

North Carolina Visitor Sentiment



Perceptions, Insights and Pathway to Post-Hurricane Recovery

Expanded Custom Report
Wave 7 May 2025 Fielding

Survey METHODOLOGY

Survey Methodology

- **Objective:** To provide North Carolina timely insights evaluating overall brand perception, post-hurricane sentiment, likelihood of visitation to North Carolina and evaluate long-term travel intentions. This study also aims to track shifts in sentiment and travel intentions, assess the effectiveness of current marketing and communication, and identify information needs of prospective visitors.
- MMGY Travel Intelligence conducted an online survey among 2000 travelers aged 18 years or older who traveled for an overnight leisure trip within the past three years. The survey was targeted to respondents within the following key origin markets:
 - DC
 - Orlando
 - NYC
 - Chicago
 - Tampa, FL
 - Jacksonville, FL
 - Boston, MA
 - Birmingham, AL
 - Texas (Dallas, Houston, Austin)
 - Northeast Region (Albany-Schenectady-Troy/NY, Baltimore, Buffalo, Elmira, Erie, Harrisburg-Lancaster-Lebanon-York, Hartford/New Haven/CT, Johnstown-Altoona-State College/PA, Philadelphia, Pittsburgh, Rochester, Salisbury/MD, Syracuse, Utica, Watertown, Wilkes Barre-Scranton-Hazleton/PA)
 - South Region (Atlanta/GA, Augusta-Aiken/GA-SC, Charleston-Huntington/WV, Charlottesville/VA, Chattanooga/TN, Clarksburg-Weston/WV, Columbus/GA, Ft. Myers-Naples, Gainesville, Harrisonburg/VA, Huntsville-Decatur/AL, Lexington/KY, Louisville/KY, Macon/GA, Miami-Ft. Lauderdale, Mobile-Pensacola, Savannah, Tallahassee, West Palm Beach/FL)
 - Midwest (Cincinnati, Cleveland, Columbus, Dayton, Detroit, Indianapolis, Toledo, Youngstown, Zanesville)
- Wave 7 of the survey was fielded **May 14th – May 29th, 2025**. Data were tabulated and analyzed by MMGY Travel Intelligence.
- Throughout the report, data in bold indicates a significant difference.
- This sample size yields an error range of +/- 1.8 percentage points at the 95% level of confidence. This means that if the survey was to be replicated 100 times, we would expect the results to vary by no more than 1.8 percentage points 95 of those times.

Executive **Summary**

Wave 7 Executive Summary

Key Insights

- Travelers who visited North Carolina within the past year primarily visited the Piedmont, Coastal Plain and Smoky Mountains and Cherokee regions, with the majority visiting during the Spring, Summer or early Fall months. Asheville and the Foothill region saw a decrease in travel, likely due to the impacts of Hurricane Helene during the Fall.
- These travelers visited the state for relaxation, to connect with family and friends and to enjoy the natural beauty of North Carolina. Generally, they left very satisfied and felt safe and welcome when visiting the state.
- Potential travelers continue to emphasize a desire for a peaceful vacation where outdoor recreation and natural beauty can be admired and enjoyed. Respondents associate North Carolina with beaches and mountains, friendly residents and scenic beauty. Eight in ten respondents believe that North Carolina delivers when it comes to key infrastructure characteristics. Confidence in the state's clean drinking water saw significant increases and certainty in well-maintained infrastructure is higher than ever.

Wave 7 Executive Summary

Key Insights

- While a nearly half of past travelers with reservations after September 27th, 2024, reported that their plans were affected by Hurricane Helene, the majority stated that their bookings remained unchanged.
- Three in ten potential travelers who were disinterested in visiting the mountains of North Carolina cited a preference for other types of destinations or unfamiliarity with the region. These two aspects may be working in tandem- those unfamiliar with the region other than name may not be looking further into offerings as there is an assumption it will not be their destination preference. Compared to Wave 4, concern surrounding the destination's readiness after the hurricane decreased to 12%. This will need to be closely monitored to see if it continues to fall in subsequent waves.
- When asked what resources were important to feel confident traveling to North Carolina after a hurricane, potential travelers emphasized clear, up-to-date information surrounding the destination, real-time weather updates, and accessibility.

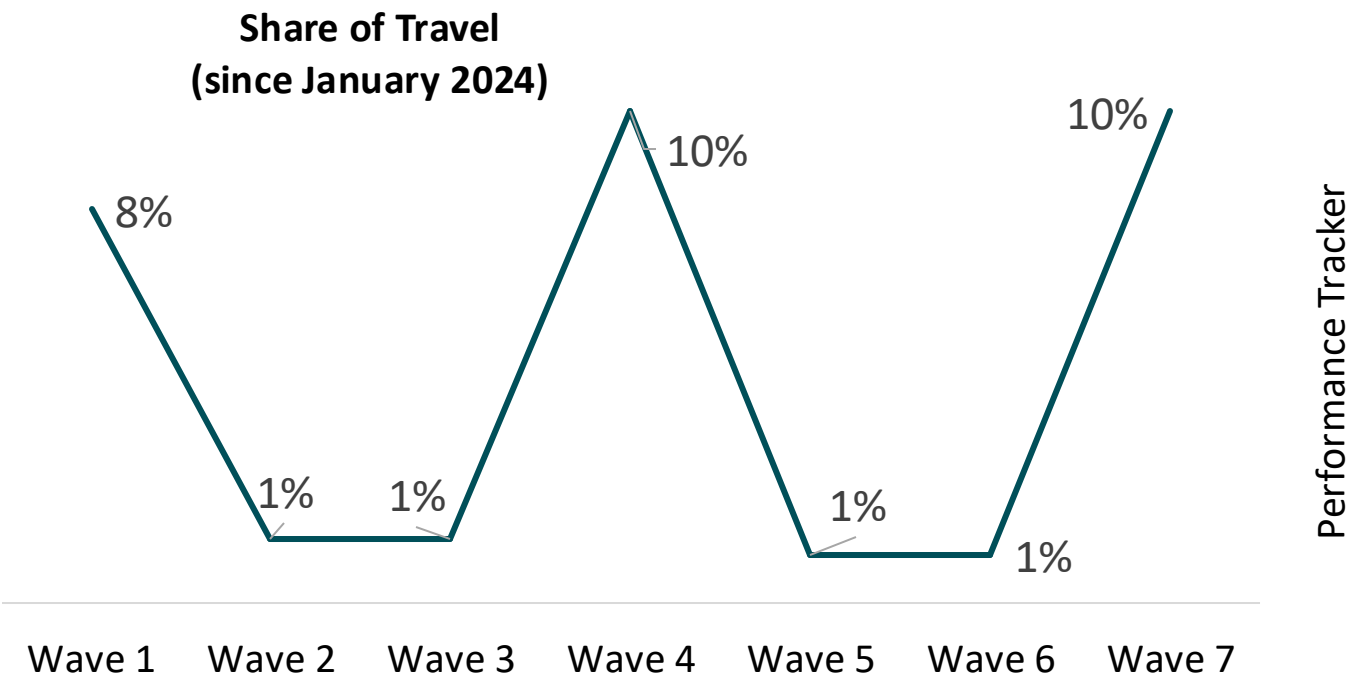
Key

INSIGHT #1

Travelers who visited North Carolina within the past year continued to search for trips that were peaceful and relaxing, where they could enjoy the natural beauty of the state. Visits to Piedmont increased significantly, outperforming Wave 1. Visits to Asheville and the Foothills were impacted, likely due to Hurricane Helene.

NC shares and Trips

Past Travelers	Mean number of nights (for overnight trips)
Wave 1	4.2
Wave 2	3.5
Wave 3	2.8
Wave 4	4.2
Wave 5	3.7
Wave 6	3.2
Wave 7	3.9

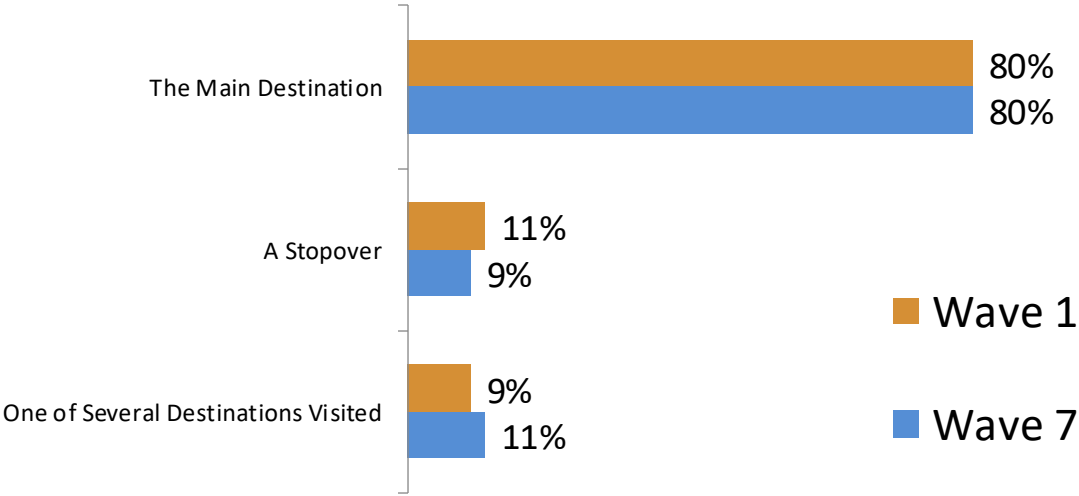




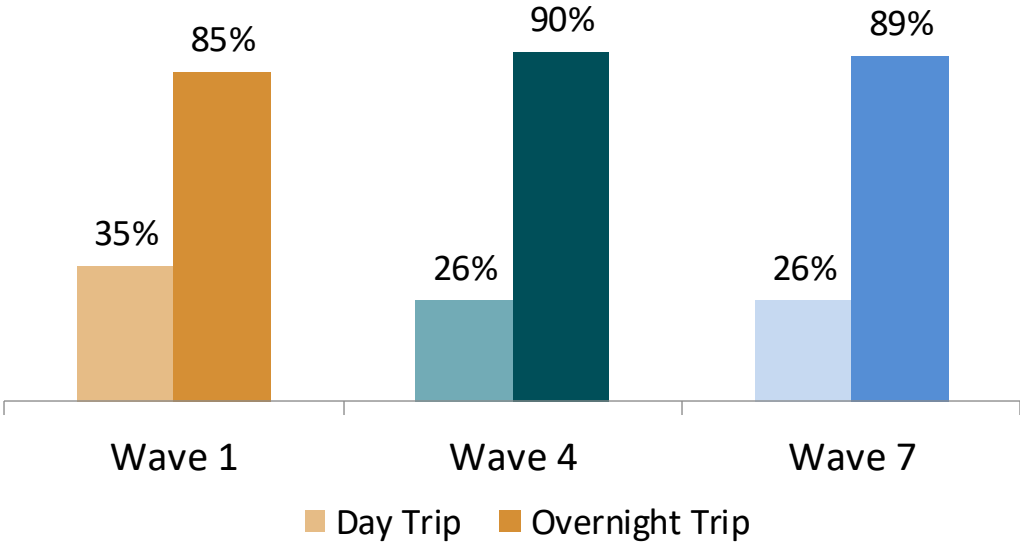
Past
Travelers

NC Trip Types

North Carolina was...



Day vs Overnight Trips

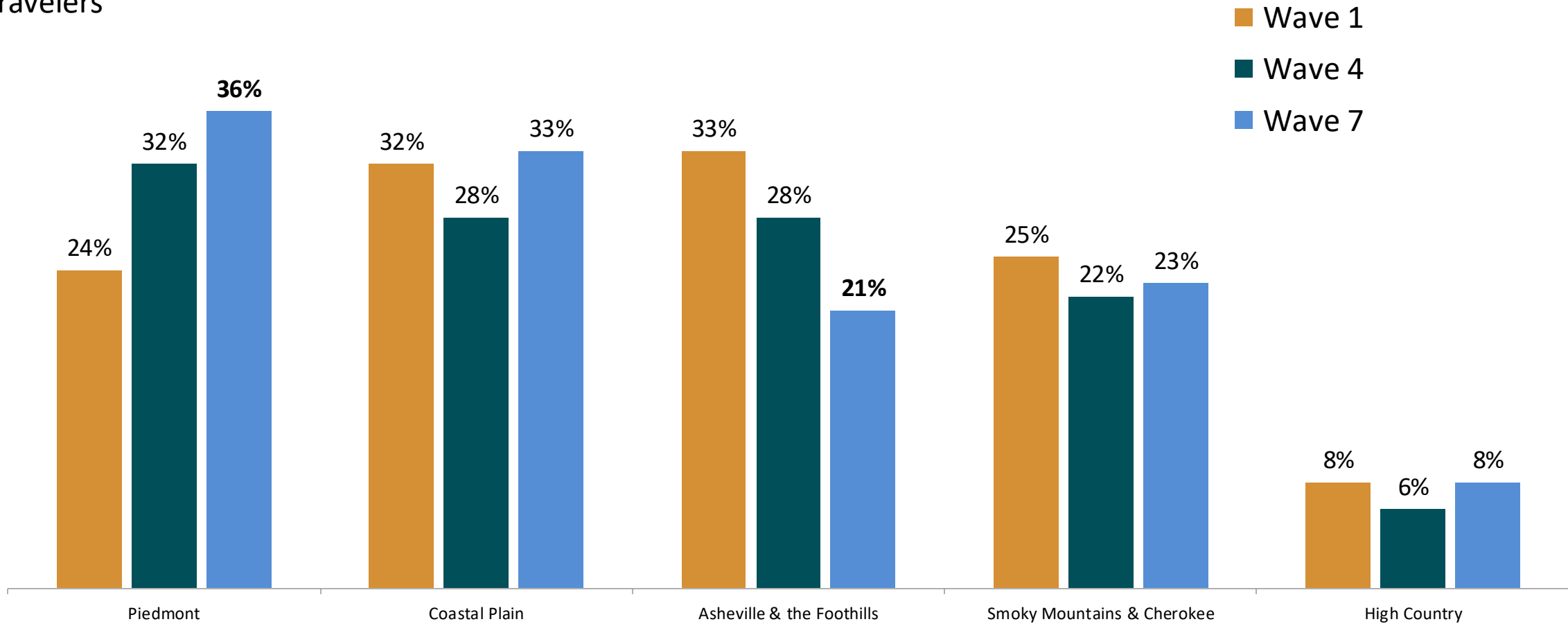


Key Insight 1



Past
Travelers

Regions Visited

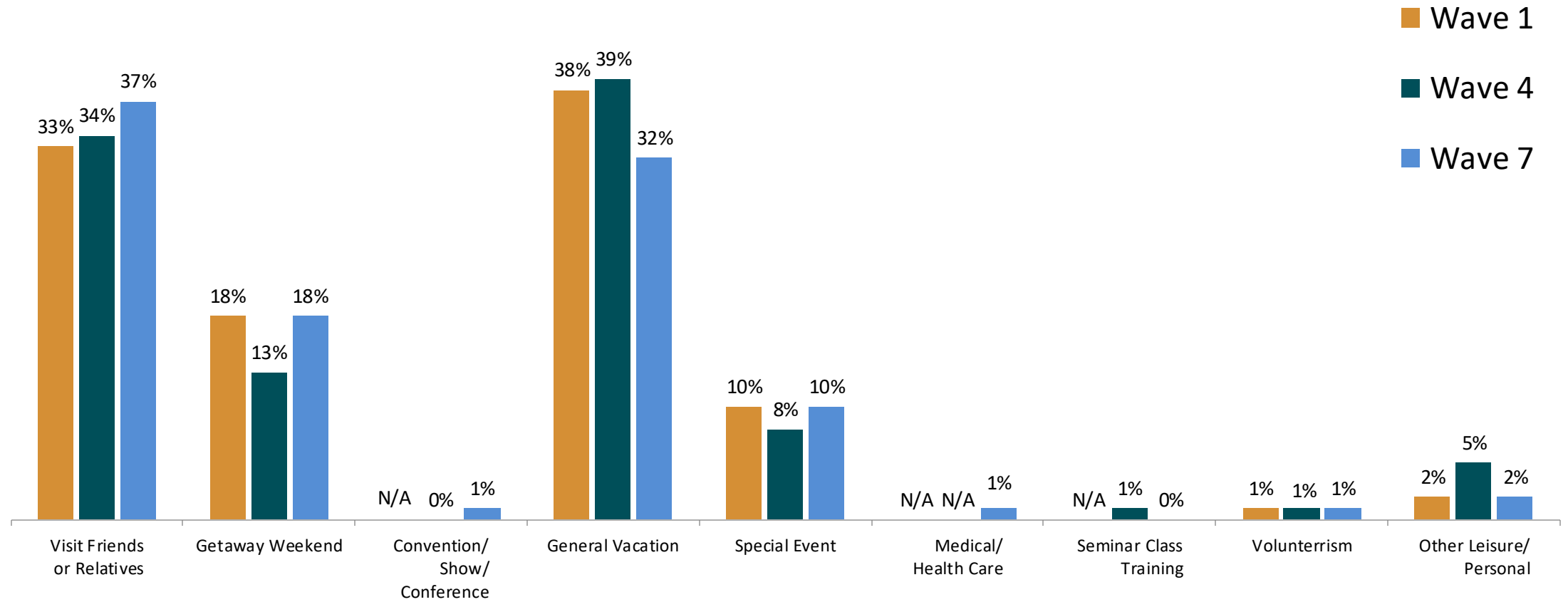


Key Insight 1



Past
Travelers

NC Travel Purpose



Performance Tracker



Past Travelers

Reasons for Visiting

	Wave 1	Wave 7
Peaceful and relaxing	44%	46%
I have friends or family there	42%	44%
Natural beauty	41%	40%
Beautiful mountain scenery	38%	30%
Interesting small towns	24%	27%
Great weather	35%	25%
There is a lot to see and do	25%	23%
Great place for family vacations	23%	23%
It is safe	25%	22%
Plenty of outdoor recreational opportunities	22%	21%
I find that North Carolina is a great value	22%	19%
It is a tradition. I always visit North Carolina	18%	18%
Beaches are among the best in the U.S.	19%	17%

 Significantly higher than Wave 1

	Wave 1	Wave 7
Local culture	18%	16%
Fine dining options	19%	12%
A wide range of local and regional culinary options	12%	10%
To participate in an event or a festival	9%	8%
There are flights from airports near me	4%	8%
Nightlife and entertainment	9%	7%
Unique from neighboring states	8%	7%
To play golf	7%	7%
Vibrant urban areas	8%	6%
It has world class resorts	5%	3%
Many of the hotels and timeshares have been recently renovated/refreshed	5%	3%
Opportunities to volunteer	3%	3%
Gambling in casinos on tribal land	6%	2%

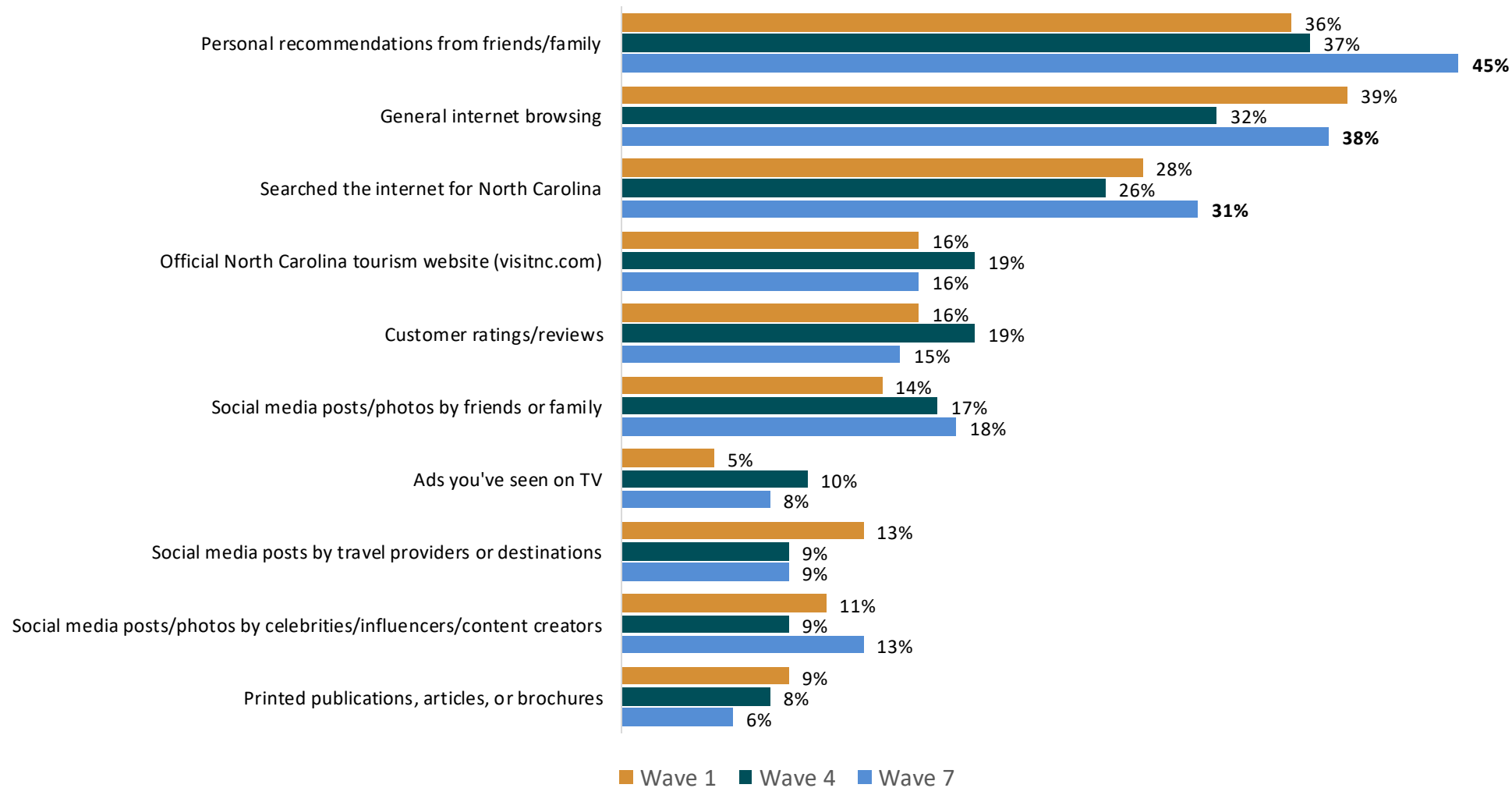
 Significantly lower than Wave 1

Key Insight 1



Past
Travelers

Sources of Media Information for North Carolina

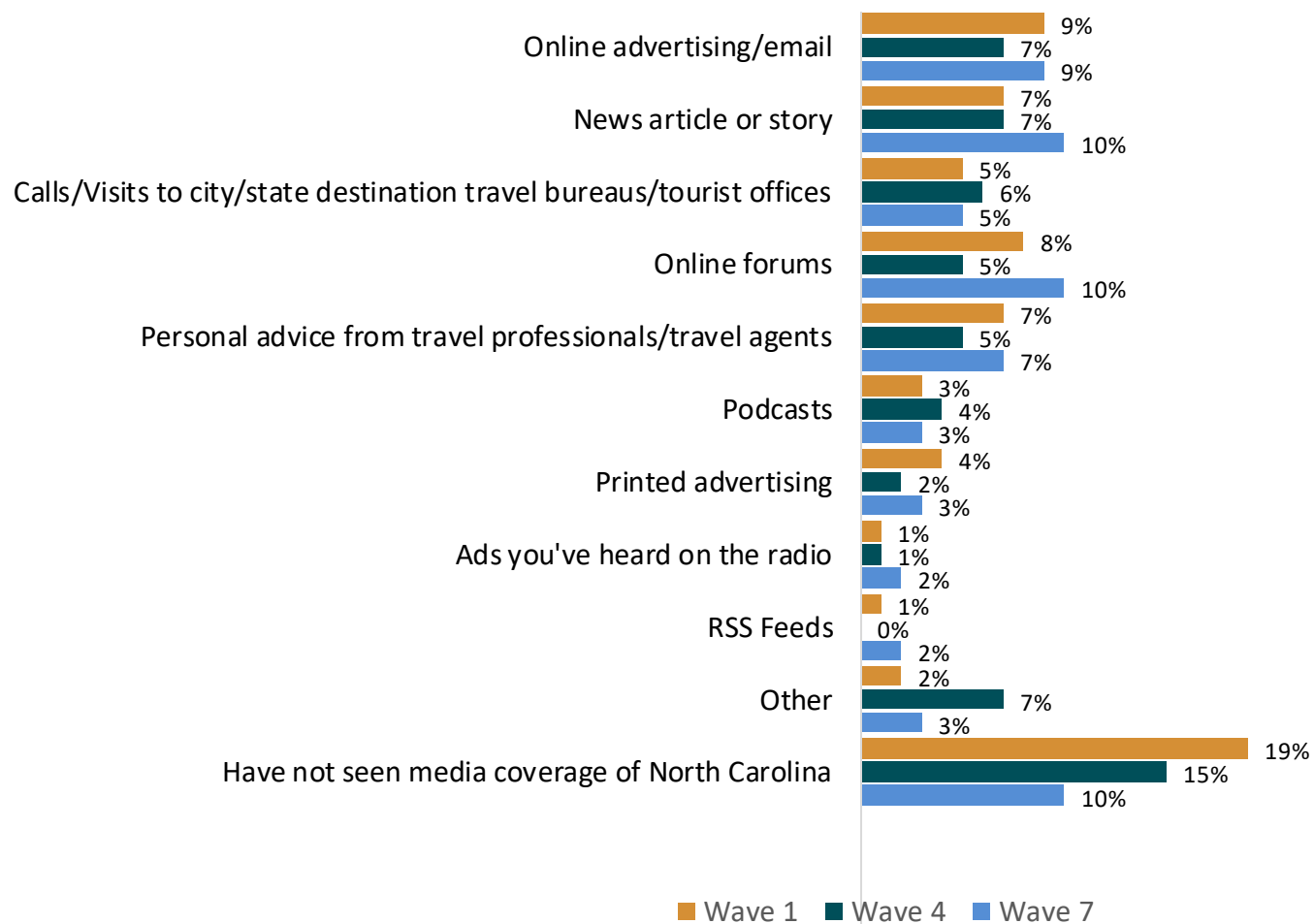


Key Insight 1



Past
Travelers

Sources of Media Information for North Carolina (cont.)



Key Insight 1



Past
Travelers

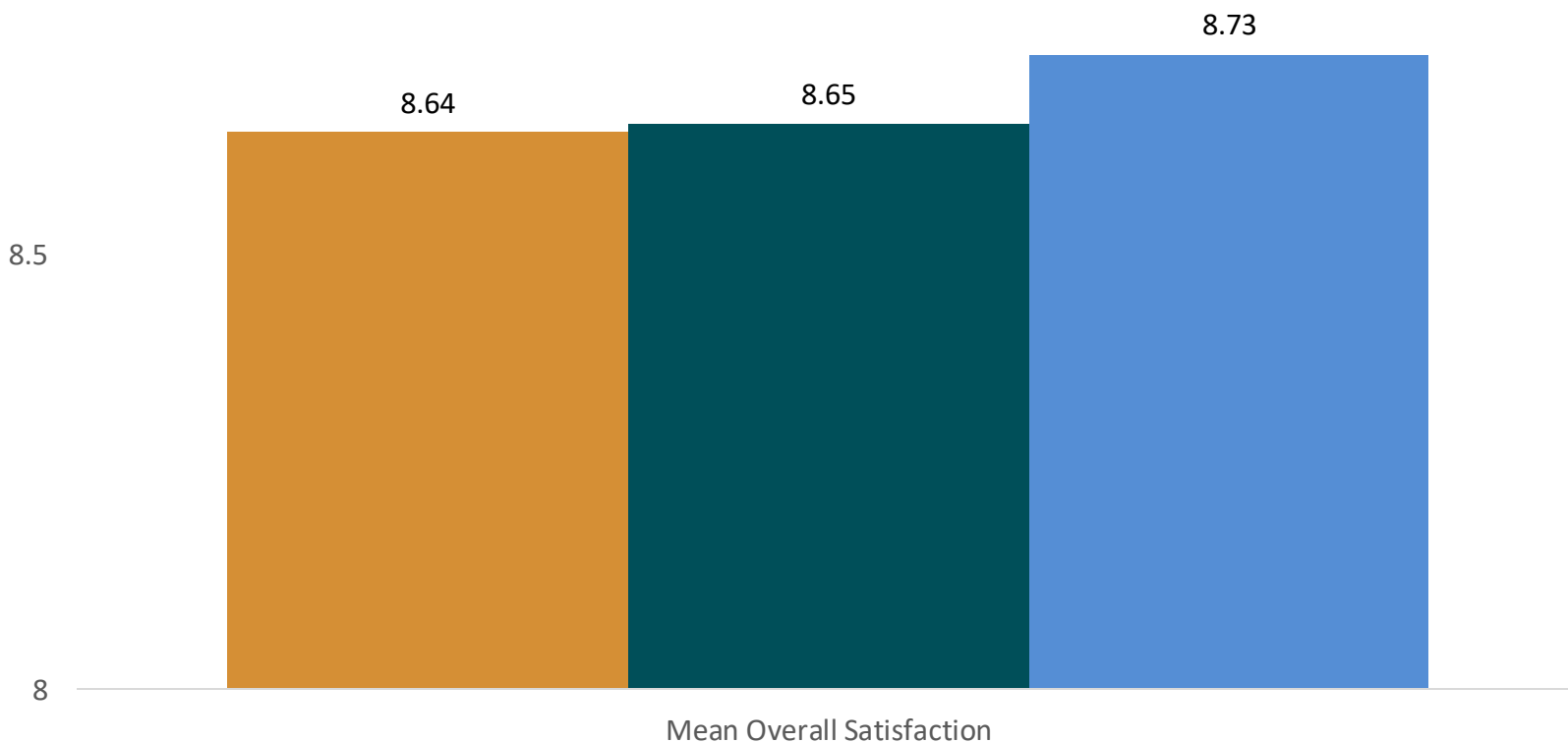
9

Satisfaction

Wave 1

Wave 4

Wave 7



North Carolina visitors continue to leave the state feeling very satisfied. Sixty percent of respondents rated North Carolina a 9 or 10 on a 10-point satisfaction scale, and no respondents this wave considered their experience poor (rating of 4 or below).

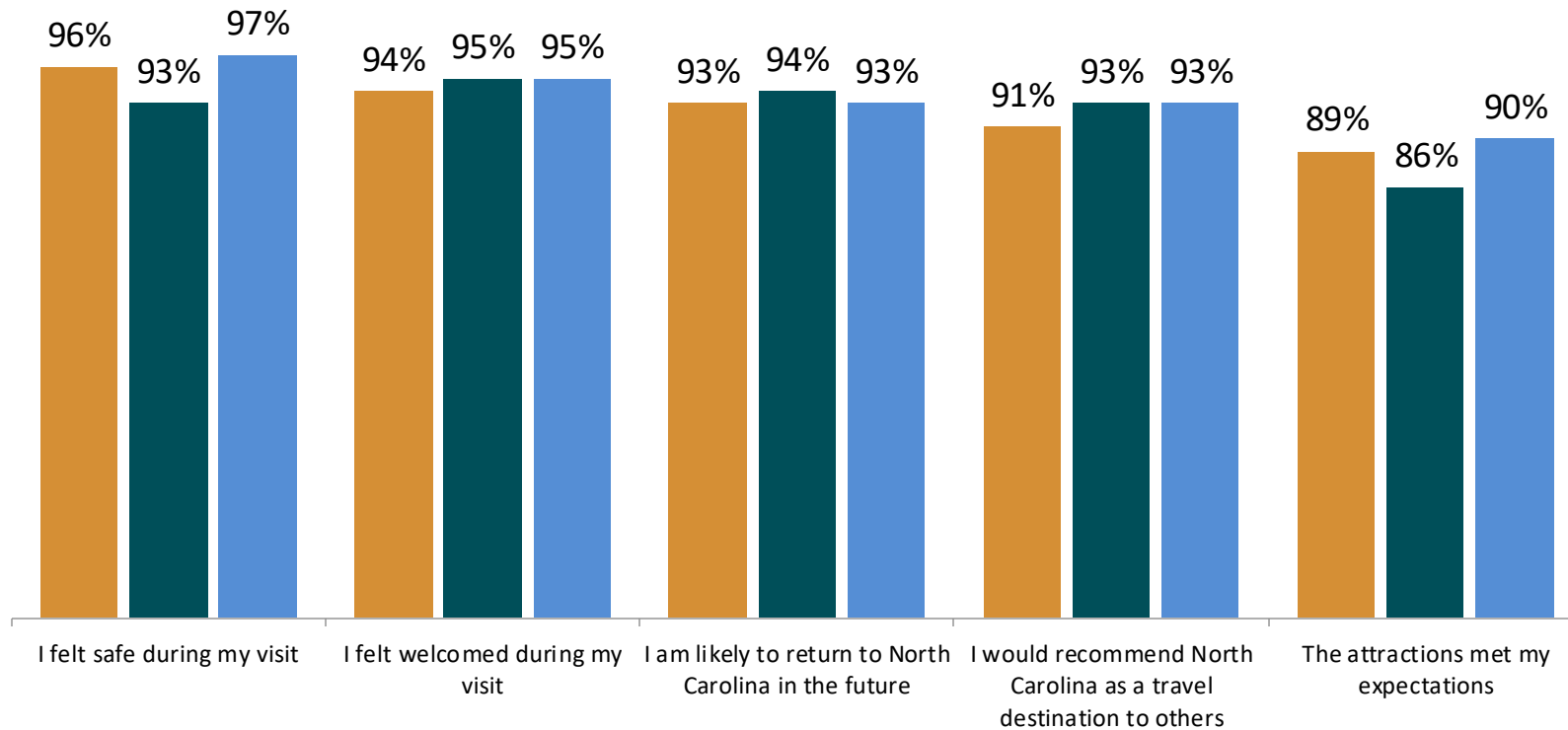


Past
Travelers

Satisfaction

Top 2 Box % (4-5)

Wave 1
Wave 4
Wave 7



North Carolina visitors continue to rank the state highly across all attributes, with 95% of respondents satisfied with how welcome they felt in the state. Safety ranked higher than ever, with 97% of respondents reporting they felt safe during their visit.

Key

INSIGHT #2

The natural beauty of North Carolina continues to shine through for Potential Travelers. Activities such as water sports and cultural performances saw significant performance growth, as well as infrastructure and safety characteristics. Respondents continue to believe North Carolina delivers across the travel characteristics they consider most important.



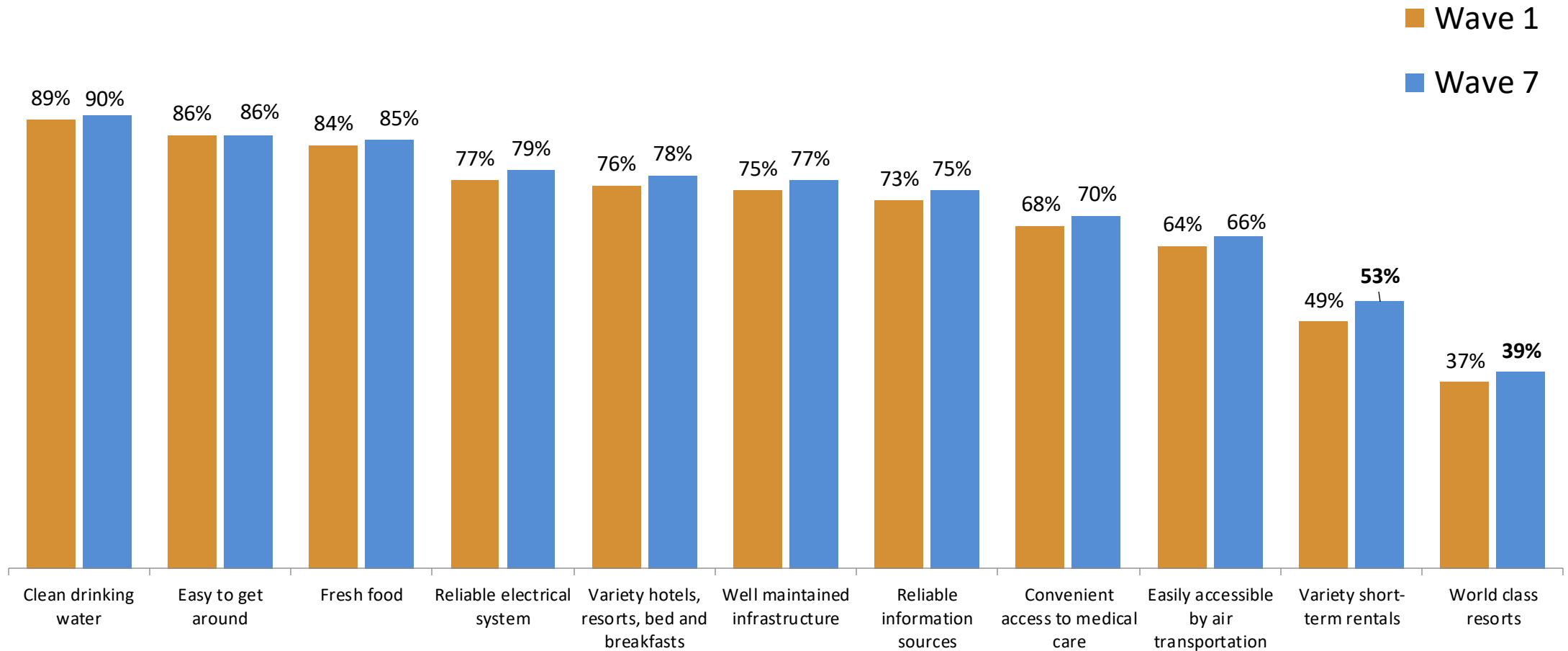
Potential Travelers





Important Characteristics- Infrastructure, Transportation and Accommodations

Potential
Travelers

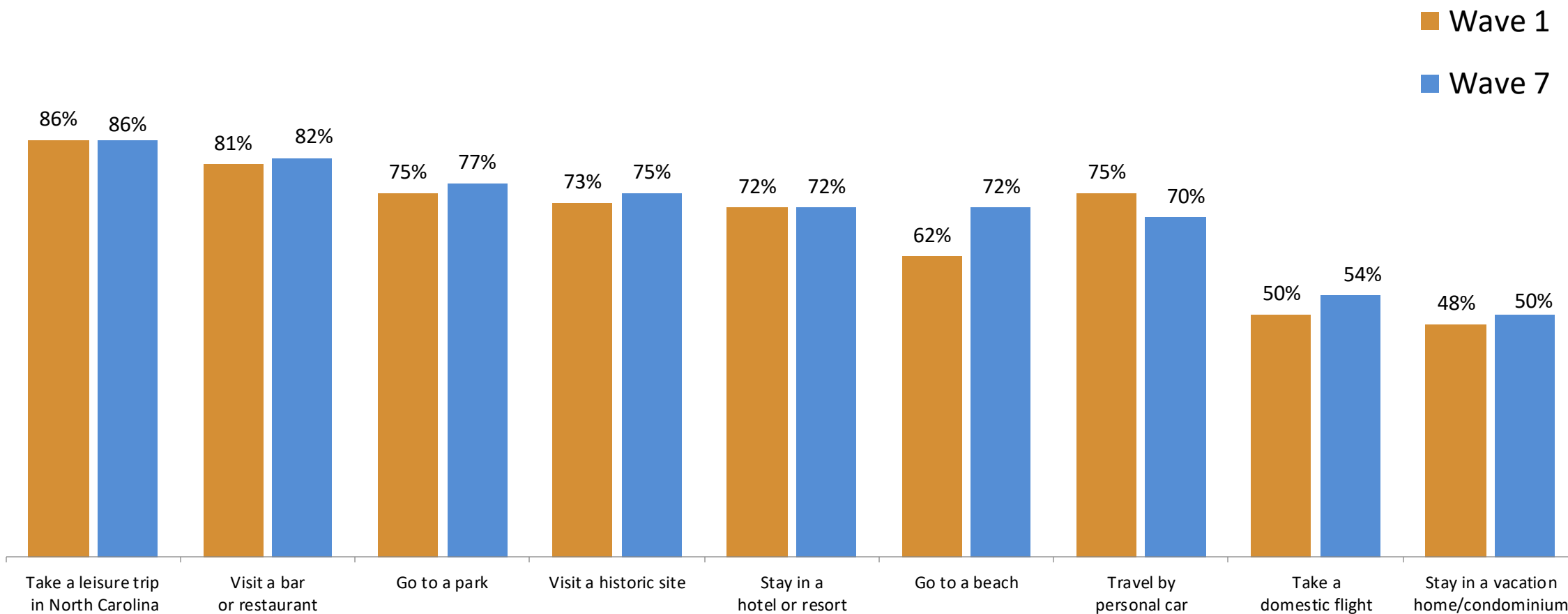


Key Insight 4



Likelihood of Engaging in Activity in North Carolina

Interested Travelers

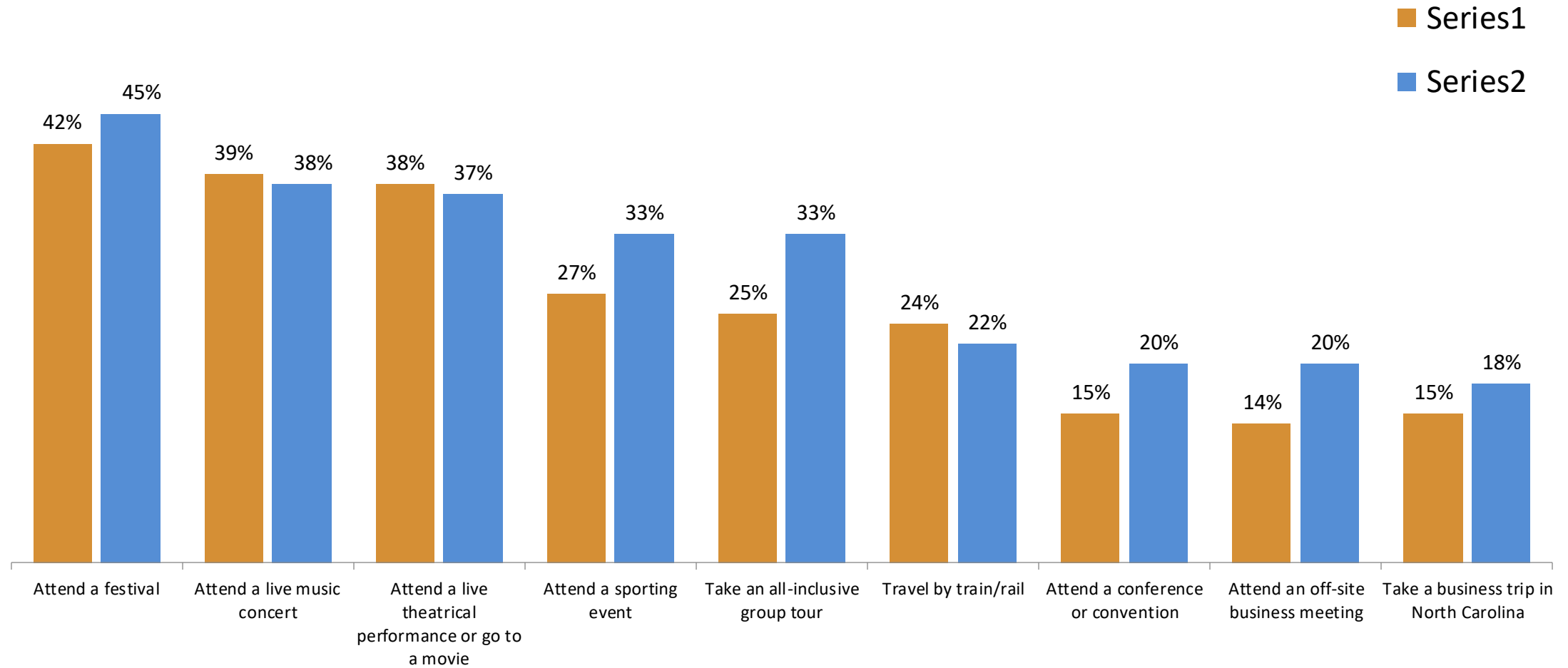


Key Insight 4



Likelihood of Engaging in Activity in North Carolina (cont.)

Interested Travelers

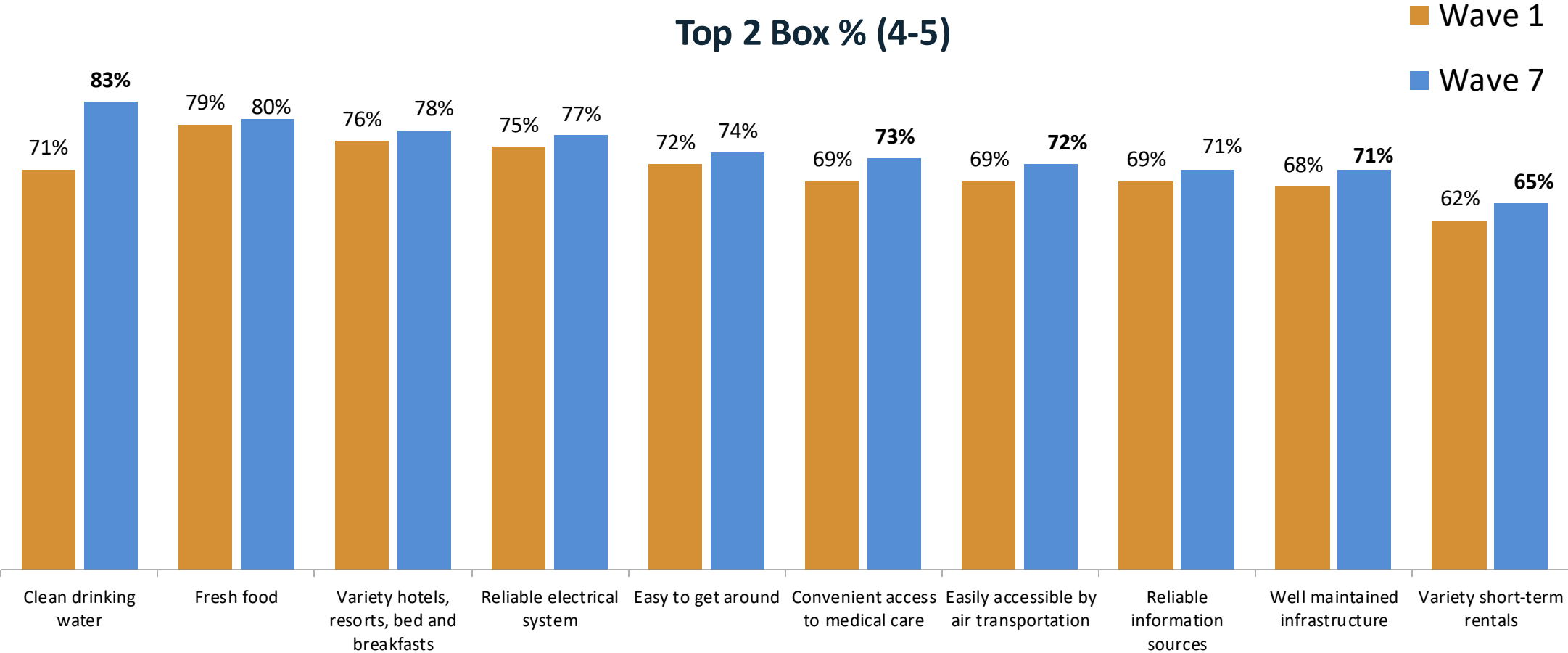


Key Insight 4



Where North Carolina Delivers- Infrastructure, Transportation and Accommodations

Potential Travelers



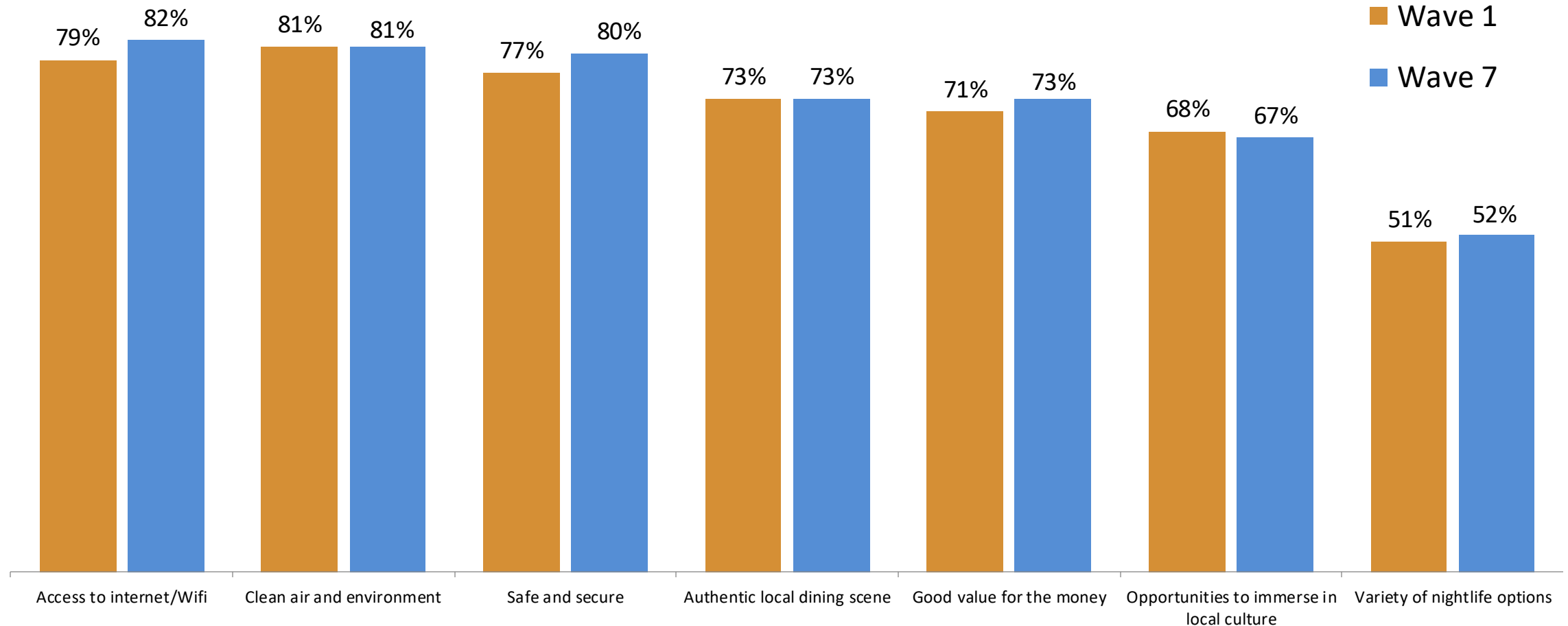
Key Insight 4



Potential
Travelers

Where North Carolina Delivers- General Characteristics

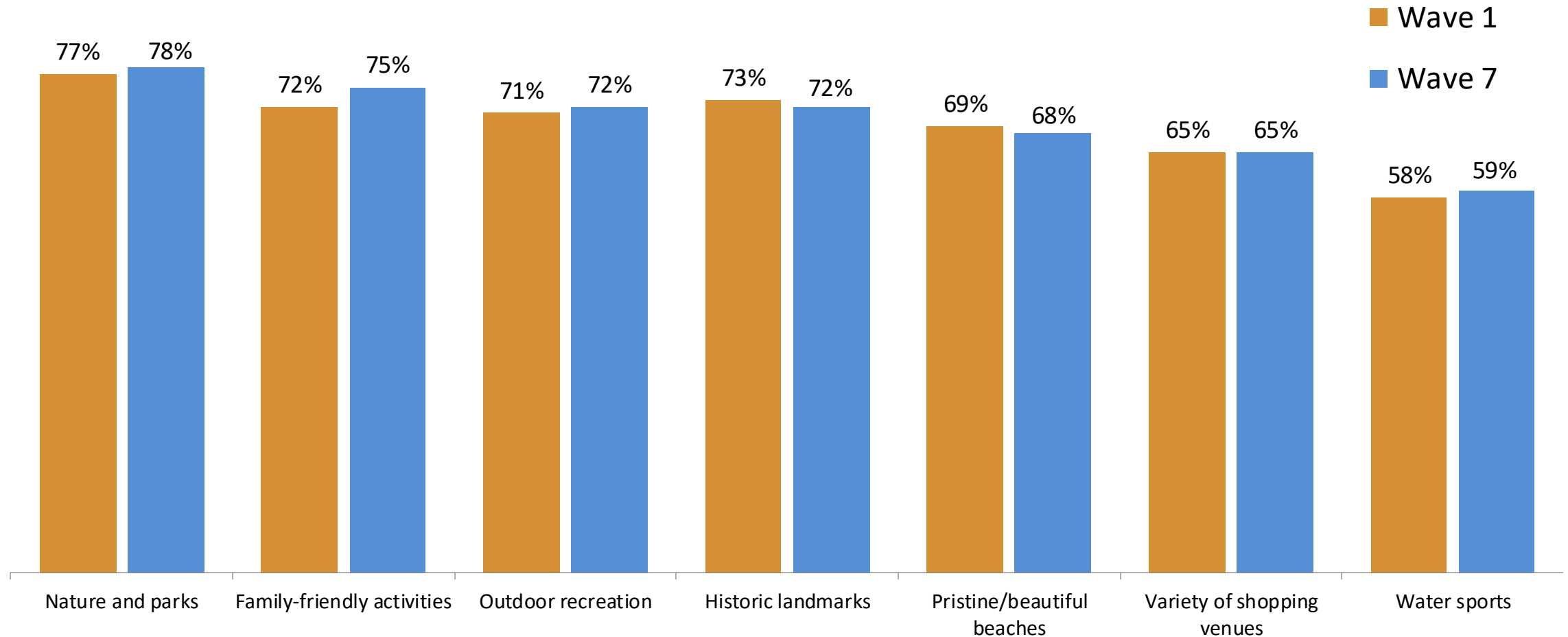
Top 2 Box % (4-5)





Where North Carolina Delivers- Activities and Recreation

Potential
Travelers



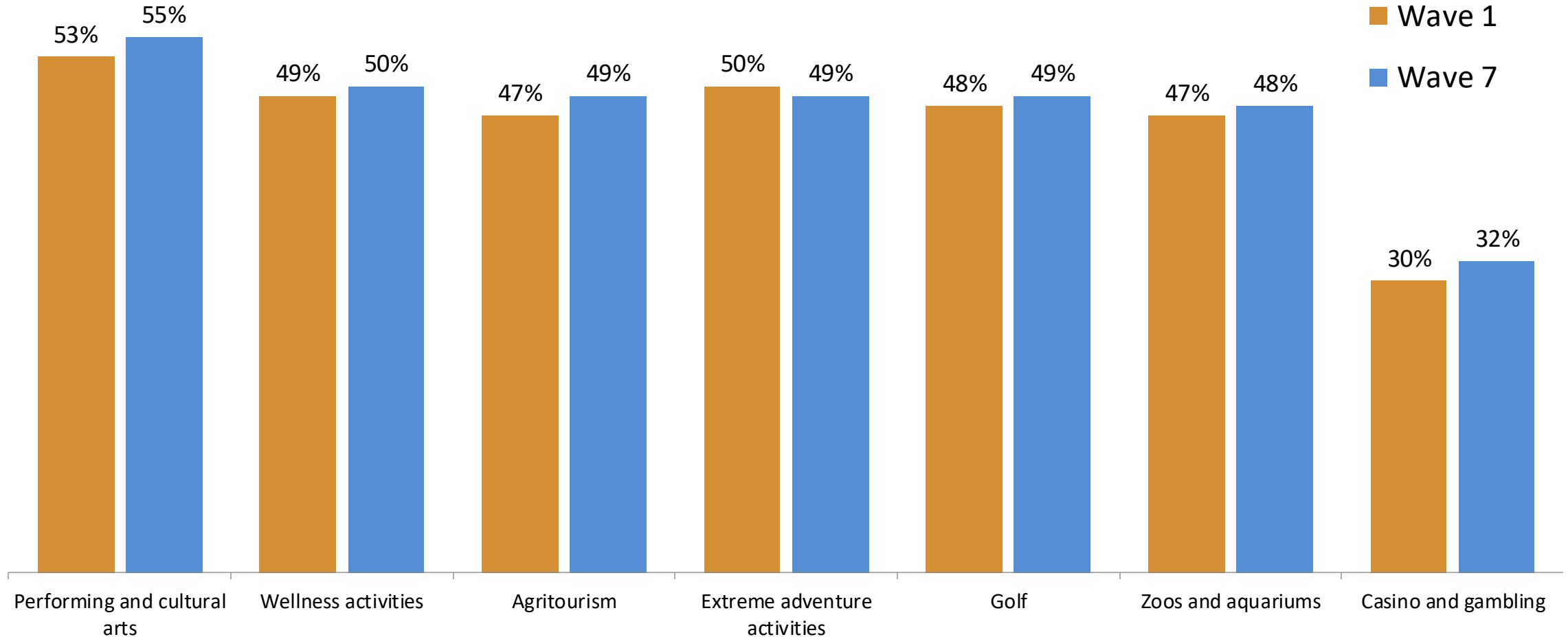
Key Insight 4



Potential
Travelers

Where North Carolina Delivers- Activities and Recreation

Top 2 Box % (4-5)



Key Insight 4

Key

INSIGHT #3

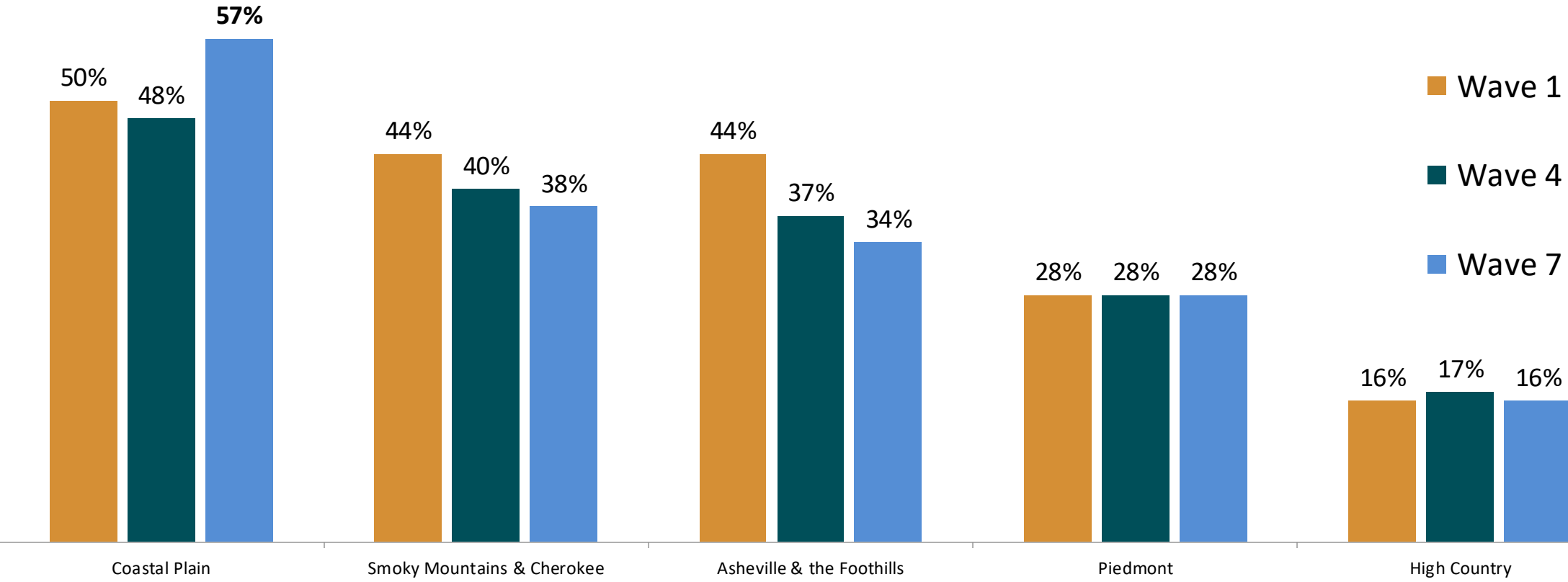
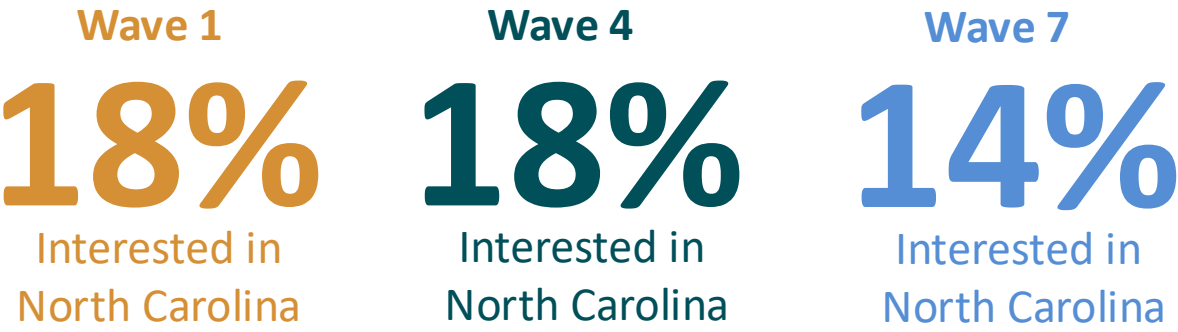
Fourteen percent of Potential Travelers are interested in visiting North Carolina, with 92% of interested travelers likely to visit the state before December 31st, 2025.

Similar to Past Travelers, Potential Travelers in Wave 7 are looking for a peaceful vacation where they can take in the natural beauty and great weather they associate with the state.



Potential
Travelers

Regions of Interest



Wave 1

Wave 4

Wave 7

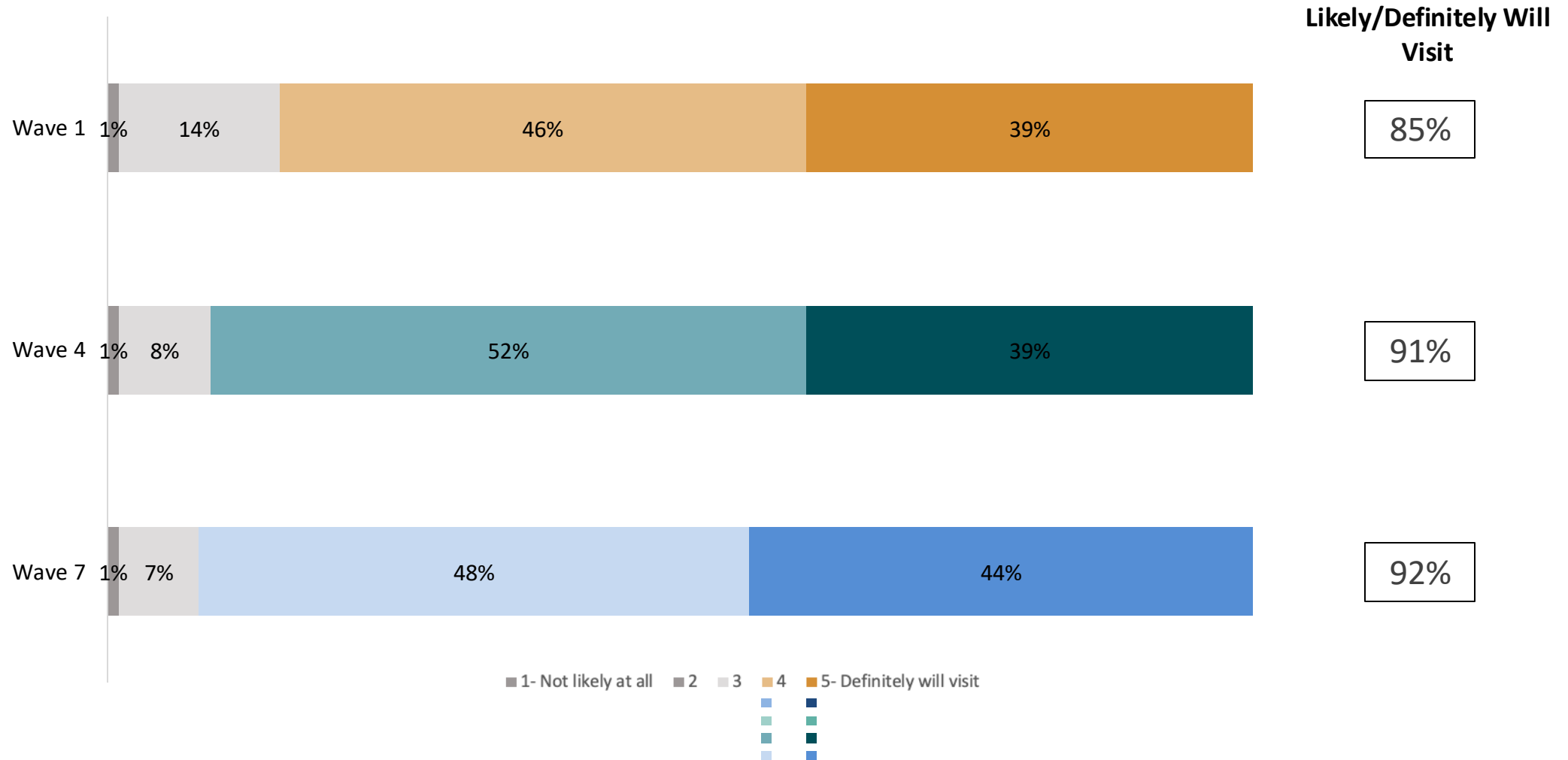
Key Insight 3

Base: Wave 7 Potential Travelers (n=242)



Likelihood of Traveling to North Carolina before Dec. 31st 2025

Interested Travelers

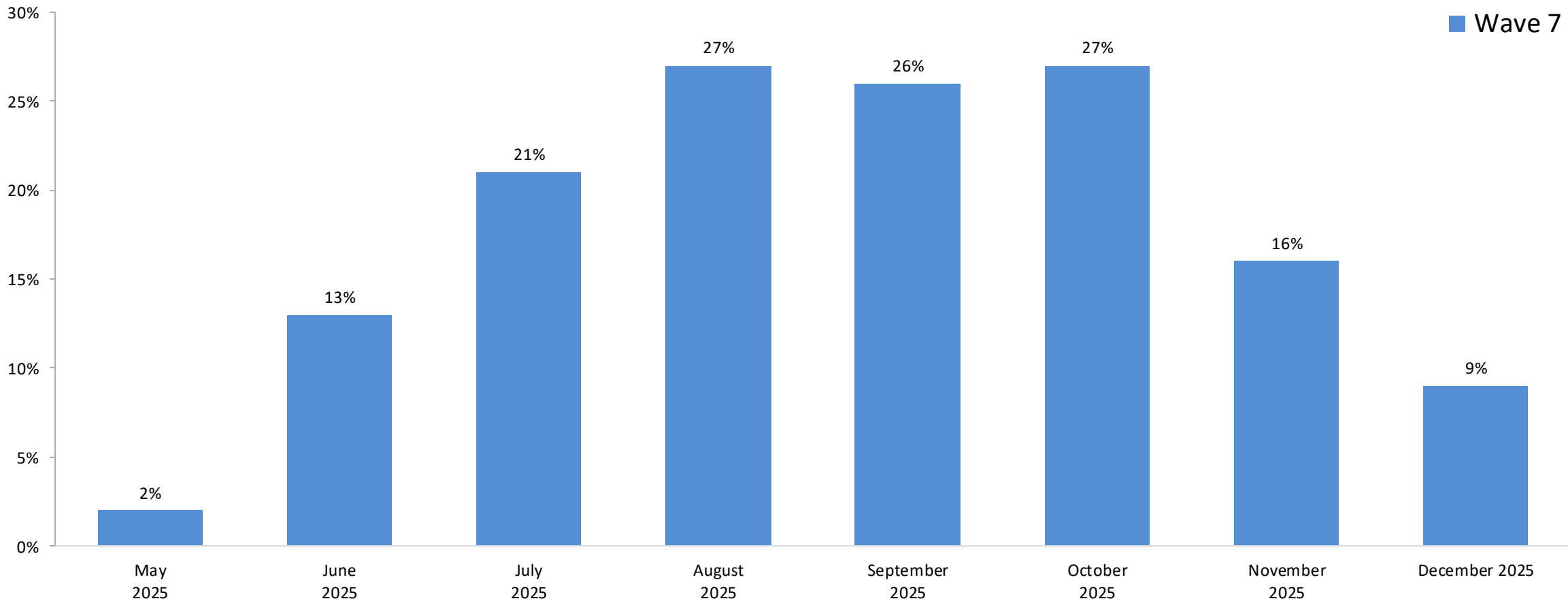


Key Insight 4



Month Considering Visitation

Likely
Travelers

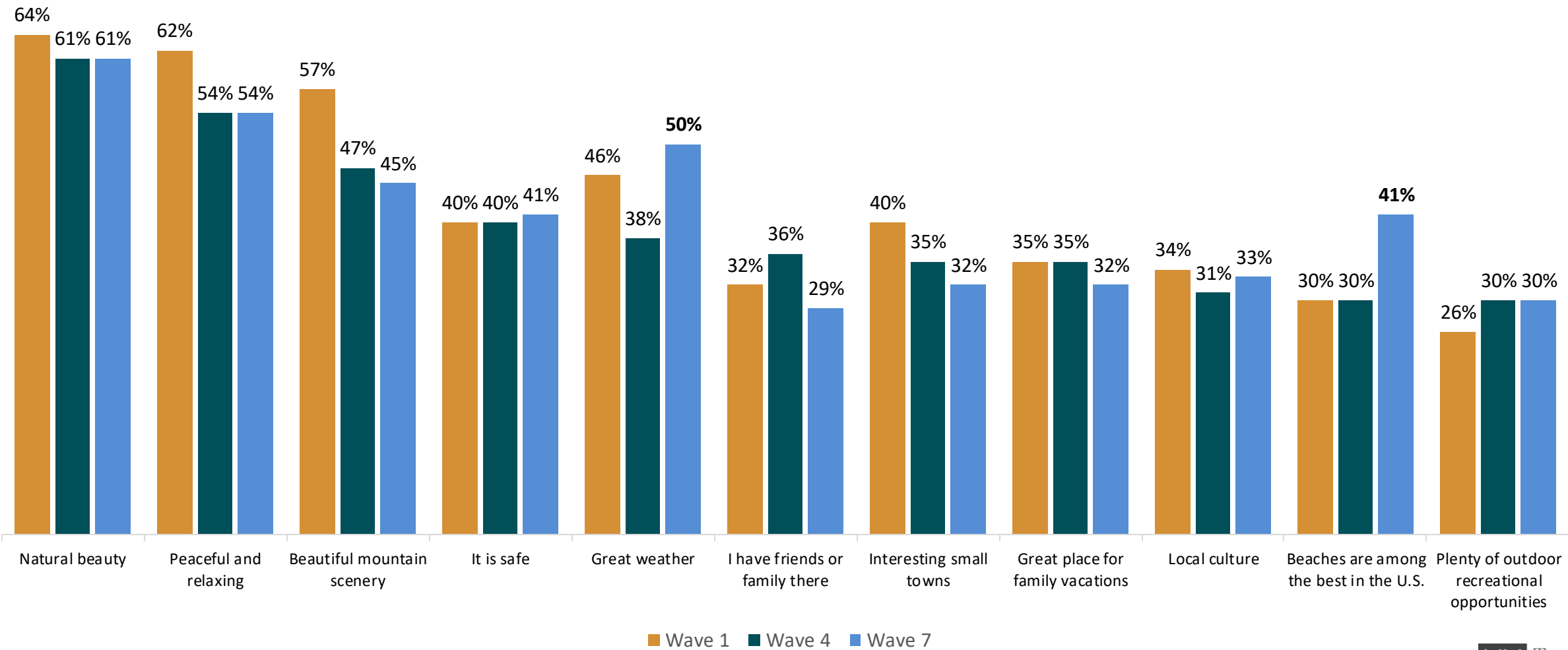


Key Insight 1



Reasons Considering Visiting North Carolina

Likely
Travelers



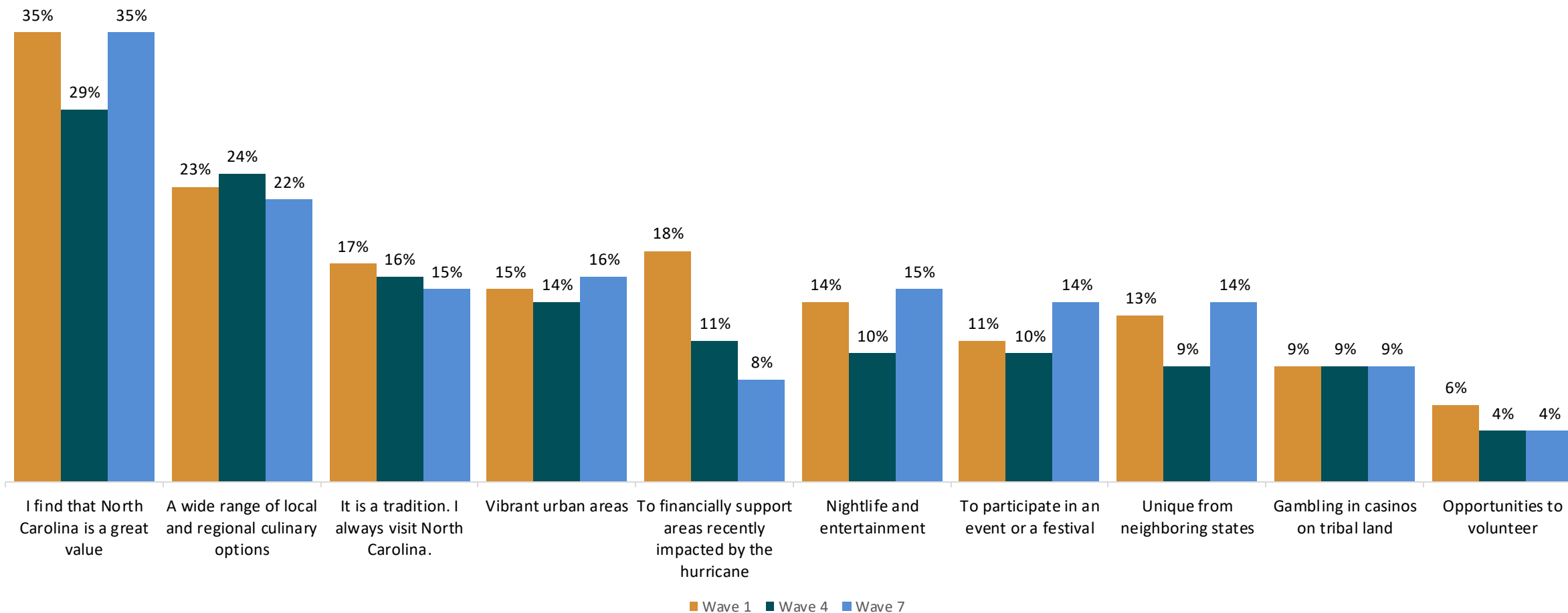
Key Insight 1

Base: Wave 7 Likely North Carolina Travelers (n=224)



Reasons Considering Visiting North Carolina (cont.)

Likely Travelers



Key Insight 1

Key

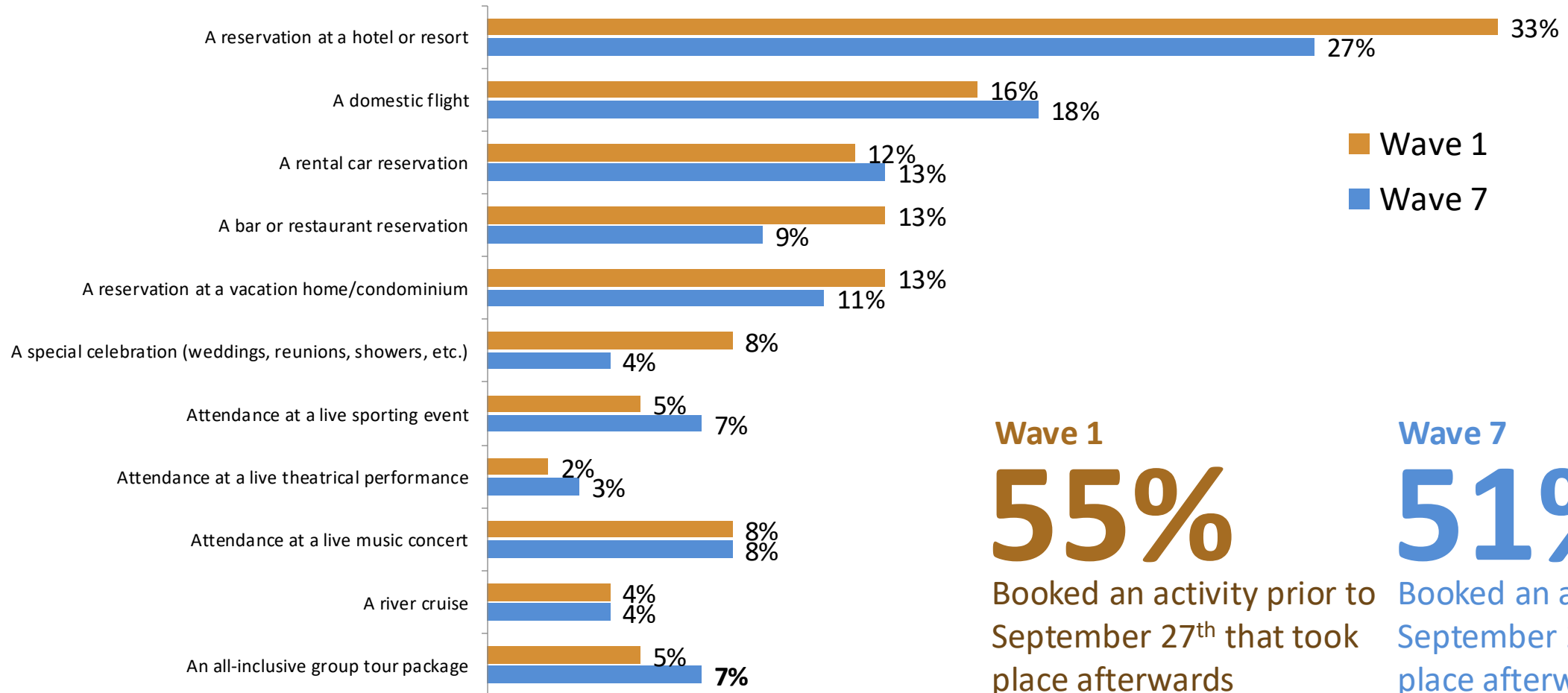
INSIGHT #4

Of respondents who expressed disinterest in visiting the mountain regions, 3 in 10 prefer other types of destinations or were unfamiliar with the region's attractions. Concern about the destination's readiness after the hurricane dropped to 12% compared to 18% in Wave 4 and remains well below Wave 1 (23%).



Past
Travelers

Activities Booked Prior to September 27th, 2024



Wave 1
Wave 7

Wave 1

55%

Booked an activity prior to
September 27th that took
place afterwards

Wave 7

51%

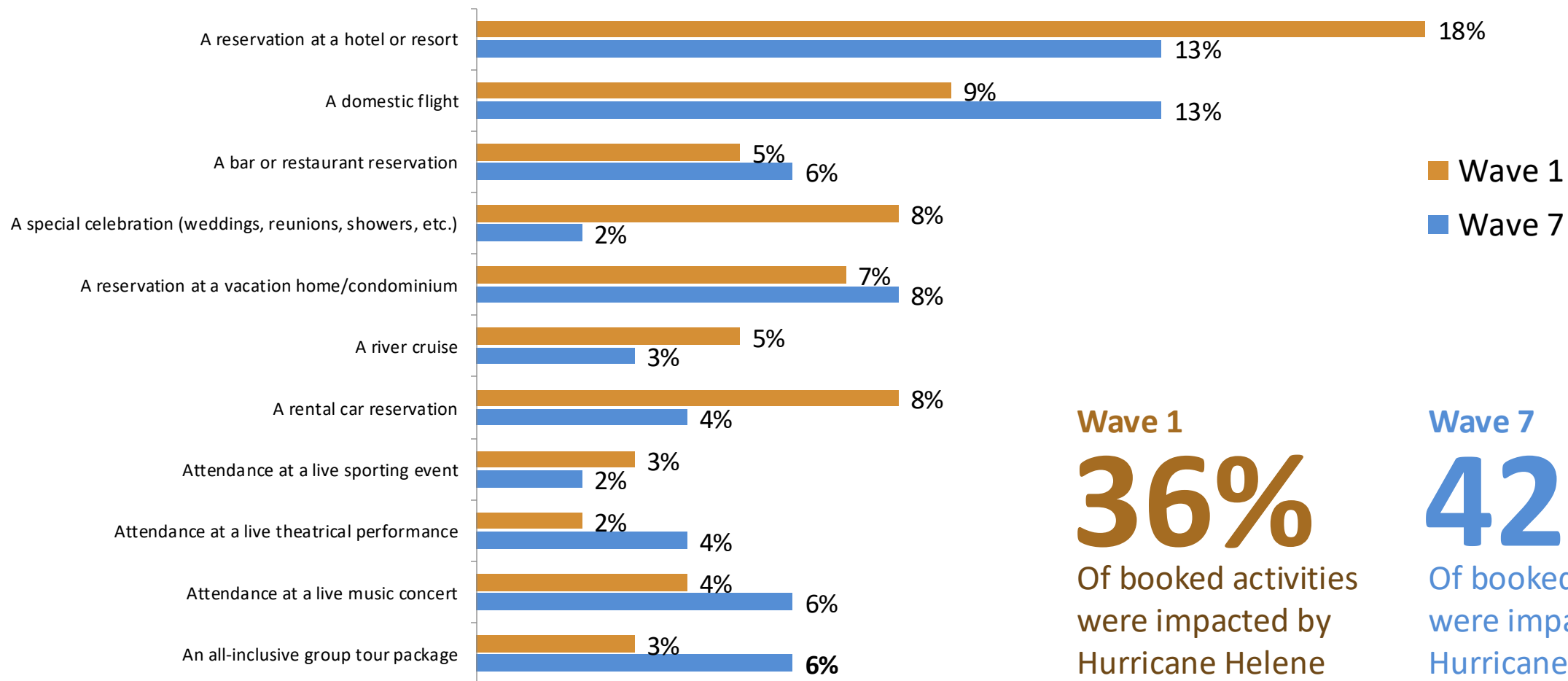
Booked an activity prior to
September 27th that took
place afterwards

Key Insight 4



Past
Travelers

Activities Impacted by Hurricane Helene



Wave 1
Wave 7

Wave 1
36%
Of booked activities
were impacted by
Hurricane Helene

Wave 7
42%
Of booked activities
were impacted by
Hurricane Helene

Key Insight 4

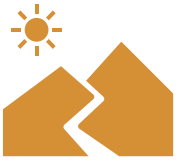


Past
Travelers

How Activities Were Impacted

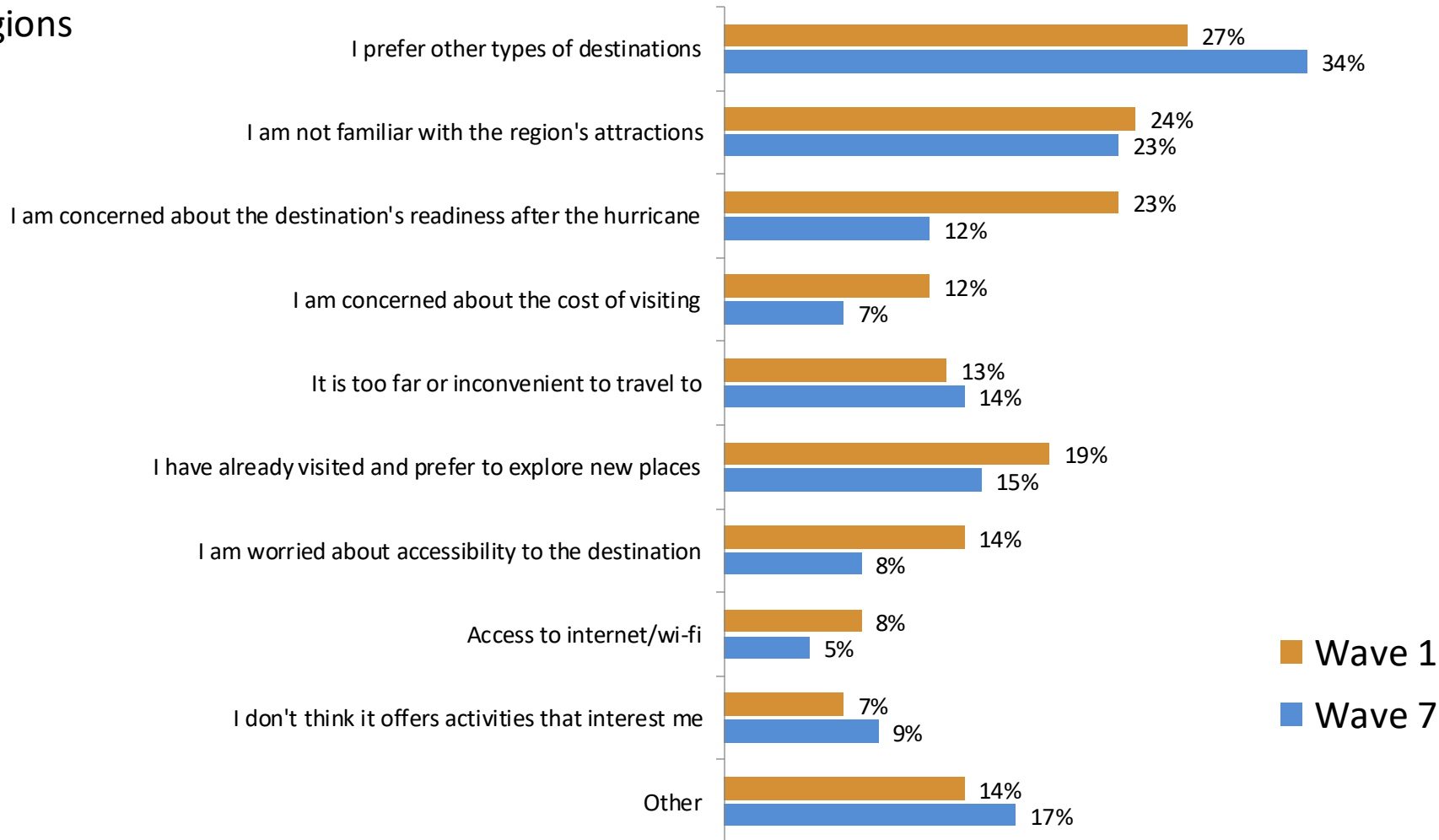
	Wave 1	Wave 7	Wave 1	Wave 7	Wave 1	Wave 7
	Cancelled Plans	Cancelled Plans	Postponed Plans	Postponed Plans	Continuing as Planned	Continuing as Planned
A reservation at a hotel or resort	3%	1%	4%	4%	52%	47%
A domestic flight	3%	3%	3%	3%	23%	28%
A bar or restaurant reservation	1%	0%	1%	1%	21%	17%
A rental car reservation	2%	0	1%	4%	19%	21%
A reservation at a vacation home/condominium	N/A	1%	4%	2%	19%	19%
A special celebration (weddings, reunions, showers, etc.)	N/A	N/A	1%	1%	14%	6%
Attendance at a live music concert	N/A	2%	2%	3%	13%	10%
An all-inclusive group tour package	1%	1%	N/A	2%	7%	11%
A river cruise	2%	0%	N/A	3%	5%	5%
Attendance at a live sporting event	1%	0%	3%	2%	5%	11%
Attendance at a live theatrical performance	N/A	0%	N/A	2%	4%	4%

Key Insight 3



Reasons for Disinterest in Visiting Mountain Regions

Disinterest in Mountain Regions



Travelers who were not interested in visiting North Carolina mountain regions primarily cited a preference for other types of destinations or were not familiar with the region's attractions.

Concern surrounding post-hurricane readiness decreased to 12%, nearly cutting the concern in half compared to Wave 1 (23%). This will need to be monitored across the coming waves to see if this begins to drop again as we move further from the impact of Hurricane Helene.



Things from the media that have impacted your view of North Carolina's Mountain regions

Disinterest in
Mountain Region
Travelers

Hurricane Helene that led to concerns of safety, infrastructure damage, and economic impact.

Quiet cabins, retreats, and cozy mountain towns, ideal for unplugging. Places like Boone, Blowing Rock, and Highlands get press as romantic or family-friendly escapes.

After last year's hurricanes there are parts of the mountain that still have damages and no power and have no access

It is an unforgettable experience

Weather – hurricane and damages sustained

It has some of the oldest mountains, diverse ecosystems and Cherokee heritage

I do not hear much, but when I do it seems to positively influence me by highlighting the natural beauty of the area.

*Full verbatim responses can be found in a separate file



Changes or improvements that could make you feel more comfortable visiting North Carolina's Mountain regions

Disinterest in
Mountain
Region
Travelers

If I were able to confirm the region is ready for visitors.

If there was a concert or other attraction in the mountains, I would probably visit, or if the politics were better, I might, but there's not much that would make it likely for me to visit.

If I were able to confirm the region is ready for visitors.

I would like to learn more about this part of North Carolina. Then I would know if it is worth the visit.

Some mountain areas can be hard to reach without a car, and public transit options are limited.

Better infrastructure access and more unique things to do while showing off the culture in that region.

Some positive news as to the recovery efforts.

*Full verbatim responses can be found in a separate file



Important Resources to Feel Confident Traveling to North Carolina After any Hurricane

Potential Travelers

Top 2 box (very/extremely important)

	Wave 1	Wave 7
Information on traveling to/from my destination	82%	84%
Access to real-time weather updates	80%	84%
Up-to-date information on hurricane recovery efforts (e.g., roads, infrastructure)	80%	80%
Information regarding the accessibility of regions affected by a recent hurricane/natural disaster	79%	80%
Clear safety protocols (e.g., evacuation plans, emergency contacts)	76%	79%
Information on major tourist attractions, accommodations and/or events	78%	78%
Information regarding the availability of medical and emergency services	74%	77%
Discounts/incentives to encourage visitation and support recovery efforts	66%	67%
Testimonials from other travelers who have visited after a hurricane	65%	66%
Travel insurance that covers hurricane-related disruptions	62%	64%
Testimonials or information from NC residents about wanting tourism back in their area	60%	60%

Key Insight 3



Important Resources to Feel Confident Traveling to North Carolina After Hurricane Helene

Potential
Travelers

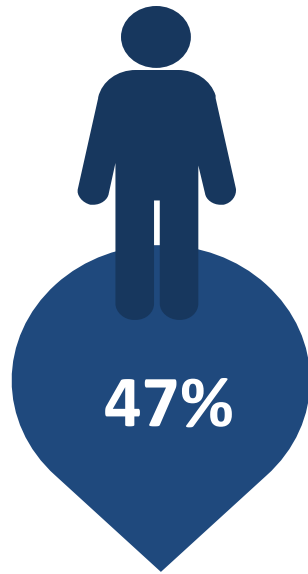
Top 2 box (very/extremely important)

	Wave 1	Wave 7
Information on traveling to/from my destination	82%	82%
Access to real-time weather updates	79%	81%
Information regarding the accessibility of regions affected by a recent hurricane/natural disaster	78%	79%
Up-to-date information on hurricane recovery efforts (e.g., roads, infrastructure)	80%	78%
Information on major tourist attractions, accommodations and/or events	77%	78%
Clear safety protocols (e.g., evacuation plans, emergency contacts)	76%	78%
Information regarding the availability of medical and emergency services	75%	76%
Testimonials from other travelers who have visited after a hurricane	66%	67%
Discounts/incentives to encourage visitation and support recovery efforts	65%	67%
Travel insurance that covers hurricane-related disruptions	61%	66%
Testimonials or information from NC residents about wanting tourism back in their area	62%	61%

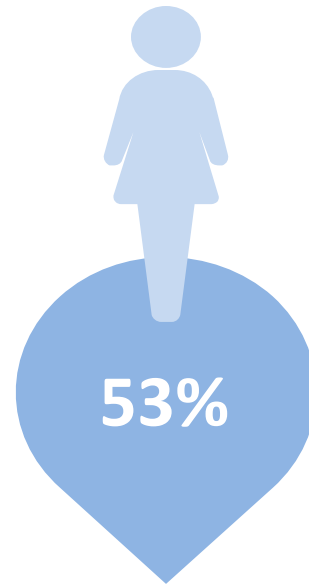
Key Insight 3

Respondent **DEMOGRAPHICS**

Total
Respondents



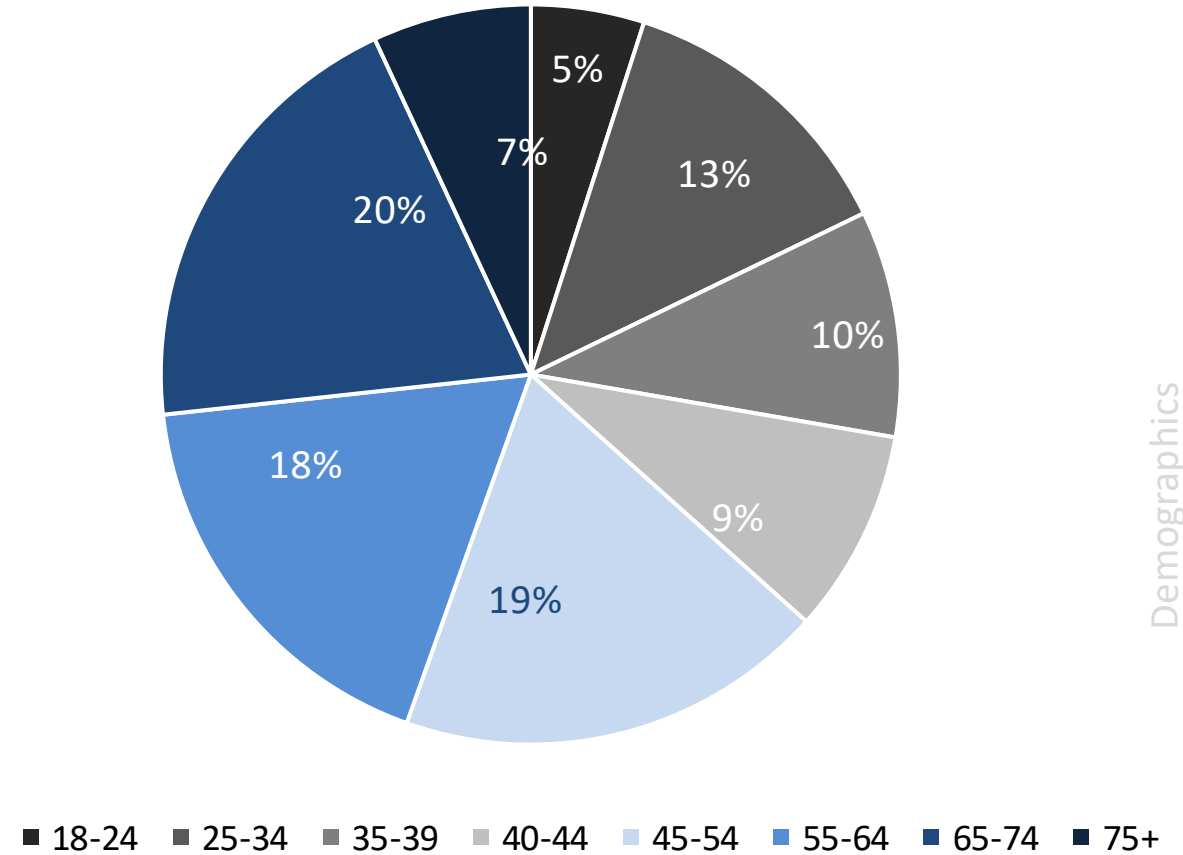
Male



Female

Gender

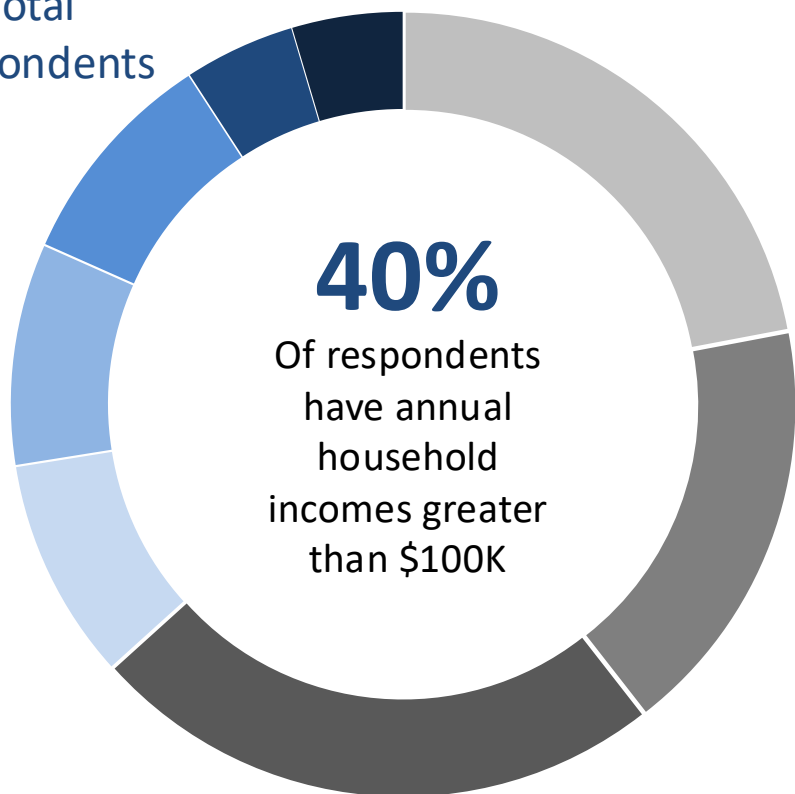
Age



Mean Age: 52 years old



Total
Respondents



- Less than \$50K
- \$50K–\$74,999
- \$75K–\$99,999
- \$100K–\$124,999
- \$125K–\$149,999
- \$150K–\$199,999
- \$200K–\$249,999
- \$250K+

Base: Wave 7 Total Respondents (n=2,000), Past Travelers (n=193), Interested Travelers (n=242)

Annual Household Income	Total
Less than \$50K	24%
\$50K–\$74,999	19%
\$75K–\$99,999	16%
\$100K–\$124,999	10%
\$125K–\$149,999	10%
\$150K–\$199,999	10%
\$200K+	10%

Demographics

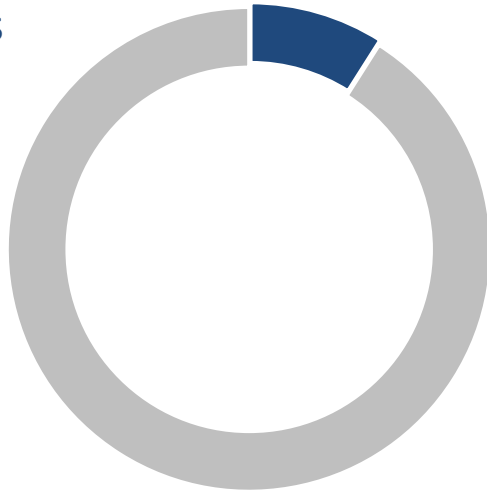
Mean Annual Income

Total Respondents: \$112,200
Past Travelers: \$118,200
Interested Travelers: \$118,700



Total
Respondents

Ethnicity



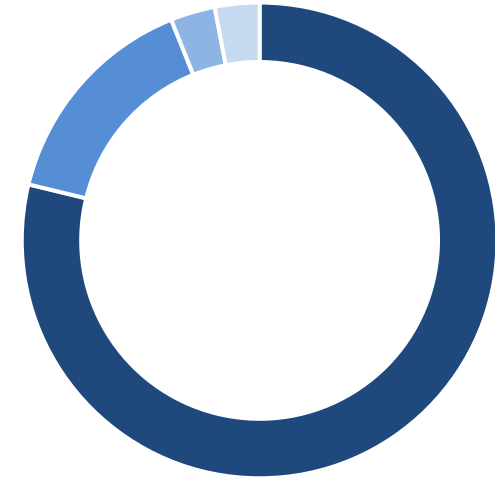
9%

Of respondents
identify as
Hispanic, Latino, or
Spanish Origin

	Total
Hispanic or Latino (of any race)	9%
Not Hispanic or Latino	91%

78%

Of respondents
identify as “White”



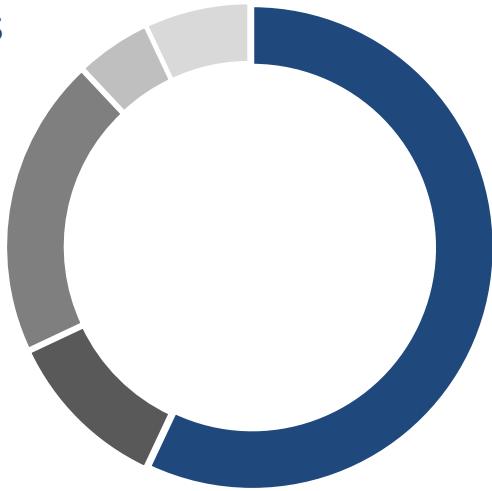
	Total
White	78%
African American/Black	15%
Asian	3%
Other race	3%

Demographics



Marital Status

Total
Respondents



54%

Of respondents
are married

	Total
Married	57%
Never married	20%
Unmarried couple living together	7%
Divorced or Separated	11%
Widowed	5%

Children in Household

3 in 10

Of leisure travelers surveyed have at least one child within their household.

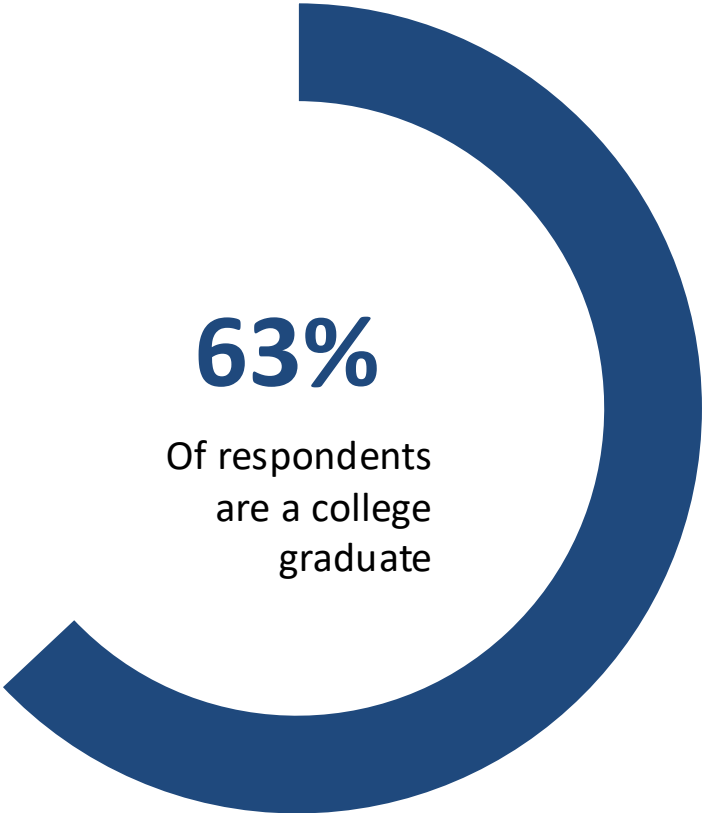
Do you consider yourself to be...

	Total
Heterosexual	93%
Bisexual	4%
Gay	2%
Lesbian	1%

Demographics



Education Level



Highest level of education achieved	Total
High school graduate	13%
Some college	23%
Graduated college	38%
Post graduate degree	25%

Demographics

Base: Wave 4 Total Respondents (n=2,000), Past Travelers (n=193), Interested Travelers (n=319)



thank you



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