

2018 North Carolina Visitor Profile

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



2018 North Carolina Visitor Profile

Visit North Carolina contracts with the research company OmniTrak Group, Inc. for data on North Carolina visitors through its TravelTrakAmerica product. TravelTrakAmerica is a continuation of TNS' TravelsAmerica which began in 2005, and through which North Carolina has received visitor profile data since that time.

The TravelTrakAmerica product is based upon a nationally representative sample from the LightSpeed Research USA Panel of over 1,000,000 households. Each month, TravelTrakAmerica research program 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 are 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 TravelTrakAmerica.

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.

2018 North Carolina Visitor Profile

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2018 North Carolina Visitor Profile

Total Visitor Summary

- ◆ In 2018, approximately 51 million person-trips were taken in North Carolina and the state ranked #6 in the US in terms of domestic visitation.
- ◆ Ninety percent of all domestic visitors came to North Carolina for pleasure purposes, while seven 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 thirty-one percent of all 2018 visitors. The fall (September - November) and spring (March - May) seasons each had twenty-four percent of the annual visitors. The winter (December-February) saw twenty-one percent of visitors in 2018. July was the single largest month for travel to the state with eleven percent, followed by June (10.2%) and August (9.9%).
- ◆ Forty-eight percent of North Carolina overnight visitors lodged in a hotel/motel, while thirty-four percent stayed in a private home. Eight percent stayed in a rental home or condo, while nearly four percent stayed in a personal second home or condo. Three percent stayed in an RV park or campground and approximately four 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 2.2. Thirty percent of travel parties to the state included children in the party.
- ◆ Eighty-nine percent of all travelers to the state drove (includes personal automobile, rental, motorcycle and RV), while eight percent traveled by air.
- ◆ In 2018, the average household trip expenditure by visitors to North Carolina was \$564. The average trip expenditure for overnight visitors was \$721. Daytrip parties to the state spent approximately \$203 per visit.
- ◆ The top states of origin of *total* visitors to North Carolina were in-state residents (44.8%), South Carolina (8.9%), Virginia (7.8%), Georgia (6.3%), Florida (4.1%), Tennessee (3.2%), New York (3.1%), Pennsylvania (3.1%), Ohio (2.5%) and Maryland (2.2%).
- ◆ Thirty-six percent of the households that traveled to North Carolina in 2018 had a household income over \$100,000. The average household income for all visitors was \$85,450.
- ◆ In 2018, Charlotte (12.0%) was the top advertising market of origin for *all* travelers to the state, followed by Raleigh/Durham/Fayetteville (11.5%) Greensboro/High Point/Winston Salem (8.6%), Greenville-Spartanburg-Asheville (6.9%), Atlanta (5.4%), New York (4.0%), Washington, DC (3.7%), Greenville-New Bern-Washington (3.6%), Norfolk-Portsmouth-Newport News (3.4%), Wilmington (2.7%), and Richmond-Petersburg (1.9%).

2018 North Carolina Overnight Visitor Profile

Summary

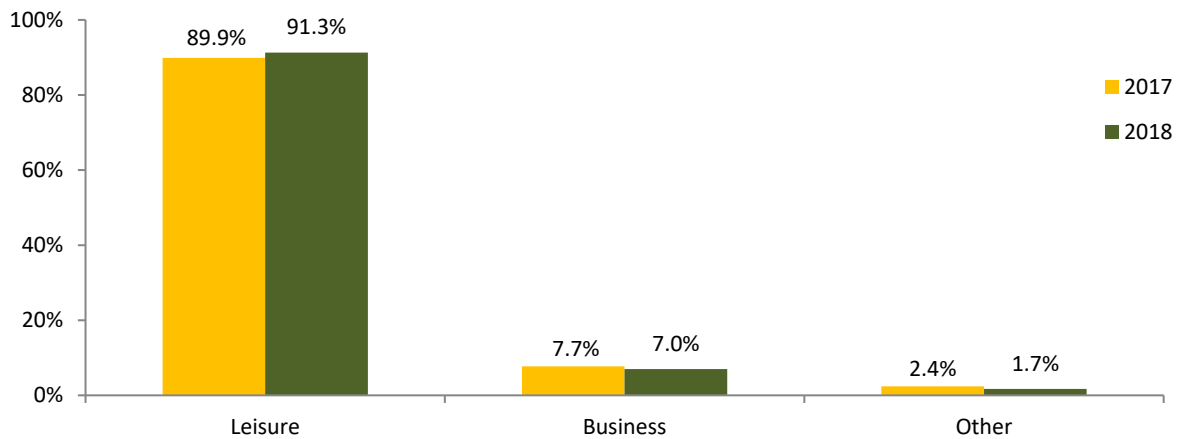
- ◆ In 2018, approximately 40 million overnight person-trips were taken in North Carolina. North Carolina ranked #7 in the US in terms of domestic overnight visitation.
- ◆ Ninety-one percent of all domestic overnight visitors came to North Carolina for leisure purposes, while seven percent of visitors 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-three percent of all overnights. Spring (March-May) followed with twenty-four percent of visitors. The fall (September-November) and winter (December-February) seasons saw twenty-three percent and twenty percent of annual visitors respectively. July was the largest month for overnight travel to the state with twelve percent, followed by June and August, with eleven and ten percent of overnight visitors respectively.
- ◆ Overnight visitors to North Carolina spent an average of 3.4 nights in the state in 2018.
- ◆ Forty-eight percent of North Carolina overnight visitors lodged in a hotel/motel, while thirty-four percent stayed in a private home. Eight percent stayed in a rental home or condo, while nearly four percent stayed in a personal second home or condo. Three percent stayed in an RV park or campground and approximately four 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 2.2 people. Thirty percent of overnight travel parties to the state included children in the party.
- ◆ Eighty-seven percent of overnight travelers to the state drove (includes personal automobile, rental, motorcycle and RV), while ten percent traveled by air.
- ◆ In 2018, the average household trip expenditure for overnight visitors was \$721. Resident overnight visitors spent an average of \$474 and out-of-state overnight visitors spent an average of \$853.
- ◆ The top states of origin of *overnight* visitors to North Carolina were in-state residents (34.4%), Virginia (9.3%), South Carolina (7.3%), Georgia (6.7%), Florida (5.4%), New York (4.2%), Pennsylvania (4.2%), Tennessee (3.7%), Ohio (3.3%), Maryland (2.7%) and New Jersey (2.2%).
- ◆ Just over half (54.2%) of the households that traveled overnight to North Carolina in 2018 had a household income over \$75,000, and more than a third (40.3%) of them had an income of over \$100,000. The average annual income of overnight visitors to the state was \$90,310.
- ◆ In 2018, Charlotte (10.8%) was the top advertising market of origin for *overnight* travelers to the state, followed by Raleigh/Durham/Fayetteville (10.6%), Greenville-Spartanburg-Asheville (6.0%), Atlanta (6.0%), Greensboro/High Point/Winston Salem (5.5%), New York (5.2%), Washington, DC (4.7%), Norfolk-Portsmouth-Newport News (2.6%), Philadelphia (2.3%), Richmond-Petersburg (2.2%) and Greenville-New Bern-Washington (2.0%).

North Carolina Overnight Visitor Profile

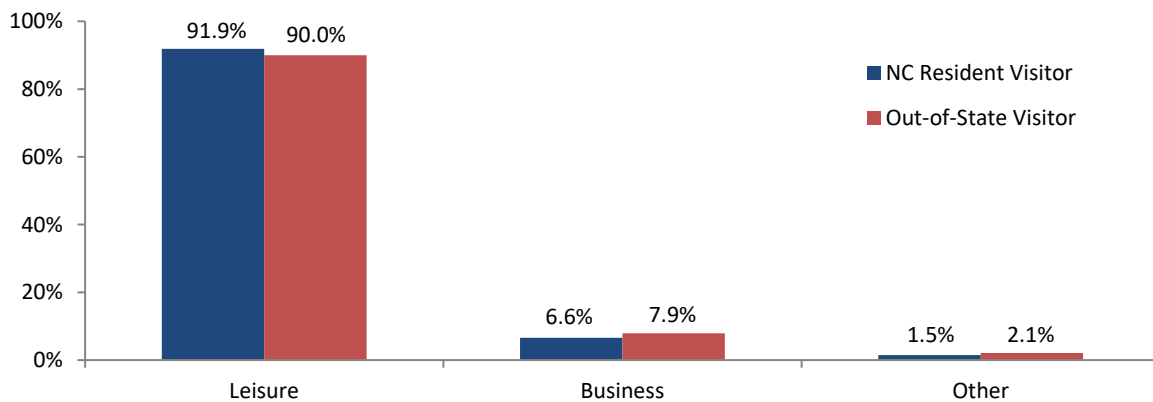
Main Purpose of Visit

In 2018, more than ninety percent of domestic overnight visitors came to North Carolina for leisure purposes, which included visiting friends and relatives, outdoor recreation and entertainment/sightseeing. Seven percent of overnight visitors came for general business, convention, seminar or other group meeting, while less than two 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 more than ninety percent in 2018.

Primary Purpose of Overnight Trip to North Carolina



**2018 Primary Purpose of Overnight Trip
NC Resident Vs. Out-of-State Visitor**

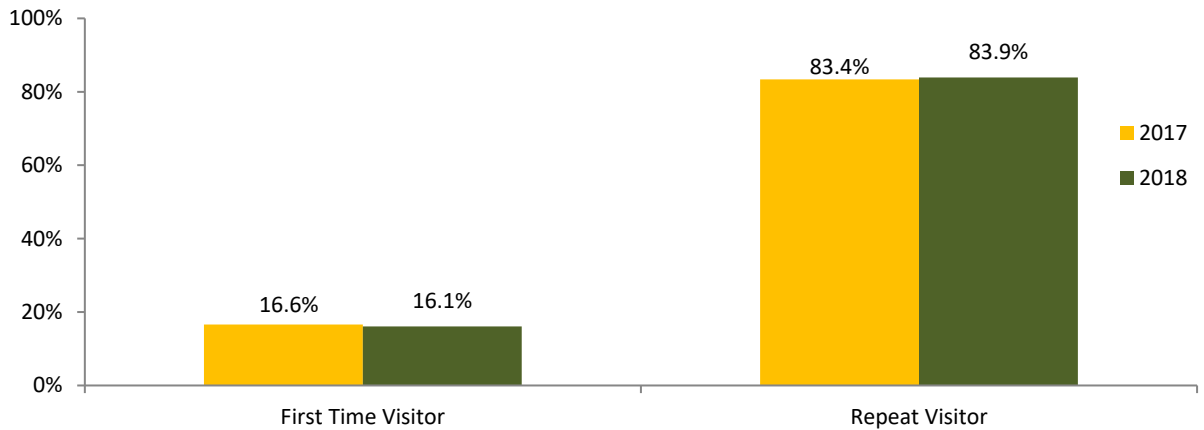


Both resident and out-of-state visitors are much more likely to visit the state for leisure purposes than for other reasons, with in-state visitors nearing ninety-two percent. Ninety percent of out-of-state overnight travelers to North Carolina in 2018 were leisure visitors. Nearly eight percent of out-of-state visitors in 2018 indicated that their primary purpose of visit was business, while over six percent of resident visitors were traveling in the state for business.

First Time Visitors

In 2018, more than sixteen percent of out-of-state overnight visitors were first time visitors to the state. More than half (57.5%) have visited more than three times in the last 5 years.

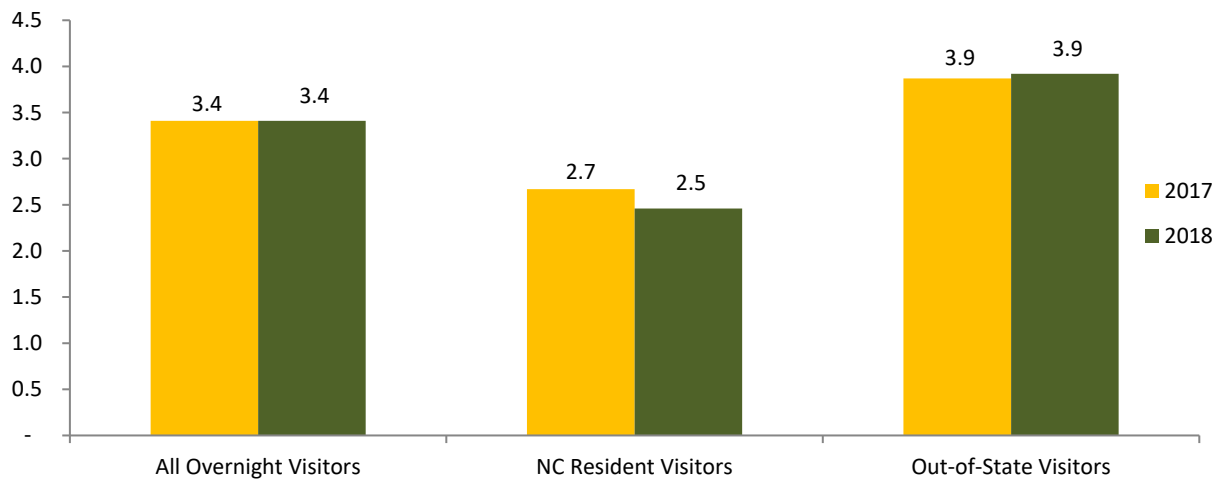
2018 First Time Out-of-State Overnight Visitors to North Carolina



Average Length of Stay

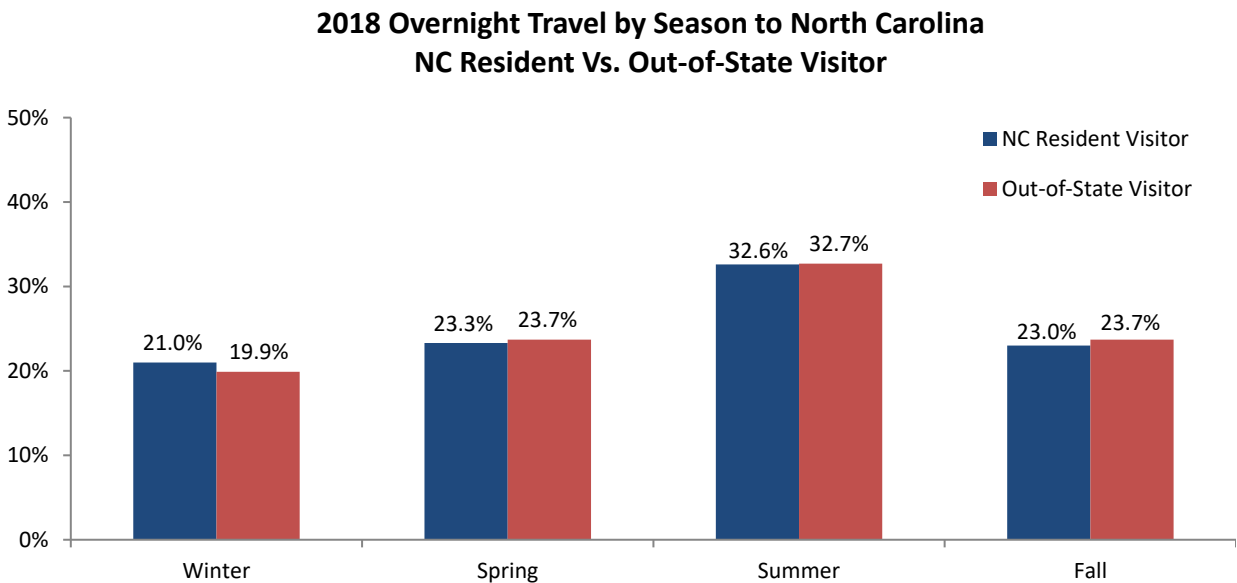
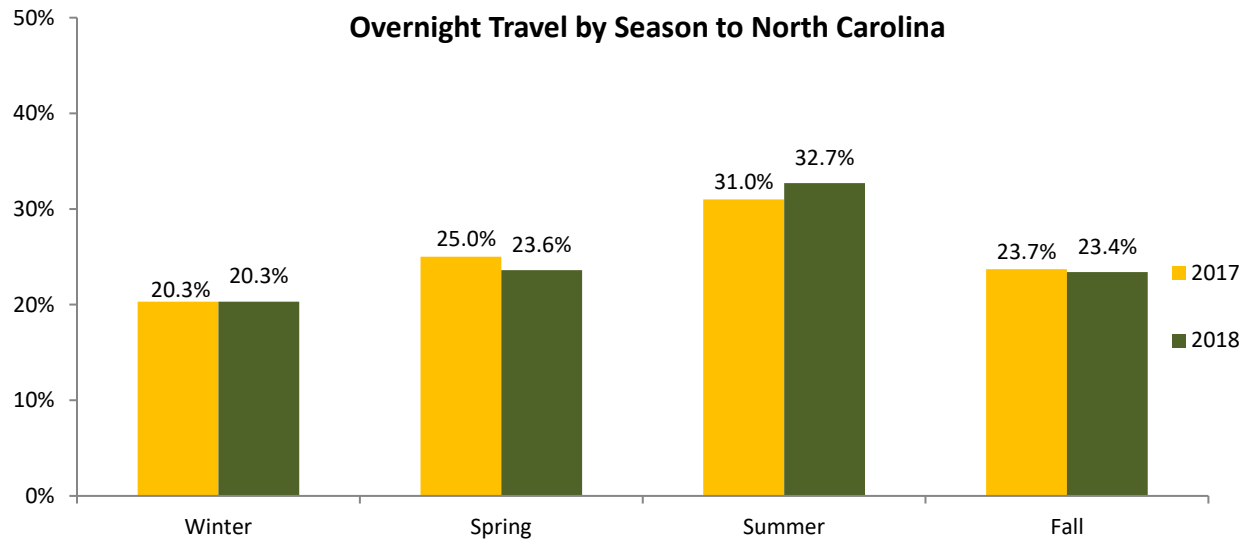
The average length of stay for overall North Carolina visitors did not change from 2017 to 2018, though resident travel length of stay decreased somewhat last year.

Average Length of Stay for Overnight Visitors to North Carolina



Travel Volume by Season

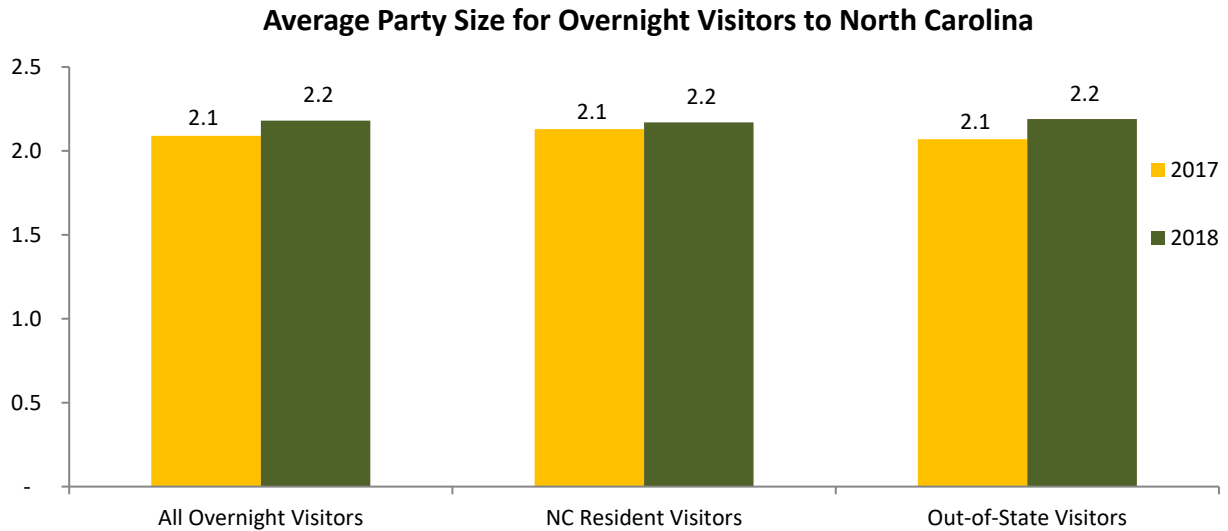
When examining overnight visitation based on the typical seasonal schedule, the summer (June through August) with thirty-three percent was the most popular season for overnight travel to North Carolina. Spring (March through May) was the next most popular travel season (24%) for overnighters, followed by fall (September through November) with twenty-three 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 only 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 up slightly from 2017 to 2018, with an average of 2.2 persons per travel party. The average party size for resident travelers and out-of-state visitors was the same.

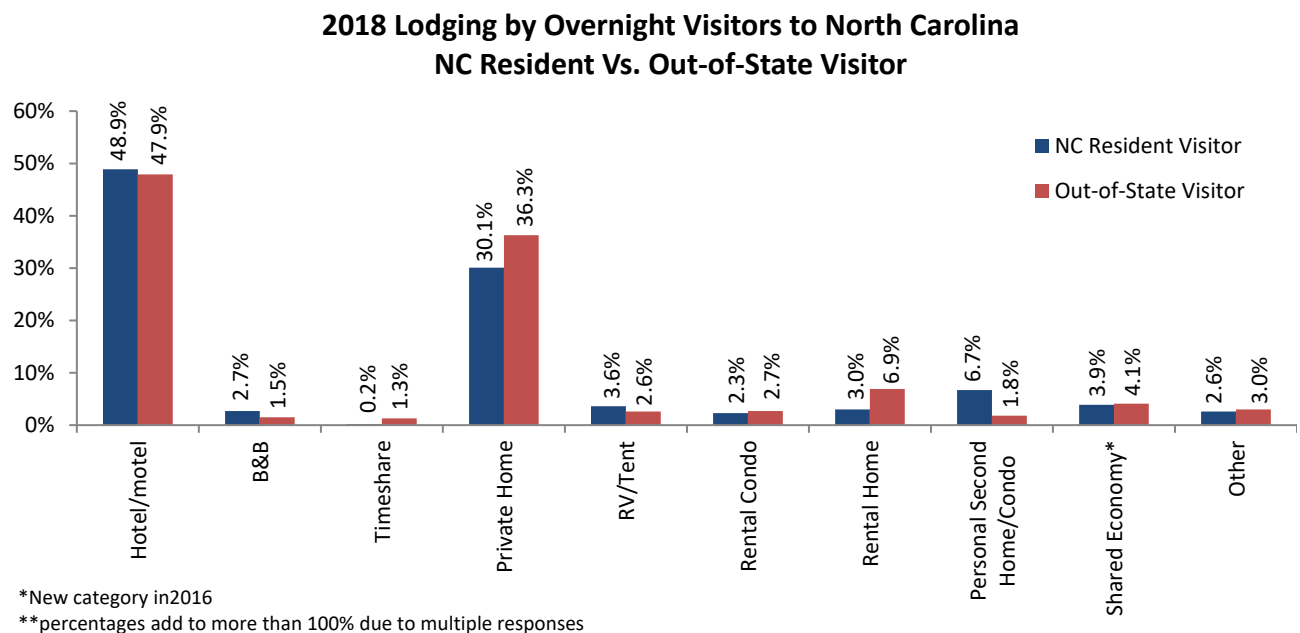
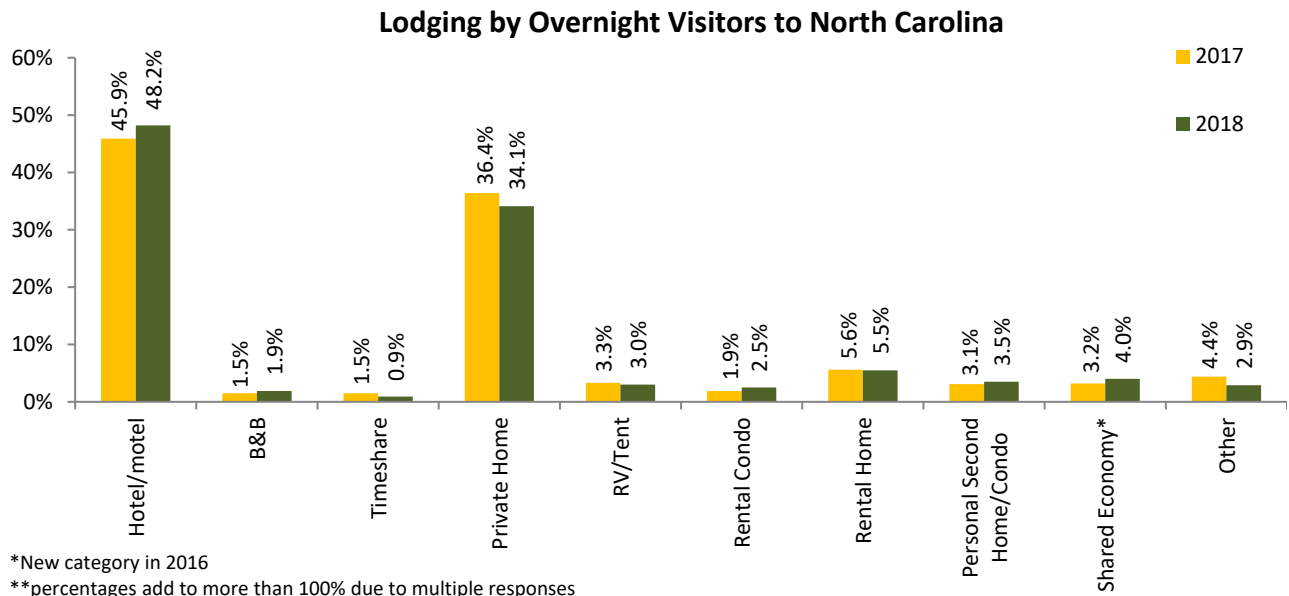


Children on Trip

Thirty percent of all overnight visitor parties to North Carolina included children, up from twenty-six percent in 2017. The average number of children on trips was 1.8. Out-of-state visitor parties were more likely to include children than resident visitor parties (31% vs. 28%).

Lodging Used in North Carolina

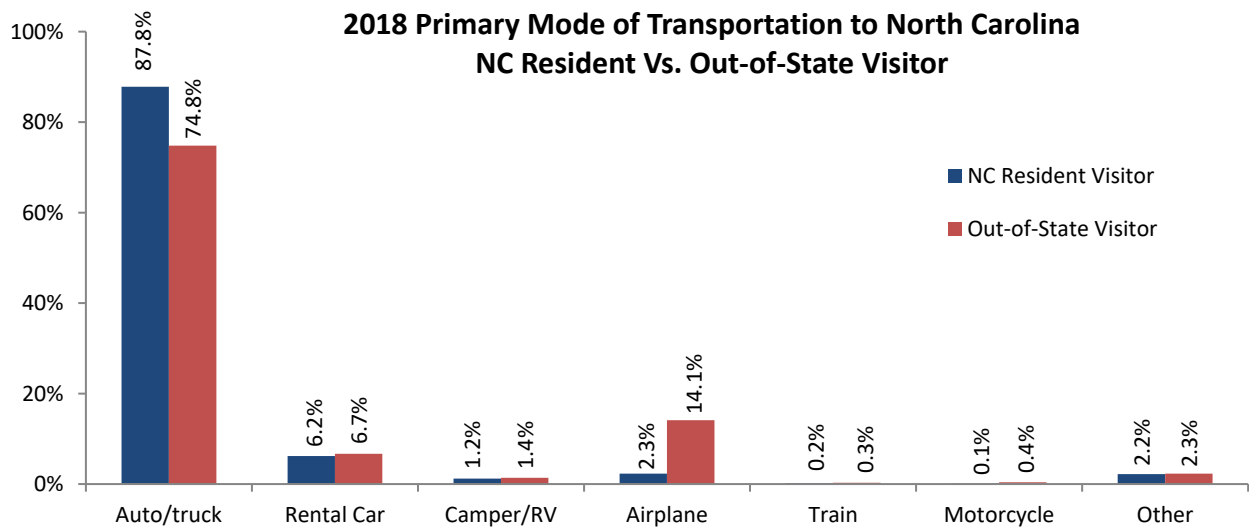
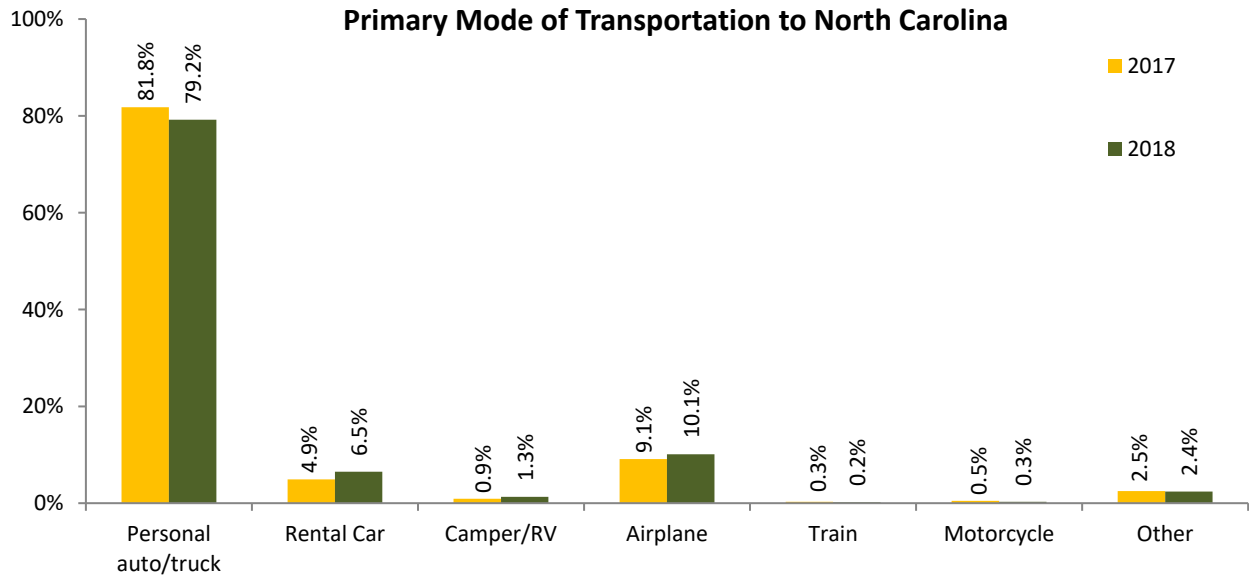
In 2018, forty-eight percent of North Carolina visitors lodged in a hotel/motel, up from forty-six percent in 2017. Thirty-four percent stayed in a private home, down slightly from 2017. Visitors using shared economy lodging properties increased from three to four percent in 2018.



Out-of-state visitors in 2018 were more likely to have stayed in a private home or rental home as accommodations than resident visitors. 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 (79.2%), while about ten percent travel by air.

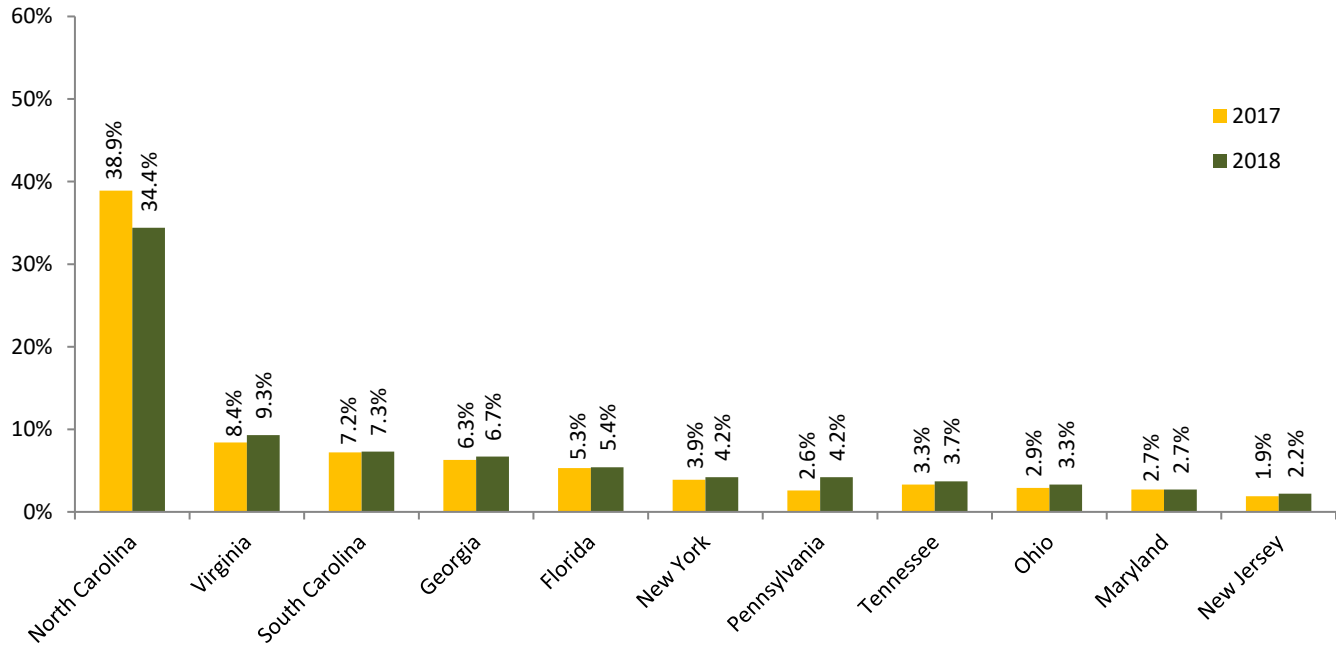


Not surprisingly, NC resident visitors are more likely to use their own automobile as primary transportation for overnight travel within the state than out-of-state visitors. While out-of-state visitors also primarily drive to North Carolina, they are more likely to fly than resident visitors.

Origin of Visitors

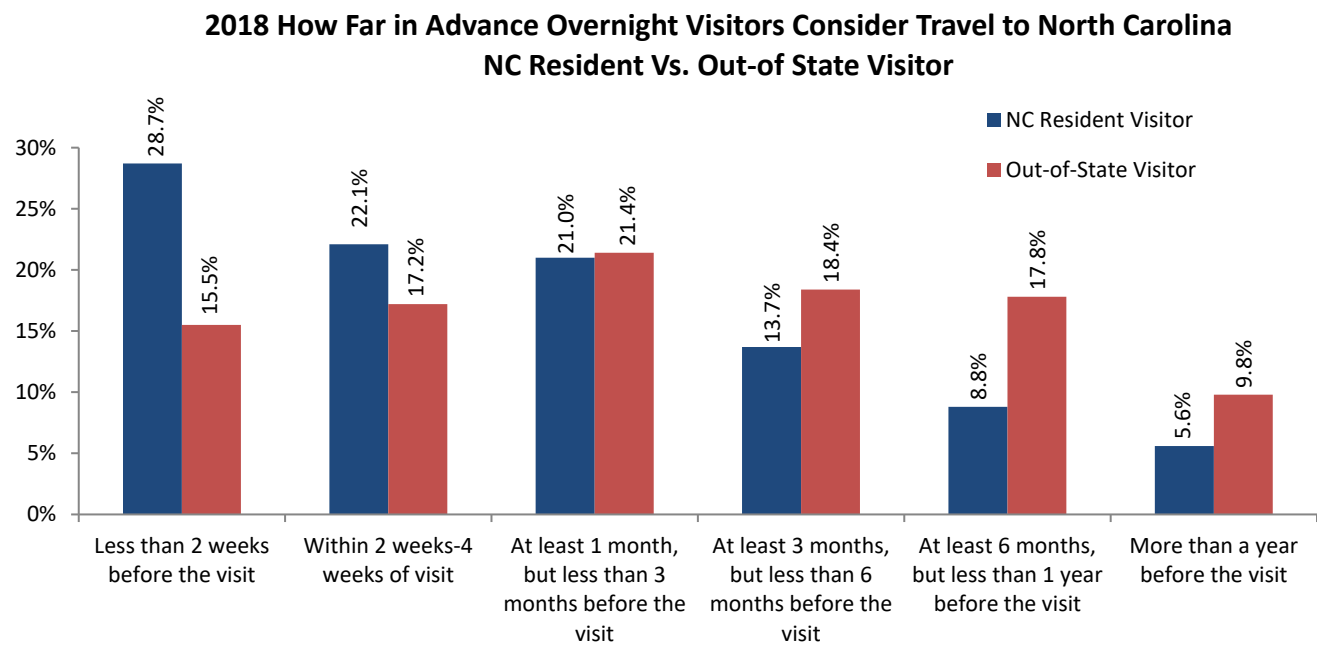
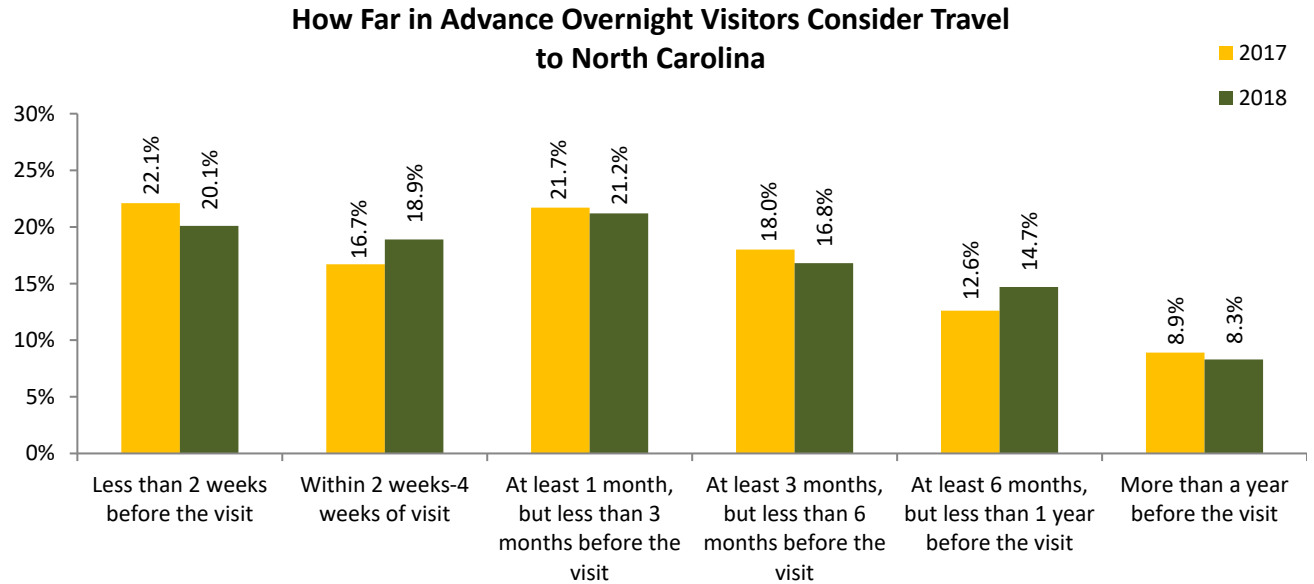
In 2018, the top states of origin for North Carolina overnight visitors included North Carolina (34.4%), Virginia (9.3%), South Carolina (7.3%), Georgia (6.7%), Florida (5.4%) and New York (4.2%). The in-state visitor proportion to total visitors decreased in 2018, but nine of the top ten out-of-state markets increased in proportion from 2017 to 2018. The top ten out-of-state markets represent forty-nine percent of North Carolina overnight visitors.

Top States of Origin of Overnight Visitors to North Carolina



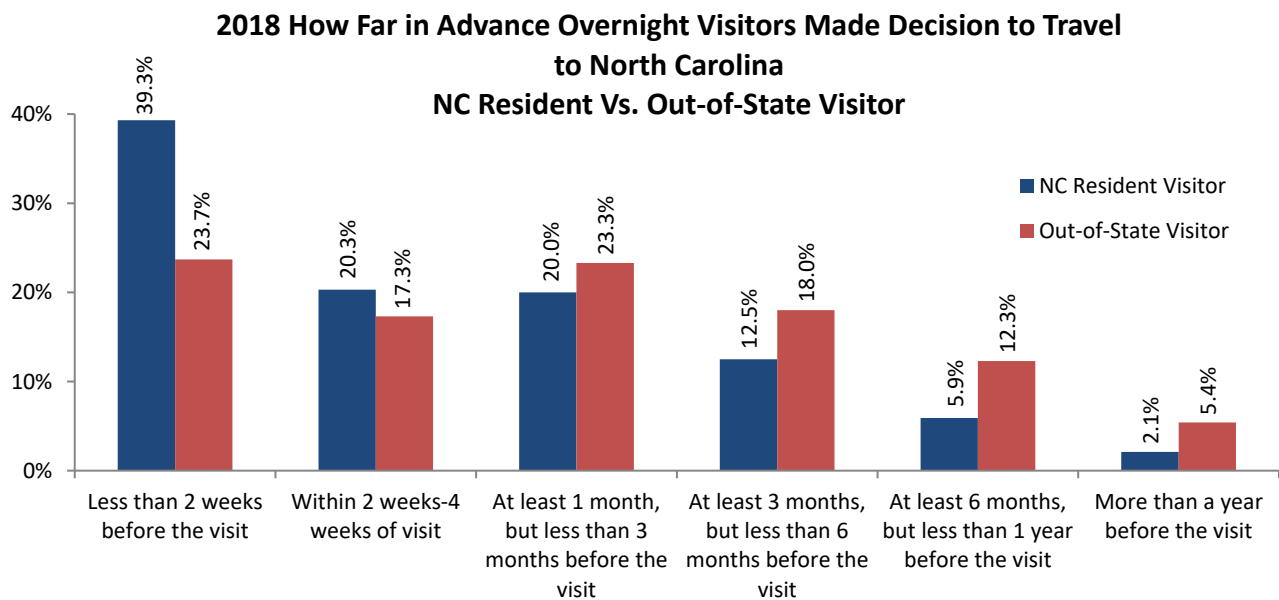
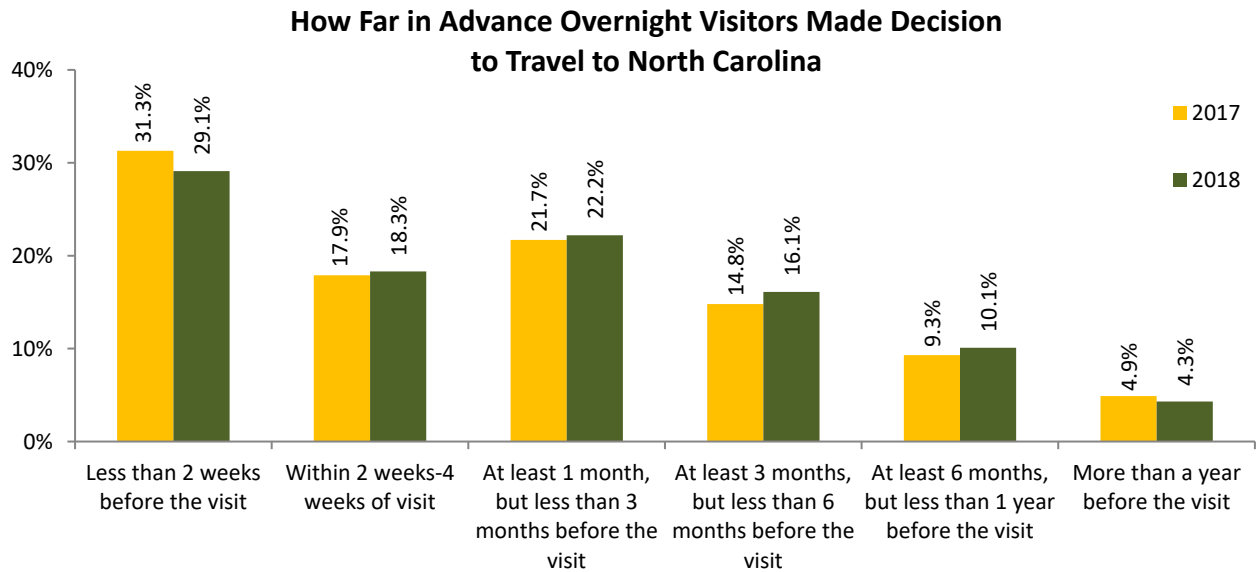
Trip Planning

Nearly a quarter (23%) of 2018 overnight visitors considered North Carolina for a visit at least six months before the visit and eight percent considered the state more than a year before visiting. Consideration time for travel to the state was similar in 2018 to 2017.



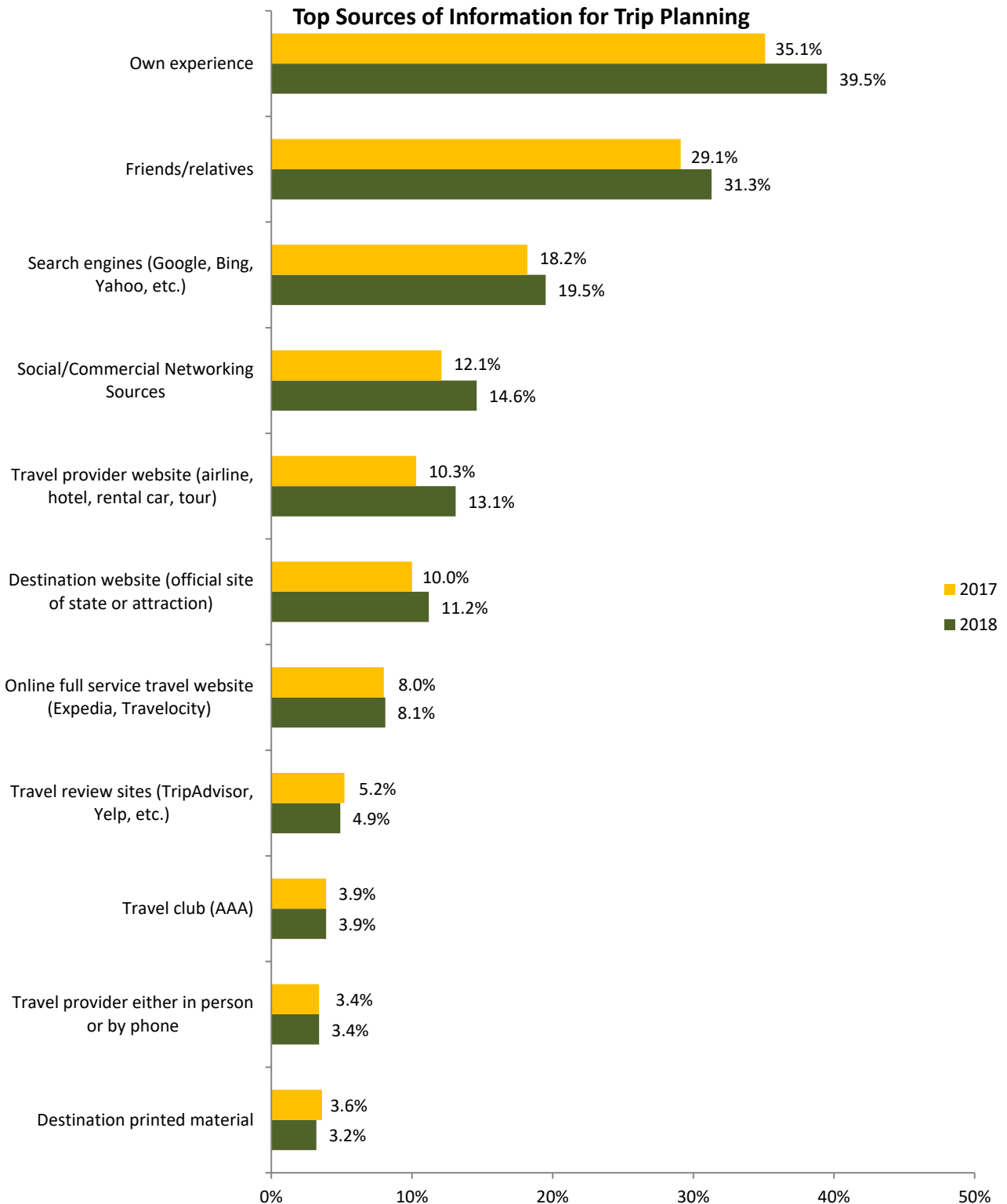
Resident visitors are nearly twice as likely to have North Carolina in the “consideration” set less than two weeks before visiting as out-of-state visitors. Out-of-state visitors are twice as likely to consider North Carolina more than six months prior to travel.

Just over fourteen percent of overnight visitors in 2018 made the decision to visit the state at least six months prior to the visit, while twenty-nine percent of overnight visitors made the decision within two weeks of visiting.

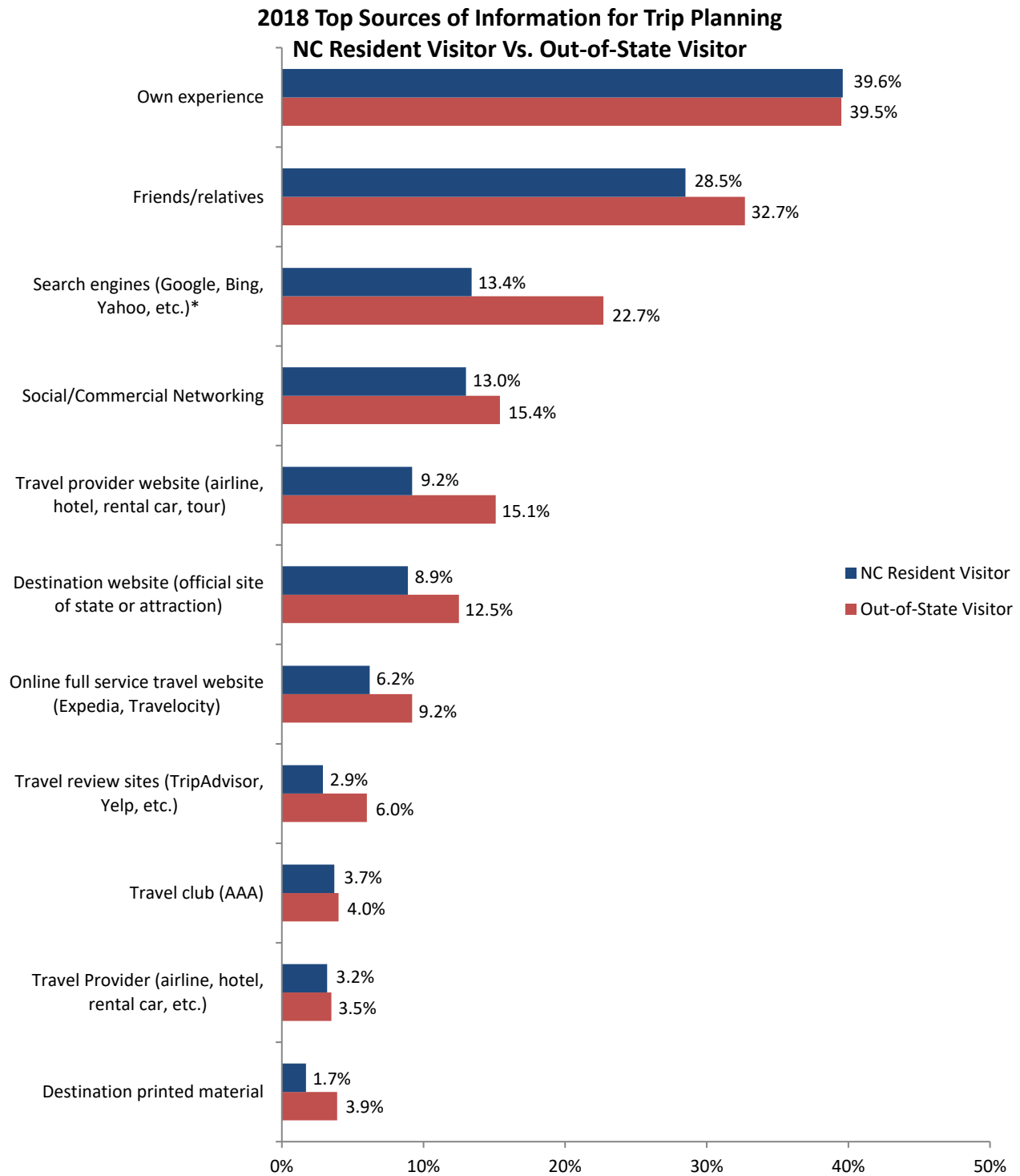


Resident visitors are nearly twice as likely to make the decision to visit North Carolina within two weeks of travel than out-of-state visitors. Thirty-six percent of out-of-state visitors decide to visit at least three months prior to visit, while eighteen percent of resident visitors decide to visit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

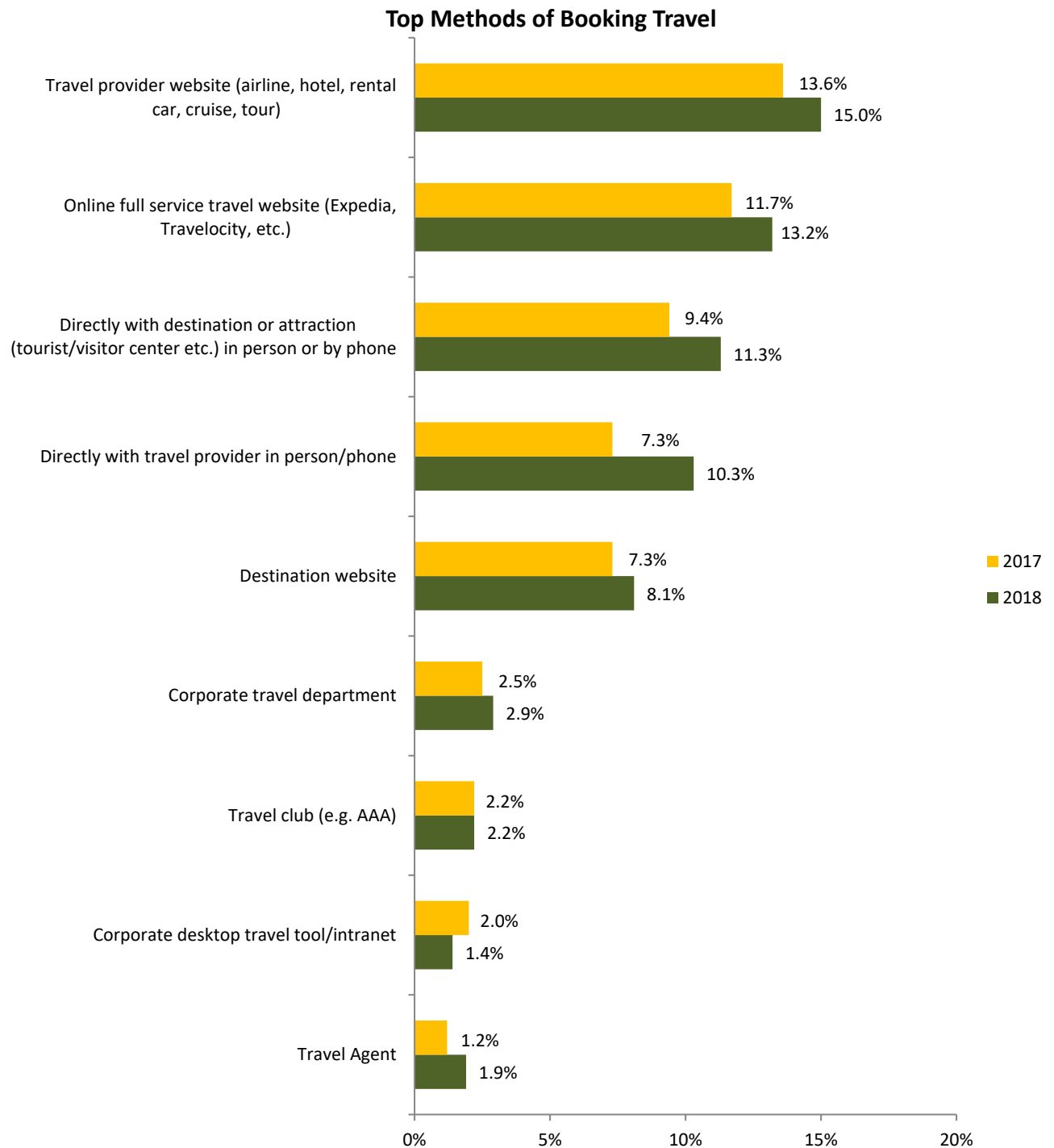
The largest proportion of overnight visitors to North Carolina used their own experience, friends/relatives, search engines and social networking to plan their trips. The proportions of visitors who used these top methods increased in 2018 from 2017, in addition to travel provider websites and destination websites.



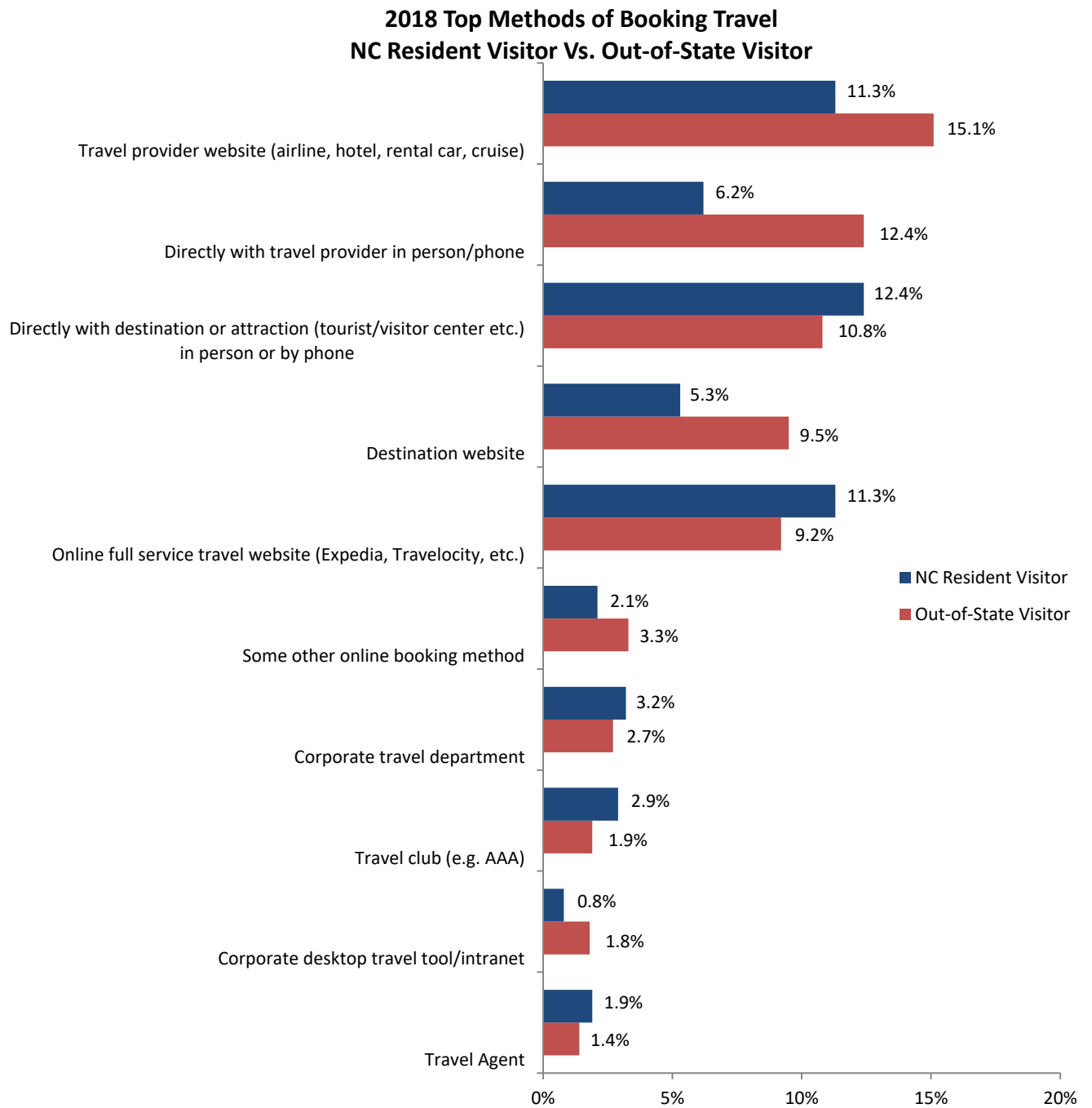
Out-of-state visitors tend to use more sources of information overall than resident visitors. In particular, they are more likely to rely on friends/relatives, search engines, social networking, travel provider and destination websites than resident visitors within North Carolina.



Overnight visitors in 2018 used more methods of booking travel than in 2017. Most often used were travel provider websites, online full-service travel website and directly with destinations/attractions.

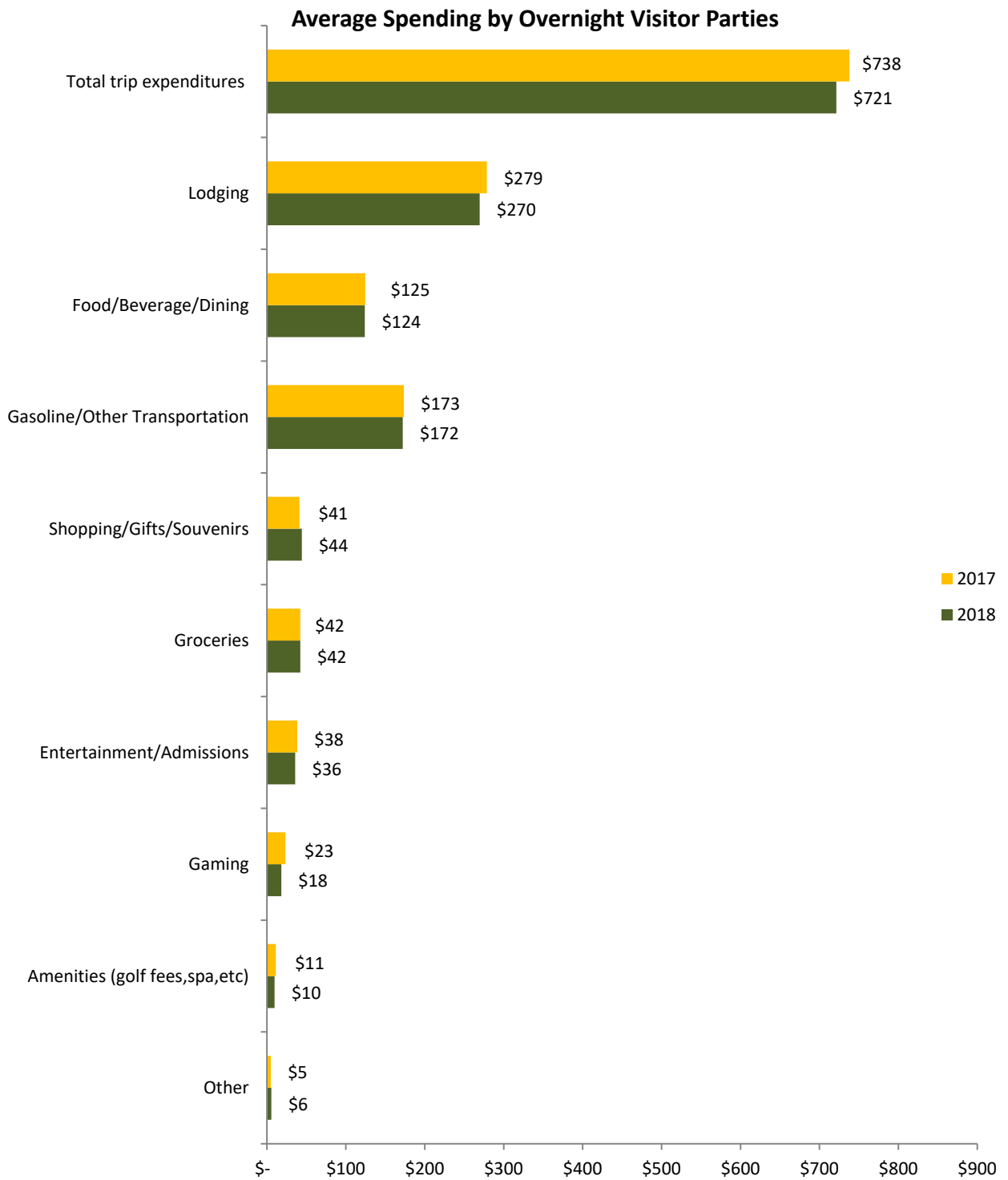


Out-of-state visitors are much more likely to use travel provider websites, directly contact travel providers and use destination website than resident travelers.



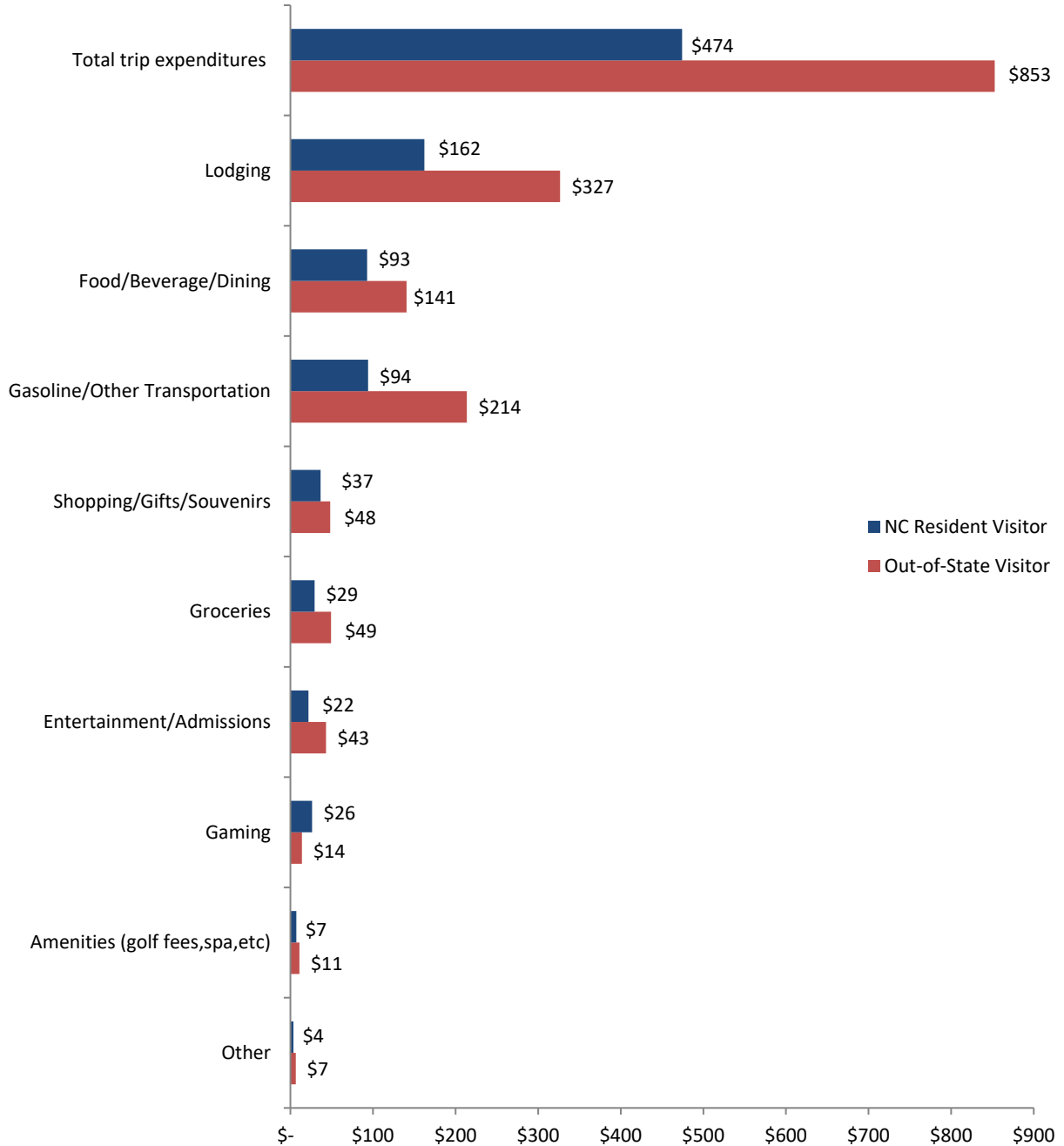
Expenditures by North Carolina Visitors

The average overnight visitor party spending in the state was \$721, down from \$738 in 2016.



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

2018 Average Spending by Overnight Visitor Parties NC Resident Visitor Vs. Out-of-State Visitor



Activities

More than one-fourth (28%) of 2018 overnight visitors to North Carolina spent time with relatives and shopped (27%) while in the state. Eighteen percent of overnighters visited a beach while sixteen percent visited friends while traveling overnight in North Carolina. Activities that showed largest increases in the proportion of overnight visitors participating from 2017 to 2018 included beach (+3 percentage points), local/folk arts/crafts (+2 percentage points) and nightclub/dancing (+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	2018	2017	Activity	2018	2017
Visiting Relatives	28%	31%	Special Events/Festivals	3%	3%
Shopping	27%	26%	Theater/Drama	2%	1%
Beach	18%	15%	Biking/Road Biking/Cycling	2%	2%
Visiting Friends	16%	15%	Sport Event- Youth/Amateur/Collegiate/Other(Spectator)	2%	2%
Fine Dining	14%	13%	Spa/Health Club	2%	2%
Rural Sightseeing	14%	15%	Theme Park/Amusement Park/Water Park	2%	2%
Historic Sites/Churches	12%	11%	Sport Event- Youth/Amateur/Collegiate/Other(Participant)	2%	1%
State Park/Monument/Recreation area	8%	10%	Rafting/Kayaking/Canoeing/Paddleboarding	2%	2%
Urban Sightseeing	8%	8%	Native American ruins/Rock art	1%	1%
Museums	8%	9%	Motorboat/Jet ski	1%	1%
Hiking/Backpacking	7%	7%	Musical Theater	1%	1%
Wildlife Viewing	7%	7%	ATV/Four-wheeling	1%	1%
Craft Breweries	7%	6%	Horseback riding	1%	1%
Local/folk arts/crafts	6%	4%	Sports events – Major/Professional	1%	1%
National Park/Monument/Recreation area	6%	6%	Area where a TV show or movie was filmed	1%	1%
Fishing	5%	5%	Mountain Biking	1%	1%
Old Homes/Mansions	5%	5%	Distilleries	1%	1%
Gardens	5%	5%	Farms/Ranches/Agri-tours	1%	1%
Nightclubs/Dancing	5%	3%	Tennis	1%	<1%
Zoos/Aquariums/Aviaries	4%	3%	Caverns	1%	1%
Art Galleries	4%	3%	Motor Sports	1%	1%
Musical performance/show	4%	3%	Water skiing	1%	1%
Wine Tasting/Winery Tour	4%	4%	Hunting	1%	1%
Golf	4%	3%	Hang gliding/sky diving/base jumping	1%	<1%
Other nature (photography, rockhounding, etc.)	4%	3%	Sailing	1%	<1%
Casino/Gaming	4%	4%	Skiing/snowboarding	1%	1%
Nature Travel/Eco-touring	3%	3%	Symphony/opera/concert	<1%	1%
Bird Watching	3%	2%	Rock/Mountain climbing	<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, shop, participate in fine dining, go to museums, go urban sightseeing and visit national parks than resident visitors.

Activities Participated in by 2018 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	24%	31%	Special Events/Festivals	2%	3%
Shopping	25%	29%	Theater/Drama	2%	3%
Beach	19%	18%	Biking/Road Biking/Cycling	2%	3%
Fine Dining	10%	17%	Spa/Health Club	1%	2%
Visiting Friends	17%	15%	Rafting/Kayaking/Canoeing/ Paddleboarding	1%	2%
Rural Sightseeing	13%	14%	Theme Park/Amusement Park/Water Park	2%	2%
Historic Sites/Churches	11%	12%	Motorboat/Jet ski	1%	2%
Museums	6%	9%	Native American ruins/Rock art	1%	2%
Urban Sightseeing	6%	9%	Sport Event-Youth/Amateur/ Collegiate/Other(Spectator)	3%	1%
State Park/Monument/Recreation area	7%	8%	ATV/Four-wheeling	1%	1%
Wildlife Viewing	5%	8%	Horseback riding	1%	1%
Hiking/Backpacking	6%	8%	Sport Event-Youth/Amateur/ Collegiate/Other (Participant)	3%	1%
Craft Breweries	7%	7%	Sports events – Major/Professional	1%	1%
National Park/Monument/Recreation area	3%	7%	Distilleries	1%	1%
Local/folk arts/crafts	5%	6%	Area where a TV show or movie was filmed	1%	1%
Old Homes/Mansions	3%	6%	Caverns	1%	1%
Fishing	5%	6%	Musical Theater	2%	1%
Nightclubs/Dancing	3%	5%	Mountain biking	1%	1%
Golf	2%	5%	Motor Sports	1%	1%
Zoos/Aquariums/Aviaries	4%	5%	Water-skiing	1%	1%
Nature Travel/Eco-touring	1%	4%	Farms/Ranches/Agri-tours	1%	1%
Wine Tasting/Winery Tour	4%	4%	Rock/Mountain climbing	<1%	1%
Gardens	6%	4%	Sailing	<1%	1%
Other nature (photography, rockhounding, etc.)	3%	4%	Skiing/snowboarding	<1%	1%
Art Galleries	5%	4%	Tennis	2%	1%
Musical performance/show	6%	4%	Hunting	1%	1%
Casino/Gaming	4%	3%	Rodeo/State Fair	<1%	1%
Bird Watching	3%	3%			

Demographic Profile of North Carolina Overnight Visitors

Nearly two-thirds (64.6%) 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 (85%), both resident (84%) and out-of-state (86%), classify themselves as white. More than eight percent classify themselves as black/African American, up from six percent in 2017. Three percent of overnight visitors self-report their ethnicity is Asian/Pacific Islander.

More than two-thirds (69.5%) of North Carolina overnight visitor parties have a household head with a college degree or higher. The average overnight visitor is 46 years old. The NC resident overnight visitor is slightly younger (45 years old) than the out-of-state overnight visitor (47 years old).

The average household income of overnight visitors to North Carolina in 2018 was \$90,310, up slightly from \$88,620 in 2017. More than half of overnight visitors in 2018 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 \$83,250 in 2018, while the average household income of out-of-state overnight visitors was \$93,900.

Sixty-four percent of overnight visitor parties reported that the head of household is employed, while twenty-one percent are retired. The remainder reported "not employed" as work status. Out-of-state visitors (23%) are more likely to be retired than resident visitors (16%).

The average household size of a North Carolina overnight visitor party in 2018 was 2.7.

2018 Top Advertising Markets

In 2018, the top advertising markets sending overnight visitors to **North Carolina** were Charlotte (10.8%), Raleigh-Durham-Fayetteville (10.6%), Greenville-Spartanburg-Asheville (6.0%), Atlanta (6.0%), Greensboro-Winston-Salem-High Point (5.5%), New York (5.2%) and Washington DC (4.7%). Advertising markets correspond with Nielsen's Designated Market Areas (DMAs).

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

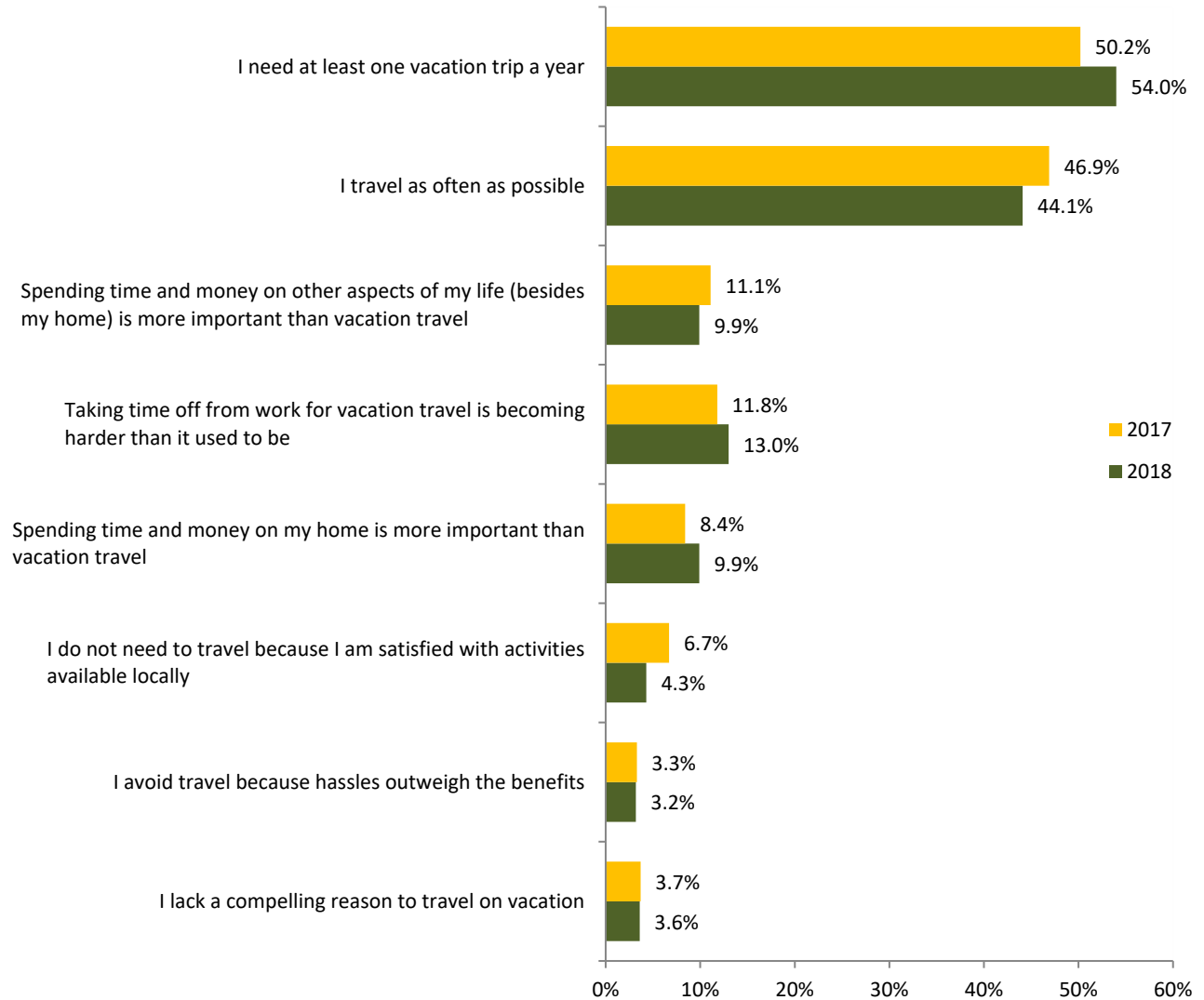
DMA of Origin	2018 Percentage of Total Overnight Visitors	2017 Percentage of Total Overnight Visitors
Charlotte	10.8%	10.7%
Raleigh-Durham (Fayetteville)	10.6%	12.6%
Greenville-Spartanburg-Asheville-Anderson	6.0%	4.0%
Atlanta	6.0%	5.7%
Greensboro-Winston Salem-High Point	5.5%	6.6%
New York, NY	5.2%	2.9%
Washington DC (Hagerstown, MD)	4.7%	3.8%
Norfolk-Portsmouth-Newport News	2.6%	3.7%
Philadelphia, PA	2.3%	2.3%
Richmond-Petersburg, VA	2.2%	2.1%
Greenville-New Bern-Washington	2.0%	2.7%
Tampa-St. Petersburg (Sarasota)	1.7%	1.0%
Wilmington	1.6%	2.4%
Myrtle Beach-Florence	1.6%	1.3%
Knoxville	1.6%	1.0%
Columbia, SC	1.5%	1.8%
Roanoke-Lynchburg	1.5%	0.9%
Tri-Cities, TN-VA	1.5%	0.8%
Nashville	1.4%	1.2%
Orlando-Daytona Beach-Melbourne	1.3%	1.3%
Baltimore	1.2%	1.5%
Charleston-Huntington	1.1%	0.8%
Columbus, OH	1.1%	0.7%
Jacksonville	0.9%	0.8%
West Palm Beach-Ft. Pierce	0.9%	0.5%
Charleston, SC	0.8%	1.2%

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

Vacation Attitudes

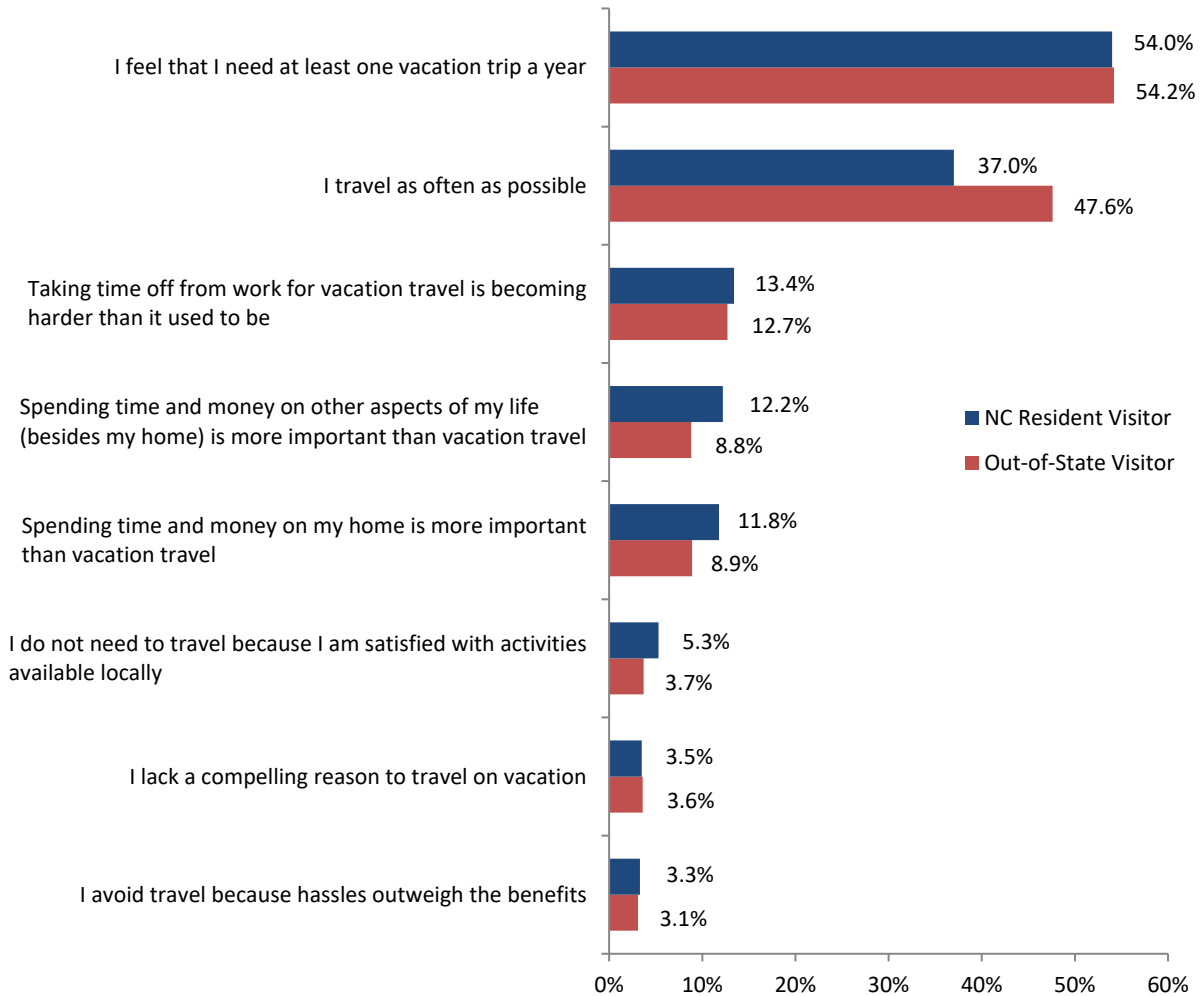
More than half of North Carolina overnight visitors feel they need at least one vacation a year and nearly half also indicate that they travel as often as possible.

Current Feelings Concerning Vacation Travel



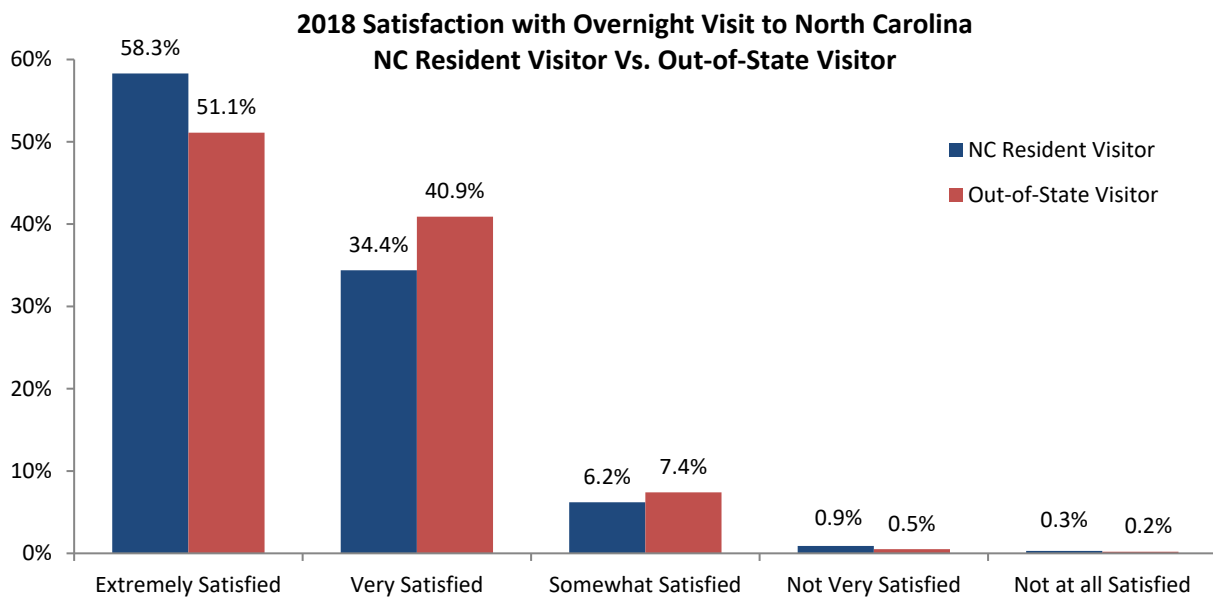
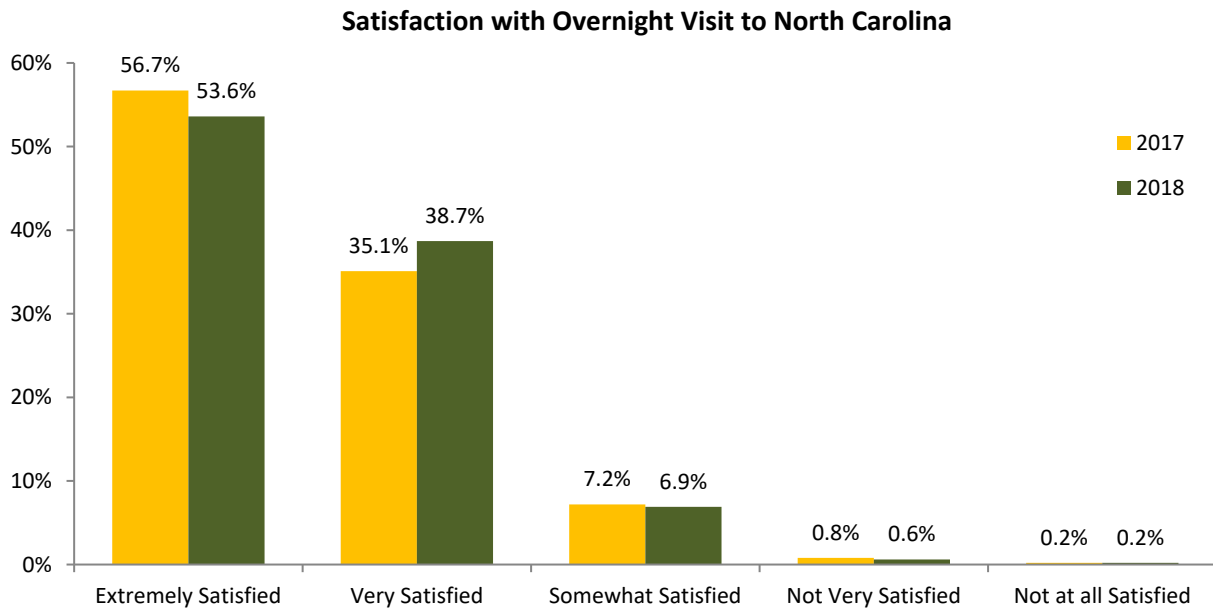
North Carolina out-of-state visitors are more likely to report that they travel as often as possible. Resident visitors more often note that they don't need to travel because of satisfaction with activities locally.

**2018 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 2018 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.



2018 North Carolina Daytrip Visitor Profile

Summary

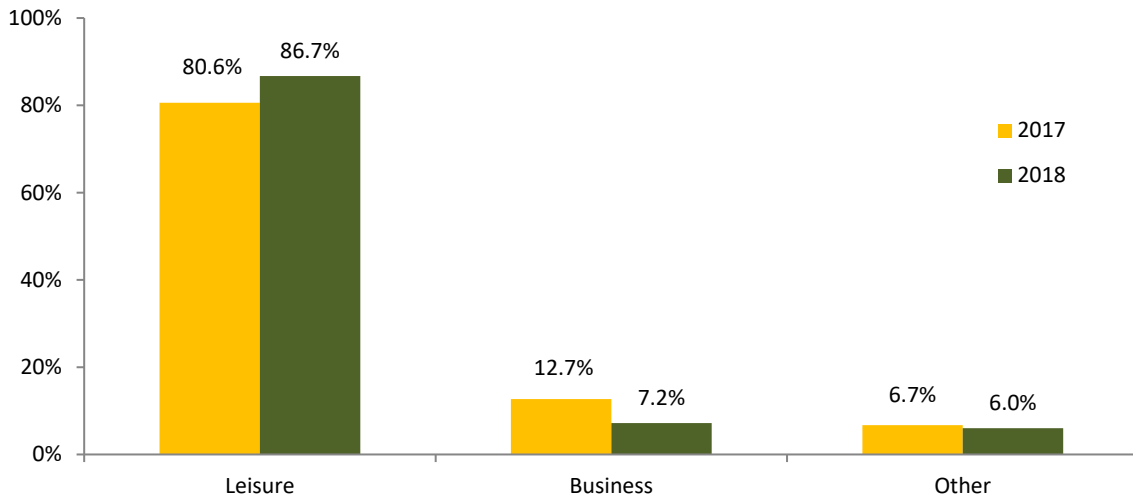
- ◆ In 2018, approximately 11 million daytrips were taken in North Carolina. North Carolina ranked #7 in the US in terms of daytrip visitation. A daytripper is defined as a visitor who did not spend any nights away from home, but traveled at least 50 miles one-way from home.
- ◆ Eighty-seven percent of all daytrippers visited North Carolina for pleasure purposes, while seven 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-seven percent of all 2018 daytrippers, followed by spring (March-May) with twenty-six percent, summer (June - August) with twenty-four percent and winter (December-February) with twenty-three percent. October was the single largest month for day travel to the state with nearly eleven percent, followed by April with nine percent.
- ◆ The average travel party size for daytrip visitor parties to North Carolina was 2.0 people. Twenty-nine percent of travel parties to the state included children in the party.
- ◆ Ninety-five percent of daytrippers to the state drove (includes personal automobile, rental, motorcycle and RV).
- ◆ In 2018, the average household trip expenditure for daytrip parties to the state was approximately \$203 per visit.
- ◆ The top states of origin of *daytrippers* to North Carolina were in-state residents (66.2%), and the nearby states of South Carolina (12.1%), Georgia (5.6%), Virginia (4.7%), Tennessee (1.9%) and Florida (1.5%).
- ◆ More than half (57.4%) of the households that traveled to North Carolina on a daytrip in 2018 had a household income over \$50,000.
- ◆ In 2018, Greensboro/High Point/Winston Salem (15.7%) was the top advertising market of origin for *daytrippers* to the state, followed by Charlotte (14.6%), Raleigh/Durham/Fayetteville (13.6%) Greenville-Spartanburg-Asheville (8.9%), and Greenville-New Bern-Washington (7.4%).

North Carolina Daytrip Visitor Profile

Main Purpose of Visit

In 2018, nearly eighty-seven 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 decreased from nearly thirteen percent in 2017 to seven percent in 2018.

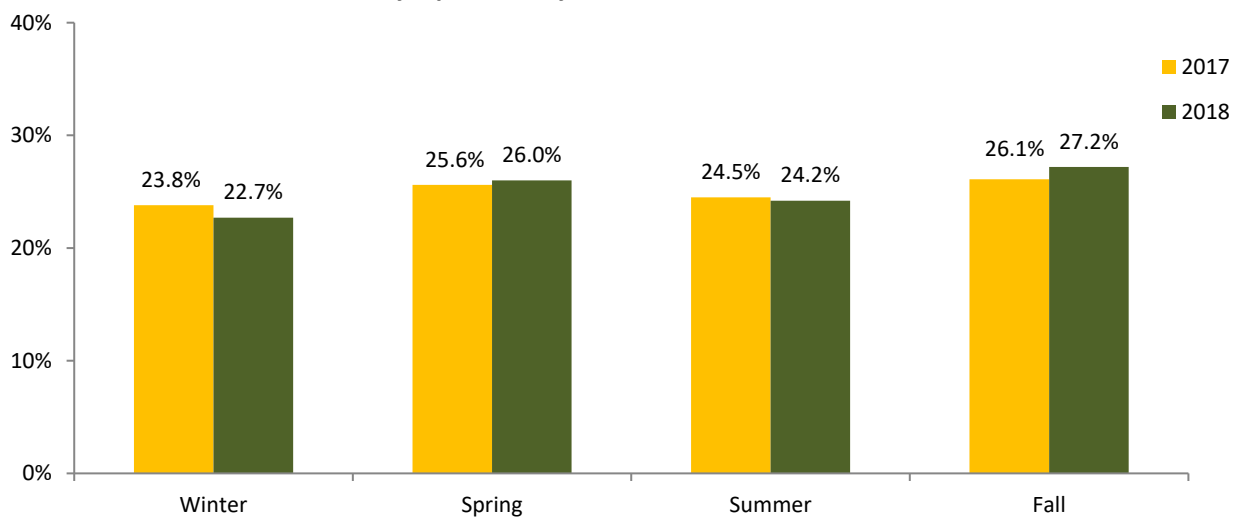
Primary Purpose of Daytrip to North Carolina



Travel Volume by Season

The seasonal travel patterns for daytrippers to and within North Carolina remained consistent from 2017 to 2018. The fall season sees slightly more daytrippers than other seasons.

Daytrip Travel by Season to North Carolina



Travel Party Size

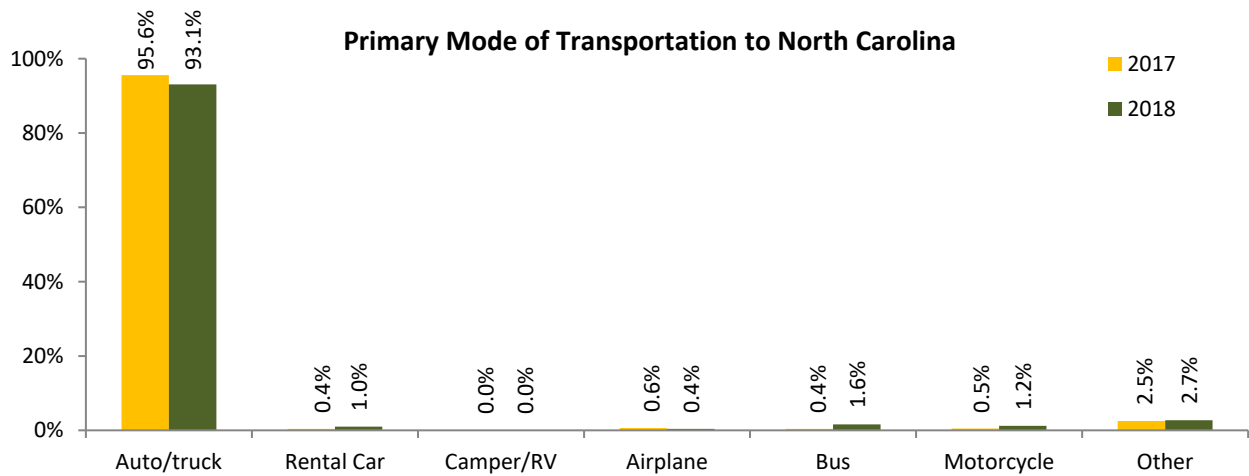
The average travel party size for North Carolina daytrippers in 2018 was 2.0 people.

Children on Trip

Nearly twenty-nine percent of daytrip parties to North Carolina included children. Among those who traveled with children, the average number of children on trips was 1.8.

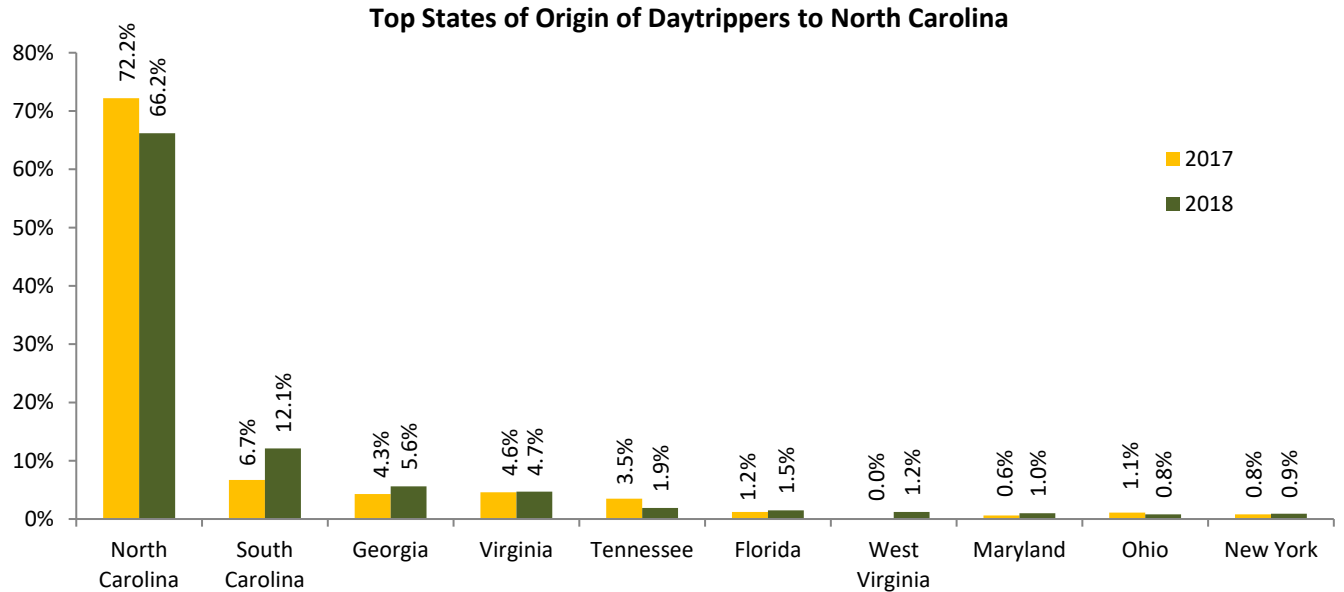
Mode of Transportation

The primary mode of transportation by daytrippers to North Carolina is the personal auto (93.1%), while less than seven percent of daytrippers choose an alternate form of transportation.



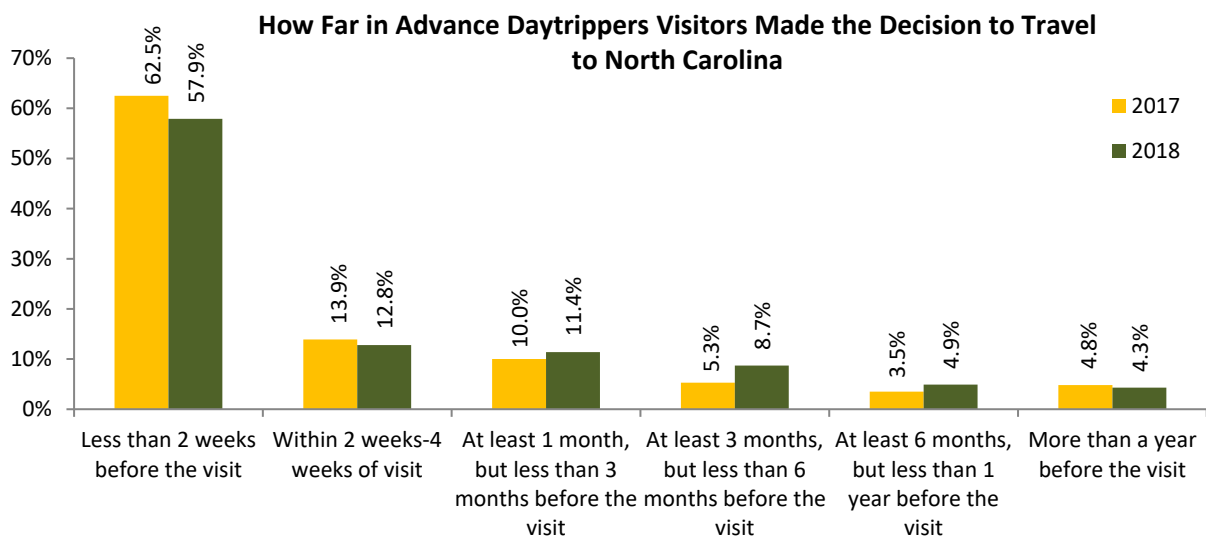
Origin of Visitors

As expected, the top states of origin for North Carolina daytrippers in 2018 were residents and those from nearby states; North Carolina (66.2%), South Carolina (12.1%), Georgia (5.6%) and Virginia (4.7%). Daytrippers from South Carolina increased from nearly seven percent in 2017 to more than twelve percent in 2018.

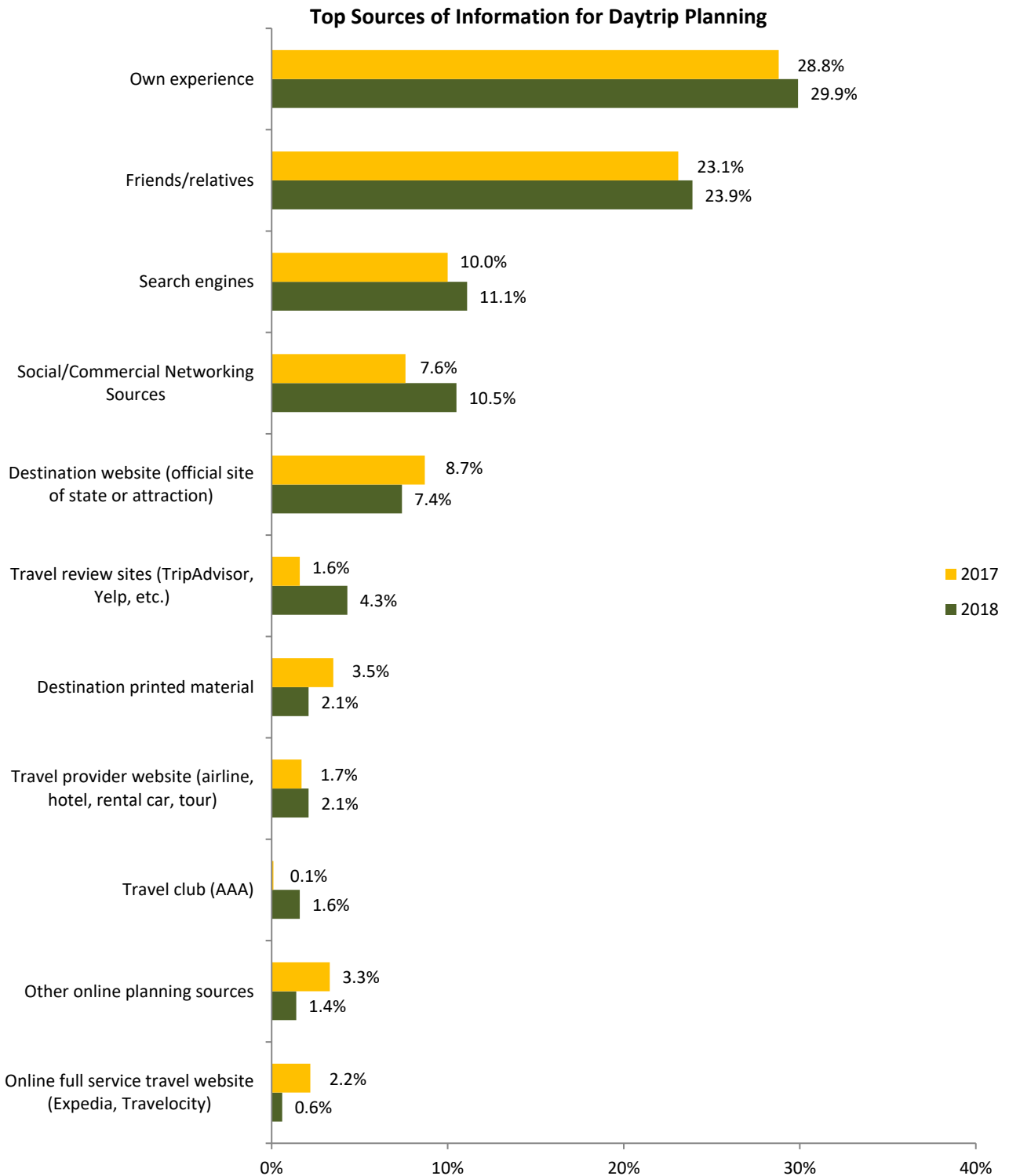


Trip Planning

Not surprisingly, daytrippers to and within North Carolina planned their visits within a shorter timeframe than overnighters. More than half of 2018 daytrip visitors made the decision to visit North Carolina less than two weeks before the visit.

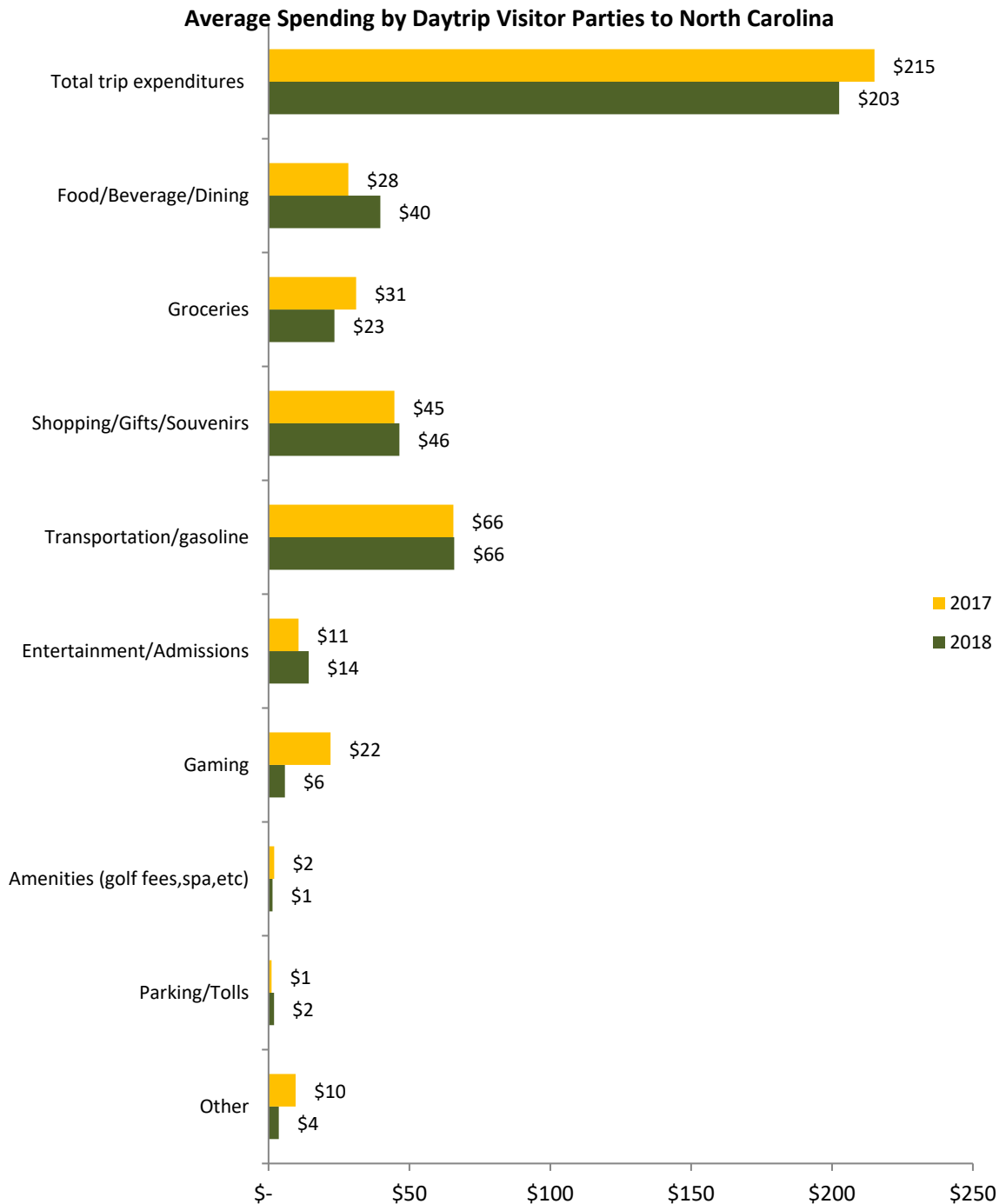


The top source of information for daytrip planning in North Carolina is personal experience, followed by friends/relatives, search engines, social networking and official destination websites.



Expenditures by North Carolina Daytrippers

The average daytrip visitor party spending in the state was \$203 in 2018, down slightly from \$215 in 2017. Daytrippers spent the most on transportation and dining.



Activities

Twenty percent of the daytrippers to North Carolina in 2018 visited shopping while on a daytrip in the state and seventeen percent visited relatives. Nine percent visited friends, while eight percent participated in fine dining and eight percent participated in rural sightseeing on their daytrip. Activity participation with the largest growth in proportion of daytrippers included shopping (+4 percentage points), visiting friends (+2 percentage points), fine dining (+2 percentage points) and visiting historic sites/churches (+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	2018	2017	Activity	2018	2017
Shopping	20%	16%	Bird Watching	2%	<1%
Visiting Relatives	17%	19%	Zoos/Aquariums/Aviaries	2%	4%
Visiting Friends	9%	7%	Special Events/Festivals	2%	2%
Fine Dining	8%	6%	Urban Sightseeing	2%	5%
Rural Sightseeing	8%	8%	Fishing	2%	<1%
Historic Sites/Churches	5%	3%	Art Galleries	2%	2%
State Park/Monument/Recreation area	4%	3%	Old Homes/Mansions	1%	3%
National Park/Monument/Recreation area	3%	3%	Theater/Drama	1%	1%
Hiking/Backpacking	3%	4%	Craft Breweries	1%	1%
Wildlife Viewing	3%	2%	Golf	1%	1%
Other nature (photography, rockhounding, etc.)	3%	3%	Native American ruins/Rock art	1%	<1%
Gardens	3%	1%	Mountain Biking	1%	<1%
Casino/Gaming	3%	4%	Musical performance/show	1%	2%
Nature Travel/Eco-touring	3%	2%	Sport Event-Youth/Amateur/ Collegiate/Other(Participant)	1%	1%
Beach	3%	2%	Snowsports other than skiing	1%	<1%
Museums	3%	5%	Nightclubs/Dancing	1%	1%
Theme Park/Amusement Park/Water Park	3%	1%	Symphony/opera/concert	1%	<1%
Wine Tasting/Winery Tour	2%	1%	Rock/mountain climbing	1%	<1%
Sport Event-Youth/Amateur/ Collegiate/Other(Spectator)	2%	3%	Distilleries	1%	<1%
Local/folk arts/crafts	2%	<1%	Farms/Ranches/Agri-tours	1%	<1%
			Scuba diving/snorkeling	1%	<1%

Demographic Profile of North Carolina Daytrip Visitors

Nearly two-thirds (63%) of North Carolina daytrippers of the visitors are married and thirteen percent of the region's visitors are divorced, widowed or separated.

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

Over half (59.0%) of North Carolina daytrippers have a household head with a college degree or higher. The average daytripper is 50 years old.

One-third (33.9%) of the daytrip visitor parties that traveled to North Carolina in 2018 had a household income \$75,000 or over. Ten percent had a household income of over \$125,000. The average household income of a daytrip visitor party in 2018 was \$67,510.

Just under half (45.5%) of daytrip visitor parties reported that the head of household is employed, while thirty-five percent are retired (up from twenty-five percent in 2017). The remainder reported "not employed" as work status.

The average household size of a North Carolina daytrip visitor party in 2018 was 2.5.

2018 Top Advertising Markets

In 2018, the top advertising markets sending daytrippers to **North Carolina** were Greensboro-Winston-Salem-High Point (15.7%), Charlotte (14.6%), Raleigh-Durham-Fayetteville (13.6%), Greenville-Spartanburg-Asheville (8.9%), and Greenville-New Bern-Washington (7.4%). The top out-of-state daytrip markets were Greenville-Spartanburg, Norfolk-Portsmouth-Newport News, Atlanta, Myrtle Beach-Florence, Columbia and Roanoke/Lynchburg. Advertising markets correspond with Nielsen's Designated Market Areas (DMAs).

Top Advertising Markets of Origin for North Carolina *Daytrippers*

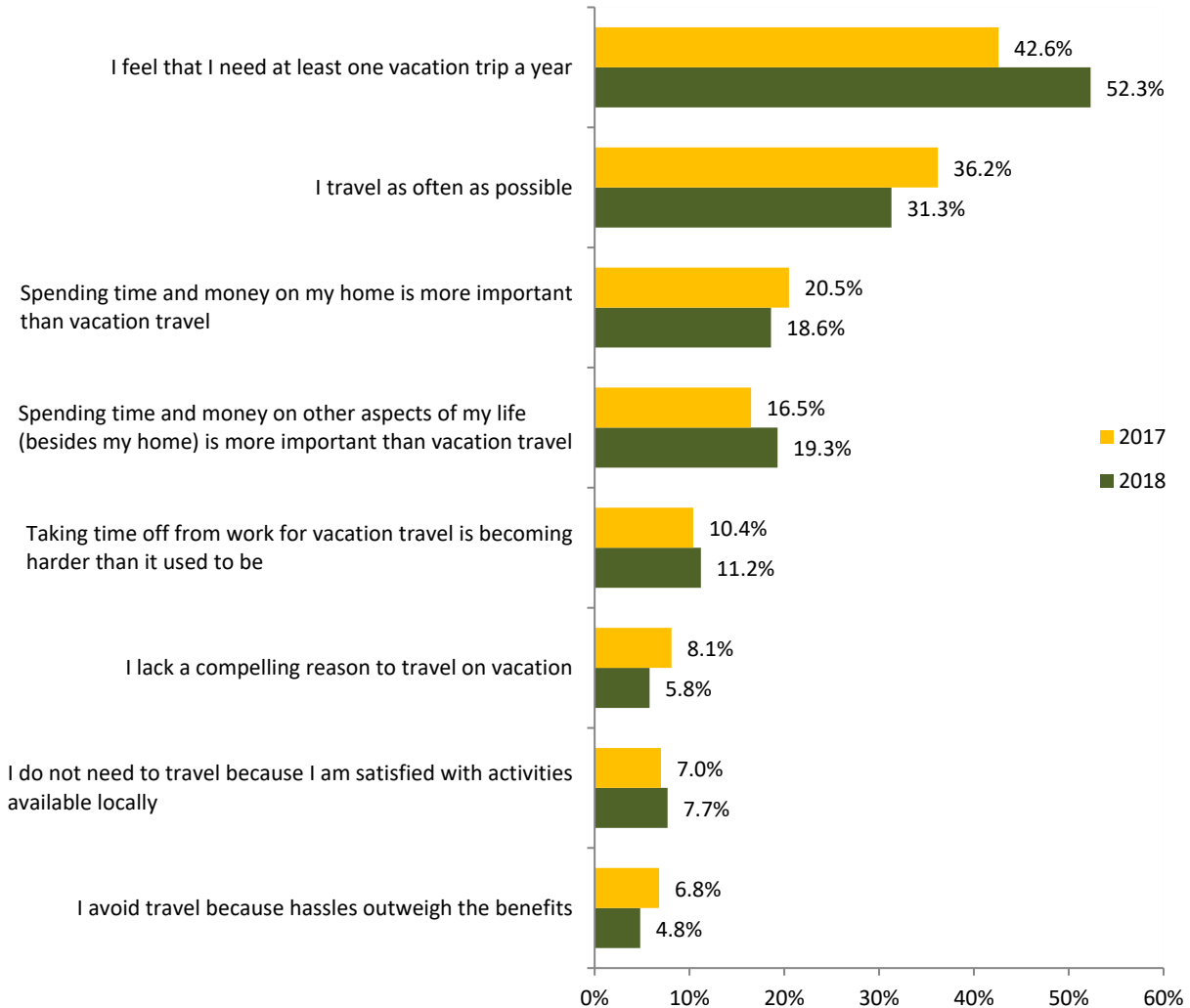
DMA of Origin	2018 Percentage of Total Daytrippers	2017 Percentage of Total Daytrippers
Greensboro-Winston Salem-High Point	15.7%	11.2%
Charlotte	14.6%	18.0%
Raleigh-Durham (Fayetteville)	13.6%	18.3%
Greenville-Spartanburg-Asheville-Anderson	8.9%	12.0%
Greenville-New Bern-Washington	7.4%	9.1%
Norfolk-Portsmouth-Newport News	5.4%	3.8%
Wilmington	5.3%	2.6%
Atlanta	4.2%	3.3%
Myrtle Beach-Florence	2.4%	1.8%
Columbia, SC	2.1%	1.5%
Roanoke/Lynchburg, VA	1.5%	1.4%
New York	1.4%	0.9%
Tri-Cities, TN-VA	1.4%	1.0%
Augusta	1.4%	0.5%
Washington DC	1.3%	1.3%

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

Vacation Attitudes

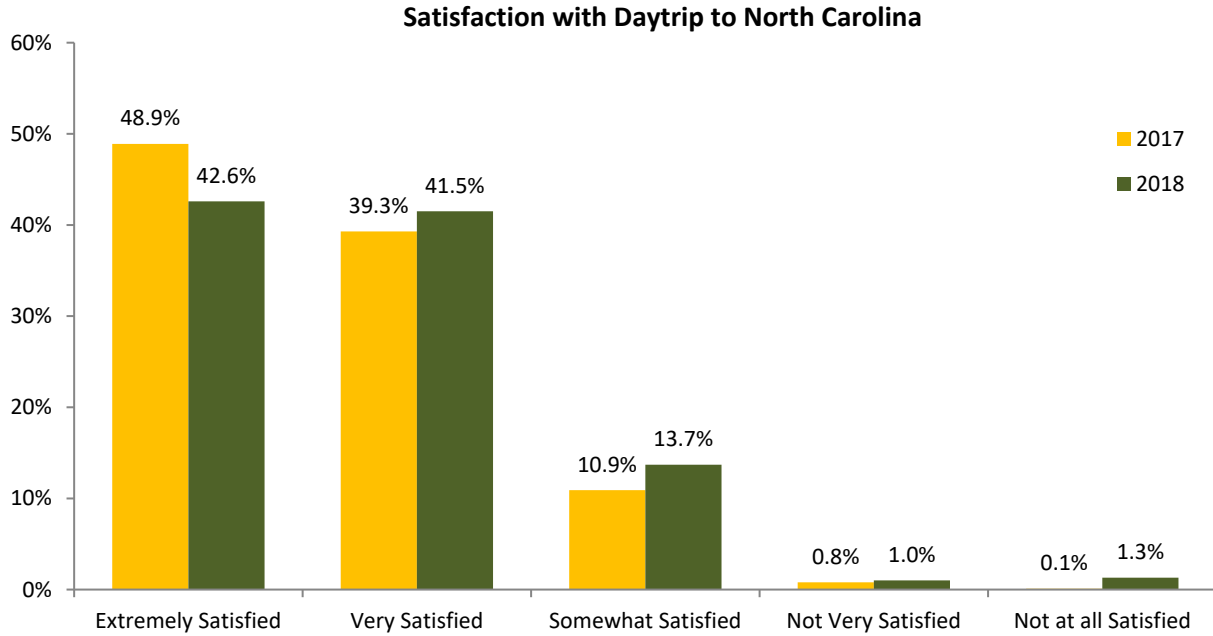
More than half of North Carolina daytrippers report that they need at least one vacation a year and nearly one-third note that they travel as often as possible. Less than five percent indicate that they avoid travel due to the hassles involved with traveling.

Current Feelings Concerning Vacation Travel



Satisfaction with Daytrips to North Carolina

More than eighty-four percent of daytrippers to North Carolina in 2018 were either very or extremely satisfied with their daytrip to or within the state. Less than three percent were not satisfied.

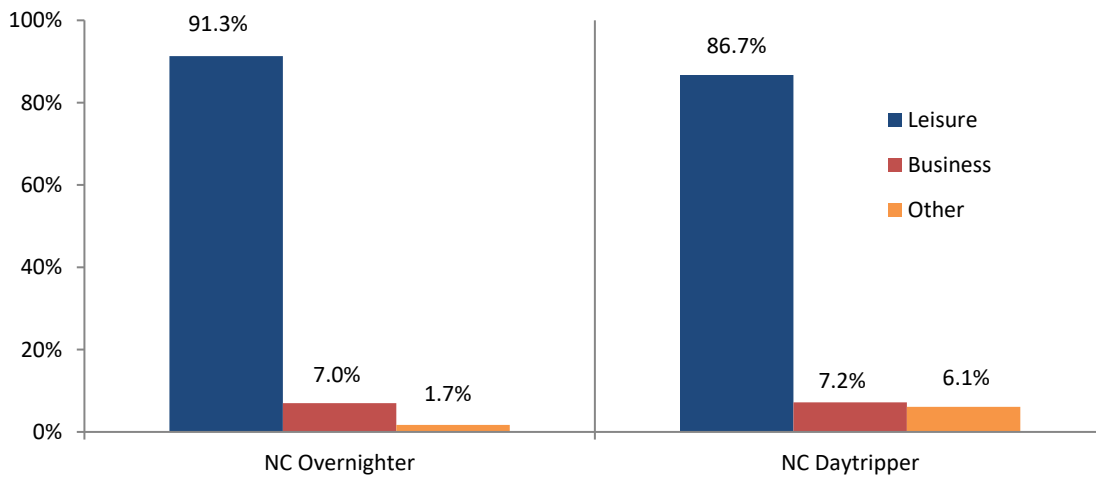


2018 Overnight vs. Daytrip Comparison

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

Both overnigheters and daytrippers primarily travel for leisure purposes, while less than ten percent of either reported business as trip purpose.

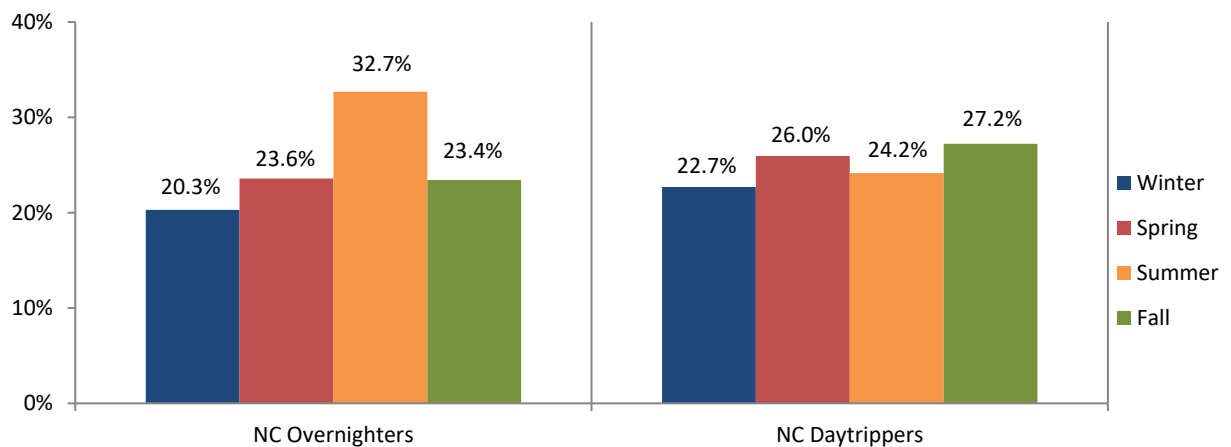
2018 Primary Purpose of Trip



Travel Volume by Season

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

2018 Season of Travel



2018 North Carolina Overnight Vs. Daytrip

The average party size for overnight visitors was slightly larger than that of daytrippers in 2018. Daytrip visitor parties were only slightly less likely to include children in the party.

2018 Travel Party Size

North Carolina Overnights	North Carolina Daytrippers
2.2 people	2.0 people

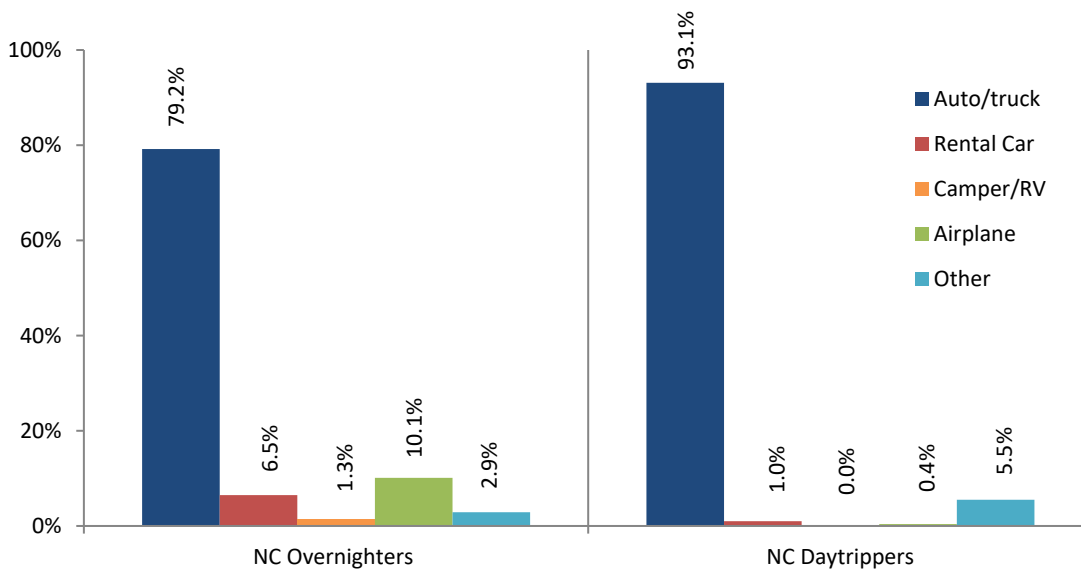
2018 Children on Trip

North Carolina Overnights	North Carolina Daytrippers
30.0%	28.6%

Mode of Transportation

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

2018 Primary Transportation by Overnight Visitors



Origin of Visitors

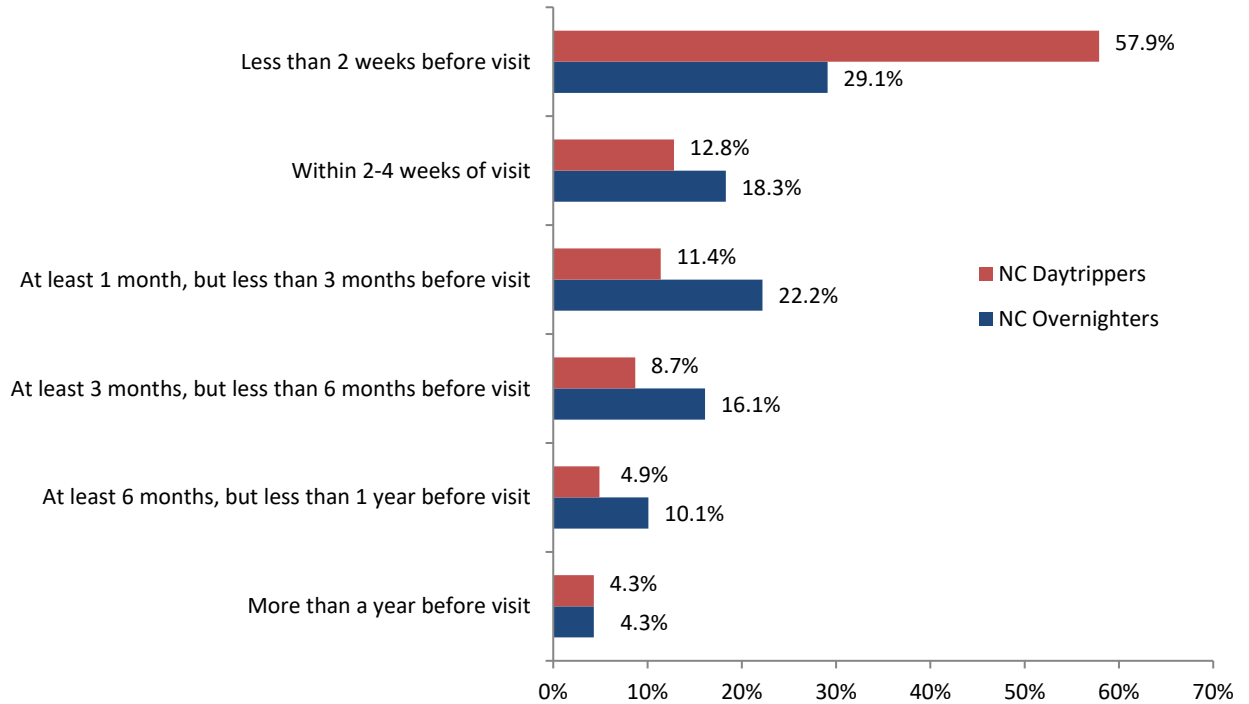
North Carolina is the top state of origin for both overnights and daytrippers to the state. In-state residents comprise thirty-four percent of the state’s overnight visitors and two-thirds of the state’s daytrippers. The state saw a large increase in daytrippers from South Carolina in 2018.

NC Overnights	NC Daytrippers
North Carolina (34.4%)	North Carolina (66.2%)
Virginia (9.3%)	South Carolina (12.1%)
South Carolina (7.3%)	Georgia (5.6%)
Georgia (6.7%)	Virginia (4.7%)
Florida (5.4%)	Tennessee (1.9%)
New York (4.2%)	Florida (1.5%)
Pennsylvania (4.2%)	West Virginia (1.2%)
Tennessee (3.7%)	New York (0.9%)
Ohio (3.3%)	Ohio (0.8%)
Maryland (2.7%)	Pennsylvania (0.6%)

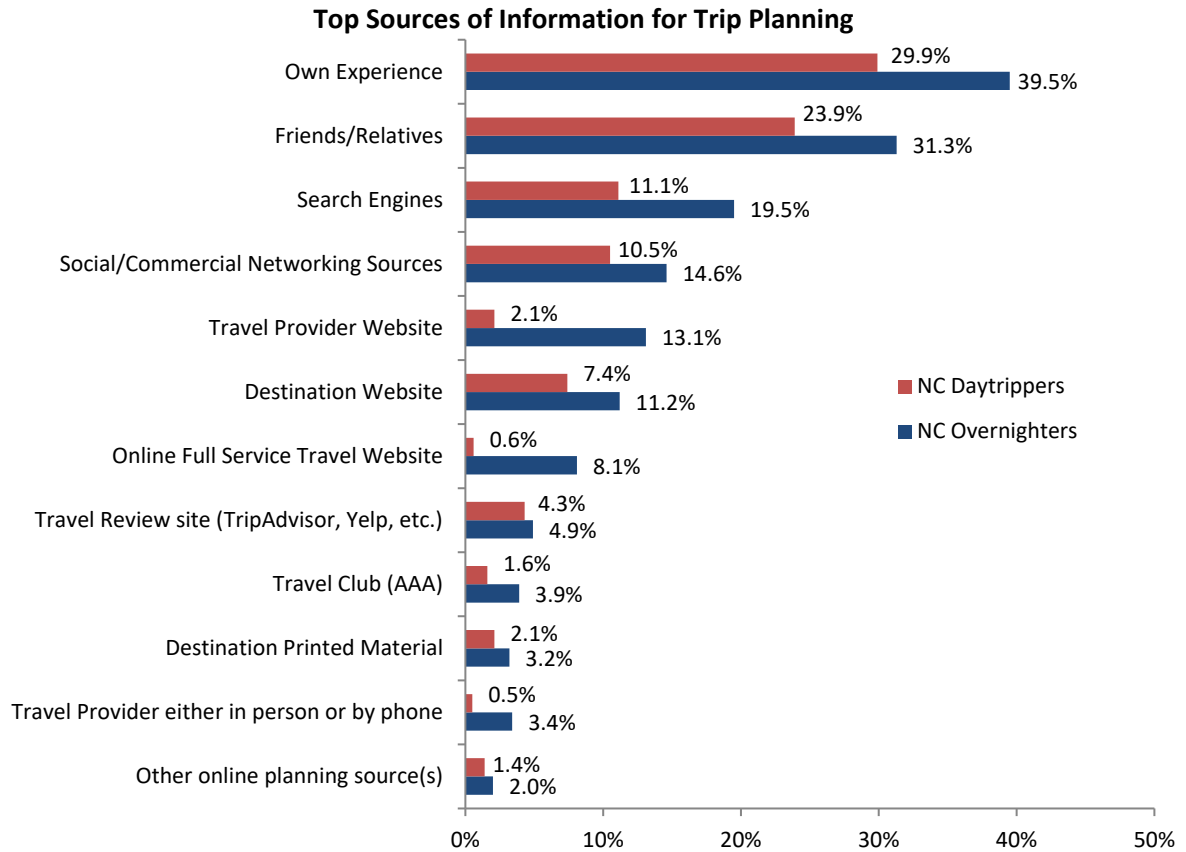
Trip Planning

Daytrippers, not surprisingly, made the decision to visit North Carolina in a shorter time frame than overnights. More than half made the decision less than 2 weeks prior to the visit, while under 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

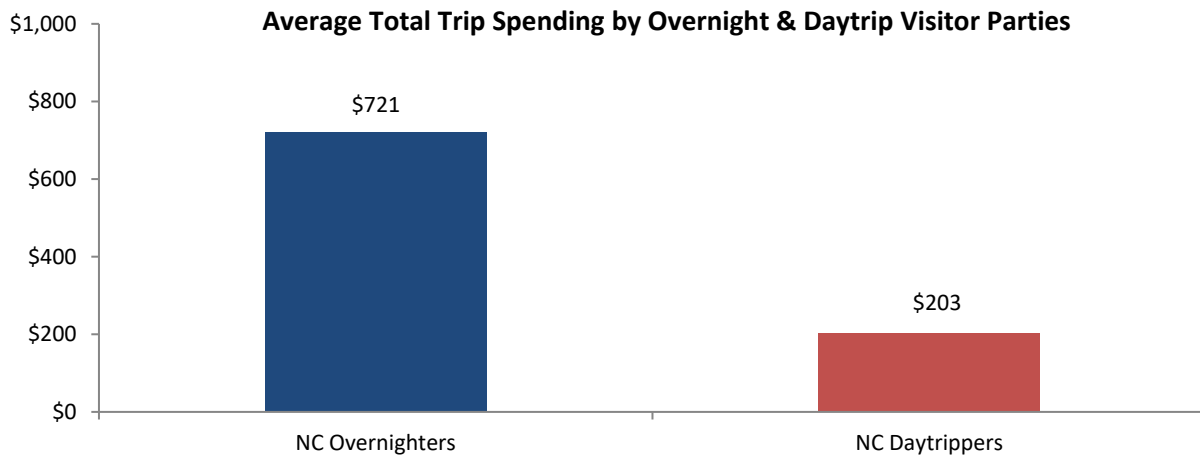


In trip planning, overnights to North Carolina relied on a larger variety of sources than daytrippers. They used personal experience, friends/relatives, search engines, social media and websites more than daytrippers.



Trip Expenditures

On average, 2018 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 (28.4%)	Shopping (20.1%)
Shopping (27.3%)	Visiting Relatives (17.4%)
Beach (18.4%)	Visiting Friends (9.3%)
Visiting Friends (15.7%)	Fine Dining (7.7%)
Fine Dining (14.4%)	Rural Sightseeing (7.6%)
Rural Sightseeing (13.5%)	Historic Sites/Churches (4.7%)
Historic Sites/Churches (11.8%)	State Park/Monument/Recreation area (4.1%)
State Park/Monument/Recreation area (8.0%)	National Park/Monument/Recreation area (3.2%)
Urban Sightseeing (7.9%)	Hiking/Backpacking (2.9%)
Museums (7.7%)	Wildlife Viewing (2.8%)
Hiking/Backpacking (7.3%)	Other nature (photography, rockhounding, etc.) (2.8%)
Wildlife Viewing (7.3%)	Gardens (2.6%)
Craft Breweries (7.3%)	Casino/Gaming (2.6%)
Local/folk arts/crafts (5.7%)	Nature Travel/Eco-touring (2.6%)
National Park/Monument/Recreation area (5.5%)	Beach (2.5%)
Fishing (5.2%)	Museums (2.5%)
Old Homes/Mansions (5.0%)	Theme Park/Amusement Park/Water Park (2.5%)
Gardens (4.9%)	Wine Tasting/Winery Tour (2.1%)
Nightclubs/Dancing (4.7%)	Sport Event-Youth/Amateur/ Collegiate/Other(Spectator) (2.0%)
Zoos/Aquariums/Aviaries (4.3%)	Local/folk arts/crafts (1.9%)
Art Galleries (4.3%)	Bird Watching (1.9%)
Musical performance/show (4.3%)	Zoos/Aquariums/Aviaries (1.7%)
Wine Tasting/Winery Tour (4.1%)	Special Events/Festivals 1.7(%)
Golf (3.7%)	Urban Sightseeing (1.6%)
Other nature (photography, rockhounding, etc.) (3.6%)	Fishing (1.6%)
Casino/Gaming (3.5%)	Art Galleries (1.6%)
Nature Travel/Eco-touring (3.3%)	Old Homes/Mansions (1.4%)
Bird Watching (3.3%)	Theater/Drama (1.4%)
Special Events/Festivals (2.9%)	Craft Breweries (1.2%)
Theater/Drama (2.4%)	Golf (1.1%)
Biking/Road Biking/Cycling (2.3%)	Native American ruins/Rock art (1.0%)
Sport Event-Youth/Amateur/Collegiate/Other(Spectator) (2.0%)	Mountain Biking (1.0%)
Spa/Health Club (2.0%)	Musical performance/show (0.9%)
Theme Park/Amusement Park/Water Park (1.9%)	Sport Event-Youth/Amateur/ Collegiate/Other(Participant) (0.9%)
Sport Event-Youth/Amateur/Collegiate/Other(Participant) (1.8%)	Snowsports other than skiing (0.9%)
Rafting/Kayaking/Canoeing/Paddleboarding (1.6%)	Nightclubs/Dancing (0.7%)
Native American ruins/Rock art (1.4%)	Symphony/opera/concert (0.7%)
Motorboat/Jet ski (1.4%)	Rock/mountain climbing (0.7%)
Musical Theater (1.3%)	Distilleries (0.6%)
ATV/Four-wheeling (1.3%)	Farms/Ranches/Agri-tours (0.5%)

Demographic Profile for 2018 North Carolina Visitors

	North Carolina Overnighters	North Carolina Daytrippers
Average age of household head	46.2 years of age	50.0 years of age
Average household size	2.7	2.5
Education of Household Head		
High school or less	12.2%	13.6%
Some college – no degree	18.3%	27.4%
Completed college	46.0%	40.0%
Post Graduate College	23.5%	19.0%
Annual Household Income		
Less than \$30,000	9.8%	23.3%
\$30,000-\$49,999	14.9%	19.4%
\$50,000-\$74,999	21.0%	23.4%
\$75,000 & over	54.3%	33.9%
Average Annual Income	\$90,310	\$67,510
Employment		
Employed	64.4%	45.5%
Retired	20.5%	35.3%
Not employed	15.1%	19.2%
Marital Status		
Married	64.6%	62.9%
Never married	23.1%	23.9%
Divorced, widowed, separated	12.3%	13.2%
Ethnicity		
White	85.3%	84.9%
Black/African American	8.6%	9.1%
Asian or Pacific Islander	2.9%	3.0%
Other	3.2%	3.0%

2018 Top Advertising Markets

The top advertising markets for the overnighters and daytrippers were very similar, but differences can be noted in the ranks. Greensboro-Winston Salem-High Point ranks fifth in terms of overnighters, while the DMA ranks first 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 Overnighters

Charlotte (10.8%)
Raleigh-Durham-Fayetteville (10.6%)
Greenville-Spartanburg-Asheville (6.0%)
Atlanta (6.0%)
Greensboro-Winston Salem-High Point (5.5%)
New York (5.2%)
Washington, DC (Hagerstown, MD) (4.7%)
Norfolk-Portsmouth-Newport News (2.6%)
Philadelphia (2.3%)
Richmond-Petersburg (2.2%)
Greenville-New Bern-Washington (2.0%)
Tampa-St. Petersburg (Sarasota) (1.7%)
Wilmington (1.6%)
Myrtle Beach-Florence (1.6%)
Knoxville (1.6%)
Columbia (1.5%)
Roanoke-Lynchburg (1.5%)
Tri-Cities, TN-VA (1.5%)
Nashville (1.4%)

NC Daytrippers

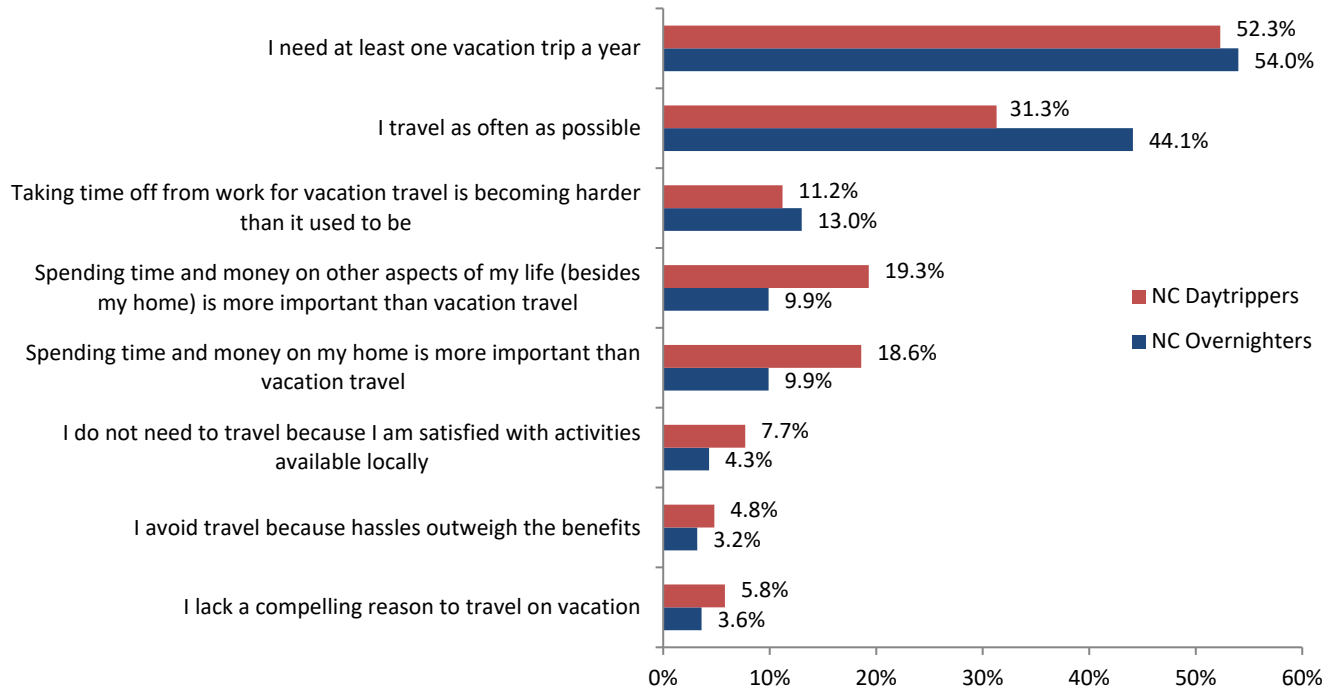
Greensboro-Winston Salem-High Point (15.7%)
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Greenville-New Bern-Washington (7.4%)
Norfolk-Portsmouth-Newport News (5.4%)
Wilmington (5.3%)
Atlanta (4.2%)
Myrtle Beach-Florence (2.4%)
Columbia (2.1%)
Roanoke-Lynchburg (1.5%)
Tri-Cities, TN-VA (1.4%)
New York (1.4%)
Augusta (1.4%)
Washington DC (1.3%)
Richmond-Petersburg (1.2%)
Chattanooga (1.2%)
Charleston-Huntington (1.1%)
Knoxville (0.8%)

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.

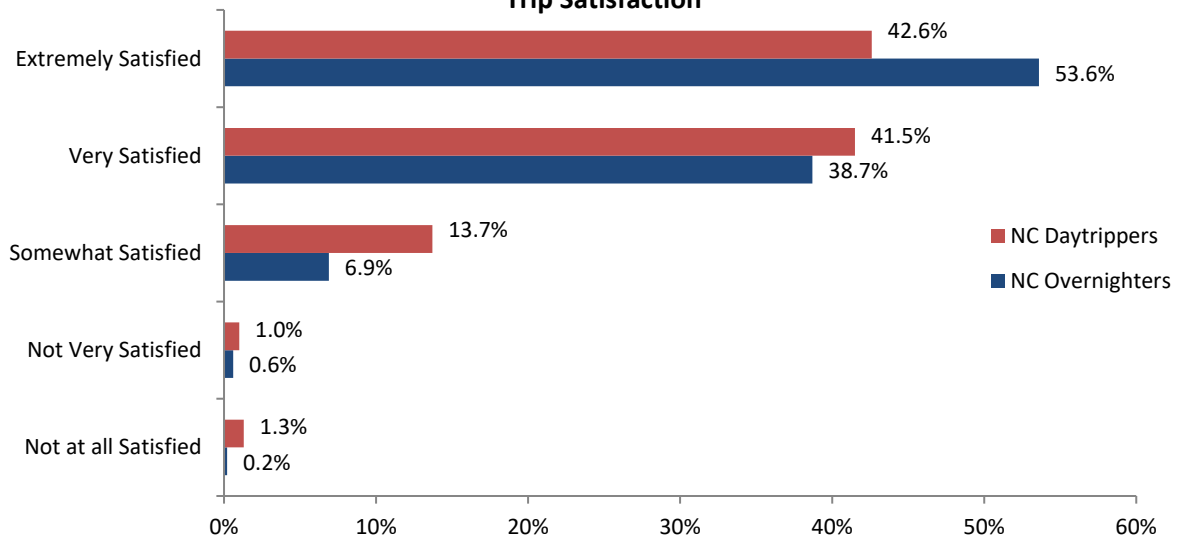
Current Feelings Concerning Vacation Travel



Trip Satisfaction

Both overnight visitors and daytrippers in North Carolina reported high trip satisfaction in 2018. Ninety-two percent of overnights and eighty-four percent of daytrippers expressed they were extremely or very satisfied with their trip.

Trip Satisfaction



2018 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.