

# 2023 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 a research company OmniTrak Group, Inc. for data on North Carolina visitors through its TravelTrakAmerica product.
- Each month, TravelTrakAmerica research program conducts over 9,000 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 3,000-4,000 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 the U.S. 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 the data provided by 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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## 2023 COASTAL VISITOR SUMMARY

- Ninety-one percent of all Coastal Region overnight visitors traveled for leisure purposes, while four percent came to conduct business.
- The majority of overnight travelers to the coast in 2023 visited during the summer followed by fall.
- The party size for the average Coastal Region visitor party was 3.0 in 2023. 39 percent of travel parties included children under the age of 18.
- The average Coastal Region overnight visitor party trip expenditure was \$1,608 in 2023. In-state overnight travelers spent on average \$860 and out-of-state overnight visitors spent \$2002.
- The top states of origin for overnight visitors to the Coastal Region in 2023 were NC, VA, PA, MD, GA, NJ, OH, NY.

# 2023 MOUNTAIN VISITOR SUMMARY

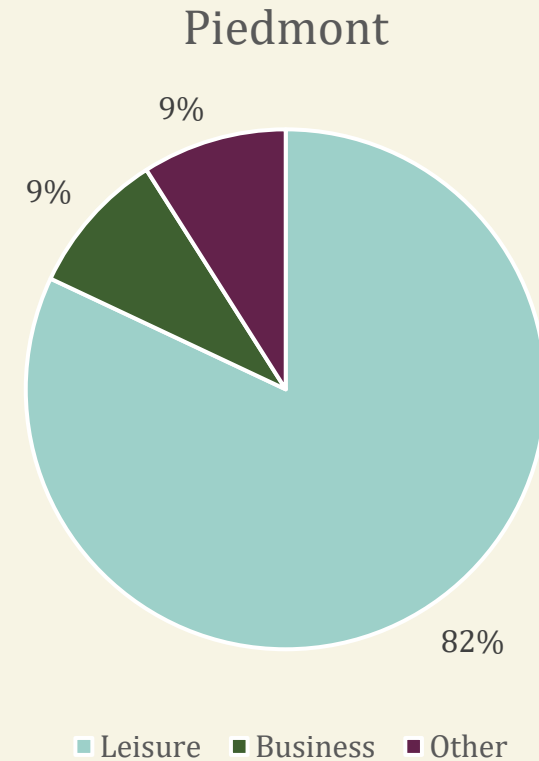
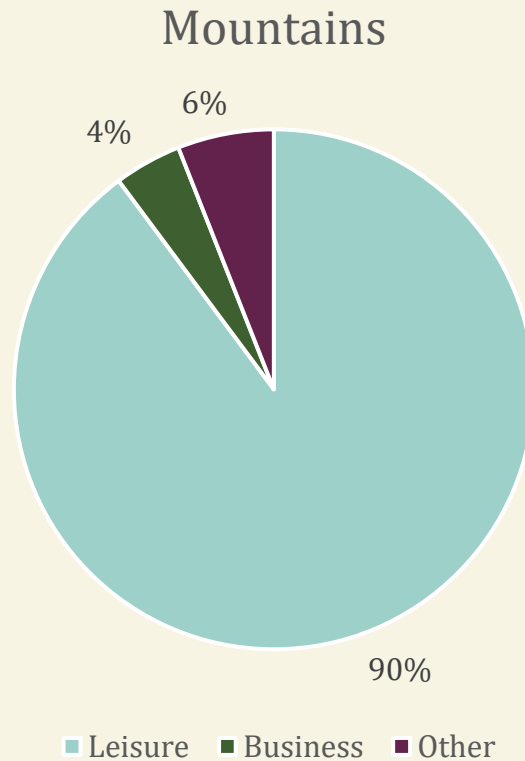
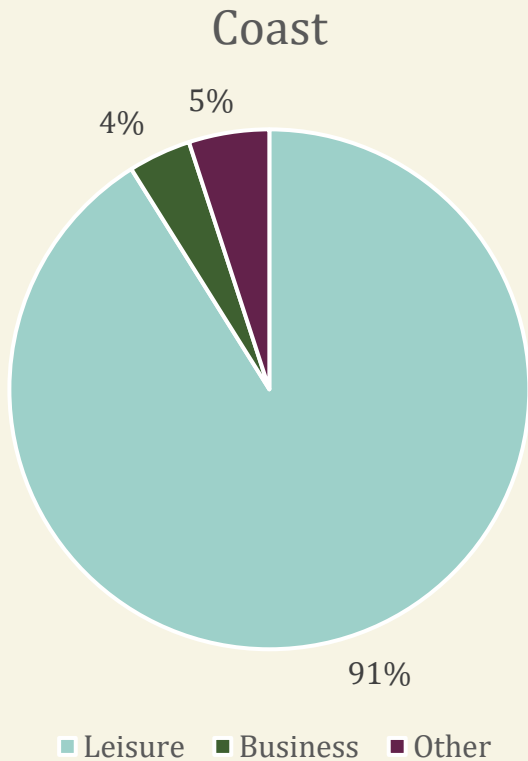
- Ninety percent of all Mountain Region overnight visitors traveled for leisure purposes, while four percent came to conduct business.
- The majority of overnight travelers to the mountains in 2023 visited during the summer followed by fall and spring.
- The party size for the average Mountain Region visitor party was 2.6 in 2023. 31 percent of travel parties included children under the age of 18.
- The average Mountain Region overnight visitor party trip expenditure was \$984 in 2023. In-state overnight travelers spent on average \$691 and out-of-state overnight visitors spent \$1129.
- The top states of origin for overnight visitors to the Mountain Region in 2023 were NC, SC, GA, FL, TN, TX, KY, NY.

# 2023 PIEDMONT VISITOR SUMMARY

- Eighty-two percent of all Piedmont Region overnight visitors traveled for leisure purposes, while nine percent came to conduct business.
- The majority of overnight travelers to the piedmont in 2023 visited during the fall followed by winter and summer.
- The party size for the average Piedmont Region visitor party was 2.4 in 2023. 31 percent of travel parties included children under the age of 18.
- The average Piedmont Region overnight visitor party trip expenditure was \$890 in 2023. In-state overnight travelers spent on average \$355 and out-of-state overnight visitors spent \$1,130.
- The top states of origin for overnight visitors to the Piedmont Region in 2023 were NC, SC, VA, NY, FL, GA, NJ, PA.

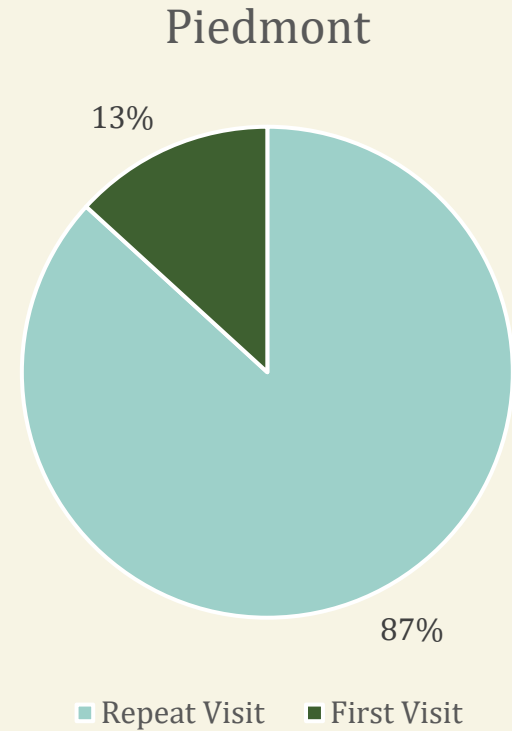
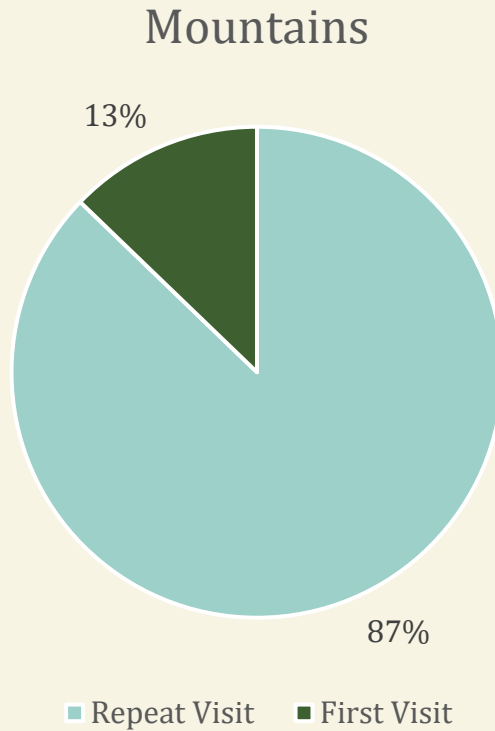
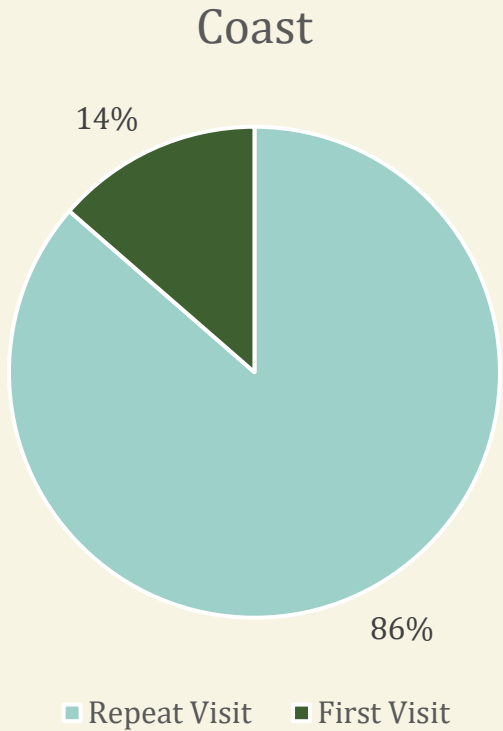
# MAIN PURPOSE OF VISIT TO OVERNIGHT VISITORS TO NORTH CAROLINA REGIONS

- Leisure is by far the top primary purpose of visit for each region of the state.
- 59 percent of business travelers to the Coastal Region say that they extended their business trip for leisure in 2023, while 32 percent of piedmont visitors and 48 percent of mountain visitors extended their stays.



# FIRST VISIT TO NORTH CAROLINA FOR OVERNIGHT VISITORS

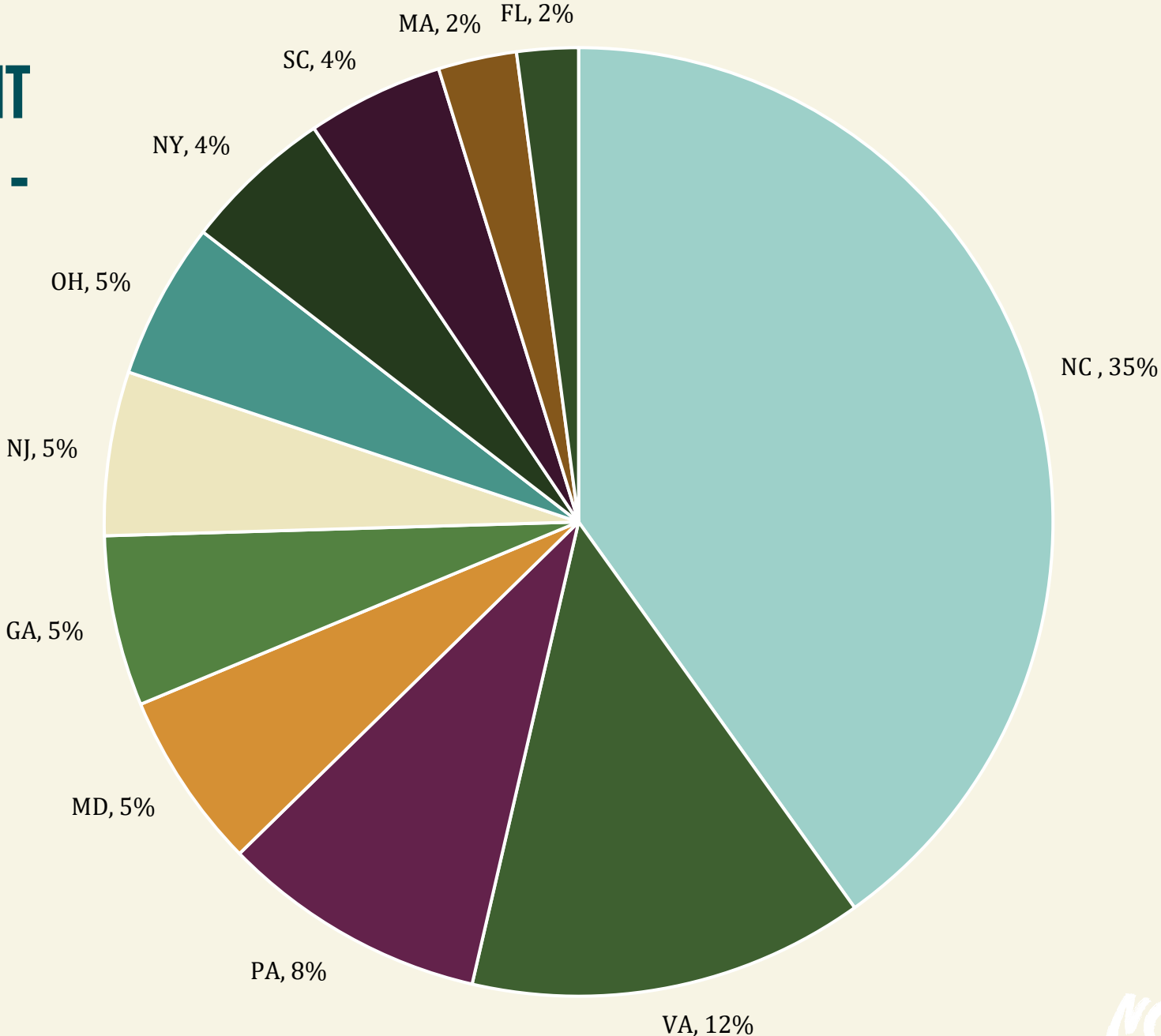
- All three regions welcomed similar proportion of first-time North Carolina visitors in 2023, while the majority of visitors are repeat visitors to the state.





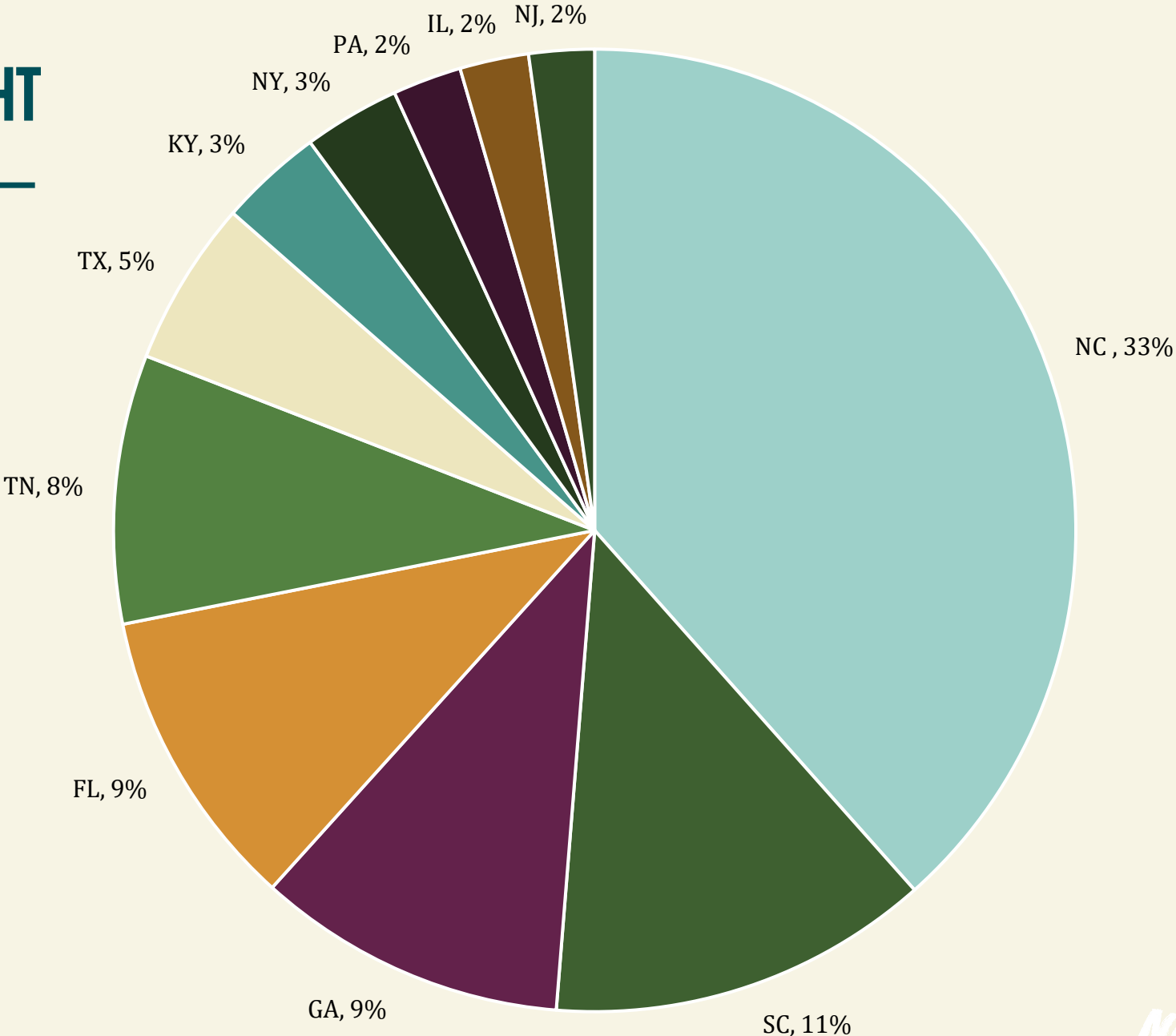
# STATE OF ORIGIN OF OVERNIGHT VISITORS TO NORTH CAROLINA - COASTAL REGION

- 35 percent of overnight visitors to the coast in 2023 were in-state residents.
- The next ten states represented 52 percent of overnight visitors to the coastal region.



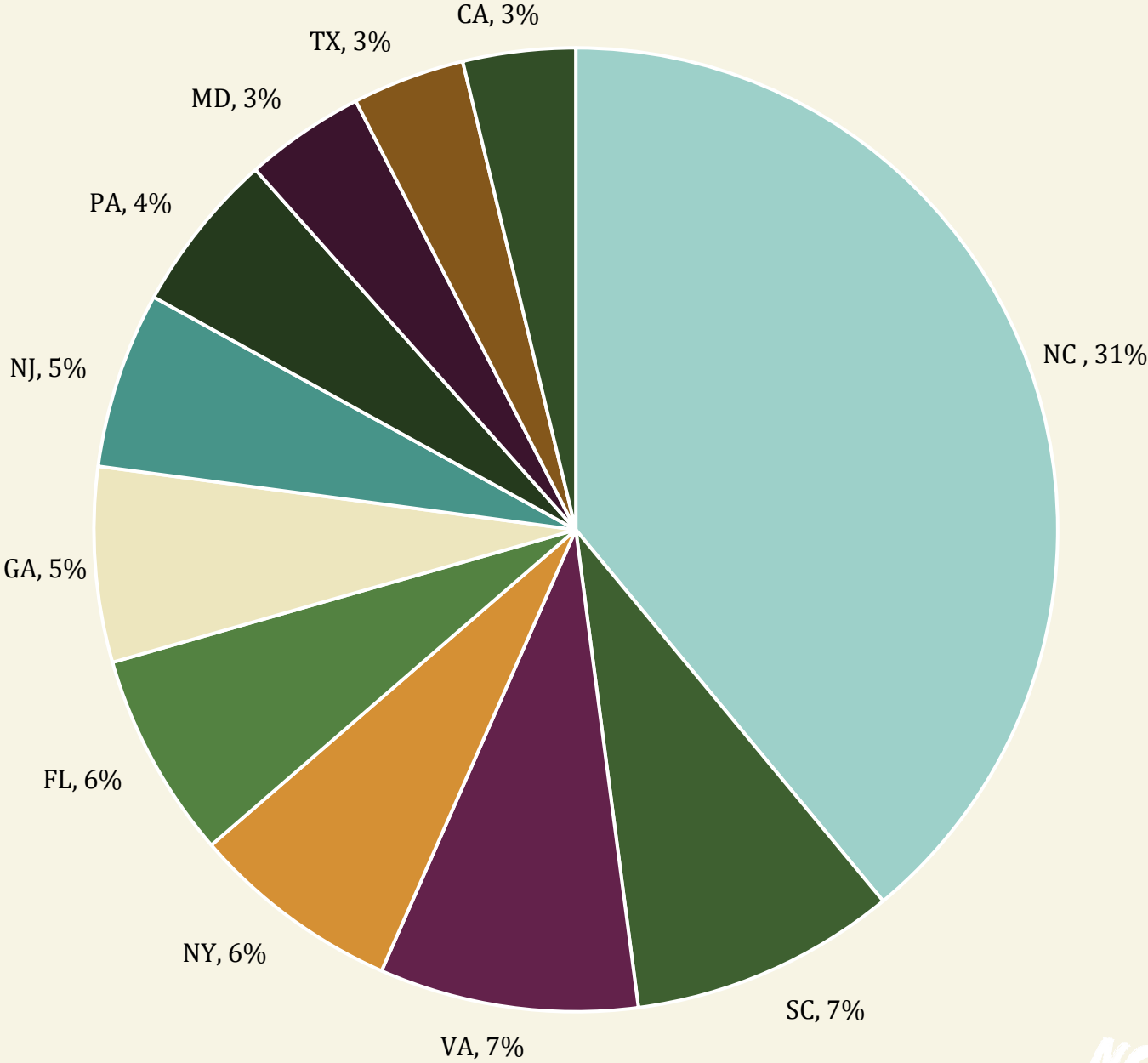
# STATE OF ORIGIN OF OVERNIGHT VISITORS TO NORTH CAROLINA — MOUNTAIN REGION

- 33 percent of overnight visitors to the mountains in 2023 were in-state residents.
- The next ten states represented 53 percent of overnight visitors to the mountain region.



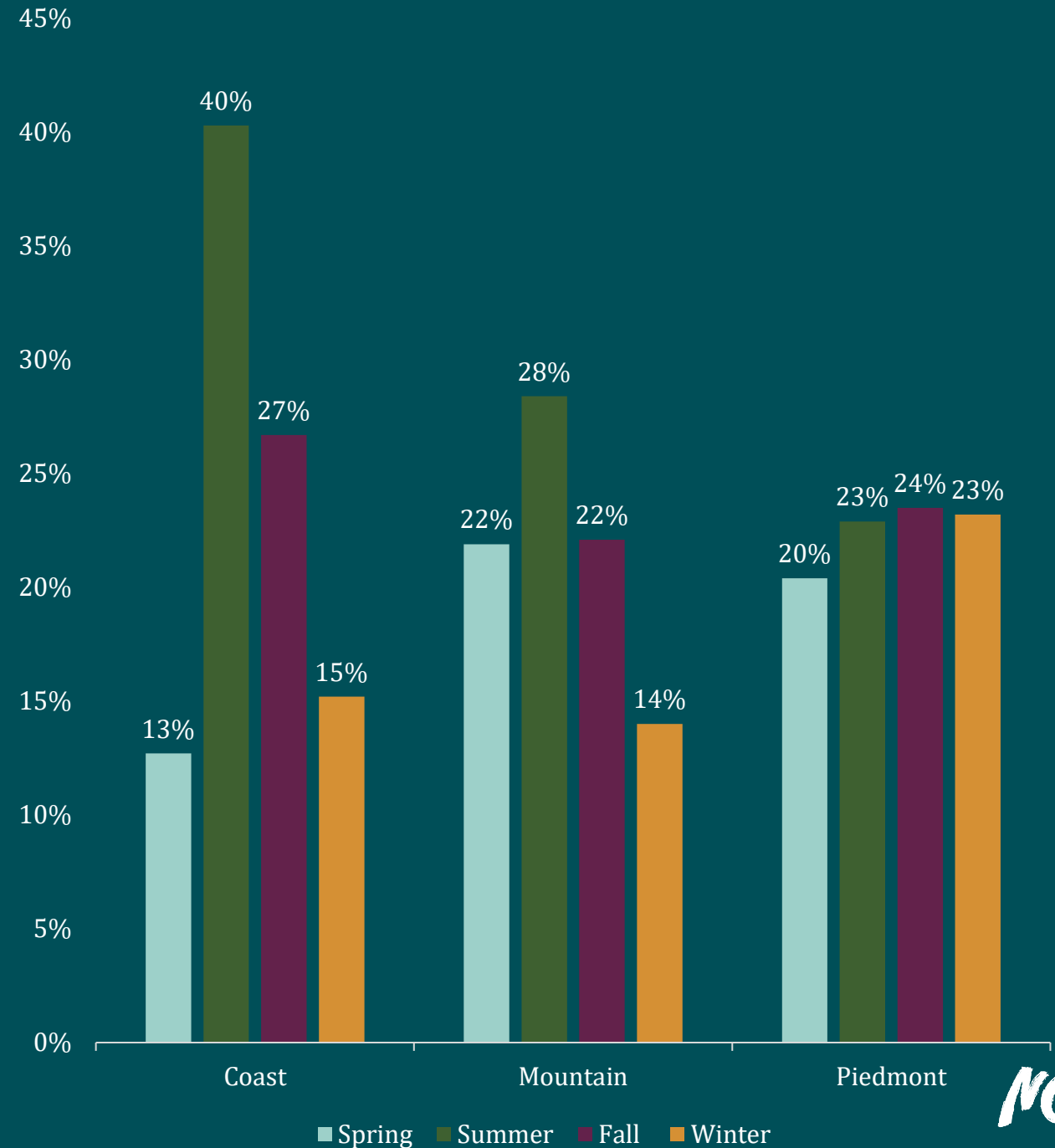
# STATE OF ORIGIN OF OVERNIGHT VISITORS TO NORTH CAROLINA — PIEDMONT REGION

- 31 percent of overnight visitors to the piedmont in 2023 were in-state residents.
- The next ten states represented 49 percent of overnight visitors to the piedmont region.



# SEASON OF VISIT

- The summer season was the most popular for overnight visitors to the coast and mountains in 2023.
- The fall was the most popular for overnight visitors to the piedmont closely followed by winter and summer in 2023.



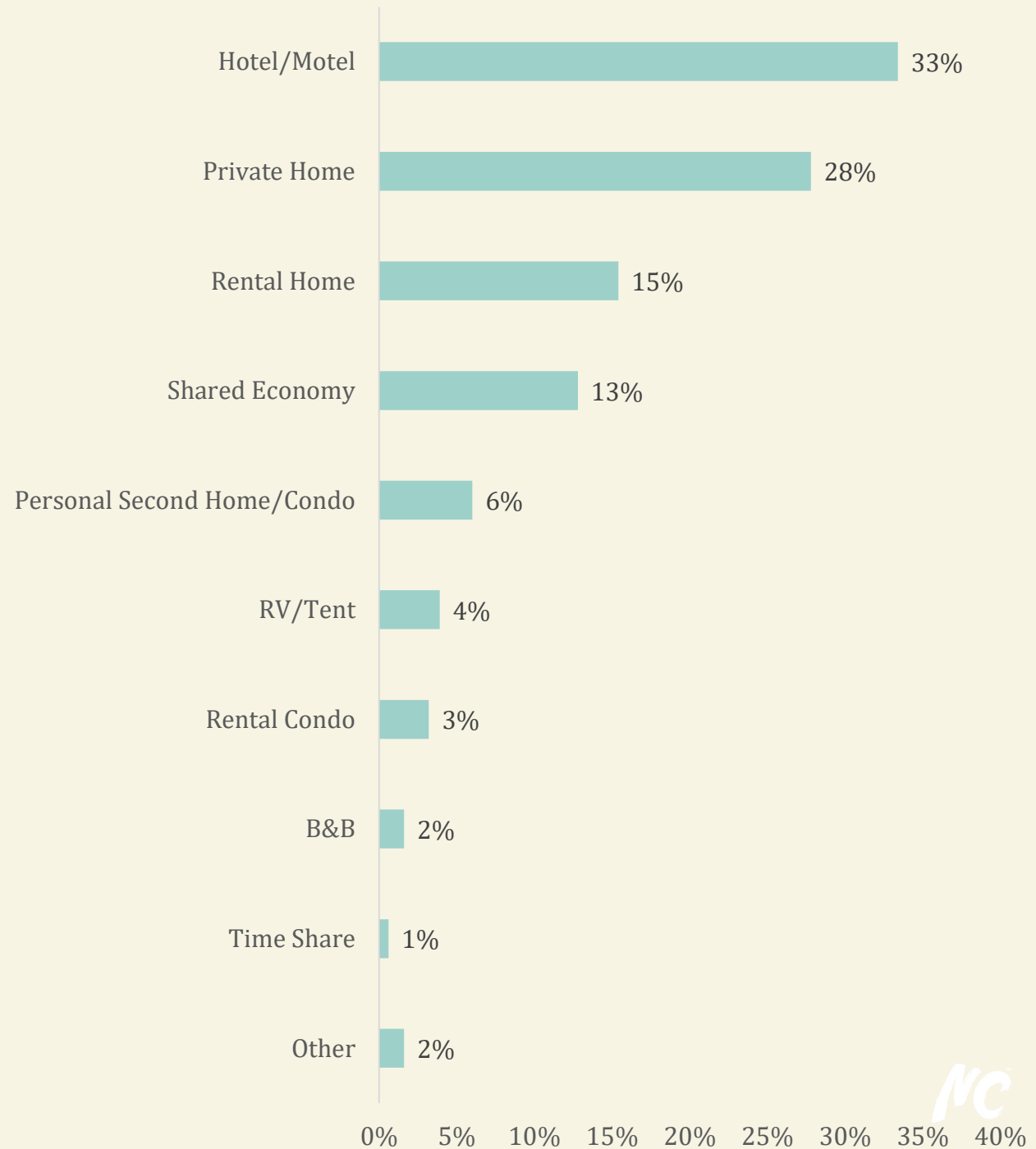
# AVERAGE LENGTH OF STAY FOR NORTH CAROLINA OVERNIGHT VISITORS

- Coastal Region- 4.3 nights
- Mountain Region -3.3 nights
- Piedmont Region- 3.1 nights



# ACCOMMODATIONS USED IN COASTAL REGION

- Coastal Region visitors were more likely to stay in a hotel/motel or private home while in the state, followed closely by rental homes and shared economy rentals.
- Approximately 6 percent of overnight visitors to the coast reported a stay in a personal second home/condo.

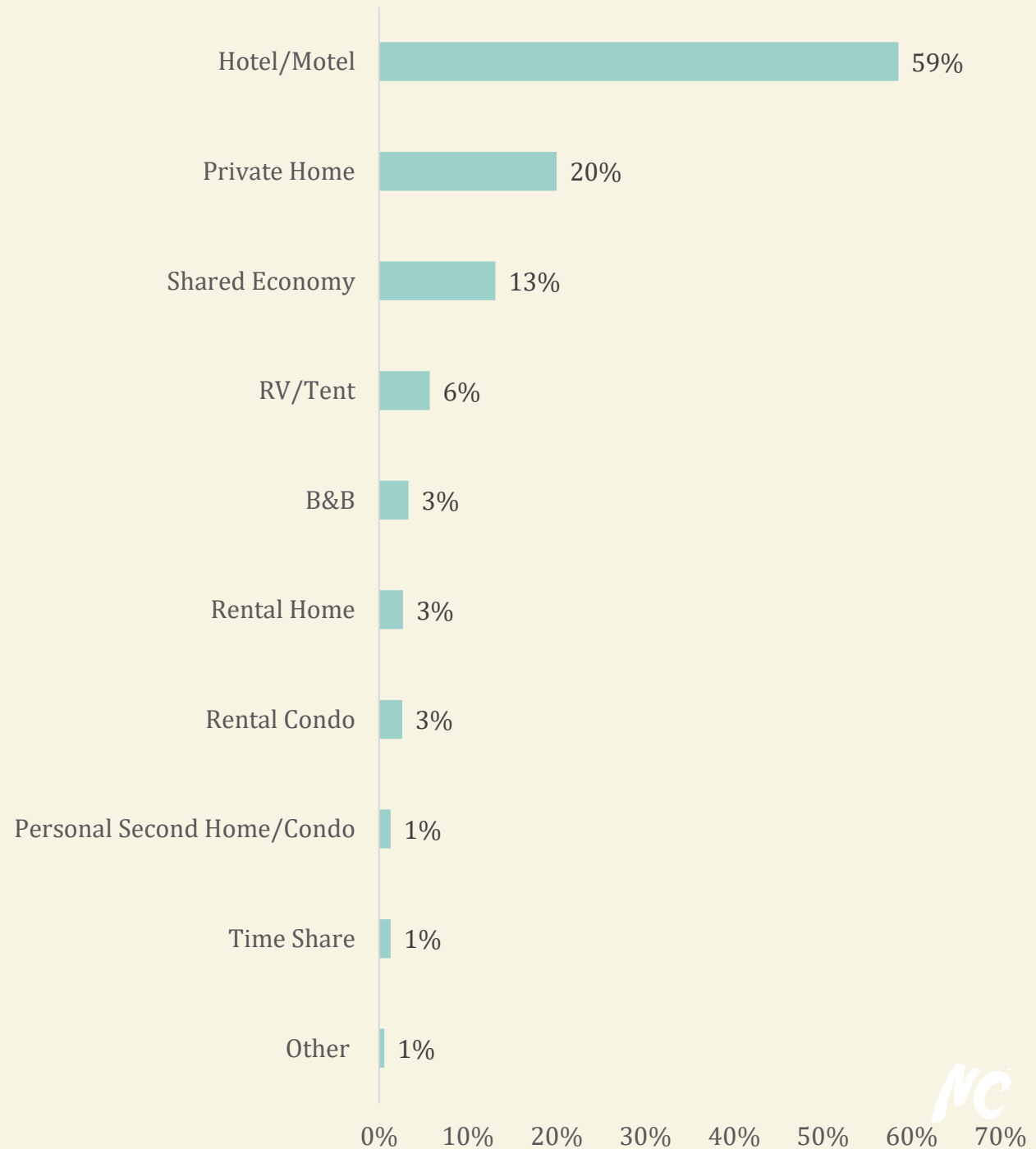


\* Multiple responses allowed; thus, percentages do not add to 100%



# ACCOMMODATIONS USED IN MOUNTAIN REGION

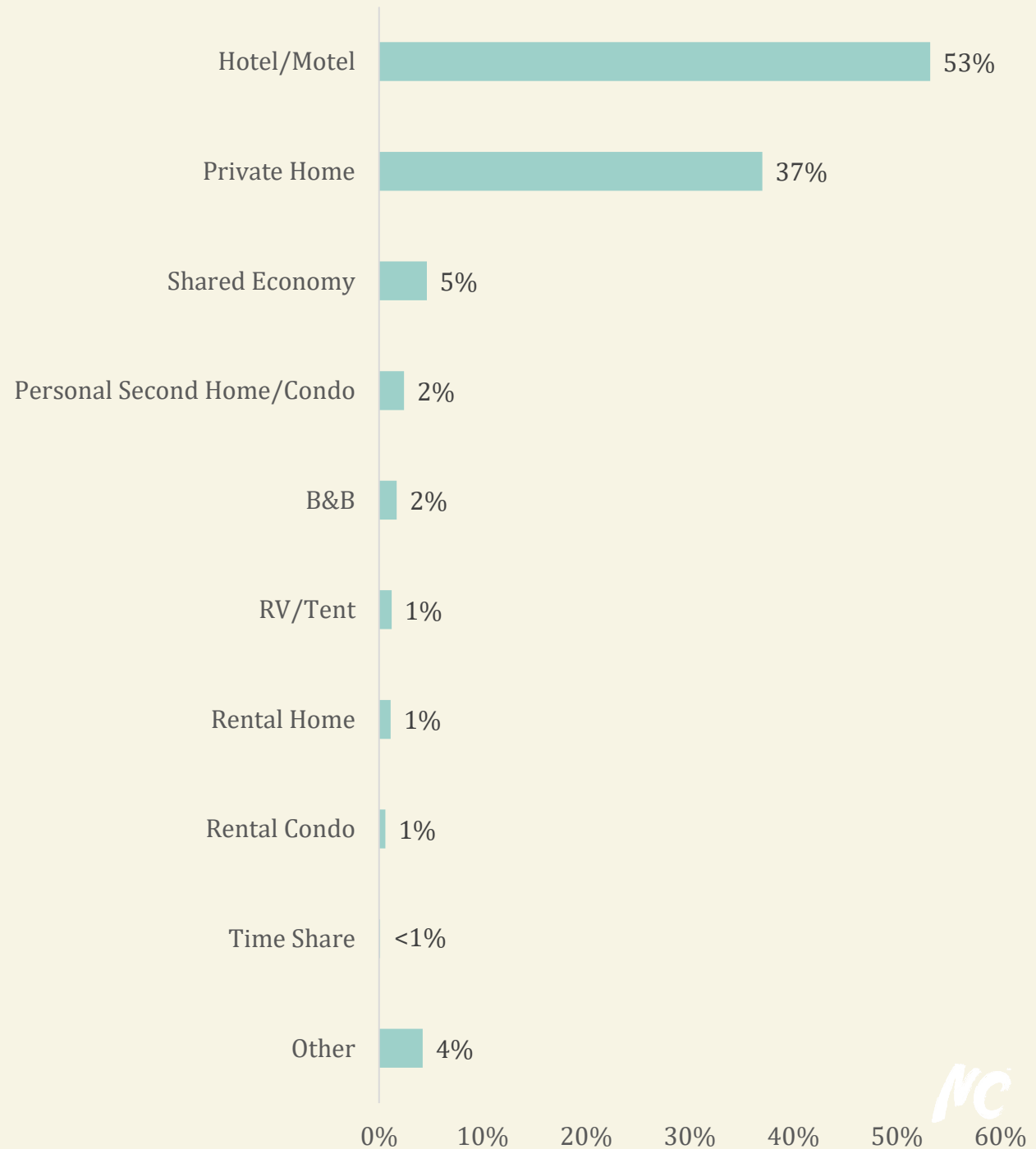
- Mountain Region visitors were more likely to stay in a hotel/motel or private home while in the state, followed closely by shared economy and RV/Tent.
- Approximately 3 percent of overnight visitors to the mountains reported a stay in a bed and breakfast.



\* Multiple responses allowed; thus, percentages do not add to 100%

# ACCOMMODATIONS USED IN PIEDMONT REGION

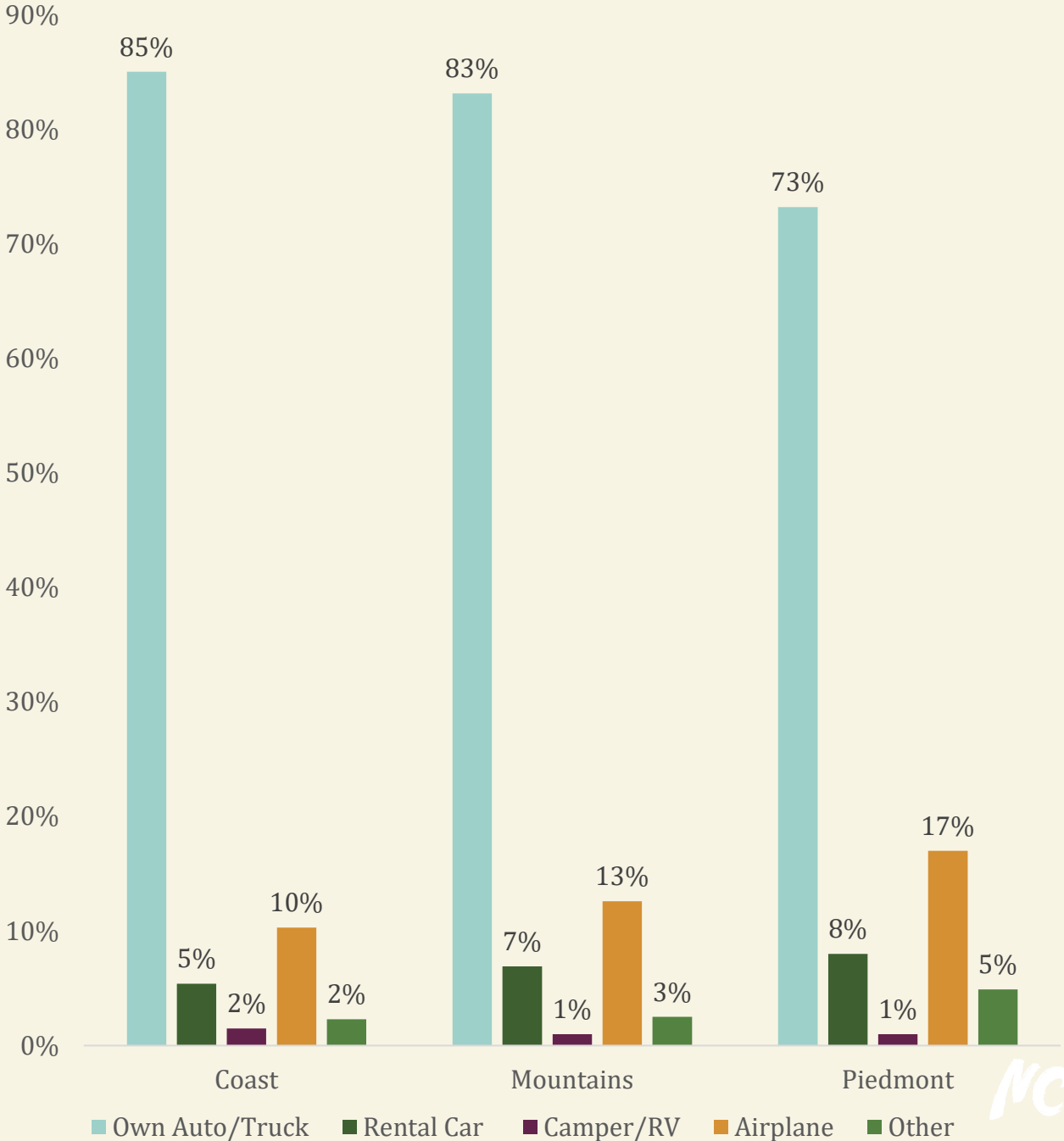
- Piedmont Region visitors were more likely to stay in a hotel/motel or private home while in the state, followed closely by shared economy rentals.
- Approximately 2 percent of overnight visitors to the piedmont reported a stay in a personal second home/condo.



\* Multiple responses allowed; thus, percentages do not add to 100%

# TRANSPORTATION USED TO TRAVEL TO NORTH CAROLINA

- Not surprisingly, the majority of overnight travelers to each region traveled to the state via automobile, primarily personal.
- Air travel was the second most popular mode of transportation for travel to North Carolina in 2023, particularly for Piedmont Region visitors.

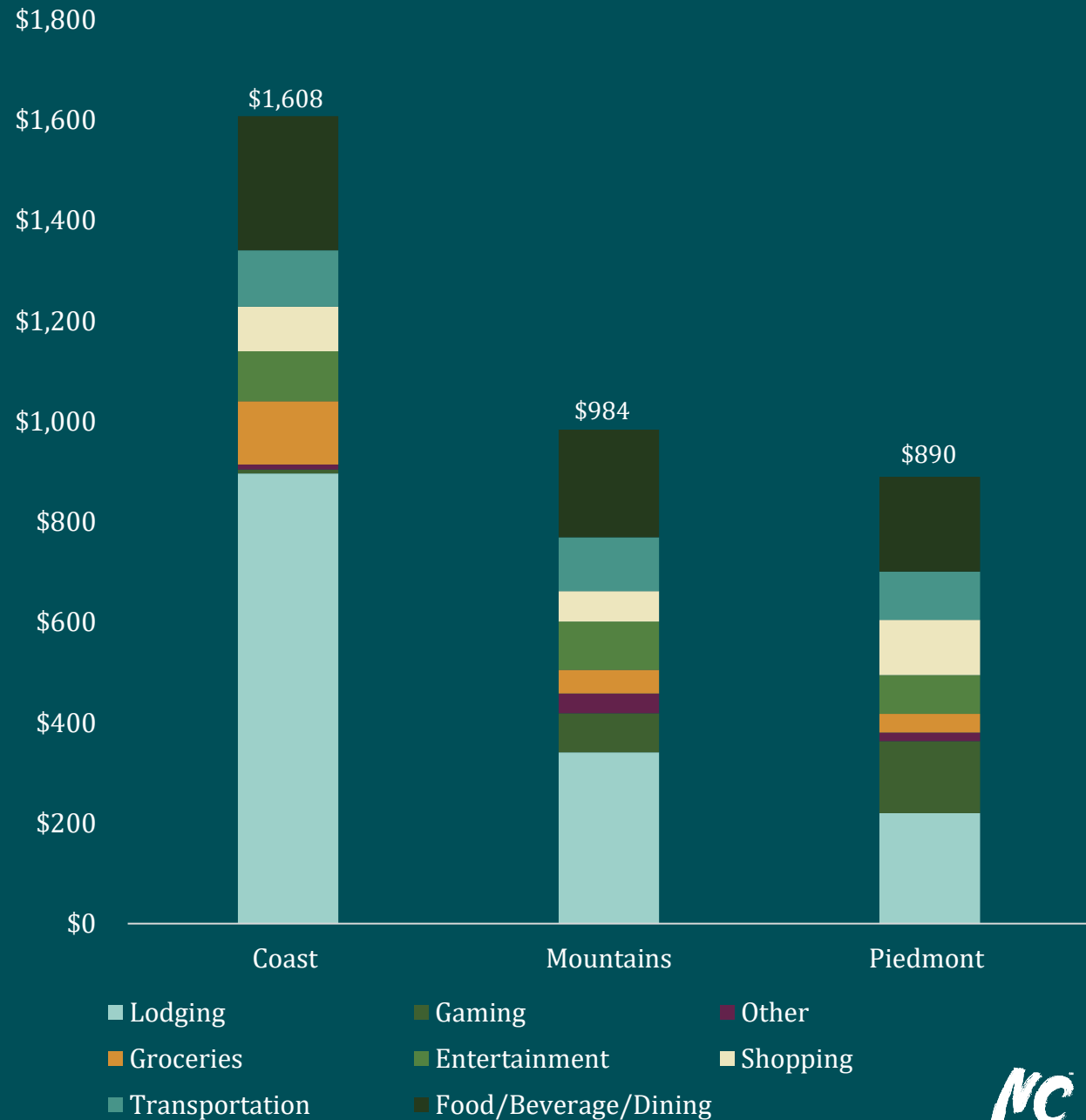


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# AVERAGE TRIP SPENDING FOR OVERNIGHT NORTH CAROLINA VISITOR PARTIES BY REGION

- Overnight visitors to the coast spent more per trip in 2023 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 2023

Coastal Region Visitor Parties	
Beach	70%
Visiting friends/relatives	35%
Shopping	34%
Historic sites	27%
Swimming	21%
Museums	17%
Fine dining	17%
Rural sightseeing	16%
Local/folk arts/crafts	16%
Wildlife viewing	15%
Fishing	14%
State park/Monuments/Recreation areas	14%
Unique local cuisine	13%
Zoos/Aquariums/Aviaries	12%
National park/Monuments/Recreation Areas	12%
Bird watching	9%
Hiking/Backpacking/Canyoneering	8%
Urban sightseeing	8%
Other nature (photography, rockhound, etc.)	8%

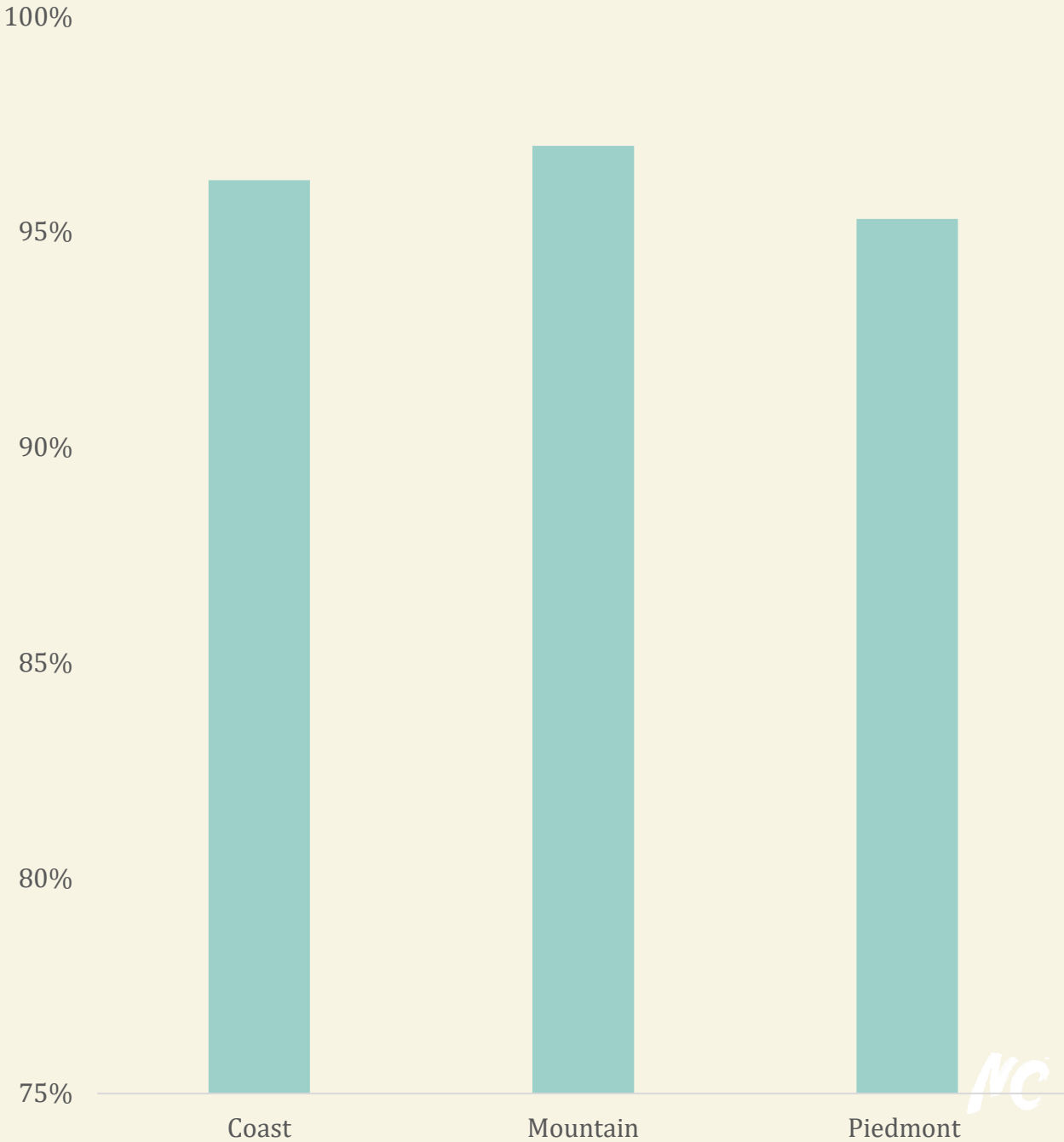
Mountain Region Visitor Parties	
Shopping	34%
Visiting friends/relatives	28%
Local/folk arts/crafts	27%
Historic sites	26%
Rural sightseeing	25%
Hiking/Backpacking/Canyoneering	24%
National park/Monuments/Recreation Areas	24%
Wildlife viewing	20%
State park/Monuments/Recreation areas	19%
Museums	17%
Fine dining	17%
Casino/Gaming	16%
Art galleries	13%
Unique local cuisine	13%
Gardens	12%
Craft breweries	12%
Native American ruins/Rock art	12%
Urban sightseeing	11%
Other nature (photography, rockhound, etc.)	10%

Piedmont Region Visitor Parties	
Visiting friends/relatives	42%
Shopping	23%
Historic sites	13%
Fine dining	11%
Museums	10%
Rural sightseeing	8%
Urban sightseeing	8%
Beach	8%
Unique local cuisine	8%
Craft breweries	8%
Local/folk arts/crafts	7%
Hiking/Backpacking/Canyoneering	7%
Gardens	7%
Swimming	6%
State park/Monuments/Recreation areas	5%
Art galleries	2%
Wildlife viewing	5%
Fishing	4%
Nightclubs/Dancing	4%



# SATISFACTION WITH VISIT TO NORTH CAROLINA REGIONS

- All visitors to and within each region reported high satisfactions rates with their visits in 2023.

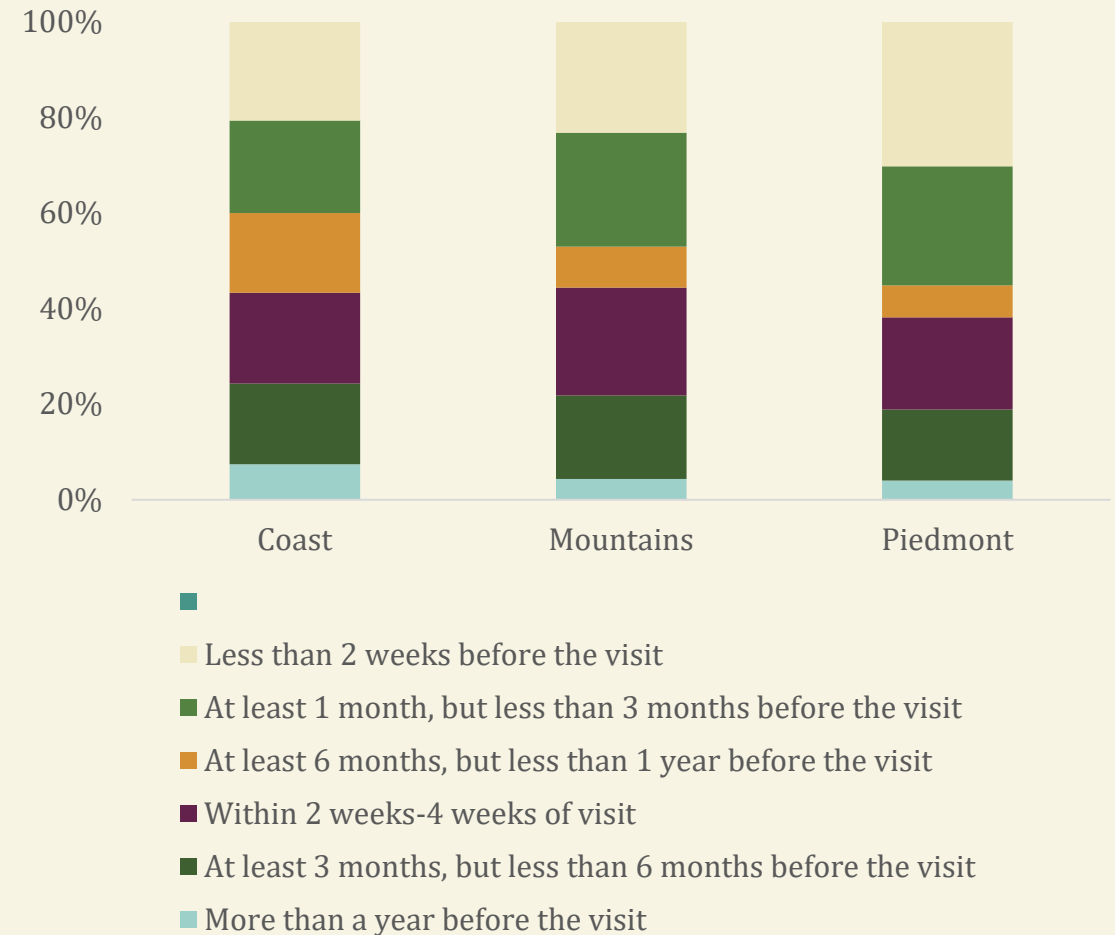


\*Note that responses to this question ranked a satisfaction on a scale of 1-10. Totals are averaged from those ranking 6 or higher in satisfaction.



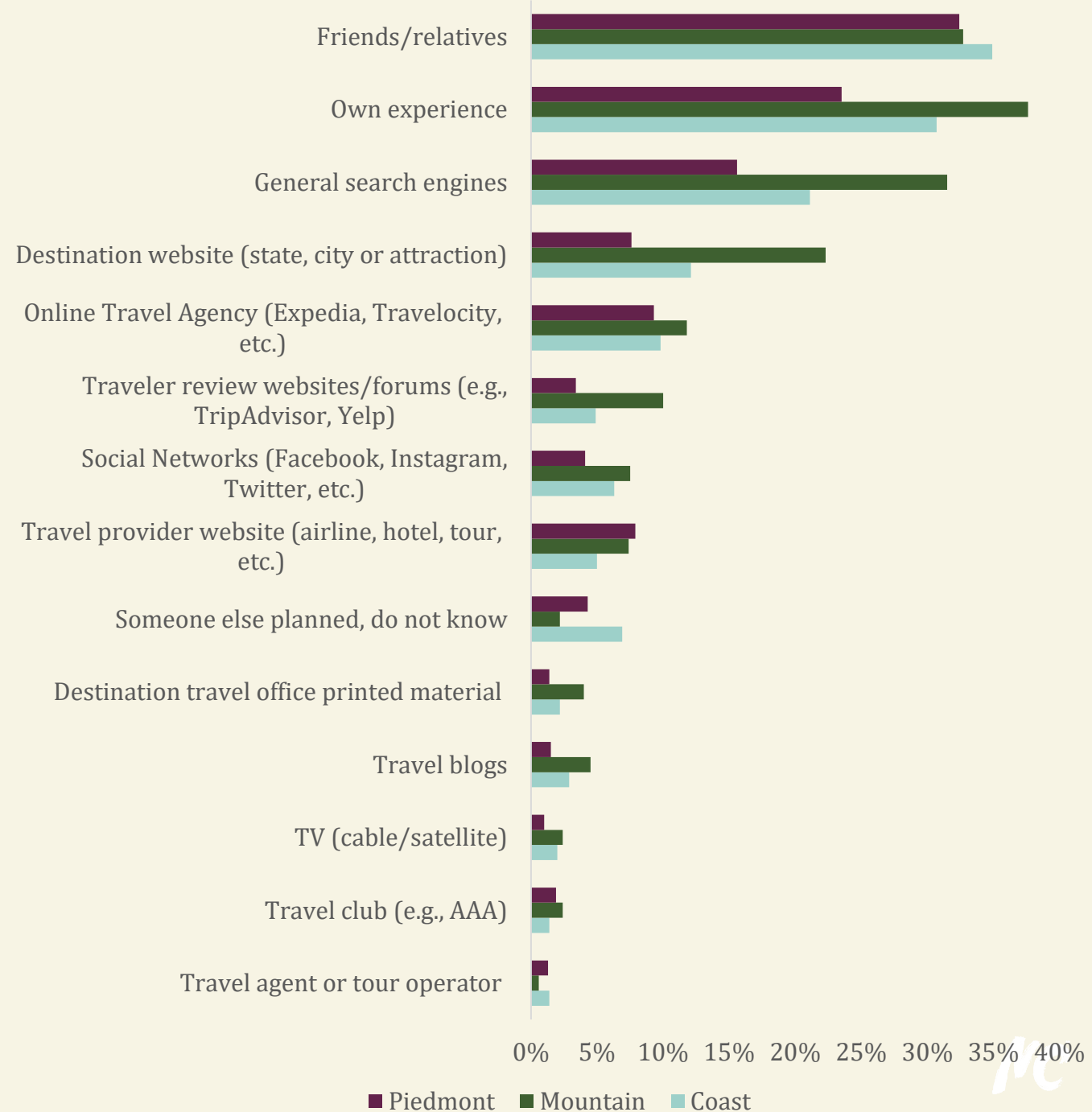
# ADVANCE DECISION FOR OVERNIGHT VISIT TO NORTH CAROLINA BY REGION

- Coastal Region visitors also made the decision to visit farther in advance than other regional visitors.
- Over forty percent of coastal visitors decided to visit North Carolina three months or more before the visit.
- Nearly one-half of visitors to the Piedmont Region made the decision to visit less than four weeks in advance and nearly one-third less than two weeks before the visit.



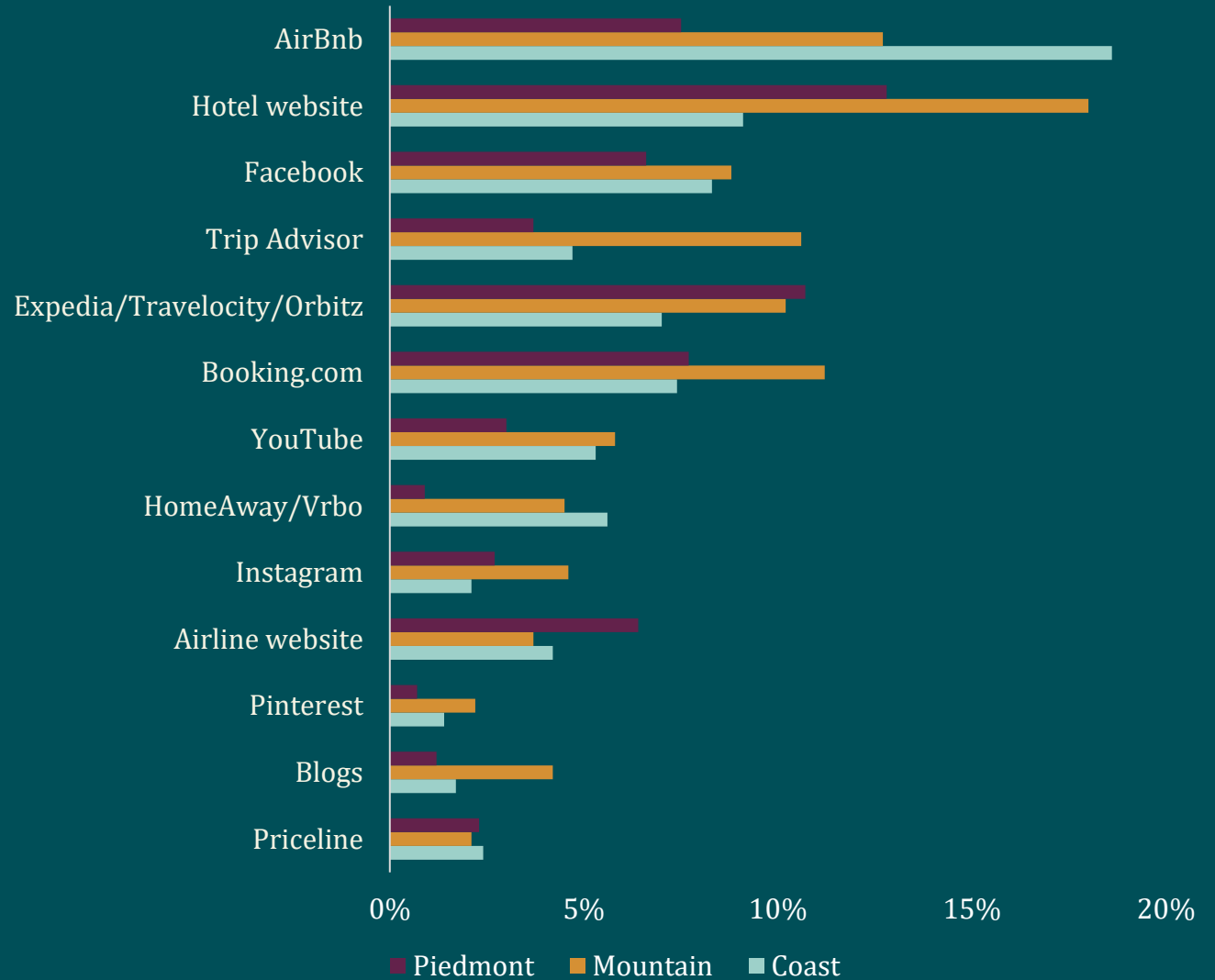
# PLANNING SOURCES FOR OVERNIGHT TRAVEL TO NORTH CAROLINA

- Visitors to the Mountain Region are more likely to use destination websites, general search engines and their own experience to plan travel to NC than visitors to other regions.
- Piedmont Region visitors are most likely to rely on friends/relatives for planning sources.
- Coastal Region visitors are most likely to rely on friends/relatives or their own experience in planning, as well as general search engines.



# RESEARCH SOURCES FOR OVERNIGHT TRAVEL TO NORTH CAROLINA REGIONS

- Visitors to the mountain and piedmont regions are more likely to use hotel websites to research travel than coastal visitors.
- Coastal Region visitors are more likely to research travel through AirBnb and HomeAway/Vrbo.
- Mountain Region visitors are more likely than visitors to the other regions to use Booking.com and Trip Advisor for research.



# TOP ADVERTISING MARKETS FOR REGIONAL VISITORS

Coastal Region Visitor DMA of Origin	
Raleigh-Durham-Fayetteville	18%
Greensboro-High Point- Winston-Salem	7%
Washington DC	6%
New York	6%
Charlotte	5%
Norfolk-Portsmouth-Newport News	5%
Philadelphia	4%
Greenville-New Bern- Washington	3%
Atlanta	3%
Richmond-Petersburg	3%
Pittsburgh	2%
Harrisburg-Lancaster-Lebanon- York	2%
Savannah	2%
Columbus, OH	2%
Baltimore	2%
Greenville-Spartanburg-Asheville-Anderson	2%
Boston-Manchester	2%
Cleveland	2%
Florence-Myrtle Beach	1%
Albany-Schenectady-Troy	1%

Mountain Region Visitor DMA of Origin	
Greenville-Spartanburg-Asheville-Anderson	11%
Raleigh-Durham-Fayetteville	11%
Charlotte	9%
Atlanta	9%
Knoxville	5%
Greensboro-High Point- Winston-Salem	5%
Tampa-St. Petersburg-Sarasota	4%
New York	3%
Columbia, SC	2%
Wilmington	2%
Tri-Cities, TN-VA	2%
Orlando-Dayton Beach- Melbourne	2%
Greenville-New Bern- Washington	2%
Lexington	2%
Austin, TX	2%
Denver	2%
Houston	2%
Miami-Fort Lauderdale	1%
San Antonio	1%
Columbus, OH	1%

Piedmont Region Visitor DMA of Origin	
Raleigh-Durham-Fayetteville	9%
Charlotte	7%
Greensboro-High Point- Winston-Salem	6%
New York	6%
Philadelphia	4%
Atlanta	4%
Greenville-Spartanburg-Asheville-Anderson	4%
Washington DC	3%
Wilmington	3%
Greenville-New Bern- Washington	3%
Tampa-St. Petersburg- Sarasota	3%
Roanoke-Lynchburg	3%
Baltimore	3%
Columbia, SC	2%
Norfolk-Portsmouth-Newport News	2%
Florence- Myrtle Beach	2%
Minneapolis- Saint Paul	2%
Chicago	1%
Orlando-Dayton Beach-Melbourne	1%
Albany-Schenectady-Troy	1%



# OVERNIGHT TRAVEL PARTY CHARACTERISTICS

## Average Party Size

Coastal visitor parties- 3.0, 39% of parties include children  
Mountain visitor parties- 2.6, 31% of parties include children  
Piedmont visitor parties- 2.4, 31% of parties include children

## Average Age

Coastal visitor- 45 years  
Mountain visitor- 49 years  
Piedmont visitor- 46 years

## Ethnicity

Coastal visitor parties- 90% white, 6% black, 10% other  
Mountain visitor parties- 86% white, 9% black, 12% other  
Piedmont visitor parties- 77% white, 17% black, 14% other

\* Multiple responses allowed; thus, percentages do not add to 100%

## Marital Status

Coastal visitor- 64% married  
Mountain visitor- 60% married  
Piedmont visitor- 54% married

## Average Household Income

Coastal visitor parties- \$101K  
Mountain visitor parties- - \$91K  
Piedmont visitor parties- - \$92K

## Children in Household

Coastal visitor parties- - 41%  
Mountain visitor parties- - 36%  
Piedmont visitor parties- - 38%

# 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 DMAs in the United States.