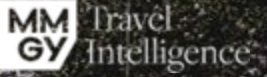


# *North Carolina Visitor Sentiment*

Perceptions, Insights and Pathway to Post-Hurricane Recovery



Performance Tracker  
Wave 5 March 2025 Fielding

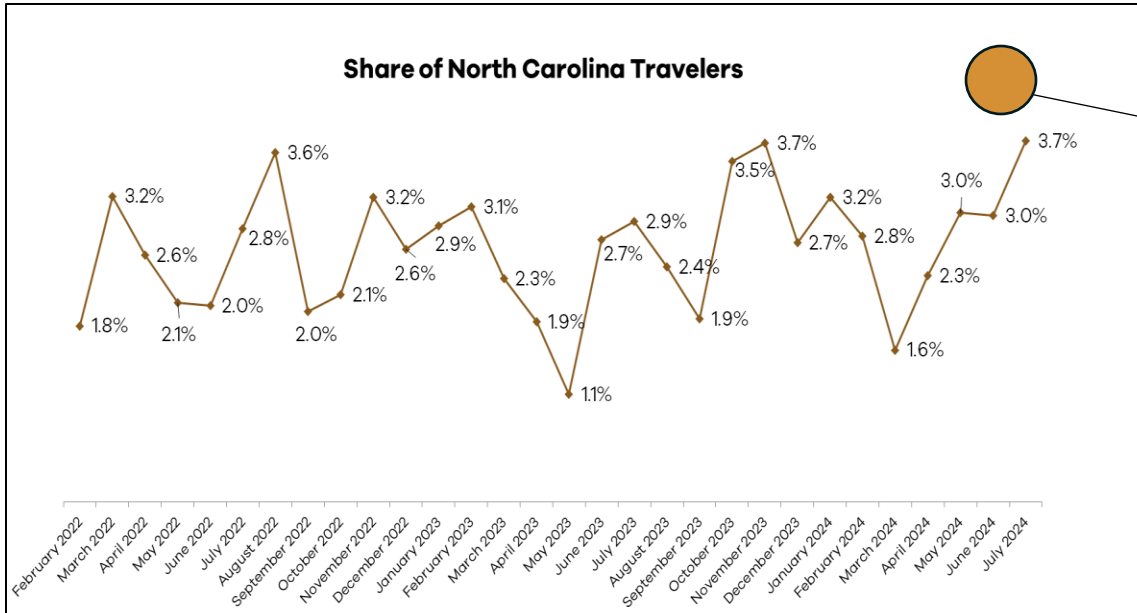


# *Study* METHODOLOGY

# Survey Methodology

- **Objective:** To provide North Carolina timely insights evaluating overall brand perception, post-hurricane sentiment, likelihood of visitation to North Carolina and evaluate long-term travel intentions. This study also aims to track shifts in sentiment and travel intentions, assess the effectiveness of current marketing and communication, and identify information needs of prospective visitors.
- The Performance Tracker is an addendum which serves to add additional monitoring data on a monthly basis, with a focus on key insights into the travel behaviors and perceptions of North Carolina travelers. Share analysis targeted the following key markets:
  - DC
  - Orlando
  - NYC
  - Chicago
  - Tampa, FL
  - Jacksonville, FL
  - Boston, MA
  - Birmingham, AL
  - Texas (Dallas, Houston, Austin)
  - Northeast Region (Albany-Schenectady-Troy/NY, Baltimore, Buffalo, Elmira, Erie, Harrisburg-Lancaster-Lebanon-York, Hartford/New Haven/CT, Johnstown-Altoona-State College/PA, Philadelphia, Pittsburgh, Rochester, Salisbury/MD, Syracuse, Utica, Watertown, Wilkes Barre-Scranton-Hazleton/PA)
  - South Region (Atlanta/GA, Augusta-Aiken/GA-SC, Charleston-Huntington/WV, Charlottesville/VA, Chattanooga/TN, Clarksburg-Weston/WV, Columbus/GA, Ft. Myers-Naples, Gainesville, Harrisonburg/VA, Huntsville-Decatur/AL, Lexington/KY, Louisville/KY, Macon/GA, Miami-Ft. Lauderdale, Mobile-Pensacola, Savannah, Tallahassee, West Palm Beach/FL)
  - Midwest (Cincinnati, Cleveland, Columbus, Dayton, Detroit, Indianapolis, Toledo, Youngstown, Zanesville)
- The survey results highlighted in this report originate from the March 2024 Performance Monitor. Respondents were asked for information around their past 3 months of travel- for this Performance tracker, this includes the months of January, February and March 2025. Data were tabulated and analyzed by MMGY Travel Intelligence.

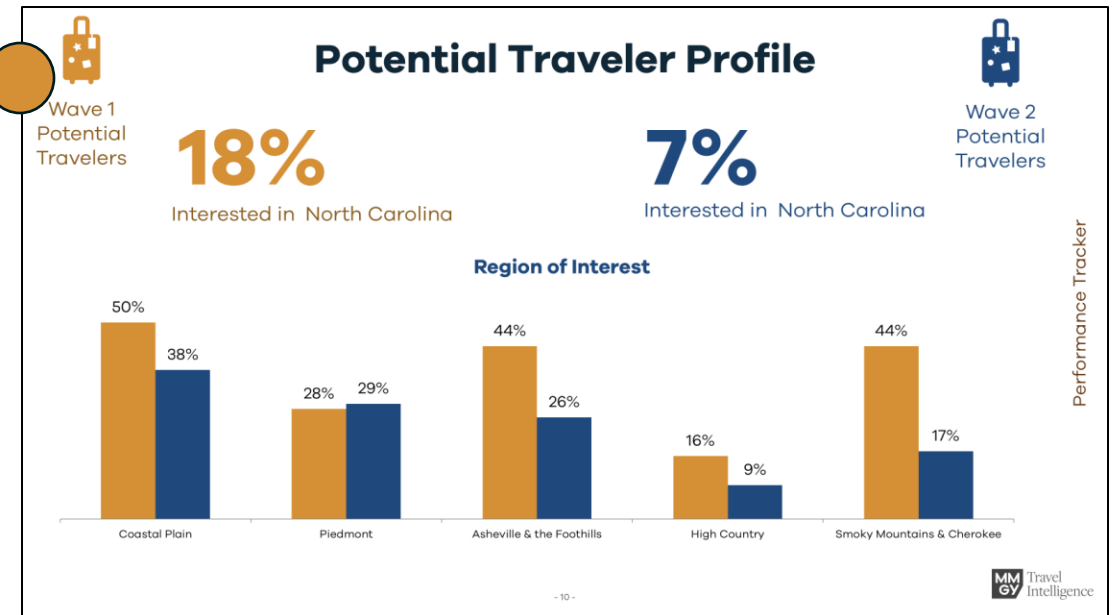
# How to Interpret the Tracker



The share of North Carolina travelers utilizes syndicated data from the Performance Monitor. This survey focuses on past travel for the past 1-3 months. The share of North Carolina travelers indicates what proportion of leisure travelers in the US traveled to North Carolina within a specific month, compared to overall US leisure travel.

The Wave of the study and associated color is indicated by the icons in the upper corners of each slide. Timing for the fielding of Waves is as follows:

- Wave 1: November 2024 (Custom Survey)
- Wave 2: December 2024 (Performance Tracker)
- Wave 3: January 2025 (Performance Tracker)
- Wave 4: February 2025 (Custom Survey)
- Wave 5: March 2025 (Performance Tracker)
- Wave 6: April 2025 (Performance Tracker)
- Wave 7: May 2025 (Custom Survey)



Data is compared across Waves to indicate shifts in respondent perception over time.

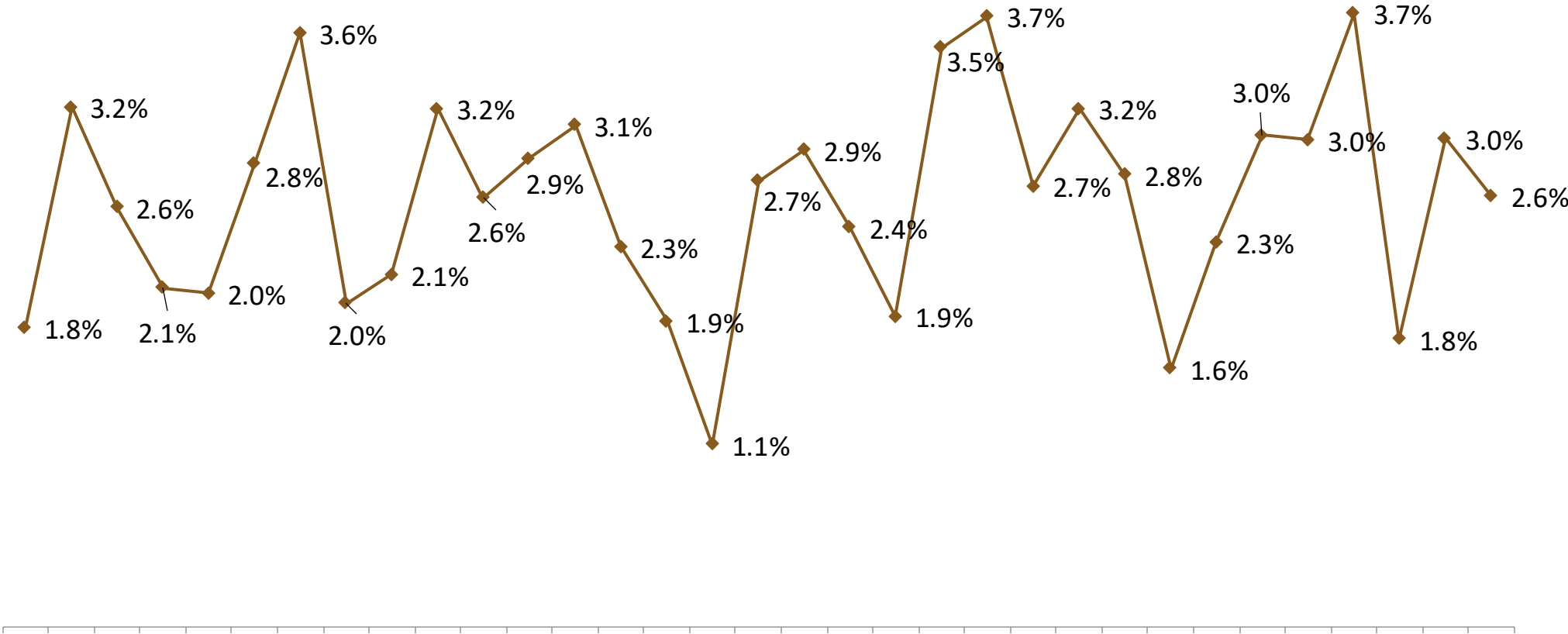
# *Performance* **Tracker**



Past  
Travelers

# Performance Traveler

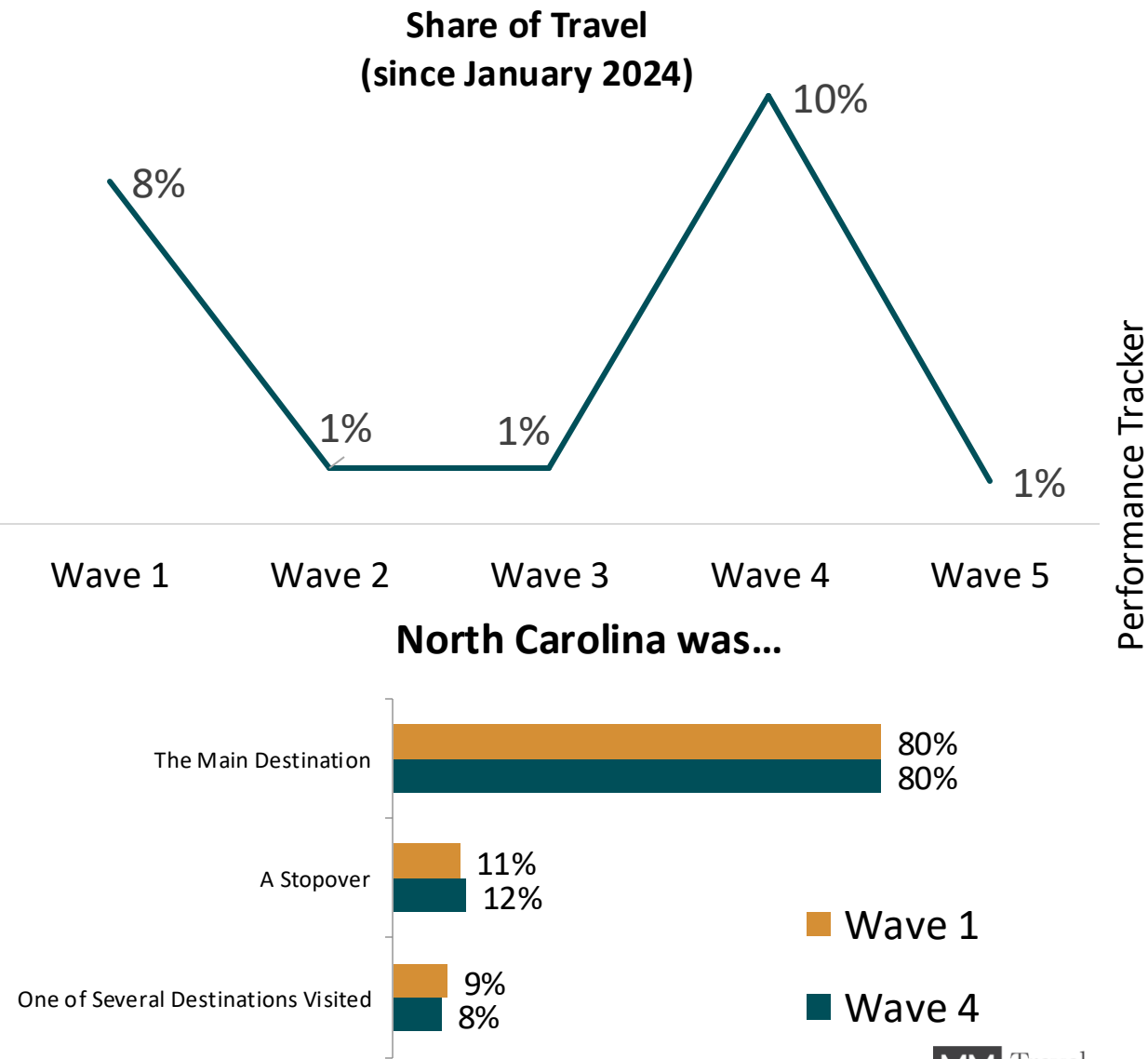
Share of North Carolina Travelers



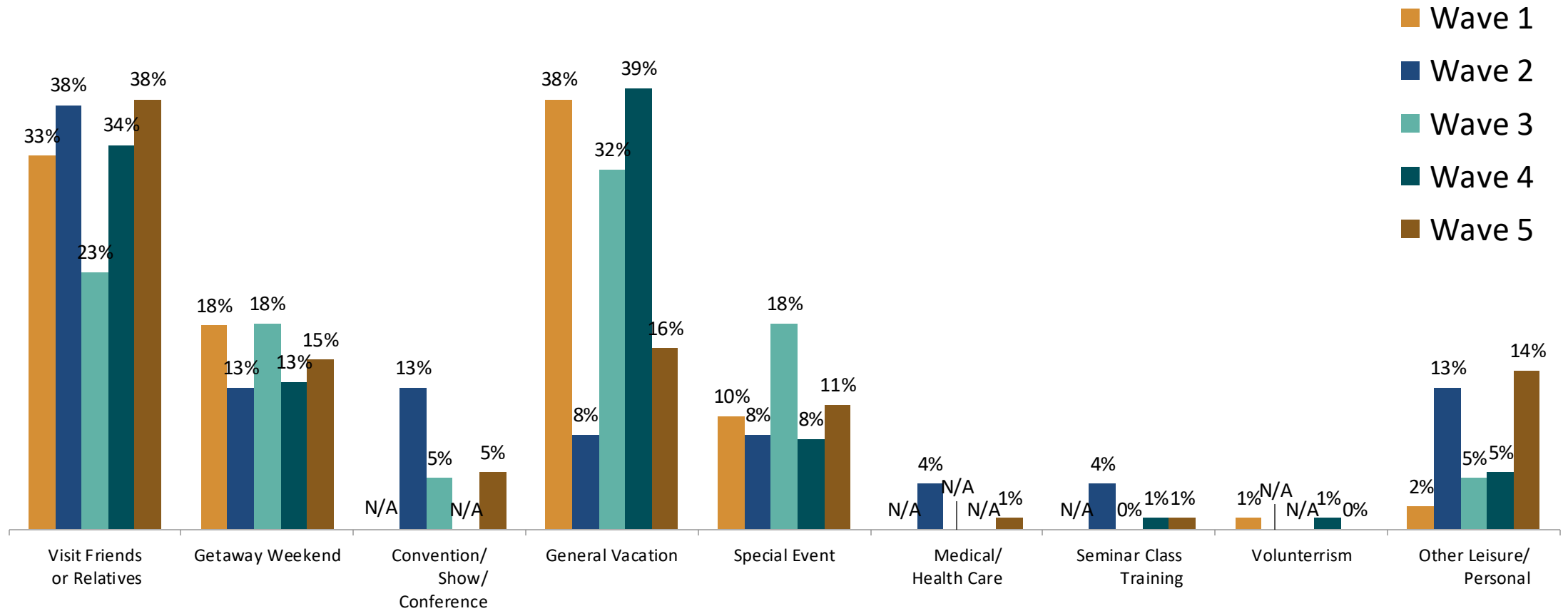
Performance Tracker

# NC shares and Trips

Past Travelers	Mean number of nights (for overnight trips)
Wave 1	4.2
Wave 2	3.5
Wave 3	2.8
Wave 4	4.2
Wave 5	3.7



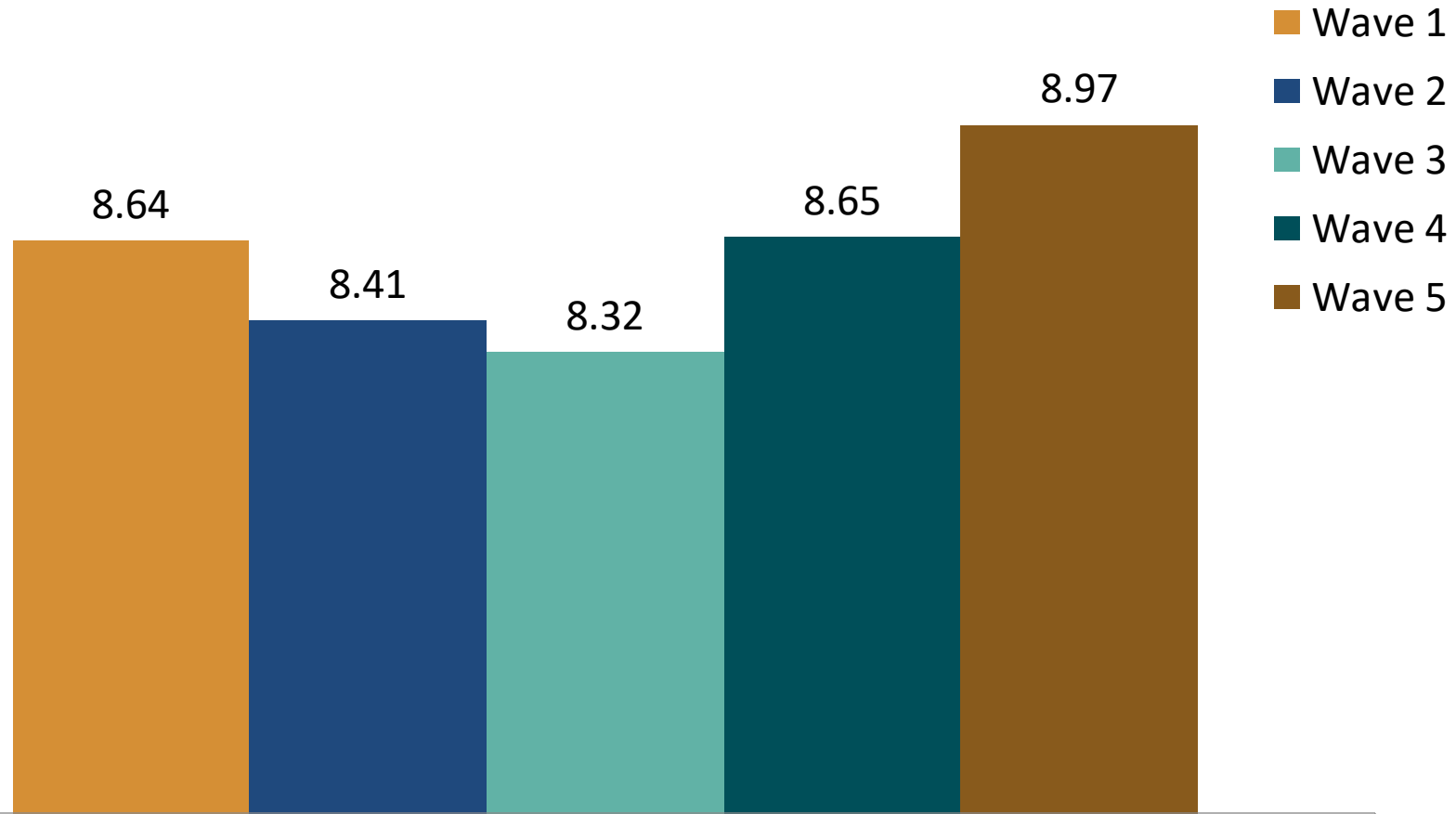
# NC Travel Purpose



Performance Tracker



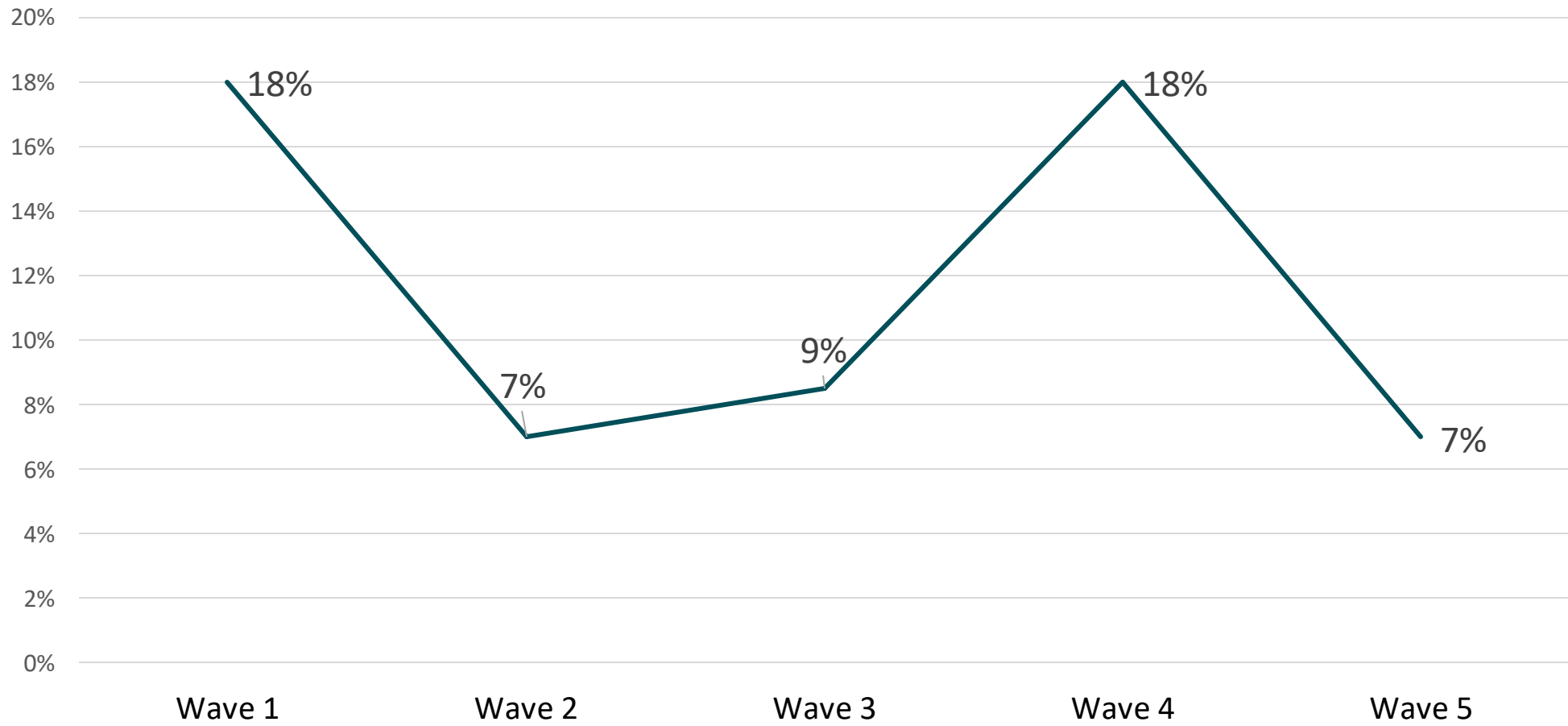
# Satisfaction



Mean Overall Satisfaction

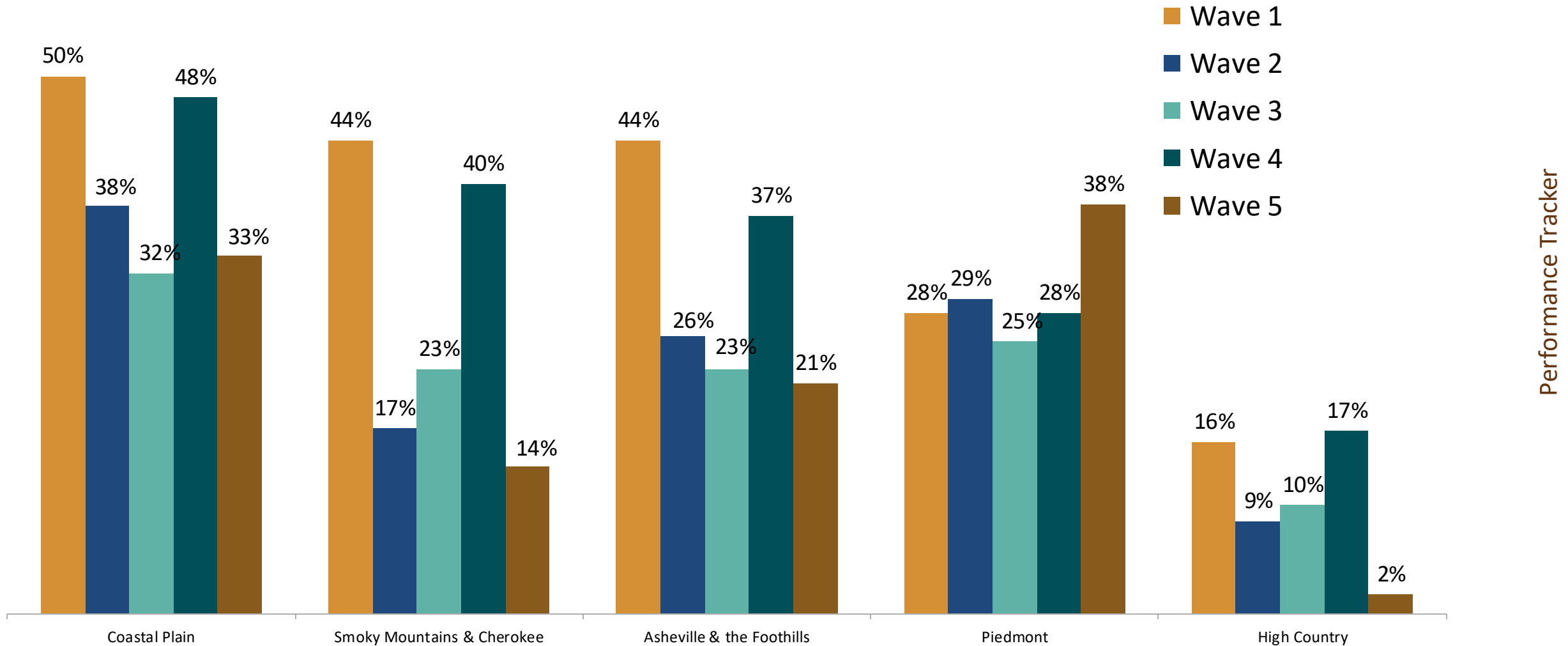
North Carolina visitors continue to leave the state feeling very satisfied. Sixty-seven percent of respondents rated North Carolina a 9 or 10 on a 10-point satisfaction scale, and only 1% of respondents considered their experience poor (rating of 4 or below).

# Interest in Visiting North Carolina before December 2025

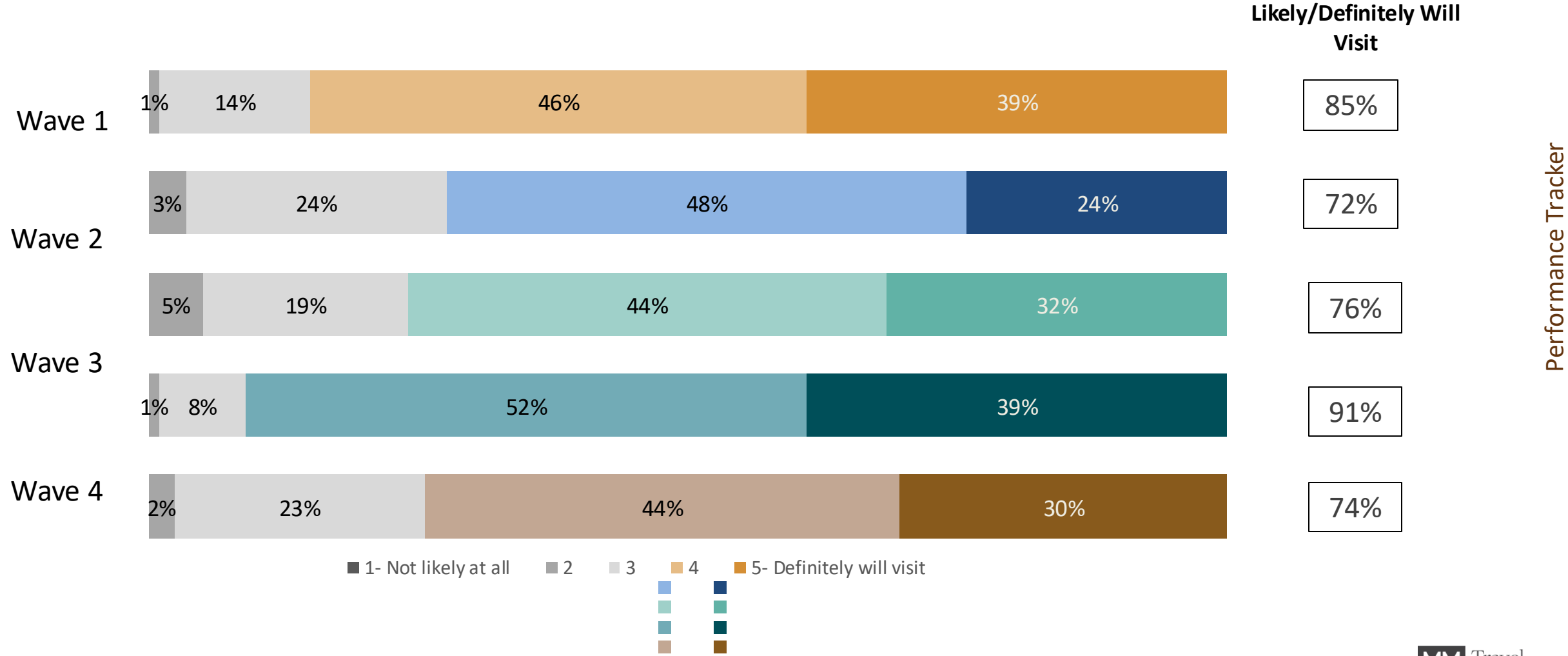


Performance Tracker

# Regions of Interest



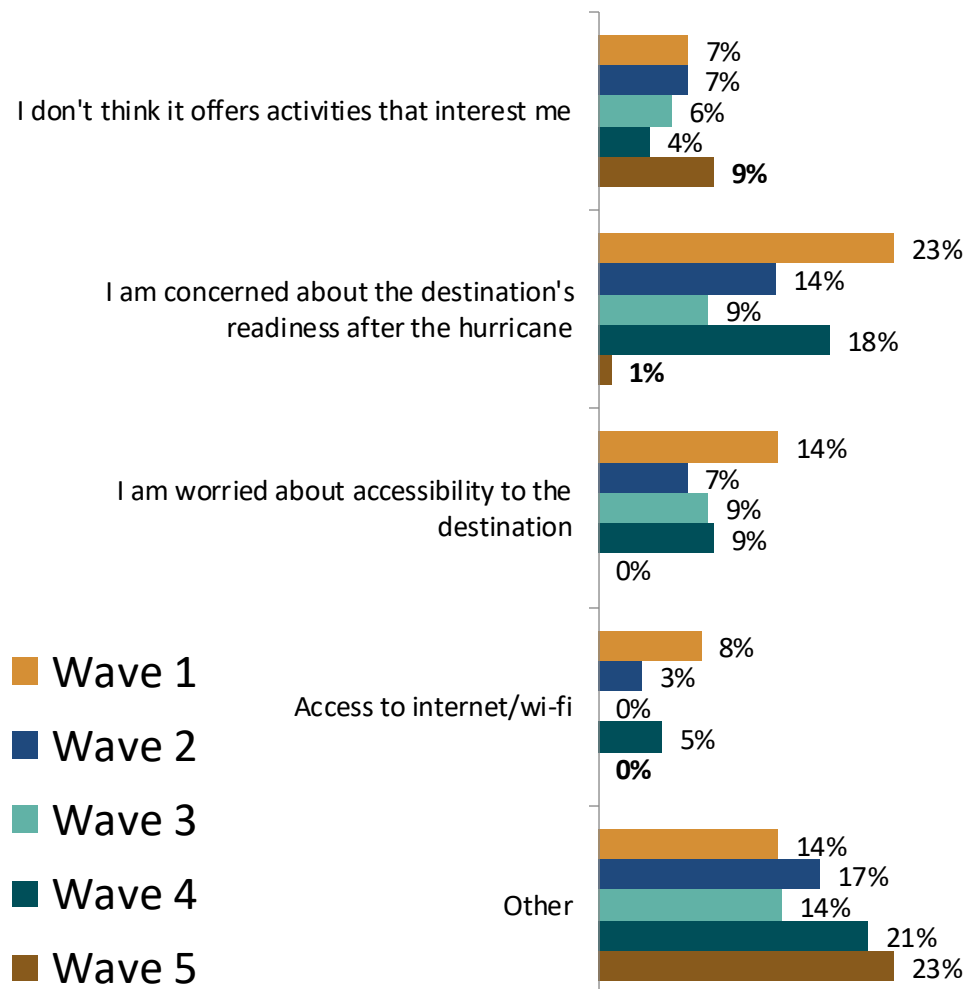
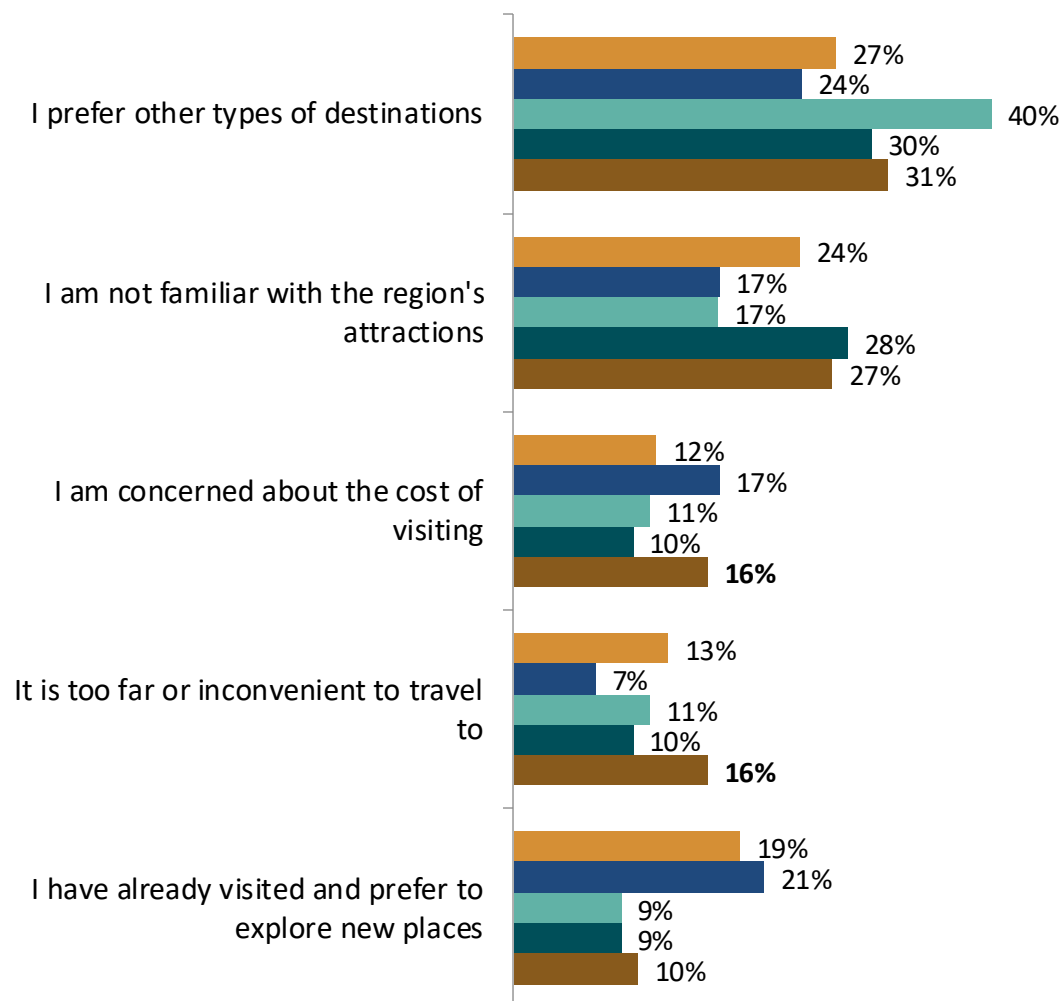
# Likelihood of Traveling to North Carolina before Dec. 31<sup>st</sup> 2025







# Reasons for Disinterest in Visiting Mountain Regions

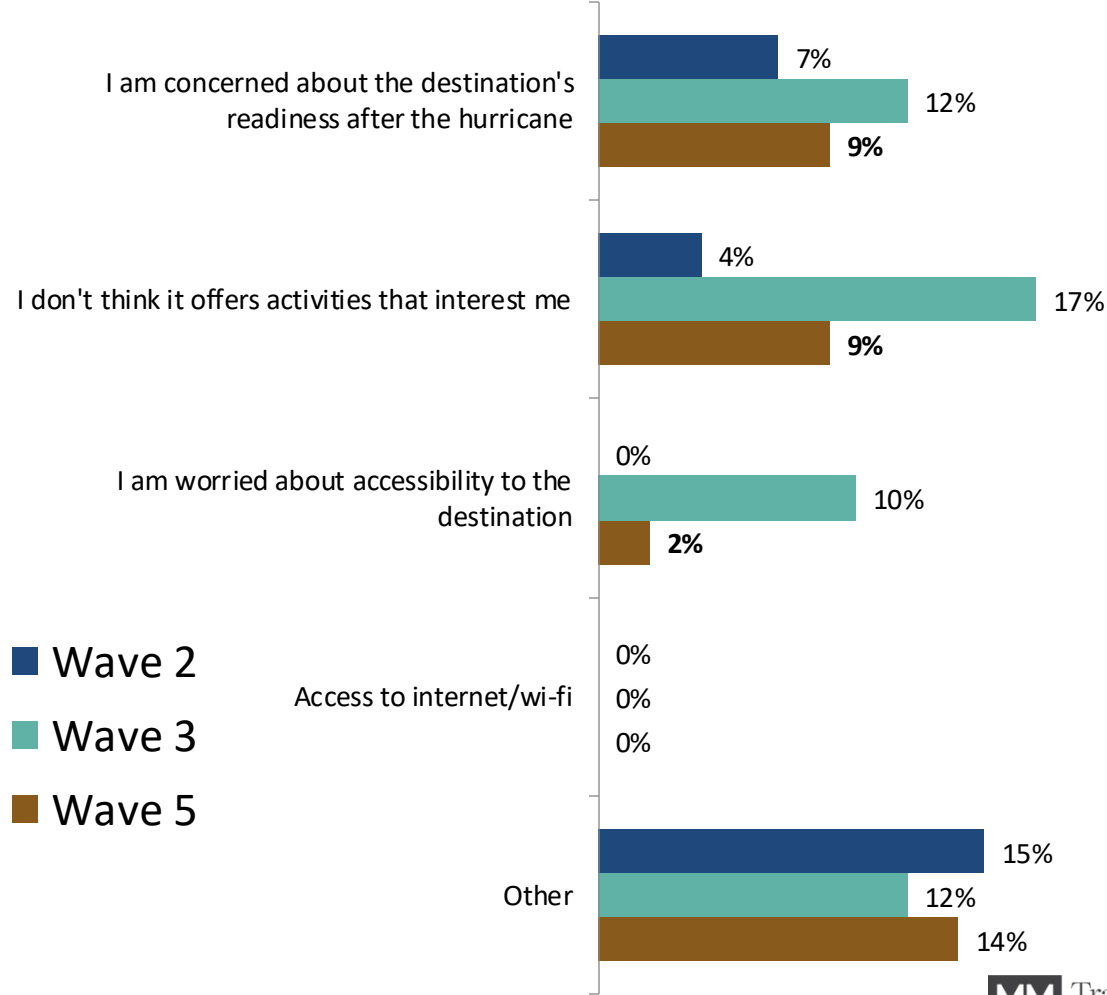
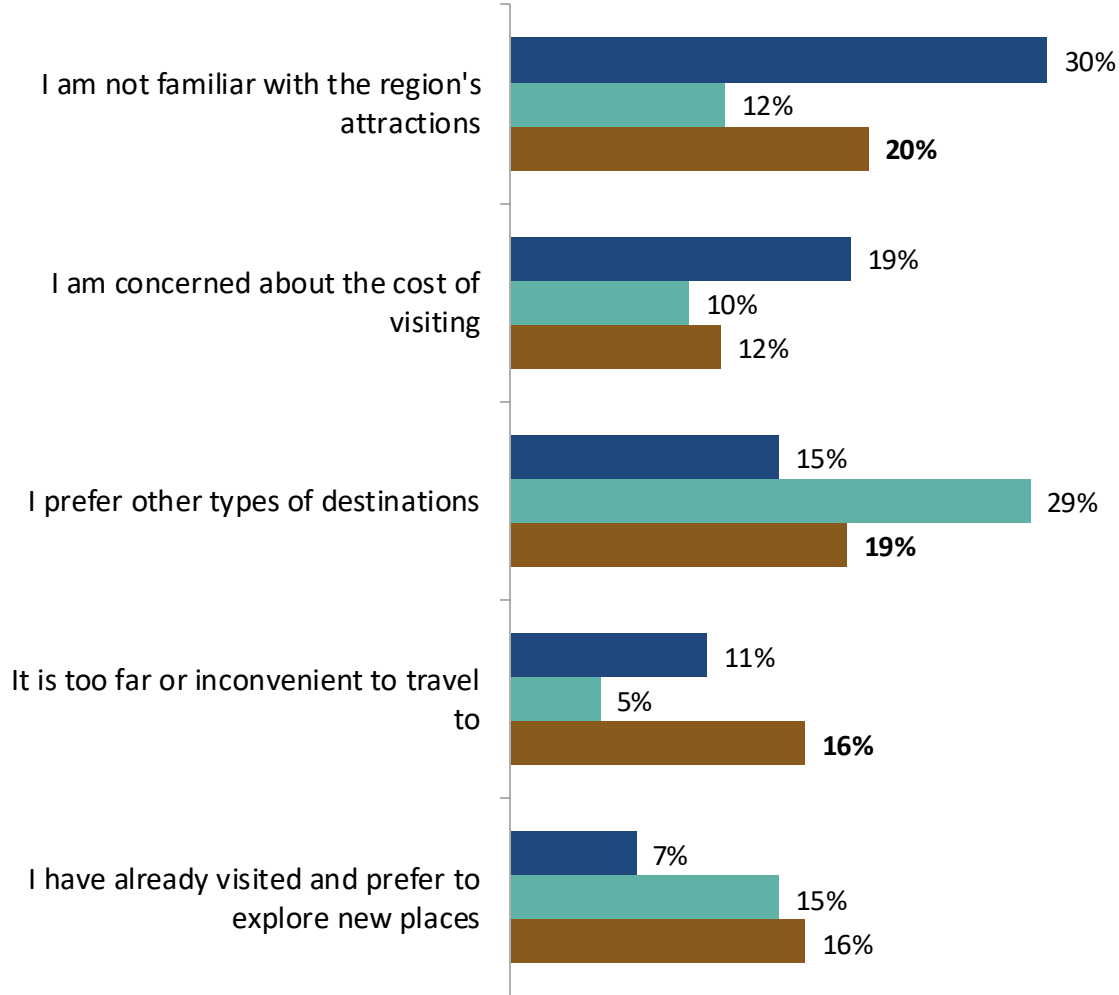


Wave 1  
Wave 2  
Wave 3  
Wave 4  
Wave 5

Performance Tracker



# Reasons for Disinterest in Visiting Coastal Plain Regions

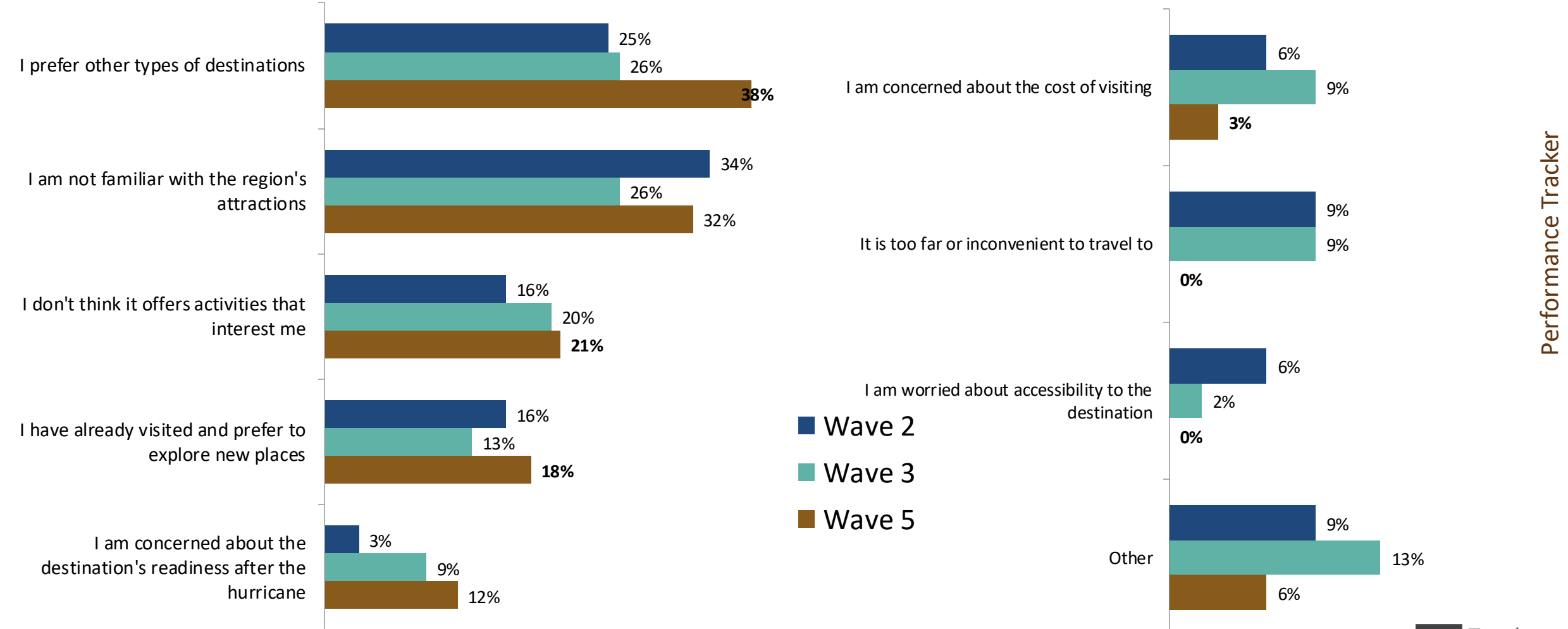


■ Wave 2  
■ Wave 3  
■ Wave 5

Performance Tracker



# Reasons for Disinterest in Visiting Piedmont Region







# *thank you*



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