visitors

Chinese Visitor Volume	Coast	Piedmont	Mountains
% of Chinese Visitors to NC*	6.1%	90.6%	9.6%

*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 2015
Lodging	32.4%	\$5.8M	-4.3%
Supermarkets	16.8%	\$3.0M	+11.6%
Restaurants	10.0%	\$1.8M	+13.5%
Clothing/Jewelry/Accessories	8.4%	\$1.5M	+16.7%
Radio/TV/Stereo Stores	6.8%	\$1.2M	+32.4%
Auto Rental	3.8%	\$681,680	+4.5%
Department Stores	3.2%	\$581,490	+12.1%
Furniture/Equipment Stores	1.5%	\$269,040	+23.3%
Other Emerging	1.5%	\$271,541	+15.8%
Healthcare	1.3%	\$226,599	+67.8%
Discount Stores	1.2%	\$215,084	-2.5%
Sub Total	86.8%	\$15.6M	
Total	100.0%	\$18.0M	+5.2%

- Visitors to North Carolina from India spend the largest proportion of their spending in North Carolina on lodging, supermarkets and restaurants.
- Indian visitors to North Carolina spend a slightly less than average proportion of their total spending on restaurants, but the largest proportion of spending in supermarkets as compared to other countries of origin (17%).

Table 15: Indian Visitor Volume 2008-2016

Indian Visitor Volume	2008	2009	2010	2011	2012	2013	2014	2015	2016
	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%)	46,174 (+3.0%)

- Indian visitation to North Carolina increased three percent in 2016 and reached a new record volume.
- India ranks fifth in terms of international visitation and fourth in overseas visitation to North Carolina.

Table 16: 2016 Regional Indian Visitors

Indian Visitor Volume	Coast	Piedmont	Mountains
% of Indian Visitors to NC*	-	95.3%	-

*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 17: Mexican Spending in North Carolina

Category	Percent of Total	Spending	% Growth from 2015
Lodging	21.2%	\$2.6M	+0.1%
Clothing/Jewelry/Accessories	17.7%	\$2.2M	-14.7%
Supermarkets	11.5%	\$1.4M	-3.6%
Restaurants	10.8%	\$1.3M	+4.3%
Auto Rental	7.0%	\$853,295	-4.2%
Discount Stores	3.7%	\$451,415	-18.4%
Department Stores	3.6%	\$434,671	-24.6%
Radio TV & Stereo Stores	2.8%	\$343,311	-24.8%
Drug Stores & Pharmacies	1.6%	\$192,134	+49.1%
Specialty Retail	1.5%	\$185,712	-57.2%
Sub Total	81.2%	\$9.9M	
Total	100.0%	\$12.2M	-7.5%

- Mexican visitors spend a lower than average proportion of their total spending on lodging than visitors from other countries, just 21 percent of their total spending in the state.
- 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 (40%) of their spending in North Carolina is in retail.

Table 18: Mexican Visitor Volume 2008-2016

Mexican Visitor Volume	2008	2009	2010	2011	2012	2013	2014	2015	2016
	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%)	39,762 (+9.6%)

- Mexican visitation to the state increased nearly ten percent from 2015, and reached a new record volume level. However, the per person spending decreased nearly 16 percent from 2015.
- The country ranks sixth in terms of international visitation to the state.

Table 19: 2016 Regional Mexican Visitors

Mexican Visitor Volume	Coast	Piedmont	Mountains
% of Mexican Visitors to NC*	-	89.2%	10.0%

*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 2015
Lodging	48.8%	\$7.3M	+0.4%
Restaurants	12.6%	\$1.9M	+6.8%
Auto Rental	8.7%	\$1.3M	+0.7%
Clothing/Jewelry Stores	6.5%	\$978,345	+12.4%
Supermarkets	6.5%	\$973,711	+14.9%
Business to Business	1.5%	\$219,495	+6.1%
Specialty Retail	1.5%	\$226,934	+39.2%
Health Care	1.5%	\$220,596	+73.3%
Department Stores	1.1%	\$161,996	+5.3%
Sub Total	88.6%	\$13.3M	
Total	100.0%	\$15.0M	+4.7%

- Japanese visitors to North Carolina spend the largest proportion of their total spending on lodging (49%) than any other country of origin to North Carolina, but spend below average on retail in general (17%).
- Japanese visitors allocate a slightly higher than average proportion of spending on auto rental than other countries of origin.

Table 21: Japanese Visitor Volume 2008-2016

Japanese Visitor Volume	2008	2009	2010	2011	2012	2013	2014	2015	2016
	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%)	31,670 (+10.6%)

- Visitation from Japanese travelers increased nearly 11 percent from 2015, but remained slightly below 2011 levels.
- Japan ranks seventh in terms of international visitation and fifth in overseas visitation to North Carolina.

Table 22: 2016 Regional Japanese Visitors

Japanese Visitor Volume	Coast	Piedmont	Mountains
% of Japanese Visitors to NC*	8.3%	90.7%	8.8%

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

Table 23: French Spending in North Carolina

Category	Percent of Total	Spending	% Growth from 2015
Lodging	30.1%	\$2.7M	-7.1%
Restaurants	14.3%	\$1.3M	+0.1%
Clothing/Jewelry Stores	10.2%	\$901,001	-15.7%
Supermarkets	10.6%	\$931,678	-6.1%
Auto Rental	7.4%	\$650,426	-14.3%
Radio TV & Stereo Stores	2.3%	\$205,183	-12.8%
Department Stores	2.2%	\$193,776	-1.7%
Specialty Retail	2.1%	\$183,654	+18.2%
Other Travel & Entertainment	2.0%	\$178,285	-4.4%
Oil	1.4%	\$124,978	-14.8%
Sub Total	82.6%	\$7.3M	
Total	100.0%	\$8.8M	-6.0%

- French visitors to North Carolina spend just 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 specialty retail increased in 2016, but spending in most other categories decreased from last year.

Table 24: French Visitor Volume 2008-2016

French Visitor Volume	2008	2009	2010	2011	2012	2013	2014	2015	2016
	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%)	26,203 (+3.0%)

- After a decrease in 2015, French visitation increased three percent in 2016. France ranks eighth in terms of international visitation to the state.
- While volume increased, spending did not. As visitor volume increased and total spending decreased, the results were a decrease of nearly 9 percent in per person spending.

Table 25: 2016 Regional French Visitors

French Visitor Volume	Coast	Piedmont	Mountains
% of French Visitors to NC*	10.8%	87.3%	10.7%

*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 2015
Lodging	47.5%	\$4.3M	+81.8%
Restaurants	16.5%	\$1.5M	+82.2%
Auto Rental	11.6%	\$1.0M	+131.1%
Clothing/Jewelry Stores	5.5%	\$496,018	+13.8%
Supermarkets	3.7%	\$329,620	+34.2%
Department Stores	1.6%	\$147,478	+3.1%
Other Travel & Entertainment	1.6%	\$146,222	-23.4%
Radio TV & Stereo Stores	1.2%	\$107,724	+22.1%
Sub Total	89.3%	\$8.0M	
Total	100.0%	\$9.0M	+60.8%

- Irish visitors to North Carolina spend a larger than average proportion of their total spending on lodging (48%), 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, but a smaller proportion of spending on retail in general.

Table 27: Irish Visitor Volume 2008-2016

Irish Visitor Volume	2008	2009	2010	2011	2012	2013	2014	2015	2016
	8,253	6,240 (-24.4%)	6,220 (-0.3%)	8,243 (+32.5%)	8,693 (+5.5%)	11,699 (+34.6%)	14,302 (+22.3%)	15,154 (+6.0%)	17,489 (+15.4%)

- Ireland saw very positive growth again in 2016 in terms of visitors to North Carolina and set a new record with more than 17,000 visitors.
- The country ranks ninth for international visitors to North Carolina.

Table 28: 2016 Regional Irish Visitors

Irish Visitor Volume	Coast	Piedmont	Mountains
% of Irish Visitors to NC*	-	91.8%	-

*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

** 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 2015
Lodging	42.6%	\$2.7M	+17.9%
Restaurants	19.4%	\$1.3M	+8.8%
Auto Rental	11.1%	\$716,445	-1.1%
Clothing/Jewelry Stores	5.3%	\$340,225	-13.8%
Supermarkets	5.6%	\$359,200	+4.5%
Radio TV & Stereo Stores	2.1%	\$135,990	-31.3%
Oil	2.1%	\$133,578	+47.6%
Department Stores	1.0%	\$66,507	-3.1%
Sub Total	89.2%	\$5.8M	
Total	100.0%	\$6.4M	+6.3%

- Of the fifteen top origin markets, Italian visitors to North Carolina spend the largest proportion of their total travel budget on restaurants (19%). They also spend a larger than average proportion of their budget on auto rentals (11%) and lodging (43%).
- Visitors from Italy spend a smaller than average proportion of their total spending retail in general (15%).

Table 30: Italian Visitor Volume 2008-2016

Italian Visitor Volume	2008	2009	2010	2011	2012	2013	2014	2015	2016
	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%)	15,241 (+6.6%)

- Visitor volume from Italy increased more than six percent from 2015 to 2016, and is the second highest on record 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: 2016 Regional Italian Visitors

Italian Visitor Volume	Coast	Piedmont	Mountains
% of Italian Visitors to NC*	-	89.8%	-

*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

Table 32: Spanish Spending in North Carolina

Category	Percent of Total	Spending	% Growth from 2015
Lodging	25.5%	\$784,990	+14.3%
Restaurants	19.2%	\$591,214	+14.7%
Clothing/Jewelry Stores	11.4%	\$350,964	+1.6%
Supermarkets	11.6%	\$357,789	+26.5%
Auto Rental	6.1%	\$187,674	+16.9%
Radio TV & Stereo Stores	2.4%	\$73,973	-3.9%
Oil	1.9%	\$58,036	+46.1%
Department Stores	1.9%	\$57,056	-20.8%
Health Care	1.6%	\$50,196	+61.4%
Other Travel & Entertainment	1.6%	\$48,673	-16.1%
Specialty Retail	1.4%	\$41,857	-19.9%
Sub Total	84.4%	\$2.6M	
Total	100.0%	\$3.1M	+10.3%

- Spanish visitors to North Carolina spend a larger than average proportion of their total spending on restaurants (19%) than other international visitors, and spending in this category increased significantly from 2015 to 2016 (+15%).
- Spending by Spanish visitors also increased in lodging, supermarkets, auto rental and oil.
- Spanish visitors to North Carolina spend less than average on lodging in proportion to total spending than other international visitors.

Table 33: Spanish Visitor Volume 2008-2016

Spanish Visitor Volume	2008	2009	2010	2011	2012	2013	2014	2015	2016
	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%)	11,349 (+0.5%)

- Visitation to North Carolina from Spain increased only slightly in 2016, but is at a record level with more than 11,000 visitors in 2016.
- Spain ranks eleventh in terms of international visitation to North Carolina.

Table 34: 2016 Regional Spanish Visitors

Spanish Visitor Volume	Coast	Piedmont	Mountains
% of Spanish Visitors to NC*	-	88.8%	-

*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

Table 35: Australian Spending in North Carolina

Category	Percent of Total	Spending	% Growth from 2015
Lodging	20.9%	\$912,297	+4.5%
Clothing/Jewelry Stores	10.6%	\$462,917	-15.3%
Restaurants	10.5%	\$457,403	+21.6%
Supermarkets	8.4%	\$364,608	+26.6%
Specialty Retail	5.9%	\$255,294	+138.3%
Auto Rental	5.5%	\$240,717	-0.2%
Business to Business	3.6%	\$156,324	+60.8%
Automotive Repair/Service/Parts	3.4%	\$147,704	-20.8%
Department Stores	3.3%	\$144,593	+27.6%
Sporting Goods Stores	1.9%	\$82,273	+95.3%
Other Travel & Entertainment	1.8%	\$78,380	-0.6%
Oil	1.4%	\$59,528	-20.3%
Radio TV and Stereo Stores	1.2%	\$52,096	-20.9%
Sub Total	78.3%	\$3.4M	
Total	100.0%	\$4.4M	+11.7%

- 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. Nearly forty percent of their total spending is in retail.

Table 36: Australian Visitor Volume 2008-2016

Australian Visitor Volume	2008	2009	2010	2011	2012	2013	2014	2015	2016
	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%)	10,514 (+2.3%)

- Australian visitation increased two percent in 2016, and the country is ranked twelve in terms of international origin markets for North Carolina.

Table 37: 2016 Regional Australian Visitors

Australian Visitor Volume	Coast	Piedmont	Mountains
% of Australian Visitors to NC*	15.1%	75.6%	17.0%

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

Table 38: Brazilian Spending in North Carolina

Category	Percent of Total	Spending	% Growth from 2015
Lodging	22.7%	\$1.0M	-19.4%
Clothing/Jewelry Stores	10.7%	\$491,385	-23.9%
Supermarkets	10.4%	\$476,395	-4.3%
Restaurants	9.2%	\$420,837	-22.1%
Auto Rental	8.5%	\$387,693	-37.3%
Radio TV & Stereo Stores	8.3%	\$378,787	-17.0%
Sporting Goods Stores	6.7%	\$307,630	-56.7%
Department Stores	3.2%	\$145,077	-17.6%
Discount Stores	1.7%	\$77,809	-11.9%
Drug Stores & Pharmacies	1.5%	\$67,676	-10.6%
Specialty Retail	1.3%	\$58,444	-51.2%
Sub Total	84.1%	\$3.9M	
Total	100.0%	\$4.6M	-23.7%

- Brazilian visitors to North Carolina spend a much higher than average proportion of money in retail in general (42%) than visitors from other countries, second only to China.
- Brazilian visitors to North Carolina allocate the smallest proportion of their total spending on restaurants (9%) when compared to all other origin markets.

Table 39: Brazilian Visitor Volume 2008-2016

Brazilian Visitor Volume	2008	2009	2010	2011	2012	2013	2014	2015	2016
	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%)	10,415 (-14.9%)

- Brazilian visitor volume decreased fifteen percent in 2016, and the country dropped to thirteenth in terms of international visitation to the state.

Table 40: 2016 Regional Brazilian Visitors

Brazilian Visitor Volume	Coast	Piedmont	Mountains
% of Brazilian Visitors to NC*	-	89.0%	-

*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 2015
Lodging	20.6%	\$801,882	-22.7%
Restaurants	13.9%	\$539,454	-11.0%
Clothing/Jewelry Stores	12.7%	\$493,348	-17.6%
Supermarkets	10.9%	\$422,973	-30.2%
Auto Rental	9.7%	\$375,620	-3.5%
Department Stores	3.4%	\$132,891	-25.3%
Automotive Repair/Service/Parts	3.0%	\$115,516	-31.0%
Radio TV & Stereo Stores	2.0%	\$78,100	-38.2%
Oil	1.8%	\$71,382	-37.5%
Healthcare	1.5%	\$59,412	-3.4%
Specialty Retail	1.4%	\$56,383	-42.9%
Furniture/Equipment Stores	1.4%	\$54,659	-38.9%
Other Travel/Entertainment	1.4%	\$53,843	+12.7%
Sub Total	83.6%	\$3.3M	
Total	100.0%	\$3.9M	-18.4%

- South Korean visitors to the state spend a larger than average proportion of their total spending in retail (34%) and a slightly larger than average proportion of their travel budgets on car rental/oil expenditures (12%).
- Visitors to North Carolina from South Korea allocate a smaller than average proportion of total spending in the state to lodging.

Table 42: South Korean Visitor Volume 2008-2016

South Korean Visitor Volume	2008	2009	2010	2011	2012	2013	2014	2015	2016
	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%)	10,140 (+0.3%)

- Visitation from South Korea increased only slightly from 2015 to 2016, but spending decreased more than eighteen percent.
- The country remains ranks fourteen in terms of international visitor volume to North Carolina.

Table 43: 2016 Regional South Korean Visitors

South Korean Visitor Volume	Coast	Piedmont	Mountains
% of South Korean Visitors to NC*	-	87.4%	-

*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 44: Swiss Spending in North Carolina

Category	Percent of Total	Spending	% Growth from 2015
Lodging	39.7%	\$2.4M	+21.0%
Restaurants	13.2%	\$788,245	+19.5%
Auto Rental	11.0%	\$657,511	+20.0%
Clothing/Jewelry Stores	7.7%	\$459,389	+23.4%
Supermarkets	5.1%	\$301,377	+8.8%
Health Care	3.4%	\$203,507	+161.6%
Department Stores	2.3%	\$135,710	-21.5%
Radio TV & Stereo Stores	2.1%	\$123,295	+64.1%
Sporting Goods Stores	1.0%	\$62,315	+31.5%
Oil	1.0%	\$60,329	-17.0%
Specialty Retail	1.0%	\$57,489	-22.2%
Other Travel & Entertainment	1.0%	\$56,852	-21.1%
Sub Total	88.4%	\$5.3M	
Total	100.0%	\$6.0M	+15.0%

- Visitors from Switzerland spend a larger than average proportion of their total spending on lodging (40%) and auto rental (11%) than most other countries of origin.
- Swiss visitors spend a smaller proportion of their total spending in supermarkets (5%) than other countries. As well, they spend as smaller than average proportion on retail in general (23%).

Table 45: Swiss Visitor Volume 2008-2016

Swiss Visitor Volume	2008	2009	2010	2011	2012	2013	2014	2015	2016
	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%)	8,914 (+4.8%)

- After a slight decrease in visitation from Swiss visitors in 2015, visitation to North Carolina from Switzerland increased nearly five percent in 2016.
- Switzerland ranks fifteen in terms of international visitation to North Carolina.

Table 46: 2016 Regional Swiss Visitors

Swiss Visitor Volume	Coast	Piedmont	Mountains
% of Swiss Visitors to NC*	-	80.9%	-

*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 47: Swedish Spending in North Carolina

Category	Percent of Total	Spending	% Growth from 2015
Lodging	17.1%	\$423,255	+6.7%
Clothing/Jewelry Stores	15.5%	\$383,287	-0.6%
Restaurants	14.7%	\$363,735	+9.5%
Supermarkets	12.6%	\$312,501	+21.7%
Auto Rental	3.9%	\$96,418	-16.0%
Department Stores	3.6%	\$89,852	+5.3%
Automotive Repair/Service/Parts	3.3%	\$82,760	+5.8%
Radio TV & Stereo Stores	3.3%	\$81,728	+14.1%
Specialty Retail	2.8%	\$69,900	-10.8%
Other Travel & Entertainment	2.0%	\$50,105	+48.1%
Oil	1.7%	\$42,988	-8.1%
Sub Total	80.6%	\$2.0M	
Total	100.0%	\$2.5M	+11.6%

- Swedish visitors to the state spend a smaller than average proportion of their total spending on lodging (17%) and auto rentals (4%).
- Visitors from Sweden, however, spend a larger proportion of their total spending on retail in general (40%), and in supermarkets than other countries of origin (13%).

Table 48: Swedish Visitor Volume 2008-2016

Swedish Visitor Volume	2008	2009	2010	2011	2012	2013	2014	2015	2016
	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%)	7,644 (+12.0%)

- Visitation from Sweden increased twelve percent in 2016.
- Sweden remains ranked sixteen terms of international visitation and fourteen in overseas visitation to North Carolina.

Table 49: 2016 Regional Swedish Visitors

Swedish Visitor Volume	Coast	Piedmont	Mountains
% of Swedish Visitors to NC*	-	86.5%	-

*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

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

Table 50: German Speaking Europe

Category	Percent of Total	Spending	% Growth from 2015
Lodging	33.5%	\$10.7M	+4.1%
Clothing/Jewelry Stores	12.8%	\$4.4M	+9.4%
Restaurants	12.6%	\$4.1M	+6.7%
Auto Rental	11.6%	\$3.8M	+16.6%
Supermarkets	7.3%	\$2.5M	+1.6%
Department Stores	2.1%	\$675,928	-4.5%
Oil	1.9%	\$673,576	-11.3%
Radio TV & Stereo Stores	1.8%	\$579,181	+30.7%
Other Travel & Entertainment	1.6%	\$561,988	+2.5%
Specialty Retail	1.3%	\$437,517	-29.0%
Sub Total	86.5%	\$28.4M	
Total	100.0%	\$32.7M	+5.9%

Table 51: German Speaking Europe Visitor Volume 2008-2016

German Speaking Europe Visitor Volume	2008	2009	2010	2011	2012	2013	2014	2015	2016
	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%)	92,053 (+5.9%)

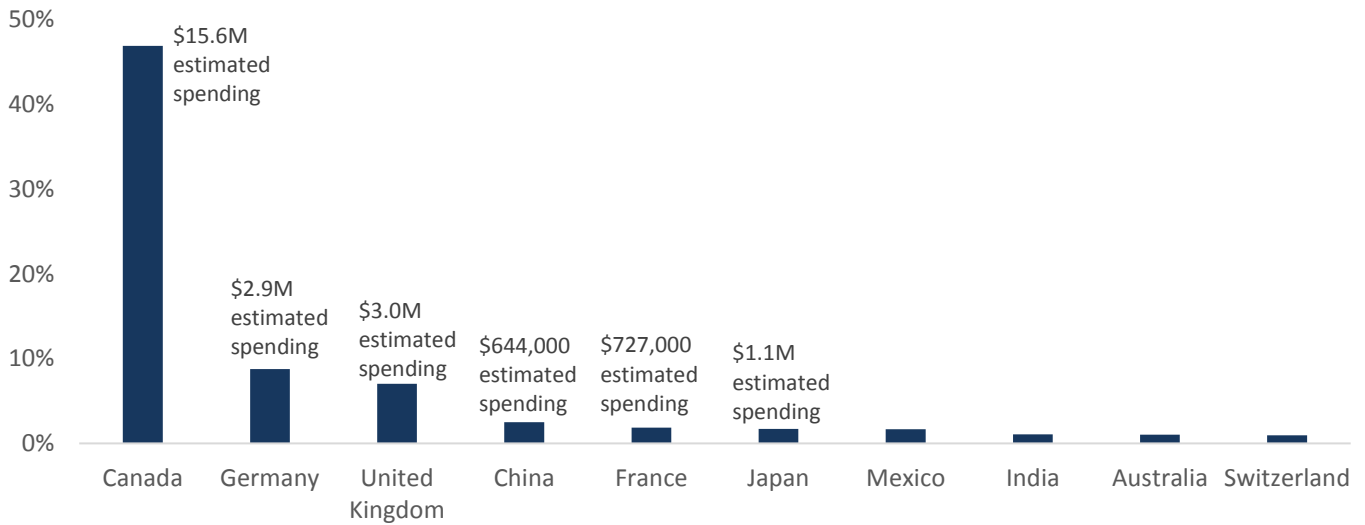
Table 52: 2016 Regional German Speaking European Visitors

German Speaking European Visitor Volume	Coast	Piedmont	Mountains
% of German Speaking European Visitors to NC*	16.0%	80.4%	16.8%

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

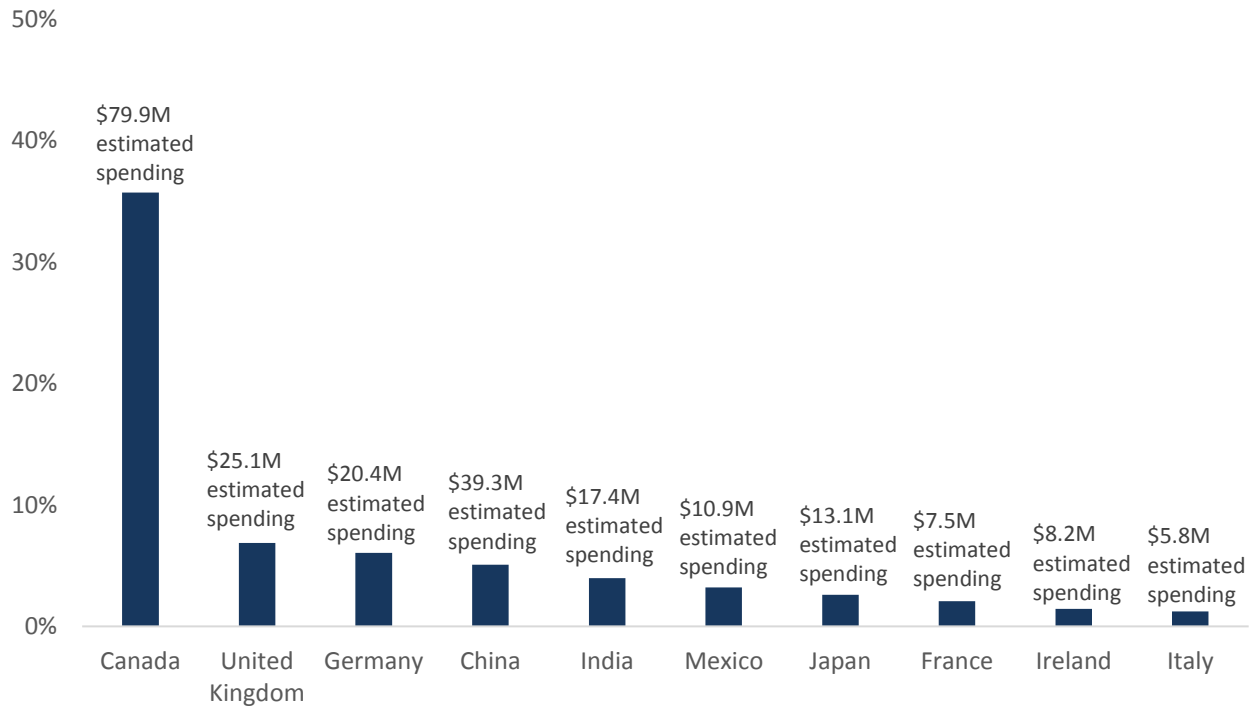
- regional sample size not adequate to estimate percentage of visitation

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



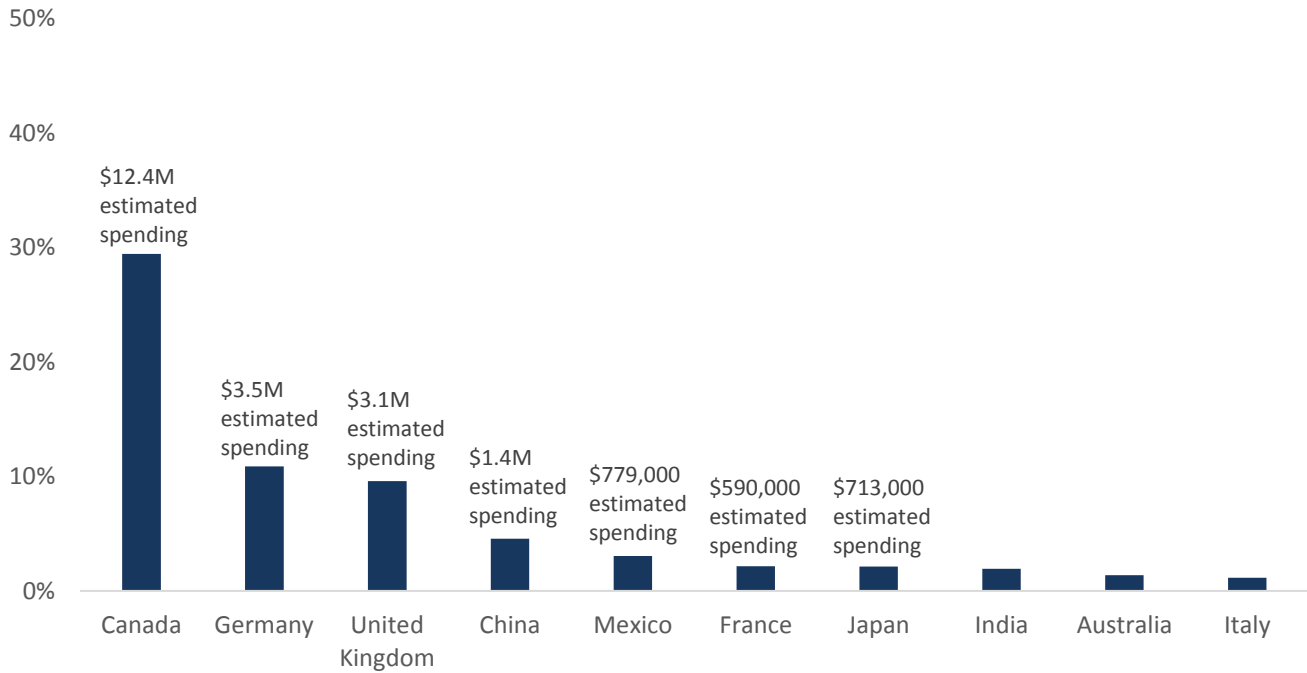
- Canadians represent the largest international market for the Coastal Region of North Carolina, and generate the most spending in the region.
- Slightly more Germans visit the Coastal Region than those from the UK, but the UK visitors spending is slightly higher than German spending.
- Rounding out the top six for the Coastal Region are China, France and Japan. 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 \$80 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.
- With an increase in German visitation statewide in 2016, this market jumped the UK market for the Mountain Region in terms of visitation and spending, and now ranks second in both indicators. The UK ranks third in visitation and spending in the region.
- Other top countries of origin to the Mountain Region include China, Mexico, France and Japan. 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 2016.
- 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.