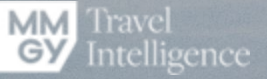


# *North Carolina Visitor Sentiment*

Perceptions, Insights and Pathway to Post-Hurricane Recovery



**Performance Tracker**  
**Wave 8 June 2025 Fielding**

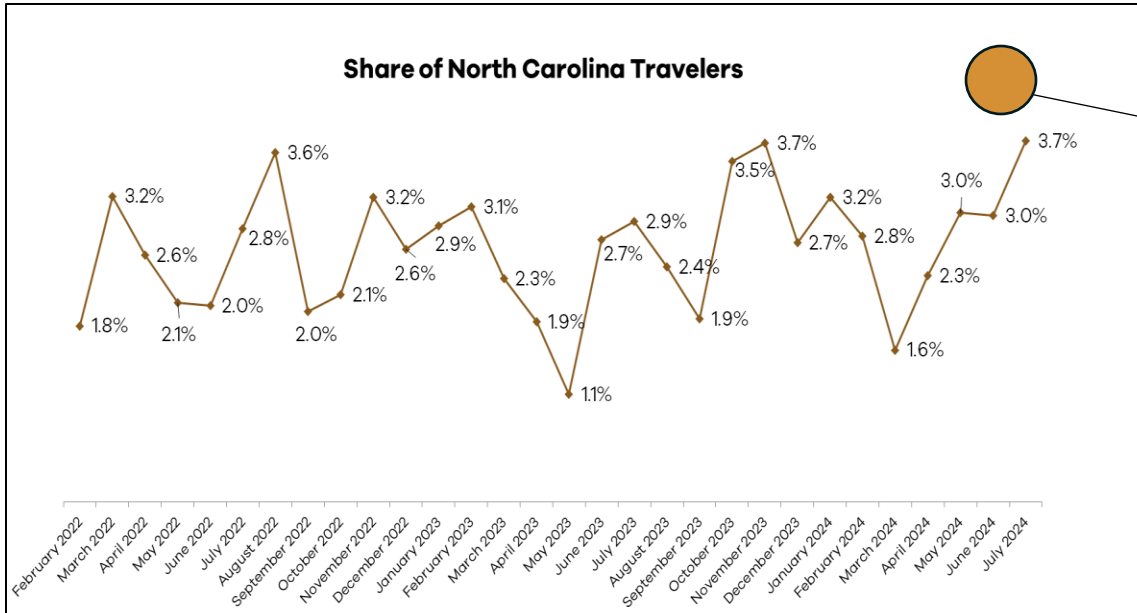


# *Study* METHODOLOGY

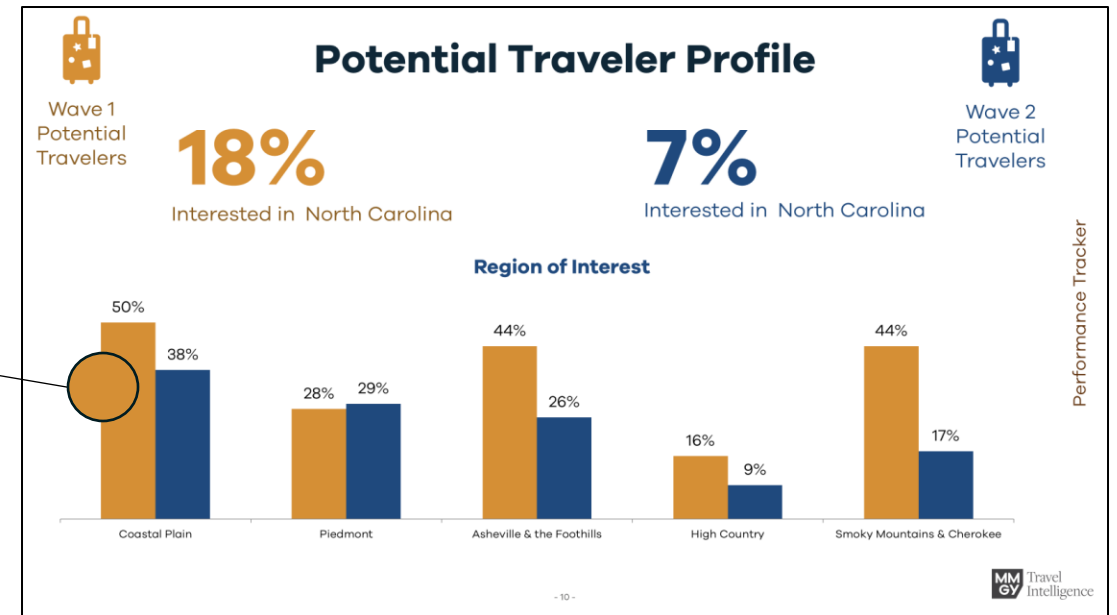
# Survey Methodology

- **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.
- The Performance Tracker is an addendum which serves to add additional monitoring data on a monthly basis, with a focus on key insights into the travel behaviors and perceptions of North Carolina travelers. Share analysis targeted the following key 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)
- The survey results highlighted in this report originate from the June 2025 Performance Monitor. Respondents were asked for information around their past 3 months of travel- for this Performance tracker, this includes the months of April, May, and June 2025. Data were tabulated and analyzed by MMGY Travel Intelligence.

# How to Interpret the Tracker



The share of North Carolina travelers utilizes syndicated data from the Performance Monitor. This survey focuses on past travel for the past 1-3 months. The share of North Carolina travelers indicates what proportion of leisure travelers in the US traveled to North Carolina within a specific month, compared to overall US leisure travel.



The Wave of the study and associated color is indicated in the legends. Timing for the fielding of Waves is as follows:

- Wave 1: November 2024 (Custom Survey)
- Wave 2: December 2024 (Performance Tracker)
- Wave 3: January 2025 (Performance Tracker)
- Wave 4: February 2025 (Custom Survey)
- Wave 5: March 2025 (Performance Tracker)
- Wave 6: April 2025 (Performance Tracker)
- Wave 7: May 2025 (Custom Survey)
- Wave 8: June 2025 (Performance Tracker)

Data is compared across Waves to indicate shifts in respondent perception over time.

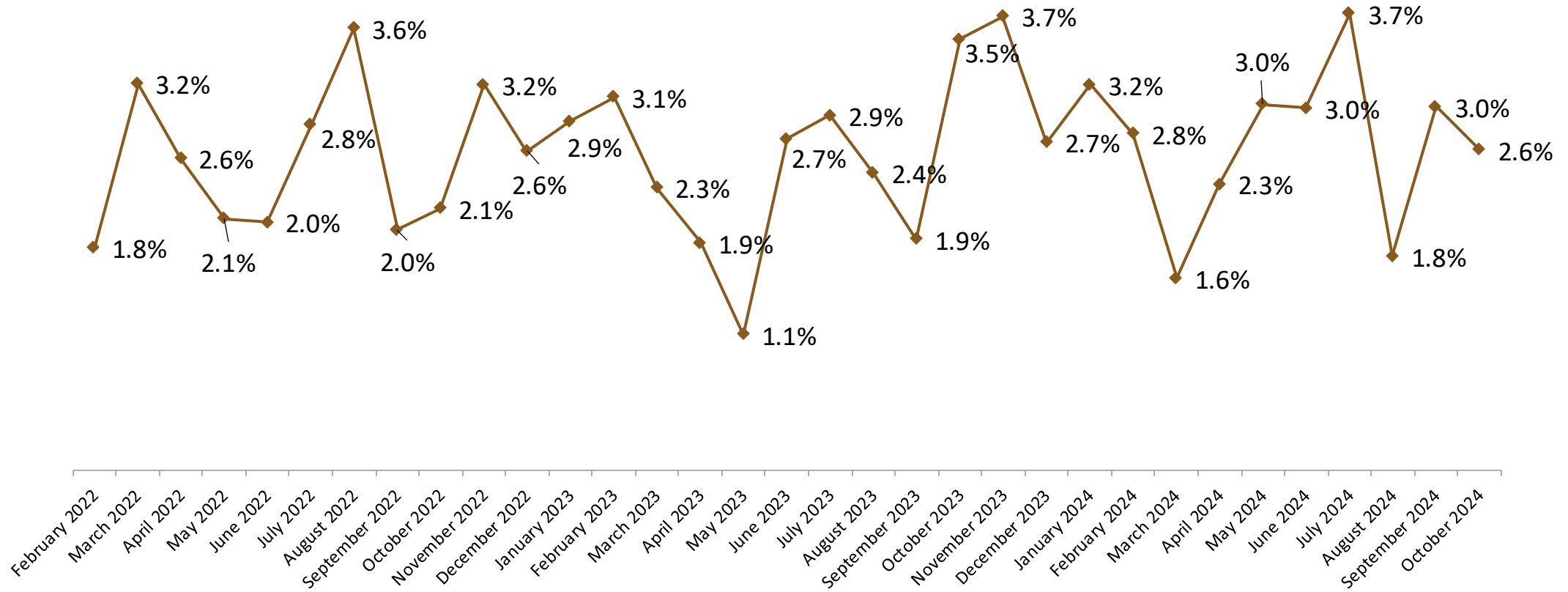
# *Performance* **Tracker**



Past  
Travelers

# Performance Traveler

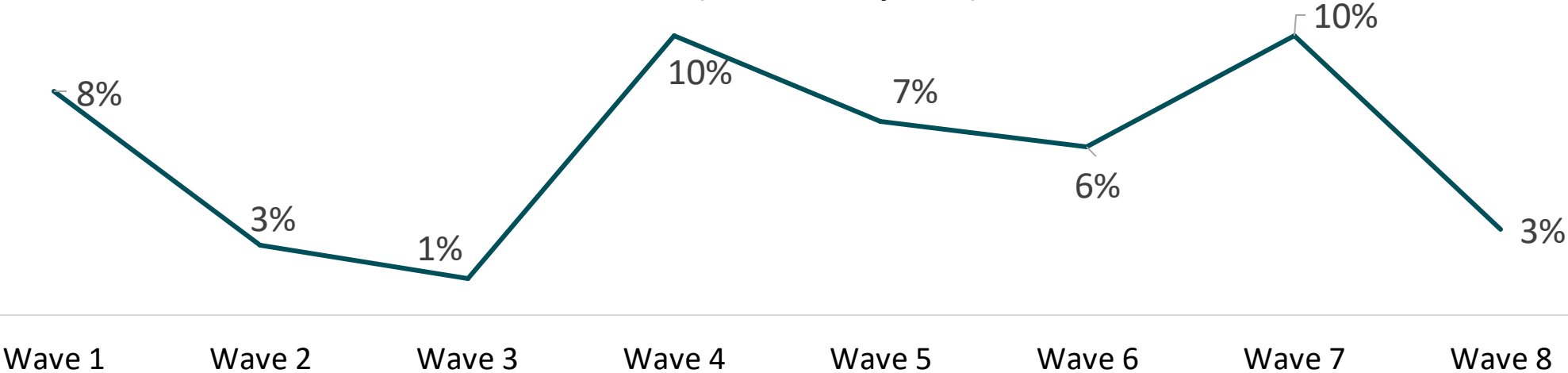
## Share of North Carolina Travelers



Performance Tracker

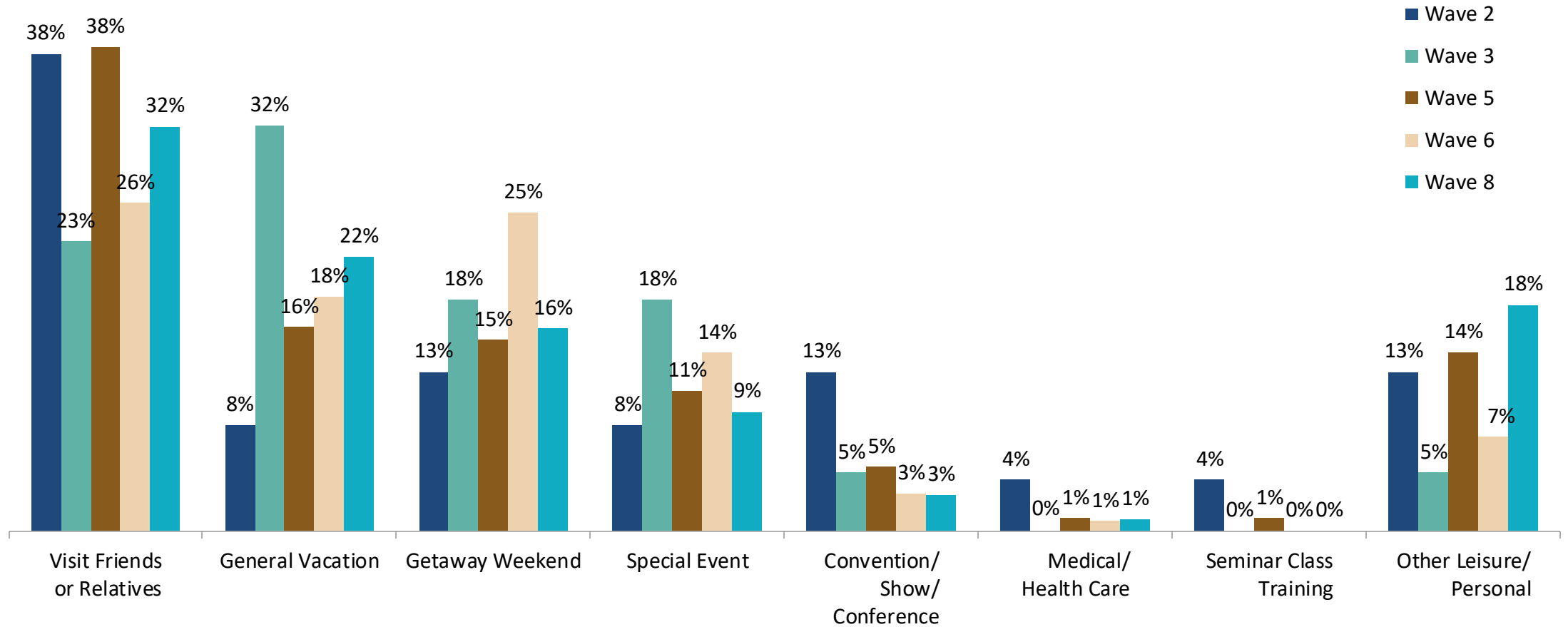
# NC shares and Trips

Share of Travel (since January 2024)



Past Travelers	Mean number of nights (for overnight trips)	Past Travelers	Mean number of nights (for overnight trips)
Wave 1	4.2	Wave 5	3.7
Wave 2	3.5	Wave 6	3.2
Wave 3	2.8	Wave 7	3.9
Wave 4	4.2	Wave 8	3.4

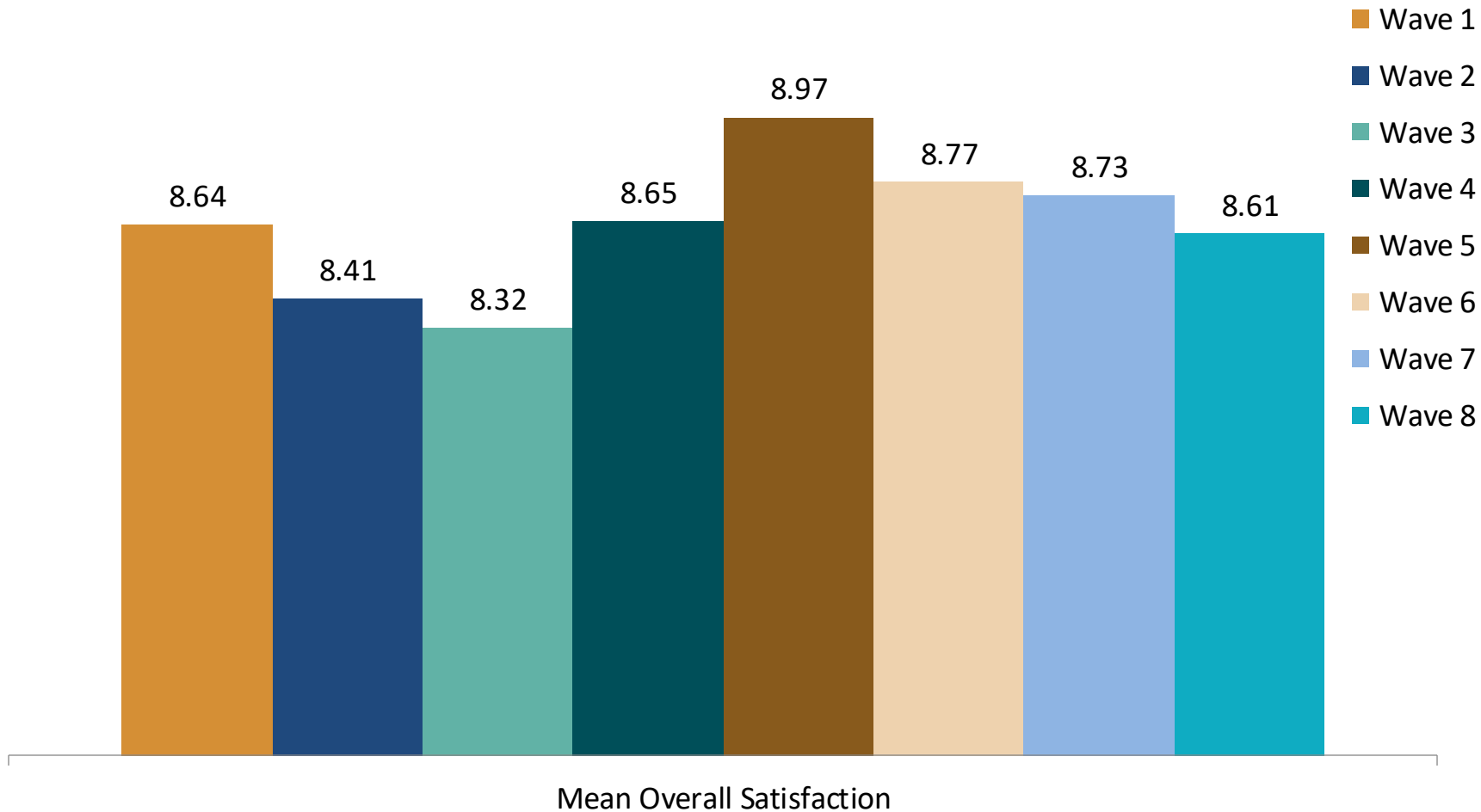
# NC Travel Purpose



Performance Tracker

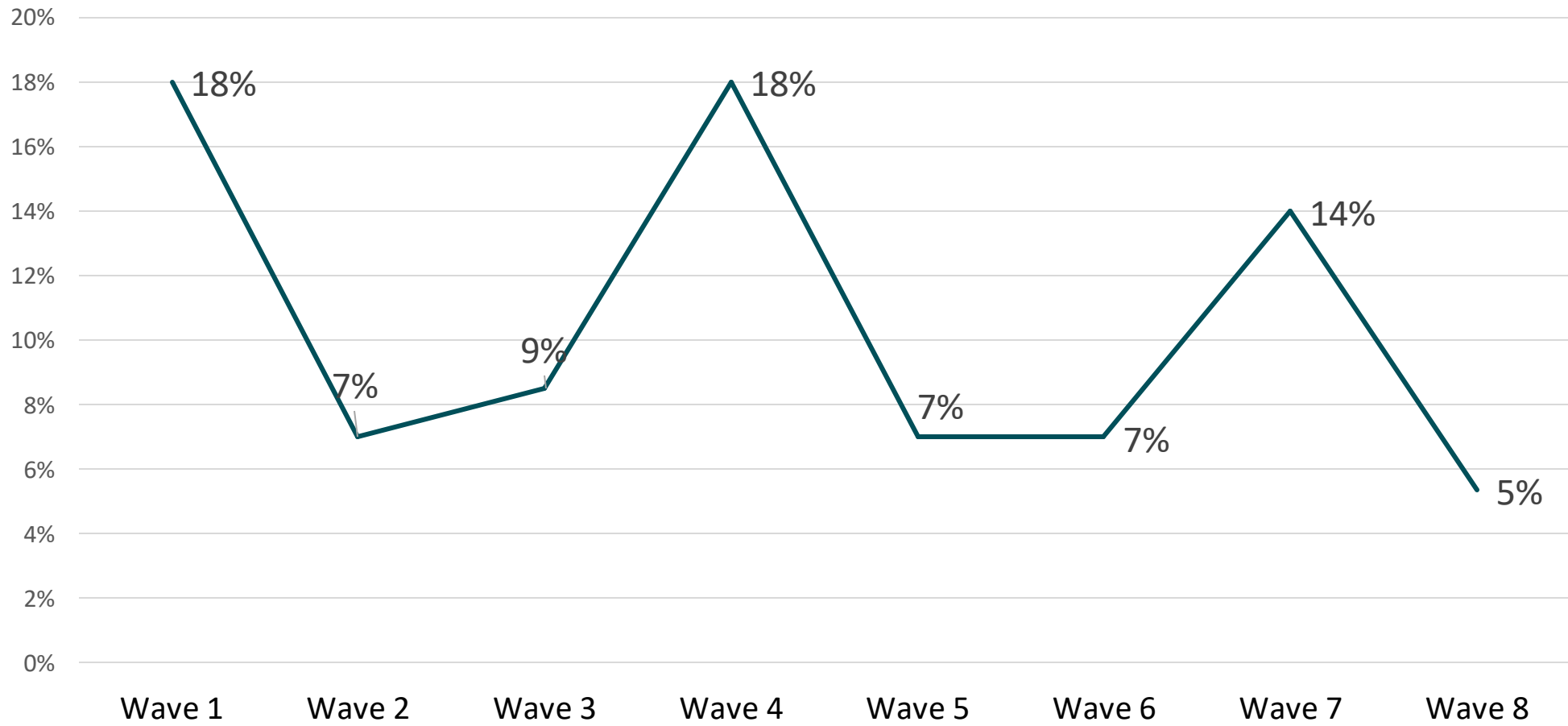


# Satisfaction



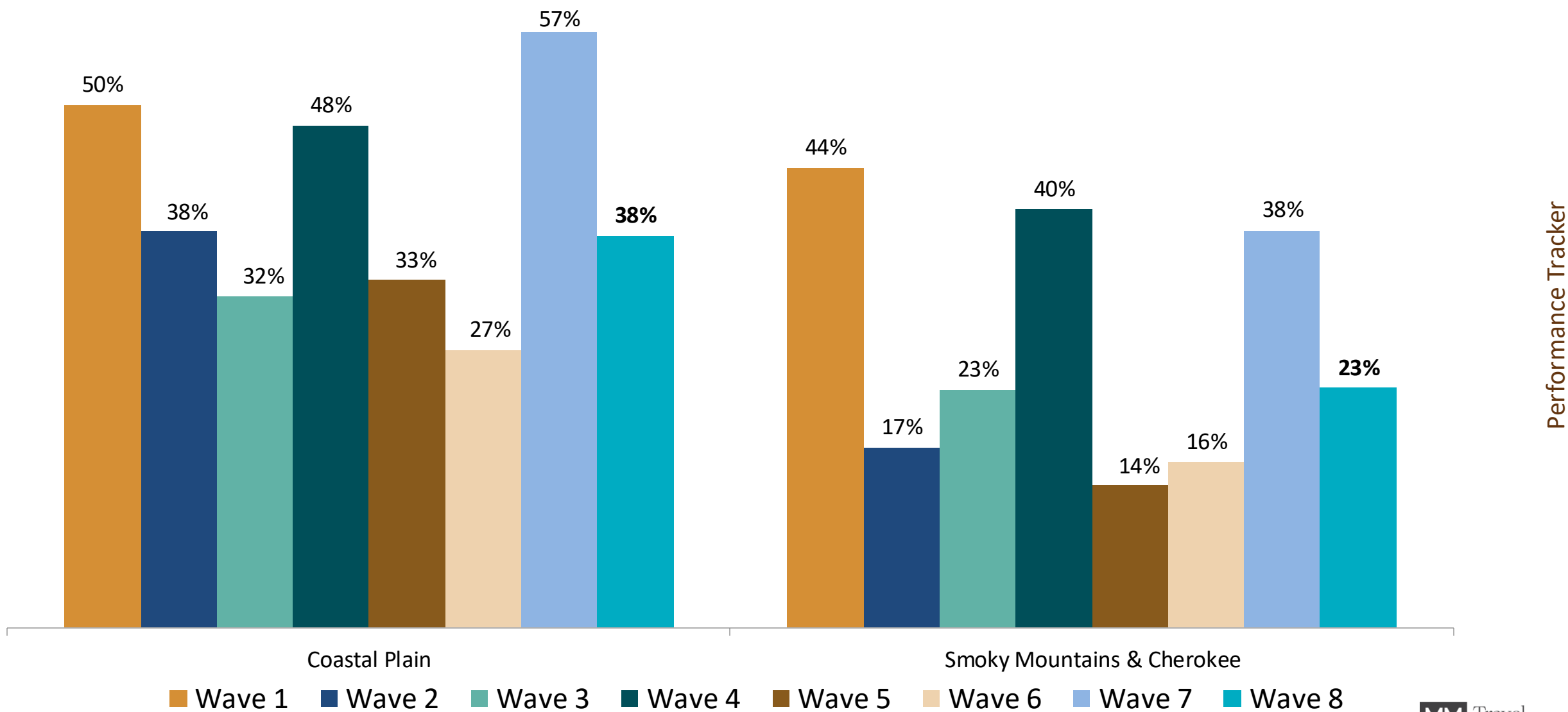
North Carolina visitors continue to leave the state feeling very satisfied. Fifty-seven percent of respondents rated North Carolina a 9 or 10 on a 10-point satisfaction scale, and only 3% of respondents considered their experience poor (rating of 4 or below).

# Interest in Visiting North Carolina before December 2025

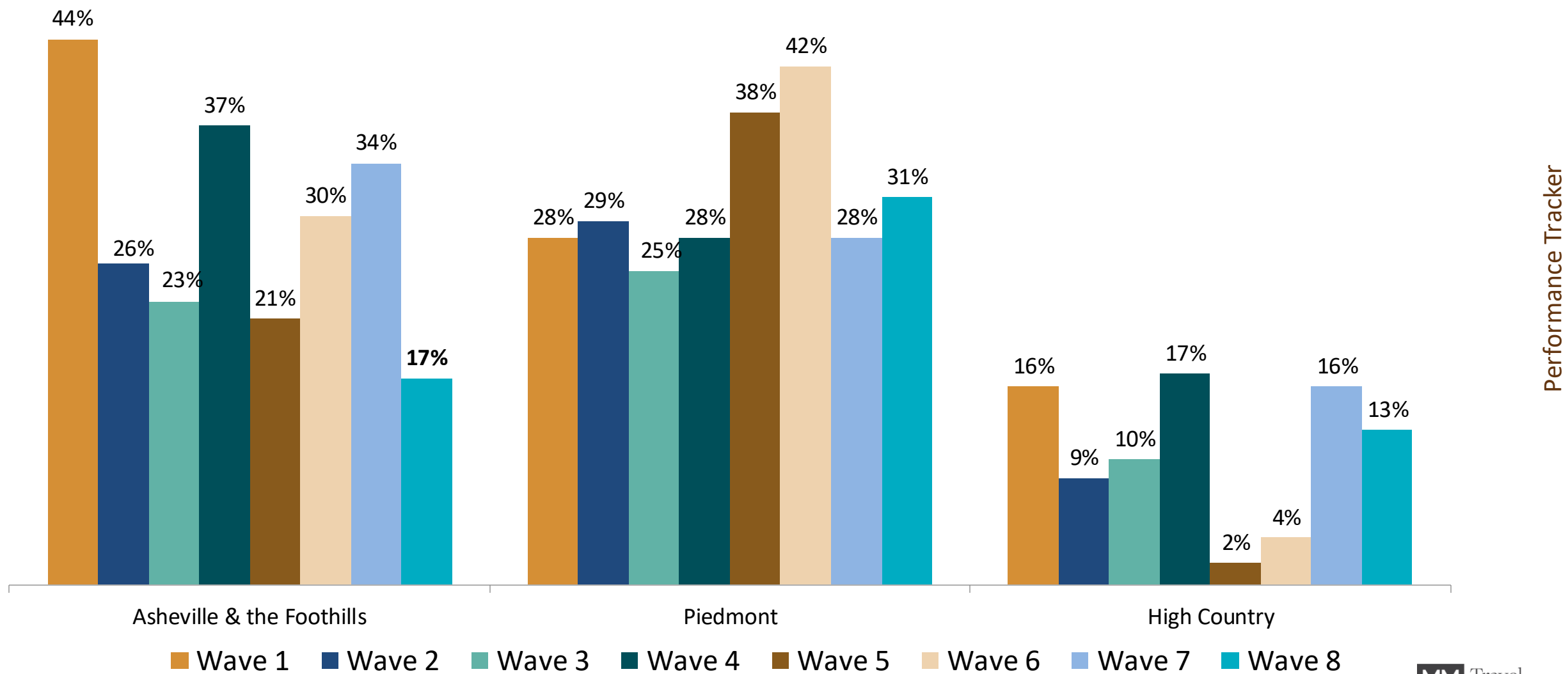


Performance Tracker

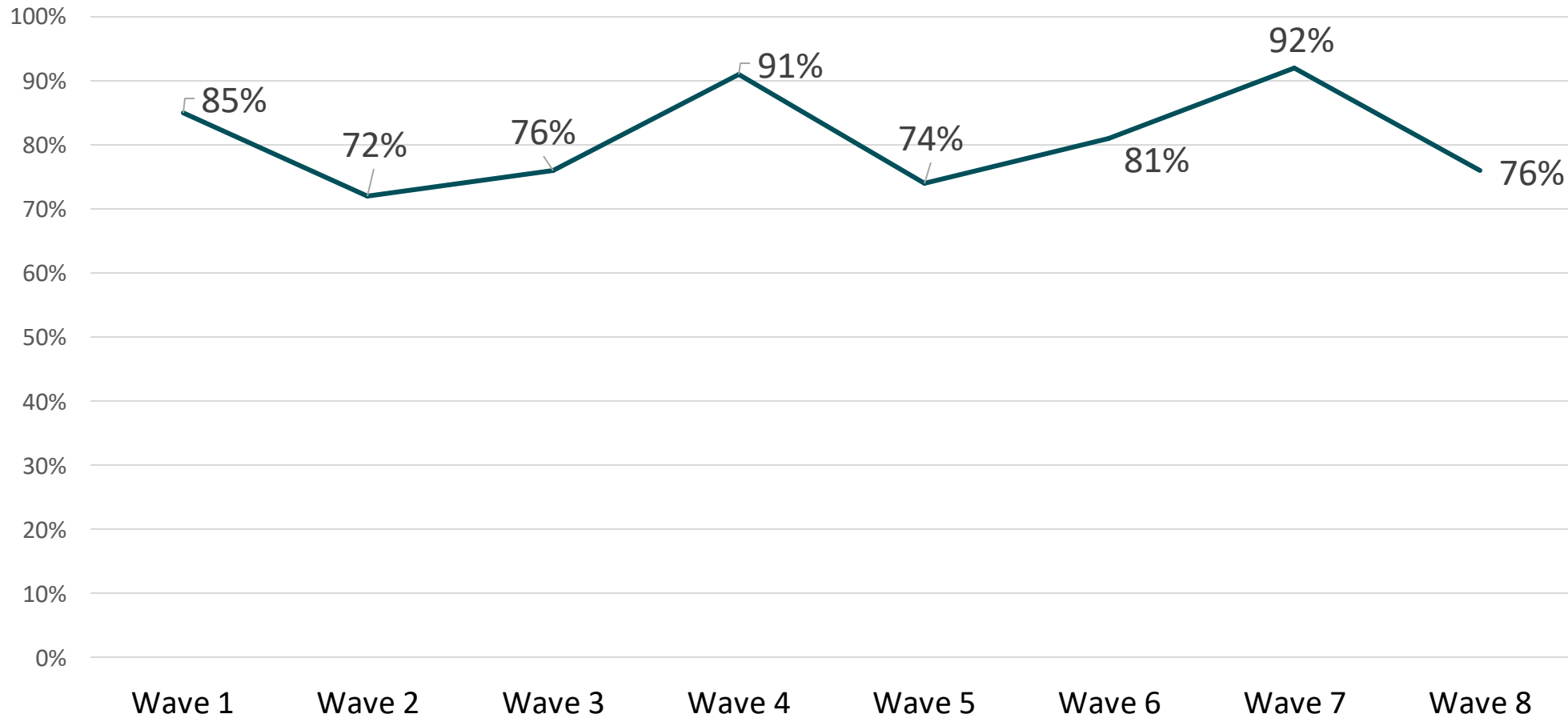
# Regions of Interest



# Regions of Interest



# Likelihood of Traveling to North Carolina before Dec. 31<sup>st</sup> 2025 (of those interested)

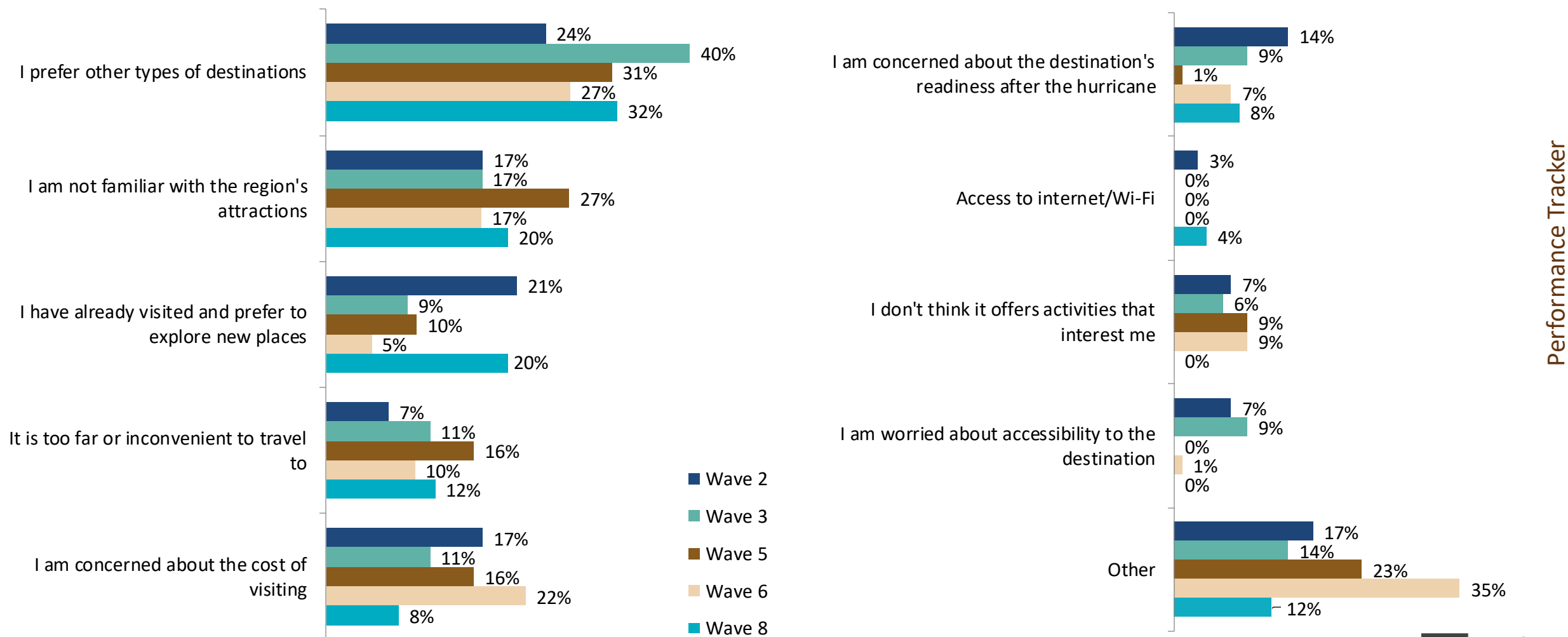


Performance Tracker



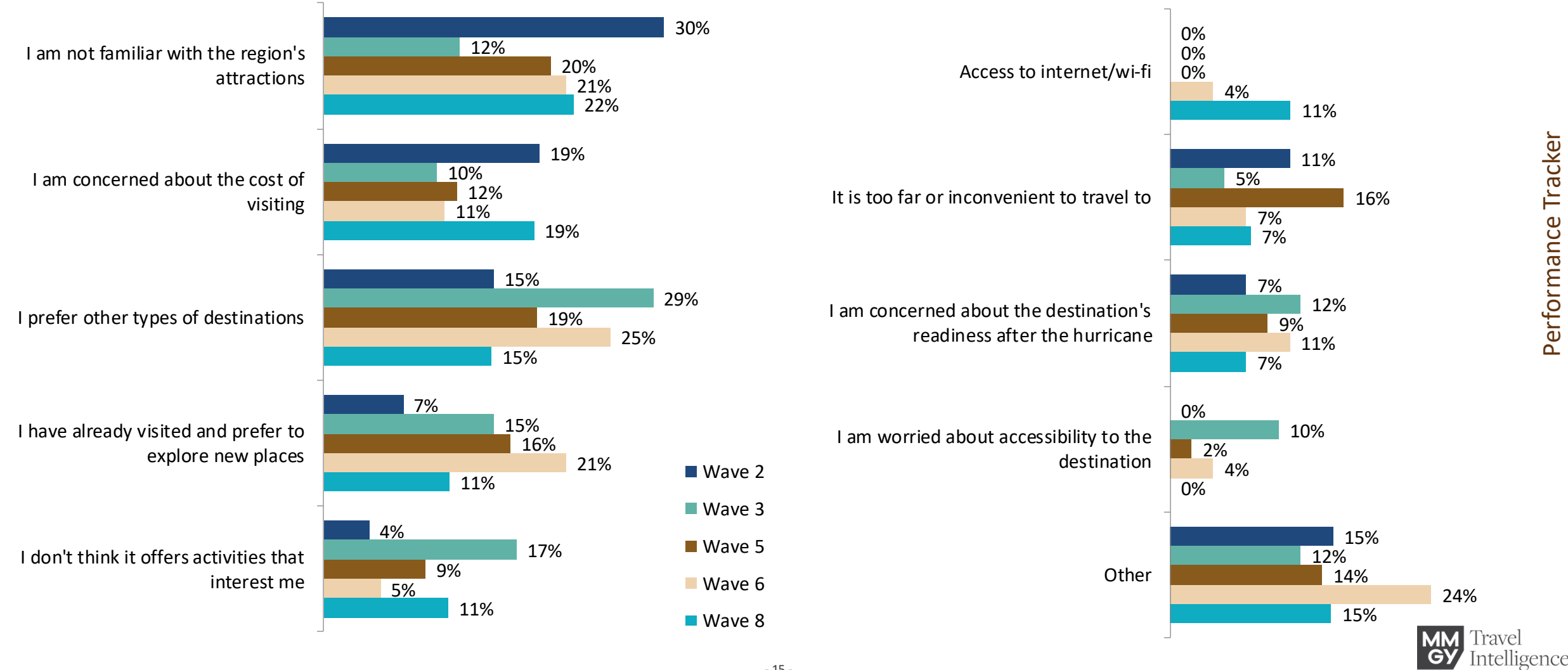


# Reasons for Disinterest in Visiting Mountain Regions



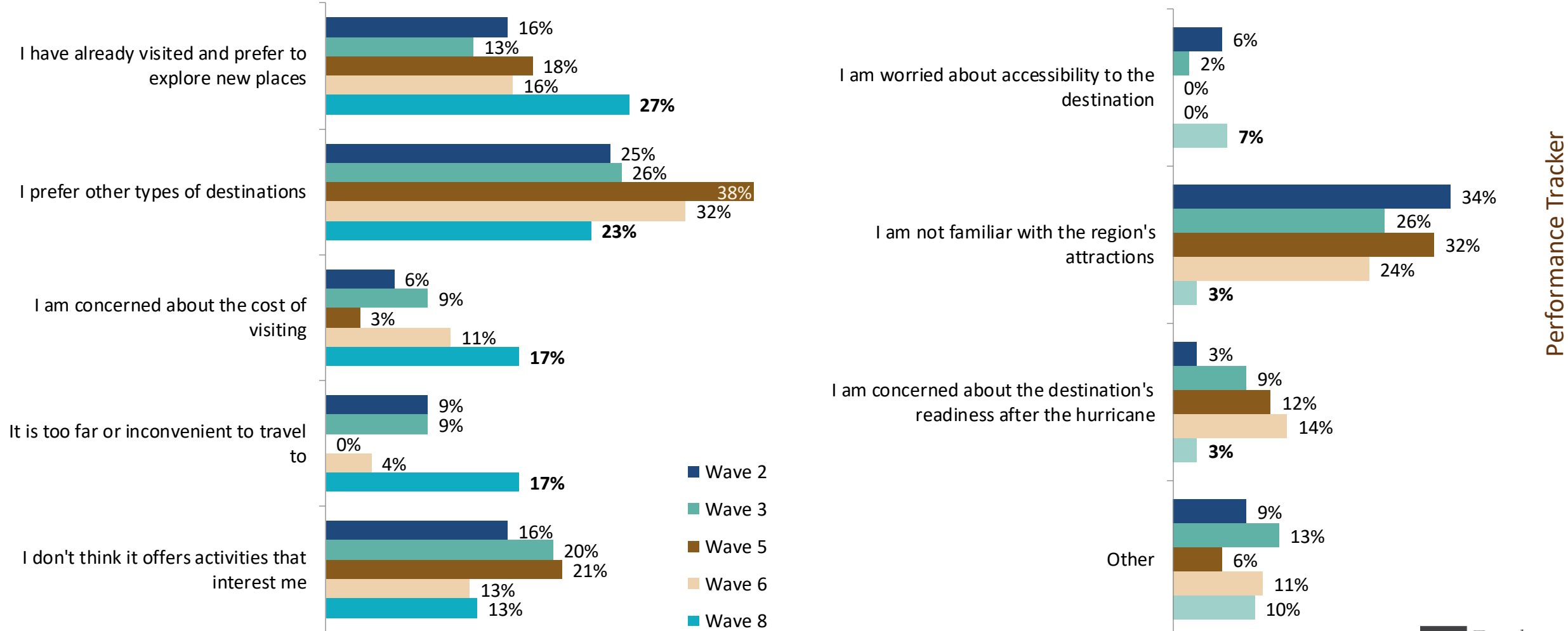


# Reasons for Disinterest in Visiting Coastal Plain Regions





# Reasons for Disinterest in Visiting Piedmont Region



Performance Tracker



*thank you*



Travel  
Intelligence

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