



# **2011 North Carolina Visitor Profile**

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

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## **2011 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.

# 2011 North Carolina Visitor Profile

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## 2011 North Carolina Visitor Profile

### Summary

- ◆ In 2011, approximately 37.2 million person-trips were taken in North Carolina. North Carolina ranked #7 in the US in terms of domestic visitation, and #6 in terms of overnight visitation.
- ◆ Eighty percent of all domestic visitors came to North Carolina for pleasure purposes, while eleven 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-two percent of domestic visitors came to North Carolina for pleasure purposes, while eleven percent traveled for business purposes. Four percent visited the state for personal business.
- ◆ The summer (June - August) was the most popular season for travel to North Carolina, with thirty-five percent of all 2011 visitors. Fall (September - November) and spring (March-May) followed with twenty-five percent and twenty-three percent, respectively. The winter season (December-February) was the least visited with eighteen percent. August was the single largest month for travel to the state with over twelve (12.2%) percent.
- ◆ Forty-nine percent of North Carolina visitors stayed in a private home while forty-two 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 2.1. Twenty-eight percent of travel parties to the state included children in the party.
- ◆ Eighty-two percent of all travelers to the state drove (includes personal automobile, rental, motorcycle and RV), while nine percent traveled by air.
- ◆ In 2011, the average household trip expenditure by visitors to North Carolina was \$454. The average household trip expenditure for overnight visitors was \$576. Daytrip parties to the state spent approximately \$155 per visit.
- ◆ The top states of origin of *total* visitors to North Carolina were in-state residents (45.9%), Virginia (7.5%), South Carolina (7.2%), Georgia (5.6%), Florida (5.0%), and Tennessee (3.6%).
- ◆ Sixty percent of the households that traveled to North Carolina in 2011 had a household income over \$50,000.
- ◆ In 2011, Raleigh/Durham/Fayetteville (14.1%) was the top advertising market of origin for *all* travelers to the state, followed by Charlotte (12.0%), Greensboro/High Point/Winston Salem (7.8%), Greenville-New Bern-Washington (5.2%), Greenville-Spartanburg-Asheville (5.1%), Atlanta (4.8%), New York (3.5%) Washington, DC (2.8%), and Norfolk-Portsmouth-Newport News (2.8%).

## 2011 North Carolina Overnight Visitor Profile

### Summary

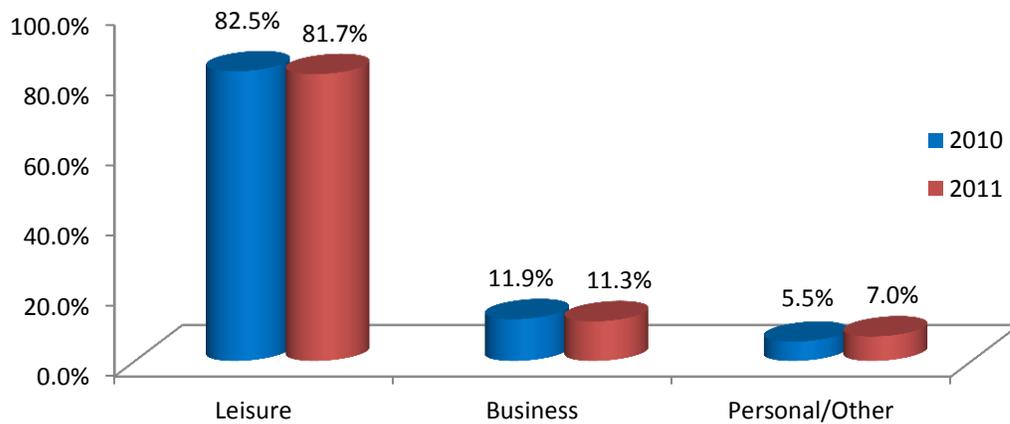
- ◆ In 2011, approximately 29.2 million overnight person-trips were taken in North Carolina. North Carolina ranked #6 in the US in terms of domestic overnight visitation.
- ◆ Eighty-two percent of all domestic overnight visitors came to North Carolina for pleasure purposes, while eleven percent of visitors came to conduct business (includes meeting/convention). The remaining seven 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 2011 overnight visitors. Fall (September - November) and spring (March-May) and followed with twenty-six percent and twenty-two percent, respectively. The winter season (December-February) was the least visited with sixteen percent. August was the single largest month for travel to the state with over twelve (12.5%) percent.
- ◆ Overnight visitors to North Carolina spent an average of 3.5 nights in the state in 2011.
- ◆ Forty-nine percent of North Carolina visitors stayed in a private home while forty-two 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 2.0 people. Twenty-eight percent of overnight travel parties to the state included children in the party.
- ◆ Eighty-five percent of overnight travelers to the state drove (includes personal automobile, rental, motorcycle and RV), while over eleven percent (11.1%) traveled by air.
- ◆ In 2011, the average household trip expenditure for overnight visitors was \$576. Daytrip parties to the state spent approximately \$155 per visit.
- ◆ The top states of origin of *overnight* visitors to North Carolina were in-state residents (36.8%), Virginia (8.7%), Georgia (6.7%), Florida (6.2%), South Carolina (6.1%), and Tennessee (4.1%). The proportion of overnight visitors from Tennessee increased from 2.8% in 2010 to 4.1% in 2011.
- ◆ Sixty-four percent of the households that traveled overnight to North Carolina in 2011 had a household income over \$50,000, and a quarter (25%) of them had an income of over \$100,000.
- ◆ In 2011, Raleigh/Durham/Fayetteville (11.7%) was the top advertising market of origin for *overnight* travelers to the state, followed by Charlotte (9.5%), Greensboro/High Point/Winston Salem (6.8%), Atlanta (5.5%), New York (4.3%), Greenville-New Bern-Washington (4.0%) Greenville-Spartanburg-Asheville (3.7%) and Washington, DC (3.3%).

## North Carolina Overnight Visitor Profile

### Main Purpose of Visit

In 2011, almost nine out of ten (81.7%) of domestic overnight visitors came to North Carolina for leisure purposes, which included visiting friends and relatives, outdoor recreation and entertainment/sightseeing. Eleven percent (11.3%) of domestic overnight visitors came for general business, convention, seminar or other group meeting, while seven percent traveled to the state to conduct personal or “other” business.

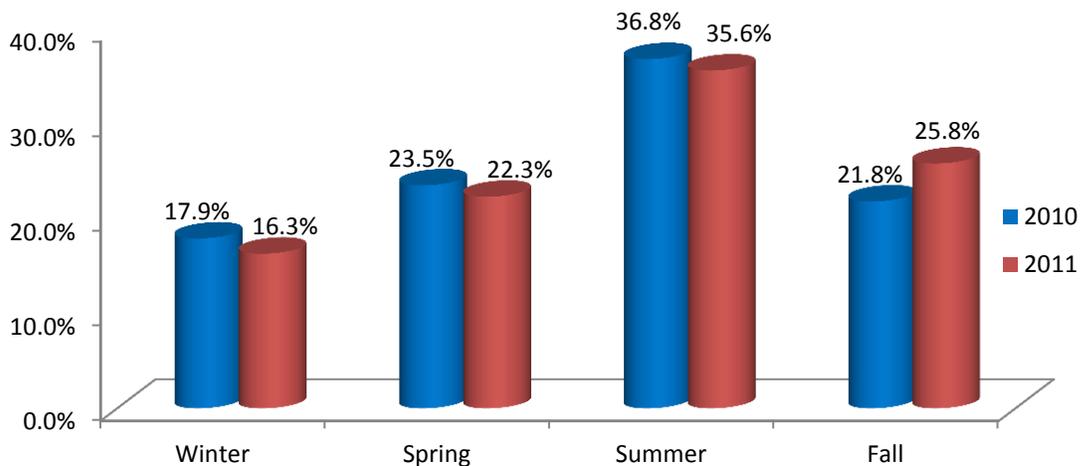
**Primary Purpose of Overnight Trip to North Carolina**



## Travel Volume by Season

When examining overnight visitation based on the typical seasonal schedule, the summer (June through August) with thirty-six percent was the most popular season of the year for overnight travel to North Carolina. The fall (September through November) with nearly twenty-six percent was the second most popular season for overnight travelers, up from 22% in 2010. Spring (March through May) and winter (December through February) followed, accounting for just with twenty-two percent and sixteen percent of overnight visitors to North Carolina respectively.

**Overnight Travel by Season to North Carolina**



## Average Length of Stay

In 2011, an average of 3.5 nights was spent by overnight visitors to North Carolina, up from 3.3 nights in 2010.

## Travel Party Size

The average travel party size for all North Carolina overnight visitors was 2.0 people, down slightly from 2.1 persons in 2010.

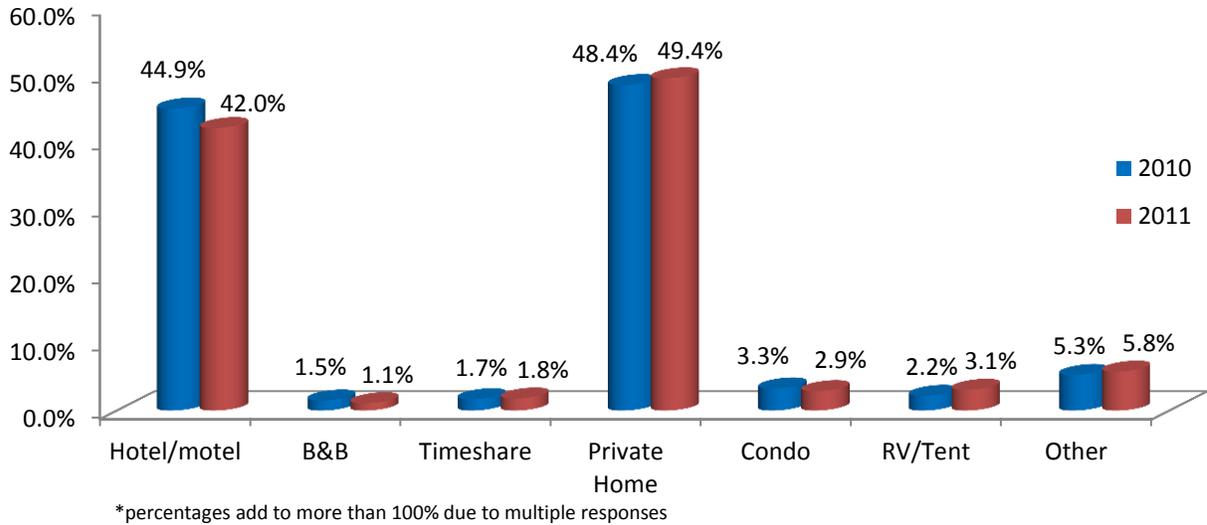
## Children on Trip

Twenty-eight 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 2011, nearly one-half of North Carolina visitors stayed in a private home (49.4%). Forty-two percent lodged at a hotel/motel and three percent stayed in a condo.

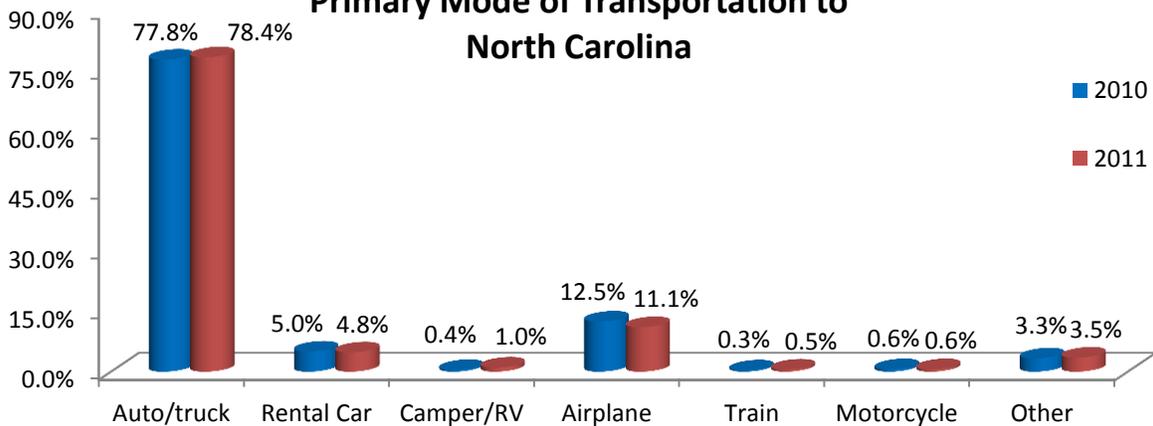
**Lodging by Overnight Visitors to North Carolina**



## Mode of Transportation

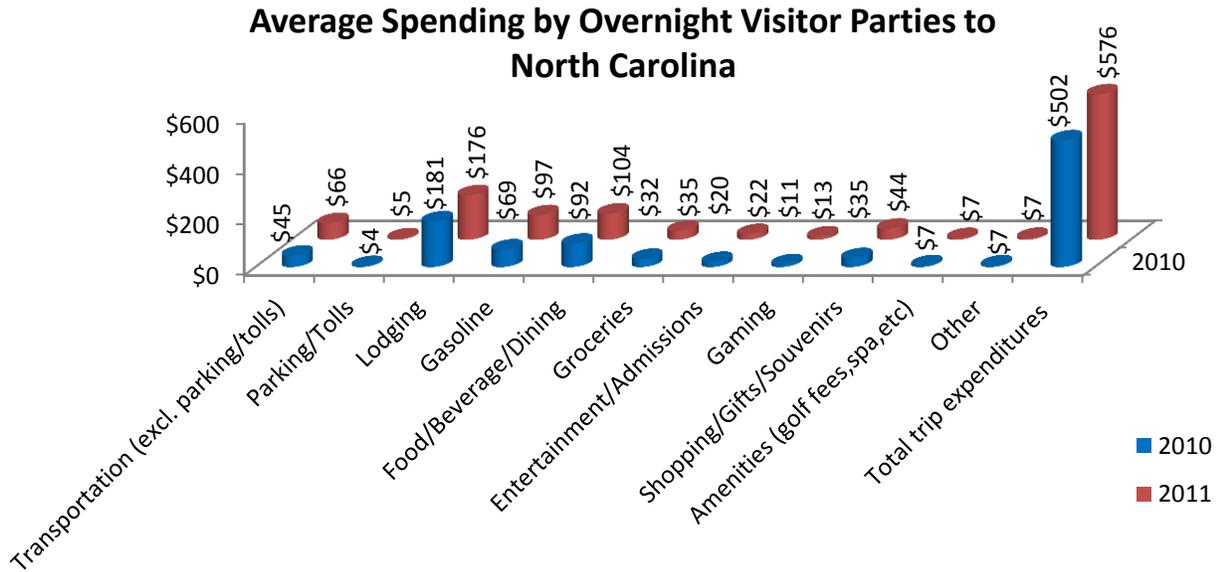
In 2011, the personal auto was by far the dominant form of transportation (78.4%) to the state, while just over eleven percent traveled by air.

**Primary Mode of Transportation to North Carolina**



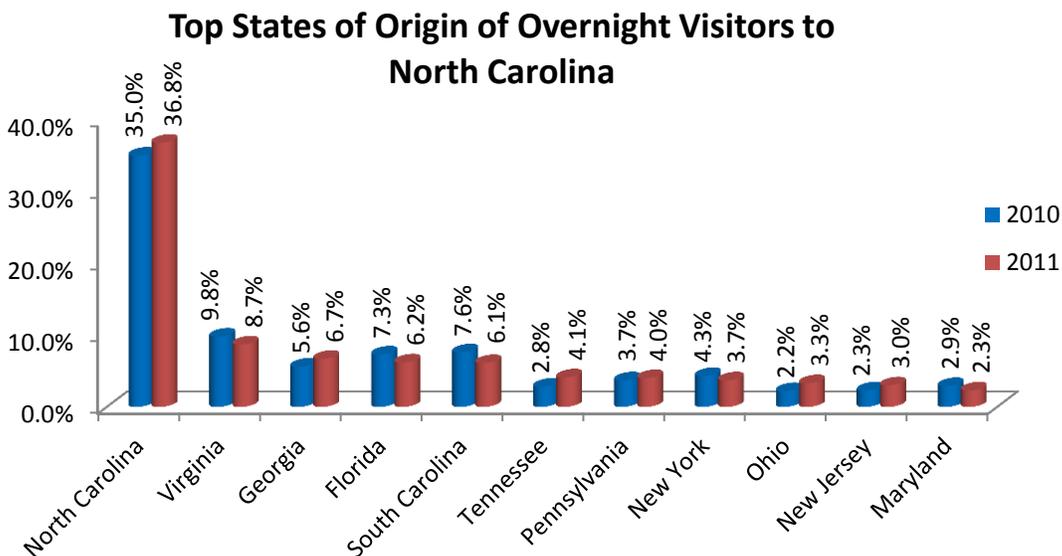
## Expenditures by North Carolina Visitors

The average overnight visitor party spending in the state was \$576, up 13% from 2010.



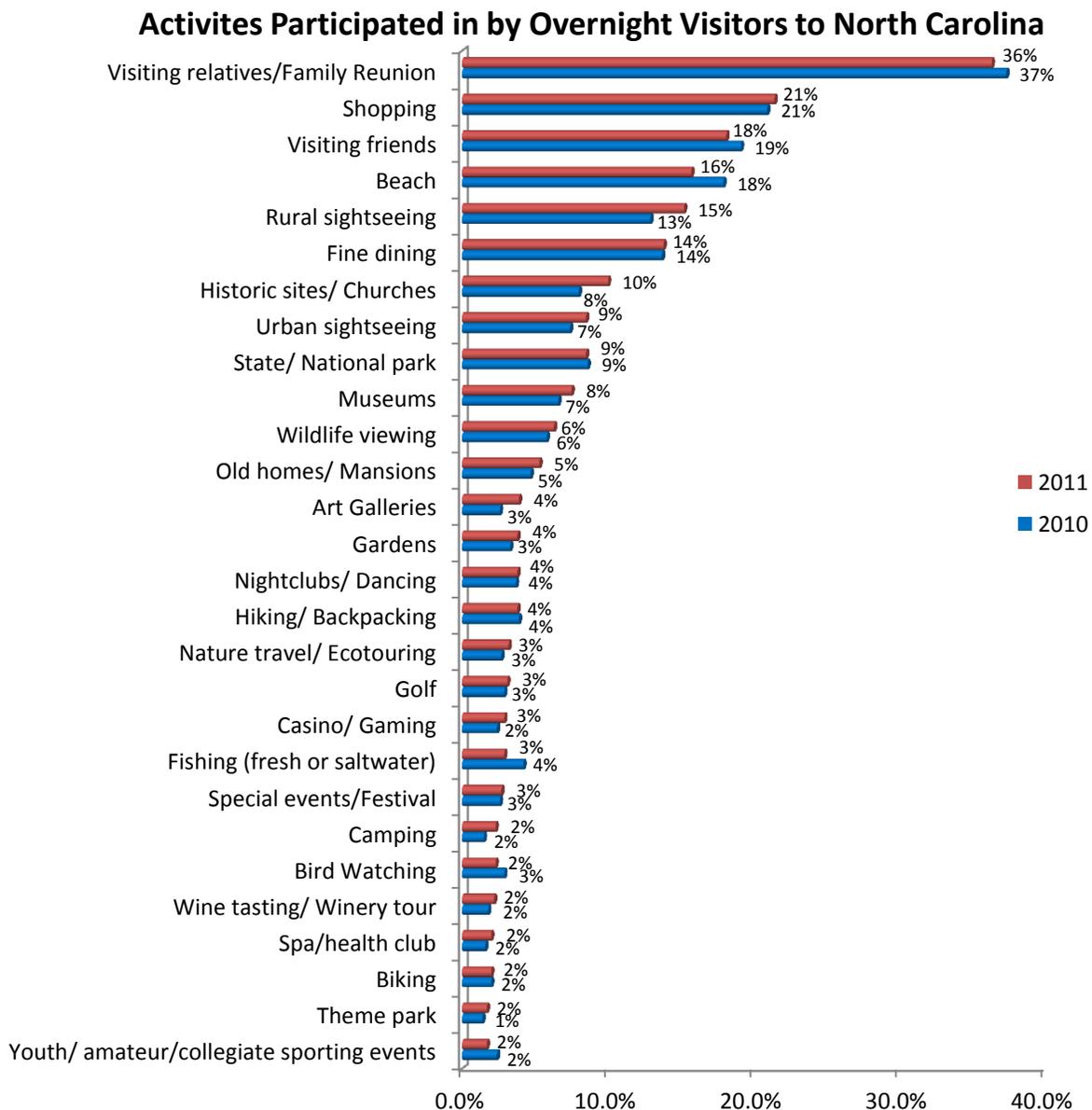
## Origin of Visitors

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-third (36%) of 2011 overnight visitors to North Carolina visited relatives or participate in a family reunion while traveling to the state. About one-fifth shopped (21%) and visited friends (18%) while visiting. Other popular activities included visiting a beach (16%), rural sightseeing (15%), fine dining (14%), visiting historic sites/churches (10.0%) and urban sightseeing (9%). **\*Note that responses to this question are not mutually exclusive and percentages do not equal 100%. Therefore, proportions should not be aggregated to combine categories of activities. Also note that these activities do not imply purpose of trip.**



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

The North Carolina overnight visitor gender breakdown is sixty-two percent female and thirty-eight percent male. More than half (61.5%) 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 (83.2%), and nearly eleven percent classify themselves as black/African American.

Over half (60.7%) 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 (50.6%) being 45 years old or older.

Over forty percent (42.4%) of the visitor parties that traveled to North Carolina in 2011 had a household income \$75,000 or over. Twelve percent had a household income of over \$125,000.

## **2011 Top Advertising Markets**

In 2011, the top advertising markets sending overnight visitors to **North Carolina** were Raleigh-Durham-Fayetteville (11.7%), Charlotte (9.5%), Greensboro-Winston-Salem-High Point (6.8%), Atlanta (5.5%), New York (4.3%), Greenville-New Bern-Washington (4.0%), Greenville-Spartanburg-Asheville (3.7%) and Washington DC (3.3%). Advertising markets correspond with Nielsen's Designated Market Areas (DMAs).

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### **Top Advertising Markets of Origin for 2011 North Carolina Overnight Visitors**

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<b>DMA of Origin</b>	<b>2010 Percentage of Total Overnight Visitors</b>	<b>2011 Percentage of Total Overnight Visitors</b>
Raleigh-Durham (Fayetteville)	13.1%	11.7%
Charlotte	8.5%	9.5%
Greensboro-High Point-Winston Salem	5.9%	6.8%
Atlanta	4.2%	5.5%
New York, NY	4.6%	4.3%
Greenville-New Bern-Washington	3.8%	4.0%
Greenville-Spartanburg-Asheville-Anderson	4.2%	3.7%
Washington DC (Hagerstown, MD)	4.0%	3.3%
Norfolk-Portsmouth-Newport News	2.8%	2.7%
Knoxville	1.2%	2.7%
Tampa-St. Petersburg (Sarasota)	2.0%	2.0%
Philadelphia, PA	2.6%	1.9%
Wilmington	2.0%	1.9%
Richmond-Petersburg, VA	2.0%	1.8%
Orlando-Daytona Beach-Melbourne	2.0%	1.6%
Columbia, SC	1.8%	1.6%
Roanoke-Lynchburg	1.8%	1.6%

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

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## 2011 North Carolina Daytrip Visitor Profile

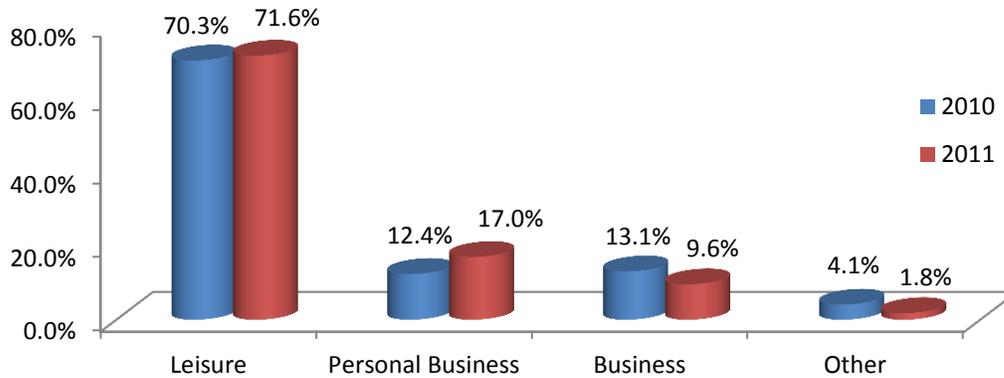
### Summary

- ◆ 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 2011, approximately 7.9 million daytrips were taken in North Carolina. North Carolina ranked #11 in the US in terms of daytrip visitation.
- ◆ Seventy-two percent of all daytrippers visited North Carolina for pleasure purposes, while ten percent of visitors came to conduct business (includes meeting/convention). Seventeen 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-four percent of all 2011 daytrippers, followed by the spring (March-May) with twenty-four percent. Winter (December-February) and fall (September - November) accounted for twenty-two and twenty percent of annual daytrippers to the state. July was the single largest month for day travel to the state with nearly twelve percent, followed closely by August with eleven percent.
- ◆ The average travel party size for daytrip visitor parties to North Carolina was 2.1 people, up from 1.9 in 2010. Thirty percent of travel parties to the state included children in the party.
- ◆ Ninety-six percent of daytrippers to the state drove (includes personal automobile, rental, motorcycle and RV).
- ◆ In 2011, the average household trip expenditure for daytrip parties to the state was approximately \$155 per visit, down from \$187 in 2010.
- ◆ The top states of origin of *daytrippers* to North Carolina were in-state residents (67.5%), and the neighboring states of South Carolina (10.0%), Virginia (4.8%), Georgia (3.0%), and Tennessee (2.7%).
- ◆ Fifty-one percent of the households that traveled to North Carolina on a daytrip in 2011 had a household income over \$50,000.
- ◆ In 2011, Raleigh/Durham/Fayetteville (22.7%) was the top advertising market of origin for *daytrippers* to the state, followed by Charlotte (22.1%), Greensboro/High Point/Winston Salem (11.2%), Greenville-Spartanburg-Asheville (10.4%), and Greenville-New Bern-Washington (9.7%).

## Main Purpose of Visit

In 2011, seventy percent (71.6%) of daytrippers visited North Carolina for leisure purposes, which included visiting friends and relatives, outdoor recreation and entertainment/sightseeing. Seventeen percent of daytrippers traveled to or within the state for personal business and twelve percent of daytrippers came for general business, convention, seminar or other group meeting.

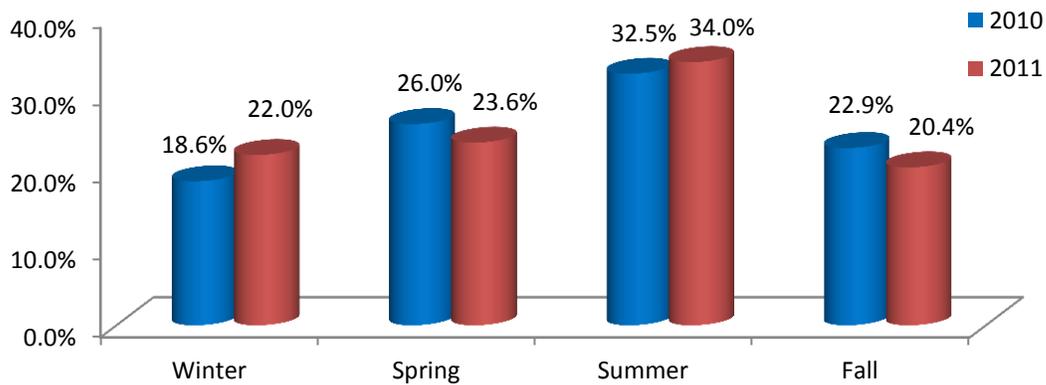
**Primary Purpose of Daytrip to North Carolina**



## 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-four percent and twenty-four percent of daytrippers respectively. The fall (September through November) and winter (December through February) had twenty and twenty-two percent of the annual North Carolina daytrippers.

### Daytrip Travel by Season to North Carolina



## Travel Party Size

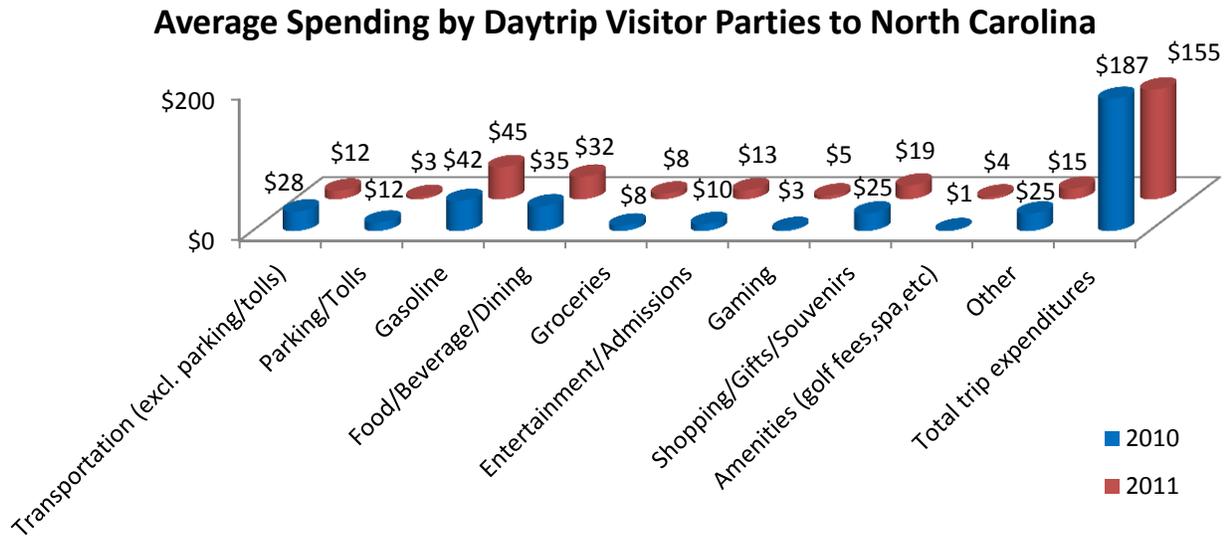
The average travel party size for all North Carolina daytrippers was 2.1 people, up from 1.9 in 2010.

## 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 1.9.

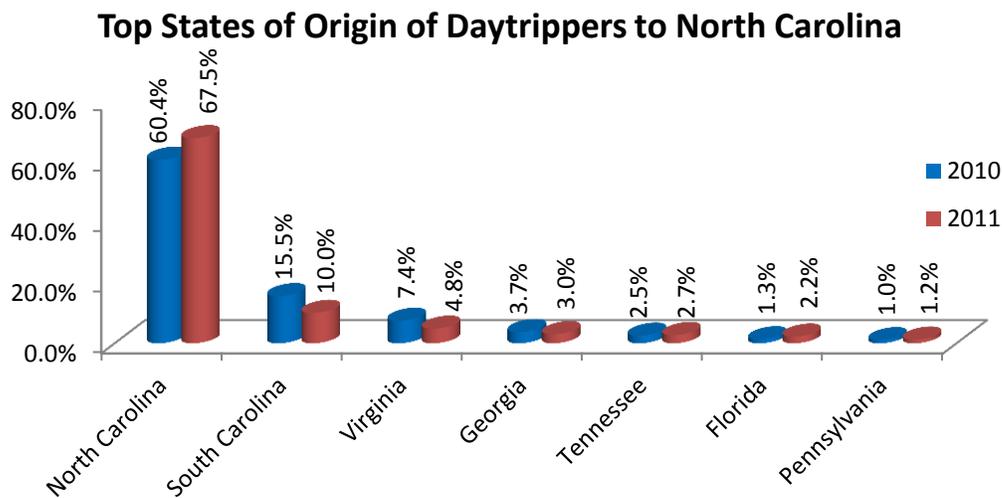
## Expenditures by North Carolina Daytrippers

The average overnight visitor party spending in the state was \$155, down from \$187 in 2010.



## Origin of Visitors

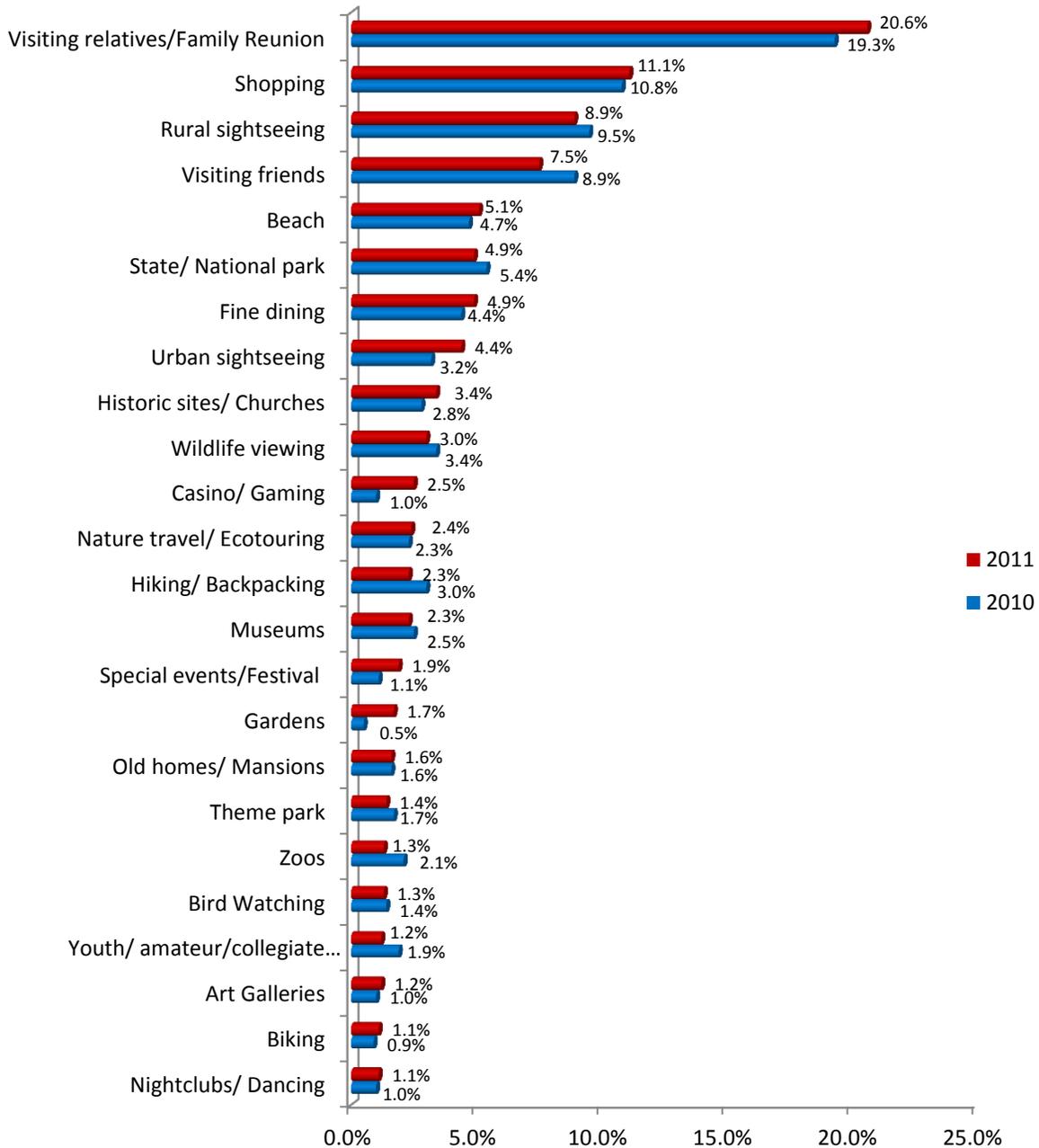
Not surprisingly, the top states of origin for North Carolina daytrippers were in-state residents and those from states contiguous to the state; North Carolina (67.5%), South Carolina (10.0%), Virginia (4.8%), Georgia (3.0%), and Tennessee (2.7%).



## Activities

Over twenty percent (17.0%) of the daytrippers to North Carolina visited relatives or participated in a family reunion while on a daytrip in the state. Eleven percent shopped and eight percent visited friends.

### Activities Participated in by Daytrippers to North Carolina



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

The North Carolina daytripper gender breakdown is sixty-five percent female and thirty-five percent male. More than half (59.3%) 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 daytrippers classify themselves as white (82.5%), and over twelve percent classify themselves as black/African American.

Nearly half (49.7%) of North Carolina daytrippers have a household head with a college degree or higher. The average visitor is 47 years old, with over half (57.0%) being 45 years old or older.

Over one-quarter (27.2%) of the daytrip visitor parties that traveled to North Carolina in 2011 had a household income \$75,000 or over. Four percent had a household income of over \$125,000.

## 2011 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 North Carolina *Daytrippers*

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DMA of Origin	2010 Percentage of Total Overnight Visitors	2011 Percentage of Total Overnight Visitors
Raleigh-Durham (Fayetteville)	20.3%	22.7%
Charlotte	17.5%	21.1%
Greensboro-High Point-Winston Salem	14.8%	11.2%
Greenville-Spartanburg-Asheville-Anderson	11.4%	10.4%
Greenville-New Bern-Washington	9.9%	9.7%
Wilmington	2.7%	5.0%
Norfolk-Portsmouth-Newport News	4.5%	3.5%
Columbia	3.2%	2.8%
Atlanta	1.8%	2.5%
Roanoke-Lynchburg	2.8%	2.0%
Myrtle Beach-Florence	2.6%	1.6%
Tri-Cities, TN-VA	2.2%	1.0%

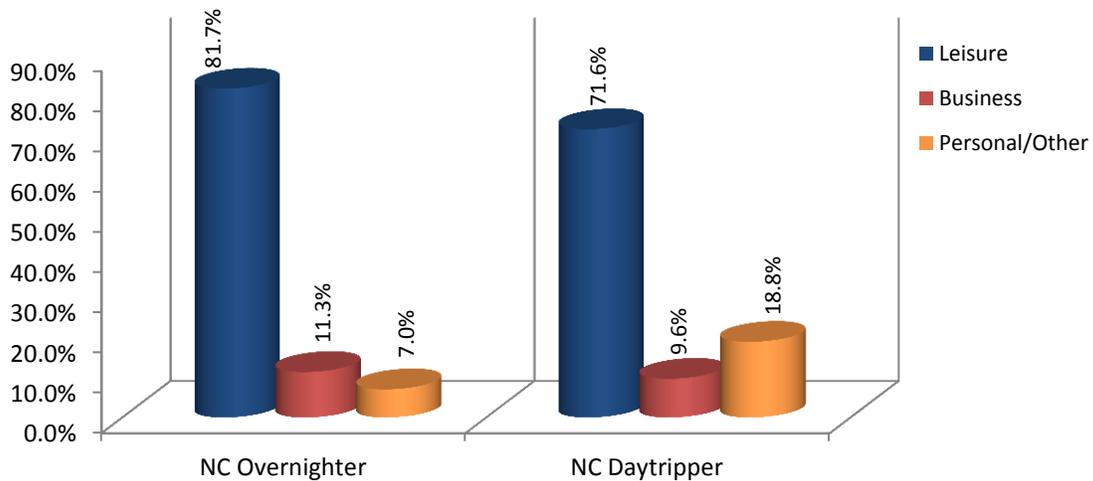
Note: Advertising markets defined by Nielsen's Designated Market Area (DMA)

## 2011 Overnight vs. Daytrip Comparison

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

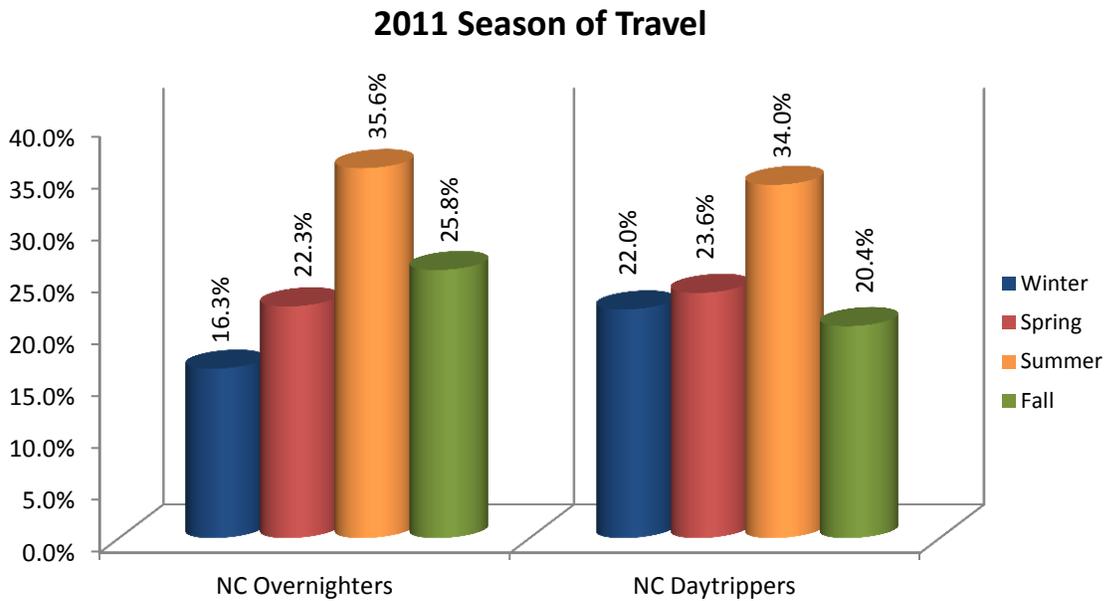
Though leisure is the predominant reason for travel to North Carolina for overnighters and daytrippers, a slightly larger share of overnighters to North Carolina travel to the state for leisure than daytrippers. Daytrippers are more likely than overnighters to visit the state for personal business or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

### 2011 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 both more likely to visit during the summer, the other months are more evenly distributed for daytrippers to the state than overnights.



## Travel Party Size

North Carolina Overnights	North Carolina Daytrippers
2.0 people	2.1 people

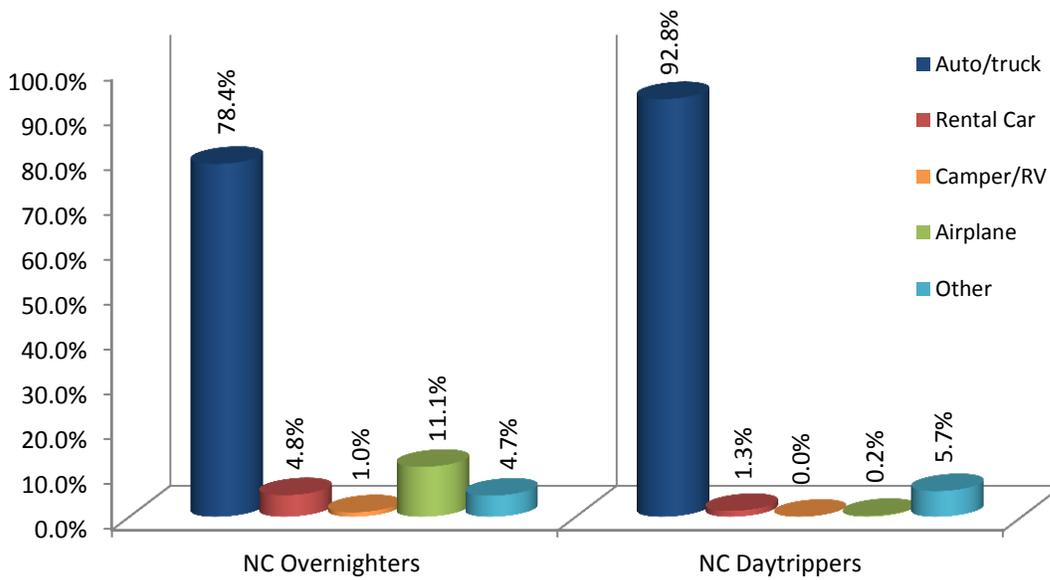
## Children on Trip

North Carolina Overnights	North Carolina Daytrippers
27.5%	29.7%

## Mode of Transportation

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

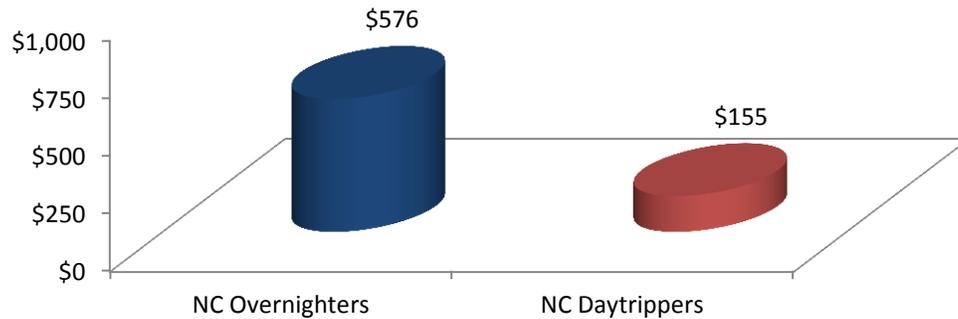
### 2011 Primary Transportation by Overnight Visitors



## Trip Expenditures

2011 overnighters to North Carolina spend over \$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 just over one-third of the state's overnight visitors and daytrippers.

NC Overnighters	NC Daytrippers
North Carolina (36.8%)	North Carolina (67.5%)
Virginia (8.7%)	South Carolina (10.0%)
Georgia (6.7%)	Virginia (4.8%)
Florida (6.2%)	Georgia (3.0%)
South Carolina (6.1%)	Tennessee (2.7%)
Tennessee (4.1%)	Florida (2.2%)
Pennsylvania (4.0%)	New York (1.6%)
New York (3.7%)	Pennsylvania (1.2%)
Ohio (3.3%)	Ohio (1.0%)
New Jersey (3.0%)	Maryland (0.9%)

## 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 (33.0%)	Visiting Relatives (18.6%)
Shopping (21.4%)	Shopping (11.1%)
Visiting Friends (18.1%)	Rural Sightseeing (8.9%)
Beach (15.7%)	Visiting Friends (7.5%)
Rural Sightseeing (15.2%)	Beach (5.1%)
Fine Dining (13.8%)	Fine Dining (4.9%)
Historic Sites/Churches (10.0%)	State/National Park (4.9%)
State/National Park (8.5%)	Urban Sightseeing (4.4%)
Urban Sightseeing (8.5%)	Historic Sites/Churches (3.4%)
Museums (7.5%)	Wildlife Viewing (3.0%)
Wildlife Viewing (6.3%)	Casino/Gaming (2.5%)
Old Homes/Mansions (5.3%)	Nature travel/Ecotouring (2.4%)
Art Galleries (3.9%)	Museums (2.3%)
Hiking/Backpacking (3.8%)	Hiking/Backpacking (2.3%)
Nightclub/Dancing (3.8%)	Family Reunion (2.0%)
Gardens (3.8%)	Special Events/Festivals (1.9%)
Family Reunion (3.3%)	Gardens (1.7%)
Nature travel/ecotouring (3.2%)	Old Homes/Mansions (1.6%)
Golf (3.1%)	Theme Park (1.4%)
Fishing (2.9%)	Bird Watching (1.3%)
Casino/Gaming (2.9%)	Zoos (1.3%)
Special Events/Festivals (2.7%)	Art Galleries (1.2%)
Bird Watching (2.3%)	Youth/amateur/collegiate sporting events (1.2%)
Wine tasting/Winery tour (2.2%)	Nightclub/Dancing (1.1%)
Biking (2.0%)	Biking (1.1%)
Spa/Health Club (2.0%)	Golf (0.9%)
Youth/amateur/collegiate sporting events (1.7%)	Musical Theater (0.9%)
Theme Park (1.7%)	Major Sports Event (0.9%)

## Demographic Profile for North Carolina Visitors

	North Carolina Overnighters	North Carolina Daytrippers
<b>Average age of household head</b>	45.9 years of age	47.0 years of age
<b>Education of Household Head</b>		
High school or less	16.2%	19.0%
Some college - no degree	23.1%	31.3%
Completed college	40.5%	38.2%
Post Graduate College	20.2%	11.5%
<b>Annual Household Income</b>		
Less than \$25,000	13.3%	17.2%
\$25,000-\$49,999	23.1%	31.5%
\$50,000-\$74,999	20.9%	23.9%
\$75,000 & over	42.4%	27.2%
<b>Marital Status</b>		
Married	61.5%	59.3%
Never married	20.3%	16.8%
Divorced, widowed, separated	18.2%	23.9%
<b>Ethnicity</b>		
White	83.2%	82.5%
Black/African American	10.8%	12.5%
Asian or Pacific Islander	2.2%	0.6%
Other	3.8%	4.4%

## **2011 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 2011 also topped Charlotte as the top market for daytrippers.

<b>NC Overnights</b>	<b>NC Daytrippers</b>
Raleigh-Durham-Fayetteville (11.7%)	Raleigh-Durham-Fayetteville (22.7%)
Charlotte (9.5%)	Charlotte (21.1%)
Greensboro-High Point-Winston Salem (6.8%)	Greensboro-High Point-Winston Salem (11.2%)
Atlanta (5.5%)	Greenville-Spartanburg-Asheville (10.4%)
New York (4.3%)	Greenville-New Bern-Washington (9.7%)
Greenville-New Bern-Washington (4.0%)	Wilmington (5.0%)
Greenville-Spartanburg-Asheville (3.7%)	Norfolk-Portsmouth-Newport News (3.5%)
Washington, DC (Hagerstown, MD) (3.3%)	Atlanta (2.5%)
Norfolk-Portsmouth-Newport News (2.7%)	Columbia (2.8%)
Knoxville (2.7%)	Roanoke-Lynchburg (2.0%)
Tampa-St. Petersburg-Sarasota (2.0%)	Myrtle Beach-Florence (1.6%)
Philadelphia (1.9%)	Tri-Cities, TN-VA (1.0%)
Wilmington (1.9%)	Chattanooga (0.9%)
Richmond-Petersburg (1.8%)	Washington, DC (Hagerstown, MD) (0.8%)
Orlando-Daytona Beach-Melbourne (1.6%)	Knoxville (0.8%)

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

## 2011 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.