

# 2013 International Visitation to North Carolina

## Visit North Carolina

A Unit of the Economic Development Partnership of North Carolina

Report developed in conjunction with



## Executive Summary

- Applying conservative assumptions to empirical data provides that an estimated 1.2 million international visitors travel to North Carolina. This includes more than 500,000 Canadians.
- Approximately \$437 million in spending is associated with these visitors. The top ten origin countries represent 73 percent of visitation and 64 percent of spending.
- In terms of market share of international visitors to North Carolina, the Canada is the top market with 43% of market share and 29% of spending. The top overseas market is the UK with 7.1% of market share and 7.4% of spending. Germany (market share, 6.6%; spending, 5.8%) and China (market share, 3.1%; spending, 6.4%) are the next top markets. Other top countries in terms of volume are Mexico, India, Japan, France, Brazil and Italy.
- In terms of spending per visitor, visitors from China/Hong Kong spend the most with an average of \$742 per visitor, down slightly from \$788 per visitor in 2012. Visitors from Switzerland followed with an average per person spending of \$579, followed by visitors from Japan with \$528 per visitor. Other top countries with high per person spending are Venezuela (\$518), South Korea (\$460), Italy (\$447) and Brazil (\$440). Spending includes only spending that occurs in North Carolina. Air fares and other pre-paid expenses are not included.
- Visitors from Japan and India spend a much larger proportion of their total spending on lodging than other visitors to North Carolina. This is likely due to a longer length of stay. Visitors from Switzerland, Ireland, Italy and UK also spend a higher than average proportion of their travel budgets on lodging in the state. Visitors from Latin and South America spend less on lodging than other international visitors, particularly those from Venezuela.
- Visitors from Europe tend to spend more on 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. Nineteen percent of spending by Venezuelan visitors is in supermarkets, while less than nine percent is spent in restaurants establishments.
- Visitors from South America, Mexico, Sweden, China and Australia spend more of their total travel budget on retail in general, particularly in radio/TV/stereo stores, department stores, specialty retail and discount stores. Venezuelans, Brazilians, Chinese, Mexicans and Swedish spend over half of their total spending in NC in retail.
- German and Italian visitors allocate a larger proportion of total spending on auto rental and gasoline/oil than visitors to North Carolina, followed closely by visitors from Switzerland, Japan and South Korea. Canadians spend nearly ten percent of their spending in-state on oil, but as many are drive travelers, have a lower percentage of spending on car rentals.
- 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	2013 Estimated Visitors	% change from 2012	2013 Total Spent	% change from 2012	Average Spending per Visitor
1	Canada	516,073	-6.8%	\$126,985,224	-5.3%	\$246
2	United Kingdom	86,662	-0.6%	\$32,565,004	-6.5%	\$376
3	China/Hong Kong	38,014	+14.1%	\$28,187,957	+7.4%	\$742
4	Germany	80,261	+8.7%	\$25,263,782	+4.2%	\$315
5	Japan	28,150	-5.9%	\$14,859,243	-16.9%	\$528
6	Mexico	34,132	+6.2%	\$13,206,609	0.0%	\$387
7	India	32,941	+11.3%	\$12,793,895	+1.2%	\$388
8	Brazil	24,262	+28.0%	\$10,686,986	+5.4%	\$440
9	France	26,350	-7.0%	\$9,531,840	-2.8%	\$362
10	Italy	14,196	+1.8%	\$6,352,181	+5.6%	\$447
11	Ireland	11,699	+34.6%	\$4,820,617	+12.9%	\$412
12	Switzerland	8,145	-7.0%	\$4,715,185	-13.1%	\$579
13	South Korea	9,562	-11.3%	\$4,399,578	-17.5%	\$460
14	Australia	10,172	-8.7%	\$4,241,713	-10.3%	\$417
15	Sweden	9,870	-9.1%	\$3,783,399	-11.9%	\$383
<b>TOTAL</b>		<b>1,212,941</b>	<b>-1.5%</b>	<b>\$437,331,913</b>	<b>-2.4%</b>	<b>\$361</b>

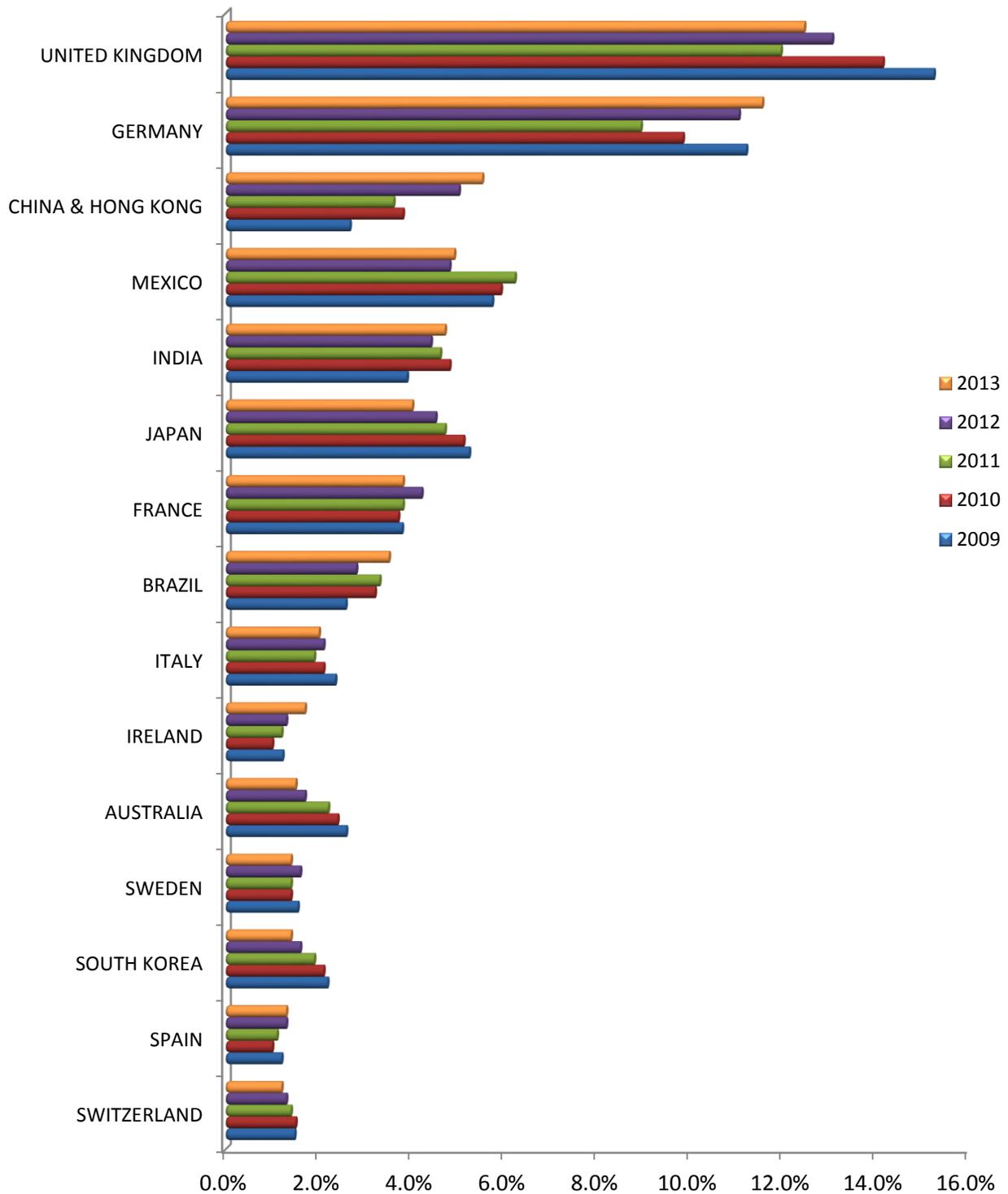
\* Spending only includes what is spent in North Carolina.

\*\* Canada is included in 2013 estimates, therefore totals should not be directly compare with previous years' reports.

\*\*\* 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 2013.

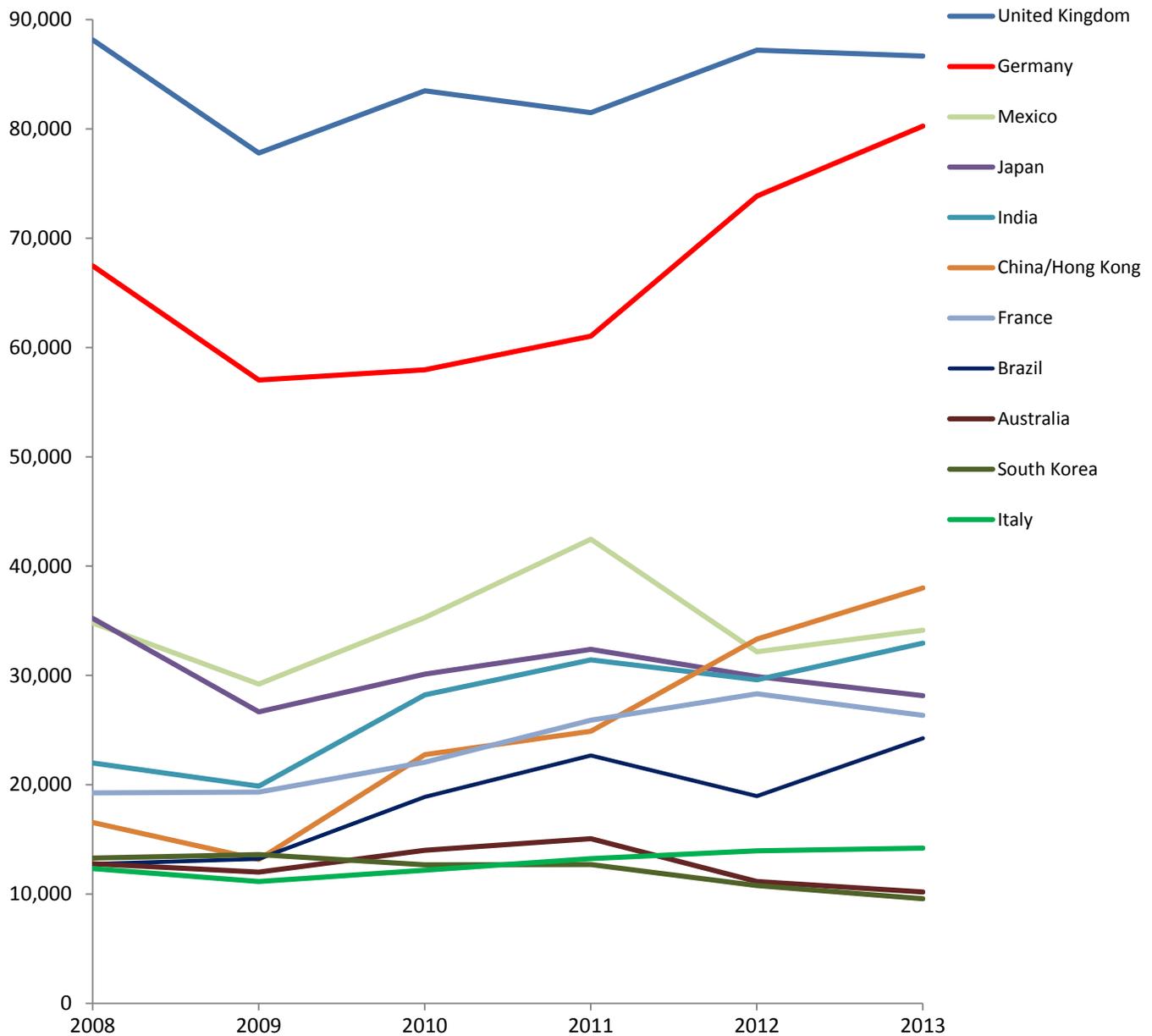
- Canada ranks #1 in terms of volume of international visitors to North Carolina, while the United Kingdom ranks #1 in terms of overseas visitation to the state with more than 86,000 visitors.
- Germany is gaining ground on the UK in terms of visitor volume. It ranks 3<sup>rd</sup> in terms of overall international visitation and 2<sup>nd</sup> in overseas visitation. The number of German visitors to North Carolina increased nearly nine percent in 2013 and their spending increased four percent from 2012.
- In terms of total spending in North Carolina, China/Hong Kong ranks third with an estimated \$28 million in total spending, behind Canadians with more than \$126 million and the UK with more than \$32 million. There are half as many Chinese visitors to North Carolina as German visitors, yet they spend twelve percent more than German visitors.
- Chinese visitors also have the highest per person spending average at \$742, followed by visitors from Switzerland (\$579) and Japan (\$528).

**Chart 1: Market Share of Top International Countries of Origin to North Carolina**  
*(Does not include Canada)*



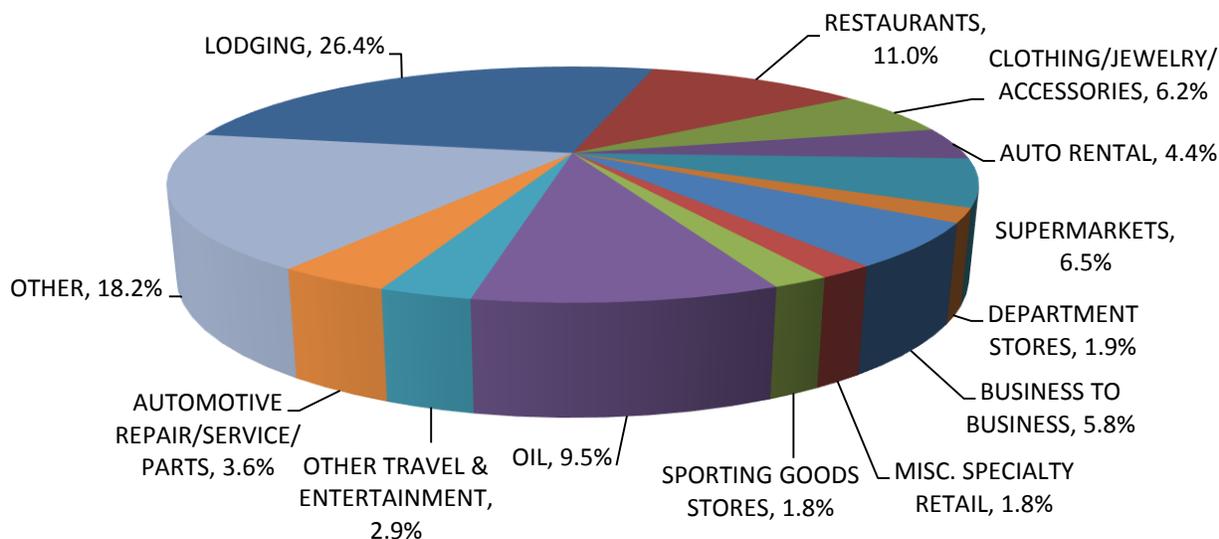
- The United Kingdom ranks #1 in terms of market share of international visitors (not including Canada) to North Carolina.
- Germany, China/Hong Kong and Mexico are the next top markets in terms of market share.
- The top 15 countries of origin, not including Canada) represent 61 percent of market share of international visitation to North Carolina.

**Chart 2: Volume Growth of Top International Markets to North Carolina 2008-2013**



*\*Does not include Canadian visitation*

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



- Canadian visitors spend the largest proportion of their travel budgets in North Carolina on lodging, retail and restaurants.
- Visitors from Canada have the highest proportion of business to business spending (5.8% of dollars spent) and also spend more in furniture stores and on gas/oil than other international visitors.

**Table 2: Canadian Spending in North Carolina**

Category	Percent of Total	Spending	% Growth from 2012
Lodging	26.4%	\$33.5M	-4.8%
Restaurants	11.0%	\$13.9M	-0.3%
Oil	9.5%	\$12.0M	-16.6%
Supermarkets	6.5%	\$8.3M	+0.1%
Clothing/Jewelry/Accessories	6.2%	\$7.9M	-2.4%
Business to Business	5.8%	\$7.4M	+7.2%
Auto Rental	4.4%	\$5.6M	-6.0%
Automotive Repair/Service/Parts, etc.	3.6%	\$4.5M	-6.8%
Other Travel & Entertainment	2.9%	\$3.6M	-14.0%
Department Stores	1.9%	\$2.4M	-3.8%
Sub Total	78.2%	\$99.1M	
<b>Total</b>	<b>100.0%</b>	<b>\$127.0M</b>	<b>-5.3%</b>

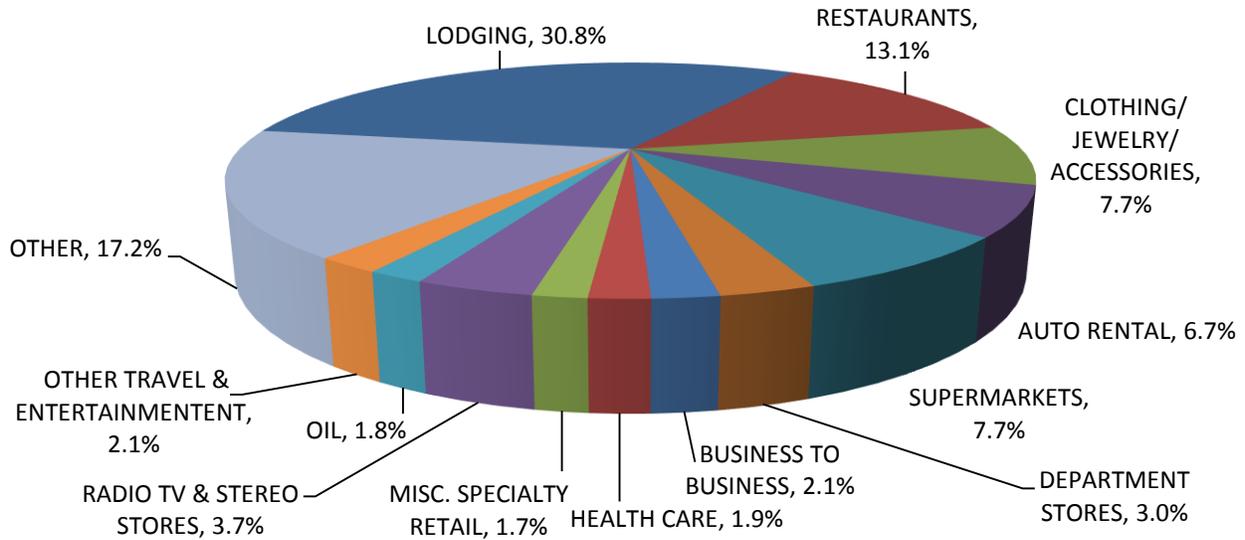
**Table 3: Canadian Visitor Volume 2012-2013**

Canadian Visitor Volume	2012	2013	% Change
	553,948	516,073	-6.8%

\*previous years' volume counts not directly comparable to 2012-present, as different methodology was implemented.

- Visitation to North Carolina by Canadians was down about seven percent from 2012.
- Canada is the top international market for North Carolina with more than five times the visitors of the next largest market of origin.

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



- In the UK market, lodging represents the largest spending category followed closely by retail in total and restaurants.
- Nearly all spending categories decreased in 2013. However “other travel and entertainment” increased more than seven percent. This category includes merchants such as duty free stores, recreation services, and public golf courses.

**Table 4: UK Spending in North Carolina**

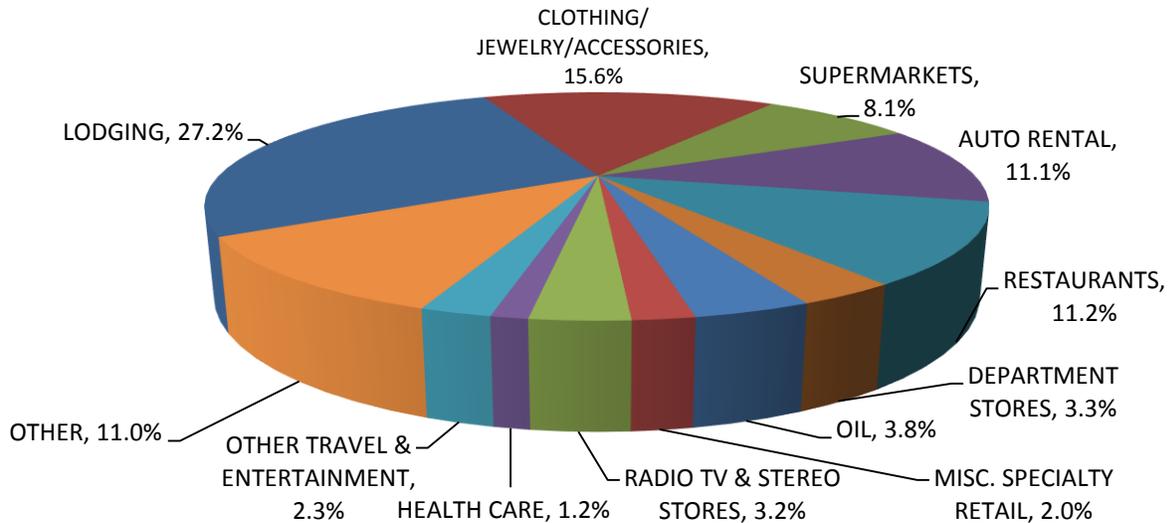
Category	Percent of Total	Spending	% Growth from 2012
Lodging	30.8%	\$10.0M	-10.5%
Restaurants	13.1%	\$4.3M	-0.1%
Clothing/Jewelry/Accessories	8.2%	\$2.7M	-1.5%
Supermarkets	7.7%	\$2.5M	-8.6%
Auto Rental	6.7%	\$2.2M	-14.4%
Radio/TV/Stereo Stores	3.7%	\$1.2M	-18.3%
Department Stores	3.0%	\$988,950	-7.2%
Other Travel & Entertainment	2.1%	\$695,412	+7.6%
Health Care	1.9%	\$607,928	-18.5%
Oil	1.8%	\$597,008	-16.6%
Sub Total	79.0%	\$25.7M	
<b>Total</b>	<b>100.0%</b>	<b>\$32.6M</b>	<b>-6.5%</b>

**Table 5: UK Visitor Volume 2008-2013**

UK Visitor Volume	2008	2009	2010	2011	2012	2013
	88,138	77,788	81,497	81,497	87,203	86,662
		-11.7%	+7.3%	-2.4%	+7.0%	-0.6%

- Visitation growth to North Carolina by UK visitors was just less than flat from 2012, but is still six percent higher than 2011.
- The UK remains the top international market for North Carolina behind Canada and the top overseas market.

**Chart 5: 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 any other country. Fifteen percent of German spending in NC is in car rental and oil/gas expenditures. German visitor spending on auto rentals increased nearly twenty-four percent from 2012.
- Travel spending in restaurants (+13.5%) by German visitors increased in 2013, as did spending in supermarkets (+3.3%).

**Table 6: German Spending in North Carolina**

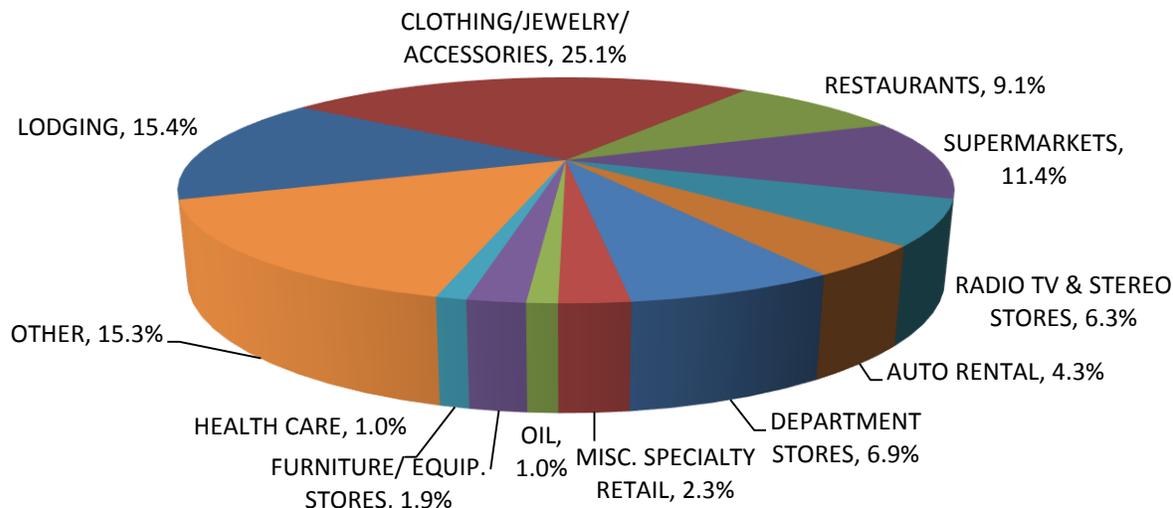
Category	Percent of Total	Spending	% Growth from 2012
Lodging	27.2%	\$6.9M	-0.9%
Clothing/Jewelry/Accessories	15.6%	\$3.9M	+2.8%
Restaurants	11.2%	\$2.8M	+13.5%
Auto Rental	11.1%	\$2.8M	+23.7%
Supermarkets	8.1%	\$2.0M	+3.3%
Oil	3.8%	\$950,010	-0.4%
Department Stores	3.3%	\$826,089	+10.9%
Radio/TV/Stereo Stores	3.2%	\$800,254	+7.1%
Other Travel & Entertainment	2.3%	\$585,812	+5.1%
Specialty Retail	2.0%	\$514,052	+2.4%
Sub Total	87.8%	\$22.2M	
<b>Total</b>	<b>100.0%</b>	<b>\$25.3M</b>	<b>+4.2%</b>

**Table 7: German Visitor Volume 2008-2013**

German Visitor Volume	2008	2009	2010	2011	2012	2013
	67,471	57,031	57,951	61,053	73,847	80,261
		-15.5%	+1.6%	+5.4%	+21.0%	+8.7%

- German visitation increased nearly nine percent in 2013 to a new record level.
- Germany remains #3 in international visitation and #2 in terms of overseas visitation to North Carolina.

**Chart 6: Spending by Merchant Category for the Chinese/Hong Kong Market in North Carolina**



- Chinese visitors to North Carolina spend one-fourth of their total spending on clothing/jewelry/accessories, the largest proportion of any other top market, and more than they spend on lodging. They spend over half (54%) of their total spending in retail in general.
- Chinese visitors spend less than average in restaurants and auto rentals/oil when compared to other countries.

**Table 8: Chinese/Hong Kong Spending in North Carolina**

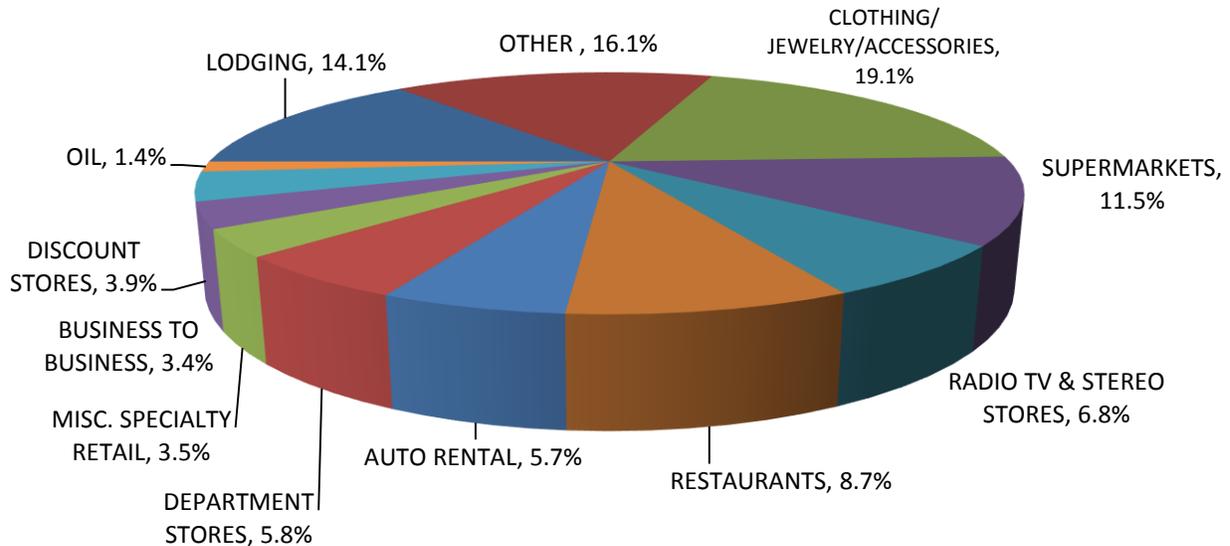
Category	Percent of Total	Spending	% Growth from 2012
Clothing/Jewelry/Accessories	25.1%	\$7.1M	+7.4%
Lodging	15.4%	\$4.3M	-19.8%
Supermarkets	11.4%	\$3.2M	+33.9%
Restaurants	9.1%	\$2.6M	+19.9%
Department Stores	6.9%	\$1.9M	+23.4%
Radio TV & Stereo Stores	6.3%	\$1.8M	-15.5%
Auto Rental	4.3%	\$1.2M	+10.6%
Specialty Retail	2.3%	\$654,311	+19.6%
Health Care	1.0%	\$295,931	+29.0%
Oil	1.0%	\$272,024	-6.8%
Sub Total	82.8%	\$23.3	
<b>Total</b>	<b>100.0%</b>	<b>\$28.2</b>	<b>+7.4%</b>

**Table 9: Chinese/Hong Kong Visitor Volume 2008-2013**

Chinese/Hong Kong Visitor Volume	2008	2009	2010	2011	2012	2013
	16,530	13,161	22,745	24,899	33,310	38,014
		-20.4%	+72.8%	+9.5%	+8.7%	+14.1%

- Visitation to North Carolina by Chinese visitors continued its growth from 2012 to 2013 (+14%). China is ranked #4 in terms of international visitation to North Carolina, and #3 in overseas visitation.
- While volume of Chinese visitors increased, spending in lodging decreased. This may indicate a shorter length of stay by Chinese visitors. Spending in most other categories increased.

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



- Mexican visitors spend a lower than average proportion of their total spending on lodging than visitors from other countries, just fourteen percent of their total spending in the state.
- Visitors to North Carolina from Mexico spend a greater than average proportion of their trip spending on retail, clothing/jewelry/accessories in particular. Half (50.6%) of their spending is in retail.

**Table 10: Mexican Spending in North Carolina**

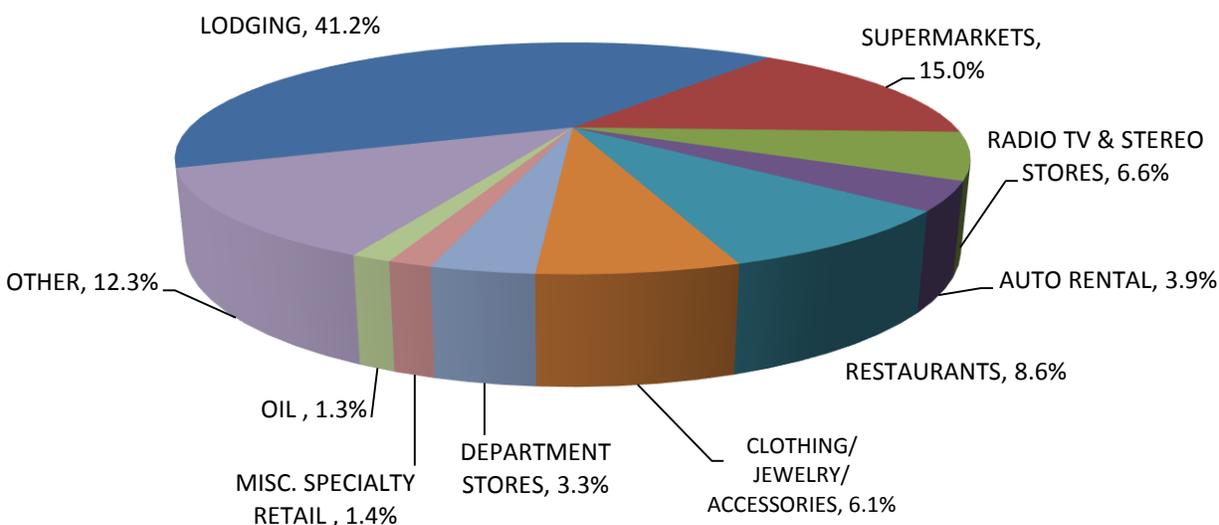
Category	Percent of Total	Spending	% Growth from 2012
Clothing/Jewelry/Accessories	19.1%	\$2.5M	+5.1%
Lodging	14.1%	\$1.9M	-10.7%
Supermarkets	11.5%	\$1.5M	+2.4%
Restaurants	8.7%	\$1.1M	+7.1%
Radio TV & Stereo Stores	6.8%	\$892,865	+2.3%
Department Stores	5.8%	\$771,727	+11.5%
Auto Rental	5.7%	\$751,913	-5.0%
Discount Stores	3.9%	\$512,464	+28.2%
Specialty Retail	3.5%	\$457,434	-12.5%
Business to Business	3.4%	\$442,747	+12.0%
Sub Total	82.5%	\$10.9M	
<b>Total</b>	<b>100.0%</b>	<b>\$13.2M</b>	<b>0.0%</b>

**Table 11: Mexican Visitor Volume 2008-2013**

Mexican Visitor Volume	2008	2009	2010	2011	2012	2013
	34,805	29,207	35,296	42,470	32,151	34,132
		-16.1%	+20.8%	+20.3%	-24.3%	+6.2%

- Mexican visitation to increased six percent from 2012, but still lags slightly behind 2008 levels.
- The country remains 5th in terms of international visitation to the state.

**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 (41%), second only to Japan.
- Indian visitors to North Carolina 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 allocate a greater than average proportion at supermarkets (15%).
- 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 more than six percent.

**Table 12: Indian Spending in North Carolina**

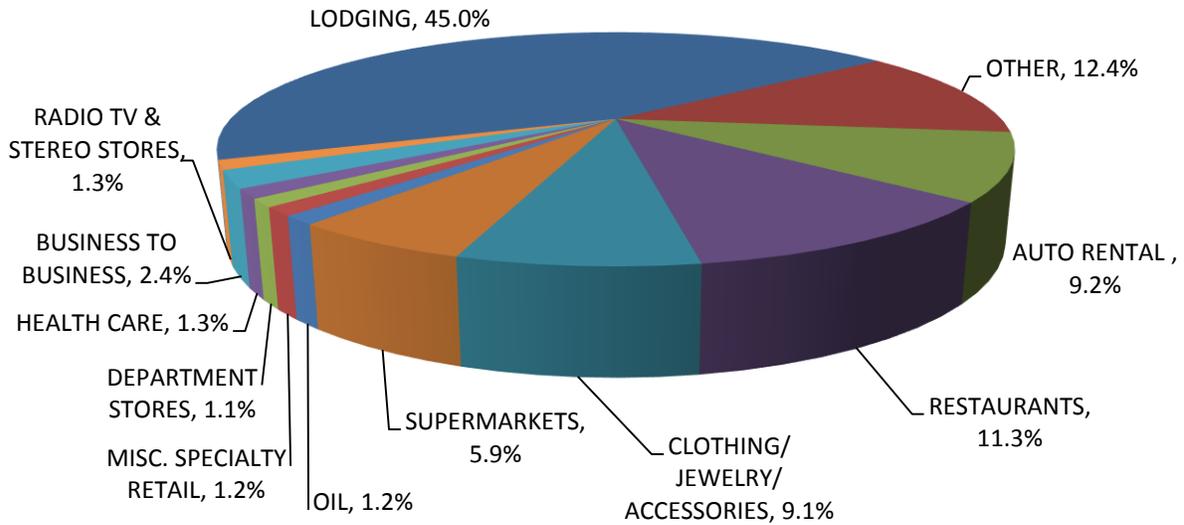
Category	Percent of Total	Spending	% Growth from 2012
Lodging	41.2%	\$5.3M	+4.8%
Supermarkets	15.0%	\$1.9M	+6.6%
Restaurants	8.6%	\$1.1M	+9.9%
Radio/TV/Stereo Stores	6.6%	\$841,516	-24.2%
Clothing/Jewelry/Accessories	6.4%	\$816,400	+6.3%
Auto Rental	3.9%	\$494,509	-13.7%
Department Stores	3.3%	\$421,553	-14.0%
Specialty Retail	1.4%	\$184,374	+6.4%
Discount Stores	1.3%	\$170,725	+0.1%
Oil	1.0%	\$134,308	-15.2%
Sub Total	88.7%	\$11.4M	
<b>Total</b>	<b>100.0%</b>	<b>\$12.8M</b>	<b>+1.2%</b>

**Table 13: Indian Visitor Volume 2008-2013**

Indian Visitor Volume	2008	2009	2010	2011	2012	2013
	21,993	19,868 -10.5%	28,216 +42.0%	31,424 +11.4%	29,599 -5.8%	32,941 +11.3%

- Indian visitation to North Carolina increased eleven percent in 2013 and reached a new record volume.
- India ranks #6 in terms of international visitation and #4 in overseas visitation to North Carolina.

**Chart 9: 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 any other country of origin to North Carolina, but the smallest proportion on retail in general (20.6%).
- Japanese visitors also allocate a higher than average proportion of spending on restaurants than other countries of origin. The proportion has increased as well; from nine percent in 2008 to more than eleven percent in 2013.

**Table 14: Japanese Spending in North Carolina**

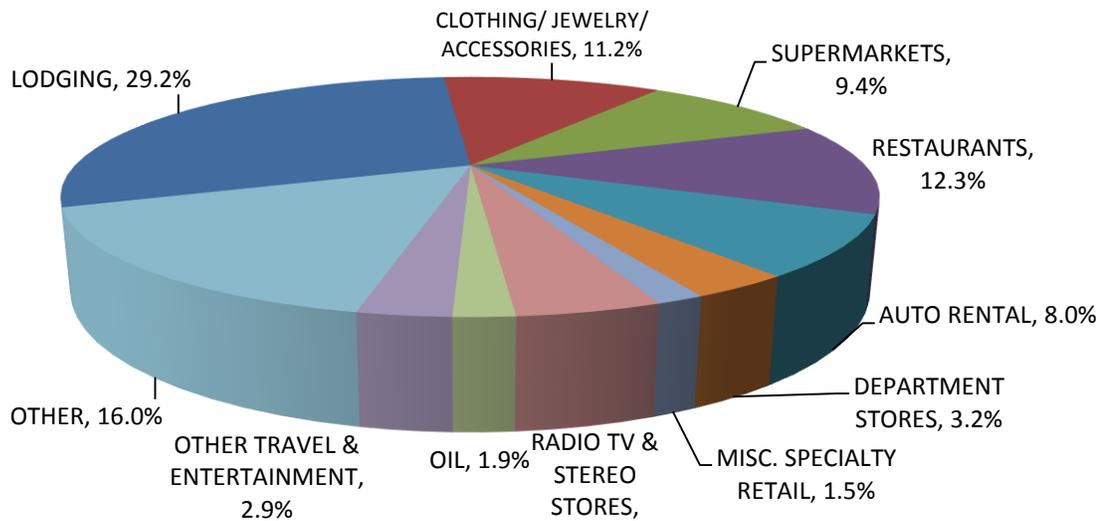
Category	Percent of Total	Spending	% Growth from 2012
Lodging	45.0%	\$6.7M	-9.2%
Restaurants	11.3%	\$1.7M	-5.1%
Auto Rental	9.2%	\$1.4M	-20.1%
Clothing/Jewelry Stores	7.7%	\$1.1M	-29.4%
Supermarkets	5.9%	\$881,903	-29.7%
Business to Business	2.4%	\$356,586	-35.3%
Radio TV & Stereo Stores	1.3%	\$198,411	-47.6%
Health Care	1.3%	\$189,973	-36.7%
Department Stores	1.1%	\$169,553	-39.1%
Sub Total	85.2%	\$12.7M	
<b>Total</b>	<b>100.0%</b>	<b>\$14.9M</b>	<b>-16.9%</b>

**Table 15: Japanese Visitor Volume 2008-2013**

Japanese Visitor Volume	2008	2009	2010	2011	2012	2013
	35,227	26,679	30,111	32,383	29,902	28,150
		-24.3%	+12.9%	+7.5%	-7.7%	-5.9%

- Visitation from Japanese travelers decreased six percent from 2012 to below 2010 levels.
- Japan ranks #7 in terms of international visitation and #5 in overseas 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 most Asian or South American markets.
- French spending in supermarkets grew nearly sixteen percent and spending on auto rentals increased nearly thirteen percent in 2013.

**Table 14: French Spending in North Carolina**

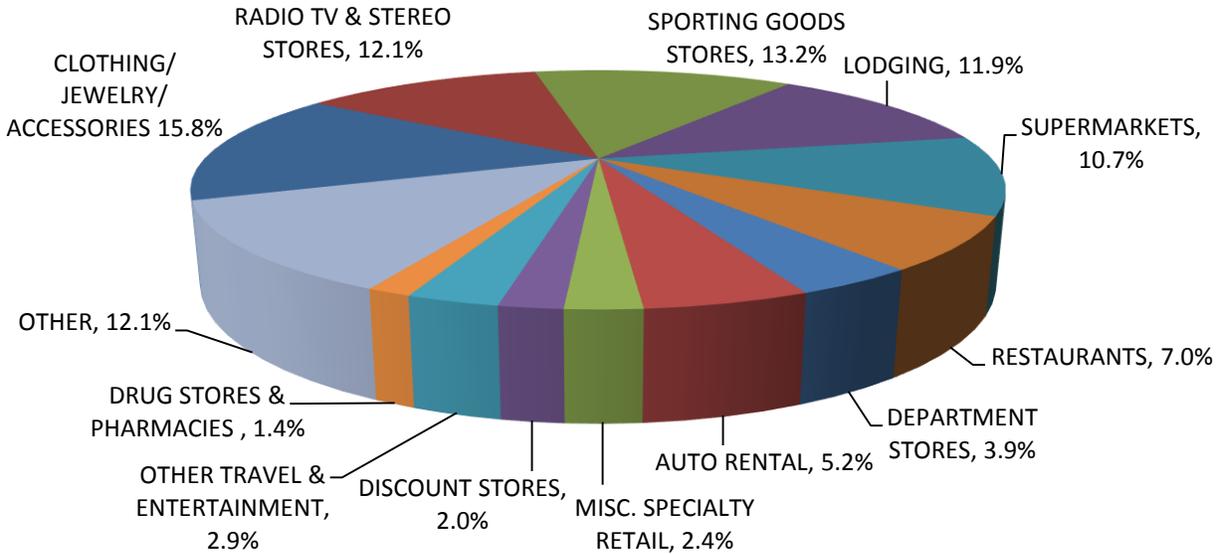
Category	Percent of Total	Spending	% Growth from 2012
Lodging	29.2%	\$2.8M	-8.2%
Restaurants	12.3%	\$1.2M	+1.0%
Clothing/Jewelry Stores	11.1%	\$1.1M	-4.0%
Supermarkets	9.4%	\$897,588	+16.2%
Auto Rental	8.0%	\$764,515	+12.8%
Radio TV & Stereo Stores	4.5%	\$427,840	-11.0%
Department Stores	3.2%	\$306,577	+7.8%
Other Travel & Entertainment	2.9%	\$279,248	+2.0%
Oil	1.9%	\$178,262	-14.5%
Miscellaneous Specialty Stores	1.5%	\$145,933	-27.6%
Sub Total	84.0%	\$8.0M	
<b>Total</b>	<b>100.0%</b>	<b>\$9.5M</b>	<b>-2.8%</b>

**Table 15: French Visitor Volume 2008-2013**

French Visitor Volume	2008	2009	2010	2011	2012	2013
	19,262	19,327 +0.3%	22,072 +14.2%	25,913 +17.4%	28,326 +9.3%	26,350 -7.0%

- While French visitation decreased somewhat in 2013, at more than 26,000 visitors it was the second highest volume on record. France ranks #8 in terms of international visitation to the state.
- While volume and total spending decreased, per person French spending increased more than four percent from 2012 to 2013.

**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 (57%) than visitors from other countries of origin with the exception of Venezuela. They allocate the largest proportion of spending to radio, TV and stereo stores (12%) and sporting goods stores (13%) than any other top country.
- Only twelve percent of spending by Brazilian visitors 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**

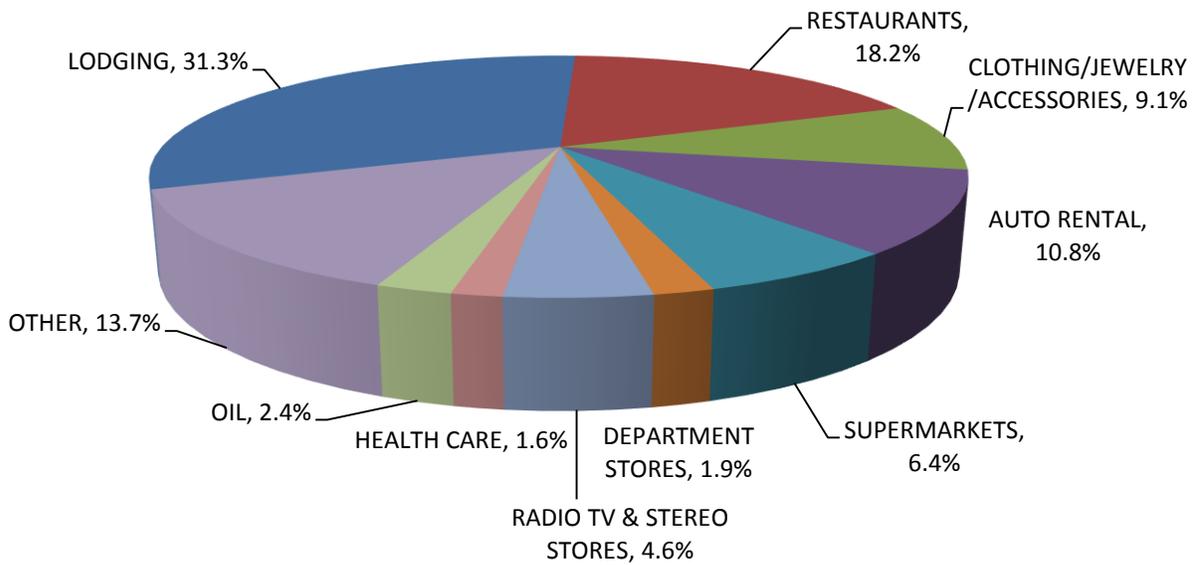
Category	Percent of Total	Spending	% Growth from 2012
Clothing/Jewelry Stores	15.2%	\$1.6M	+1.4%
Sporting Goods Stores	13.2%	\$1.4M	+10.6%
Radio TV & Stereo Stores	12.1%	\$1.3M	-1.6%
Lodging	11.9%	\$1.3M	+1.5%
Supermarkets	10.7%	\$1.1M	+34.2%
Restaurants	7.0%	\$748,624	+9.6%
Auto Rental	5.2%	\$556,414	+15.1%
Department Stores	3.9%	\$413,303	-10.9%
Miscellaneous Specialty Retail	2.4%	\$258,781	+3.8%
Sub Total	81.6%	\$8.7M	
<b>Total</b>	<b>100.0%</b>	<b>\$10.7M</b>	<b>+5.4%</b>

**Table 17: Brazilian Visitor Volume 2008-2013**

Brazilian Visitor Volume	2008	2009	2010	2011	2012	2013
	12,745	13,212	18,883	22,665	18,960	24,262
		+3.7%	+42.9%	+20.0%	-16.3%	+28.0%

- Following a drop in visitation in 2012, Brazil visitor volume increased twenty-eight percent in 2013.
- The country ranks #9 in terms of international visitation 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 (18%).
- Visitors from Italy spend a smaller than average proportion of their total spending retail in general (25%), but a greater than average proportion on auto rental/oil (13%).

**Table 18: Italian Spending in North Carolina**

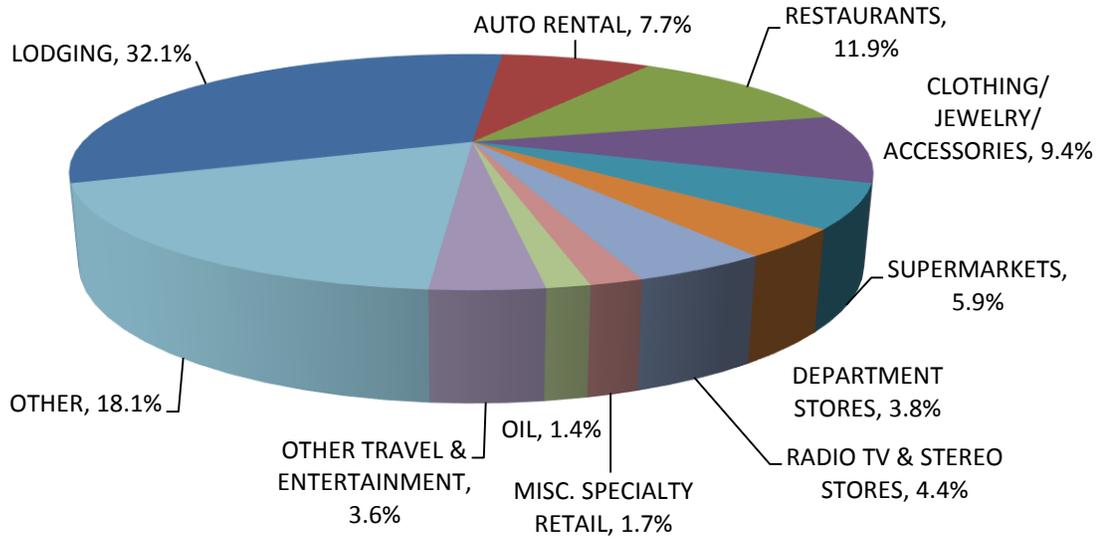
Category	Percent of Total	Spending	% Growth from 2012
Lodging	31.3%	\$2.0M	-3.3%
Restaurants	18.2%	\$1.2M	+15.0%
Auto Rental	10.8%	\$687,394	+5.8%
Clothing/Jewelry Stores	9.1%	\$578,387	+7.9%
Supermarkets	6.4%	\$403,374	+11.4%
Radio TV & Stereo Stores	4.6%	\$289,365	+30.4%
Oil	2.4%	\$151,053	-3.3%
Department Stores	1.9%	\$121,323	-7.7%
Health Care	1.6%	\$104,069	-28.6%
Sub Total	86.3%	\$5.5M	
<b>Total</b>	<b>100.0%</b>	<b>\$6.4M</b>	<b>+5.6%</b>

**Table 19: Italian Visitor Volume 2008-2013**

Italian Visitor Volume	2008	2009	2010	2011	2012	2013					
	12,316	11,152	-9.5%	12,177	+9.2%	13,234	+8.7%	13,945	+5.4%	14,196	+1.8%

- Italy, as a country of origin market, experienced a fourth consecutive year of positive growth in terms of visitor volume.
- Italy ranks 10 (same rank as 2012) in terms of North Carolina’s international markets.

**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 (32%), similar to the proportion spent by visitors from Italy and the UK.
- Visitors from Ireland also allocate a higher than average spending to auto rentals and restaurants.

**Table 28: Irish Spending in North Carolina**

Category	Percent of Total	Spending	% Growth from 2012
Lodging	32.1%	\$1.5M	+5.9%
Restaurants	11.9%	\$574,943	+21.7%
Clothing/Jewelry Stores	9.4%	\$455,035	+6.1%
Auto Rental	7.7%	\$373,100	+38.3%
Supermarkets	5.9%	\$286,400	+19.6%
Radio TV & Stereo Stores	4.4%	\$209,945	-4.7%
Department Stores	3.8%	\$182,799	+5.8%
Other Travel & Entertainment	3.6%	\$172,107	+119.0%
Miscellaneous Specialty Retail	1.7%	\$83,241	-1.9%
Oil	1.4%	\$67,994	-1.3%
Furniture/Equipment Stores	1.2%	\$57,338	-32.7%
Sub Total	83.1%	\$4.0M	
<b>Total</b>	<b>100.0%</b>	<b>\$4.8M</b>	<b>+12.9%</b>

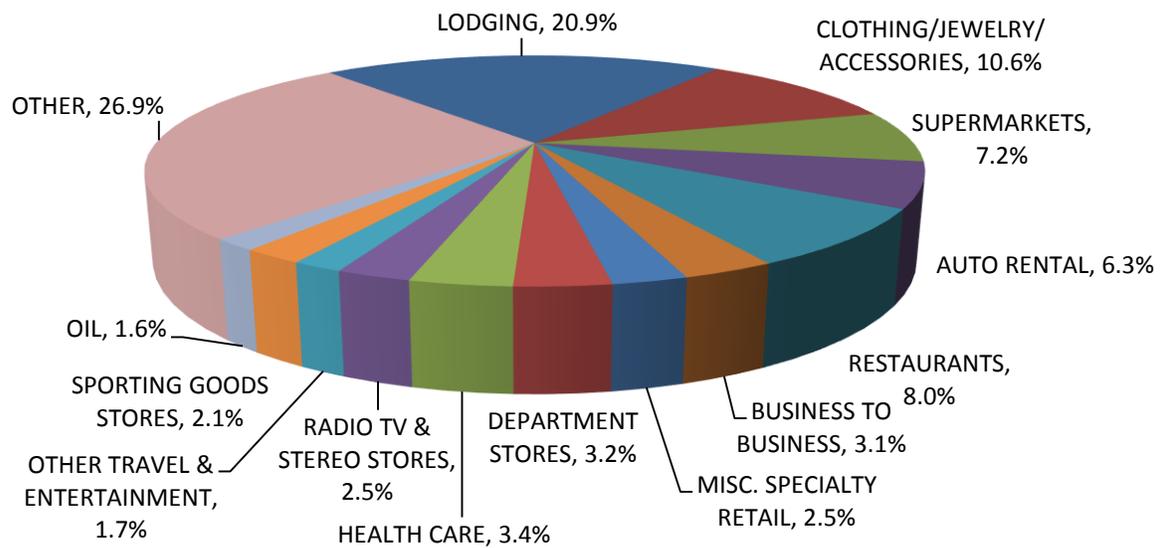
**Table 29: Irish Visitor Volume 2008-2013**

Irish Visitor Volume	2008	2009	2010	2011	2012	2013
	8,253	6,240 -24.4%	6,220 -0.3%	8,243 +32.5%	8,693 +5.5%	11,699 +34.6%

- Ireland saw great growth again in 2013 in terms of visitors to North Carolina and set a new record with more than 11,000 visitors.
- The country ranks #11 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 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, but a great proportion than visitors from China or South Korea.
- Visitors from Australia spend a larger than average proportion of their total spending in retail in general. More than forty percent (41.5%) of their total spending is in retail.

**Table 20: Australian Spending in North Carolina**

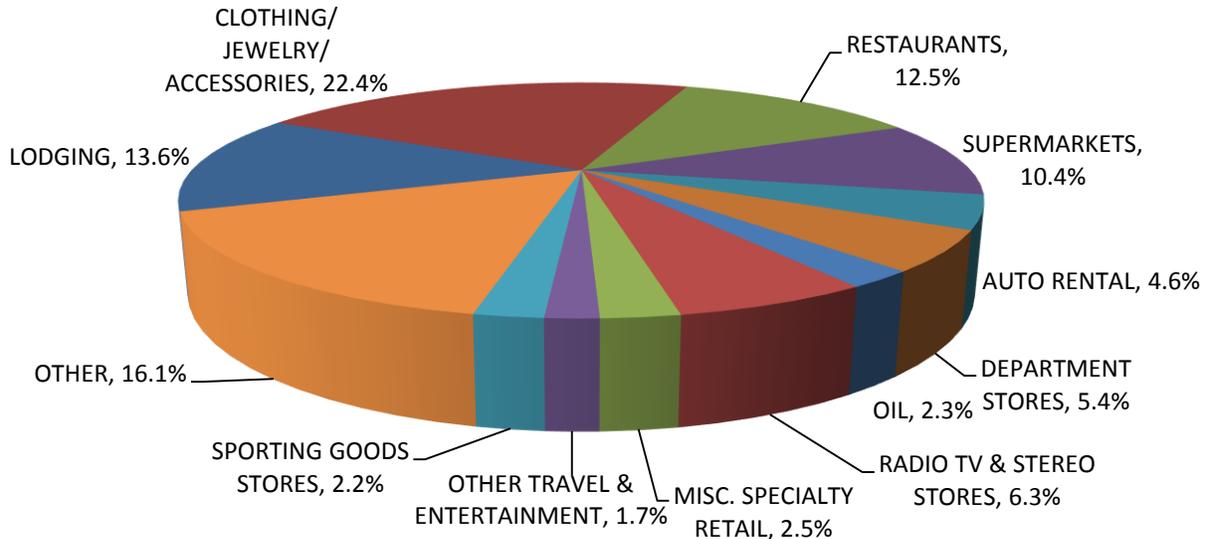
Category	Percent of Total	Spending	% Growth from 2012
Lodging	20.9%	\$888,311	-8.1%
Clothing/Jewelry Stores	10.6%	\$449,660	-15.5%
Restaurants	8.0%	\$339,548	-4.7%
Supermarkets	7.2%	\$306,193	-17.2%
Auto Rental	6.3%	\$265,852	+18.9%
Department Stores	3.2%	\$136,790	-23.5%
Health Care	3.4%	\$144,680	+60.7%
Business to Business	3.1%	\$130,559	-7.7%
Miscellaneous Specialty Retail	2.5%	\$108,102	-24.5%
Radio TV & Stereo Stores	2.5%	\$105,565	-25.0%
Sub Total	67.8%	\$2.9M	
<b>Total</b>	<b>100.0%</b>	<b>\$4.2M</b>	<b>-10.3%</b>

**Table 21: Australian Visitor Volume 2008-2013**

Australian Visitor Volume	2008	2009	2010	2011	2012	2013
	12,769	12,018 -5.9%	13,997 +16.5%	15,072 +7.7%	11,136 -26.1%	10,172 -8.7%

- Australian visitation dropped again in 2013, and is the 12<sup>th</sup> ranked origin market for NC international visitation.

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



- Swedish visitors to the state spend a smaller than average proportion of their total spending on lodging (13.6%).
- These visitors, however, spend more on retail in general (50%), and on clothing/jewelry/accessories in particular (22%).

**Table 22: Swedish Spending in North Carolina**

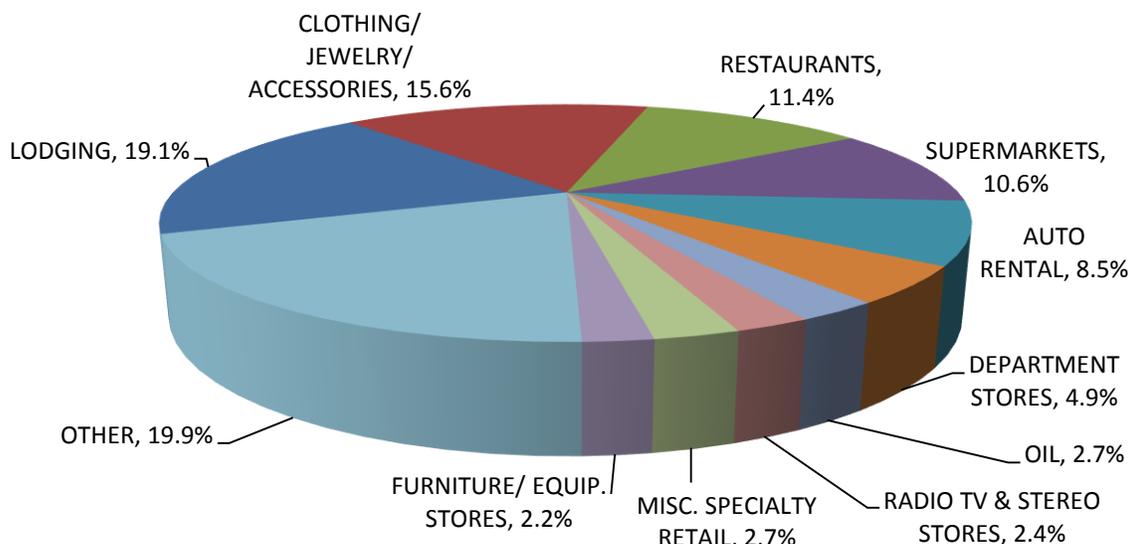
Category	Percent of Total	Spending	% Growth from 2012
Clothing/Jewelry Stores	22.4%	\$847,799	-4.8%
Lodging	13.6%	\$515,679	-17.4%
Supermarkets	10.4%	\$392,677	-20.8%
Restaurants	12.5%	\$471,869	-2.0%
Radio TV & Stereo Stores	6.3%	\$239,285	-22.9%
Department Stores	5.4%	\$202,913	-10.4%
Auto Rental	4.6%	\$173,895	-14.7%
Oil	2.3%	\$85,723	-19.3%
Miscellaneous Specialty Retail	2.5%	\$93,611	-8.8%
Other Travel & Entertainment	1.7%	\$65,487	-23.8%
Sporting Goods Stores	2.2%	\$81,917	+13.1%
Sub Total	83.8%	\$3.2M	
<b>Total</b>	<b>100.0%</b>	<b>\$3.8M</b>	<b>-11.9%</b>

**Table 23: Swedish Visitor Volume 2008-2013**

Swedish Visitor Volume	2008	2009	2010	2011	2012	2013
	10,625	7,555 -28.9%	8,302 +9.9%	9,289 +11.9%	10,857 +16.9%	9,870 -9.1%

- After three years of growth in volume, visitation from Sweden decreased nine percent in 2013, but the volume remains above 2011 levels.
- Sweden is #13 terms of international visitation and #11 in overseas 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 both decreased in 2013.
- These visitors also allocate a larger than average proportion of their travel budgets on retail in general (41%).

**Table 24: South Korean Spending in North Carolina**

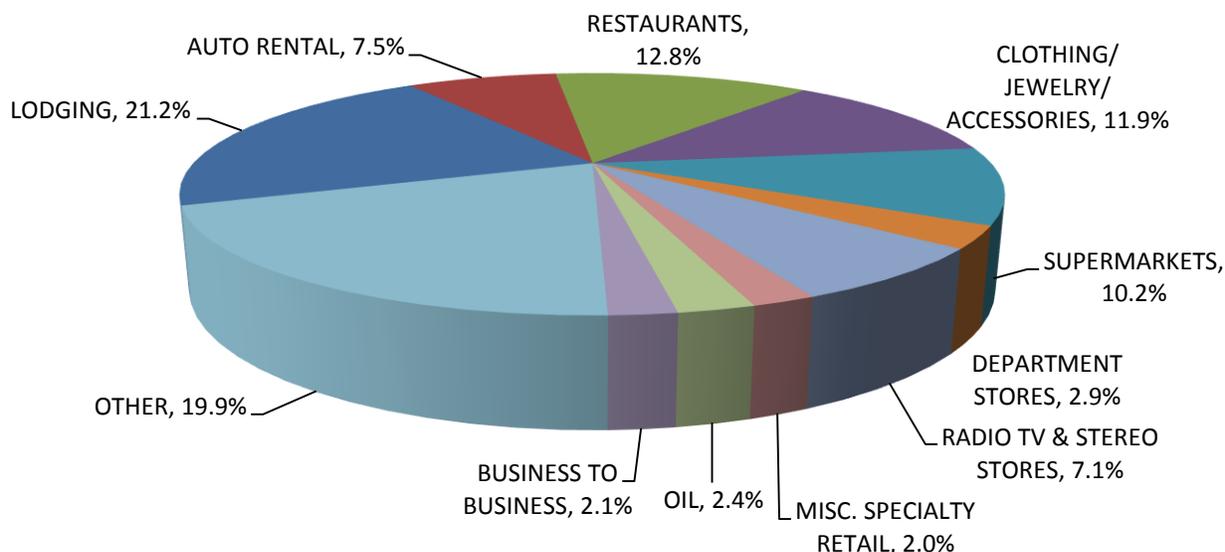
Category	Percent of Total	Spending	% Growth from 2012
Lodging	19.1%	\$840,149	-21.6%
Clothing/Jewelry Stores	15.6%	\$687,705	-14.8%
Restaurants	11.4%	\$501,591	-17.6%
Supermarkets	10.6%	\$466,799	-9.0%
Auto Rental	8.5%	\$376,037	-21.9%
Department Stores	4.9%	\$216,033	-17.6%
Oil	2.7%	\$119,988	-28.9%
Miscellaneous Specialty Retail	2.7%	\$118,613	-17.2%
Radio TV & Stereo Stores	2.4%	\$103,880	-30.6%
Furniture/Equipment Stores	2.2%	\$96,925	+10.1%
Sub Total	80.1%	\$3.5M	
<b>Total</b>	<b>100.0%</b>	<b>\$4.4M</b>	<b>-17.5%</b>

**Table 25: South Korean Visitor Volume 2008-2013**

South Korean Visitor Volume	2008	2009	2010	2011	2012	2013
	13,276	13,606 +2.5%	12,666 -6.9%	12,690 +0.2%	10,781 -15.0%	9,562 -11.3%

- Visitation from South Korea fell eleven percent in 2013 and slipped in ranking from 13 to 14 in terms of visitor volume.

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



- Spanish visitors to North Carolina spend a smaller proportion of their total spending on lodging (21%) than other international visitors, but spent a larger proportion of their travel budgets on restaurants (12.8%) and supermarkets.
- Visitors from Spain also allocate a slightly larger proportion of spending to auto rental (7.5%) than other countries of origin.

**Table 26: Spanish Spending in North Carolina**

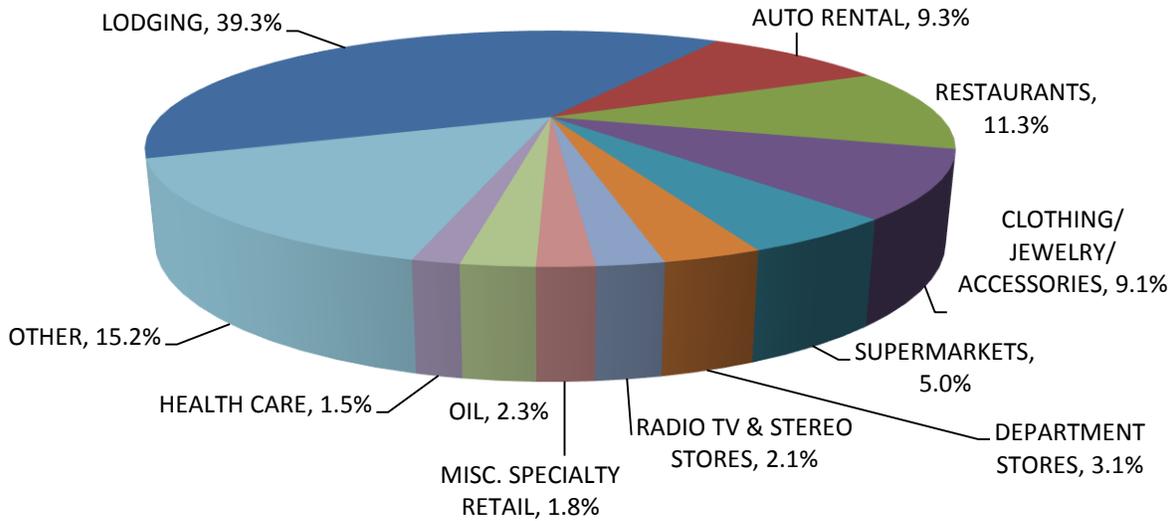
Category	Percent of Total	Spending	% Growth from 2012
Lodging	21.2%	\$905,537	-30.5%
Restaurants	12.8%	\$547,556	+15.3%
Clothing/Jewelry Stores	11.9%	\$509,057	-2.6%
Supermarkets	10.2%	\$436,154	+6.4%
Auto Rental	7.5%	\$320,140	+14.4%
Radio TV & Stereo Stores	7.1%	\$302,350	+32.9%
Department Stores	2.9%	\$123,789	-15.7%
Oil	2.4%	\$101,709	+0.8%
Miscellaneous Specialty Retail	2.0%	\$84,397	-7.6%
Sub Total	78.0%	\$3.3M	
<b>Total</b>	<b>100.0%</b>	<b>\$4.3M</b>	<b>-1.8%</b>

**Table 27: Spanish Visitor Volume 2008-2013**

Swiss Visitor Volume	2008	2009	2010	2011	2012	2013
	6,156	6,085	5,996	7,818	8,582	9,271
		-1.2%	-1.5%	+30.4%	+9.8%	+8.0%

- Visitation to North Carolina from Spain increased for the third straight year, and is at a record level with more than 9,000 visitors in 2013.
- Spain ranks #15 in terms of international visitation to North Carolina.

**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 (39%) and the largest proportion of any European country of origin.
- Visitors from Switzerland also allocate a larger proportion of spending to auto rental (9.3%) than other countries of origin.
- Visitors from Switzerland spend the smallest proportion of their total spending in supermarkets (5.0%) 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**

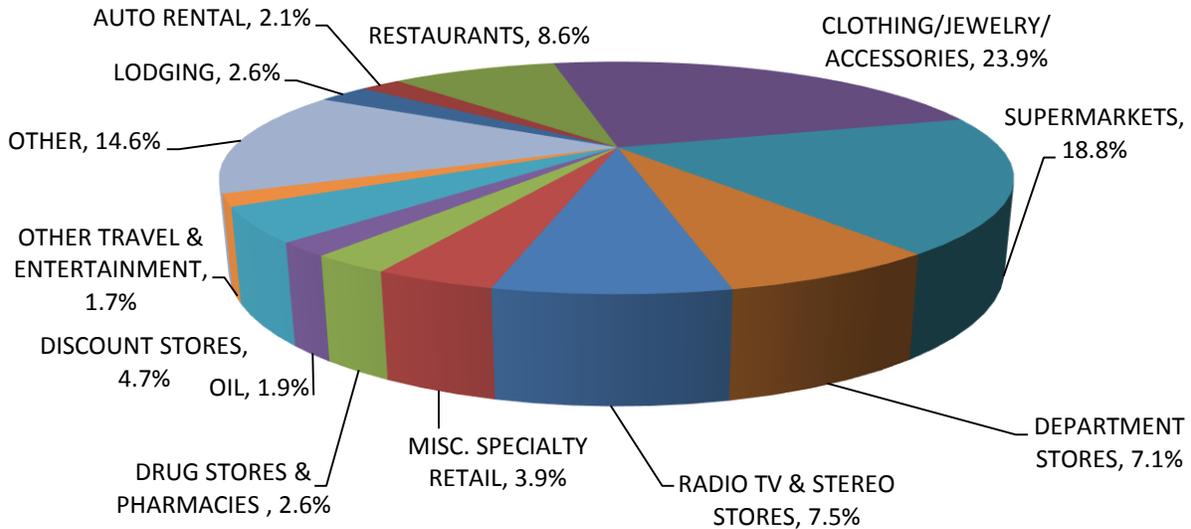
Category	Percent of Total	Spending	% Growth from 2012
Lodging	39.3%	\$1.9M	-3.0%
Restaurants	11.3%	\$534,521	-5.2%
Auto Rental	9.3%	\$439,967	-21.2%
Clothing/Jewelry Stores	9.1%	\$430,596	-27.6%
Supermarkets	5.0%	\$233,406	-16.6%
Department Stores	3.1%	\$185,253	-20.9%
Oil	2.3%	\$106,202	+7.3%
Radio TV & Stereo Stores	2.1%	\$99,110	-44.9%
Miscellaneous Specialty Retail	1.8%	\$82,967	-23.9%
Sub Total	83.3%	\$3.9M	
<b>Total</b>	<b>100.0%</b>	<b>\$4.7M</b>	<b>-13.1%</b>

**Table 27: Swiss Visitor Volume 2008-2013**

Swiss Visitor Volume	2008	2009	2010	2011	2012	2013
	8,686	7,906	8,974	9,875	8,755	8,145
		-9.0%	+13.5%	+10.0%	-11.3%	-7.0%

- Visitation to North Carolina from Switzerland decreased again in 2013, though it is still above 2009 levels.
- Switzerland ranks #16 in terms of international visitation to North Carolina.

**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 (3%) and auto rentals (2%) than any other top country of origin.
- However, Venezuelan visitors to the state spend the largest proportions of money in supermarkets (19%), and retail in general (58%) than any other top country.

**Table 30: Venezuelan Spending in North Carolina**

Category	Percent of Total	Spending	% Growth from 2012
Clothing/Jewelry Stores	23.9%	\$694,118	+25.6%
Supermarkets	18.8%	\$546,743	+32.0%
Restaurants	8.6%	\$249,549	+27.9%
Radio TV & Stereo Stores	7.5%	\$217,645	+6.9%
Department Stores	7.1%	\$205,619	+12.9%
Discount Stores	4.7%	\$135,574	+32.8%
Miscellaneous Specialty Retail	3.9%	\$113,461	+29.9%
Lodging	2.6%	\$74,232	-10.1%
Drug Stores & Pharmacies	2.6%	\$76,900	+17.2%
Auto Rental	2.1%	\$61,602	+1.6%
Oil	1.9%	\$56,021	+44.8%
Sub Total	83.7%	\$2.4M	
<b>Total</b>	<b>100.0%</b>	<b>\$2.9M</b>	<b>+25.9%</b>

**Table 31: Venezuelan Visitor Volume 2008-2013**

Venezuelan Visitor Volume	2008	2009	2010	2011	2012	2013
	7,338	5,649	4,039	4,800	4,400	5,609
		-23.0%	-28.5%	+18.8%	-8.3%	+27.5%

- Visitation to North Carolina from Venezuela increased twenty-eight percent in 2013, nearly reaching 2009 levels.
- Venezuela ranks #17 for international visitors to North Carolina.

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

**Table 32: German Speaking Europe**

Category	Percent of Total	Spending	% Growth from 2012
Lodging	30.1%	\$8.7M	-1.3%
Clothing/Jewelry Stores	14.0%	\$4.4M	-1.2%
Restaurants	11.2%	\$3.4M	+10.0%
Auto Rental	10.7%	\$3.3M	+14.8%
Supermarkets	7.3%	\$2.3M	+0.8%
Department Stores	3.2%	\$972,542	+4.6%
Radio TV & Stereo Stores	2.9%	\$899,364	-3.0%
Miscellaneous Specialty Retail	2.0%	\$597,019	-2.3%
Sub Total	81.5%	\$24.5M	
<b>Total</b>	<b>100.0%</b>	<b>\$30.0M</b>	<b>+1.0%</b>

**Table 33: German Speaking Europe Visitor Volume 2008-2013**

German Speaking Europe Visitor Volume	2008	2009	2010	2011	2012	2013
	76,157	64,937 -10.8%	66,925 +3.1%	70,928 +6.0%	82,602 +16.5%	88,406 +7.0%

## 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 2013.
- 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. Lodging estimates should be considered conservative, as pre-paid lodging is 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.