

2025 NORTH CAROLINA REGIONAL VISITOR PROFILE

A Profile of Visitors to the Coastal, Mountain and Piedmont Regions

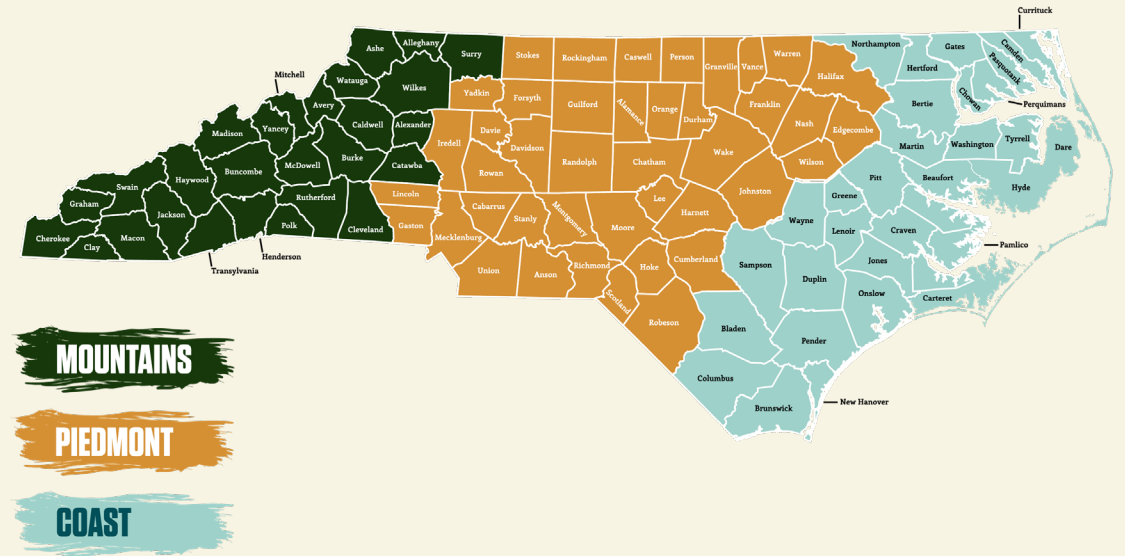
Visit North Carolina



BACKGROUND

- Visit North Carolina contracts with OmniTrak Group, Inc. for visitor data through its TravelTrakAmerica product.
- Each month, TravelTrakAmerica conducts over 9,000 internet-based interviews among past 12-month travelers who traveled more than 50 miles from home.
- Information collected includes purpose of trip, mode of travel, party characteristics, accommodations, activities, spending and demographics. Data are weighted to match US Census variables.
- This report profiles visitors to the three geographic regions of North Carolina: Coastal, Mountain and Piedmont. A glossary of key terms appears at the end of this report.

VISIT NORTH CAROLINA REGIONS



2025 MOUNTAIN VISITOR SUMMARY

- 84.9% of Mountain Region overnight visitors traveled for leisure purposes; 4.4% for business.
- Summer and December were peak seasons.
 - July led at 12.2%, followed by December (11.8%) and April (10.6%).
- 55.8% of overnight visitors stayed in a hotel/motel; 24.9% stayed with friends or family; 13.2% used shared economy lodging.
- Top states of origin for Mountain Region overnight visitors in 2025: NC, SC, GA, TN, FL, VA, CA, NY, PA, OH, IN.

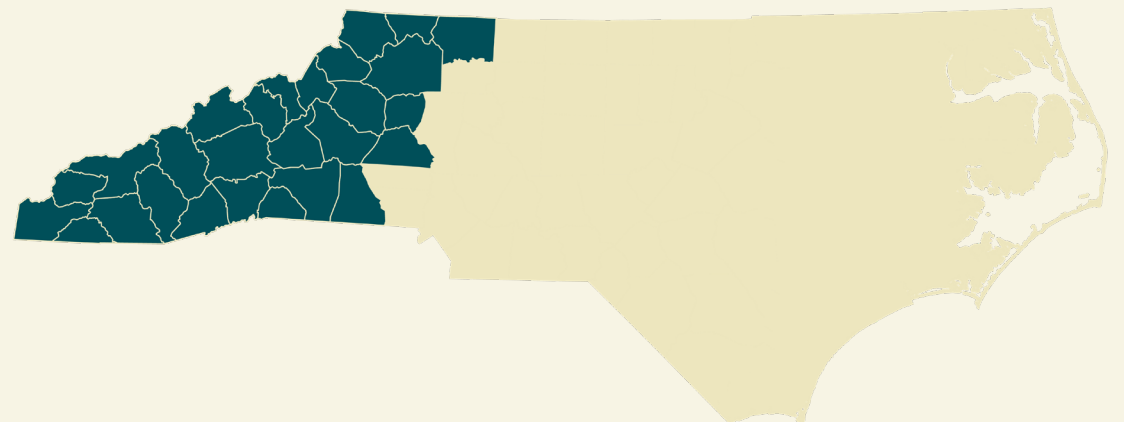
17.4%
First-Time Visitors

\$882
Avg Trip Spend

81.5%
Overnight Visitor Share

83.4%
Traveled by Personal Auto

VISIT NORTH CAROLINA MOUNTAIN REGION



2025 PIEDMONT VISITOR SUMMARY

- 81.8% of Piedmont Region overnight visitors traveled for leisure purposes; 8.0% for business.
- Spring and summer were top seasons. May led at 11.5%, with April (9.1%) and March (9.0%) also strong.
- 53.7% of overnight visitors stayed in a hotel/motel; 40.0% stayed with friends or family; 7.9% used shared economy lodging.
- Top states of origin for Piedmont Region overnight visitors in 2025: NC, VA, SC, FL, NY, GA, CA, OH, PA, MD, NJ.

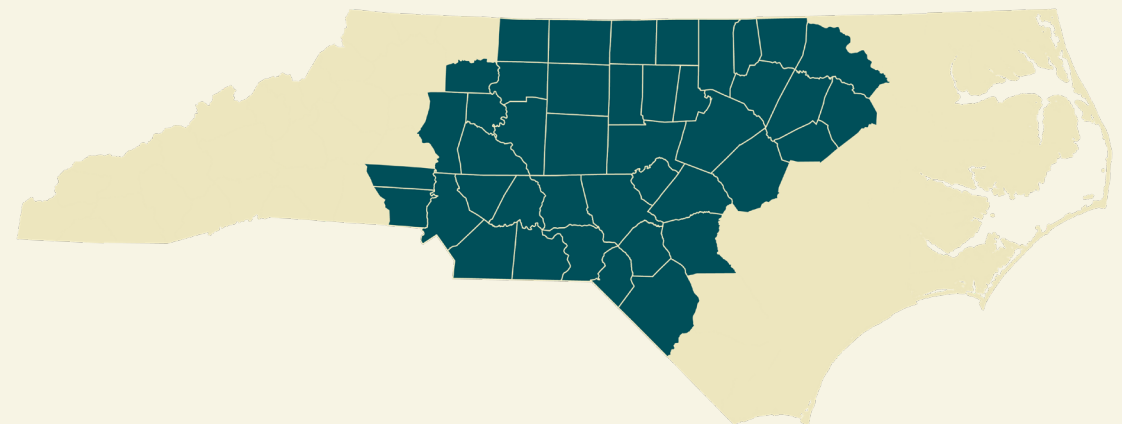
\$709
Avg Trip Spend

14.7%
First-Time Visitors

78.4%
Overnight Visitor Share

73.9%
Traveled by Personal Auto

VISIT NORTH CAROLINA PIEDMONT REGION



2025 COASTAL VISITOR SUMMARY

- 90.5% of Coastal Region visitors traveled for leisure purposes; 2.7% for business, 6.8% for other.
- Summer (June–Aug) was the peak season, with 35% of annual trips. December also saw strong visitation at 10%.
- 40.6% of overnight visitors stayed in a hotel/motel; 30.2% stayed with friends or family; 12.8% used shared economy lodging.
- Top states of origin for Coastal Region overnight visitors in 2025: NC, VA, NY, SC, PA, FL, OH, GA, MD, TN, NJ.

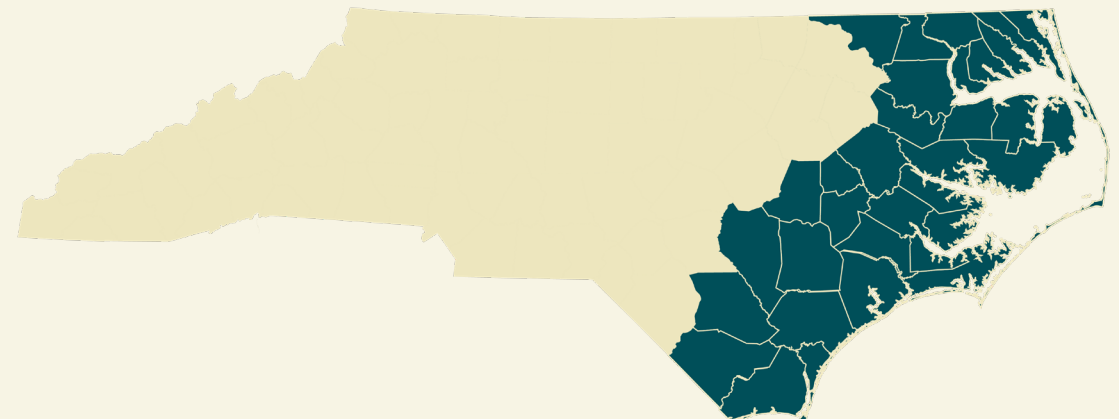
\$1,205
Avg Trip Spend

19.5%
First-Time Visitors

85.4%
Overnight Visitors

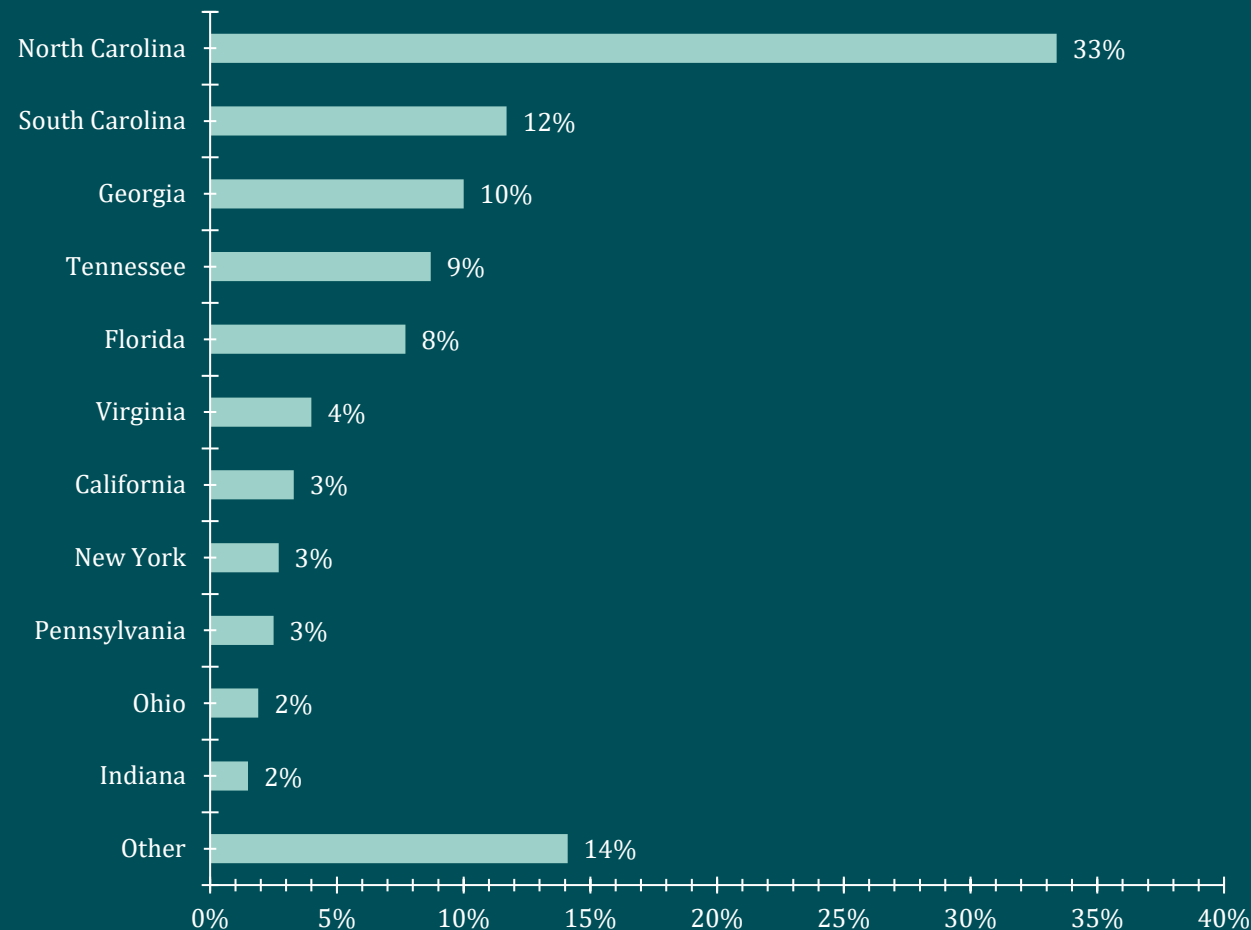
87.3%
Traveled by Personal Auto

VISIT NORTH CAROLINA COASTAL REGION



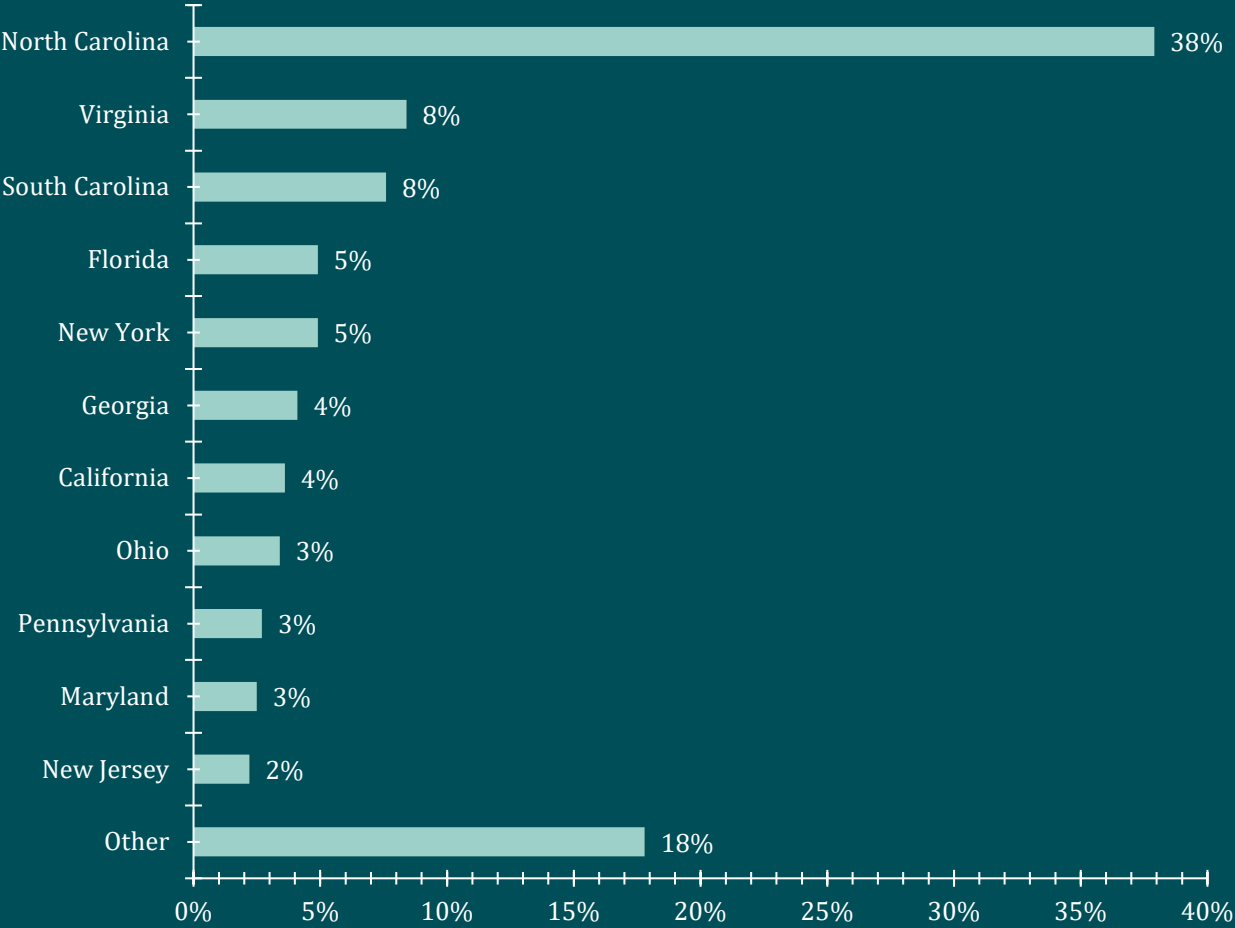
STATE OF ORIGIN — MOUNTAIN REGION

- 33% of visitors to the Mountain Region in 2025 were in-state residents.
- The next 10 states represent nearly 55% of visitors to the Mountain region.
- South Carolina and Georgia are the largest out-of-state markets.



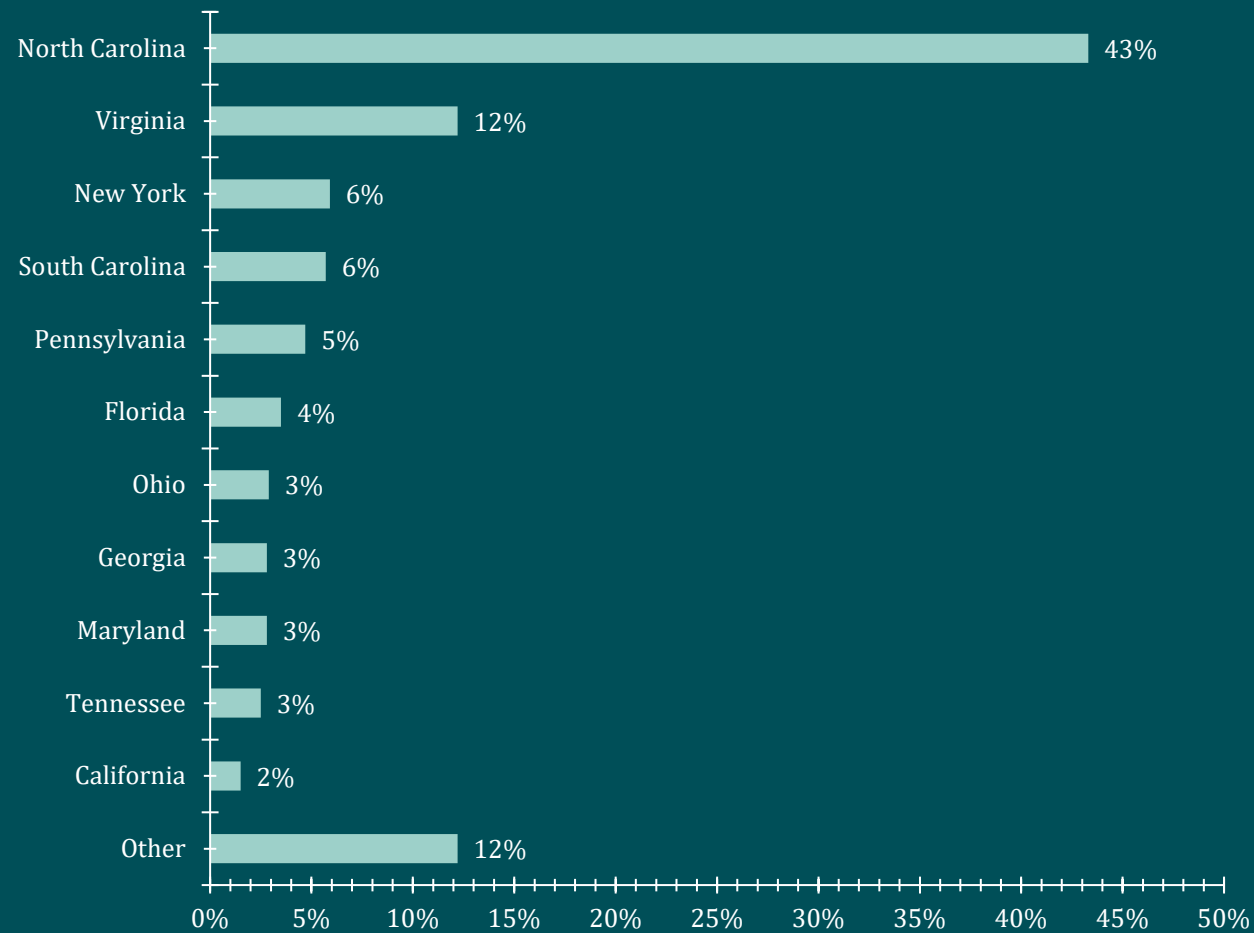
STATE OF ORIGIN — PIEDMONT REGION

- 38% of visitors to the Piedmont Region in 2025 were in-state residents.
- The next ten states represented 44% of visitors to the Piedmont Region.
- Virginia and South Carolina are the largest out-of-state markets.



STATE OF ORIGIN — COASTAL REGION

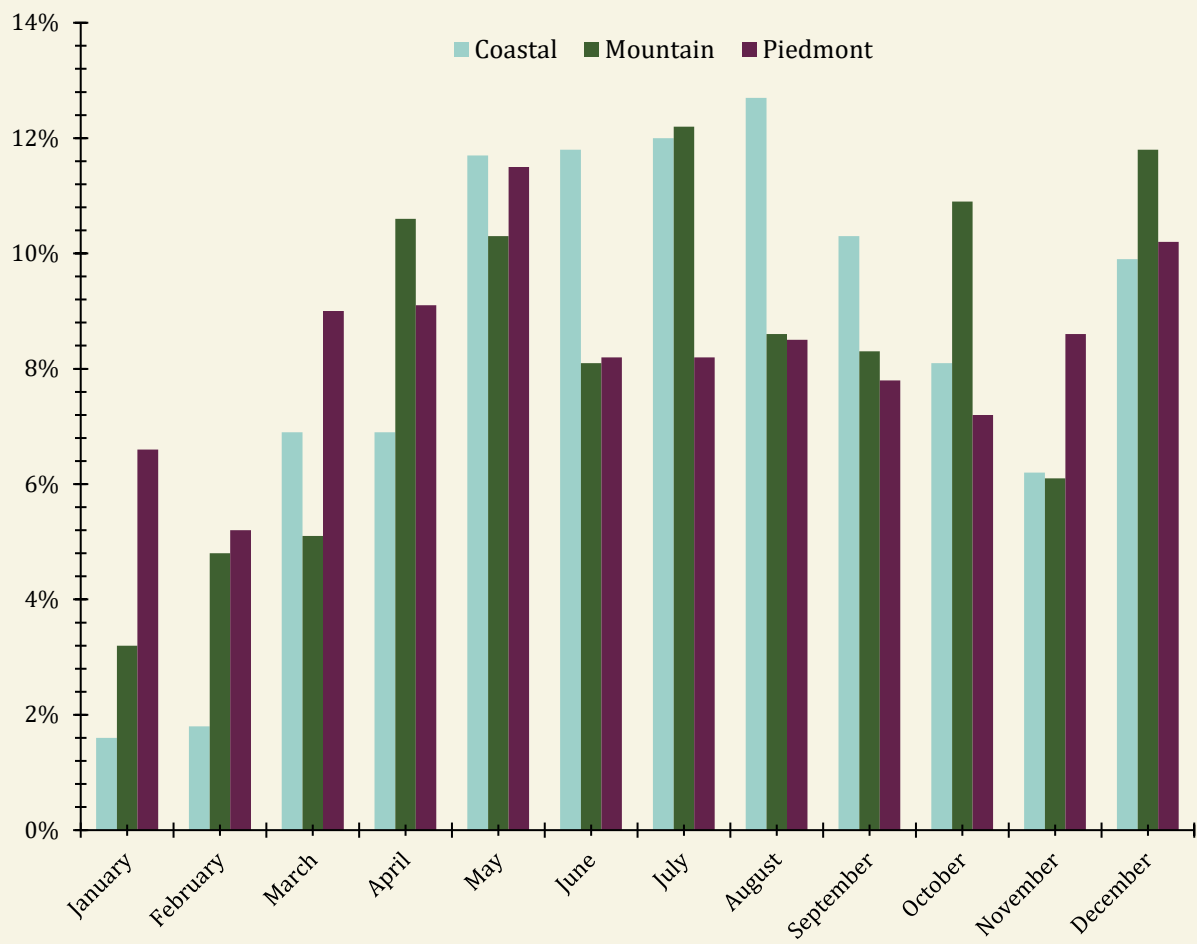
- 43% of visitors to the Coastal Region in 2025 were in-state residents.
- The next ten states represented 45% of overnight visitors to the Coastal Region.
- Virginia and New York are the largest out-of-state markets, reflecting the region’s strong draw from the Mid-Atlantic corridor.



SEASONALITY OF TRAVEL BY REGION

Summer peaks in the Coastal (June–Aug) and Mountain regions (July, Dec). The Piedmont sees more evenly distributed visitation with stronger spring and fall shoulder seasons.

**Percent of annual trips; does not represent monthly visitor counts*



AVERAGE TRIP SPENDING — OVERNIGHT VISITORS

Mountain Avg Overnight Trip Spend

\$1,036

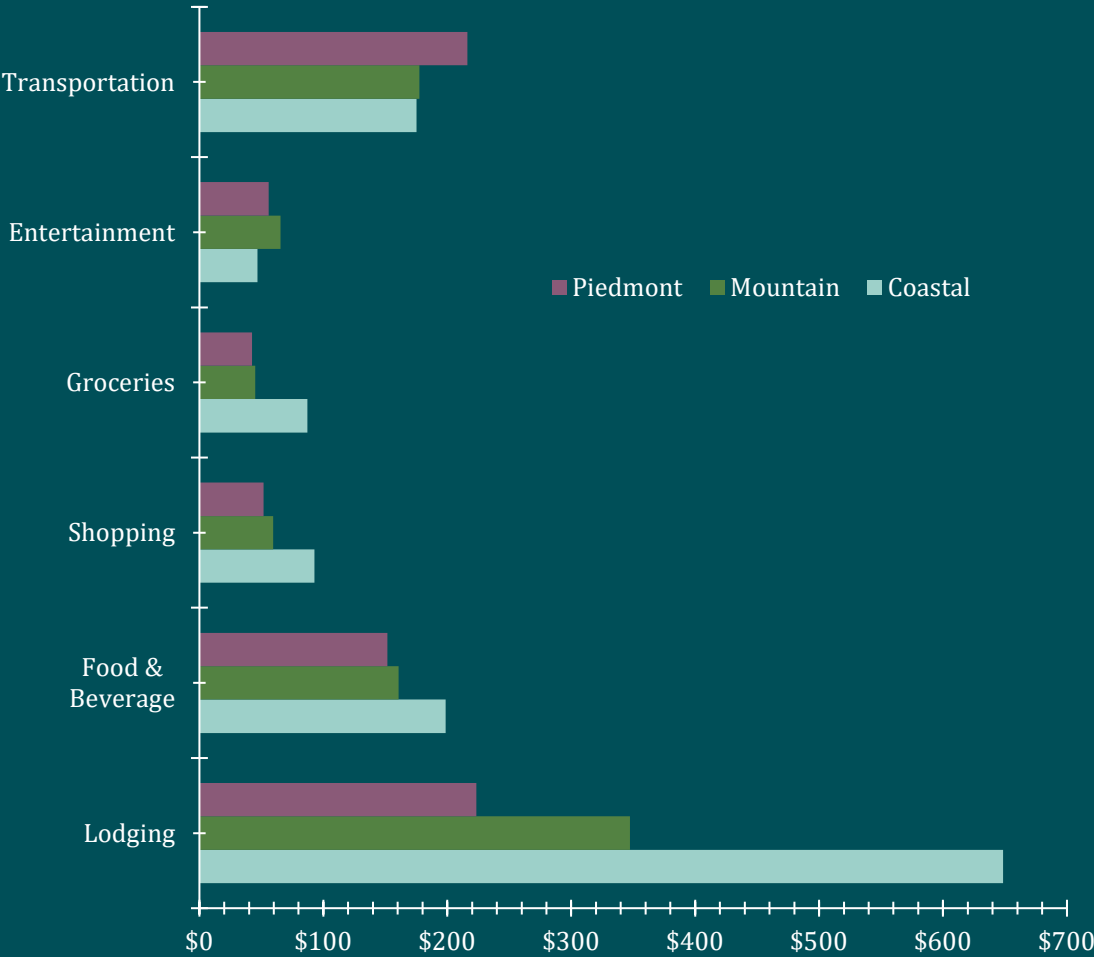
Piedmont Avg Overnight Trip Spend

\$851

Coastal Avg Overnight Trip Spend

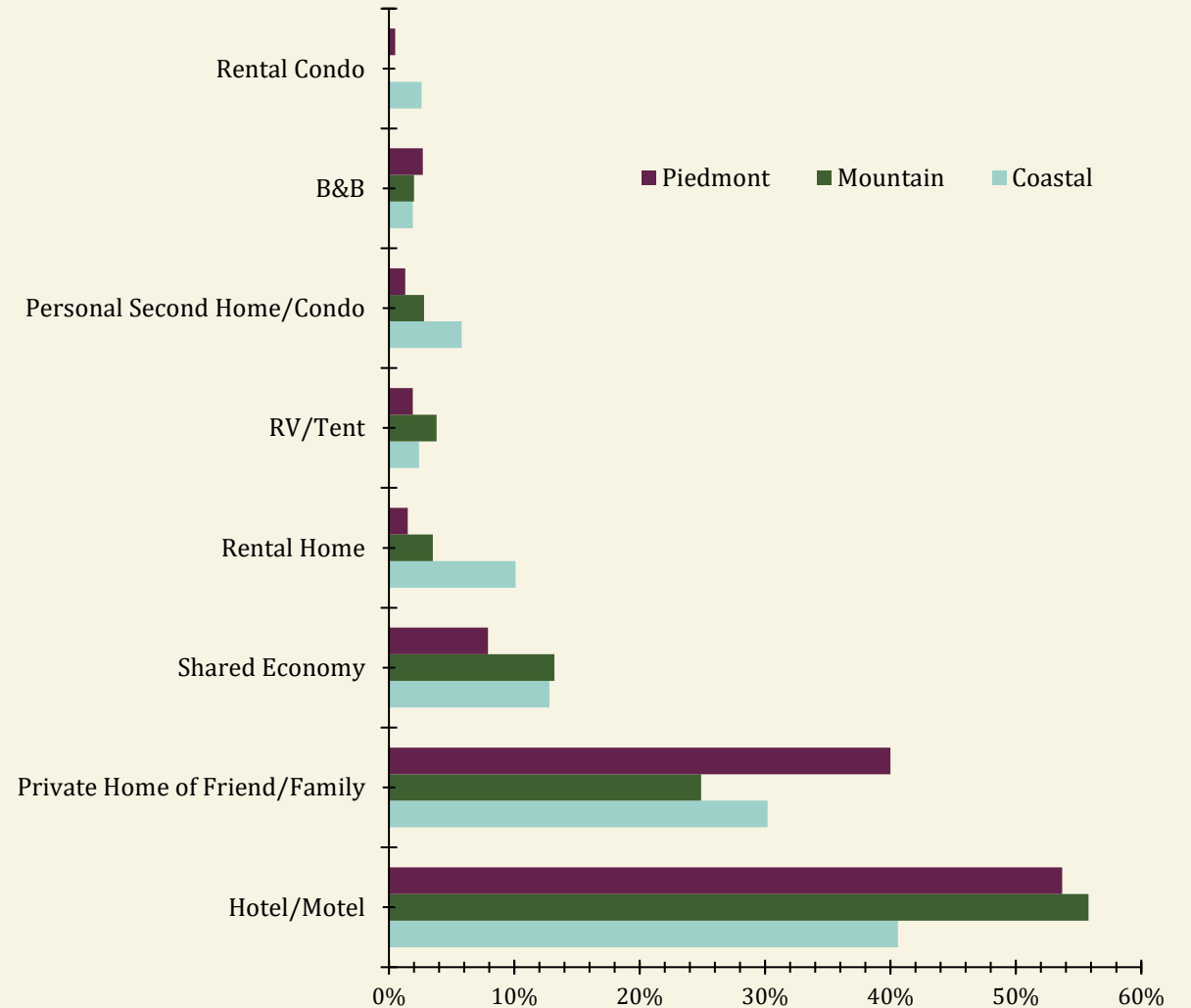
\$1,355

Coastal visitors spend significantly more on lodging due to longer stays. Mountain visitors lead in entertainment, reflecting outdoor and recreational activity spending.



ACCOMMODATIONS USED

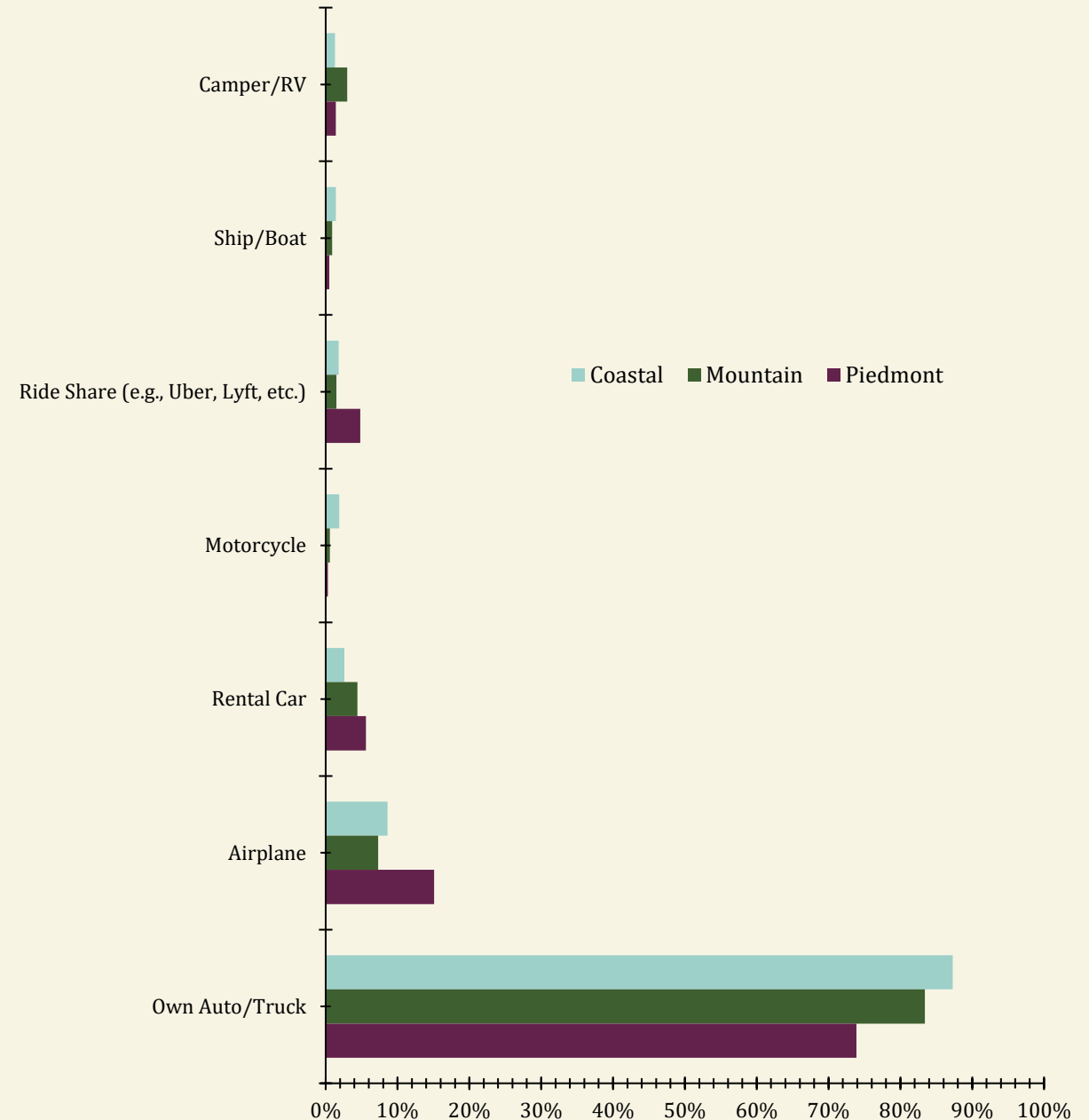
- Hotel/Motel is the top lodging choice across all three regions, but Coastal visitors are notably less reliant on it than Piedmont and Mountain visitors.
- Coastal visitors are more likely to stay in Vacation rentals or second homes.
- The Piedmont has the highest share of visitors staying with friends or family.



TRANSPORTATION TO DESTINATION

- Personal vehicles dominate across all regions, with Coastal visitors most likely to drive.
- Piedmont visitors are most likely to fly, use rental cars, or ride share, reflecting the region's urban centers and airport access.
- Coastal visitors are most likely to travel by motorcycle (2%) reflecting recreational touring.
- Mountain visitors lead in Camper/RV use (3%).

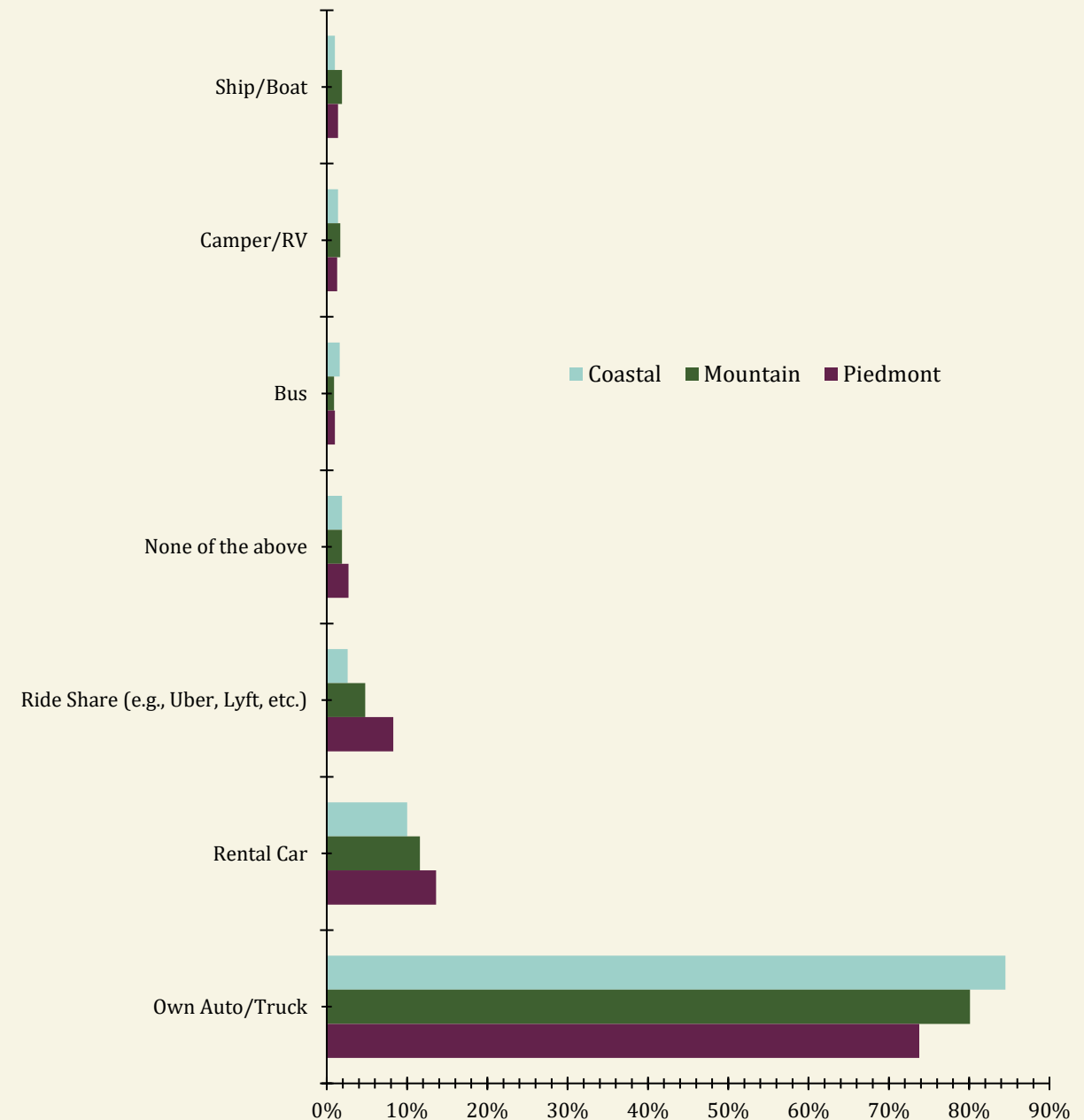
** Multiple responses allowed; percentages do not add to 100%*



TRANSPORTATION WITHIN DESTINATION

- Personal car remains the dominant transportation mode within all three regions.
- Coastal visitors rely most heavily on their own vehicles within the destination as well.
- Rental Car and Ride Share are more common among Piedmont visitors, reflecting more walkable/urban destination environments.

** Multiple responses allowed; percentages do not add to 100%*



TOP ACTIVITIES - MOUNTAINS

- Visiting friends/relatives leads at 31%, but historic sites, shopping and rural sightseeing all tie closely behind at 26%.
- Outdoor activities like hiking and wildlife viewing rank mid-list, suggesting nature is part of, but not defining a mountain trip.
- Local arts, craft breweries, and unique cuisine reflect a culturally curious visitor base.

**Note: Multiple responses allowed; percentages do not equal 100% and cannot be combined.*

Mountain Region	
Visiting friends/relatives	31%
Historic sites	26%
Shopping	26%
Rural sightseeing	26%
Hiking/Backpacking/Canyoneering	18%
Fine dining	17%
Wildlife viewing	16%
Museums	15%
Local/folk arts/crafts	14%
National park/Monuments/Recreation areas	14%
State park/Monuments/Recreation areas	13%
Unique local cuisine	11%
Gardens	11%
Art Galleries	11%
Other nature (photography, rockhound, etc)	11%
Casino/Gaming	9%
Craft breweries	8%
Beach	8%
Fishing	7%
Native American ruins/Rock art	7%

TOP ACTIVITIES - PIEDMONT

- Visiting friends/relatives dominates at 38%, nearly double the next activity (shopping at 20%), making social visits the clear primary purpose.
- Activities drop off quickly after the top two, with most falling between 5-13%.
- The spread of activities is notably urban – fine dining, museums, craft breweries and urban sightseeing all appear.

**Note: Multiple responses allowed; percentages do not equal 100% and cannot be combined.*

Piedmont Region	
Visiting friends/relatives	38%
Shopping	20%
Fine dining	13%
Museums	12%
Historic sites	10%
Beach	9%
Hiking/Backpacking/Canyoneering	9%
Unique local cuisine	9%
Local/folk arts/crafts	8%
Rural sightseeing	6%
State park/Monuments/Recreation areas	6%
Craft breweries	6%
Urban sightseeing	6%
Wildlife viewing	6%
Gardens	6%
Golf	6%
Fishing	5%
Family reunion	5%
Art Galleries	5%
Swimming	4%

TOP ACTIVITIES - COASTAL

- Beach is the most participated activity at 54%, the only activity across all three regions to clear 50%.
- Visiting friends/relatives still ranks second at 40%, showing social travel is significant even in a strong destination region.
- Water and nature activities – swimming, fishing, wildlife viewing – feature prominently in a way they don't in other regions.

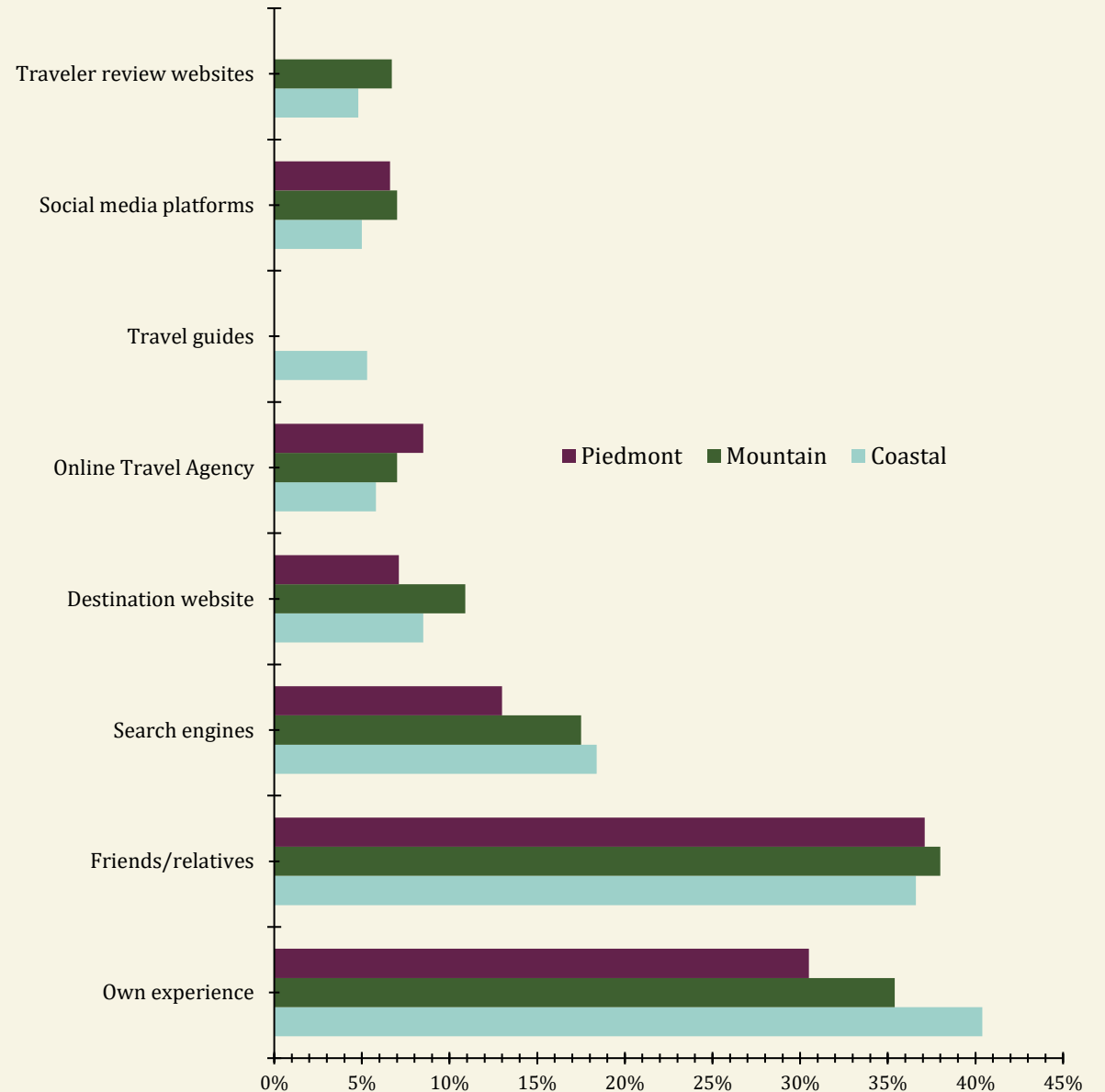
**Note: Multiple responses allowed; percentages do not equal 100% and cannot be combined.*

Coastal Region	
Beach	54%
Visiting friends/relatives	40%
Shopping	25%
Historic sites	20%
Swimming	15%
Fine dining	15%
Unique local cuisine	13%
Fishing	12%
Wildlife viewing	12%
State park/Monuments/Recreation areas	11%
Rural sightseeing	11%
Museums	10%
Hiking/Backpacking/Canyoneering	8%
National park/Monuments/Recreation areas	8%
Golf	7%
Local/folk arts/crafts	7%
Zoos/Aquariums/Aviaries	7%
Gardens	6%
Urban sightseeing	6%
Bird Watching	5%

TRIP PLANNING SOURCES BY REGION

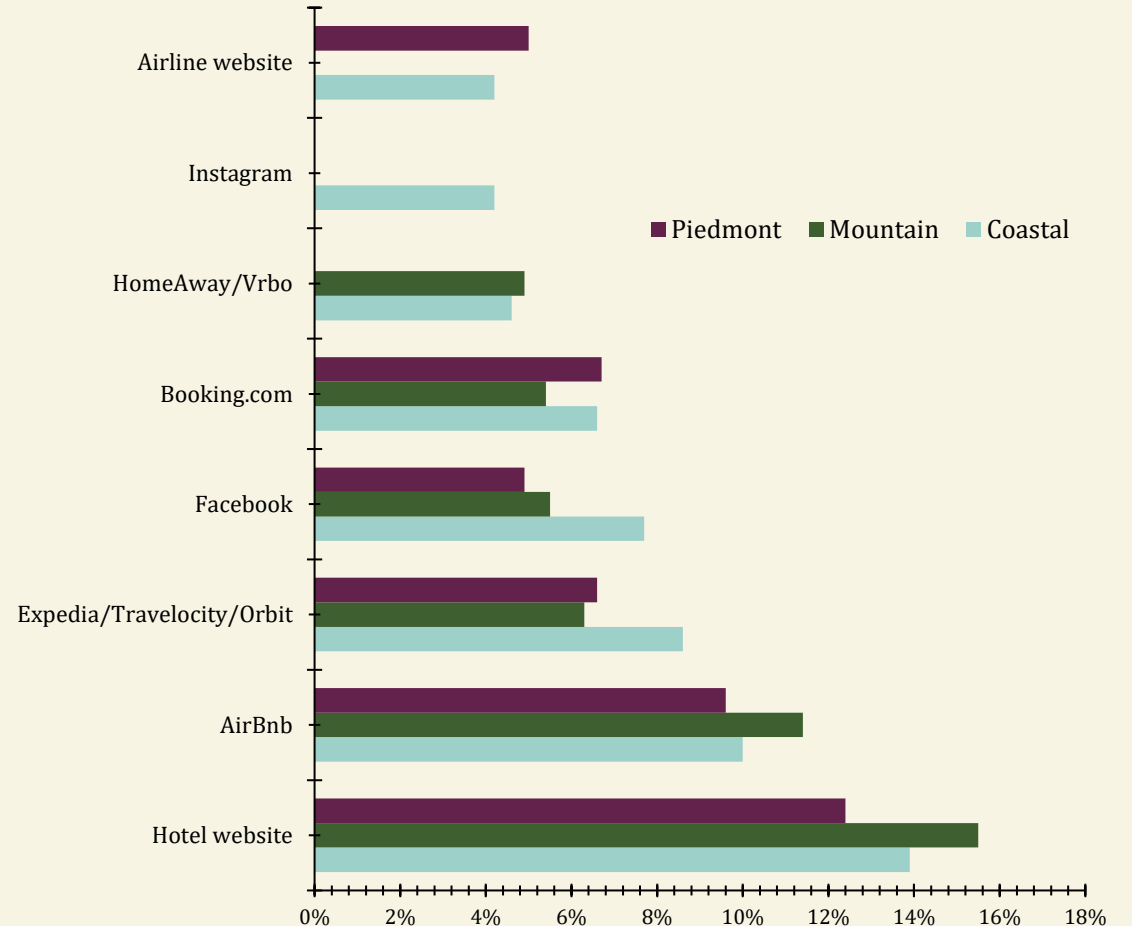
Friends/relatives and own experience are the top planning sources across all regions. Mountain visitors lead in destination website use.

- Coastal
 - Own Experience
 - Friends/relatives
 - Search Engines
- Piedmont
 - Friends/relatives
 - Own Experience
 - Search Engines
- Mountains
 - Friends/relatives
 - Own Experience
 - Search Engines



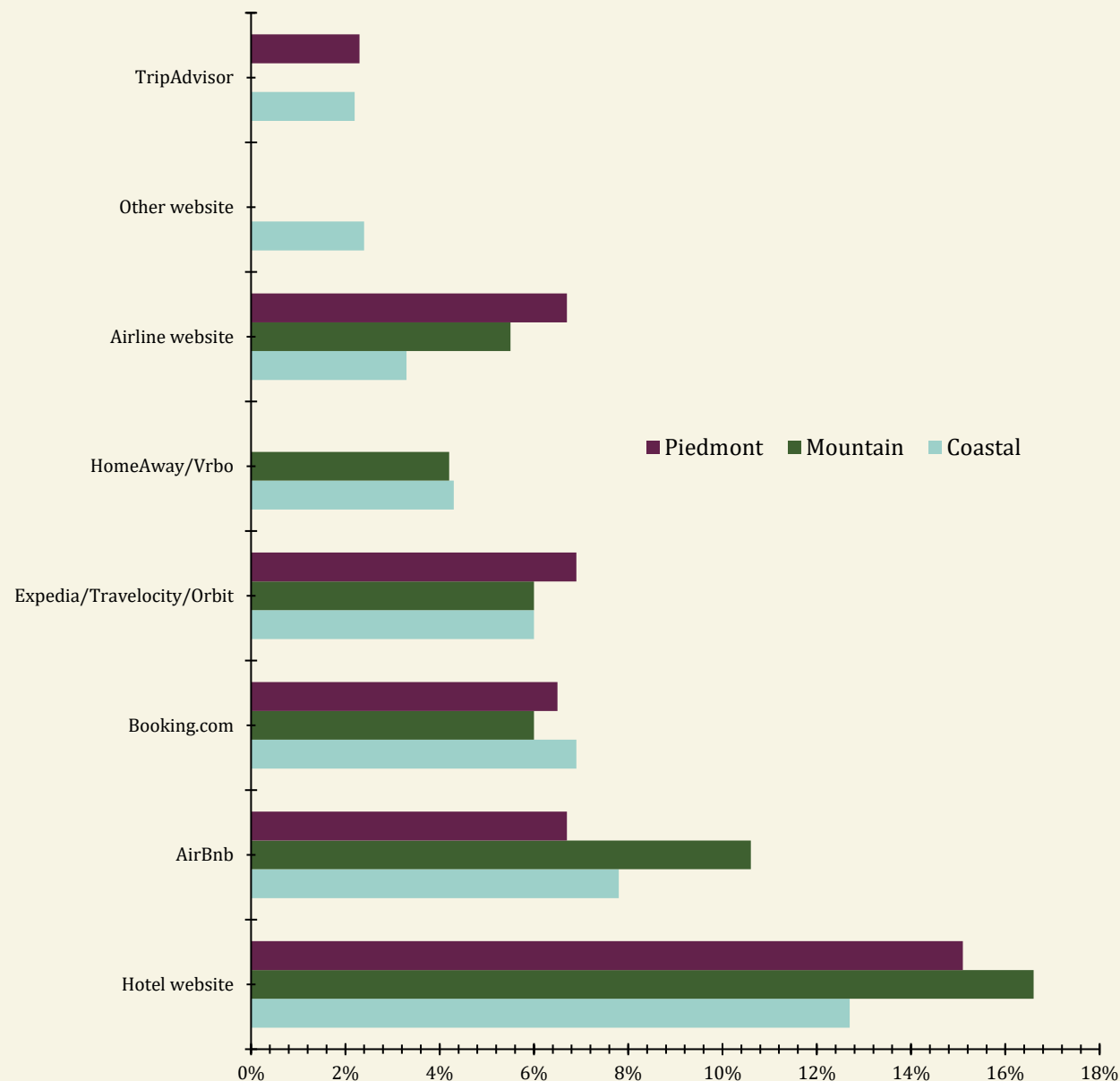
RESEARCH SOURCES BY REGION

- Hotel websites and AirBnb lead research activity.
- Mountain visitors show higher use of hotel websites and TripAdvisor.
- Coastal visitors are more likely to use AirBnb and HomeAway/Vrbo for research, reflecting the short-term rental market.
- Piedmont visitors lead in hotel website use and Expedia/Orbitz, aligning with more urban and business-oriented travel.

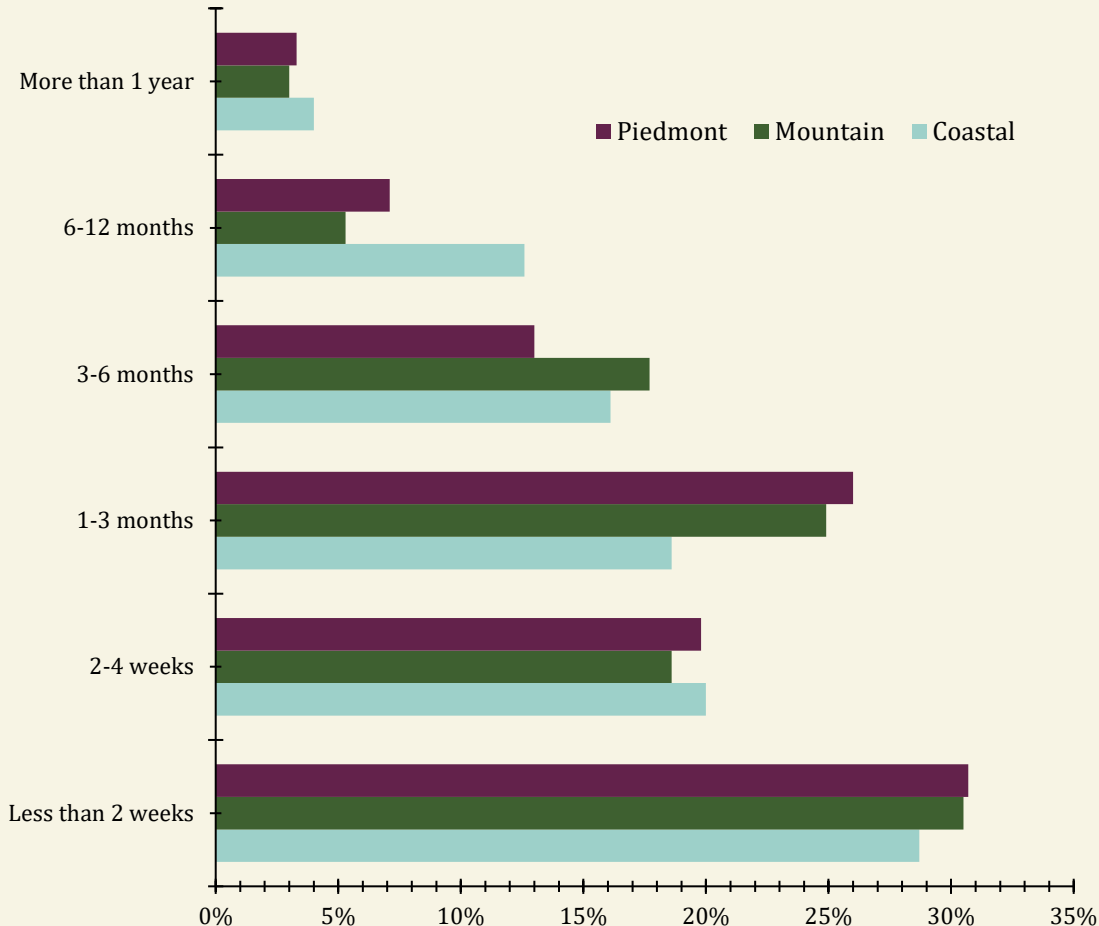


BOOKING BEHAVIOR BY REGION

- Hotel websites lead booking across all regions.
- AirBnb is the second most common booking source for Coastal and Mountain visitors, while OTAs like Expedia are more common among Piedmont visitors.



ADVANCE DECISION TIMING BY REGION

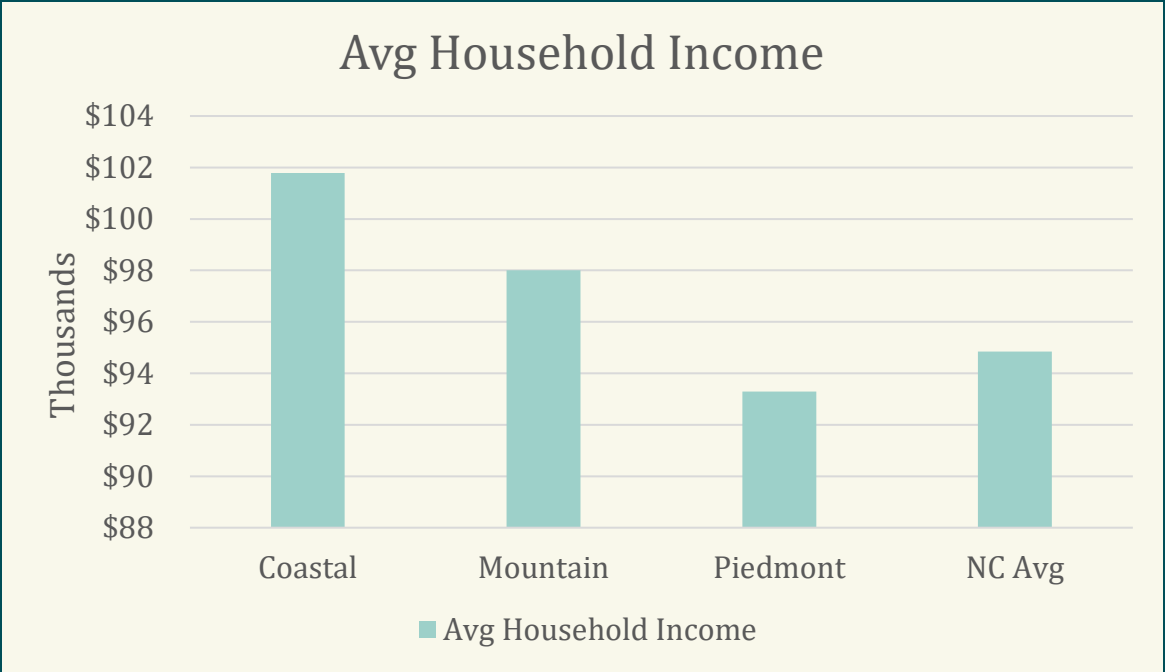
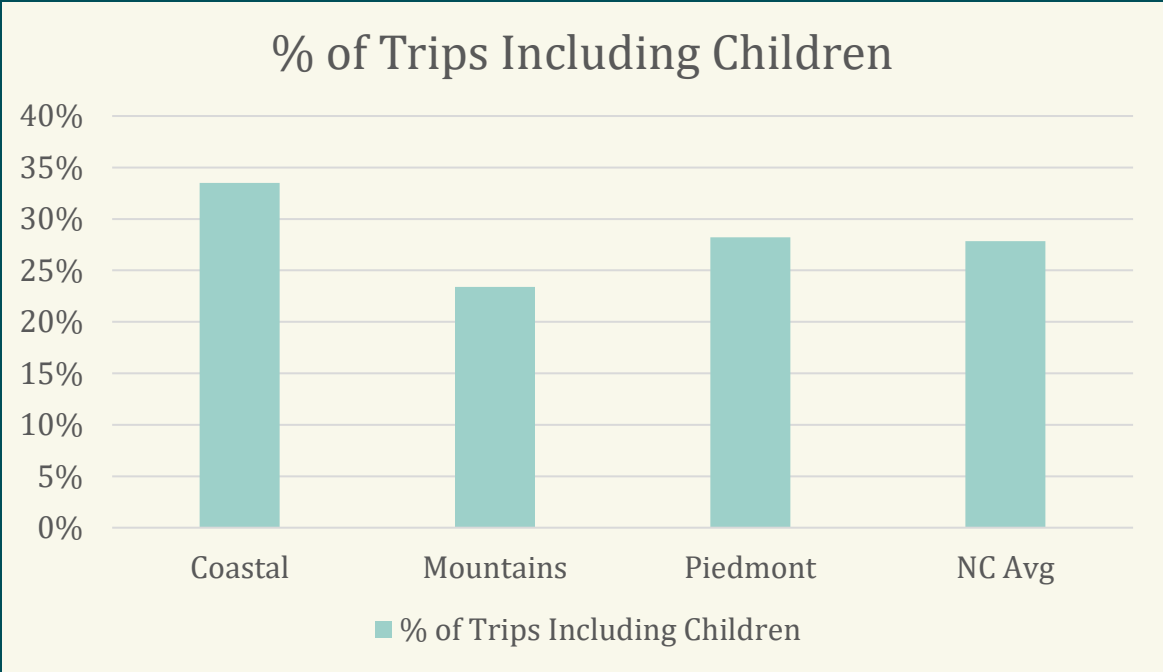


Most visitors across all regions decide within four weeks.

- Coastal visitors plan furthest in advance, with 16% deciding 3–6 months out and 13% more than 6 months out.
- Mountain visitors are most spontaneous: 31% decide less than 2 weeks before visiting.
- Piedmont visitors show the highest share of 1–3-month planners (26%), reflecting more structured trip planning.

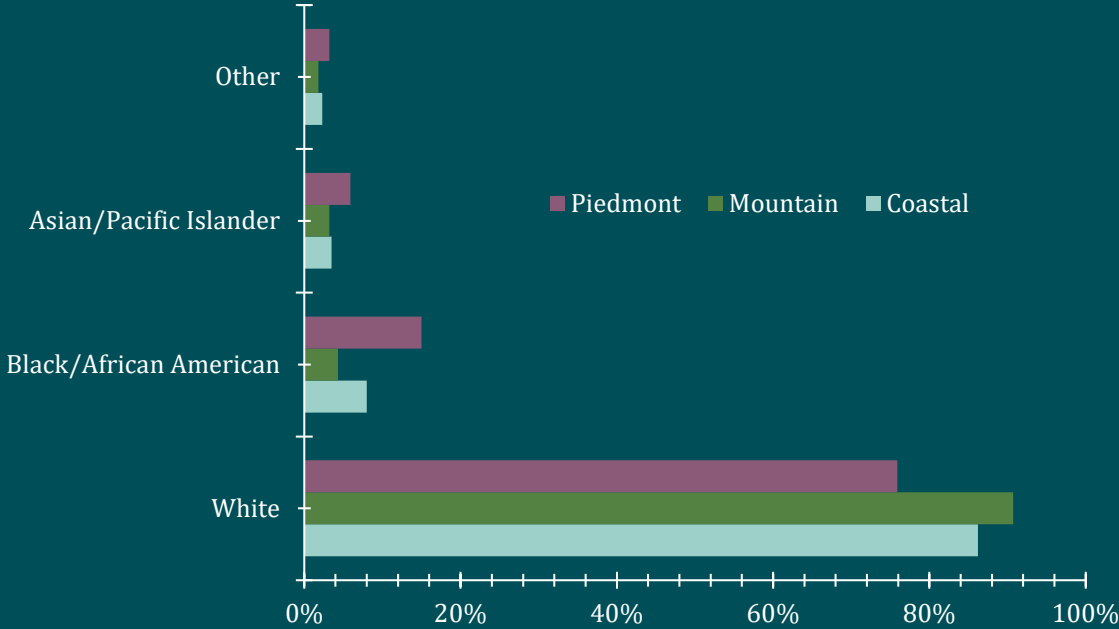
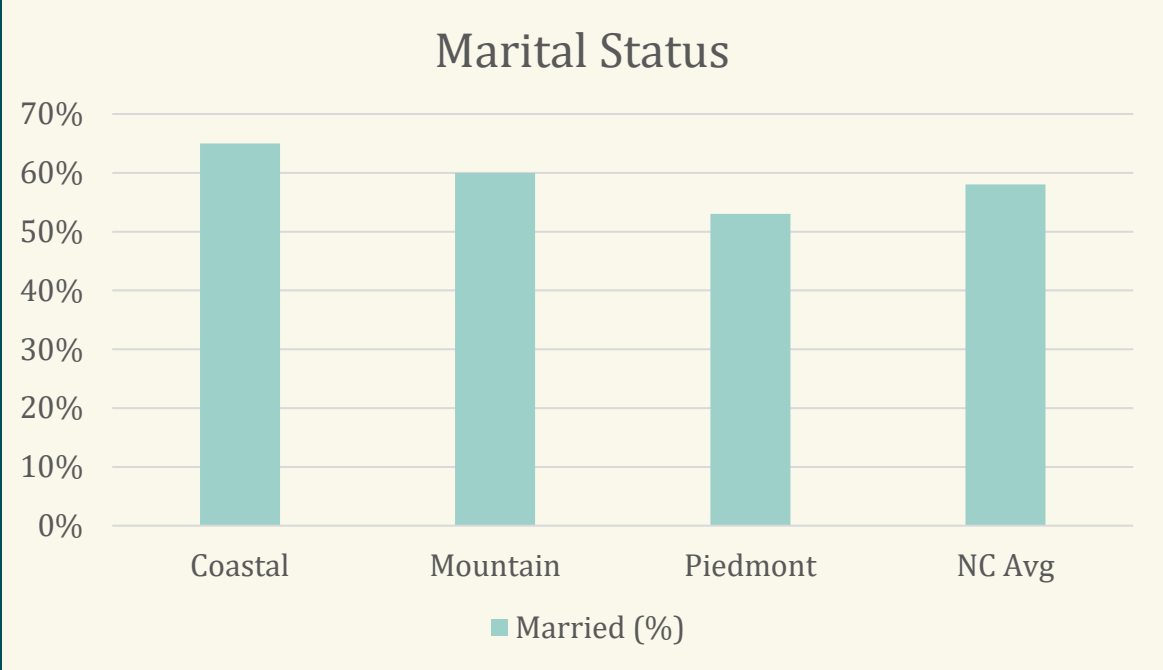
TRAVEL PARTY CHARACTERISTICS BY REGION

Average Party Size			
2.6	2.5	2.4	2.4
Coastal Region	Mountain Region	Piedmont Region	NC Average



VISITOR DEMOGRAPHICS BY REGION

Average Age			
Coastal	Mountain	Piedmont	NC Avg
49 years	50 years	47 years	49 years



VISITOR SATISFACTION BY REGION

Percent of visitors rating their experience 6 or higher on a 10-point scale

93%

Coastal Region

97%

Mountain Region

96%

Piedmont Region

96%

NC Statewide

All three regions report high satisfaction. Mountain visitors show the highest share of “10 - Extremely Satisfied” ratings (52%).

**Note that responses to this question ranked a satisfaction on a scale of 1-10. Totals are calculated from those ranking 6 or higher in satisfaction.*

GLOSSARY OF TERMS & METHODOLOGY

Travel - A trip over 50 miles one-way from home *or* any night away from home

Overnight Visitor - A visitor who spent at least one night away from home during travel

Daytripper - A visitor who did not spend any nights away from home, but traveled at least 50 miles one-way from home

Designated Market Area – Also referred to as a DMA and is a term used by Nielsen Media Research to identify an exclusive geographic area of counties in which the home market television stations hold a dominance of total hours viewed. There are 210 DMAs in the USA.

- Data reflects survey-based visitor research capturing trip behavior, characteristics and attitudes.
- Most charts are presented as percent distributions, shares, or averages, not absolute counts.
- Statewide visitor volume is provided for high-level context only; additional metrics are designed for comparative and planning use.
- Many questions allow multiple responses, meaning percentages may exceed 100%.
- Results reflect reported behavior and perceptions at the time of survey.
- Data is intended to support marketing strategy, destination planning, and partner benchmarking, not demand forecasting or market sizing at local levels.