

2014 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 1.3 million international visitors travel to North Carolina. This includes more than 520,000 Canadians.
- International visitation to North Carolina is estimated to have grown more than seven percent from 2013 to 2014, with the most growth from visitors from Ireland, India, China, the UK and France.
- Approximately \$451 million in spending is associated with these visitors. The top ten origin countries represent 71 percent of visitation and 65 percent of spending.
- In terms of market share of international visitors to North Carolina, the Canada is the top market with 40% of market share and 28% of spending. The top overseas market is the UK with 7.6% of market share and 7.4% of spending. Germany (market share, 6.6%; spending, 5.9%) and China (market share, 3.4%; spending, 7.5%) are the next top markets. Other top countries in terms of volume are India, Mexico, France, Japan, Brazil and Italy.
- In terms of spending per visitor, visitors from China/Hong Kong spend the most with an average of \$756 per visitor, up slightly from \$742 per visitor in 2013. Visitors from Switzerland followed with an average per person spending of \$611, followed by visitors from Venezuela with \$573 per visitor. Other top countries with high per person spending are Japan (\$567), Italy (\$456) and Brazil (\$433). Spending includes only spending that occurs in North Carolina. Air fares and other pre-paid expenses are not included.
- Visitors from Japan, Switzerland, India and Ireland spend a much larger proportion of their total spending on lodging than other visitors to North Carolina. Visitors from 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.
- Visitors from Europe tend to spend a larger proportion of their travel budgets on dining, while visitors from South America, Mexico and Asia spend more in supermarkets, indicating that they may be cooking in their places of lodging rather than eating in restaurants. More than sixteen percent of spending by Venezuelan visitors is in supermarkets, while less than six 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 (Brazil), department stores (China), specialty retail (Venezuela) and discount stores (Mexico and Venezuela). Brazilians and Chinese visitors spend over half of their total spending in NC in retail.
- German, Italian and Swiss visitors allocate a larger proportion of total spending on auto rental and gasoline/oil than other international visitors to North Carolina. Canadians spend more than nine percent of their spending in-state on oil, but as many are drive travelers, have a lower than average percentage of spending on car rentals.

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

Rank	Country of Origin	2014 Estimated Visitors	% change from 2013	2014 Total Spent	% change from 2013	Average Spending per Visitor
1	Canada	521,776	+1.1%	\$125,284,908	-1.3%	\$240
2	United Kingdom	99,831	+15.2%	\$33,296,475	+2.2%	\$334
3	Germany	86,783	+8.1%	\$26,763,039	+5.9%	\$308
4	China/Hong Kong	44,891	+18.1%	\$33,918,955	+20.3%	\$756
5	India	39,502	+19.9%	\$14,586,976	+14.0%	\$369
6	Mexico	38,085	+11.6%	\$14,078,014	+6.6%	\$370
7	France	30,090	+14.2%	\$9,587,122	+0.6%	\$319
8	Japan	29,677	+5.4%	\$16,826,314	+13.2%	\$567
9	Brazil	21,996	-9.3%	\$9,513,586	-11.0%	\$433
10	Italy	15,390	+8.4%	\$7,012,467	+10.4%	\$456
11	Ireland	14,302	+22.3%	\$5,499,617	+14.1%	\$385
12	Australia	11,166	+9.8%	\$4,642,566	+9.5%	\$416
13	Spain	10,360	+11.7%	\$2,981,598	+5.0%	\$288
14	South Korea	10,049	+5.1%	\$4,280,210	-2.7%	\$426
15	Sweden	9,591	-2.8%	\$3,705,969	-2.0%	\$386
TOTAL		1,305,582	7.6%	\$451,216,760	+3.2%	\$346

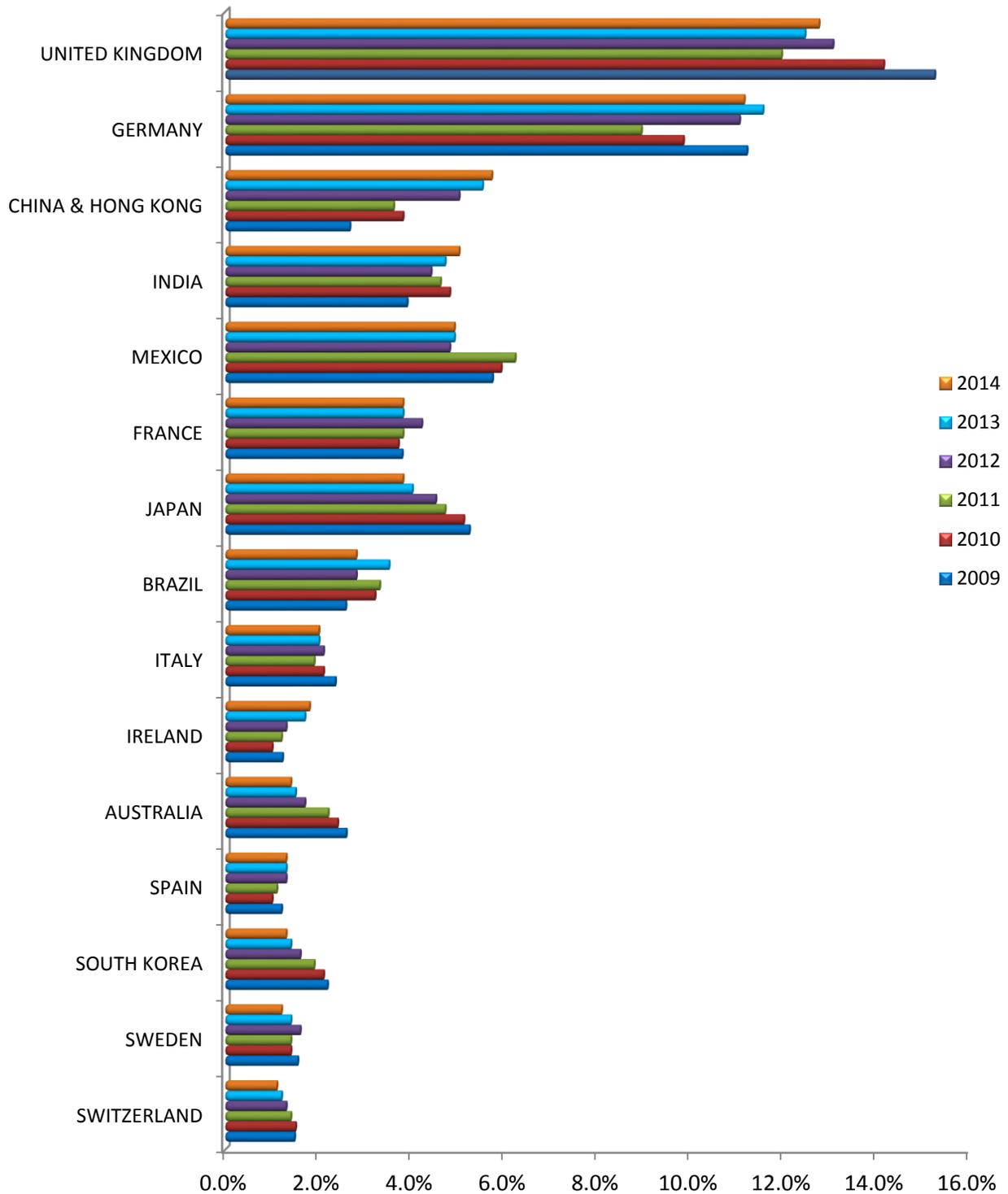
* Spending only includes what is spent in North Carolina.

** Canada is included in 2012 - 2014 estimates, therefore totals should not be directly compare with reports prior to 2012.

*** Visit North Carolina estimates are based on extrapolations from government data and aggregate Visa usage data provided by VisaVue Travel for the period of calendar year 2014.

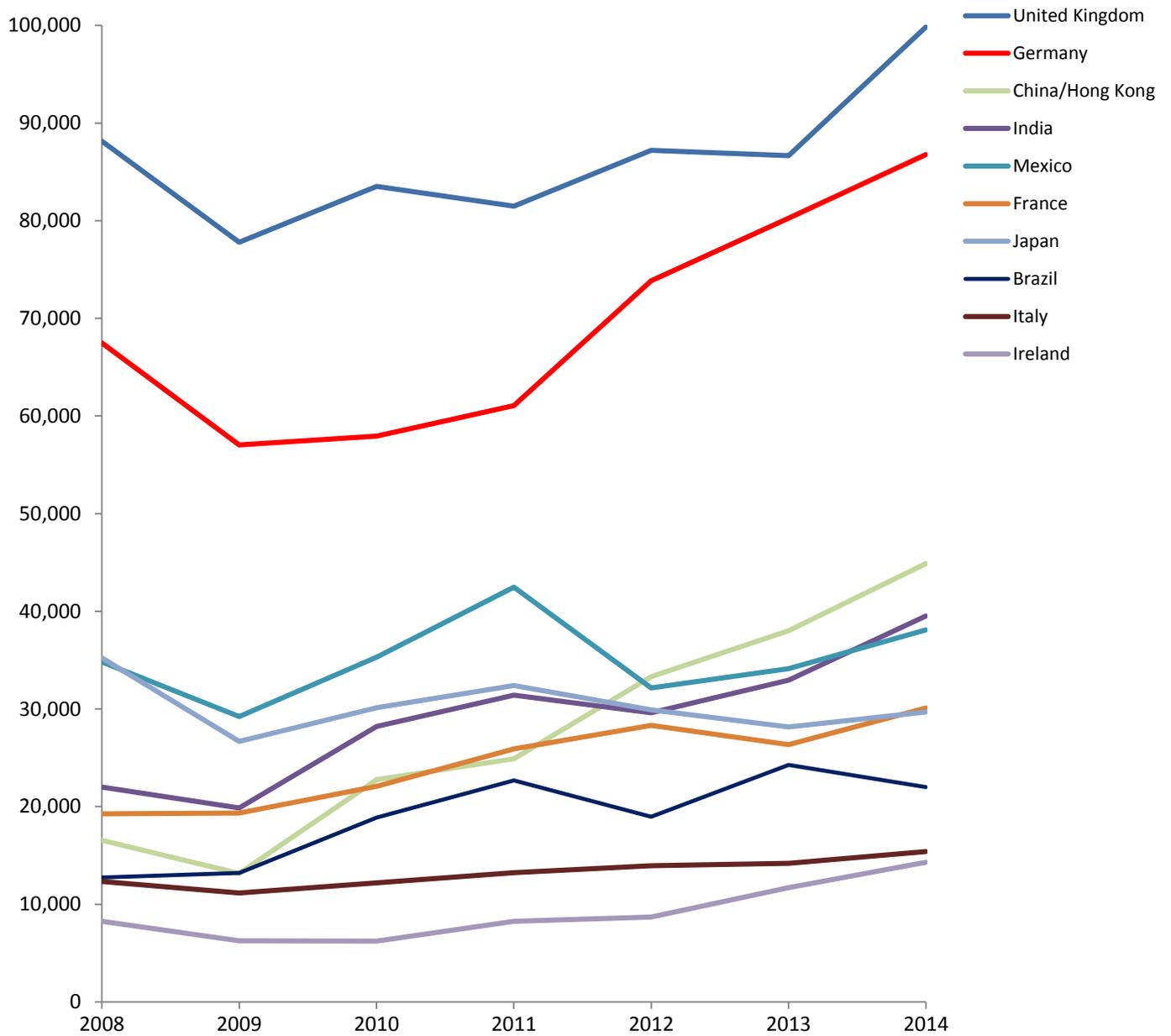
- Canada ranks #1 in terms of volume of international visitors to North Carolina, while the United Kingdom ranks #1 in terms of overseas visitation to the state with nearly 100,000 visitors. Visitation from the UK increased fifteen percent in 2014.
- Germany ranks 3rd in terms of overall international visitation and 2nd in overseas visitation. The number of German visitors to North Carolina increased eight percent in 2014 and their spending increased six percent from 2013.
- In terms of total spending in North Carolina, China/Hong Kong moved ahead of the UK and now ranks second with an estimated \$33.9 million in total spending, behind Canadians with more than \$125 million. Chinese visitors are less than half the volume of UK visitors, yet they spend two percent more.
- Chinese visitors also have the highest per person spending average at \$756, followed by visitors from Switzerland (\$611) and Venezuela (\$573).

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



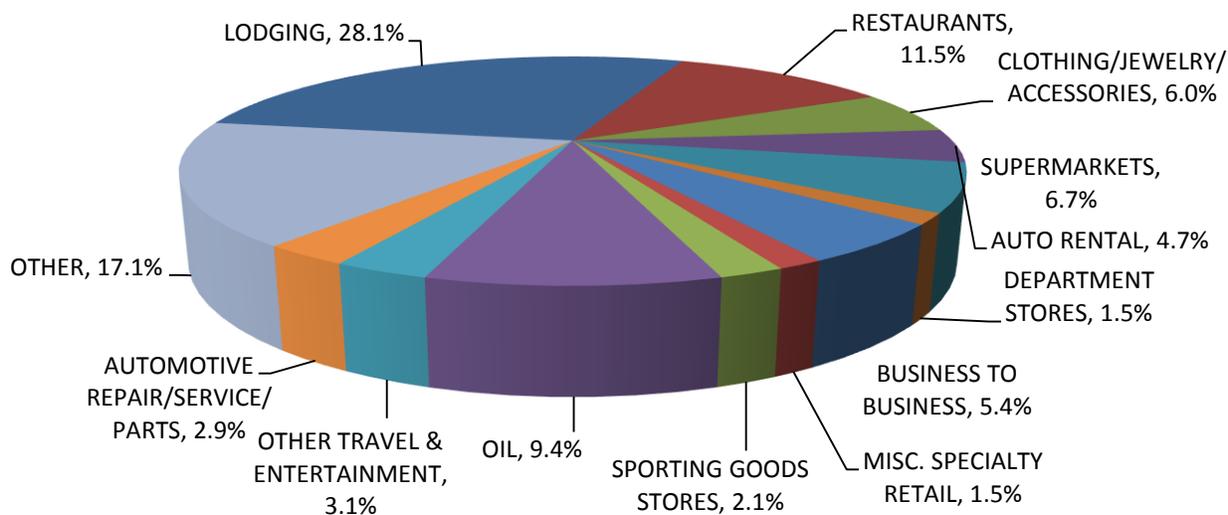
- The United Kingdom ranks #1 in terms of market share of international visitors (not including Canada) to North Carolina.
- Germany, China/Hong Kong and India are the next top markets in terms of market share.
- The top 15 countries of origin, not including Canada) represent 60 percent of market share of international visitation to North Carolina.

Chart 2: Volume Growth of Top International Markets to North Carolina 2008-2014



**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. They spend nearly as much of their budgets on retail in aggregate (27%) as they do in lodging (28%).
- Visitors from Canada have the highest proportion of business to business spending (5.4% of dollars spent) and oil (9.4% of dollars spent) of all international visitors.

Table 2: Canadian Spending in North Carolina

Category	Percent of Total	Spending	% Growth from 2013
Lodging	28.1%	\$35.1M	+5.0%
Restaurants	11.5%	\$14.4M	+3.3%
Oil	9.4%	\$11.7M	-2.3%
Supermarkets	6.7%	\$8.4M	+2.1%
Clothing/Jewelry/Accessories	6.0%	\$7.6M	-4.1%
Business to Business	5.4%	\$6.8M	-7.3%
Auto Rental	4.7%	\$5.9M	+4.9%
Other Travel & Entertainment	3.1%	\$3.8M	+5.6%
Automotive Repair/Service/Parts, etc.	2.9%	\$3.6M	-19.8%
Sporting Goods Stores	2.1%	\$2.6M	+10.4%
Sub Total	79.9%	\$100.0M	
Total	100.0%	\$125.2M	-1.3%

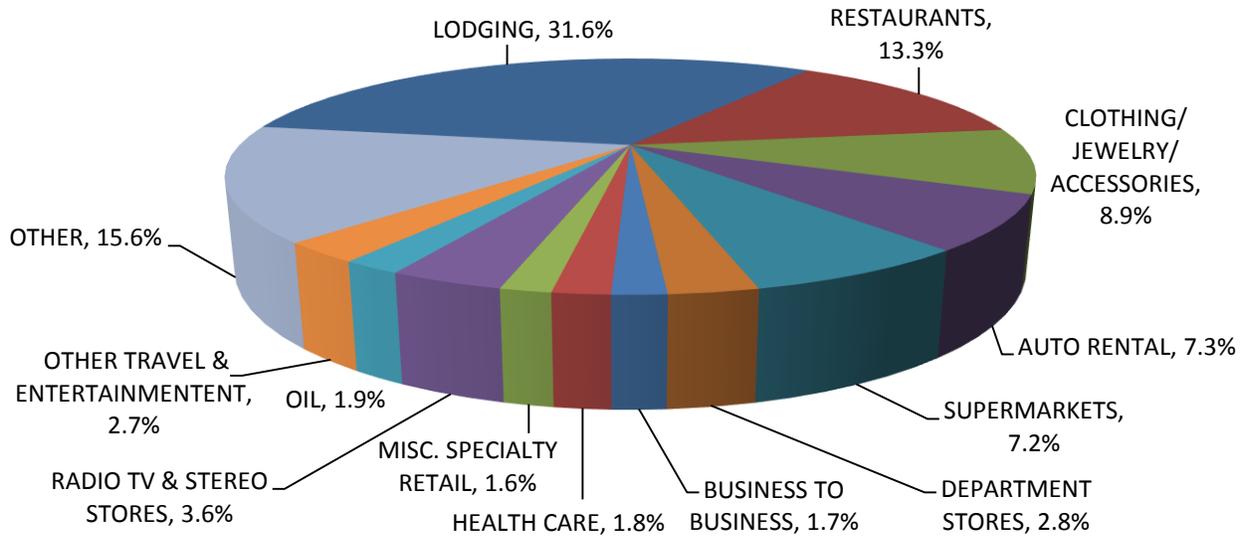
Table 3: Canadian Visitor Volume 2012-2014

Canadian Visitor Volume	2012	2013	2014
	553,948	516,073 (-6.8%)	521,776 (+1.1%)

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

- Visitation to North Carolina by Canadians was up one percent from 2013, but spending was down about one percent.
- Canada is the top international market for North Carolina with 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.
- Spending in “other travel and entertainment” increased nearly thirty percent from 2013. This category includes merchants such as duty free stores, recreation services, and public golf courses. Spending on auto rental and clothing/jewelry/accessories also increased more than ten percent.

Table 4: UK Spending in North Carolina

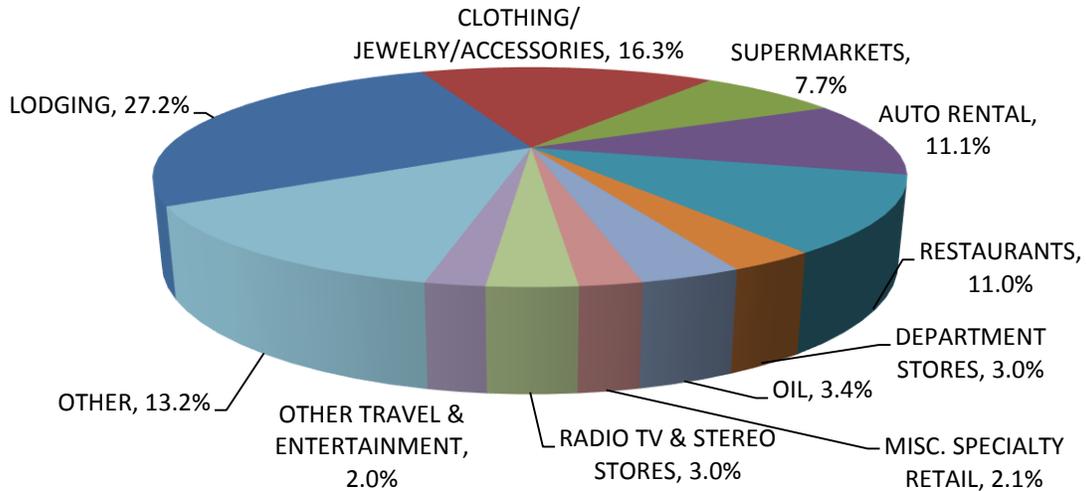
Category	Percent of Total	Spending	% Growth from 2013
Lodging	31.6%	\$10.5M	+5.1%
Restaurants	13.3%	\$4.4M	+3.6%
Clothing/Jewelry/Accessories	8.9%	\$3.0M	+12.0%
Auto Rental	7.3%	\$2.4M	+11.3%
Supermarkets	7.2%	\$2.4M	-4.0%
Radio/TV/Stereo Stores	3.6%	\$1.2M	-2.7%
Department Stores	2.8%	\$945,335	-4.4%
Other Travel & Entertainment	2.7%	\$899,427	+29.3%
Oil	1.9%	\$621,398	+4.1%
Health Care	1.8%	\$614,262	+1.0%
Sub Total	81.1%	\$27.0M	
Total	100.0%	\$33.3M	+2.2%

Table 5: UK Visitor Volume 2008-2014

UK Visitor Volume	2008	2009	2010	2011	2012	2013	2014
	88,138	77,788 (-11.7%)	81,497 (+7.3%)	81,497 (-2.4%)	87,203 (+7.0%)	86,662 (-0.6%)	99,831 (+15.2%)

- Visitation to North Carolina by UK visitors grew fifteen percent in 2014, and nears 100,000.
- 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. Nearly fifteen percent of German spending in NC is in car rental and oil/gas expenditures.
- Spending on clothing/jewelry/accessories (+10.7%) by German visitors increased in 2014, as did spending in lodging (+6.2%) and restaurants (+4.2%).

Table 6: German Spending in North Carolina

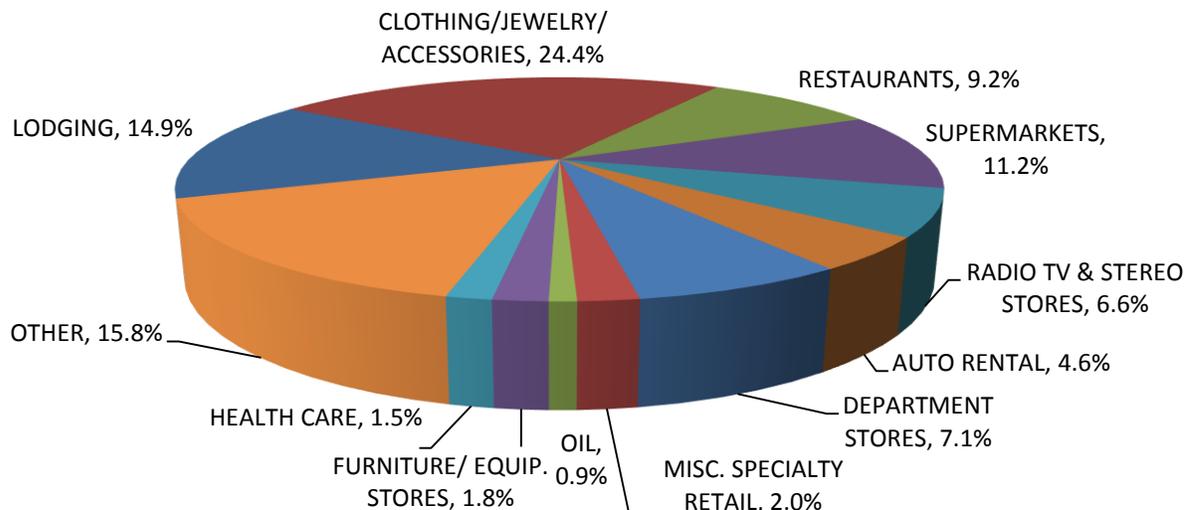
Category	Percent of Total	Spending	% Growth from 2013
Lodging	27.2%	\$7.3M	+6.2%
Clothing/Jewelry/Accessories	16.3%	\$4.4M	+10.7%
Auto Rental	11.1%	\$3.0M	+6.0%
Restaurants	11.0%	\$3.0M	+4.2%
Supermarkets	7.7%	\$2.1M	+0.4%
Oil	3.4%	\$904,675	-4.8%
Radio/TV/Stereo Stores	3.0%	\$803,738	+0.4%
Department Stores	3.0%	\$798,021	-3.4%
Specialty Retail	2.1%	\$573,163	+11.5%
Other Travel & Entertainment	2.0%	\$531,694	-9.2%
Sub Total	86.9%	\$23.3M	
Total	100.0%	\$26.8M	+5.9%

Table 7: German Visitor Volume 2008-2014

German Visitor Volume	2008	2009	2010	2011	2012	2013	2014
	67,471	57,031 (-15.5%)	57,951 (+1.6%)	61,053 (+5.4%)	73,847 (+21.0%)	80,261 (+8.7%)	86,783 (+8.1%)

- German visitation increased eight percent in 2014 to a new record level, and has seen steady increases the last four years.
- 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 nearly 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 (53%) of their total spending in retail in general.
- Chinese visitors spend a less than average proportion of total spending in restaurants and auto rentals/oil when compared to other countries.

Table 8: Chinese Spending in North Carolina

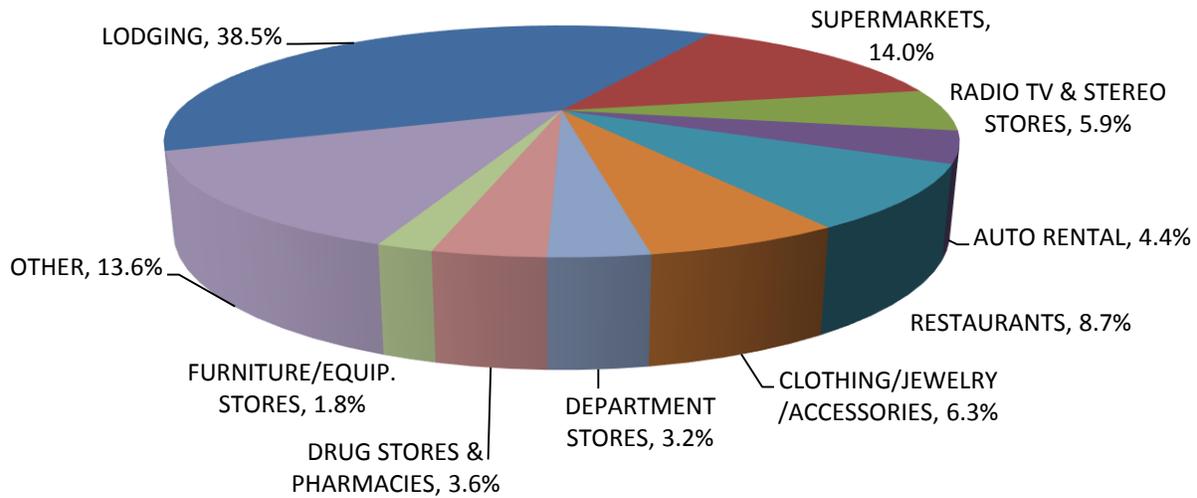
Category	Percent of Total	Spending	% Growth from 2013
Clothing/Jewelry/Accessories	24.4%	\$8.3M	+17.0%
Lodging	14.9%	\$5.1M	+17.2%
Supermarkets	11.2%	\$3.8M	+18.0%
Restaurants	9.2%	\$3.1M	+22.1%
Department Stores	7.1%	\$2.4M	+23.8%
Radio TV & Stereo Stores	6.6%	\$2.2M	+26.5%
Auto Rental	4.6%	\$1.6M	+30.9%
Specialty Retail	2.0%	\$686,215	+4.9%
Furniture/Equipment Stores	1.8%	\$621,530	+15.9%
Health Care	1.5%	\$513,293	+73.5%
Sub Total	83.4%	\$28.3M	
Total	100.0%	\$33.9M	+20.3%

Table 9: Chinese Visitor Volume 2008-2014

Chinese Visitor Volume	2008	2009	2010	2011	2012	2013	2014
	16,530	13,161 (-20.4%)	22,745 (+72.8%)	24,899 (+9.5%)	33,310 (+8.7%)	38,014 (+14.1%)	44,891 (+18.1%)

- Visitation to North Carolina by Chinese visitors continued its growth from 2013 to 2014 (+18%).
- China ranks #4 in terms of international visitation to North Carolina, and #3 in overseas visitation, but is still about half of the size of the German and UK markets.
- Chinese visitors have the highest per person spending of all international visitors to the state (\$756).

Chart 7: 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 (39%) than most other countries of origin.
- Indian visitors to North Carolina spend a slightly less than average proportion of their total spending on restaurants, but the largest of any top market at quick service restaurants (2.8%). They also allocate a greater than average proportion at supermarkets (14%).

Table 10: Indian Spending in North Carolina

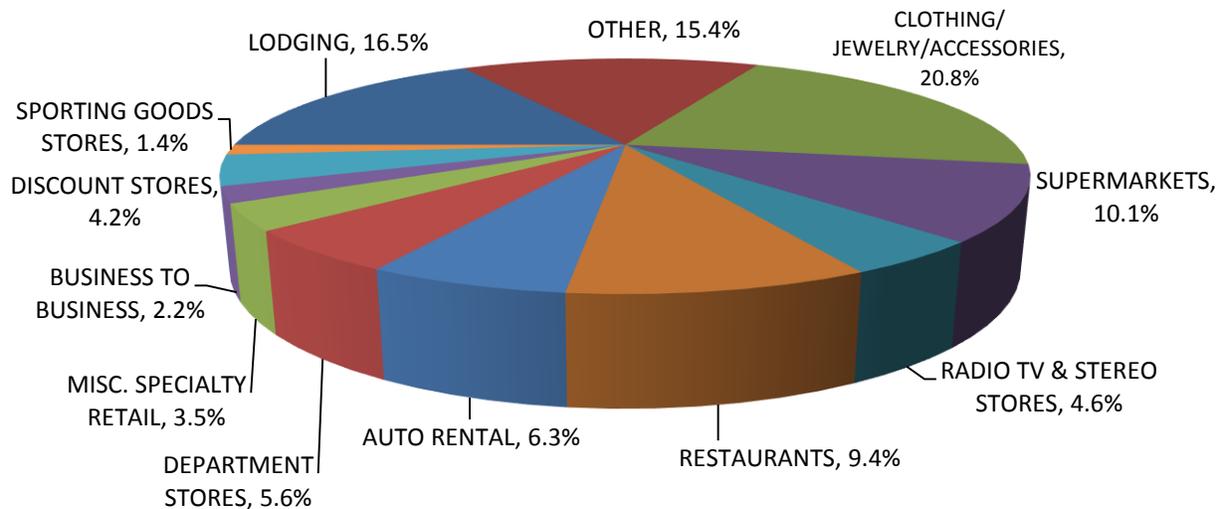
Category	Percent of Total	Spending	% Growth from 2013
Lodging	38.5%	\$5.6M	+6.4%
Supermarkets	14.0%	\$2.0M	+6.4%
Restaurants	8.7%	\$1.3M	+14.8%
Clothing/Jewelry/Accessories	6.3%	\$922,122	+12.9%
Radio/TV/Stereo Stores	5.9%	\$860,227	+2.2%
Auto Rental	4.4%	\$642,968	+30.0%
Drug Stores & Pharmacies	3.6%	\$518,351	+609.2%
Department Stores	3.2%	\$468,528	+11.1%
Furniture/Equipment Stores	1.8%	\$255,849	+92.8%
Specialty Retail	1.4%	\$204,896	+11.1%
Sub Total	87.7%	\$12.8M	
Total	100.0%	\$14.6M	+14.0%

Table 11: Indian Visitor Volume 2008-2014

Indian Visitor Volume	2008	2009	2010	2011	2012	2013	2014
	21,993	19,868 (-10.5%)	28,216 (+42.0%)	31,424 (+11.4%)	29,599 (-5.8%)	32,941 (+11.3%)	39,502 (+19.9%)

- Indian visitation to North Carolina increased nearly twenty percent in 2014 and reached a new record volume.
- India ranks #5 in terms of international visitation and #4 in overseas visitation to North Carolina.

Chart 8: 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 sixteen percent of their total spending in the state. However, in 2014, spending on lodging grew nearly twenty-five percent from 2013.
- Visitors to North Carolina from Mexico spend a greater than average proportion of their trip spending on retail, clothing/jewelry/accessories in particular. Half (49.6%) of their spending is in retail.

Table 12: Mexican Spending in North Carolina

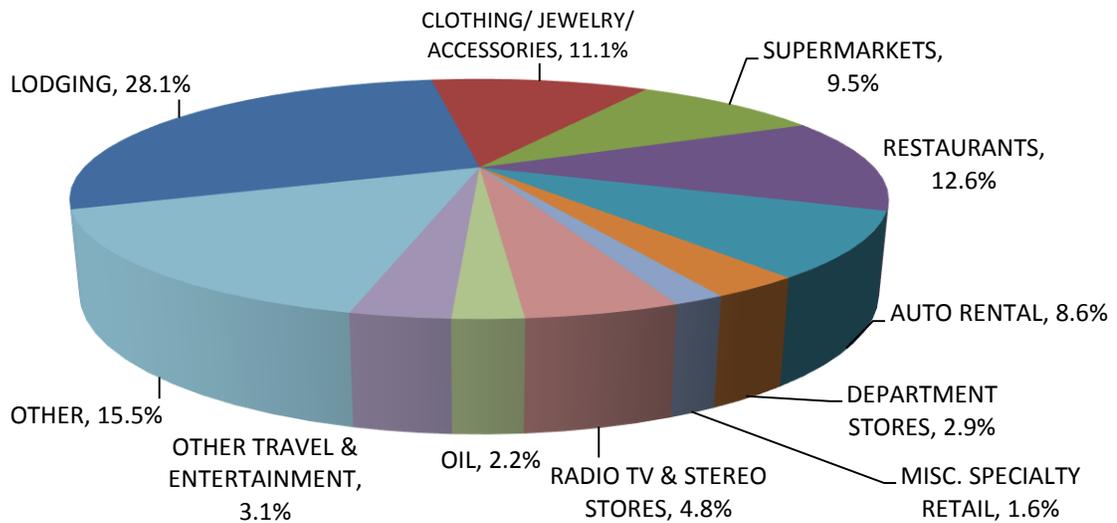
Category	Percent of Total	Spending	% Growth from 2013
Clothing/Jewelry/Accessories	20.8%	\$2.9M	+15.9%
Lodging	16.5%	\$2.3M	+24.8%
Supermarkets	10.1%	\$1.4M	-6.3%
Restaurants	9.4%	\$1.3M	+14.9%
Auto Rental	6.3%	\$888,637	+18.2%
Department Stores	5.6%	\$781,970	+1.3%
Radio TV & Stereo Stores	4.6%	\$644,000	-27.9%
Discount Stores	4.2%	\$596,873	+16.5%
Specialty Retail	3.5%	\$486,919	+6.4%
Business to Business	2.2%	\$313,003	-29.3%
Sub Total	83.2%	\$11.7M	
Total	100.0%	\$14.1M	+6.6%

Table 13: Mexican Visitor Volume 2008-2014

Mexican Visitor Volume	2008	2009	2010	2011	2012	2013	2014
	34,805	29,207 (-16.1%)	35,296 (+20.8%)	42,470 (+20.3%)	32,151 (-24.3%)	34,132 (+6.2%)	38,085 (+11.6%)

- Mexican visitation to the state increased eleven percent from 2013, but still lags slightly behind 2011 levels.
- The country ranks #6 in terms of international visitation to the state.

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



- French visitors to North Carolina spend less than 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 on auto rentals and oil combined grew more than nine percent in 2014.

Table 14: French Spending in North Carolina

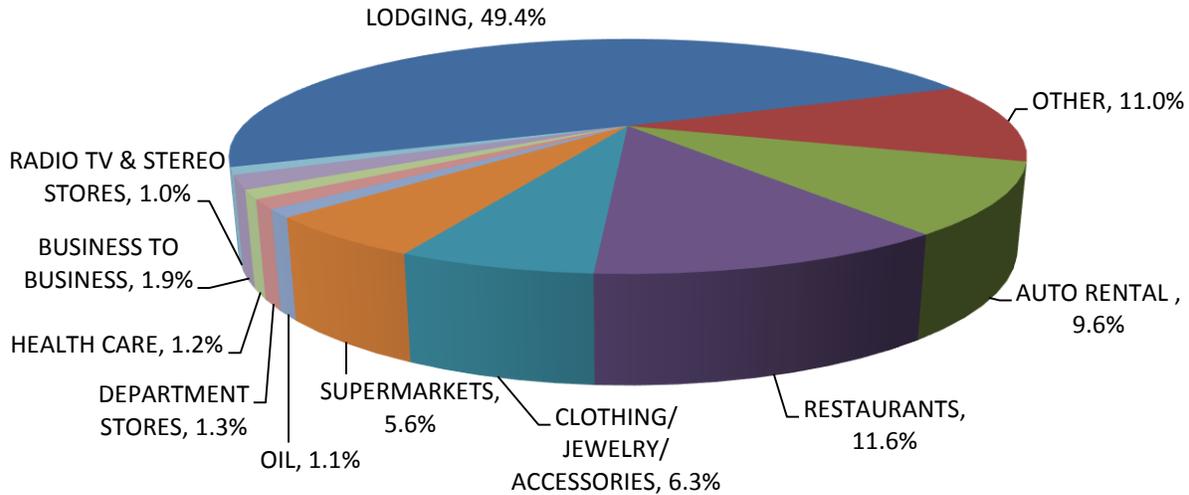
Category	Percent of Total	Spending	% Growth from 2013
Lodging	28.1%	\$2.7M	-3.2%
Restaurants	12.6%	\$1.2M	+3.1%
Clothing/Jewelry Stores	11.1%	\$1.1M	+1.3%
Supermarkets	9.5%	\$909,637	+1.3%
Auto Rental	8.6%	\$820,938	+7.4%
Radio TV & Stereo Stores	4.8%	\$457,215	+6.9%
Other Travel & Entertainment	3.1%	\$298,971	+7.1%
Department Stores	2.9%	\$274,580	-10.4%
Oil	2.2%	\$210,250	+17.9%
Miscellaneous Specialty Stores	1.6%	\$148,779	+2.0%
Sub Total	84.4%	\$8.1M	
Total	100.0%	\$9.6M	+0.6%

Table 15: French Visitor Volume 2008-2014

French Visitor Volume	2008	2009	2010	2011	2012	2013	2014
	19,262	19,327 (+0.3%)	22,072 (+14.2%)	25,913 (+17.4%)	28,326 (+9.3%)	26,350 (-7.0%)	30,090 (+14.2%)

- After a decrease in 2013, French visitation increased fourteen percent in 2014, to a record of more than 30,000 visitors. France ranks #7 in terms of international visitation to the state.
- While volume increased, total spending was flat for the French, resulting in a decrease in per person spending in 2014.

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



- Japanese visitors to North Carolina spend a larger proportion of their total spending on lodging (49.4%) than any other country of origin to North Carolina, but the smallest proportion on retail in general (16.7%).
- Japanese visitors also allocate a higher than average proportion of spending on auto rental than other countries of origin.

Table 16: Japanese Spending in North Carolina

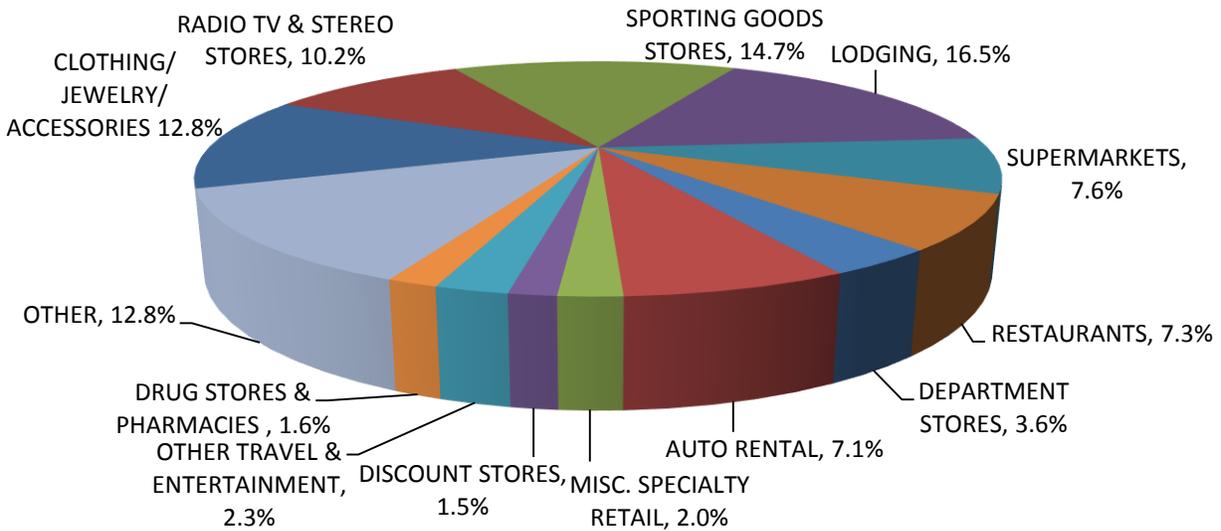
Category	Percent of Total	Spending	% Growth from 2013
Lodging	49.4%	\$8.3M	+24.2%
Restaurants	11.6%	\$2.0M	+17.0%
Auto Rental	9.6%	\$1.6M	+18.0%
Clothing/Jewelry Stores	6.3%	\$1.1M	-7.7%
Supermarkets	5.6%	\$941,571	+6.8%
Business to Business	1.9%	\$315,117	-11.6%
Department Stores	1.3%	\$218,482	+28.9%
Health Care	1.2%	\$209,830	+10.5%
Radio TV & Stereo Stores	1.0%	\$172,392	-13.1%
Sub Total	87.9%	\$14.8M	
Total	100.0%	\$16.8M	+13.2%

Table 17: Japanese Visitor Volume 2008-2014

Japanese Visitor Volume	2008	2009	2010	2011	2012	2013	2014
	35,227	26,679	30,111	32,383	29,902	28,150	29,677
		(-24.3%)	(+12.9%)	(+7.5%)	(-7.7%)	(-5.9%)	(+5.4%)

- Visitation from Japanese travelers increased five percent from 2013, but remain slightly below 2010 levels.
- Japan ranks #8 in terms of international visitation and #6 in overseas visitation to North Carolina.

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



- Brazilian visitors to North Carolina spend a much higher than average proportion of money in retail in general (53%) than visitors from other countries, with the exception of China. They allocate the largest proportion of spending to radio, TV and stereo stores (10%) and sporting goods stores (15%) than any other top country.
- Brazilian visitors to North Carolina spend the smallest proportion of their total spending on restaurants (7%) when compared to all other origin markets except Venezuela.

Table 18: Brazilian Spending in North Carolina

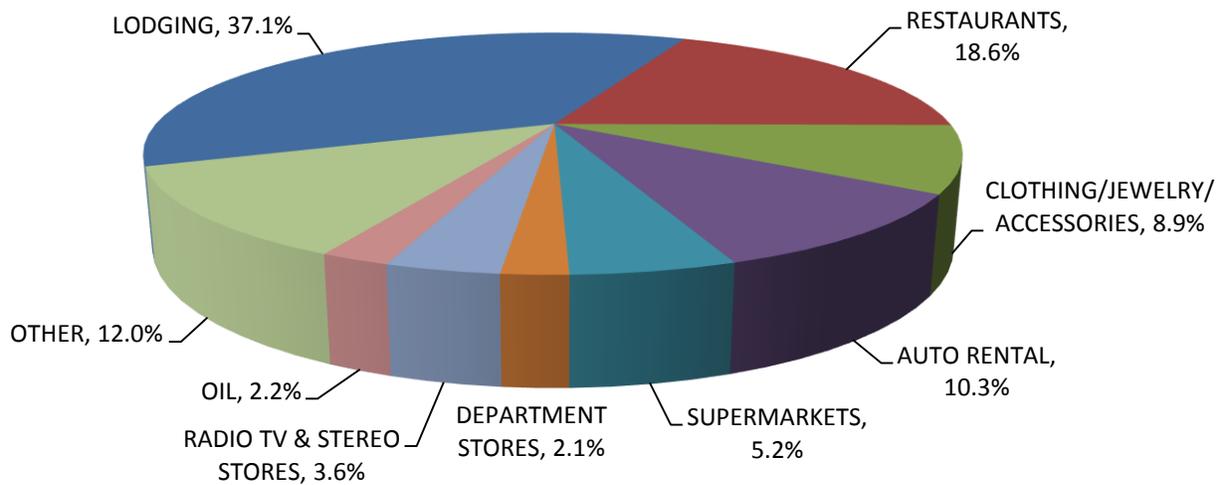
Category	Percent of Total	Spending	% Growth from 2013
Lodging	16.5%	\$1.6M	+24.0%
Sporting Goods Stores	14.7%	\$1.4M	-0.7%
Clothing/Jewelry Stores	12.8%	\$1.2M	-25.3%
Radio TV & Stereo Stores	10.2%	\$970,174	-24.9%
Supermarkets	7.6%	\$725,379	-36.3%
Restaurants	7.3%	\$695,308	-7.1%
Auto Rental	7.1%	\$671,633	+20.7%
Department Stores	3.6%	\$338,452	-18.1%
Other Travel & Entertainment	2.3%	\$215,259	-30.8%
Miscellaneous Specialty Retail	2.0%	\$190,831	-26.3%
Sub Total	84.0%	\$8.0M	
Total	100.0%	\$9.5M	-11.0%

Table 19: Brazilian Visitor Volume 2008-2014

Brazilian Visitor Volume	2008	2009	2010	2011	2012	2013	2014
	12,745	13,212	18,883	22,665	18,960	24,262	21,996
		(+3.7%)	(+42.9%)	(+20.0%)	(-16.3%)	(+28.0%)	(-9.3%)

- Brazilian visitor volume decreased nine percent in 2014.
- The country remains #9 in terms of international visitation to the state.

Chart 12: 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 (19%). They also spend a larger than average proportion of their budget on lodging (37%).
- Visitors from Italy spend a smaller than average proportion of their total spending retail in general (22%), but a greater than average proportion on auto rental/oil (13%).

Table 20: Italian Spending in North Carolina

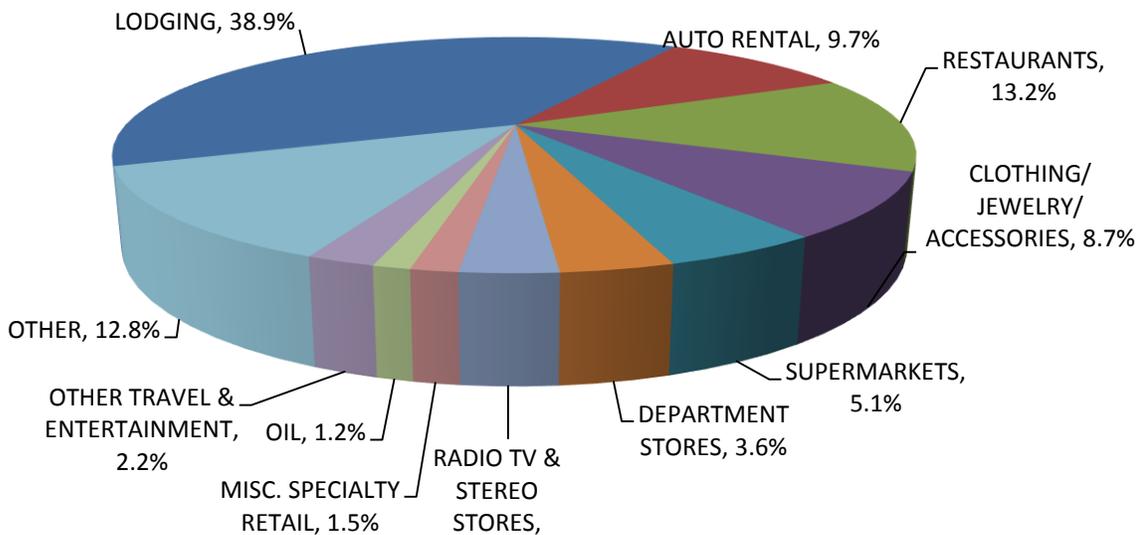
Category	Percent of Total	Spending	% Growth from 2013
Lodging	37.1%	\$2.6M	+30.8%
Restaurants	18.6%	\$1.3M	+13.0%
Auto Rental	10.3%	\$721,768	+5.0%
Clothing/Jewelry Stores	8.9%	\$623,696	+7.8%
Supermarkets	5.2%	\$362,545	-10.1%
Radio TV & Stereo Stores	3.6%	\$250,021	-13.6%
Oil	2.2%	\$151,509	+0.3%
Department Stores	2.1%	\$146,892	+21.1%
Sub Total	87.9%	\$6.2M	
Total	100.0%	\$7.0M	+10.4%

Table 21: Italian Visitor Volume 2008-2014

Italian Visitor Volume	2008	2009	2010	2011	2012	2013	2014
	12,316	11,152 (-9.5%)	12,177 (+9.2%)	13,234 (+8.7%)	13,945 (+5.4%)	14,196 (+1.8%)	15,390 (+8.4%)

- Italy, as a country of origin market, experienced a fifth consecutive year of positive growth in terms of visitor volume.
- Italy ranks #10 in terms of North Carolina’s international markets.

Chart 13: 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 (39%), similar to the proportion spent by visitors from India, Italy and Switzerland.
- These visitors also allocate a higher than average proportion of spending to auto rentals and restaurants.

Table 22: Irish Spending in North Carolina

Category	Percent of Total	Spending	% Growth from 2013
Lodging	38.9%	\$2.1M	+38.2%
Restaurants	13.2%	\$725,228	+26.1%
Clothing/Jewelry Stores	8.7%	\$480,504	+5.6%
Auto Rental	9.7%	\$534,571	+43.3%
Supermarkets	5.1%	\$278,307	-2.8%
Radio TV & Stereo Stores	3.1%	\$172,706	-17.7%
Department Stores	3.6%	\$196,065	+7.3%
Other Travel & Entertainment	2.2%	\$122,551	-28.8%
Miscellaneous Specialty Retail	1.5%	\$83,363	+0.1%
Oil	1.2%	\$68,285	+0.4%
Sub Total	87.3%	\$4.8M	
Total	100.0%	\$5.5M	+14.1%

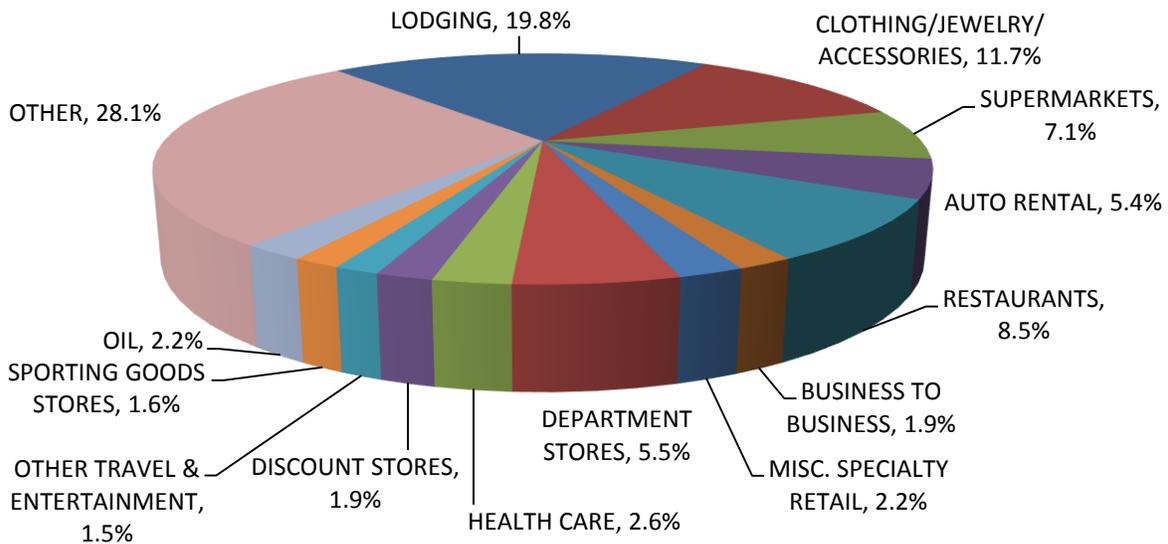
Table 23: Irish Visitor Volume 2008-2014

Irish Visitor Volume	2008	2009	2010	2011	2012	2013	2014
	8,253	6,240 (-24.4%)	6,220 (-0.3%)	8,243 (+32.5%)	8,693 (+5.5%)	11,699 (+34.6%)	14,302 (+22.3%)

- Ireland saw great growth again in 2014 in terms of visitors to North Carolina and set a new record with more than 14,000 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 14: 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 when compared to other countries of origin.
- Visitors from Australia spend a larger than average proportion of their total spending in retail in general. More than forty percent (46%) of their total spending is in retail.

Table 24: Australian Spending in North Carolina

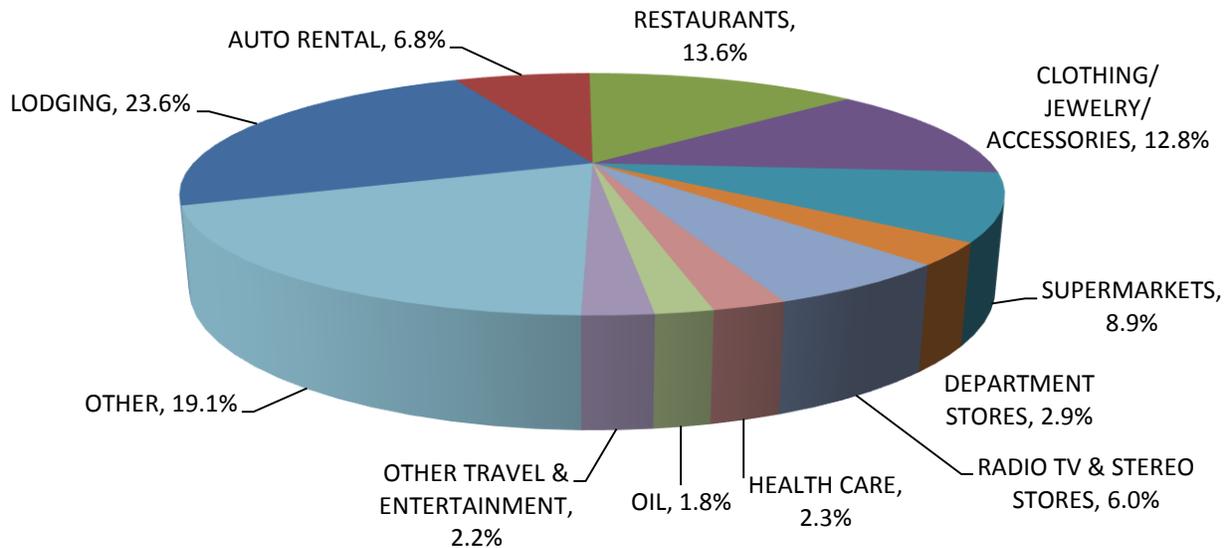
Category	Percent of Total	Spending	% Growth from 2013
Lodging	19.8%	\$918,759	+3.4%
Clothing/Jewelry Stores	11.7%	\$542,209	+20.6%
Restaurants	8.5%	\$396,307	+16.7%
Supermarkets	7.1%	\$327,574	+7.0%
Department Stores	5.5%	\$256,370	+87.4%
Auto Rental	5.4%	\$250,022	-6.0%
Health Care	2.6%	\$120,005	-17.1%
Miscellaneous Specialty Retail	2.2%	\$101,644	-6.0%
Oil	2.2%	\$101,511	+46.7%
Business to Business	1.9%	\$87,604	-32.9%
Discount Stores	1.9%	\$89,079	+102.3%
Sub Total	68.7%	\$3.2M	
Total	100.0%	\$4.6M	+9.5%

Table 25: Australian Visitor Volume 2008-2014

Australian Visitor Volume	2008	2009	2010	2011	2012	2013	2014
	12,769	12,018 (-5.9%)	13,997 (+16.5%)	15,072 (+7.7%)	11,136 (-26.1%)	10,172 (-8.7%)	11,166 (+9.8%)

- Australian visitation increased nearly ten percent in 2014 after two years of significant decreases.
- Australia is the 12th ranked origin market for NC international visitation.

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



- Spanish visitors to North Carolina spend a slightly larger than average proportion of their total spending on restaurants (14%) than other international visitors.

Table 26: Spanish Spending in North Carolina

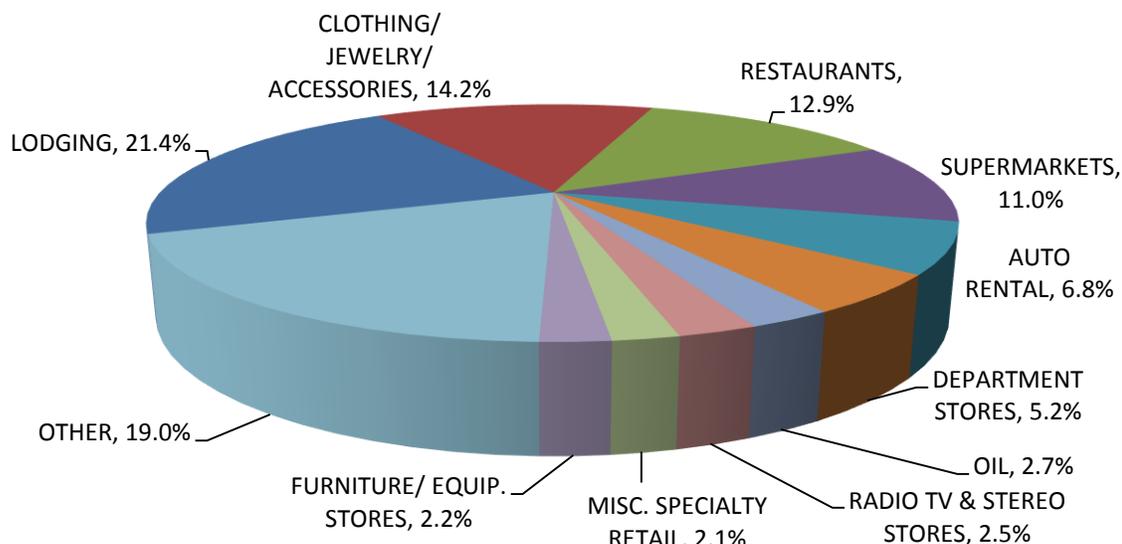
Category	Percent of Total	Spending	% Growth from 2013
Lodging	23.6%	\$1.0M	+15.6%
Restaurants	13.6%	\$601,521	+9.9%
Clothing/Jewelry Stores	12.8%	\$565,407	+11.1%
Supermarkets	8.9%	\$396,070	-9.2%
Auto Rental	6.8%	\$300,723	-6.1%
Radio TV & Stereo Stores	6.0%	\$264,671	-12.5%
Department Stores	2.9%	\$128,019	+3.4%
Health Care	2.3%	\$99,834	+105.1%
Other Travel & Entertainment	2.2%	\$96,738	+79.3%
Oil	1.8%	\$80,097	-21.2%
Miscellaneous Specialty Retail	1.7%	\$75,445	-10.6%
Sub Total	82.5%	\$3.7M	
Total	100.0%	\$4.4M	+3.8%

Table 27: Spanish Visitor Volume 2008-2014

Spanish Visitor Volume	2008	2009	2010	2011	2012	2013	2014
	6,156	6,085 (-1.2%)	5,996 (-1.5%)	7,818 (+30.4%)	8,582 (+9.8%)	9,271 (8.0%)	10,360 (+11.7%)

- Visitation to North Carolina from Spain increased for the fourth straight year, and is at a record level with more than 10,000 visitors in 2014.
- Spain ranks #13 in terms of international visitation to North Carolina, up from #15 in 2013.

Chart 16: 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 in supermarkets (11%) and still spend nearly thirteen percent of their total spending in restaurants, suggesting food and dining is very important while visiting.
- These visitors also allocate a slightly larger than average proportion of their travel budgets on clothing/jewelry/accessories (14%).

Table 28: South Korean Spending in North Carolina

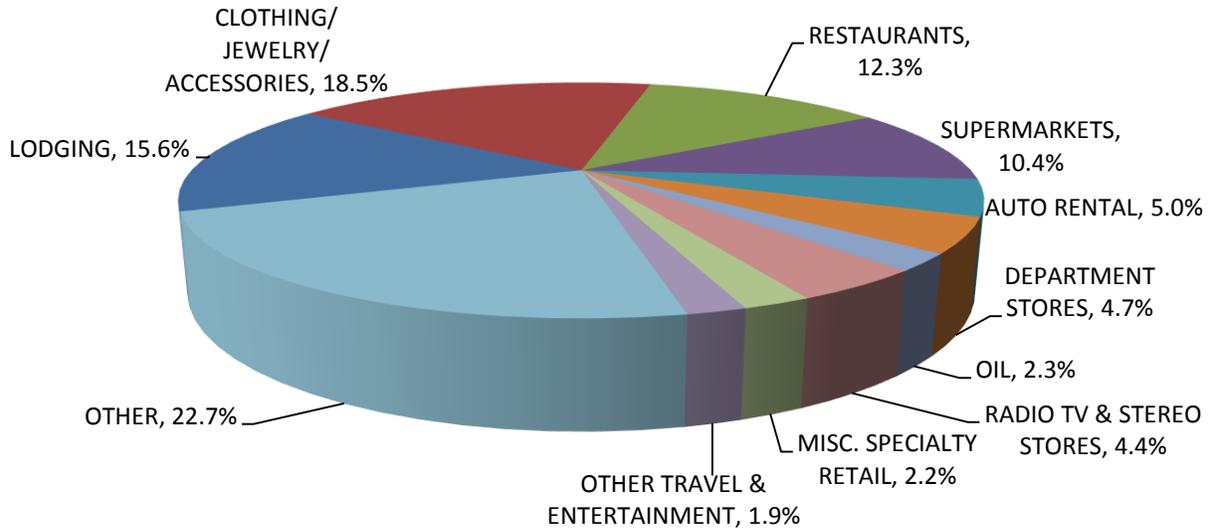
Category	Percent of Total	Spending	% Growth from 2013
Lodging	21.4%	\$914,399	+8.8%
Clothing/Jewelry Stores	14.2%	\$609,046	-11.4%
Restaurants	12.9%	\$553,257	+10.3%
Supermarkets	11.0%	\$470,427	+10.6%
Auto Rental	6.8%	\$291,141	-22.6%
Department Stores	5.2%	\$222,222	+2.9%
Oil	2.7%	\$115,192	-4.0%
Radio TV & Stereo Stores	2.5%	\$107,059	+3.1%
Furniture/Equipment Stores	2.2%	\$94,563	-2.4%
Miscellaneous Specialty Retail	2.1%	\$89,362	-24.7%
Sub Total	81.0%	\$3.5M	
Total	100.0%	\$4.3M	-2.7%

Table 29: South Korean Visitor Volume 2008-2014

South Korean Visitor Volume	2008	2009	2010	2011	2012	2013	2014
	13,276	13,606 (+2.5%)	12,666 (-6.9%)	12,690 (+0.2%)	10,781 (-15.0%)	9,562 (-11.3%)	10,049 (+5.1%)

- After two years of declines, visitation from South Korea increased five percent in 2014.
- The country is ranked #14 in terms of international visitor volume to North Carolina.

Chart 17: 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 (15.6%).
- These visitors, however, spend a larger proportion of their total spending on retail in general (48%), and on clothing/jewelry/accessories in particular (19%), than most other countries of origin.

Table 30: Swedish Spending in North Carolina

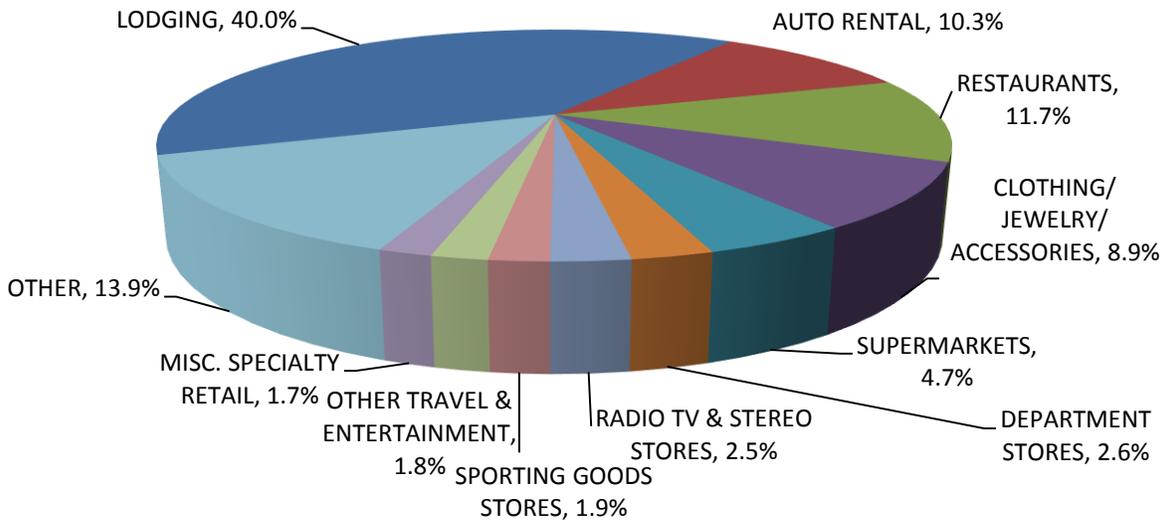
Category	Percent of Total	Spending	% Growth from 2013
Clothing/Jewelry Stores	18.5%	\$687,369	-18.9%
Lodging	15.6%	\$576,574	+11.8%
Supermarkets	10.4%	\$384,908	-2.0%
Restaurants	12.3%	\$456,506	-3.3%
Auto Rental	5.0%	\$186,682	+7.4%
Department Stores	4.7%	\$173,257	-14.6%
Radio TV & Stereo Stores	4.4%	\$163,034	-31.9%
Oil	2.3%	\$86,328	+2.3%
Miscellaneous Specialty Retail	2.2%	\$83,233	-11.1%
Other Travel & Entertainment	1.9%	\$72,249	+10.3%
Sub Total	77.4%	\$2.9M	
Total	100.0%	\$3.7M	-2.0%

Table 31: Swedish Visitor Volume 2008-2014

Swedish Visitor Volume	2008	2009	2010	2011	2012	2013	2014
	10,625	7,555	8,302	9,289	10,857	9,870	9,591
		(-28.9%)	(+9.9%)	(+11.9%)	(+16.9%)	(-9.1%)	(-2.8%)

- After three years of growth in volume, visitation from Sweden has decreased the last two years.
- Sweden dropped to #15 terms of international visitation and #13 in overseas visitation to North Carolina.

Chart 18: 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 (40%) and the largest proportion of any European country of origin.
- Visitors from Switzerland also allocate a larger proportion of spending to auto rental (10.3%) than other countries of origin.
- Visitors from Switzerland spend the smallest proportion of their total spending in supermarkets (4.7%) than other countries. As well, they spend as smaller than average proportion on retail in general.

Table 32: Swiss Spending in North Carolina

Category	Percent of Total	Spending	% Growth from 2013
Lodging	40.0%	\$2.1M	+12.8%
Restaurants	11.7%	\$609,444	+14.0%
Auto Rental	10.3%	\$538,387	+22.4%
Clothing/Jewelry Stores	8.9%	\$464,611	+7.9%
Supermarkets	4.7%	\$245,984	+5.4%
Department Stores	2.6%	\$135,774	-7.3%
Radio TV & Stereo Stores	2.5%	\$131,198	+32.4%
Sporting Goods Stores	1.9%	\$99,803	+107.9%
Other Travel & Entertainment	1.8%	\$94,623	+140.8%
Miscellaneous Specialty Retail	1.7%	\$88,579	+6.8%
Sub Total	86.1%	\$4.5M	
Total	100.0%	\$5.2M	+10.7%

Table 33: Swiss Visitor Volume 2008-2014

Swiss Visitor Volume	2008	2009	2010	2011	2012	2013	2014
	8,686	7,906	8,974	9,875	8,755	8,145	8,549
		(-9.0%)	(+13.5%)	(+10.0%)	(-11.3%)	(-7.0%)	(+5.0%)

- After several years of decreases, visitation to North Carolina from Switzerland increased five percent in 2014.
- Switzerland ranks #16 in terms of international visitation to North Carolina.

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

Table 32: German Speaking Europe

Category	Percent of Total	Spending	% Growth from 2013
Lodging	30.4%	\$9.4M	+7.6%
Clothing/Jewelry Stores	14.5%	\$4.8M	+10.4%
Restaurants	11.2%	\$3.6M	+5.7%
Auto Rental	10.9%	\$3.5M	+8.2%
Supermarkets	6.9%	\$2.3M	+0.9%
Oil	2.9%	\$980,963	-7.1%
Radio TV & Stereo Stores	2.9%	\$934,936	+4.0%
Department Stores	2.9%	\$933,795	-4.0%
Miscellaneous Specialty Retail	2.0%	\$661,742	+10.8%
Other Travel & Entertainment	1.9%	\$626,318	+0.2%
Sub Total	86.6%	\$27.7M	
Total	100.0%	\$32.0M	+6.7%

Table 33: German Speaking Europe Visitor Volume 2008-2014

German Speaking Europe Visitor Volume	2008	2009	2010	2011	2012	2013	2014
	76,157	64,937 (-10.8%)	66,925 (+3.1%)	70,928 (+6.0%)	82,602 (+16.5%)	88,406 (+7.0%)	95,332 (+7.8%)

Notes

- The data presented in the following report represents conservative projected estimates by Visit North Carolina 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 2014.
- 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.