

WAVE III - DECEMBER 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 III of the study.

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 November 30 and December 10, 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 third wave of this study, as cases of COVID-19 continue to increase, North Carolina resident attitudes remain steadfast. 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 interest in traveling within the state has not declined. Residents are still most likely to take road trips to open-air destinations such as North Carolina's mountains. However, the eminent availability of a vaccine, may be contributing to residents' willingness to consider a few more travel options during the next six months. Interest in taking more day trips and visiting state parks also increased among Wave III respondents. Residents, while still hesitant, are becoming more interested in visiting a North Carolina City or Metropolitan area as well as a North Carolina restaurant.

One in four North Carolina residents have heard of the Count On Me NC health safety campaign. Younger (18-34) residents were much more likely to have heard of the campaign than older residents. And those that had heard of it heard it on the radio and found it particularly effective in providing assurance that health safety precautions are being implemented in North Carolina.



/ Key Findings

- / North Carolina residents remain committed to wearing masks. Three in five residents state they wear face masks whenever they leave the house and 70% say they wear a mask to indoor events and activities, which is a 9% increase over Wave II. In this third 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.
- / Compared to Wave II, North Carolina residents have gained trust in official agencies (CDC, Local health department and State government health agencies to provide COVID-19 safety information. They are relying less on friends and family for this type of information. The CDC is about even with local health departments as a trustworthy source for COVID-19 safety information.
- / 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 continue to expect the use of face masks to be the most essential safety protocol for when traveling after COVID-19. Hand washing and social distancing are also very important, but it is clear, that requiring face masks will be essential 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. They will likely take more day trips and make visits to North Carolina state parks.
- / When asked how COVID-19 has impacted interest in various types of air and auto travel, North Carolina residents' have the most interest in taking road trips, particularly to mountain destinations. More than 45% are less interested in taking any type of trip by air.
- / Almost one in four residents are more interested in taking overnight trips within North Carolina than they were before COVID-19. Less than 20% are more interested in travel to any other nearby states.
- / Although there is interest in traveling within the state, most residents have not done so since March 1, 2020. And about 1 in 5, less than in Wave II, have no plans of taking an overnight trip within the state by December 31, 2020. This is likely due to the increase in COVID-19 cases since Wave II was conducted.

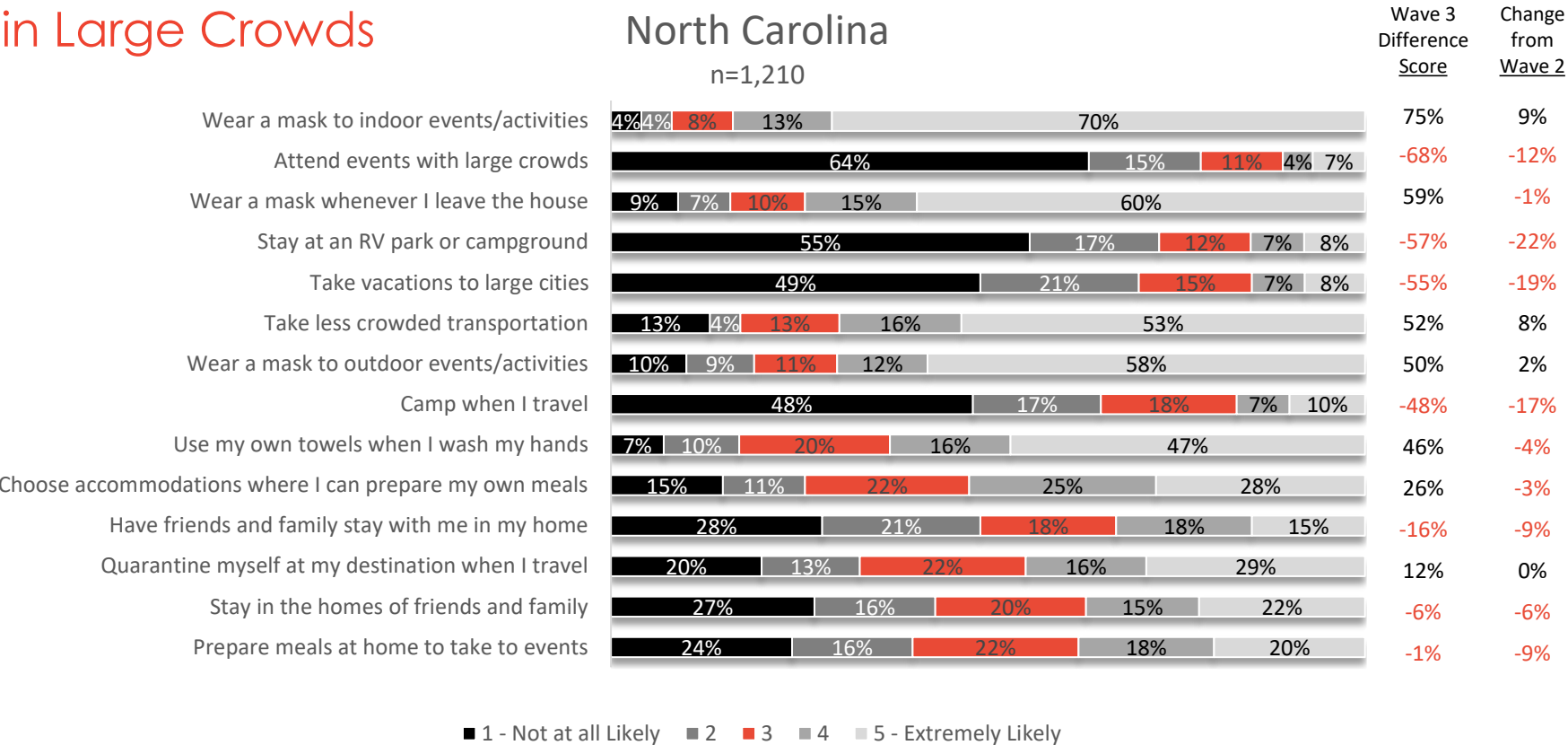


/ Key Findings

- / More residents have heard of the Count On Me NC health safety campaign by the third wave of this study (25% vs. 20% in Wave II). Those who had heard of the campaign most likely heard it on the radio, followed by seeing it on network or cable TV.
- / Although ratings were slightly lower in Wave III, over half of the residents who were aware of the Count On Me NC health safety campaign thought it was quite effective in teaching them about health safety protocols they should use when traveling within North Carolina, providing information on health safety while traveling within North Carolina and providing information useful in training 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, traffic/parking/mobility and on community ambience/vibe.
- / In Wave III, North Carolina's residents are most interested in seeing travel advertising for North Carolina as a state destination. Their most preferred medium is network or cable followed by internet TV and social media.

COVID-19

North Carolina Residents Have Grown More Cautious Since September – More are Likely to Wear Masks and Fewer Want to Be in Large Crowds



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 of All Ages are Committed to Wearing Masks in All Situations

North Carolina Difference Scores (%)

	18-34 n=248	35-54 n=326	55+ n=634
Wear a mask to indoor events/activities	74	65	83
Wear a mask whenever I leave the house	54	57	65
Attend events with large crowds	-57	-57	-85
Use my own towels when I wash my hands	53	46	41
Wear a mask to outdoor events/activities	54	36	59
Take less crowded transportation	60	32	62
Take vacations to large cities	-38	-49	-74
Stay at an RV park or campground	-33	-56	-79
Camp when I travel	-29	-36	-74
Choose accommodations where I can prepare my own meals	45	17	16
Quarantine myself at my destination when I travel	24	18	-2
Prepare meals at home to take to events	16	-8	-9
Have friends and family stay with me in my home	-7	-17	-23
Stay in the homes of friends and family	18	-11	-24

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?

Regardless of Length of Residency, North Carolina Residents Will Wear Masks and Stay Away From Large Crowds

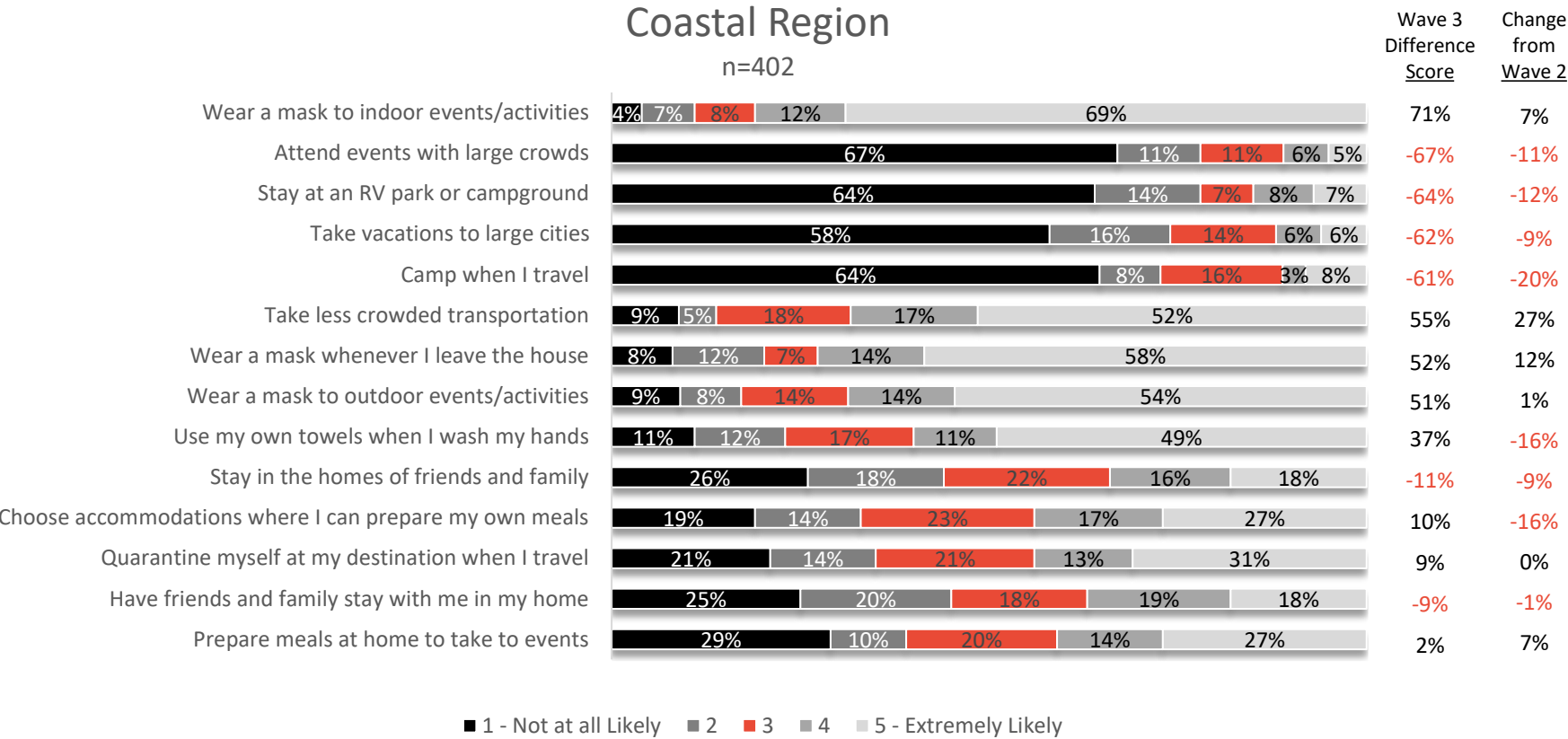
North Carolina

Difference Scores (%)

	<5 Years n=155	5-10 Years n=177	11-20 Years n=216	20+ Years n=279	Born in NC n=383
Wear a mask to indoor events/activities	55	73	79	71	81
Wear a mask whenever I leave the house	38	50	55	69	62
Attend events with large crowds	-52	-71	-74	-61	-73
Use my own towels when I wash my hands	30	29	48	47	56
Wear a mask to outdoor events/activities	32	57	54	57	47
Take less crowded transportation	50	54	38	63	50
Take vacations to large cities	-46	-56	-52	-44	-66
Stay at an RV park or campground	-21	-71	-51	-56	-64
Camp when I travel	-14	-46	-44	-54	-54
Choose accommodations where I can prepare my own meals	19	21	27	40	19
Quarantine myself at my destination when I travel	-7	12	21	3	21
Prepare meals at home to take to events	4	-17	8	4	-3
Have friends and family stay with me in my home	-19	-4	-11	-4	-30
Stay in the homes of friends and family	-19	4	1	-7	-9

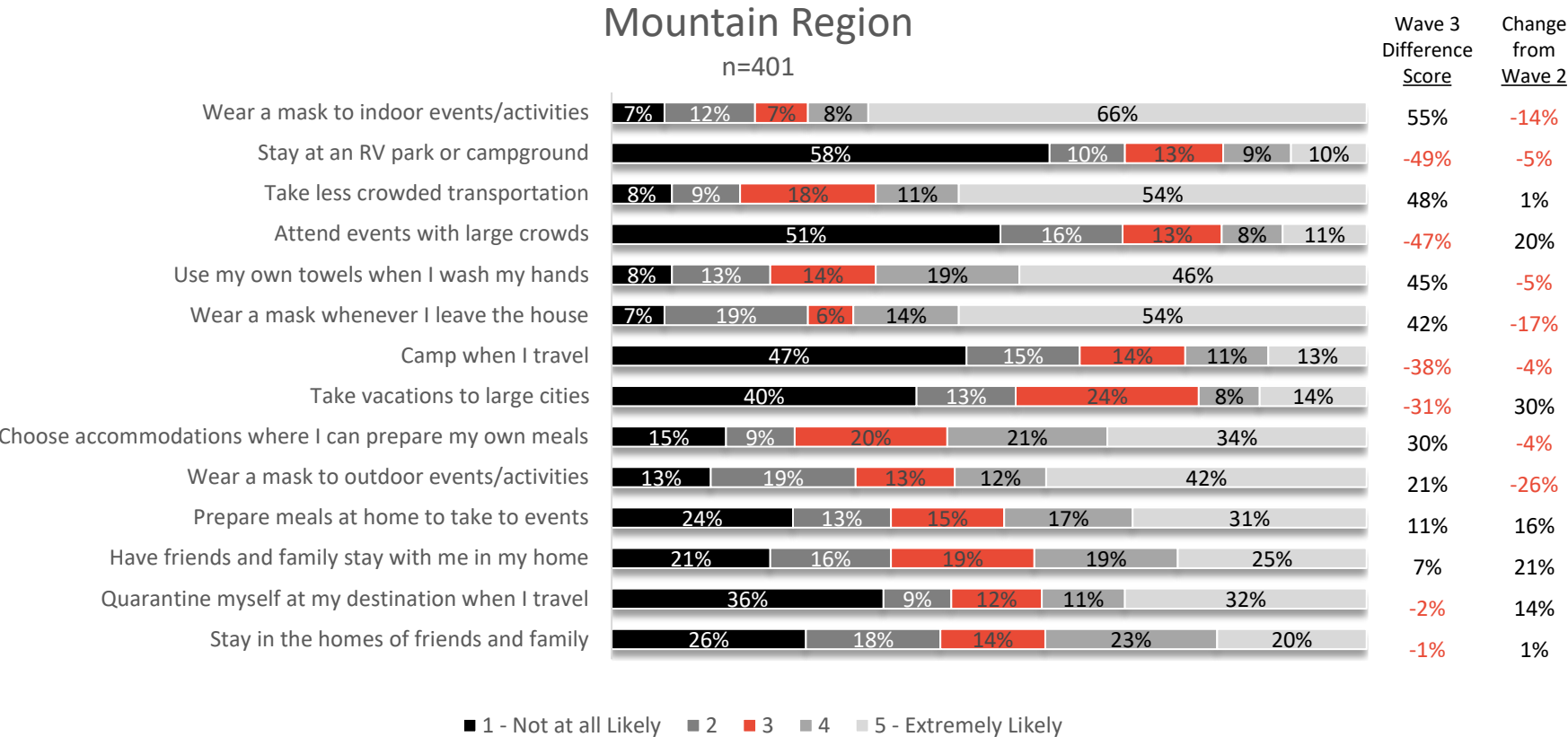
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Activity Engagement as a Result of COVID-19



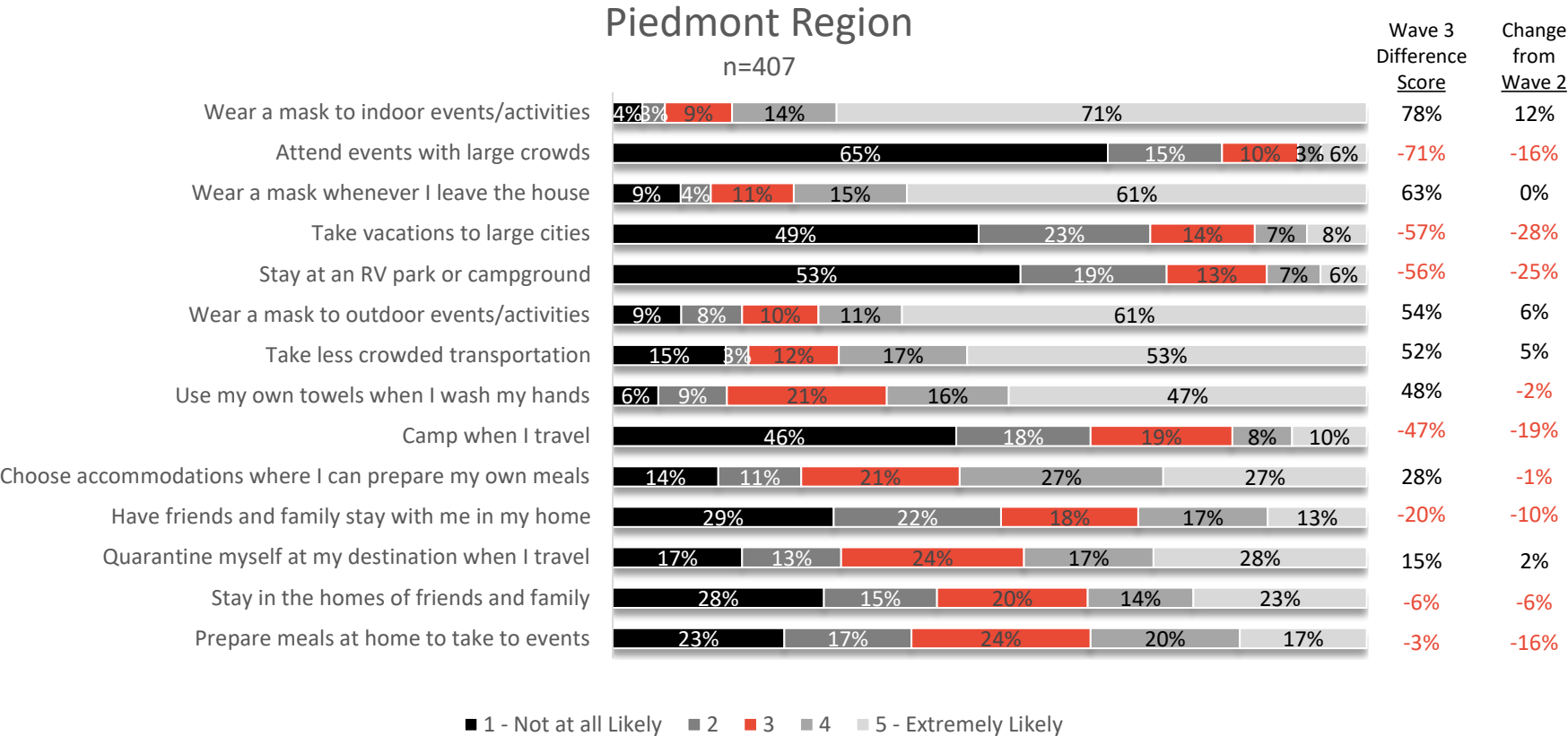
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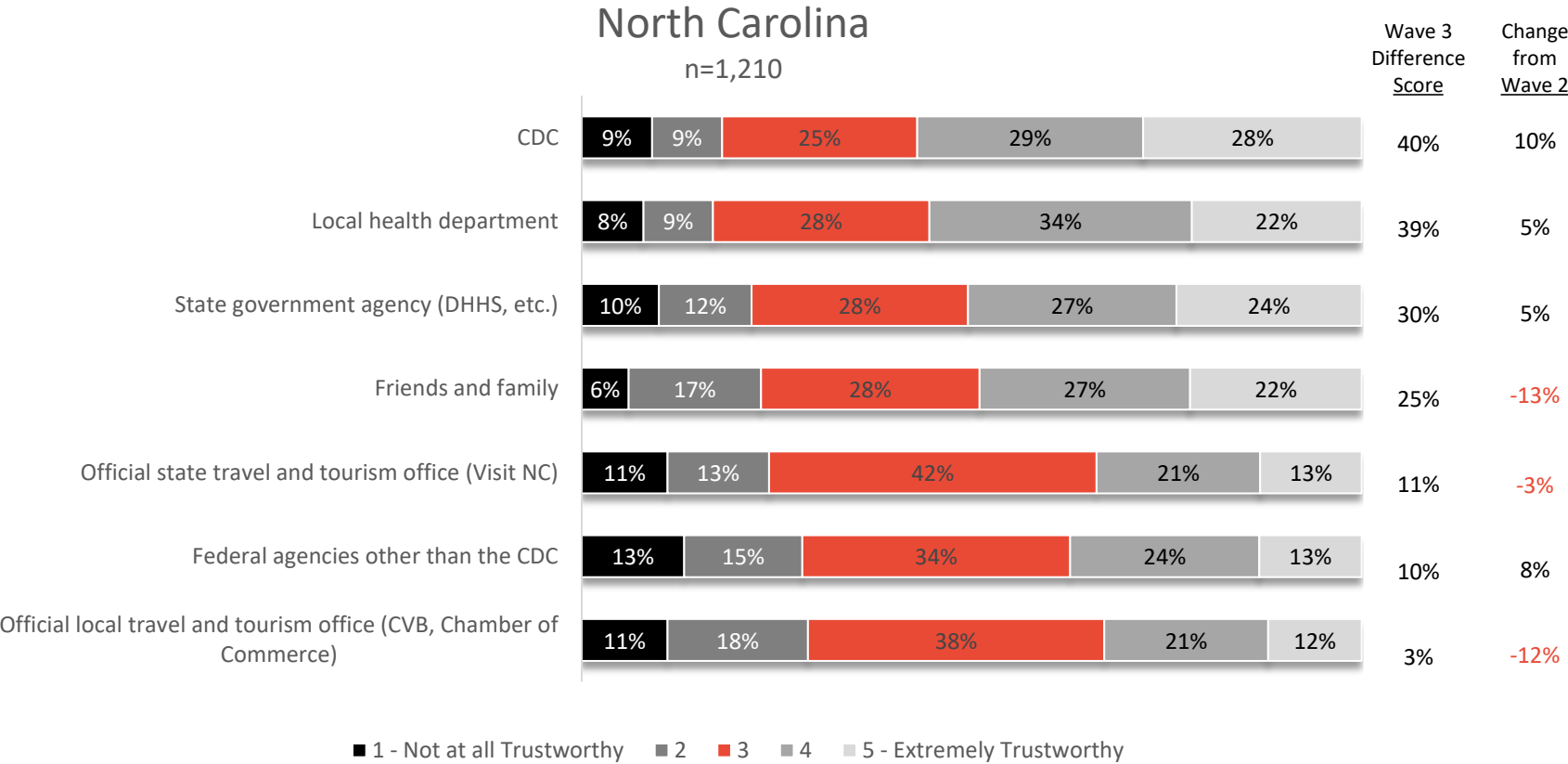
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Activity Engagement as a Result of COVID-19



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 Gained More Trust in Government Agencies



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 Place Most Trust in CDC and the Local Health Department

North Carolina

Difference Scores (%)

	18-34 n=248	35-54 n=326	55+ n=634
Friends and family	27	26	22
Local health department	33	33	48
CDC	40	34	45
State government agency (DHHS, etc.)	32	21	35
Official local travel and tourism office (CVB, Chamber of Commerce)	9	6	6
Official state travel and tourism office (Visit NC)	14	4	-7
Federal agencies other than the CDC	22	4	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)

Newest Residents Have Least Trust in State and Local Tourism Offices

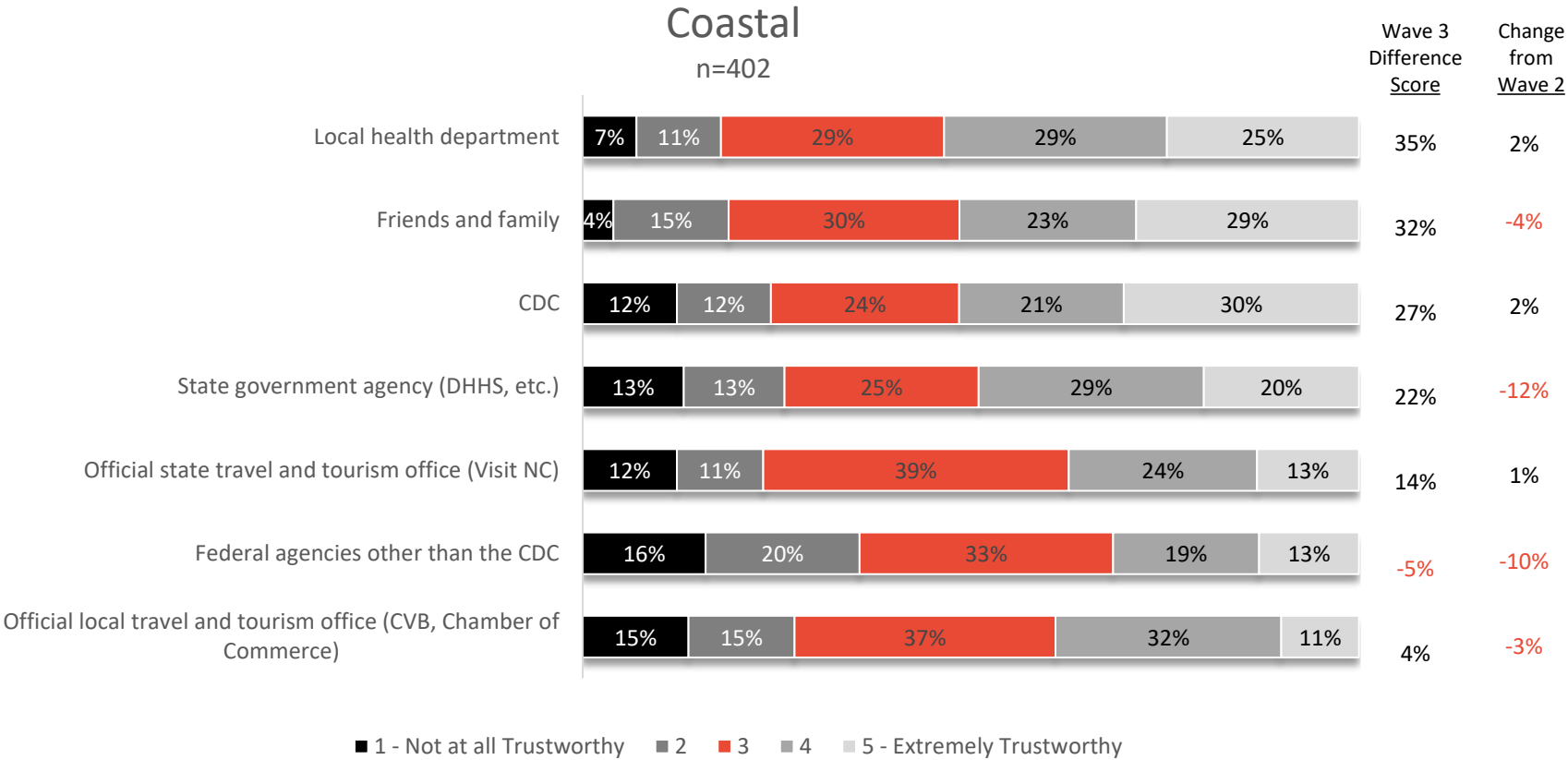
North Carolina

Difference Scores (%)

	<5 Years n=155	5-10 Years n=177	11-20 Years n=216	20+ Years n=279	Born in NC n=383
Friends and family	22	-1	32	30	29
Local health department	8	33	53	47	37
CDC	11	44	57	42	38
State government agency (DHHS, etc.)	8	35	36	34	28
Official local travel and tourism office (CVB, Chamber of Commerce)	-21	-12	19	5	8
Official state travel and tourism office (Visit NC)	-12	11	25	19	6
Federal agencies other than the CDC	-10	9	26	17	4

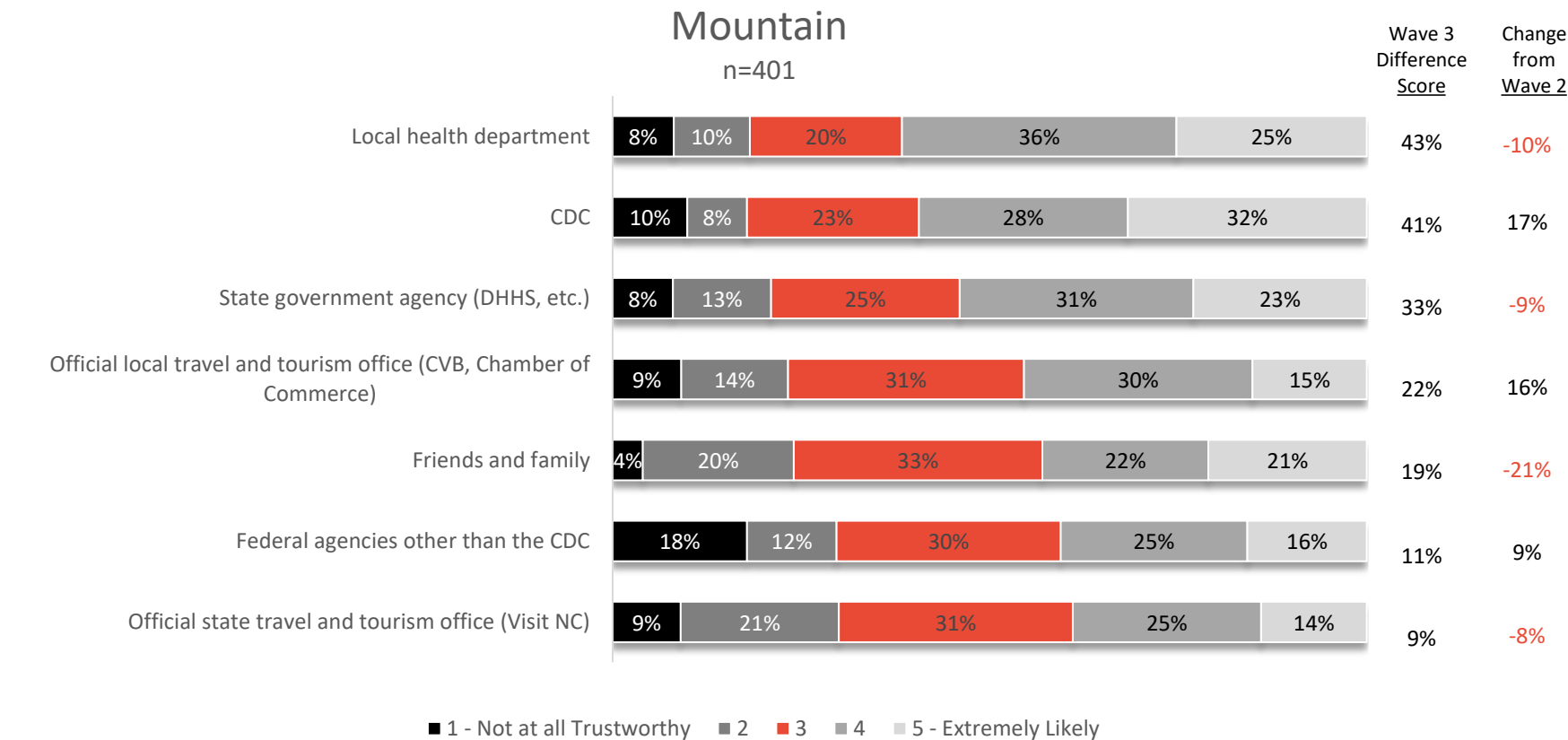
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Trustworthy Sources of Information

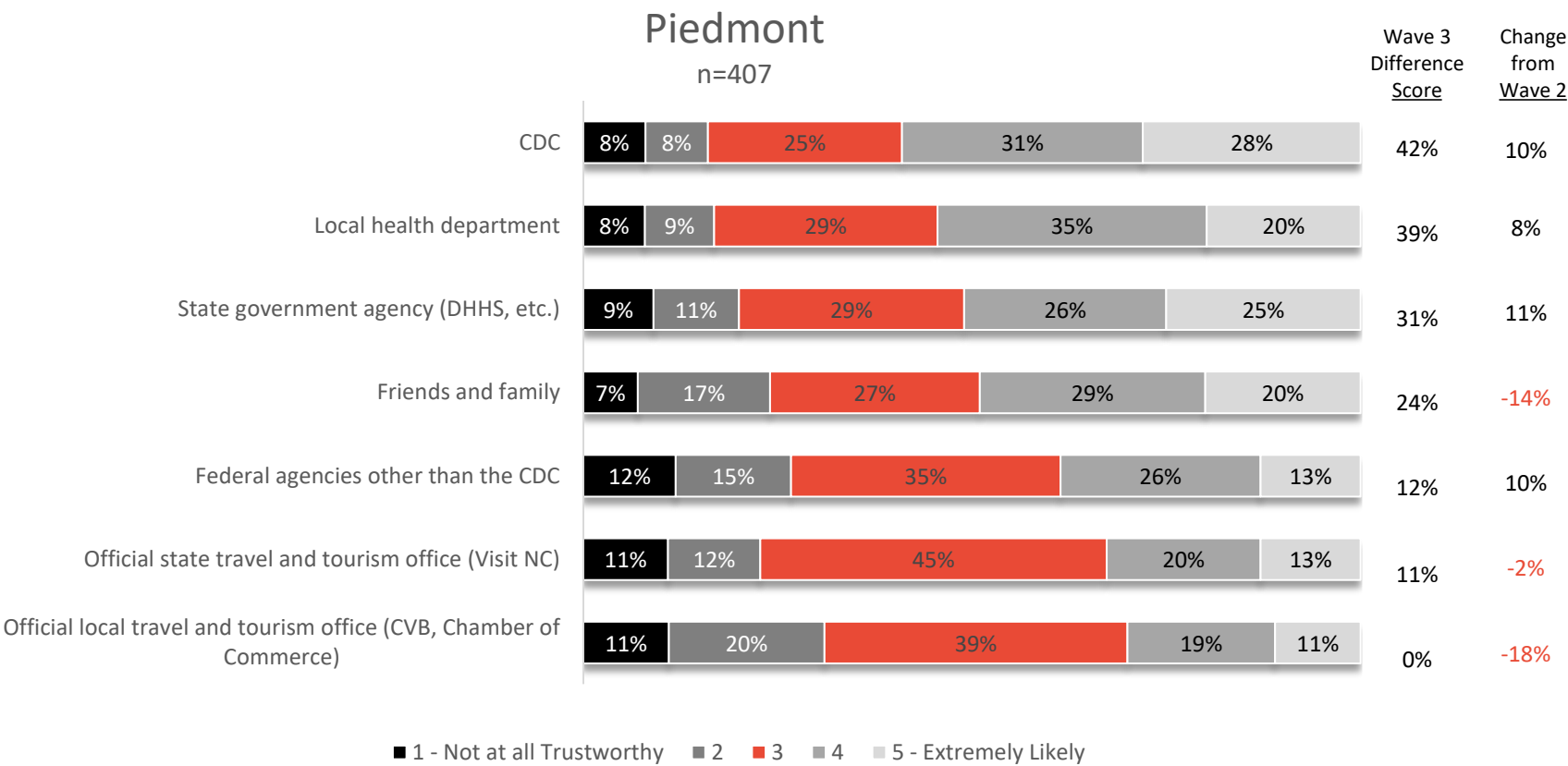


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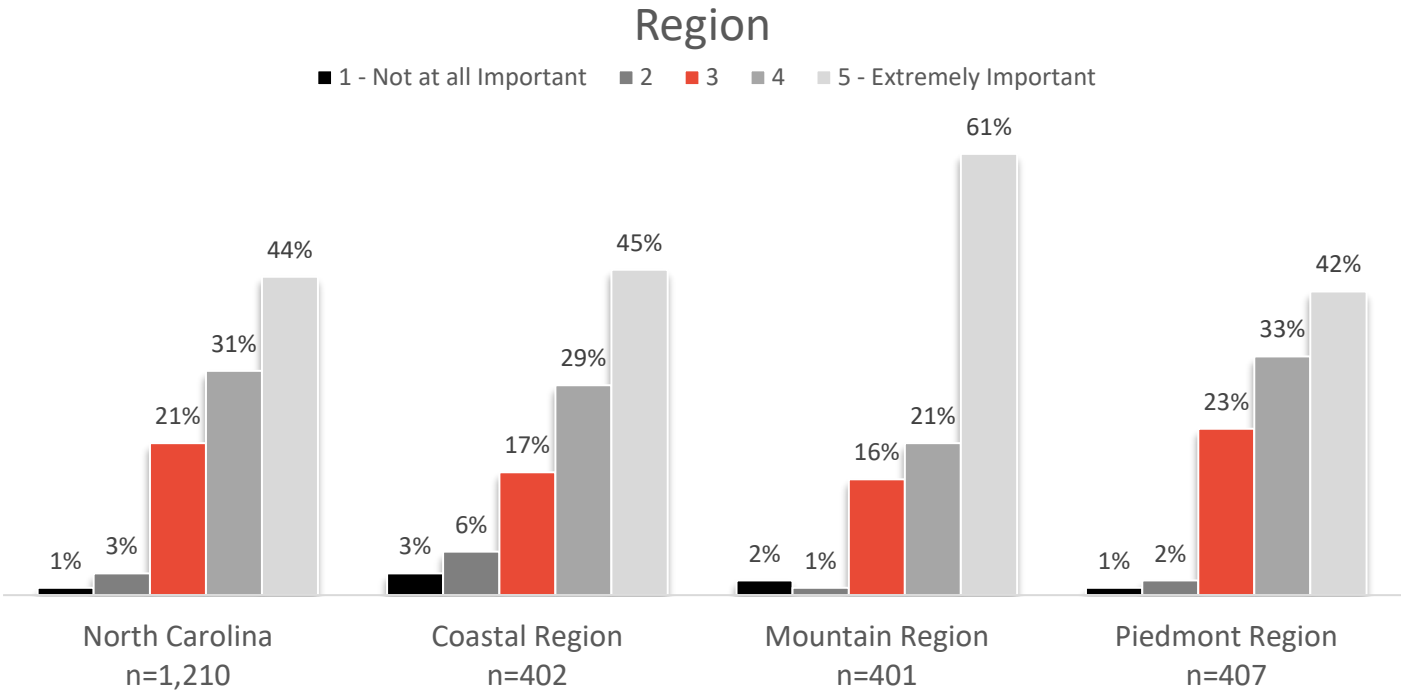


Trustworthy Sources of Information



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)

Importance of Tourism to North Carolina's Post-COVID-19 Recovery Greater Than in Wave 2

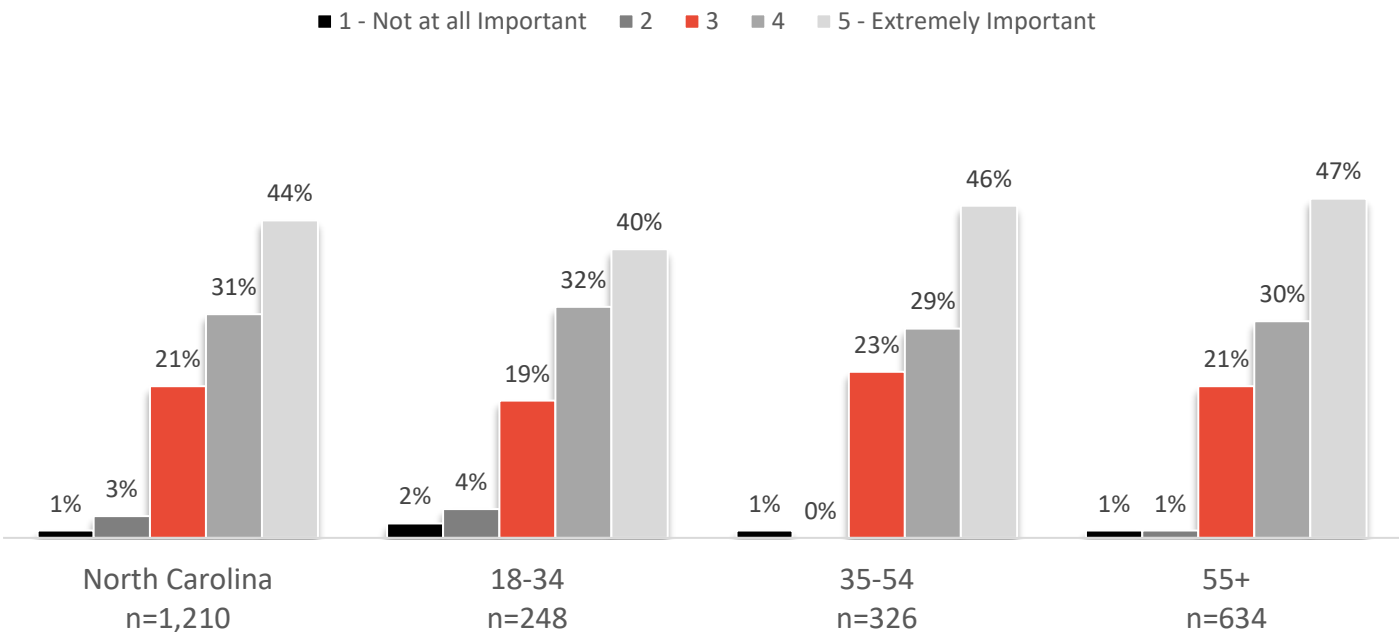


Difference Score	71%	66%	79%	71%
Change from Wave 2	8%	4%	18%	-2%

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?

Regardless of Age Tourism is Viewed as Important to North Carolina's Post-COVID-19 Recovery

Resident Age

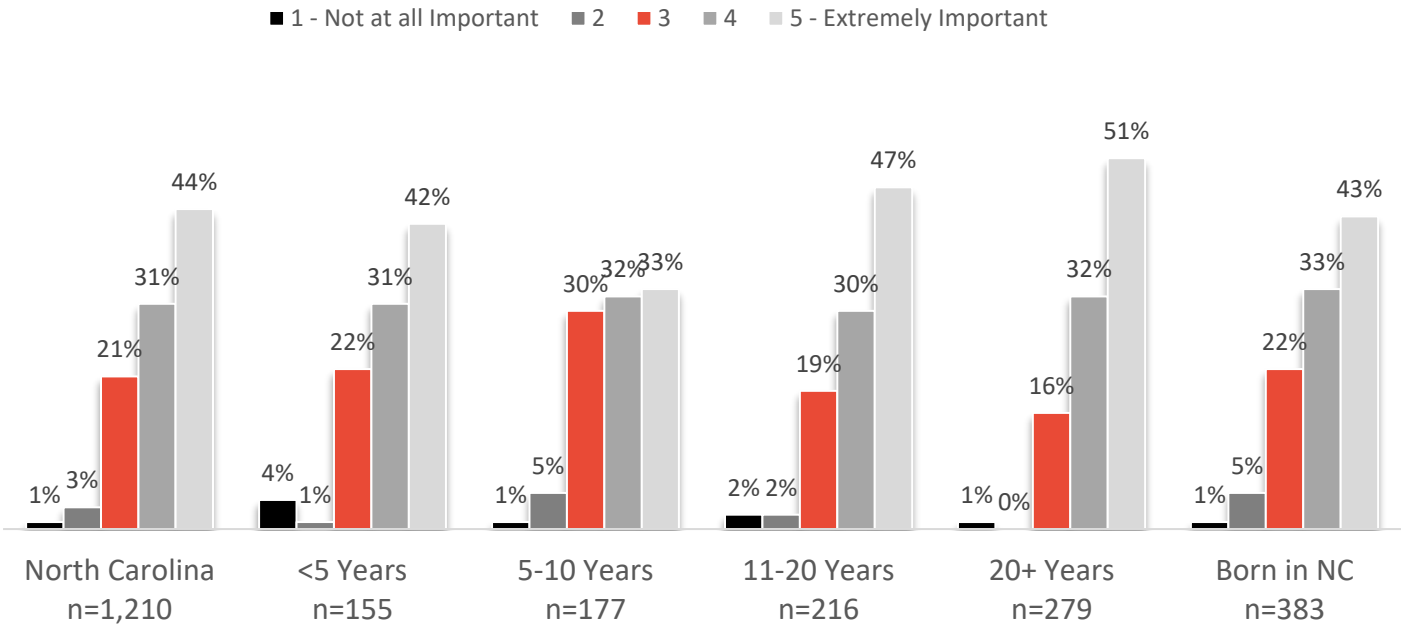


Difference Score	71%	64%	74%	75%
Change from Wave 2	8%	20%	12%	-1%

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?

The Importance of Tourism to North Carolina's Post-COVID-19 Recovery Remains Strong Among Short and Long-Term Residents

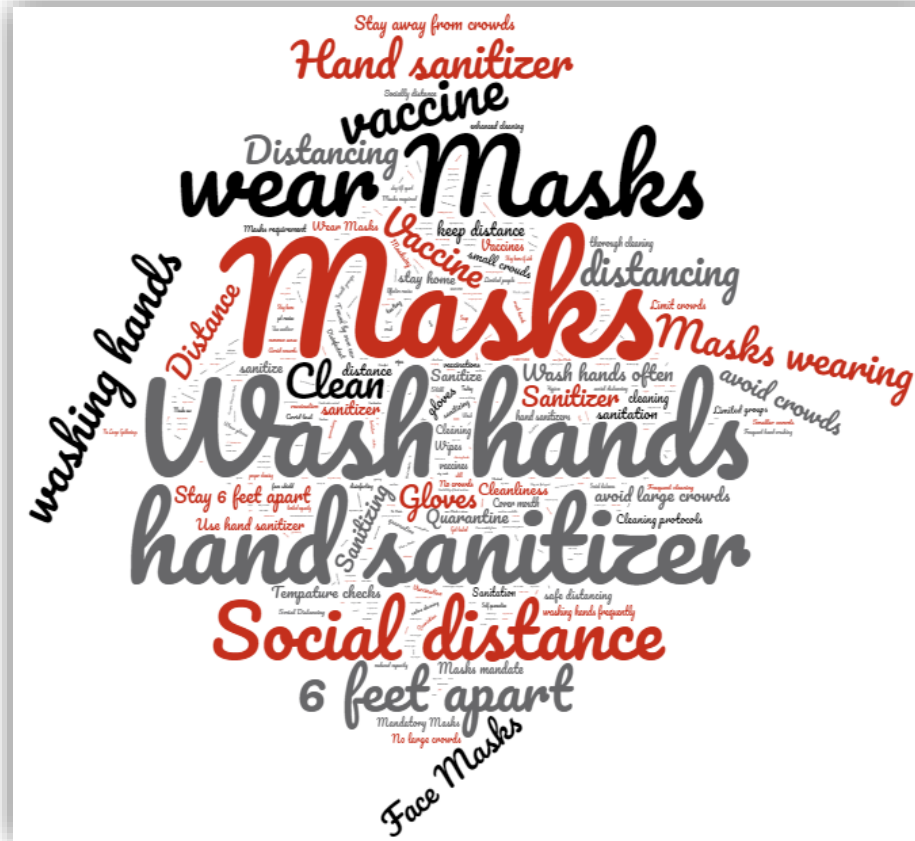
Length of Residency



Difference Score	71%	68%	59%	73%	83%	67%
Change from Wave 2	8%	54%	-3%	-12%	13%	0%

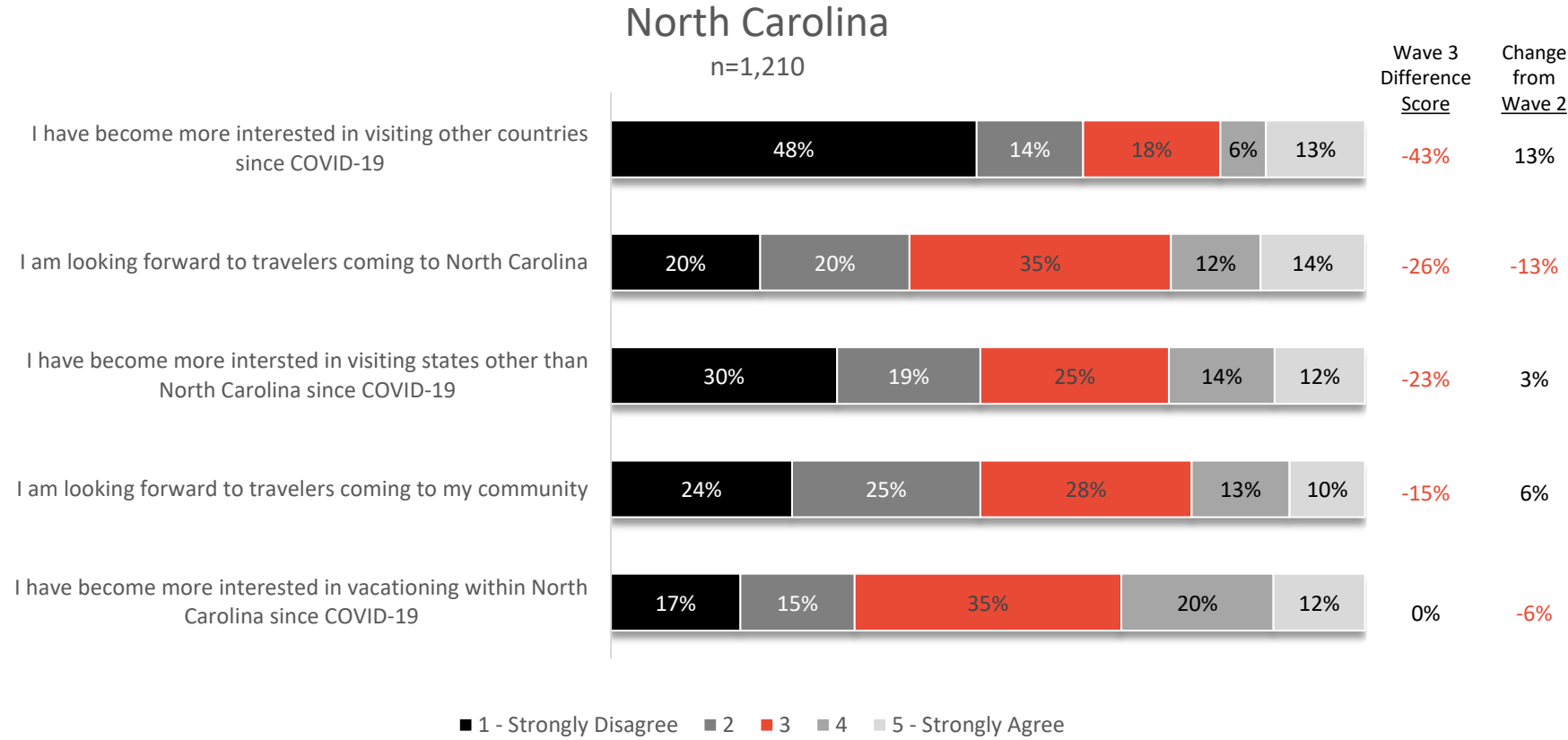
Q2: Using a scale of 1 (not at all important) to 5 (extremely important), how important do you think tourism is to the recovery of the North Carolina economy after COVID-19?

Wearing Face Masks, Social Distancing and Washing Hands Most Often Cited Safety Protocols Essential for Travel After COVID-19



Q3: Please list up to five (5) safety protocols that you feel are essential for you to travel after COVID-19.

North Carolina Residents Still Not Yet Ready to Travel or Welcome Visitors



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.

Younger Residents Most Interested in Traveling In North Carolina and the U.S.

North Carolina
Difference Scores (%)

	18-34 n=248	35-54 n=326	55+ n=634
I have become more interested in visiting other countries since COVID-19	-8	-51	-68
I have become more intersted in visiting states other than North Carolina since COVID-19	-1	-26	-39
I am looking forward to travelers coming to my community	-19	-15	-39
I am looking forward to travelers coming to North Carolina	-18	-18	-10
I have become more interested in vacationing within North Carolina since COVID-19	-1	-1	--

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

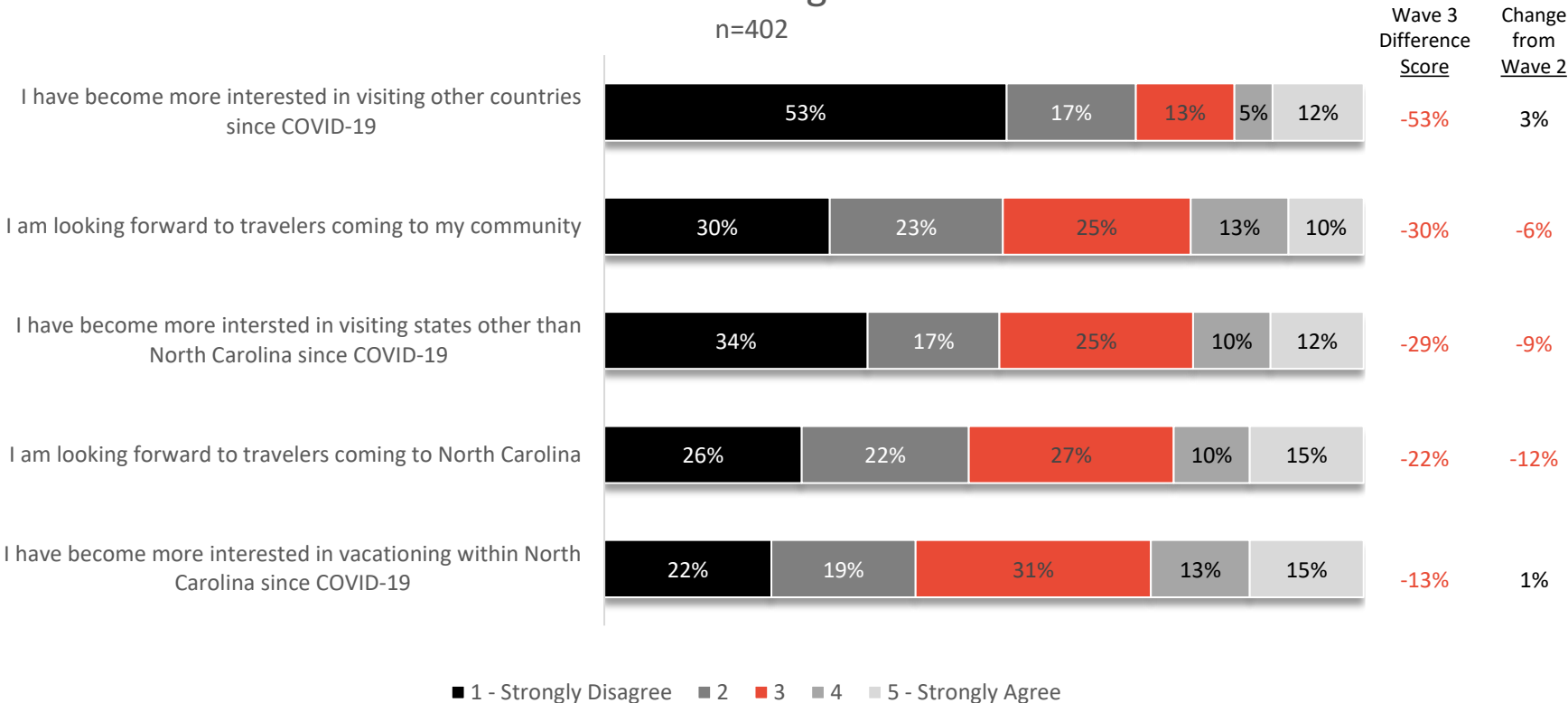
Difference Scores (%)

	<5 Years n=155	5-10 Years n=177	11-20 Years n=216	20+ Years n=279	Born in NC n=383
I have become more interested in visiting other countries since COVID-19	-58	-25	-29	-46	-49
I have become more interested in visiting states other than North Carolina since COVID-19	-27	-12	-7	-20	-33
I am looking forward to travelers coming to my community	-25	-16	-12	-26	-34
I am looking forward to travelers coming to North Carolina	-30	-5	1	-2	-30
I have become more interested in vacationing within North Carolina since COVID-19	-11	-14	14	7	-3

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.

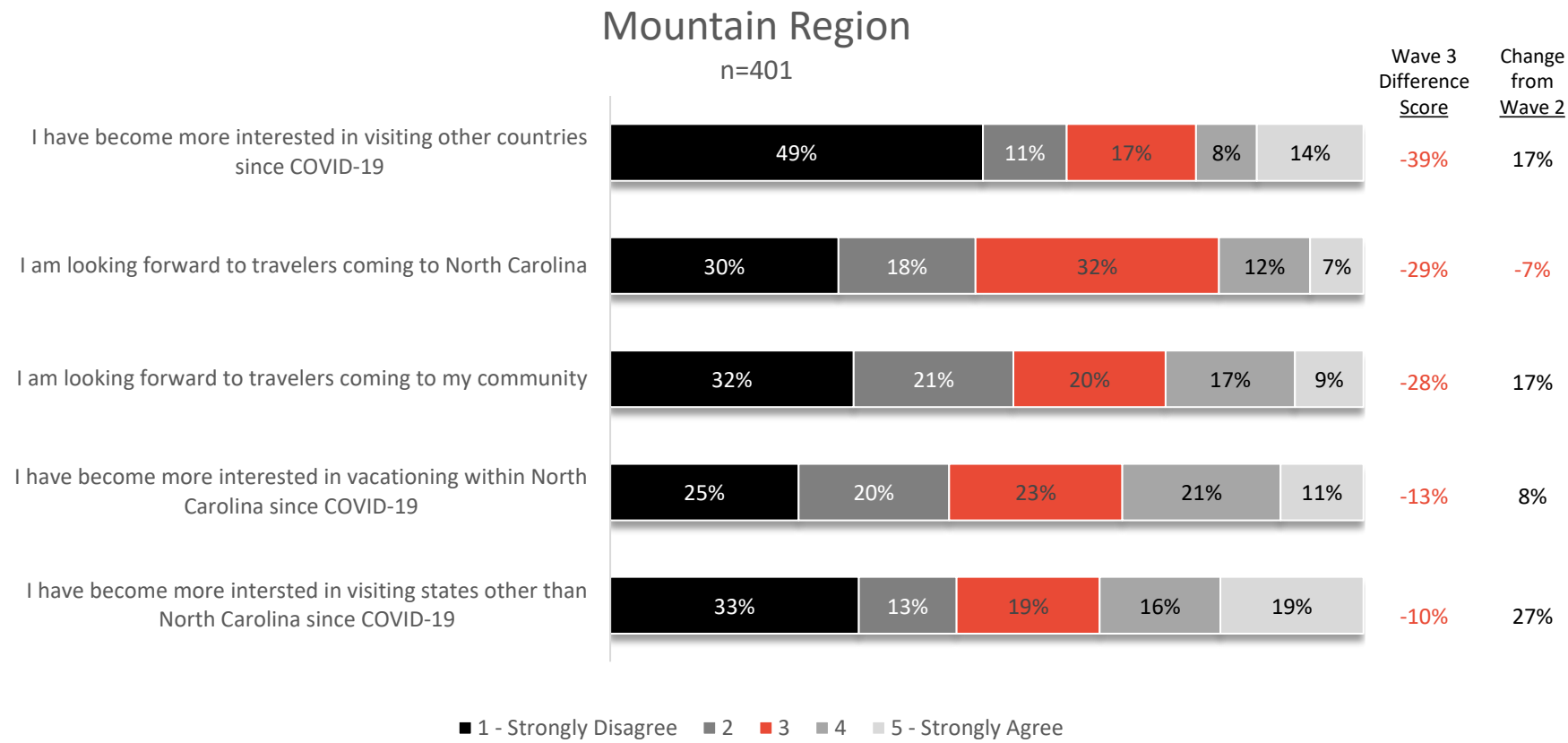
Interest in Traveling and Welcoming Visitors

Coastal Region n=402



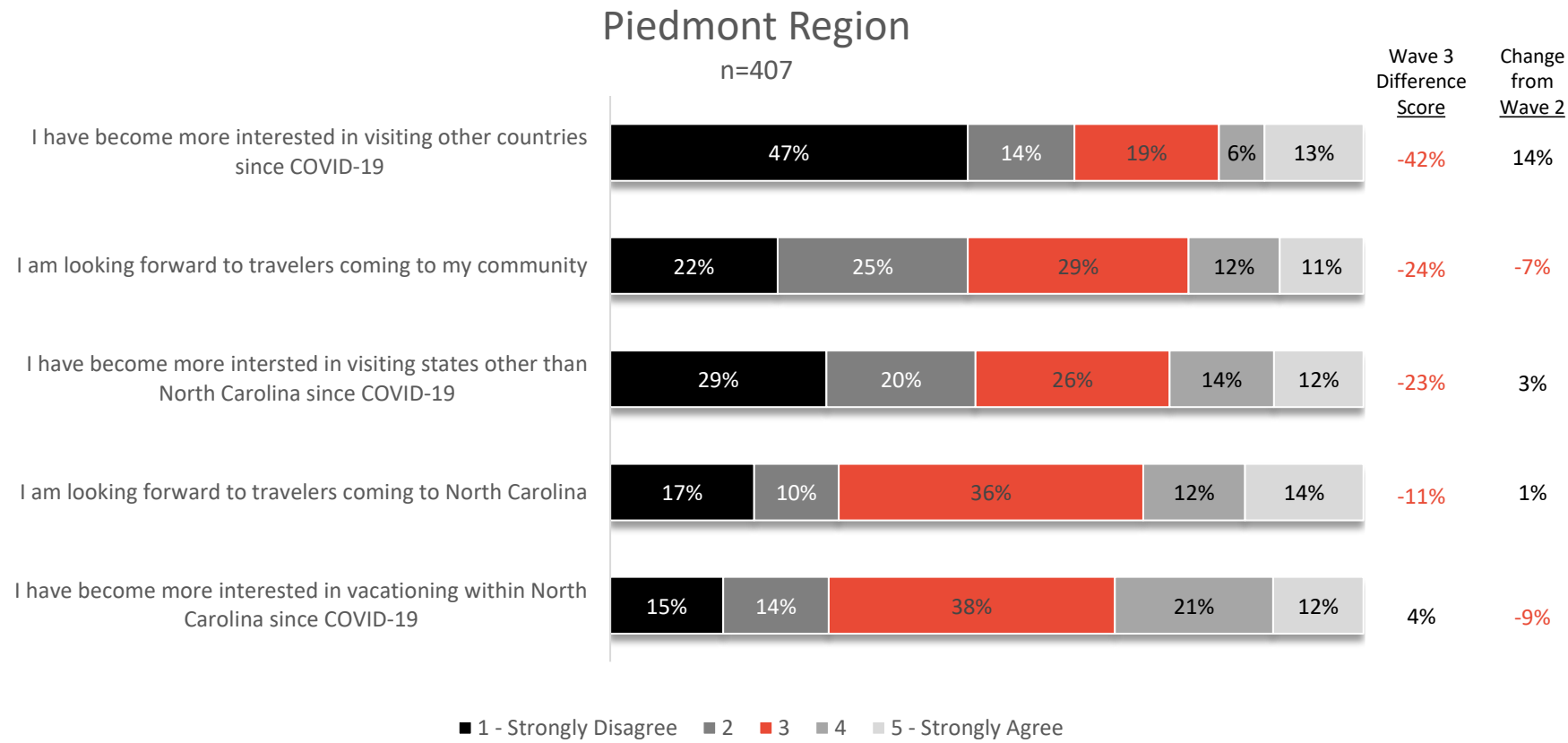
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Interest in Traveling and Welcoming Visitors



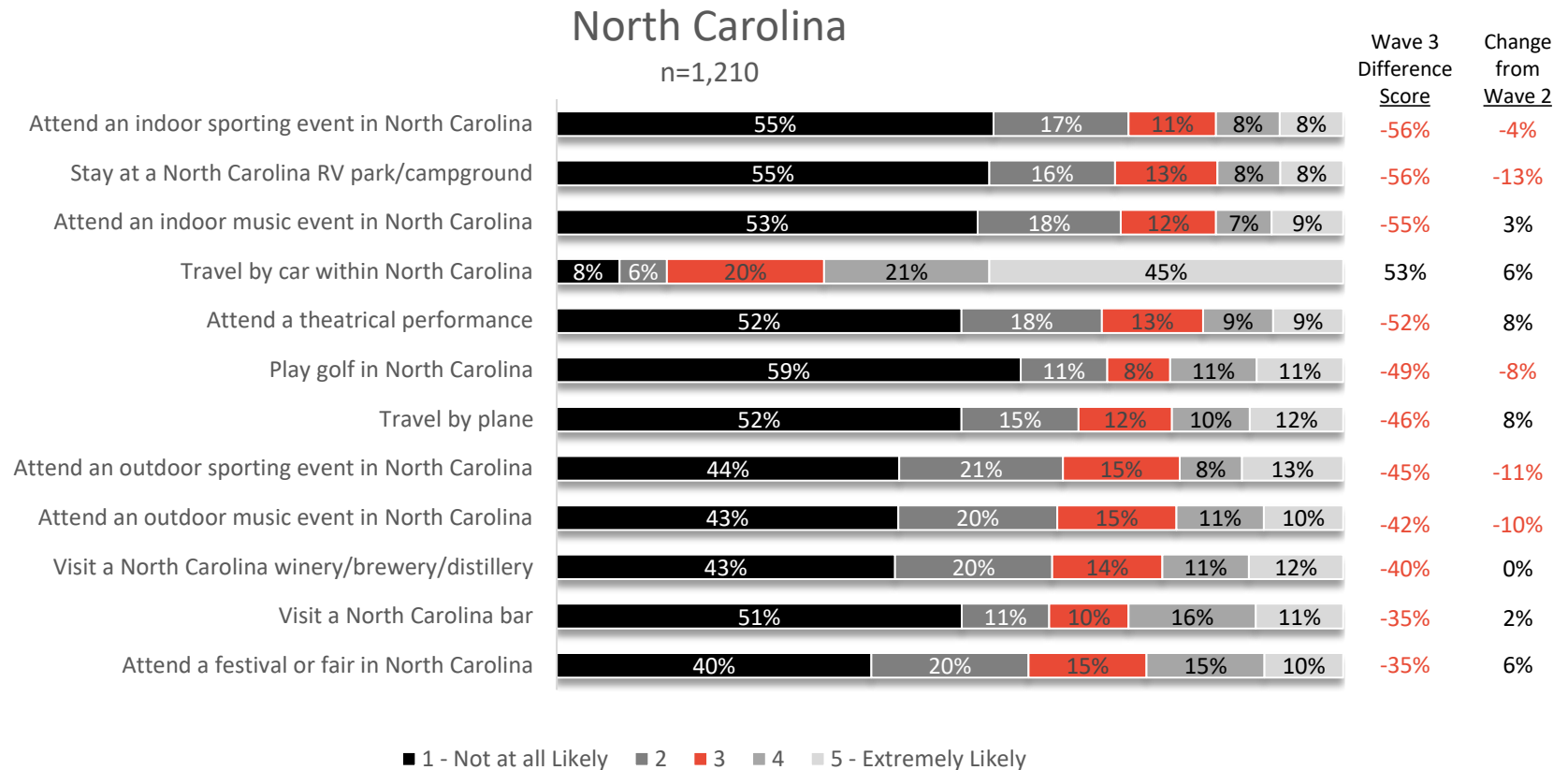
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Interest in Traveling and Welcoming Visitors



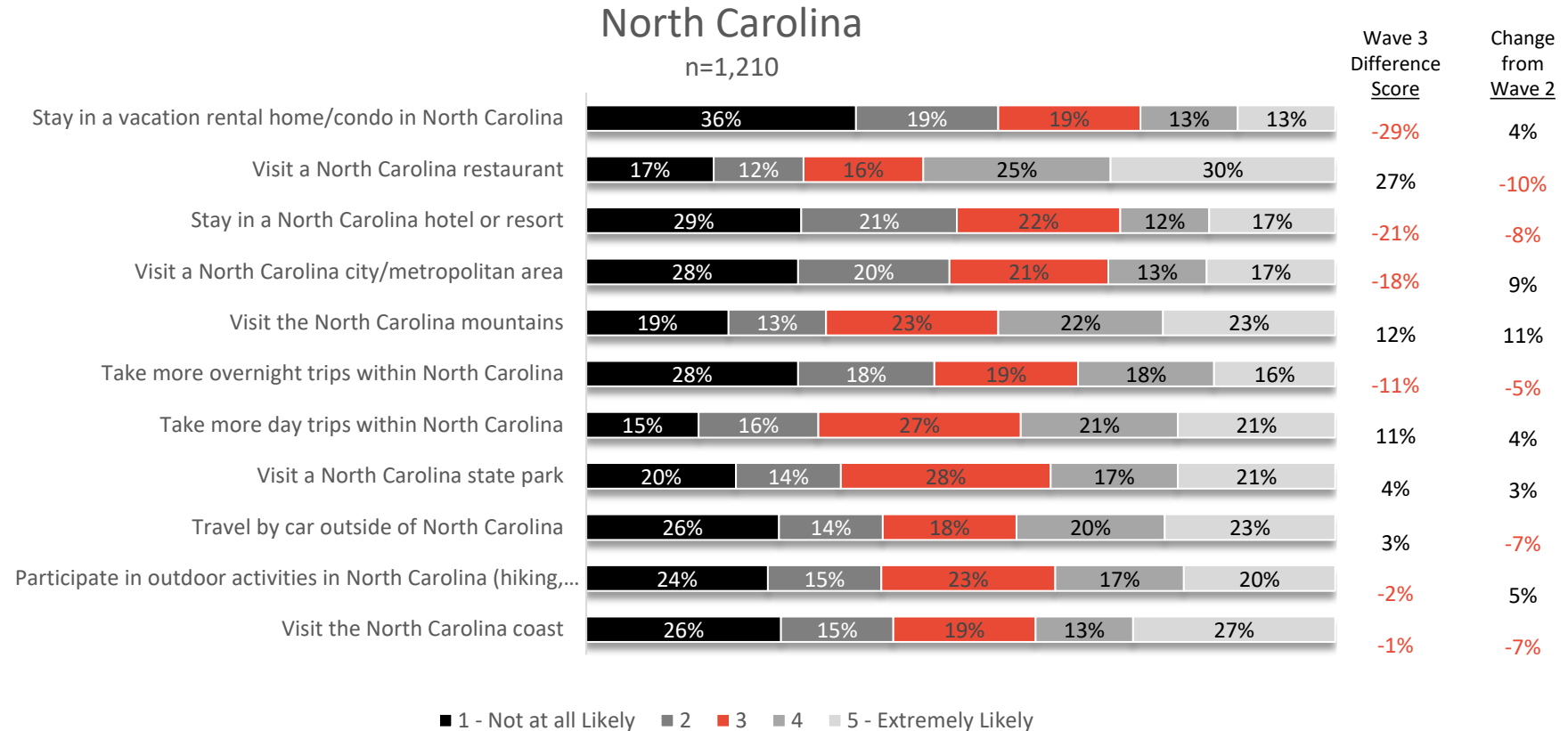
Q4: Using a scale of 1 (strongly disagree) to 5 (strongly agree), please indicate your level of agreement with each of the following statements now that the North Carolina COVID-19 restrictions are beginning to ease.

Traveling by Car to North Carolina Outdoor Destinations Still 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 Still 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.

Older Residents Least Likely to Engage in Most Activities During the Next Three Months

North Carolina Difference Scores (%)

	18-34 n=248	35-54 n=326	55+ n=634
Attend a theatrical performance	-38	-43	-72
Attend an indoor music event in North Carolina	-36	-41	-84
Travel by plane	-32	-39	-64
Attend an indoor sporting event in North Carolina	-33	-47	-83
Travel by car within North Carolina	59	40	58
Stay at a North Carolina RV park/campground	-35	-45	-82
Play golf in North Carolina	-40	-35	-69
Visit a North Carolina winery/brewery/distillery	-29	-26	-61
Visit a North Carolina bar	7	-31	-74
Attend an outdoor sporting event in North Carolina	-28	-33	-69
Attend an outdoor music event in North Carolina	-20	-34	-69
Attend a festival or fair in North Carolina	-4	-32	-65

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.

Older Residents Least Likely to Engage in Most Activities During the Next Three Months

North Carolina

Difference Scores (%)

	18-34 n=248	35-54 n=326	55+ n=634
Take more overnight trips within North Carolina	12	-8	-33
Stay in a vacation rental home/condo in North Carolina	-20	-12	-51
Visit the North Carolina mountains	8	18	12
Stay in a North Carolina hotel or resort	-10	-16	-36
Visit a North Carolina city/metropolitan area	13	-17	-45
Visit a North Carolina restaurant	38	28	15
Take more day trips within North Carolina	12	17	5
Visit a North Carolina state park	15	4	-6
Travel by car outside of North Carolina	20	-4	-5
Visit the North Carolina coast	-5	8	-5
Participate in outdoor activities in North Carolina (hiking, biking, kayaking, etc.)	13	10	-25

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=155	5-10 Years n=177	11-20 Years n=216	20+ Years n=279	Born in NC n=383
Attend a theatrical performance	-50	-47	-41	-45	-65
Attend an indoor music event in North Carolina	-59	-47	-42	-53	-64
Travel by plane	-51	-40	-28	-39	-58
Attend an indoor sporting event in North Carolina	-61	-45	-45	-56	-61
Travel by car within North Carolina	41	49	52	60	52
Stay at a North Carolina RV park/campground	-66	-49	-40	-50	-65
Play golf in North Carolina	-50	-22	-37	-50	-62
Visit a North Carolina winery/brewery/distillery	-36	-46	-25	-40	-45
Visit a North Carolina bar	-37	-27	-32	-46	-30
Attend an outdoor sporting event in North Carolina	-43	-44	-40	-42	-50
Attend an outdoor music event in North Carolina	-46	-30	-37	-40	-49
Attend a festival or fair in North Carolina	-54	-36	-31	-37	-30

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, are More Likely to Visit a North Carolina Restaurant

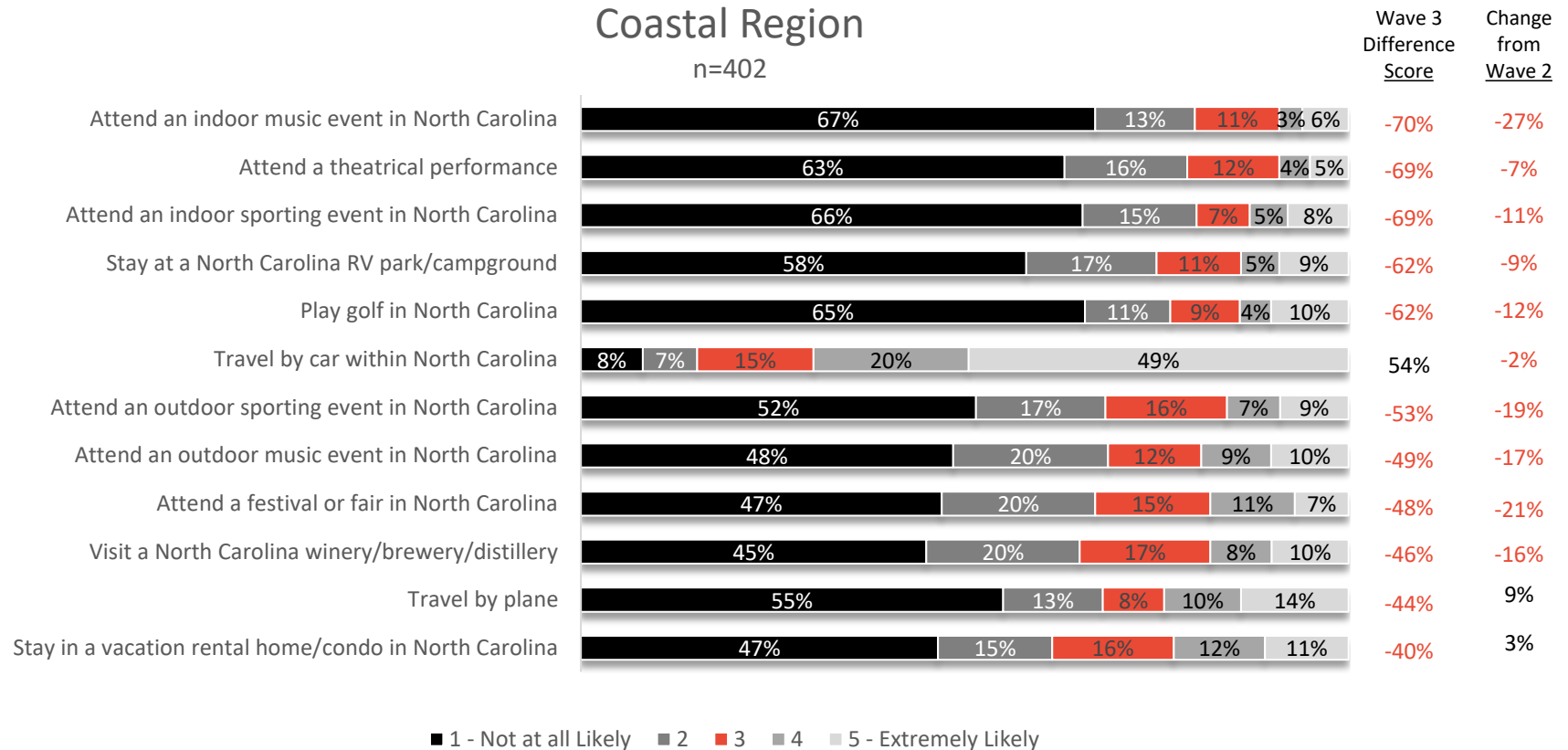
North Carolina

Difference Scores (%)

	<5 Years n=155	5-10 Years n=177	11-20 Years n=216	20+ Years n=279	Born in NC n=383
Take more overnight trips within North Carolina	-24	-14	--	-6	-14
Stay in a vacation rental home/condo in North Carolina	-41	-11	-14	-30	-37
Visit the North Carolina mountains	-4	12	16	21	9
Stay in a North Carolina hotel or resort	-27	-13	-2	-28	-25
Visit a North Carolina city/metropolitan area	-25	-22	-8	-25	-14
Visit a North Carolina restaurant	17	24	21	32	28
Take more day trips within North Carolina	-3	1	20	24	5
Visit a North Carolina state park	-17	3	10	12	2
Travel by car outside of North Carolina	-11	-4	18	7	2
Visit the North Carolina coast	-8	-9	17	8	-9
Participate in outdoor activities in North Carolina (hiking, biking, kayaking, etc.)	--	-7	16	-1	-8

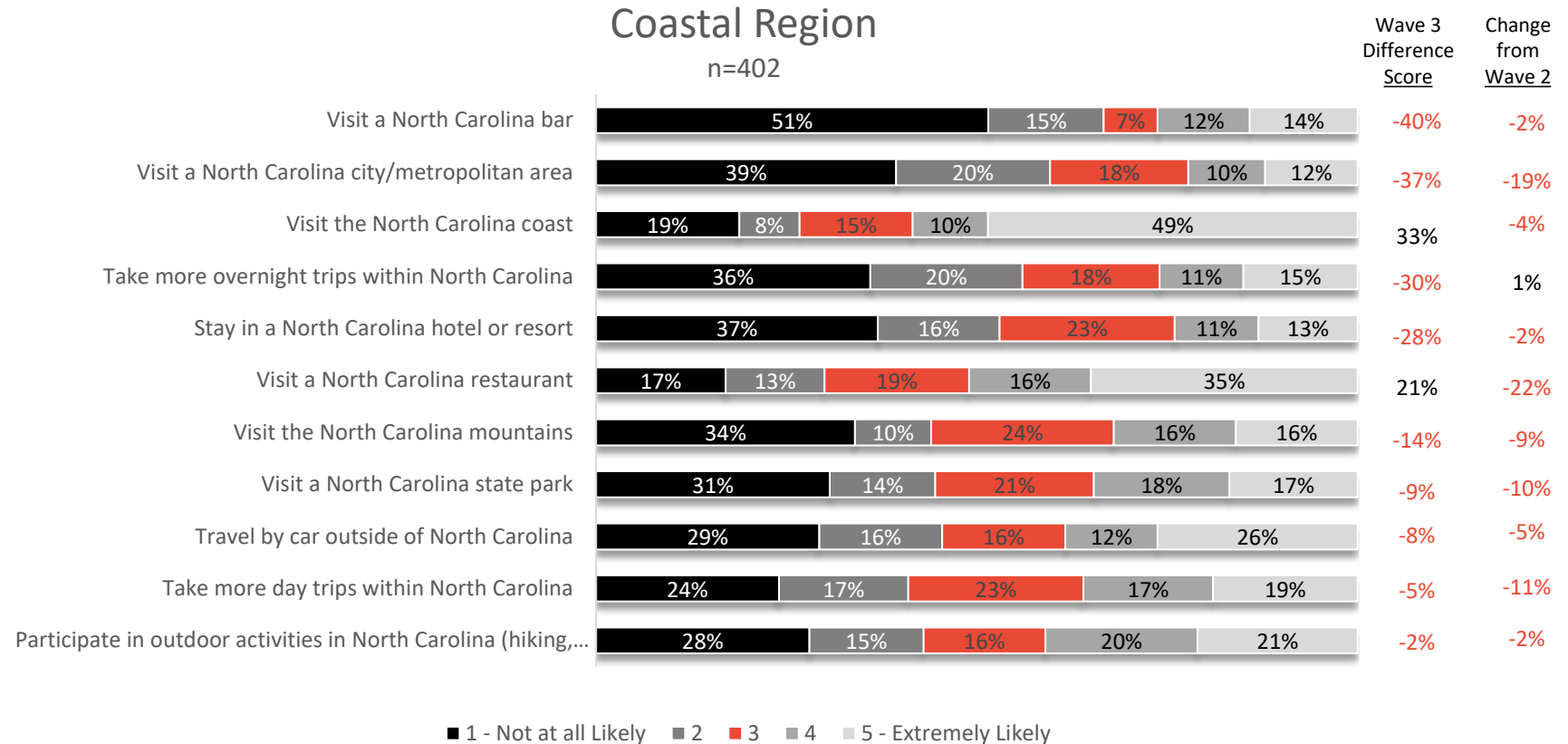
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Travel Activities in Next Three Months



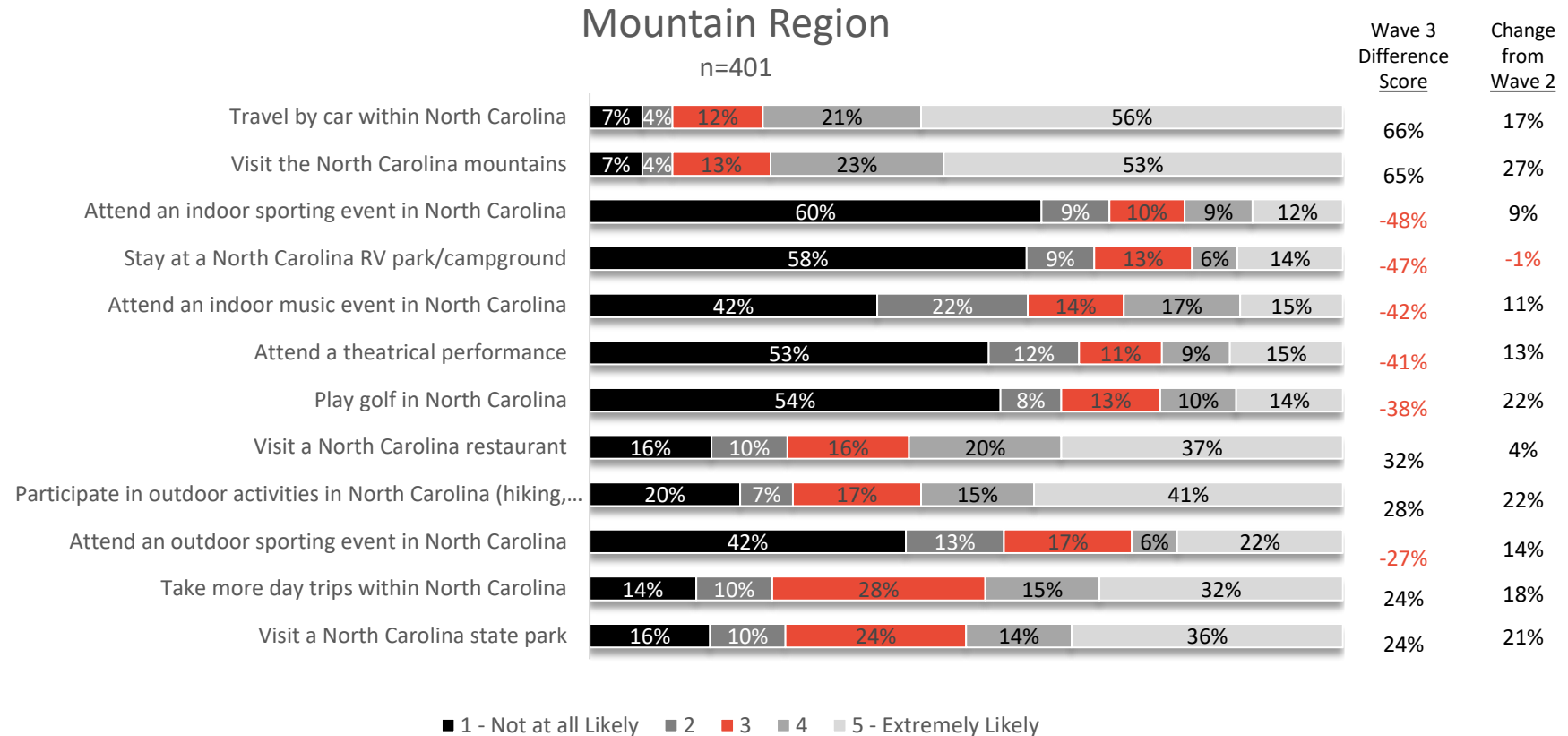
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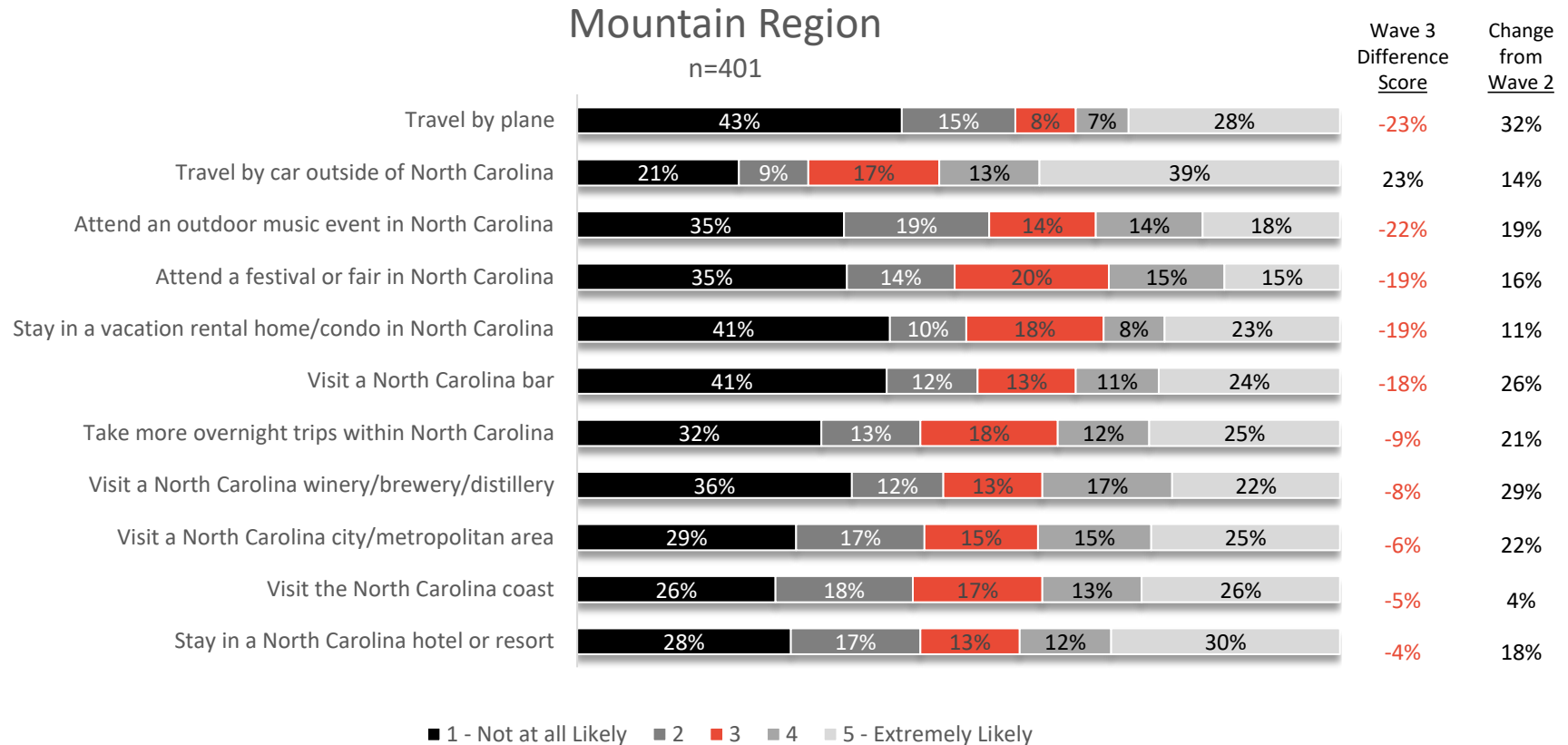
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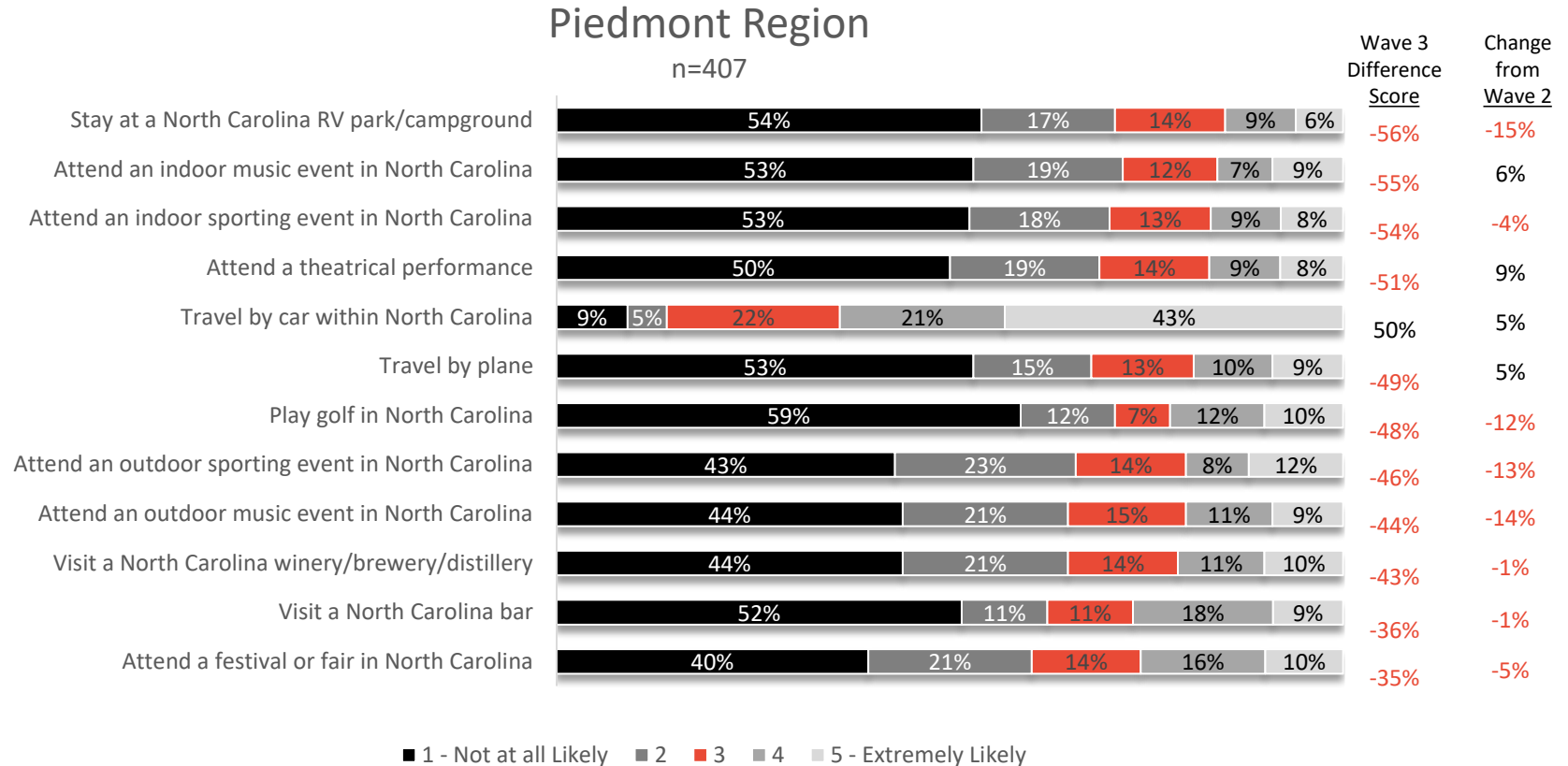
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Travel Activities in Next Three Months



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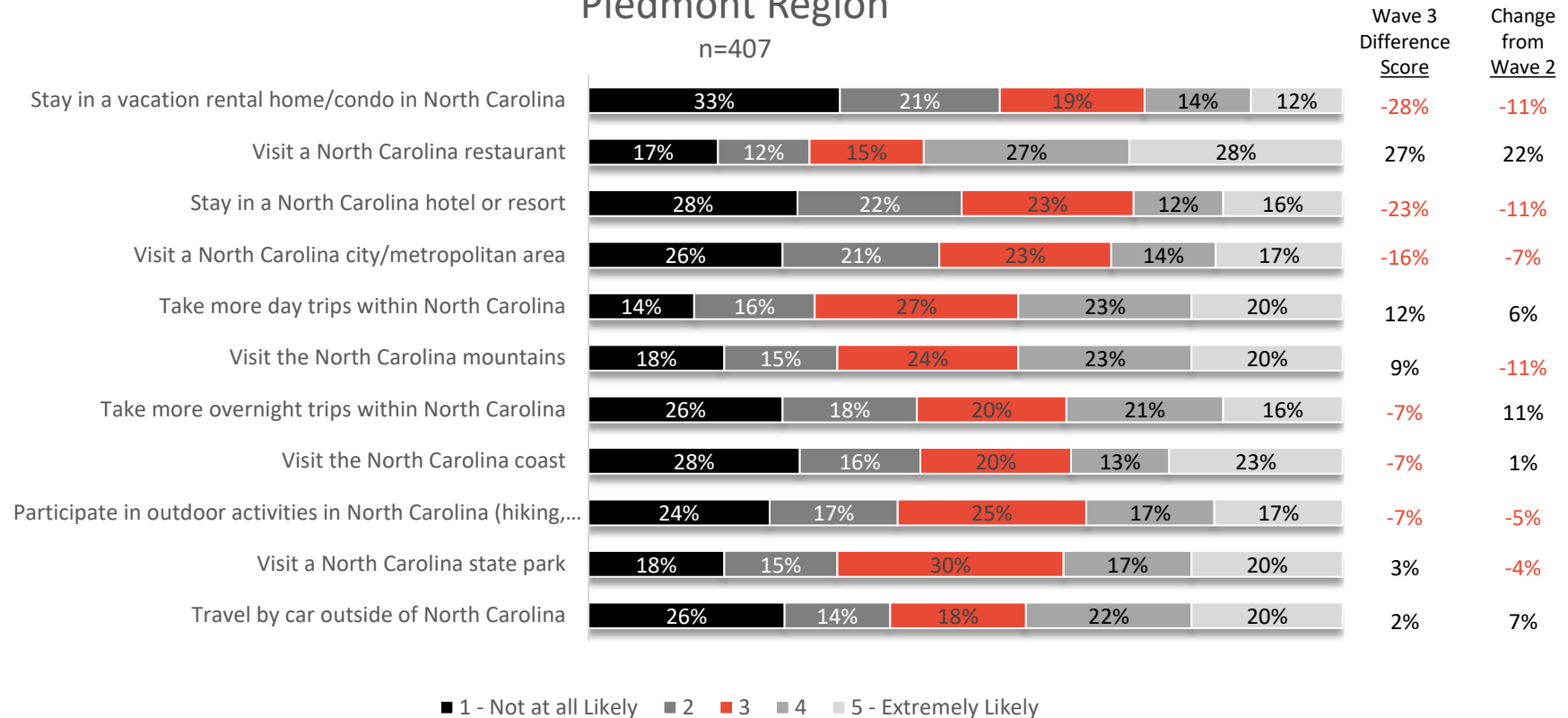
Travel Activities in Next Three Months



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.

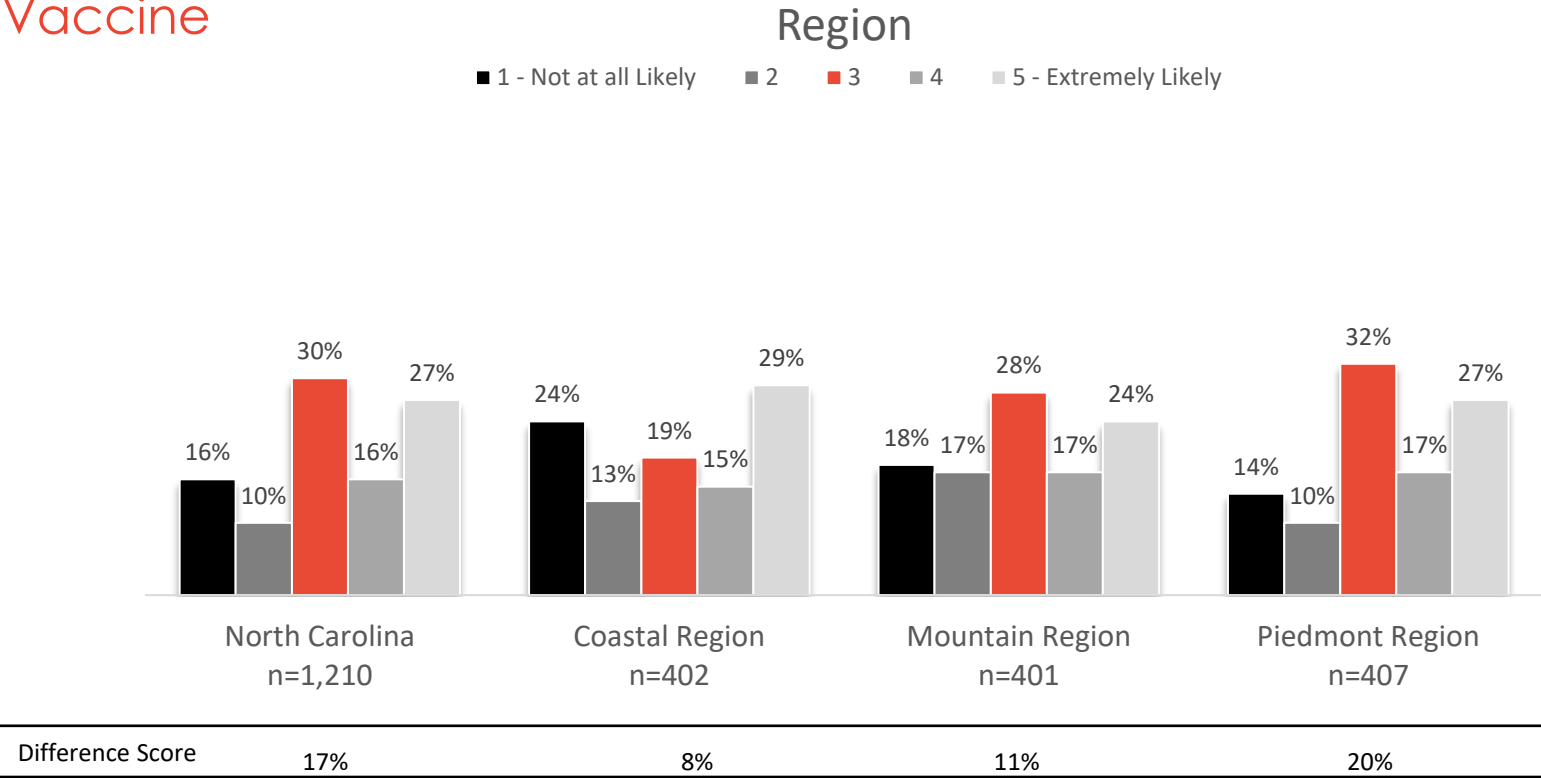
Travel Activities in Next Three Months

Piedmont Region n=407



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.

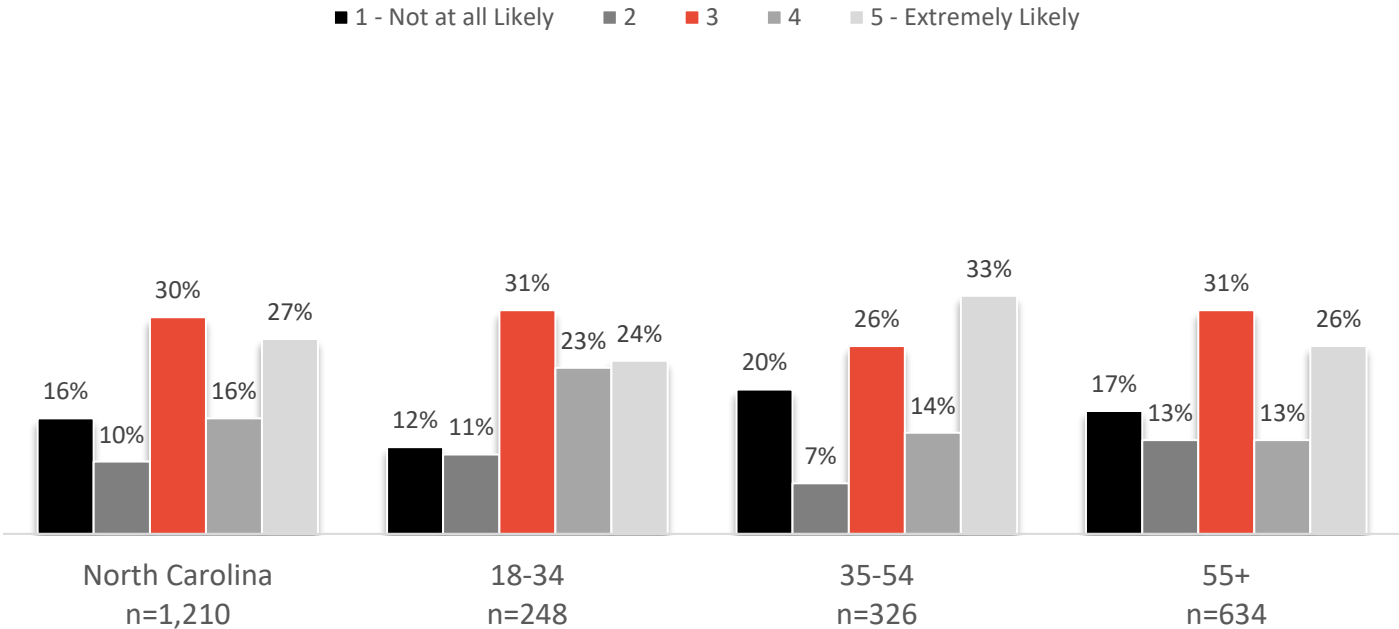
Residents are More Likely Than Not to Take a Trip Within North Carolina During the Next Six Months as a Result of the Eminent Availability of a Vaccine



Q5b: Using a scale of 1 (not at all likely) to 5 (extremely likely), as a result of the news of an effective vaccine to be available eminently, please indicate how likely you are to travel overnight within North Carolina in the next 6 months.
(Question added W3)

Youngest Residents' Travel is Most Impacted by the News of the Availability of an Effective Vaccine

Resident Age

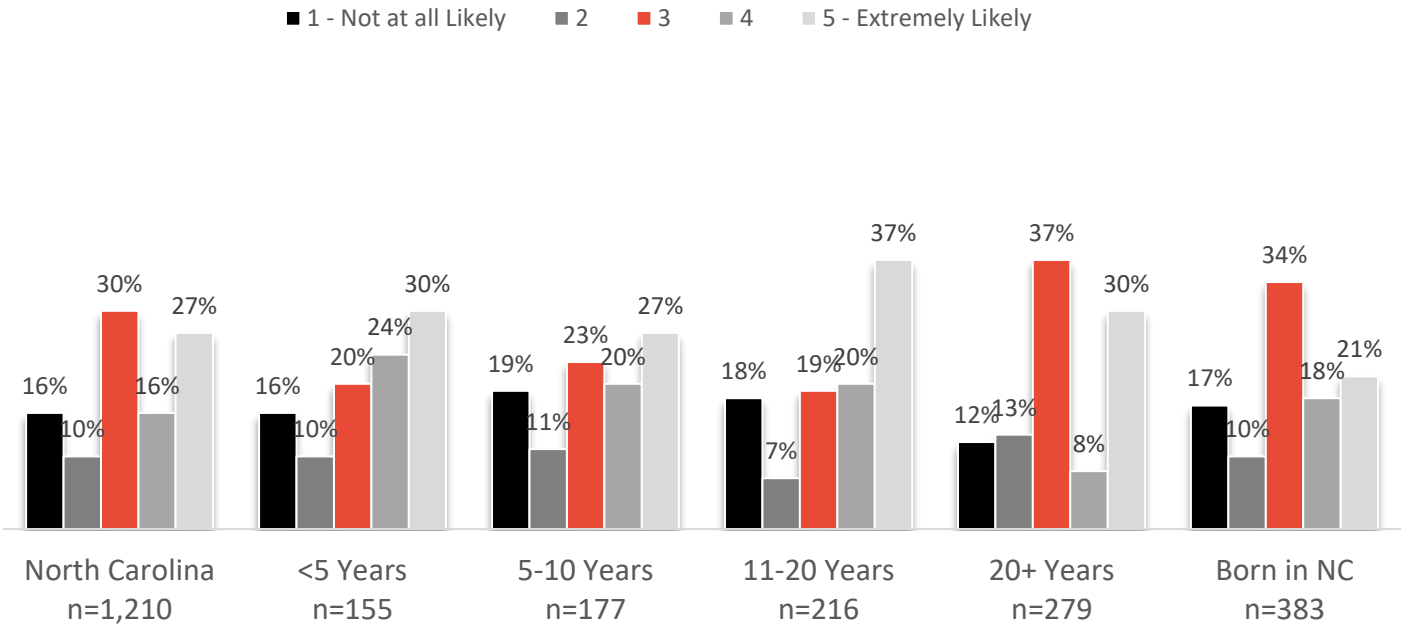


Difference Score	17%	24%	19%	9%
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Q5b: Using a scale of 1 (not at all likely) to 5 (extremely likely), as a result of the news of an effective vaccine to be available eminently, please indicate how likely you are to travel overnight within North Carolina in the next 6 months.
(Question added W3)

Those Living in North Carolina Less Than 5 Years and 11-20 Years Are the Most Likely to Travel as a Result of the Eminent Availability of a Vaccine

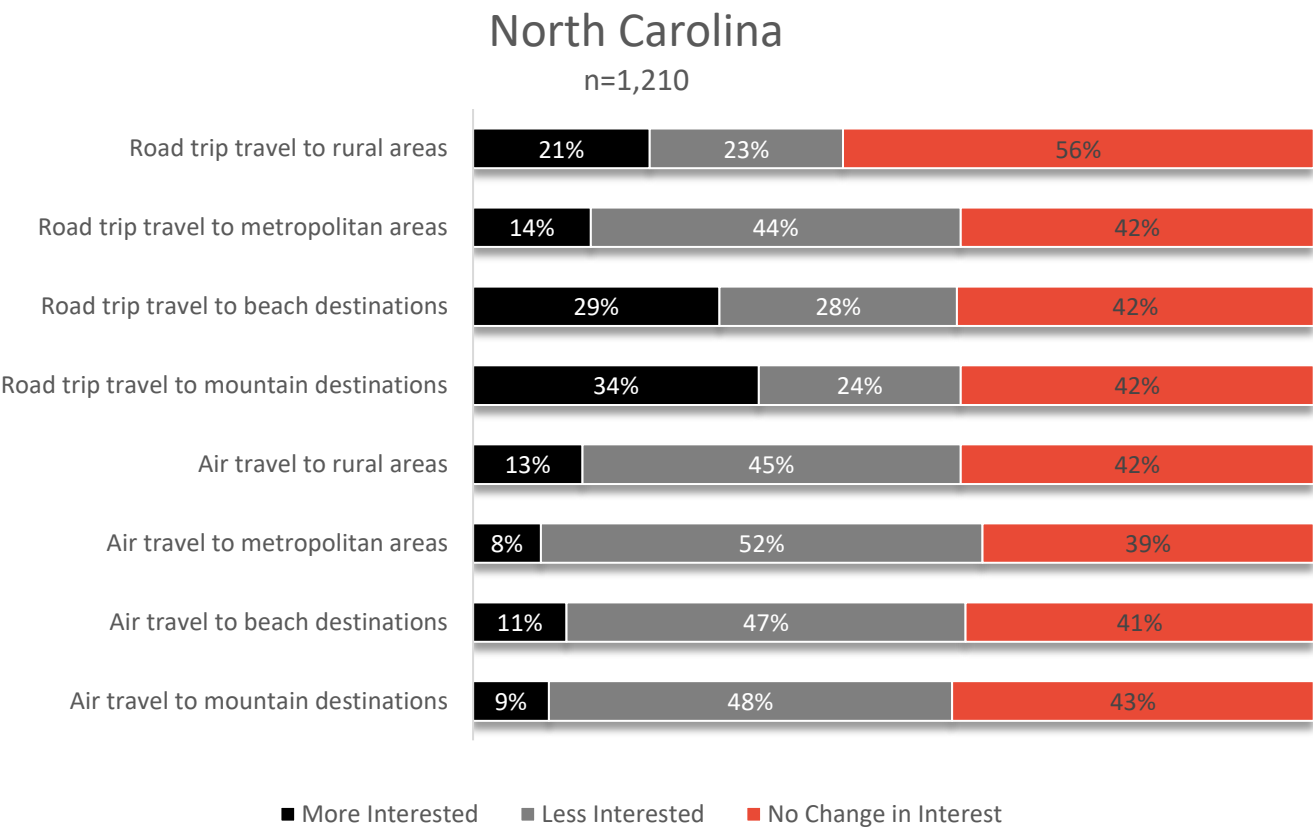
Length of Residency



Difference Score	17%	28%	16%	32%	14%	12%
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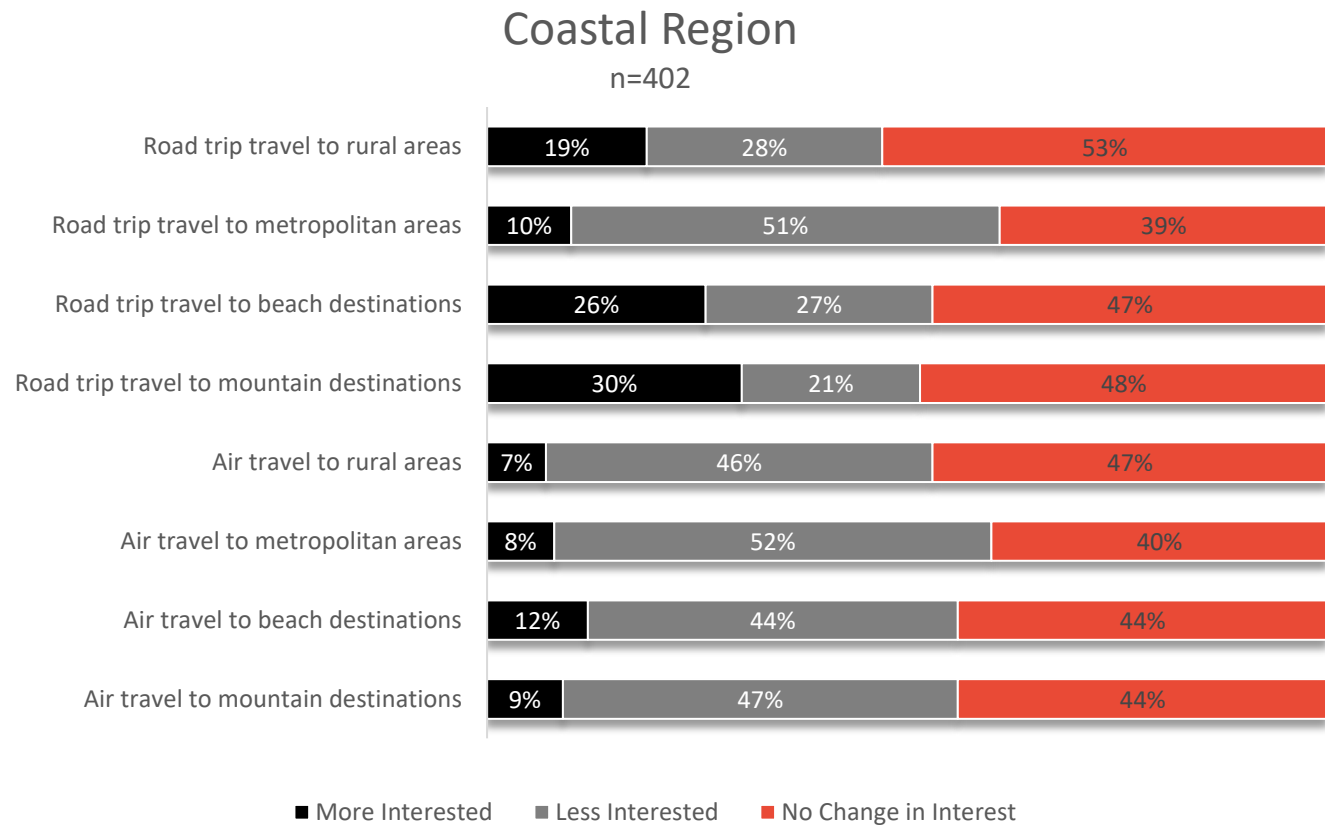
Q5b: Using a scale of 1 (not at all likely) to 5 (extremely likely), as a result of the news of an effective vaccine to be available eminently, please indicate how likely you are to travel overnight within North Carolina in the next 6 months.
(Question added W3)

COVID-19 Has Made North Carolina Residents Less Interested in Most Travel, Particularly Air Travel



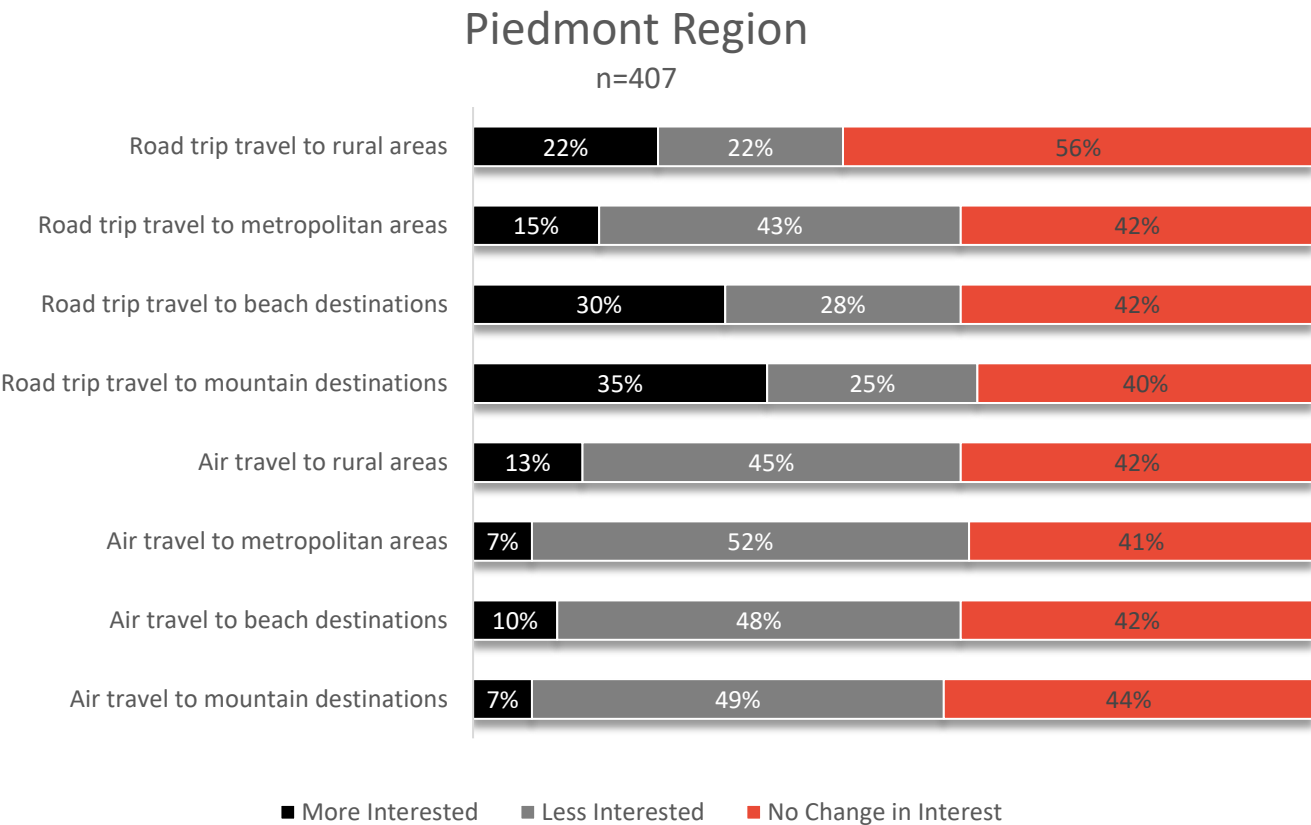
Q5a: Has COVID-19 changed your interest level in ach of the following types of trips? (Question added W2)

Impact of COVID-19 on Air and Auto Trips



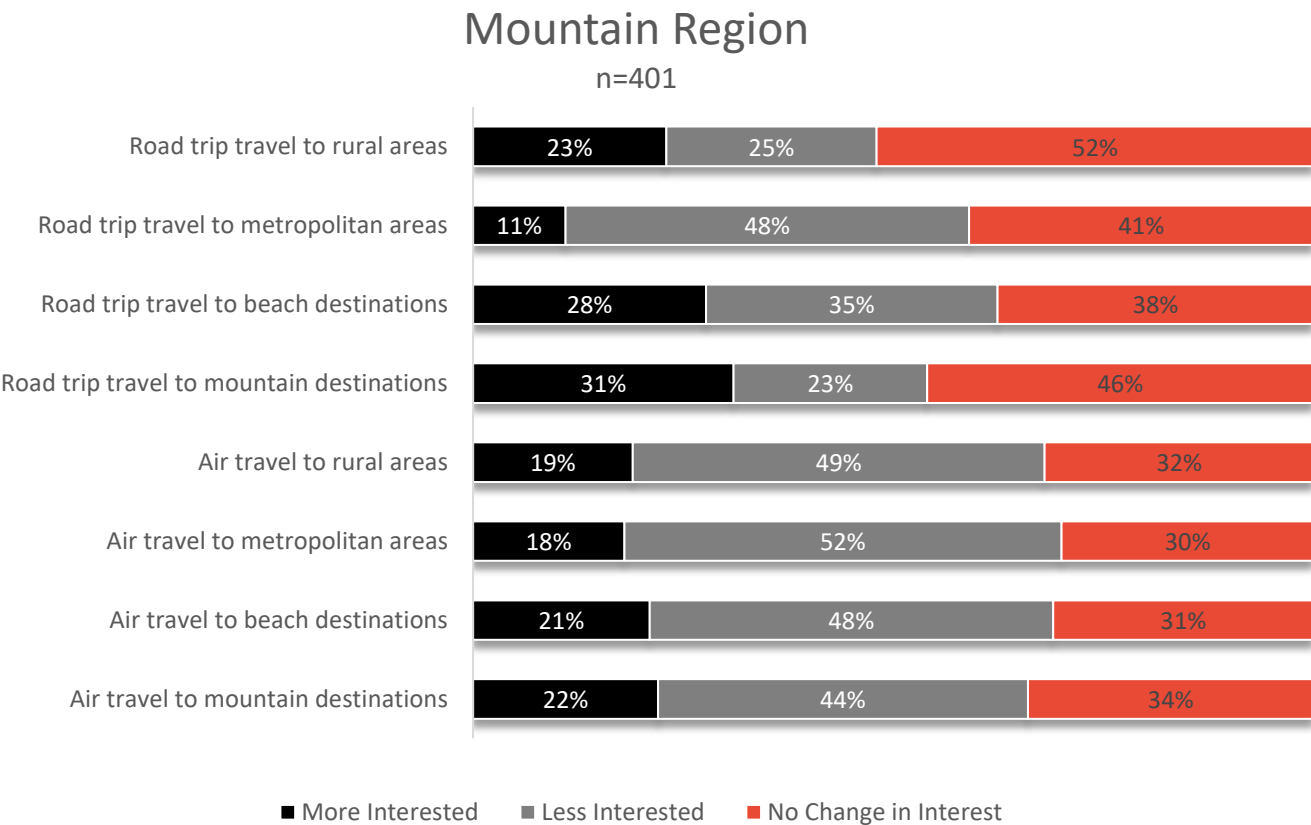
Q5a: Has COVID-19 changed your interest level in ach of the following types of trips? (Question added W2)

Impact of COVID-19 on Air and Auto Trips



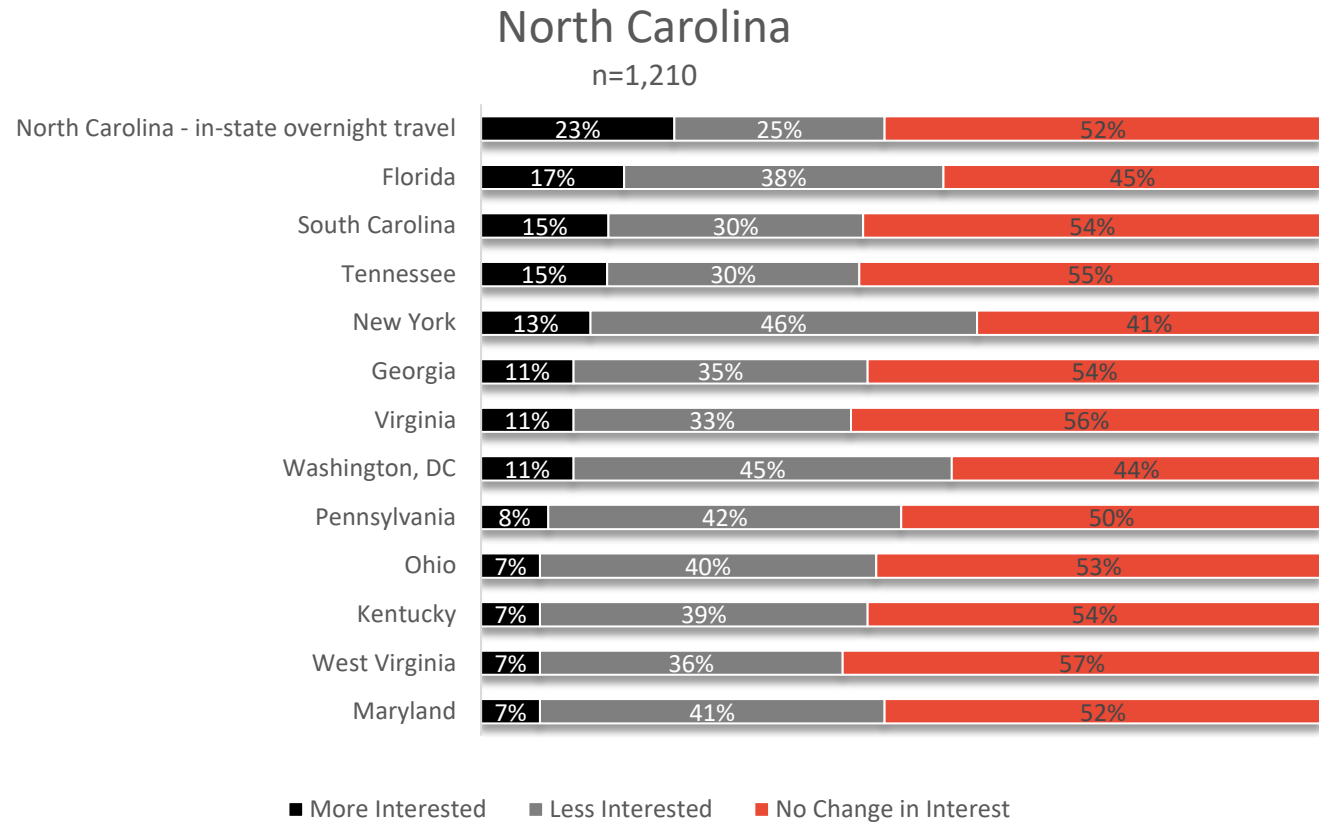
Q5a: Has COVID-19 changed your interest level in ach of the following types of trips? (Question added W2)

Impact of COVID-19 on Air and Auto Trips



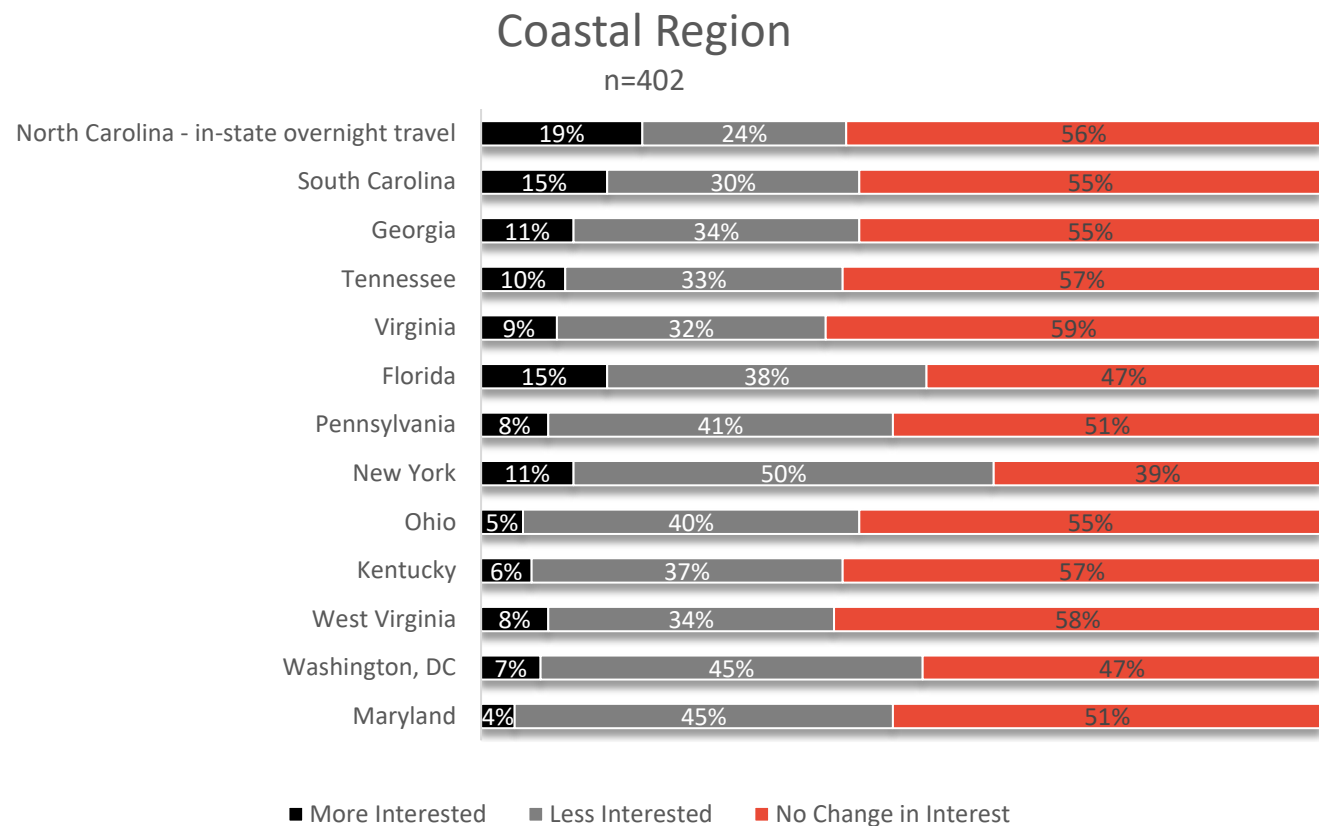
Q5a: Has COVID-19 changed your interest level in ach of the following types of trips? (Question added W2)

Residents are More Interested in Overnight Travel Within North Carolina and Less Interested in States with High Levels of COVID-19



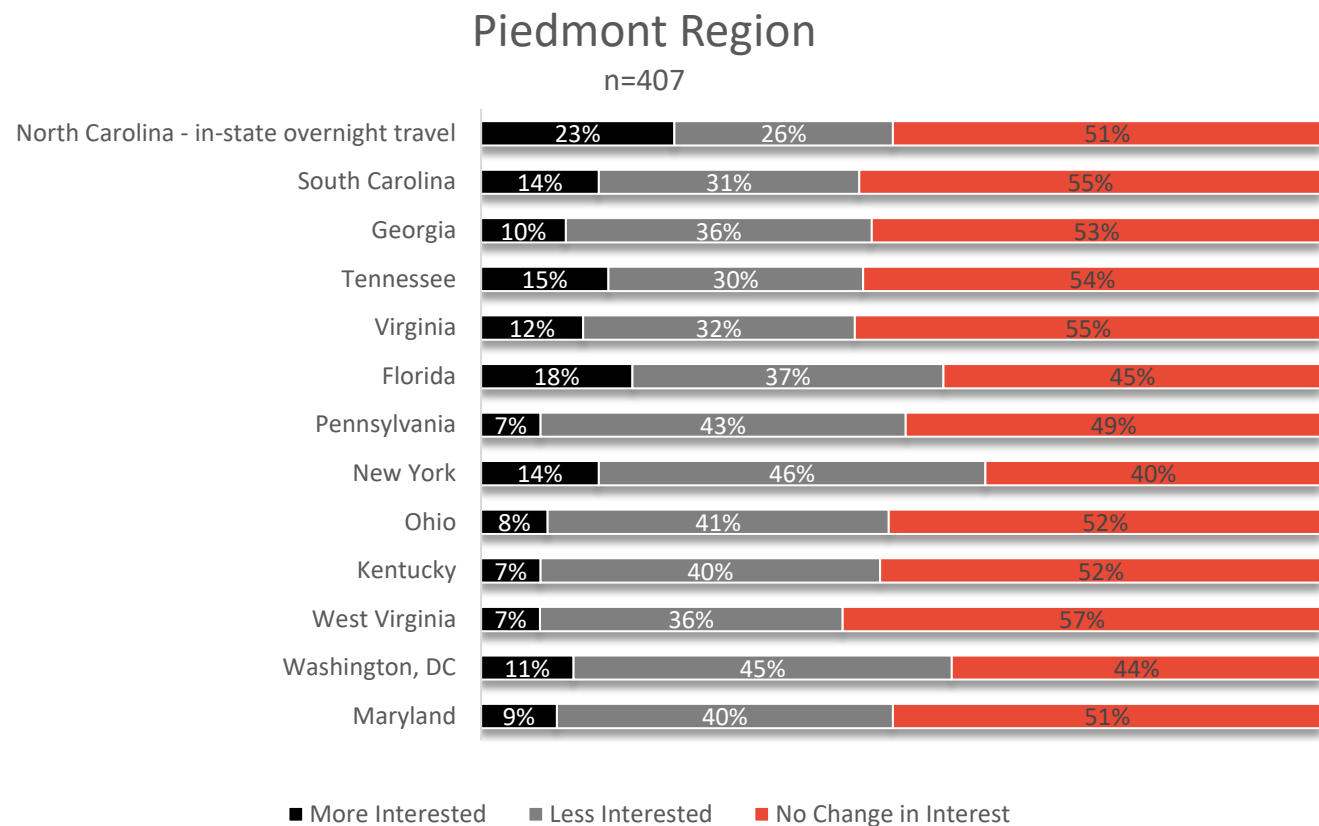
Q5b: Has COVID-19 changed your interest in visiting each of the following states? (Question added W2)

Impact of COVID-19 on Interest in Visiting Other States



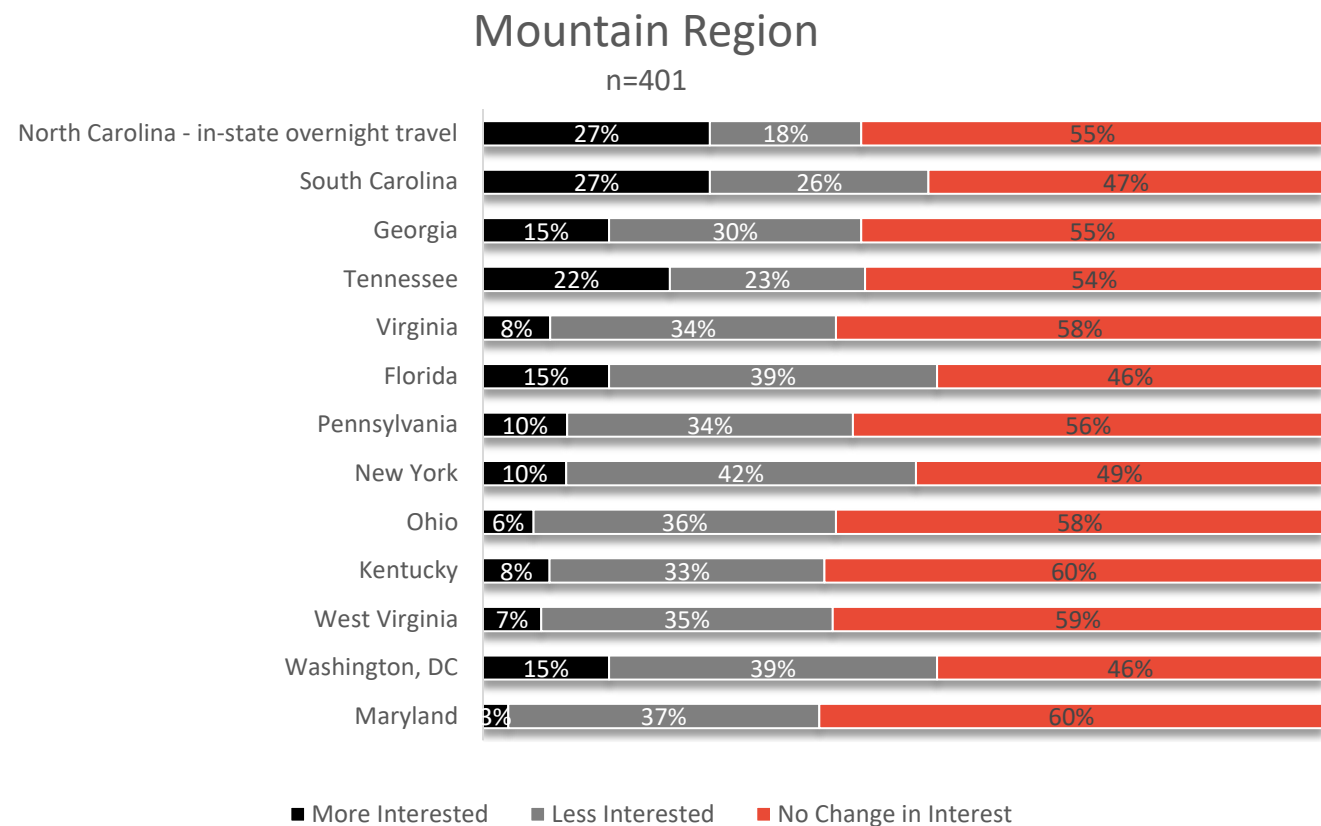
Q5b: Has COVID-19 changed your interest in visiting each of the following states? (Question added W2)

Impact of COVID-19 on Interest in Visiting Other States



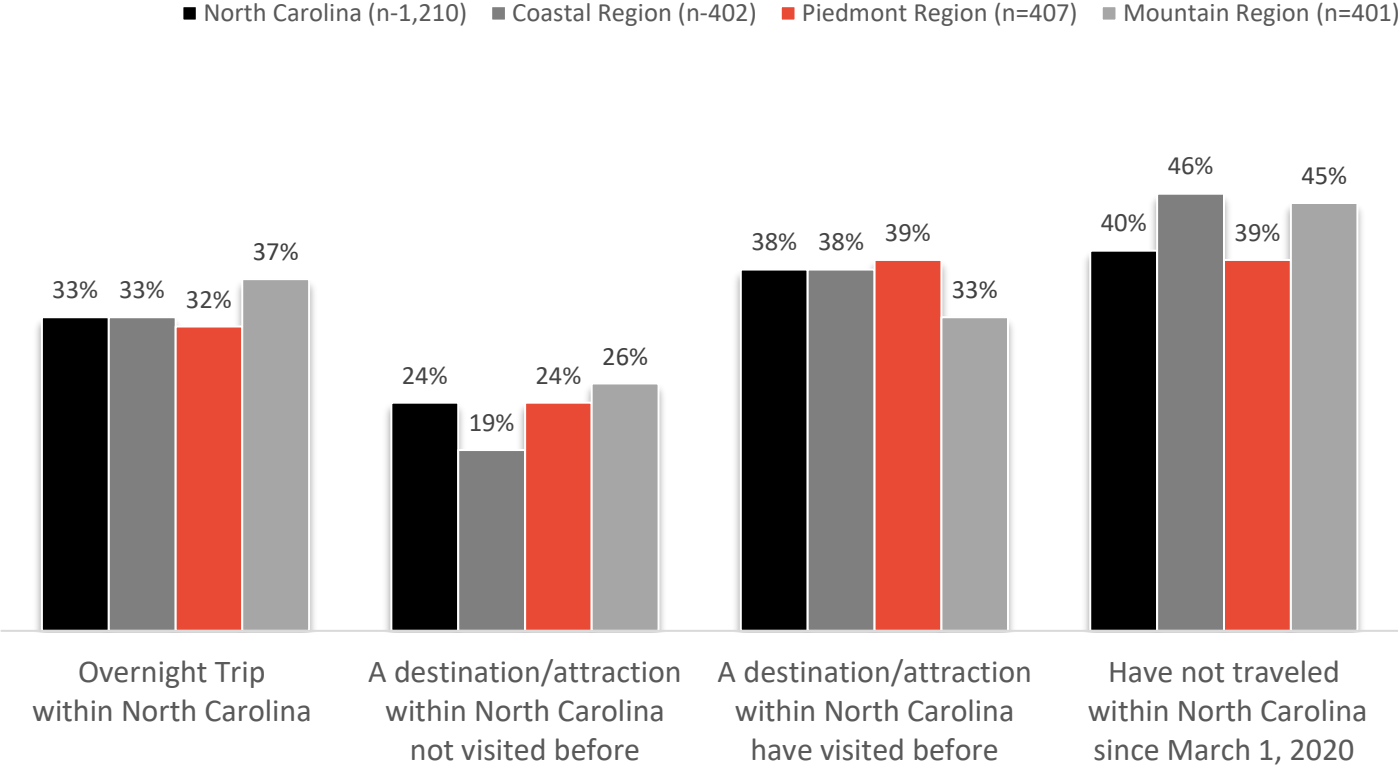
Q5b: Has COVID-19 changed your interest in visiting each of the following states? (Question added W2)

Impact of COVID-19 on Interest in Visiting Other States



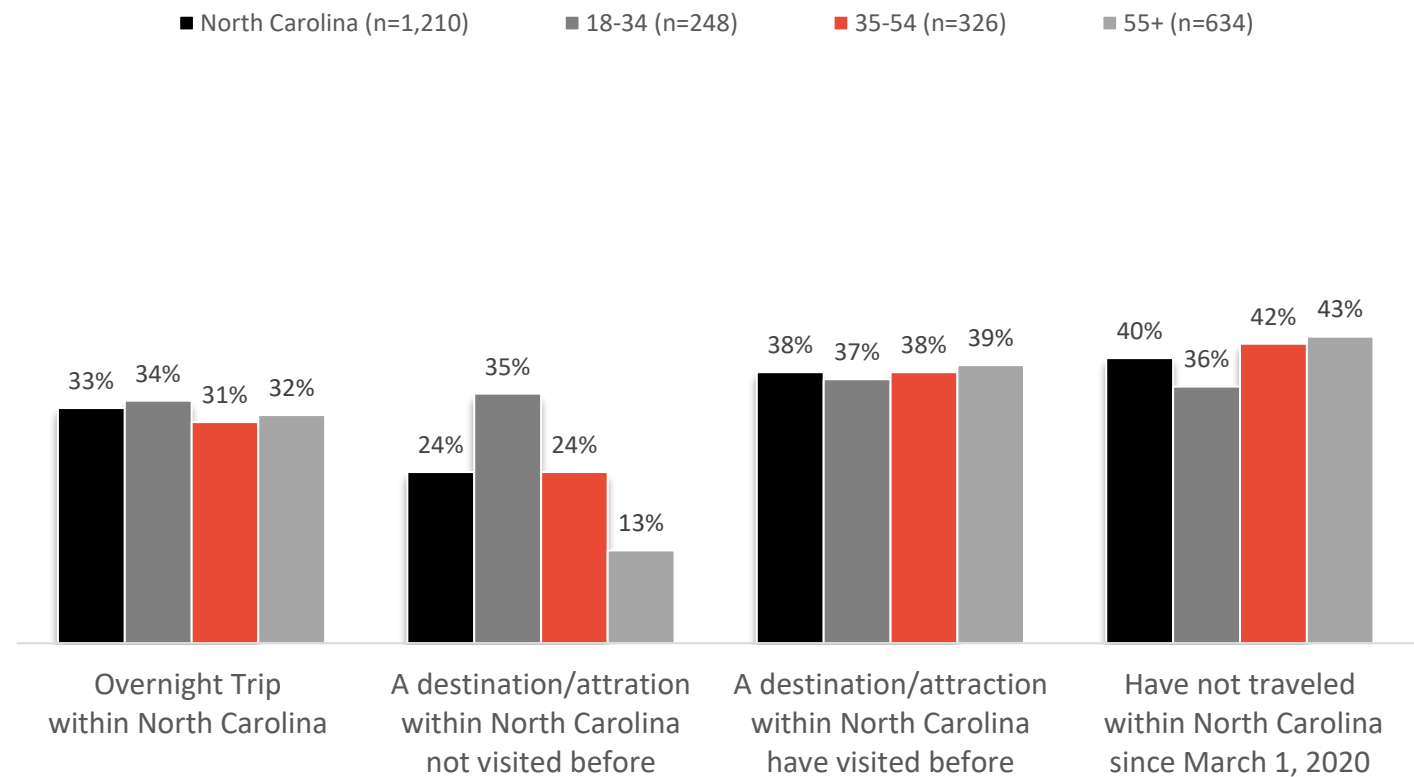
Q5b: Has COVID-19 changed your interest in visiting each of the following states? (Question added W2)

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



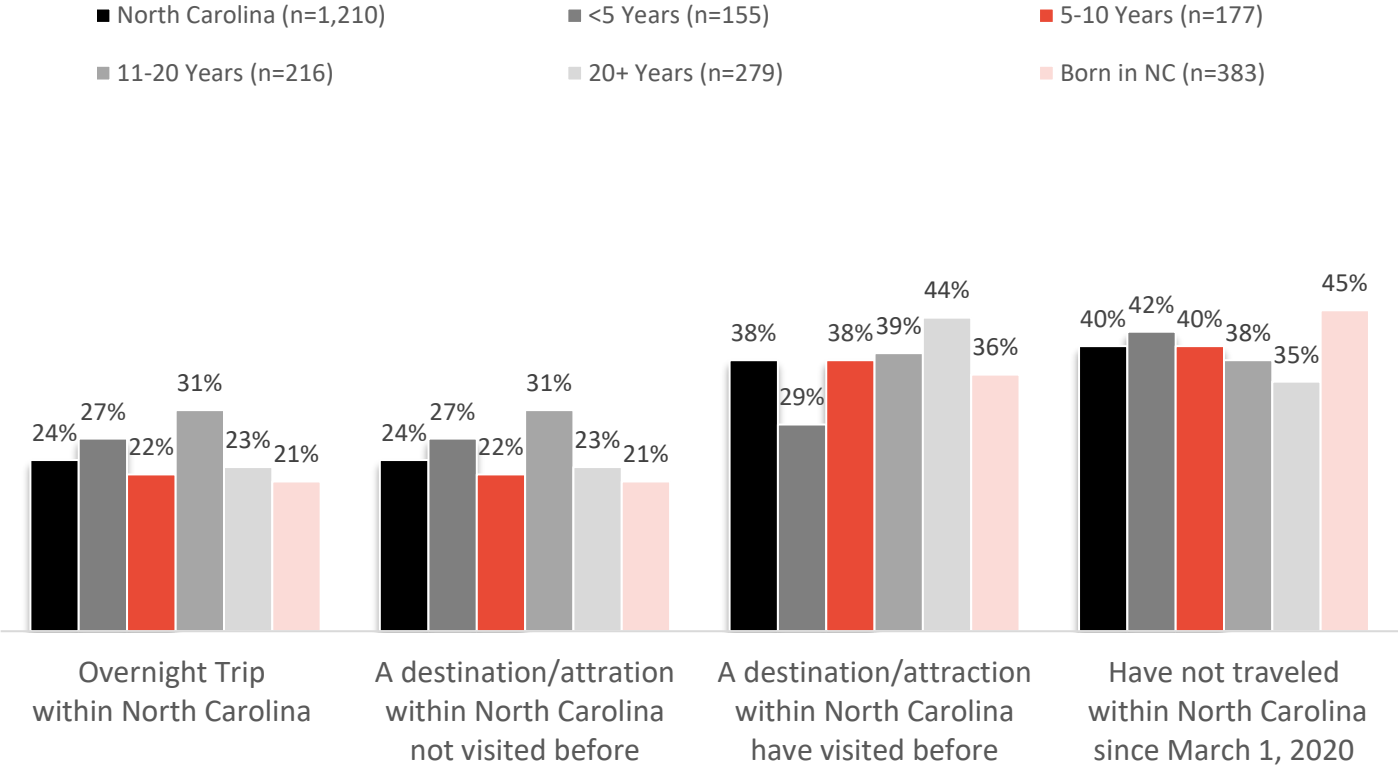
Q6a: Since March 1, 2020, have you taken any of the following types of trips? (Question added W2)

Younger Residents More Likely to Have Traveled Within North Carolina Since March 1, 2020



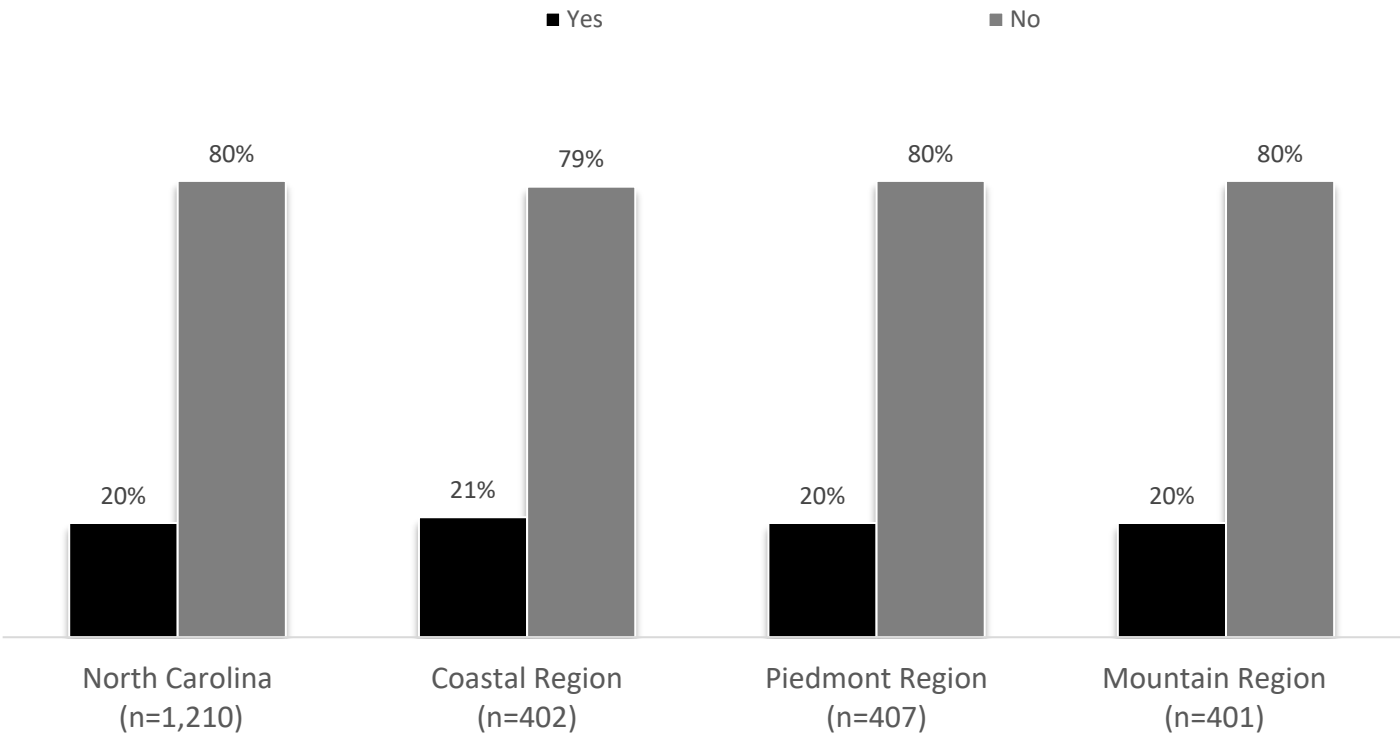
Q6a: Since March 1, 2020, have you taken any of the following types of trips? (Question added W2)

Residents Born in North Carolina Least Likely to Have Traveled Within North Carolina Since March 1, 2020



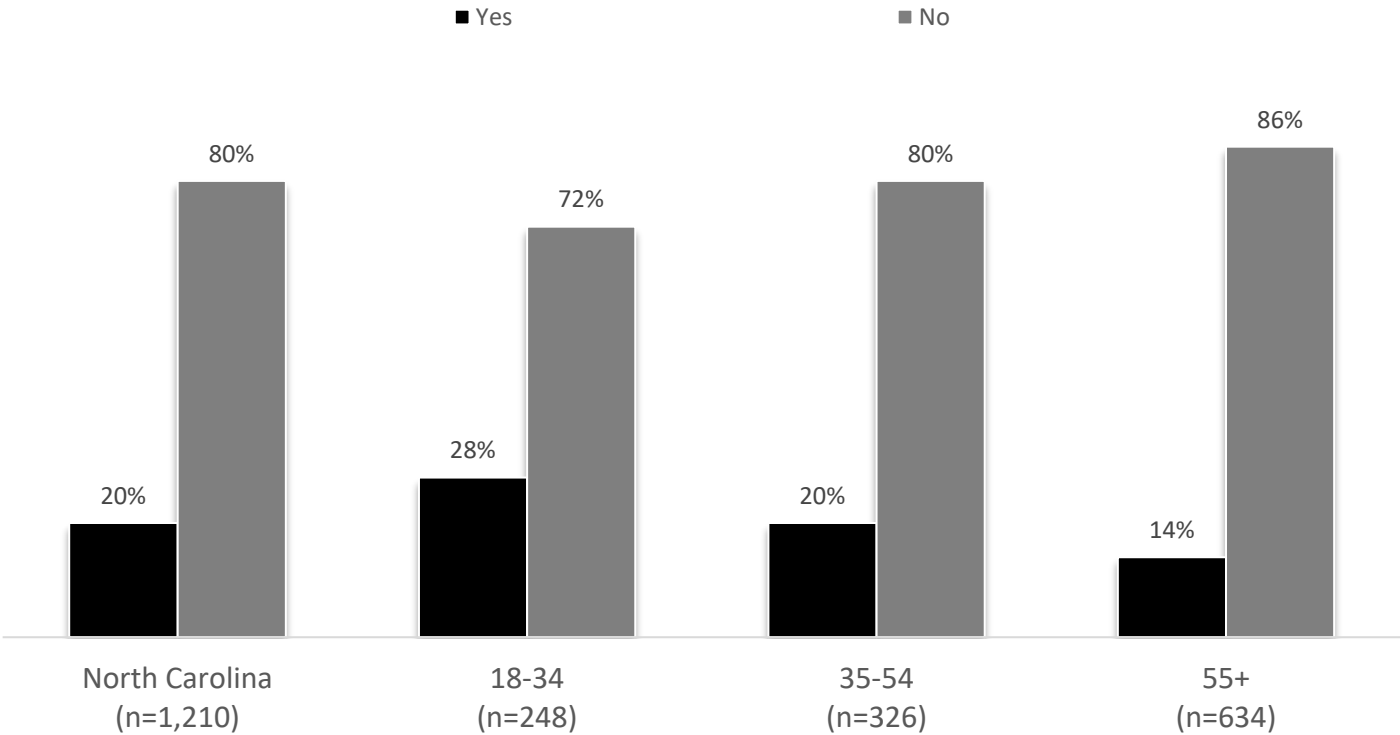
Q6a: Since March 1, 2020, have you taken any of the following types of trips? (Question added W2)

Eight in Ten Residents Do Not Have An Overnight Trip Within North Carolina Planned by December 31,2020 – Up 10% From Wave 2



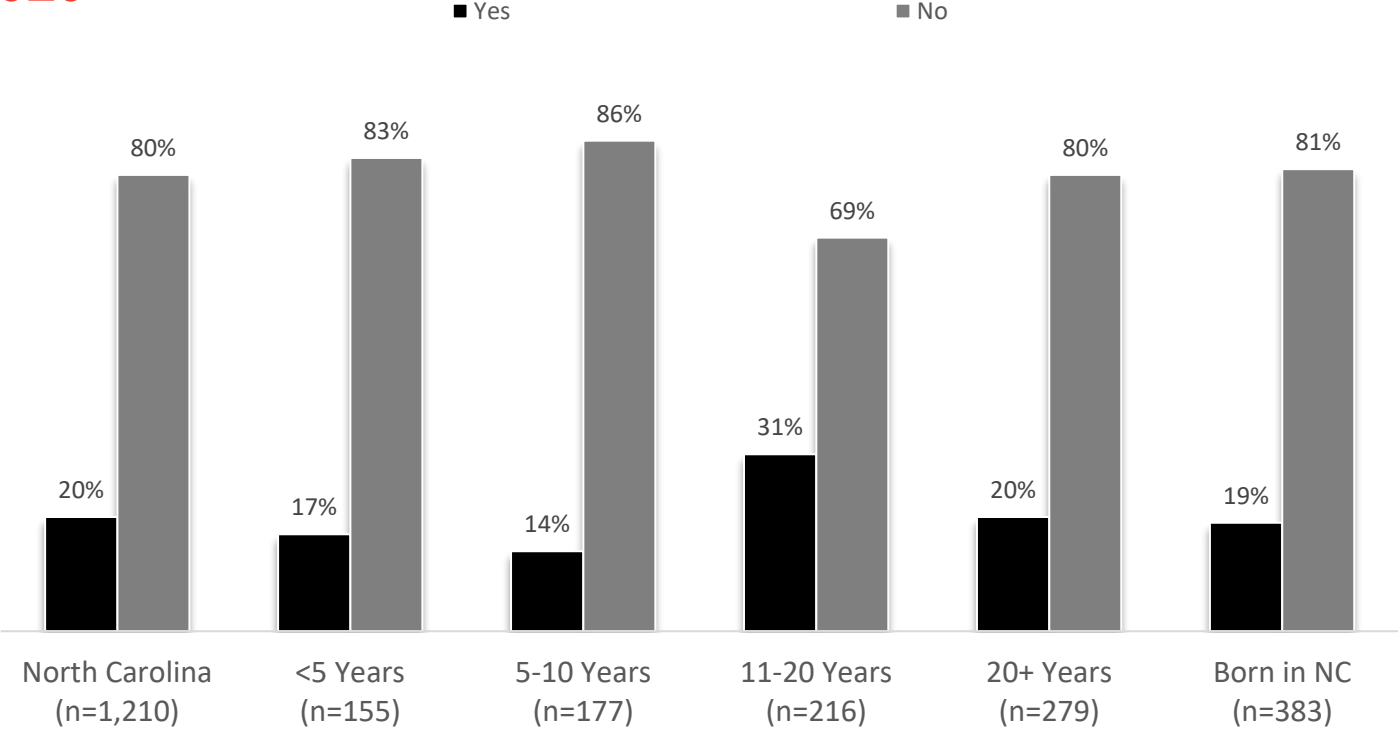
Q7a: Do you currently have an overnight trip within North Carolina planned between now and December 31, 2020? (Question added W2)

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)

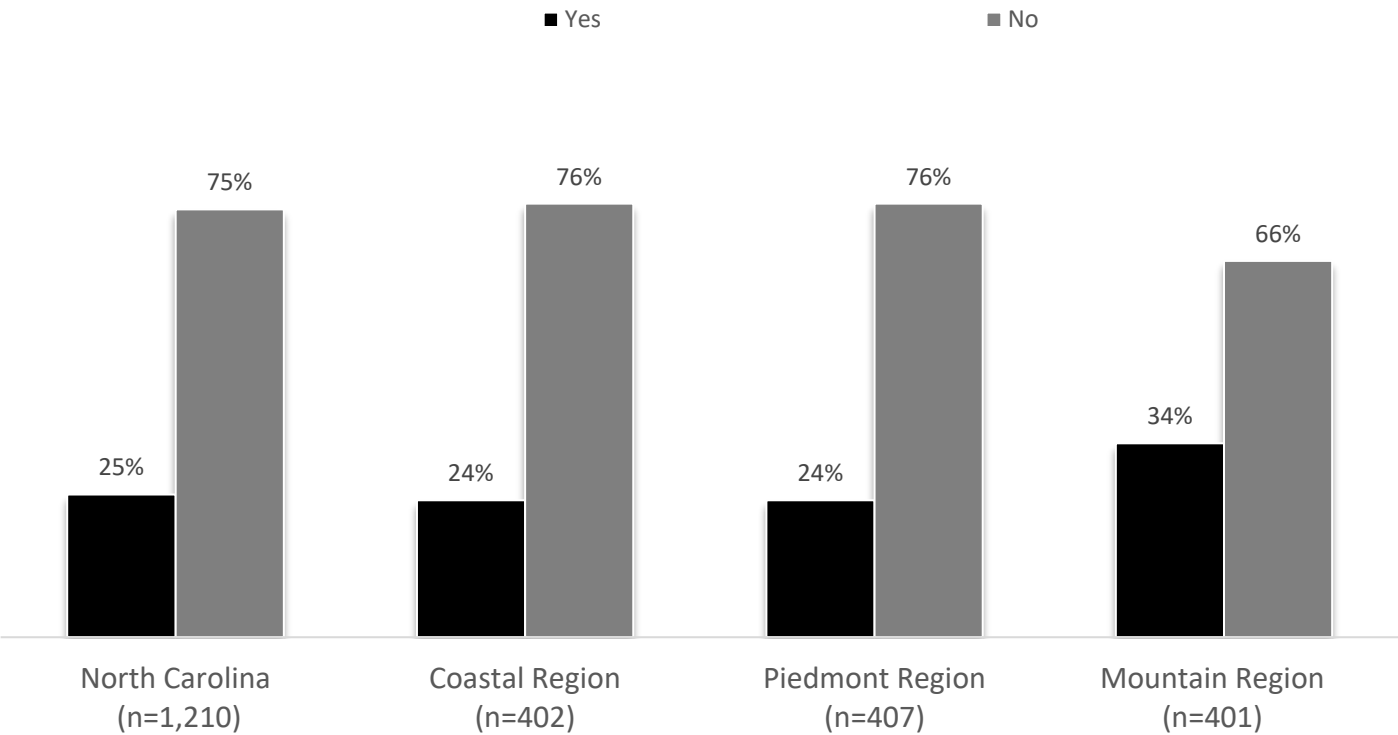
Those Who Have Lived in North Carolina 11-20 Years Most Likely to Have Plans for an Overnight Trip Within North Carolina December 31, 2020



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

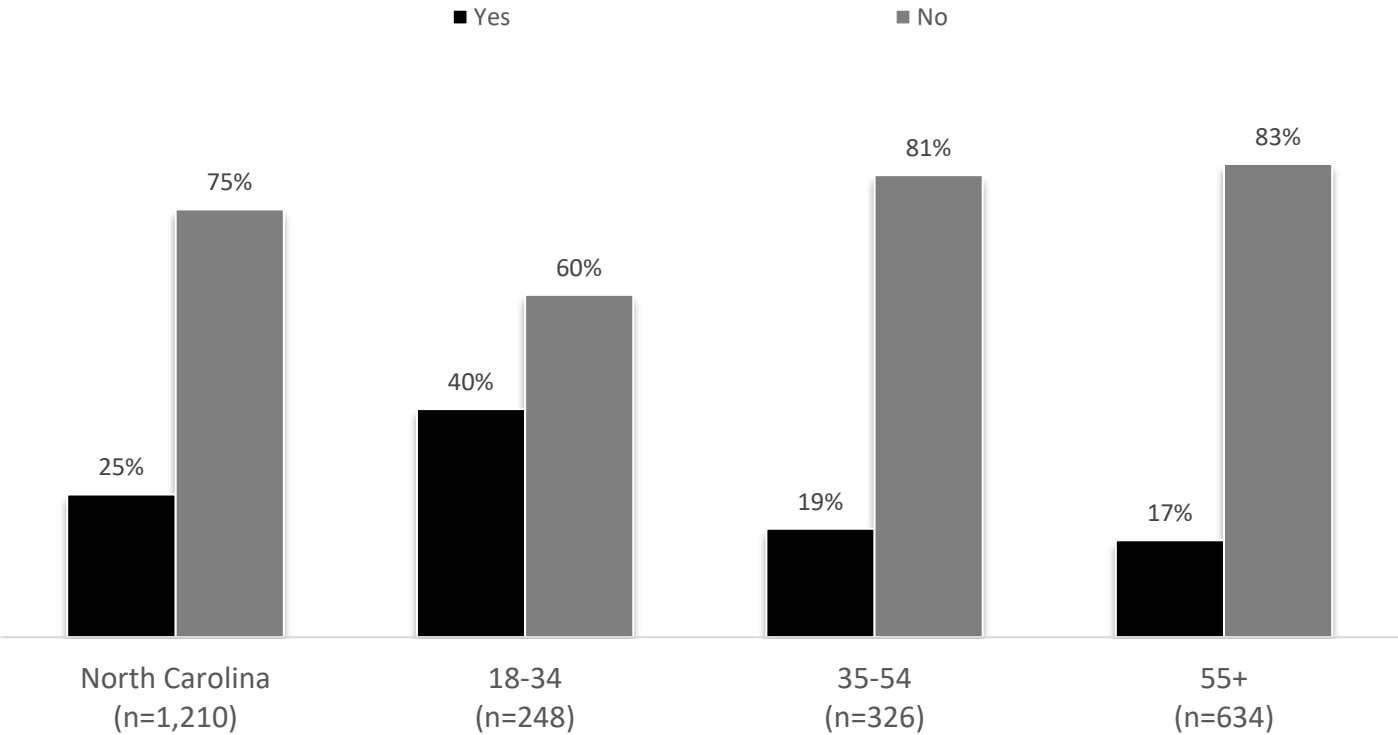
Count On Me NC

Residents in the Mountain Region are Most Likely to Have Heard of the *Count On Me NC* Health Safety Campaign



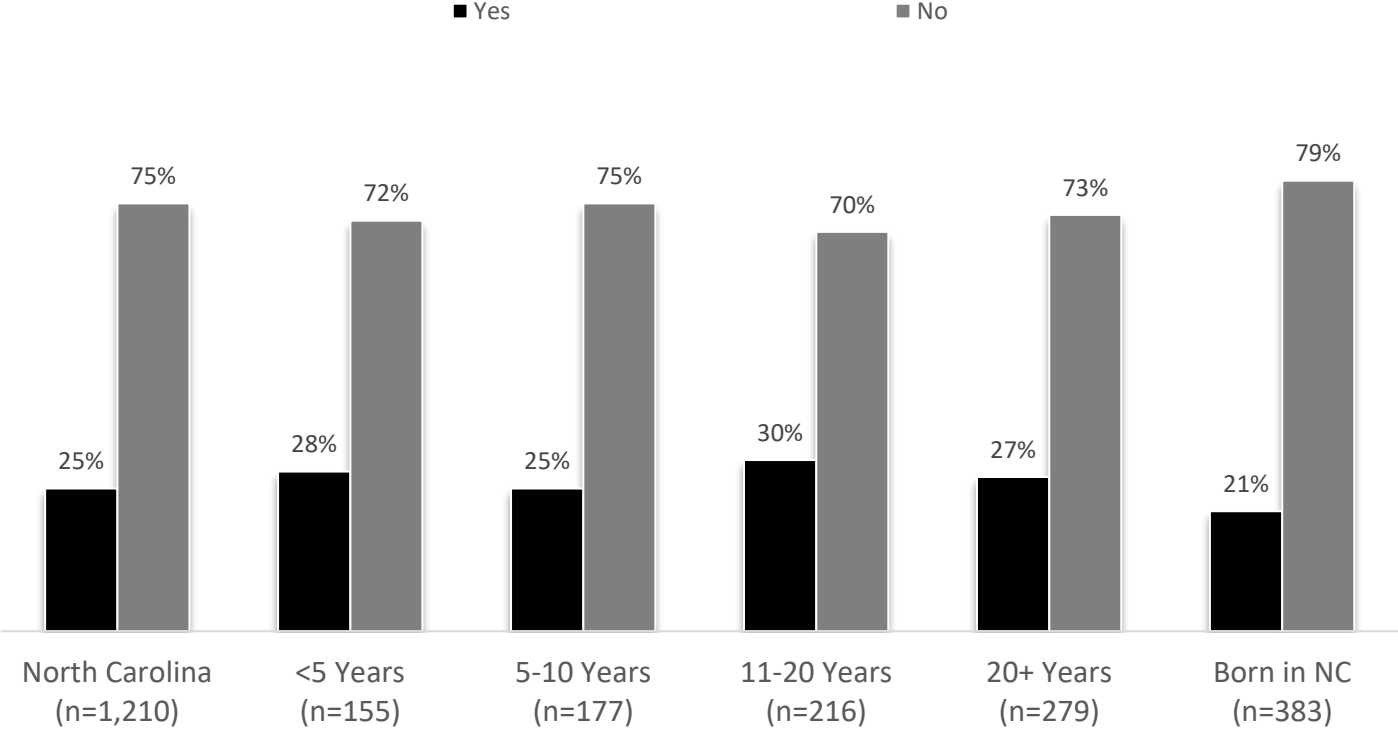
Q8a: Are you aware of the *Count On Me NC* health safety campaign? (Question added W2)

Younger Residents Much More Likely to Have Heard of the Count On Me NC Health Safety Campaign Than Those 35 and Older



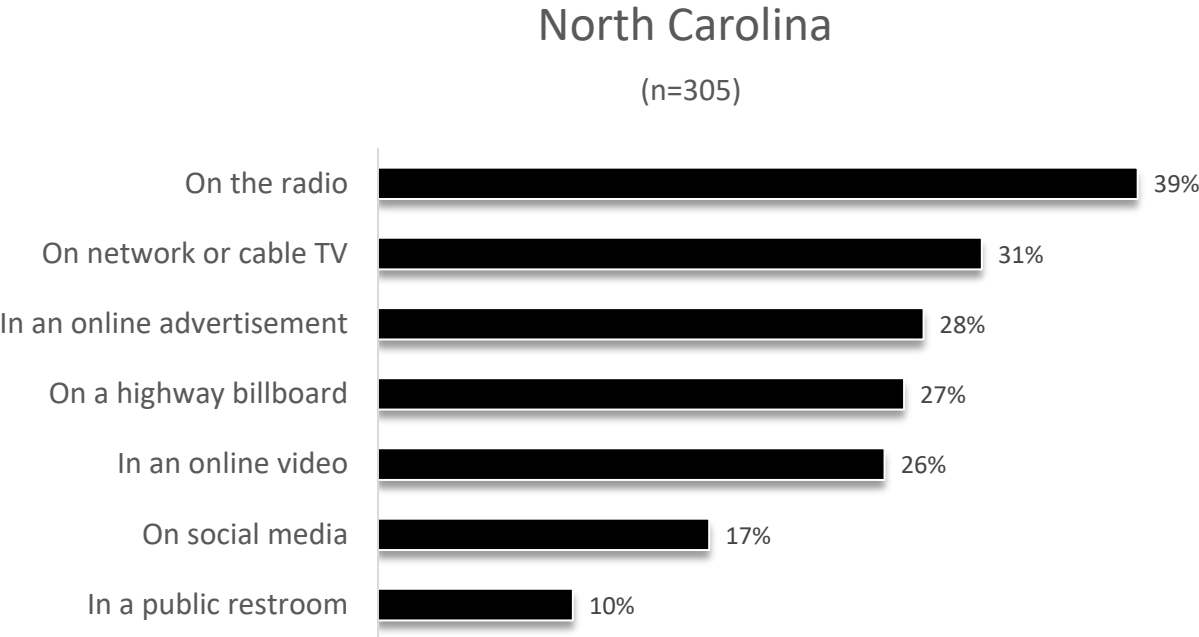
Q8a: Are you aware of the *Count On Me NC* health safety campaign? (Question added W2)

Those Who Have Lived in North Carolina 11-20 Years Most 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)

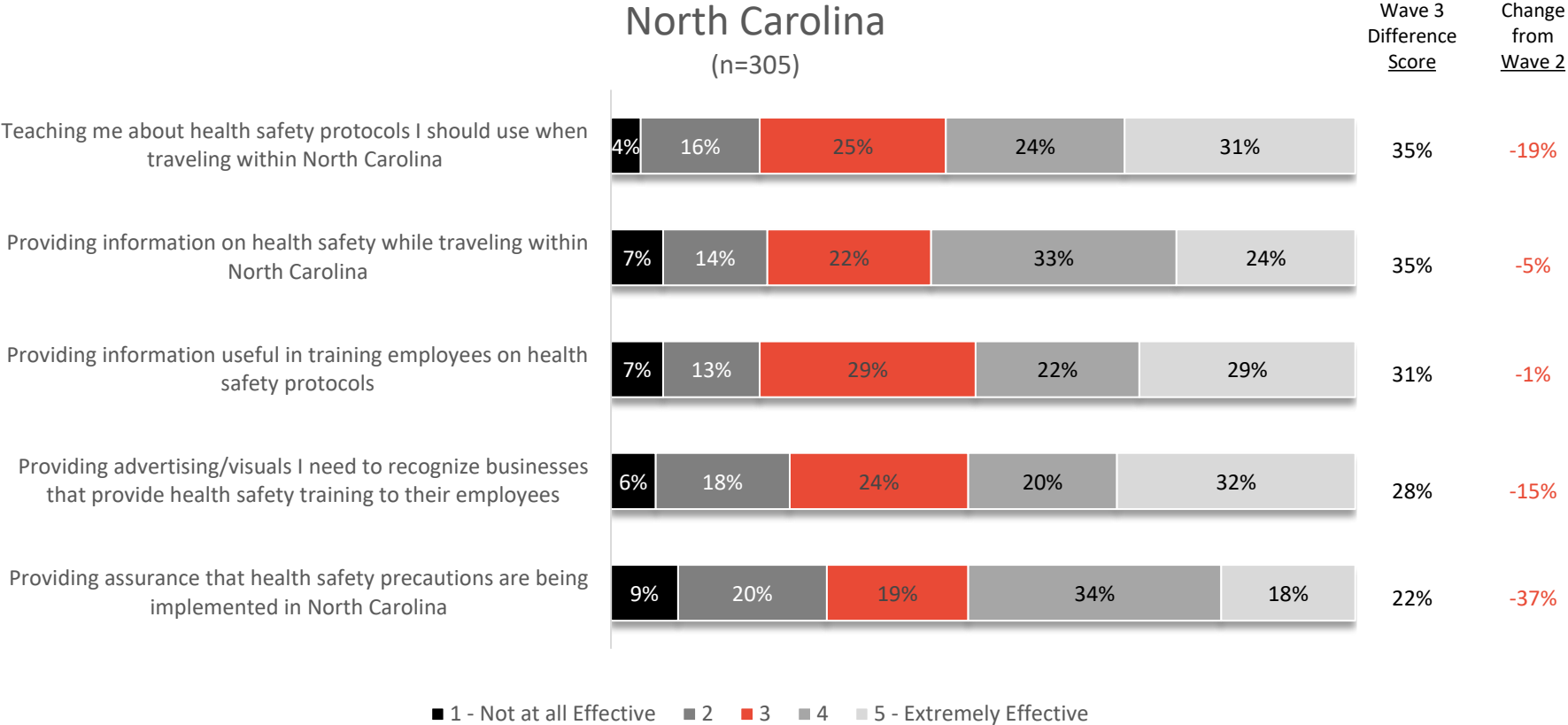
Four in 10 of Those Aware of the *Count On Me NC* Health Safety Advertising Heard it on the Radio



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, but Less So Than by Wave Two Respondents

North Carolina (n=305)

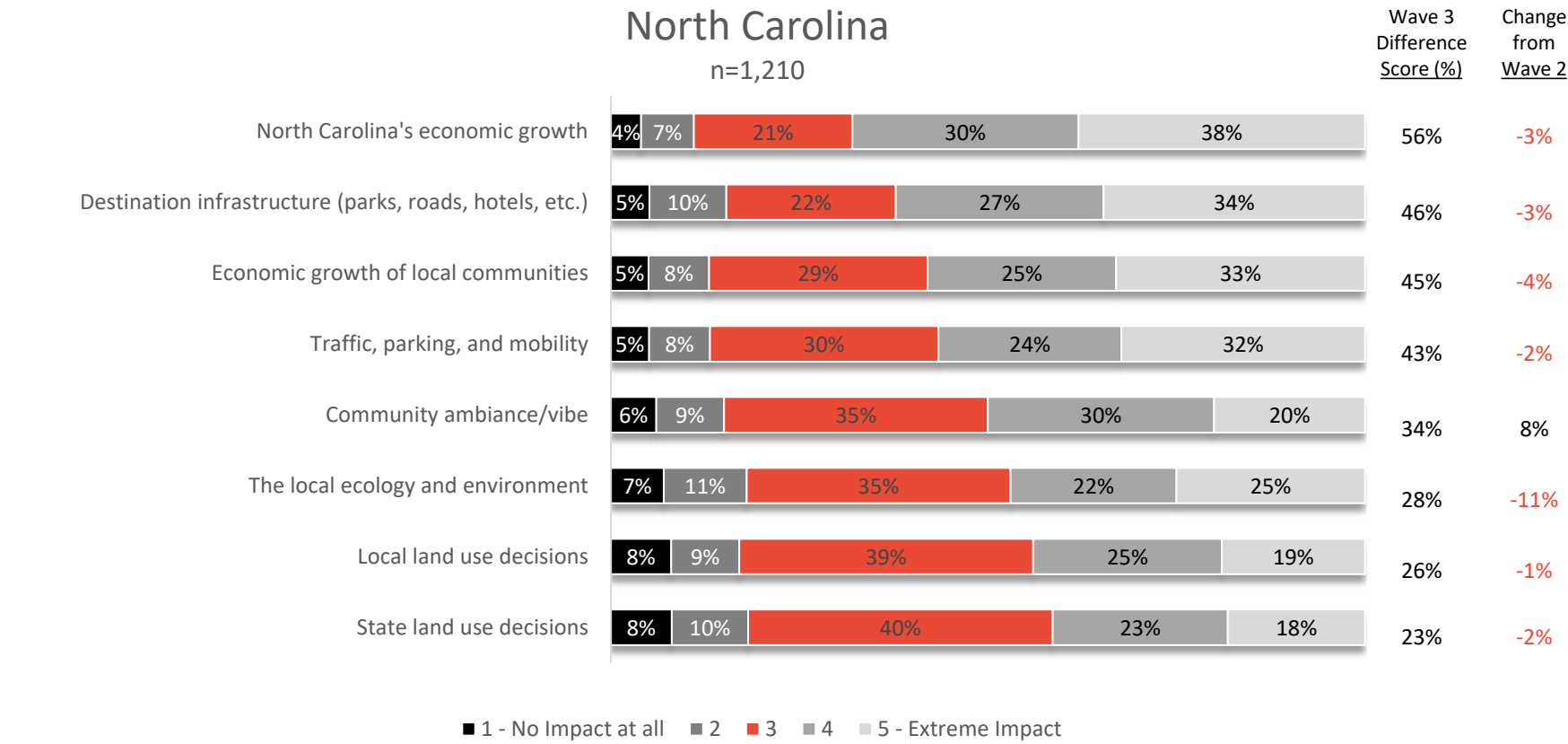


Q9a: Using a scale of 1 (not at all effective) to 5 (extremely effective), please provide a rating of how effective you think the *Count On Me NC* advertising you have see is at each of the following? (Question added W2)

Four horizontal dotted lines of varying lengths, starting from the right edge and extending leftwards, creating a staircase effect.

Impact of Tourism

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



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.

Older Residents Think Tourism Has More of an Impact Than Do Younger Residents

North Carolina

Difference Scores (%)

	18-34 n=248	35-54 n=326	55+ n=634
North Carolina's economic growth	46	50	69
Economic growth of local communities	34	34	64
Destination infrastructure (parks, roads, hotels, etc.)	39	37	60
Community ambiance/vibe	23	36	42
The local ecology and environment	29	18	36
Traffic, parking, and mobility	43	35	49
State land use decisions	23	11	34
Local land use decisions	32	16	31

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.

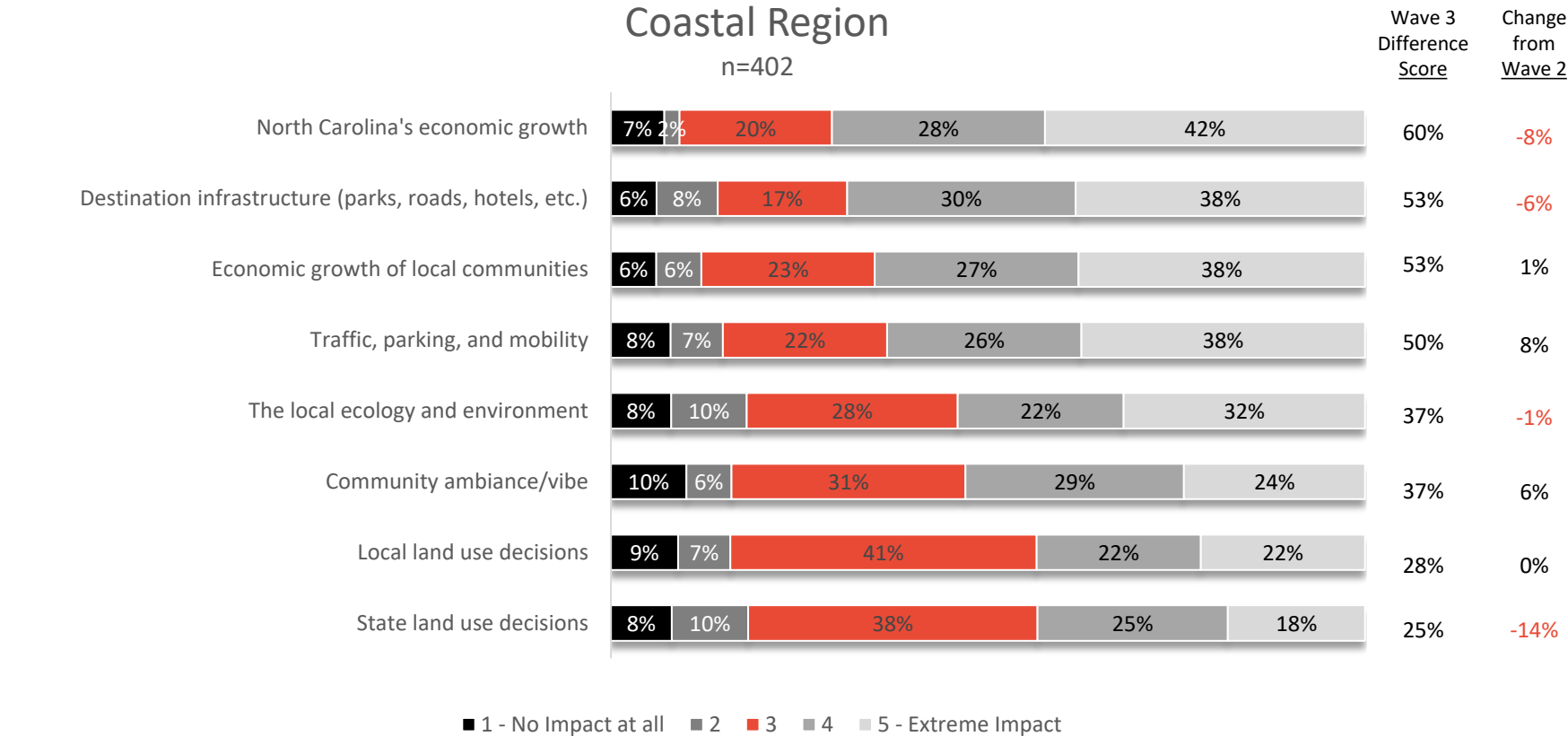
Those Who Have Lived in North Carolina the for the Shortest Time Think Tourism Has the Least Impact on the State

North Carolina
Difference Scores (%)

	<5 Years n=155	5-10 Years n=177	11-20 Years n=216	20+ Years n=279	Born in NC n=383
North Carolina's economic growth	18	41	69	68	57
Economic growth of local communities	25	41	58	56	39
Destination infrastructure (parks, roads, hotels, etc.)	-3	26	69	60	48
Community ambiance/vibe	10	21	44	43	35
The local ecology and environment	-5	30	42	33	28
Traffic, parking, and mobility	13	36	53	54	41
State land use decisions	1	21	44	27	21
Local land use decisions	1	18	40	33	27

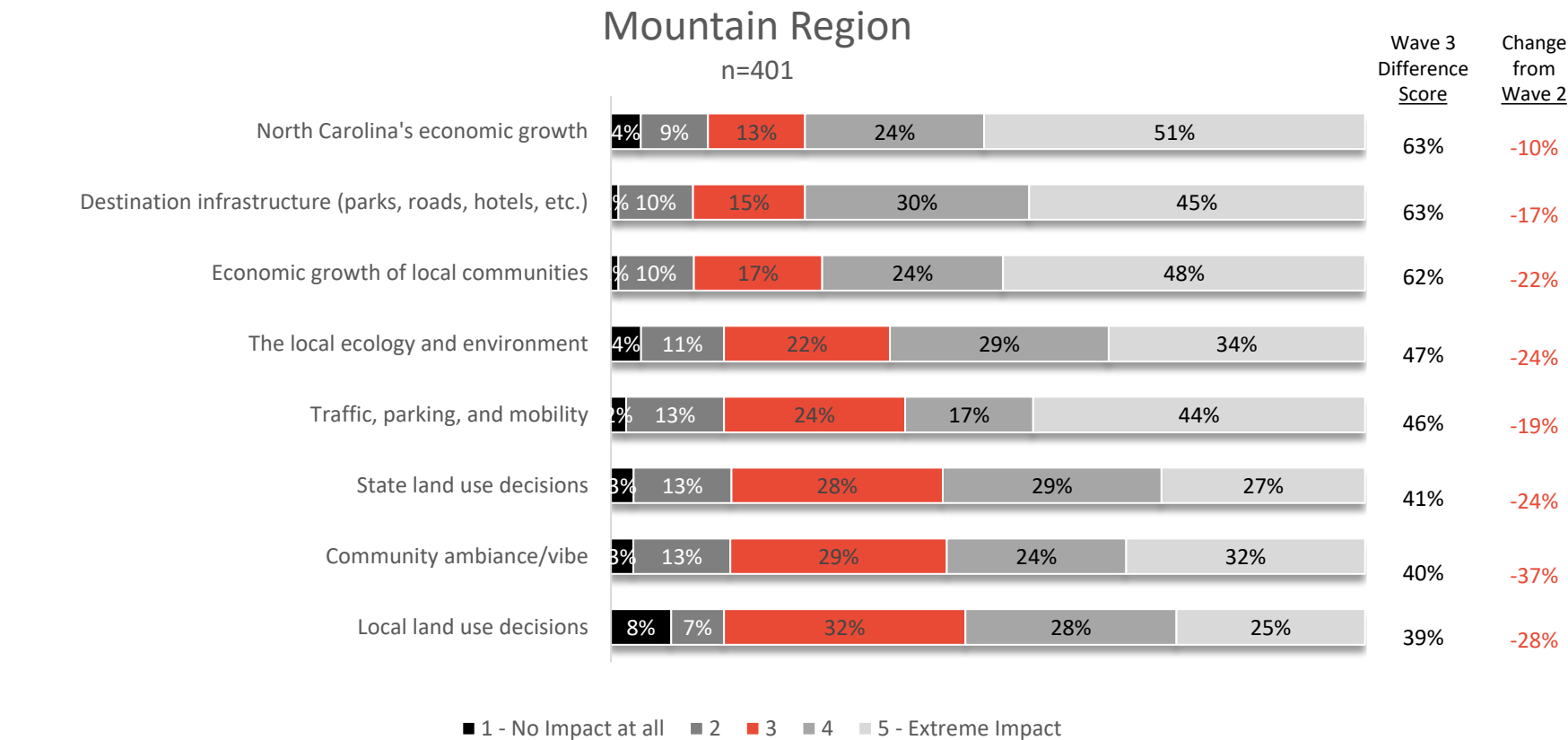
Q14: Using a scale of 1 (no impact at all) to 5 (extreme impact), please indicate how much impact you think tourism has on each of the following.

Perceived Impact of Tourism

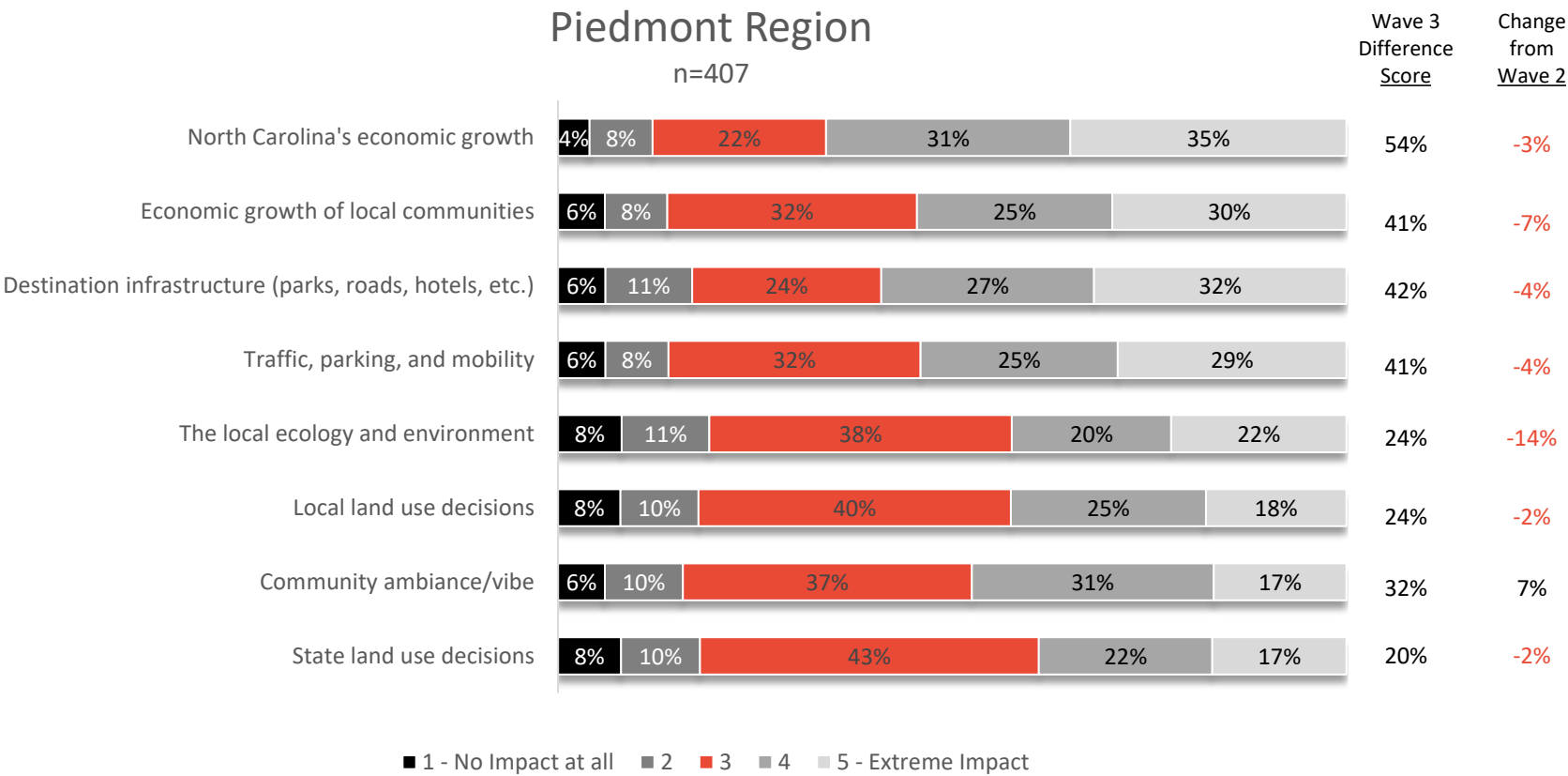


Q14: Using a scale of 1 (no impact at all) to 5 (extreme impact), please indicate how much impact you think tourism has on each of the following.

Perceived Impact of Tourism



Perceived Impact of Tourism

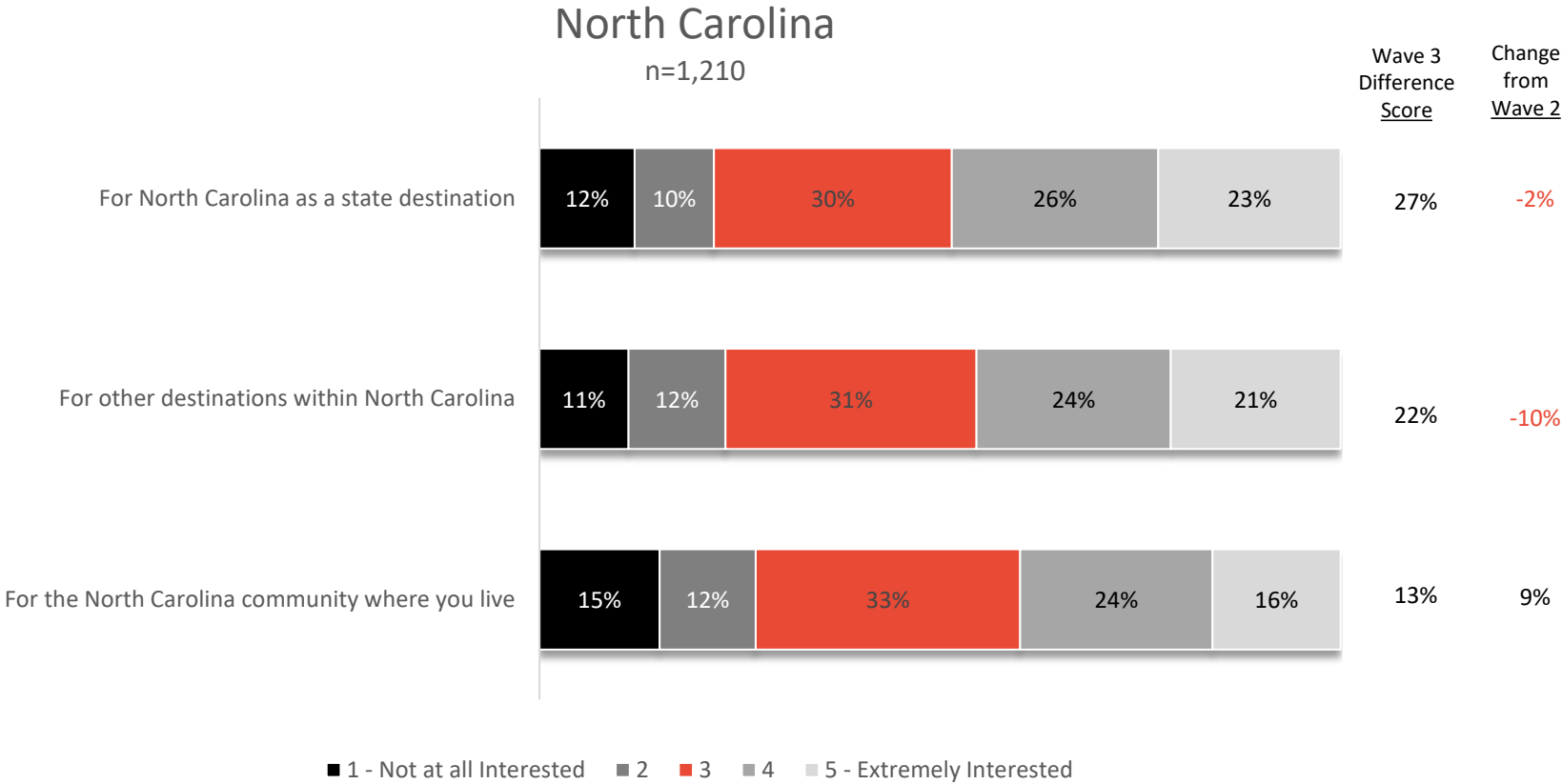


Q14: Using a scale of 1 (no impact at all) to 5 (extreme impact), please indicate how much impact you think tourism has on each of the following.

Four horizontal rows of white dots in the top right corner, with lengths decreasing from top to bottom.

Destination Marketing

Residents Are Most Interested in Seeing Advertising For North Carolina as a State Destination



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=248	35-54 n=326	55+ n=634
For other destinations within North Carolina	27	17	23
For North Carolina as a state destination	33	22	25
For the North Carolina community where you live	26	11	3

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

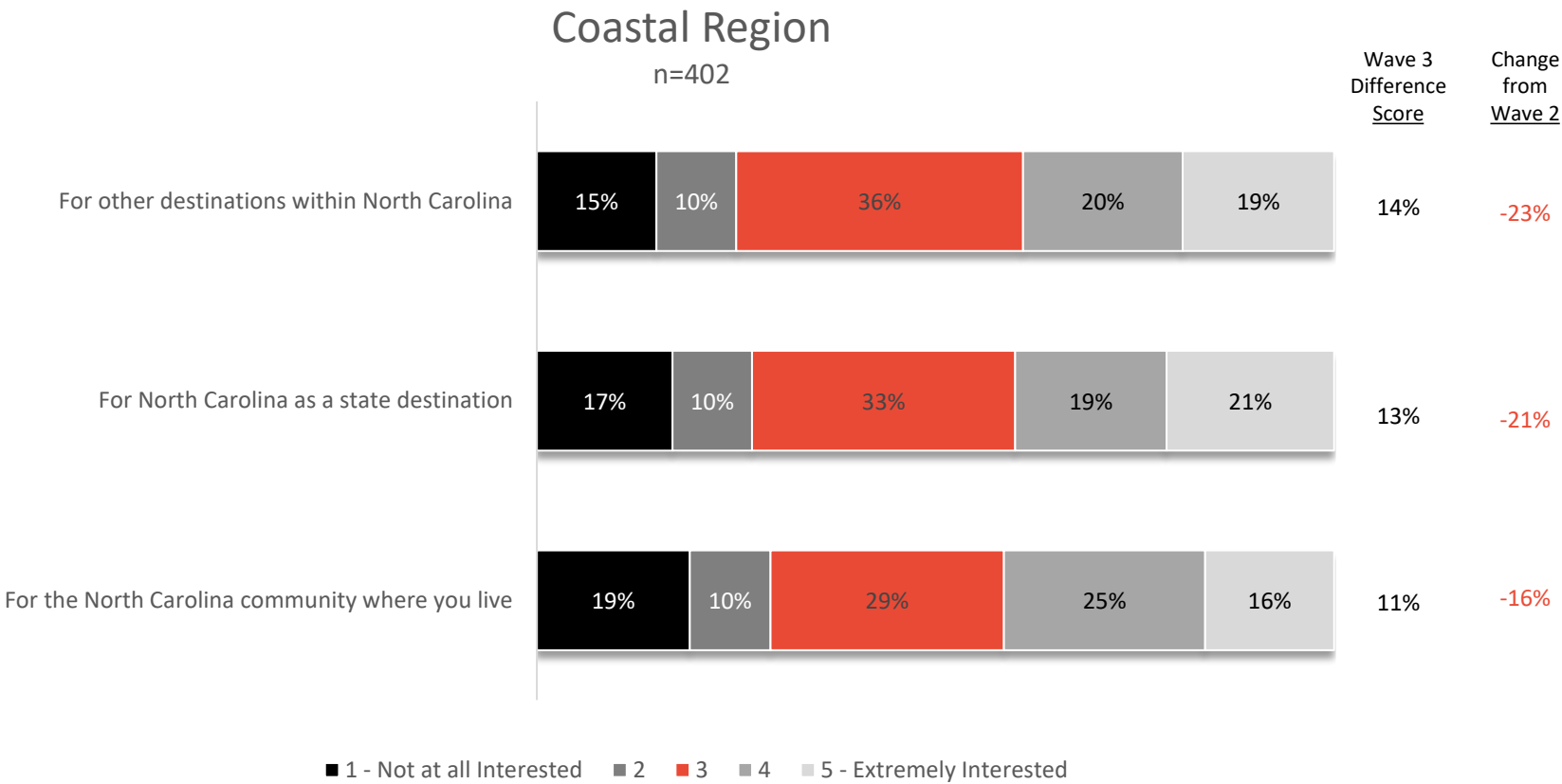
North Carolina

Difference Scores (%)

	<5 Years n=155	5-10 Years n=177	11-20 Years n=216	20+ Years n=279	Born in NC n=383
For other destinations within North Carolina	-6	7	21	41	23
For North Carolina as a state destination	4	16	34	39	24
For the North Carolina community where you live	3	2	10	23	13

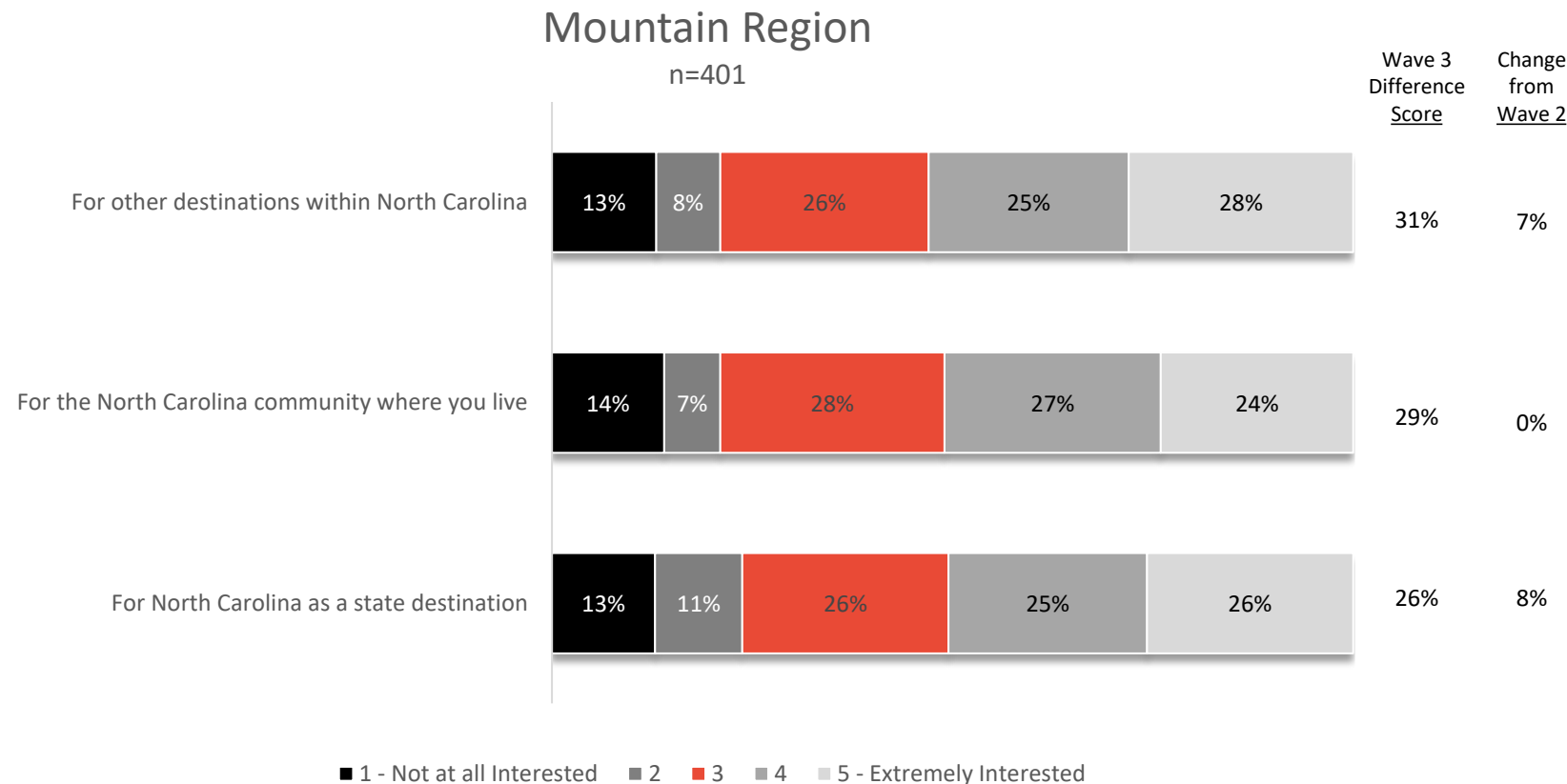
Q15: Using a scale of 1 (not at all interested) to 5 (extremely interested), how interested are you to see promotional advertising for North Carolina as a destination or other destinations within North Carolina?

Interest in Seeing Promotional Advertising



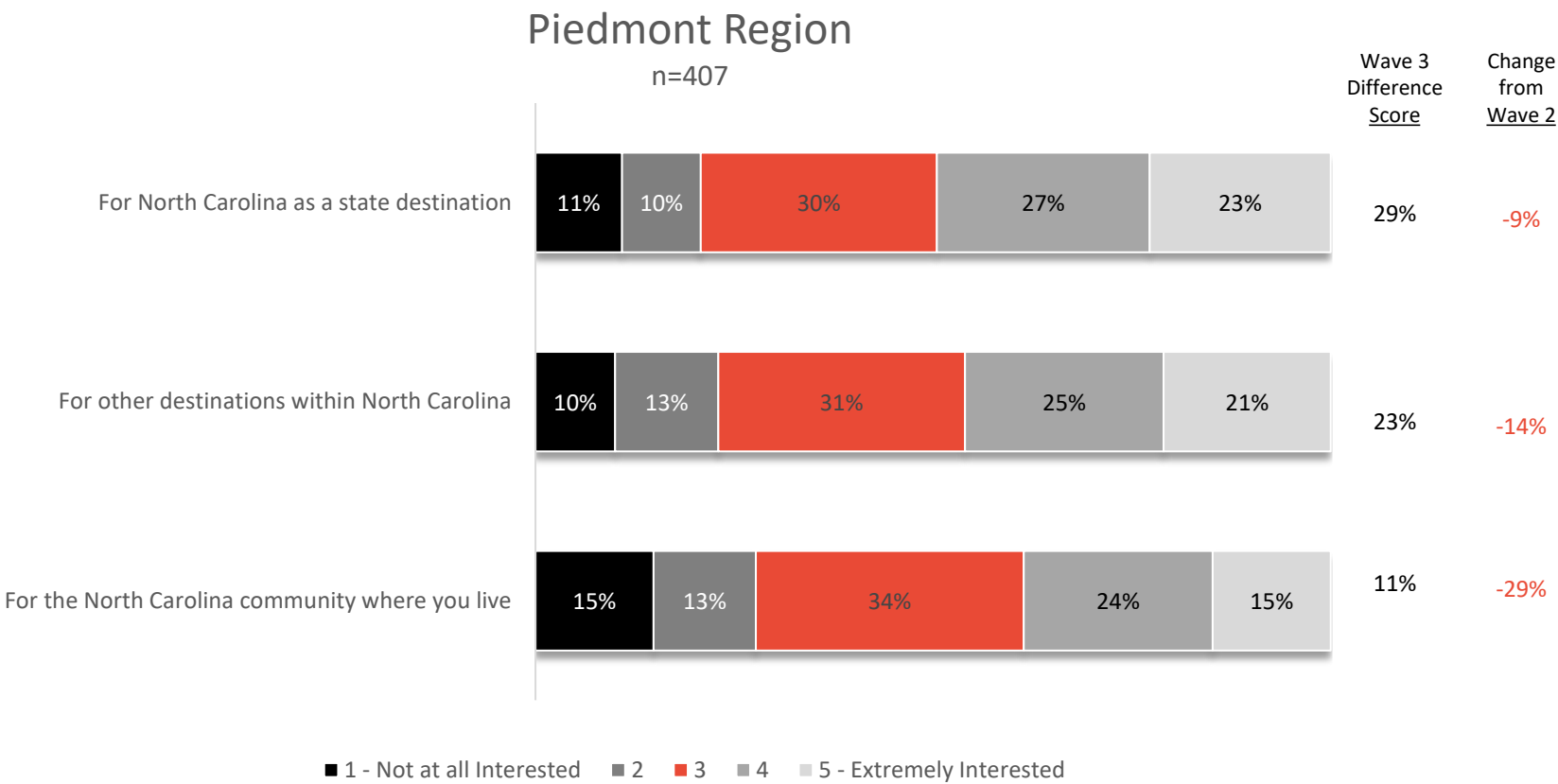
Q15: Using a scale of 1 (not at all interested) to 5 (extremely interested), how interested are you to see promotional advertising for North Carolina as a destination or other destinations within North Carolina?

Interest in Seeing Promotional Advertising



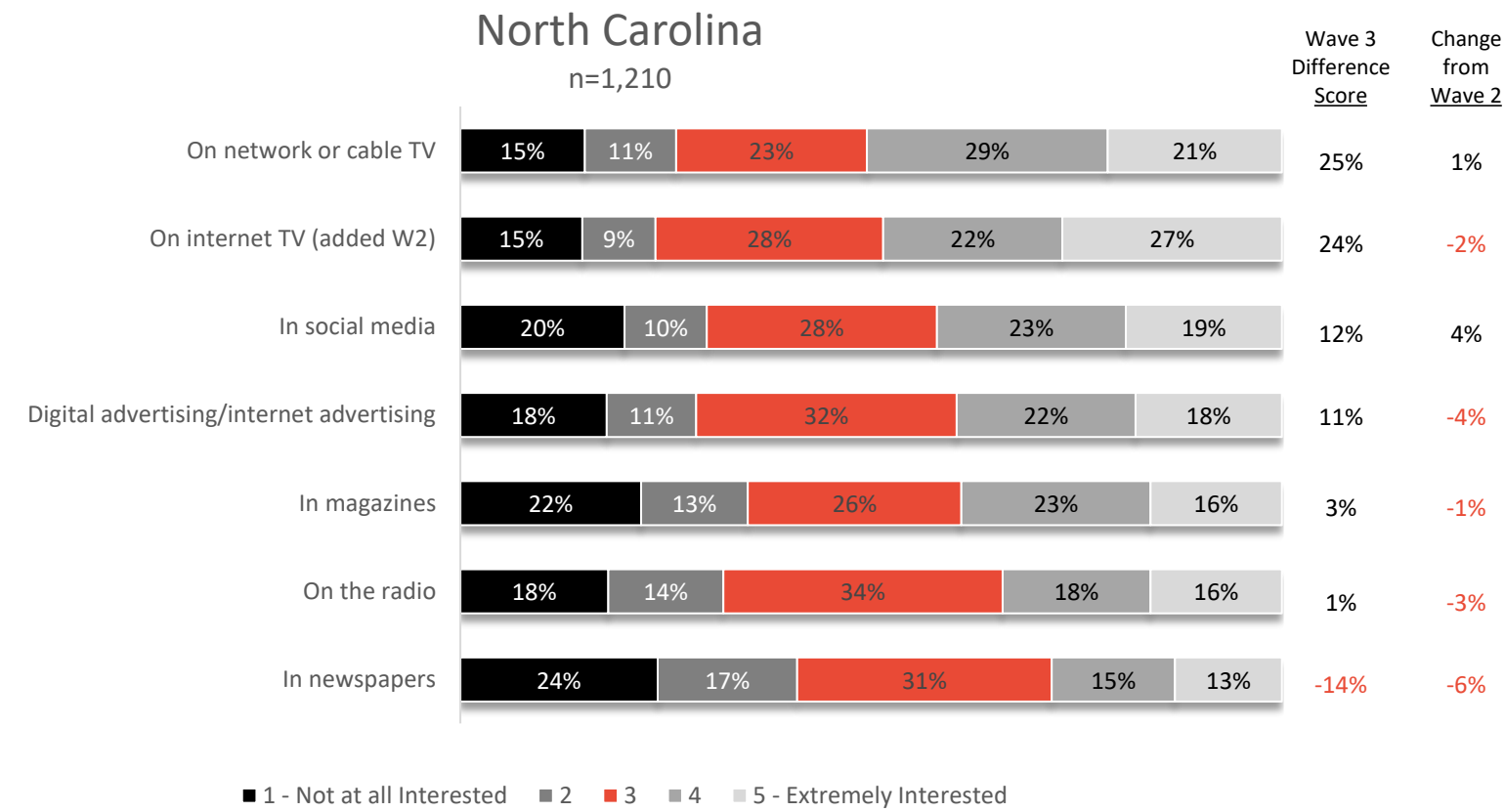
Q15: Using a scale of 1 (not at all interested) to 5 (extremely interested), how interested are you to see promotional advertising for North Carolina as a destination or other destinations within North Carolina?

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



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=248	35-54 n=326	55+ n=634
On network or cable TV	24	34	17
On internet TV	39	37	2
Digital advertising/internet advertising	28	13	-6
In magazines	12	2	-4
In social media	36	21	21
On the radio	8	7	-9
In newspapers	-7	-15	-19

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

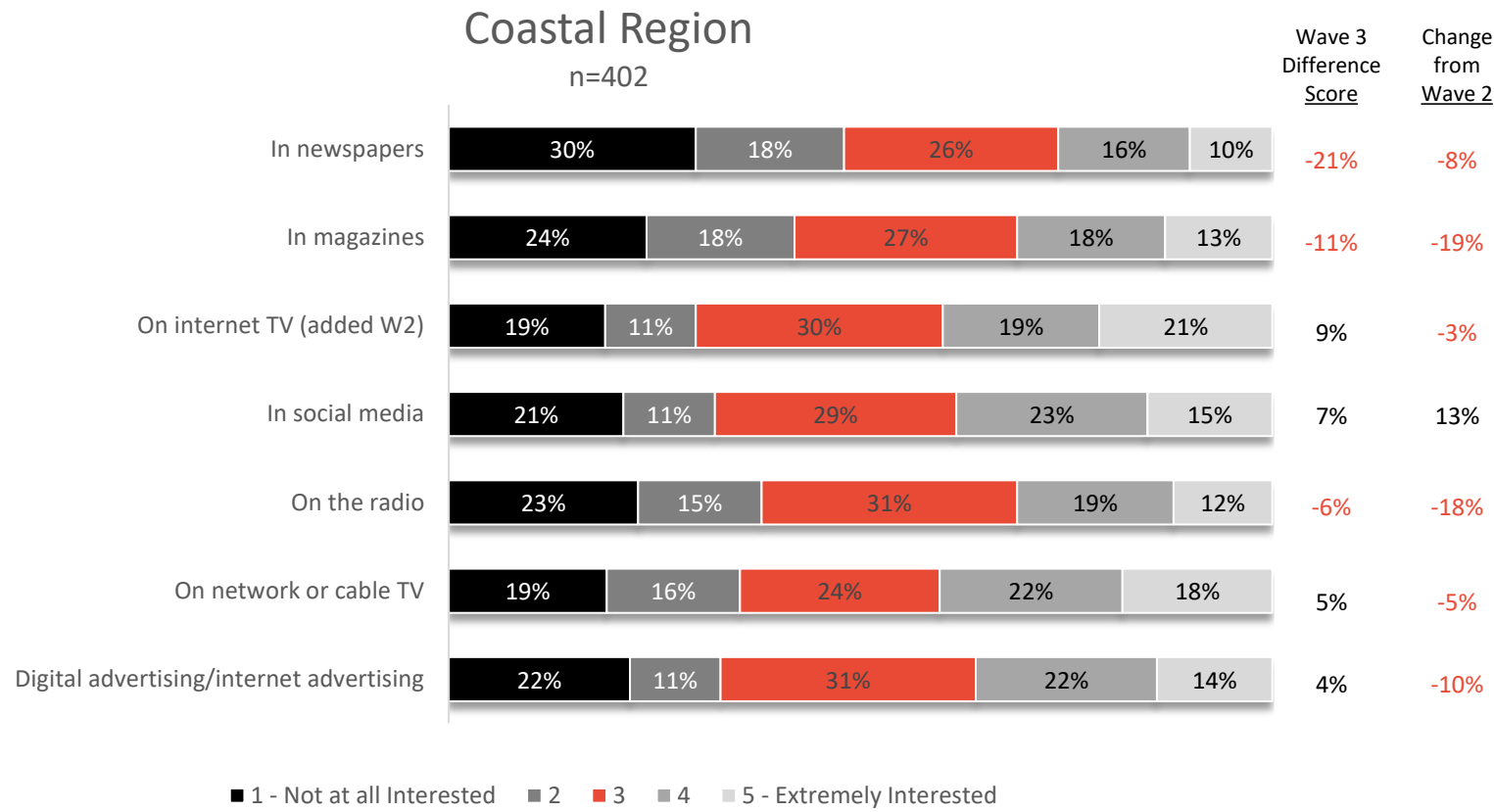
North Carolina

Difference Scores (%)

	<5 Years n=155	5-10 Years n=177	11-20 Years n=216	20+ Years n=279	Born in NC n=383
On network or cable TV	2	8	23	28	34
On internet TV	13	22	15	26	30
Digital advertising/internet advertising	3	22	17	14	4
In magazines	-19	10	11	15	-5
In social media	10	11	2	5	22
On the radio	-24	-1	7	11	--
In newspapers	-42	-20	-2	3	-22

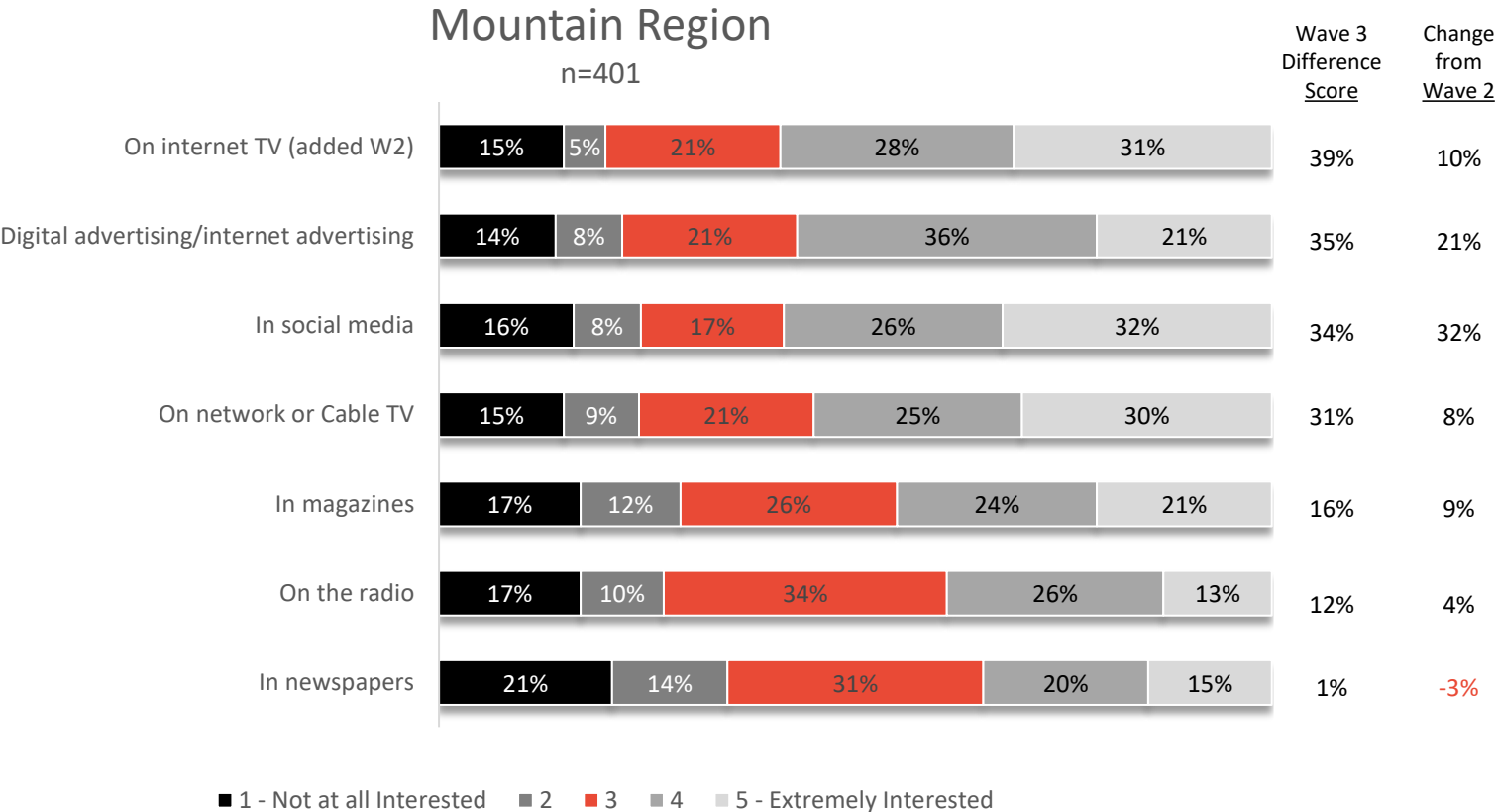
Q16: Using a scale of 1 (not at all interested) to 5 (extremely interested), please indicate your level of interest in the type of media you would be interested in seeing promotional advertising for North Carolina as a destination or other destinations within North Carolina.

Interest in Media Type for Promotional Advertising



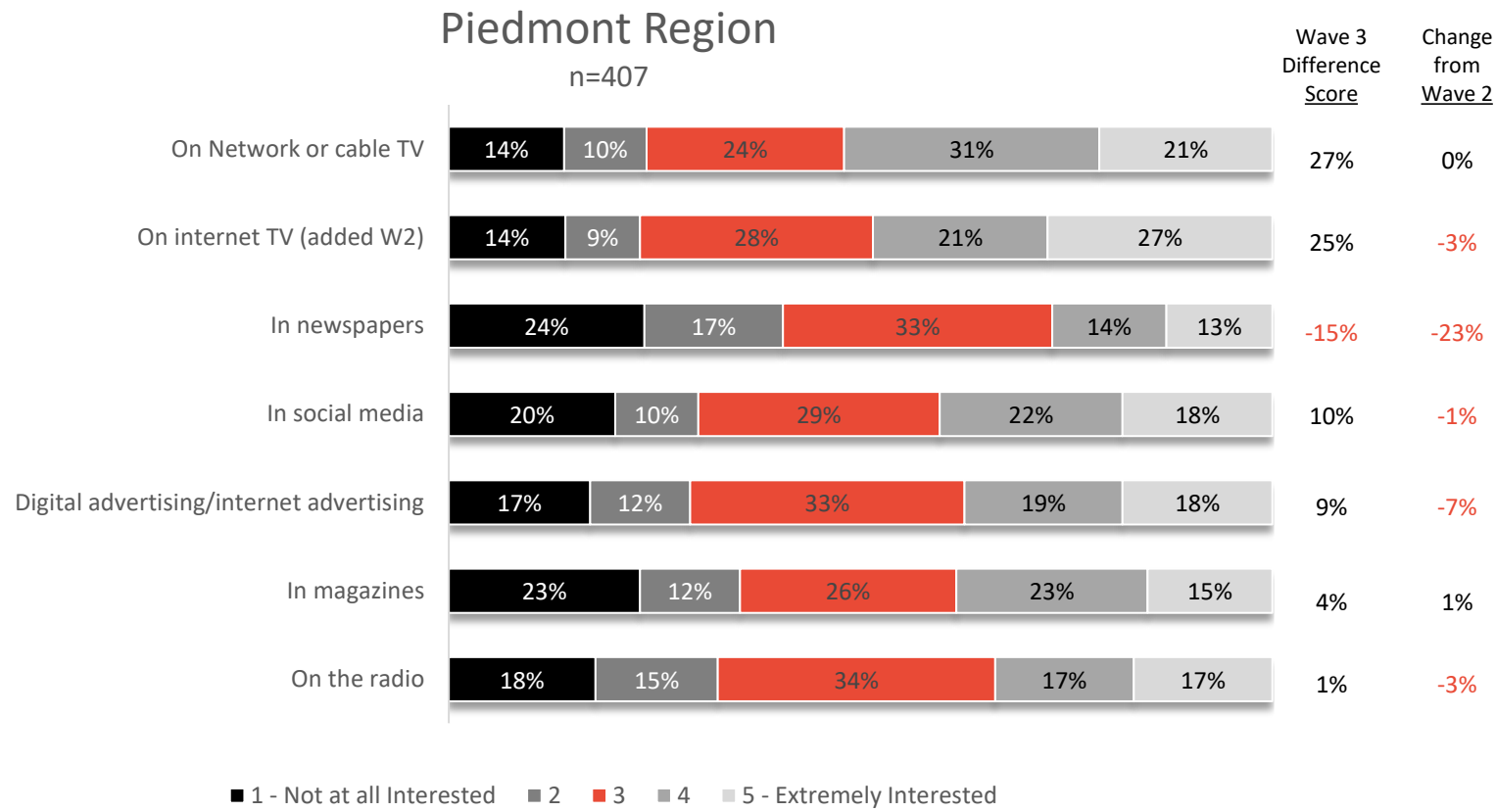
Q16: Using a scale of 1 (not at all interested) to 5 (extremely interested), please indicate your level of interest in the type of media you would be interested in seeing promotional advertising for North Carolina as a destination or other destinations within North Carolina.

Interest in Media Type for Promotional Advertising



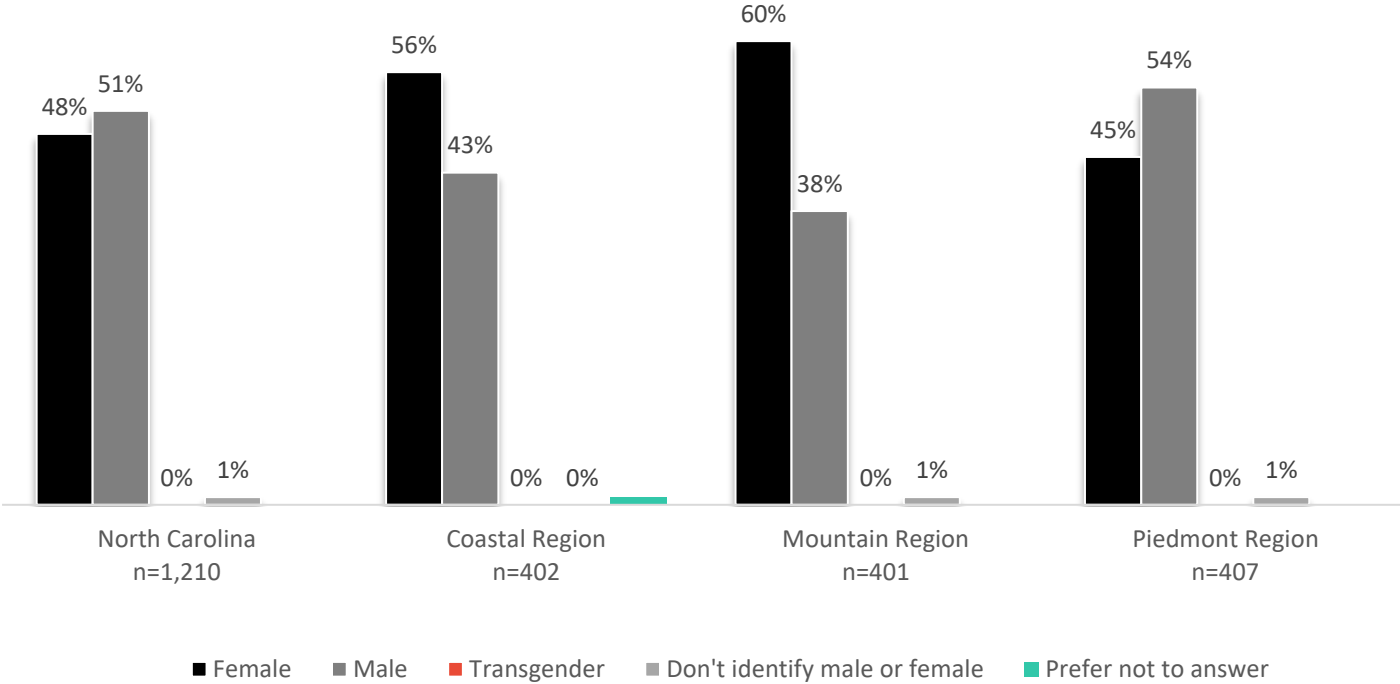
Q16: Using a scale of 1 (not at all interested) to 5 (extremely interested), please indicate your level of interest in the type of media you would be interested in seeing promotional advertising for North Carolina as a destination or other destinations within North Carolina.

Interest in Media Type for Promotional Advertising



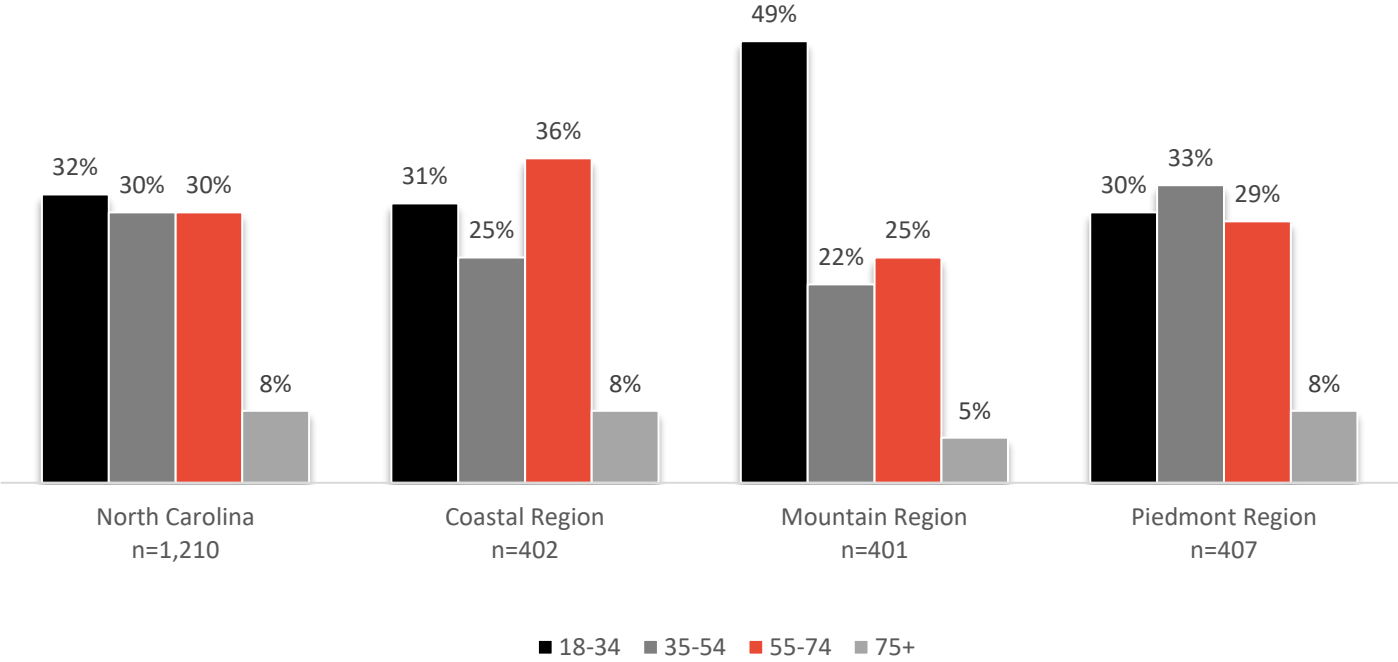
Demographics

Gender



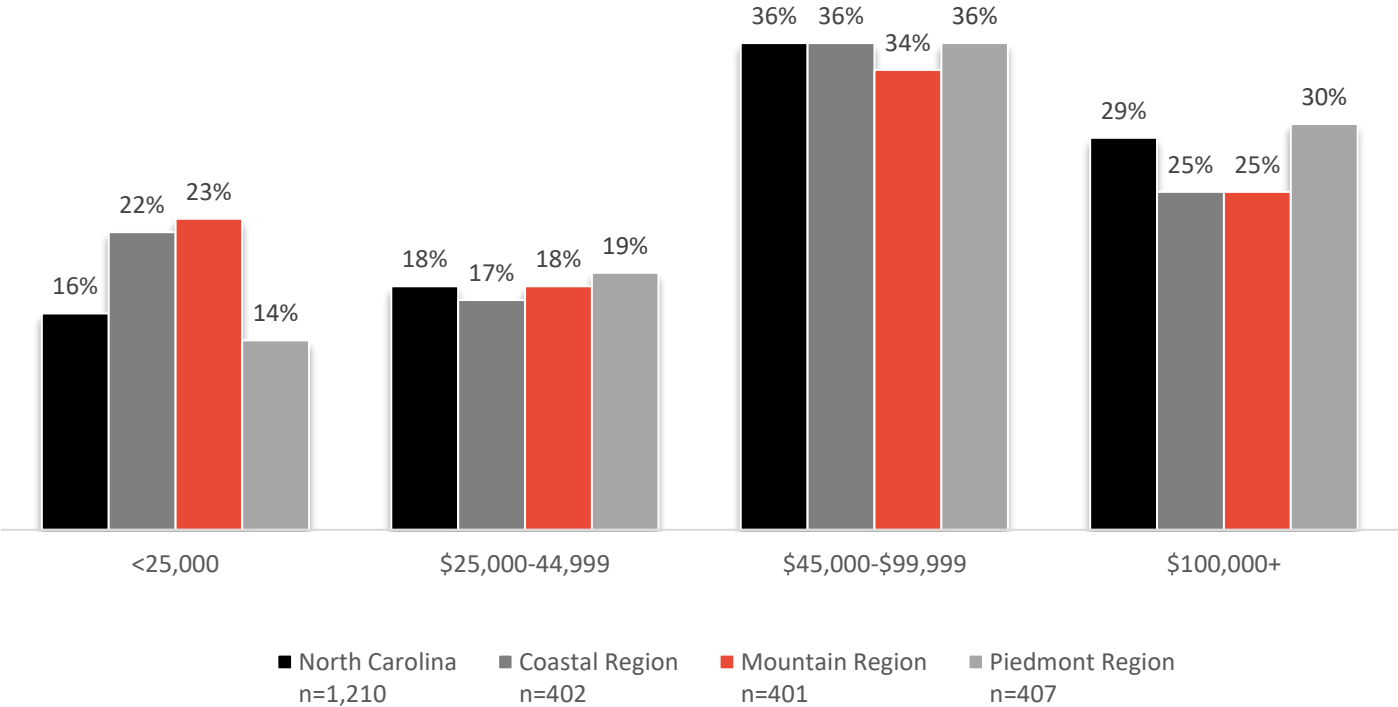
Q: How do you identify yourself?

Age



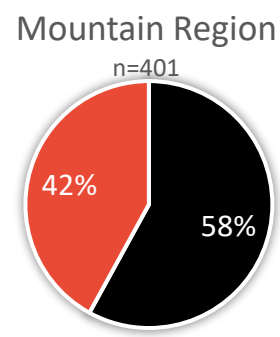
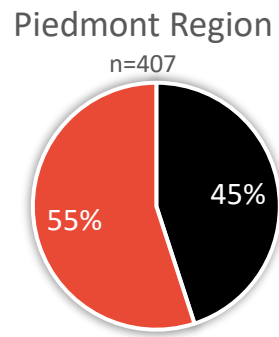
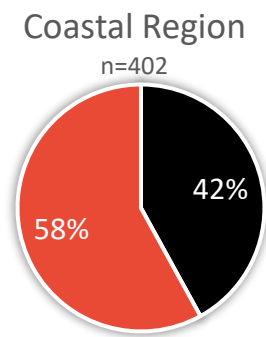
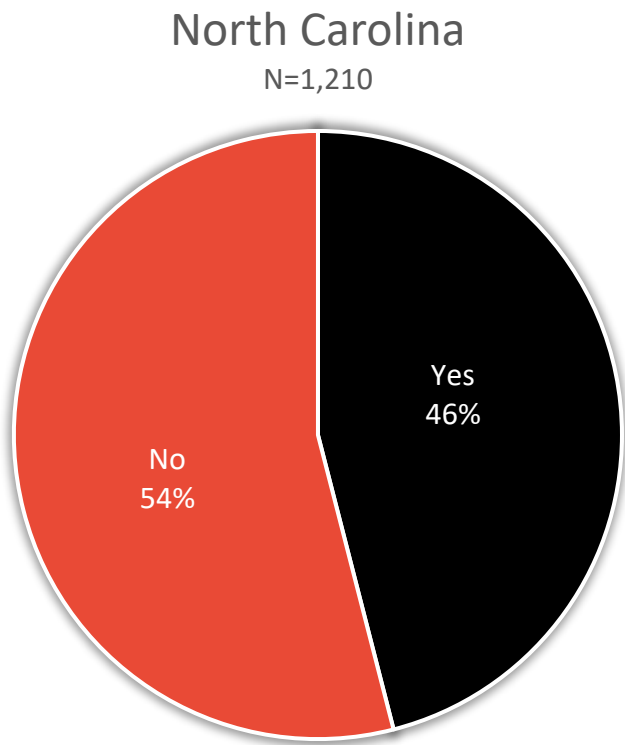
Q: Which of the following categories includes your age?

Household Income



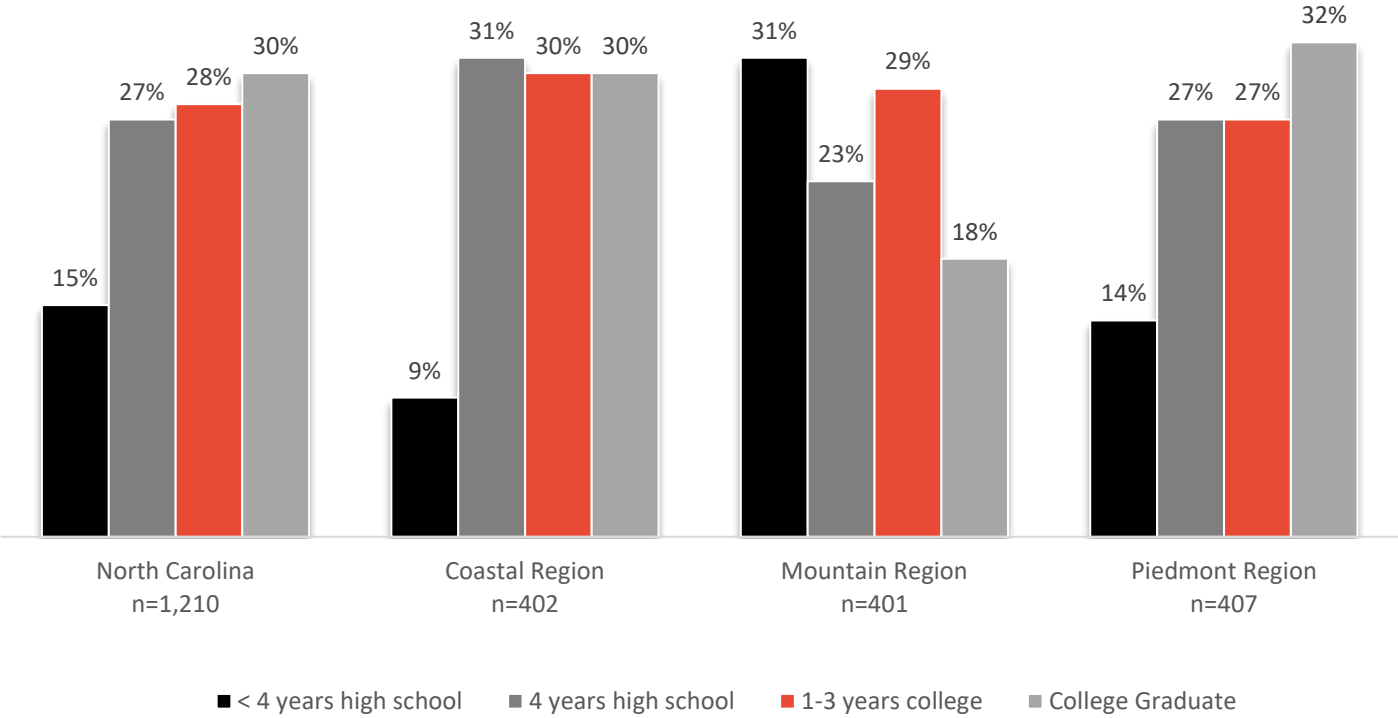
Q: What is your annual household income?

Children in Household



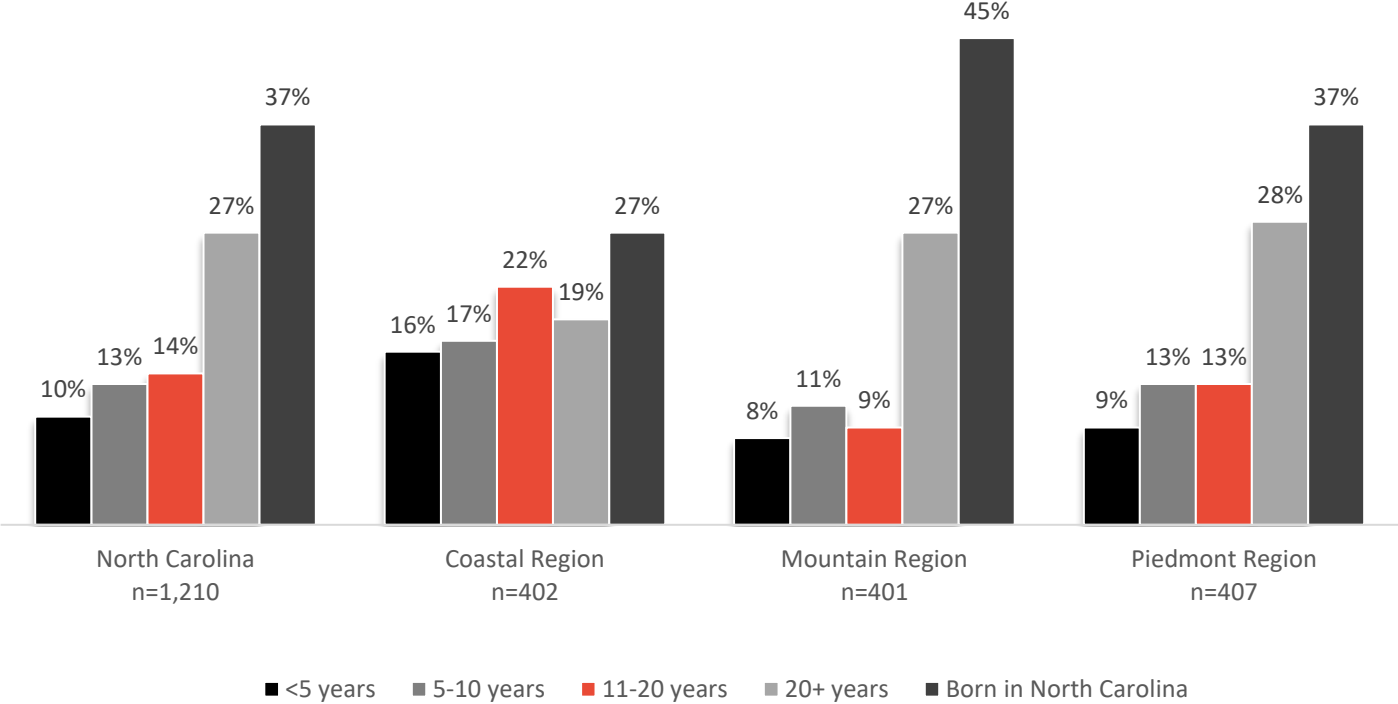
Q: Do you currently have children 18 years of age or younger living in your household?

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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Cheryl Schutz

VP, Travel Intelligence

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