

WAVE IV – OCTOBER 2021

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 IV of the study.

Survey Methodology

- A random sample of 1,200 North Carolina residents as defined below participated in the fourth of four 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 22 and October 4, 2021.
- 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

As hospitalizations and deaths due to COVID decrease and vaccination levels increase, the fourth wave of this study shows that while North Carolina residents are still cautious, their hesitancy to travel and welcome visitors into their communities is easing. When they do travel, residents will continue to expect safety protocols such as masks and proper distancing to be in place.

Residents understand the value of tourism to North Carolina and their communities and will be among the first to pump valuable tourism dollars back into the state's economy. For the remainder of 2021, 40% of residents, double that of Wave III, plan to take an overnight trip within North Carolina. Their travel will likely be to more rural, coastal and mountain destinations within driving distance of their homes.

While state and community efforts to ensure long term sustainability of the natural environment are influential when North Carolinians are choosing a destination, only about 25% of residents are familiar with the "Outdoor NC" initiative and somewhat more (40%) are familiar with the concept of "Leave No Trace". Of further note is that only about one in four residents think there is a litter problem in the state and that less than 20% are familiar with the "Swat a Litterbug" campaign.

Although the need for workers is apparent in North Carolina with 80% of residents reporting seeing more "help wanted" advertising, most residents (60%) do not plan to change the type of job they were doing before the pandemic.



/ Key Findings

- / Although easing, North Carolina residents remain committed to wearing masks, primarily to indoor events. Over half, down from 70% in Wave III, say they wear a mask to indoor events or activities. One-third still say they wear a mask whenever they leave the house, down from 60% in Wave III. In this fourth wave, residents continue to be unlikely to attend large events or visit large cities. While they are likely to take vacations in rural areas, they are unlikely to camp or stay in RV Parks or campgrounds.
- / Trust in Visit North Carolina, the official state travel and tourism office as well as local travel and tourism offices (CVB, Chamber of Commerce) to provide COVID-19 safety information became stronger in Wave IV, while faith in official agencies (CDC, Local health department and State government health agencies) declined. In a reversal, they are also relying more on friends and family for this type of information. The CDC is about even State government agencies (DHHS, etc.) as a trustworthy source for COVID-19 safety information.
- / North Carolina residents continue to view tourism as extremely important to the recovery of the North Carolina economy after COVID-19. However, residents remain cautious as they have only become slightly more interested in vacationing within North Carolina and are more comfortable with visitors coming into the state than into their communities.



/ Key Findings

- / 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. Being vaccinated and distancing as well as hand washing are also very important. Overall, it is clear, that requiring face masks and vaccinations will be essential in encouraging North Carolinians to visit destinations and attractions.
- / If North Carolina residents do travel in 2021, 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 within the state and visit more rural areas including North Carolina state parks.
- / Almost half of North Carolina's residents have taken an overnight trip within the state since March 1, 2020. And, about 40%, double that of Wave III, have plans to take an overnight trip within North Carolina by December 31, 2021.
- / Protection of North Carolina's environment is important to an overwhelming percentage (75%) of residents. They also feel that North Carolina should work to maintain its outdoor spaces for the enjoyment of the public.



/ Key Findings

- / As a result of the pandemic, outdoor activity participation levels increased only slightly. This was primarily due to reduced activity among those 55 and older. Conversely, outdoor activity levels increased among residents aged 54 and younger. Once the pandemic is perceived to be over, participation among all residents is expected to increase.
- / Although somewhat less than in Wave 1, state or community efforts to ensure long term sustainability of the natural environment are influential when North Carolinians are choosing a destination.
- / Four in 10 residents are familiar with the concept of *Leave No Trace*. An overwhelming majority of those (78%) feel it is important for all visitors/travelers to practice *Leave No Trace* and that doing so protects the environment for future generations to enjoy (72%) and enhances outdoor experiences (71%).
- / Approximately one-quarter of North Carolina residents are familiar with the *Outdoor NC* initiative, which is designed to ensure North Carolina's treasured outdoor resources continue to thrive for residents and visitors. Residents aged 55 years or older are by far the least familiar with the *Outdoor NC* initiative, while those living in the state 5-10 years are most familiar with the initiative.



/ Key Findings

- / Down from 40% in Wave I, one-third of residents, particularly younger residents, think North Carolina's sustainability efforts are better than other states they have visited.
- / Except for those living in the Coastal region, North Carolina residents generally don't think over-tourism is a problem in their communities. However, those that do think it is a problem are likely to be younger.
- / One in four residents think litter is a problem in their community and any litter that is created is done so by residents themselves. Six in ten residents think litter makes their community less desirable to visitors and only 30% of residents think litter in their community is generated by visitors.
- / Less than 20% of North Carolina residents are familiar with the *Swat a Litterbug* campaign. The younger residents are, the more aware they are of the campaign.
- / Almost 60% of residents say they have experienced long waits in restaurants as a result of staffing shortages. This is not surprising since almost 80% report seeing a lot more "help wanted" signs or advertising.



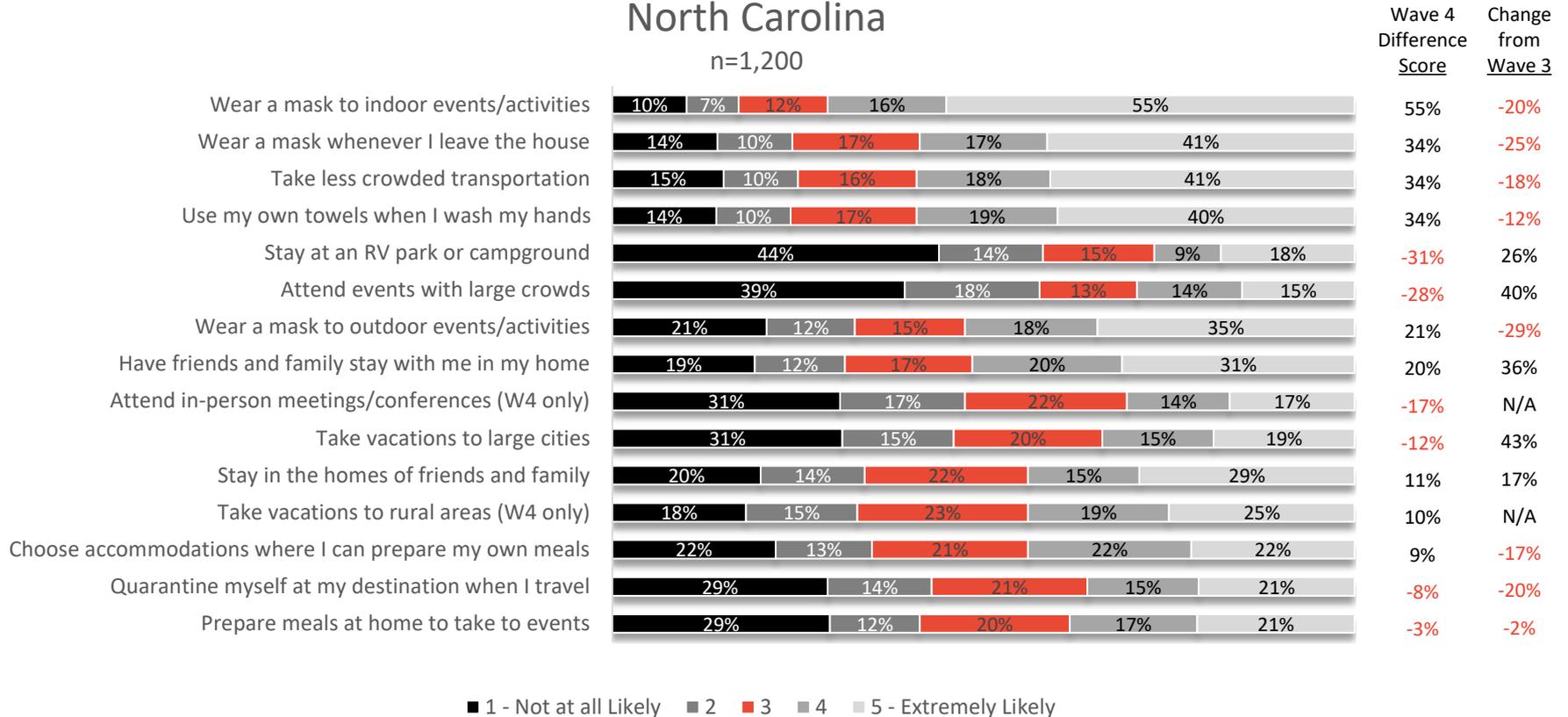
/ Key Findings

- / Most residents (60%), say that they are not planning to look for a job doing something different that they were doing before the pandemic. However, those that are tend to be younger and have lived in the state the least amount of time.
- / More than 6 in 10 residents feel that tourism has an impact on the economic growth of North Carolina and its communities. In particular, they feel that tourism supports small, local businesses as well as destination infrastructure.
- / Residents are most interested in seeing promotional advertising for the state of North Carolina followed by destinations within the state and the communities in which they live. Residents aged 35-54 are the most interested in seeing advertising that promotes all parts of the state.

COVID-19

Although Easing, North Carolina Residents are Still Likely to Wear Masks to Indoor events

North Carolina n=1,200



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

North Carolina Residents of All Ages are Still Committed to Wearing Masks in All Situations

North Carolina Difference Scores (%)

	18-34 n=223	35-54 n=386	55+ n=589
Wear a mask to indoor events/activities	58	44	61
Wear a mask whenever I leave the house	57	24	25
Take less crowded transportation	28	39	34
Use my own towels when I wash my hands	48	35	24
Stay at an RV park or campground	-22	-4	-58
Attend events with large crowds	-28	-8	-44
Wear a mask to outdoor events/activities	43	14	9
Have friends and family stay with me in my home	24	21	15
Attend in-person meetings/conferences (W4 only)	-8	1	-37
Take vacations to large cities	-15	4	-22
Stay in the homes of friends and family	19	14	3
Take vacations to rural areas (W4 only)	7	20	6
Choose accommodations where I can prepare my own meals	29	15	-10
Quarantine myself at my destination when I travel	42	-15	-39
Prepare meals at home to take to events	15	4	-23

Q1: Using a scale of 1 (not at all likely) to 5 (extremely likely), as a result of your COVID-19 experience, and current conditions, 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

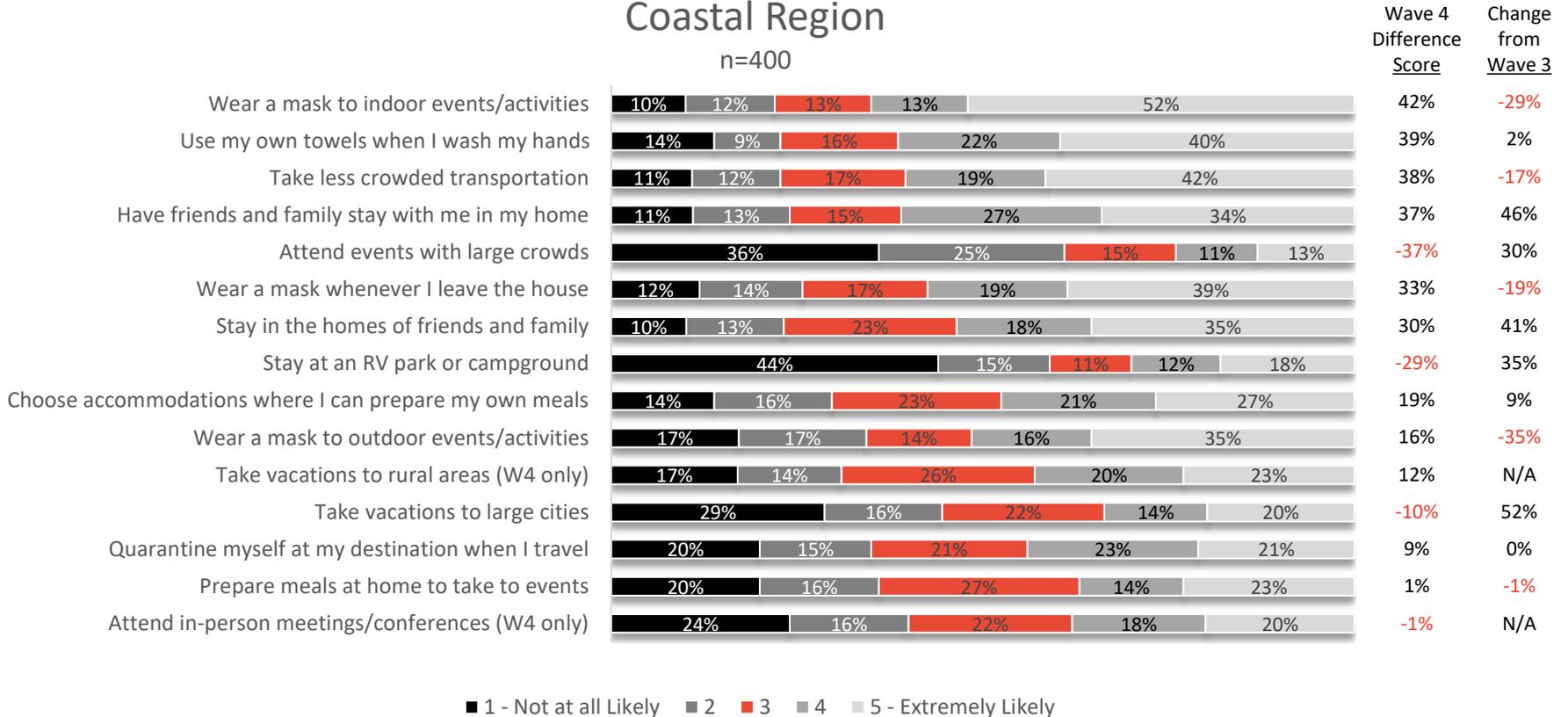
North Carolina Difference Scores (%)

	<5 Years n=154	5-10 Years n=161	11-20 Years n=194	20+ Years n=303	Born in NC n=388
Wear a mask to indoor events/activities	50	53	72	46	56
Wear a mask whenever I leave the house	43	24	43	32	33
Take less crowded transportation	14	61	49	29	29
Use my own towels when I wash my hands	38	46	48	17	34
Stay at an RV park or campground	-37	4	-52	-35	-32
Attend events with large crowds	-33	3	-41	-35	-30
Wear a mask to outdoor events/activities	19	21	40	9	22
Have friends and family stay with me in my home	42	51	24	7	6
Attend in-person meetings/conferences (W4 only)	-29	13	-29	-12	-22
Take vacations to large cities	-34	25	-9	-7	-21
Stay in the homes of friends and family	22	37	18	5	-2
Take vacations to rural areas (W4 only)	20	39	-15	0	10
Choose accommodations where I can prepare my own meals	14	21	14	-1	7
Quarantine myself at my destination when I travel	-8	6	-2	-26	-3
Prepare meals at home to take to events	18	22	-7	-17	-11

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

Activity Engagement as a Result of COVID-19

Coastal Region n=400

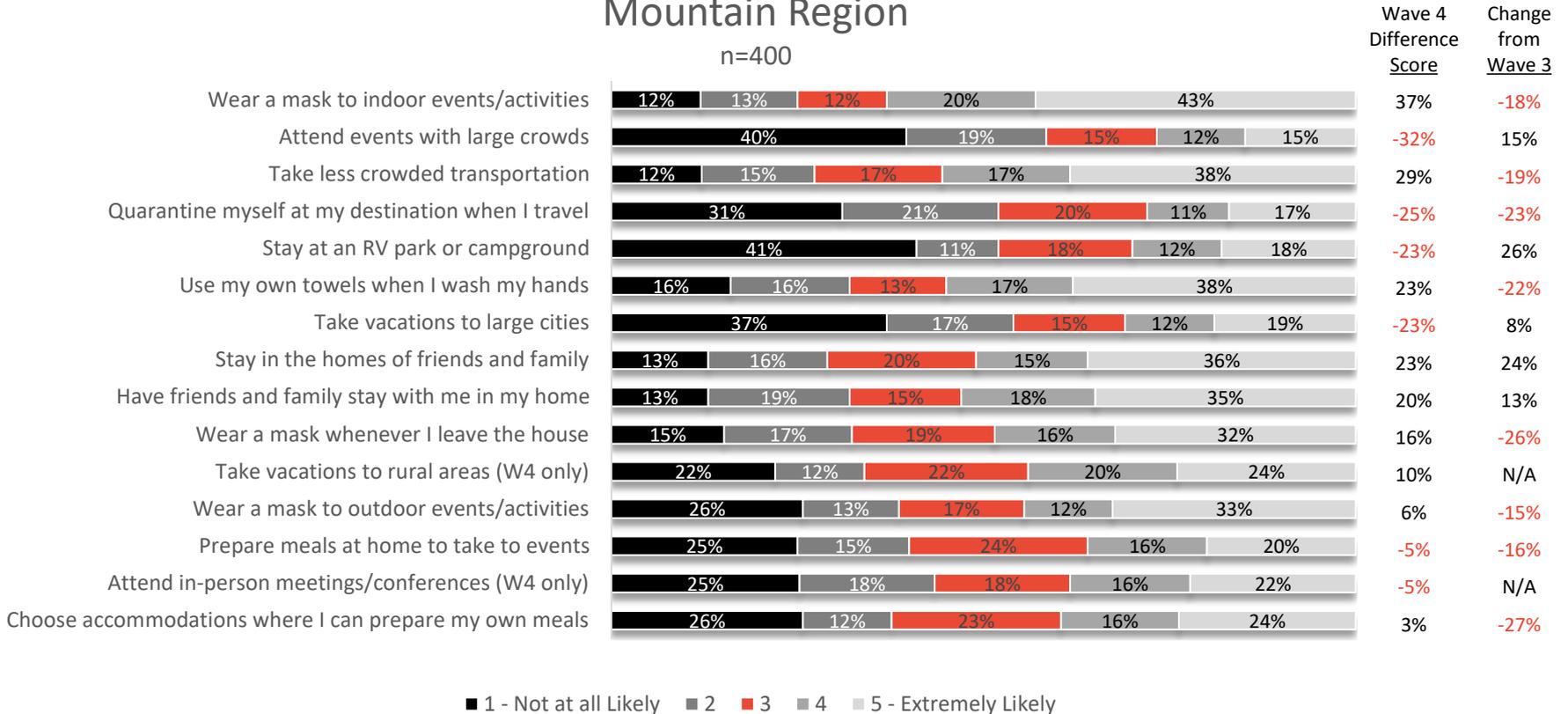


Q1: Using a scale of 1 (not at all likely) to 5 (extremely likely), as a result of your COVID-19 experience, and current conditions, please indicate how likely you are to do each of the following?

Activity Engagement as a Result of COVID-19

Mountain Region

n=400

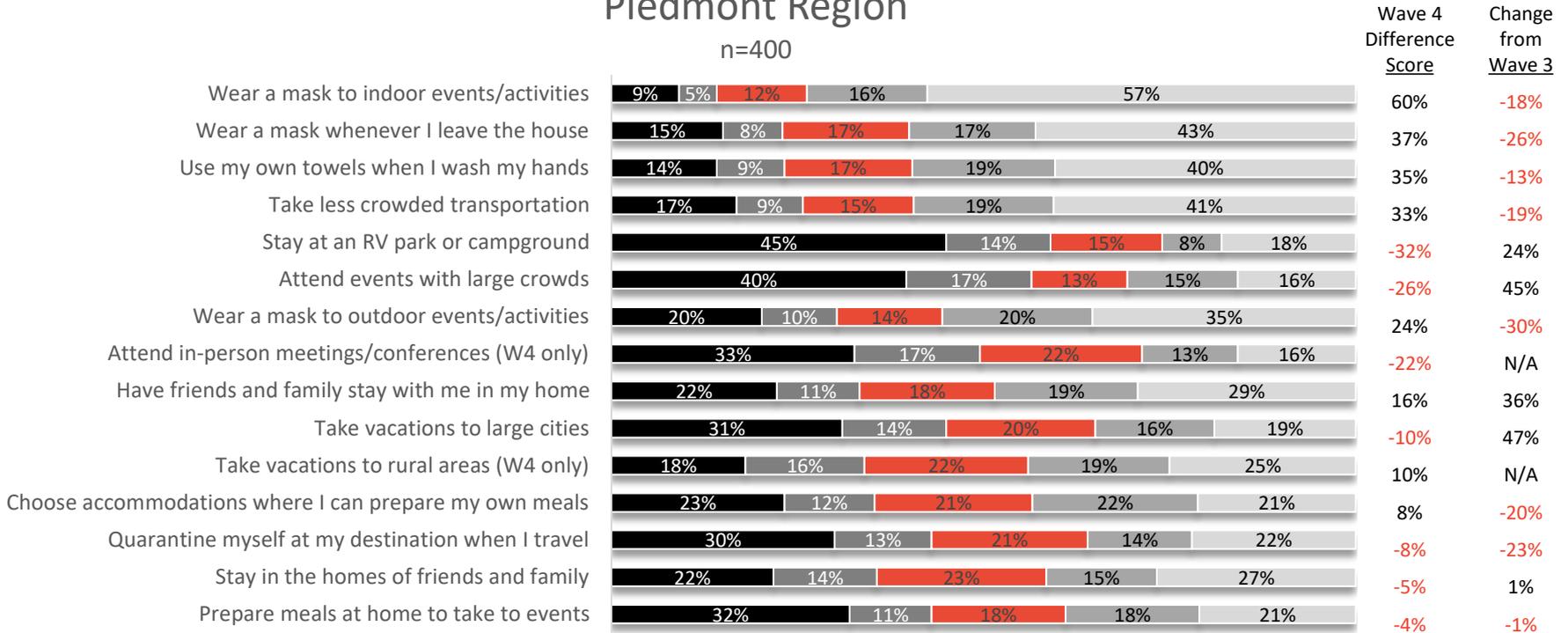


Q1: Using a scale of 1 (not at all likely) to 5 (extremely likely), as a result of your COVID-19 experience, and current conditions, please indicate how likely you are to do each of the following?

Activity Engagement as a Result of COVID-19

Piedmont Region

n=400

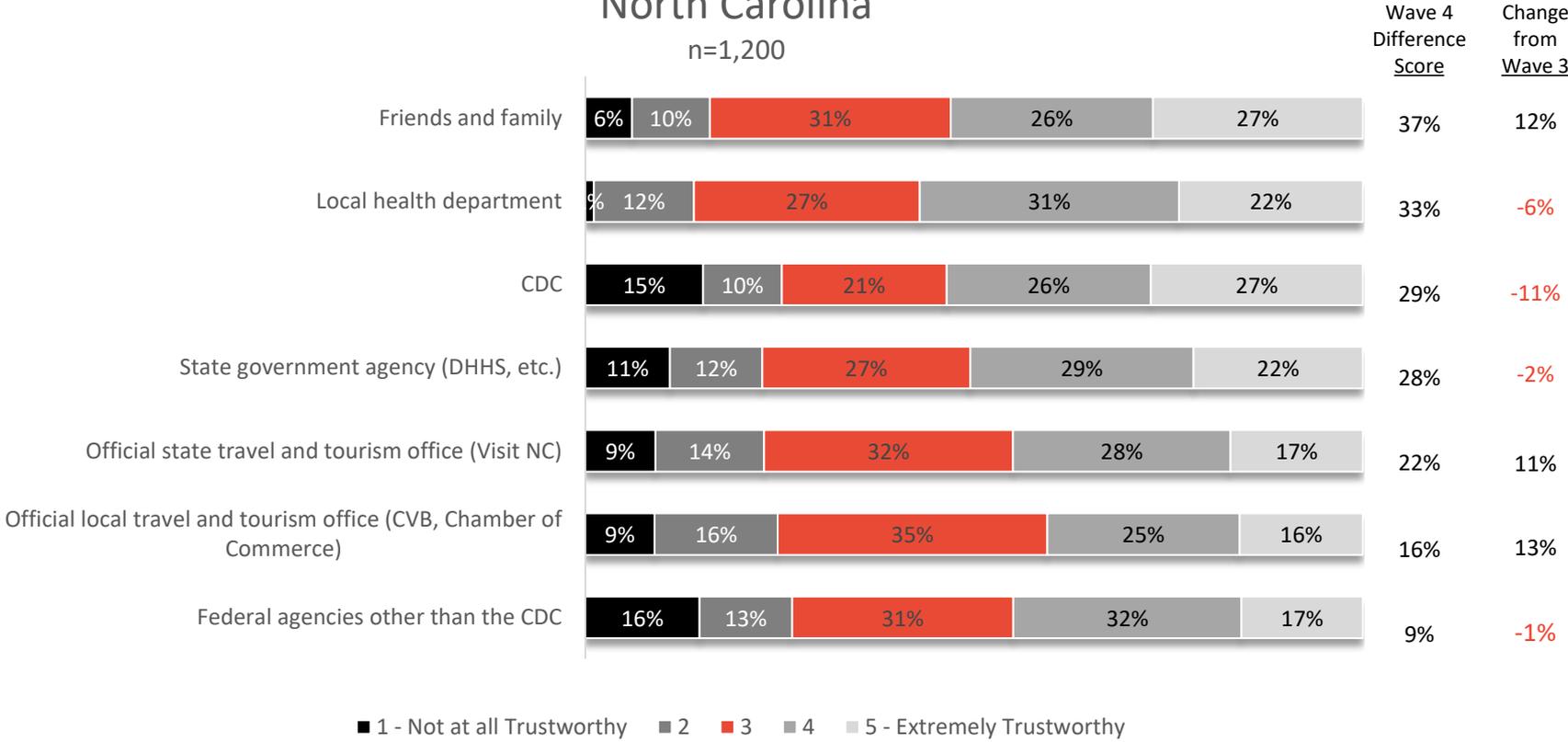


■ 1 - Not at all Likely ■ 2 ■ 3 ■ 4 ■ 5 - Extremely Likely

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

State and Local Tourism Offices Became More Trusted Sources of COVID-19 Safety Information; Government Agencies Lost Trust

North Carolina n=1,200



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)

Residents Aged 35-54 Most Likely to Trust State and Local Tourism Offices for COVID-19 Safety Information

North Carolina Difference Scores (%)

	18-34 n=223	35-54 n=386	55+ n=589
Friends and family	37	37	36
Local health department	18	33	45
CDC	36	24	26
State government agency (DHHS, etc.)	32	27	25
Official local travel and tourism office (CVB, Chamber of Commerce)	16	19	14
Official state travel and tourism office (Visit NC)	18	26	22
Federal agencies other than the CDC	9	10	8

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)

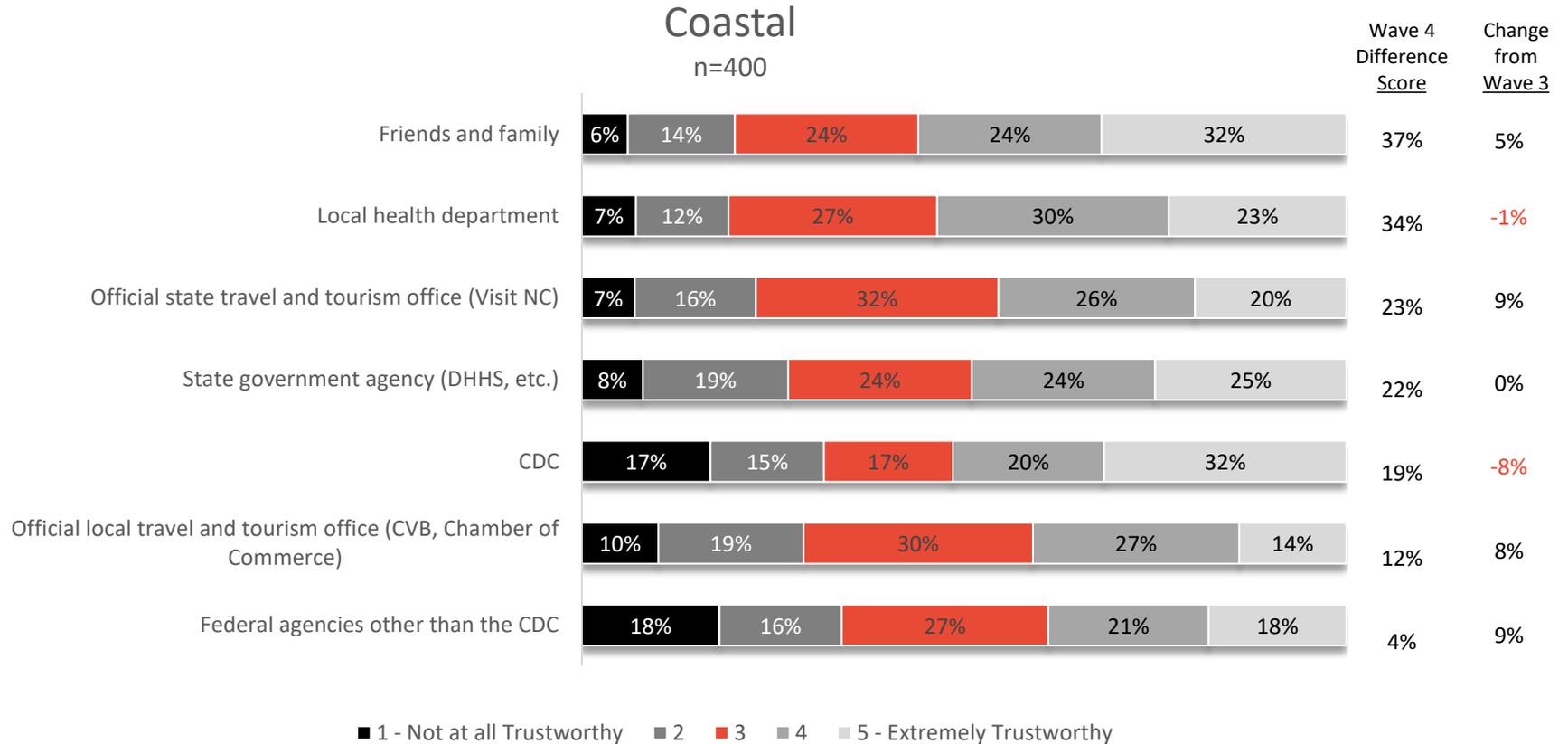
Newest Residents Have Most Trust in State and Local Tourism Offices and State Government Agencies

North Carolina Difference Scores (%)

	<5 Years n=154	5-10 Years n=161	11-20 Years n=194	20+ Years n=303	Born in NC n=388
Friends and family	29	49	25	20	49
Local health department	14	57	30	37	31
CDC	39	44	29	31	18
State government agency (DHHS, etc.)	39	45	29	21	21
Official local travel and tourism office (CVB, Chamber of Commerce)	32	29	1	10	14
Official state travel and tourism office (Visit NC)	37	30	12	24	17
Federal agencies other than the CDC	17	15	13	12	2

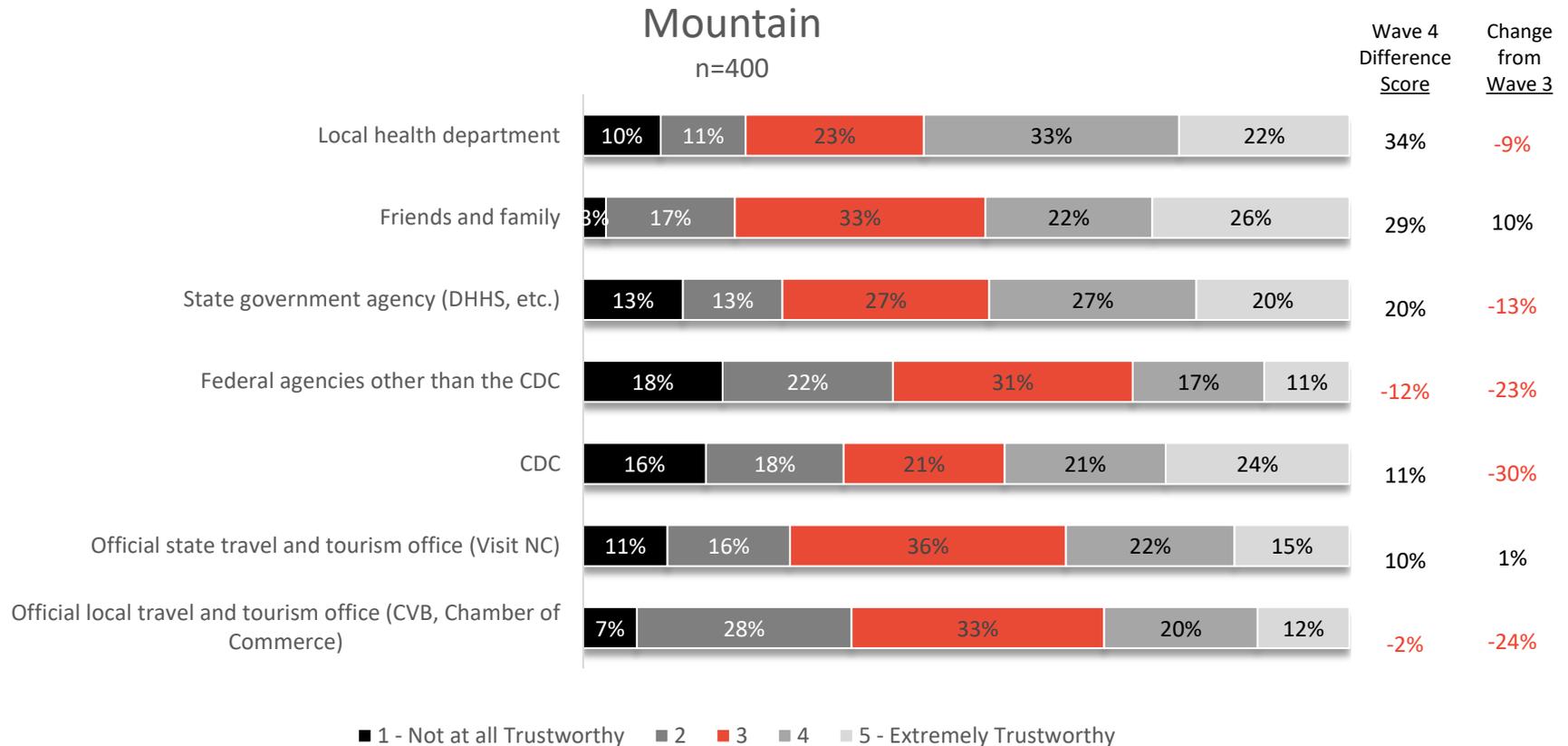
Q1a: Using a scale of 1 (not at all trustworthy) to 5 (extremely trustworthy), when planning your travel, please rate how trustworthy you feel each of the following is for providing COVID-19 safety information. (Question added W2)

Trustworthy Sources of Information



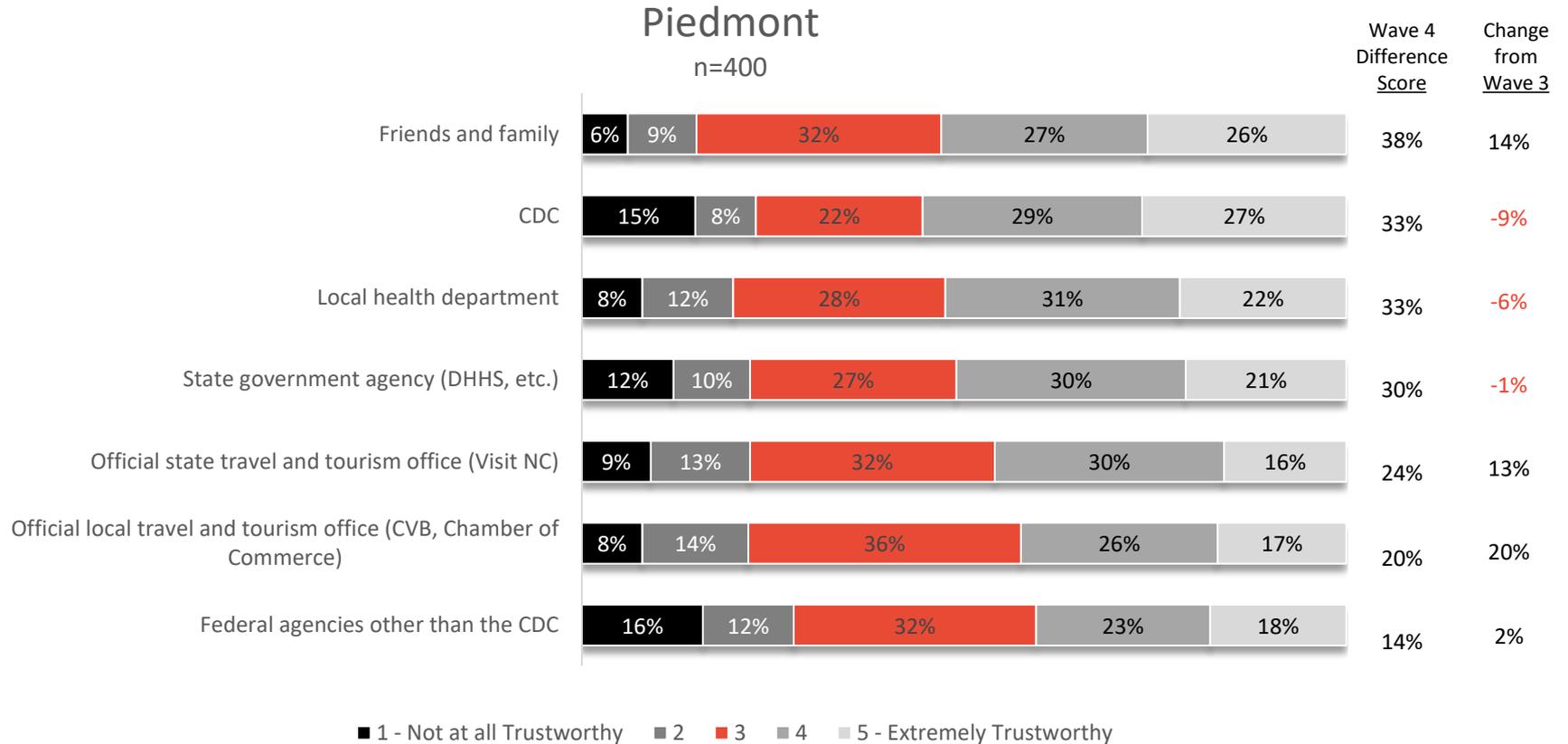
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Trustworthy Sources of Information



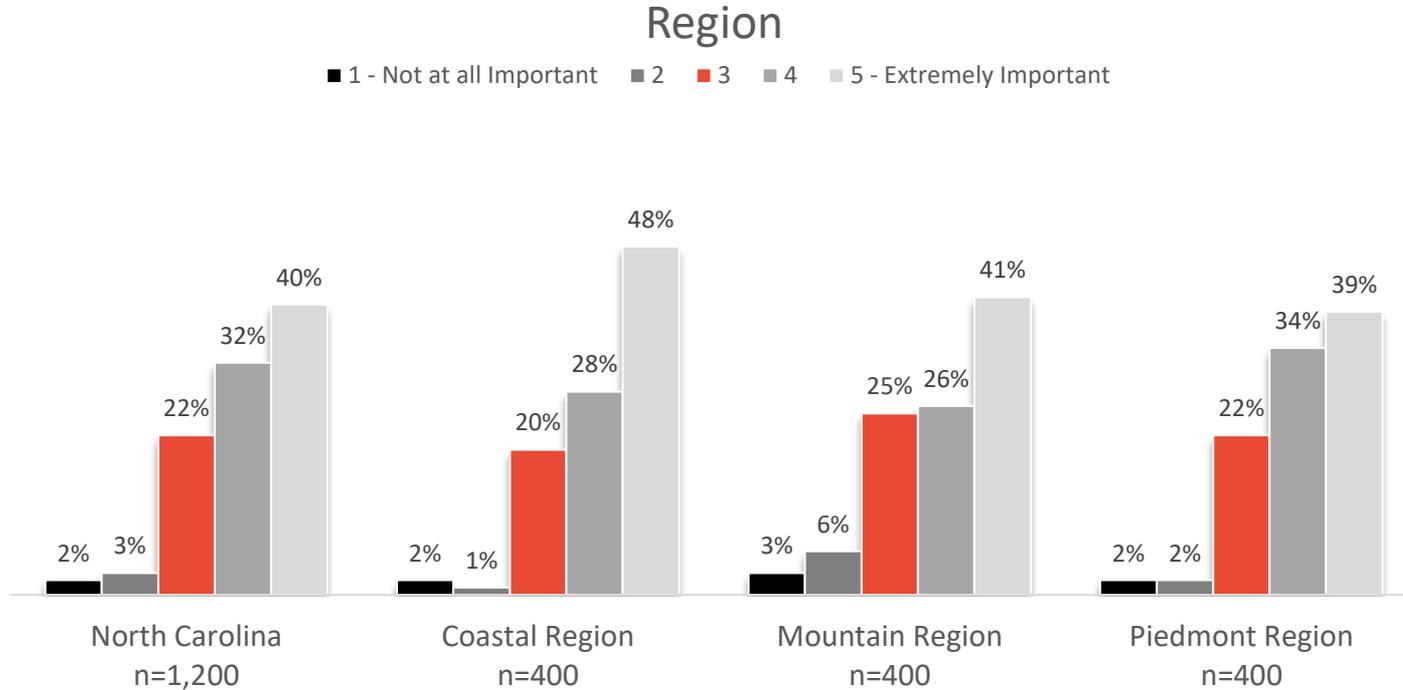
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Trustworthy Sources of Information



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)

Perceived Importance of Tourism to North Carolina's Post-COVID-19 Recovery Declined in Wave 4, but Still Strong



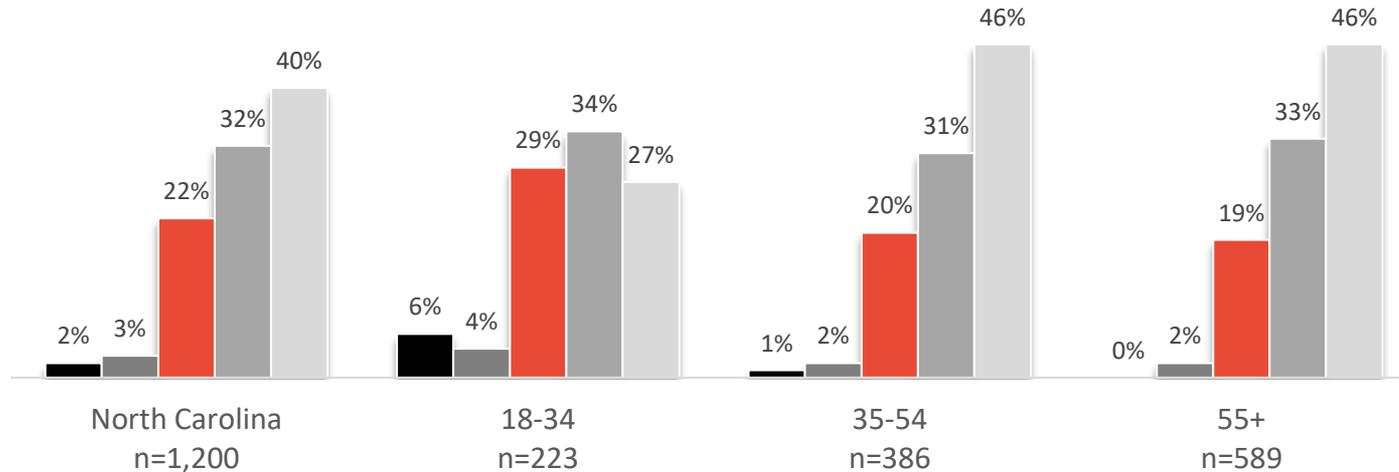
Difference Score	68%	72%	58%	68%
Change from Wave 3	-3%	6%	-21%	-3%

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?

Residents Aged 35 and Older View Tourism as More Important to North Carolina's Post-COVID-19 Recovery Than Younger Residents

Resident Age

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



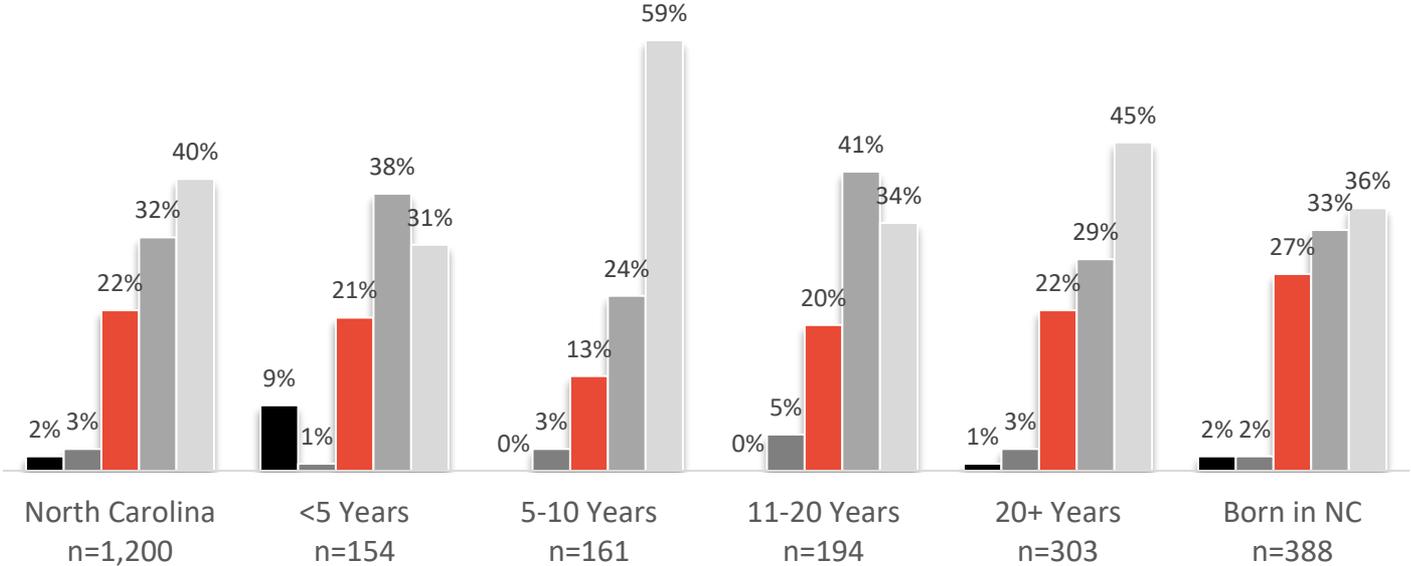
Difference Score	68%	50%	73%	77%
Change from Wave 3	-3%	-14%	-1%	2%

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?

The Importance of Tourism to North Carolina's Post-COVID-19 Recovery Is Strongest Among Those Living in the State 5+ Years

Length of Residency

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



Difference Score	68%	58%	80%	71%	69%	65%
Change from Wave 2	-3%	-10%	21%	-2%	-14%	-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?

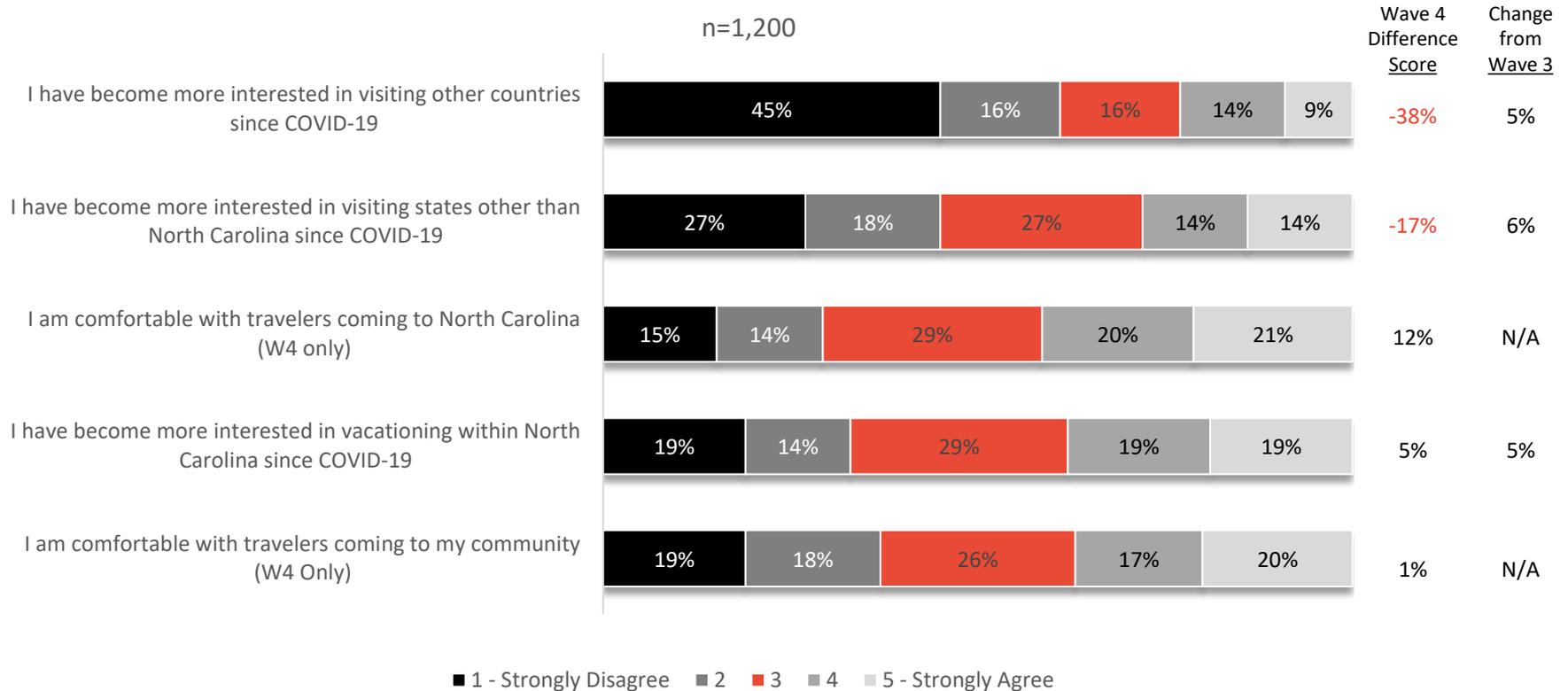
Wearing Masks, Being Vaccinated and Distancing are Most Often Cited Safety Protocols Essential for Travel After COVID-19



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

Residents More Comfortable with Travelers in the State than in Their Community; Not Interested in Traveling Outside North Carolina

North Carolina
n=1,200



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

Residents Aged 35-54 Most Interested in Welcoming Travelers and Traveling within North Carolina Themselves

North Carolina Difference Scores (%)

	18-34 n=223	35-54 n=386	55+ n=589
I have become more interested in visiting other countries since COVID-19	-7	-28	-69
I have become more interested in visiting states other than North Carolina since COVID-19	-1	-5	-38
I am comfortable with travelers coming to North Carolina (W4 only)	5	27	5
I have become more interested in vacationing within North Carolina since COVID-19	2	11	3
I am comfortable with travelers coming to my community (W4 only)	-4	18	-8

Q4: Using a scale of 1 (strongly disagree) to 5 (strongly agree), please indicate your current 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 5-10 Years Most Positive on Visitors Coming into the State and on Traveling Themselves

North Carolina Difference Scores (%)

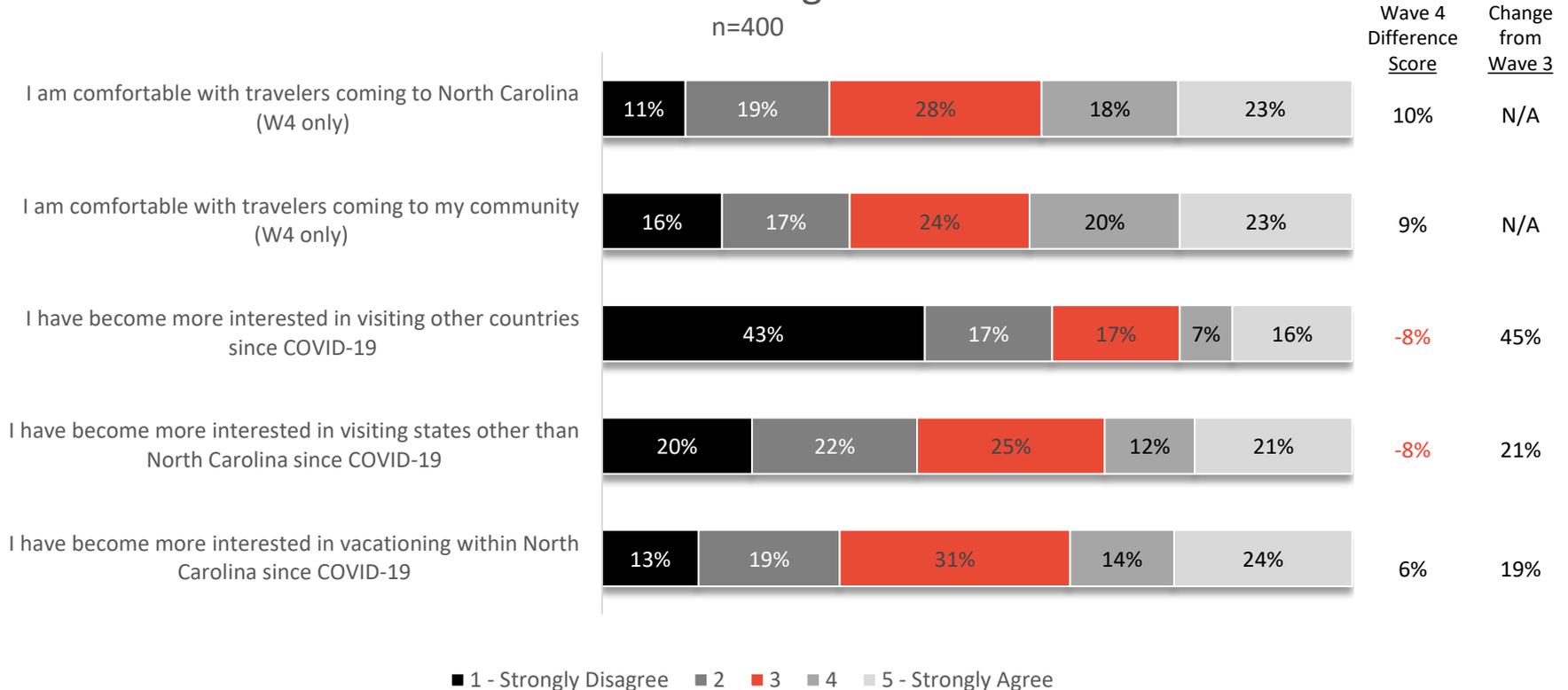
	<5 Years n=154	5-10 Years n=161	11-20 Years n=194	20+ Years n=303	Born in NC n=388
I have become more interested in visiting other countries since COVID-19	-19	-6	-42	-51	-47
I have become more interested in visiting states other than North Carolina since COVID-19	-17	12	-24	-26	-20
I am comfortable travelers coming to North Carolina (W4 only)	6	44	-5	16	5
I have become more interested in vacationing within North Carolina since COVID-19	-1	40	-15	-3	6
I am comfortable with travelers coming to my community (W4 only)	-10	28	-10	4	-3

Q4: Using a scale of 1 (strongly disagree) to 5 (strongly agree), please indicate your current 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

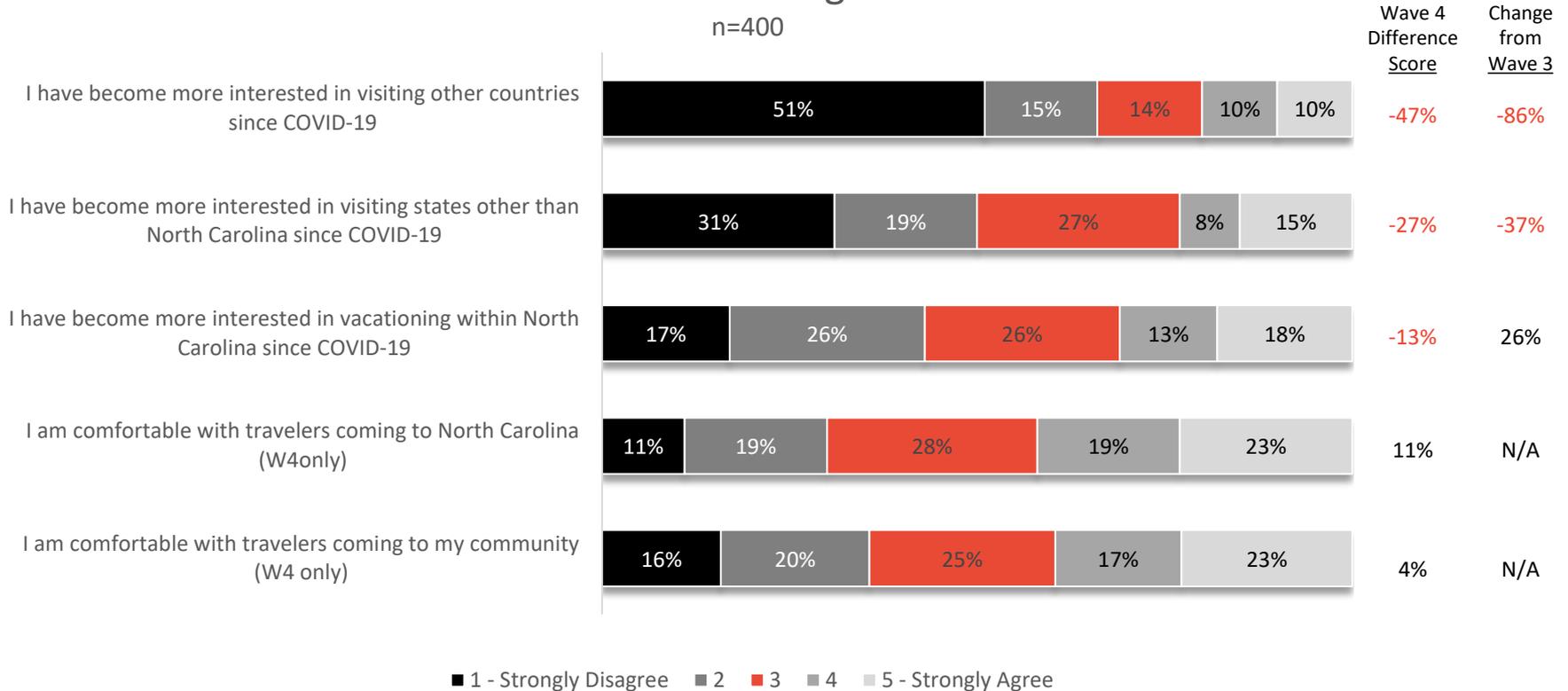


Q4: Using a scale of 1 (strongly disagree) to 5 (strongly agree), please indicate your current level of agreement with each of the following statements now that the North Carolina COVID-19 restrictions are beginning to ease.

Interest in Traveling and Welcoming Visitors

Mountain Region

n=400

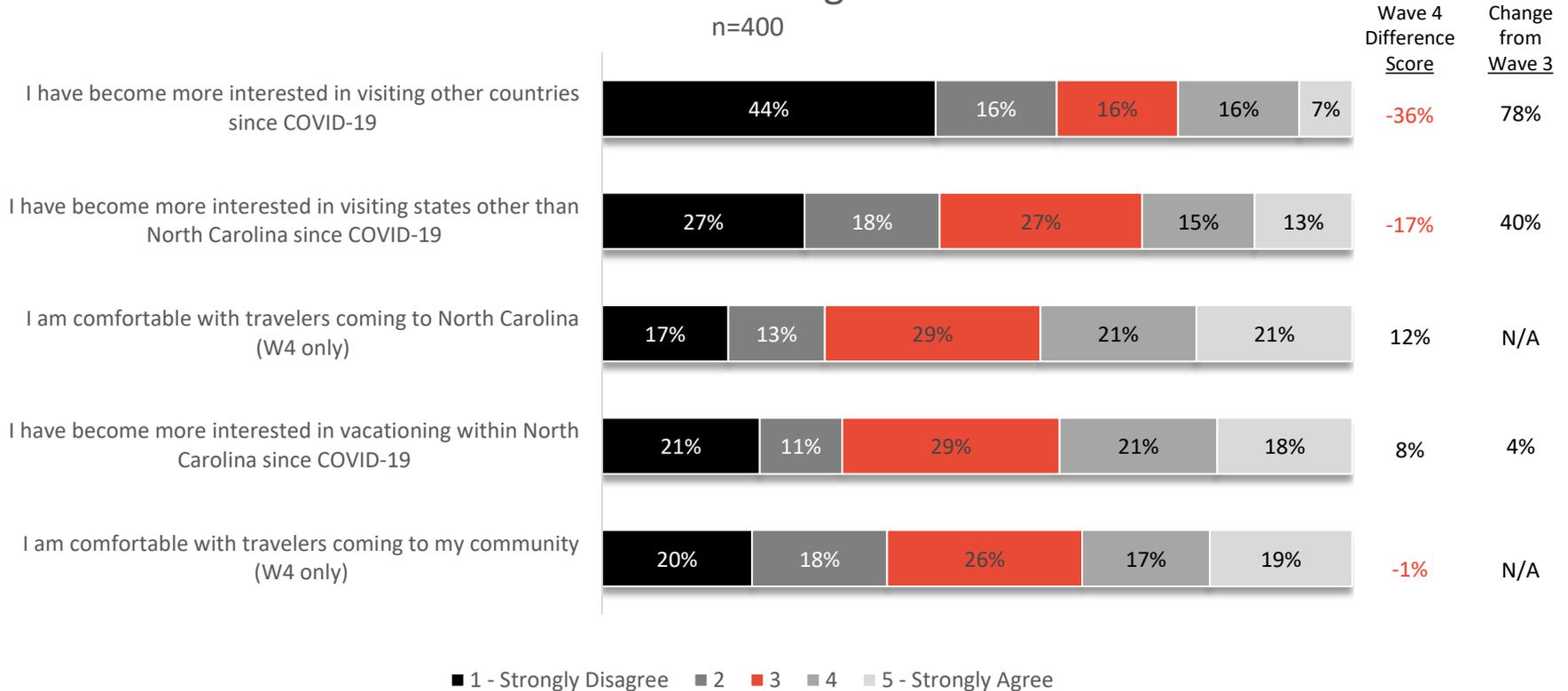


Q4: Using a scale of 1 (strongly disagree) to 5 (strongly agree), please indicate your current level of agreement with each of the following statements now that the North Carolina COVID-19 restrictions are beginning to ease.

Interest in Traveling and Welcoming Visitors

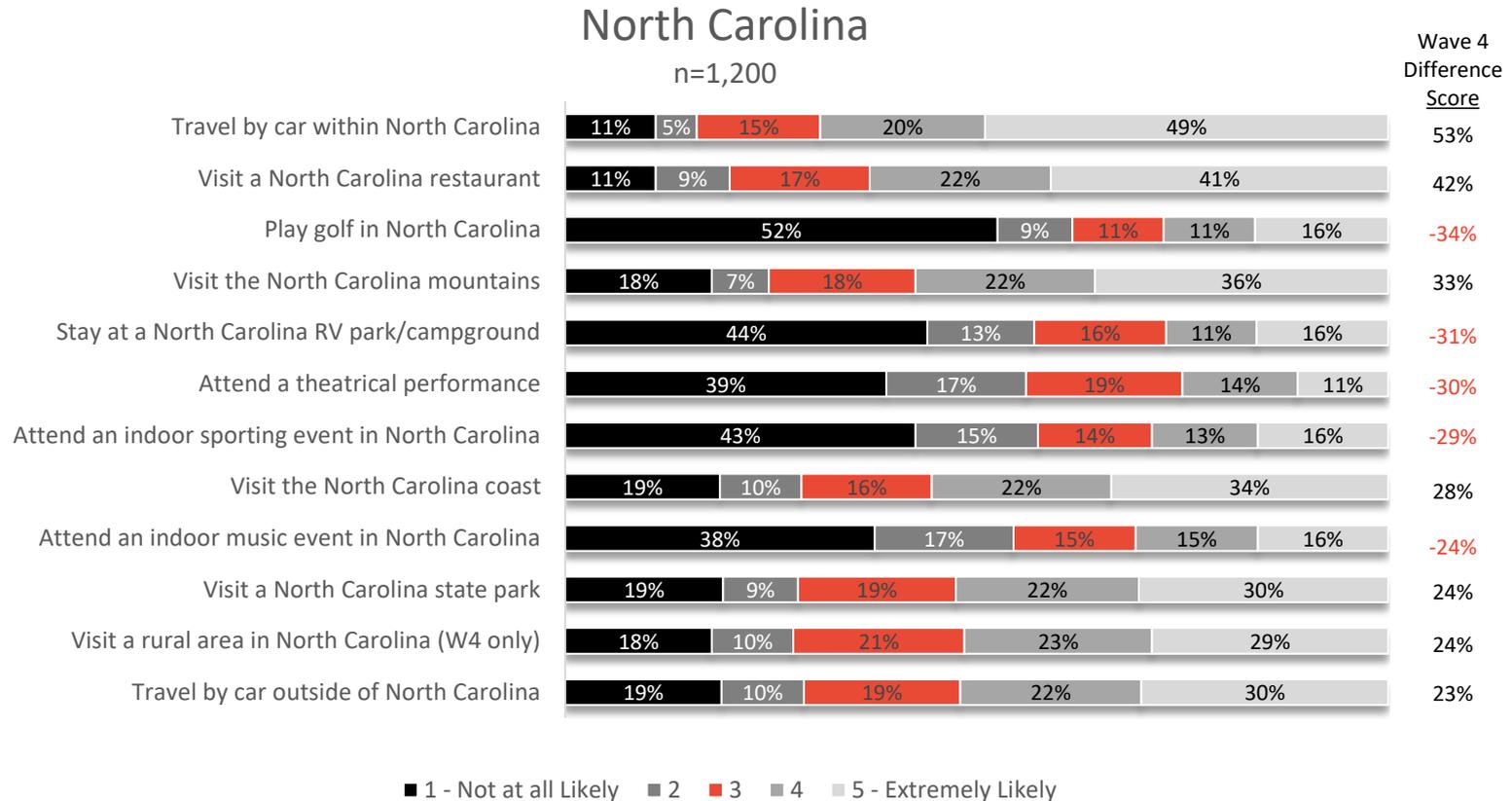
Piedmont Region

n=400



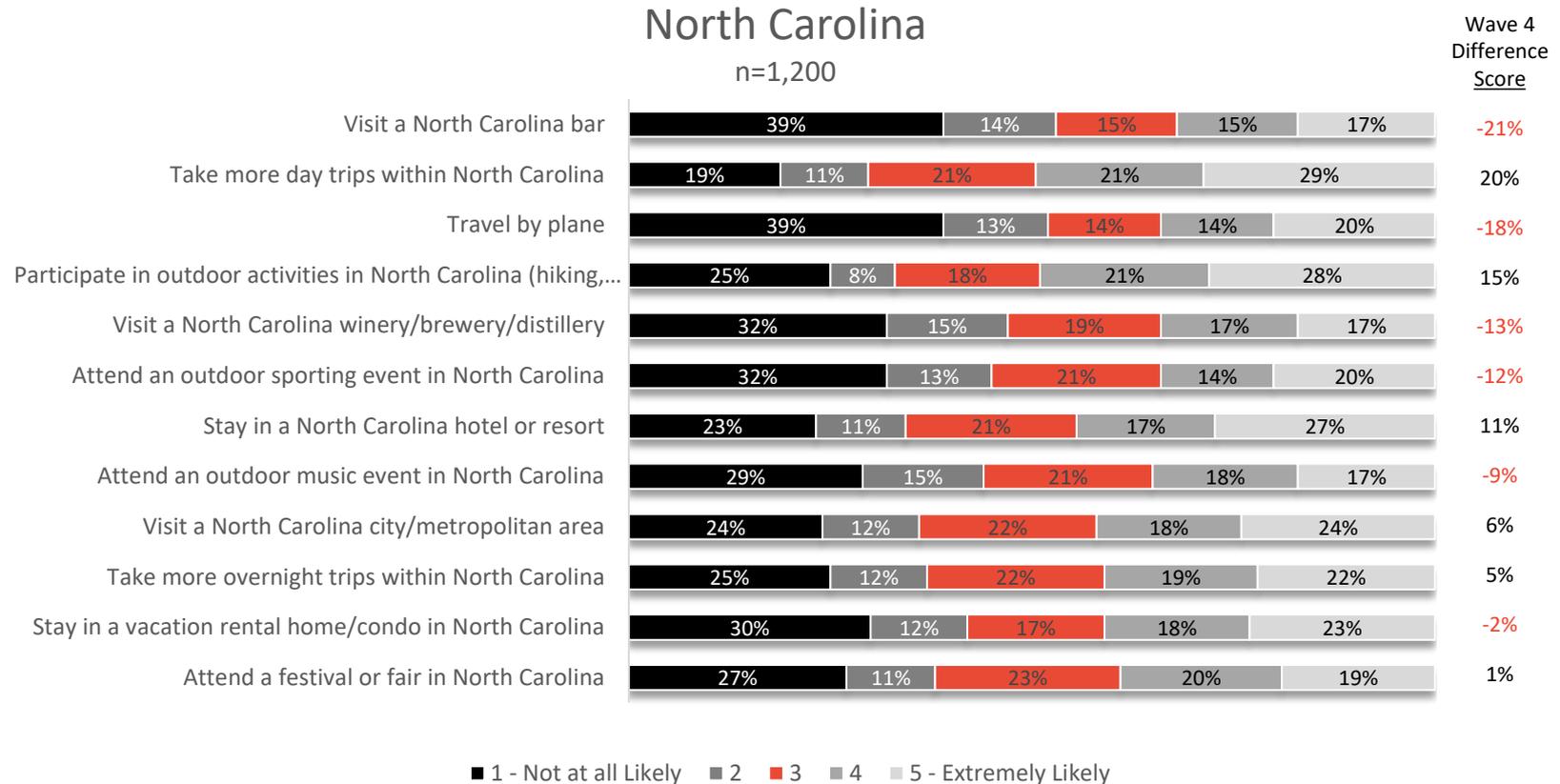
Q4: Using a scale of 1 (strongly disagree) to 5 (strongly agree), please indicate your current level of agreement with each of the following statements now that the North Carolina COVID-19 restrictions are beginning to ease.

Traveling by Car to North Carolina Outdoor Destinations Still Most Likely Through the End of 2021



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 through the end of 2021 given the current status of the pandemic. (Question revised W4)

Traveling by Car to North Carolina Outdoor Destinations Still Most Likely Through the End of 2021



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 through the end of 2021 given the current status of the pandemic. (Question revised W4)

Older Residents Least Likely to Engage in Most Activities Through the End of 2021

North Carolina Difference Scores (%)

	18-34 n=223	35-54 n=386	55+ n=589
Travel by car within North Carolina	36	63	59
Visit a North Carolina restaurant	24	54	47
Play golf in North Carolina	-21	-26	-51
Visit the North Carolina mountains	25	44	31
Stay at a North Carolina RV park/campground	-15	-10	-58
Attend a theatrical performance	-5	-31	-49
Attend an indoor sporting event in North Carolina	-12	-11	-57
Visit the North Carolina coast	20	47	19
Attend an indoor music event in North Carolina	-4	-5	-54
Visit a North Carolina state park	20	45	10
Visit a rural area in North Carolina (W4 only)	19	34	20
Travel by car outside of North Carolina	17	34	18

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 through the end of 2021 given the current status of the pandemic. (Question revised W4)

Older Residents Least Likely to Engage in Most Activities Through the End of 2021

North Carolina Difference Scores (%)

	18-34 n=223	35-54 n=386	55+ n=589
Visit a North Carolina bar	-20	5	-42
Take more day trips within North Carolina	9	38	14
Travel by plane	-10	-6	-34
Participate in outdoor activities in North Carolina (hiking, biking, kayaking, etc.)	20	27	2
Visit a North Carolina winery/brewery/distillery	-9	1	-2
Attend an outdoor sporting event in North Carolina	--	-4	-27
Stay in a North Carolina hotel or resort	3	29	2
Attend an outdoor music event in North Carolina	12	4	-34
Visit a North Carolina city/metropolitan area	-5	26	-3
Take more overnight trips within North Carolina	4	21	-8
Stay in a vacation rental home/condo in North Carolina	4	28	-30
Attend a festival or fair in North Carolina	16	17	-23

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 Living in the State Ten Years or Less are the Most Likely to Engage in Most Activities Through the End of 2021

North Carolina

Difference Scores (%)

	<5 Years n=154	5-10 Years n=161	11-20 Years n=194	20+ Years n=303	Born in NC n=388
Travel by car within North Carolina	63	68	53	45	48
Visit a North Carolina restaurant	24	54	39	38	48
Play golf in North Carolina	-32	-3	-47	-51	-34
Visit the North Carolina mountains	20	60	12	34	35
Stay at a North Carolina RV park/campground	-34	-20	-58	-33	-23
Attend a theatrical performance	-3	-4	-49	-50	-32
Attend an indoor sporting event in North Carolina	-10	4	-51	-43	-34
Visit the North Carolina coast	42	59	-8	23	26
Attend an indoor music event in North Carolina	-10	4	-44	-33	-29
Visit a North Carolina state park	43	62	-11	22	15
Visit a rural area in North Carolina (W4 only)	36	50	1	20	19
Travel by car outside of North Carolina	42	45	23	10	15

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 through the end of 2021 given the current status of the pandemic. (Question revised W4)

Residents Living in the State Ten Years or Less are the Most Likely to Engage in Most Activities Through the End of 2021

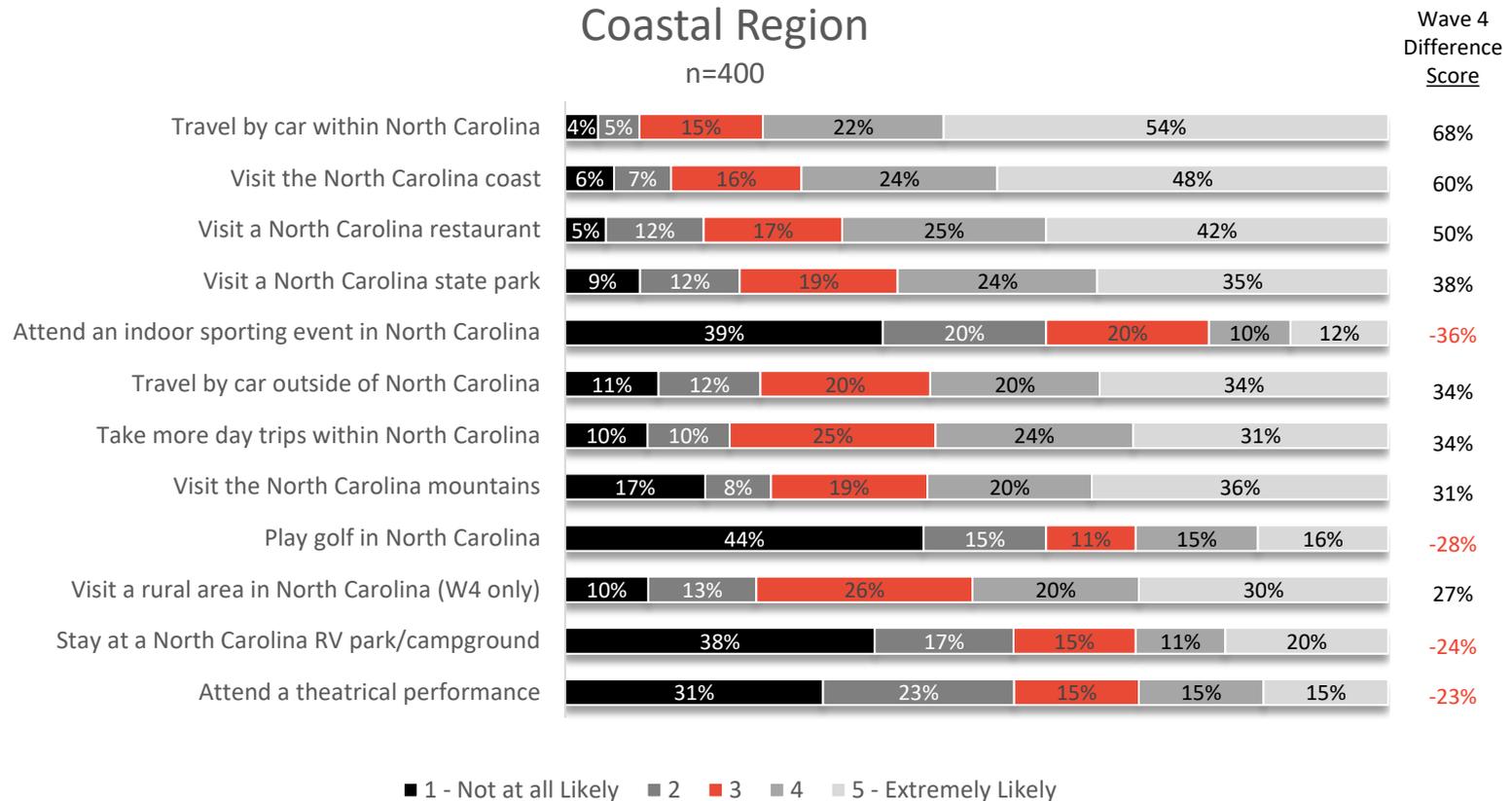
North Carolina

Difference Scores (%)

	<5 Years n=154	5-10 Years n=161	11-20 Years n=194	20+ Years n=303	Born in NC n=388
Visit a North Carolina bar	-31	11	-25	-27	-25
Take more day trips within North Carolina	28	43	2	17	16
Travel by plane	15	3	-25	-22	-34
Participate in outdoor activities in North Carolina (hiking, biking, kayaking, etc.)	49	28	-5	11	6
Visit a North Carolina winery/brewery/distillery	-1	13	-21	-26	-16
Attend an outdoor sporting event in North Carolina	5	1	-25	-16	-16
Stay in a North Carolina hotel or resort	24	41	-14	-6	12
Attend an outdoor music event in North Carolina	--	24	-26	-22	-10
Visit a North Carolina city/metropolitan area	3	40	-8	7	-3
Take more overnight trips within North Carolina	24	22	-22	-5	5
Stay in a vacation rental home/condo in North Carolina	-2	31	-33	-10	--
Attend a festival or fair in North Carolina	22	24	-13	-13	-2

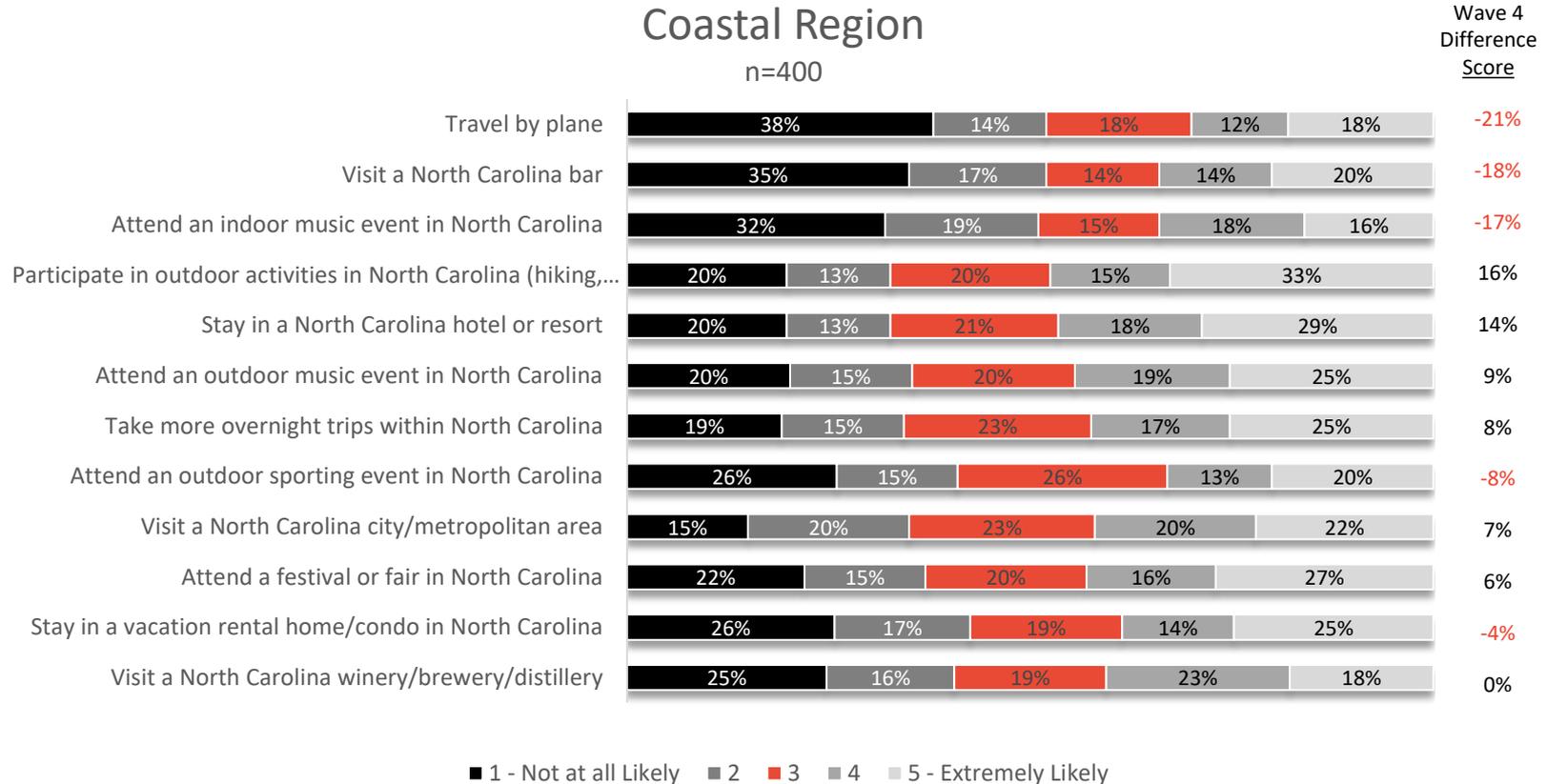
Q5: Using a scale of 1 (not at all likely) to 5 (extremely likely), please indicate how likely you are to engage in each of the following activities through the end of 2021 given the current status of the pandemic. (Question revised W4)

Travel Activities Through the End of 2021



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 through the end of 2021 given the current status of the pandemic. (Question revised W4)

Travel Activities Through the End of 2021

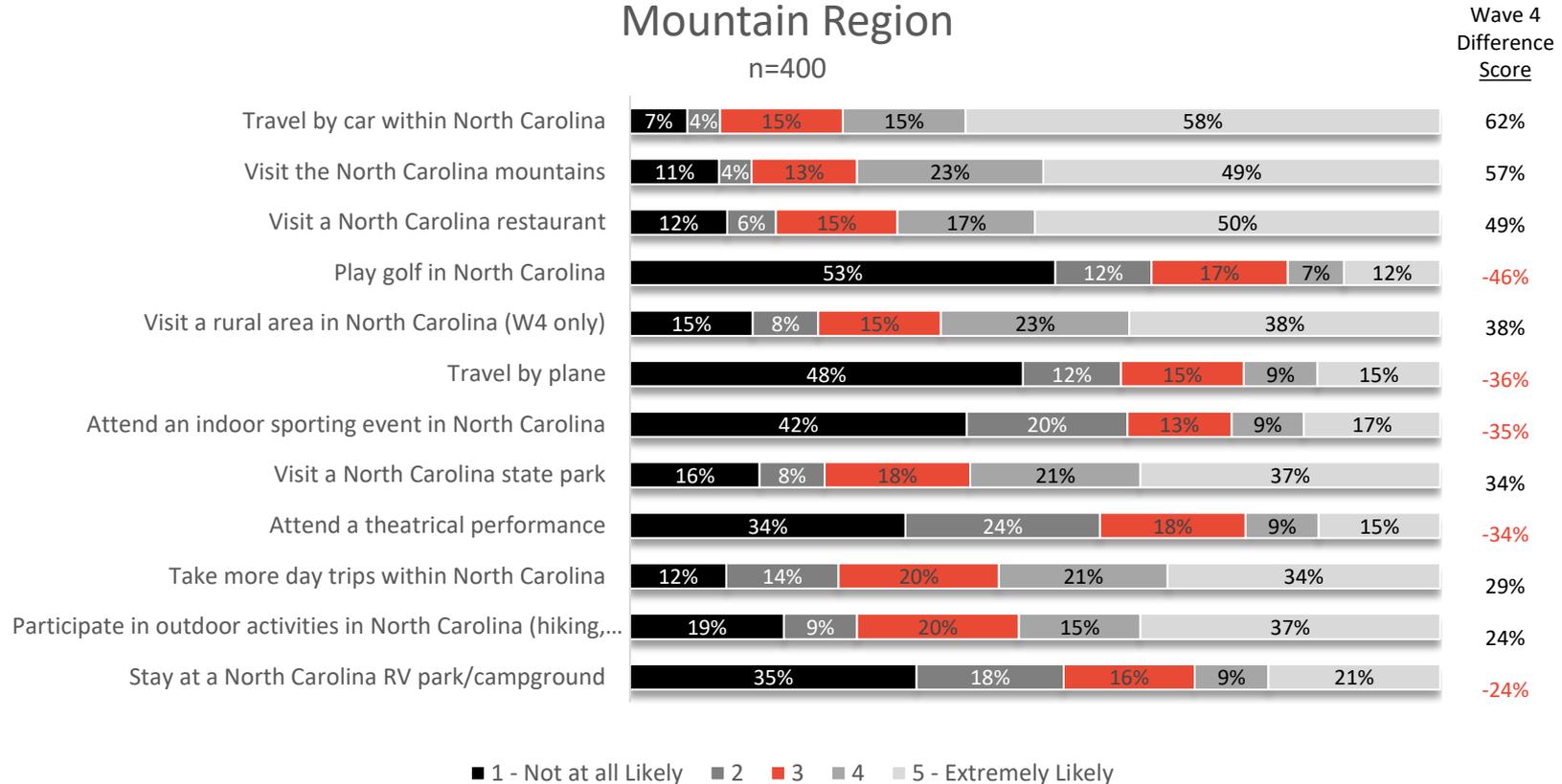


Q5: Using a scale of 1 (not at all likely) to 5 (extremely likely), please indicate how likely you are to engage in each of the following activities through the end of 2021 given the current status of the pandemic. (Question revised W4)

Travel Activities Through the End of 2021

Mountain Region

n=400

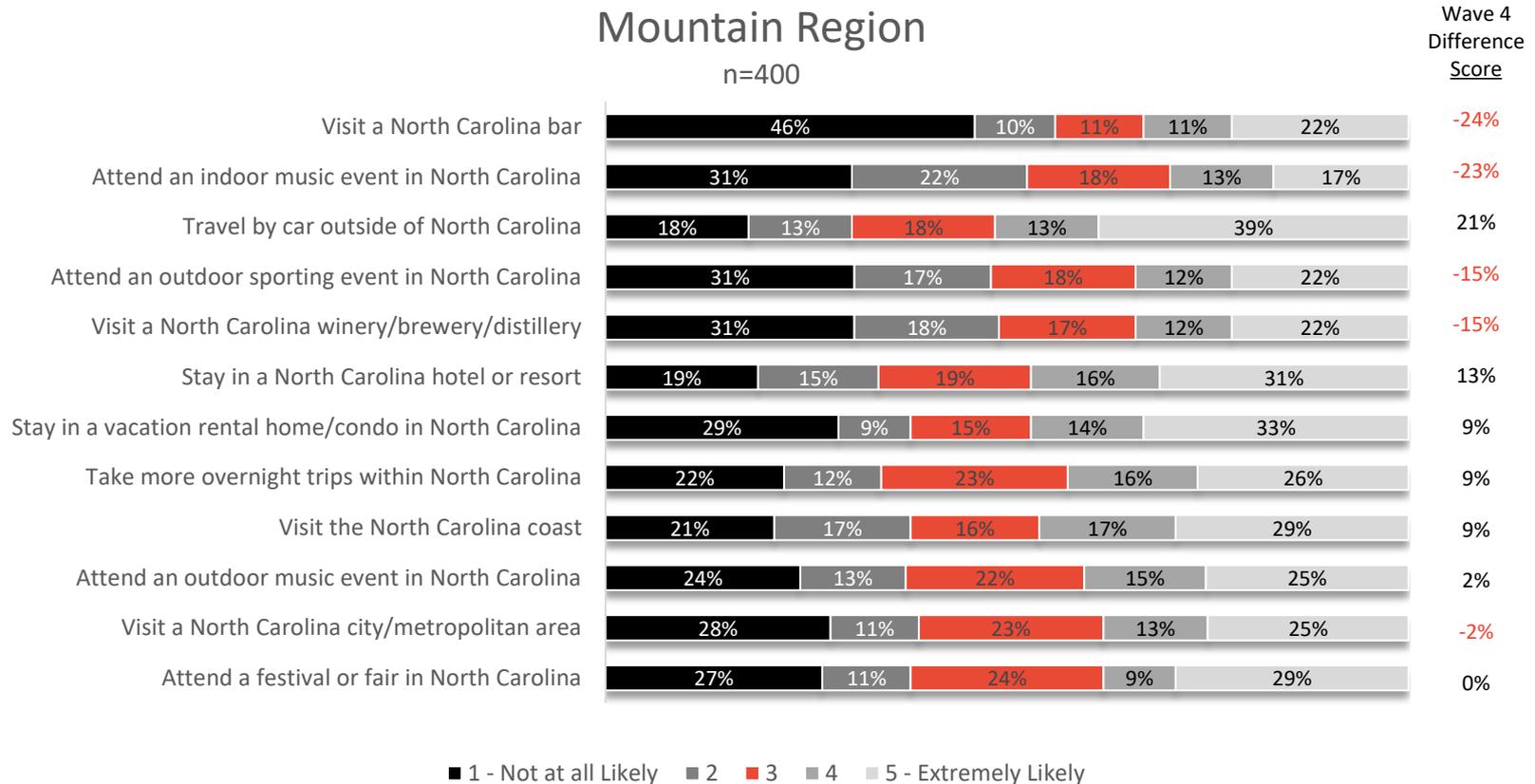


Q5: Using a scale of 1 (not at all likely) to 5 (extremely likely), please indicate how likely you are to engage in each of the following activities through the end of 2021 given the current status of the pandemic. (Question revised W4)

Travel Activities Through the End of 2021

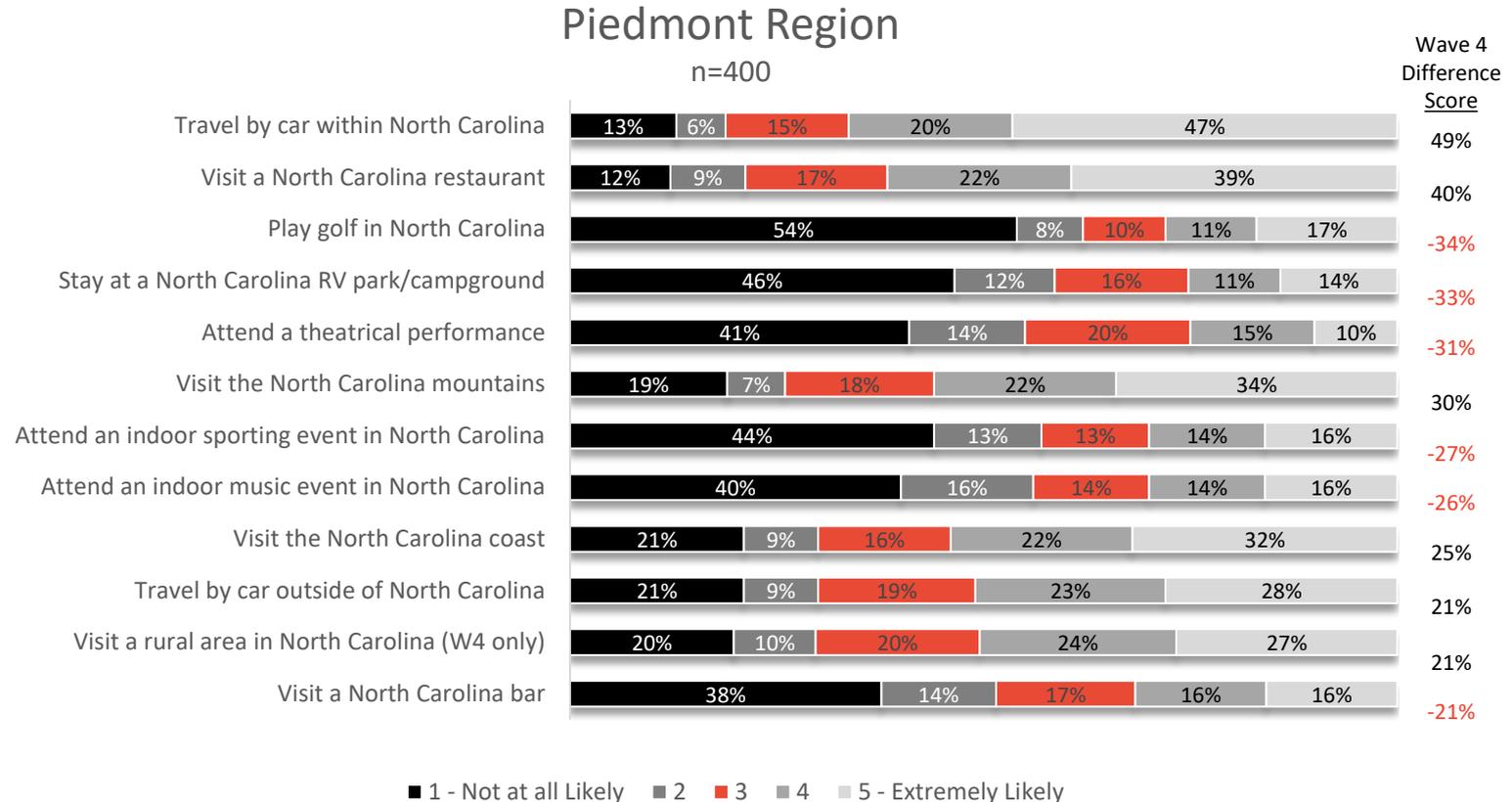
Mountain Region

n=400



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 through the end of 2021 given the current status of the pandemic. (Question revised W4)

Travel Activities Through the End of 2021

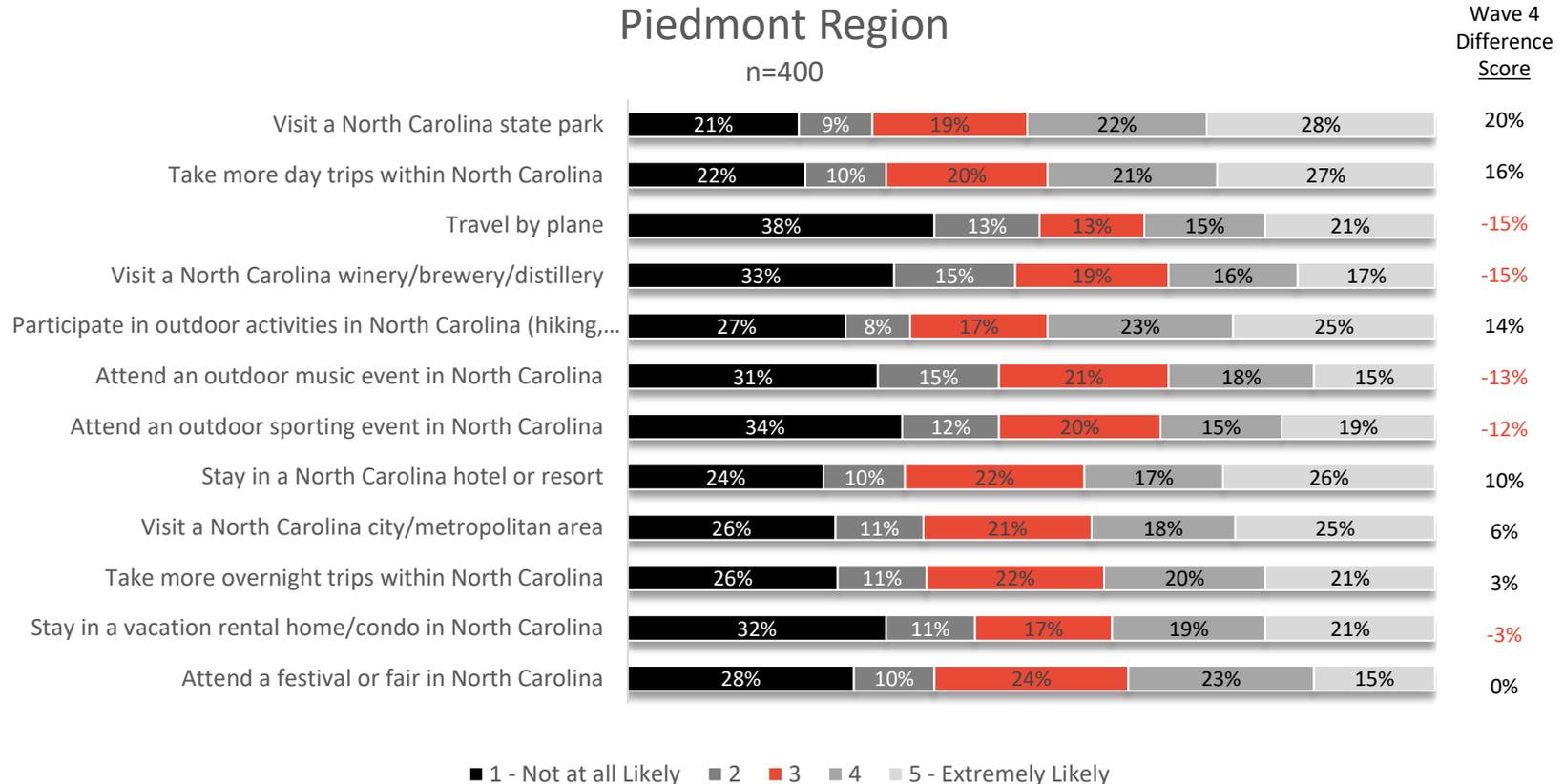


Q5: Using a scale of 1 (not at all likely) to 5 (extremely likely), please indicate how likely you are to engage in each of the following activities through the end of 2021 given the current status of the pandemic. (Question revised W4)

Travel Activities Through the End of 2021

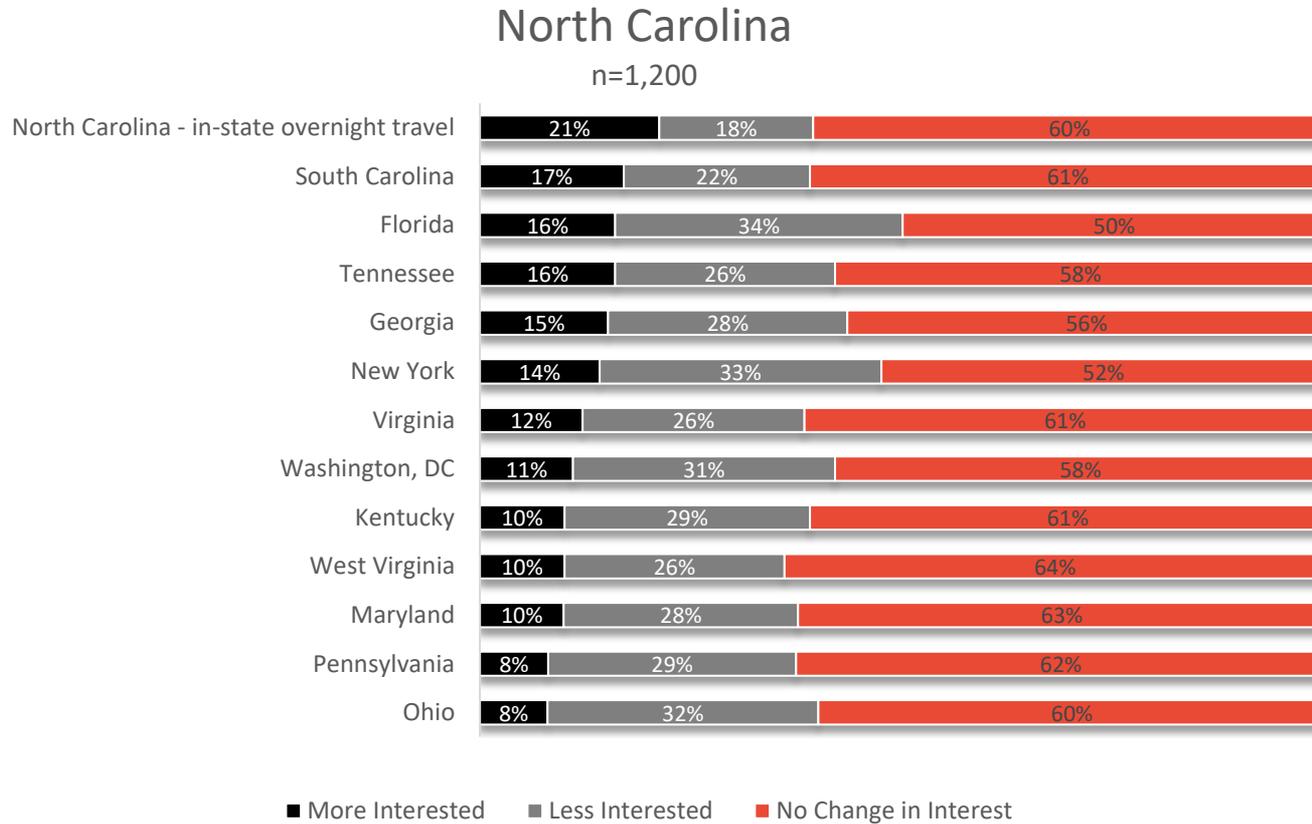
Piedmont Region

n=400



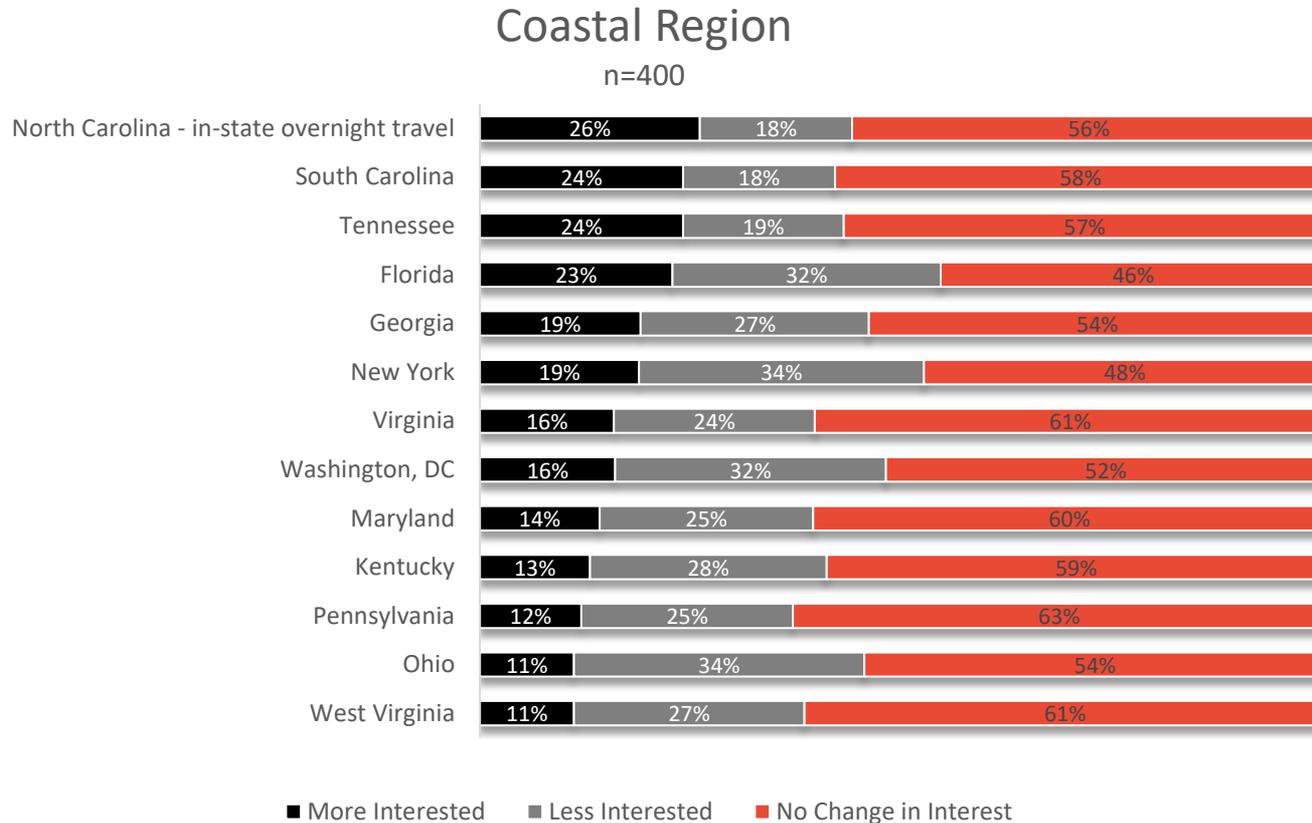
Q5 Using a scale of 1 (not at all likely) to 5 (extremely likely), please indicate how likely you are to engage in each of the following activities through the end of 2021 given the current status of the pandemic. (Question revised W4)

Overall, North Carolina Resident Interest in Visiting Other States has Not Changed as a Result of COVID-19



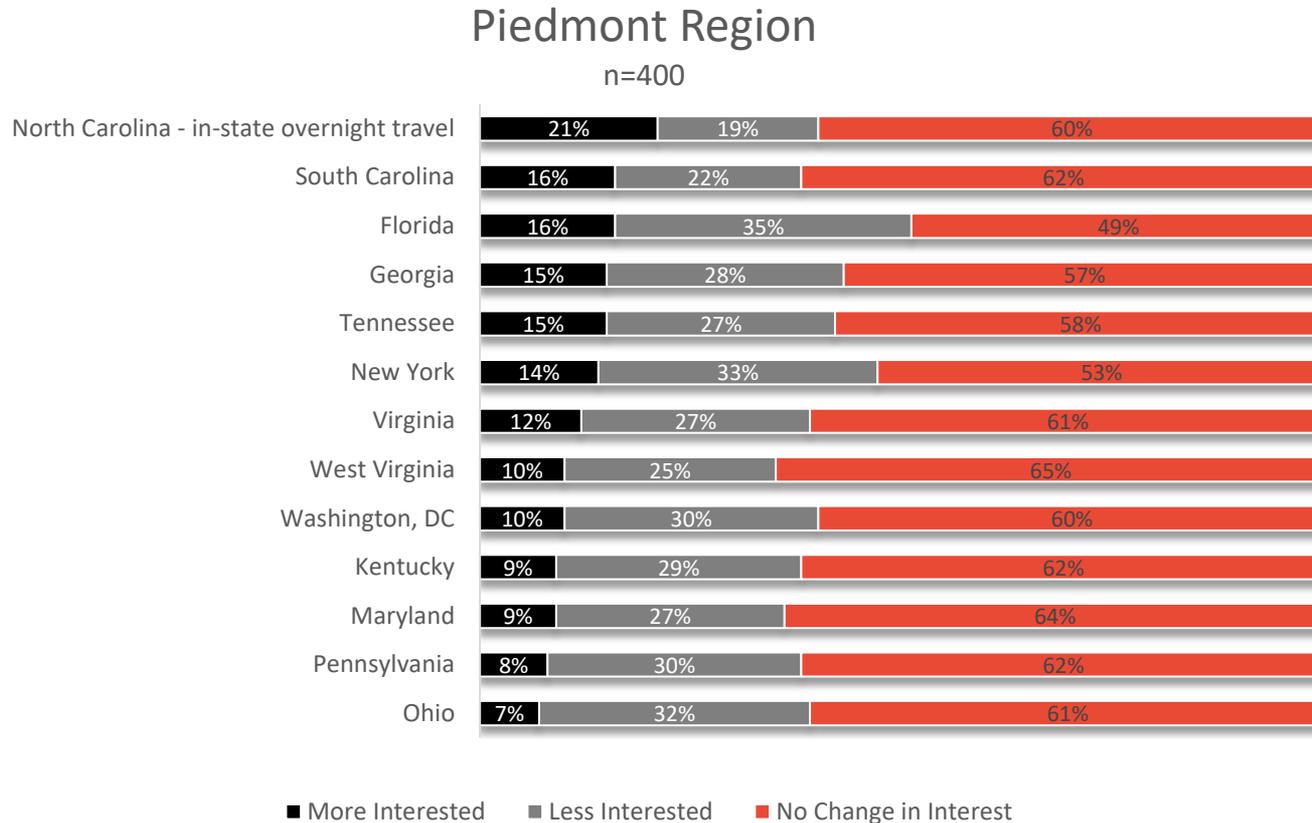
Q5b: Has COVID-19 changed your interest in visiting each of the following states? (Question added W2)

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

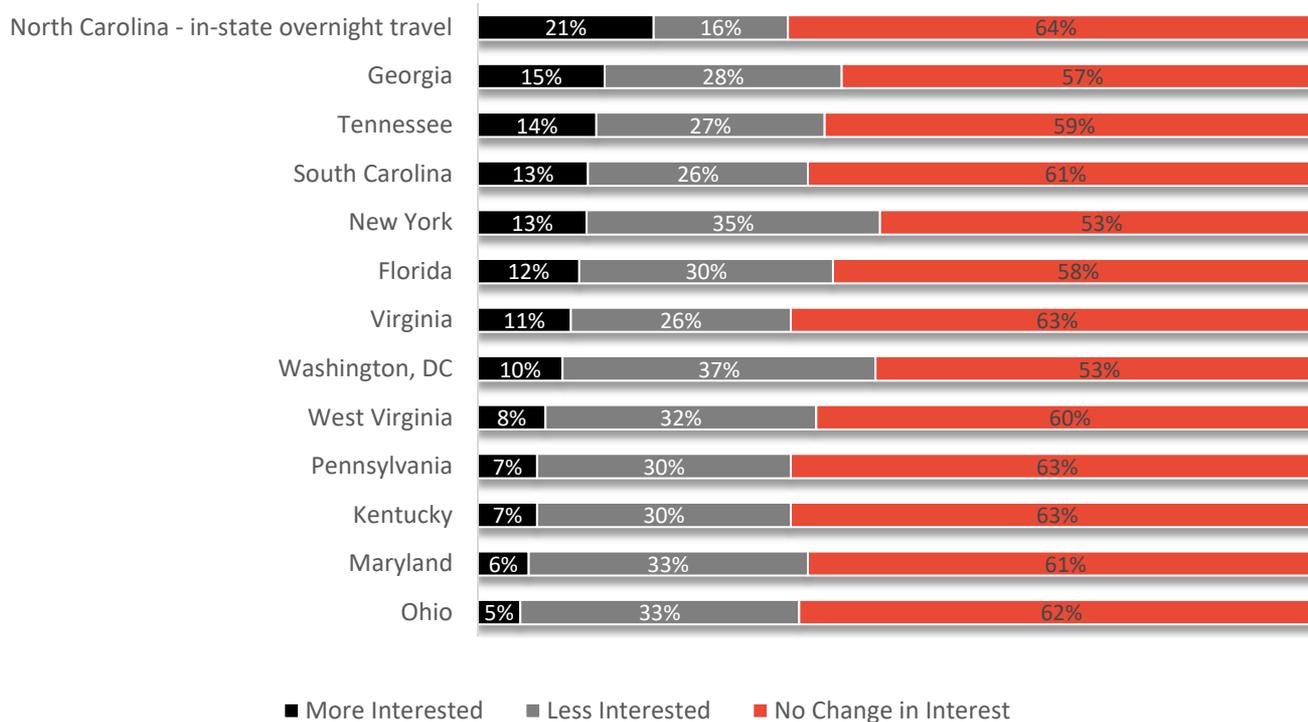


Q5b: Has COVID-19 changed your interest in visiting each of the following states? (Question added W2)

Impact of COVID-19 on Interest in Visiting Other States

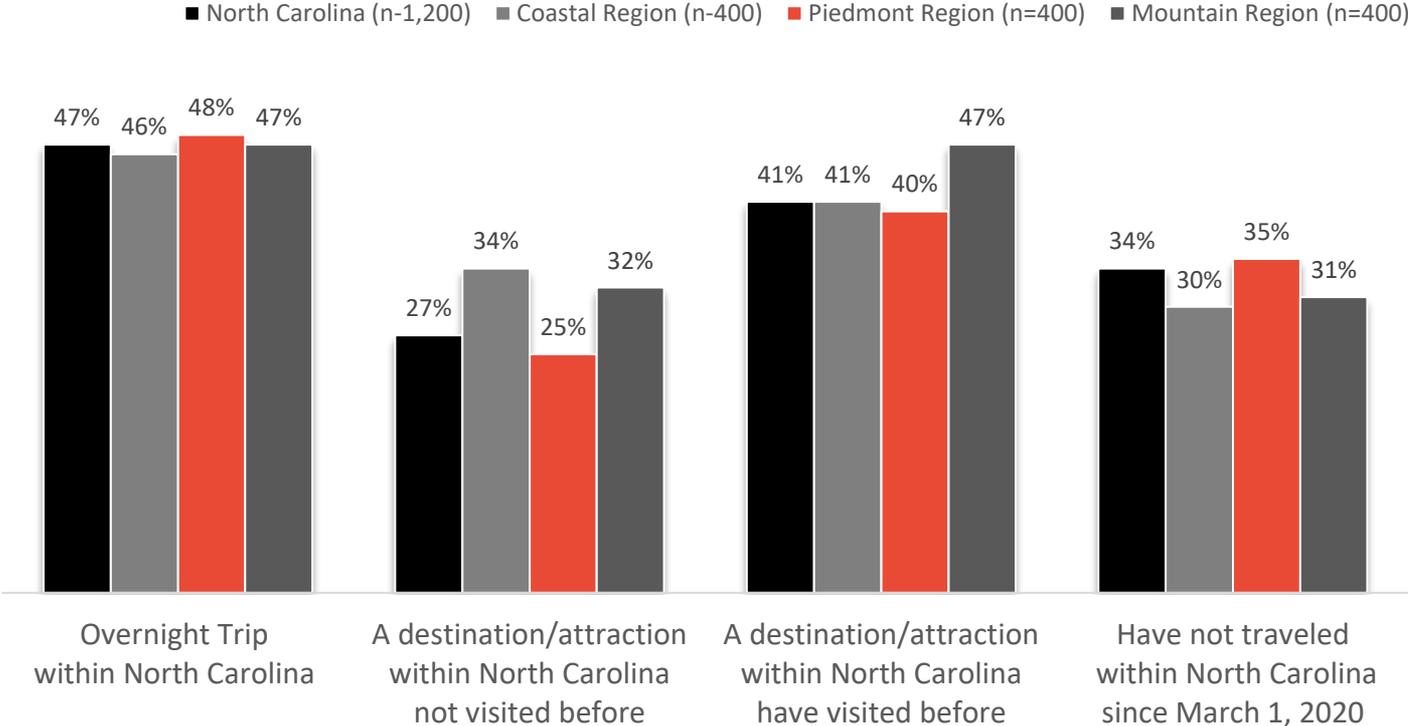
Mountain Region

n=400



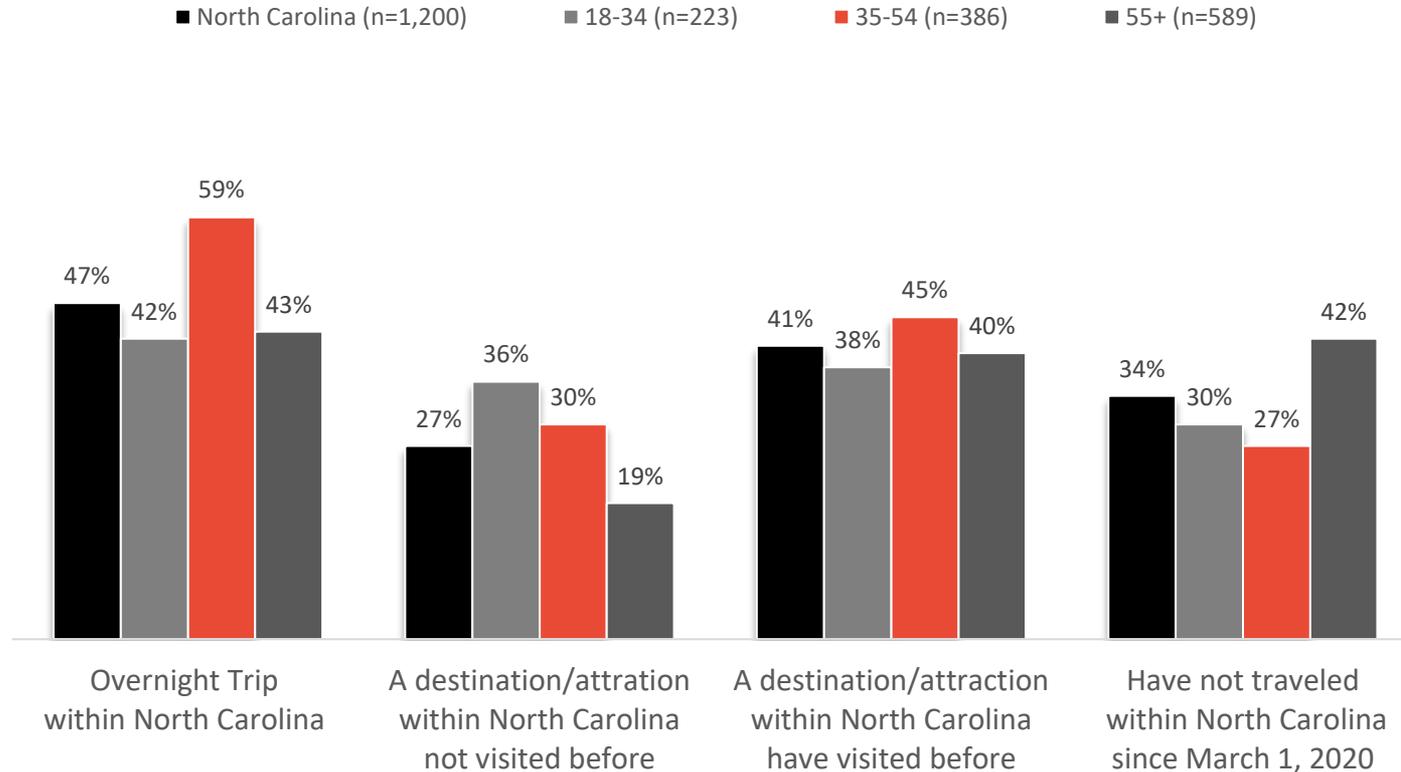
Q5b: Has COVID-19 changed your interest in visiting each of the following states? (Question added W2)

Since March 2020, Almost Half of North Carolina Residents Have Taken an Overnight Trip Within the State and Most of Those to Familiar Destinations



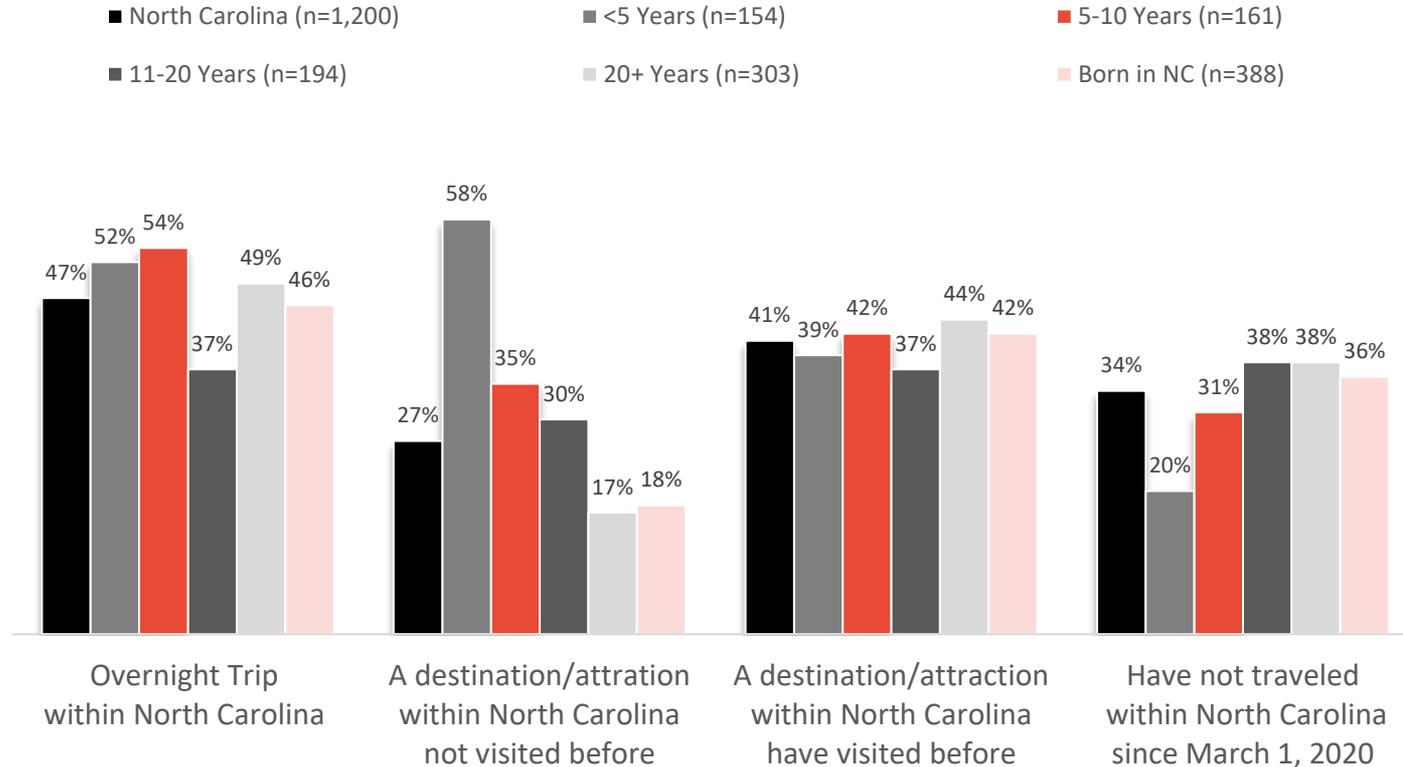
Q6a: Since March 1, 2020, have you taken any of the following types of trips? (Question added W2)

Residents Aged 35-54 Most Likely to Have Traveled Within North Carolina Since March 1, 2020



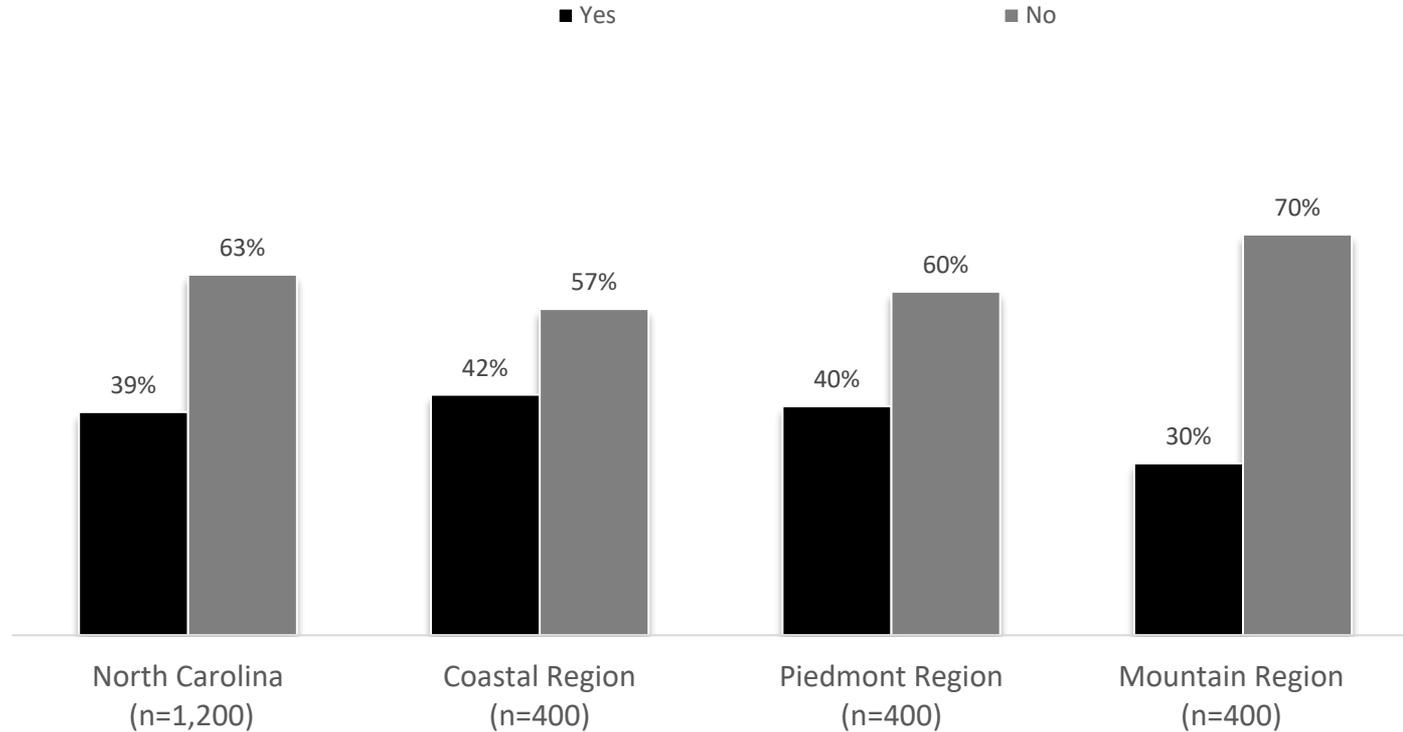
Q6a: Since March 1, 2020, have you taken any of the following types of trips? (Question added W2)

Residents Who Have Lived in the State 10 or Fewer Years Most Likely to Have Traveled Within North Carolina Since March 1, 2020



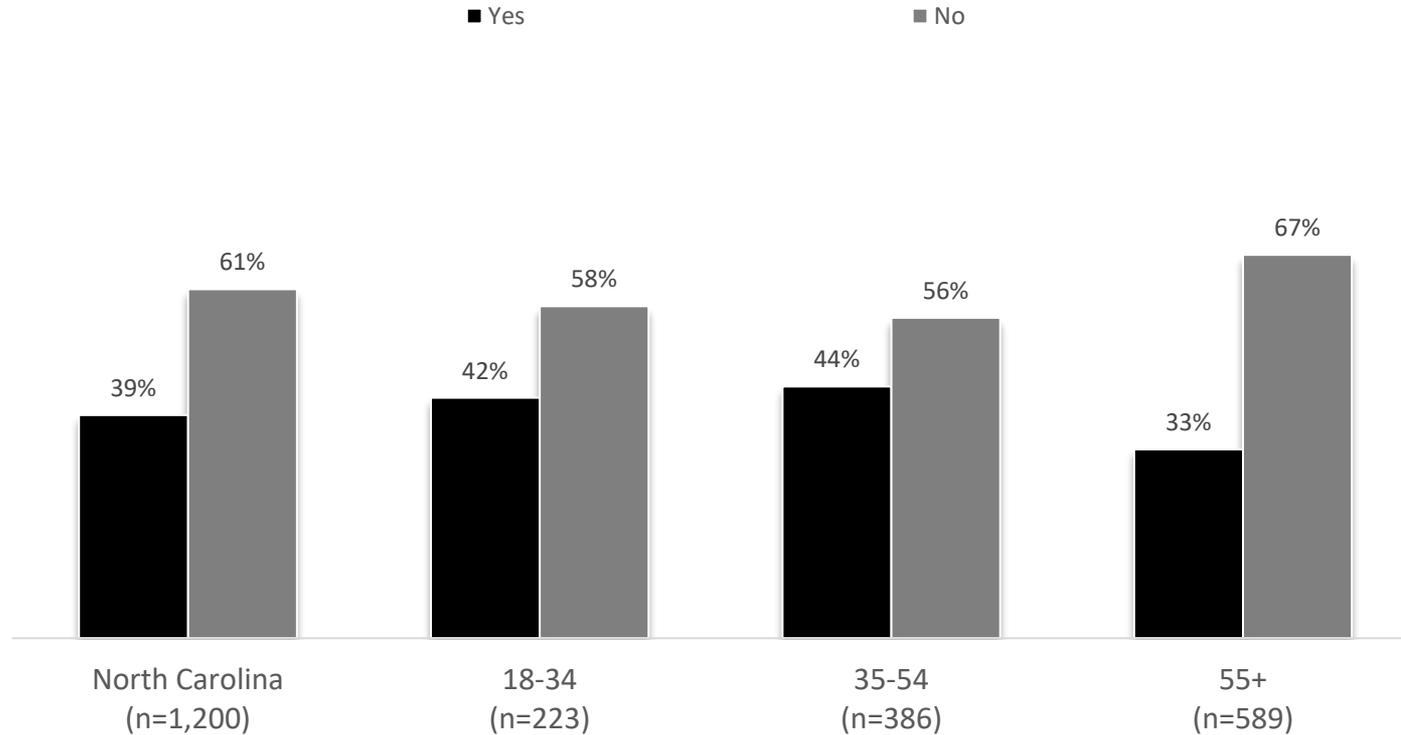
Q6a: Since March 1, 2020, have you taken any of the following types of trips? (Question added W2)

Four in Ten Residents Have An Overnight Trip Within North Carolina Planned by December 31, 2021 – Double That of Wave 3



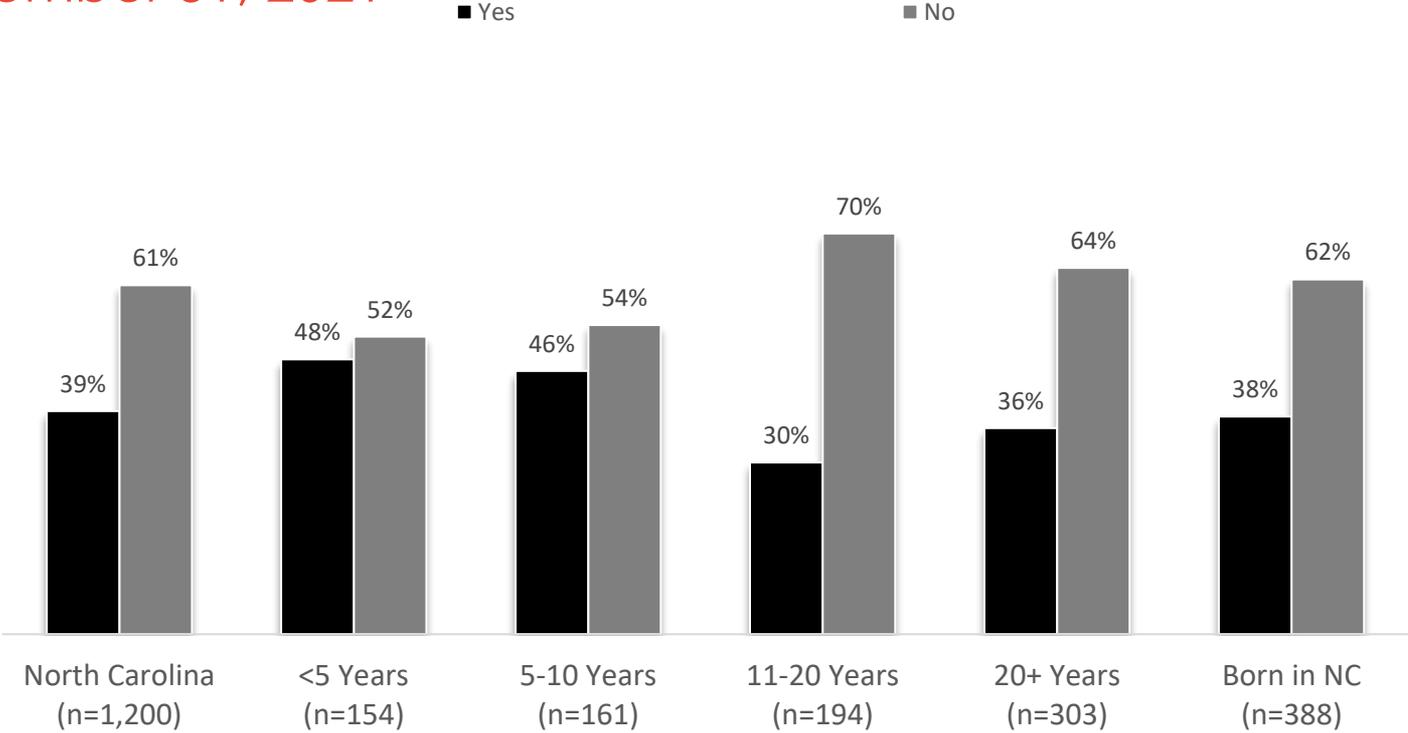
Q7a: Do you currently have an overnight trip within North Carolina planned between now and December 31, 2021? (Question added W2)

Older Residents Least Likely to Travel Within North Carolina by December 31, 2021



Q7a: Do you currently have an overnight trip within North Carolina planned between now and December 31, 2021? (Question added W2)

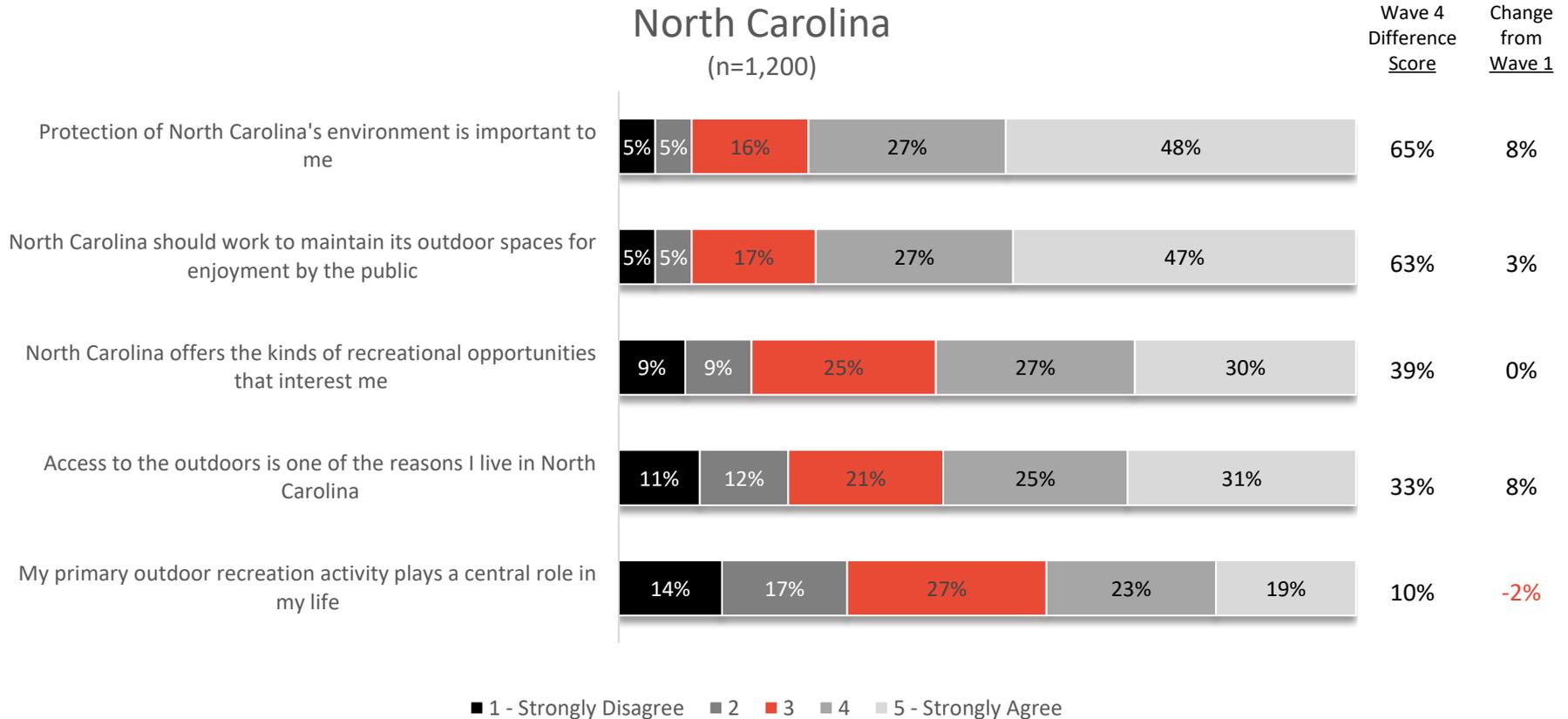
Those Who Have Lived in North Carolina 10 Years or Less Most Likely to Have Plans for an Overnight Trip Within North Carolina by December 31, 2021



Q7a: Do you currently have an overnight trip within North Carolina planned between now and December 31, 2021? (Question added W2)

Outdoor

The North Carolina Environment is Important to Residents who Feel the State Should Work to Maintain Its Outdoor Spaces



QW1-8: Using a scale of 1 (strongly disagree) to 5 (strongly agree), please indicate your level of agreement with each of the following statements. (Question included in W1 and W4)

Residents Aged 35 and Older Have Stronger Opinions Regarding Protecting the Environment Than Younger Residents

North Carolina

Difference Scores (%)

	18-34 n=223	35-54 n=386	55+ n=589
Protection of North Carolina's environment is important to me	45	78	70
North Carolina should work to maintain its outdoor spaces for enjoyment by the public	50	69	69
North Carolina offers the kinds of recreational opportunities that interest me	14	60	42
Access to the outdoors is one of the reasons I live in North Carolina	40	29	30
My primary outdoor recreation activity plays a central role in my life	13	30	-7

QW1-8: Using a scale of 1 (strongly disagree) to 5 (strongly agree), please indicate your level of agreement with each of the following statements. (Question included in W1 and W4)

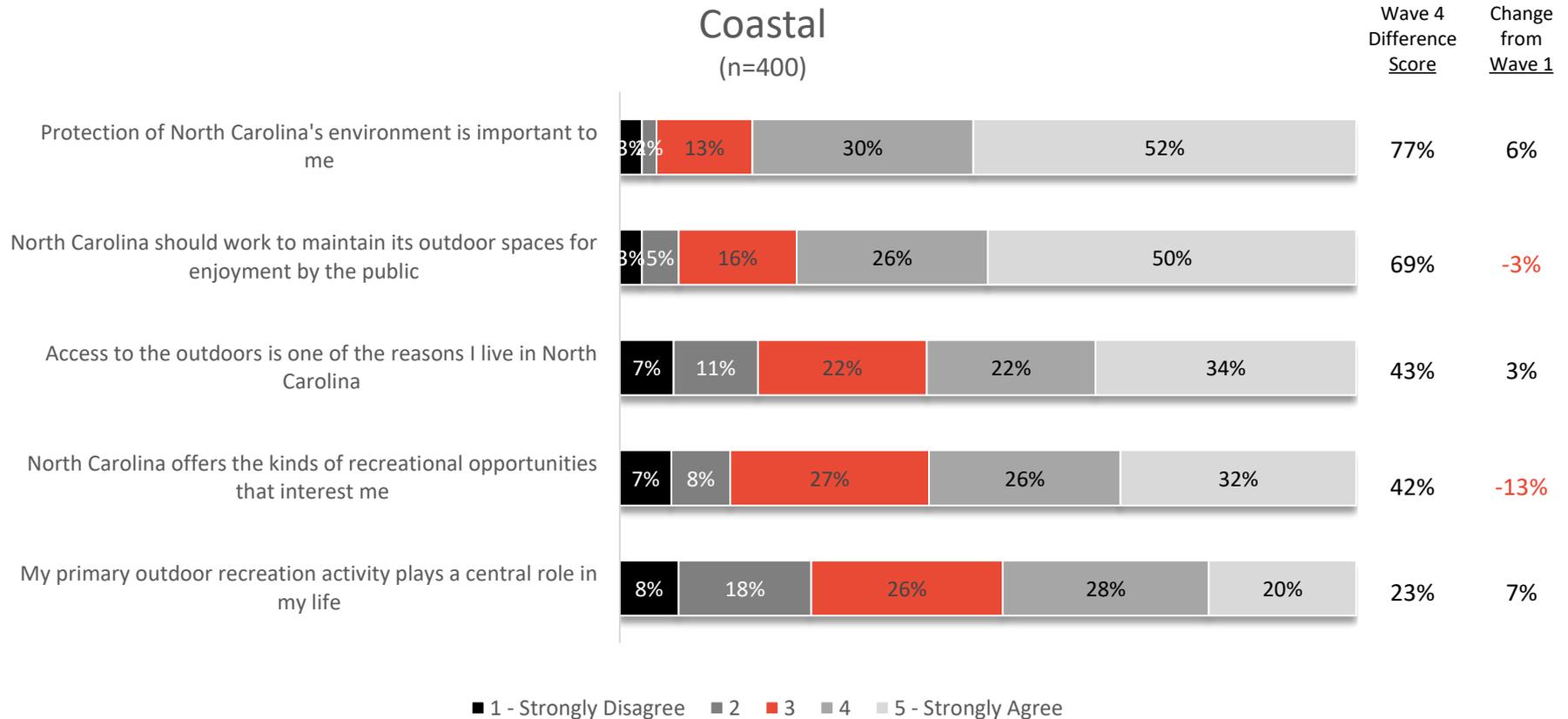
Those Who Have Lived in North Carolina 5-10 Years Feel Strongest About Protecting North Carolina's Environment

North Carolina Difference Scores (%)

	<5 Years n=154	5-10 Years n=161	11-20 Years n=194	20+ Years n=303	Born in NC n=388
Protection of North Carolina's environment is important to me	56	86	58	65	63
North Carolina should work to maintain its outdoor spaces for enjoyment by the public	65	81	62	59	59
North Carolina offers the kinds of recreational opportunities that interest me	38	63	27	45	30
Access to the outdoors is one of the reasons I live in North Carolina	50	45	22	20	33
My primary outdoor recreation activity plays a central role in my life	8	37	-7	7	8

QW1-8: Using a scale of 1 (strongly disagree) to 5 (strongly agree), please indicate your level of agreement with each of the following statements. (Question included in W1 and W4)

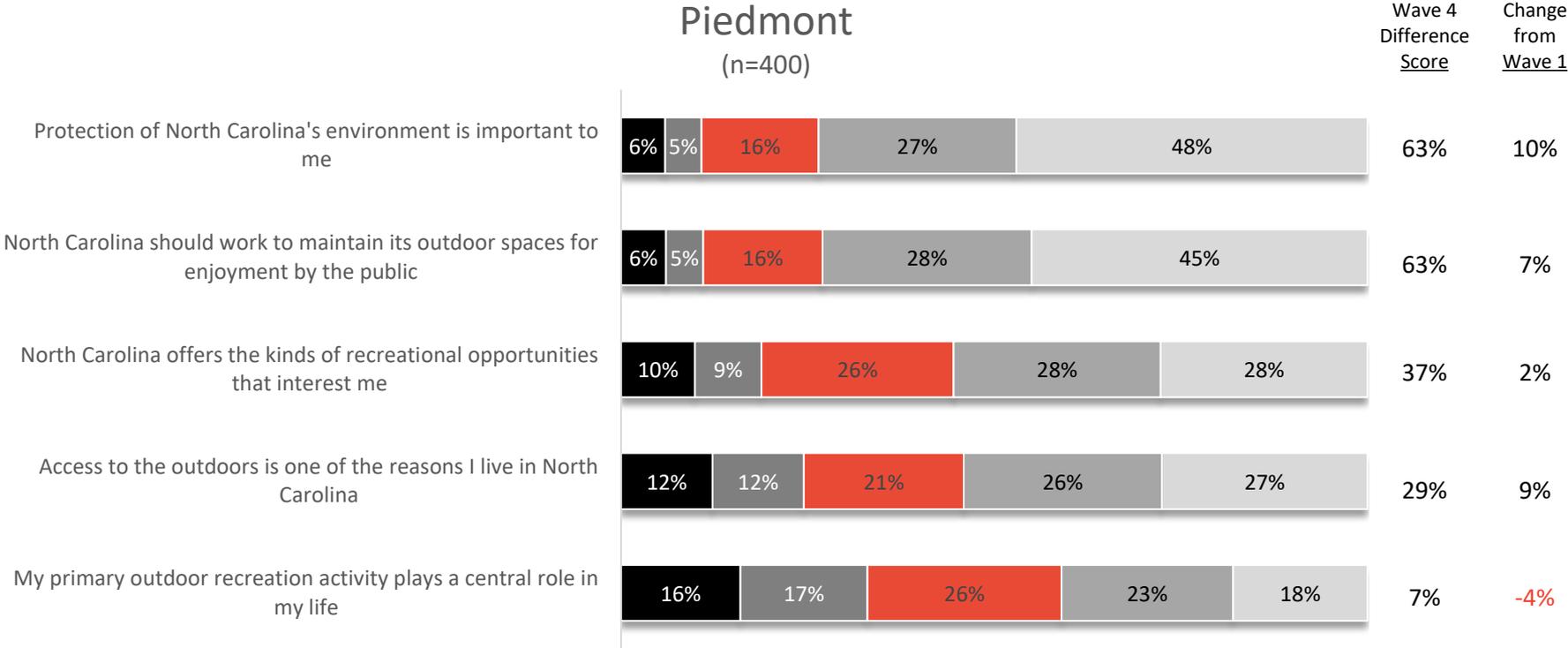
The North Carolina Outdoors



QW1-8: Using a scale of 1 (strongly disagree) to 5 (strongly agree), please indicate your level of agreement with each of the following statements. (Question included in W1 and W4)

The North Carolina Outdoors

Piedmont (n=400)

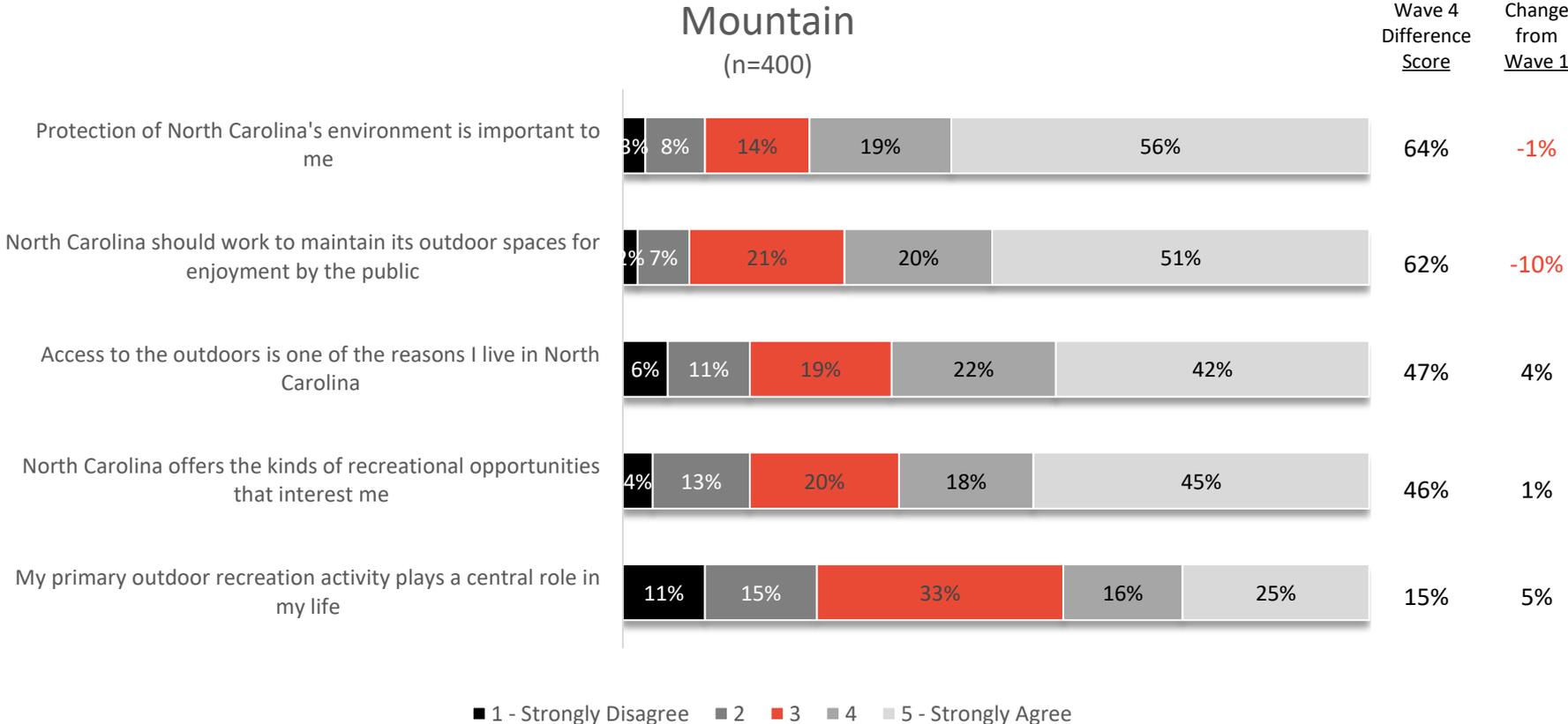


■ 1 - Strongly Disagree ■ 2 ■ 3 ■ 4 ■ 5 - Strongly Agree

QW1-8: Using a scale of 1 (strongly disagree) to 5 (strongly agree), please indicate your level of agreement with each of the following statements. (Question included in W1 and W4)

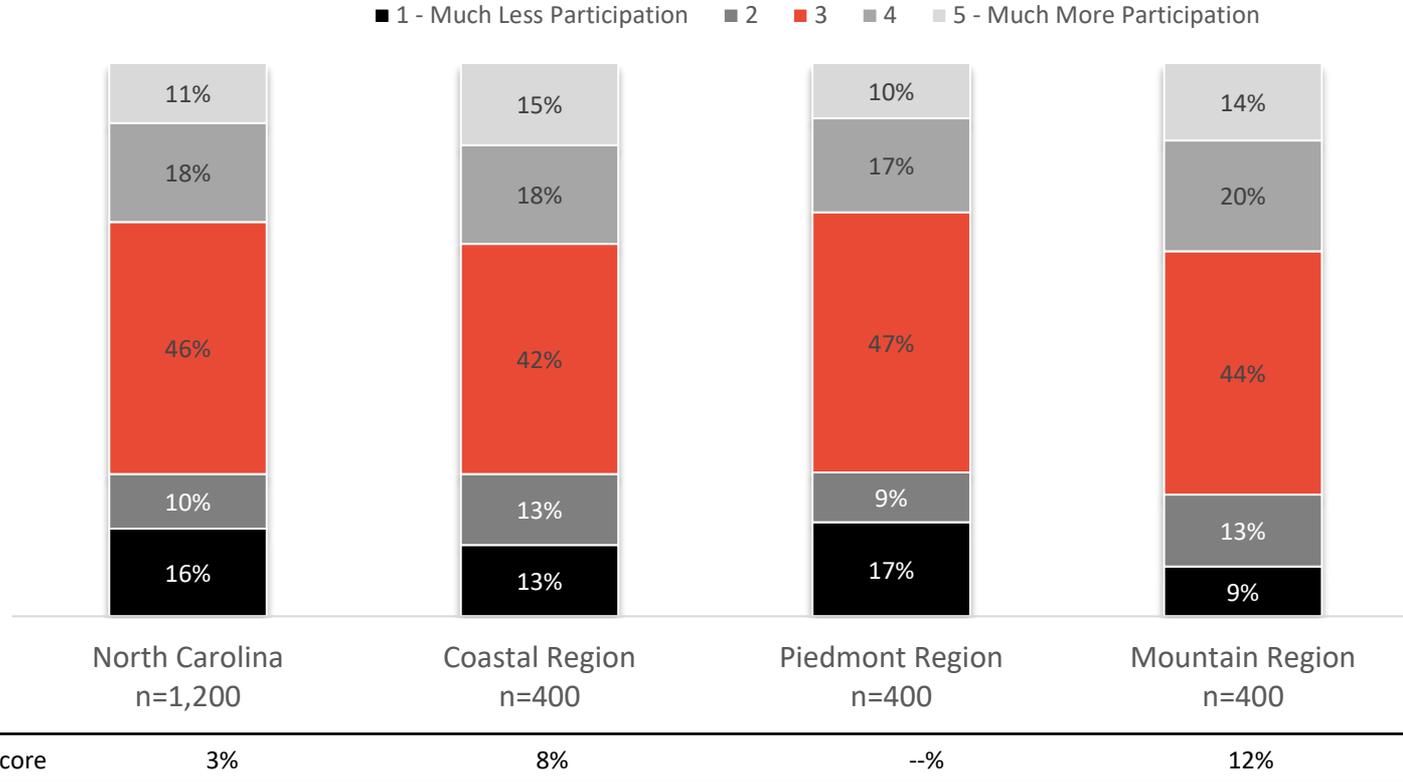
The North Carolina Outdoors

Mountain (n=400)



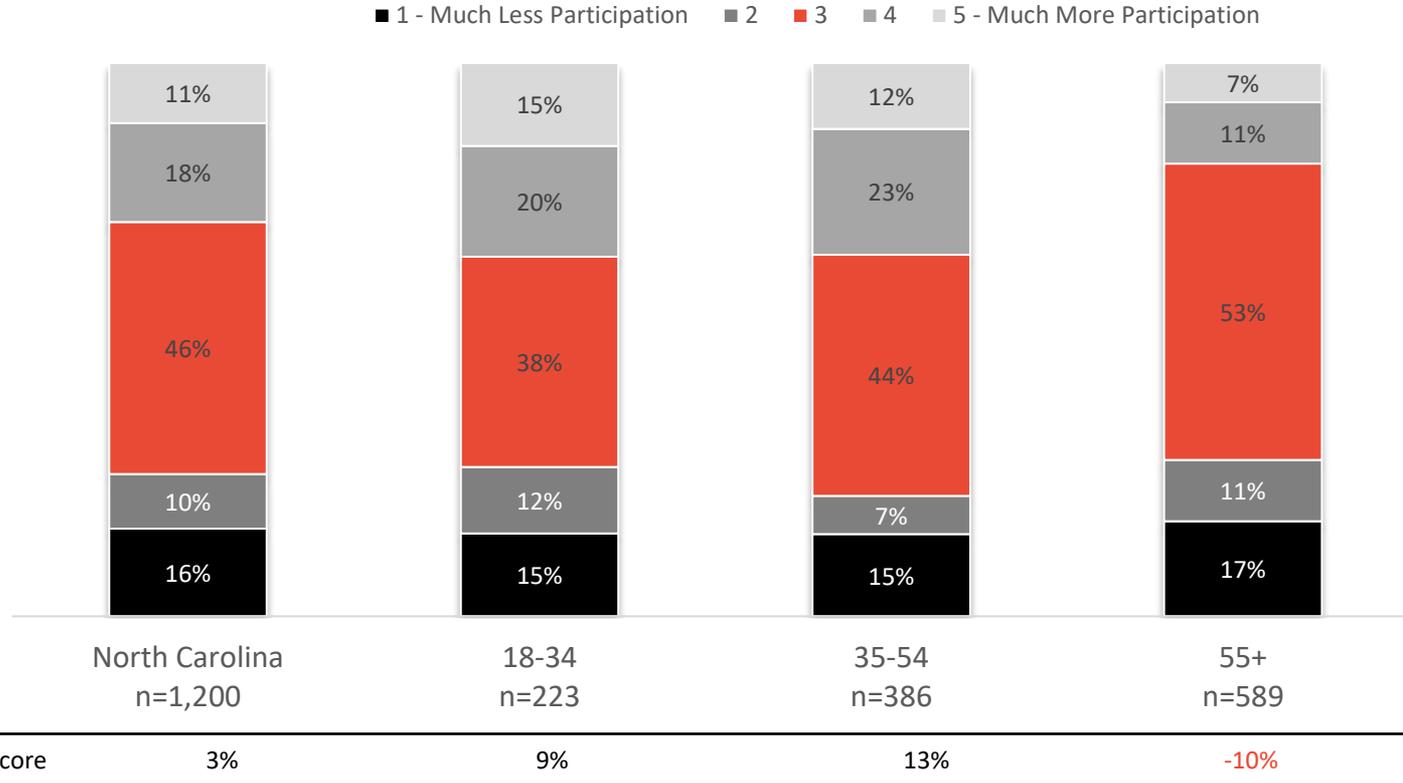
QW1-8: Using a scale of 1 (strongly disagree) to 5 (strongly agree), please indicate your level of agreement with each of the following statements. (Question included in W1 and W4)

Outdoor Activity Participation Levels Increased Only Slightly as a Result of the Pandemic



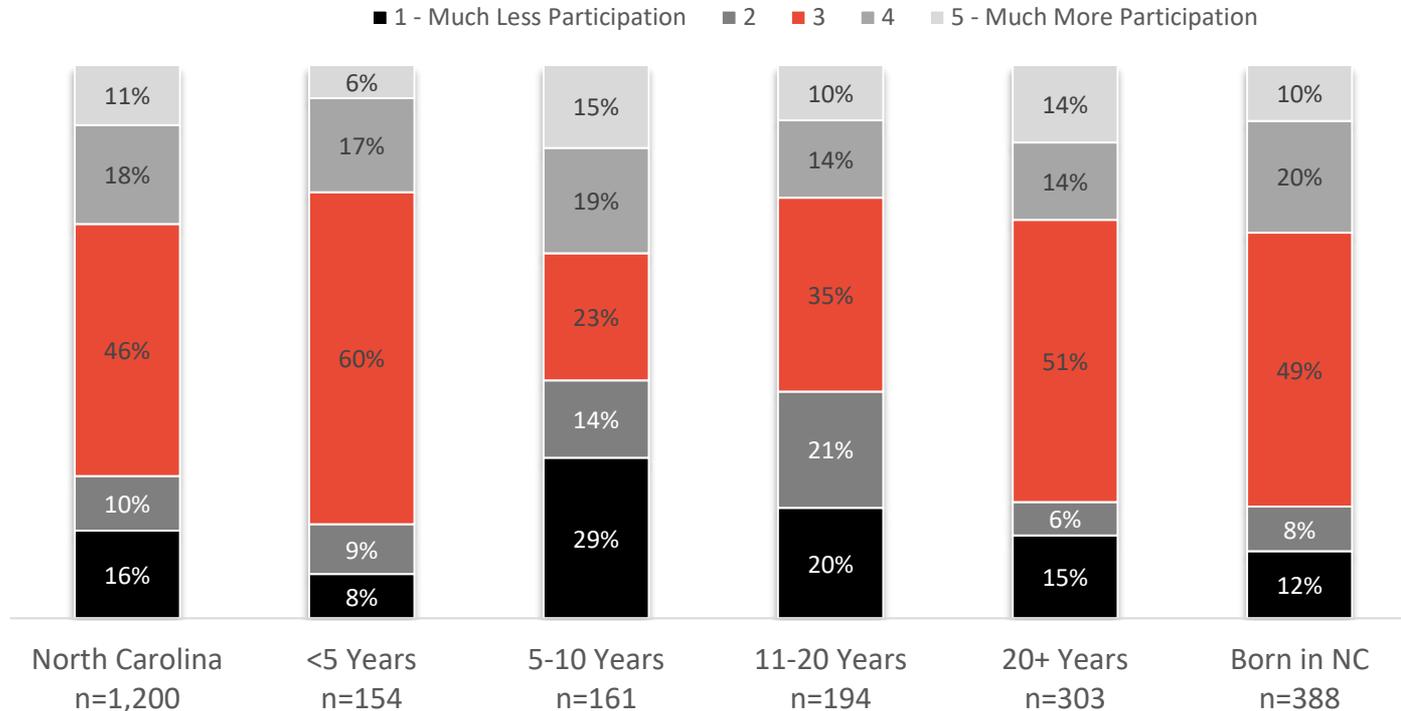
Q17: Using a scale of 1 (much less participation) to 5 (much more participation), please indicate how your level of participation in outdoor activities has changed because of the pandemic. (Question added W4)

Outdoor Activity Participation Declined Among Older Residents as a Result of the Pandemic



Q17: Using a scale of 1 (much less participation) to 5 (much more participation), please indicate how your level of participation in outdoor activities has changed because of the pandemic. (Question added W4)

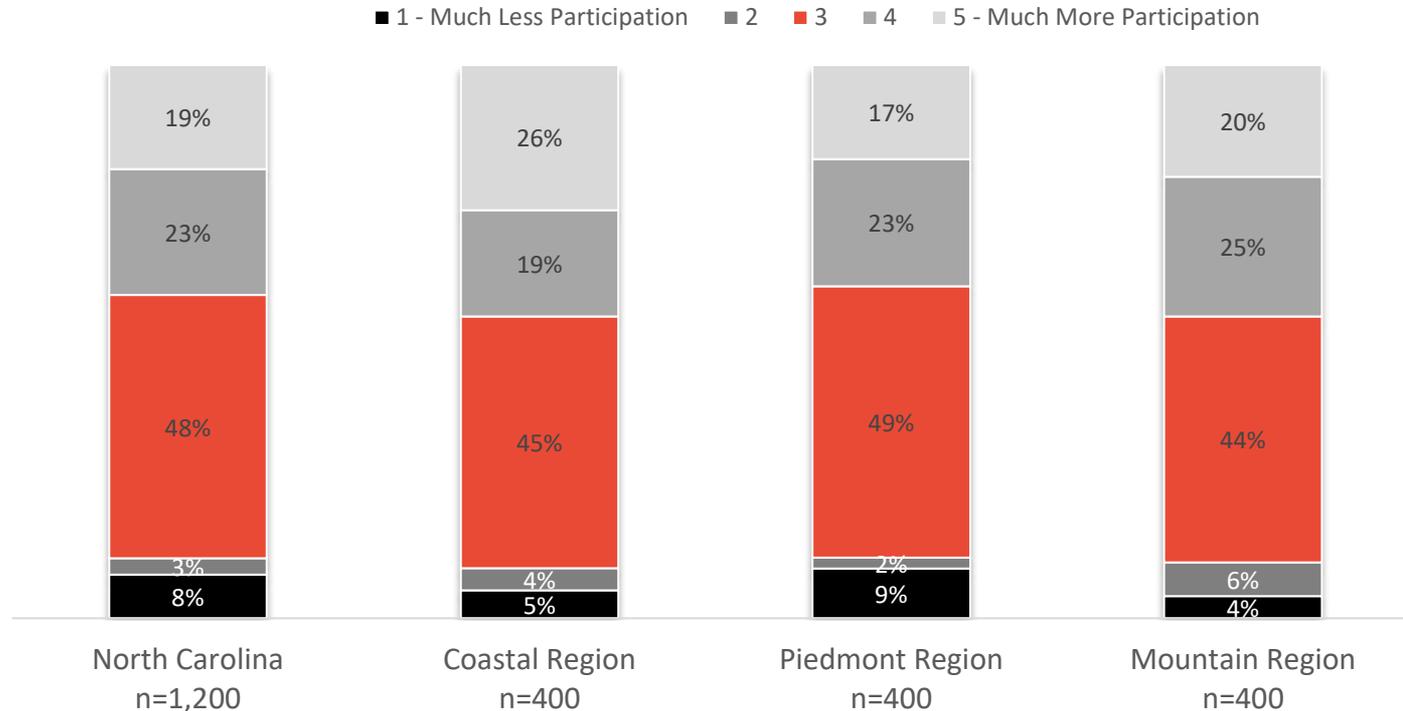
Outdoor Activity Participation Levels Increased Among Those Living in the State Less than 5 Years and More Than 20 Years



Difference Score	3%	7%	-9%	-17%	7%	9%
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Q17: Using a scale of 1 (much less participation) to 5 (much more participation), please indicate how your level of participation in outdoor activities has changed because of the pandemic. (Question added W4)

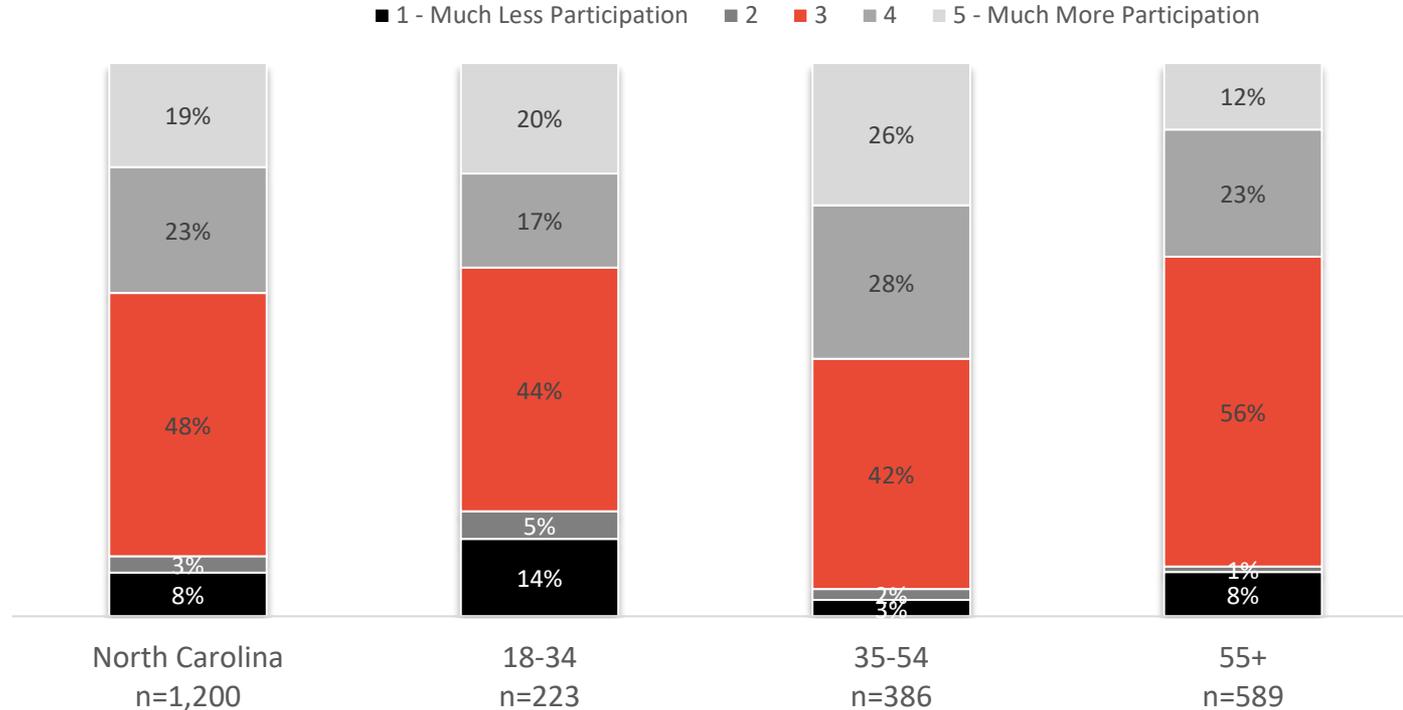
Outdoor Activity Participation Levels Expected to Increase Once the Pandemic is Over



Difference Score	31%	36%	29%	35%
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Q18: Using a scale of 1 (much less participation) to 5 (much more participation), please indicate how you expect your level of participation in outdoor activities to change once the pandemic is over. (Question added W4)

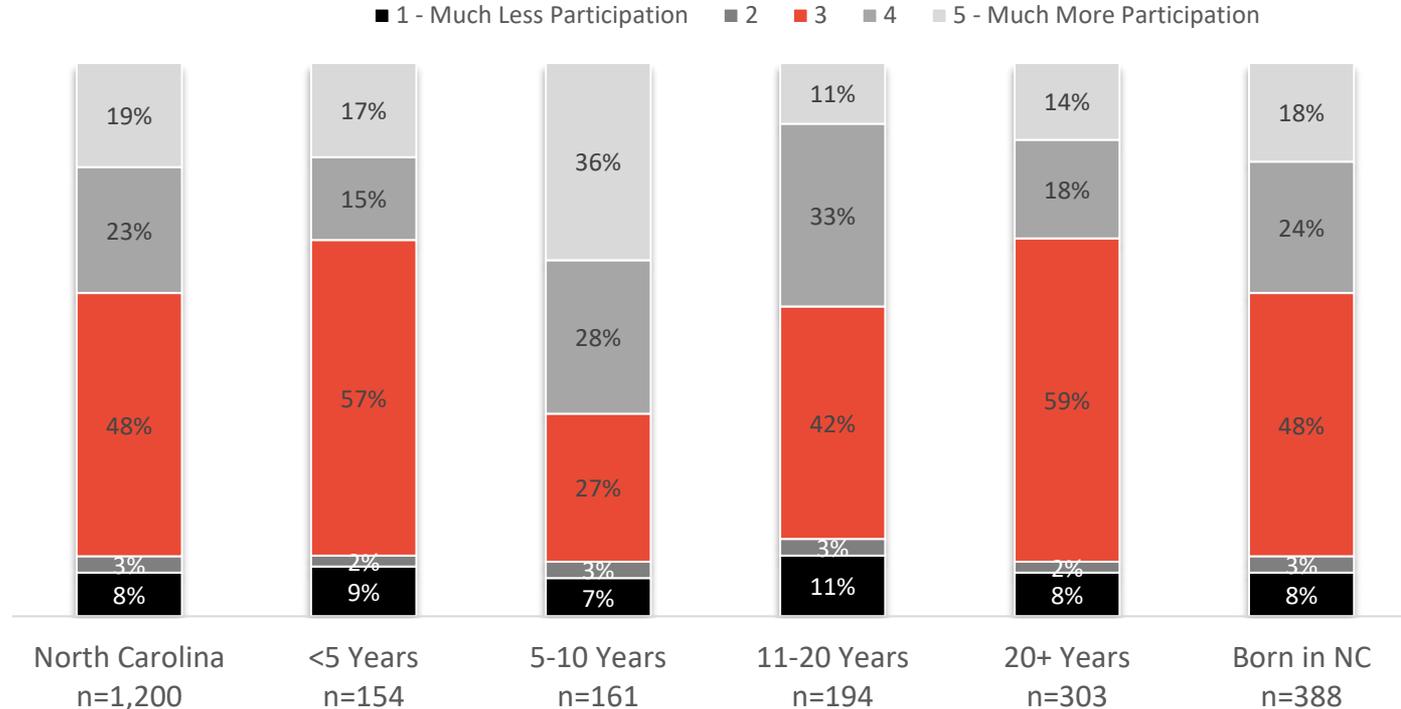
Outdoor Activity Participation After the Pandemic is Expected to Increase Most Among 35-54 Year Old Residents



Difference Score	31%	18%	49%	26%
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Q18: Using a scale of 1 (much less participation) to 5 (much more participation), please indicate how you expect your level of participation in outdoor activities to change once the pandemic is over. (Question added W4)

Outdoor Activity Participation Levels Expected to Increase Most Among Those Living in the State 5-10 Years

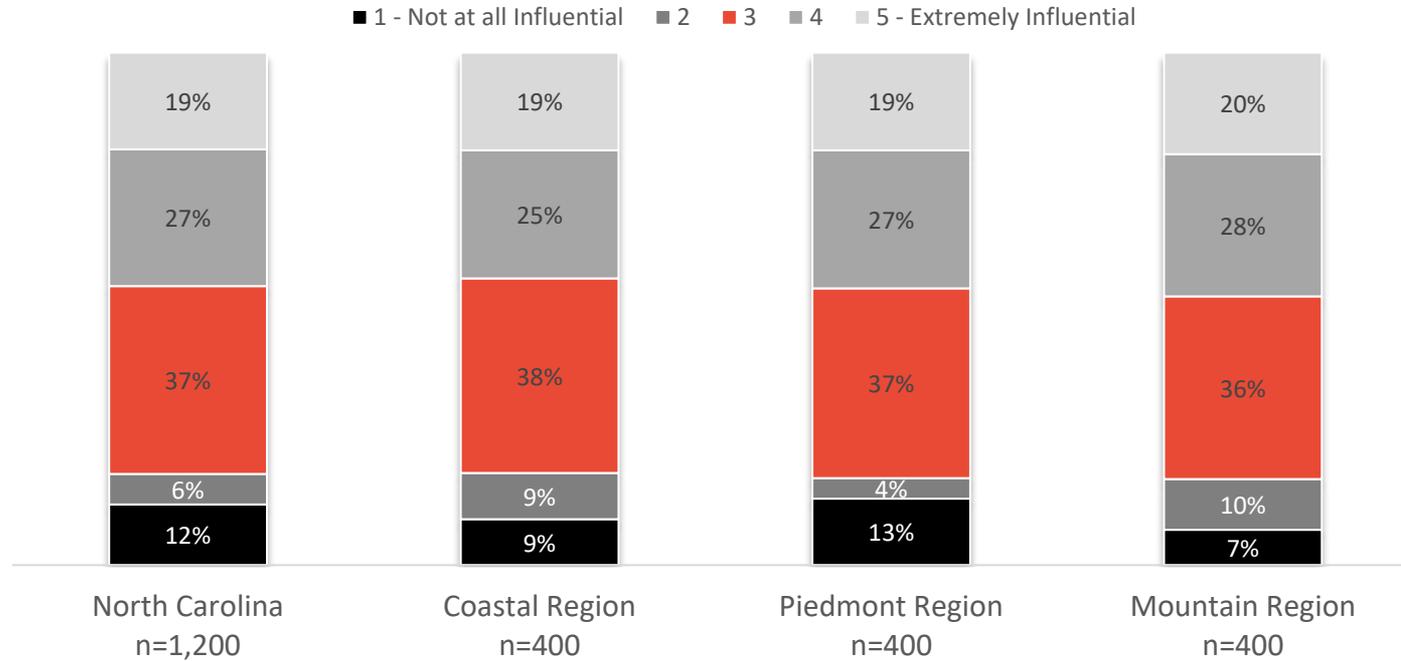


Difference Score	North Carolina	<5 Years	5-10 Years	11-20 Years	20+ Years	Born in NC
	31%	21%	54%	30%	21%	31%

Q18: Using a scale of 1 (much less participation) to 5 (much more participation), please indicate how you expect your level of participation in outdoor activities to change once the pandemic is over. (Question added W4)

Sustainability

Community Sustainability Efforts Influence Destination Choice of North Carolinians, but Less So Than in Wave 1

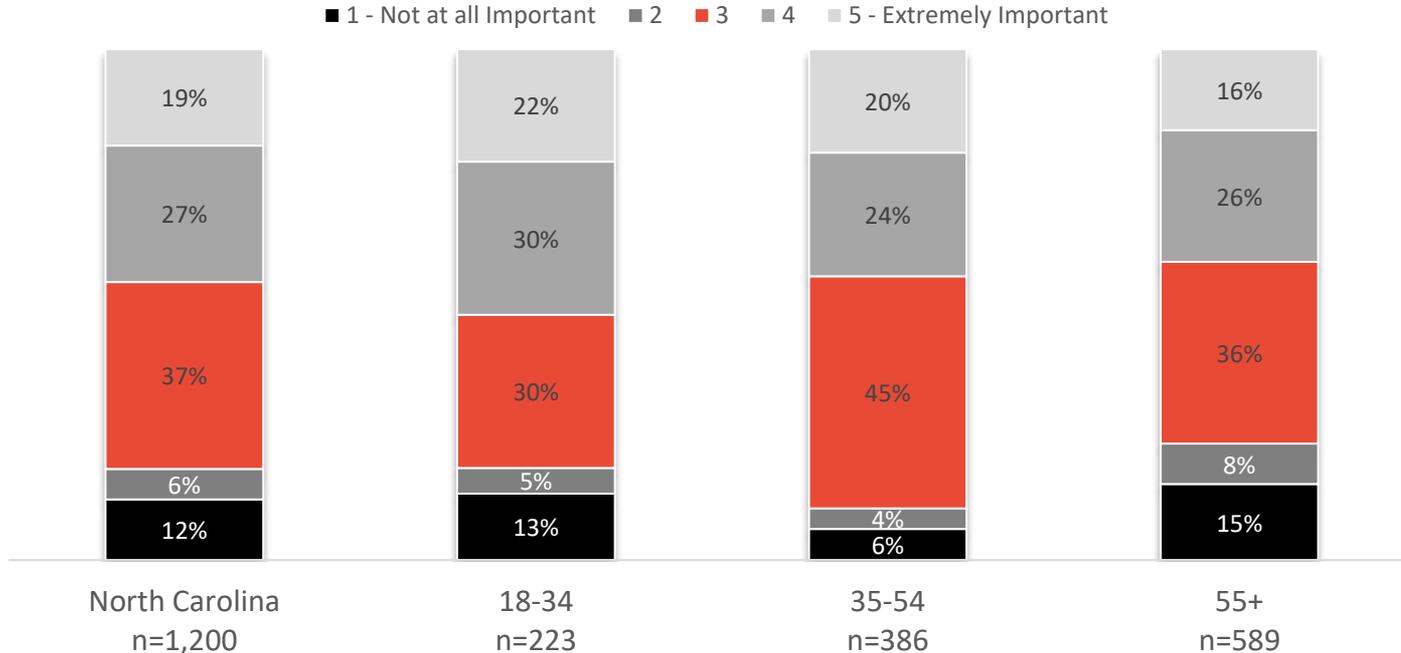


Difference Score	28%	36%	28%	32%
Change from W1	-13%	-3%	-12%	-16%

QW1-10: Using a scale of 1 (not at all influential) to 5 (extremely influential), please indicate how influential state or community efforts to ensure long term sustainability of the natural environment are on your decision in choosing a destination. (Question included in W1 and W4)

In Choosing a Destination, The Youngest North Carolina Residents are the Most Influenced by Community Sustainability Efforts

Resident Age



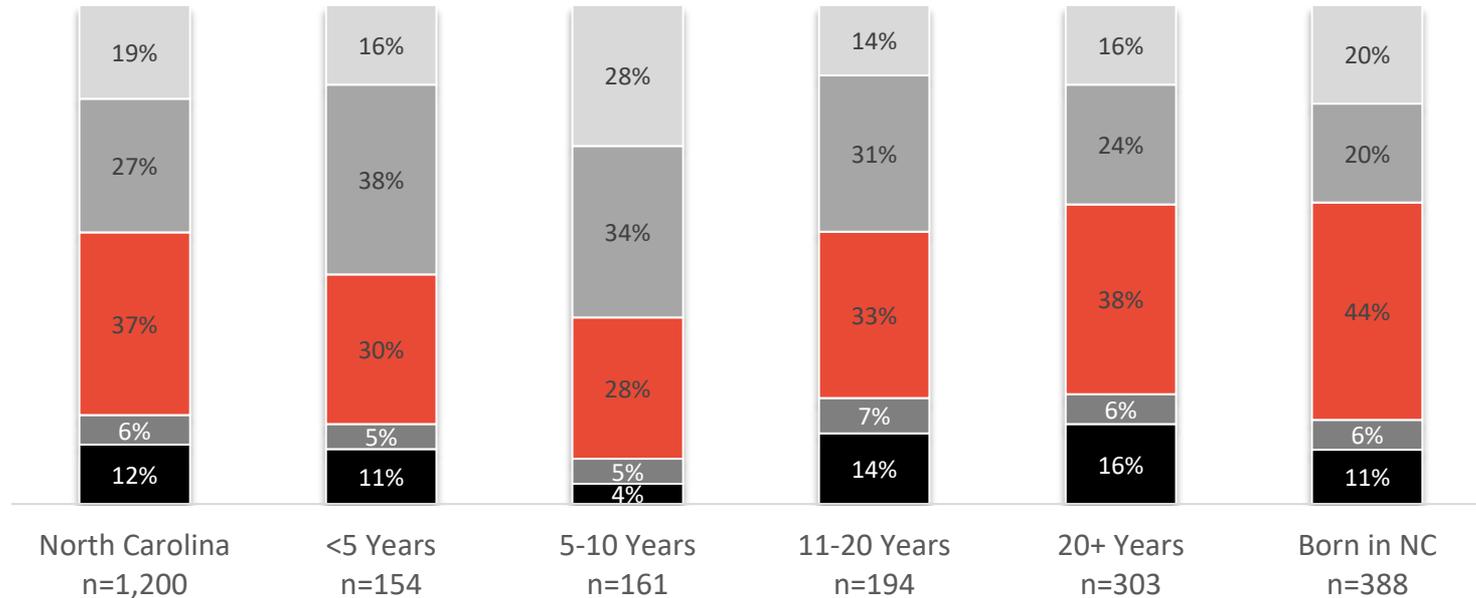
Difference Score	28%	34%	35%	19%
Change from W1	-13%	-14%	-4%	-19%

QW1-10 : Using a scale of 1 (not at all influential) to 5 (extremely influential), please indicate how influential state or community efforts to ensure long term sustainability of the natural environment are on your decision in choosing a destination. (Question included in W1 and W4)

When Choosing a Destination, Residents Living in the State 5-10 Years are the Most Influenced by Community Sustainability Efforts

Length of Residency

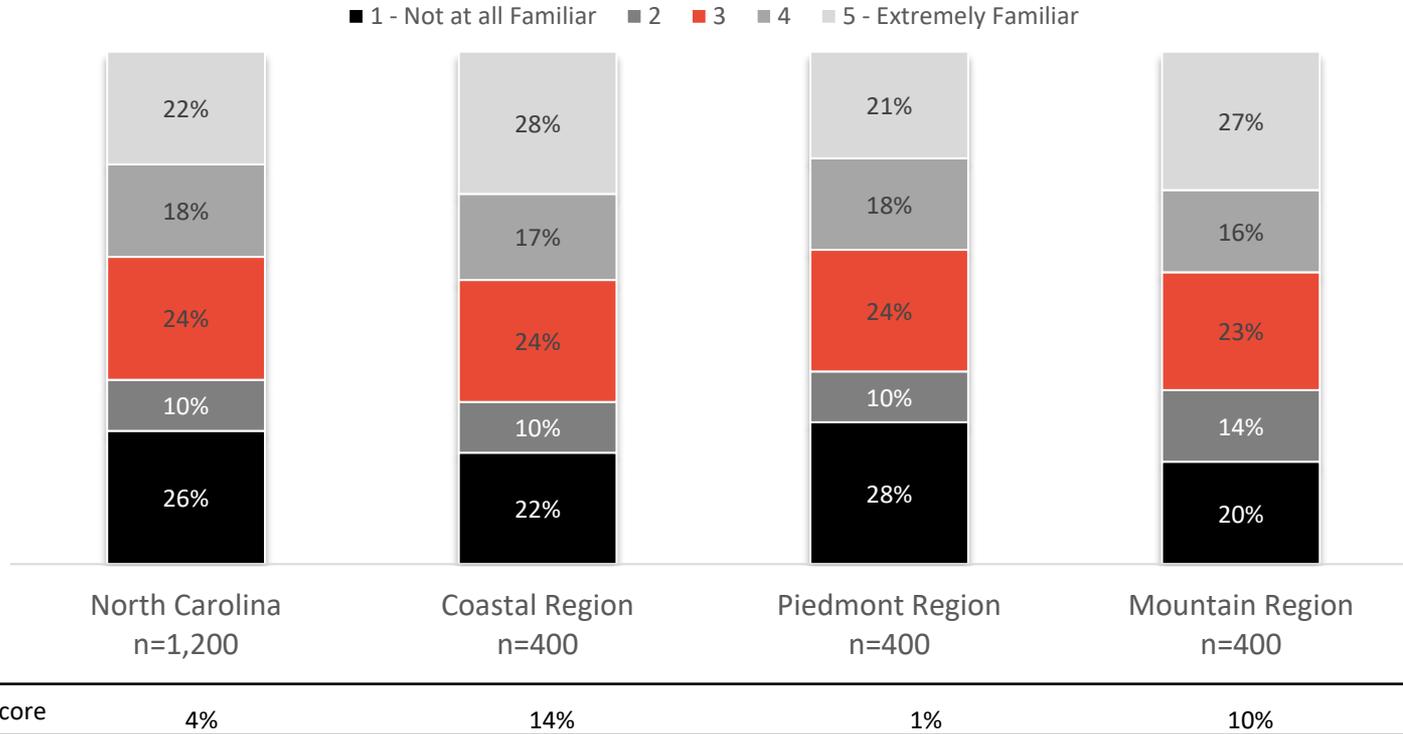
■ 1 - Not at all Important ■ 2 ■ 3 ■ 4 ■ 5 - Extremely Important



Difference Score	28%	39%	53%	24%	18%	23%
Change from W1	-13%	-19%	29%	-25%	-18%	-19%

QW1-10 : Using a scale of 1 (not at all influential) to 5 (extremely influential), please indicate how influential (Question included in W1 and W4) state or community efforts to ensure long term sustainability of the natural environment are on your decision in choosing a destination.

North Carolina Residents are More Familiar Than Not with the Concept of “Leave No Trace”

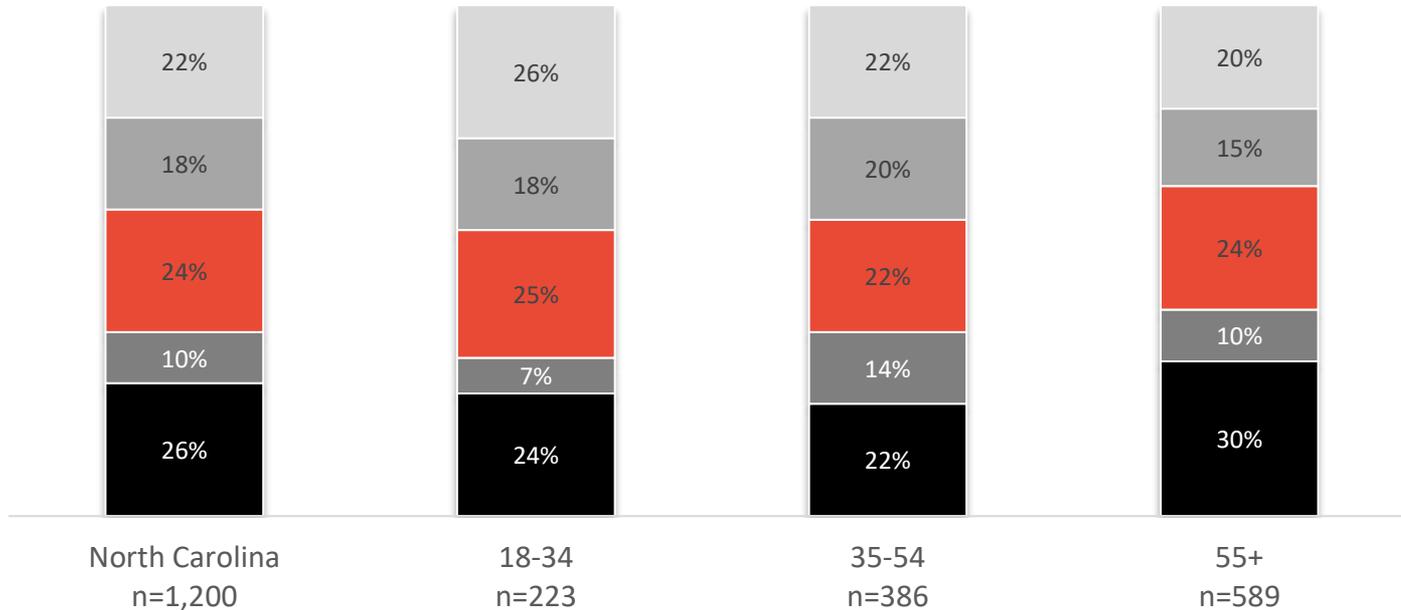


Q19a: Using a scale of 1 (not at all familiar) to 5 (extremely familiar), please indicate how familiar you are with the concept of “Leave No Trace”.
(Question added W4)

Younger Residents are More Familiar Than Older Residents with the Concept of “Leave No Trace”

Resident Age

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



Difference Score

4%

12%

7%

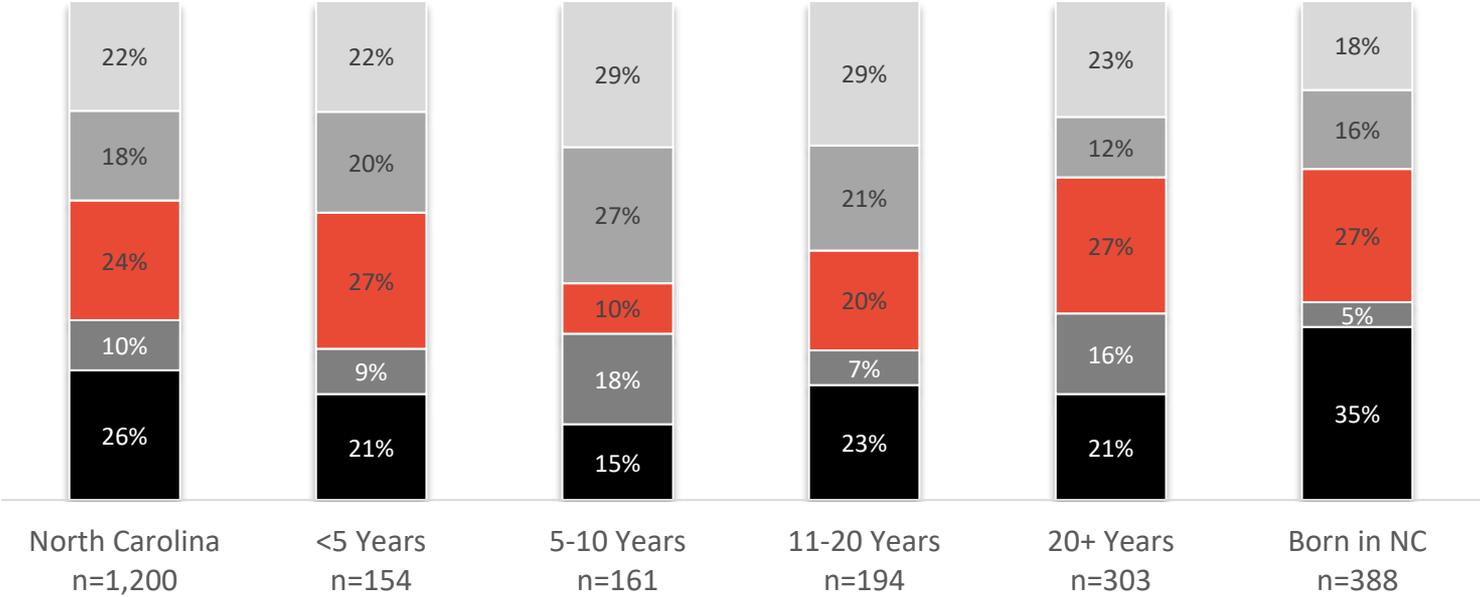
-4%

Q19a: Using a scale of 1 (not at all familiar) to 5 (extremely familiar), please indicate how familiar you are with the concept of “Leave No Trace”. (Question added W4)

Those Living in the State the Longest are Least Familiar with the Concept of “Leave No Trace”

Length of Residency

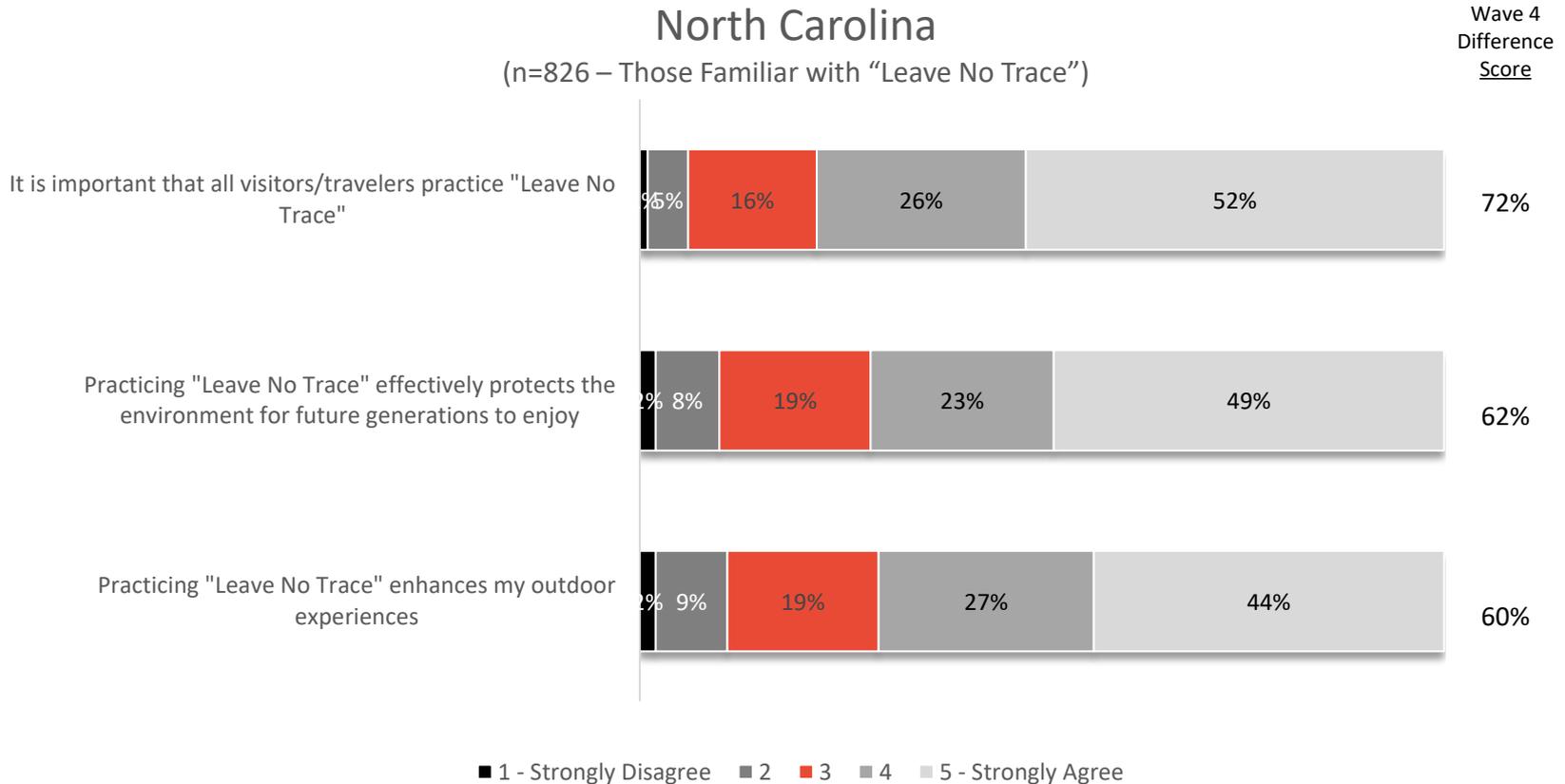
■ 1 - Not at all Familiar ■ 2 ■ 3 ■ 4 ■ 5 - Extremely Familiar



Difference Score	4%	12%	22%	20%	-2%	-7%
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Q19a: Using a scale of 1 (not at all familiar) to 5 (extremely familiar), please indicate how familiar you are with the concept of “Leave No Trace”. (Question added W4)

“Leaving No Trace” is Important to North Carolina Residents



Q19b: Using a scale of 1 (strongly disagree) to 5 (strongly agree), please indicate your level of agreement with each of the following statements. (Question added W4)

Residents Aged 35 and Older Feel Stronger About the Practice of “Leaving No Trace”

North Carolina Difference Scores (%)

	18-34 n=167	35-54 n=273	55+ n=384
It is important that all visitors/travelers practice “Leave No Trace”	57	70	88
Practicing “Leave No Trace” effectively protects the environment for future generations to enjoy	37	72	77
Practicing “Leave No Trace” enhances my outdoor experiences	43	61	74

Q19b: Using a scale of 1 (strongly disagree) to 5 (strongly agree), please indicate your level of agreement with each of the following statements. (Question added W4)

Those Who Have Lived in North Carolina 5 Years or More Generally Feel the Strongest About the Practice of “Leaving No Trace”

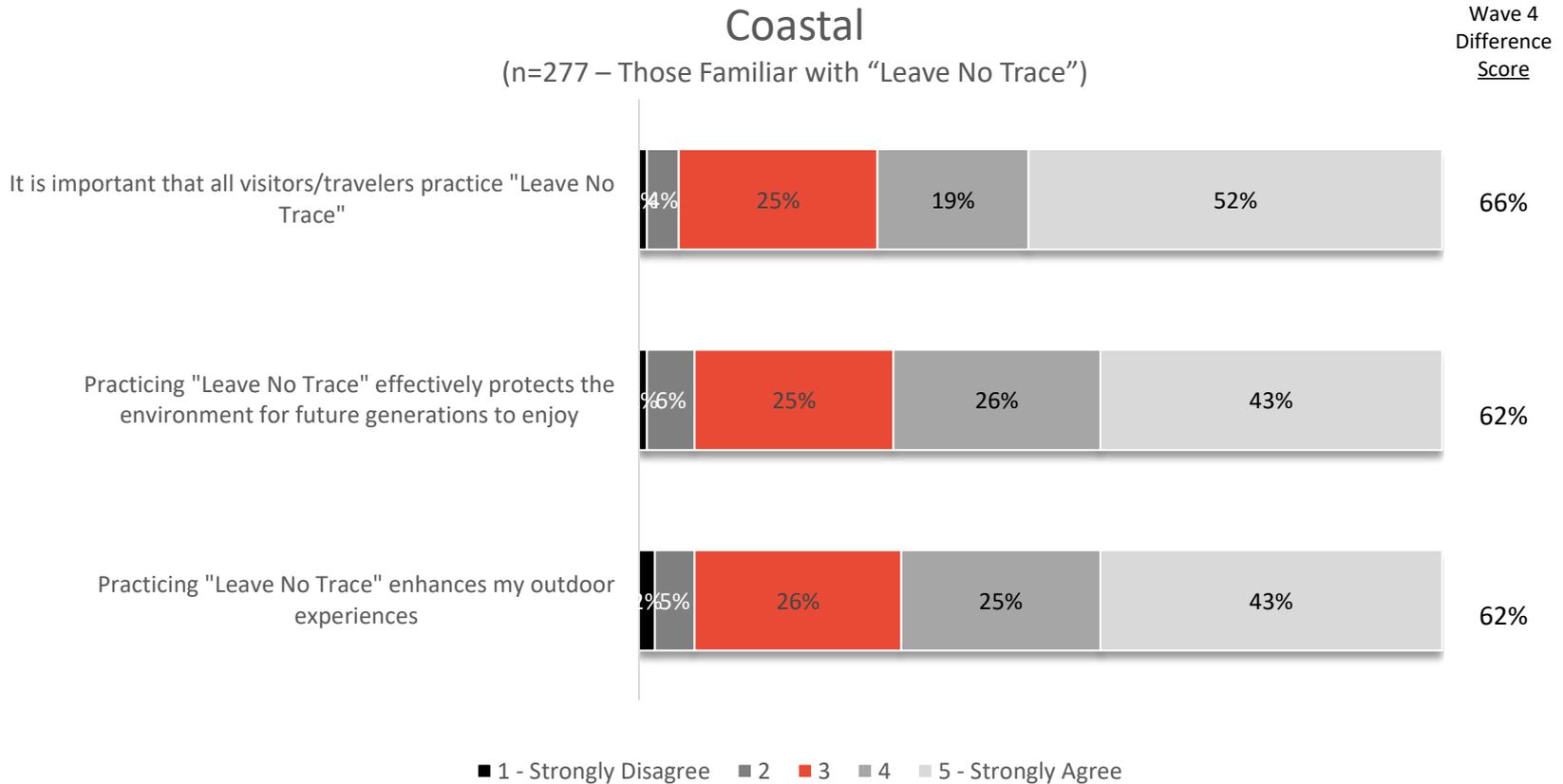
North Carolina

Difference Scores (%)

	<5 Years n=107	5-10 Years n=123	11-20 Years n=136	20+ Years n=207	Born in NC n=253
It is important that all visitors/travelers practice “Leave No Trace”	66	76	84	80	64
Practicing “Leave No Trace” effectively protects the environment for future generations to enjoy	31	68	81	76	58
Practicing “Leave No Trace” enhances my outdoor experiences	52	82	47	67	55

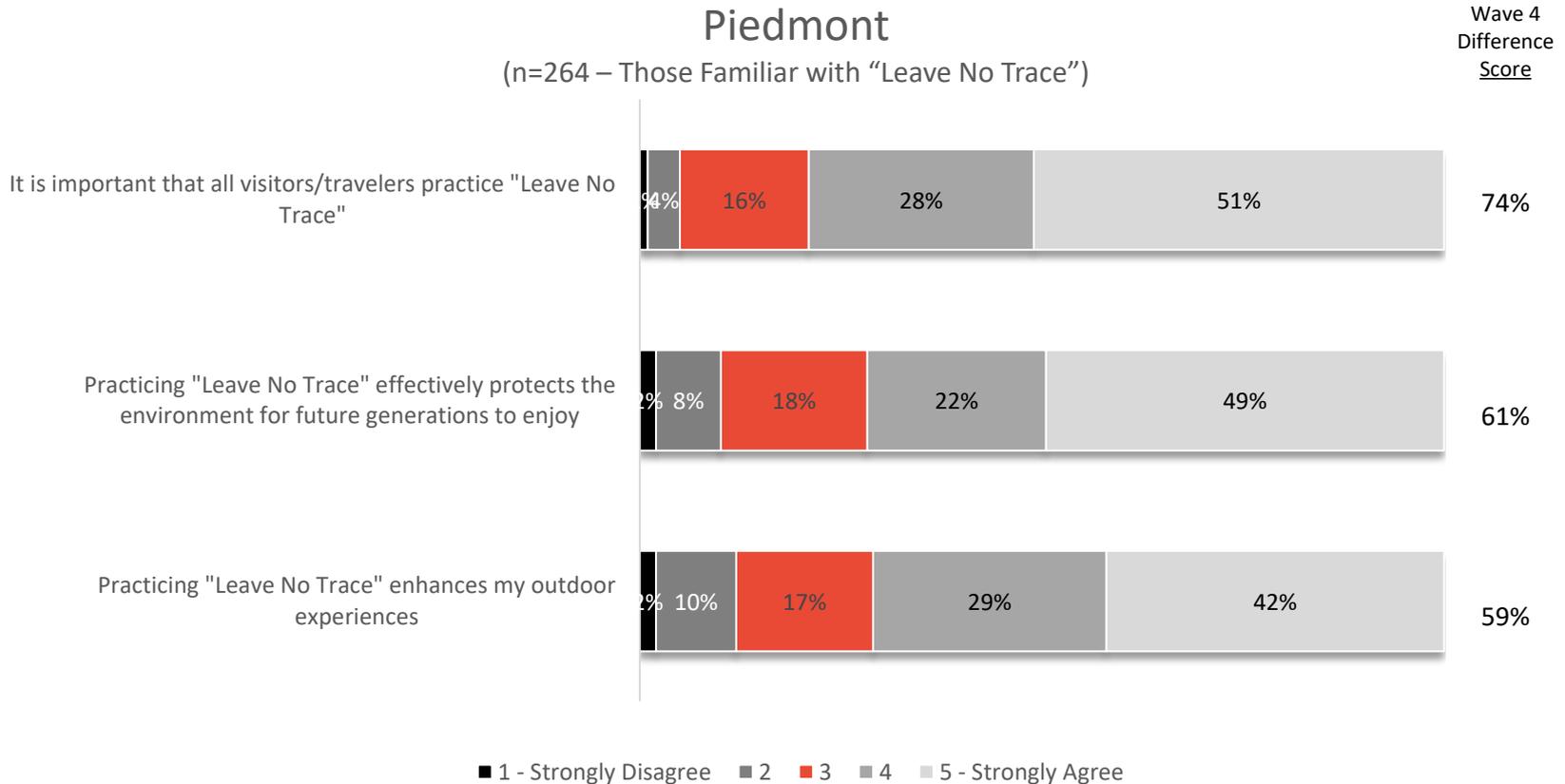
Q19b: Using a scale of 1 (strongly disagree) to 5 (strongly agree), please indicate your level of agreement with each of the following statements. (Question added W4)

“Leaving No Trace” is Important to North Carolina Residents



Q19b: Using a scale of 1 (strongly disagree) to 5 (strongly agree), please indicate your level of agreement with each of the following statements. (Question added W4)

“Leaving No Trace” is Important to North Carolina Residents



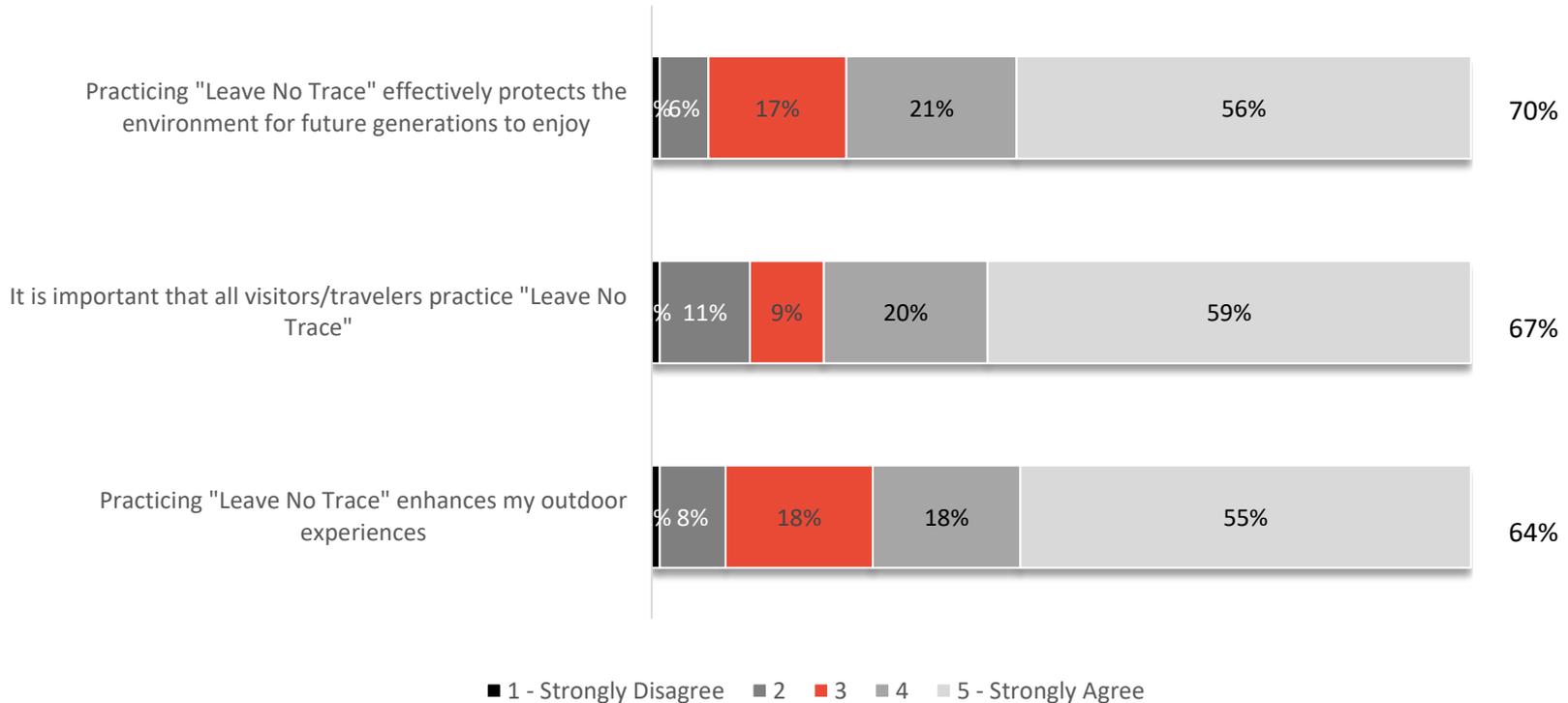
Q19b: Using a scale of 1 (strongly disagree) to 5 (strongly agree), please indicate your level of agreement with each of the following statements. (Question added W4)

“Leaving No Trace” is Important to North Carolina Residents

Mountain

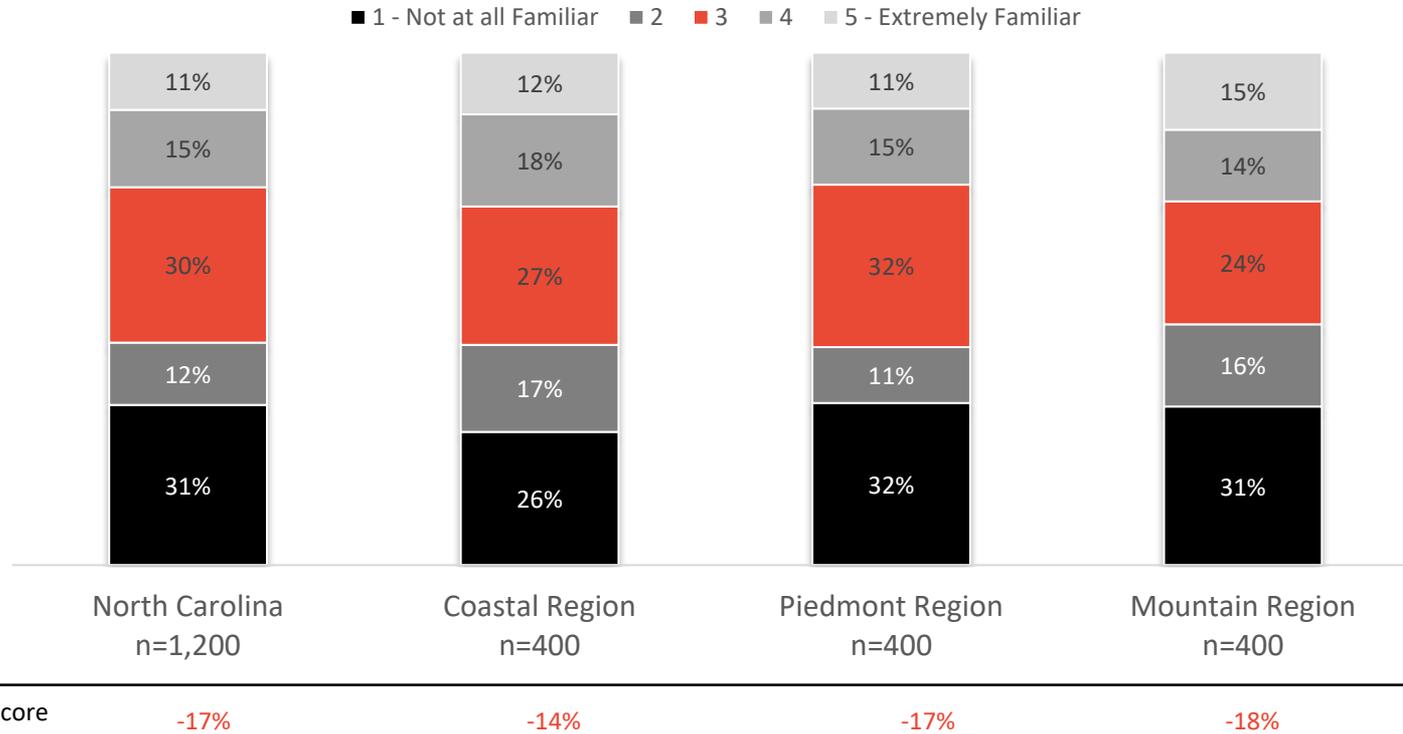
(n=285 – Those Familiar with “Leave No Trace”)

Wave 4
Difference
Score



Q19b: Using a scale of 1 (strongly disagree) to 5 (strongly agree), please indicate your level of agreement with each of the following statements. (Question added W4)

About One in Four North Carolina Residents are Familiar with the Outdoor NC Initiative

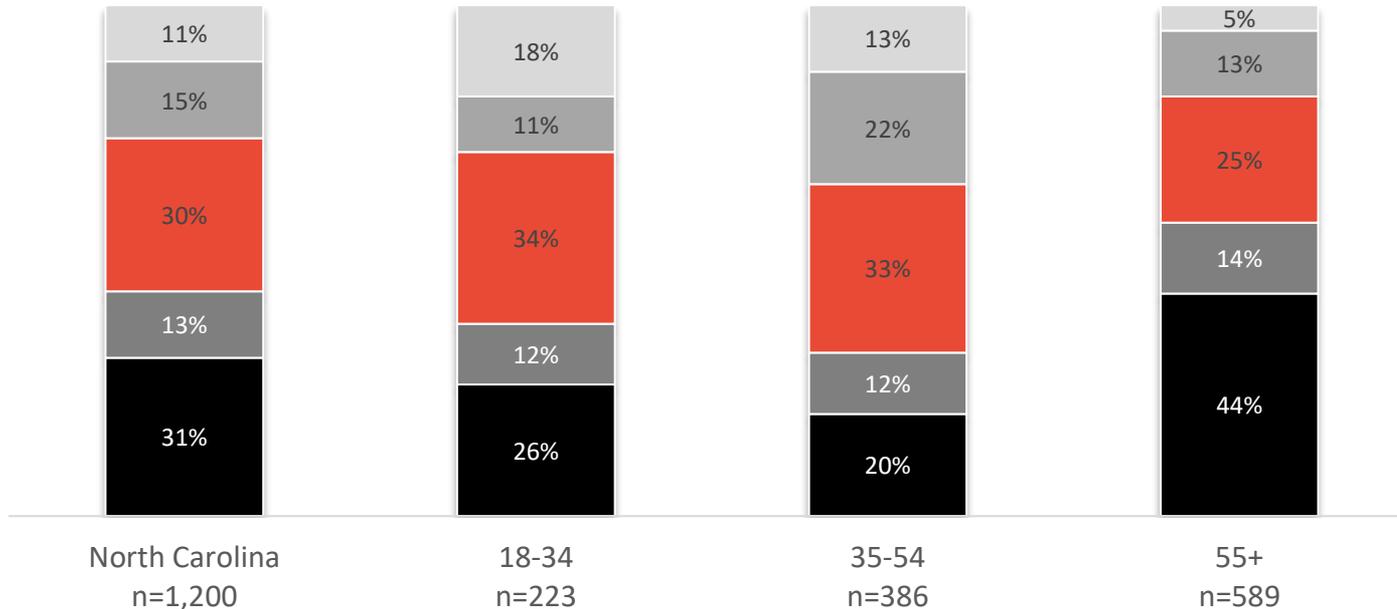


Q21: Using a scale of 1 (not at all familiar) to 5 (extremely familiar), please indicate your level of familiarity with the **Outdoor NC** initiative, designed to ensure North Carolina's treasured outdoor resources continue to thrive for residents and visitors. (Question added W4)

Older Residents, by Far, are the Least Familiar with the Outdoor NC Initiative

Resident Age

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



Difference Score

-17%

-8%

4%

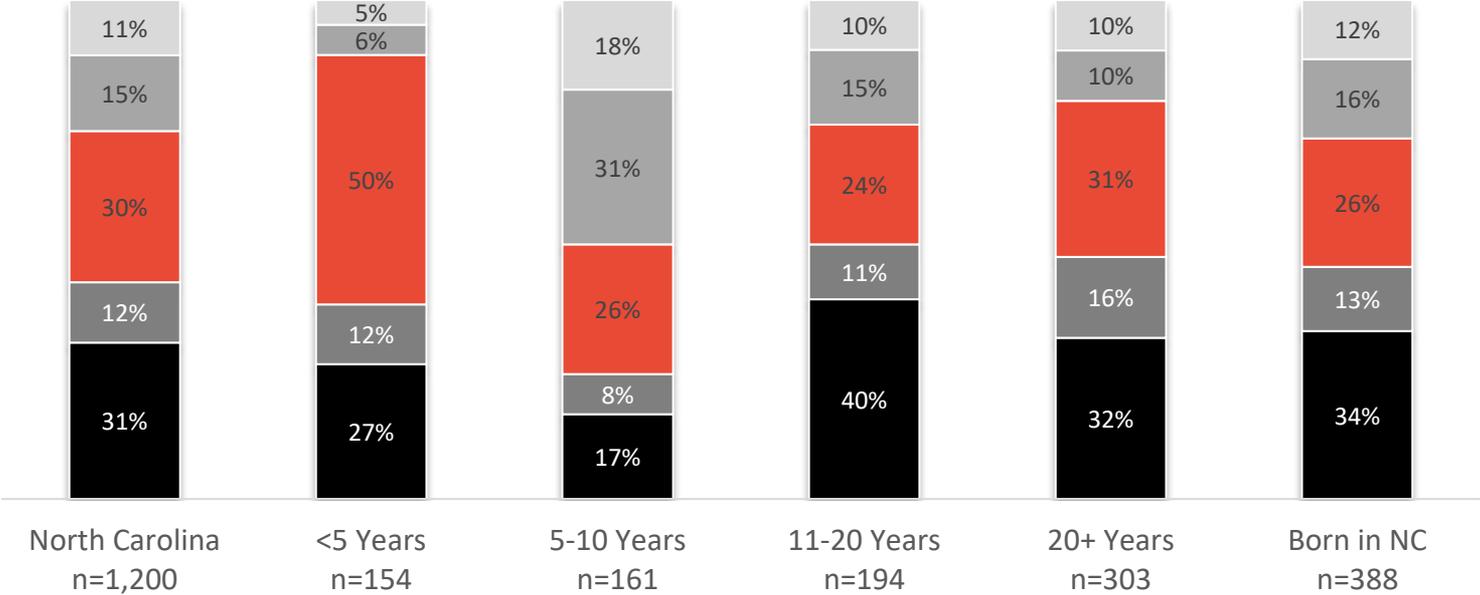
-39%

Q21: Using a scale of 1 (not at all familiar) to 5 (extremely familiar), please indicate your level of familiarity with the **Outdoor NC** initiative, designed to ensure North Carolina's treasured outdoor resources continue to thrive for residents and visitors. (Question added W4)

Those Living in the State 5-10 Years are Most Familiar with the Outdoor NC Initiative

Length of Residency

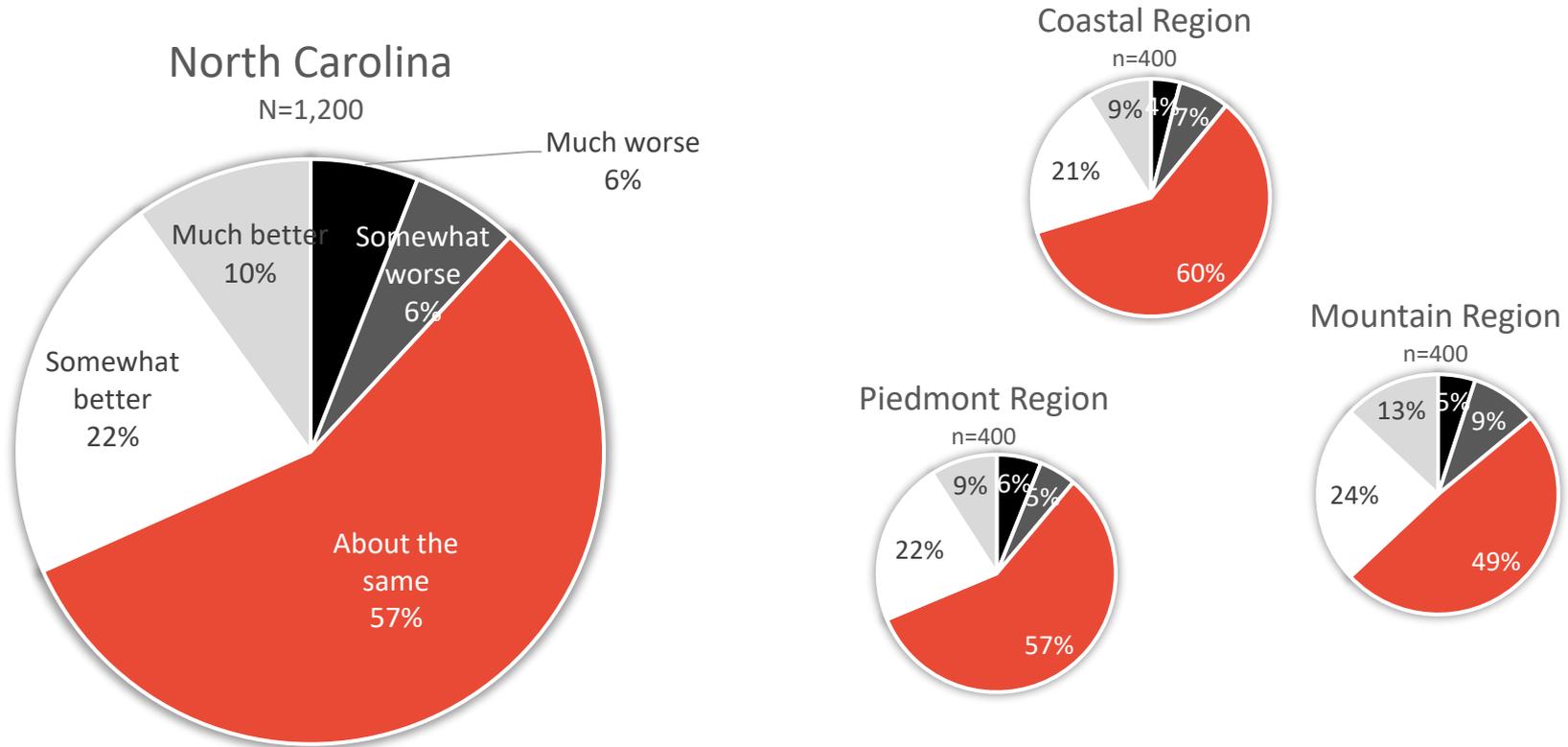
■ 1 - Not at all Familiar ■ 2 ■ 3 ■ 4 ■ 5 - Extremely Familiar



Difference Score	-17%	-28%	24%	-26%	-28%	-19%
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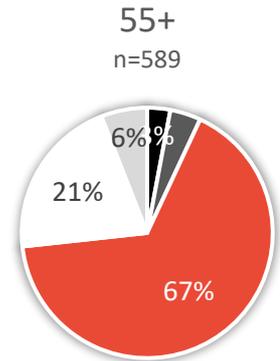
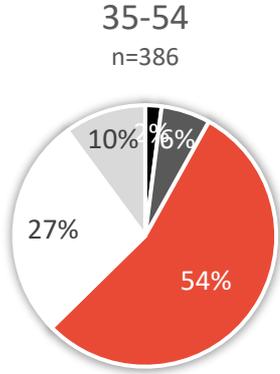
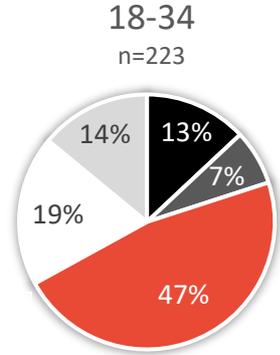
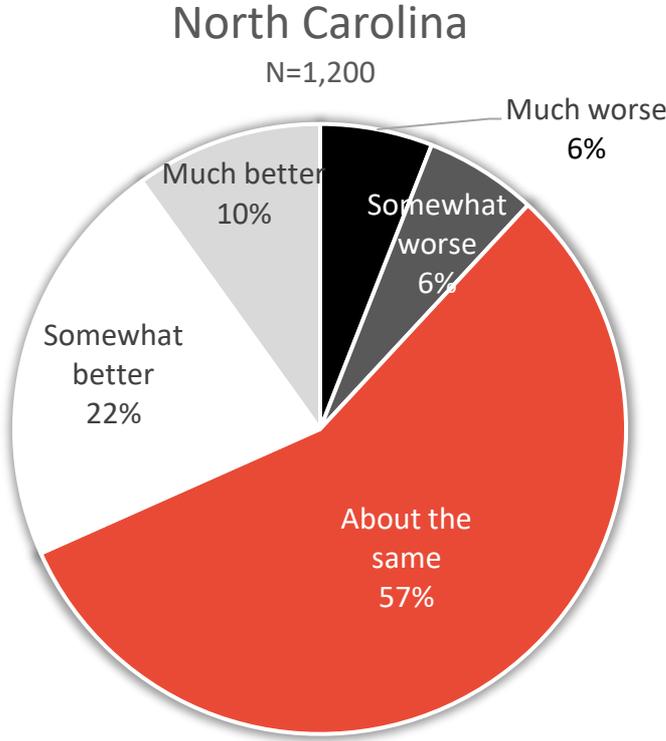
Q21: Using a scale of 1 (not at all familiar) to 5 (extremely familiar), please indicate your level of familiarity with the **Outdoor NC** initiative, designed to ensure North Carolina’s treasured outdoor resources continue to thrive for residents and visitors. (Question added W4)

One-third of Residents Think North Carolina's Sustainability Efforts are Better Than Other States They Have Visited, Down From 40% in Wave 1



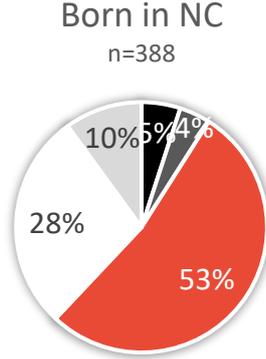
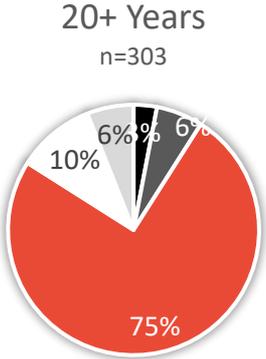
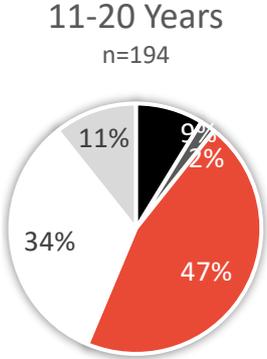
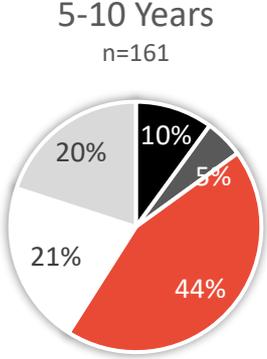
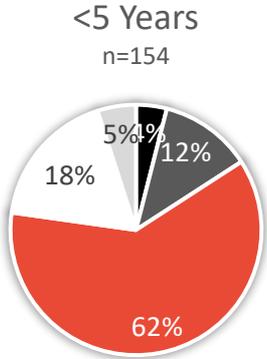
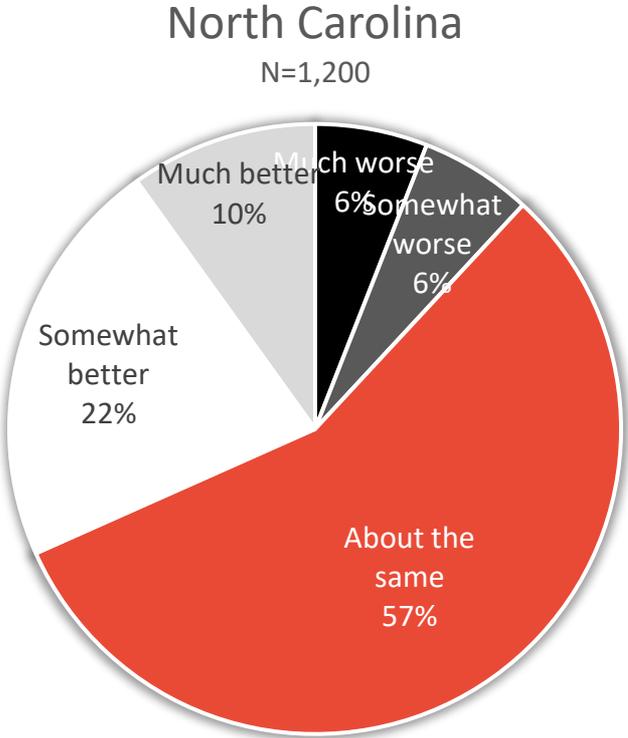
QW1-11: How would you compare North Carolina to other states you have traveled to regarding North Carolina's efforts to embrace sustainable practices for destinations around the state? (Question included in W1 and W4)

Residents Aged Under 55 Are More Likely to Think North Carolina's Sustainability Efforts are Better Than Other States



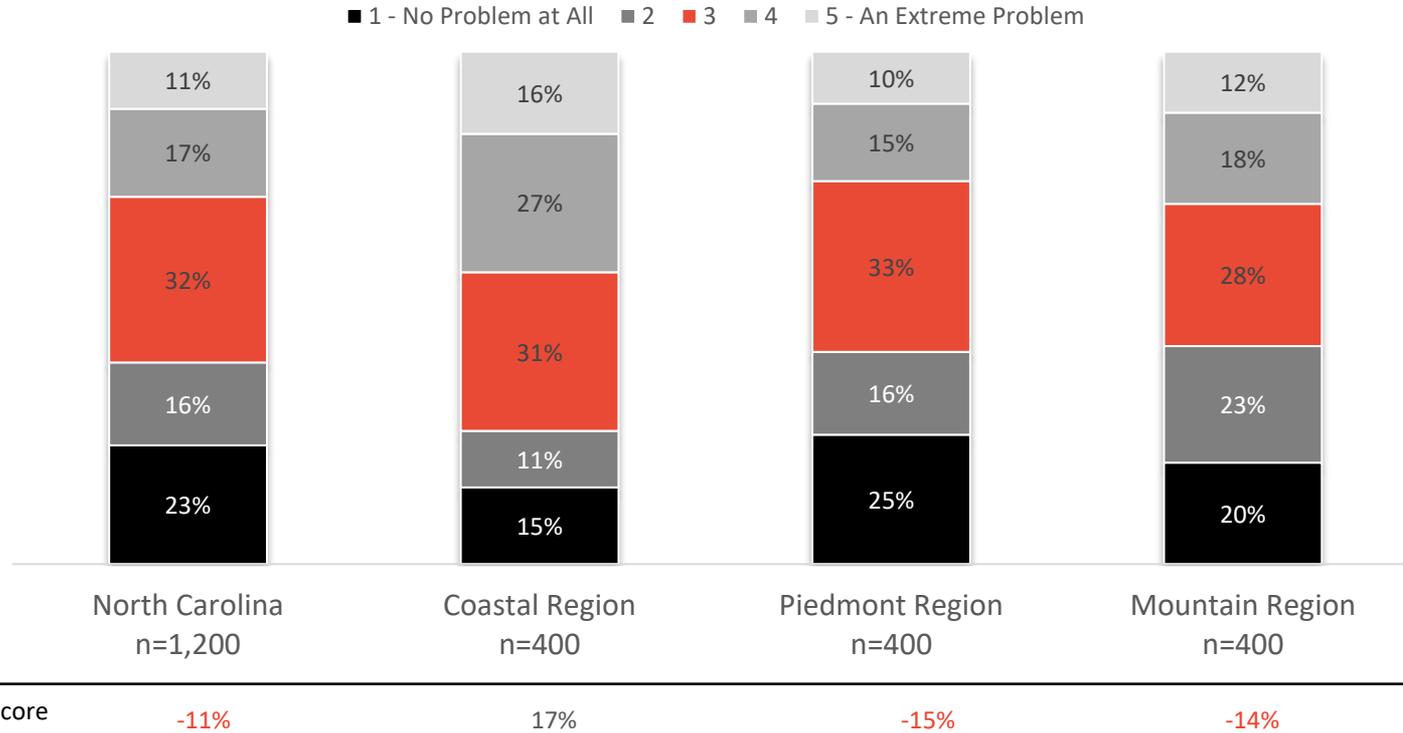
QW1-11: How would you compare North Carolina to other states you have traveled to regarding North Carolina's efforts to embrace sustainable practices for destinations around the state? (Question included in W1 and W4)

Those Living in North Carolina the Longest are the Most Likely to Think North Carolina Sustainability Efforts are on Par with Other States



QW1-11: How would you compare North Carolina to other states you have traveled to regarding North Carolina's efforts to embrace sustainable practices for destinations around the state? (Question included in W1 and W4)

Excluding the Coastal Region, Residents Generally Don't Think Over-tourism is a Problem to Their Communities

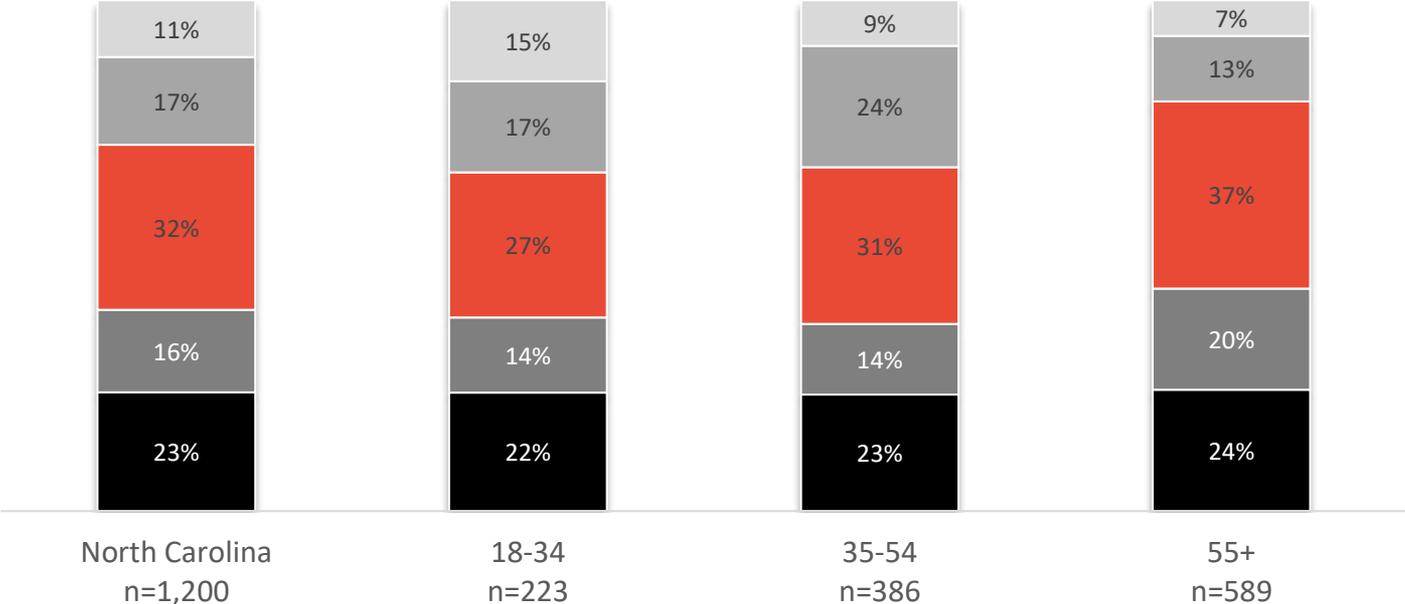


Q20: Using a scale of 1 (no problem at all) to 5 (an extreme problem), please indicate how much of a problem you think over-tourism is to your community. Over-tourism is defined as the perceived congestion or overcrowding from an excess of tourists, resulting in conflicts with locals. (Question added W4)

The Older Residents Get, the Least Likely They are to Think Over-tourism is a Problem to Their Communities

Resident Age

■ 1 - No Problem at All ■ 2 ■ 3 ■ 4 ■ 5 -An Extreme Problem



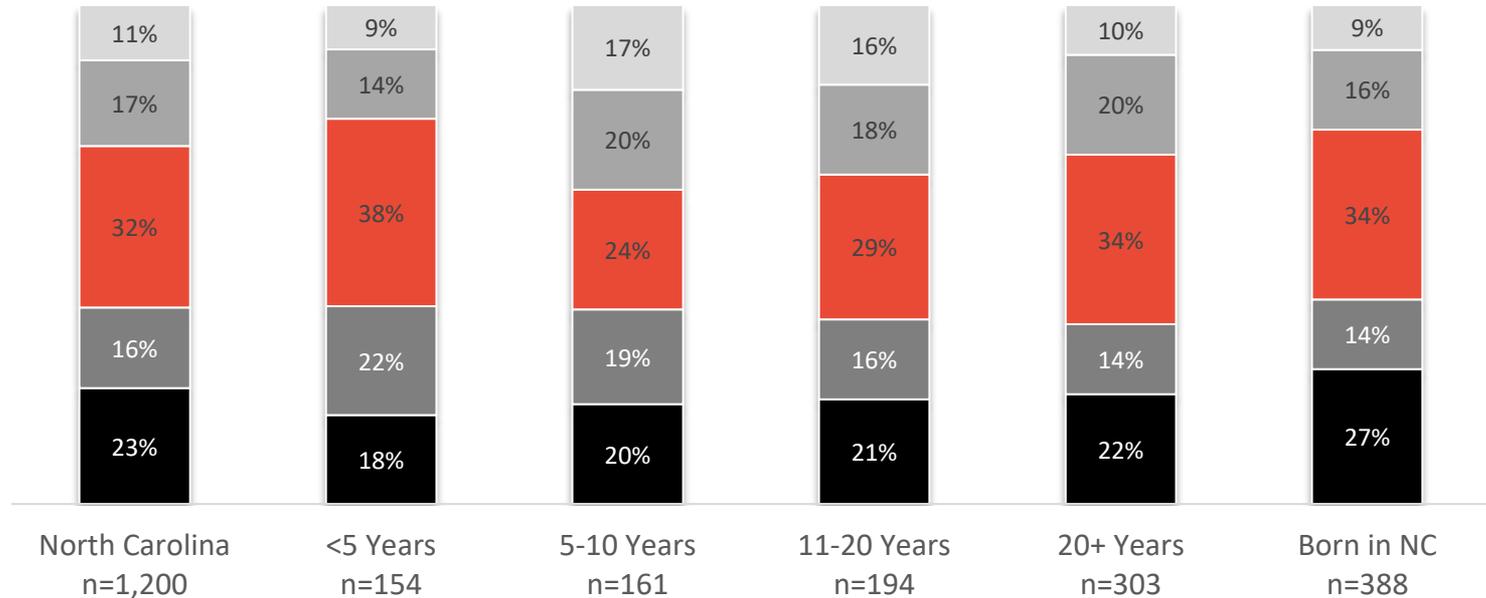
Difference Score	-11%	1%	-4%	-24%
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Q20: Using a scale of 1 (no problem at all) to 5 (an extreme problem), please indicate how much of a problem you think over-tourism is to your community. Over-tourism is defined as the perceived congestion or overcrowding from an excess of tourists, resulting in conflicts with locals. (Question added W4)

The Longer Residents Live in North Carolina, the Less of a Problem they Think Over-tourism is to Their Communities

Length of Residency

■ 1 - No Problem at All ■ 2 ■ 3 ■ 4 ■ 5 - An Extreme Problem



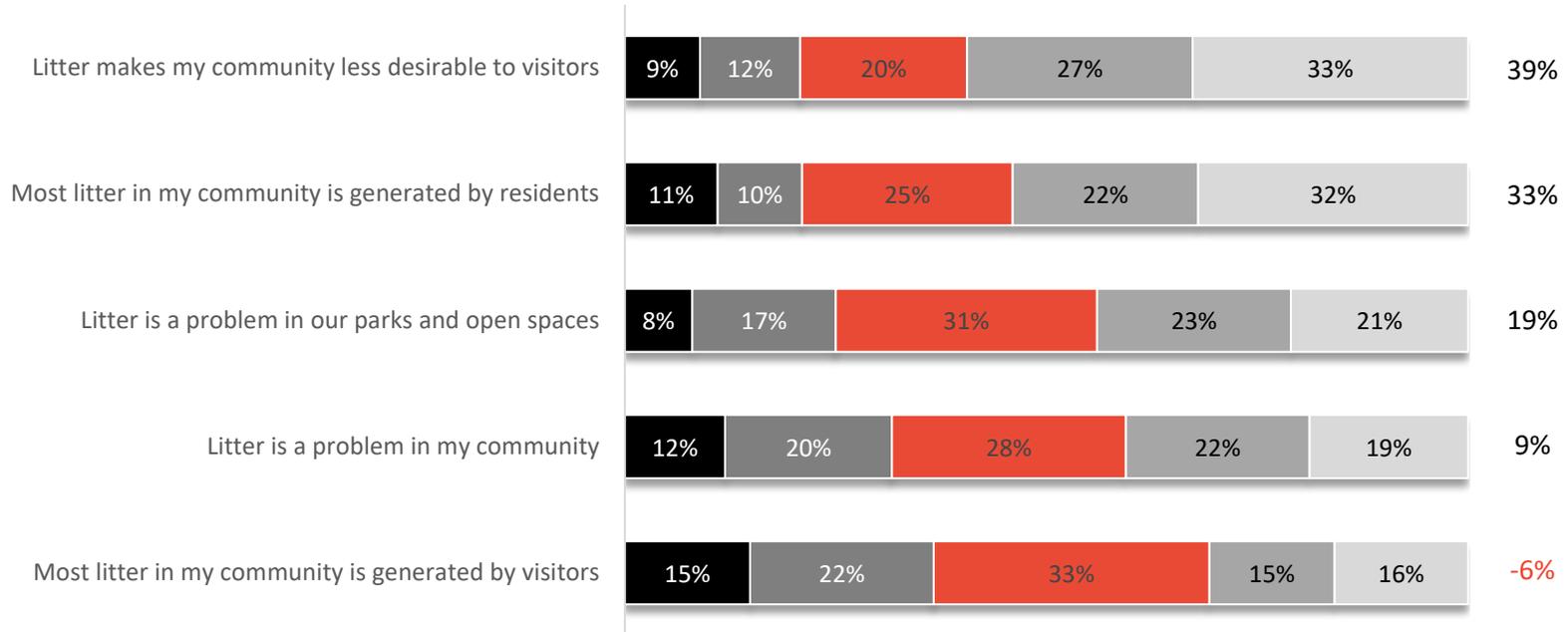
Difference Score	North Carolina	<5 Years	5-10 Years	11-20 Years	20+ Years	Born in NC
	-11%	-18%	-3%	-3%	-6%	-16%

Q20: Using a scale of 1 (no problem at all) to 5 (an extreme problem), please indicate how much of a problem you think over-tourism is to your community. Over-tourism is defined as the perceived congestion or overcrowding from an excess of tourists, resulting in conflicts with locals. (Question added W4)

Most Residents Don't Think Litter is a Problem in their Community, but Litter That is Generated is Created by Residents

North Carolina
(n=1,200)

Wave 4
Difference
Score



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

Q22: Using a scale of 1 (strongly disagree) to 5 (extremely agree), please indicate your level of agreement with each of the following statements. (Question added W4)

Residents Under 55 are More Likely to Think Litter in their Communities is Generated by Visitors Than are Older Residents

North Carolina

Difference Scores (%)

	18-34 n=223	35-54 n=386	55+ n=589
Litter makes my community less desirable to visitors	27	47	41
Most litter in my community is generated by residents	21	45	33
Litter is a problem in our parks and open spaces	4	24	27
Litter is a problem in my community	4	20	3
Most litter in my community is generated by visitors	3	9	-26

Q22: Using a scale of 1 (strongly disagree) to 5 (extremely agree), please indicate your level of agreement with each of the following statements. (Question added W4)

Those Who Have Lived in North Carolina the Least Amount of Time Don't Think Litter is a Problem in Their Community

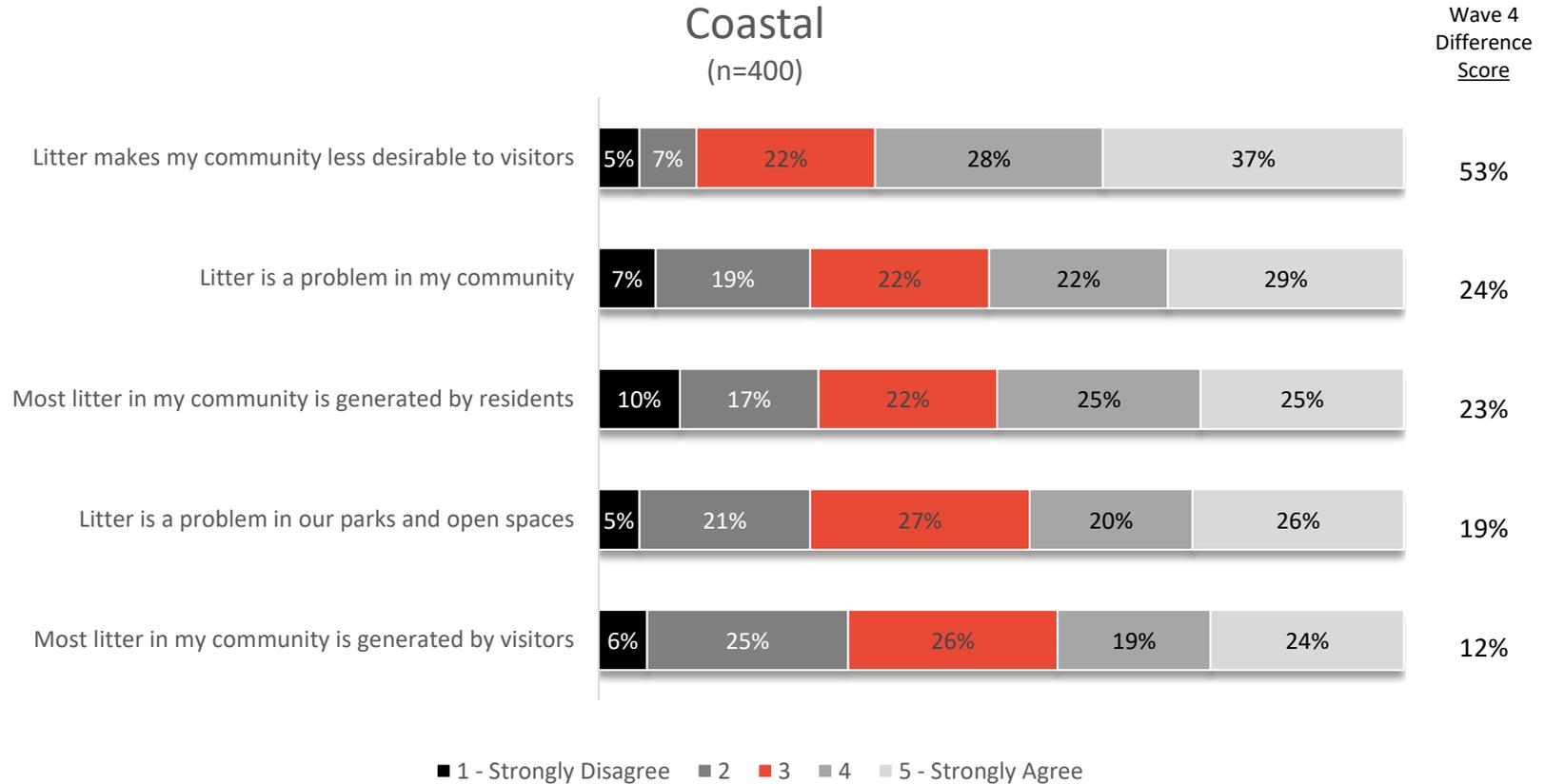
North Carolina

Difference Scores (%)

	<5 Years n=154	5-10 Years n=161	11-20 Years n=194	20+ Years n=303	Born in NC n=388
Litter makes my community less desirable to visitors	27	31	57	50	33
Most litter in my community is generated by residents	11	43	40	40	31
Litter is a problem in our parks and open spaces	-5	30	31	40	9
Litter is a problem in my community	-25	14	20	11	14
Most litter in my community is generated by visitors	-4	20	-7	-16	-11

Q22: Using a scale of 1 (strongly disagree) to 5 (extremely agree), please indicate your level of agreement with each of the following statements. (Question added W4)

Litter in My Community

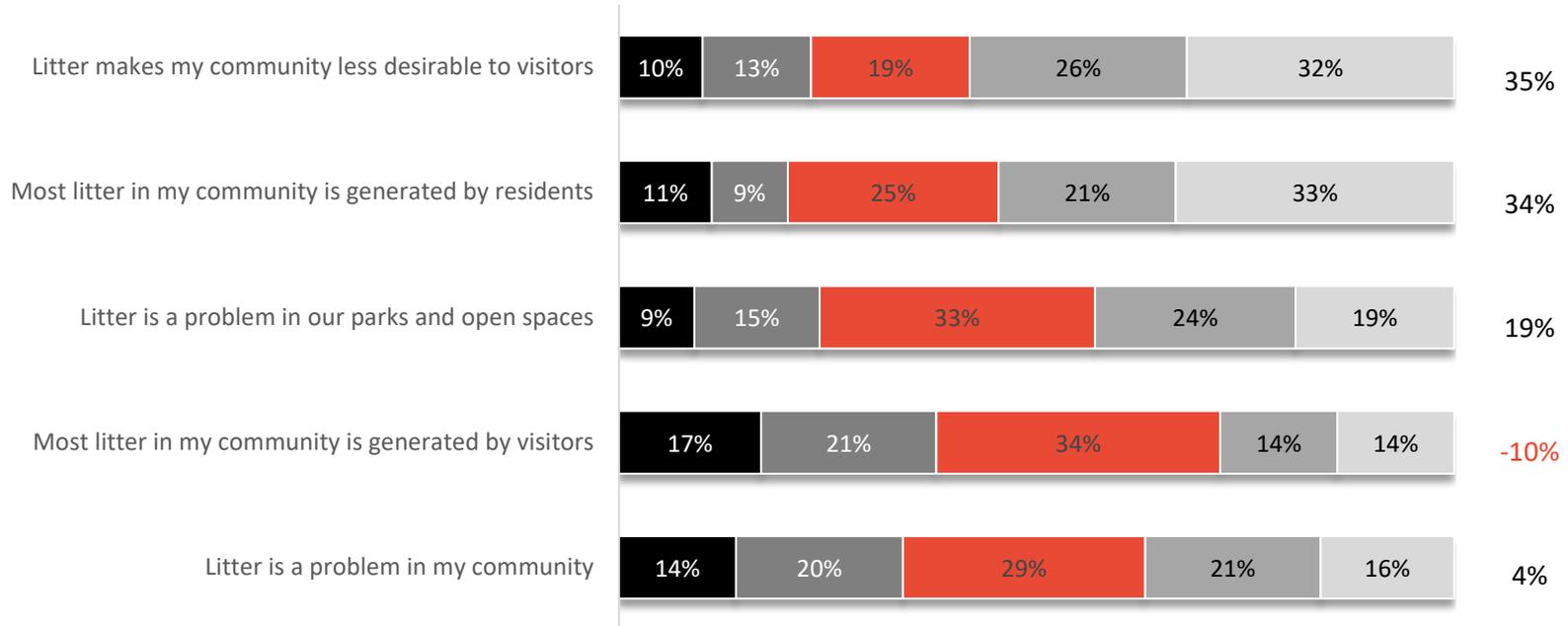


Q22: Using a scale of 1 (strongly disagree) to 5 (extremely agree), please indicate your level of agreement with each of the following statements. (Question added W4)

Litter in My Community

Piedmont
(n=400)

Wave 4
Difference
Score



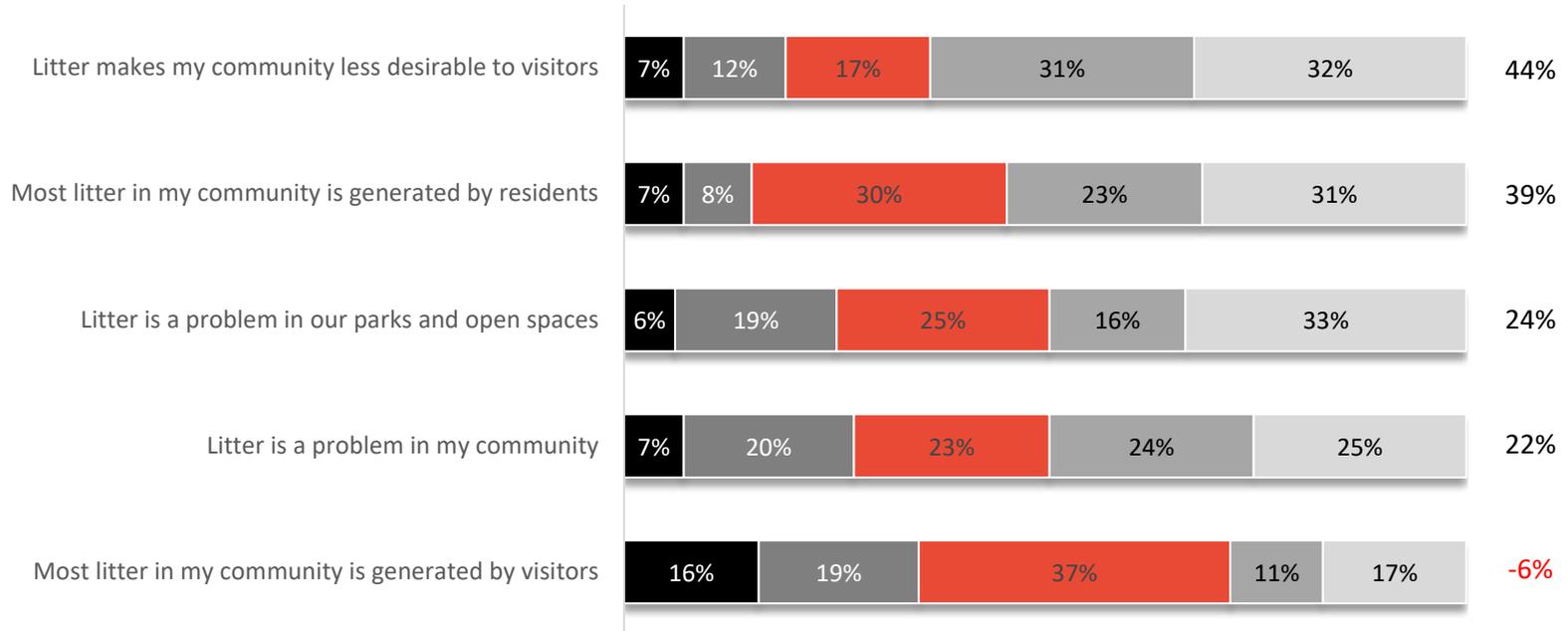
■ 1 - Strongly Disagree ■ 2 ■ 3 ■ 4 ■ 5 - Strongly Agree

Q22: Using a scale of 1 (strongly disagree) to 5 (extremely agree), please indicate your level of agreement with each of the following statements. (Question added W4)

Litter in My Community

Mountain (n=400)

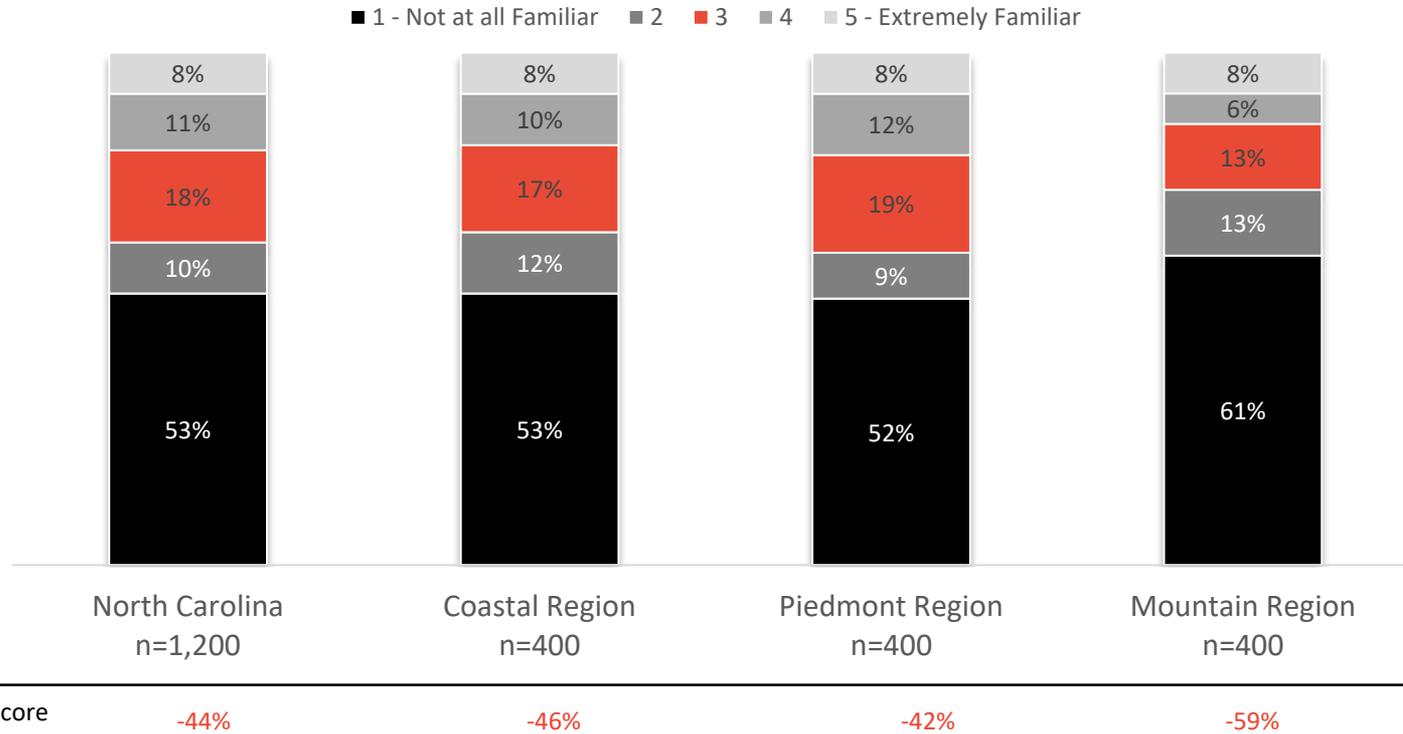
Wave 4
Difference
Score



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

Q22: Using a scale of 1 (strongly disagree) to 5 (extremely agree), please indicate your level of agreement with each of the following statements. (Question added W4)

Most North Carolina Residents are Unfamiliar with the “Swat a Litterbug” Campaign

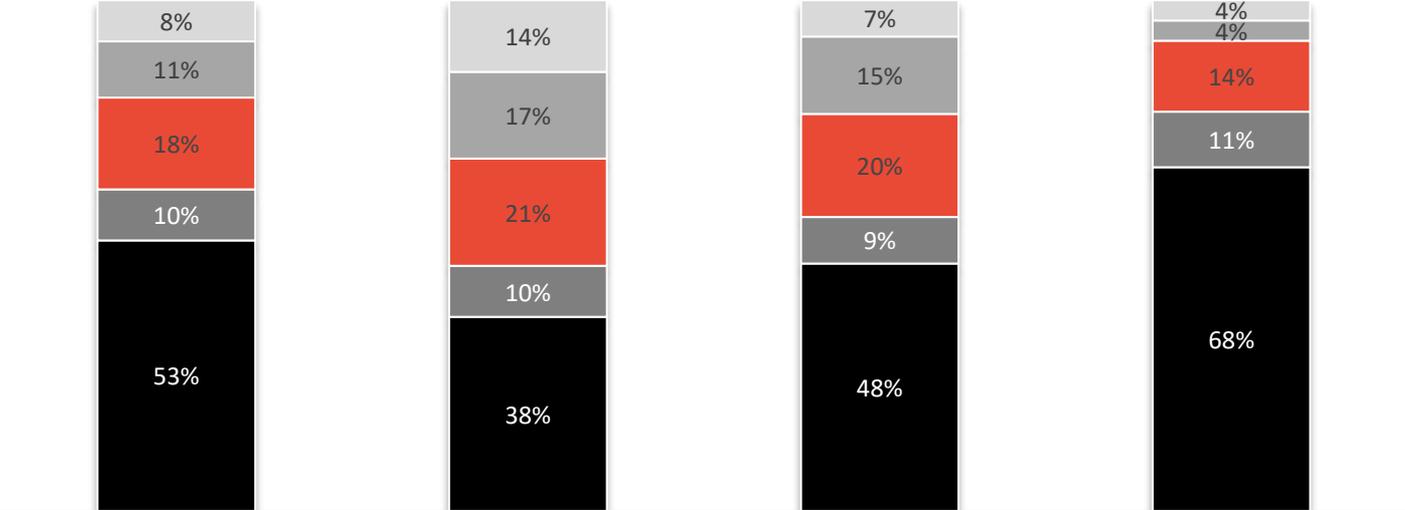


Q23: Using a scale of 1 (not at all familiar) to 5 (extremely familiar), please indicate your level of familiarity with the **Swat a Litterbug** campaign. (Question added W4)

The Older Residents Get, the Less Aware They are of the “Swat a Litterbug” Campaign

Resident Age

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



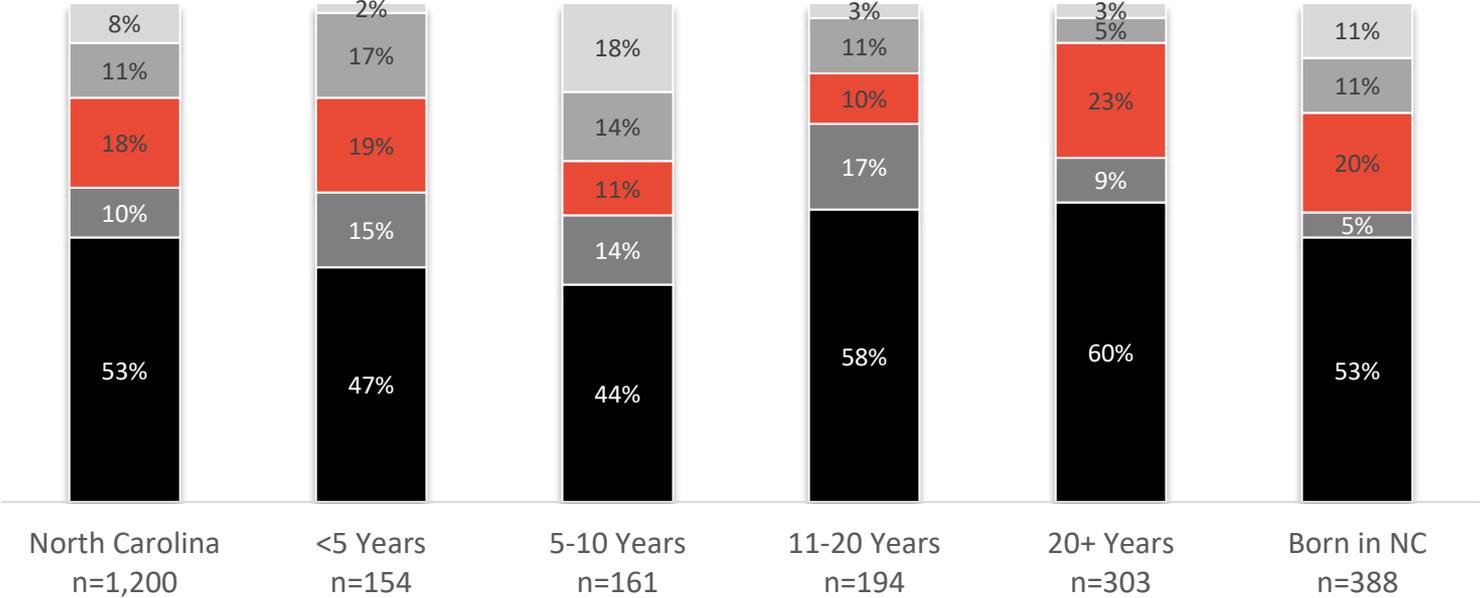
	North Carolina n=1,200	18-34 n=223	35-54 n=386	55+ n=589
Difference Score	-44%	-18%	-35%	-72%

Q23: Using a scale of 1 (not at all familiar) to 5 (extremely familiar), please indicate your level of familiarity with the **Swat a Litterbug** campaign. (Question added W4)

Those Living in the State 5-10 Years are Most Familiar with the “Swat a Litterbug” Campaign

Length of Residency

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



Difference Score	-44%	-43%	-25%	-62%	-60%	-37%
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Q23: Using a scale of 1 (not at all familiar) to 5 (extremely familiar), please indicate your level of familiarity with the **Swat a Litterbug** campaign. (Question added W4)

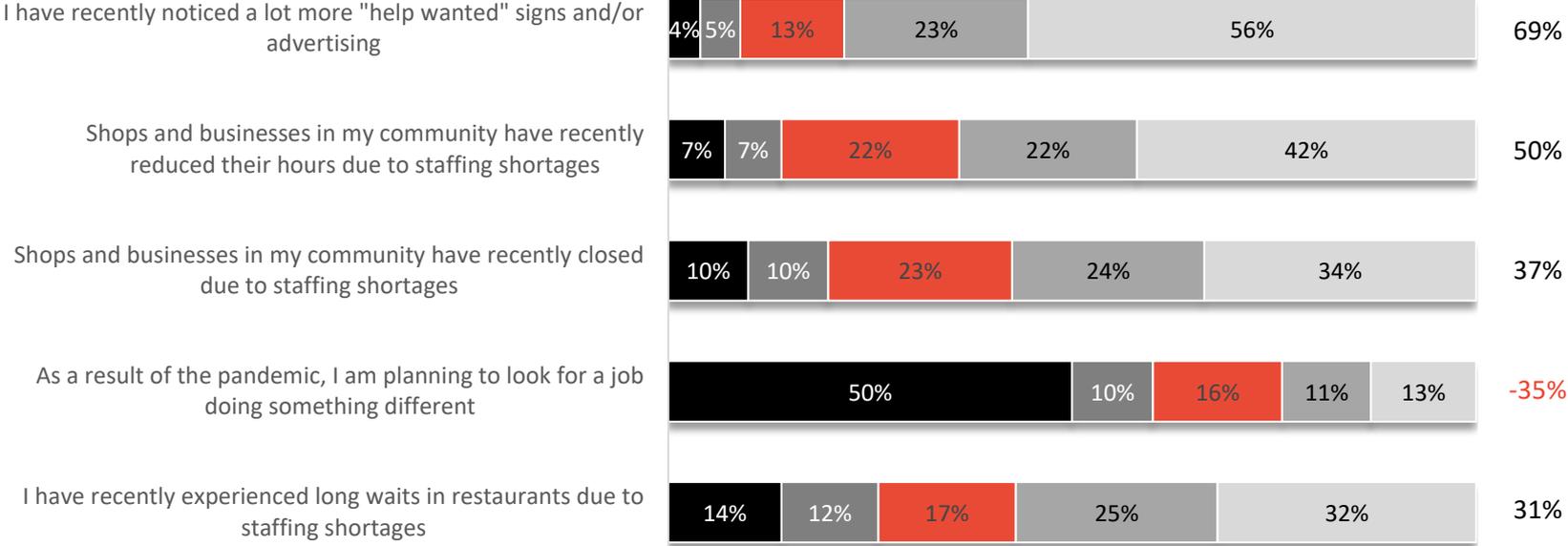


Workforce Impacts

Staffing Shortages are Having an Impact in North Carolina Communities, While Less Than Half the Residents Plan to Switch Jobs

North Carolina
(n=1,200)

Wave 4
Difference
Score



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

Q24: Using a scale of 1 (strongly disagree) to 5 (extremely agree), please indicate your level of agreement with each of the following statements. (Question added W4)



Youngest Residents are Most Likely to Look for a Different Type of Employment as a Result of the Pandemic

North Carolina

Difference Scores (%)

	18-34 n=223	35-54 n=386	55+ n=589
I have recently noticed a lot more "help wanted" signs and/or advertising	52	73	80
Shops and businesses in my community have recently reduced their hours due to staffing shortages	33	59	56
Shops and businesses in my community have recently closed due to staffing shortages	32	51	31
As a result of the pandemic, I am planning to look for a job doing something different	5	-23	-56
I have recently experienced long waits in restaurants due to staffing shortages	44	38	15

Q24: Using a scale of 1 (strongly disagree) to 5 (extremely agree), please indicate your level of agreement with each of the following statements. (Question added W4)

The Longer Residents Live in the State the Less Likely they are to Look for Different Job as a Result of the Pandemic

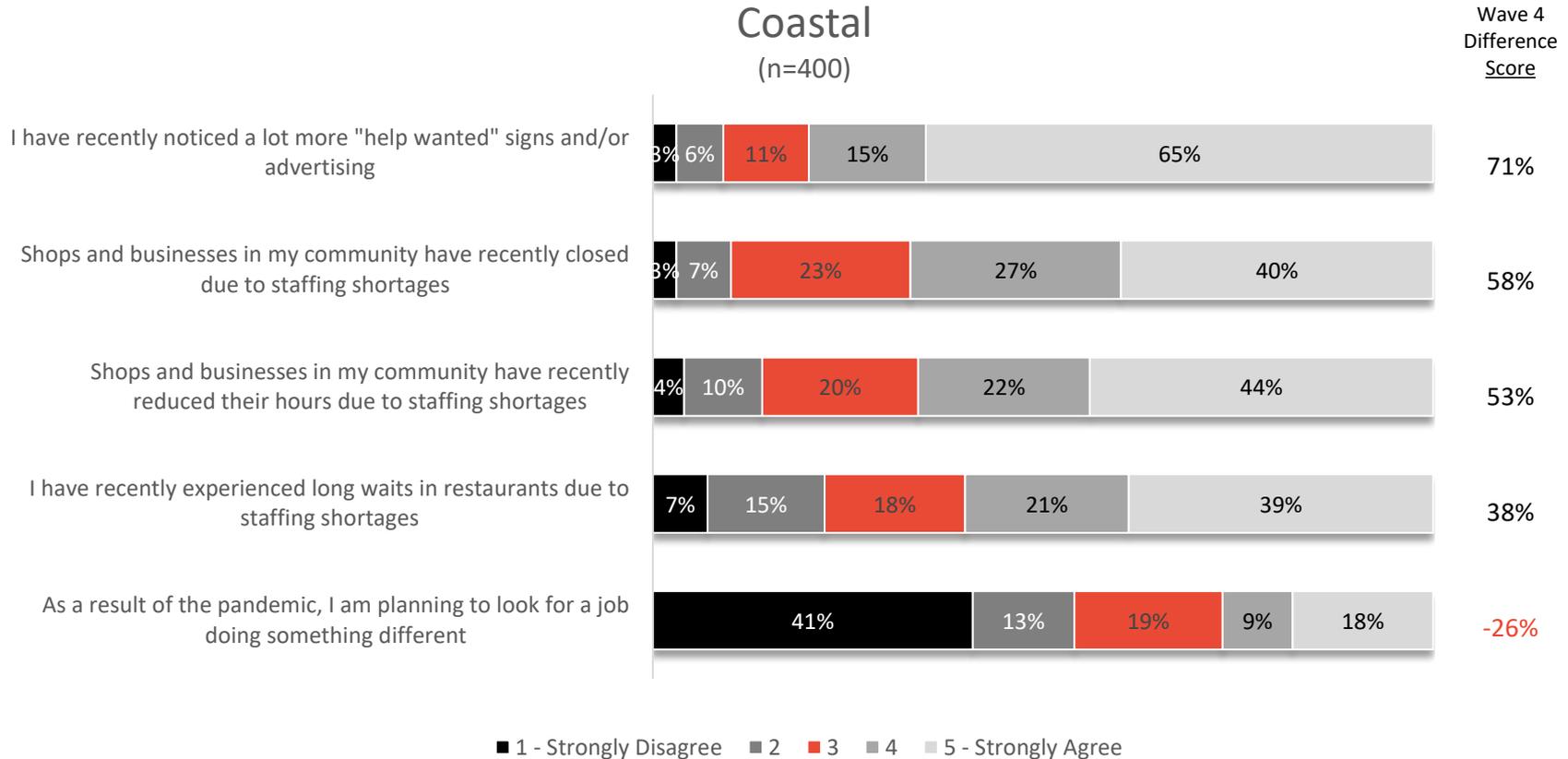
North Carolina

Difference Scores (%)

	<5 Years n=154	5-10 Years n=161	11-20 Years n=194	20+ Years n=303	Born in NC n=388
I have recently noticed a lot more "help wanted" signs and/or advertising	58	73	82	82	61
Shops and businesses in my community have recently reduced their hours due to staffing shortages	32	60	57	51	50
Shops and businesses in my community have recently closed due to staffing shortages	44	48	53	42	23
As a result of the pandemic, I am planning to look for a job doing something different	-24	-22	-38	-58	-31
I have recently experienced long waits in restaurants due to staffing shortages	22	32	30	24	37

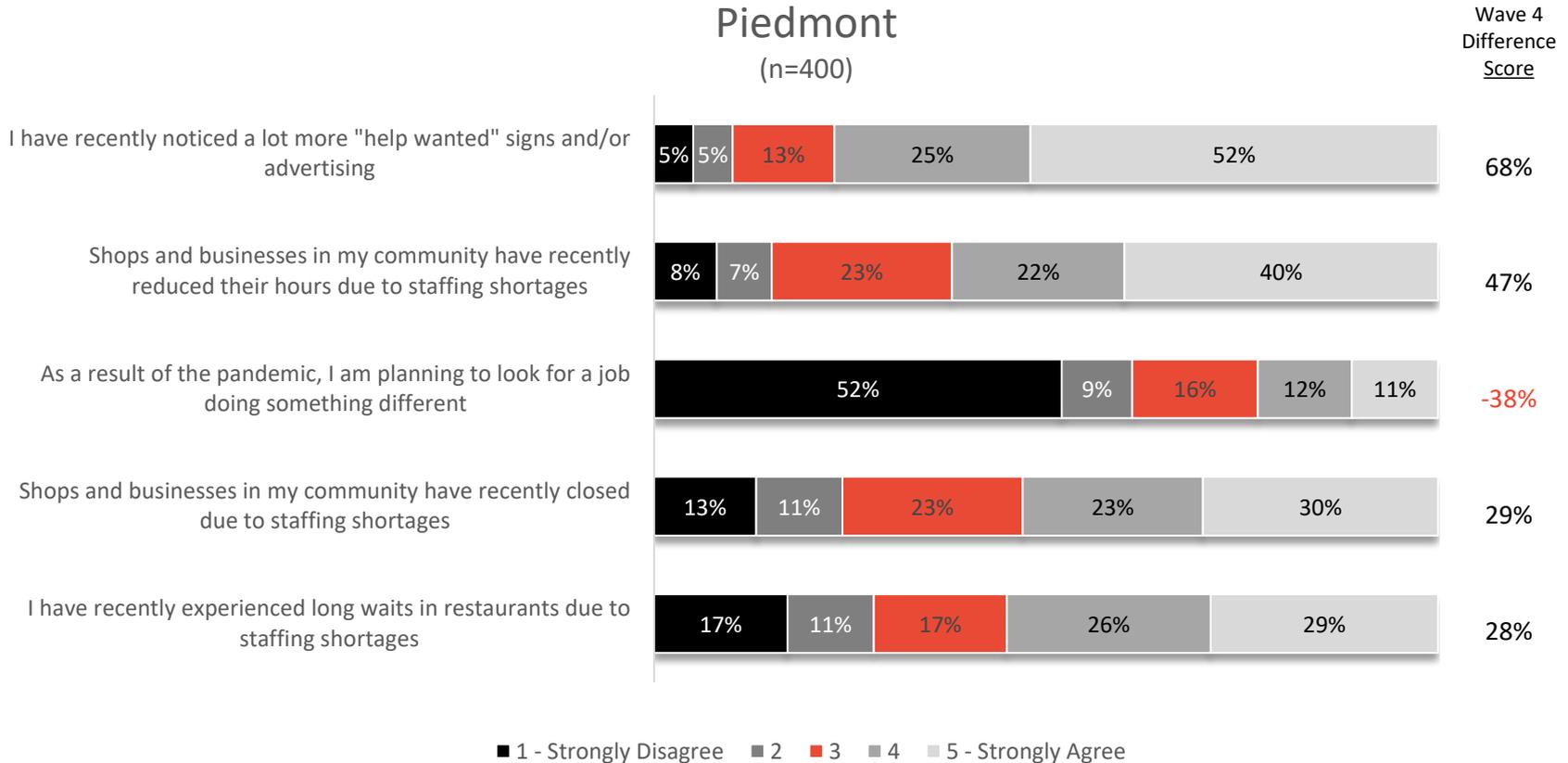
Q24: Using a scale of 1 (strongly disagree) to 5 (extremely agree), please indicate your level of agreement with each of the following statements. (Question added W4)

Workforce Impacts



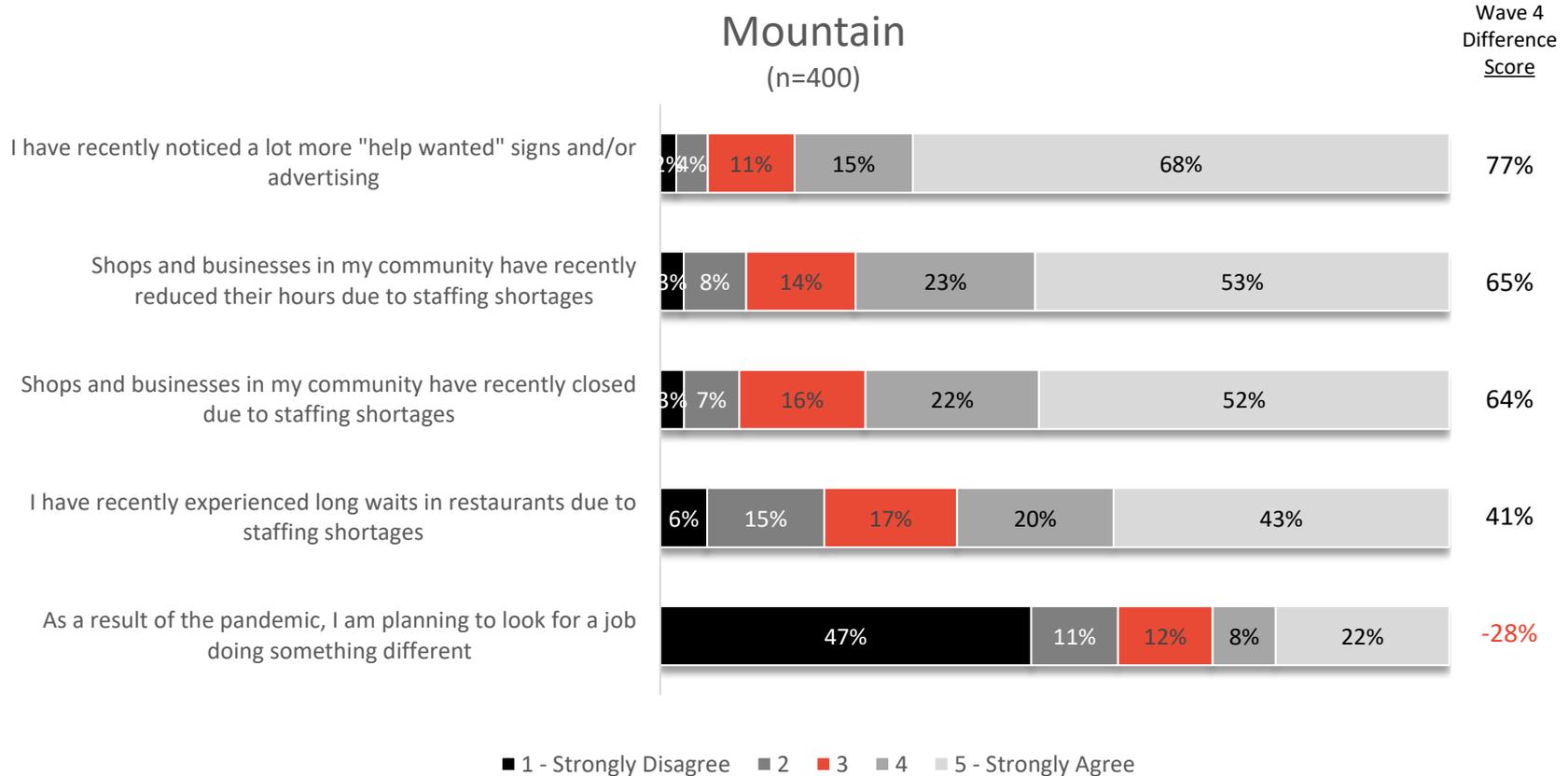
Q24: Using a scale of 1 (strongly disagree) to 5 (extremely agree), please indicate your level of agreement with each of the following statements. (Question added W4)

Workforce Impacts



Q24: Using a scale of 1 (strongly disagree) to 5 (extremely agree), please indicate your level of agreement with each of the following statements. (Question added W4)

Workforce Impacts

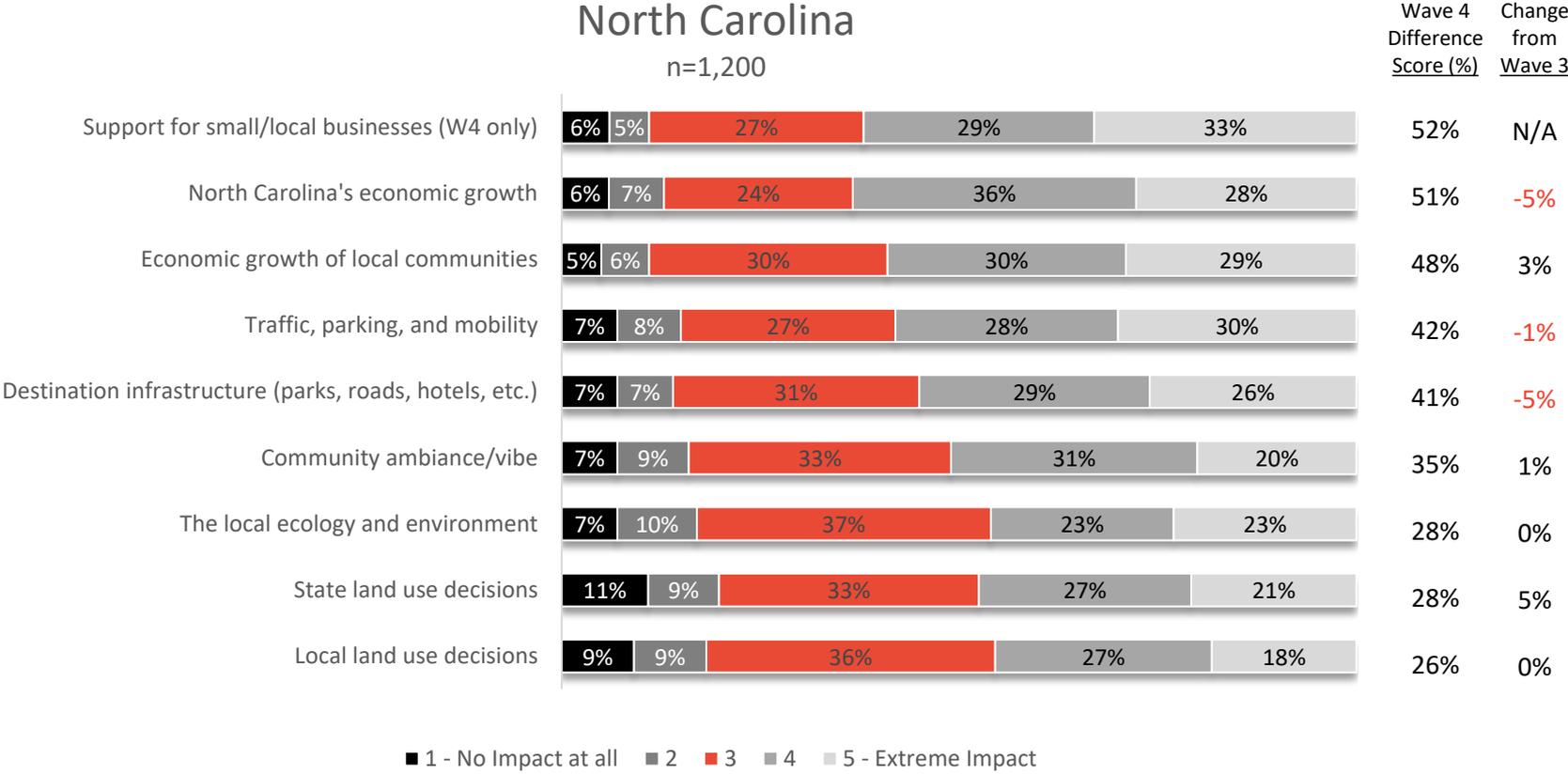


Q24: Using a scale of 1 (strongly disagree) to 5 (extremely agree), please indicate your level of agreement with each of the following statements. (Question added W4)



Impact of Tourism

Residents Feel Tourism Has Most Impact on Small Businesses and on Economic Growth



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=223	35-54 n=386	55+ n=589
Support for small/local businesses (W4 only)	44	57	52
North Carolina's economic growth	35	61	56
Economic growth of local communities	31	59	53
Traffic, parking, and mobility	31	54	41
Destination infrastructure (parks, roads, hotels, etc.)	30	47	45
Community ambiance/vibe	35	55	21
The local ecology and environment	20	30	31
State land use decisions	37	26	22
Local land use decisions	24	38	19

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

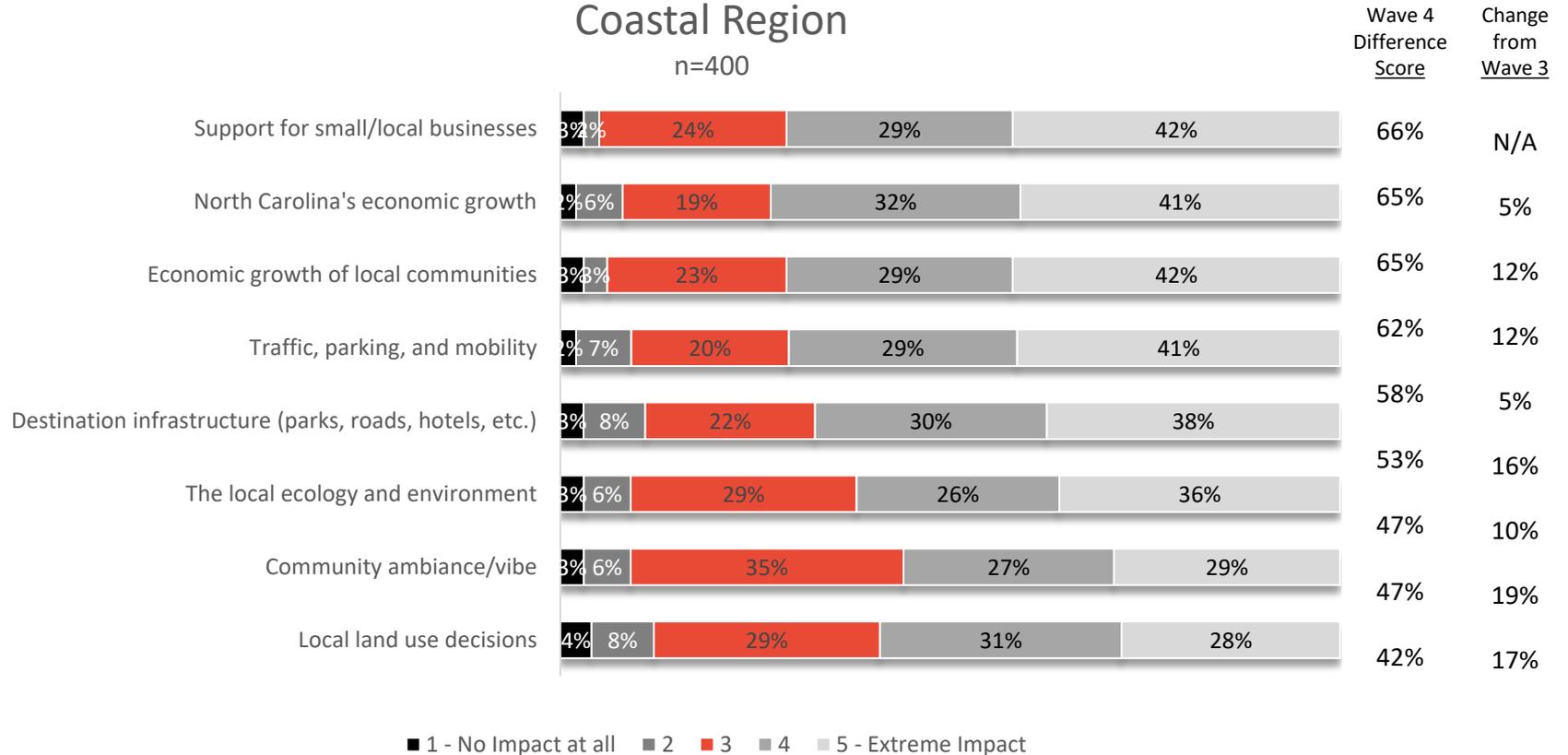
North Carolina Difference Scores (%)

	<5 Years n=154	5-10 Years n=161	11-20 Years n=194	20+ Years n=303	Born in NC n=388
Support for small/local businesses (W4 only)	54	68	60	50	43
North Carolina's economic growth	34	82	44	54	47
Economic growth of local communities	42	70	50	44	44
Traffic, parking, and mobility	45	41	59	48	32
Destination infrastructure (parks, roads, hotels, etc.)	37	47	54	40	37
Community ambiance/vibe	26	46	46	27	36
The local ecology and environment	17	34	38	27	26
State land use decisions	47	38	33	11	25
Local land use decisions	16	44	39	25	21

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.

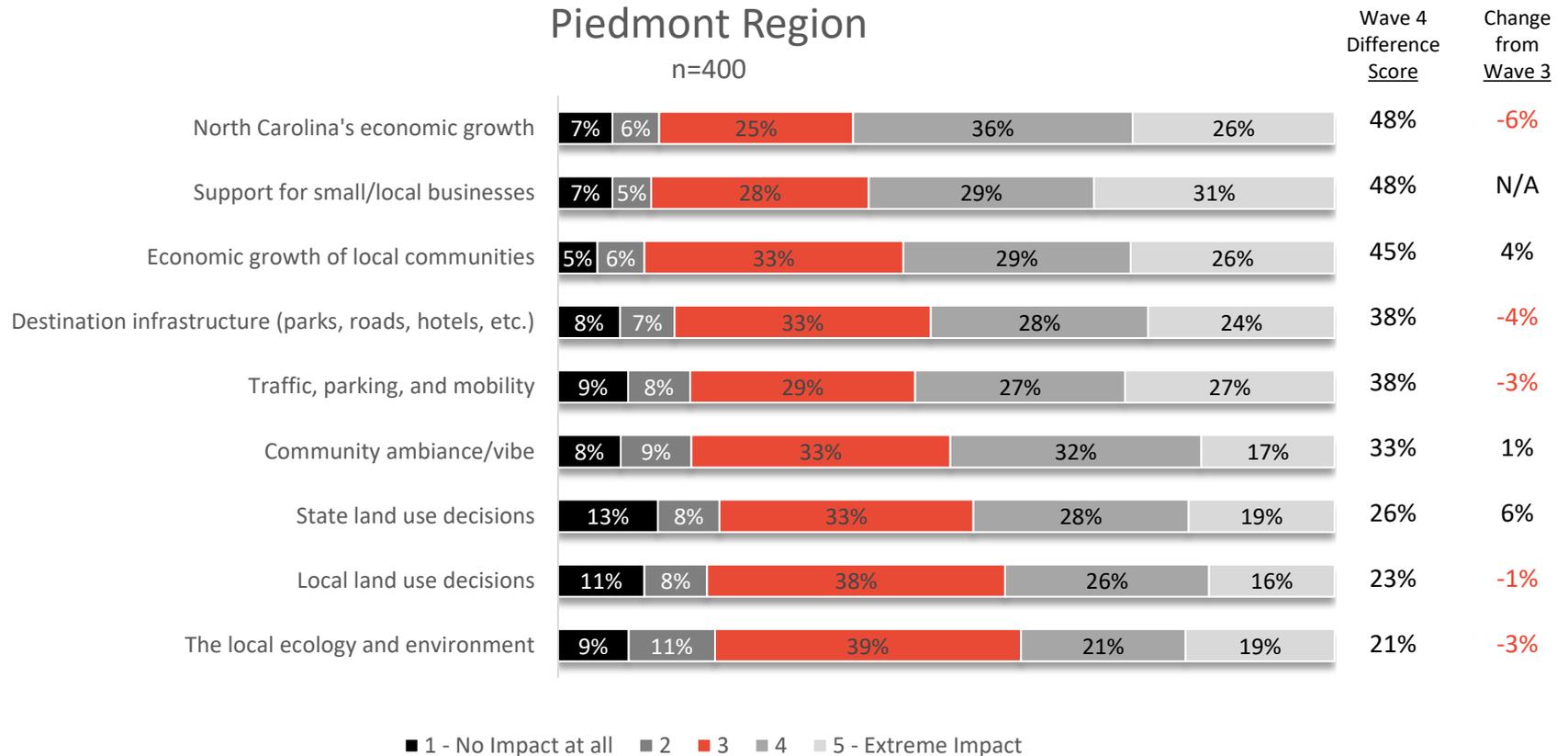
Perceived Impact of Tourism

Coastal Region n=400



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



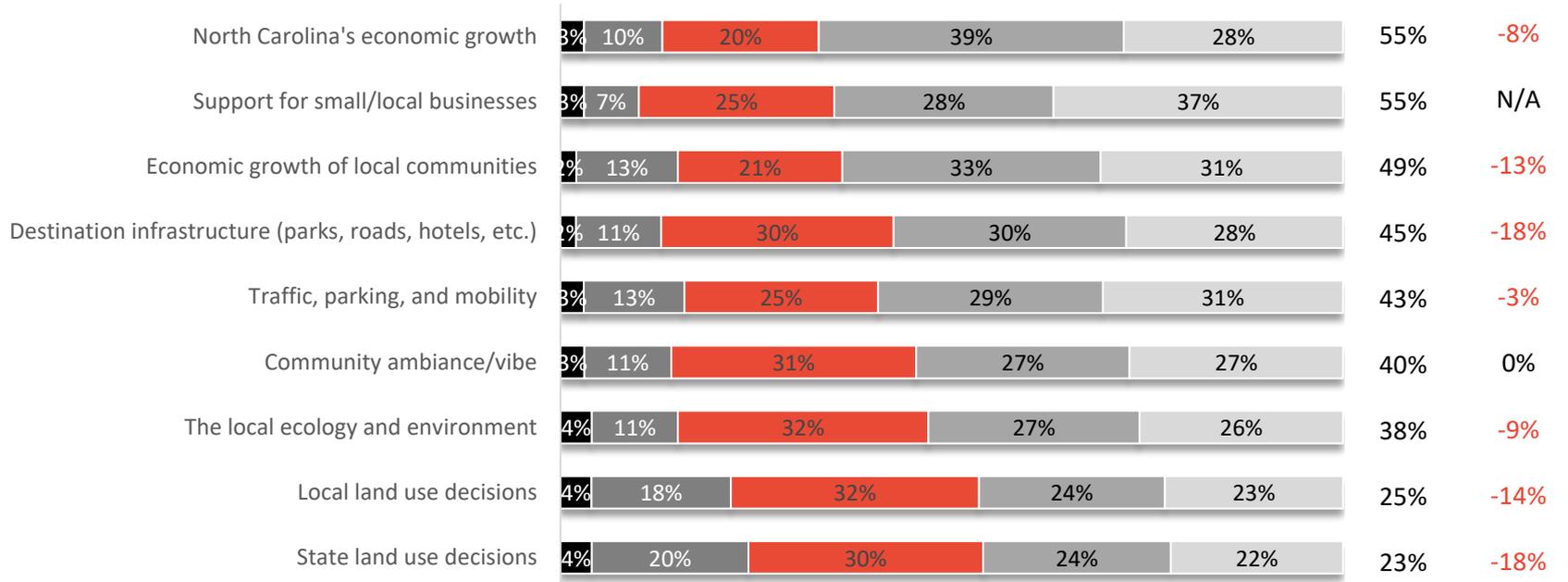
Q14: Using a scale of 1 (no impact at all) to 5 (extreme impact), please indicate how much impact you think tourism has on each of the following.

Perceived Impact of Tourism

Mountain Region

n=400

Wave 4
Difference
Score
Change
from
Wave 3



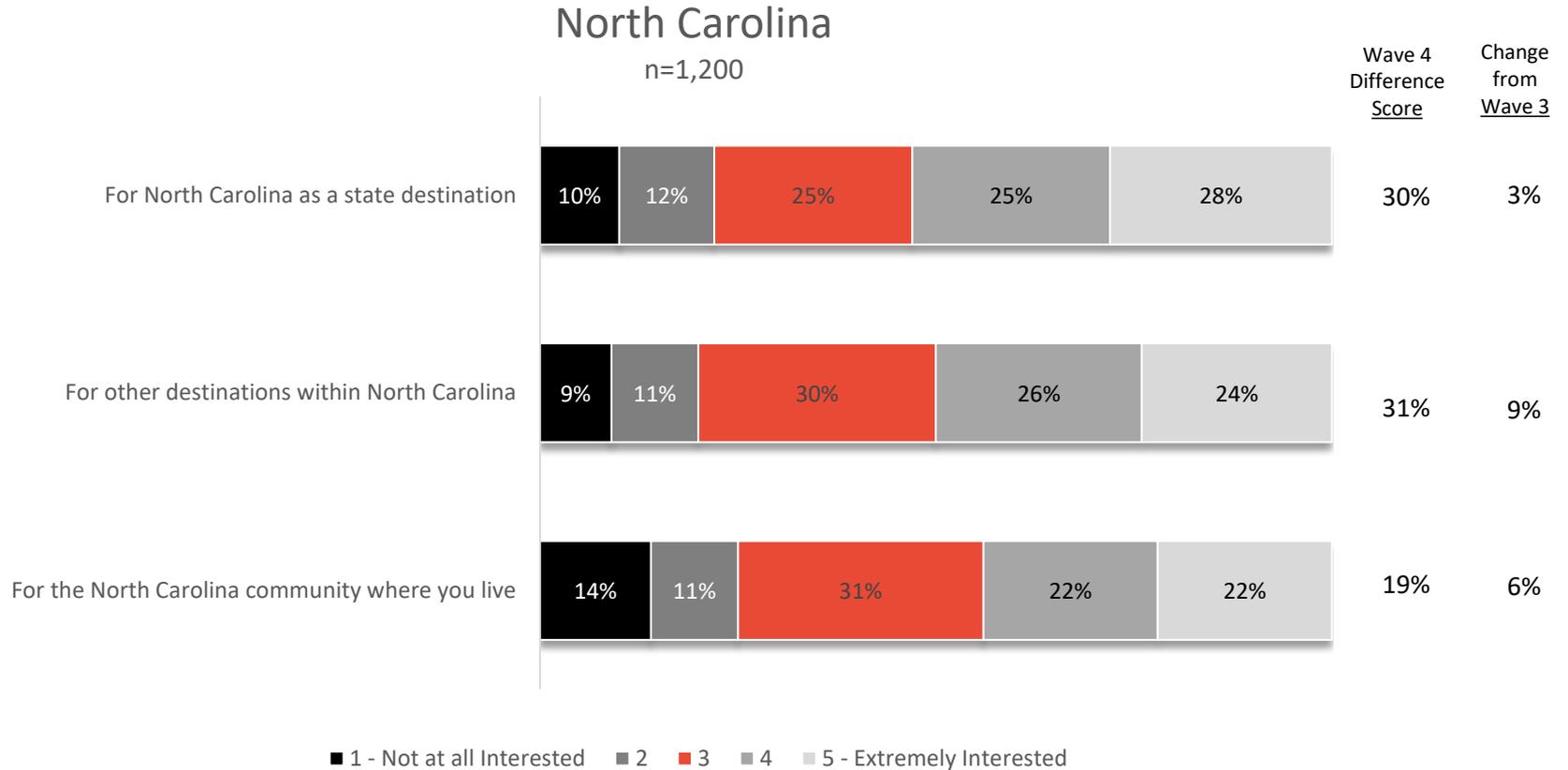
■ 1 - No Impact at all ■ 2 ■ 3 ■ 4 ■ 5 - Extreme Impact

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 North Carolina as a State Destination and for Other Destinations in the State



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 Aged 35-54 are the Most Interested in Seeing Ads for All Parts of North Carolina

North Carolina Difference Scores (%)

	18-34 n=223	35-54 n=386	55+ n=589
For North Carolina as a state destination	5	51	33
For other destinations within North Carolina	17	46	28
For the North Carolina community where you live	13	40	7

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?

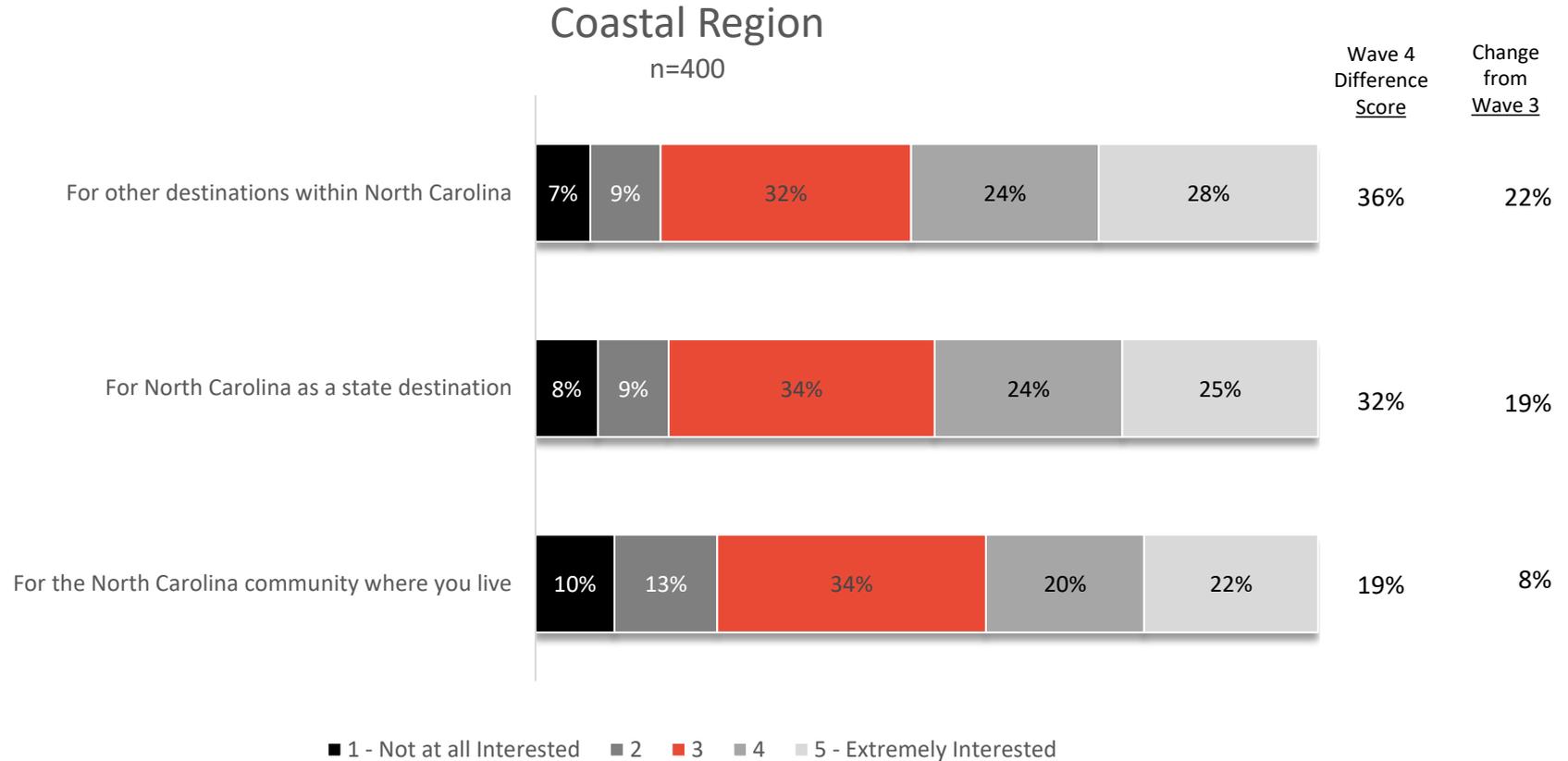
Regardless of Length of Residency, Residents are More Interested Than Not in Seeing Promotional Advertising for all Parts of North Carolina

North Carolina Difference Scores (%)

	<5 Years n=154	5-10 Years n=161	11-20 Years n=194	20+ Years n=303	Born in NC n=388
For North Carolina as a state destination	19	52	19	21	35
For other destinations within North Carolina	39	41	21	17	34
For the North Carolina community where you live	26	44	8	6	18

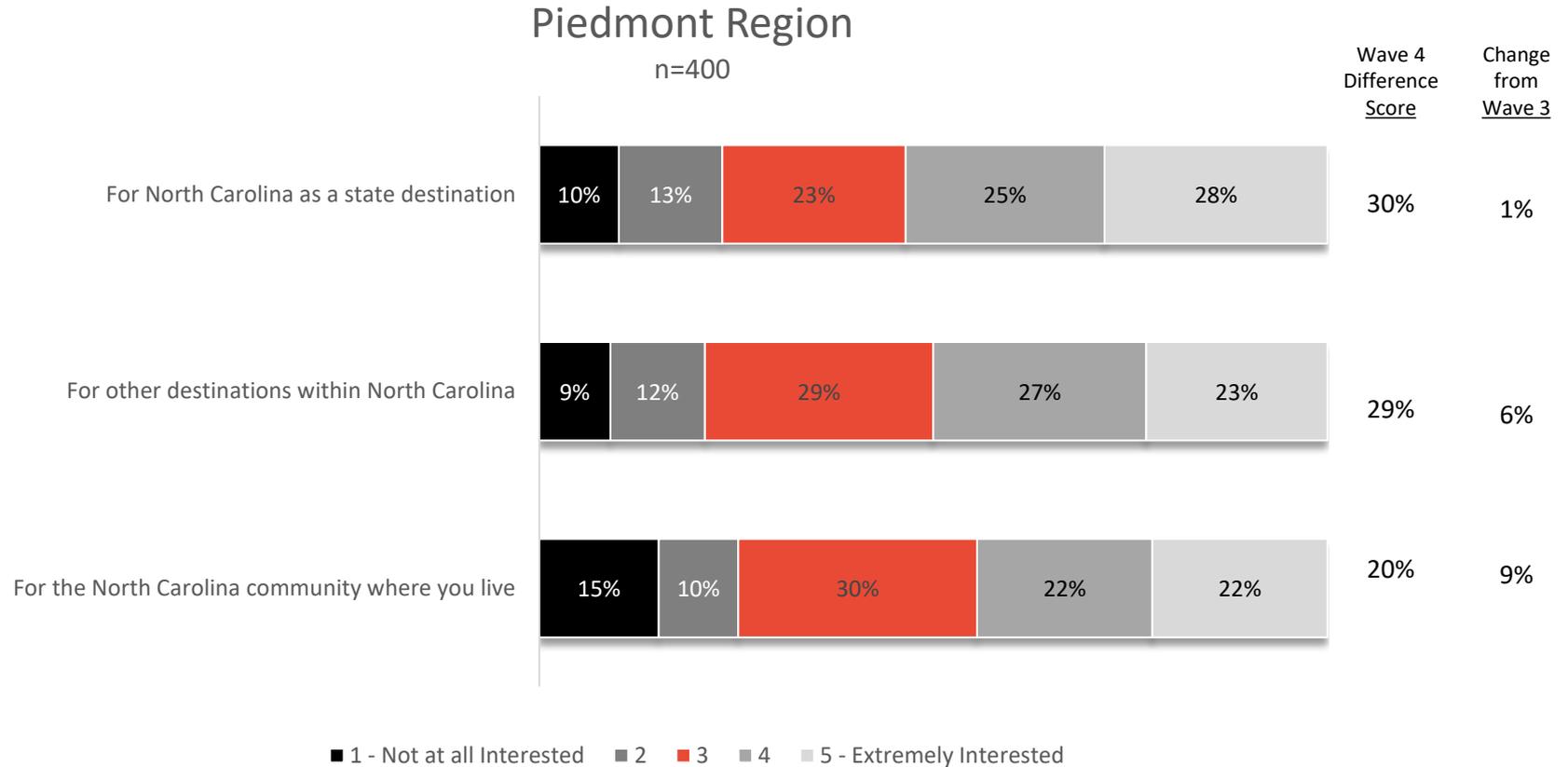
Q15: Using a scale of 1 (not at all interested) to 5 (extremely interested), how interested are you to see promotional advertising for North Carolina as a destination or other destinations within North Carolina?

Interest in Seeing Promotional Advertising



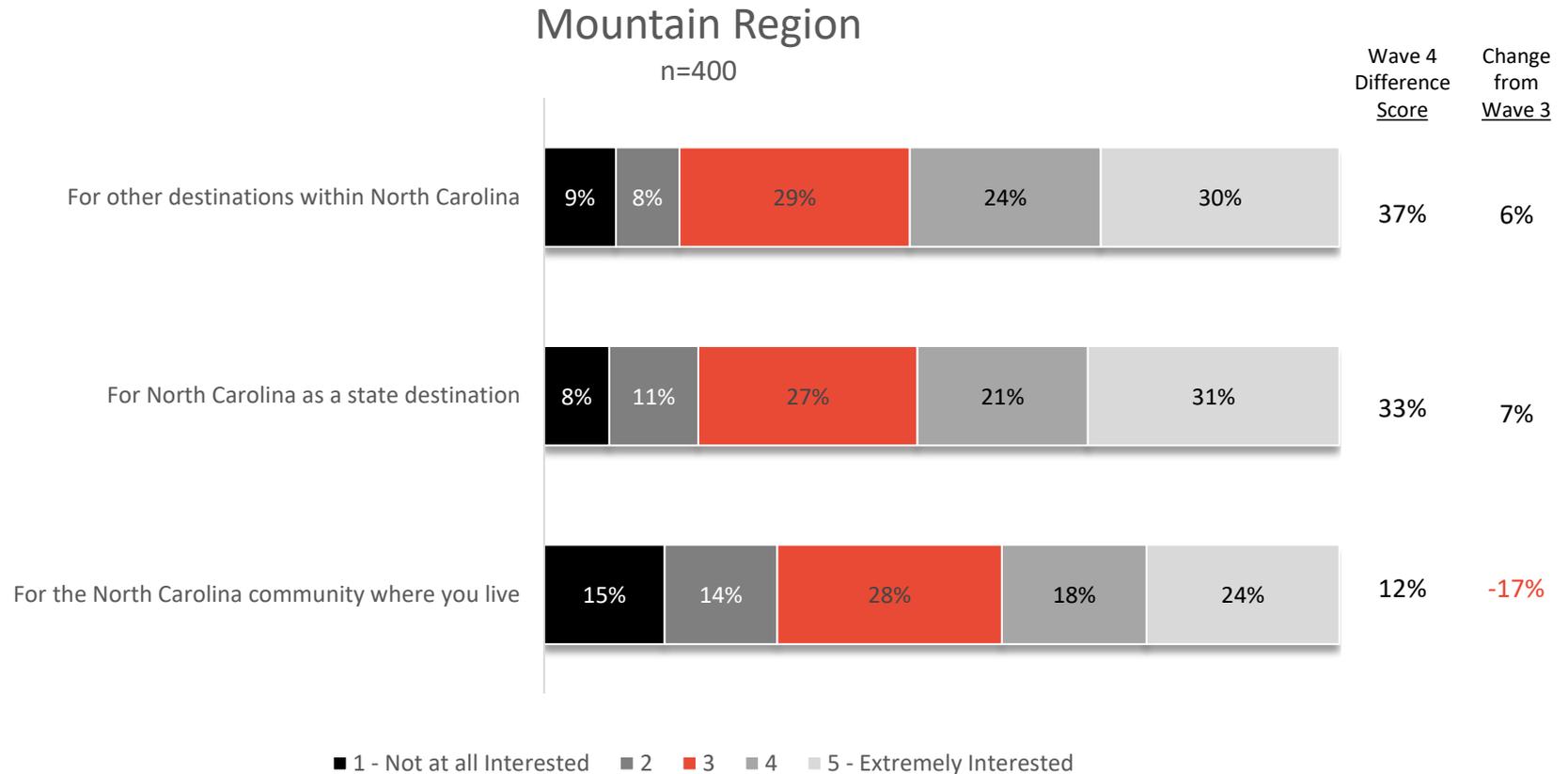
Q15: Using a scale of 1 (not at all interested) to 5 (extremely interested), how interested are you to see promotional advertising for North Carolina as a destination or other destinations within North Carolina?

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?

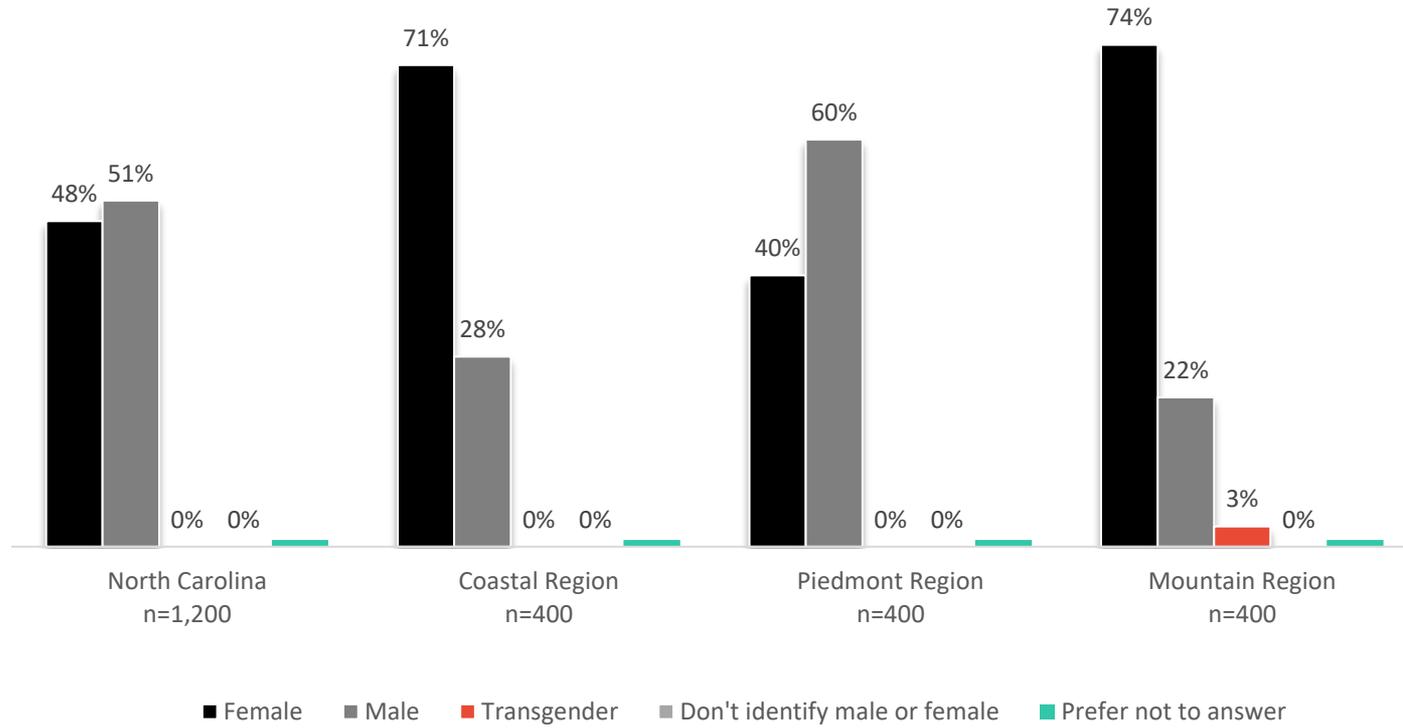
Interest in Seeing Promotional Advertising



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?

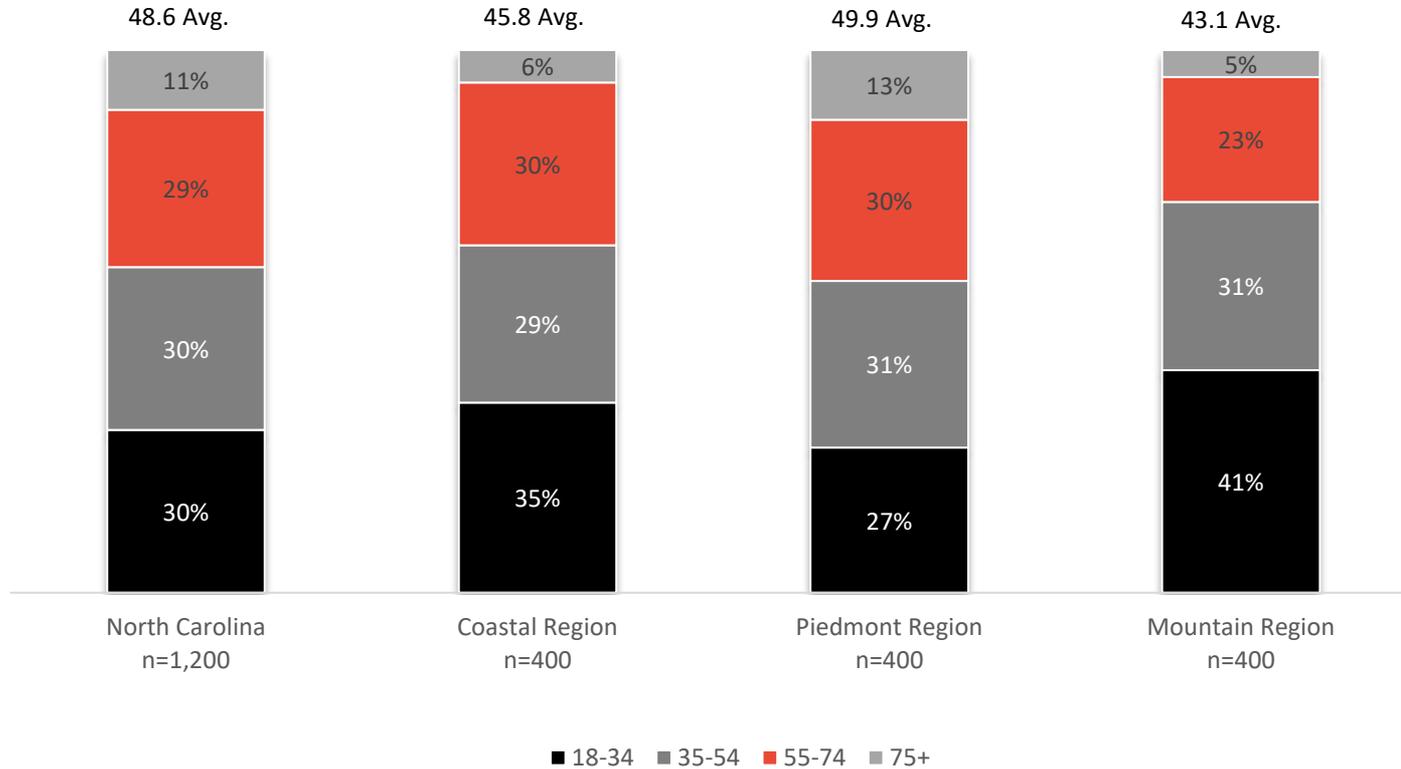
Demographics

Gender



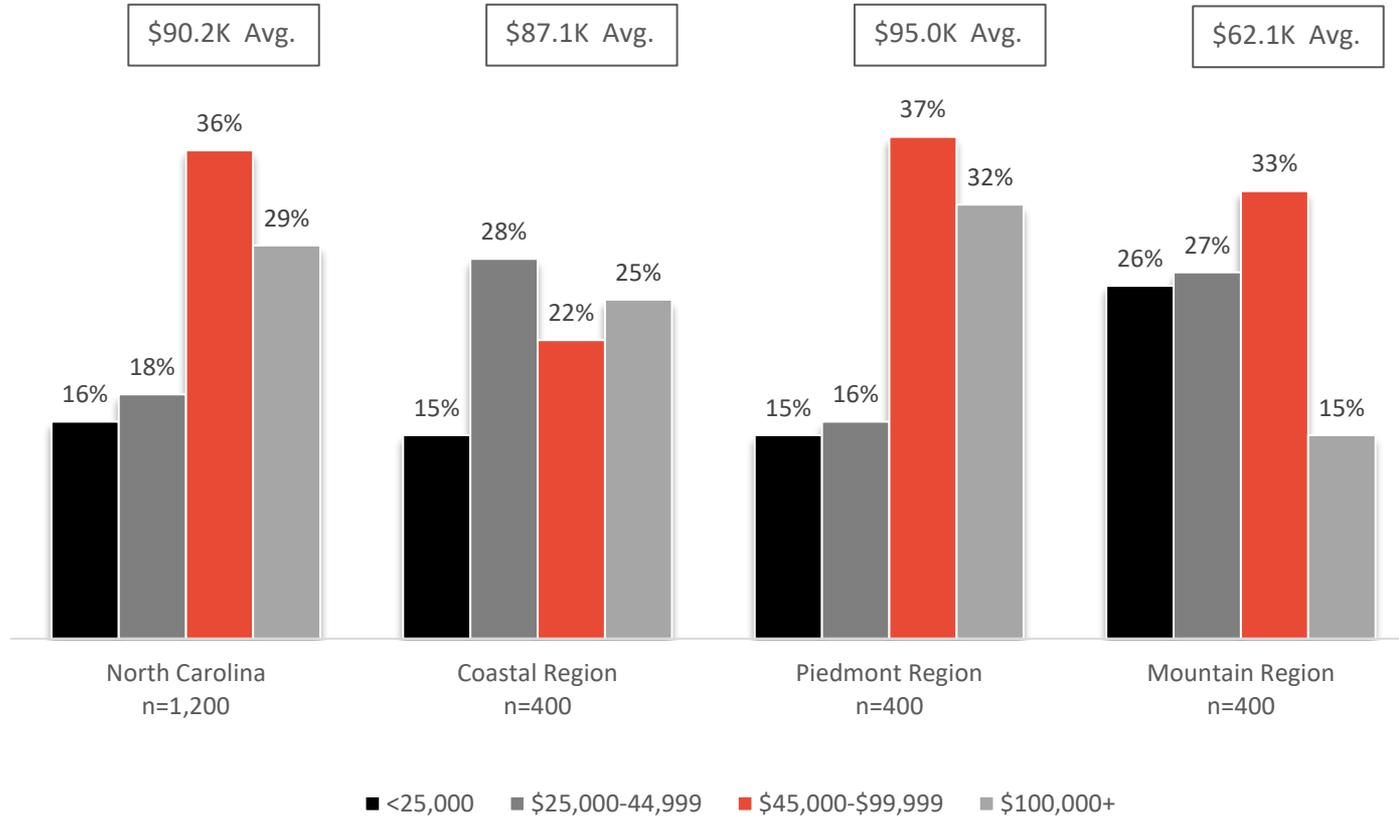
Q: How do you identify yourself?

Age



Q: Which of the following categories includes your age?

Household Income

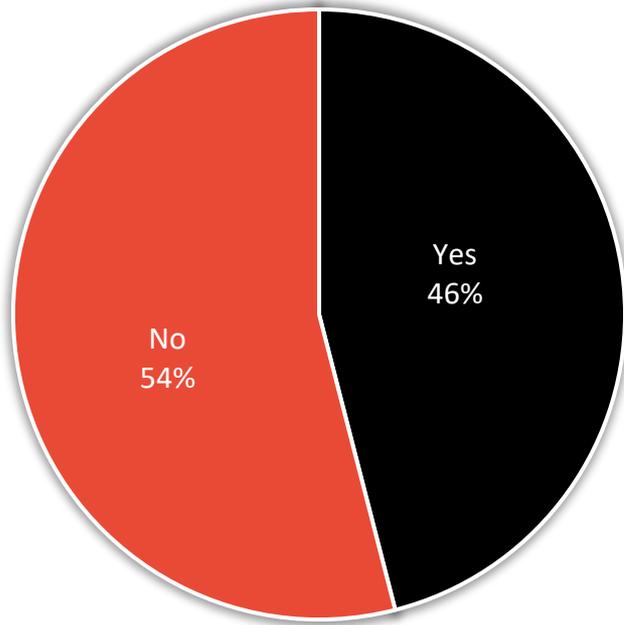


Q: What is your annual household income?

Children in Household

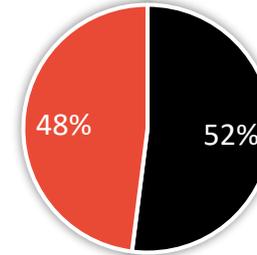
North Carolina

N=1,200



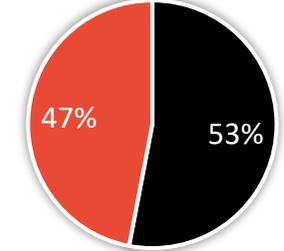
Coastal Region

n=400



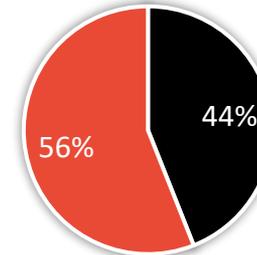
Mountain Region

n=400



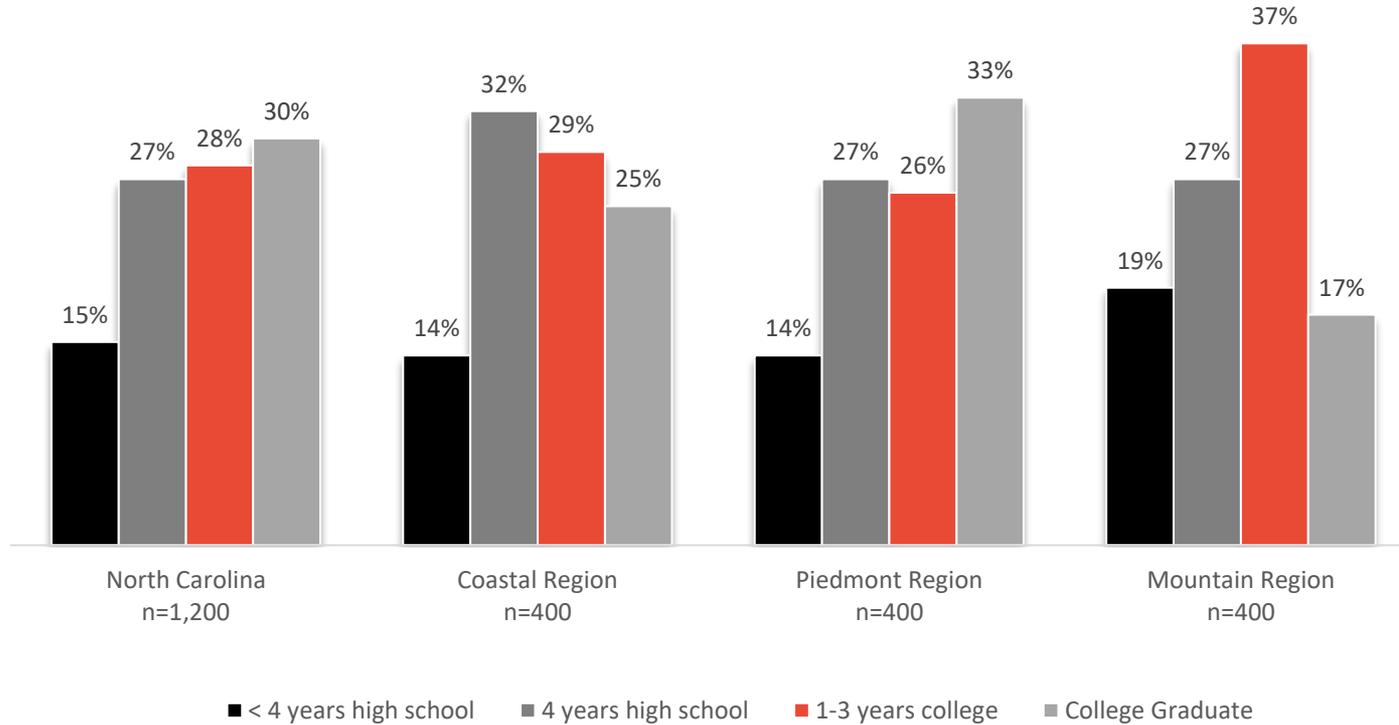
Piedmont Region

n=400



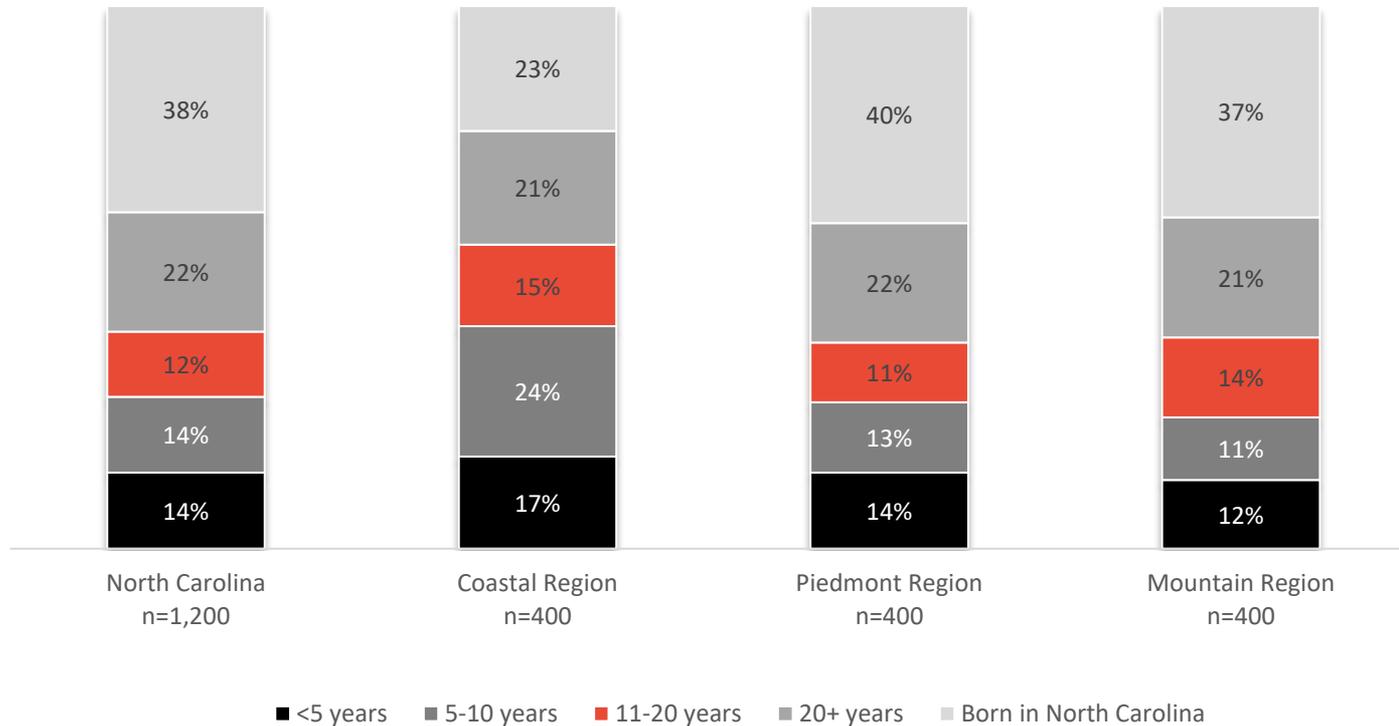
Q: Do you currently have children 18 years of age or younger living in your household?

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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Cheryl Schutz

VP, Travel Intelligence

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