

WAVE II - SEPTEMBER 2020

NORTH CAROLINA RESIDENT SENTIMENT

Impact of COVID-19





OVERVIEW

On behalf of Visit North Carolina, MMGY Global Travel Intelligence conducts an ongoing tracking study to monitor the impact of COVID-19 on North Carolina residents. Each report presents the most current data capturing changes in residents' attitudes toward travel and tourism in North Carolina as a result of COVID-19. The report includes data from Wave II of the study. Note that Wave II of this study was conducted prior to the 2020 presidential election or the surge in COVID-19 cases in the U.S.

Survey Methodology

- A random sample of 1,200 North Carolina residents as defined below participated in the second of three planned surveys measuring North Carolina residents' sentiment toward tourism in the wake of COVID-19. Respondents are screened as follows:
 1. 18 years of age or older;
 2. Confirmed residence in the Coastal, Mountain and Piedmont regions of the state
- To ensure proper sample representation, a random sample of 400 respondents were selected from each of the three regions. Data were re-balanced to represent the population of North Carolina.
- Data in this report were collected between September 11 and September 28, 2020.
- Difference scores are provided for all ratings. This is simply the bottom 2 box (1 and 2) subtracted from the top 2 box (4 and 5). This score, ranging from -100% (least) to 100% (most), is an indication of the degree to which the respondent agrees with a statement, intends to engage in an activity, etc. A score of zero (0%) represents a neutral response.
- The error interval of the statistical estimates appearing in this report (for n=1,200) is +/- 2.8% at the 95% level of confidence.



The North Carolina Resident

In the second wave of this study, while COVID-19 still grips the nation, North Carolina resident attitudes remains consistent. Although residents understand the importance of tourism to the state's economy, they are still hesitant to travel and hesitant to welcome visitors into their communities. It continues to be important for safety protocols, such as mandatory face masks and social distancing be in place in any destinations they consider visiting.

In the coming months, North Carolina's tourism economy is going to be supported by its own residents as most have become more interested in traveling within the state, particularly by taking road trips to open-air destinations such as North Carolina's coast and mountains. They may be willing to venture into South Carolina, but other nearby states are still low on the list, and any trip by air is still of little interest.

Few residents are aware of the Count On Me NC health safety campaign, but those who are find it very informative. Residents are still interested in seeing promotional information on destinations within North Carolina and would prefer to get this information through TV advertising or by digital or internet ads.



/ Key Findings

- / North Carolina residents are committed to wearing masks. Two-thirds of all residents state they wear face masks whenever they leave the house. In this second wave, residents continue to be unlikely to attend large events or visit large cities. While they are likely to visit outdoor areas of the state, they are unlikely to camp or stay in RV Parks or campgrounds.
- / Most North Carolinians find friends and family to be the most trustworthy source of COVID-19 safety information. Even local health departments are viewed as more trustworthy than CDC, which comes in third.
- / North Carolina residents view tourism as extremely important to the recovery of the North Carolina economy after COVID-19. Although they are anxious to travel, they are willing to be patient as they are still not yet willing to travel or to welcome visitors into the state.
- / When residents do start traveling, they expect the use of face masks to be the most essential safety protocol for residents when traveling after COVID-19. Social distancing is also very important, but it is clear that requiring face masks would go a long in encouraging North Carolinians to visit destinations and attractions.



/ Key Findings

- / If North Carolina residents do travel in the next three months, they will likely travel by car and stay within the state attending outdoor events and visiting the mountain and coastal regions.
- / When asked how COVID-19 has impacted interest in various types of air and auto travel, North Carolina residents' interest in taking trips to the mountains, beaches and rural destinations has increased, while interest in taking any type of air trips has decreased.
- / About one in four residents are more interested in taking overnight trips within North Carolina than they were before COVID-19. About 20% are also interested in venturing into South Carolina, but very few have interest in visiting any other nearby states.
- / Although there is interest in traveling within the state, most residents have not done so since March, 2020. And about 7 in 10 have no plans of taking an overnight trip within the state by December 31, 2020.



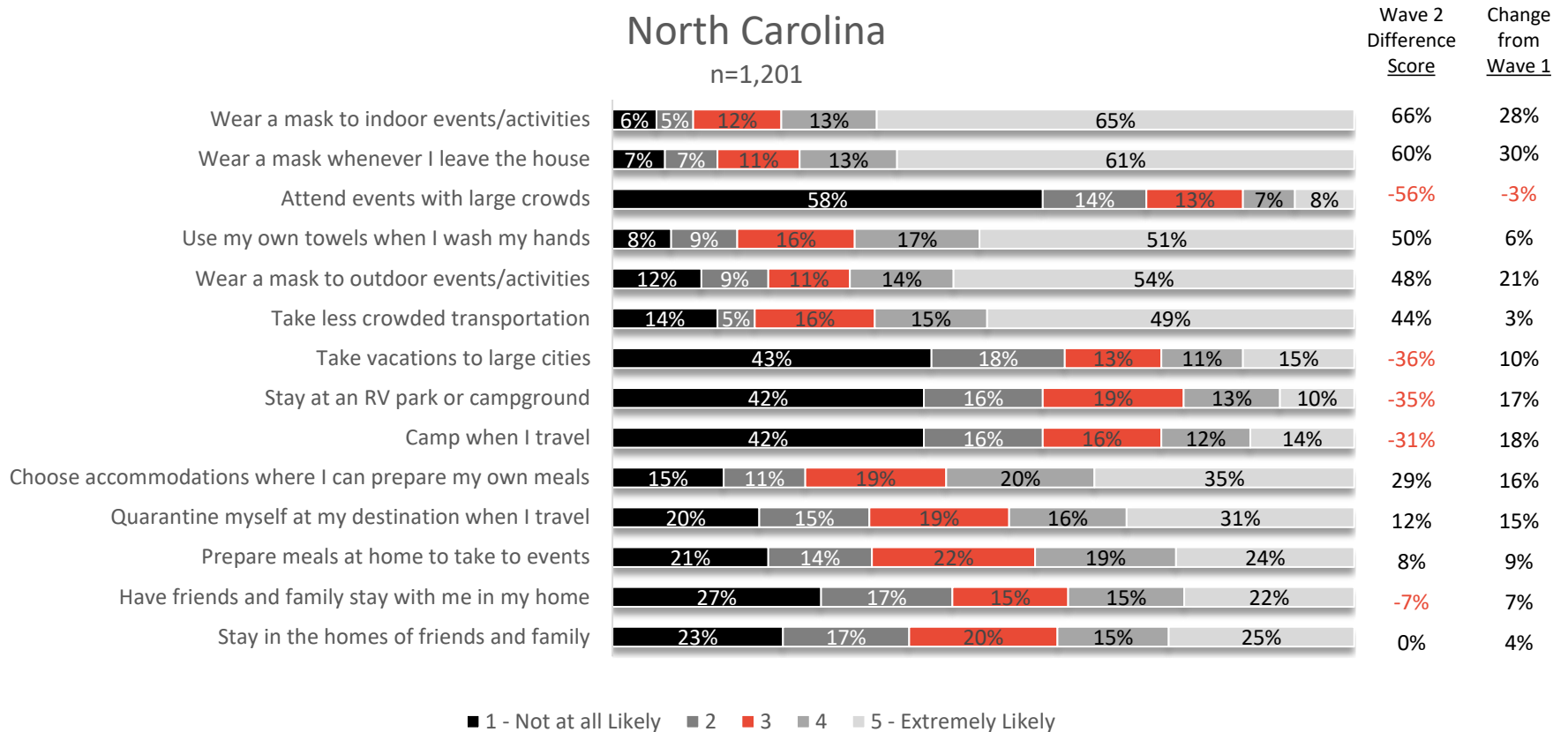
/ Key Findings

- / When asked about North Carolina's Count On Me NC health safety campaign, only 20% of residents had heard of the campaign. Those who had heard of the campaign most likely saw it in TV and heard it on the radio or saw it online.
- / Those who were aware of the Count On Me NC health safety campaign thought it was quite effective in providing assurance that health safety precautions are being implemented in North Carolina, that it provided information on health safety while traveling within North Carolina, that it provided advertising/visuals needed to recognize businesses providing health safety training to their employees as well as information useful in training their own employees on health safety protocols.
- / Residents feel that tourism has the most impact on the economic growth of North Carolina and its communities. They also feel that it has an impact on infrastructure, ambience, and the local ecology and environment.
- / North Carolina's residents are interested in seeing travel advertising for destination within the state. Their most preferred medium is TV followed by digital or internet advertising

COVID-19

North Carolina Residents Will Likely Avoid Large Cities and Large Crowds and Will Wear Masks When They do Go Out

North Carolina n=1,201



Q1: Using a scale of 1 (not at all likely) to 5 (extremely likely), as a result of your COVID-19 experience, please indicate how likely you are to do each of the following?

Youngest and Oldest Residents Most Likely to Take Health and Safety Precautions

North Carolina Difference Scores (%)

	18-34 n=207	35-54 n=308	55+ n=667
Wear a mask to indoor events/activities	61	60	74
Wear a mask whenever I leave the house	66	53	59
Attend events with large crowds	-49	-52	-44
Use my own towels when I wash my hands	64	42	47
Wear a mask to outdoor events/activities	35	38	65
Take less crowded transportation	51	45	41
Take vacations to large cities	-11	-26	-64
Stay at an RV park or campground	-17	-29	-52
Camp when I travel	6	-25	-63
Choose accommodations where I can prepare my own meals	50	26	14
Quarantine myself at my destination when I travel	29	1	8
Prepare meals at home to take to events	18	12	--
Have friends and family stay with me in my home	14	12	-4
Stay in the homes of friends and family	21	-8	-11

Q1: Using a scale of 1 (not at all likely) to 5 (extremely likely), as a result of your COVID-19 experience, please indicate how likely you are to do each of the following?

Newcomers to North Carolina are the Most Likely Wear Masks

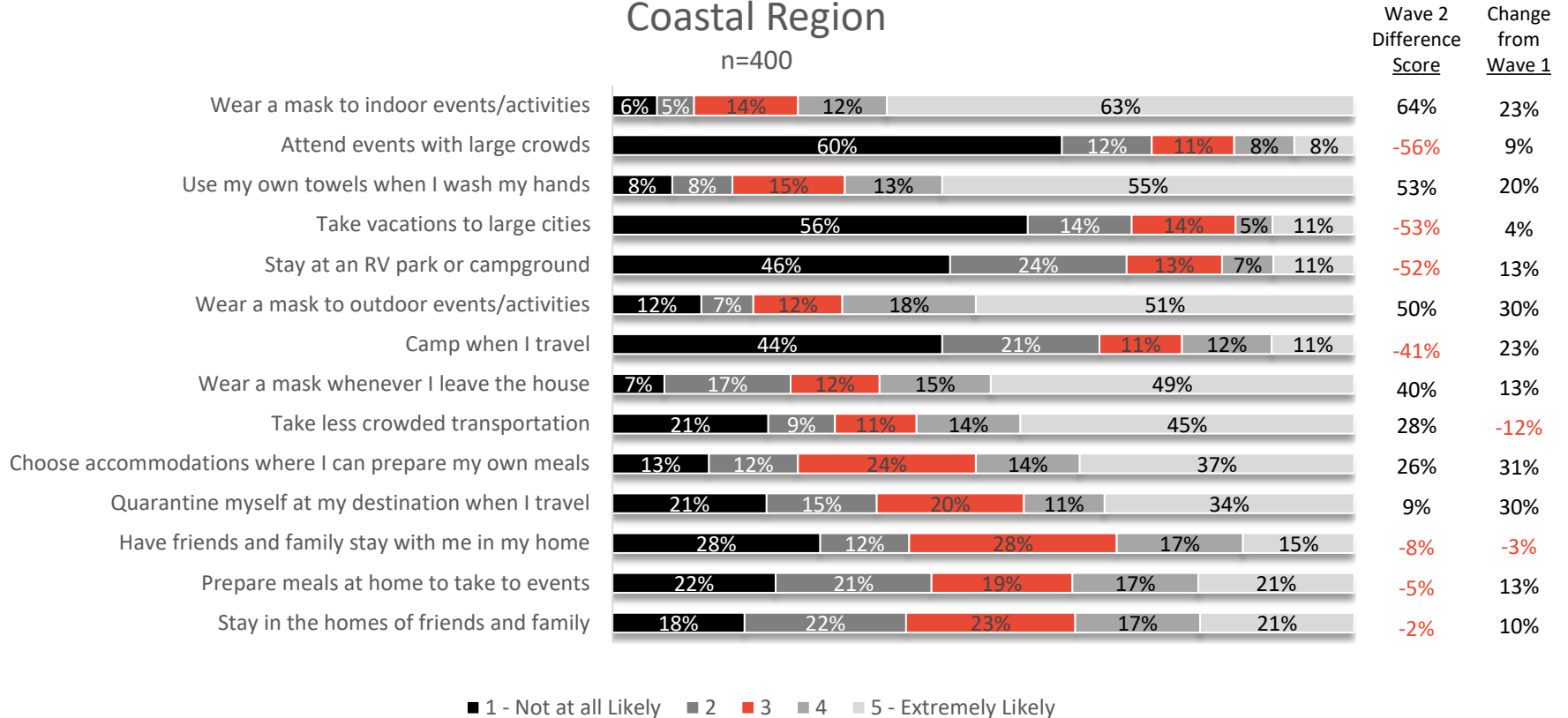
North Carolina Difference Scores (%)

	<5 Years n=171	5-10 Years n=160	11-20 Years n=209	20+ Years n=297	Born in NC n=364
Wear a mask to indoor events/activities	71	63	67	72	60
Wear a mask whenever I leave the house	53	69	72	54	57
Attend events with large crowds	-58	-64	-43	-58	-57
Use my own towels when I wash my hands	53	47	63	32	60
Wear a mask to outdoor events/activities	60	16	68	44	49
Take less crowded transportation	46	37	56	47	38
Take vacations to large cities	5	-19	-42	-33	-58
Stay at an RV park or campground	-5	-36	-39	-26	-52
Camp when I travel	2	-29	-27	-30	-47
Choose accommodations where I can prepare my own meals	34	29	37	30	22
Quarantine myself at my destination when I travel	28	14	34	--	6
Prepare meals at home to take to events	2	18	31	10	-4
Have friends and family stay with me in my home	8	21	-9	-12	-17
Stay in the homes of friends and family	8	36	--	14	-28

Q1: Using a scale of 1 (not at all likely) to 5 (extremely likely), as a result of your COVID-19 experience, please indicate how likely you are to do each of the following?

Activity Engagement as a Result of COVID-19

Coastal Region n=400

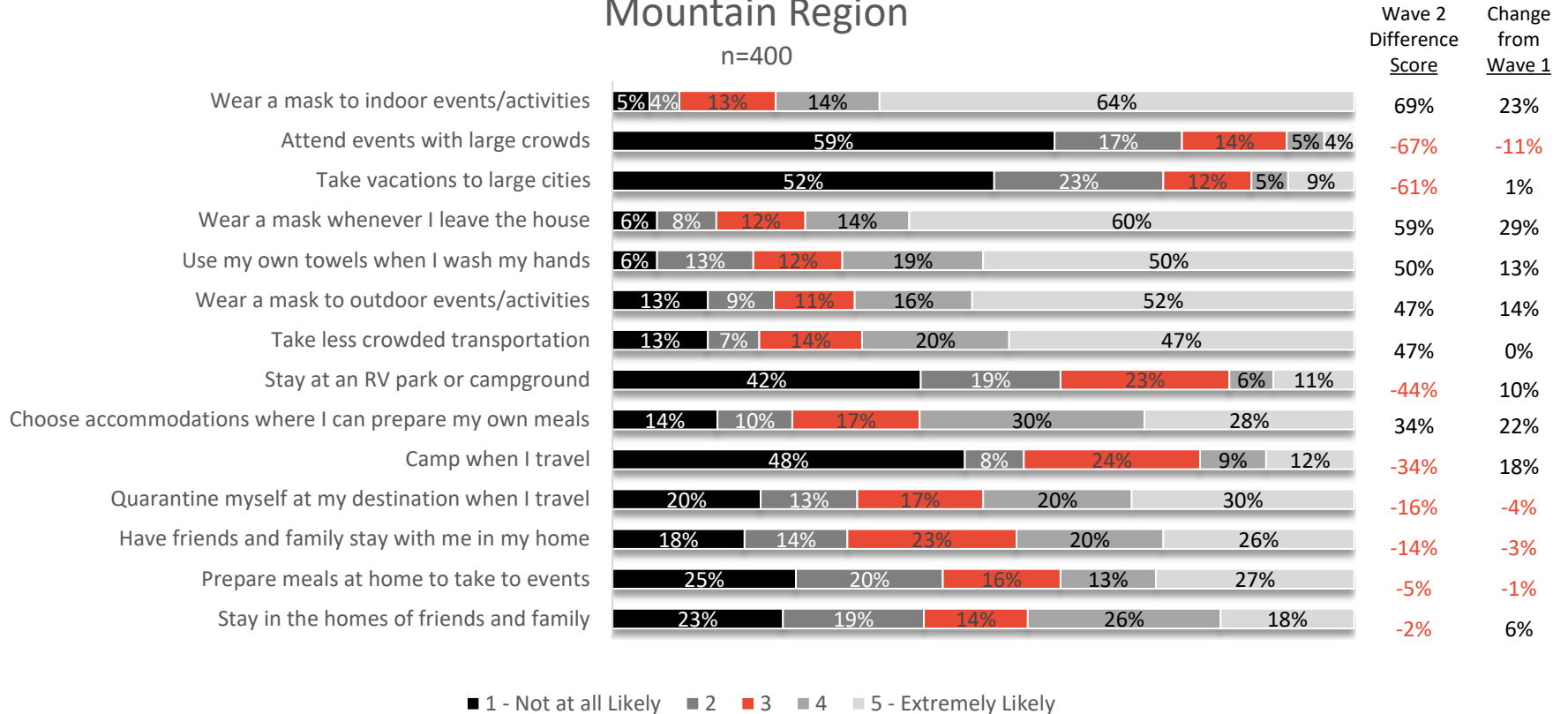


Q1: Using a scale of 1 (not at all likely) to 5 (extremely likely), as a result of your COVID-19 experience, please indicate how likely you are to do each of the following?

Activity Engagement as a Result of COVID-19

Mountain Region

n=400

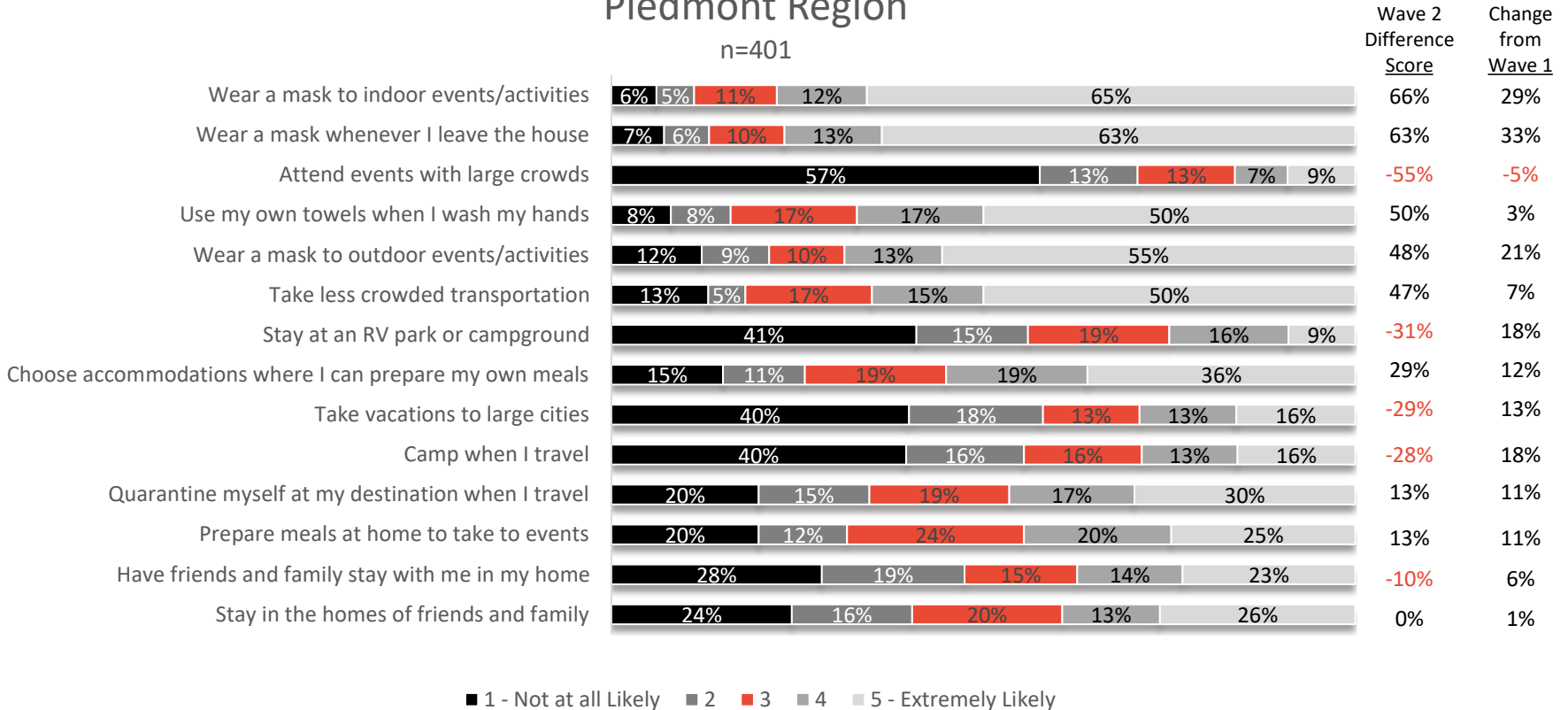


Q1: Using a scale of 1 (not at all likely) to 5 (extremely likely), as a result of your COVID-19 experience, please indicate how likely you are to do each of the following?

Activity Engagement as a Result of COVID-19

Piedmont Region

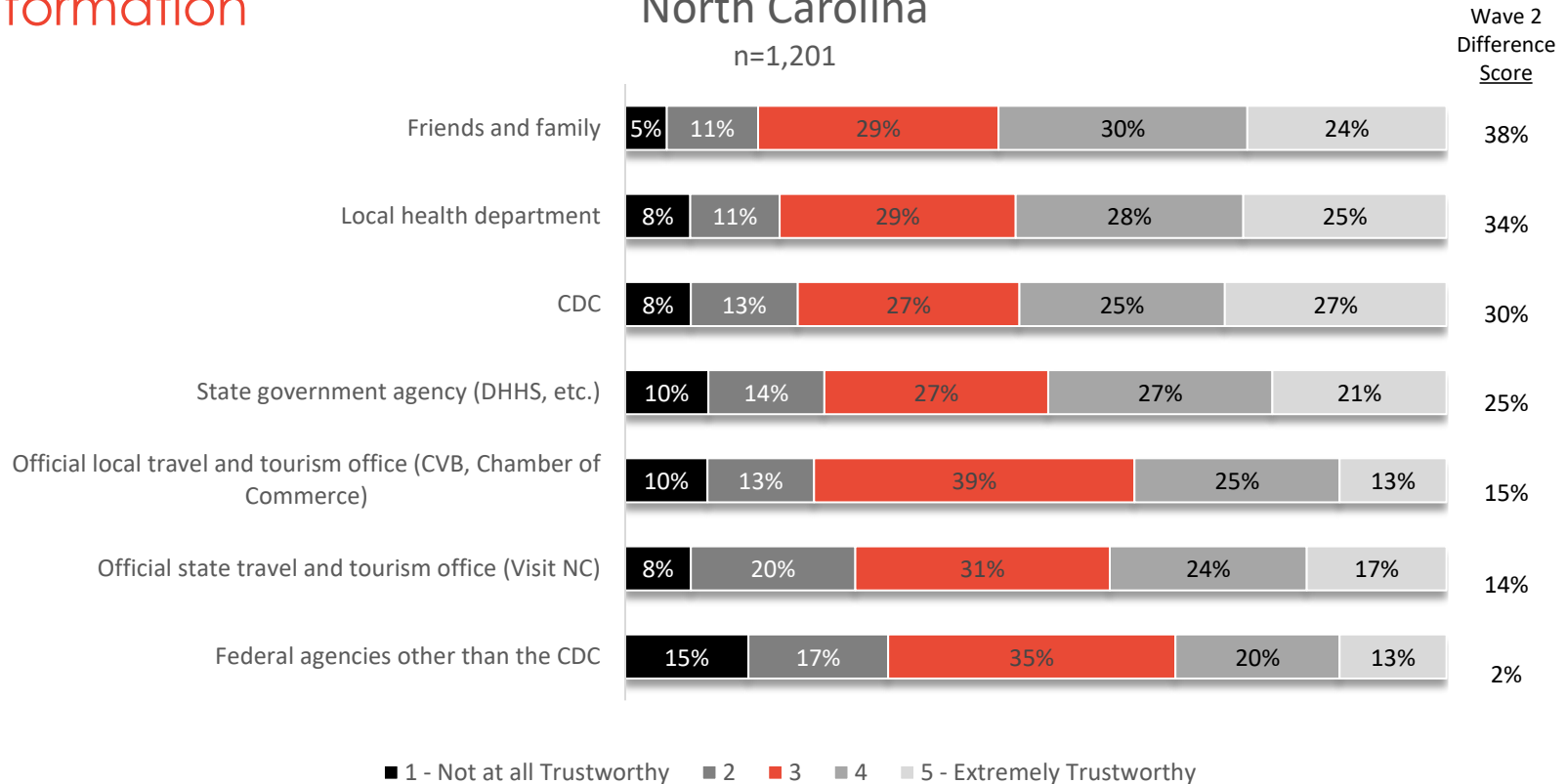
n=401



Q1: Using a scale of 1 (not at all likely) to 5 (extremely likely), as a result of your COVID-19 experience, please indicate how likely you are to do each of the following?

North Carolina Residents Find Friends/Family and the Local Health Department to be the Most Trustworthy for Providing Safety Information

North Carolina
n=1,201



Q1a: Using a scale of 1 (not at all trustworthy) to 5 (extremely trustworthy), when planning your travel, please rate how trustworthy you feel each of the following is for providing COVID-19 safety information. (Question added W2)

Youngest Residents Find Friends/Family Most Trustworthy for Providing Safety Information, While Older Residents Find the Local Health Department the Most Trustworthy

North Carolina Difference Scores (%)

	18-34 n=207	35-54 n=308	55+ n=667
Friends and family	47	31	36
Local health department	22	24	52
CDC	43	8	39
State government agency (DHHS, etc.)	3	26	39
Official local travel and tourism office (CVB, Chamber of Commerce)	23	5	17
Official state travel and tourism office (Visit NC)	8	7	24
Federal agencies other than the CDC	14	-10	1

Q1a: Using a scale of 1 (not at all trustworthy) to 5 (extremely trustworthy), when planning your travel, please rate how trustworthy you feel each of the following is for providing COVID-19 safety information. (Question added W2)

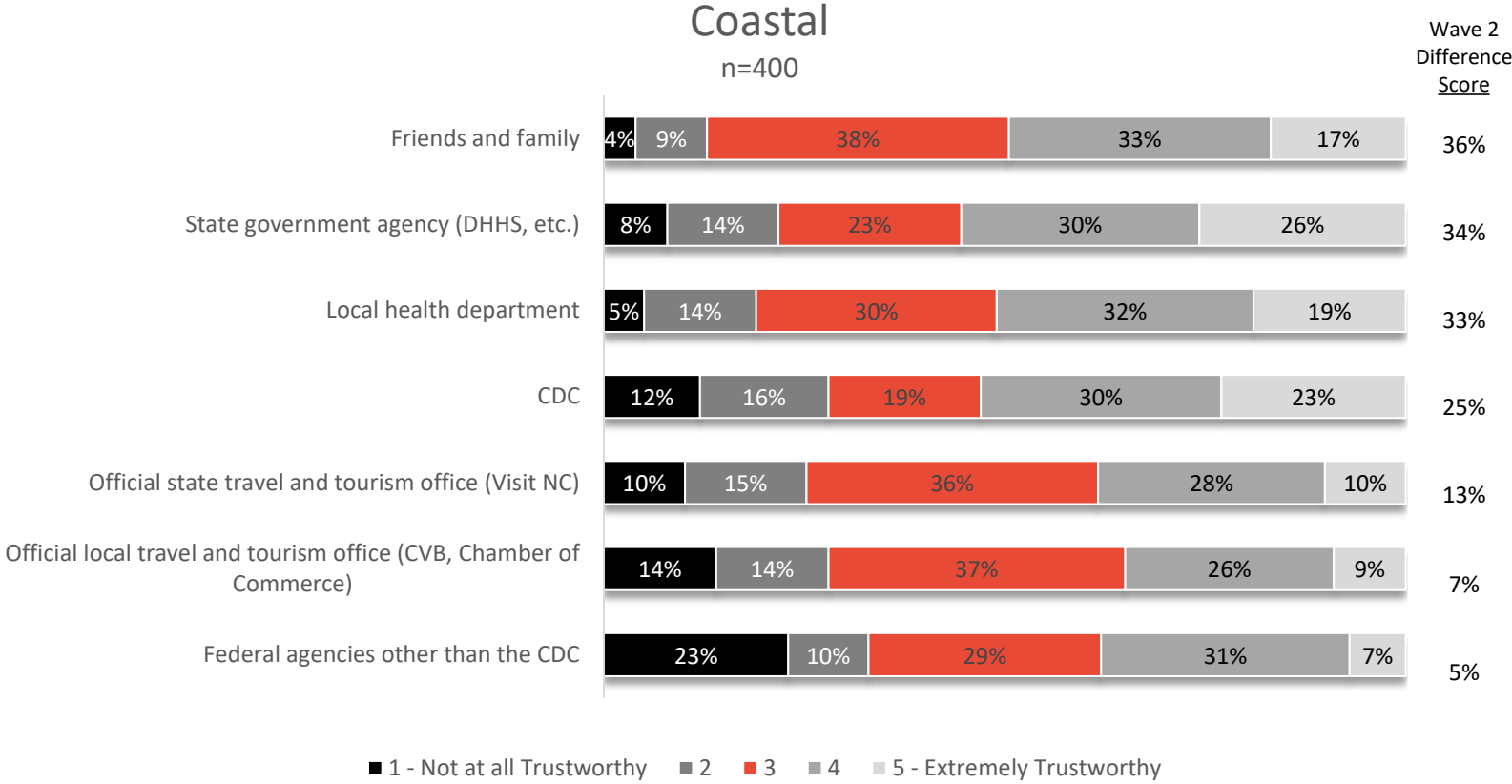
Newest Residents Find Friends/Family Most Trustworthy in Providing COVID-19 Safety Information

North Carolina Difference Scores (%)

	<5 Years n=171	5-10 Years n=160	11-20 Years n=209	20+ Years n=297	Born in NC n=364
Friends and family	51	40	36	25	43
Local health department	3	37	50	32	40
CDC	43	15	44	25	28
State government agency (DHHS, etc.)	-3	23	39	22	32
Official local travel and tourism office (CVB, Chamber of Commerce)	26	2	7	17	16
Official state travel and tourism office (Visit NC)	-24	13	25	20	19
Federal agencies other than the CDC	-9	14	29	-13	3

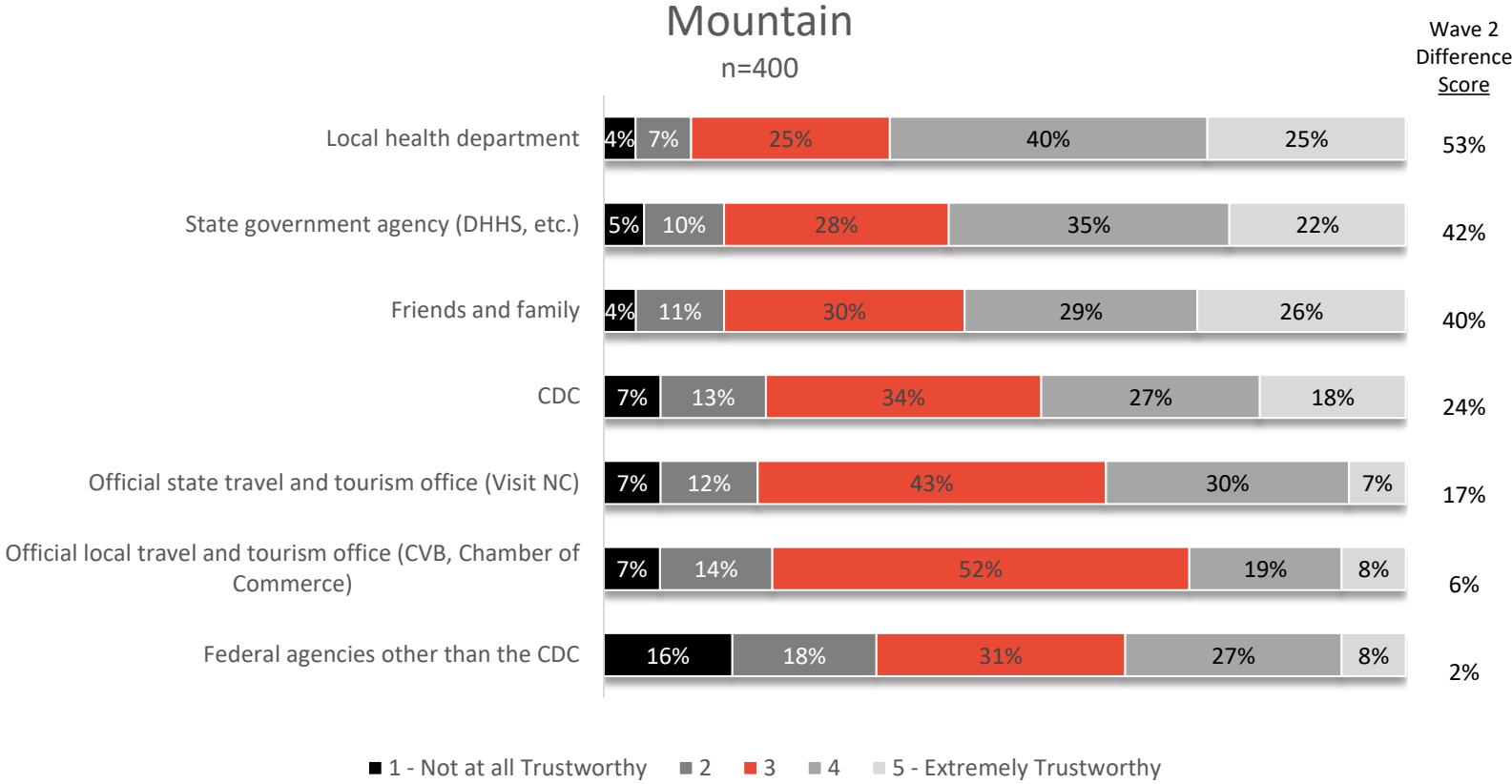
Q1a: Using a scale of 1 (not at all trustworthy) to 5 (extremely trustworthy), when planning your travel, please rate how trustworthy you feel each of the following is for providing COVID-19 safety information. (Question added W2)

Trustworthy Sources of Information



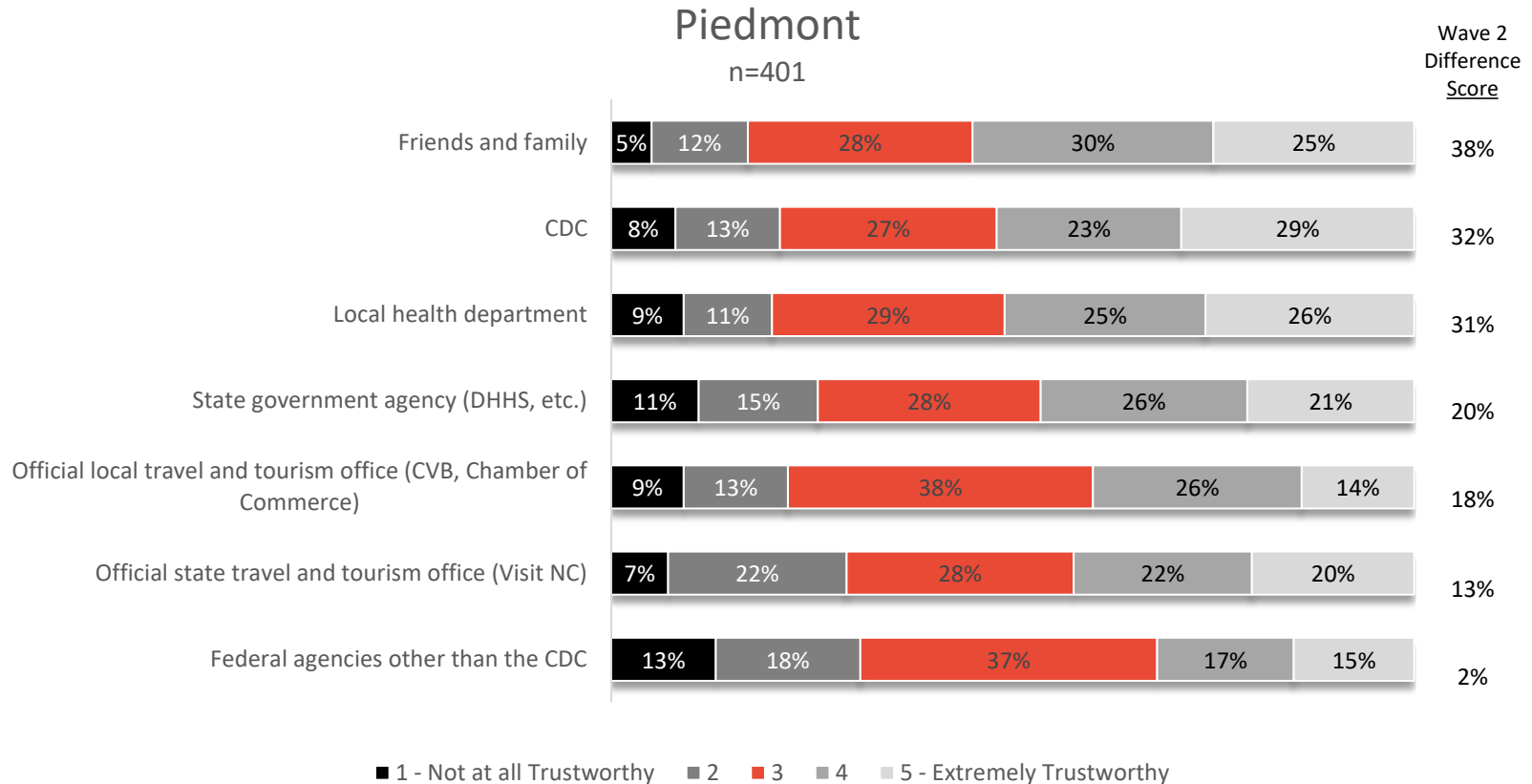
Q1a: Using a scale of 1 (not at all trustworthy) to 5 (extremely trustworthy), when planning your travel, please rate how trustworthy you feel each of the following is for providing COVID-19 safety information. (Question added W2)

Trustworthy Sources of Information



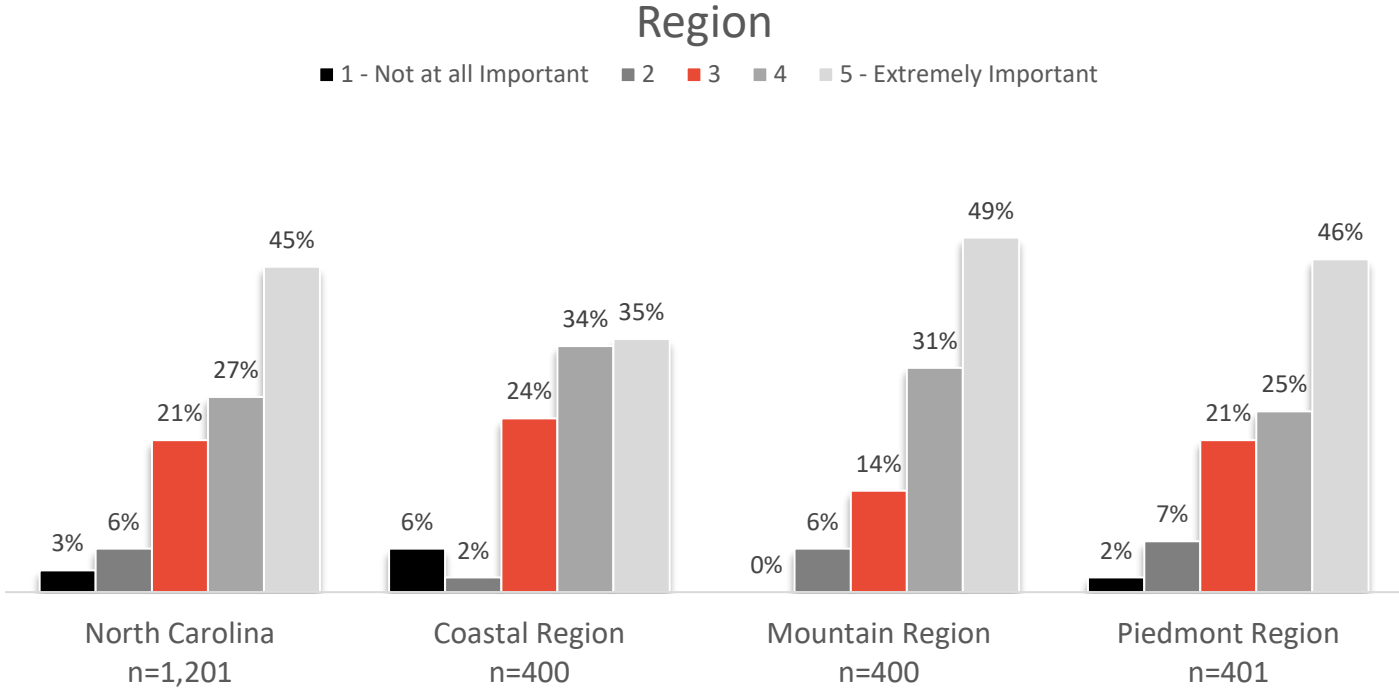
Q1a: Using a scale of 1 (not at all trustworthy) to 5 (extremely trustworthy), when planning your travel, please rate how trustworthy you feel each of the following is for providing COVID-19 safety information. (Question added W2)

Trustworthy Sources of Information



Q1a: Using a scale of 1 (not at all trustworthy) to 5 (extremely trustworthy), when planning your travel, please rate how trustworthy you feel each of the following is for providing COVID-19 safety information. (Question added W2)

Tourism Viewed as Important to North Carolina's Post-COVID-19 Recovery



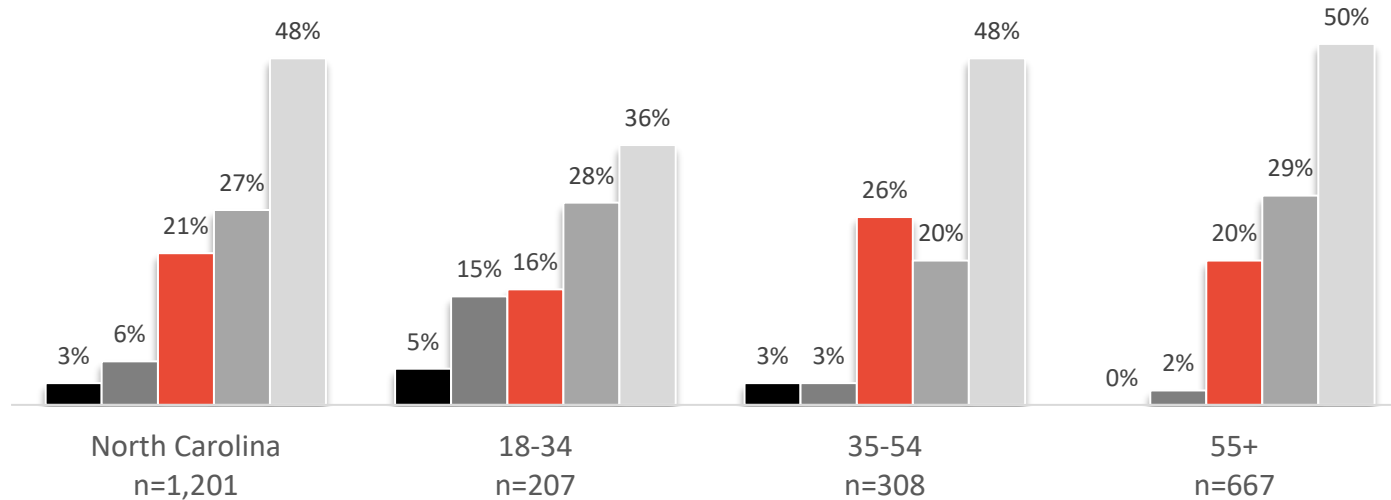
Difference Score	63%	62%	61%	73%
Change from Wave 1	3%	-17%	-13%	19%

Q2: Using a scale of 1 (not at all important) to 5 (extremely important), how important do you think tourism is to the recovery of the North Carolina economy after COVID-19?

Older Residents View Tourism as More Important to North Carolina's Post-COVID-19 Recovery Than Do Younger Residents

Resident Age

■ 1 - Not at all Important ■ 2 ■ 3 ■ 4 ■ 5 - Extremely Important



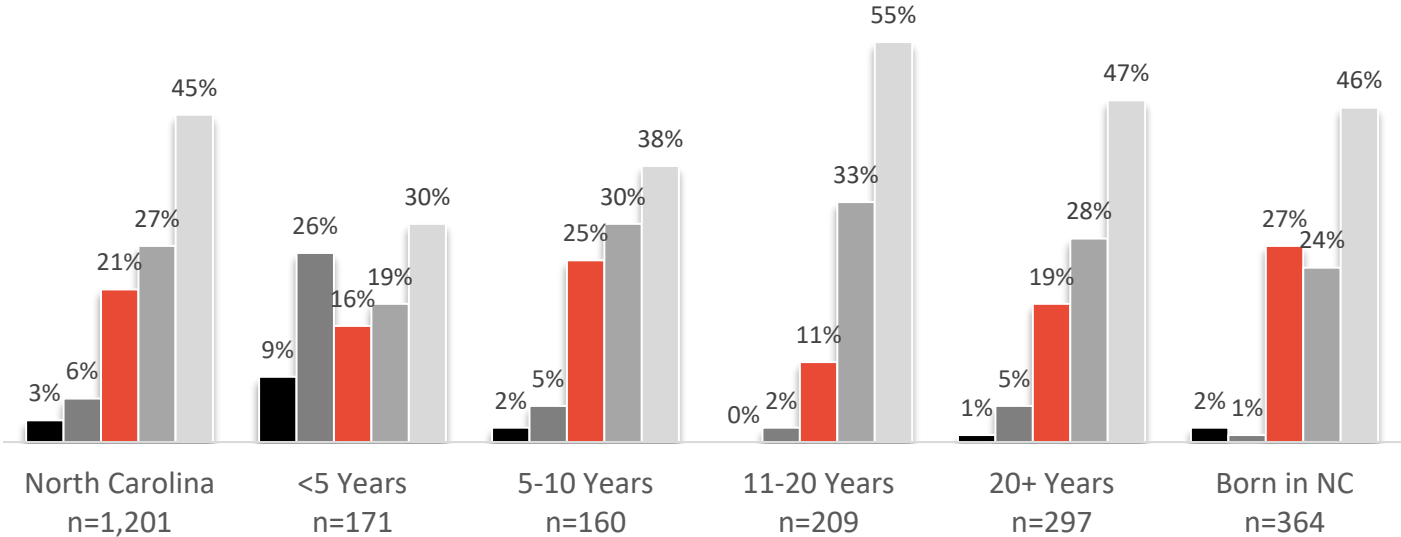
Difference Score	63%	44%	62%	76%
Change from Wave 1	3%	13%	-2%	-7%

Q2: Using a scale of 1 (not at all important) to 5 (extremely important), how important do you think tourism is to the recovery of the North Carolina economy after COVID-19?

Those Living in North Carolina 11 or More Years View Tourism as Important to North Carolina's Post-COVID-19 Recovery

Length of Residency

■ 1 - Not at all Important ■ 2 ■ 3 ■ 4 ■ 5 - Extremely Important

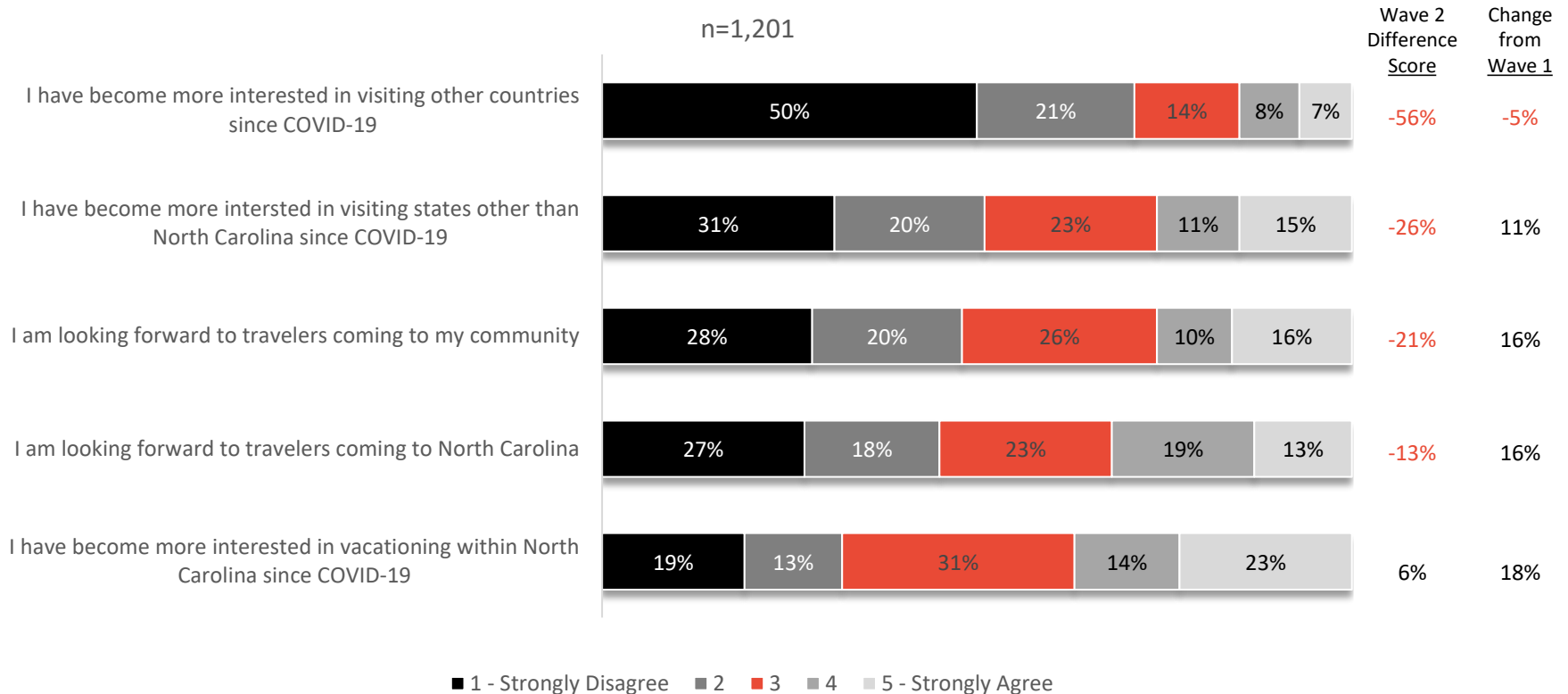


Difference Score	63%	14%	62%	85%	70%	67%
Change from Wave 1	3%	-38%	12%	18%	-5%	12%

Q2: Using a scale of 1 (not at all important) to 5 (extremely important), how important do you think tourism is to the recovery of the North Carolina economy after COVID-19?

North Carolina Residents Not Yet Ready to Travel or Welcome Visitors

North Carolina
n=1,201



Q4: Using a scale of 1 (strongly disagree) to 5 (strongly agree), please indicate your level of agreement with each of the following statements now that the North Carolina COVID-19 restrictions are beginning to ease.

Oldest Residents Most Interested in Vacationing Within North Carolina

North Carolina Difference Scores (%)

	18-34 n=207	35-54 n=308	55+ n=667
I have become more interested in visiting other countries since COVID-19	-35	-68	-61
I have become more interested in visiting states other than North Carolina since COVID-19	-11	-38	-28
I am looking forward to travelers coming to my community	-20	-18	-25
I am looking forward to travelers coming to North Carolina	-10	-14	-15
I have become more interested in vacationing within North Carolina since COVID-19	1	6	10

Q4: Using a scale of 1 (strongly disagree) to 5 (strongly agree), please indicate your level of agreement with each of the following statements now that the North Carolina COVID-19 restrictions are beginning to ease.

Those Residing in North Carolina Between 11 and 20 Years Only Group With a Positive Sentiment Toward Travel in North Carolina

North Carolina Difference Scores (%)

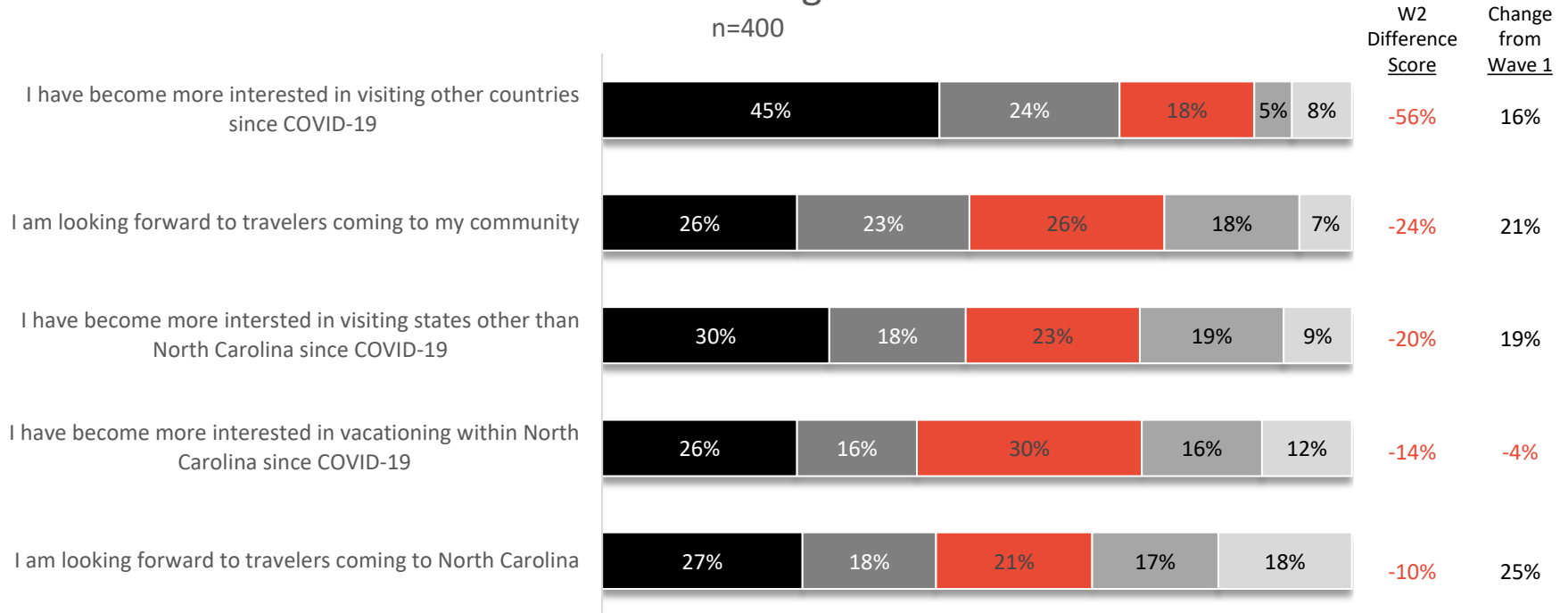
	<5 Years n=171	5-10 Years n=160	11-20 Years n=209	20+ Years n=297	Born in NC n=364
I have become more interested in visiting other countries since COVID-19	-68	-47	-33	-53	-66
I have become more interested in visiting states other than North Carolina since COVID-19	-49	-15	2	-11	-45
I am looking forward to travelers coming to my community	-2	-2	-23	-11	-42
I am looking forward to travelers coming to North Carolina	3	1	-11	-12	-25
I have become more interested in vacationing within North Carolina since COVID-19	37	-10	11	8	-5

Q4: Using a scale of 1 (strongly disagree) to 5 (strongly agree), please indicate your level of agreement with each of the following statements now that the North Carolina COVID-19 restrictions are beginning to ease.

Interest in Traveling and Welcoming Visitors

Coastal Region

n=400



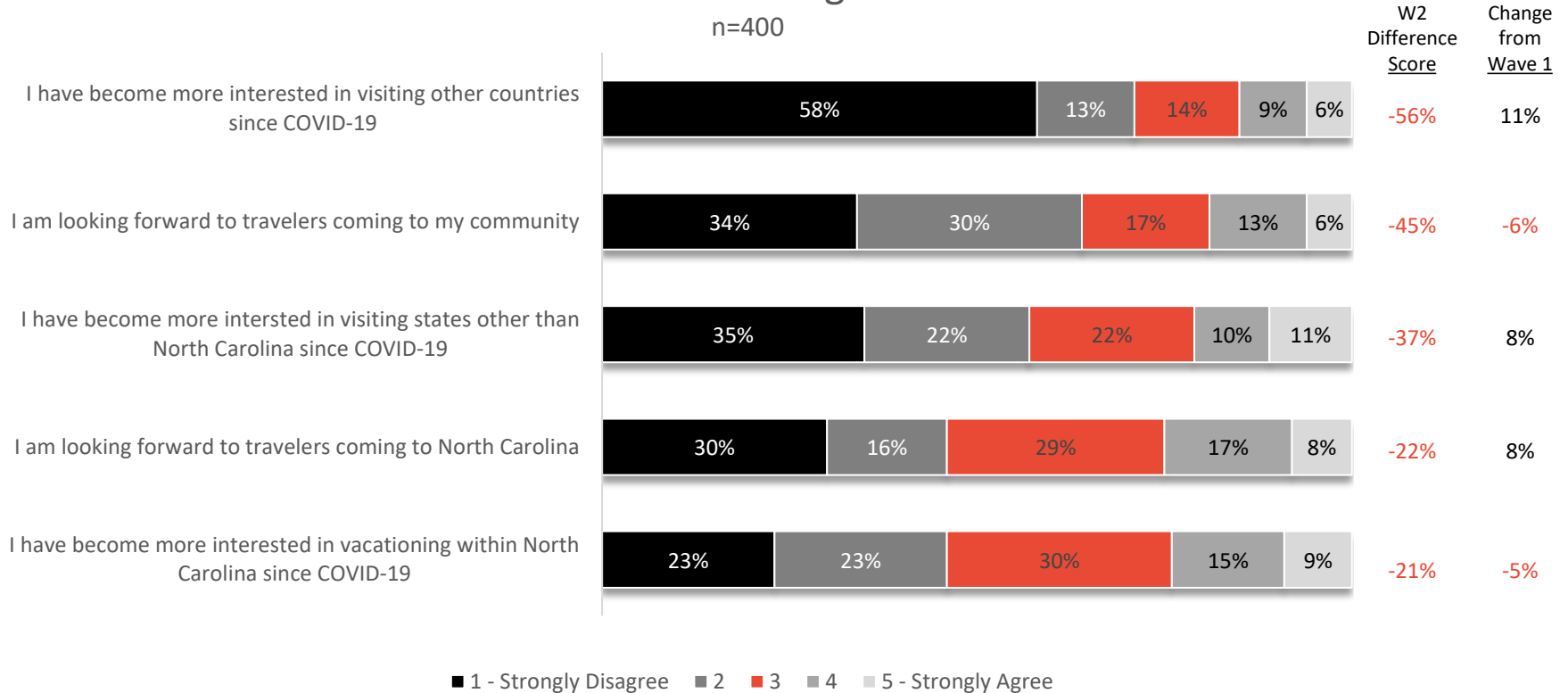
■ 1 - Strongly Disagree ■ 2 ■ 3 ■ 4 ■ 5 - Strongly Agree

Q4: Using a scale of 1 (strongly disagree) to 5 (strongly agree), please indicate your level of agreement with each of the following statements now that the North Carolina COVID-19 restrictions are beginning to ease.

Interest in Traveling and Welcoming Visitors

Mountain Region

n=400

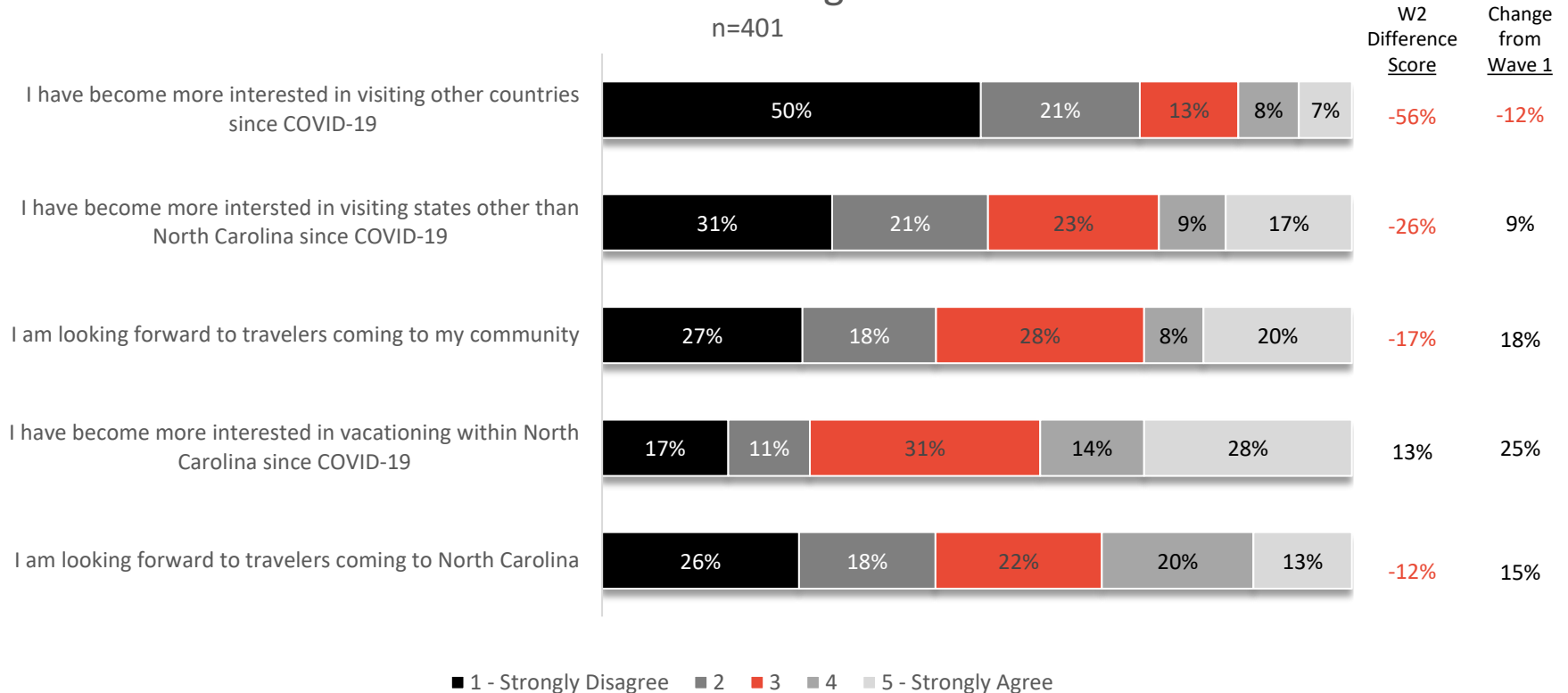


Q4: Using a scale of 1 (strongly disagree) to 5 (strongly agree), please indicate your level of agreement with each of the following statements now that the North Carolina COVID-19 restrictions are beginning to ease.

Interest in Traveling and Welcoming Visitors

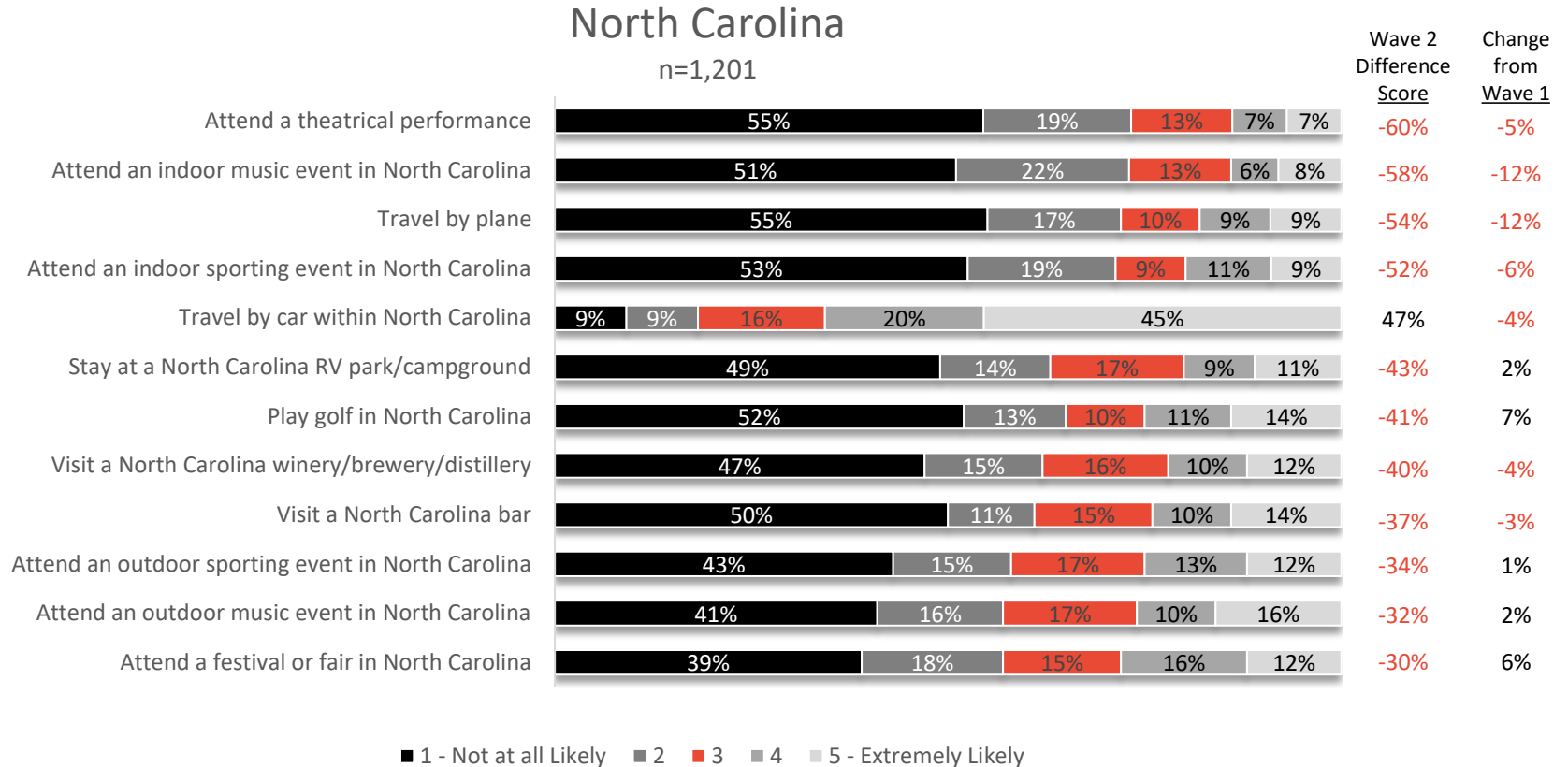
Piedmont Region

n=401



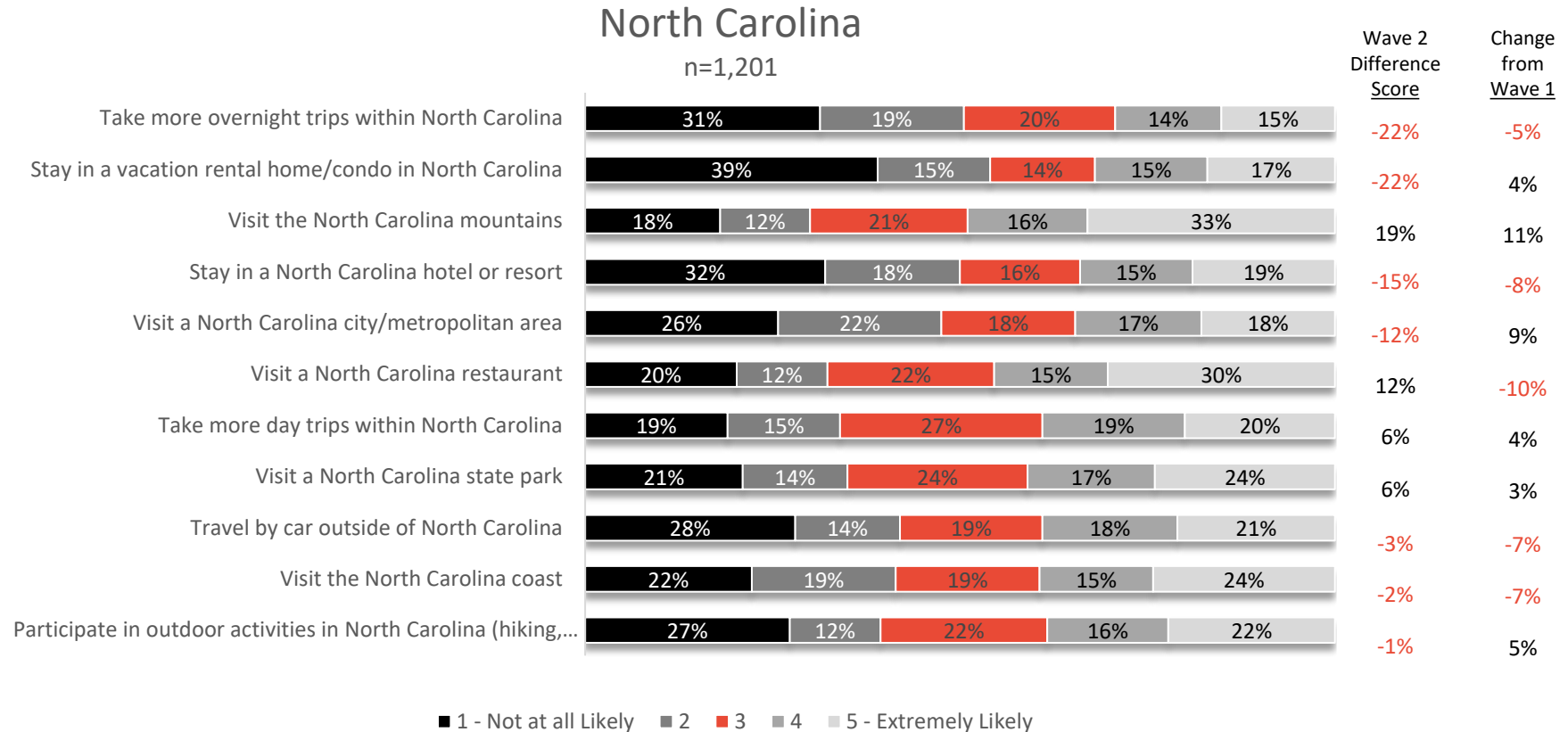
Q4: Using a scale of 1 (strongly disagree) to 5 (strongly agree), please indicate your level of agreement with each of the following statements now that the North Carolina COVID-19 restrictions are beginning to ease.

Traveling by Car to North Carolina Outdoor Destinations Most Likely in Next 3 Months



Q5: Using a scale of 1 (not at all likely) to 5 (extremely likely), please indicate how likely you are to engage in each of the following activities during the next 3 months now that the North Carolina COVID-19 restrictions are beginning to ease.

Traveling by Car to North Carolina Outdoor Destinations Most Likely in Next 3 Months



Q5: Using a scale of 1 (not at all likely) to 5 (extremely likely), please indicate how likely you are to engage in each of the following activities during the next 3 months now that the North Carolina COVID-19 restrictions are beginning to ease.

All Residents Very Likely to Travel by Car Within North Carolina During the Next Three Months

North Carolina Difference Scores (%)

	18-34 n=207	35-54 n=308	55+ n=667
Attend a theatrical performance	-43	-55	-75
Attend an indoor music event in North Carolina	-52	-45	-72
Travel by plane	-43	-47	-65
Attend an indoor sporting event in North Carolina	-23	-49	-77
Travel by car within North Carolina	41	44	53
Stay at a North Carolina RV park/campground	-27	-33	-63
Play golf in North Carolina	-18	-53	-47
Visit a North Carolina winery/brewery/distillery	-37	-24	-54
Visit a North Carolina bar	-7	-28	-64
Attend an outdoor sporting event in North Carolina	-12	-24	-59
Attend an outdoor music event in North Carolina	-4	-23	-60
Attend a festival or fair in North Carolina	3	-32	-54

Q5: Using a scale of 1 (not at all likely) to 5 (extremely likely), please indicate how likely you are to engage in each of the following activities during the next 3 months now that the North Carolina COVID-19 restrictions are beginning to ease.

And, Residents 35-54 Years of Age Most Likely Visitors to North Carolina Destinations During the Next Three Months

North Carolina Difference Scores (%)

	18-34 n=207	35-54 n=308	55+ n=667
Take more overnight trips within North Carolina	-23	2	-38
Stay in a vacation rental home/condo in North Carolina	--	-9	-49
Visit the North Carolina mountains	13	27	17
Stay in a North Carolina hotel or resort	8	-22	-26
Visit a North Carolina city/metropolitan area	12	-9	-34
Visit a North Carolina restaurant	15	18	9
Take more day trips within North Carolina	10	9	--
Visit a North Carolina state park	14	14	-7
Travel by car outside of North Carolina	3	3	-11
Visit the North Carolina coast	-19	-3	11
Participate in outdoor activities in North Carolina (hiking, biking, kayaking, etc.)	16	7	-19

Q5: Using a scale of 1 (not at all likely) to 5 (extremely likely), please indicate how likely you are to engage in each of the following activities during the next 3 months now that the North Carolina COVID-19 restrictions are beginning to ease.

All Residents, Regardless of How Long They Have Lived in the State are Likely to Travel by Car Within North Carolina During the Next Three Months

North Carolina Difference Scores (%)

	<5 Years n=171	5-10 Years n=160	11-20 Years n=209	20+ Years n=297	Born in NC n=364
Attend a theatrical performance	-58	-45	-62	-53	-69
Attend an indoor music event in North Carolina	-57	-56	-68	-53	-59
Travel by plane	-42	-48	-45	-53	-65
Attend an indoor sporting event in North Carolina	-52	-38	-48	-47	-62
Travel by car within North Carolina	59	41	46	49	44
Stay at a North Carolina RV park/campground	-61	-36	-45	-27	-51
Play golf in North Carolina	-18	-45	-28	-32	-61
Visit a North Carolina winery/brewery/distillery	-61	-30	-38	-38	-37
Visit a North Carolina bar	-35	-34	-23	-43	-39
Attend an outdoor sporting event in North Carolina	-20	-20	-29	-43	-39
Attend an outdoor music event in North Carolina	3	-31	-31	-42	-39
Attend a festival or fair in North Carolina	--	-22	-41	-36	-35

Q5: Using a scale of 1 (not at all likely) to 5 (extremely likely), please indicate how likely you are to engage in each of the following activities during the next 3 months now that the North Carolina COVID-19 restrictions are beginning to ease.

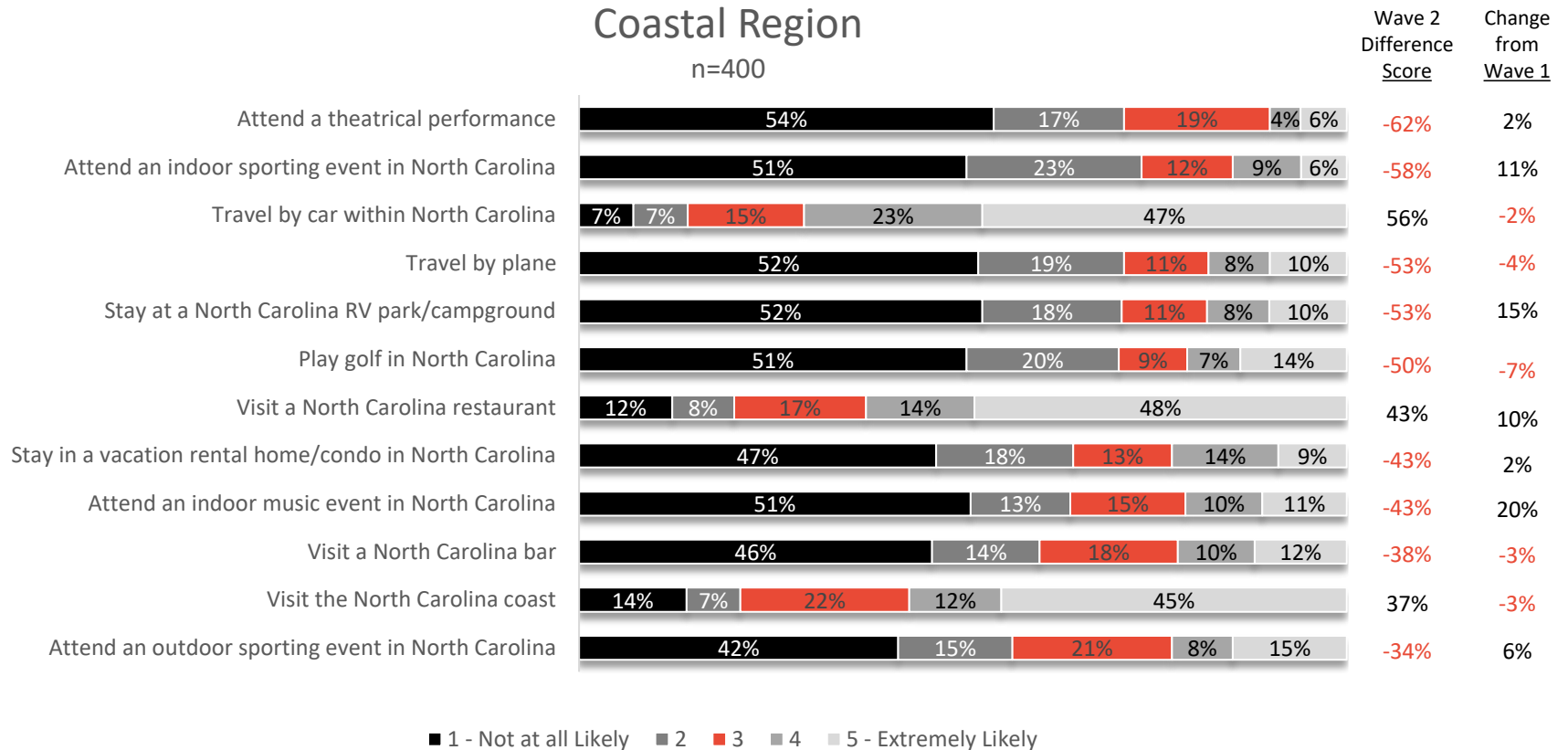
But, Those Residing in the State Between 5 and 10 Years Are Least Likely to Travel to Most North Carolina Destinations During the Next Three Months

North Carolina Difference Scores (%)

	<5 Years n=171	5-10 Years n=160	11-20 Years n=209	20+ Years n=297	Born in NC n=364
Take more overnight trips within North Carolina	-33	-11	-36	-10	-23
Stay in a vacation rental home/condo in North Carolina	9	--	-39	-37	-23
Visit the North Carolina mountains	26	13	1	33	14
Stay in a North Carolina hotel or resort	12	-15	-26	-20	-18
Visit a North Carolina city/metropolitan area	12	11	-19	-21	-20
Visit a North Carolina restaurant	12	18	-1	13	18
Take more day trips within North Carolina	6	9	12	10	--
Visit a North Carolina state park	31	15	11	15	-17
Travel by car outside of North Carolina	29	14	-3	-9	-16
Visit the North Carolina coast	-15	7	-8	15	-10
Participate in outdoor activities in North Carolina (hiking, biking, kayaking, etc.)	27	15	6	--	-20

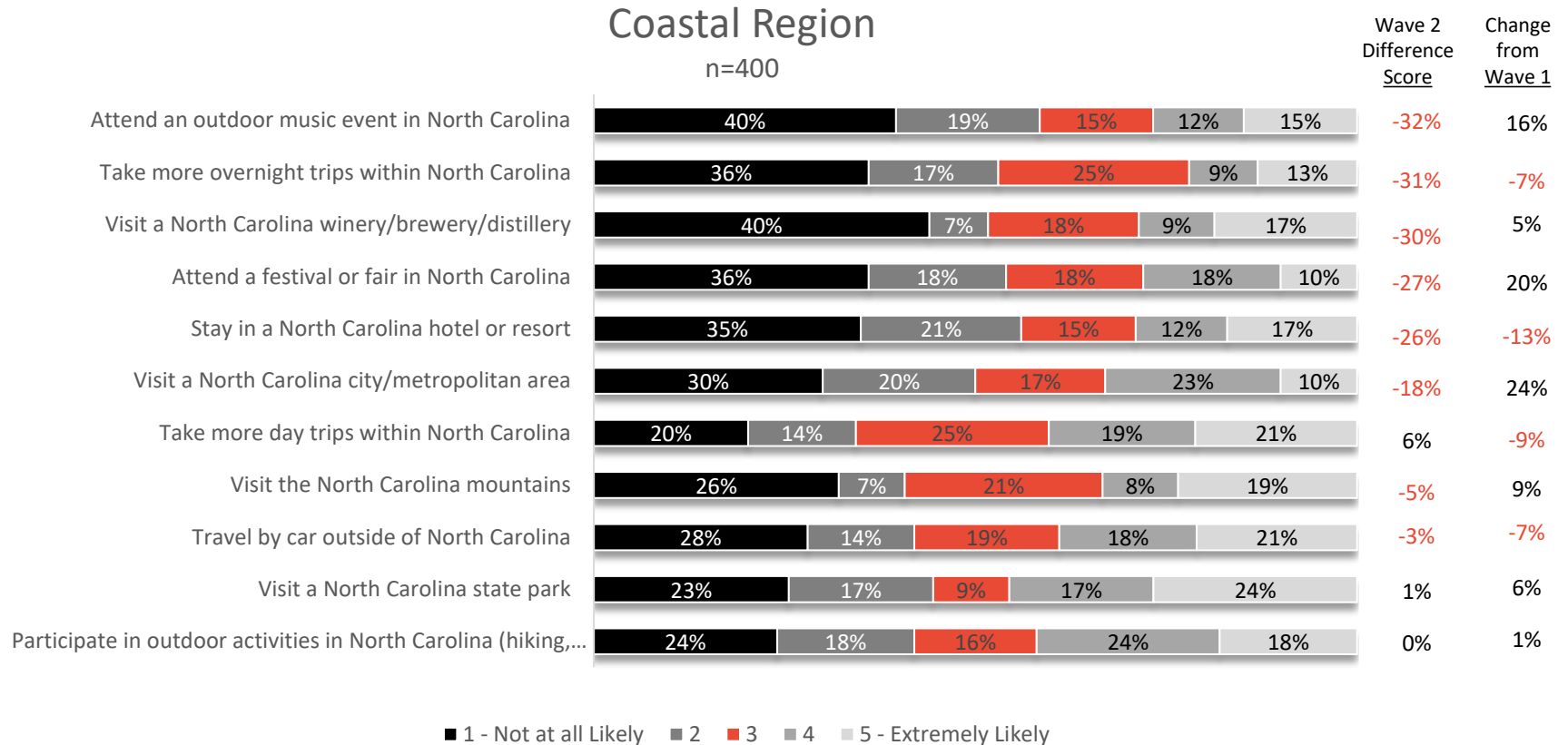
Q5: Using a scale of 1 (not at all likely) to 5 (extremely likely), please indicate how likely you are to engage in each of the following activities during the next 3 months now that the North Carolina COVID-19 restrictions are beginning to ease.

Travel Activities During Next Three Months



Q5: Using a scale of 1 (not at all likely) to 5 (extremely likely), please indicate how likely you are to engage in each of the following activities during the next 3 months now that the North Carolina COVID-19 restrictions are beginning to ease.

Travel Activities During Next Three Months

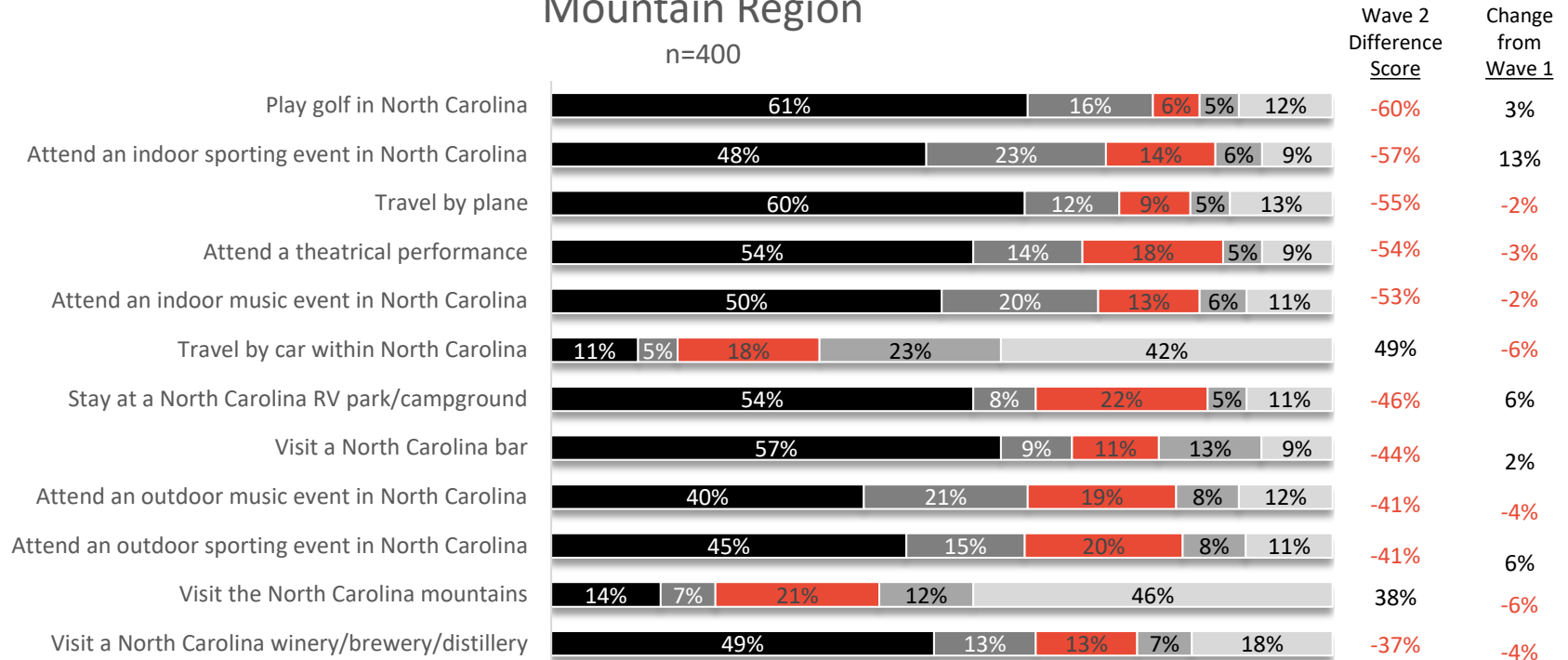


Q5: Using a scale of 1 (not at all likely) to 5 (extremely likely), please indicate how likely you are to engage in each of the following activities during the next 3 months now that the North Carolina COVID-19 restrictions are beginning to ease.

Travel Activities During Next Three Months

Mountain Region

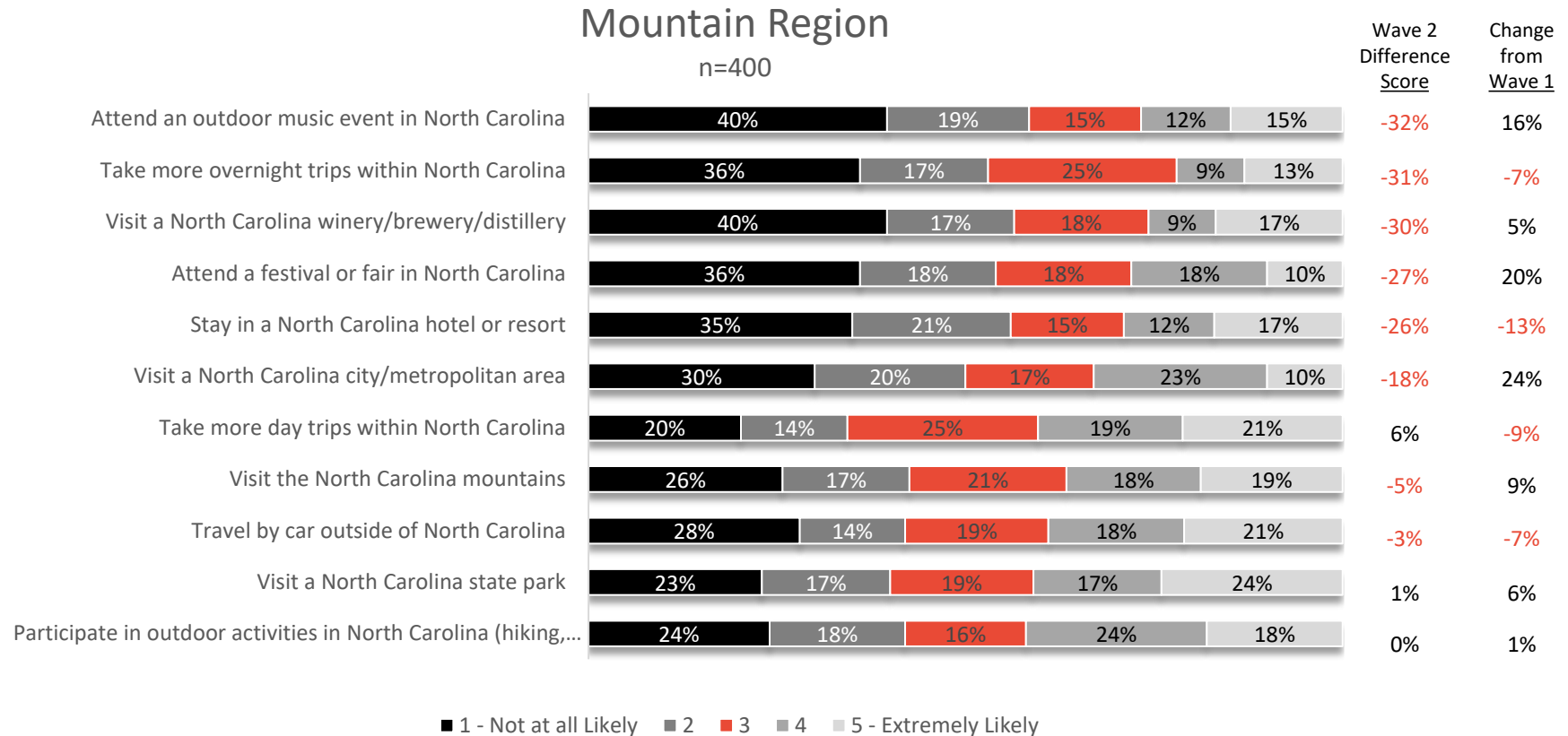
n=400



■ 1 - Not at all Likely ■ 2 ■ 3 ■ 4 ■ 5 - Extremely Likely

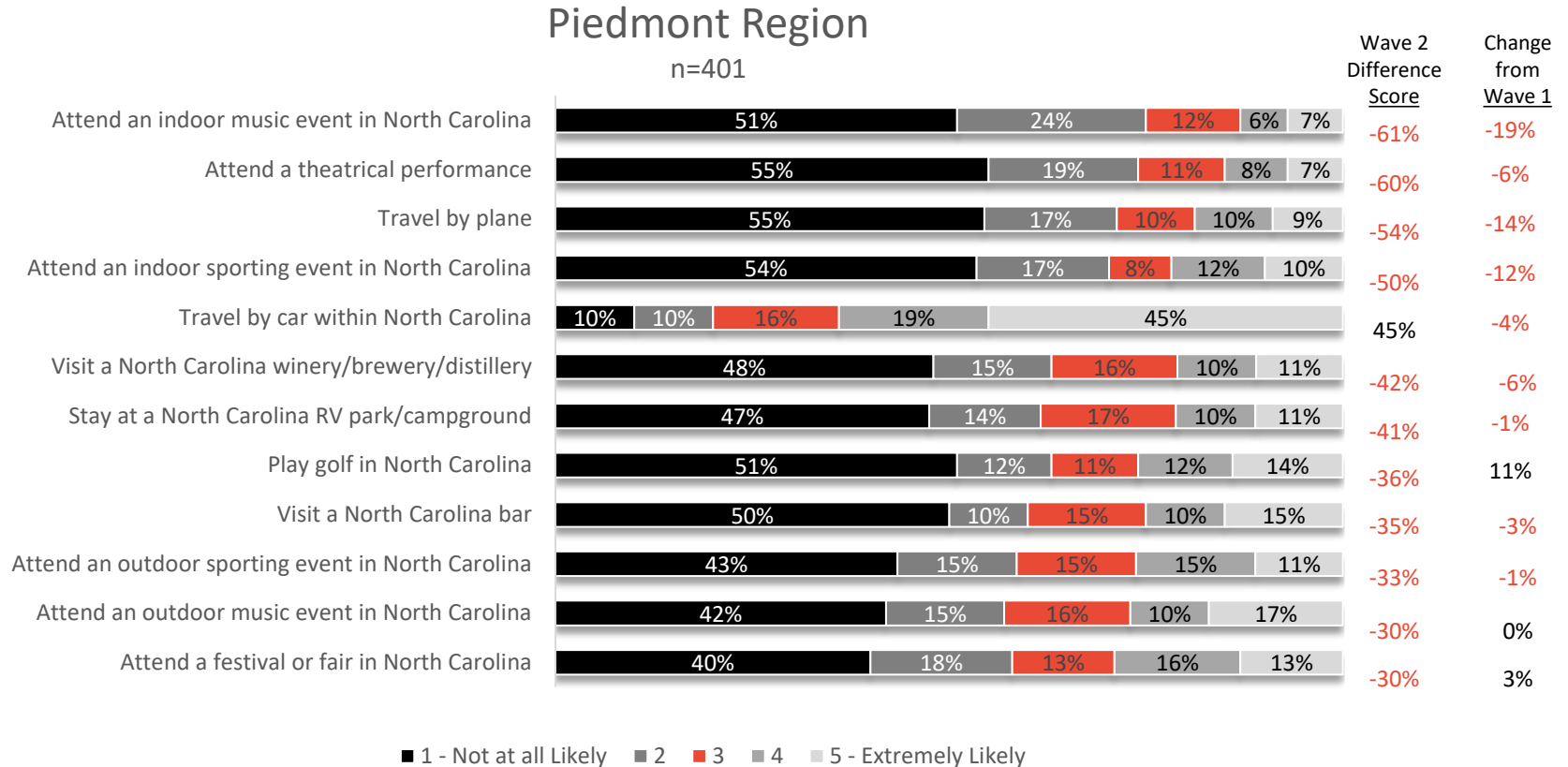
Q5: Using a scale of 1 (not at all likely) to 5 (extremely likely), please indicate how likely you are to engage in each of the following activities during the next 3 months now that the North Carolina COVID-19 restrictions are beginning to ease.

Travel Activities During Next Three Months



Q5: Using a scale of 1 (not at all likely) to 5 (extremely likely), please indicate how likely you are to engage in each of the following activities during the next 3 months now that the North Carolina COVID-19 restrictions are beginning to ease.

Travel Activities During Next Three Months

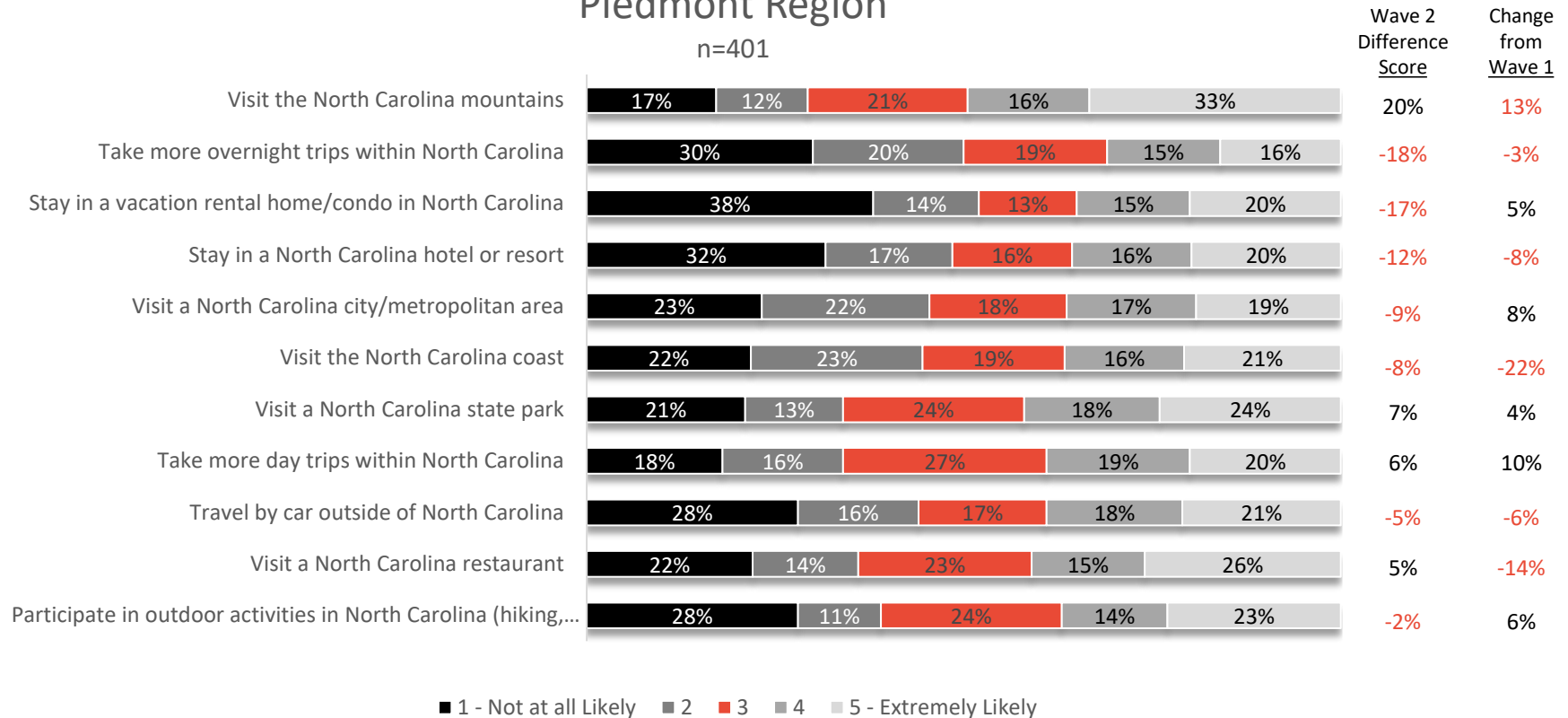


Q5: Using a scale of 1 (not at all likely) to 5 (extremely likely), please indicate how likely you are to engage in each of the following activities during the next 3 months now that the North Carolina COVID-19 restrictions are beginning to ease.

Travel Activities During Next Three Months

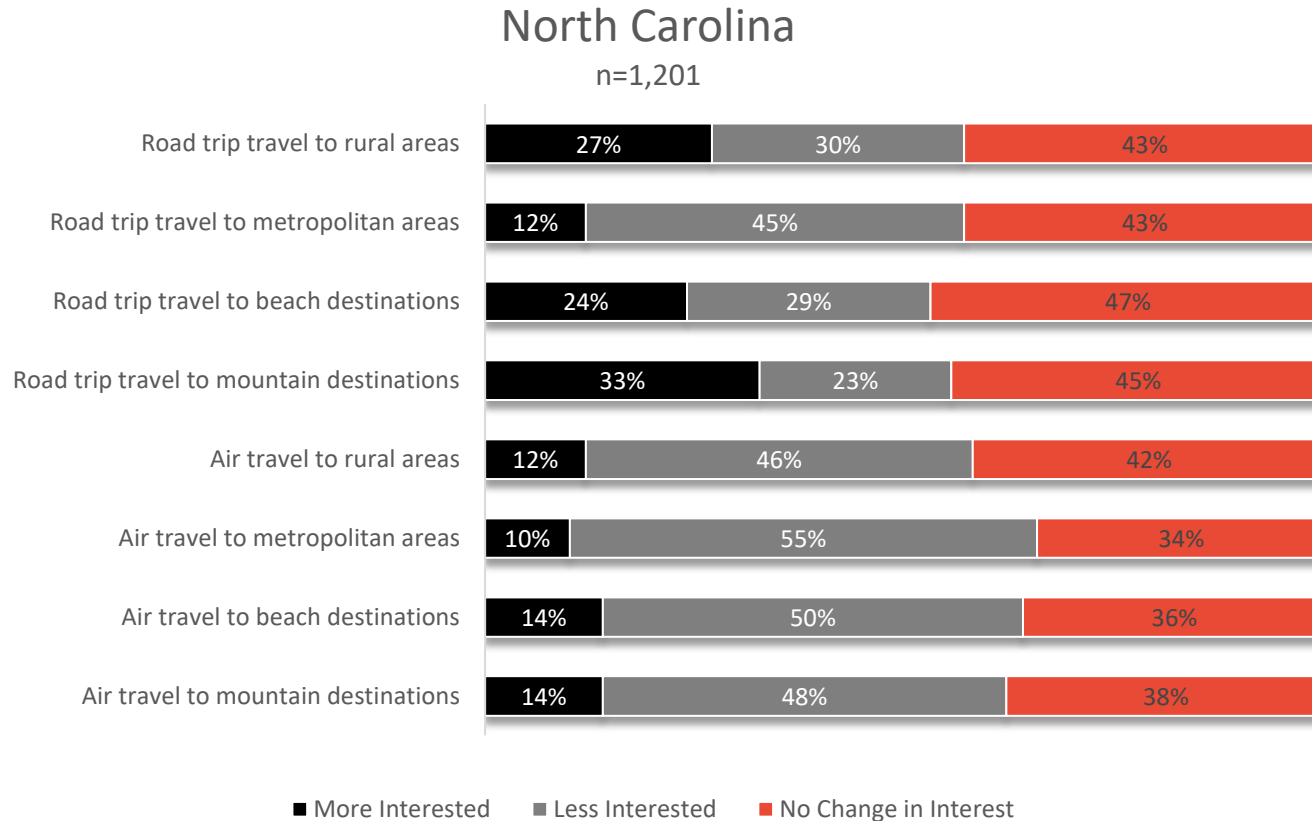
Piedmont Region

n=401



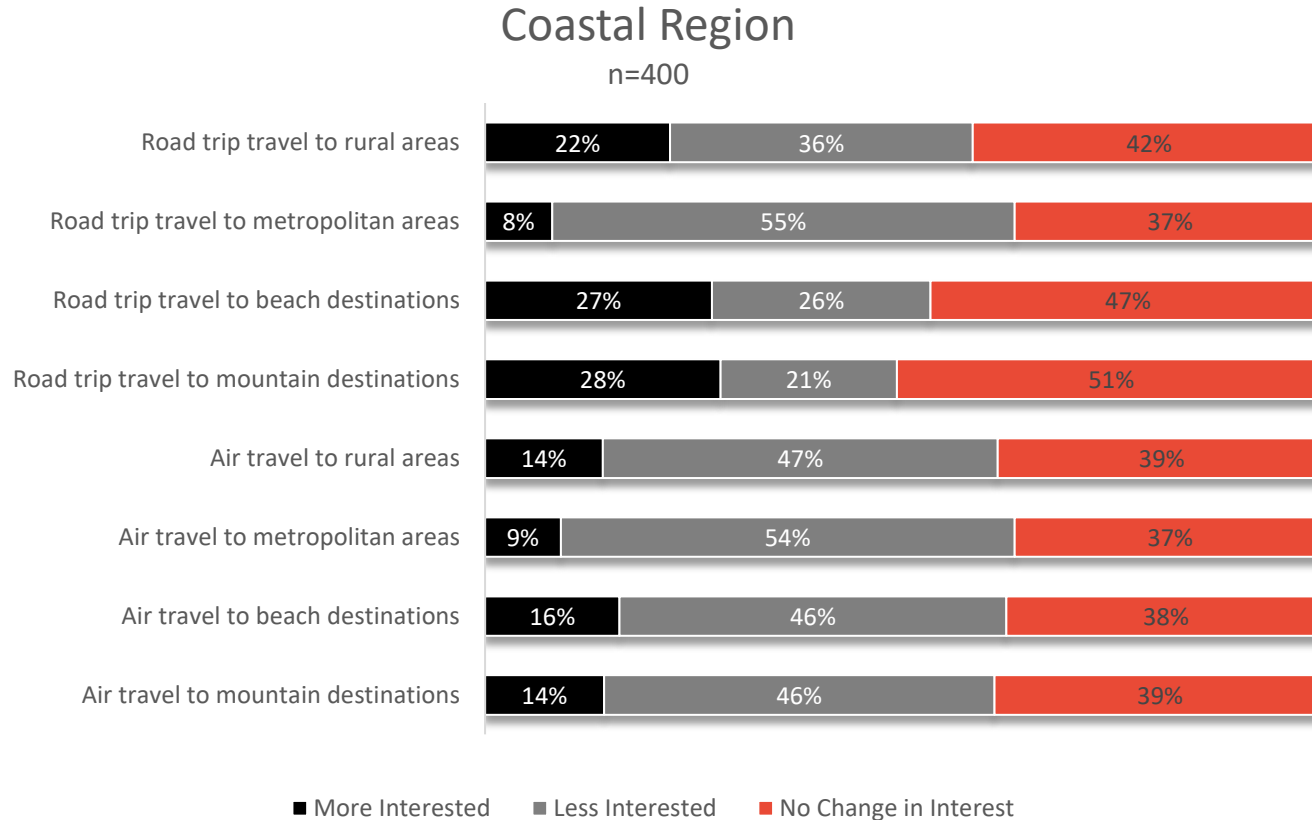
Q5: Using a scale of 1 (not at all likely) to 5 (extremely likely), please indicate how likely you are to engage in each of the following activities during the next 3 months now that the North Carolina COVID-19 restrictions are beginning to ease.

COVID-19 Had Made North Carolina Residents More Interested in Road Trips to Mountain, Beach and Rural Destinations



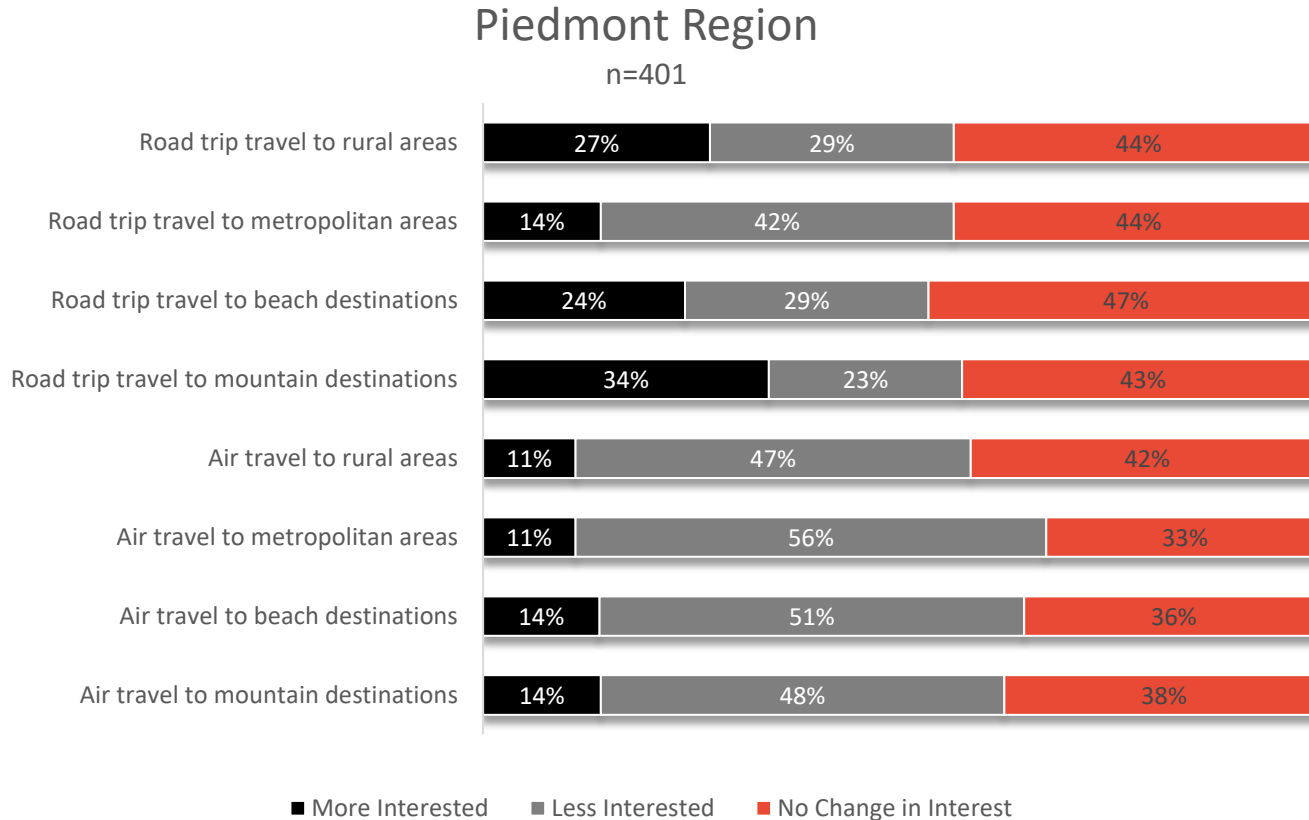
Q5a: Has COVID-19 changed your interest level in each of the following types of trips? (Question added W2)

Impact of COVID-19 on Air and Auto Trips



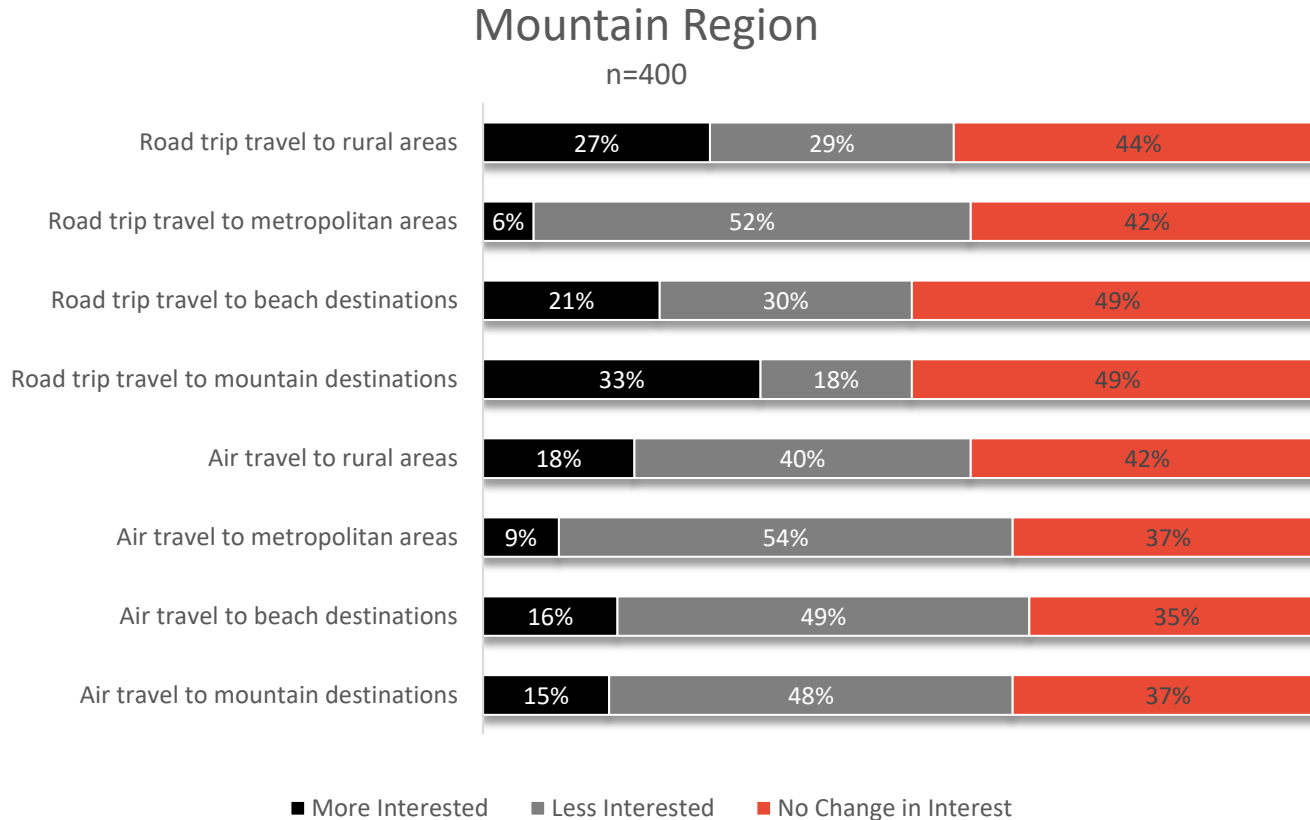
Q5a: Has COVID-19 changed your interest level in each of the following types of trips? (Question added W2)

Impact of COVID-19 on Air and Auto Trips



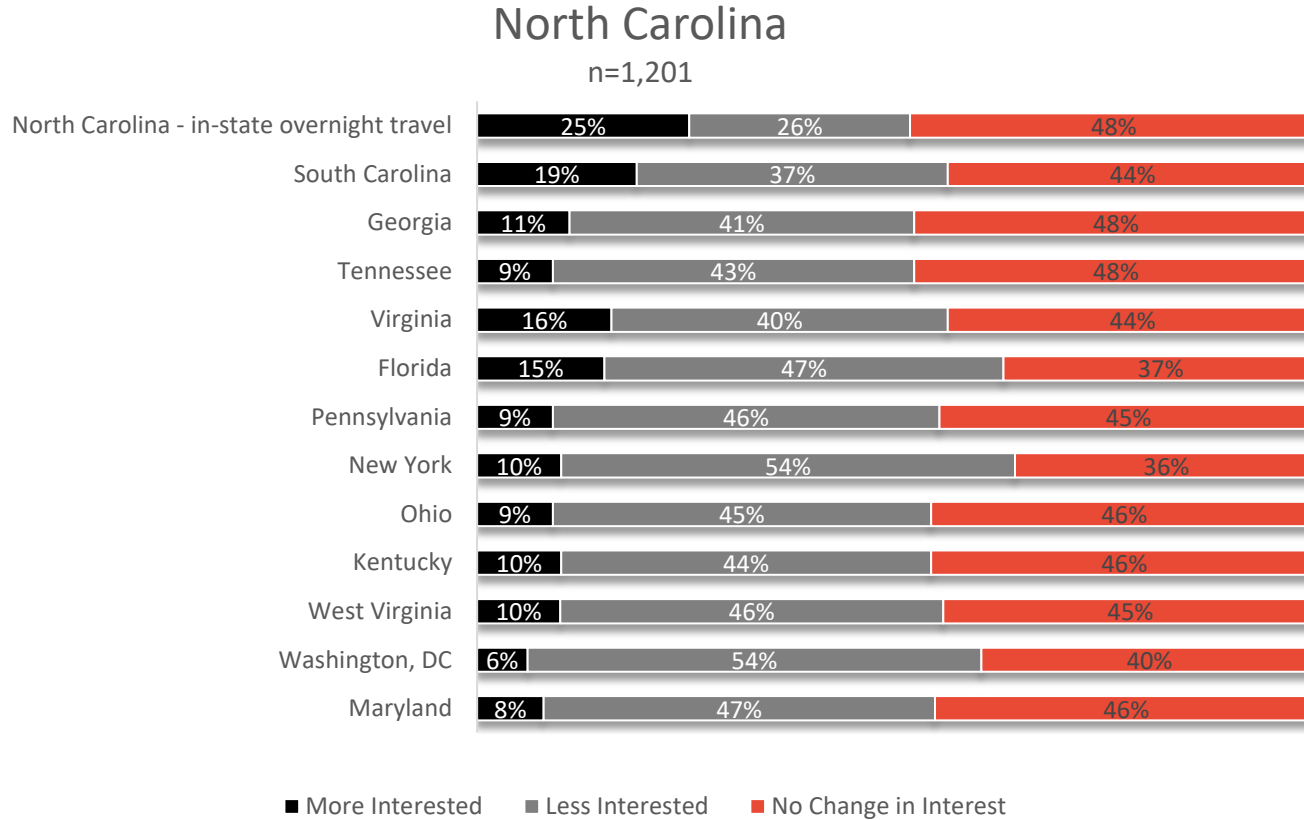
Q5a: Has COVID-19 changed your interest level in each of the following types of trips? (Question added W2)

Impact of COVID-19 on Air and Auto Trips



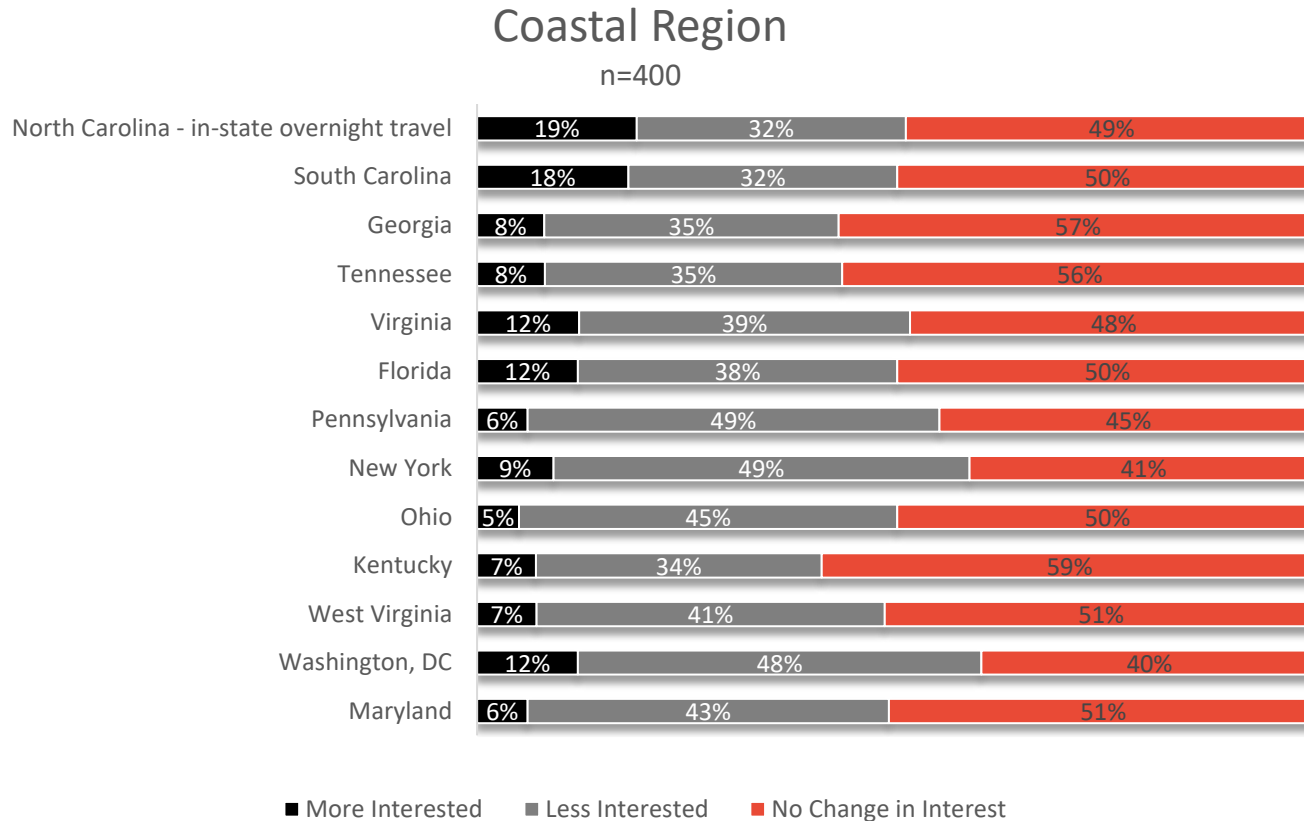
Q5a: Has COVID-19 changed your interest level in each of the following types of trips? (Question added W2)

One in Four North Carolina Residents are More Interested in Overnight Travel Within the State



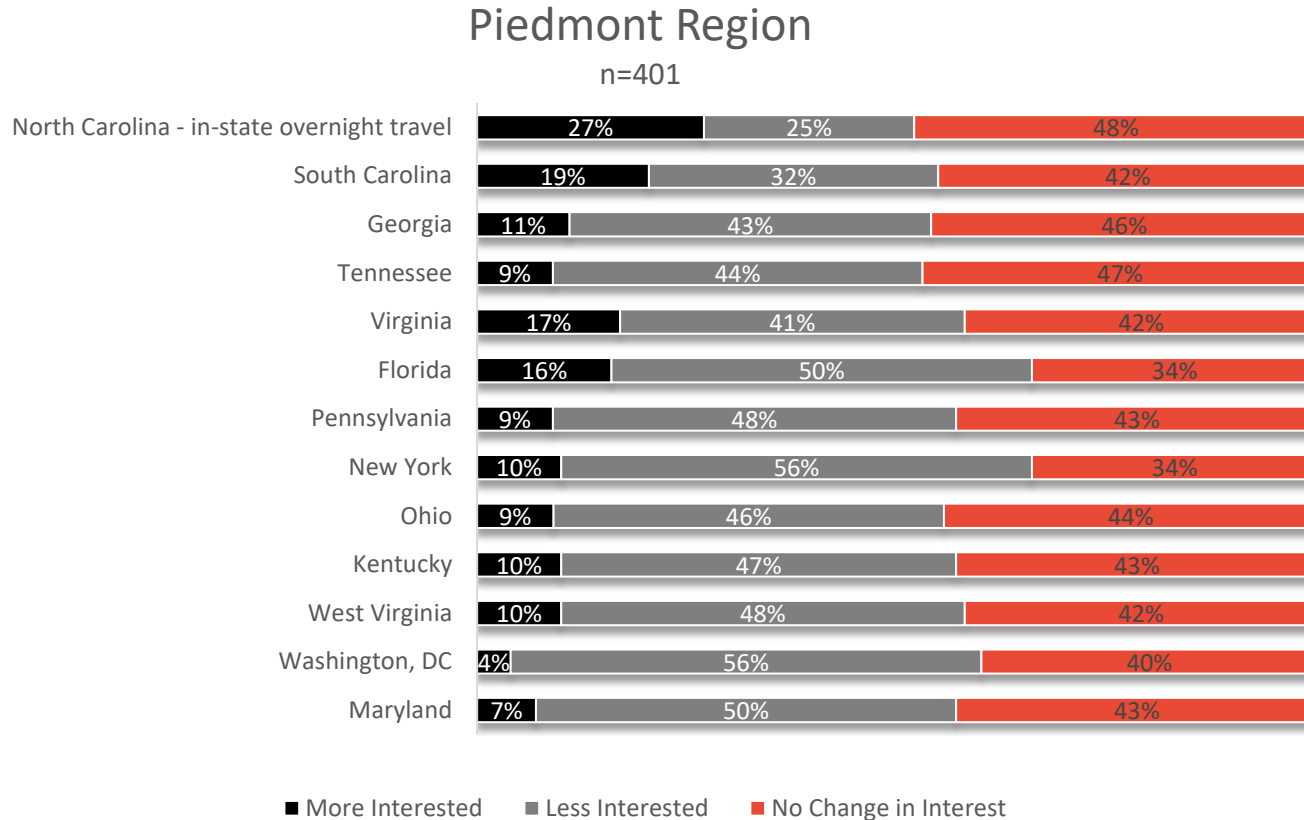
Q5b: Has COVID-19 changed your interest in visiting each of the following states? (Question added W2)

Impact of COVID-19 on Interest in Visiting Other States



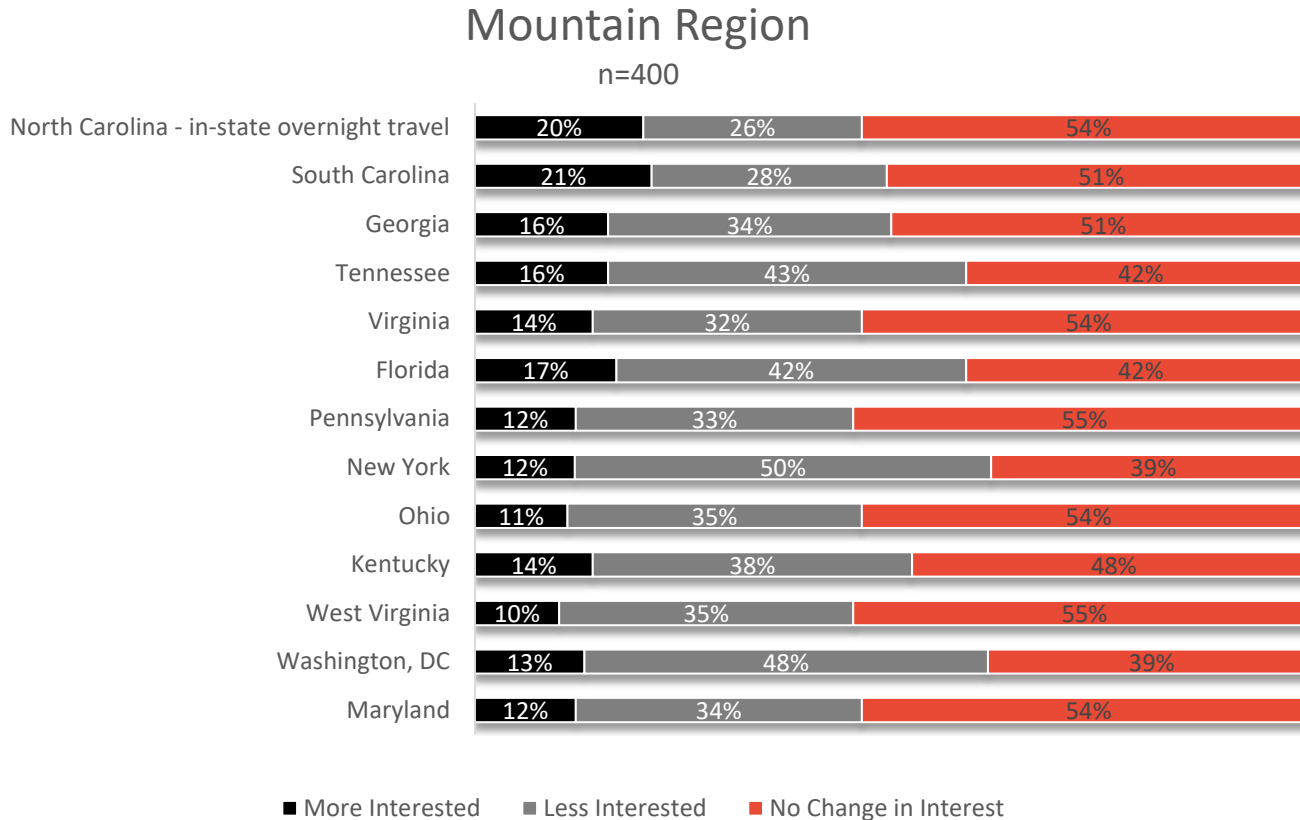
Q5b: Has COVID-19 changed your interest in visiting each of the following states? (Question added W2)

Impact of COVID-19 on Interest in Visiting Other States



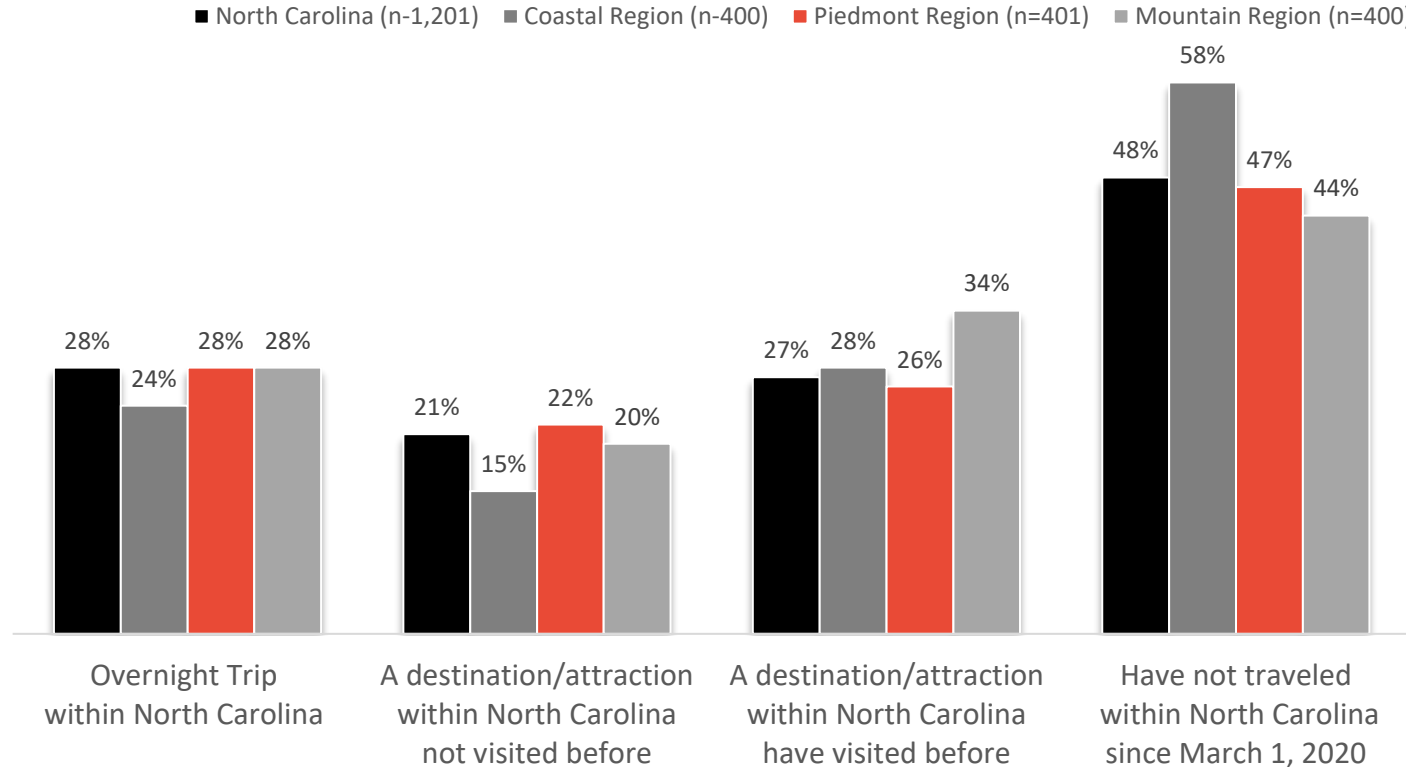
Q5b: Has COVID-19 changed your interest in visiting each of the following states? (Question added W2)

Impact of COVID-19 on Interest in Visiting Other States



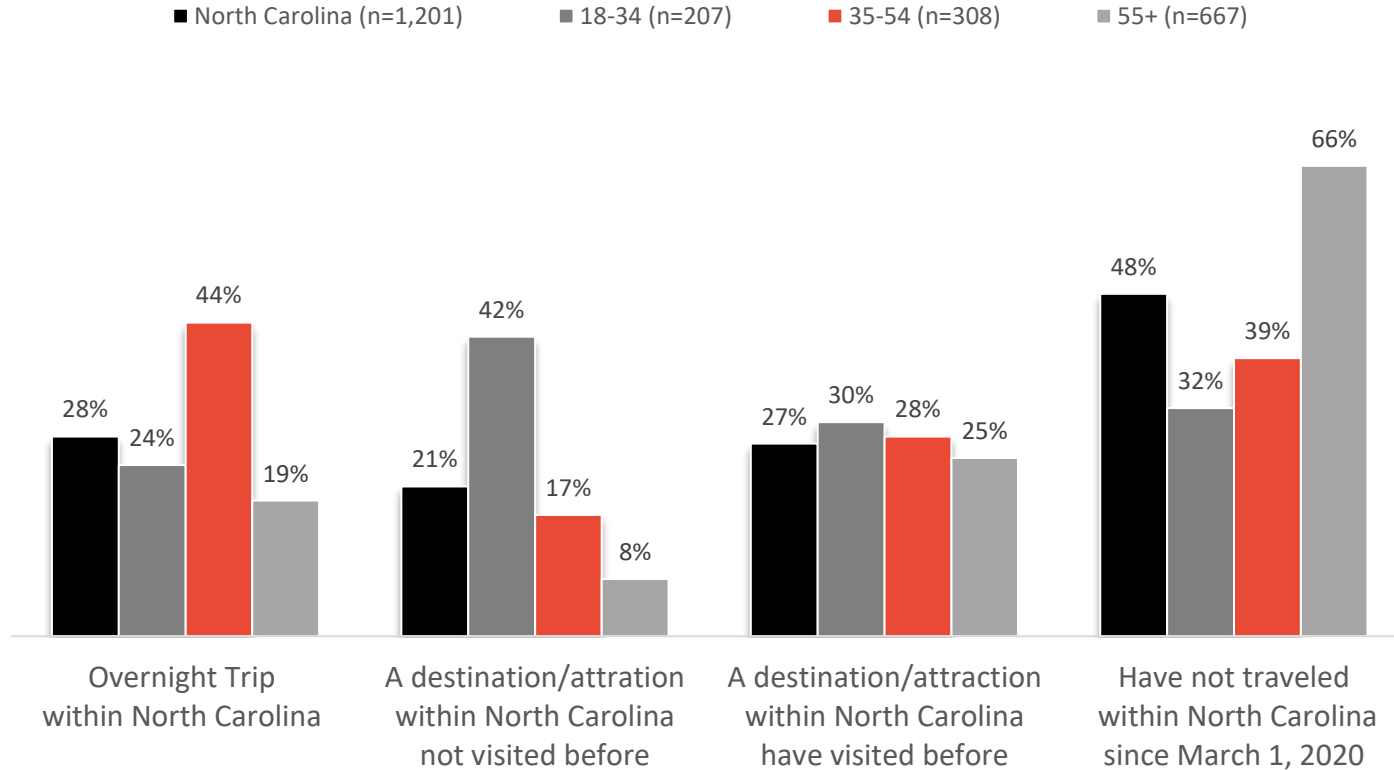
Q5b: Has COVID-19 changed your interest in visiting each of the following states? (Question added W2)

Most residents, Particularly Coastal Residents Have not Traveled Within North Carolina Since March 1, 2020



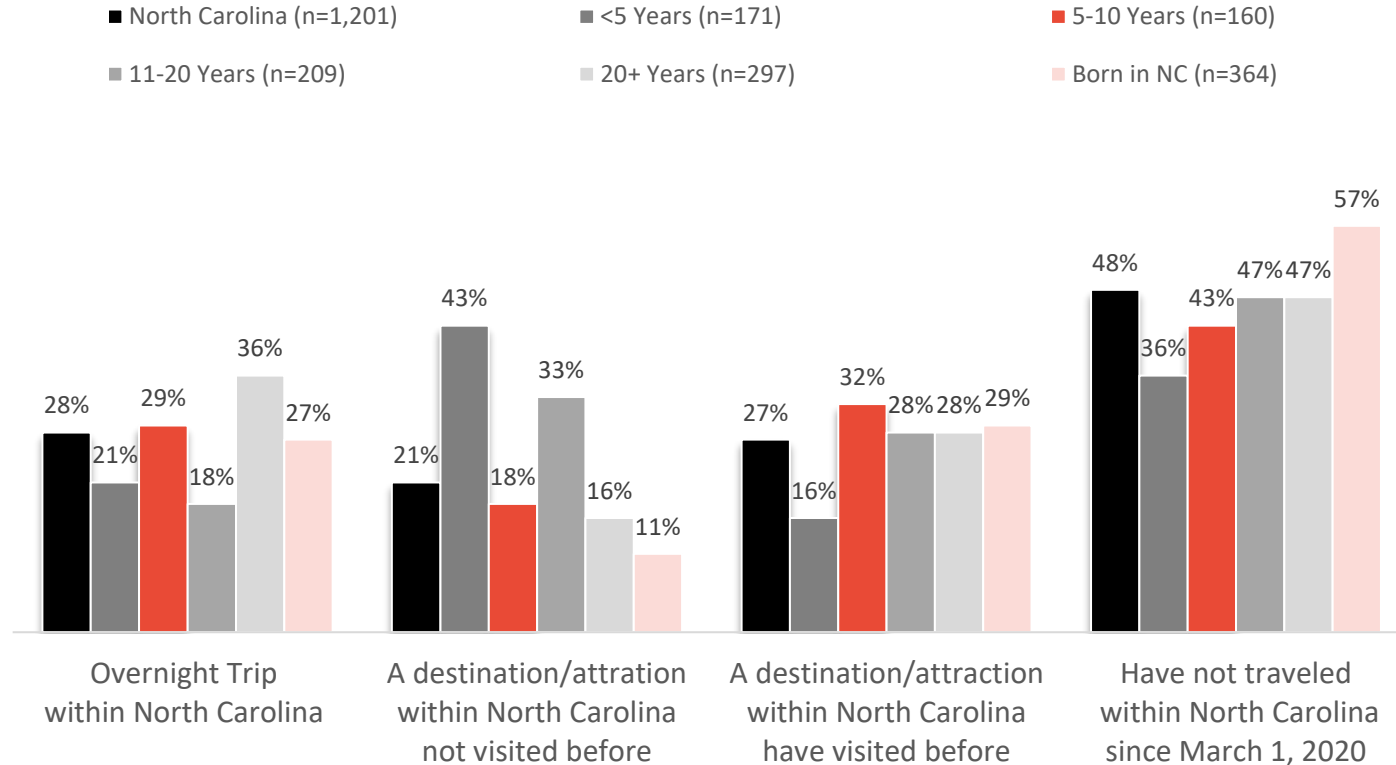
Q6a: Since March 1, 2020, have you taken any of the following types of trips? (Question added W2)

Younger Residents Were More Likely to Travel Within North Carolina Since March 1, 2020



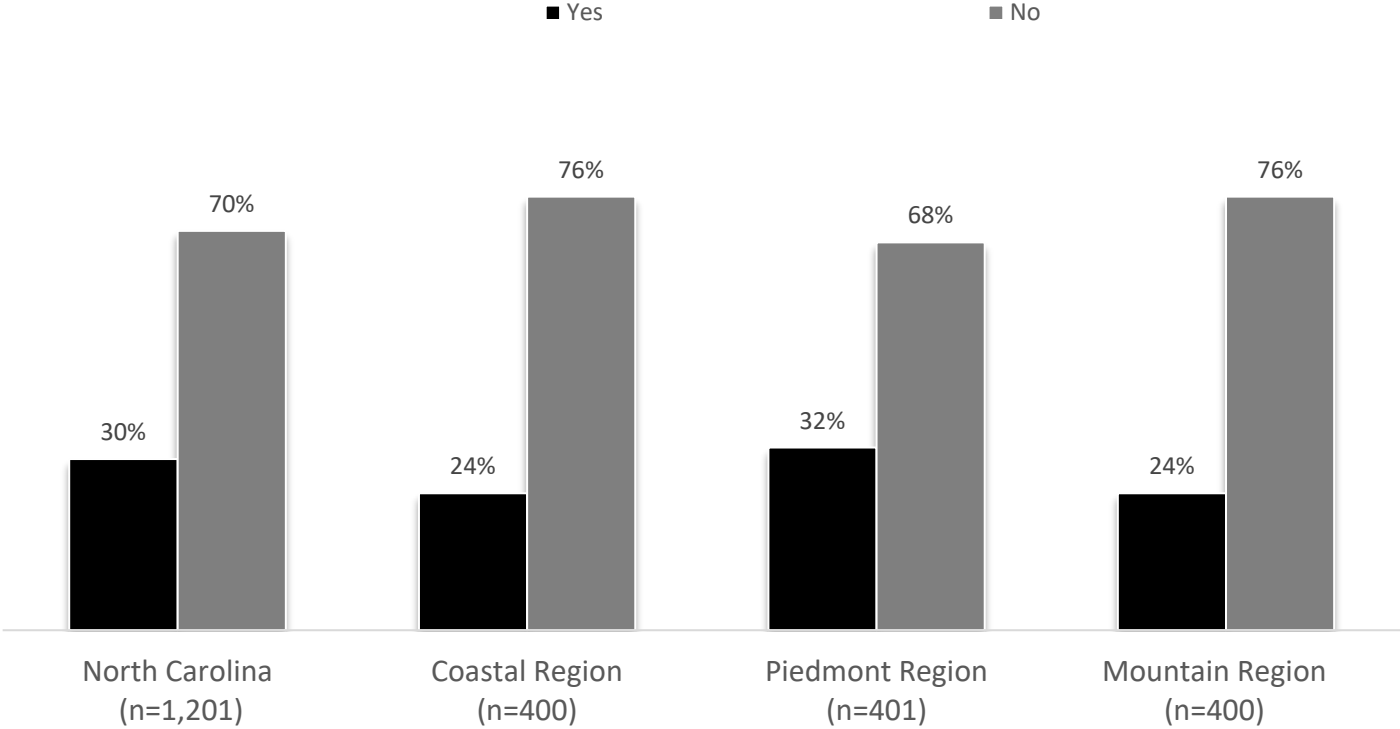
Q6a: Since March 1, 2020, have you taken any of the following types of trips? (Question added W2)

Residents Born in North Carolina Were Least Likely to Travel Within North Carolina Since March 1, 2020



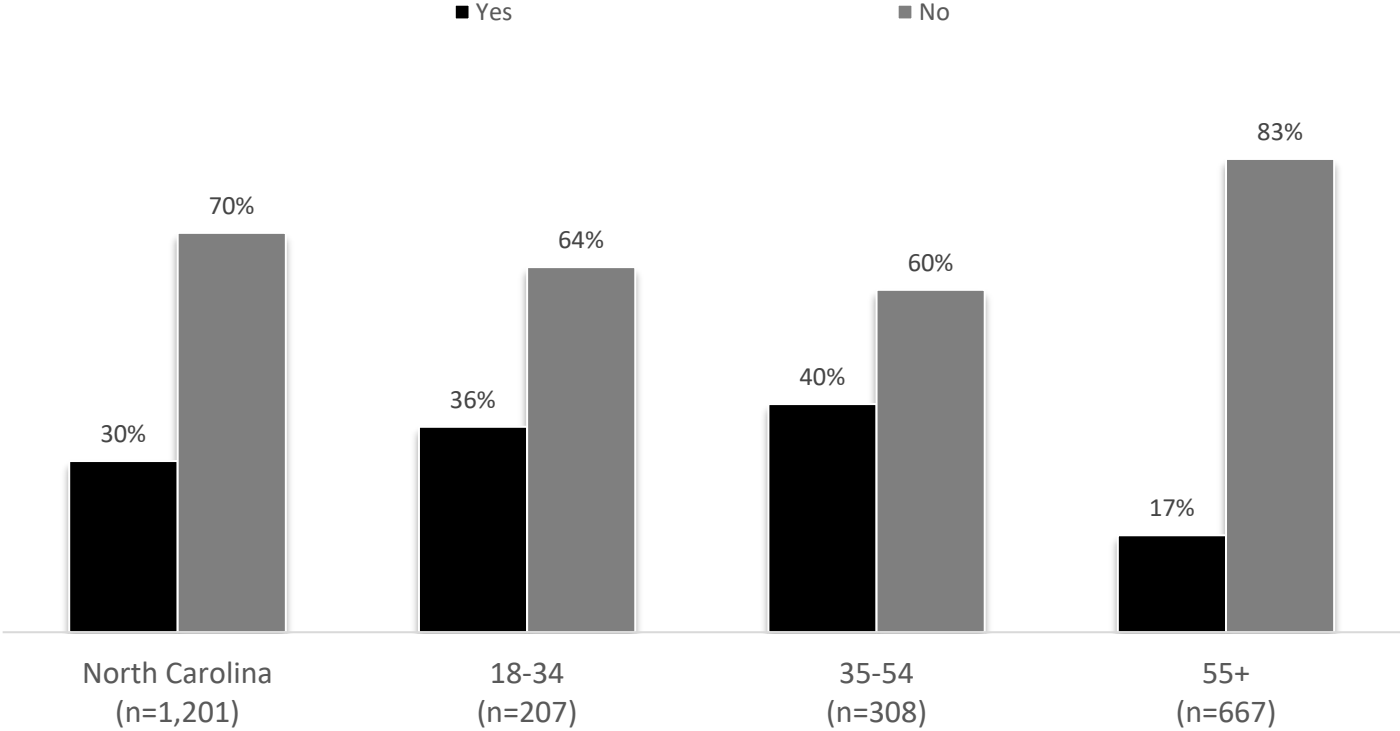
Q6a: Since March 1, 2020, have you taken any of the following types of trips? (Question added W2)

Seven in Ten Residents Do Not Have An Overnight Trip Within North Carolina Planned by December 31, 2020



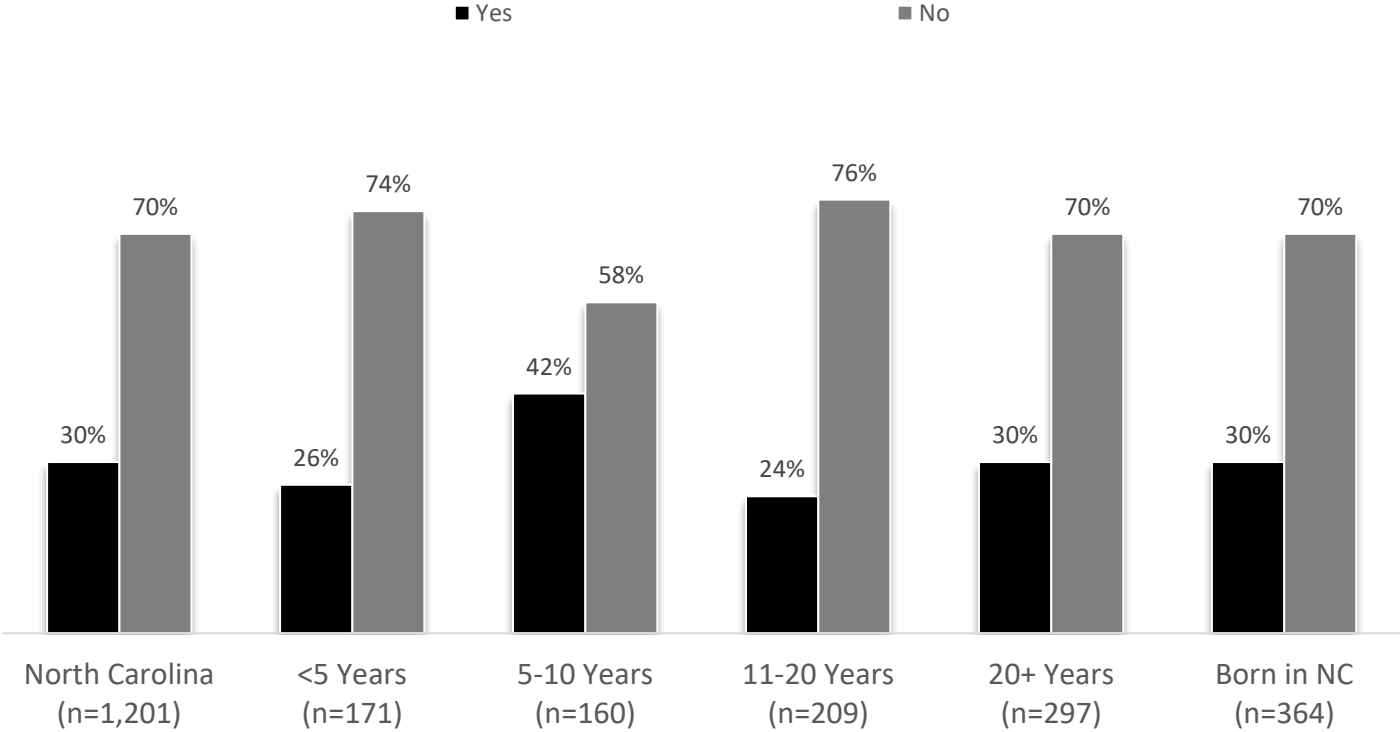
Q7a: Do you currently have an overnight trip within North Carolina planned between now and December 31, 2020? (Question added W2)

Younger Residents are More Likely to Travel Within North Carolina by December 31, 2020



Q7a: Do you currently have an overnight trip within North Carolina planned between now and December 31, 2020? (Question added W2)

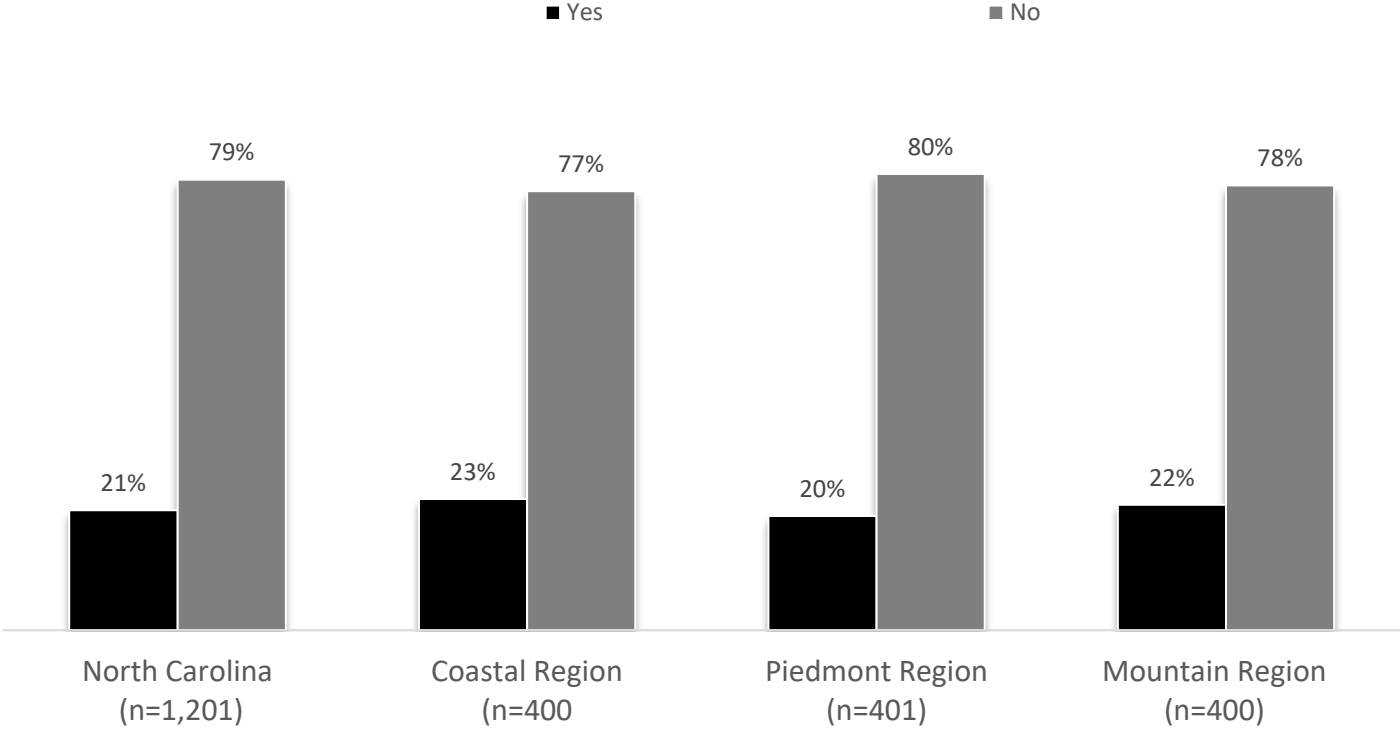
Those Who Have Lived in North Carolina 5-10 Years Most Likely to Travel Within North Carolina by December 31, 2020



Q7a: Do you currently have an overnight trip within North Carolina planned between now and December 31, 2020? (Question added W2)

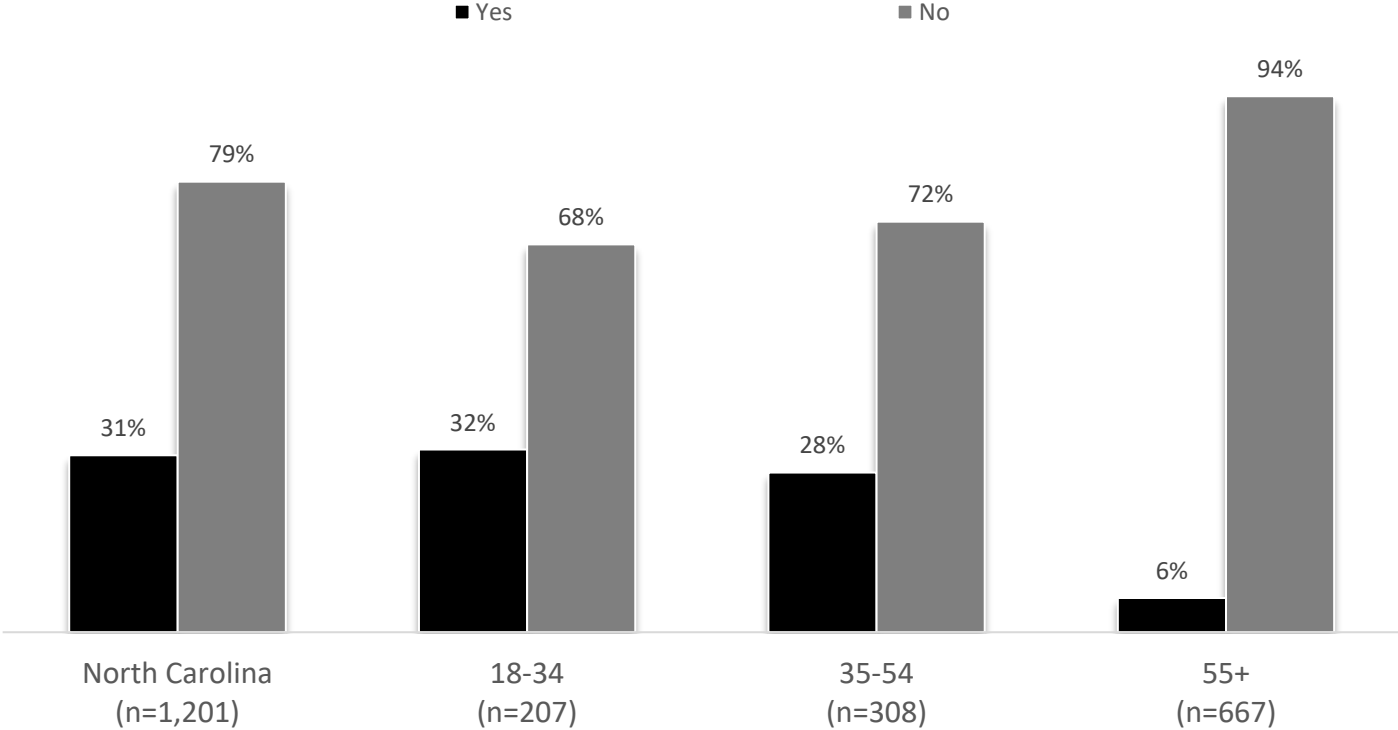
Count On Me NC

A Majority of Residents Have Not Heard of the *Count On Me NC* Health Safety Campaign



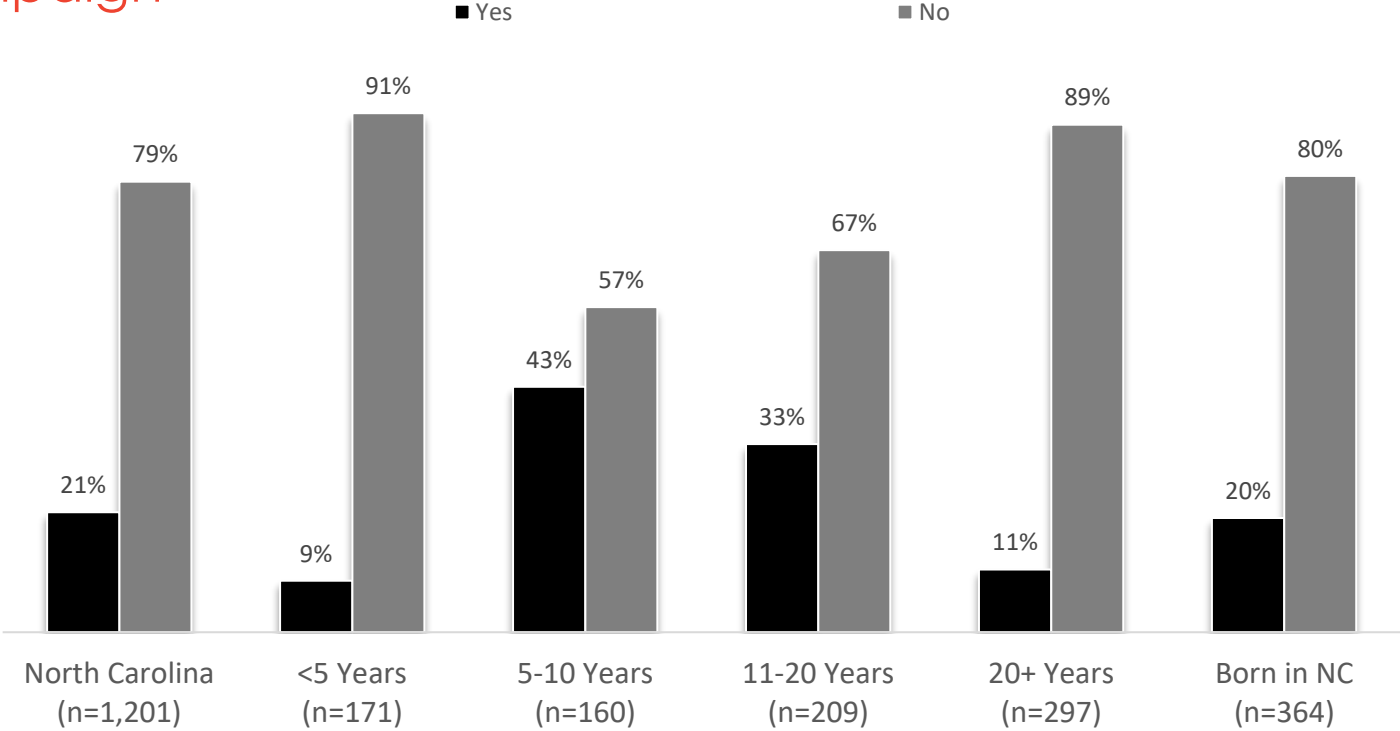
Q8a: Are you aware of the *Count On Me NC* health safety campaign? (Question added W2)

Less Than 10% of Residents Over 55 Years of Age Have Heard of the *Count On Me NC* Health Safety Campaign



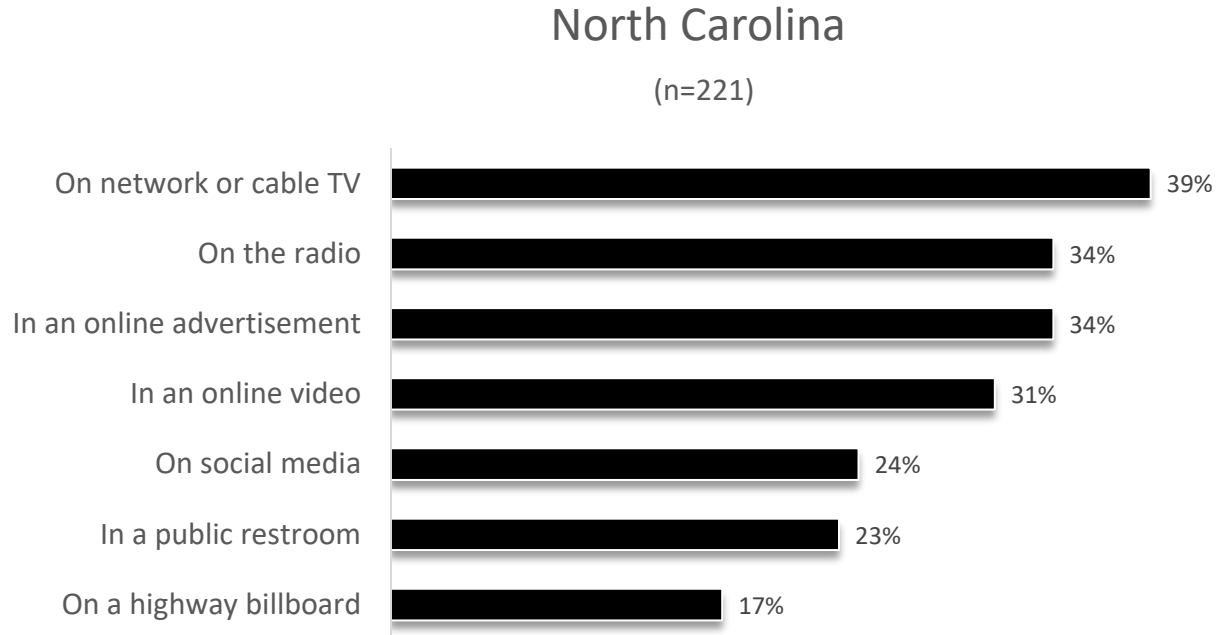
Q8a: Are you aware of the *Count On Me NC* health safety campaign? (Question added W2)

Those Who Have Lived in North Carolina Less Than 5 Years are the Least Likely to Have Heard of the *Count On Me NC* Health Safety Campaign



Q8a: Are you aware of the *Count On Me NC* health safety campaign? (Question added W2)

Four in 10 of Those Aware of the *Count On Me NC* Health Safety Advertising Saw it on TV



Q8b: Where have you seen *Count On Me NC* health safety advertising? Based on those aware of advertising (Question added W2)

The Count On Me NC Health Safety Advertising was Viewed as Effective Among Those Who Where Aware of the Advertising

North Carolina
(n=221)

Wave 2
Difference
Score



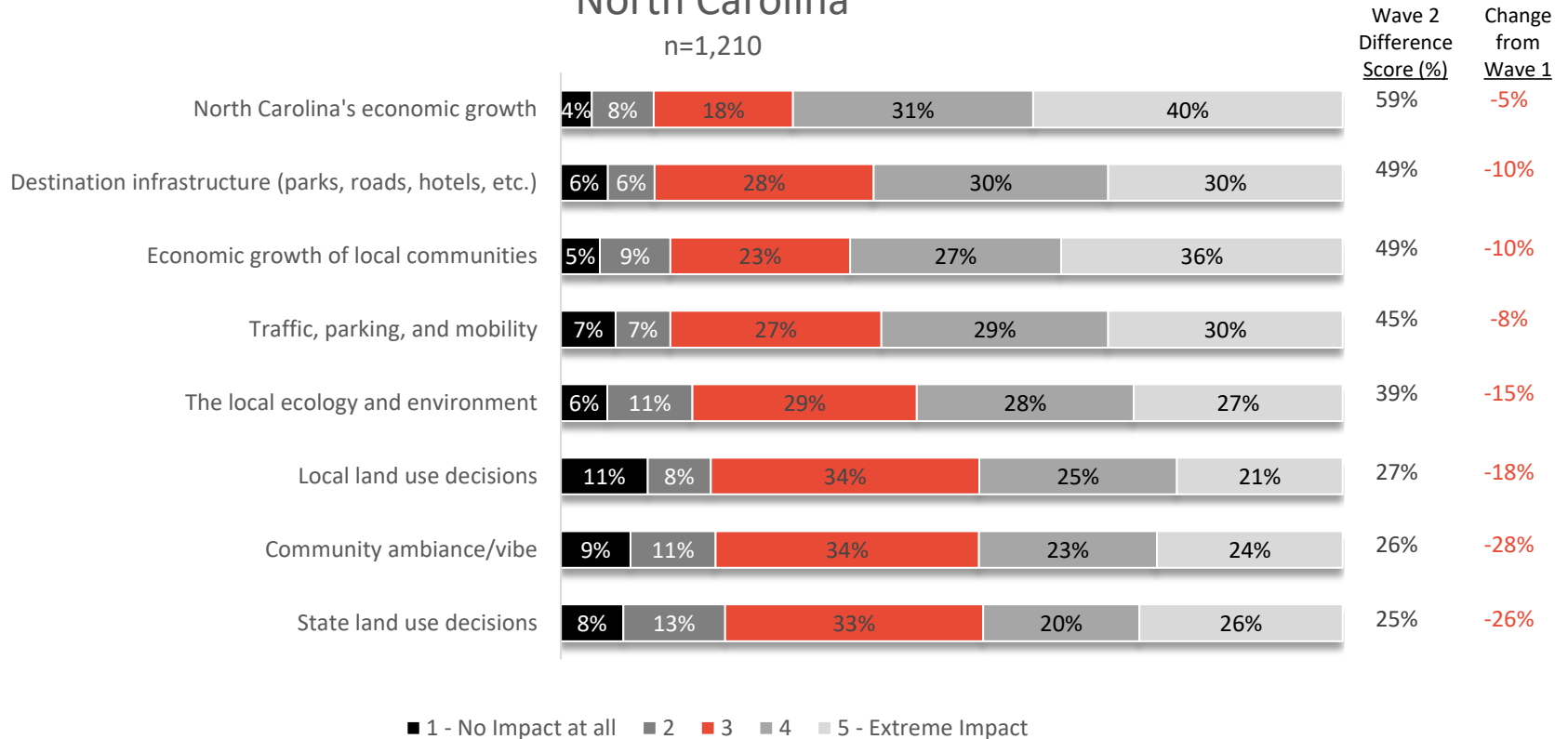
Q9a: Using a scale of 1 (not at all effective) to 5 (extremely effective), please provide a rating of how effective you think the *Count On Me NC* advertising you have see is at each of the following? (Question added W2)



Impact of Tourism

Residents Feel Tourism Has Most Impact on State and Local Economic Growth as well as Destination Infrastructure

North Carolina n=1,210



Q14: Using a scale of 1 (no impact at all) to 5 (extreme impact), please indicate how much impact you think tourism has on each of the following.

The Older Residents Get, the More They Think Tourism Has an Impact on Economic Growth and Infrastructure

North Carolina Difference Scores (%)

	18-34 n=207	35-54 n=308	55+ n=667
North Carolina's economic growth	45	56	71
Economic growth of local communities	29	44	67
Destination infrastructure (parks, roads, hotels, etc.)	23	52	68
Community ambiance/vibe	4	37	35
The local ecology and environment	26	41	48
Traffic, parking, and mobility	31	49	53
State land use decisions	8	19	42
Local land use decisions	10	24	41

Q14: Using a scale of 1 (no impact at all) to 5 (extreme impact), please indicate how much impact you think tourism has on each of the following.

Those Who Have Lived in North Carolina the for the Shortest Time Think Tourism Has the Least Impact on the State

North Carolina Difference Scores (%)

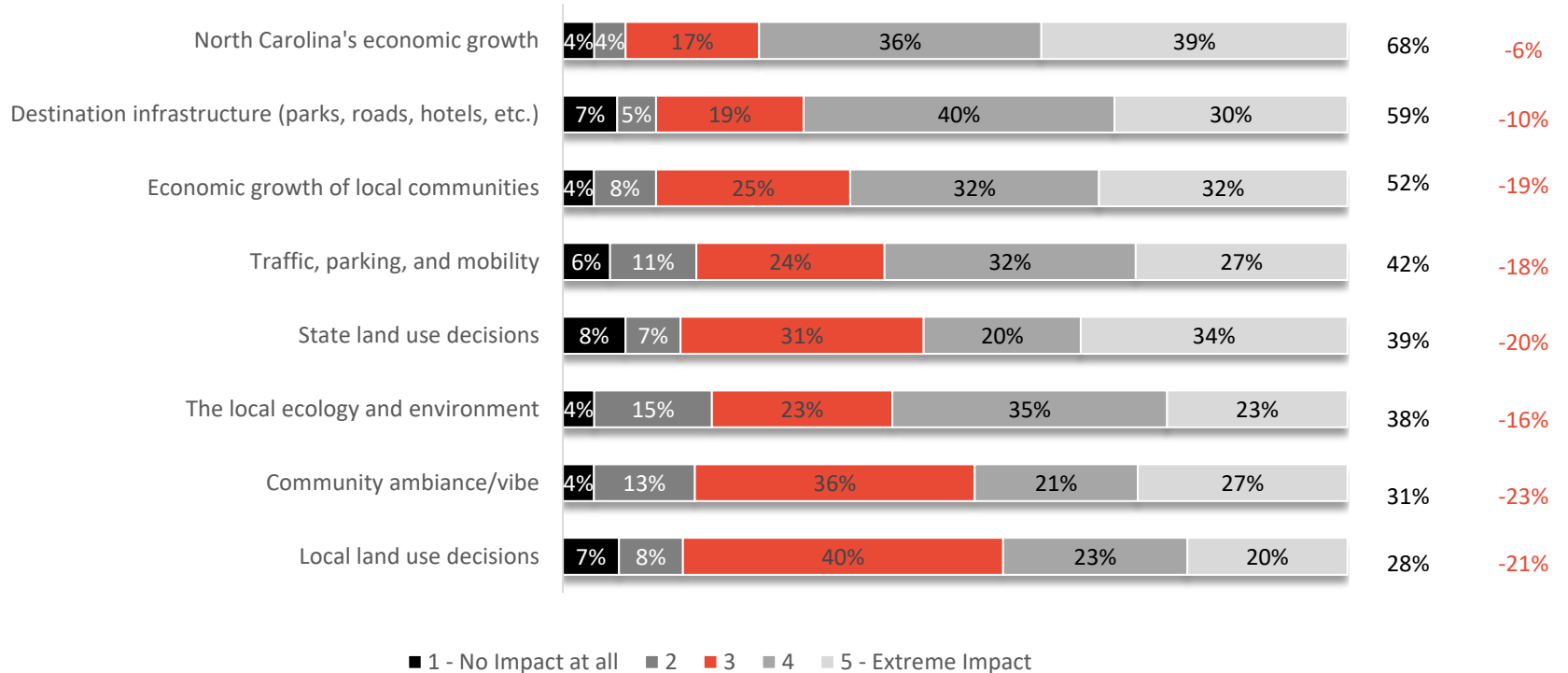
	<5 Years n=171	5-10 Years n=160	11-20 Years n=209	20+ Years n=297	Born in NC n=364
North Carolina's economic growth	53	60	66	58	59
Economic growth of local communities	20	60	60	58	44
Destination infrastructure (parks, roads, hotels, etc.)	12	65	63	55	48
Community ambiance/vibe	-17	26	29	41	30
The local ecology and environment	12	38	34	49	44
Traffic, parking, and mobility	34	65	48	46	41
State land use decisions	-16	24	41	35	28
Local land use decisions	--	27	30	42	24

Q14: Using a scale of 1 (no impact at all) to 5 (extreme impact), please indicate how much impact you think tourism has on each of the following.

Perceived Impact of Tourism

Coastal Region n=400

Wave 2
Difference
Score
Change
from
Wave 1

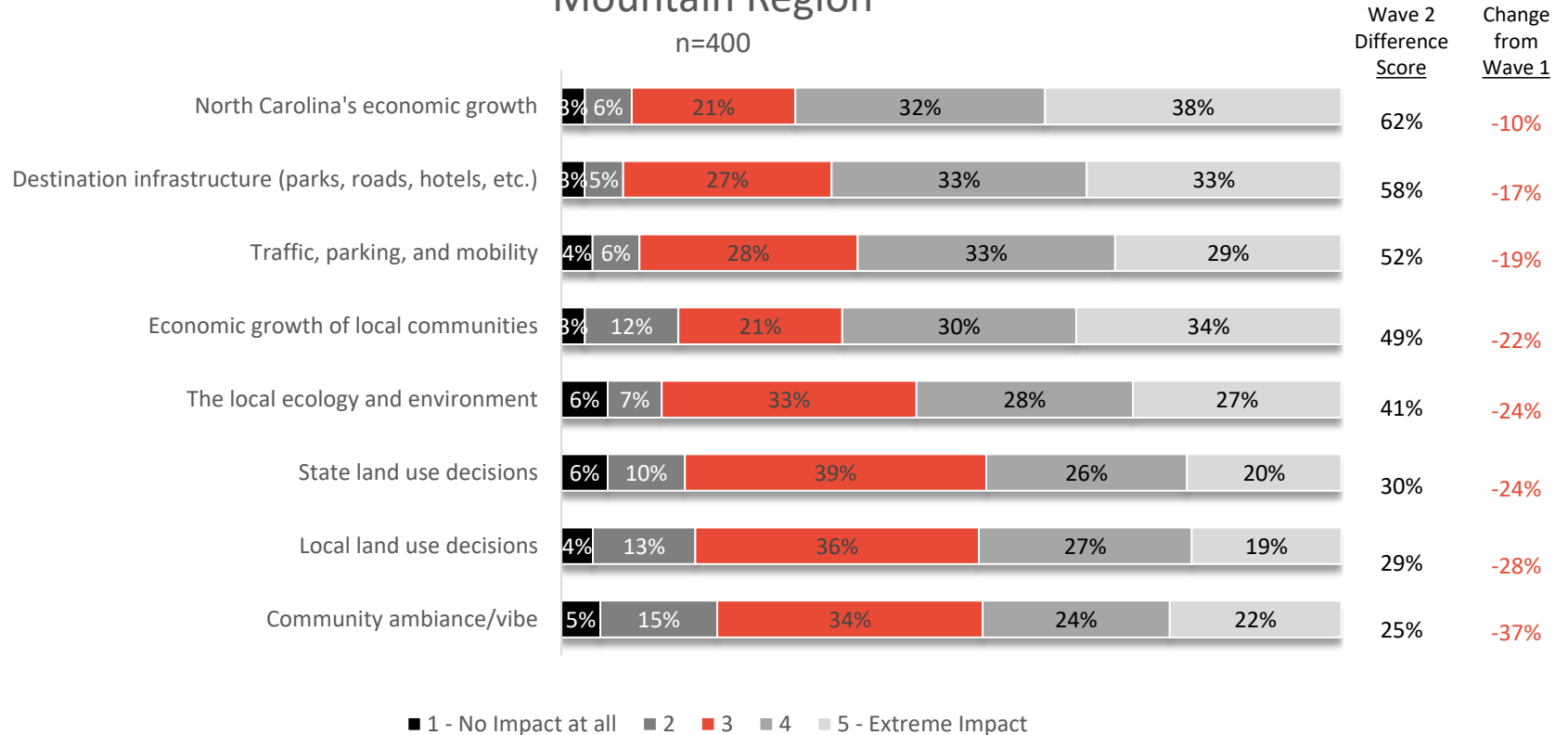


Q14: Using a scale of 1 (no impact at all) to 5 (extreme impact), please indicate how much impact you think tourism has on each of the following.

Perceived Impact of Tourism

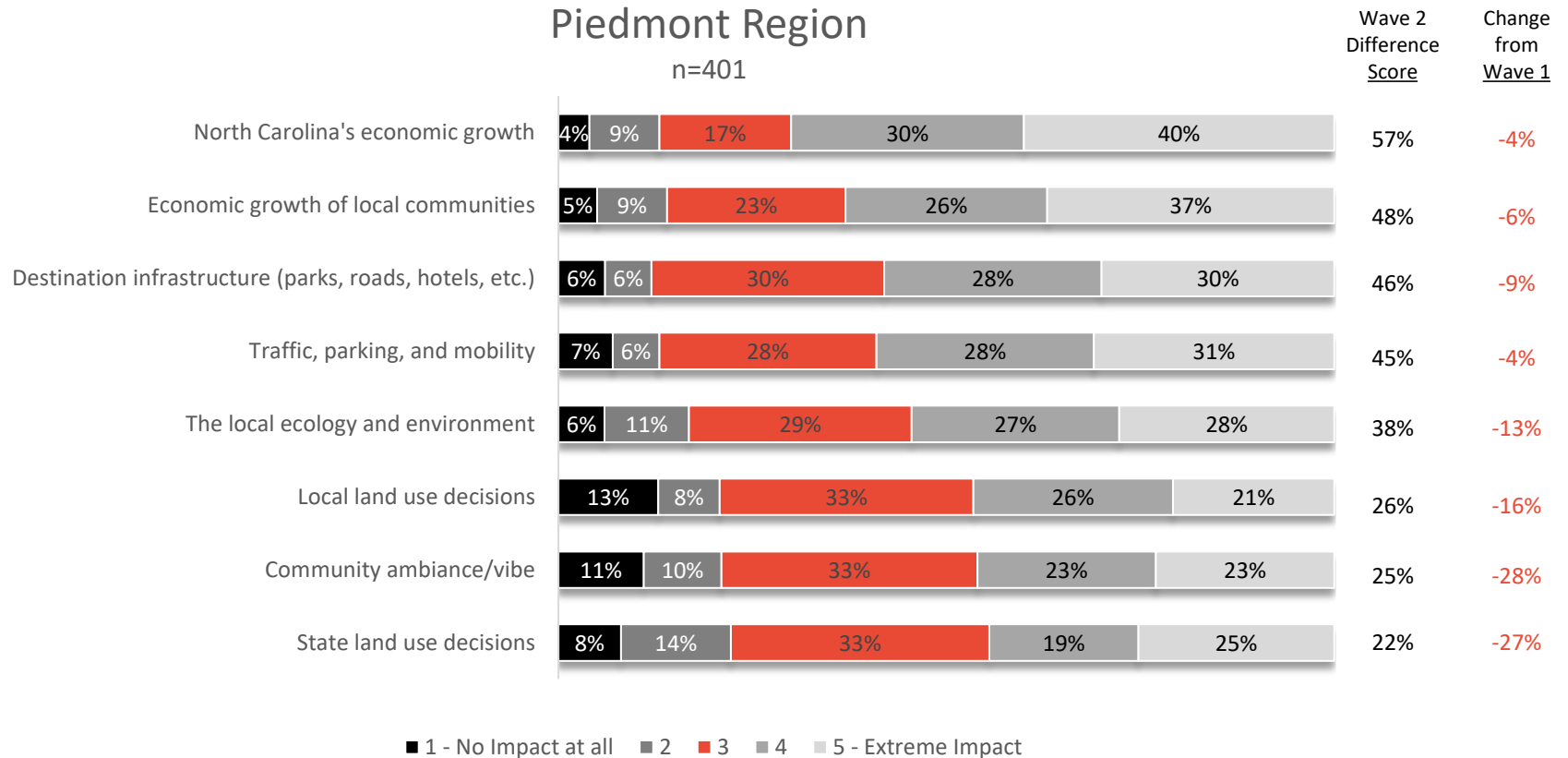
Mountain Region

n=400



Q14: Using a scale of 1 (no impact at all) to 5 (extreme impact), please indicate how much impact you think tourism has on each of the following.

Perceived Impact of Tourism

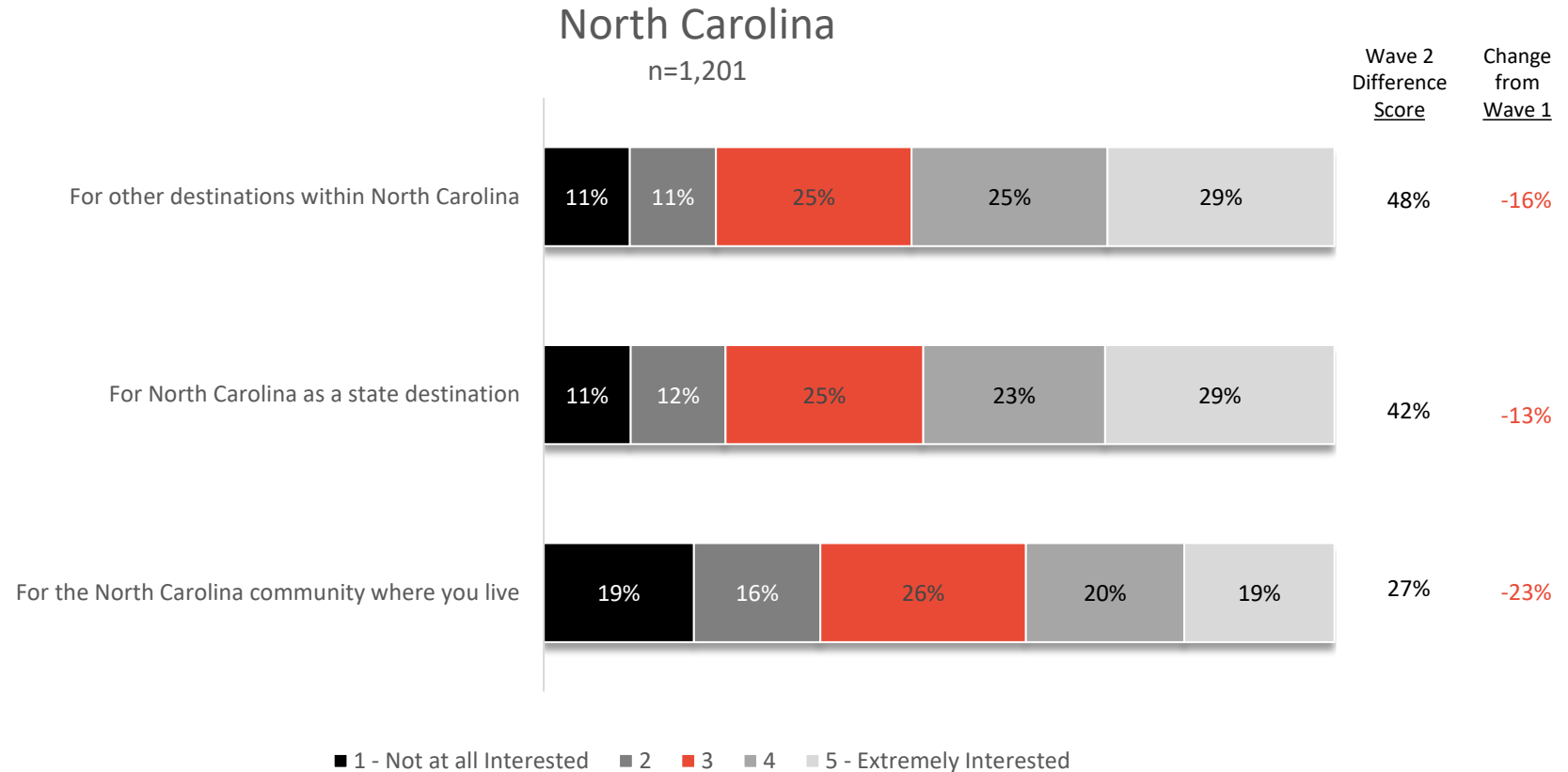


Q14: Using a scale of 1 (no impact at all) to 5 (extreme impact), please indicate how much impact you think tourism has on each of the following.



Destination Marketing

Residents Are Most Interested in Seeing Advertising For Destinations Within North Carolina



Q15: Using a scale of 1 (not at all interested) to 5 (extremely interested), how interested are you to see promotional advertising for North Carolina as a destination or other destinations within North Carolina?

Residents in all Age Groups are Least Interested in Seeing Promotional Advertising for The Communities Where They Live

North Carolina

Difference Scores (%)

	18-34 n=207	35-54 n=308	55+ n=667
For other destinations within North Carolina	31	29	35
For North Carolina as a state destination	8	37	41
For the North Carolina community where you live	-12	8	13

Q15: Using a scale of 1 (not at all interested) to 5 (extremely interested), how interested are you to see promotional advertising for North Carolina as a destination or other destinations within North Carolina?

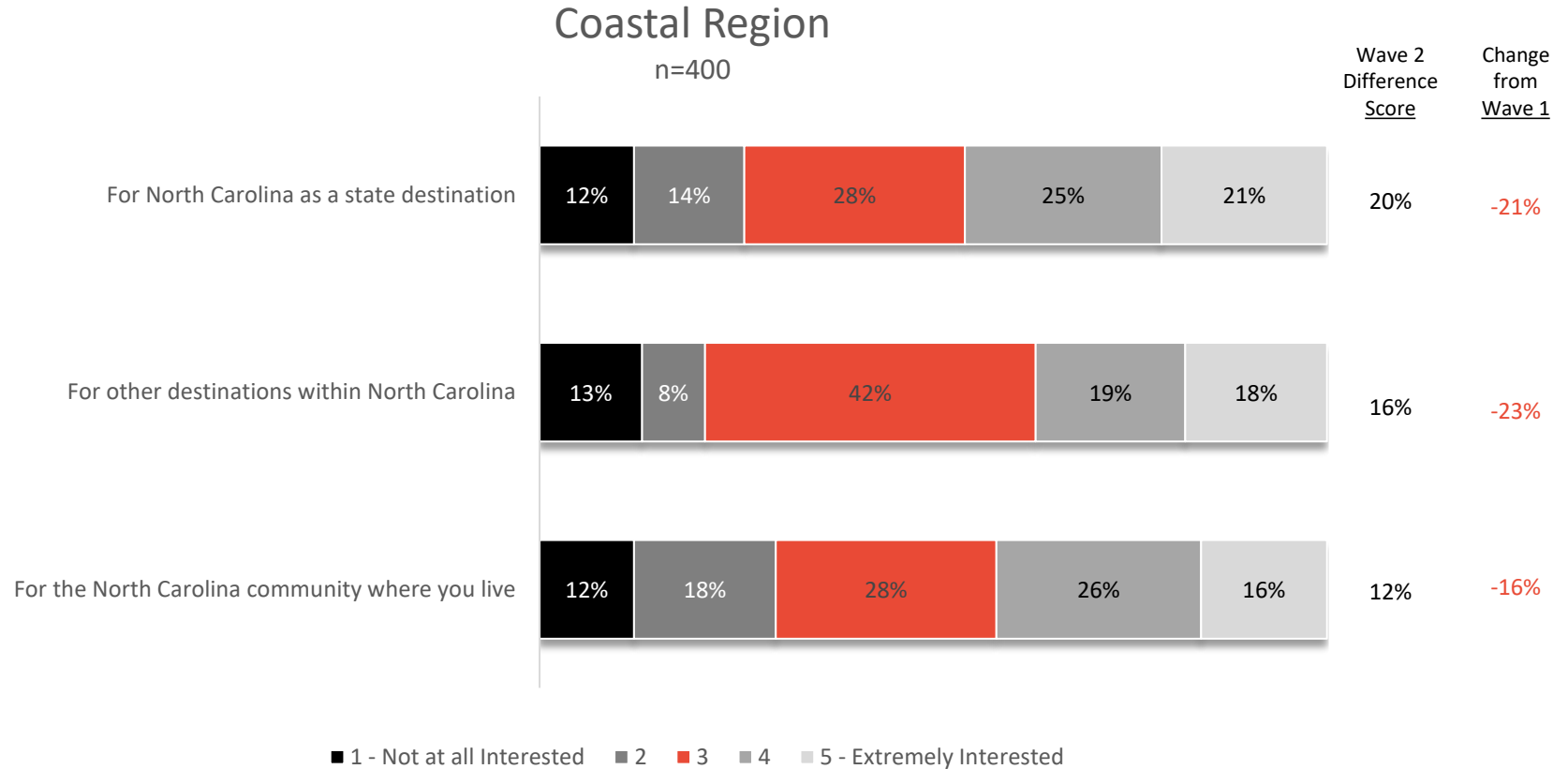
Regardless of Length of Residency, Residents are Least Interested in Seeing Promotional Advertising for the Communities Where They Live

North Carolina Difference Scores (%)

	<5 Years n=171	5-10 Years n=160	11-20 Years n=209	20+ Years n=297	Born in NC n=364
For other destinations within North Carolina	45	36	26	26	32
For North Carolina as a state destination	22	30	14	36	34
For the North Carolina community where you live	-28	23	4	3	12

Q15: Using a scale of 1 (not at all interested) to 5 (extremely interested), how interested are you to see promotional advertising for North Carolina as a destination or other destinations within North Carolina?

Interest in Seeing Promotional Advertising

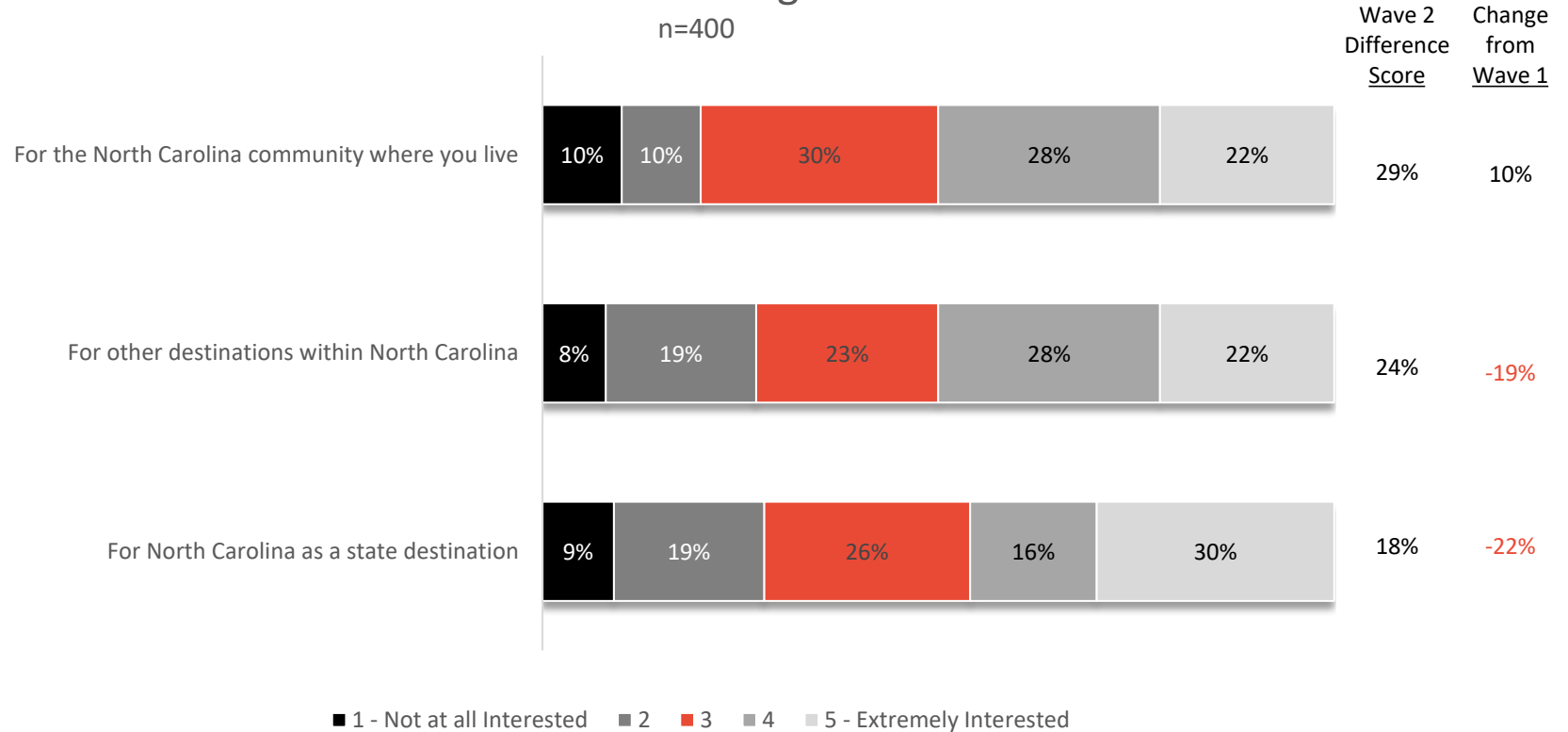


Q15: Using a scale of 1 (not at all interested) to 5 (extremely interested), how interested are you to see promotional advertising for North Carolina as a destination or other destinations within North Carolina?

Interest in Seeing Promotional Advertising

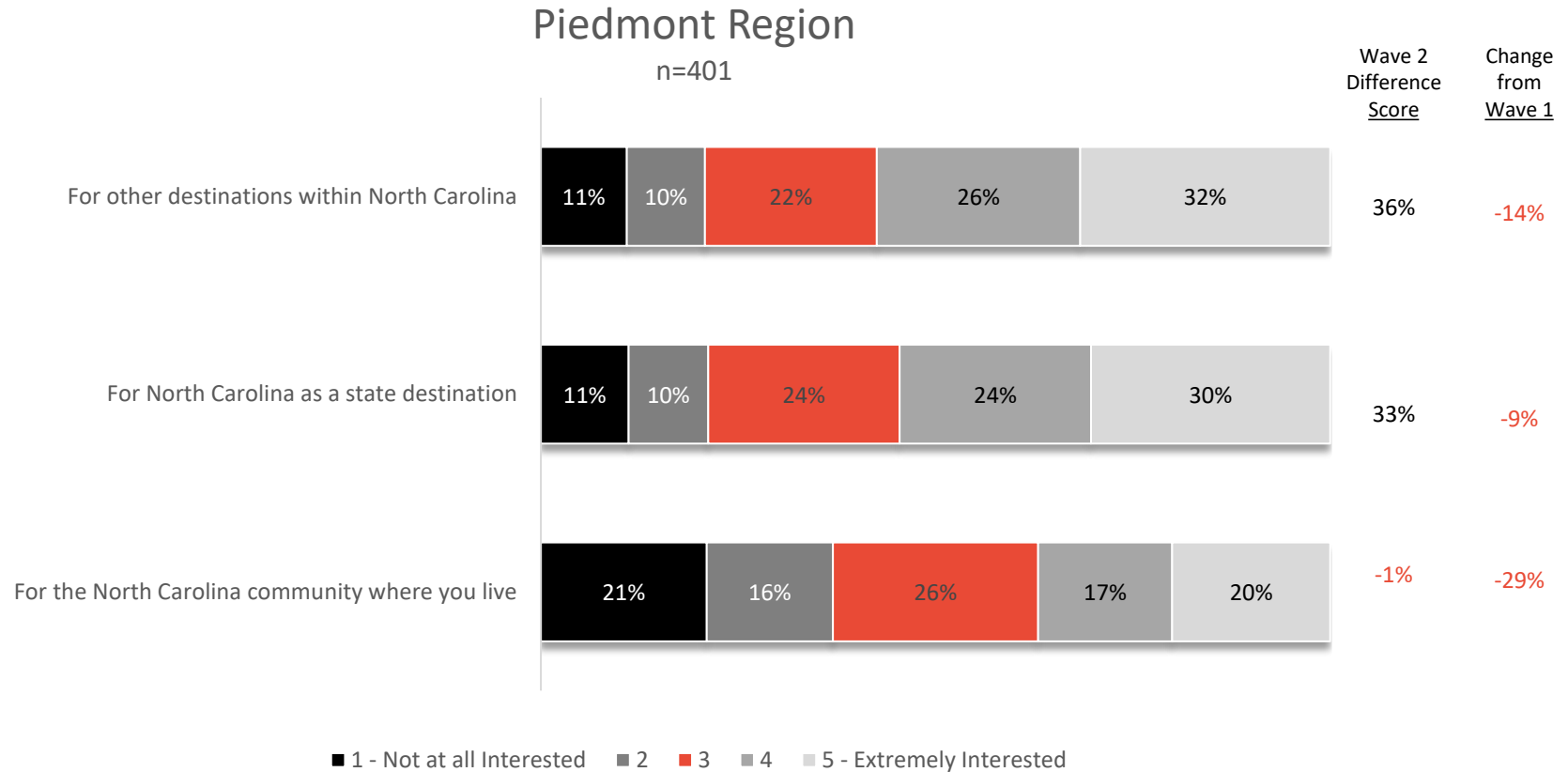
Mountain Region

n=400



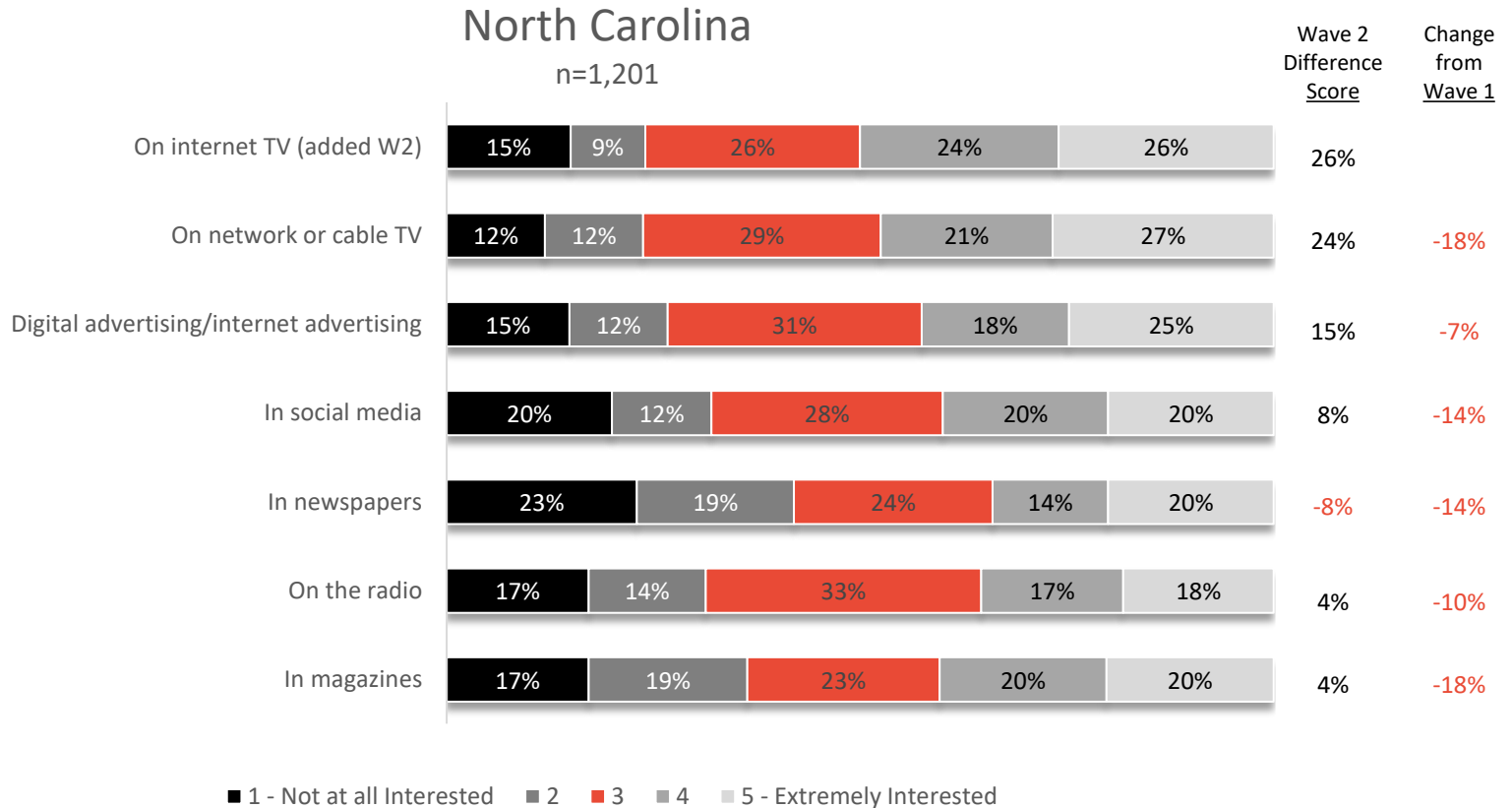
Q15: Using a scale of 1 (not at all interested) to 5 (extremely interested), how interested are you to see promotional advertising for North Carolina as a destination or other destinations within North Carolina?

Interest in Seeing Promotional Advertising



Q15: Using a scale of 1 (not at all interested) to 5 (extremely interested), how interested are you to see promotional advertising for North Carolina as a destination or other destinations within North Carolina?

Residents Would Overwhelmingly Prefer to See Advertising for North Carolina Destinations on TV



Q16: Using a scale of 1 (not at all interested) to 5 (extremely interested), please indicate your level of interest in the type of media you would be interested in seeing promotional advertising for North Carolina as a destination or other destinations within North Carolina.

Even Youngest Residents Are More Interested in Seeing Promotional Advertising on TV Than on Social Media or Digital/Internet

North Carolina Difference Scores (%)

	18-34 n=207	35-54 n=308	55+ n=667
On network or cable TV	31	18	24
On internet TV	39	29	12
Digital advertising/internet advertising	25	25	1
In magazines	-7	7	10
In social media	19	25	-13
On the radio	1	11	--
In newspapers	-21	-1	-2

Q16: Using a scale of 1 (not at all interested) to 5 (extremely interested), please indicate your level of interest in the type of media you would be interested in seeing promotional advertising for North Carolina as a destination or other destinations within North Carolina.

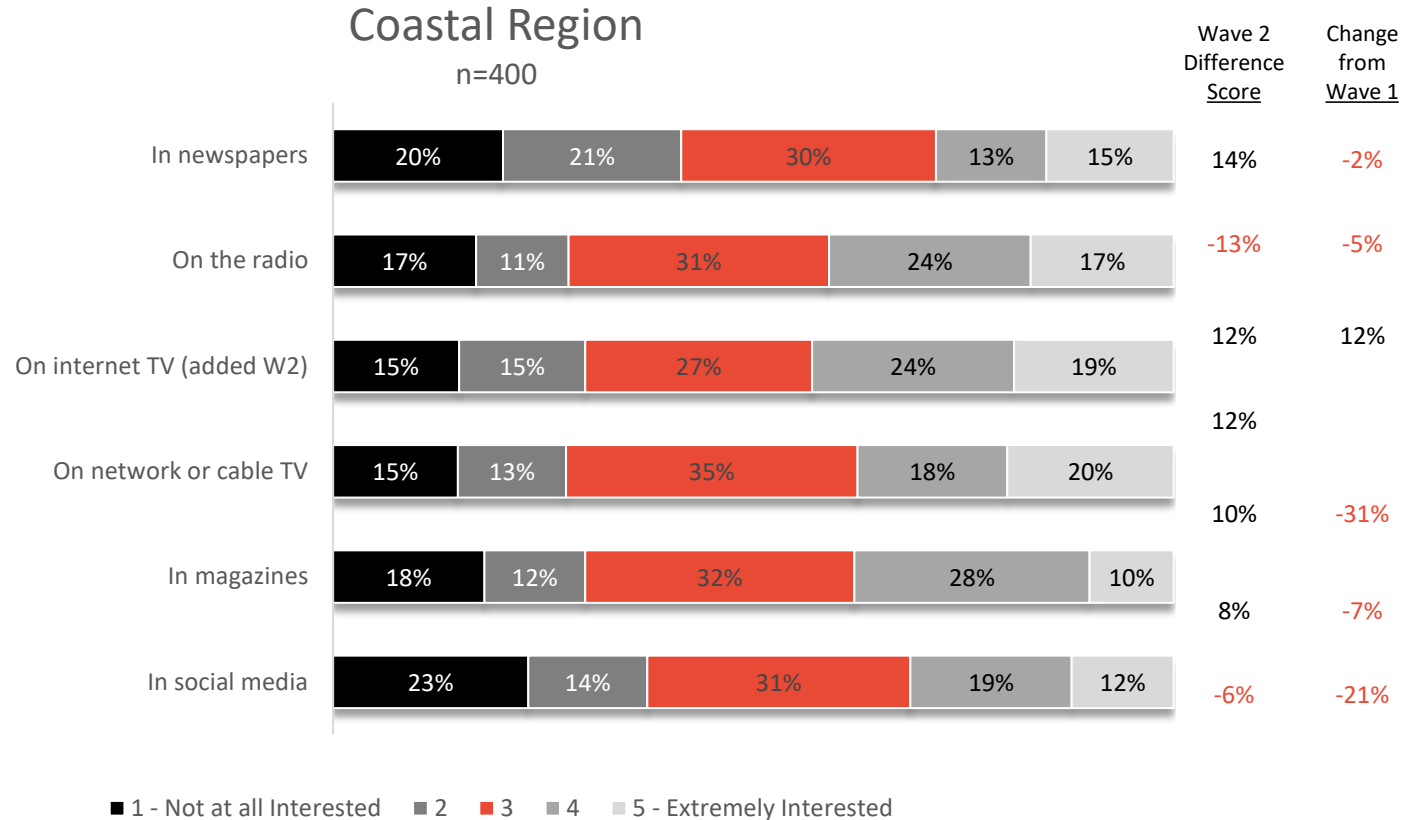
The Least Preferred Media for Promotional Advertising are Newspapers, Regardless of Length of Residency

North Carolina Difference Scores (%)

	<5 Years n=171	5-10 Years n=160	11-20 Years n=209	20+ Years n=297	Born in NC n=354
On network or cable TV	32	26	14	21	28
On internet TV	31	33	24	20	27
Digital advertising/internet advertising	30	-1	14	12	19
In magazines	-25	27	-5	-1	15
In social media	4	28	-4	-7	19
On the radio	-10	6	-5	4	12
In newspapers	-45	13	-18	-11	6

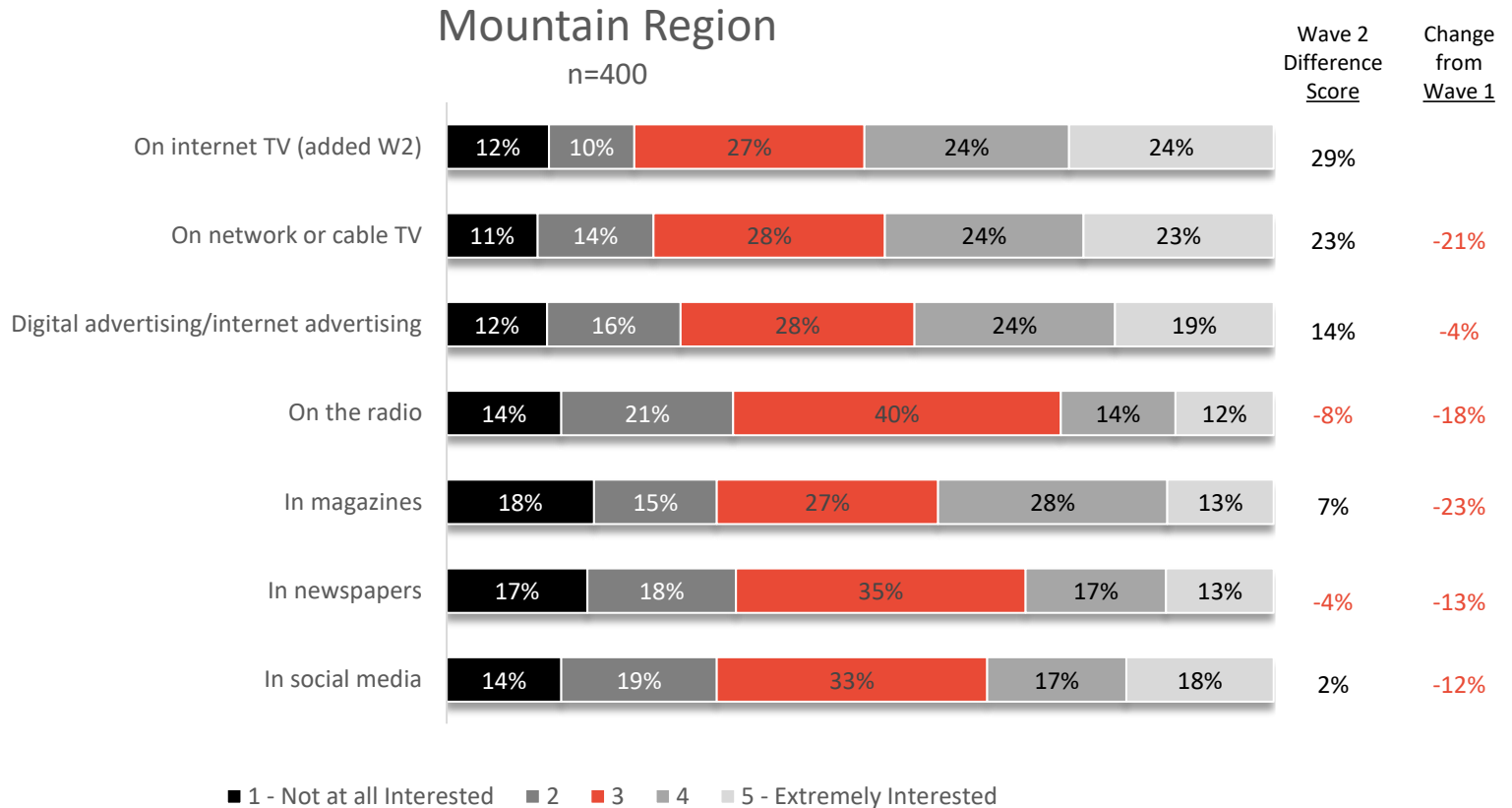
Q16: Using a scale of 1 (not at all interested) to 5 (extremely interested), please indicate your level of interest in the type of media you would be interested in seeing promotional advertising for North Carolina as a destination or other destinations within North Carolina.

Interest in Media Type for Promotional Advertising



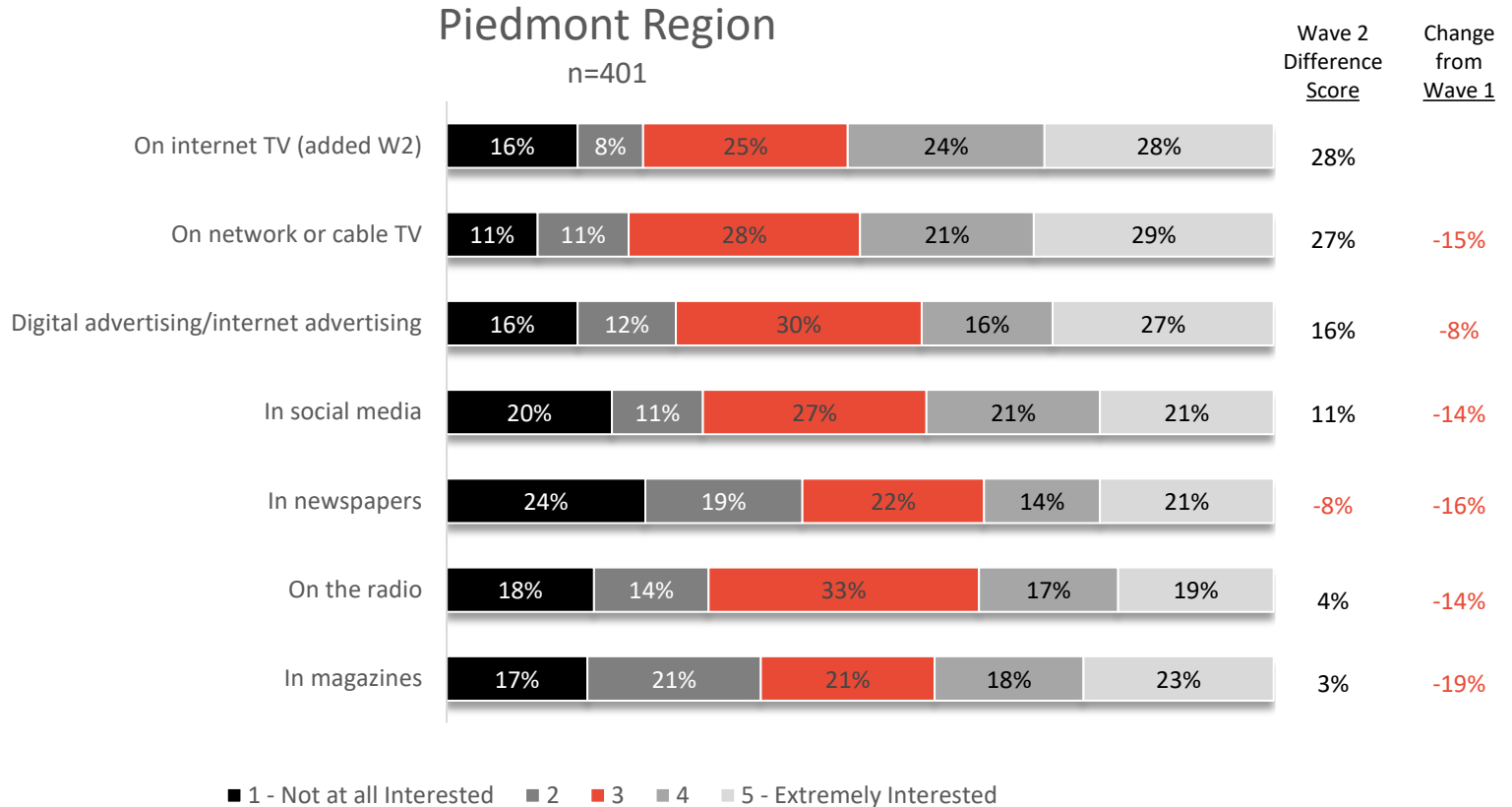
Q16: Using a scale of 1 (not at all interested) to 5 (extremely interested), please indicate your level of interest in the type of media you would be interested in seeing promotional advertising for North Carolina as a destination or other destinations within North Carolina.

Interest in Media Type for Promotional Advertising



Q16: Using a scale of 1 (not at all interested) to 5 (extremely interested), please indicate your level of interest in the type of media you would be interested in seeing promotional advertising for North Carolina as a destination or other destinations within North Carolina.

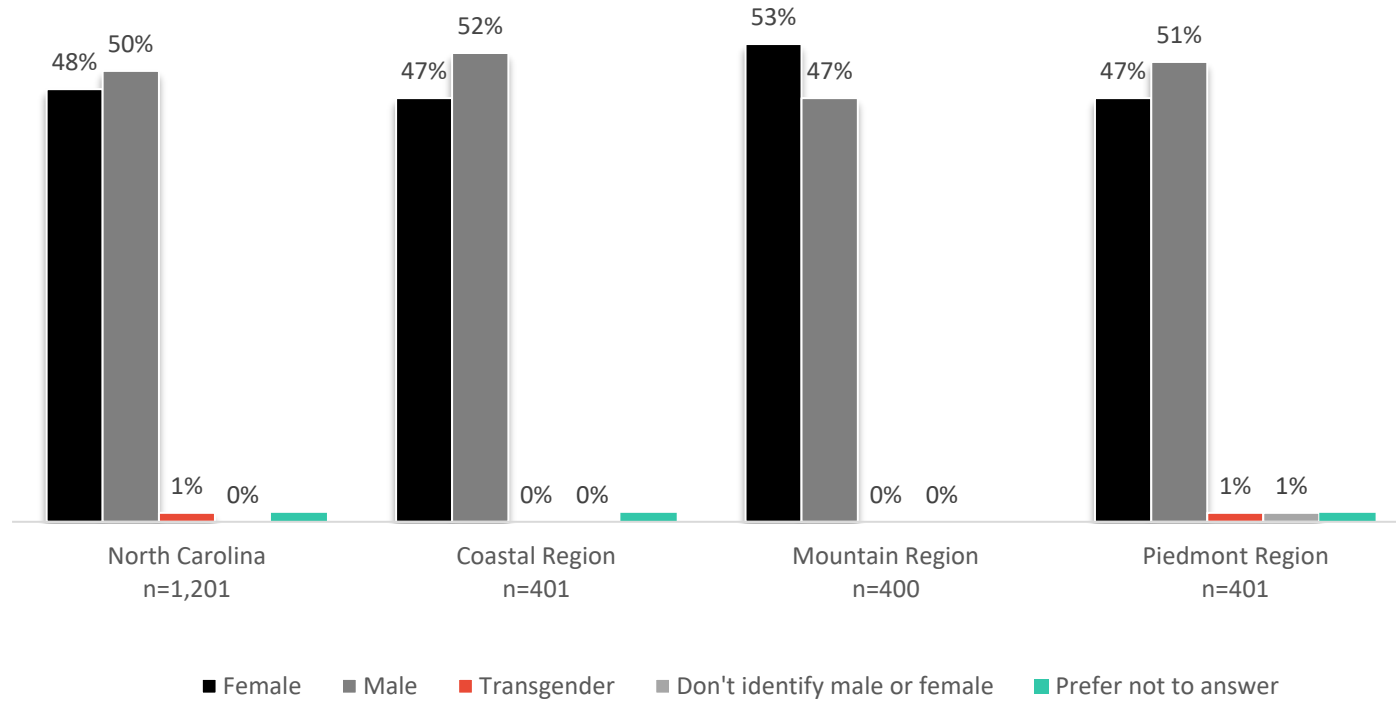
Interest in Media Type for Promotional Advertising



Q16: Using a scale of 1 (not at all interested) to 5 (extremely interested), please indicate your level of interest in the type of media you would be interested in seeing promotional advertising for North Carolina as a destination or other destinations within North Carolina.

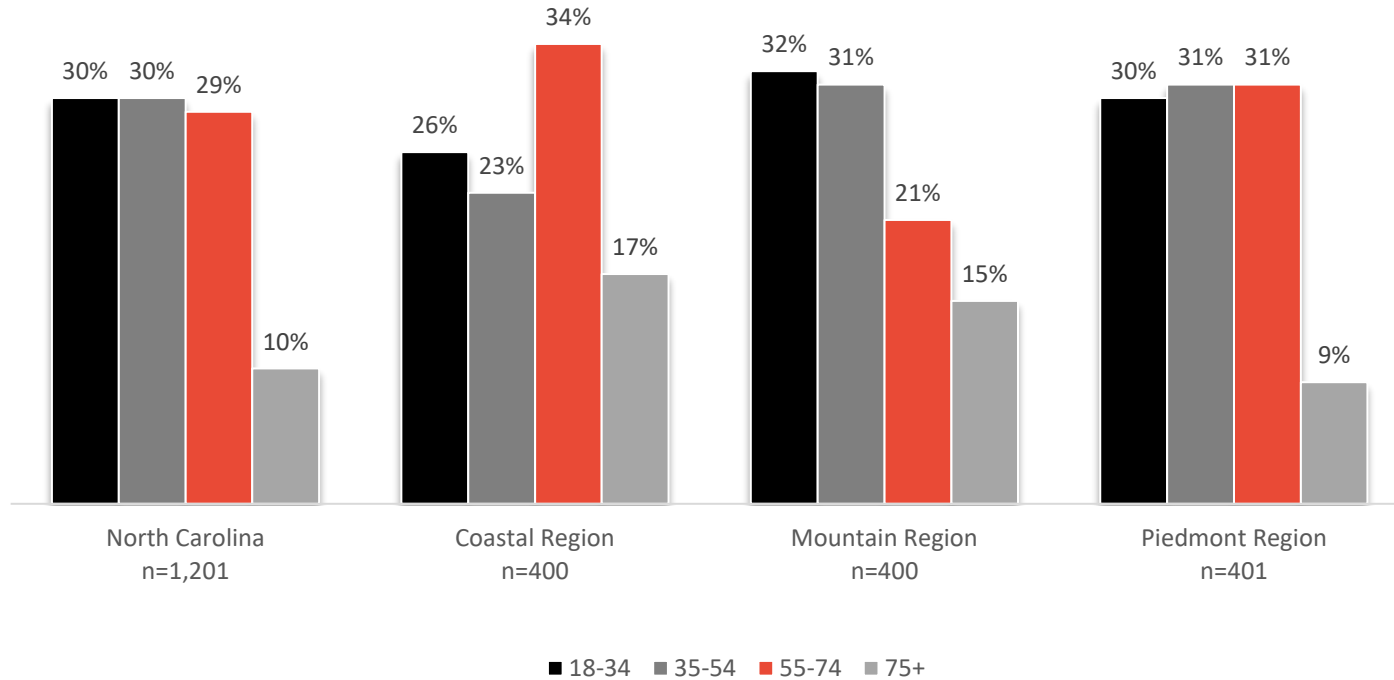
Demographics

Gender



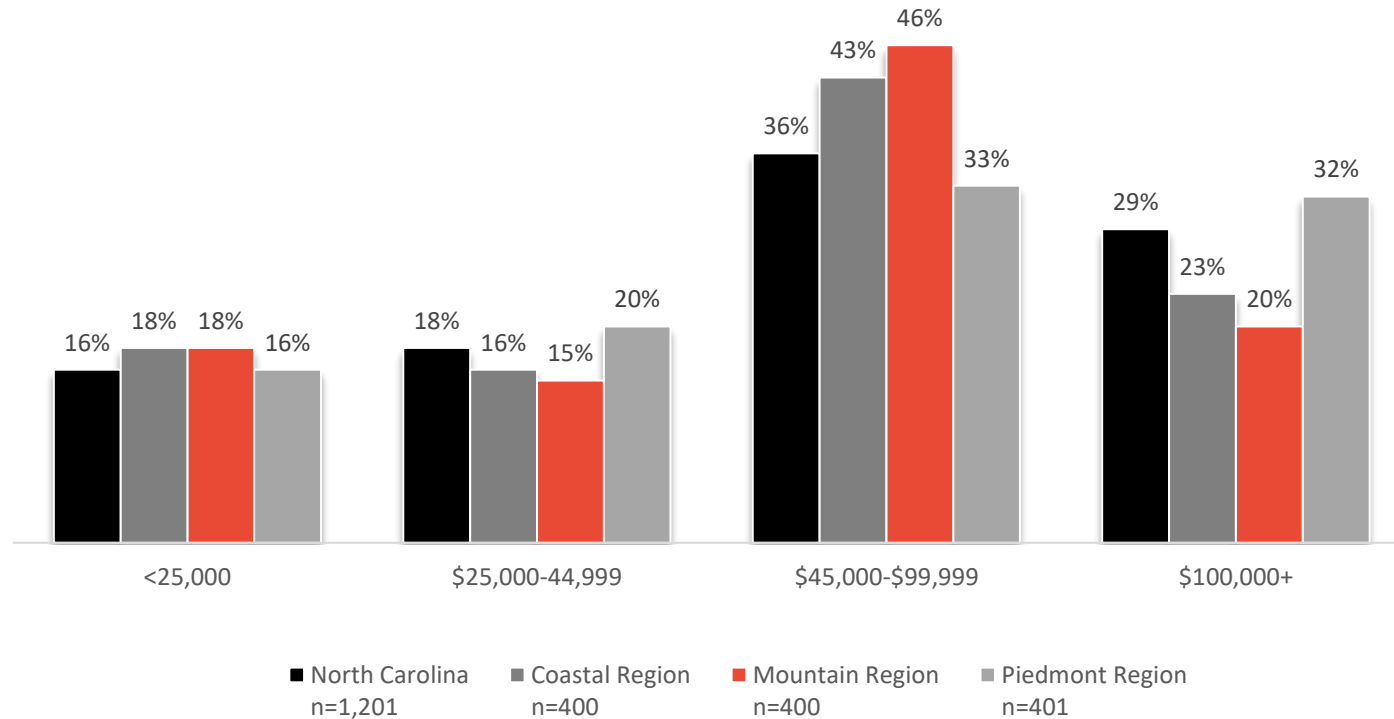
Q: How do you identify yourself?

Age



Q: Which of the following categories includes your age?

Household Income

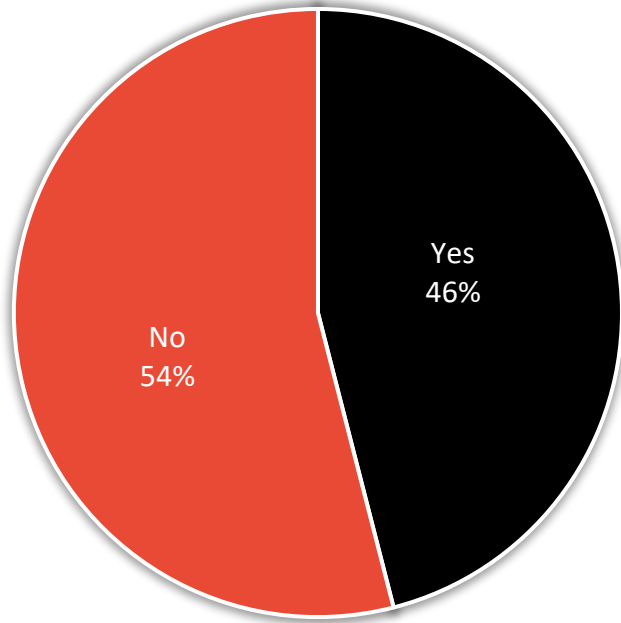


Q: What is your annual household income?

Children in Household

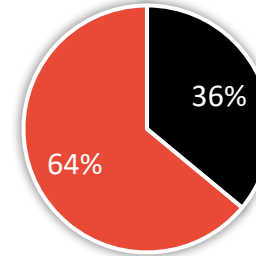
North Carolina

N=1,201



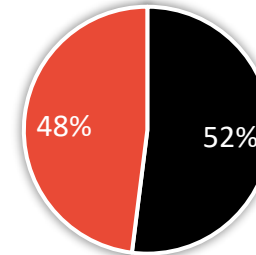
Coastal Region

n=400



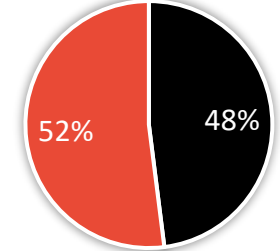
Piedmont Region

n=401



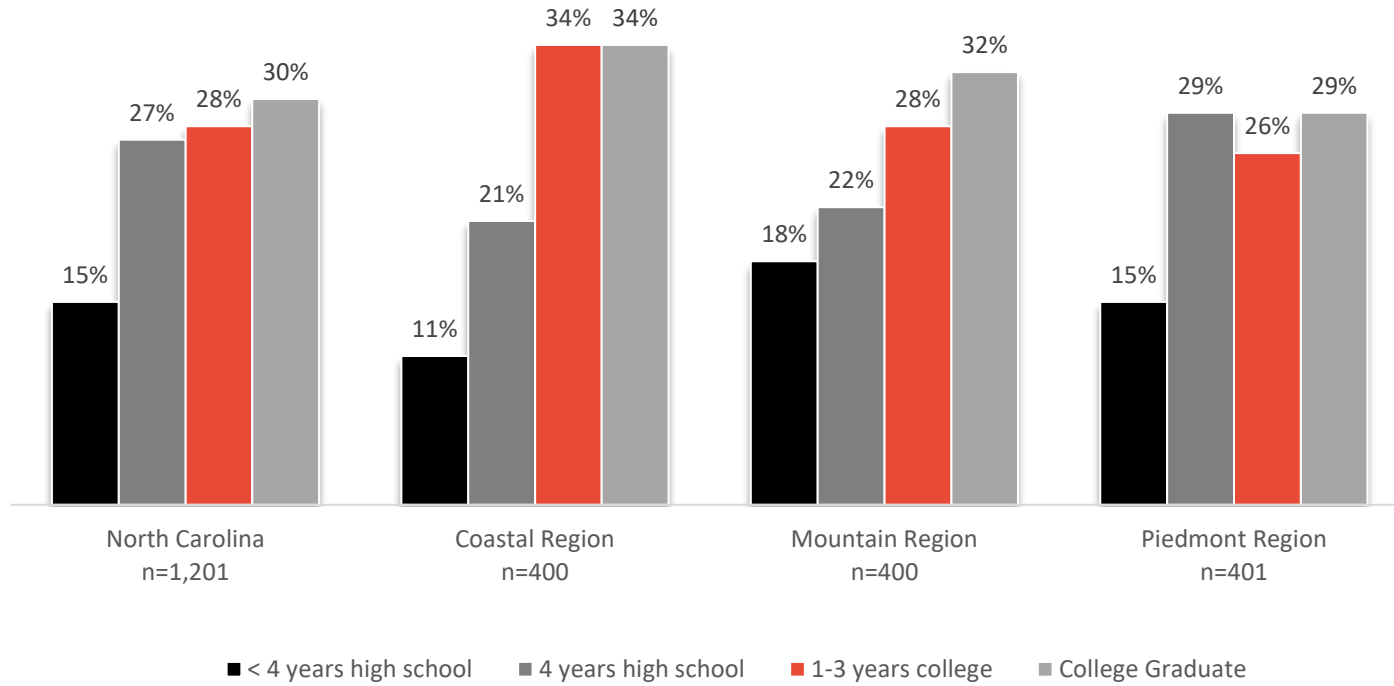
Mountain Region

n=400



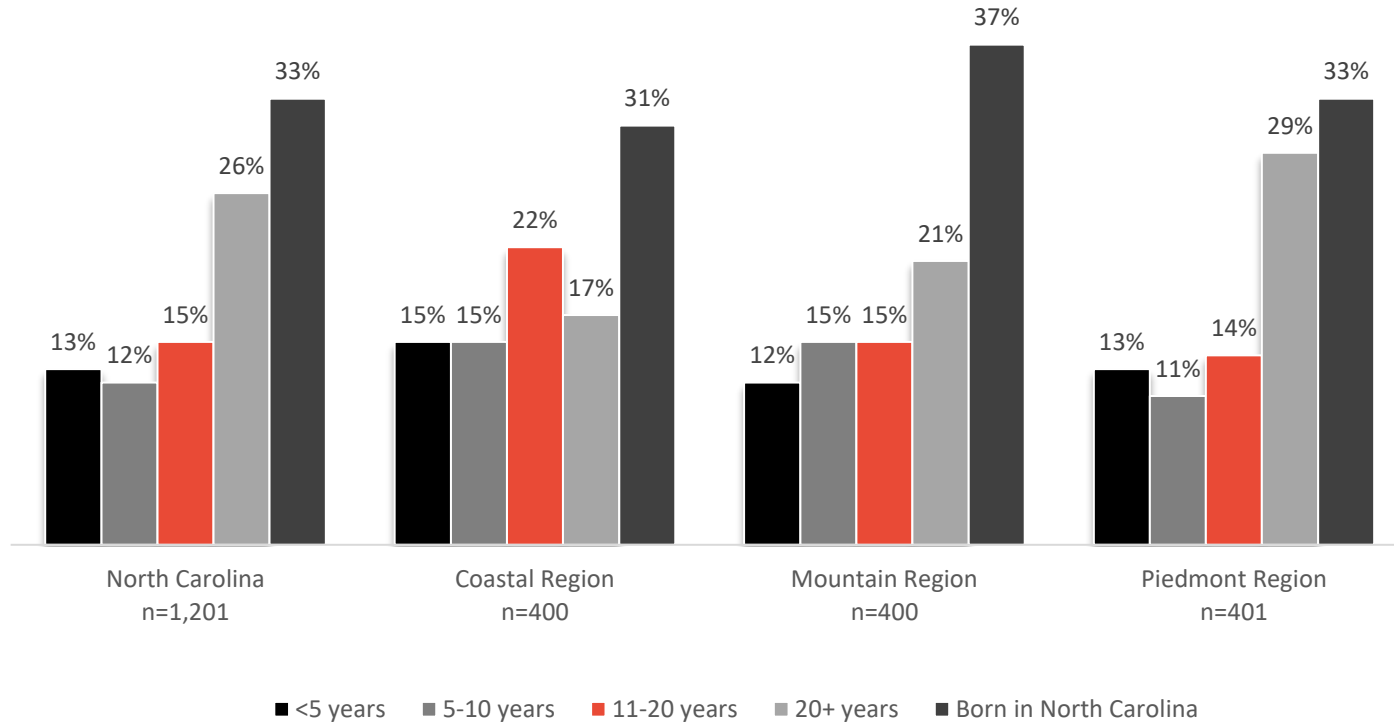
Q: Do you currently have children 18 years of age or younger living in your household?

Education



Q: What is the highest level of education you completed?

North Carolina Residency



Q: How long have you been a resident of North Carolina?

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