



2009 North Carolina Regional Travel Summary

**A publication of the North Carolina Division of
Tourism, Film & Sports Development**

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2009 North Carolina Regional Travel Summary

The North Carolina Division of Tourism, Film and Sports Development has contracted with the research company TNS for four years to perform demographic profiles and volume analyses on the North Carolina travel and tourism industry. TNS is the world's largest provider of custom research and analysis, serving all segments of the travel industry. The company has over 13,000 full-time employees worldwide and offices in more than 80 countries.

The research program, titled "TravelsAmerica" conducts over 10,000 Internet-based interviews among past 12-month travelers who have traveled more than 50 miles from their homes (excluding commuters). From this sample, past-month data from 4,500 – 5,500 past month travelers is also collected for even greater insights. Information collected includes: purpose of trip, mode of travel, travel party characteristics, places visited, number of nights, accommodations, activities, spending, and demographics. Data collected are weighted to match US Census variables, market size, age of household head, household income, and household size.

The purpose of this regional report is to provide each region with research data specific to their geographic area. The report is divided into three sections: Mountain, Piedmont, and Coast. Where applicable, regional statistics are compared to statewide statistics to provide regions with information relevant to how they compare to NC travel in general. As well, in the final section of the report, a comparison between the three regions is offered. At the end of the report, an appendix offers definitions of key travel terms.

2009 North Carolina Regional Travel Summary

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2009 Domestic Coastal Region Total Travel

Summary

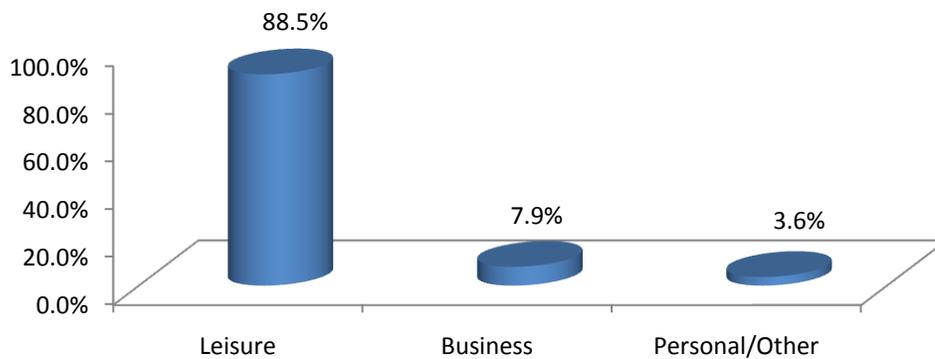
- ◆ In 2009, more than 20 percent of North Carolina visitors traveled to North Carolina’s Coastal Region, approximately 7.4 million person-trips. For marketing purposes, the Coastal Region is made up of twenty-eight most eastern counties of North Carolina.
- ◆ Eighty-seven percent of all domestic visitors came to the Coastal Region for pleasure purposes, while eight percent of visitors came to conduct business (includes meeting/convention). The remaining five percent indicated personal business or “other” reason for visiting the coast.
- ◆ The summer (June - August) was the most popular season for travel to North Carolina’s Coastal Region, with forty-eight percent of all 2009 coastal visitors. Spring (March-May) and fall (September - November) followed with twenty-one percent of coastal visitors each. The winter season (December-February) was the least visited with ten percent. July was the single largest month for coastal travel with almost eighteen (17.7%) percent.
- ◆ Overnight visitors to the Coastal Region spent an average of 4.4 nights in the region in 2009.
- ◆ Fifty-one percent of Coastal Region visitors stayed in a private home while thirty-one percent lodged at a hotel/motel. Almost thirteen (12.5%) percent stayed in a timeshare or condo.
- ◆ The average travel party size for all Coastal Region visitors was 3.2 people. Thirty-five percent of travel parties to the region included children in the party.
- ◆ Ninety percent of overnight travelers to the Coastal Region drove (includes personal automobile, rental, motorcycle and RV), while seven percent traveled by air.
- ◆ In 2009, the average household trip expenditure in the Coastal Region was \$809. The average household trip expenditure for overnight visitors to the Coastal Region was \$912. Daytrip parties to the Coast region spent approximately \$146 per visit.
- ◆ The top states of origin of *overnight* visitors to the Coastal Region were North Carolina (42.9%), Virginia (13.9%), Maryland (5.4%), New Jersey (5.0%), Pennsylvania (4.4%), and Ohio (4.0%).
- ◆ Sixty-one percent of the households that traveled to North Carolina’s Coastal Region in 2009 had a household income over \$50,000.
- ◆ In 2009, Raleigh/Durham/Fayetteville (15.0%) was the top advertising market of origin for *overnight* travelers to the Coastal Region, followed by Charlotte (8.1%), Washington DC (7.7%), Greensboro/High Point/Winston Salem (7.7%), Norfolk/Portsmouth/Newport News (7.3%), and New York (6.1%).

Coastal Region Overnight Visitor Profile

Main Purpose of Visit

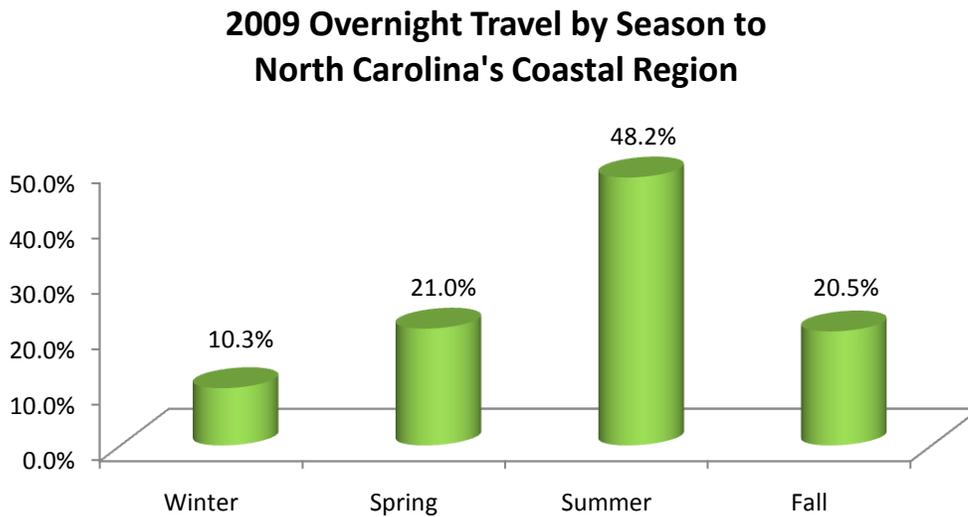
In 2009, almost nine out of ten (88.5%) of domestic overnight visitors came to the Coastal Region for leisure purposes, which included visiting friends and relatives, outdoor recreation and entertainment/sightseeing. Nearly eight percent (7.9%) of domestic overnight visitors came for general business, convention, seminar or other group meeting, while over three percent traveled to the Coastal Region to conduct personal or “other” business.

2009 Primary Purpose of Overnight Trip to North Carolina's Coastal Region



Travel Volume by Season

When examining visitation based on the typical seasonal schedule, the summer (June through August) with over forty-eight percent, was the most popular season of the year for overnight travel to North Carolina’s Coastal Region. The spring (March through May) and fall (September through November) were next with twenty-one percent each, followed by winter (December through February) with ten percent.



Average Length of Stay

In 2009, an average of 4.4 nights were spent by visitors to North Carolina’s Coastal Region.

Travel Party Size

The average travel party size for all Coastal Region overnight visitors was 3.2 people.

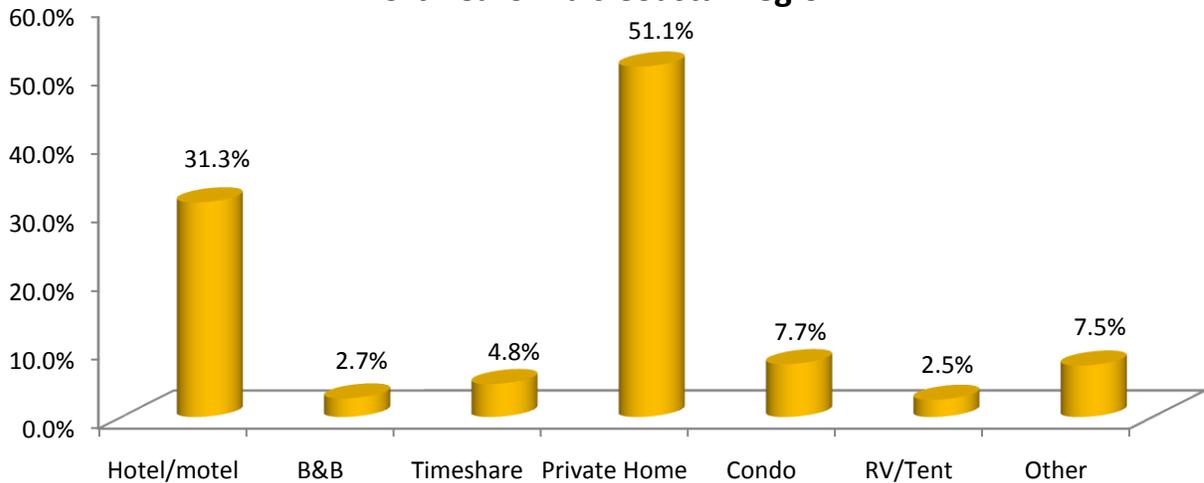
Children on Trip

Thirty-five percent of overnight visitor parties to the Coastal Region included children. Among those who traveled with children, the average number of children on trips was 2.0.

Lodging Used in Coastal Region

In 2009, over one-half of Coastal Region visitors stayed in a private home (51.1%). Thirty-one percent lodged at a hotel/motel and eight percent stayed in a condo.

2009 Lodging by Overnight Visitors to North Carolina's Coastal Region

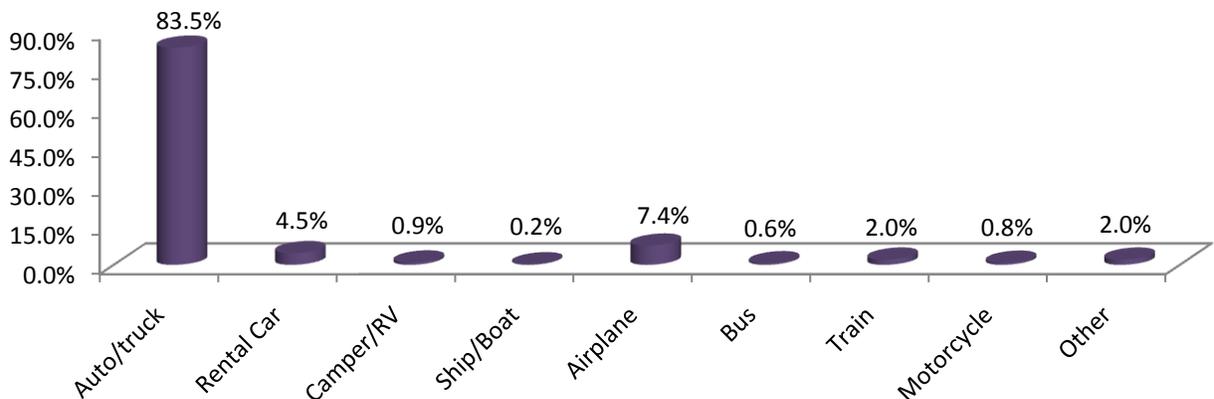


*percentages add to more than 100% due to multiple responses

Mode of Transportation

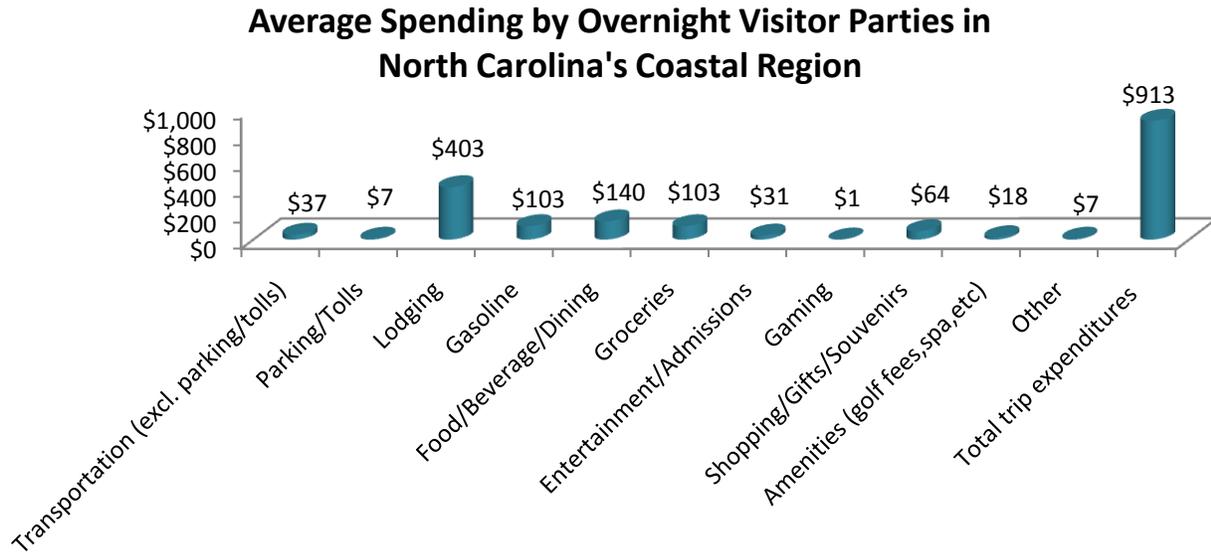
In 2009, the personal auto was by far the dominant form of transportation (83.5%) to the Coastal Region, while seven percent traveled by air.

2009 Primary Mode of Transportation to North Carolina's Coastal Region



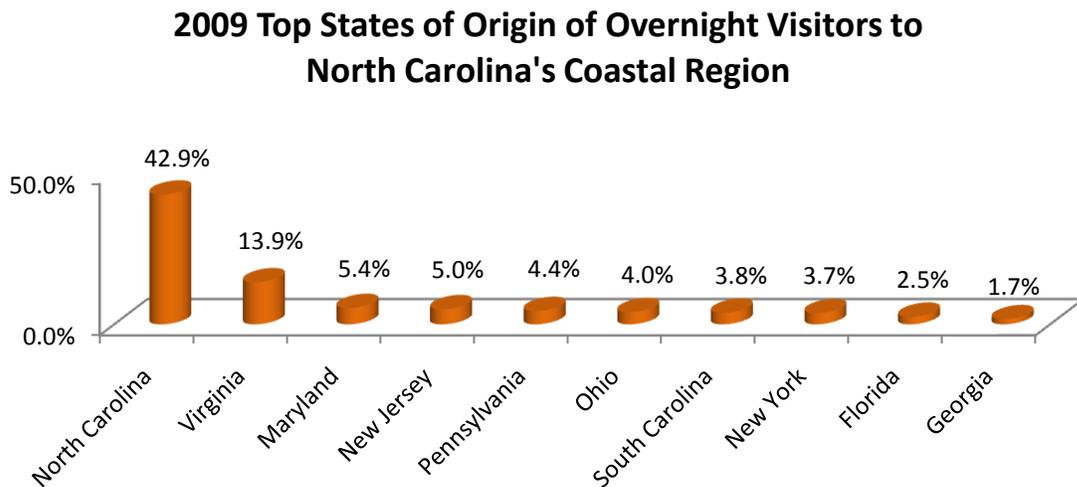
Amount Spent in Coastal Region

The average overnight visitor party spending in the Coastal Region was \$913.



Origin of Visitors

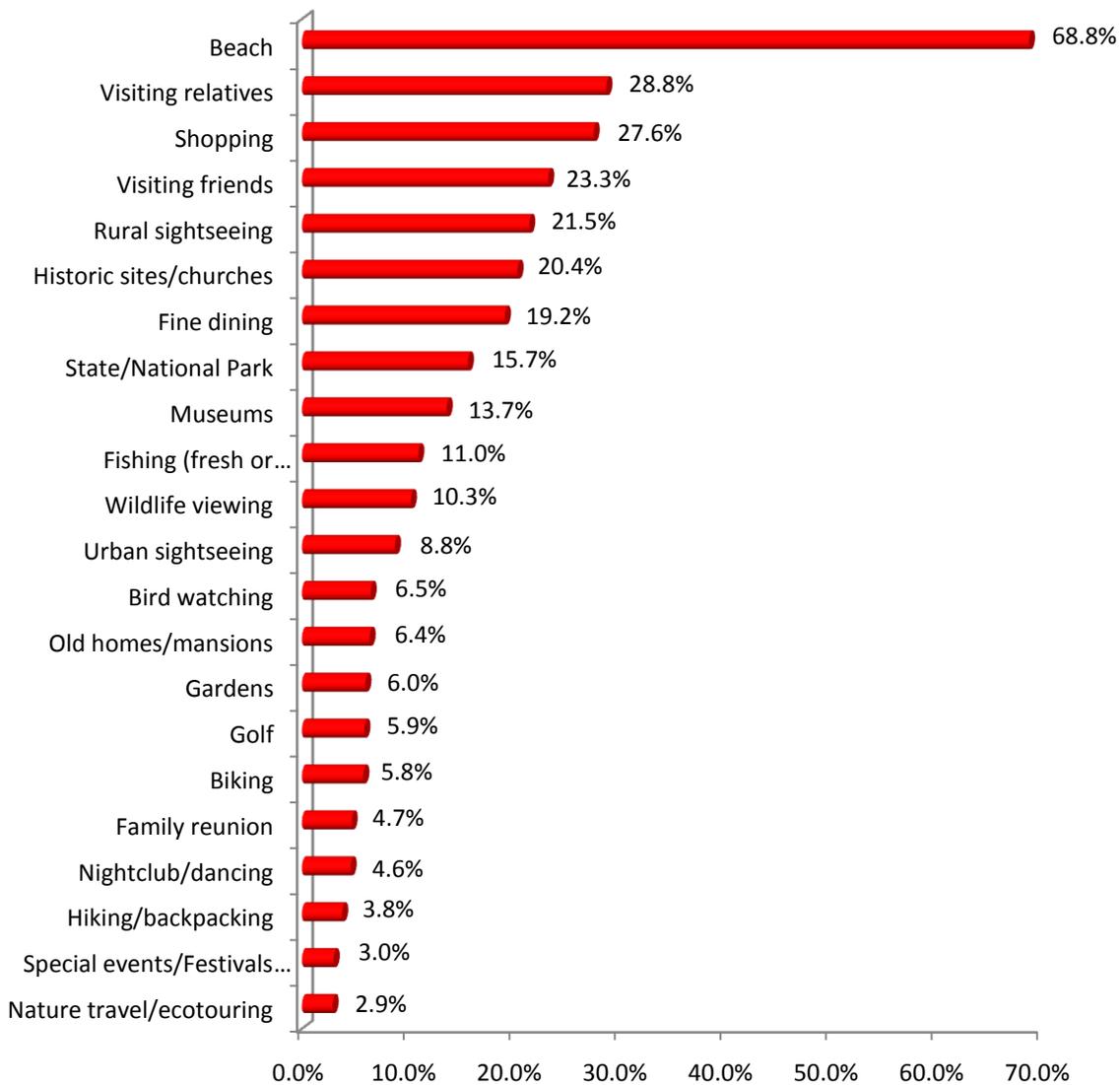
In 2009, the top states of origin for Coastal Region overnight visitors included North Carolina (42.9%), Virginia (13.9%), Maryland (5.4%), New Jersey (5.0%) and Pennsylvania (4.4%).



Activities

Over two-thirds (68.8%) of the overnight visitors to North Carolina’s Coastal Region went to a beach while visiting the region. Over one-fourth visited relatives (28.8%) and shopped (27.6%) while visiting North Carolina’s coast. Other popular activities included visiting friends (23.3%), rural sightseeing (21.5%), visiting historic sites/churches (20.4%), fine dining (19.2%), and visiting state/national parks (15.7%).

2009 Activities Participated in by Overnight Visitors to North Carolina's Coastal Region



Demographic Profile of North Carolina Overnight Visitors

The North Carolina coastal region overnight visitor gender breakdown is sixty-two percent female and thirty-eight percent male. More than half (62.6%) of the visitors are married and just over one-fifth of the region's visitors are divorced, widowed or separated.

The largest proportion of North Carolina coastal region overnight visitors classify themselves as white (89.4%), and over seven percent classify themselves as black/African American.

Over half (60.7%) of Coastal Region overnight visitor parties have a household head with a college degree or higher. The average Coastal region visitor is 46 years old, with almost one-half (47.4%) being 45 years old or older.

Over forty percent (41.4%) of the visitor parties that traveled to North Carolina's Coastal Region in 2009 had a household income \$75,000 or over. Twelve percent had a household income of over \$125,000.

2009 Top Advertising Markets

In 2009, the top advertising markets sending overnight visitors to **North Carolina's Coastal Region** were Raleigh-Durham-Fayetteville (15.0%), Charlotte (8.1%), Washington DC (7.7%), Greensboro-Winston-Salem-High Point (7.7%), and Norfolk-Portsmouth-Newport News (7.3%). Advertising markets correspond with Nielsen's Designated Market Areas (DMAs).

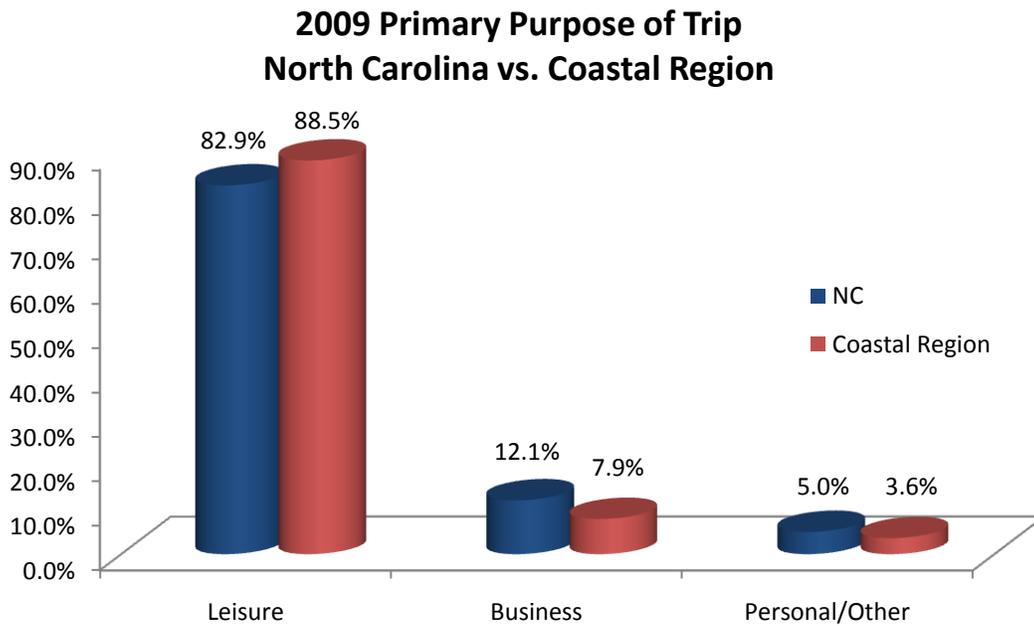
Top Advertising Markets of Origin for 2009 *Overnight* Coastal Region Visitors

<i>DMA of Origin</i>	<i>Percent of Total Visitors to Coastal Region</i>	<i>Coastal Market Share of NC Visitors from DMA</i>
Raleigh-Durham (Fayetteville)	15.0%	21.8%
Charlotte	8.1%	17.6%
Washington DC (Hagerstown, MD)	7.7%	27.5%
Greensboro-High Point-Winston Salem	7.7%	19.7%
Norfolk-Portsmouth-Newport News, VA	7.3%	39.2%
New York, NY	6.1%	25.3%
Greenville-New Bern-Washington	5.8%	27.7%
Philadelphia, PA	3.5%	31.1%
Richmond-Petersburg, VA	3.3%	35.1%
Wilmington	2.6%	27.0%
Roanoke-Lynchburg	2.3%	20.0%
Greenville-Spartanburg-Asheville-Anderson	2.0%	7.5%
Cleveland-Akron (Canton)	1.8%	50.0%
Baltimore	1.7%	23.3%
Charleston, SC	1.7%	31.8%

Note: Advertising markets defined by Nielsen's Designated Market Area (DMA)

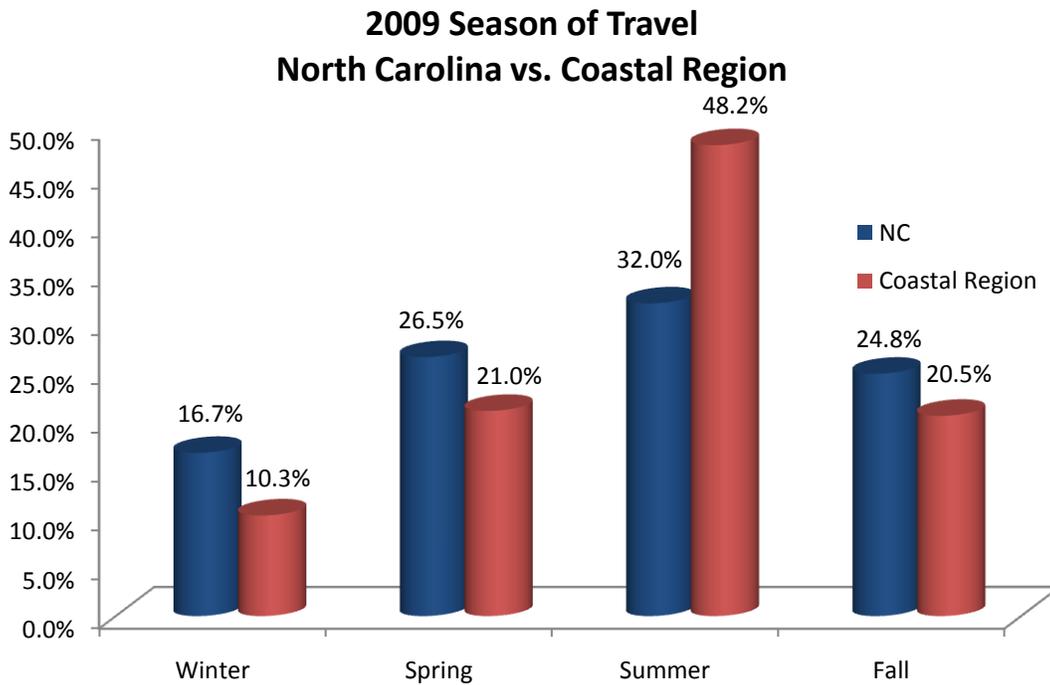
2009 Coastal Region versus North Carolina

North Carolina’s Coastal Region had a larger share of overnight visitors travel to the region for leisure reasons than North Carolina as a state (83% North Carolina vs. 89% Coastal Region). At the same time, North Carolina’s share of business/convention travelers was a third larger the proportion for the Coastal Region (12% North Carolina vs. 8% Coastal Region).



Travel Volume by Season

During the summer season (June through August) the Coastal Region had a significantly higher percentage of overnight visitors than North Carolina as a whole, while North Carolina had higher percentages of visitors in the spring, fall and winter seasons.



Average Length of Stay

In 2009, an average of 4.4 nights were spent by visitors to North Carolina’s Coastal Region, while the North Carolina overnight visitor stayed an average of 3.3 nights.

Travel Party Size

The average travel party size for all Coastal Region overnight visitors was 3.2 people, while the average party size of the North Carolina visitor was 2.6 people.

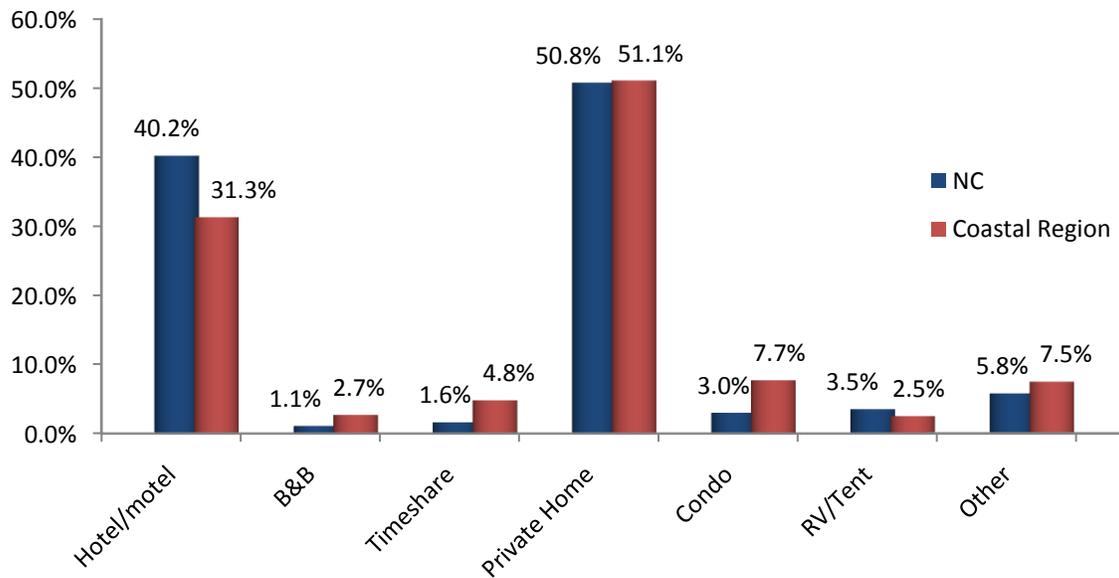
Children on Trip

Thirty-five percent of overnight visitor parties to the Coastal Region included children. Twenty-seven percent of overnight North Carolina visitor parties included children.

Lodging Type

Both Coastal Region overnight visitors and North Carolina visitors in general are more likely to stay in a private home or hotel/motel than other types of lodging. However, North Carolina visitors have a higher proportion for hotel/motel (40% North Carolina vs. 31% Coastal Region).

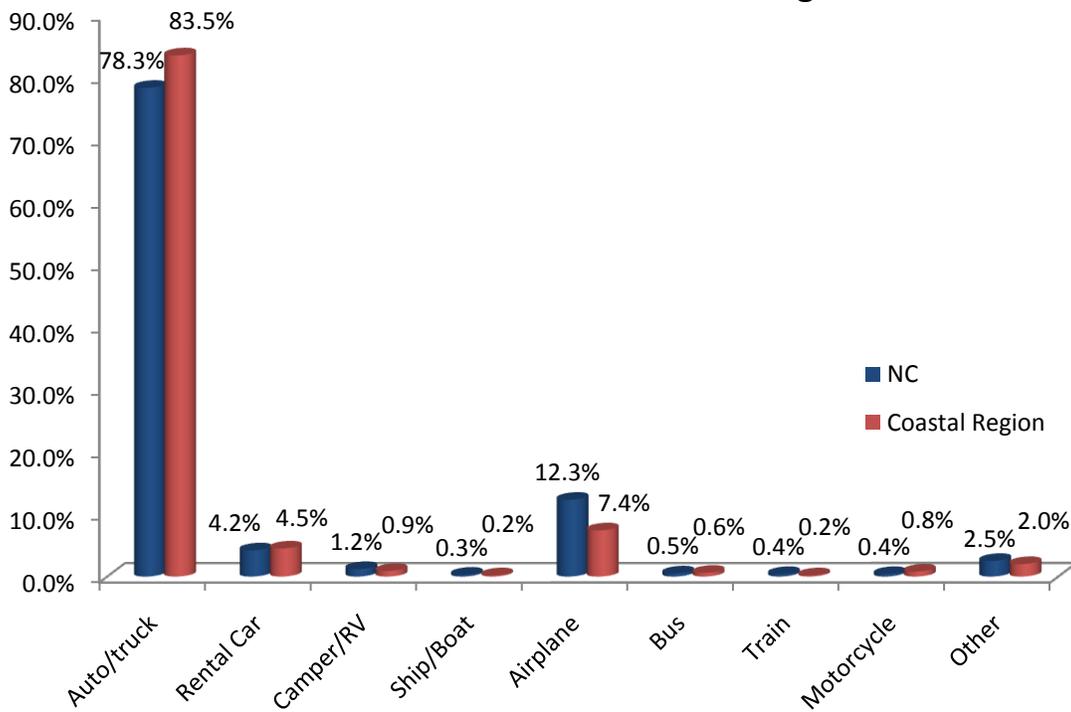
2009 Lodging by Overnight Visitors to North Carolina vs. Coastal Region



Mode of Transportation

A higher percentage of travelers to the Coastal Region drove to their destination than all North Carolina visitors (78% North Carolina vs. 84% Coastal Region), while a higher percentage of travelers to North Carolina flew to their destination than Coastal Region visitors (12% North Carolina vs. 7% Coastal Region).

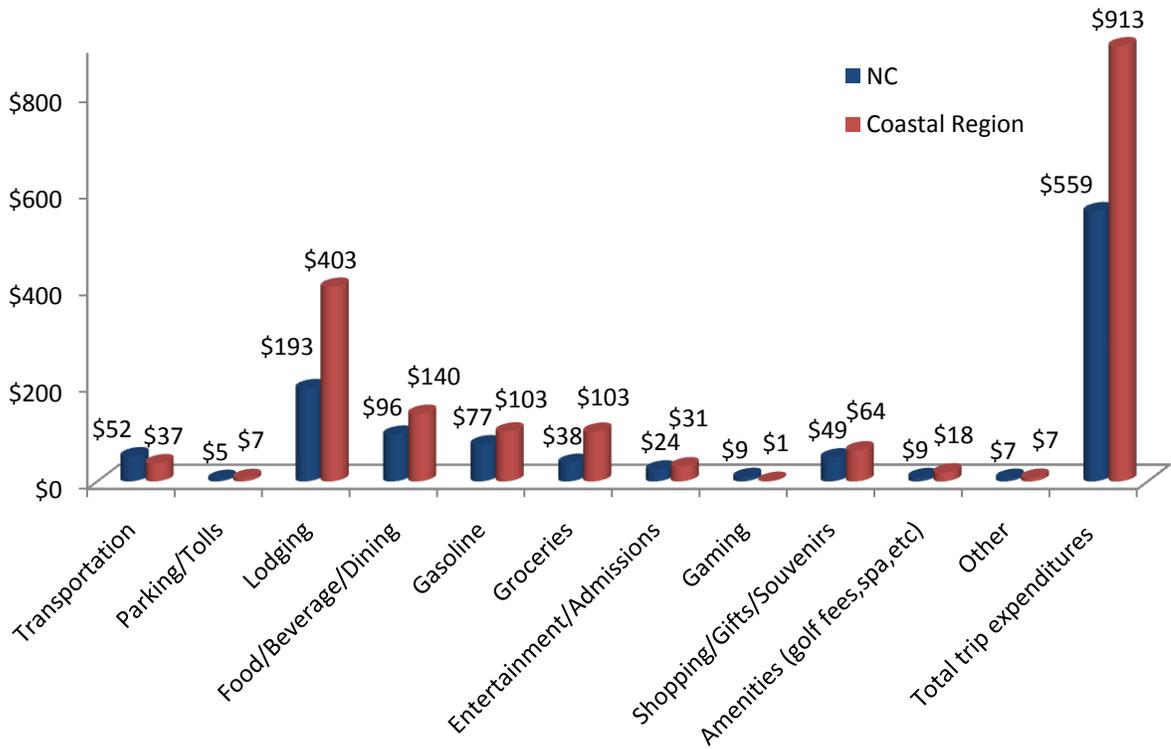
**2009 Primary Transportation by Overnight Visitors
North Carolina vs. Coastal Region**



Amount Spent in Coastal Region

The average overnight visitor party spending in the Coastal Region was \$913, much higher than the state average party spending of \$559.

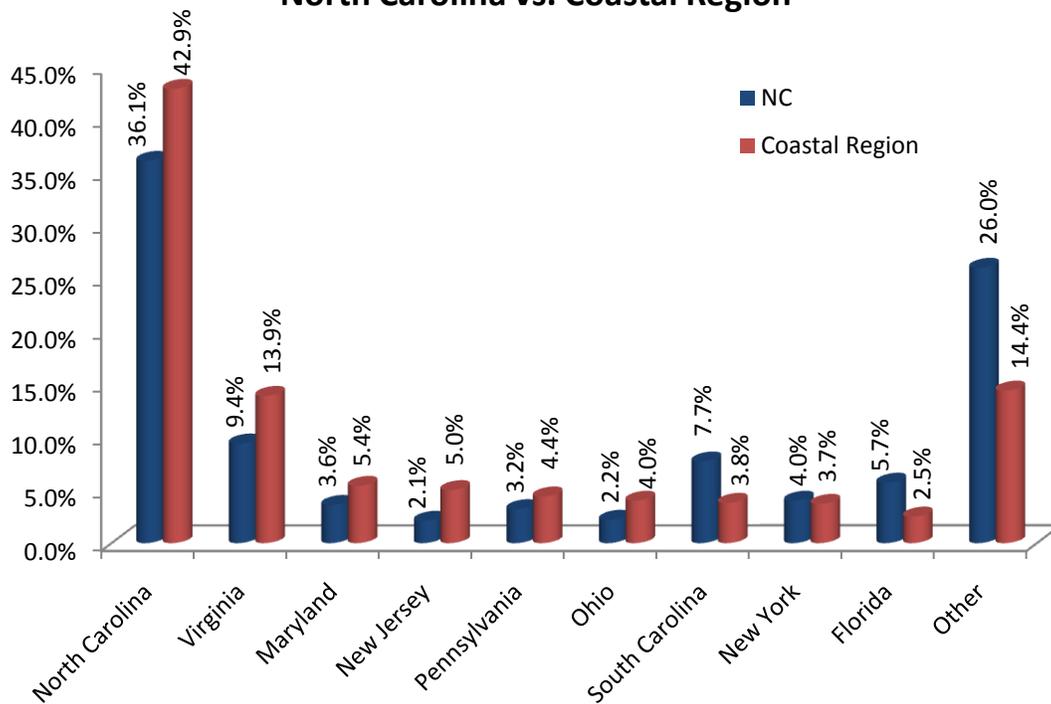
**Average Spending by Overnight Visitor Parties
North Carolina vs. Coastal Region**



Origin of Overnight Visitors

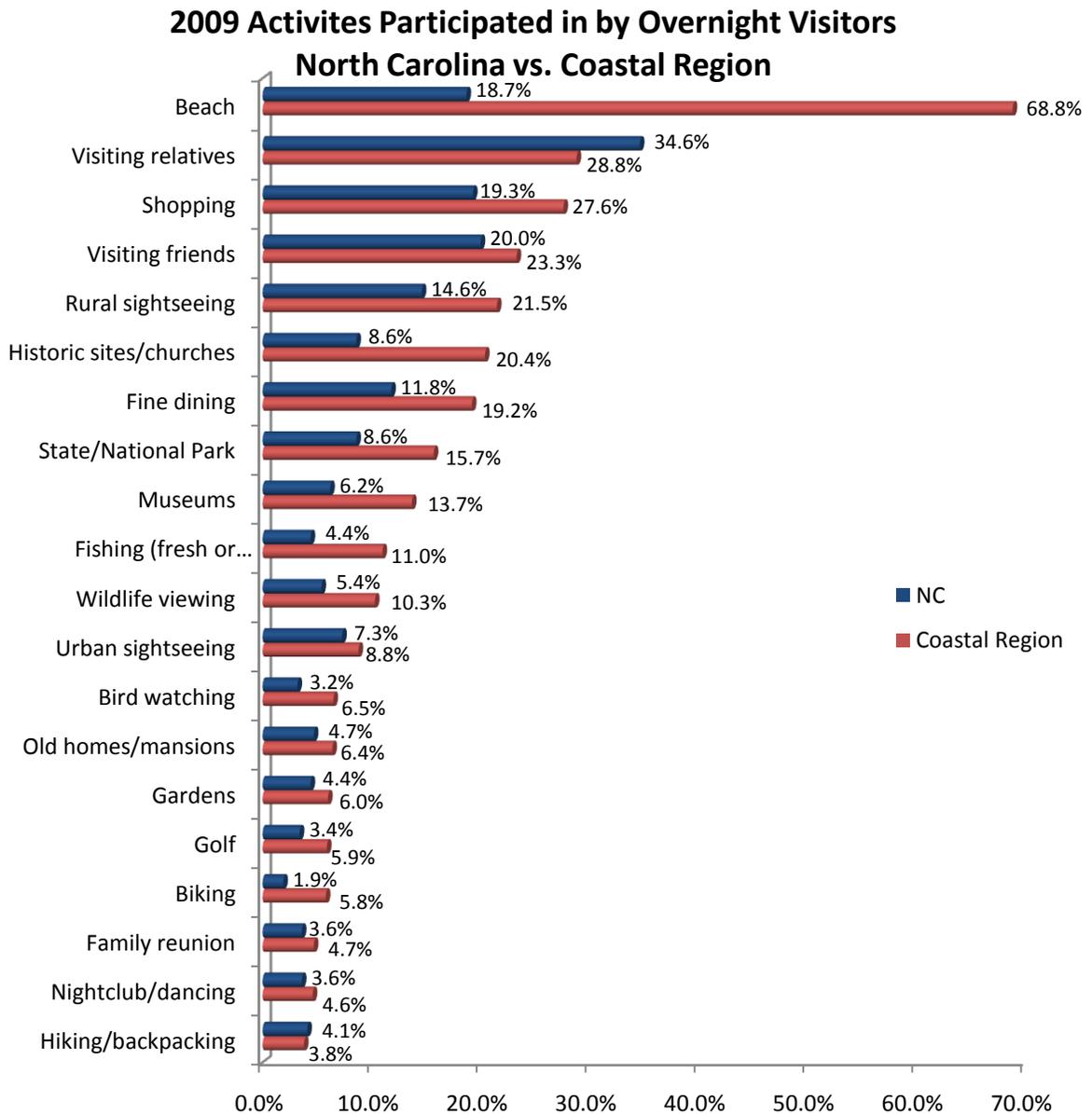
The top states of origin were very similar in 2008, with slight variances between states. The coastal region saw a higher percentage of in-state visitors and Virginia residents than the state as a whole; while the state saw a larger proportion of visitors from South Carolina and Florida than the coastal region.

**2009 Top States of Origin of Overnight Visitors
North Carolina vs. Coastal Region**



Activities

Compared to all North Carolina overnight travelers, the Coastal Region naturally had a larger share of visitors go to the beach/waterfront (19% North Carolina vs. 69% Coastal Region). The region also had a larger proportion of visitors who shopped (19% North Carolina vs. 28% Coastal Region), visit historic sites/churches (9% North Carolina vs. 20% Coastal Region), participated in rural sightseeing (15% North Carolina vs. 22% Coastal Region) and visit a national/state park (9% North Carolina vs. 16% Coastal Region).



Demographic Profile for Overnight Visitor Parties

	North Carolina	Coastal Region
Average age of household head	45.5 years of age	44.6 years of age
Education of Household Head		
High school or less	16.0%	13.2%
Some college - no degree	24.4%	25.1%
Completed college	41.2%	44.7%
Post Graduate College	18.5%	16.0%
Annual Household Income		
Less than \$25,000	13.6%	9.8%
\$25,000-\$49,999	25.2%	26.9%
\$50,000-\$74,999	22.1%	21.9%
\$75,000 & over	39.1%	41.4%
Marital Status		
Married	62.1%	62.6%
Never married	17.9%	16.4%
Divorced, widowed, separated	20.1%	21.0%
Ethnicity		
White	84.2%	89.4%
Black/African American	11.3%	7.1%
Asian or Pacific Islander	1.2%	1.6%
Other	3.3%	1.9%

2009 Top Advertising Markets

While the top ten advertising markets sending visitors to North Carolina’s Coastal Region are similar to the top ten advertising markets for the state of North Carolina, there are visitor shares from advertising markets that differ slightly; such as Norfolk-Portsmouth-Newport News, VA (3% North Carolina vs. 7% Coastal Region), and Raleigh-Durham (12% North Carolina vs. 15% Coastal Region).

Top Advertising Markets of Origin for 2009 Overnight Coastal Region Visitors VS. North Carolina Visitors

<i>DMA of Origin</i>	<i>Percent of Total Visitors to Coastal Region</i>	<i>Percent of Total Visitors to North Carolina</i>
Raleigh-Durham (Fayetteville)	15.0%	12.3%
Charlotte	8.1%	8.3%
Washington DC (Hagerstown, MD)	7.7%	5.0%
Greensboro-High Point-Winston Salem	7.7%	7.2%
Norfolk-Portsmouth-Newport News, VA	7.3%	3.4%
New York, NY	6.1%	4.3%
Greenville-New Bern-Washington	5.8%	3.8%
Philadelphia, PA	3.5%	2.0%
Richmond-Petersburg, VA	3.3%	1.7%
Wilmington	2.6%	1.7%
Roanoke-Lynchburg	2.3%	2.1%
Greenville-Spartanburg-Asheville-Anderson	2.0%	4.9%
Cleveland-Akron (Canton)	1.8%	0.6%
Baltimore	1.7%	1.4%

Note: Advertising markets defined by Nielsen’s Designated Market Area (DMA)

2009 Domestic Piedmont Region Travel

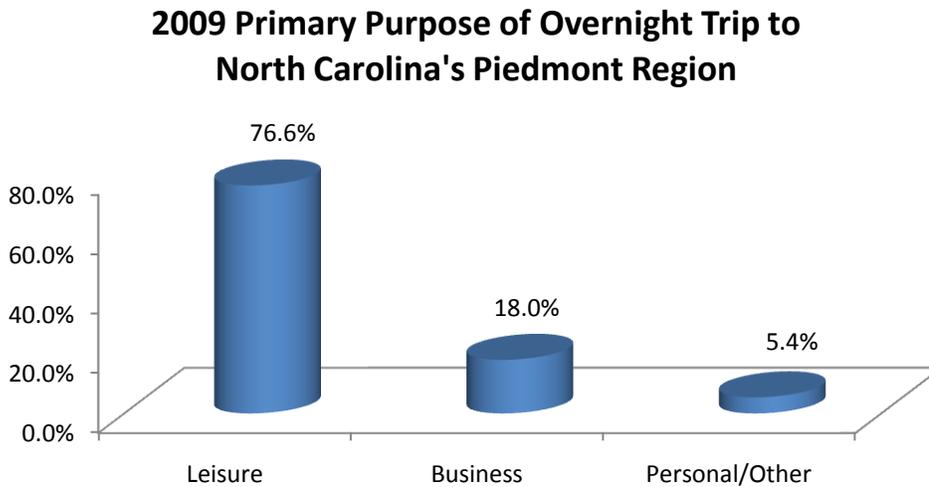
Summary

- ◆ In 2009, fifty-nine percent of North Carolina visitors traveled to North Carolina’s Piedmont Region, approximately 21.2 million person-trips. For marketing purposes, the Piedmont Region is made up of the 49 most central counties of North Carolina.
- ◆ Seventy-seven percent of domestic visitors came to the Piedmont Region for pleasure purposes, while eighteen percent of visitors came to conduct business (includes meeting/convention). The remainder visited for personal business or “other” reasons.
- ◆ Travel to the Piedmont Region of North Carolina was fairly consistent throughout the seasons. However, the spring (March - May) had a slightly higher proportion of visitors, with twenty-nine percent of all 2009 piedmont visitors. Summer (June - August) followed with twenty-eight percent of piedmont visitors, followed by fall (September - November) with twenty-five percent and winter (December - February) with nineteen percent. May was the single largest month for piedmont travel with twelve percent.
- ◆ Overnight visitors to the Piedmont Region spent an average of 3.2 nights in the region.
- ◆ Fifty-one percent of Piedmont Region visitors stayed in a private home while forty-seven percent of visitors lodged in a hotel/motel.
- ◆ The average travel party size for all Piedmont Region visitors was 2.4 people. Twenty-four percent of travel parties to the region included children in the party.
- ◆ Seventy-six percent of all travelers to the Piedmont Region drove (includes personal automobile and rental), while twenty percent traveled by air.
- ◆ In 2009, the average household trip expenditure in the Piedmont Region was \$436. The average household trip expenditure for overnight visitors to the Piedmont Region was \$535. Daytrip parties to the Piedmont region spent approximately \$204 per visit in 2009.
- ◆ The top states of origin of *overnight* visitors to the Piedmont Region in 2009 were North Carolina (29.3%), Georgia (8.7%), Virginia (8.4%), New York (6.2%), South Carolina (6.2%), and Florida (5.7%).
- ◆ Sixty-four percent of the households that traveled to North Carolina’s Piedmont Region in 2009 had a household income over \$50,000.
- ◆ In 2009, Raleigh/Durham/Fayetteville (9.2%) was the top advertising market of origin for *overnight* travelers to the Piedmont Region, followed by Charlotte, NC (7.2%), Atlanta (6.4%), Washington DC (5.8%), Greensboro/High Point/Winston-Salem (5.7%), New York (5.5%) and Greenville/New Bern/Washington (3.7%).

Piedmont Region Overnight Visitor Profile

Main Purpose of Visit

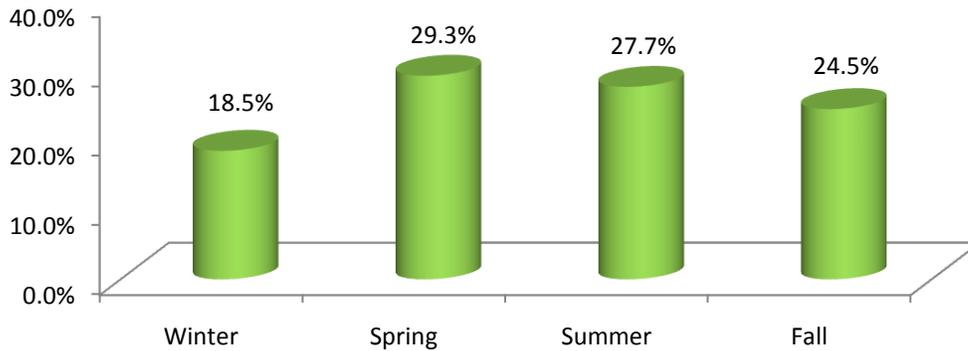
In 2009, over seventy-five percent (76.6%) of domestic overnight visitors came to the Piedmont Region for leisure purposes, which included visiting friends and relatives, outdoor recreation and entertainment/sightseeing. Almost twenty percent (18.0%) of domestic overnight visitors came for general business, convention, seminar or other group meeting, while over five percent traveled to the Piedmont Region to conduct personal or “other” business.



Travel Volume by Season

When examining visitation based on the typical seasonal schedule, the Piedmont Region saw fairly consistent visitation throughout the year. The spring season (March through May) had a slight edge with just over a fourth of the year's overnight visitation (29.3%). The summer (June through August) was next with twenty-eight percent, followed by fall (September through November) with twenty-five percent and winter (December through February) with nineteen percent.

2009 Overnight Travel by Season to North Carolina's Piedmont Region



Average Length of Stay

In 2009, an average of 3.2 nights was spent by visitors to North Carolina's Piedmont Region.

Travel Party Size

The average travel party size for all Piedmont Region overnight visitors was 2.4 people.

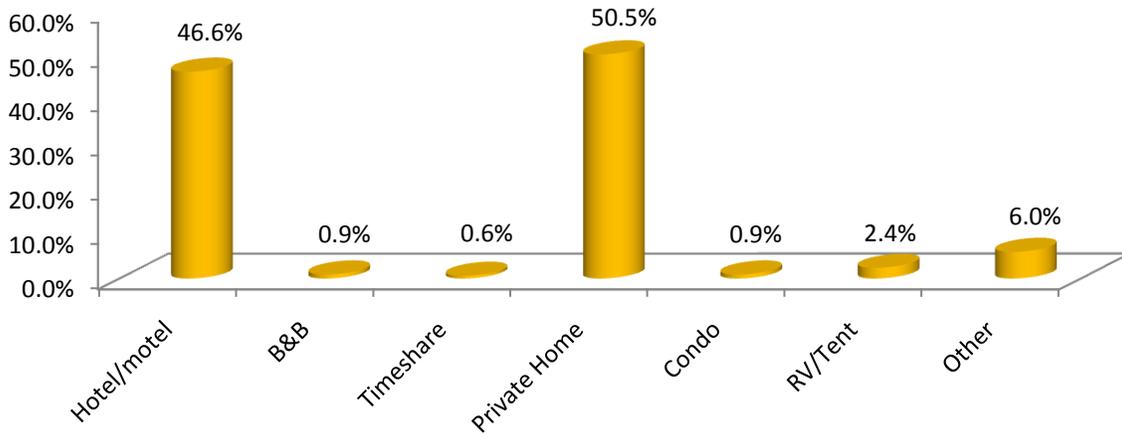
Children on Trip

Twenty-four percent of overnight visitor parties to the Piedmont Region included children. Among those who traveled with children, the average number of children on trips was 1.8.

Lodging Used in Piedmont Region

The majority of overnight visitors to the Piedmont Region in 2008 stayed either in a private home (50.5%) or a hotel/motel (46.6%). The remaining eleven percent stayed in a B&B (0.9%), condo (0.9%), timeshare (0.6%), RV/tent (2.4%) or other (6.0%).

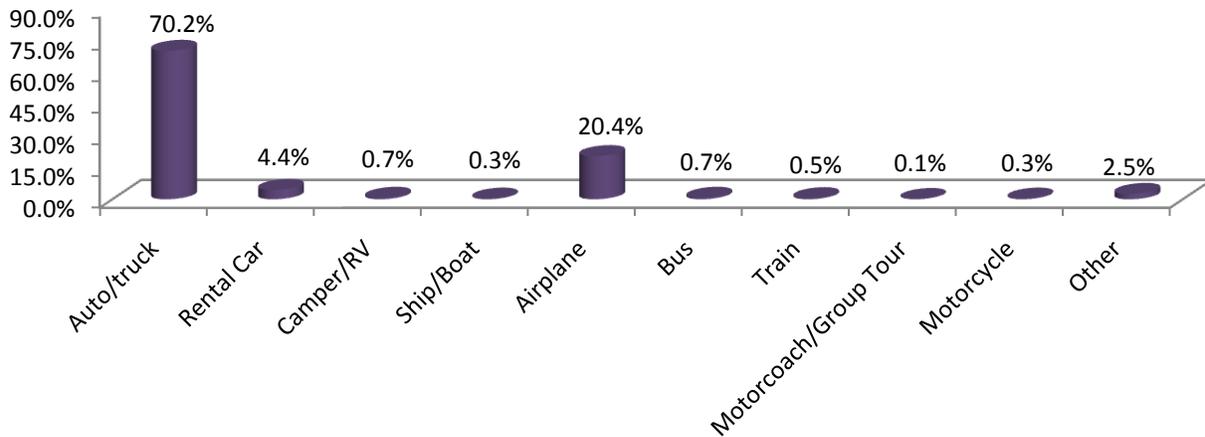
2009 Lodging by Overnight Visitors to North Carolina's Piedmont Region



Mode of Transportation

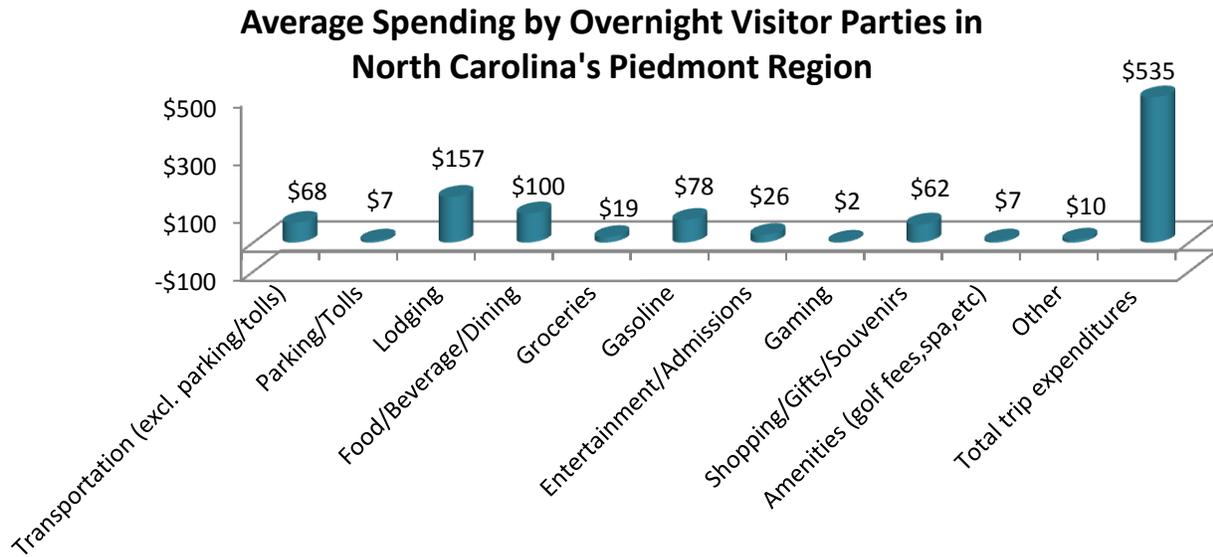
In 2009, the personal auto was most used form of transportation (70.2%) to the Piedmont Region, however twenty percent traveled by air, up from nineteen percent in 2008.

2009 Primary Mode of Transportation to North Carolina's Piedmont Region



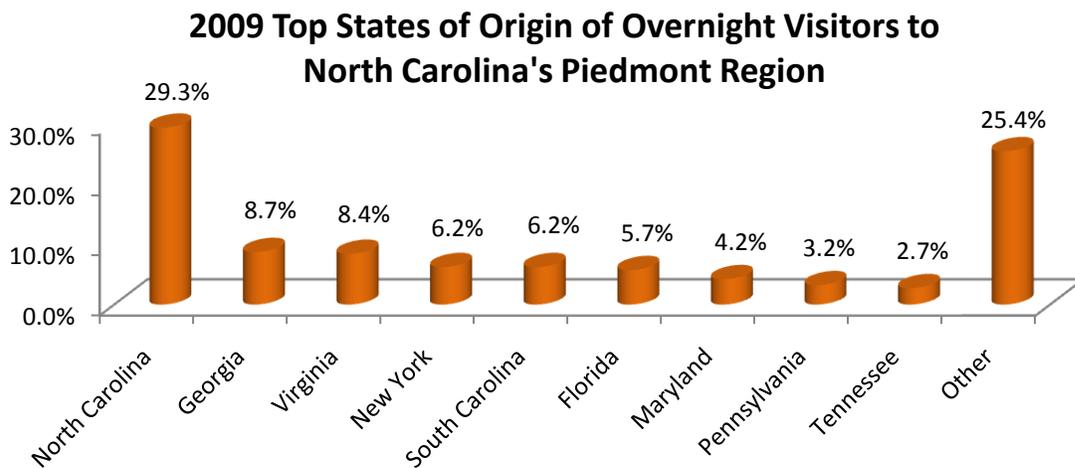
Amount Spent in Piedmont Region

The average overnight visitor party spending in the Piedmont Region was \$535.



Origin of Visitors

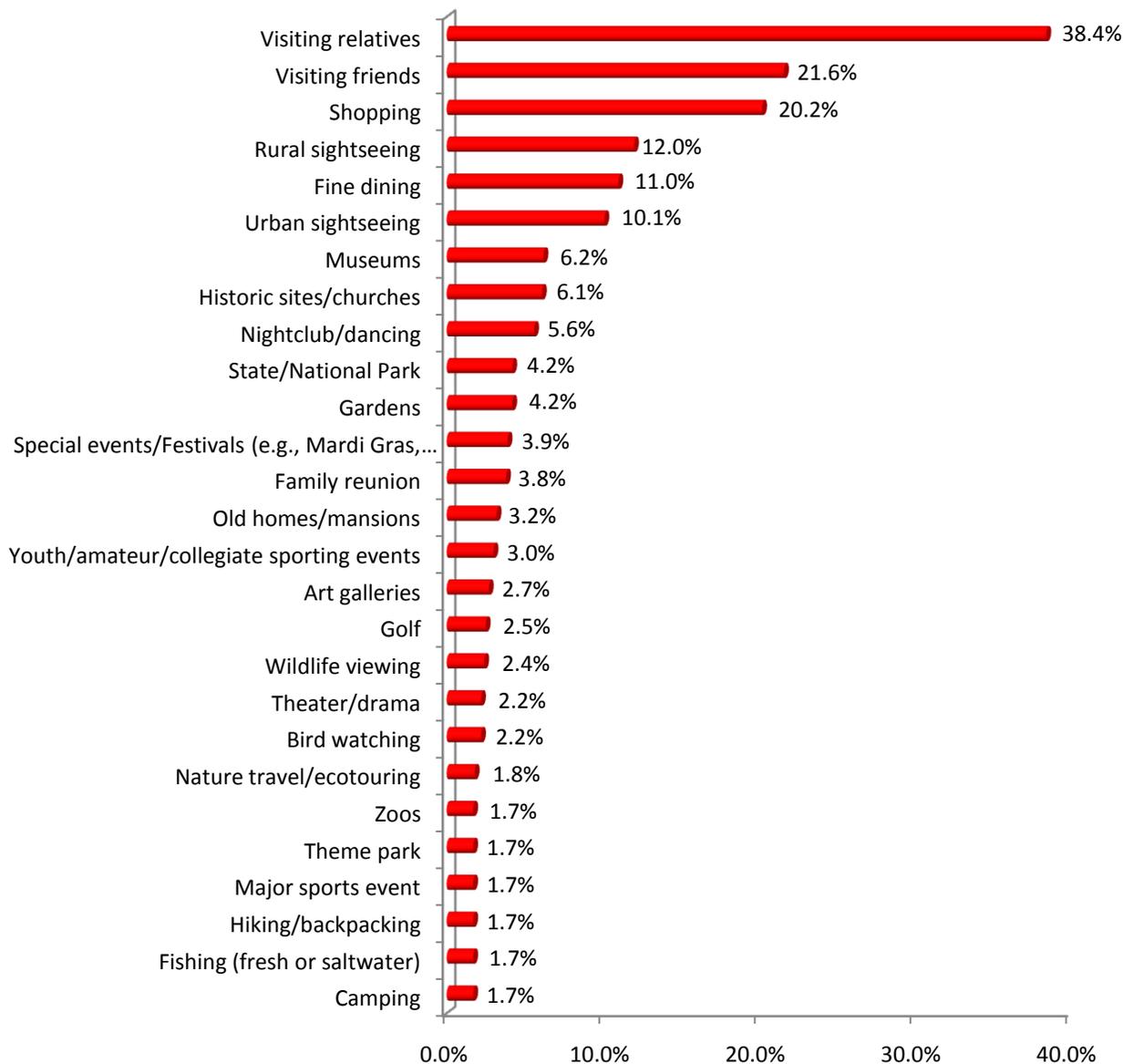
In 2009, the top states of origin for Piedmont Region overnight visitors included North Carolina (29.3%), Georgia (8.7%), Virginia (8.4%), New York (6.2%), and South Carolina (6.2%).



Activities

Over one-third (38.4%) of the overnight visitors to North Carolina’s Piedmont Region visited relatives while visiting the region. Just over twenty percent (21.6%) visited friends and shopped (20.2%). Other popular activities included rural sightseeing (12.0%), fine dining (11.0%), urban sightseeing (10.1%), and museums (6.2%).

2009 Activities Participated in by Overnight Visitors to North Carolina's Piedmont Region



Demographic Profile of North Carolina Overnight Visitors to Piedmont

The North Carolina Piedmont Region overnight visitor gender breakdown is fifty-eight percent female and forty-two percent male. More than half (60.9%) of the visitors are married and just about seventeen percent of the region's visitors are divorced, widowed or separated.

The largest proportion of North Carolina Piedmont Region overnight visitors classify themselves as white (79.2%), and fifteen percent classify themselves as black/African American.

Over one-half (61.1%) of Piedmont Region overnight visitor parties have a household head with a college degree or higher. The average Piedmont Region visitor is 46 years old, with almost one-half (47.5%) being 45 years old or older.

Over one-third (42.2%) of the visitor parties that traveled to North Carolina's Piedmont Region in 2009 had a household income \$75,000 or over. Fourteen percent had a household income of over \$125,000.

2009 Top Advertising Markets

In 2009, the top advertising markets sending overnight visitors to **North Carolina's Piedmont Region** were Raleigh-Durham-Fayetteville (9.2%), Charlotte (7.2%), Atlanta (6.4%), and Washington DC (5.8%). Advertising markets correspond with Nielsen's Designated Market Areas (DMAs).

Top Advertising Markets of Origin for 2009 *Overnight* Piedmont Region Visitors

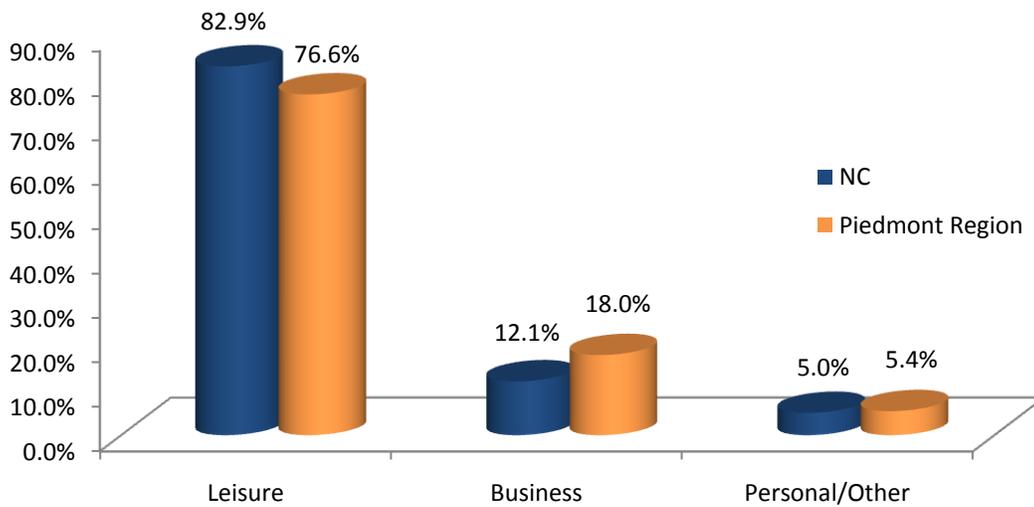
<i>DMA of Origin</i>	<i>Percent of Total Visitors to Piedmont</i>	<i>Piedmont Market Share of North Carolina Visitors from DMA</i>
Raleigh-Durham (Fayetteville)	9.2%	32.6%
Charlotte	7.2%	37.9%
Atlanta	6.4%	54.4%
Washington DC (Hagerstown, MD)	5.8%	51.4%
Greensboro-High Point-Winston Salem	5.7%	35.0%
New York	5.5%	55.8%
Greenville-New Bern-Washington	3.7%	43.4%
Greenville-Spartanburg-Asheville	2.7%	24.3%
Roanoke-Lynchburg	2.6%	55.6%
Philadelphia, PA	2.3%	48.9%
Wilmington	2.2%	59.5%
Columbia, SC	2.0%	55.9%
Orlando-Daytona Beach-Melbourne	1.9%	50.0%

Note: Advertising markets defined by Nielsen's Designated Market Area (DMA)

2009 Piedmont Region versus North Carolina

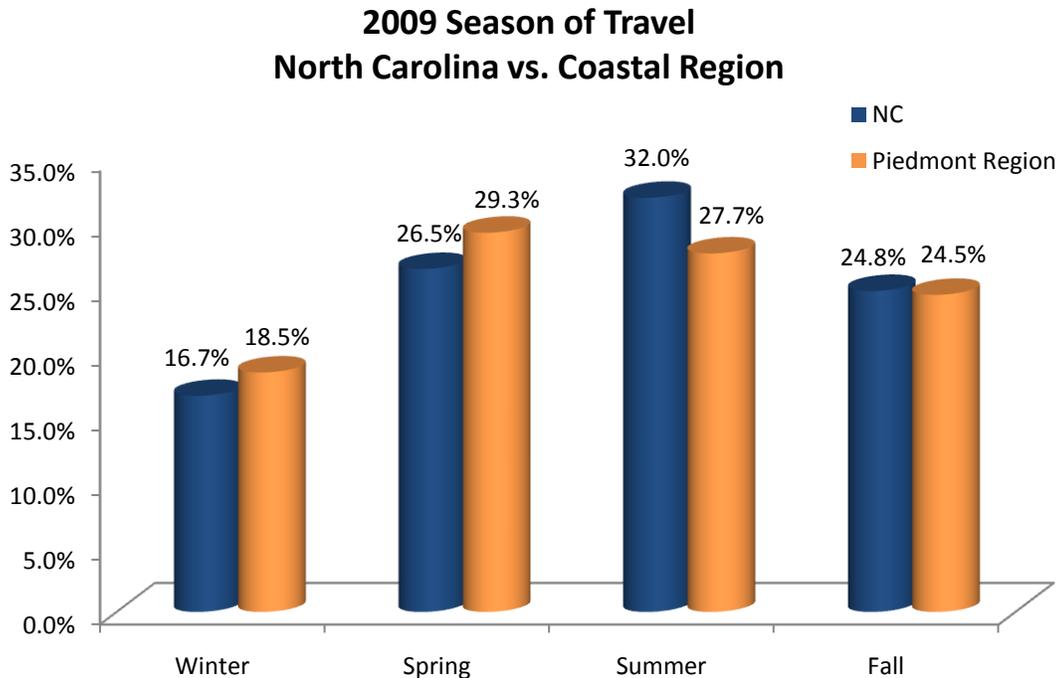
North Carolina’s Piedmont Region had a smaller share of visitors travel to the region for leisure reasons than North Carolina as a state (83% North Carolina vs. 77% Piedmont Region). At the same time, North Carolina’s share of business/convention travelers was smaller than the proportion for the Piedmont Region (12% North Carolina vs. 18% Piedmont Region).

**2009 Primary Purpose of Trip
North Carolina vs. Piedmont Region**



Travel Volume by Season

During the summer season (June through August) the state as a whole had a larger percentage of overnight visitors than the Piedmont Region, while the Piedmont Region had higher percentages of visitors in the winter and spring seasons. The fall season attributed approximately the same proportion of visitors to the state and piedmont.



Average Length of Stay

In 2009, an average of 3.2 nights were spent by visitors to North Carolina’s Piedmont Region, while the North Carolina overnight visitor stayed an average of 3.3 nights.

Travel Party Size

The average travel party size for all Piedmont Region overnight visitors was 2.4 people, slightly smaller than the average party size of the North Carolina visitor of 2.6 people.

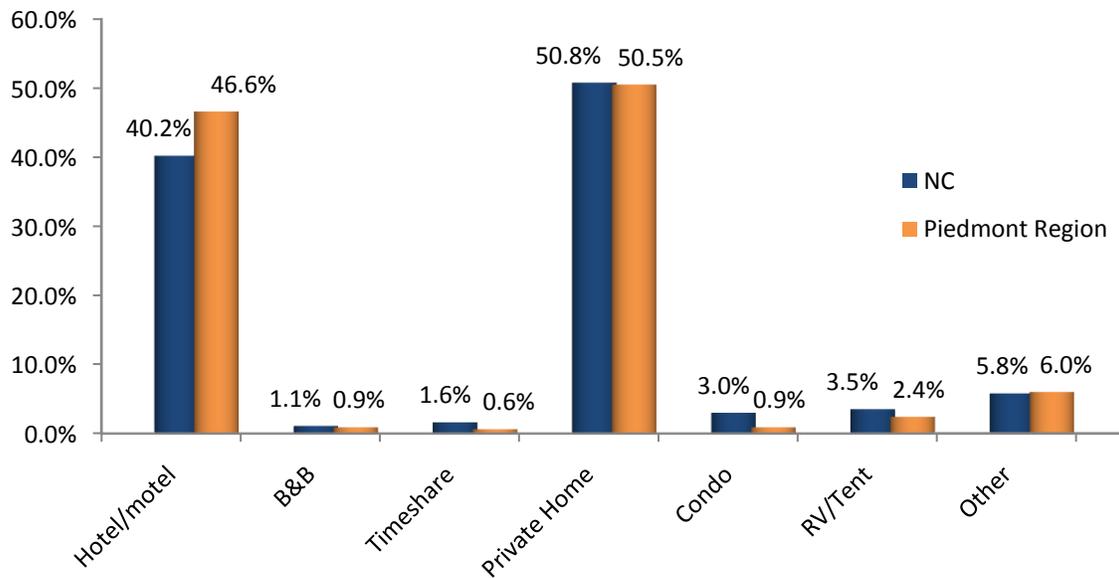
Children on Trip

Twenty-four percent of overnight visitor parties to the Piedmont Region included children. Twenty-seven percent of overnight North Carolina visitor parties included children.

Lodging Type

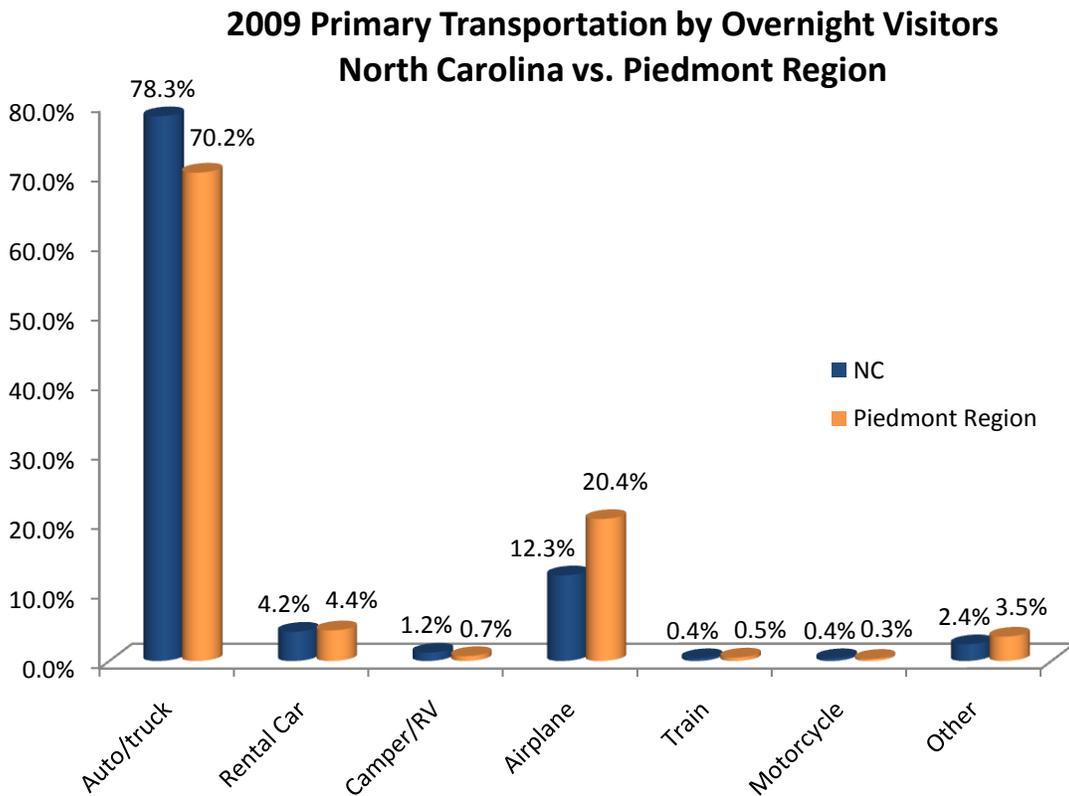
Both Piedmont Region overnight visitors and North Carolina visitors in general are more likely to stay in a private home or hotel/motel than other types of lodging. The differences between the proportions were slight, though the Piedmont Region has a larger proportion of visitors who stay in hotel/motels.

2009 Lodging by Overnight Visitors to North Carolina vs. Piedmont Region



Mode of Transportation

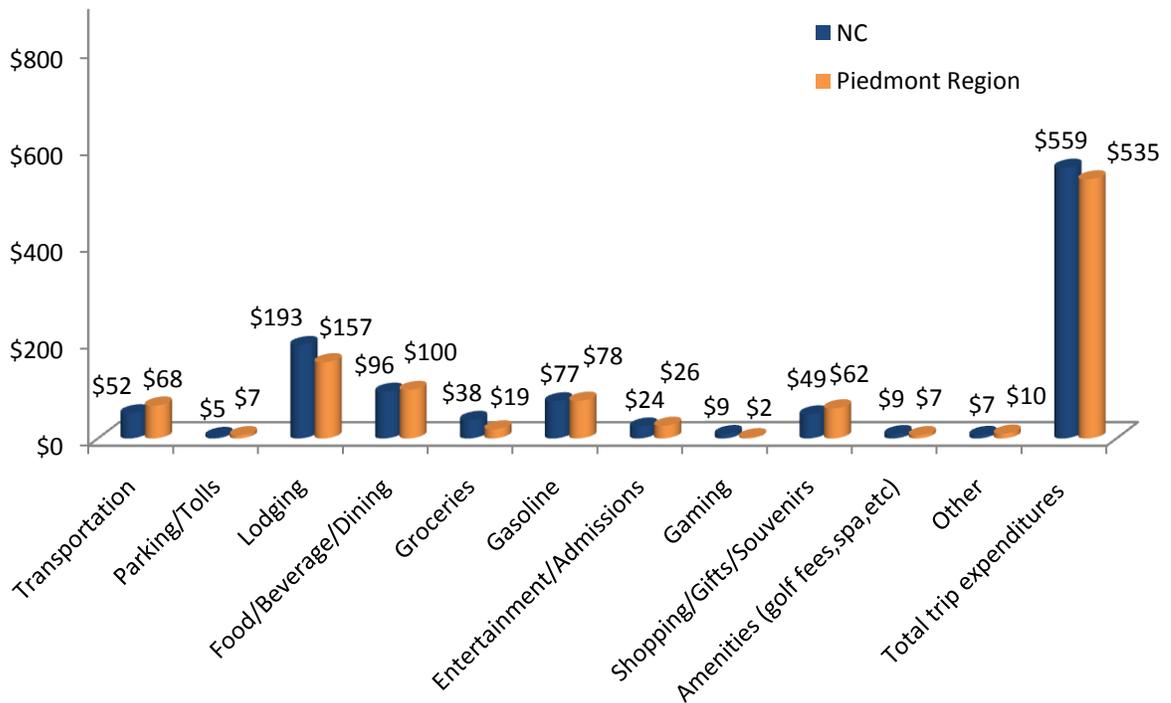
A higher percentage of travelers to the Piedmont Region flew to their destination than all North Carolina visitors (12% North Carolina vs. 20% Piedmont Region), while a higher percentage of travelers to North Carolina drove to their destination than Piedmont Region visitors (78% North Carolina vs. 70% Piedmont Region).



Amount Spent in Piedmont Region

The average overnight visitor party spending in the Piedmont Region was \$535, slightly lower than the state average party spending of \$559. Piedmont Region visitors spent more on shopping and transportation than visitors statewide.

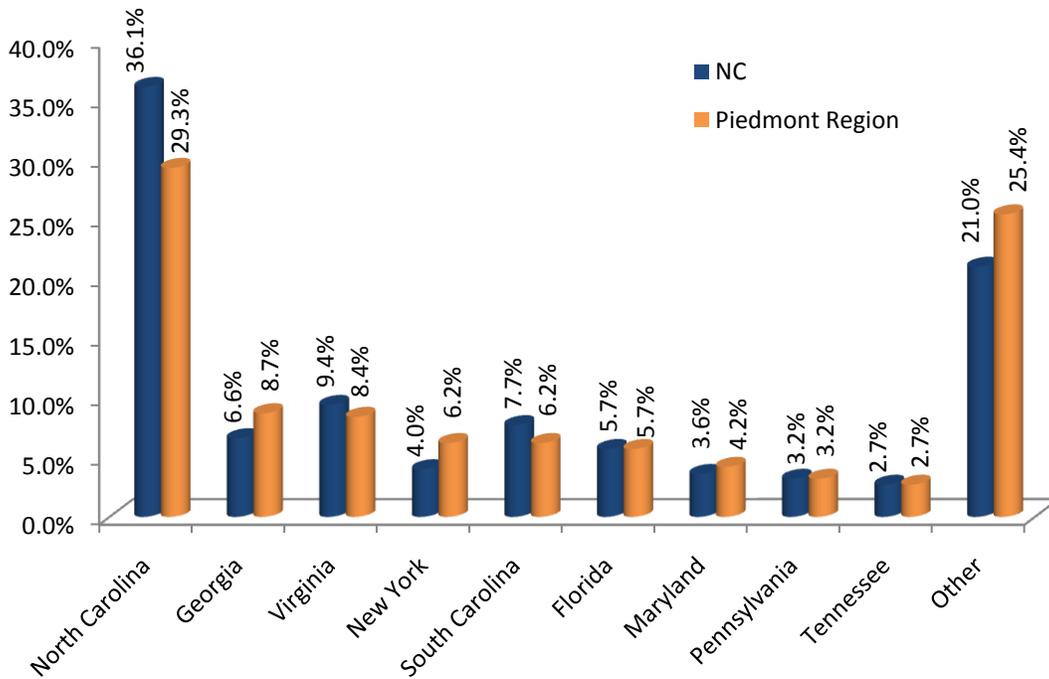
**Average Spending by Overnight Visitor Parties
North Carolina vs. Piedmont Region**



Origin of Overnight Visitors

The top states of origin for the state and the Piedmont Region were very similar in 2009, with slight variances between states. The Piedmont Region saw a higher percentage of Georgia, New York and Maryland residents than the state as a whole; while the state saw a larger proportion of in-state residents and visitors from Virginia and South Carolina than the region.

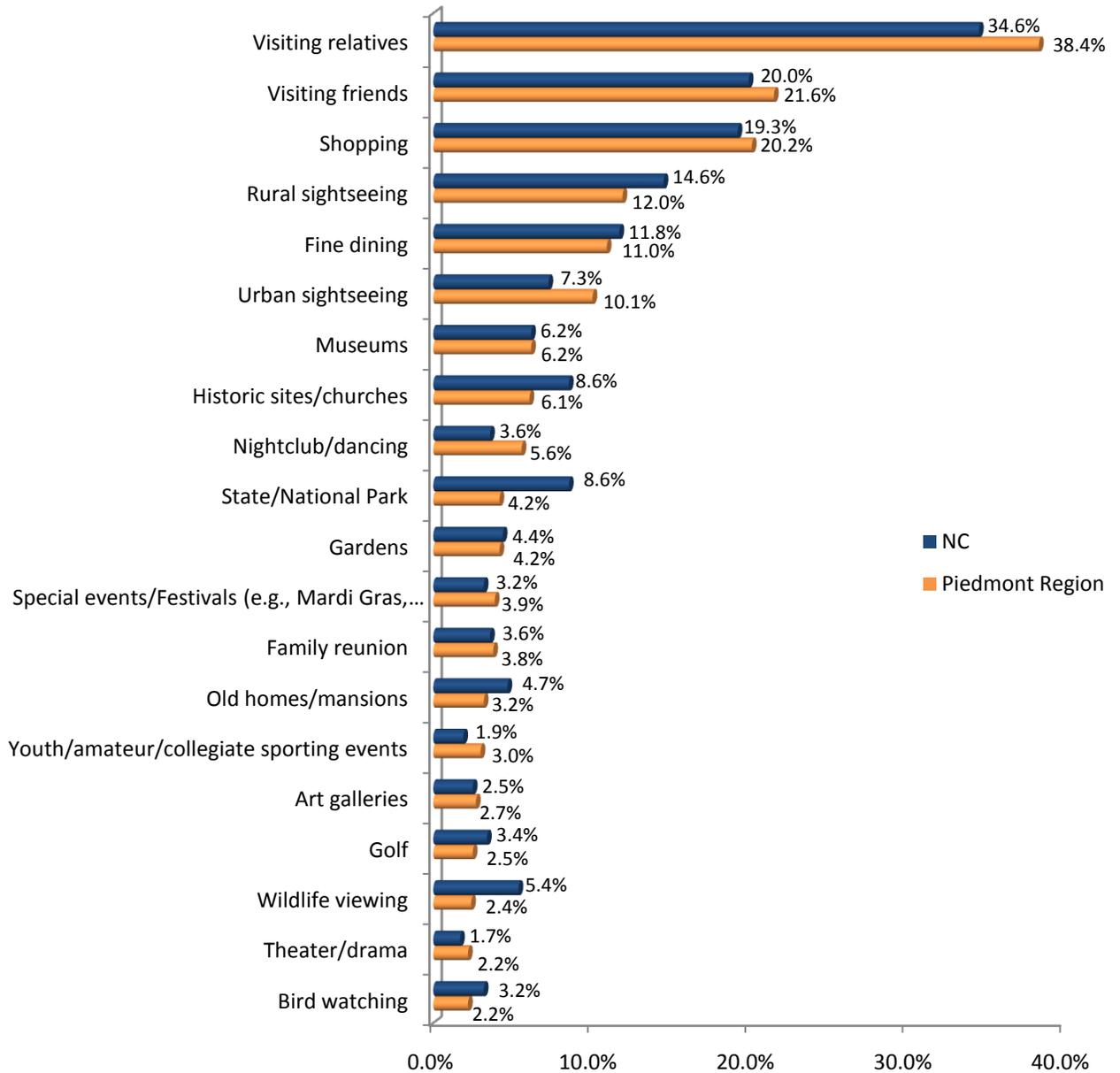
**2009 Top States of Origin of Overnight Visitors
North Carolina vs. Piedmont Region**



Activities

Compared to all North Carolina overnight travelers, the Piedmont Region had a larger share of visitors who visited relatives (35% North Carolina vs. 38.4% Piedmont Region) and friends (20% North Carolina vs. 21.6% Piedmont Region). The region also had a larger proportion of visitors participated in urban sightseeing (7% North Carolina vs. 10.1% Piedmont Region).

**2009 Activities Participated in by Overnight Visitors
North Carolina vs. Piedmont Region**



Demographic Profile for Overnight Visitor Parties

	North Carolina	Piedmont Region
Average age of household head	45.5 years of age	44.4 years of age
Education of Household Head		
High school or less	16.0%	14.6%
Some college - no degree	24.4%	22.7%
Completed college	41.2%	40.0%
Post Graduate College	18.5%	21.0%
Annual Household Income		
Less than \$25,000	13.6%	14.0%
\$25,000-\$49,999	25.2%	22.2%
\$50,000-\$74,999	22.1%	21.7%
\$75,000 & over	39.1%	42.1%
Marital Status		
Married	62.1%	60.9%
Never married	17.9%	21.7%
Divorced, widowed, separated	20.1%	17.4%
Ethnicity		
White	84.2%	79.2%
Black/African American	11.3%	14.7%
Asian or Pacific Islander	1.2%	1.5%
Other	3.3%	4.6%

2009 Top Advertising Markets

While the top ten advertising markets sending visitors to North Carolina’s Piedmont Region are very similar to the top ten advertising markets for the state of North Carolina, there are visitor shares from advertising markets that differ; such as Raleigh-Durham (12% North Carolina vs. 9% Piedmont Region).

Top Advertising Markets of Origin for 2009 Overnight Piedmont Region Visitors VS. North Carolina Visitors

<i>DMA of Origin</i>	<i>Percent of Total Visitors to Piedmont Region</i>	<i>Percent of Total Visitors to North Carolina</i>
Raleigh-Durham (Fayetteville)	9.2%	12.3%
Charlotte	7.2%	8.3%
Atlanta	6.4%	5.2%
Washington DC (Hagerstown, MD)	5.8%	5.0%
Greensboro-High Point-Winston Salem	5.7%	7.2%
New York	5.5%	4.3%
Greenville-New Bern-Washington	3.7%	3.8%
Greenville-Spartanburg-Asheville	2.7%	4.9%
Roanoke-Lynchburg	2.6%	2.1%
Philadelphia, PA	2.3%	2.0%
Wilmington	2.2%	1.7%
Columbia, SC	2.0%	1.5%
Orlando-Daytona Beach-Melbourne	1.9%	1.6%

Note: Advertising markets defined by Nielsen’s Designated Market Area (DMA)

2009 Domestic Mountain Region Travel

Summary

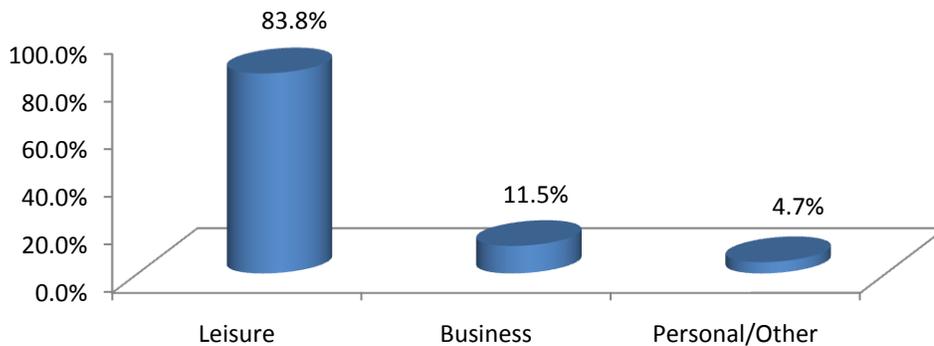
- ◆ In 2009, twenty percent of North Carolina visitors traveled to North Carolina’s Mountain Region, approximately 7.3 million person-trips. For marketing purposes, the Mountain Region is made up of the 23 western-most counties of North Carolina.
- ◆ Eighty-four percent of domestic visitors came to the Mountain Region for pleasure purposes, while twelve percent of visitors came to conduct business (includes meeting/convention). The remaining four percent reported personal business or “other” purpose of visit.
- ◆ Travel to the Mountain Region of North Carolina was heaviest in the summer and fall. The fall (September - November) had the highest proportion of visitors, with thirty-one percent of all 2009 Mountain Region visitors. Summer followed with twenty-eight percent of visitors (June - August), followed by spring (March - May) with twenty-three percent and winter (December - February) with eighteen percent. September was the single largest month for mountain travel with twelve percent.
- ◆ Overnight visitors to the Mountain Region spent an average of 3.2 nights in the region.
- ◆ Fifty-five percent of Mountain Region visitors lodged in a hotel/motel while thirty-five percent stayed at a private home. Seven percent stayed in an RV park/campground.
- ◆ The average travel party size for all Mountain Region visitors was 2.6 people. Twenty-nine percent of travel parties to the region included children in the party.
- ◆ Eighty-eight percent of all travelers to the Mountain Region drove (includes personal automobile, rental vehicle, RV/camper), while seven percent traveled by air.
- ◆ In 2009, the average trip expenditure in the Mountain Region was \$472. The average trip expenditure for overnight visitors to the Mountain Region was \$617. Daytrip parties to the Mountain Region spent approximately \$142 per visit.
- ◆ The top states of origin of *overnight* visitors to the Mountain Region were North Carolina (30.5%), South Carolina (13.1%), Tennessee (8.5%), Florida (8.4%), and Georgia (7.9%).
- ◆ Fifty-nine percent of the households that traveled to North Carolina’s Mountain Region in 2009 had a household income over \$50,000.
- ◆ In 2009, Greenville/Spartanburg, SC/Asheville (11.4%), was the top DMA of origin for *overnight* travelers to the Mountain Region, followed by Charlotte, NC (9.5%), Raleigh/Durham/Fayetteville (8.1%), and Greensboro/High Point/Winston-Salem (6.7%) and Atlanta (6.6%).

Mountain Region Overnight Visitor Profile

Main Purpose of Visit

In 2009, almost nine out of ten (83.8%) of domestic overnight visitors came to the Mountain Region for leisure purposes, which included visiting friends and relatives, outdoor recreation and entertainment/sightseeing. Almost twelve percent (11.5%) of domestic overnight visitors came for general business, convention, seminar or other group meeting, while five percent traveled to the Mountain Region to conduct personal or “other” business.

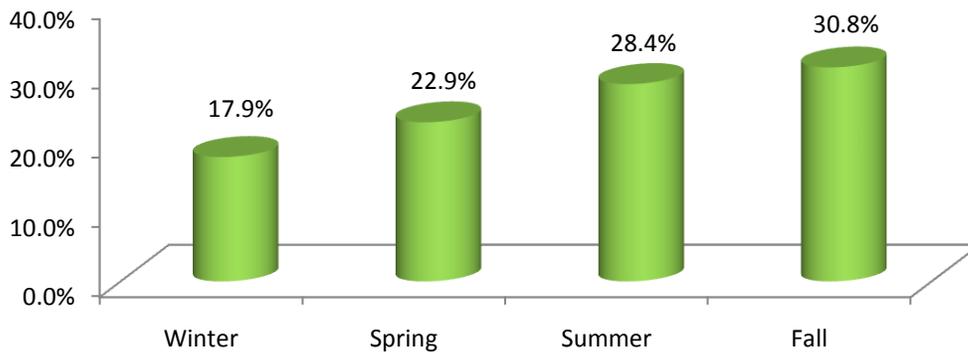
2009 Primary Purpose of Overnight Trip to North Carolina's Mountain Region



Travel Volume by Season

When examining visitation based on the typical seasonal schedule, the fall, (September through November) with thirty-one percent, was the most popular season of the year for overnight travel to North Carolina’s Mountain Region. The summer (June through August) was next with twenty-eight percent, followed by spring (March through May) with twenty-three percent and winter (December through February) with almost eighteen percent.

2009 Overnight Travel by Season to North Carolina's Mountain Region



Average Length of Stay

In 2009, an average of 3.2 nights was spent by visitors to North Carolina’s Mountain Region.

Travel Party Size

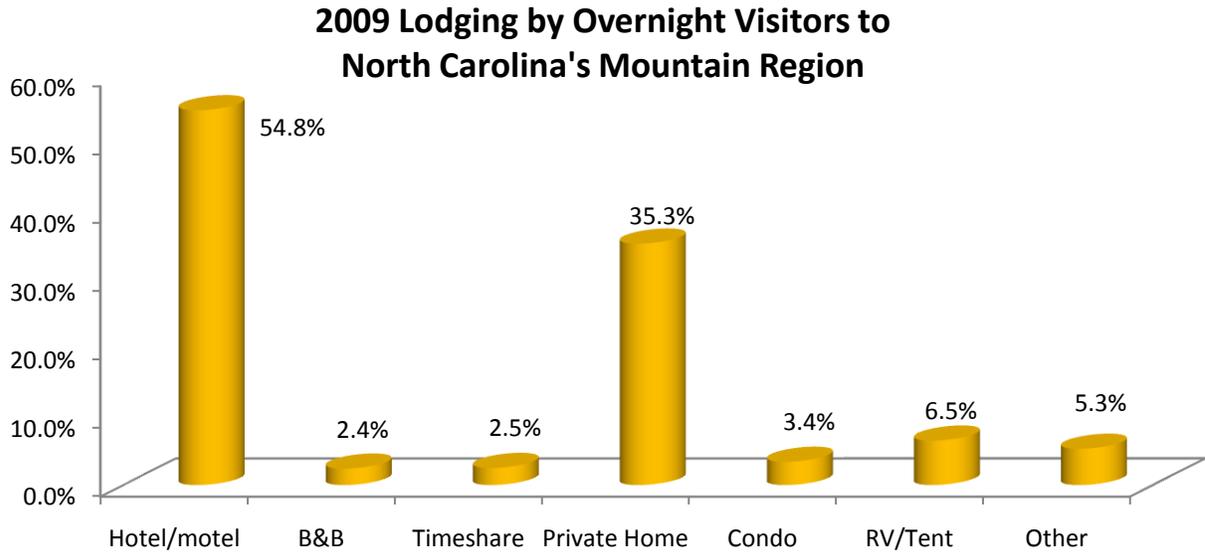
The average travel party size for Mountain Region overnight visitors was 2.6 people.

Children on Trip

Twenty-nine percent of overnight visitor parties to the Mountain Region included children. Among those who traveled with children, the average number of children on trips was 1.8.

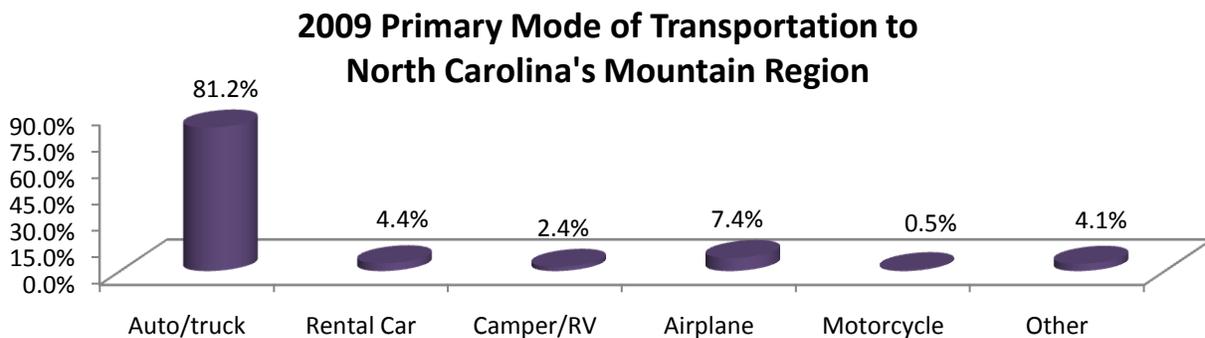
Lodging Used in Mountain Region

In 2009, over one-half of Mountain Region visitors stayed in a hotel/motel (54.8%). Thirty-five percent lodged in a private home and seven percent stayed in a RV/Tent.



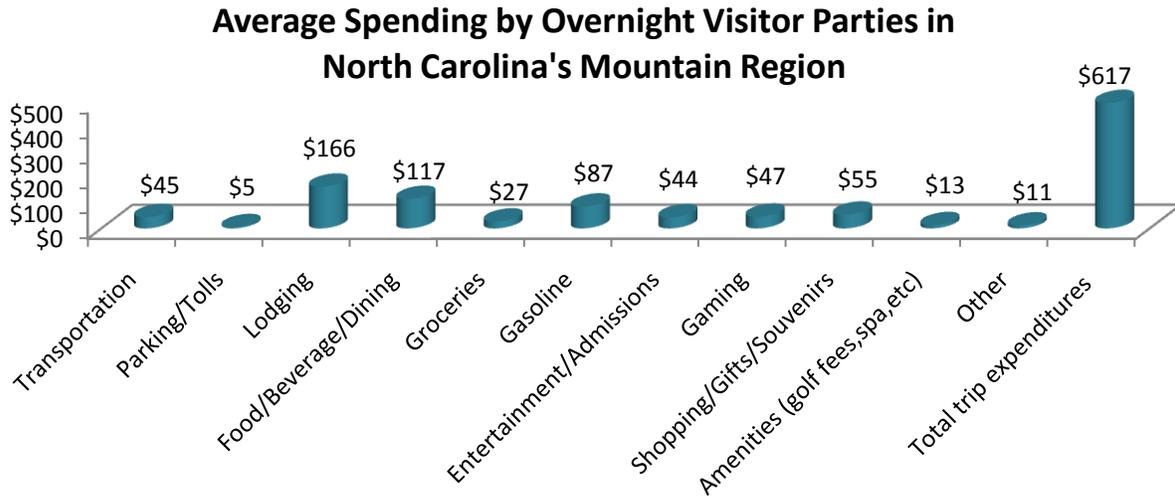
Mode of Transportation

In 2009, the auto was by far the dominant form of transportation (81.2%) to the Mountain Region, while over seven percent traveled by air.



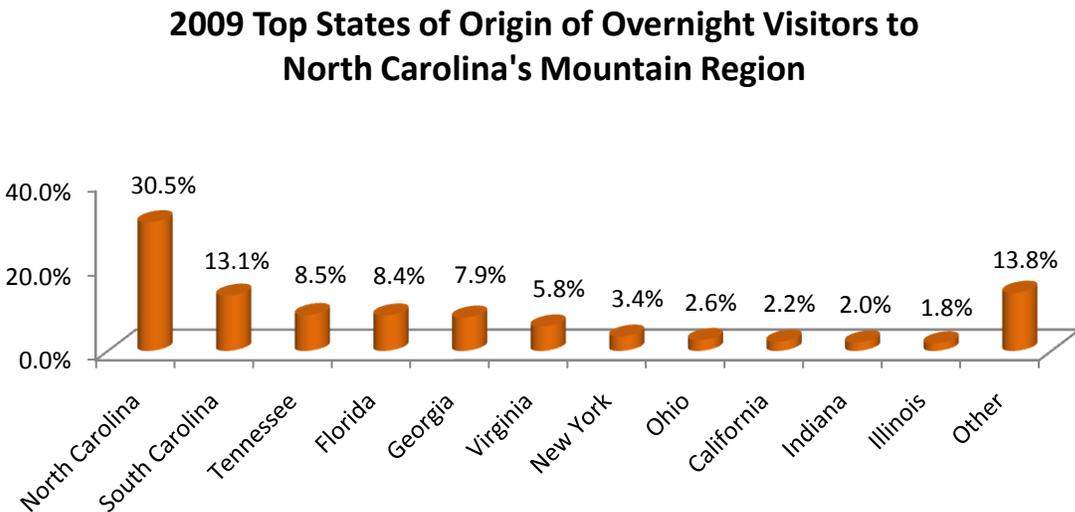
Amount Spent in Coastal Region

The average overnight visitor party spending in the Mountain Region was \$617.



Origin of Visitors

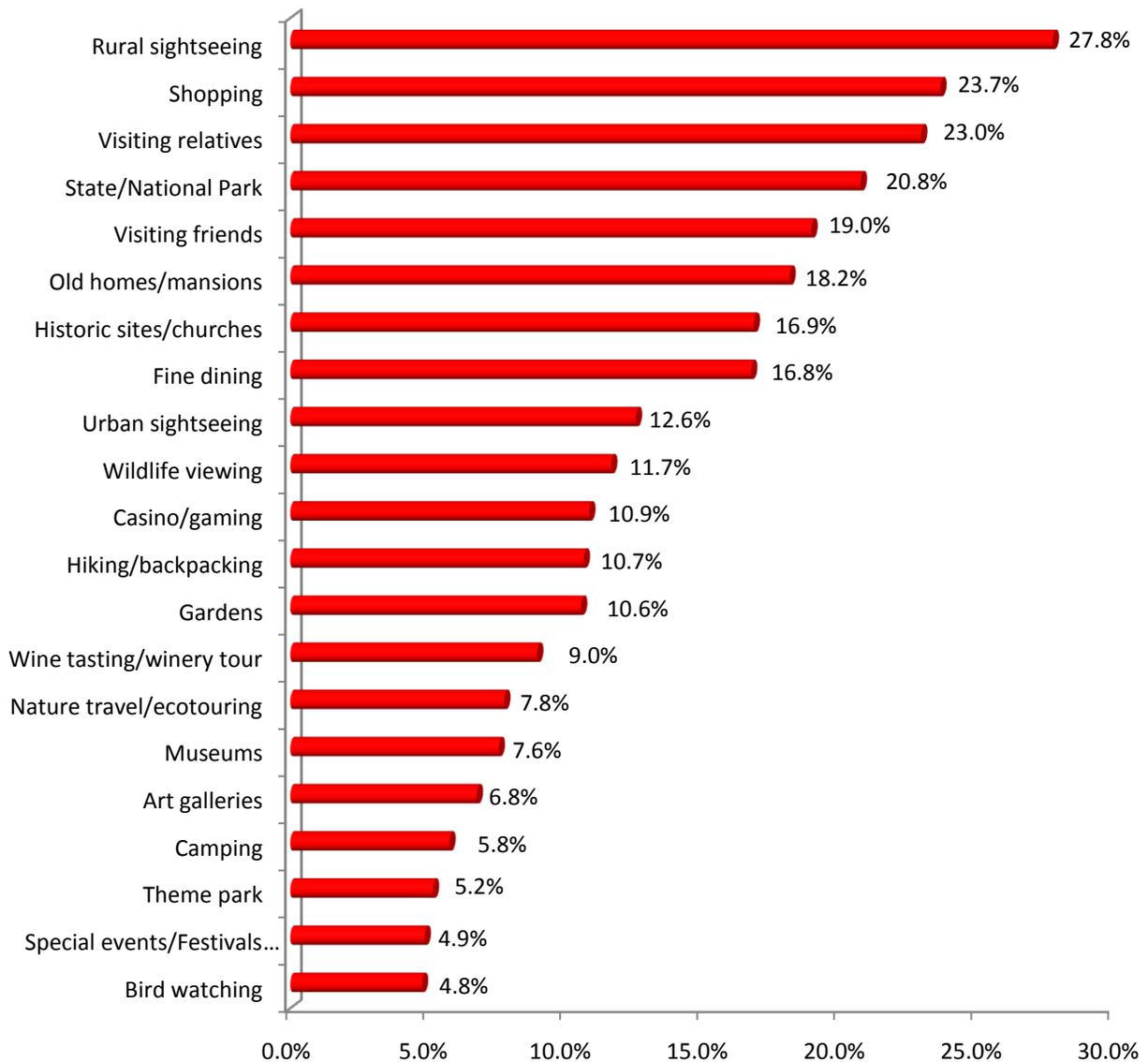
In 2009, the top states of origin for Mountain Region overnight visitors included North Carolina (30.5%), South Carolina (13.1%), Tennessee (8.5%), Florida (8.4%) and Georgia (7.9%).



Activities

Over one-fourth (27.8%) of the overnight visitors to North Carolina’s Mountain Region participated in rural sightseeing while visiting the region and almost that many shopped (23.7%) and visited relatives (23.0%). Twenty-one percent (20.8%) visited a state or national park while visiting North Carolina’s mountains.

2009 Activities Participated in by Overnight Visitors to North Carolina's Mountain Region



Demographic Profile of North Carolina Overnight Visitors

The North Carolina Mountain Region overnight visitor gender breakdown is fifty-eight percent female and forty-two percent male. More than half (64.6%) of the visitors are married and just over one-fifth of the region's visitors are divorced, widowed or separated.

The largest proportion of North Carolina Mountain Region overnight visitors classify themselves as white (91.6%), and almost four percent classify themselves as black/African American.

Over one-half (58.8%) of Mountain Region overnight visitor parties have a household head with a college degree or higher. The average Mountain Region visitor is 46 years old, with over half (54.2%) being 45 years old or older.

Forty-two percent of the visitor parties that traveled to North Carolina's Mountain Region in 2008 had a household income \$75,000 or over. Eleven (11.1%) percent had a household income of over \$125,000.

2009 Top Advertising Markets

In 2009, the top advertising markets sending overnight visitors to **North Carolina's Mountain Region** were Greenville-Spartanburg-Asheville (11.4%), Charlotte (9.5%), Raleigh-Durham (8.1%), Greensboro-High Point-Winston Salem (6.7%), and Atlanta (6.6%). Advertising markets correspond with Nielsen's Designated Market Areas (DMAs).

Top Advertising Markets of Origin for 2009 *Overnight* Mountain Region Visitors

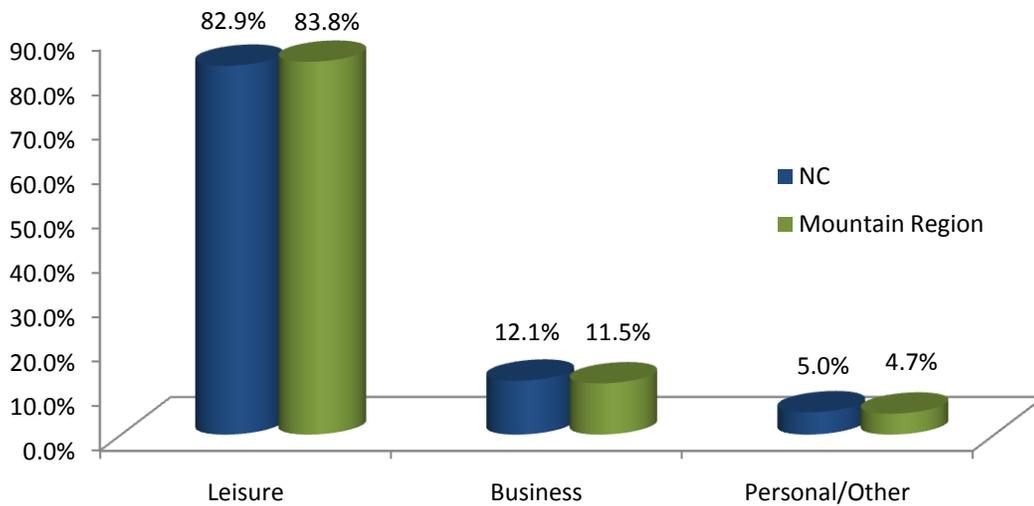
<i>DMA of Origin</i>	<i>Percent of Total Visitors to Mountain Region</i>	<i>Mountain Market Share of North Carolina Visitors from DMA</i>
Greenville-Spartanburg-Asheville	11.4%	38.3%
Charlotte	9.5%	18.7%
Raleigh-Durham (Fayetteville)	8.1%	10.7%
Greensboro-High Point-Winston Salem	6.7%	15.3%
Atlanta, GA	6.6%	21.1%
Knoxville, TN	4.8%	58.6%
Columbia, SC	3.3%	35.3%
New York	3.2%	11.6%
Tri-Cities, TN-VA	2.5%	56.3%
Roanoke-Lynchburg	2.2%	17.8%
Tampa-St. Petersburg, FL	2.1%	28.6%
Richmond-Petersburg, VA	1.9%	18.9%
Nashville	1.9%	31.8%

Note: Advertising markets defined by Nielsen's Designated Market Area (DMA)

2009 Mountain Region versus North Carolina

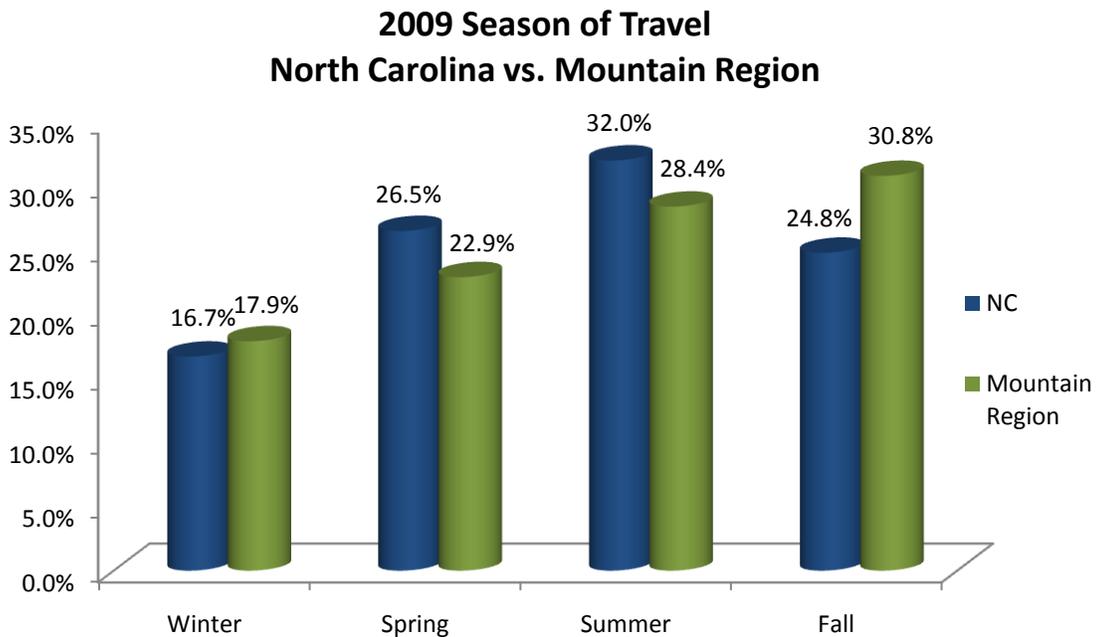
North Carolina’s Mountain Region had only a very slightly larger share of visitors travel to the region for leisure reasons than North Carolina as a state (83% North Carolina vs. 84% Mountain Region).

**2009 Primary Purpose of Trip
North Carolina vs. Mountain Region**



Travel Volume by Season

During the fall season (September through November) the Mountain Region had a significantly higher percentage of overnight visitors than North Carolina as a whole, while North Carolina had higher percentages of visitors in the spring and summer seasons. The winter season attributed close to the same proportion of visitors to the state and mountains.



Average Length of Stay

In 2009, an average of 3.2 nights was spent by visitors to North Carolina’s Mountain Region, while the North Carolina overnight visitor stayed an average of 3.3 nights.

Travel Party Size

The average travel party size for all Coastal Region overnight visitors was 2.6 people, the same as the average party size of the North Carolina visitor.

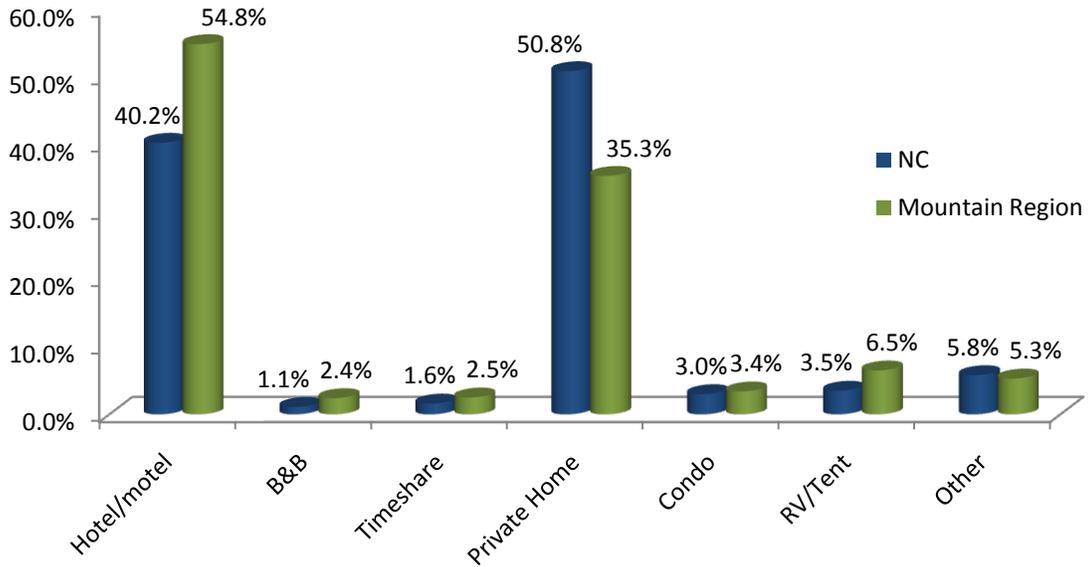
Children on Trip

Twenty-one percent of overnight visitor parties to the Mountain Region, while twenty-seven percent of visitors to the state included children.

Lodging Type

Both Mountain Region overnight visitors and North Carolina visitors in general are more likely to stay in hotel/motel or a private home than other types of lodging. However, Mountain Region visitors have a much higher proportion for hotel/motel (40% North Carolina vs. 55% Mountain Region). The Mountain Region also saw a larger proportion of visitors who stay in an RV/tent than the state in general (4% North Carolina vs. 7% Mountain Region).

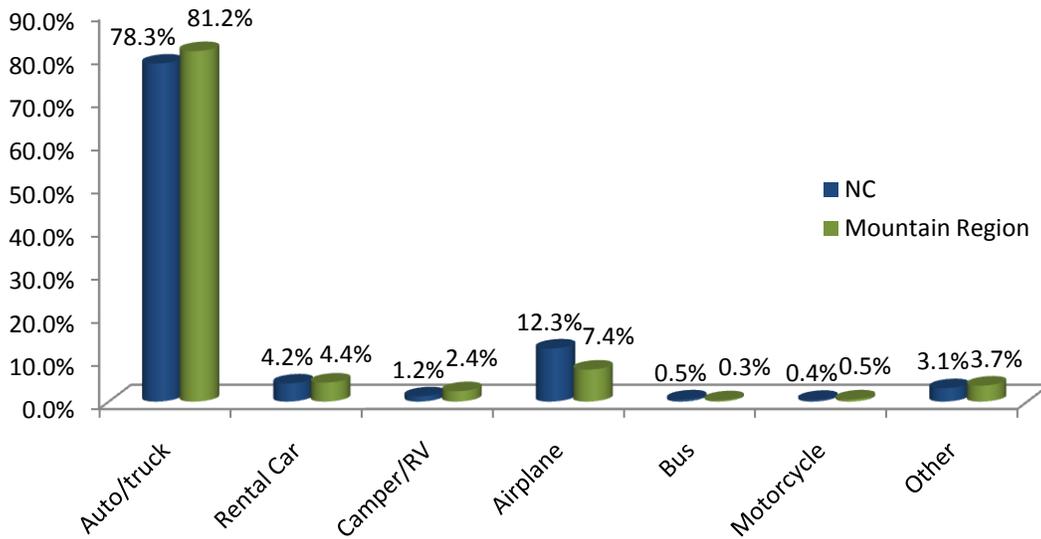
2009 Lodging by Overnight Visitors to North Carolina vs. Mountain Region



Mode of Transportation

A higher percentage of travelers to the Mountain Region drove to their destination than all North Carolina visitors (78% North Carolina vs. 81% Mountain Region), while a higher percentage of travelers to North Carolina flew to their destination than Mountain Region visitors (12% North Carolina vs. 7% Mountain Region).

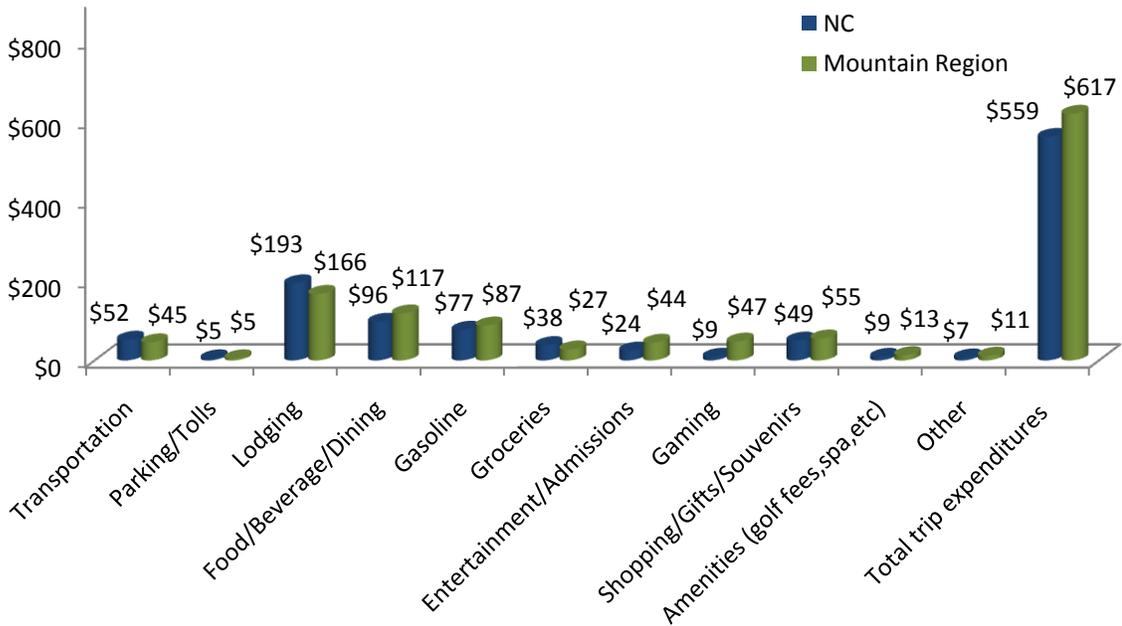
**2009 Primary Transportation by Overnight Visitors
North Carolina vs. Mountain Region**



Amount Spent in Mountain Region

The average overnight visitor party spending in the Mountain Region was \$617, almost \$60 higher than the state average party spending of \$559.

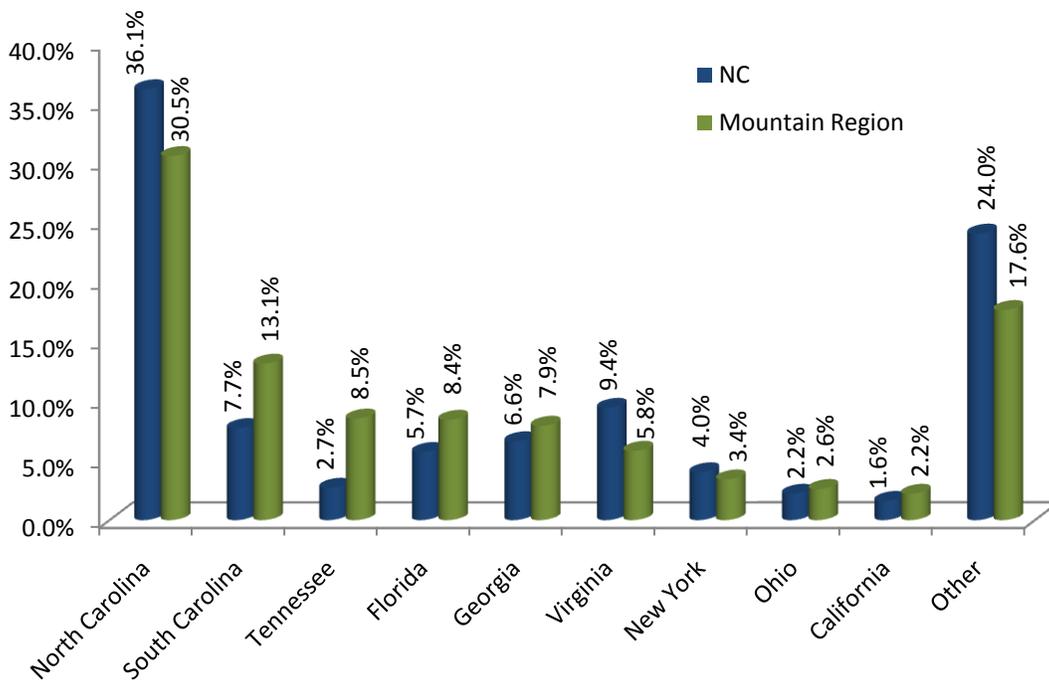
**Average Spending by Overnight Visitor Parties
North Carolina vs. Mountain Region**



Origin of Overnight Visitors

The top states of origin were very similar in 2009, with slight variances between states. The state saw a higher percentage of in-state visitors and Virginia residents than the Mountain Region; while the Mountain Region saw a larger proportion of visitors from South Carolina, Tennessee, and Florida.

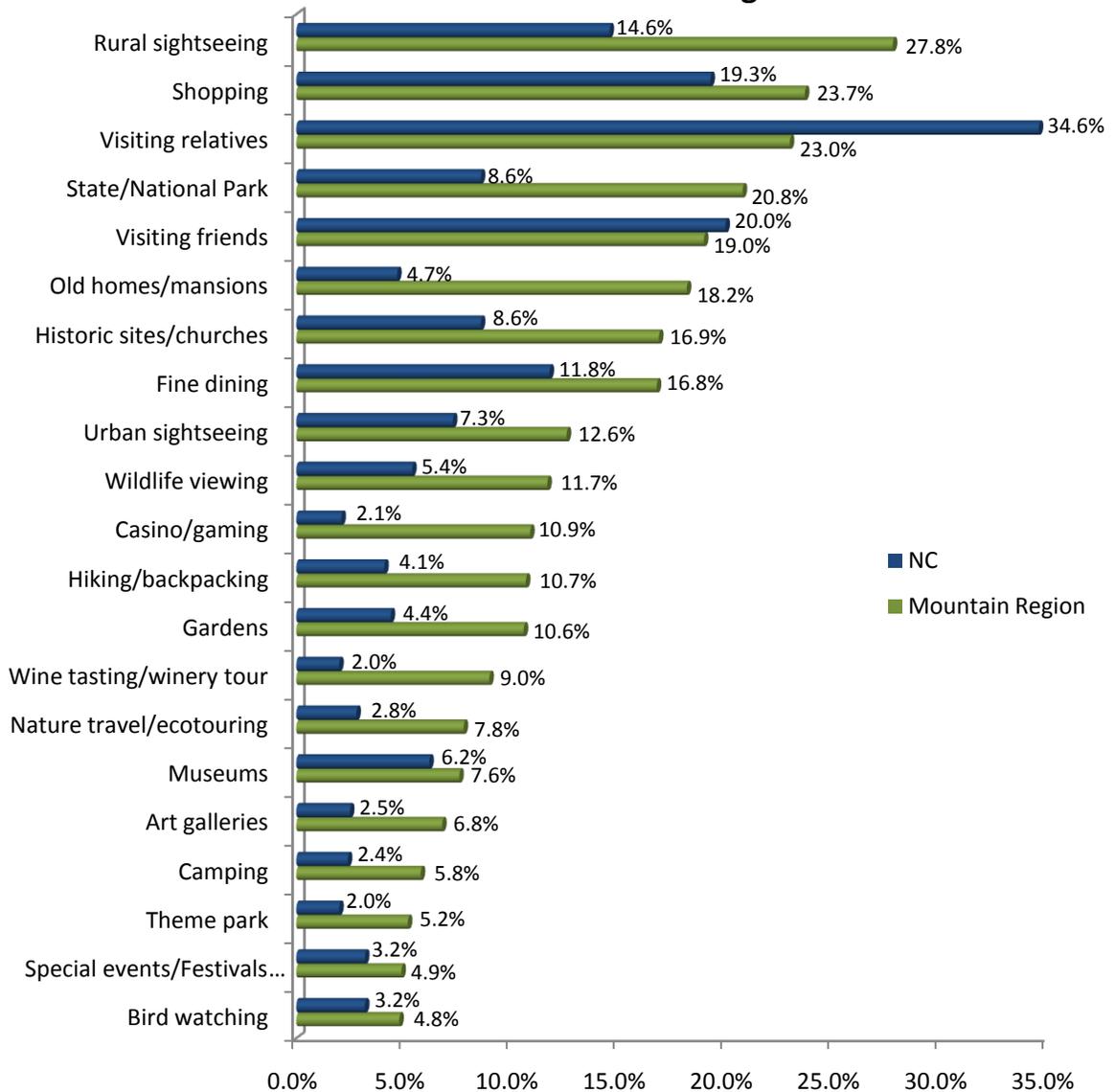
2009 Top States of Origin of Overnight Visitors
North Carolina vs. Coastal Region



Activities

Compared to all North Carolina overnight travelers, visitors to the Mountain Region participated in a greater number of activities while visiting the state. The region had a much larger share of visitors participate in rural sightseeing (15% North Carolina vs. 28% Mountain Region), visit a state/national park (9% North Carolina vs. 21% Mountain Region) and shopping (19% North Carolina vs. 24% Mountain Region).

**2009 Activities Participated in by Overnight Visitors
North Carolina vs. Mountain Region**



Demographic Profile for Overnight Visitor Parties

	North Carolina	Mountain Region
Average age of household head	45.5 years of age	46.3 years of age
Education of Household Head		
High school or less	16.0%	15.3%
Some college - no degree	24.4%	24.3%
Completed college	41.2%	39.8%
Post Graduate College	18.5%	19.0%
Annual Household Income		
Less than \$25,000	13.6%	15.5%
\$25,000-\$49,999	25.2%	25.2%
\$50,000-\$74,999	22.1%	21.4%
\$75,000 & over	39.1%	37.9%
Marital Status		
Married	62.1%	65.5%
Never married	17.9%	15.5%
Divorced, widowed, separated	20.1%	18.9%
Ethnicity		
White	84.2%	90.2%
Black/African American	11.3%	4.5%
Asian or Pacific Islander	1.2%	1.9%
Other	3.3%	3.4%

2009 Top Advertising Markets

While the top ten advertising markets sending visitors to North Carolina’s Mountain Region are similar to the top ten advertising markets for the state of North Carolina, the Mountain Region saw a larger proportion of visitors from Greenville/Spartanburg, Knoxville, Charlotte, and Atlanta.

Top Advertising Markets of Origin for 2009 Overnight Mountain Region Visitors VS. North Carolina Visitors

<i>DMA of Origin</i>	<i>Percent of Total Visitors to Mountain Region</i>	<i>Percent of Total Visitors to North Carolina</i>
Greenville-Spartanburg-Asheville	11.4%	4.9%
Charlotte	9.5%	8.3%
Raleigh-Durham (Fayetteville)	8.1%	12.3%
Greensboro-High Point-Winston Salem	6.7%	7.2%
Atlanta, GA	6.6%	5.2%
Knoxville, TN	4.8%	1.3%
Columbia, SC	3.3%	1.5%
New York	3.2%	4.3%
Tri-Cities, TN-VA	2.5%	0.7%
Roanoke-Lynchburg	2.2%	2.1%
Tampa-St. Petersburg, FL	2.1%	1.3%
Richmond-Petersburg, VA	1.9%	1.7%
Nashville	1.9%	1.0%

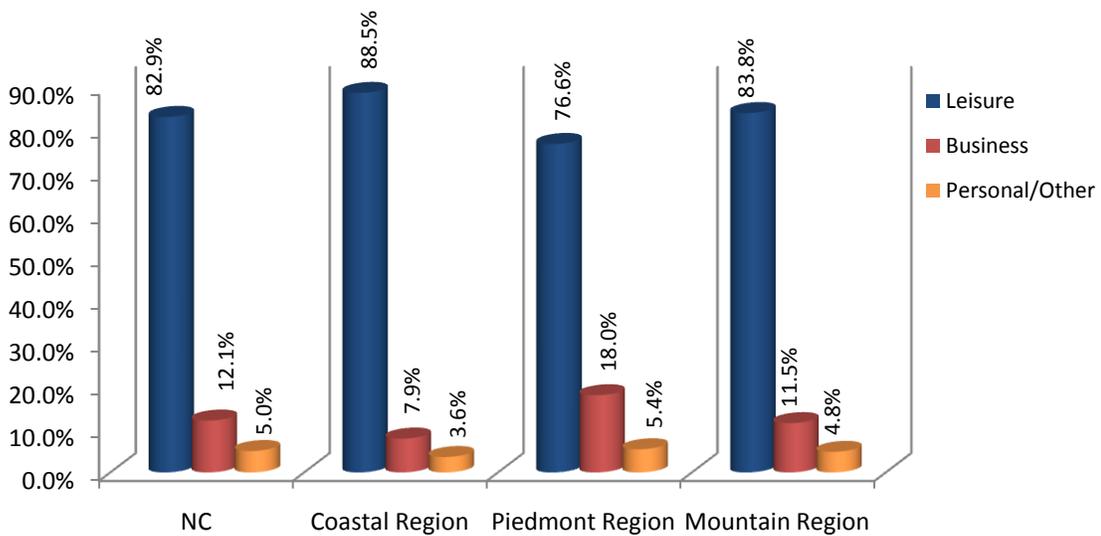
Note: Advertising markets defined by Nielsen’s Designated Market Area (DMA)

2009 Regional Comparison

The following section provides graphical representations of the three geographic regions together in order to offer comparisons and contrasts of the regions' visitors.

Not surprisingly, North Carolina's Coastal and Mountain regions had larger shares of visitors travel to the regions for leisure reasons than the Piedmont Region. At the same time, the Piedmont Region's share of business/convention travelers was larger than the proportion for the other regions.

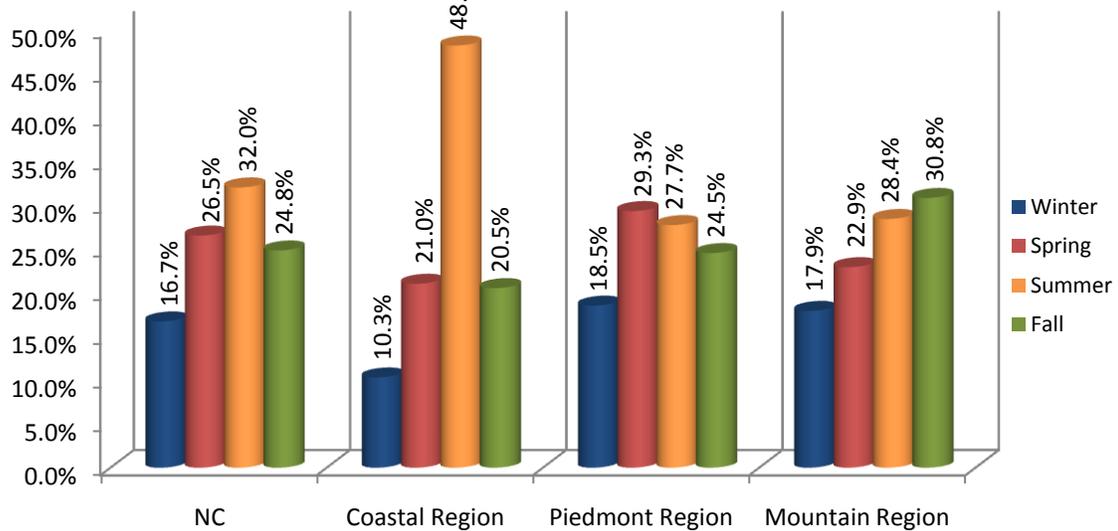
2009 Primary Purpose of Trip by Region



Travel Volume by Season

The seasonal distribution of regional visitors helps understand the flow of travelers through the state. The coastal region sees a larger proportion of total visitors during the summer; while the mountain region has a larger proportion of visitors during the summer and fall.

2009 Season of Travel by Region



Average Length of Stay

North Carolina	Coastal Region	Piedmont Region	Mountain Region
3.3 nights	4.4 nights	3.2 nights	3.2 nights

Travel Party Size

North Carolina	Coastal Region	Piedmont Region	Mountain Region
2.6 people	3.2 people	2.4 people	2.6 people

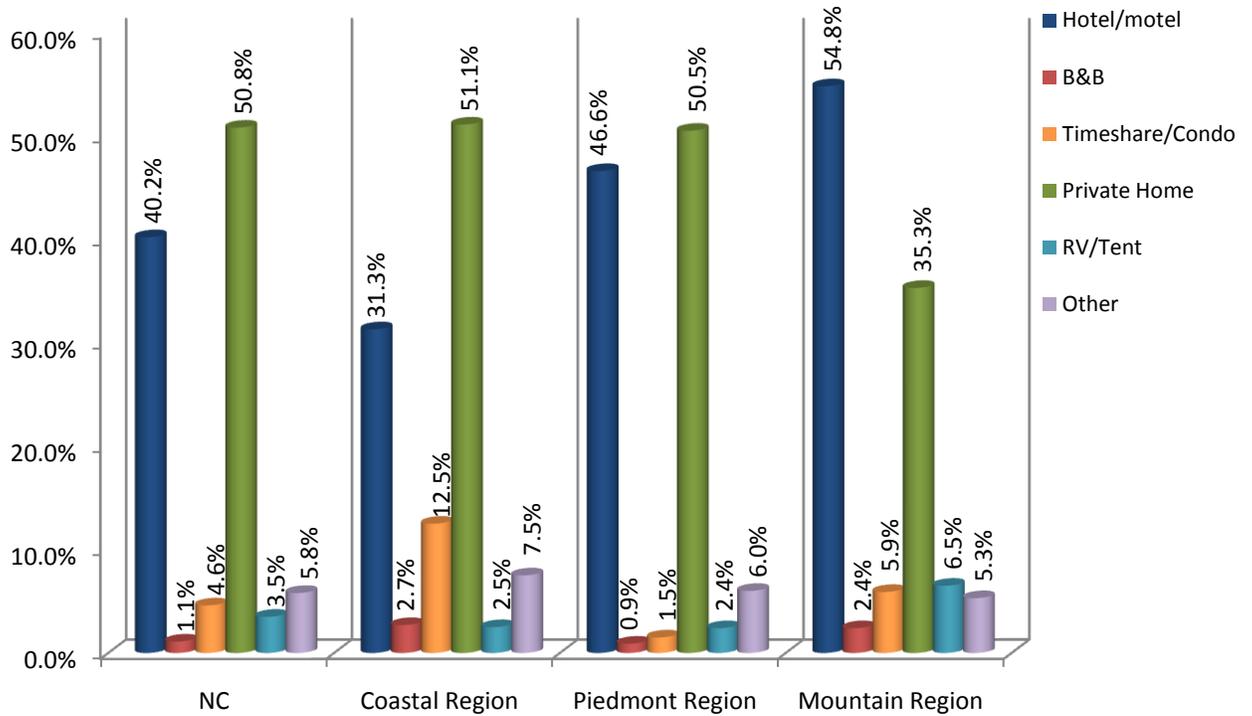
Children on Trip

North Carolina	Coastal Region	Piedmont Region	Mountain Region
27.4%	35.1%	23.5%	28.5%

Lodging Type

Hotels/motels and private homes are the most popular forms of lodging throughout the state, though the proportions vary by region. Mountain Region visitors make use of hotels/motels more often, while Coastal Region visitors tend to stay in private homes.

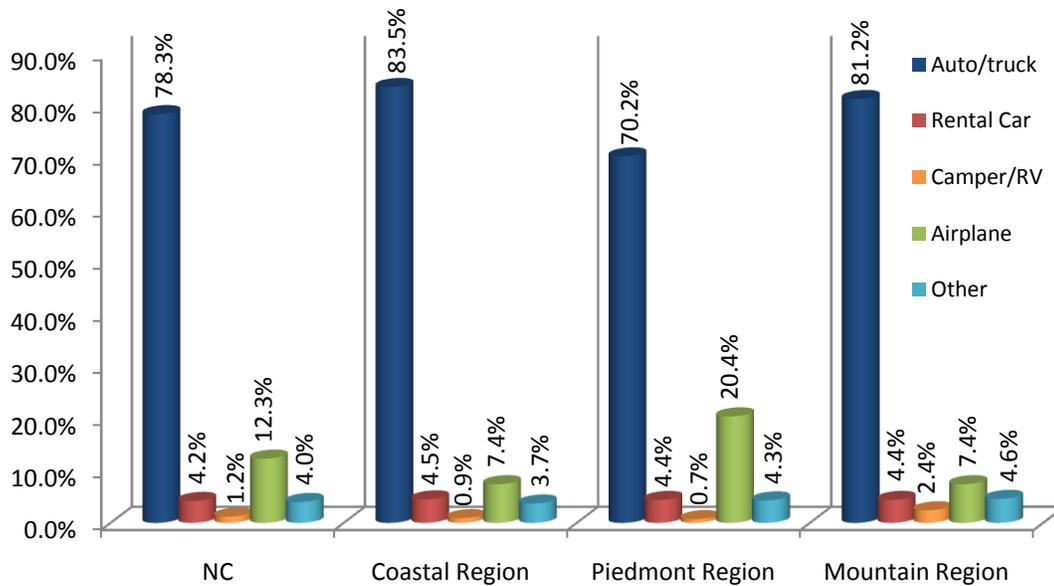
2009 Lodging by Overnight Visitors by Region



Mode of Transportation

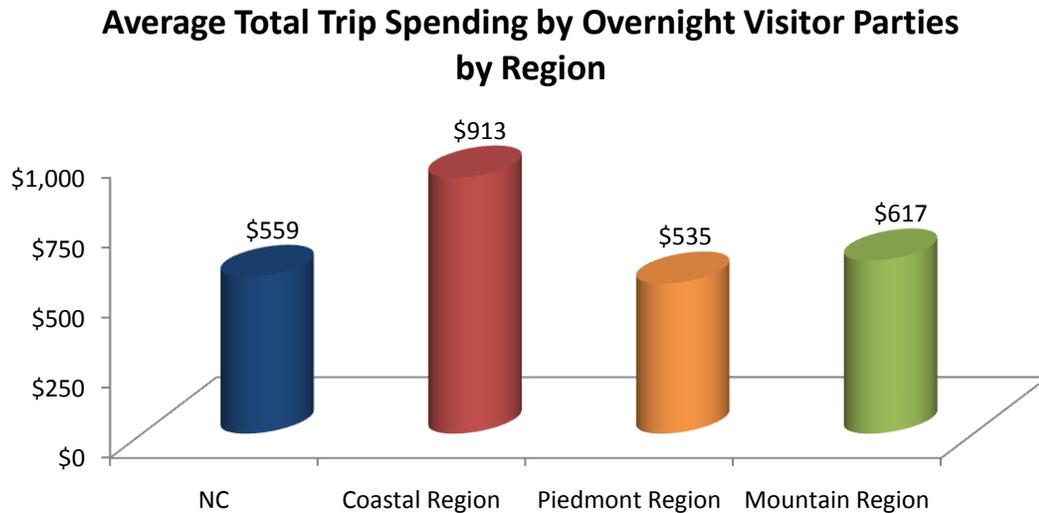
Not surprisingly, auto transportation was the primary use of travel by all of North Carolina visitors. The Piedmont Region, with the most and largest airports, saw the most travelers using air transportation (20.4%).

2009 Primary Transportation by Overnight Visitors
by Region



Trip Expenditures

Coastal Region visitor parties, on average, spent more than other regional visitors or NC in general. Visitors to this region stayed longer, explaining some of the increased spending.



Origin of Overnight Visitors

North Carolina is the top state of origin for all three regions of the state. In-state residents comprise around one-third of each region’s visitors. The other top states vary, though there is some overlap.

NC	Coastal Region	Piedmont Region	Mountain Region
North Carolina (36.1%)	North Carolina (42.9%)	North Carolina (29.3%)	North Carolina (30.5%)
Virginia (9.4%)	Virginia (13.9%)	Georgia (8.7%)	South Carolina (13.1%)
South Carolina (7.7%)	Maryland (5.4%)	Virginia (8.4%)	Tennessee (8.5%)
Georgia (6.6%)	New Jersey (5.0%)	New York (6.2%)	Florida (8.4%)
Florida (5.7%)	Pennsylvania (4.4%)	South Carolina (6.2%)	Georgia (7.9%)

Activities

Activities participated in by North Carolina overnight travelers vary by region, but common activities between regions include visiting friends and relatives, shopping and sightseeing. Mountain region visitors participate in more activities per trip than other regions.

NC	Coastal Region	Piedmont Region	Mountain Region
Visiting Relatives (34.6%)	Beach (68.8%)	Visiting Relatives (38.4%)	Rural Sightseeing (27.8%)
Visiting Friends (20.0%)	Visiting Relatives (28.8%)	Visiting Friends (21.6%)	Shopping (23.7%)
Shopping (19.3%)	Shopping (27.6%)	Shopping (20.2%)	Visiting Relatives (23.0%)
Beach (18.7%)	Visiting Friends (23.3%)	Rural Sightseeing (12.0%)	State/National Park (20.8%)
Rural Sightseeing (14.6%)	Rural Sightseeing (21.5%)	Fine Dining (11.0%)	Visiting Friends (19.0%)
Fine Dining (11.8%)	Historic Sites/Churches (20.4%)	Urban Sightseeing (10.1%)	Old Homes/Mansions (18.2%)
Historic Sites/Churches (8.6%)	Fine Dining (19.2%)	Museums (6.2%)	Historic Sites/Churches (16.9%)
State/National Park (8.6%)	State/National Park (15.7%)	Historic Sites/Churches (6.1%)	Fine Dining (16.8%)
Urban Sightseeing (7.3%)	Museums (13.7%)	Nightclub/Dancing (5.6%)	Urban Sightseeing (12.6%)
Museums (6.2%)	Fishing (11.0%)	Gardens (4.2%)	Wildlife Viewing (11.7%)
Wildlife Viewing (5.4%)	Wildlife Viewing (10.3%)	State/National Park (4.2%)	Casino/Gaming (10.9%)
Old Homes/Mansions (4.7%)	Urban Sightseeing (8.8%)	Special Events (3.9%)	Hiking/Backpacking (10.7%)
Fishing (4.4%)	Bird Watching (6.5%)	Family Reunion (3.8%)	Gardens (10.6%)
Gardens (4.4%)	Old Homes/Mansions (6.4%)	Old Homes/Mansions (3.2%)	Wine Tasting/Winery Tour (9.0%)
Hiking/Backpacking (4.1%)	Gardens (6.0%)	Youth/amateur/collegiate sporting events (3.0%)	Nature travel/Eco-touring (7.8%)

**2009 North Carolina Regional Travel Summary –
Coastal Region vs. Piedmont Region vs. Mountain Region**

Demographic Profile for Overnight Visitor Parties

	North Carolina	Coastal Region	Piedmont Region	Mountain Region
Average age of household head	45.5 years of age	45.6 years of age	46.4 years of age	46.3 years of age
Education of Household Head				
High school or less	16.0%	13.2%	14.6%	15.3%
Some college - no degree	24.4%	25.1%	22.7%	24.3%
Completed college	41.2%	44.7%	40.0%	39.8%
Post Graduate College	18.4%	17.1%	22.7%	20.6%
Annual Household Income				
Less than \$25,000	13.6%	9.8%	14.0%	15.5%
\$25,000-\$49,999	25.2%	26.9%	22.2%	25.2%
\$50,000-\$74,999	22.1%	21.9%	21.7%	21.4%
\$75,000 & over	39.1%	41.4%	42.1%	37.9%
Marital Status				
Married	62.1%	62.6%	60.9%	65.5%
Never married	17.9%	16.4%	21.7%	15.5%
Divorced, widowed, separated	20.1%	21.0%	17.4%	18.9%
Ethnicity				
White	84.2%	89.4%	79.2%	90.2%
Black/African American	11.3%	7.1%	14.7%	4.5%
Asian or Pacific Islander	1.2%	1.6%	1.5%	1.9%
Other	3.3%	1.9%	4.6%	3.4%

2009 Top Advertising Markets

The top ten advertising markets for the three regions are very similar, but differences can be noted in the ranks. While Raleigh-Durham is the primary market for the Coastal Region and the state as a whole, Charlotte is the top market for the Piedmont and Mountain Regions.

NC	Coastal Region
Raleigh-Durham-Fayetteville (12.3%)	Raleigh-Durham-Fayetteville (15.0%)
Charlotte (8.3%)	Charlotte (8.1%)
Greensboro-High Point-Winston Salem (7.2%)	Washington, DC (Hagerstown, MD) (7.7%)
Atlanta (5.2%)	Greensboro-High Point-Winston Salem (7.7%)
Washington, DC (Hagerstown, MD) (5.0%)	Norfolk-Portsmouth-Newport News (7.3%)
Greenville-Spartanburg-Asheville (4.9%)	New York (6.1%)
New York (4.3%)	Greenville-New Bern-Washington (5.8%)
Greenville-New Bern-Washington (3.8%)	Philadelphia (3.5%)
Norfolk-Portsmouth-Newport News (3.4%)	Richmond-Petersburg (3.3%)
Roanoke-Lynchburg (2.1%)	Wilmington (2.6%)
Piedmont Region	Mountain Region
Raleigh-Durham-Fayetteville (9.2%)	Greenville-Spartanburg-Asheville (11.4%)
Charlotte (7.2%)	Charlotte (9.5%)
Atlanta (6.4%)	Raleigh-Durham-Fayetteville (8.1%)
Washington DC (Hagerstown, MD) (5.8%)	Greensboro-High Point-Winston Salem (6.7%)
Greensboro-High Point-Winston Salem (5.7%)	Atlanta, GA (6.6%)
New York (5.5%)	Knoxville, TN (4.8%)
Greenville-New Bern-Washington (3.7%)	Columbia (3.3%)
Greenville-Spartanburg-Asheville (2.7%)	New York (3.2%)
Roanoke-Lynchburg (2.6%)	Tri-Cities, TN-VA (2.5%)
Philadelphia (2.3%)	Roanoke-Lynchburg (2.2%)

Note: Advertising markets defined by Nielsen's Designated Market Area (DMA)

2009 North Carolina Regional Travel Summary

Glossary of Terms

Travel	A trip over 50 miles one-way from home <i>or</i> any night away from home
Overnight Visitor	A visitor who spent at least one night away from home during travel
Daytripper	A visitor who did not spend any nights away from home, but traveled at least 50 miles one-way from home
Designated Market Area	Also referred to as a DMA and is a term used by Nielsen Media Research to identify an exclusive geographic area of counties in which the home market television stations hold a dominance of total hours viewed. There are 210 DMA's in the U.S.