

2017 North Carolina Regional Travel Summary

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



2017 North Carolina Regional Travel Summary

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

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2017 Domestic Coastal Region Travel Summary

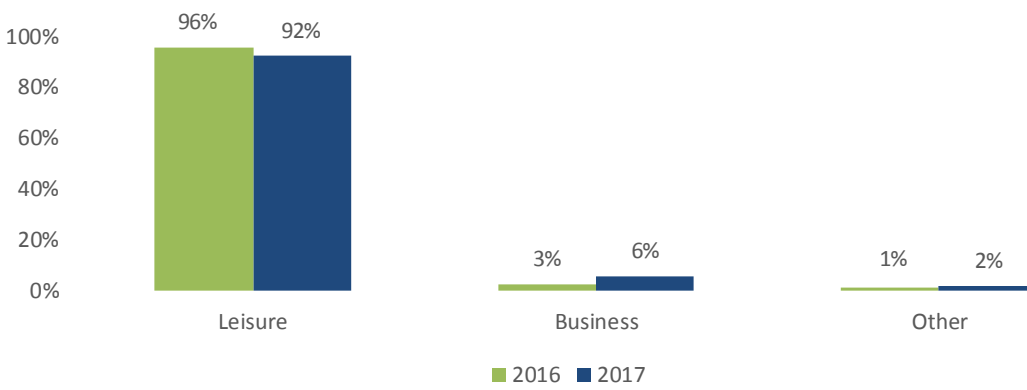
- ◆ In 2017, 23 percent of North Carolina visitors traveled to North Carolina’s Coastal Region, approximately 10.8 million person-trips (approximately 9.5 million overnight person-trips). For marketing purposes, the Coastal Region is made up of twenty-eight most eastern counties of North Carolina. *Note that the regional volume totals do not sum to the statewide volume total, as some visitors travel to multiple geographic regions in one visit.
- ◆ Ninety-one percent of all domestic visitors (and 92 percent of overnights) came to the Coastal Region for pleasure purposes, while six percent of visitors (6 percent of overnights) came to conduct business (includes meeting/convention).
- ◆ Summer (June - August) was the most popular season for travel to North Carolina’s Coastal Region, with thirty-seven percent of all 2017 coastal visitors and thirty-nine percent of overnights. Spring (March-May) and fall (September - November) followed with twenty-six percent and twenty percent of coastal visitors (27 percent and 19 percent of overnights, respectively). The winter season (December-February) was the least visited with seventeen percent (15 percent of overnights).
- ◆ Overnight visitors to the Coastal Region spent an average of 4.2 nights in the region in 2017.
- ◆ Thirty-nine percent of Coastal Region visitors lodged at a hotel/motel while thirty percent stayed in a private home. Sixteen percent stayed in a rental home and four percent stayed in a rental condo. Five percent stayed in a personal second home or condo. Approximately four percent of coastal overnights indicated that they lodged in a shared-economy property such as AirBnB or VRBO.
- ◆ The average travel party size for all Coastal Region visitors was 2.3 people. Thirty-four percent of travel parties to the region included children in the party in 2017.
- ◆ Ninety-one percent of overnight travelers to the Coastal Region drove (includes personal automobile, rental, motorcycle and RV), while six percent traveled by air.
- ◆ In 2017, the average household trip expenditure in the Coastal Region was \$1,075. The average household trip expenditure for overnight visitors to the Coastal Region was \$1,242. Daytrip parties to the Coastal Region spent approximately \$124 per visit.
- ◆ The top states of origin of *overnight* visitors to the Coastal Region were North Carolina (43%), Virginia (15%), New York (6%), Ohio (4%), Maryland (4%), Pennsylvania (4%), Florida (3%), Michigan (2%), New Jersey (2%) and South Carolina (2%).
- ◆ Fifty-one percent of all households (55 percent of overnight) that traveled to North Carolina’s Coastal Region in 2017 had a household income over \$75,000.
- ◆ In 2017, Raleigh/Durham (18%) was the top advertising market of origin for *overnight* travelers to the Coastal Region, followed by Norfolk-Portsmouth-Newport News (7%), Greensboro/High Point/Winston Salem (7%), Washington DC (6%) and Charlotte (6%).

Coastal Region Overnight Visitor Profile

Main Purpose of Visit

In 2017, ninety-two percent of domestic overnight visitors came to the Coastal Region for leisure purposes, which included visiting friends and relatives, outdoor recreation and entertainment/sightseeing. This was down from ninety-six percent in 2016. Approximately six percent of domestic overnight visitors came for general business, convention, seminar or other group meeting, while two percent traveled to the Coastal Region for other purposes.

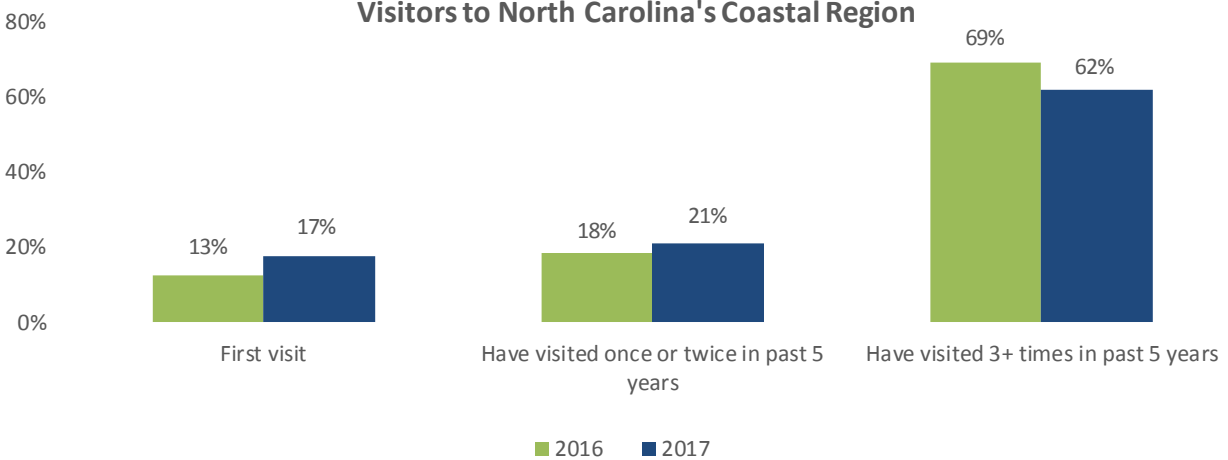
2017 Primary Purpose of Overnight Trip to North Carolina's Coastal Region



First Time Visitors

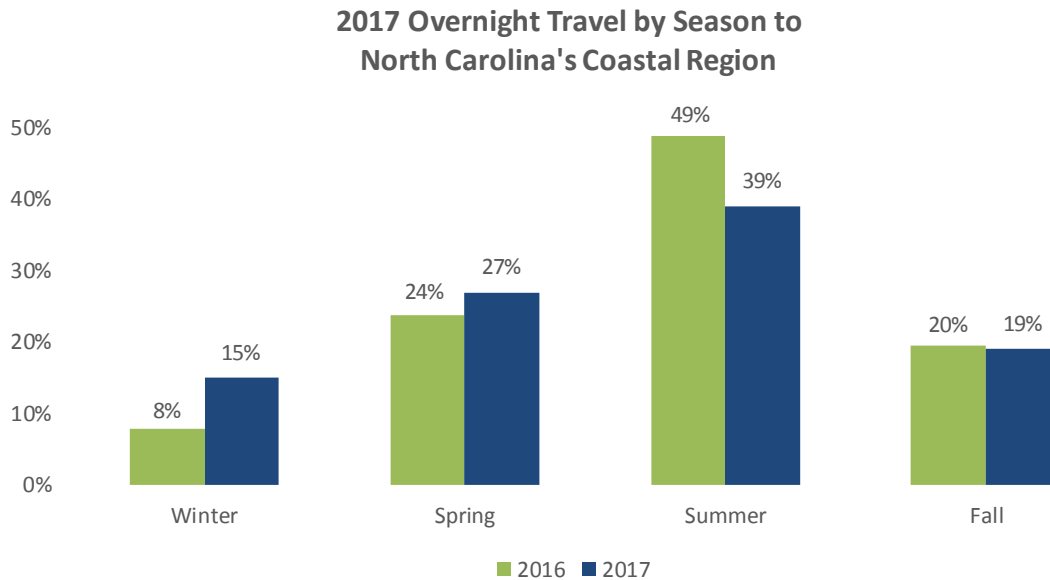
Seventeen percent of overnight visitors to the Coastal Region were first time visitors in 2017, up from thirteen percent in 2016. The majority of overnight coastal visitors are still repeat, and frequent, visitors.

2017 First Time vs. Repeat Visitors to North Carolina's Coastal Region



Travel Volume by Season

When examining visitation based on the typical seasonal schedule, the summer (June through August), with nearly forty percent of the region’s annual visitors, remains the most popular season of the year for overnight travel to North Carolina’s Coastal Region. In 2017, the proportion of winter (December through February) visitors increased from 2016 in terms of proportion of total to fifteen percent. Spring (March through May) drew twenty-seven percent of overnight visitors and fall (September through November) welcomed nineteen percent of the region’s annual overnight visitors.



Average Length of Stay

In 2017, an average of 4.2 nights was spent by visitors to North Carolina’s Coastal Region, down from 4.9 nights in 2016. Data indicates that out-of-state visitors stay an average of 5 nights, while in-state visitors stay an average of 3.1 nights.

Travel Party Size

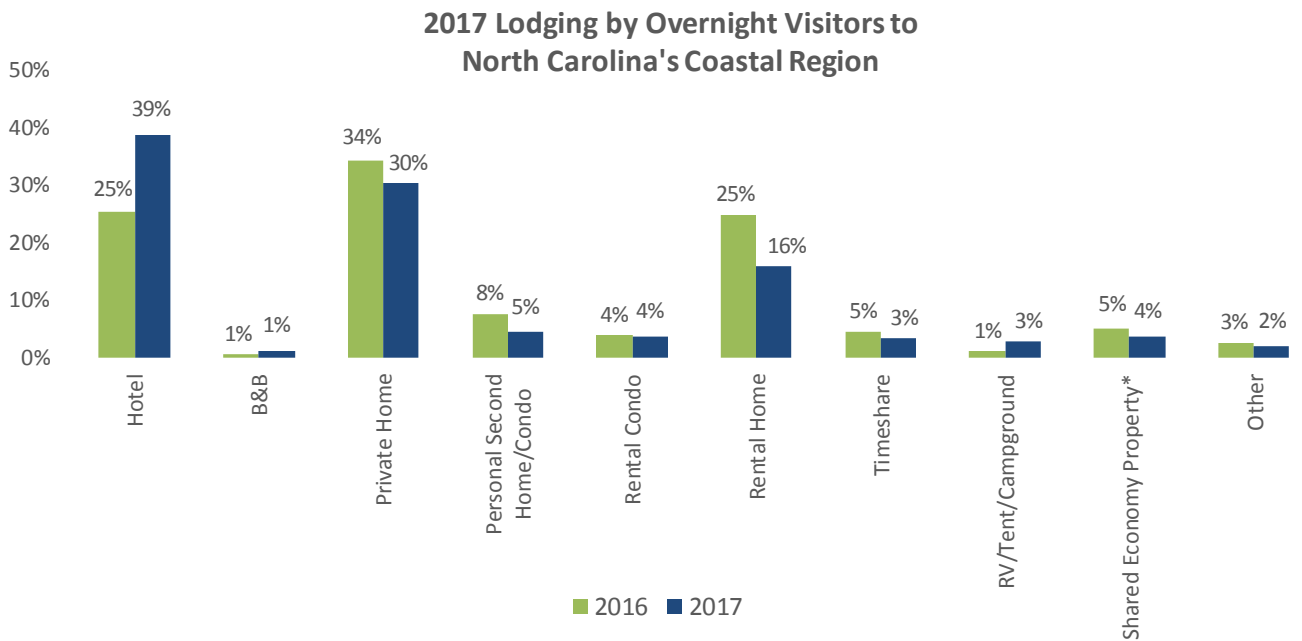
The average travel party size for all Coastal Region overnight visitors was 2.3 people.

Children on Trip

Thirty-four percent of overnight visitor parties to the Coastal Region included children, down from forty-one percent in 2016. Among those who traveled with children, the average number of children on trips was two children.

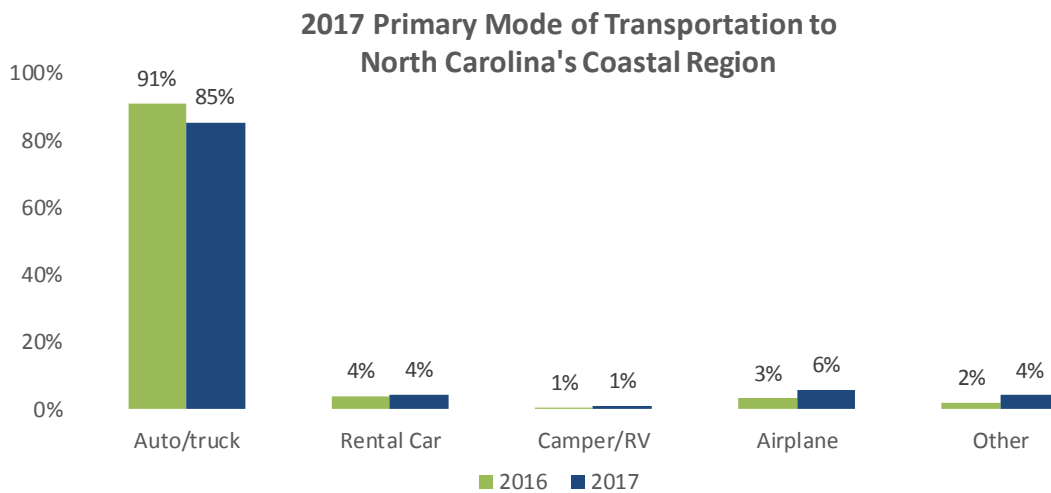
Lodging Used in Coastal Region

In 2017, nearly forty percent of Coastal Region visitors lodged at a hotel/motel, up from twenty-five percent in 2016. Thirty percent of the region’s visitors stayed in a private home, and sixteen percent stayed in a rental home. A new category was added to the survey in 2016, and the results reflected that approximately four percent of Coastal Region visitors chose to use some type of shared economy lodging, such as Airbnb or VRBO. It should be noted that some visitors use more than one type of accommodation during a visit, so totals equal more than 100%.



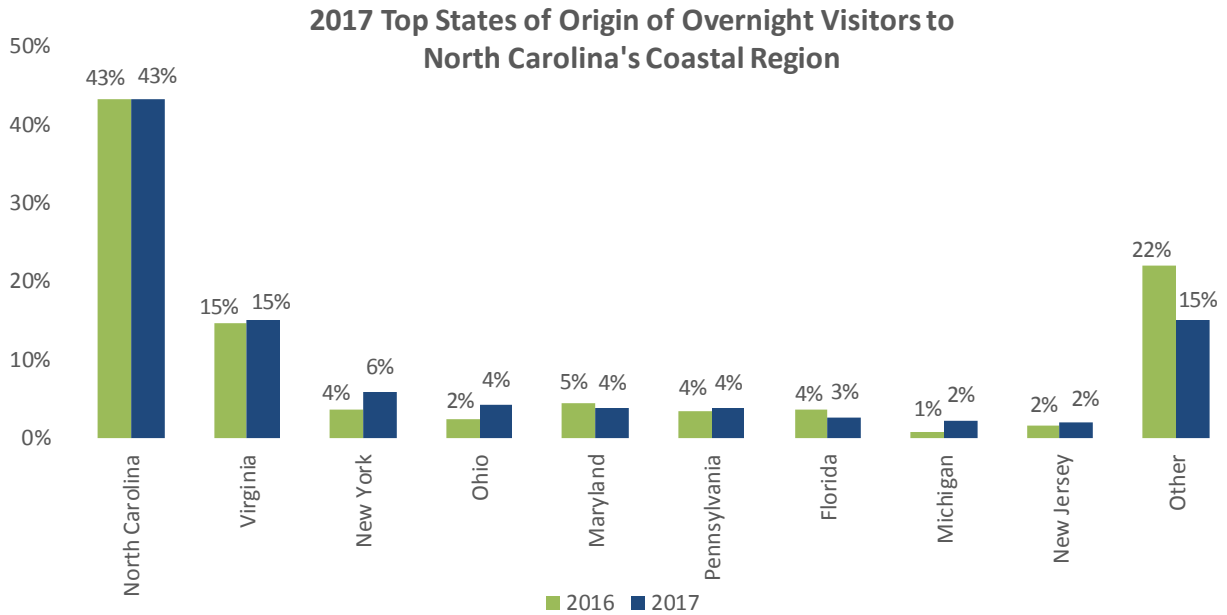
Mode of Transportation

In 2017, the personal auto was by far the dominant form of transportation (85%) for overnight visitors to the Coastal Region, while nearly six percent traveled by air.



Origin of Visitors

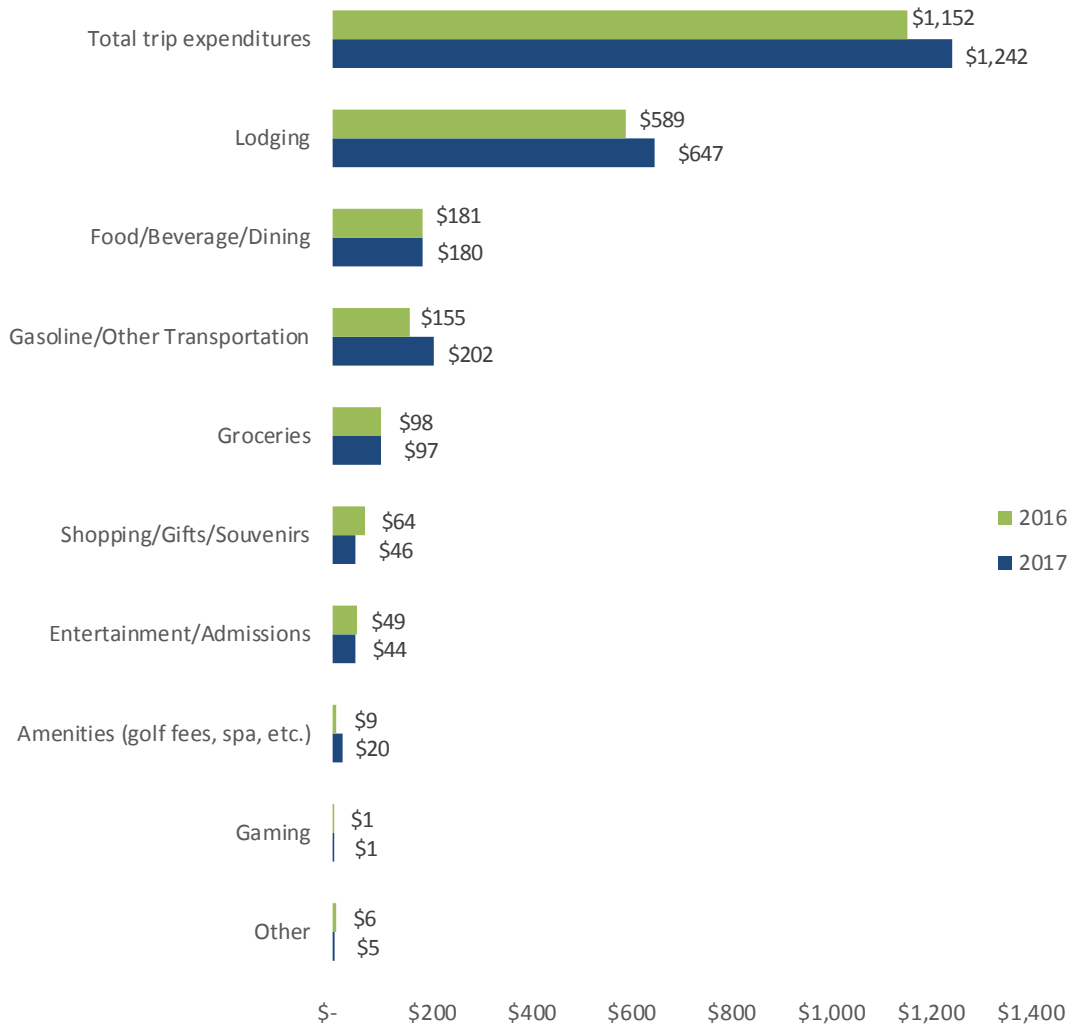
In 2017, the top states of origin for Coastal Region overnight visitors included North Carolina (43%), Virginia (15%), New York (6%), Ohio (4%), Maryland (4%) and Pennsylvania (4%). The proportion of in-state visitors was flat from 2016, however, the proportion of visitors from New York, Ohio and Michigan increased from 2016 to 2017.



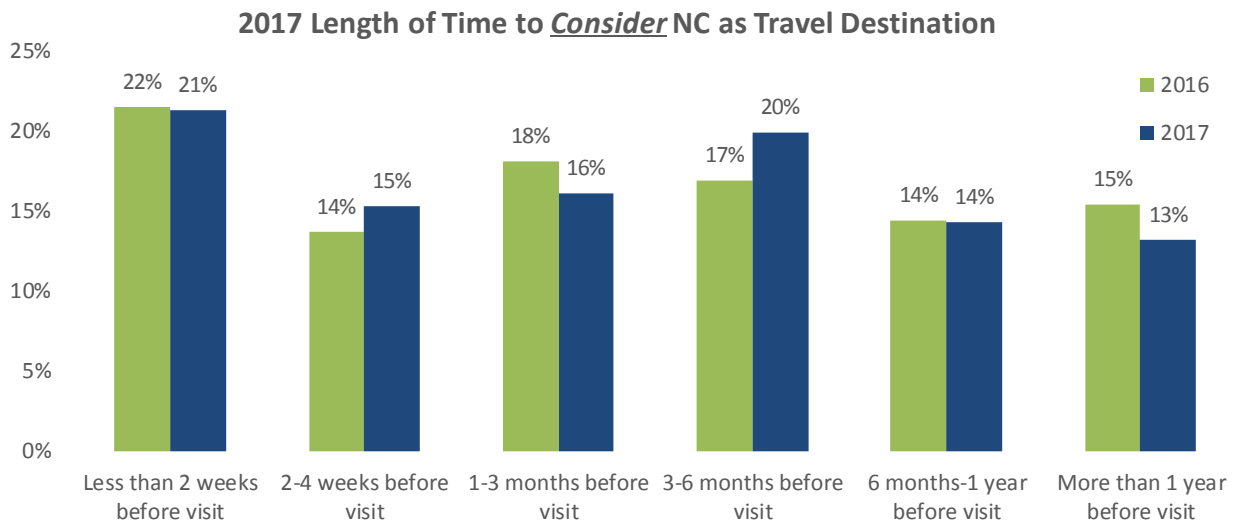
Amount Spent in Coastal Region

The average overnight visitor party spending per trip in the Coastal Region increased eight percent from 2016 to 2017. The bulk of the increase was in lodging and transportation expenses.

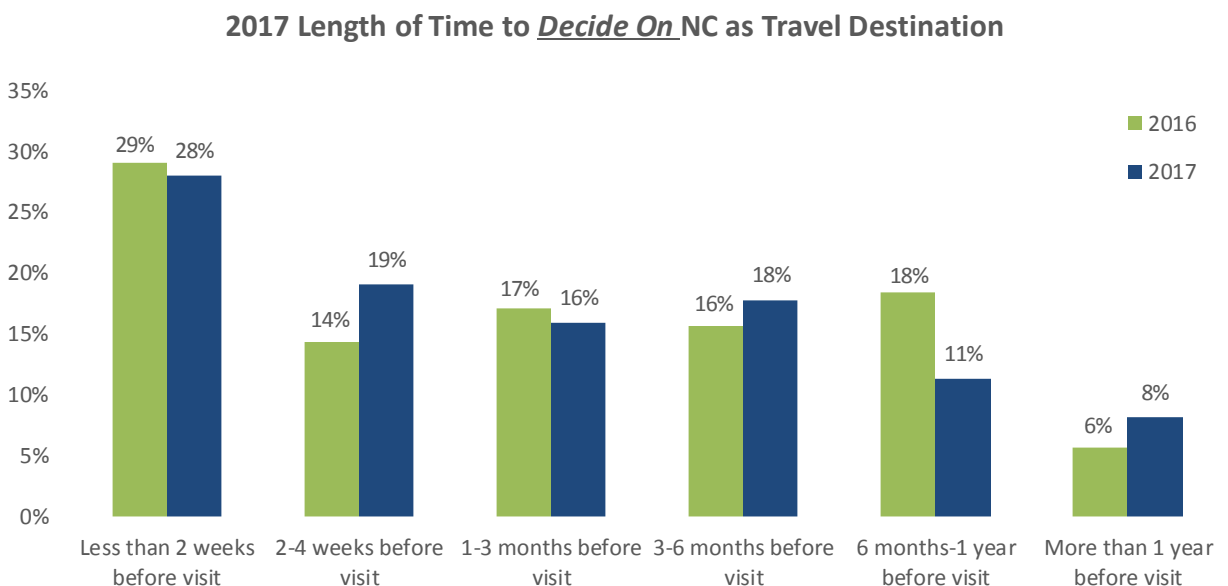
Average Trip Spending by Overnight Visitor Parties to North Carolina's Coastal Region



Travel Planning to Coastal Region



Coastal Region visitors typically consider and decide their vacation plans farther in advance than North Carolina visitors in general. More than a quarter of Coastal Region visitors considered the state at least six months ahead of travel and nearly twenty percent of them decided to visit at least six months ahead of travel. The proportion of the region’s overnight visitors who decided on the travel destination one month or less prior to travel increased somewhat from 2016 to 2017, though a higher proportion also decided on the destination more than a year prior to travel in 2017.



Activities

The following table provides information on activities participated in by coastal visitors in 2017. These are not indicative of purpose of trip, but what activities visitors participate in while in North Carolina. More than half of the overnight visitors to the region went to a beach and more than one-third shopped while visiting the coast. Other popular activities included visiting relatives (29%), visiting historic sites/churches (18%), rural sightseeing (16%), museums (16%), visiting a state park/monument/recreation area (15%) and fine dining (15%). ****Note that responses to this question are not mutually exclusive and percentages do not equal 100%. Therefore, proportions should not be aggregated to combine categories of activities. Also note that these activities do not imply purpose of trip.***

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

Activity	2017	2016
Beach	57.3%	62.5%
Shopping	34.4%	37.3%
Visiting Relatives	29.2%	26.4%
Historic Sites/Churches	18.2%	20.3%
Rural Sightseeing	16.1%	13.5%
Museums	15.9%	11.3%
State Park/Monument/Recreation area	15.3%	13.4%
Fine Dining	15.2%	24.2%
Visiting Friends	11.9%	16.8%
Wildlife Viewing	11.7%	8.0%
Fishing (fresh or saltwater)	11.4%	16.2%
Urban Sightseeing	10.9%	9.8%
National Park/Monument/Recreation area	8.6%	9.9%
Zoos/Aquariums/Aviaries	8.2%	6.3%
Craft Breweries	5.3%	6.5%
Nature Travel/Eco-touring	5.0%	2.1%
Nightclubs/Dancing	4.8%	4.8%
Golf	4.7%	5.5%
Biking/Road Biking/Cycling	4.7%	5.6%
Wine Tasting/Winery Tour	4.3%	3.7%
Local/folk arts/crafts	3.7%	2.4%
Whitewater Rafting/Kayaking/Canoeing	3.5%	1.8%
Old Homes/Mansions	3.3%	5.5%
Other nature (photography, rockhounding, etc.)	3.2%	5.9%
Bird Watching	3.1%	3.5%
Motor boat/jet ski	3.1%	3.3%
Gardens	3.0%	4.8%
Art Galleries	2.9%	4.8%
Hiking/Backpacking	2.9%	4.4%
Special Events/Festivals	1.7%	0.9%
Musical performance/show	1.7%	4.6%
Theme Park/Amusement Park/Water Park	1.6%	4.9%
Water skiing	1.2%	1.1%
Horseback Riding	1.1%	1.0%
Area where TV show or movie was filmed	1.0%	1.6%

Demographic Profile of North Carolina Coastal Region Overnight Visitors

Two-thirds (66.4%) of North Carolina Coastal Region overnight visitors are married and twenty percent of the region's visitors have never been married. Fourteen percent are divorced, widowed or separated.

The largest proportion of North Carolina Coastal Region overnight visitors classifies themselves as white (93%), and four percent classify themselves as black/African American. One percent listed their ethnicity as Asian/Pacific Islander.

The average Coastal Region overnight visitor is 46 years old and nearly two-thirds (64%) of regional overnight visitor parties have a household head with a college degree or higher.

The average household income of a visitor party to the Coastal Region in 2017 was \$90,310 with more than half (55%) of the visitor parties reporting a household income \$75,000 or more. Twenty-two percent had a household income of over \$125,000.

Sixty-three percent of overnight visitor parties reported that the head of household is employed, while twenty-one percent are retired. The remainder reported "not employed" as work status.

The average household size of a North Carolina Coastal Region overnight visitor party in 2017 was 2.9.

2017 Top Advertising Markets

In 2017, the top advertising markets sending overnight visitors to **North Carolina's Coastal Region** were Raleigh-Durham-Fayetteville (17.9%), Norfolk-Portsmouth-Newport News, VA (7.3%), Greensboro-High Point-Winston-Salem (7.1%), Washington DC (6.4%), Charlotte (6.0%), Wilmington (4.9%), Greenville-New Bern-Washington (4.3%), Philadelphia (4.2%) and Richmond-Petersburg, VA (3.8%). The share of visitors from Raleigh-Durham increased from fourteen percent in 2016 to nearly eighteen percent in 2017, and the share of visitors from Washington DC and Philadelphia increased as well. Advertising markets correspond with Nielsen's Designated Market Areas (DMAs).

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

<i>DMA of Origin</i>	<i>2017 % of Coastal Visitors</i>	<i>2016 % of Coastal Visitors</i>	<i>2017 Coastal Share of Total NC Visitors from DMA</i>	<i>2016 Coastal Share of Total NC Visitors from DMA</i>
Raleigh-Durham (Fayetteville)	17.9%	14.6%	27.8%	25.5%
Norfolk-Portsmouth-Newport News, VA	7.3%	8.0%	38.5%	42.9%
Greensboro-High Point-Winston Salem	7.1%	7.8%	21.3%	22.2%
Washington DC Metro	6.4%	5.5%	33.3%	17.5%
Charlotte	6.0%	4.6%	11.1%	11.1%
Wilmington	4.9%	1.5%	40.0%	23.5%
Greenville-New Bern-Washington	4.3%	8.9%	30.8%	27.7%
Philadelphia, PA	4.2%	2.7%	36.4%	17.5%
Richmond-Petersburg, VA	3.8%	6.6%	37.9%	45.9%
New York, NY	2.8%	2.7%	19.0%	11.3%
Greenville-Spartanburg-Asheville	2.6%	2.8%	12.3%	7.4%
Pittsburgh	1.9%	1.1%	33.3%	23.1%
Baltimore	1.9%	2.0%	23.8%	31.3%
Cincinnati	1.8%	0.4%	50.0%	16.7%
Albany-Schenectady-Troy	1.6%	0.1%	50.0%	0.0%
St. Louis	1.2%	0.4%	23.1%	14.3%
Charleston-Huntington	1.1%	0.1%	27.3%	0.0%
Austin	1.1%	0.1%	42.9%	0.0%
Myrtle Beach-Florence	1.0%	1.2%	15.8%	15.8%
Atlanta	1.0%	0.4%	3.7%	1.2%

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

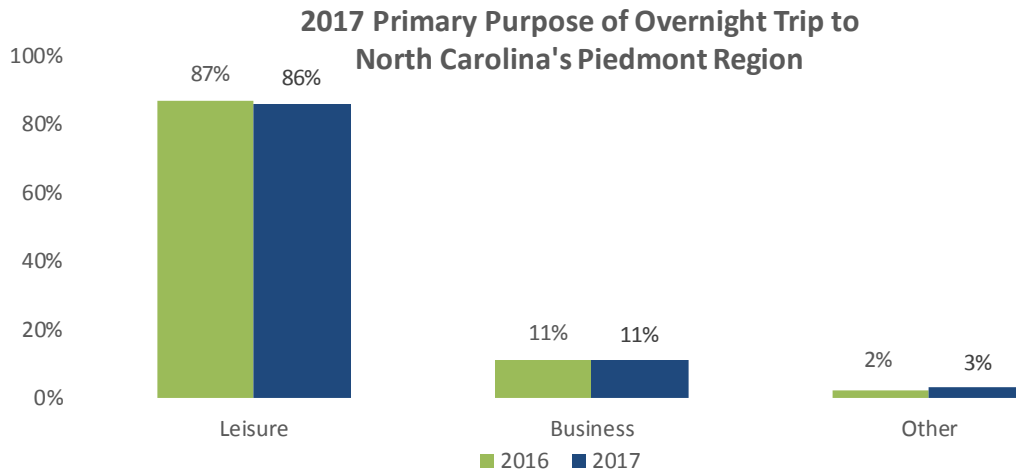
2017 Domestic Piedmont Region Travel Summary

- ◆ In 2017, 68 percent of North Carolina visitors traveled to North Carolina’s Piedmont Region, approximately 31.5 million person-trips (approximately 24.4 million overnight person-trips). For marketing purposes, the Piedmont Region is made up of the 49 most central counties of North Carolina. *Note that the regional volume totals do not sum to the statewide volume total, as some visitors travel to multiple geographic regions in one visit.
- ◆ Eighty-three percent of all domestic visitors (86 percent of overnights) came to the Piedmont Region for pleasure purposes, while thirteen percent of all visitors (11 percent of overnights, down from 17 percent in 2015) came to conduct business (includes meeting/convention).
- ◆ Travel to the Piedmont was more consistent seasonally than the other regions. Summer (June - August) welcomed the most visitors with twenty-seven percent. Fall (September - November) and winter (December - February) had the next highest proportion of visitors, with twenty-five percent of total visitors each. Spring (March - May) had twenty-four percent of the region’s annual visitors.
- ◆ Overnight visitors to the Piedmont Region spent an average of 3.3 nights in the region.
- ◆ Fifty percent of Piedmont Region visitors lodged in a hotel/motel, and forty-six percent also stayed in a private home. Two percent of overnight visitors to the region reported staying in a shared economy property such as AirBnB or VRBO.
- ◆ The average travel party size for all Piedmont Region visitors was 2 people. Twenty-four percent of all travel parties to the region included children in the party (26 percent of overnights).
- ◆ Eighty-one percent of all overnight travelers to the Piedmont Region drove (includes personal automobile, rental, and motorcycle), while fifteen percent traveled by air.
- ◆ In 2017, the average household trip expenditure in the Piedmont Region was \$466. The average household trip expenditure for overnight visitors to the Piedmont Region was \$596. Daytrip parties to the Piedmont region spent approximately \$148 per visit in 2017.
- ◆ The top states of origin of *overnight* visitors to the Piedmont Region in 2017 were North Carolina (36%), Virginia (8%), South Carolina (7%), New York (5%), Georgia (5%) and Florida (5%).
- ◆ Fifty percent of the households (54 percent of overnight) that traveled to North Carolina’s Piedmont Region in 2017 had a household income over \$75,000.
- ◆ In 2017, Raleigh/Durham/Fayetteville (11.6%), was the top advertising market of origin for *overnight* travelers to the Piedmont Region, followed by Charlotte (10.0%), Greensboro-High Point-Winston Salem (5.4%), Atlanta (4.2%), New York (4.2%), Greenville-New Bern-Washington (3.8%) and Greenville-Spartanburg-Asheville-Anderson (3.6%).

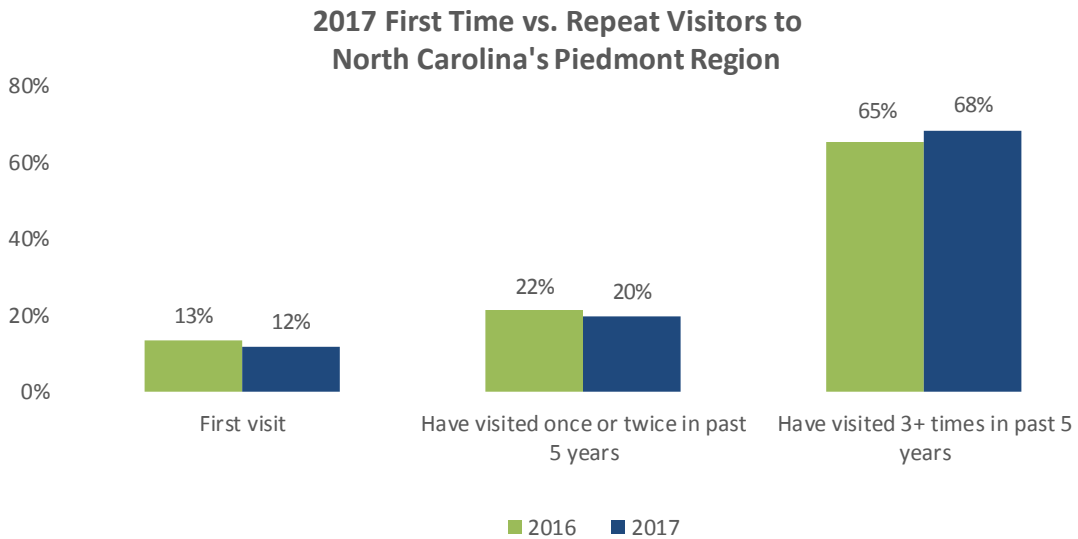
Piedmont Region Overnight Visitor Profile

Main Purpose of Visit

In 2017, eighty-six percent of domestic overnight visitors came to the Piedmont Region for leisure purposes, which included visiting friends and relatives, outdoor recreation and entertainment/sightseeing. This is up from seventy-two percent in 2014. Business travel visitors represented eleven percent of the region’s visitors.

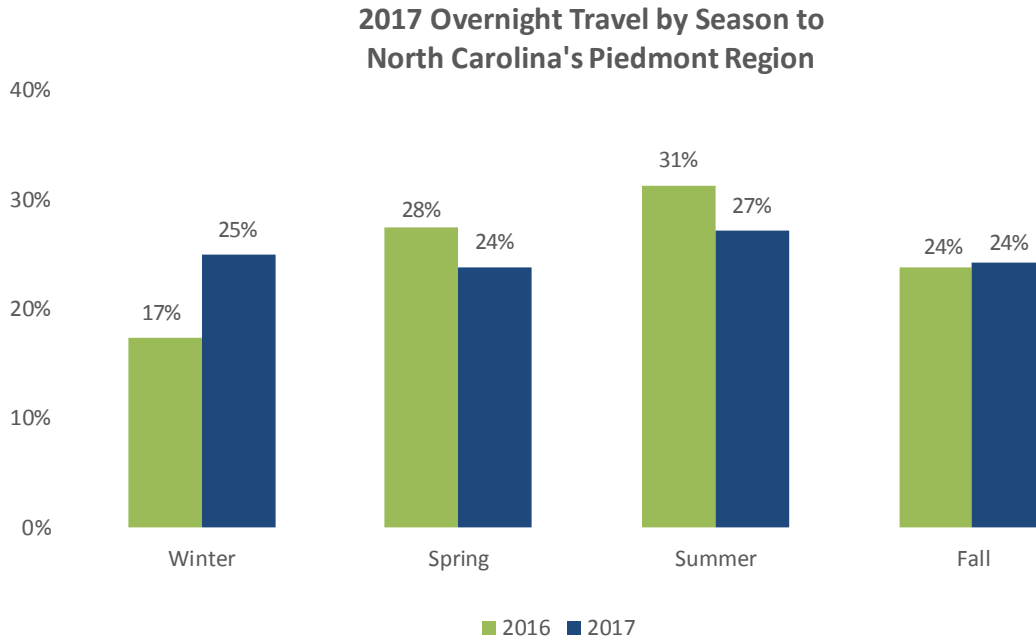


Frequent, repeat visitors to North Carolina comprised the largest proportion of Piedmont Region visitors. Twelve percent of the region’s out-of-state visitors were first time visitors in 2017.



Travel Volume by Season

The Piedmont Region typically sees more consistent visitation throughout the year than the other two regions. While 2016 saw the summer season increase in proportion of visitors and winter decrease, 2017 seasonal visitation was more consistent throughout the year than in 2016.



Average Length of Stay

In 2017, an average of 3.3 nights was spent by visitors to North Carolina's Piedmont Region. This was a slight decrease from the 2016 average length of stay of 3.6 nights. Data indicates that out-of-state visitors stay an average of 3.8 nights, while in-state visitors stay an average of 2.5 nights.

Travel Party Size

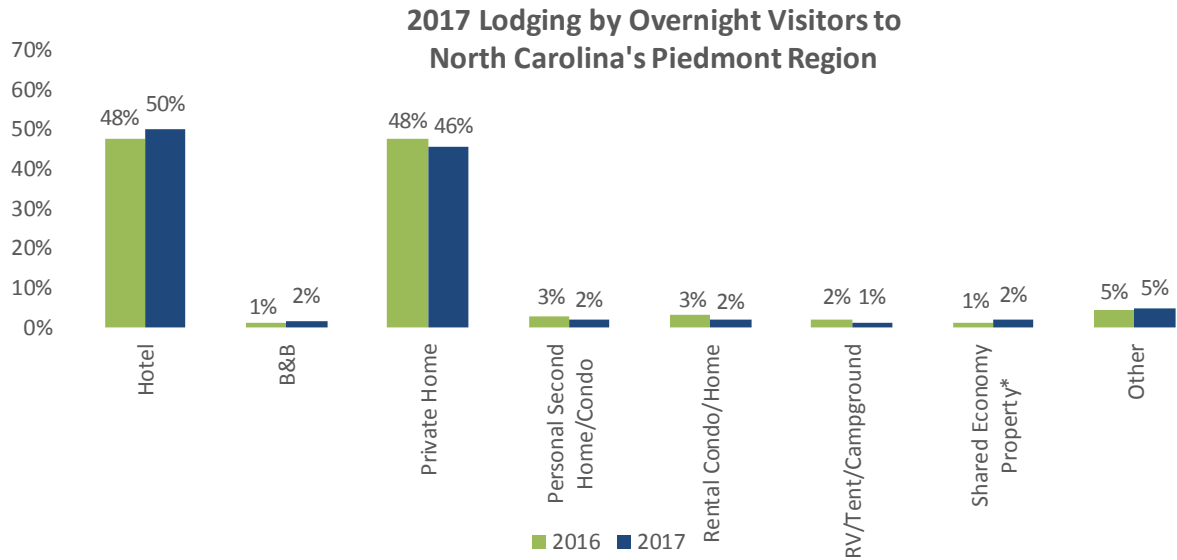
The average travel party size for all Piedmont Region overnight visitors was 2 people.

Children on Trip

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

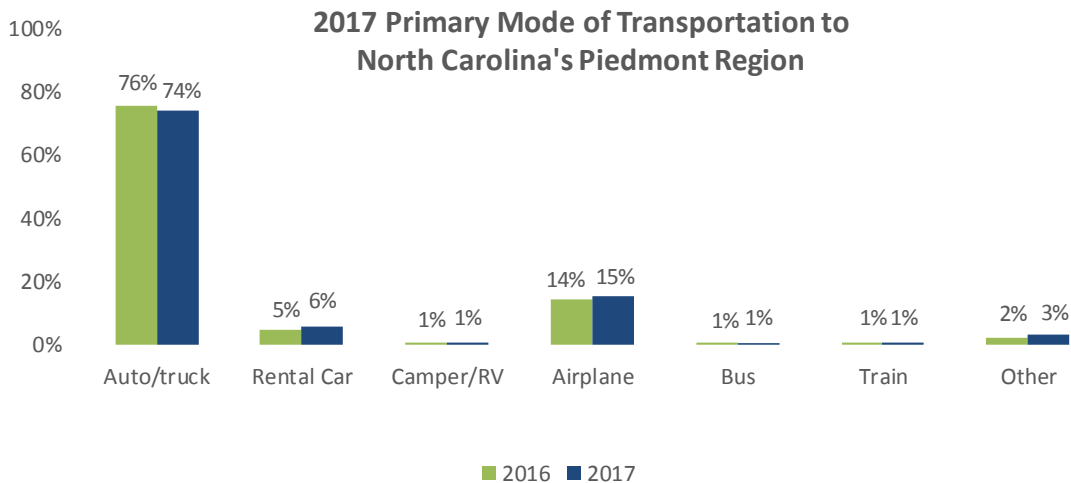
Lodging Used in Piedmont Region

In 2017, half of Piedmont Region visitors stayed in a hotel/motel, and nearly half (46%) of visitors stayed in a private home. A new category was added to the survey in 2016, and the results reflected that in 2017 approximately two percent of Piedmont Region visitors chose to use some type of shared economy lodging, such as AirBnB or VRBO. It should be noted that some visitors use more than one type of accommodation during a visit, so totals equal more than 100%.



Mode of Transportation

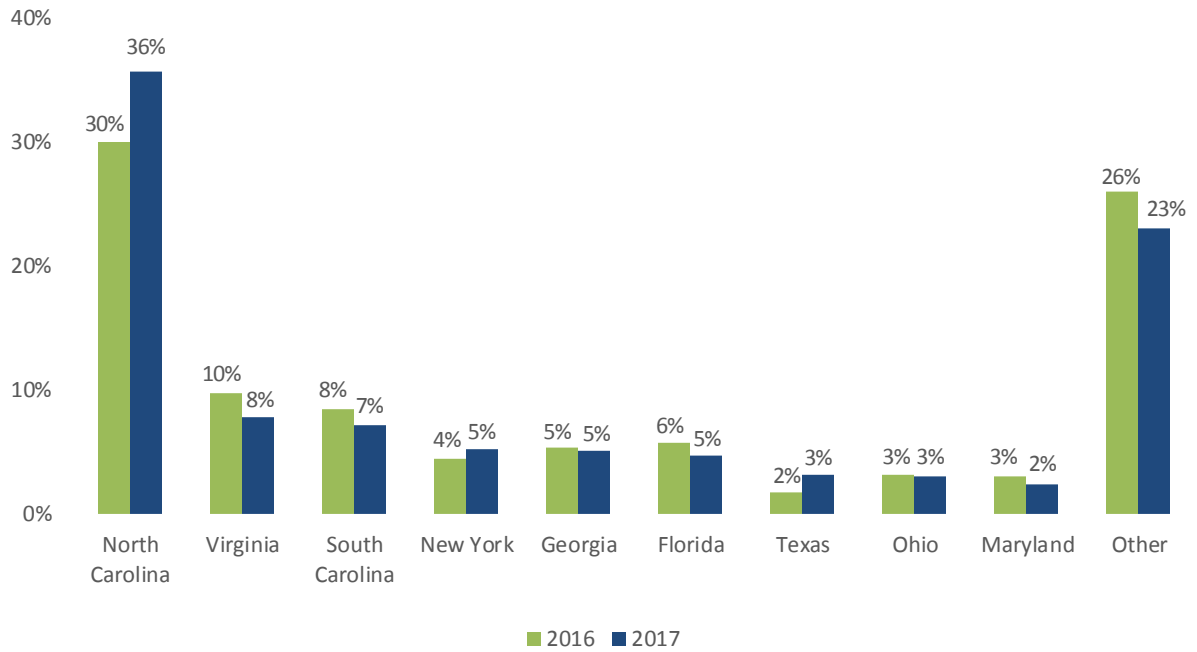
In 2017, personal auto was most used form of transportation (74%) to the Piedmont Region, however fifteen percent traveled by air.



Origin of Visitors

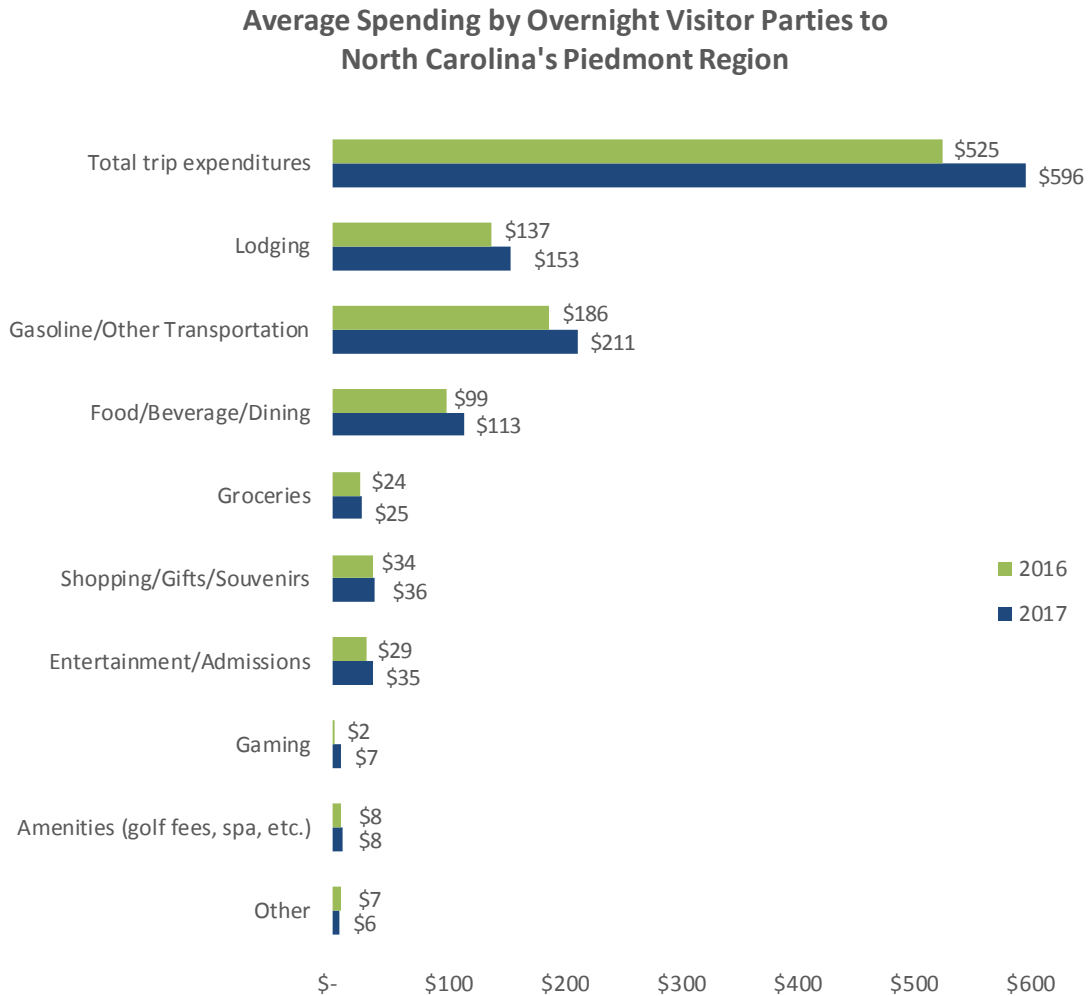
In 2017, the top states of origin for Piedmont Region overnight visitors included North Carolina (36%), Virginia (8%), South Carolina (7%), New York (5%), Georgia (5%) and Florida (5%). The proportion of visitors to the Piedmont from in-state, New York and Texas increased from 2016 to 2017.

2017 Top States of Origin of Overnight Visitors to North Carolina's Piedmont Region



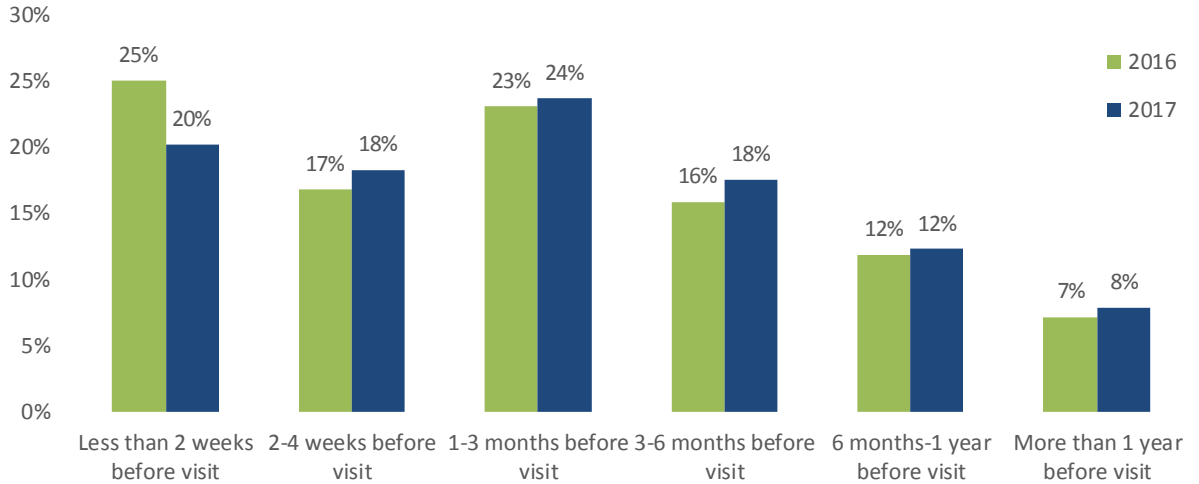
Amount Spent in Piedmont Region

The average overnight visitor party spending in the Piedmont Region was \$596, up fourteen percent from 2016. Spending in the lodging, transportation and dining categories all increased in 2017.



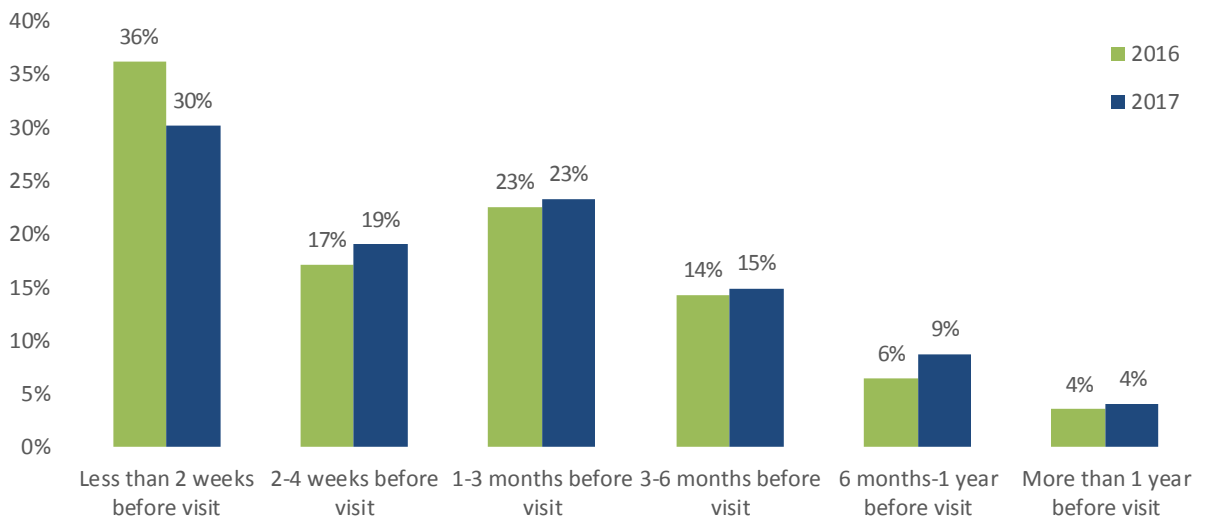
Travel Planning to Piedmont Region

2017 Length of Time to *Consider* NC as Travel Destination



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

2017 Length of Time to *Decide On* NC as Travel Destination



Activities

The following chart provides activities participated in by Piedmont Region visitors in 2017. These are not indicative of purpose of trip, but activities participated in while in the North Carolina. Over one-third (36%) of the overnight visitors to the piedmont visited with relatives while in the region. Twenty-four percent shopped and eighteen percent visited friends. Other popular activities included fine dining (12%), rural sightseeing (11%), museums (10%) and urban sightseeing (8%).

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

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

Activity	2017	2016
Visiting relatives	36.3%	37.2%
Shopping	24.0%	25.1%
Visiting friends	18.2%	20.9%
Fine dining	12.2%	12.3%
Rural sightseeing	11.2%	8.5%
Museums	9.5%	7.0%
Urban sightseeing	8.1%	9.0%
Historic sites/churches	8.0%	7.4%
Craft Breweries	6.6%	4.4%
State park/Monument/Recreation area	6.4%	7.4%
Musical performance/show	4.6%	2.9%
Gardens	4.5%	3.3%
Nightclub/dancing	4.2%	5.0%
Old homes/mansions	4.1%	4.9%
Youth/Amateur/Collegiate/Sporting Event <u>Spectator</u>	3.8%	2.9%
Local/folk arts/crafts	3.7%	3.9%
Art galleries	3.5%	2.7%
Hiking/Backpacking/Canyoneering	3.4%	4.3%
National park/Monument/Recreation area	3.4%	1.9%
Wine tasting/winery tour	3.3%	4.5%
Special events/Festivals	3.2%	3.1%
Fishing	3.1%	3.3%
Zoos/Aquariums Aviaries	3.0%	2.1%
Theme park/Amusement park/Water park	3.0%	1.9%
Wildlife viewing	2.8%	4.7%
Golf	2.6%	2.5%
Sport Events-Major/Professional	2.4%	0.8%
Casino/gaming	2.0%	0.6%
Spa/health club	1.9%	2.3%
Motor sports	1.8%	1.7%
Other nature (photography, rockhounding, etc.)	1.7%	4.1%
Theater/drama	1.7%	3.2%
Nature travel/ecotouring	1.7%	2.0%
Musical Theater	1.7%	0.3%

Demographic Profile of North Carolina Overnight Visitors to the Piedmont Region

Nearly two-thirds of the Piedmont Region’s overnight visitors (62.7%) of the visitors are married and twenty-seven percent have never married. Eleven percent of the region’s visitors are divorced, widowed or separated.

The largest proportion of North Carolina Piedmont Region overnight visitors classify themselves as white (82.5%), and nearly eleven percent classify themselves as black/African American.

The average Piedmont Region visitor is 44 years old and more than two-thirds (70.5%) of regional overnight visitor parties have a household head with a college degree or higher.

The average household income of a visitor party to the Piedmont Region in 2017 was \$88,990. More than half (53.6%) of the visitor parties that traveled to North Carolina’s Piedmont Region in 2017 had a household income \$75,000 or over. Twenty-one percent had a household income of over \$125,000.

More than two-thirds (67.5%) of overnight visitor parties reported that the head of household is employed, while eighteen percent are retired. The remainder reported “not employed” as work status.

The average household size of a North Carolina Piedmont Region overnight visitor party in 2017 was 2.7.

2017 Top Advertising Markets

In 2017, the top advertising markets sending overnight visitors to **North Carolina's Piedmont Region** were Raleigh-Durham-Fayetteville (11.6%), Charlotte (10.0%), Greensboro-High Point-Winston Salem (5.4%), Atlanta (4.2%), New York, NY (4.2%), Greenville-New Bern-Washington (3.8%) and Greenville-Spartanburg-Asheville (3.6%). Advertising markets correspond with Nielsen's Designated Market Areas (DMAs).

Top Advertising Markets of Origin for Overnight Piedmont Region Visitors

<i>DMA of Origin</i>	<i>2017 % of Piedmont Visitors</i>	<i>2016 % of Piedmont Visitors</i>	<i>2017 Piedmont Share of Total NC Visitors from DMA</i>	<i>2016 Piedmont Share of Total NC Visitors from DMA</i>
Raleigh-Durham (Fayetteville)	11.6%	8.4%	41.7%	37.6%
Charlotte	10.0%	8.3%	42.5%	51.9%
Greensboro-High Point-Winston Salem	5.4%	3.9%	37.2%	28.9%
Atlanta	4.2%	2.9%	32.9%	23.2%
New York, NY	4.2%	5.3%	64.3%	58.1%
Greenville-New Bern-Washington	3.8%	4.9%	64.1%	39.8%
Greenville-Spartanburg-Asheville	3.6%	7.3%	40.4%	52.1%
Washington DC Metro	3.0%	5.6%	37.0%	46.3%
Norfolk-Portsmouth-Newport News	2.8%	3.1%	34.6%	42.9%
Richmond-Petersburg	2.7%	1.8%	58.6%	32.4%
Philadelphia	2.6%	4.0%	51.5%	67.5%
Wilmington	2.0%	1.2%	37.1%	47.1%
Cleveland-Akron	1.7%	1.3%	73.3%	57.1%
Baltimore	1.6%	1.2%	47.6%	50.0%
Myrtle Beach-Florence	1.5%	1.2%	52.6%	42.1%
Columbia	1.5%	2.3%	38.5%	53.3%
Miami-Ft. Lauderdale	1.4%	1.2%	45.0%	40.0%
Chicago	1.4%	1.0%	81.8%	66.7%
Nashville	1.4%	0.6%	52.9%	33.3%
Roanoke-Lynchburg	1.2%	1.0%	61.5%	50.0%

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

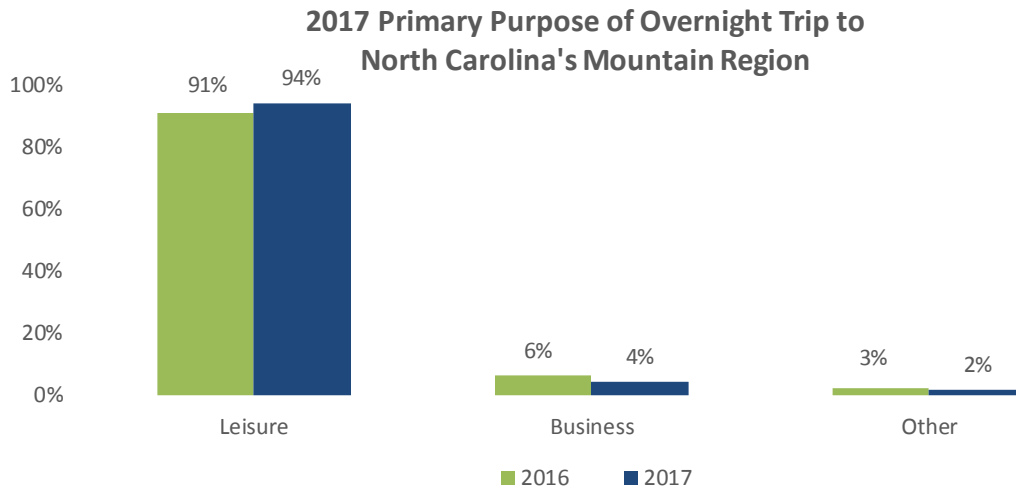
2017 Domestic Mountain Region Travel Summary

- ◆ In 2017, 29 percent of North Carolina visitors traveled to North Carolina’s Mountain Region, approximately 13.3 million person-trips (approximately 11 million overnight person-trips). For marketing purposes, the Mountain Region is made up of the 23 western-most counties of North Carolina. *Note that the regional volume totals do not sum to the statewide volume total, as some visitors travel to multiple geographic regions in one visit.
- ◆ Ninety-two percent of all domestic visitors (94 percent of overnight visitors), came to the Mountain Region for pleasure purposes, while nearly six percent of all visitors (4 percent of overnight visitors) came to conduct business (includes meeting/convention).
- ◆ Travel to the mountains of North Carolina was heaviest in the spring and summer. The summer (June – August) had the highest proportion of visitors, with twenty-nine percent of all 2017 mountain visitors. The spring (March - May) followed with twenty-eight percent of visitors, followed by fall (September - November) with twenty-two percent. The winter season welcomed twenty-one percent of all mountain visitors.
- ◆ Overnight visitors to the Mountain Region spent an average of 3.4 nights in the region.
- ◆ Fifty-three percent of Mountain Region visitors lodged in a hotel/motel, while twenty-six percent stayed at a private home. Five percent stayed in a rental home, while three percent stayed personal second home/condo and four percent in an RV/tent/campground. Six percent of visitors to the region reported staying in a shared economy property in 2017.
- ◆ The average party size for all Mountain Region visitors was 2.1 people. Twenty-five percent of all travel parties to the region included children in the party (27 percent of overnight parties).
- ◆ Ninety-three percent of *overnight* travelers to the Mountain Region drove (includes personal automobile, rental vehicle, RV/camper), while six percent traveled by air.
- ◆ In 2017, the average trip expenditure in the Mountain Region was \$724. The average trip expenditure for overnight visitors to the Mountain Region was \$789. Daytrip parties to the Mountain Region spent approximately \$518 per visit.
- ◆ The top states of origin of *overnight* visitors to the Mountain Region were North Carolina (44%), Florida (9%), Georgia (8%), South Carolina (8%), Tennessee (5%), and Virginia (3%).
- ◆ Fifty-one percent of the households (54 percent of overnight) that traveled to North Carolina’s Mountain Region in 2017 had a household income over \$75,000.
- ◆ In 2017, Charlotte (19.3%), was the top DMA of origin for *overnight* travelers to the Mountain Region, followed by Raleigh/Durham/Fayetteville (10.4%), Atlanta (9.0%), Greensboro-High Point-Winston Salem (7.3%) and Greenville/Spartanburg/Anderson SC/Asheville (3.8%).

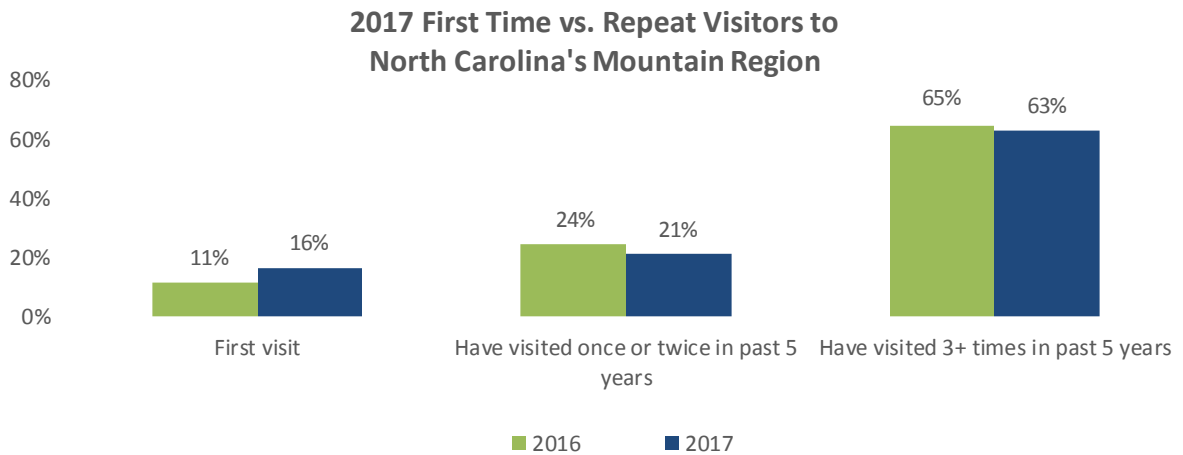
Mountain Region Overnight Visitor Profile

Main Purpose of Visit

In 2017, ninety-four percent of domestic overnight visitors came to the Mountain Region for leisure purposes, which included visiting friends and relatives, outdoor recreation and entertainment/sightseeing. Four percent of domestic overnight visitors came for general business, convention, seminar or other group meeting, down from six percent in 2016.

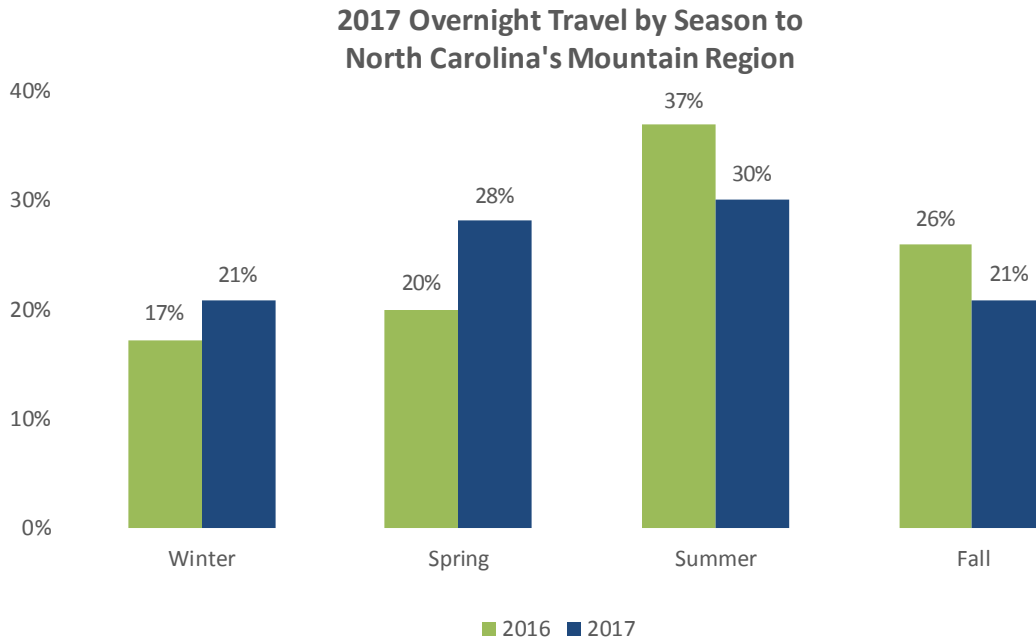


The proportion of visitors to North Carolina’s Mountain Region who were first time visitors was sixteen percent in 2017, up from eleven percent in 2016, though the majority of overnight visitors (63%) have visited more than three times in the past five years.



Travel Volume by Season

When examining visitation based on the typical seasonal schedule, the summer season (June through August) was the most popular in terms of proportion of overnight visitors to the Mountain Region in 2017 with thirty percent, down from thirty-seven percent in 2016. The spring season (March through May) followed with twenty-eight percent. Fall (September through November) and winter (December through February) welcomed twenty-one percent of visitors each.



Average Length of Stay

In 2017, an average of 3.4 nights was spent by visitors to North Carolina’s Mountain Region, up slightly from 3.2 nights in 2016. Data indicates that out-of-state visitors stay an average of 4.0 nights, while in-state visitors stay an average of 2.5 nights.

Travel Party Size

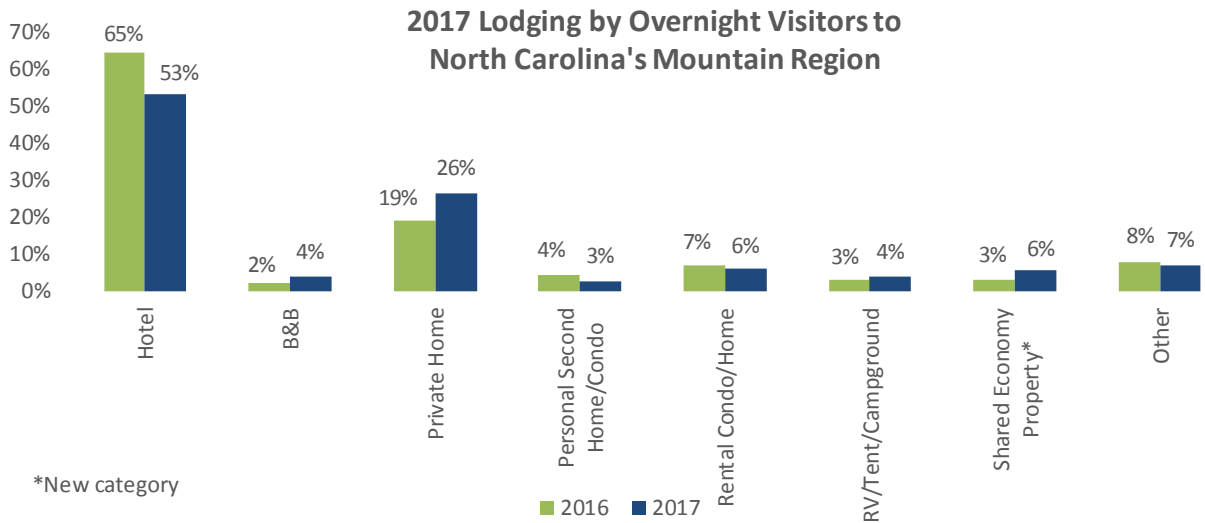
The average travel party size for Mountain Region overnight visitors was 2.1 people, down slightly from 2.3 in 2016.

Children on Trip

Twenty-seven percent of overnight visitor parties to the Mountain Region included children. Among those who traveled with children, the average number of children on trips was 1.6.

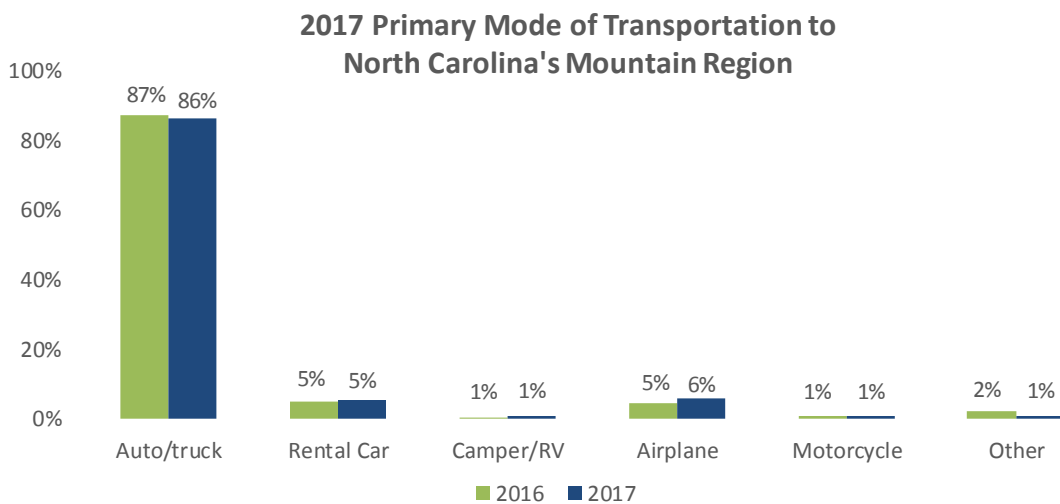
Lodging Used in Mountain Region

In 2017, more than half of Mountain Region visitors stayed in a hotel/motel, twenty-six percent lodged in a private home, four percent stayed in a bed and breakfast and six percent stayed in a rental home/condo. A new category was added to the survey in 2016, and the results reflected that approximately six percent of Mountain Region visitors chose to use some type of shared economy lodging, such as AirBnB or VRBO. It should be noted that some visitors use more than one type of accommodation during a visit, so totals equal more than 100%.



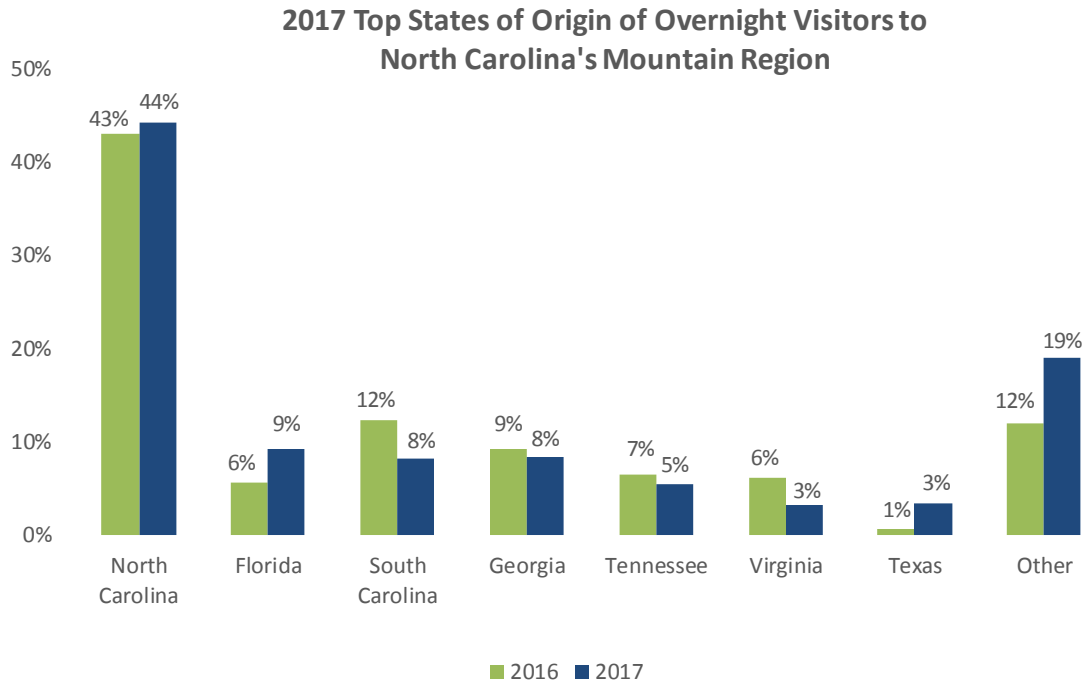
Mode of Transportation

In 2017, the personal auto was by far the dominant form of transportation (86%) for overnight visitors to the Mountain Region, while six percent traveled by air.



Origin of Visitors

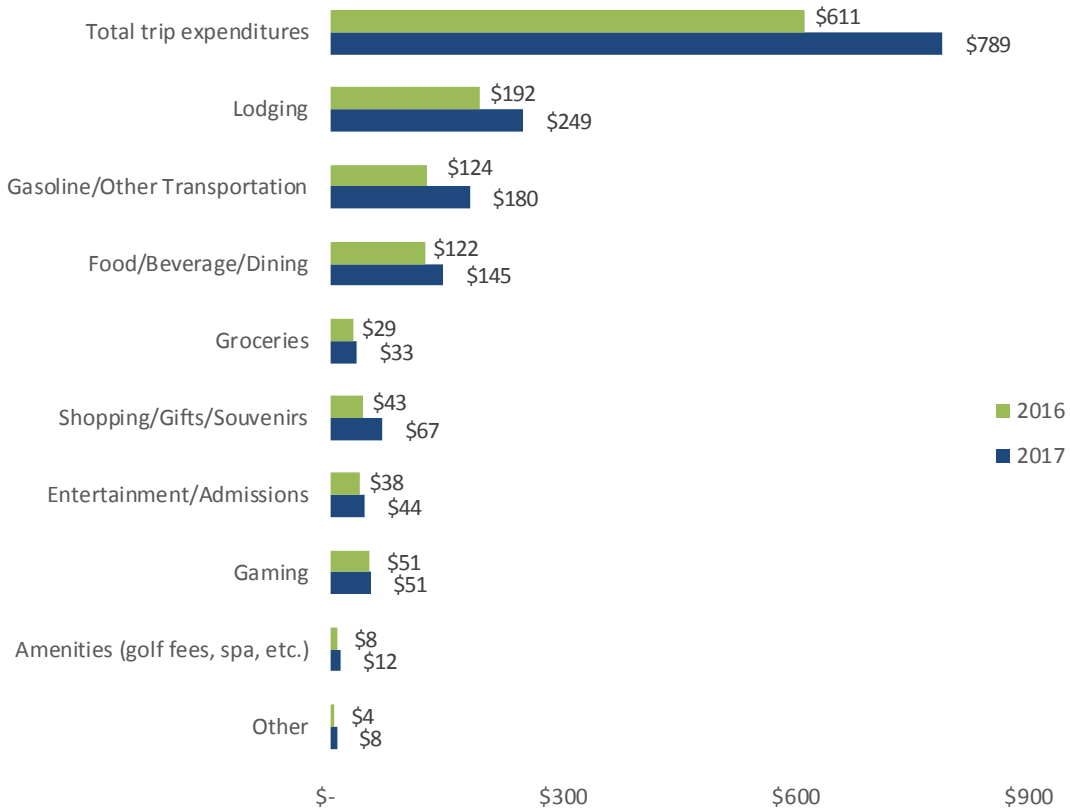
In 2017, the top states of origin for Mountain Region overnight visitors included North Carolina (44%), Florida (9%), South Carolina (8%), Georgia (8%), Tennessee (5%), Virginia (3%) and Texas (3%). The proportion of visitors from Florida increased from 6 percent in 2016 to 9 percent in 2017.



Amount Spent in Mountain Region

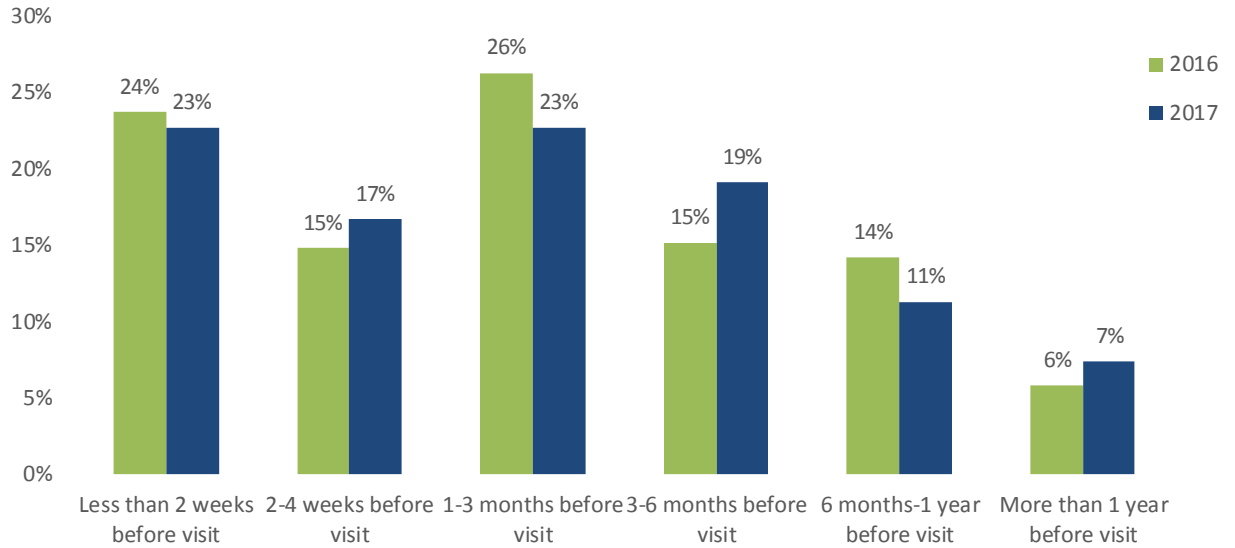
The average overnight visitor party spending in the Mountain Region was \$789, up twenty-nine percent from 2016. Nearly all spending categories increased from 2016 to 2017. While the Mountain Region volume was down slightly in 2017 (-1.3%), length of stay in the region was up slightly from 2016 to 2017.

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



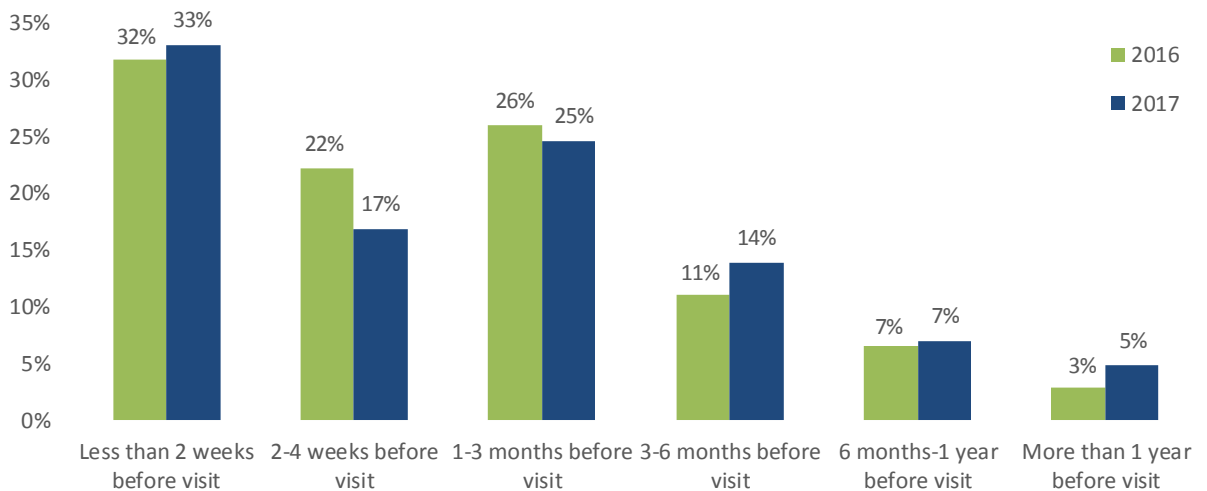
Travel Planning to Mountain Region

2017 Length of Time to *Consider* NC as Travel Destination



Forty percent of Mountain Region visitors considered the state one month or less ahead of travel, and nearly nineteen percent considered the visit more than six months prior to travel. Visitors to the region made the decision on the travel destination within a slightly longer time frame in 2017 than 2016. However, half of the visitors still made the decision one month or less ahead of travel.

2017 Length of Time to *Decide On* NC as Travel Destination



Activities

The following table provides activities participated in by Mountain Region visitors in 2017. These are not indicative of purpose of trip, but what activities visitors participate in while in North Carolina. Many of the activities participated in by mountain visitors increased from 2016 to 2017. ****Note that responses to this question are not mutually exclusive and percentages do not equal 100%. Therefore, proportions should not be aggregated to combine categories of activities. Also note that these activities do not imply purpose of trip.***

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

Activity	2017	2016
Shopping	32.3%	34.1%
Rural sightseeing	26.2%	20.2%
Visiting relatives	21.3%	18.2%
Hiking/Backpacking/Canyoneering	19.7%	15.2%
Historic sites/churches	19.4%	17.6%
State park/Monument/Recreation area	19.0%	10.8%
Fine dining	16.6%	15.3%
Old homes/mansions	15.8%	11.8%
National park/Monument/Recreation area	14.4%	7.2%
Urban sightseeing	14.0%	11.3%
Visiting friends	12.9%	18.0%
Wildlife viewing	11.9%	11.8%
Craft Breweries	11.8%	11.6%
Casino/gaming	11.1%	13.2%
Wine tasting/winery tour	11.0%	11.1%
Gardens	8.7%	5.7%
Art galleries	8.3%	6.9%
Museums	8.1%	9.0%
Other nature (photography, rockhound, etc.)	7.4%	5.8%
Nature travel/ecotouring	6.9%	7.1%
Local/folk arts/crafts	6.1%	11.2%
Fishing	4.2%	2.6%
Theme Park/Amusement Park/Water Park	4.1%	2.2%
Whitewater rafting/kayaking/canoeing/paddleboarding	4.0%	2.8%
Rock/mountain climbing	3.7%	1.9%
Zoos/Aquariums/Aviaries	3.1%	2.4%
Caverns	2.9%	0.2%
Golf	2.8%	1.7%
Native American ruins	2.7%	5.9%
Nightclub/dancing	2.7%	2.4%
Bird Watching	2.5%	3.2%
Horseback Riding	2.2%	4.8%
Special Events/Festivals	2.0%	4.0%
Musical performance/show	1.9%	3.7%
Spa/Health Club	1.7%	1.2%
Mountain biking	1.6%	1.7%

2017 Demographic Profile of North Carolina Overnight Visitors to the Mountain Region

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

The largest proportion of North Carolina Mountain Region overnight visitors classify themselves as white (91%), and two percent classify themselves as black/African American. Four percent reported that they are Asian/Pacific Islander.

The average Mountain Region visitor is 47 years old, and nearly three-fourths (71%) of Mountain Region overnight visitor parties have a household head with a college degree or higher.

The average household income of an overnight visitor party to the Mountain Region in 2017 was \$86,570. More than half (54%) of the overnight visitor parties that traveled to North Carolina's Mountain Region in 2017 had a household income \$75,000 or over. Sixteen percent had a household income of over \$125,000.

Two-thirds 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.

The average household size of a North Carolina Mountain Region overnight visitor party in 2017 was 2.5.

2017 Top Advertising Markets

In 2017, the top advertising markets sending overnight visitors to **North Carolina's Mountain Region** were Charlotte (19.3%), Raleigh/Durham (10.4%), Atlanta (9.0%), Greensboro-High Point-Winston Salem (7.3%), Greenville-Spartanburg-Asheville-Anderson (3.8%), and Miami-Ft. Lauderdale (3.4%). As compared to 2016, in terms of proportion of visitors, the region saw growth from the Charlotte, Miami, Columbia, St. Louis and Orlando markets. Advertising markets correspond with Nielsen's Designated Market Areas (DMAs).

Top Advertising Markets of Origin for Overnight Mountain Region Visitors

<i>DMA of Origin</i>	<i>2017 % of Total NC Visitors to Region</i>	<i>2016 % of Total NC Visitors to Region</i>	<i>2017 Mountain Share of NC Visitors from DMA</i>	<i>2016 Mountain Share of NC Visitors from DMA</i>
Charlotte	19.3%	11.0%	39.9%	31.5%
Raleigh-Durham (Fayetteville)	10.4%	10.5%	18.3%	22.1%
Atlanta	9.0%	13.9%	35.4%	52.4%
Greensboro-High Point-Winston Salem	7.3%	7.4%	24.5%	25.6%
Greenville-Spartanburg-Asheville-Anderson	3.8%	13.6%	21.1%	44.7%
Miami-Ft. Lauderdale	3.4%	1.5%	55.0%	25.0%
Columbia	2.9%	1.7%	34.6%	16.7%
St. Louis	2.1%	0.3%	53.8%	14.3%
Orlando-Daytona Beach-Melbourne	2.1%	1.0%	36.8%	20.0%
Tri-Cities, TN-VA	1.9%	0.6%	54.5%	10.5%
Washington, DC	1.8%	2.6%	11.1%	10.0%
Chattanooga	1.6%	1.2%	83.3%	15.4%
Myrtle Beach-Florence	1.6%	2.7%	26.3%	42.1%
Tampa-St. Petersburg	1.6%	1.1%	35.7%	16.7%
Knoxville	1.5%	1.5%	33.3%	41.7%
Nashville	1.5%	2.0%	29.4%	50.0%
Wilmington	1.4%	0.4%	14.3%	5.9%

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

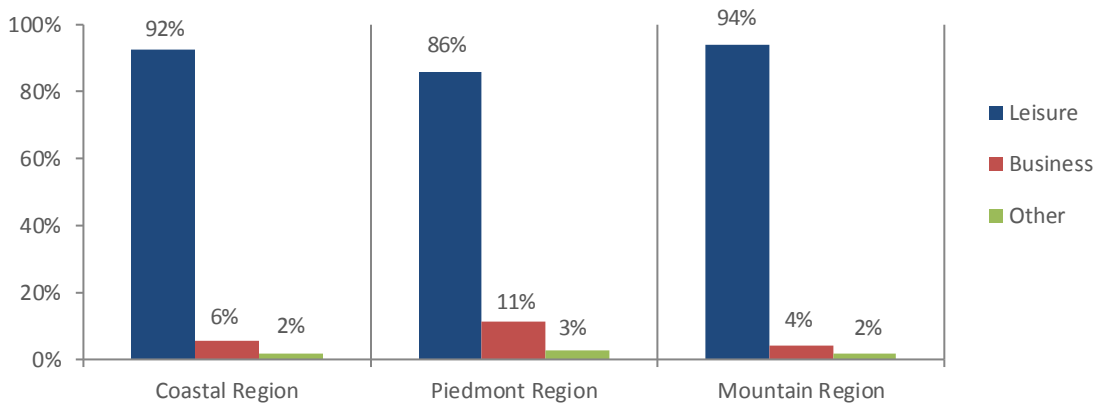
2017 Regional Comparison

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

Purpose of Trip

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

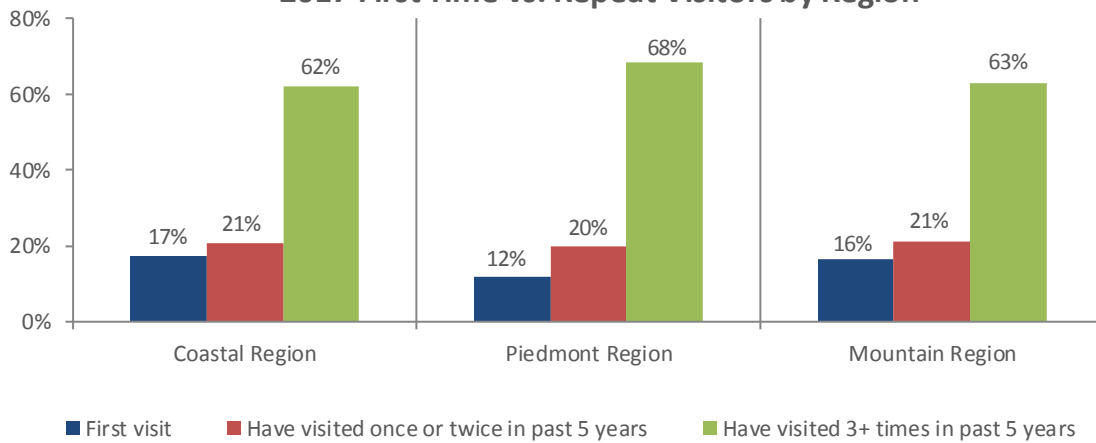
2017 Primary Purpose of Trip by Region



First Time vs. Repeat Visitors

The majority of each region's visitors are repeat visitors, though the Piedmont Region saw a slightly larger proportion of frequent, repeat visitors than the other two regions in 2017.

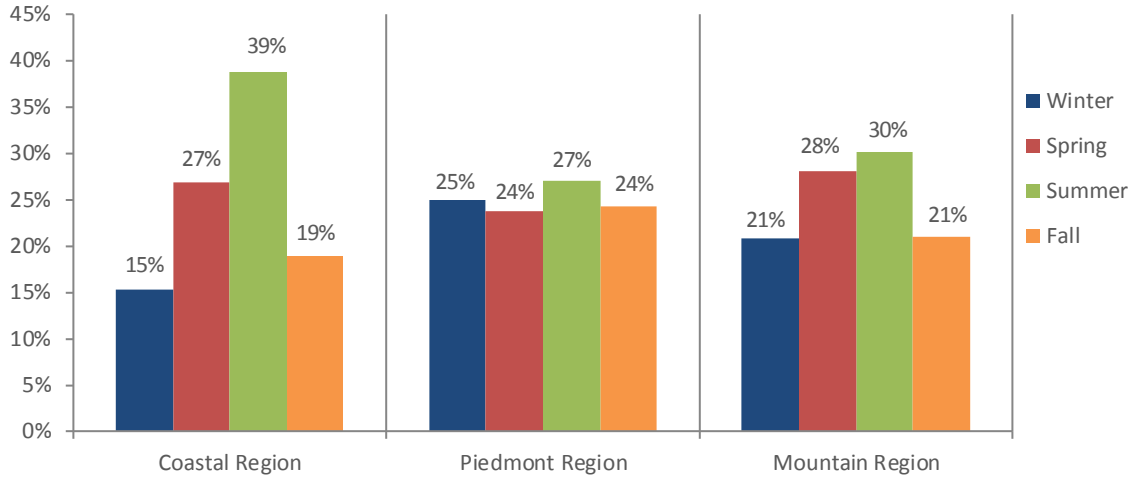
2017 First Time vs. Repeat Visitors by Region



Travel Volume by Season

The seasonal distribution of regional visitors helps understand the flow of travelers through the state. The Coastal Region sees a larger proportion of total visitors during the summer; while the mountain region had larger proportions of visitors during the spring and summer in 2017.

2017 Season of Travel by Region



Average Length of Stay for Overnight Visitors

Coastal Region All Overnight	Piedmont Region All Overnight	Mountain Region All Overnight
4.2 nights	3.3 nights	3.4 nights
Coastal Region Out-of-State	Piedmont Region Out-of-State	Mountain Region Out-of-State
5.0 nights	3.8 nights	4.0 nights
Coastal Region Resident	Piedmont Region Resident	Mountain Region Resident
3.1 nights	2.5 nights	2.5 nights

Travel Party Size for Overnight Visitors

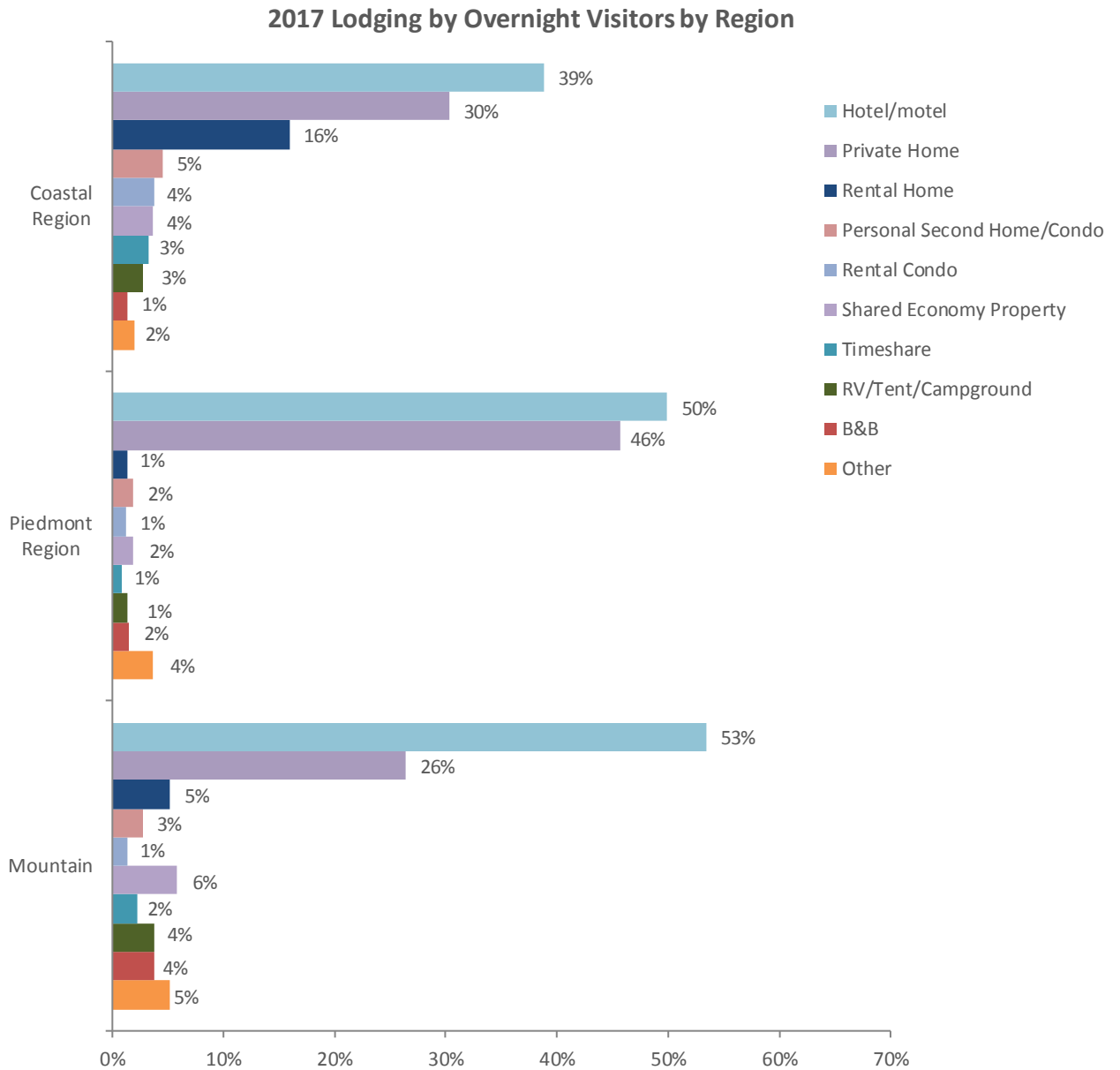
Coastal Region	Piedmont Region	Mountain Region
2.3 people	2.0 people	2.1 people
Coastal Region Out-of-State	Piedmont Region Out-of-State	Mountain Region Out-of-State
2.3 people	2.0 people	2.1 people
Coastal Region Resident	Piedmont Region Resident	Mountain Region Resident
2.3 people	2.1 people	2.2 people

Children on Trip for Overnight Visitors

Coastal Region	Piedmont Region	Mountain Region
34.1%	25.7%	26.7%
Coastal Region Out-of-State	Piedmont Region Out-of-State	Mountain Region Out-of-State
32.7%	24.6%	19.3%
Coastal Region Resident	Piedmont Region Resident	Mountain Region Resident
34.8%	27.7%	36.2%

Lodging Type

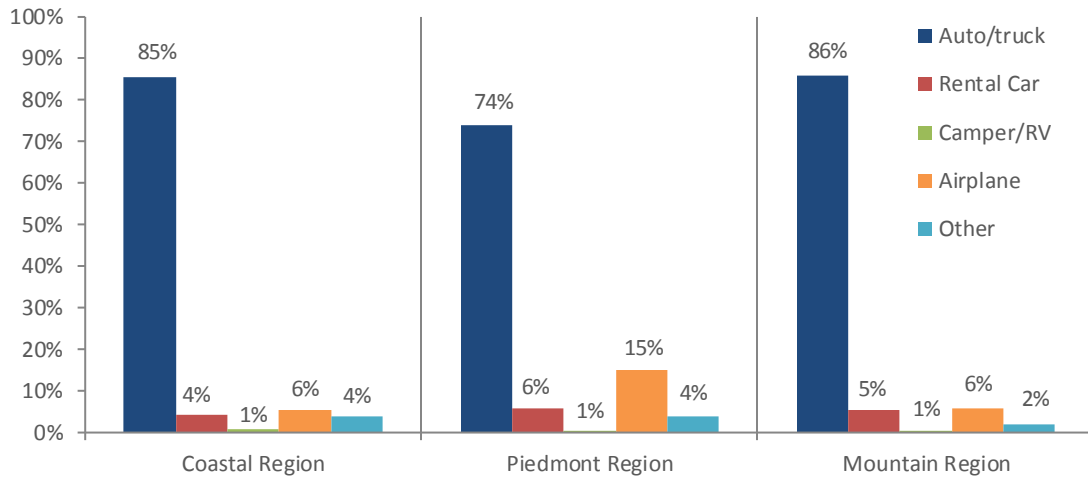
Hotels/motels and private homes are the most popular forms of lodging throughout the state, though the proportions vary by region. Mountain Region visitors use hotels/motels the most (53%), and while more than one-third of Coastal Region visitors also stay in hotels/motels, many stay in private and rental homes as well.



Mode of Transportation

Not surprisingly, auto transportation was the primary method of transportation for North Carolina overnight visitors. The Piedmont Region, with the most and largest airports, saw the most overnight travelers using air transportation (15%).

2017 Primary Transportation by Overnight Visitors by Region



Origin of Overnight Visitors

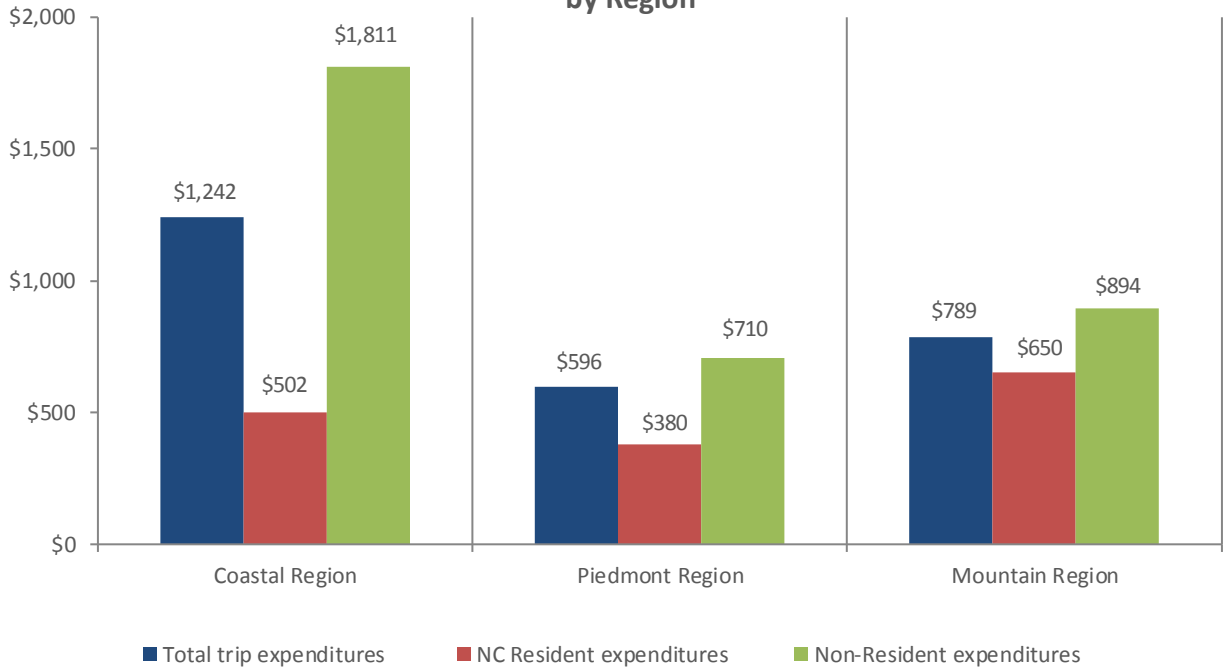
North Carolina is the top state of origin for all three regions of the state. In-state residents comprise more than one-third of the state’s overnight visitors, and in each of the regions. The other top market states are similar, though there are some differences in rank between regions.

Coastal Region	Piedmont Region	Mountain Region
North Carolina (43.2%)	North Carolina (35.6%)	North Carolina (44.3%)
Virginia (15.1%)	Virginia (7.8%)	Florida (9.2%)
New York (5.8%)	South Carolina (7.1%)	Georgia (8.4%)
Ohio (4.2%)	New York (5.2%)	South Carolina (8.2%)
Maryland (3.8%)	Georgia (5.1%)	Tennessee (5.4%)
Pennsylvania (3.8%)	Florida (4.7%)	Texas (3.4%)
Florida (2.6%)	Texas (3.1%)	Virginia (3.2%)
Michigan (2.3%)	Ohio (3.0%)	Missouri (2.0%)
New Jersey (2.1%)	New Jersey (2.7%)	Ohio (1.7%)
South Carolina (1.9%)	Pennsylvania (2.6%)	Kentucky (1.6%)
Tennessee (1.5%)	Maryland (2.4%)	Maryland (1.5%)

Trip Expenditures

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

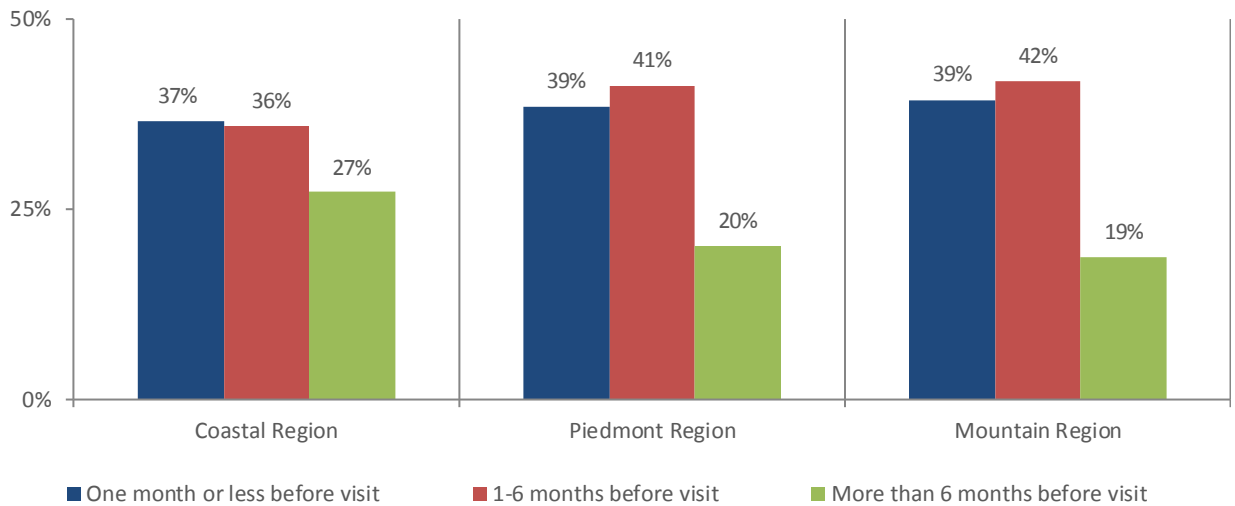
2017 Average Trip Spending by Overnight Visitor Parties by Region



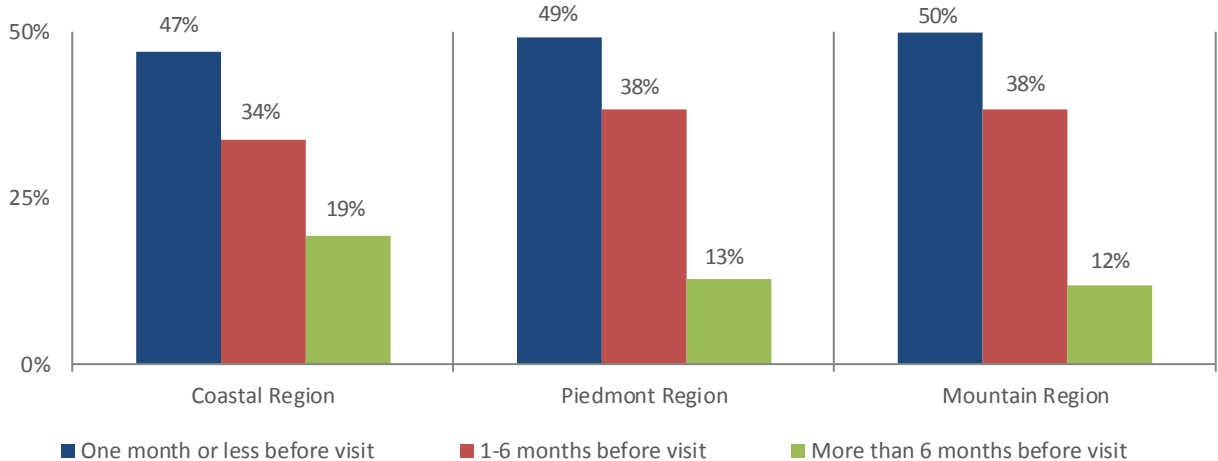
Trip Planning

Visitors to the Coastal Region of North Carolina considered and planned travel to the state farther in advance than did visitors to the Mountain or Piedmont regions. More than one-fourth of visitors who eventually traveled overnight to the Coastal Region began considering the trip more than six months prior to the visit, and nearly twenty percent made the decision to visit more than six months in advance.

How Far in Advance Overnight Trip to North Carolina was *Considered*



How Far in Advance Overnight Trip to North Carolina was *Decided*



Activities

Activities participated in by North Carolina overnight travelers in 2017 vary somewhat by region, but common activities between regions include visiting friends and relatives, shopping and sightseeing. Mountain region visitors tend to participate in more activities per trip than other regions. **Note that responses to this question are not mutually exclusive and percentages do not equal 100%. Therefore, proportions should not be aggregated to combine categories of activities. Also note that these activities do not imply purpose of trip.*

Coastal Region	Piedmont Region	Mountain Region
Beach	Visiting relatives	Shopping
Shopping	Shopping	Rural sightseeing
Visiting relatives	Visiting friends	Visiting relatives
Historic sites/churches	Fine dining	Hiking/ Backpacking/ Canyoneering
Rural sightseeing	Rural sightseeing	Historic sites/churches
Museums	Museums	State park/Monuments/Recreation areas
State park/Monuments/Recreation areas	Urban sightseeing	Fine dining
Fine dining	Historic sites/churches	Old homes/mansions
Visiting friends	Beach	National park/Monuments/Recreation areas
Wildlife viewing	Craft breweries	Urban sightseeing
Fishing	State park/Monuments/ Recreation areas	Visiting friends
Urban sightseeing	Musical performance/show	Wildlife viewing
National park/Monuments/Recreation areas	Gardens	Craft breweries
Zoos/ Aquariums/ Aviaries	Nightclub/dancing	Casino/gaming
Craft breweries	Old homes/mansions	Wine tasting/winery tour
Nature travel/ecotouring	Sports events - Youth/ Amateur/Collegiate/Other (spectator)	Gardens
Nightclub/dancing	Local/folk arts/crafts	Art galleries
Golf	Art galleries	Museums
Biking/Road biking/Cycling	Hiking/ Backpacking/ Canyoneering)	Other nature (photography, rockhound, etc)
Wine tasting/winery tour	National park/Monuments/Recreation areas	Nature travel/ecotouring
Local/folk arts/crafts	Wine tasting/winery tour	Local/folk arts/crafts
Whitewater rafting/Kayaking/Canoeing Paddleboarding	Special events/Festivals	Fishing
Old homes/mansions	Fishing	Theme park/Amusement park/Water park
Other nature (photography, rockhound, etc)	Zoos/ Aquariums/ Aviaries	Whitewater rafting/Kayaking/Canoeing/ Paddleboarding
Bird watching	Theme park/Amusement park/Water park	Rock/mountain climbing
Motor boat/Jet ski	Wildlife viewing	Zoos/ Aquariums/ Aviaries
Gardens	Golf	Caverns

2017 Demographic Profile for Overnight Visitor Parties

	Coastal Region	Piedmont Region	Mountain Region
Average age of household head	46 years of age	44 years of age	47 years of age
Education of Household Head			
High school or less	14.6%	10.4%	11.4%
Some college - no degree	21.0%	19.2%	17.6%
Completed college	45.9%	48.4%	49.4%
Post Graduate College	18.5%	22.0%	21.6%
Employment of Household Head			
Employed	63.4%	67.5%	65.5%
Retired	20.8%	17.8%	22.2%
Not employed	15.8%	14.7%	12.3%
Annual Household Income			
Less than \$30,000	10.9%	10.9%	11.4%
\$30,000-\$49,999	12.2%	13.6%	13.0%
\$50,000-\$74,999	22.4%	21.9%	21.6%
\$75,000 & over	54.5%	53.6%	54.0%
Marital Status			
Married	66.4%	62.7%	63.7%
Never married	19.8%	26.6%	23.3%
Divorced, widowed, separated	13.8%	10.7%	13.0%
Ethnicity			
White	92.5%	82.5%	91.4%
Black/African American	4.0%	10.8%	1.9%
American Indian, Aleut Eskimo	0.7%	1.1%	0.6%
Asian or Pacific Islander	1.2%	4.0%	4.3%
Other	1.6%	1.6%	1.8%
Average Household Size	2.9 persons	2.7 persons	2.5 persons

2017 Top Advertising Markets

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

Coastal Region
Raleigh-Durham-Fayetteville (17.9%)
Norfolk-Portsmouth-Newport News (7.3%)
Greensboro-High Point-Winston Salem (7.1%)
Washington DC Metro (6.4%)
Charlotte (6.0%)
Wilmington (4.9%)
Greenville-New Bern-Washington (4.3%)
Philadelphia (4.2%)
Richmond-Petersburg (3.8%)
New York (2.8%)
Piedmont Region
Raleigh-Durham-Fayetteville (11.6%)
Charlotte (10.0%)
Greensboro-High Point-Winston Salem (5.4%)
Atlanta, GA (4.2%)
New York (4.2%)
Greenville-New Bern-Washington (3.8%)
Greenville-Spartanburg-Asheville (3.6%)
Washington, DC (3.0%)
Norfolk-Portsmouth-Newport News (2.8%)
Richmond-Petersburg (2.7%)
Mountain Region
Charlotte (19.3%)
Raleigh-Durham (Fayetteville) (10.4%)
Atlanta, GA (9.0%)
Greensboro-High Point-Winston Salem (7.3%)
Greenville-Spartanburg-Asheville (3.8%)
Miami-Ft. Lauderdale (3.4%)
Columbia (2.9%)
St. Louis (2.1%)
Orlando-Daytona Beach-Melbourne (2.1%)
Tri-Cities, TN-VA (1.9%)

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

2017 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.