

2016 North Carolina Regional Travel Summary

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



2016 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. At the end of the report, an appendix offers definitions of key travel terms.

2016 North Carolina Regional Travel Summary

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2016 Domestic Coastal Region Travel Summary

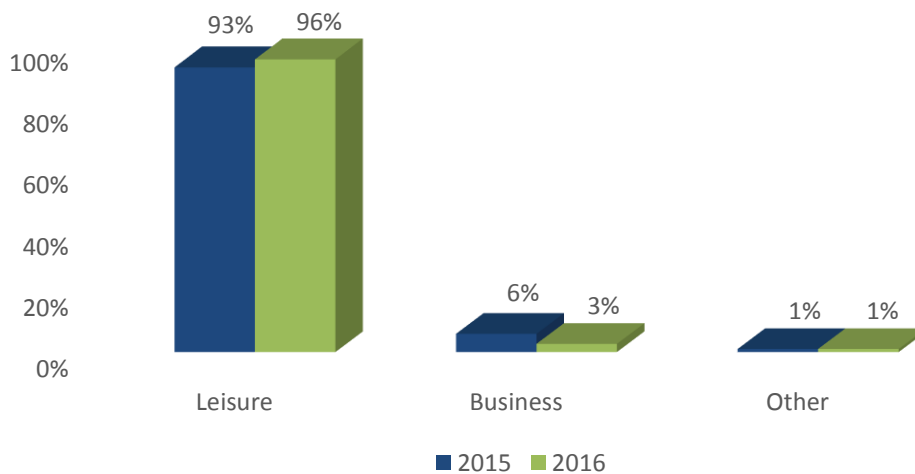
- ◆ In 2016, 22 percent of North Carolina visitors traveled to North Carolina’s Coastal Region, approximately 10.7 million person-trips (approximately 9.4 million overnight person-trips). For marketing purposes, the Coastal Region is made up of twenty-eight most eastern counties of North Carolina. *Note that the regional volume totals do not sum to the statewide volume total, as some visitors travel to multiple geographic regions in one visit.
- ◆ Ninety-four percent of all domestic visitors (and 96 percent of overnights) came to the Coastal Region for pleasure purposes, while five percent of visitors (3 percent of overnights, down from 6 percent in 2015) came to conduct business (includes meeting/convention).
- ◆ Summer (June - August) was the most popular season for travel to North Carolina’s Coastal Region, with forty-eight percent of all 2016 coastal visitors and forty-nine percent of overnights. Spring (March-May) and fall (September - November) followed with twenty-two percent and eighteen percent of coastal visitors (24 percent and 20 percent of overnights, respectively). The winter season (December-February) was the least visited with eleven percent (8 percent of overnights).
- ◆ Overnight visitors to the Coastal Region spent an average of 4.9 nights in the region in 2016.
- ◆ Twenty-five percent of Coastal Region visitors lodged at a hotel/motel while thirty-four percent stayed in a private home. Twenty-five percent stayed in a rental home and four percent stayed in a rental condo. Eight percent stayed in a personal second home or condo. Approximately five percent of coastal overnights indicated that they lodged in a shared-economy property such as AirBnB or VRBO.
- ◆ The average travel party size for all Coastal Region visitors was 2.5 people. Forty-one percent of overnight travel parties to the region included children in the party in 2016 (39 percent of all travel parties).
- ◆ Ninety-five percent of overnight travelers to the Coastal Region drove (includes personal automobile, rental, motorcycle and RV), while three percent traveled by air.
- ◆ In 2016, the average household trip expenditure in the Coastal Region was \$1,004. The average household trip expenditure for overnight visitors to the Coastal Region was \$1,152. Daytrip parties to the Coastal Region spent approximately \$101 per visit.
- ◆ The top states of origin of *overnight* visitors to the Coastal Region were North Carolina (43%), Virginia (15%), South Carolina (6%), Maryland (5%), Tennessee (4%), New York (4%), Pennsylvania (4%), Florida (4%) and Ohio (2%).
- ◆ Fifty-four percent of all households (54 percent of overnight as well) that traveled to North Carolina’s Coastal Region in 2016 had a household income over \$75,000.
- ◆ In 2016, Raleigh/Durham (15%) was the top advertising market of origin for *overnight* travelers to the Coastal Region, followed by Greenville-New Bern-Washington (9%), Norfolk-Portsmouth-Newport News (8%), Greensboro/High Point/Winston Salem (8%), Richmond-Petersburg, VA (7%), Washington DC (6%) and Charlotte (5%).

Coastal Region Overnight Visitor Profile

Main Purpose of Visit

In 2016, ninety-six percent of domestic overnight visitors came to the Coastal Region for leisure purposes, which included visiting friends and relatives, outdoor recreation and entertainment/sightseeing. This was up from ninety-three percent in 2015. Approximately three percent of domestic overnight visitors came for general business, convention, seminar or other group meeting, while one percent traveled to the Coastal Region for other purposes.

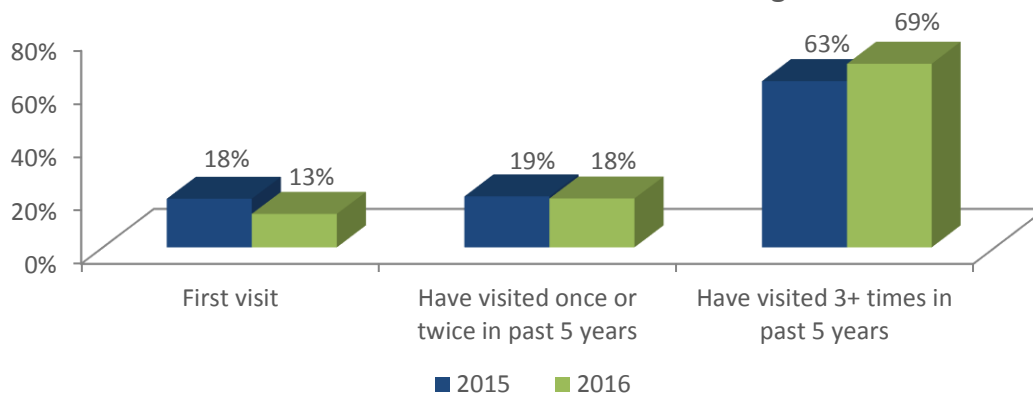
2016 Primary Purpose of Overnight Trip to North Carolina's Coastal Region



First Time Visitors

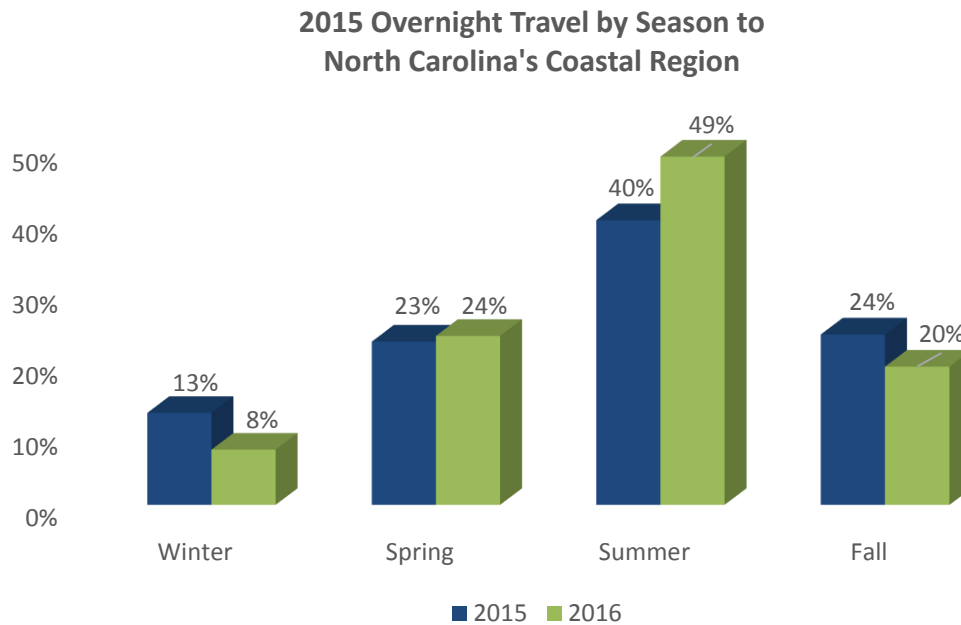
Thirteen percent of overnight visitors to the Coastal Region were first time visitors in 2016. The majority of overnight coastal visitors are still repeat, and frequent, visitors.

2016 First Time vs. Repeat Visitors to North Carolina's Coastal Region



Travel Volume by Season

When examining visitation based on the typical seasonal schedule, the summer (June through August), with 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, increasing from forty percent of all overnight visitors in 2015 to forty-nine percent of overnights in 2016. In 2016, the proportion of fall (September through November) visitors dropped from 2015 in terms of proportion of total to twenty percent. Spring (March through May) drew twenty-four percent of overnight visitors and winter (December through February) welcomed eight percent of the region’s annual overnight visitors.



Average Length of Stay

In 2016, an average of 4.9 nights was spent by visitors to North Carolina’s Coastal Region, up from 4.2 nights in 2015. Data indicates that out-of-state visitors stay an average of 5.7 nights (up from 4.7 in 2015), while in-state visitors stay an average of 3.8 nights (up from 3.6 in 2015).

Travel Party Size

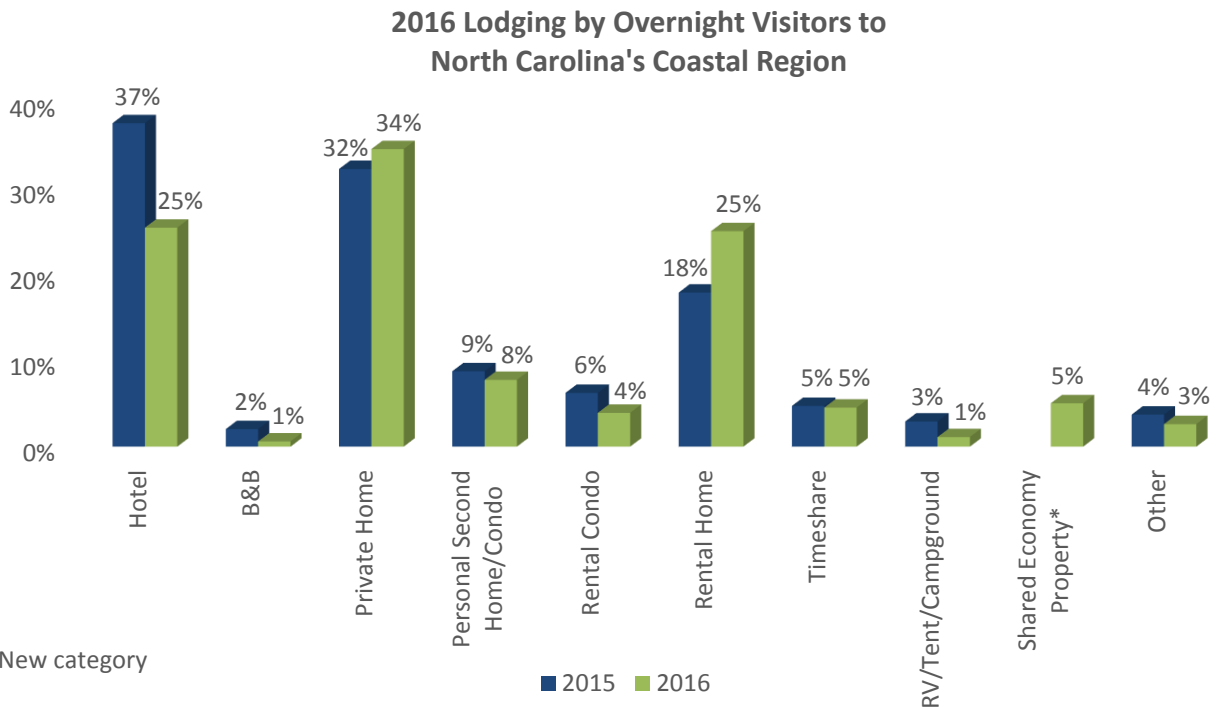
The average travel party size for all Coastal Region overnight visitors was 2.5 people.

Children on Trip

Forty-one percent of overnight visitor parties to the Coastal Region included children, up from thirty-seven percent in 2015. Among those who traveled with children, the average number of children on trips was 2.1.

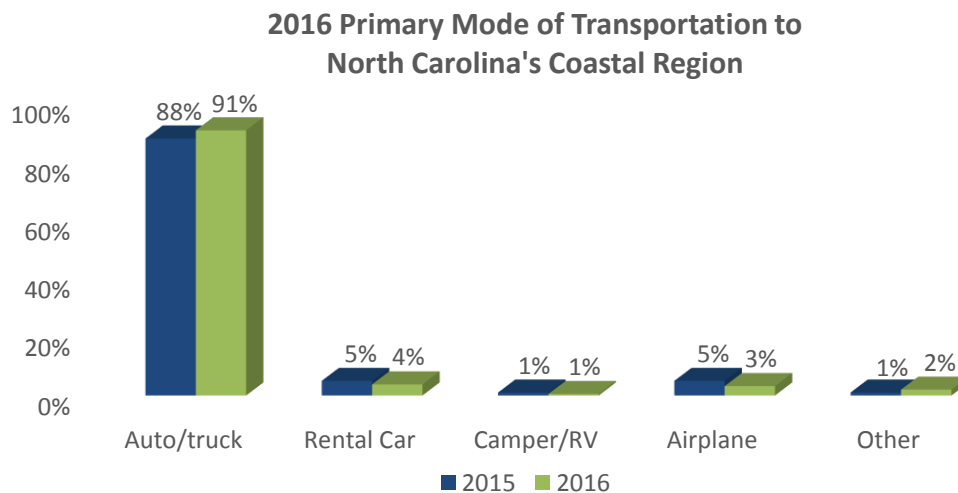
Lodging Used in Coastal Region

In 2016, one-quarter of Coastal Region visitors lodged at a hotel/motel, down from thirty-seven percent in 2015. Thirty-four percent of the region’s visitors stayed in a private home, and twenty-five percent stayed in a rental home. A new category was added to the survey in 2016, and the results reflected that approximately five percent of Coastal Region visitors chose to use some type of shared economy lodging, such as AirBnB or VRBO. It should be noted that some visitors use more than one type of accommodation during a visit, so totals equal more than 100%.



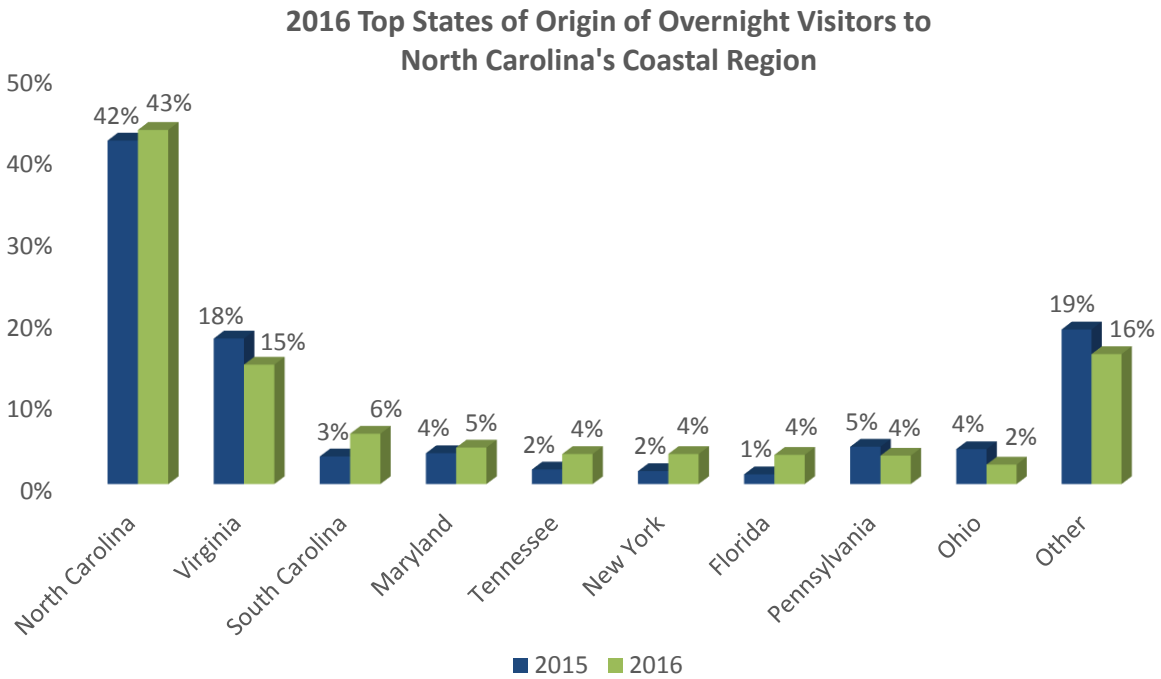
Mode of Transportation

In 2016, the personal auto was by far the dominant form of transportation (91%) for overnight visitors to the Coastal Region, while three percent traveled by air.



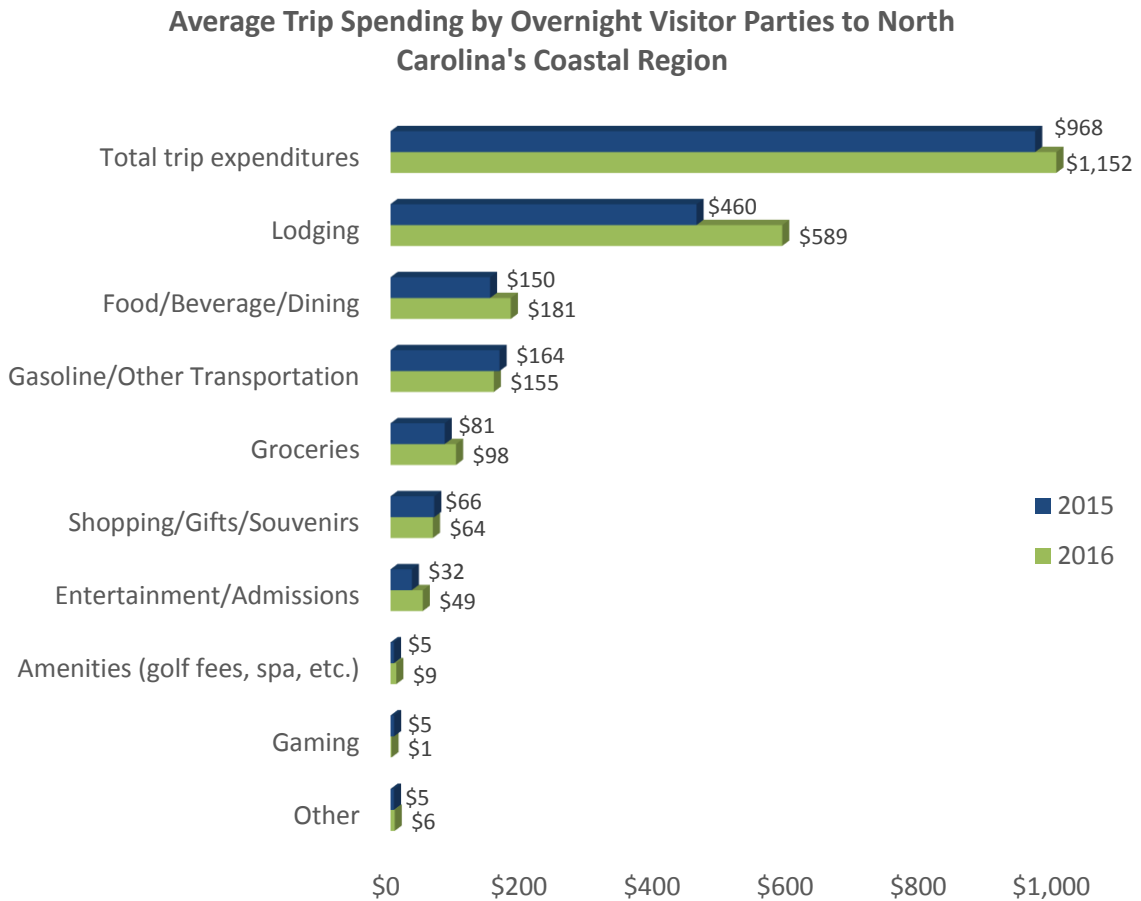
Origin of Visitors

In 2016, the top states of origin for Coastal Region overnight visitors included North Carolina (43%), Virginia (15%), South Carolina (6%), Maryland (5%), Tennessee (4%), New York (4%) and Pennsylvania (4%). The proportion of in-state visitors increased slightly from 2015, as did the proportion of visitors from South Carolina, Maryland, Tennessee, New York and Florida, while the proportion of visitors from Virginia and Ohio to the coast decreased slightly from 2015 to 2016.



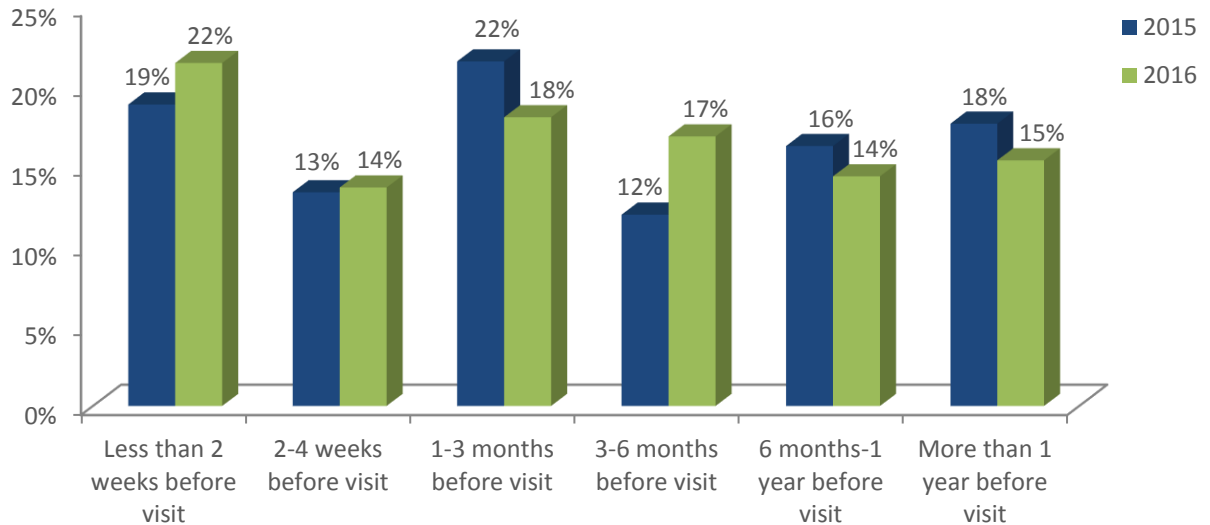
Amount Spent in Coastal Region

The average overnight visitor party spending per trip in the Coastal Region increased nineteen percent from 2015 to 2016. The bulk of the increase was in lodging expenses, though expenses in food/beverage/dining, groceries and entertainment also increased. The lodging expense increase can be partially explained by a longer length of stay, though lodging rates also increased from 2015 to 2016.



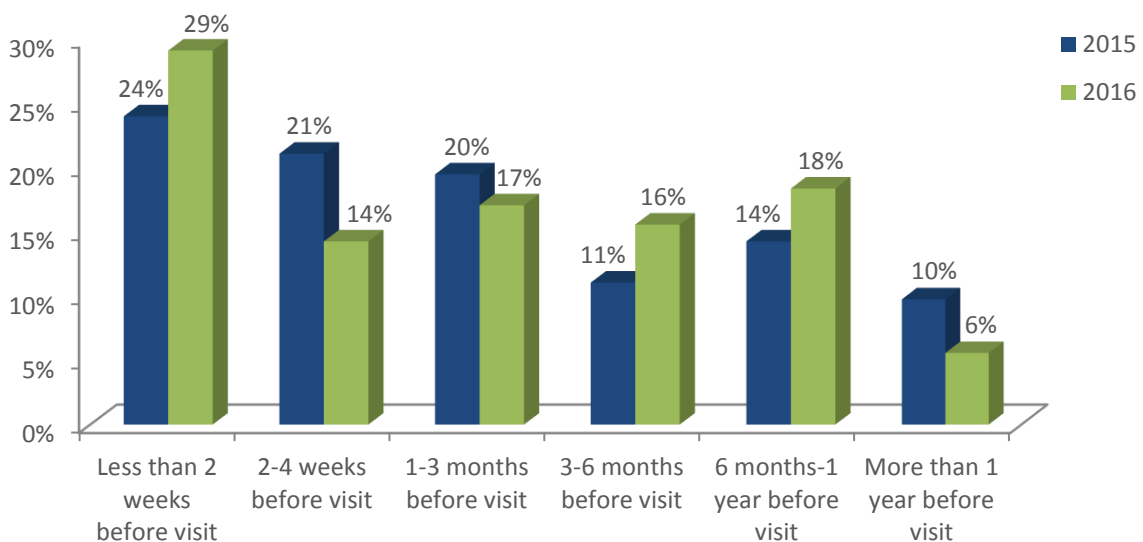
Travel Planning to Coastal Region

2016 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 nearly a quarter of them decided to visit at least six months ahead of travel. The proportion of the region’s overnight visitors who decided on the travel destination one month or less prior to travel was flat from 2015 to 2016, though slightly more decided on the destination less than two weeks prior to travel in 2016.

2016 Length of Time to Decide On NC as Travel Destination



Activities

The following table provides information on activities participated in by coastal visitors in 2016. These are not indicative of purpose of trip, but what activities visitors participate in while in North Carolina. Nearly two-thirds of the overnight visitors to the region went to a beach and more than one-third shopped while visiting the coast. Other popular activities included visiting relatives (26%), fine dining (24%), visiting historic sites/churches (20%), visiting friends (17%), fishing (16%), rural sightseeing (14%) and visiting a state park/monument/recreation area (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	2016	2015
Beach	62.5%	64.5%
Shopping	37.3%	33.7%
Visiting Relatives	26.4%	21.9%
Fine Dining	24.2%	19.7%
Historic Sites/Churches	20.3%	17.1%
Visiting Friends	16.8%	13.8%
Fishing (fresh or saltwater)	16.2%	13.2%
Rural Sightseeing	13.5%	10.7%
State Park/Monument/Recreation area	13.4%	12.2%
Museums	11.3%	12.4%
National Park/Monument/Recreation area	9.9%	7.0%
Urban Sightseeing	9.8%	7.3%
Wildlife Viewing	8.0%	10.3%
Craft Breweries	6.5%	4.3%
Zoos/Aquariums/Aviaries	6.3%	9.2%
Other nature (photography, rockhounding, etc.)	5.9%	6.2%
Biking/Road Biking/Cycling	5.6%	3.8%
Old Homes/Mansions	5.5%	4.6%
Golf	5.5%	2.1%
Theme Park/Amusement Park/Water Park	4.9%	3.2%
Gardens	4.8%	3.8%
Art Galleries	4.8%	3.5%
Nightclubs/Dancing	4.8%	5.1%
Musical performance/show	4.6%	2.1%
Hiking/Backpacking	4.4%	2.8%
Theater/drama	4.2%	1.2%
Wine Tasting/Winery Tour	3.7%	3.9%
Bird Watching	3.5%	4.3%
Motor boat/jet ski	3.3%	1.3%
Local/folk arts/crafts	2.4%	1.8%
Youth/Amateur/Collegiate/Sporting Event <u>Spectator</u>	2.1%	1.6%
Nature Travel/Eco-touring	2.1%	1.5%
Whitewater Rafting/Kayaking/Canoeing	1.8%	1.7%
Area where TV show or movie was filmed	1.6%	2.7%
Sailing	1.4%	2.4%
Water skiing	1.1%	1.8%
Musical theater	1.1%	1.2%
Hang gliding/skydiving/base jumping	1.0%	0.1%

Demographic Profile of North Carolina Coastal Region Overnight Visitors

Two-thirds (65.8%) of North Carolina Coastal Region overnight visitors are married and twenty-one percent of the region's visitors have never been married. Thirteen percent are divorced, widowed or separated.

The largest proportion of North Carolina Coastal Region overnight visitors classifies themselves as white (94%), and four percent classify themselves as black/African American. One percent listed their ethnicity as Asian/Pacific Islander.

The average Coastal Region overnight visitor is 47 years old and nearly two-thirds (59%) 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 2016 was \$86,060 with more than half (54%) of the visitor parties reporting a household income \$75,000 or more. Twenty-one percent had a household income of over \$125,000.

Sixty-three percent of overnight visitor parties reported that the head of household is employed, while twenty percent are retired (up from 14 percent in 2015). The remainder reported "not employed" as work status.

The average household size of a North Carolina Coastal Region overnight visitor party in 2016 was 2.8.

2016 Top Advertising Markets

In 2016, the top advertising markets sending overnight visitors to **North Carolina's Coastal Region** were Raleigh-Durham-Fayetteville (14.6%), Greenville-New Bern-Washington (8.9%), Norfolk-Portsmouth-Newport News, VA (8.0%), Greensboro-High Point-Winston-Salem (7.8%), Richmond-Petersburg, VA (6.6%), Washington DC (5.5%) and Charlotte (4.6%). The share of visitors from Charlotte decreased from nearly eleven percent in 2015 to less than five percent in 2016, while the Virginia markets increased as a share of regional visitors. 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>2016 % of Total NC Visitors to Region</i>	<i>2015 % of Total NC Visitors to Region</i>	<i>2016 Coastal Share of NC Visitors from DMA</i>	<i>2015 Coastal Share of NC Visitors from DMA</i>
Raleigh-Durham (Fayetteville)	14.6%	18.0%	25.5%	29.6%
Greenville-New Bern-Washington	8.9%	5.6%	27.7%	26.2%
Norfolk-Portsmouth-Newport News, VA	8.0%	5.2%	42.9%	42.1%
Greensboro-High Point-Winston Salem	7.8%	5.6%	22.2%	28.8%
Richmond-Petersburg, VA	6.6%	3.5%	45.9%	42.3%
Washington DC Metro	5.5%	7.1%	17.5%	29.3%
Charlotte	4.6%	10.7%	11.1%	22.3%
Augusta	3.6%	0.4%	39.1%	4.8%
Greenville-Spartanburg-Asheville	2.8%	1.4%	7.4%	3.9%
Miami-Ft. Lauderdale	2.8%	0.1%	35.0%	14.3%
New York, NY	2.7%	3.6%	11.3%	16.9%
Philadelphia, PA	2.7%	3.1%	17.5%	27.8%
Baltimore	2.0%	2.1%	31.3%	26.1%
Nashville	1.8%	1.4%	41.7%	21.1%
Clarksburg-Weston, WV	1.6%	0.1%	80.0%	n/a
Wilmington	1.5%	2.0%	23.5%	14.0%
Huntsville-Decatur, AL	1.3%	0.1%	42.9%	16.7%
Myrtle Beach-Florence	1.2%	0.5%	15.8%	3.8%
Cleveland-Akron, OH	1.2%	2.9%	21.4%	56.3%

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

2016 Domestic Piedmont Region Travel Summary

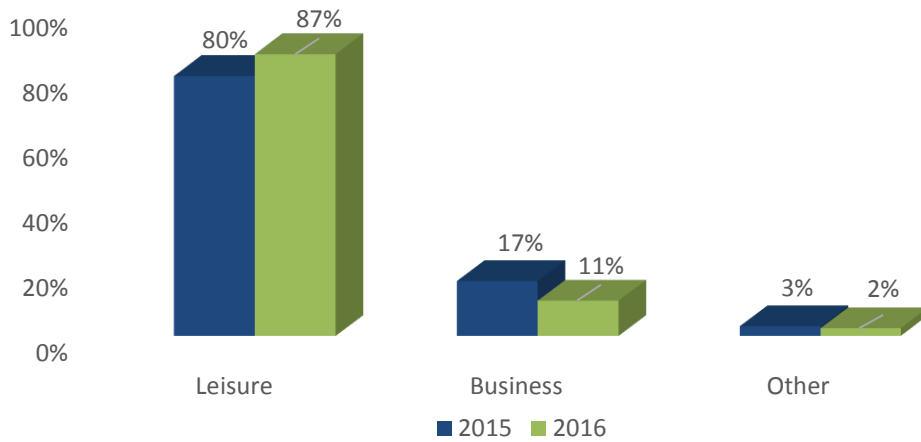
- ◆ In 2016, 68 percent of North Carolina visitors traveled to North Carolina’s Piedmont Region, approximately 32.8 million person-trips (approximately 26.5 million overnight person-trips). For marketing purposes, the Piedmont Region is made up of the 49 most central counties of North Carolina. *Note that the regional volume totals do not sum to the statewide volume total, as some visitors travel to multiple geographic regions in one visit.
- ◆ Eighty-five percent of all domestic visitors (87 percent of overnights) came to the Piedmont Region for pleasure purposes, while twelve percent of all visitors (11 percent of overnights, down from 17 percent in 2015) came to conduct business (includes meeting/convention).
- ◆ Travel to the Piedmont was more consistent seasonally than the other regions, though summer (June - August) welcomed the most visitors with thirty-one percent (and 31 percent of overnights). Spring (March - May) had the next highest proportion of visitors, with twenty-six percent of total visitors (28 percent of overnights). Fall (September - November) followed with twenty-five percent (24 percent of overnights). Winter (December - February) saw eighteen percent (17 percent of overnights) of the region’s annual visitors.
- ◆ Overnight visitors to the Piedmont Region spent an average of 3.6 nights in the region.
- ◆ Forty-eight percent of Piedmont Region visitors lodged in a hotel/motel, and forty-eight percent also stayed in a private home. One percent of overnight visitors to the region reported staying in a shared economy property such as AirBnB or VRBO.
- ◆ The average travel party size for all Piedmont Region visitors was 2.1 people. Twenty-seven percent of all travel parties to the region included children in the party (26 percent of overnights).
- ◆ Eighty-two percent of all overnight travelers to the Piedmont Region drove (includes personal automobile, rental, and motorcycle), while fourteen percent traveled by air.
- ◆ In 2016, the average household trip expenditure in the Piedmont Region was \$420. The average household trip expenditure for overnight visitors to the Piedmont Region was \$525. Daytrip parties to the Piedmont region spent approximately \$128 per visit in 2016.
- ◆ The top states of origin of *overnight* visitors to the Piedmont Region in 2016 were North Carolina (30%), Virginia (10%), South Carolina (8%), Florida (6%), Georgia (5%) and New York (4%).
- ◆ Forty-seven percent of the households (49 percent of overnight) that traveled to North Carolina’s Piedmont Region in 2016 had a household income over \$75,000.
- ◆ In 2016, Raleigh/Durham/Fayetteville (8.4%), was the top advertising market of origin for *overnight* travelers to the Piedmont Region, followed by Charlotte (8.3%), Greenville-Spartanburg-Asheville-Anderson (7.3%), Washington, DC (5.6%), New York (5.3%), Greenville-New Bern-Washington (4.9%) and Philadelphia (4.0%).

Piedmont Region Overnight Visitor Profile

Main Purpose of Visit

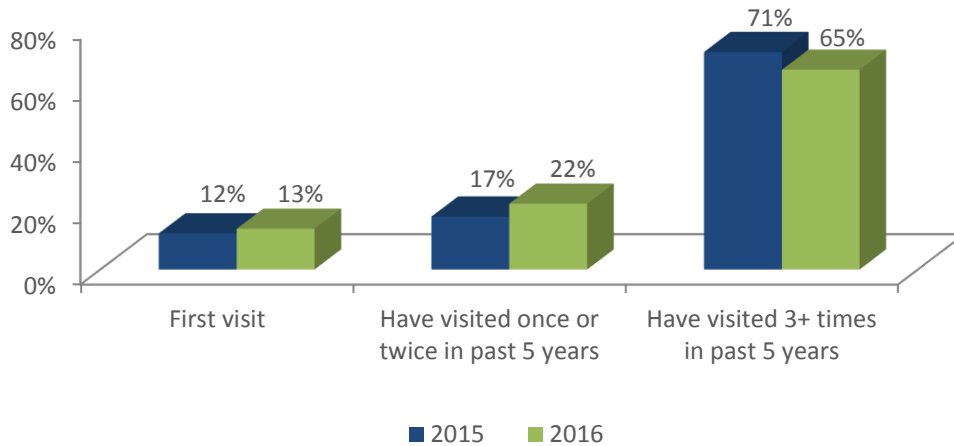
In 2016, eighty-seven percent of domestic overnight visitors came to the Piedmont Region for leisure purposes, which included visiting friends and relatives, outdoor recreation and entertainment/sightseeing. This was up from eighty percent in 2015 and seventy-two percent in 2014. Business travel visitors represented eleven percent of the region’s visitors.

2016 Primary Purpose of Overnight Trip to North Carolina's Piedmont Region



Repeat visitors to North Carolina comprised the largest proportion of Piedmont Region visitors. Thirteen percent of the region’s out-of-state visitors were first time visitors in 2016.

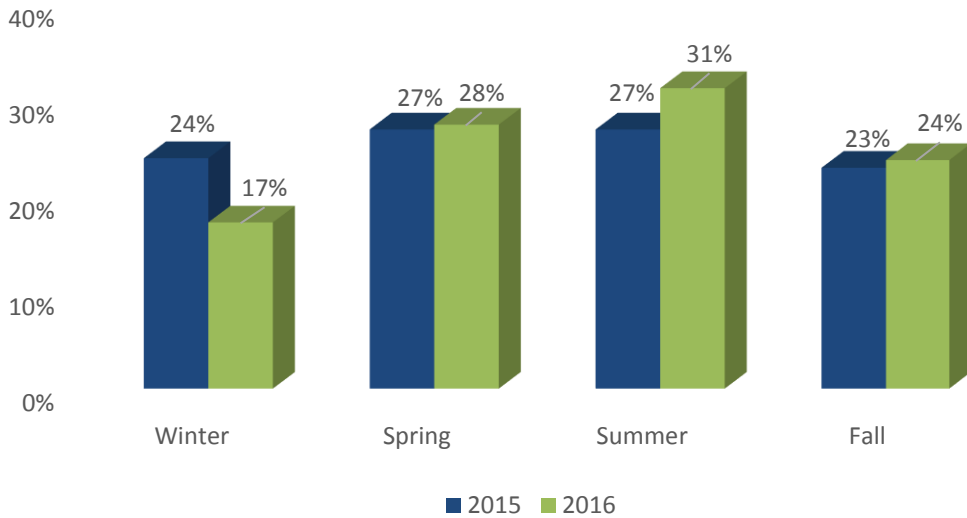
2016 First Time vs. Repeat Visitors to North Carolina's Piedmont Region



Travel Volume by Season

Though the Piedmont Region typically sees more consistent visitation throughout the year than the other two regions, 2016 saw the summer season increase in proportion of visitors from twenty-seven percent to thirty-one percent and winter decrease from twenty-four percent to seventeen percent.

2016 Overnight Travel by Season to North Carolina's Piedmont Region



Average Length of Stay

In 2016, an average of 3.6 nights was spent by visitors to North Carolina's Piedmont Region. This was an increase from the 2015 average length of stay of 3.1 nights. Data indicates that out-of-state visitors stay an average of 3.8 nights, while in-state visitors stay an average of 3.1 nights.

Travel Party Size

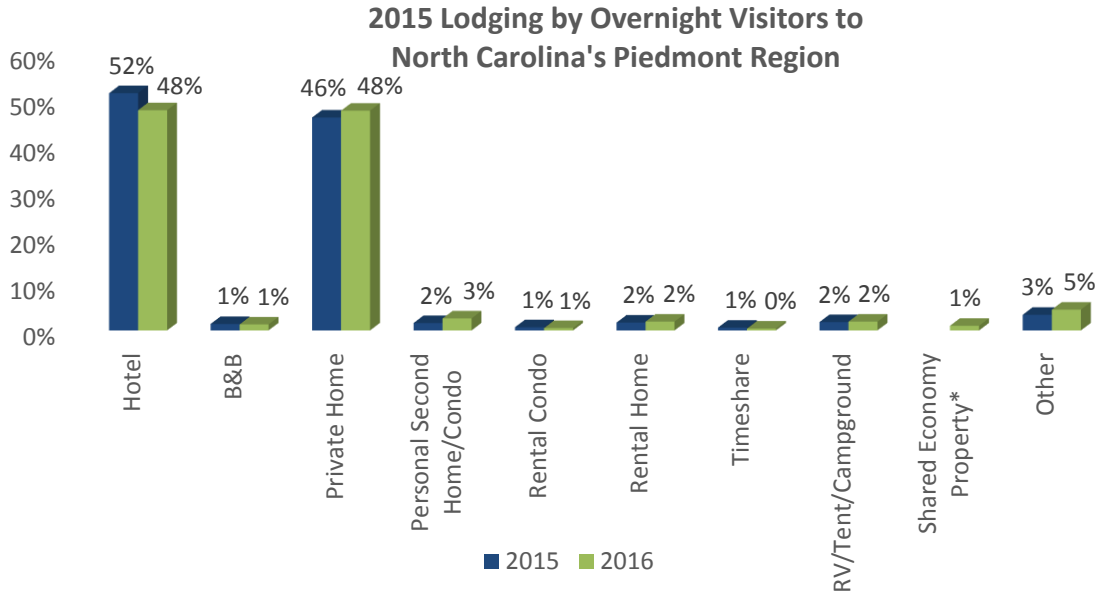
The average travel party size for all Piedmont Region overnight visitors was 2.1 people.

Children on Trip

Twenty-six 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.

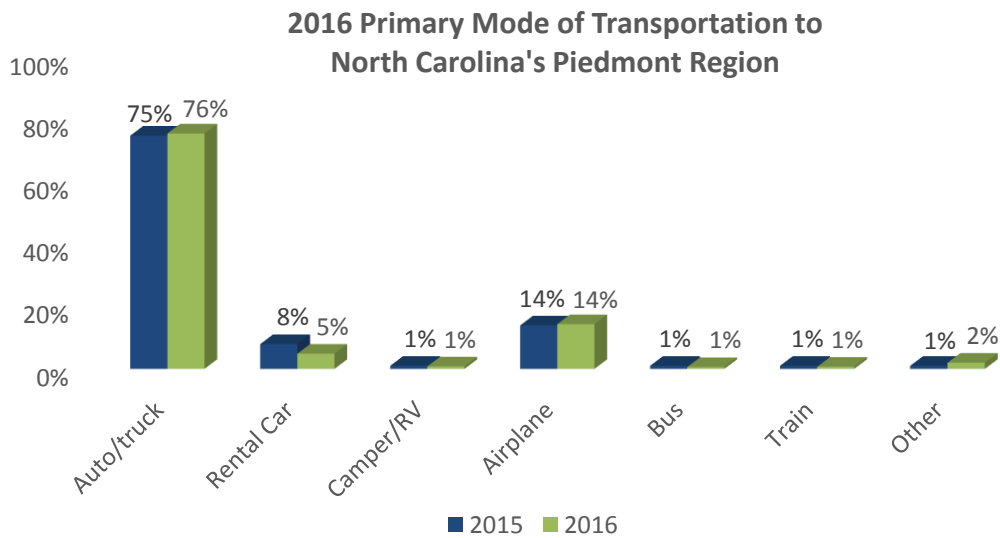
Lodging Used in Piedmont Region

In 2016, nearly half of Piedmont Region visitors stayed in a hotel/motel, and nearly half (48%) of visitors stayed in a private home. A new category was added to the survey in 2016, and the results reflected that approximately one percent of Piedmont Region visitors chose to use some type of shared economy lodging, such as AirBnB or VRBO. It should be noted that some visitors use more than one type of accommodation during a visit, so totals equal more than 100%.



Mode of Transportation

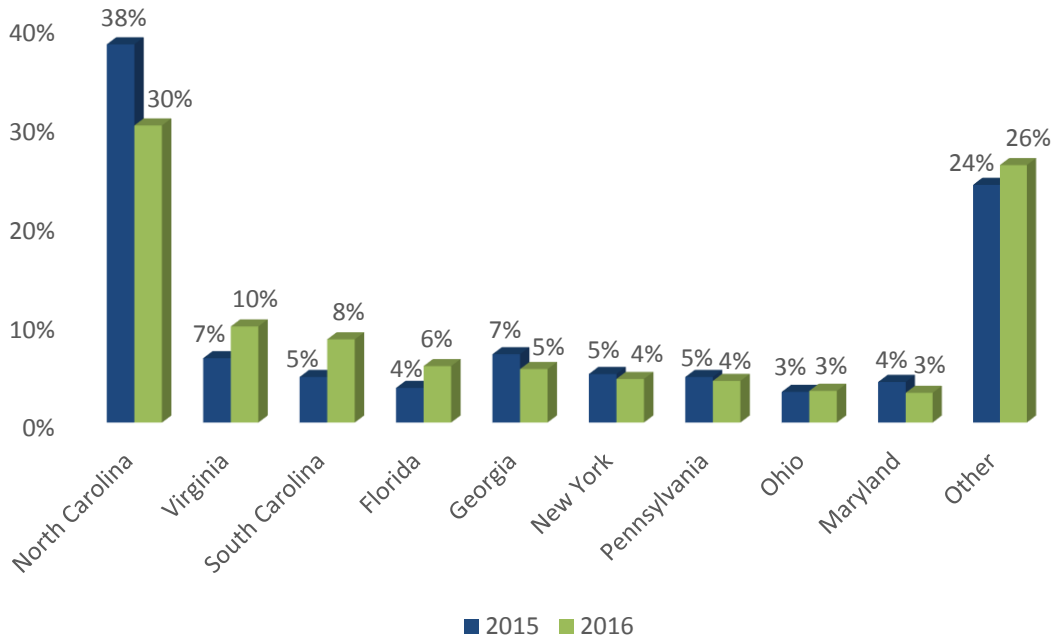
In 2016, personal auto was most used form of transportation (76%) to the Piedmont Region, however fourteen percent traveled by air.



Origin of Visitors

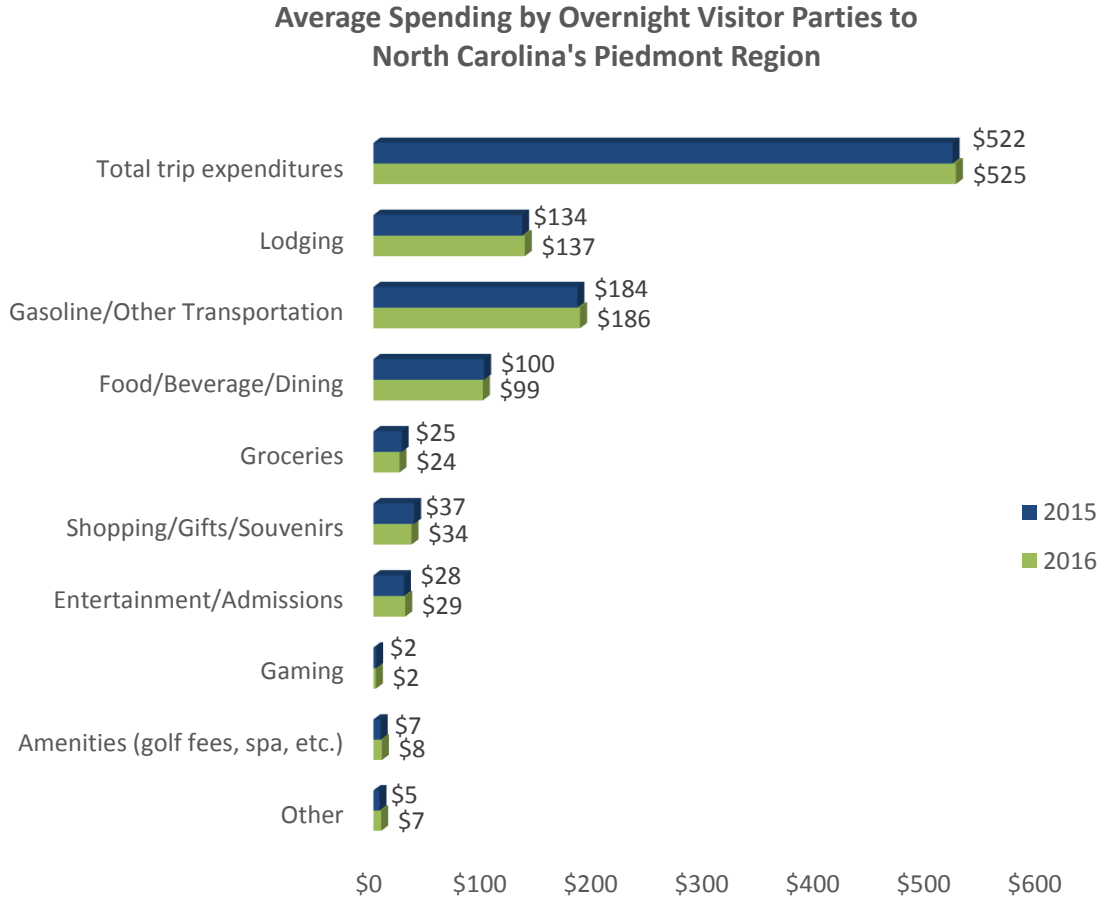
In 2016, the top states of origin for Piedmont Region overnight visitors included North Carolina (30%), Virginia (10%), South Carolina (8%), Florida (6%), Georgia (5%), New York (4%) and Pennsylvania (4%). The proportion of visitors to the Piedmont from Virginia, South Carolina and Florida increased from 2015 to 2016, while the proportion of in-state visitors to the region decreased.

2016 Top States of Origin of Overnight Visitors to North Carolina's Piedmont Region



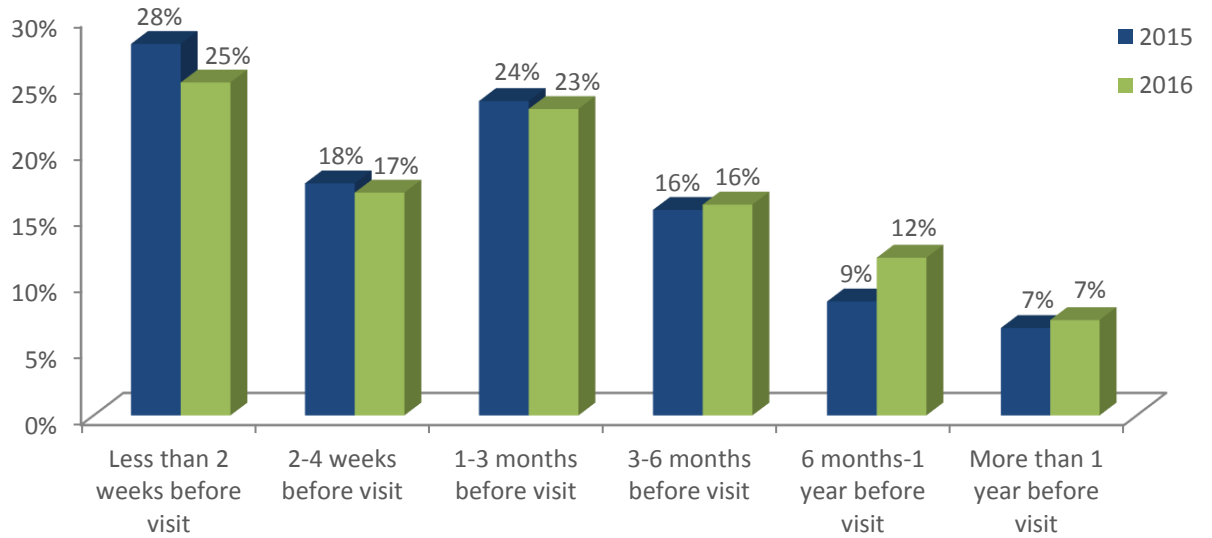
Amount Spent in Piedmont Region

The average overnight visitor party spending in the Piedmont Region was \$525, flat from 2015. While length of stay for overnight visitors increased from 2015 to 2016, the proportion of visitors who stayed in paid lodging in 2016 decreased from previous years, holding average party spending relatively flat.



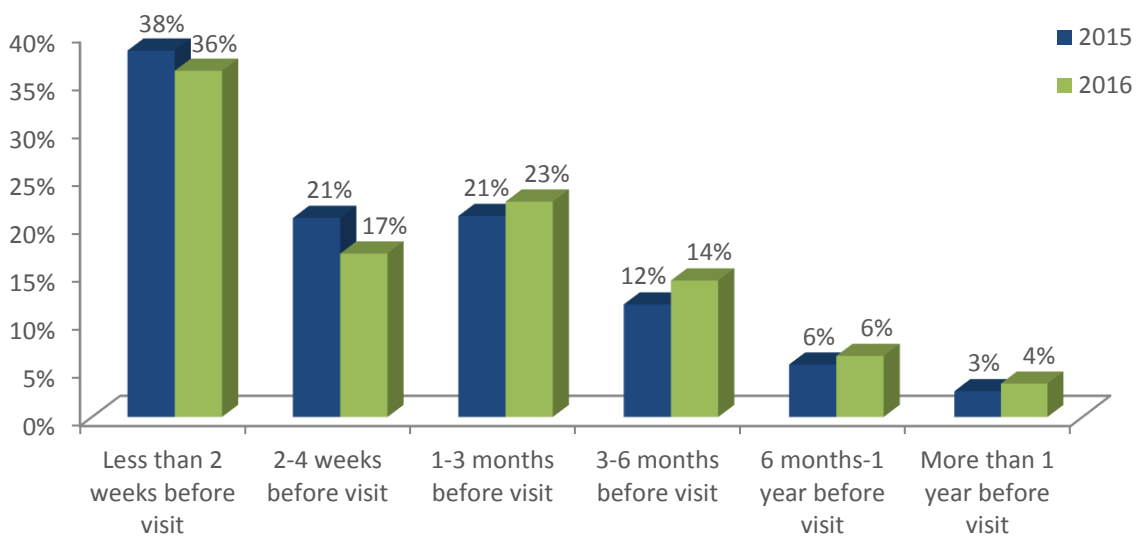
Travel Planning to Piedmont Region

2016 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 overall. More than forty percent of Piedmont Region visitors considered the state one month or less ahead of travel, and nearly fifty-four percent decided to visit less than one month prior to travel.

2016 Length of Time to *Decide On* NC as Travel Destination



Activities

The following chart provides activities participated in by Piedmont Region visitors in 2016. These are not indicative of purpose of trip, but activities participated in while in the North Carolina. Over one-third (37%) of the overnight visitors to the piedmont visited with relatives while in the region. Twenty-five percent shopped and nearly twenty-one percent visited friends. Other popular activities included fine dining (12%), urban sightseeing (9%) and rural sightseeing (9%). ****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	2016	2015
Visiting relatives	37.2%	34.6%
Shopping	25.1%	23.8%
Visiting friends	20.9%	20.6%
Fine dining	12.3%	13.9%
Urban sightseeing	9.0%	14.1%
Rural sightseeing	8.5%	12.0%
State park/Monument/Recreation area	7.4%	6.7%
Historic sites/churches	7.4%	8.5%
Museums	7.0%	9.4%
Nightclub/dancing	5.0%	3.9%
Old homes/mansions	4.9%	5.8%
Wildlife viewing	4.7%	3.6%
Wine tasting/winery tour	4.5%	1.4%
Craft Breweries	4.4%	3.3%
Hiking/Backpacking/Canyoneering	4.3%	2.0%
Other nature (photography, rockhounding, etc.)	4.1%	3.3%
Local/folk arts/crafts	3.9%	3.6%
Fishing	3.3%	3.4%
Gardens	3.3%	4.3%
Theater/drama	3.2%	1.6%
Special events/Festivals	3.1%	2.3%
Musical performance/show	2.9%	2.9%
Youth/Amateur/Collegiate/Sporting Event <u>Spectator</u>	2.9%	6.4%
Art galleries	2.7%	4.0%
Horseback riding	2.6%	0.6%
Golf	2.5%	2.8%
Spa/health club	2.3%	1.8%
Zoos/Aquariums Aviaries	2.1%	4.0%
Nature travel/ecotouring	2.0%	2.2%
Theme park/Amusement park/Water park	1.9%	2.4%
National park/Monument/Recreation area	1.9%	2.3%
Motor sports	1.7%	0.9%
Youth/Amateur/Collegiate/Sporting Event <u>Participant</u>	1.6%	1.6%
Native American ruins	1.5%	2.1%
Farms/Ranches/Agri-tours	1.5%	1.1%
Bird Watching	1.5%	1.9%

Demographic Profile of North Carolina Overnight Visitors to the Piedmont Region

Nearly two-thirds of the Piedmont Region’s overnight visitors (59.0%) of the visitors are married and twenty-seven percent have never married. Fourteen percent of the region’s visitors are divorced, widowed or separated.

The largest proportion of North Carolina Piedmont Region overnight visitors classify themselves as white (77.4%), and nearly fifteen percent classify themselves as black/African American.

The average Piedmont Region visitor is 44 years old and nearly two-thirds (63.2%) 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 Piedmont Region in 2016 was \$85,700. Nearly half (48.5%) of the visitor parties that traveled to North Carolina’s Piedmont Region in 2016 had a household income \$75,000 or over. Twenty-one percent had a household income of over \$125,000.

Nearly two-thirds (62.2%) 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 2016 was 2.8.

2016 Top Advertising Markets

In 2016, the top advertising markets sending overnight visitors to **North Carolina's Piedmont Region** were Raleigh-Durham-Fayetteville (8.4%), Charlotte (8.3%), Greenville-Spartanburg-Asheville (7.3%), Washington, DC (5.6%), New York, NY (5.3%), Greenville-New Bern-Washington (4.9%) and Philadelphia (4.0%). 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>2016 % of Total NC Visitors to Region</i>	<i>2015 % of Total NC Visitors to Region</i>	<i>2016 Piedmont Share of NC Visitors from DMA</i>	<i>2015 Piedmont Share of NC Visitors from DMA</i>
Raleigh-Durham (Fayetteville)	8.4%	13.5%	37.6%	58.6%
Charlotte	8.3%	8.7%	51.9%	47.3%
Greenville-Spartanburg-Asheville	7.3%	7.3%	52.1%	57.8%
Washington DC Metro	5.6%	5.2%	46.3%	56.0%
New York, NY	5.3%	5.6%	58.1%	69.2%
Greenville-New Bern-Washington	4.9%	3.3%	39.8%	41.5%
Philadelphia	4.0%	2.1%	67.5%	47.2%
Greensboro-High Point-Winston Salem	3.9%	3.5%	28.9%	47.5%
Norfolk-Portsmouth-Newport News	3.1%	1.5%	42.9%	31.6%
Atlanta	2.9%	5.3%	23.2%	44.8%
Columbia	2.3%	1.2%	53.3%	58.8%
Richmond-Petersburg	1.8%	1.1%	32.4%	34.6%
Orlando-Daytona Beach	1.5%	1.1%	66.7%	56.3%
Pittsburgh	1.4%	0.8%	76.9%	50.0%
Detroit	1.3%	0.7%	100.0%	54.5%
Cleveland-Akron	1.3%	0.9%	57.1%	50.0%
Wilmington	1.2%	2.3%	47.1%	41.9%
Myrtle Beach-Florence	1.2%	1.4%	42.1%	42.3%

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

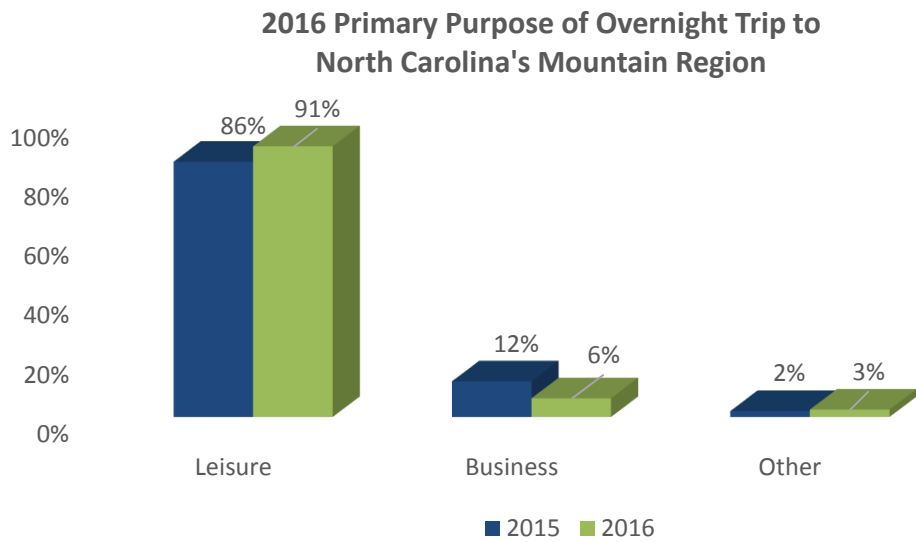
2016 Domestic Mountain Region Travel Summary

- ◆ In 2016, 29 percent of North Carolina visitors traveled to North Carolina’s Mountain Region, approximately 14.2 million person-trips (approximately 11.2 million overnight person-trips). For marketing purposes, the Mountain Region is made up of the 23 western-most counties of North Carolina. *Note that the regional volume totals do not sum to the statewide volume total, as some visitors travel to multiple geographic regions in one visit.
- ◆ Ninety-three percent of all domestic visitors (91 percent of overnight visitors), came to the Mountain Region for pleasure purposes, while nearly six percent of all visitors (6 percent of overnight visitors) came to conduct business (includes meeting/convention).
- ◆ Travel to the mountains of North Carolina was heaviest in the summer and fall. The summer (June – August) had the highest proportion of visitors, with thirty-seven percent of all 2016 mountain visitors (and 37 percent of overnights). The fall (September - November) followed with twenty-four percent of visitors (26 percent of overnights), followed by spring (March - May) with twenty percent (and 20 percent of overnights). The winter season welcomed nineteen percent of all mountain visitors (17 percent of overnights).
- ◆ Overnight visitors to the Mountain Region spent an average of 3.2 nights in the region.
- ◆ Sixty-five percent of Mountain Region visitors lodged in a hotel/motel, while nineteen percent stayed at a private home. Five percent stayed in a rental home, while four percent stayed personal second home/condo and three percent in an RV/tent/campground. Three percent of visitors to the region reported staying in a shared economy property in 2016.
- ◆ The average travel party size for all Mountain Region visitors was 2.3 people. Thirty percent of all travel parties to the region included children in the party (27 percent of overnights).
- ◆ Ninety-four percent of *overnight* travelers to the Mountain Region drove (includes personal automobile, rental vehicle, RV/camper), while five percent traveled by air.
- ◆ In 2016, the average trip expenditure in the Mountain Region was \$485. The average trip expenditure for overnight visitors to the Mountain Region was \$611. Daytrip parties to the Mountain Region spent approximately \$171 per visit.
- ◆ The top states of origin of *overnight* visitors to the Mountain Region were North Carolina (43%), South Carolina (12%), Georgia (9%), Tennessee (7%), Virginia (6%) and Florida (6%).
- ◆ Forty-four percent of the households (47 percent of overnight) that traveled to North Carolina’s Mountain Region in 2016 had a household income over \$75,000.
- ◆ In 2016, Atlanta (13.9%), was the top DMA of origin for *overnight* travelers to the Mountain Region, followed by Greenville/Spartanburg/Anderson SC/Asheville (13.6%), Charlotte (11.0%), Raleigh/Durham/Fayetteville (10.5%) and Greensboro-High Point-Winston Salem (7.4%).

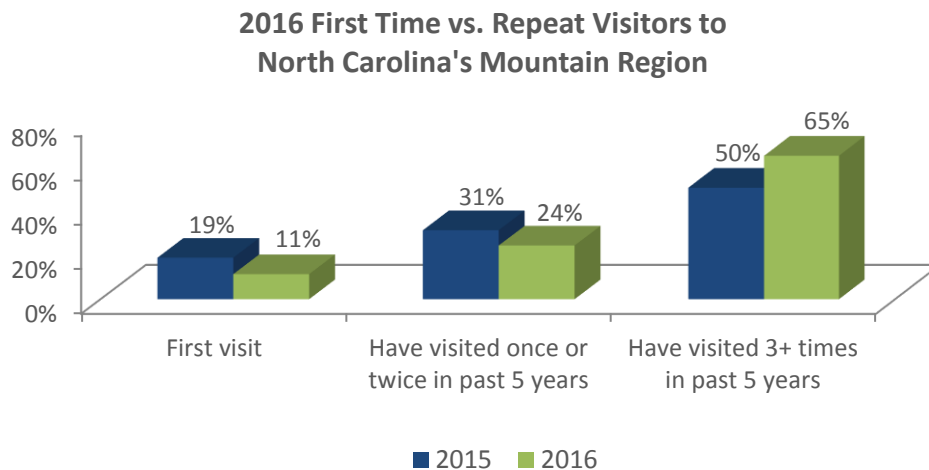
Mountain Region Overnight Visitor Profile

Main Purpose of Visit

In 2016, ninety-one percent of domestic overnight visitors came to the Mountain Region for leisure purposes, which included visiting friends and relatives, outdoor recreation and entertainment/sightseeing. Six percent of domestic overnight visitors came for general business, convention, seminar or other group meeting, down from twelve percent in 2015. Three percent traveled to the Mountain Region for other purposes.

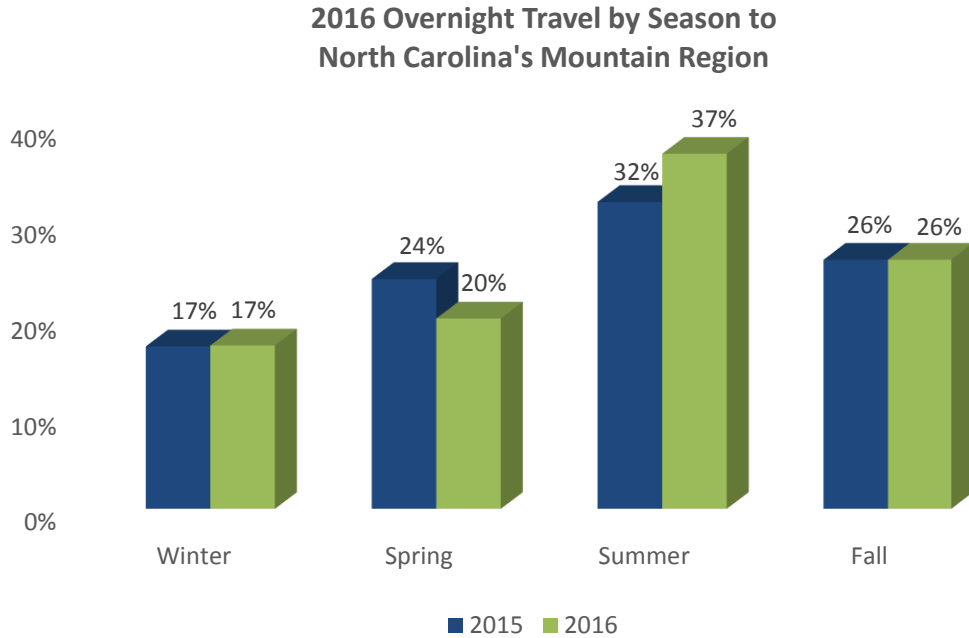


The proportion of visitors to North Carolina’s Mountain Region who were first time visitors was eleven percent in 2016, while the majority of overnight visitors (65%) have visited more than three times in the past five years.



Travel Volume by Season

When examining visitation based on the typical seasonal schedule, the summer season (June through August) was the most popular in terms of proportion of overnight visitors to the Mountain Region in 2016 with thirty-seven percent, up from thirty-two percent in 2015. Fall (September through November) followed with twenty-six percent. The spring (March through May) was next with twenty percent, followed by winter (December through February) with seventeen percent.



Average Length of Stay

In 2016, an average of 3.2 nights was spent by visitors to North Carolina’s Mountain Region, similar to 2015. Data indicates that out-of-state visitors stay an average of 3.7 nights, while in-state visitors stay an average of 2.5 nights.

Travel Party Size

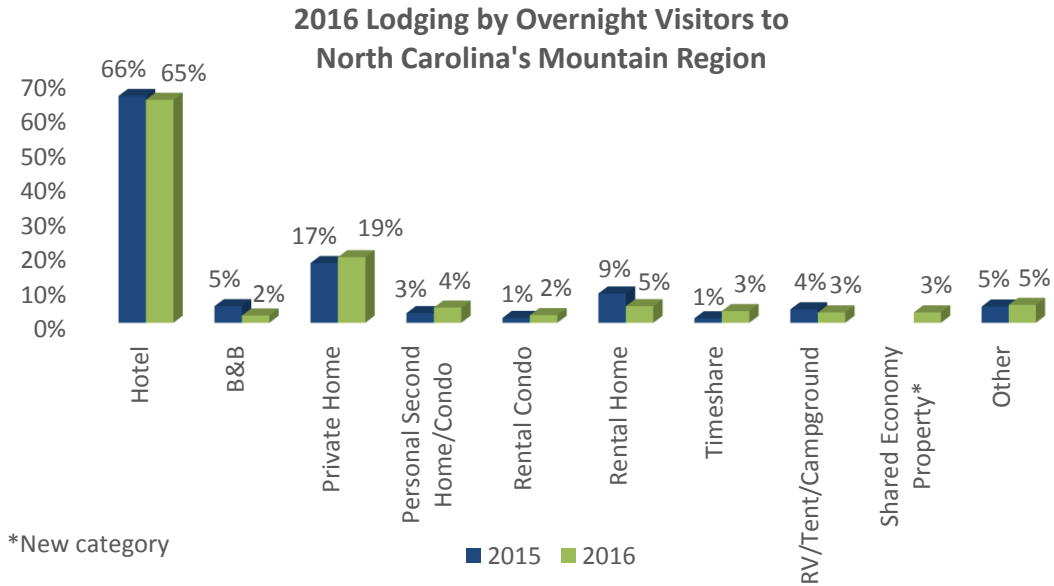
The average travel party size for Mountain Region overnight visitors was 2.3 people, up slightly from 2.2 in 2015.

Children on Trip

Twenty-seven 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 1.7.

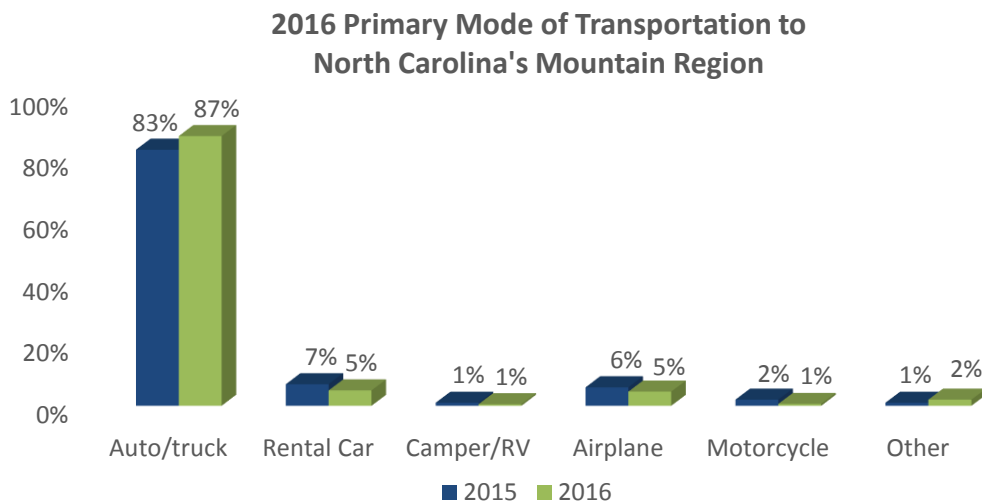
Lodging Used in Mountain Region

In 2016, two-thirds of Mountain Region visitors stayed in a hotel/motel, nineteen percent lodged in a private home, two percent stayed in a bed and breakfast and five percent stayed in a rental home. A new category was added to the survey in 2016, and the results reflected that approximately three percent of Mountain Region visitors chose to use some type of shared economy lodging, such as AirBnB or VRBO. It should be noted that some visitors use more than one type of accommodation during a visit, so totals equal more than 100%.



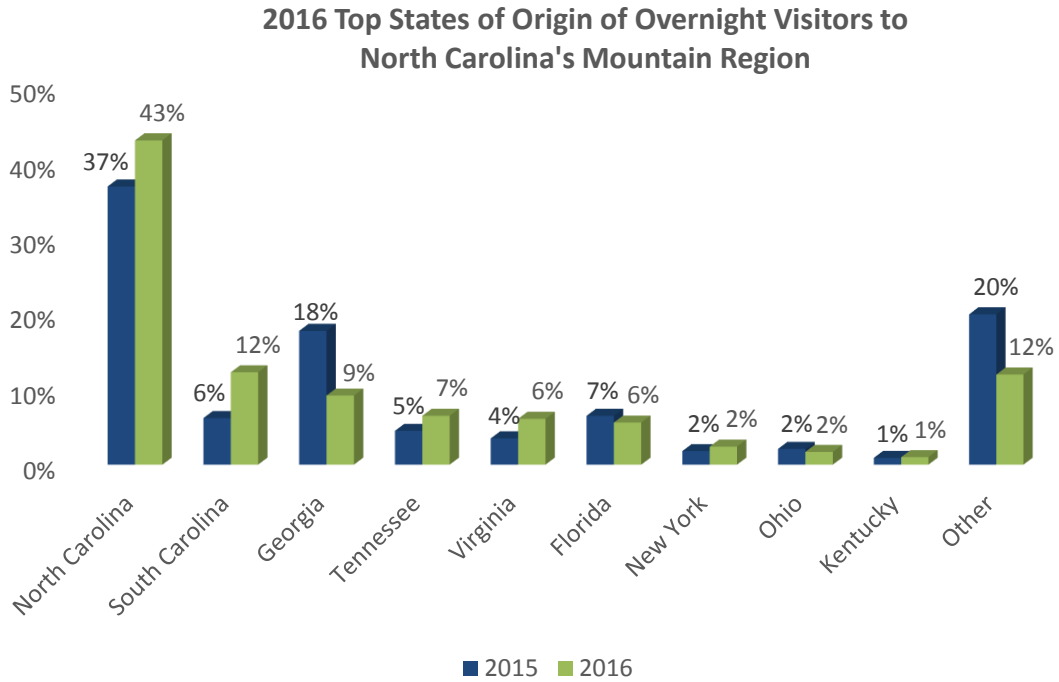
Mode of Transportation

In 2016, the personal auto was by far the dominant form of transportation (87%) for overnight visitors to the Mountain Region, while five percent traveled by air.



Origin of Visitors

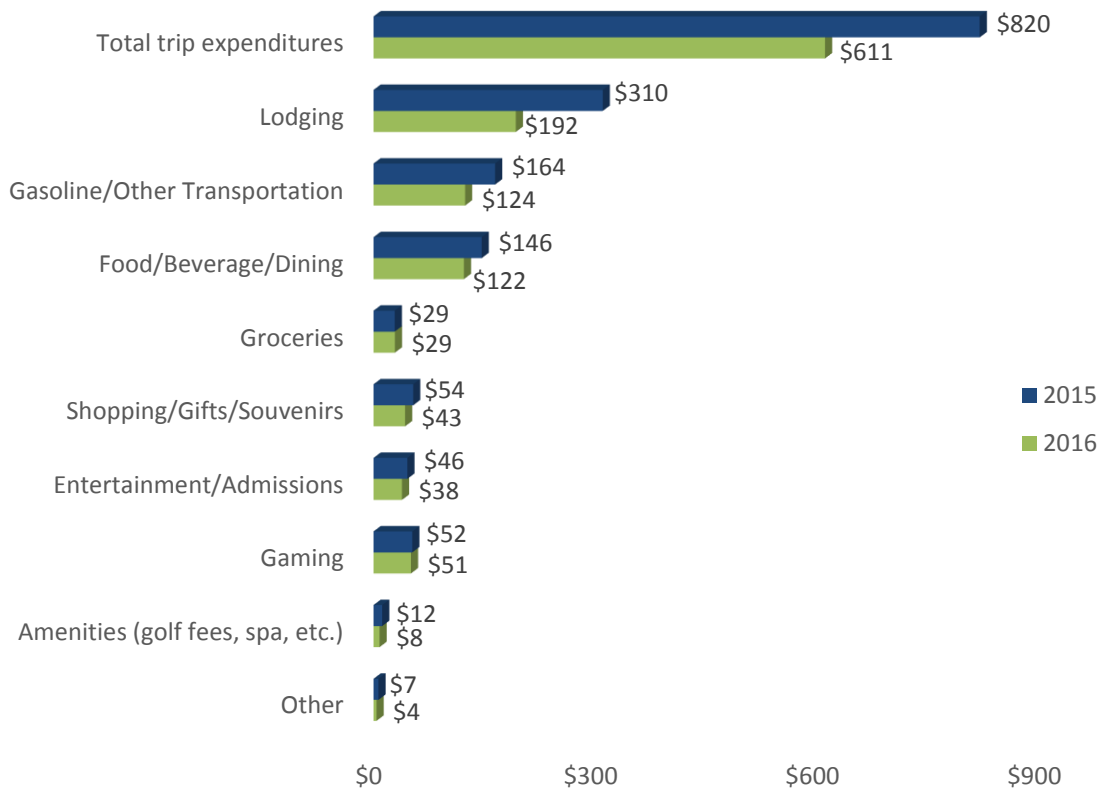
In 2016, the top states of origin for Mountain Region overnight visitors included North Carolina (43%), South Carolina (12%), Georgia (9%), Tennessee (7%), Virginia (6%) and Florida (6%). The proportion of in-state overnight visitors and those from South Carolina, Tennessee and Virginia increased from 2015 to 2016, while the proportion of overnight visitors from Georgia and Florida decreased.



Amount Spent in Mountain Region

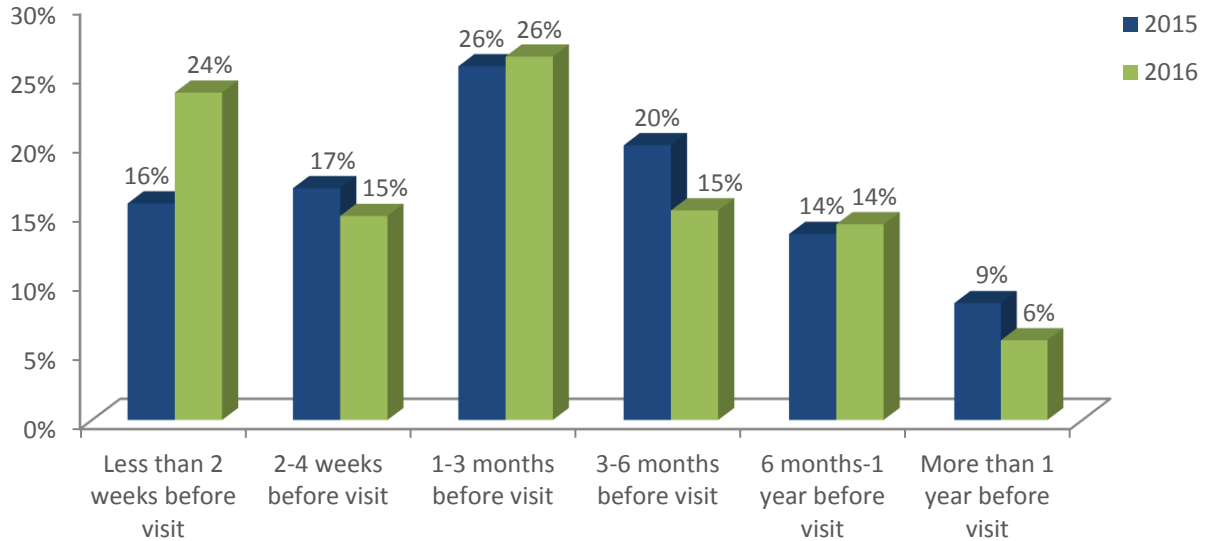
The average overnight visitor party spending in the Mountain Region was \$611, down twenty-five percent from 2015. Most of the decrease in average spending was in the lodging sector. While the Mountain Region welcomed approximately seven percent more visitors in 2016 (and the number of room nights sold increased), length of stay in the region was flat from 2015 to 2016. As well, a larger proportion of overnight visitors stayed in non-paid accommodations than in 2015, which would have hampered average trip spending.

Average Spending by Overnight Visitor Parties to North Carolina's Mountain Region



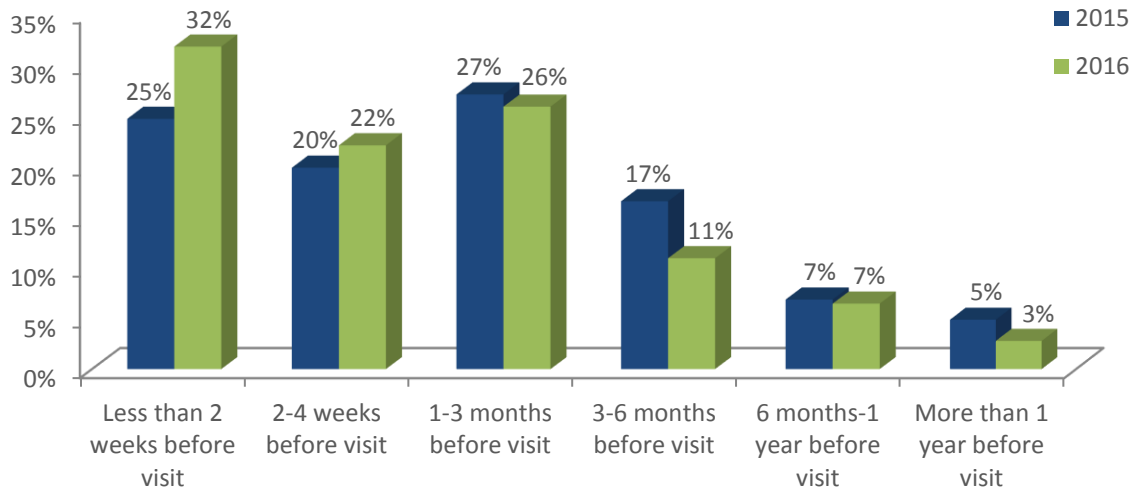
Travel Planning to Mountain Region

2016 Length of Time to *Consider* NC as Travel Destination



Nearly forty percent of Mountain Region visitors *considered* the state one month or less ahead of travel, and twenty percent *considered* the visit more than six months prior to travel. Visitors to the region made the decision on the travel destination within a shorter time frame than in 2015. More than half of the visitors made the decision one month or less ahead of travel.

2016 Length of Time to *Decide On* NC as Travel Destination



Activities

The following table provides activities participated in by Mountain Region visitors in 2016. These are not indicative of purpose of trip, but what activities visitors participate in while in North Carolina. The proportion of mountain visitors who participated in shopping, visiting friends and relatives, hiking/backpacking, winery tours, special events and horseback riding increased from 2015-2016.

***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	2016	2015
Shopping	34.1%	29.7%
Rural sightseeing	20.2%	29.7%
Visiting relatives	18.2%	12.3%
Visiting friends	18.0%	10.5%
Historic sites/churches	17.6%	22.4%
Fine dining	15.3%	22.0%
Hiking/Backpacking/Canyoneering	15.2%	7.2%
Casino/gaming	13.2%	17.2%
Old homes/mansions	11.8%	17.6%
Wildlife viewing	11.8%	16.3%
Craft Breweries	11.6%	9.8%
Urban sightseeing	11.3%	16.6%
Local/folk arts/crafts	11.2%	13.0%
Wine tasting/winery tour	11.1%	7.1%
State park/Monument/Recreation area	10.8%	19.5%
Museums	9.0%	11.0%
National park/Monument/Recreation area	7.2%	15.1%
Nature travel/ecotouring	7.1%	8.5%
Art galleries	6.9%	9.6%
Native American ruins	5.9%	4.8%
Other nature (photography, rockhound, etc.)	5.8%	7.3%
Gardens	5.7%	13.2%
Horseback Riding	4.8%	2.0%
Farms/Ranches/Agri-tours	4.4%	3.1%
Special Events/Festivals	4.0%	0.9%
Musical performance/show	3.7%	4.3%
Theater/Drama	3.3%	1.4%
Bird Watching	3.2%	3.6%
Whitewater rafting/kayaking/canoeing/paddleboarding	2.8%	3.1%
Fishing	2.6%	5.8%
Nightclub/dancing	2.4%	6.1%
Youth/Amateur/Collegiate/Sporting Event <u>Spectator</u>	2.4%	1.7%
Zoos/Aquariums/Aviaries	2.4%	6.2%
Theme Park/Amusement Park/Water Park	2.2%	3.1%
Rock/mountain climbing	1.9%	4.7%
Area where a TV show or movie was filmed	1.9%	1.6%
Golf	1.7%	3.4%
Mountain biking	1.7%	3.2%

2016 Demographic Profile of North Carolina Overnight Visitors to the Mountain Region

Two-thirds of North Carolina Mountain Region overnight visitors are married, while twenty-one percent of the region’s visitors have never been married. Thirteen percent are divorced, widowed or separated.

The largest proportion of North Carolina Mountain Region overnight visitors classify themselves as white (91%), and five percent classify themselves as black/African American. Nearly three percent reported that they are American Indian.

The average Mountain Region visitor is 46 years old, and nearly three-fourths (71%) of Mountain Region overnight visitor parties have a household head with a college degree or higher.

The average household income of an overnight visitor party to the Mountain Region in 2016 was \$89,780. Nearly half (47.3%) of the overnight visitor parties that traveled to North Carolina’s Mountain Region in 2016 had a household income \$75,000 or over. Twenty-four percent had a household income of over \$125,000.

Nearly sixty percent (57.5%) of overnight visitor parties reported that the head of household is employed, while twenty-five percent are retired, up from eighteen percent in 2015. The remainder reported “not employed” as work status.

The average household size of a North Carolina Mountain Region overnight visitor party in 2016 was 2.7.

2016 Top Advertising Markets

In 2016, the top advertising markets sending overnight visitors to **North Carolina's Mountain Region** were Atlanta (13.9%), Greenville-Spartanburg-Asheville-Anderson (13.6%), Charlotte (11.0%), Raleigh/Durham (10.5%), Greensboro-High Point-Winston Salem (7.4%) and Myrtle Beach-Florence (2.7%). As compared to 2015, in terms of proportion of visitors, the region saw growth from the Atlanta, Greenville-Spartanburg, Raleigh-Durham and Greensboro-High Point-Winston Salem 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>2016 % of Total NC Visitors to Region</i>	<i>2015 % of Total NC Visitors to Region</i>	<i>2016 Mountain Share of NC Visitors from DMA</i>	<i>2015 Mountain Share of NC Visitors from DMA</i>
Atlanta	13.9%	12.5%	52.4%	44.8%
Greenville-Spartanburg-Asheville-Anderson	13.6%	10.1%	44.7%	34.3%
Charlotte	11.0%	13.3%	31.5%	31.1%
Raleigh-Durham (Fayetteville)	10.5%	6.5%	22.1%	11.8%
Greensboro-High Point-Winston Salem	7.4%	4.1%	25.6%	23.7%
Myrtle Beach-Florence	2.7%	1.1%	42.1%	15.4%
Washington, DC	2.6%	1.0%	10.0%	4.0%
New York	2.6%	2.5%	12.9%	13.8%
Nashville	2.0%	1.0%	50.0%	15.8%
Richmond-Petersburg	1.9%	0.2%	16.2%	3.8%
Augusta	1.8%	2.8%	26.1%	47.6%
Roanoke-Lynchburg	1.7%	0.4%	35.7%	4.5%
Columbia	1.7%	1.0%	16.7%	17.6%
Knoxville	1.5%	1.2%	41.7%	33.3%
Miami-Ft. Lauderdale	1.5%	0.7%	25.0%	28.6%
Cleveland-Akron	1.4%	0.7%	28.6%	18.8%
Chicago	1.3%	1.1%	44.4%	26.7%
Chattanooga	1.2%	2.8%	15.4%	58.8%
Greenville-New Bern-Washington	1.1%	0.6%	3.6%	3.1%

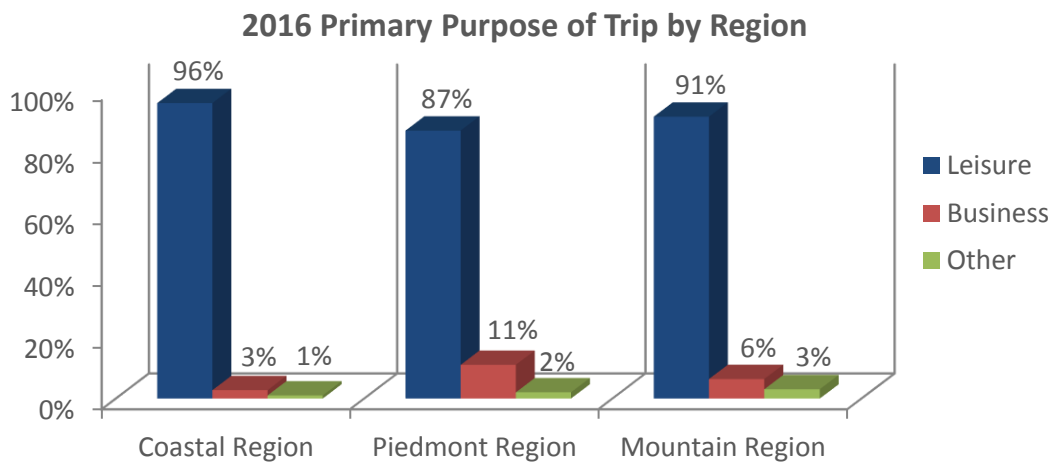
Note: Advertising markets defined by Nielsen's Designated Market Area (DMA)

2016 Regional Comparison

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

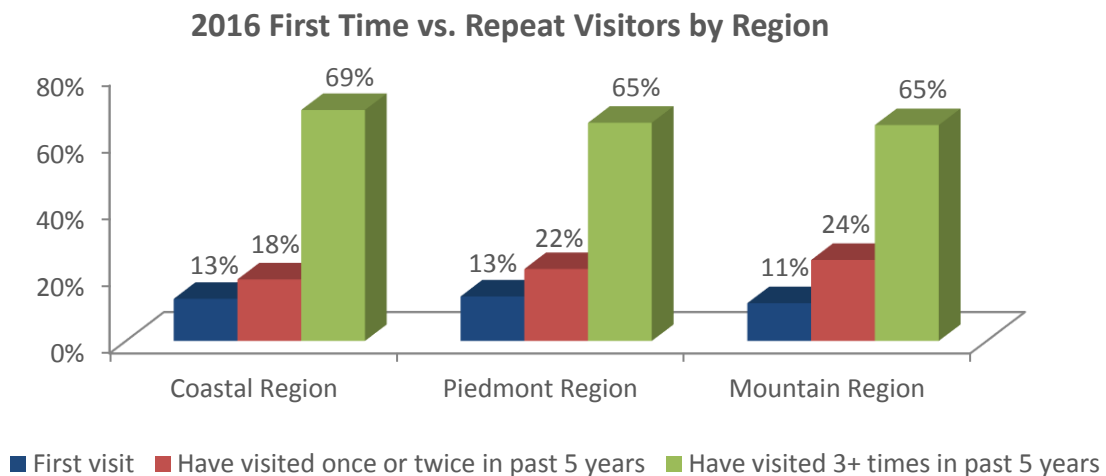
Purpose of Trip

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, though having the largest share of business travelers (11%) of the three regions, saw the share of business travelers drop from seventeen percent in 2015.



First Time vs. Repeat Visitors

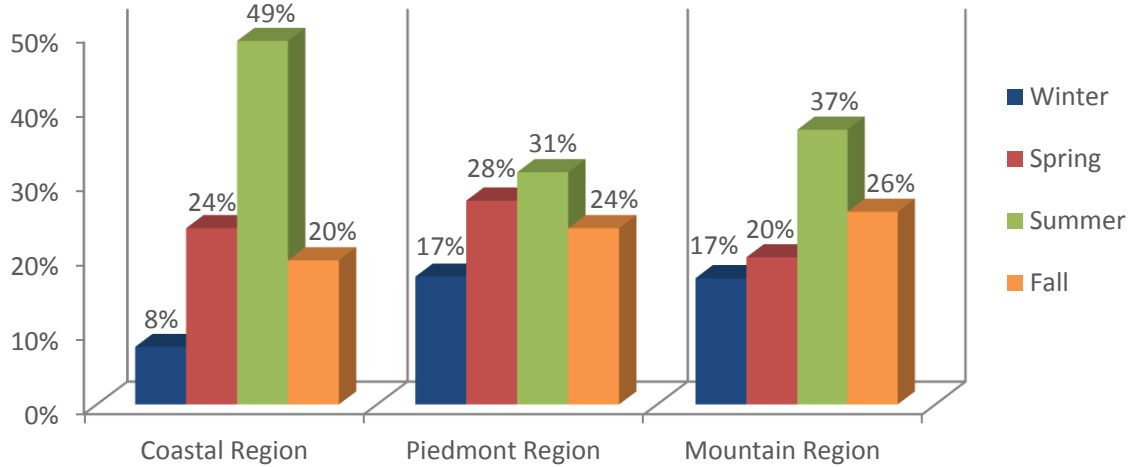
The majority of each region's visitors are repeat visitors, though the Coastal Region saw a slightly larger proportion of frequent, repeat visitors than the other two regions in 2016.



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.

2016 Season of Travel by Region



Average Length of Stay for Overnight Visitors

Coastal Region All Overnight	Piedmont Region All Overnight	Mountain Region All Overnight
4.9 nights	3.6 nights	3.2 nights
Coastal Region Out-of-State	Piedmont Region Out-of-State	Mountain Region Out-of-State
5.7 nights	3.8 nights	3.7 nights
Coastal Region Resident	Piedmont Region Resident	Mountain Region Resident
3.8 nights	3.1 nights	2.5 nights

Travel Party Size for Overnight Visitors

Coastal Region	Piedmont Region	Mountain Region
2.5 people	2.1 people	2.3 people
Coastal Region Out-of-State	Piedmont Region Out-of-State	Mountain Region Out-of-State
2.6 people	2.1 people	2.0 people
Coastal Region Resident	Piedmont Region Resident	Mountain Region Resident
2.4 people	2.2 people	2.6 people

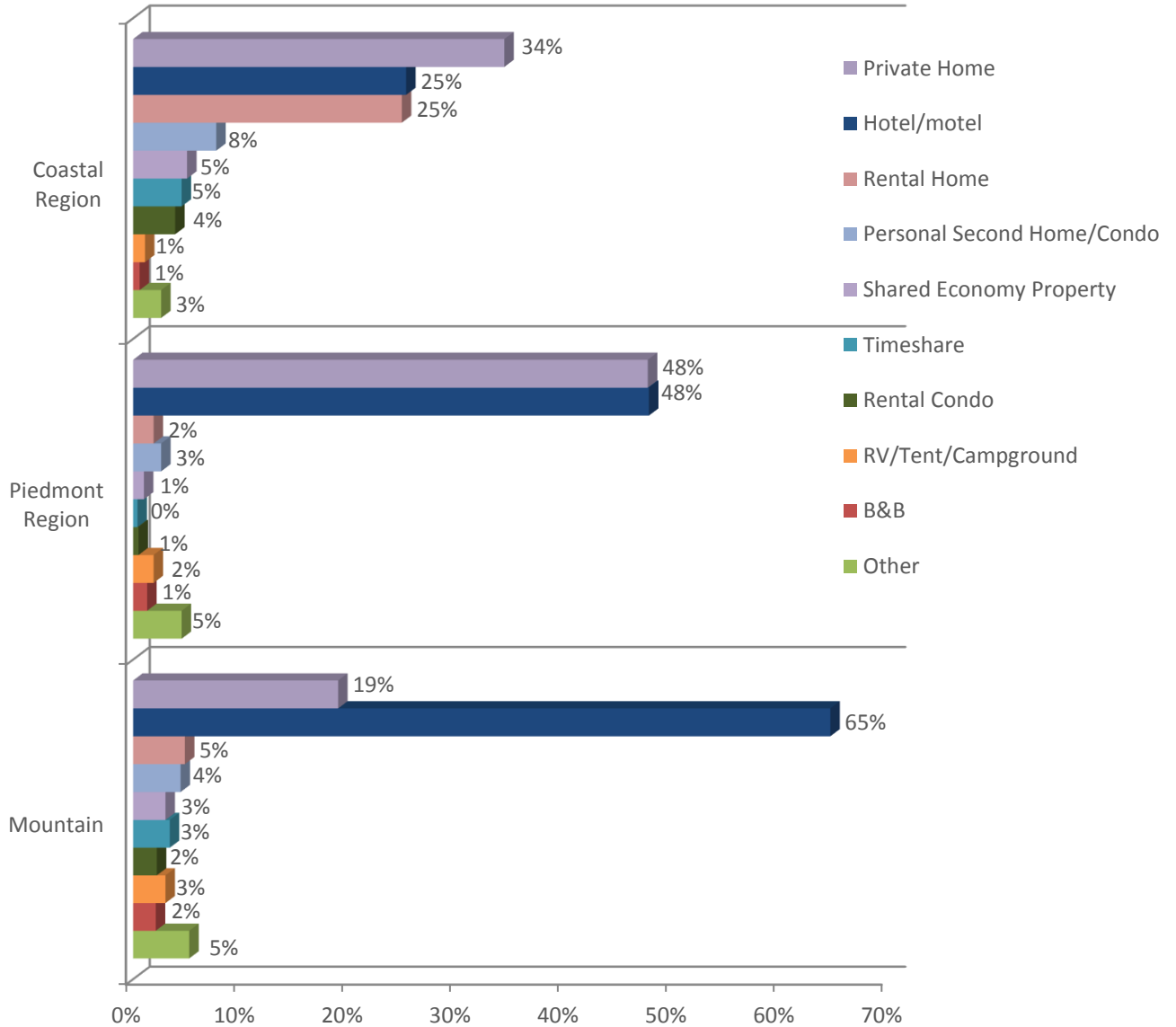
Children on Trip for Overnight Visitors

Coastal Region	Piedmont Region	Mountain Region
40.8%	25.8%	27.4%
Coastal Region Out-of-State	Piedmont Region Out-of-State	Mountain Region Out-of-State
43.5%	24.3%	24.6%
Coastal Region Resident	Piedmont Region Resident	Mountain Region Resident
37.0%	28.5%	31.3%

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 (65%), and while one-fourth of Coastal Region visitors also stay in hotels/motels, many stay in private and rental homes as well.

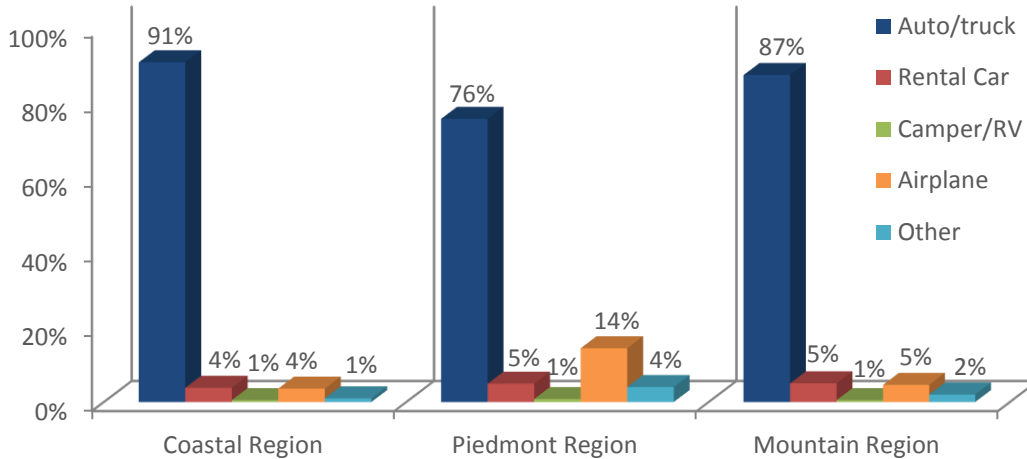
2016 Lodging by Overnight Visitors by Region



Mode of Transportation

Not surprisingly, auto transportation was the primary method of transportation for North Carolina visitors. The Piedmont Region, with the most and largest airports, saw the most overnight travelers using air transportation (14%).

2016 Primary Transportation by Overnight Visitors by Region



Origin of Overnight Visitors

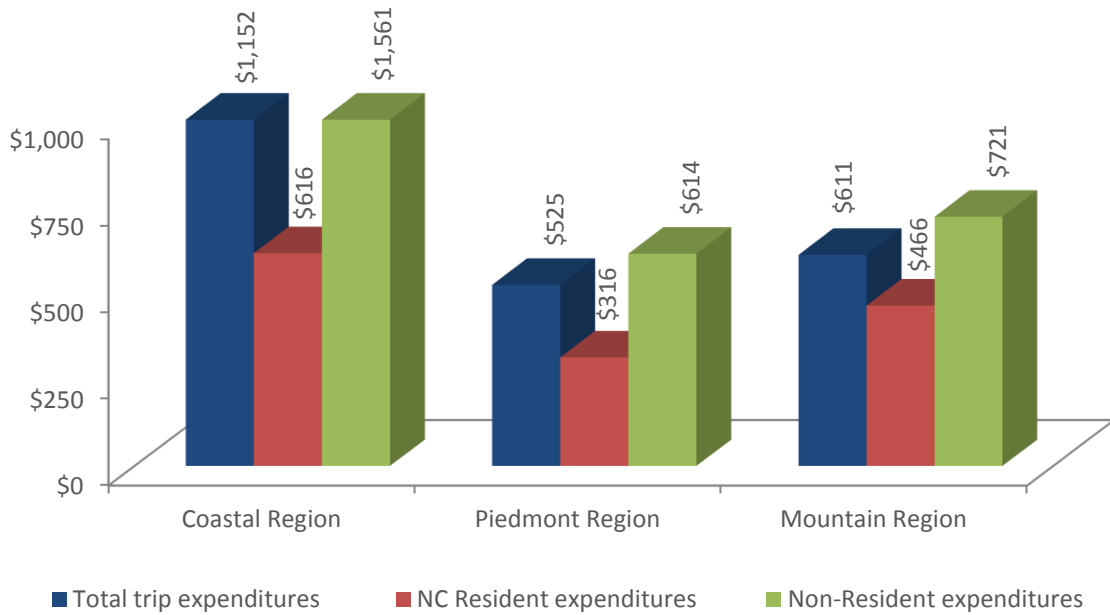
North Carolina is the top state of origin for all three regions of the state. In-state residents comprise more than one-third of the state’s overnight visitors, and in each of the regions. The other top market states are similar, though there are some differences in rank between regions.

Coastal Region	Piedmont Region	Mountain Region
North Carolina (43.3%)	North Carolina (30.0%)	North Carolina (43.0%)
Virginia (14.7%)	Virginia (9.7%)	South Carolina (12.3%)
South Carolina (6.2%)	South Carolina (8.4%)	Georgia (9.2%)
Maryland (4.5%)	Florida (5.7%)	Tennessee (6.5%)
Tennessee (3.7%)	Georgia (5.4%)	Virginia (6.1%)
New York (3.7%)	New York (4.4%)	Florida (5.6%)
Florida (3.6%)	Pennsylvania (4.2%)	New York (2.4%)
Pennsylvania (3.5%)	Ohio (3.2%)	Ohio (1.7%)
Ohio (2.4%)	Maryland (3.0%)	Kentucky (1.2%)
West Virginia (2.2%)	New Jersey (2.9%)	Maryland (1.1%)

Trip Expenditures

Coastal Region visitor parties, on average, spend more than other regional visitors. 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.

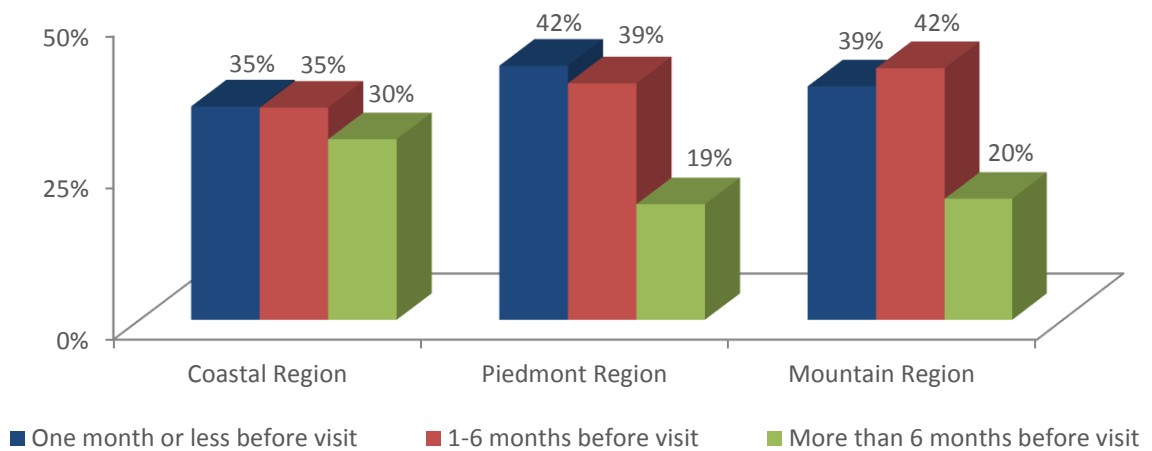
2016 Average Trip Spending by Overnight Visitor Parties by Region



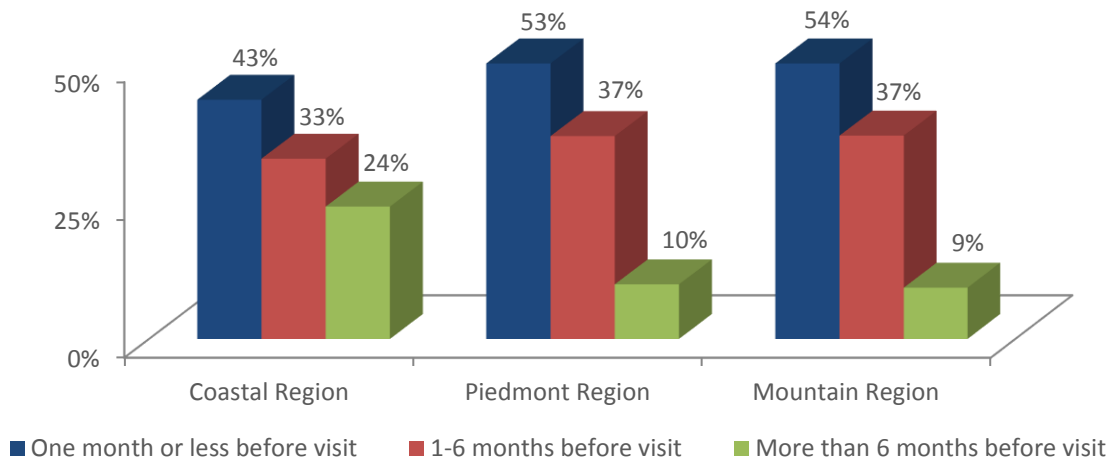
Trip Planning

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 (42%) consider a trip less than one month prior to the visit, and nearly half (43%) make the decision to visit less than one month before the visit.

How Far in Advance Overnight Trip to North Carolina was Considered



How Far in Advance Overnight Trip to North Carolina was Decided



Activities

Activities participated in by North Carolina overnight travelers in 2016 vary somewhat by region, but common activities between regions include visiting friends and relatives, shopping and sightseeing. Mountain region visitors tend to 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.**

Coastal Region	Piedmont Region	Mountain Region
Beach	Visiting relatives	Shopping
Shopping	Shopping	Rural sightseeing
Visiting Relatives	Visiting friends	Visiting relatives
Fine Dining	Fine dining	Visiting friends
Historic Sites/Churches	Urban sightseeing	Historic sites/churches
Visiting Friends	Rural sightseeing	Fine dining
Fishing (fresh or saltwater)	State park/Monument/Recreation area	Hiking/Backpacking/Canyoneering
Rural Sightseeing	Historic sites/churches	Casino/gaming
State Park/Monument/Recreation area	Museums	Old homes/mansions
Museums	Nightclub/dancing	Wildlife viewing
National Park/Monument/Recreation area	Old homes/mansions	Craft Breweries
Urban Sightseeing	Wildlife viewing	Urban sightseeing
Wildlife Viewing	Wine tasting/winery tour	Local/folk arts/crafts
Craft Breweries	Craft Breweries	Wine tasting/winery tour
Zoos/Aquariums/Aviaries	Hiking/Backpacking/Canyoneering	State park/Monument/Recreation area
Other nature (photography, rockhounding, etc.)	Other nature (photography, rockhounding, etc.)	Museums
Biking/Road Biking/Cycling	Local/folk arts/crafts	National park/Monument/Recreation area
Old Homes/Mansions	Fishing	Nature travel/ecotouring
Golf	Gardens	Art galleries
Theme Park/Amusement Park/Water Park	Theater/drama	Native American ruins
Gardens	Special events/Festivals	Other nature (photography, rockhound, etc.)
Art Galleries	Musical performance/show	Gardens
Nightclubs/Dancing	Youth/Amateur/Collegiate/Sporting Event <u>Spectator</u>	Horseback Riding
Musical performance/show	Art galleries	Farms/Ranches/Agri-tours
Hiking/Backpacking	Horseback riding	Special Events/Festivals
Theater/drama	Golf	Musical performance/show
Wine Tasting/Winery Tour	Spa/health club	Theater/Drama

2016 Demographic Profile for Overnight Visitor Parties

	Coastal Region	Piedmont Region	Mountain Region
Average age of household head	47 years of age	44 years of age	46 years of age
Education of Household Head			
High school or less	17.2%	15.9%	12.2%
Some college - no degree	23.6%	20.9%	17.0%
Completed college	38.9%	43.6%	52.1%
Post Graduate College	20.3%	19.6%	18.8%
Employment of Household Head			
Employed	63.3%	62.2%	57.5%
Retired	20.0%	16.3%	25.4%
Not employed	16.7%	21.5%	17.1%
Annual Household Income			
Less than \$30,000	18.9%	15.3%	12.1%
\$30,000-\$49,999	14.2%	14.2%	14.5%
\$50,000-\$74,999	13.2%	22.0%	26.1%
\$75,000 & over	53.7%	48.5%	47.3%
Marital Status			
Married	65.8%	59.0%	65.6%
Never married	21.3%	26.6%	21.3%
Divorced, widowed, separated	12.9%	14.4%	13.1%
Ethnicity			
White	93.5%	77.4%	91.2%
Black/African American	4.1%	14.7%	5.0%
American Indian, Aleut Eskimo	0.1%	0.4%	0.1%
Asian or Pacific Islander	1.0%	3.3%	2.5%
Other	1.3%	4.2%	1.2%
Average Household Size	2.8 persons	2.8 persons	2.7 persons

2016 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, Atlanta is the primary market for the Mountain Region. In recent years, the coastal and mountain areas have seen more of a diversification of markets.

Coastal Region
Raleigh-Durham-Fayetteville (14.6%)
Greenville-New Bern-Washington (8.9%)
Norfolk-Portsmouth-Newport News (8.0%)
Greensboro-High Point-Winston Salem (7.8%)
Richmond-Petersburg (6.6%)
Washington DC Metro (5.5%)
Charlotte (4.6%)
Augusta (3.6%)
Greenville-Spartanburg-Asheville (2.8%)
Miami-Ft. Lauderdale (2.8%)
Piedmont Region
Raleigh-Durham-Fayetteville (8.4%)
Charlotte (8.3%)
Greenville-Spartanburg-Asheville (7.3%)
Washington, DC (5.6%)
New York (5.3%)
Greenville-New Bern-Washington (4.9%)
Philadelphia (4.0%)
Greensboro-High Point-Winston Salem (3.9%)
Norfolk-Portsmouth-Newport News (3.1%)
Atlanta, GA (2.9%)
Mountain Region
Atlanta, GA (13.9%)
Greenville-Spartanburg-Asheville (13.6%)
Charlotte (11.0%)
Raleigh-Durham (Fayetteville) (10.5%)
Greensboro-High Point-Winston Salem (7.4%)
Myrtle Beach-Florence (2.7%)
Washington, DC (2.6%)
New York (2.6%)
Nashville (2.0%)
Richmond-Petersburg (1.9%)

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

2016 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.