



2009 North Carolina Visitor Profile

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

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2009 North Carolina Visitor Profile

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 report is to profile the average North Carolina visitor, both overnight visitors and daytrippers. At the end of the report, an appendix offers definitions of key travel terms.

2009 North Carolina Visitor Profile

Table of Contents

	Page
North Carolina Visitor Profile Summary	2
Overnight Visitor Profile Summary	3
Daytripper Visitor Profile Summary	11
Overnight/Daytripper Comparison	18
Glossary of Terms	25

2009 North Carolina Visitor Profile

Summary

- ◆ In 2009, approximately 35.9 million person-trips were taken in North Carolina. North Carolina ranked #6 in the US in terms of domestic visitation.
- ◆ Eighty percent of all domestic visitors came to North Carolina for pleasure purposes, while twelve percent of visitors came to conduct business (includes meeting/convention). The remaining eight percent indicated personal business or “other” reason for visiting the coast. In terms of overnight visitors to the state, eighty-three percent of domestic visitors came to North Carolina for pleasure purposes, while ten percent traveled for business purposes.
- ◆ The summer (June - August) was the most popular season for travel to North Carolina, with thirty-two percent of all 2009 visitors. Spring (March-May) and fall (September - November) followed with twenty-seven percent and twenty-five percent, respectively. The winter season (December-February) was the least visited with seventeen percent. June was the single largest month for travel to the state with almost twelve (11.9%) percent.
- ◆ Fifty-one percent of North Carolina visitors stayed in a private home while forty percent lodged at a hotel/motel. Almost five (4.6%) percent stayed in a timeshare or condo.
- ◆ The average travel party size for all North Carolina visitor parties was 2.7 people. Twenty-eight percent of travel parties to the state included children in the party.
- ◆ Eighty-six percent of overnight travelers to the state drove (includes personal automobile, rental, motorcycle and RV), while ten percent traveled by air.
- ◆ In 2009, the average household trip expenditure by visitors to North Carolina was \$434. The average household trip expenditure for overnight visitors was \$559. Daytrip parties to the state spent approximately \$149 per visit.
- ◆ The top states of origin of *total* visitors to North Carolina were in-state residents (44.9%), Virginia (8.7%), South Carolina (8.2%), Georgia (6.1%), Florida (4.5%) and New York (3.3%).
- ◆ Fifty-seven percent of the households that traveled to North Carolina in 2009 had a household income over \$50,000.
- ◆ In 2009, Raleigh/Durham/Fayetteville (13.8%) was the top advertising market of origin for *all* travelers to the state, followed by Charlotte (10.8%), Greensboro/High Point/Winston Salem (8.7%), Greenville-Spartanburg-Asheville (6.6%), Greenville-New Bern-Washington (5.3%), Atlanta (4.6%), Washington, DC (3.9%), New York (3.5%) and Norfolk-Portsmouth-Newport News (3.5%).

2009 North Carolina Overnight Visitor Profile

Summary

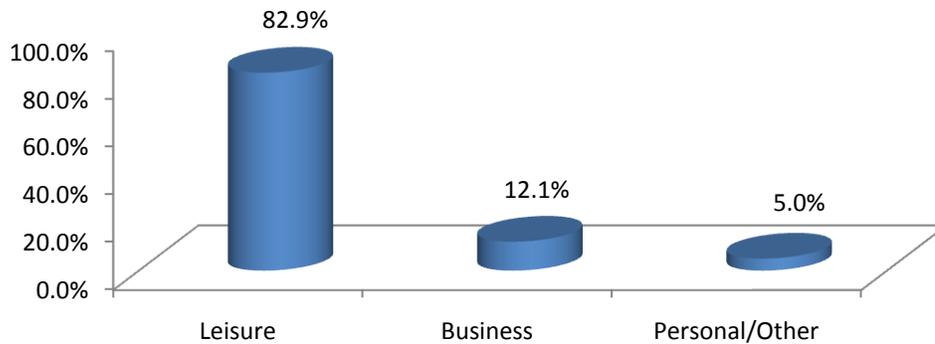
- ◆ In 2009, approximately 27.8 million overnight person-trips were taken in North Carolina. North Carolina ranked #6 in the US in terms of domestic overnight visitation.
- ◆ Eighty-three percent of all domestic overnight visitors came to North Carolina for pleasure purposes, while twelve percent of 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 overnight travel to North Carolina, with thirty-five percent of all 2009 overnight visitors. Spring (March-May) and fall (September - November) followed with twenty-six percent and twenty-four percent, respectively. The winter season (December-February) was the least visited with fifteen percent. June was the single largest month for travel to the state with over thirteen (13.2%) percent.
- ◆ Overnight visitors to North Carolina spent an average of 3.3 nights in the state in 2009.
- ◆ Fifty-one percent of North Carolina visitors stayed in a private home while forty percent lodged at a hotel/motel. Almost five (4.6%) percent stayed in a timeshare or condo.
- ◆ The average travel party size for all overnight North Carolina visitor parties was 2.6 people. Twenty-seven percent of overnight travel parties to the state included children in the party.
- ◆ Eighty-four percent of overnight travelers to the state drove (includes personal automobile, rental, motorcycle and RV), while twelve percent traveled by air.
- ◆ In 2009, the average household trip expenditure for overnight visitors was \$559.
- ◆ The top states of origin of *overnight* visitors to North Carolina were in-state residents (36.1%), Virginia (9.4%), South Carolina (7.7%), Georgia (6.6%), Florida (5.7%) and New York (4.0%).
- ◆ Sixty-one percent of the households that traveled overnight to North Carolina in 2009 had a household income over \$50,000.
- ◆ In 2009, Raleigh/Durham/Fayetteville (12.3%) was the top advertising market of origin for *overnight* travelers to the state, followed by Charlotte (8.3%), Greensboro/High Point/Winston Salem (7.2%), Atlanta (5.2%), Washington, DC (5.0%), Greenville-Spartanburg-Asheville (4.9%) and New York (4.3%).

North Carolina Overnight Visitor Profile

Main Purpose of Visit

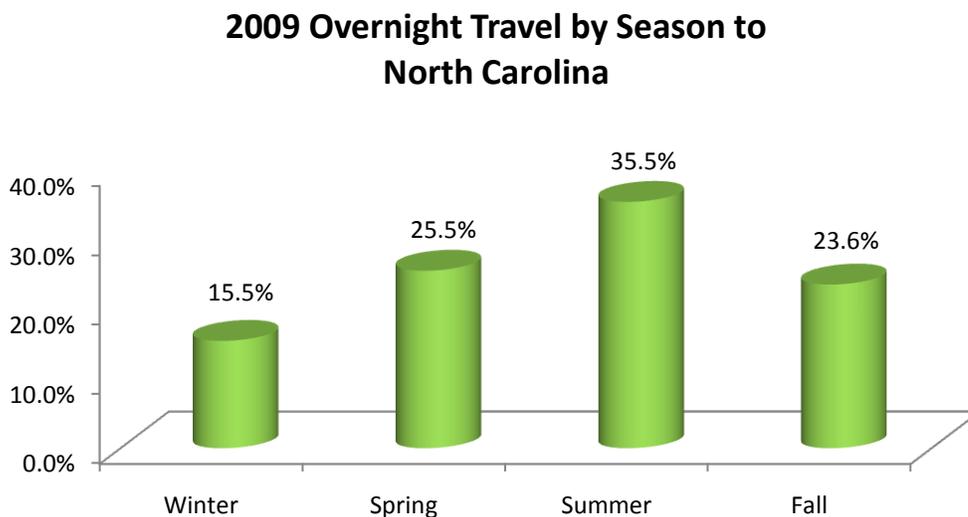
In 2009, almost nine out of ten (82.9%) of domestic overnight visitors came to North Carolina for leisure purposes, which included visiting friends and relatives, outdoor recreation and entertainment/sightseeing. Twelve percent (12.1%) of domestic overnight visitors came for general business, convention, seminar or other group meeting, while five percent traveled to the state to conduct personal or “other” business.

2009 Primary Purpose of Overnight Trip to North Carolina



Travel Volume by Season

When examining overnight visitation based on the typical seasonal schedule, the summer (June through August) with over thirty-five percent, was the most popular season of the year for overnight travel to North Carolina. The spring (March through May) with nearly twenty-six percent and fall (September through November) with twenty-four percent followed. The winter season (December through February) accounted for just over fifteen percent of overnight visitors to North Carolina.



Average Length of Stay

In 2009, an average of 3.3 nights was spent by visitors to North Carolina.

Travel Party Size

The average travel party size for all North Carolina overnight visitors was 2.6 people.

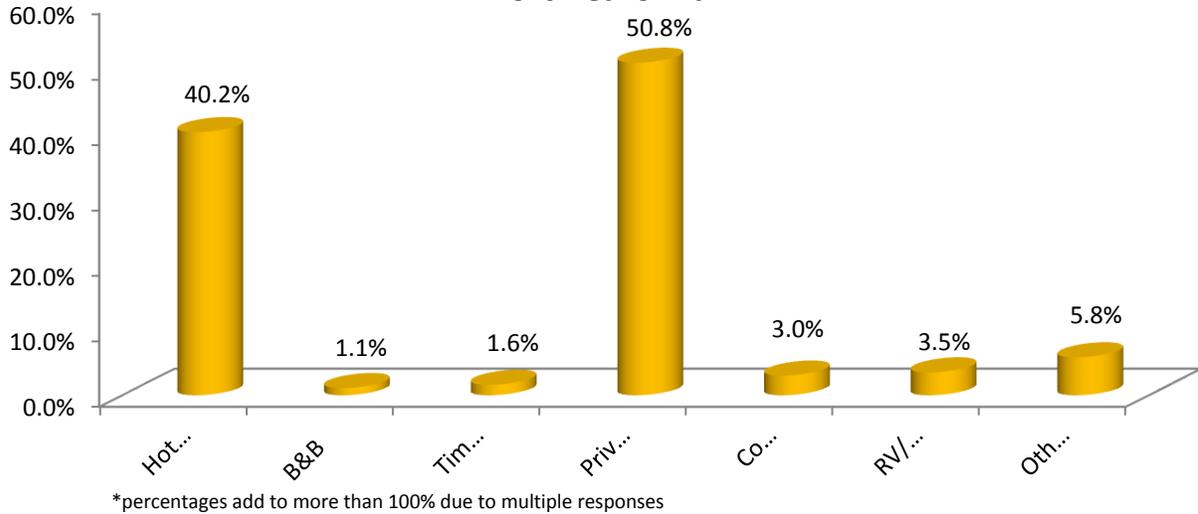
Children on Trip

Twenty-seven percent of overnight visitor parties to North Carolina included children. Among those who traveled with children, the average number of children on trips was 2.0.

Lodging Used in North Carolina

In 2009, over one-half of North Carolina visitors stayed in a private home (50.8%). Forty percent lodged at a hotel/motel and three percent stayed in a condo.

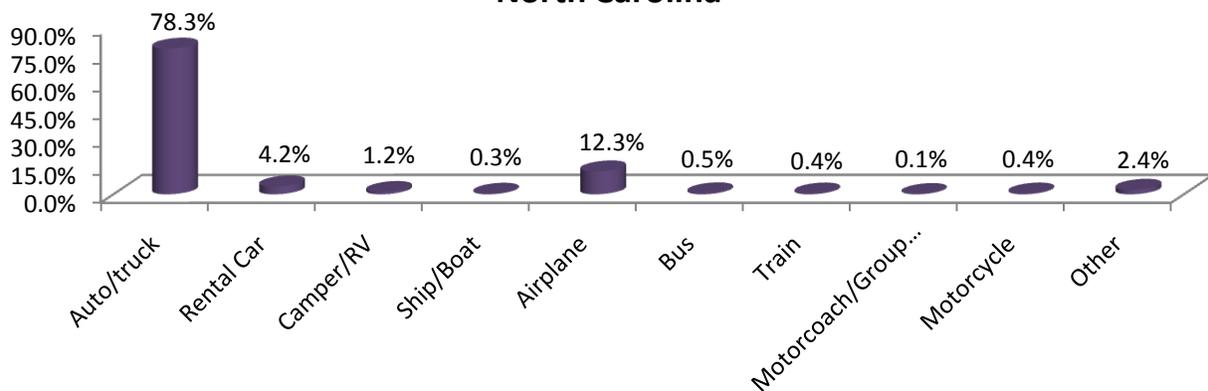
2009 Lodging by Overnight Visitors to North Carolina



Mode of Transportation

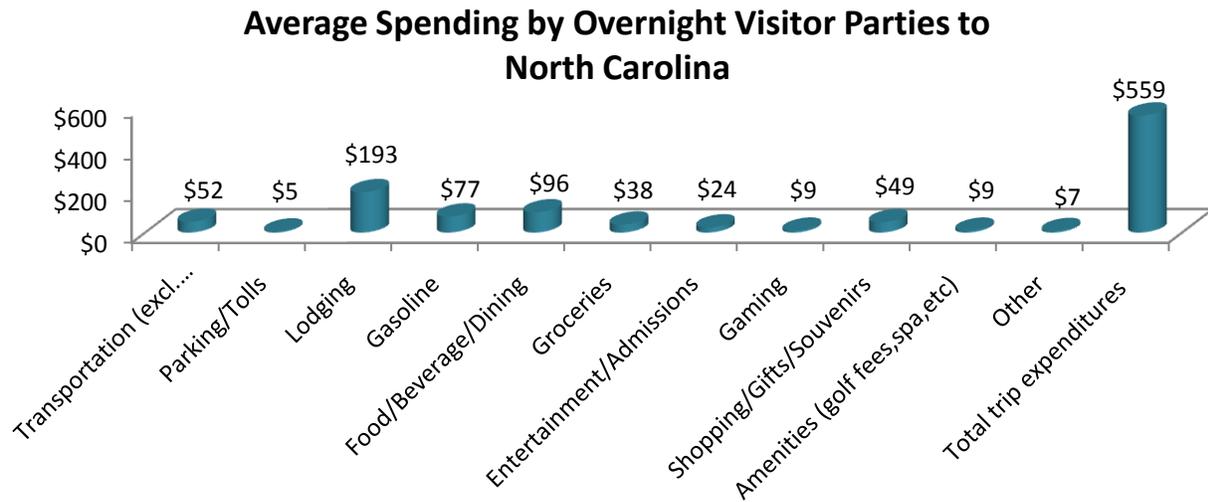
In 2009, the personal auto was by far the dominant form of transportation (78.3%) to the state, while twelve percent traveled by air.

2009 Primary Mode of Transportation to North Carolina



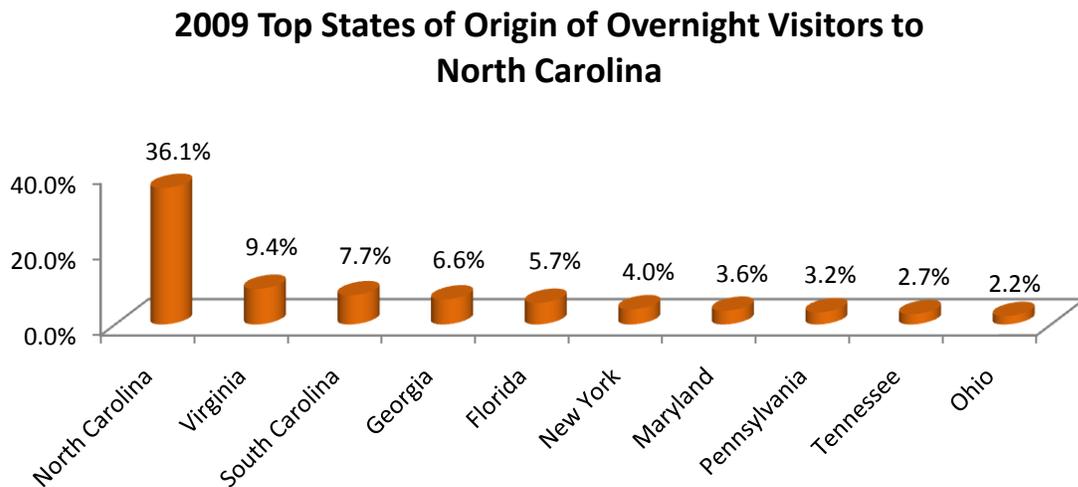
Expenditures by North Carolina Visitors

The average overnight visitor party spending in the state was \$559.



Origin of Visitors

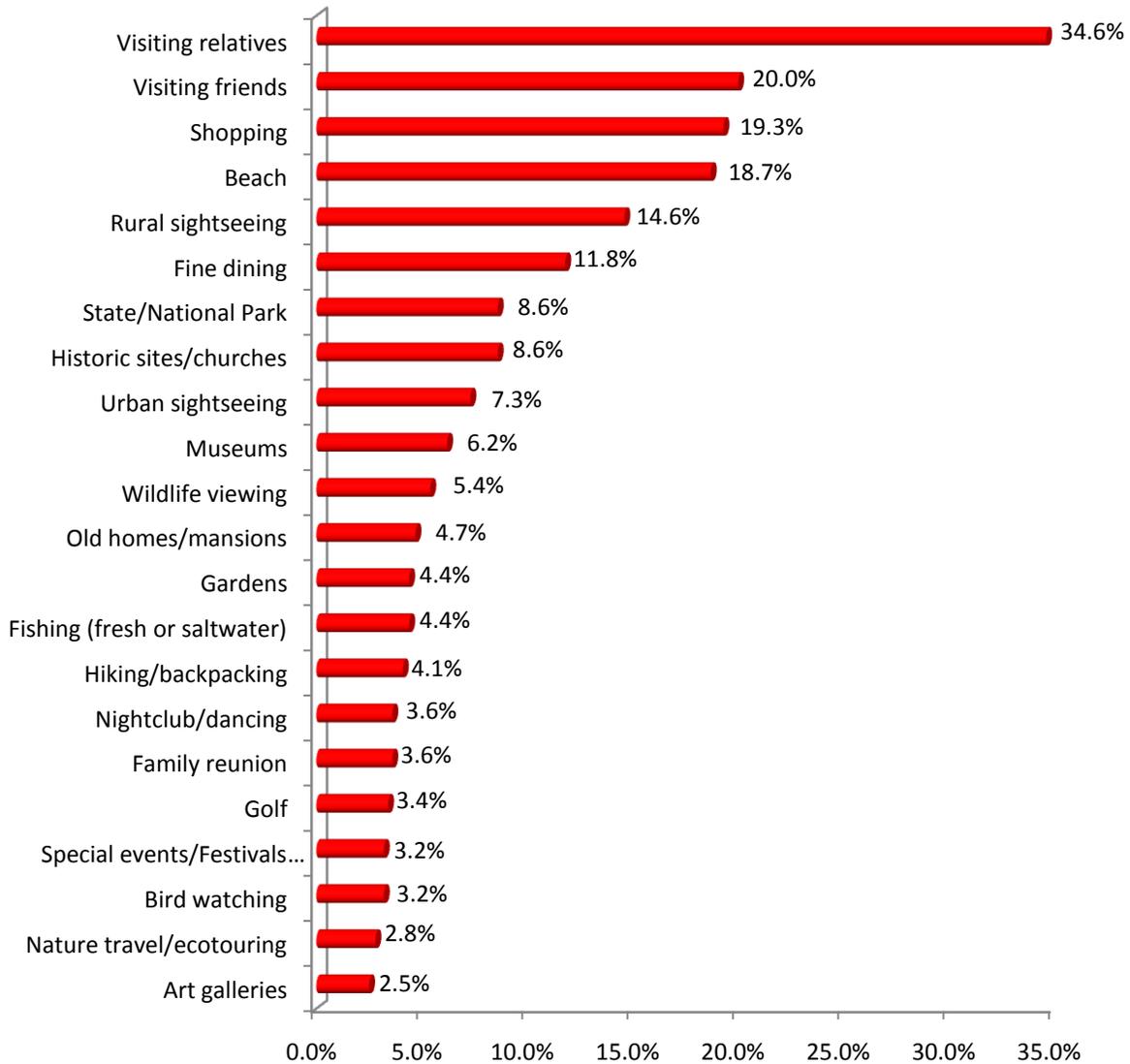
In 2009, the top states of origin for North Carolina overnight visitors included North Carolina (36.1%), Virginia (9.4%), South Carolina (7.7%), Georgia (6.6%), Florida (5.7%) and New York (4.0%).



Activities

Over one-thirds (34.6%) of the overnight visitors to North Carolina visited relatives while traveling to the state. About one-fifth visited friends (20.0%) and shopped (19.3%) while visiting. Other popular activities included visiting a beach (18.7%), rural sightseeing (14.6%), fine dining (11.8%), visiting historic sites/churches (8.6%), and visiting state/national parks (8.6%).

2009 Activities Participated in by Overnight Visitors to North Carolina



Demographic Profile of North Carolina Overnight Visitors

The North Carolina overnight visitor gender breakdown is sixty percent female and forty percent male. More than half (62.1%) 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 overnight visitors classify themselves as white (84.2%), and over eleven percent classify themselves as black/African American.

Over half (59.6%) of North Carolina overnight visitor parties have a household head with a college degree or higher. The average visitor is 46 years old, with over half (50.5%) being 45 years old or older.

Nearly forty percent (39.1%) of the visitor parties that traveled to North Carolina 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** were Raleigh-Durham-Fayetteville (12.3%), Charlotte (8.3%), Greensboro-Winston-Salem-High Point (7.2%), Atlanta (5.2%), Washington DC (5.0%), and Greenville-Spartanburg-Asheville (4.9%). Advertising markets correspond with Nielsen's Designated Market Areas (DMAs).

Top Advertising Markets of Origin for 2009 North Carolina *Overnight* Visitors

DMA of Origin	Percentage of Total Overnight Visitors
Raleigh-Durham (Fayetteville)	12.3%
Charlotte	8.3%
Greensboro-High Point-Winston Salem	7.2%
Atlanta	5.2%
Washington DC (Hagerstown, MD)	5.0%
Greenville-Spartanburg-Asheville-Anderson	4.9%
New York, NY	4.3%
Greenville-New Bern-Washington	3.8%
Norfolk-Portsmouth-Newport News	3.4%
Roanoke-Lynchburg	2.1%
Philadelphia, PA	2.0%
Wilmington	1.7%
Richmond-Petersburg, VA	1.7%
Orlando-Daytona Beach-Melbourne	1.6%
Columbia, SC	1.5%
Myrtle Beach-Florence	1.5%

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

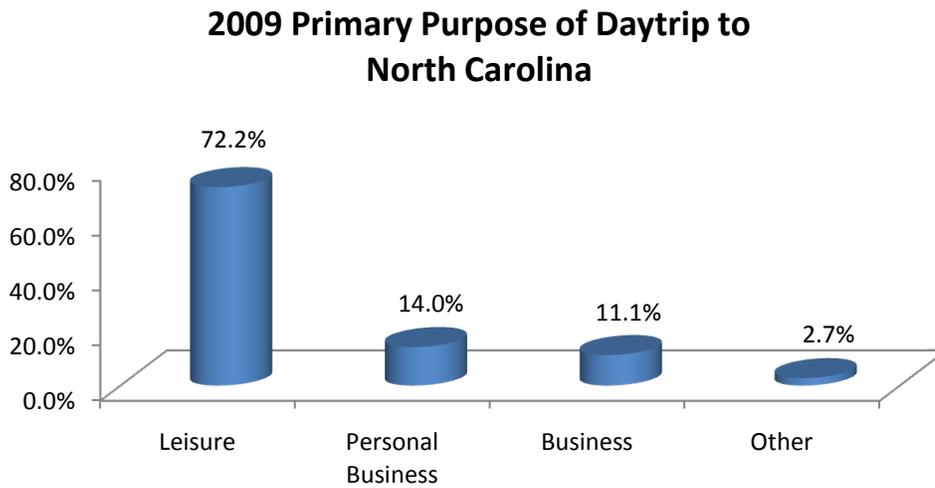
2009 North Carolina Daytrip Visitor Profile

Summary

- ◆ A daytripper is defined as a visitor who did not spend any nights away from home, but traveled at least 50 miles one-way from home. In 2009, approximately 8 million daytrips were taken in North Carolina. North Carolina ranked #7 in the US in terms of daytrip visitation.
- ◆ Seventy-two percent of all daytrippers visited North Carolina for pleasure purposes, while eleven percent of visitors came to conduct business (includes meeting/convention). Fourteen percent of daytrippers indicated that “personal business” was the reason for visiting the state. The remaining three percent indicated an “other” reason for visiting the state.
- ◆ The spring (March-May) was the most popular season for day travel to North Carolina, with thirty percent of all 2009 daytrippers, followed closely by the fall season (September - November) with twenty-nine percent. Winter (December-February) and summer (June - August) each accounted for twenty-one percent of annual daytrippers to the state. December was the single largest month for day travel to the state with twelve percent.
- ◆ The average travel party size for daytrip visitor parties to North Carolina was 2.9 people. Twenty-nine percent of travel parties to the state included children in the party.
- ◆ Ninety-three percent of daytrippers to the state drove (includes personal automobile, rental, motorcycle and RV).
- ◆ In 2009, the average household trip expenditure for daytrip parties to the state was approximately \$149 per visit.
- ◆ The top states of origin of *daytrippers* to North Carolina were in-state residents (63.7%), and the neighboring states of South Carolina (9.2%), Virginia (7.3%), Georgia (5.0%), and Tennessee (3.5%).
- ◆ Forty-two percent of the households that traveled to North Carolina on a daytrip in 2009 had a household income over \$50,000.
- ◆ In 2009, Charlotte (19.4%) was the top advertising market of origin for *daytrippers* to the state, followed by Raleigh/Durham/Fayetteville (18.8%), Greensboro/High Point/Winston Salem (13.9%), Greenville-Spartanburg-Asheville (12.2%), and Greenville-New Bern-Washington (10.2%).

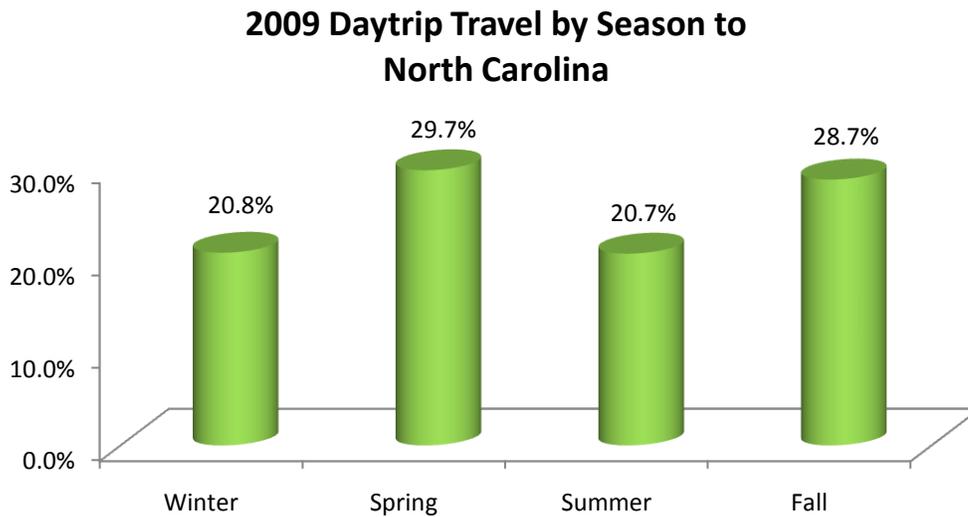
Main Purpose of Visit

In 2009, over seventy percent (72.2%) of daytrippers visited North Carolina for leisure purposes, which included visiting friends and relatives, outdoor recreation and entertainment/sightseeing. Fourteen percent of daytrippers traveled to or within the state for personal business and eleven percent of daytrippers came for general business, convention, seminar or other group meeting.



Travel Volume by Season

When examining visitation based on the typical seasonal schedule, the spring and fall were the most popular seasons for daytrips to or within North Carolina with thirty percent and twenty-nine percent of daytrippers respectively. The summer (June through August) and winter (December through February) each had twenty-one percent of the annual North Carolina daytrippers.



Travel Party Size

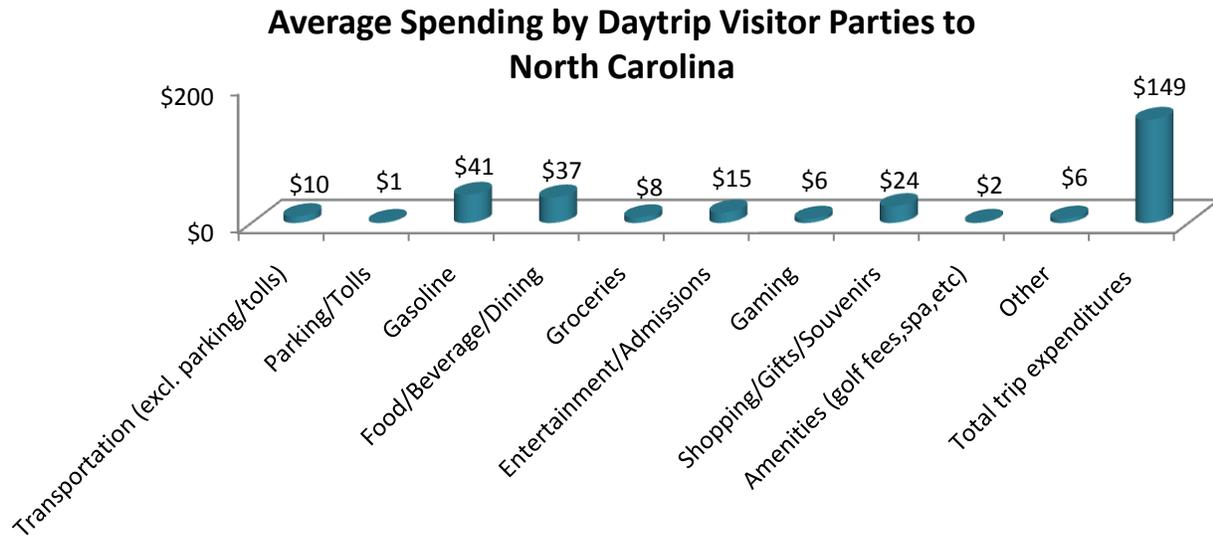
The average travel party size for all North Carolina daytrippers was 2.9 people.

Children on Trip

Twenty-nine percent of daytrip parties to North Carolina included children. Among those who traveled with children, the average number of children on trips was 2.0.

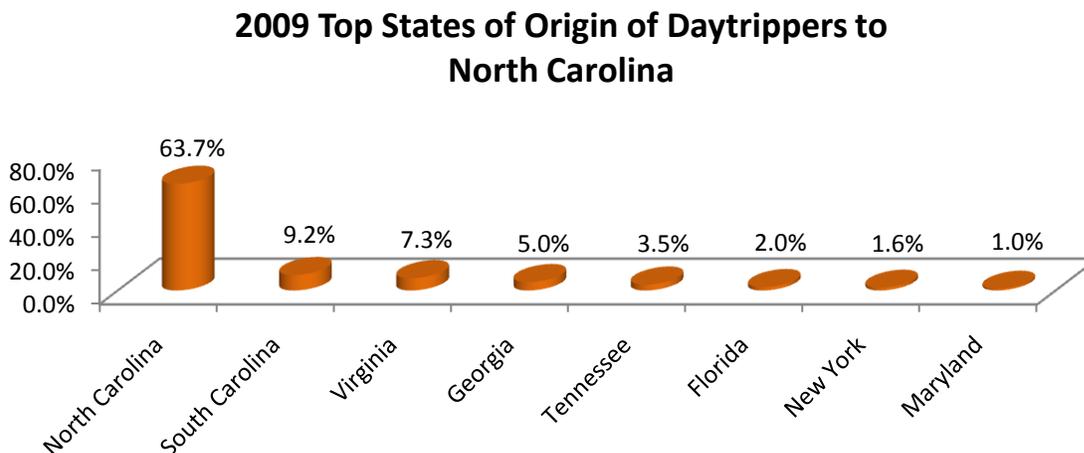
Expenditures by North Carolina Daytrippers

The average overnight visitor party spending in the state was \$149.



Origin of Visitors

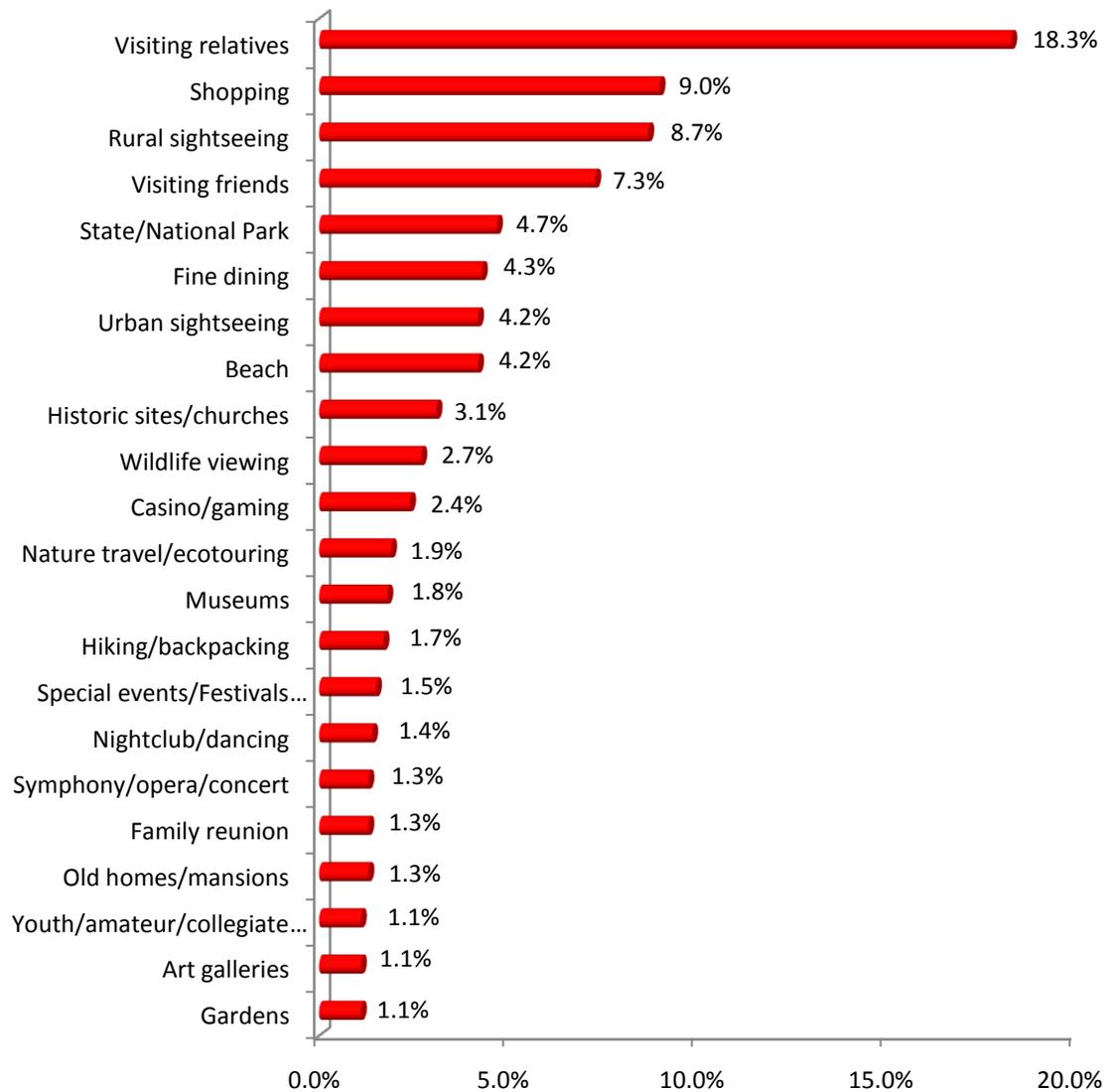
Not surprisingly, the top states of origin for North Carolina daytrippers were in-state residents and those from states contiguous to the state; North Carolina (63.7%), South Carolina (9.2%), Virginia (7.3%), Georgia (5.0%), and Tennessee (3.5%). Florida represented two percent of daytrippers to North Carolina, presumably those travelers enjoying sites and activities during their time passing through the state.



Activities

Nearly twenty percent (18.3%) of the daytrippers to North Carolina visited relatives while on a daytrip in the state. Nine percent shopped and participated in rural sightseeing, while seven percent visited friends.

2009 Activities Participated in by Daytrippers to North Carolina



Demographic Profile of North Carolina Daytrip Visitors

The North Carolina daytripper gender breakdown is sixty percent female and forty percent male. More than half (57.5%) of the visitors are married and just over one-fourth of the region's visitors are divorced, widowed or separated.

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

Over half (50.3%) of North Carolina daytrippers have a household head with a college degree or higher. The average visitor is 47 years old, with over half (56.1%) being 45 years old or older.

Over twenty percent (22.7%) of the daytrip visitor parties that traveled to North Carolina in 2009 had a household income \$75,000 or over. Five percent had a household income of over \$125,000.

2009 Top Advertising Markets

In 2009, the top advertising markets sending daytrippers to **North Carolina** were Charlotte (19.4%), Raleigh-Durham-Fayetteville (18.8%), Greensboro-Winston-Salem-High Point (13.9%), Greenville-Spartanburg-Asheville (12.2%), and Greenville-New Bern-Washington (10.2%). Advertising markets correspond with Nielsen's Designated Market Areas (DMAs).

Top Advertising Markets of Origin for 2009 North Carolina *Daytrippers*

DMA of Origin	Percentage of Total Daytrip Visitors
Charlotte	19.4%
Raleigh-Durham (Fayetteville)	18.8%
Greensboro-High Point-Winston Salem	13.9%
Greenville-Spartanburg-Asheville-Anderson	12.2%
Greenville-New Bern-Washington	10.2%
Norfolk-Portsmouth-Newport News	3.8%
Roanoke-Lynchburg	3.4%
Tri-Cities, TN-VA	2.8%
Atlanta	2.5%
Wilmington	2.3%
Columbia, SC	1.4%
Knoxville	1.4%
Myrtle Beach-Florence	1.3%
Richmond-Petersburg	1.2%

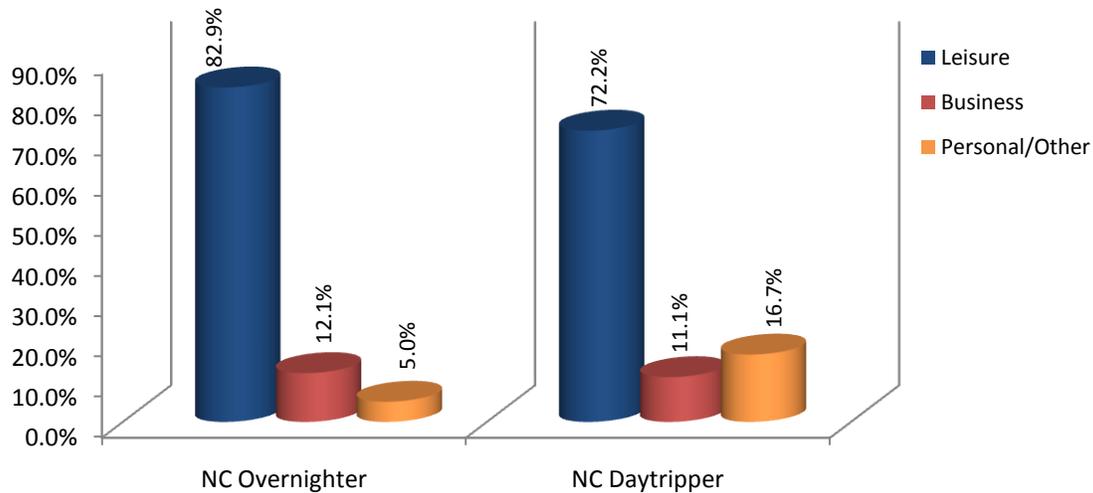
Note: Advertising markets defined by Nielsen's Designated Market Area (DMA)

2009 Overnight vs. Daytrip Comparison

The following section provides comparisons and contrasts of North Carolina’s overnight and day visitors.

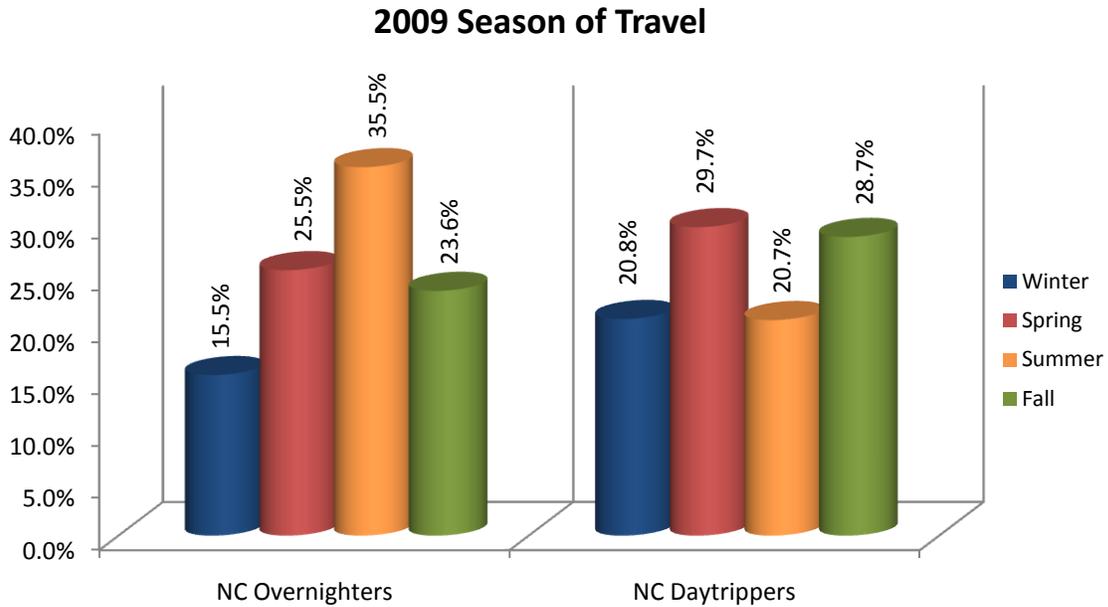
Though leisure is the predominant reason for travel to North Carolina for overnights and daytrippers, a larger share of overnights to North Carolina travel to the state for leisure and than daytrippers. Daytrippers are more likely than overnights to visit the state for personal purposes.

2009 Primary Purpose of Trip



Travel Volume by Season

The seasonal distribution of visitors helps understand the flow of travelers through the state. Overnighters are more likely to visit during the summer, while the spring and fall are the top seasons for daytrippers to the state.



Travel Party Size

North Carolina Overnighters	North Carolina Daytrippers
2.6 people	2.9 people

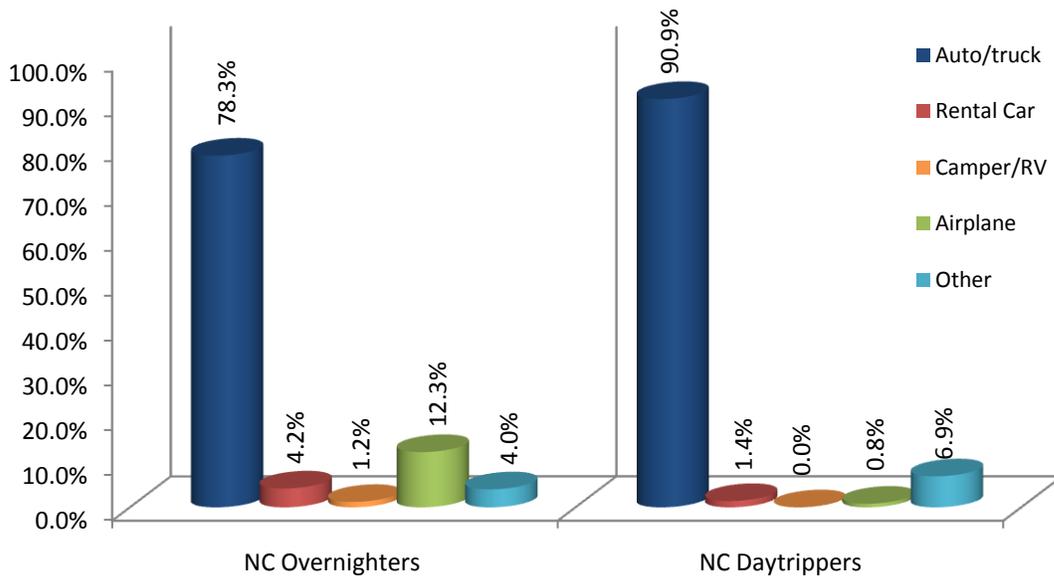
Children on Trip

North Carolina Overnighters	North Carolina Daytrippers
27.4%	28.6%

Mode of Transportation

Not surprisingly, auto transportation was the primary use of travel by all of North Carolina visitors, both overnights and daytrippers.

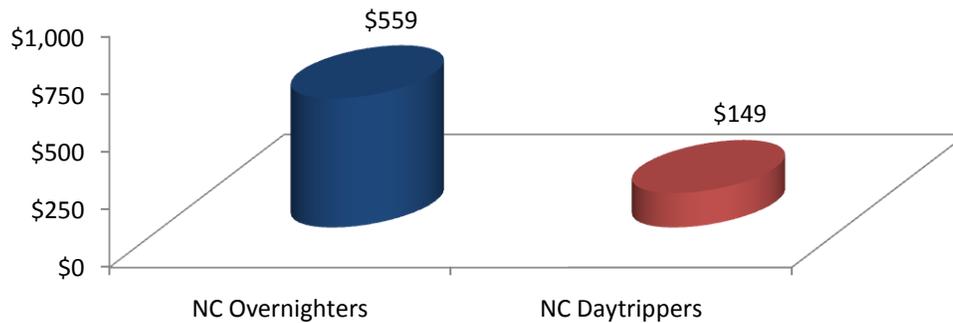
2009 Primary Transportation by Overnight Visitors



Trip Expenditures

Overnighters to North Carolina spend about \$400 more per trip than daytrippers.

Average Total Trip Spending by Overnight and Daytrip Visitor Parties



Origin of Visitors

North Carolina is the top state of origin for both overnighters and daytrippers to the state. In-state residents comprise around one-third of the state’s overnight visitors and nearly two-thirds of the state’s daytrippers.

NC Overnighters	NC Daytrippers
North Carolina (36.1%)	North Carolina (63.7%)
Virginia (9.4%)	Virginia (7.3%)
South Carolina (7.7%)	South Carolina (9.2%)
Georgia (6.6%)	Georgia (5.0%)
Florida (5.7%)	Florida (2.0%)
New York (4.0%)	Tennessee (3.5%)

Activities

Activities participated in by North Carolina travelers vary by their length of stay, but common activities between regions include visiting friends and relatives, shopping and sightseeing.

NC Overnights	NC Daytrippers
Visiting Relatives (34.6%)	Visiting Relatives (18.3%)
Visiting Friends (20.0%)	Shopping (9.0%)
Shopping (19.3%)	Rural Sightseeing (8.7%)
Beach (18.7%)	Visiting Friends (7.3%)
Rural Sightseeing (14.6%)	State/National Park (4.7%)
Fine Dining (11.8%)	Fine Dining (4.3%)
Historic Sites/Churches (8.6%)	Beach (4.2%)
State/National Park (8.6%)	Urban Sightseeing (4.2%)
Urban Sightseeing (7.3%)	Historic Sites/Churches (3.1%)
Museums (6.2%)	Wildlife Viewing (2.7%)
Wildlife Viewing (5.4%)	Casino/Gaming (2.4%)
Old Homes/Mansions (4.7%)	Nature travel/Ecotouring (1.9%)
Fishing (4.4%)	Museums (1.8%)
Gardens (4.4%)	Hiking/Backpacking (1.7%)
Hiking/Backpacking (4.1%)	Special Events/Festivals (1.5%)
Family Reunion (3.6%)	Nightclub/Dancing (1.4%)
Nightclub/Dancing (3.6%)	Old Homes/Mansions (1.3%)
Golf (3.4%)	Family Reunion (1.3%)
Bird Watching (3.2%)	Symphony/opera/concert (1.3%)
Special Events/Festivals (3.2%)	Gardens (1.1%)
Nature travel/ecotouring (2.8%)	Art Galleries (1.1%)
Art Galleries (2.5%)	Youth/amateur/collegiate sporting events (1.1%)

Demographic Profile for North Carolina Visitors

	North Carolina Overnighters	North Carolina Daytrippers
Average age of household head	45.5 years of age	47.2 years of age
Education of Household Head		
High school or less	16.0%	21.3%
Some college - no degree	24.4%	28.4%
Completed college	41.2%	38.8%
Post Graduate College	18.4%	11.5%
Annual Household Income		
Less than \$25,000	13.6%	19.5%
\$25,000-\$49,999	25.2%	38.0%
\$50,000-\$74,999	22.1%	19.8%
\$75,000 & over	39.1%	22.7%
Marital Status		
Married	62.1%	57.5%
Never married	17.9%	16.2%
Divorced, widowed, separated	20.1%	26.3%
Ethnicity		
White	84.2%	79.2%
Black/African American	11.3%	16.2%
Asian or Pacific Islander	1.2%	0.8%
Other	3.3%	3.8%

2009 Top Advertising Markets

The top ten advertising markets for the overnights and daytrippers very similar, but differences can be noted in the ranks. While Raleigh-Durham is the primary market for the overnights, Charlotte is the top market for daytrippers.

NC Overnights	NC Daytrippers
Raleigh-Durham-Fayetteville (12.3%)	Charlotte (19.4%)
Charlotte (8.3%)	Raleigh-Durham-Fayetteville (18.8%)
Greensboro-High Point-Winston Salem (7.2%)	Greensboro-High Point-Winston Salem (13.9%)
Atlanta (5.2%)	Greenville-Spartanburg-Asheville (12.2%)
Washington, DC (Hagerstown, MD) (5.0%)	Greenville-New Bern-Washington (10.2%)
Greenville-Spartanburg-Asheville (4.9%)	Norfolk-Portsmouth-Newport News (3.8%)
New York (4.3%)	Roanoke-Lynchburg (3.4%)
Greenville-New Bern-Washington (3.8%)	Tri-Cities, TN-VA (2.8%)
Norfolk-Portsmouth-Newport News (3.4%)	Atlanta (2.5%)
Roanoke-Lynchburg (2.1%)	Wilmington (2.3%)

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.