



2012 International Visitation to North Carolina

July 2013

North Carolina Division of Tourism, Film and Sports Development

Report developed in conjunction with



Executive Summary

International Visitation to North Carolina

- Applying conservative assumptions to empirical data provides that an estimated 669,058 international visitors travel to North Carolina (this total *does not* include Canada).
- Approximately \$314 million in spending is associated with these visitors. The top ten origin countries represent 54 percent of visitation and 51 percent of spending.
- In terms of market share of international visitors to North Carolina, the United Kingdom is the top market with 13% of market share and 11% of spending. Germany (market share, 11%; spending, 8%) and China (market share, 5%; spending, 8%) are the next top markets. Other top countries in terms of volume are Mexico, Japan, India, France, Brazil and Italy.
- In terms of spending per visitor, visitors from China/Hong Kong spend the most with an average of \$788 per visitor, up from \$737 per visitor in 2011. Visitors from Switzerland followed with an average per person spending of \$620, followed by visitors from Japan with \$598 per visitor. Other top countries with high per person spending are Brazil (\$535), Venezuela (\$524) and South Korea (\$495). Spending includes only spending that occurs in North Carolina. Air fares and other pre-paid expenses are not included.
- Visitors from Asia, in particular India and Japan, spend a much larger proportion of their total spending on lodging than European visitors to North Carolina. This is likely due to a longer length of stay, though China is an exception. Chinese visitors spend approximately 20% of their travel budget on lodging. Likewise, visitors from Switzerland are the European exception, spending over 35% of their travel dollars. Visitors from Latin America spend less on lodging than Europeans, particularly those from Venezuela.
- Visitors from Europe tend to spend more on restaurants and dining, while visitors from South America, Mexico and India spend more in supermarkets, indicating that they may be cooking in their places of lodging rather than eating out. Eighteen percent of spending in NC by Venezuelan visitors is in supermarkets, while less than nine percent is spent in restaurants and quick service establishments.
- Visitors from South America, Mexico, and China spend more of their total travel budget on retail in general, particularly in radio/TV/stereo stores, department stores, specialty retail and discount stores. Brazilians, Venezuelans and Chinese spend over half of their total spending in NC in retail.
- German and Italian visitors spend a larger proportion of total spending on auto rental and gasoline/oil than visitors to North Carolina from any other country, followed closely by visitors from South Korea and Switzerland.
- Spending in clothing and jewelry stores rank fairly high in most countries of origin, particularly China/Hong Kong, Venezuela and Sweden.

**Table 1: North Carolina's Top 15 International Markets by Market Share
(Ranked by Total Spend)**

Rank	Country of Origin	2012 Estimated Visitors	% change from 2011	2012 Total Spent	% change from 2011	Average Spending per Visitor
1	United Kingdom	87,203	+7.0%	\$34,833,610	+5.1%	\$399
2	China/Hong Kong	33,310	+8.7%	\$26,251,327	+14.1%	\$788
3	Germany	73,847	+21.0%	\$24,245,305	+4.1%	\$328
4	Japan	29,902	-7.7%	\$17,890,304	-8.1%	\$598
5	Mexico	32,151	-24.3%	\$13,207,069	-24.9%	\$411
6	India	29,599	-5.8%	\$12,637,406	-14.5%	\$427
7	Brazil	18,960	-16.3%	\$10,142,468	-19.6%	\$535
8	France	28,326	+9.3%	\$9,804,419	+8.7%	\$346
9	Italy	13,945	+5.4%	\$6,012,719	+5.9%	\$431
10	Switzerland	8,755	-11.3%	\$5,428,100	-12.3%	\$620
11	South Korea	10,781	-15.0%	\$5,331,880	-15.0%	\$495
12	Australia	11,136	-26.1%	\$4,728,704	-24.8%	\$425
13	Sweden	10,857	+16.9%	\$4,292,964	+24.0%	\$395
14	Ireland	8,693	+5.5%	\$4,269,881	+8.1%	\$491
15	Venezuela	4,400	-8.3%	\$2,307,373	-10.9%	\$524
TOTAL		669,058	-2.1%	\$314,093,518	+0.7%	\$469

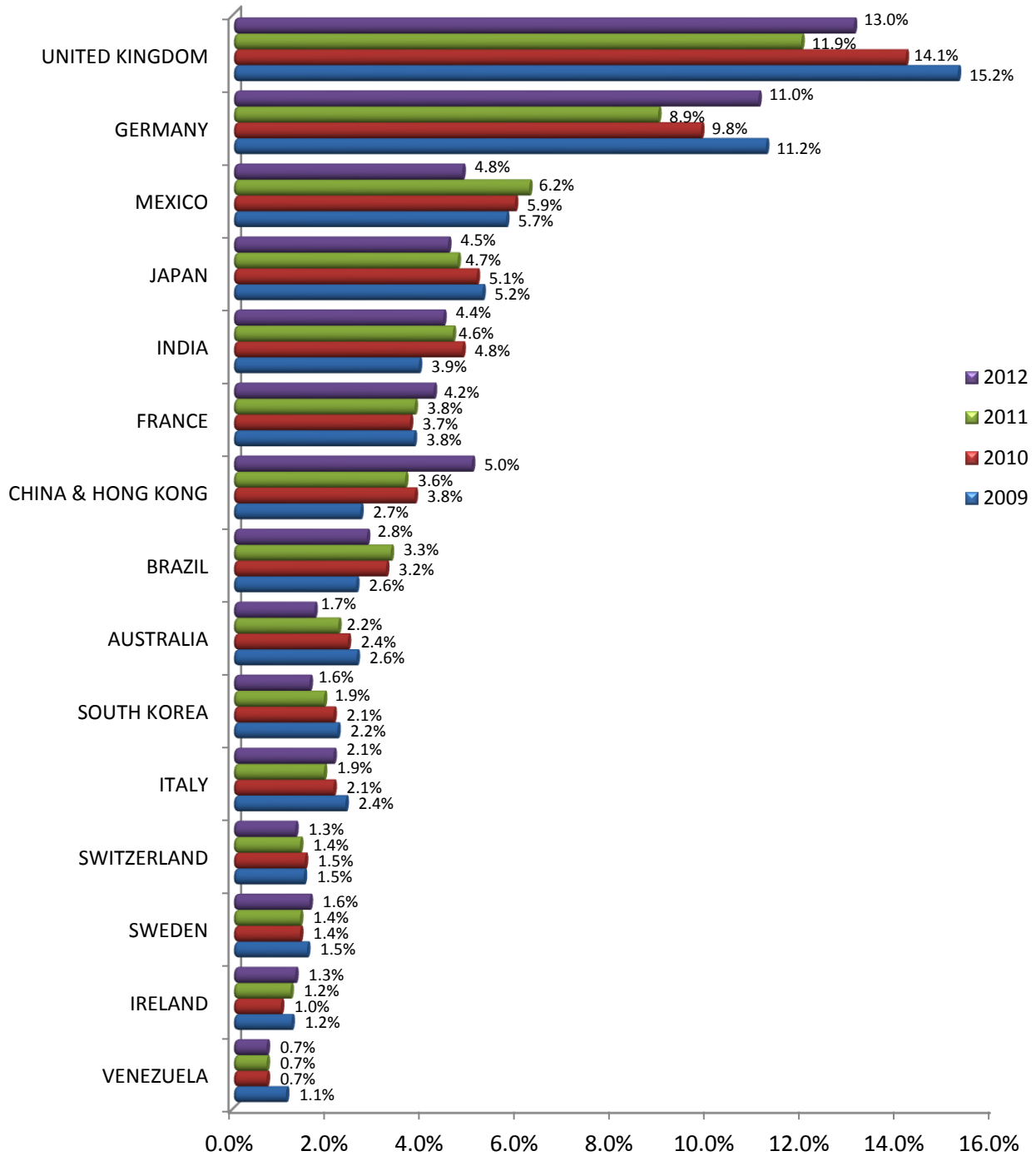
*Canada not included

** Spending only includes what is spent in North Carolina.

***North Carolina Division of Tourism estimates based on extrapolations from government data and aggregate Visa usage data provided by VisaVue Travel for the period of calendar year 2012.

- The United Kingdom ranks #1 in terms of volume of international visitors to North Carolina with over 87,000 visitors, up seven percent from 2011. Spending by UK visitors increased five percent and is estimated at \$34.8 million (11.1% of all international spending in North Carolina).
- In terms of visitor volume, Germany is next largest country of origin for North Carolina with over 73,000 visitors (+21%) and \$24.2 million in spending, up 4% from 2011.
- In terms of total spending in North Carolina, China/Hong Kong ranks second with an estimated \$26.3 million in total spending. These visitors also have the highest per person spending average at \$788, followed by visitors from Switzerland (\$620) and Japan (\$598).
- China ranks third in visitor volume behind the UK and Germany. However, the gap between the second and third position in terms of visitor market share is very large.

Chart 1: Market Share of Top International Countries of Origin to North Carolina



- The United Kingdom ranks #1 in terms of market share of international visitors to North Carolina with 13 percent of market share, and regained some of the share lost in 2011. Germany, France, China, Italy and Sweden also increased market share in 2011.
- Germany (11.0%), China/Hong Kong (5.0%), and Mexico (4.8%) were the next top markets by market share.
- The top 15 countries of origin represent 60 percent of market share of international visitation to North Carolina.

Chart 2: Volume Growth of Top International Markets to North Carolina

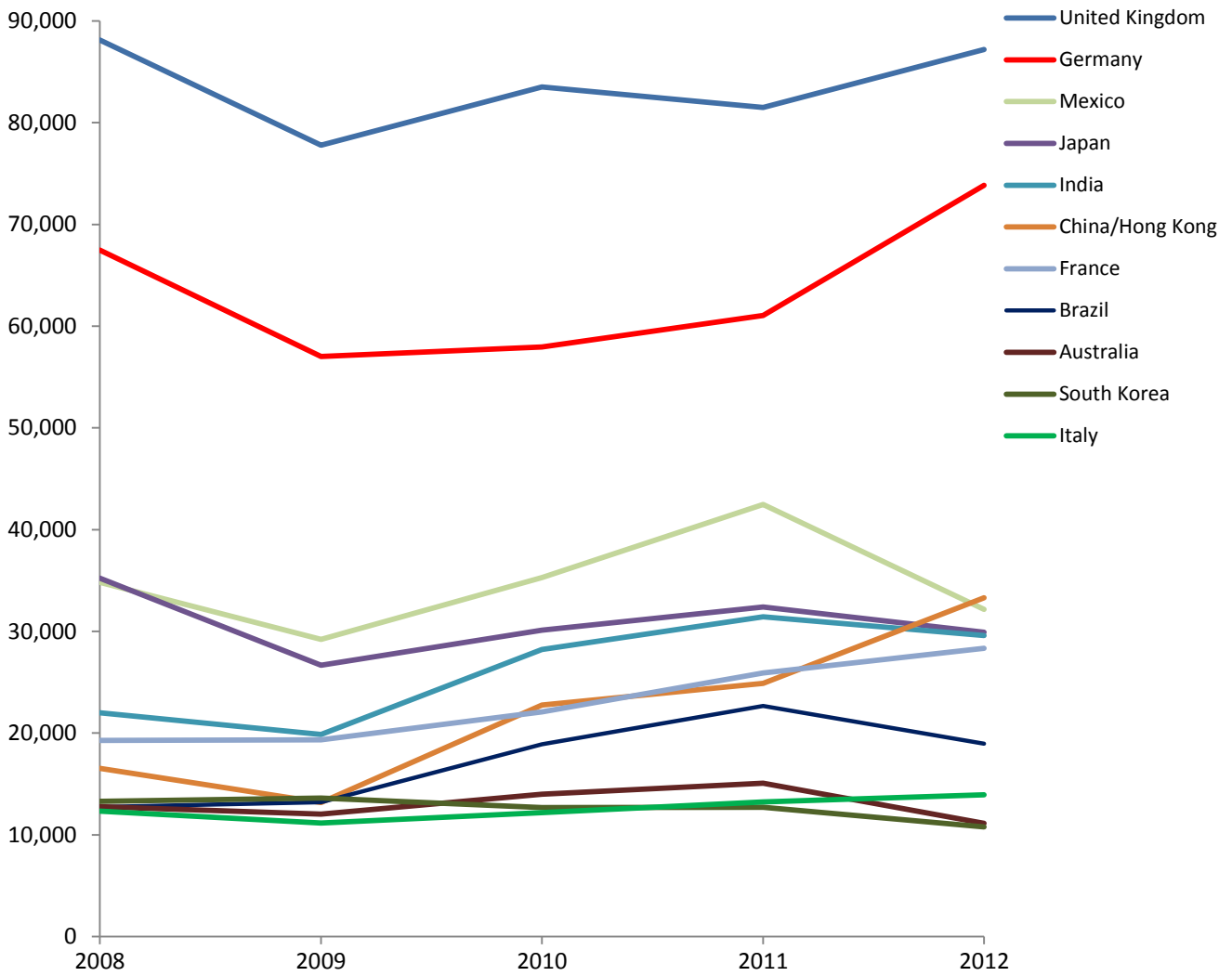
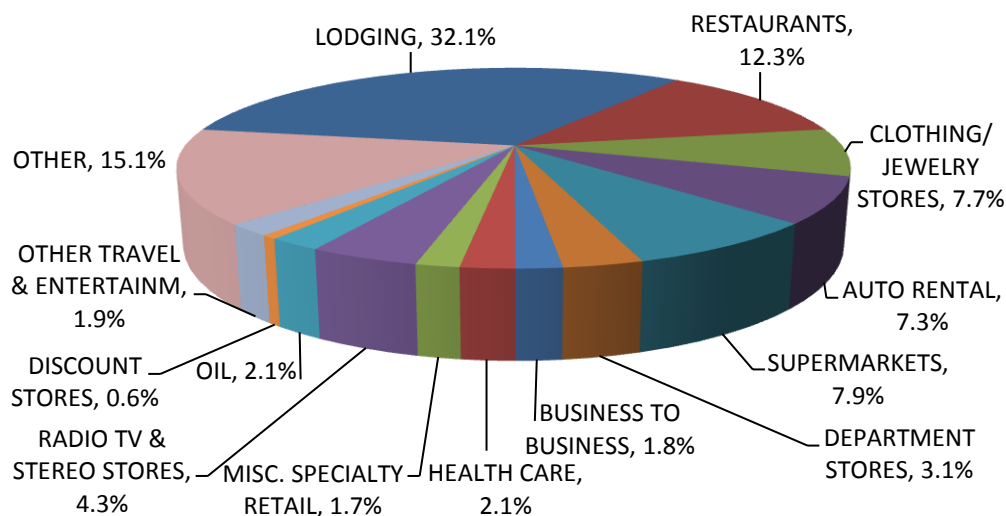


Chart 3: Spending by Merchant Category for the UK Market in North Carolina



- In the UK market, lodging represents one of the largest consumer card spending categories followed by “other”. “Other” includes categories such as miscellaneous retail, drug stores/pharmacies, furniture stores, etc.
- UK visitors spend a larger proportion of their total spending on lodging and restaurants than visitors from other countries. These visitors have the second largest proportion of restaurant spending, following only visitors from Italy.

Table 2: UK Spending in North Carolina

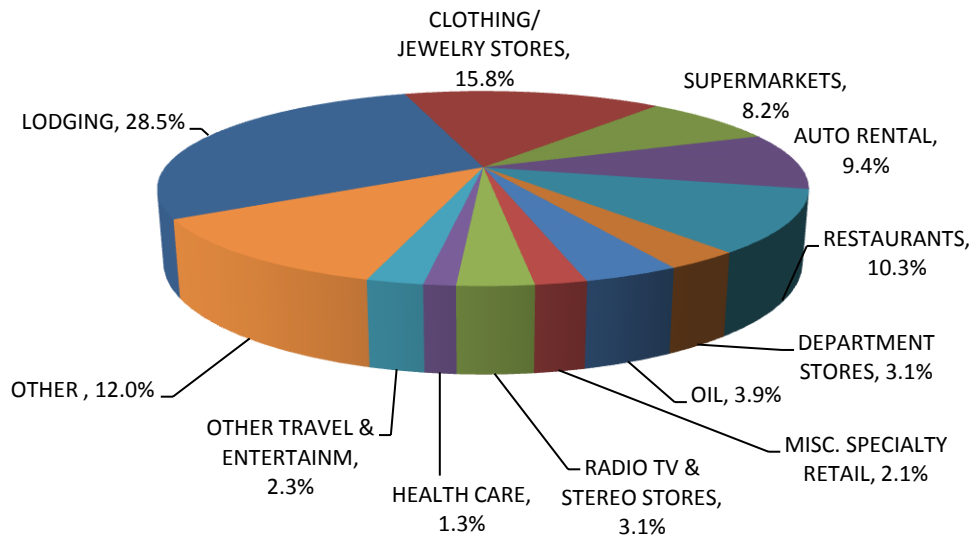
Category	Percent of Total	Spending	% Growth from 2011
Lodging	32.1%	\$11.2M	+4.0%
Restaurants	12.3%	\$4.3M	+11.4%
Supermarkets	7.9%	\$2.7M	+38.6%
Clothing/Jewelry Stores	7.7%	\$2.7M	+0.1%
Auto Rental	7.3%	\$2.6M	+0.6%
Radio/TV/Stereo Stores	4.3%	\$1.5M	+17.8%
Department Stores	3.1%	\$1.1M	-9.8%
Oil	2.1%	\$716,039	-1.1%
Health Care	2.1%	\$746,072	+13.4%
Specialty Retail	1.7%	\$591,200	+6.8%
Sub Total	80.6%	\$28.1M	
Total	100.0%	\$34.8M	+5.1%

Table 3: UK Visitor Volume 2008-2012

UK Visitor Volume	2008	2009	2010	2011	2012
	88,138	77,788 -11.7%	81,497 +7.3%	81,497 -2.4%	87,203 +7.0%

- Visitation to North Carolina by UK visitors increased 7 percent from 2011, and is nearly to the 2008 peak.
- The UK remains the top international market for North Carolina.

Chart 4: Spending by Merchant Category for the German Market in North Carolina



- German visitors spend a larger proportion of their total spending on “auto rental” and consequently “oil” than visitors from most other countries, with the exception of Italy.
- In 2012, the share of travel spending at restaurants by German visitors increased from 2011, as did the share of spending in supermarkets. This could be an indication of increased length of stay, however with lodging expenditures only up by five percent, it is more likely an indication of German visitors dining at higher priced restaurants.

Table 4: German Spending in North Carolina

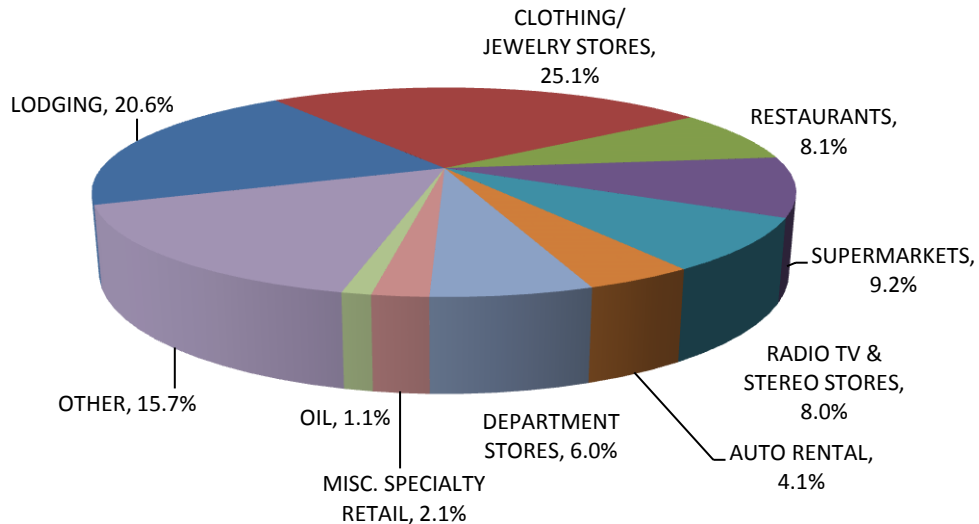
Category	Percent of Total	Spending	% Growth from 2011
Lodging	28.5%	\$6.9M	+5.5%
Clothing/Jewelry Stores	15.8%	\$3.8M	+6.6%
Restaurants	10.3%	\$2.5M	+10.6%
Auto Rental	9.4%	\$2.3M	0.0%
Supermarkets	8.2%	\$2.0M	+14.8%
Oil	3.9%	\$954,291	-2.7%
Radio/TV/Stereo Stores	3.1%	\$746,947	-22.7%
Department Stores	3.1%	\$744,696	-16.0%
Other Travel & Entertainment	2.3%	\$557,380	+25.8%
Specialty Retail	2.1%	\$501,949	+15.5%
Sub Total	86.7%	\$21.0M	
Total	100.0%	\$24.2M	+4.1%

Table 5: German Visitor Volume 2008-2012

German Visitor Volume	2008	2009	2010	2011	2012
	67,471	57,031 -15.5%	57,951 +1.6%	61,053 +5.4%	73,847 +21.0%

- German visitation increased dramatically in 2012 and even topped the previous peak from 2008.
- Germany remains #2 in terms of international visitation to North Carolina.

Chart 5: Spending by Merchant Category for the Chinese/Hong Kong Market in North Carolina



- Chinese visitors to North Carolina spend over one-fourth of their total spending in clothing/jewelry stores, the largest proportion of any other top market. They spend over half (53%) of their total spending in retail in general.
- Chinese visitors spend less than average in restaurants, and about average in supermarkets, compared to other countries.

Table 6: Chinese/Hong Kong Spending in North Carolina

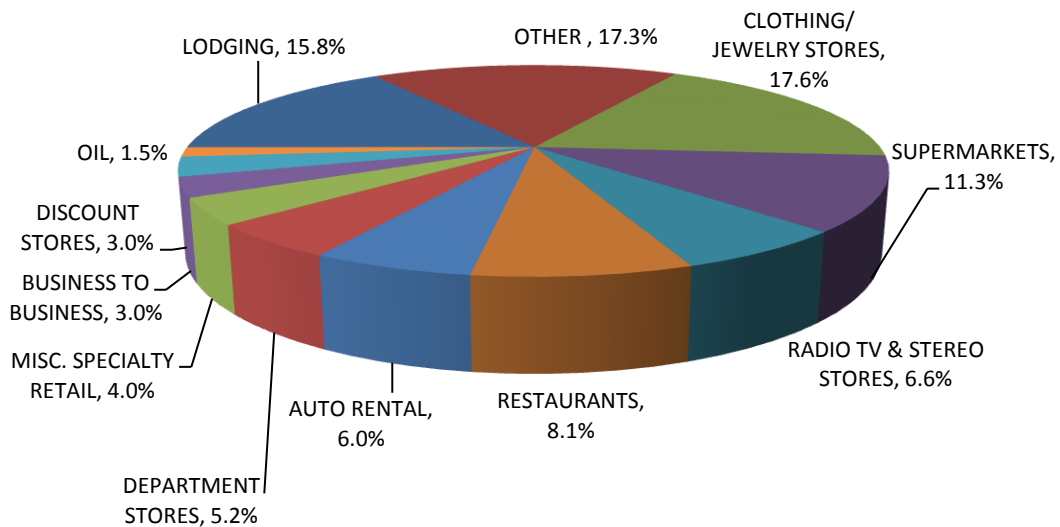
Category	Percent of Total	Spending	% Growth from 2011
Clothing/Jewelry Stores	25.1%	\$6.6M	+33.5%
Lodging	20.6%	\$5.4M	-2.4%
Supermarkets	9.2%	\$2.4M	+22.2%
Restaurants	8.1%	\$2.1M	+10.3%
Radio TV & Stereo Stores	8.0%	\$2.1M	+21.3%
Department Stores	6.0%	\$1.6M	+3.8%
Auto Rental	4.1%	\$1.1M	-6.0%
Specialty Retail	2.1%	\$546,874	+5.4%
Sub Total	83.1%	\$21.8	
Total	100.0%	\$26.3	+14.1%

Table 7: Chinese/Hong Kong Visitor Volume 2008-2012

Chinese/Hong Kong Visitor Volume	2008	2009	2010	2011	2012
	16,530	13,161	22,745	24,899	33,310
		-20.4%	+72.8%	+9.5%	+8.7%

- Visitation to North Carolina by Chinese visitors continued its growth from 2011 to 2012 (+9%). China is now ranked #3 in terms of international visitation to North Carolina.
- Interestingly, while volume increased, spending in lodging decreased as well as auto rental expenditures. This indicates a shorter length of stay by Chinese visitors. Spending in all other categories increased.

Chart 6: Spending by Merchant Category for the Mexican Market in North Carolina



- Mexican visitors spend a smaller proportion of their total spending on lodging than visitors from other countries, just sixteen percent of total spending in the state.
- These visitors do spend a larger proportion on retail. Nearly half (49.6%) of their spending is in retail, particularly in clothing and jewelry stores.

Table 8: Mexican Spending in North Carolina

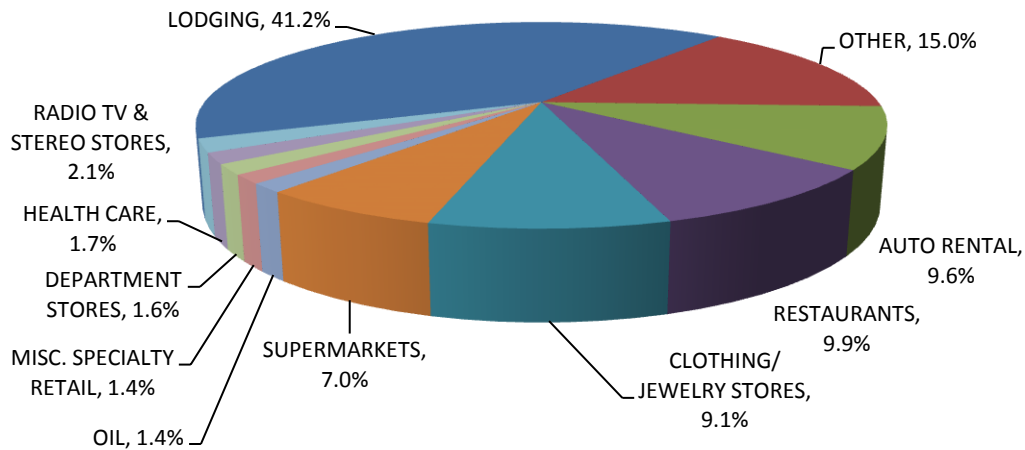
Category	Percent of Total	Spending	% Growth from 2011
Clothing/Jewelry Stores	18.2%	\$2.4M	-24.3%
Lodging	15.8%	\$2.1M	-26.1%
Supermarkets	11.3%	\$1.5M	-25.0%
Restaurants	8.1%	\$1.1M	-25.5%
Radio TV & Stereo Stores	6.6%	\$873,102	-35.1%
Auto Rental	6.0%	\$791,249	-19.2%
Department Stores	5.2%	\$691,885	-36.1%
Specialty Retail	4.0%	\$522,942	-20.3%
Discount Stores	3.0%	\$399,615	+4.4%
Sub Total	78.1%	\$10.3M	
Total	100.0%	\$13.2M	-24.9%

Table 9: Mexican Visitor Volume 2008-2012

Mexican Visitor Volume	2008	2009	2010	2011	2012
	34,805	29,207	35,296	42,470	32,151
		-16.1%	+20.8%	+20.3%	-24.3%

- Mexican visitation to decreased nearly 25 percent from 2011 to below 2008 levels and dropped from #3 to #4 in terms of visitors to the state in 2012.

Chart 7: Spending by Merchant Category for the Japanese Market in North Carolina



- Japanese visitors to North Carolina spend more of their total spending on lodging than European and South American visitors, but less on retail in general.
- Japanese visitors spend a higher than average proportion of spending on auto rentals.

Table 10: Japanese Spending in North Carolina

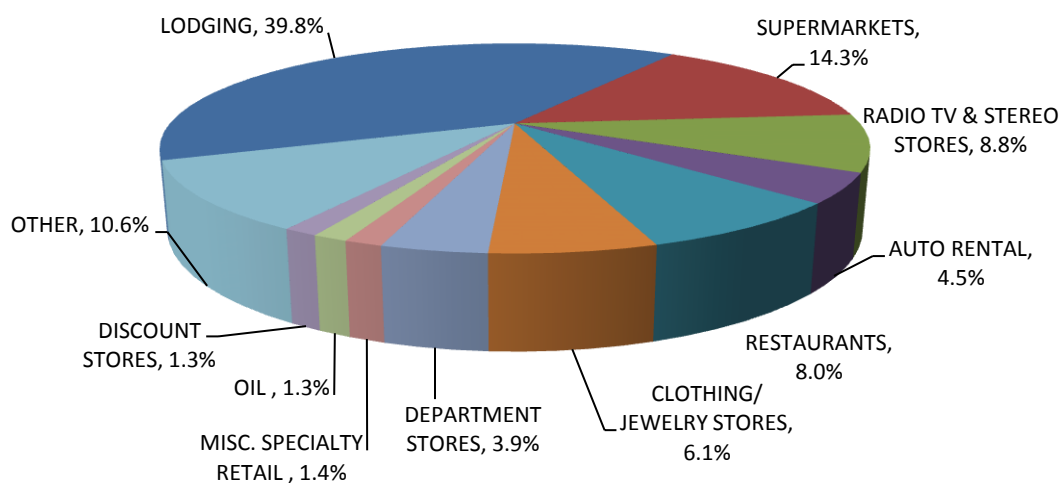
Category	Percent of Total	Spending	% Growth from 2011
Lodging	41.2%	\$7.4M	-2.5%
Restaurants	9.9%	\$1.8M	-2.4%
Auto Rental	9.6%	\$1.7M	+1.5%
Clothing/Jewelry Stores	9.1%	\$1.6M	-20.6%
Supermarkets	7.0%	\$1.3M	-8.3%
Business to Business	3.1%	\$550,804	+56.9%
Radio TV & Stereo Stores	2.1%	\$378,511	-18.2%
Health Care	1.7%	\$300,023	-27.0%
Department Stores	1.6%	\$278,337	-25.6%
Sub Total	85.1%	\$15.2M	
Total	100.0%	\$17.9M	-8.1%

Table 11: Japanese Visitor Volume 2008-2012

Japanese Visitor Volume	2008	2009	2010	2011	2012
	35,227	26,679	30,111	32,383	29,902
		-24.3%	+12.9%	+7.5%	-7.7%

- Visitation from Japanese travelers dropped back to 2010 levels in 2012 (-8%). While volume and total spending dropped proportionately, spending on auto rentals increased, suggesting that Japanese visitors to North Carolina are more mobile than before.
- Japan ranks #5 in terms of international visitation to North Carolina.

Chart 8: Spending by Merchant Category for the *Indian* Market in North Carolina



- Visitors to North Carolina from India spend a larger than average proportion of their total in-state spending on lodging (40%), second only to Japan.
- These visitors spend a less than average proportion of their total spending on restaurants, but the largest of any top market at quick service restaurants (QSRs). They also spend a higher than average proportion at supermarkets (14%).
- Visitors from India spend a smaller than average proportion of their NC travel dollars in retail in general, with the exception of in radio/TV and stereo stores where they spend nearly 9%.

Table 12: Indian Spending in North Carolina

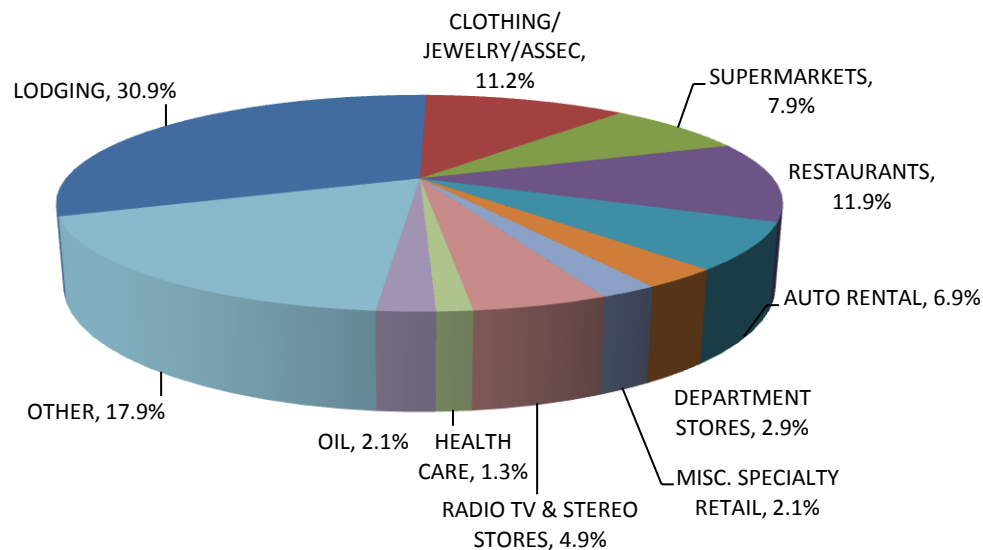
Category	Percent of Total	Spending	% Growth from 2011
Lodging	39.8%	\$5.0M	-15.0%
Supermarkets	14.3%	\$1.8M	-5.8%
Radio/TV/Stereo Stores	8.8%	\$1.1M	-13.6%
Restaurants	8.0%	\$1.0M	-8.4%
Clothing/Jewelry Stores	6.1%	\$768,118	-12.2%
Auto Rental	4.5%	\$573,054	-39.9%
Department Stores	3.9%	\$490,205	-11.1%
Specialty Retail	1.4%	\$173,304	-6.3%
Discount Stores	1.3%	\$170,475	-35.0%
Oil	1.3%	\$158,384	-27.1%
Sub Total	89.3%	\$11.3M	
Total	100.0%	\$12.6M	-14.5%

Table 13: Indian Visitor Volume 2008-2012

Indian Visitor Volume	2008	2009	2010	2011	2012
	21,993	19,868	28,216	31,424	29,599
		-10.5%	+42.0%	+11.4%	-5.8%

- After two years of healthy increases in Indian visitation to North Carolina, volume dropped nearly six percent in 2012. However, visitor volume is still higher than in 2010.
- India ranks #6 in terms of international visitation to North Carolina.

Chart 9: Spending by Merchant Category for the French Market in North Carolina



- French visitors to North Carolina spend nearly one-third of their total spending on lodging – less than most other European visitors, but more than Asian or South American markets.
- French spending at specialty retail stores, relative to other spending, grew nearly thirty percent in 2012.

Table 14: French Spending in North Carolina

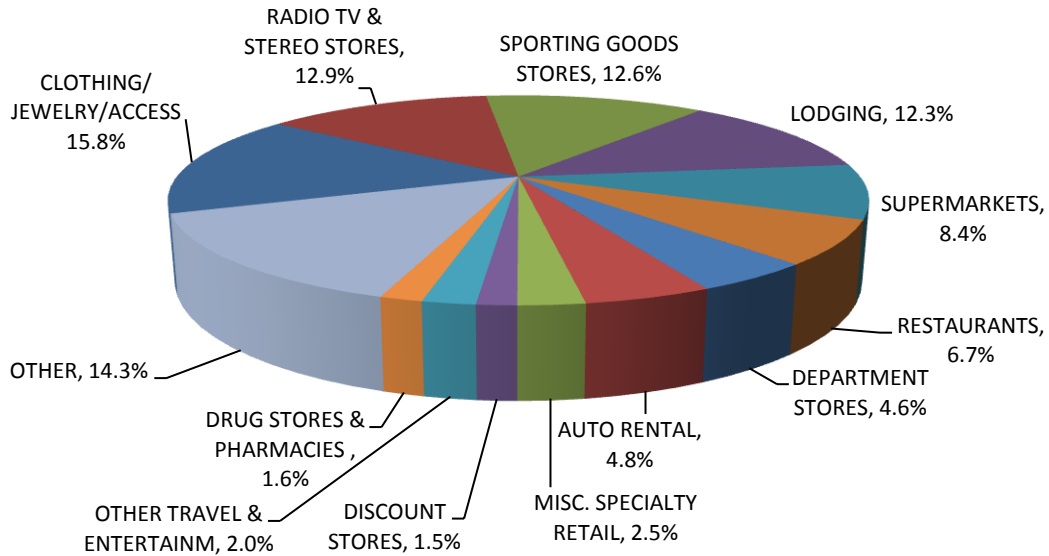
Category	Percent of Total	Spending	% Growth from 2011
Lodging	30.9%	\$3.0M	+12.1%
Clothing/Jewelry Stores	11.2%	\$1.1M	+8.0%
Restaurants	11.9%	\$1.2M	+20.8%
Supermarkets	7.9%	\$772,774	+10.2%
Auto Rental	6.9%	\$677,714	-0.1%
Radio TV & Stereo Stores	4.9%	\$480,662	+1.2%
Department Stores	2.9%	\$284,334	-8.6%
Other Travel & Entertainment	2.8%	\$273,882	-15.2%
Oil	2.1%	\$208,508	+2.1%
Miscellaneous Specialty Stores	2.1%	\$201,590	+28.4%
Sub Total	83.5%	\$8.2M	
Total	100.0%	\$9.8M	+8.7%

Table 15: French Visitor Volume 2008-2012

French Visitor Volume	2008	2009	2010	2011	2012
	19,262	19,327 +0.3%	22,072 +14.2%	25,913 +17.4%	28,326 +9.3%

- The French market has seen four consecutive years of visitation increases and saw its largest visitation on record in 2012. France ranks #7 in terms of international visitation to the state.

Chart 10: Spending by Merchant Category for the *Brazilian* Market in North Carolina



- Brazilian visitors to North Carolina spend a larger proportion of money in retail in general (59%) than visitors from any other top country of origin, particularly in radio, TV and stereo stores (13%) and sporting goods stores (13%).
- Only twelve percent of their total spending is in lodging establishments.
- Brazilian visitors to North Carolina spend the smallest proportion of their total spending on restaurants (7%) when compared to all other origin markets.

Table 16: Brazilian Spending in North Carolina

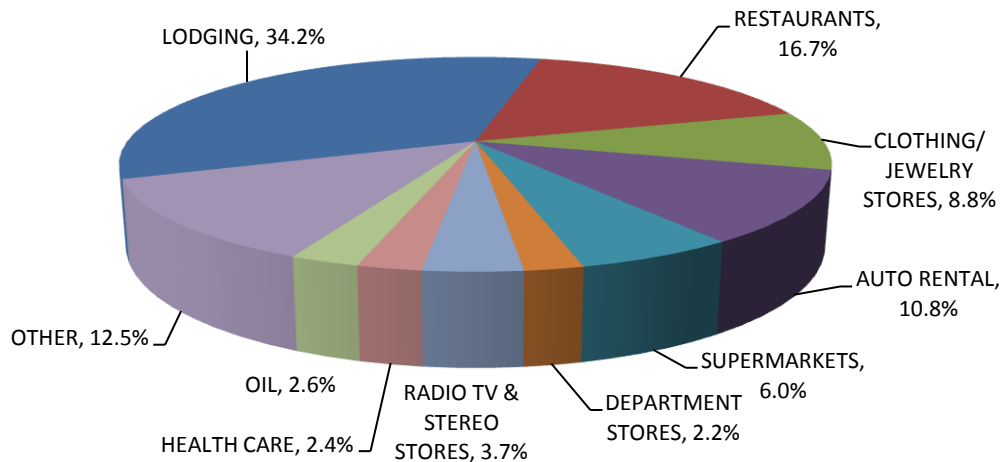
Category	Percent of Total	Spending	% Growth from 2011
Clothing/Jewelry Stores	15.8%	\$1.6M	-28.5%
Radio TV & Stereo Stores	12.9%	\$1.3M	-35.3%
Sporting Goods Stores	12.6%	\$1.3M	+221.3%
Lodging	12.3%	\$1.3M	-18.7%
Supermarkets	8.4%	\$848,368	-25.7%
Restaurants	6.7%	\$683,087	-7.9%
Auto Rental	4.8%	\$483,274	-8.4%
Department Stores	4.6%	\$463,722	-31.8%
Miscellaneous Specialty Retail	2.5%	\$249,387	-25.9%
Sub Total	80.5%	\$8.2M	
Total	100.0%	\$10.1M	-19.6%

Table 17: Brazilian Visitor Volume 2008-2012

Brazilian Visitor Volume	2008	2009	2010	2011	2012
	12,745	13,212 +3.7%	18,883 +42.9%	22,665 +20.0%	18,960 -16.3%

- Following large gains in visitation in 2010 and 2011, Brazil visitor volume decreased sixteen percent in 2012, though is still above 2010 levels. The country remains at the #8 position of top markets to the state.

Chart 11: Spending by Merchant Category for the Italian Market in North Carolina



- Of the fifteen top origin markets, Italian visitors to North Carolina spend the largest proportion of their total spending on restaurants (17%) and auto rental/oil (13%).
- Visitors from Italy spend the smallest proportion of their total spending retail in general (23%).
- While a relatively small proportion of Italian visitor spending is on healthcare in North Carolina, they spend a larger proportion than any other country of origin (2.4%).

Table 18: Italian Spending in North Carolina

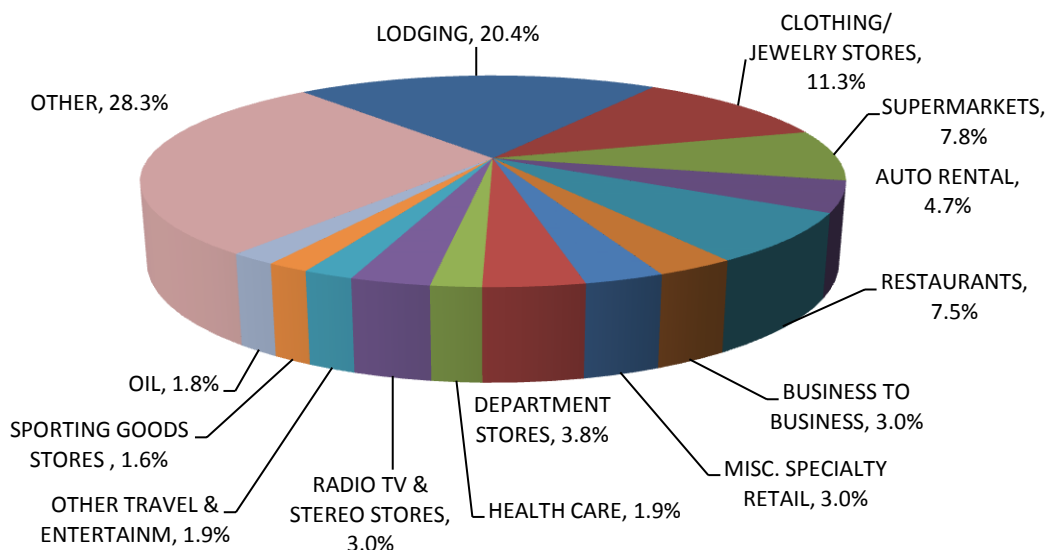
Category	Percent of Total	Spending	% Growth from 2011
Lodging	34.2%	\$2.1M	+14.6%
Restaurants	16.7%	\$1.0M	+29.9%
Auto Rental	10.8%	\$649,520	+16.3%
Clothing/Jewelry Stores	8.9%	\$536,027	+5.2%
Supermarkets	6.0%	\$362,131	-18.3%
Radio TV & Stereo Stores	3.7%	\$221,866	+0.8%
Oil	2.6%	\$156,213	+16.9%
Health Care	2.4%	\$145,837	-41.0%
Department Stores	2.2%	\$131,511	+1.0%
Sub Total	87.6%	\$5.3M	
Total	100.0%	\$6.0M	+5.9%

Table 19: Italian Visitor Volume 2008-2012

Italian Visitor Volume	2008	2009	2010	2011	2012
	12,316	11,152	12,177	13,234	13,945
		-9.5%	+9.2%	+8.7%	+5.4%

- Italy, as a country of origin market, experienced a third year of positive growth in terms of visitor volume. Italy ranks 9 (up from #10 in 2011) in terms of North Carolina's international markets.

Chart 12: Spending by Merchant Category for the *Australian* Market in North Carolina



- Australian visitors to North Carolina spend a slightly less than average proportion of their NC travel dollars in lodging than other countries of origin, about the same as visitors from China.
- Australians spend a slightly larger proportion of spending in supermarkets (7.8%) than in restaurants (7.5%).
- Visitors from Australia spend a larger than average proportion of their total spending in retail in general. Nearly half (46%) of their total spending is in retail.

Table 20: Australian Spending in North Carolina

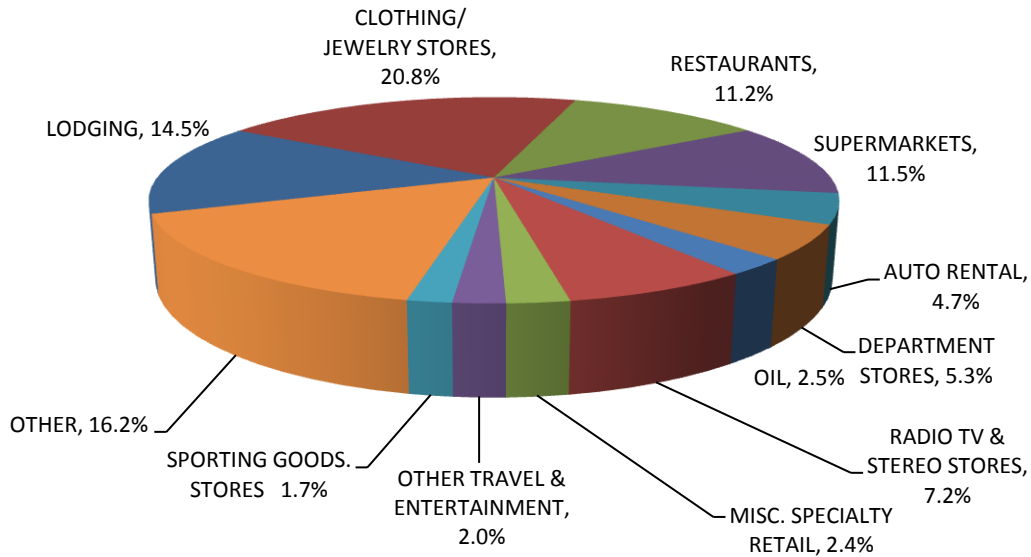
Category	Percent of Total	Spending	% Growth from 2011
Lodging	20.4%	\$966,696	-28.8%
Clothing/Jewelry Stores	11.3%	\$532,082	-29.5%
Supermarkets	7.8%	\$369,599	-17.8%
Restaurants	7.5%	\$356,190	-21.2%
Auto Rental	4.7%	\$223,512	-36.5%
Department Stores	3.8%	\$178,710	-19.4%
Radio TV & Stereo Stores	3.0%	\$140,830	-36.4%
Miscellaneous Specialty Retail	3.0%	\$143,107	-21.0%
Business to Business	3.0%	\$141,384	-12.6%
Health Care	1.9%	\$90,037	-52.9%
Sub Total	66.4%	\$3.1M	
Total	100.0%	\$4.7M	-24.8%

Table 21: Australian Visitor Volume 2008-2012

Australian Visitor Volume	2008	2009	2010	2011	2012
	12,769	12,018 -5.9%	13,997 +16.5%	15,072 +7.7%	11,136 -26.1%

- Australian visitation dropped dramatically in 2012, dropping the country to #10 in market share for NC international visitation. Likewise, all spending categories revealed decreases in 2012 from 2011.

Chart 13: Spending by Merchant Category for the Swedish Market in North Carolina



- Swedish visitors to the state spend a larger than average proportion of their total spending on retail in general, and in clothing/jewelry stores in particular. Nearly half (49%) of their NC travel dollars are spent in retail.
- Visitors from Sweden spend about eleven percent of their total spending in both restaurants (11.2%) and supermarkets (11.5%).

Table 22: Swedish Spending in North Carolina

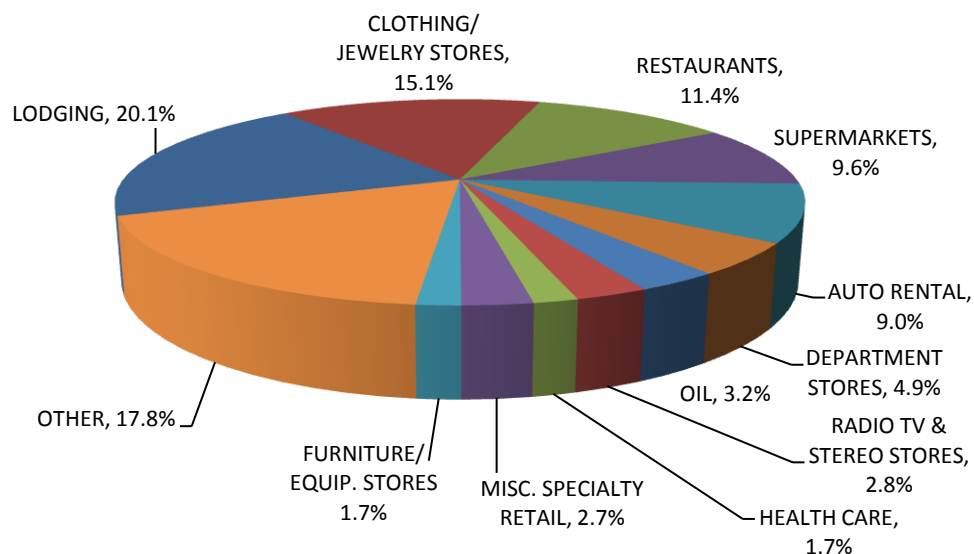
Category	Percent of Total	Spending	% Growth from 2011
Clothing/Jewelry Stores	20.8%	\$890,885	+22.3%
Lodging	14.5%	\$624,492	+37.9%
Supermarkets	11.5%	\$495,574	+35.0%
Restaurants	11.2%	\$481,367	+34.3%
Radio TV & Stereo Stores	7.2%	\$310,322	+17.8%
Department Stores	5.3%	\$226,423	+0.5%
Auto Rental	4.7%	\$203,845	+28.3%
Oil	2.5%	\$106,257	+5.9%
Miscellaneous Specialty Retail	2.4%	\$102,598	+8.9%
Other Travel & Entertainment	2.0%	\$85,906	+53.7%
Sporting Goods Stores	1.7%	\$72,432	-8.0%
Sub Total	83.9%	\$3.6M	
Total	100.0%	\$4.3M	+24.0%

Table 23: Swedish Visitor Volume 2008-2012

Swedish Visitor Volume	2008	2009	2010	2011	2012
	10,625	7,555	8,302	9,289	10,857
		-28.9%	+9.9%	+11.9%	+16.9%

- Visitation from Sweden fell nearly thirty percent in 2009, but in 2012 topped the previous high with a new high of over 10,800 visitors to the state. Sweden moved from #13 in 2011 to #11 in 2012 in terms of international visitation to North Carolina.

Chart 14: Spending by Merchant Category for the *South Korean* Market in North Carolina



- South Korean visitors to the state spend a larger than average proportion of their total spending on auto rentals (9%) and oil (3%), suggesting that these visitors spend time in different areas of the state while visiting. However, as the table below shows, total spending on oil decreased while spending on rentals increased in 2012. This suggests that while South Korean visitors are renting automobiles more often, they are likely using them only get from one destination to another.
- These visitors spend about forty percent of their total spending on retail in general (41%), just slightly higher the average international visitor.

Table 24: South Korean Spending in North Carolina

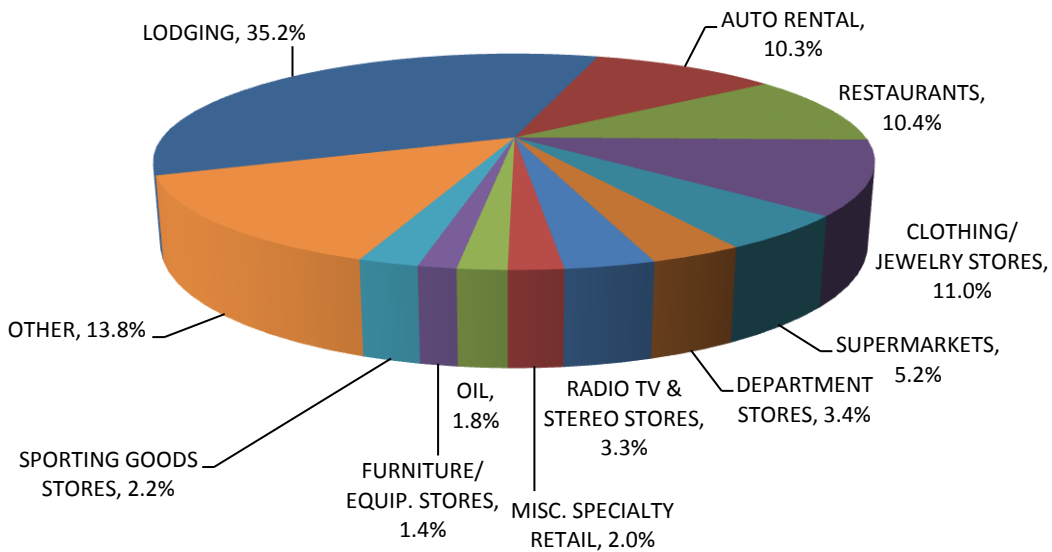
Category	Percent of Total	Spending	% Growth from 2011
Lodging	20.1%	\$1.1M	+4.2%
Restaurants	11.4%	\$608,935	-11.8%
Supermarkets	9.6%	\$512,939	-16.7%
Auto Rental	9.0%	\$481,426	+12.3%
Department Stores	4.9%	\$262,237	-29.4%
Oil	3.2%	\$168,808	-25.6%
Radio TV & Stereo Stores	2.8%	\$149,603	-36.2%
Miscellaneous Specialty Retail	2.7%	\$143,188	-3.3%
Health Care	1.7%	\$92,740	+40.9%
Furniture/Equipment Stores	1.7%	\$88,072	-20.4%
Sub Total	67.1%	\$3.6M	
Total	100.0%	\$5.3M	-15.0%

Table 25: South Korean Visitor Volume 2008-2012

South Korean Visitor Volume	2008	2009	2010	2011	2012
	13,276	13,606 +2.5%	12,666 -6.9%	12,690 +0.2%	10,781 -15.0%

- Visitation from South Korea fell fifteen percent in 2012 and slipped in ranking from 11 to 12 in terms of visitor volume, and saw less overall spending as a result.

Chart 15: Spending by Merchant Category for the Swiss Market in North Carolina



- Swiss visitors to North Carolina spend a larger than average proportion of their total spending on lodging (35%) and auto rental (10.3%).
- Visitors from Switzerland spend a smaller proportion of their total spending in supermarkets (5.2%) than other countries. As well, they don't spend as much on retail in general as other countries.

Table 26: Swiss Spending in North Carolina

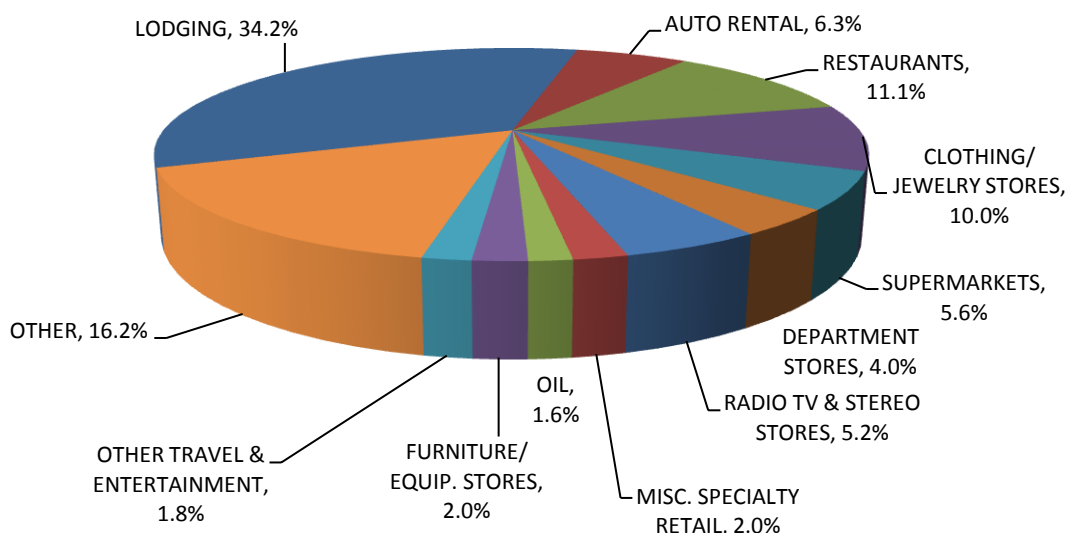
Category	Percent of Total	Spending	% Growth from 2011
Lodging	35.2%	\$1.9M	-16.5%
Clothing/Jewelry Stores	11.0%	\$594,798	-5.6%
Restaurants	10.4%	\$563,828	-8.1%
Auto Rental	10.3%	\$558,559	-7.0%
Supermarkets	5.2%	\$279,939	+9.9%
Department Stores	3.4%	\$185,253	-20.6%
Radio TV & Stereo Stores	3.3%	\$179,788	-41.2%
Sporting Goods Stores	2.2%	\$119,115	+27.5%
Miscellaneous Specialty Retail	2.0%	\$109,016	+3.4%
Oil	1.8%	\$98,936	-17.4%
Sub Total	84.7%	\$4.6M	
Total	100.0%	\$5.4M	-5.6%

Table 27: Swiss Visitor Volume 2008-2012

Swiss Visitor Volume	2008	2009	2010	2011	2012
	8,686	7,906	8,974	9,875	8,755
		-9.0%	+13.5%	+10.0%	-11.3%

- After two years of growth, visitation to North Carolina from Switzerland decreased in 2012. Visitation is still slightly above 2008 levels however.
- Switzerland ranks #13 in terms of international visitation to North Carolina.

Chart 16: Spending by Merchant Category for the Irish* Market in North Carolina



- Irish visitors to North Carolina spend a larger than average proportion of their total spending on lodging (34%), similar to the proportion spent by visitors from Italy and Switzerland.
- While spending on furniture/equipment is low relative to other spending, visitors from Ireland spend the largest proportion of their total spending in this sector (2.0%) of the top 15 countries.

Table 28: Irish Spending in North Carolina

Category	Percent of Total	Spending	% Growth from 2011
Lodging	34.2%	\$1.5M	+11.2%
Restaurants	11.1%	\$472,425	+13.3%
Clothing/Jewelry Stores	10.0%	\$428,860	+7.9%
Auto Rental	6.3%	\$269,807	-1.0%
Supermarkets	5.6%	\$239,532	-6.5%
Radio TV & Stereo Stores	5.2%	\$220,303	+21.4%
Department Stores	4.0%	\$172,747	-10.6%
Furniture/Equipment Stores	2.0%	\$85,151	+133.4%
Miscellaneous Specialty Retail	2.0%	\$84,876	-1.0%
Other Travel & Entertainment	1.8%	\$78,582	-6.5%
Oil	1.6%	\$68,879	-2.4%
Sub Total	83.9%	\$3.6M	
Total	100.0%	\$4.3M	+8.1%

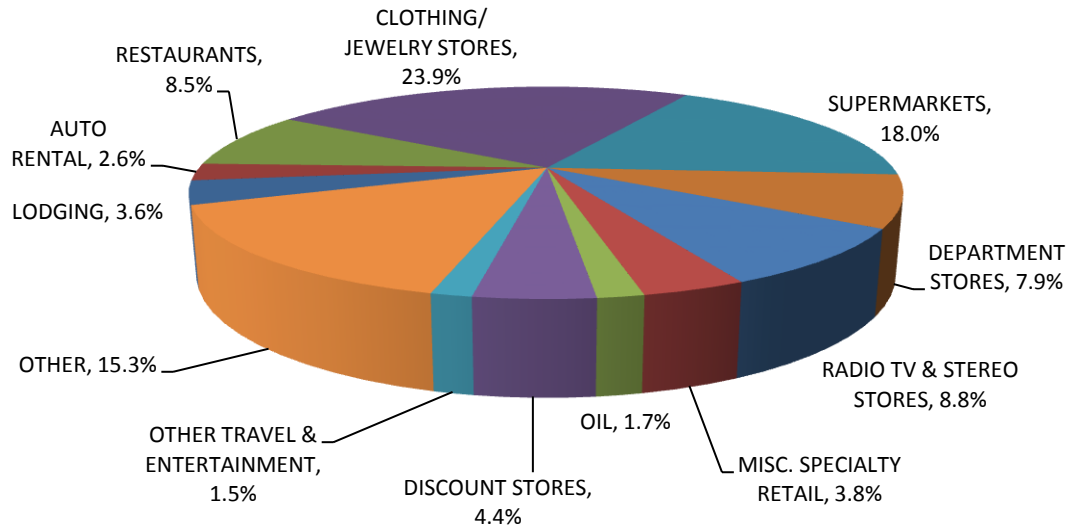
Table 29: Irish Visitor Volume 2008-2012

Swiss Visitor Volume	2008	2009	2010	2011	2012
	8,253	6,240	6,220	8,243	8,693
		-24.4%	-0.3%	+32.5%	+5.5%

- After tremendous growth from 2010 to 2011, Irish visitation settled into a healthy growth range in 2012 with over five percent growth, and set a record with over 8,600 visitors. The country ranks #14 for international visitors to North Carolina.

* This report includes only the Republic of Ireland in Irish data. Northern Ireland is included with the UK data.

Chart 17: Spending by Merchant Category for the Venezuelan Market in North Carolina



- Venezuelan visitors to North Carolina spend the lowest proportion of their travel budgets on lodging than any other top country of origin, less than four percent of their total spending.
- However, Venezuelan visitors to the state spend the largest proportions of money in supermarkets (18%), department stores (8%), discount stores (4%), and drug stores/pharmacies (3%) than any other top country.
- Venezuelans spend over half of their NC travel dollars in retail in general (58%).

Table 30: Venezuelan Spending in North Carolina

Category	Percent of Total	Spending	% Growth from 2011
Clothing/Jewelry Stores	23.9%	\$552,481	-11.3%
Supermarkets	18.0%	\$414,372	-11.1%
Radio TV & Stereo Stores	8.8%	\$203,515	+17.2%
Restaurants	8.5%	\$195,064	-3.5%
Department Stores	7.9%	\$182,086	-21.1%
Discount Stores	4.4%	\$102,080	+10.6%
Miscellaneous Specialty Retail	3.8%	\$87,366	-20.8%
Lodging	3.6%	\$82,563	+20.3%
Drug Stores & Pharmacies	2.8%	\$65,620	-24.0%
Auto Rental	2.6%	\$60,649	+46.7%
Oil	1.7%	\$38,687	-31.5%
Sub Total	86.0%	\$2.0M	
Total	100.0%	\$2.3M	-10.9%

Table 31: Venezuelan Visitor Volume 2008-2012

Swiss Visitor Volume	2008	2009	2010	2011	2012
	7,338	5,649	4,039	4,800	4,400
		-23.0%	-28.5%	+18.8%	-8.3%

- Visitation to North Carolina from Venezuela dropped eight percent in 2012, but still remains above 2010 levels.
- Venezuela ranks #15 for international visitors to North Carolina.

The below tables represent aggregate "German-speaking Europe".

Table 32: German Speaking Europe

Category	Spending	% Growth from 2011
Lodging	\$8.8M	-0.2%
Auto Rental	\$2.8M	-1.5%
Restaurants	\$3.1M	+6.6%
Clothing/Jewelry Stores	\$4.4M	+4.8%
Supermarkets	\$2.3M	+14.2%
Department Stores	\$929,949	-17.0%
Radio TV & Stereo Stores	\$926,735	-27.1%
Miscellaneous Specialty Retail	\$610,965	+13.2%
Sub Total	\$23.9M	
Total	\$29.7M	+0.7%

Table 33: German Speaking Europe Visitor Volume 2008-2012

German Speaking Europe Visitor Volume	2008	2009	2010	2011	2012
	76,157	64,937 -10.8%	66,925 +3.1%	70,928 +6.0%	82,602 +16.5%

Notes

- The data presented in the following report represents conservative projected estimates by the North Carolina Division of Tourism based on assumptions derived from government data, market penetration data and aggregate Visa usage data provided by VisaVue Travel for the period of calendar year 2011.
- Spending data is only representative of what is spent in person in North Carolina. Air transportation and other spending outside the state are not included.
- The following estimates should not be directly compared to estimates for other states, nor for other particular regions, as international visitors are likely to travel to multiple states on single visits to the US. Doing so would not allow valid comparisons for these visitors to multiple states.
- VisaVue data is broken down by personal card and commercial card levels. For the purposes of this analysis, commercial and personal data was aggregated.
- Data in the following report does not include Canadian data. Statistics Canada is the industry accepted method for projecting Canadian visitation. That data can be found on www.nccommerce.com/tourism/research.