

# **2014 North Carolina Regional Travel Summary**

**A publication of Visit North Carolina**  
A Unit of the Economic Development Partnership of North Carolina



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## 2014 North Carolina Regional Travel Summary

Visit North Carolina, formerly the North Carolina Division of Tourism, Film and Sports Development, has contracted with the research company TNS for data on North Carolina visitors since 2006. 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 research staff of Visit North Carolina created the following report based on this data from TravelsAmerica.

The purpose of this regional report is to provide each region with research data specific to their geographic area. The report is divided into four sections: Coast, Piedmont, Mountain and a comparison section. 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 2013 are also offered as available. At the end of the report, an appendix offers definitions of key travel terms.

## 2014 North Carolina Regional Travel Summary

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## 2014 Domestic Coastal Region Travel

### Summary

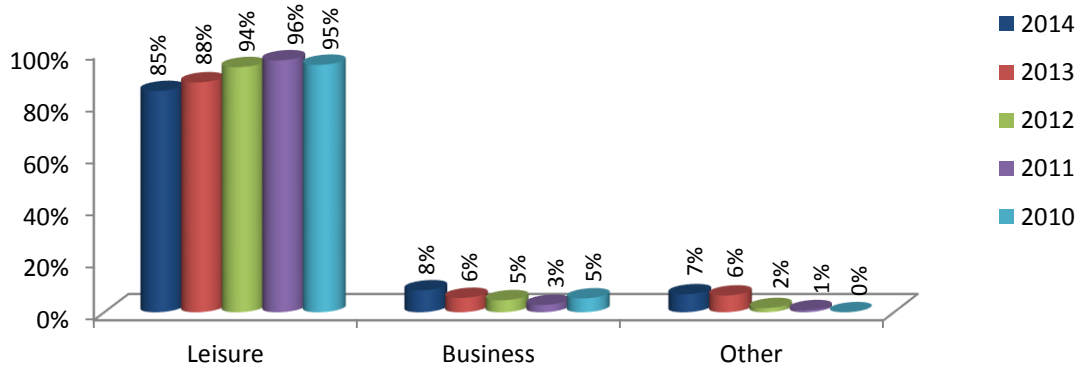
- ◆ In 2014, 21 percent of North Carolina visitors traveled to North Carolina’s Coastal Region, approximately 10.3 million person-trips. For marketing purposes, the Coastal Region is made up of twenty-eight most eastern counties of North Carolina.
- ◆ Eighty-three percent of all domestic visitors came to the Coastal Region for pleasure purposes, while ten percent of visitors came to conduct business (includes meeting/convention). The remaining visitors indicated “other” reason for visiting the region.
- ◆ The summer (June - August) was the most popular season for travel to North Carolina’s Coastal Region, with forty-one percent of all 2014 coastal visitors. Spring (March-May) and fall (September - November) followed with twenty-five percent and twenty percent of coastal visitors respectively. The winter season (December-February) was the least visited with fourteen percent. July was the single largest month for coastal travel with sixteen (16.3%) percent.
- ◆ Overnight visitors to the Coastal Region spent an average of 2.9 nights in the region in 2014, down from 3.3 in 2013.
- ◆ Twenty-nine percent of Coastal Region visitors stayed in a private home while thirty-six percent lodged at a hotel/motel. Nineteen percent stayed in a rental home and six percent stayed in a rental condo. Just over eight percent stayed in a personal second home or condo.
- ◆ The average travel party size for all Coastal Region visitors was 1.9 people. Twenty-eight percent of overnight travel parties to the region included children in the party, a drop from thirty-three percent in 2013.
- ◆ Eighty-seven percent of overnight travelers to the Coastal Region drove (includes personal automobile, rental, motorcycle and RV), while seven percent traveled by air.
- ◆ In 2014, the average household trip expenditure in the Coastal Region was \$866. The average household trip expenditure for overnight visitors to the Coastal Region was \$1,027. Daytrip parties to the Coast region spent approximately \$117 per visit.
- ◆ The top states of origin of *overnight* visitors to the Coastal Region were North Carolina (49.2%), Virginia (11.1%), Pennsylvania (6.0%), Maryland (5.3%), Florida (3.4%), New York (3.2%), New Jersey (2.8%), Ohio (2.7%), South Carolina (2.4%), Georgia (2.1%) and Tennessee (2.0%).
- ◆ Forty-one percent of all households that traveled to North Carolina’s Coastal Region in 2014 had a household income over \$75,000.
- ◆ In 2014, Raleigh/Durham/Fayetteville (20.3%) was the top advertising market of origin for *overnight* travelers to the Coastal Region, followed by Charlotte (9.8%), Greensboro/High Point/Winston Salem (9.0%), Greenville-New Bern-Washington (5.4%), Norfolk-Portsmouth-Newport News (4.9%), Baltimore (4.4%), New York (4.0%), Washington DC (3.3%), and Richmond-Petersburg, VA (3.1%).

## Coastal Region Overnight Visitor Profile

### Main Purpose of Visit

In 2014, nearly eighty-five percent 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 eight percent of domestic overnight visitors came for general business, convention, seminar or other group meeting, while seven percent traveled to the Coastal Region to conduct “other” business.

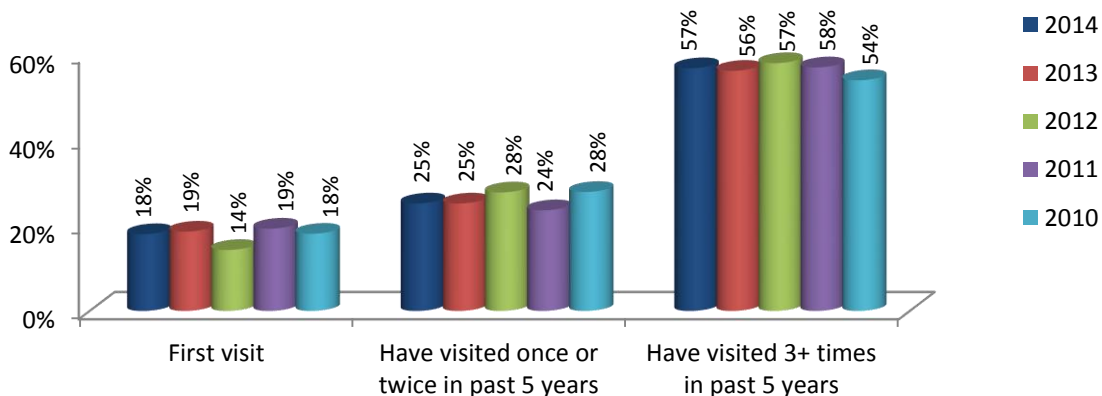
**2014 Primary Purpose of Overnight Trip to North Carolina's Coastal Region**



### First Time Out-of-State Visitors

The Coastal Region welcomed eighteen percent of first time visitors from out-of-state in 2014. The majority of overnight out-of-state visitors are still repeat, and frequent, visitors.

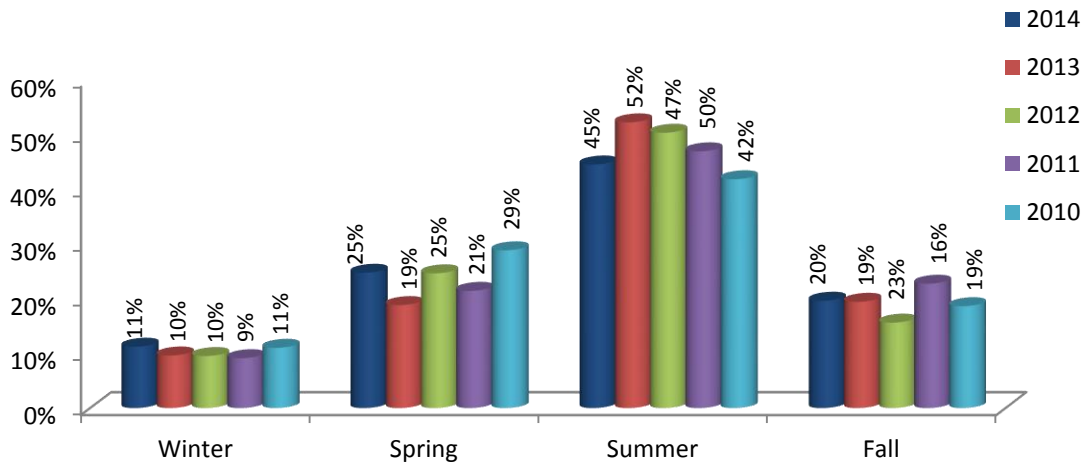
**2014 First Time vs. Repeat Out-of-State Visitors to North Carolina's Coastal Region**



## Travel Volume by Season

When examining visitation based on the typical seasonal schedule, the summer (June through August), with nearly half of the region’s annual visitors, remains the most popular season of the year for overnight travel to North Carolina’s Coastal Region. In 2014, the proportion of spring (March through May) visitors increased from 2013 in terms of proportion of total to nearly twenty-five percent. Fall (September through November) drew twenty percent of overnight visitors and winter (December through February) welcomed eleven percent of the region’s annual visitors.

**2014 Overnight Travel by Season to North Carolina's Coastal Region**



## Average Length of Stay

In 2014, an average of 2.9 nights was spent by visitors to North Carolina’s Coastal Region, down from 3.3 in 2013. Data indicates that out-of-state visitors stay an average of 3.0 nights (down from 3.9 in 2013), while in-state visitors stay an average of 2.8 nights (up from 2.6 in 2013).

## Travel Party Size

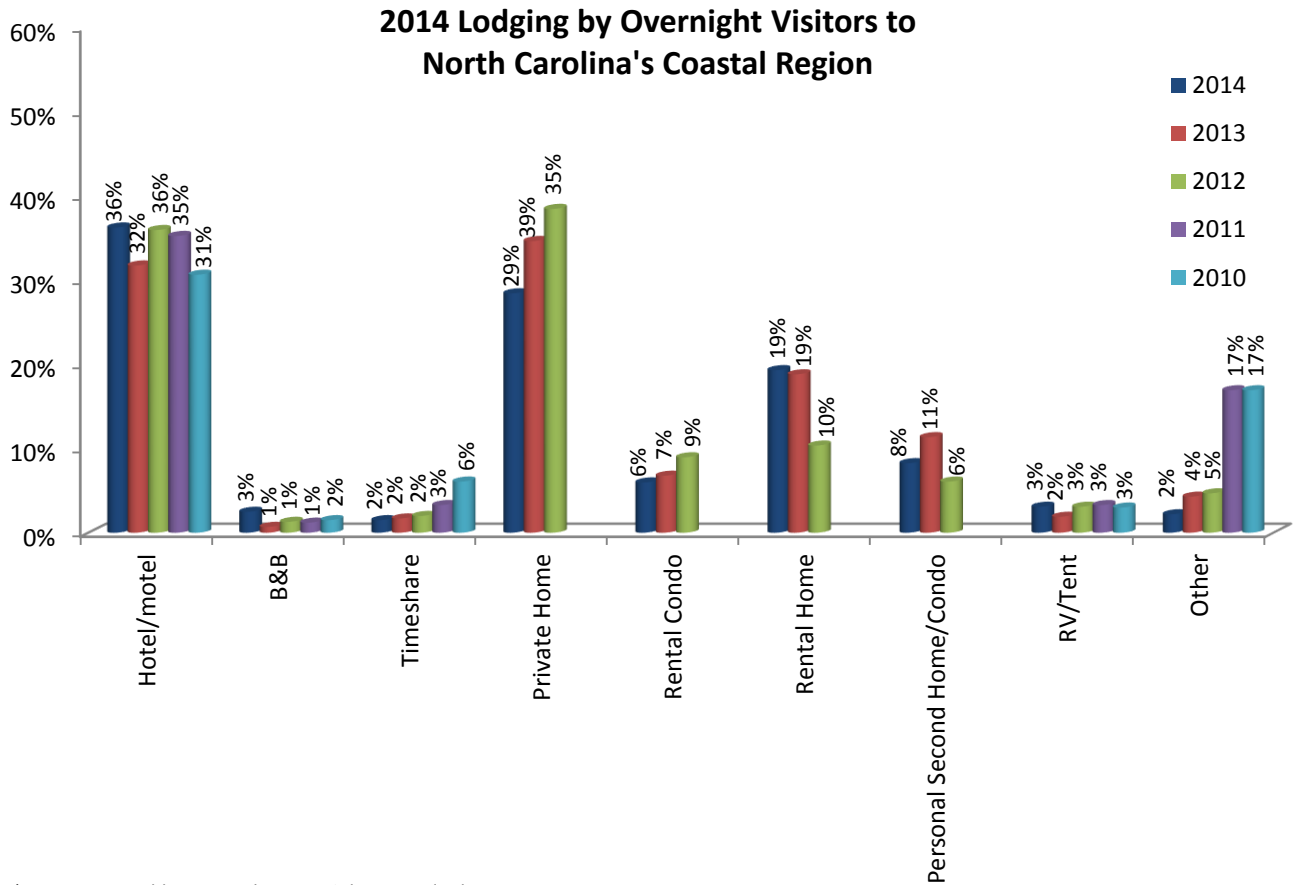
The average travel party size for all Coastal Region overnight visitors was 2.0 people, down just slightly from 2.1 in 2013.

## Children on Trip

Nearly twenty-eight percent of overnight visitor parties to the Coastal Region included children, down from thirty-three percent in 2013. Among those who traveled with children, the average number of children on trips was 2.3.

### Lodging Used in Coastal Region

In 2014, over one-third of Coastal Region visitors lodged at a hotel/motel (36.3%), up from thirty-two percent in 2013. Nearly twenty-nine percent stayed in a private home (28.5%), a decrease from thirty-five percent in 2013. 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.



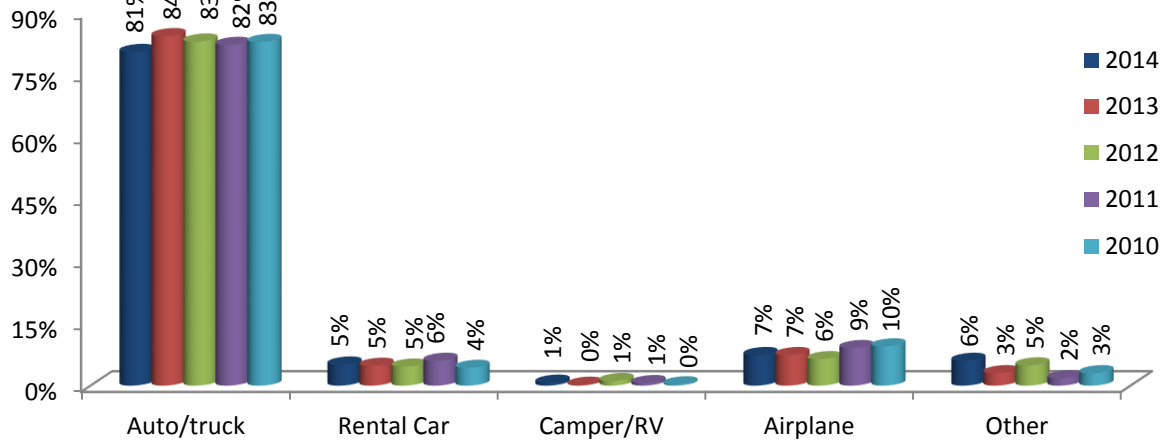
\*percentages add to more than 100% due to multiple responses

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

## Mode of Transportation

In 2014, the personal auto was by far the dominant form of transportation (81%) for overnight visitors to the Coastal Region, while seven percent traveled by air.

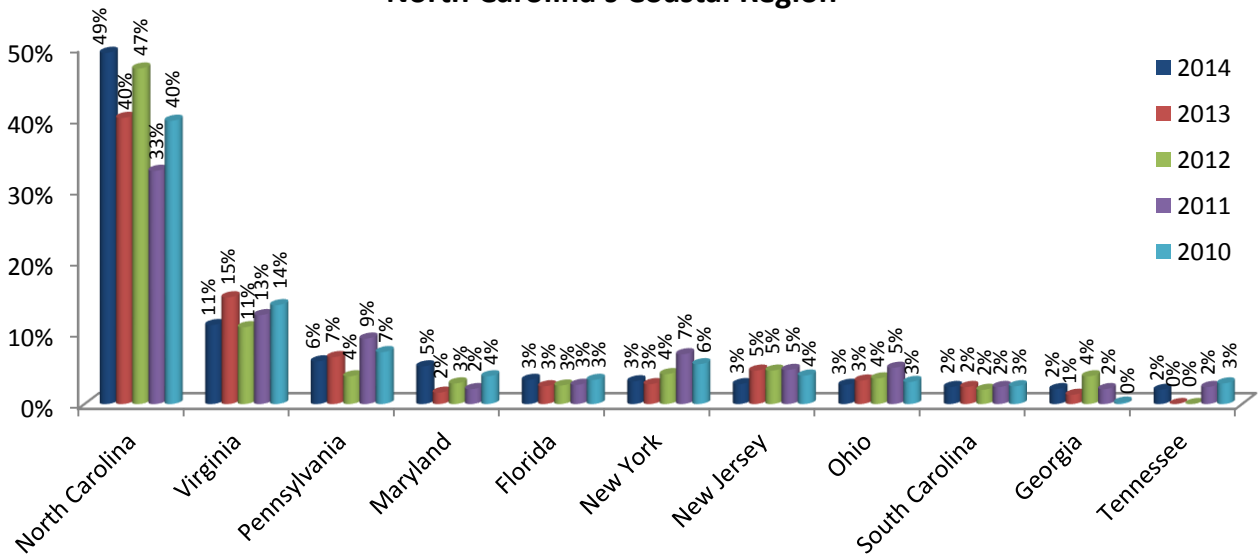
**2014 Primary Mode of Transportation to North Carolina's Coastal Region**



## Origin of Visitors

In 2014, the top states of origin for Coastal Region overnight visitors included North Carolina (49%), Virginia (11%), Pennsylvania (6%), and Maryland (5%). The proportion of in-state visitors increased from 40% in 2013, while the proportion from Virginia to the coast decreased from 15% in 2013 to 11% in 2014.

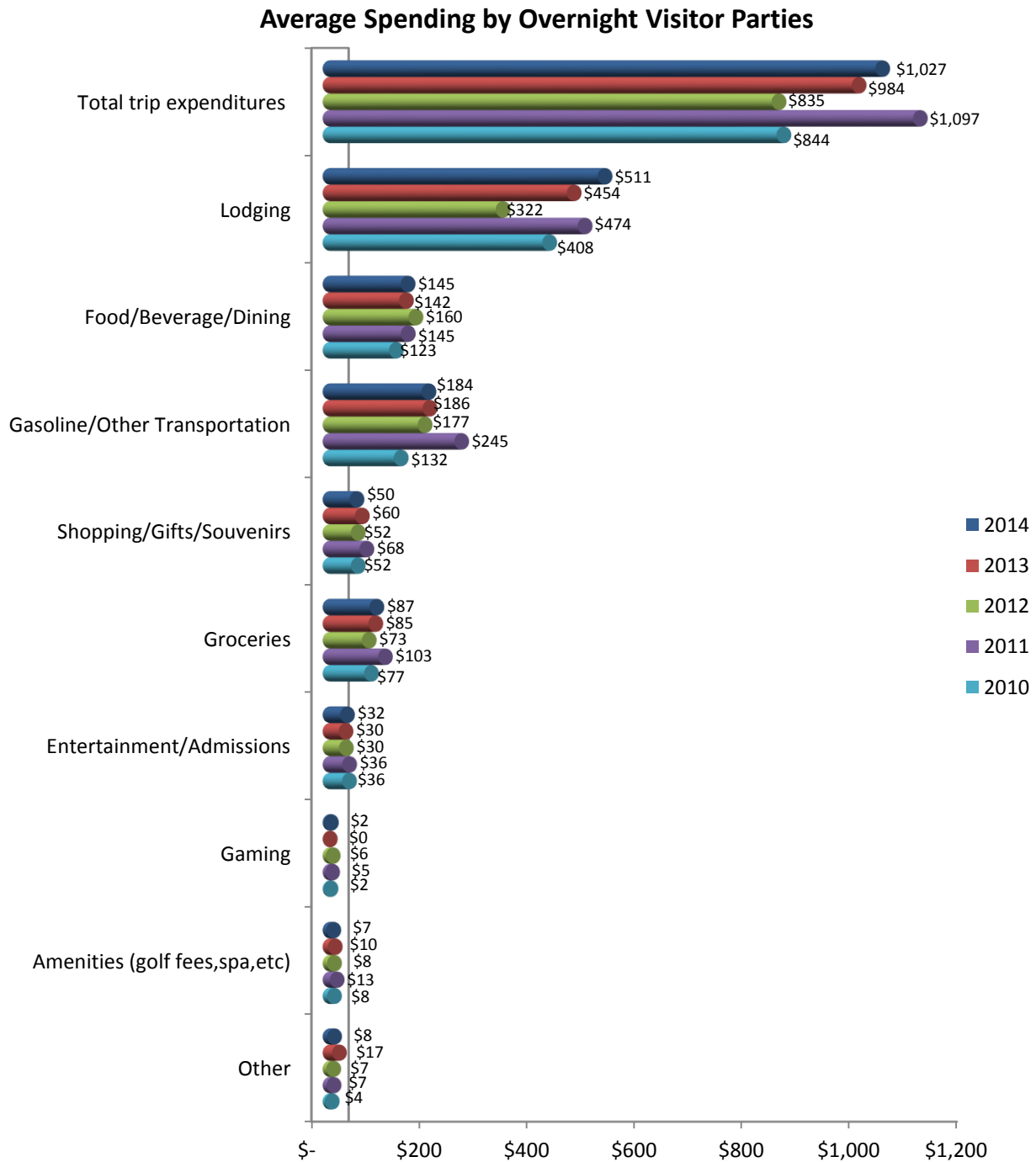
**2014 Top States of Origin of Overnight Visitors to North Carolina's Coastal Region**





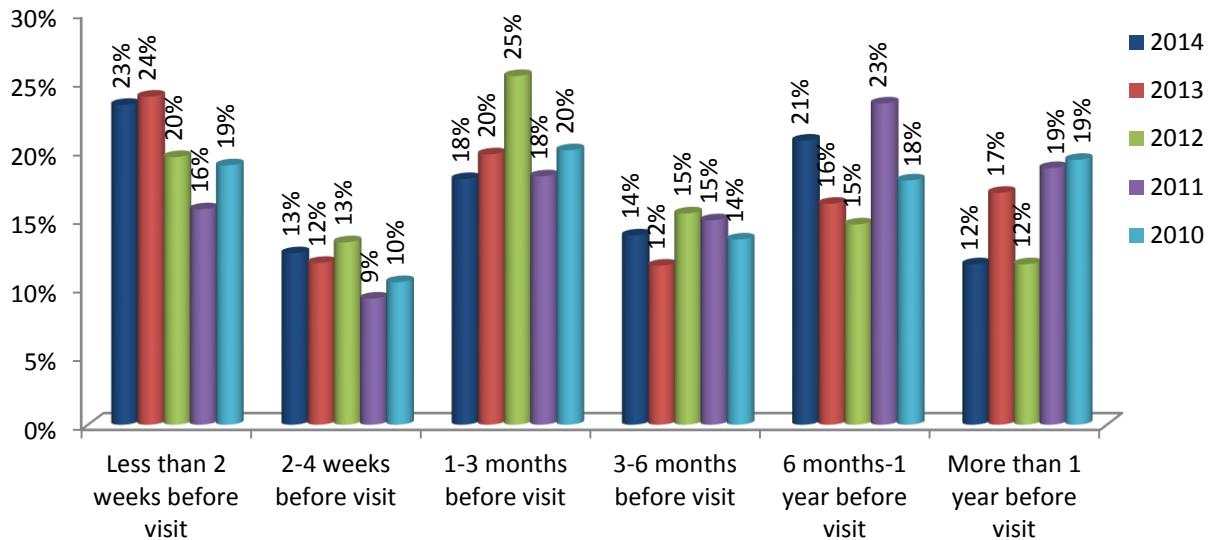
### Amount Spent in Coastal Region

The average overnight visitor party spending in the Coastal Region increased more than four percent from 2013 to 2014. The bulk of the increase was in lodging expenses. Average trip spending was the second highest in the last five years, but when taking into account the shorter length of stay, the daily spending by visitor parties (\$358) was the highest in 2014.



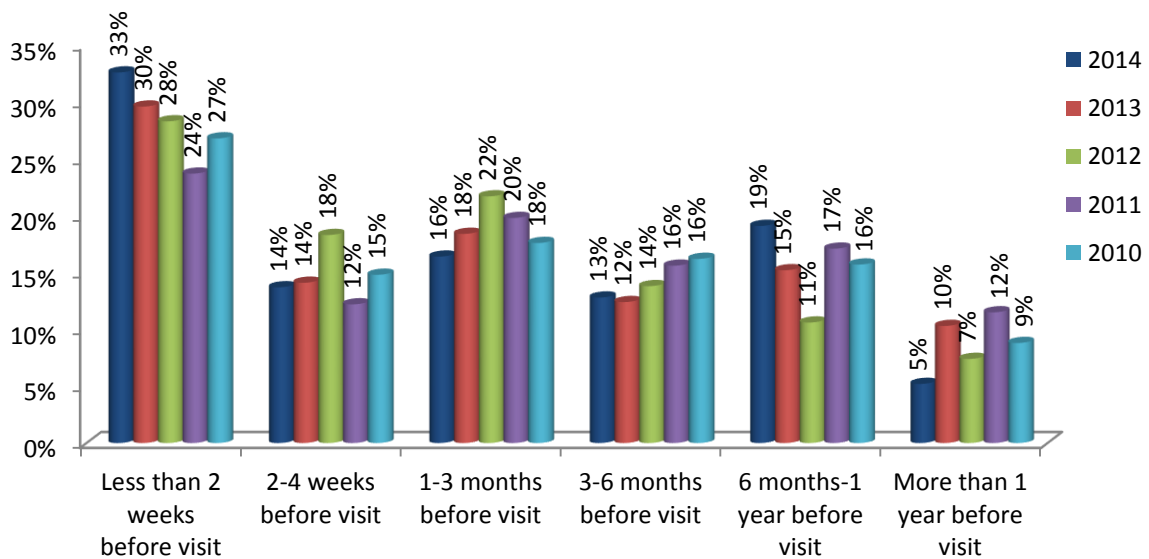
## Travel Planning to Coastal Region

### 2014 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. Nearly 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. However, a third of the region's overnight visitors decide on the travel destination less than two weeks before visiting.

### 2014 Length of Time to *Decide On* NC as Travel Destination



## Activities

The following table 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 sixty percent of the overnight visitors to the region went to a beach and more than twenty-six percent shopped while visiting the coast. Other popular activities included visiting relatives (26%), visiting a state/national park (17%), fine dining (17%), rural sightseeing (17%), visiting friends (16%) and visiting historic sites/churches (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.**

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

Activity	2010	2011	2012	2013	2014
Beach	66.8%	67.5%	70.1%	72.4%	62.3%
Shopping	29.8%	37.3%	25.4%	28.2%	26.6%
Visiting Relatives	37.9%	41.7%	32.2%	30.7%	26.1%
State/National Park	15.5%	18.7%	16.2%	13.0%	16.7%
Fine Dining	25.5%	19.2%	20.2%	15.0%	16.5%
Rural Sightseeing	18.5%	18.2%	16.4%	17.3%	15.9%
Visiting Friends	19.0%	13.3%	15.9%	23.8%	14.6%
Historic Sites/Churches	17.9%	22.2%	19.5%	15.1%	12.7%
Wildlife Viewing	12.4%	13.3%	13.2%	9.0%	12.2%
Museums	10.6%	17.0%	9.6%	13.1%	9.3%
Fishing (fresh or saltwater)	11.1%	9.0%	13.1%	10.5%	8.8%
Zoos/Aquariums/Aviaries	1.8%	4.8%	7.0%	2.4%	8.2%
Urban Sightseeing	9.5%	12.1%	9.4%	7.3%	8.1%
Bird Watching	4.4%	5.5%	3.1%	4.8%	5.5%
Old Homes/Mansions	6.0%	8.4%	5.2%	4.8%	5.2%
Nature Travel/Eco-touring	4.8%	4.2%	3.2%	2.3%	4.4%
Biking/Road Biking/Cycling	6.4%	3.7%	5.1%	3.3%	3.8%
Local/folk arts/crafts*	n/a	n/a	n/a	n/a	3.6%
Art Galleries	3.0%	2.6%	3.1%	2.9%	3.0%
Golf	7.7%	5.8%	6.0%	3.8%	2.9%
Hiking/Backpacking	3.3%	3.0%	2.8%	2.9%	2.9%
Nightclubs/Dancing	4.5%	3.3%	6.4%	5.6%	2.9%
Wine Tasting/Winery Tour	4.5%	1.4%	1.1%	2.2%	2.6%
Theme Park/Amusement Park/Water Park	0.5%	2.1%	1.2%	0.5%	2.6%
Musical performance/show*	n/a	n/a	n/a	n/a	2.5%
Whitewater Rafting/Kayaking/Canoeing	2.4%	1.8%	1.8%	0.8%	2.5%
Scuba diving/snorkeling	0.5%	1.0%	1.3%	0.9%	2.4%
Gardens	3.7%	5.5%	4.0%	3.5%	2.3%
Special Events/Festivals	3.3%	1.9%	2.3%	1.2%	2.2%
Motor boat/Jet ski	0.8%	2.2%	2.2%	3.0%	2.2%
Hang gliding/skydiving/base jumping	0.2%	0.6%	2.0%	0.4%	1.5%
Craft Breweries	n/a	n/a	n/a	1.2%	1.4%
Theater/Drama	3.0%	1.5%	2.6%	2.1%	1.4%
Spa/Health Club	2.7%	1.0%	0.9%	1.3%	1.3%
Other nature (photography, rockhounding, etc.)*	n/a	n/a	n/a	n/a	1.2%
Youth/Amateur/Collegiate/Professional Sporting Event	0.3%	0.1%	1.5%	0.9%	1.1%
High school/college reunion	1.9%	0.1%	0.5%	0.8%	1.0%
Water skiing	0.5%	0.1%	0.6%	0.3%	1.0%

\* New category

## **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-two 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 (88%), and five percent classify themselves as black/African American.

The average Coastal region visitor is 46 years old and more than half (56.2%) of regional overnight visitor parties have a household head with a college degree or higher.

The average household income of a visitor party to the Coastal Region in 2014 was \$75,500 with nearly half (43%) of the visitor parties reporting a household income \$75,000 or more. Thirteen percent had a household income of over \$125,000.

The average North Carolina Coastal Region overnight visitor has 11.4 vacation days each year. More than two-thirds percent (67.7%) of overnight visitor parties reported that the head of household is employed, while twenty percent are retired. The remainder reported "not employed" as work status.

The average household size of a North Carolina Coastal Region overnight visitor party in 2014 was 2.5.

## 2014 Top Advertising Markets

In 2014, the top advertising markets sending overnight visitors to **North Carolina's Coastal Region** were Raleigh-Durham-Fayetteville (20.3%), Charlotte (9.8%), Greensboro-Winston-Salem-High Point (9.0%), Greenville-New Bern-Washington (5.4%), Norfolk-Portsmouth-Newport News, VA (4.9%), Baltimore (4.4%) and New York, NY (4.0%). While twenty percent of the Coastal Region visitors are from the Raleigh-Durham market, the coastal share of all NC visitors from that market is nearly thirty-one percent. Likewise, while nine percent of the region's visitors are from Greensboro-High Point-Winston Salem, the coastal share of all NC visitors from that market is twenty-two percent. 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>2014 % of Total NC Visitors to Region</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>2014 Coastal Share of NC Visitors from DMA</i>	<i>2013 Coastal Share of NC Visitors from DMA</i>	<i>2012 Coastal Share of NC Visitors from DMA</i>	<i>2011 Coastal Share of NC Visitors from DMA</i>
Raleigh-Durham (Fayetteville)	20.3%	20.4%	15.2%	12.1%	30.7%	29.9%	26.2%	20.0%
Charlotte	9.8%	7.3%	6.3%	5.4%	19.1%	15.7%	12.0%	10.3%
Greensboro-High Point- Winston Salem	9.0%	6.2%	10.6%	5.3%	22.0%	18.9%	29.0%	13.7%
Greenville-New Bern-Washington	5.4%	5.5%	7.6%	6.2%	43.8%	30.0%	42.3%	29.1%
Norfolk-Portsmouth- Newport News, VA	4.9%	6.1%	3.5%	1.8%	36.5%	49.7%	26.9%	17.5%
Baltimore	4.4%	1.3%	3.1%	2.4%	51.5%	30.5%	52.2%	23.1%
New York, NY	4.0%	6.0%	5.3%	6.7%	22.9%	27.2%	24.1%	21.5%
Washington DC Metro	3.3%	4.9%	4.0%	5.2%	21.3%	24.0%	19.3%	28.2%
Richmond-Petersburg, VA	3.1%	4.0%	3.2%	4.6%	29.3%	48.5%	34.2%	36.8%
Pittsburgh	2.9%	4.0%	3.4%	3.2%	47.8%	59.7%	58.3%	40.0%
Philadelphia, PA	2.0%	1.9%	1.7%	4.9%	25.8%	18.3%	24.1%	39.0%
Roanoke-Lynchburg	1.6%	1.0%	2.7%	2.1%	12.2%	11.4%	27.5%	23.5%
Wilmington	1.4%	2.3%	1.3%	1.7%	13.2%	19.0%	21.7%	9.8%
Greenville-Spartanburg-Asheville	1.3%	0.8%	1.8%	1.8%	6.3%	3.0%	6.5%	7.4%
Harrisburg-Lancaster-Lebanon-York	1.3%	1.1%	0.7%	1.2%	45.5%	25.4%	23.1%	22.2%
Atlanta	1.2%	0.9%	3.2%	1.5%	3.8%	3.4%	12.7%	3.8%
Boston	1.2%	0.2%	1.0%	0.7%	31.3%	8.3%	21.1%	4.5%
Orlando-Daytona Beach-Melbourne	1.1%	0.4%	0.4%	1.2%	14.8%	5.3%	2.7%	12.0%
Cleveland-Akron, OH	1.0%	0.8%	1.0%	0.9%	22.2%	11.4%	14.3%	10.3%

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

## 2014 Domestic Piedmont Region Travel

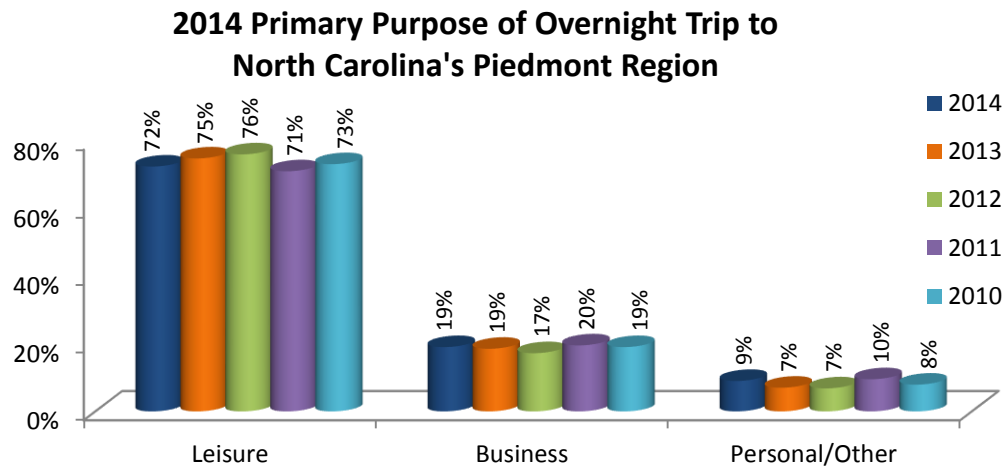
### Summary

- ◆ In 2014, fifty-five percent of North Carolina visitors traveled to North Carolina’s Piedmont Region, approximately 26.4 million person-trips. For marketing purposes, the Piedmont Region is made up of the 49 most central counties of North Carolina.
- ◆ Seventy-four percent of all domestic visitors came to the Piedmont Region for pleasure purposes, while eighteen 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 fall (September - November) and summer (June - August) had slightly higher proportions of visitors, with twenty-seven percent and twenty-six percent of visitors respectively. Winter (December - February) followed with twenty-five percent, and spring (March - May) represented twenty-two percent of the region’s annual visitors. December, October and June were most popular months for piedmont travel.
- ◆ Overnight visitors to the Piedmont Region spent an average of 3.1 nights in the region.
- ◆ Fifty percent of Piedmont Region visitors lodged in a hotel/motel while forty-six percent of visitors stayed in a private home.
- ◆ The average travel party size for all Piedmont Region visitors was 1.8 people. Twenty percent of travel parties to the region included children in the party.
- ◆ Seventy-seven percent of all overnight travelers to the Piedmont Region drove (includes personal automobile, rental, and motorcycle), while seventeen percent traveled by air.
- ◆ In 2014, the average household trip expenditure in the Piedmont Region was \$466. The average household trip expenditure for overnight visitors to the Piedmont Region was \$596. Daytrip parties to the Piedmont region spent approximately \$141 per visit in 2014.
- ◆ The top states of origin of *overnight* visitors to the Piedmont Region in 2014 were North Carolina (31.5%), South Carolina (11.9%), Virginia (8.6%), Georgia (8.1%) and New York (7.1%).
- ◆ Fifty-six percent of the households that traveled to North Carolina’s Piedmont Region in 2014 had a household income over \$50,000.
- ◆ In 2014, Raleigh/Durham/Fayetteville (10.2%), was the top advertising market of origin for *overnight* travelers to the Piedmont Region, followed by Charlotte (8.9%), Greensboro/High Point/Winston-Salem (8.3%), Atlanta (6.2%), New York (4.5%), Greenville-Spartanburg-Asheville-Anderson (3.9%) and Roanoke-Lynchburg, VA (3.4%).

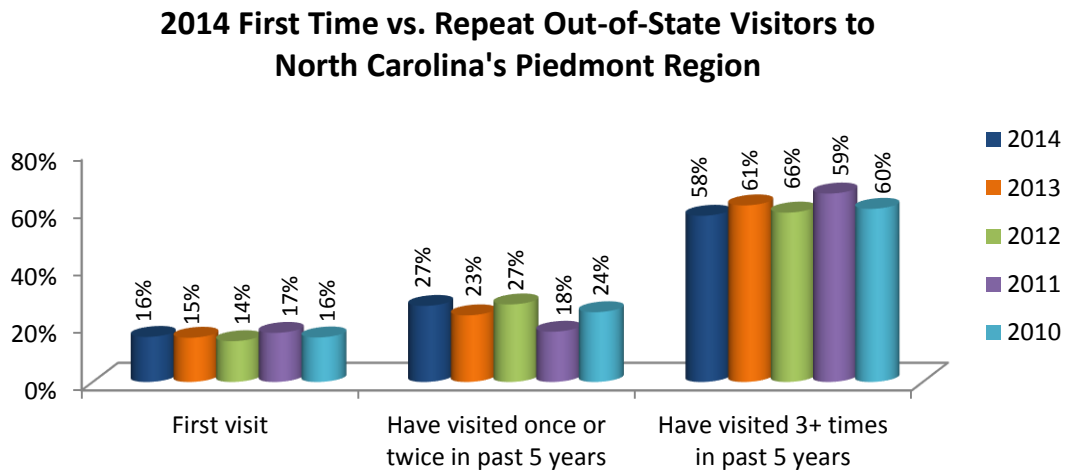
## Piedmont Region Overnight Visitor Profile

### Main Purpose of Visit

In 2014, seventy-two 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 visitors represented nineteen percent of the region’s visitors.



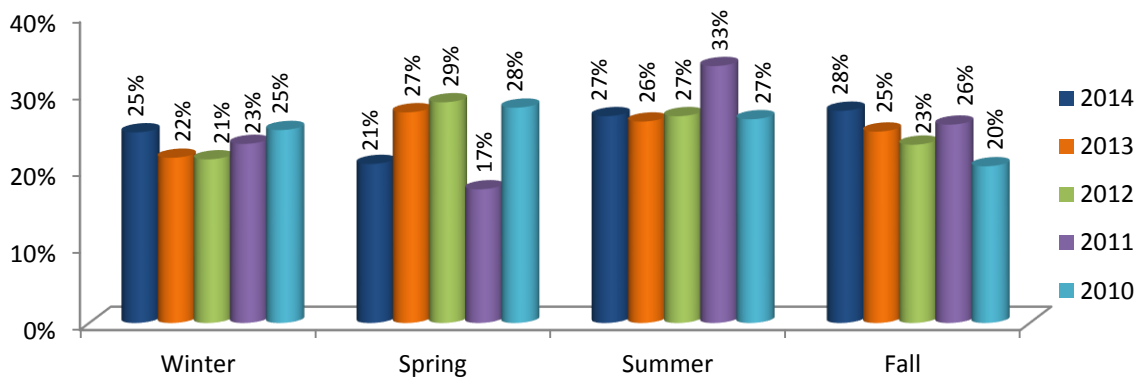
Repeat visitors to North Carolina comprised the largest proportion of Piedmont Region visitors from out-of-state.



### Travel Volume by Season

Though the Piedmont Region typically sees more consistent visitation throughout the year than the other two regions, 2014 saw the fall increase in proportion of visitors from twenty-five percent to twenty-eight percent and winter increase from twenty-two percent to twenty-five percent. The spring season (March through May) decreased in the proportion of visitors from 2013 to 2014, from twenty-seven percent to twenty-one percent.

**2014 Overnight Travel by Season to North Carolina's Piedmont Region**



### Average Length of Stay

In 2014, an average of 3.1 nights was spent by visitors to North Carolina’s Piedmont Region. This was an increase from the 2013 average length of stay of 2.7 nights. Data indicates that out-of-state visitors stay an average of 3.4 nights, while in-state visitors stay an average of 2.4 nights.

### Travel Party Size

The average travel party size for all Piedmont Region overnight visitors was 1.8 people.

### Children on Trip

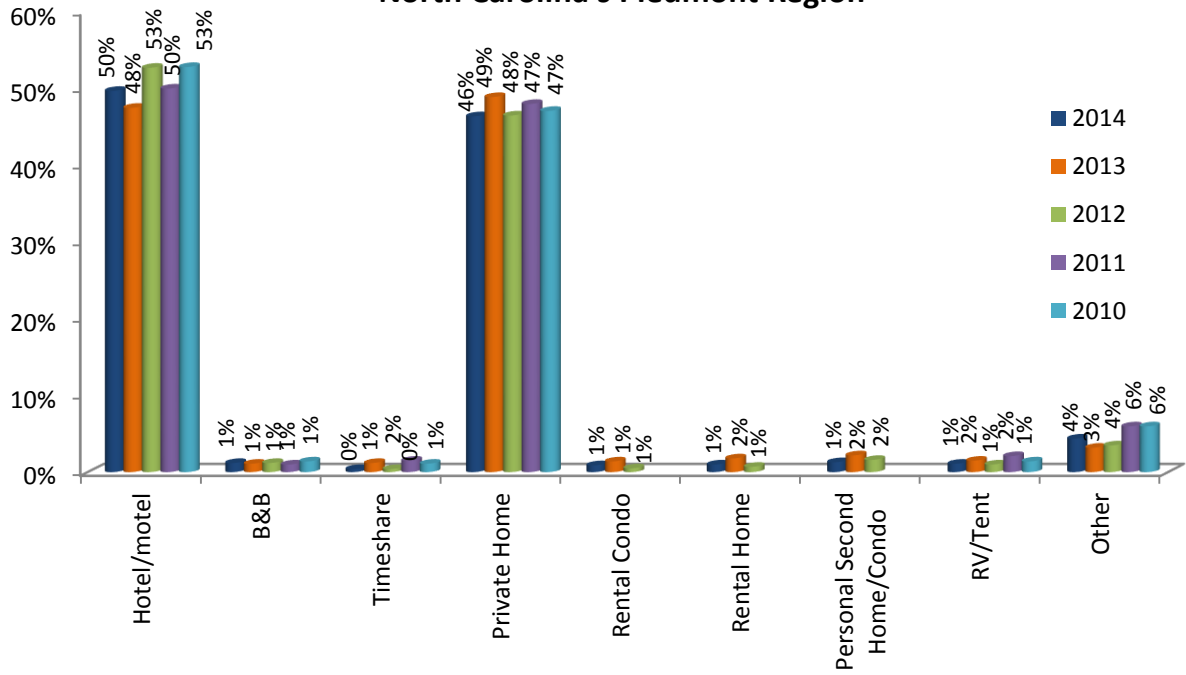
Seventeen percent of overnight visitor parties to the Piedmont Region included children. Among those who traveled with children, the average number of children on trips was 1.9.



### Lodging Used in Piedmont Region

In 2014, half of Piedmont Region visitors stayed in a hotel/motel, while nearly half (46%) 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%.

**2014 Lodging by Overnight Visitors to North Carolina's Piedmont Region**

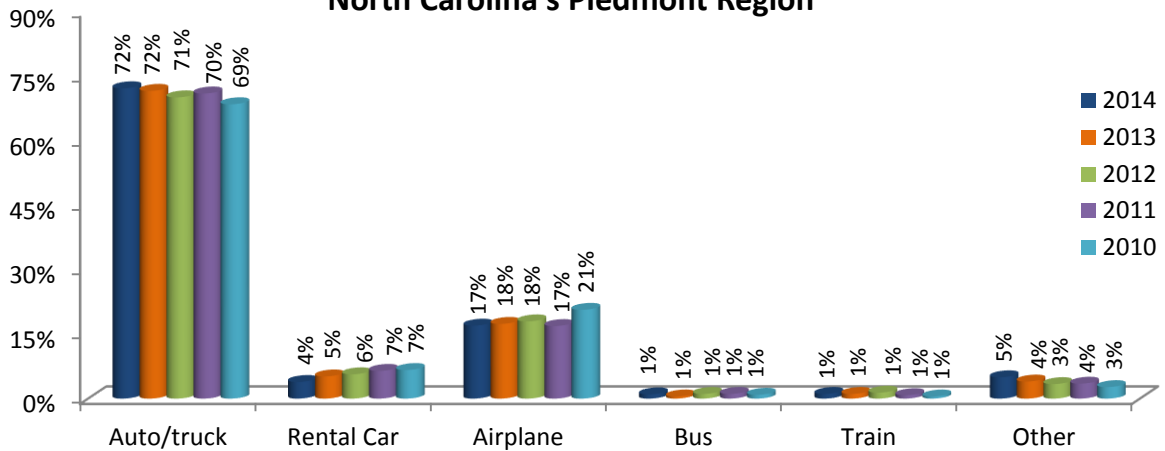


\*percentages add to more than 100% due to multiple responses.

### Mode of Transportation

In 2014, the personal auto was most used form of transportation (72%) to the Piedmont Region, however seventeen percent traveled by air.

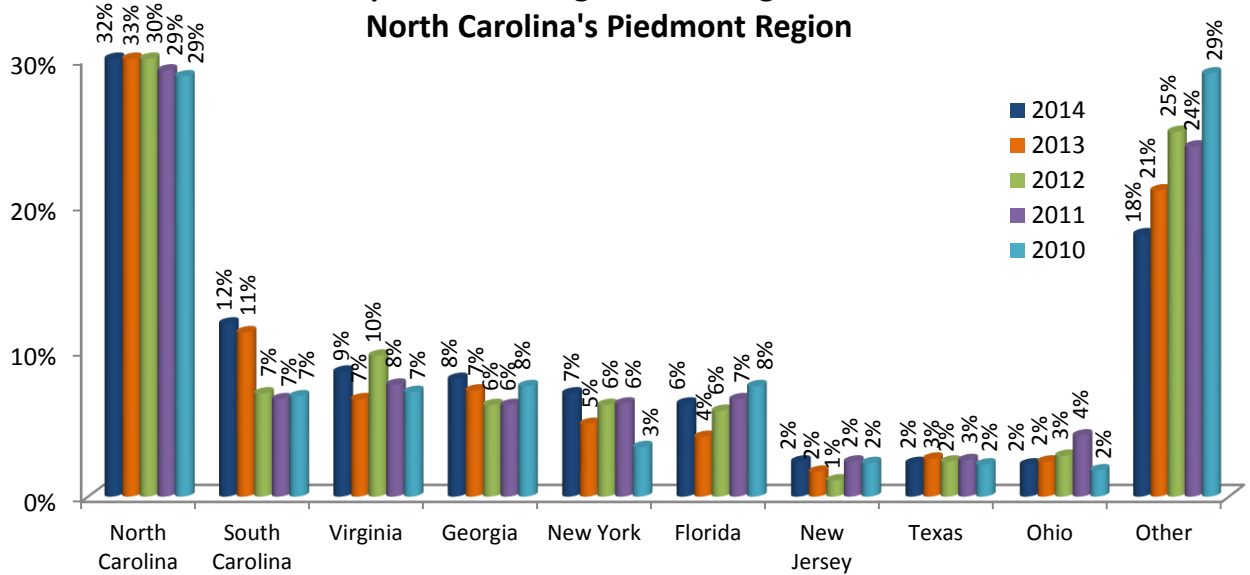
**2014 Primary Mode of Transportation to North Carolina's Piedmont Region**



### Origin of Visitors

In 2014, the top states of origin for Piedmont Region overnight visitors included North Carolina (32%), South Carolina (12%), Virginia (9%), Georgia (8%), New York (7%), Florida (6%) and New Jersey (2%). The proportion of visitors to the Piedmont from Virginia, New York and Florida increased from 2013 to 2014.

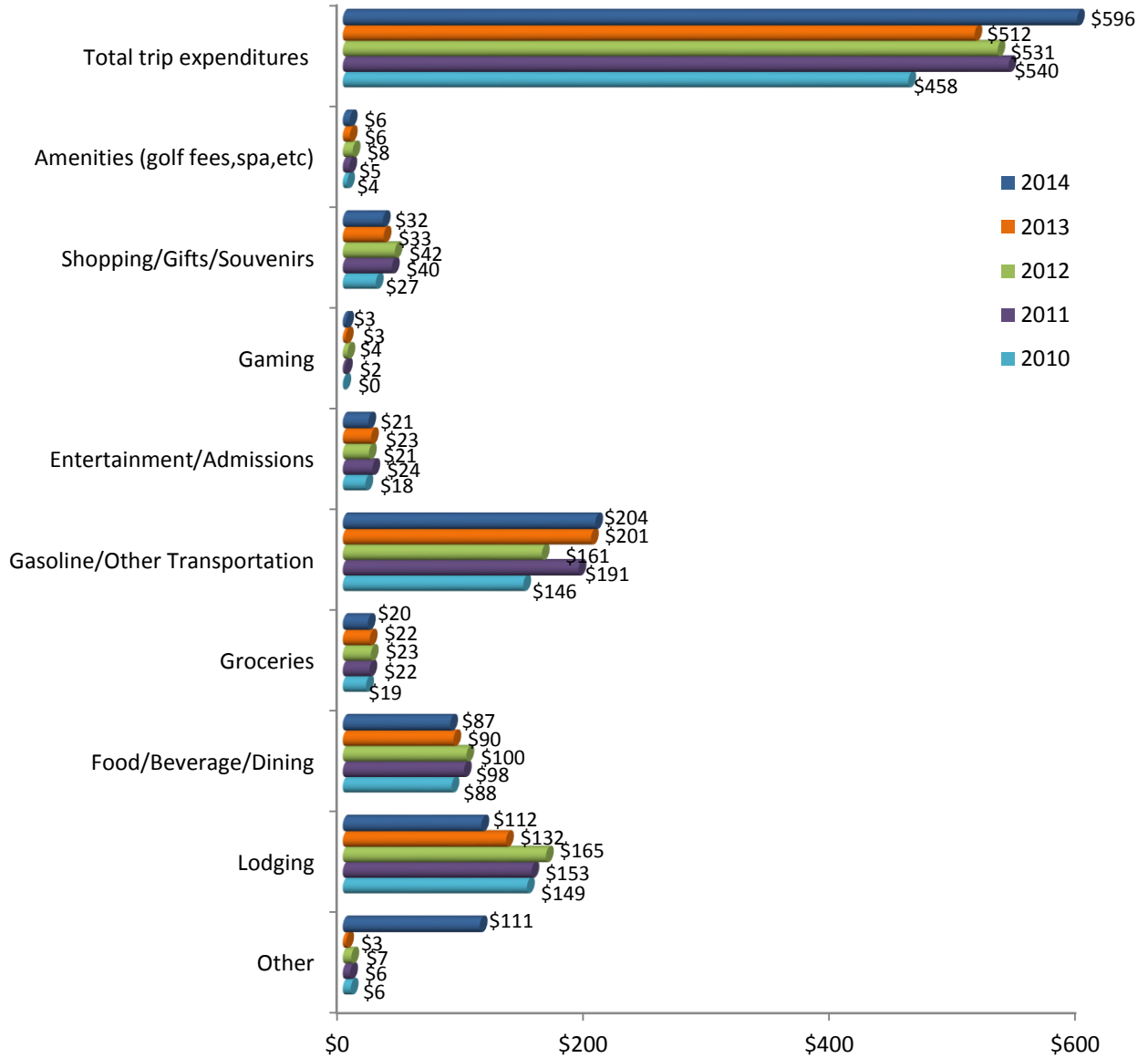
**2014 Top States of Origin of Overnight Visitors to North Carolina's Piedmont Region**



### Amount Spent in Piedmont Region

The average overnight visitor party spending in the Piedmont Region was \$596, up somewhat from \$512 in 2013. Most of the increase came from “other” expenditures that are not captured by existing categories.

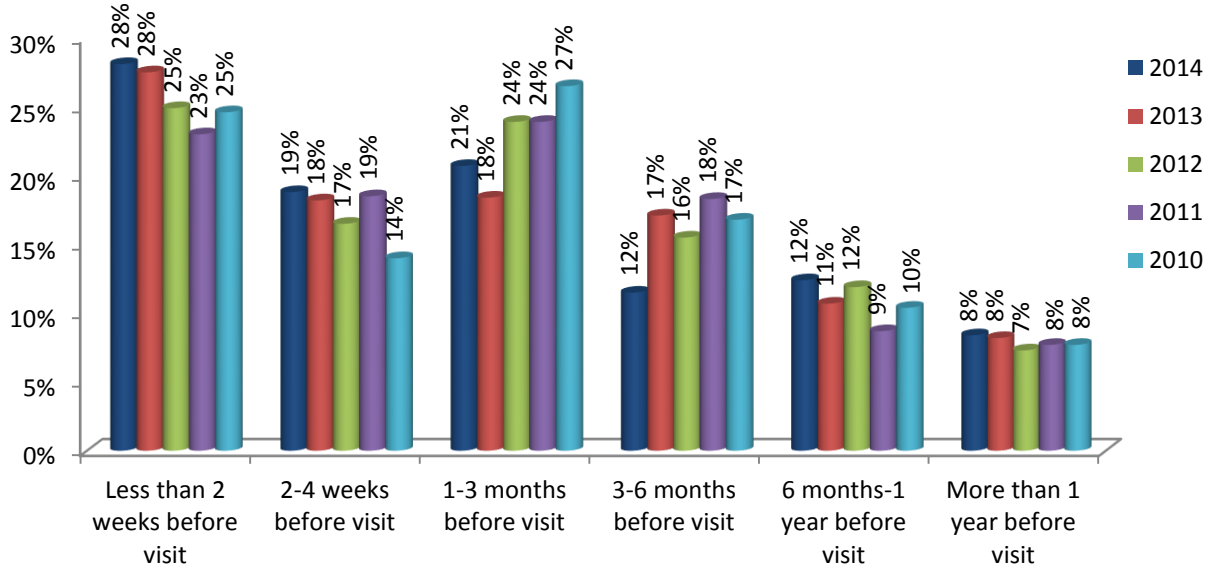
**2014 Average Spending by Overnight Visitor Parties in North Carolina's Piedmont Region**



\*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.

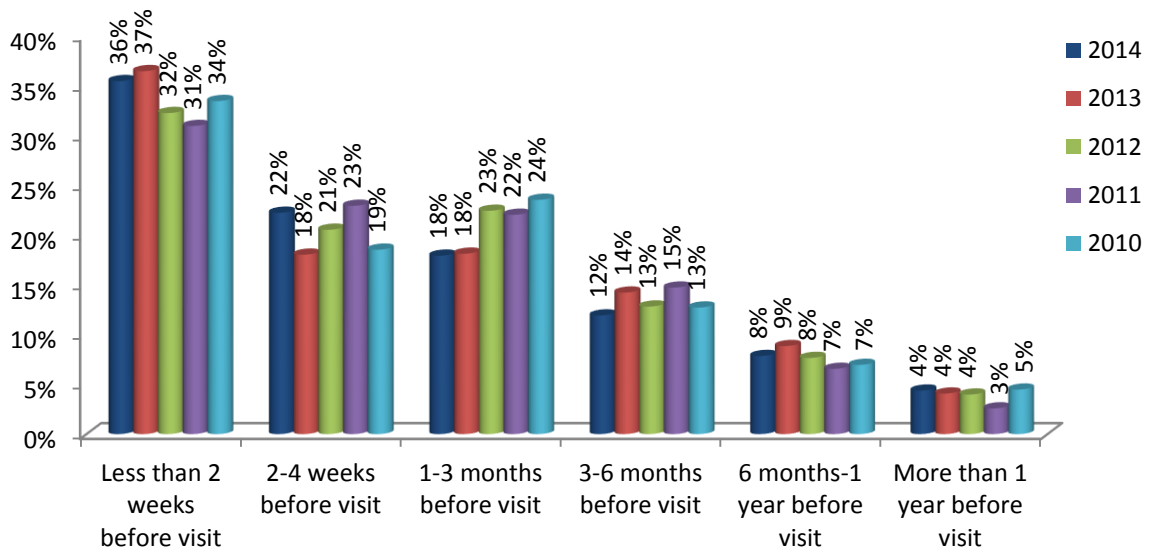
## Travel Planning to Piedmont Region

### 2014 Length of Time to *Consider* NC as Travel Destination



Piedmont Region overnight visitors consider and decide to visit North Carolina within a shorter time frame than North Carolina visitors as a whole. Nearly half of Piedmont Region visitors *considered* the state one month or less ahead of travel, and fifty-eight percent *decided* to visit less than one month prior to travel.

### 2014 Length of Time to *Decide On* NC as Travel Destination



## 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. Twenty percent shopped and nearly twenty percent (19%) visited friends. Other popular activities included fine dining (11%), visiting historic sites/churches (8%), museums (8%), urban sightseeing (7%) and rural sightseeing (7%). ***\*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.***

### Activities Participated in by Overnight Visitors to North Carolina’s Piedmont Region

Activity	2010	2011	2012	2013	2014
Visiting relatives	44.1%	40.2%	39.9%	40.3%	39.5%
Shopping	16.9%	20.1%	21.5%	20.3%	19.8%
Visiting friends	21.7%	20.5%	19.4%	18.8%	18.9%
Fine dining	13.4%	14.5%	13.3%	14.8%	10.6%
Historic sites/churches	5.1%	7.7%	7.1%	5.4%	8.3%
Museums	7.1%	7.8%	6.6%	9.4%	7.5%
Urban sightseeing	9.4%	10.3%	8.5%	8.2%	7.3%
Rural sightseeing	8.5%	10.3%	10.6%	8.8%	6.9%
Nightclub/dancing	6.0%	5.9%	6.2%	6.6%	5.9%
State/National Park	4.4%	5.2%	3.9%	4.2%	5.8%
Old homes/mansions	3.5%	4.2%	2.8%	3.5%	5.1%
Youth/amateur/collegiate sporting events	3.1%	1.9%	2.4%	2.0%	4.1%
Theme park/Amusement park/Water park	2.2%	1.4%	2.5%	2.6%	3.9%
Special events/Festivals	2.0%	3.3%	4.3%	3.3%	3.8%
Art galleries	2.0%	3.6%	4.3%	4.4%	3.5%
Wildlife viewing	3.0%	2.5%	3.9%	2.0%	3.2%
Wine tasting/winery tour	1.2%	2.0%	2.4%	1.9%	3.2%
Craft Breweries*	n/a	n/a	n/a	2.2%	3.0%
Zoos/Aquariums Aviaries	1.8%	1.4%	2.1%	2.0%	2.5%
Hiking/Backpacking/Canyoneering	2.1%	2.4%	2.2%	3.6%	2.3%
Golf	2.6%	2.2%	1.9%	2.2%	2.2%
Motor sports	3.8%	3.8%	3.2%	2.5%	2.0%
Theater/drama	2.5%	2.0%	1.8%	2.5%	1.8%
Gardens	3.2%	3.2%	3.5%	3.2%	1.7%
Musical Theater	0.3%	1.4%	1.1%	2.7%	1.7%
Spa/health club	1.4%	1.9%	1.2%	2.9%	1.5%
Local/folk arts/crafts*	n/a	n/a	n/a	n/a	1.5%
Bird Watching	1.7%	1.8%	1.5%	1.7%	1.4%
Fishing	2.1%	0.8%	2.2%	1.5%	1.3%
Musical performance/show*	n/a	n/a	n/a	n/a	1.2%
Farms/ranches/agri-tours*	n/a	n/a	n/a	n/a	1.2%
Nature travel/ecotouring	1.1%	2.5%	2.2%	1.3%	1.1%

\*new category

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

More than half of the Piedmont Region’s overnight visitors (51.9%) of the visitors are married and twenty-four 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 (83.6%), and nearly eleven percent classify themselves as black/African American.

The average Piedmont Region visitor is 46 years old and nearly two-thirds (63.8%) of regional overnight visitor parties have a household head with a college degree or higher.

The average household income of a visitor party to the Piedmont Region in 2014 was \$74,290. More than one-third (38.8%) of the visitor parties that traveled to North Carolina’s Piedmont Region in 2014 had a household income \$75,000 or over. Thirteen percent had a household income of over \$125,000.

The average North Carolina Piedmont Region overnight visitor has 11.6 vacation days each year. Nearly two-thirds percent (63.3%) of overnight visitor parties reported that the head of household is employed, while sixteen percent are retired. The remainder reported “not employed” as work status.

The average household size of a North Carolina Piedmont Region overnight visitor party in 2014 was 2.4.

## 2014 Top Advertising Markets

In 2014, the top advertising markets sending overnight visitors to **North Carolina's Piedmont Region** were Raleigh-Durham-Fayetteville (10.2%), Charlotte (8.9%), Greensboro-High Point-Winston Salem (8.3%), and Atlanta (6.2%). 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>2014 % of Total NC Visitors to Region</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>2014 Piedmont Share of Visitors from DMA</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>
Raleigh-Durham (Fayetteville)	10.2%	11.6%	9.3%	10.4%	35.4%	38.5%	38.9%	25.6%
Charlotte	8.9%	10.7%	9.0%	11.6%	40.2%	51.4%	41.1%	35.0%
Greensboro-High Point-Winston Salem	8.3%	5.4%	5.1%	5.3%	46.5%	37.0%	33.8%	22.6%
Atlanta	6.2%	5.5%	3.5%	4.3%	42.3%	44.9%	33.3%	22.0%
New York, NY	4.5%	4.2%	4.9%	5.1%	57.1%	43.2%	54.0%	34.4%
Greenville-Spartanburg-Asheville-	3.9%	5.3%	4.2%	3.3%	43.8%	50.9%	38.1%	25.3%
Roanoke-Lynchburg	3.4%	2.7%	2.6%	1.9%	63.3%	73.0%	62.5%	35.3%
Columbia	3.0%	3.6%	2.8%	0.8%	60.0%	70.7%	76.5%	14.3%
Wilmington	2.6%	2.3%	1.5%	2.4%	60.5%	41.1%	65.2%	36.6%
Norfolk-Portsmouth-Newport News	2.3%	0.9%	2.6%	3.0%	38.5%	18.0%	46.2%	56.3%
Richmond-Petersburg	2.1%	0.6%	2.0%	1.4%	46.3%	17.1%	50.0%	30.8%
Philadelphia	2.1%	2.6%	1.7%	1.5%	58.1%	55.9%	55.2%	22.0%
Washington DC Metro	2.0%	3.5%	4.0%	3.2%	29.5%	37.8%	45.8%	26.8%
Orlando-Daytona Beach-Melbourne	1.8%	1.6%	1.2%	2.0%	59.3%	40.7%	41.4%	35.3%
Greenville-New Bern-Washington	1.7%	3.0%	2.8%	4.6%	31.3%	37.0%	38.0%	32.6%
Savannah	1.7%	0.5%	1.1%	0.5%	84.2%	41.7%	52.6%	42.9%
Elmira (Corning)	1.6%	0.2%	0.1%	0.1%	100.0%	100.0%	100.0%	100.0%
Charleston, SC	1.5%	0.8%	1.3%	1.2%	43.3%	25.9%	54.5%	46.7%

## 2014 Domestic Mountain Region Travel

### Summary

- ◆ In 2014, twenty-four percent of North Carolina visitors traveled to North Carolina’s Mountain Region, approximately 11.4 million person-trips. For marketing purposes, the Mountain Region is made up of the 23 western-most counties of North Carolina.
- ◆ Eight-five percent of domestic visitors came to the Mountain Region for pleasure purposes, while eight percent of visitors came to conduct business (includes meeting/convention). The remaining seven percent reported “other” purpose of visit.
- ◆ Travel to the Mountain Region of North Carolina was heaviest in the fall and winter. The fall (September - November) had the highest proportion of visitors, with thirty percent of all 2014 Mountain Region visitors. The winter (December – February) followed with nearly twenty-nine percent of visitors, followed by summer (June – August) with twenty-four percent and spring (March - May) with nearly seventeen percent. December was the single largest month for mountain travel with more than fifteen (15.2%) percent.
- ◆ Overnight visitors to the Mountain Region spent an average of 2.5 nights in the region.
- ◆ Fifty-three percent of Mountain Region visitors lodged in a hotel/motel, while twenty-five percent stayed at a private home. Nearly seven percent reported staying in a bed and breakfast, and nearly seven percent stayed in a rental home.
- ◆ The average travel party size for all Mountain Region visitors was 2.0 people. Twenty-six percent of all travel parties to the region included children in the party.
- ◆ Ninety-five percent of *overnight* travelers to the Mountain Region drove (includes personal automobile, rental vehicle, RV/camper), while four percent traveled by air.
- ◆ In 2014, the average trip expenditure in the Mountain Region was \$556. The average trip expenditure for overnight visitors to the Mountain Region was \$702. Daytrip parties to the Mountain Region spent approximately \$169 per visit.
- ◆ The top states of origin of *overnight* visitors to the Mountain Region were North Carolina (30.9%), Georgia (18.5%), South Carolina (12.6%), Florida (9.3%) and Tennessee (7.5%).
- ◆ Sixty-four percent of the households that traveled to North Carolina’s Mountain Region in 2014 had a household income over \$50,000.
- ◆ In 2014, Atlanta (16.5%) was the top DMA of origin for *overnight* travelers to the Mountain Region, followed by Charlotte (13.3%), Greenville/Spartanburg/Anderson, SC/Asheville (7.4%), Greensboro/High Point/Winston-Salem (7.3%) and Raleigh/Durham/Fayetteville (6.4%).

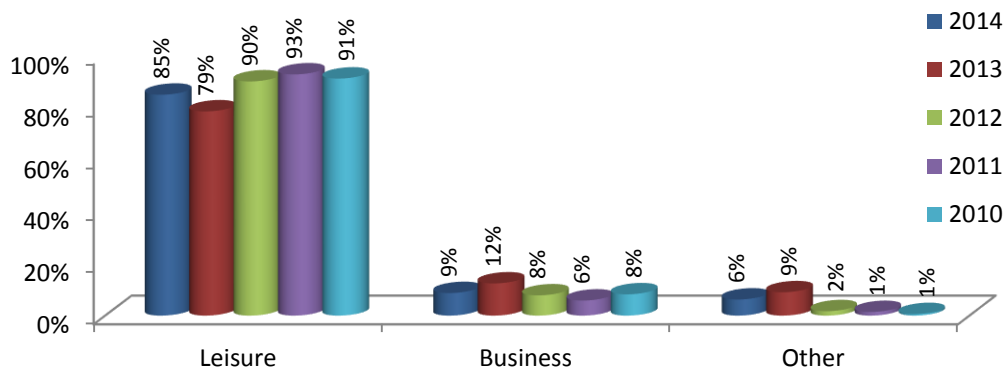


## Mountain Region Overnight Visitor Profile

### Main Purpose of Visit

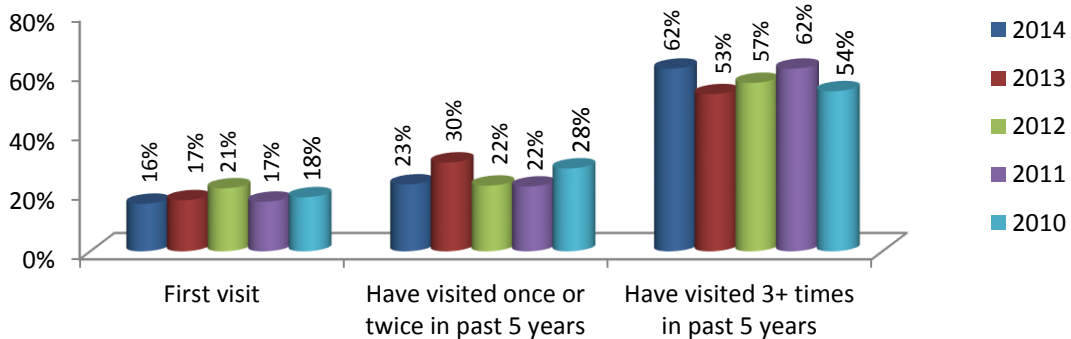
In 2014, eighty-five percent of domestic overnight visitors came to the Mountain Region for leisure purposes, which included visiting friends and relatives, outdoor recreation and entertainment/sightseeing, an increase from 79% in 2013. Nine percent of domestic overnight visitors came for general business, convention, seminar or other group meeting. Six percent traveled to the Mountain Region to conduct “other” business.

**2014 Primary Purpose of Overnight Trip to North Carolina's Mountain Region**



The proportion of first time out-of-state visitors to North Carolina’s Mountain Region was sixteen percent in 2014, while the majority of out-of-state overnight visitors (62%) have visited more than three times in the past five years.

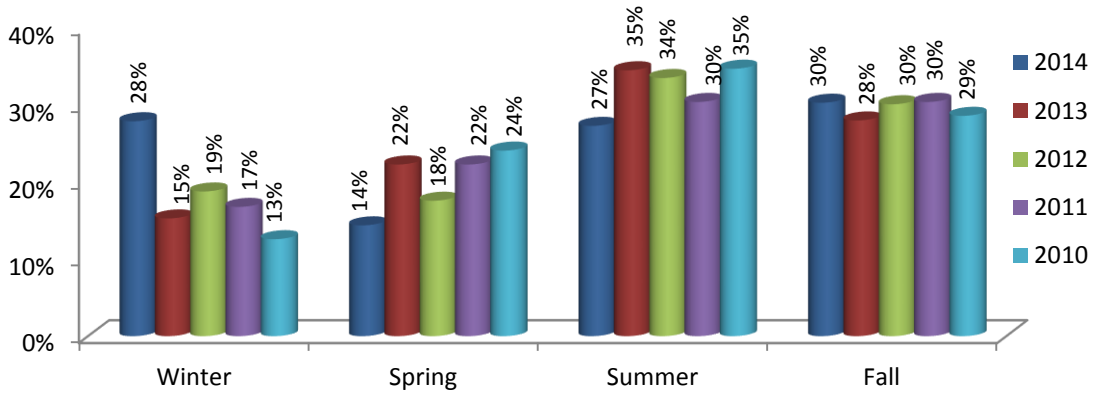
**2014 First Time vs. Repeat Out-of-State Visitors to North Carolina's Mountain Region**



### Travel Volume by Season

When examining visitation based on the typical seasonal schedule, the fall (September through November) season was the most popular in terms of proportion of overnight visitors to the Mountain Region in 2014 with just more than thirty percent. Winter (December through February) followed with twenty-eight percent, a much larger proportion of overnight visitors to the region than in previous years. The summer season (June through August) was next with twenty-seven percent, followed by spring (March through May) with fourteen percent.

**2014 Overnight Travel by Season to North Carolina's Mountain Region**



### Average Length of Stay

In 2014, an average of 2.5 nights was spent by visitors to North Carolina’s Mountain Region. Data indicates that out-of-state visitors stay an average of 2.8 nights, while in-state visitors stay an average of 1.9 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 several years.

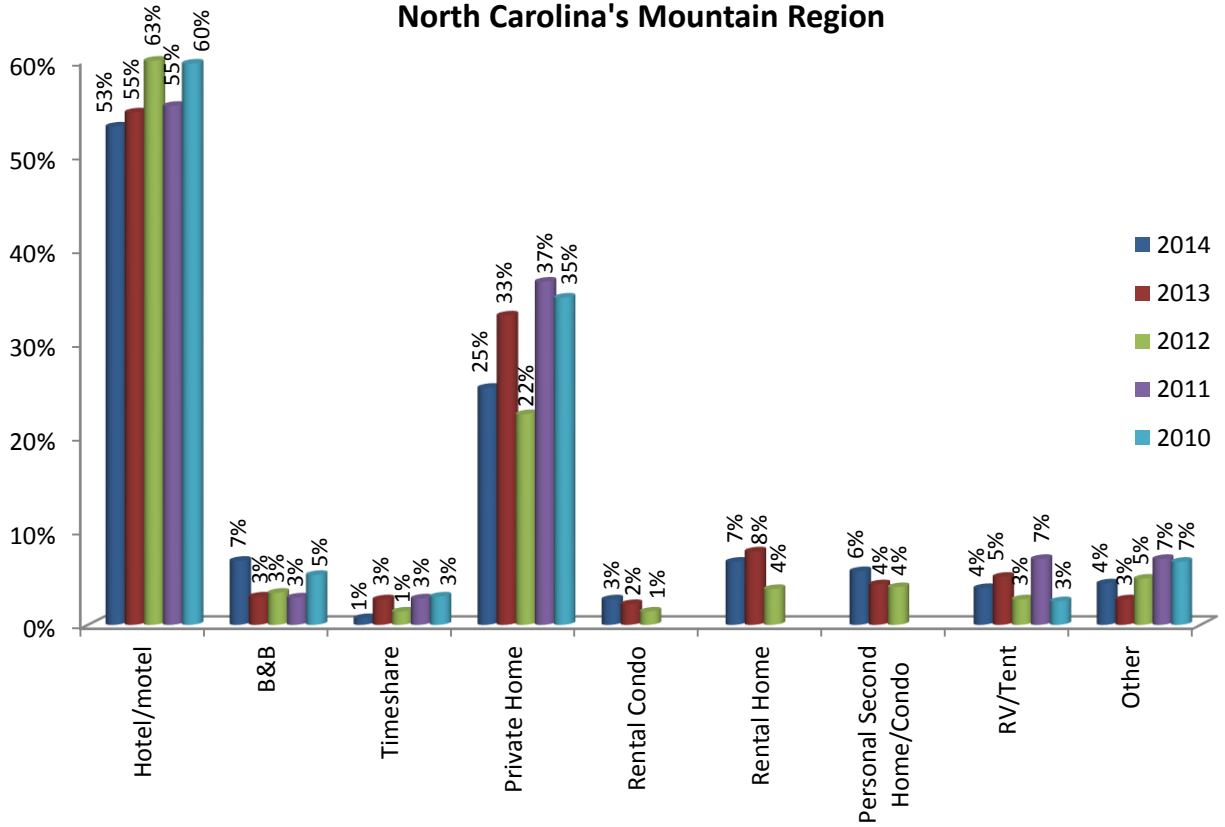
### Children on Trip

Twenty-six 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 2014, more than half of Mountain Region visitors stayed in a hotel/motel (53%). Twenty-five percent lodged in a private home, seven percent stayed in a bed and breakfast and seven percent stayed in a rental 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.

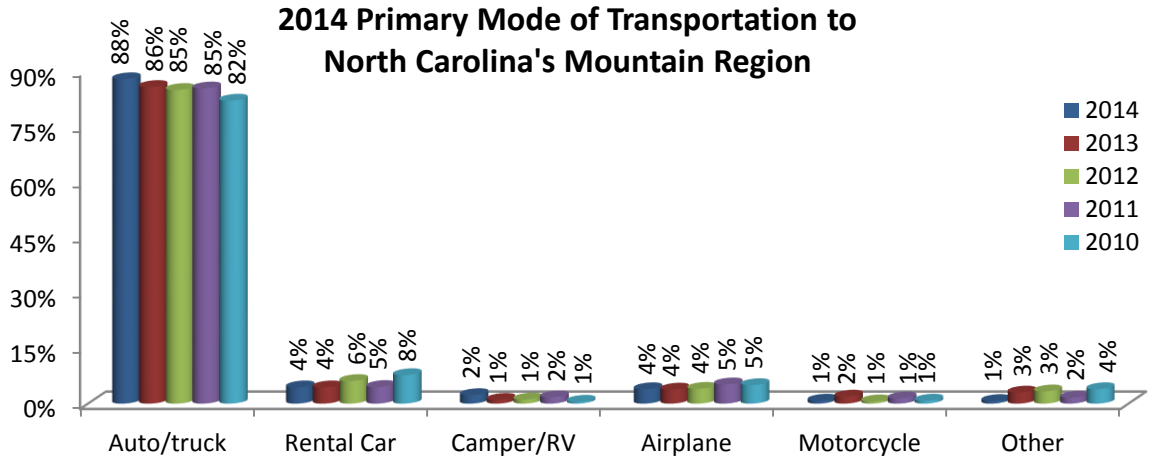
**2014 Lodging by Overnight Visitors to North Carolina's Mountain Region**



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

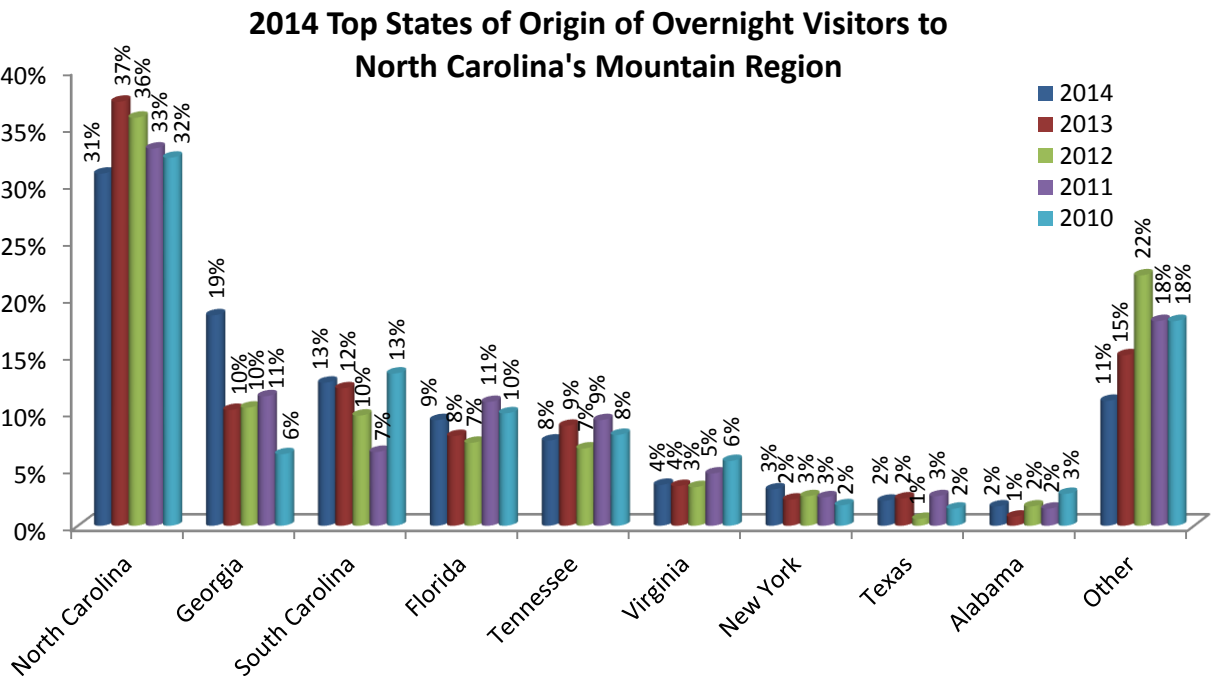
### Mode of Transportation

In 2014, the personal auto was by far the dominant form of transportation (88%) to the Mountain Region, while four percent traveled by air.



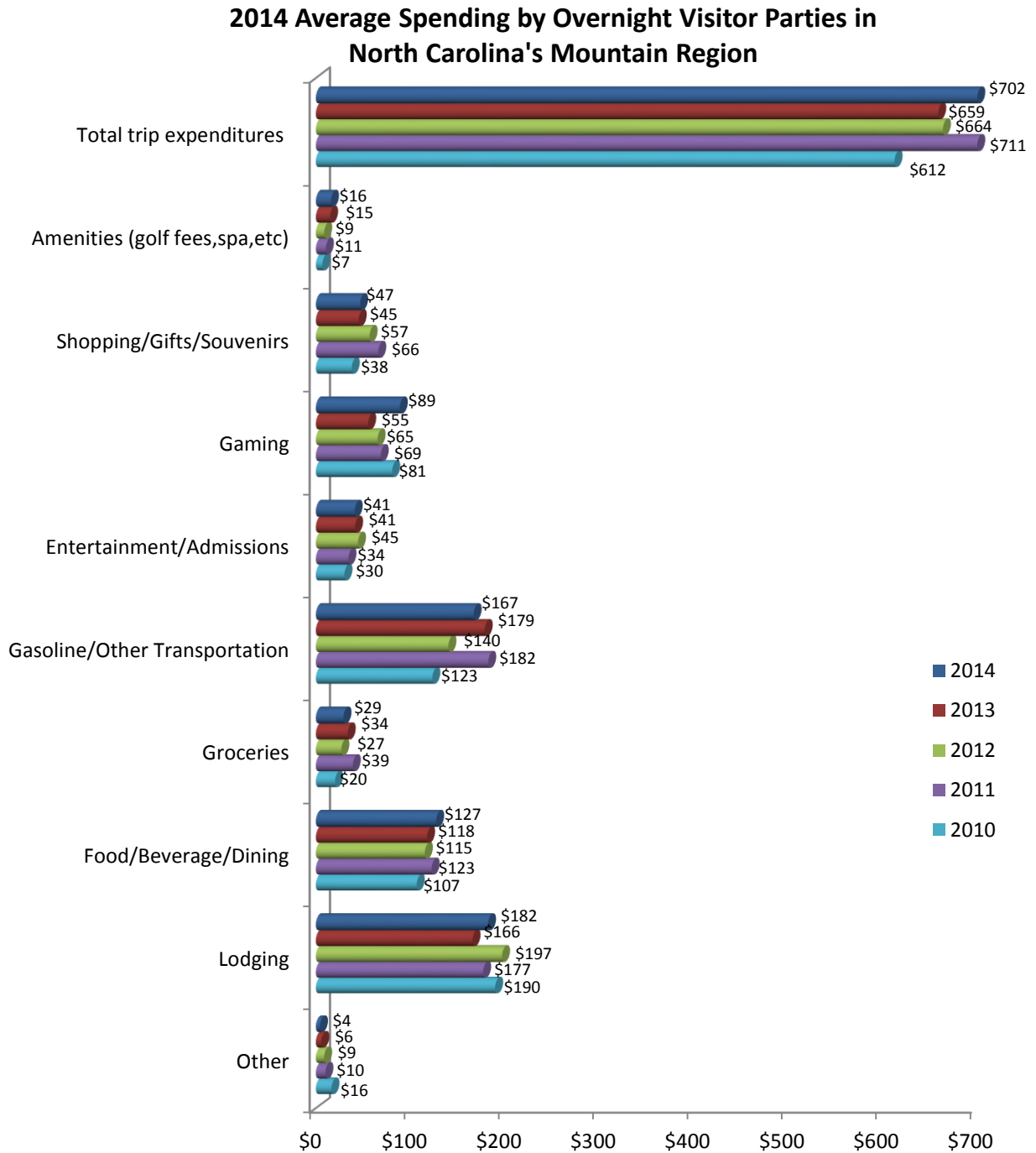
### Origin of Visitors

In 2014, the top states of origin for Mountain Region overnight visitors included North Carolina (31%), Georgia (19%), South Carolina (13%), Florida (9%) and Tennessee (8%). The proportion of in-state overnight visitors dropped from 2013 to 2014, while the proportion of overnight visitors from Georgia increased from ten percent in 2013 to nineteen percent in 2014.



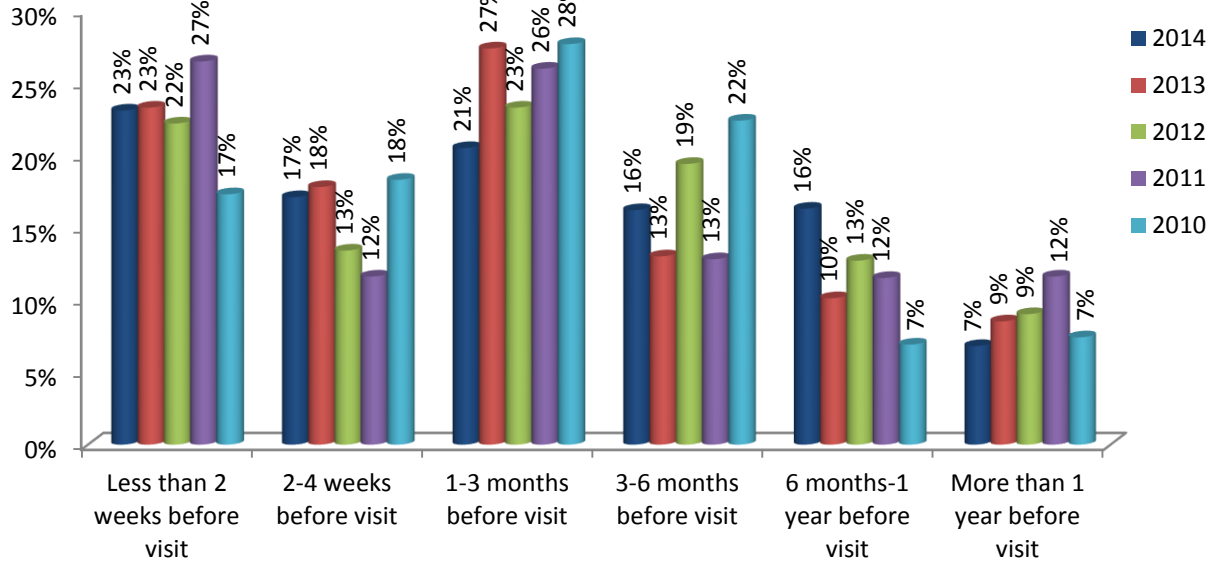
### Amount Spent in Mountain Region

The average overnight visitor party spending in the Mountain Region was \$702, up from 2013. Most of the increase in average spending came from the gaming, food/beverage/dining and lodging categories.



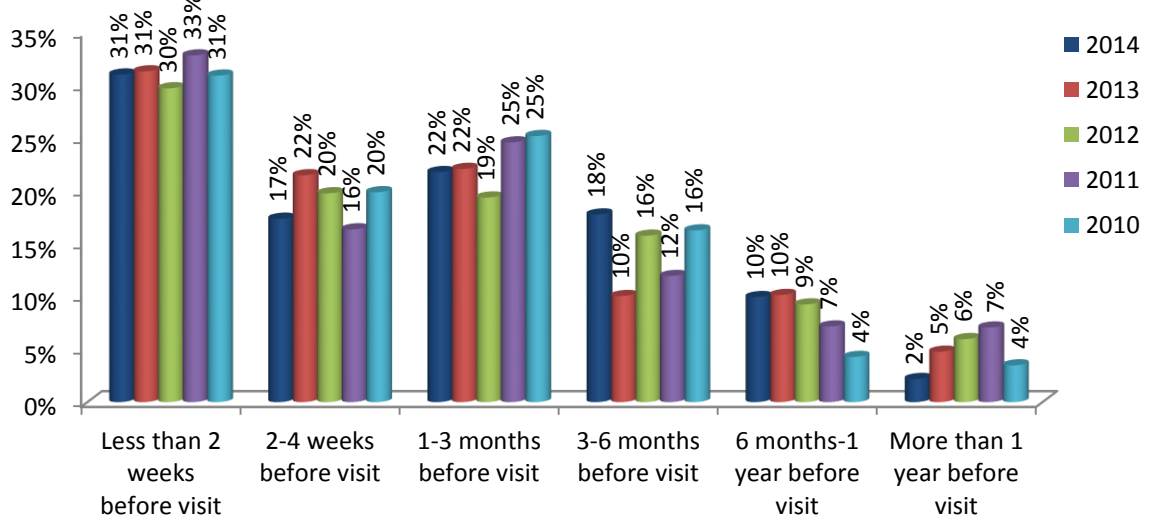
## Travel Planning to Mountain Region

### 2014 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-three percent of Mountain Region visitors *considered* the state less than two weeks ahead of travel, but twenty-three percent *considered* the visit more than six months prior to travel as well. Decisions to make travel for Mountain Region visitors and NC visitors in general were very similar, though Mountain Region visitors tend to make the decision to visit in a slightly shorter time frame.

### 2014 Length of Time to *Decide On* NC as Travel Destination



## Activities

The following table 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 visited with relatives (30% in 2014 vs. 26% in 2013), visited a state/national park (23% in 2014 vs. 20% in 2013), visited museums (14% in 2014 vs. 9% in 2013) and participated in wildlife viewing (14% in 2014 vs. 9% in 2013) increased from 2013-2014.

**\*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.**

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

Activity	2010	2011	2012	2013	2014
Visiting relatives	26.9%	22.7%	22.6%	26.3%	30.3%
Shopping	27.2%	28.9%	25.6%	29.0%	26.0%
Rural sightseeing	29.8%	36.5%	28.4%	31.8%	25.7%
State/National Park	20.9%	24.4%	19.0%	19.7%	23.0%
Fine dining	18.5%	19.5%	18.0%	21.2%	17.8%
Historic sites/churches	13.1%	22.3%	15.5%	15.5%	15.8%
Old homes/mansions	14.3%	15.8%	12.7%	14.4%	15.2%
Casino/gaming	14.5%	14.5%	15.0%	13.7%	14.4%
Museums	10.8%	9.7%	9.2%	8.9%	14.2%
Wildlife viewing	9.5%	16.1%	11.6%	8.6%	14.1%
Visiting friends	15.8%	19.6%	16.1%	15.1%	13.3%
Urban sightseeing	9.6%	13.6%	9.5%	9.7%	11.9%
Art galleries	5.9%	8.3%	10.3%	9.3%	10.7%
Hiking/Backpacking/Canyoneering	12.4%	13.0%	13.0%	15.6%	10.3%
Local/folk arts/crafts*	n/a	n/a	n/a	n/a	10.3%
Wine tasting/winery tour	5.1%	6.1%	6.5%	7.6%	9.8%
Nature travel/ecotouring	7.0%	9.1%	9.1%	12.0%	9.2%
Gardens	8.3%	12.6%	9.5%	9.1%	8.9%
Other nature (photography, rockhound, etc.)	n/a	n/a	n/a	n/a	7.8%
Craft Breweries*	n/a	n/a	n/a	3.4%	7.1%
Special events/Festivals	5.1%	6.8%	4.2%	4.5%	5.2%
Skiing/snowboarding	0.4%	2.9%	0.5%	2.3%	5.0%
Rock/mountain climbing	1.8%	4.8%	2.0%	2.7%	4.4%
Zoos/Aquariums Aviaries	2.0%	2.1%	2.5%	1.0%	4.3%
Native American ruins/Rock art*	n/a	n/a	n/a	n/a	4.2%
Nightclub/dancing	0.8%	6.2%	1.8%	5.3%	4.1%
Bird Watching	3.3%	4.5%	3.4%	4.4%	4.1%
Whitewater rafting/kayaking/canoeing/paddleboarding	3.5%	2.8%	4.3%	3.3%	2.8%
Spa/health club	3.0%	1.2%	1.9%	3.5%	2.8%
Biking/Road biking/cycling	2.1%	1.7%	3.0%	2.3%	2.8%
Farms/ranches/agri-tours*	n/a	n/a	n/a	n/a	2.7%
ATV/Four-wheeling*	n/a	n/a	n/a	n/a	2.6%
Golf	1.2%	2.7%	2.7%	2.5%	2.4%
Distilleries*	n/a	n/a	n/a	n/a	2.3%
Snow sports other than skiing/snowboarding	0.2%	n/a	0.5%	0.2%	2.3%

\*new category

## **2014 Demographic Profile of North Carolina Overnight Visitors to the Mountain Region**

More than half of North Carolina Mountain Region overnight visitors (59%) are married, while twenty-one 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 (91%), and just one percent classify themselves as black/African American. A larger proportion indicate they are Asian/Pacific Islander (2.5%).

The average Mountain Region visitor is 47 years old, and nearly two-thirds (65%) of Mountain Region overnight visitor parties have a household head with a college degree or higher.

The average household income of a visitor party to the Mountain Region in 2014 was \$73,310. Nearly forty percent (39.7%) of the visitor parties that traveled to North Carolina's Mountain Region in 2014 had a household income \$75,000 or over. Eleven percent had a household income of over \$125,000.

The average North Carolina Mountain Region overnight visitor has 11.7 vacation days each year. Nearly sixty percent (59.7%) of overnight visitor parties reported that the head of household is employed, while twenty-one percent are retired. The remainder reported "not employed" as work status.

The average household size of a North Carolina Mountain Region overnight visitor party in 2014 was 2.4.



## 2014 Top Advertising Markets

In 2014, the top advertising markets sending overnight visitors to **North Carolina's Mountain Region** were Atlanta (16.5%), Charlotte (13.3%), Greenville-Spartanburg-Asheville-Anderson (7.4%), Greensboro-High Point-Winston Salem (7.3%) and Raleigh/Durham (6.4%). As compared to 2013, there was great growth for the Mountain Region from the Atlanta and Charlotte markets. Advertising markets correspond with Nielsen's Designated Market Areas (DMAs).

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

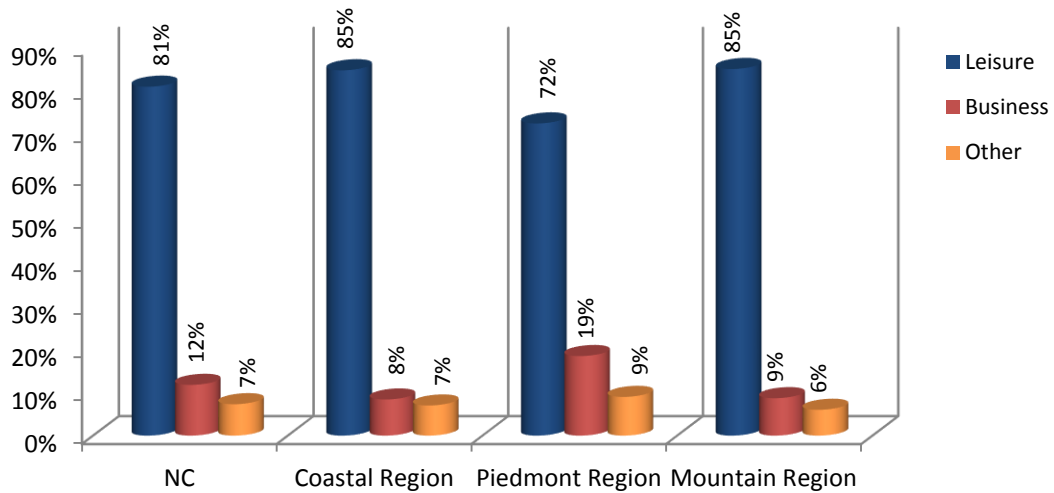
<i>DMA of Origin</i>	<i>2014 % of Total NC Visitors to Region</i>	<i>2013 % of Total NC Visitors to Region</i>	<i>2012 % of Total NC Visitors to Region</i>	<i>2011 % of Total NC Visitors to Region</i>	<i>2014 Mountain Share of Visitors from DMA</i>	<i>2013 Mountain Share of Visitors from DMA</i>	<i>2012 Mountain Share of Visitors from DMA</i>	<i>2011 Mountain Share of Visitors from DMA</i>
Atlanta	16.5%	8.4%	9.1%	8.5%	46.2%	27.7%	33.3%	24.6%
Charlotte	13.3%	10.8%	14.8%	9.7%	24.1%	21.0%	26.8%	18.7%
Greenville-Spartanburg-Asheville-Anderson	7.4%	9.3%	10.3%	4.8%	33.8%	36.2%	37.1%	22.8%
Greensboro-High Point-Winston Salem	7.3%	8.0%	7.1%	8.3%	16.4%	22.2%	18.6%	21.2%
Raleigh-Durham (Fayetteville)	6.4%	10.4%	6.5%	10.8%	8.9%	14.0%	10.5%	14.4%
Columbia, SC	3.7%	0.7%	0.6%	2.0%	28.9%	6.4%	5.6%	22.7%
Chattanooga	3.0%	2.4%	1.2%	1.5%	73.3%	60.0%	40.0%	41.7%
West Palm Beach-Ft. Pierce	3.0%	0.7%	1.8%	1.0%	55.0%	15.0%	33.3%	33.3%
Knoxville	2.3%	1.9%	2.2%	4.7%	33.3%	55.4%	32.0%	33.3%
Myrtle Beach-Florence	2.2%	0.8%	0.4%	0.5%	26.7%	16.7%	3.8%	4.5%
New York	1.9%	3.2%	4.1%	1.2%	10.0%	13.3%	18.4%	6.5%
Birmingham	1.9%	0.4%	0.5%	1.4%	58.3%	25.0%	22.2%	37.5%
Nashville	1.7%	1.5%	2.2%	2.5%	40.0%	37.5%	61.5%	46.7%
Washington, DC	1.6%	1.5%	0.0%	1.3%	9.8%	6.6%	0.0%	7.0%
Tampa-St. Petersburg (Sarasota)	1.2%	2.0%	2.5%	4.2%	12.9%	20.6%	21.3%	29.5%
Greenville-New Bern-Washington	1.2%	1.3%	1.0%	1.0%	8.3%	6.5%	5.6%	8.1%
Augusta	1.1%	0.8%	0.0%	0.0%	33.3%	17.6%	0.0%	0.0%
Dallas-Ft. Worth	1.1%	1.1%	0.4%	1.2%	26.7%	20.0%	5.9%	60.0%
Wilmington	1.1%	1.1%	0.6%	0.7%	10.5%	8.0%	8.7%	7.3%

## 2014 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 and Mountain regions had larger shares of visitors travel to the regions for leisure reasons than the Piedmont Region. The Piedmont Region, while still primarily visited for leisure purposes, has the largest share of business travelers (19%).

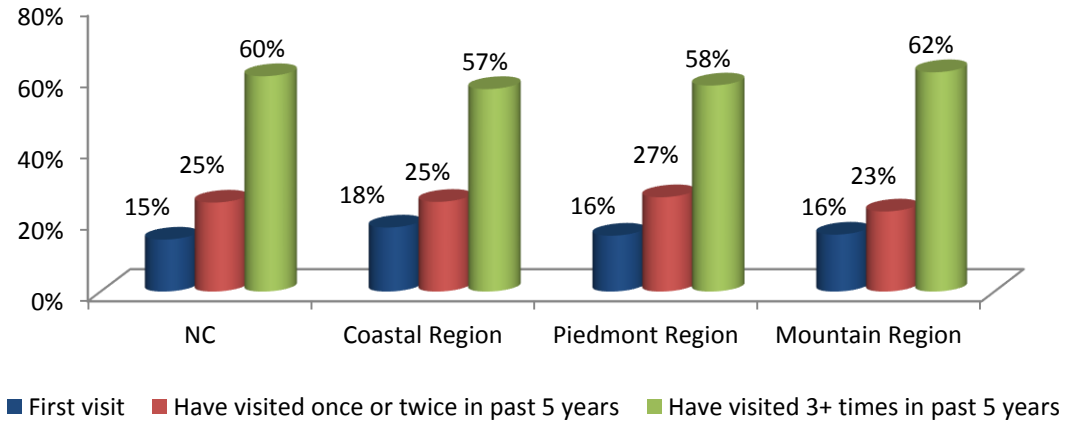
### 2014 Primary Purpose of Trip by Region



### First Time vs. Repeat Visitors

The majority of each region’s out-of-state 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 2014.

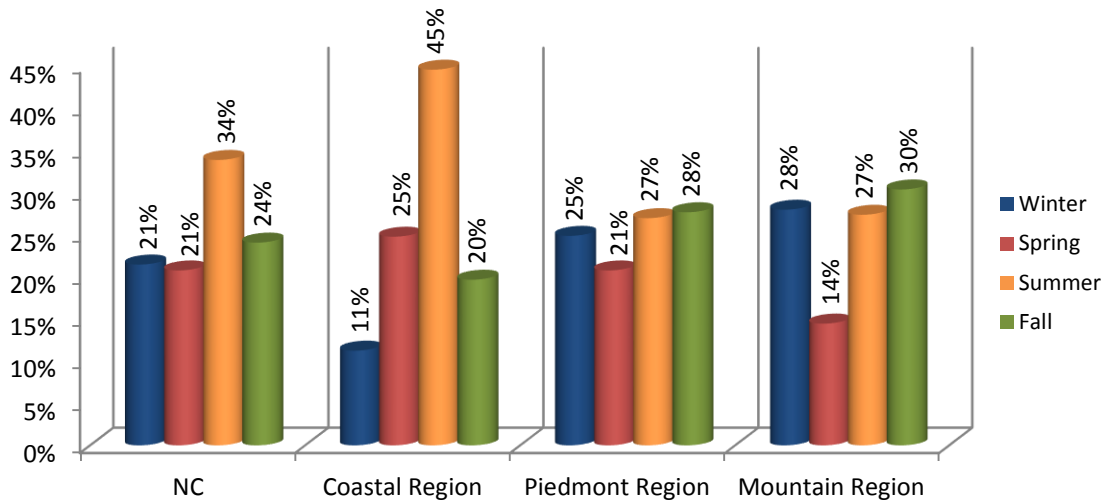
**2014 First Time vs. Repeat Out-of-State Visitors by Region**



### 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.

**2014 Season of Travel by Region**



### Average Length of Stay for Overnight Visitors

North Carolina All Overnight	Coastal Region All Overnight	Piedmont Region All Overnight	Mountain Region All Overnight
2.8 nights	2.9 nights	3.1 nights	2.5 nights
North Carolina Out-of-State	Coastal Region Out-of-State	Piedmont Region Out-of-State	Mountain Region Out-of-State
3.1 nights	3.0 nights	3.4 nights	2.8 nights
North Carolina Resident	Coastal Region Resident	Piedmont Region Resident	Mountain Region Resident
2.4 nights	2.8 nights	2.4 nights	1.9 nights

### Travel Party Size for Overnight Visitors

North Carolina	Coastal Region	Piedmont Region	Mountain Region
1.9 people	2.0 people	1.8 people	2.0 people
North Carolina Out-of-State	Coastal Region Out-of-State	Piedmont Region Out-of-State	Mountain Region Out-of-State
1.9 people	1.9 people	1.8 people	2.1 people
North Carolina Resident	Coastal Region Resident	Piedmont Region Resident	Mountain Region Resident
1.8 people	2.0 people	1.7 people	1.9 people

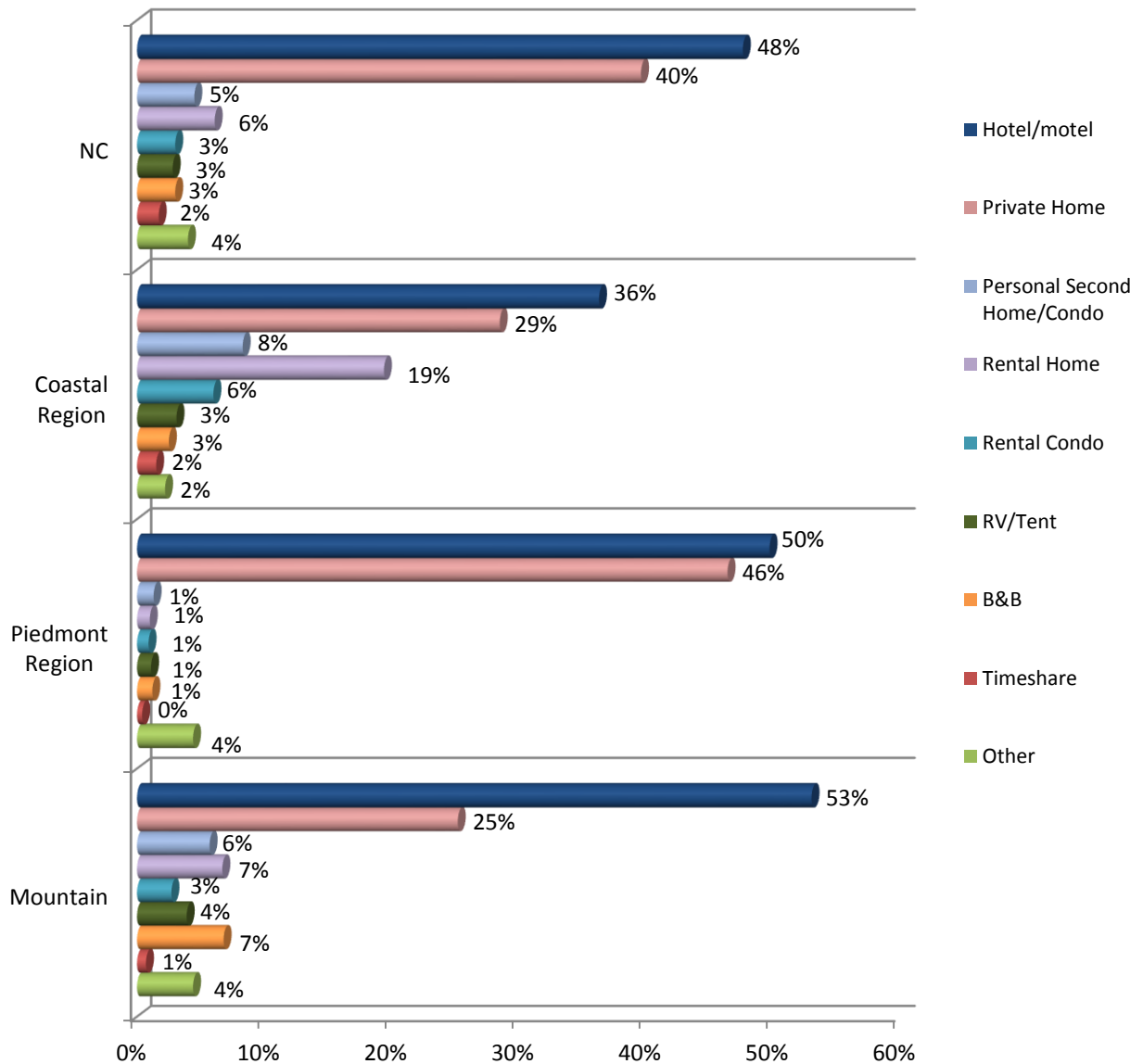
### Children on Trip for Overnight Visitors

North Carolina	Coastal Region	Piedmont Region	Mountain Region
22.5%	27.5%	17.2%	25.5%
North Carolina Out-of-State	Coastal Region Out-of-State	Piedmont Region Out-of-State	Mountain Region Out-of-State
23.7%	28.4%	17.6%	29.8%
North Carolina Resident	Coastal Region Resident	Piedmont Region Resident	Mountain Region Resident
20.5%	26.6%	16.4%	16.3%

## 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 use hotels/motels the most (53%), and while more than one-third of Coastal Region visitors also stay in hotels/motels, nearly as many stay in private and rental homes.

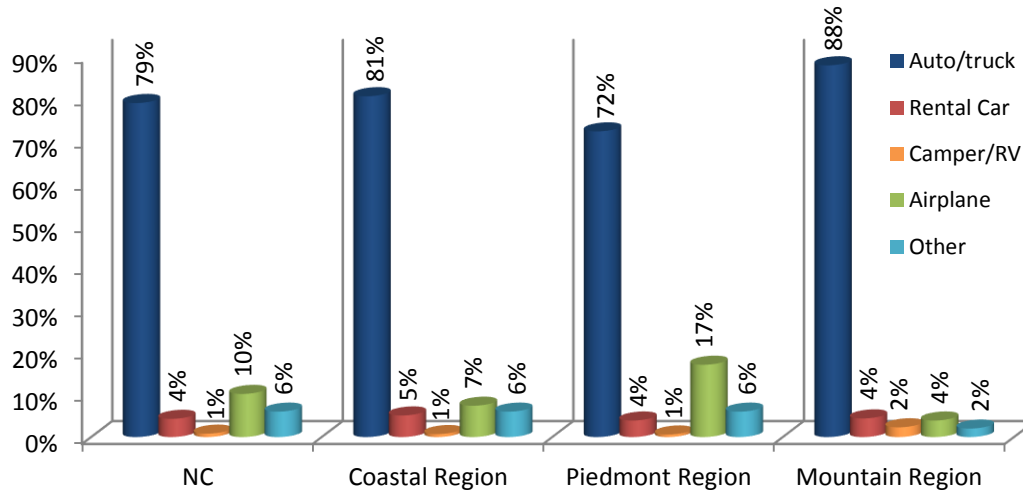
**2014 Lodging by Overnight Visitors by Region**



## 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%).

**2014 Primary Transportation by Overnight Visitors  
by Region**



## Origin of Overnight Visitors

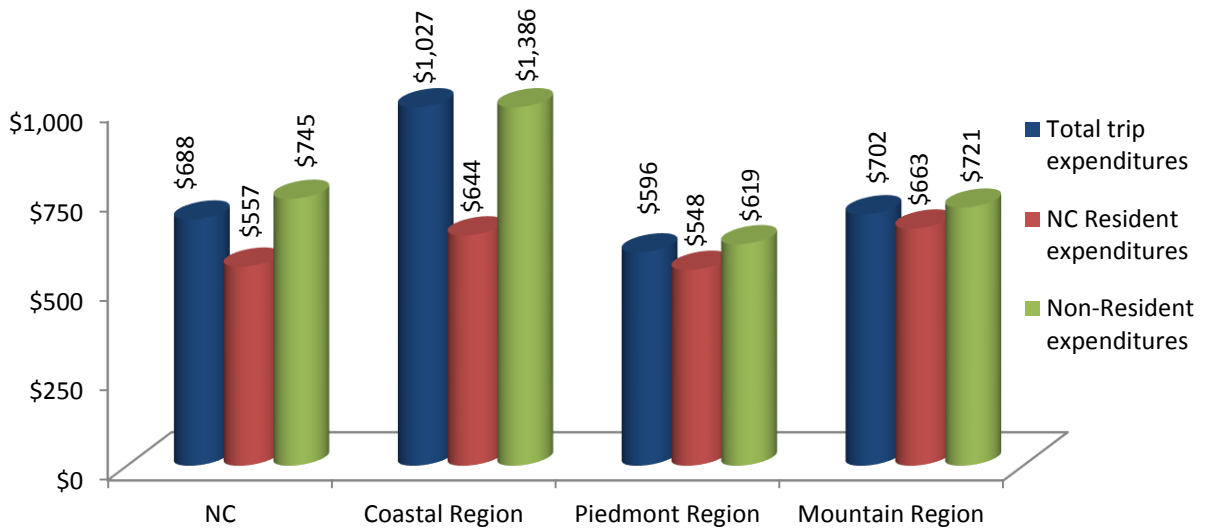
North Carolina is the top state of origin for all three regions of the state. In-state residents comprise around one-third of the state’s overnight visitors, and visitors to the Piedmont and Mountain regions. Resident visitors totaled nearly half of the overnight visitors to the Coastal Region in 2014. The other top states are similar, though there are some differences in rank between regions.

NC	Coastal Region	Piedmont Region	Mountain Region
North Carolina (30.0%)	North Carolina (49.2%)	North Carolina (31.5%)	North Carolina (30.9%)
South Carolina (9.2%)	Virginia (11.1%)	South Carolina (11.9%)	Georgia (18.5%)
Florida (8.1%)	Pennsylvania (6.0%)	Virginia (8.6%)	South Carolina (12.6%)
Virginia (7.9%)	Maryland (5.3%)	Georgia (8.1%)	Florida (9.3%)
Georgia (7.3%)	Florida (3.4%)	New York (7.1%)	Tennessee (7.5%)
New York (4.3%)	New York (3.2%)	Florida (6.4%)	Virginia (3.6%)
Tennessee (3.1%)	New Jersey (2.8%)	New Jersey (2.4%)	New York (3.2%)
Pennsylvania (3.0%)	Ohio (2.7%)	Texas (2.3%)	Texas (2.2%)
Maryland (2.4%)	South Carolina (2.4%)	Ohio (2.2%)	Alabama (1.7%)
Ohio (2.4%)	Georgia (2.1%)	Pennsylvania (1.9%)	Pennsylvania (1.6%)

### Trip Expenditures

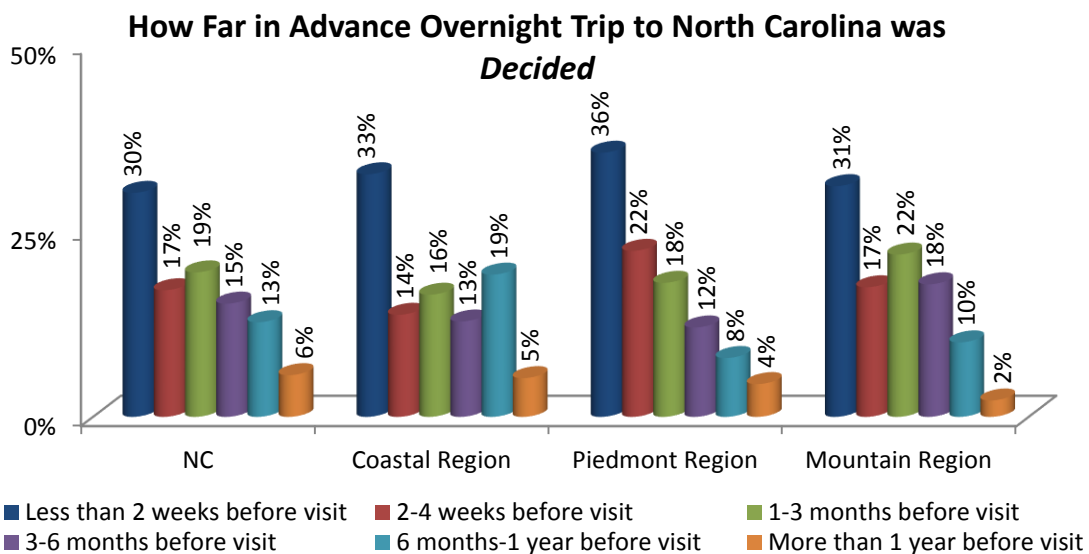
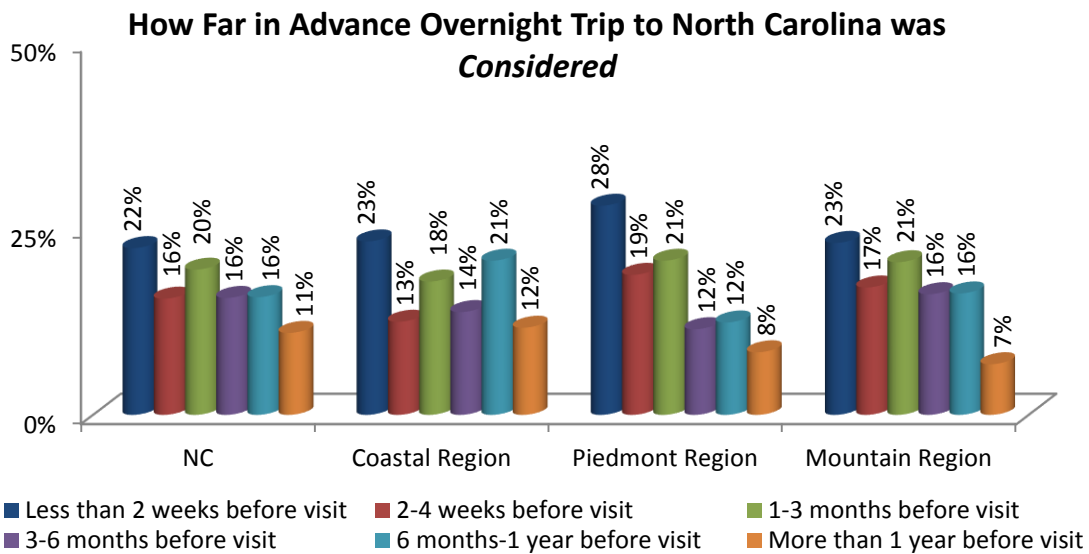
Coastal Region visitor parties, on average, spend more than other regional visitors or NC in general. Visitor parties to this region tend to have a slightly longer length of stay and have a slightly larger travel party size, explaining some of the higher spending. The higher spending can also be attributed to the type of lodging used by Coastal Region visitor and the cost of lodging in the region.

**2014 Average Total Trip Spending by Overnight Visitor Parties by Region**



### 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 one-third of visitors who eventually traveled overnight to the Coastal Region began considering the trip more than six months prior to the visit, and twenty-four percent made the decision to visit more than six months in advance. Piedmont Region visitors have the shortest window of travel planning. Nearly half (47%) consider a trip less than one month prior to the visit, and more than half (58%) make the decision to visit less than one month before the visit.





## Activities

Activities participated in by North Carolina overnight travelers in 2014 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 (35%)	Beach (62.3%)	Visiting relatives (39.5%)	Visiting relatives (30.3%)
Shopping (21%)	Shopping (26.6%)	Shopping (19.8%)	Shopping (26.0%)
Beach (18%)	Visiting Relatives (26.1%)	Visiting friends (18.9%)	Rural sightseeing (25.7%)
Visiting Friends (17%)	State/National Park (16.7%)	Fine dining (10.6%)	State/National Park (23.0%)
Rural Sightseeing (13%)	Fine Dining (16.5%)	Historic sites/churches (8.3%)	Fine dining (17.8%)
Fine Dining (12%)	Rural Sightseeing (15.9%)	Museums (7.5%)	Historic sites/churches (15.8%)
State/National Park (11%)	Visiting Friends (14.6%)	Urban sightseeing (7.3%)	Old homes/mansions (15.2%)
Historic Sites/Churches (9%)	Historic Sites/Churches (12.7%)	Rural sightseeing (6.9%)	Casino/gaming (14.4%)
Wildlife Viewing (7%)	Wildlife Viewing (12.2%)	Nightclub/dancing (5.9%)	Museums (14.2%)
Museums (7%)	Museums (9.3%)	State/National Park (5.8%)	Wildlife viewing (14.1%)
Urban Sightseeing (7%)	Fishing (8.8%)	Old homes/mansions (5.1%)	Visiting friends (13.3%)
Old Homes/Mansions (6%)	Zoos/Aquariums/Aviaries (8.2%)	Youth/amateur/collegiate sporting events (4.1%)	Urban sightseeing (11.9%)
Hiking/Backpacking (4%)	Urban Sightseeing (8.1%)	Theme park/Amusement park/Water park (3.9%)	Art galleries (10.7%)
Art Galleries (4%)	Bird Watching (5.5%)	Special events/Festivals (3.8%)	Hiking/Backpacking (10.3%)
Nightclubs/Dancing (4%)	Old Homes/Mansions (5.2%)	Art galleries (3.5%)	Local/folk arts/crafts (10.3%)
Zoos/Aquariums/Aviaries (4%)	Nature Travel/Eco-touring (4.4%)	Wildlife viewing (3.2%)	Wine tasting/winery tour (9.8%)
Local/folk arts/crafts (3%)	Biking/Road Biking/Cycling (3.8%)	Wine tasting/winery tour (3.2%)	Nature travel/ecotouring (9.2%)
Wine Tasting/Winery Tour (3%)	Local/folk arts/crafts (3.6%)	Craft Breweries (3.0%)	Gardens (8.9%)
Fishing (3%)	Art Galleries (3.0%)	Zoos/Aquariums Aviaries (2.5%)	Other nature (photography, rockhound, etc.) (7.8%)
Nature Travel/Eco-touring (3%)	Golf 2.9(%)	Hiking/Backpacking (2.3%)	Craft Breweries (7.1%)
Special Events/Festivals (3%)	Hiking/Backpacking (2.9%)	Golf (2.2%)	Special events/Festivals (5.2%)
Casino/Gaming (3%)	Nightclubs/Dancing (2.9%)	Motor sports (2.0%)	Skiing/snowboarding (5.0%)
Gardens (3%)	Wine Tasting/Winery Tour (2.6%)	Theater/drama (1.8%)	Rock/mountain climbing (4.4%)
Craft Breweries (3%)	Theme Park/Amusement Park/Water Park (2.6%)	Gardens (1.7%)	Zoos/Aquariums Aviaries (4.3%)
Bird Watching (3%)	Musical performance/show (2.5%)	Musical Theater (1.7%)	Native American ruins/Rock art (4.2%)
Golf (3%)	Whitewater Rafting/ Kayaking/Canoeing (2.5%)	Local/folk arts/crafts (1.5%)	Nightclub/dancing (4.1%)
Theme Park/Amusement Park/Water Park (3%)	Scuba diving/snorkeling (2.4%)	Spa/health club (1.5%)	Bird Watching (4.1%)
Other nature (photography, rockhound, etc.) (2.2%)	Gardens (2.3%)	Bird Watching (1.4%)	Whitewater Rafting/ Kayaking/Canoeing (2.8%)
Whitewater Rafting/ Kayaking/Canoeing (1.9%)	Special Events/Festivals (2.2%)	Fishing (1.3%)	Spa/health club (2.8%)
Biking/Road biking/Cycling (1.7%)	Motor boat/Jet ski (2.2%)	Musical performance/show (1.2%)	Biking/Road biking/Cycling (2.8%)

## 2014 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>	47.2 years of age	45.9 years of age	45.8 years of age	46.7 years of age
<b>Education of Household Head</b>				
High school or less	13.6%	16.9%	13.2%	14.2%
Some college - no degree	24.2%	26.9%	23.0%	20.9%
Completed college	43.1%	42.3%	43.0%	44.4%
Post Graduate College	19.2%	13.9%	20.9%	20.5%
<b>Employment of Household Head</b>				
Employed	62.2%	67.7%	63.3%	59.7%
Retired	20.5%	20.2%	15.7%	21.2%
Not employed	17.3%	12.1%	21.1%	19.1%
<b>Annual Household Income</b>				
Less than \$25,000	15.0%	14.1%	16.8%	12.6%
\$25,000-\$49,999	22.3%	21.6%	23.9%	21.0%
\$50,000-\$74,999	22.7%	21.5%	20.4%	26.8%
\$75,000 & over	40.0%	42.7%	38.8%	39.7%
<b>Marital Status</b>				
Married	55.1%	56.6%	51.9%	58.7%
Never married	22.3%	21.1%	24.1%	20.3%
Divorced, widowed, separated	22.6%	22.3%	24.1%	21.0%
<b>Ethnicity</b>				
White	87.0%	88.1%	83.6%	91.1%
Black/African American	6.7%	4.9%	10.5%	0.8%
Asian or Pacific Islander	1.4%	1.6%	1.0%	2.5%
Other	4.9%	5.4%	4.9%	5.6%
<b>Average Household Size</b>	2.4 persons	2.5 persons	2.4 persons	2.4 persons

## 2014 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, Atlanta 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, in-state markets and mid-Atlantic markets are very important to the Coastal Region.

NC	Coastal Region
Raleigh-Durham-Fayetteville (12.5%)	Raleigh-Durham-Fayetteville (20.3%)
Charlotte (9.7%)	Charlotte (9.8%)
Greensboro-High Point-Winston Salem (7.7%)	Greensboro-High Point-Winston Salem (9.0%)
Atlanta, GA (6.3%)	Greenville-New Bern-Washington (5.4%)
Greenville-Spartanburg-Asheville (3.9%)	Norfolk-Portsmouth-Newport News (4.9%)
New York (3.4%)	Baltimore (4.4%)
Washington DC Metro (2.9%)	New York, NY (4.0%)
Norfolk-Portsmouth-Newport News (2.5%)	Washington DC Metro (3.3%)
Roanoke-Lynchburg (2.4%)	Richmond-Petersburg (3.1%)
Greenville-New Bern-Washington (2.3%)	Pittsburgh (2.9%)
Piedmont Region	Mountain Region
Raleigh-Durham-Fayetteville (10.2%)	Atlanta, GA (16.5%)
Charlotte (8.9%)	Charlotte (13.3%)
Greensboro-High Point-Winston Salem (8.3%)	Greenville-Spartanburg-Asheville (7.4%)
Atlanta, GA (6.2%)	Greensboro-High Point-Winston Salem (7.3%)
New York (4.5%)	Raleigh-Durham (Fayetteville) (6.4%)
Greenville-Spartanburg-Asheville (3.9%)	Columbia (3.7%)
Roanoke-Lynchburg (3.4%)	Chattanooga (3.0%)
Columbia (3.0%)	West Palm Beach-Ft. Pierce (3.0%)
Wilmington (2.6%)	Knoxville, TN (2.3%)
Norfolk-Portsmouth-Newport News (2.3%)	Myrtle Beach-Florence (2.2%)

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

## 2014 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.