



2020 NORTH CAROLINA REGIONAL VISITOR PROFILE

A Publication of Visit North Carolina

A Unit of the Economic Development Partnership of North Carolina

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- Visit North Carolina contracts with research company OmniTrak Group, Inc. for data on North Carolina visitors through its TravelTrakAmerica product.
- Each month, TravelTrakAmerica research program conducts over 10,000 Internet-based interviews among past 12-month travelers who have traveled more than 50 miles from their homes (excluding commuters).
- From this sample, data from 4,500 – 5,500 past month travelers are also collected for even greater insights.
- Information collected includes purpose of trip, mode of travel, travel party characteristics, places visited, number of nights, accommodations, activities, spending, and demographics. Data collected are weighted to match US Census variables, market size, age of household head, household income, and household size.
- The research staff of Visit North Carolina created this report based on this data from TravelTrakAmerica.
- The purpose of this report is to profile the average North Carolina visitor to the three geographic regions of the state.
- At the end of the report, an appendix offers definitions of key travel terms.

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2020 COASTAL VISITOR SUMMARY

- In 2020, approximately 37 million person-trips were taken in North Carolina and the state ranked #5 in the U.S. in terms of domestic visitation. Approximately 8.8 million visitors traveled to the Coastal Region with 85% of them being overnight visitors.
- Ninety-three percent of all Coastal Region visitors came traveled for leisure purposes, while six percent came to conduct business.
- The majority of travelers to the coast in 2020 visited during the summer and/or fall.
- The party size for the average coastal visitor party was 3.3 in 2020. 37 percent of travel parties included children under the age of 18.
- The average Coastal Region visitor party trip expenditure was \$902 in 2020. Overnight visitor parties spent \$1,118 while daytrip parties spent \$108 on average.
- The top states of origin for overnight visitors to the Coastal Region in 2020 were NC, VA, MD, PA, OH, NY, NJ, KY, GA and FL.

2020 MOUNTAIN VISITOR SUMMARY

- In 2020, approximately 37 million person-trips were taken in North Carolina and the state ranked #5 in the U.S. in terms of domestic visitation. Approximately 11.3 million visitors traveled to the Mountain Region with 82% of them being overnight visitors.
- Ninety-one percent of all mountain visitors came traveled for leisure purposes, while six percent came to conduct business.
- The majority of travelers to the mountains in 2020 visited during the summer and/or fall.
- The party size for the average mountain visitor party was 2.9 in 2020. 32 percent of travel parties included children under the age of 18.
- The average Mountain Region visitor party trip expenditure was \$642 in 2020. Overnight visitor parties spent \$805 while daytrip parties spent \$131 on average.
- The top states of origin for overnight visitors to the mountains in 2020 were NC, GA, SC, FL, VA, TN, KY, AL and PA.

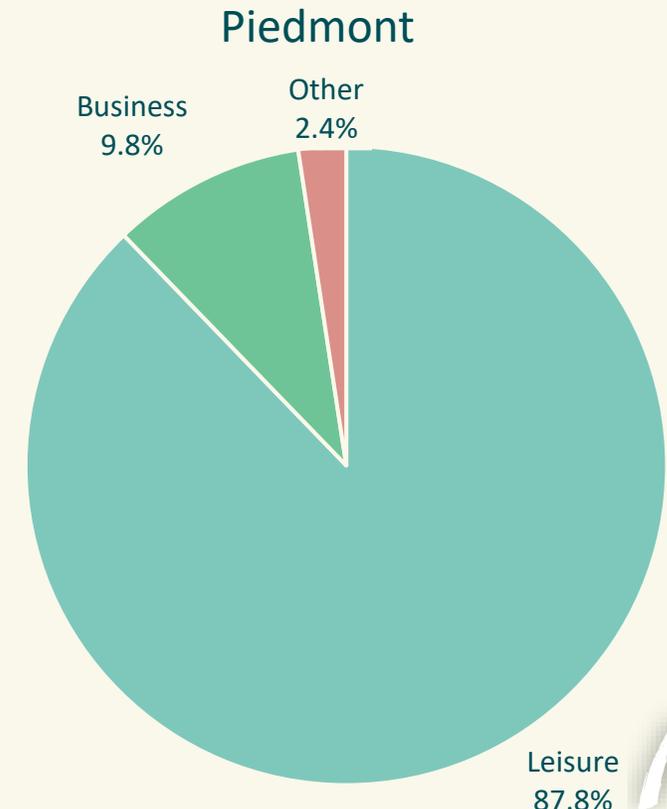
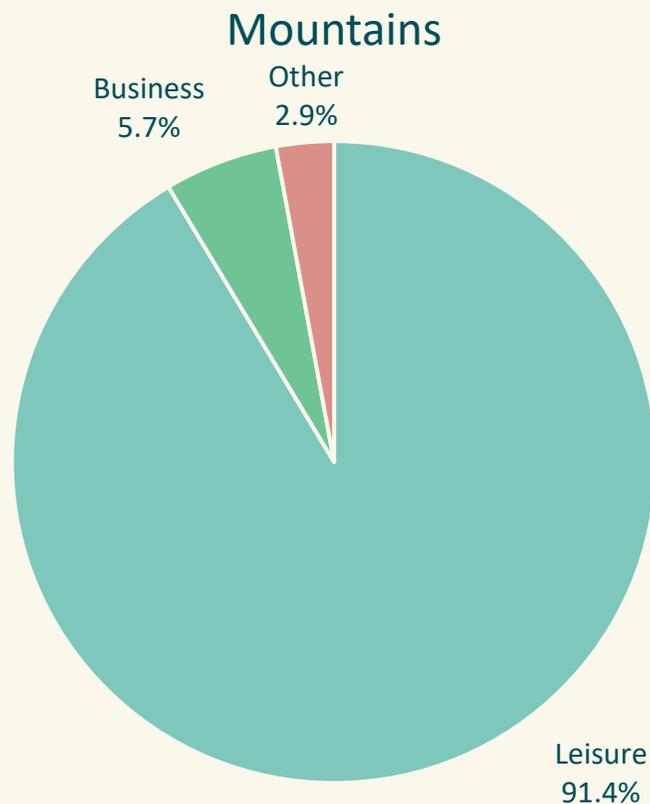
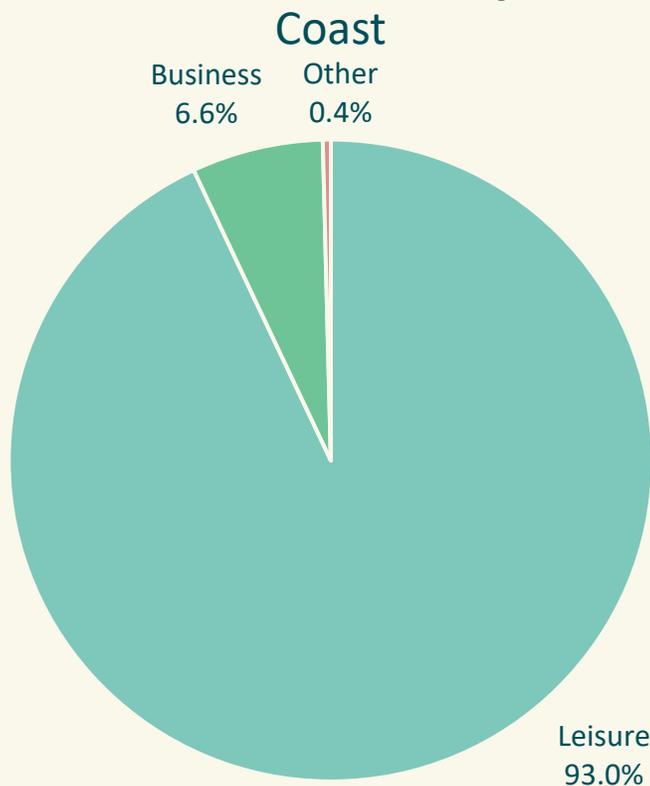


2020 PIEDMONT VISITOR SUMMARY

- In 2020, approximately 37 million person-trips were taken in North Carolina and the state ranked #5 in the U.S. in terms of domestic visitation. Approximately 21.2 million visitors traveled to the Piedmont Region with 75% of them being overnight visitors.
- Eighty-eight percent of all piedmont visitors came traveled for leisure purposes, while ten percent came to conduct business.
- The majority of travelers to the piedmont in 2020 visited during the fall and/or winter.
- The party size for the average piedmont visitor party was 2.6 in 2020. 32 percent of travel parties included children under the age of 18.
- The average Piedmont Region visitor party trip expenditure was \$342 in 2020. Overnight visitor parties spent \$448 while daytrip parties spent \$133 on average.
- The top states of origin for overnight visitors to the piedmont in 2020 were NC, SC, NY, VA, FL, TN, GA, MD, OH and CA.

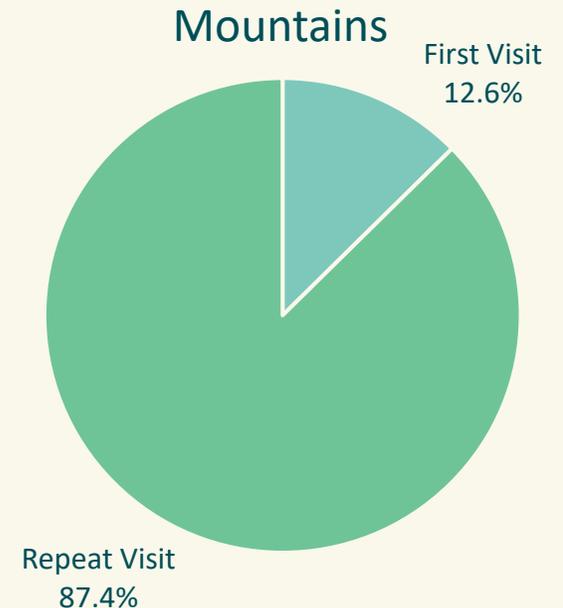
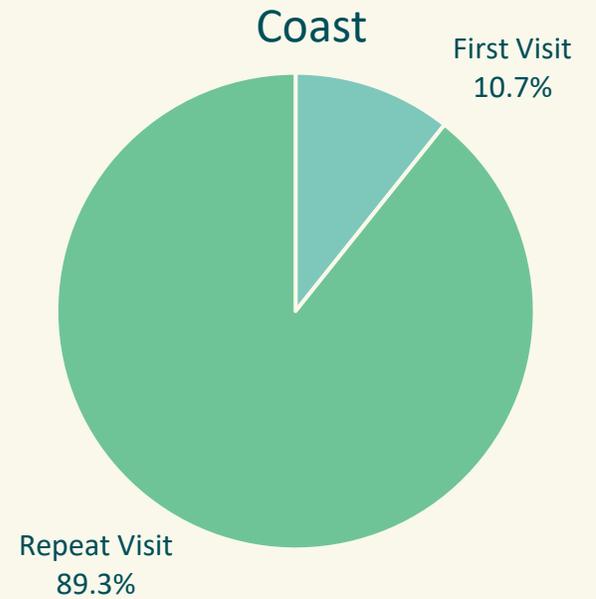
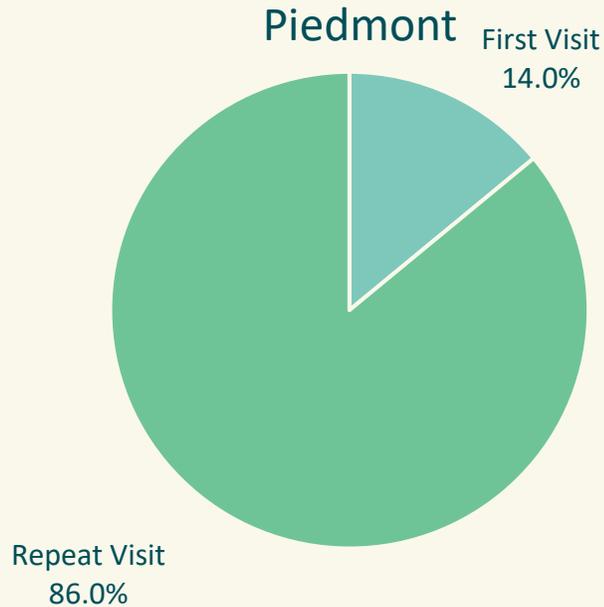
Main Purpose of Visit to Overnight Visitors to North Carolina Regions

- Leisure is by far the top primary purpose of visit for each region of the state.
- 63% of business travelers to the Mountain Region say that they extended their business trip for leisure in 2020, while 55% of Piedmont visitors and 52% of Coastal visitors extended their stays.



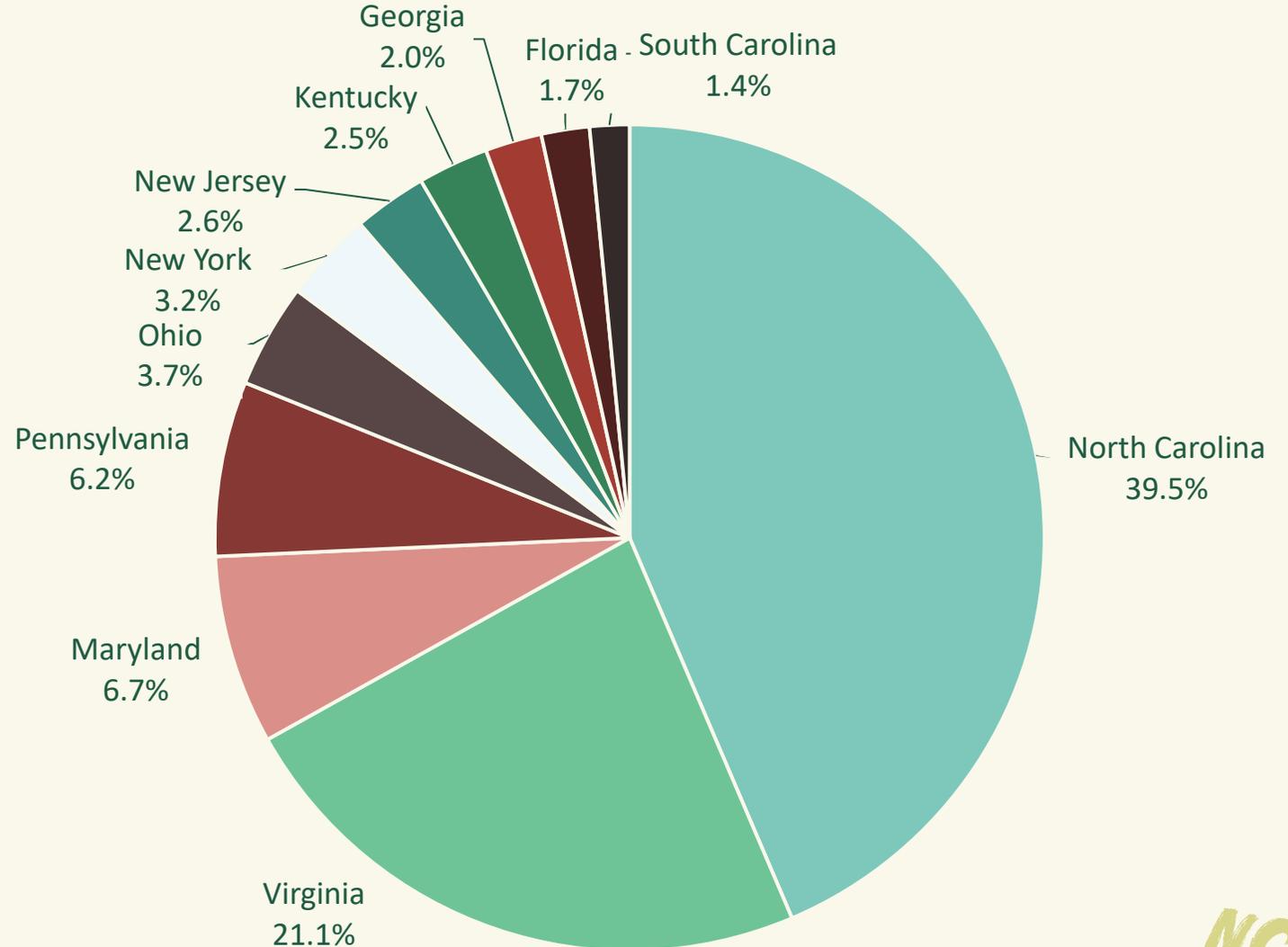
First Overnight Visit to North Carolina

- The Piedmont Region welcomed a slightly higher proportion of first-time visitors to the state in 2020 than the other regions.
- However, the majority of overnight visitors in each region were repeat visitors.



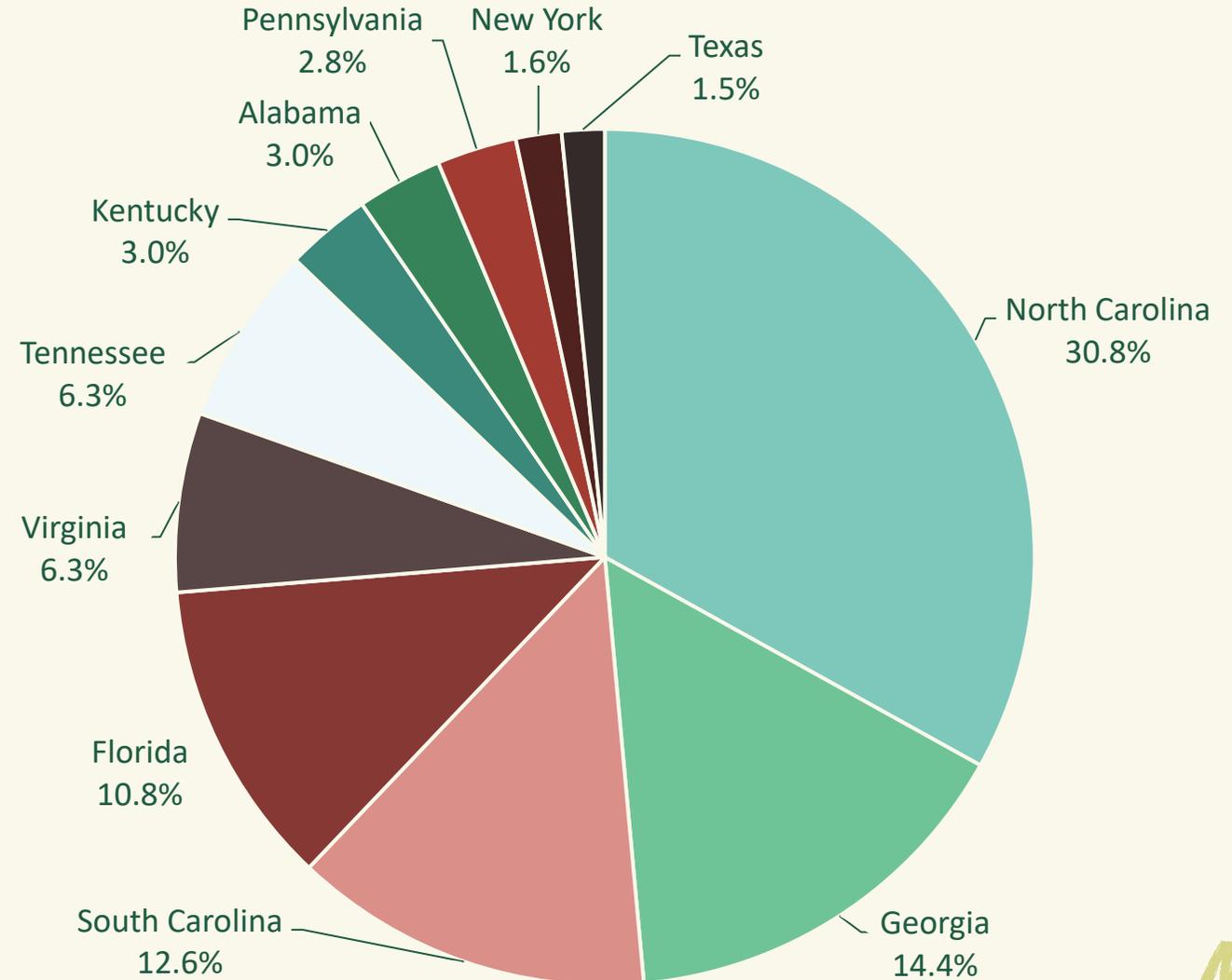
State of Origin of Overnight Visitors to North Carolina — Coastal Region

- Nearly 40 percent of overnight visitors to the coast in 2020 were in-state residents.
- The next ten states represented 51 percent of visitors to the Coastal Region.



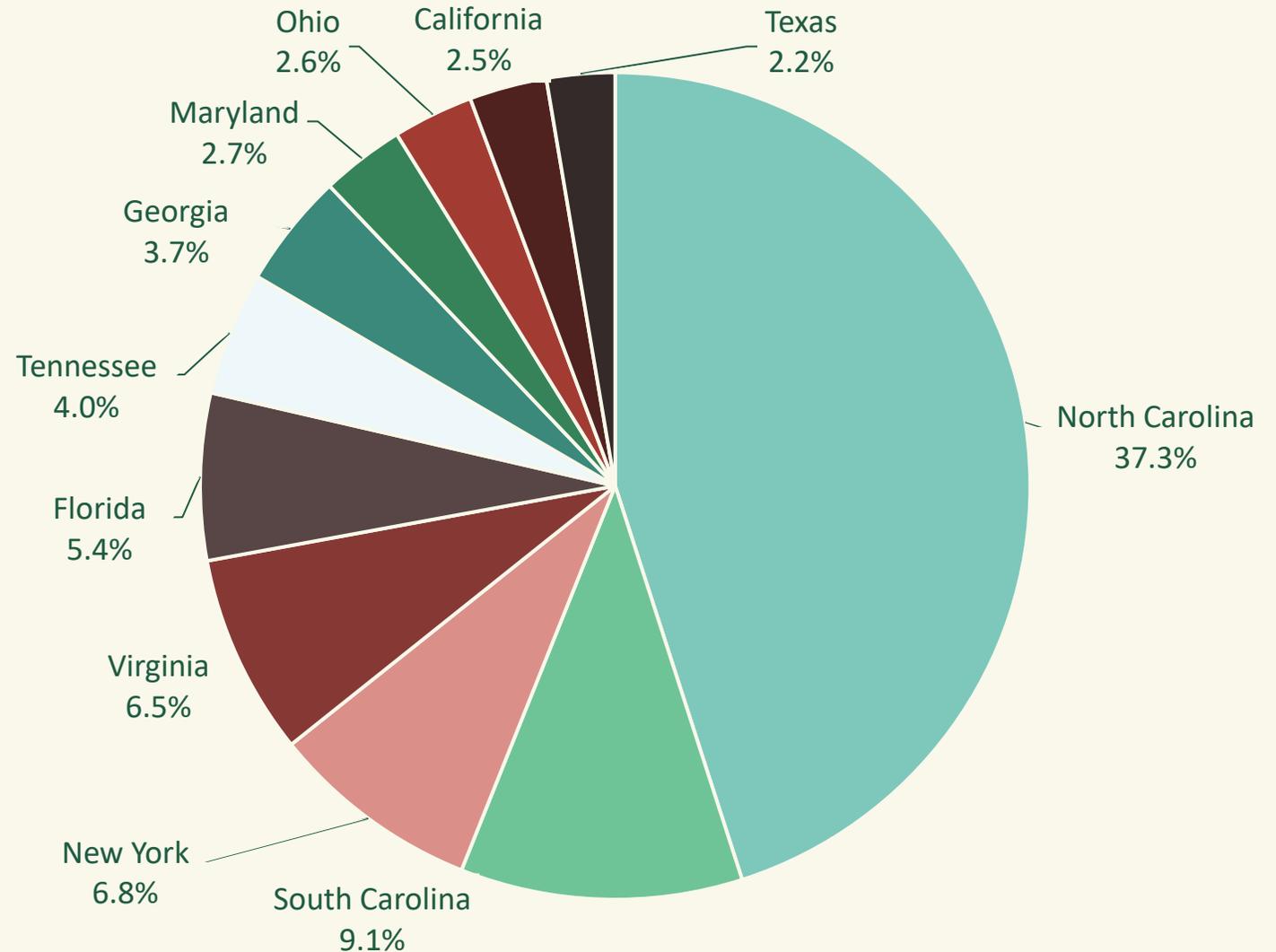
State of Origin of Overnight Visitors to North Carolina — Mountain Region

- Just over 30 percent of overnight visitors to the mountains in 2020 were in-state residents.
- The next ten states represented 62 percent of visitors to the Mountain Region.



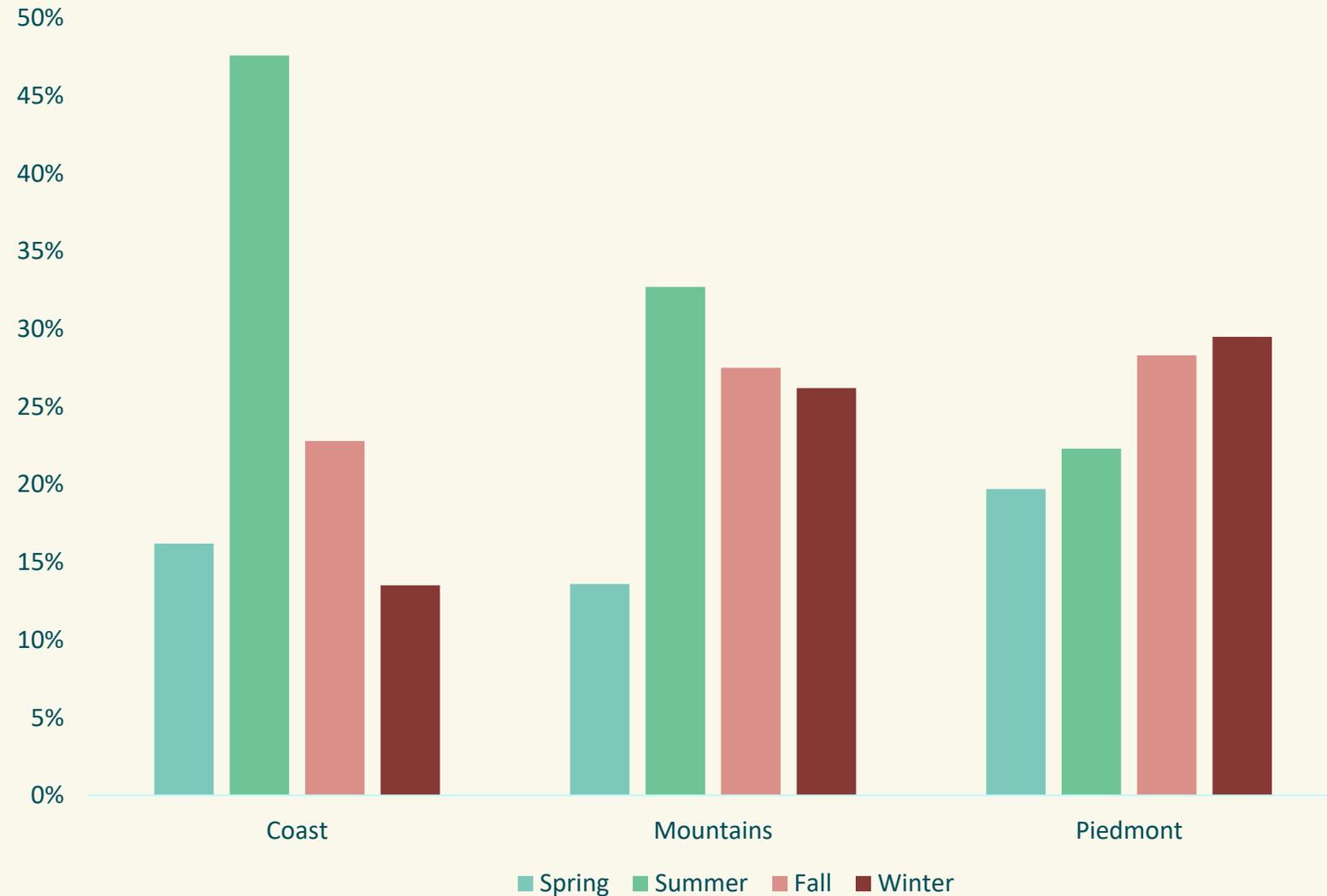
State of Origin of Overnight Visitors to North Carolina — Piedmont Region

- Just over 37 percent of overnight visitors to the piedmont in 2020 were in-state residents.
- The next ten states represented 45.5% percent of visitors to the Piedmont Region.



Season of Visit

- The summer season was the most popular for overnight visitors to the coast and mountains in 2020.
- The Piedmont Region saw a larger proportion of visitors during the fall and winter last year.



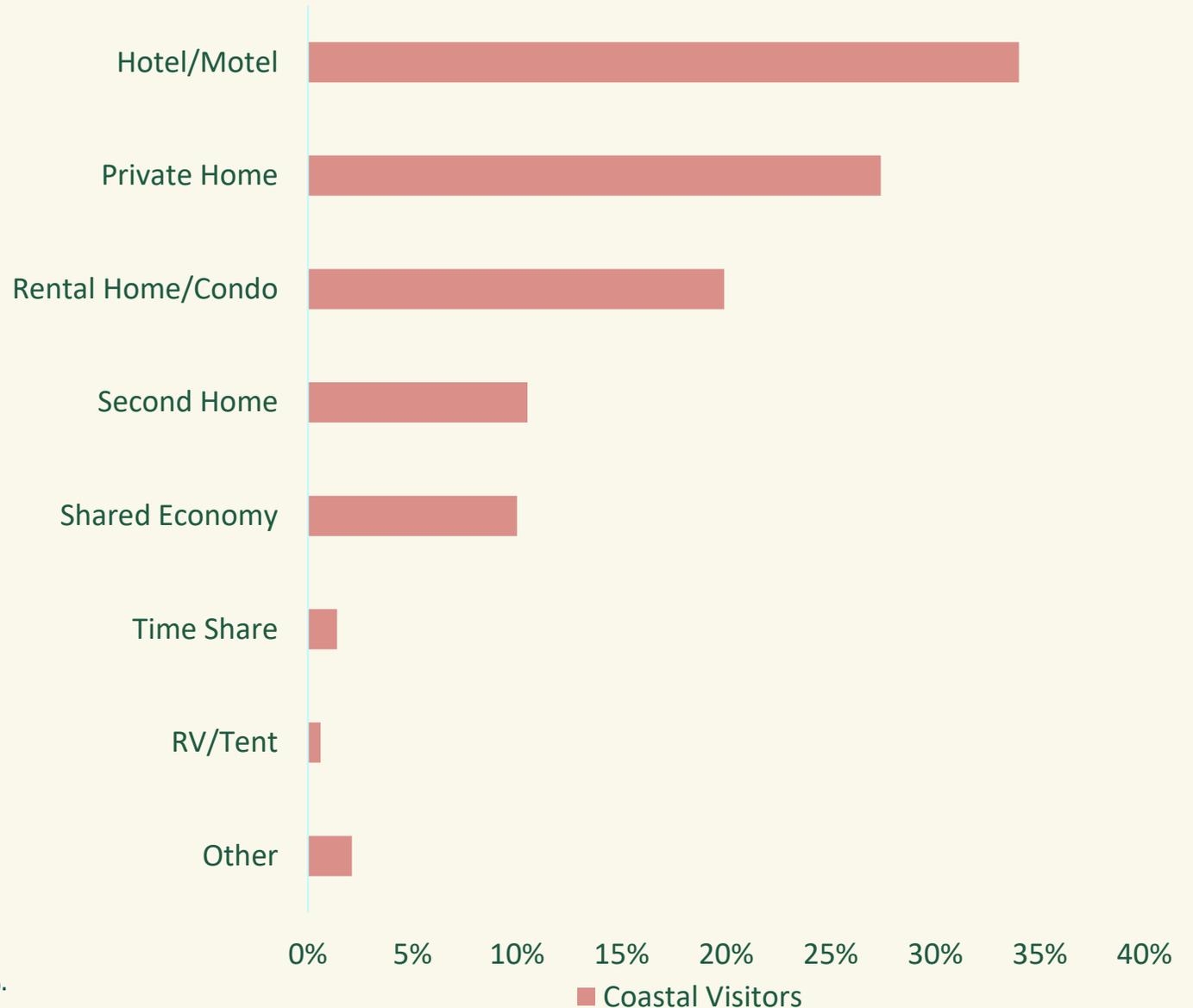
Average Length of Stay for NC Overnight Visitors

- Coastal Region– 3.6 nights
- Mountain Region – 2.6 nights
- Piedmont Region – 2.3 nights



Accommodations Used in Coastal Region

- Coastal Region visitors were more likely to use hotels/motels while in the state, followed closely by private homes and rental homes/condos.
- Ten percent of overnight visitors to the coast reported a stay in a shared economy property.

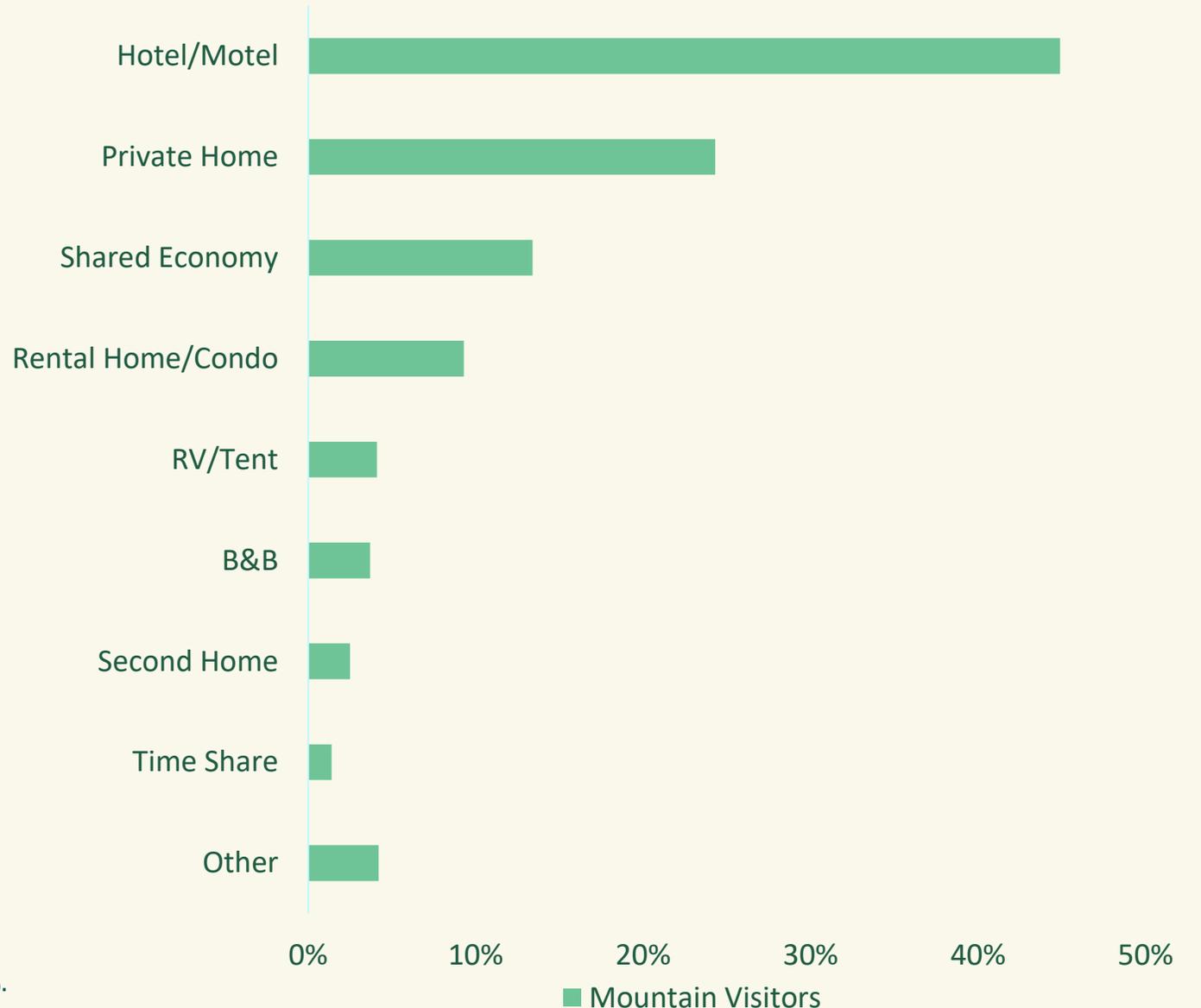


*multiple responses allowed; thus, percentages do not add to 100%.



Accommodations Used in Mountain Region

- Mountain Region visitors were more likely to use hotels/motels while in the state, followed closely by private homes.
- Thirteen percent of overnight visitors to the mountains reported a stay in a shared economy property.

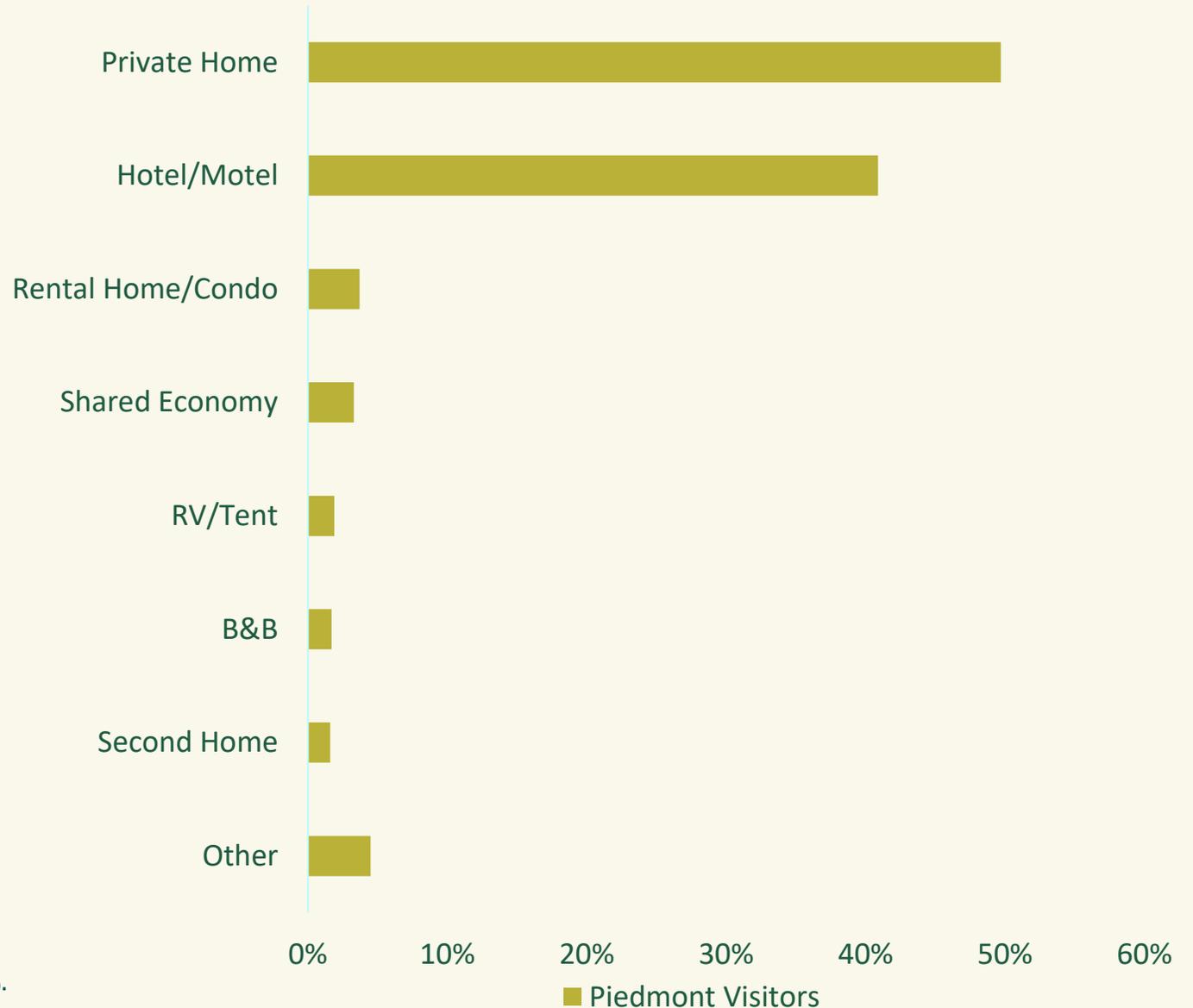


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Accommodations Used in Piedmont Region

- Piedmont Region visitors were more likely to use private homes while in the state, followed closely by hotels/motels.
- Three percent of overnight visitors to the piedmont reported a stay in a shared economy property.

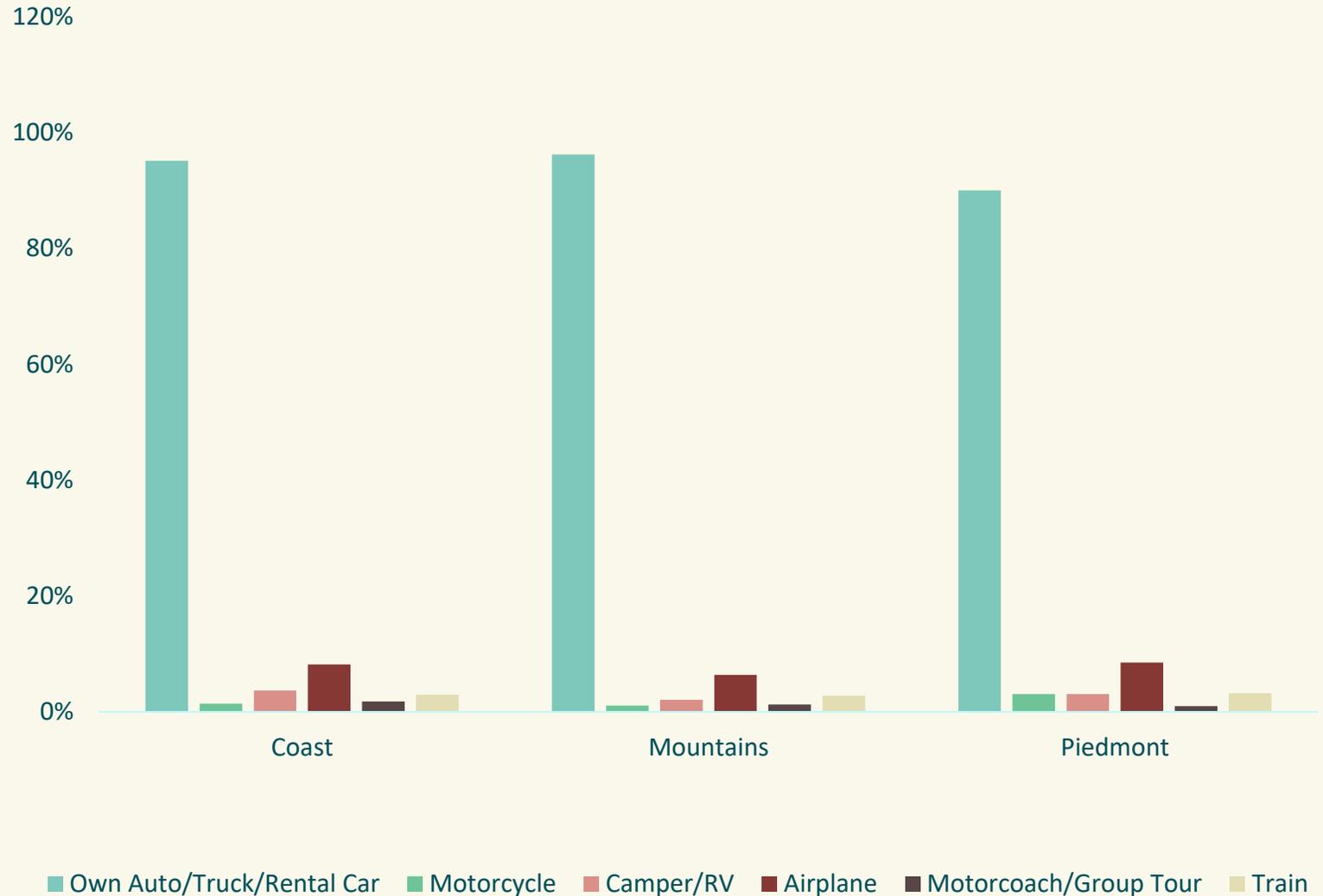


*multiple responses allowed; thus, percentages do not add to 100%.



Transportation Used to Travel to North Carolina

- Not surprisingly, overnight travelers to each region traveled to the state via automobile, either personal or rented.
- Not surprisingly, the proportion of travelers using air to get to NC decreased in 2020.

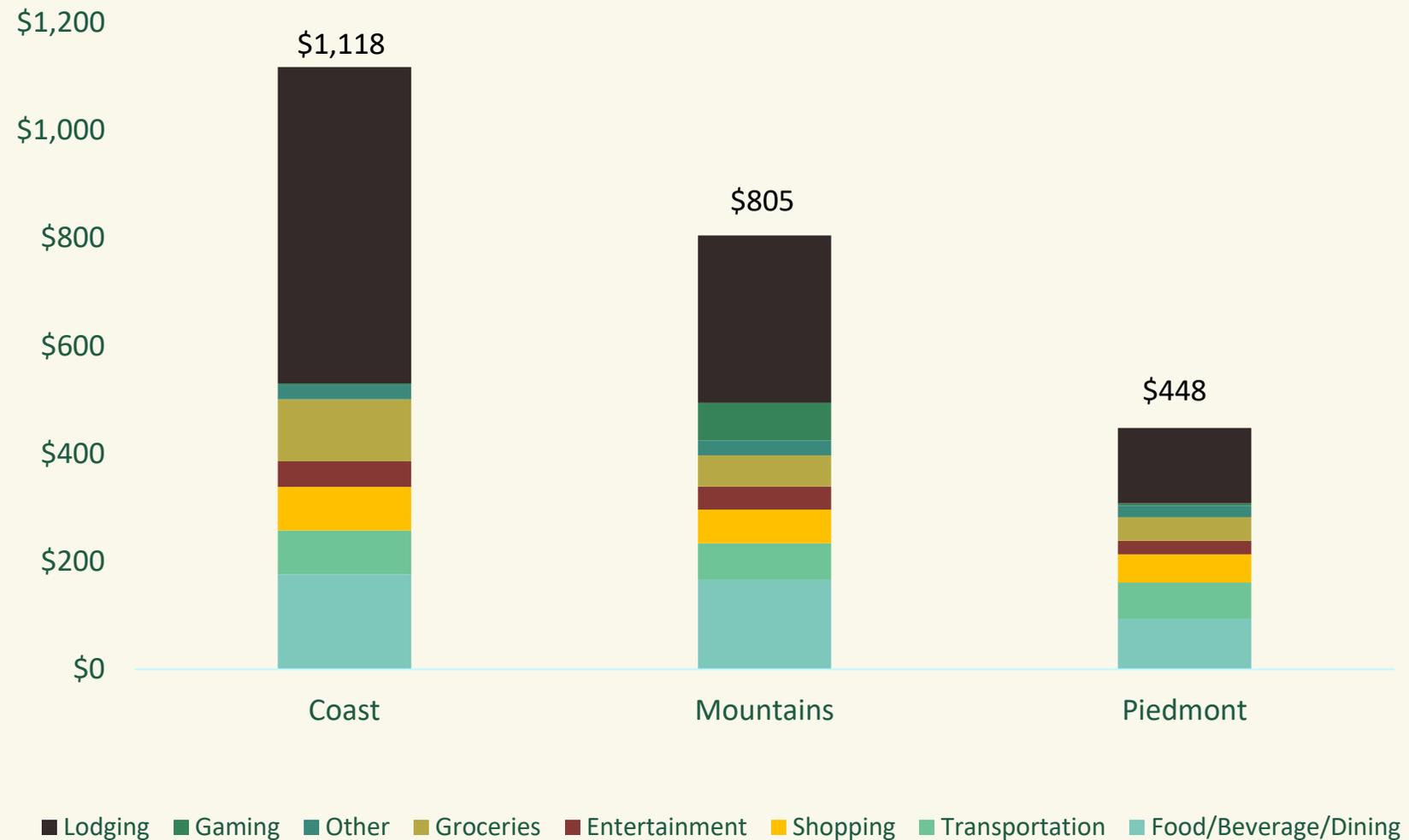


*multiple responses allowed; thus, percentages do not add to 100%.



Average Trip Spending for Overnight NC Visitor Parties by Region

- Overnight visitors to the coast spent more per trip in 2020 than visitors to other regions
- However, the length of stay for coastal visitors is also longer.

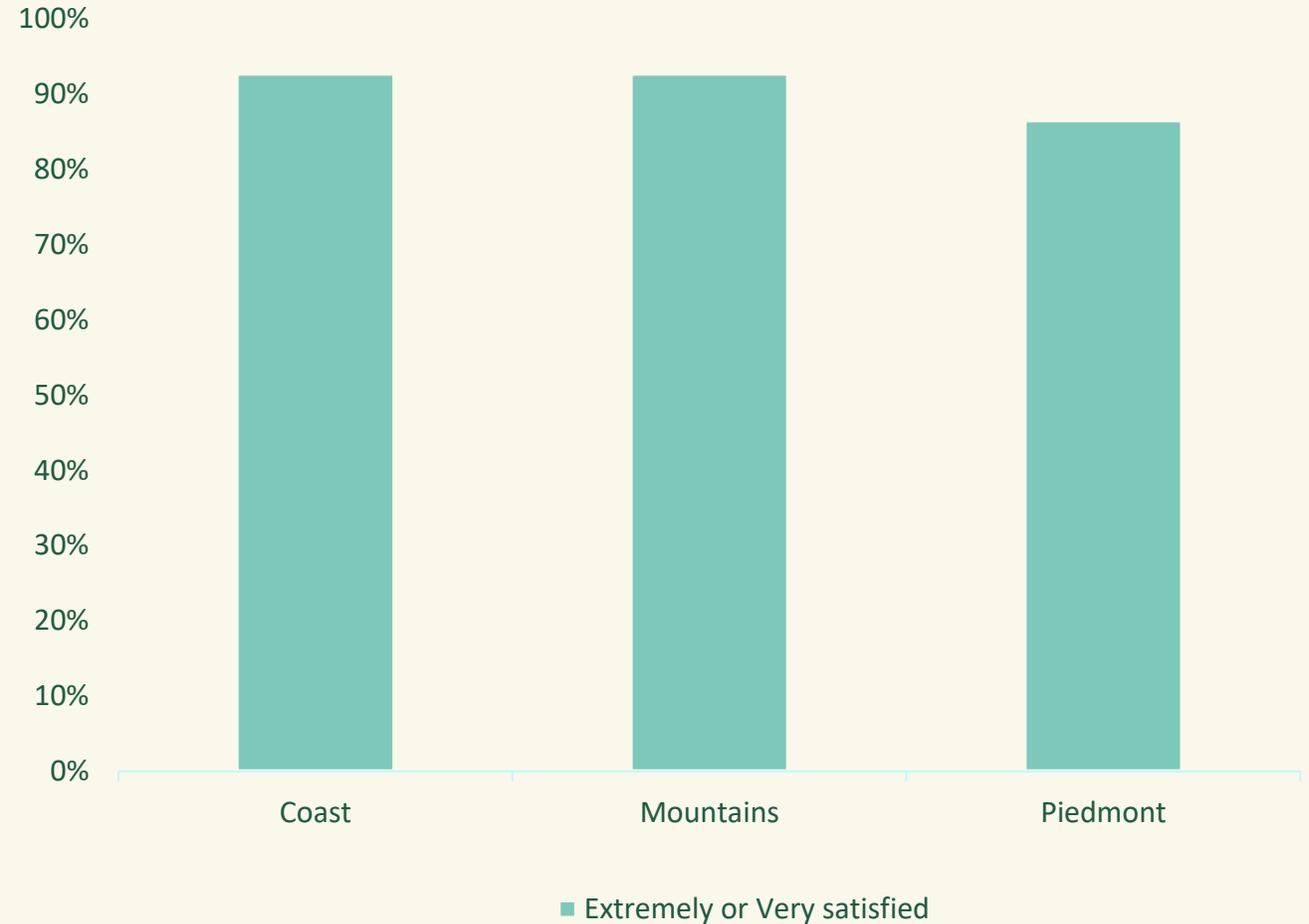


Top Activities Participated in by Overnight Regional Visitors in 2020

Coastal Visitors		Mountain Visitors		Piedmont Visitors	
Beach	75.8%	Hiking/Backpacking/Canyoneering	31.4%	Visiting friends/relatives	53.9%
Shopping	33.1%	Visiting friends/relatives	29.0%	Shopping	24.0%
Visiting friends/relatives	27.2%	Rural sightseeing	24.4%	Historic sites	14.4%
Fishing	20.8%	Shopping	22.4%	Museums	12.0%
Historic sites	19.7%	Historic sites	22.3%	National park/Monuments/Recreation areas	11.5%
Fine dining	15.1%	Wildlife viewing	19.7%	Rural sightseeing	11.2%
Rural sightseeing	13.0%	National park/Monuments/Recreation areas	17.3%	Urban sightseeing	10.7%
Wildlife viewing	12.0%	State park/Monuments/Recreation areas	17.0%	Fine dining	10.0%
National park/Monuments/Recreation areas	11.2%	Nature travel/Ecotouring	16.4%	State park/Monuments/Recreation areas	9.8%
Golf	8.5%	Fishing	13.9%	Wildlife viewing	9.1%
Hiking/Backpacking/Canyoneering	7.3%	Craft breweries	13.9%	Fishing	8.9%
Biking/Road biking/Cycling	6.9%	Other nature (photography, rockhound, etc)	13.2%	Gardens	6.9%
Gardens	6.4%	Fine dining	12.7%	Hiking/Backpacking/Canyoneering	6.6%
State park/Monuments/Recreation areas	6.2%	Gardens	12.7%	Art Galleries	6.6%
Museums	6.0%	Urban sightseeing	11.8%	Zoos/Aquariums/Aviaries	6.0%
Nature travel/Ecotouring	5.8%	Local/folk arts/crafts	11.0%	Other nature (photography, rockhound, etc)	5.7%
Other nature (photography, rockhound, etc)	5.0%	Art Galleries	9.6%	Nature travel/Ecotouring	5.2%
Whitewater rafting/Kayaking/ Canoeing/Paddleboarding	4.9%	Casino/Gaming	9.6%	Theater/Drama	5.0%
Theme park/Amusement park/Water park	4.9%	Museums	9.2%	Theme park/Amusement park/Water park	4.9%
Local/folk arts/crafts	4.8%	Rock/Mountain climbing	7.8%	Craft breweries	4.5%

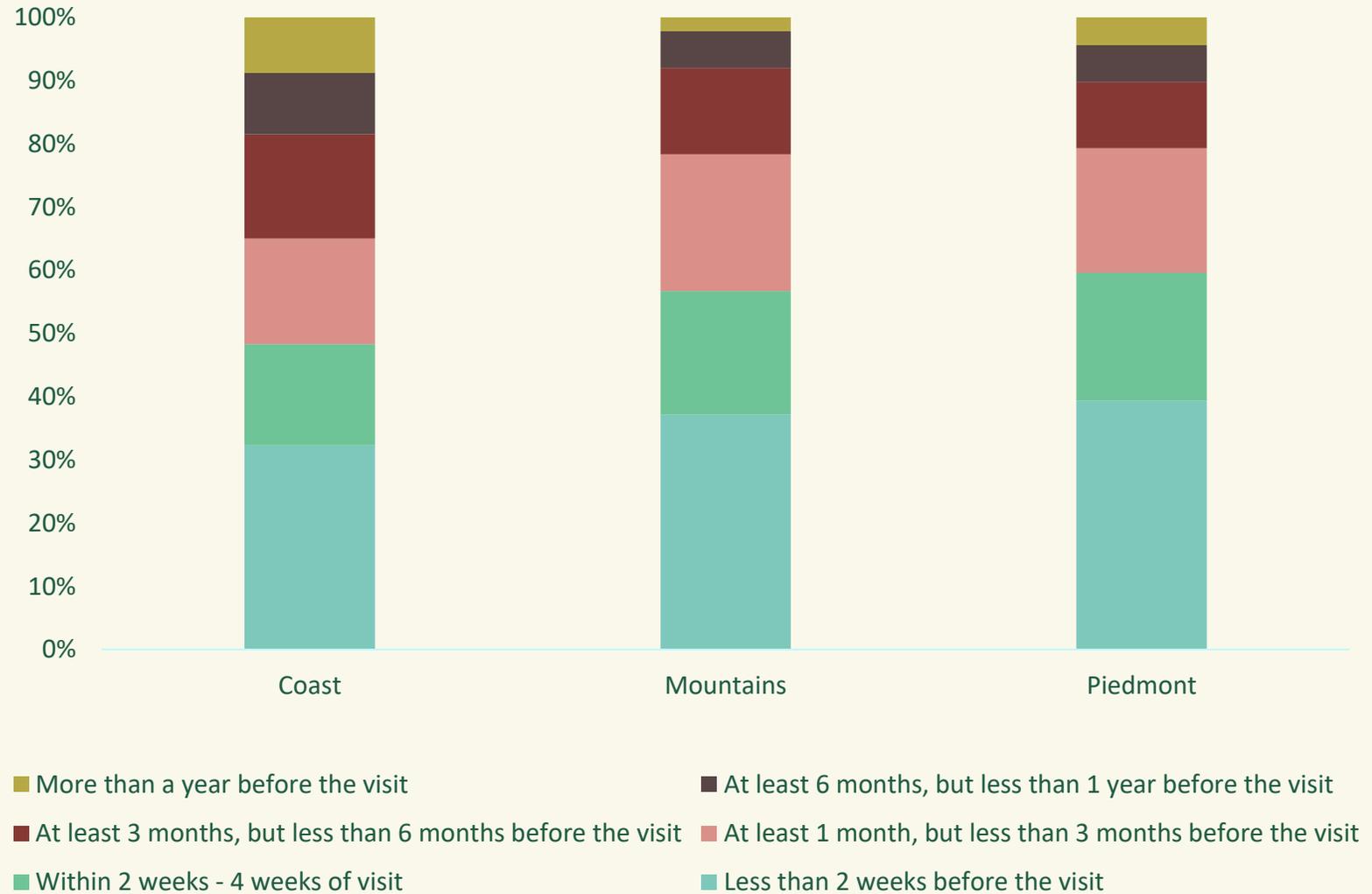
Satisfaction with Visit to North Carolina Regions

- All visitors to and within NC regions reported high satisfactions rates with their visits in 2020.



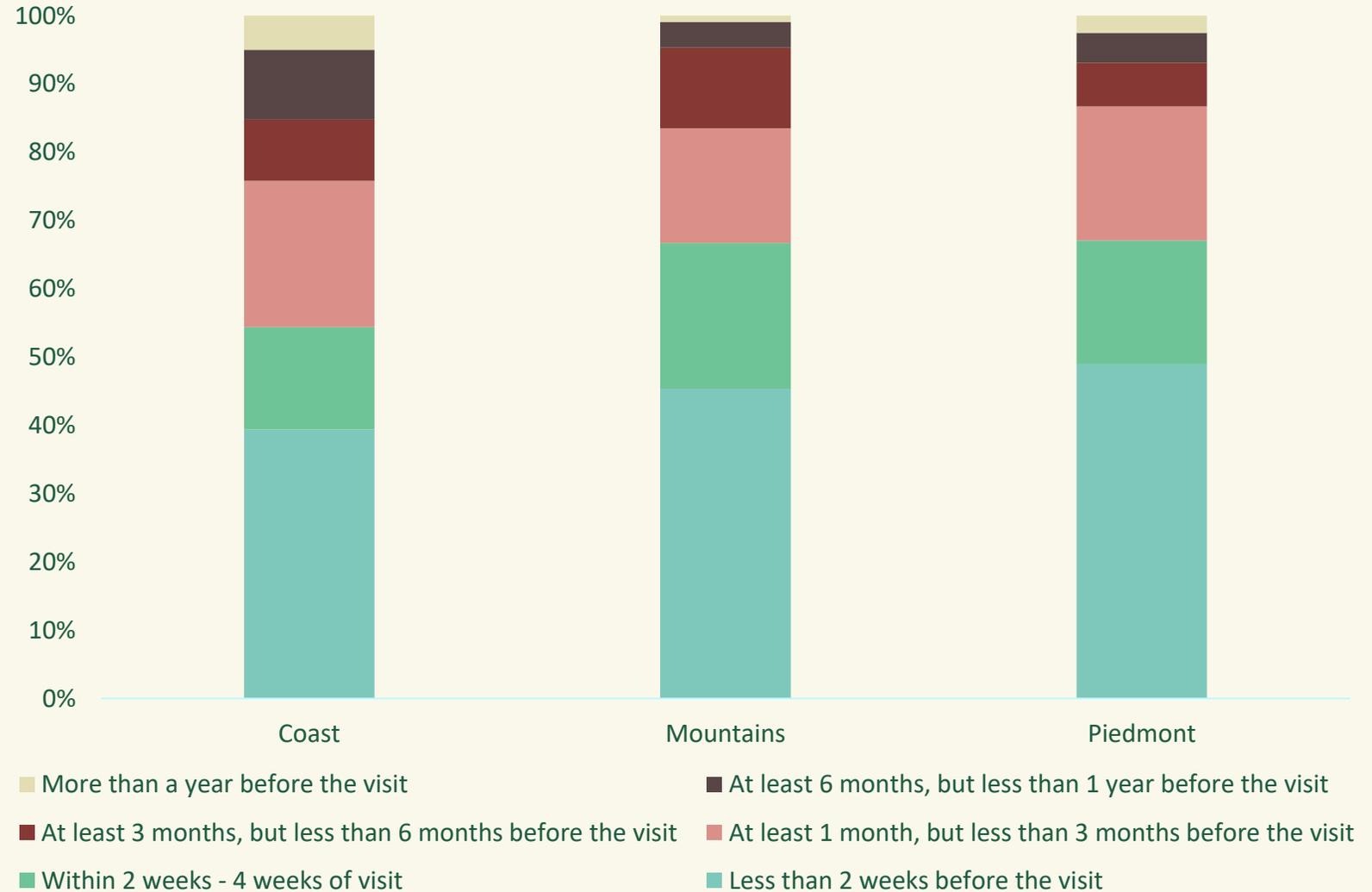
Advance Consideration for Overnight Visit to North Carolina by Region

- In 2020, visitors to the Coastal Region were more likely to have NC in their consideration set for more than three months than visitors to other regions.
- 9 percent of coastal visitors were considering NC more than a year prior to visiting, whereas only 2% of mountain visitors and 4% of piedmont visitors considered visiting that far in advance.



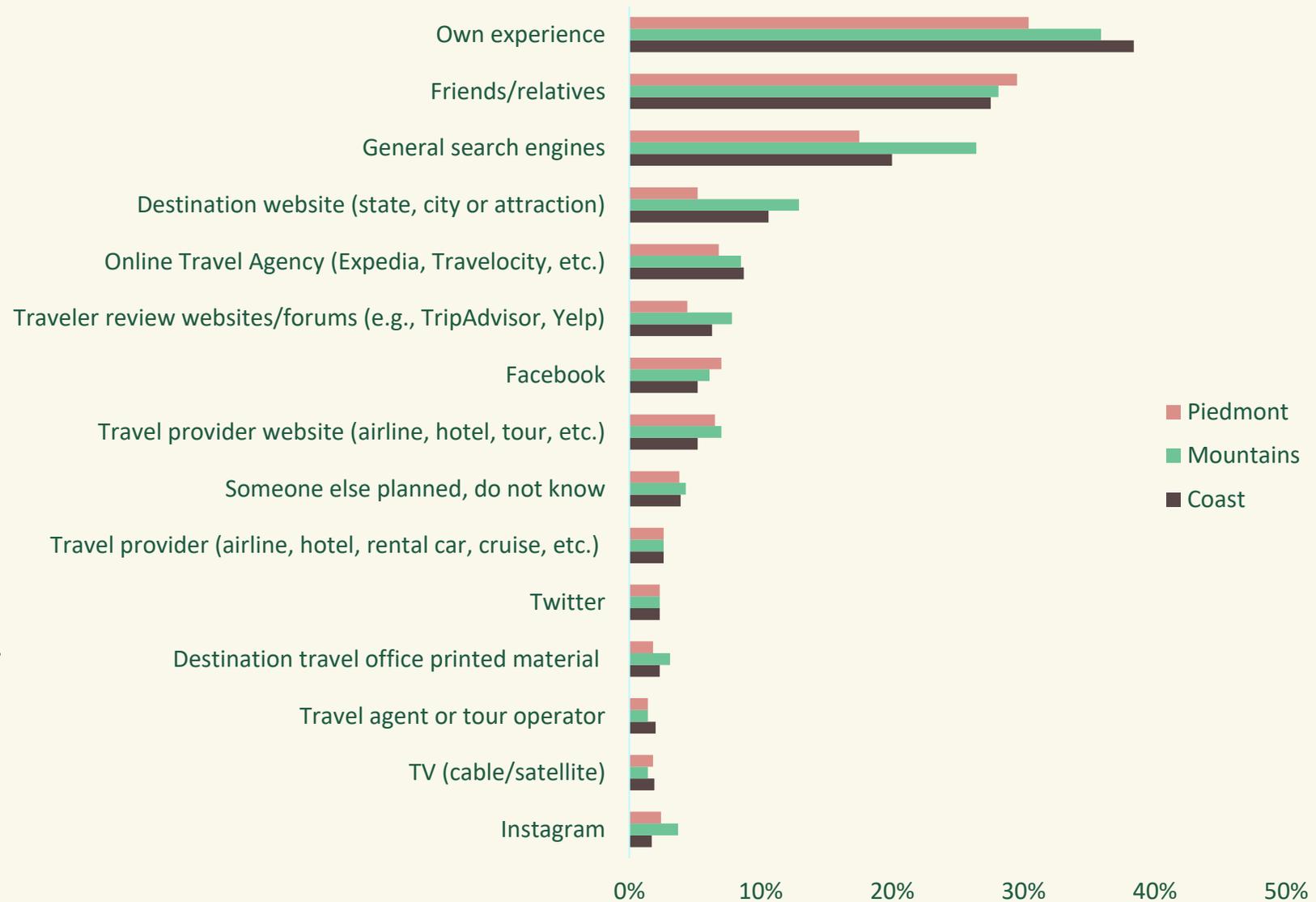
Advance Decision for Overnight Visit to North Carolina by Region

- Coastal Region visitors also made the decision to visit farther in advance than other regional visitors.
- Nearly one-quarter of coastal visitors decided to visit NC three months or more before the visit.



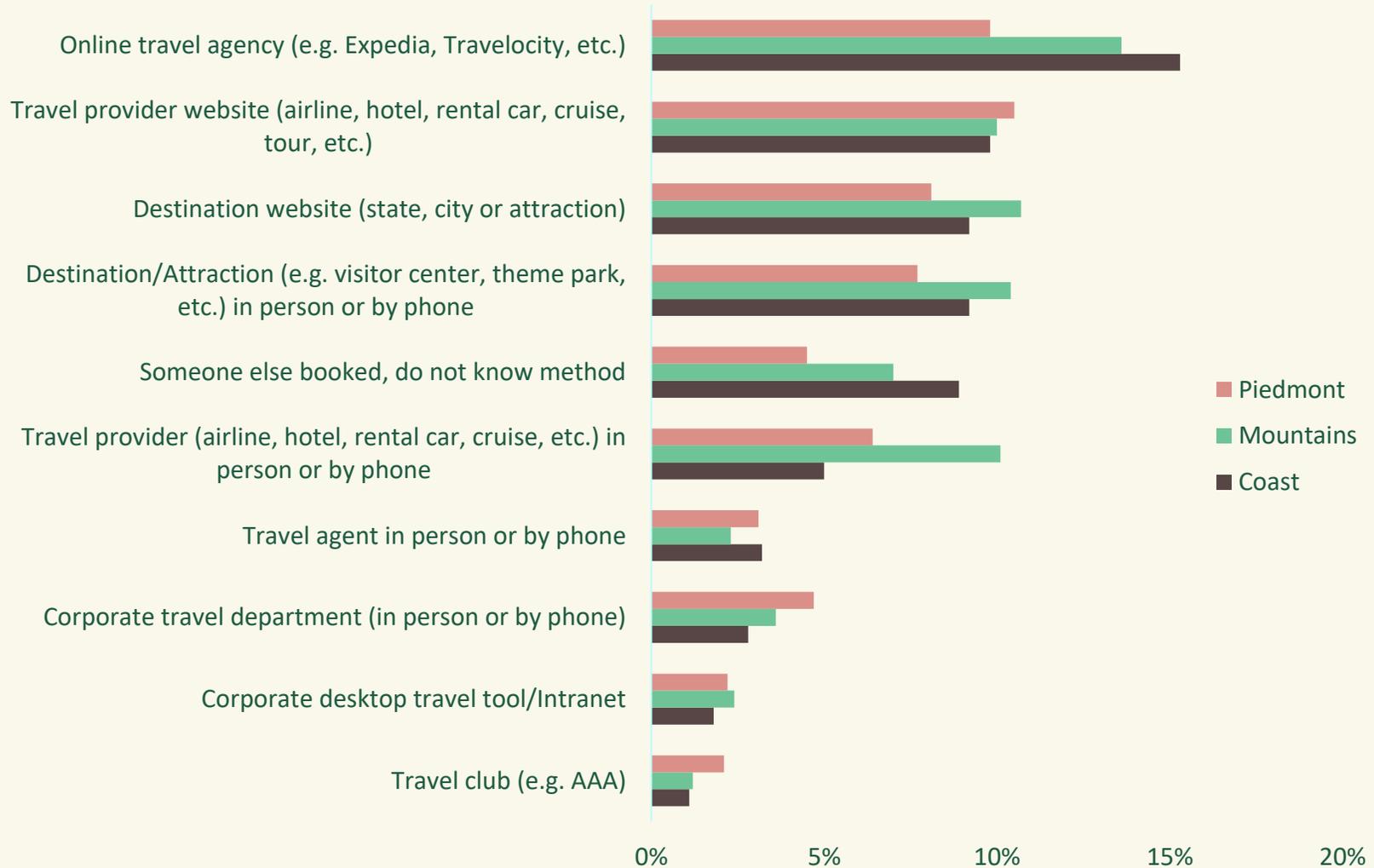
Planning Sources for Overnight Travel to North Carolina Regions

- Visitors to the Mountain Region are more likely to use search engines to plan travel to NC than visitors to other regions.
- Coastal Region visitors are more likely to rely on past experience, while Piedmont Region visitors rely on friends/relatives for planning sources.



Booking Sources for Overnight Travel to North Carolina Regions

- Visitors to the Coastal Region are more likely to book travel to NC via an online travel agency than other regional visitors.
- Mountain Region visitors are more likely to book directly with the travel provider than other regions.
- Piedmont Region visitors rely on both online travel agencies and travel provider websites to book their NC travel.



Top Advertising Markets

- Not surprisingly, in-state markets and those close by were the top DMAs of origin in 2020 for NC regions.
- VA and mid-Atlantic markets ranked high for the coast, while GA, FL and TN ranked high for the mountains. NY ranked 3rd for the piedmont.

Coast DMA of Origin		Mountains DMA of Origin		Piedmont DMA of Origin	
Raleigh-Durham (Fayetteville)	15.6%	Raleigh-Durham (Fayetteville)	12.0%	Raleigh-Durham (Fayetteville)	12.0%
Greensboro-High Point-Winston-Salem	7.5%	Atlanta	11.6%	Charlotte	6.3%
Norfolk-Portsmouth-Newport News	7.5%	Charlotte	11.1%	New York	5.6%
Washington DC (Hagerstown)	7.4%	Greenville-Spartansburg-Asheville-Anderson	6.4%	Greenville-New Bern-Washington	5.6%
Charlotte	5.8%	Greensboro-High Point-Winston-Salem	5.0%	Greensboro-High Point-Winston-Salem	5.1%
Richmond-Petersburg	5.2%	Tampa-Saint Petersburg (Sarasota)	4.5%	Wilmington	5.1%
Philadelphia	4.3%	Tri-Cities, TN-VA	4.3%	Florence-Myrtle Beach	3.7%
Wilmington	3.9%	Knoxville	4.2%	Washington DC (Hagerstown)	3.4%
New York	3.7%	Wilmington	3.1%	Greenville-Spartansburg-Asheville-Anderson	3.3%
Greenville-New Bern-Washington	3.6%	Orlando-Daytona Beach-Melbourne	2.6%	Atlanta	2.1%
Roanoke-Lynchburg	3.2%	Miami-Fort Lauderdale	2.6%	Los Angeles	2.1%
Baltimore	2.6%	Charleston, SC	2.5%	Charleston, SC	2.0%
Pittsburgh	2.3%	Birmingham (Anniston and Tuscaloosa)	2.0%	Orlando-Daytona Beach-Melbourne	1.9%
Atlanta	2.0%	Columbia, SC	1.8%	Columbia, SC	1.9%
Cleveland	1.9%	Roanoke-Lynchburg	1.7%	Knoxville	1.8%
Harrisonburg	1.9%	Columbus, GA	1.7%	Richmond-Petersburg	1.7%
Salisbury	1.5%	Philadelphia	1.5%	Norfolk-Portsmouth-Newport News	1.7%
Providence-New Bedford	1.3%	New York	1.4%	Philadelphia	1.5%
Greenville-Spartansburg-Asheville-Anderson	1.2%	Lexington	1.4%	Tampa-Saint Petersburg (Sarasota)	1.4%
Florence-Myrtle Beach	1.2%	Harrisburg-Lancaster-Lebanon-York	1.2%	Tri-Cities, TN-VA	1.4%

Overnight Travel Party Characteristics

Average Party Size

Coast visitor parties – 3.3, 37% of parties include children
Mountain visitor parties – 2.9, 32% of parties include children
Piedmont visitor parties – 2.6, 32% of parties include children

Average Age

Coast visitor – 44 years
Mountain visitor – 43 years
Piedmont visitor – 43 years

Marital Status

Coast visitor – 66% married
Mountain visitor – 61% married
Piedmont visitor – 54% married

Ethnicity

Coast visitor parties – 91% white, 5% black, 4% other
Mountain visitor parties – 90% white, 5% black, 5% other
Piedmont visitor parties – 78% white, 12% black, 10% other

Children in Household

Coast visitor – 32%
Mountain visitor – 26%
Piedmont visitor – 32%

Average Household Income

Coast visitor – \$90K
Mountain visitor – \$87K
Piedmont visitor – \$79K

Glossary of Terms

Travel - A trip over 50 miles one-way from home *or* any night away from home

Overnight Visitor - A visitor who spent at least one night away from home during travel

Daytripper - A visitor who did not spend any nights away from home, but traveled at least 50 miles one-way from home

Designated Market Area - Also referred to as a DMA and is a term used by Nielsen Media Research to identify an exclusive geographic area of counties in which the home market television stations hold a dominance of total hours viewed. There are 210 DMA's in the U.S.