



# **2011 North Carolina Regional Travel Summary**

**A publication of the North Carolina Division of  
Tourism, Film & Sports Development**

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## **2011 North Carolina Regional Travel Summary**

The North Carolina Division of Tourism, Film and Sports Development has contracted with the research company TNS for five years to perform demographic profiles and volume analyses on the North Carolina travel and tourism industry. 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 purpose of this regional report is to provide each region with research data specific to their geographic area. The report is divided into three sections: Mountain, Piedmont, and Coast. Where applicable, regional statistics are compared to statewide statistics to provide regions with information relevant to how they compare to NC travel in general. In addition, comparisons to 2010 are also offered as available. In the final section of the report, a comparison between the three regions is offered. At the end of the report, an appendix offers definitions of key travel terms.

# 2011 North Carolina Regional Travel Summary

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## 2011 Domestic Coastal Region Total Travel

### Summary

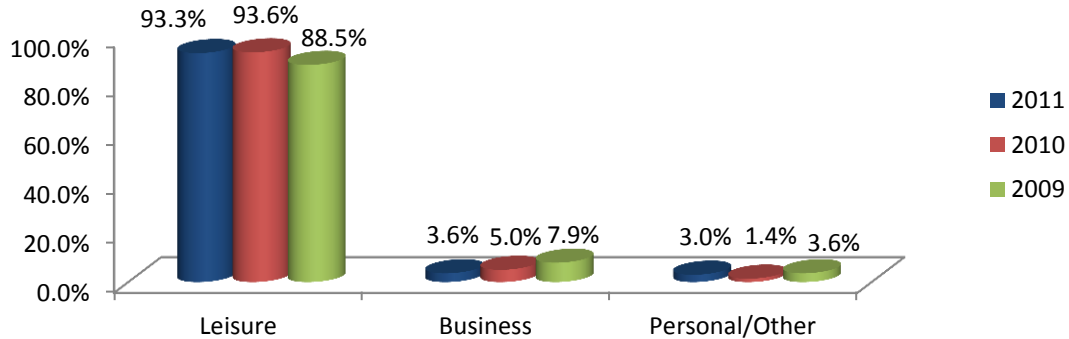
- ◆ In 2011, over 20 percent of North Carolina visitors traveled to North Carolina’s Coastal Region, approximately 8.9 million person-trips. For marketing purposes, the Coastal Region is made up of twenty-eight most eastern counties of North Carolina.
- ◆ Over ninety percent of all domestic visitors (and 93% of overnight visitors) came to the Coastal Region for pleasure purposes, while nearly five (4.5%) percent of visitors came to conduct business (includes meeting/convention). The remaining visitors indicated personal business or “other” reason for visiting the coast.
- ◆ The summer (June - August) was the most popular season for travel to North Carolina’s Coastal Region, with fifty percent of all 2011 coastal visitors. Spring (March-May) and fall (September - November) followed with twenty-two percent and twenty-one percent of coastal visitors respectively. The winter season (December-February) was the least visited with nine percent. July was the single largest month for coastal travel with over eighteen (18.4%) percent.
- ◆ Overnight visitors to the Coastal Region spent an average of 4.5 nights in the region in 2011, up from 4.4 nights in 2010.
- ◆ Fifty percent of Coastal Region visitors stayed in a private home while thirty-five percent lodged at a hotel/motel. Eleven percent stayed in a timeshare or condo.
- ◆ The average travel party size for all Coastal Region visitors was 2.4 people, up from 2.3 in 2010. Thirty-nine percent of overnight travel parties to the region included children in the party.
- ◆ Ninety-one percent of overnight travelers to the Coastal Region drove (includes personal automobile, rental, motorcycle and RV), while over six percent traveled by air.
- ◆ In 2011, the average household trip expenditure in the Coastal Region was \$859, up from \$698 in 2010. The average household trip expenditure for overnight visitors to the Coastal Region was \$1,003. Daytrip parties to the Coast region spent approximately \$293 per visit.
- ◆ The top states of origin of *overnight* visitors to the Coastal Region were North Carolina (37.9%), Virginia (14.5%), Pennsylvania (8.1%), New Jersey (4.4%), New York (4.2%), Ohio (4.1%), and Maryland (2.9%).
- ◆ Sixty-three percent of all households that traveled to North Carolina’s Coastal Region in 2011 had a household income over \$50,000.
- ◆ In 2011, Raleigh/Durham/Fayetteville (14.9%) was the top advertising market of origin for *overnight* travelers to the Coastal Region, followed by Greenville-New Bern-Washington (7.5%), Charlotte (6.3%), Greensboro/High Point/Winston Salem (6.0%), New York (5.8%), Washington DC (5.8%), Philadelphia (4.7%) and Richmond-Petersburg (4.2%).

## Coastal Region Overnight Visitor Profile

### Main Purpose of Visit

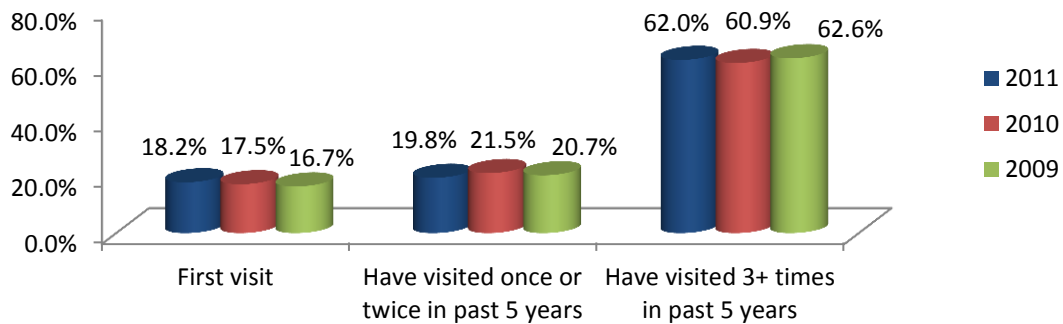
In 2011, over nine out of ten (93.3%) of domestic overnight visitors came to the Coastal Region for leisure purposes, which included visiting friends and relatives, outdoor recreation and entertainment/sightseeing. Just under four percent of domestic overnight visitors came for general business, convention, seminar or other group meeting, while three percent traveled to the Coastal Region to conduct personal or “other” business.

**2011 Primary Purpose of Overnight Trip to North Carolina's Coastal Region**



While the majority of Coastal Region visitors are repeat visitors to North Carolina, first time visitors grew to eighteen percent in 2011.

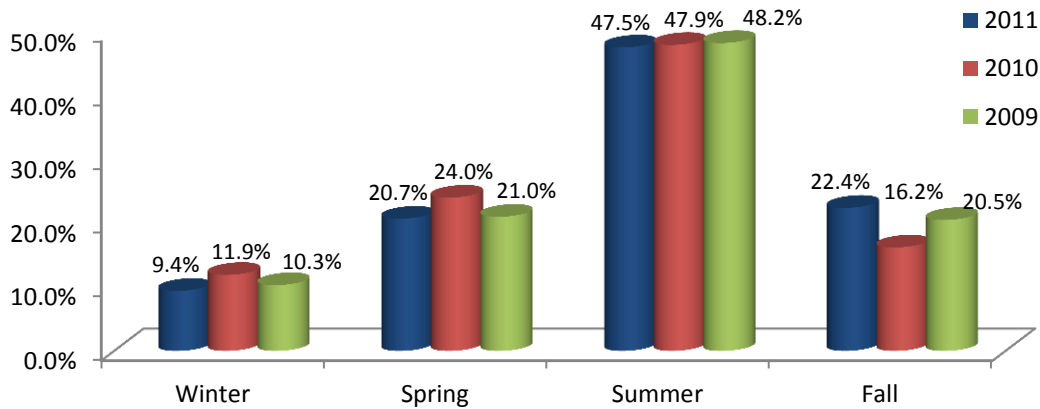
**2011 First Time vs. Repeat Visitors to North Carolina's Coastal Region**



## Travel Volume by Season

When examining visitation based on the typical seasonal schedule, the summer (June through August) with nearly fifty percent was the most popular season of the year for overnight travel to North Carolina’s Coastal Region. The fall (September through November) and spring (March through May) were next with twenty-two and twenty-one percent respectively, followed by winter (December through February) with nine percent. While summer travel remained consistent to previous years, the spring and fall reversed slightly with regards to proportion of visitors.

**2011 Overnight Travel by Season to North Carolina's Coastal Region**



## Average Length of Stay

In 2011, an average of 4.5 nights was spent by visitors to North Carolina’s Coastal Region, up slightly from 4.4 nights in 2010.

## Travel Party Size

The average travel party size for all Coastal Region overnight visitors was 2.4 people, up slightly from 2.3 in 2010.

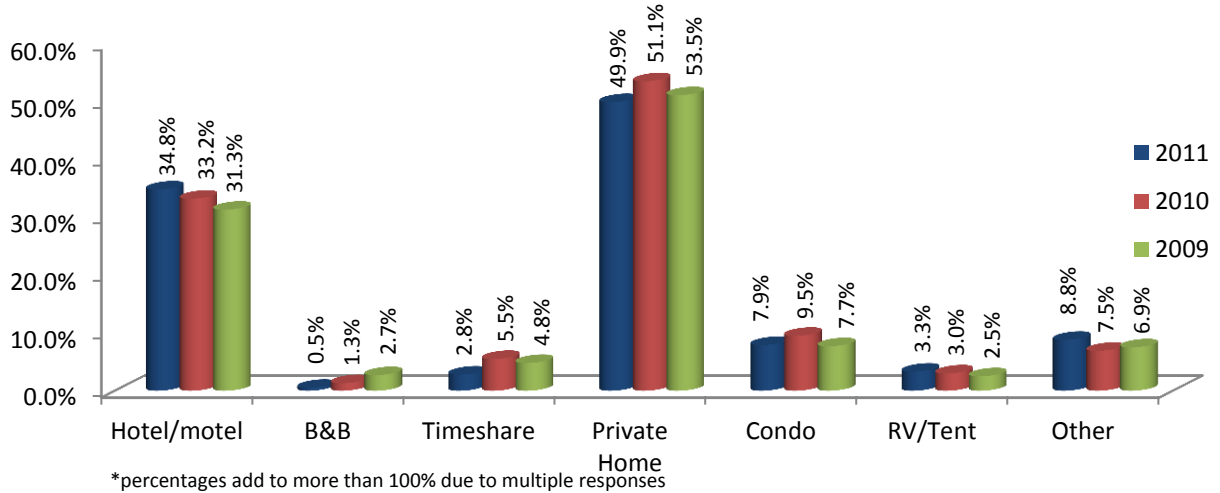
## Children on Trip

Thirty-nine percent of overnight visitor parties to the Coastal Region included children (36% in 2010 & 35% in 2009). Among those who traveled with children, the average number of children on trips was 2.1.

## Lodging Used in Coastal Region

In 2011, nearly one-half of Coastal Region visitors stayed in a private home (49.9%), while nearly thirty-five percent lodged at a hotel/motel, an increase from 2010. Almost eight percent stayed in a condo.

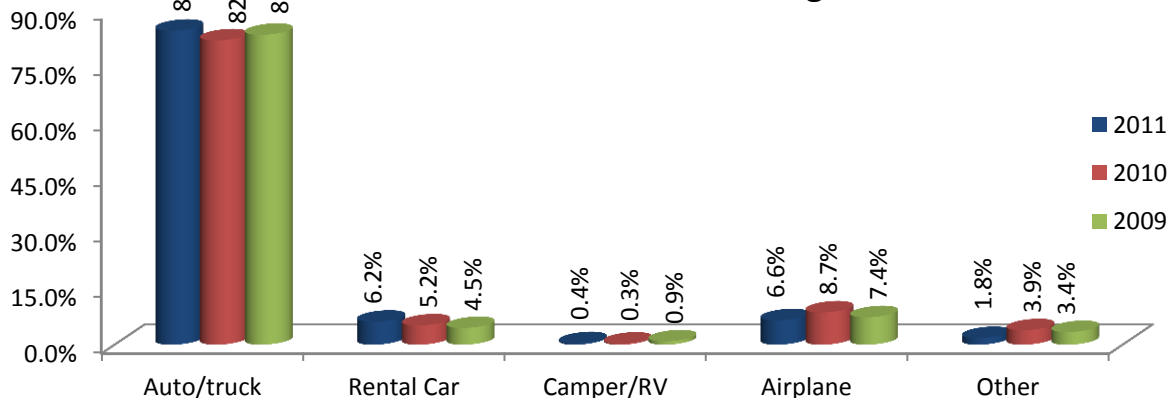
**2011 Lodging by Overnight Visitors to North Carolina's Coastal Region**



## Mode of Transportation

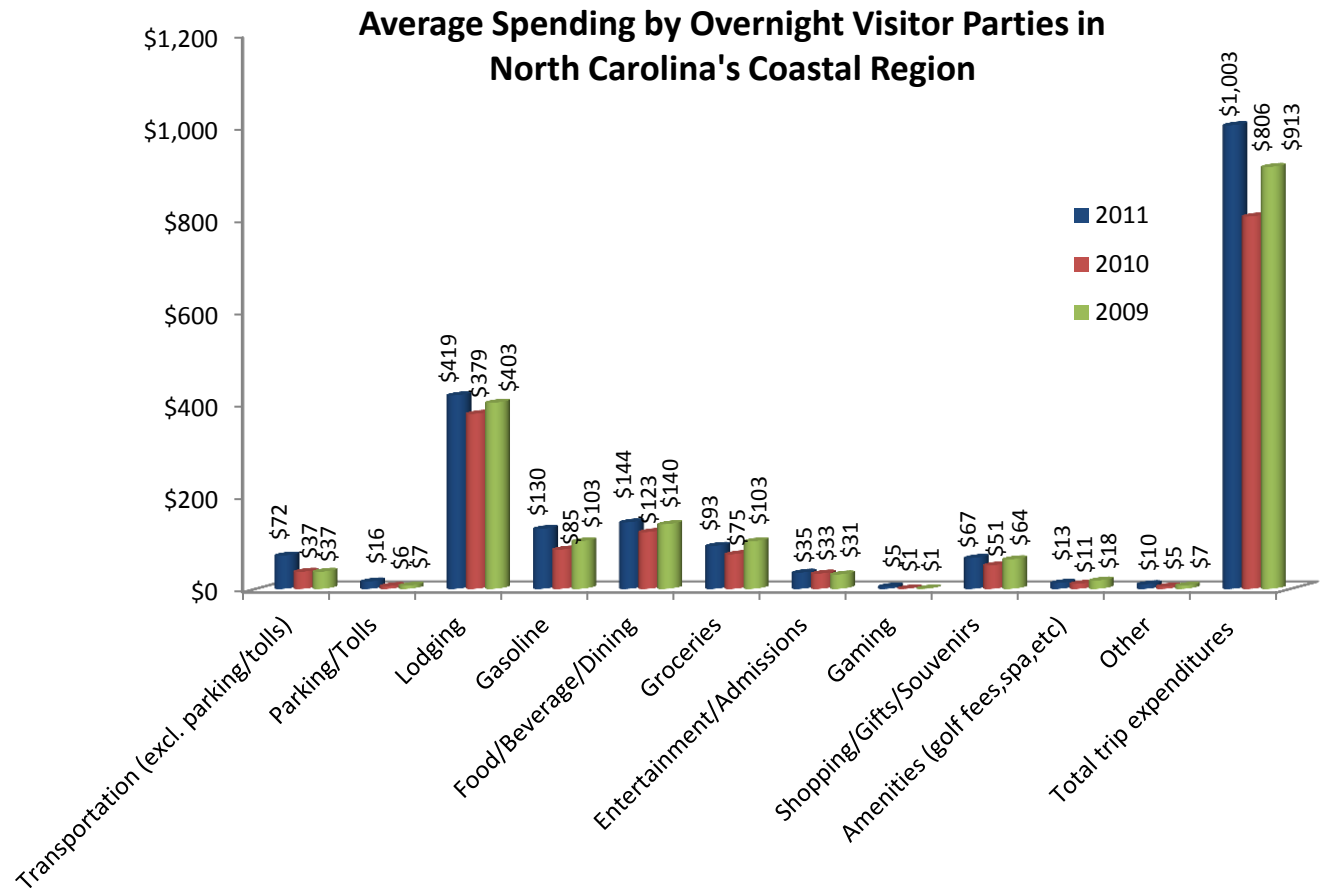
In 2011, the personal auto was by far the dominant form of transportation (84.6%) to the Coastal Region, while nearly seven percent traveled by air, a slight decrease from nearly nine percent in 2010.

**2011 Primary Mode of Transportation to North Carolina's Coastal Region**



### Amount Spent in Coastal Region

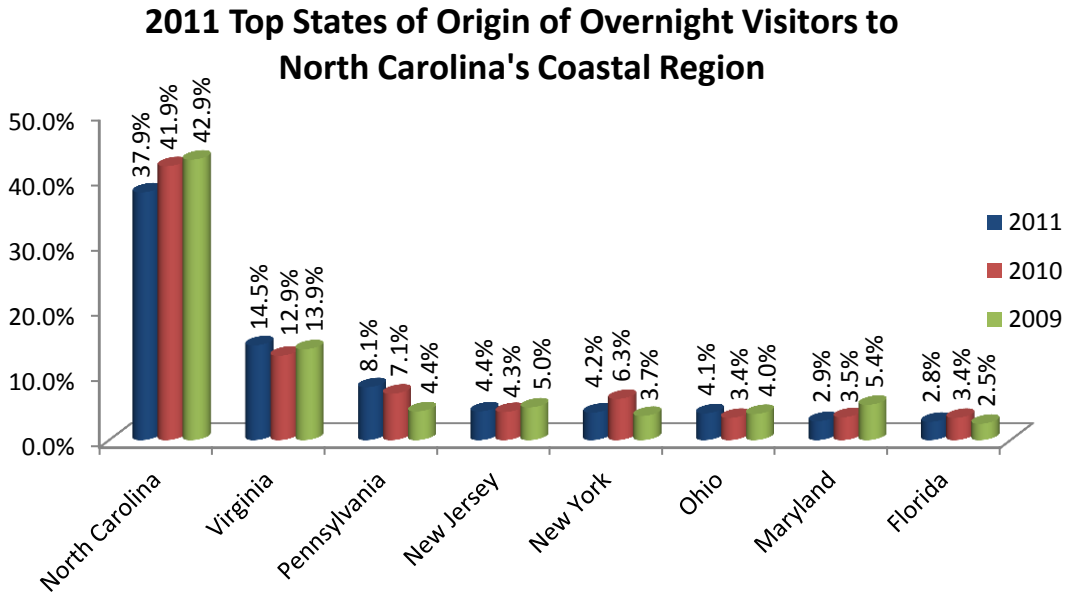
The average overnight visitor party spending in the Coastal Region topped \$1,000 in 2011, a 24% increase from \$806 in 2010. Spending increased in every category, particularly in the transportation, gasoline, parking and food/beverage categories.





## Origin of Visitors

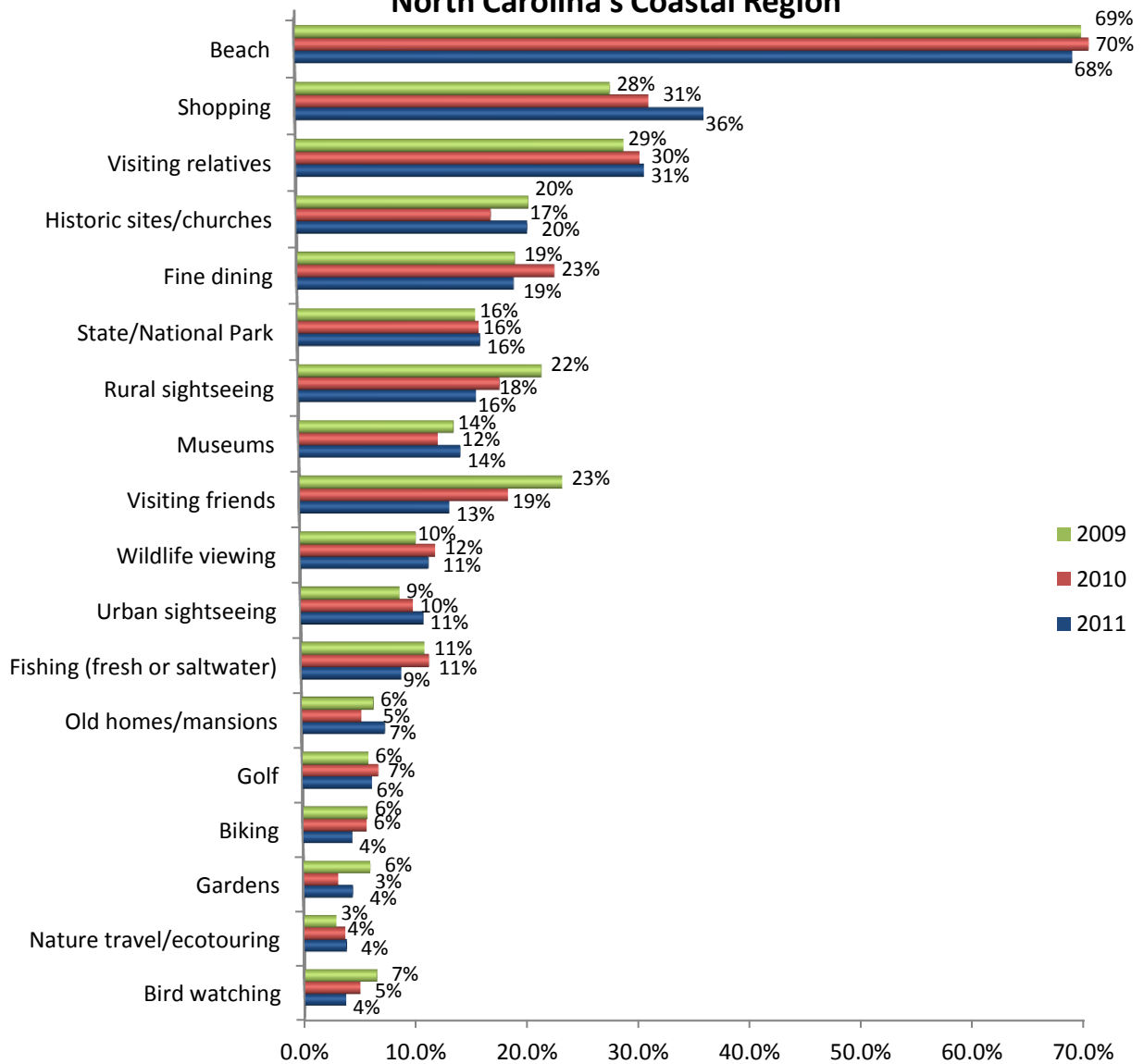
In 2011, the top states of origin for Coastal Region overnight visitors included North Carolina (37.9%), Virginia (14.5%), Pennsylvania (8.1%), New Jersey (4.4%) and New York (6.2%). The proportion of visitors from Virginia to the coast increased from 12.9% in 2010 to 14.5% in 2011. The proportion of visitors to the Coastal Region from Pennsylvania has nearly doubled in the last two years as well from 4.4% in 2009 to 8.1% in 2011.



## Activities

Nearly seventy percent of the overnight visitors to North Carolina’s Coastal Region went to a beach while visiting the region, down slightly from 2010. Over one-third (31%) of overnight visitors shopped while visiting the state, up five percent from 2010. Other popular activities included visiting relatives (31%), visiting historic sites/churches (20%), fine dining (19%), visiting state/national parks (16%), and rural sightseeing (16%). **\*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.**

2011 Activities Participated in by Overnight Visitors to North Carolina's Coastal Region



## **Demographic Profile of North Carolina Coastal Region Overnight Visitors**

The North Carolina Coastal Region overnight visitor gender breakdown is sixty-one percent female and thirty-nine percent male. More than half (67.1%) of the visitors are married and just under sixteen percent of the region's visitors are divorced, widowed or separated.

The largest proportion of North Carolina coastal region overnight visitors classify themselves as white (87.3%), and nearly eight percent classify themselves as black/African American (up from 5% in 2010).

Over half (56.6%) of Coastal Region overnight visitor parties have a household head with a college degree or higher. The average Coastal region visitor is 45 years old, with almost one-half (48.2%) being 45 years old or older.

Over forty percent (42.5%) of the visitor parties that traveled to North Carolina's Coastal Region in 2011 had a household income \$75,000 or over. Twelve percent had a household income of over \$125,000.

## 2011 Top Advertising Markets

In 2011, the top advertising markets sending overnight visitors to **North Carolina's Coastal Region** were Raleigh-Durham-Fayetteville (14.9%), Greenville-New Bern-Washington (7.5%), Charlotte (6.3%), Greensboro-Winston-Salem-High Point (6.0%), New York, NY (5.8%) and Washington DC (5.8%). Advertising markets correspond with Nielsen's Designated Market Areas (DMAs).

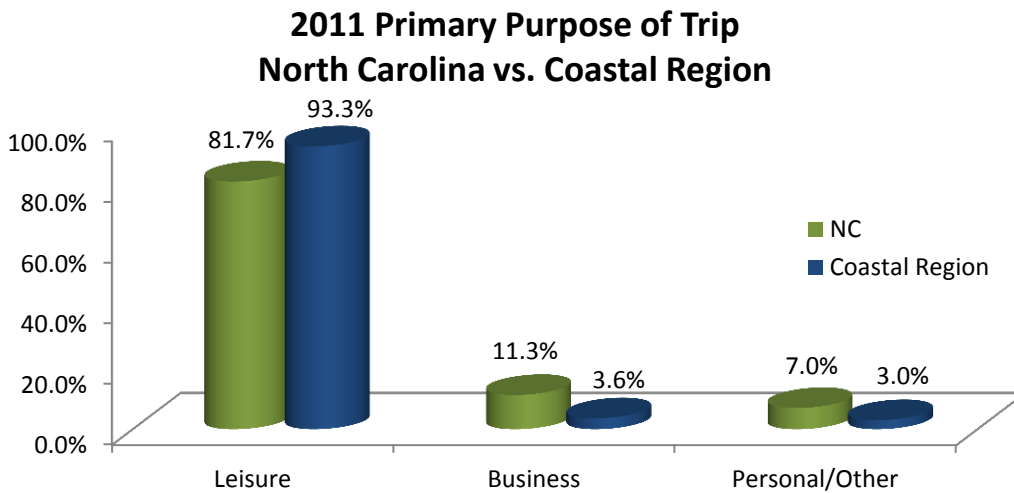
### Top Advertising Markets of Origin for *Overnight* Coastal Region Visitors

<i>DMA of Origin</i>	<i>2011 % of Total Visitors to Coastal Region</i>	<i>2010 % of Total Visitors to Coastal Region</i>	<i>2009 % of Total Visitors to Coastal Region</i>	<i>2011 Coastal Market Share of NC Visitors from DMA</i>	<i>2010 Coastal Market Share of NC Visitors from DMA</i>	<i>2009 Coastal Market Share of NC Visitors from DMA</i>
Raleigh-Durham (Fayetteville)	14.9%	20.9%	15.0%	20.0%	29.6%	21.8%
Greenville-New Bern-Washington	7.5%	3.9%	5.8%	29.1%	19.5%	27.7%
Charlotte	6.3%	7.0%	8.1%	10.3%	15.3%	17.6%
Greensboro-High Point-Winston Salem	6.0%	6.7%	7.7%	13.7%	20.9%	19.7%
New York, NY	5.8%	6.5%	6.1%	21.5%	26.3%	25.3%
Washington DC (Hagerstown, MD)	5.8%	5.4%	7.7%	28.2%	25.3%	27.5%
Philadelphia, PA	4.7%	5.6%	3.5%	39.0%	40.4%	31.1%
Richmond-Petersburg, VA	4.2%	2.9%	3.3%	36.8%	28.6%	35.1%
Pittsburgh	3.0%	2.5%	1.0%	40.0%	43.5%	17.4%
Norfolk-Portsmouth-Newport News, VA	3.0%	6.1%	7.3%	17.5%	40.0%	39.2%
Roanoke-Lynchburg	2.5%	1.5%	2.3%	23.5%	15.0%	20.0%
Baltimore	1.9%	1.8%	1.7%	23.1%	28.0%	23.3%
Atlanta	1.9%	0.1%	1.4%	5.1%	0.0%	5.3%
Los Angeles	1.4%	0.3%	0.3%	23.8%	11.1%	5.3%
Greenville-Spartanburg-Asheville-Anderson	1.3%	0.7%	2.0%	5.1%	3.3%	7.5%
Wilmington	1.2%	1.5%	2.6%	9.8%	14.0%	27.0%
Knoxville	1.2%	0.2%	0.2%	7.0%	3.8%	3.4%

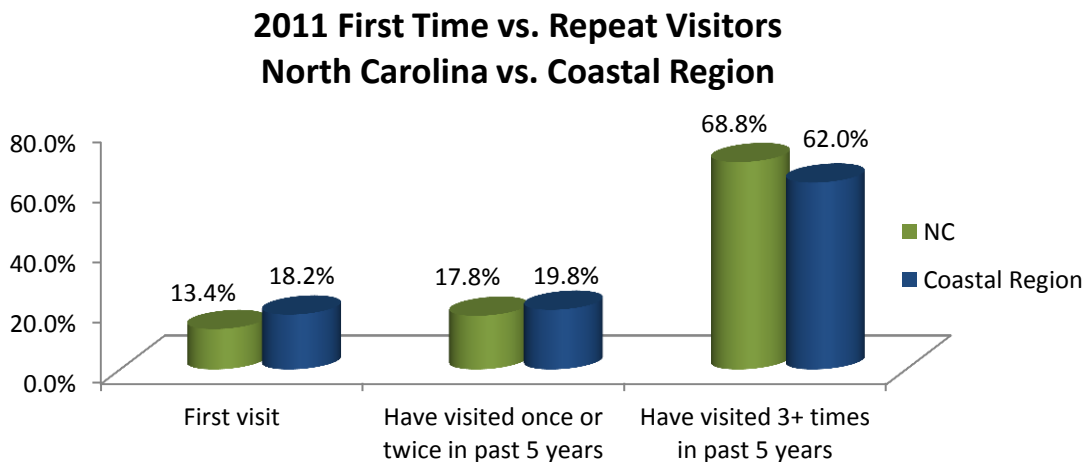
Note: Advertising markets defined by Nielsen's Designated Market Area (DMA)

## 2011 Coastal Region versus North Carolina

North Carolina’s Coastal Region had a larger share of overnight visitors travel to the region for leisure reasons than North Carolina as a state (82% North Carolina vs. 93% Coastal Region). At the same time, North Carolina’s share of business/convention travelers was nearly three times as large as the proportion for the Coastal Region (11% North Carolina vs. 4% Coastal Region).

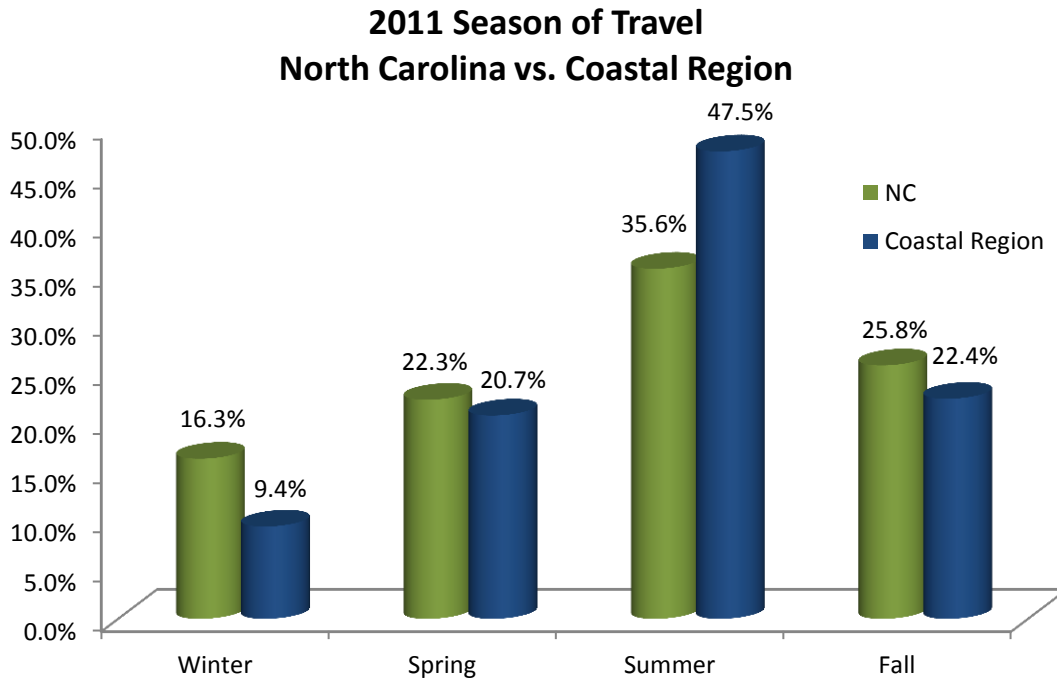


Coastal Region visitors are somewhat more likely to be first time visitors to the state than North Carolina visitors in general.



## Travel Volume by Season

During the summer season (June through August) the Coastal Region had a significantly higher percentage of overnight visitors than North Carolina as a whole, while North Carolina had higher percentages of visitors in the spring, fall and winter seasons.



## Average Length of Stay

In 2011, an average of 4.5 nights were spent by visitors to North Carolina’s Coastal Region, while the North Carolina overnight visitor stayed an average of 3.5 nights.

## Travel Party Size

The average travel party size for all Coastal Region overnight visitors was 2.4 people, while the average party size of the North Carolina visitor was 2 people.

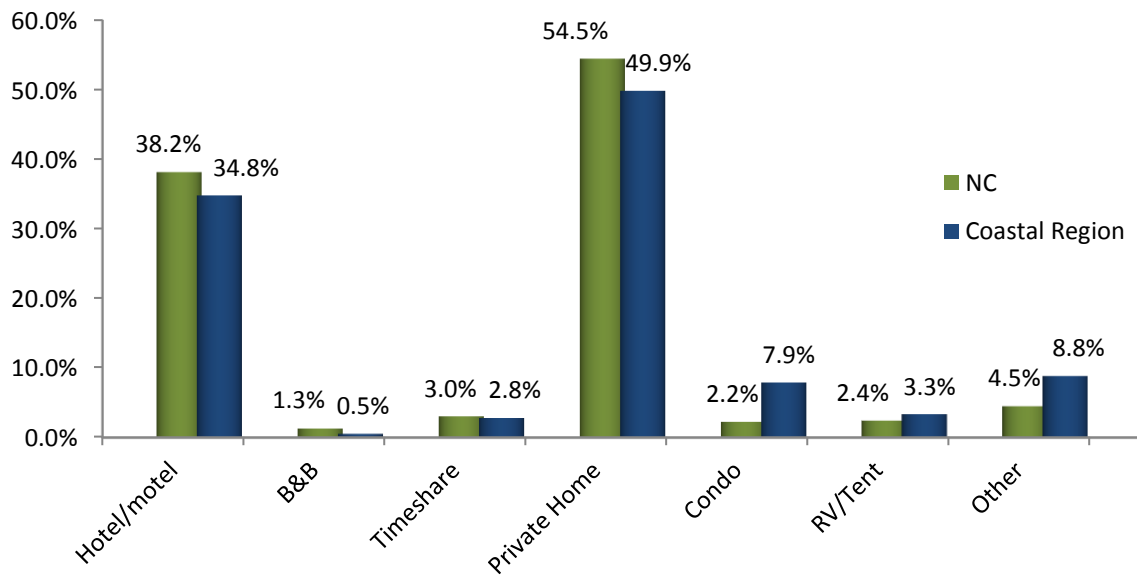
## Children on Trip

Thirty-nine percent of overnight visitor parties to the Coastal Region included children, up from thirty-six percent in 2010. Twenty-eight percent of overnight North Carolina visitor parties included children.

## Lodging Type

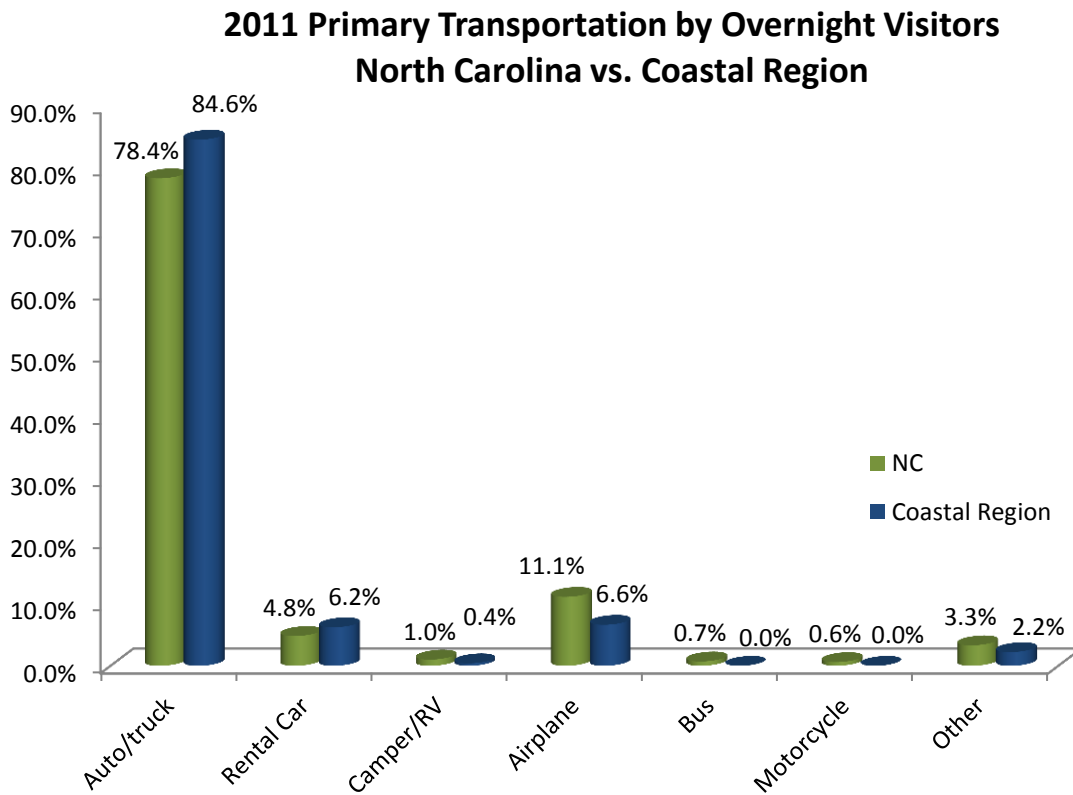
Both Coastal Region overnight visitors and North Carolina visitors in general are more likely to stay in a private home or hotel/motel than other types of lodging. However, Coastal visitors have a higher proportion for condo (2% North Carolina vs. 8% Coastal Region).

**2011 Lodging by Overnight Visitors to North Carolina vs. Coastal Region**



## Mode of Transportation

A higher percentage of travelers to the Coastal Region drove to their destination than all North Carolina visitors (85% North Carolina vs. 78% Coastal Region), while a higher percentage of travelers to North Carolina flew to their destination than Coastal Region visitors (11% North Carolina vs. 7% Coastal Region).

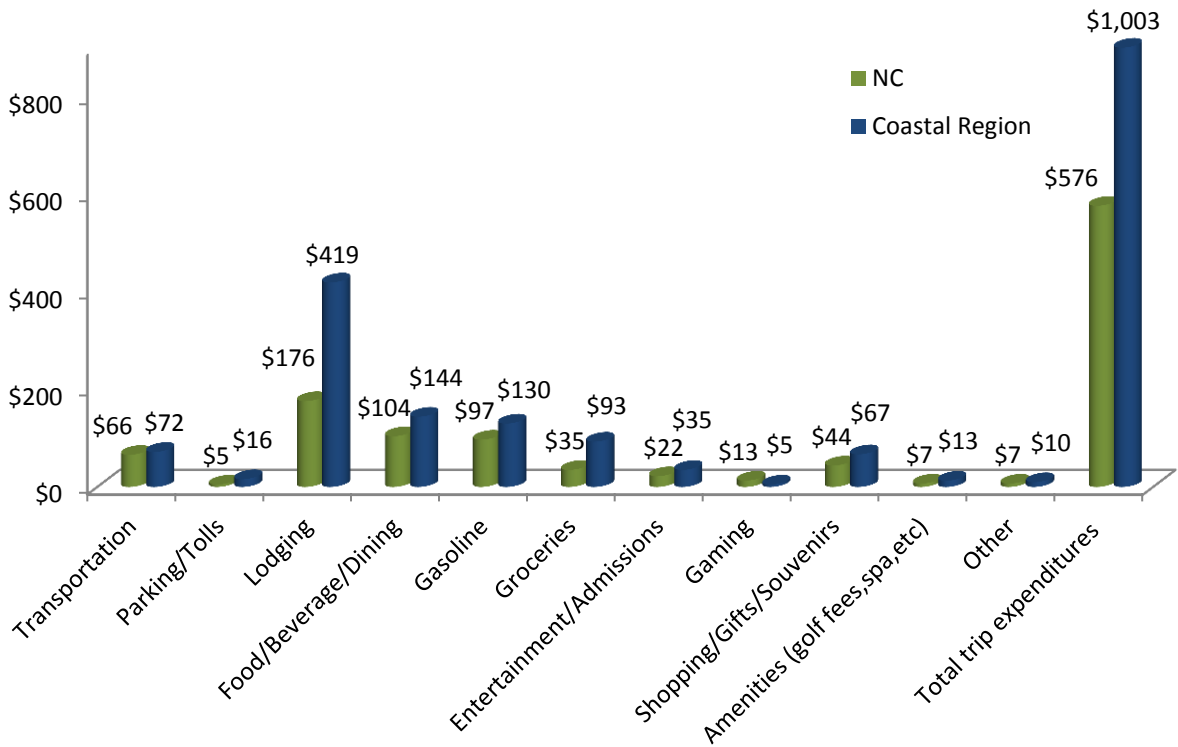




## Amount Spent in Coastal Region

The average overnight visitor party spending in the Coastal Region was \$1,003, much higher than the state average party spending of \$576. Much of the difference is in lodging; as explained in part by the longer average length of stay for Coastal Region visitors, affecting the cost of lodging per trip.

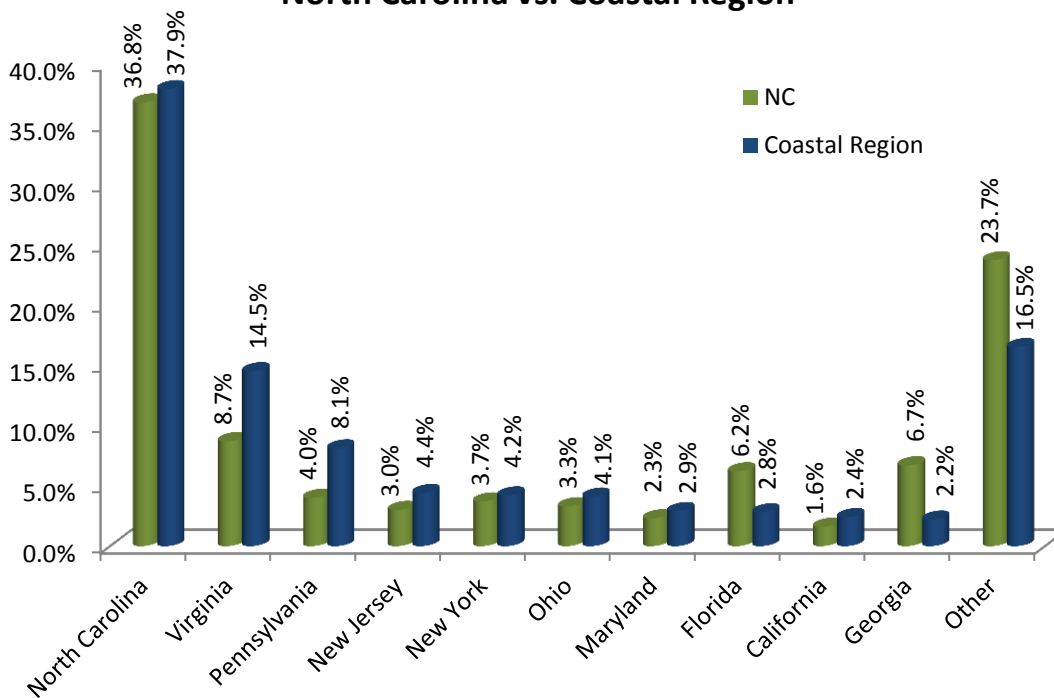
**2011 Average Spending by Overnight Visitor Parties  
North Carolina vs. Coastal Region**



## Origin of Overnight Visitors

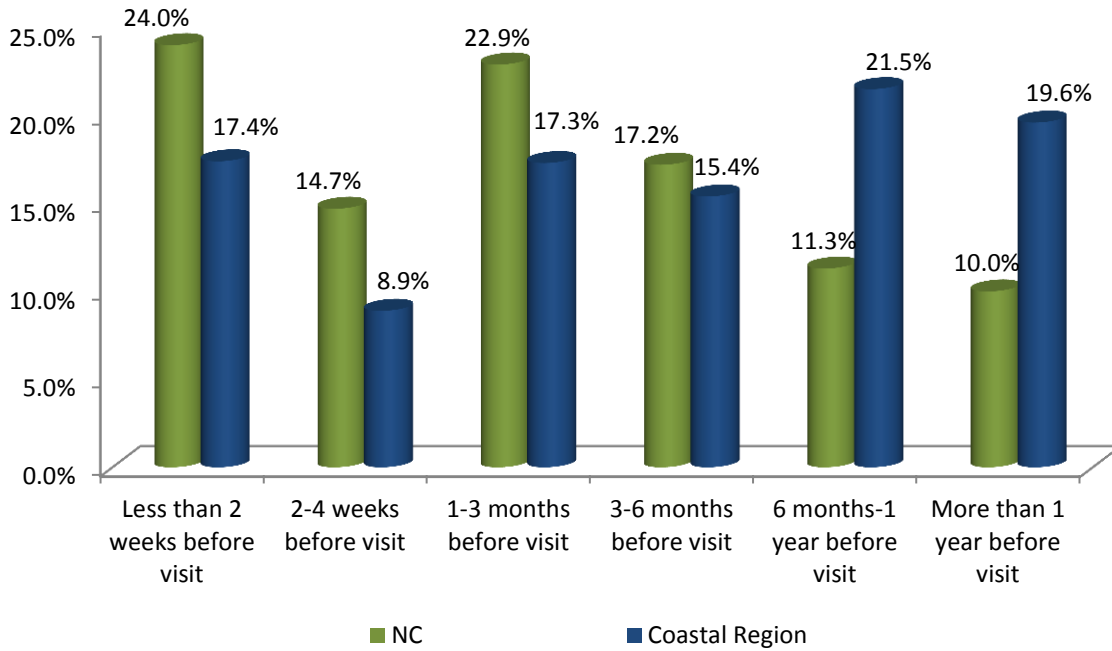
The top states of origin in 2011 are very similar between the Coastal Region and the state in general. However, the Coastal Region saw a higher percentage Virginia residents and Pennsylvania residents than the state as a whole; while the state saw a larger proportion of visitors from Georgia and Florida than the Coastal Region.

**2011 Top States of Origin of Overnight Visitors  
North Carolina vs. Coastal Region**



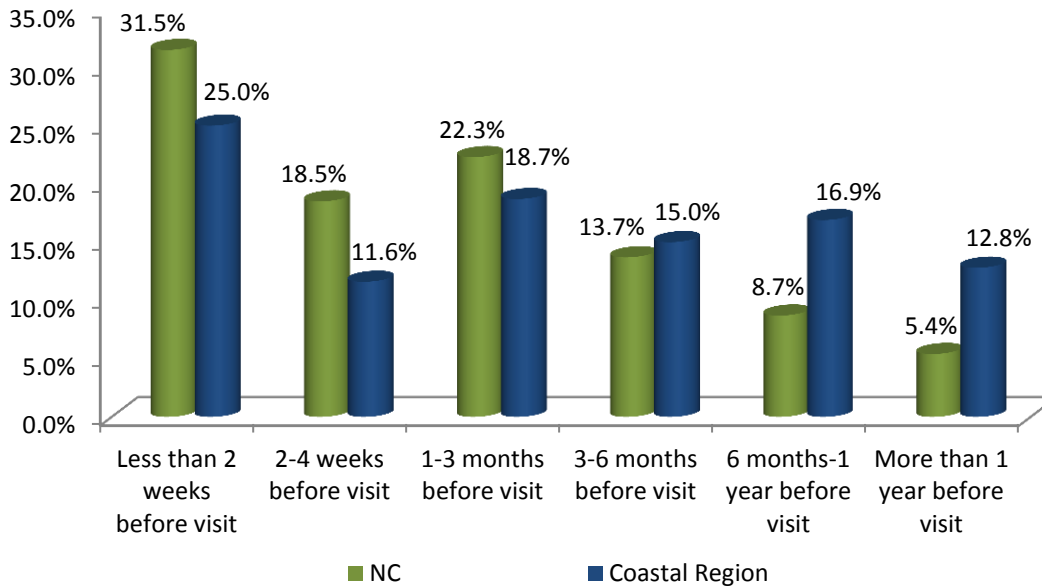
## Trip Planning

**2011 Length of Time to *Consider* NC as Travel Destination**



Coastal Region visitors typically consider and decide their vacation plans farther out in advance than North Carolina visitors in general. Over forty percent of Coastal Region visitors *considered* the state at least six months ahead of travel, and nearly thirty percent *decided* to visit at least six months ahead of travel.

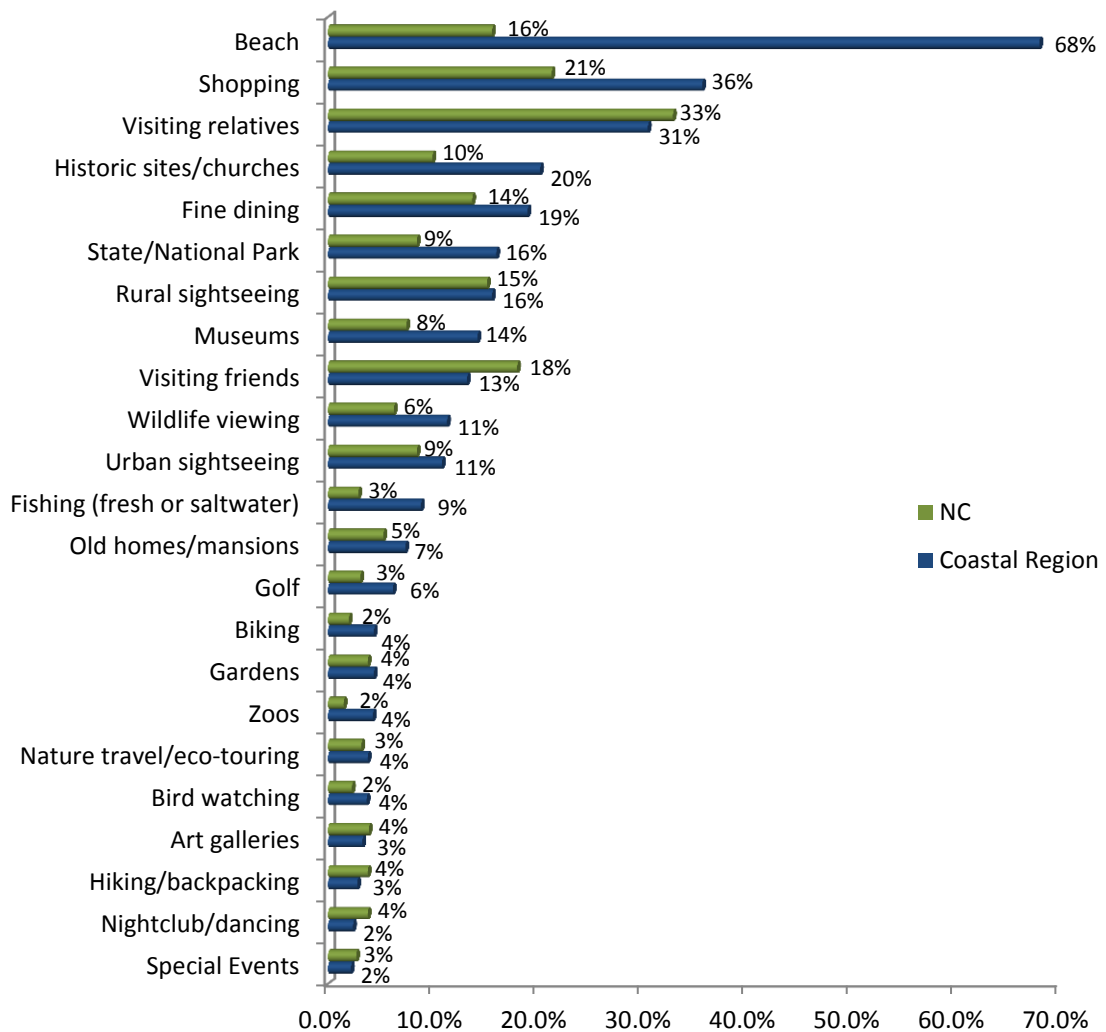
**2011 Length of Time *Decide* on NC as Travel Destination**



## Activities

Compared to all North Carolina overnight travelers, the Coastal Region naturally had a larger share of visitors go to the beach/waterfront (16% North Carolina vs. 68% Coastal Region). The region also had a larger proportion of visitors who shopped (21% North Carolina vs. 36% Coastal Region), participated in fine dining (14% North Carolina vs. 19% Coastal Region), visited a national/state park (9% North Carolina vs. 16% Coastal Region), visited museums (8% North Carolina vs. 14% Coastal Region) and visited historic sites/churches (10% North Carolina vs. 20% Coastal Region). ***\*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.***

2011 Activities Participated in by Overnight Visitors  
North Carolina vs. Coastal Region



## 2011 Demographic Profile for Overnight Visitor Parties to the Coastal Region

	<b>North Carolina</b>	<b>Coastal Region</b>
<b>Average age of household head</b>	45.9 years of age	45.5 years of age
<b>Education of Household Head</b>		
High school or less	16.2%	18.9%
Some college - no degree	23.1%	24.4%
Completed college	40.5%	36.9%
Post Graduate College	20.2%	19.7%
<b>Annual Household Income</b>		
Less than \$25,000	13.3%	10.0%
\$25,000-\$49,999	23.1%	24.8%
\$50,000-\$74,999	20.9%	22.4%
\$75,000 & over	42.4%	42.5%
<b>Marital Status</b>		
Married	61.5%	67.1%
Never married	20.3%	17.4%
Divorced, widowed, separated	18.2%	15.5%
<b>Ethnicity</b>		
White	83.2%	87.3%
Black/African American	10.8%	7.9%
Asian or Pacific Islander	2.2%	2.4%
Other	3.8%	2.4%

## 2011 Top Advertising Markets

While the top ten advertising markets sending visitors to North Carolina’s Coastal Region are similar to the top ten advertising markets for the state of North Carolina, there are visitor shares from advertising markets that differ slightly; such as Raleigh-Durham (12% North Carolina vs. 15% Coastal Region) and Charlotte (10% North Carolina vs. 6% Coastal Region).

### Top Advertising Markets of Origin for 2011 Overnight Coastal Region Visitors VS. North Carolina Visitors

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<i>DMA of Origin</i>	<i>Percent of Total Visitors to Coastal Region</i>	<i>Percent of Total Visitors to North Carolina</i>
Raleigh-Durham (Fayetteville)	14.9%	11.7%
Greenville-New Bern-Washington	7.5%	4.0%
Charlotte	6.3%	9.5%
Greensboro-High Point-Winston Salem	6.0%	6.8%
New York, NY	5.8%	4.3%
Washington DC (Hagerstown, MD)	5.8%	3.3%
Philadelphia, PA	4.7%	1.9%
Richmond-Petersburg, VA	4.2%	1.8%
Pittsburgh	3.0%	1.1%
Norfolk-Portsmouth-Newport News, VA	3.0%	2.7%
Roanoke-Lynchburg	2.5%	1.6%
Baltimore	1.9%	1.2%
Atlanta	1.9%	5.5%
Los Angeles	1.4%	1.0%
Greenville-Spartanburg-Asheville-Anderson	1.3%	3.7%

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

## 2011 Domestic Piedmont Region Travel

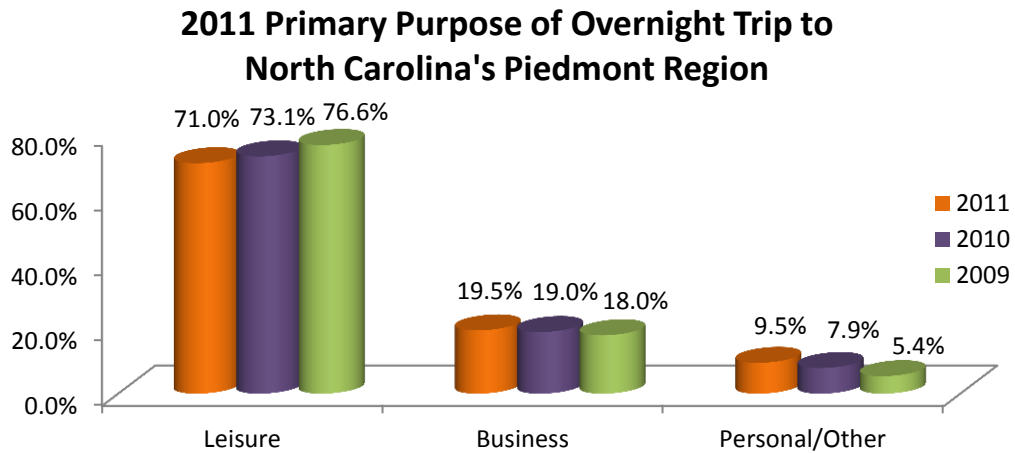
### Summary

- ◆ In 2011, sixty percent of North Carolina visitors traveled to North Carolina’s Piedmont Region, approximately 26.8 million person-trips. For marketing purposes, the Piedmont Region is made up of the 49 most central counties of North Carolina.
- ◆ Seventy percent of all domestic visitors came to the Piedmont Region for pleasure purposes, while eighteen percent of visitors came to conduct business (includes meeting/convention). The remainder visited for personal business or “other” reasons.
- ◆ Travel to the Piedmont Region of North Carolina was fairly consistent throughout the seasons. However, the summer (June - August) had a slightly higher proportion of visitors, with thirty-two percent of all 2011 piedmont visitors. Fall (September - November) followed with twenty-five percent of piedmont visitors, followed by winter (December - February) with twenty-two percent and spring (March - May) with twenty-one percent. August was the single largest month for piedmont travel with twelve percent.
- ◆ Overnight visitors to the Piedmont Region spent an average of 3.4 nights in the region. This was up from 3.3 nights in 2010.
- ◆ Forty-eight percent of Piedmont Region visitors stayed in a private home while fifty percent of visitors lodged in a hotel/motel.
- ◆ The average travel party size for all Piedmont Region visitors was 2.0 people. Twenty-six percent of travel parties to the region included children in the party.
- ◆ Seventy-nine percent of all overnight travelers to the Piedmont Region drove (includes personal automobile, rental, and motorcycle), while seventeen percent traveled by air.
- ◆ In 2011, the average household trip expenditure in the Piedmont Region was \$433. The average household trip expenditure for overnight visitors to the Piedmont Region was \$542. Daytrip parties to the Piedmont region spent approximately \$143 per visit in 2011.
- ◆ The top states of origin of *overnight* visitors to the Piedmont Region in 2011 were North Carolina (31.7%), Virginia (8.1%), South Carolina (7.3%), Georgia (6.6%), Florida (6.4%), and New York (5.2%).
- ◆ Sixty-two percent of the households that traveled to North Carolina’s Piedmont Region in 2011 had a household income over \$50,000.
- ◆ In 2011, Charlotte (11.6%) was the top advertising market of origin for *overnight* travelers to the Piedmont Region, followed by Raleigh/Durham/Fayetteville (10.4%), Greensboro/High Point/Winston-Salem (5.3%), New York (4.6%), Greenville-New Bern-Washington, NC (4.6%) Atlanta (4.3%), and Norfolk-Portsmouth-Newport News (4.0%).

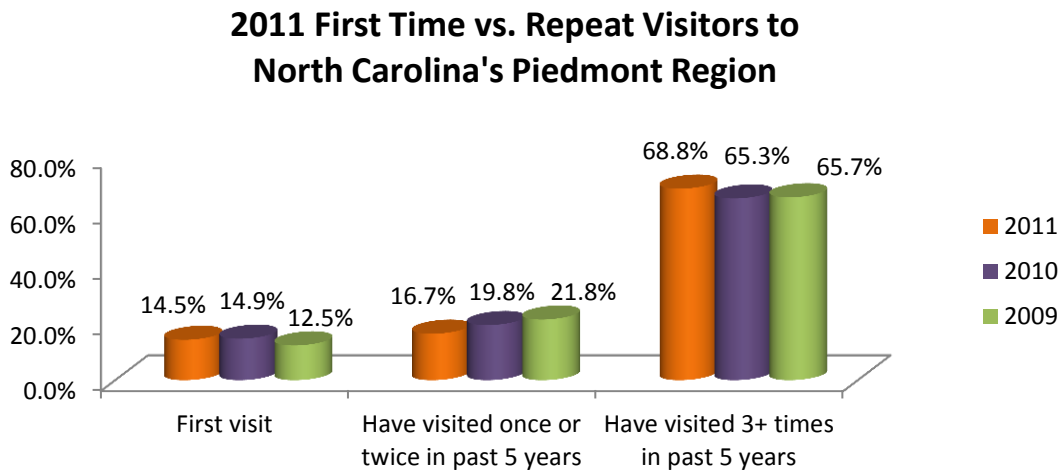
## Piedmont Region Overnight Visitor Profile

### Main Purpose of Visit

In 2011, seventy-one percent of domestic overnight visitors came to the Piedmont Region for leisure purposes, which included visiting friends and relatives, outdoor recreation and entertainment/sightseeing. However, business travel increased slightly from 2010 to over nineteen percent. Nearly ten percent traveled to the Piedmont Region to conduct personal or “other” business.



Repeat visitors to North Carolina comprised the largest proportion of Piedmont Region visitors, increasing from 65% to nearly 69% from 2010 to 2011.

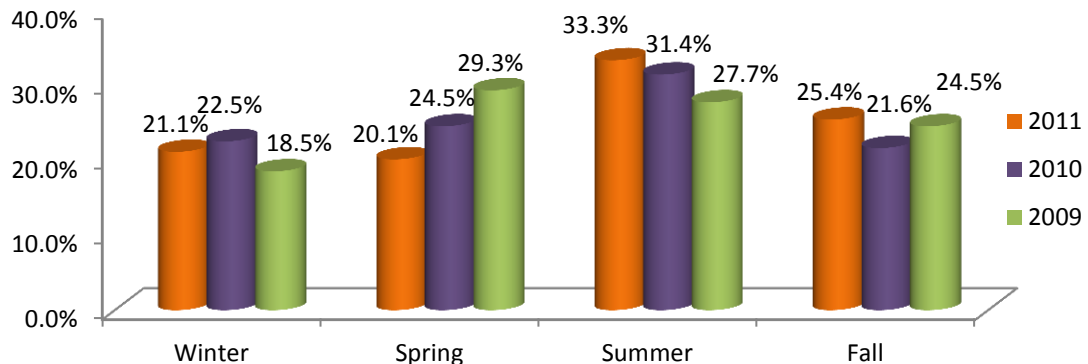




## Travel Volume by Season

Though the Piedmont Region typically sees more consistent visitation throughout the year than the other two regions, 2011 saw the summer and fall seasons increase in proportion of visitors and the winter and spring decrease in proportions. The summer (June through August) saw the most overnight visitation (33.3%). The fall (September through November) was next with twenty-five percent, followed by winter (December through February) with twenty-one percent and spring season (March through May) with twenty percent.

### 2011 Overnight Travel by Season to North Carolina's Piedmont Region



## Average Length of Stay

In 2011, an average of 3.4 nights was spent by visitors to North Carolina's Piedmont Region. This was a slight increase from the 2010 average length of stay of 3.3 nights.

## Travel Party Size

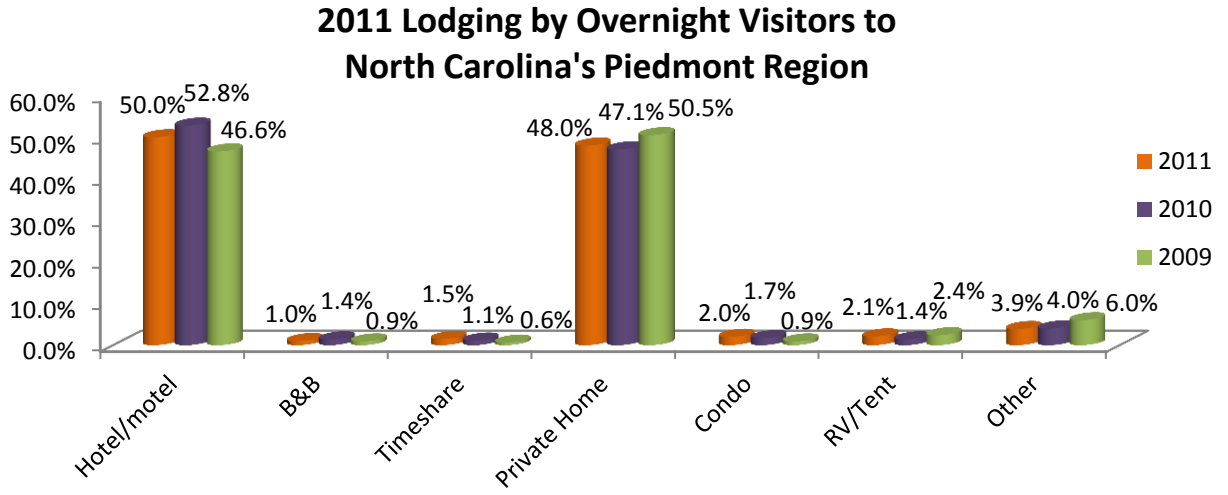
The average travel party size for all Piedmont Region overnight visitors was 1.9 people.

## Children on Trip

Twenty-five 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 1.8.

### Lodging Used in Piedmont Region

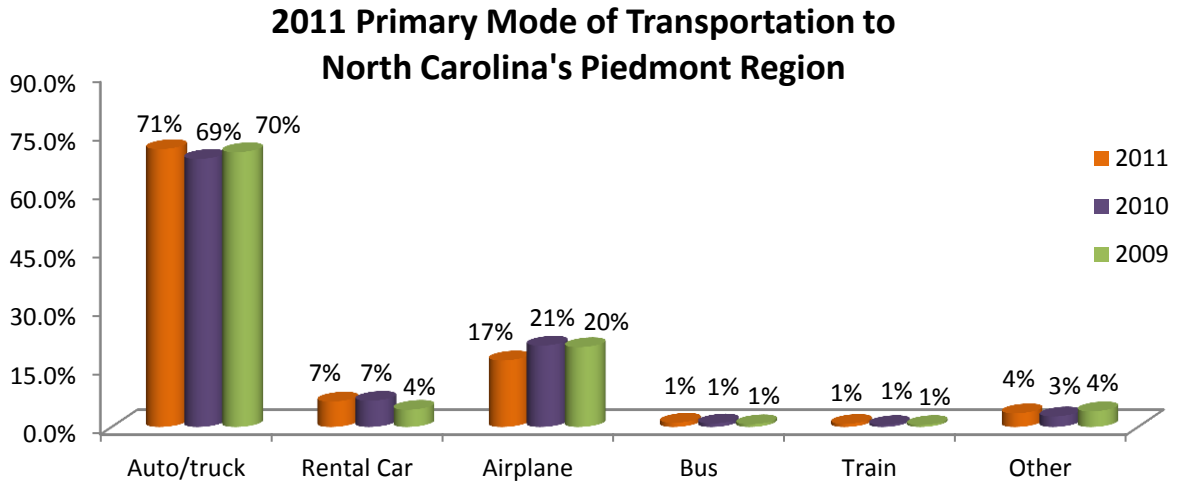
The majority of overnight visitors to the Piedmont Region in 2011 stayed either in a hotel/motel (50.0%) or a private home (48.0%). The remaining stayed in a B&B (1.0%), condo (2.0%), timeshare (1.5%), RV/tent (2.1%) or other (3.9%). It should be noted that some visitors use more than one type of accommodation during a visit, so totals equal more than 100%.



\*percentages add to more than 100% due to multiple responses.

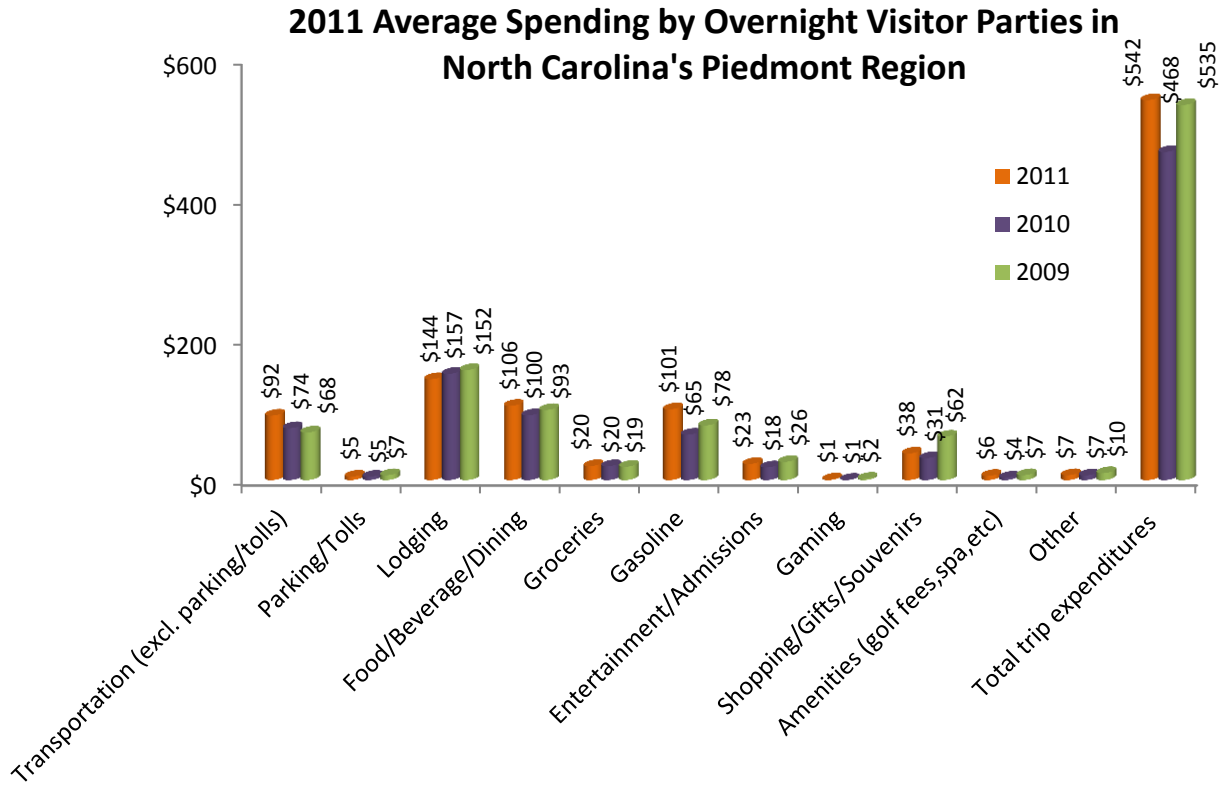
### Mode of Transportation

In 2011, the personal auto was most used form of transportation (71%) to the Piedmont Region, however seventeen percent traveled by air.



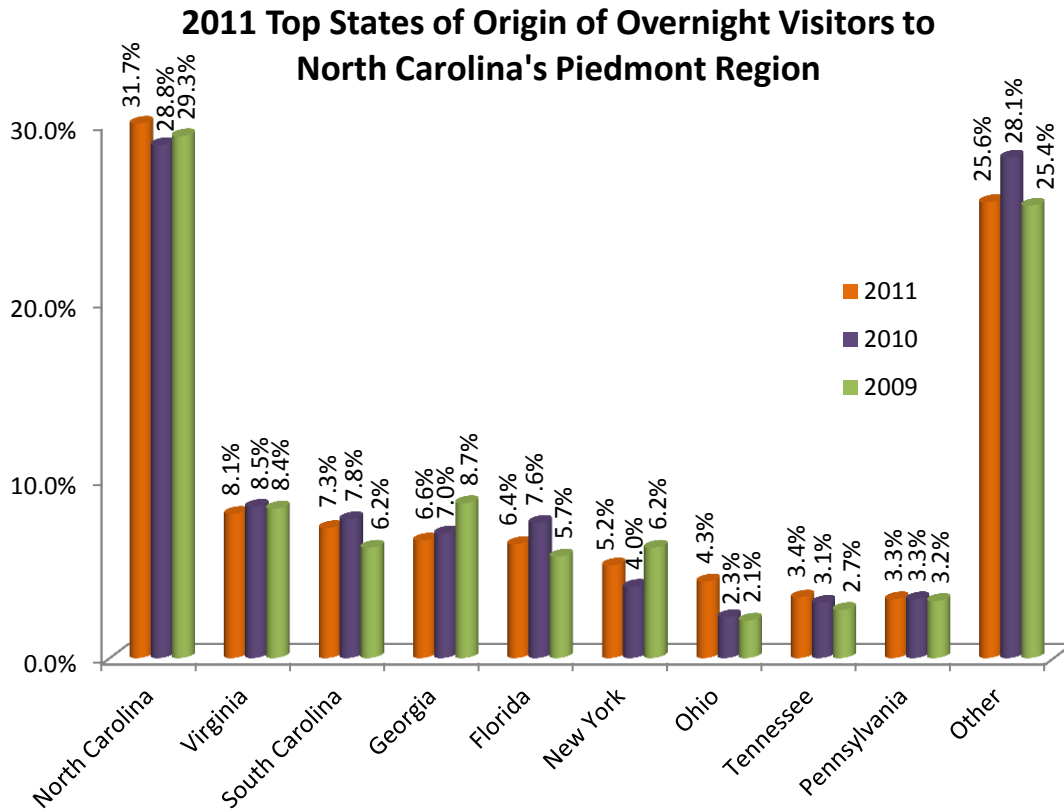
## Amount Spent in Piedmont Region

The average overnight visitor party spending in the Piedmont Region was \$542, up from \$468 in 2009.



## Origin of Visitors

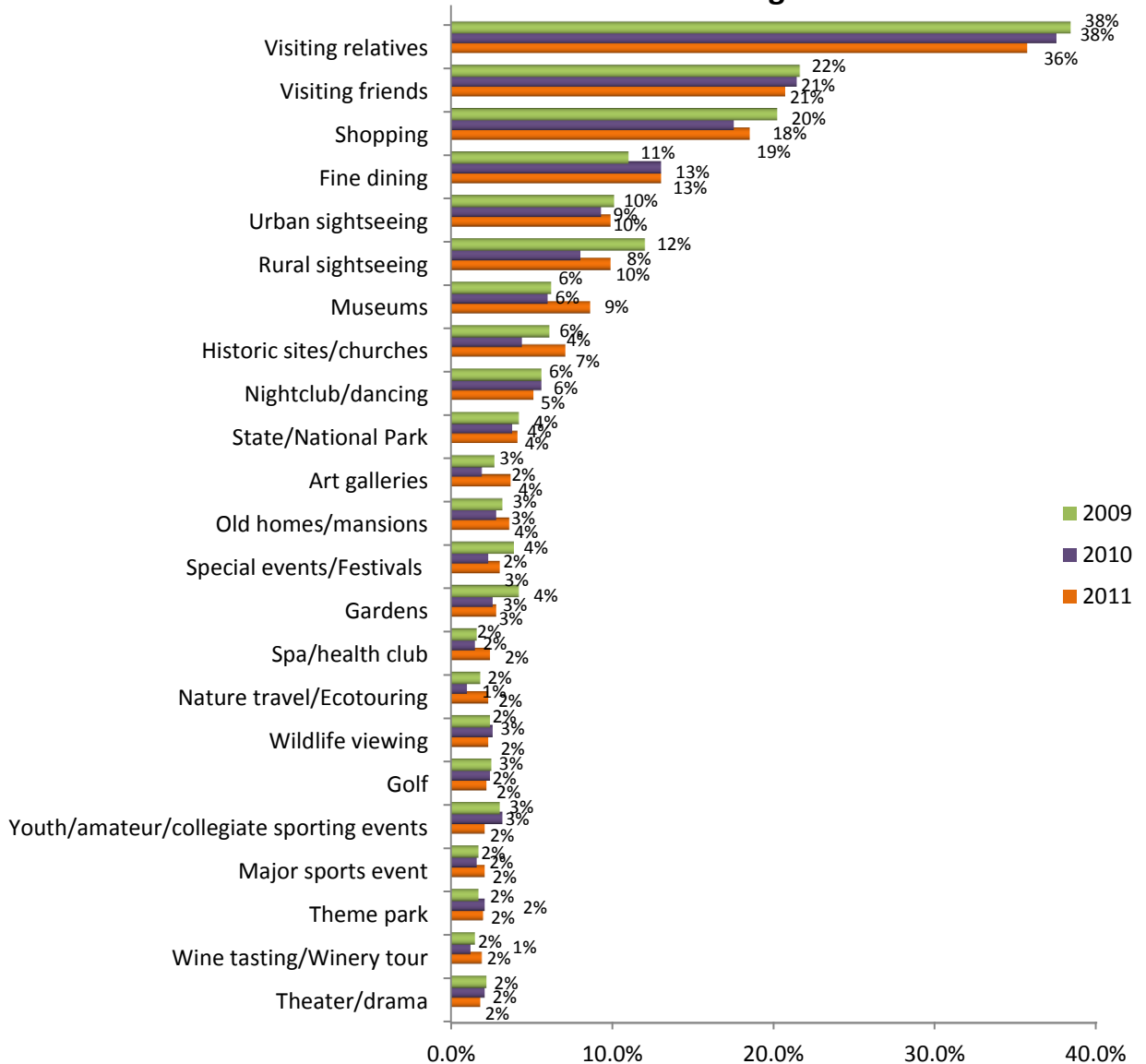
In 2011, the top states of origin for Piedmont Region overnight visitors included North Carolina (31.7%), Virginia (8.1%), South Carolina (7.3%), Georgia (6.6%), Florida (6.4%), New York (5.2%), and Ohio (4.3%). The proportion of in-state visitors to the Piedmont Region grew from 29% in 2010 to 32% in 2011.



## Activities

Over one-third (36%) of the overnight visitors to North Carolina’s Piedmont Region visited relatives while visiting the region. Just over twenty percent (21%) visited friends and nearly that many shopped (19%). Other popular activities included fine dining (13%), rural sightseeing (10%), urban sightseeing (10%), and museums (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.**

2011 Activities Participated in by Overnight Visitors to North Carolina's Piedmont Region



## **Demographic Profile of North Carolina Overnight Visitors to the Piedmont Region**

The North Carolina Piedmont Region overnight visitor gender breakdown is fifty-nine percent female and forty-one percent male. More than half (57.1%) of the visitors are married and just about nineteen 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 (77.8%), and fifteen percent classify themselves as black/African American.

Over one-half (50.5%) of Piedmont Region overnight visitor parties have a household head with a college degree or higher. The average Piedmont Region visitor is 45 years old, with almost one-half (48.8%) being 45 years old or older.

Nearly one-half (45.1%) of the visitor parties that traveled to North Carolina's Piedmont Region in 2011 had a household income \$75,000 or over. Fourteen percent had a household income of over \$125,000.

## 2011 Top Advertising Markets

In 2011, the top advertising markets sending overnight visitors to **North Carolina's Piedmont Region** were Raleigh-Durham-Fayetteville (8.4%), Charlotte (7.9%), Greensboro-High Point-Winston Salem (5.2%), and Atlanta (4.9%). Advertising markets correspond with Nielsen's Designated Market Areas (DMAs).

### Top Advertising Markets of Origin for *Overnight* Piedmont Region Visitors

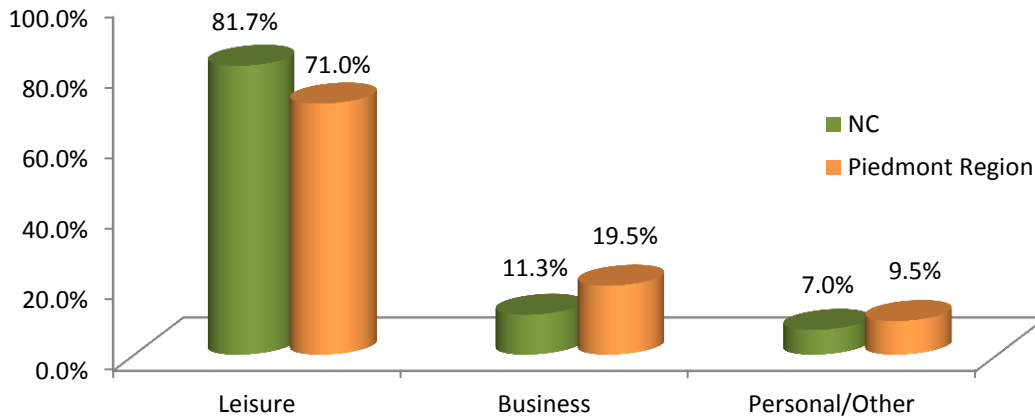
<i>DMA of Origin</i>	<i>2011 % of Total Visitors to Piedmont Region</i>	<i>2010 % of Total Visitors to Piedmont Region</i>	<i>2009 % of Total Visitors to Piedmont Region</i>	<i>2011 Piedmont Market Share of NC Visitors from DMA</i>	<i>2010 Piedmont Market Share of NC Visitors from DMA</i>	<i>2009 Piedmont Market Share of NC Visitors from DMA</i>
Charlotte	11.6%	7.9%	7.2%	35.0%	42.6%	37.9%
Raleigh-Durham (Fayetteville)	10.4%	8.4%	9.2%	25.6%	28.9%	36.2%
Greensboro-High Point-Winston Salem	5.3%	5.2%	5.7%	22.6%	39.5%	35.0%
New York, NY	5.1%	4.6%	5.5%	34.4%	45.5%	55.8%
Greenville-New Bern-Washington	4.6%	3.4%	3.7%	32.6%	40.2%	43.4%
Atlanta	4.3%	4.9%	6.4%	22.0%	53.3%	54.4%
Norfolk-Portsmouth-Newport News	4.0%	1.6%	1.8%	43.9%	26.7%	24.3%
Greenville-Spartanburg-Asheville-Anderson	3.3%	4.5%	2.7%	25.3%	48.4%	24.3%
Washington DC (Hagerstown, MD)	3.2%	4.5%	5.8%	26.8%	51.7%	51.4%
Wilmington	2.4%	2.2%	2.2%	36.6%	48.8%	59.5%
Orlando-Daytona Beach-Melbourne	2.0%	2.2%	1.9%	35.3%	48.8%	50.0%
Roanoke-Lynchburg	1.9%	1.9%	2.6%	35.3%	45.0%	55.6%
Baltimore	1.8%	1.3%	1.5%	42.3%	52.0%	50.0%
Myrtle Beach-Florence	1.8%	1.9%	1.6%	35.5%	67.9%	45.5%
Richmond-Petersburg, VA	1.7%	2.0%	1.2%	28.9%	45.2%	32.4%
Tampa-St. Petersburg (Sarasota)	1.6%	1.7%	1.1%	22.7%	38.6%	39.3%
Philadelphia	1.5%	2.6%	2.3%	22.0%	43.9%	48.9%

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

## 2011 Piedmont Region versus North Carolina

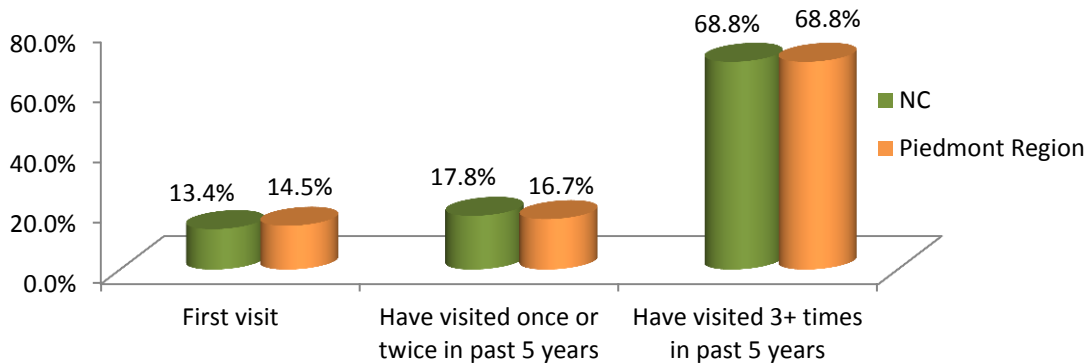
North Carolina’s Piedmont Region had a smaller share of visitors travel to the region for leisure reasons than North Carolina as a state (82% North Carolina vs. 71% Piedmont Region). At the same time, North Carolina’s share of business/convention travelers was smaller than the proportion for the Piedmont Region (11% North Carolina vs. 20% Piedmont Region).

### 2011 Primary Purpose of Trip North Carolina vs. Piedmont Region



The proportions of repeat and first time visitors to the Piedmont Region mirror those of North Carolina’s visitors in general.

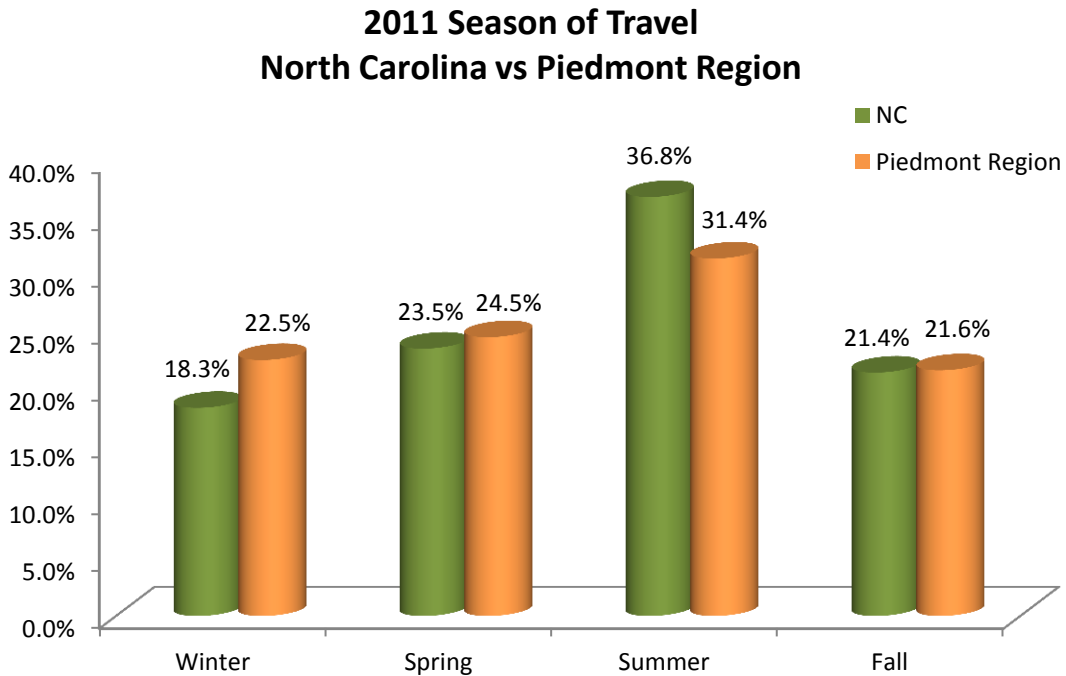
### 2011 First Time vs. Repeat Visitors North Carolina vs. Piedmont Region





## Travel Volume by Season

During the summer season (June through August) the state as a whole had a larger percentage of overnight visitors than the Piedmont Region, while the Piedmont Region had higher percentages of visitors in the winter and spring seasons. The fall season attributed approximately the same proportion of visitors to the state and piedmont.



## Average Length of Stay

In 2011, an average of 3.4 nights were spent by visitors to North Carolina’s Piedmont Region, just less than the average by North Carolina overnight travelers in general (3.5).

## Travel Party Size

The average travel party size for all Piedmont Region overnight visitors was 1.9 people, slightly smaller than the average party size of the North Carolina visitor of 2 people.

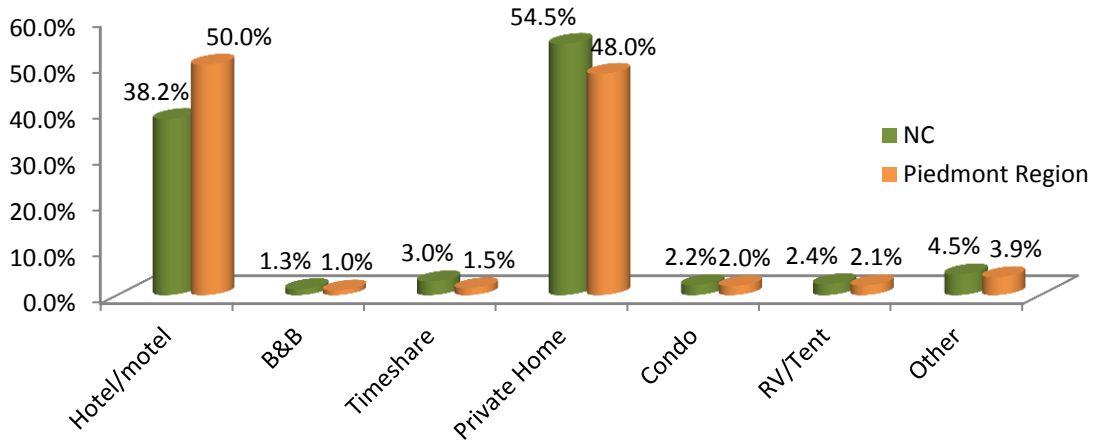
## Children on Trip

Twenty-five percent of overnight visitor parties to the Piedmont Region included children. Twenty-eight percent of overnight North Carolina visitor parties included children.

## Lodging Type

Both Piedmont Region overnight visitors and North Carolina visitors in general are more likely to stay in a private home or hotel/motel than other types of lodging. Half of the Piedmont Region visitors stay in hotel/motels.

**2011 Lodging by Overnight Visitors to North Carolina vs. Piedmont Region**

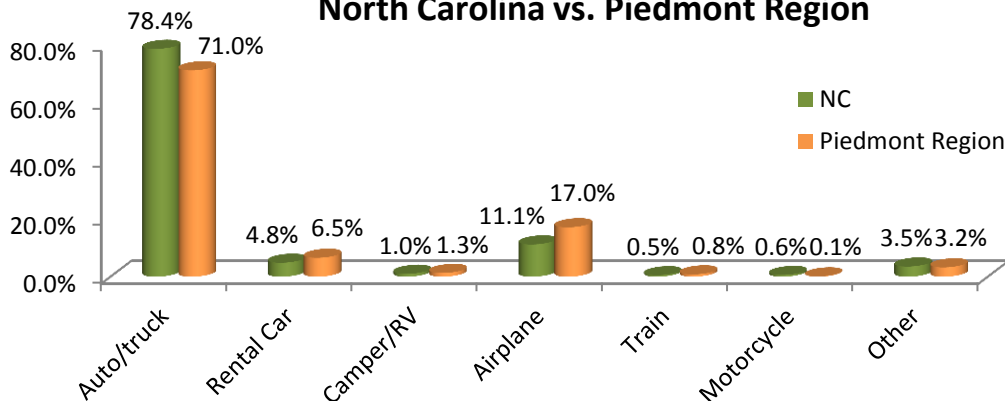


\*percentages add to more than 100% due to multiple responses.

## Mode of Transportation

A higher percentage of travelers to the Piedmont Region flew to their destination than all North Carolina visitors (11% North Carolina vs. 17% Piedmont Region), while a higher percentage of travelers to North Carolina drove to their destination than Piedmont Region visitors (78% North Carolina vs. 71% Piedmont Region).

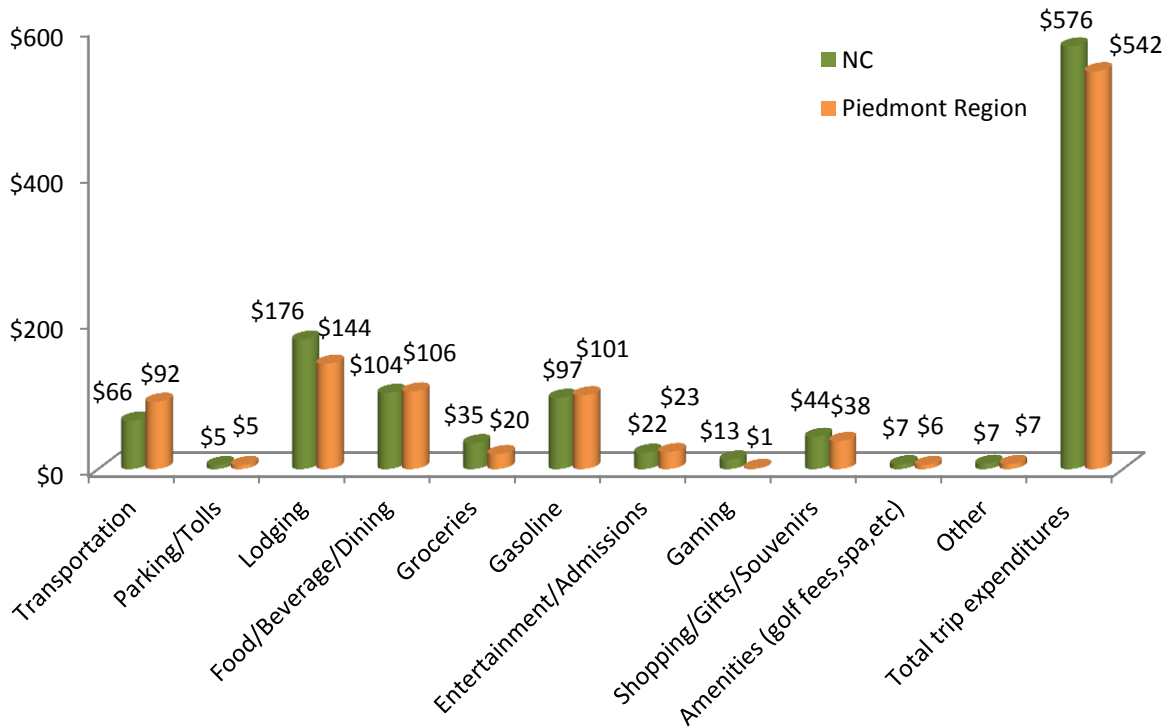
**2011 Primary Transportation by Overnight Visitors North Carolina vs. Piedmont Region**



## Amount Spent in Piedmont Region

The average overnight visitor party spending in the Piedmont Region was \$542, slightly lower than the state average party spending of \$576. Piedmont Region visitors spent more on transportation than visitors statewide.

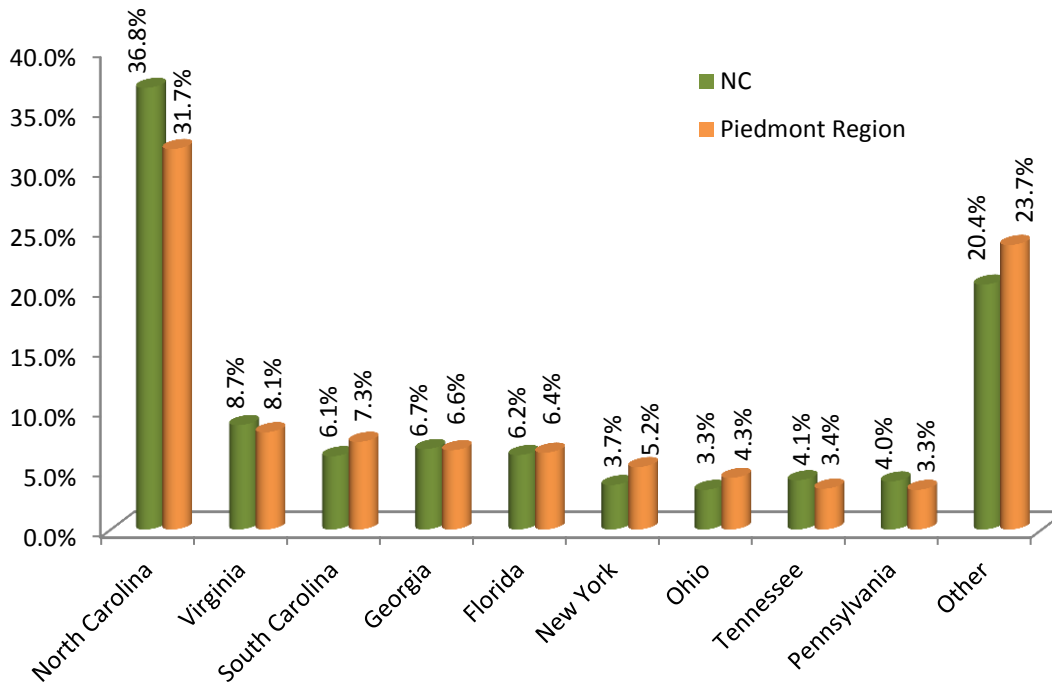
**2011 Average Spending by Overnight Visitor Parties  
North Carolina vs. Piedmont Region**



## Origin of Overnight Visitors

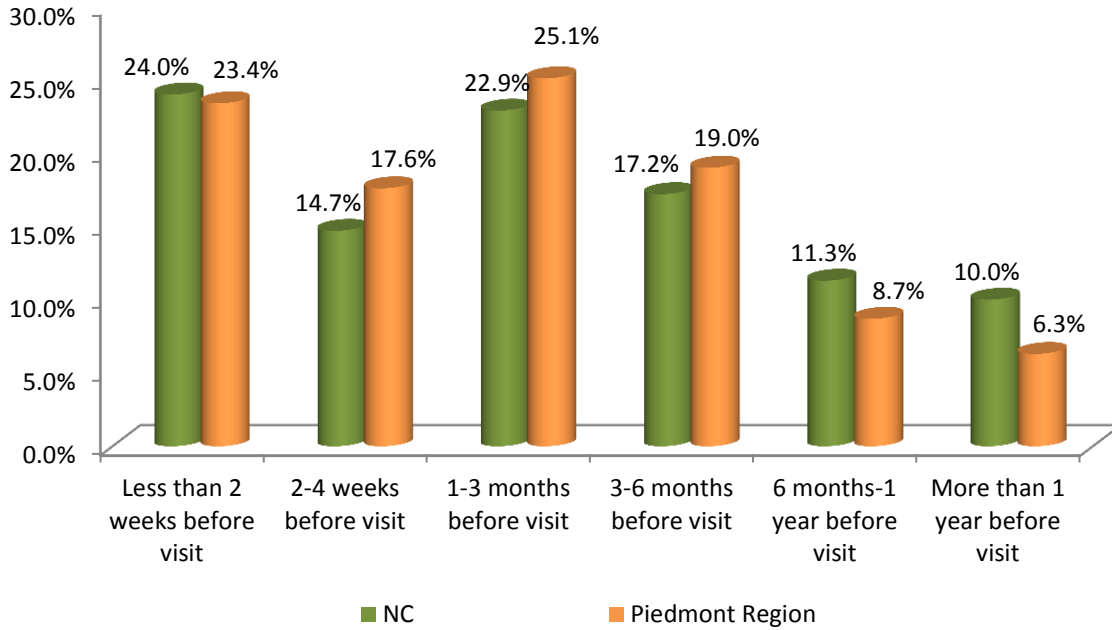
The top states of origin for the state and the Piedmont Region were similar in 2011, with only slight variances between states. The Piedmont Region saw a higher percentage of non-resident visitors than the state as a whole.

**2011 Top States of Origin of Overnight Visitors  
North Carolina vs. Piedmont Region**



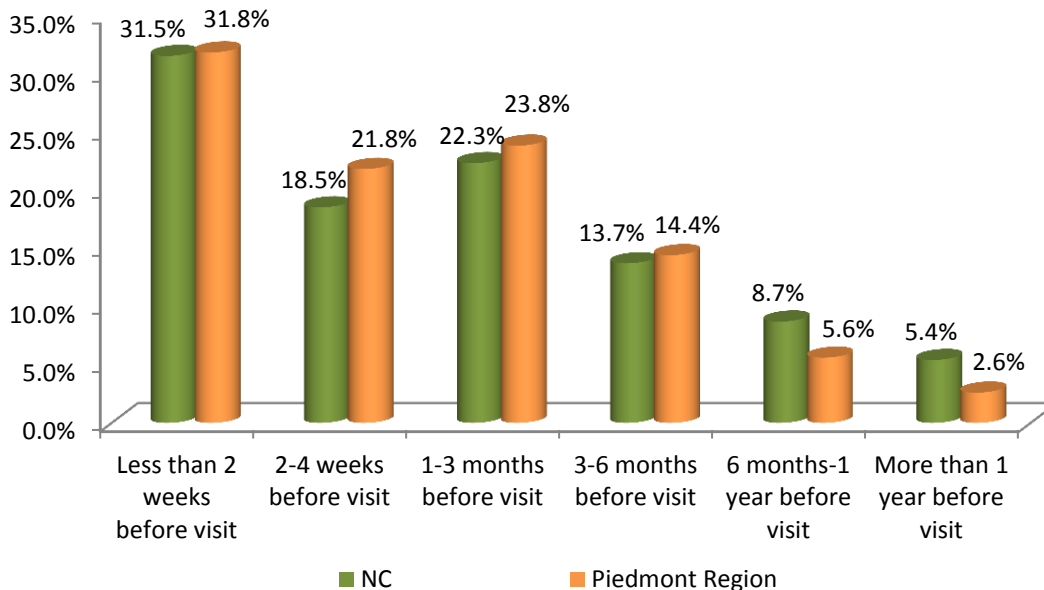
## Trip Planning

2011 Length of Time to *Consider* NC as Travel Destination



Piedmont Region visitors have shorter lead times for consideration and decision of travel than North Carolina visitors in general. Over forty percent of Coastal Region visitors considered the state one month or less ahead of travel, and over fifty percent decided to visit less than one month prior to travel.

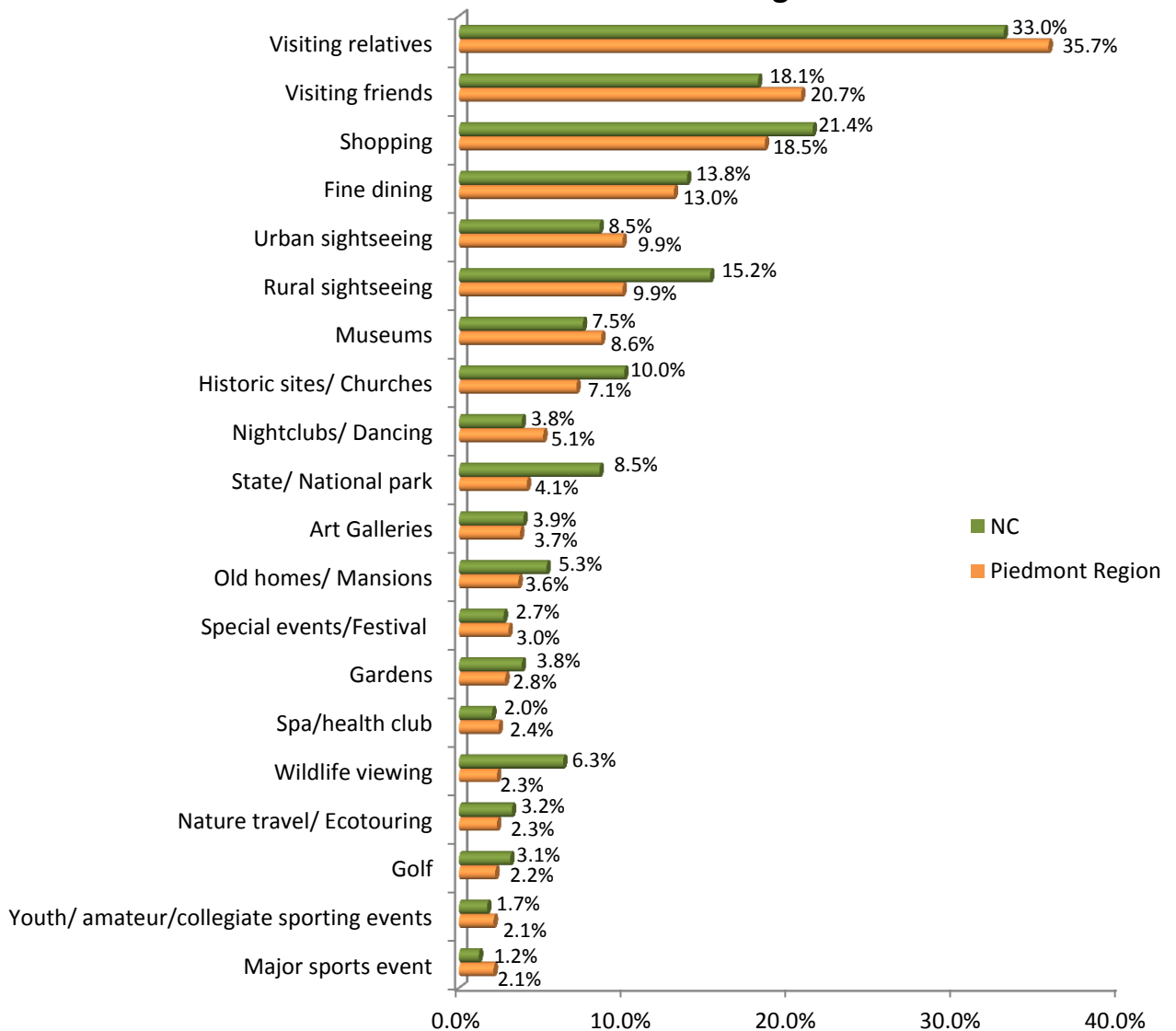
2011 Length of Time *Decide* on NC as Travel Destination



## Activities

Compared to all North Carolina overnight travelers, the Piedmont Region had a larger share of visitors who visited relatives (33% North Carolina vs. 36% Piedmont Region) and friends (18% North Carolina vs. 21% Piedmont Region). The region also had a larger proportion of visitors participated in urban sightseeing (9% North Carolina vs. 10% Piedmont Region). **\*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.**

**2011 Activities Participated in by Overnight Visitors  
North Carolina vs. Piedmont Region**



## 2011 Demographic Profile for Overnight Visitor Parties to the Piedmont Region

	<b>North Carolina</b>	<b>Piedmont Region</b>
<b>Average age of household head</b>	45.9 years of age	45.2 years of age
<b>Education of Household Head</b>		
High school or less	16.2%	15.7%
Some college - no degree	23.1%	20.9%
Completed college	40.5%	42.9%
Post Graduate College	20.2%	20.5%
<b>Annual Household Income</b>		
Less than \$25,000	13.3%	14.4%
\$25,000-\$49,999	23.1%	22.0%
\$50,000-\$74,999	20.9%	18.6%
\$75,000 & over	42.4%	45.1%
<b>Marital Status</b>		
Married	61.5%	57.1%
Never married	20.3%	23.4%
Divorced, widowed, separated	18.2%	19.4%
<b>Ethnicity</b>		
White	83.2%	77.8%
Black/African American	10.8%	14.5%
Asian or Pacific Islander	2.2%	2.8%
Other	3.8%	5.0%

## 2011 Top Advertising Markets

While the top ten advertising markets sending visitors to North Carolina’s Piedmont Region are very similar to the top ten advertising markets for the state of North Carolina, there are visitor shares from advertising markets that differ; such as Raleigh-Durham (12% North Carolina vs. 10% Piedmont Region).

### Top Advertising Markets of Origin for 2011 Overnight Piedmont Region Visitors VS. North Carolina Visitors

<i>DMA of Origin</i>	<i>Percent of Total Visitors to Piedmont Region</i>	<i>Percent of Total Visitors to North Carolina</i>
Charlotte	11.6%	9.5%
Raleigh-Durham (Fayetteville)	10.4%	11.7%
Greensboro-High Point-Winston Salem	5.3%	6.8%
New York	5.1%	4.3%
Greenville-New Bern-Washington	4.6%	4.0%
Atlanta	4.3%	5.5%
Norfolk-Portsmouth-Newport News	4.0%	2.7%
Greenville-Spartanburg-Asheville	3.3%	3.7%
Washington DC (Hagerstown, MD)	3.2%	3.3%
Wilmington	2.4%	1.9%
Orlando-Daytona Beach-Melbourne	2.0%	1.6%
Roanoke-Lynchburg	1.9%	1.6%
Baltimore	1.8%	1.2%
Myrtle Beach-Florence	1.8%	1.5%
Richmond-Petersburg	1.7%	1.8%
Tampa-St. Petersburg	1.6%	2.0%
Philadelphia, PA	1.5%	1.9%

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



## 2011 Domestic Mountain Region Travel

### Summary

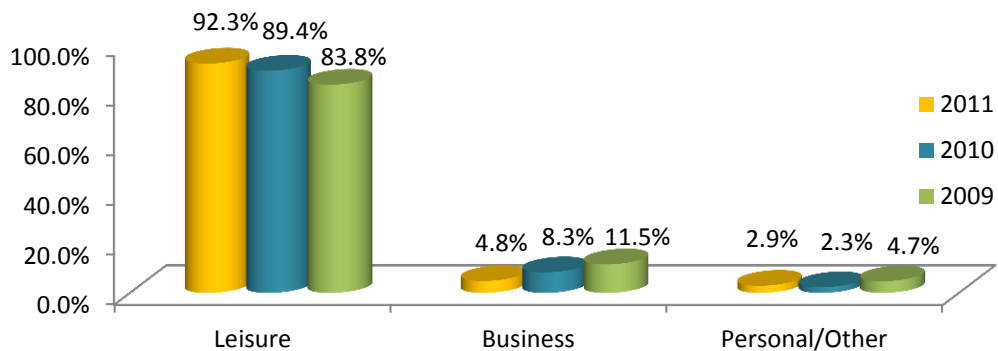
- ◆ In 2011, nineteen percent of North Carolina visitors traveled to North Carolina’s Mountain Region, approximately 8.6 million person-trips. For marketing purposes, the Mountain Region is made up of the 23 western-most counties of North Carolina.
- ◆ Ninety percent of domestic visitors came to the Mountain Region for pleasure purposes, while five percent of visitors came to conduct business (includes meeting/convention). The remaining five percent reported personal business or “other” purpose of visit.
- ◆ Travel to the Mountain Region of North Carolina was heaviest in the summer and fall. The summer (June - August) had the highest proportion of visitors, with thirty-four percent of all 2011 Mountain Region visitors. Fall followed with twenty-six percent of visitors (September - November), followed by spring (March - May) with twenty-four percent and winter (December - February) with sixteen percent. August was the single largest month for mountain travel with thirteen percent.
- ◆ Overnight visitors to the Mountain Region spent an average of 3.4 nights in the region.
- ◆ Fifty-three percent of Mountain Region visitors lodged in a hotel/motel while thirty-nine percent stayed at a private home. Seven percent stayed in an RV park/campground.
- ◆ The average travel party size for all Mountain Region visitors was 2.1 people. Twenty-four percent of travel parties to the region included children in the party.
- ◆ Ninety-three percent of all travelers to the Mountain Region drove (includes personal automobile, rental vehicle, RV/camper), while five percent traveled by air.
- ◆ In 2011, the average trip expenditure in the Mountain Region was \$558. The average trip expenditure for overnight visitors to the Mountain Region was \$683. Daytrip parties to the Mountain Region spent approximately \$191 per visit.
- ◆ The top states of origin of *overnight* visitors to the Mountain Region were North Carolina (33.6%), Georgia (10.4%), Florida (9.5%), Tennessee (8.9%), South Carolina (6.9%) and Virginia (4.2%).
- ◆ Sixty-three percent of the households that traveled to North Carolina’s Mountain Region in 2011 had a household income over \$50,000.
- ◆ In 2011, Charlotte, NC (10.4%) was the top DMA of origin for *overnight* travelers to the Mountain Region, followed by Raleigh/Durham/Fayetteville (9.8%), Greensboro/High Point/Winston-Salem (8.6%), Atlanta (7.9%), Knoxville (5.3%) and Greenville/Spartanburg, SC/Asheville (5.0%).

## Mountain Region Overnight Visitor Profile

### Main Purpose of Visit

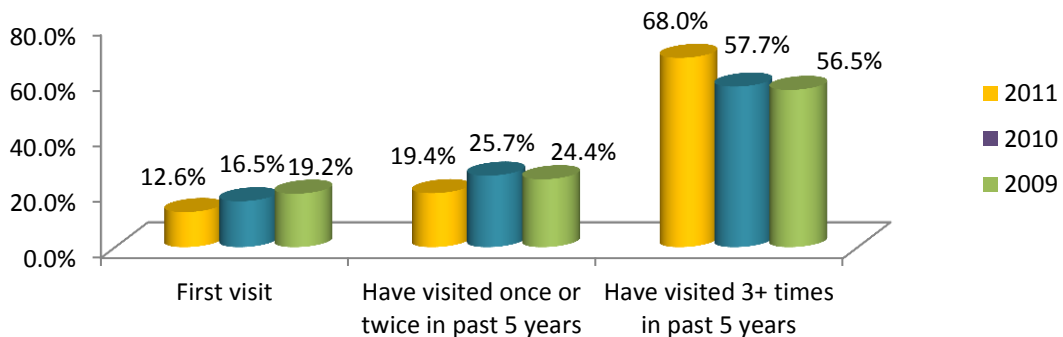
In 2011, over ninety percent (92.3%) of domestic overnight visitors came to the Mountain Region for leisure purposes, which included visiting friends and relatives, outdoor recreation and entertainment/sightseeing, an increase from 89% in 2010. Nearly five percent (4.8%) of domestic overnight visitors came for general business, convention, seminar or other group meeting, while three percent traveled to the Mountain Region to conduct personal or “other” business.

**2011 Primary Purpose of Overnight Trip to North Carolina's Mountain Region**



The proportion of visitors to North Carolina’s Mountain Region who have traveled to the state more than three times in the last five years increased from 58% to 68% from 2010 to 2011, while first time visitors slipped to 12.6%.

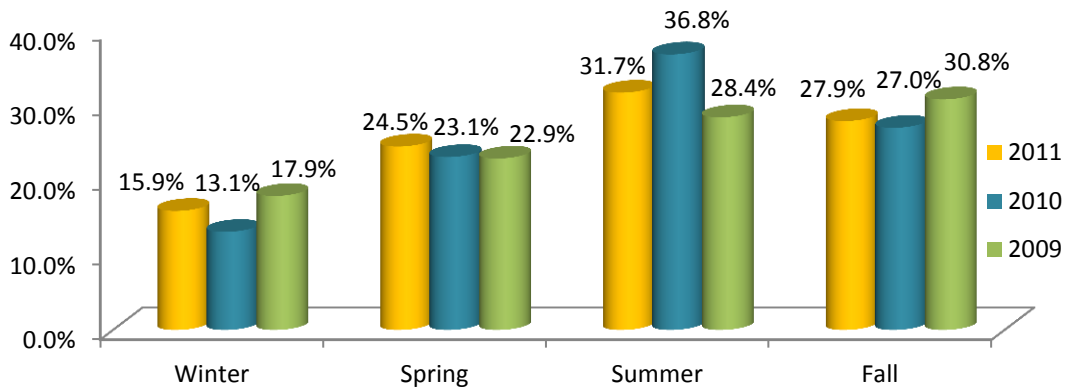
**2011 First Time vs. Repeat Visitors to North Carolina's Mountain Region**



## Travel Volume by Season

When examining visitation based on the typical seasonal schedule, the summer, (June through August) with nearly thirty-two percent, was the most popular season of the year for overnight travel to North Carolina’s Mountain Region. The fall (September through November) was next with twenty-eight percent, followed by spring (March through May) with twenty-five percent and winter (December through February) with sixteen percent.

### 2011 Overnight Travel by Season to North Carolina's Mountain Region



## Average Length of Stay

In 2011, an average of 3.4 nights was spent by visitors to North Carolina’s Mountain Region.

## Travel Party Size

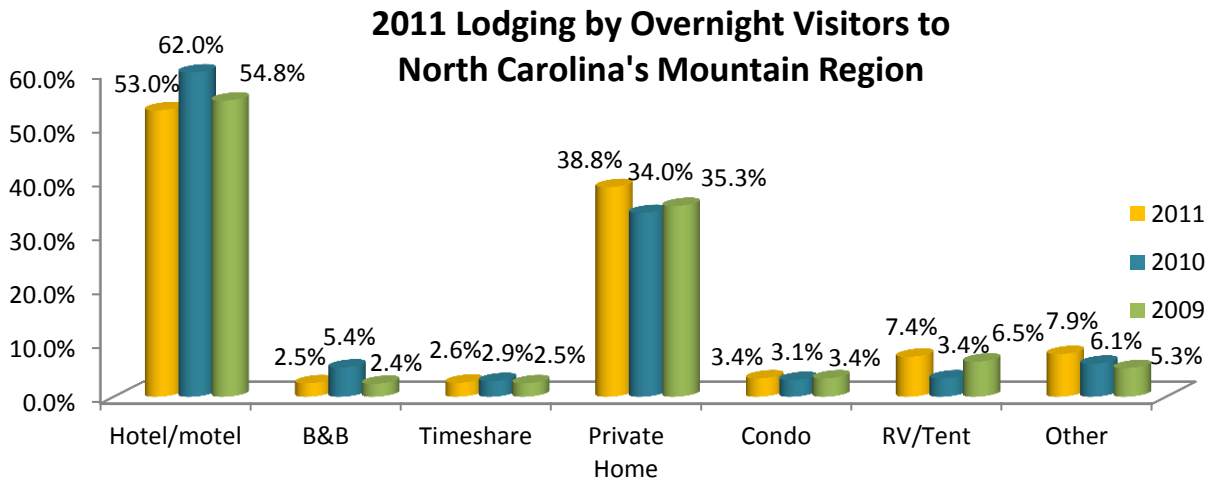
The average travel party size for Mountain Region overnight visitors was 2.0 people, down from 2.2 people in 2010, and down from an average party size of 2.6 in 2009.

## Children on Trip

Twenty-four percent of overnight visitor parties to the Mountain Region included children, down from thirty percent in 2010 (explaining the shift in total party size). Among those who traveled with children, the average number of children on trips was 1.7.

## Lodging Used in Mountain Region

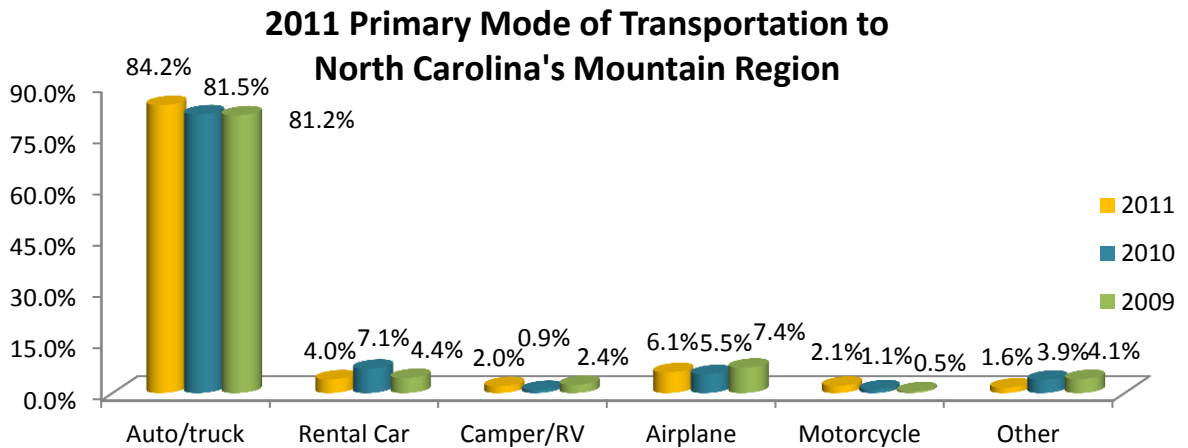
In 2011, over half of Mountain Region visitors stayed in a hotel/motel (53.0%), down from sixty-two percent in 2010. Thirty-nine percent lodged in a private home and over seven percent stayed in a RV/Tent (up from 3% in 2010).



\*percentages do not add to 100% due to multiple responses.

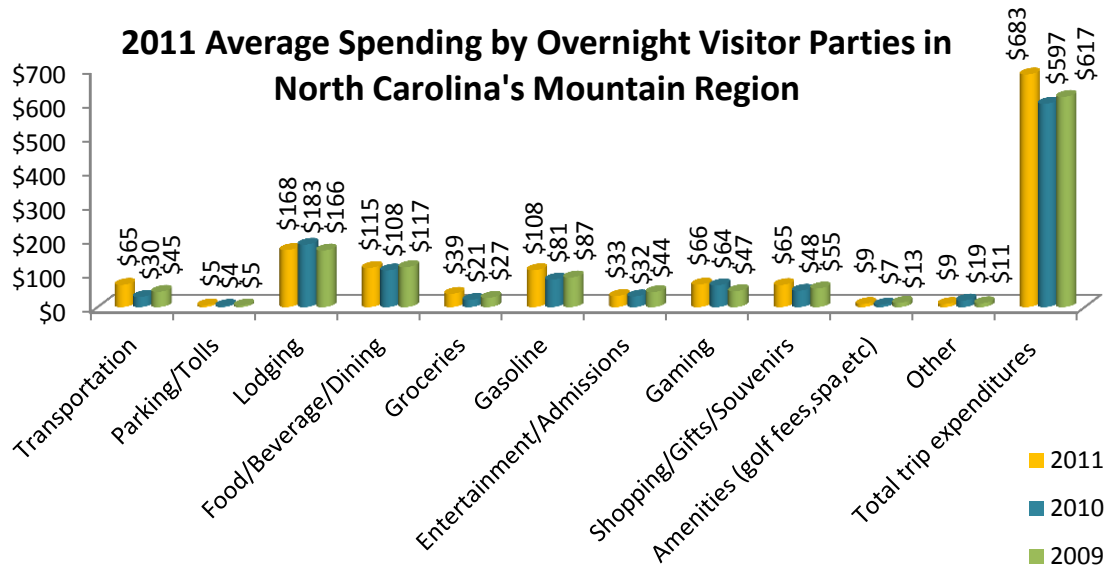
## Mode of Transportation

In 2011, the personal auto was by far the dominant form of transportation (84.2%) to the Mountain Region, while over six percent traveled by air.



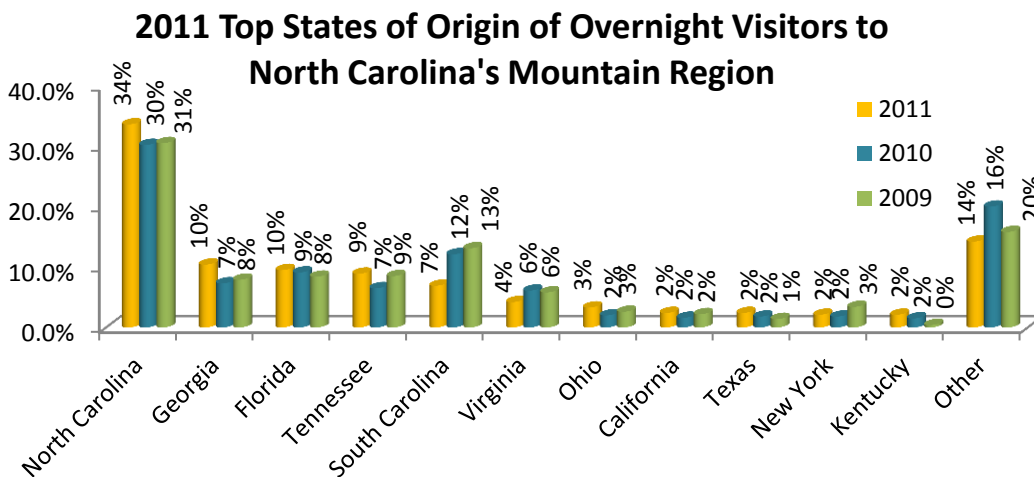
### Amount Spent in Mountain Region

The average overnight visitor party spending in the Mountain Region was \$683, up nearly \$100 from \$597 in 2010. Data shows that spending in most categories increased, with the exception of lodging. However, data shows that more Mountain Region visitors stayed in a private home, thereby possibly reducing cost of lodging per visit.



### Origin of Visitors

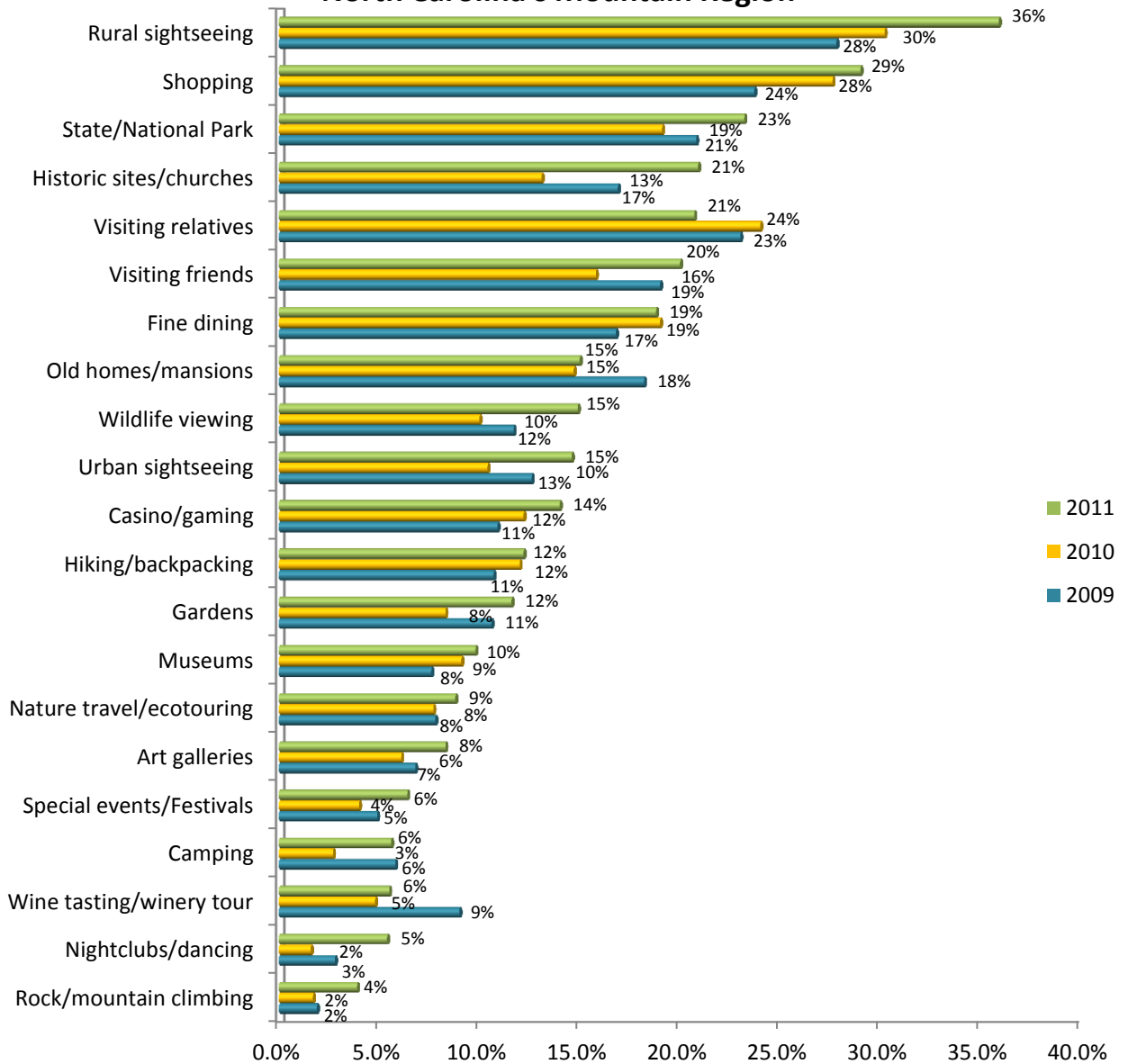
In 2011, the top states of origin for Mountain Region overnight visitors included North Carolina (33.6%), Georgia (10.4%), Florida (9.5%), and Tennessee (8.9%).



## Activities

The proportion of Mountain Region visitors who participated in rural sightseeing (30% in 2010 vs. 36% in 2011), visited a state or national park (19% in 2010 vs. 23% in 2011) and visited historic sites/churches (13% in 2010 vs. 21% in 2011) increased from 2009-2010. **\*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.**

**2011 Activities Participated in by Overnight Visitors to North Carolina's Mountain Region**



## **2011 Demographic Profile of North Carolina Overnight Visitors to the Mountain Region**

The North Carolina Mountain Region overnight visitor gender breakdown is fifty-nine percent female and forty-one percent male. More than half (61.3%) of the visitors are married and just under one-fifth of the region's visitors are divorced, widowed or separated.

The largest proportion of North Carolina Mountain Region overnight visitors classify themselves as white (88.9%), and just over four percent classify themselves as black/African American.

Over two-thirds (69.9%) of Mountain Region overnight visitor parties have a household head with a college degree or higher. The average Mountain Region visitor is 47 years old, with over half (56.1%) being 45 years old or older.

Forty-two percent of the visitor parties that traveled to North Carolina's Mountain Region in 2011 had a household income \$75,000 or over. Thirteen percent had a household income of over \$125,000.

## 2011 Top Advertising Markets

In 2011, the top advertising markets sending overnight visitors to **North Carolina's Mountain Region** were Charlotte (10.4%), Raleigh-Durham (9.8%), Greensboro-High Point-Winston Salem (8.6%), Atlanta (7.9%) and Knoxville (5.3%). As compared to 2010, there was positive growth for the Mountain Region from the Atlanta market as well as the Knoxville market. South Carolina markets have shown two years of decreases. 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>2011 % of Total Visitors to Mountain Region</i>	<i>2010 % of Total Visitors to Mountain Region</i>	<i>2009 % of Total Visitors to Mountain Region</i>	<i>2011 Mountain Market Share of NC Visitors from DMA</i>	<i>2010 Mountain Market Share of NC Visitors from DMA</i>	<i>2009 Mountain Market Share of NC Visitors from DMA</i>
Charlotte	10.4%	10.6%	9.5%	18.7%	20.2%	18.7%
Raleigh-Durham (Fayetteville)	9.8%	10.8%	8.1%	14.4%	13.4%	10.7%
Greensboro-High Point-Winston Salem	8.6%	6.5%	6.7%	21.2%	17.8%	15.3%
Atlanta	7.9%	5.7%	6.6%	24.6%	22.2%	21.1%
Knoxville	5.3%	2.6%	4.8%	33.3%	34.6%	58.6%
Greenville-Spartanburg-Asheville-Anderson	5.0%	6.5%	11.4%	22.8%	25.3%	38.3%
Tampa-St. Petersburg (Sarasota)	3.6%	3.5%	2.1%	29.5%	27.3%	28.6%
Tri-Cities, TN-VA	2.3%	2.6%	2.5%	40.0%	52.9%	56.3%
Greenville-New Bern-Washington	2.1%	0.6%	0.7%	8.1%	2.4%	2.4%
Nashville	1.9%	1.2%	1.9%	46.7%	33.3%	31.8%
Boston (Manchester)	1.8%	0.2%	1.9%	25.9%	4.5%	28.0%
New York	1.6%	2.5%	3.2%	6.5%	9.1%	11.6%
Orlando-Daytona Beach-Melbourne	1.6%	0.8%	1.8%	17.6%	7.0%	19.4%
Columbia, SC	1.6%	3.1%	3.3%	17.1%	28.2%	35.3%
Birmingham	1.5%	0.3%	0.6%	50.0%	10.0%	22.2%

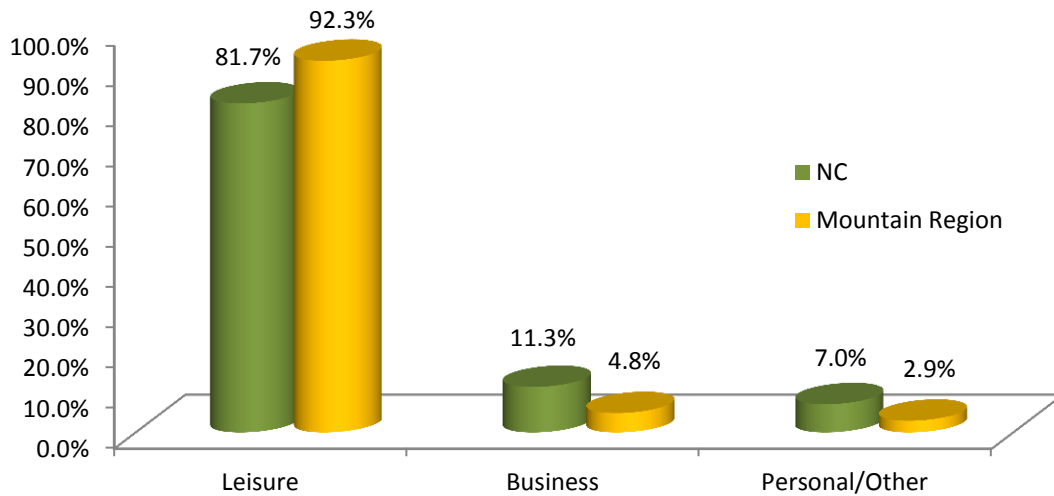
Note: Advertising markets defined by Nielsen's Designated Market Area (DMA)



## 2011 Mountain Region versus North Carolina

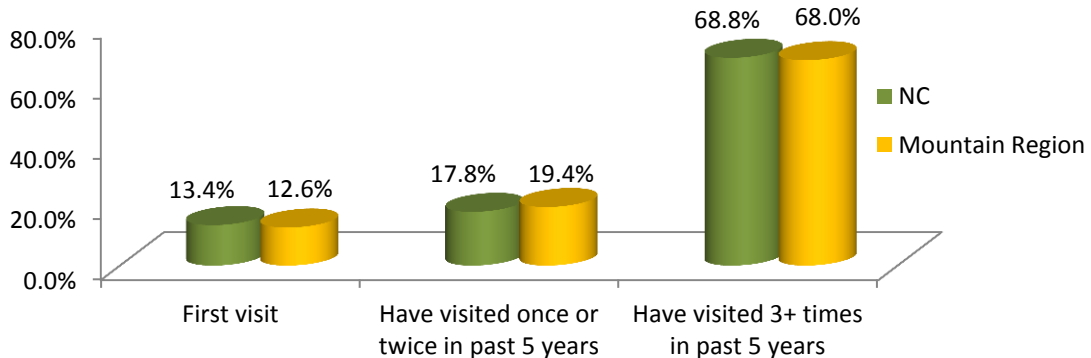
North Carolina’s Mountain Region had a slightly larger share of visitors travel to the region for leisure reasons than North Carolina as a state (82% North Carolina vs. 92% Mountain Region). This was higher than in 2010 (89%) for the Mountain Region.

### 2011 Primary Purpose of Trip North Carolina vs. Mountain Region



The proportions of repeat and first time visitors to the Mountain Region are similar to those of North Carolina’s visitors in general.

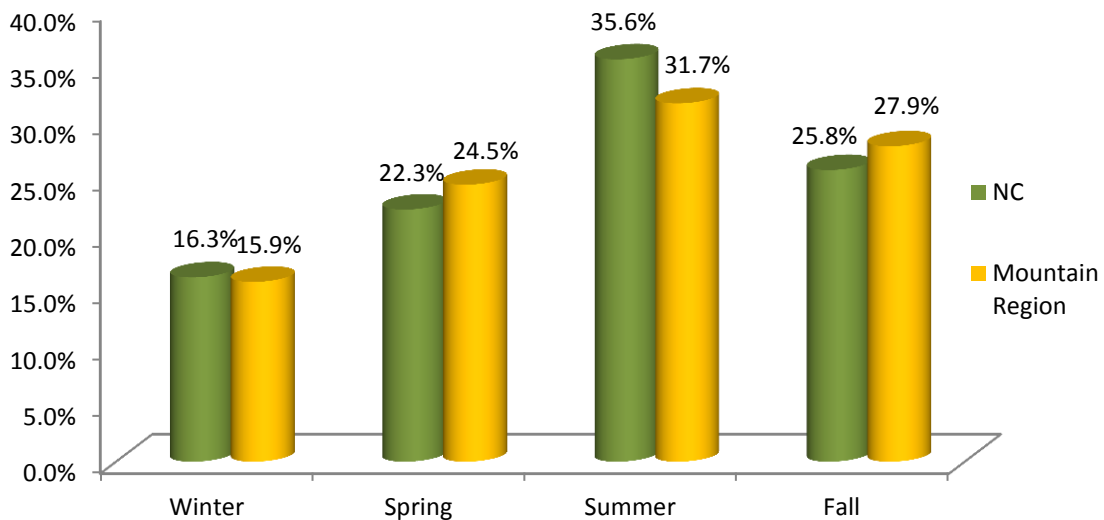
### 2011 First Time vs. Repeat Visitors North Carolina vs. Mountain Region



## Travel Volume by Season

In 2011, the summer season (June through August) was the top season of travel to the Mountain Region. The spring and fall seasons for the Mountain Region had higher percentages of overnight visitors than North Carolina as a whole, while North Carolina had higher percentages of visitors in the summer and winter seasons.

**2011 Season of Travel  
North Carolina vs. Mountain Region**



## Average Length of Stay

In 2011, an average of 3.4 nights was spent by visitors to North Carolina’s Mountain Region, while the North Carolina overnight visitor stayed an average of 3.5 nights.

## Travel Party Size

The average travel party size for all Mountain Region overnight visitors was 2 people, the same as the average party size of the North Carolina visitor party.

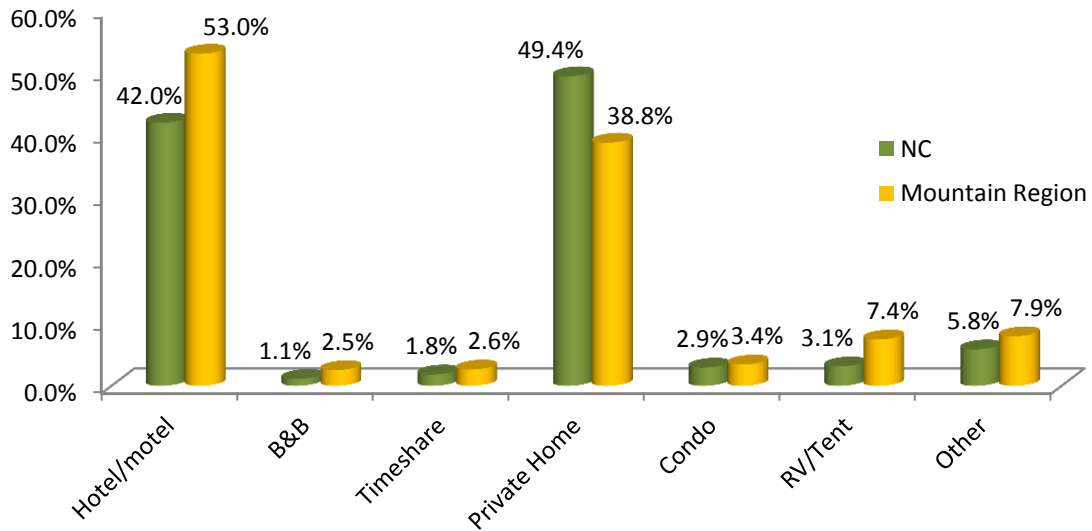
## Children on Trip

Twenty-four percent of overnight visitor parties to the Mountain Region included children in the party, while twenty-eight percent of visitors to the state included children.

## Lodging Type

Both Mountain Region overnight visitors and North Carolina visitors in general are more likely to stay in hotel/motel or a private home than other types of lodging. However, Mountain Region visitors have a much higher proportion for hotel/motel (42% North Carolina vs. 53% Mountain Region). The Mountain Region also saw a larger proportion of visitors who camp while visiting the state (3% North Carolina vs. 7% Mountain Region).

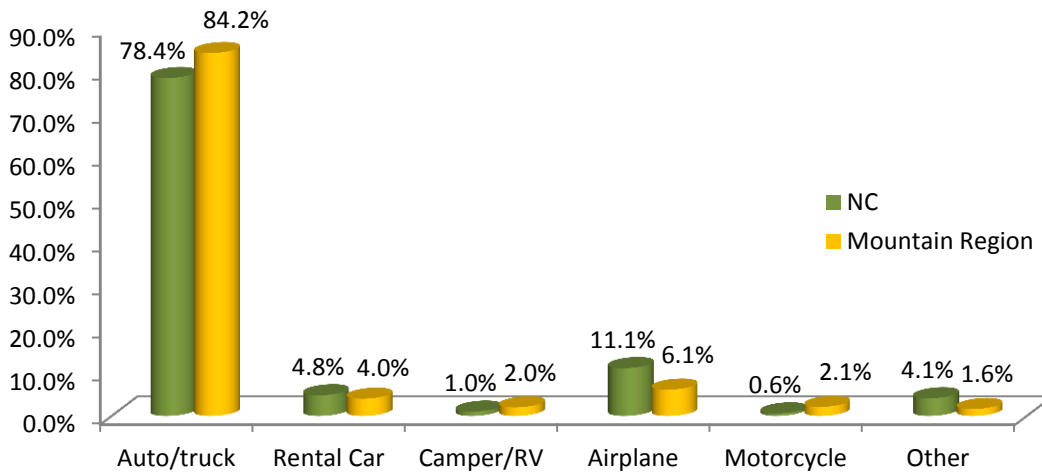
**2011 Lodging by Overnight Visitors to North Carolina vs. Mountain Region**



## Mode of Transportation

A higher percentage of travelers to the Mountain Region drove to their destination than all North Carolina visitors (78% North Carolina vs. 84% Mountain Region), while a higher percentage of travelers to North Carolina flew to their destination than Mountain Region visitors (11% North Carolina vs. 6% Mountain Region).

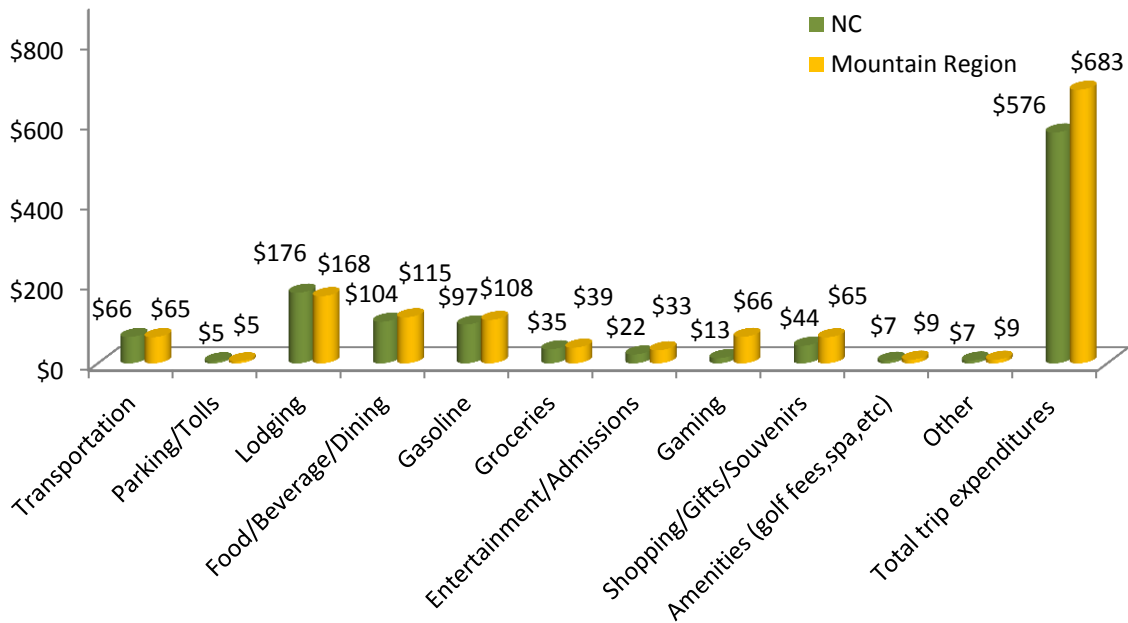
**2011 Primary Transportation by Overnight Visitors  
North Carolina vs. Mountain Region**



## Amount Spent in Mountain Region

The average overnight visitor party spending in the Mountain Region was \$683, over \$100 higher than the state average party spending of \$576. Length of stay was slightly longer for Mountain Region visitors than to the state as a whole, which would add to party spending, however, casino spending, food/beverage and entertainment expenses were also higher for Mountain Region visitors.

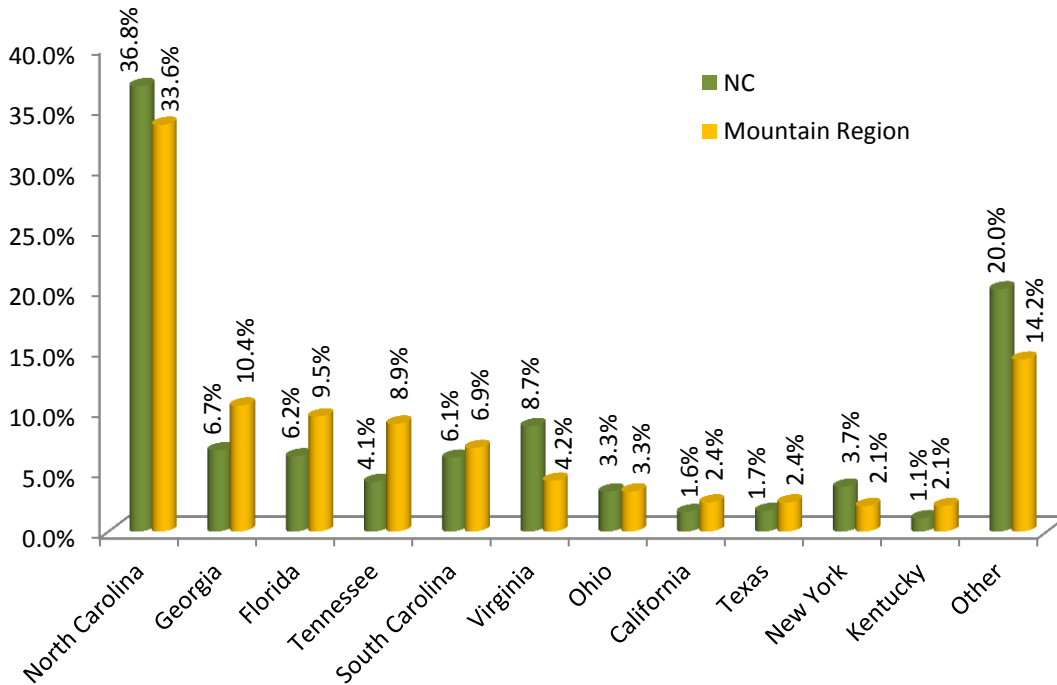
**2011 Average Spending by Overnight Visitor Parties  
North Carolina vs. Mountain Region**



## Origin of Overnight Visitors

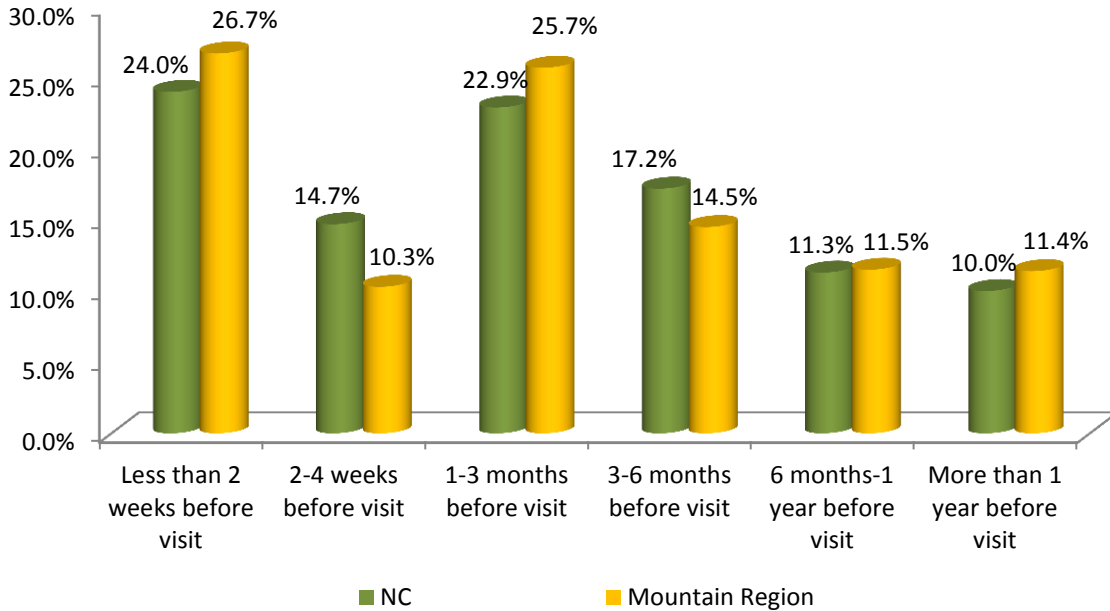
In 2011, the state saw a higher percentage of in-state visitors and Virginia residents than the Mountain Region; while the Mountain Region saw a larger proportion of visitors from Georgia, South Carolina, Tennessee, and Florida.

**2011 Top States of Origin of Overnight Visitors  
North Carolina vs. Mountain Region**



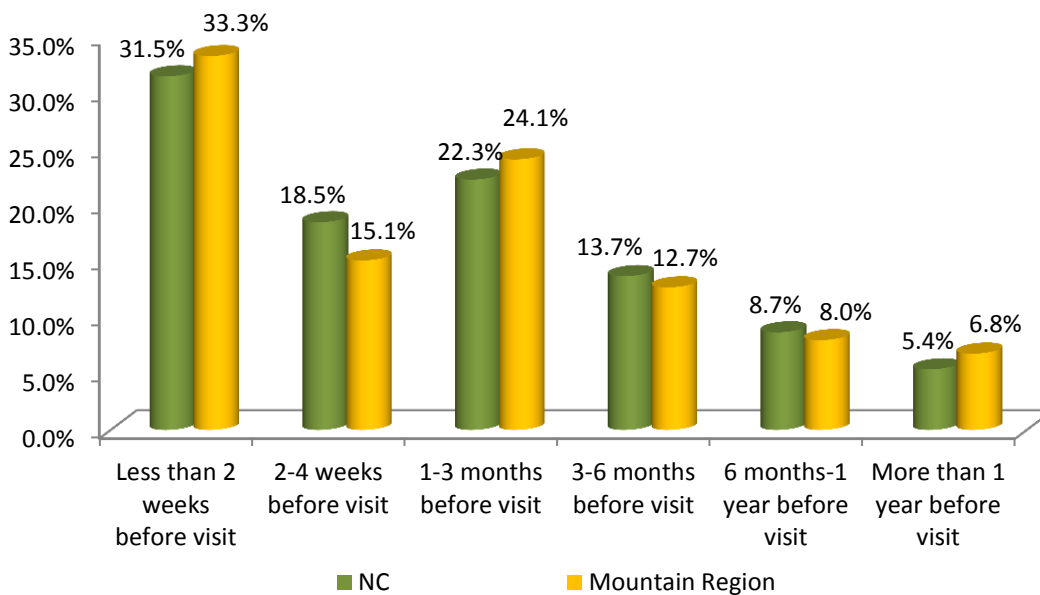
## Trip Planning

2011 Length of Time to *Consider* NC as Travel Destination



Mountain Region visitors have similar lead times for consideration and decision of travel to North Carolina visitors in general. Twenty seven percent of Coastal Region visitors *considered* the state less than two weeks ahead of travel, but over twenty percent *considered* the visit more than six months prior to travel. Decisions to make travel for Mountain Region visitors and NC visitors in general were nearly identical.

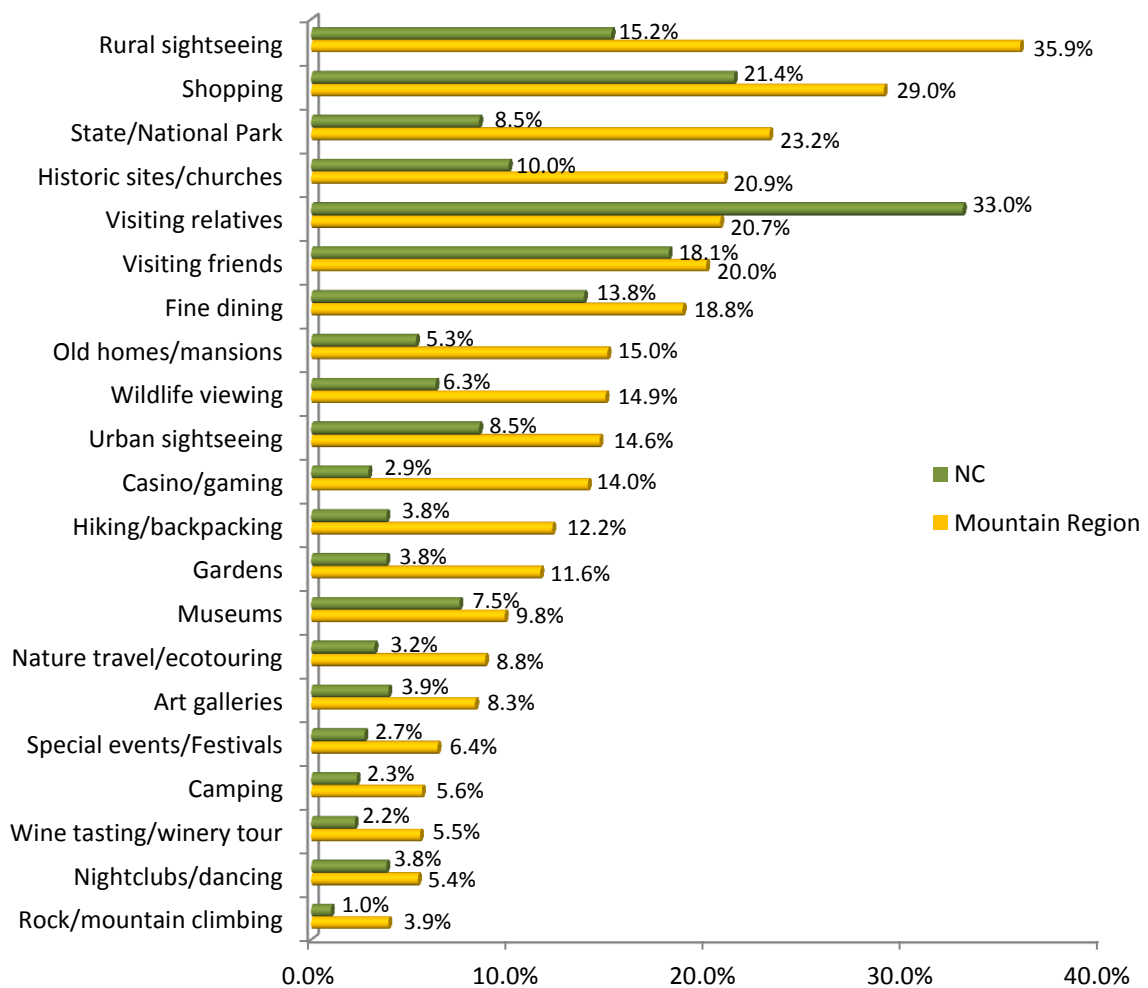
2011 Length of Time *Decide* on NC as Travel Destination



## Activities

Compared to all North Carolina overnight travelers, visitors to the Mountain Region participated in a greater number of activities while visiting the state. The region had a much larger share of visitors participate in rural sightseeing (15% North Carolina vs. 36% Mountain Region), visit a state/national park (9% North Carolina vs. 23% Mountain Region) and shopping (21% North Carolina vs. 29% Mountain Region). Other activities that were more popular for Mountain Region visitors were gaming, fine dining, visiting old homes and historic churches, and wildlife viewing, among many others. ***\*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.***

**2011 Activities Participated in by Overnight Visitors  
North Carolina vs. Mountain Region**





## 2011 Demographic Profile for Overnight Visitor Parties to the Mountain Region

	<b>North Carolina</b>	<b>Mountain Region</b>
<b>Average age of household head</b>	45.9 years of age	47.0 years of age
<b>Education of Household Head</b>		
High school or less	16.2%	19.1%
Some college - no degree	23.1%	24.9%
Completed college	40.5%	39.5%
Post Graduate College	20.2%	16.5%
<b>Annual Household Income</b>		
Less than \$25,000	13.3%	11.5%
\$25,000-\$49,999	23.1%	22.0%
\$50,000-\$74,999	20.9%	24.2%
\$75,000 & over	42.4%	42.4%
<b>Marital Status</b>		
Married	61.5%	61.3%
Never married	20.3%	20.5%
Divorced, widowed, separated	18.2%	18.2%
<b>Ethnicity</b>		
White	83.2%	88.9%
Black/African American	10.8%	4.1%
Asian or Pacific Islander	2.2%	2.8%
Other	3.8%	4.2%

## 2011 Top Advertising Markets

While the top ten advertising markets sending visitors to North Carolina’s Mountain Region are similar to the top ten advertising markets for the state of North Carolina, the Mountain Region saw a larger proportion of visitors from Greenville/Spartanburg, Greensboro/High Point/Winston-Salem, Knoxville, Charlotte, Tampa and Atlanta.

### Top Advertising Markets of Origin for 2011 Overnight Mountain Region Visitors VS. North Carolina Visitors

<i>DMA of Origin</i>	<i>Percent of Total Visitors to Mountain Region</i>	<i>Percent of Total Visitors to North Carolina</i>
Charlotte	10.4%	9.5%
Raleigh-Durham (Fayetteville)	9.8%	11.7%
Greensboro-High Point-Winston Salem	8.6%	6.8%
Atlanta, GA	7.9%	5.5%
Knoxville, TN	5.3%	2.7%
Greenville-Spartanburg-Asheville	5.0%	3.7%
Tampa-St. Petersburg, FL	3.6%	2.0%
Tri-Cities, TN-VA	2.3%	0.9%
Greenville-New Bern-Washington	2.1%	4.0%
Nashville	1.9%	0.7%
Boston (Manchester)	1.8%	1.3%
New York	1.6%	4.3%
Orlando-Daytona Beach-Melbourne	1.6%	1.6%
Columbia, SC	1.6%	1.6%
Birmingham	1.5%	0.5%
Cleveland-Akron	1.4%	1.4%
Columbus, OH	1.4%	0.6%

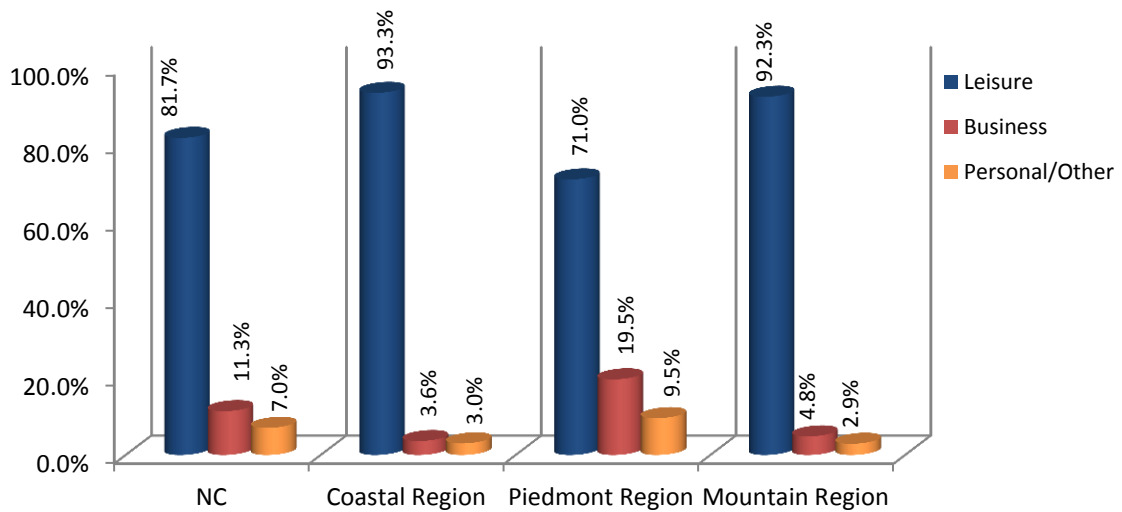
Note: Advertising markets defined by Nielsen’s Designated Market Area (DMA)

## 2011 Regional Comparison

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

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. At the same time, the Piedmont Region's share of business/convention travelers was larger than the proportion for the other regions.

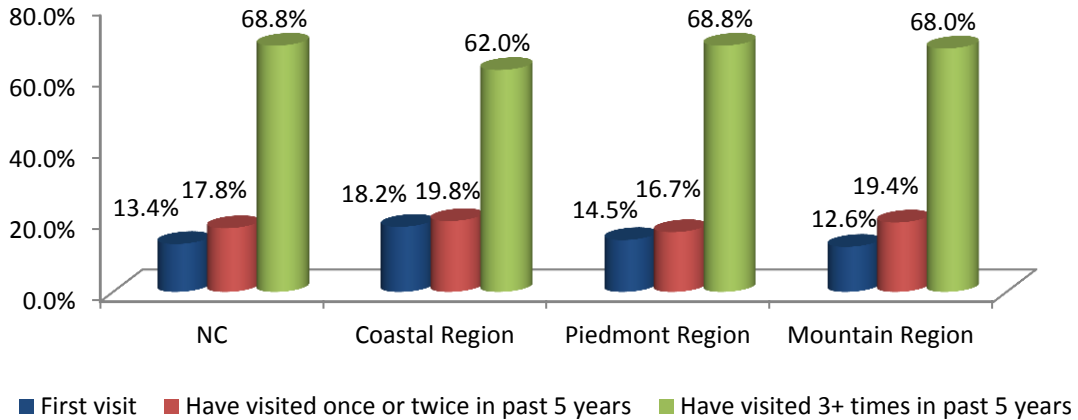
### 2011 Primary Purpose of Trip by Region



## First Time vs. Repeat Visitors

The majority of each region’s visitors are repeat visitors, though the Coastal Region sees somewhat less than the other two and the state in general.

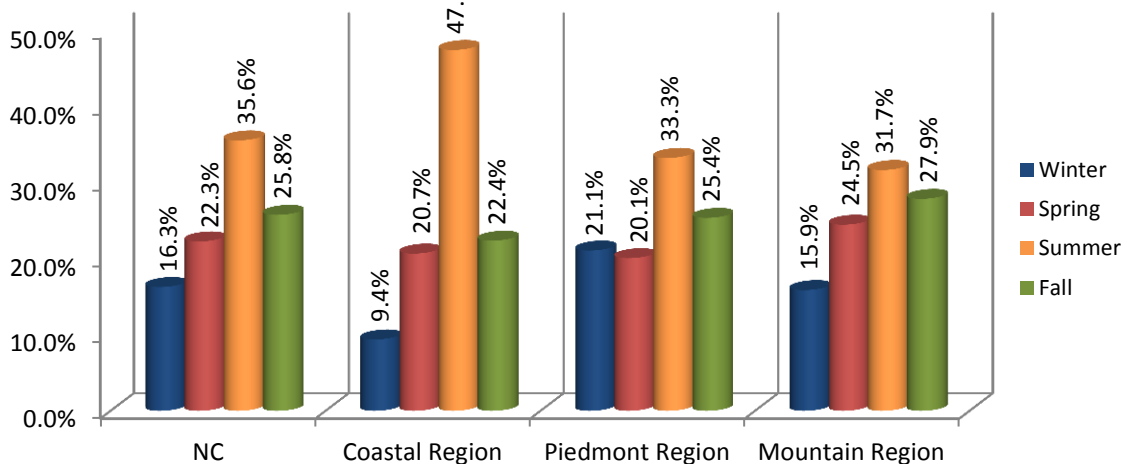
**2011 First Time vs. Repeat Visitors by Region**



## 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 has a larger proportion of visitors during the summer and fall.

**2011 Season of Travel by Region**



**2011 North Carolina Regional Travel Summary –**

**Coastal Region vs. Piedmont Region vs. Mountain Region**

**Average Length of Stay**

North Carolina	Coastal Region	Piedmont Region	Mountain Region
3.5 nights	4.5 nights	3.4 nights	3.4 nights

**Travel Party Size**

North Carolina	Coastal Region	Piedmont Region	Mountain Region
2.0 people	2.4 people	1.9 people	2.0 people

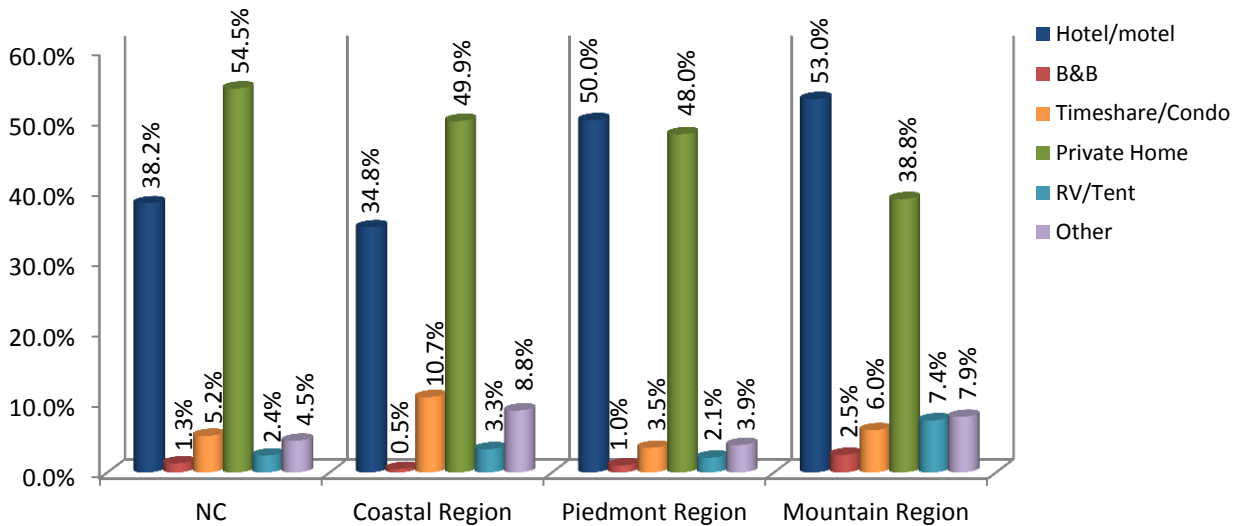
**Children on Trip**

North Carolina	Coastal Region	Piedmont Region	Mountain Region
27.5%	38.9%	25.0%	24.0%

**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 make use of hotels/motels and campgrounds more often, while Coastal Region visitors tend to stay in private homes and timeshares/condos.

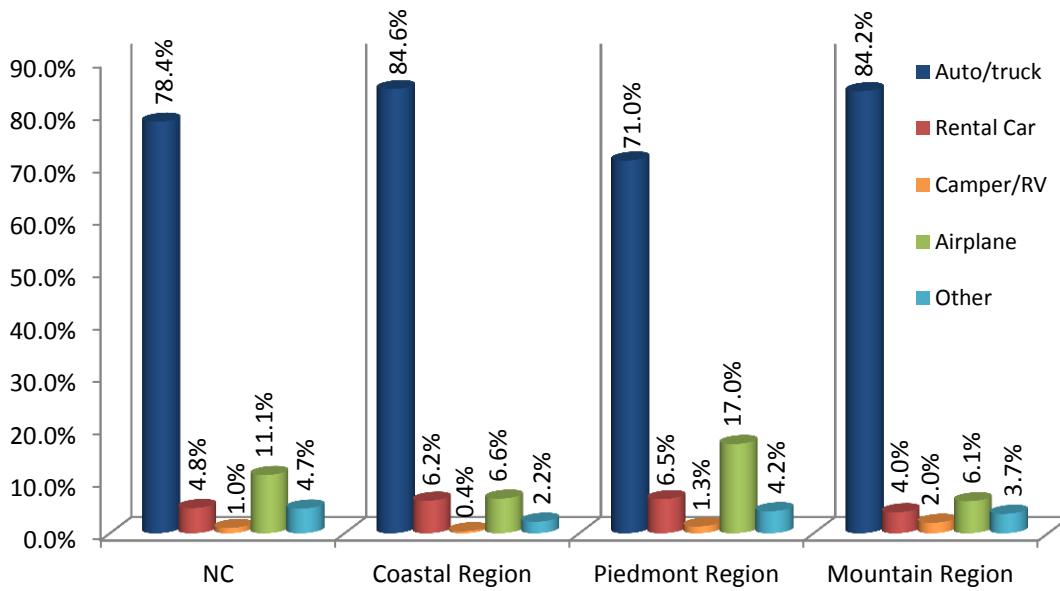
**2011 Lodging by Overnight Visitors by Region**



## Mode of Transportation

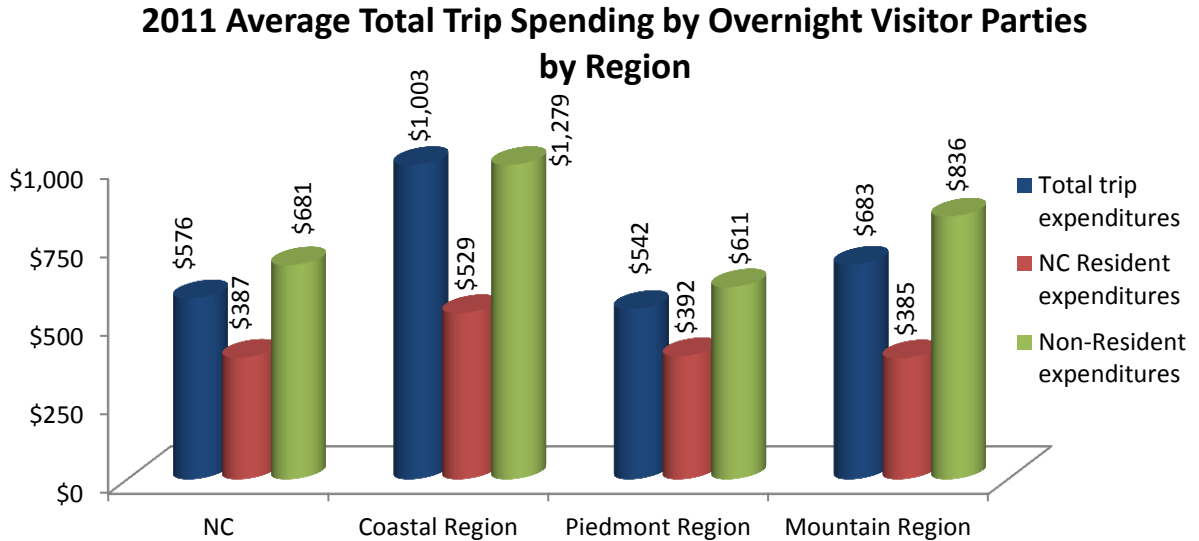
Not surprisingly, auto transportation was the primary use of travel by all of North Carolina visitors. The Piedmont Region, with the most and largest airports, saw the most travelers using air transportation (17.0%).

**2011 Primary Transportation by Overnight Visitors  
by Region**



## Trip Expenditures

Coastal Region visitor parties, on average, spent more than other regional visitors or NC in general. Visitor parties to this region stayed longer and have a slightly larger travel party size, explaining some of the increased spending.



## Origin of Overnight Visitors

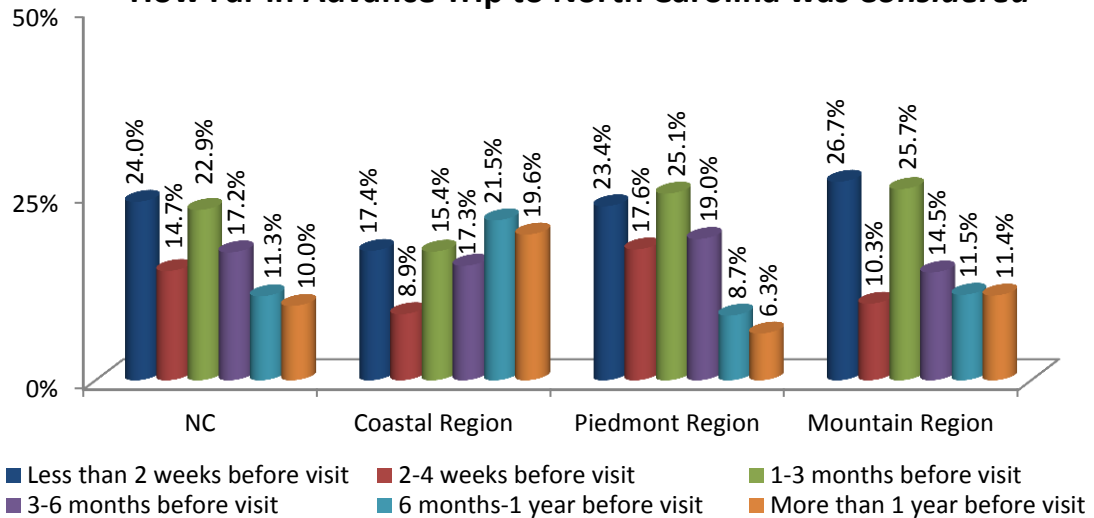
North Carolina is the top state of origin for all three regions of the state. In-state residents comprise around one-third of each region’s visitors. The other top states vary, though there is some overlap.

NC	Coastal Region	Piedmont Region	Mountain Region
North Carolina (36.8%)	North Carolina (37.9%)	North Carolina (31.7%)	North Carolina (33.6%)
Virginia (8.7%)	Virginia (14.5%)	Virginia (8.1%)	Georgia (10.4%)
Georgia (6.7%)	Pennsylvania (8.1%)	South Carolina (7.3%)	Florida (9.5%)
Florida (6.2%)	New Jersey (4.4%)	Georgia (6.6%)	Tennessee (8.9%)
South Carolina (6.1%)	New York (4.2%)	Florida (6.4%)	South Carolina (6.9%)

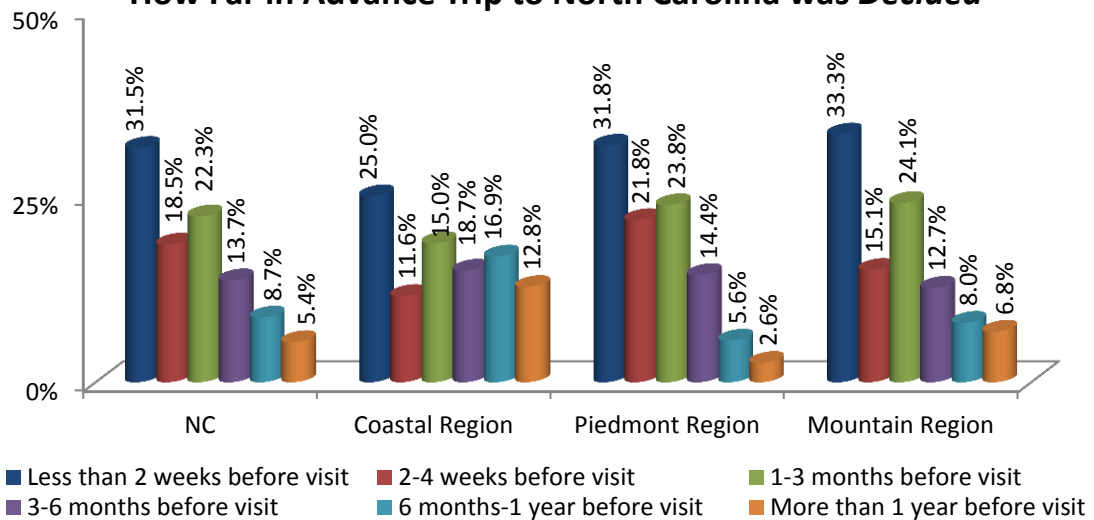
## Trip Planning

Visitors to the Coastal Region of North Carolina considered and planned travel to the state much farther in advance than did visitors to the Mountain or Piedmont regions. Nearly twenty percent of visitors who eventually traveled overnight to the state began considering a trip to North Carolina over a year prior to the visit and nearly thirty percent decided to travel to the state over six months prior to travel.

**How Far in Advance Trip to North Carolina was Considered**



**How Far in Advance Trip to North Carolina was Decided**





## Activities

Activities participated in by North Carolina overnight travelers in 2011 vary by region, but common activities between regions include visiting friends and relatives, shopping and sightseeing. Mountain region visitors 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.**

NC	Coastal Region	Piedmont Region	Mountain Region
Visiting relatives (33.0%)	Beach (68.1%)	Visiting relatives (35.7%)	Rural sightseeing (35.9%)
Shopping (21.4%)	Shopping (35.8%)	Visiting friends (20.7%)	Shopping (29.0%)
Visiting friends (18.1%)	Visiting relatives (30.6%)	Shopping (18.5%)	State/ National park (23.2%)
Beach (15.7%)	Historic sites/ Churches (20.3%)	Fine dining (13.0%)	Historic sites/ Churches (20.9%)
Rural sightseeing (15.2%)	Fine dining (19.1%)	Rural sightseeing (9.9%)	Visiting relatives (20.7%)
Fine dining (13.8%)	State/ National park (16.1%)	Urban sightseeing (9.9%)	Visiting friends (20.0%)
Historic sites/ Churches (10.0%)	Rural sightseeing (15.7%)	Museums (8.6%)	Fine dining (18.8%)
Urban sightseeing (8.5%)	Museums (14.3%)	Historic sites/ Churches (7.1%)	Old homes/ Mansions (15.0%)
State/ National park (8.5%)	Visiting friends (13.3%)	Nightclubs/ Dancing (5.1%)	Wildlife viewing (14.9%)
Museums (7.5%)	Wildlife viewing (11.4%)	State/ National park (4.1%)	Urban sightseeing (14.6%)
Wildlife viewing (6.3%)	Urban sightseeing (10.9%)	Art Galleries (3.7%)	Casino/ Gaming (14.0%)
Old homes/ Mansions (5.3%)	Fishing (8.9%)	Old homes/ Mansions (3.6%)	Hiking/ Backpacking (12.2%)
Art Galleries (3.9%)	Old homes/ Mansions (7.4%)	Special events/Festival (3.0%)	Gardens (11.6%)
Hiking/ Backpacking (3.8%)	Golf (6.2%)	Gardens (2.8%)	Museums (9.8%)
Nightclub/Dancing (3.8%)	Biking (4.4%)	Spa/Health Club (2.4%)	Nature travel/ Eco-touring (8.8%)
Gardens (3.8%)	Gardens (4.4%)	Nature travel/ Eco-touring (2.3%)	Art Galleries (8.3%)
Nature travel/ Eco-touring (3.2%)	Zoos (4.3%)	Wildlife Viewing (2.3%)	Special events/Festival (6.4%)
Golf (3.1%)	Nature travel/Eco-touring (3.8%)	Golf (2.2%)	Camping (5.6%)
Fishing (2.9%)	Bird watching (3.7%)	Major sports event (2.1%)	Wine tasting/winery tour (5.5%)
Casino/ Gaming (2.9%)	Art Galleries (3.3%)	Youth/amateur/collegiate sporting event (2.1%)	Nightclubs/ Dancing (5.4%)

**2011 North Carolina Regional Travel Summary –  
Coastal Region vs. Piedmont Region vs. Mountain Region**

**2011 Demographic Profile for Overnight Visitor Parties**

	<b>North Carolina</b>	<b>Coastal Region</b>	<b>Piedmont Region</b>	<b>Mountain Region</b>
<b>Average age of household head</b>	45.9 years of age	45.5 years of age	45.2 years of age	47.0 years of age
<b>Education of Household Head</b>				
High school or less	16.2%	18.9%	15.7%	19.1%
Some college - no degree	23.1%	24.4%	20.9%	24.9%
Completed college	40.5%	36.9%	42.9%	39.5%
Post Graduate College	20.2%	19.7%	20.5%	16.5%
<b>Annual Household Income</b>				
Less than \$25,000	13.3%	10.0%	14.4%	11.5%
\$25,000-\$49,999	23.1%	24.8%	22.0%	22.0%
\$50,000-\$74,999	20.9%	22.4%	18.6%	24.2%
\$75,000 & over	42.4%	42.5%	45.1%	42.4%
<b>Marital Status</b>				
Married	61.5%	67.1%	57.1%	61.3%
Never married	20.3%	17.4%	23.4%	20.5%
Divorced, widowed, separated	18.2%	15.5%	19.4%	18.2%
<b>Ethnicity</b>				
White	83.2%	87.3%	77.8%	88.9%
Black/African American	10.8%	7.9%	14.5%	4.1%
Asian or Pacific Islander	2.2%	2.4%	2.8%	2.8%
Other	3.8%	2.4%	5.0%	4.2%

## 2011 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 and the state in general, Charlotte is the primary market for the Piedmont and Mountain regions. The Georgia, Florida and Tennessee markets are most important to the Mountain Region while the Virginia and mid-Atlantic markets are crucial to the Coastal Region.

NC	Coastal Region
Raleigh-Durham-Fayetteville (11.7%)	Raleigh-Durham-Fayetteville (14.9%)
Charlotte (9.5%)	Greenville-New Bern-Washington (7.5%)
Greensboro-High Point-Winston Salem (6.8%)	Charlotte (6.3%)
Atlanta (5.5%)	Greensboro-High Point-Winston Salem (6.0%)
New York (4.3%)	New York (5.8%)
Greenville-New Bern-Washington (4.0%)	Washington, DC (Hagerstown, MD) (5.8%)
Greenville-Spartanburg-Asheville (3.7%)	Philadelphia (4.7%)
Washington, DC (Hagerstown, MD) (3.3%)	Richmond-Petersburg (4.2%)
Norfolk-Portsmouth-Newport News (2.7%)	Pittsburgh (3.0%)
Knoxville (2.7%)	Norfolk-Portsmouth-Newport News (3.0%)
Piedmont Region	Mountain Region
Charlotte (11.6%)	Charlotte (10.4%)
Raleigh-Durham-Fayetteville (10.4%)	Raleigh-Durham-Fayetteville (9.8%)
Greensboro-High Point-Winston Salem (5.3%)	Greensboro-High Point-Winston Salem (8.6%)
New York (5.1%)	Atlanta, GA (7.9%)
Greenville-New Bern-Washington (4.6%)	Knoxville (5.3%)
Atlanta (4.3%)	Greenville-Spartanburg-Asheville (5.0%)
Norfolk-Portsmouth-Newport News (4.0%)	Tampa-St. Petersburg (3.6%)
Greenville-Spartanburg-Asheville (3.3%)	Tri-Cities, TN-VA (2.3%)
Washington DC (Hagerstown, MD) (3.2%)	Greenville-New Bern-Washington (2.1%)
Wilmington (2.4%)	Nashville (1.9%)

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

## **2011 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.