2014 North Carolina Image & Advertising Accountability Research

January 2015
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Introduction

- Longwoods International was retained to undertake an evaluation of North Carolina’s 2014 tourism advertising campaign.

- This report presents the detailed study findings as they relate to:
  - *North Carolina’s image as a travel destination vs. its key competitors*
  - *The impact of the advertising on North Carolina’s image as a travel destination*
  - *The bottom-line impacts of the campaign*
The research was designed to provide:

- **Strategic image data**
  - What are the image factors and attributes that are important in destination selection?
  - What is North Carolina’s image as a travel destination versus its key competitors: Virginia, Tennessee, West Virginia, South Carolina, Georgia and Florida?

- A measure of both short-of-sales and bottom-line impacts of North Carolina’s tourism advertising:
  - Awareness/recall of the 2014 campaign
  - Incremental short-term trips to North Carolina during and immediately following the advertising campaign
  - Incremental trips planned for the following year
  - Spending in North Carolina by the incremental visitors
  - Direct taxes generated by that spending
The study surveyed travelers in North Carolina’s advertising markets:

- A traveler is defined as a person who has taken a day or overnight pleasure trip within the past 3 years, and intends to take one within the next two years. (66% of those screened met these requirements.)

The study was conducted via a major online consumer sample in the U.S.:

- The sample was selected to be representative of the markets being surveyed (North Carolina, South Carolina, Tennessee, Virginia, Georgia, Washington, DC, Maryland, Florida, and Pennsylvania)
- A total of 1,801 travelers participated in the study
- Data was weighted prior to analysis based on age, gender, income, household size, and market size.
The questionnaire included:

- Travel history
- Image of North Carolina and its competitors (Virginia, Tennessee, West Virginia, South Carolina, Georgia, Florida) as a travel destination on a battery of 64 attributes
- Respondents were exposed to actual copies of the North Carolina’s tourism ads. We use this aided recognition technique in order to minimize potential confusion of North Carolina’s ads with other destinations/advertisers that may be similar.
Destination Past Visitation & Interest
Past and Future Visitation to North Carolina

- Over six out of ten travelers have experienced North Carolina at least once.
- Half of the travelers plan an overnight or day visit to North Carolina in the next year.
- The intent on visiting North Carolina for an overnight trip is 49% while a day trip is 40%.
- The visitation intent for both day and overnight North Carolina trips is higher among the primary advertised markets than the secondary markets.
- Half of travelers in the Atlanta DMA plan to visit North Carolina for overnight or day trips; while 44% of travelers in the Washington, DC DMA plan to visit.
Ever Visited — Day/Overnight Trip

Base: Those who have ever visited on a day or overnight trip

- Florida: 79%
- North Carolina: 62%
- Virginia: 59%
- Georgia: 57%
- South Carolina: 53%
- Tennessee: 46%
- West Virginia: 30%
Past 2 Years—Day/Overnight Trip

Base: Those who have ever visited on a day or overnight trip for each state

- Florida: 56%
- North Carolina: 39%
- Virginia: 33%
- Georgia: 32%
- South Carolina: 30%
- Tennessee: 23%
- West Virginia: 11%

Percent Who Strongly Agree
Intent to Visit in the Next Year

Base: Those who have ever visited on a day or overnight trip

- Florida: 64%
- North Carolina: 50%
- Virginia: 44%
- South Carolina: 44%
- Georgia: 43%
- Tennessee: 35%
- West Virginia: 23%
Intent to Visit North Carolina in the Next Year

Base: Those who have ever visited on a day or overnight trip

Percent who Definitely/Probably Will Visit

<table>
<thead>
<tr>
<th></th>
<th>2010</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overnight/Day</td>
<td>47</td>
<td>50</td>
</tr>
<tr>
<td>Overnight</td>
<td>40</td>
<td>49</td>
</tr>
<tr>
<td>Day</td>
<td>30</td>
<td>40</td>
</tr>
</tbody>
</table>
Travel Motivators and Hot Buttons
Longwoods takes an innovative approach to profiling the factors that motivate travel and destination choice:

- Direct questioning of respondents on this subject can often lead to misleading answers. Respondents’ answers tend to favor rational over emotional ideas because they are easier to call to mind and articulate.

Longwoods, therefore, takes an indirect approach to uncovering these motivators:

- Through predictive modeling analytics, we get below the surface and uncover the true factors that drive overall ratings of destination appeal and choice.
Respondents are asked to rate selected states across a robust list of destination attributes or characteristics.

The statistical correlation between each attribute rating and the overall rating for being “A place I would really enjoy visiting” is then calculated.

- attributes showing strong correlations are strong predictors of destination choice and those with the highest are the ‘Hot Buttons’ that should be included in the communications messaging strategy.

- Travel Motivator factors reflect the aggregated importance across related attributes.
The most important **factors** that drive interest in a destination choice in North Carolina’s advertised markets are:

- **is exciting** – an exciting, fun, and must see place that provides some sense of real adventure.
- **is also a great destination for adults** but also provides a good **family atmosphere** – a place that is good for families and that children would enjoy.
- **the destination must be welcoming, comfortable, and a good place to relax.**

It is also important in these markets that the destination communicates the hot buttons of:

- **provides unique experiences.**
- **the destination has a lot to see and do.**
Travel Motivators

**Exciting**
**Adult Destination**
**Family Atmosphere**
**Worry Free**
**Popular**
**Unique**
**Luxurious**
**Climate**
**Affordable**
**Sightseeing**
**Entertainment**
**Sports and Recreation**

*Relative Importance*

*A measure of the degree of association between each factor and whether destination is a place “I would really enjoy visiting.”*
## Top 10 Hot Buttons

<table>
<thead>
<tr>
<th>Button</th>
</tr>
</thead>
<tbody>
<tr>
<td>A fun place</td>
</tr>
<tr>
<td>Where I would feel comfortable</td>
</tr>
<tr>
<td>Must see destination</td>
</tr>
<tr>
<td>I would feel welcome</td>
</tr>
<tr>
<td>An exciting place</td>
</tr>
<tr>
<td>Unique vacation experience</td>
</tr>
<tr>
<td>Lots of things to see and do</td>
</tr>
<tr>
<td>Good place for families</td>
</tr>
<tr>
<td>Good for an adult vacation</td>
</tr>
<tr>
<td>Good place to relax/escape from hectic life</td>
</tr>
</tbody>
</table>
North Carolina’s Image
North Carolina’s Image

- To obtain travelers’ perceptions of North Carolina and its key competitors, respondents were asked to rate each state across a battery of attributes, using a ten-point scale where 10 meant ‘Agree completely’ and 1 meant ‘Do not agree at all’.
  - a 0’ rating was allowed if they had no impression at all.
  - image charts report the proportion of respondents who rated a destination at 10, 9, or an 8 on each attribute.

- Competitive states included: Virginia, West Virginia, Florida, Georgia, South Carolina and Tennessee.
North Carolina’s Image Strengths/Weaknesses

- North Carolina received its highest image ratings versus the competitors average for its:
  - outdoor assets:
    - Diverse landscapes, fall colors, good trail system, and natural, unspoiled scenic beauty
  - sports related:
    - motor sports/NASCAR events, beaches/watersports, outdoor adventure sports
    - a good contrast of seasons
    - feeling comfortable
    - warm and friendly people

- Only the hot buttons of “feeling comfortable,” “a good place to relax,” and “is a place I would feel welcomed” are rated higher than the competitors average.

- North Carolina has no major weaknesses versus the competitor average.
North Carolina Image Strengths vs. Competitors

Difference in Percent Who Strongly Agree

- Diversity of landscapes: 23
- Good for motorsports/NASCAR events: 12
- Great for beaches/watersports: 12
- Beautiful fall colors/foliage: 11
- Great for outdoor adventure sports: 10
- A good contrast of seasons: 9
- Good trail system: 8
- Where I would feel comfortable: 7
- Natural, unspoiled scenic beauty: 7
- Warm, friendly people: 7

Note: Circled attributes are some of the most important image hot buttons for travelers.
North Carolina Image Strengths vs. Competitors (Cont’d)

- Good place to relax/escape from hectic life: 6
- Interesting arts/crafts: 6
- Truly beautiful scenery: 6
- Interesting small towns/villages: 6
- Beautiful gardens and parks: 6
- Right distance for a weekend getaway: 6
- Great for winery/vineyard touring: 6
- Excellent state park facilities: 6
- A place I would feel welcome: 6
- Great for professional/college sports: 6

Note: Circled attributes are some of the most important image hot buttons for travelers.

Base: Total Travelers
North Carolina Image Weaknesses vs. Competitors

Base: Total Travelers

- Exciting nightlife/entertainment/shows: -5
- Great live music: -4
- Well-known landmarks: -3
- Children would especially enjoy: -3

Difference in Percent Who Strongly Agree

-30 -20 -10 0
North Carolina’s Image vs. the Competition
North Carolina’s Image vs. Competitors

- North Carolina’s image is rated higher for Worry Free, Unique, Climate, and Sports and Recreation versus the competitors average.
- The primary markets rate North Carolina’s image stronger than the secondary markets.
- The North Carolina image in the Atlanta DMA has stronger ratings than in the Washington, DC DMA.
- North Carolina’s image ratings are similar to the other states studied as seen in slides 32 - 74. Florida is higher on few factors.
North Carolina’s Image vs. Competitors

Base: Total Travelers

Relative Importance*

- Competitors: Virginia, Tennessee, West Virginia, South Carolina, Georgia, Florida

<table>
<thead>
<tr>
<th>Feature</th>
<th>North Carolina</th>
<th>Competitors*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exciting</td>
<td>50</td>
<td>49</td>
</tr>
<tr>
<td>Adult Destination</td>
<td>57</td>
<td>56</td>
</tr>
<tr>
<td>Family Atmosphere</td>
<td>53</td>
<td>53</td>
</tr>
<tr>
<td>Worry Free</td>
<td>55</td>
<td>55</td>
</tr>
<tr>
<td>Popular</td>
<td>49</td>
<td>50</td>
</tr>
<tr>
<td>Unique</td>
<td>49</td>
<td>50</td>
</tr>
<tr>
<td>Luxurious</td>
<td>45</td>
<td>49</td>
</tr>
<tr>
<td>Climate</td>
<td>48</td>
<td>51</td>
</tr>
<tr>
<td>Affordable</td>
<td>48</td>
<td>52</td>
</tr>
<tr>
<td>Sightseeing</td>
<td>48</td>
<td>52</td>
</tr>
<tr>
<td>Entertainment</td>
<td>47</td>
<td>51</td>
</tr>
<tr>
<td>Sports and Recreation</td>
<td>47</td>
<td>54</td>
</tr>
</tbody>
</table>

Percent Who Strongly Agree

* North Carolina: 42, 42, 42, 42, 42, 42, 42, 42, 42, 42, 42, 42, 42, 42, 42

** Competitors: 48, 48, 48, 48, 48, 48, 48, 48, 48, 48, 48, 48, 48, 48, 48
North Carolina’s Image – Primary vs. Secondary Markets

Base: Total Travelers

Primary markets include North and South Carolina, Georgia, Virginia, Pennsylvania and Florida. Secondary market include Maryland, Tennessee, and Washington DC.
North Carolina’s Image – Atlanta and Washington, DC Markets

Base: Total Travelers

- Exciting
- Adult Destination
- Family Atmosphere
- Worry Free
- Popular
- Unique
- Luxurious
- Climate
- Affordable
- Sightseeing
- Entertainment
- Sports & Recreation

Percent Who Strongly Agree

<table>
<thead>
<tr>
<th>Feature</th>
<th>Atlanta</th>
<th>Washington DC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exciting</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adult Destination</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Family Atmosphere</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Worry Free</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Popular</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unique</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Luxurious</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Climate</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Affordable</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sightseeing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Entertainment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sports &amp; Recreation</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Base: Total Travelers

<table>
<thead>
<tr>
<th>State</th>
<th>Percent Who Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Florida</td>
<td>65</td>
</tr>
<tr>
<td>Virginia</td>
<td>60</td>
</tr>
<tr>
<td>North Carolina</td>
<td>60</td>
</tr>
<tr>
<td>Tennessee</td>
<td>58</td>
</tr>
<tr>
<td>South Carolina</td>
<td>56</td>
</tr>
<tr>
<td>Georgia</td>
<td>53</td>
</tr>
<tr>
<td>West Virginia</td>
<td>42</td>
</tr>
</tbody>
</table>
North Carolina Image vs. Competitors — Exciting

Base: Total Travelers

Note: Circled attributes are some of the most important image hot buttons for travelers
North Carolina Image vs. Competitors — Exciting

Base: Total Travelers

<table>
<thead>
<tr>
<th>State</th>
<th>Percent Who Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Florida</td>
<td>63</td>
</tr>
<tr>
<td>South Carolina</td>
<td>51</td>
</tr>
<tr>
<td>Virginia</td>
<td>51</td>
</tr>
<tr>
<td>Tennessee</td>
<td>50</td>
</tr>
<tr>
<td>North Carolina</td>
<td>50</td>
</tr>
<tr>
<td>Georgia</td>
<td>41</td>
</tr>
<tr>
<td>West Virginia</td>
<td>35</td>
</tr>
</tbody>
</table>
North Carolina Image vs. Competitors — Adult Destination

Base: Total Travelers

Note: Circled attributes are some of the most important image hot buttons for travelers
North Carolina Image vs. Competitors — Family Atmosphere

Base: Total Travelers

- **Family Atmosphere**
  - 53% of travelers from North Carolina strongly agreed.
  - 53% of travelers from competitors strongly agreed.

- **Good place for families**
  - 61% of travelers from North Carolina strongly agreed.
  - 57% of travelers from competitors strongly agreed.

- **Children would especially enjoy**
  - 45% of travelers from North Carolina strongly agreed.
  - 48% of travelers from competitors strongly agreed.

Note: Circled attributes are some of the most important image hot buttons for travelers.
North Carolina Image vs. Competitors — Family Atmosphere

Base: Total Travelers

Percent Who Strongly Agree

<table>
<thead>
<tr>
<th>State</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Florida</td>
<td>74</td>
</tr>
<tr>
<td>South Carolina</td>
<td>54</td>
</tr>
<tr>
<td>North Carolina</td>
<td>53</td>
</tr>
<tr>
<td>Virginia</td>
<td>52</td>
</tr>
<tr>
<td>Tennessee</td>
<td>50</td>
</tr>
<tr>
<td>Georgia</td>
<td>42</td>
</tr>
<tr>
<td>West Virginia</td>
<td>39</td>
</tr>
</tbody>
</table>
North Carolina Image vs. Competitors
— Worry Free

Base: Total Travelers

Worry Free
- Where I would feel comfortable: North Carolina 59, Competitors 57
- A place I would feel welcome: North Carolina 57, Competitors 51
- Good place to relax/escape from hectic life: North Carolina 58, Competitors 52
- Variety of dining options: North Carolina 54, Competitors 55
- Safe place to travel in tourist areas: North Carolina 60, Competitors 56
- Warm, friendly people: North Carolina 55, Competitors 48
- Right distance for a weekend getaway: North Carolina 39, Competitors 45

Percent Who Strongly Agree
North Carolina: Green
Competitors: Blue

Note: Circled attributes are some of the most important image hot buttons for travelers
North Carolina’s Image vs. Competitors — Worry Free

Base: Total Travelers

<table>
<thead>
<tr>
<th>State</th>
<th>Percent Who Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>North Carolina</td>
<td>55</td>
</tr>
<tr>
<td>South Carolina</td>
<td>54</td>
</tr>
<tr>
<td>Virginia</td>
<td>53</td>
</tr>
<tr>
<td>Florida</td>
<td>53</td>
</tr>
<tr>
<td>Tennessee</td>
<td>52</td>
</tr>
<tr>
<td>Georgia</td>
<td>47</td>
</tr>
<tr>
<td>West Virginia</td>
<td>42</td>
</tr>
</tbody>
</table>
North Carolina Image vs. Competitors — Popular

Base: Total Travelers

Percent Who Strongly Agree

<table>
<thead>
<tr>
<th>Statement</th>
<th>North Carolina</th>
<th>Competitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Popular</td>
<td>49</td>
<td>49</td>
</tr>
<tr>
<td>Popular with vacationers</td>
<td>54</td>
<td>52</td>
</tr>
<tr>
<td>Well-known destination</td>
<td>54</td>
<td>55</td>
</tr>
<tr>
<td>I often notice advertising</td>
<td>39</td>
<td>40</td>
</tr>
</tbody>
</table>

Base: Total Travelers
North Carolina Image vs. Competitors — Popular

Base: Total Travelers

Percent Who Strongly Agree

<table>
<thead>
<tr>
<th>State</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Florida</td>
<td>74</td>
</tr>
<tr>
<td>South Carolina</td>
<td>52</td>
</tr>
<tr>
<td>North Carolina</td>
<td>49</td>
</tr>
<tr>
<td>Virginia</td>
<td>49</td>
</tr>
<tr>
<td>Tennessee</td>
<td>44</td>
</tr>
<tr>
<td>Georgia</td>
<td>40</td>
</tr>
<tr>
<td>West Virginia</td>
<td>28</td>
</tr>
</tbody>
</table>
North Carolina Image vs. Competitors — Unique

Base: Total Travelers

Unique

Unique vacation experience

Unique scenery

Interesting local people

Diversity of landscapes

Great for locally grown specialty foods

Percent Who Strongly Agree

North Carolina Competitors

Note: Circled attributes are some of the most important image hot buttons for travelers
North Carolina Image vs. Competitors — Unique

Base: Total Travelers

Percent Who Strongly Agree

North Carolina 51
Virginia 51
South Carolina 47
Florida 44
Tennessee 44
Georgia 43
West Virginia 39
North Carolina Image vs. Competitors — Luxurious

Base: Total Travelers

Luxurious
- North Carolina: 47%
- Competitors: 48%

First-class hotels/resorts
- North Carolina: 52%
- Competitors: 52%

Elegant, sophisticated restaurants
- North Carolina: 43%
- Competitors: 43%
North Carolina Image vs. Competitors — Luxurious

Base: Total Travelers

Percent Who Strongly Agree

- Florida: 64%
- Virginia: 51%
- South Carolina: 49%
- North Carolina: 47%
- Georgia: 45%
- Tennessee: 43%
- West Virginia: 31%

Chart showing the percent of travelers who strongly agree with the luxurious image of North Carolina compared to other states.
North Carolina Image vs. Competitors — Climate

Base: Total Travelers

- Climate
  - North Carolina: 52%
  - Competitors: 46%

- Excellent climate overall
  - North Carolina: 49%
  - Competitors: 47%

- A good contrast of seasons
  - North Carolina: 55%
  - Competitors: 45%
North Carolina Image vs. Competitors — Climate

Base: Total Travelers

Percent Who Strongly Agree

Virginia: 52
North Carolina: 52
Tennessee: 50
South Carolina: 49
West Virginia: 45
Georgia: 44
Florida: 36
North Carolina Image vs. Competitors — Affordable

- Affordable
- Excellent vacation value for the money
- Affordable accommodations
- Affordable to eat there
- Affordable to get to
- Not too far away to consider for a vacation

Base: Total Travelers

Percent Who Strongly Agree

<table>
<thead>
<tr>
<th></th>
<th>North Carolina</th>
<th>Competitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Affordable</td>
<td>51</td>
<td>47</td>
</tr>
<tr>
<td>Excellent vacation value for the money</td>
<td>48</td>
<td>45</td>
</tr>
<tr>
<td>Affordable accommodations</td>
<td>49</td>
<td>45</td>
</tr>
<tr>
<td>Affordable to eat there</td>
<td>52</td>
<td>49</td>
</tr>
<tr>
<td>Affordable to get to</td>
<td>52</td>
<td>47</td>
</tr>
<tr>
<td>Not too far away to consider for a vacation</td>
<td>56</td>
<td>50</td>
</tr>
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</table>
North Carolina Image vs. Competitors — Affordable

Base: Total Travelers

Percent Who Strongly Agree

<table>
<thead>
<tr>
<th>State</th>
<th>Tennessee</th>
<th>North Carolina</th>
<th>Virginia</th>
<th>West Virginia</th>
<th>South Carolina</th>
<th>Georgia</th>
<th>Florida</th>
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<tbody>
<tr>
<td>Value</td>
<td>52</td>
<td>51</td>
<td>51</td>
<td>50</td>
<td>45</td>
<td>44</td>
<td>43</td>
</tr>
</tbody>
</table>
North Carolina Image vs. Competitors — Sightseeing

Base: Total Travelers

Percent Who Strongly Agree

- North Carolina
- Competitors

Note: Circled attributes are some of the most important image hot buttons for travelers
North Carolina Image vs. Competitors — Sightseeing (Cont’d)

Base: Total Travelers

- Sightseeing
- Good for viewing wildlife/birds
- Interesting arts/crafts
- Beautiful fall colors/foliage
- Noted for Civil War historic sites
- Great for winery/vineyard touring
- Good for touring film/tv locations
- Great local microbreweries/beer

Percent Who Strongly Agree
- North Carolina
- Competitors
North Carolina Image vs. Competitors — Sightseeing

Base: Total Travelers
North Carolina Image vs. Competitors — Entertainment

Base: Total Travelers

Percent Who Strongly Agree

<table>
<thead>
<tr>
<th>State</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Florida</td>
<td>50</td>
</tr>
<tr>
<td>Tennessee</td>
<td>46</td>
</tr>
<tr>
<td>South Carolina</td>
<td>42</td>
</tr>
<tr>
<td>Virginia</td>
<td>42</td>
</tr>
<tr>
<td>North Carolina</td>
<td>42</td>
</tr>
<tr>
<td>Georgia</td>
<td>41</td>
</tr>
<tr>
<td>West Virginia</td>
<td>28</td>
</tr>
</tbody>
</table>
North Carolina Image vs. Competitors — Sports and Recreation

Base: Total Travelers

- Sports and Recreation: North Carolina 54%, Competitors 47%
- Great for exploring nature: North Carolina 60%, Competitors 55%
- Great for outdoor adventure sports: North Carolina 60%, Competitors 50%
- Great for beaches/watersports: North Carolina 59%, Competitors 47%
- Excellent state park facilities: North Carolina 55%, Competitors 50%
- Great for professional/college sports: North Carolina 53%, Competitors 47%
- Excellent fishing: North Carolina 53%, Competitors 50%
North Carolina Image vs. Competitors — Sports and Recreation (Cont’d)

<table>
<thead>
<tr>
<th>Category</th>
<th>North Carolina</th>
<th>Competitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sports and Recreation</td>
<td>47</td>
<td>54</td>
</tr>
<tr>
<td>Good trail system</td>
<td>44</td>
<td>51</td>
</tr>
<tr>
<td>Great spectator sports venues</td>
<td>38</td>
<td>41</td>
</tr>
<tr>
<td>Great for golfers</td>
<td>50</td>
<td>54</td>
</tr>
<tr>
<td>Good for motorsports/NASCAR events</td>
<td>43</td>
<td>55</td>
</tr>
<tr>
<td>Great for motorcycle touring</td>
<td>48</td>
<td>50</td>
</tr>
</tbody>
</table>

Base: Total Travelers

Percent Who Strongly Agree
North Carolina Image vs. Competitors — Sports and Recreation

Base: Total Travelers

Percent Who Strongly Agree

<table>
<thead>
<tr>
<th>State</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Florida</td>
<td>54</td>
</tr>
<tr>
<td>North Carolina</td>
<td>54</td>
</tr>
<tr>
<td>South Carolina</td>
<td>50</td>
</tr>
<tr>
<td>Virginia</td>
<td>47</td>
</tr>
<tr>
<td>Tennessee</td>
<td>46</td>
</tr>
<tr>
<td>Georgia</td>
<td>43</td>
</tr>
<tr>
<td>West Virginia</td>
<td>40</td>
</tr>
</tbody>
</table>
North Carolina Image Strengths vs. Virginia

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Difference in Percent Who Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Good for motorsports/NASCAR events</td>
<td>17</td>
</tr>
<tr>
<td>Great for professional/college sports</td>
<td>10</td>
</tr>
<tr>
<td>Excellent fishing</td>
<td>10</td>
</tr>
<tr>
<td>Good place to relax/escape from hectic life</td>
<td>8</td>
</tr>
<tr>
<td>Great for outdoor adventure sports</td>
<td>7</td>
</tr>
<tr>
<td>Great for golfers</td>
<td>7</td>
</tr>
<tr>
<td>Great for beaches/watersports</td>
<td>6</td>
</tr>
<tr>
<td>Interesting local people</td>
<td>6</td>
</tr>
<tr>
<td>Excellent climate overall</td>
<td>6</td>
</tr>
<tr>
<td>Warm, friendly people</td>
<td>6</td>
</tr>
<tr>
<td>Great spectator sports venues</td>
<td>6</td>
</tr>
</tbody>
</table>

Note: Circled attributes are some of the most important image hot buttons for travelers.
North Carolina Image Weaknesses vs. Virginia

- Noted for Civil War historic sites: -21
- Noted for its history: -20
- Well-known landmarks: -17
- Unique scenery: -8
- Great for winery/vineyard touring: -8
- Lots of things to see and do: -8
- A good contrast of seasons: -8
- Good for couples: -7

Note: Circled attributes are some of the most important image hot buttons for travelers.
North Carolina Image Strengths vs. Tennessee

Great for beaches/watersports: 40%
Diversity of landscapes: 31%
Great for golfers: 16%
Good for motorsports/NASCAR events: 12%
Beautiful gardens and parks: 9%
Popular with vacationers: 8%
Where I would feel comfortable: 7%
Excellent fishing: 6%
First-class hotels/resorts: 6%

Note: Circled attributes are some of the most important image hot buttons for travelers.
North Carolina Image Weaknesses vs. Tennessee

Base: Total Travelers

- Great live music: -19%
- Exciting nightlife/entertainment/shows: -9%
- Beautiful fall colors/foliage: -5%

Difference in Percent Who Strongly Agree
North Carolina Image Strengths vs. West Virginia

Note: Circed attributes are some of the most important image hot buttons for travelers.
North Carolina Image Strengths vs. West Virginia (Cont’d)

Base: Total Travelers

- Excellent shopping
- I often notice advertising
- Right distance for a weekend getaway
- Elegant, sophisticated restaurants
- Great spectator sports venues
- Good place for families
- First-class hotels/resorts
- Must see destination

Note: Circled attributes are some of the most important image hot buttons for travelers
North Carolina Image Weaknesses vs. West Virginia

Beautiful fall colors/foliage

Difference in Percent Who Strongly Agree

-40 -30 -20 -10 0

Base: Total Travelers
## North Carolina Image Strengths vs. South Carolina

<table>
<thead>
<tr>
<th>Image Strength</th>
<th>Difference in Percent Who Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beautiful fall colors/foliage</td>
<td>13</td>
</tr>
<tr>
<td>A good contrast of seasons</td>
<td>12</td>
</tr>
<tr>
<td>Diversity of landscapes</td>
<td>12</td>
</tr>
<tr>
<td>Great for outdoor adventure sports</td>
<td>11</td>
</tr>
<tr>
<td>Truly beautiful scenery</td>
<td>10</td>
</tr>
<tr>
<td>Great for professional/college sports</td>
<td>10</td>
</tr>
<tr>
<td>Good for motorsports/NASCAR events</td>
<td>9</td>
</tr>
<tr>
<td>Great spectator sports venues</td>
<td>8</td>
</tr>
<tr>
<td>Good trail system</td>
<td>7</td>
</tr>
<tr>
<td>Excellent state park facilities</td>
<td>6</td>
</tr>
<tr>
<td>Great local microbreweries and beer</td>
<td>6</td>
</tr>
<tr>
<td>Natural, unspoiled scenic beauty</td>
<td>6</td>
</tr>
<tr>
<td>Beautiful gardens and parks</td>
<td>5</td>
</tr>
</tbody>
</table>
North Carolina Image Weaknesses vs. South Carolina

Base: Total Travelers

- Excellent climate overall
- Great for beaches/watersports
- Noted for its history
- Children would especially enjoy
- Noted for Civil War historic sites

Difference in Percent Who Strongly Agree

-7
-6
-6
-5
-5

0
North Carolina Image Strengths vs. Georgia

Base: Total Travelers

- Great for beaches/watersports: 24
- Beautiful fall colors/foliage: 20
- Diversity of landscapes: 20
- Great for outdoor adventure sports: 19
- Good for viewing wildlife/birds: 14
- A good contrast of seasons: 14
- Excellent fishing: 14
- Natural, unspoiled scenic beauty: 13
- Truly beautiful scenery: 13
- Popular with vacationers: 13
- Safe place to travel in tourist areas: 13

Difference in Percent Who Strongly Agree
North Carolina Image Strengths vs. Georgia (Cont’d)

Base: Total Travelers

- Good place for families
- Good place to relax/escape from hectic life
- Great for exploring nature
- Good for motorsports/NASCAR events
- Where I would feel comfortable
- A real adventure
- A fun place
- Beautiful gardens and parks
- Interesting festivals/fairs/events
- Excellent state park facilities
- Good trail system
- I often notice advertising
- A place I would feel welcome

Note: Circled attributes are some of the most important image hot buttons for travelers
North Carolina Image Weaknesses vs. Georgia

Base: Total Travelers

Great for theater/arts/museums

Difference in Percent Who Strongly Agree

-40 -30 -20 -10 0

-40 -30 -20 -10 0

-5 0
North Carolina Image Strengths vs. Florida

- Beautiful fall colors/foliage: 48%
- Diversity of landscapes: 39%
- A good contrast of seasons: 38%
- Noted for Civil War historic sites: 29%
- Great for outdoor adventure sports: 23%
- Interesting small towns/villages: 21%
- Good trail system: 18%
- Natural, unspoiled scenic beauty: 15%
- Great for winery/vineyard touring: 15%

Base: Total Travelers
North Carolina Image Strengths vs. Florida (Cont’d)

Base: Total Travelers

- Truly beautiful scenery: 13%
- Affordable to eat there: 12%
- Interesting arts/crafts: 11%
- Affordable to get to: 11%
- Great for exploring nature: 11%
- Warm, friendly people: 11%
- Interesting local people: 11%
- Noted for its history: 10%

Difference in Percent Who Strongly Agree
North Carolina Image Weaknesses vs. Florida

Base: Total Travelers

Children would especially enjoy
I often notice advertising
Popular with vacationers
Exciting nightlife/entertainment/shows
Well-known destination
Great for beaches/watersports
Lots of things to see and do
First-class hotels/resorts
An exciting place

Difference in Percent Who Strongly Agree

Note: Circled attributes are some of the most important image hot buttons for travelers
North Carolina Image Weaknesses vs. Florida (Cont’d)

Note: Circed attributes are some of the most important image hot buttons for travelers
North Carolina’s Product Delivery
Another way to look at the image data is to compare the ratings by respondents who have not visited North Carolina to those who have visited recently. In effect then you are looking at expectations of a North Carolina visit (from the non-visitors) vs. product delivery (ratings of recent visitors).

In a perfect world the ratings are equal indicating all expectations are being met. When the experience falls short of expectations, there may be a problem with the product. When experience exceeds expectations as it does for North Carolina, it indicates that there is a great opportunity to educate those who do not know how wonderful North Carolina is.
Product Delivery Impacts

- The image ratings for North Carolina are much higher among North Carolina visitors on all dimensions as compared to those who have not visited.
- All of the Hot Buttons are positively impacted by the North Carolina experience.
North Carolina’s Product vs. Image

<table>
<thead>
<tr>
<th>Feature</th>
<th>Recent Visitors*</th>
<th>Never Visited</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exciting</td>
<td>57</td>
<td>43</td>
</tr>
<tr>
<td>Adult Destination</td>
<td>64</td>
<td>49</td>
</tr>
<tr>
<td>Family Atmosphere</td>
<td>60</td>
<td>45</td>
</tr>
<tr>
<td>Worry Free</td>
<td>65</td>
<td>46</td>
</tr>
<tr>
<td>Popular</td>
<td>58</td>
<td>54</td>
</tr>
<tr>
<td>Unique</td>
<td>58</td>
<td>54</td>
</tr>
<tr>
<td>Luxurious</td>
<td>59</td>
<td>50</td>
</tr>
<tr>
<td>Climate</td>
<td>59</td>
<td>44</td>
</tr>
<tr>
<td>Affordable</td>
<td>59</td>
<td>44</td>
</tr>
<tr>
<td>Sightseeing</td>
<td>58</td>
<td>45</td>
</tr>
<tr>
<td>Entertainment</td>
<td>61</td>
<td>46</td>
</tr>
<tr>
<td>Sports and Recreation</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* Visited in the past 2 years
Top Product Strengths vs. Image

Right distance for a weekend getaway 27
Not too far away to consider for a vacation 26
A place I would feel welcome 22
Good trail system 22
Great for exploring nature 21
Interesting arts/crafts 20
Excellent fishing 20
Beautiful fall colors/foliage 20
Diversity of landscapes 20
Must see destination 19
Affordable to get to 19
Where I would feel comfortable 19

* Circled attributes are some of the most important image hot buttons for travelers

Difference in Percent Who Strongly Agree
Top Product Strengths vs. Image (Cont’d)

* Circled attributes are some of the most important image hot buttons for travelers
Top Product Strengths vs. Image (Cont’d)

A good contrast of seasons  
Good for couples  
Interesting small towns/villages  
Safe place to travel in tourist areas  
**Good for an adult vacation**  
Great for locally grown specialty foods  
Good place for touring film/television locations  
**An exciting place**  
Excellent climate overall  
**A fun place**  
Natural, unspoiled scenic beauty  
Noted for Civil War historic sites

* Circled attributes are some of the most important image hot buttons for travelers

Difference in Percent Who Strongly Agree
Top Product Strengths vs. Image (Cont’d)

- Popular with vacationers
- Beautiful gardens and parks
- Unique vacation experience
- Good place for families
- Great for motorcycle touring
- A real adventure
- Well-known landmarks
- Lots of things to see and do
- Great for beaches/watersports
- Interesting local people
- Variety of dining options
- Well-known destination

* Circled attributes are some of the most important image hot buttons for travelers
North Carolina’s 2014 Advertising Campaign
Creative
Advertising Awareness
Advertising Impacts

- 45% of all the respondents recalled seeing at least one of North Carolina’s travel ads:
  - The awareness level is higher than the 2010 campaign which was 36%. In 2014, Tennessee - a new market, was included.
  - Awareness was similar in the primary* markets at 46% and the secondary* markets at 42%.
  - The Atlanta DMA and Washington, DC DMA have similar awareness levels for North Carolina travel ads, at 44% and 45% respectively.
  - The awareness is driven by digital advertising. Online creative was seen by 43% of the total respondents, 26% saw print creative, and 23% saw both the digital and the print.

* Primary markets include North and South Carolina, Tennessee Georgia, Virginia and Washington DC.
* Secondary markets include Maryland, Pennsylvania and Florida.
Awareness of 2014 versus 2010 Advertising

Base: Total Region

2014 Advertising

- 45% Aware
- 55% Unaware

2010 Advertising

- 36% Aware
- 64% Unaware
Awareness* by Advertising Market

* Saw at least one ad
Impact of the 2014 Advertising Campaign on North Carolina’s Image
Advertising Image Impacts

- The image factors most highly impacted by the campaign include *exciting, adult destination* and *affordable*.

- The Hot Buttons notably improved by the advertising are:
  - An exciting place
  - Lots of things to see and do
  - Must see destination
  - Unique vacation experience
  - A fun place

- The advertising had a positive impact on North Carolina’s image as a travel destination on every image factor.
Impact of 2014 Advertising on North Carolina's Image

Base: Total Travelers

- Exciting (55% Aware, 44% Unaware)
- Adult Destination (53% Aware, 43% Unaware)
- Family Atmosphere (56% Aware, 50% Unaware)
- Worry Free (59% Aware, 52% Unaware)
- Popular (54% Aware, 44% Unaware)
- Unique (55% Aware, 48% Unaware)
- Luxurious (51% Aware, 44% Unaware)
- Climate (56% Aware, 48% Unaware)
- Affordable (56% Aware, 47% Unaware)
- Sightseeing (55% Aware, 47% Unaware)
- Entertainment (58% Aware, 37% Unaware)
- Sports and Recreation (50% Aware, 46% Unaware)

Percent Who Strongly Agree

- Aware
- Unaware
North Carolina's Image — Exciting

Base: Total Travelers

* Circled attributes are some of the most important image hot buttons for travelers
North Carolina's Image — Adult Destination

Base: Total Travelers

Attitudes are some of the most important image hot buttons for travelers

* Circled attributes are some of the most important image hot buttons for travelers
North Carolina's Image — Family Atmosphere

Base: Total Travelers

* Circled attributes are some of the most important image hot buttons for travelers
North Carolina's Image — Worry Free

Base: Total Travelers

- Worry Free
- Where I would feel comfortable
- A place I would feel welcome
- Good place to relax/escape from hectic life
- Variety of dining options
- Safe place to travel in tourist areas

* Circled attributes are some of the most important image hot buttons for travelers
North Carolina's Image — Popular

Base: Total Travelers

Percent Who Strongly Agree

- Popular
  - Aware: 54%
  - Unaware: 44%

- Popular with vacationers
  - Aware: 58%
  - Unaware: 49%

- Well-known destination
  - Aware: 58%
  - Unaware: 51%

- I often notice advertising
  - Aware: 47%
  - Unaware: 32%
North Carolina's Image — Unique

* Circled attributes are some of the most important image hot buttons for travelers
North Carolina's Image — Luxurious

Base: Total Travelers

- **Luxurious**
  - Aware: 51%
  - Unaware: 44%

- **First-class hotels/resorts**
  - Aware: 55%
  - Unaware: 49%

- **Elegant, sophisticated restaurants**
  - Aware: 47%
  - Unaware: 39%
North Carolina's Image — Climate

Base: Total Travelers

- **Climate**
  - Percent Who Strongly Agree: 56
  - Awareness: 48
  - Unawareness: 51

- **Excellent climate overall**
  - Percent Who Strongly Agree: 54
  - Awareness: 44
  - Unawareness: 51

- **A good contrast of seasons**
  - Percent Who Strongly Agree: 58
  - Awareness: 44
  - Unawareness: 51
North Carolina's Image — Affordable

Base: Total Travelers

- Affordable: 47/56
- Excellent vacation value for the money: 43/53
- Affordable accommodations: 44/55
- Affordable to eat there: 50/55
- Affordable to get to: 47/58

Percent Who Strongly Agree

- Aware
- Unaware
North Carolina's Image — Sightseeing

Base: Total Travelers

- Sightseeing
- Lots of things to see and do
- Truly beautiful scenery
- Interesting cities
- Natural, unspoiled scenic beauty
- Beautiful gardens and parks
- Well-known landmarks
- Interesting small towns/villages

* Circled attributes are some of the most important image hot buttons for travelers
North Carolina's Image — Sightseeing (Cont’d)

Base: Total Travelers

- Sightseeing: 55%
- Noted for its history: 54%
- Good for viewing wildlife/birds: 59%
- Interesting arts/crafts: 53%
- Beautiful fall colors/foliage: 63%
- Noted for Civil War historic sites: 54%
- Great for winery/vineyard touring: 42%
- Good place for touring film/tv locations: 37%
- Great local microbreweries and beer: 42%

Percent Who Strongly Agree

- Aware
- Unaware
North Carolina's Image — Entertainment

Base: Total Travelers

- Entertainment
  - Aware: 46%
  - Unaware: 37%

- Excellent shopping
  - Aware: 46%
  - Unaware: 43%

- Interesting festivals/fairs/events
  - Aware: 56%
  - Unaware: 44%

- Exciting nightlife/entertainment/shows
  - Aware: 43%
  - Unaware: 32%

- Great live music
  - Aware: 45%
  - Unaware: 33%

- Great for theater/arts/museums
  - Aware: 40%
  - Unaware: 33%
North Carolina's Image — Sports & Recreation

Base: Total Travelers

Percent Who Strongly Agree

- Sports and Recreation
- Great for exploring nature
- Great for outdoor adventure sports
- Great for beaches/watersports
- Excellent state park facilities
- Great for professional/college sports

Aware

Unaware
North Carolina's Image — Sports & Recreation (Cont’d)

Base: Total Travelers

Sports and Recreation

Excellent fishing

Good trail system

Great spectator sports venues

Great for golfers

Good for motorsports/NASCAR events

Great for motorcycle touring

Percent Who Strongly Agree

Aware

Unaware
Great local microbreweries and beer
I often notice advertising
Great for motorcycle touring
Interesting festivals/fairs/events
Good trail system
An exciting place
Great live music
Exciting nightlife/entertainment/shows
Lots of things to see and do
Great for winery/vineyard touring
A real adventure

* Circled attributes are some of the most important image hot buttons for travelers
Attributes for Which the Campaign Had the Greatest Impact (Cont’d)

- Affordable accommodations
- Must see destination
- Excellent vacation value for the money
- Right distance for a weekend getaway
- Unique vacation experience
- Excellent fishing
- Affordable to get to
- Warm, friendly people
- Excellent state park facilities
- A fun place
- Natural, unspoiled scenic beauty

* Circled attributes are some of the most important image hot buttons for travelers
Short-Term Impacts of the Advertising
Advertising Impacts

- Based on Longwoods methodology, we estimate that the investment of $1.16*** million dollars generated in the short term:
  - 1.35 million new visitors to North Carolina who would not otherwise have come
  - these incremental visitors spent approximately $213* million in North Carolina
  - the incremental spending resulted in $16.9 million in incremental state and local taxes** or a return on investment of 15:1
  - The return on investment for the primary markets is 14:1 and secondary markets 20:1.

*Based on Avg. Spending estimates from 2013 TNS Travels America
**Based on State + Local tax rates from North Carolina (7.93%)
***This spending represents a sample of March through June NC Brand only advertising, excluding co-ops
Advertising Impacts

- In addition to the short term impacts, we estimate that the advertising has influenced the planning of a further 4.6 million trips to North Carolina in 2015.
- While not all of these planned trips will happen, we expect that a significant percentage will convert, adding significantly to the return on North Carolina’s investment in Tourism Marketing.
Short-Term Impacts of The Advertising

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ad Investment</td>
<td>$1,156,863</td>
</tr>
<tr>
<td>Incremental Visits</td>
<td>1,396,702</td>
</tr>
<tr>
<td>Incremental Spending</td>
<td>$213.0 M</td>
</tr>
<tr>
<td>State and Local Taxes</td>
<td>$16.9M</td>
</tr>
<tr>
<td>Spending ROI*</td>
<td>$184</td>
</tr>
<tr>
<td>Total Tax ROI**</td>
<td>$15</td>
</tr>
</tbody>
</table>

* Incremental visitor spending per ad $ invested.
  Spending is based on $203 per person for overnight trips and $70 per person for day trips

** Incremental taxes per ad $ invested.
## Campaign Efficiency

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Incremental Visits</td>
<td>1,396,702</td>
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<tr>
<td>Ad Investment</td>
<td>$1,156,863</td>
</tr>
<tr>
<td>Ad $’s per Trip</td>
<td>$1.21</td>
</tr>
<tr>
<td>Trips per Ad $</td>
<td>.83</td>
</tr>
</tbody>
</table>
Longer-Term Impact of Advertising — Intent to Visit North Carolina

<table>
<thead>
<tr>
<th></th>
<th>Intend to Visit North Carolina in Next 12 Months</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overnight</td>
<td>2,514,121</td>
</tr>
<tr>
<td>Day</td>
<td>2,096,427</td>
</tr>
<tr>
<td><strong>Total Intenders</strong></td>
<td><strong>4,610,548</strong></td>
</tr>
</tbody>
</table>
Comparison to 2010 Results
## Visitor Spending & Taxes Due To Advertising

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ad Investment</td>
<td>$1.2 M</td>
<td>$1.2 M</td>
</tr>
<tr>
<td>Incremental Trips</td>
<td>1.35 M</td>
<td>1.17 M</td>
</tr>
<tr>
<td>Generated Incremental:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spending</td>
<td>$213.0 M*</td>
<td>$234.1 M</td>
</tr>
<tr>
<td>Taxes</td>
<td>$16.9 M**</td>
<td>$20.3 M</td>
</tr>
<tr>
<td>Return on Investment</td>
<td>15:1</td>
<td>17:1</td>
</tr>
</tbody>
</table>

*Based on Avg. Spending estimates from 2013 TNS Travels America
**State+Local tax rate estimate from North Carolina (7.93%)
Appendix: Impact of Ads on Trip Planning and Visiting www.visitnc.com
Impact of Ads on Trip Planning and www.visitnc.com

- After seeing the ads, more than six out of ten did not use any other information sources. Use of the internet was the highest information source at 23%.

- 16% of the respondents visited the website. Of those who visited, over half visited 2-4 times.

- Internet search was the primary method (69%) to be introduced to the website.

- The main reason (43%) for visit was to find travel information.

- Almost two-thirds of visitors found the information very useful.
After Seeing the Ads - Information Sources Used for Planning - Detail

A hotel or resort: 10%
Hotel websites: 10%
www.visitnc.com: 9%
Travel guide books: 8%
Travel articles in magazines: 7%
Advice from relatives or friends: 7%
Magazine advertising: 6%
Personal experience from past visit(s): 6%
Television travel shows: 5%
Other online sources: 5%
Television advertising: 5%
A travel agent: 4%
Social Media (ie: Facebook, Twitter): 4%
Other destination websites: 4%
An airline/commercial carrier: 4%
Airline websites: 4%

Percent
After Seeing the Ads - Information Sources Used for Planning – Detail (Cont’d)

<table>
<thead>
<tr>
<th>Information Source</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online booking engines (eg. Expedia)</td>
<td>3</td>
</tr>
<tr>
<td>A company that specializes in group tours</td>
<td>3</td>
</tr>
<tr>
<td>A government tourism office</td>
<td>3</td>
</tr>
<tr>
<td>Local visitors bureau/chamber of commerce</td>
<td>3</td>
</tr>
<tr>
<td>Newspaper travel section</td>
<td>3</td>
</tr>
<tr>
<td>Newspaper advertising</td>
<td>3</td>
</tr>
<tr>
<td>Other magazine articles</td>
<td>3</td>
</tr>
<tr>
<td>Editorials</td>
<td>2</td>
</tr>
<tr>
<td>A toll-free number</td>
<td>2</td>
</tr>
<tr>
<td>Radio advertising</td>
<td>2</td>
</tr>
<tr>
<td>An association/club</td>
<td>2</td>
</tr>
<tr>
<td>Car rental websites</td>
<td>2</td>
</tr>
<tr>
<td>An auto club</td>
<td>2</td>
</tr>
</tbody>
</table>
Number of Times Visited Travel Website visitnc.com in 2014

Base: Visited visitnc.com

- **Once**: 21
- **2-4 times**: 55
- **5-7 times**: 17
- **8-10 times**: 3
- **More than 10 times**: 4

Percent

0 20 40 60
How Learn About visitnc.com

Base: Visited visitnc.com

Advertisements/commercials about North Carolina: 27%
Banner advertising: 26%
Family/friends: 24%
Link from other other websites: 22%
Newspaper/magazine articles and TV programs: 19%
Travel agent: 17%
Travel brochures/guides: 17%
Other: 5%

Internet search is 69%
Main Purpose for visiting visitnc.com

Base: Visited visitnc.com

- **Find travel information**: 43%
- **Choose a destination to visit**: 19%
- **Browse upcoming event**: 15%
- **Plan a Trip**: 11%
- **Order a Travel Guide**: 8%
- **Other**: 4%
How Useful Was visitnc.com Website

Base: Visited visitnc.com

- Very useful: 65%
- Somewhat useful: 35%
- Not very/Not at all useful: < 0.5%