



# **2013 North Carolina Regional Travel Summary**

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

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## **2013 North Carolina Regional Travel Summary**

The North Carolina Division of Tourism, Film and Sports Development has contracted with the research company TNS for eight 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 regional report is to provide each region with research data specific to their geographic area. The report is divided into three sections: Mountain, Piedmont, and Coast. Where applicable, regional statistics are compared to statewide statistics to provide regions with information relevant to how they compare to NC travel in general. In addition, comparisons to 2012 are also offered as available. In the final section of the report, a comparison between the three regions is offered. At the end of the report, an appendix offers definitions of key travel terms.

# 2013 North Carolina Regional Travel Summary

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## 2013 Domestic Coastal Region Total Travel

### Summary

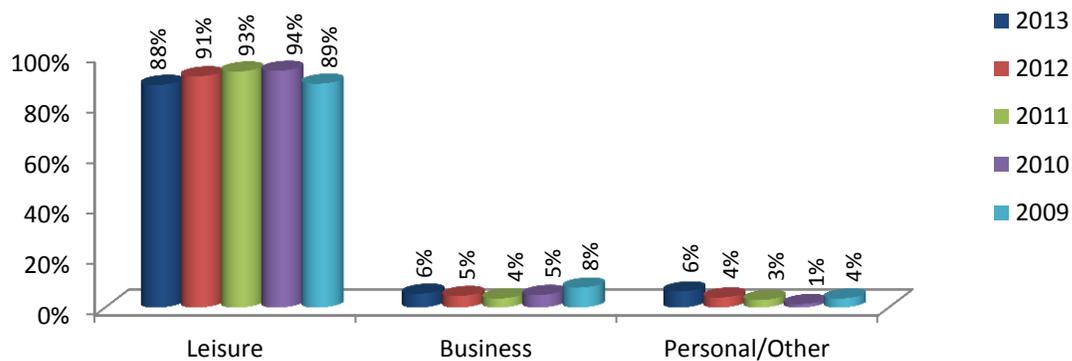
- ◆ In 2013, 22 percent of North Carolina visitors traveled to North Carolina’s Coastal Region, approximately 11.6 million person-trips. For marketing purposes, the Coastal Region is made up of twenty-eight most eastern counties of North Carolina.
- ◆ Eighty-four percent of all domestic visitors (and 88% of overnight visitors) came to the Coastal Region for pleasure purposes, while nine percent of visitors came to conduct business (includes meeting/convention). The remaining visitors indicated “other” reason for visiting the coast.
- ◆ The summer (June - August) was the most popular season for travel to North Carolina’s Coastal Region, with forty-eight percent of all 2013 coastal visitors. Spring (March-May) and fall (September - November) followed with twenty-one percent and twenty percent of coastal visitors respectively. The winter season (December-February) was the least visited with eleven percent. July was the single largest month for coastal travel with twenty-three (22.5%) percent.
- ◆ Overnight visitors to the Coastal Region spent an average of 3.3 nights in the region in 2013.
- ◆ Thirty-five percent of Coastal Region visitors stayed in a private home while thirty-two percent lodged at a hotel/motel. Nineteen percent stayed in a rental home and seven percent stayed in a rental condo. Just over eleven percent stayed in a personal second home or condo.
- ◆ The average travel party size for all Coastal Region visitors was 2.1 people. Thirty-three percent of overnight travel parties to the region included children in the party.
- ◆ Ninety-one percent of overnight travelers to the Coastal Region drove (includes personal automobile, rental, motorcycle and RV), while seven percent traveled by air.
- ◆ In 2013, the average household trip expenditure in the Coastal Region was \$786. The average household trip expenditure for overnight visitors to the Coastal Region was \$899. Daytrip parties to the Coast region spent approximately \$160 per visit.
- ◆ The top states of origin of *overnight* visitors to the Coastal Region were North Carolina (40.1%), Virginia (15.0%), Pennsylvania (6.6%), New Jersey (4.7%), Texas (4.5%), Ohio (3.3%), New York (2.8%), Florida (2.5%), South Carolina (2.4%) and West Virginia (2.3%).
- ◆ Sixty-six percent of all households that traveled to North Carolina’s Coastal Region in 2013 had a household income over \$50,000.
- ◆ In 2013, Raleigh/Durham/Fayetteville (20.4%) was the top advertising market of origin for *overnight* travelers to the Coastal Region, followed by Charlotte (7.3%), Greensboro/High Point/Winston Salem (6.2%), Norfolk-Portsmouth-Newport News (6.1%), New York (6.0%), Greenville-New Bern-Washington (5.5%), Washington DC (4.9%), Pittsburgh (4.0%) and Richmond-Petersburg, VA (4.0%).

## Coastal Region Overnight Visitor Profile

### Main Purpose of Visit

In 2013, nearly nine out of ten (88.1%) of domestic overnight visitors came to the Coastal Region for leisure purposes, which included visiting friends and relatives, outdoor recreation and entertainment/sightseeing. More than five percent of domestic overnight visitors came for general business, convention, seminar or other group meeting, while six percent traveled to the Coastal Region to conduct “other” business.

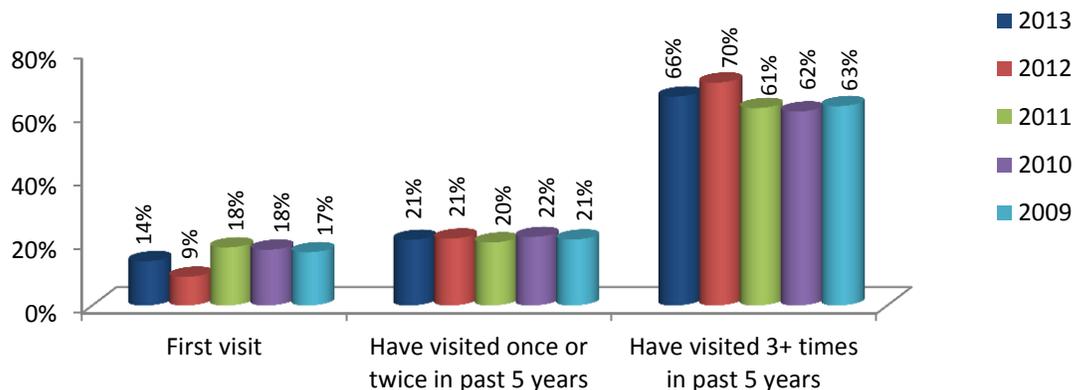
**2013 Primary Purpose of Overnight Trip to North Carolina's Coastal Region**



### First Time Visitors

The Coastal Region saw a larger proportion of first time visitors in 2013, up from 9% to 14%. The majority of overnight visitors are still repeat visitors however.

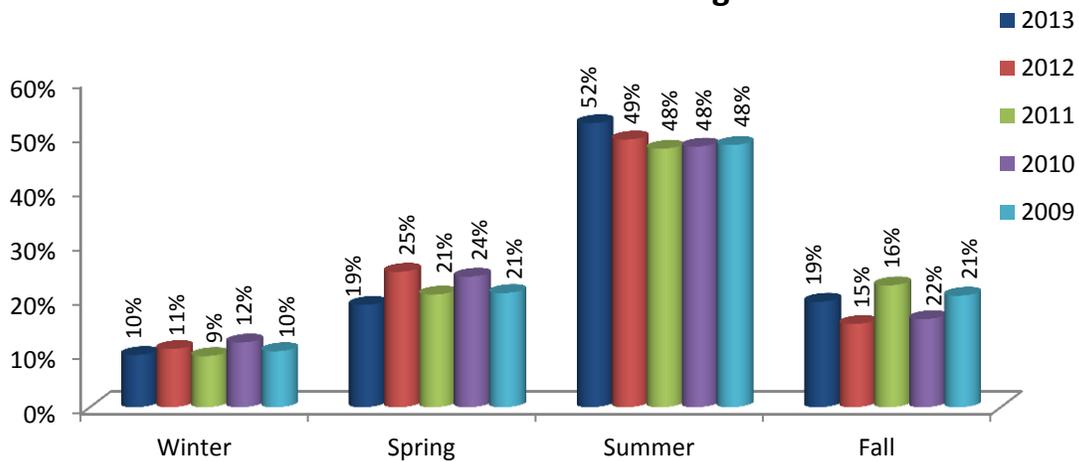
**2013 First Time vs. Repeat Visitors to North Carolina's Coastal Region**



## Travel Volume by Season

When examining visitation based on the typical seasonal schedule, the summer (June through August), with more than fifty percent, remains the most popular season of the year for overnight travel to North Carolina’s Coastal Region. In 2013, fall (September through November) visitation increased from 2012 in terms of proportion of total to nearly twenty percent. Spring (March through May) drew nineteen percent of overnight visitors and winter (December through February) fell slightly to ten percent.

**2013 Overnight Travel by Season to North Carolina's Coastal Region**



## Average Length of Stay

In 2013, an average of 3.3 nights was spent by visitors to North Carolina’s Coastal Region, up slightly from 2012. Data indicates that out-of-state visitors stay an average of 3.9 nights, while in-state visitors stay an average of 2.6 nights.

## Travel Party Size

The average travel party size for all Coastal Region overnight visitors was 2.1 people.

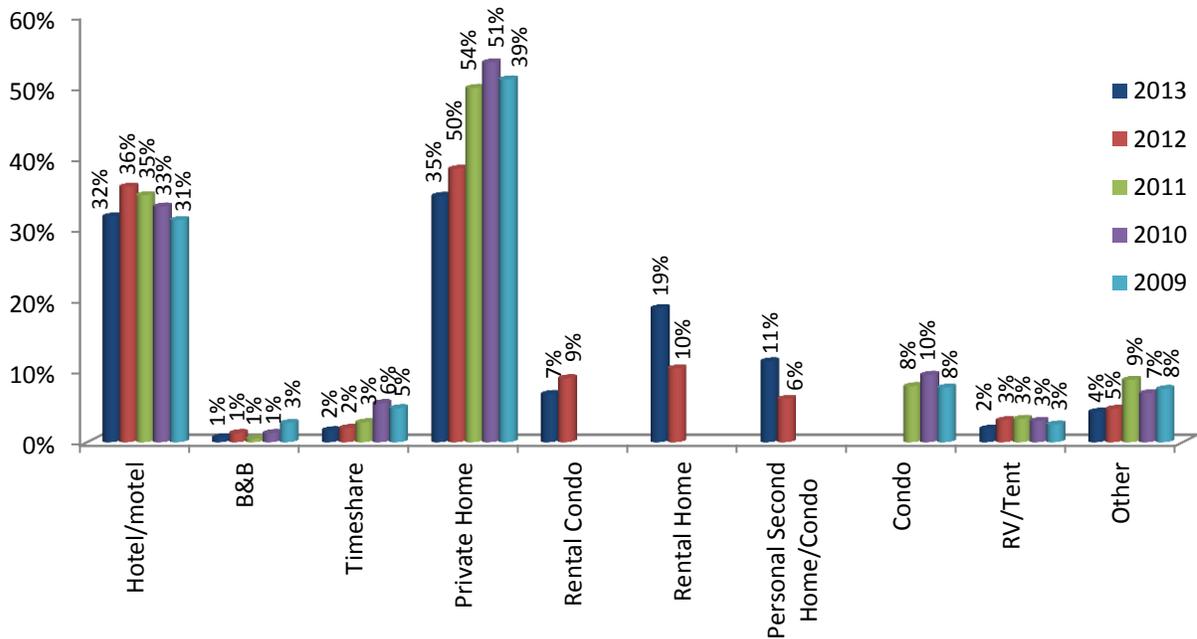
## Children on Trip

Thirty-three percent of overnight visitor parties to the Coastal Region included children. Among those who traveled with children, the average number of children on trips was 1.8.

## Lodging Used in Coastal Region

In 2013, over one-third of Coastal Region visitors stayed in a private home (35%), while nearly thirty-two percent lodged at a hotel/motel, a decrease from 2012. Note that in 2012 the lodging categories changed to better reflect the use of rental homes/condos and personal second homes/condos, therefore comparisons between lodging categories before 2012 should be made with caution.

**2013 Lodging by Overnight Visitors to North Carolina's Coastal Region**

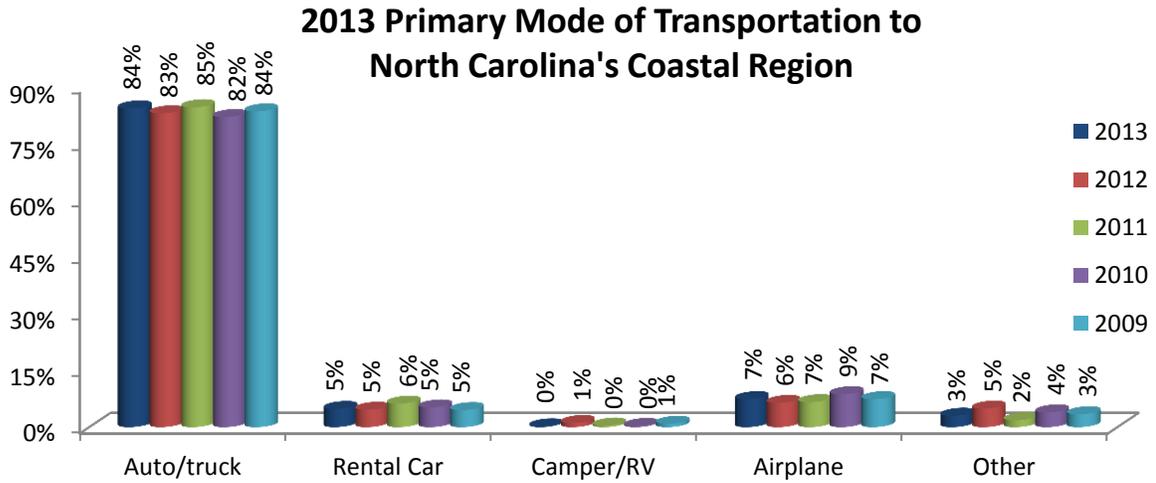


\*percentages add to more than 100% due to multiple responses

\*\*Note that categories changed in 2012 to better reflect the use of rental homes/condos and second homes

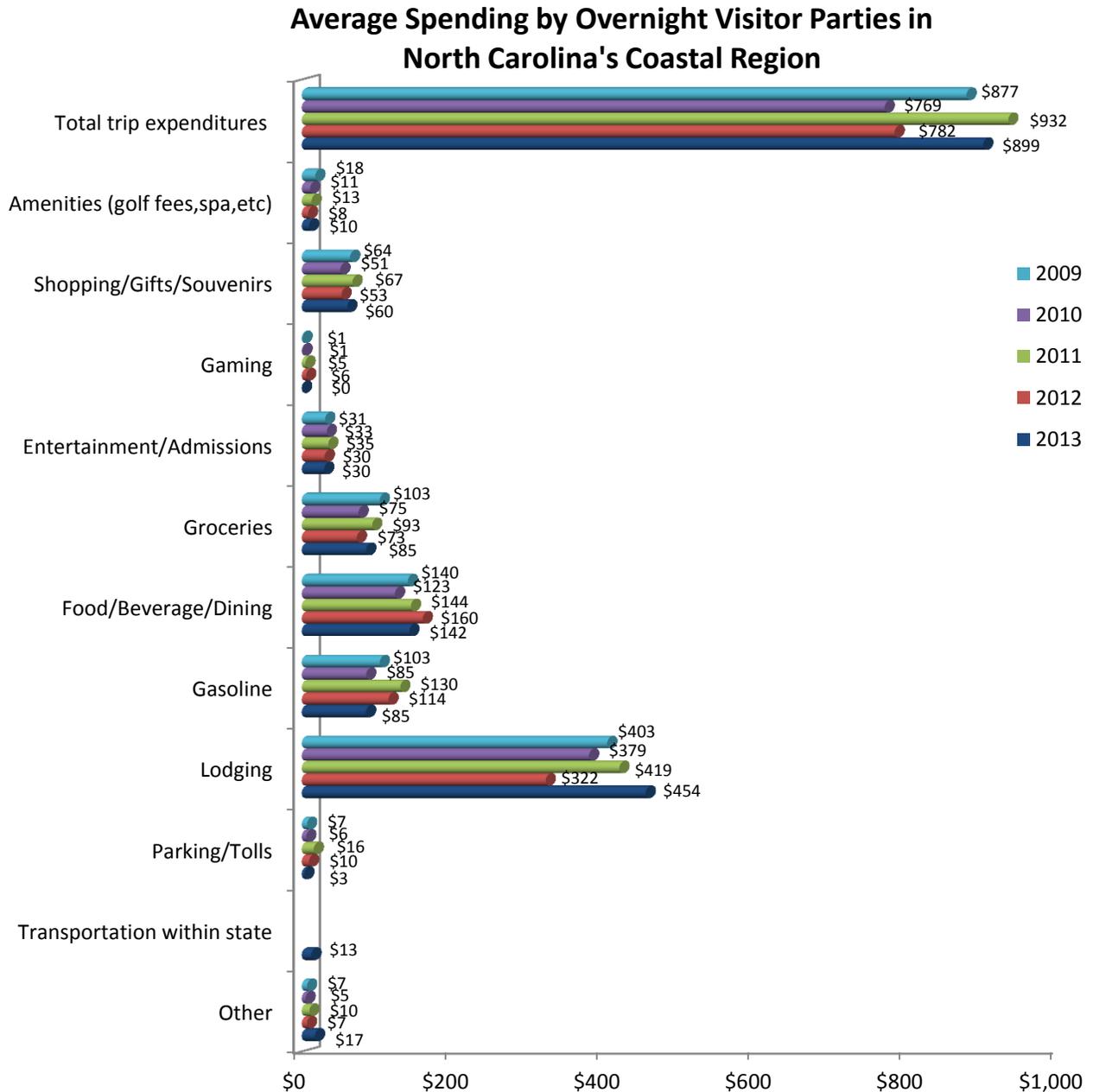
## Mode of Transportation

In 2013, the personal auto was by far the dominant form of transportation (84%) to the Coastal Region, while seven percent traveled by air, a slight increase from 2012.



## Amount Spent in Coastal Region

The average overnight visitor party spending in the Coastal Region increased more than \$100 in 2013 from 2012. Average lodging expenditures increased for than forty percent from last year. Higher rates and longer length of stay both contributed to the increase.

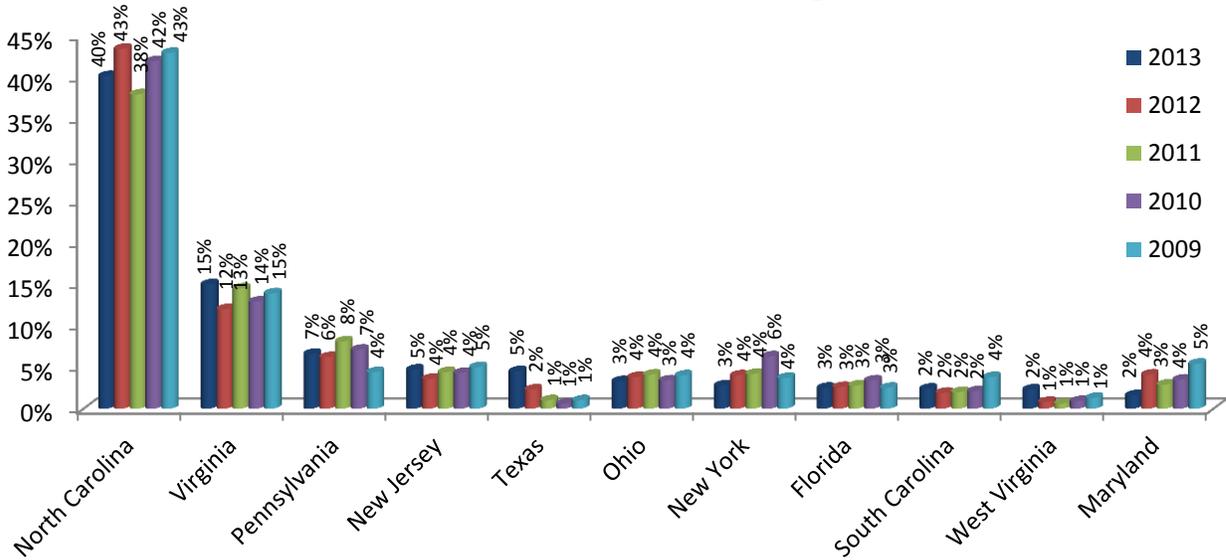


\*Transportation categories changed in 2013 to better reflect transportation to versus within the state, thus comparisons to previous years for that category are not valid. Total expenditures for years prior to 2013 have been revised to allow for accurate comparisons.

## Origin of Visitors

In 2013, the top states of origin for Coastal Region overnight visitors included North Carolina (40%), Virginia (15%), Pennsylvania (7%), New Jersey (5%) and Texas (5%). The proportion of in-state visitors decreased from 43% in 2012, while the proportion from Virginia to the coast increased from 12% in 2012 to 15% in 2013.

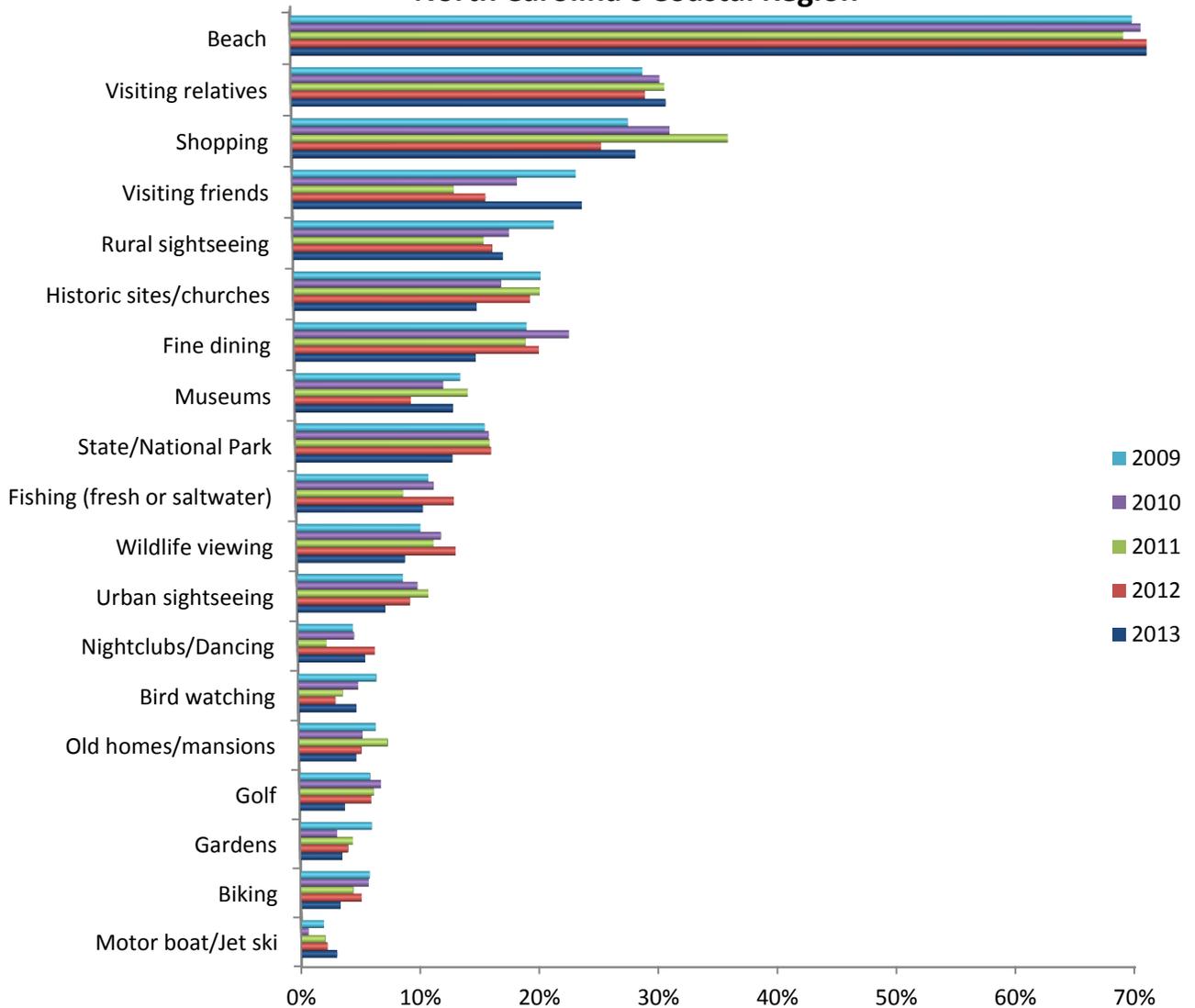
**2013 Top States of Origin of Overnight Visitors to North Carolina's Coastal Region**



## Activities

The following chart provides information on activities participated in by Coastal Region visitors. These are not indicative of purpose of trip, but a glimpse at what visitors enjoy doing while in North Carolina. More than seventy percent of the overnight visitors to the region went to a beach and nearly a third (31%) of overnight visitors spent time visiting with relatives while at the coast. Other popular activities included shopping (28%), visiting friends (24%), rural sightseeing (17%), visiting historic sites/churches (15%), fine dining (15%), and museums (13%). **\*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.**

**2013 Activities Participated in by Overnight Visitors to North Carolina's Coastal Region**



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

More than half (57%) of the North Carolina Coastal Region overnight visitor are married and twenty percent of the region's visitors are divorced, widowed or separated.

The largest proportion of North Carolina coastal region overnight visitors classifies themselves as white (89%), and five percent classify themselves as black/African American.

Two-thirds (64%) of Coastal Region overnight visitor parties have a household head with a college degree or higher. The average Coastal region visitor is 47 years old, with more than one-half (55%) being 45 years old or older.

Nearly half (47%) of the visitor parties that traveled to North Carolina's Coastal Region in 2013 had a household income \$75,000 or over. Seventeen percent had a household income of over \$125,000.

## 2013 Top Advertising Markets

In 2013, the top advertising markets sending overnight visitors to **North Carolina’s Coastal Region** were Raleigh-Durham-Fayetteville (20.4%), Charlotte (7.3%), Greensboro-Winston-Salem-High Point (6.2%), Norfolk-Portsmouth-Newport News, VA (6.1%), New York, NY (6.0%) Greenville-New Bern-Washington (5.5%), and Washington DC (4.9%). Advertising markets correspond with Nielsen’s Designated Market Areas (DMAs).

### Top Advertising Markets of Origin for *Overnight* Coastal Region Visitors

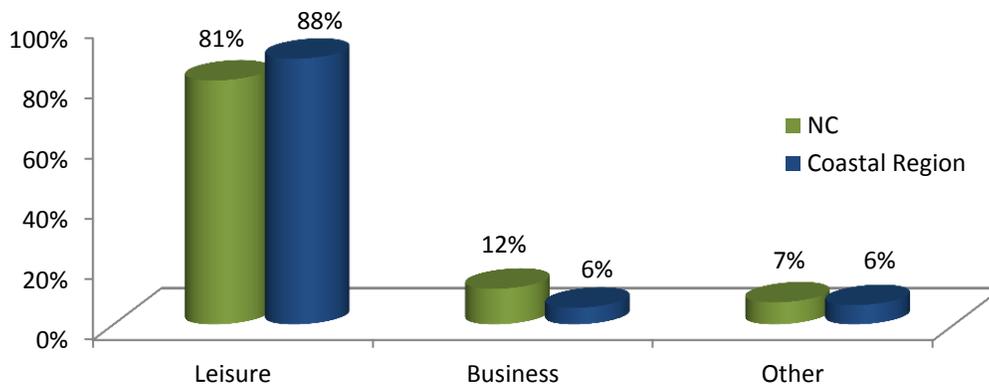
<i>DMA of Origin</i>	<i>2013 % of Total NC Visitors to Region</i>	<i>2012 % of Total NC Visitors to Region</i>	<i>2011 % of Total NC Visitors to Region</i>	<i>2010 % of Total NC Visitors to Region</i>	<i>2013 Coastal Share of Visitors from DMA</i>	<i>2012 Coastal Share of Visitors from DMA</i>	<i>2011 Coastal Share of Visitors from DMA</i>	<i>2010 Coastal Share of Visitors from DMA</i>
Raleigh-Durham (Fayetteville)	20.4%	15.2%	14.9%	20.9%	29.9%	26.2%	20.0%	29.6%
Charlotte	7.3%	6.3%	6.3%	7.0%	15.7%	12.0%	10.3%	15.3%
Greensboro-High Point- Winston Salem	6.2%	10.6%	6.0%	6.7%	18.9%	29.0%	13.7%	20.9%
Norfolk-Portsmouth- Newport News, VA	6.1%	3.5%	3.0%	6.1%	49.7%	26.9%	17.5%	40.0%
New York, NY	6.0%	5.3%	5.8%	6.5%	27.2%	24.1%	21.5%	26.3%
Greenville-New Bern-Washington	5.5%	7.6%	7.5%	3.9%	30.0%	42.3%	29.1%	19.5%
Washington DC Metro	4.9%	4.0%	5.8%	5.4%	24.0%	19.3%	28.2%	25.3%
Pittsburgh	4.0%	3.4%	3.0%	2.5%	59.7%	58.3%	40.0%	43.5%
Richmond-Petersburg, VA	4.0%	3.2%	4.2%	2.9%	48.5%	34.2%	36.8%	28.6%
Wilmington	2.3%	1.3%	1.2%	1.5%	19.0%	21.7%	9.8%	14.0%
Philadelphia, PA	1.9%	1.7%	4.7%	5.6%	18.3%	24.1%	39.0%	40.4%
Baltimore	1.3%	3.1%	1.9%	1.8%	30.5%	52.2%	23.1%	28.0%
Harrisburg-Lancaster-Lebanon-York	1.1%	0.7%	1.1%	0.6%	25.4%	23.1%	22.2%	25.0%
Columbus, OH	1.0%	1.3%	0.8%	0.8%	30.5%	41.7%	25.0%	25.0%
Roanoke-Lynchburg	1.0%	2.7%	2.5%	1.5%	11.4%	27.5%	23.5%	15.0%
Atlanta	0.9%	3.2%	1.9%	0.1%	3.4%	12.7%	5.1%	0.0%
Cleveland-Akron, OH	0.8%	1.0%	0.9%	1.0%	11.4%	14.3%	10.3%	28.6%

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

## 2013 Coastal Region versus North Carolina

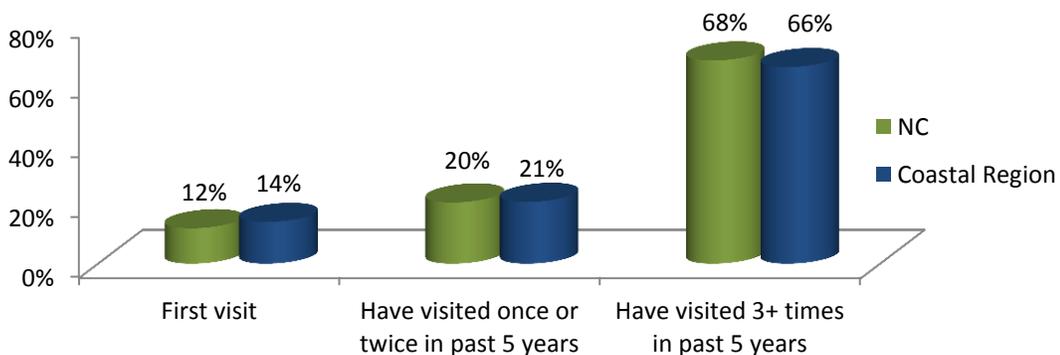
North Carolina’s Coastal Region had a larger share of overnight visitors travel to the region for leisure reasons than North Carolina as a state (81% North Carolina vs. 88% Coastal Region). At the same time, North Carolina’s share of business/convention travelers was nearly twice as large as the proportion for the Coastal Region (12% North Carolina vs. 6% Coastal Region).

**2013 Primary Purpose of Trip  
North Carolina vs. Coastal Region**



The proportion of first time visitors versus repeat visitors is very similar between the Coastal Region and North Carolina in general. North Carolina, and the coast, welcome the majority of its visitors are repeat visitors.

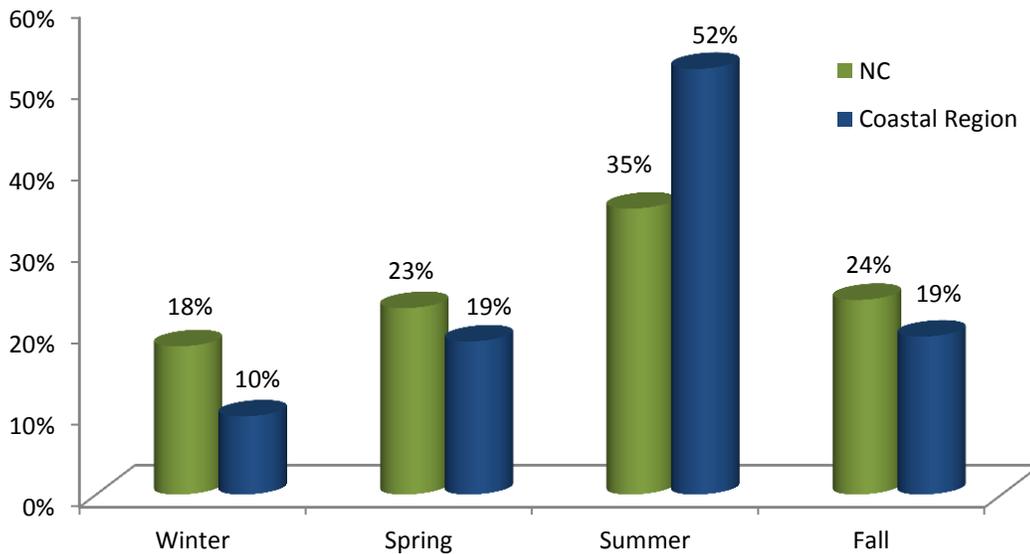
**2013 First Time vs. Repeat Visitors  
North Carolina vs. Coastal Region**



## Travel Volume by Season

During the summer season (June through August) the Coastal Region had a significantly higher percentage of overnight visitors than North Carolina as a whole, while North Carolina had higher percentages of visitors in the spring, fall and winter seasons.

### 2013 Season of Travel North Carolina vs. Coastal Region



## Average Length of Stay

In 2013, an average of 3.3 nights was spent by visitors to North Carolina’s Coastal Region, greater than the average North Carolina overnight visitor (2.7 nights).

## Travel Party Size

The average travel party size for all Coastal Region overnight visitors was 2.1 people, while the average party size of the North Carolina visitor was 1.9 people.

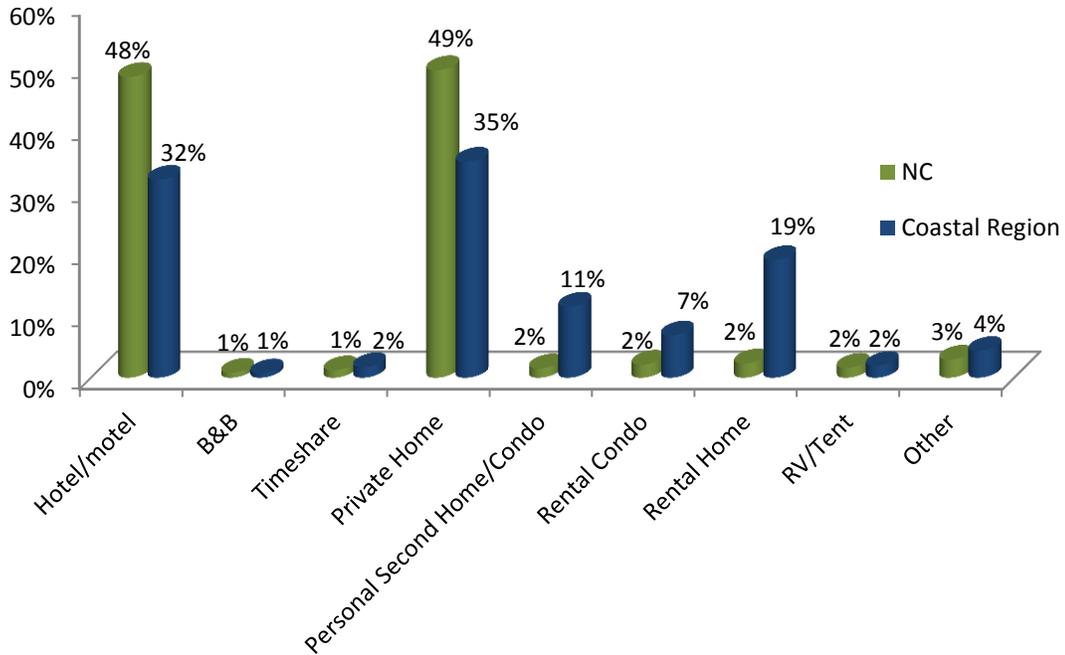
## Children on Trip

Thirty-three percent of overnight visitor parties to the Coastal Region in 2013 included children, down from thirty-nine percent in 2011. Twenty-three percent of overnight North Carolina visitor parties included children.

## Lodging Type

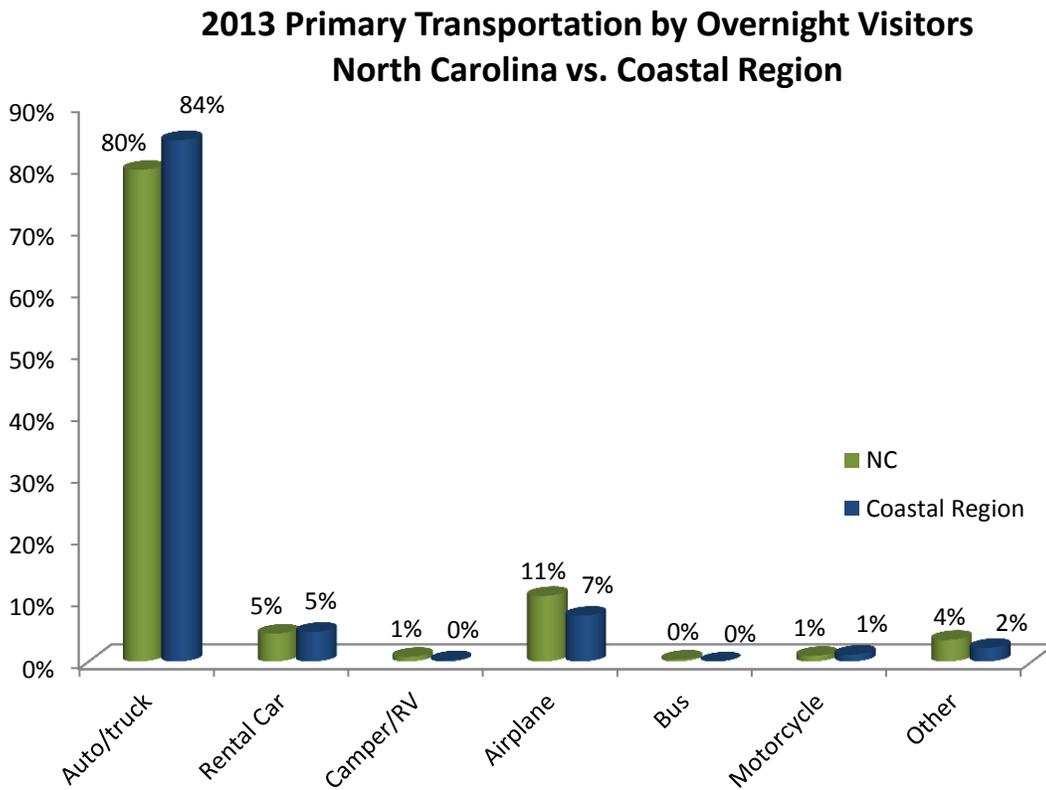
Both Coastal Region overnight visitors and North Carolina visitors in general are more likely to stay in a private home or hotel/motel than other types of lodging. However, Coastal visitors have a higher proportion for a rental condo (2% North Carolina vs. 7% Coastal Region) and rental home (2% North Carolina vs. 19% Coastal Region).

**2013 Lodging by Overnight Visitors to North Carolina vs. Coastal Region**



## Mode of Transportation

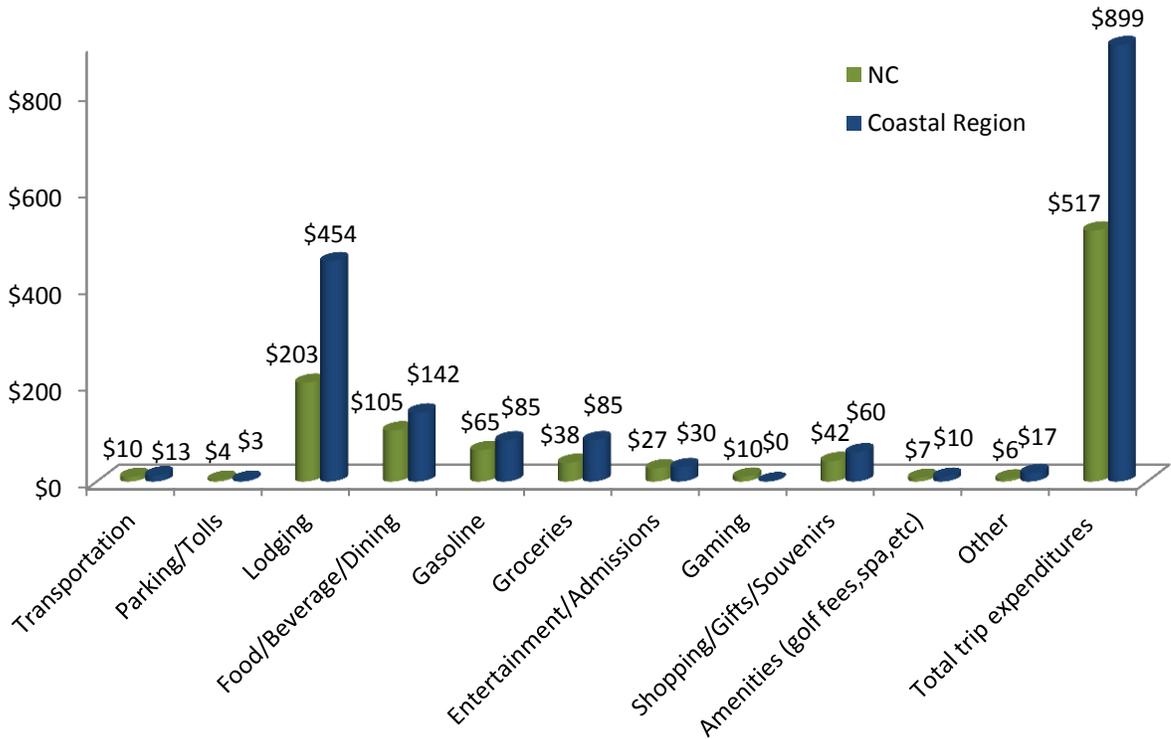
A higher percentage of travelers to the Coastal Region drove to their destination in 2013 than all North Carolina visitors (80% North Carolina vs. 84% Coastal Region), while a higher percentage of travelers to North Carolina flew to their destination than Coastal Region visitors (11% North Carolina vs. 7% Coastal Region).



## Amount Spent in Coastal Region

The average overnight visitor party spending in the Coastal Region was \$899, much higher than the state average party spending of \$517. Most of the difference is in lodging and food/beverage expenditures.

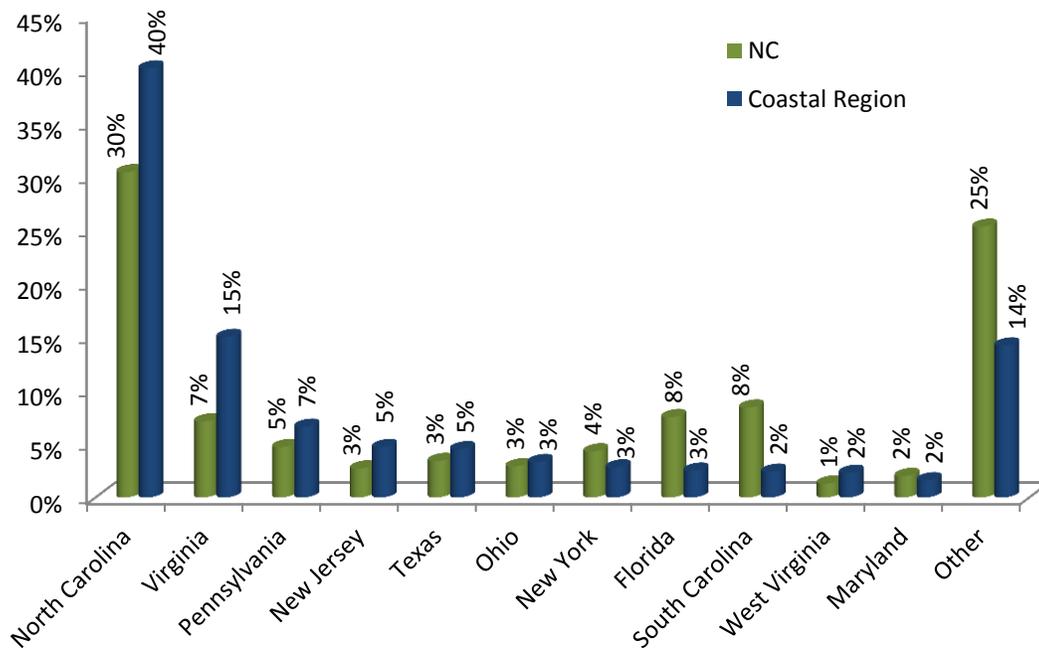
**2013 Average Spending by Overnight Visitor Parties  
North Carolina vs. Coastal Region**



## Origin of Overnight Visitors

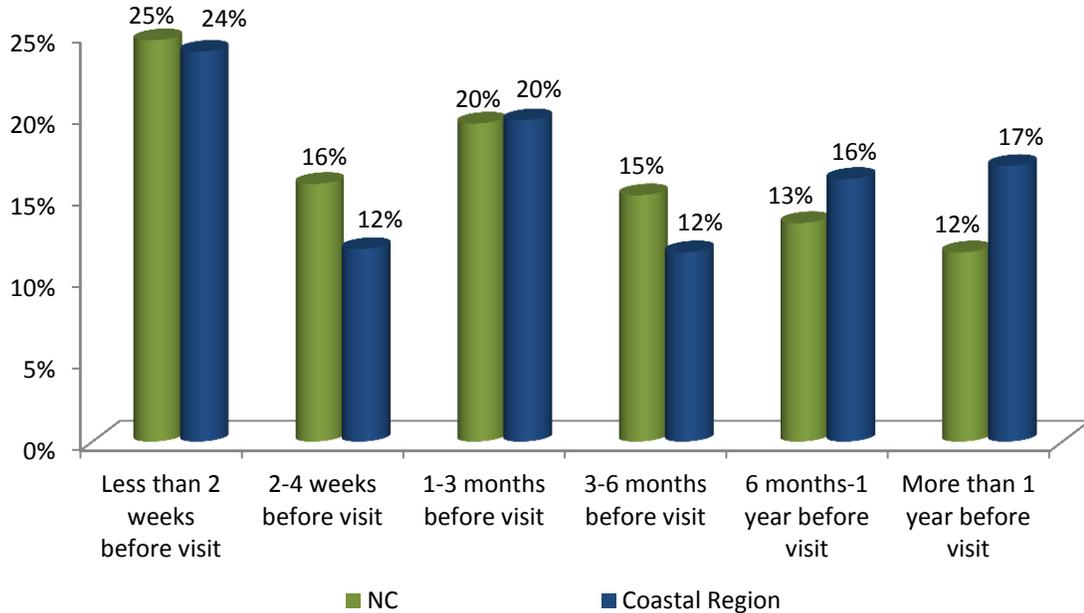
The top states of origin in 2013 are very similar between the Coastal Region and the state in general. However, the Coastal Region saw a higher percentage in-state travelers, as well as visitors from Virginia, Pennsylvania, New Jersey, and Texas than the state as a whole; while the state saw a larger proportion of visitors from New York, Florida and South Carolina than the Coastal Region.

**2013 Top States of Origin of Overnight Visitors  
North Carolina vs. Coastal Region**



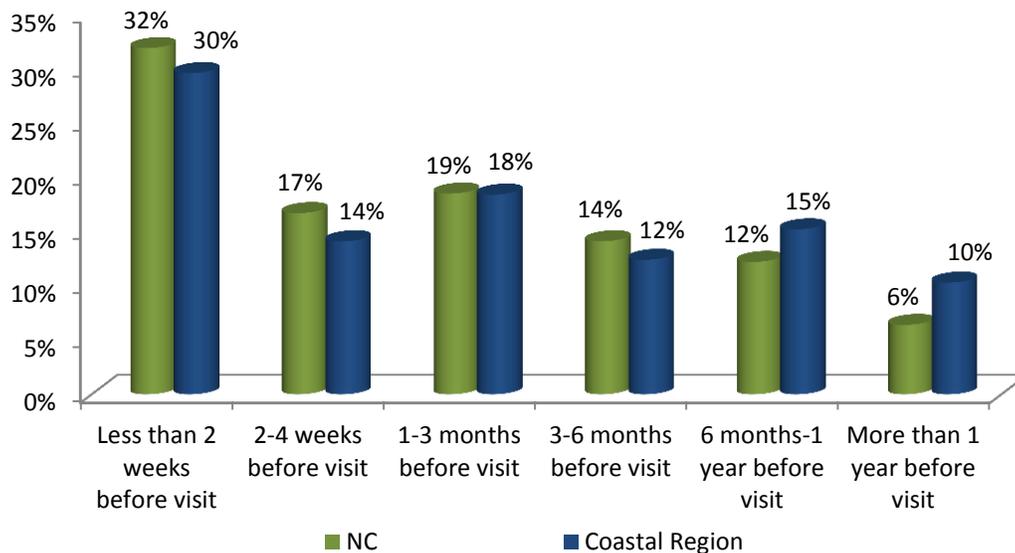
## Trip Planning

**2013 Length of Time to *Consider* NC as Travel Destination**



Coastal Region visitors typically consider and decide their vacation plans farther in advance than North Carolina visitors in general. After shortened planning periods in 2012, both Coastal and North Carolina overall visitors indicated longer planning periods in 2013. One third of Coastal Region visitors considered the state at least six months ahead of travel and a quarter of them decided to visit at least six months ahead of travel.

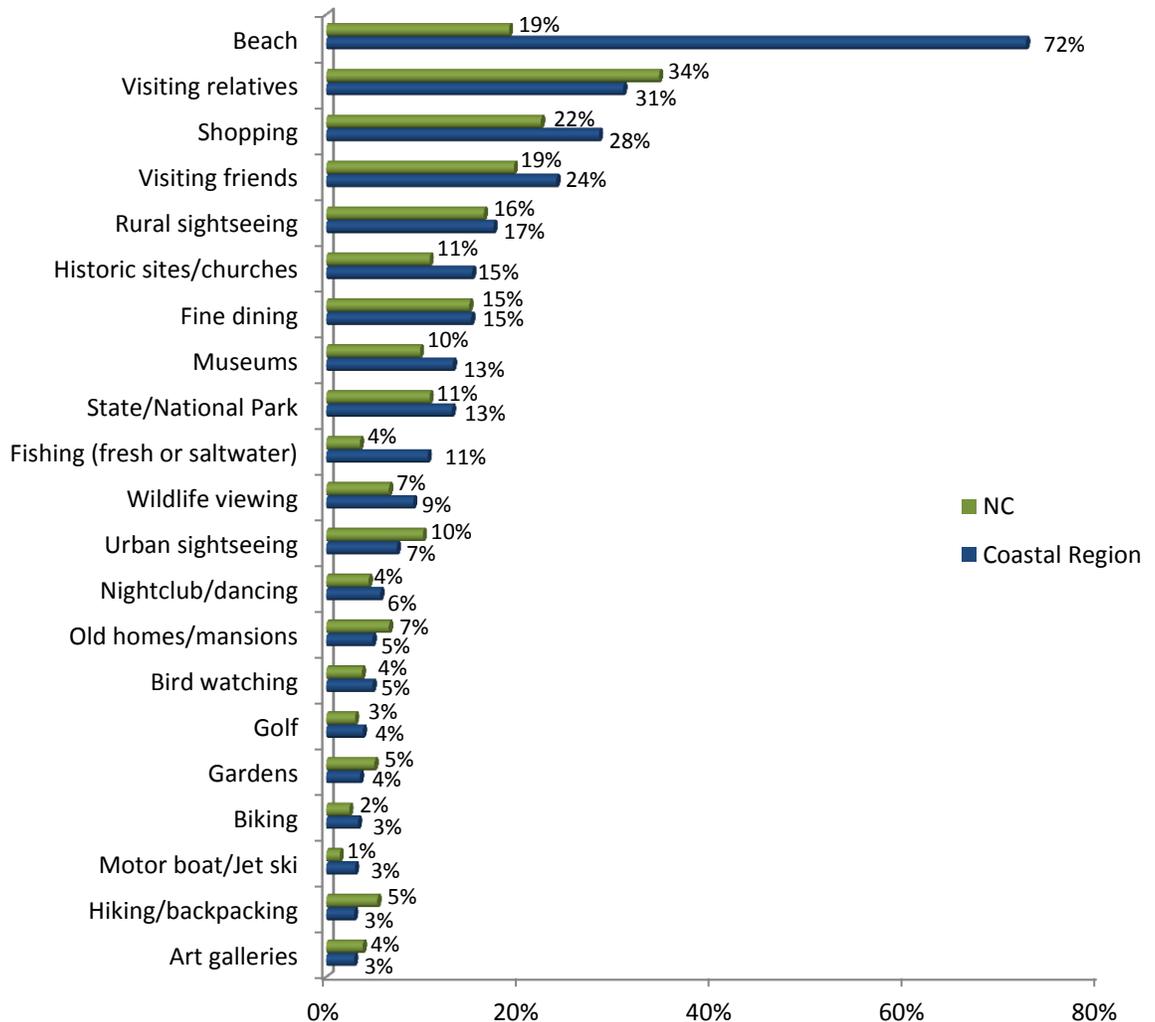
**2013 Length of Time *Decide* on NC as Travel Destination**



## Activities

The following chart compared activities participated in by Coastal Region visitors with those of North Carolina visitors. These are not indicative of purpose of trip, but a glimpse at what visitors enjoy doing while in North Carolina. Compared to all North Carolina overnight travelers, the Coastal Region naturally had a larger share of visitors go to the beach/waterfront (19% North Carolina vs. 72% Coastal Region). The region also had a larger proportion of visitors who shopped (22% North Carolina vs. 28% Coastal Region), visited friends (19% North Carolina vs. 24% Coastal Region), and visited a historic sites/churches (11% North Carolina vs. 15% Coastal Region). **\*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.**

2013 Activities Participated in by Overnight Visitors  
North Carolina vs. Coastal Region



## 2013 Demographic Profile for Overnight Visitor Parties to the Coastal Region

	<b>North Carolina</b>	<b>Coastal Region</b>
<b>Average age of household head</b>	47.9 years of age	46.5 years of age
<b>Education of Household Head</b>		
High school or less	12.7%	11.8%
Some college - no degree	21.5%	24.2%
Completed college	44.1%	43.6%
Post Graduate College	21.7%	20.4%
<b>Annual Household Income</b>		
Less than \$25,000	16.0%	11.4%
\$25,000-\$49,999	22.9%	21.2%
\$50,000-\$74,999	21.0%	20.5%
\$75,000 & over	40.1%	47.1%
<b>Marital Status</b>		
Married	57.5%	57.4%
Never married	20.1%	22.9%
Divorced, widowed, separated	22.4%	19.7%
<b>Ethnicity</b>		
White	83.3%	88.8%
Black/African American	11.1%	5.2%
Asian or Pacific Islander	2.1%	1.4%
Other	3.5%	4.6%

## 2013 Top Advertising Markets

While the top ten advertising markets sending visitors to North Carolina’s Coastal Region are similar to the top ten advertising markets for the state of North Carolina, there are visitor shares from advertising markets that differ slightly; such as Raleigh-Durham (13% North Carolina vs. 20% Coastal Region) and Charlotte (9% North Carolina vs. 7% Coastal Region).

### Top Advertising Markets of Origin for 2013 Overnight Coastal Region Visitors VS. North Carolina Visitors

<i>DMA of Origin</i>	<i>Percent of Total Visitors to Coastal Region</i>	<i>Percent of Total Visitors to North Carolina</i>
Raleigh-Durham (Fayetteville)	20.4%	13.0%
Charlotte	7.3%	9.0%
Greensboro-High Point-Winston Salem	6.2%	6.3%
Norfolk-Portsmouth-Newport News, VA	6.1%	2.3%
New York, NY	6.0%	4.2%
Greenville-New Bern-Washington	5.5%	3.5%
Washington DC (Hagerstown, MD)	4.9%	4.0%
Pittsburgh	4.0%	1.3%
Richmond-Petersburg, VA	4.0%	1.6%
Wilmington	2.3%	2.4%
Philadelphia, PA	1.9%	2.0%
Baltimore	1.3%	0.9%
Harrisburg-Lancaster-Lebanon-York	1.1%	0.9%
Columbus, OH	1.0%	0.6%
Roanoke-Lynchburg	1.0%	1.6%
Atlanta	0.9%	5.3%

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

## 2013 Domestic Piedmont Region Travel

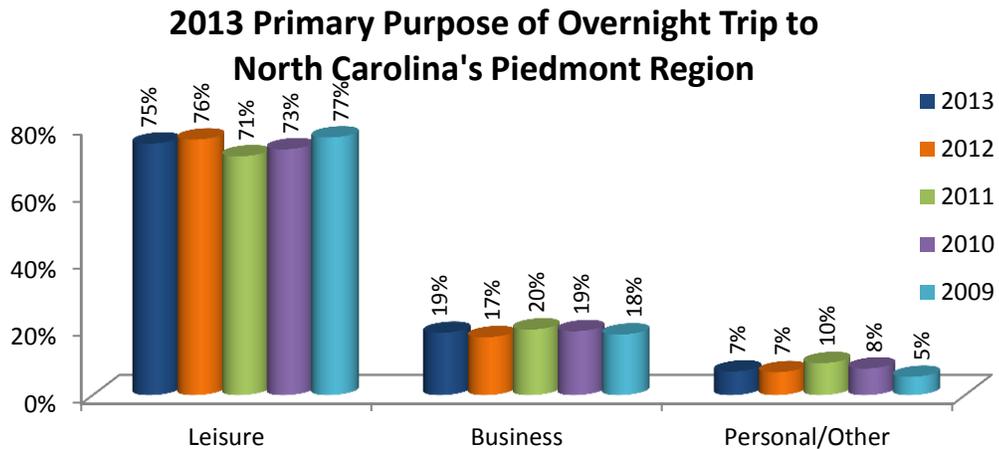
### Summary

- ◆ In 2013, fifty-six percent of North Carolina visitors traveled to North Carolina’s Piedmont Region, approximately 29.6 million person-trips. For marketing purposes, the Piedmont Region is made up of the 49 most central counties of North Carolina.
- ◆ Seventy-three percent of all domestic visitors came to the Piedmont Region for pleasure purposes, while nineteen percent of visitors came to conduct business (includes meeting/convention). The remaining eight percent visited for “other” reasons.
- ◆ Travel to the Piedmont Region of North Carolina was fairly consistent throughout the seasons. However, the spring (March - May) had a slightly higher proportion of visitors, with twenty-seven percent of all 2013 piedmont visitors. Fall (September - November) followed with twenty-six percent of piedmont visitors, followed by summer (June - August) with twenty-five percent and winter (December - February) with twenty-two percent. July and October were most popular months for piedmont travel with eleven percent each.
- ◆ Overnight visitors to the Piedmont Region spent an average of 2.7 nights in the region. This was down from 3.1 nights in 2012.
- ◆ Forty-nine percent of Piedmont Region visitors stayed in a private home while forty-eight percent of visitors lodged in a hotel/motel.
- ◆ The average travel party size for all Piedmont Region visitors was 1.8 people, slightly down from 1.9 in 2012. Twenty-two percent of travel parties to the region included children in the party.
- ◆ Seventy-eight percent of all overnight travelers to the Piedmont Region drove (includes personal automobile, rental, and motorcycle), while nearly eighteen percent traveled by air.
- ◆ In 2013, the average household trip expenditure in the Piedmont Region was \$304. The average household trip expenditure for overnight visitors to the Piedmont Region was \$386. Daytrip parties to the Piedmont region spent approximately \$149 per visit in 2013.
- ◆ The top states of origin of *overnight* visitors to the Piedmont Region in 2013 were North Carolina (33.4%), South Carolina (11.3%), Georgia (7.3%), Virginia (6.7%), and New York (5.0%).
- ◆ Fifty-six percent of the households that traveled to North Carolina’s Piedmont Region in 2013 had a household income over \$50,000.
- ◆ In 2013, Raleigh/Durham/Fayetteville (11.6%), was the top advertising market of origin for *overnight* travelers to the Piedmont Region, followed by Charlotte (10.7%), Atlanta (5.5%), Greensboro/High Point/Winston-Salem (5.4%), Greenville-Spartanburg-Asheville-Anderson (5.3%), New York (4.2%), and Columbia, SC (3.6%).

## Piedmont Region Overnight Visitor Profile

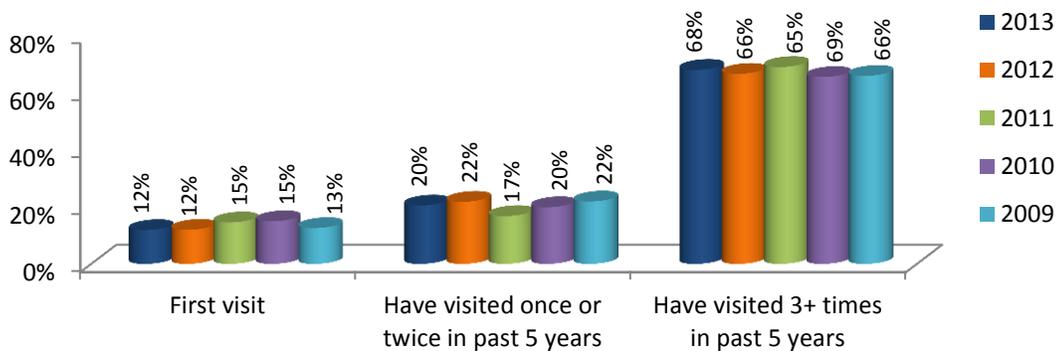
### Main Purpose of Visit

In 2013, seventy-five percent of domestic overnight visitors came to the Piedmont Region for leisure purposes, which included visiting friends and relatives, outdoor recreation and entertainment/sightseeing. Business travel increased slightly in proportion of total slightly from 2012 to nineteen percent.



Repeat visitors to North Carolina comprised the largest proportion of Piedmont Region visitors.

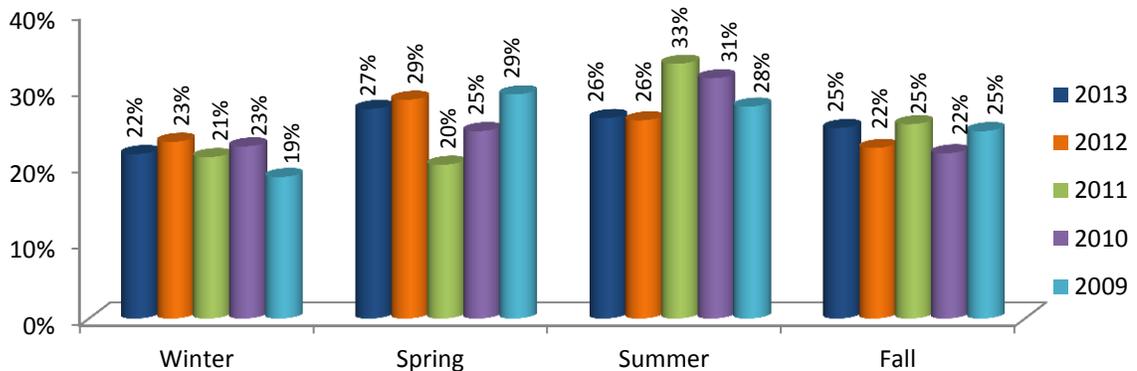
### 2013 First Time vs. Repeat Visitors to North Carolina's Piedmont Region



## Travel Volume by Season

Though the Piedmont Region typically sees more consistent visitation throughout the year than the other two regions, 2013 saw the fall increase in proportion of visitors from 22 percent to 25 percent. The spring season (March through May) saw the largest proportion of visitors with twenty-seven percent, down from 29 percent in 2012.

### 2013 Overnight Travel by Season to North Carolina's Piedmont Region



## Average Length of Stay

In 2013, an average of 2.7 nights was spent by visitors to North Carolina's Piedmont Region. This was a decrease from the 2012 average length of stay of 3.1 nights. Data indicates that out-of-state visitors stay an average of 3.3 nights, while in-state visitors stay an average of 1.7 nights.

## Travel Party Size

The average travel party size for all Piedmont Region overnight visitors was 1.8 people, down slightly from 2012 (1.9).

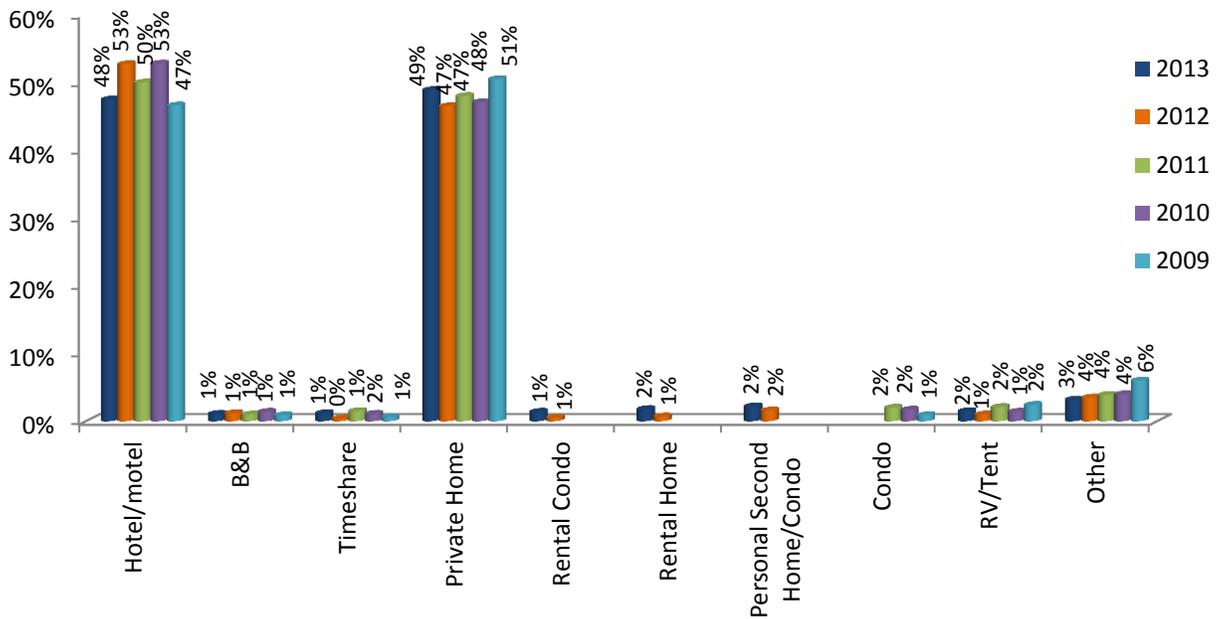
## Children on Trip

Twenty-two percent of overnight visitor parties to the Piedmont Region included children. Among those who traveled with children, the average number of children on trips was 1.7.

## Lodging Used in Piedmont Region

In 2013, nearly half of Piedmont Region visitors stayed in a hotel/motel (48%), while nearly half (49%) of visitors stayed in a private home. Note that in 2012 the lodging categories changed to better reflect the use of rental homes/condos and personal second homes/condos, therefore comparisons between lodging categories before 2012 should be made with caution. It should also be noted that some visitors use more than one type of accommodation during a visit, so totals equal more than 100%.

### 2013 Lodging by Overnight Visitors to North Carolina's Piedmont Region

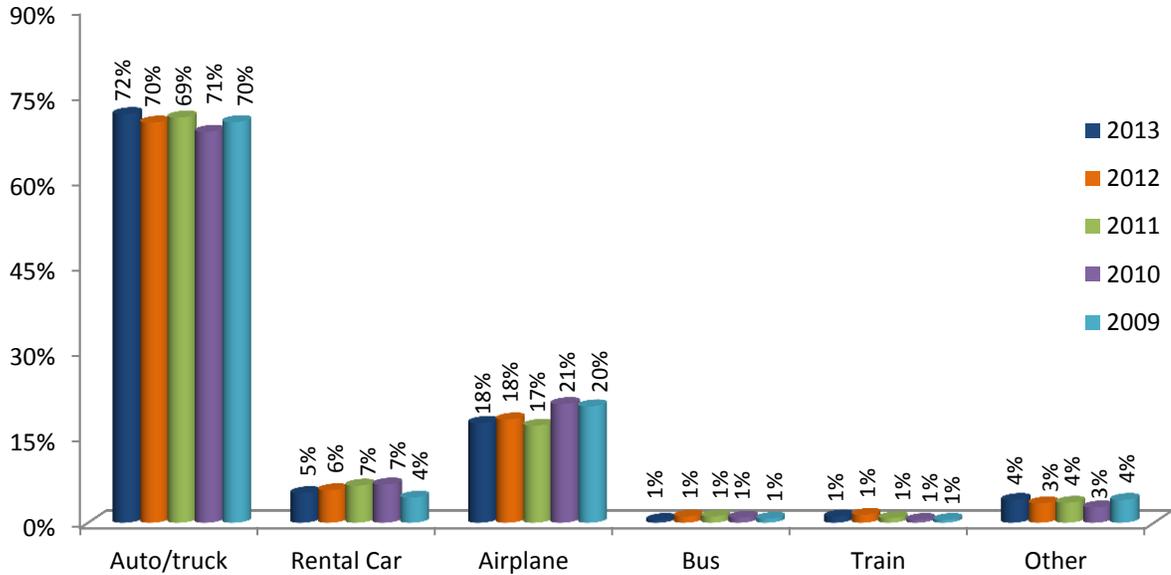


\*percentages add to more than 100% due to multiple responses.

## Mode of Transportation

In 2013, the personal auto was most used form of transportation (72%) to the Piedmont Region, however eighteen percent traveled by air.

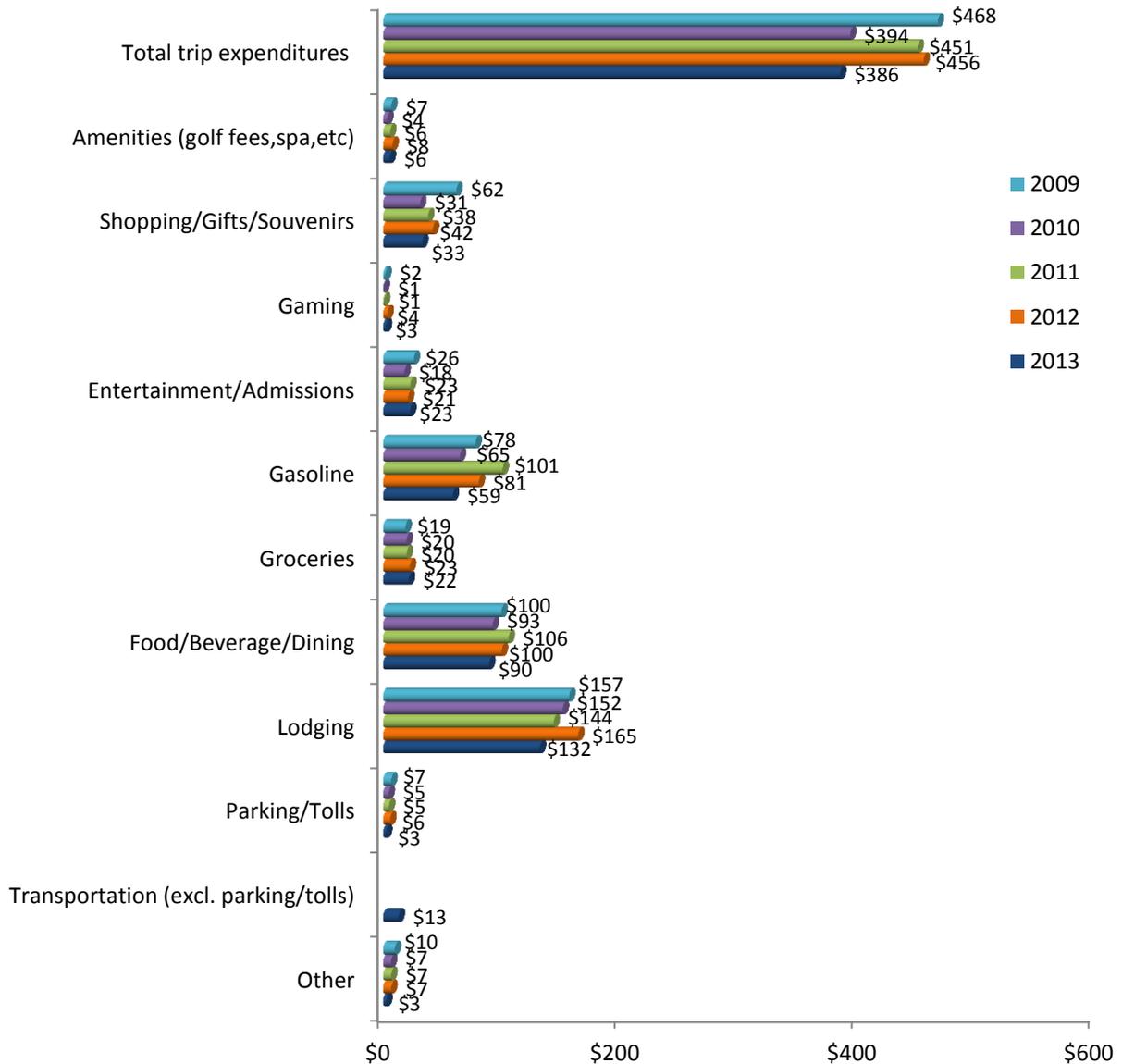
**2013 Primary Mode of Transportation to North Carolina's Piedmont Region**



## Amount Spent in Piedmont Region

The average overnight visitor party spending in the Piedmont Region was \$386, down somewhat from \$456 in 2012. When taking into account the decrease in length of stay from 2012 to 2013, overnight average visitor daily spending was actually only down \$4 (3%) in the Piedmont Region.

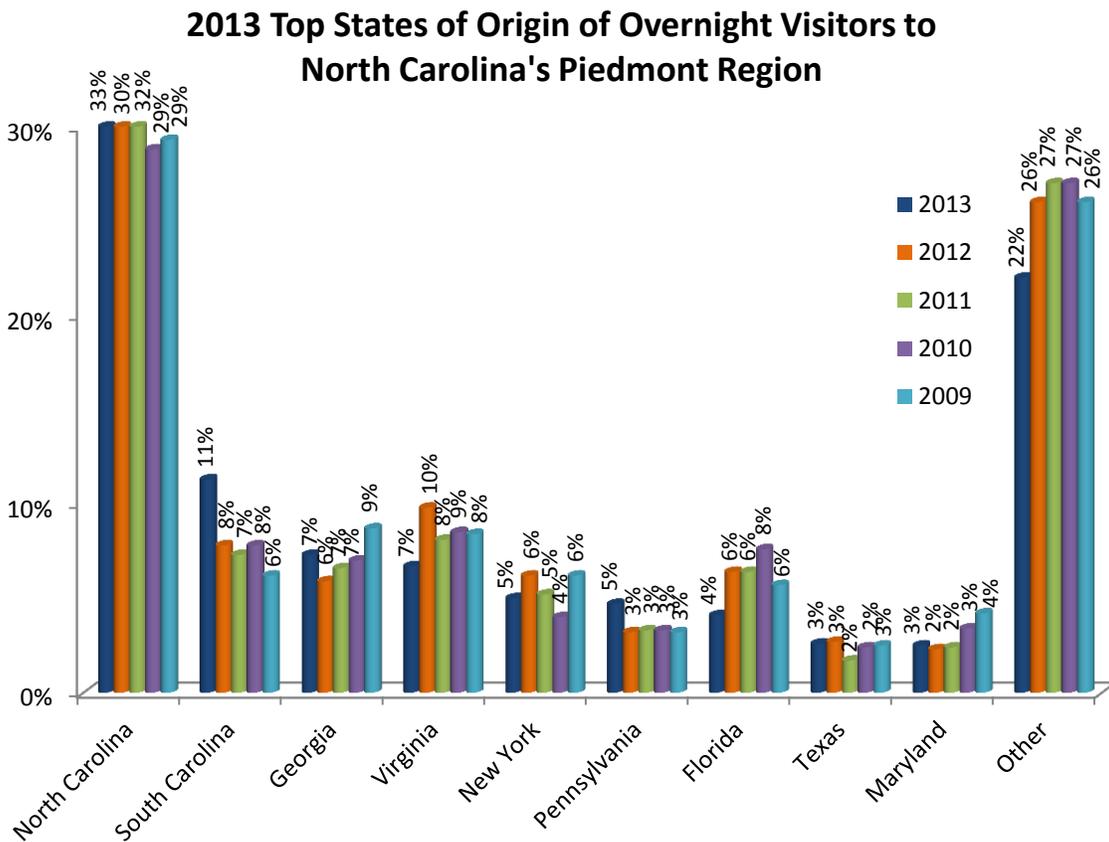
### 2013 Average Spending by Overnight Visitor Parties in North Carolina's Piedmont Region



\*Transportation categories changed in 2013 to better reflect transportation to versus within the state, thus comparisons to previous years for that category are not valid. Total expenditures for years prior to 2013 have been revised to allow for accurate comparisons.

## Origin of Visitors

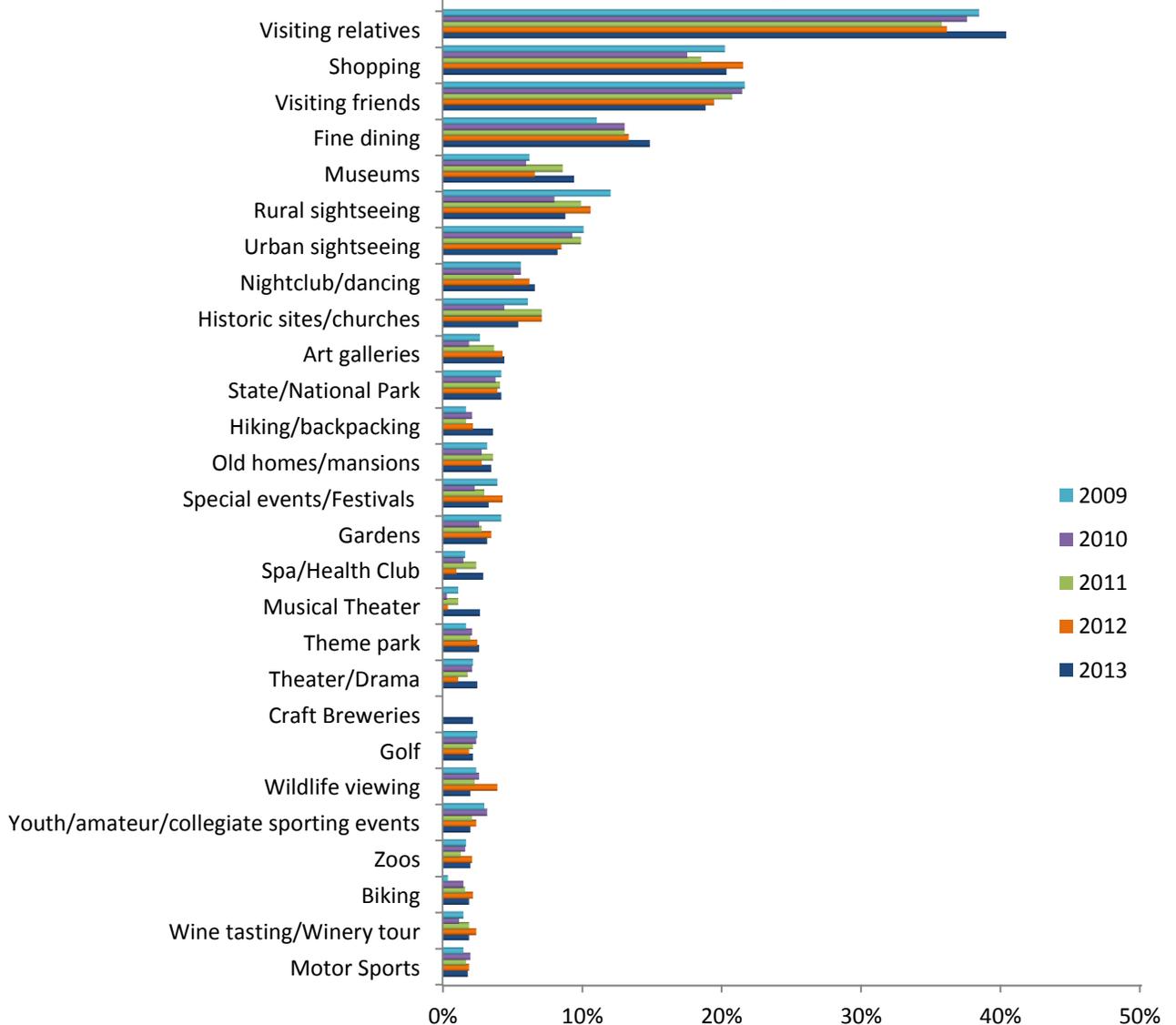
In 2013, the top states of origin for Piedmont Region overnight visitors included North Carolina (33%), South Carolina (11%), Georgia (7%), Virginia (7%), New York (5%), Pennsylvania (5%) and Florida (4%). The proportion of in-state visitors to the Piedmont Region increased slightly from 30% in 2012 to 33% in 2013, as did the proportion of visitors from South Carolina (from 8% in 2012 to 11% in 2013), while visitors from Virginia, and Florida declined in proportion.



## Activities

The following chart provides activities participated in by Piedmont Region visitors. These are not indicative of purpose of trip, but a glimpse at what visitors enjoy doing while in North Carolina. Over one-third (40%) of the overnight visitors to North Carolina’s Piedmont Region visited relatives while visiting the region, an increase from 36 percent in 2012. Twenty percent shopped and nearly twenty percent (19%) visited friends. Other popular activities included fine dining (15%), museums (9%), rural sightseeing (9%), and urban sightseeing (8%). **\*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.**

**2013 Activities Participated in by Overnight Visitors to North Carolina's Piedmont Region**



## **Demographic Profile of North Carolina Overnight Visitors to the Piedmont Region**

More than half of the Piedmont Region's overnight visitors (53.2%) of the visitors are married and twenty-three percent of the region's visitors are divorced, widowed or separated.

The largest proportion of North Carolina Piedmont Region overnight visitors classify themselves as white (77.6%), and seventeen percent classify themselves as black/African American.

Nearly two-thirds (65.7%) of Piedmont Region overnight visitor parties have a household head with a college degree or higher. The average Piedmont Region visitor is 46 years old, with half (50.6%) being 45 years old or older.

More than one-third (38.6%) of the visitor parties that traveled to North Carolina's Piedmont Region in 2013 had a household income \$75,000 or over. Fourteen percent had a household income of over \$125,000.

## 2013 Top Advertising Markets

In 2013, the top advertising markets sending overnight visitors to **North Carolina's Piedmont Region** were Raleigh-Durham-Fayetteville (11.6%), Charlotte (10.7%), Atlanta (5.5%), Greensboro-High Point-Winston Salem (5.4%), and Greenville-Spartanburg-Asheville-Anderson (5.3%). Advertising markets correspond with Nielsen's Designated Market Areas (DMAs).

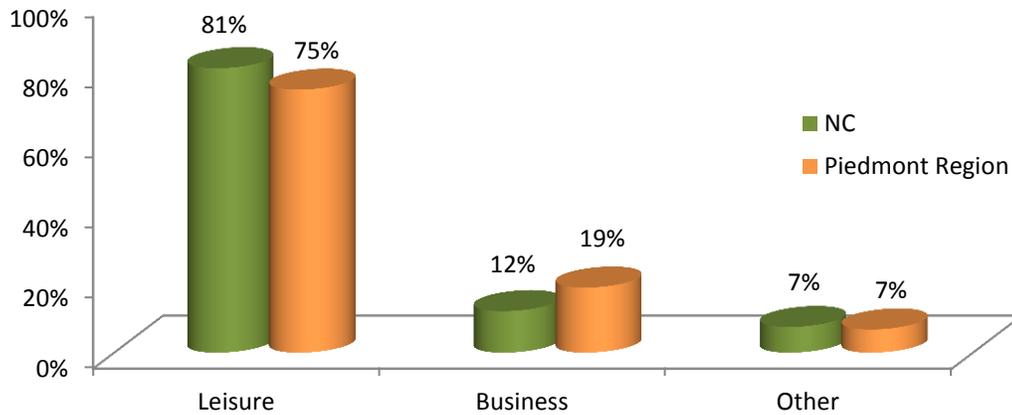
### Top Advertising Markets of Origin for *Overnight* Piedmont Region Visitors

<i>DMA of Origin</i>	<i>2013 % of Total NC Visitors to Region</i>	<i>2012 % of Total NC Visitors to Region</i>	<i>2011 % of Total NC Visitors to Region</i>	<i>2010 % of Total NC Visitors to Region</i>	<i>2013 Piedmont Share of Visitors from DMA</i>	<i>2012 Piedmont Share of Visitors from DMA</i>	<i>2011 Piedmont Share of Visitors from DMA</i>	<i>2010 Piedmont Share of Visitors from DMA</i>
Raleigh-Durham (Fayetteville)	11.6%	9.3%	10.4%	8.4%	38.5%	38.9%	25.6%	28.9%
Charlotte	10.7%	9.0%	11.6%	7.9%	51.4%	41.1%	35.0%	42.6%
Atlanta	5.5%	3.5%	4.3%	4.9%	44.9%	33.3%	22.0%	53.3%
Greensboro-High Point-Winston Salem	5.4%	5.1%	5.3%	5.2%	37.0%	33.8%	22.6%	39.5%
Greenville-Spartanburg-Asheville-Anderson	5.3%	4.2%	3.3%	4.5%	50.9%	38.1%	25.3%	48.4%
New York, NY	4.2%	4.9%	5.1%	4.6%	43.2%	54.0%	34.4%	45.5%
Columbia	3.6%	2.8%	0.8%	1.2%	70.7%	76.5%	14.3%	30.8%
Washington DC Metro	3.5%	4.0%	3.2%	4.5%	37.8%	45.8%	26.8%	51.7%
Greenville-New Bern-Washington	3.0%	2.8%	4.6%	3.4%	37.0%	38.0%	32.6%	40.2%
Roanoke-Lynchburg	2.7%	2.6%	1.9%	1.9%	73.0%	62.5%	35.3%	45.0%
Philadelphia	2.6%	1.7%	1.5%	2.6%	55.9%	55.2%	22.0%	43.9%
Wilmington	2.3%	1.5%	2.4%	2.2%	41.1%	65.2%	36.6%	48.8%
Orlando-Daytona Beach-Melbourne	1.6%	1.2%	2.0%	2.2%	40.7%	41.4%	35.3%	48.8%
Cleveland-Akron	1.5%	1.6%	1.4%	0.8%	54.6%	57.1%	31.0%	57.1%
Chicago	1.5%	1.3%	0.4%	0.8%	49.9%	50.0%	10.3%	61.5%
Pittsburgh	1.3%	0.9%	0.7%	0.8%	43.9%	37.5%	16.0%	34.8%
Baltimore	1.2%	0.8%	1.8%	1.3%	56.8%	34.8%	42.3%	52.0%
Harrisburg-Lancaster-Lebanon-York	1.2%	2.6%	4.0%	1.6%	56.8%	46.2%	43.9%	26.7%

## 2013 Piedmont Region versus North Carolina

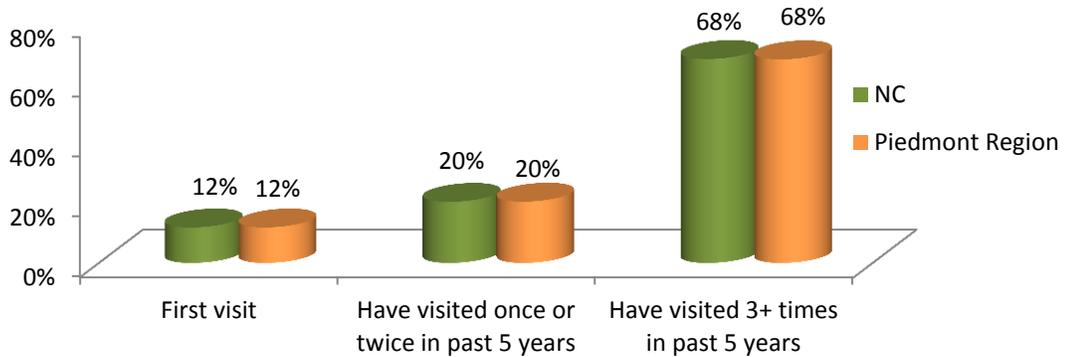
North Carolina’s Piedmont Region had a smaller share of visitors travel to the region for leisure reasons than North Carolina as a state (81% North Carolina vs. 75% Piedmont Region). At the same time, North Carolina’s share of business/convention travelers was smaller than the proportion for the Piedmont Region (12% North Carolina vs. 19% Piedmont Region).

### 2013 Primary Purpose of Trip North Carolina vs. Piedmont Region



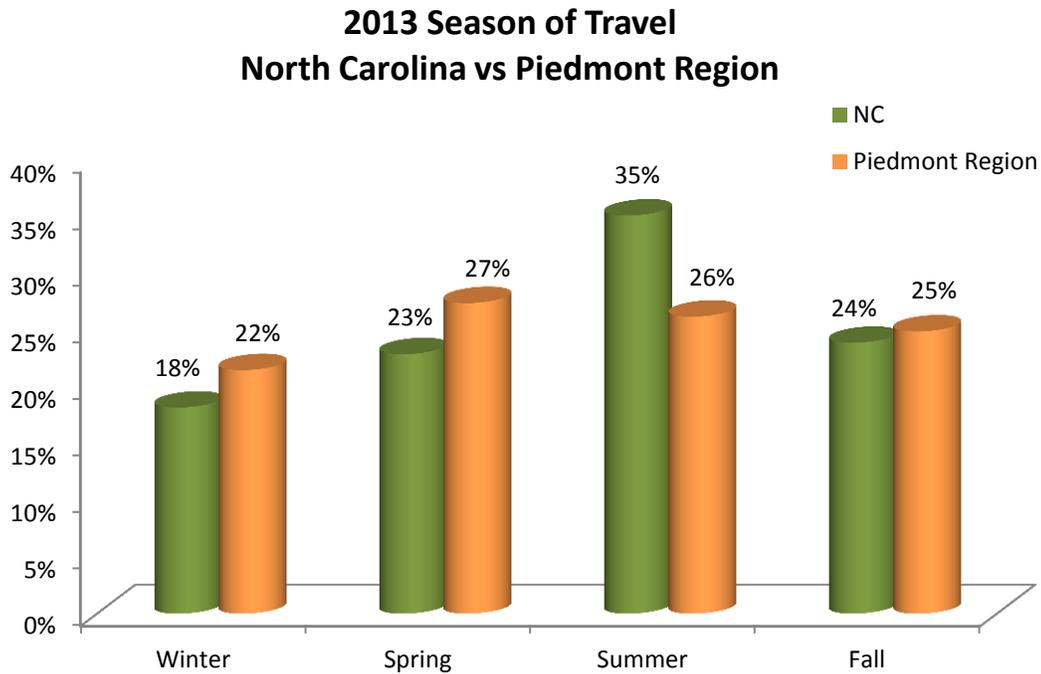
The proportions of repeat and first time visitors to the Piedmont Region are identical to those of North Carolina’s visitors in general.

### 2013 First Time vs. Repeat Visitors North Carolina vs. Piedmont Region



## Travel Volume by Season

During the summer season (June through August) the state as a whole had a larger percentage of overnight visitors than the Piedmont Region, while the Piedmont Region had higher percentages of visitors in the winter, spring and fall seasons.



## Average Length of Stay

In 2013, an average of 2.7 nights were spent by visitors to North Carolina’s Piedmont Region, the same as the average by North Carolina overnight travelers in general.

## Travel Party Size

The average travel party size for all Piedmont Region overnight visitors was 1.8 people, just less than the average party size of the North Carolina visitor (1.9).

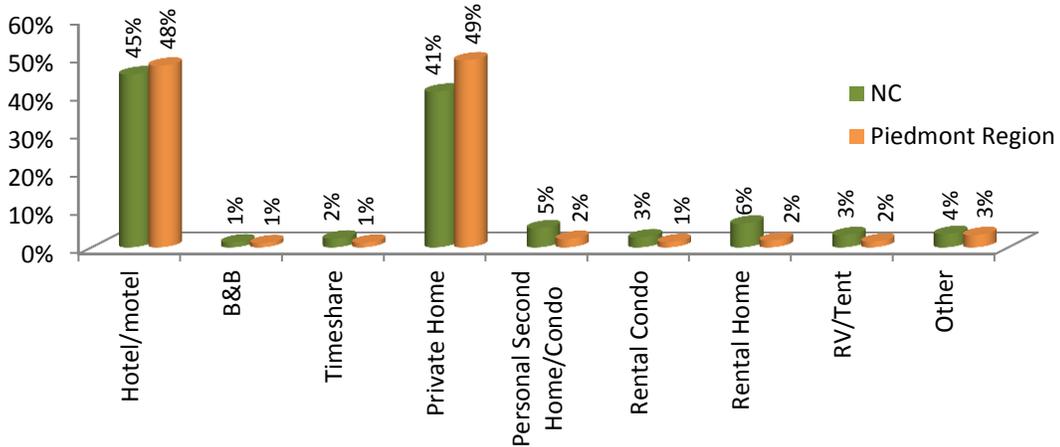
## Children on Trip

Twenty-two percent of overnight visitor parties to the Piedmont Region included children. Twenty-three percent of overnight North Carolina visitor parties included children.

## Lodging Type

Both Piedmont Region overnight visitors and North Carolina visitors in general are more likely to stay in a private home or hotel/motel than other types of lodging. Half of the Piedmont Region visitors stay in private homes, while nearly half stay in a hotel/motel.

**2013 Lodging by Overnight Visitors to North Carolina vs. Piedmont Region**

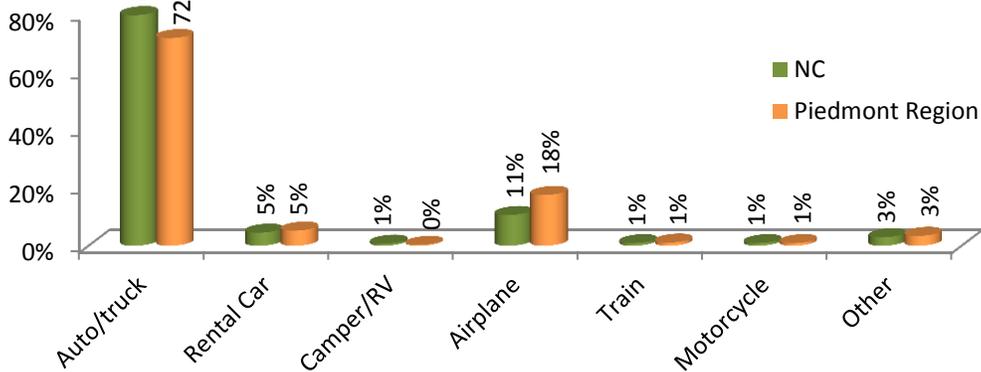


\*percentages add to more than 100% due to multiple responses.

## Mode of Transportation

A higher percentage of travelers to the Piedmont Region flew to their destination than all North Carolina visitors (13% North Carolina vs. 18% Piedmont Region), while a higher percentage of travelers to North Carolina drove to their destination than Piedmont Region visitors (80% North Carolina vs. 72% Piedmont Region).

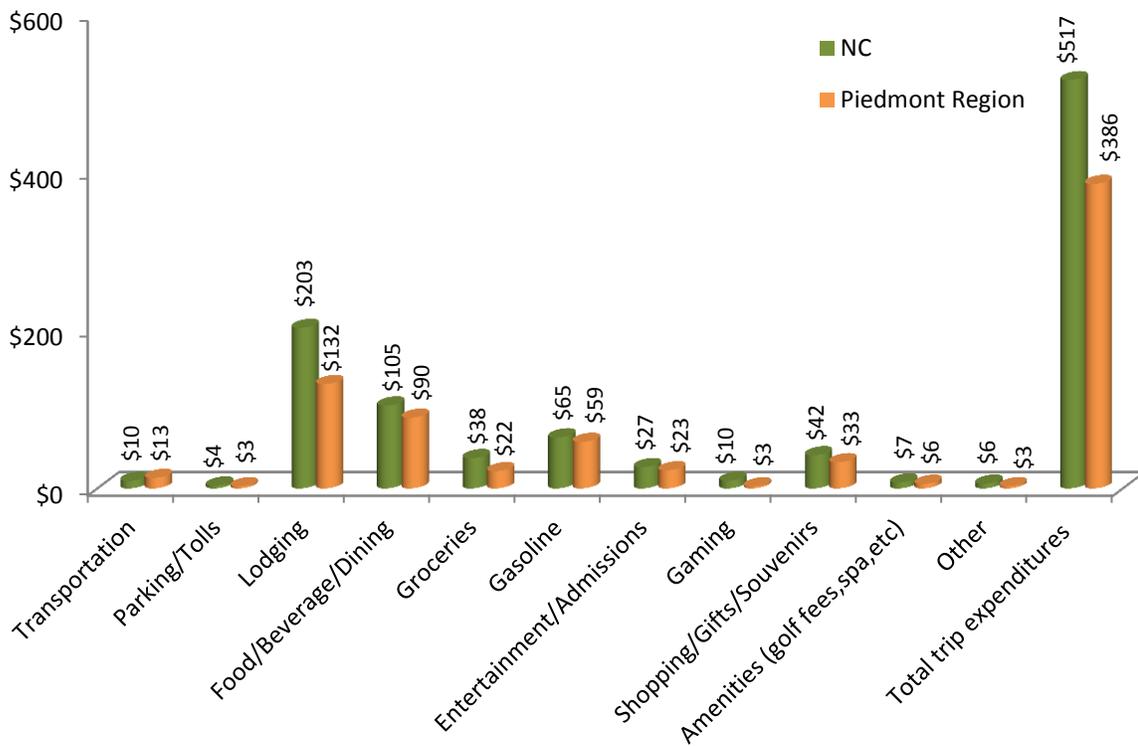
**2013 Primary Transportation by Overnight Visitors North Carolina vs. Piedmont Region**



## Amount Spent in Piedmont Region

The average overnight visitor party spending in the Piedmont Region was \$386, lower than the state average party spending of \$517. Piedmont Region visitors spent more on transportation than visitors statewide, but less than statewide visitors in all other categories. This is likely due to the shorter length of stay in the Piedmont Region.

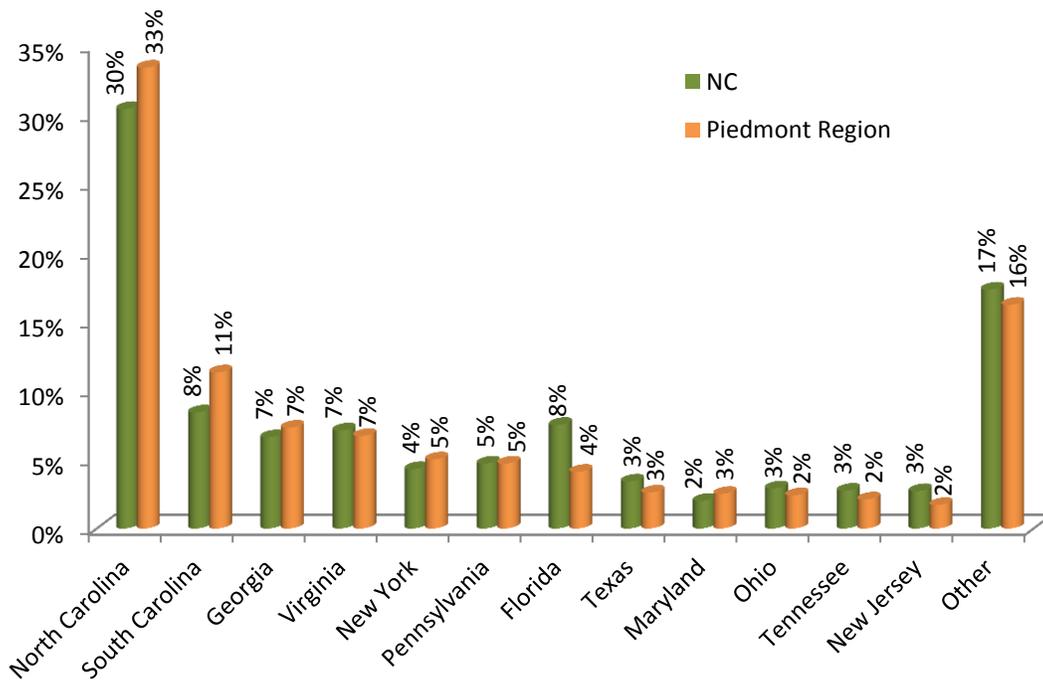
**2013 Average Spending by Overnight Visitor Parties  
North Carolina vs. Piedmont Region**



## Origin of Overnight Visitors

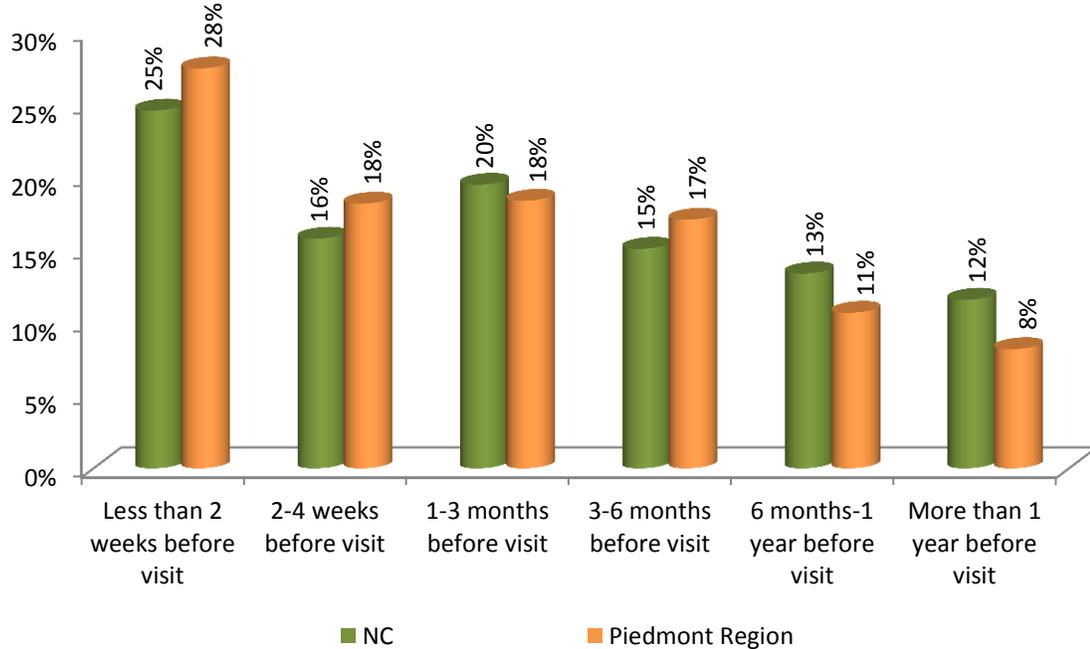
The top states of origin for the state and the Piedmont Region were similar in 2013, with only slight variances between states. The Piedmont Region saw a higher percentage of in-state visitors than the state as a whole in 2013.

**2013 Top States of Origin of Overnight Visitors  
North Carolina vs. Piedmont Region**



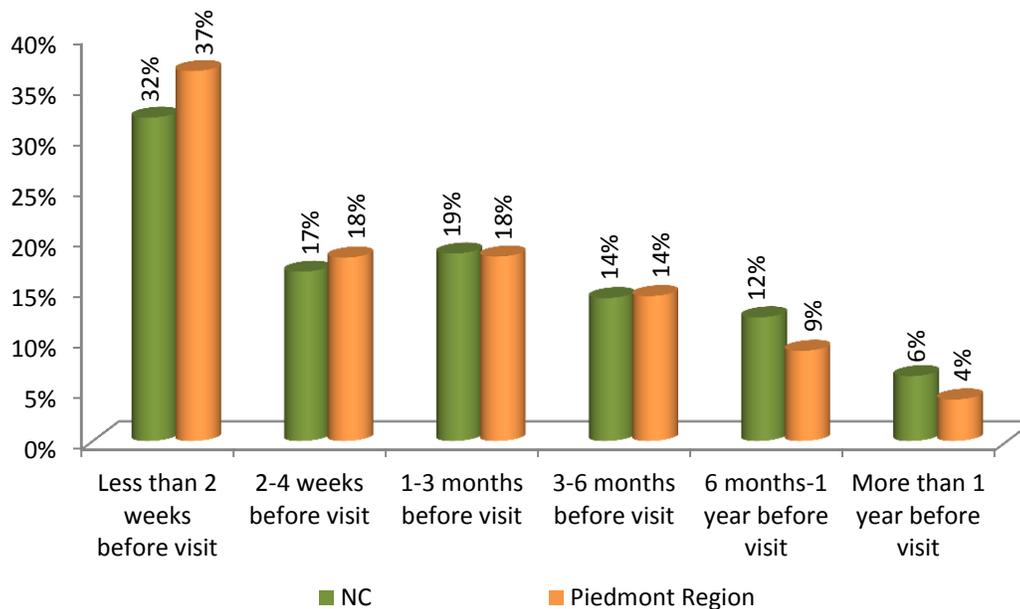
Trip Planning

2013 Length of Time to Consider NC as Travel Destination



Lead times for consideration and decision of travel than North Carolina visitors between the Piedmont Region visitor and North Carolina visitors in general are similar. Over forty-five percent of Piedmont Region visitors considered the state one month or less ahead of travel, and fifty-five percent decided to visit less than one month prior to travel.

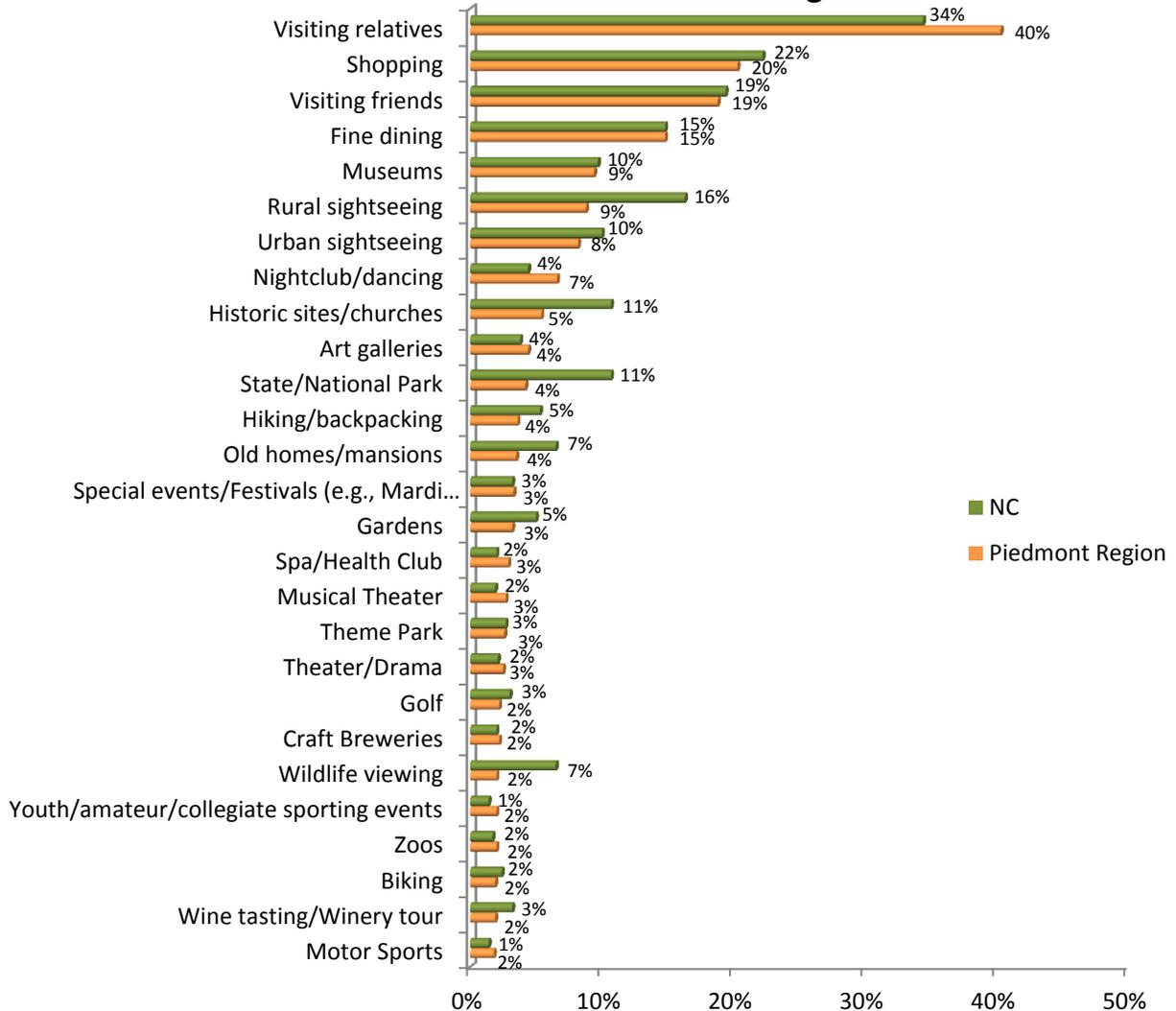
2013 Length of Time Decide on NC as Travel Destination



## Activities

The following chart compared activities participated in by Piedmont Region visitors with those of North Carolina visitors. These are not indicative of purpose of trip, but a glimpse at what visitors enjoy doing while in North Carolina. Compared to all North Carolina overnight travelers, the Piedmont Region had a larger share of visitors who visited relatives (34% North Carolina vs. 40% Piedmont Region). **\*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.**

**2013 Activities Participated in by Overnight Visitors  
North Carolina vs. Piedmont Region**



## 2013 Demographic Profile for Overnight Visitor Parties to the Piedmont Region

	<b>North Carolina</b>	<b>Piedmont Region</b>
<b>Average age of household head</b>	47.9 years of age	45.6 years of age
<b>Education of Household Head</b>		
High school or less	12.7%	11.4%
Some college - no degree	21.5%	22.9%
Completed college	44.1%	42.3%
Post Graduate College	21.7%	23.5%
<b>Annual Household Income</b>		
Less than \$25,000	16.0%	18.4%
\$25,000-\$49,999	22.9%	23.5%
\$50,000-\$74,999	21.0%	19.6%
\$75,000 & over	40.1%	38.6%
<b>Marital Status</b>		
Married	57.5%	53.2%
Never married	20.1%	23.4%
Divorced, widowed, separated	22.4%	23.4%
<b>Ethnicity</b>		
White	83.3%	77.6%
Black/African American	11.1%	17.1%
Asian or Pacific Islander	2.1%	2.1%
Other	3.5%	3.2%

## 2013 Top Advertising Markets

The top ten advertising markets sending visitors to North Carolina’s Piedmont Region are very similar to the top ten advertising markets for the state of North Carolina. The largest difference was the Charlotte advertising market (9% North Carolina vs. 11% Piedmont Region).

### **Top Advertising Markets of Origin for 2013 Overnight Piedmont Region Visitors VS. North Carolina Visitors**

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<i>DMA of Origin</i>	<i>Percent of Total Visitors to Piedmont Region</i>	<i>Percent of Total Visitors to North Carolina</i>
Raleigh-Durham (Fayetteville)	11.6%	13.0%
Charlotte	10.7%	9.0%
Atlanta	5.5%	5.3%
Greensboro-High Point-Winston Salem	5.4%	6.3%
Greenville-Spartanburg-Asheville	5.3%	4.5%
New York	4.2%	4.2%
Columbia	3.6%	2.2%
Washington DC (Hagerstown, MD)	3.5%	4.0%
Greenville-New Bern-Washington	3.0%	3.5%
Roanoke-Lynchburg	2.7%	1.6%
Philadelphia, PA	2.6%	2.0%
Wilmington	2.3%	2.4%
Orlando-Daytona Beach-Melbourne	1.6%	1.7%
Cleveland-Akron	1.5%	1.2%
Chicago	1.5%	1.3%
Pittsburgh	1.3%	1.3%
Baltimore	1.2%	0.9%
Harrisburg-Lancaster-Lebanon-York	1.2%	0.9%
Hartford-New Haven	1.0%	0.7%

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

## 2013 Domestic Mountain Region Travel

### Summary

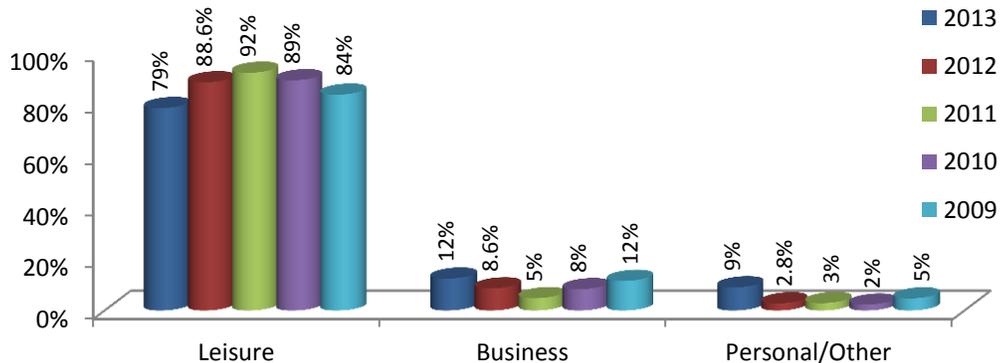
- ◆ In 2013, twenty-two percent of North Carolina visitors traveled to North Carolina’s Mountain Region, approximately 11.3 million person-trips. For marketing purposes, the Mountain Region is made up of the 23 western-most counties of North Carolina.
- ◆ Seventy-nine percent of domestic visitors came to the Mountain Region for pleasure purposes, while twelve percent of visitors came to conduct business (includes meeting/convention). The remaining nine percent reported “other” purpose of visit.
- ◆ Travel to the Mountain Region of North Carolina was heaviest in the summer and fall. The summer (June – August) had the highest proportion of visitors, with thirty-four percent of all 2013 Mountain Region visitors. The fall (September - November) followed with twenty-eight percent of visitors, followed by spring (March - May) with twenty-two percent and winter (December - February) with sixteen percent. July was the single largest month for mountain travel with more than thirteen (13.5%) percent.
- ◆ Overnight visitors to the Mountain Region spent an average of 2.5 nights in the region, down from 2.8 in 2012.
- ◆ Fifty-five percent of Mountain Region visitors lodged in a hotel/motel while thirty-three percent stayed at a private home. Five percent stayed in an RV park/campground, up from three percent in 2012.
- ◆ The average travel party size for all Mountain Region visitors was 2.0 people. Twenty-one percent of all travel parties to the region included children in the party.
- ◆ Ninety-three percent of overnight travelers to the Mountain Region drove (includes personal automobile, rental vehicle, RV/camper), while four percent traveled by air.
- ◆ In 2013, the average trip expenditure in the Mountain Region was \$443. The average trip expenditure for overnight visitors to the Mountain Region was \$577. Daytrip parties to the Mountain Region spent approximately \$140 per visit.
- ◆ The top states of origin of *overnight* visitors to the Mountain Region were North Carolina (37.2%), South Carolina (12.1%), Georgia (10.2%), Tennessee (8.8%), and Florida (7.9%).
- ◆ Sixty-two percent of the households that traveled to North Carolina’s Mountain Region in 2013 had a household income over \$50,000.
- ◆ In 2013, Charlotte (10.8%) was the top DMA of origin for *overnight* travelers to the Mountain Region, followed by Raleigh/Durham/Fayetteville (10.4%), Greenville/Spartanburg/Anderson, SC/Asheville (9.3%), Atlanta (8.4%), and Greensboro/High Point/Winston-Salem (8.0%).

## Mountain Region Overnight Visitor Profile

### Main Purpose of Visit

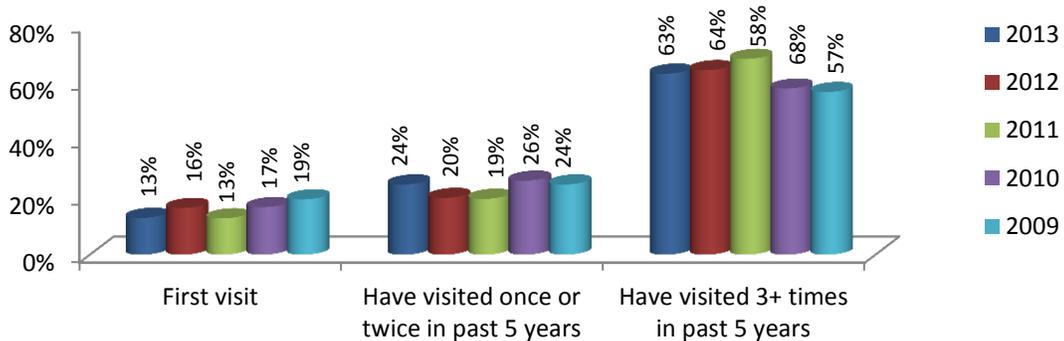
In 2013, more than three-quarters (78.6%) of domestic overnight visitors came to the Mountain Region for leisure purposes, which included visiting friends and relatives, outdoor recreation and entertainment/sightseeing, a decrease from 89% in 2012. Twelve percent of domestic overnight visitors came for general business, convention, seminar or other group meeting, an increase from 9% in 2012 and 5% in 2011. Nine percent traveled to the Mountain Region to conduct “other” business.

**2013 Primary Purpose of Overnight Trip to North Carolina's Mountain Region**



The proportion of first time visitors to North Carolina’s Mountain Region decreased from 16% to 13% from 2012 to 2013, though the majority of visitors (63%) still have visited more than three times in the past five years.

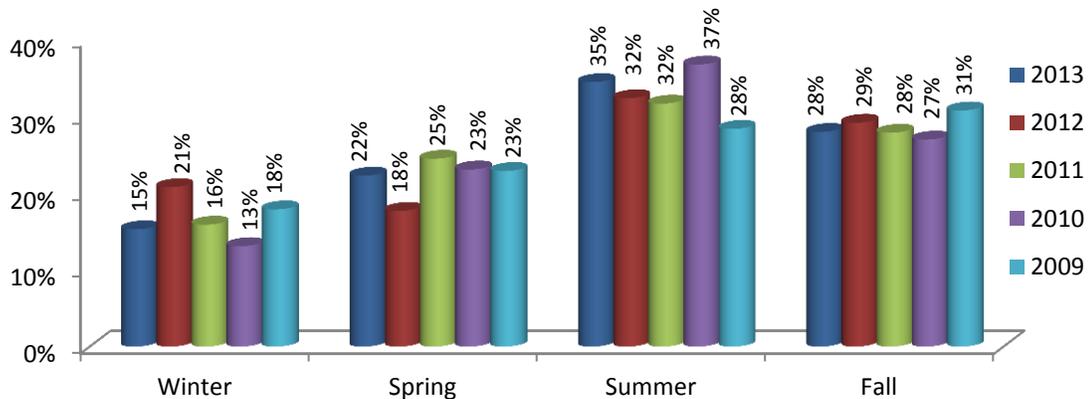
**2013 First Time vs. Repeat Visitors to North Carolina's Mountain Region**



## Travel Volume by Season

When examining visitation based on the typical seasonal schedule, the summer, (June through August) with nearly thirty-five percent, was the most popular season of the year for overnight travel to North Carolina’s Mountain Region. The fall (September through November) was next with twenty-eight percent, followed by spring (March through May) with twenty-two percent and winter (December through February) with fifteen percent.

**2013 Overnight Travel by Season to North Carolina's Mountain Region**



## Average Length of Stay

In 2013, an average of 2.5 nights was spent by visitors to North Carolina’s Mountain Region, a decrease from 2.8 nights in 2012. Data indicates that out-of-state visitors stay an average of 2.7 nights, while in-state visitors stay an average of 2.1 nights.

## Travel Party Size

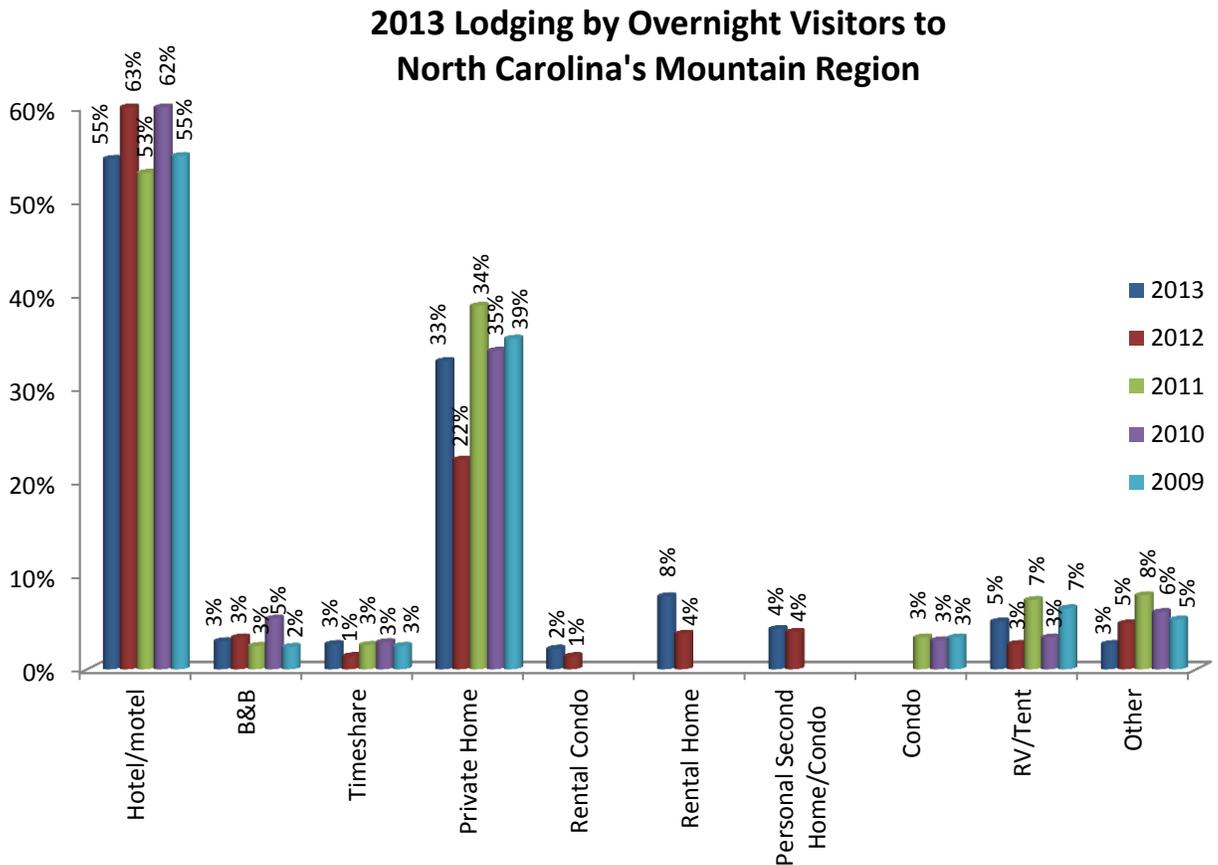
The average travel party size for Mountain Region overnight visitors was 2.0 people. This average has remained consistent as the last three years.

## Children on Trip

Twenty-one percent of overnight visitor parties to the Mountain Region included children. Among those who traveled with children, the average number of children on trips was 1.8.

## Lodging Used in Mountain Region

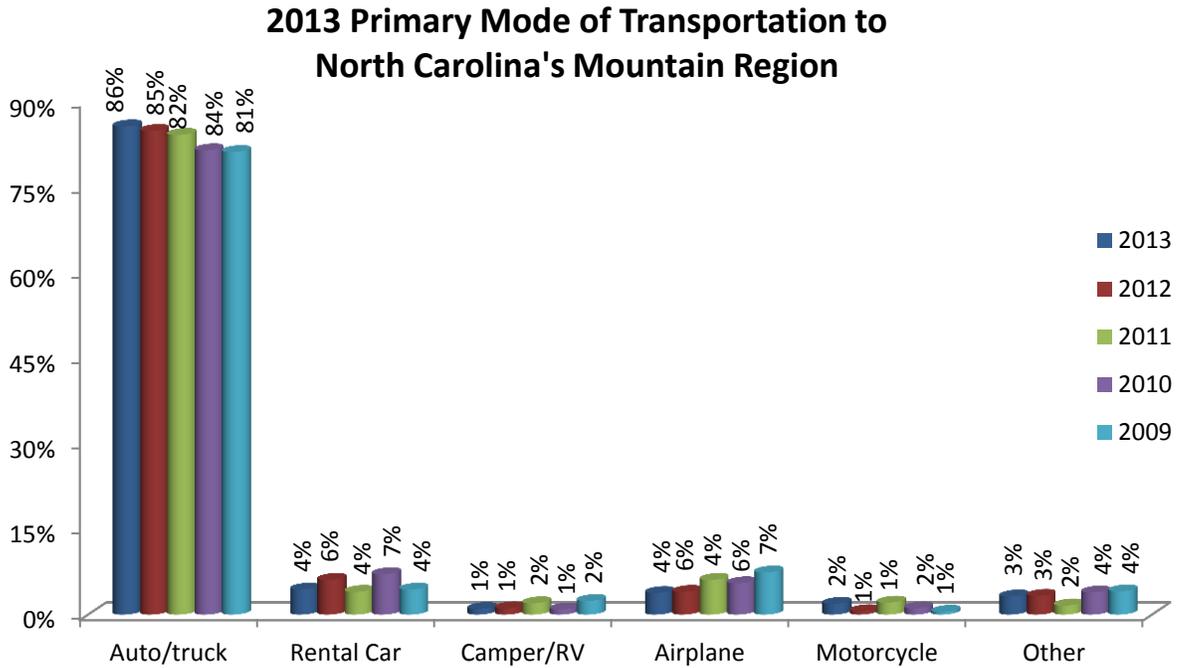
In 2013, more than half of Mountain Region visitors stayed in a hotel/motel (55%). Thirty-three percent lodged in a private home and five percent stayed in a RV/Tent. Note that in 2012 the lodging categories changed to better reflect the use of rental homes/condos and personal second homes/condos, therefore comparisons between lodging categories before 2012 should be made with caution.



\*percentages do not add to 100% due to multiple responses.

## Mode of Transportation

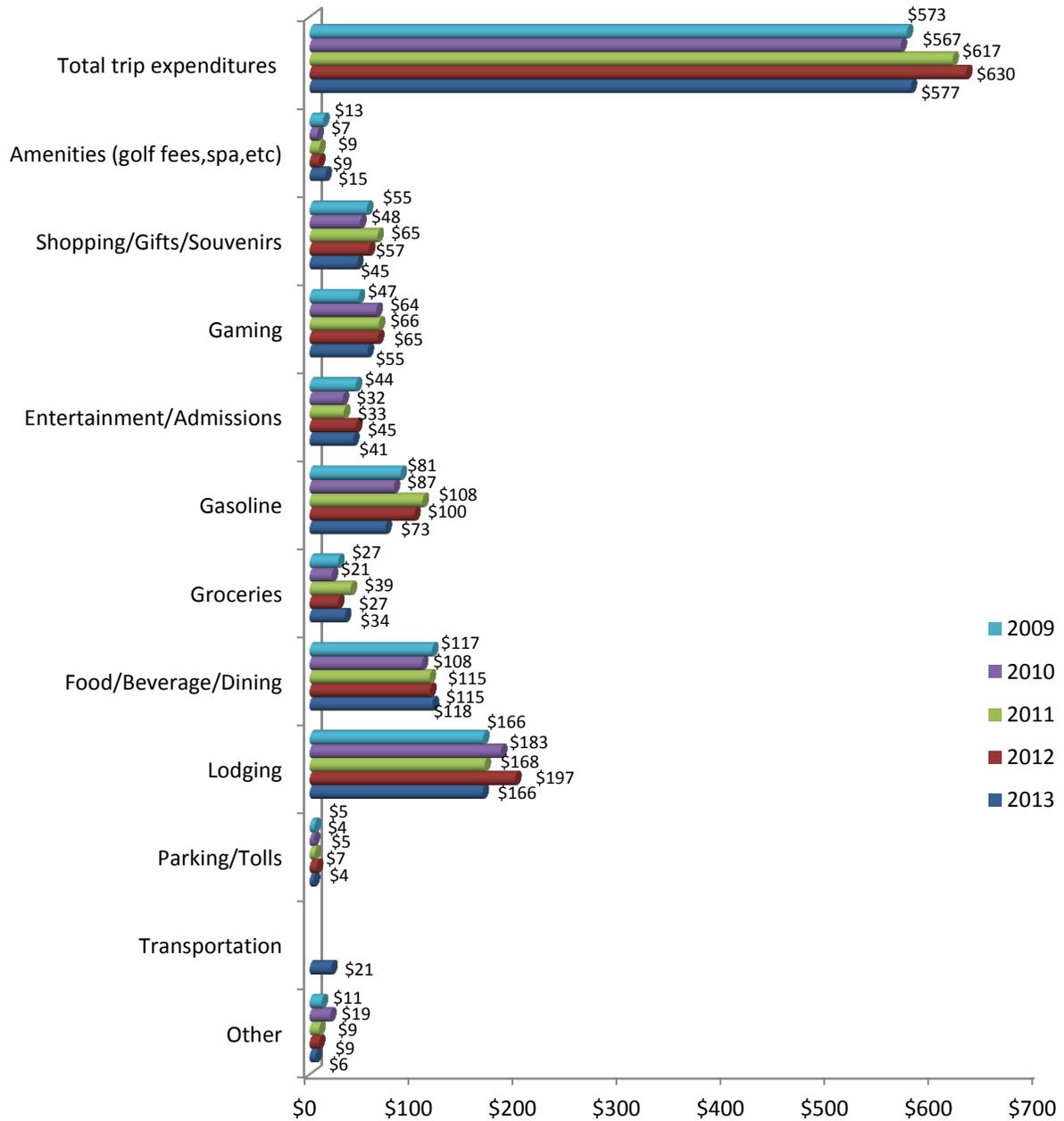
In 2013, the personal auto was by far the dominant form of transportation (86%) to the Mountain Region, while four percent traveled by air.



## Amount Spent in Mountain Region

The average overnight visitor party spending in the Mountain Region was \$577, down from 2012, but when accounting for the decrease in length of stay, daily spending increased 2.5%.

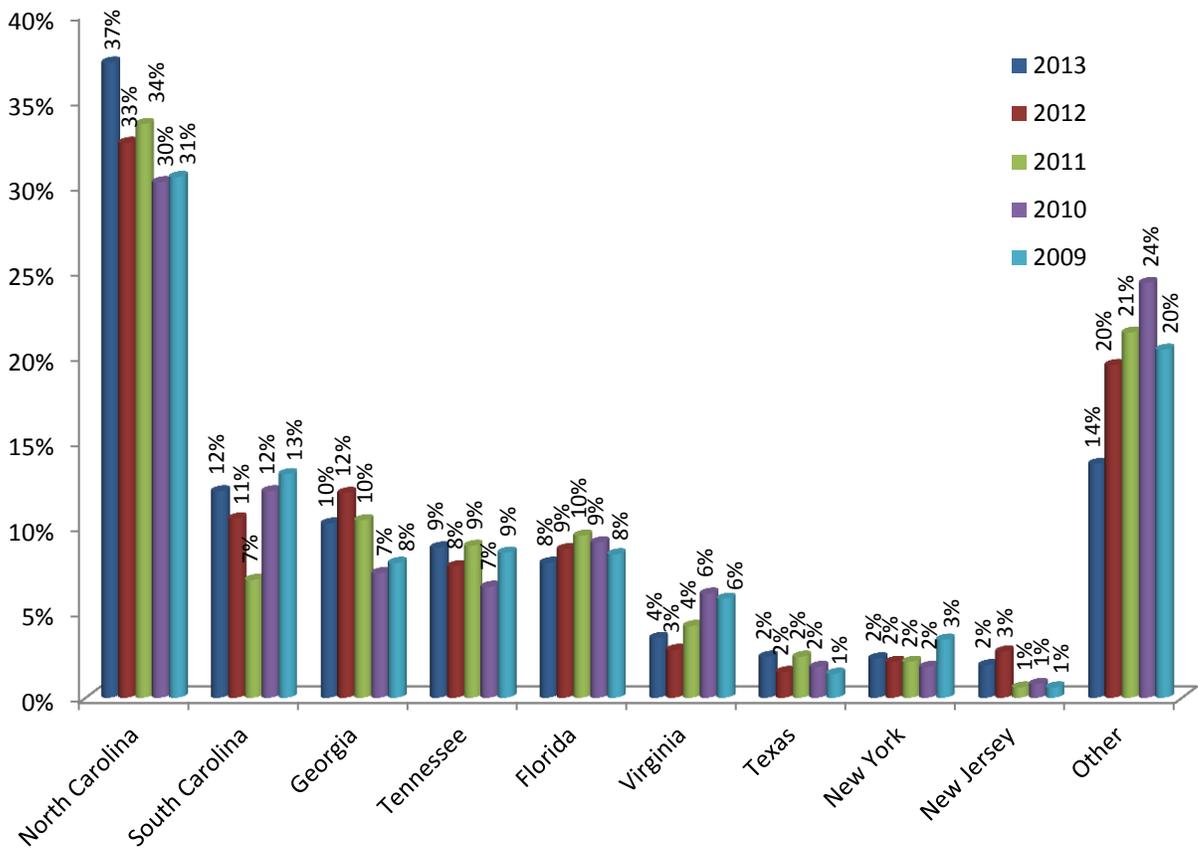
### 2013 Average Spending by Overnight Visitor Parties in North Carolina's Mountain Region



## Origin of Visitors

In 2013, the top states of origin for Mountain Region overnight visitors included North Carolina (37%), South Carolina (12%), Georgia (10%), Tennessee (9%) and Florida (8%). The proportion of in-state overnight visitors increased from just below thirty-three percent in 2012 to more than thirty-seven percent in 2013. As well, the proportion of visitors from South Carolina, Tennessee and Virginia increased in 2013.

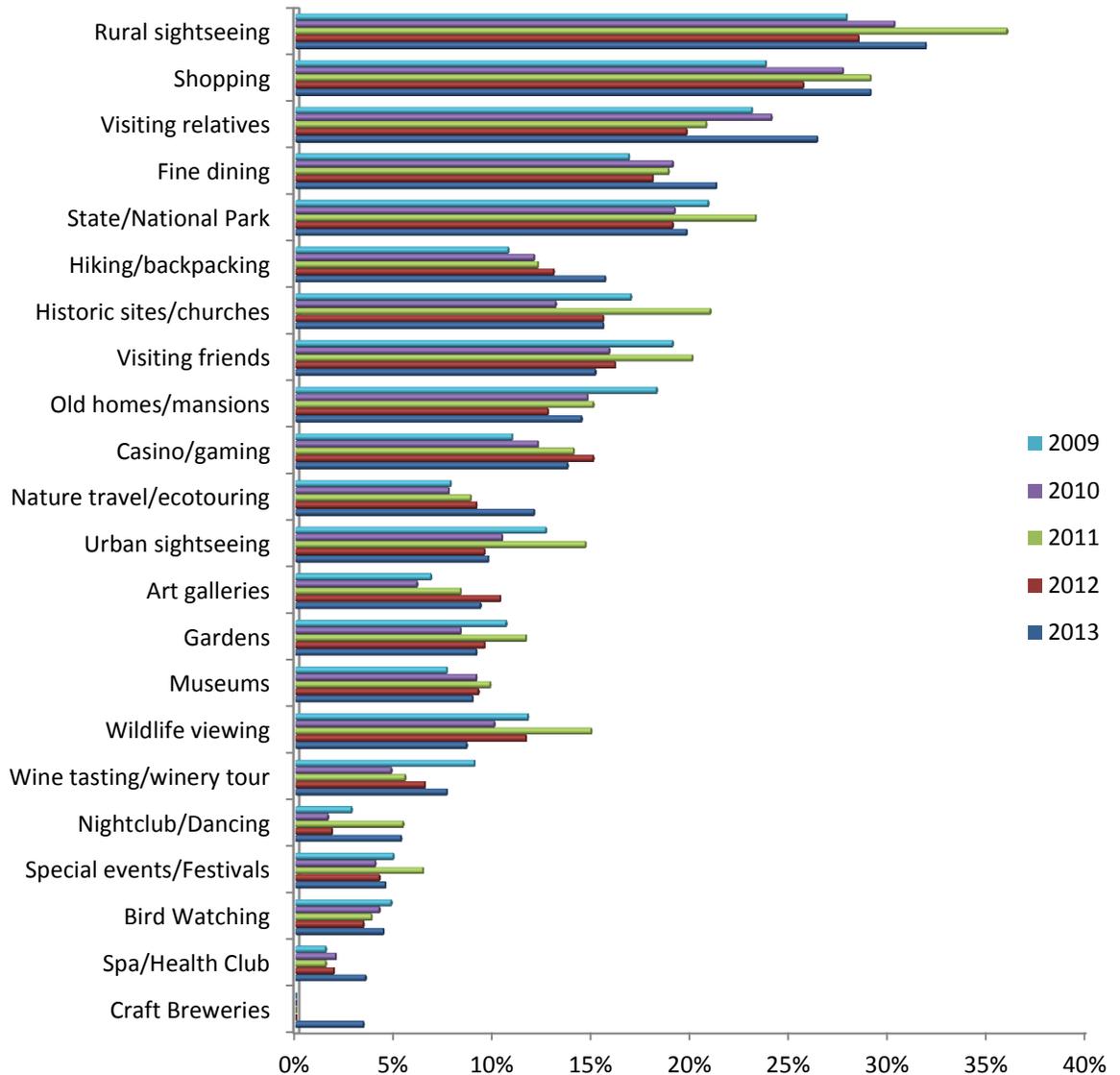
**2013 Top States of Origin of Overnight Visitors to North Carolina's Mountain Region**



## Activities

The following chart provides activities participated in by Mountain Region visitors. These are not indicative of purpose of trip, but a glimpse at what visitors enjoy doing while in North Carolina. The proportion of Mountain Region visitors who participated in rural sightseeing (32% in 2013 vs. 28% in 2012), shopping (29% in 2013 vs. 26% in 2012) and visiting relatives (26% in 2013 vs. 20% in 2012) increased from 2012-2013. ***\*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.***

**2013 Activities Participated in by Overnight Visitors to North Carolina's Mountain Region**



## **2013 Demographic Profile of North Carolina Overnight Visitors to the Mountain Region**

Nearly two-thirds of North Carolina Mountain Region overnight visitors (65%) are married, while thirteen percent of the region's visitors are divorced, widowed or separated.

The largest proportion of North Carolina Mountain Region overnight visitors classify themselves as white (90.8%), and just nearly three (2.6%) percent classify themselves as black/African American.

More than two-thirds (69%) of Mountain Region overnight visitor parties have a household head with a college degree or higher. The average Mountain Region visitor is 49 years old, with over half (63%) being 45 years old or older.

Forty percent of the overnight visitor parties that traveled to North Carolina's Mountain Region in 2013 had a household income \$75,000 or over. Thirteen percent had a household income of over \$125,000.

## 2013 Top Advertising Markets

In 2013, the top advertising markets sending overnight visitors to **North Carolina’s Mountain Region** were Charlotte (10.8%), Raleigh/Durham (10.4%), Greenville-Spartanburg-Asheville-Anderson (9.3%), Atlanta (8.4%), and Greensboro-High Point-Winston Salem (8.0%). As compared to 2012, there was positive growth for the Mountain Region from the Raleigh/Durham market, as well as the Greensboro-High Point-Winston Salem, Tri-Cities TN-VA and Charleston markets. Advertising markets correspond with Nielsen’s Designated Market Areas (DMAs).

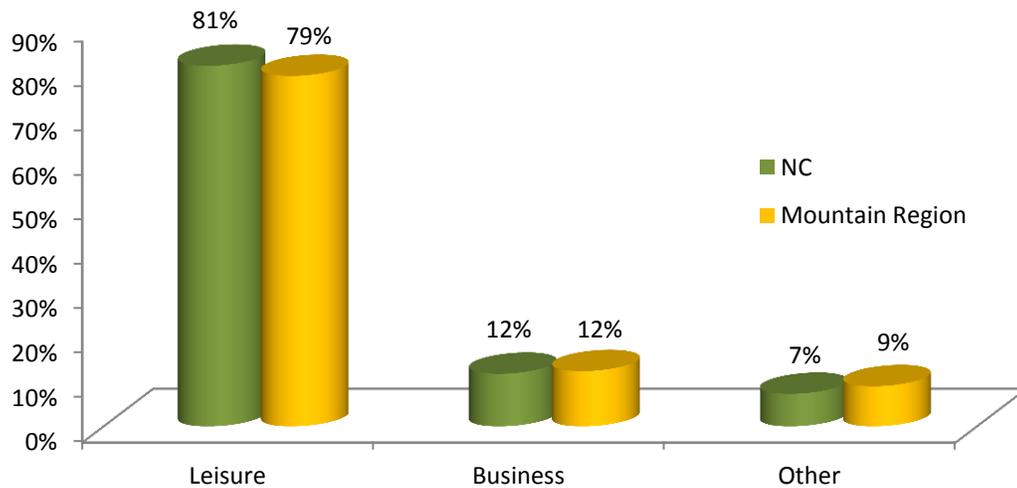
### Top Advertising Markets of Origin for Overnight Mountain Region Visitors

<i>DMA of Origin</i>	<i>2013 % of Total NC Visitors to Region</i>	<i>2012 % of Total NC Visitors to Region</i>	<i>2011 % of Total NC Visitors to Region</i>	<i>2010 % of Total NC Visitors to Region</i>	<i>2013 Mountain Share of Visitors from DMA</i>	<i>2012 Mountain Share of Visitors from DMA</i>	<i>2011 Mountain Share of Visitors from DMA</i>	<i>2010 Mountain Share of Visitors from DMA</i>
Charlotte	10.8%	14.8%	10.4%	10.6%	21.0%	26.8%	18.7%	20.2%
Raleigh-Durham (Fayetteville)	10.4%	6.5%	9.8%	10.8%	14.0%	10.5%	14.4%	13.4%
Greenville-Spartanburg-Asheville-Anderson	9.3%	10.3%	5.0%	6.5%	36.2%	37.1%	22.8%	25.3%
Atlanta	8.4%	9.1%	7.9%	5.7%	27.7%	33.3%	24.6%	22.2%
Greensboro-High Point-Winston Salem	8.0%	7.1%	8.6%	6.5%	22.2%	18.6%	21.2%	17.8%
Tri-Cities, TN-VA	4.0%	2.0%	2.3%	2.6%	53.8%	72.7%	40.0%	52.9%
Charleston, SC	3.4%	0.9%	1.1%	1.1%	49.6%	15.0%	33.3%	15.4%
New York	3.2%	4.1%	1.6%	2.5%	13.3%	18.4%	6.5%	9.1%
Orlando-Daytona Beach-Melbourne	3.0%	2.7%	1.6%	0.8%	30.9%	34.5%	17.6%	7.0%
Chattanooga	2.4%	1.2%	1.4%	1.4%	60.0%	40.0%	41.7%	62.5%
Tampa-St. Petersburg (Sarasota)	2.0%	2.5%	3.6%	3.5%	20.6%	21.3%	29.5%	27.3%
Knoxville	1.9%	2.2%	5.3%	2.6%	55.4%	32.0%	33.3%	34.6%
Washington, DC	1.5%	0.0%	1.2%	1.9%	6.6%	0.0%	7.0%	8.0%
Nashville	1.5%	2.2%	1.9%	1.2%	37.5%	61.5%	46.7%	33.3%
Cleveland-Akron (Canton)	1.4%	0.2%	1.4%	0.0%	20.4%	3.6%	17.2%	0.0%
Philadelphia	1.3%	0.4%	0.3%	1.2%	11.4%	6.9%	2.4%	7.0%
Greenville-New Bern-Washington	1.3%	1.0%	2.1%	0.6%	6.5%	5.6%	8.1%	2.4%
Miami-Ft. Lauderdale	1.2%	1.1%	1.3%	0.8%	35.0%	28.6%	33.3%	23.1%
Wilmington	1.1%	0.6%	0.8%	1.3%	8.0%	8.7%	7.3%	9.3%

## 2013 Mountain Region versus North Carolina

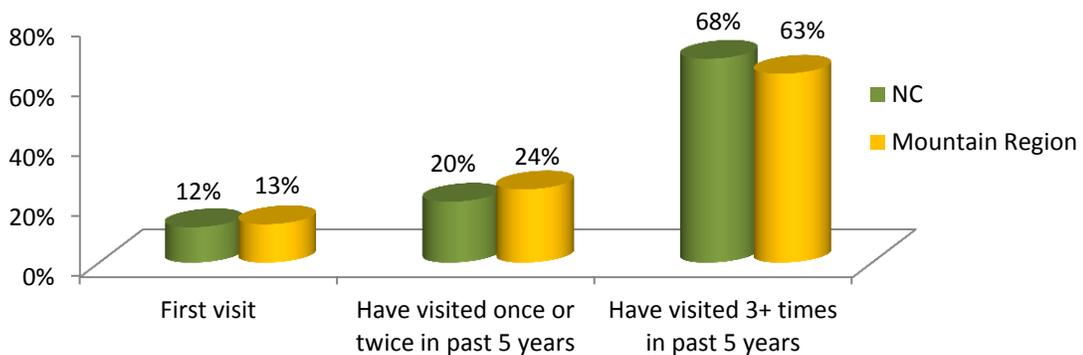
North Carolina’s Mountain Region had a slightly smaller share of visitors travel to the region for leisure reasons than North Carolina as a state (81% North Carolina vs. 79% Mountain Region).

### 2013 Primary Purpose of Trip North Carolina vs. Mountain Region



The Mountain Region welcomed a similar proportion of first time visitors in 2013 as the state in general.

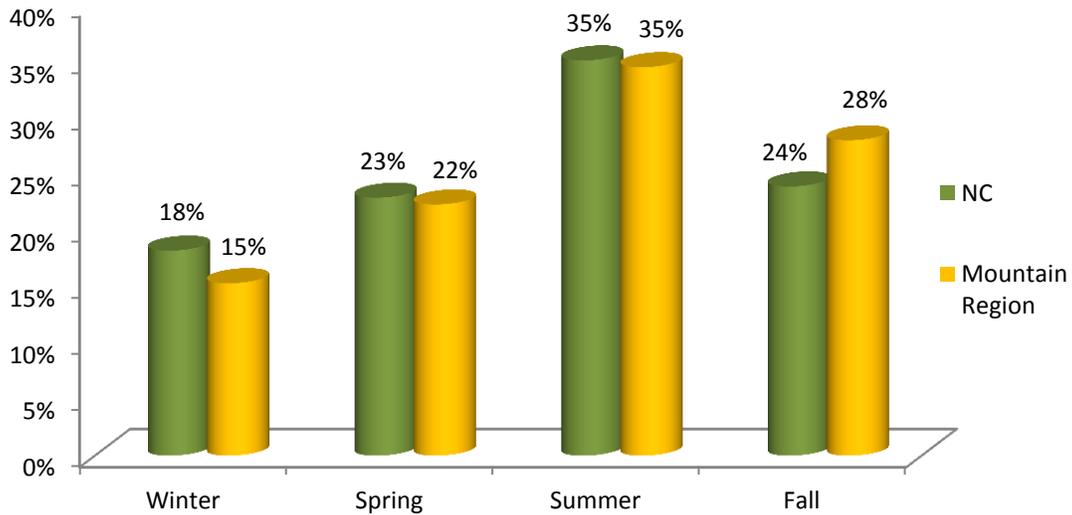
### 2013 First Time vs. Repeat Visitors North Carolina vs. Mountain Region



## Travel Volume by Season

In 2013, the summer season (June through August) was the top season of travel to both the Mountain Region and the state. The fall season for the Mountain Region had a higher percentage of overnight visitors than North Carolina as a whole, while North Carolina had a higher percentage of visitors in the winter and spring.

**2013 Season of Travel  
North Carolina vs. Mountain Region**



## Average Length of Stay

In 2013, an average of 2.5 nights was spent by visitors to North Carolina’s Mountain Region, while the North Carolina overnight visitor stayed an average of 2.7 nights.

## Travel Party Size

The average travel party size for all Mountain Region overnight visitors was 2 people, slightly larger than the average party size of the North Carolina visitor party (1.9).

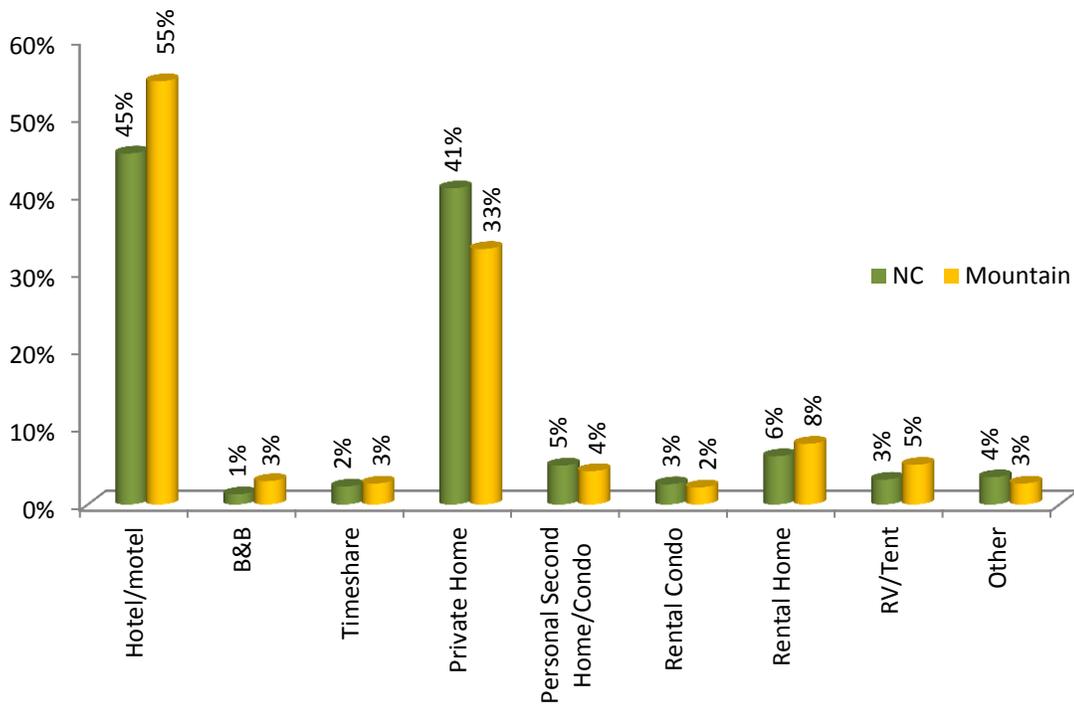
## Children on Trip

Twenty-one percent of overnight visitor parties to the Mountain Region included children in the party, while twenty-three percent of visitors to the state included children.

## Lodging Type

Both Mountain Region overnight visitors and North Carolina visitors in general are more likely to stay in hotel/motel or a private home than other types of lodging. However, Mountain Region visitors have a higher proportion for hotel/motel (45% North Carolina vs. 55% Mountain Region).

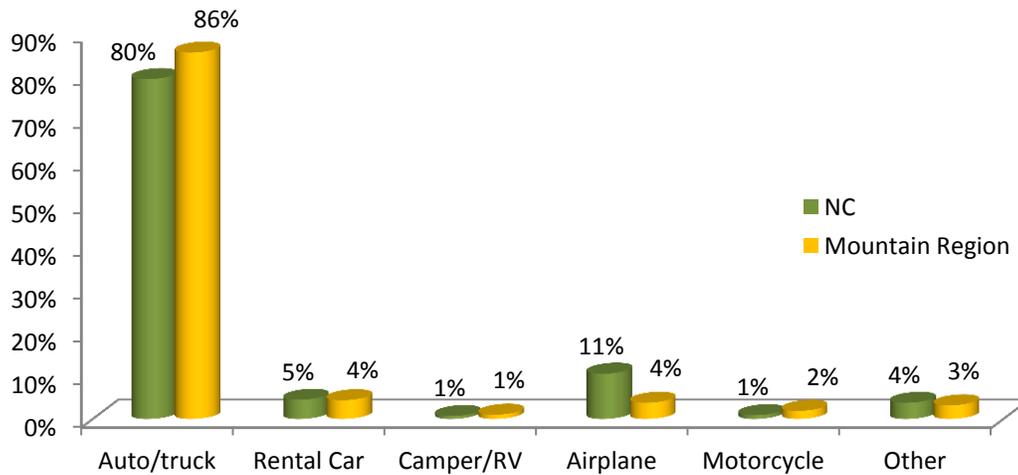
**2013 Lodging by Overnight Visitors to North Carolina vs. Mountain Region**



## Mode of Transportation

A higher percentage of travelers to the Mountain Region drove to their destination than all North Carolina visitors (80% North Carolina vs. 86% Mountain Region), while a higher percentage of travelers to North Carolina flew to their destination than Mountain Region visitors (11% North Carolina vs. 4% Mountain Region).

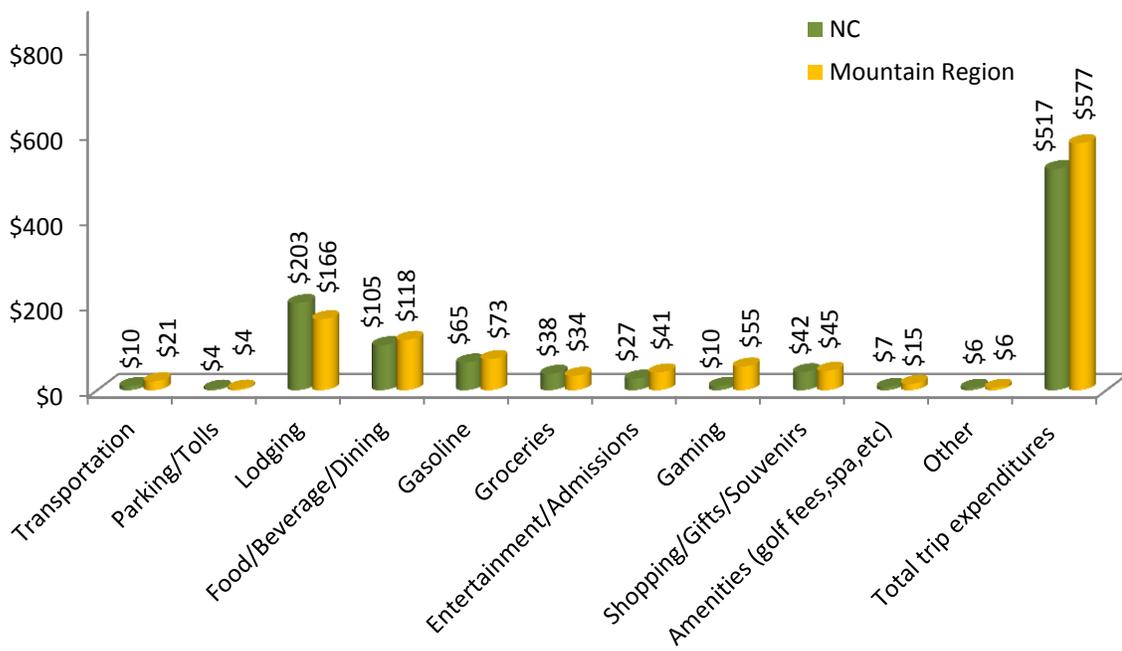
**2013 Primary Transportation by Overnight Visitors  
North Carolina vs. Mountain Region**



## Amount Spent in Mountain Region

The average overnight visitor party spending in the Mountain Region was \$577, \$60 higher than the state average party spending of \$517. Mountain Region visitors spent more on average on food/beverage, gasoline, gaming, entertainment, shopping and amenities.

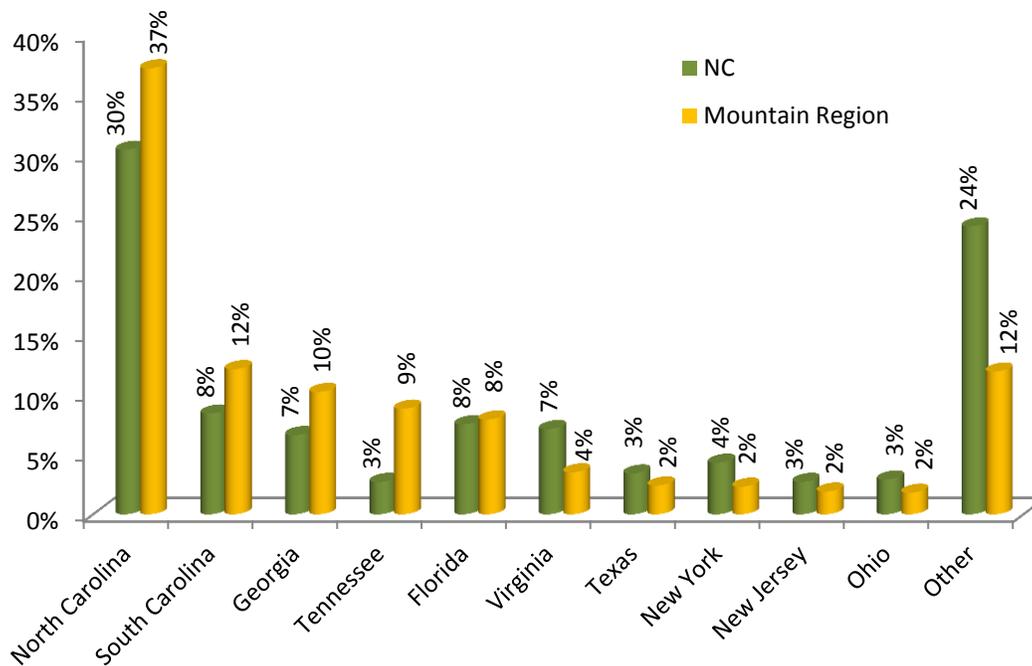
**2013 Average Spending by Overnight Visitor Parties  
North Carolina vs. Mountain Region**



## Origin of Overnight Visitors

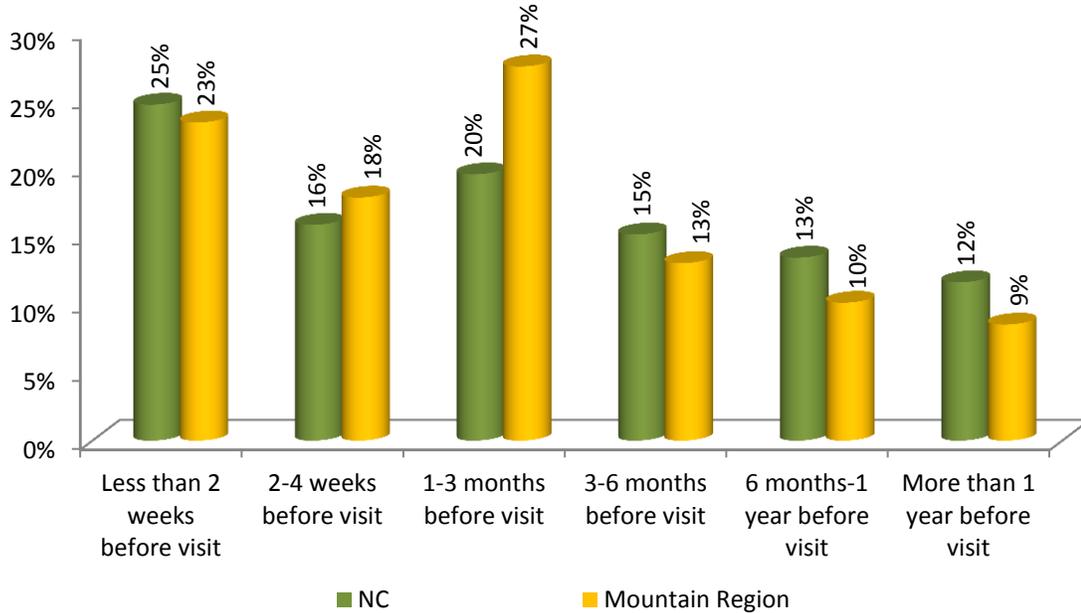
In 2013, the state saw a higher percentage of visitors from Virginia, Texas, New York, New Jersey and Ohio than the Mountain Region; while the Mountain Region saw a larger proportion of in-state visitors and visitors from Georgia, South Carolina, Tennessee, and Florida.

**2013 Top States of Origin of Overnight Visitors  
North Carolina vs. Mountain Region**



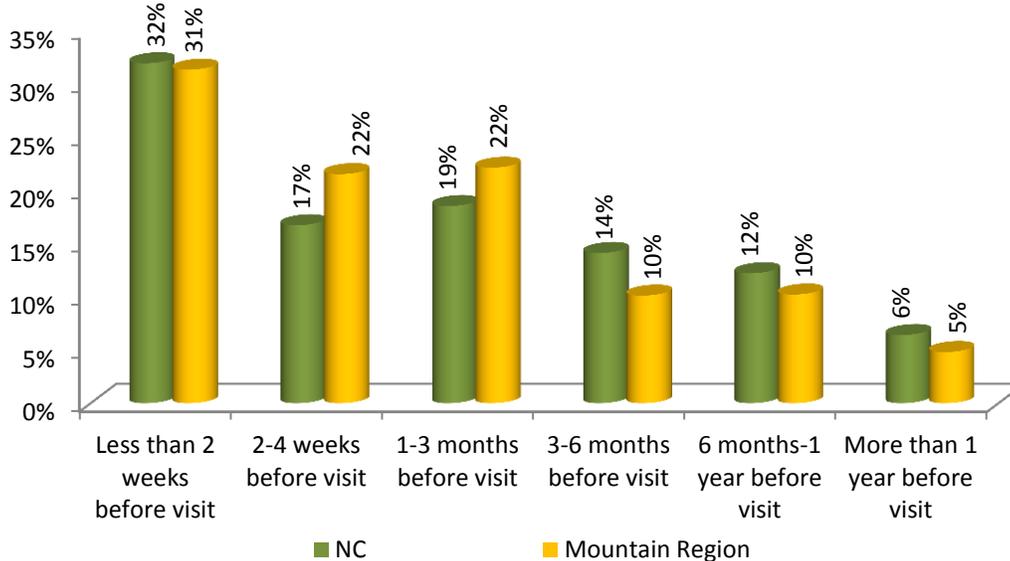
Trip Planning

2013 Length of Time to Consider NC as Travel Destination



Mountain Region visitors have similar lead times for consideration and decision of travel to North Carolina visitors in general. Twenty-four percent of Mountain Region visitors considered the state less than two weeks ahead of travel, but nearly twenty percent considered the visit more than six months prior to travel. Decisions to make travel for Mountain Region visitors and NC visitors in general were very similar.

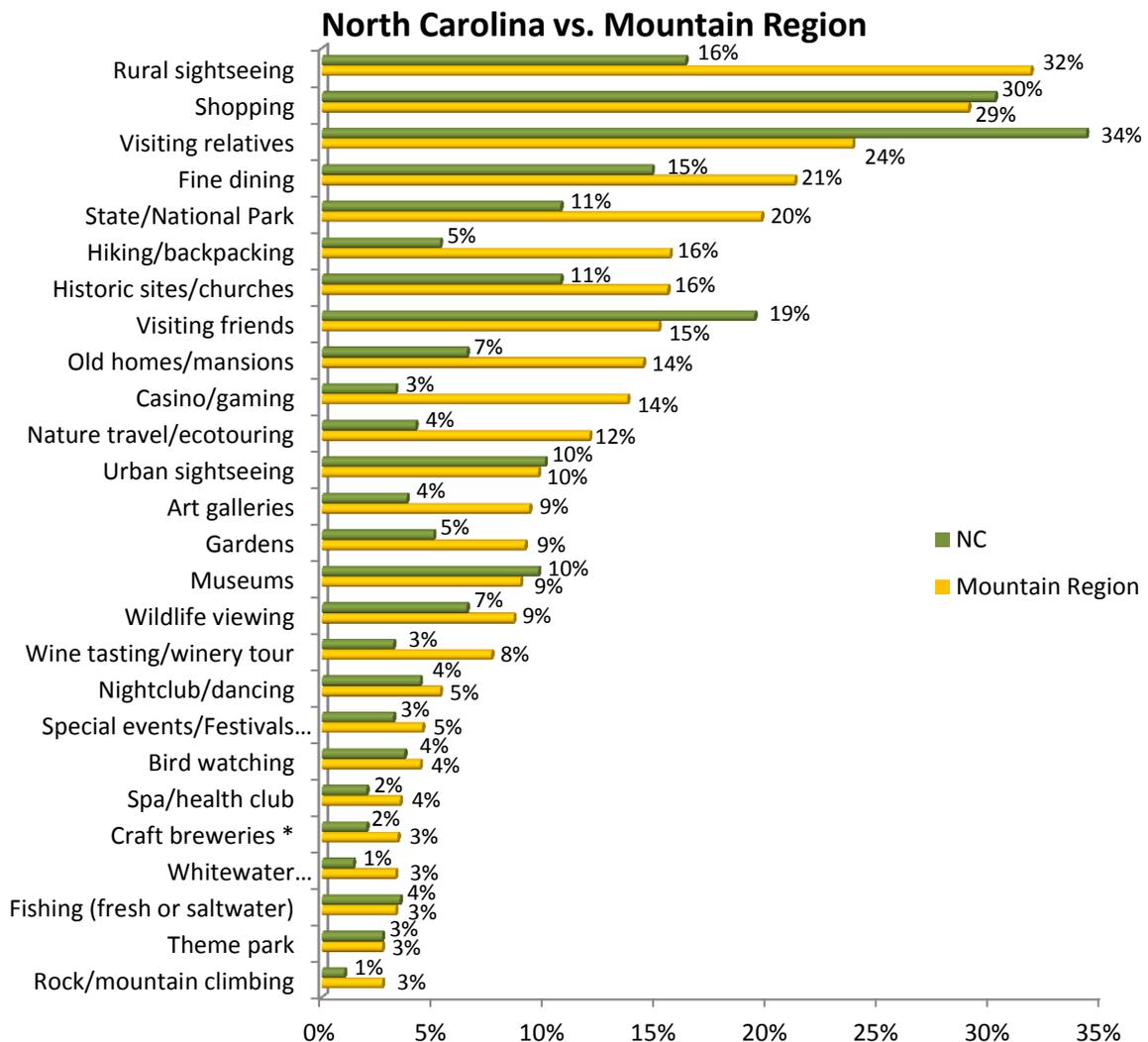
2013 Length of Time Decide on NC as Travel Destination



## Activities

Compared to all North Carolina overnight travelers, visitors to the Mountain Region participated in a greater number of activities while visiting the state. The region had a larger share of visitors participate in rural sightseeing (16% North Carolina vs. 32% Mountain Region), fine dining (15% North Carolina vs. 21% Mountain Region), and visiting a state/national park (11% North Carolina vs. 20% Mountain Region). Other activities that were more popular for Mountain Region visitors were gaming, hiking/backpacking, visiting old homes and historic churches, and wildlife viewing, among many others. **\*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.**

### 2013 Activities Participated in by Overnight Visitors



## 2013 Demographic Profile for Overnight Visitor Parties to the Mountain Region

	<b>North Carolina</b>	<b>Mountain Region</b>
<b>Average age of household head</b>	47.9 years of age	49.0 years of age
<b>Education of Household Head</b>		
High school or less	12.7%	14.3%
Some college - no degree	21.5%	17.2%
Completed college	44.1%	47.2%
Post Graduate College	21.7%	21.3%
<b>Annual Household Income</b>		
Less than \$25,000	16.0%	14.4%
\$25,000-\$49,999	22.9%	23.8%
\$50,000-\$74,999	21.0%	21.7%
\$75,000 & over	40.1%	40.0%
<b>Marital Status</b>		
Married	57.5%	64.6%
Never married	20.1%	12.5%
Divorced, widowed, separated	22.4%	23.0%
<b>Ethnicity</b>		
White	83.3%	90.8%
Black/African American	11.1%	2.6%
Asian or Pacific Islander	2.1%	3.8%
Other	3.5%	2.8%

## 2013 Top Advertising Markets

While the top ten advertising markets sending visitors to North Carolina’s Mountain Region are similar to the top ten advertising markets for the state of North Carolina, the Mountain Region saw a larger proportion of visitors from Charlotte, Greenville/Spartanburg, Atlanta and Greensboro-High Point-Winston Salem.

### **Top Advertising Markets of Origin for 2013 Overnight Mountain Region Visitors VS. North Carolina Visitors**

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<b>DMA of Origin</b>	<b>Percent of Total Visitors to Mountain Region</b>	<b>Percent of Total Visitors to North Carolina</b>
Charlotte	10.8%	9.0%
Raleigh-Durham (Fayetteville)	10.4%	13.0%
Greenville-Spartanburg-Asheville	9.3%	4.5%
Atlanta, GA	8.4%	5.3%
Greensboro-High Point-Winston Salem	8.0%	6.3%
Tri-Cities, TN-VA	4.0%	1.3%
Charleston, SC	3.4%	1.2%
New York	3.2%	4.2%
Orlando-Daytona Beach-Melbourne	3.0%	1.7%
Chattanooga	2.4%	0.7%
Tampa-St. Petersburg, FL	2.0%	1.7%
Knoxville, TN	1.9%	0.6%
Washington, DC	1.5%	4.0%
Nashville	1.5%	0.7%
Cleveland-Akron	1.4%	1.2%
Philadelphia	1.3%	2.0%
Greenville-New Bern-Washington	1.3%	3.5%
Miami-Ft. Lauderdale	1.2%	0.6%
Wilmington	1.1%	2.4%

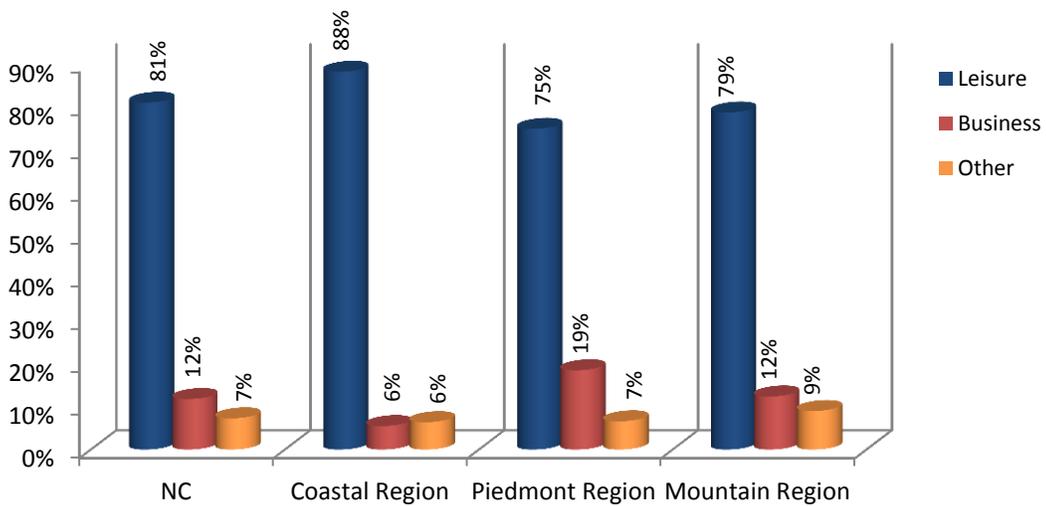
Note: Advertising markets defined by Nielsen’s Designated Market Area (DMA)

## 2013 Regional Comparison

The following section provides graphical representations of the three geographic regions together in order to offer comparisons and contrasts of the regions' visitors.

Not surprisingly, North Carolina's Coastal Region had a larger share of visitors travel to the region for leisure reasons than the Piedmont Region. The proportion of Mountain Region business travel increased from less than nine percent in 2012 to more than twelve percent in 2013.

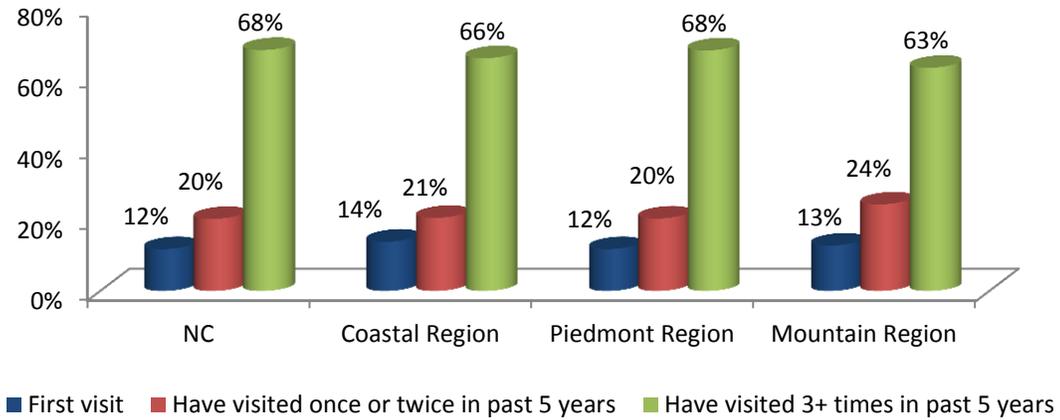
**2013 Primary Purpose of Trip by Region**



### First Time vs. Repeat Visitors

The majority of each region’s visitors are repeat visitors, though the Coastal Region saw a larger proportion of first time visitors than the other two regions and the state in 2013.

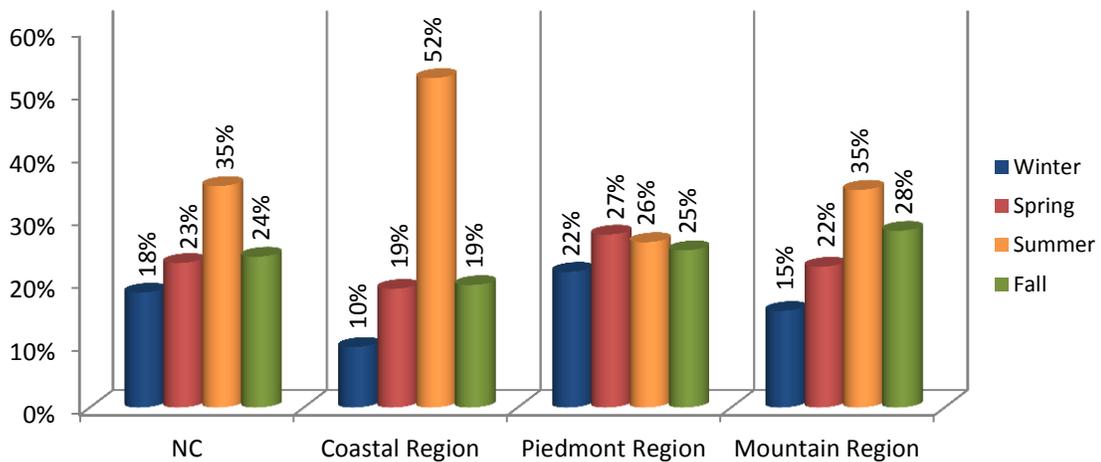
2013 First Time vs. Repeat Visitors by Region



### Travel Volume by Season

The seasonal distribution of regional visitors helps understand the flow of travelers through the state. The coastal region sees a larger proportion of total visitors during the summer; while the mountain region has a larger proportion of visitors during the summer and fall.

2013 Season of Travel by Region



**2013 North Carolina Regional Travel Summary –  
Coastal Region vs. Piedmont Region vs. Mountain Region**

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**Average Length of Stay**

<b>North Carolina</b>	<b>Coastal Region</b>	<b>Piedmont Region</b>	<b>Mountain Region</b>
2.7 nights	3.3 nights	2.7 nights	2.5 nights

**Travel Party Size**

<b>North Carolina</b>	<b>Coastal Region</b>	<b>Piedmont Region</b>	<b>Mountain Region</b>
1.9 people	2.1 people	1.8 people	2.0 people

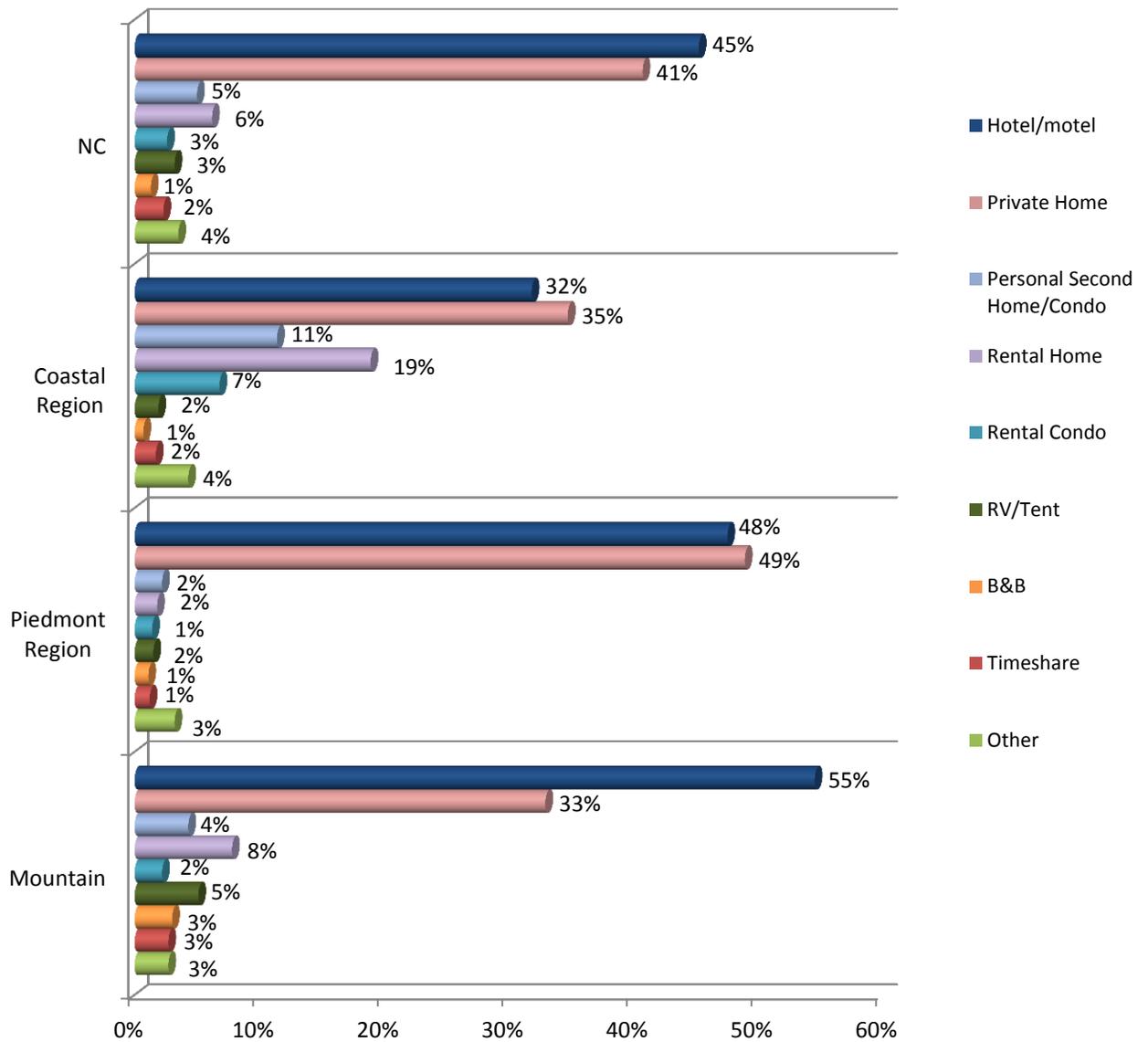
**Children on Trip**

<b>North Carolina</b>	<b>Coastal Region</b>	<b>Piedmont Region</b>	<b>Mountain Region</b>
23.2%	32.6%	21.8%	20.8%

## Lodging Type

Hotels/motels and private homes are the most popular forms of lodging throughout the state, though the proportions vary by region. Mountain Region visitors make use of hotels/motels while Coastal Region visitors tend to stay in rental homes and rental condos.

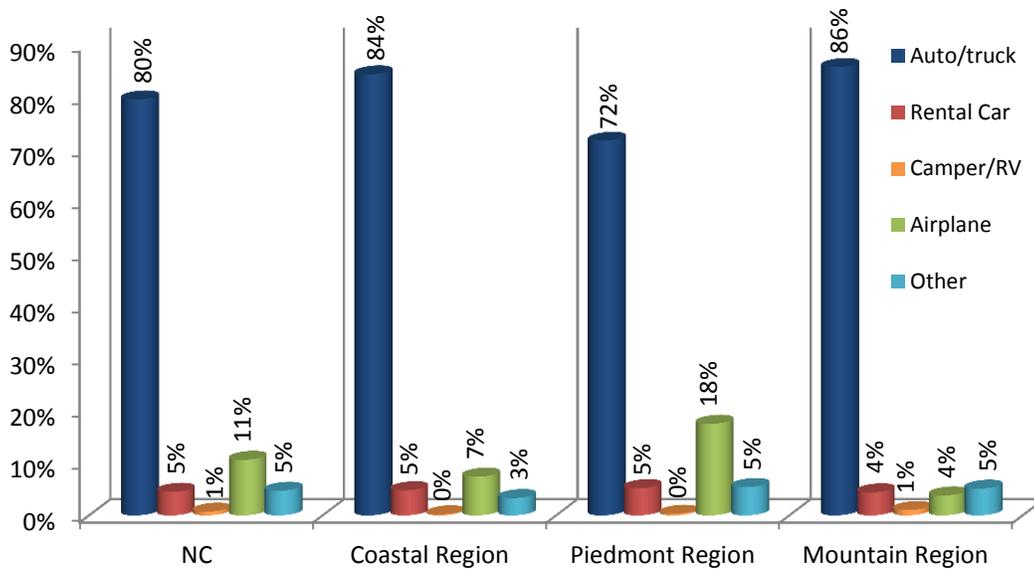
2013 Lodging by Overnight Visitors by Region



## Mode of Transportation

Not surprisingly, auto transportation was the primary use of travel by all of North Carolina visitors. The Piedmont Region, with the most and largest airports, saw the most travelers using air transportation (17.5%).

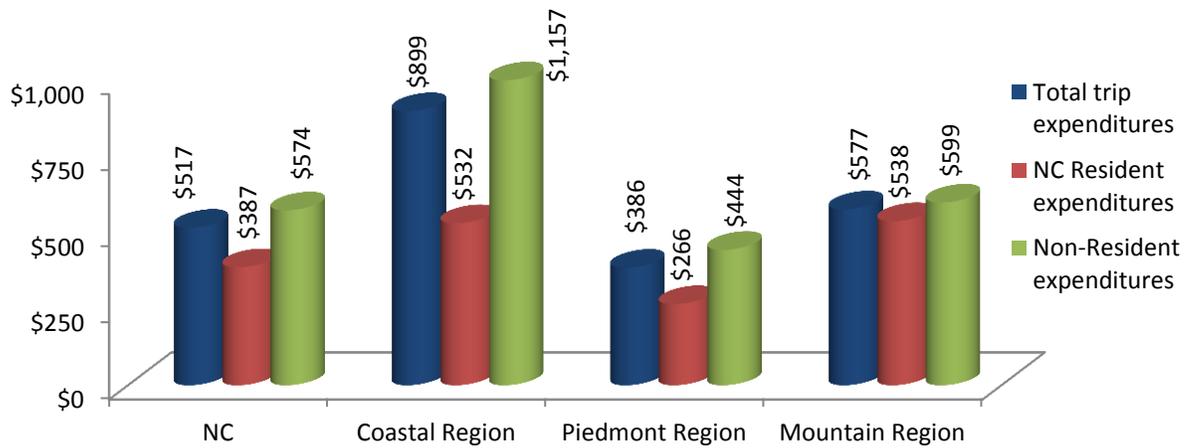
2013 Primary Transportation by Overnight Visitors  
by Region



### Trip Expenditures

Coastal Region visitor parties, on average, spend more than other regional visitors or NC in general. Visitor parties to this region tend to have a slightly longer length of stay and have a slightly larger travel party size, explaining some of the higher spending. Interesting to note though, NC resident Mountain Region visitors spend more than NC resident Coastal Region visitors on average.

**2013 Average Total Trip Spending by Overnight Visitor Parties by Region**



### Origin of Overnight Visitors

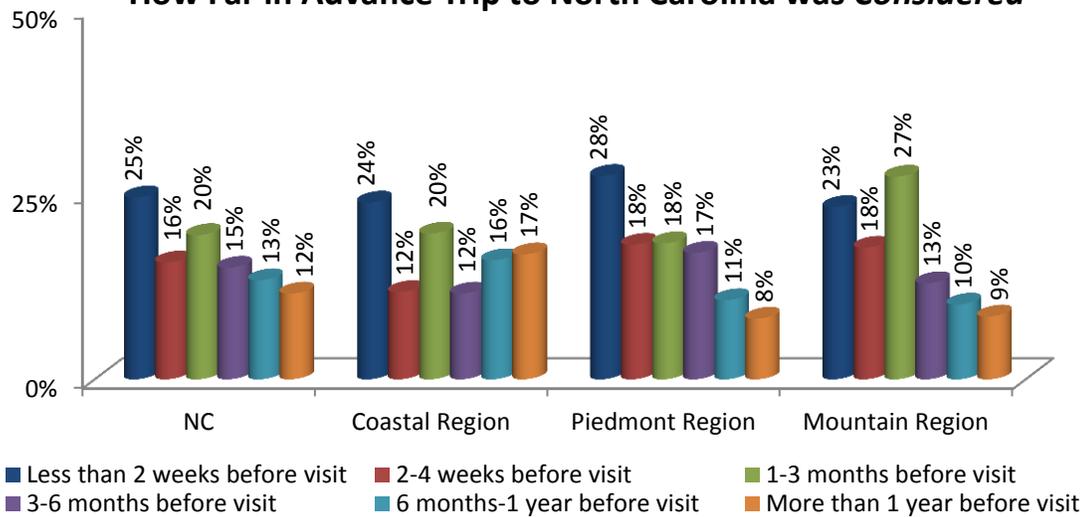
North Carolina is the top state of origin for all three regions of the state. In-state residents comprise around one-third of each region’s visitors. The other top states vary, though there is some overlap.

NC	Coastal Region	Piedmont Region	Mountain Region
North Carolina (30.4%)	North Carolina (40.1%)	North Carolina (33.4%)	North Carolina (37.2%)
South Carolina (8.4%)	Virginia (15.0%)	South Carolina (11.3%)	South Carolina (12.1%)
Florida (7.5%)	Pennsylvania (6.6%)	Georgia (7.3%)	Georgia (10.2%)
Virginia (7.1%)	New Jersey (4.7%)	Virginia (6.7%)	Tennessee (8.8%)
Georgia (6.6%)	Texas (4.5%)	New York (5.0%)	Florida (7.9%)

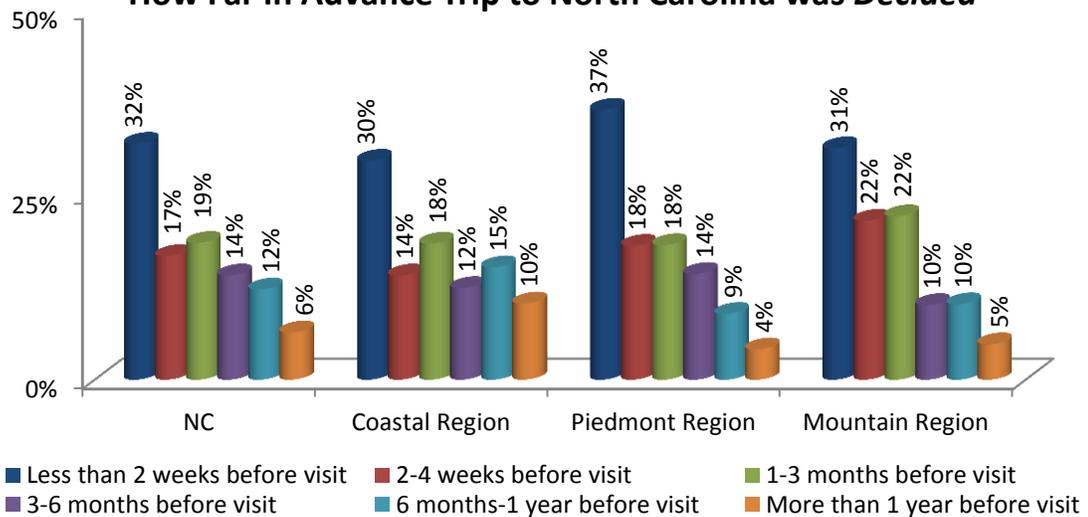
## Trip Planning

Visitors to the Coastal Region of North Carolina considered and planned travel to the state farther in advance than did visitors to the Mountain or Piedmont regions. Nearly twelve percent of visitors who eventually traveled overnight to the state began considering a trip to North Carolina over a year prior to the visit and nearly nineteen percent decided to travel to the state over six months prior to travel.

**How Far in Advance Trip to North Carolina was Considered**



**How Far in Advance Trip to North Carolina was Decided**



## 2013 North Carolina Regional Travel Summary –

### Coastal Region vs. Piedmont Region vs. Mountain Region

## Activities

Activities participated in by North Carolina overnight travelers in 2013 vary by region, but common activities between regions include visiting friends and relatives, shopping and sightseeing. Mountain region visitors participate in more activities per trip than other regions. **\*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.**

NC	Coastal Region	Piedmont Region	Mountain Region
Visiting relatives (34.4%)	Beach (72.4%)	Visiting relatives (40.3%)	Rural sightseeing (31.8%)
Shopping (22.2%)	Shopping (28.2%)	Shopping (20.3%)	Shopping (29.0%)
Visiting friends (19.4%)	Visiting relatives (30.7%)	Visiting friends (18.8%)	Visiting relatives (26.3%)
Beach (18.97%)	Visiting friends (23.8%)	Fine dining (14.8%)	Fine dining (21.2%)
Rural sightseeing (16.3%)	Rural sightseeing (17.3%)	Museums (9.4%)	State/ National park (19.7%)
Fine dining (14.8%)	Historic sites/ Churches (15.1%)	Rural sightseeing (8.8%)	Hiking/ Backpacking (15.6%)
Historic sites/ Churches (10.7%)	Fine dining (15.0%)	Urban sightseeing (8.2%)	Historic sites/ Churches (15.5%)
State/ National park (10.7%)	Museums (13.1%)	Nightclubs/ Dancing (6.6%)	Visiting friends (15.1%)
Urban sightseeing (10.0%)	State/ National park (13.0%)	Historic sites/ Churches (5.4%)	Old homes/ Mansions (14.4%)
Museums (9.7%)	Fishing (10.5%)	Art Galleries (4.4%)	Casino/ Gaming (13.7%)
Old homes/ Mansions (6.5%)	Wildlife viewing (9.0%)	State/ National park (4.2%)	Nature travel/ Eco-touring (12.0%)
Wildlife viewing (6.5%)	Urban sightseeing (7.3%)	Hiking/ Backpacking (3.6%)	Urban sightseeing (9.7%)
Hiking/ Backpacking (5.3%)	Nightclub/Dancing (5.6%)	Old homes/ Mansions (3.5%)	Art Galleries (9.3%)
Gardens (5.0%)	Bird watching (4.8%)	Special events/Festival (3.3%)	Gardens (9.1%)
Nightclub/Dancing (4.4%)	Old homes/ Mansions (4.8%)	Gardens (3.2%)	Museums (8.9%)
Nature travel/ Eco-touring (4.2%)	Golf (3.8%)	Spa/Health Club (2.9%)	Wildlife viewing (8.6%)
Art Galleries (3.8%)	Gardens (3.5%)	Musical Theater (2.7%)	Wine tasting/winery tour (7.6%)
Bird Watching (3.7%)	Biking (3.3%)	Theme Park (2.6%)	Nightclub/Dancing (5.3%)
Fishing (3.5%)	Motorboat/Jet ski (3.0%)	Theater/Drama (2.5%)	Special events/Festival (4.5%)
Casino/ Gaming (3.3%)	Art Galleries (2.9%)	Craft Breweries (2.2%)	Bird Watching (4.4%)
Special events/Festival (3.2%)	Hiking/ Backpacking (2.9%)	Golf (2.2%)	Spa/Health Club (3.5%)
Wine tasting/winery tour (3.2%)	Sailing (2.6)	Wildlife Viewing (2.0%)	Craft Breweries (3.4%)
Golf (3.0%)	Zoos (2.4%)	Youth/amateur/collegiate sporting events (2.0%)	Fishing (3.3%)
Theme Park (2.7%)	Nature travel/Eco-touring (2.3%)	Zoos (2.0%)	Whitewater rafting/kayaking (3.3%)
Biking (2.4%)	Wine tasting/winery tour (2.2%)	Biking (1.9%)	Rock/mountain climbing (2.7%)

**2013 North Carolina Regional Travel Summary –  
Coastal Region vs. Piedmont Region vs. Mountain Region**

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**2013 Demographic Profile for Overnight Visitor Parties**

	<b>North Carolina</b>	<b>Coastal Region</b>	<b>Piedmont Region</b>	<b>Mountain Region</b>
<b>Average age of household head</b>	47.9 years of age	46.5 years of age	45.9 years of age	49.0 years of age
<b>Education of Household Head</b>				
High school or less	12.7%	11.8%	11.4%	14.3%
Some college - no degree	21.5%	24.2%	22.9%	17.2%
Completed college	44.1%	43.6%	42.3%	47.2%
Post Graduate College	21.7%	20.4%	23.5%	21.3%
<b>Annual Household Income</b>				
Less than \$25,000	16.0%	11.4%	18.4%	14.4%
\$25,000-\$49,999	22.9%	21.2%	23.5%	23.8%
\$50,000-\$74,999	21.0%	20.5%	19.6%	21.7%
\$75,000 & over	40.1%	47.1%	38.6%	40.0%
<b>Marital Status</b>				
Married	57.5%	57.4%	53.2%	64.6%
Never married	20.1%	22.9%	23.4%	12.5%
Divorced, widowed, separated	22.4%	19.7%	23.4%	23.0%
<b>Ethnicity</b>				
White	83.3%	88.8%	77.6%	90.8%
Black/African American	11.1%	5.2%	17.1%	2.6%
Asian or Pacific Islander	2.1%	1.4%	2.1%	3.8%
Other	1.1%	4.6%	3.2%	2.8%

## 2013 Top Advertising Markets

The top ten advertising markets for the three regions are very similar, but differences can be noted in the ranks. While Raleigh-Durham is the primary market for the Coastal and Piedmont regions and the state in general, Charlotte is the primary market for the Mountain Region. The Georgia, Florida and Tennessee markets are most important to the Mountain Region while the Virginia market is very important to the Coastal Region.

NC	Coastal Region
Raleigh-Durham-Fayetteville (13.0%)	Raleigh-Durham-Fayetteville (20.4%)
Charlotte (9.0%)	Charlotte (7.3%)
Greensboro-High Point-Winston Salem (6.3%)	Greensboro-High Point-Winston Salem (6.2%)
Atlanta (5.3%)	Norfolk-Portsmouth-Newport News (6.1%)
Greenville-Spartanburg-Asheville (4.5%)	New York (6.0%)
New York (4.2%)	Greenville-New Bern-Washington (5.5%)
Washington, DC (Hagerstown, MD) (4.0%)	Washington, DC (Hagerstown, MD) (4.9%)
Greenville-New Bern-Washington (3.5%)	Pittsburgh (4.0%)
Wilmington (2.4%)	Richmond-Petersburg (4.0%)
Norfolk-Portsmouth-Newport News (2.3%)	Wilmington (2.3%)
Piedmont Region	Mountain Region
Raleigh-Durham-Fayetteville (11.6%)	Charlotte (10.8%)
Charlotte (10.7%)	Raleigh-Durham-Fayetteville (10.4%)
Atlanta (5.5%)	Greenville-Spartanburg-Asheville (9.3%)
Greensboro-High Point-Winston Salem (5.4%)	Atlanta, GA (8.4%)
Greenville-Spartanburg-Asheville (5.3%)	Greensboro-High Point-Winston Salem (8.0%)
New York (4.2%)	Tri-Cities, TN-VA (4.0%)
Columbia (3.6%)	Charleston, SC (3.4%)
Washington DC (Hagerstown, MD) (3.5%)	New York (3.2%)
Greenville-New Bern-Washington (3.0%)	Orlando-Daytona Beach-Melbourne (3.0%)
Roanoke-Lynchburg (2.7%)	Chattanooga (2.4%)

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

## **2013 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.