

2017 North Carolina Visitor Profile

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



2017 North Carolina Visitor Profile

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, 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 report is to profile the average North Carolina visitor, both overnight visitors and daytrippers. The report also includes comparisons between out-of-state and resident visitors where applicable. At the end of the report, an appendix offers definitions of key travel terms.

2017 North Carolina Visitor Profile

Table of Contents

	Page
North Carolina Visitor Profile Summary	4
Overnight Visitor Profile Summary	5
Daytripper Visitor Profile Summary	28
Overnight/Daytripper Comparison	39
Glossary of Terms	47

2017 North Carolina Visitor Profile

Total Visitor Summary

- ◆ In 2017, approximately 46 million person-trips were taken in North Carolina and ranked #6 in the US in terms of domestic visitation.
- ◆ Eighty-eight percent of all domestic visitors came to North Carolina for pleasure purposes, while nine percent of visitors came to conduct business (includes meeting/convention). The remaining three percent indicated “other” reason for visiting the state.
- ◆ The summer (June - August) was the most popular season for travel to North Carolina, with nearly thirty percent of all 2017 visitors. Spring (March - May) followed with twenty-five percent of the annual visitors. The fall (September - November) season welcomed twenty-four percent of visitors and winter (December-February) saw twenty-one percent of visitors in 2017. July was the single largest month for travel to the state with ten (10.3%) percent, followed by June (9.8%) and August (9.6%).
- ◆ Forty-six percent of North Carolina overnight visitors lodged in a hotel/motel, while thirty-six percent stayed in a private home. More than seven percent stayed in a rental home or condo, while three percent stayed in a personal second home or condo. Three percent stayed in an RV park or campground and approximately three percent of overnight visitors indicated that they stayed in a shared economy property such as an AirBnB or VRBO.
- ◆ The average travel party size for all North Carolina visitor parties was 2.1. Twenty-five percent of travel parties to the state included children in the party.
- ◆ Ninety percent of all travelers to the state drove (includes personal automobile, rental, motorcycle and RV), while seven percent traveled by air.
- ◆ In 2017, the average household trip expenditure by visitors to North Carolina was \$600. The average trip expenditure for overnight visitors was \$738. Daytrip parties to the state spent approximately \$215 per visit.
- ◆ The top states of origin of *total* visitors to North Carolina were in-state residents (48.7%), Virginia (7.2%), South Carolina (7.0%), Georgia (5.7%), Florida (4.1%), Tennessee (3.3%), New York (3.0%), Ohio (2.4%), Maryland (2.1%) and Pennsylvania (2.0%).
- ◆ Thirty-five percent of the households that traveled to North Carolina in 2017 had a household income over \$100,000. The average household income for all visitors was \$84,640.
- ◆ In 2017, Raleigh/Durham/Fayetteville (14.1%) was the top advertising market of origin for *all* travelers to the state, followed by Charlotte (12.6%), Greensboro/High Point/Winston Salem (7.8%), Greenville-Spartanburg-Asheville (6.1%), Atlanta (5.1%), Greenville-New Bern-Washington (4.4%), Norfolk-Portsmouth-Newport News (3.7%), Washington, DC (3.1%), Wilmington (2.5%), New York (2.4%) and Philadelphia (1.9%).

2017 North Carolina Overnight Visitor Profile

Summary

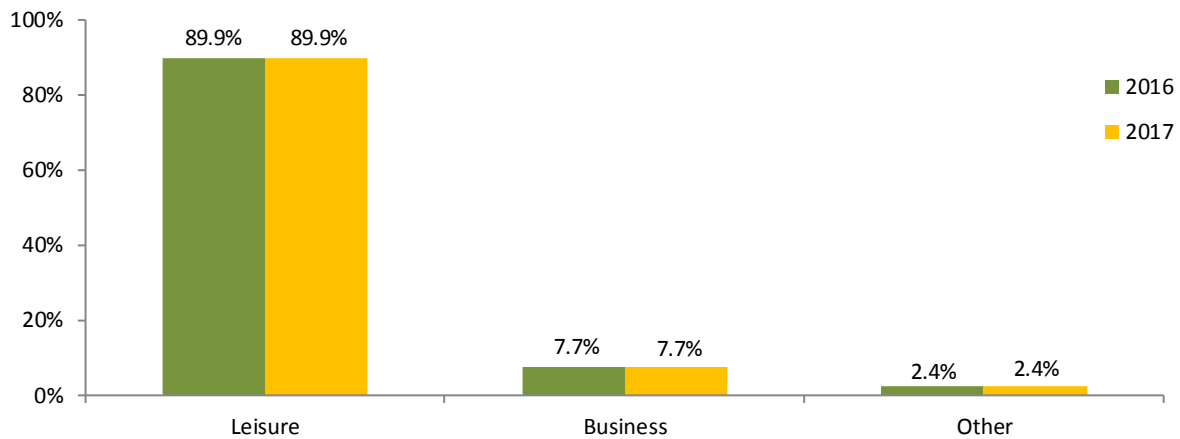
- ◆ In 2017, approximately 37 million overnight person-trips were taken in North Carolina. North Carolina ranked #7 in the US in terms of domestic overnight visitation.
- ◆ Ninety percent of all domestic overnight visitors came to North Carolina for leisure purposes, while eight percent of visitors came to conduct business (includes meeting/convention). The remaining two percent indicated “other” reason for visiting the state.
- ◆ The summer (June-August) was the most popular season for overnight travel to the state, with thirty-one percent of all overnights. Spring (March-May) followed with twenty-five percent of visitors. The fall (September-November) and winter (December-February) seasons saw twenty-four percent and twenty percent of annual visitors respectively. July was the largest month for overnight travel to the state with eleven percent, followed by June and August, each with ten percent of overnight visitors.
- ◆ Overnight visitors to North Carolina spent an average of 3.4 nights in the state in 2017. This was slightly down from 3.7 nights in 2016.
- ◆ Forty-six percent of North Carolina overnight visitors lodged in a hotel/motel, while thirty-six percent stayed in a private home. More than seven percent stayed in a rental home or condo, while three percent stayed in a personal second home or condo. Three percent stayed in an RV park or campground and approximately three percent of overnight visitors indicated that they stayed in a shared economy property such as an AirBnB or VRBO.
- ◆ The average travel party size for all overnight North Carolina visitor parties was 2.1 people. Twenty-six percent of overnight travel parties to the state included children in the party.
- ◆ Eighty-eight percent of overnight travelers to the state drove (includes personal automobile, rental, motorcycle and RV), while nine percent traveled by air.
- ◆ In 2017, the average household trip expenditure for overnight visitors was \$738. Resident overnight visitors spent an average of \$467 and out-of-state overnight visitors spent an average of \$903.
- ◆ The top states of origin of *overnight* visitors to North Carolina were in-state residents (38.9%), Virginia (8.4%), South Carolina (7.2%), Georgia (6.3%), Florida (5.3%), New York (3.9%), Tennessee (3.3%), Ohio (2.9%), Maryland (2.7%) and Pennsylvania (2.6%).
- ◆ Just over half (53.8%) of the households that traveled overnight to North Carolina in 2017 had a household income over \$75,000, and more than a third (38.4%) of them had an income of over \$100,000. The average annual income of overnight visitors to the state was \$88,620.
- ◆ In 2017, Raleigh/Durham/Fayetteville (12.6%) was the top advertising market of origin for *overnight* travelers to the state, followed by Charlotte (10.7%), Greensboro/High Point/Winston Salem (6.6%), Atlanta (5.7%), Greenville-Spartanburg-Asheville (4.0%), Washington, DC (3.8%), Norfolk-Portsmouth-Newport News (3.7%), New York (2.9%), Greenville-New Bern-Washington (2.7%) and Wilmington (2.4%).

North Carolina Overnight Visitor Profile

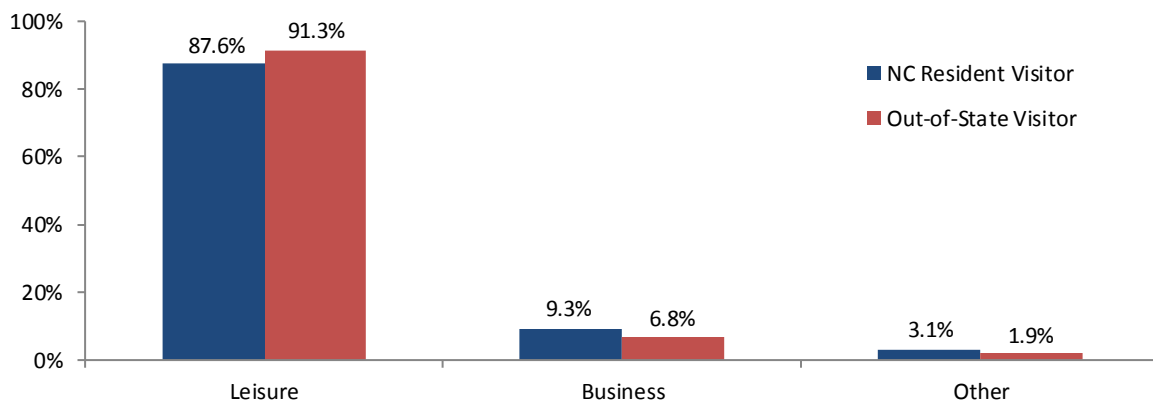
Main Purpose of Visit

In 2017, nearly nine out of ten (89.9%) of domestic overnight visitors came to North Carolina for leisure purposes, which included visiting friends and relatives, outdoor recreation and entertainment/sightseeing. Nearly eight percent (7.7%) of overnight visitors came for general business, convention, seminar or other group meeting, while less than three percent traveled to the state for “other” reasons. While North Carolina has a strong history of being a leisure travel state, the leisure proportion has increased from eighty-one percent in 2014 to nearly ninety percent in 2017.

Primary Purpose of Overnight Trip to North Carolina



**2017 Primary Purpose of Overnight Trip
NC Resident Vs. Out-of-State Visitor**

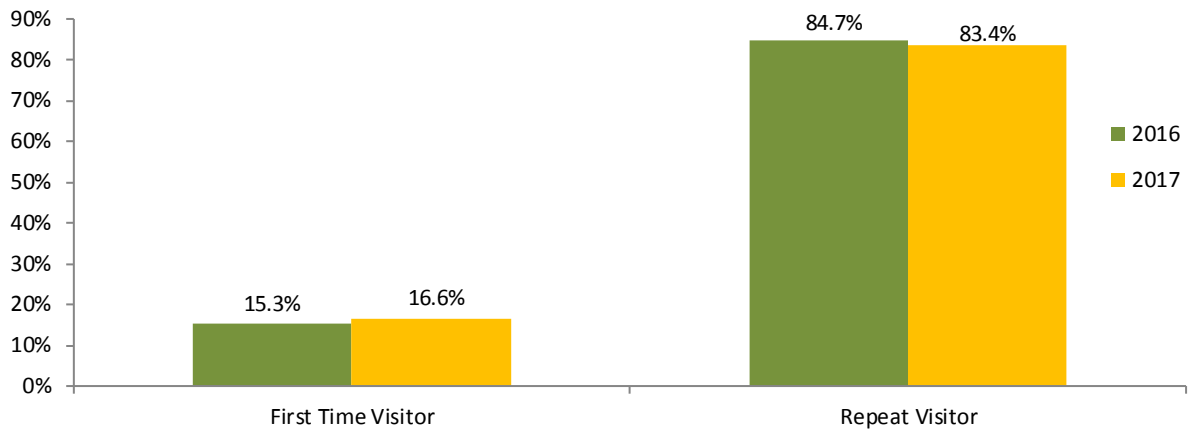


While both groups are primarily leisure visitors, out-of-state travelers to North Carolina are more likely to be leisure visitors than resident overnight visitors. More than ninety-one percent of out-of-state overnight travelers to North Carolina in 2017 were leisure visitors while nearly eighty-eight percent of resident visitors were leisure visitors. Nearly seven percent of out-of-state visitors in 2017 indicated that their primary purpose of visit was business, while nine percent of resident visitors were traveling in the state for business.

First Time Visitors

In 2017, more than sixteen percent of out-of-state overnight visitors were first time visitors to the state, a slight increase from 2016. More than half (58.2%) have visited more than three times in the last 5 years.

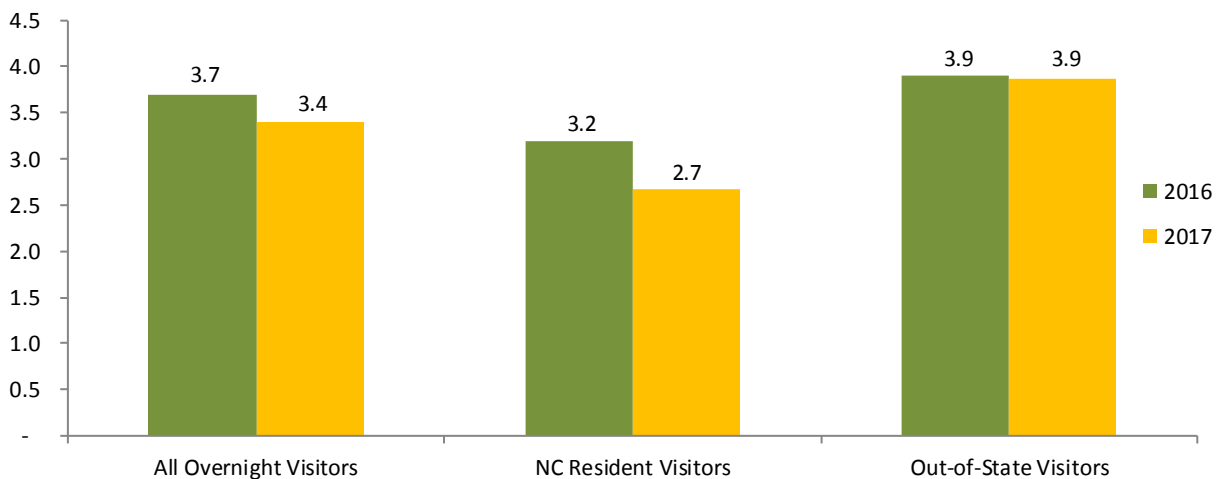
2017 First Time Out-of-State Overnight Visitors to North Carolina



Average Length of Stay

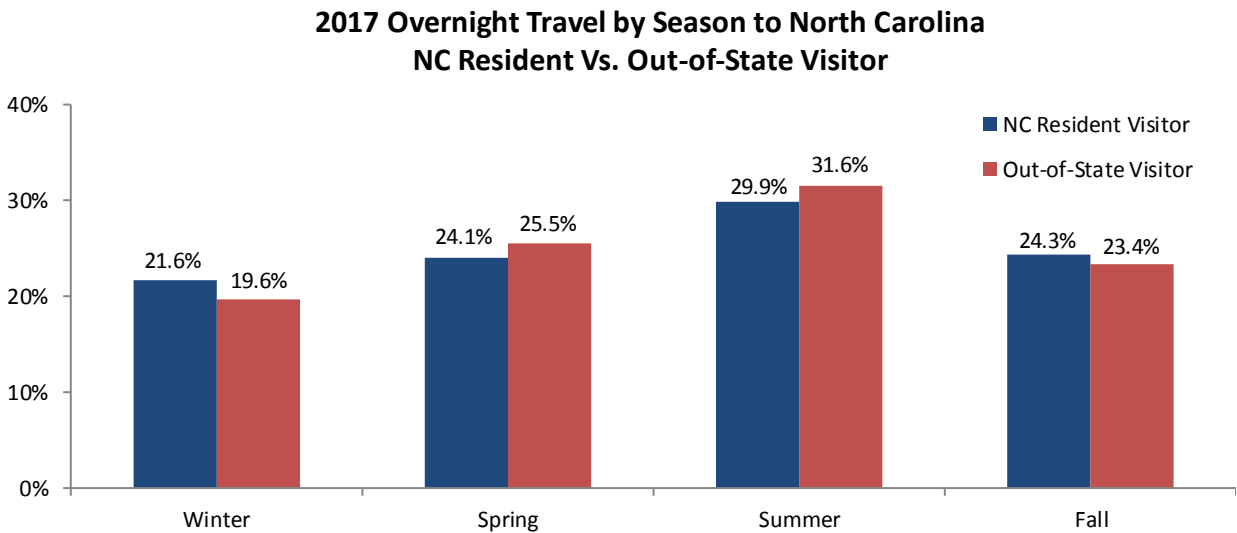
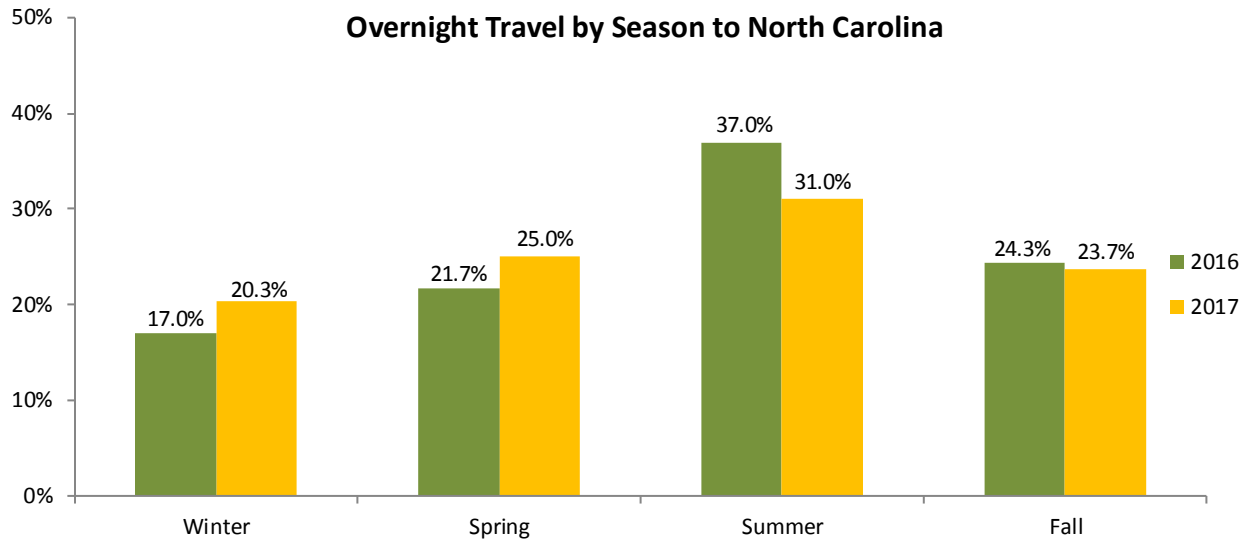
The average length of stay for all North Carolina visitors decreased seven percent from 2016 to 2017, the decrease coming from in-state resident visitors (down from 3.2 nights in 2016). Out-of-state visitors' length of stay in 2017 was the same as in 2016 (3.9 nights).

Average Length of Stay for Overnight Visitors to North Carolina



Travel Volume by Season

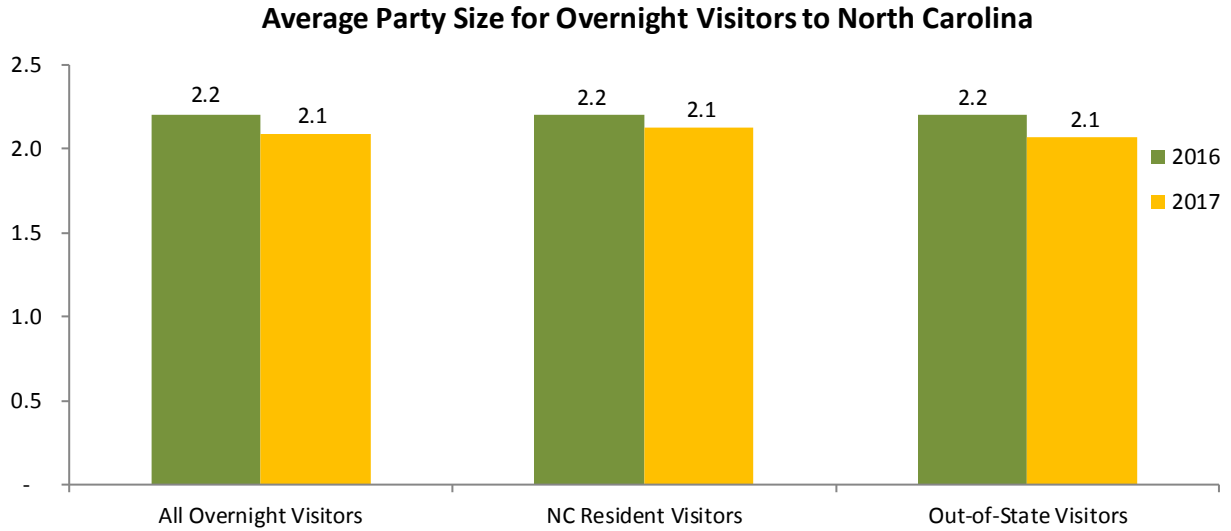
When examining overnight visitation based on the typical seasonal schedule, the summer (June through August) with thirty-one percent was the most popular season for overnight travel to North Carolina. Spring (March through May) was the next most popular travel season (25%) for overnighters, followed by fall (September through November) with nearly twenty-four percent and winter (December through February) with twenty percent of overnight visitors.



Summer was the most popular season for both resident and out-of-state overnight visitors to the state. Fall and spring represented similar proportions of resident and out-of-state travelers to North Carolina. Resident travelers are slightly more likely to travel during the winter season in North Carolina than out-of-state travelers.

Travel Party Size

The average travel party size for North Carolina overnight visitor parties was down slightly from 2016 to 2017, with an average of 2.1 persons per travel party. The average party size for resident travelers and out-of-state visitors was the same.

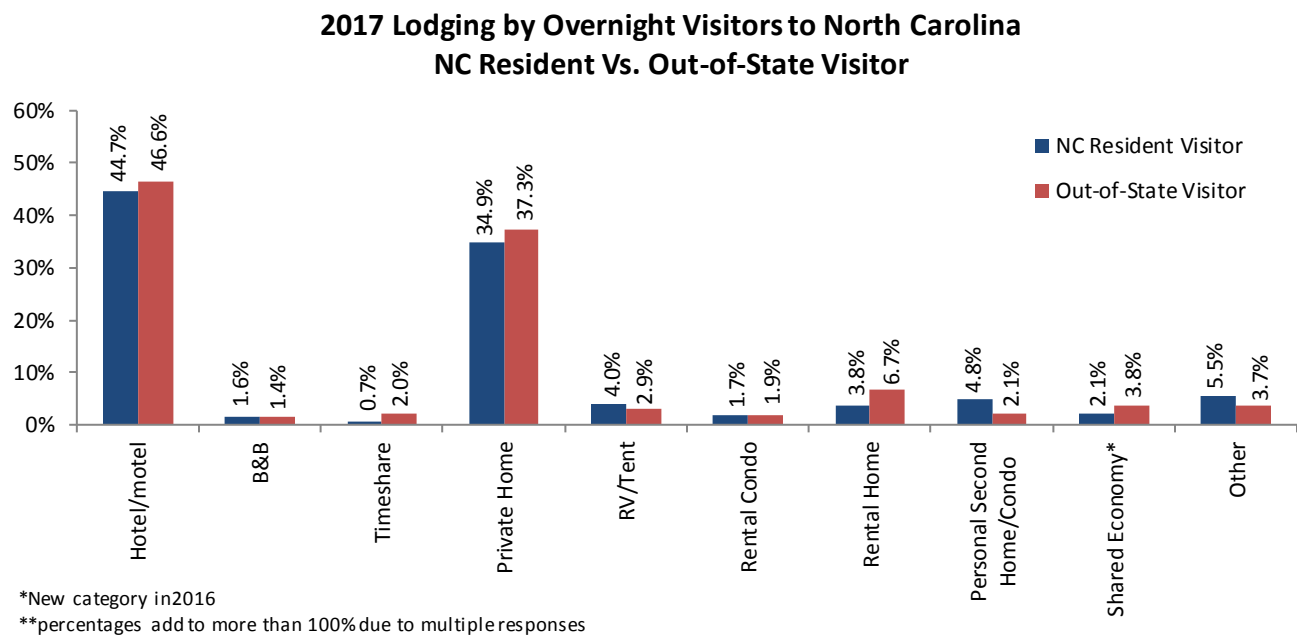
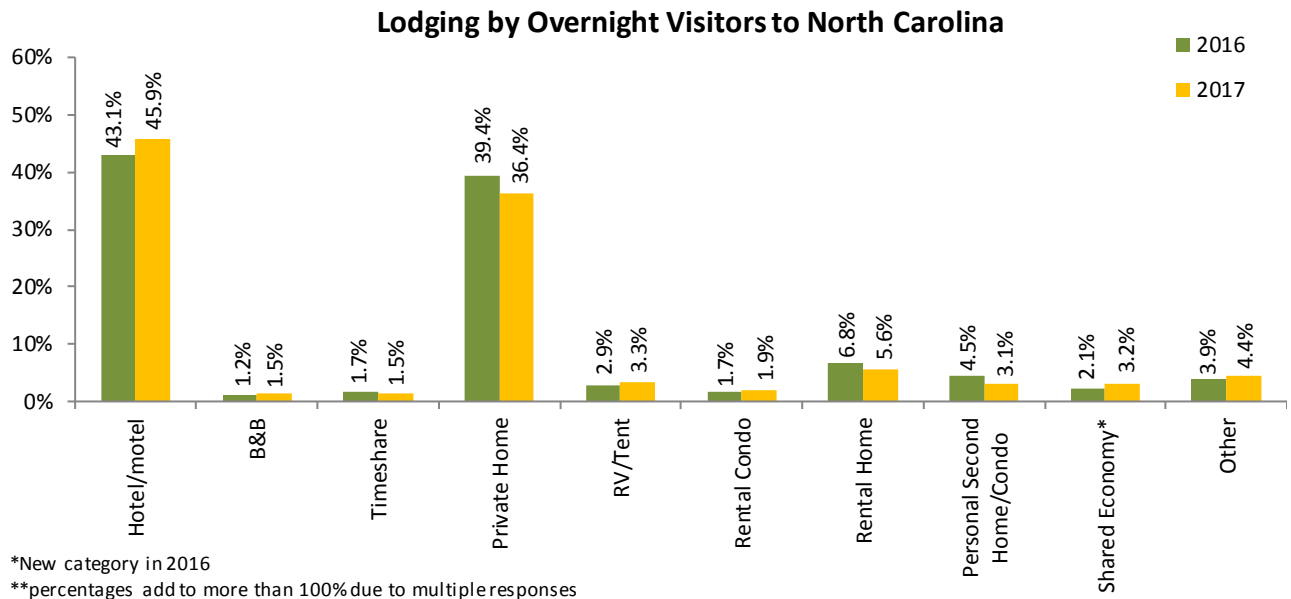


Children on Trip

Twenty-six percent of all overnight visitor parties to North Carolina included children. The average number of children on trips was 1.8. Resident visitor parties are more likely to include children than out-of-state visitor parties (31% vs. 23%).

Lodging Used in North Carolina

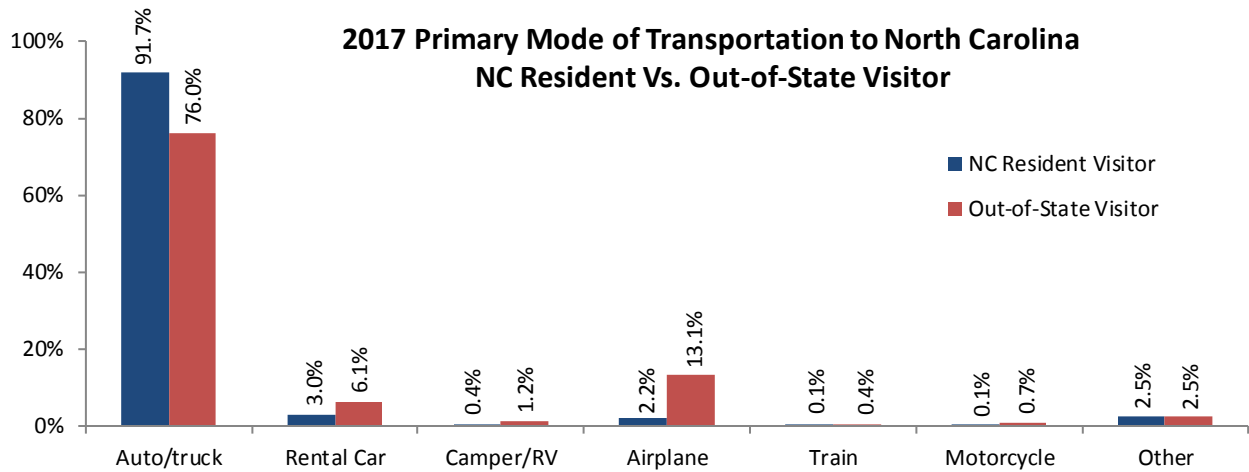
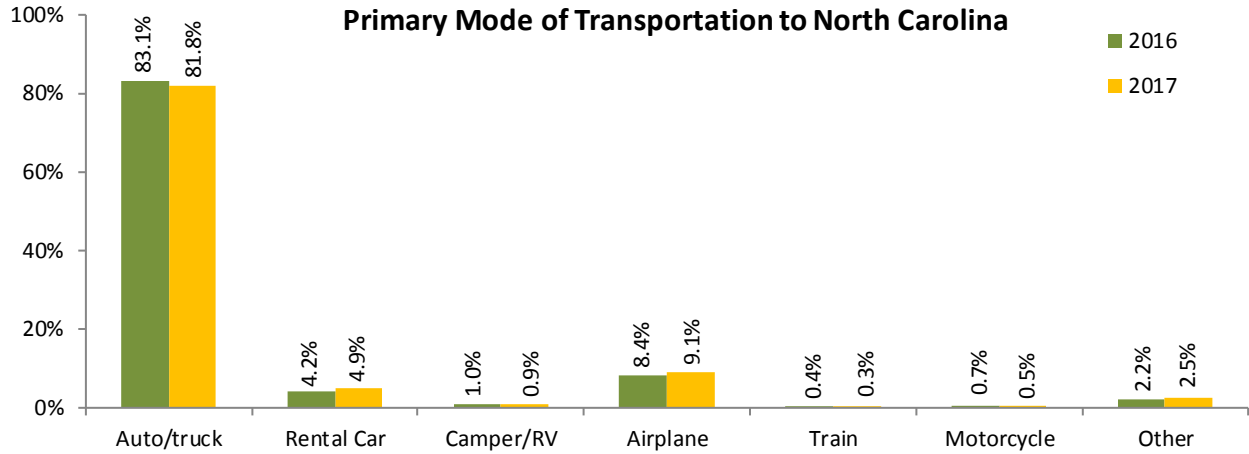
In 2017, forty-six percent of North Carolina visitors lodged in a hotel/motel, up from forty-three percent in 2016. Thirty-six percent stayed in a private home, down slightly from 2016. Other categories of accommodations showed little change from 2016. With the increase in shared economy lodging properties, a new category of lodging was added in 2016. Three percent of North Carolina overnight visitors indicated that they used some type of shared economy lodging while in the state, up from two percent in 2016.



Out-of-state visitors are only slightly more likely to use a hotel/motel and rental homes as accommodations than resident visitors, but are also more likely to stay in a private home while visiting the state. Resident visitors are more likely to stay in an RV park/campground or personal second home than out-of-state visitors.

Mode of Transportation

The primary mode of transportation by overnight visitors to North Carolina has remained consistent with the personal auto being the dominant form of transportation (81.8%), while about nine percent travel by air.

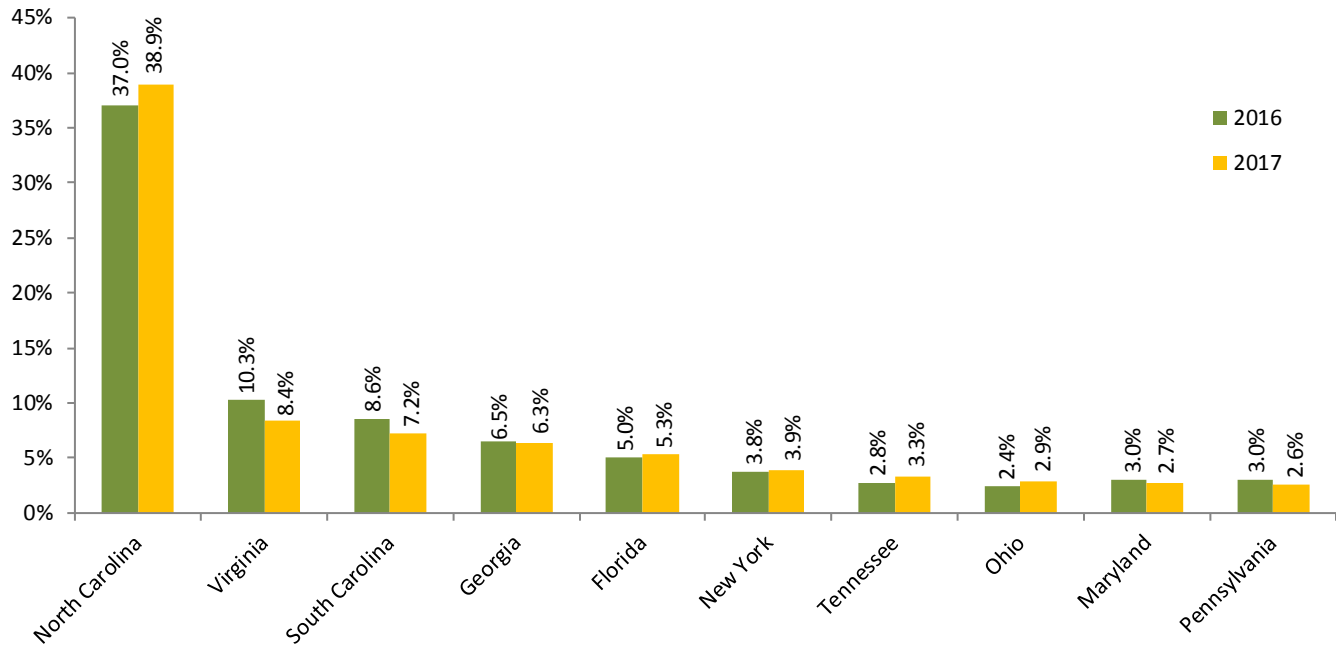


Not surprisingly, NC resident visitors are more likely to use their own automobile as primary transportation for overnight travel within the state than out-of-state visitors. While out-of-state visitors also primarily drive to North Carolina, they are more likely to fly than resident visitors.

Origin of Visitors

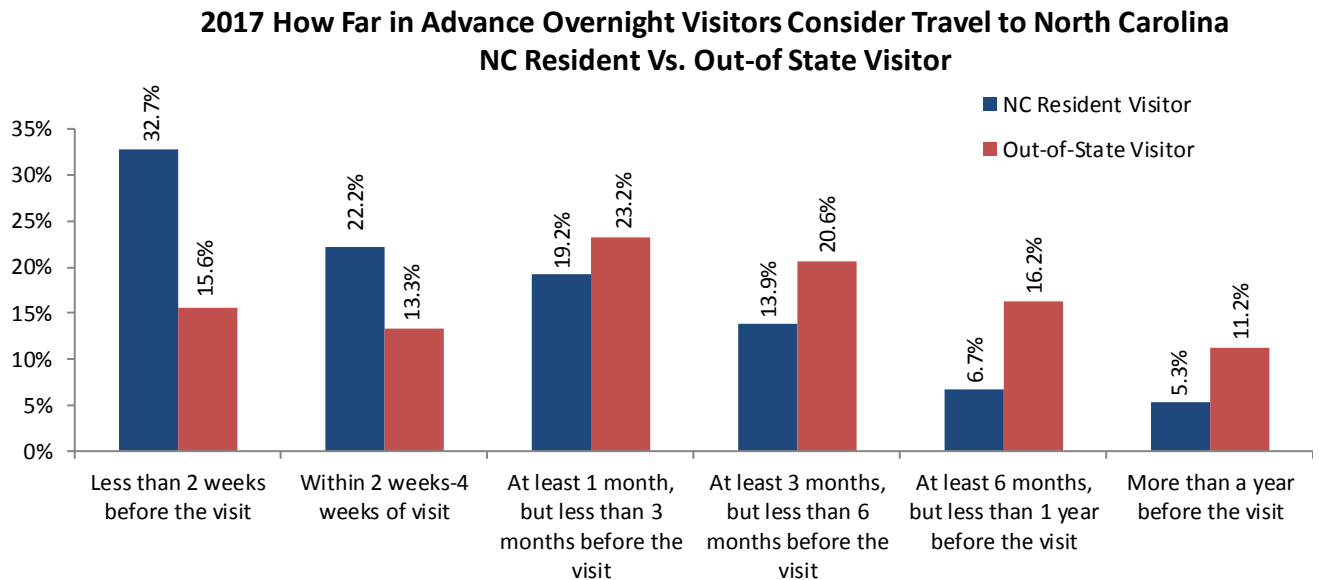
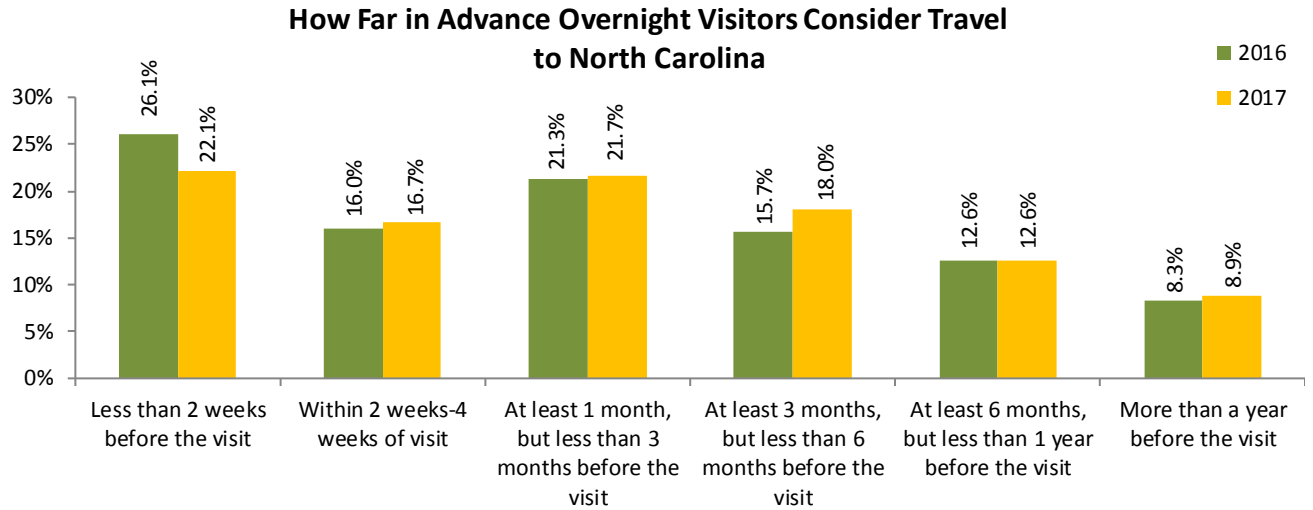
In 2017, the top states of origin for North Carolina overnight visitors included North Carolina (38.9%), Virginia (8.4%), South Carolina (7.2%), Georgia (6.3%), Florida (5.3%) and New York (3.9%). Visitation share from Virginia decreased from ten percent in 2016 to eight percent in 2017. The top ten out-of-state markets represent forty-five percent of North Carolina overnight visitors.

Top States of Origin of Overnight Visitors to North Carolina



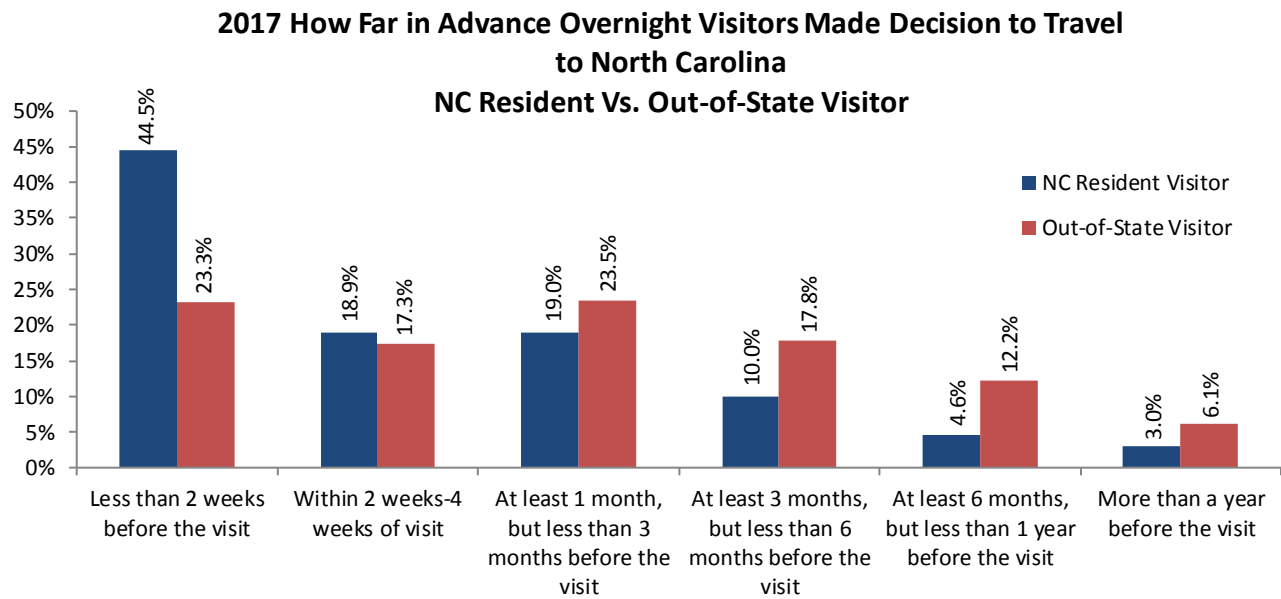
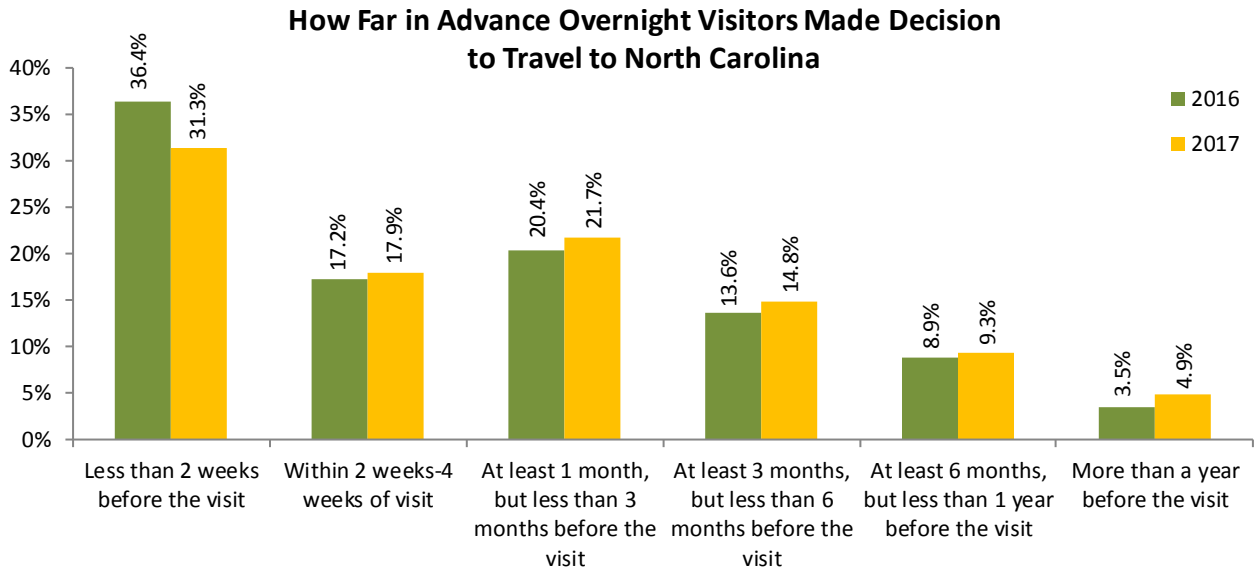
Trip Planning

More than twenty percent (21.5%) of 2017 overnight visitors considered North Carolina for a visit at least six months before the visit and nine percent considered the state more than a year before visiting. Consideration time for travel to the state appears to have lengthened slightly in 2017. Nearly forty percent of North Carolina overnight visitors considered the state more than three months prior to travel in 2017, while nearly thirty-seven percent did so in 2016.



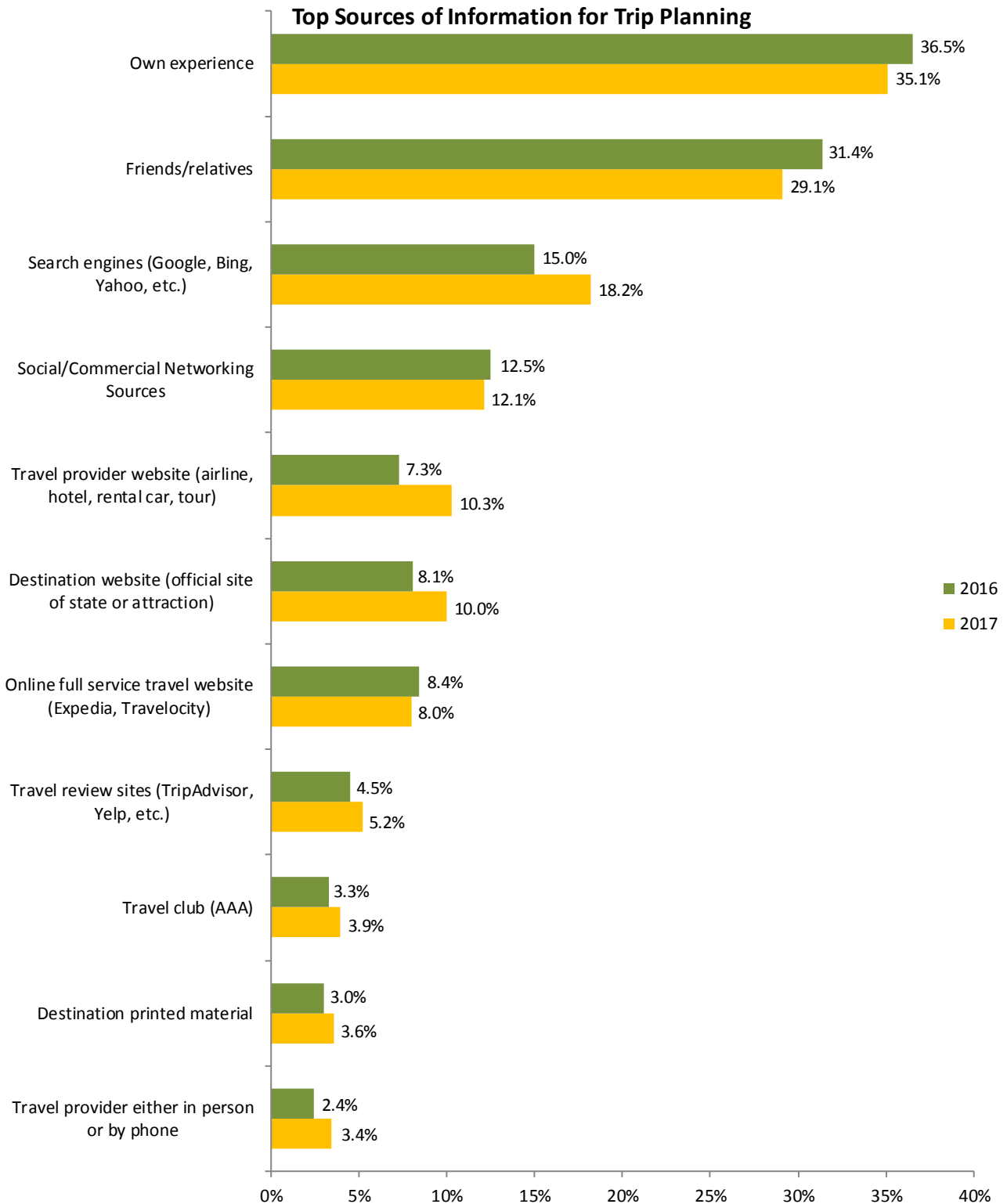
Resident visitors are twice as likely to have North Carolina in the “consideration” set less than two weeks before visiting as out-of-state visitors. Out-of-state visitors are more likely to consider the state at least one month prior to travel and more than twice as likely to consider North Carolina more than six months prior to travel.

Just over fourteen percent of overnight visitors made the decision to visit the state at least six months prior to the visit, while more than thirty-one percent of overnight visitors made the decision within two weeks of visiting.

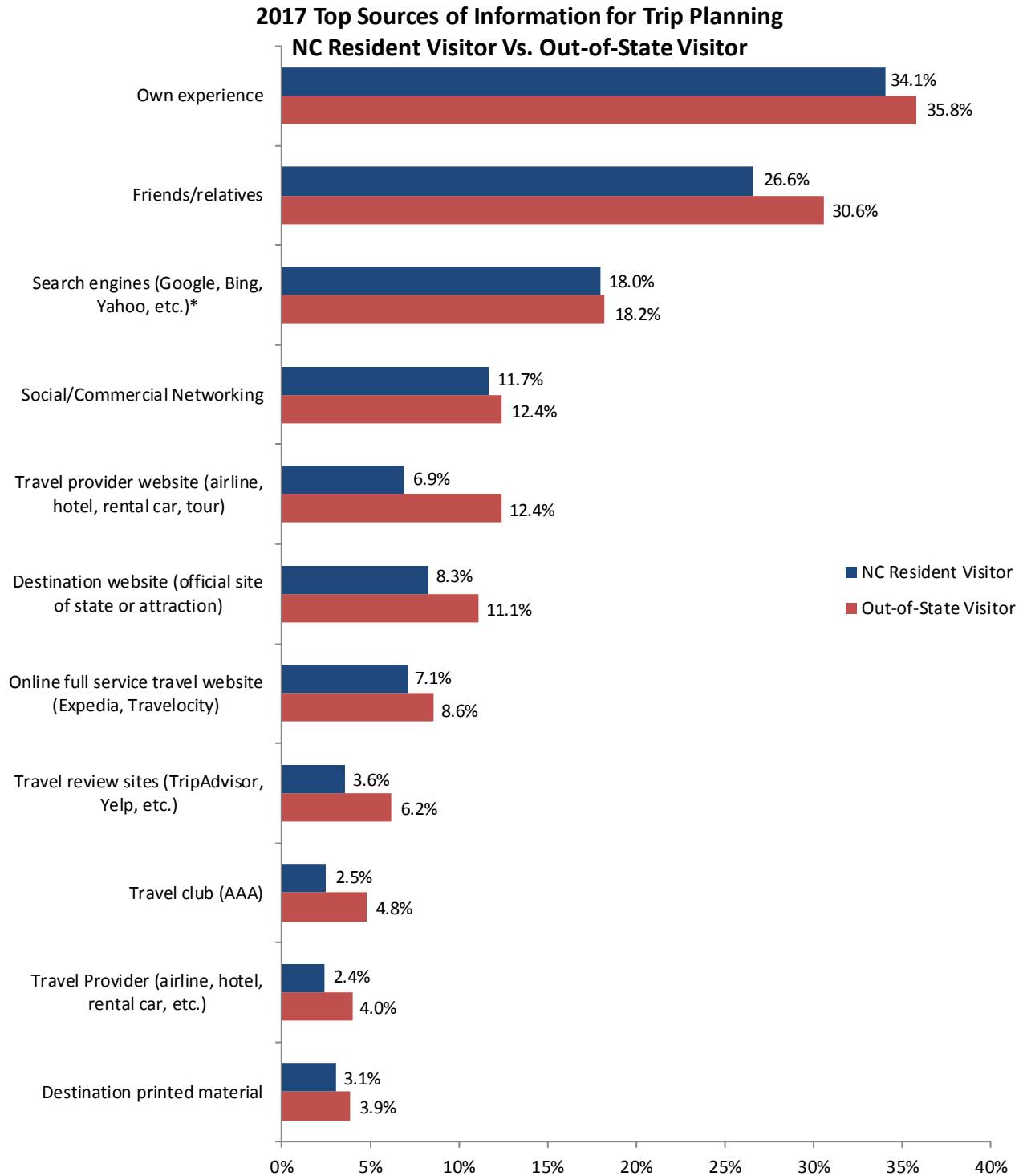


Resident visitors are nearly twice as likely to make the decision to visit North Carolina within two weeks of travel than out-of-state visitors. Thirty-six percent of out-of-state visitors decide to visit at least three months prior to visit, while eighteen percent of resident visitors decide to visit at least three months prior to travel.

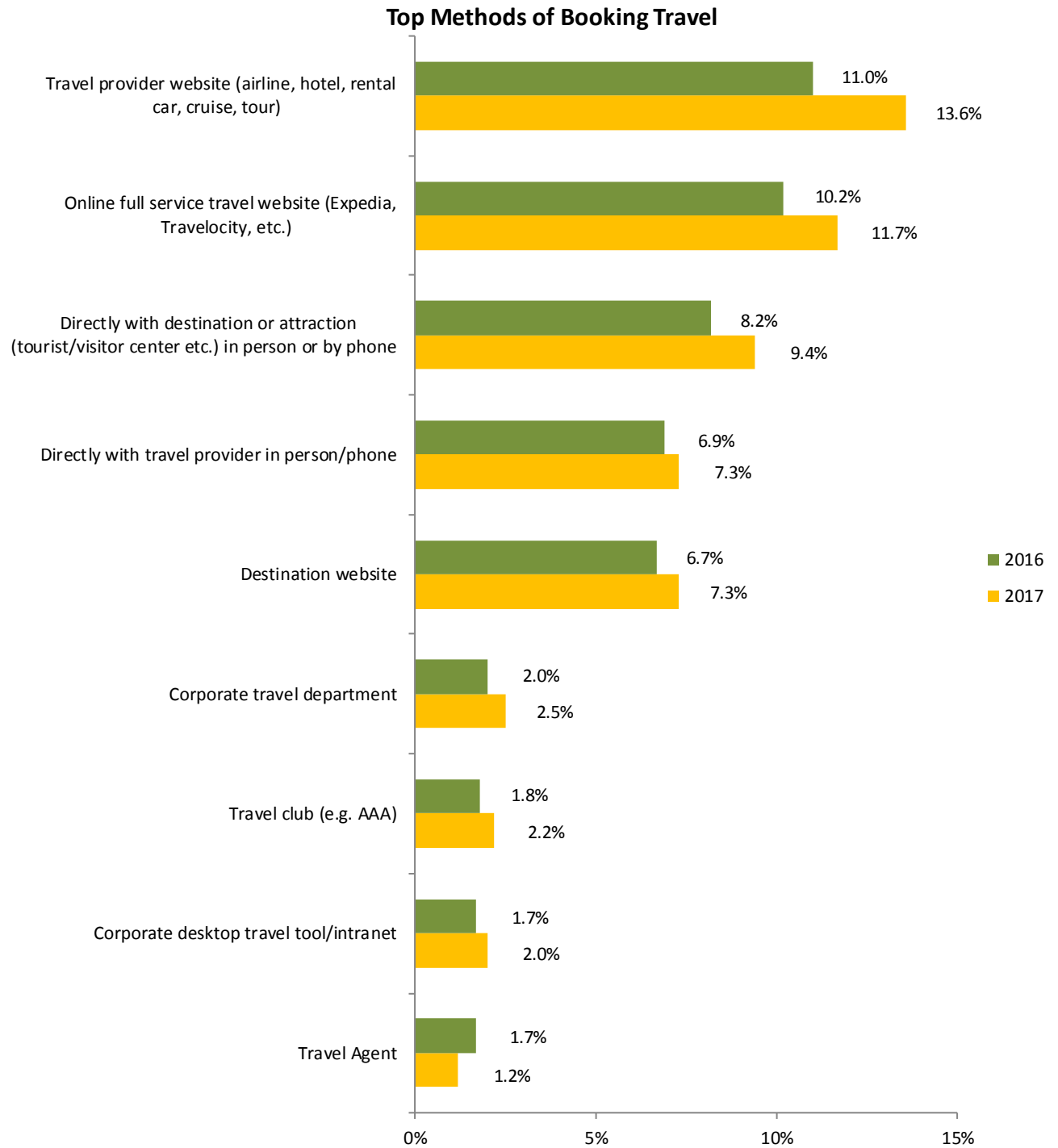
The largest proportion of overnight visitors to North Carolina used their own experience, friends/relatives, search engines and social networking to plan their trips. The proportions of visitors who used search engines, travel provider websites and destination websites increased from 2016 to 2017.



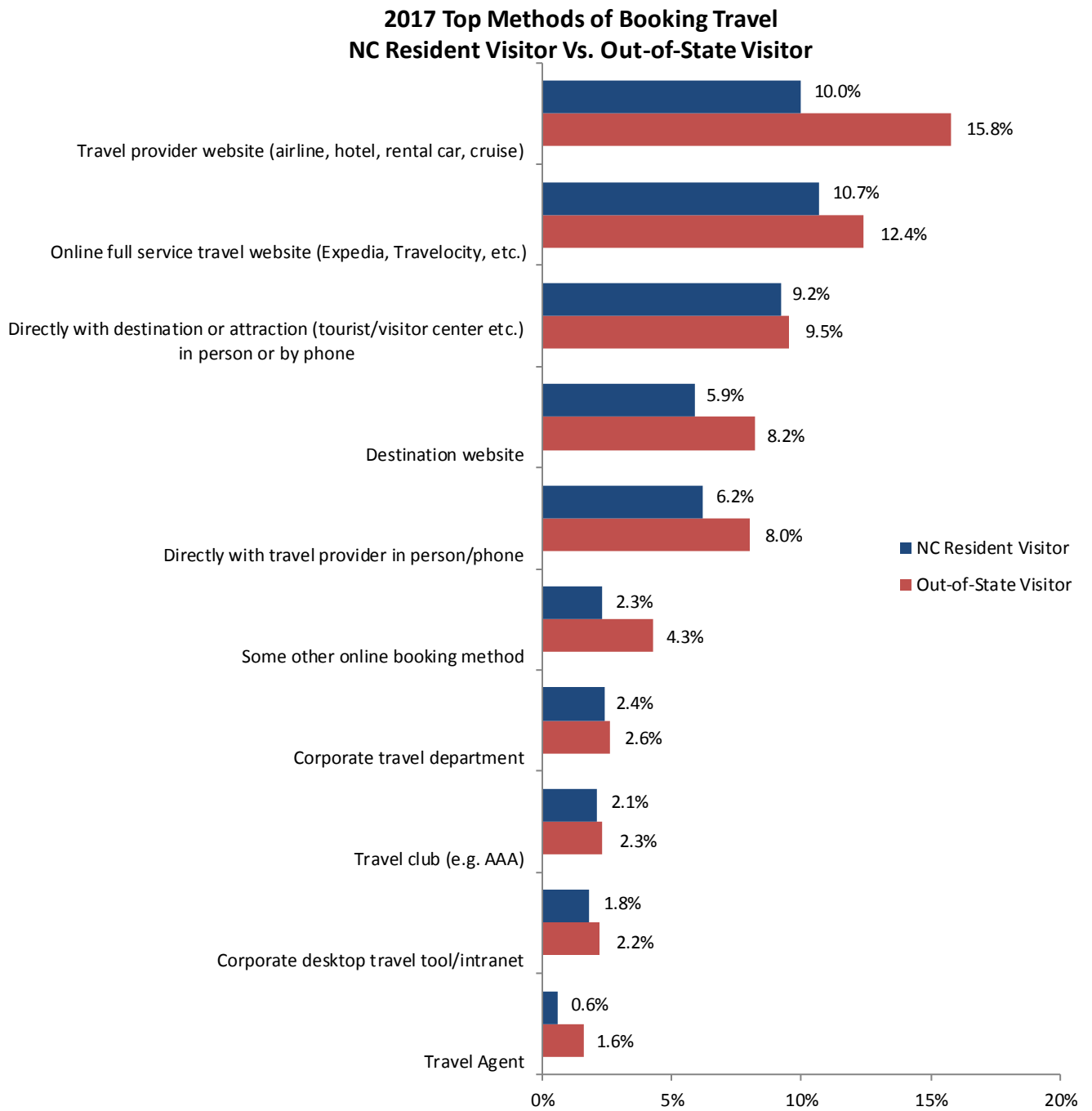
Out-of-state visitors tend to use more sources of information overall than resident visitors. In particular, they are more likely to rely on friends/relatives and travel provider and destination websites than resident visitors to North Carolina.



The proportion of overnight visitors booking travel through travel provider websites increased from 2016 to 2017. Other top methods of booking travel continue to be full service travel websites, directly with destination or travel provider and destination websites.

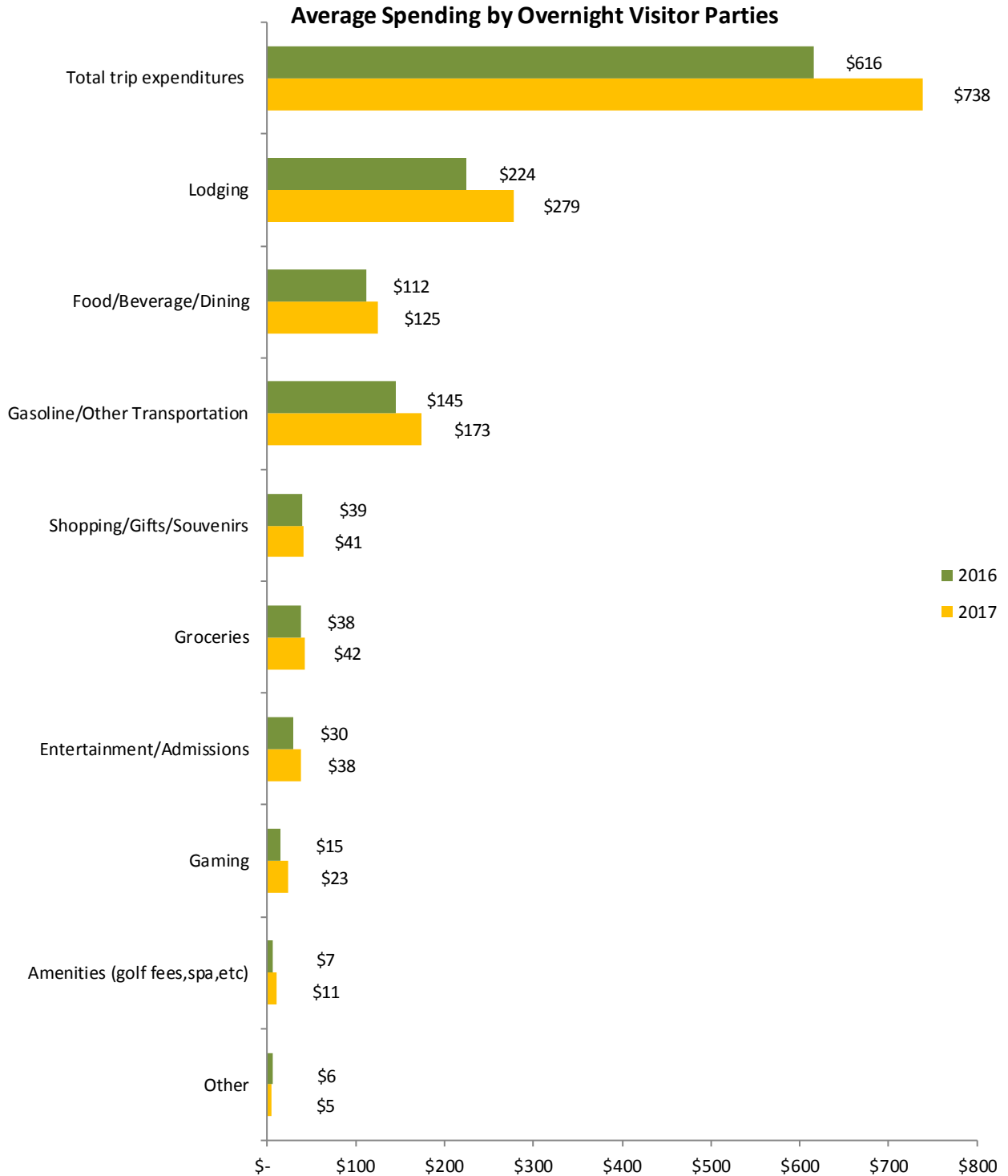


Out-of-state visitors are much more likely to use travel provider websites, full service online travel websites and by directly contacting travel providers than resident travelers.

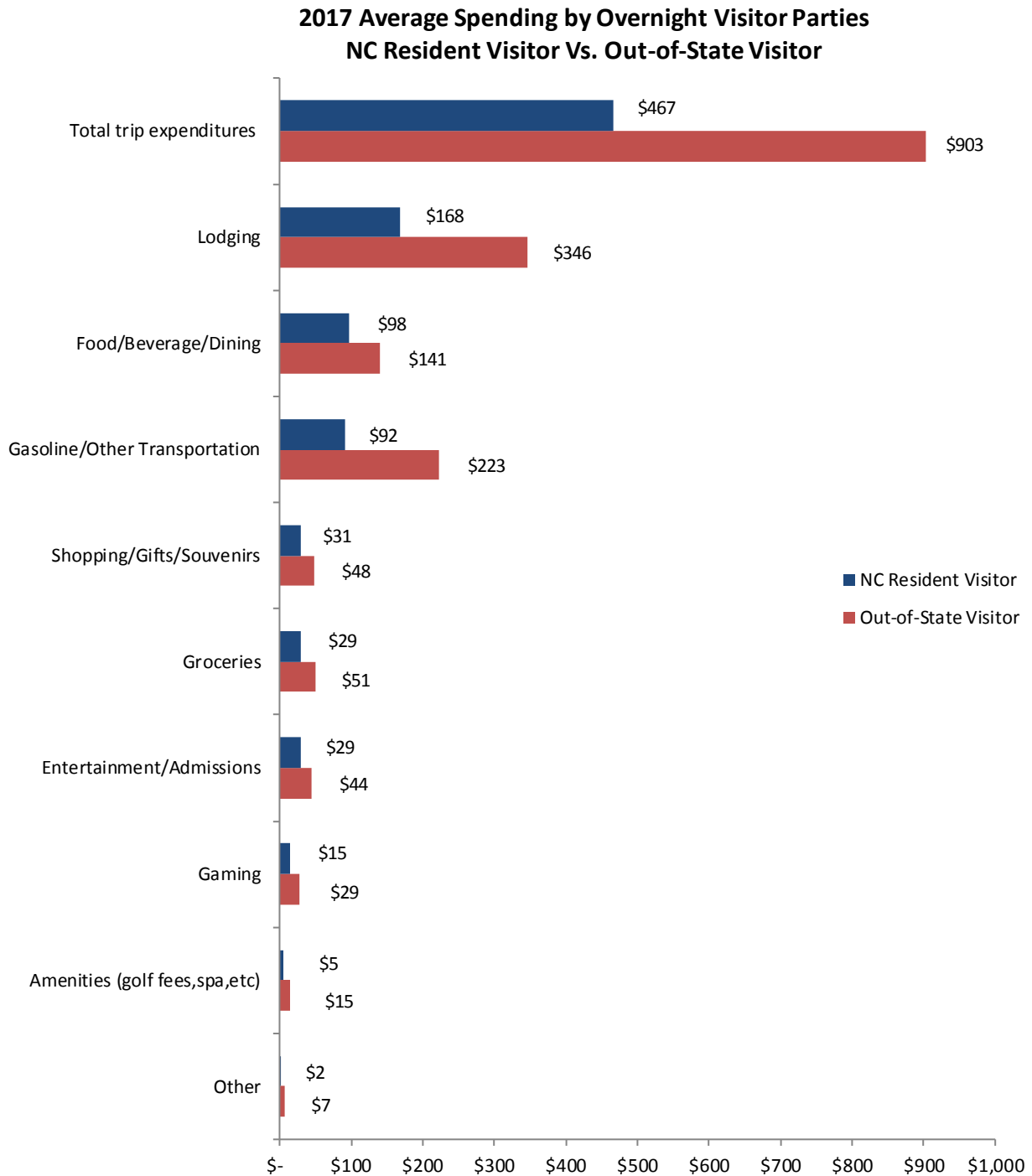


Expenditures by North Carolina Visitors

The average overnight visitor party spending in the state was \$738, up from \$616 in 2016. Spending in all categories increased, particularly the categories of lodging, food/dining and transportation.



Out-of-state visitors to North Carolina spend sixty-three percent more on average per trip than resident visitors, particularly in the categories of lodging, gasoline/transportation and food/beverage.



Activities

Nearly one-third (31%) of 2017 overnight visitors to North Carolina spent time with relatives while in the state. More than one-fourth shopped (26%) and fifteen percent visited friends while traveling overnight in North Carolina. Activities that showed largest increases in the proportion of overnight visitors participating from 2016 to 2017 included rural sightseeing (+3 percentage points), visiting a state park or national park (+2 percentage points), museums (+2 percentage points), and gardens (+2 percentage points). ****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					
Activity	2016	2017	Activity	2016	2017
Visiting Relatives	31%	31%	Golf	2%	3%
Shopping	27%	26%	Sport Event- Youth/Amateur/Collegiate/Other(Spectator)	2%	2%
Visiting Friends	17%	15%	Biking/Road Biking/Cycling	2%	2%
Beach	14%	15%	Bird Watching	2%	2%
Rural Sightseeing	12%	15%	Theme Park/Amusement Park/Water Park	2%	2%
Fine Dining	14%	13%	Spa/Health Club	1%	2%
Historic Sites/Churches	10%	11%	Rafting/Kayaking/Canoeing/Paddleboarding	1%	2%
State Park/Monument/Recreation area	8%	10%	Horseback riding	2%	1%
Museums	7%	9%	Native American ruins/Rock art	2%	1%
Urban Sightseeing	9%	8%	Theater/Drama	3%	1%
Hiking/Backpacking	6%	7%	Motorboat/Jet ski	1%	1%
Wildlife Viewing	6%	7%	Symphony/opera/concert	1%	1%
Craft Breweries	6%	6%	Farms/Ranches/Agri-tours	2%	1%
National Park/Monument/Recreation area	4%	6%	Sports events – Major/Professional	1%	1%
Gardens	3%	5%	Sport Event- Youth/Amateur/Collegiate/Other(Participant)	1%	1%
Fishing	6%	5%	Area where a TV show or movie was filmed	1%	1%
Old Homes/Mansions	5%	5%	Motor Sports	1%	1%
Wine Tasting/Winery Tour	5%	4%	Rock/Mountain climbing	1%	1%
Casino/Gaming	4%	4%	Distilleries	1%	1%
Local/folk arts/crafts	4%	4%	Mountain Biking	1%	1%
Other nature (photography, rockhounding, etc.)	4%	3%	Musical Theater	<1%	1%
Nightclubs/Dancing	4%	3%	ATV/Four-wheeling	<1%	1%
Nature Travel/Eco-touring	2%	3%	Skiing/snowboarding	<1%	1%
Special Events/Festivals	3%	3%	Water skiing	<1%	1%
Musical performance/show	3%	3%	Sailing	1%	<1%
Zoos/Aquariums/Aviaries	3%	3%	Rodeo/State Fair	<1%	<1%
Art Galleries	3%	3%	Scuba diving/snorkeling	<1%	<1%

Resident and out-of-state visitors behave similarly with regards to activities participated in while traveling to and within North Carolina. A somewhat larger proportion of out-of-state visitors are likely to visit with relatives while traveling to the state, participate in fine dining, visit historic sites/churches and go urban sightseeing than resident visitors.

Activities Participated in by 2017 Overnight Visitors to North Carolina					
NC Resident Vs. Out-of-State Visitors					
Activity	NC Resident	Out-of-State Visitor	Activity	NC Resident	Out-of-State Visitor
Visiting Relatives	27%	34%	Rafting/Kayaking/Canoeing/Paddleboarding	2%	3%
Shopping	27%	25%	Theme Park/Amusement Park/Water Park	2%	2%
Visiting Friends	13%	16%	Bird Watching	2%	2%
Rural Sightseeing	15%	16%	Biking/Road Biking/Cycling	2%	2%
Fine Dining	11%	15%	Motorboat/Jet ski	1%	2%
Beach	13%	15%	Horseback riding	1%	1%
Historic Sites/Churches	9%	12%	Theater/Drama	2%	1%
Urban Sightseeing	8%	10%	Native American ruins/Rock art	1%	1%
State Park/Monument/Recreation area	8%	10%	Sport Event-Youth/Amateur/Collegiate/Other (Participant)	1%	1%
Museums	9%	10%	Motor Sports	1%	1%
Hiking/Backpacking	7%	7%	Spa/Health Club	1%	1%
Wildlife Viewing	6%	7%	Farms/Ranches/Agri-tours	1%	1%
National Park/Monument/Recreation area	6%	7%	Area where a TV show or movie was filmed	1%	1%
Craft Breweries	5%	7%	Rock/Mountain climbing	1%	1%
Gardens	4%	6%	Sports events – Major/Professional	2%	1%
Fishing	4%	5%	Musical Theater	1%	1%
Old Homes/Mansions	5%	5%	Symphony/opera/concert	1%	1%
Wine Tasting/Winery Tour	4%	5%	Mountain biking	<1%	1%
Casino/Gaming	4%	5%	ATV/Four-wheeling	<1%	1%
Local/folk arts/crafts	3%	4%	Distilleries	<1%	1%
Art Galleries	3%	4%	Hunting	1%	1%
Nature Travel/Eco-touring	3%	4%	Caverns	1%	1%
Other nature (photography, rockhounding, etc.)	3%	3%	Hang gliding/skydiving/base jumping	<1%	1%
Nightclubs/Dancing	3%	3%	Skiing/snowboarding	<1%	<1%
Musical performance/show	3%	3%	Sailing	<1%	<1%
Golf	2%	3%	Horseracing	<1%	<1%
Zoos/Aquariums/Aviaries	3%	3%	Rodeo/State Fair	<1%	<1%
Special Events/Festivals	3%	3%	High School/College reunion	<1%	<1%
Sport Event-Youth/Amateur/Collegiate/Other(Spectator)	3%	3%	Scuba diving/snorkeling	<1%	<1%

Demographic Profile of North Carolina Overnight Visitors

Nearly two-thirds (65.5%) of the overnight visitors to North Carolina are married and twelve percent of the region's visitors are divorced, widowed or separated. There are not significant differences in marital status between resident visitors and non-resident visitors.

The largest proportion of North Carolina overnight visitors, both resident and out-of-state, classify themselves as white (88%). More than six percent classify themselves as black/African American, down somewhat from ten percent in 2016. Three percent of overnight visitors self-report their ethnicity is Asian/Pacific Islander.

More than two-thirds (68.8%) of North Carolina overnight visitor parties have a household head with a college degree or higher. The average overnight visitor is 47 years old (no change from 2016). The NC resident overnight visitor is slightly younger (45 years old) than the out-of-state overnight visitor (48 years old). The average North Carolina overnight visitor has 16 vacation days each year.

The average household income of overnight visitors to North Carolina in 2016 was \$88,620, up slightly from \$87,140 in 2016. More than half of overnight visitors in 2017 reported a household income \$75,000 or more. Nearly twenty-one percent had a household income of over \$125,000. The average household income of resident overnight visitors was \$83,140 in 2017, while the average household income of out-of-state overnight visitors was \$91,820.

Sixty-two percent of overnight visitor parties reported that the head of household is employed, while twenty-three percent are retired. The remainder reported "not employed" as work status. Out-of-state visitors (26%) are more likely to be retired than resident visitors (18%).

The average household size of a North Carolina overnight visitor party in 2017 was 2.7.

2017 Top Advertising Markets

In 2017, the top advertising markets sending overnight visitors to **North Carolina** were Raleigh-Durham-Fayetteville (12.6%), Charlotte (10.7%), Greensboro-Winston-Salem-High Point (6.6%), Atlanta (5.7%), Greenville-Spartanburg-Asheville (4.0%), Washington DC (3.8%), Norfolk-Portsmouth-Newport News (3.7%), and New York (2.9%). Advertising markets correspond with Nielsen's Designated Market Areas (DMAs).

Top Advertising Markets of Origin for North Carolina *Overnight* Visitors

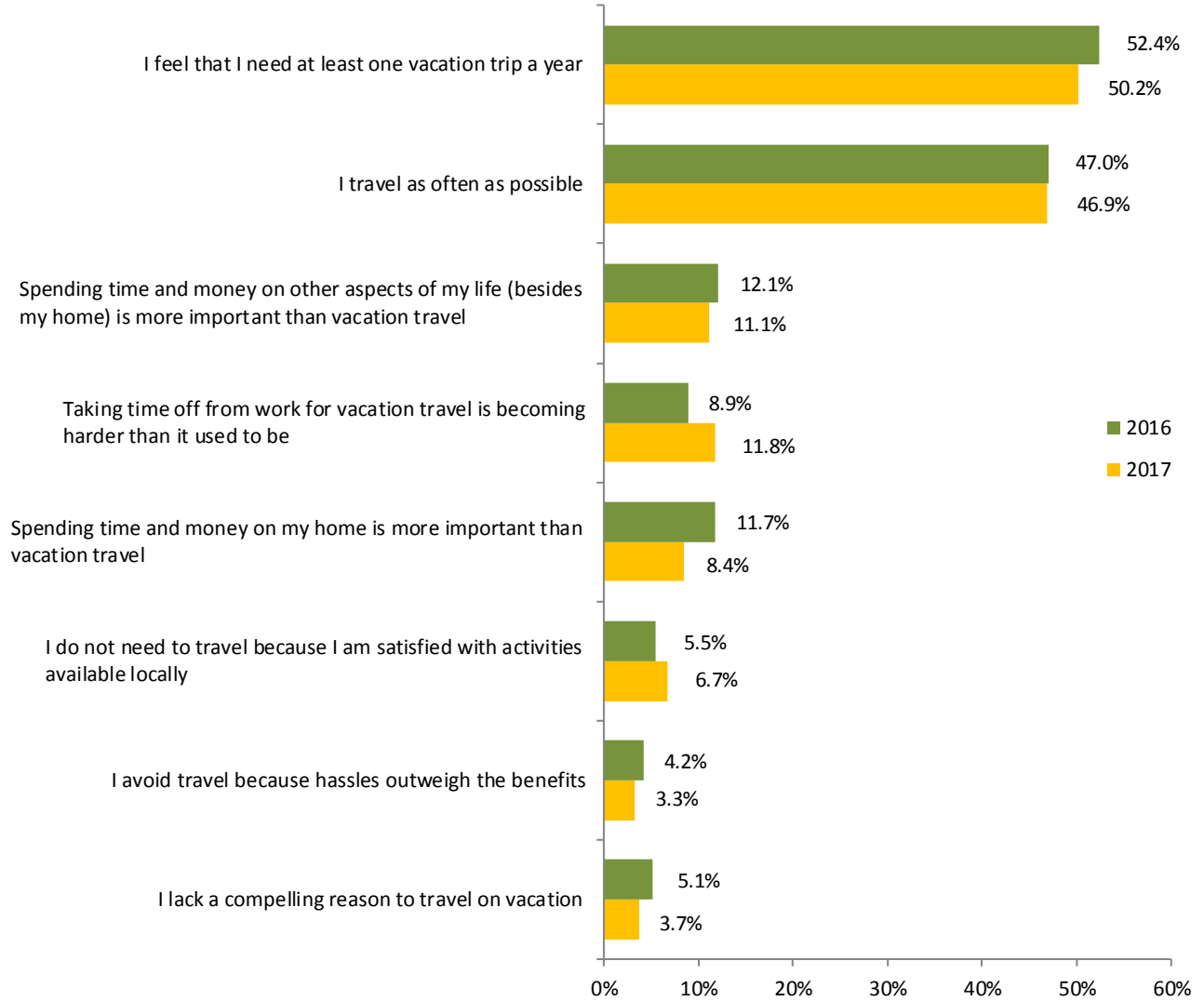
DMA of Origin	2016 Percentage of Total Overnight Visitors	2017 Percentage of Total Overnight Visitors
Raleigh-Durham (Fayetteville)	10.3%	12.6%
Charlotte	7.5%	10.7%
Greensboro-Winston Salem-High Point	6.2%	6.6%
Atlanta	5.6%	5.7%
Greenville-Spartanburg-Asheville-Anderson	6.5%	4.0%
Washington DC (Hagerstown, MD)	5.6%	3.8%
Norfolk-Portsmouth-Newport News	3.4%	3.7%
New York, NY	4.3%	2.9%
Greenville-New Bern-Washington	5.7%	2.7%
Wilmington	1.2%	2.4%
Philadelphia, PA	2.7%	2.3%
Richmond-Petersburg, VA	2.5%	2.1%
Columbia, SC	2.1%	1.8%
Baltimore	1.1%	1.5%
Miami	1.4%	1.4%
Myrtle Beach-Florence	1.3%	1.3%
Orlando-Daytona Beach-Melbourne	1.0%	1.3%
Nashville	0.8%	1.2%
Charleston, SC	0.7%	1.2%
Tampa-St. Petersburg (Sarasota)	1.2%	1.0%
Cleveland	1.0%	1.0%
Pittsburgh	0.9%	1.0%
Knoxville	0.8%	1.0%

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

Vacation Attitudes

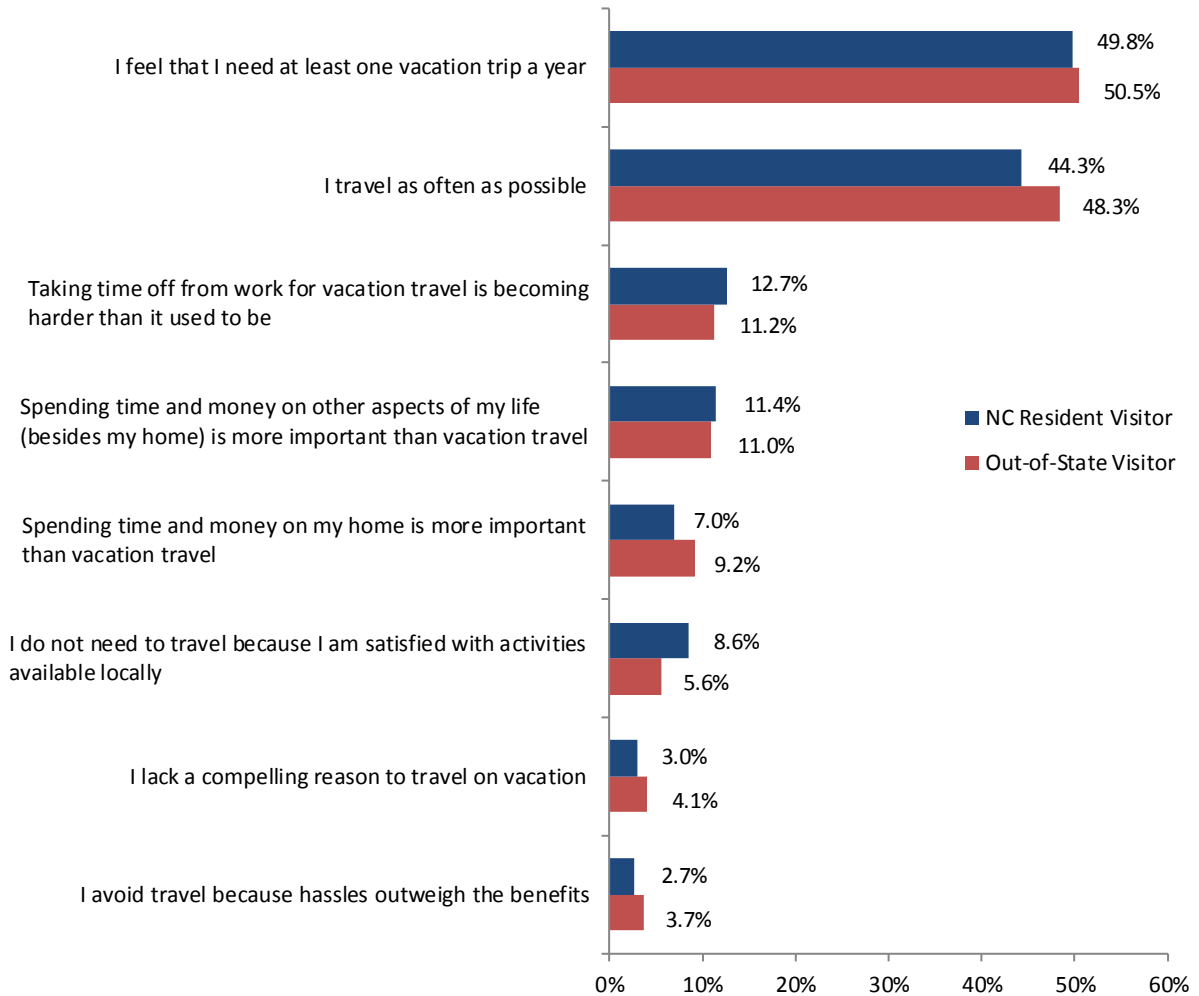
Half of North Carolina overnight visitors feel they need at least one vacation a year and nearly half also indicate that they travel as often as possible.

Current Feelings Concerning Vacation Travel



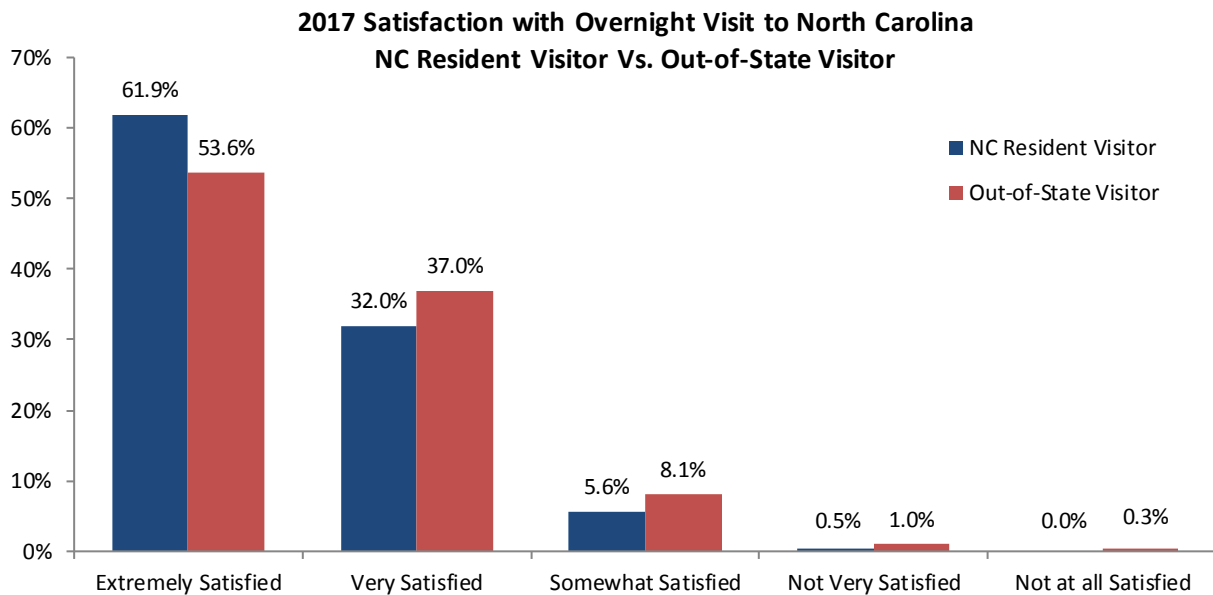
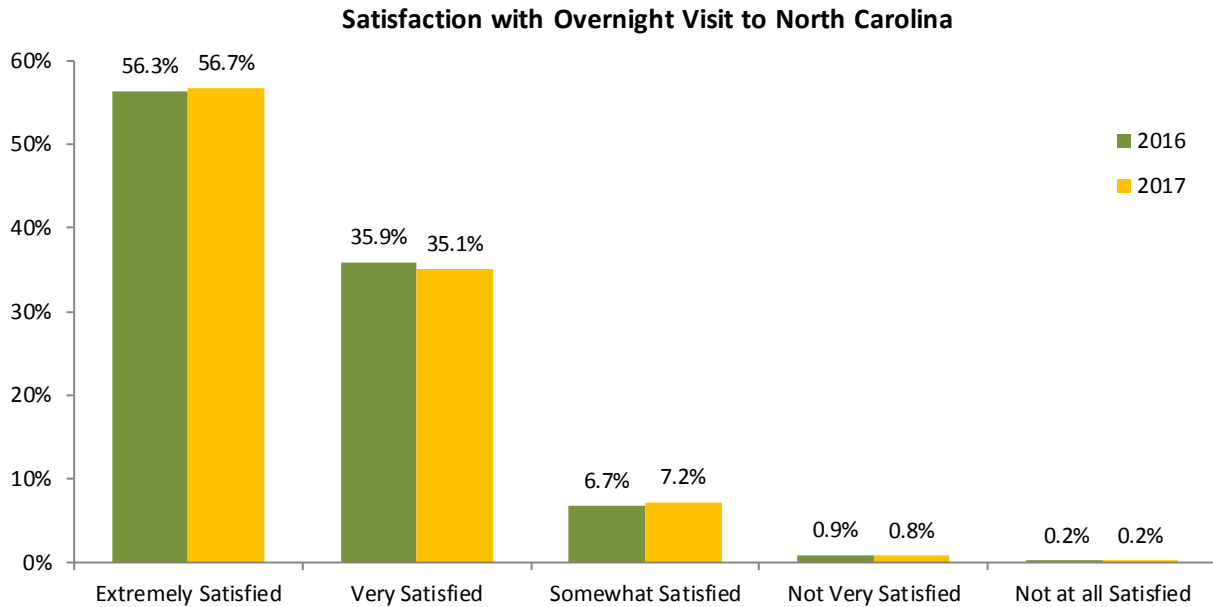
North Carolina out-of-state visitors are more likely to report that they travel as often as possible. Resident visitors more often note that they don't need to travel because of satisfaction with activities locally.

**2017 Current Feelings Concerning Vacation Travel
NC Resident Visitor Vs. Out-of-State Visitor**



Satisfaction with Overnight Visits to North Carolina

Ninety-two percent of overnight visitors to North Carolina in 2017 were either very or extremely satisfied with their visit. Both resident and out-of-state visitors express high satisfaction with their visits to and within North Carolina.



2017 North Carolina Daytrip Visitor Profile

Summary

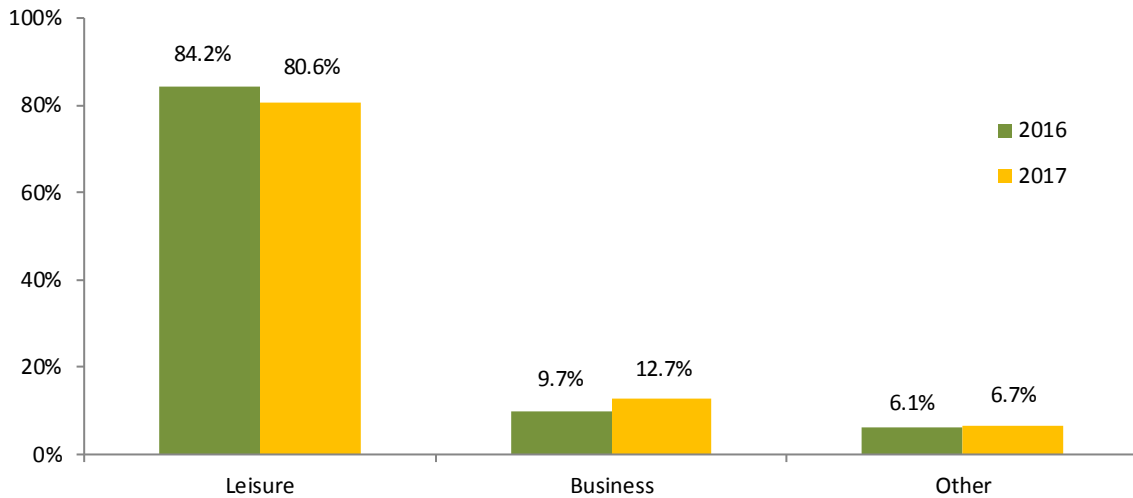
- ◆ In 2017, approximately 9.2 million daytrips were taken in North Carolina. North Carolina ranked #8 in the US in terms of daytrip visitation. A daytripper is defined as a visitor who did not spend any nights away from home, but traveled at least 50 miles one-way from home.
- ◆ Eighty-one percent of all daytrippers visited North Carolina for pleasure purposes, while thirteen percent of visitors came to conduct business (includes meeting/convention). The remaining respondents indicated an “other” reason for visiting the state.
- ◆ The fall (September - November) was the most popular season for day travel to North Carolina, with twenty-six percent of all 2017 daytrippers, followed by spring (March-May) with twenty-six percent, summer (June - August) with twenty-five percent and winter (December-February) with twenty-four percent. April was the single largest month for day travel to the state with more than nine percent, followed by November with nine percent.
- ◆ The average travel party size for daytrip visitor parties to North Carolina was 1.9 people. Twenty-one percent of travel parties to the state included children in the party.
- ◆ Nearly ninety-seven percent of daytrippers to the state drove (includes personal automobile, rental, motorcycle and RV).
- ◆ In 2017, the average household trip expenditure for daytrip parties to the state was approximately \$215 per visit, up from \$128 in 2016.
- ◆ The top states of origin of *daytrippers* to North Carolina were in-state residents (72.2%), and the nearby states of South Carolina (6.7%), Virginia (4.6%), Georgia (4.3%), Tennessee (3.5%) and Florida (1.2%).
- ◆ More than half (59.5%) of the households that traveled to North Carolina on a daytrip in 2017 had a household income over \$50,000.
- ◆ In 2017, Raleigh/Durham/Fayetteville (18.3%) was the top advertising market of origin for *daytrippers* to the state, followed by Charlotte (18.0%), Greenville-Spartanburg-Asheville (12.0%), Greensboro/High Point/Winston Salem (11.2%), and Greenville-New Bern-Washington (9.1%).

North Carolina Daytrip Visitor Profile

Main Purpose of Visit

In 2017, nearly eighty-one percent of daytrippers visited North Carolina for leisure purposes, which included visiting friends and relatives, outdoor recreation and entertainment/sightseeing. The proportion of daytrippers who visited for general business, convention, seminar or other group meeting increased from nearly ten percent in 2016 to nearly thirteen percent in 2017.

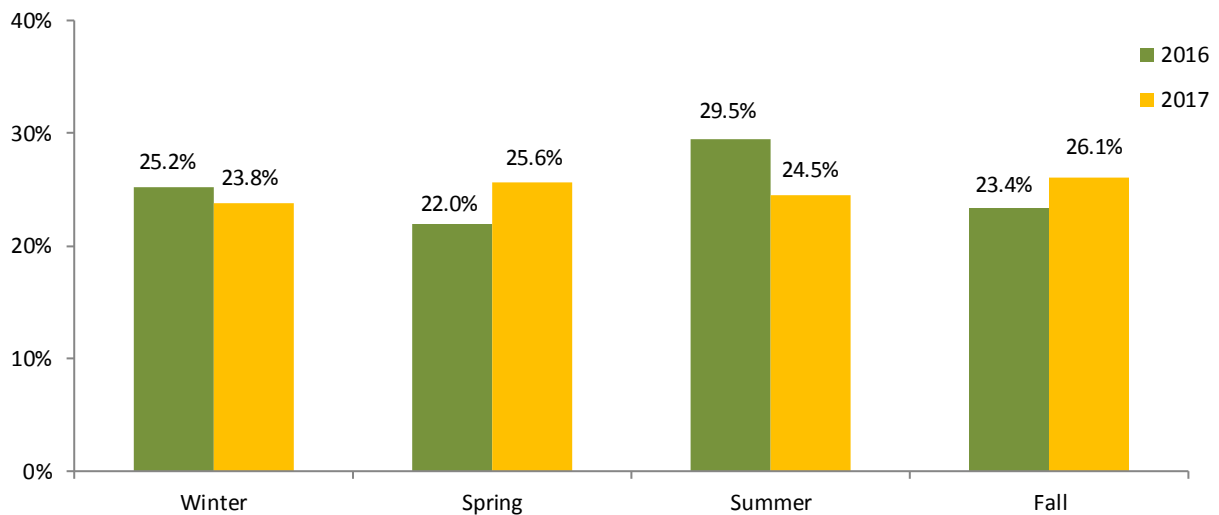
Primary Purpose of Daytrip to North Carolina



Travel Volume by Season

The proportion of daytrippers who traveled to and within North Carolina during the spring and fall months increased in 2017, with more than twenty-five percent of daytrippers visiting during spring and twenty-six percent visiting in the fall.

Daytrip Travel by Season to North Carolina



Travel Party Size

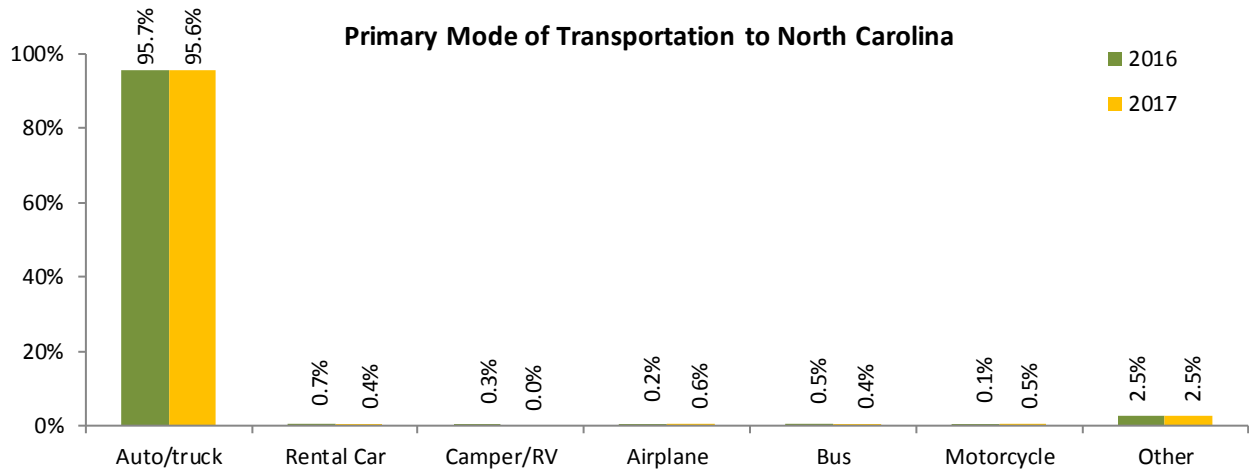
The average travel party size for North Carolina daytrippers in 2017 was 1.9 people.

Children on Trip

Twenty-one percent of daytrip parties to North Carolina included children. Among those who traveled with children, the average number of children on trips was 1.9.

Mode of Transportation

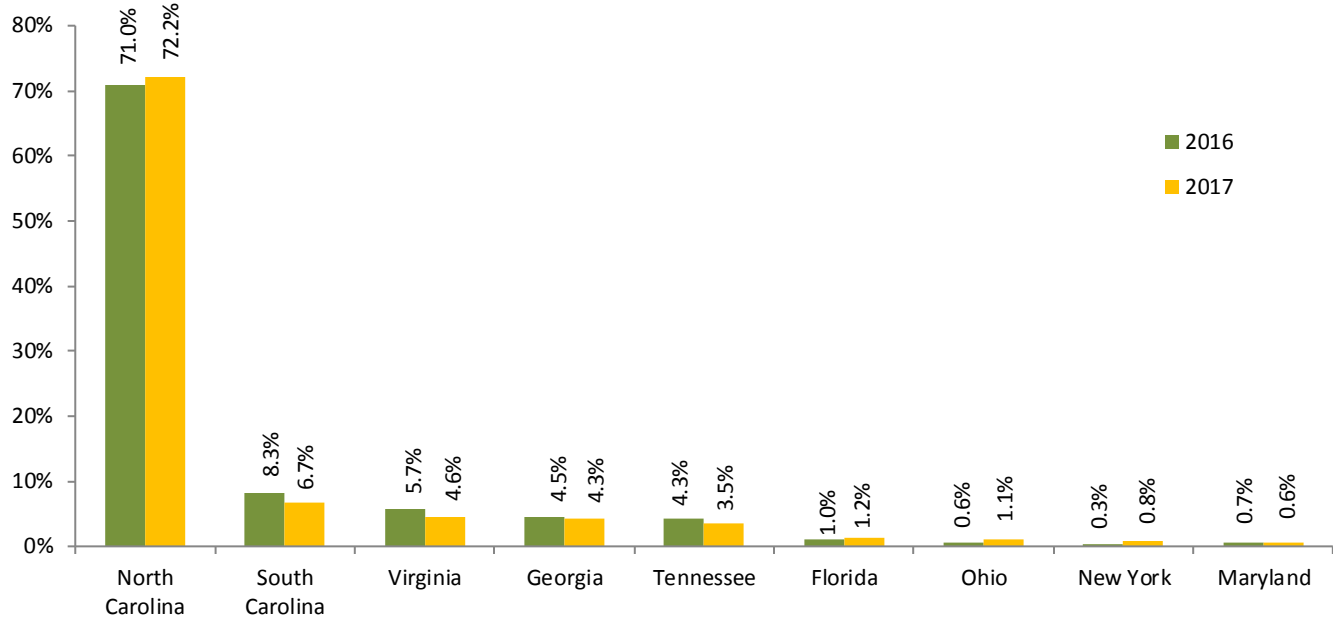
The primary mode of transportation by daytrippers to North Carolina is the personal auto (95.6%), while less than five percent of daytrippers choose an alternate form of transportation.



Origin of Visitors

As expected, the top states of origin for North Carolina daytrippers in 2017 were residents and those from nearby states; North Carolina (72.2%), South Carolina (6.7%), Virginia (4.6%) and Georgia (4.3%).

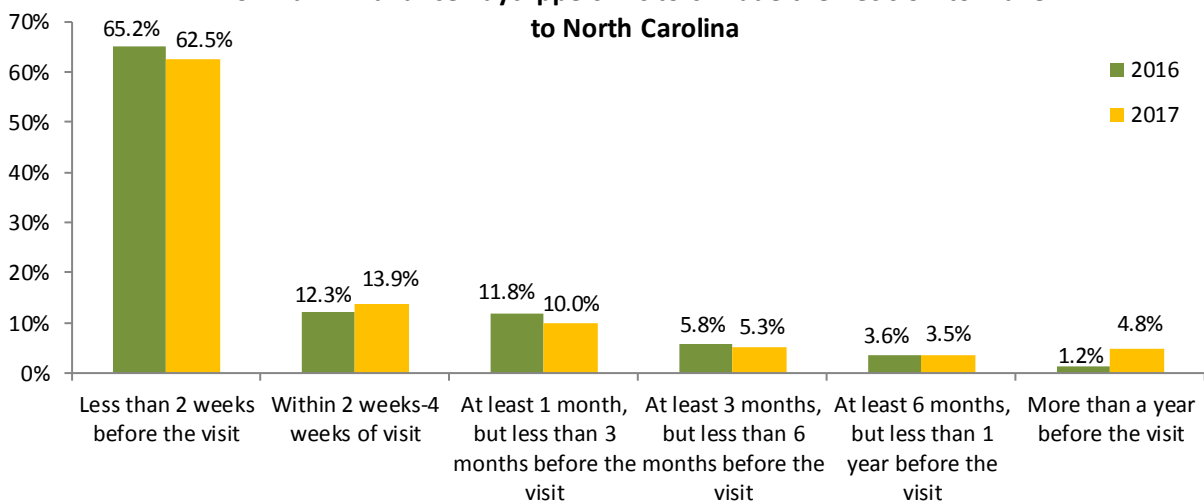
Top States of Origin of Daytrippers to North Carolina



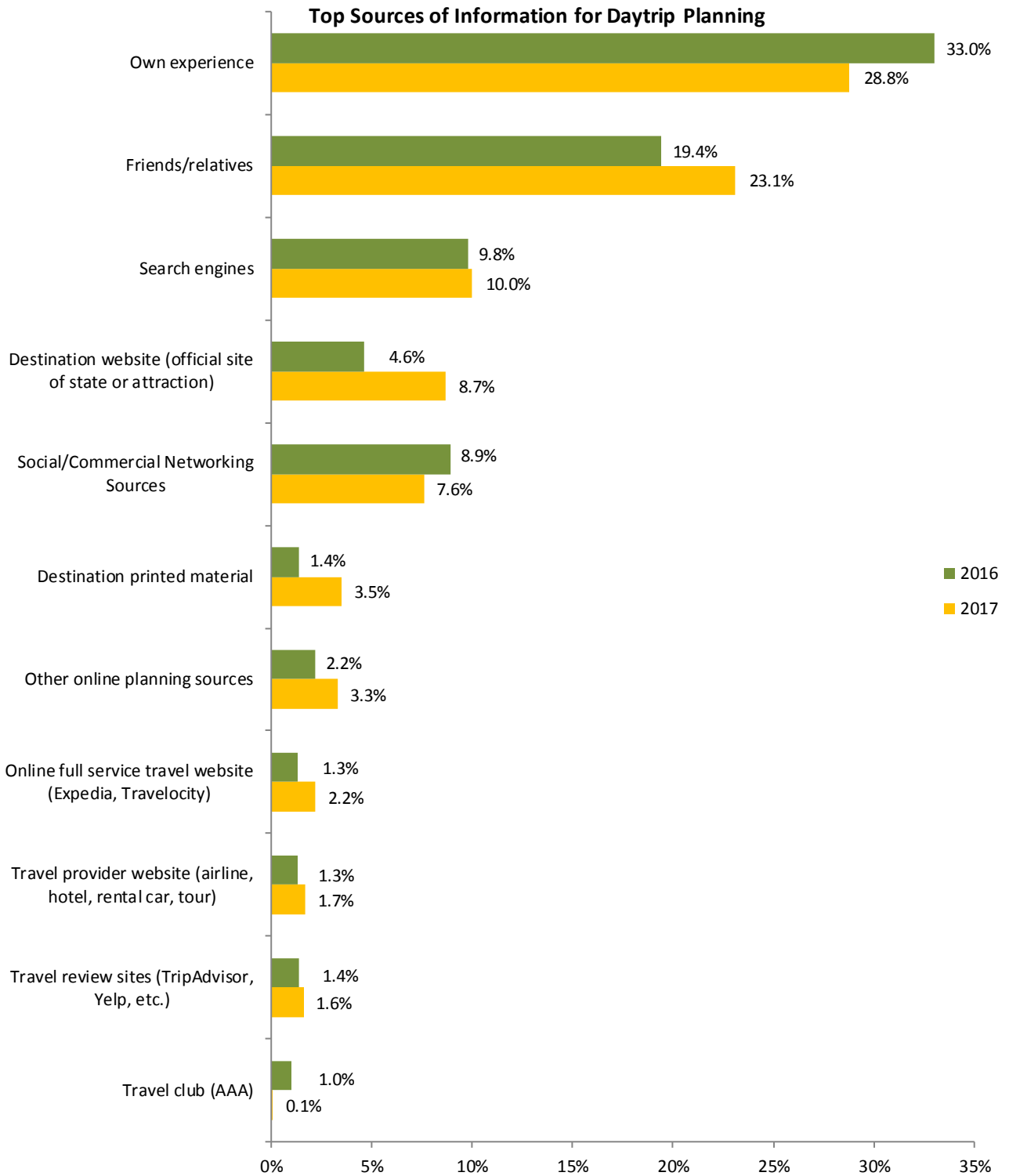
Trip Planning

Not surprisingly, daytrippers to and within North Carolina planned their visits within a shorter timeframe than overnighters. Nearly two-thirds of 2017 daytrip visitors made the decision to visit North Carolina less than two weeks before the visit.

How Far in Advance Daytrippers Visitors Made the Decision to Travel to North Carolina

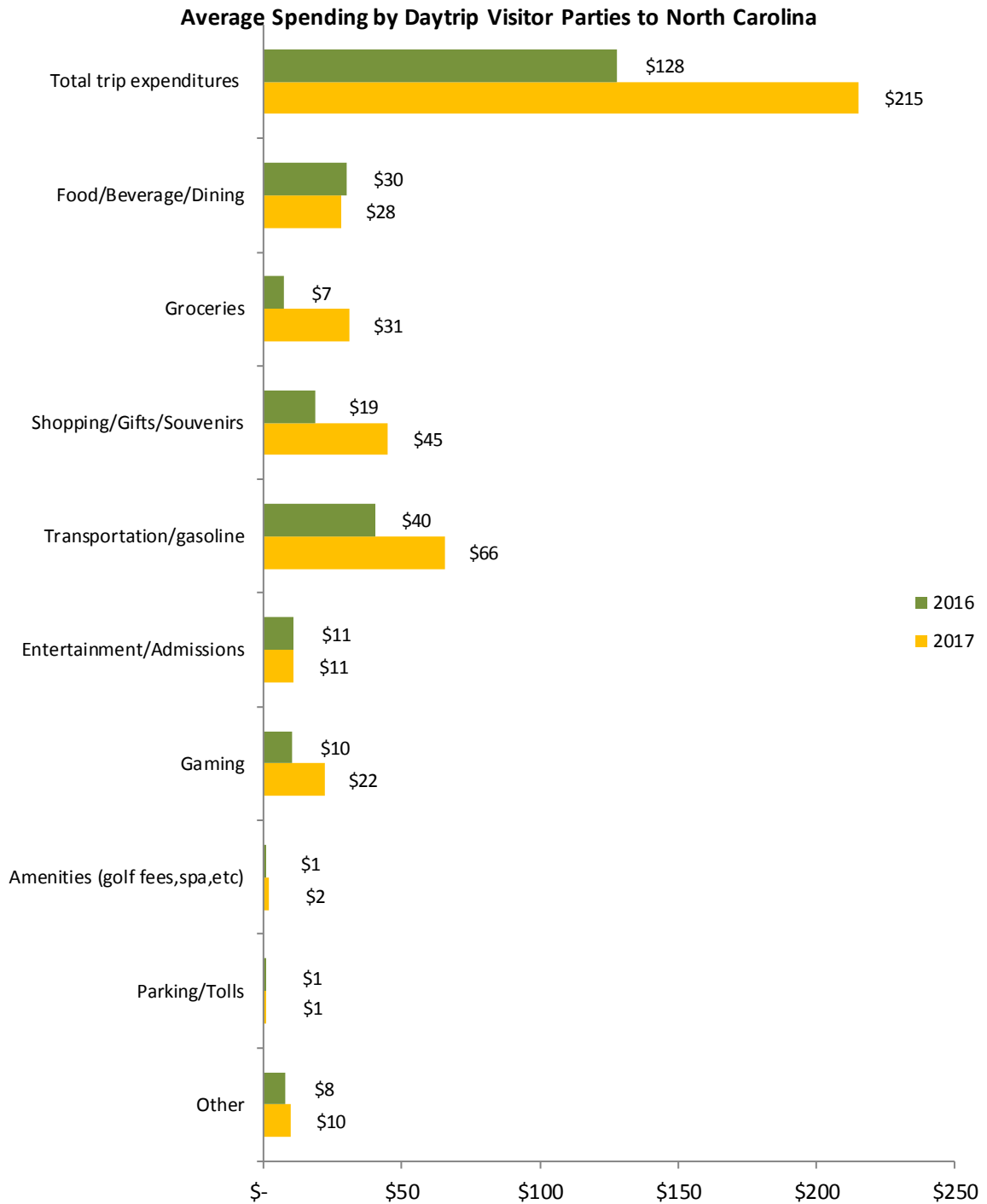


The top source of information for daytrip planning in North Carolina is personal experience, followed by friends/relatives, search engines, official destination websites and social networking.



Expenditures by North Carolina Daytrippers

The average daytrip visitor party spending in the state was \$215 in 2017, up from \$128 in 2016. The largest increases in spending for daytrippers was from transportation/gasoline, groceries, shopping and gaming.



Activities

Nineteen percent of the daytrippers to North Carolina in 2017 visited relatives while on a daytrip in the state and sixteen percent participated in shopping. Eight percent participated in rural sightseeing, seven percent visited friends and six percent participated in fine dining on their daytrip. Activity participation with the largest growth in proportion of daytrippers included museums (+3 percentage points), zoos/aquariums/aviaries (+3 percentage points), urban sightseeing (+2 percentage points) and hiking/backpacking (+2 percentage points).

***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 Daytrippers to North Carolina

Activity	2016	2017	Activity	2016	2017
Visiting Relatives	18%	19%	Sports events – Major/Professional	<1%	2%
Shopping	15%	16%	Special Events/Festivals	2%	2%
Rural Sightseeing	10%	8%	Art Galleries	1%	2%
Visiting Friends	8%	7%	Gardens	1%	1%
Fine Dining	7%	6%	Wine Tasting/Winery Tour	2%	1%
Museums	2%	5%	Theme Park/Amusement Park/Water Park	3%	1%
Urban Sightseeing	3%	5%	Sport Event-Youth/Amateur/ Collegiate/Other(Participant)	1%	1%
Casino/Gaming	3%	4%	Theater/Drama	1%	1%
Zoos/Aquariums/Aviaries	1%	4%	Craft Breweries	1%	1%
Hiking/Backpacking	2%	4%	Nightclubs/Dancing	1%	1%
Historic Sites/Churches	5%	3%	Horseback riding	<1%	1%
State Park/Monument/Recreation area	3%	3%	Musical Theater	<1%	1%
National Park/Monument/Recreation area	3%	3%	Golf	<1%	1%
Other nature (photography, rockhounding, etc.)	2%	3%	Local/folk arts/crafts	3%	<1%
Old Homes/Mansions	2%	3%	Bird Watching	1%	<1%
Sport Event-Youth/Amateur/ Collegiate/Other(Spectator)	2%	3%	Native American ruins/Rock art	1%	<1%
Beach	4%	2%	Fishing	1%	<1%
Wildlife Viewing	3%	2%	Area where a TV show or movie was filmed	<1%	<1%
Nature Travel/Eco-touring	2%	2%	Hunting	<1%	<1%
Musical performance/show	2%	2%	Symphony/opera/concert	<1%	<1%

Demographic Profile of North Carolina Daytrip Visitors

Over half (60%) of North Carolina daytrippers of the visitors are married and nineteen percent the region's visitors are divorced, widowed or separated.

The largest proportion of North Carolina daytrippers classify themselves as white (84.9%), and ten percent classify themselves as black/African American.

Over half (58.7%) of North Carolina daytrippers have a household head with a college degree or higher. The average daytripper is 49 years old.

The average North Carolina daytripper has 7 vacation days each year.

One-third (33.0%) of the daytrip visitor parties that traveled to North Carolina in 2017 had a household income \$75,000 or over. Twelve percent had a household income of over \$125,000. The average household income of a daytrip visitor party in 2017 was \$68,010.

Just over half (50.8%) of daytrip visitor parties reported that the head of household is employed, while twenty-five percent are retired. The remainder reported "not employed" as work status.

The average household size of a North Carolina daytrip visitor party in 2017 was 2.6.

2017 Top Advertising Markets

In 2017, the top advertising markets sending daytrippers to **North Carolina** were Raleigh-Durham-Fayetteville (18.3%), Charlotte (18.0%), Greenville-Spartanburg-Asheville (12.0%), Greensboro-Winston-Salem-High Point (11.2%), and Greenville-New Bern-Washington (9.1%). The top out-of-state daytrip markets were Greenville-Spartanburg, Norfolk-Portsmouth-Newport News, Atlanta, Myrtle Beach-Florence, Knoxville and Columbia. Advertising markets correspond with Nielsen's Designated Market Areas (DMAs).

Top Advertising Markets of Origin for North Carolina *Daytrippers*

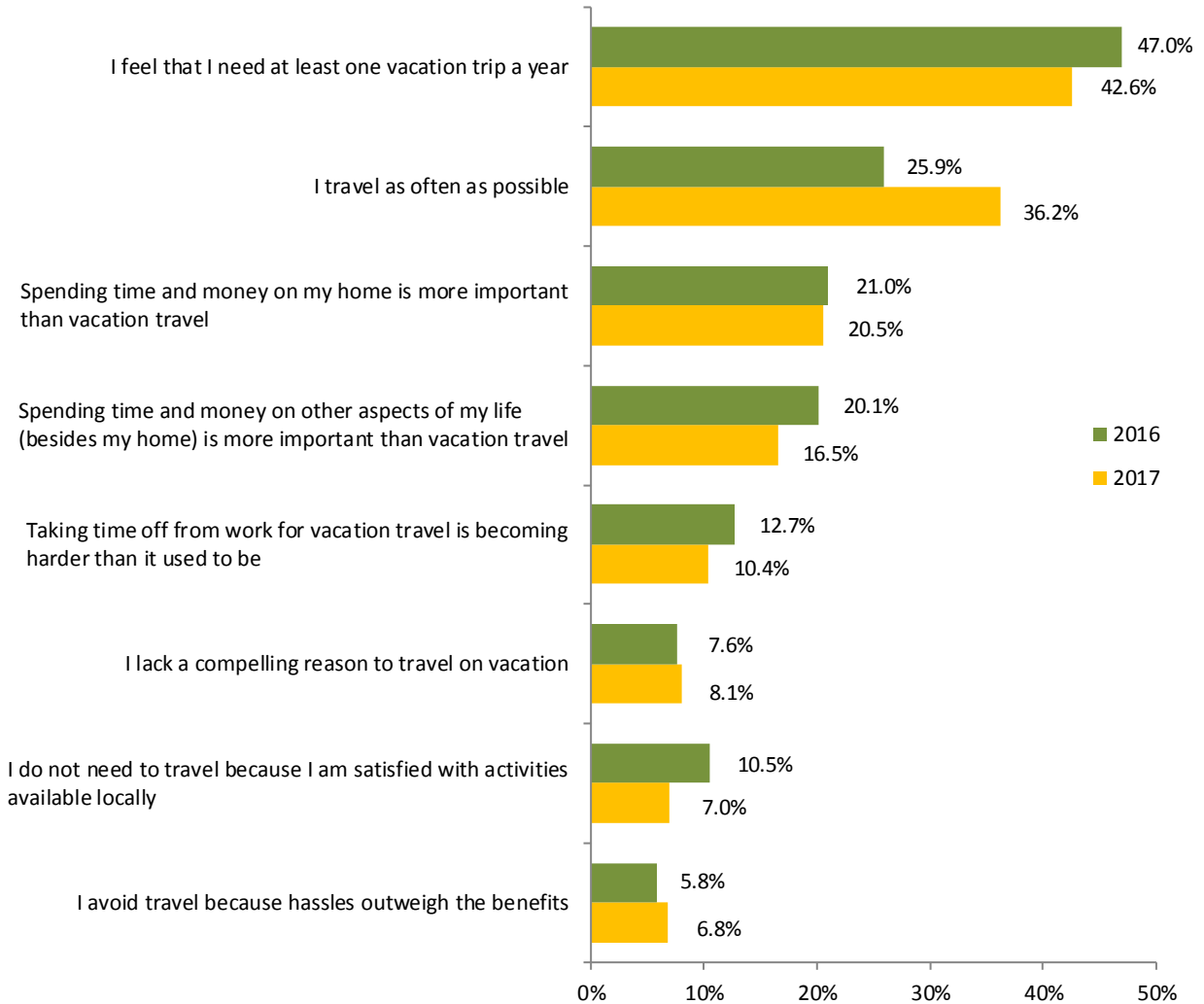
DMA of Origin	2016 Percentage of Total Daytrippers	2017 Percentage of Total Daytrippers
Raleigh-Durham (Fayetteville)	20.1%	18.3%
Charlotte	15.5%	18.0%
Greenville-Spartanburg-Asheville-Anderson	13.6%	12.0%
Greensboro-Winston Salem-High Point	13.3%	11.2%
Greenville-New Bern-Washington	8.7%	9.1%
Norfolk-Portsmouth-Newport News	1.5%	3.8%
Atlanta	4.2%	3.3%
Wilmington	4.3%	2.6%
Myrtle Beach-Florence	1.4%	1.8%
Knoxville	2.0%	1.7%
Columbia, SC	0.8%	1.5%
Roanoke/Lynchburg, VA	1.2%	1.4%
Washington DC	0.9%	1.3%
Tri-Cities, TN-VA	1.3%	1.0%

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

Vacation Attitudes

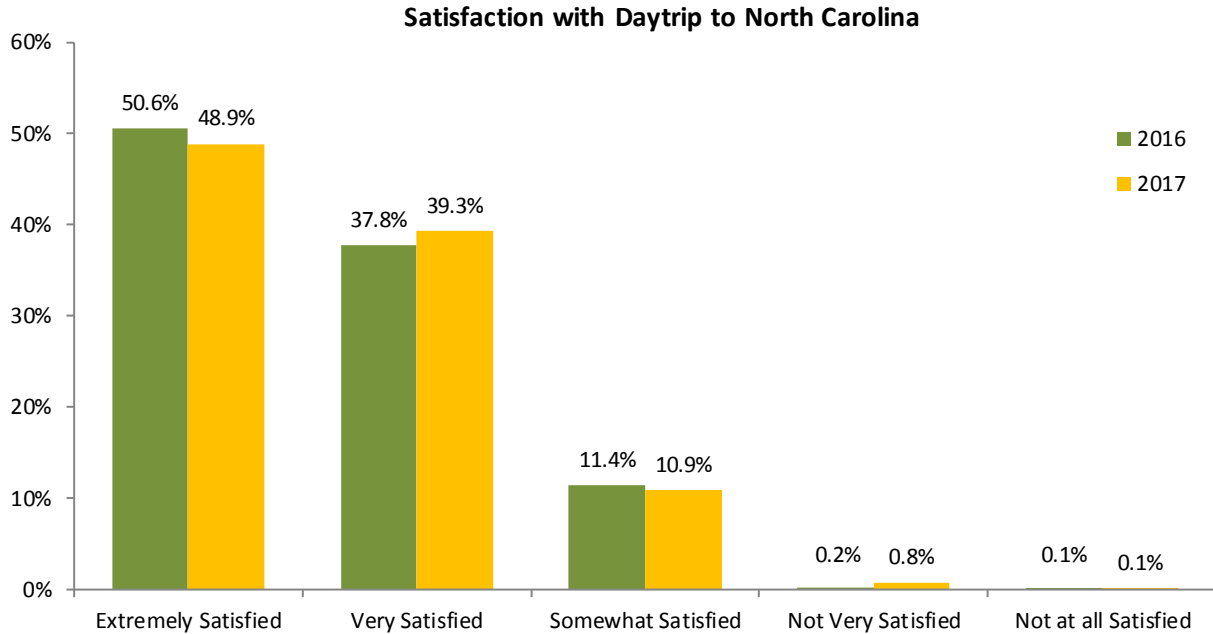
Nearly half of North Carolina daytrippers report that they need at least one vacation a year and more than one-third note that they travel as often as possible. Less than seven percent indicate that they avoid travel due to the hassles involved with traveling.

Current Feelings Concerning Vacation Travel



Satisfaction with Daytrips to North Carolina

More than eighty-eight percent of daytrippers to North Carolina in 2017 were either very or extremely satisfied with their daytrip to or within the state. Less than one percent were not satisfied.

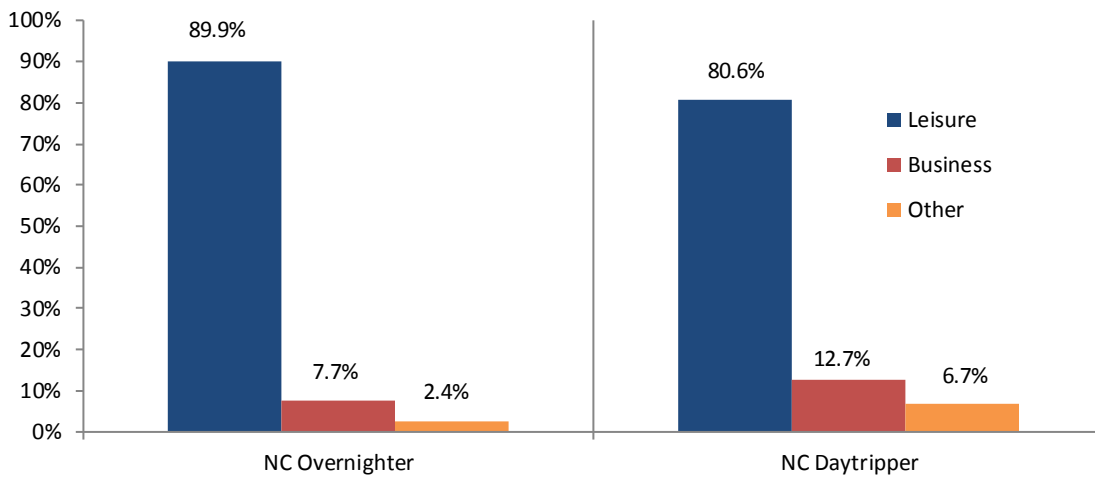


2017 Overnight vs. Daytrip Comparison

The following section provides comparisons and contrasts of North Carolina's overnight and day visitors.

While daytrippers are slightly more likely to be traveling in North Carolina for business, both overnights and daytrippers primarily travel for leisure purposes.

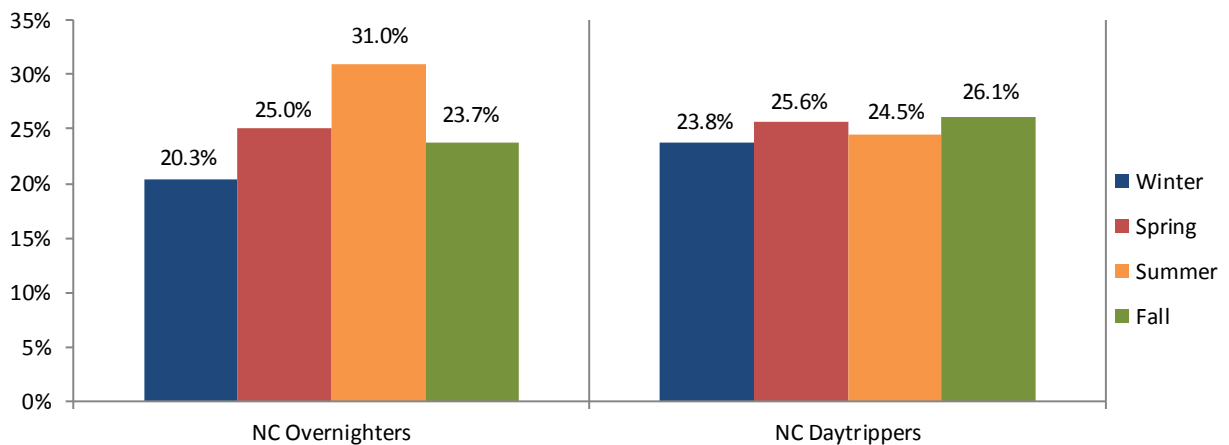
2017 Primary Purpose of Trip



Travel Volume by Season

The seasonal distribution of visitors helps to understand the flow of travelers through the state. Overnights were more likely to visit during the summer than daytrippers, while daytrip visitation was spread fairly evening throughout the year.

2017 Season of Travel



The average party size for overnight visitors was slightly larger than that of daytrippers in 2017. Daytrip visitor parties were less likely to include children in the party. This may be due to the increased proportion of business daytrips in 2017.

2017 Travel Party Size

North Carolina Overnighters	North Carolina Daytrippers
2.1 people	1.9 people

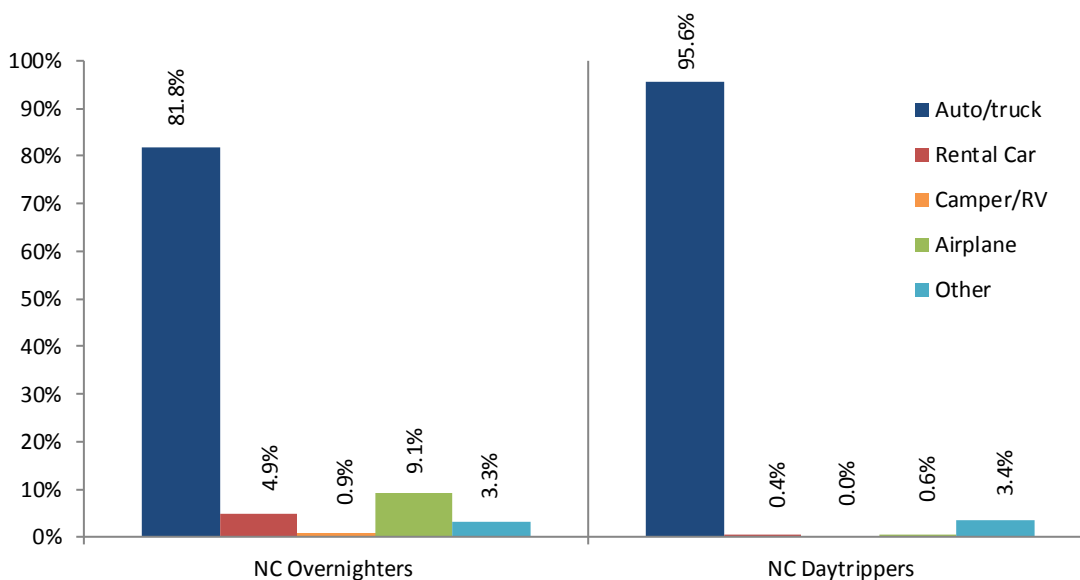
2017 Children on Trip

North Carolina Overnighters	North Carolina Daytrippers
26.3%	20.5%

Mode of Transportation

Not surprisingly, auto transportation was the primary use of travel by all North Carolina visitors, both overnighters and daytrippers. Nine percent of overnighters used air transportation, while less than one percent of daytrippers flew to the state for the day.

2017 Primary Transportation by Overnight Visitors



Origin of Visitors

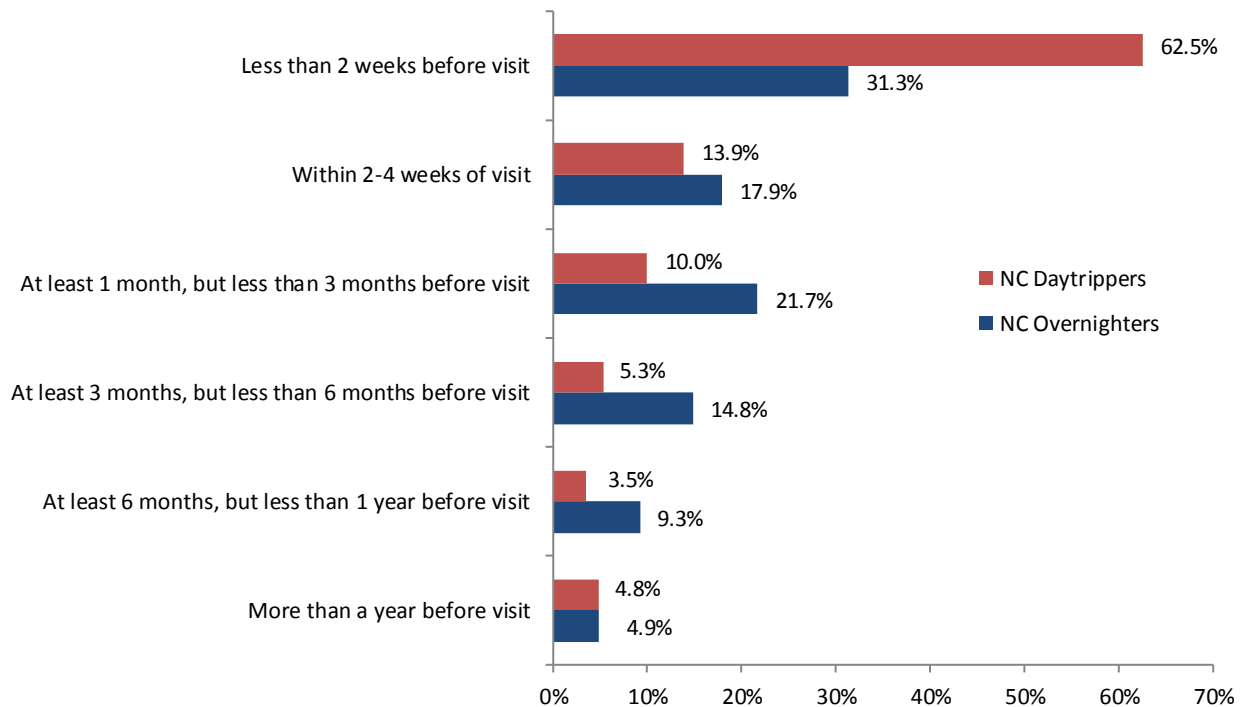
North Carolina is the top state of origin for both overnights and daytrippers to the state. In-state residents comprise thirty-nine percent of the state’s overnight visitors and nearly three-fourths of the state’s daytrippers.

NC Overnights	NC Daytrippers
North Carolina (38.9%)	North Carolina (72.2%)
Virginia (8.4%)	South Carolina (6.7%)
South Carolina (7.2%)	Virginia (4.6%)
Georgia (6.3%)	Georgia (4.3%)
Florida (5.3%)	Tennessee (3.5%)
New York (3.9%)	Florida (1.2%)
Tennessee (3.3%)	Ohio (1.1%)
Ohio (2.9%)	New York (0.8%)
Maryland (2.7%)	Maryland (0.6%)
Pennsylvania (2.6%)	Pennsylvania (0.5%)

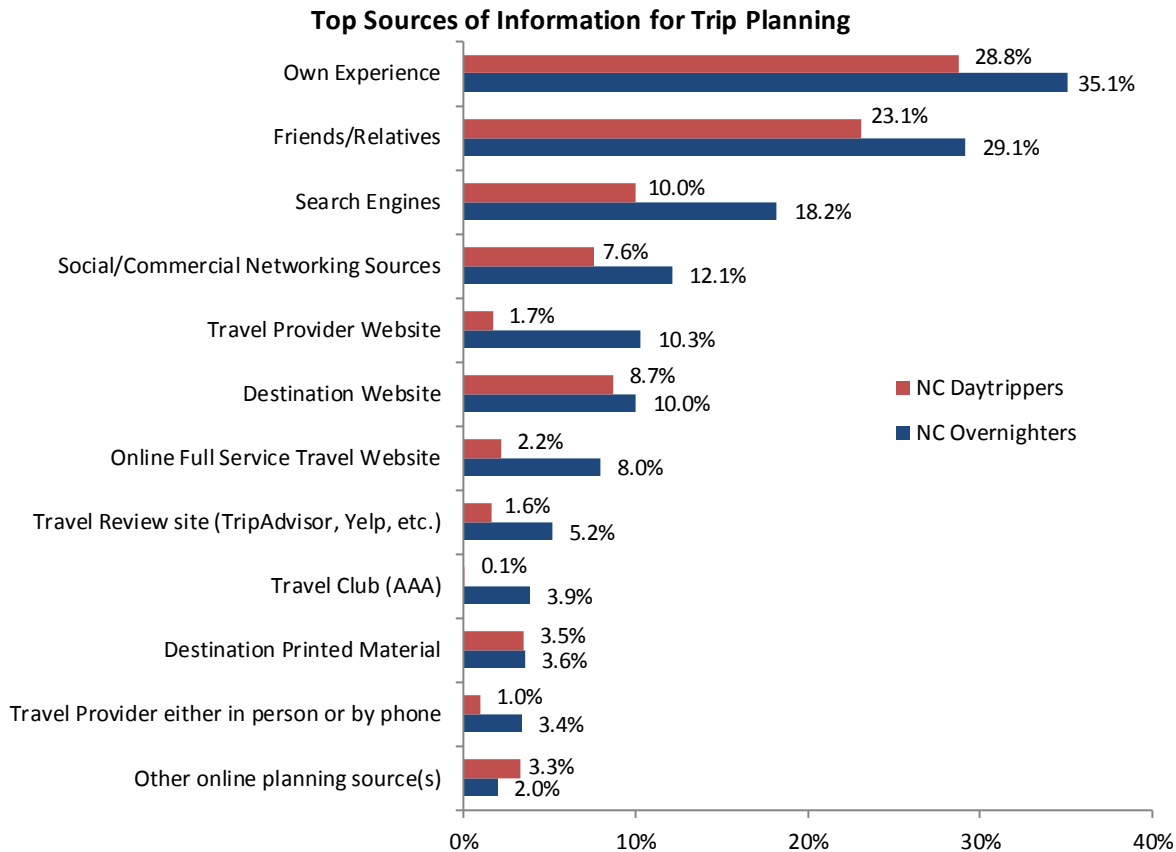
Trip Planning

Daytrippers, not surprisingly, made the decision to visit North Carolina in a shorter time frame than overnights. Nearly two-thirds made the decision less than 2 weeks prior to the visit, while just over thirty percent of overnights made the decision to visit the state less than 2 weeks before travel.

How Far in Advance Decision Was Made to Visit North Carolina

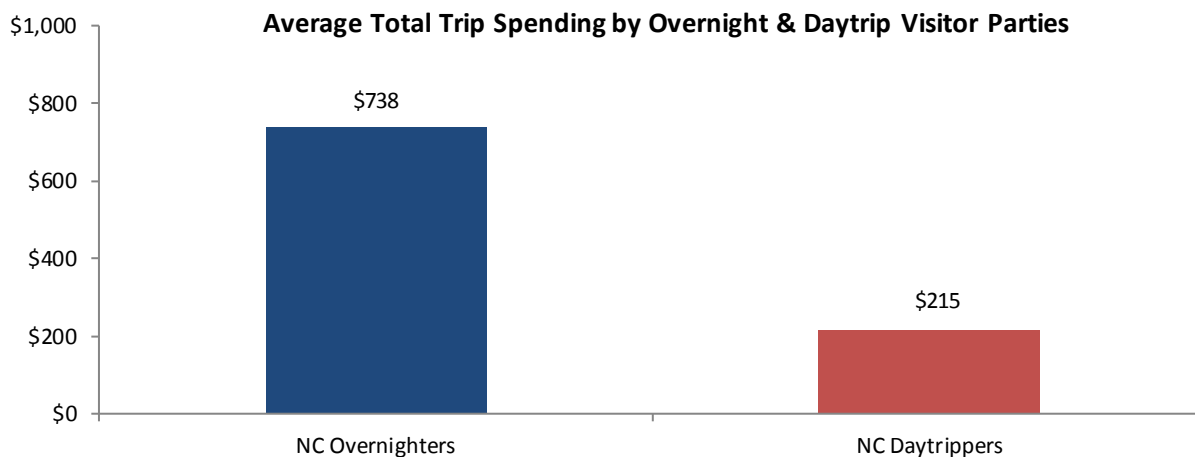


In trip planning, overnighters to North Carolina relied on a larger variety of sources than daytrippers. In particular, they used personal experience, friends/relatives, search engines, social media and websites more than daytrippers.



Trip Expenditures

On average, 2017 overnight visitor parties to and within North Carolina spent approximately \$500 more per trip than daytrippers.



Activities

Activities participated in by North Carolina travelers vary by their length of stay, but common activities between regions include visiting relatives, shopping, dining, visiting friends and sightseeing.

NC Overnighers	NC Daytrippers
Visiting Relatives (31%)	Visiting Relatives (19%)
Shopping (26%)	Shopping (16%)
Visiting Friends (15%)	Rural Sightseeing (8%)
Beach (15%)	Visiting Friends (7%)
Rural Sightseeing (15%)	Fine Dining (6%)
Fine Dining (13%)	Museums (5%)
Historic Sites/Churches (11%)	Urban Sightseeing (5%)
State Park/Monument/Recreation area (10%)	Casino/Gaming (4%)
Museums (9%)	Zoos/Aquariums/Aviaries (4%)
Urban Sightseeing (8%)	Hiking/Backpacking (4%)
Hiking/Backpacking (7%)	Historic Sites/Churches (3%)
Wildlife Viewing (7%)	State Park/Monument/Recreation area (3%)
Craft Breweries (6%)	National Park/Monument/Recreation area (3%)
National Park/Monument/Recreation area (6%)	Other nature (photography, rockhounding, etc.) (3%)
Gardens (5%)	Old Homes/Mansions (3%)
Fishing (5%)	Sport Event-Youth/Amateur/Collegiate/Other(Spectator) (3%)
Old Homes/Mansions (5%)	Beach (2%)
Wine Tasting/Winery Tour (4%)	Wildlife Viewing (2%)
Casino/Gaming (4%)	Nature Travel/Eco-touring (2%)
Local/folk arts/crafts (4%)	Musical performance/show (2%)
Other nature (photography, rockhounding, etc.) (3%)	Sports events – Major/Professional (2%)
Nightclubs/Dancing (3%)	Special Events/Festivals (2%)
Nature Travel/Eco-touring (3%)	Art Galleries (2%)
Special Events/Festivals (3%)	Wine Tasting/Winery Tour (1%)
Musical performance/show (3%)	Gardens (1%)
Zoos/Aquariums/Aviaries (3%)	Theme Park/Amusement Park/Water Park (1%)
Art Galleries (3%)	Sport Event-Youth/Amateur/ Collegiate/Other(Participant) (1%)
Golf (3%)	Theater/Drama (1%)
Sport Event-Youth/Amateur/Collegiate/Other(Spectator) (2%)	Craft Breweries (1%)
Biking/Road Biking/Cycling (2%)	Nightclubs/Dancing (1%)
Bird Watching (2%)	Horseback riding (1%)
Theme Park/Amusement Park/Water Park (2%)	Musical Theater (1%)
Spa/Health Club (2%)	Golf (1%)
Rafting/Kayaking/Canoeing/Paddleboarding (2%)	Local/folk arts/crafts (<1%)
Horseback riding (1%)	Bird Watching (<1%)
Native American ruins/Rock art (1%)	Native American ruins/Rock art (<1%)
Theater/Drama (1%)	Fishing (<1%)
Motorboat/Jet ski (1%)	Area where a TV show or movie was filmed (<1%)
Symphony/opera/concert (1%)	Hunting (<1%)
Farms/Ranches/Agri-tours (1%)	Symphony/opera/concert (<1%)

Demographic Profile for 2017 North Carolina Visitors

	North Carolina Overnighters	North Carolina Daytrippers
Average age of household head	47.0 years of age	48.6 years of age
Average household size	2.7	2.6
Education of Household Head		
High school or less	12.0%	18.3%
Some college – no degree	19.2%	23.0%
Completed college	47.7%	46.2%
Post Graduate College	21.1%	12.5%
Annual Household Income		
Less than \$30,000	11.6%	21.5%
\$30,000-\$49,999	13.4%	19.0%
\$50,000-\$74,999	21.2%	26.5%
\$75,000 & over	53.8%	33.0%
Average Annual Income	\$88,620	\$68,010
Employment		
Employed	62.4%	50.8%
Retired	22.9%	24.9%
Not employed	14.7%	24.3%
Marital Status		
Married	65.5%	60.0%
Never married	22.6%	20.9%
Divorced, widowed, separated	11.9%	19.1%
Ethnicity		
White	87.9%	84.9%
Black/African American	6.6%	10.3%
Asian or Pacific Islander	2.8%	1.5%
Other	2.7%	3.3%

2017 Top Advertising Markets

The top advertising markets for the overnights and daytrippers were very similar, but differences can be noted in the ranks. Atlanta ranks fourth in terms of overnights, while the DMA ranks seventh for daytrippers to and within the state. It is worth noting the proportion of daytrip visitors from states such as New York who are likely visiting the state while traveling to other destinations along north/south highways.

NC Overnights

Raleigh-Durham-Fayetteville (12.6%)
Charlotte (10.7%)
Greensboro-Winston Salem-High Point- (6.6%)
Atlanta (5.7%)
Greenville-Spartanburg-Asheville (4.0%)
Washington, DC (Hagerstown, MD) (3.8%)
Norfolk-Portsmouth-Newport News (3.7%)
New York (2.9%)
Greenville-New Bern-Washington (2.7%)
Wilmington (2.4%)
Philadelphia (2.3%)
Richmond-Petersburg (2.1%)
Columbia (1.8%)
Baltimore (1.5%)
Miami/Ft. Lauderdale (1.4%)

NC Daytrippers

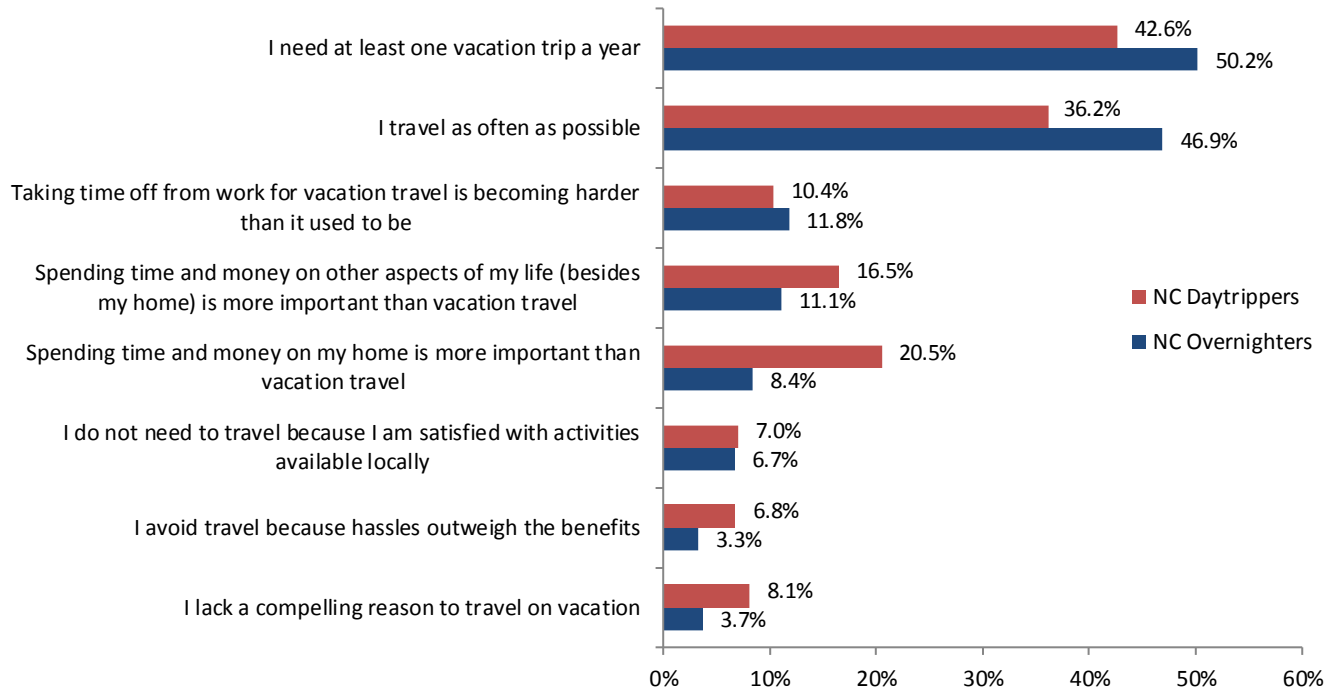
Raleigh-Durham-Fayetteville (18.3%)
Charlotte (18.0%)
Greenville-Spartanburg-Asheville (12.0%)
Greensboro-Winston Salem-High Point (11.2%)
Greenville-New Bern-Washington (9.1%)
Norfolk-Portsmouth-Newport News (3.8%)
Atlanta (3.3%)
Wilmington (2.6%)
Myrtle Beach-Florence (1.8%)
Knoxville (1.7%)
Columbia (1.5%)
Roanoke-Lynchburg (1.4%)
Washington DC (1.3%)
Tri-Cities, TN-VA (1.0%)
New York (0.9%)

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

Vacation Attitudes

Not surprisingly, both overnights and daytrippers feel the need for a vacation at least once a year. Nearly half of overnights and one-third of daytrippers report that they travel as often as possible.

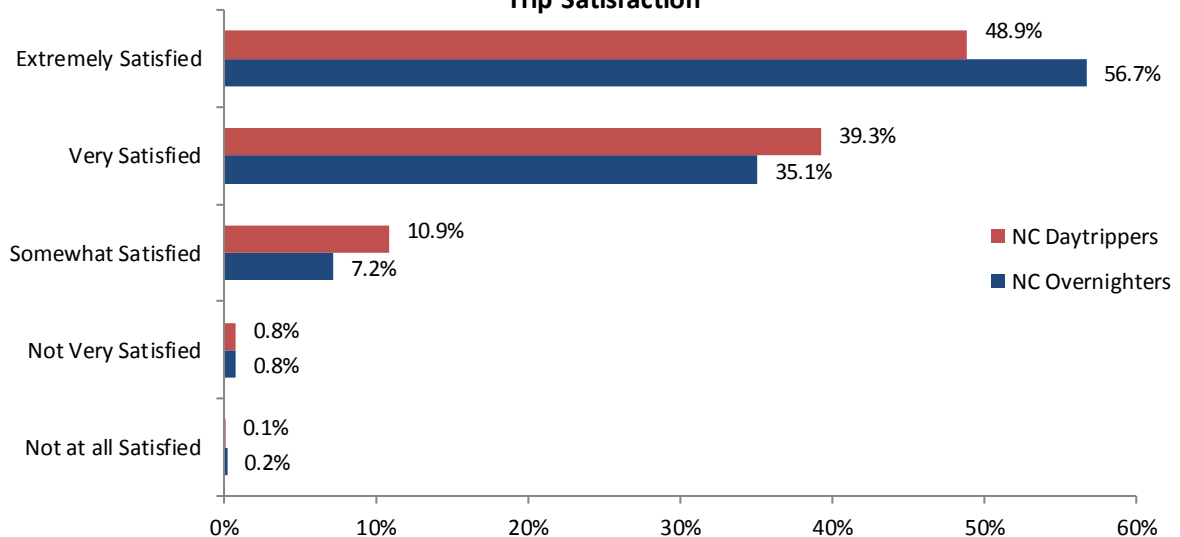
Current Feelings Concerning Vacation Travel



Trip Satisfaction

Both overnight visitors and daytrippers in North Carolina reported high trip satisfaction in 2017. Ninety-two percent of overnights and eighty-eight percent of daytrippers expressed they were extremely or very satisfied with their trip.

Trip Satisfaction



2017 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.