

2019 North Carolina Regional Visitor Profile

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



2019 North Carolina Regional 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 regional report is to provide each region with research data specific to their geographic area. The report is divided into four sections: Coast, Piedmont, Mountain and a comparison section. At the end of the report, an appendix offers definitions of key travel terms.

2019 North Carolina Regional Visitor Profile

Table of Contents

	Page
Coastal Region Summary	4
<i>Coastal Overnight Visitors</i>	5
Piedmont Region Summary	14
<i>Piedmont Overnight Visitors</i>	15
Mountain Region Summary	24
<i>Mountain Overnight Visitors</i>	25
Regional Comparison	34
Glossary of Terms	44

2019 Domestic Coastal Region Travel Summary

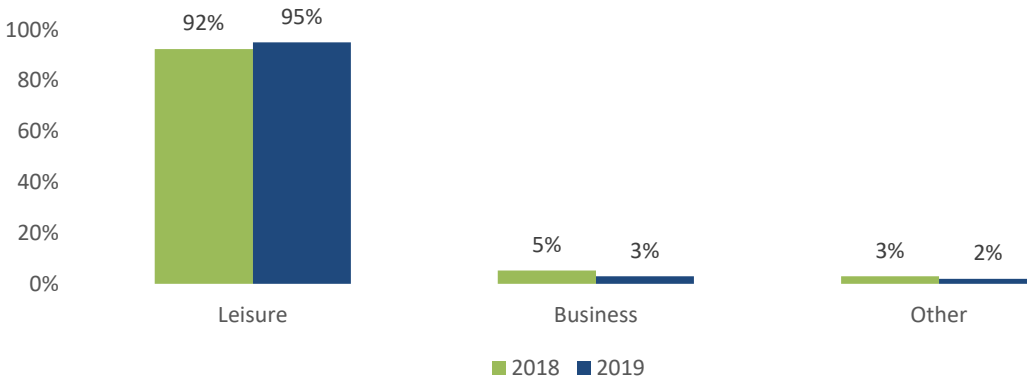
- ◆ In 2019, 25 percent of North Carolina visitors traveled to North Carolina’s Coastal Region, approximately 12.1 million person-trips (approximately 9.8 million overnight person-trips). For marketing purposes, the Coastal Region is made up of twenty-eight most eastern counties of North Carolina. *Note that the regional volume totals do not sum to the statewide volume total, as some visitors travel to multiple geographic regions in one visit.
- ◆ Ninety percent of all domestic visitors (and 95 percent of overnights) came to the Coastal Region for pleasure purposes, while seven percent of visitors (3 percent of overnights) came to conduct business (includes meeting/convention).
- ◆ Summer (June - August) was the most popular season for travel to North Carolina’s Coastal Region, with thirty-seven percent of all 2019 coastal visitors and thirty-nine percent of overnights. Spring (March-May) and fall (September - November) followed with twenty-five percent and twenty-one percent of coastal visitors (26 percent and 20 percent of overnights, respectively). The winter season (December-February) was the least visited with seventeen percent (16 percent of overnights).
- ◆ Overnight visitors to the Coastal Region spent an average of 4.0 nights in the region in 2019.
- ◆ Thirty-four percent of Coastal Region visitors lodged at a hotel/motel while thirty-six percent stayed in a private home. Eleven percent stayed in a rental home and three percent stayed in a rental condo. Four percent stayed in a personal second home or condo. More than seven percent of coastal overnights indicated that they lodged in a shared-economy property such as AirBnB or VRBO.
- ◆ The average travel party size for all Coastal Region visitors was 2.4 people. Thirty-eight percent of travel parties to the region included children in the party in 2019.
- ◆ Ninety-four percent of overnight travelers to the Coastal Region drove (includes personal automobile, rental, motorcycle and RV), while four percent traveled by air.
- ◆ In 2019, the average household trip expenditure in the Coastal Region was \$873. The average household trip expenditure for overnight visitors to the Coastal Region was \$1,036. Daytrip parties to the Coastal Region spent approximately \$243 per visit.
- ◆ The top states of origin of *overnight* visitors to the Coastal Region were North Carolina (51%), Virginia (14%), Pennsylvania (7%), New Jersey (4%), Maryland (3%), South Carolina (3%), Ohio (3%), West Virginia (3%) and Florida (2%).
- ◆ Forty-eight percent of all households (50 percent of overnight) that traveled to North Carolina’s Coastal Region in 2019 had a household income over \$75,000.
- ◆ In 2019, Raleigh/Durham (22%) was the top advertising market of origin for *overnight* travelers to the Coastal Region, followed by Charlotte (14%), Washington DC (8%), Greenville/New Bern/ Washington (7%), Greensboro/High Point/Winston Salem (5%) and Pittsburgh (5%).

Coastal Region Overnight Visitor Profile

Main Purpose of Visit

In 2019, ninety-five percent of domestic overnight visitors came to the Coastal Region for leisure purposes, which included visiting friends and relatives, outdoor recreation and entertainment/sightseeing. Approximately three percent of domestic overnight visitors came for general business, convention, seminar or other group meeting, while two percent traveled to the Coastal Region for other purposes.

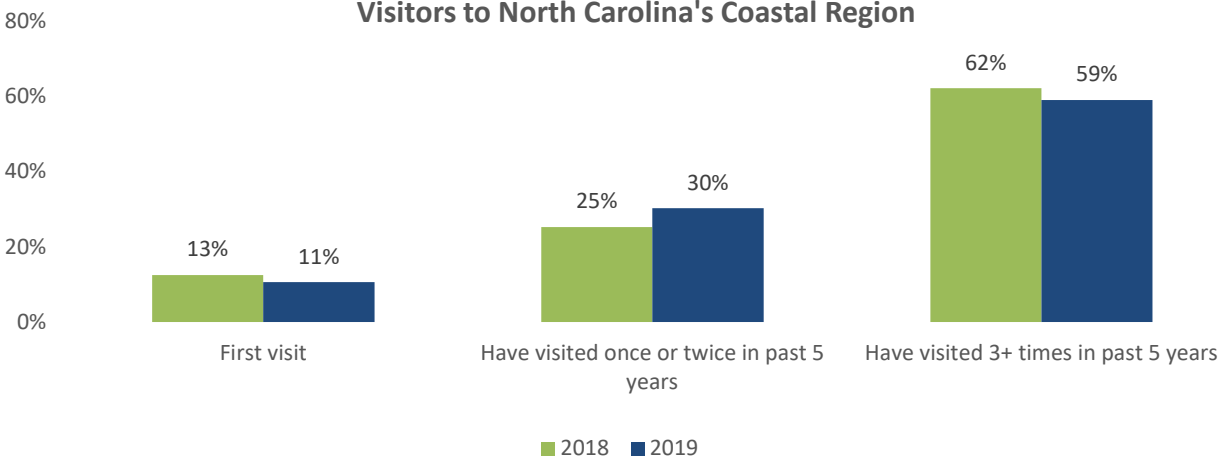
2019 Primary Purpose of Overnight Trip to North Carolina's Coastal Region



First Time Visitors

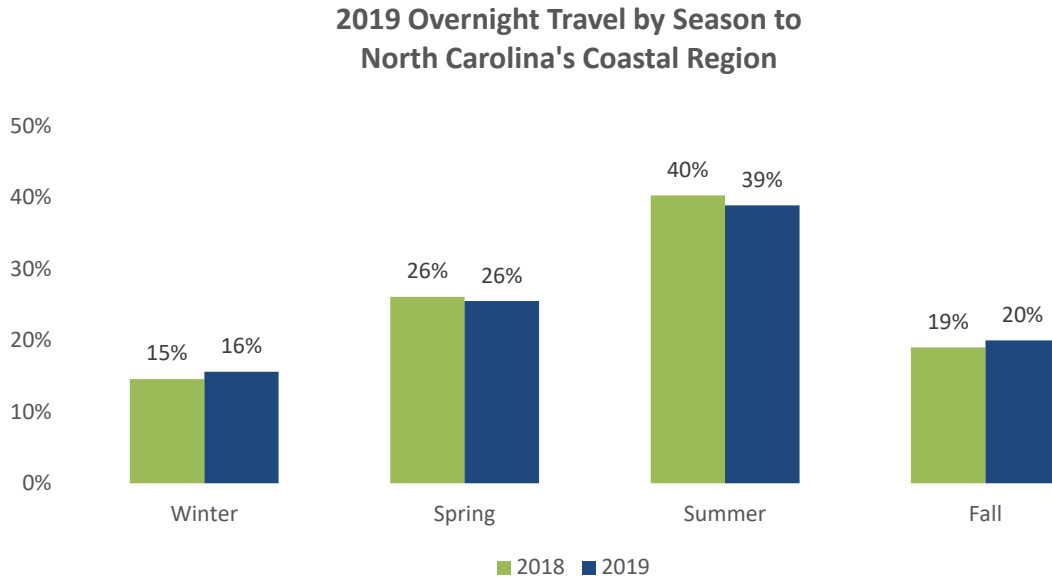
Eleven percent of overnight visitors to the Coastal Region were first time visitors in 2019, down from seventeen percent two years ago in 2017. The majority of overnight coastal visitors are still repeat, and frequent, visitors.

2019 First Time vs. Repeat Visitors to North Carolina's Coastal Region



Travel Volume by Season

When examining visitation based on the typical seasonal schedule, the summer (June through August), with nearly forty percent of the region’s annual visitors, remains the most popular season of the year for overnight travel to North Carolina’s Coastal Region. In 2019, seasonal visitation was very similar previous years’ patterns.



Average Length of Stay

In 2019, an average of 4.0 nights was spent by visitors to North Carolina’s Coastal Region. Data indicates that out-of-state visitors stay an average of 4.6 nights, while in-state visitors stay an average of 3.4 nights.

Travel Party Size

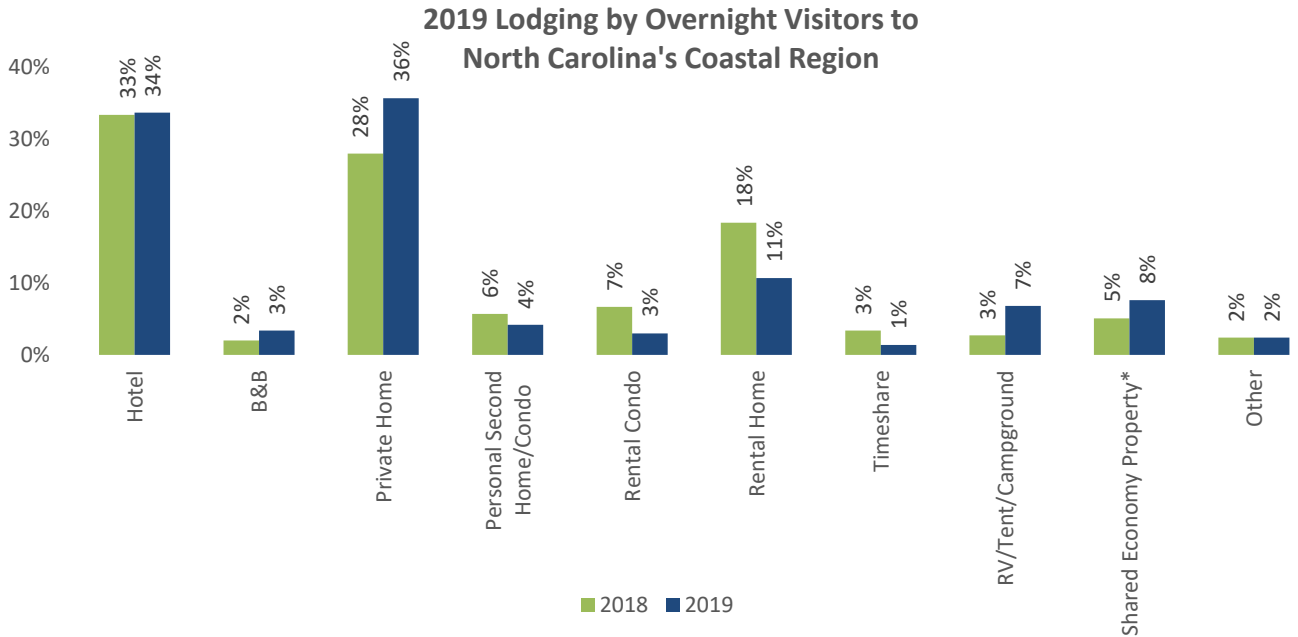
The average travel party size for Coastal Region overnight visitors was 2.6 people.

Children on Trip

Forty-one percent of overnight visitor parties to the Coastal Region included children, up from thirty-four percent two years ago in 2017. Among those who traveled with children, the average number of children on trips was 2.2 children.

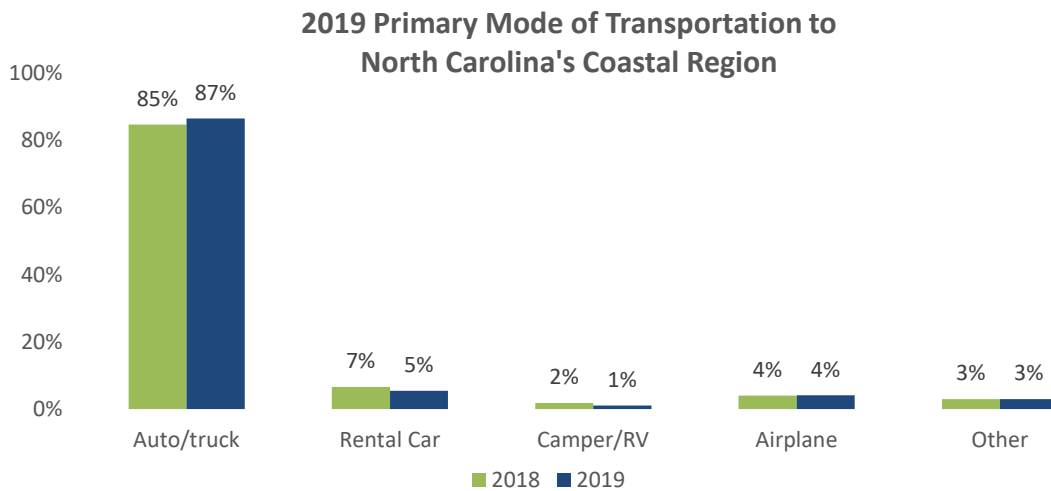
Lodging Used in Coastal Region

In 2019, one-third of Coastal Region overnight visitors lodged at a hotel/motel. Thirty-six percent of the region’s visitors stayed in a private home, and eleven percent stayed in a rental home. Data reflected that nearly eight percent of Coastal Region visitors chose to use some type of shared economy lodging, such as Airbnb or VRBO, up from five percent last year. It should be noted that some visitors use more than one type of accommodation during a visit, so totals equal more than 100%.



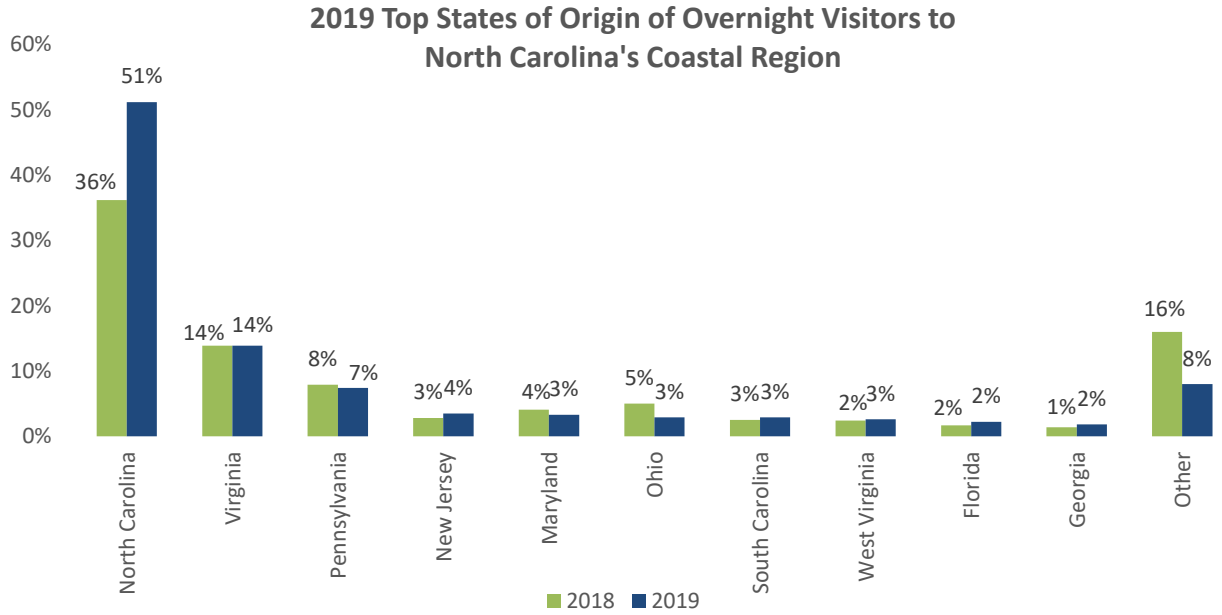
Mode of Transportation

In 2019, the personal auto was by far the dominant form of transportation (87%) for overnight visitors to the Coastal Region, while four percent traveled by air.



Origin of Visitors

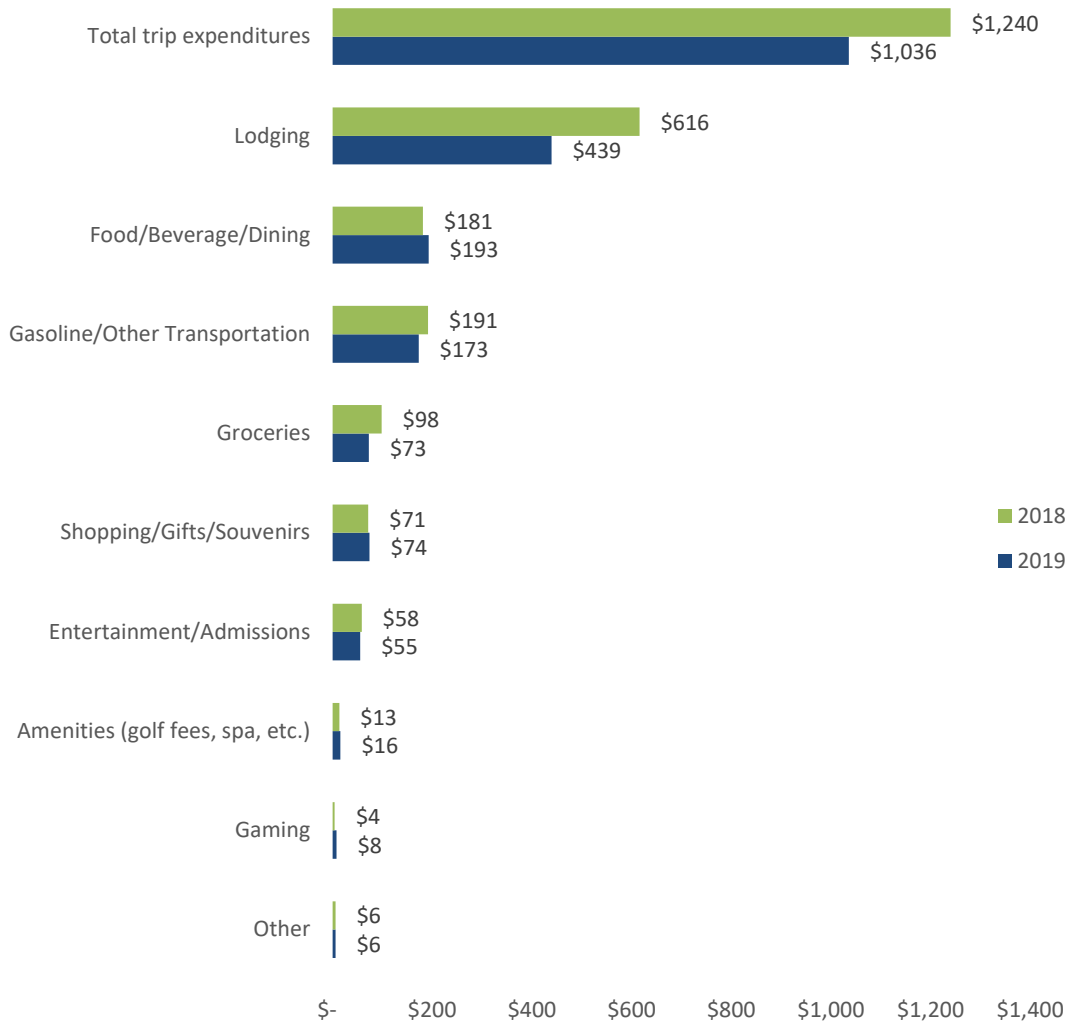
In 2019 the top state of origin for overnight visitors to the Coastal Region was in-state visitors from North Carolina (51%), up significantly from 2018. In-state visitation was followed by Virginia (14%), Pennsylvania (7%), New Jersey (4%), Maryland (3%), Ohio (3%), South Carolina (3%), and West Virginia (3%).



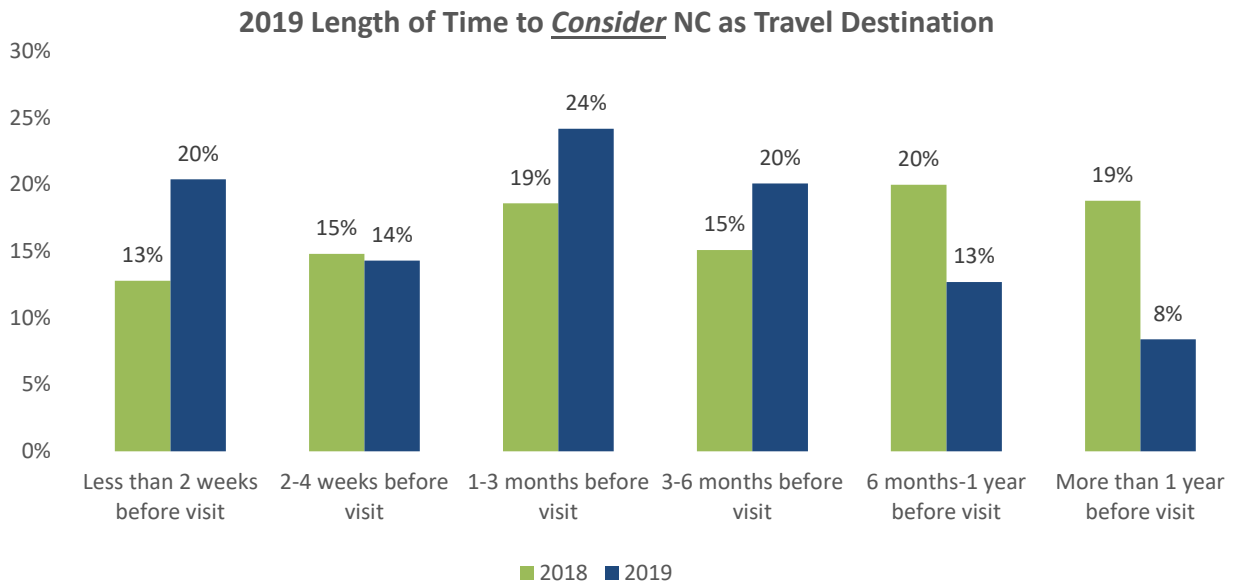
Amount Spent in Coastal Region

The average overnight visitor party spending per trip in the Coastal Region was down about 16 percent from 2018 to 2019. An explanation for the decrease in trip spending is a shorter average length of stay in 2019 which affected many of the spending categories, particularly lodging.

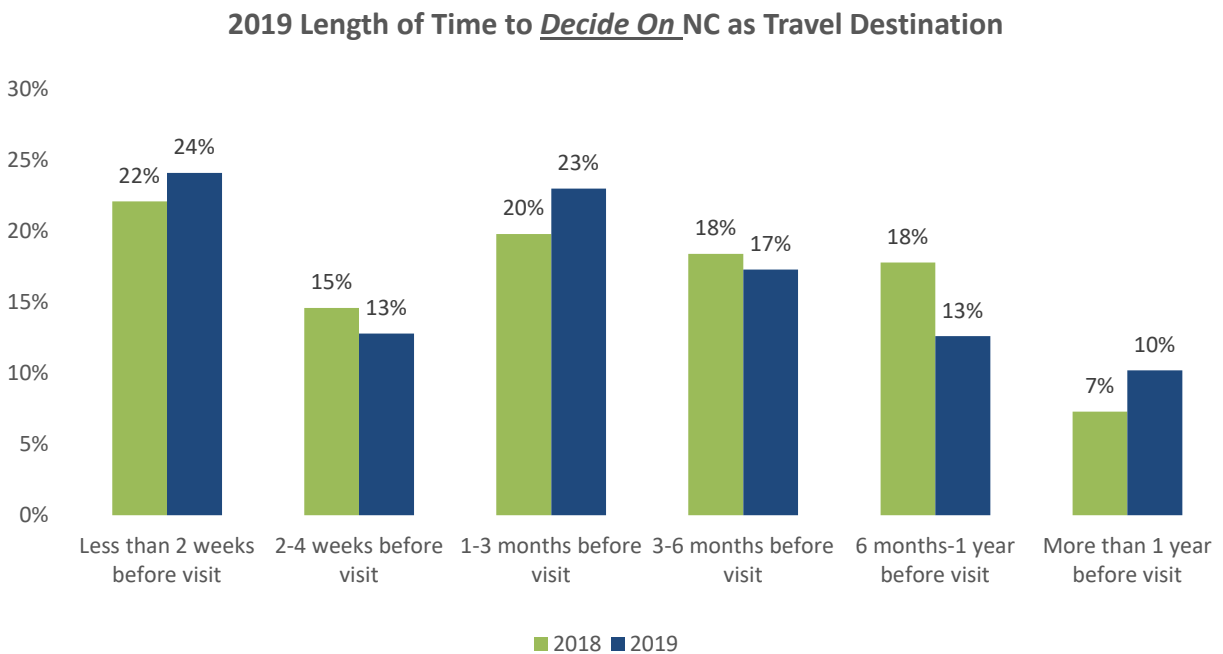
Average Trip Spending by Overnight Visitor Parties to North Carolina's Coastal Region



Travel Planning to Coastal Region



Coastal Region visitors typically consider and decide their vacation plans farther in advance than North Carolina visitors in general. However, in 2019, the timeframe for consideration of the Coastal Region was shorter than in 2018. More than half of Coastal Region visitors considered the state three months or less ahead of travel and the same proportion decided to visit at least three months or less ahead of travel. The proportion of the region’s overnight visitors who decided on the travel destination more than a year prior to travel increased from seven percent in 2018 to ten percent in 2019.



Activities

The following table provides information on activities participated in by coastal visitors in 2019. These are not indicative of purpose of trip, but what activities visitors participate in while in North Carolina. Nearly two-thirds of the overnight visitors to the region went to a beach and more than one-third shopped while visiting the coast. Other popular activities included visiting relatives (36%), visiting historic sites/churches (19%), fine dining (18%), rural sightseeing (17%) and visiting zoos/aquariums and museums (17%). ***Note that responses to this question are not mutually exclusive and percentages do not equal 100%. Therefore, proportions should not be aggregated to combine categories of activities. Also note that these activities do not imply purpose of trip.**

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

Activity	2018	2019
Beach	67.9%	60.2%
Shopping	33.5%	36.2%
Visiting Relatives	21.6%	36.0%
Historic Sites/Churches	17.2%	18.8%
Fine Dining	21.4%	18.3%
Rural Sightseeing	12.8%	16.5%
Zoos/Aquariums/Aviaries	10.2%	16.5%
Museums	10.3%	16.5%
Visiting Friends	14.6%	16.4%
Fishing (fresh or saltwater)	16.4%	14.9%
State Park/Monument/Recreation area	12.4%	11.9%
Wildlife Viewing	10.7%	10.3%
Urban Sightseeing	8.9%	9.0%
Local/folk arts/crafts	3.7%	6.8%
Nature Travel/Eco-touring	3.3%	6.4%
Old Homes/Mansions	5.7%	6.1%
Gardens	5.5%	6.0%
Craft Breweries	9.0%	5.9%
Golf	6.1%	5.9%
Bird Watching	5.8%	5.2%
Hiking/Backpacking	4.8%	4.7%
National Park/Monument/Recreation area	7.9%	4.7%
Spa/health club	2.9%	4.2%
ATV/Fourwheeling	3.2%	3.8%
Rafting/Kayaking/Canoeing	3.8%	3.8%
Nightclubs/Dancing	3.3%	3.8%
Other nature (photography, rockhounding, etc.)	2.3%	3.7%
Biking/Road Biking/Cycling	9.0%	3.7%
Theme Park/Amusement Park/Water Park	3.2%	3.4%
Wine Tasting/Winery Tour	4.4%	3.3%
Theater/drama	1.8%	3.2%
Art Galleries	4.6%	3.2%
Special Events/Festivals	2.4%	3.1%
Musical performance/show	3.1%	3.0%
Water skiing	1.3%	2.8%
Musical theater	0.8%	2.7%

Demographic Profile of North Carolina Coastal Region Overnight Visitors

More than two-thirds (69.3%) of North Carolina Coastal Region overnight visitors are married and twenty percent of the region’s visitors have never been married. Ten percent are divorced, widowed or separated.

The largest proportion of North Carolina Coastal Region overnight visitors classifies themselves as white (88.9%), and five percent classify themselves as black/African American. One percent listed their ethnicity as Asian/Pacific Islander.

The average Coastal Region overnight visitor is 46 years old and more than half (60%) of regional overnight visitor parties have a household head with a college degree or higher.

The average household income of a visitor party to the Coastal Region in 2019 was \$83,180 with half (50.4%) of the visitor parties reporting a household income \$75,000 or more. Nineteen percent had a household income of over \$125,000.

Sixty-four percent of overnight visitor parties reported that the head of household is employed, while seventeen percent are retired. The remainder reported “not employed” as work status.

The average household size of a North Carolina Coastal Region overnight visitor party in 2019 was 3.0.

2019 Top Advertising Markets

In 2019, the top advertising markets sending overnight visitors to **North Carolina’s Coastal Region** were Raleigh-Durham-Fayetteville (21.8%), Charlotte (14.2%), Washington DC (8.3%), Greenville-New Bern-Washington (6.9%), Greensboro-High Point-Winston-Salem (5.2%), Pittsburgh (4.5%), New York, NY (4.3%) and Richmond-Petersburg, VA (3.7%). In-state, the share of visitors from Raleigh-Durham increased from sixteen percent in 2018 to nearly twenty-two percent in 2019 and Charlotte increased from nine percent in 2018 to fourteen percent in 2019. The share of visitors from Greenville-New Bern-Washington and Wilmington increased as well. Out-of-state, Washington DC, Pittsburgh and New York increased. Advertising markets correspond with Nielsen’s Designated Market Areas (DMAs).

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

<i>DMA of Origin</i>	<i>2018 % of Coastal Visitors</i>	<i>2019 % of Coastal Visitors</i>	<i>2018 Coastal Share of Total NC Visitors from DMA</i>	<i>2019 Coastal Share of Total NC Visitors from DMA</i>
Raleigh-Durham (Fayetteville)	16.3%	21.8%	30.5%	32.5%
Charlotte	8.9%	14.2%	16.6%	19.5%
Washington DC Metro	6.4%	8.3%	27.5%	29.1%
Greenville-New Bern-Washington	2.0%	6.9%	21.4%	29.6%
Greensboro-High Point-Winston Salem	7.3%	5.2%	26.3%	20.5%
Pittsburgh	0.8%	4.5%	18.2%	66.7%
New York, NY	3.8%	4.3%	14.5%	18.3%
Richmond-Petersburg, VA	5.7%	3.7%	53.1%	29.7%
Wilmington	0.7%	3.0%	8.7%	47.4%
Norfolk-Portsmouth-Newport News, VA	5.3%	2.6%	39.5%	22.2%
Charleston-Huntington	0.9%	2.0%	18.8%	42.9%
Philadelphia, PA	3.7%	2.0%	33.3%	26.1%
Cleveland-Akron, OH	1.7%	1.9%	50.0%	33.3%
Roanoke-Lynchburg	1.6%	1.8%	22.7%	22.7%
Louisville	0.1%	1.6%	50.0%	98.0%
Atlanta	0.7%	1.5%	2.3%	6.8%
Baltimore	1.7%	1.3%	29.4%	22.2%
Myrtle Beach-Florence	1.0%	0.8%	12.5%	7.4%

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

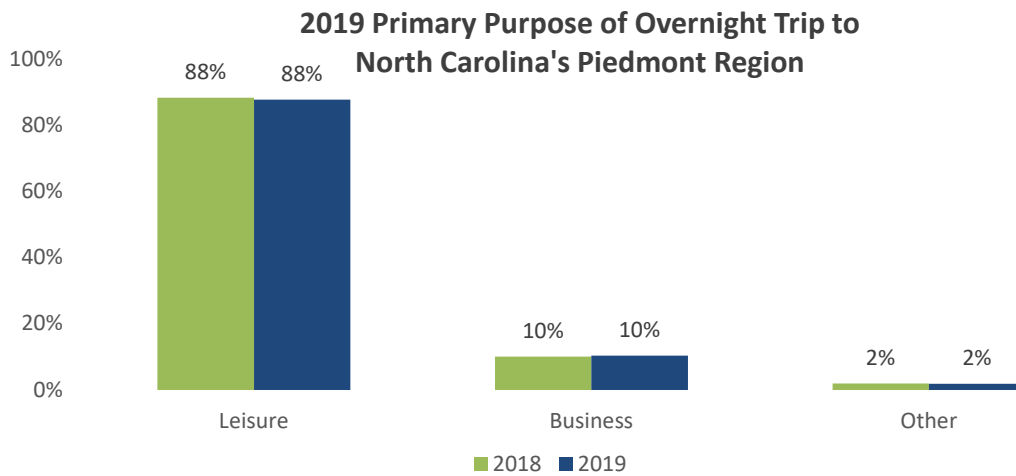
2019 Domestic Piedmont Region Visitor Profile

- ◆ In 2019, 76 percent of North Carolina visitors traveled to North Carolina’s Piedmont Region, approximately 36.5 million person-trips (approximately 28.4 million overnight person-trips). For marketing purposes, the Piedmont Region is made up of the 49 most central counties of North Carolina. *Note that the regional volume totals do not sum to the statewide volume total, as some visitors travel to multiple geographic regions in one visit.
- ◆ Eighty-seven percent of all domestic visitors (88 percent of overnights) came to the Piedmont Region for pleasure purposes, while nearly eleven percent of all visitors (10 percent of overnights, down from 17 percent in 2015) came to conduct business (includes meeting/convention).
- ◆ Travel to the Piedmont was more consistent seasonally than the other regions. Summer (June - August) welcomed the most visitors with twenty-nine percent. Spring (March - May) had twenty-five percent of the region’s annual visitors. Fall (September - November) and winter (January, February and December) welcomed twenty-four and twenty-three percent of the region’s visitors respectively.
- ◆ Overnight visitors to the Piedmont Region spent an average of 3.9 nights in the region.
- ◆ Fifty-one percent of Piedmont Region visitors lodged in a hotel/motel, and forty-one percent stayed in a private home. Four percent of overnight visitors to the region reported staying in a shared economy property such as AirBnB or VRBO.
- ◆ The average travel party size for all Piedmont Region visitors was 2.1 people. Thirty-one percent of all travel parties to the region included children in the party (33 percent of overnights).
- ◆ Eighty percent of all overnight travelers to the Piedmont Region drove (includes personal automobile, rental, and motorcycle), while sixteen percent traveled by air.
- ◆ In 2019, the average household trip expenditure in the Piedmont Region was \$623. The average household trip expenditure for overnight visitors to the Piedmont Region was \$781. Daytrip parties to the Piedmont region spent approximately \$217 per visit in 2019.
- ◆ The top states of origin of *overnight* visitors to the Piedmont Region in 2019 were North Carolina (30%), Virginia (13%), South Carolina (10%), New York (5%), Florida (5%) and Georgia (4%).
- ◆ Fifty-one percent of the households (54 percent of overnight) that traveled to North Carolina’s Piedmont Region in 2019 had a household income over \$75,000.
- ◆ In 2019, Charlotte (8.8%) was the top advertising market of origin for *overnight* travelers to the Piedmont Region, followed by Raleigh/Durham/Fayetteville (8.3%), New York (6.1%), Washington DC (5.5%), Greensboro-High Point-Winston Salem (4.9%), Greenville-New Bern-Washington (4.4%), and Atlanta (3.1%).

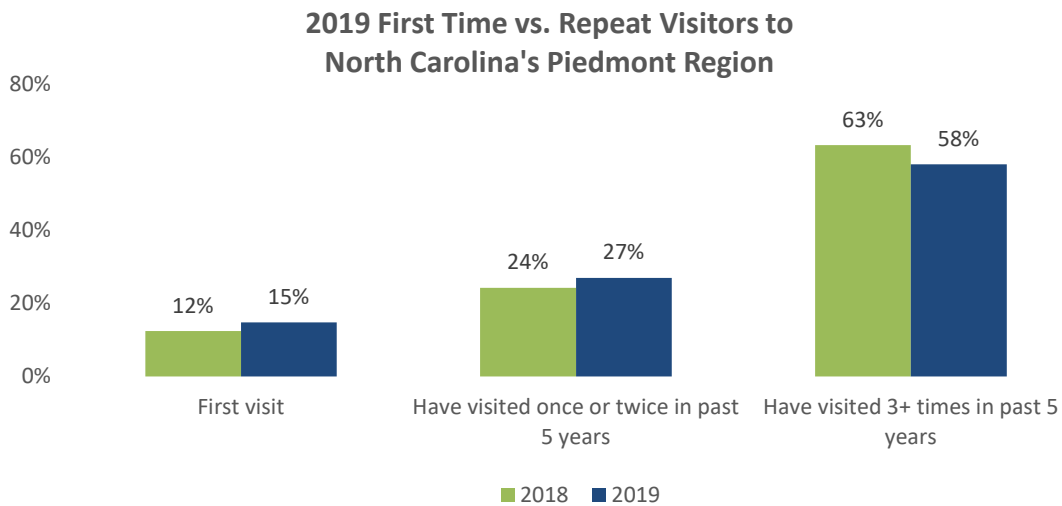
Piedmont Region Overnight Visitor Profile

Main Purpose of Visit

In 2019, similar to 2018, eighty-eight percent of domestic overnight visitors came to the Piedmont Region for leisure purposes, which included visiting friends and relatives, outdoor recreation and entertainment/sightseeing. This is up from seventy-two percent in 2014. Business travel visitors represented ten percent of the region’s visitors.

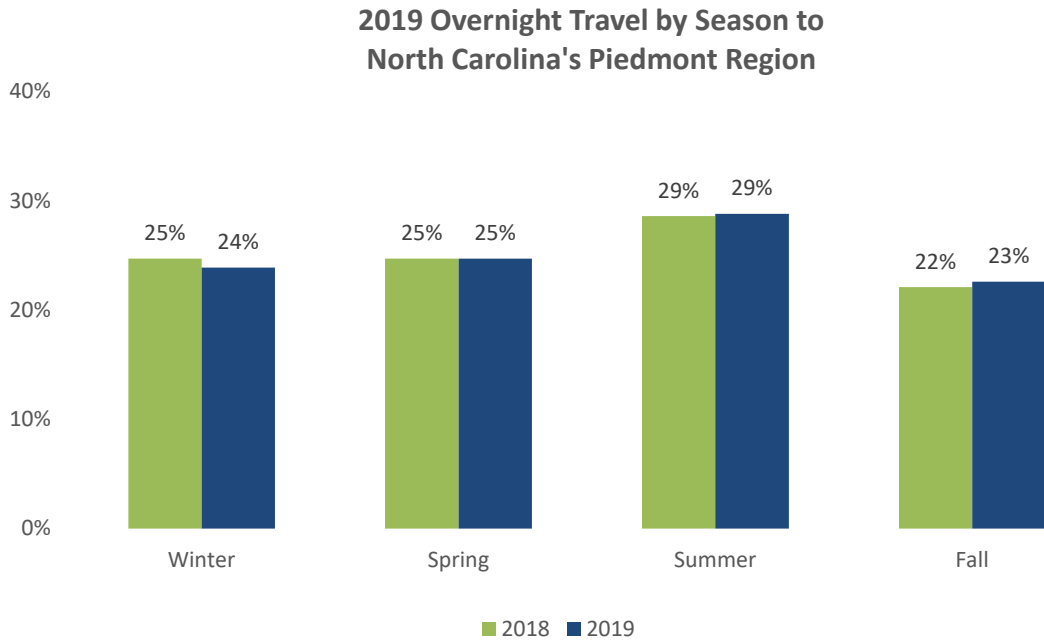


Frequent, repeat visitors to North Carolina comprised the largest proportion of Piedmont Region visitors. Fifteen percent of the region’s out-of-state visitors were first time visitors in 2019, up from twelve percent in 2018.



Travel Volume by Season

The Piedmont Region typically sees more consistent visitation throughout the year than the other two regions. Seasonal patterns in 2019 mirrored those of 2018.



Average Length of Stay

In 2019, an average of 3.9 nights was spent by visitors to North Carolina’s Piedmont Region. This was an increase from the 2018 length of stay of 3.3 nights. Data indicates that out-of-state visitors stay an average of 4.0 nights, while in-state visitors stay an average of 3.6 nights.

Travel Party Size

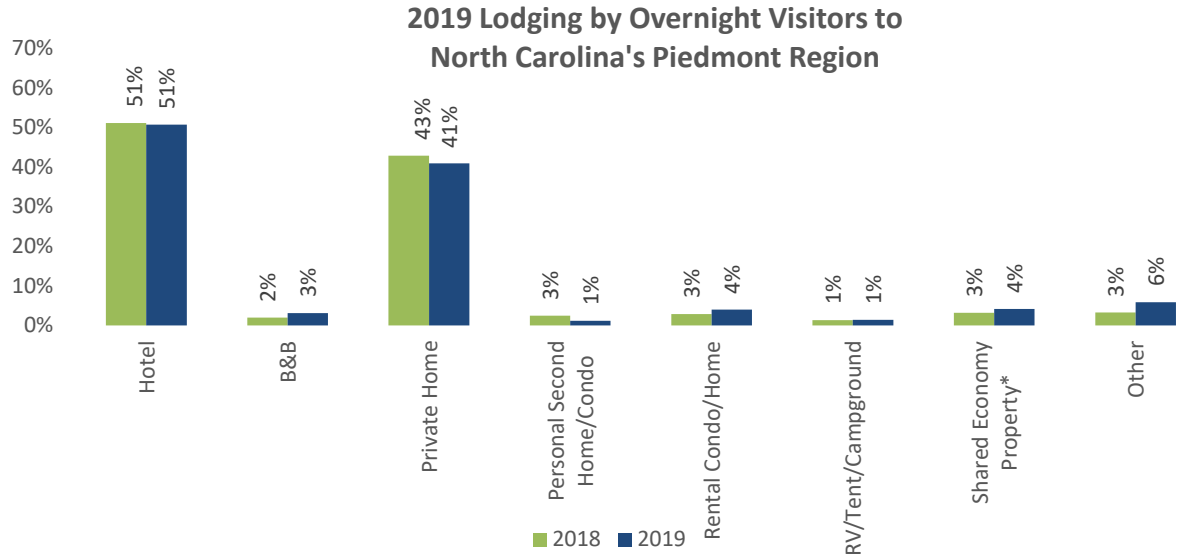
The average travel party size for all Piedmont Region overnight visitors was 2.2 people.

Children on Trip

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

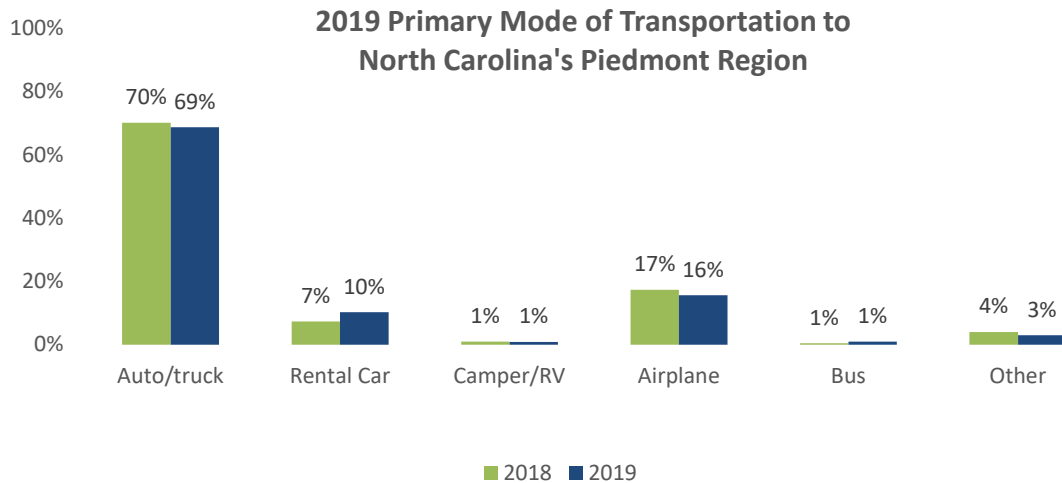
Lodging Used in Piedmont Region

In 2019, half of Piedmont Region visitors stayed in a hotel/motel, and nearly half (41%) of visitors stayed in a private home. Data reflected that in 2019 approximately four percent of Piedmont Region visitors chose to use some type of shared economy lodging, such as AirBnB or VRBO. It should be noted that some visitors use more than one type of accommodation during a visit, so totals equal more than 100%.



Mode of Transportation

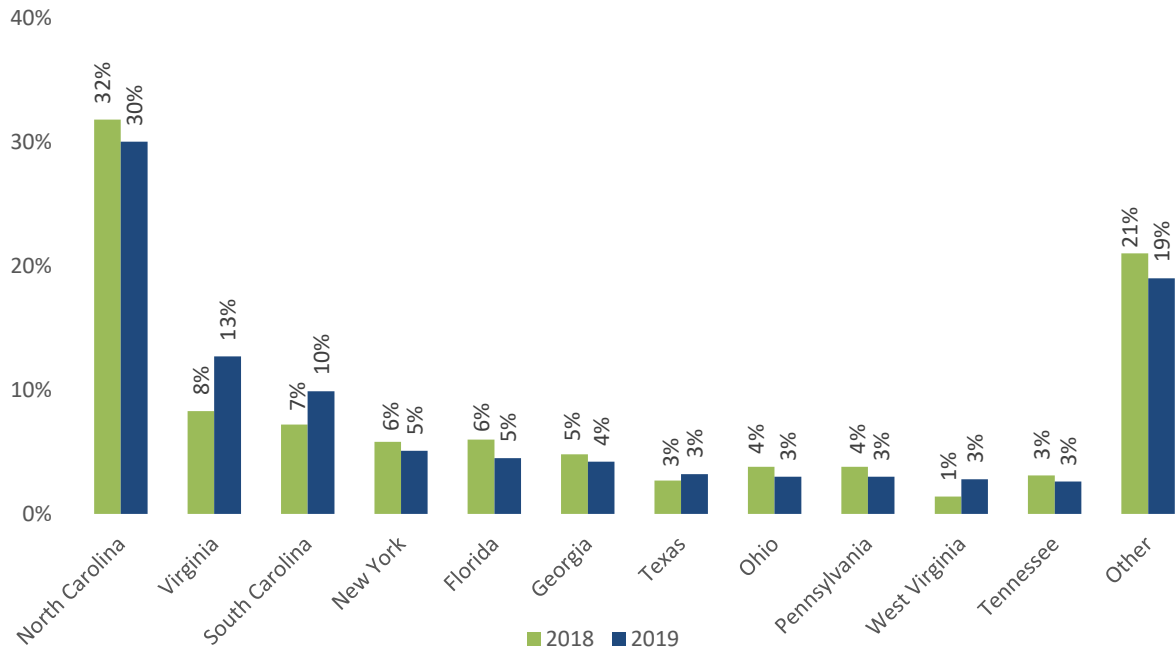
In 2019, personal auto was most used form of transportation (69%) to the Piedmont Region, while sixteen percent traveled by air.



Origin of Visitors

In 2019, the top states of origin for Piedmont Region overnight visitors included North Carolina (30%), Virginia (13%), South Carolina (10%), New York (5%), Florida (5%), Georgia (4%) and Texas (3%). The proportion of visitors to the Piedmont from Virginia, South Carolina and West Virginia increased from 2018 to 2019.

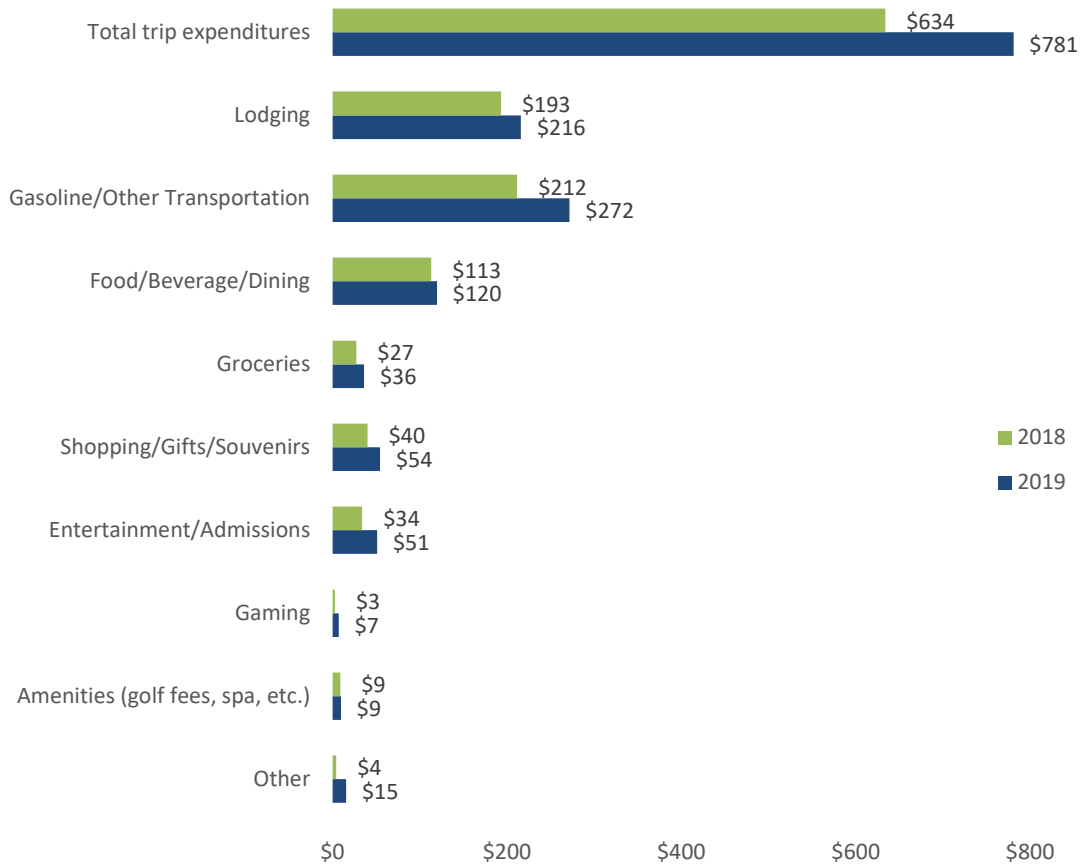
2019 Top States of Origin of Overnight Visitors to North Carolina's Piedmont Region



Amount Spent in Piedmont Region

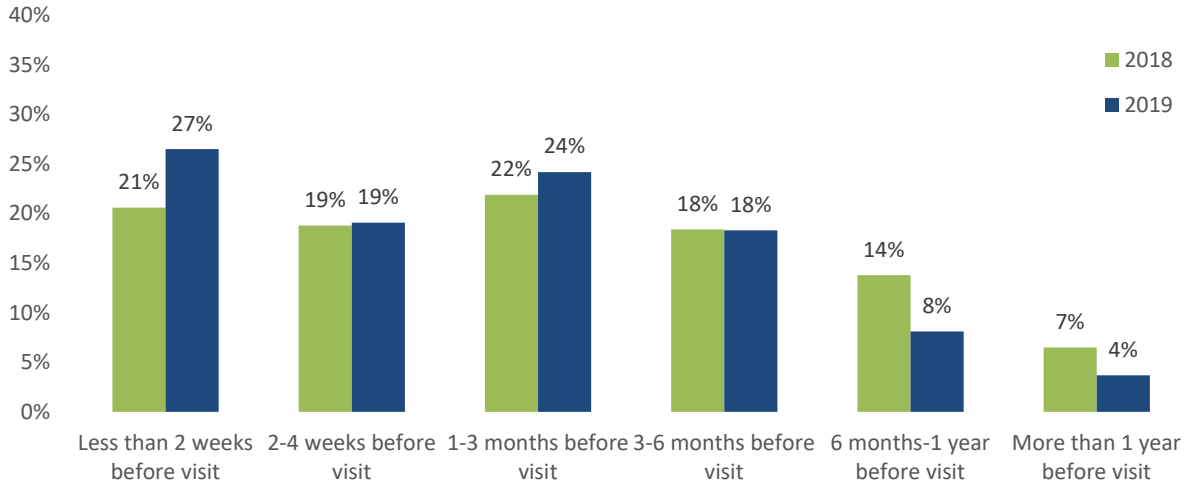
The average overnight visitor party spending in the Piedmont Region was \$781 up twenty-three percent from 2018. Most of the increases were in the lodging and transportation categories, likely due to the longer length of stay in 2019.

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



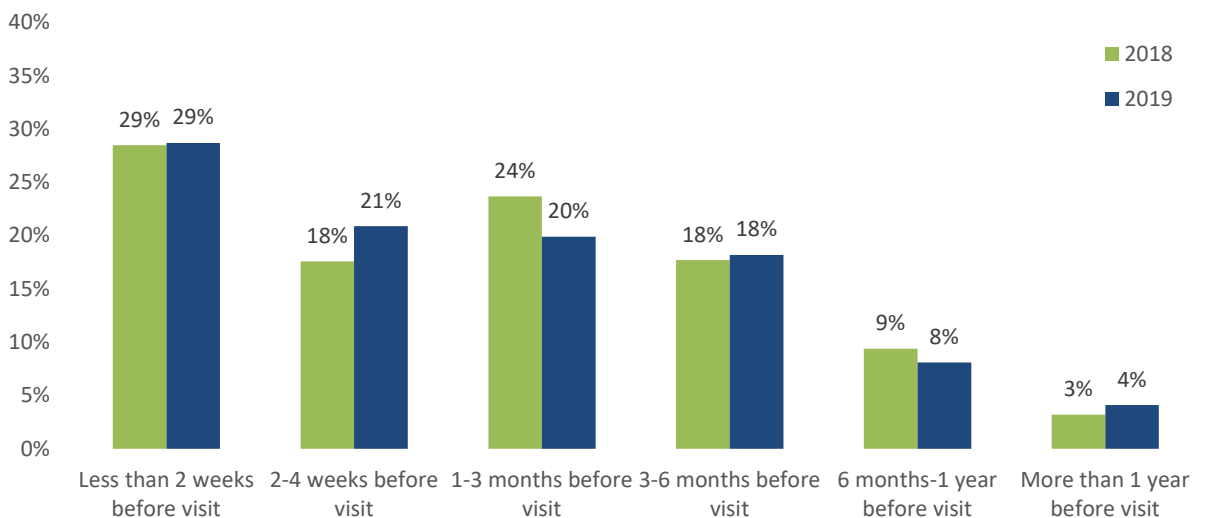
Travel Planning to Piedmont Region

2019 Length of Time to *Consider* NC as Travel Destination



Piedmont Region overnight visitors consider and decide to visit North Carolina within a shorter time frame than North Carolina visitors overall. Forty-six percent of Piedmont Region visitors *considered* the state one month or less ahead of travel, and nearly fifty percent *decided* to visit less than one month prior to travel.

2019 Length of Time to *Decide On* NC as Travel Destination



Activities

The following chart provides activities participated in by Piedmont Region visitors in 2019. These are not indicative of purpose of trip, but activities participated in while in the North Carolina. Nearly half (46%) of the overnight visitors to the piedmont visited with relatives while in the region. Nearly twenty-eight percent shopped and twenty percent visited friends. Other popular activities included fine dining (20%), rural sightseeing (15%), museums (13%), visiting historic sites (13%) and urban sightseeing (12%). ****Note that responses to this question are not mutually exclusive and percentages do not equal 100%. Therefore, proportions should not be aggregated to combine categories of activities. Also note that these activities do not imply purpose of trip.***

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

Activity	2018	2019
Visiting relatives	33.8%	46.1%
Shopping	26.6%	27.7%
Visiting friends	16.7%	20.4%
Fine dining	14.3%	20.2%
Rural sightseeing	7.8%	15.3%
Museums	7.7%	13.0%
Historic sites/churches	10.0%	12.7%
Urban sightseeing	8.6%	11.6%
State park/Monument/Recreation area	5.6%	7.8%
Hiking/Backpacking/Canyoneering	4.5%	7.1%
Local/folk arts/crafts	3.8%	6.8%
Old homes/mansions	3.8%	6.8%
Craft Breweries	5.8%	6.6%
Nightclub/dancing	5.8%	6.5%
Art galleries	3.5%	6.1%
Fishing	3.1%	6.1%
Wildlife viewing	4.4%	6.0%
Zoos/Aquariums Aviaries	3.0%	5.8%
Musical performance/show	3.9%	5.7%
Gardens	3.8%	5.7%
Nature travel/ecotouring	2.9%	4.6%
National park/Monument/Recreation area	5.5%	4.1%
Other nature (photography, rockhounding, etc.)	2.7%	3.9%
Bird watching	3.4%	3.7%
ATV/Four-wheeling	1.3%	3.7%
Special events/Festivals	2.6%	3.6%
Casino/gaming	3.5%	3.3%
Wine tasting/winery tour	3.1%	3.2%
Youth/Amateur/Collegiate/Sporting Event <u>Spectator</u>	2.8%	3.1%
Golf	3.8%	3.0%
Theater/drama	3.4%	2.9%
Sport Events-Major/Professional	2.0%	2.9%
Theme park/Amusement park/Water park	2.3%	2.8%
Musical Theater	1.3%	2.8%

Demographic Profile of North Carolina Overnight Visitors to the Piedmont Region

Nearly two-thirds of the Piedmont Region’s overnight visitors (61.5%) of the visitors are married and twenty-four percent have never married. Fourteen percent of the region’s visitors are divorced, widowed or separated.

The largest proportion of North Carolina Piedmont Region overnight visitors classify themselves as white (76.6%), and sixteen percent classify themselves as black/African American.

The average Piedmont Region visitor is 47 years old and nearly two-thirds (59.3%) of regional overnight visitor parties have a household head with a college degree or higher.

The average household income of a visitor party to the Piedmont Region in 2019 was \$89,580. More than half (54.0%) of the visitor parties that traveled to North Carolina’s Piedmont Region in 2019 had a household income \$75,000 or over. Twenty-five percent had a household income of over \$125,000.

Two-thirds (66.8%) of overnight visitor parties reported that the head of household is employed, while nineteen percent are retired. The remainder reported “not employed” as work status.

The average household size of a North Carolina Piedmont Region overnight visitor party in 2019 was 2.7.

2019 Top Advertising Markets

In 2019, the top advertising markets sending overnight visitors to **North Carolina's Piedmont Region** were Charlotte (8.8%), Raleigh-Durham-Fayetteville (8.3%), New York, NY (6.1%), Washington DC (5.5%), Greensboro-High Point-Winston Salem (4.9%), Greenville-New Bern-Washington (4.4%), and Atlanta (3.1%). Advertising markets correspond with Nielsen's Designated Market Areas (DMAs).

Top Advertising Markets of Origin for Overnight Piedmont Region Visitors

<i>DMA of Origin</i>	<i>2018 % of Piedmont Visitors</i>	<i>2019 % of Piedmont Visitors</i>	<i>2018 Piedmont Share of Total NC Visitors from DMA</i>	<i>2019 Piedmont Share of Total NC Visitors from DMA</i>
Charlotte	10.8%	8.8%	48.4%	31.8%
Raleigh-Durham (Fayetteville)	8.2%	8.3%	37.0%	32.5%
New York, NY	7.1%	6.1%	65.8%	69.0%
Washington DC Metro	4.6%	5.5%	46.4%	51.2%
Greensboro-High Point-Winston Salem	4.7%	4.9%	41.3%	50.0%
Greenville-New Bern-Washington	2.7%	4.4%	67.9%	49.3%
Atlanta	3.9%	3.1%	31.0%	33.8%
Myrtle Beach-Florence	0.9%	2.7%	25.0%	77.8%
Greenville-Spartanburg-Asheville	5.1%	2.6%	39.8%	34.4%
Charleston, SC	1.1%	2.4%	66.7%	59.4%
Augusta	0.1%	2.3%	100.0%	64.3%
Philadelphia	2.7%	2.1%	57.6%	69.6%
Roanoke-Lynchburg	1.7%	1.9%	54.5%	68.2%
Jacksonville, FL	1.5%	1.7%	76.9%	81.3%
Charleston-Huntington	1.2%	1.6%	56.3%	85.7%
Bluefield-Beckley-Oak Hill	1.3%	1.5%	90.0%	92.3%
Dallas-Ft. Worth	1.0%	1.5%	77.8%	85.7%
Norfolk-Portsmouth-Newport News	2.1%	1.5%	39.5%	33.3%
Chicago	0.9%	1.5%	85.7%	85.7%
Baltimore	1.1%	1.5%	47.1%	66.7%

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

%

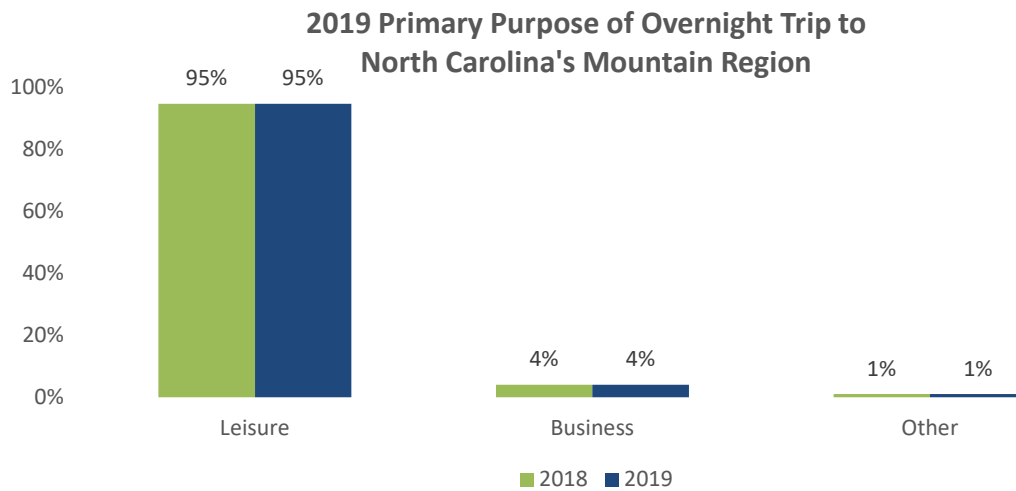
2019 Domestic Mountain Region Visitor Profile

- ◆ In 2019, 26 percent of North Carolina visitors traveled to North Carolina’s Mountain Region, approximately 12.7 million person-trips (approximately 10.4 million overnight person-trips). For marketing purposes, the Mountain Region is made up of the 23 western-most counties of North Carolina. *Note that the regional volume totals do not sum to the statewide volume total, as some visitors travel to multiple geographic regions in one visit.
- ◆ Ninety percent of all domestic visitors (95 percent of overnight visitors), came to the Mountain Region for pleasure purposes, while five percent of all visitors (4 percent of overnight visitors) came to conduct business (includes meeting/convention).
- ◆ Travel to the mountains of North Carolina was heaviest in the spring and summer. The summer (June – August) had the highest proportion of visitors, with thirty-one percent of all 2019 mountain visitors. The spring (March - May) had with twenty-seven percent of visitors, followed by winter with more than twenty-one percent. The fall (September - November) welcomed twenty percent of all mountain visitors.
- ◆ Overnight visitors to the Mountain Region in 2019 spent an average of 3.5 nights in the region.
- ◆ Sixty-two percent of Mountain Region visitors lodged in a hotel/motel, while nearly twenty percent stayed at a private home. Four percent stayed in a rental home or an RV/tent/campground. Two percent lodged in a personal second home/condo. Nine percent of visitors to the region reported staying in a shared economy property in 2019.
- ◆ The average party size for all Mountain Region visitors was 2.2 people (2.2 for overnight parties). Twenty-seven percent of all travel parties to the region included children in the party (30 percent of overnight parties).
- ◆ Ninety-two percent of *overnight* travelers to the Mountain Region drove (includes personal automobile, rental vehicle, RV/camper), while nearly seven percent traveled by air.
- ◆ In 2019, the average trip expenditure in the Mountain Region was \$662. The average trip expenditure for overnight visitors to the Mountain Region was \$788. Daytrip parties to the Mountain Region spent approximately \$221 per visit.
- ◆ The top states of origin of *overnight* visitors to the Mountain Region were North Carolina (46%), Georgia (10%), South Carolina (10%), Florida (7%), Virginia (5%) and Tennessee (3%).
- ◆ Forty-eight percent of the households (51 percent of overnight) that traveled to North Carolina’s Mountain Region in 2019 had a household income over \$75,000.
- ◆ In 2019, Charlotte (18.2%), was the top DMA of origin for *overnight* travelers to the Mountain Region, followed by Atlanta (10.3%), Raleigh/Durham/Fayetteville (10.2%) Greenville/Spartanburg/Anderson/Asheville (8.9%), and Washington DC (4.0%).

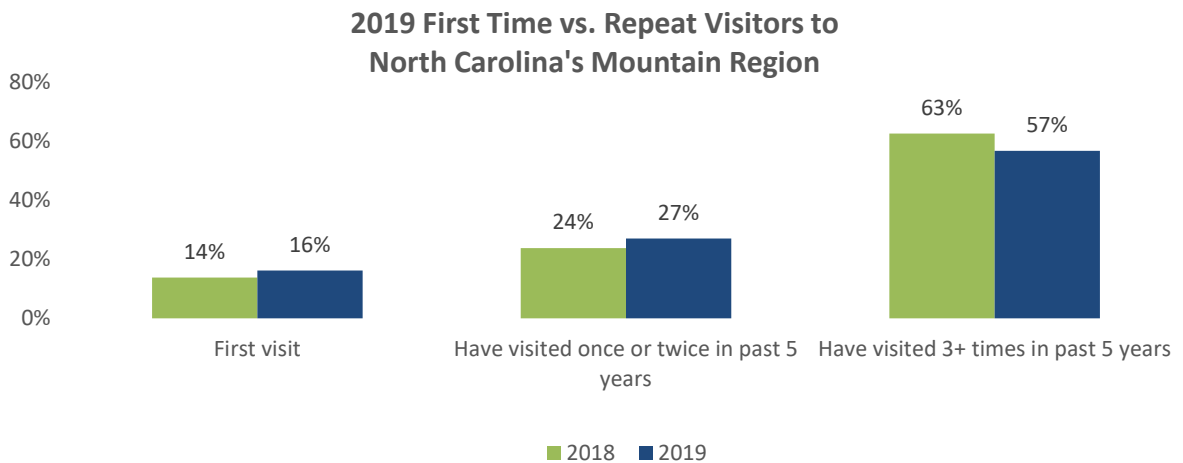
Mountain Region Overnight Visitor Profile

Main Purpose of Visit

In 2019, ninety-five percent of domestic overnight visitors came to the Mountain Region for leisure purposes, which included visiting friends and relatives, outdoor recreation and entertainment/sightseeing. Four percent of domestic overnight visitors came for general business, convention, seminar or other group meeting.

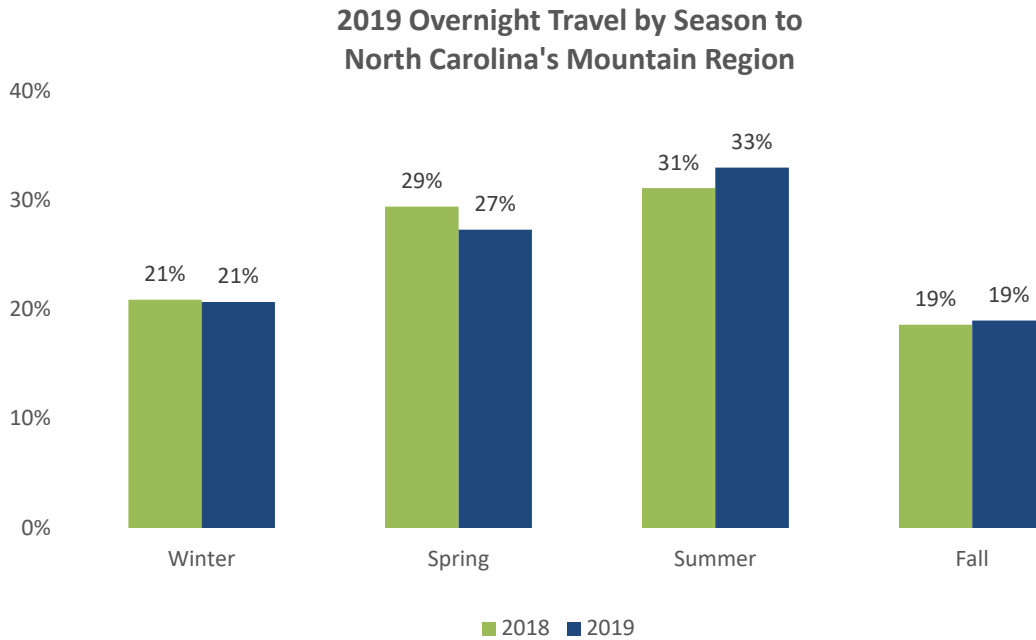


The proportion of visitors to North Carolina’s Mountain Region who were first time visitors increased from fourteen percent in 2018 to sixteen percent in 2019, though the majority of overnight visitors (57%) have visited more than three times in the past five years.



Travel Volume by Season

When examining visitation based on the typical seasonal schedule, the summer season (June through August) was the most popular in terms of proportion of overnight visitors to the Mountain Region in 2019 with thirty-three percent. The spring season (March through May) followed with twenty-seven percent. Winter (December through February) and fall (September through November) welcomed twenty-one and nineteen percent of visitors respectively.



Average Length of Stay

In 2019, an average of 3.5 nights was spent by visitors to North Carolina’s Mountain Region, up from 2.9 nights in 2018. Data indicates that out-of-state visitors stay an average of 3.8 nights, while in-state visitors stay an average of 3.2 nights.

Travel Party Size

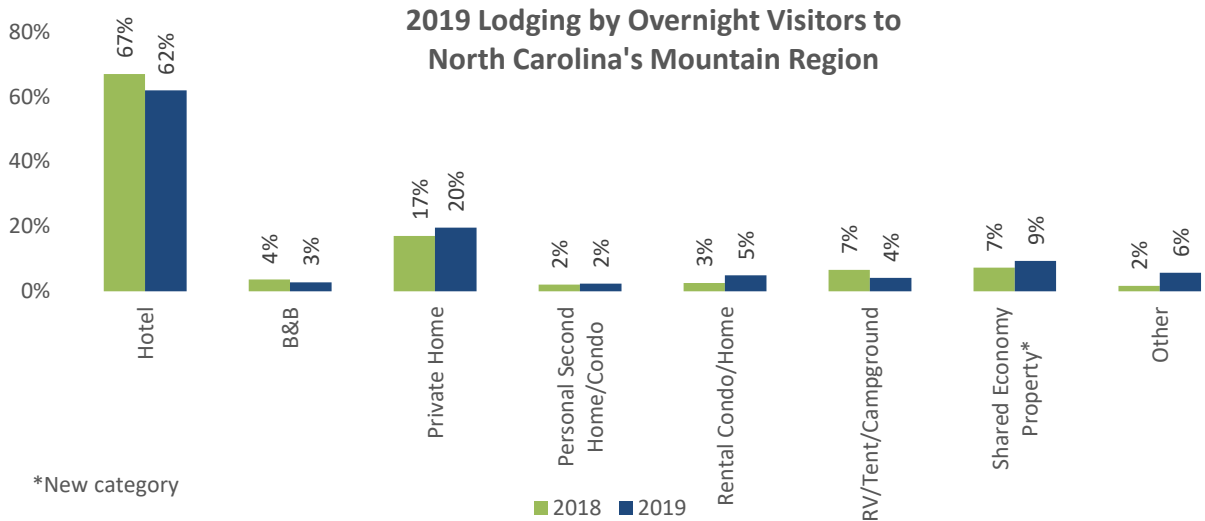
The average travel party size for Mountain Region overnight visitors in 2019 was 2.2 people, slightly higher than in 2018.

Children on Trip

Thirty percent of overnight visitor parties to the Mountain Region included children. Among those who traveled with children, the average number of children on trips was 2.2.

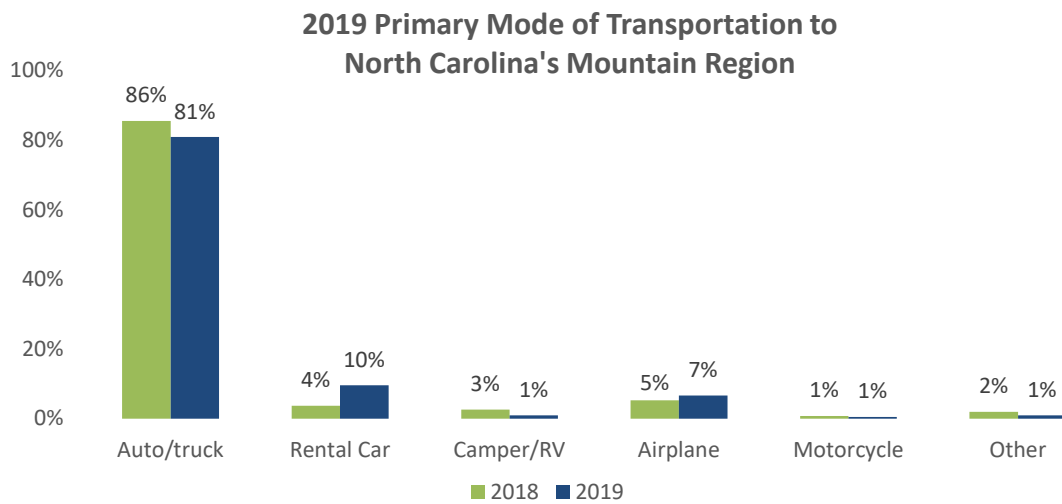
Lodging Used in Mountain Region

In 2019, nearly two-thirds of Mountain Region visitors stayed in a hotel/motel, twenty percent lodged in a private home, three percent stayed in a bed and breakfast and five percent stayed in a rental home/condo. Data indicated that approximately nine percent of Mountain Region visitors chose to use some type of shared economy lodging, such as AirBnB or VRBO. It should be noted that some visitors use more than one type of accommodation during a visit, so totals equal more than 100%.



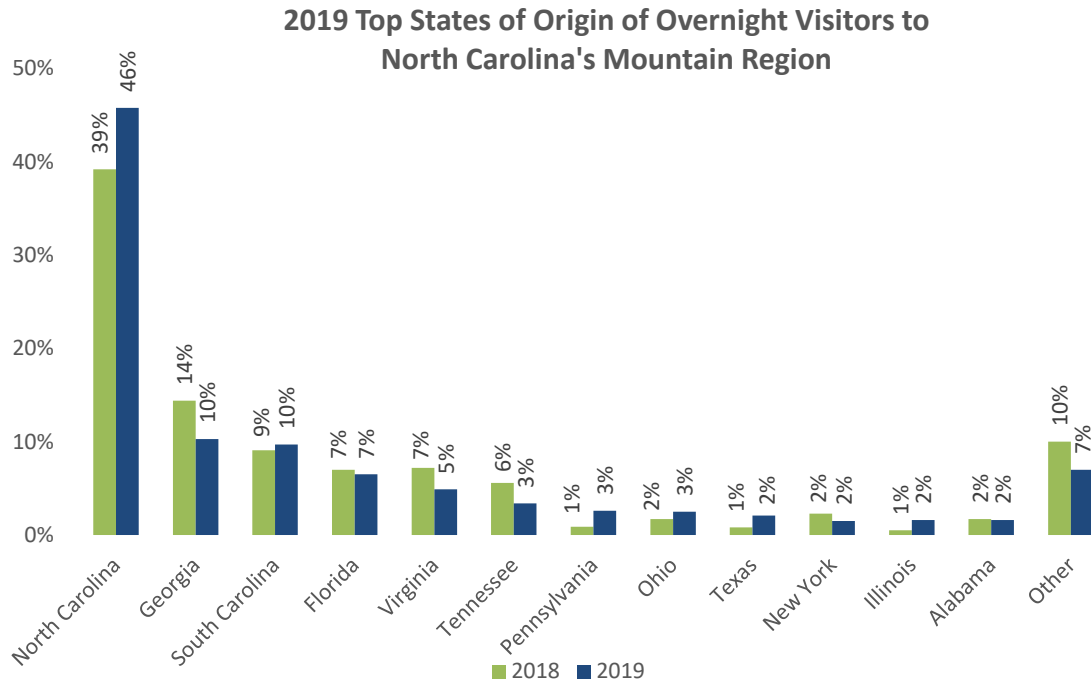
Mode of Transportation

In 2019, the personal auto was by far the dominant form of transportation (81%) for overnight visitors to the Mountain Region, while seven percent traveled by air.



Origin of Visitors

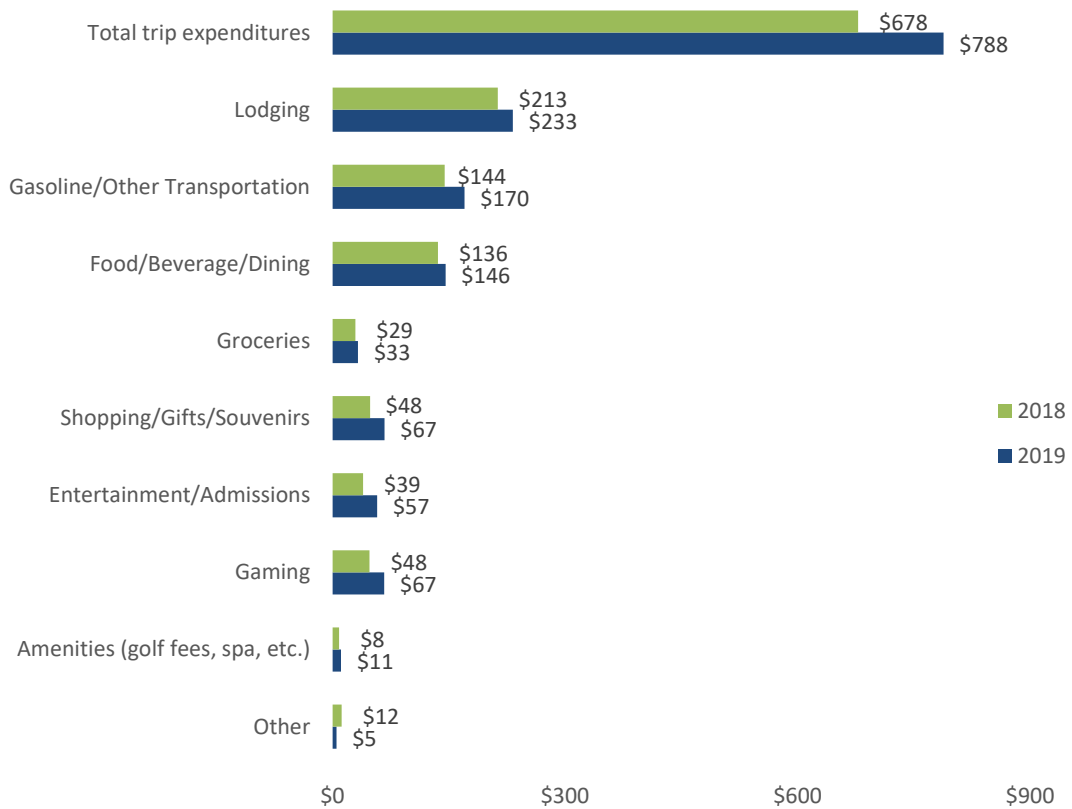
In 2019, the top states of origin for Mountain Region overnight visitors included North Carolina (46%), Georgia (10%), South Carolina (10%), Florida (7%), Virginia (5%) and Tennessee (3%). The proportion of in-state visitors increased from 39 percent in 2018 to 46 percent in 2019.



Amount Spent in Mountain Region

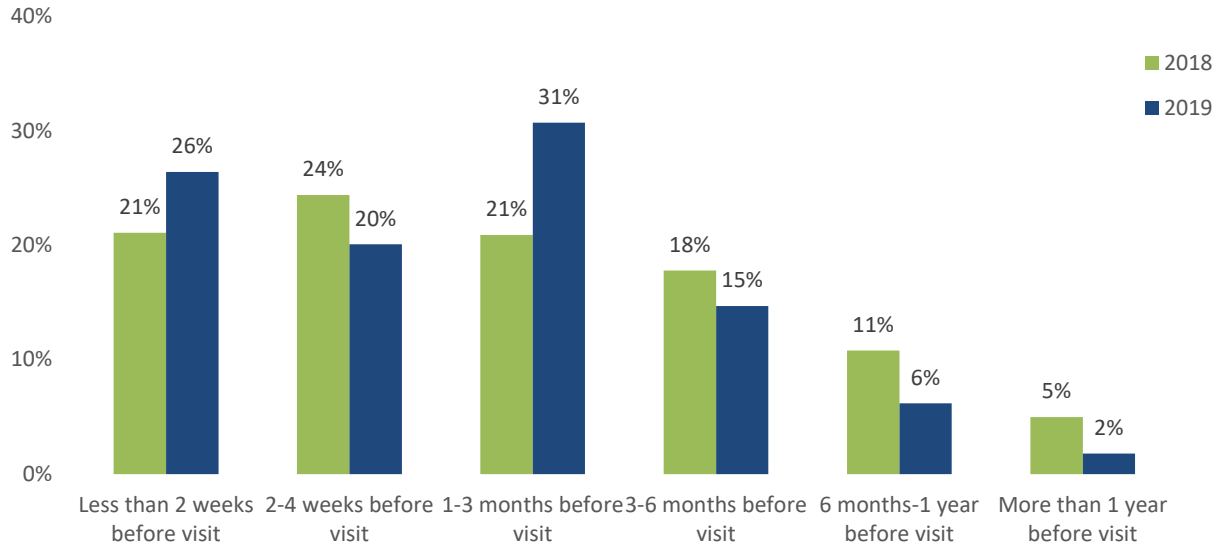
The average overnight visitor party spending in the Mountain Region was \$788, up from \$678 in 2018. All spending categories showed increases. Mountain Region length of stay increased in 2019 contributing to the higher trip level spending.

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



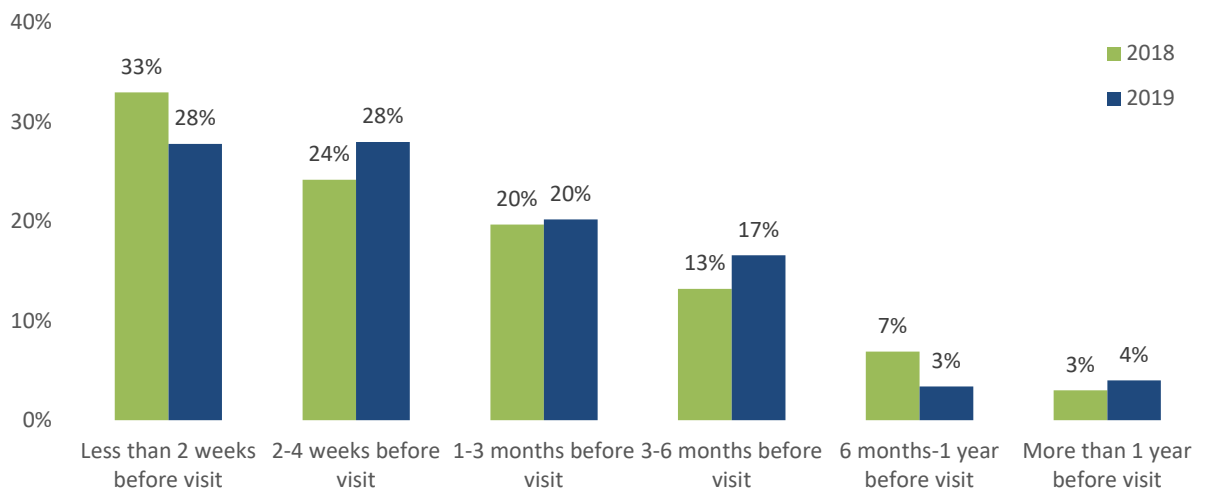
Travel Planning to Mountain Region

2019 Length of Time to *Consider* NC as Travel Destination



Forty-six percent of Mountain Region visitors *considered* the state one month or less ahead of travel, and eight percent *considered* the visit more than six months prior to travel. More than half of the visitors made the decision one month or less ahead of travel.

2019 Length of Time to *Decide On* NC as Travel Destination



Activities

The following table provides activities participated in by Mountain Region visitors in 2019. These are not indicative of purpose of trip, but what activities visitors participate in while in North Carolina.

***Note that responses to this question are not mutually exclusive and percentages do not equal 100%. Therefore, proportions should not be aggregated to combine categories of activities. Also note that these activities do not imply purpose of trip.**

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

Activity	2018	2019
Rural sightseeing	27.9%	26.9%
Shopping	26.9%	26.5%
Historic sites/churches	17.8%	24.3%
Visiting relatives	18.0%	20.9%
Fine dining	14.6%	18.9%
Visiting friends	13.1%	18.0%
State park/Monument/Recreation area	14.3%	16.4%
Hiking/Backpacking/Canyoneering	19.0%	15.8%
Local/folk arts/crafts	11.5%	15.3%
Old homes/mansions	11.2%	15.1%
Craft Breweries	13.1%	14.1%
Wildlife viewing	13.7%	13.6%
Gardens	9.5%	13.4%
Museums	12.0%	13.1%
Casino/gaming	11.1%	12.9%
National park/Monument/Recreation area	13.9%	12.7%
Urban sightseeing	11.6%	12.6%
Art galleries	9.2%	12.3%
Wine tasting/winery tour	8.4%	10.6%
Fishing	2.4%	8.4%
Nature travel/ecotouring	6.8%	7.5%
Other nature (photography, rockhound, etc.)	8.7%	7.0%
Musical performance/show	7.8%	6.6%
Nightclub/dancing	5.6%	6.0%
Zoos/Aquariums/Aviaries	3.7%	5.9%
Theater/Drama	1.2%	4.4%
Spa/Health Club	1.8%	4.3%
Bird Watching	5.7%	4.2%
Native American ruins	3.8%	4.2%
Whitewater rafting/kayaking/canoeing etc.	1.3%	4.0%
Theme Park/Amusement Park/Water Park	1.3%	3.1%
Caverns	0.7%	2.9%
Area where a TV show or movie was filmed	1.0%	2.6%
Farms/Ranches/Agri-tours	1.4%	2.5%
Special Events/Festivals	3.5%	2.5%
Musical Theater	1.4%	2.5%
Rock/mountain climbing	1.3%	2.2%

2019 Demographic Profile of North Carolina Overnight Visitors to the Mountain Region

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

The largest proportion of North Carolina Mountain Region overnight visitors classify themselves as white (87%), and nearly seven percent classify themselves as black/African American. Three percent reported that they are Asian/Pacific Islander.

The average Mountain Region visitor is 46 years old, and more than two-thirds (68%) of Mountain Region overnight visitor parties have a household head with a college degree or higher.

The average household income of an overnight visitor party to the Mountain Region in 2019 was \$85,650. Half (51%) of the overnight visitor parties that traveled to North Carolina’s Mountain Region in 2019 had a household income \$75,000 or over. Twenty-one percent had a household income of over \$125,000.

Nearly two-thirds of overnight visitor parties reported that the head of household is employed, while twenty-two percent are retired. The remainder reported “not employed” as work status.

The average household size of a North Carolina Mountain Region overnight visitor party in 2019 was 2.8.

2019 Top Advertising Markets

In 2019, the top advertising markets sending overnight visitors to **North Carolina's Mountain Region** were Charlotte (18.2%), Atlanta (10.3%), Raleigh/Durham (10.2%), Greenville-Spartanburg-Asheville-Anderson (8.9%), Washington DC (4.0%) and Greensboro-High Point-Winston Salem (3.6%). As compared to 2018, in terms of proportion of visitors, the region saw growth from the Charlotte, Raleigh-Durham and Washington DC markets. Advertising markets correspond with Nielsen's Designated Market Areas (DMAs).

Top Advertising Markets of Origin for Overnight Mountain Region Visitors

<i>DMA of Origin</i>	<i>2018 % of Total NC Visitors to Region</i>	<i>2019 % of Total NC Visitors to Region</i>	<i>2018 Mountain Share of NC Visitors from DMA</i>	<i>2019 Mountain Share of NC Visitors from DMA</i>
Charlotte	14.3%	18.2%	33.1%	32.3%
Atlanta	13.1%	10.3%	54.0%	54.1%
Raleigh-Durham (Fayetteville)	8.4%	10.2%	19.5%	19.7%
Greenville-Spartanburg-Asheville-Anderson	13.3%	8.9%	54.5%	57.4%
Washington, DC	2.1%	4.0%	10.1%	17.4%
Greensboro-High Point-Winston Salem	4.0%	3.6%	18.8%	17.9%
Columbia	2.9%	2.8%	45.5%	42.3%
Greenville-New Bern-Washington	0.7%	2.7%	10.7%	15.5%
West Palm Beach-Ft. Pierce	1.6%	2.3%	46.2%	52.9%
Tampa-St. Petersburg	2.3%	2.1%	32.0%	50.0%
Chattanooga	1.3%	2.0%	71.4%	88.9%
Nashville	1.7%	1.8%	28.6%	41.2%
Seattle-Tacoma	0.1%	1.7%	100%	100.0%
Wilmington	1.2%	1.6%	17.4%	31.0%
Charleston, SC	0.5%	1.5%	16.7%	18.8%
New York	2.5%	1.3%	11.8%	7.0%
Detroit	0.2%	1.3%	9.1%	41.7%
Augusta	0.3%	1.2%	100.0%	17.9%
Knoxville	2.9%	1.1%	43.5%	25.0%
Myrtle Beach-Florence	2.2%	1.1%	33.3%	14.8%

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

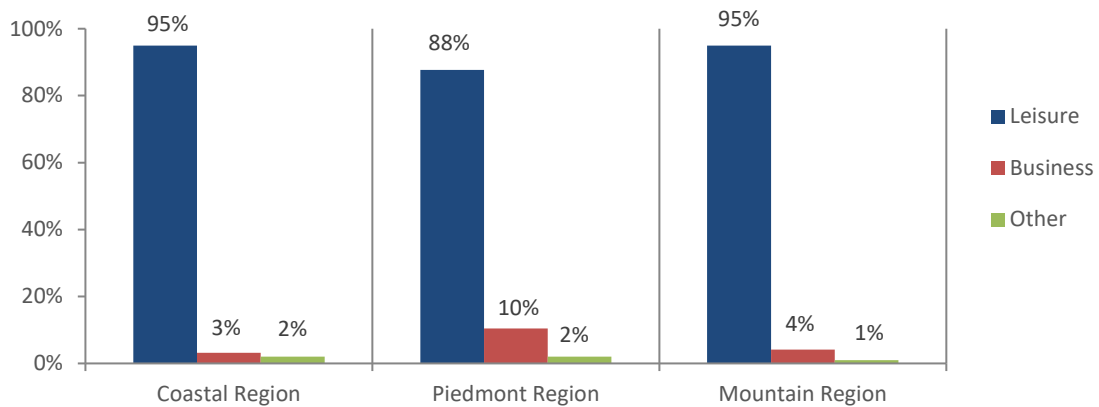
2019 Regional Comparison

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

Purpose of Trip

Not surprisingly, North Carolina's Coastal and Mountain regions had larger shares of visitors travel to the regions for leisure reasons than the Piedmont Region.

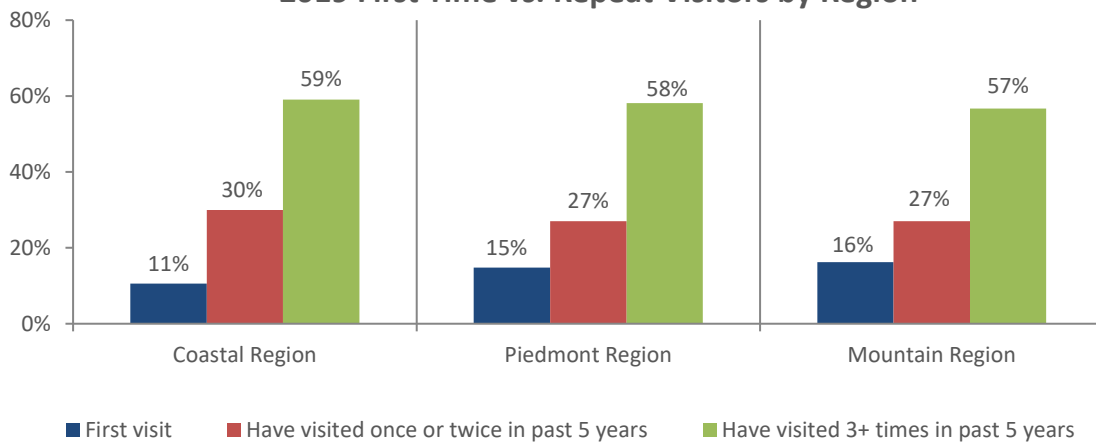
2019 Primary Purpose of Trip by Region



First Time vs. Repeat Visitors

The majority of each region's visitors are repeat visitors, though the Mountain Region saw a slightly larger proportion of first time visitors than the other two regions in 2019.

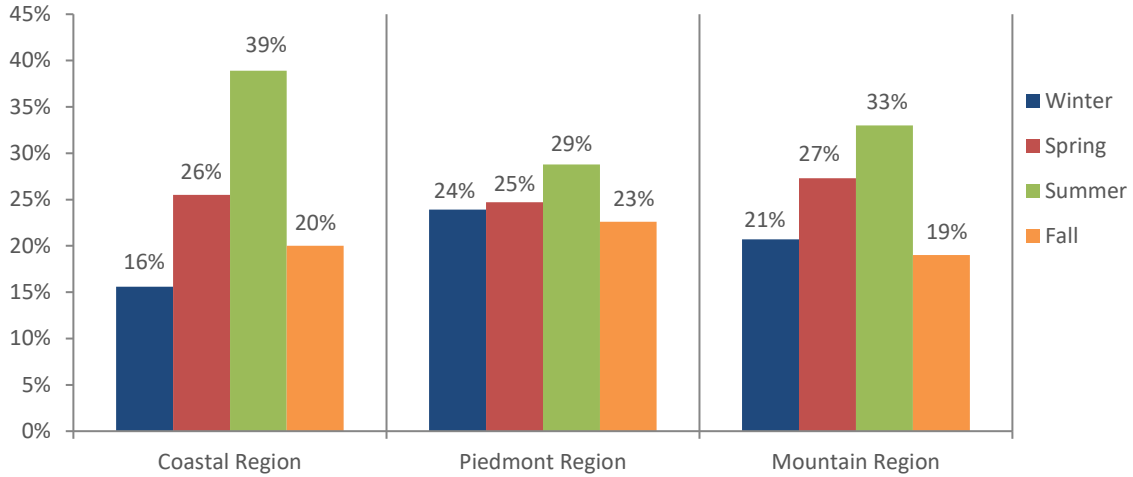
2019 First Time vs. Repeat Visitors by Region



Travel Volume by Season

The seasonal distribution of regional visitors helps understand the flow of travelers through the state. The Coastal Region sees a larger proportion of total visitors during the summer; while the mountain region had larger proportions of visitors during the spring and summer in 2019.

2019 Season of Travel by Region



Average Length of Stay for Overnight Visitors

Coastal Region All Overnight	Piedmont Region All Overnight	Mountain Region All Overnight
4.0 nights	3.9 nights	3.5 nights
Coastal Region Out-of-State	Piedmont Region Out-of-State	Mountain Region Out-of-State
4.6 nights	4.0 nights	3.8 nights
Coastal Region Resident	Piedmont Region Resident	Mountain Region Resident
3.4 nights	3.6 nights	3.2 nights

Travel Party Size for Overnight Visitors

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

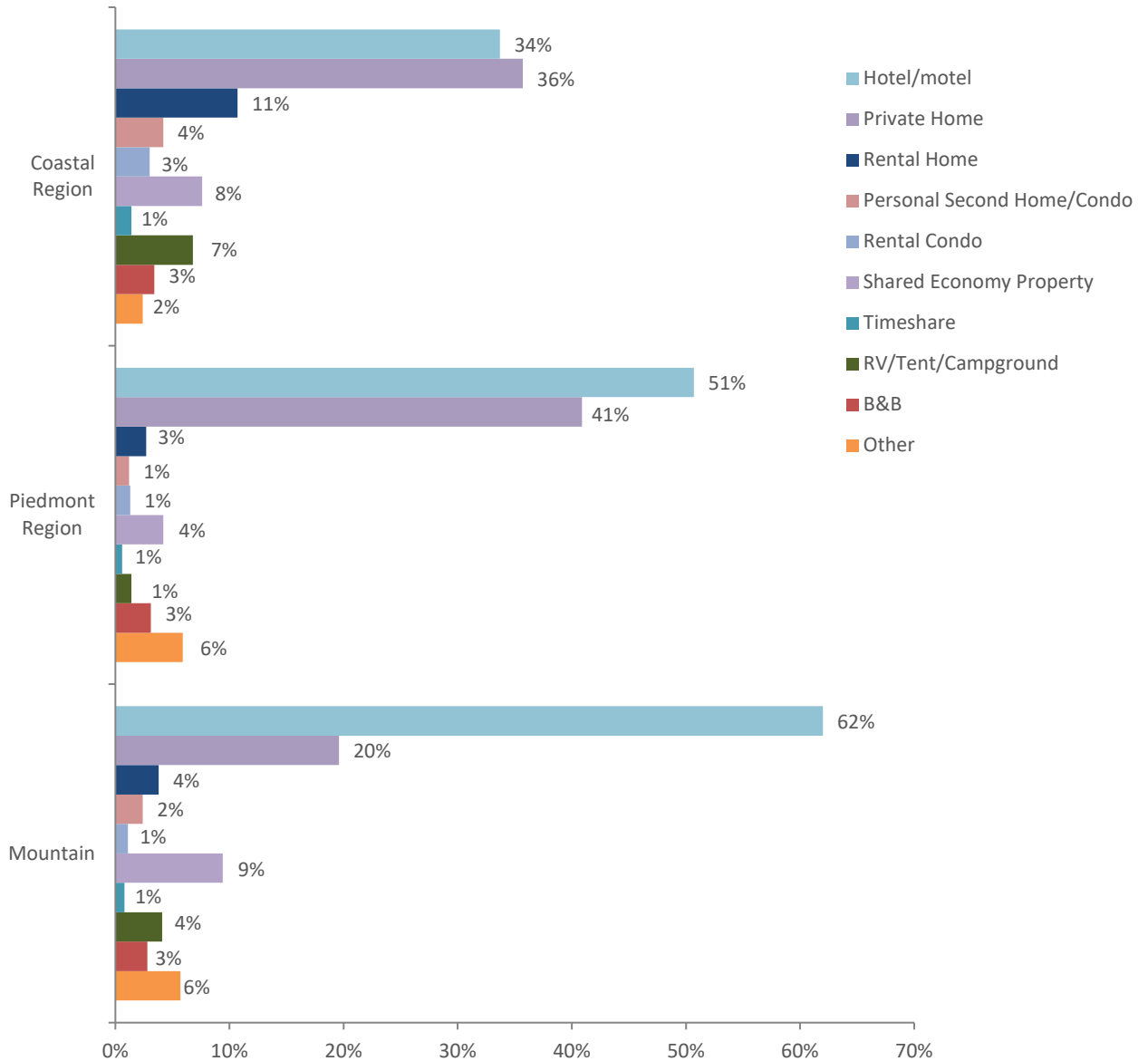
Children on Trip for Overnight Visitors

Coastal Region	Piedmont Region	Mountain Region
41.3%	33.1%	30.1%
Coastal Region Out-of-State	Piedmont Region Out-of-State	Mountain Region Out-of-State
43.8%	34.3%	29.1%
Coastal Region Resident	Piedmont Region Resident	Mountain Region Resident
39.6%	30.5%	31.2%

Lodging Type

Hotels/motels and private homes are the most popular forms of lodging throughout the state, though the proportions vary by region. Mountain Region visitors use hotels/motels and shared economy properties at a higher proportion than the other regions, while Piedmont Region visitors have a larger proportion of travelers who stay in private homes than the other regions.

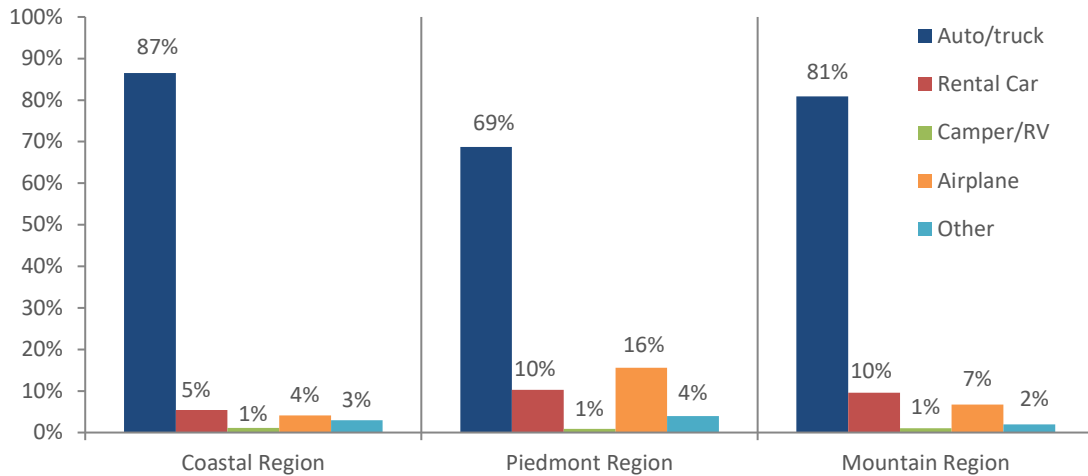
2019 Lodging by Overnight Visitors by Region



Mode of Transportation

Not surprisingly, auto transportation was the primary method of transportation for North Carolina overnight visitors. The Piedmont Region, with the most and largest airports, saw the most overnight travelers using air transportation (16%).

2019 Primary Transportation by Overnight Visitors by Region



Origin of Overnight Visitors

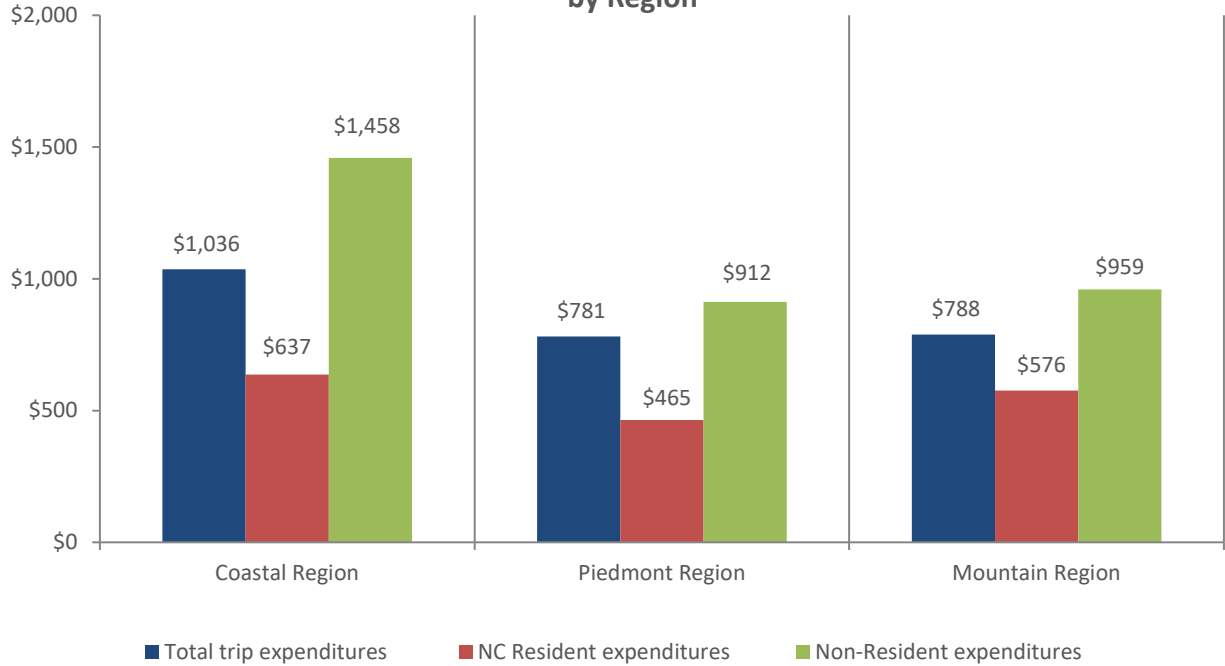
In-state residents comprise the largest proportion of the state’s overnight visitors, and in each of the regions. The other top market states are similar, though there are some differences in rank between regions.

Coastal Region	Piedmont Region	Mountain Region
North Carolina (51.2%)	North Carolina (30.0%)	North Carolina (45.8%)
Virginia (13.9%)	Virginia (12.7%)	Georgia (10.3%)
Pennsylvania (7.4%)	South Carolina (9.9%)	South Carolina (9.7%)
New Jersey (3.5%)	New York (5.1%)	Florida (6.5%)
Maryland (3.3%)	Florida (4.5%)	Virginia (4.9%)
South Carolina (2.9%)	Georgia (4.2%)	Tennessee (3.4%)
Ohio (2.9%)	Texas (3.2%)	Pennsylvania (2.6%)
West Virginia (2.6%)	Pennsylvania (3.0%)	Ohio (2.5%)
Florida (2.2%)	Ohio (3.0%)	Texas (2.1%)
Georgia (1.8%)	West Virginia (2.8%)	Alabama (1.6%)
New York (1.2%)	Tennessee (2.6%)	Illinois (1.6%)
Tennessee (1.0%)	New Jersey (2.2%)	New York (1.5%)
Kentucky (1.0%)	Maryland (2.2%)	Kentucky (1.3%)

Trip Expenditures

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

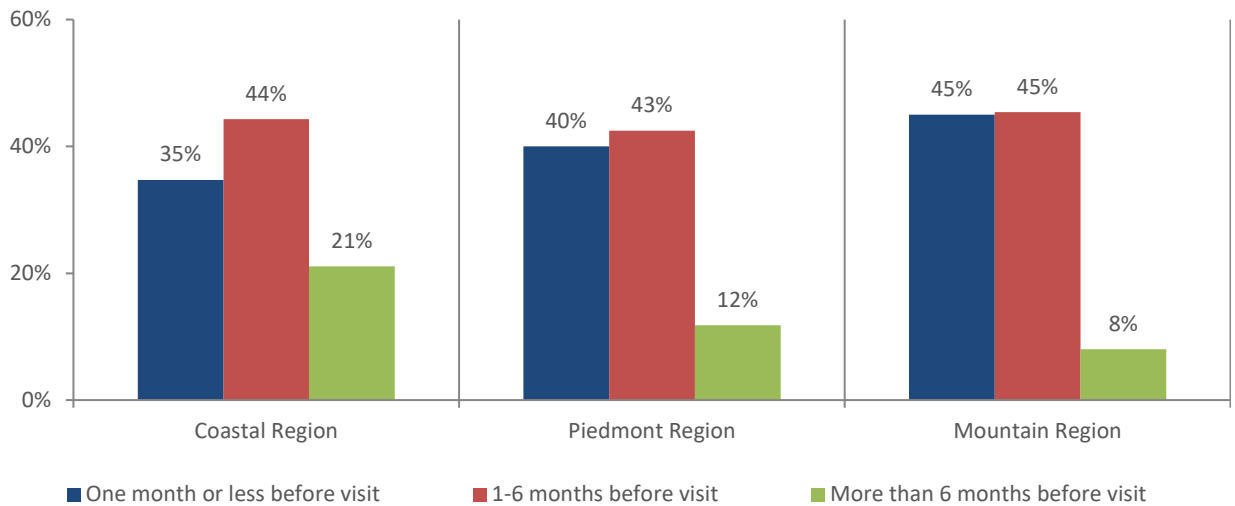
2019 Average Trip Spending by Overnight Visitor Parties by Region



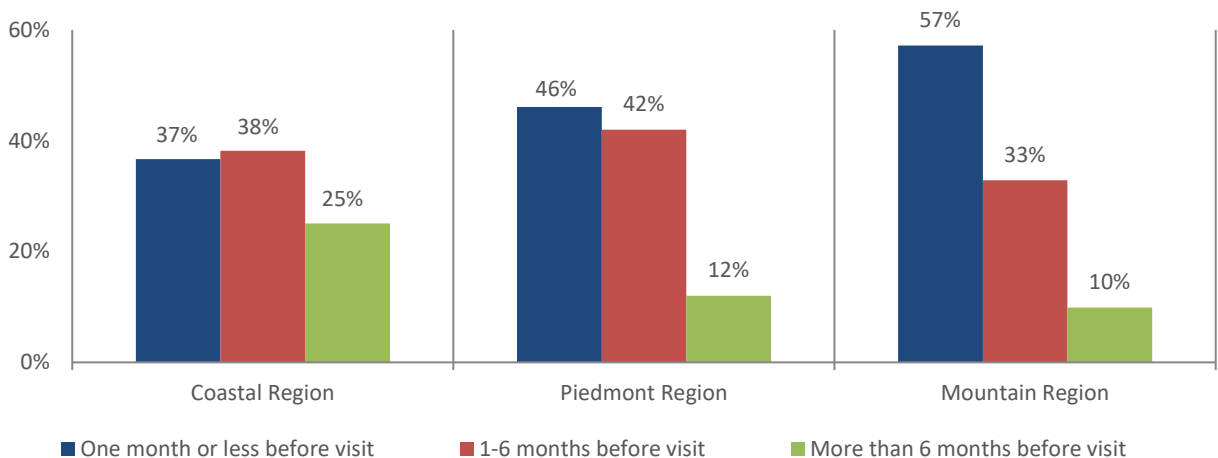
Trip Planning

Visitors to the Coastal Region of North Carolina considered and planned travel to the state farther in advance than did visitors to the Mountain or Piedmont regions. Twenty-one percent of visitors who eventually traveled overnight to the Coastal Region began considering the trip more than six months prior to the visit, while only eight percent of Mountain Region visitors considered the region that far in advance. More than half of mountain visitors decided to visit the region one month or less prior to visit.

How Far in Advance Overnight Trip to North Carolina was Considered



How Far in Advance Overnight Trip to North Carolina was Decided



Activities

Activities participated in by North Carolina overnight travelers in 2019 vary somewhat by region, but common activities between regions include visiting friends and relatives, shopping and sightseeing. Mountain region visitors tend to participate in more activities per trip than other regions. ***Note that responses to this question are not mutually exclusive and percentages do not equal 100%. Therefore, proportions should not be aggregated to combine categories of activities. Also note that these activities do not imply purpose of trip.**

Coastal Region	Piedmont Region	Mountain Region
Beach	Visiting relatives	Rural sightseeing
Shopping	Shopping	Shopping
Visiting Relatives	Visiting friends	Historic sites/churches
Historic Sites/Churches	Fine dining	Visiting relatives
Fine Dining	Rural sightseeing	Fine dining
Rural Sightseeing	Museums	Visiting friends
Zoos/Aquariums/Aviaries	Historic sites/churches	State park/Monument/Recreation area
Museums	Urban sightseeing	Hiking/Backpacking/Canyoneering
Visiting Friends	State park/Monument/Recreation area	Local/folk arts/crafts
Fishing (fresh or saltwater)	Hiking/Backpacking/Canyoneering	Old homes/mansions
State Park/Monument/Recreation area	Local/folk arts/crafts	Craft Breweries
Wildlife Viewing	Old homes/mansions	Wildlife viewing
Urban Sightseeing	Craft Breweries	Gardens
Local/folk arts/crafts	Nightclub/dancing	Museums
Nature Travel/Eco-touring	Art galleries	Casino/gaming
Old Homes/Mansions	Fishing	National park/Monument/Recreation area
Gardens	Wildlife viewing	Urban sightseeing
Craft Breweries	Zoos/Aquariums Aviaries	Art galleries
Golf	Musical performance/show	Wine tasting/winery tour
Bird Watching	Gardens	Fishing
Hiking/Backpacking	Nature travel/ecotouring	Nature travel/ecotouring
National Park/Monument/Recreation area	National park/Monument/Recreation area	Other nature (photography, rockhound, etc.)
Spa/health club	Other nature (photography, rockhounding, etc.)	Musical performance/show
ATV/Fourwheeling	Bird watching	Nightclub/dancing
Rafting/Kayaking/Canoeing	ATV/Four-wheeling	Zoos/Aquariums/Aviaries
Nightclubs/Dancing	Special events/Festivals	Theater/Drama
Other nature (photography, rockhounding, etc.)	Casino/gaming	Spa/Health Club
Biking/Road Biking/Cycling	Wine tasting/winery tour	Bird Watching
Theme Park/Amusement Park/Water Park	Youth/Amateur/Collegiate/Sporting Event Spectator	Native American ruins
Wine Tasting/Winery Tour	Golf	Whitewater rafting/kayaking/canoeing etc.
Theater/drama	Theater/drama	Theme Park/Amusement Park/Water Park
Art Galleries	Sport Events-Major/Professional	Caverns
Special Events/Festivals	Theme park/Amusement park/Water park	Area where a TV show or movie was filmed

2019 Demographic Profile for Overnight Visitor Parties

	Coastal Region	Piedmont Region	Mountain Region
Average age of household head	46 years of age	47 years of age	46 years of age
Education of Household Head			
High school or less	13.8%	14.3%	9.1%
Some college - no degree	26.4%	26.4%	22.9%
Completed college	42.9%	38.9%	50.2%
Post Graduate College	16.9%	20.4%	17.8%
Employment of Household Head			
Employed	63.8%	66.8%	62.9%
Retired	16.6%	18.9%	22.1%
Not employed	19.6%	14.3%	15.0%
Annual Household Income			
Less than \$30,000	13.9%	14.6%	15.4%
\$30,000-\$49,999	10.4%	11.0%	7.1%
\$50,000-\$74,999	25.3%	20.4%	26.4%
\$75,000 & over	50.4%	54.0%	51.1%
Marital Status			
Married	69.3%	61.5%	68.6%
Never married	20.4%	24.4%	20.8%
Divorced, widowed, separated	10.3%	14.1%	10.6%
Ethnicity			
White	88.9%	76.6%	87.3%
Black/African American	5.2%	15.8%	6.5%
American Indian, Aleut Eskimo	1.0%	0.8%	0.6%
Asian or Pacific Islander	1.1%	4.3%	3.2%
Other	3.8%	2.5%	2.4%
Average Household Size	3.0 persons	2.7 persons	2.8 persons

2019 Top Advertising Markets

The top ten advertising markets for the three regions are very similar, but differences can be noted in the ranks. While Raleigh-Durham is the primary market for the Coastal Region, Charlotte is the top market for the Piedmont and Mountain regions.

Coastal Region
Raleigh-Durham-Fayetteville (21.8%)
Charlotte (14.2%)
Washington DC Metro (8.3%)
Greenville-New Bern-Washington (6.9%)
Greensboro-High Point-Winston Salem (5.2%)
Pittsburgh (4.5%)
New York (4.3%)
Richmond-Petersburg (3.7%)
Wilmington (3.0%)
Norfolk-Portsmouth-Newport News (2.6%)
Piedmont Region
Charlotte (8.8%)
Raleigh-Durham-Fayetteville (8.3%)
New York (6.1%)
Washington, DC (5.5%)
Greensboro-High Point-Winston Salem (4.9%)
Greenville-New Bern-Washington (4.4%)
Atlanta, GA (3.1%)
Myrtle Beach-Florence (2.7%)
Greenville-Spartanburg-Asheville (2.6%)
Charleston, SC (2.4%)
Mountain Region
Charlotte (18.2%)
Atlanta, GA (10.3%)
Raleigh-Durham (Fayetteville) (10.2%)
Greenville-Spartanburg-Asheville (8.9%)
Washington DC (4.0%)
Greensboro-High Point-Winston Salem (3.6%)
Columbia (2.8%)
Greenville-New Bern-Washington (2.7%)
West Palm Beach-Ft. Pierce (2.3%)
Tampa-St. Petersburg (2.1%)

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

2019 North Carolina Regional Visitor Profile

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.