



# **2010 North Carolina Visitor Profile**

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

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## **2010 North Carolina Visitor Profile**

The North Carolina Division of Tourism, Film and Sports Development has contracted with the research company TNS for five 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.

# 2010 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

## 2010 North Carolina Visitor Profile

### Summary

- ◆ In 2010, approximately 36.8 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 state. In terms of overnight visitors to the state, eighty-three percent of domestic visitors came to North Carolina for pleasure purposes, while twelve percent traveled for business purposes.
- ◆ The summer (June - August) was the most popular season for travel to North Carolina, with thirty-five percent of all 2010 visitors. Spring (March-May) and fall (September - November) followed with twenty-four percent and twenty-two percent, respectively. The winter season (December-February) was the least visited with eighteen percent. June was the single largest month for travel to the state with over thirteen (13.5%) percent.
- ◆ Forty-eight percent of North Carolina visitors stayed in a private home while forty-five percent lodged at a hotel/motel. Five percent stayed in a timeshare or condo.
- ◆ The average travel party size for all North Carolina visitor parties was 2.0 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 2010, the average household trip expenditure by visitors to North Carolina was \$406. The average household trip expenditure for overnight visitors was \$502. Daytrip parties to the state spent approximately \$187 per visit.
- ◆ The top states of origin of *total* visitors to North Carolina were in-state residents (43.2%), South Carolina (10.2%), Virginia (9.0%), Florida (5.4%), Georgia (5.0%), and New York (3.0%).
- ◆ Sixty percent of the households that traveled to North Carolina in 2010 had a household income over \$50,000.
- ◆ In 2010, Raleigh/Durham/Fayetteville (14.7%) was the top advertising market of origin for *all* travelers to the state, followed by Charlotte (10.5%), Greensboro/High Point/Winston Salem (8.0%), Greenville-Spartanburg-Asheville (5.8%), Greenville-New Bern-Washington (5.2%), Atlanta (3.6%), New York (3.6%) Washington, DC (3.3%), and Norfolk-Portsmouth-Newport News (3.2%).

## 2010 North Carolina Overnight Visitor Profile

### Summary

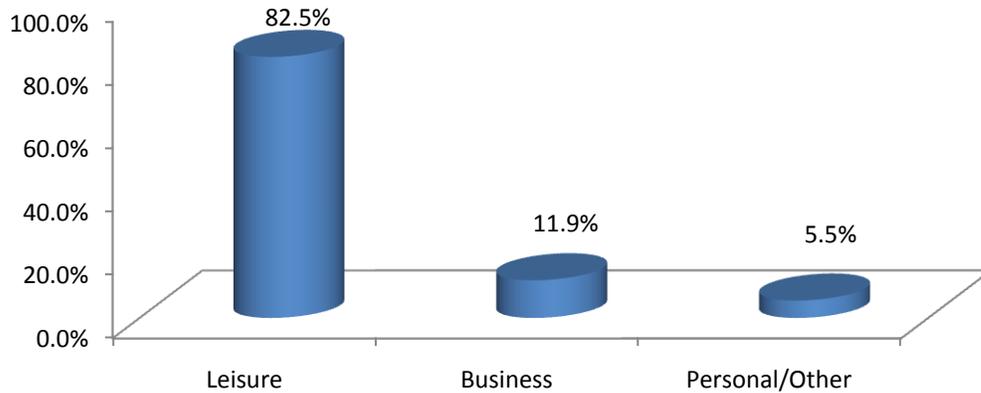
- ◆ In 2010, approximately 28.9 million overnight person-trips were taken in North Carolina. North Carolina ranked #6 in the US in terms of domestic overnight visitation.
- ◆ Eighty-three percent of all domestic overnight visitors came to North Carolina for pleasure purposes, while twelve percent of visitors came to conduct business (includes meeting/convention). The remaining five percent indicated personal business or “other” reason for visiting the state.
- ◆ The summer (June - August) was the most popular season for overnight travel to North Carolina, with thirty-seven percent of all 2010 overnight visitors. Spring (March-May) and fall (September - November) followed with twenty-four percent and twenty-two percent, respectively. The winter season (December-February) was the least visited with eighteen percent. July was the single largest month for travel to the state with over thirteen (13.7%) percent.
- ◆ Overnight visitors to North Carolina spent an average of 3.3 nights in the state in 2010.
- ◆ Forty-eight percent of North Carolina visitors stayed in a private home while forty-five percent lodged at a hotel/motel. Five percent stayed in a timeshare or condo.
- ◆ The average travel party size for all overnight North Carolina visitor parties was 2.1 people. Twenty-nine 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 over twelve percent (12.5%) traveled by air.
- ◆ In 2010, the average household trip expenditure for overnight visitors was \$502.
- ◆ The top states of origin of *overnight* visitors to North Carolina were in-state residents (35.0%), Virginia (9.8%), South Carolina (7.6%), Florida (7.3%), Georgia (5.6%), and New York (4.3%). The proportion of overnight visitors from Florida increased from 5.7% in 2009 to 7.3% in 2010.
- ◆ Sixty-four percent of the households that traveled overnight to North Carolina in 2010 had a household income over \$50,000, and a quarter (25%) of them had an income of over \$100,000.
- ◆ In 2010, Raleigh/Durham/Fayetteville (13.1%) was the top advertising market of origin for *overnight* travelers to the state, followed by Charlotte (8.5%), Greensboro/High Point/Winston Salem (5.9%), New York (4.6%), Greenville-Spartanburg-Asheville (4.2%), Atlanta (4.2%), and Washington, DC (4.0%).

## North Carolina Overnight Visitor Profile

### Main Purpose of Visit

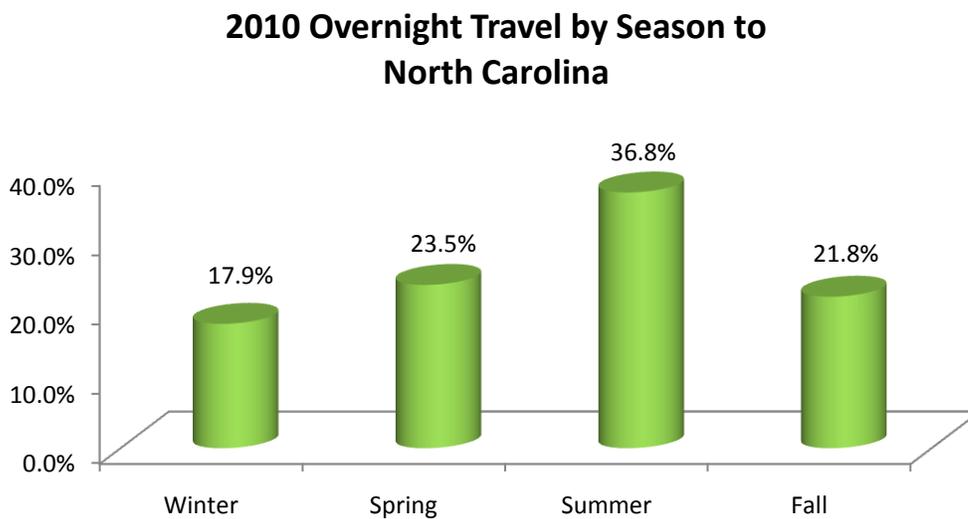
In 2010, almost nine out of ten (82.5%) of domestic overnight visitors came to North Carolina for leisure purposes, which included visiting friends and relatives, outdoor recreation and entertainment/sightseeing. Twelve percent (11.9%) of domestic overnight visitors came for general business, convention, seminar or other group meeting, while six (5.5%) percent traveled to the state to conduct personal or “other” business.

**2010 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 thirty-seven percent was the most popular season of the year for overnight travel to North Carolina. The spring (March through May) with nearly twenty-four percent and fall (September through November) with twenty-two percent followed. The winter season (December through February) accounted for just eighteen percent of overnight visitors to North Carolina.



## **Average Length of Stay**

In 2010, an average of 3.3 nights was spent by overnight visitors to North Carolina.

## **Travel Party Size**

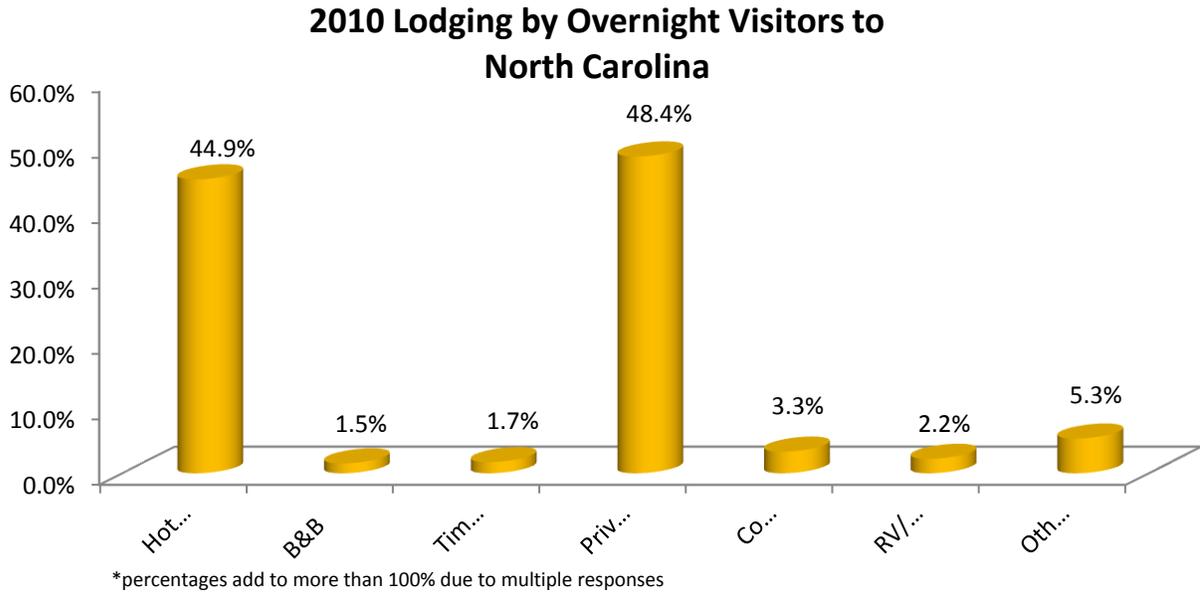
The average travel party size for all North Carolina overnight visitors was 2.1 people.

## **Children on Trip**

Twenty-nine percent of overnight visitor parties to North Carolina included children. Among those who traveled with children, the average number of children on trips was 1.9.

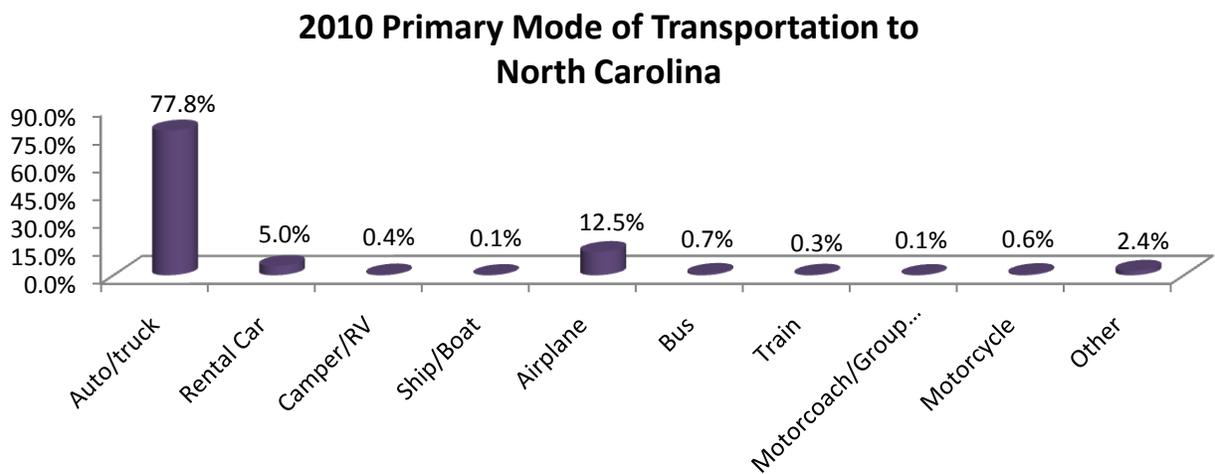
## Lodging Used in North Carolina

In 2010, nearly one-half of North Carolina visitors stayed in a private home (48.4%). Forty-five percent lodged at a hotel/motel and three percent stayed in a condo.



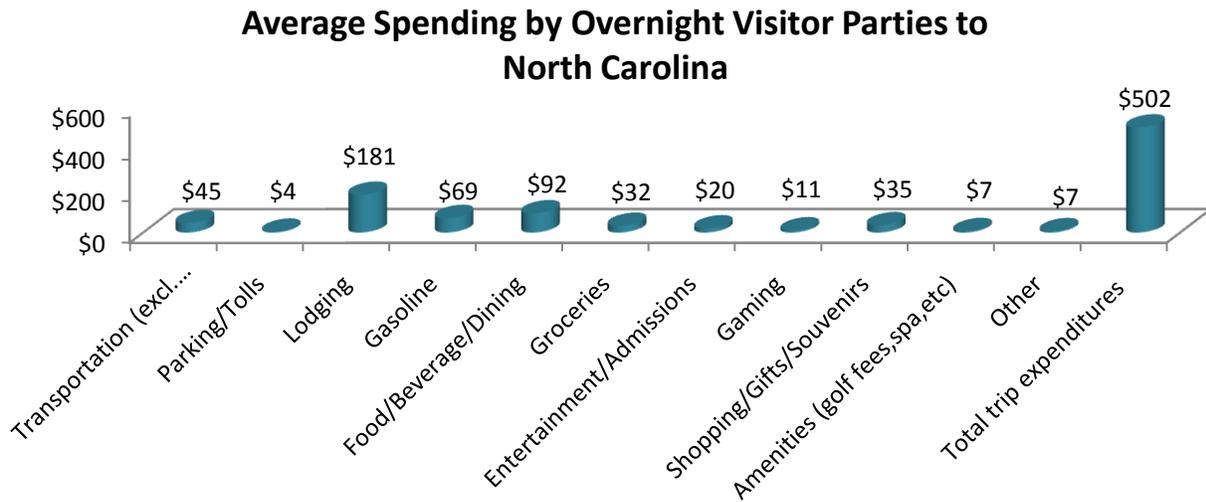
## Mode of Transportation

In 2010, the personal auto was by far the dominant form of transportation (83.2%) to the state, while over twelve percent traveled by air.



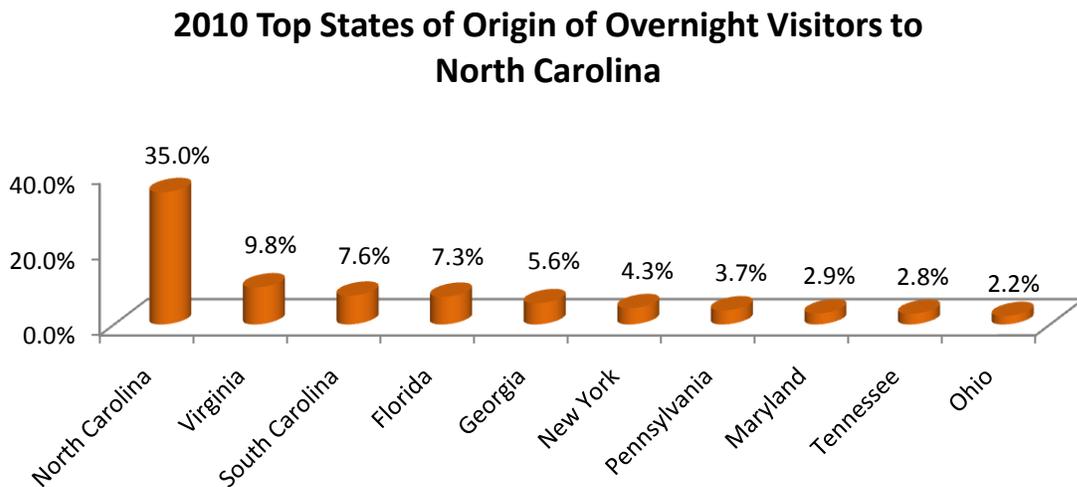
## Expenditures by North Carolina Visitors

The average overnight visitor party spending in the state was \$502.



## Origin of Visitors

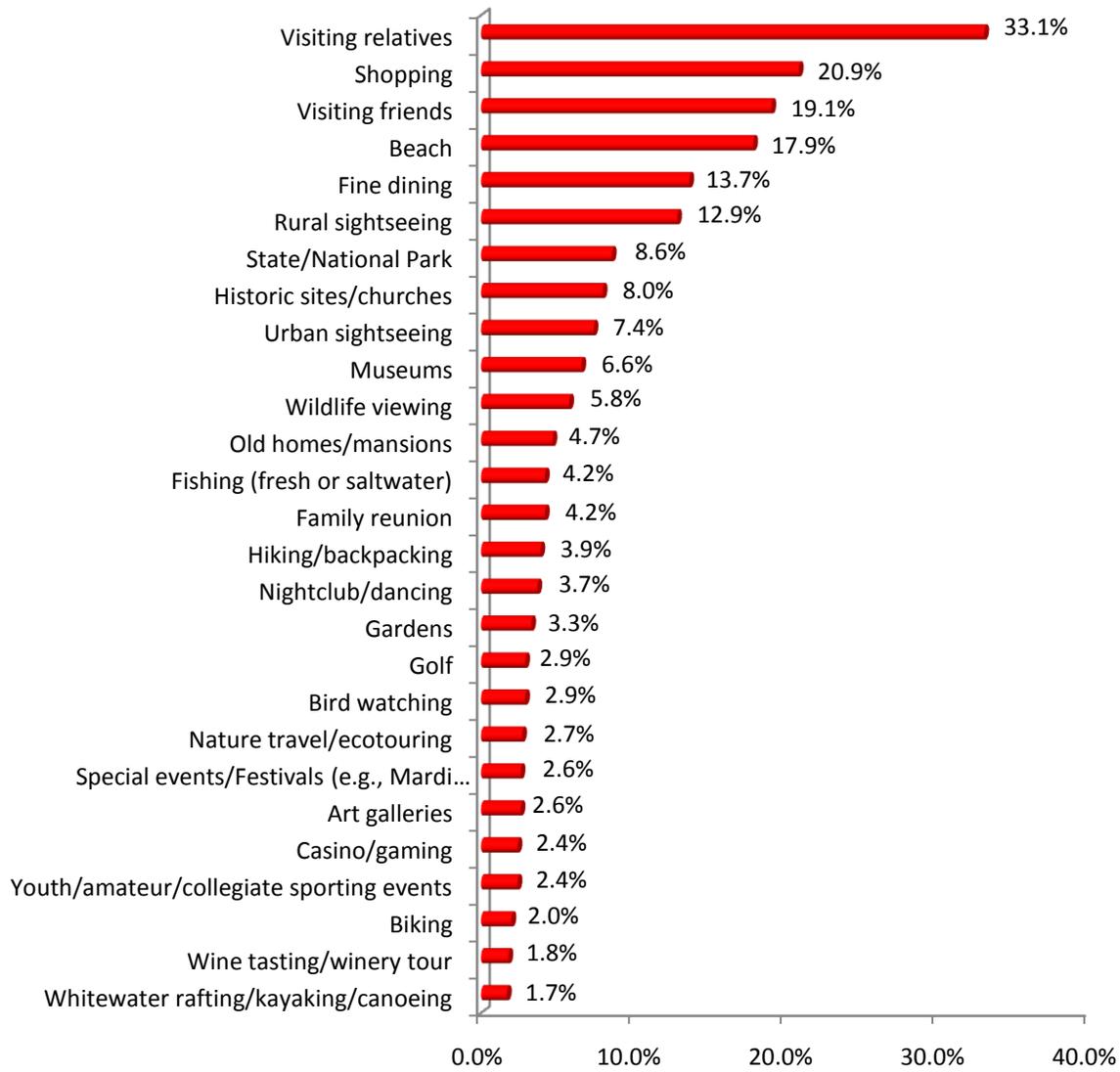
In 2010, the top states of origin for North Carolina overnight visitors included North Carolina (35.0%), Virginia (9.8%), South Carolina (7.6%), Florida (7.3%), Georgia (5.6%), and New York (4.3%).



## Activities

Over one-thirds (33.1%) of the overnight visitors to North Carolina visited relatives while traveling to the state. About one-fifth shopped (20.9%) and visited friends (19.1%) while visiting. Other popular activities included visiting a beach (17.9%), fine dining (13.7%), rural sightseeing (12.9%), visiting state/national parks (8.6%), and visiting historic sites/churches (8.0%).

**2010 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-one percent female and thirty-nine percent male. More than half (61.4%) of the visitors are married and just under one-fifth of the region's visitors are divorced, widowed or separated.

The largest proportion of North Carolina overnight visitors classify themselves as white (84.0%), and over eleven percent classify themselves as black/African American.

Over half (62.5%) of North Carolina overnight visitor parties have a household head with a college degree or higher. The average visitor is 47 years old, with over half (52.9%) being 45 years old or older.

Over forty percent (44.0%) of the visitor parties that traveled to North Carolina in 2010 had a household income \$75,000 or over. Twelve percent had a household income of over \$125,000.

## **2010 Top Advertising Markets**

In 2010, the top advertising markets sending overnight visitors to **North Carolina** were Raleigh-Durham-Fayetteville (13.1%), Charlotte (8.5%), Greensboro-Winston-Salem-High Point (5.9%), New York (4.6%), Atlanta (4.2%), Greenville-Spartanburg-Asheville (4.2%) and Washington DC (4.0%). Advertising markets correspond with Nielsen's Designated Market Areas (DMAs).

### **Top Advertising Markets of Origin for 2010 North Carolina *Overnight* Visitors**

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<b>DMA of Origin</b>	<b>Percentage of Total Overnight Visitors</b>
Raleigh-Durham (Fayetteville)	13.1%
Charlotte	8.5%
Greensboro-High Point-Winston Salem	5.9%
New York, NY	4.6%
Atlanta	4.2%
Greenville-Spartanburg-Asheville-Anderson	4.2%
Washington DC (Hagerstown, MD)	4.0%
Greenville-New Bern-Washington	3.8%
Norfolk-Portsmouth-Newport News	2.8%
Philadelphia, PA	2.6%
Orlando-Daytona Beach-Melbourne	2.0%
Tampa-St. Petersburg (Sarasota)	2.0%
Wilmington	2.0%
Richmond-Petersburg, VA	2.0%
Columbia, SC	1.8%
Roanoke-Lynchburg	1.8%

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

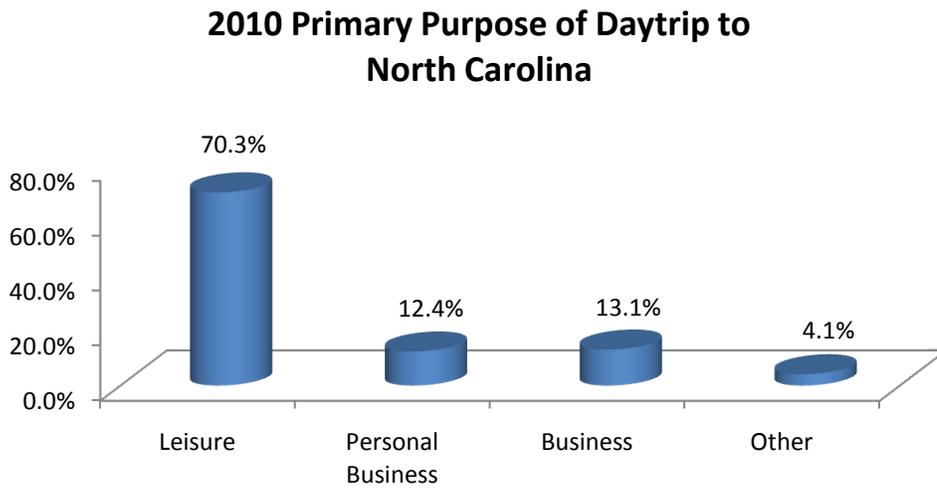
## 2010 North Carolina Daytrip Visitor Profile

### 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 2010, approximately 7.8 million daytrips were taken in North Carolina. North Carolina ranked #8 in the US in terms of daytrip visitation.
- ◆ Seventy percent of all daytrippers visited North Carolina for pleasure purposes, while thirteen percent of visitors came to conduct business (includes meeting/convention). Twelve percent of daytrippers indicated that “personal business” was the reason for visiting the state. The remaining four percent indicated an “other” reason for visiting the state.
- ◆ The summer (June - August) was the most popular season for day travel to North Carolina, with thirty-three percent of all 2010 daytrippers, followed by the spring (March-May) with twenty-six percent. Fall (September - November) and winter (December-February) accounted for twenty-three and nineteen percent of annual daytrippers to the state. June was the single largest month for day travel to the state with nearly fourteen percent.
- ◆ The average travel party size for daytrip visitor parties to North Carolina was 1.9 people. Twenty-six 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 2010, the average household trip expenditure for daytrip parties to the state was approximately \$187 per visit.
- ◆ The top states of origin of *daytrippers* to North Carolina were in-state residents (60.4%), and the neighboring states of South Carolina (15.5%), Virginia (7.4%), Georgia (3.7%), and Tennessee (2.5%).
- ◆ Forty-eight percent of the households that traveled to North Carolina on a daytrip in 2010 had a household income over \$50,000.
- ◆ In 2010, Raleigh/Durham/Fayetteville (20.3%) was the top advertising market of origin for *daytrippers* to the state, followed by Charlotte (17.5%), Greensboro/High Point/Winston Salem (14.8%), Greenville-Spartanburg-Asheville (11.4%), and Greenville-New Bern-Washington (9.9%).

## Main Purpose of Visit

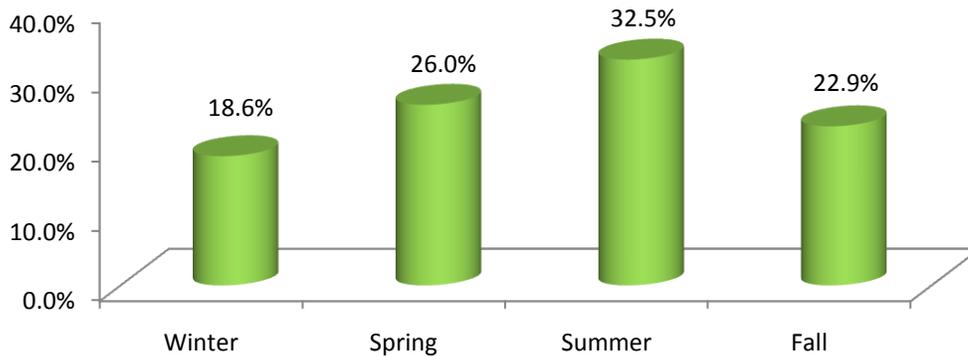
In 2010, seventy percent (70.3%) of daytrippers visited North Carolina for leisure purposes, which included visiting friends and relatives, outdoor recreation and entertainment/sightseeing. Twelve percent of daytrippers traveled to or within the state for personal business and thirteen percent of daytrippers came for general business, convention, seminar or other group meeting.



## Travel Volume by Season

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

**2010 Daytrip Travel by Season to North Carolina**



## Travel Party Size

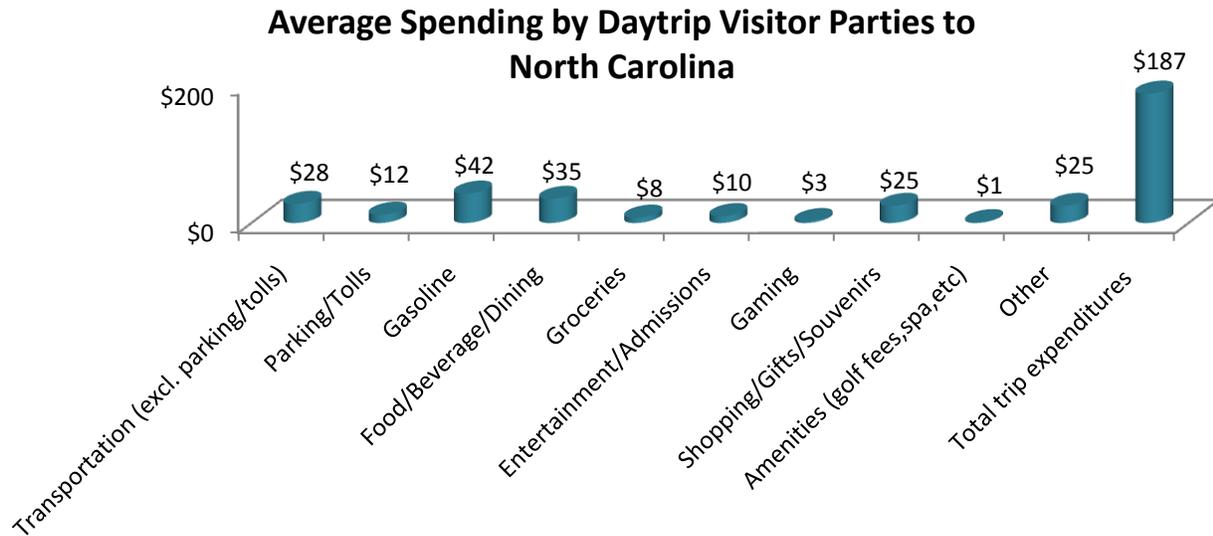
The average travel party size for all North Carolina daytrippers was 1.9 people.

## Children on Trip

Twenty-six percent of daytrip parties to North Carolina included children. Among those who traveled with children, the average number of children on trips was 1.7.

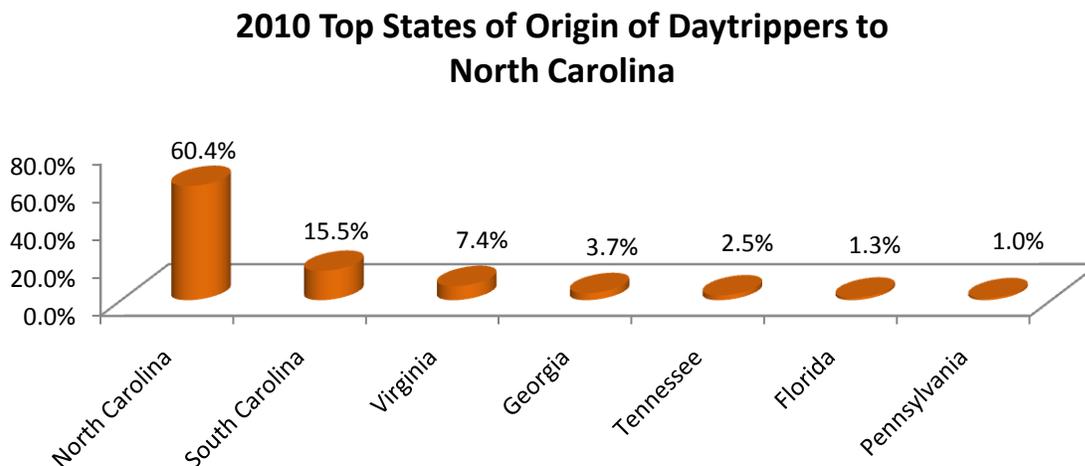
## Expenditures by North Carolina Daytrippers

The average overnight visitor party spending in the state was \$187.



## Origin of Visitors

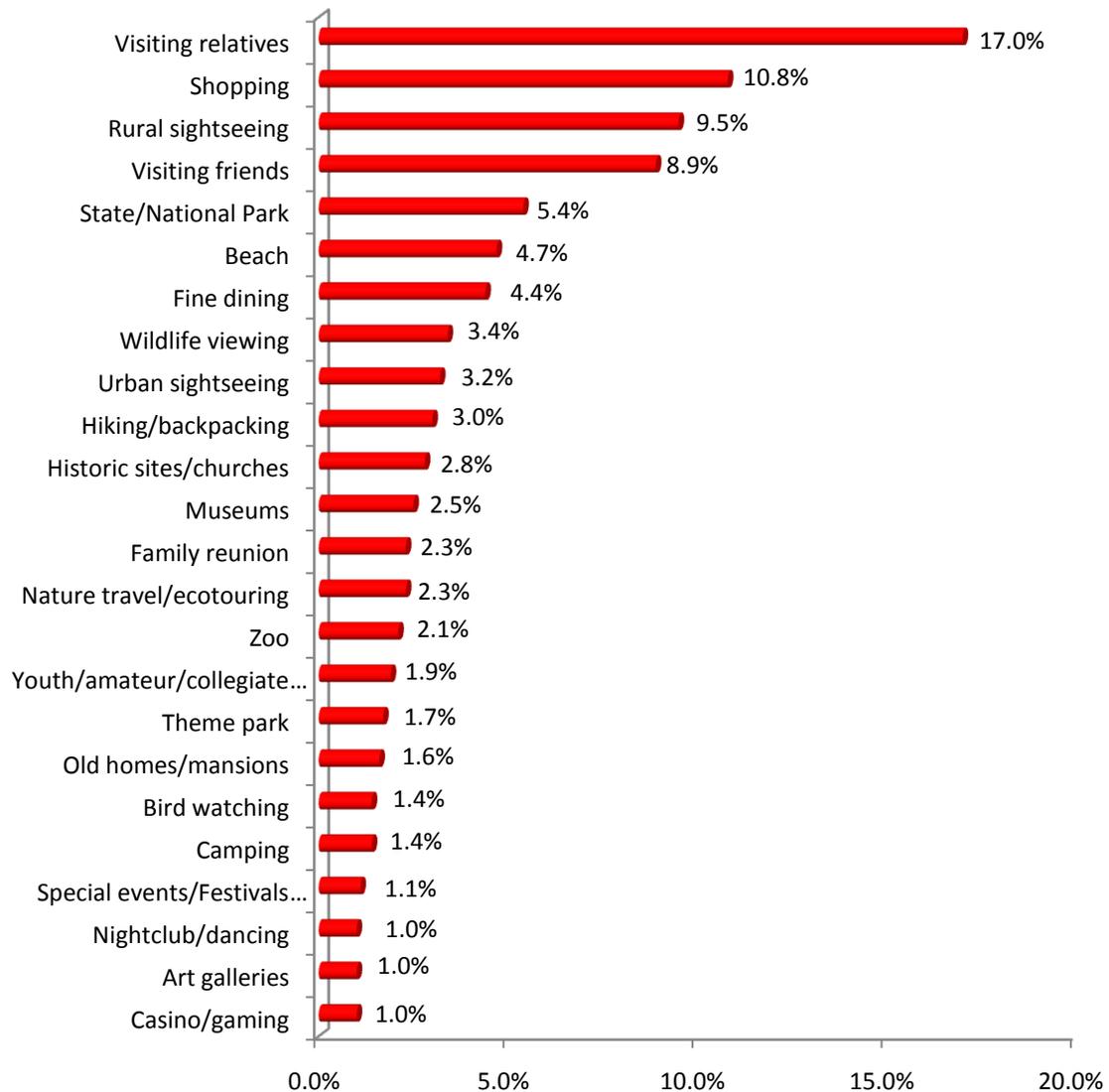
Not surprisingly, the top states of origin for North Carolina daytrippers were in-state residents and those from states contiguous to the state; North Carolina (60.4%), South Carolina (15.5%), Virginia (7.4%), Georgia (3.7%), and Tennessee (2.5%).



## Activities

Nearly twenty percent (17.0%) of the daytrippers to North Carolina visited relatives while on a daytrip in the state. Eleven percent shopped and nine percent visited friends.

**2010 Activities Participated in by Daytrippers to North Carolina**



## **Demographic Profile of North Carolina Daytrip Visitors**

The North Carolina daytripper gender breakdown is sixty-four percent female and thirty-six percent male. More than half (56.8%) of the visitors are married and just under one-fourth of the region's visitors are divorced, widowed or separated.

The largest proportion of North Carolina overnight visitors classify themselves as white (80.4%), and over fourteen percent classify themselves as black/African American.

Over half (57.2%) 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 one-quarter (28.1%) of the daytrip visitor parties that traveled to North Carolina in 2010 had a household income \$75,000 or over. four percent had a household income of over \$125,000.

## **2010 Top Advertising Markets**

In 2010, the top advertising markets sending daytrippers to **North Carolina** were Raleigh-Durham-Fayetteville (20.3%), Charlotte (17.5%), Greensboro-Winston-Salem-High Point (14.8%), Greenville-Spartanburg-Asheville (11.4%), and Greenville-New Bern-Washington (9.9%). Advertising markets correspond with Nielsen's Designated Market Areas (DMAs).

### **Top Advertising Markets of Origin for 2010 North Carolina Daytrippers**

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<b>DMA of Origin</b>	<b>Percentage of Total Daytrip Visitors</b>
Raleigh-Durham (Fayetteville)	20.3%
Charlotte	17.5%
Greensboro-High Point-Winston Salem	14.8%
Greenville-Spartanburg-Asheville-Anderson	11.4%
Greenville-New Bern-Washington	9.9%
Norfolk-Portsmouth-Newport News	4.5%
Roanoke-Lynchburg	2.8%
Wilmington	2.7%
Myrtle Beach-Florence	2.6%
Tri-Cities, TN-VA	2.2%
Atlanta	1.8%
Richmond-Petersburg	1.1%

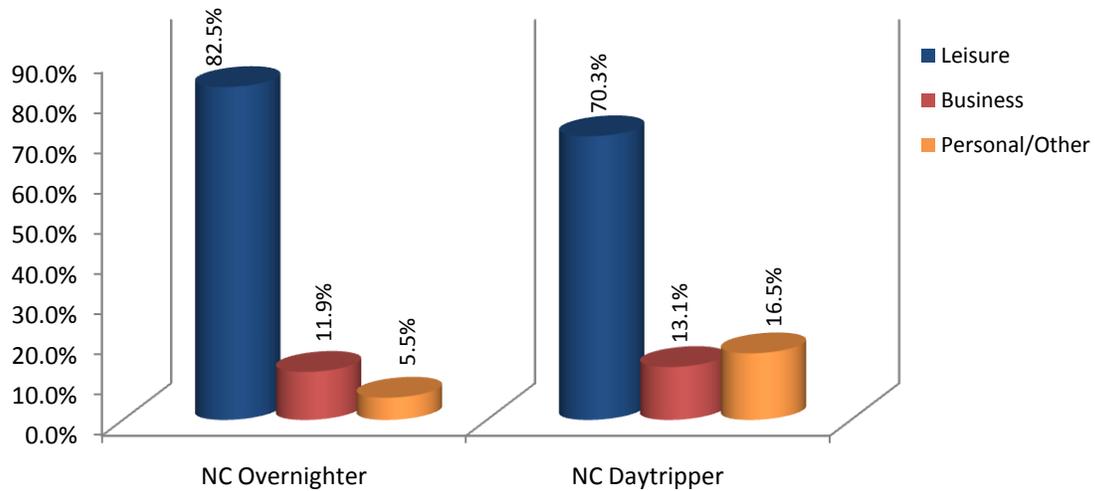
Note: Advertising markets defined by Nielsen's Designated Market Area (DMA)

## 2010 Overnight vs. Daytrip Comparison

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

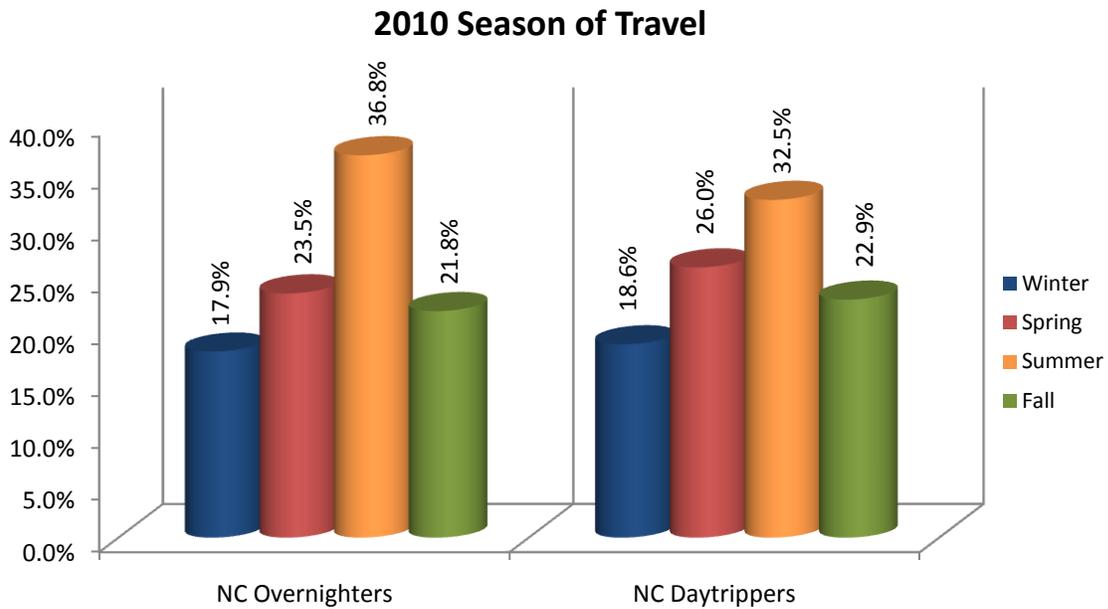
Though leisure is the predominant reason for travel to North Carolina for overnights and daytrippers, a slightly larger share of overnights to North Carolina travel to the state for leisure and than daytrippers. Daytrippers are more likely than overnights to visit the state for personal purposes.

### 2010 Primary Purpose of Trip



## Travel Volume by Season

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



## Travel Party Size

North Carolina Overnights	North Carolina Daytrippers
2.1 people	1.9 people

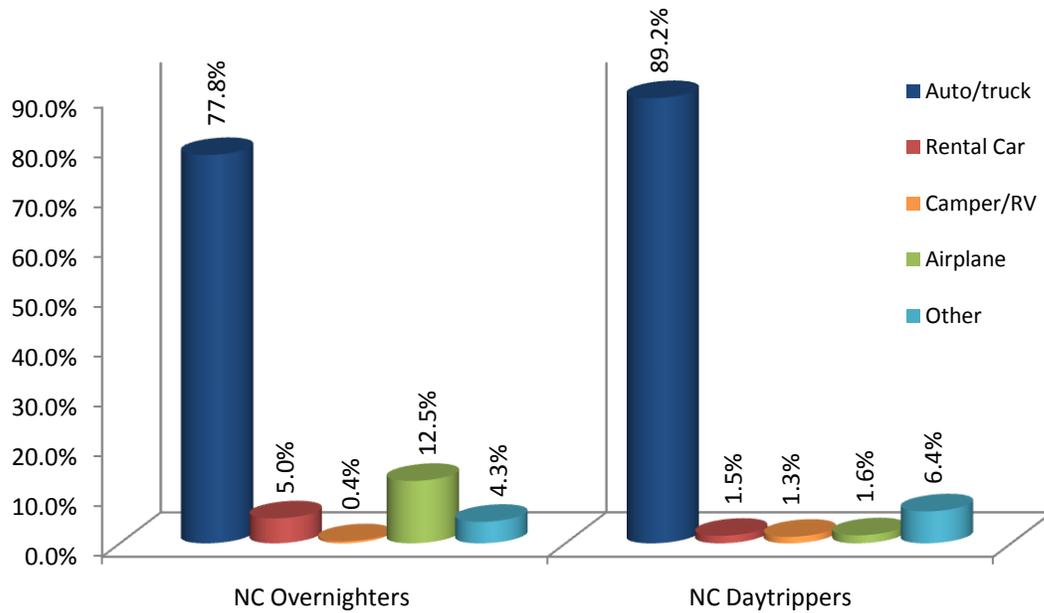
## Children on Trip

North Carolina Overnights	North Carolina Daytrippers
29.1%	25.5%

## Mode of Transportation

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

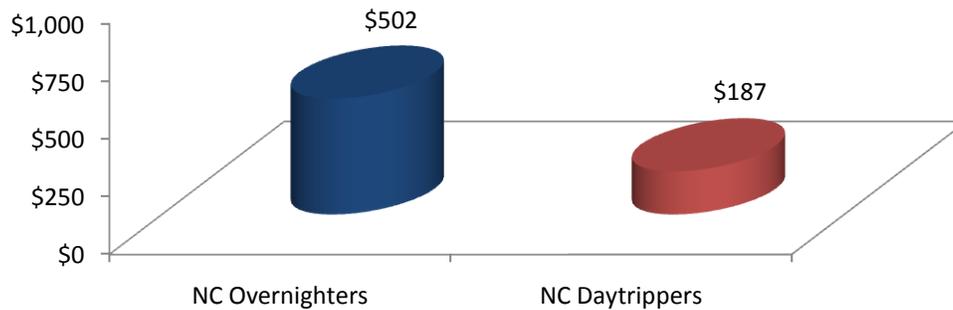
2010 Primary Transportation by Overnight Visitors



## Trip Expenditures

Overnighters to North Carolina spend about \$300 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 just over one-third of the state’s overnight visitors and nearly two-thirds of the state’s daytrippers.

NC Overnighters	NC Daytrippers
North Carolina (35.0%)	North Carolina (60.4%)
Virginia (9.8%)	South Carolina (15.5%)
South Carolina (7.6%)	Virginia (7.4%)
Florida (7.3%)	Georgia (3.7%)
Georgia (5.6%)	Tennessee (2.5%)
New York (4.3%)	Florida (1.3%)

## 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 Overnighers	NC Daytrippers
Visiting Relatives (33.1%)	Visiting Relatives (17.0%)
Shopping (20.9%)	Shopping (10.8%)
Visiting Friends (19.1%)	Rural Sightseeing (9.5%)
Beach (17.9%)	Visiting Friends (8.9%)
Fine Dining (13.7%)	State/National Park (5.4%)
Rural Sightseeing (12.9%)	Beach (4.7%)
State/National Park (8.6%)	Fine Dining (4.4%)
Historic Sites/Churches (8.0%)	Wildlife Viewing (3.4%)
Urban Sightseeing (7.4%)	Urban Sightseeing (3.2%)
Museums (6.6%)	Hiking/Backpacking (3.0%)
Wildlife Viewing (5.8%)	Historic Sites/Churches (2.8%)
Old Homes/Mansions (4.7%)	Museums (2.5%)
Family Reunion (4.2%)	Family Reunion (2.3%)
Fishing (4.2%)	Nature travel/Ecotouring (2.3%)
Hiking/Backpacking (3.9%)	Zoos (2.1%)
Nightclub/Dancing (3.7%)	Youth/amateur/collegiate sporting events (1.9%)
Gardens (3.3%)	Theme Park (1.7%)
Bird Watching (2.9%)	Old Homes/Mansions (1.6%)
Golf (2.9%)	Bird Watching (1.4%)
Nature travel/ecotouring (2.7%)	Camping (1.4%)
Special Events/Festivals (2.6%)	Special Events/Festivals (1.1%)
Art Galleries (2.6%)	Casino/Gaming (1.0%)
Youth/amateur/collegiate sporting events (2.4%)	Nightclub/Dancing (1.0%)
Casino/Gaming (2.4%)	Art Galleries (1.0%)
Biking (2.0%)	Fishing (0.9%)
Wine tasting/Winery tour (1.8%)	Biking (0.9%)
Whitewater rafting/Kayaking/Canoeing (1.7%)	Wine tasting/Winery tour (0.9%)

## Demographic Profile for North Carolina Visitors

	North Carolina Overnighters	North Carolina Daytrippers
<b>Average age of household head</b>	46.7 years of age	45.7 years of age
<b>Education of Household Head</b>		
High school or less	15.3%	15.7%
Some college - no degree	22.2%	27.1%
Completed college	42.3%	44.5%
Post Graduate College	20.2%	12.6%
<b>Annual Household Income</b>		
Less than \$25,000	11.5%	20.8%
\$25,000-\$49,999	24.9%	31.0%
\$50,000-\$74,999	19.7%	20.2%
\$75,000 & over	44.0%	28.1%
<b>Marital Status</b>		
Married	61.4%	56.8%
Never married	19.7%	19.7%
Divorced, widowed, separated	19.0%	23.4%
<b>Ethnicity</b>		
White	84.0%	80.4%
Black/African American	11.1%	14.2%
Asian or Pacific Islander	1.6%	1.5%
Other	3.3%	3.9%

## 2010 Top Advertising Markets

The top ten advertising markets for the overnights and daytrippers very similar, but differences can be noted in the ranks. Raleigh-Durham is the primary market for the overnights, and in 2010 also topped Charlotte as the top market for daytrippers.

NC Overnights	NC Daytrippers
Raleigh-Durham-Fayetteville (13.1%)	Raleigh-Durham-Fayetteville (20.3%)
Charlotte (8.5%)	Charlotte (17.5%)
Greensboro-High Point-Winston Salem (5.9%)	Greensboro-High Point-Winston Salem (14.8%)
New York (4.6%)	Greenville-Spartanburg-Asheville (11.4%)
Atlanta (4.2%)	Greenville-New Bern-Washington (9.9%)
Greenville-Spartanburg-Asheville (4.2%)	Norfolk-Portsmouth-Newport News (4.5%)
Washington, DC (Hagerstown, MD) (4.0%)	Columbia (3.2%)
Greenville-New Bern-Washington (3.8%)	Roanoke-Lynchburg (2.8%)
Norfolk-Portsmouth-Newport News (2.8%)	Wilmington (2.7%)
Philadelphia (2.6%)	Myrtle Beach-Florence (2.6%)
Orlando-Daytona Beach-Melbourne (2.0%)	Tri-Cities, TN-VA (2.2%)
Tampa-St. Petersburg-Sarasota (2.0%)	Atlanta (1.8%)
Wilmington (2.0%)	Richmond-Petersburg (1.1%)
Richmond-Petersburg (2.0%)	Washington, DC (Hagerstown, MD) (0.8%)

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

## 2010 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.