

2014 North Carolina Visitor Profile

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



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2014 North Carolina Visitor Profile

Visit North Carolina, formerly the North Carolina Division of Tourism, Film and Sports Development, has contracted with the research company TNS for data on North Carolina visitors since 2006. TNS is the world's largest provider of custom research and analysis, serving all segments of the travel industry. The company has over 13,000 full-time employees worldwide and offices in more than 80 countries.

The research program, titled "TravelsAmerica" conducts over 10,000 Internet-based interviews among past 12-month travelers who have traveled more than 50 miles from their homes (excluding commuters). From this sample, past-month data from 4,500 – 5,500 past month travelers is also collected for even greater insights. Information collected includes: purpose of trip, mode of travel, travel party characteristics, places visited, number of nights, accommodations, activities, spending, and demographics. Data collected are weighted to match US Census variables, market size, age of household head, household income, and household size. The research staff of Visit North Carolina created the following report based on this data from TravelsAmerica.

The purpose of this 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.

2014 North Carolina Visitor Profile

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2014 North Carolina Visitor Profile

Summary

- ◆ In 2014, approximately 48.2 million person-trips were taken in North Carolina and ranked #6 in the US in terms of domestic visitation.
- ◆ Eighty-one percent of all domestic visitors came to North Carolina for pleasure purposes, while twelve percent of visitors came to conduct business (includes meeting/convention). The remaining seven percent indicated “other” reason for visiting the state. Similarly, in terms of overnight visitors to the state, eighty-one percent of domestic visitors came to North Carolina for pleasure purposes, twelve percent traveled for business purposes and seven percent visited the state for “other” purposes.
- ◆ The summer (June - August) was the most popular season for travel to North Carolina, with thirty-two percent of all 2014 visitors. Fall (September - November) followed with twenty-four percent of the annual visitors. The spring (March-May) and winter (December-February) seasons each welcomed twenty-two percent of visitors in 2014. June was the single largest month for travel to the state with nearly thirteen (12.7%) percent, followed by December (10.5%) and July (10.4%).
- ◆ Nearly forty-eight percent of North Carolina overnight visitors lodged in a hotel/motel, while forty percent stayed in a private home. Nine percent stayed in a rental home or condo, while nearly five percent stayed in a personal second home or condo.
- ◆ The average travel party size for all North Carolina visitor parties was 1.9. Twenty-three percent of travel parties to the state included children in the party.
- ◆ Eighty-seven percent of all travelers to the state drove (includes personal automobile, rental, motorcycle and RV), while eight percent traveled by air.
- ◆ In 2014, the average household trip expenditure by visitors to North Carolina was \$533. The average household trip expenditure for overnight visitors was \$688. Daytrip parties to the state spent approximately \$191 per visit.
- ◆ The top states of origin of *total* visitors to North Carolina were in-state residents (37.0%), South Carolina (9.4%), Virginia (7.6%), Florida (7.4%), Georgia (6.4%), New York (3.7%) and Tennessee (3.4%).
- ◆ Twenty-five percent of the households that traveled to North Carolina in 2014 had a household income over \$100,000. The average household income for all visitors was \$71,000.
- ◆ In 2014, Raleigh/Durham/Fayetteville (15.0%) was the top advertising market of origin for *all* travelers to the state, followed by Charlotte (12.0%), Greensboro/High Point/Winston Salem (9.5%), Atlanta (5.5%), Greenville-Spartanburg-Asheville (5.0%), Greenville-New Bern-Washington (3.7%), Roanoke-Lynchburg (2.8%), New York (2.7%) and Washington, DC (2.3%).

2014 North Carolina Overnight Visitor Profile

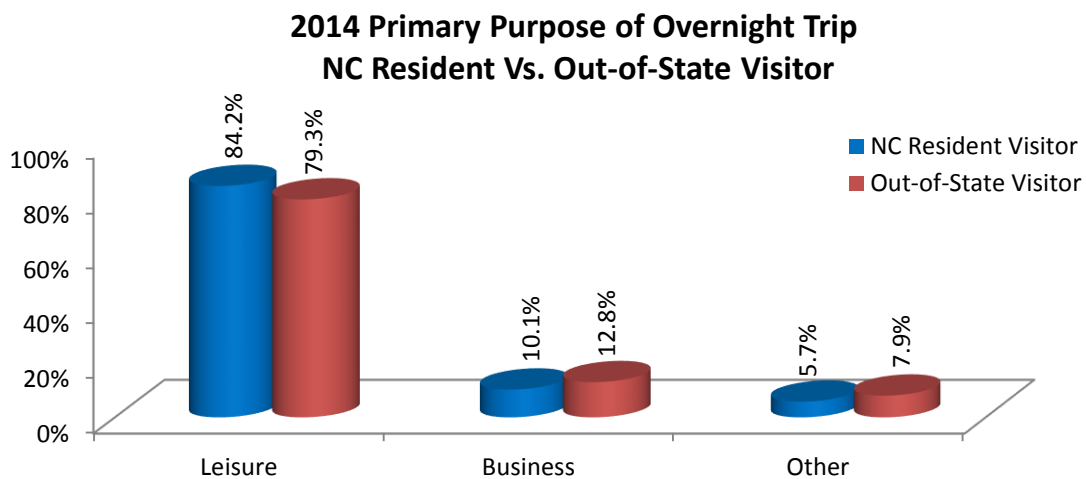
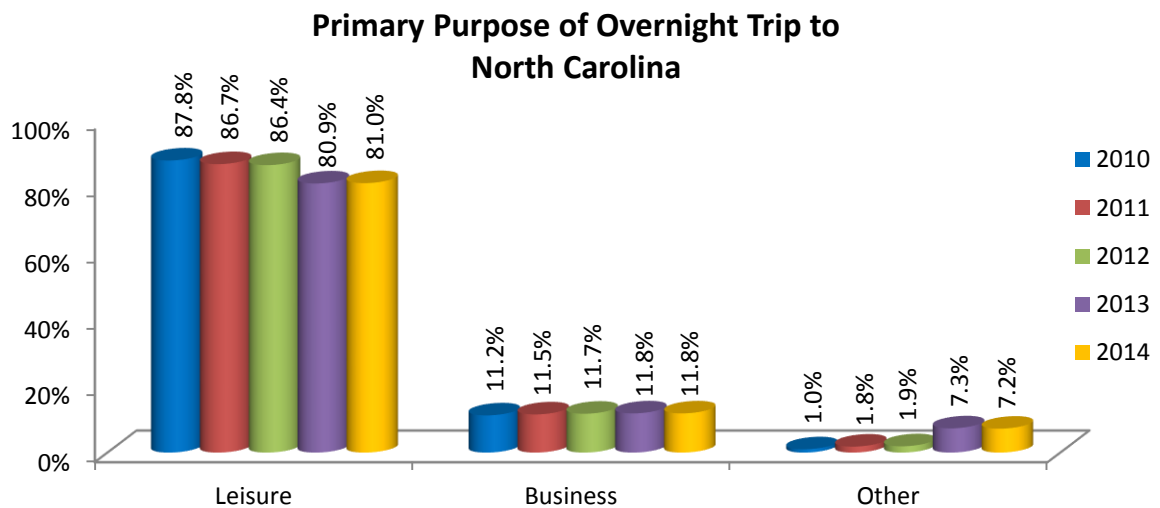
Summary

- ◆ In 2014, approximately 37 million overnight person-trips were taken in North Carolina. North Carolina ranked #6 in the US in terms of domestic overnight visitation.
- ◆ Eighty-one percent of all domestic overnight visitors came to North Carolina for leisure purposes, while twelve percent of visitors came to conduct business (includes meeting/convention). The remaining seven percent indicated “other” reason for visiting the state.
- ◆ The summer (June - August) was the most popular season for overnight travel to North Carolina, with thirty-four percent of all 2014 overnight visitors. Fall (September - November) followed with twenty-four percent of visitors. The winter (December-February) and spring (March-May) seasons saw twenty-one percent of annual visitors each. June was the single largest month for overnight travel to the state with nearly thirteen percent, followed by July (11.3%) and December (10.9%).
- ◆ Overnight visitors to North Carolina spent an average of 2.8 nights in the state in 2014. This was an increase from 2.7 nights in 2013.
- ◆ Forty-eight percent of North Carolina overnight visitors lodged in a hotel/motel, while forty percent stayed in a private home. Nine percent stayed in a rental home or condo, while nearly five percent stayed in a personal second home or condo.
- ◆ The average travel party size for all overnight North Carolina visitor parties was 1.9 people. Twenty-three percent of overnight travel parties to the state included children in the party.
- ◆ Eighty-five percent of overnight travelers to the state drove (includes personal automobile, rental, motorcycle and RV), while ten percent traveled by air.
- ◆ In 2014, the average household trip expenditure for overnight visitors was \$688. Resident overnight visitors spent an average of \$557 and out-of-state overnight visitors spent an average of \$745.
- ◆ The top states of origin of *overnight* visitors to North Carolina were in-state residents (30.0%), South Carolina (9.2%), Florida (8.1%), Virginia (7.9%), Georgia (7.3%), New York (4.3%) and Tennessee (3.1%).
- ◆ Forty percent of the households that traveled overnight to North Carolina in 2014 had a household income over \$75,000, and more than a quarter (28%) of them had an income of over \$100,000. The average annual income of overnight visitors to the state was \$74,000.
- ◆ In 2014, Raleigh/Durham/Fayetteville (12.5%) was the top advertising market of origin for *overnight* travelers to the state, followed by Charlotte (9.7%), Greensboro/High Point/Winston Salem (7.7%), Atlanta (6.3%), Greenville-Spartanburg-Asheville (3.9%), New York (3.4%), Washington, DC (2.9%) and Norfolk-Portsmouth-Newport News (2.5%).

North Carolina Overnight Visitor Profile

Main Purpose of Visit

In 2014, eight out of ten (81.0%) of domestic overnight visitors came to North Carolina for leisure purposes, which included visiting friends and relatives, outdoor recreation and entertainment/sightseeing. Nearly twelve percent (11.8%) of overnight visitors came for general business, convention, seminar or other group meeting, while seven percent traveled to the state to conduct personal or “other” business. Purpose of trip for overnight visitors to the state changed little from 2013, as North Carolina continues to be primarily visited by leisure travelers.

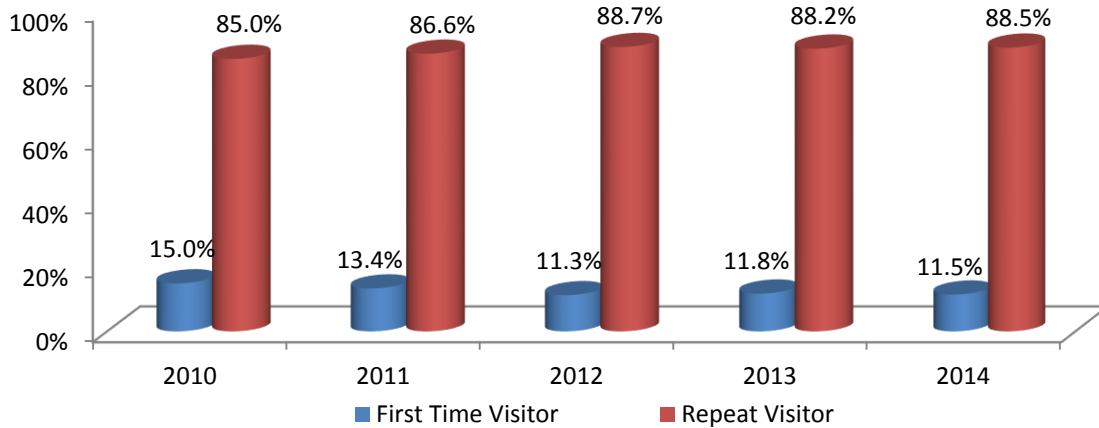


Resident travelers are slightly more likely to be leisure visitors than out-of-state overnight visitors to North Carolina. Eighty-four percent of NC residents traveling overnight in North Carolina in 2014 were leisure visitors while seventy-nine percent of out-of-state visitors were leisure visitors. Nearly thirteen percent of out-of-state visitors in 2014 indicated that their primary purpose of visit was business.

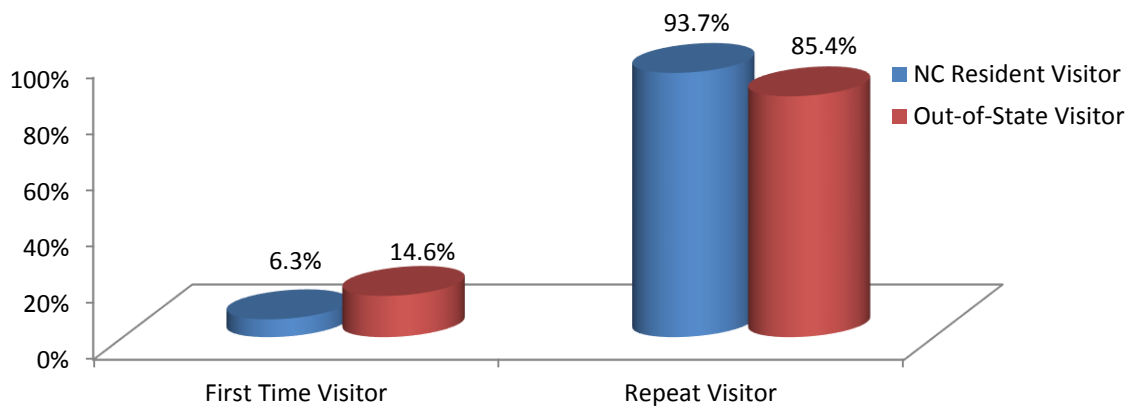
First Time Visitors

In 2014, nearly twelve percent of overnight visitors were first time visitors to the state. More than two-thirds have visited more than three times in the last 5 years. The proportion of first time to repeat overnight visitors to North Carolina has remained consistent over the last several years.

2014 First Time Overnight Visitors to North Carolina



**2014 First Time Overnight Visitors to North Carolina
NC Resident Vs. Out-of-State Visitor**

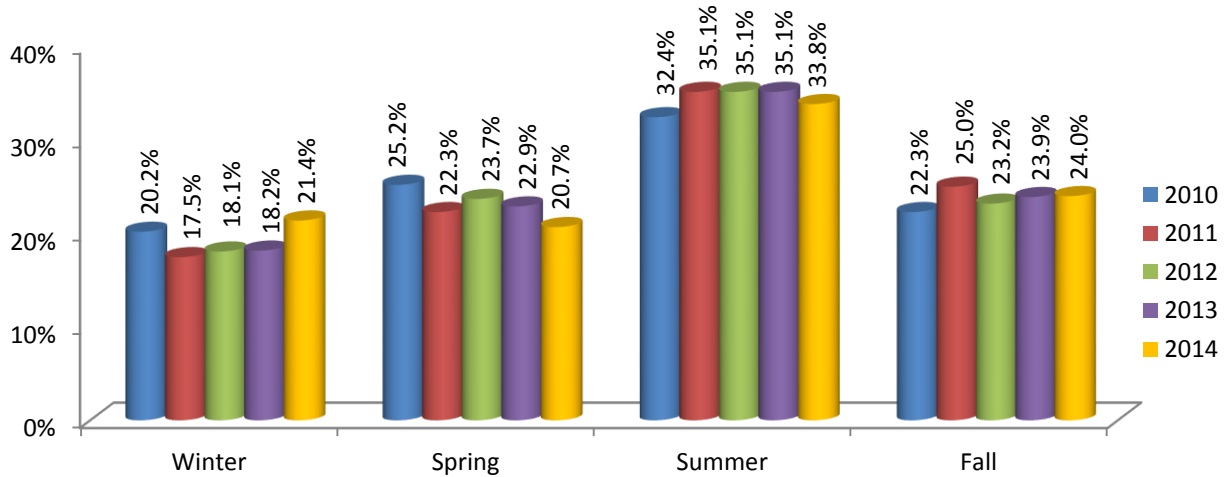


Not surprisingly, out-of-state travelers to North Carolina are more likely to be first time visitors to the state, however six percent of resident travelers indicated that their 2014 overnight visit within the state was their first visit. This is likely attributed to new residents to North Carolina, as the population continues to grow.

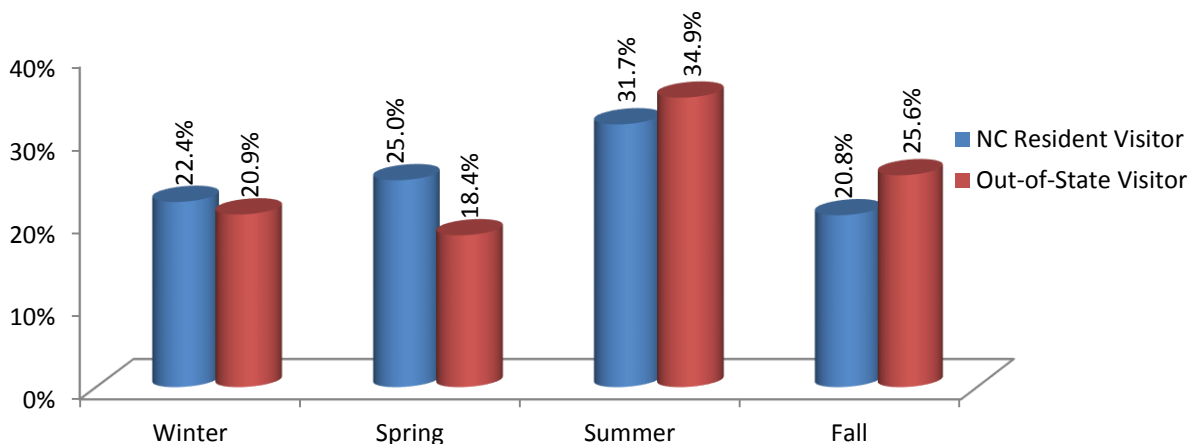
Travel Volume by Season

When examining overnight visitation based on the typical seasonal schedule, the summer (June through August) with thirty-four percent was the most popular season of the year for overnight travel to North Carolina. Fall (September through November) was the next most popular travel season (24%) for overnighters, followed by winter (December through February) with twenty-one percent and spring (March through May) with nearly twenty-one percent of overnight visitors. The winter proportion of total overnight visitors increased from eighteen percent in 2013 to more than twenty-one percent in 2014, while the spring travel proportion showed a decrease. Winter travel to and within the state has shown a steady increase over the last several years.

Overnight Travel by Season to North Carolina



**Overnight Travel by Season to North Carolina
NC Resident Vs. Out-of-State Visitor**

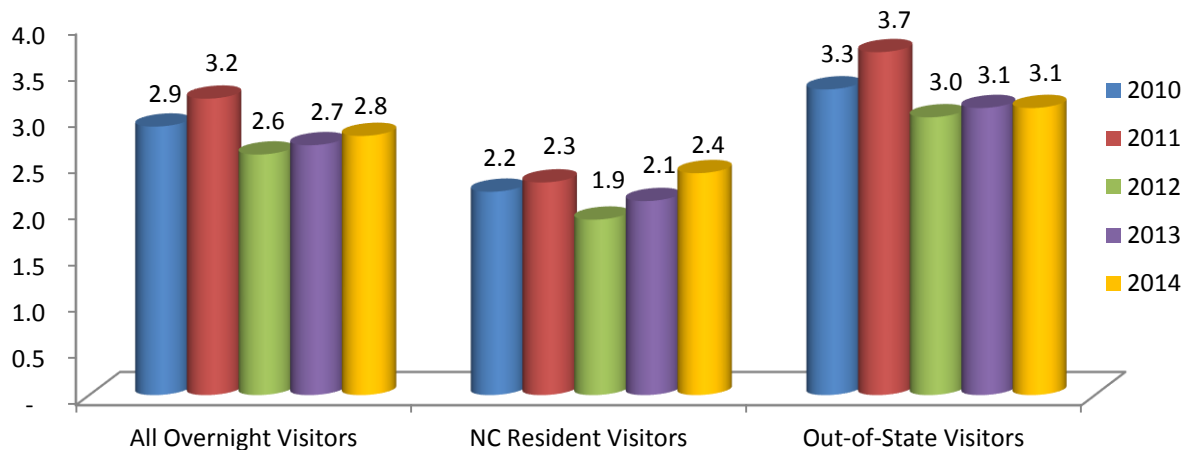


While the majority of both North Carolina resident and out-of-state visitors travel during the summer, spring is the next most popular season for resident overnight travel. Out-of-state visitors are more likely to travel in the fall and winter than in the spring.

Average Length of Stay

After a significant drop in 2012, average trip length is slowly growing. Length of stay by overnight visitors in North Carolina is on the rise, particularly for resident visitors.

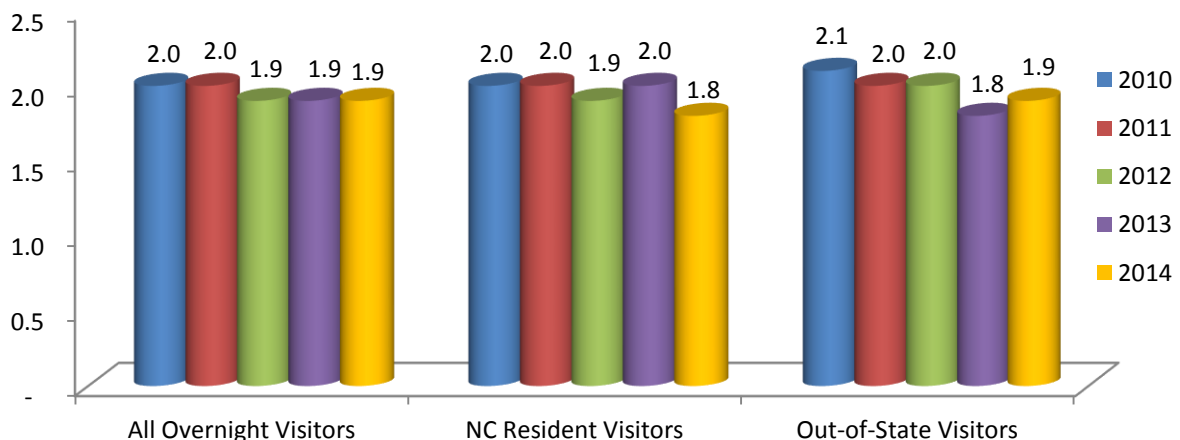
Average Length of Stay for Overnight Visitors to North Carolina



Travel Party Size

The average travel party size for all North Carolina overnight visitor parties has remained consistent over the last several year at 1.9 persons. Out-of-state visitor parties were slightly larger in 2014 than resident visitor parties.

Average Party Size for Overnight Visitors to North Carolina

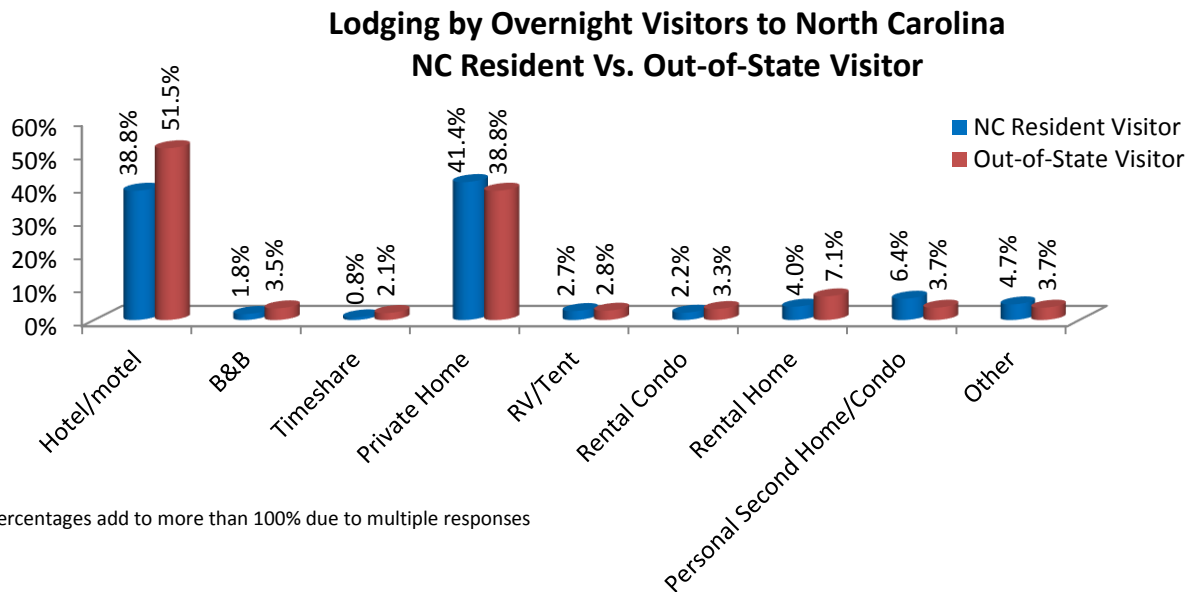
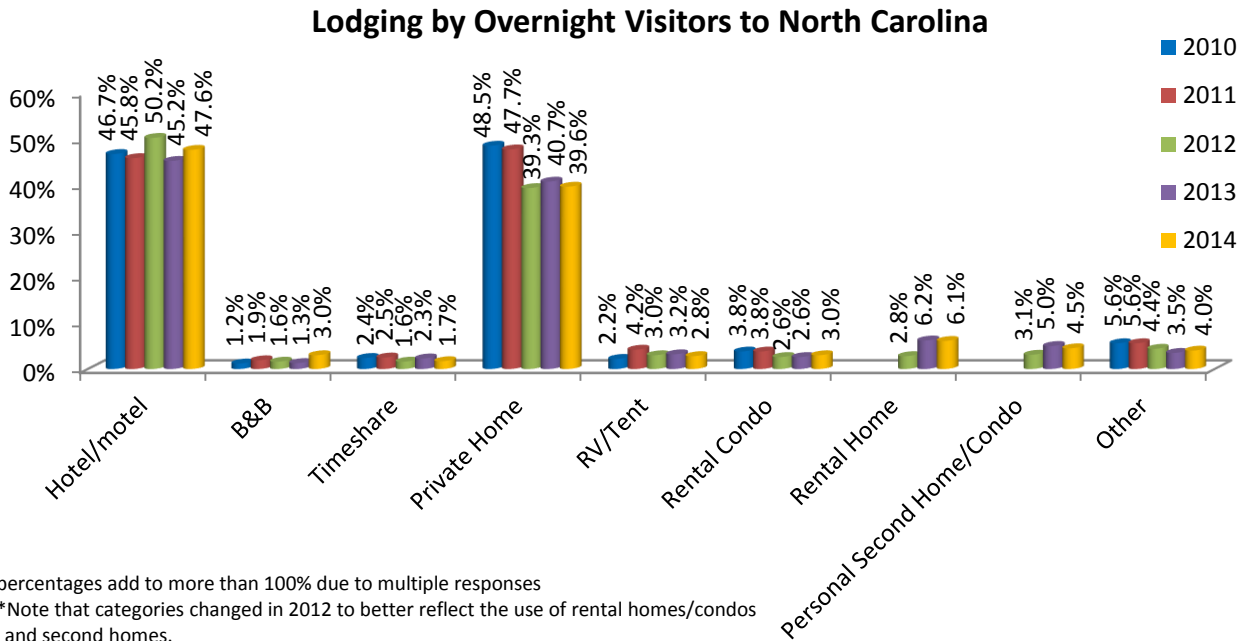


Children on Trip

Twenty-three percent of all overnight visitor parties to North Carolina included children. Among those who traveled with children, the average number of children on trips was 1.9. Out-of-state visitor parties are slightly more likely to include children than resident visitor parties (24% vs. 21%).

Lodging Used in North Carolina

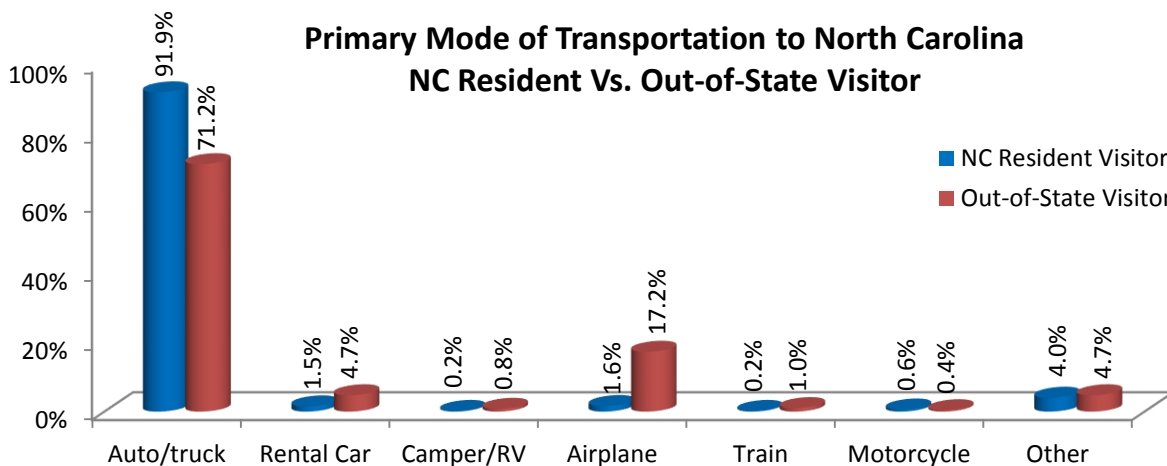
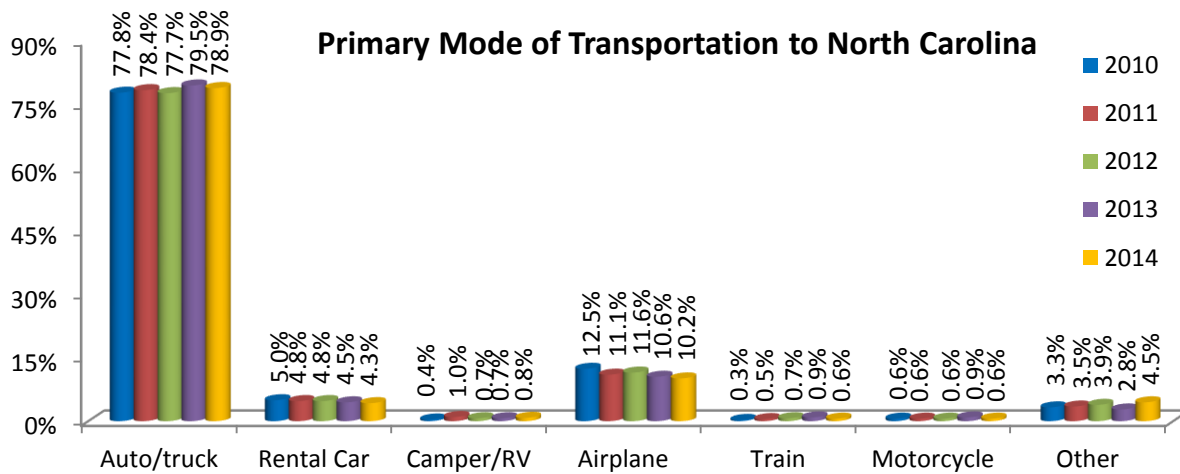
In 2014, nearly forty-eight percent of North Carolina visitors lodged in a hotel/motel, up from forty-five percent in 2013. Forty percent stayed in a private home. Note that in 2012 the lodging categories changed to better reflect the use of rental homes/condos and personal second homes/condos. Nine percent of overnight visitors in 2014 stayed in a rental condo or rental home while in North Carolina.



Out-of-state visitors are more likely to use a hotel/motel and rental homes as accommodations than resident visitors. Resident visitors are more likely to stay in a personal second home/condo or other private home than out-of-state visitors.

Mode of Transportation

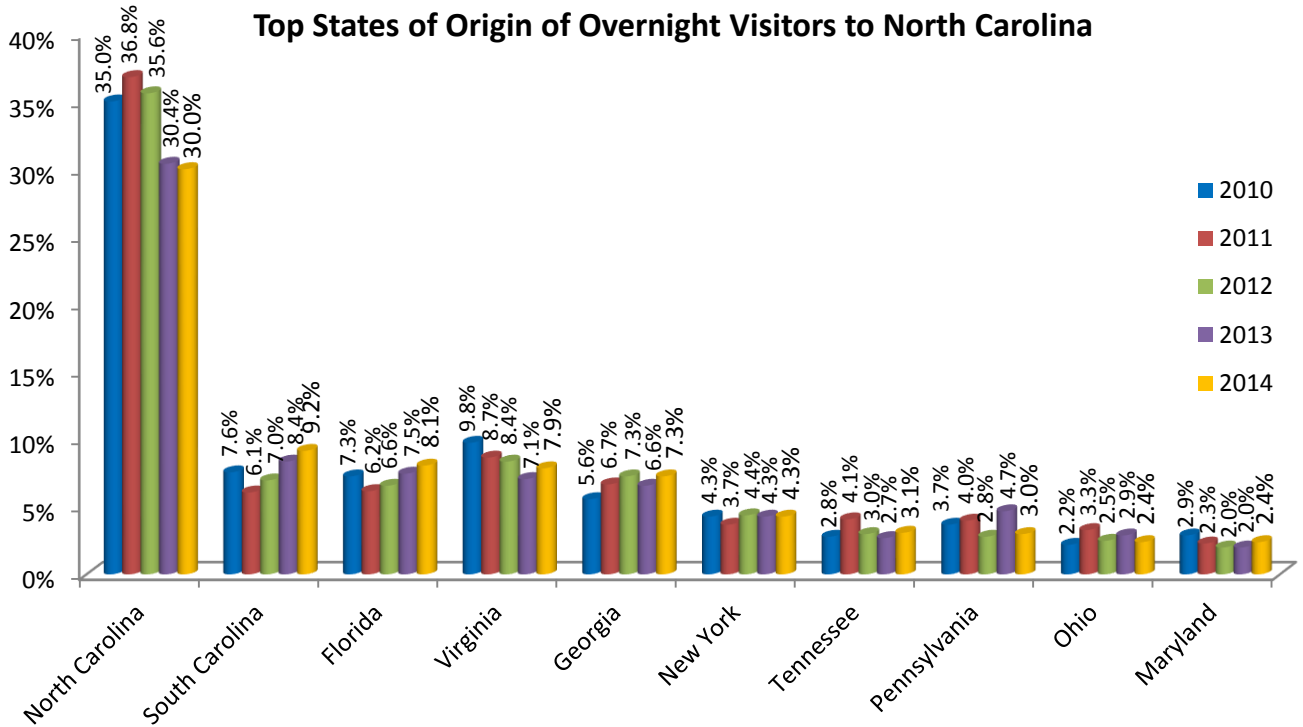
The primary mode of transportation by overnight visitors to North Carolina has remained consistent with the personal auto being the dominant form of transportation (78.9%), while about ten percent travel by air.



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 (17%) than resident visitors.

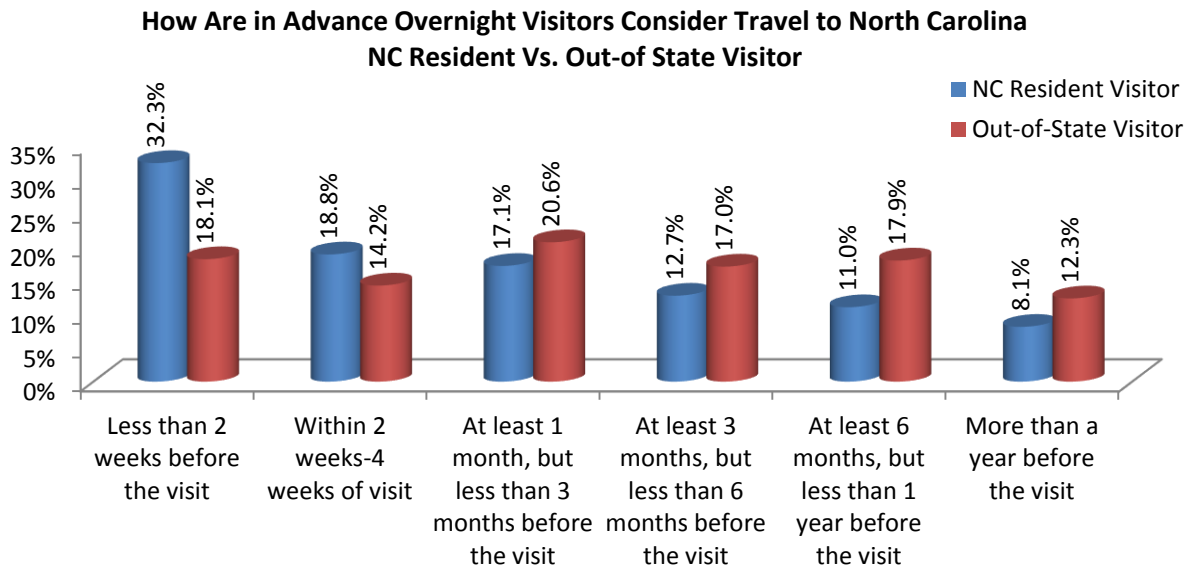
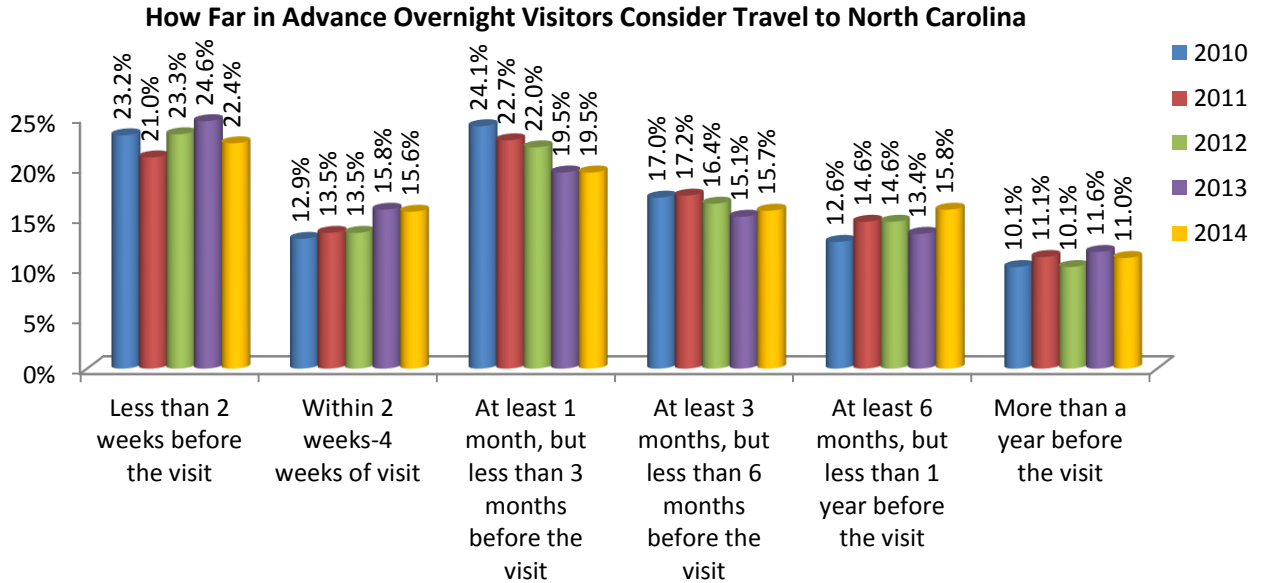
Origin of Visitors

In 2014, the top states of origin for North Carolina overnight visitors included North Carolina (30.0%), South Carolina (9.2%), Florida (8.1%), Virginia (7.9%), Georgia (7.3%) and New York (4.3%). Visitation share from each of the four top out-of-state markets increased from 2013 to 2014. The top ten out-of-state markets represent half of North Carolina overnight visitors in terms of origin.



Trip Planning

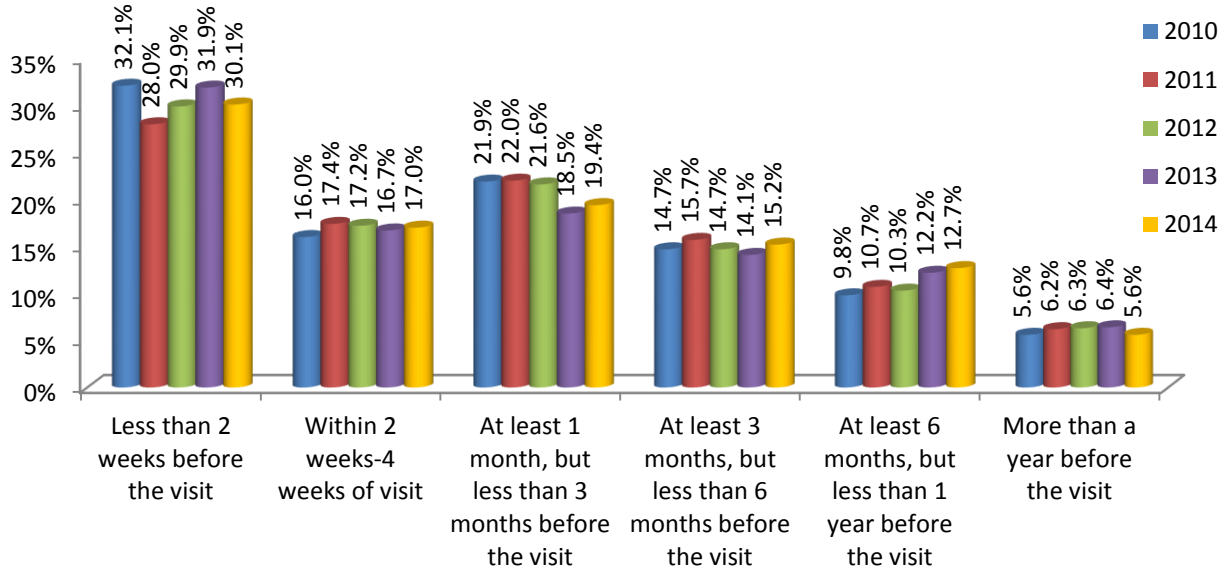
More than one-quarter of 2014 overnight visitors considered North Carolina for a visit at least six months before the visit and eleven percent considered the state more than a year before visiting. Consideration time for travel appears to be lengthening somewhat over the last several years. Twenty-seven percent of North Carolina overnight visitors considered the state at least six months prior to travel in 2014, while twenty-three percent did so in 2010.



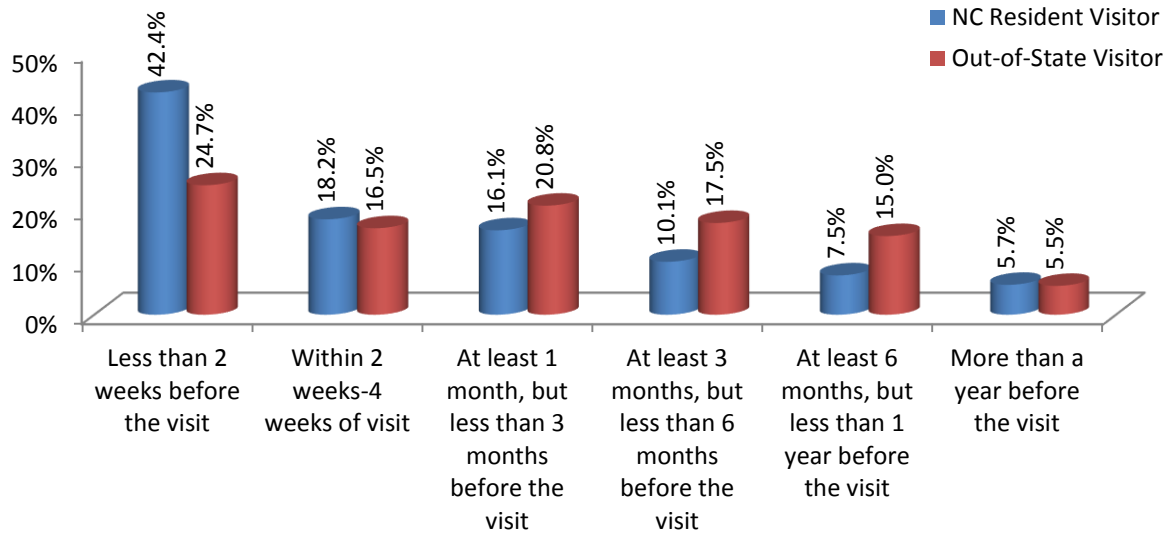
Resident visitors are nearly twice as likely to have North Carolina in the “consideration” set less than two weeks before visiting as out-of-state visitors. Out-of-state visitors are more likely to consider the state at least one month prior to travel.

Eighteen percent of overnight visitors made the decision to visit the state at least six months prior to the visit, while thirty percent of overnight visitors made the decision within two weeks of visiting.

How Far in Advance Overnight Visitors Made Decision to Travel to North Carolina



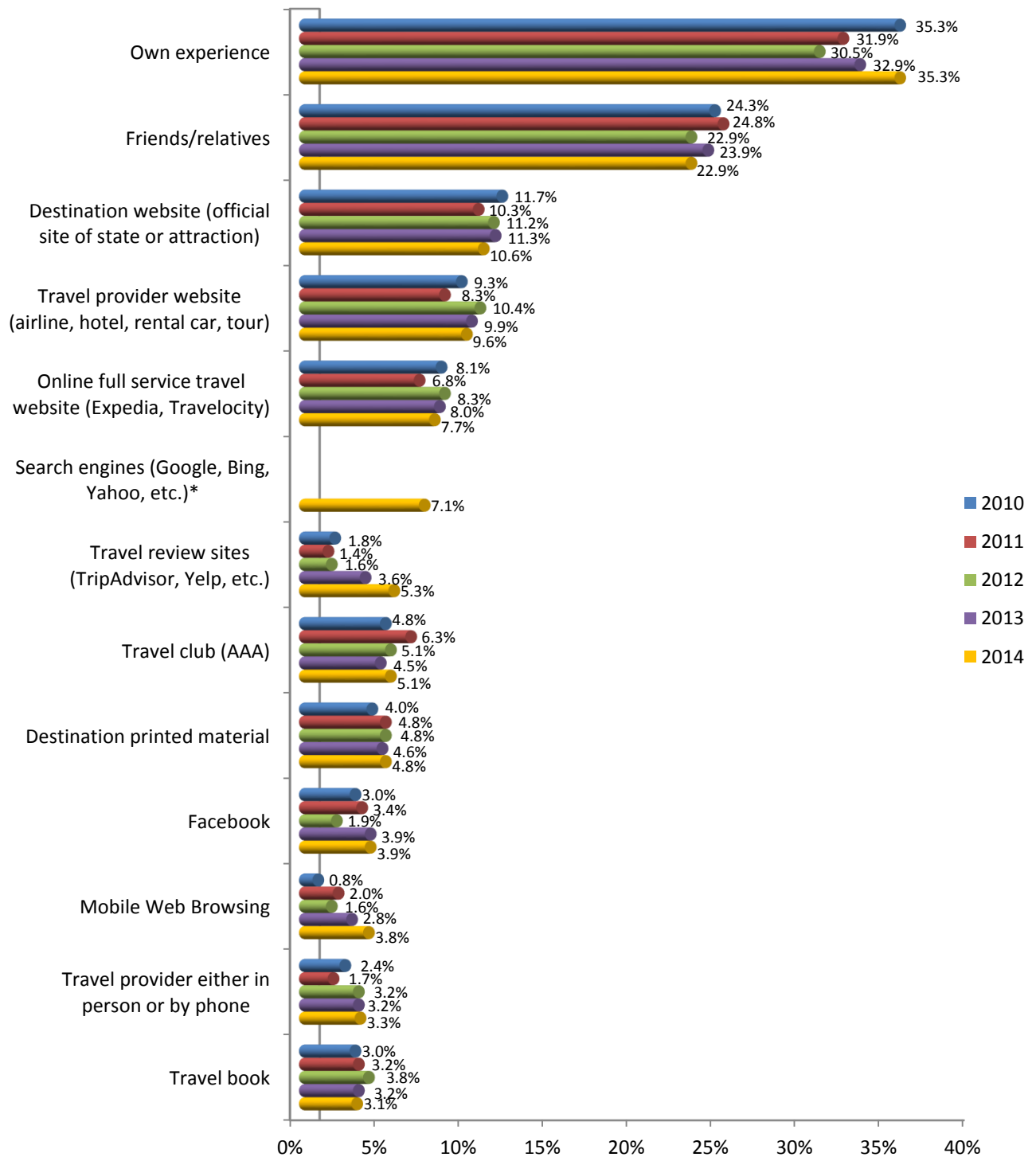
**How Far in Advance Overnight Visitors Made Decision to Travel to North Carolina
NC Resident Vs. Out-of-State Visitor**



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

Overnight visitors in 2014 used travel review sites (such as TripAdvisor or Yelp) and mobile web browsing when planning trips more often than in previous years. However, the top sources of information remain personal experience and friends/relatives.

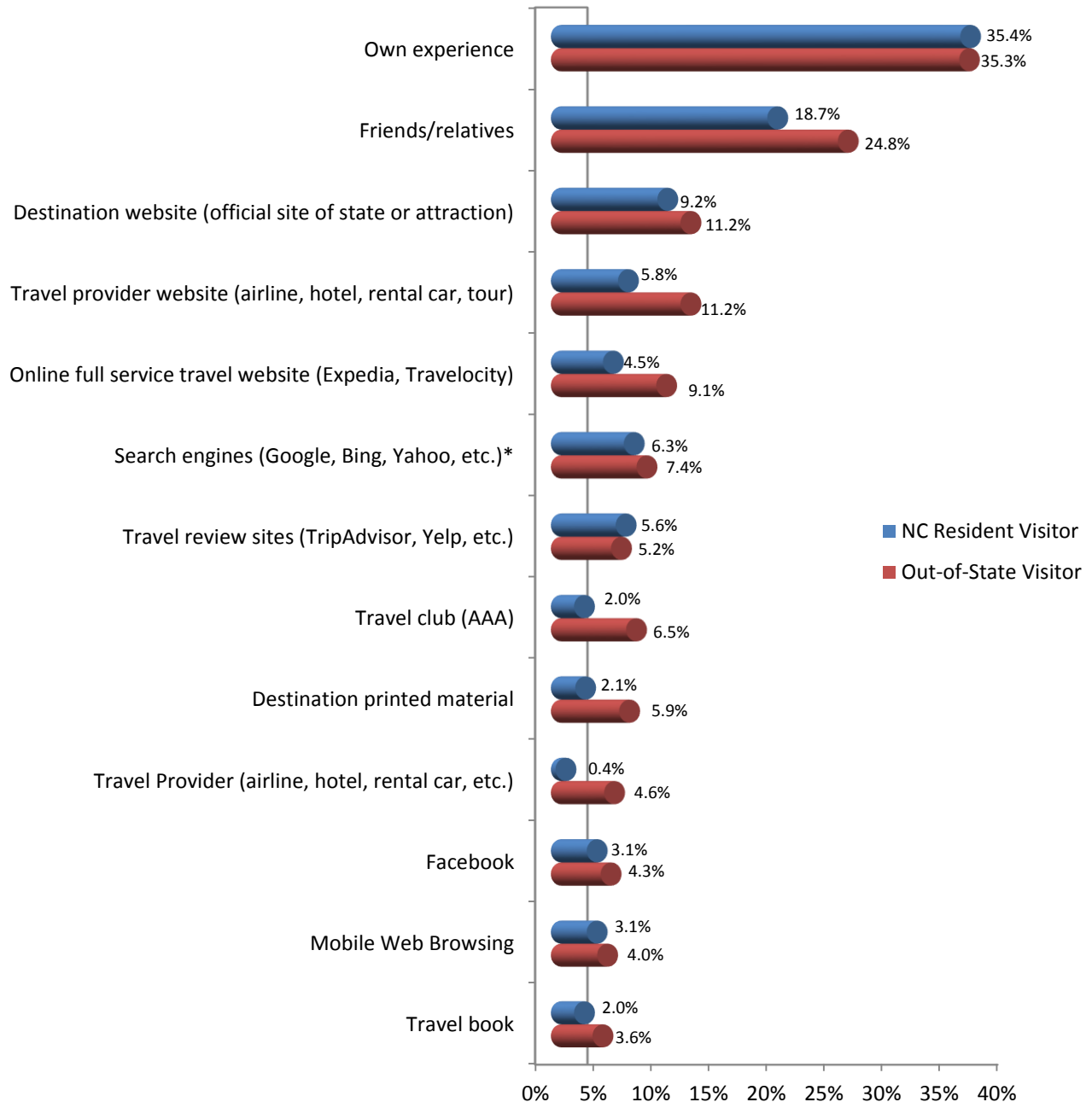
Top Sources of Information for Trip Planning



*New category

Out-of-state visitors are more likely to rely on friends/relatives, destination websites, travel provider websites, online full service websites, travel clubs and destination printed material than in-state resident. As well, out-of-state visitors tend to use travel providers, Facebook and mobile web browsing more than NC residents.

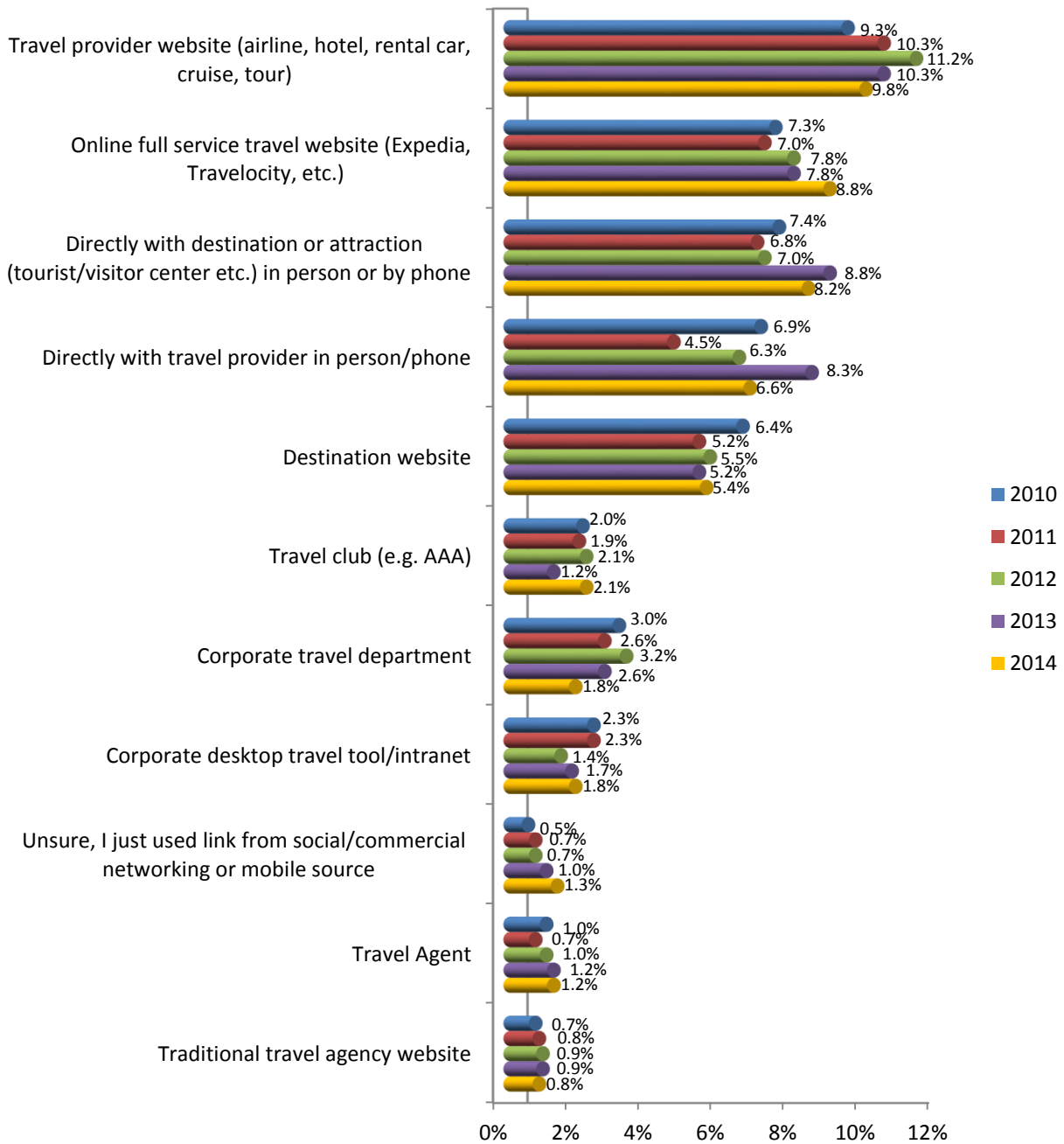
Top Sources of Information for Trip Planning NC Resident Visitor Vs. Out-of-State Visitor



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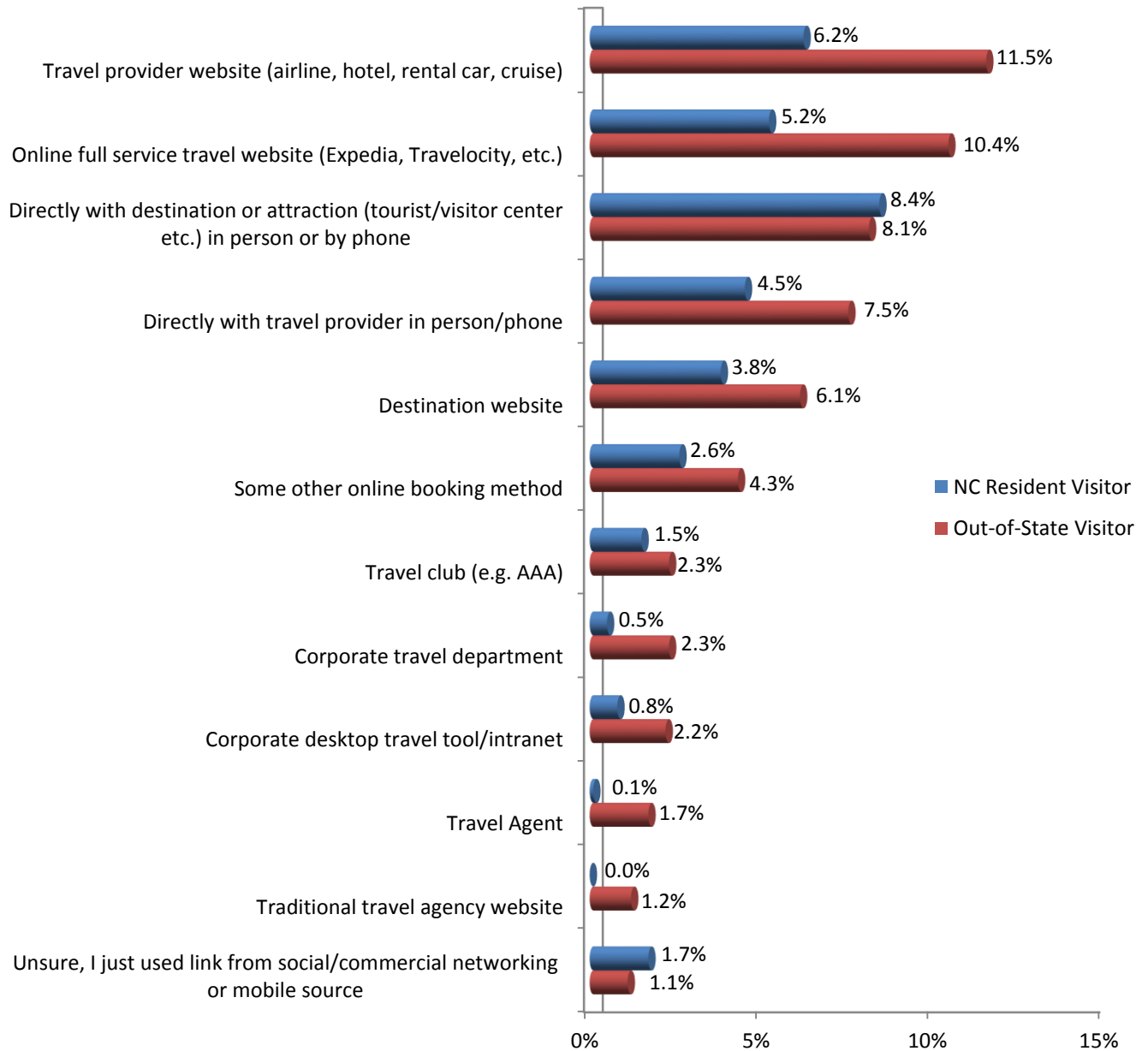
The proportion of overnight visitors booking travel through online full service travel websites such as Expedia or Travelocity increased from 2013 to 2014. Other top methods of booking travel to North Carolina continue to be travel provider websites, directly through the destination and/or travel provider via phone or in person.

Top Methods of Booking Travel



Out-of-state visitors are much more likely to use travel provider websites, full service online travel websites, destination websites and by directly contacting travel providers than resident travelers. The most common method of booking travel by resident visitors in 2014 was by contacting the destination directly.

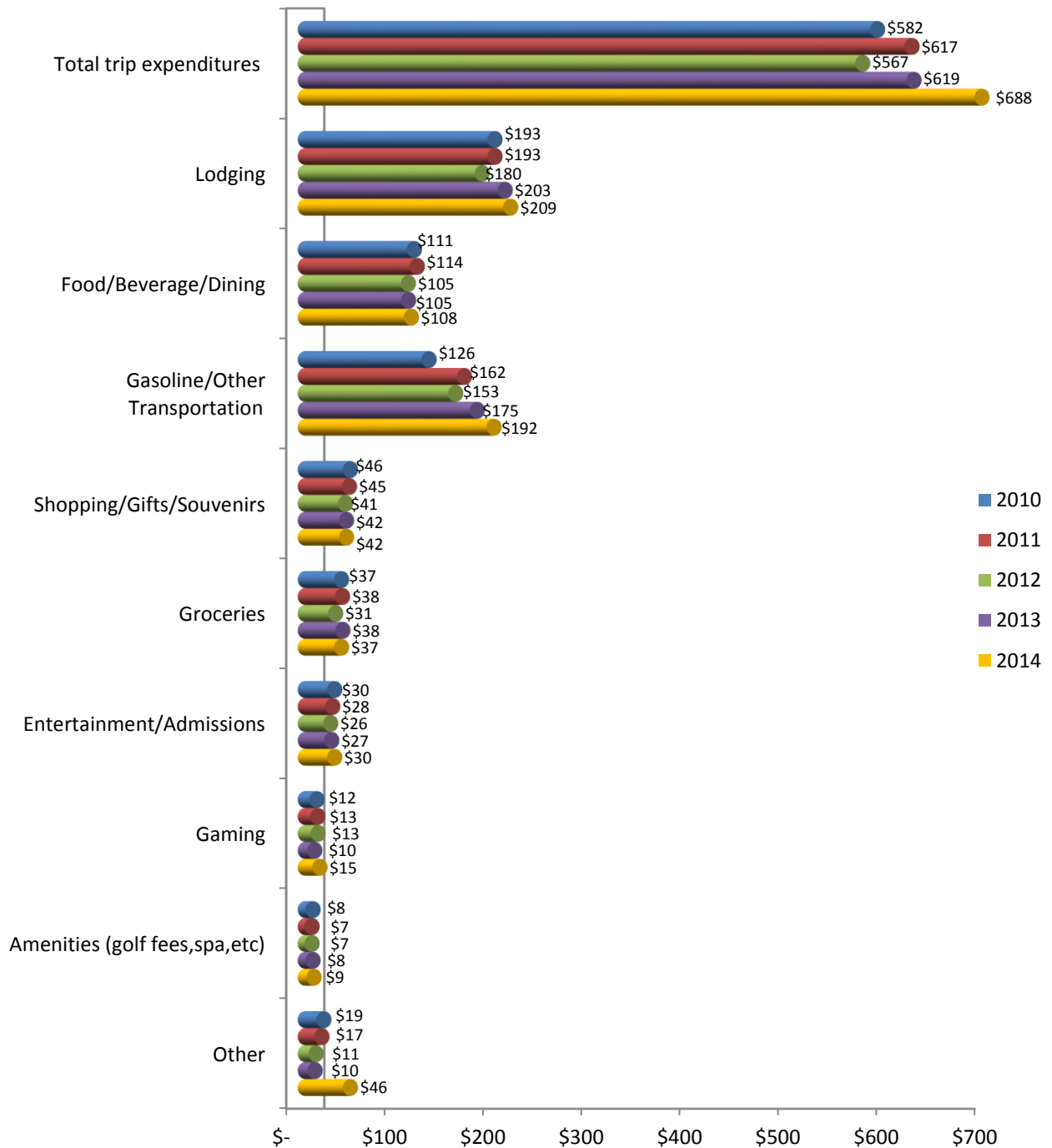
Top Methods of Booking Travel NC Resident Visitor Vs. Out-of-State Visitor



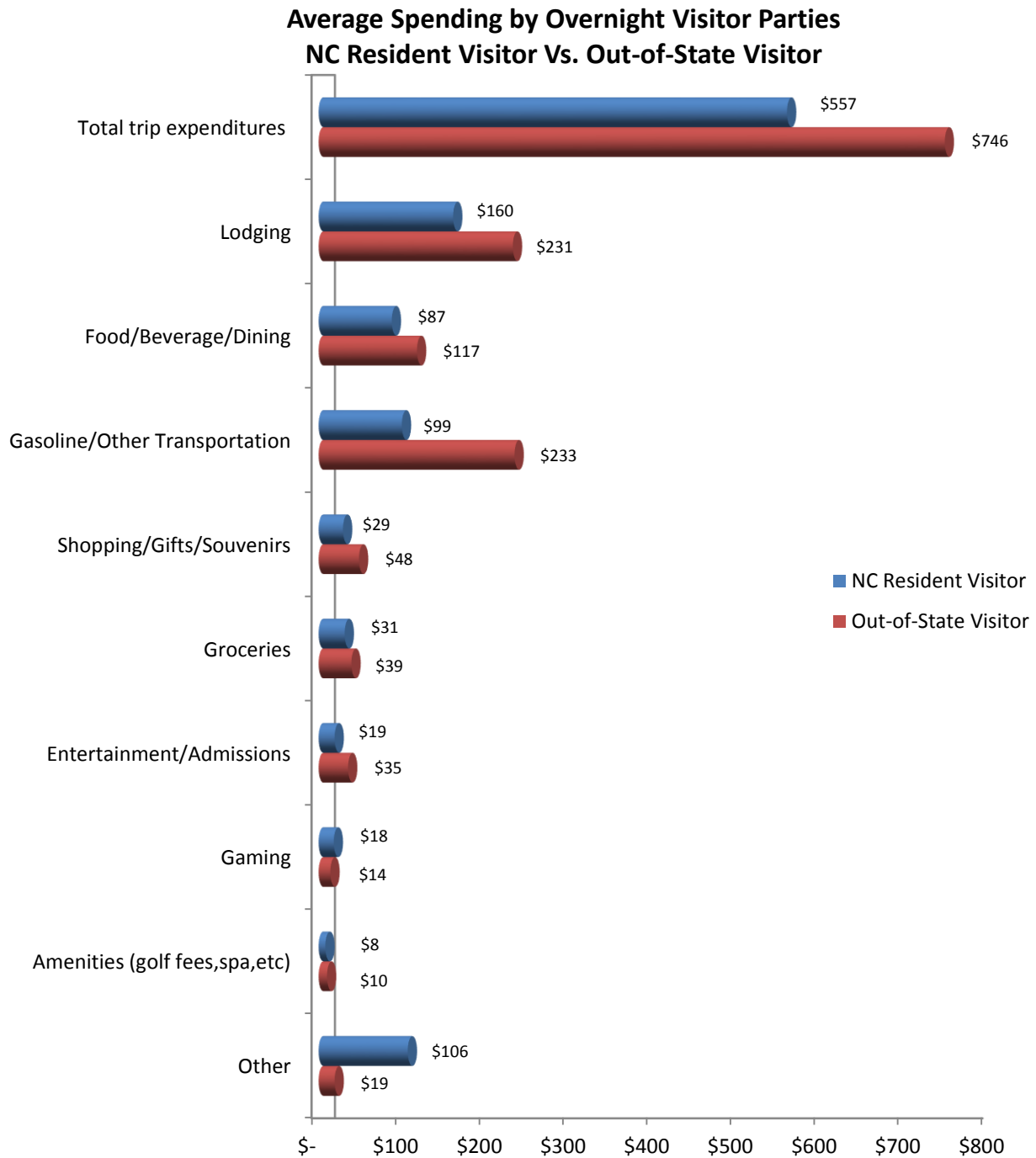
Expenditures by North Carolina Visitors

The average overnight visitor party spending in the state was \$688, up eleven percent from 2013. Lodging expenditures increased three percent, reflective of both increases in ADR and increased demand. Expenditures on food/beverage, entertainment and amenities also increased from 2013.

Average Spending by Overnight Visitor Parties



Out-of-state visitors to North Carolina spend thirty-four percent more on average per trip than resident visitors, particularly in the categories of lodging, gasoline/transportation and food/beverage. Resident visitors spend more, on average, on gaming activities and “other”.



Activities

Nearly one-third (32%) of 2014 overnight visitors to North Carolina visited relatives while traveling to the state. About one-fifth shopped (21%) and visited the beach (18%) while traveling overnight in North Carolina. Other popular activities included visiting friends (17%), rural sightseeing (13%), fine dining (12%), visiting state/national parks (11%) and visiting historic sites/churches (9%). ***Note that responses to this question are not mutually exclusive and percentages do not equal 100%. Therefore, proportions should not be aggregated to combine categories of activities. Also note that these activities do not imply purpose of trip.**

Activities Participated in by Overnight Visitors to North Carolina

Activity	2010	2011	2012	2013	2014
Visiting Relatives	34%	34%	32%	31%	32%
Shopping	21%	22%	21%	22%	21%
Beach	17%	15%	18%	21%	18%
Visiting Friends	20%	18%	17%	19%	17%
Rural Sightseeing	13%	16%	14%	14%	13%
Fine Dining	14%	14%	13%	14%	12%
State/National Park	9%	9%	8%	9%	11%
Historic Sites/Churches	9%	10%	9%	8%	9%
Urban Sightseeing	7%	9%	8%	7%	7%
Museums	7%	7%	6%	9%	7%
Wildlife Viewing	6%	7%	6%	6%	7%
Old Homes/Mansions	5%	6%	4%	5%	6%
Hiking/Backpacking	4%	4%	4%	6%	4%
Nightclubs/Dancing	4%	4%	4%	5%	4%
Art Galleries	3%	4%	3%	4%	4%
Zoos/Aquariums/Aviaries	2%	2%	3%	2%	4%
Gardens	4%	4%	4%	4%	3%
Nature Travel/Eco-touring	3%	4%	3%	4%	3%
Bird Watching	3%	3%	2%	3%	3%
Fishing (fresh or saltwater)	4%	3%	4%	4%	3%
Casino/Gaming	3%	3%	3%	3%	3%
Special Events/Festivals	3%	3%	3%	3%	3%
Wine Tasting/Winery Tour	2%	2%	3%	3%	3%
Golf	3%	3%	3%	3%	3%
Theme Park/Amusement Park/Water Park	2%	1%	2%	2%	3%
Craft Breweries	N/A	N/A	N/A	2%	3%
Local/folk arts/crafts	N/A	N/A	N/A	N/A	3%
Biking/Road Biking/Cycling	2%	2%	2%	2%	2%
Theater/Drama	2%	2%	2%	2%	2%
Other nature (photography, rockhounding, etc.)	N/A	N/A	N/A	N/A	2%
Whitewater Rafting/Kayaking/Canoeing	2%	1%	2%	1%	2%
Youth/Amateur/Collegiate/Professional Sporting Event	2%	2%	2%	1%	2%
Spa/Health Club	2%	2%	1%	2%	1%
Musical Theater	1%	1%	1%	2%	1%
Rock/Mountain climbing	1%	1%	1%	1%	1%
Musical performance/show	N/A	N/A	N/A	N/A	1%
Area where a TV show or movie was filmed	N/A	N/A	N/A	1%	1%
Horseback riding	1%	1%	1%	1%	1%
Farms/Ranches/Agri-tours	N/A	N/A	N/A	N/A	1%
Motor Sports	2%	3%	2%	1%	1%
Skiing/snowboarding	1%	1%	<1%	1%	1%
Motorboat/Jet ski	<1%	1%	1%	2%	1%
Symphony/Opera/Concert	<1%	2%	1%	1%	1%

Out-of-state visitors are statistically more likely to spend time visiting relatives, shopping, rural sightseeing, fine dining, visiting state/national parks, visiting historic sites/churches, museums, old homes/mansions, urban sightseeing, dancing, gardens, participating in nature travel, wine tasting and experiencing local crafts than resident overnight visitors. Statistically, the only activity that resident visitors participate in more often than out-of-state visitors is fishing. Out-of-staters participate in a larger number of activities per trip than resident visitors (2.7 vs. 2.0 per trip on average respectively). This is likely affected by length of stay.

**Activities Participated in by 2014 Overnight Visitors to North Carolina
NC Resident Vs. Out-of-State Visitors**

Activity	NC Resident Visitor	Out-of-State Visitor
Visiting Relatives	28%	34%
Shopping	16%	23%
Visiting Friends	16%	18%
Beach	19%	17%
Rural Sightseeing	10%	14%
Fine Dining	10%	14%
State/National Park	8%	13%
Historic Sites/Churches	5%	12%
Museums	5%	9%
Old Homes/Mansions	2%	8%
Urban Sightseeing	4%	8%
Wildlife Viewing	7%	7%
Hiking/Backpacking	4%	5%
Nightclubs/Dancing	2%	4%
Art Galleries	4%	4%
Zoos/Aquariums/Aviaries	4%	4%
Gardens	2%	4%
Nature Travel/Eco-touring	2%	4%
Casino/Gaming	2%	4%
Wine Tasting/Winery Tour	2%	4%
Theme Park/Amusement Park/Water Park	2%	4%
Local/folk arts/crafts	2%	4%
Bird Watching	3%	3%
Fishing (fresh or saltwater)	5%	3%
Special Events/Festivals	3%	3%
Golf	2%	3%
Craft Breweries	3%	3%
Other nature (photography, rockhounding, etc.)	1%	3%
Youth/Amateur/Collegiate/Professional Sporting Event	2%	3%
Biking/Road Biking/Cycling	2%	2%
Theater/Drama	1%	2%
Whitewater Rafting/Kayaking/Canoeing	2%	2%
Musical Theater	1%	2%
Skiing/snowboarding	1%	2%
Spa/Health Club	2%	1%
Rock/Mountain climbing	1%	1%
Musical performance/show	1%	1%
Area where a TV show or movie was filmed	1%	1%
Horseback riding	N/A	1%
Farms/Ranches/Agri-tours	1%	1%
Motor Sports	1%	1%
Motorboat/Jet ski	2%	1%
Symphony/Opera/Concert	1%	1%

**shaded activities show statistically significant difference at the 95% level between resident and out-of-state visitor participation.*

Demographic Profile of North Carolina Overnight Visitors

More than half (55.1%) of the overnight visitors to North Carolina are married and twenty-three percent of the region's visitors are divorced, widowed or separated. A larger proportion of out-of-state visitors to the state are currently married (58%) than resident visitors (50%). Twenty-one percent of out-of-state visitors are divorced, widowed or separated, while the same is true of twenty-five percent of resident visitors.

The largest proportion of North Carolina overnight visitors, both resident and out-of-state, classify themselves as white (87%). Seven percent classify themselves as black/African American. This is down from eleven percent in 2013. A larger proportion of resident visitors are black/African American (8%) than out-of-state visitors (6%). Two percent of out-of-state visitors, while less than one percent of resident visitors, classify themselves as Asian American,

Nearly two-thirds (62.3%) of North Carolina overnight visitor parties have a household head with a college degree or higher. The average overnight visitor is 47 years old. Fifty-seven percent of resident visitors have a household head with a college degree or higher, while sixty-five percent of out-of-state visitors have a college degree or higher. The NC resident overnight visitor is slightly younger (46 years old) than the out-of-state overnight visitor (48 years old).

The average North Carolina overnight visitor has 13.6 vacation days each year. North Carolina resident overnight visitors reported having 11.0 vacation days per year, while out-of-state overnight visitors reported having 14.8 days.

The average household income of overnight visitors to North Carolina in 2014 was \$74,400, with forty percent reporting a household income \$75,000 or more. Nearly thirteen percent had a household income of over \$125,000. The average household income of resident overnight visitors was \$65,000 in 2014. The average household income of out-of-state overnight visitors in 2014 was \$79,700.

More than sixty percent (62.2%) 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 (21%) are slightly more likely to be retired than resident visitors (19%).

The average household size of a North Carolina overnight visitor party in 2014 was 2.4. This was the case for both in-state and out-of-state visitors.

2014 Top Advertising Markets

In 2014, the top advertising markets sending overnight visitors to **North Carolina** were Raleigh-Durham-Fayetteville (12.5%), Charlotte (9.7%), Greensboro-Winston-Salem-High Point (7.7%), Atlanta (6.3%), Greenville-Spartanburg-Asheville (3.9%), New York (3.4%), Washington DC (2.9%), and Norfolk-Portsmouth-Newport News (2.5%). Advertising markets correspond with Nielsen's Designated Market Areas (DMAs).

Top Advertising Markets of Origin for 2014 North Carolina *Overnight* Visitors

DMA of Origin	2010 Percentage of Total Overnight Visitors	2011 Percentage of Total Overnight Visitors	2012 Percentage of Total Overnight Visitors	2013 Percentage of Total Overnight Visitors	2014 Percentage of Total Overnight Visitors
Raleigh-Durham (Fayetteville)	12.2%	10.4%	10.5%	13.0%	12.5%
Charlotte	8.5%	8.4%	9.5%	9.0%	9.7%
Greensboro-High Point-Winston Salem	5.9%	6.3%	6.7%	6.3%	7.7%
Atlanta	4.6%	5.7%	4.8%	5.3%	6.3%
Greenville-Spartanburg-Asheville-Anderson	4.3%	3.8%	4.8%	4.5%	3.9%
New York, NY	4.0%	4.5%	4.0%	4.2%	3.4%
Washington DC (Hagerstown, MD)	4.6%	3.2%	3.9%	4.0%	2.9%
Norfolk-Portsmouth-Newport News	2.4%	2.3%	2.3%	2.3%	2.5%
Roanoke/Lynchburg, VA	1.6%	1.4%	1.9%	1.6%	2.4%
Greenville-New Bern-Washington	4.0%	3.3%	3.3%	3.5%	2.3%
Columbia, SC	1.9%	1.6%	1.6%	2.2%	2.2%
Richmond-Petersburg, VA	1.2%	1.9%	1.7%	1.6%	2.0%
Wilmington	1.9%	1.9%	1.1%	2.4%	1.8%
Baltimore	1.0%	1.4%	1.1%	0.9%	1.6%
Philadelphia, PA	2.3%	2.2%	1.3%	2.0%	1.5%
Tampa-St. Petersburg (Sarasota)	2.5%	2.5%	2.6%	1.7%	1.5%
Charleston, SC	1.2%	1.1%	1.0%	1.2%	1.5%
Myrtle Beach-Florence	1.0%	1.6%	1.2%	0.8%	1.4%
Orlando-Daytona Beach-Melbourne	2.3%	1.8%	1.7%	1.7%	1.3%
Knoxville	1.2%	3.3%	1.1%	0.6%	1.1%
Pittsburgh	1.2%	1.1%	1.1%	1.3%	1.1%
Jacksonville, FL	0.5%	0.8%	0.7%	0.4%	1.0%
West Palm Beach-Ft. Pierce	1.4%	0.7%	1.0%	0.9%	1.0%

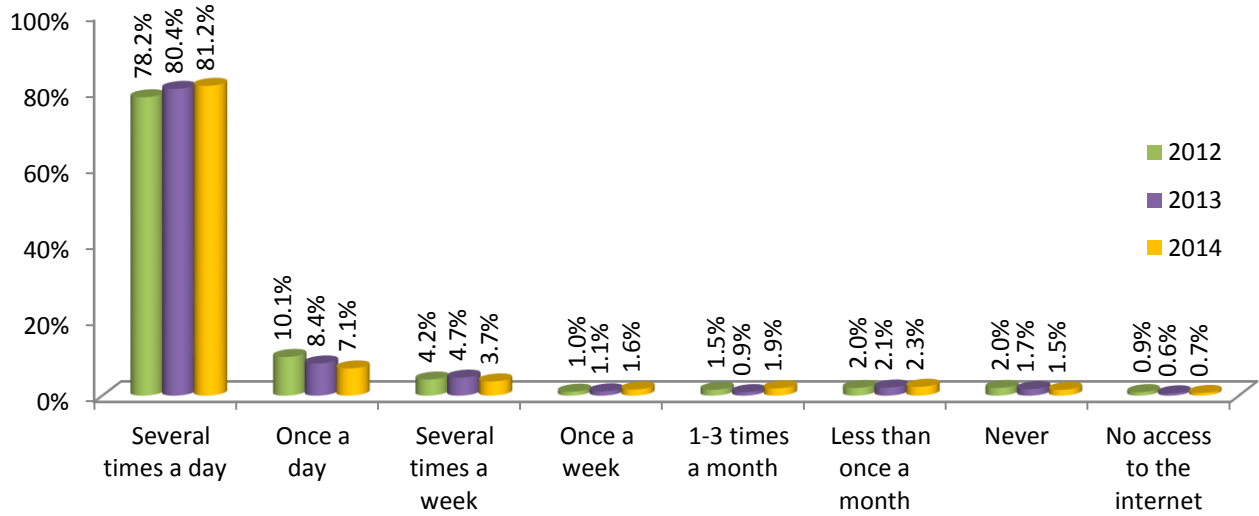
Note: Advertising markets defined by Nielsen's Designated Market Area (DMA)

The following section provides information regarding online activities of visitors who traveled to North Carolina in 2014.

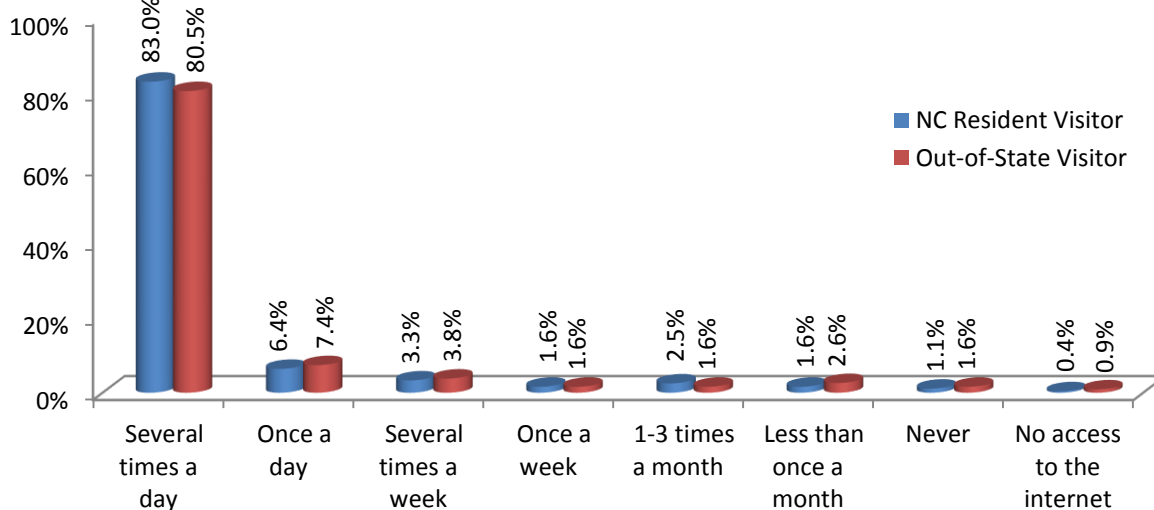
Importance of Internet

More than eighty-one percent of North Carolina overnight visitors indicate that they access the Internet at least several times daily, a proportion that has slowly been growing. Nearly ninety percent indicate that they use the Internet as least once per day. Less than one percent does not have Internet access.

Frequency of Internet Use by 2014 North Carolina Overnight Visitors



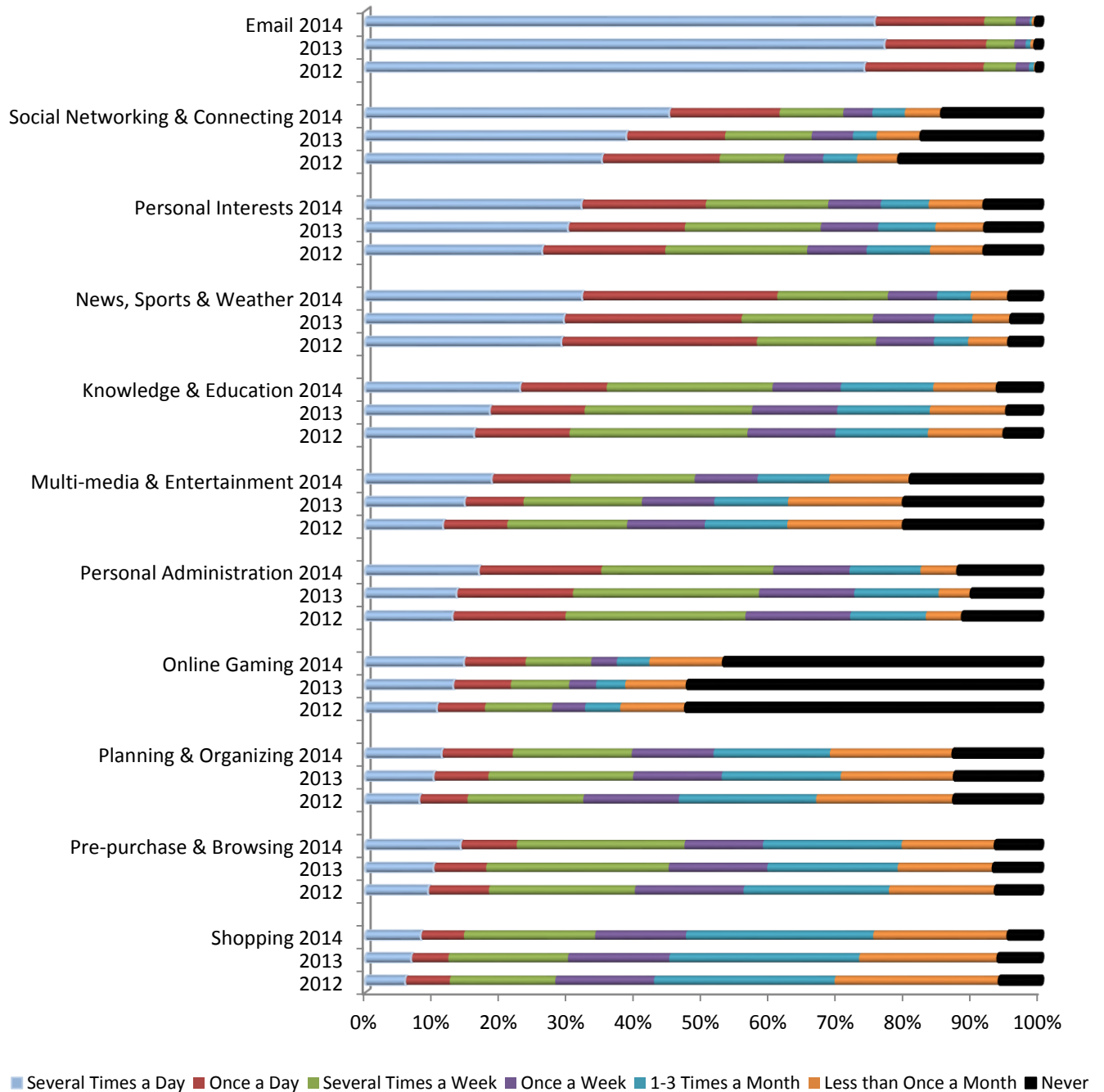
**Frequency of Internet Use by 2014 North Carolina Overnight Visitors
NC Resident Visitor Vs. Out-of-State Visitor**



Resident visitors to North Carolina access the Internet only slightly more often than out-of-state visitors. However, the vast majority of both types of visitors access the Internet at least once per day.

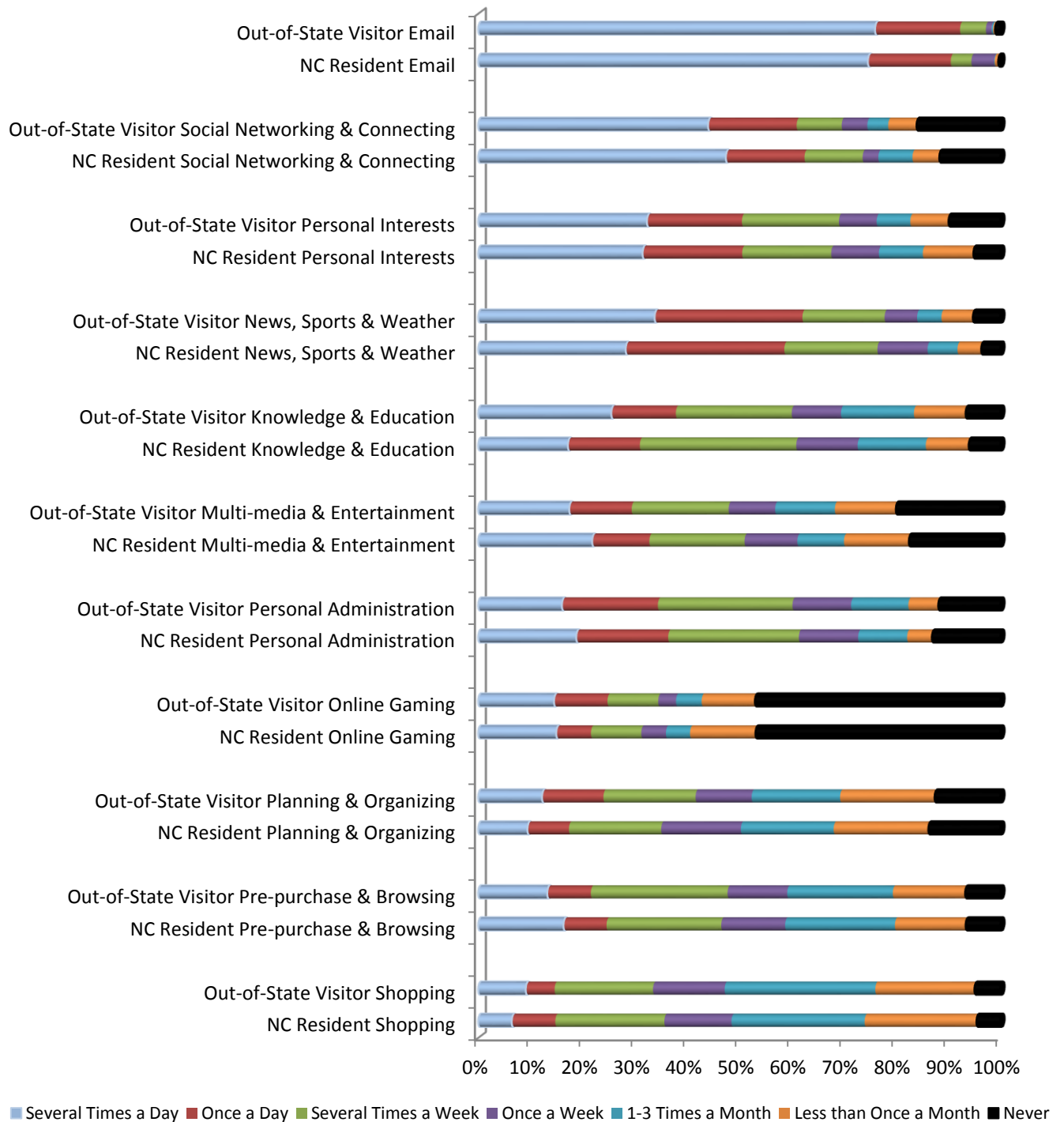
Visitors use the Internet for a variety of purposes, some more often than others. Three-fourths of overnighters use email several times a day, while nearly half use social media several times a day. The proportion of visitors using social media once to several times a day has increased steadily over the last several years. The frequent use of multimedia entertainment is increasing. Those using it at several times a week or more often has increased from 39 percent in 2012 to 49 percent in 2014.

Frequency of Online Activities of North Carolina Overnight Visitors



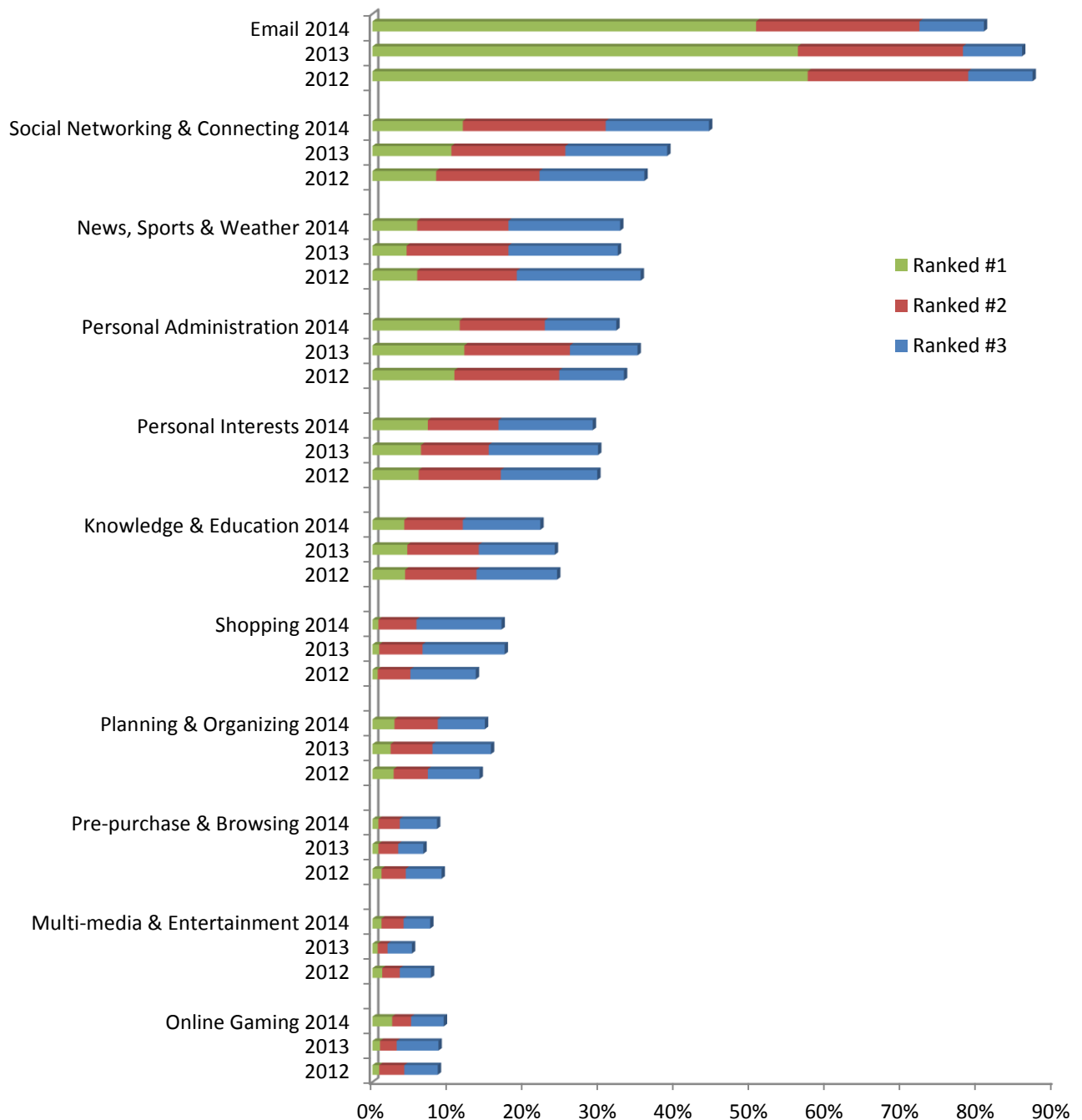
Use of the Internet is similar between North Carolina resident visitors and out-of-state visitors. Out-of-state use the Internet slightly more often for “knowledge and education” than resident visitors, while resident visitors tend to use the Internet more often for “social networking and connecting”.

Frequency of Online Activities of North Carolina Overnight Visitors NC Resident Visitor Vs. Out-of-State Visitor



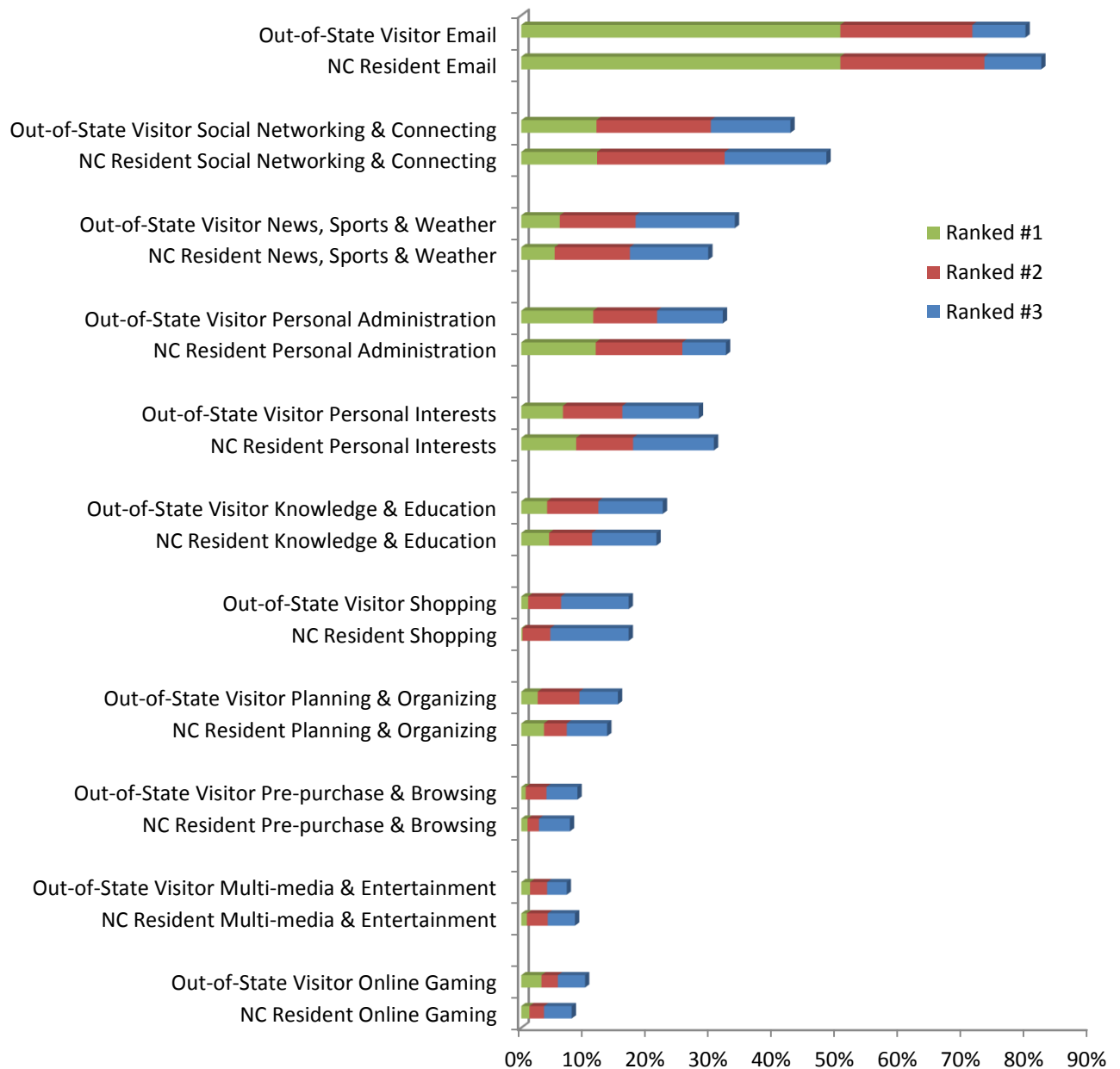
Email ranks the highest in terms of importance of online activity for North Carolina overnight visitors, though it's importance is slipping somewhat. Approximately nineteen percent of visitors did not rank email in the top three in 2014 as compared to twelve percent in 2012. Social networking and connecting is becoming more of an important activity for overnight visitors. Nearly half (44 percent) ranked this activity in the top three in 2014 as compared to thirty-six percent in 2012.

Online Activities Ranked by Importance to 2014 North Carolina Overnight Visitors



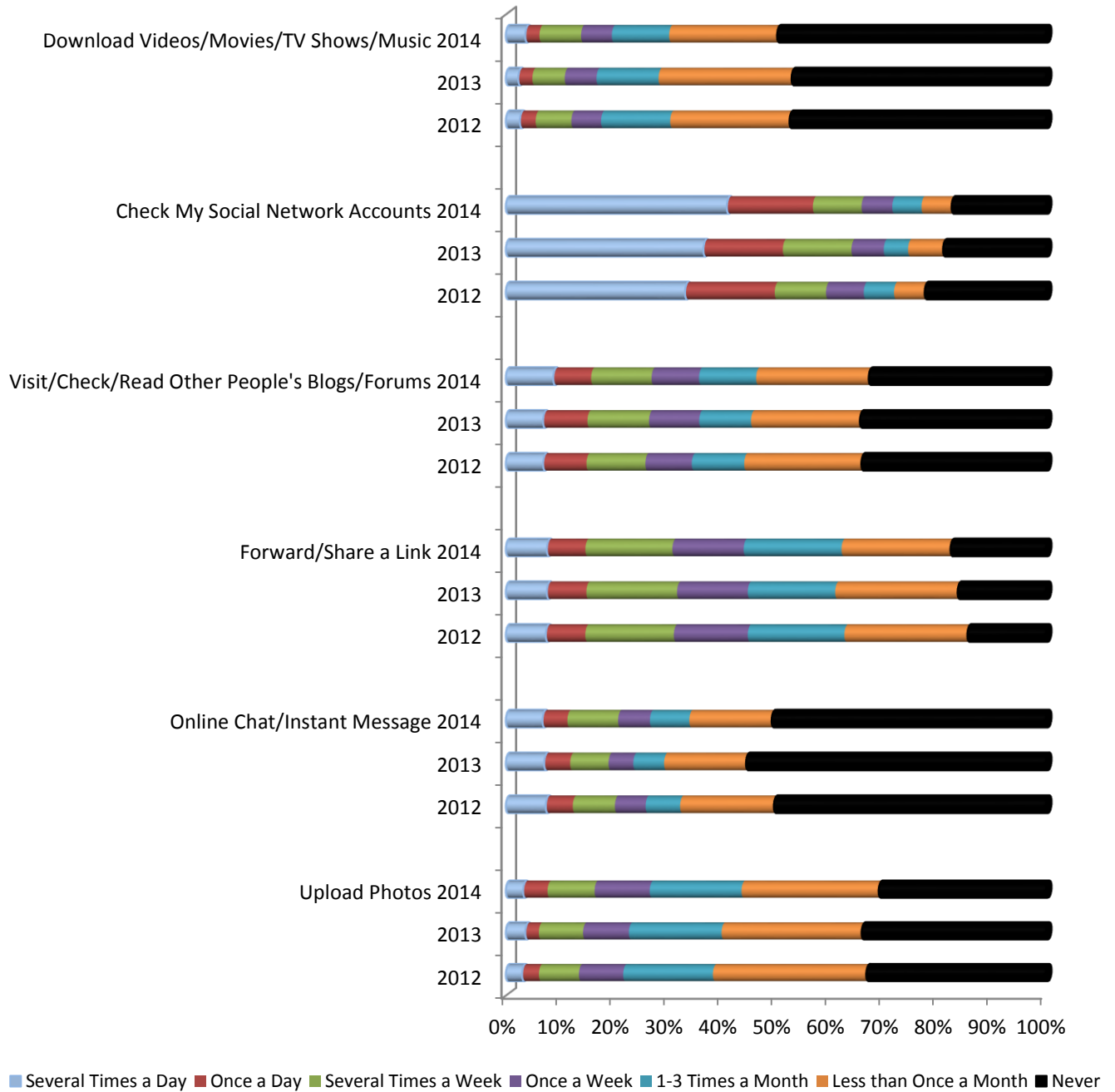
Importance of online activities between resident visitors and out-of-state visitors is similar. Residents place a slightly higher importance on social networking and connecting than out-of-state visitors, while out-of-state visitors place slightly higher importance on news, sports and weather.

Online Activities Ranked by Importance to 2014 Overnight Visitors NC Resident Visitor Vs. Out-of-State Visitor



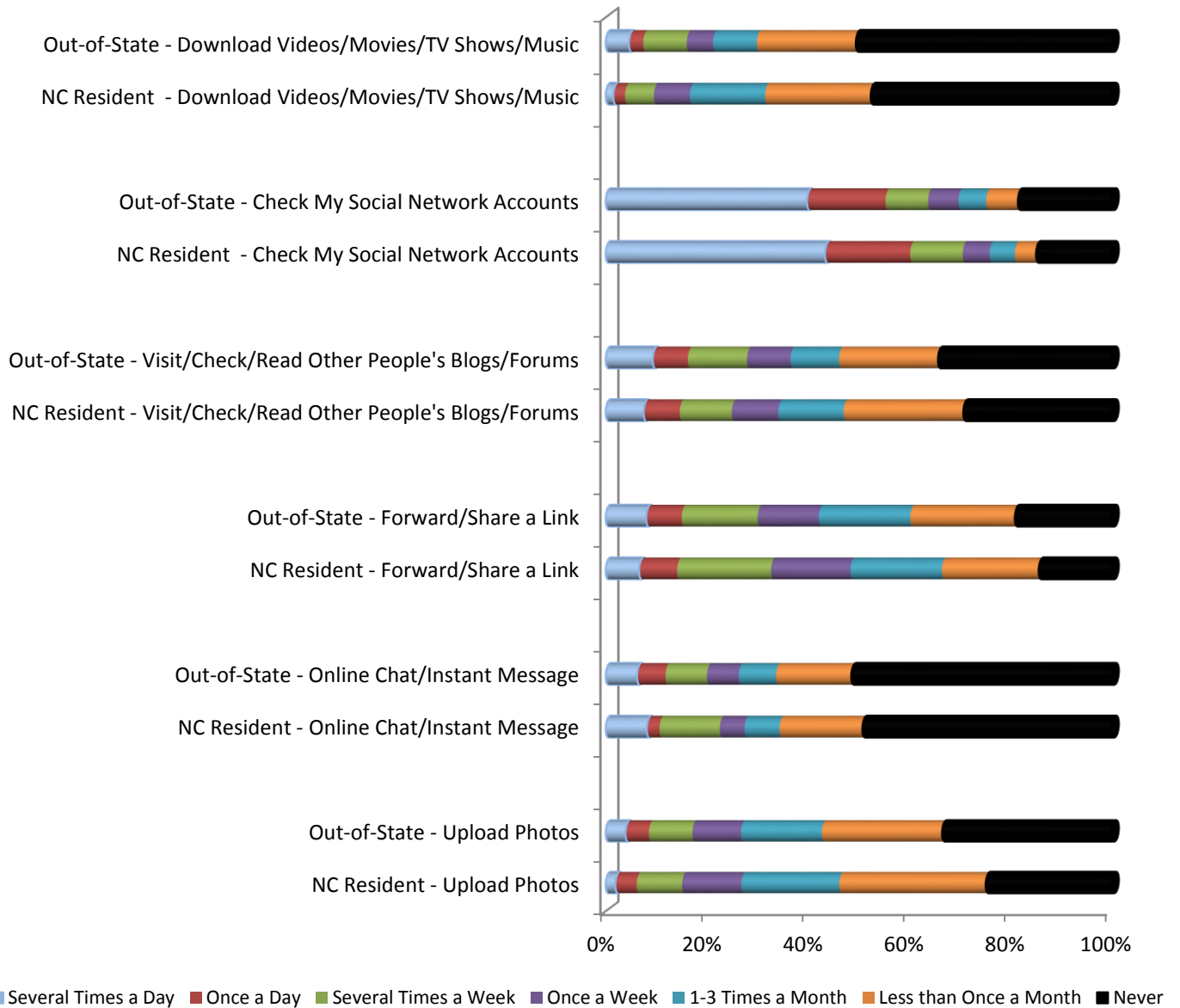
Other frequent online activities of overnight visitors to the state include checking social media accounts, forwarding links and reading blogs/forums. The frequency of which visitors check social network accounts is on the rise. In 2012, thirty-three percent responded that they checked the accounts several times a day. The proportion rose to forty-one percent in 2014.

Other Online Activities of North Carolina Overnight Visitors



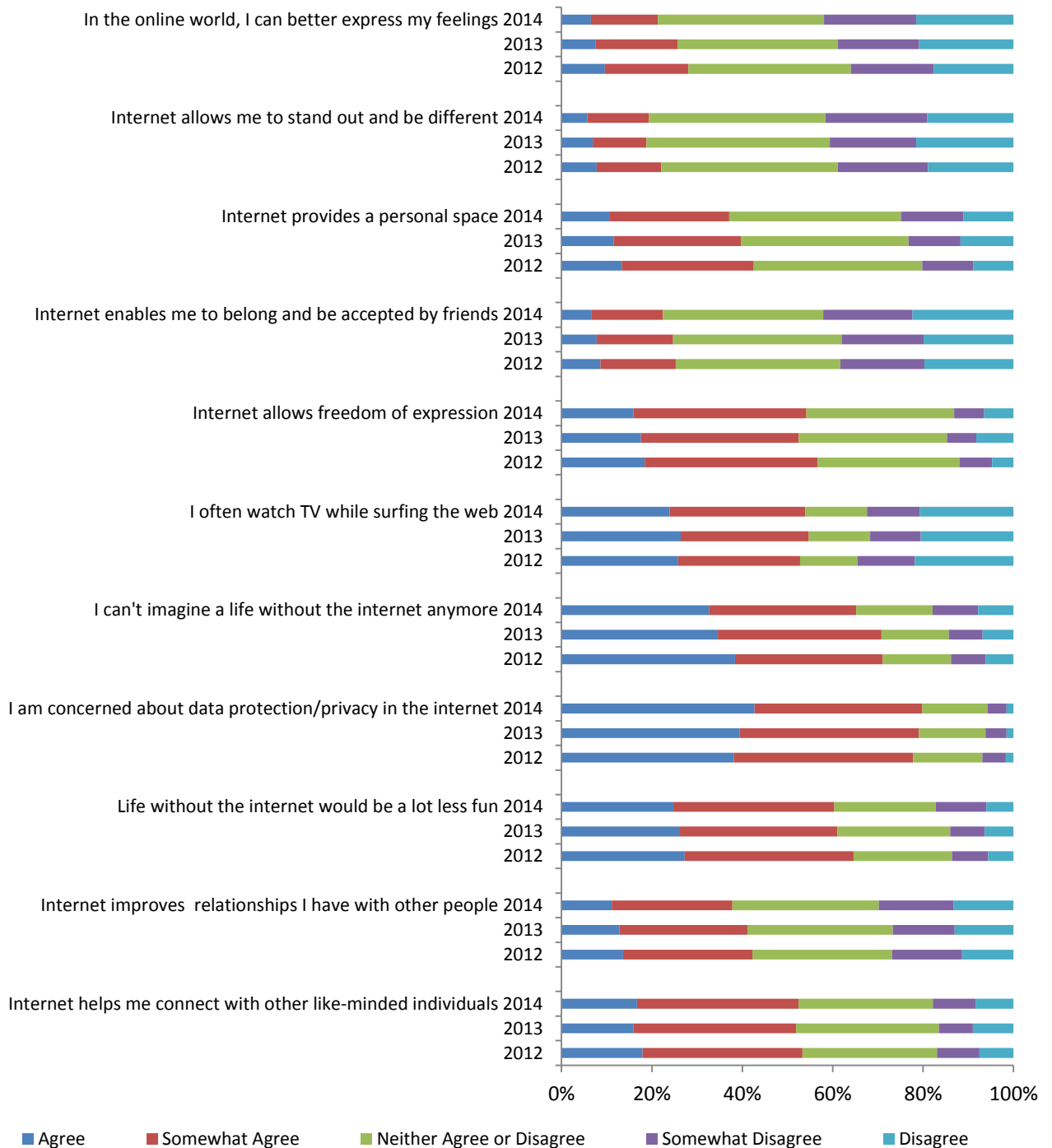
Participation in other online activities by North Carolina overnight visitors is similar between out-of-state visitors and resident visitors. Resident visitors report that they check social networking accounts and forward/share links more often than out-of-state visitors, while out-of-state visitors report that they download videos or movies more often than resident visitors.

Other Online Activities of North Carolina Overnight Visitors NC Resident Visitor Vs. Out-of-State Visitor



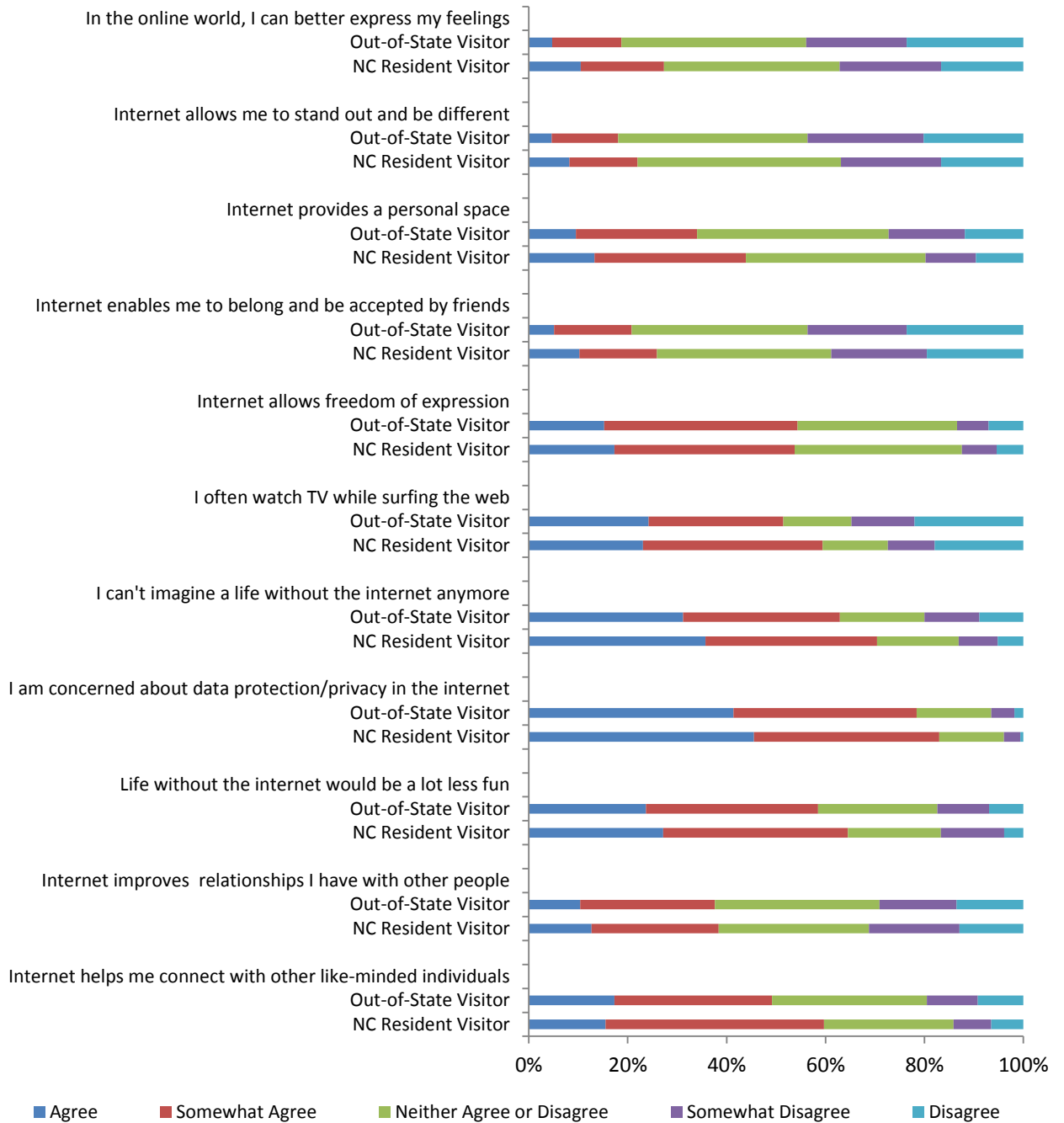
More than three-quarters (80%) of overnight visitors to North Carolina are concerned about data protection/privacy on the Internet, yet nearly two-thirds of respondents (65%) strongly agree or agrees that they can't imagine life without it anymore. More than half (60%) strongly agree or agree that life without the Internet would be a lot less fun.

Personal Views of the Internet of North Carolina Overnight Visitors



North Carolina resident visitors agree more that they can better express their feelings via the Internet, that it provides a personal space and that it helps them connect with like-minded individuals, but they also more concern about privacy on the Internet than out-of-state visitors.

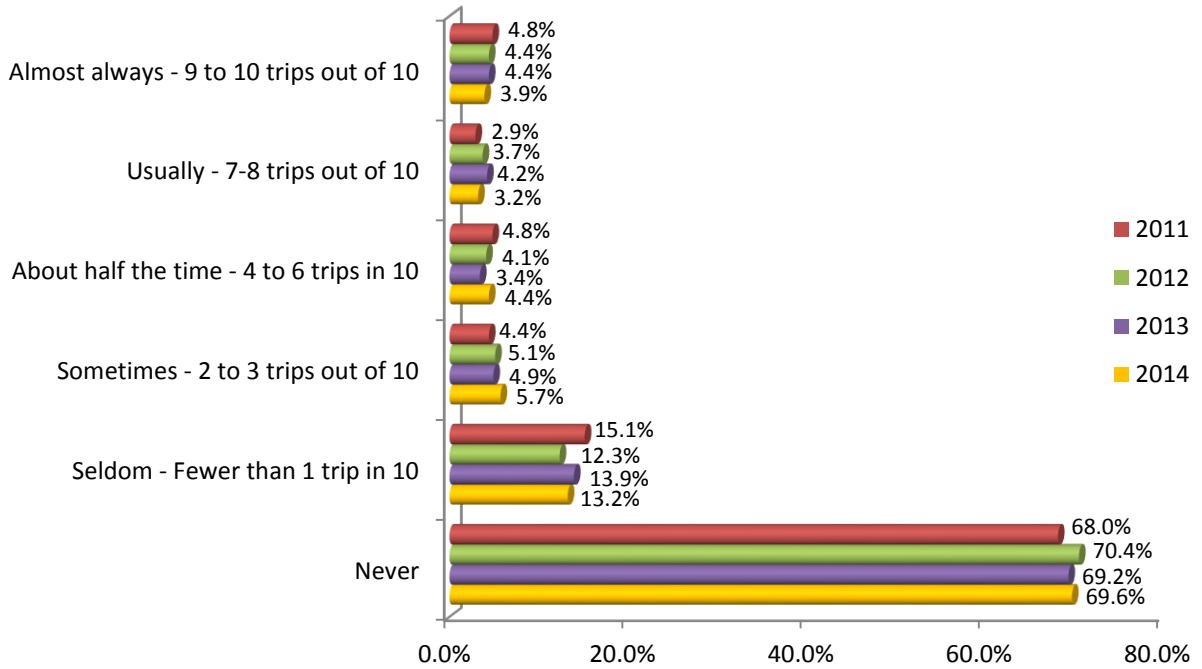
Personal Views of the Internet of North Carolina Overnight Visitors NC Resident Visitor Vs. Out-of State Visitor



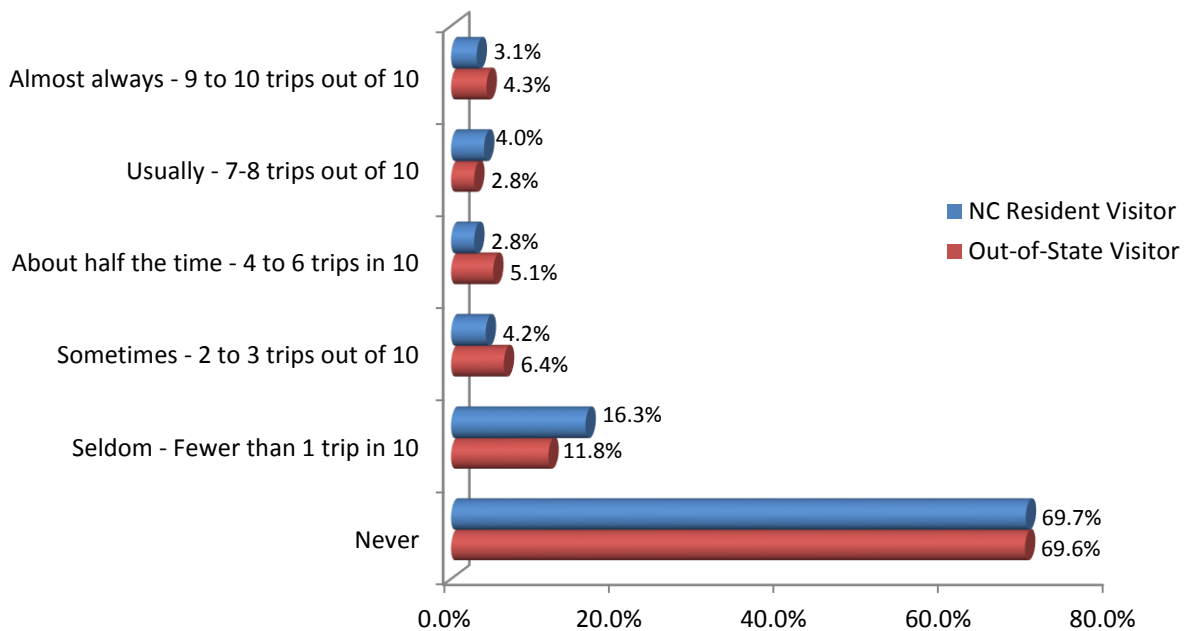
Vacation Attitudes

The majority of overnight visitors to North Carolina do not travel with pets, and those who do are doing so less frequently than in previous years. Four percent of 2014 overnight visitors responded that they almost always travel with their pets, down from five percent in 2011. Out-of-state visitors are only slightly more likely to travel with a pet than resident visitors.

How Often Do You Take Leisure Trips with your Pets?

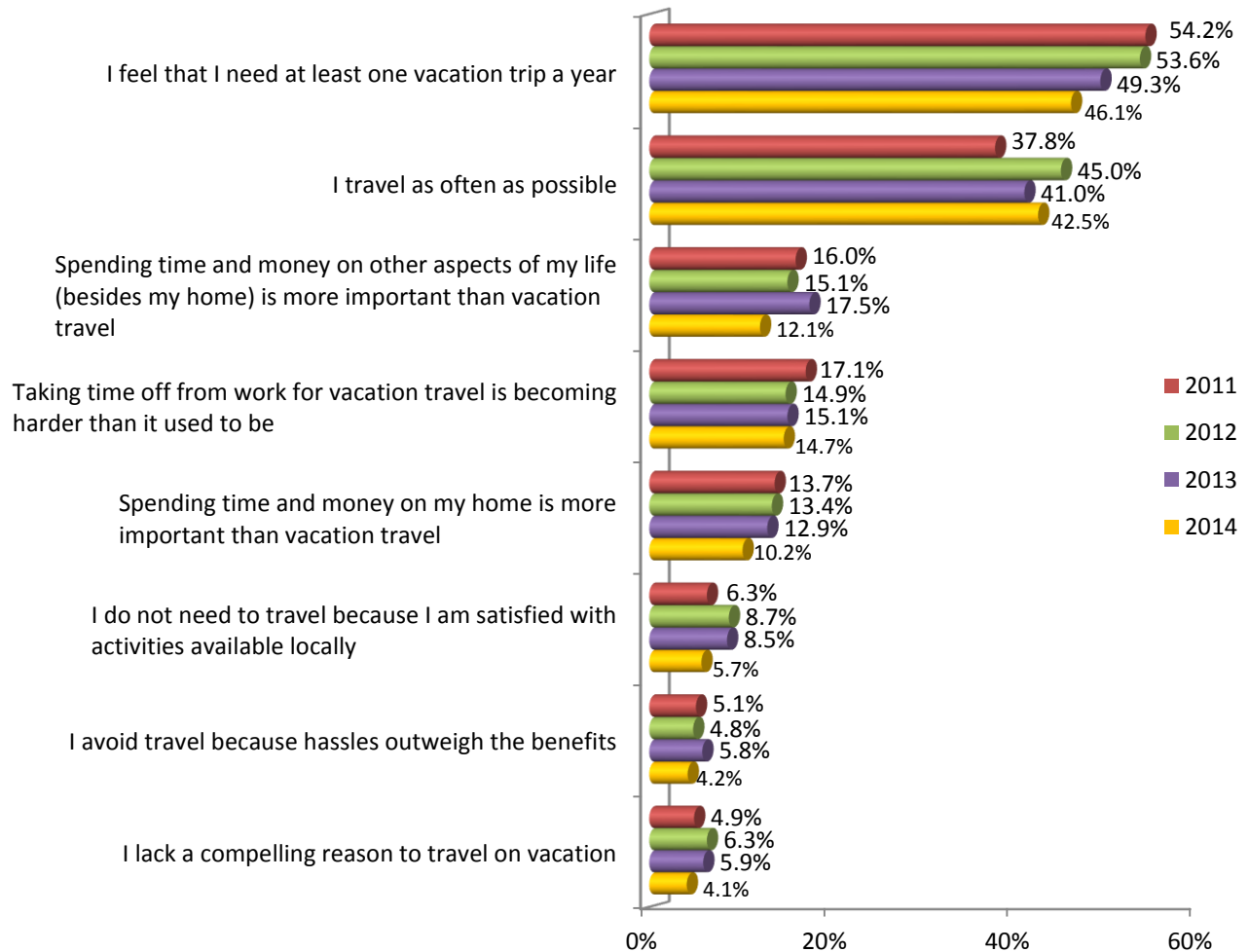


How Often Do You Take Leisure Trips with your Pets?



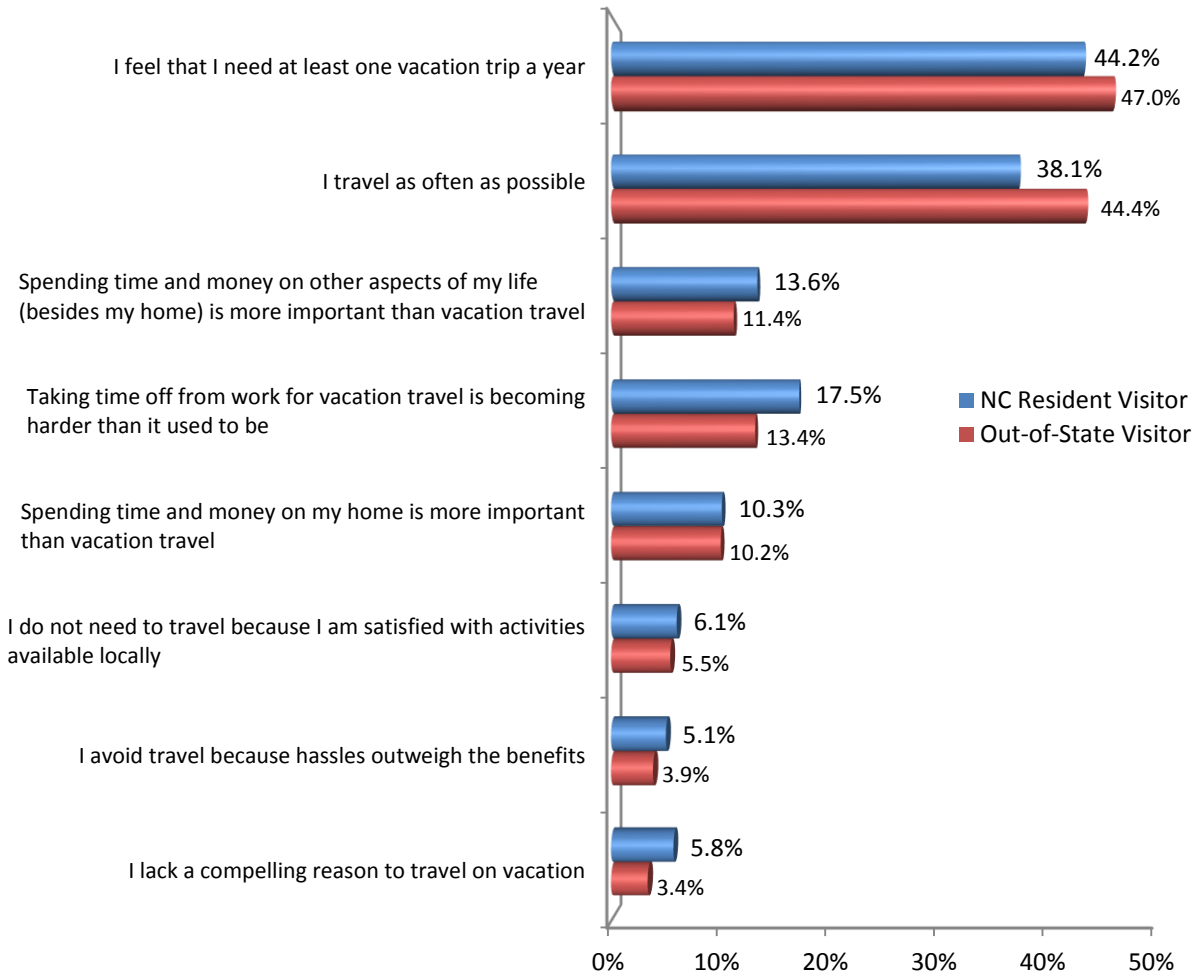
Nearly half of North Carolina overnight visitors feel they need at least one vacation a year, down from 2013. Over a third indicate that they travel as often as possible.

Current Feelings Concerning Vacation Travel



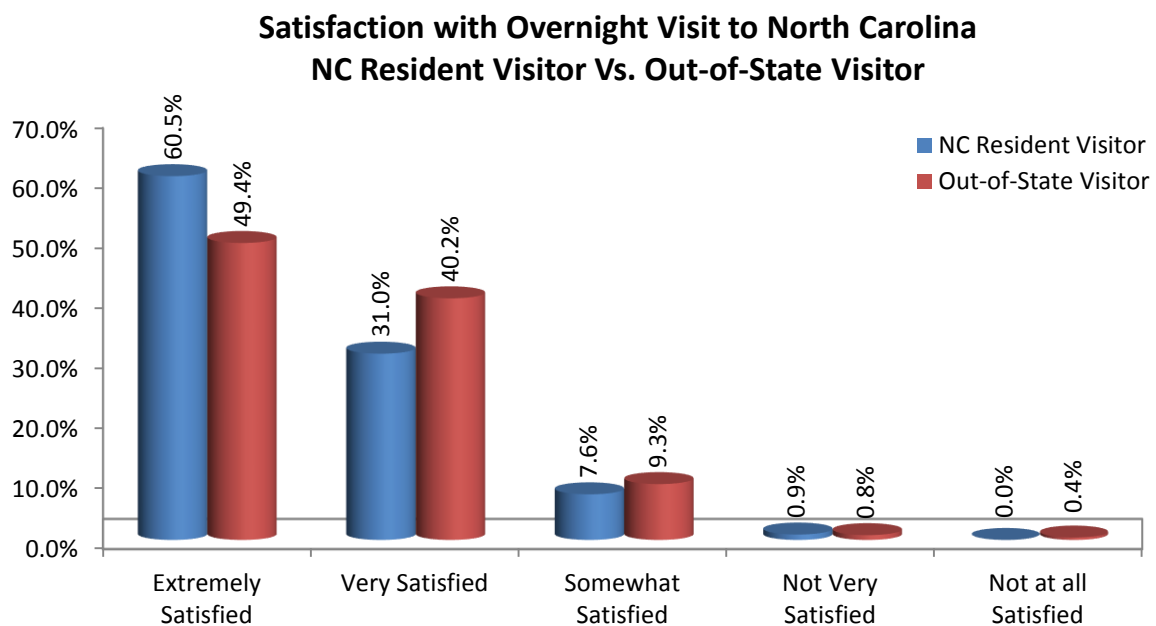
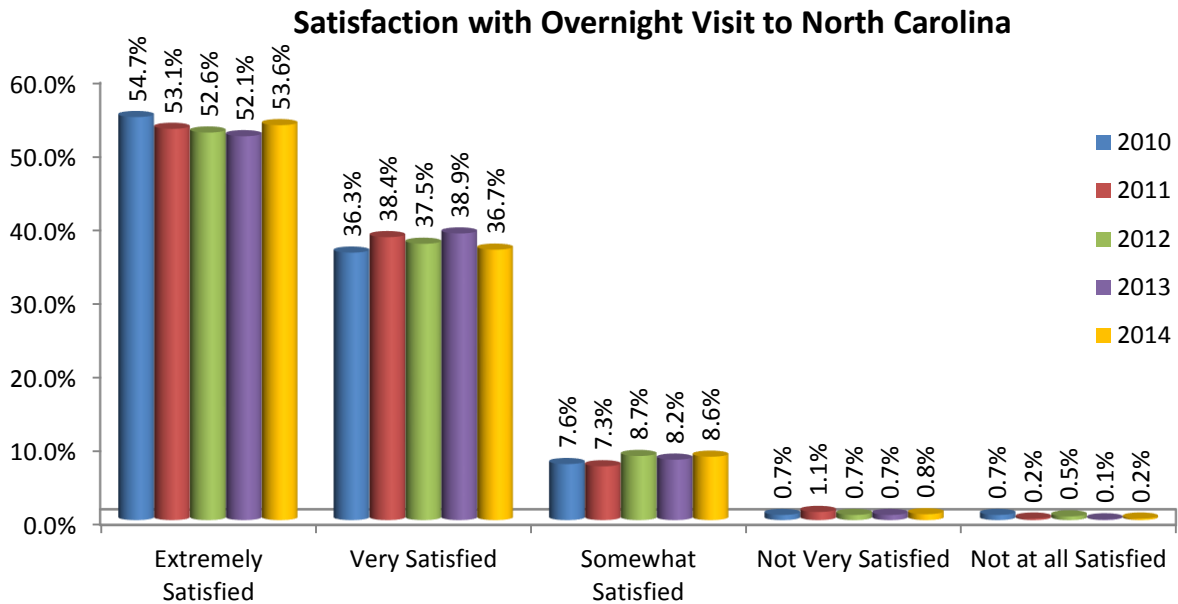
North Carolina out-of-state visitors are more likely to report that they travel as often as possible than resident visitors. However, resident visitors more often note that it is harder to take time off work than it used to be.

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



Satisfaction with Overnight Visits to North Carolina

Ninety percent of overnight visitors to North Carolina in 2014 were either very or extremely satisfied with their visit, and the proportion of those visitors who were extremely satisfied increased from fifty-two percent to nearly fifty-four percent. Both resident and out-of-state visitors express high satisfaction with their visits to and within North Carolina.



2014 North Carolina Daytrip Visitor Profile

Summary

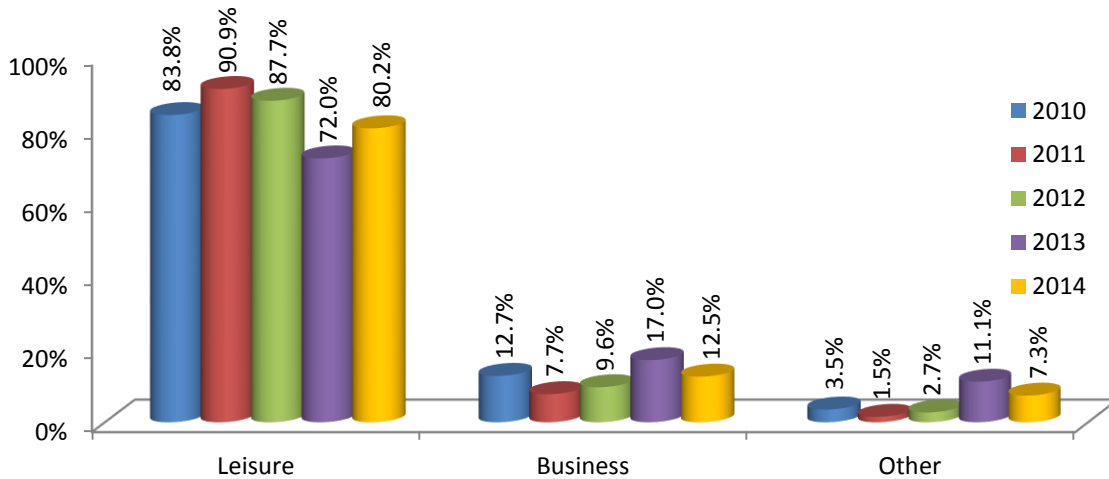
- ◆ A daytripper is defined as a visitor who did not spend any nights away from home, but traveled at least 50 miles one-way from home. In 2014, approximately 11.1 million daytrips were taken in North Carolina. North Carolina ranked #7 in the US in terms of daytrip visitation.
- ◆ Eighty percent of all daytrippers visited North Carolina for pleasure purposes, while nearly thirteen percent of visitors came to conduct business (includes meeting/convention). The remaining respondents indicated an “other” reason for visiting the state.
- ◆ The spring (March-May) was the most popular season for day travel to North Carolina, with twenty-seven percent of all 2014 daytrippers, followed by summer (June - August) with twenty-six percent, fall (September - November) with twenty-four percent and winter (December-February) with twenty-three percent. June was the single largest month for day travel to the state with more than twelve percent, followed by April with nearly eleven percent.
- ◆ The average travel party size for daytrip visitor parties to North Carolina was 1.9 people. Twenty-six 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 2014, the average household trip expenditure for daytrip parties to the state was approximately \$191 per visit, up from \$177 in 2013.
- ◆ The top states of origin of *daytrippers* to North Carolina were in-state residents (52.0%), and the nearby states of South Carolina (9.9%), Virginia (7.0%), Florida (5.7%), Georgia (4.6%) and Tennessee (4.2%).
- ◆ Forty-eight percent of the households that traveled to North Carolina on a daytrip in 2014 had a household income over \$50,000.
- ◆ In 2014, Raleigh/Durham/Fayetteville (23.9%) was the top advertising market of origin for *daytrippers* to the state, followed by Charlotte (20.1%), Greensboro/High Point/Winston Salem (15.7%), Greenville-Spartanburg-Asheville (9.0%), and Greenville-New Bern-Washington (8.7%).

North Carolina Daytrip Visitor Profile

Main Purpose of Visit

In 2014, eighty 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 dropped from seventeen percent in 2013 to just over twelve percent in 2014.

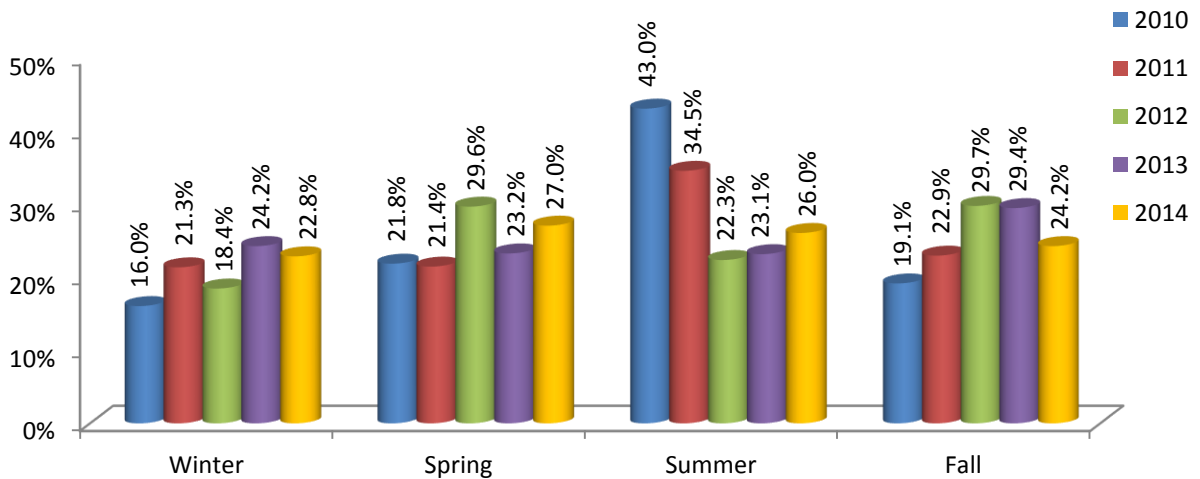
Primary Purpose of Daytrip to North Carolina



Travel Volume by Season

Daytrip travel to and within North Carolina has become much more consistent throughout the year over the last several years. In 2014, spring and summer held slight leads in terms of proportion of annual daytrippers, but were followed very closely by fall and winter.

Daytrip Travel by Season to North Carolina



Travel Party Size

The average travel party size for North Carolina daytrippers in 2014 was 1.9 people. That figure has been consistent over the last several years.

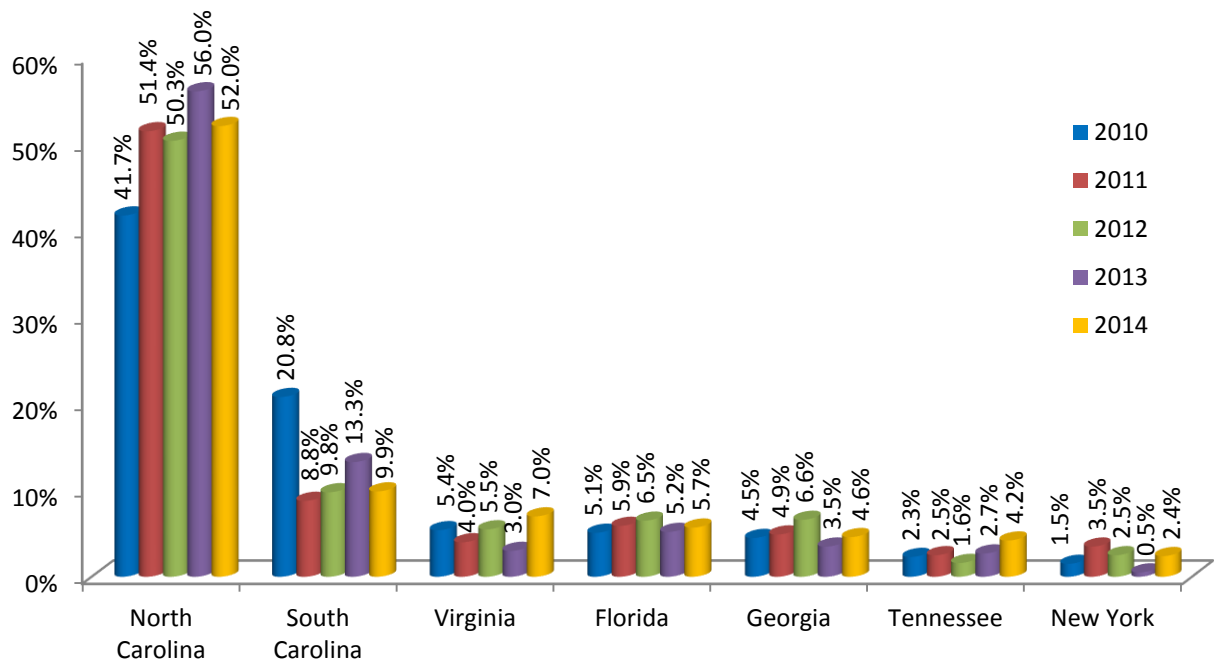
Children on Trip

Twenty-six percent of daytrip parties to North Carolina included children. Among those who traveled with children, the average number of children on trips was 1.7.

Origin of Visitors

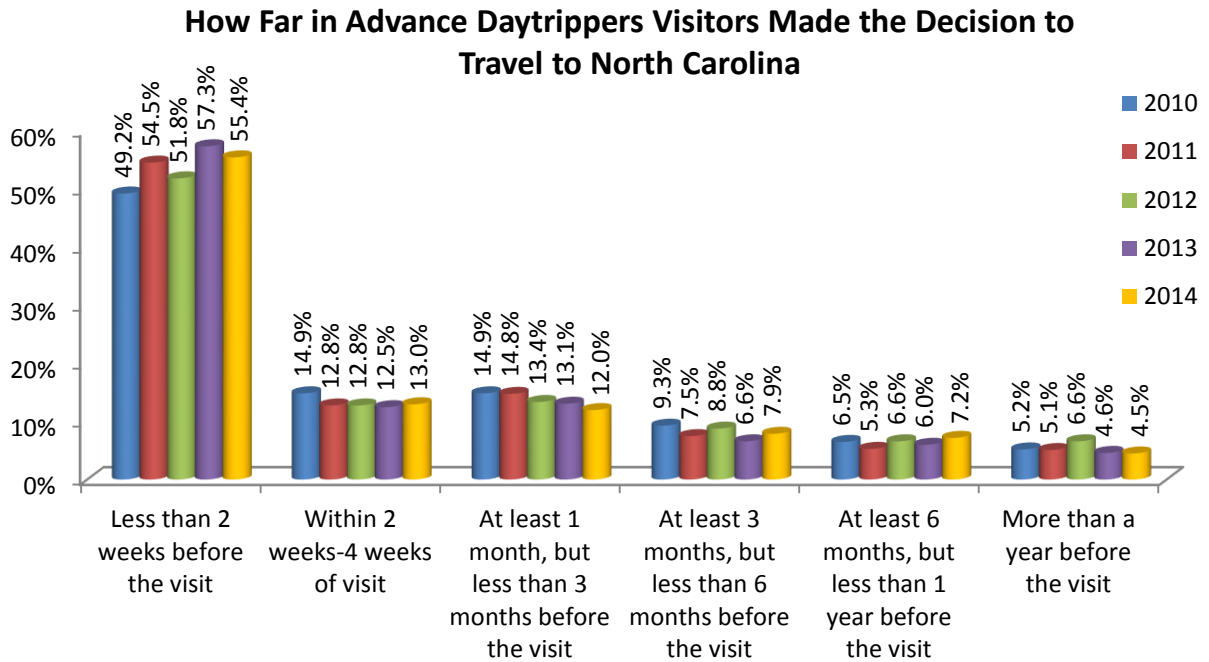
As expected, the top states of origin for North Carolina daytrippers were residents and those from nearby states; North Carolina (52.0%), South Carolina (9.9%), Virginia (7.0%) and Florida (5.7%). Florida was actually ahead of Georgia (4.6%) and Tennessee (4.2%) in terms of proportion of overall daytrippers to the state.

Top States of Origin of Daytrippers to North Carolina

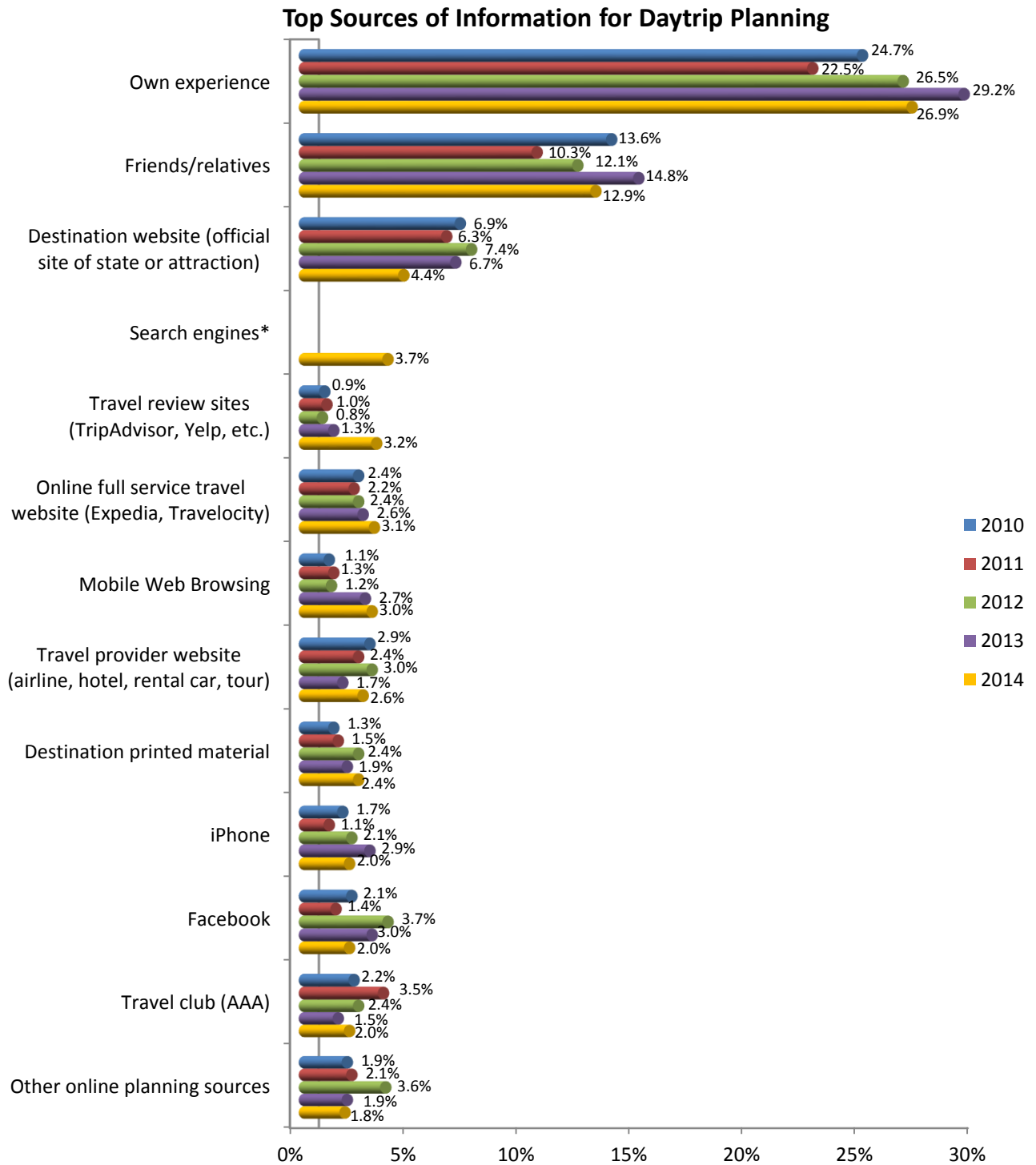


Trip Planning

Not surprisingly, daytrippers to and within North Carolina planned their visits within a shorter timeframe than overnighters. More than half of 2014 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 and destination websites. Search engines and travel review sites ranked fourth and fifth in terms of daytrip planning.

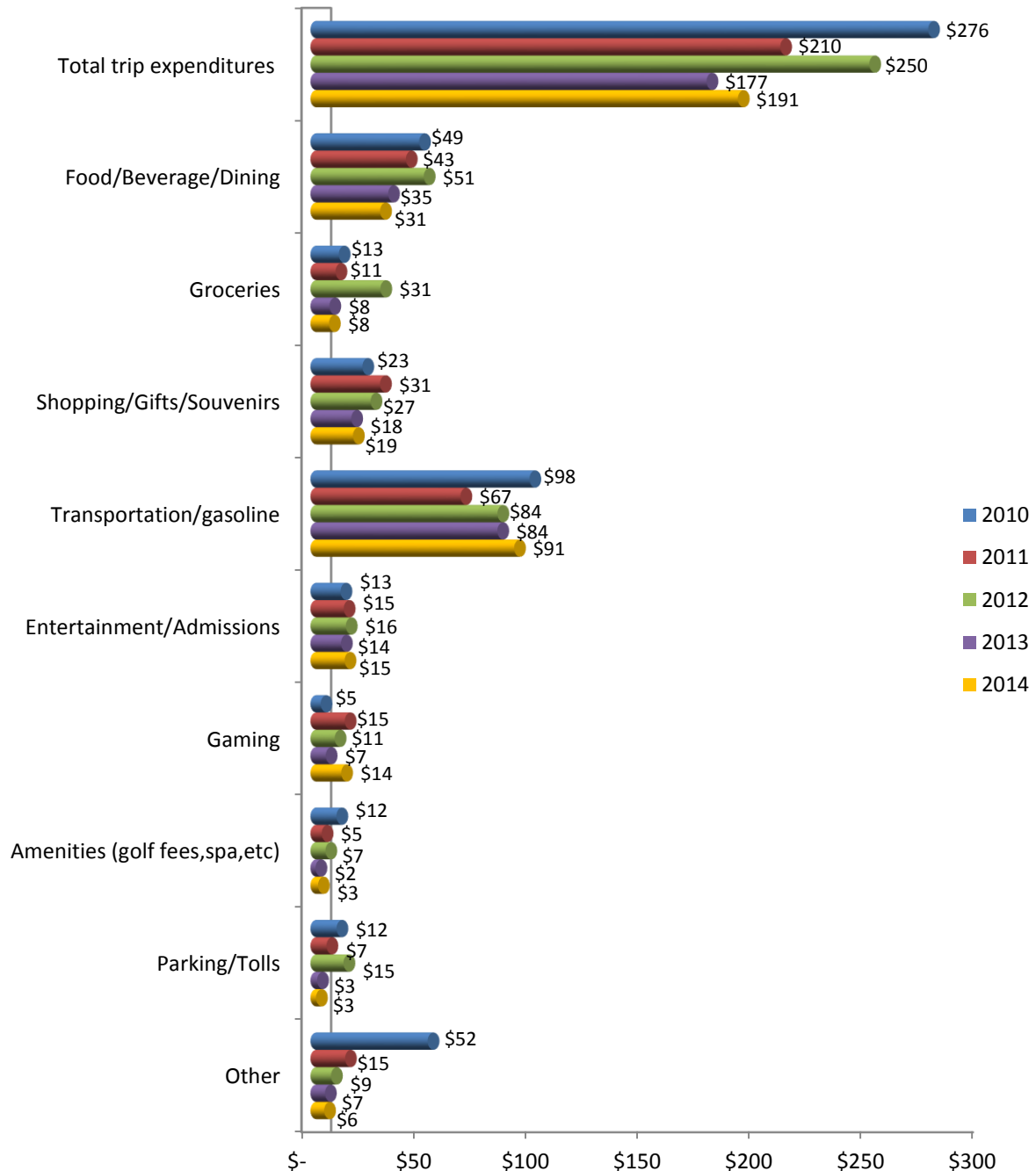


*New category

Expenditures by North Carolina Daytrippers

The average daytrip visitor party spending in the state was \$191, up from \$177 in 2013. Most of the increase came in transportation and gaming expenditures by daytrippers.

Average Spending by Daytrip Visitor Parties to North Carolina



Activities

More than twenty percent (20.9%) of the daytrippers to North Carolina in 2014 visited relatives while on a daytrip in the state. Nearly twelve percent participated in shopping, while seven percent participated in fine dining (up from 4 percent in 2013). ***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	2010	2011	2012	2013	2014
Visiting Relatives	17.5%	20.0%	16.9%	20.0%	20.9%
Shopping	11.3%	10.8%	11.6%	10.0%	11.9%
Fine Dining	5.4%	5.1%	7.1%	4.2%	7.2%
Rural Sightseeing	8.2%	9.7%	12.9%	8.9%	6.9%
Visiting Friends	8.5%	7.9%	7.8%	9.1%	6.6%
State/National Park	5.7%	4.3%	6.5%	5.5%	5.4%
Beach	4.9%	5.3%	10.5%	3.0%	4.1%
Casino/Gaming	1.7%	3.2%	2.9%	2.8%	3.5%
Youth/amateur/collegiate sporting events	2.5%	1.2%	1.3%	0.2%	3.1%
Urban Sightseeing	3.3%	5.3%	4.3%	3.8%	3.0%
Historic Sites/Churches	2.6%	3.8%	4.2%	4.3%	2.8%
Museums	2.5%	2.7%	4.8%	2.3%	2.3%
Other Nature (photography, rockhound, etc.)*					2.1%
Wildlife Viewing	3.8%	3.2%	4.5%	3.0%	1.9%
Hiking/Backpacking	3.1%	2.7%	2.4%	1.2%	1.9%
Gardens	0.6%	1.8%	2.8%	1.0%	1.9%
Old Homes/Mansions	1.8%	1.5%	2.2%	1.2%	1.8%
Theme Park	1.5%	1.2%	0.7%	0.7%	1.7%
Nature Travel/Ecotouring	2.6%	2.6%	1.6%	2.6%	1.6%
Zoos/Aquariums/Aviaries	2.3%	1.3%	1.0%	0.7%	1.6%
Nightclubs/Dancing	0.9%	1.2%	1.1%	0.5%	1.5%
Art Galleries	1.3%	0.9%	1.4%	1.7%	1.2%
Local/folk arts/crafts*					1.1%
Symphony/Opera/Concert	0.4%	0.4%	1.1%	1.1%	0.9%
Fishing (fresh or saltwater)	1.3%	0.5%	2.6%	0.5%	0.9%
Area where a TV show or movie filmed				0.3%	0.8%
Bird Watching	1.1%	1.7%	1.0%	1.6%	0.8%
Golf	0.6%	0.8%	1.1%	0.5%	0.7%
Wine Tasting/Winery Tour	1.1%	0.6%	1.4%	0.9%	0.7%
Craft breweries				0.1%	0.7%
Motor sports	1.0%	0.9%	1.3%	0.8%	0.5%
Theater/Drama	0.2%	0.7%	0.8%	1.0%	0.5%
Music Theater	0.8%	0.7%	0.3%	1.2%	0.5%
Special Events/Festivals	1.0%	1.8%	0.8%	1.2%	0.5%

*New category

Demographic Profile of North Carolina Daytrip Visitors

More than half of North Carolina daytrippers (56%) of the visitors are married and just over a quarter of the region's visitors are divorced, widowed or separated (27%).

The largest proportion of North Carolina daytrippers classify themselves as white (85.6%), and twelve percent classify themselves as black/African American.

Over half (56.9%) of North Carolina daytrippers have a household head with a college degree or higher. The average daytripper is 48 years old.

The average North Carolina daytripper has 11 vacation days each year.

One-quarter (25.5%) of the daytrip visitor parties that traveled to North Carolina in 2014 had a household income \$75,000 or over. Seven percent had a household income of over \$125,000. The average household income of a daytrip visitor party in 2014 was \$58,000.

More than sixty percent (61.7%) of daytrip visitor parties reported that the head of household is employed, while twenty percent are retired. The remainder reported "not employed" as work status.

The average household size of a North Carolina daytrip visitor party in 2014 was 2.5.

2014 Top Advertising Markets

In 2014, the top advertising markets sending daytrippers to **North Carolina** were Raleigh-Durham-Fayetteville (23.9%), Charlotte (20.1%), Greensboro-Winston-Salem-High Point (15.7%), Greenville-Spartanburg-Asheville (9.0%), and Greenville-New Bern-Washington (8.7%). Advertising markets correspond with Nielsen's Designated Market Areas (DMAs).

Top Advertising Markets of Origin for North Carolina *Daytrippers*

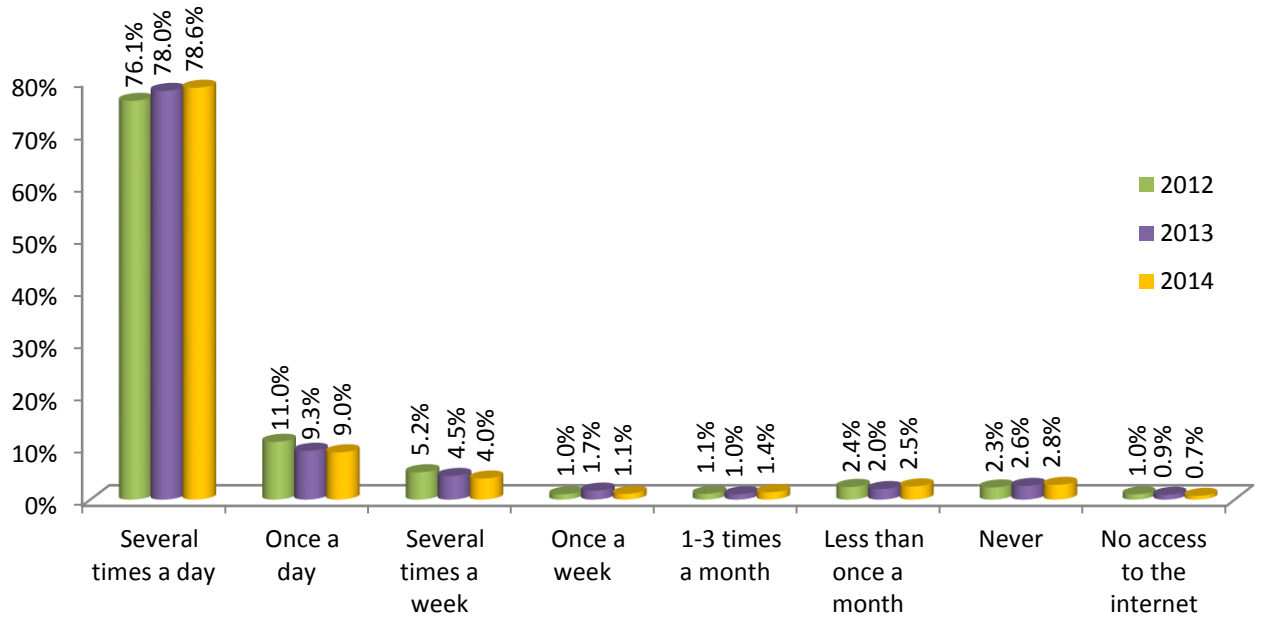
DMA of Origin	2010 Percentage of Total Daytrippers	2011 Percentage of Total Daytrippers	2012 Percentage of Total Daytrippers	2013 Percentage of Total Daytrippers	2014 Percentage of Total Daytrippers
Raleigh-Durham (Fayetteville)	18.6%	19.0%	22.6%	21.9%	23.9%
Charlotte	16.0%	20.5%	16.4%	22.1%	20.1%
Greensboro-High Point-Winston Salem	15.4%	13.6%	19.0%	15.8%	15.7%
Greenville-Spartanburg-Asheville-Anderson	11.9%	12.4%	13.3%	10.4%	9.0%
Greenville-New Bern-Washington	10.2%	9.2%	7.7%	9.3%	8.7%
Roanoke-Lynchburg	2.5%	1.8%	2.2%	1.6%	4.0%
Wilmington	2.8%	5.1%	3.1%	3.8%	3.0%
Atlanta	1.8%	2.9%	3.6%	2.3%	2.6%
Columbia	2.3%	1.9%	1.8%	2.5%	2.3%
Myrtle Beach-Florence	5.6%	1.4%	1.2%	0.4%	1.6%
Tri-Cities, TN-VA	2.1%	1.4%	0.9%	1.7%	1.2%
Richmond-Petersburg	1.0%	0.1%	0.4%	0.6%	1.2%
Norfolk-Portsmouth-Newport News	3.9%	4.6%	3.4%	2.2%	1.1%

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

Importance of Internet

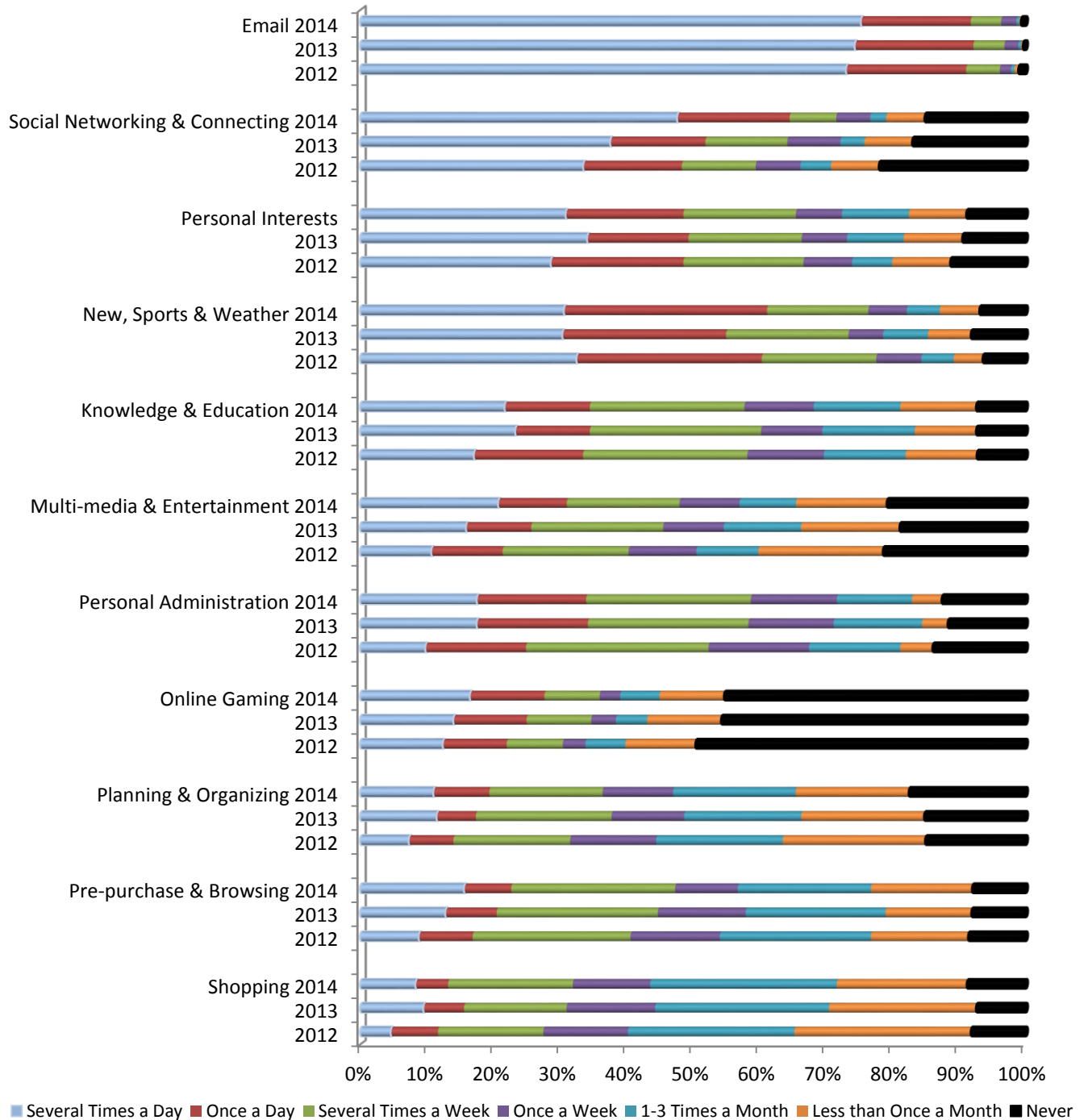
More than three-quarters of North Carolina daytrippers indicate that they access the Internet at least several times daily. Less than one percent does not have Internet access.

Frequency of Internet Use by 2014 North Carolina Daytrippers



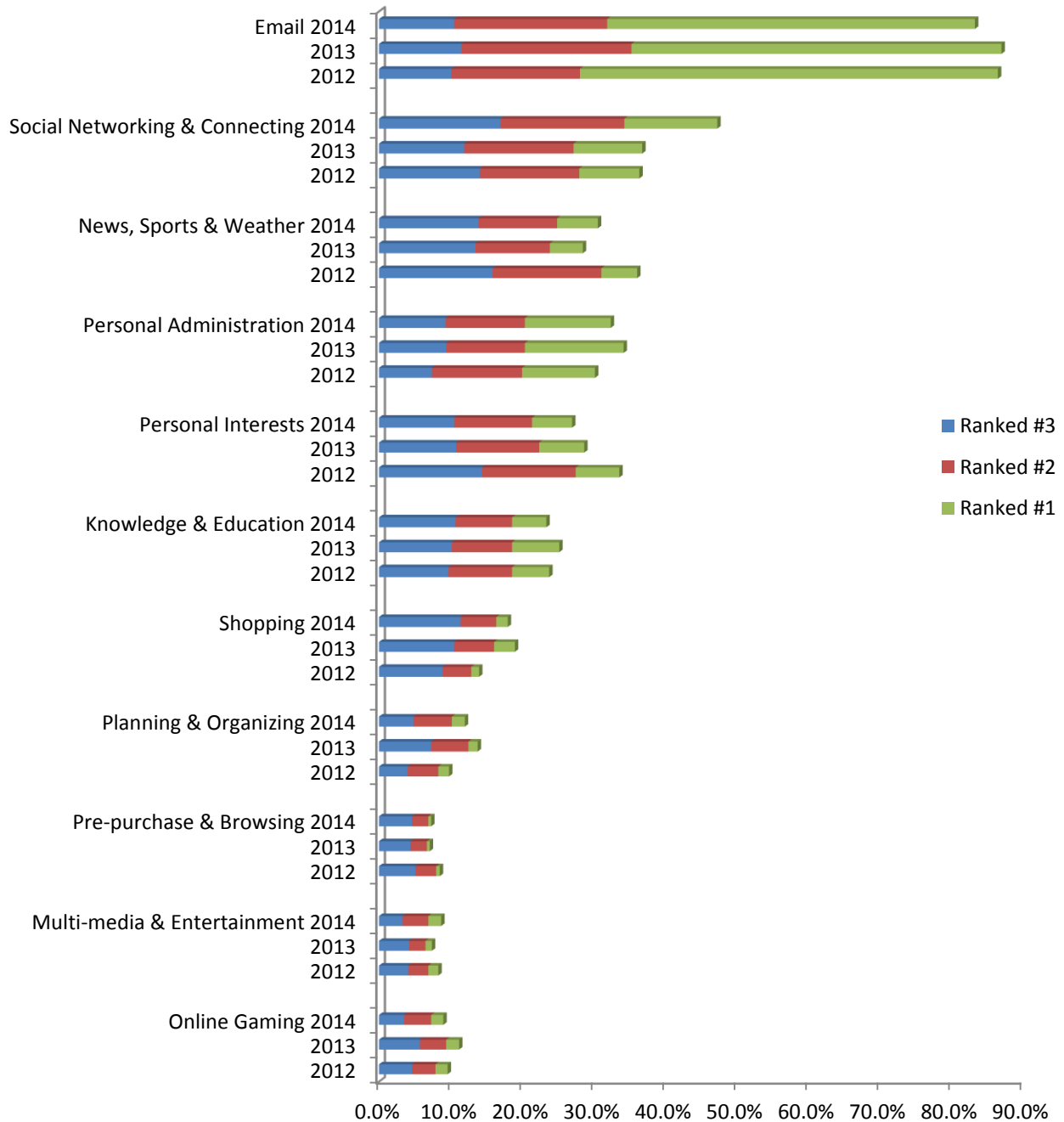
Visitors use the Internet for a variety of purposes, some more often than others. In 2014, three-fourths of daytrippers reported using email several times a day, while nearly one-half use social media several times a day. This proportion has grown from less than thirty-four percent in 2012.

Frequency of Online Activities of North Carolina Daytrippers



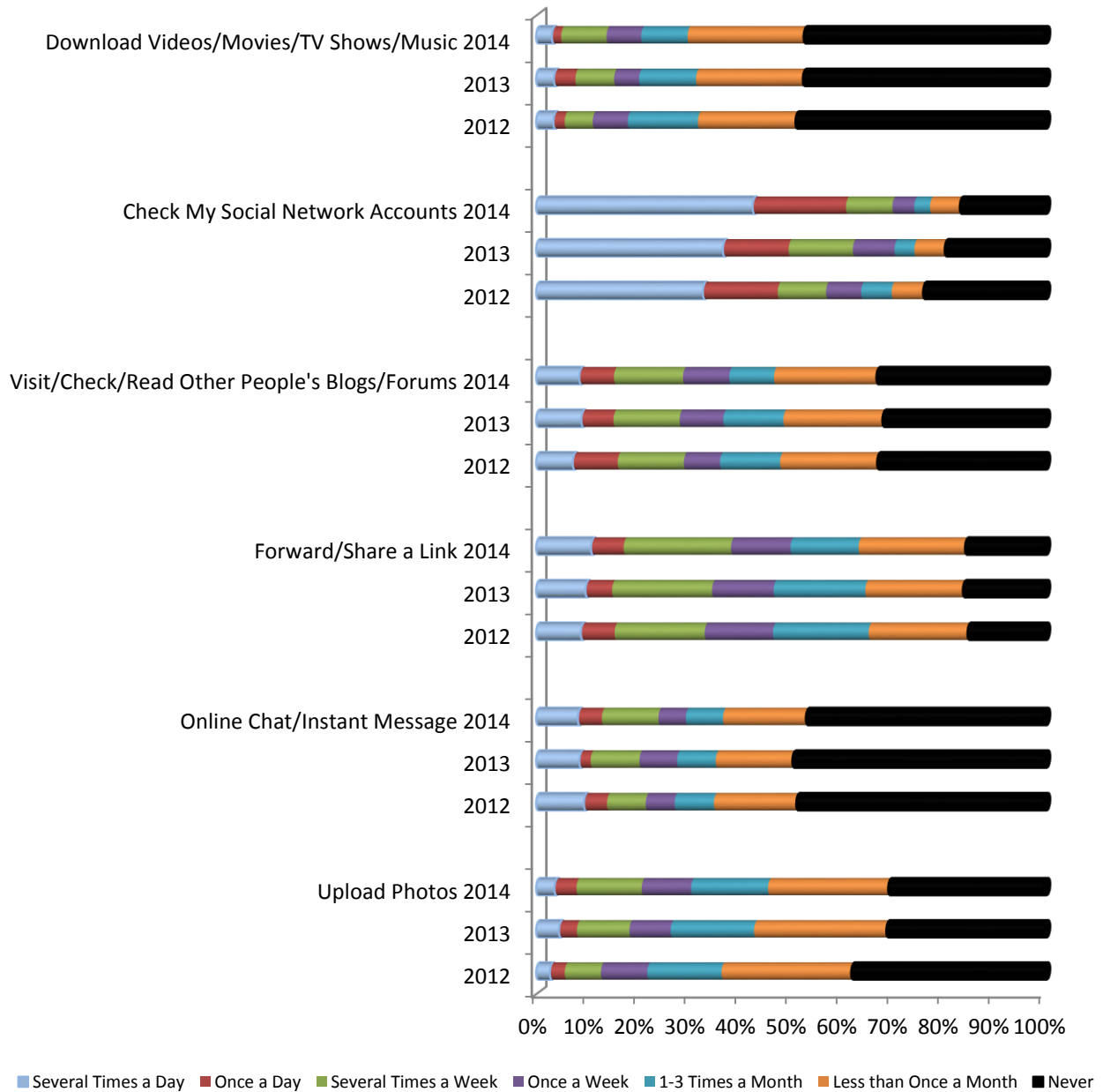
North Carolina day visitors use the Internet for numerous purposes, but email (83.3%) outweighed all other uses by far. Over half (51.4%) ranked email as their top use of the Internet. The importance of social networking and connecting to daytrippers increased significantly from 2013 to 2014.

Online Activities Ranked by Importance to 2014 North Carolina Daytrippers



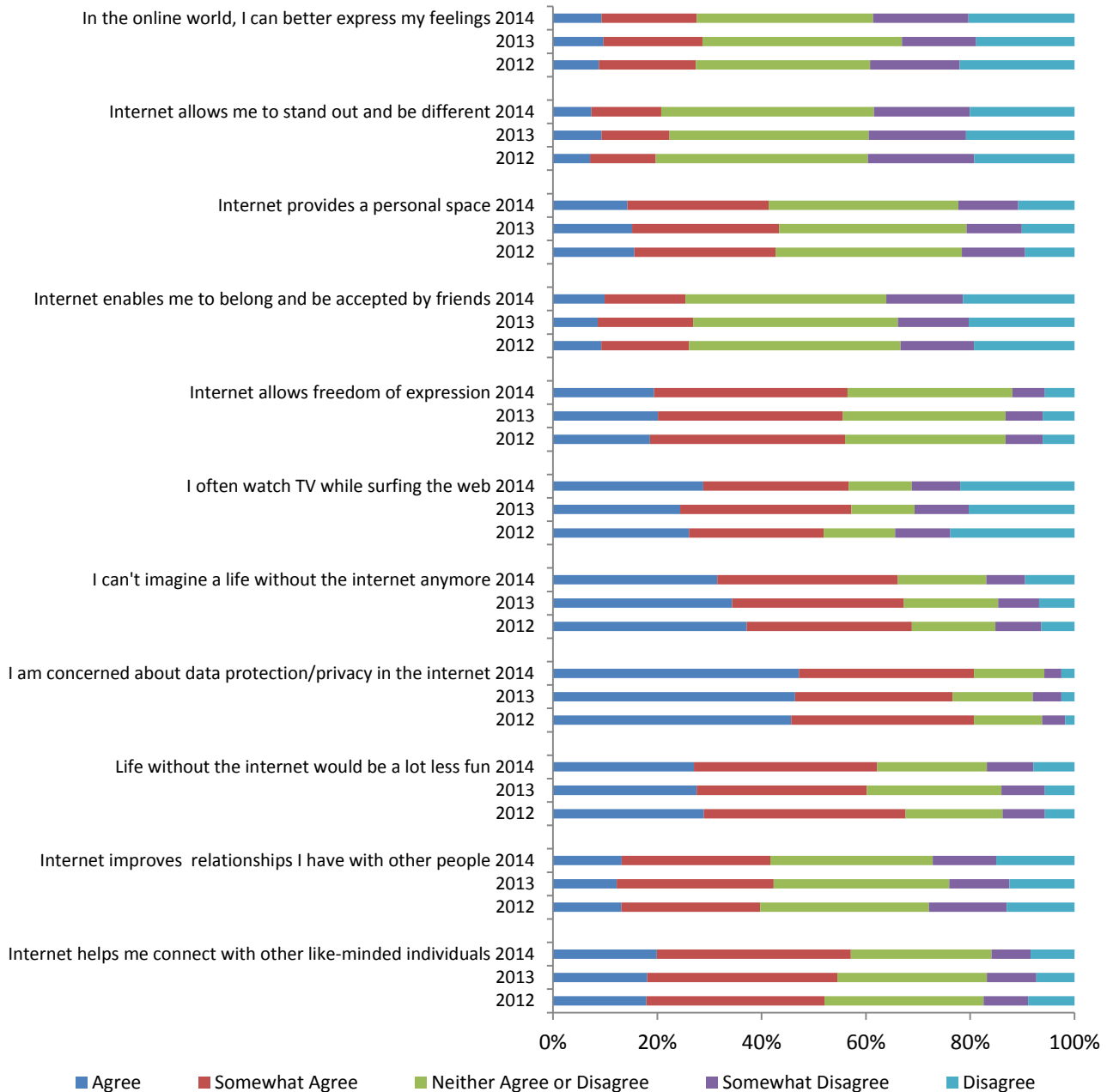
Other frequent online activities of daytrippers to and within the state include checking social media accounts, forwarding links and reading blogs.

Other Online Activities of North Carolina Daytrippers



More than eighty percent of daytrippers to North Carolina are concerned about data protection/privacy on the Internet, though two-thirds of respondents strongly agree or agree that they can't imagine life without it anymore. More than half also (62%) strongly agree or agree that life without the Internet would be a lot less fun and that it helps them connect with other like-minded people (57%).

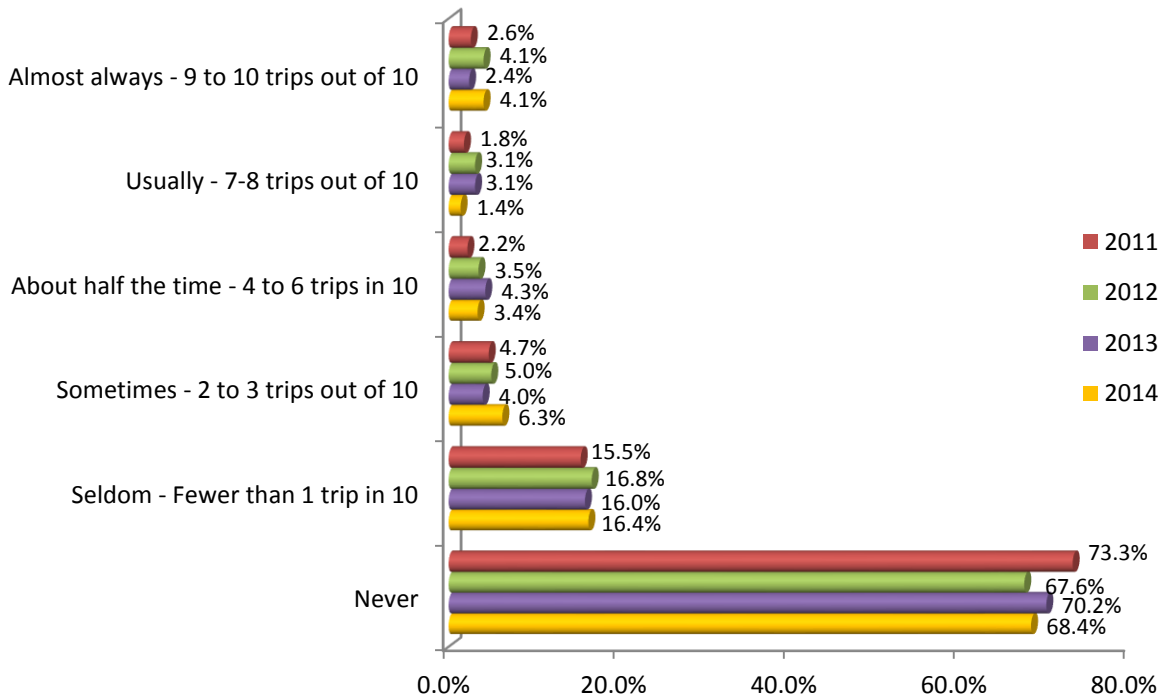
Personal Views of the Internet of North Carolina Daytrippers



Vacation Attitudes

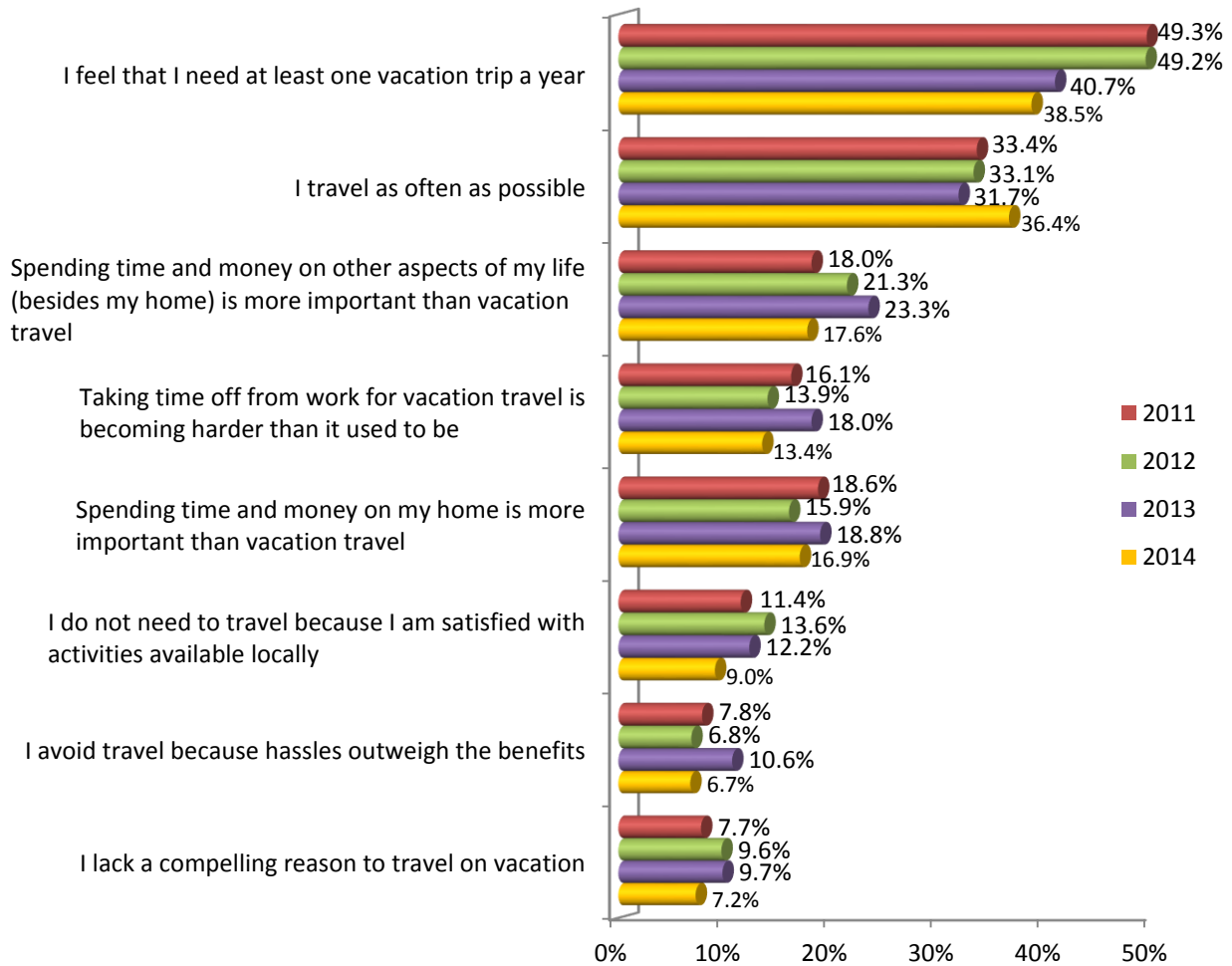
The majority of daytrippers to North Carolina travel without pets, though that proportion has decreased over the last several years.

How Often Do You Take Leisure Trips with your Pets?



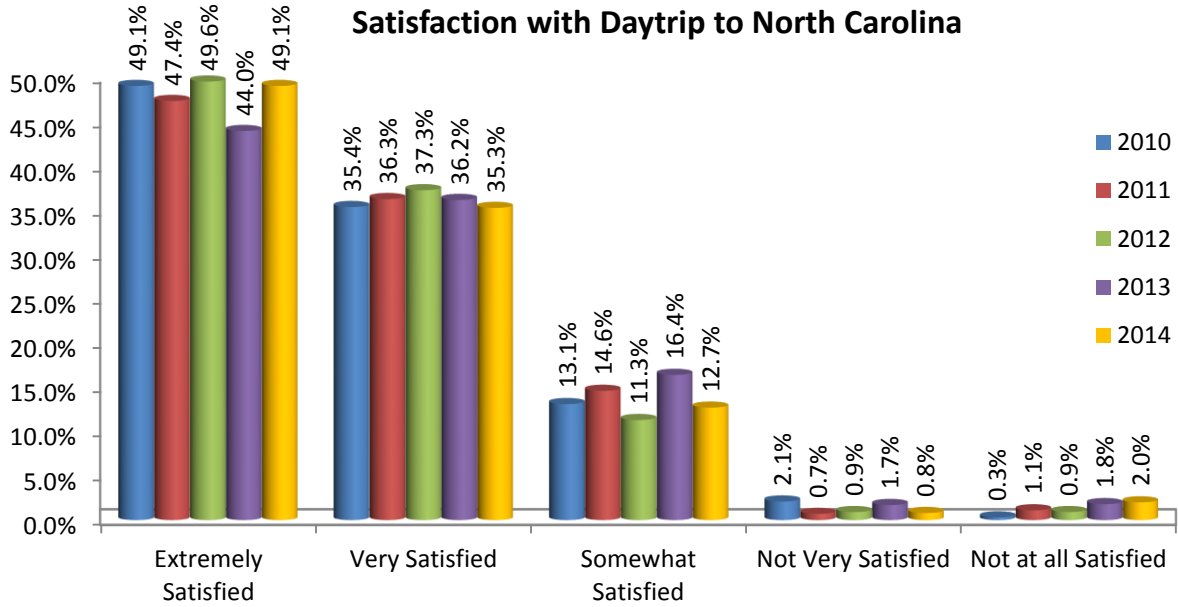
Nearly forty percent of North Carolina daytrippers report that they need at least one vacation a year and that they travel as often as possible. Less than seven percent indicate that they avoid travel due to the hassles involved with traveling.

Current Feelings Concerning Vacation Travel



Satisfaction with Daytrips to North Carolina

Eighty-four percent of daytrippers to North Carolina in 2014 were either very or extremely satisfied with their daytrip to or within the state. Less than three percent were not satisfied.

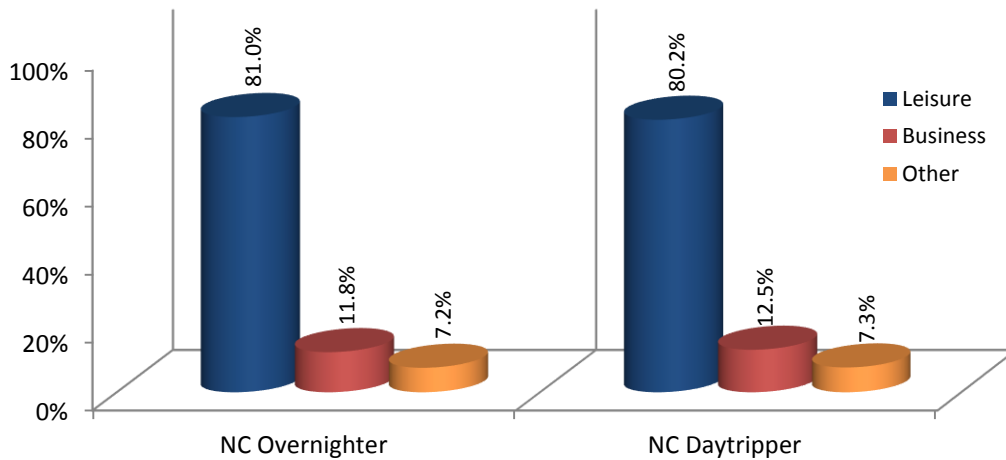


2014 Overnight vs. Daytrip Comparison

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

Leisure is the predominant reason for travel to North Carolina for both overnights and daytrippers, with little noticeable differences seen in 2014.

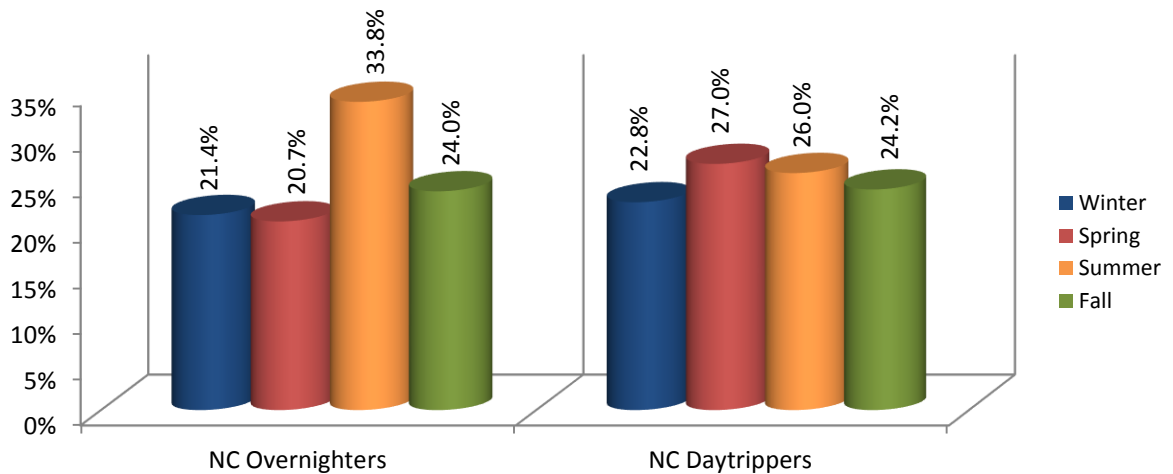
2014 Primary Purpose of Trip



Travel Volume by Season

The seasonal distribution of visitors helps understand the flow of travelers through the state. Overnights were more likely to visit during the summer, while daytrip seasonal distribution is more consistent throughout the year.

2014 Season of Travel



2014 North Carolina Overnight Vs. Daytrip

The average party size for overnight visitors and daytrippers was the same in 2014. Daytrip visitor parties were slightly more likely to include children in the party.

2014 Travel Party Size

North Carolina Overnights	North Carolina Daytrippers
1.9 people	1.9 people

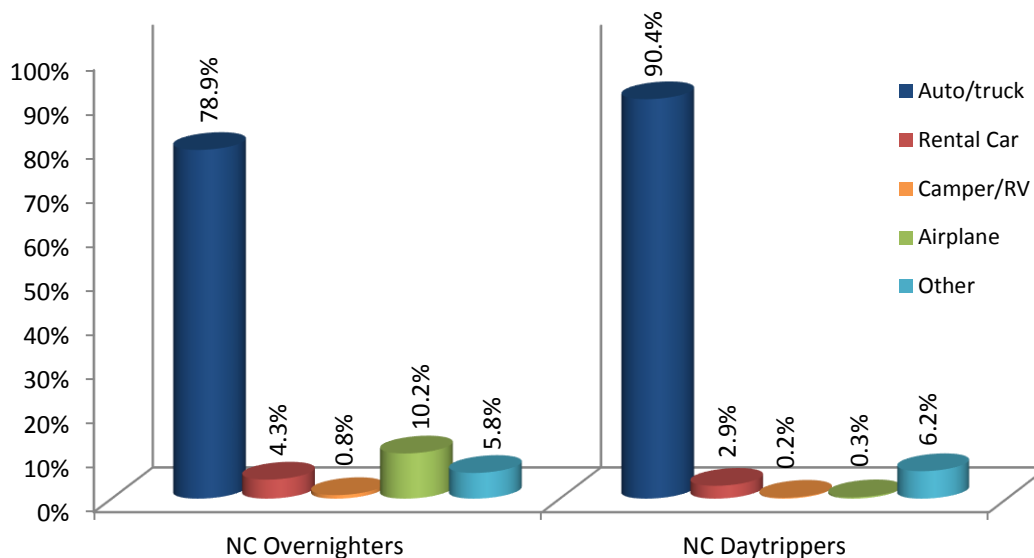
2014 Children on Trip

North Carolina Overnights	North Carolina Daytrippers
22.5%	25.6%

Mode of Transportation

Not surprisingly, auto transportation was the primary use of travel by all of North Carolina visitors, both overnights and daytrippers. Ten percent of overnights used air transportation.

2014 Primary Transportation by Overnight Visitors



Origin of Visitors

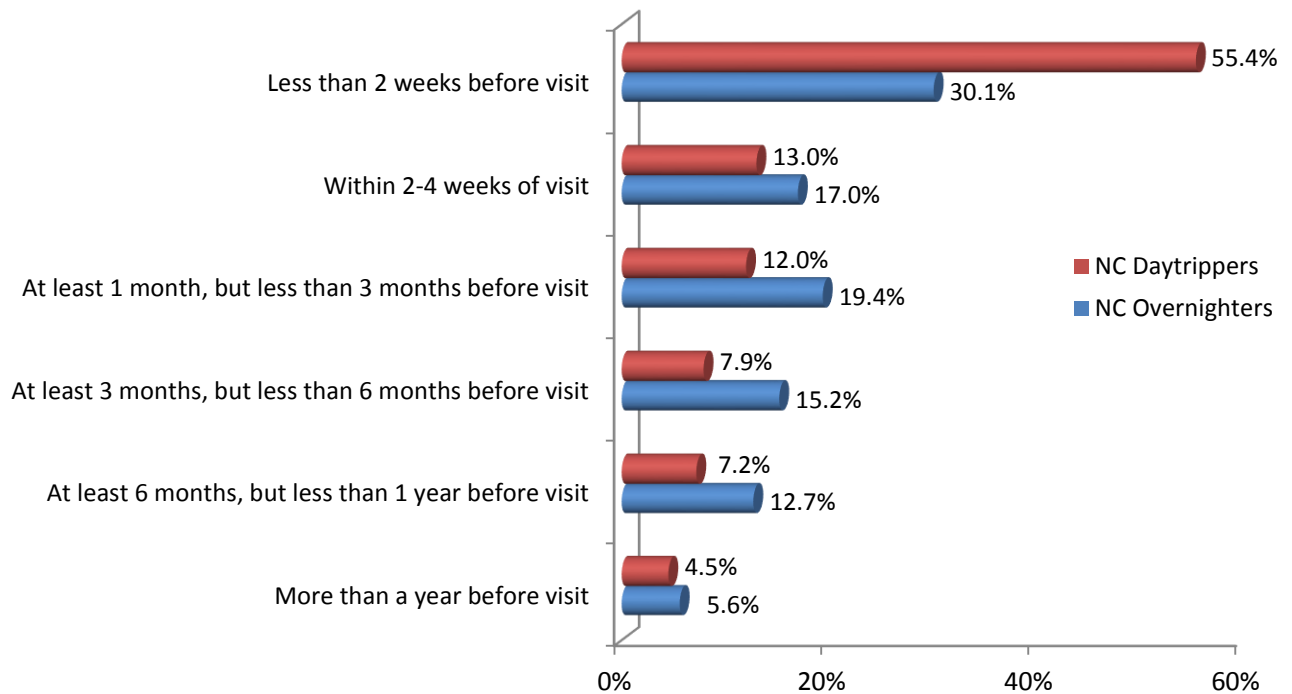
North Carolina is the top state of origin for both overnights and daytrippers to the state. In-state residents comprise thirty percent of the state’s overnight visitors and just over one-half of the state’s daytrippers.

NC Overnights	NC Daytrippers
North Carolina (30.0%)	North Carolina (52.0%)
South Carolina (9.2%)	South Carolina (9.9%)
Florida (8.1%)	Virginia (7.0%)
Virginia (7.9%)	Florida (5.7%)
Georgia (7.3%)	Georgia (4.6%)
New York (4.3%)	Tennessee (4.2%)
Pennsylvania (3.0%)	New York (2.4%)
Tennessee (3.1%)	Ohio (2.1%)
Ohio (2.4%)	New Jersey (1.2%)
Maryland (2.4%)	Louisiana (1.2%)

Trip Planning

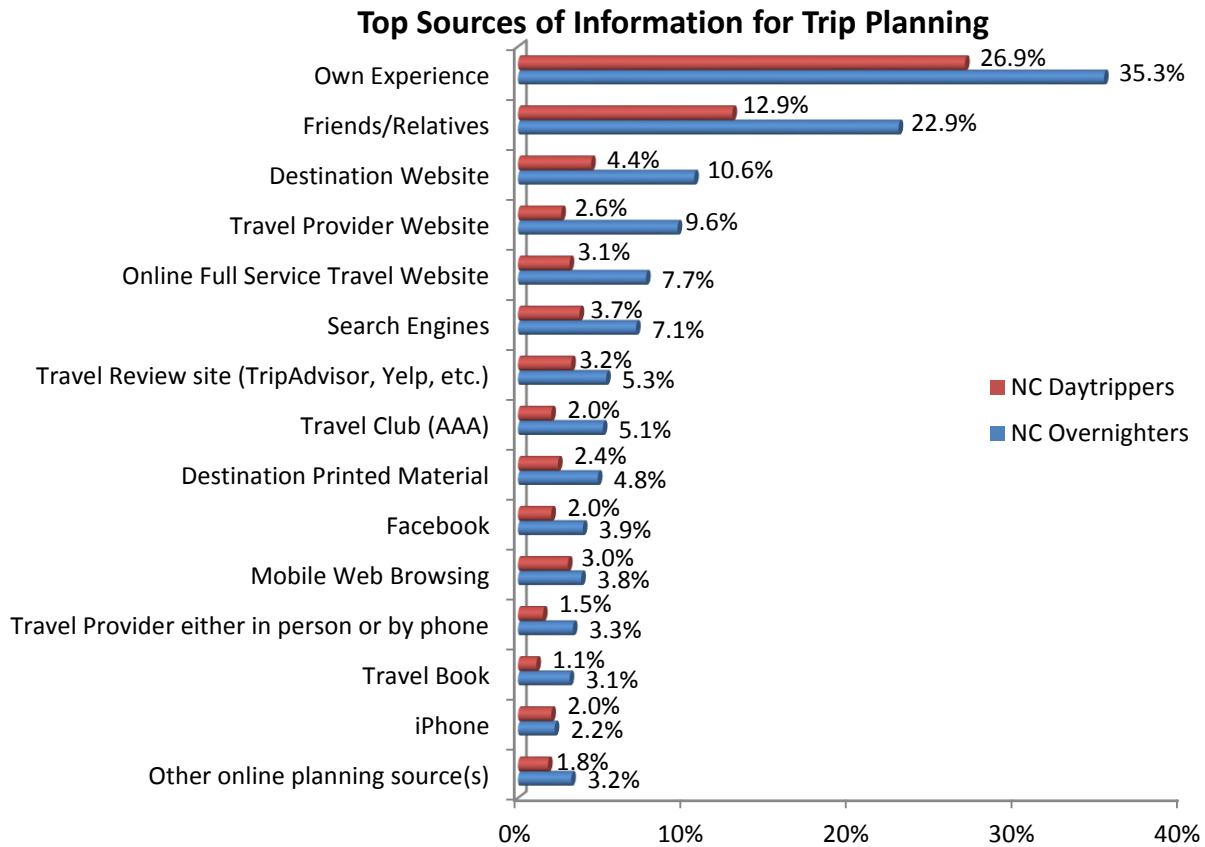
Daytrippers, not surprisingly, made the decision to visit North Carolina in a shorter time frame than overnights. Over half made the decision less than 2 weeks prior to the visit.

How Far in Advance Decision Was Made to Visit North Carolina



2014 North Carolina Overnight Vs. Daytrip

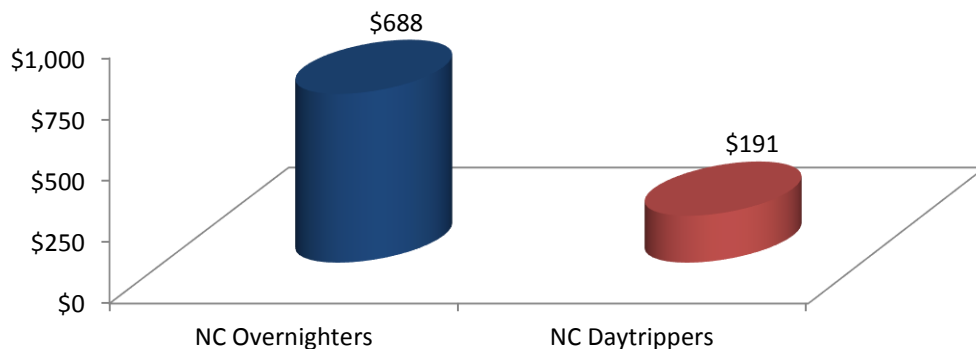
In trip planning, overnighters to North Carolina relied on a larger variety of sources than daytrippers. In particular, they used their own experience, friends/relatives and websites more than daytrippers.



Trip Expenditures

On average, 2014 overnight visitor parties to and within North Carolina spent nearly \$500 more per trip than daytrippers.

Average Total Trip Spending by Overnight & Daytrip Visitor Parties



Activities

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

NC Overnighers	NC Daytrippers
Visiting relatives (31.6%)	Visiting relatives (20.9%)
Shopping (20.5%)	Shopping (11.9%)
Beach (17.8%)	Fine dining (7.2%)
Visiting friends (17.0%)	Rural sightseeing (6.9%)
Rural sightseeing (12.8%)	Visiting friends (6.6%)
Fine dining (12.2%)	State/National Park (5.4%)
State/National Park (11.2%)	Beach (4.1%)
Historic sites/churches (9.3%)	Casino/gaming (3.5%)
Wildlife viewing (7.3%)	Sports events-Youth/Amateur/Collegiate/Other (3.1%)
Museums (7.2%)	Urban sightseeing (3.0%)
Urban sightseeing (6.8%)	Historic sites/churches (2.8%)
Old homes/mansions (5.6%)	Museums (2.3%)
Hiking/ Backpacking/ Canyoneering (4.4%)	Other nature (photography, rockhound, etc) (2.1%)
Art galleries (3.9%)	Wildlife viewing (1.9%)
Nightclub/dancing (3.6%)	Hiking/ Backpacking/ Canyoneering (1.9%)
Zoos/ Aquariums/ Aviaries (3.6%)	Gardens (1.9%)
Local/folk arts/crafts (3.4%)	Old homes/mansions (1.8%)
Wine tasting/winery tour (3.4%)	Theme park/ Amusement park/ Water park (1.7%)
Fishing (3.3%)	Zoos/ Aquariums/ Aviaries (1.6%)
Theme park/ Amusement park/ Water park (3.2%)	Nature travel/ecotouring (1.6%)
Special events/Festivals (3.2%)	Nightclub/dancing (1.5%)
Nature travel/ecotouring (3.2%)	Art galleries (1.2%)
Casino/gaming (3.0%)	Local/folk arts/crafts (1.1%)
Gardens (2.9%)	Fishing (0.9%)
Craft breweries (2.9%)	Bird watching (0.8%)
Bird watching (2.8%)	Symphony/opera/concert (0.9%)
Golf (2.5%)	Area where a TV show or movie was filmed (0.8%)
Other nature (photography, rockhound, etc) (2.2%)	Wine tasting/winery tour (0.7%)
Whitewater rafting/Kayaking/Canoeing/Paddleboarding (1.9%)	Golf (0.7%)
Sports events–Youth/Amateur/Collegiate/Other (1.9%)	Craft breweries (0.7%)
Biking/Road biking/Cycling (1.7%)	Special events/Festivals (0.5%)
Theater/drama (1.5%)	Motor sports (0.5%)
Farms/Ranches/Agri-tours (1.4%)	Theater/drama (0.5%)
Spa/Health Club (1.4%)	Musical Theater (0.5%)
Motor boat/Jet ski (1.3%)	Musical performance/show (0.3%)
Skiing/snowboarding (1.3%)	Rock/mountain climbing (0.3%)
Motor sports (1.2%)	Motor boat/Jet ski (0.2%)
Musical Theater (1.2%)	Whitewater rafting/Kayaking/Canoeing/Paddleboarding (0.2%)

Demographic Profile for 2014 North Carolina Visitors

	North Carolina Overnighters	North Carolina Daytrippers
Average age of household head	47.2 years of age	47.8 years of age
Average household size	2.4	2.5
Education of Household Head		
High school or less	13.6%	22.0%
Some college – no degree	24.2%	21.1%
Completed college	43.1%	40.3%
Post Graduate College	19.2%	16.6%
Annual Household Income		
Less than \$25,000	16.0%	27.4%
\$25,000-\$49,999	22.9%	29.5%
\$50,000-\$74,999	21.0%	19.0%
\$75,000 & over	40.1%	24.2%
Average Annual Income	\$74,400	\$58,390
Employment		
Employed	62.2%	61.7%
Retired	20.5%	20.0%
Not employed	17.3%	18.3%
Marital Status		
Married	55.1%	56.0%
Never married	22.3%	17.0%
Divorced, widowed, separated	22.6%	27.0%
Ethnicity		
White	87.0%	85.6%
Black/African American	6.7%	11.7%
Asian or Pacific Islander	1.4%	0.5%
Other	4.9%	2.2%
Average Number of Vacation Days per Year	13.6	10.9

2014 Top Advertising Markets

The top twenty-five advertising markets for the overnights and daytrippers very similar, but differences can be noted in the ranks. Raleigh-Durham, Charlotte and Greensboro-High Point-Winston Salem are the primary markets for both overnights and daytrippers. Atlanta is the fourth top market for overnights, while Greenville-Spartanburg-Asheville is the fourth top DMA for daytrippers to and within the state. It is worth noting the proportion of daytrip visitors from states such as New York and Florida who are likely visiting the state while traveling to other destinations along north/south highways.

NC Overnights

Raleigh-Durham-Fayetteville (12.5%)
Charlotte (9.7%)
Greensboro-High Point-Winston Salem (7.7%)
Atlanta (6.3%)
Greenville-Spartanburg-Asheville (3.9%)
New York (3.4%)
Washington, DC (Hagerstown, MD) (2.9%)
Norfolk-Portsmouth-Newport News (2.5%)
Greenville-New Bern-Washington (2.3%)
Roanoke-Lynchburg (2.4%)
Columbia (2.2%)
Richmond-Petersburg (2.0%)
Wilmington (1.8%)
Baltimore (1.6%)
Philadelphia (1.5%)
Charleston, SC (1.5%)
Tampa-St. Petersburg-Sarasota (1.5%)
Myrtle Beach-Florence (1.4%)
Orlando-Daytona Beach-Melbourne (1.3%)
Pittsburgh (1.1%)
Knoxville (1.1%)
Jacksonville, FL (1.0%)
West Palm Beach-Ft. Pierce (1.0%)
Savannah (0.9%)
Cleveland-Akron (Canton) (0.9%)

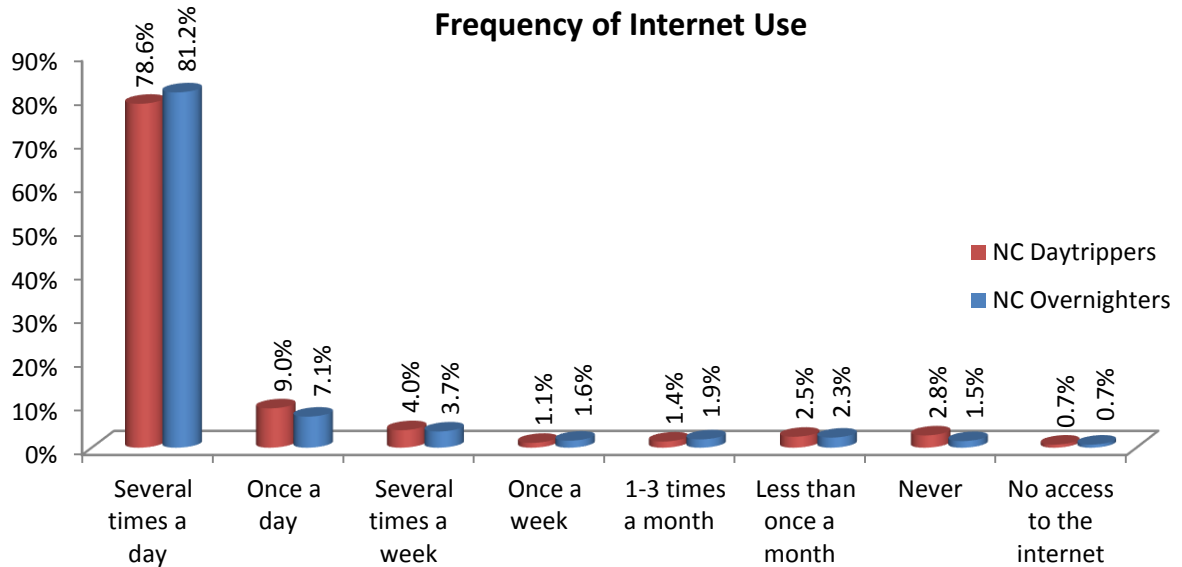
NC Daytrippers

Raleigh-Durham-Fayetteville (23.9%)
Charlotte (20.1%)
Greensboro-High Point-Winston Salem (15.7%)
Greenville-Spartanburg-Asheville (9.0%)
Greenville-New Bern-Washington (8.7%)
Roanoke-Lynchburg (4.0%)
Wilmington (3.0%)
Atlanta (2.6%)
Columbia (2.3%)
Myrtle Beach-Florence (1.6%)
Richmond-Petersburg (1.2%)
Tri-Cities, TN-VA (1.2%)
Norfolk-Portsmouth-Newport News (1.1%)
Knoxville (0.8%)
Chattanooga (0.7%)
Nashville (0.5%)
New York (0.4%)
Savannah (0.4%)
Augusta (0.4%)
Tampa-St. Petersburg-Sarasota (0.3%)
Cleveland-Akron (Canton) (0.3%)
Tallahassee (0.3%)
Charleston, SC (0.3%)
Washington DC (0.2%)
Miami-Ft. Lauderdale (0.2%)

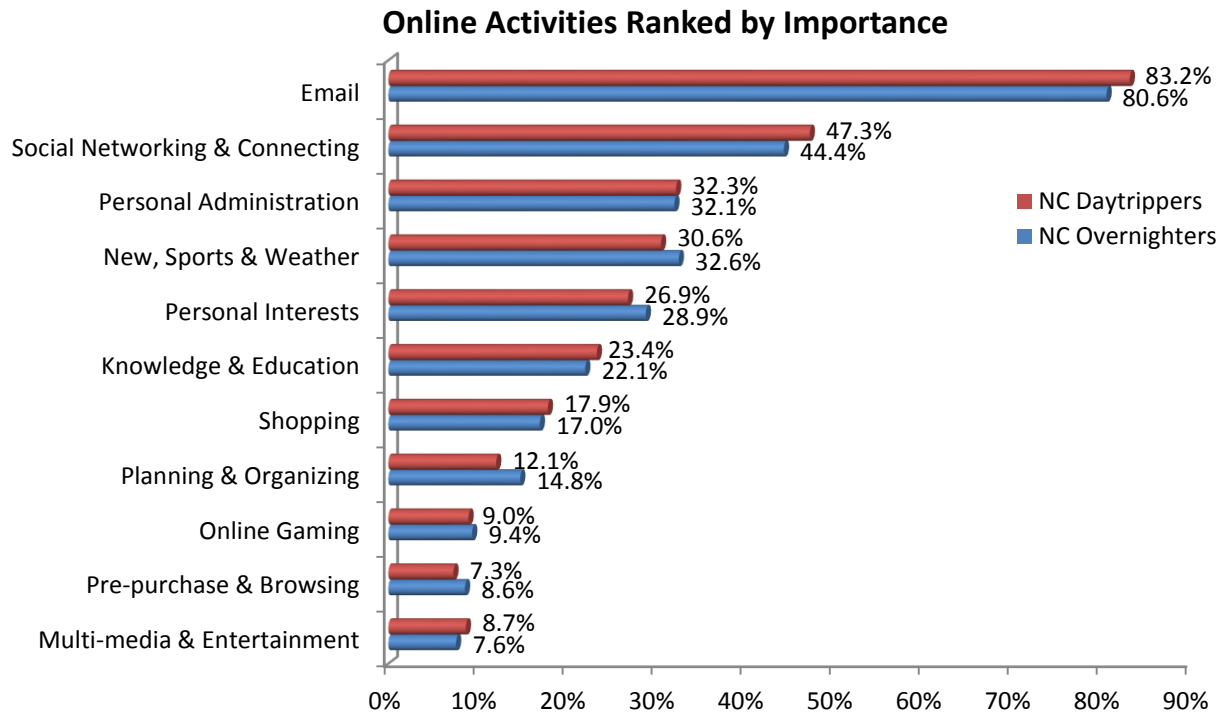
Note: Advertising markets defined by Nielsen's Designated Market Area (DMA)

Importance of Internet

Frequent use of the Internet was similar between daytrippers and overnights to and within North Carolina in 2014. Nearly ninety percent of both types of travelers access the Internet at least once per day.

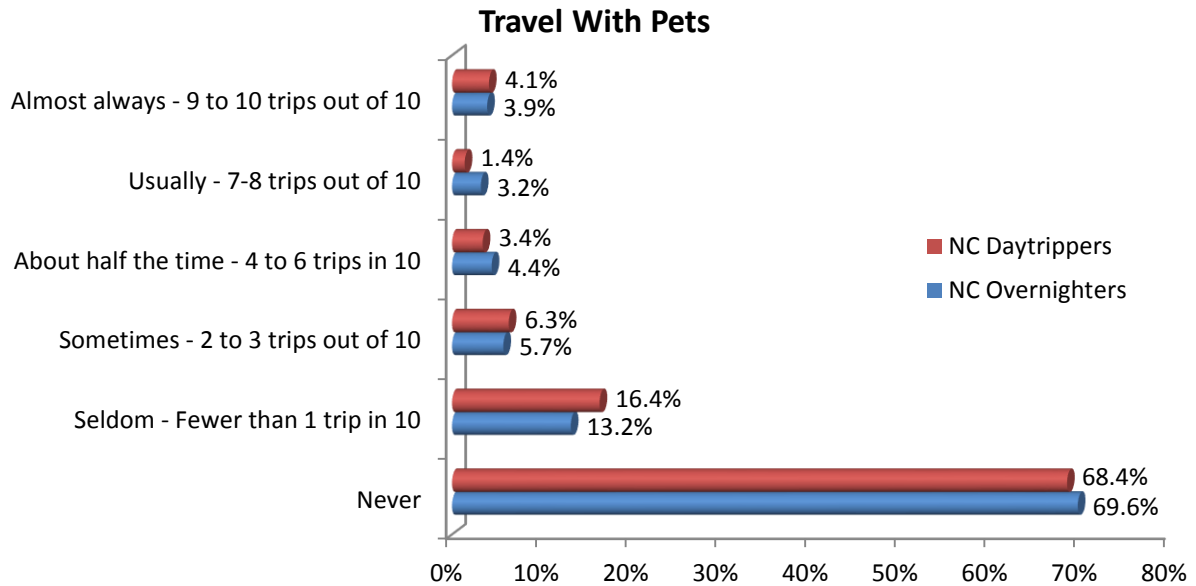


Overnights and daytrippers to North Carolina place similar importance to various online activities. Email ranks top for both types of travelers. Daytrippers ranked social networking and email slightly higher, while overnights ranked planning and organizing activities and pre-purchase and browsing higher.



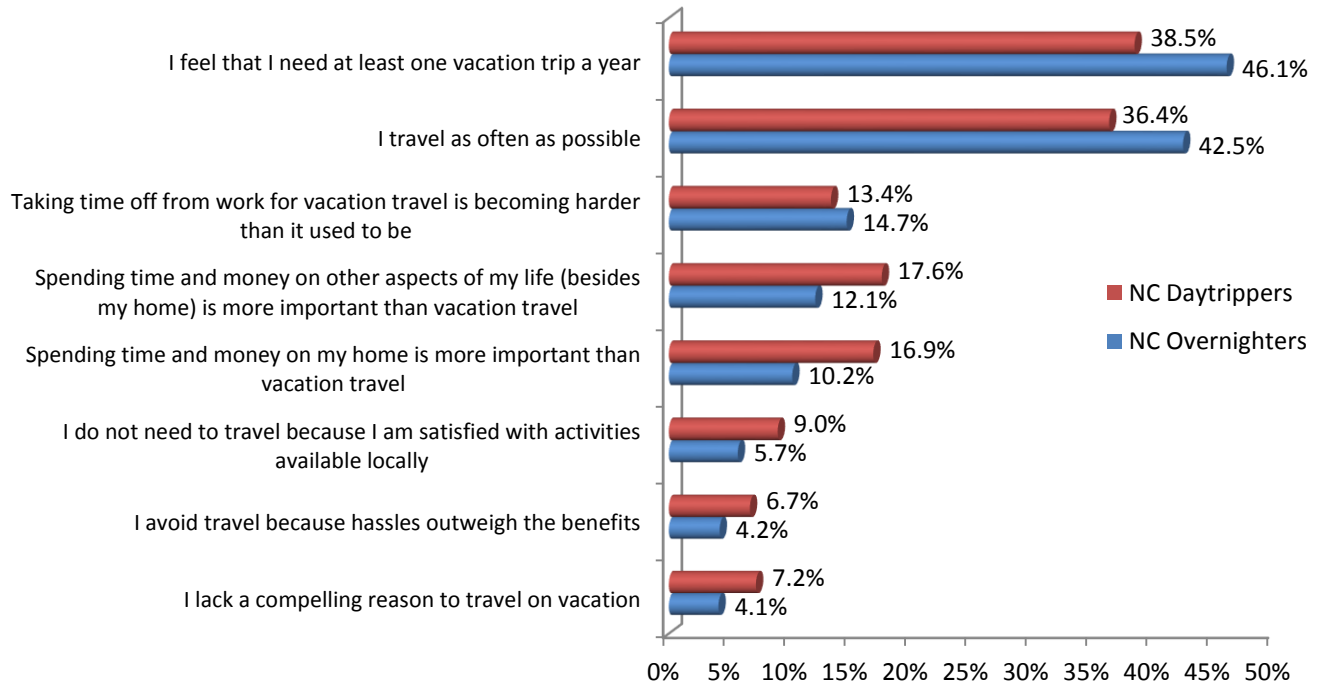
Vacation Attitudes

The majority of North Carolina visitors, both overnights and daytrippers, do not travel with pets. Overnight visitors are slightly more likely to travel with pets than daytrippers.



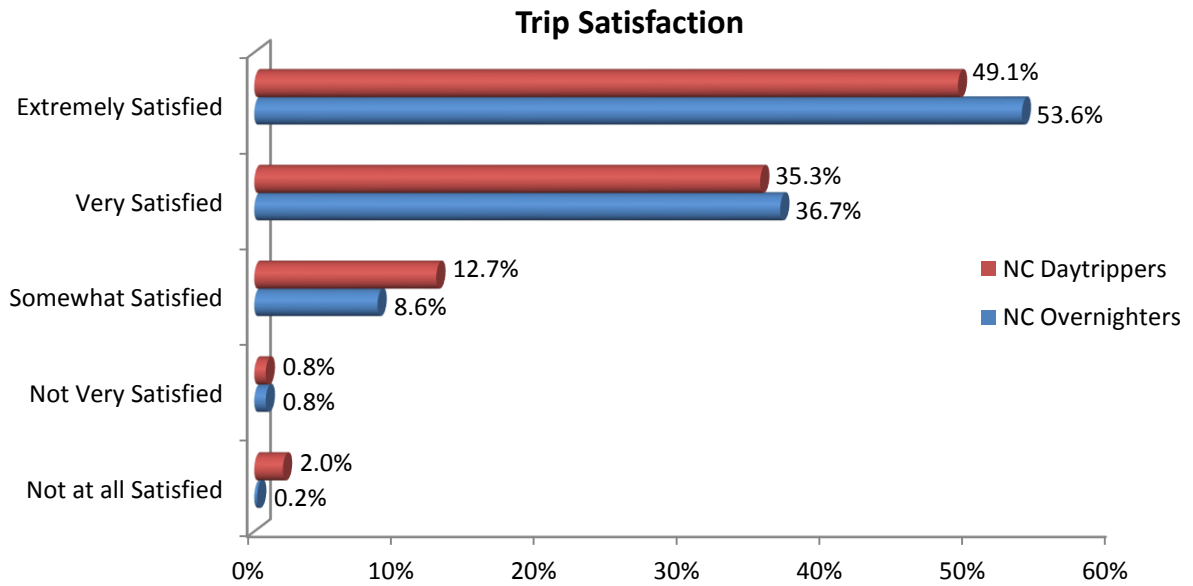
Not surprisingly, a larger proportion of overnights feel the need for a vacation at least once a year than daytrippers, though nearly forty percent of daytrippers report that they need vacation trips as well.

Current Feelings Concerning Vacation Travel



Trip Satisfaction

Both overnight visitors and daytrippers in North Carolina reported high trip satisfaction in 2014. Ninety percent of overnights and eighty-four percent of daytrippers expressed they were extremely or very satisfied with their trip.



2014 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.