2025 NORTH CAROLINA VISITOR PROFILE

Who’s Visiting, How They Travel and What It Means for Your Destination

Visit North Carolina NC®

2025 VISITOR SNAPSHOT

35M Visitors
Statewide Visitation (2025)

#7 National Rank
Among U.S. States

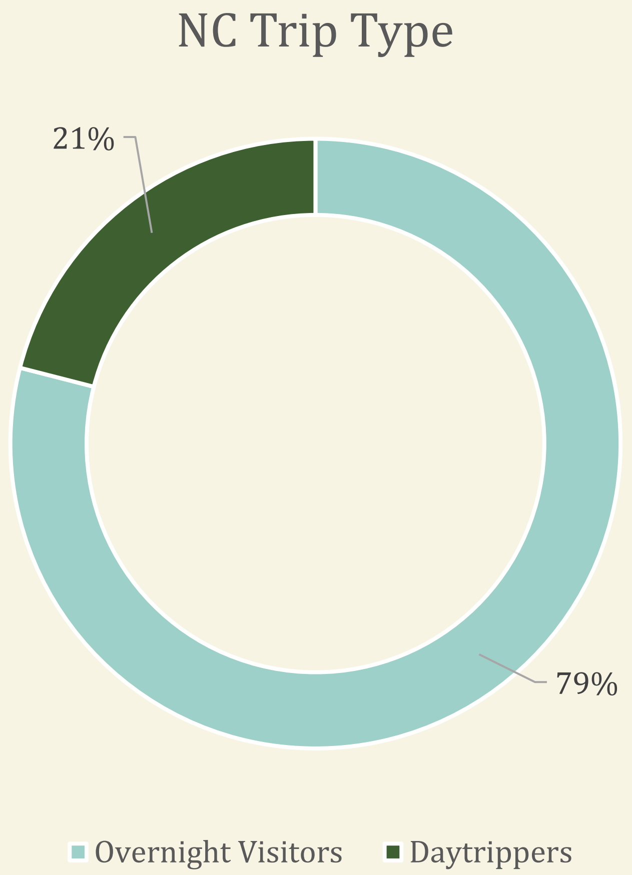
79% Overnight Trips
Share of All Visits

$867 Avg Trip Spend
Per Visitor

- North Carolina remains a top-tier travel destination
- Growth is driven by repeat and regional travel
- Leisure travel continues to drive the majority of visitation
- Overnight visitors remain the higher-value trip type

VISITOR MIX: OVERNIGHT vs DAY TRIPS

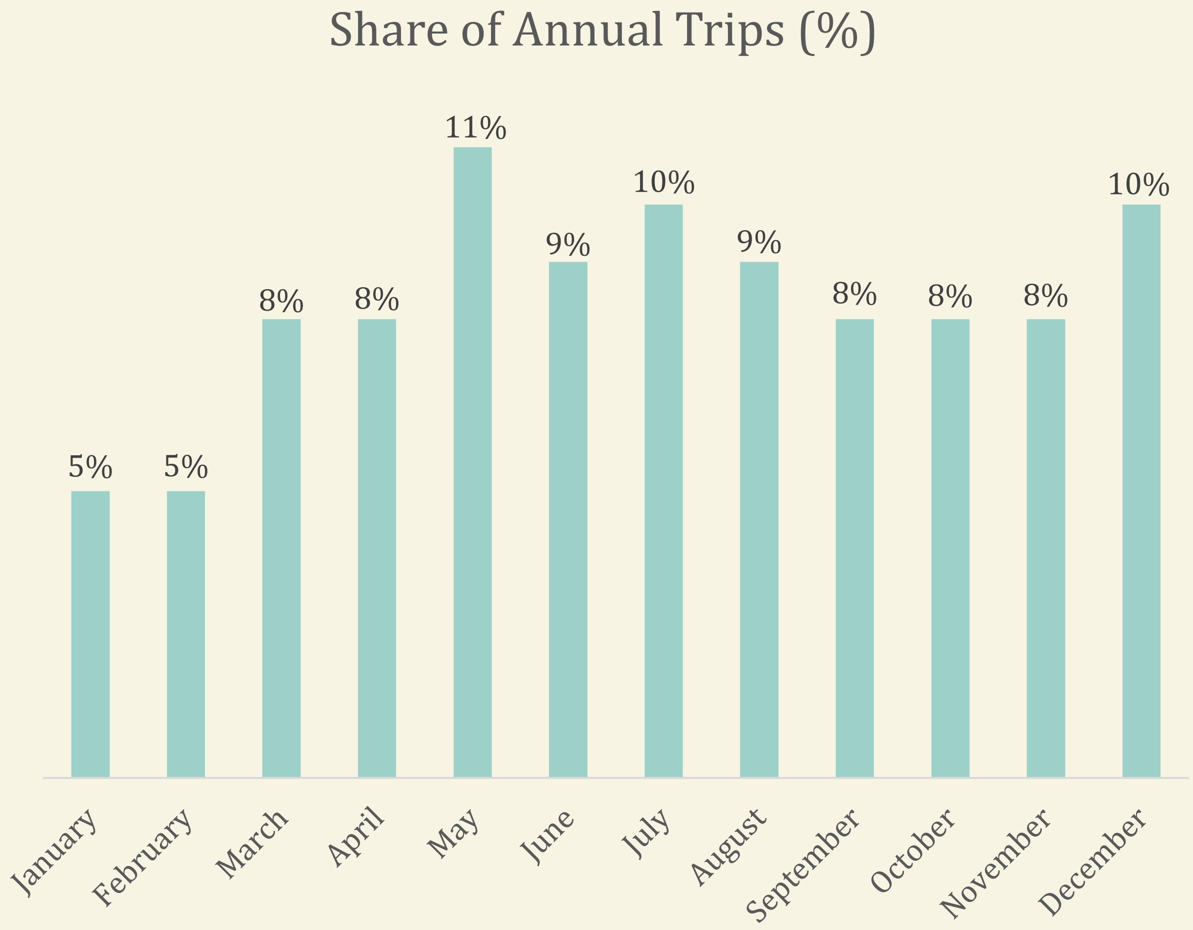
Overnight visitation drives the majority of economic impact.



SEASONALITY OF TRAVEL

Summer represents the highest share of annual trips, while Spring and Fall offer key windows for strategic marketing and visitation growth.

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



AVERAGE VISITOR SPENDING (ALL TRIPS)

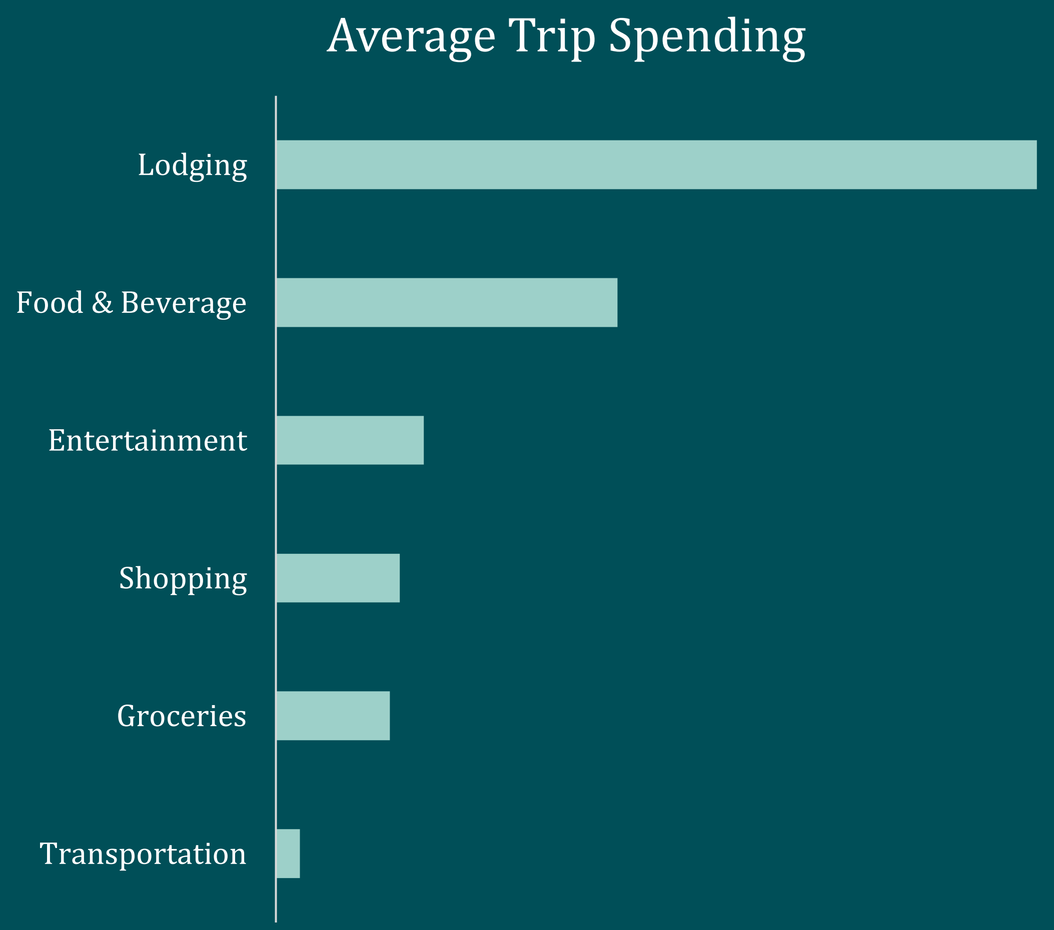
Average Spend per Trip

$867

Average Daily Spend

$255

Spending patterns can highlight the interconnected role of lodging, dining and experiences in the visitor economy.



AVERAGE SPENDNG – OVERNIGHT TRIPS

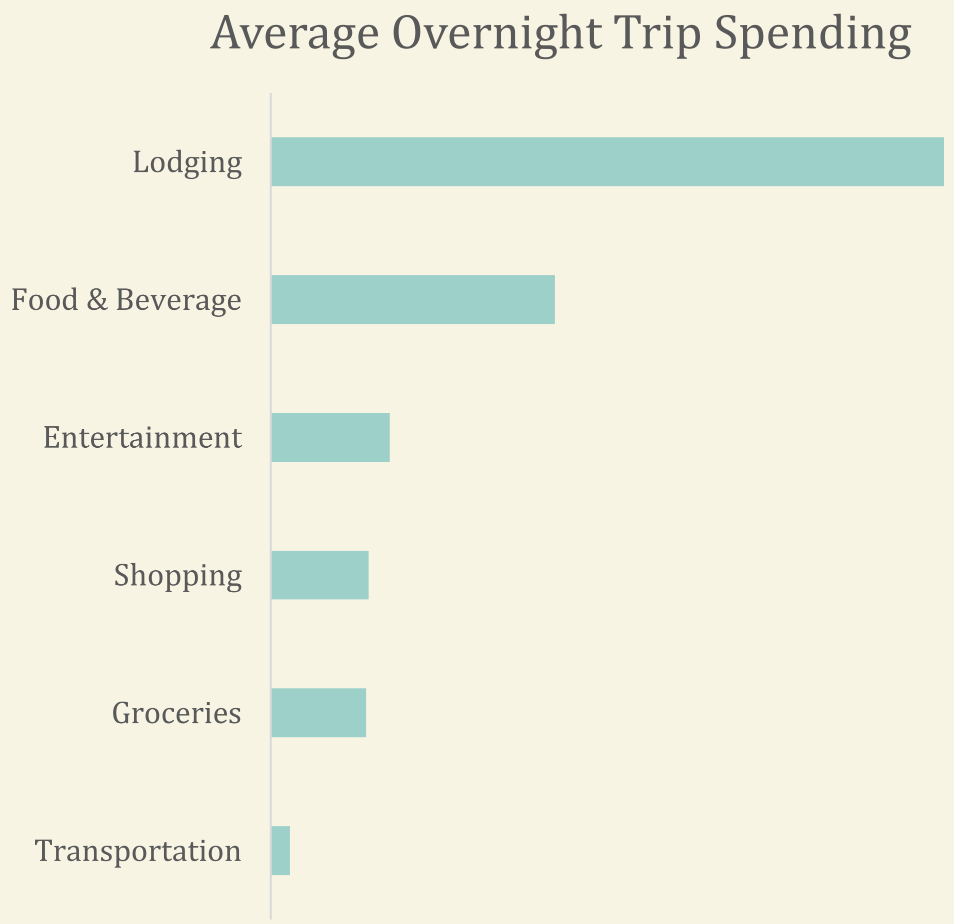
Average Spend per Overnight Trip

$1,049

Average Daily Spend for Overnight Trips

$308

Overnight visitors typically contribute higher per-trip spending, driven primarily by lodging and extended in-destination activity.



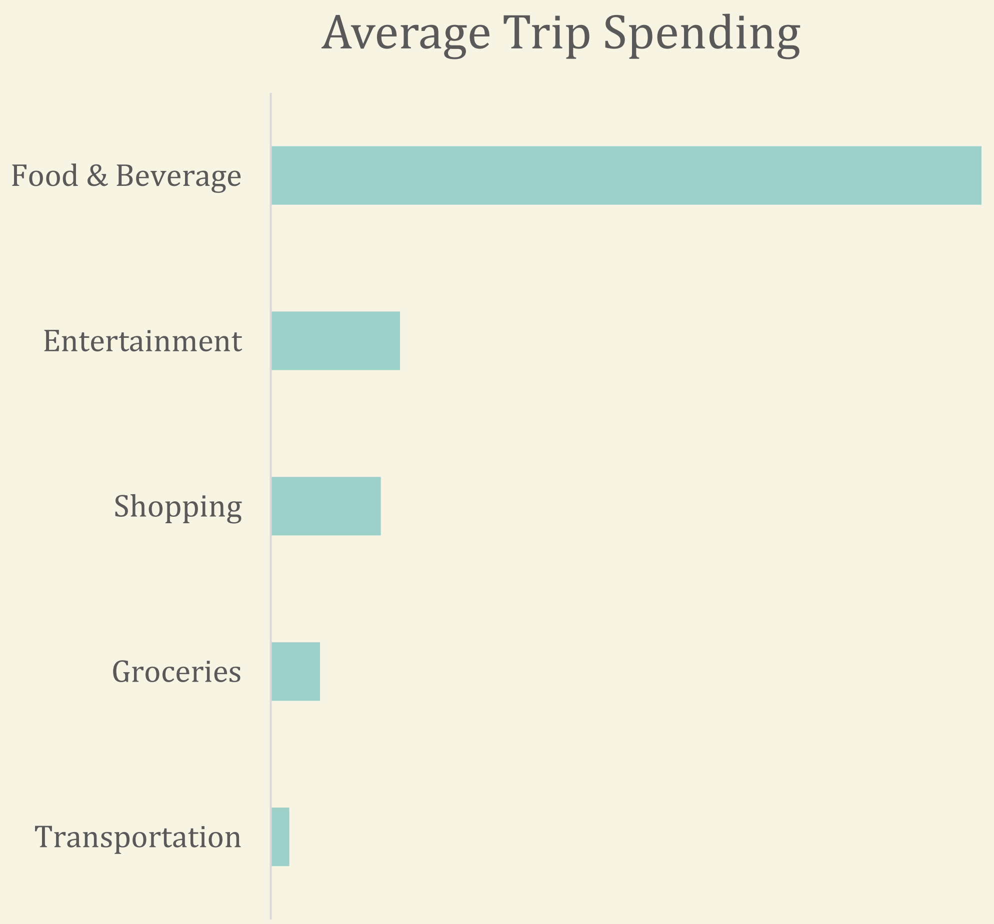
AVERAGE SPENDING – DAY TRIPS

Average Spend per Day Trip

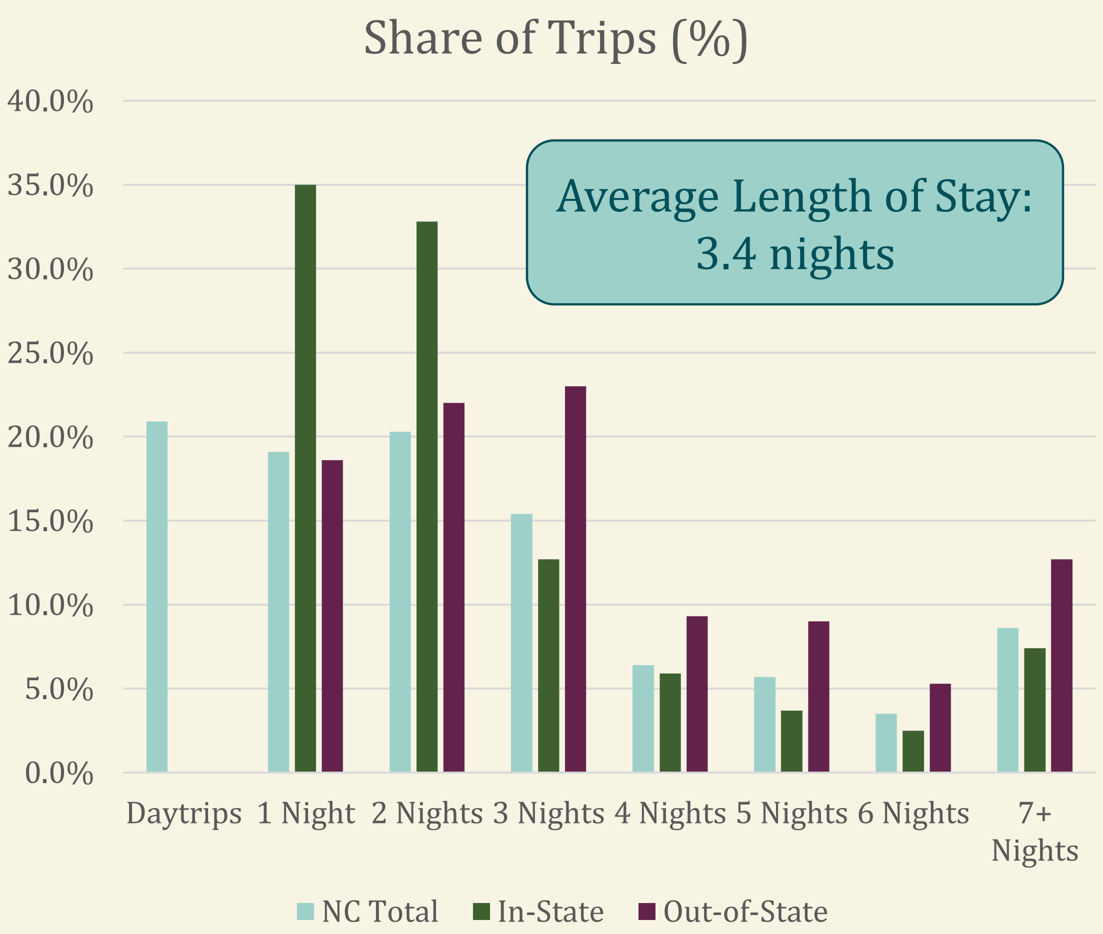
$182

Reported spend per visitor trip

Day trips support local businesses through shorter, more frequent visits focused on activities and dining.



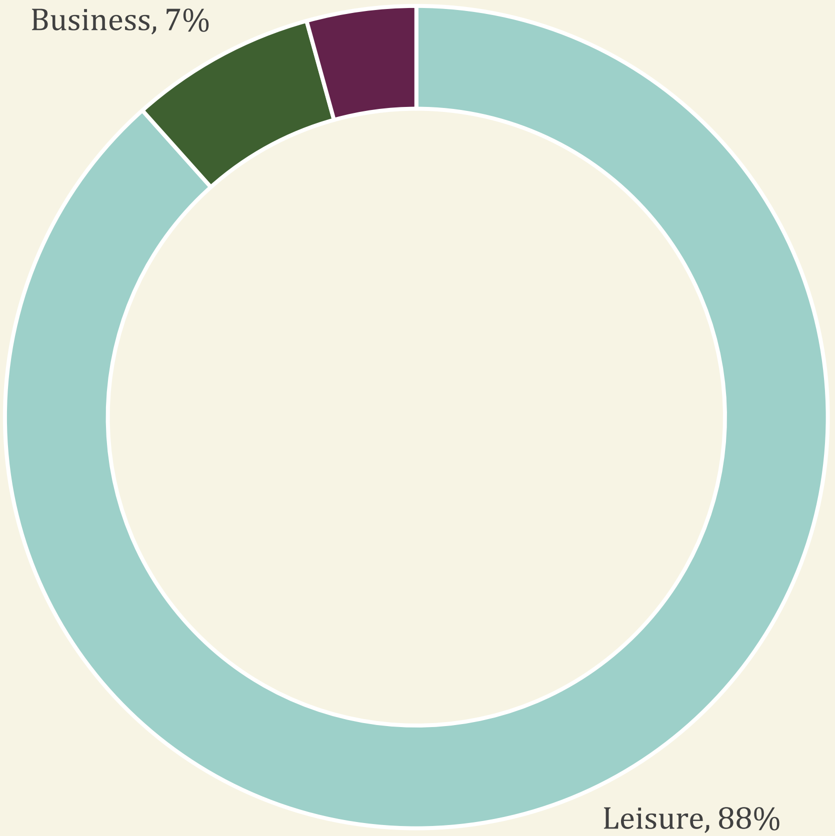
LENGTH OF STAY



Length of stay varies by origin, with in-state visitors more likely to take short trips and out-of-state visitors more likely to stay three or more nights.

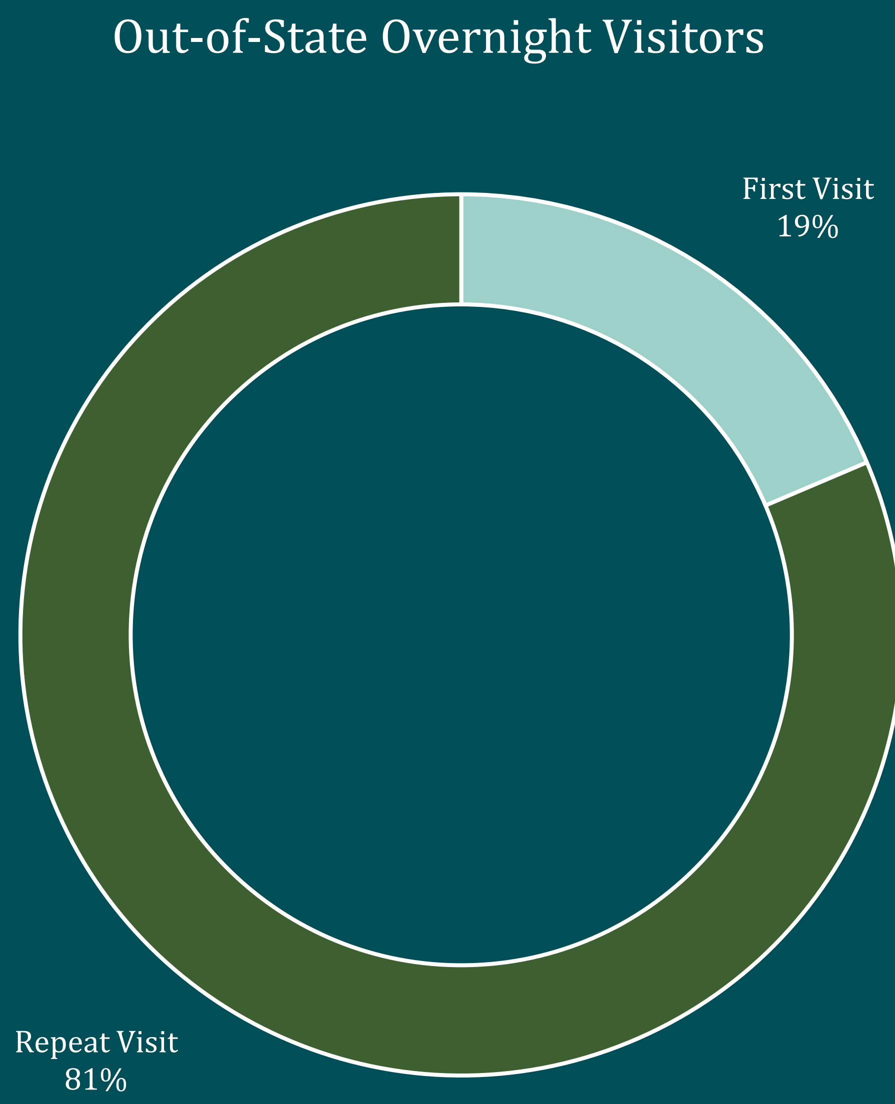
- Two-night stays are the most common trip length overall, driven largely by in-state travel
- Out-of-state visitors account for a larger share of trips lasting three nights or more

PURPOSE OF TRIP



FIRST-TIME vs REPEAT VISITORS

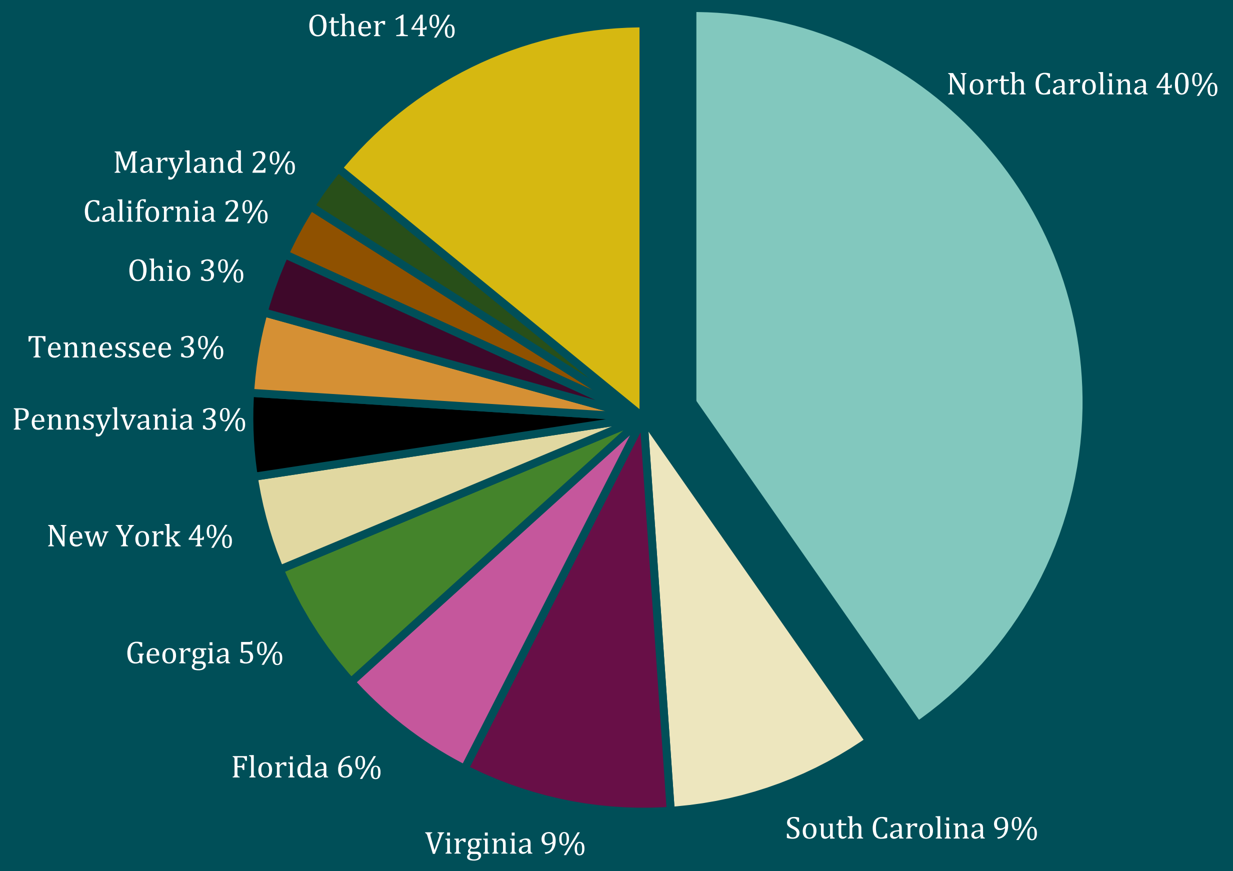
Most overnight trips to North Carolina come from repeat visitors, reflecting strong familiarity and loyalty to the state.



ORIGIN STATES

Regional drive markets dominate North Carolina visitation, with NC residents and neighboring states accounting for the largest share of trips.

- The visitor market is geographically concentrated, with most trips originating from the Southeast and Mid-Atlantic.
- Smaller but diverse contributions from more distant states indicate broader national awareness with strong regional reliance.



ORIGIN MARKETS (DMAs)

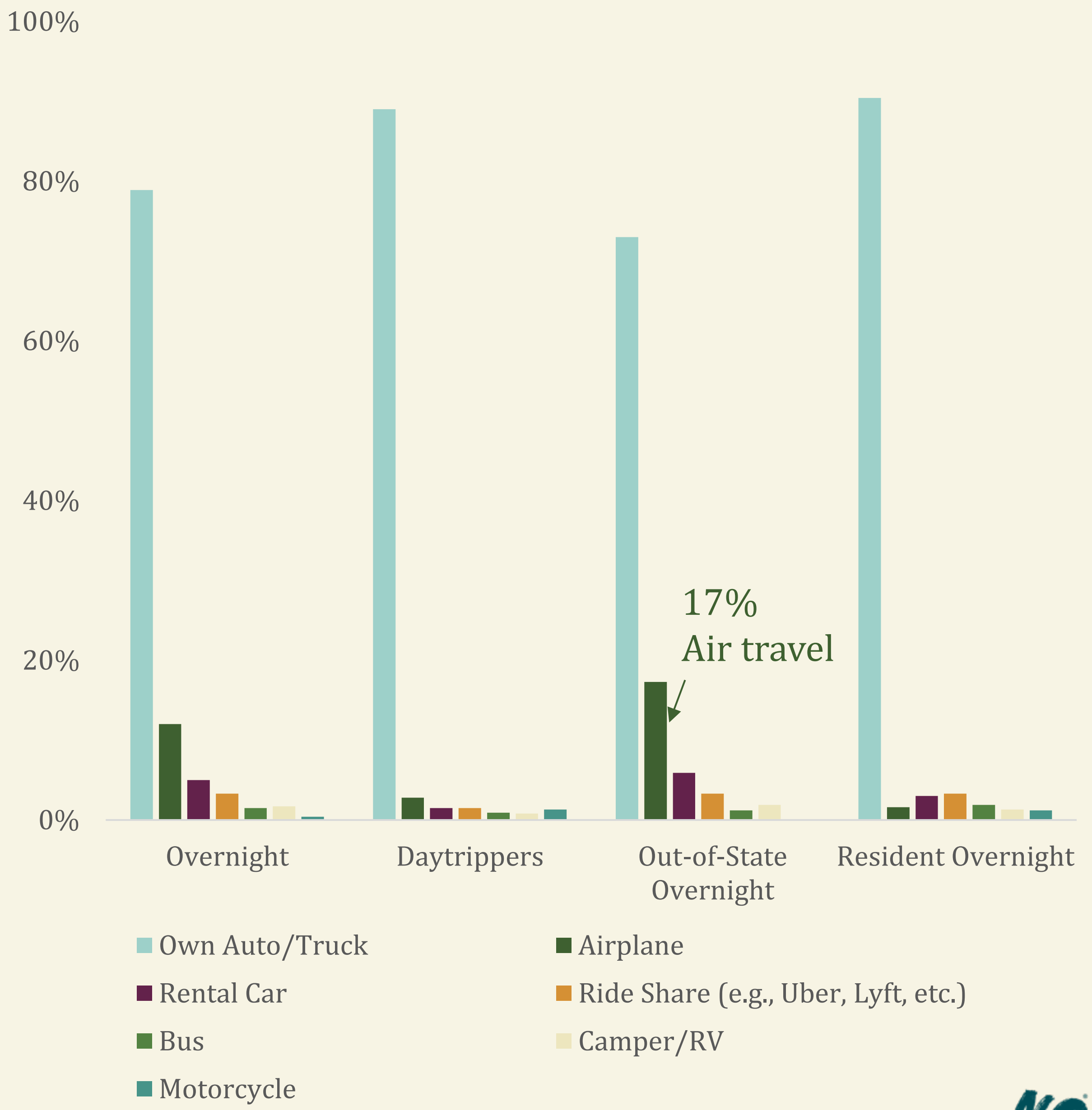
In-state and nearby media markets account for the largest share of trips to North Carolina, highlighting the continued importance of regional reach.

- The leading DMAs are primarily in-state or adjacent, reinforcing the role of proximity and drive access in travel decisions.
- Smaller but consistent shares from major metros such as Atlanta, New York and Washington, DC indicate broader awareness beyond the region.

TRANSPORTATION USED TO TRAVEL TO NORTH CAROLINA

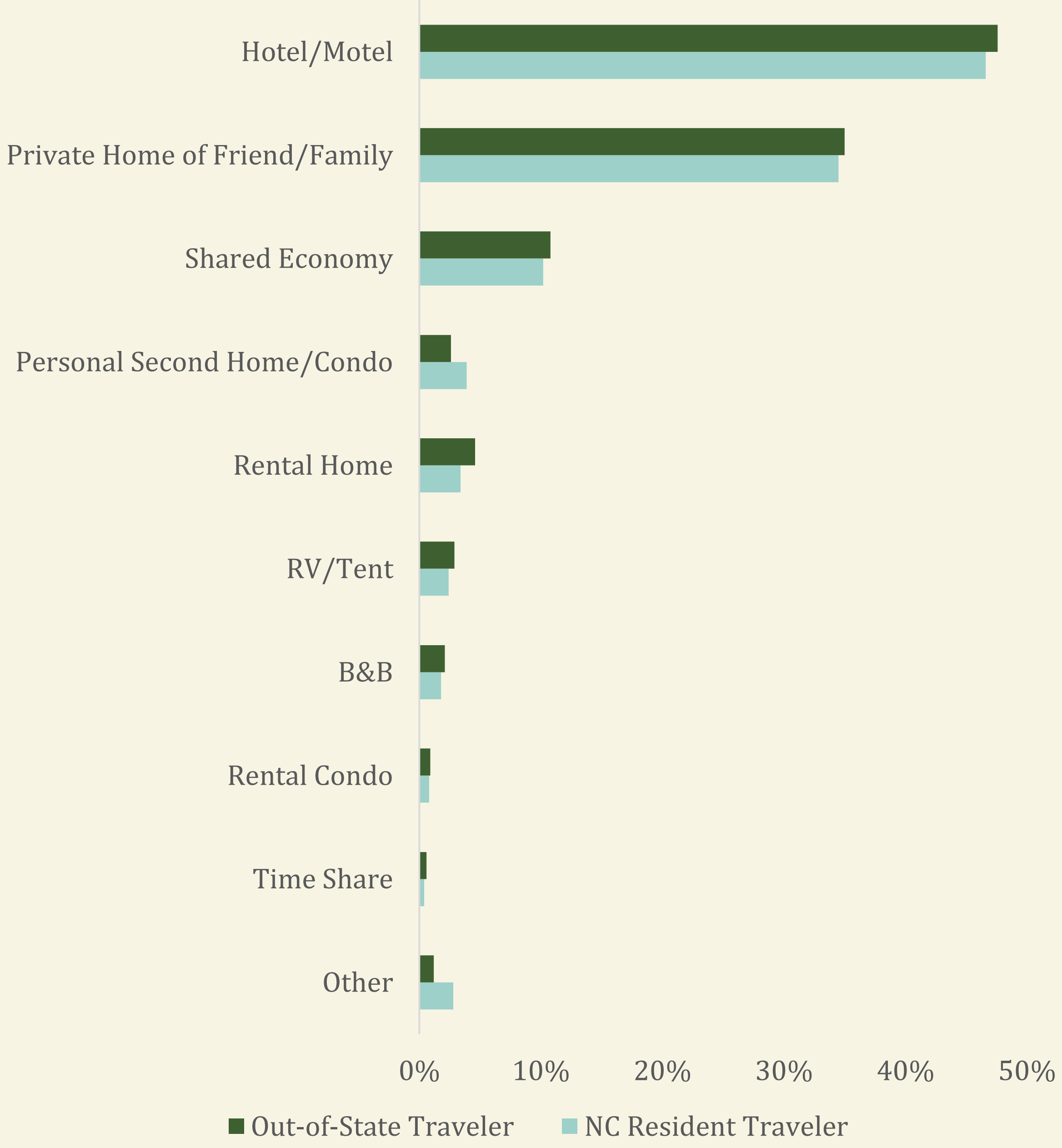
- Unsurprisingly, most North Carolina visitors traveled to and within the state via automobile, either personal or rented.

- 17% of out-of-state overnight travelers flew to the state in 2025, down from 20% in 2024.
    - More visitors are travelling by car into the state.



ACCOMMODATIONS USED IN NORTH CAROLINA

Hotels and other paid lodging remain the most common choice for overnight visitors, alongside notable shares choosing private rentals or staying with friends and family.



MOST COMMON ACTIVITIES

Visitor activities reflect a broad mix of dining, shopping, outdoor recreation and attractions.

- Many trips include multiple activities, highlighting the importance of a well-rounded destination experience.
- Activity participation varies by trip purpose, length of stay and visitor origin.

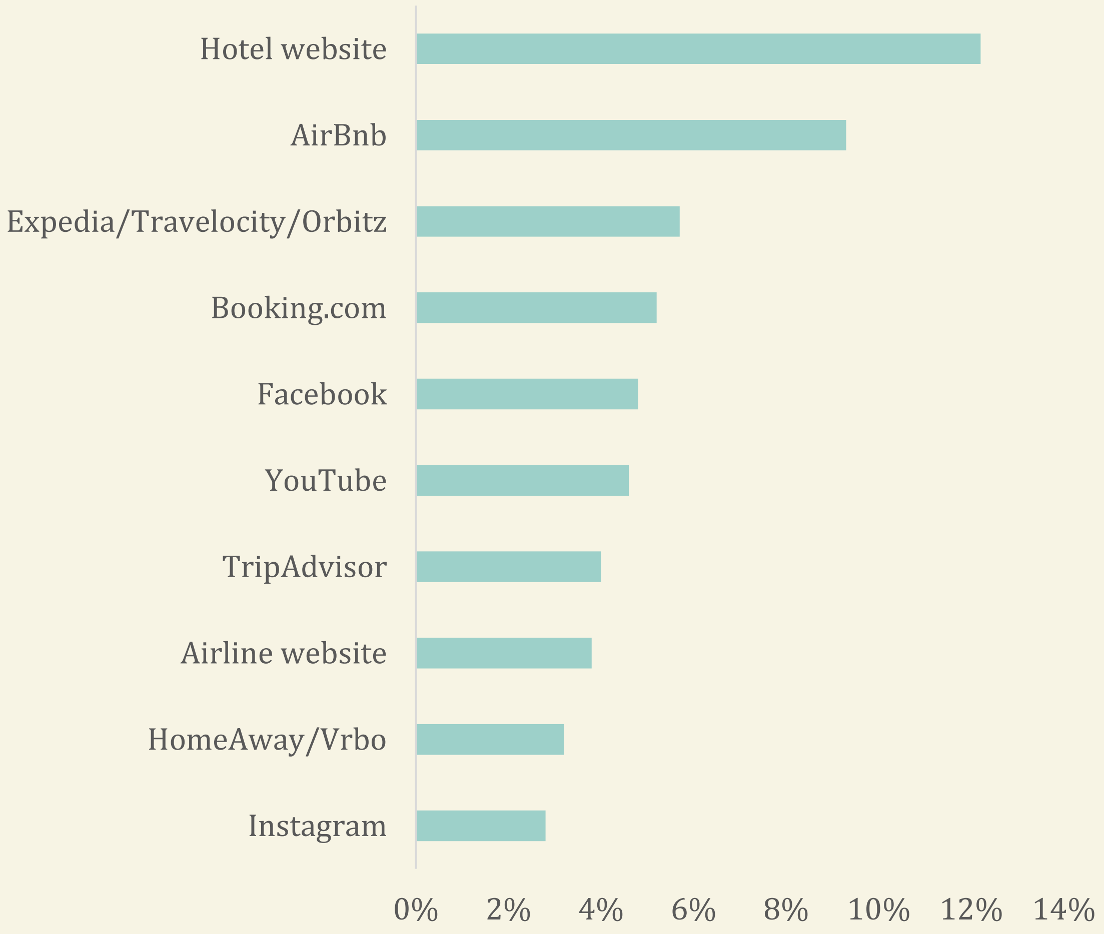
**Note that responses to this question are not mutually exclusive and percentages do not equal 100%. Therefore, proportions should not be aggregated to combine categories of activities. Also note that these activities do not imply purpose of trip.*

Overnight		Daytrippers	
Visiting friends/relatives	40%	Visiting friends/relatives	24%
Shopping	23%	Shopping	12%
Beach	21%	Historic sites	9%
Historic sites	16%	Rural sightseeing	9%
Fine dining	14%	Museums	9%
Rural sightseeing	12%	Fine dining	7%
Museums	11%	Beach	6%
Hiking/Backpacking/Canyoneering	11%	Local/folk arts/crafts	6%
Unique local cuisine	10%	Wildlife viewing	6%
Local/folk arts/crafts	9%	National park/Monuments/Recreation areas	5%
Wildlife viewing	9%	State park/Monuments/Recreation areas	5%
State park/Monuments/Rec areas	9%	Other nature (photos, rockhound, etc.)	5%
Fishing	7%	Unique local cuisine	4%
Swimming	7%	Art Galleries	4%
Gardens	6%	Sports events - Youth/Amateur/Collegiate (spectator)	4%
National park/Monuments/Rec areas	6%	Hiking/Backpacking/Canyoneering	4%
Craft breweries	6%	Fishing	4%
Urban sightseeing	6%	Musical festival	3%
Golf	5%	Craft breweries	3%
Other nature (photos, rockhound, etc.)	5%	Sports events - Major/Professional	3%

RESEARCH SOURCES

Visitors rely heavily on digital sources to research trip details and validate travel decisions.

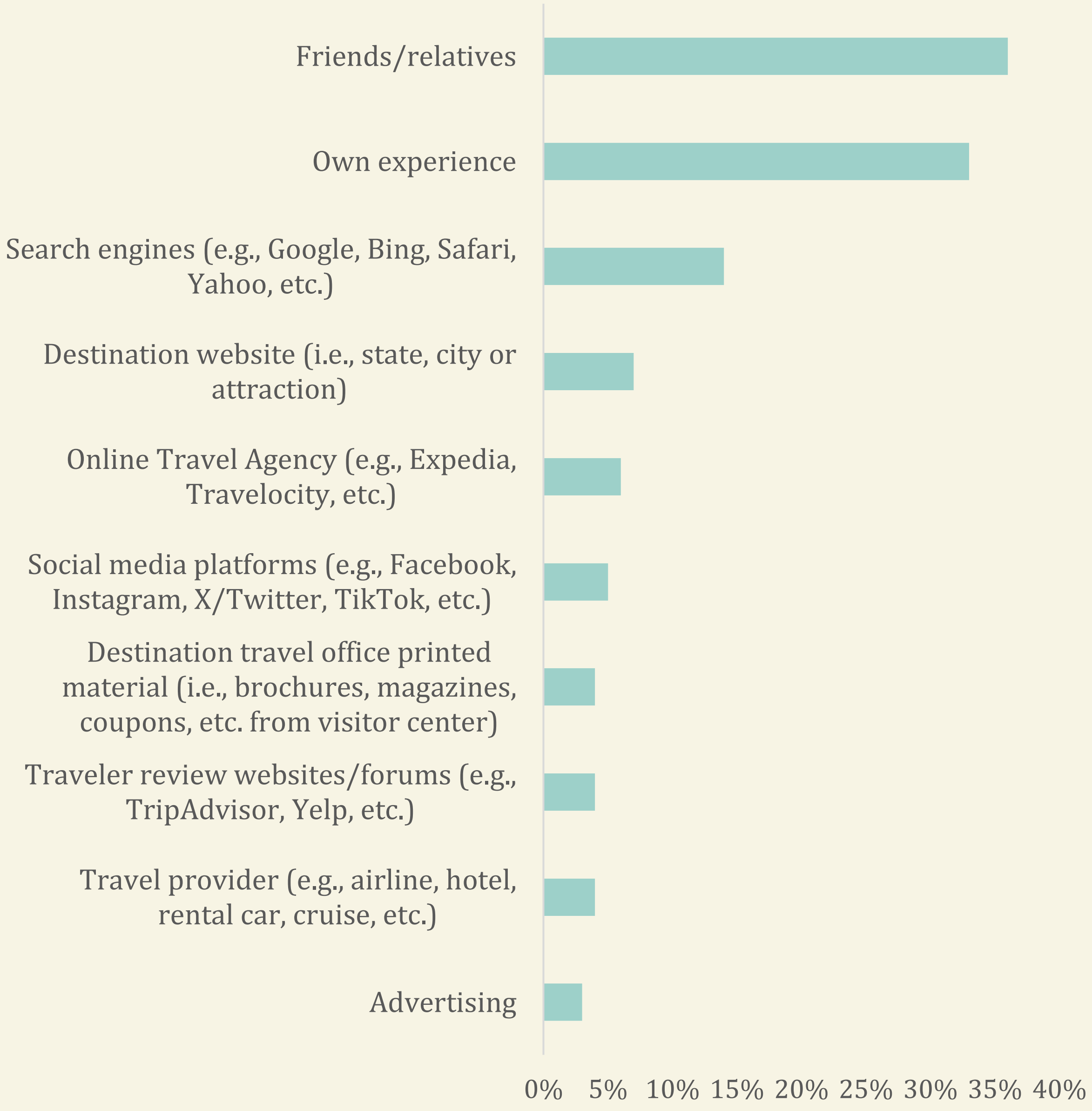
- Search and official destination websites play a central role in confirming logistics, accommodations and activities.
- Multiple research sources are commonly used, reflecting a layered and cautious decision-making process.



TRIP PLANNING SOURCES

Trip planning is shaped by a mix of personal experience, word-of-mouth and digital sources.

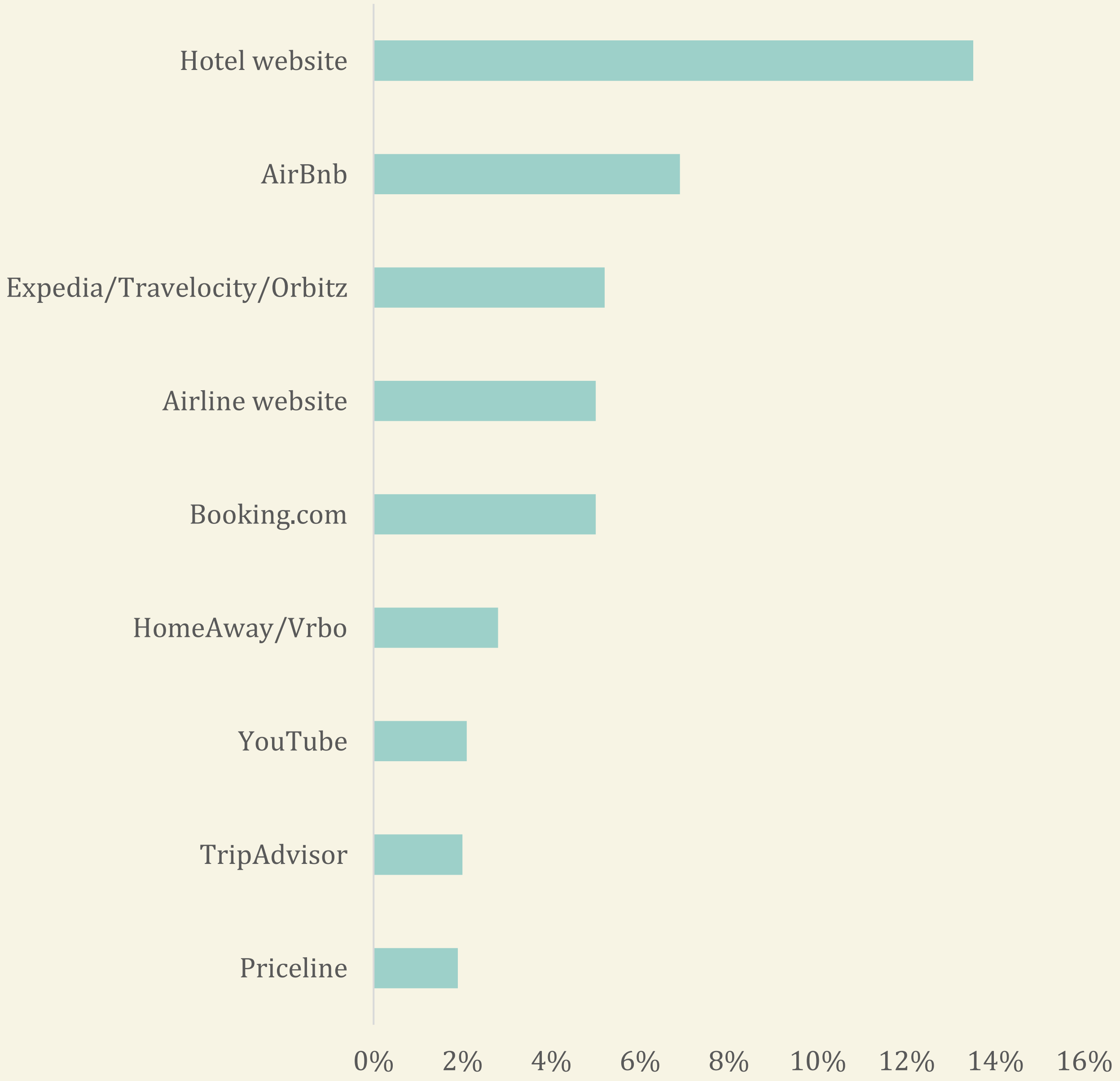
- Personal influences, such as past visits and recommendations from friends and family, remain a strong foundation for trip ideas.
- Digital sources complement personal experience, expanding awareness and shaping early trip consideration



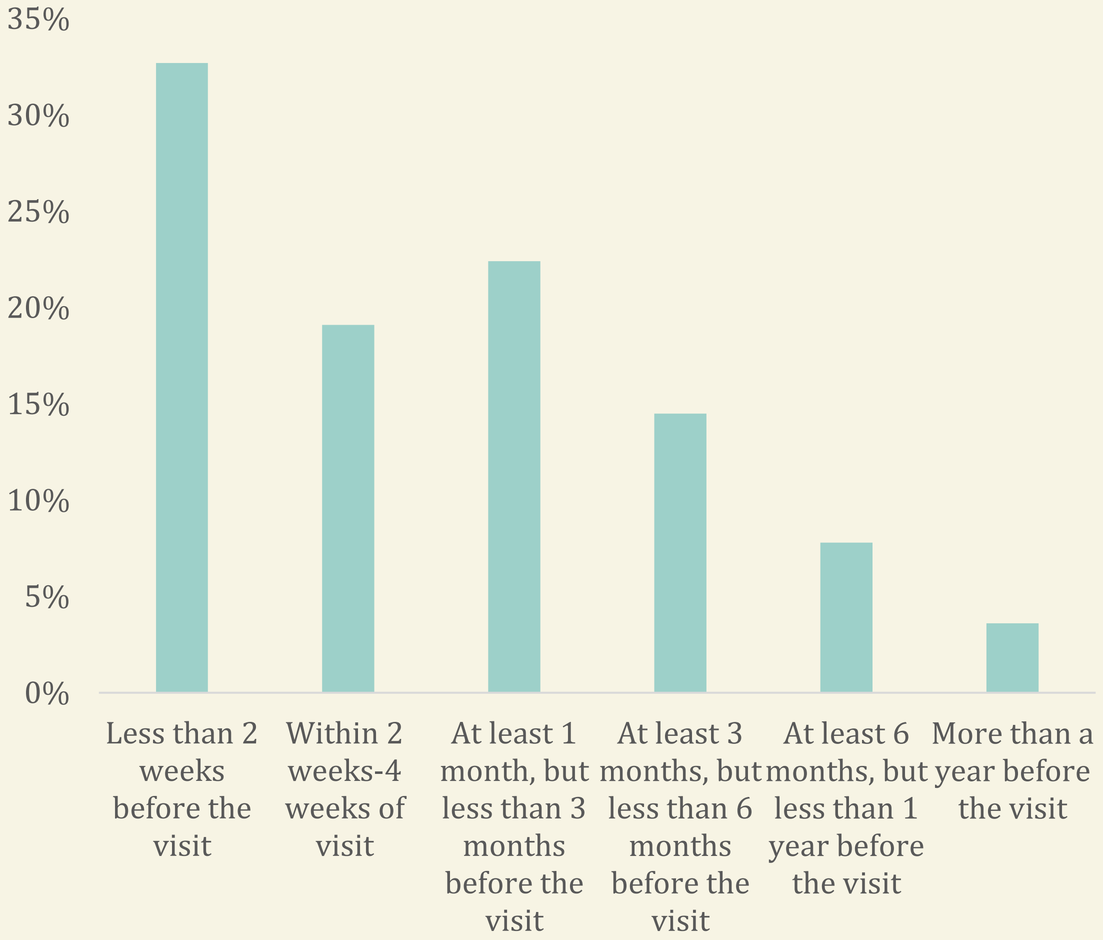
BOOKING BEHAVIOR

Direct and digital channels play a central role in booking behavior, with hotel websites leading as the most common source.

- Multiple booking sources are commonly used, reinforcing the non-linear nature of the travel decision process.



ADVANCE DECISION TIMING

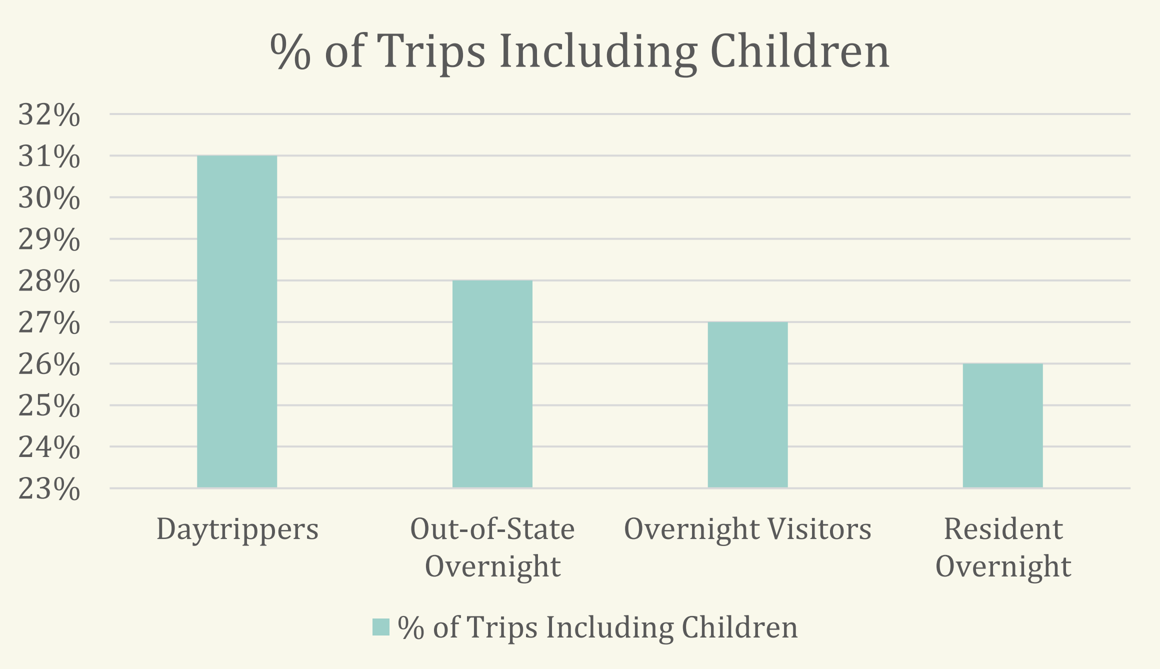


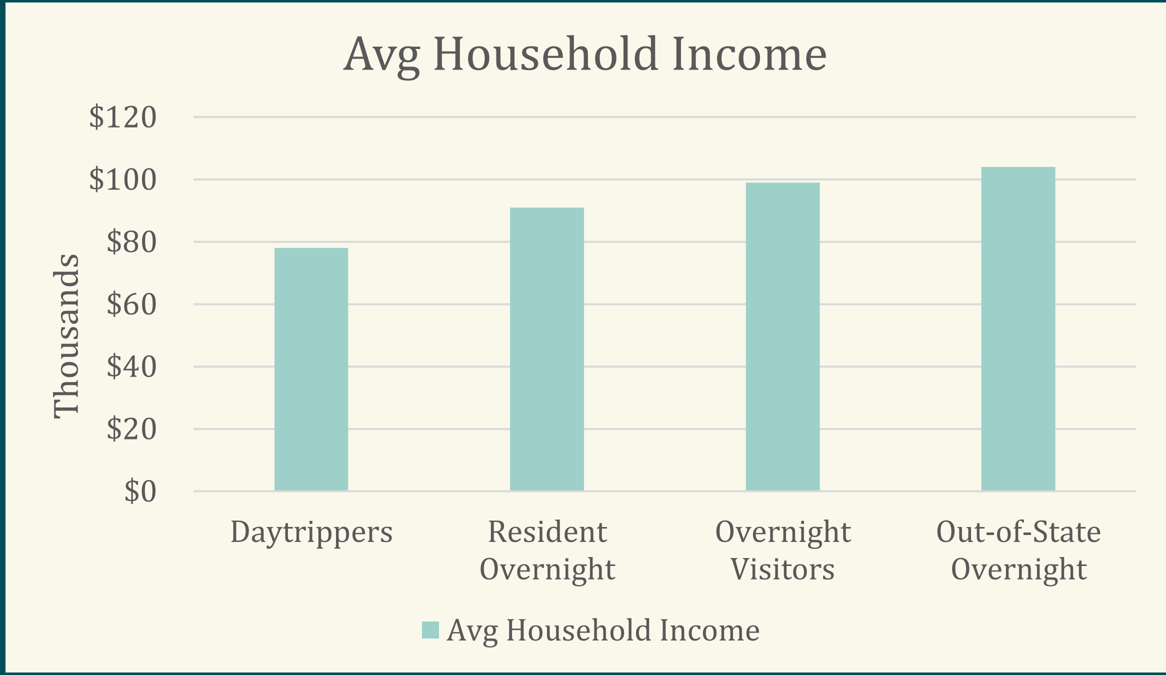
Many trips to North Carolina are planned within a relatively short timeframe.

- Short-notice decisions support flexible, proximity-based travel, particularly for repeat and regional visitors.
- Longer decision timelines reflect trips that require more coordination, research or advance planning.

TRAVEL PARTY CHARACTERISTICS

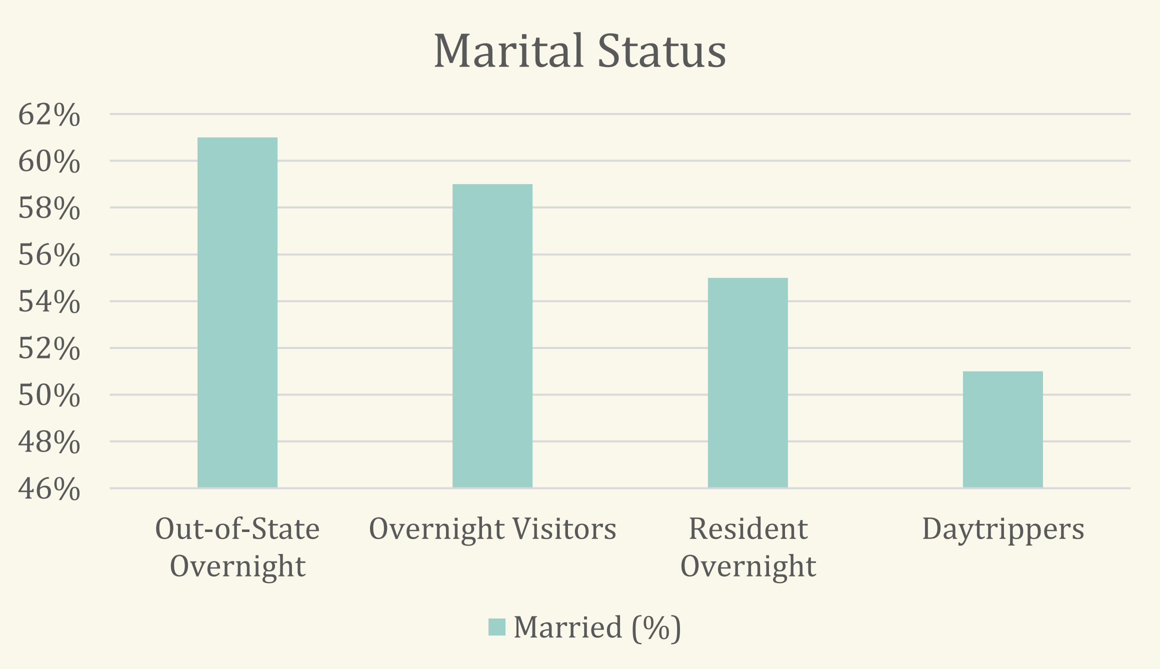
Average Party Size			
2.4	2.5	2.4	2.4
Overnight Visitors	Daytrippers	Resident Overnight Visitors	Out-of-State Overnight Visitors

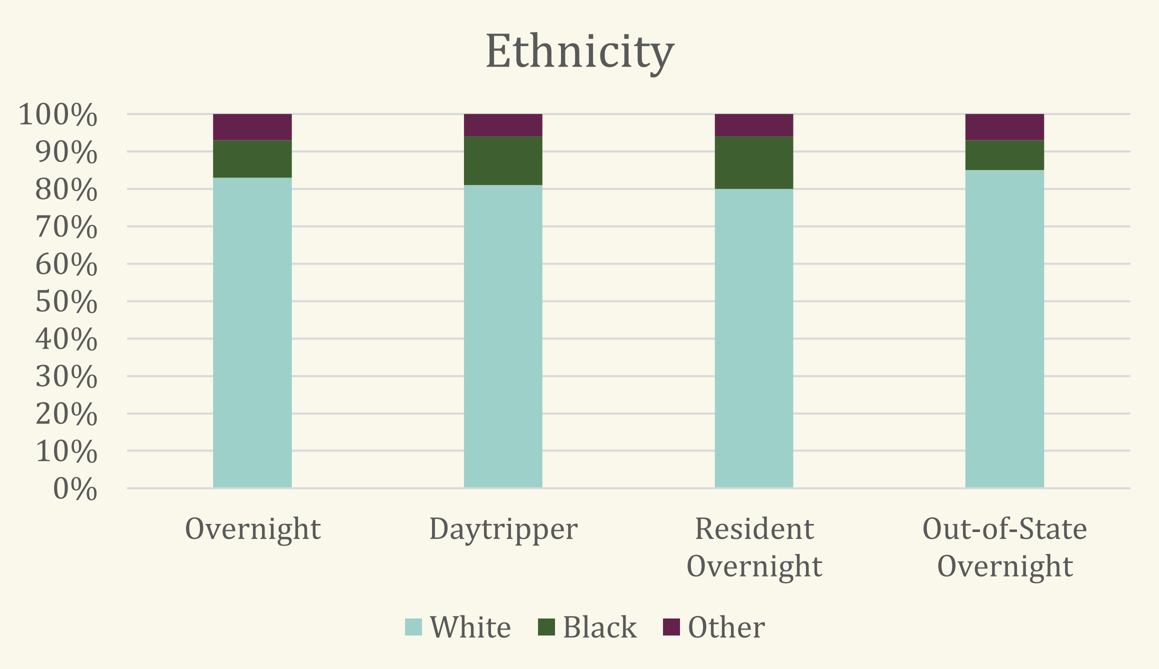




VISITOR DEMOGRAPHICS

Average Age			
Overnight Visitors	Daytrippers	Resident Overnight Visitors	Out-of-State Overnight Visitors
49 years	50 years	48 years	49 years





VISITOR SATISFACTION

Percent of visitors rating their experience 6 or higher on a 10-point scale			
96% Out-of-State Daytrippers	**93%** Resident Daytrippers	**95%** Resident Overnight Visitors	**98%** Out-of-State Overnight Visitors

Visitors consistently report high levels of satisfaction with their experiences in North Carolina.

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

GLOSSARY & 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.