



2021 NORTH CAROLINA REGIONAL VISITOR PROFILE

A Publication of Visit North Carolina

A Unit of the Economic Development Partnership of North Carolina

2021 NORTH CAROLINA VISITOR PROFILE

- Visit North Carolina contracts with research company OmniTrak Group, Inc. for data on North Carolina visitors through its TravelTrakAmerica product.
- 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 this report based on this data from TravelTrakAmerica.
- The purpose of this report is to profile the average North Carolina visitor to the three geographic regions of the state.
- At the end of the report, an appendix offers definitions of key travel terms.

Table of Contents

Coastal Visitor Profile Summary - 4


Mountain Visitor Profile Summary - 5

Piedmont Visitor Profile Summary - 6

Visitor Profile - 7

Glossary of Terms - 27

2021 COASTAL VISITOR SUMMARY

- In 2021, approximately 44.4 million person-trips were taken in North Carolina and the state ranked #5 in the U.S. in terms of domestic visitation. Approximately 12 million visitors traveled to the Coastal Region with 83 percent of them being overnight visitors.
- Ninety-one percent of all Coastal Region visitors (94% of overnight visitors) traveled for leisure purposes, while four percent came to conduct business.
- The majority of overnight travelers to the coast in 2021 visited during the summer followed by spring.
- The party size for the average coastal visitor party was 2.8 in 2021. 38 percent of travel parties included children under the age of 18.
- The average Coastal Region visitor party trip expenditure was \$996 in 2021. Overnight visitor parties spent \$1,172 while daytrip parties spent \$225 on average.
- The top states of origin for overnight visitors to the Coastal Region in 2021 were NC, VA, 

2021 MOUNTAIN VISITOR SUMMARY

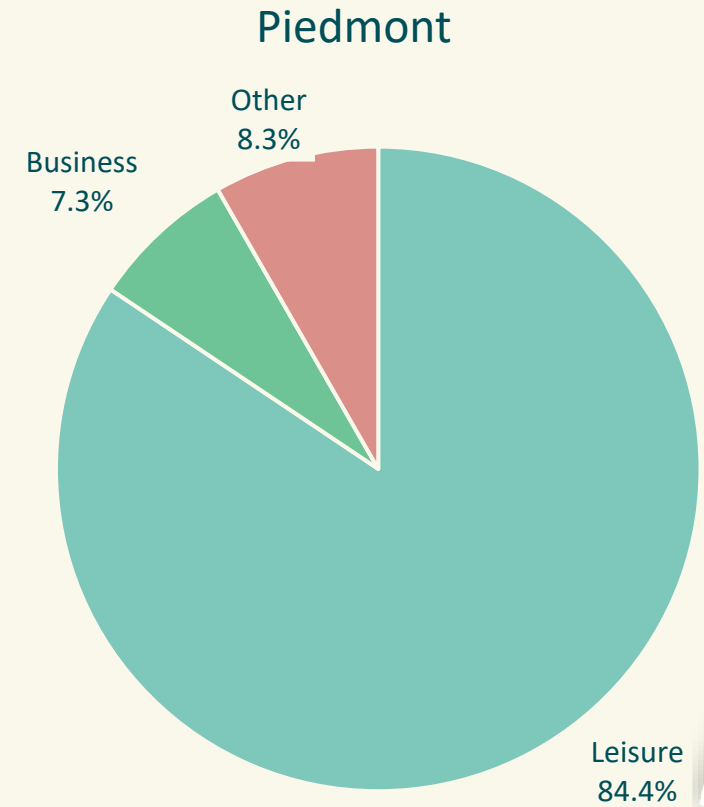
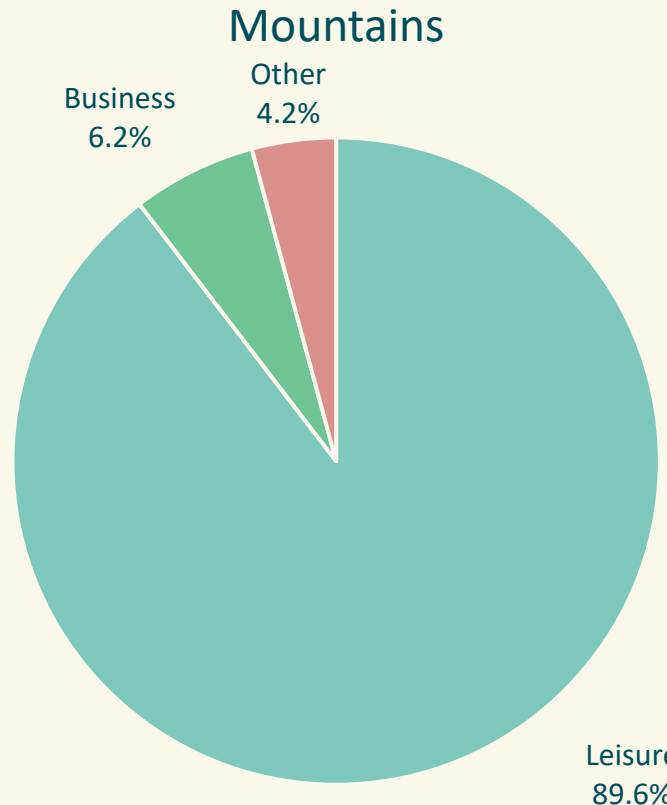
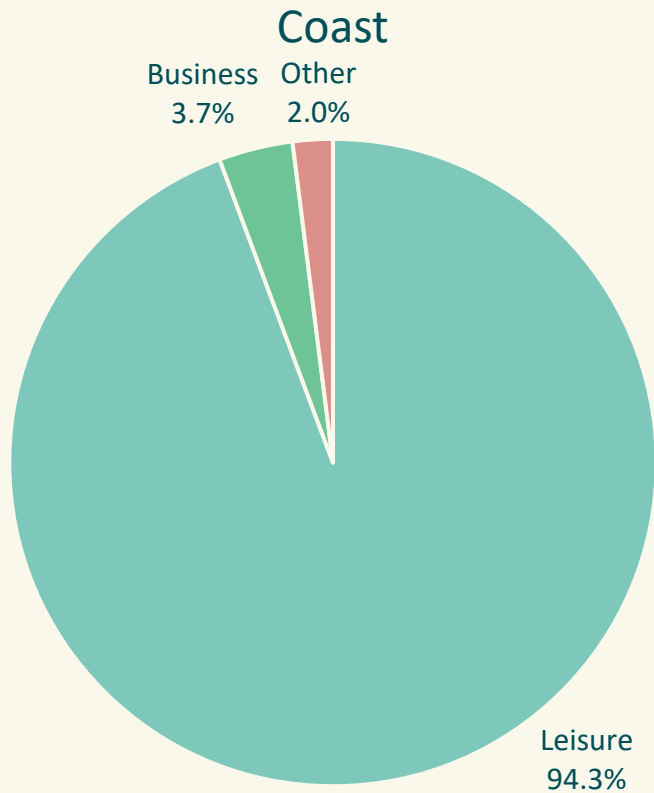
- In 2021, approximately 44.4 million person-trips were taken in North Carolina and the state ranked #5 in the U.S. in terms of domestic visitation. Approximately 12.7 million visitors traveled to the Mountain Region with 73 percent of them being overnight visitors.
- Eighty-eight percent of all mountain visitors (90 percent of overnight visitors) traveled for leisure purposes, while six percent came to conduct business.
- The majority of overnight travelers to the mountains in 2021 visited during the summer and fall.
- The party size for the average mountain visitor party was 2.6 in 2021. 30 percent of travel parties included children under the age of 18.
- The average Mountain Region visitor party trip expenditure was \$662 in 2021. Overnight visitor parties spent \$774 while daytrip parties spent \$303 on average.
- The top states of origin for overnight visitors to the mountains in 2021 were NC, SC, GA, TN, FL, VA, AL, PA and TX.

2021 PIEDMONT VISITOR SUMMARY

- In 2021, approximately 44.4 million person-trips were taken in North Carolina and the state ranked #5 in the U.S. in terms of domestic visitation. Approximately 23 million visitors traveled to the Piedmont Region with 70 percent of them being overnight visitors.
- Eighty-one percent of all piedmont visitors (84 percent of overnight visitors) traveled for leisure purposes, while eight percent came to conduct business.
- The majority of overnight travelers to the piedmont in 2021 visited during the summer and fall.
- The party size for the average piedmont visitor party was 2.3 in 2021. 25 percent of travel parties included children under the age of 18.
- The average Piedmont Region visitor party trip expenditure was \$552 in 2021. Overnight visitor parties spent \$617 while daytrip parties spent \$397 on average.
- The top states of origin for overnight visitors to the piedmont in 2020 were NC, SC, VA, FL, GA, TX, OH, PA, TN and CA.

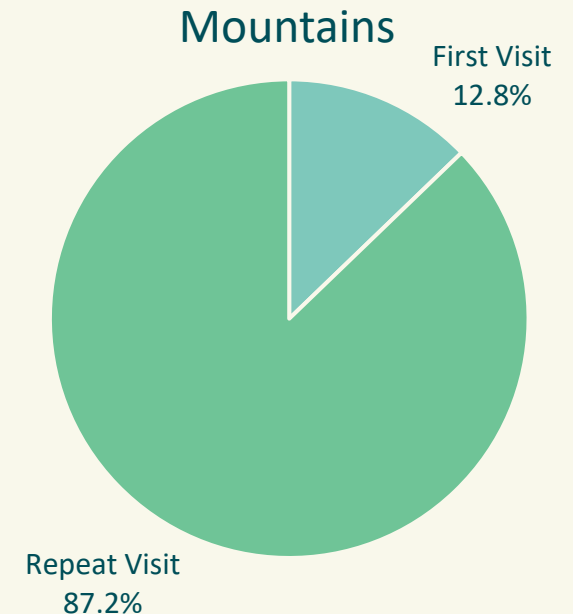
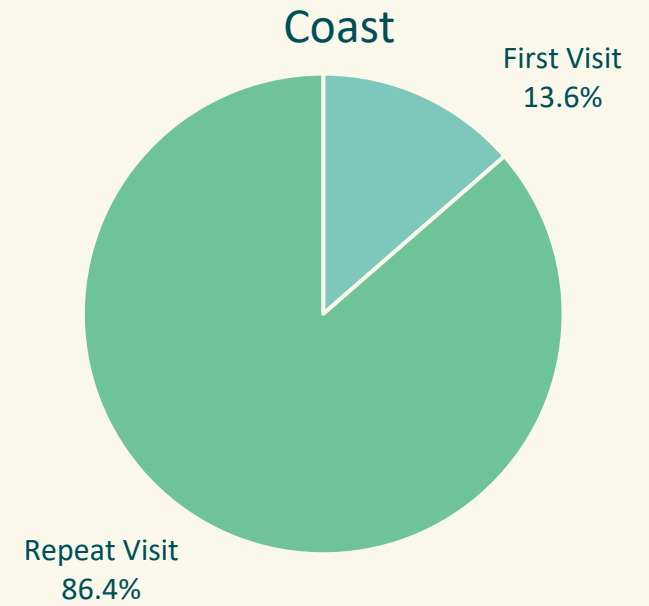
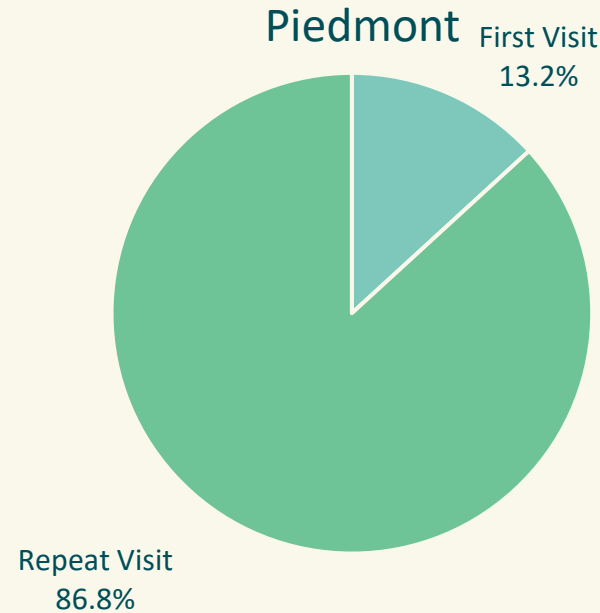
Main Purpose of Visit to Overnight Visitors to North Carolina Regions

- Leisure is by far the top primary purpose of visit for each region of the state.
- 55 percent of business travelers to the Mountain Region say that they extended their business trip for leisure in 2021, while 38% of Piedmont visitors and 45% of Coastal visitors extended their stays.



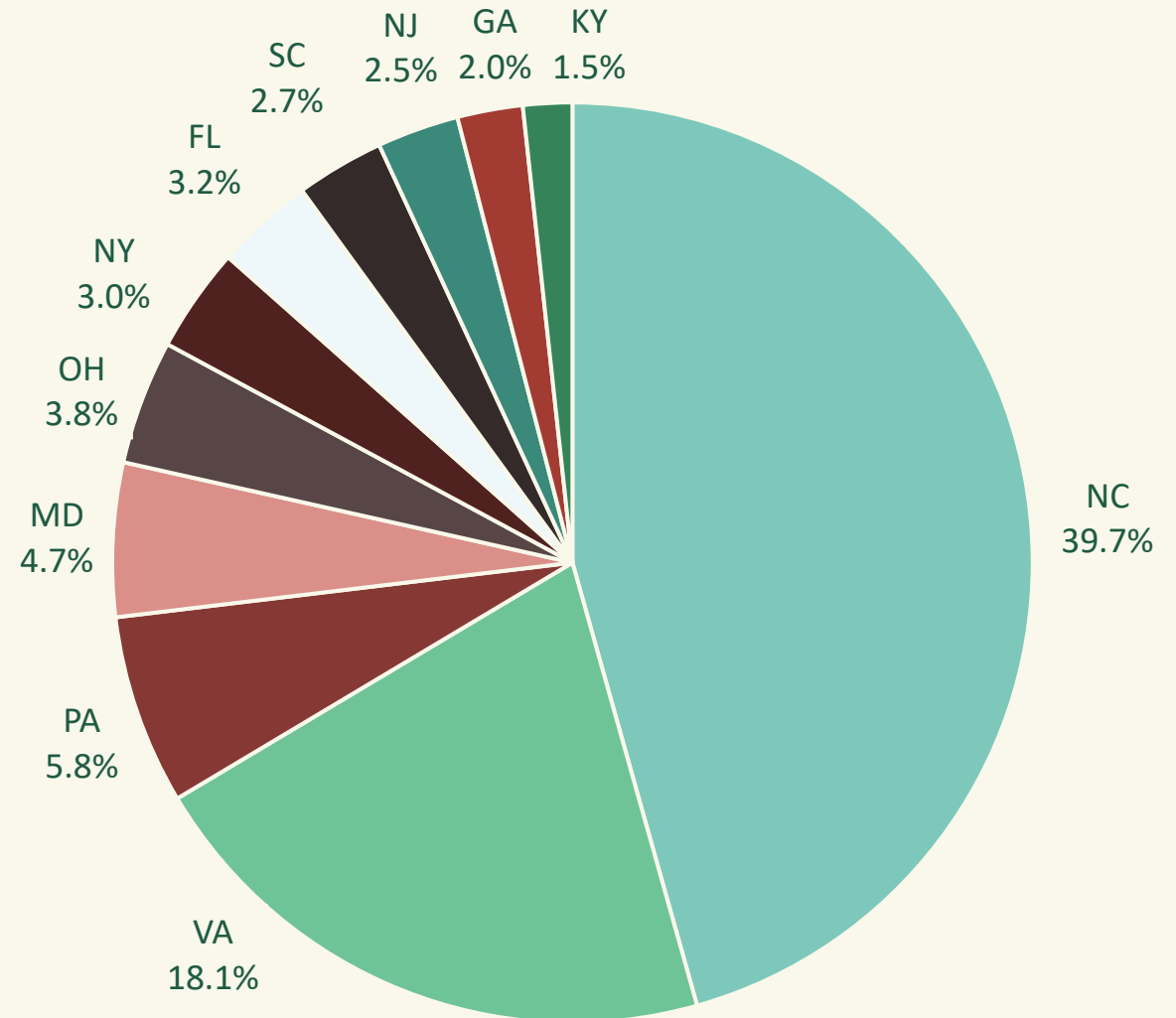
First Visit to North Carolina for Overnight Visitors

- All three regions welcomed similar proportion of first time visitors in 2021, while the majority of visitors are repeat.



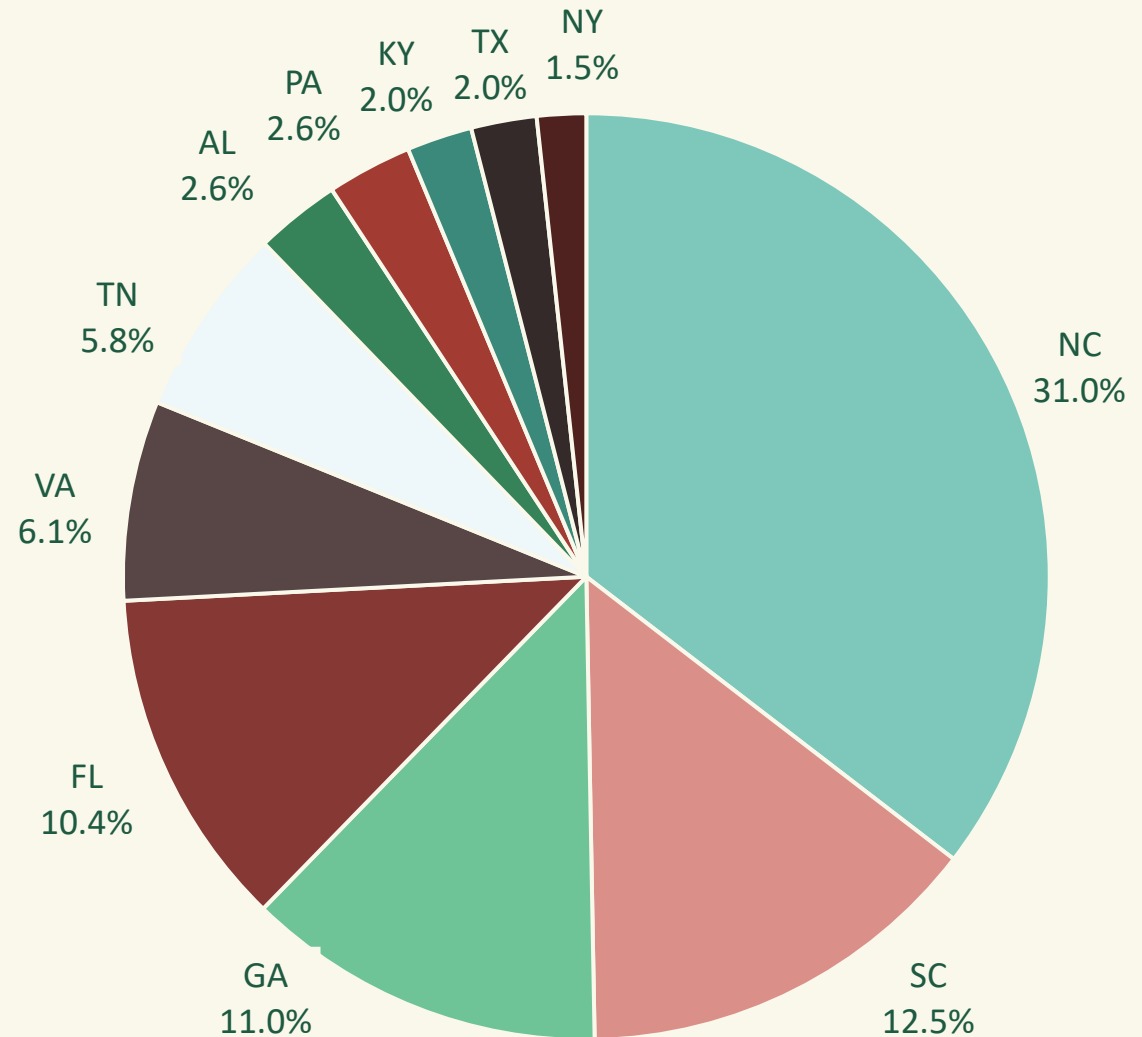
State of Origin of Overnight Visitors to North Carolina — Coastal Region

- 40 percent of overnight visitors to the coast in 2021 were in-state residents.
- The next ten states represented 47 percent of overnight visitors to the Coastal Region.



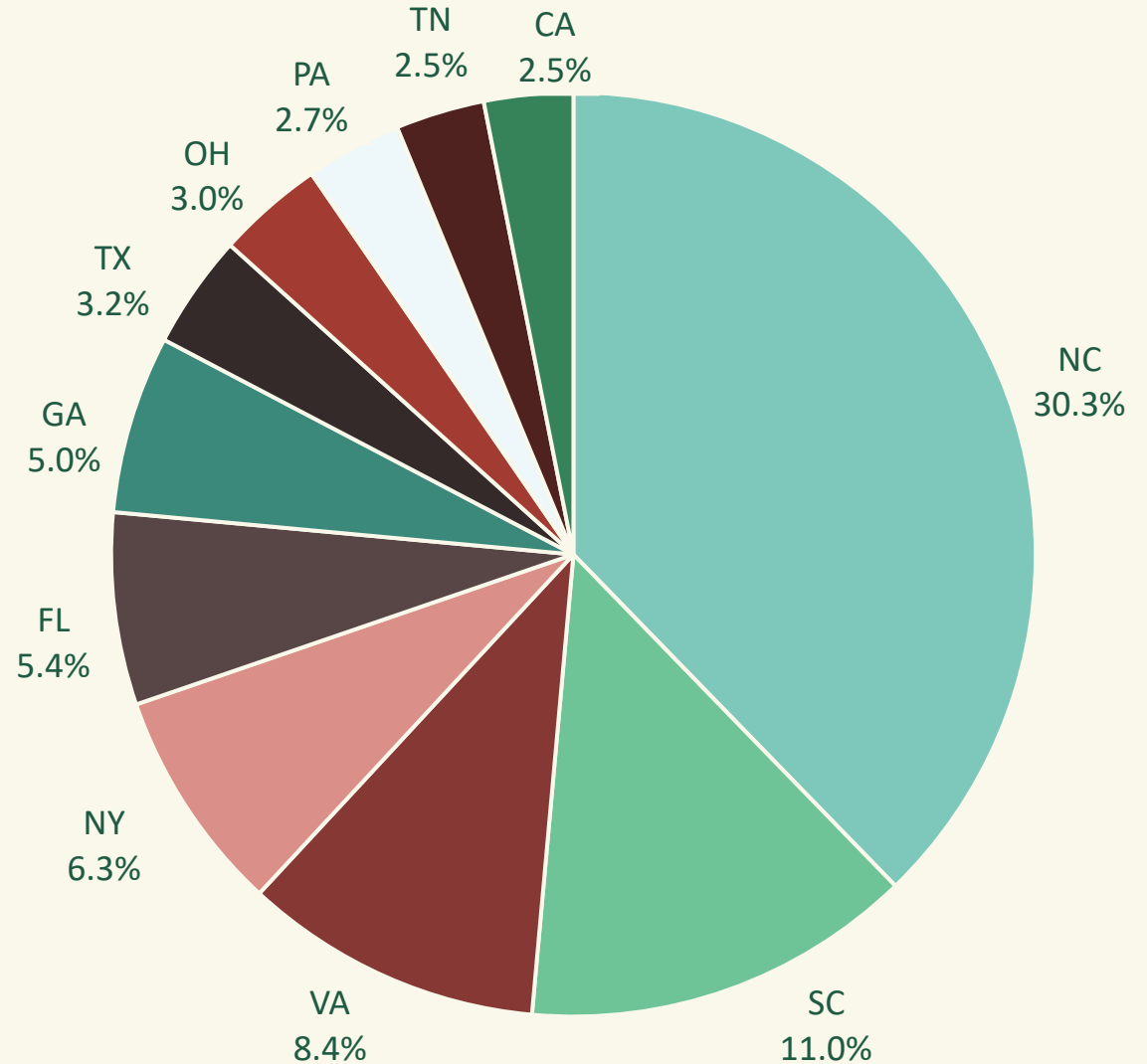
State of Origin of Overnight Visitors to North Carolina — Mountain Region

- 31 percent of overnight visitors to the mountains in 2021 were in-state residents.
- The next ten states represented 57 percent of visitors to the Mountain Region.



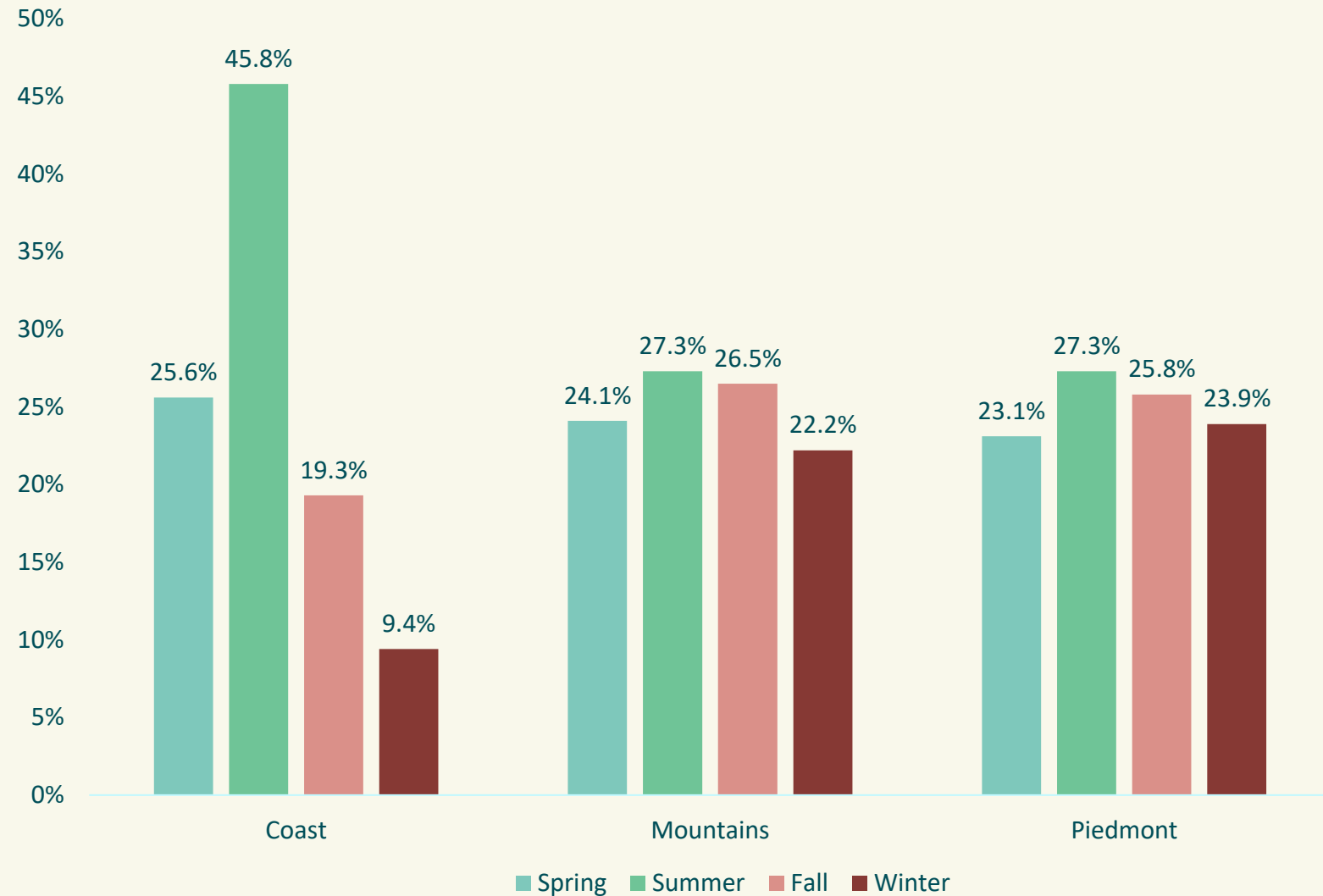
State of Origin of Overnight Visitors to North Carolina — Piedmont Region

- Just over 30 percent of overnight visitors to the piedmont in 2021 were in-state residents.
- The next ten states represented 50 percent of visitors to the Piedmont Region.



Season of Visit

- The summer season was the most popular for overnight visitors to the coast and mountains in 2021.
- The Piedmont Region saw a slightly larger proportion of visitors during the summer and fall last year.



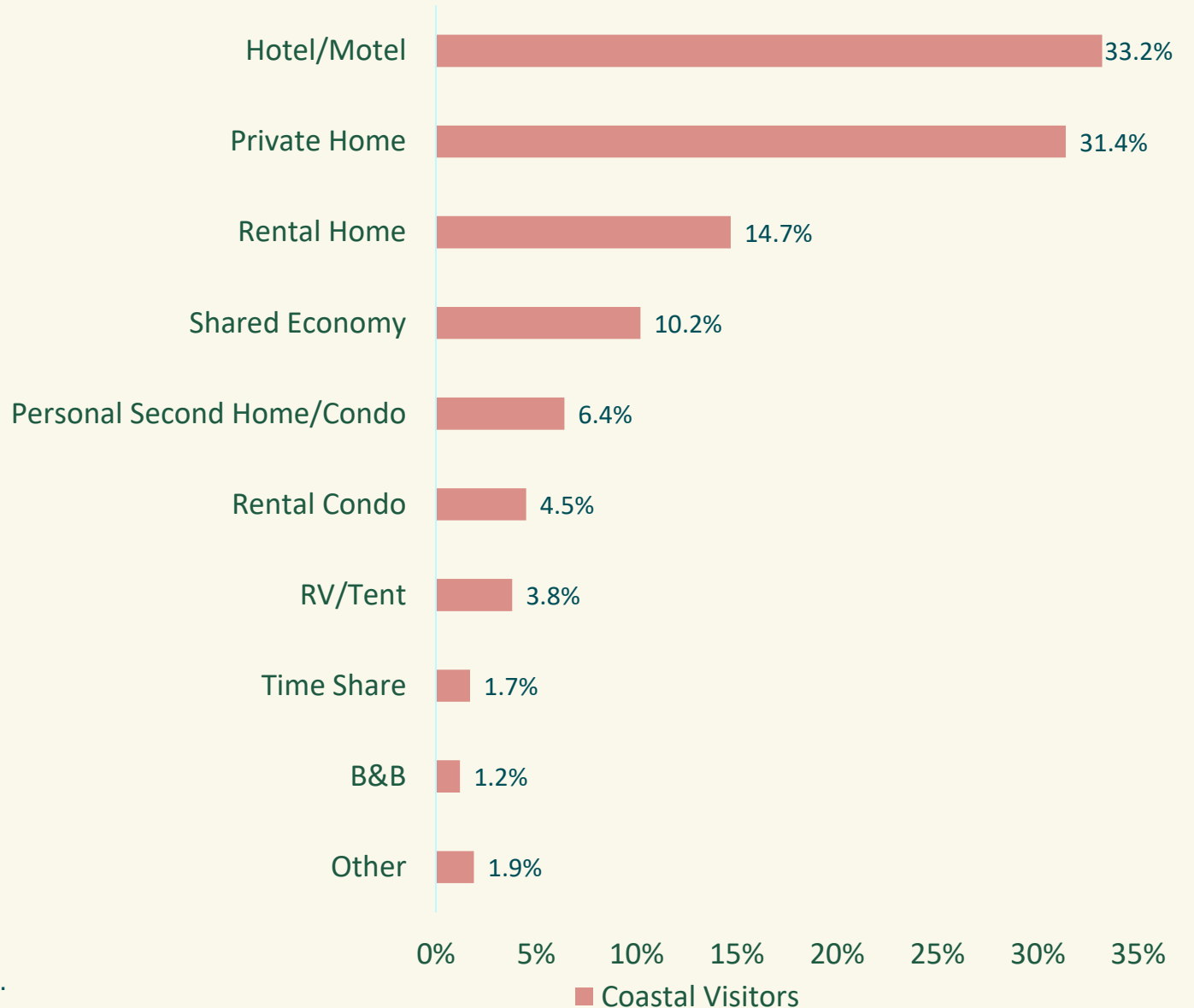
Average Length of Stay for NC Overnight Visitors

- Coastal Region– 4.4 nights
- Mountain Region – 3.3 nights
- Piedmont Region – 3.4 nights



Accommodations Used in Coastal Region

- Coastal Region visitors were more likely to use hotels/motels while in the state, followed closely by private homes and rental homes.
- Ten percent of overnight visitors to the coast reported a stay in a shared economy property, similar to 2020.

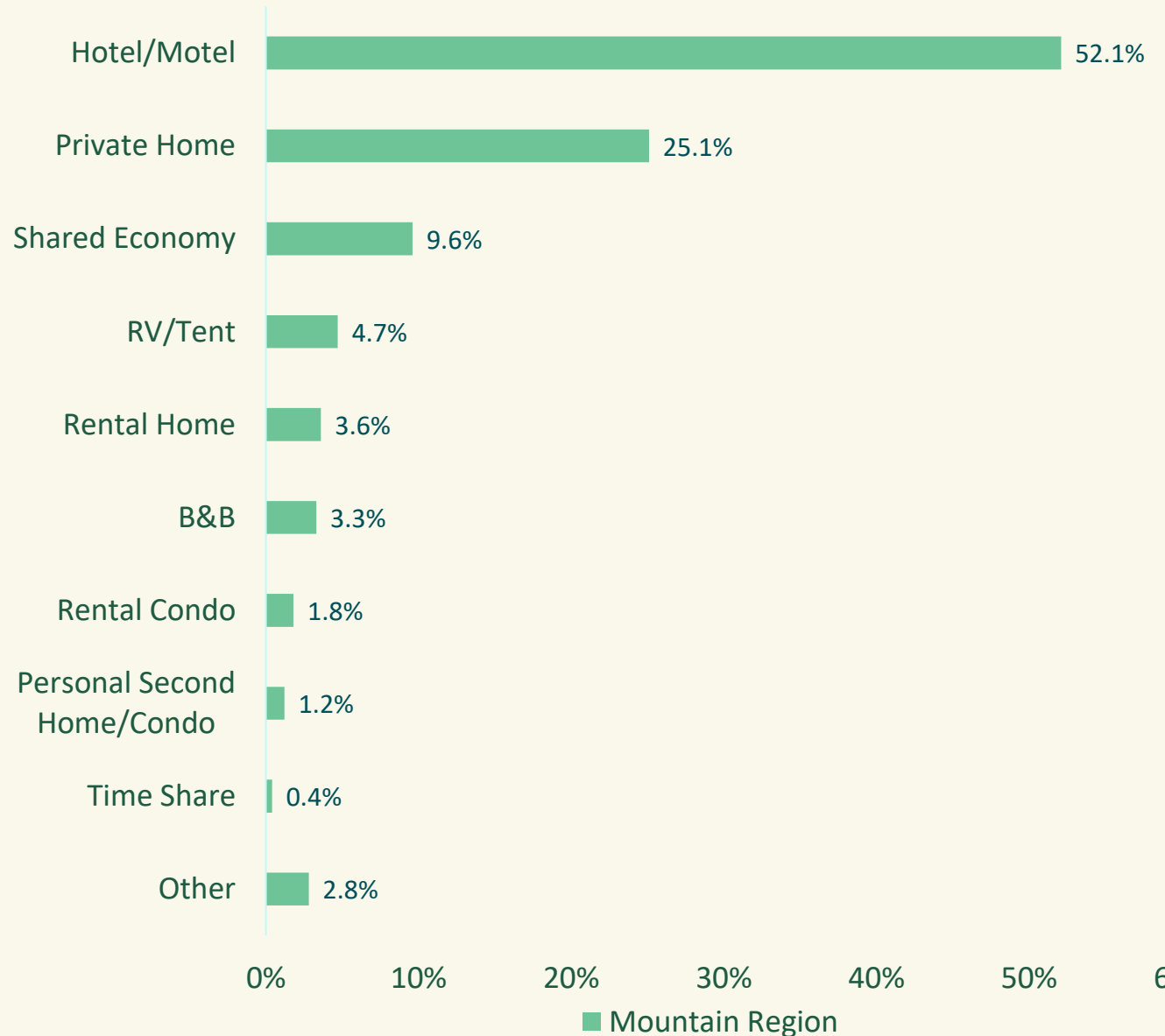


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Accommodations Used in Mountain Region

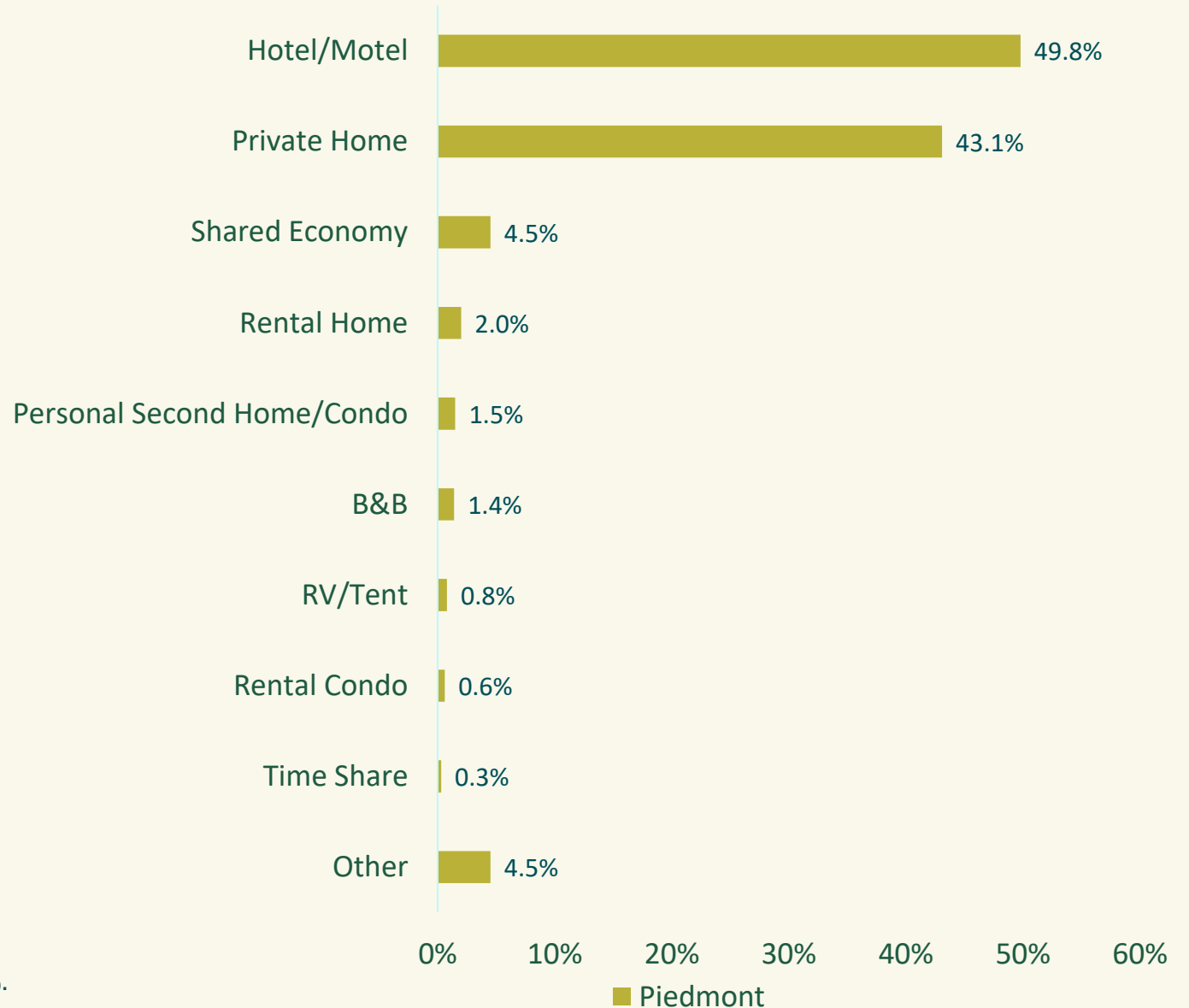
- Mountain Region visitors were more likely to use hotels/motels while in the state, followed closely by private homes.
- Nearly ten percent of overnight visitors to the mountains reported a stay in a shared economy property.



*multiple responses allowed; thus, percentages do not add to 100%.

Accommodations Used in Piedmont Region

- Piedmont Region visitors were more likely to use hotels/motels while in the state, followed by private homes.
- More than four percent of overnight visitors to the piedmont reported a stay in a shared economy property.

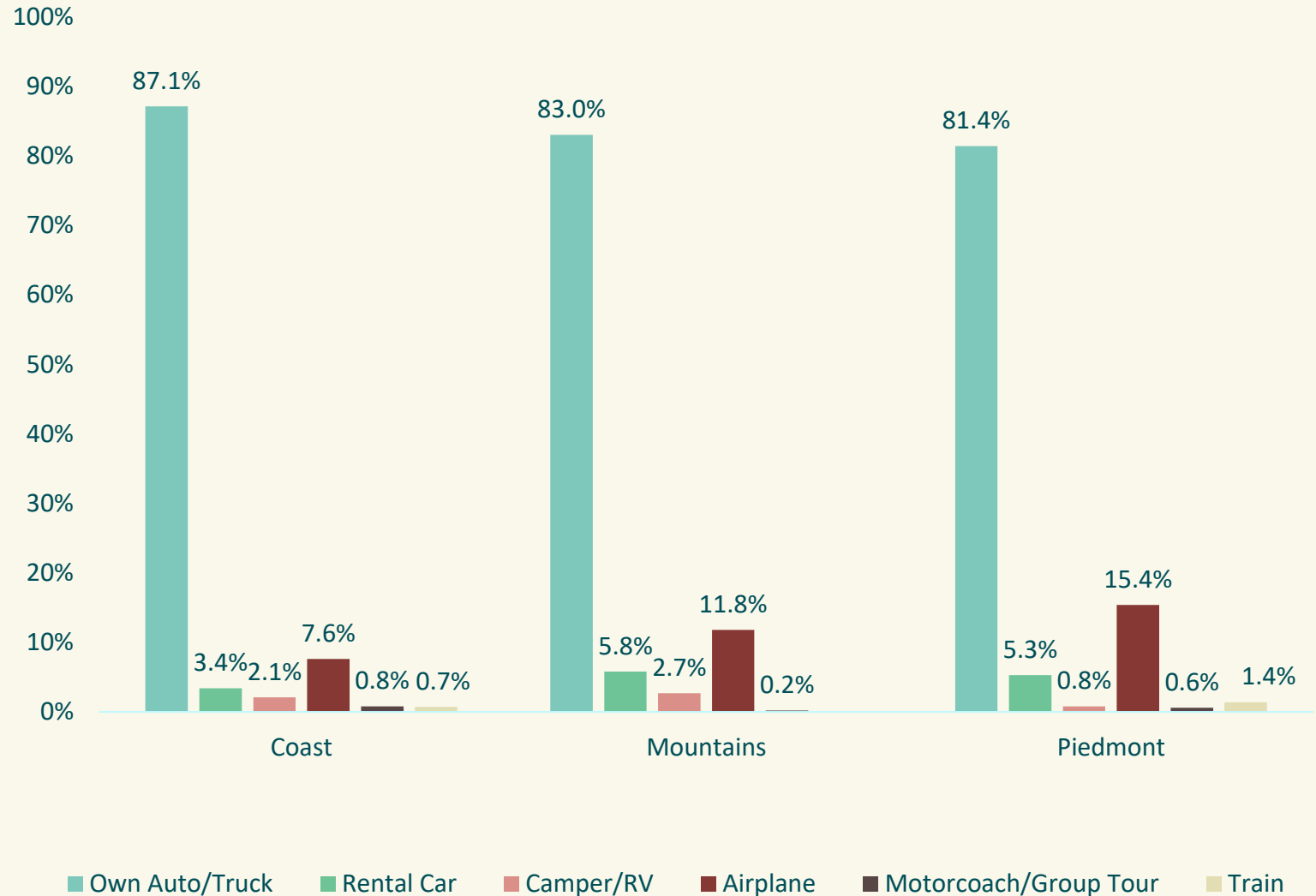


*multiple responses allowed; thus, percentages do not add to 100%.



Transportation Used to Travel to North Carolina

- Not surprisingly, overnight travelers to each region traveled to the state via automobile, primarily personal.
- Airplane travel was the second most popular mode of transportation for travel to North Carolina in 2021.

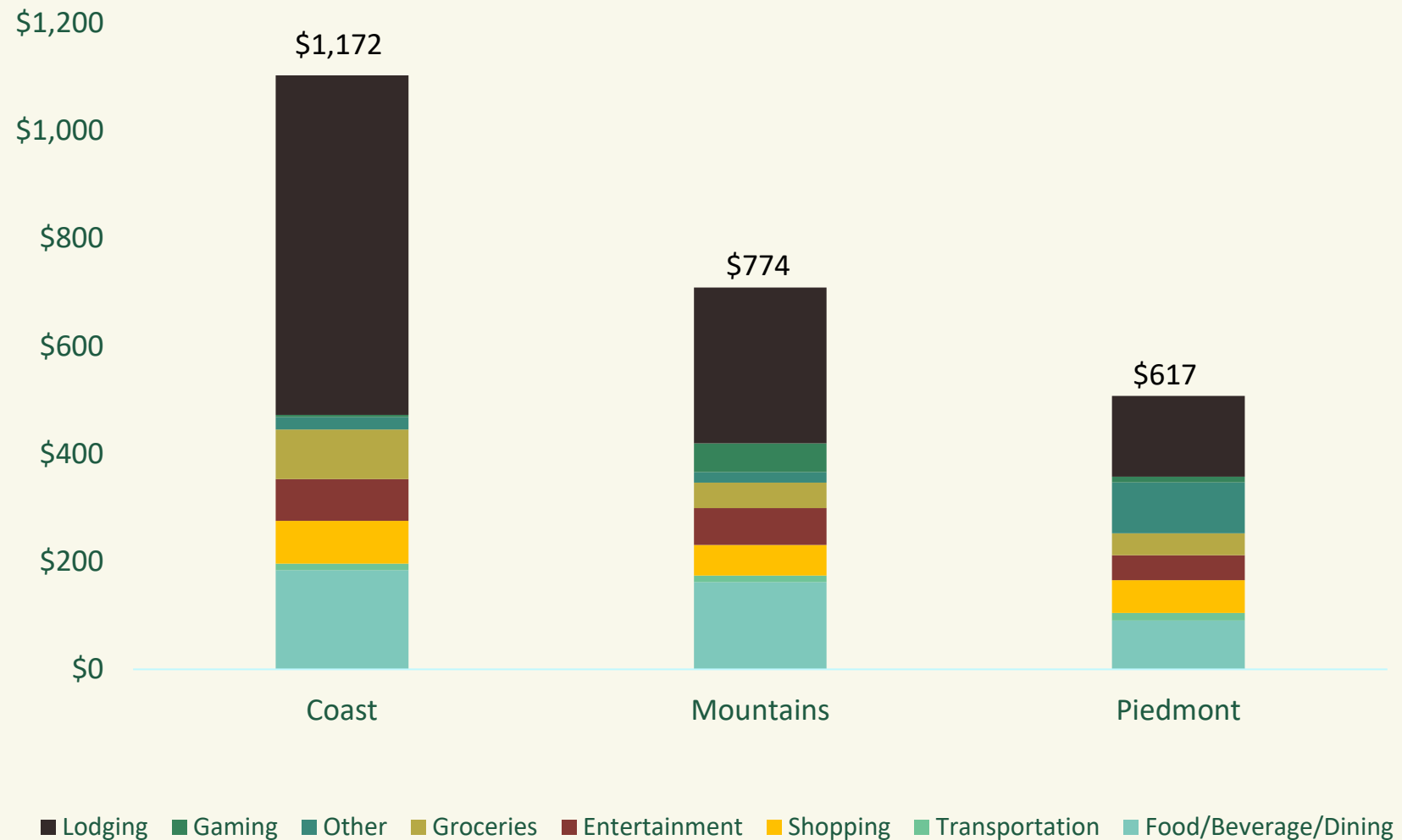


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Average Trip Spending for Overnight NC Visitor Parties by Region

- Overnight visitors to the coast spent more per trip in 2021 than visitors to other regions
- However, the length of stay for coastal visitors is also longer.



Top Activities Participated in by Overnight Regional Visitors in 2021

Coastal Visitors		Mountain Visitors		Piedmont Visitors	
Beach	66.4%	Hiking/Backpacking/Canyoneering	22.7%	Visiting friends/relatives	42.6%
Shopping	35.8%	Visiting friends/relatives	25.6%	Shopping	21.9%
Visiting friends/relatives	30.4%	Rural sightseeing	26.7%	Historic sites	11.2%
Fishing	17.5%	Shopping	21.5%	Museums	6.6%
Historic sites	24.1%	Historic sites	28.8%	National park/Monuments/Recreation areas	5.1%
Fine dining	15.0%	Wildlife viewing	14.7%	Rural sightseeing	10.7%
Rural sightseeing	12.0%	National park/Monuments/Recreation areas	14.3%	Urban sightseeing	9.4%
Wildlife viewing	11.2%	State park/Monuments/Recreation areas	17.2%	Fine dining	14.9%
National park/Monuments/Recreation areas	7.1%	Nature travel/Ecotouring	10.4%	State park/Monuments/Recreation areas	5.1%
Golf	5.8%	Fishing	5.2%	Wildlife viewing	4.9%
Hiking/Backpacking/Canyoneering	7.3%	Craft breweries	12.2%	Fishing	4.4%
Biking/Road biking/Cycling	3.8%	Other nature (photography, rockhound, etc)	9.2%	Gardens	6.1%
Gardens	4.1%	Fine dining	15.1%	Hiking/Backpacking/Canyoneering	7.0%
State park/Monuments/Recreation areas	8.3%	Gardens	11.7%	Art Galleries	4.6%
Museums	9.6%	Urban sightseeing	10.5%	Zoos/Aquariums/Aviaries	3.5%
Nature travel/Ecotouring	3.5%	Local/folk arts/crafts	14.7%	Other nature (photography, rockhound, etc)	3.4%
Other nature (photography, rockhound, etc)	3.1%	Art Galleries	7.0%	Nature travel/Ecotouring	4.3%
Scuba diving/Snorkeling	2.1%	Casino/Gaming	12.3%	Theater/Drama	1.1%
Theme park/Amusement park/Water park	2.2%	Museums	13.5%	Theme park/Amusement park/Water park	3.1%
Local/folk arts/crafts	10.6%	Rock/Mountain climbing	4.2%	Craft breweries	6.9%

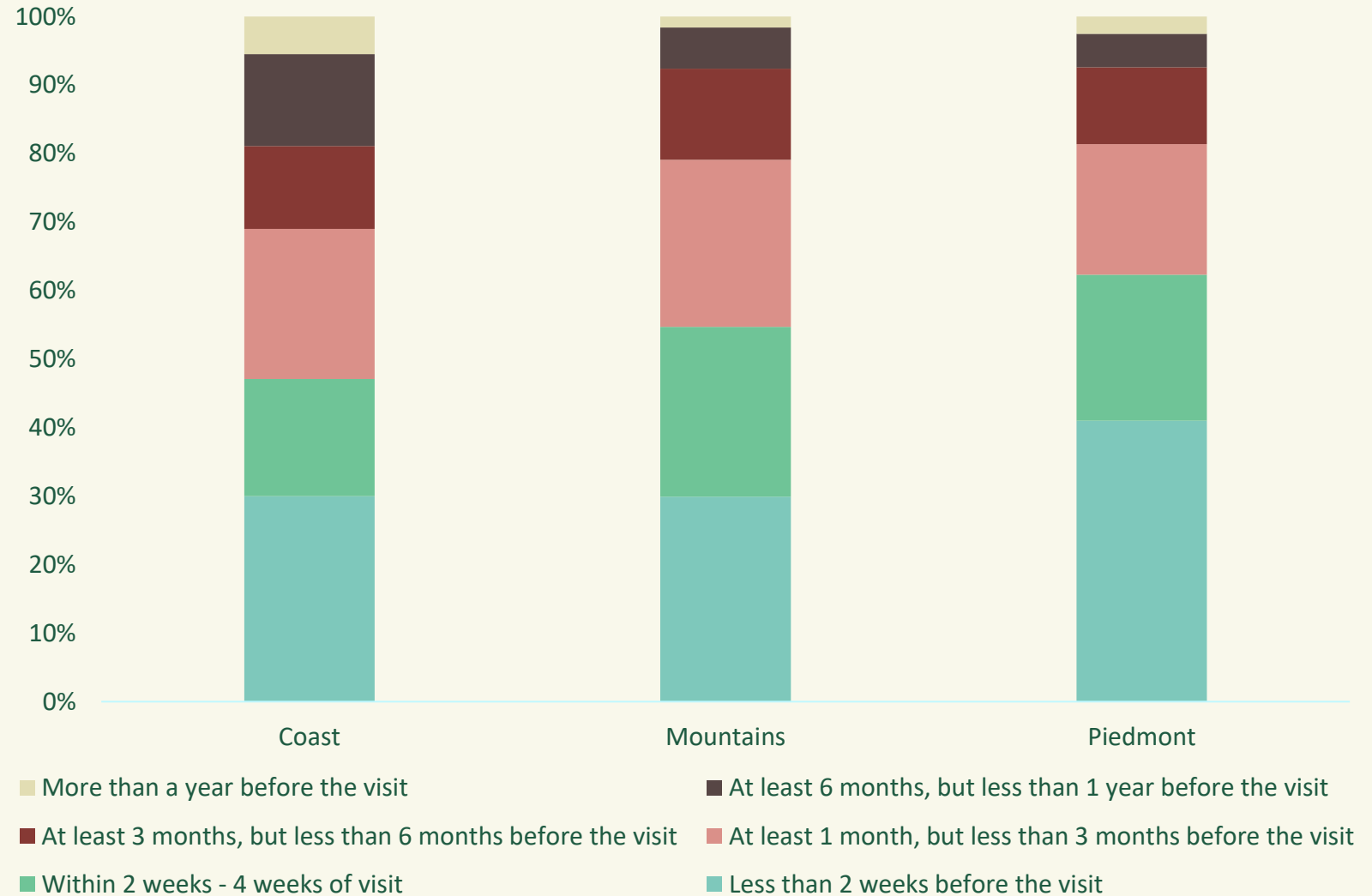
Satisfaction with Visit to North Carolina Regions

- All visitors to and within NC regions reported high satisfactions rates with their visits in 2021.



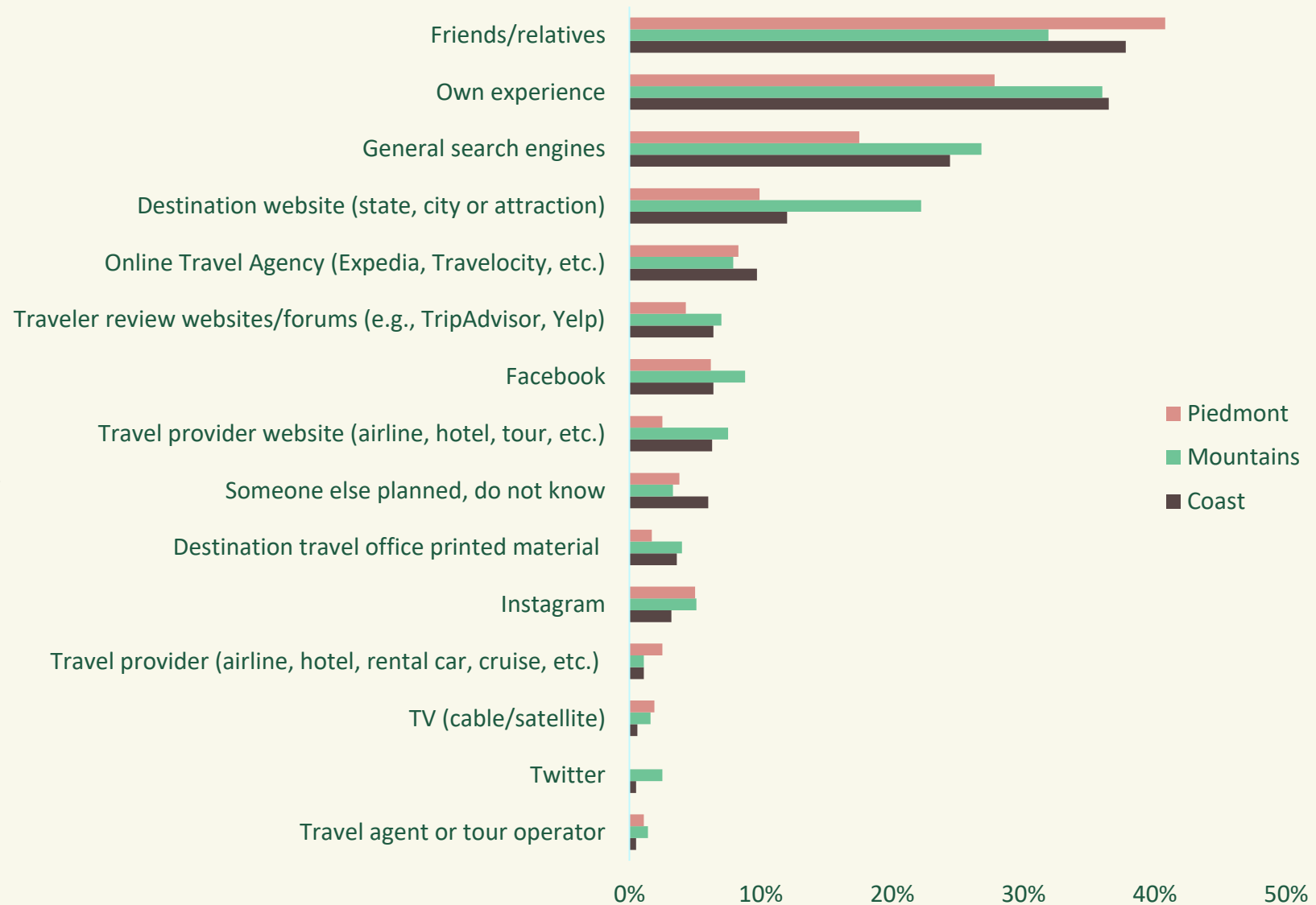
Advance Decision for Overnight Visit to North Carolina by Region

- Coastal Region visitors also made the decision to visit farther in advance than other regional visitors.
- Nearly one-third of coastal visitors decided to visit NC three months or more before the visit.



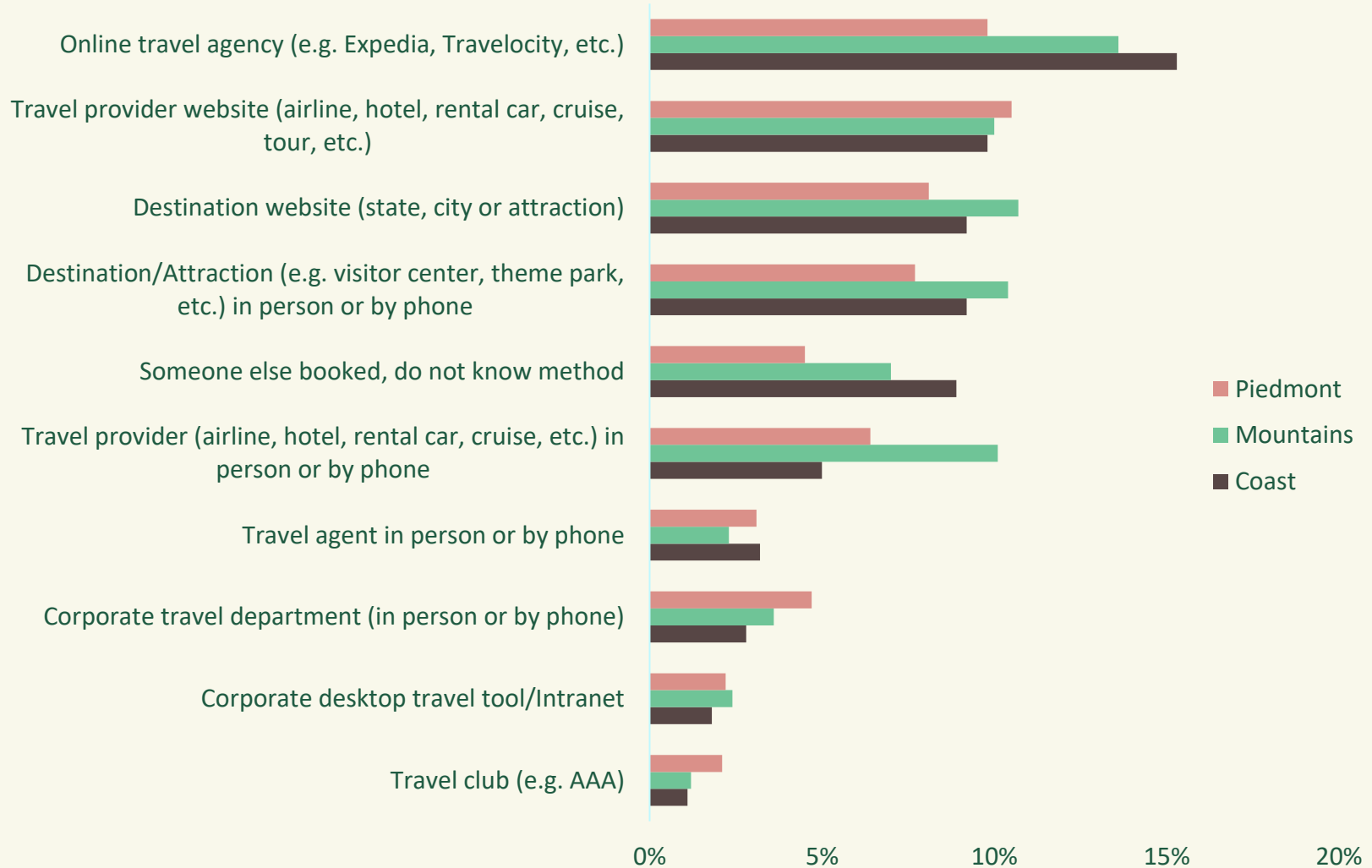
Planning Sources for Overnight Travel to North Carolina Regions

- Visitors to the Mountain Region are more likely to use destination websites and general search engines to plan travel to NC than visitors to other regions.
- Coastal Region visitors are more likely to rely on past experience, while Piedmont Region visitors rely on friends/relatives for planning sources.



Booking Sources for Overnight Travel to North Carolina Regions

- Visitors to the Coastal Region are more likely to book travel to NC via an online travel agency than other regional visitors.
- Mountain Region visitors are more likely to book directly with the travel provider than other regions.
- Piedmont Region visitors rely on both online travel agencies and travel provider websites to book their NC travel.



Top Advertising Markets

- Not surprisingly, in-state markets and those close by were the top DMAs of origin in 2021 for NC regions.
- VA and mid-Atlantic markets ranked high for the coast, while GA, FL and TN ranked high for the mountains. NY ranked 3rd for the piedmont.

Coast DMA of Origin		Mountains DMA of Origin		Piedmont DMA of Origin	
Raleigh-Durham (Fayetteville)	14.9%	Raleigh-Durham (Fayetteville)	9.5%	Raleigh-Durham (Fayetteville)	9.9%
Greensboro-High Point-Winston-Salem	11.3%	Atlanta	9.5%	Charlotte	5.7%
Norfolk-Portsmouth-Newport News	5.7%	Charlotte	12.1%	New York	4.4%
Washington DC (Hagerstown)	5.2%	Greenville-Spartanburg-Asheville-Anderson	6.3%	Greenville-New Bern-Washington	4.1%
Charlotte	5.2%	Greensboro-High Point-Winston-Salem	6.1%	Greensboro-High Point-Winston-Salem	4.8%
Richmond-Petersburg	4.8%	Tampa-Saint Petersburg (Sarasota)	3.3%	Wilmington	4.0%
Philadelphia	3.7%	Tri-Cities, TN-VA	2.0%	Florence-Myrtle Beach	2.6%
Wilmington	2.7%	Knoxville	3.1%	Washington DC (Hagerstown)	2.5%
New York	3.6%	Wilmington	2.0%	Greenville-Spartanburg-Asheville-Anderson	3.8%
Greenville-New Bern-Washington	3.1%	Orlando-Daytona Beach-Melbourne	2.6%	Atlanta	3.9%
Roanoke-Lynchburg	2.7%	Miami-Fort Lauderdale	2.2%	Los Angeles	1.9%
Baltimore	2.3%	Charleston, SC	2.3%	Charleston, SC	2.3%
Pittsburgh	1.7%	Birmingham (Anniston and Tuscaloosa)	1.6%	Orlando-Daytona Beach-Melbourne	1.7%
Atlanta	1.8%	Columbia, SC	1.9%	Columbia, SC	2.8%
Cleveland	2.1%	Roanoke-Lynchburg	1.9%	Knoxville	1.1%
Harrisonburg	1.6%	Columbus, GA	0.8%	Richmond-Petersburg	2.2%
Salisbury	0.8%	Philadelphia	1.1%	Norfolk-Portsmouth-Newport News	3.2%
Hartford & New Haven	1.0%	New York	1.6%	Philadelphia	2.4%
Greenville-Spartanburg-Asheville-Anderson	1.3%	Lexington	0.8%	Tampa-Saint Petersburg (Sarasota)	1.2%
Florence-Myrtle Beach	1.3%	Harrisburg-Lancaster-Lebanon-York	0.8%	Tri-Cities, TN-VA	0.7%

Overnight Travel Party Characteristics

Average Party Size

Coastal visitor parties – 2.9, 39% of parties include children
Mountain visitor parties – 2.6, 31% of parties include children
Piedmont visitor parties – 2.4, 29% of parties include children

Average Age

Coastal visitor – 46 years
Mountain visitor – 47 years
Piedmont visitor – 45 years

Marital Status

Coastal visitor – 69% married
Mountain visitor – 62% married
Piedmont visitor – 59% married

Ethnicity

Coastal visitor parties – 90% white, 4% black, 2% other
Mountain visitor parties – 89% white, 5% black, 2% other
Piedmont visitor parties – 79% white, 13% black, 2% other

Children in Household

Coastal visitor – 38%
Mountain visitor – 30%
Piedmont visitor – 25%

Average Household Income

Coastal visitor – \$87K
Mountain visitor – \$88K
Piedmont visitor – \$81K

Glossary of Terms

Travel - A trip over 50 miles one-way from home *or* 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.