

JUNE 2020

NORTH CAROLINA RESIDENT SENTIMENT

Impact of COVID-19





OVERVIEW

On behalf of Visit North Carolina, MMGY Global Travel Intelligence conducts an ongoing tracking study to monitor the impact of COVID-19 on North Carolina residents. Each report presents the most current data capturing changes in residents' attitudes toward travel and tourism in North Carolina as a result of COVID-19.

Survey Methodology

- A random sample of 1,200 North Carolina residents as defined below participated in the first of three planned surveys measuring North Carolina residents' sentiment toward tourism in the wake of COVID-19. Respondents are screened as follows:
 1. 18 years of age or older;
 2. Confirmed residence in the Coastal, Mountain and Piedmont regions of the state
- To ensure proper sample representation, a random sample of 400 respondents were selected from each of the three regions. Data were re-balanced to represent the population of North Carolina.
- Data in this report were collected between May 28 and June 8, 2020.
- Difference scores are provided for all ratings. This is simply the bottom 2 box (1 and 2) subtracted from the top 2 box (4 and 5). This score, ranging from -100% (least) to 100% (most), is an indication of the degree to which the respondent agrees with a statement, intends to engage in an activity, etc. A score of zero (0%) represents a neutral response.
- The error interval of the statistical estimates appearing in this report (for n=1,200) is +/- 2.8% at the 95% level of confidence.



The North Carolina Resident

Like the rest of the country, and the world, North Carolina residents have been impacted by COVID-19. Although residents understand the importance of tourism to the state's economy, residents are hesitant to travel and hesitant to welcome visitors into their communities. It will be important that safety protocols, such as mandatory face masks and social distancing, be in place in the destinations they visit.

In the coming months, North Carolina's tourism economy is going to be supported by its own residents as most have become more interested in traveling within the state, particularly by taking road trips to open-air destinations such as North Carolina's coast and mountains. Because sustainability is so important to North Carolina residents, they are likely to choose destinations that have demonstrated strong efforts in these area particularly as it relates to the protection of indigenous wildlife, species and the natural areas they live in.

Residents are anxious to get promotional information on destinations within North Carolina and the best way to do this is through TV advertising. North Carolina residents are proud of their state and are ready to explore what it has to offer.



/ Key Findings

- / As a result of COVID-19 North Carolina residents are likely to avoid large cities and large crowds. They will also take less crowded transportation and will consistently wear face masks. The youngest residents (18-34) of North Carolina are the most likely to engage in health and safety precautions.
- / Despite current concerns, 2 in 5 North Carolina residents view tourism as extremely important to the recovery of the North Carolina economy after COVID-19. Older (55+) residents and those who have lived in the state the longest are more likely to feel this way than younger residents or newcomers.
- / The use of face masks is by far the most essential safety protocol for residents to feel comfortable traveling after COVID-19. Social distancing is also very important, but it is clear that requiring face masks would go a long in encouraging North Carolinians to travel.
- / Although residents view tourism as important to North Carolina's post-COVID-19 recovery they are currently reluctant to travel themselves or to welcome travelers into their communities. However, 30% say COVID-19 has made them become more interested in vacationing within the state. Thus, North Carolinians are going to become the target market for many in-state destinations.



/ Key Findings

- / During the next three months 70% of North Carolina residents are likely to take a trip by car. And, they will most likely go to destinations offering open-air experiences such as the North Carolina coast or mountains. Although residents will seek outdoor destinations, they are not likely to include camping, as only 1 in 5 are likely to stay at a campground, about as many as are willing to travel by plane.
- / Being outdoors is important to North Carolinians as 3 in 5 residents feel access to outdoor recreation in North Carolina is important. While this is true for all age groups living in the state, it is most important to those who have lived there the longest.
- / This is evidenced by the fact that over 50% of residents participate in outdoor recreational activities on a daily or weekly basis. Surprisingly, the greatest daily participation is among older residents. Not surprising is that daily participation is also greatest among those who have lived in the state the longest.



/ Key Findings

- / Residents feel strongly that outdoor spaces are important and that the state should maintain them for everyone's use. In fact, those who have become residents in only the past five years say that access to outdoor activities that interest them is why they live in North Carolina. Overall, all residents are satisfied with the access to outdoor recreational opportunities in the state.
- / The destinations residents choose to visit are influenced by the destination's sustainability efforts, particularly among the youngest residents.
- / Compared to other states, most residents think North Carolina's sustainability efforts are better than other states they have experienced. This is true regardless of age, but those who have lived in the state the longest, think the highest of the state's efforts.
- / While all sustainability efforts are important to North Carolina residents, the most important are those protecting indigenous wildlife, natural areas and, habitats and species.



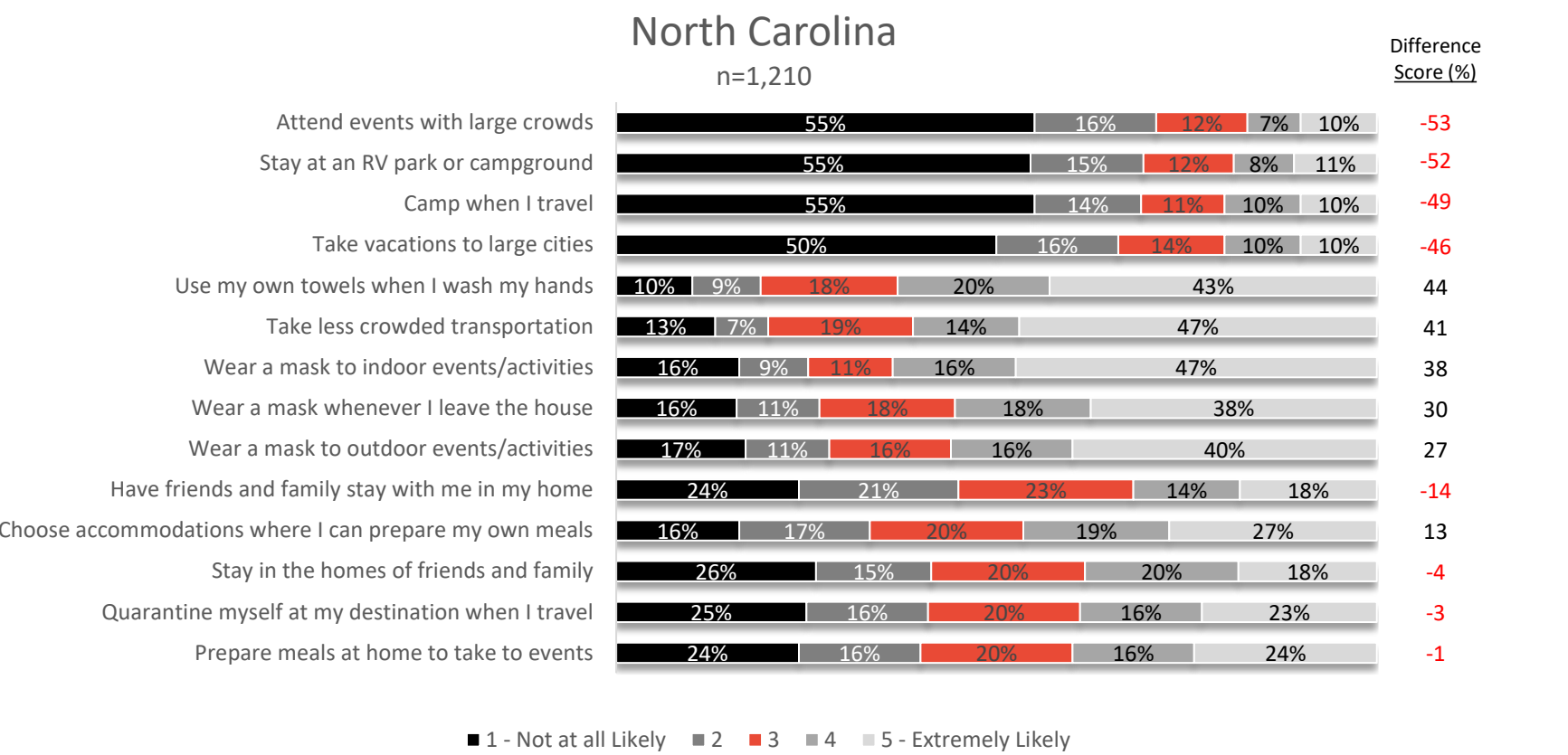
/ Key Findings

- / All North Carolinians love their state and want to protect its economic and environmental health. Those who have moved to the state within the past 5 years feel it is important to support local entrepreneurs, while long-term residents feel it is most important to protect the state's economic and environmental viability.
- / Residents feel that tourism has the most impact on the economic growth of North Carolina and its communities. They also feel that it has an impact on infrastructure, ambience, and the local ecology and environment.
- / North Carolina's residents would like to be informed about what is going on the state. Sixty percent of residents are interested in seeing promotional advertising for destinations within North Carolina and for the state as a destination.
- / Overwhelmingly they would like to get this information through TV advertising. Even younger residents prefer TV advertising above social media or digital advertising. All agree that the newspaper is the least desirable medium for this type of promotional advertising.

COVID-19



North Carolina Residents Will Likely Avoid Large Cities and Large Crowds



Q1: Using a scale of 1 (not at all likely) to 5 (extremely likely), as a result of your COVID-19 experience, please indicate how likely you are to do each of the following?

Youngest and Oldest Residents Most Likely to Take Health and Safety Precautions

North Carolina

Difference Scores (%)

	18-34 n=346	35-54 n=423	55+ n=420
Attend events with large crowds	-42	-43	-72
Stay at an RV park or campground	-44	-38	-71
Camp when I travel	-35	-39	-71
Take vacations in large cities	-37	-27	-71
Use my own towels when I wash my hands	46	28	54
Take less crowded transportation	52	34	35
Wear a mask to indoor events/activities	39	28	46
Wear a mask whenever I leave the house	41	15	34
Wear a mask to outdoor events/activities	33	15	32
Have friends and family stay with me in my home	2	-8	-31
Choose accommodations where I can prepare my own meals	40	9	-7
Stay in the homes of friends and family	14	-2	-20
Quarantine myself at my destination when I travel	14	-6	-13
Prepare meals at home to take to events	16	-5	-16

Q1: Using a scale of 1 (not at all likely) to 5 (extremely likely), as a result of your COVID-19 experience, please indicate how likely you are to do each of the following?

Newcomers to North Carolina are the Most Likely Wear Masks, and the Most Likely to Stay in the Homes of Friends and Family

North Carolina

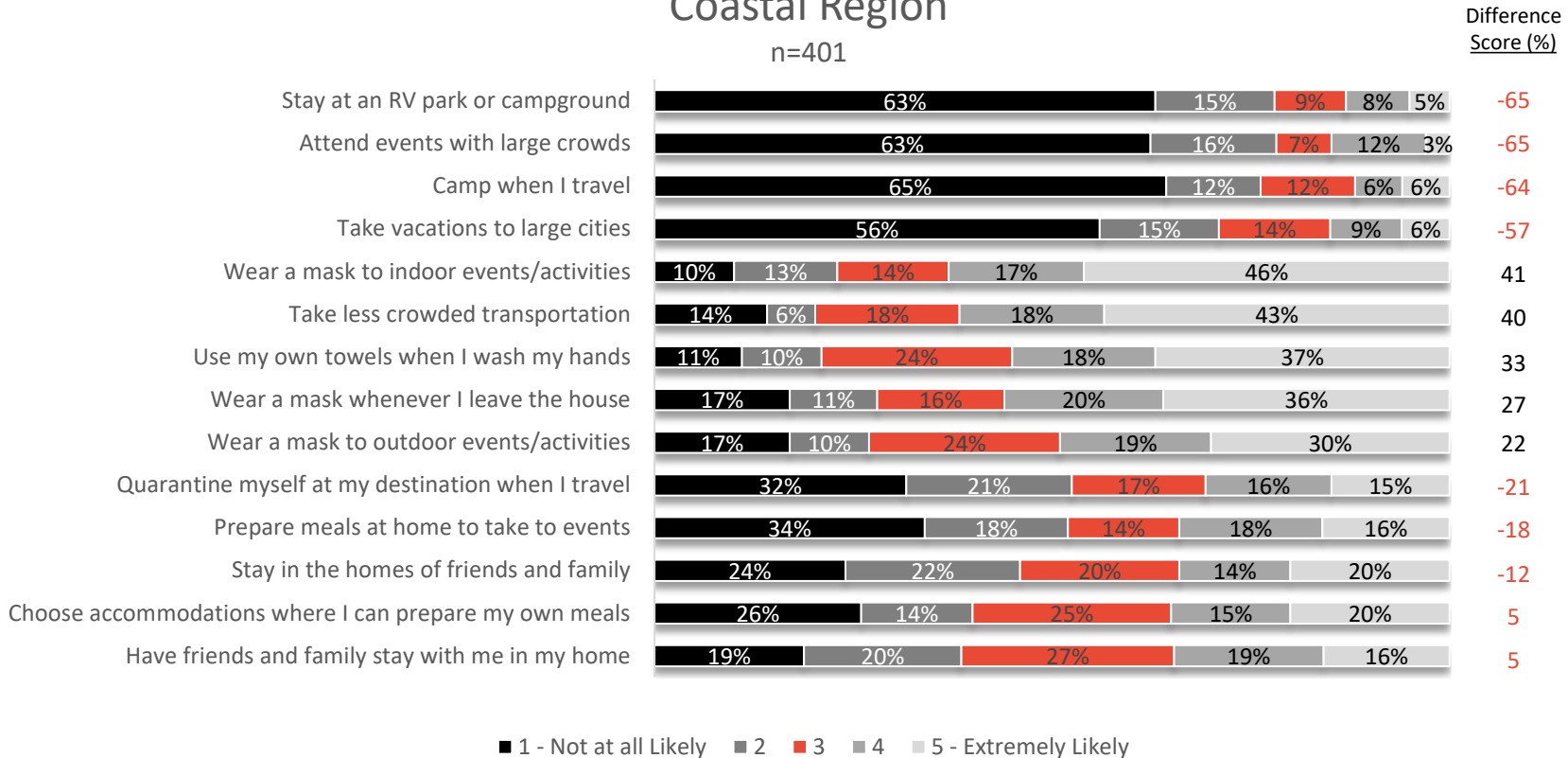
Difference Scores (%)

	<5 Years n=148	5-10 Years n=184	11-20 Years n=234	20+ Years n=255	Born in NC n=389
Attend events with large crowds	-23	-56	-54	-43	-66
Stay at an RV park or campground	-46	-54	-52	-39	-58
Camp when I travel	-33	-53	-38	-47	-59
Take vacations in large cities	-42	-26	-48	-34	-60
Use my own towels when I wash my hands	43	36	38	47	48
Take less crowded transportation	49	27	42	38	44
Wear a mask to indoor events/activities	59	32	43	44	30
Wear a mask whenever I leave the house	54	22	30	34	23
Wear a mask to outdoor events/activities	35	17	41	29	22
Have friends and family stay with me in my home	-20	5	-4	-16	-21
Choose accommodations where I can prepare my own meals	16	13	17	25	5
Stay in the homes of friends and family	45	-6	11	-4	-24
Quarantine myself at my destination when I travel	17	5	-5	12	-18
Prepare meals at home to take to events	19	-23	13	2	-7

Q1: Using a scale of 1 (not at all likely) to 5 (extremely likely), as a result of your COVID-19 experience, please indicate how likely you are to do each of the following?

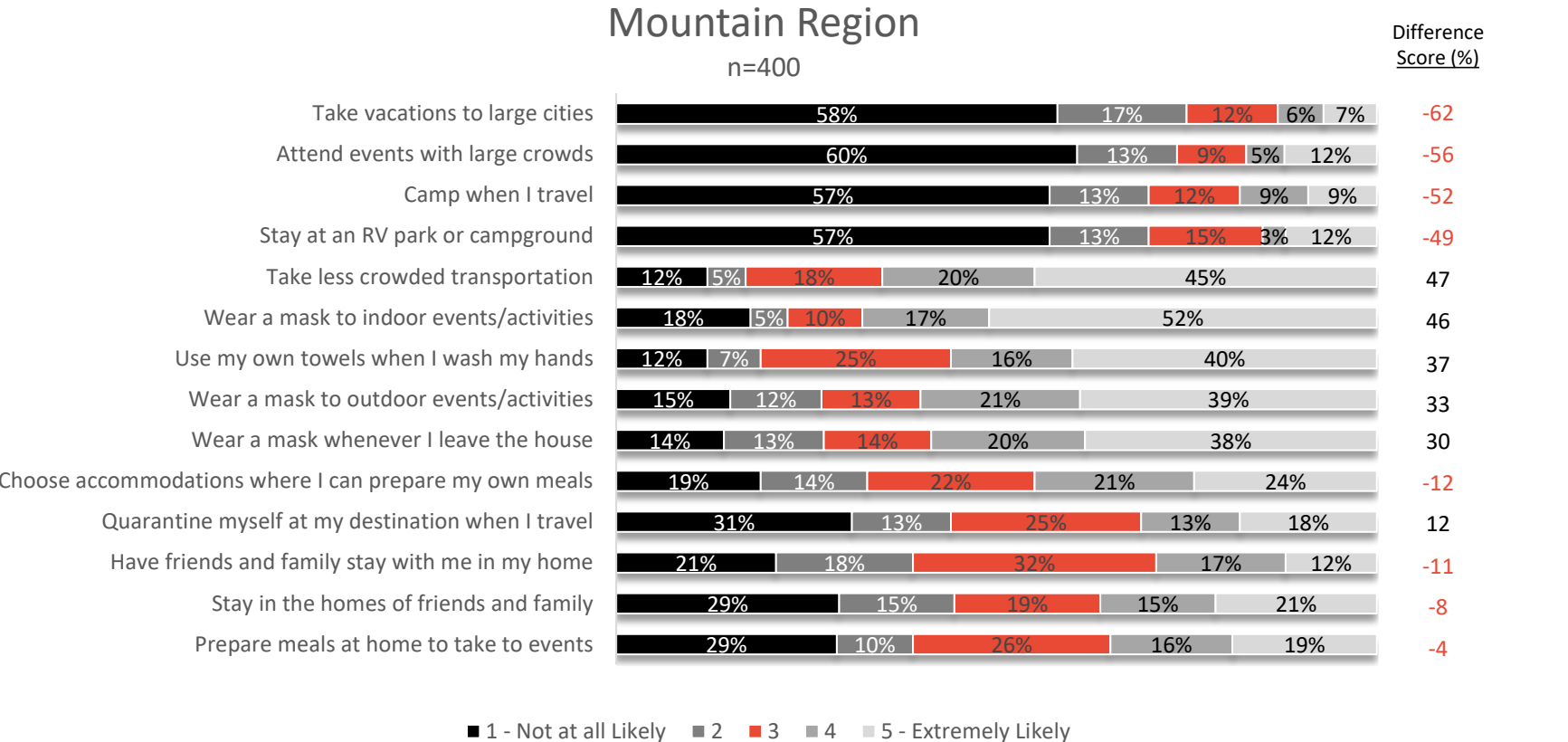
Activity Engagement as a Result of COVID-19

Coastal Region n=401



Q1: Using a scale of 1 (not at all likely) to 5 (extremely likely), as a result of your COVID-19 experience, please indicate how likely you are to do each of the following?

Activity Engagement as a Result of COVID-19

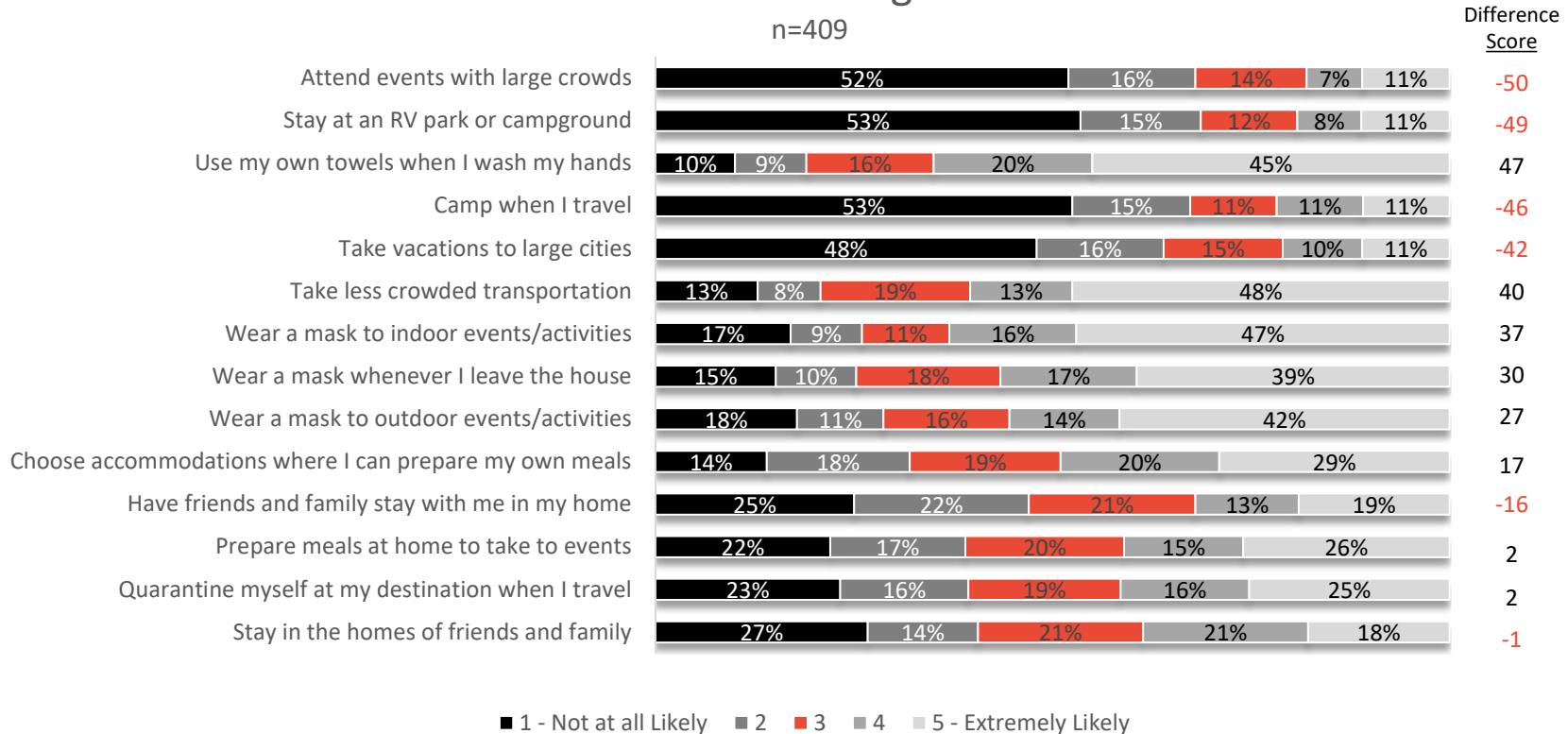


Q1: Using a scale of 1 (not at all likely) to 5 (extremely likely), as a result of your COVID-19 experience, please indicate how likely you are to do each of the following?

Activity Engagement as a Result of COVID-19

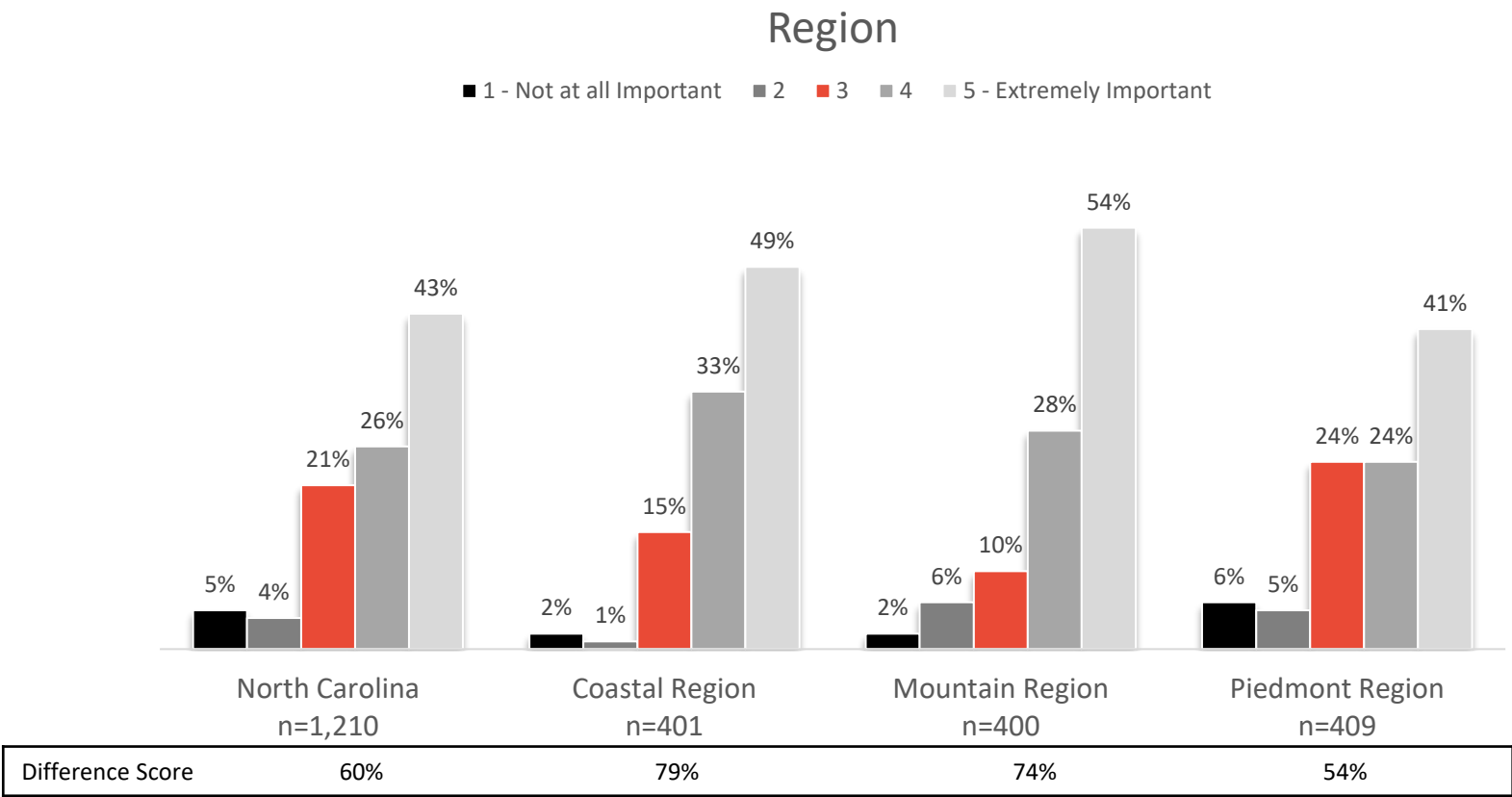
Piedmont Region

n=409



Q1: Using a scale of 1 (not at all likely) to 5 (extremely likely), as a result of your COVID-19 experience, please indicate how likely you are to do each of the following?

Tourism Viewed as Important to North Carolina's Post-COVID-19 Recovery

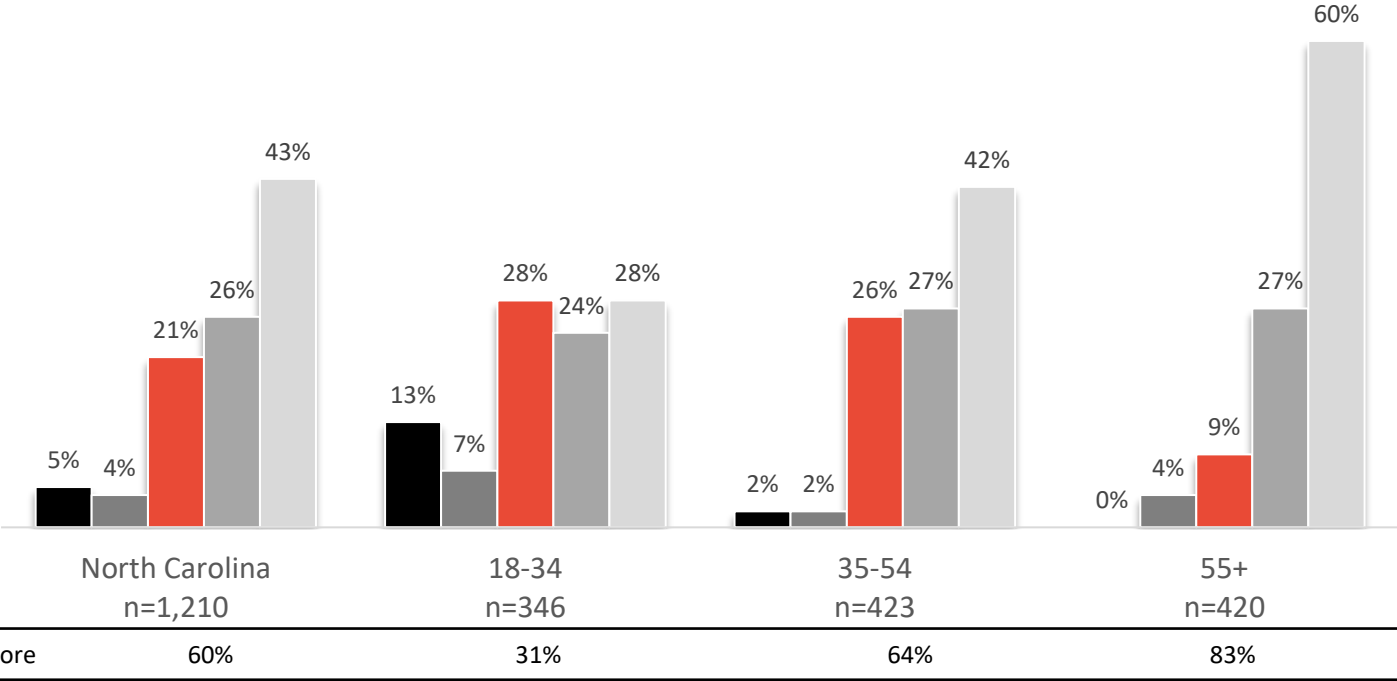


Q2: Using a scale of 1 (not at all important) to 5 (extremely important), how important do you think tourism is to the recovery of the North Carolina economy after COVID-19?

Older Residents View Tourism as More Important to North Carolina's Post-COVID-19 Recovery Than Do Younger Residents

Resident Age

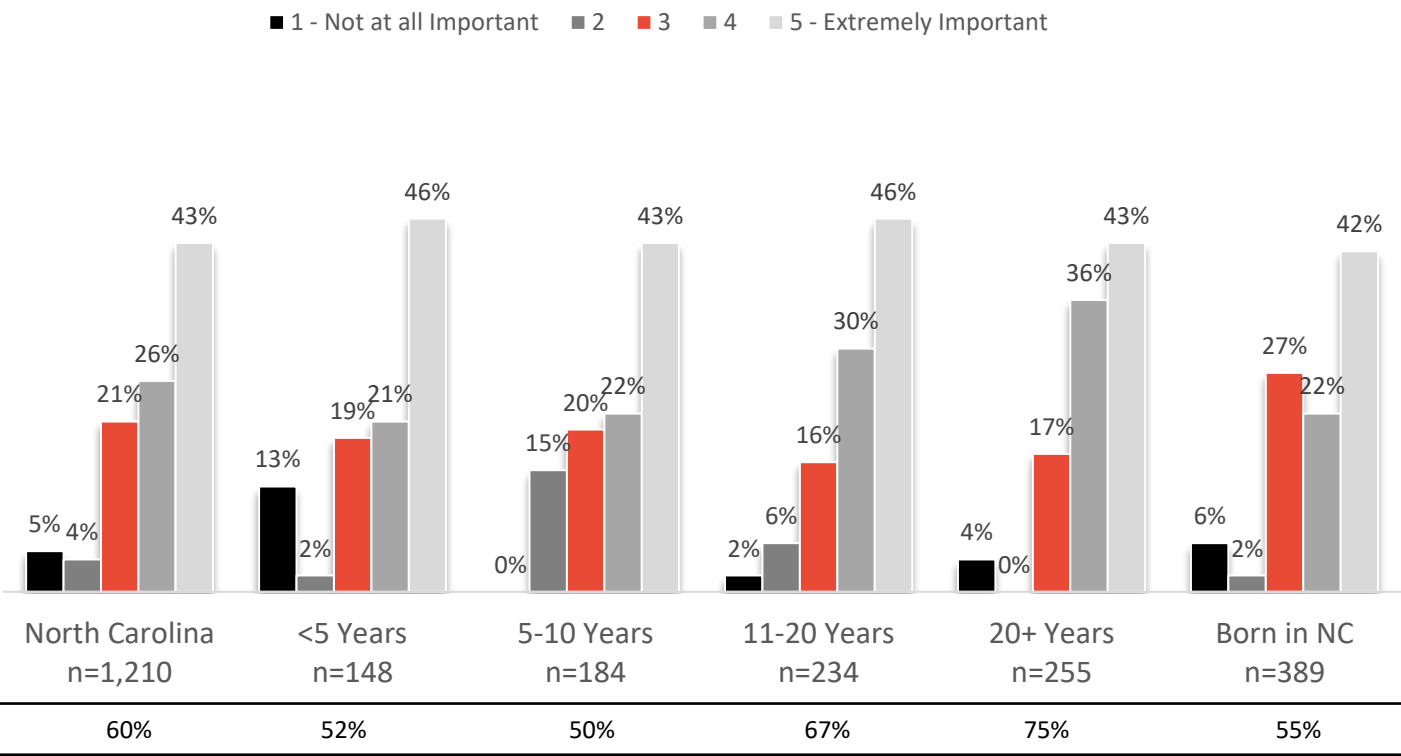
■ 1 - Not at all Important ■ 2 ■ 3 ■ 4 ■ 5 - Extremely Important



Q2: Using a scale of 1 (not at all important) to 5 (extremely important), how important do you think tourism is to the recovery of the North Carolina economy after COVID-19?

Those Living in North Carolina the Longest View Tourism as Important to North Carolina's Post-COVID-19 Recovery

Length of Residency



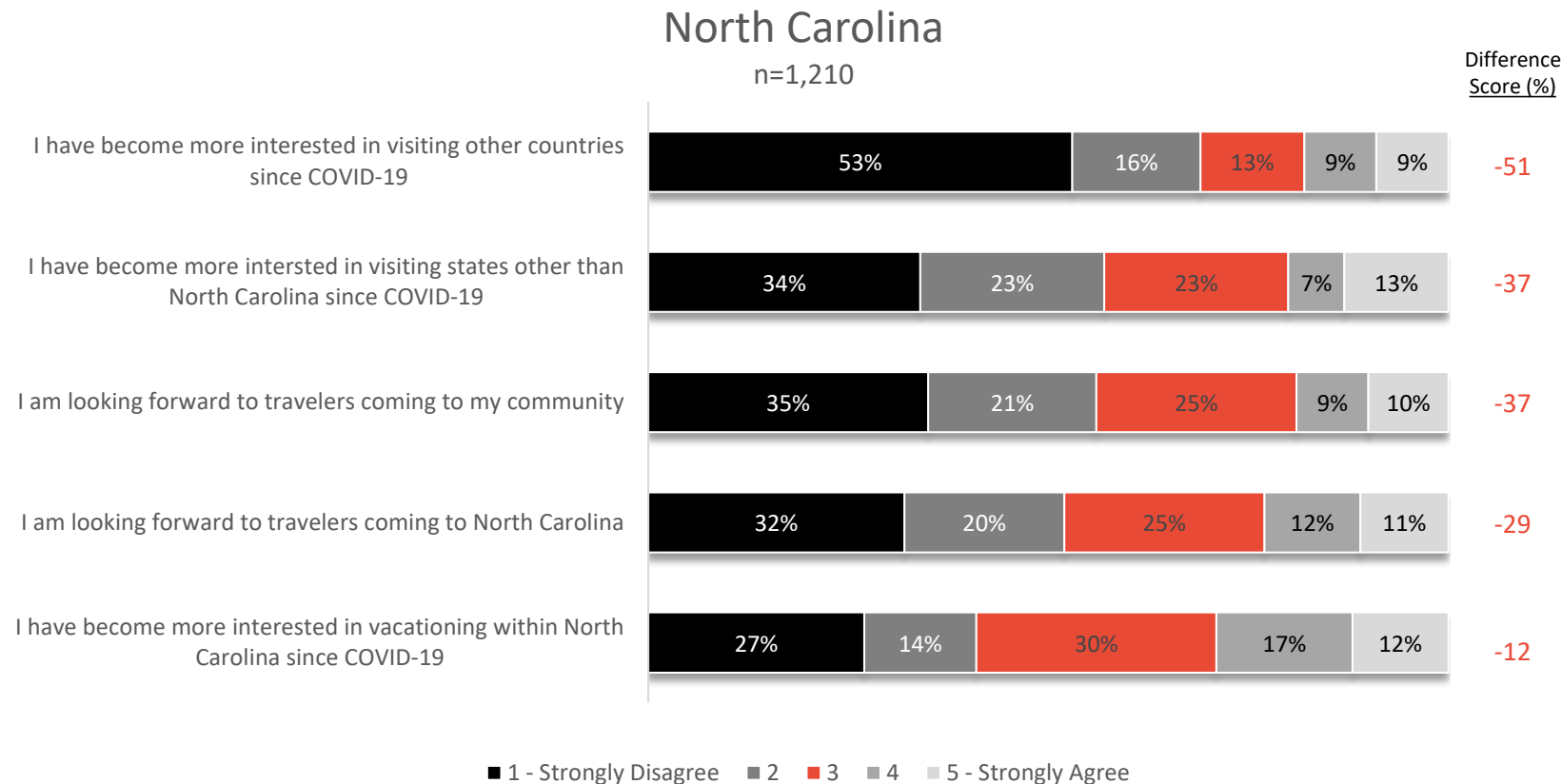
Q2: Using a scale of 1 (not at all important) to 5 (extremely important), how important do you think tourism is to the recovery of the North Carolina economy after COVID-19?

Wearing Face Masks, Social Distancing and Washing Hands Most Often Cited Safety Protocols Essential for Travel After COVID-19



Q3: Please list up to five (5) safety protocols that you feel are essential for you to travel after COVID-19.

North Carolina Residents Not Yet Ready to Travel or Welcome Visitors



Q4: Using a scale of 1 (strongly disagree) to 5 (strongly agree), please indicate your level of agreement with each of the following statements now that the North Carolina COVID-19 restrictions are beginning to ease.

Oldest Residents Most Interested in Vacationing Within North Carolina

North Carolina Difference Scores (%)

	18-34 n=346	35-54 n=423	55+ n=420
I have become more interested in visiting other counties since COVID-19	-23	-49	-77
I have become more interested in visiting states other than North Carolina since COVID-19	-25	-38	-46
I am looking forward to travelers coming to my community	-35	-27	-46
I am looking forward to travelers coming to North Carolina	-26	-19	-38
I have become more interested in vacationing within North Carolina since COVID-19	-20	-18	--

Q4: Using a scale of 1 (strongly disagree) to 5 (strongly agree), please indicate your level of agreement with each of the following statements now that the North Carolina COVID-19 restrictions are beginning to ease.

Those Residing in North Carolina Between 11 and 20 Years Only Group With a Positive Sentiment Toward Travel in North Carolina

North Carolina Difference Scores (%)

	<5 Years n=148	5-10 Years n=184	11-20 Years n=234	20+ Years n=255	Born in NC n=389
I have become more interested in visiting other counties since COVID-19	-43	-60	-37	-41	-61
I have become more interested in visiting states other than North Carolina since COVID-19	-38	-37	-38	-26	-41
I am looking forward to travelers coming to my community	-34	-39	-31	-15	-50
I am looking forward to travelers coming to North Carolina	-31	-34	-26	-15	-34
I have become more interested in vacationing within North Carolina since COVID-19	-19	-35	9	-6	-14

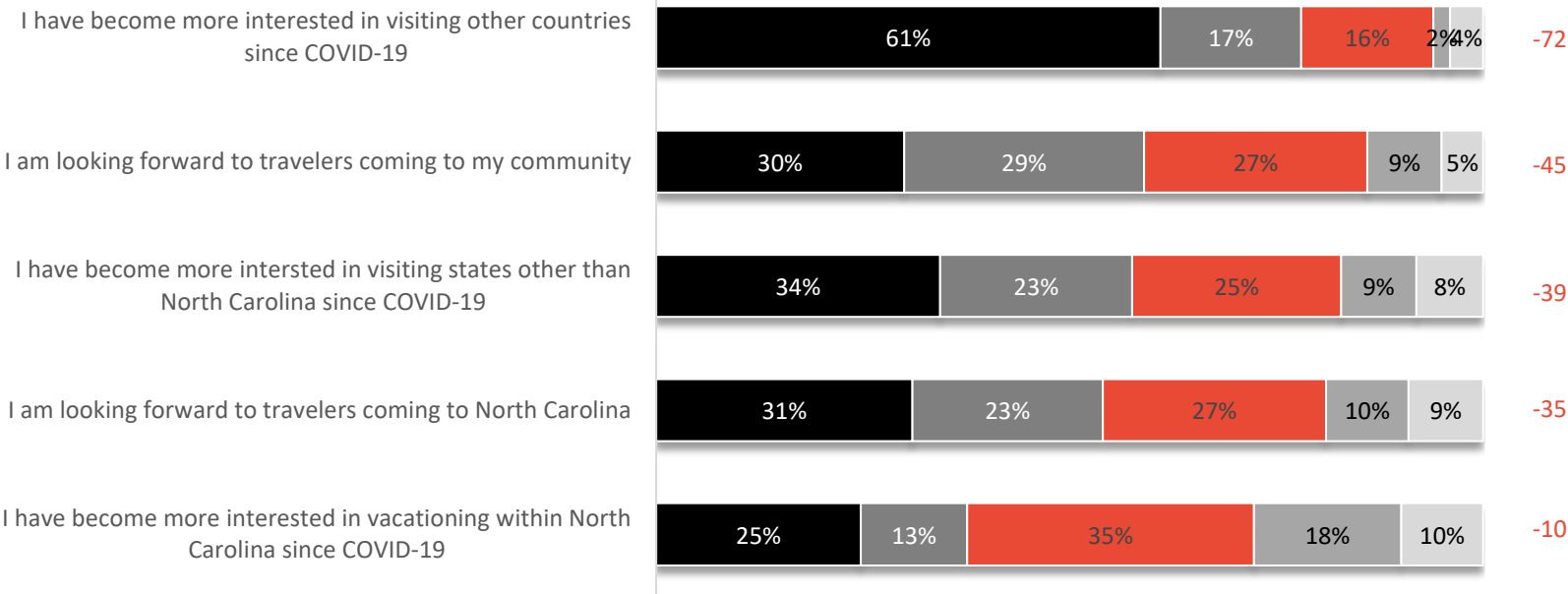
Q4: Using a scale of 1 (strongly disagree) to 5 (strongly agree), please indicate your level of agreement with each of the following statements now that the North Carolina COVID-19 restrictions are beginning to ease.

Interest in Traveling and Welcoming Visitors

Coastal Region

n=401

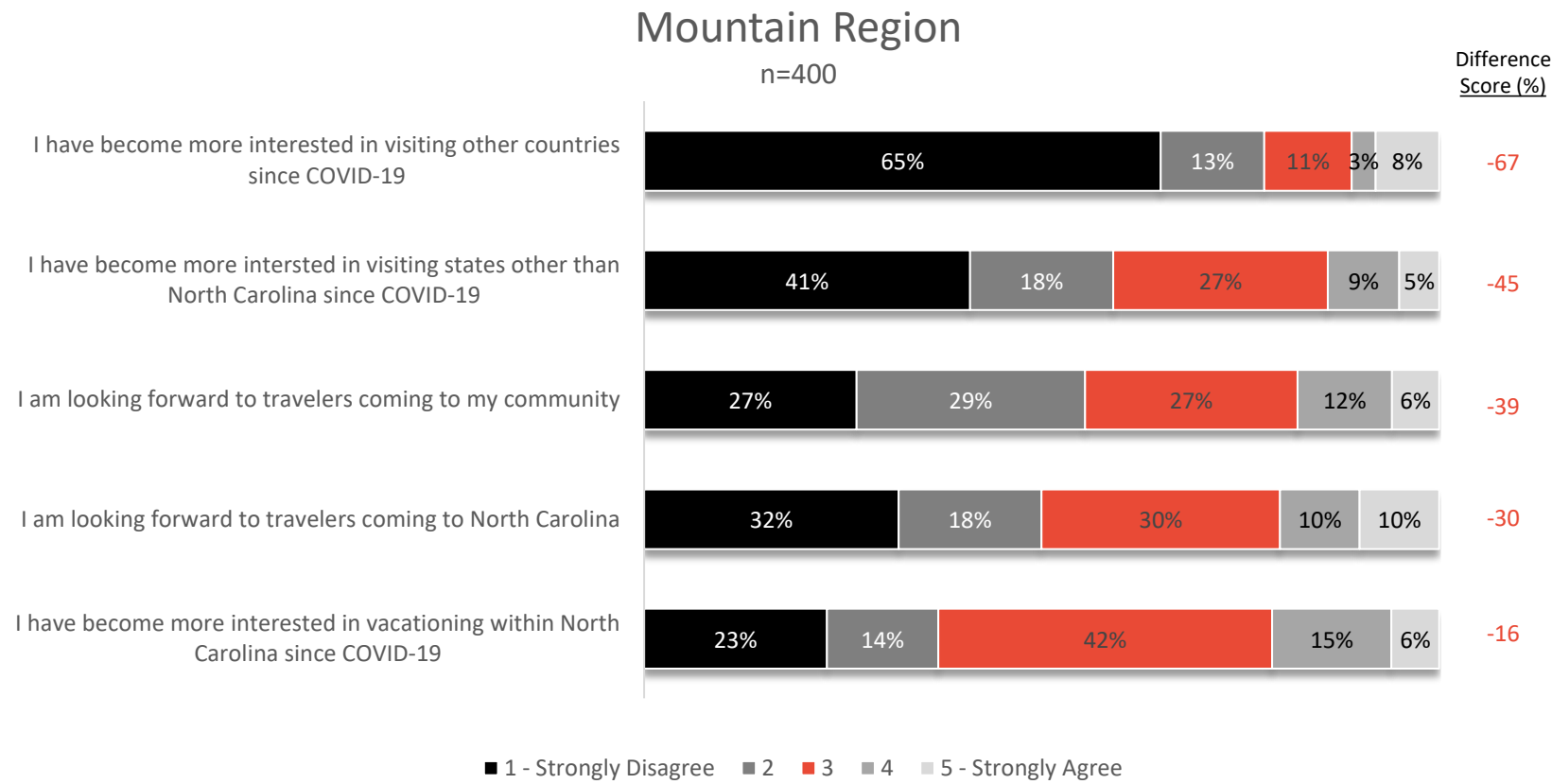
Difference
Score (%)



■ 1 - Strongly Disagree ■ 2 ■ 3 ■ 4 ■ 5 - Strongly Agree

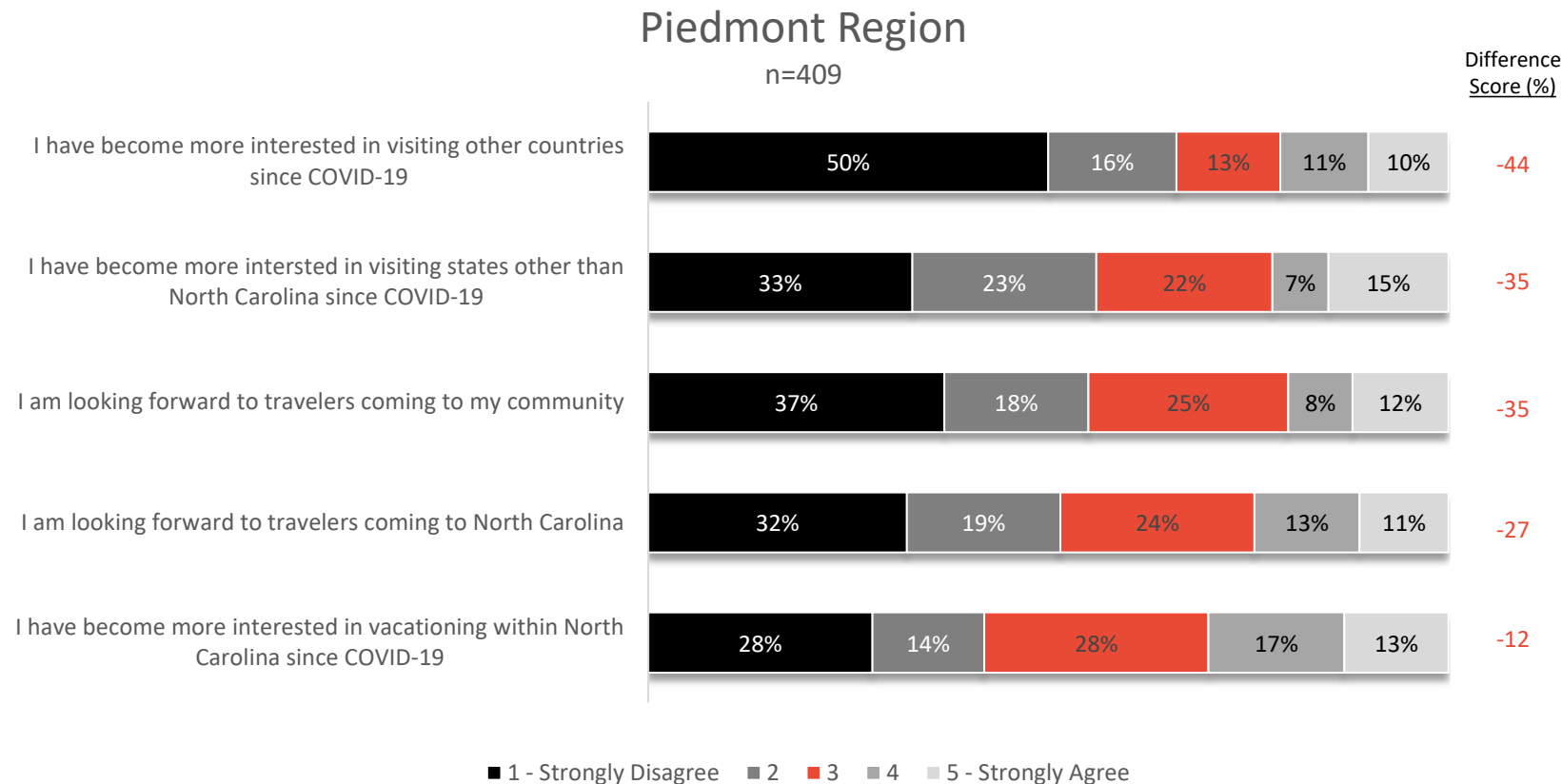
Q4: Using a scale of 1 (strongly disagree) to 5 (strongly agree), please indicate your level of agreement with each of the following statements now that the North Carolina COVID-19 restrictions are beginning to ease.

Interest in Traveling and Welcoming Visitors



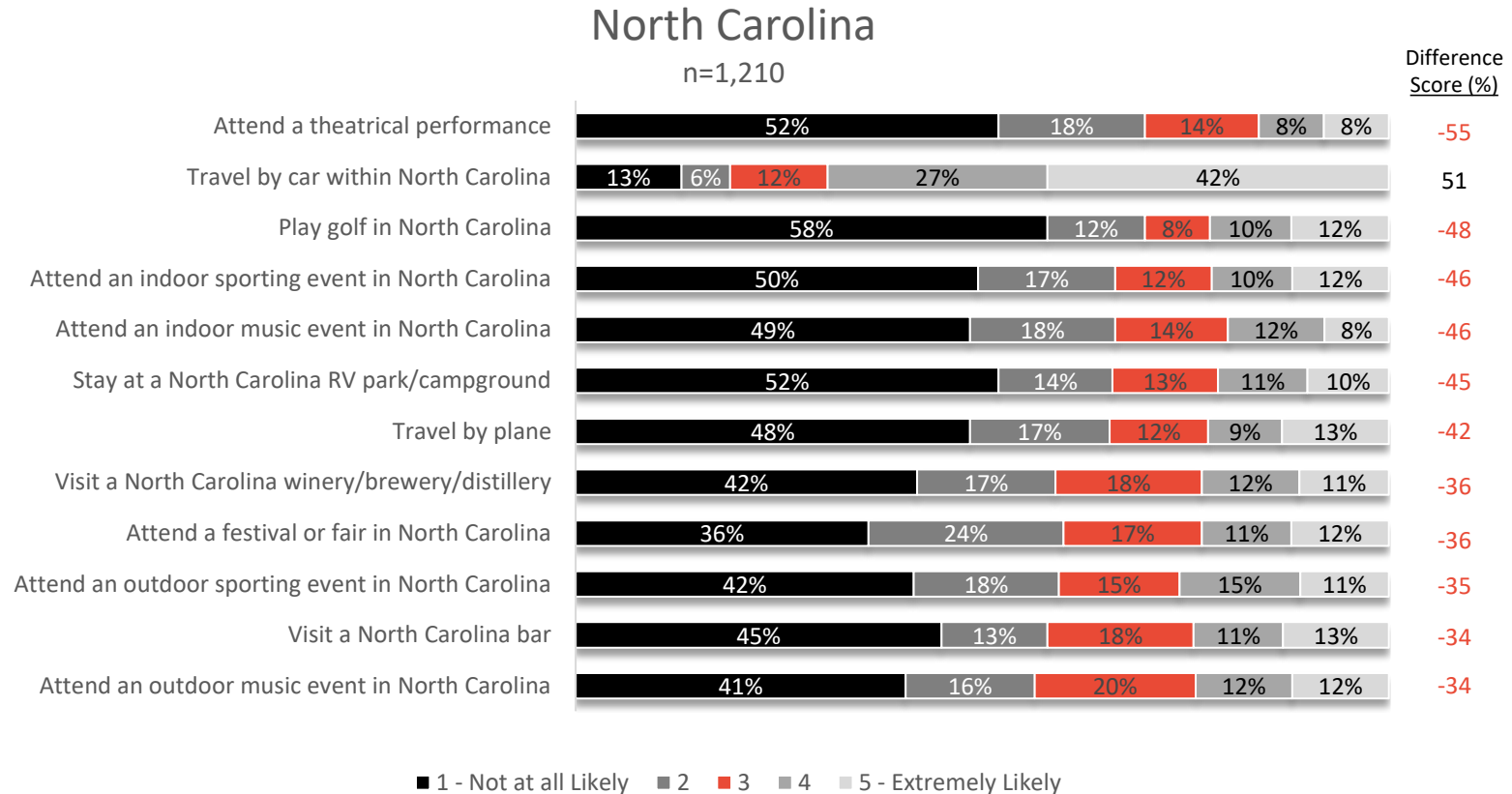
Q4: Using a scale of 1 (strongly disagree) to 5 (strongly agree), please indicate your level of agreement with each of the following statements now that the North Carolina COVID-19 restrictions are beginning to ease.

Interest in Traveling and Welcoming Visitors



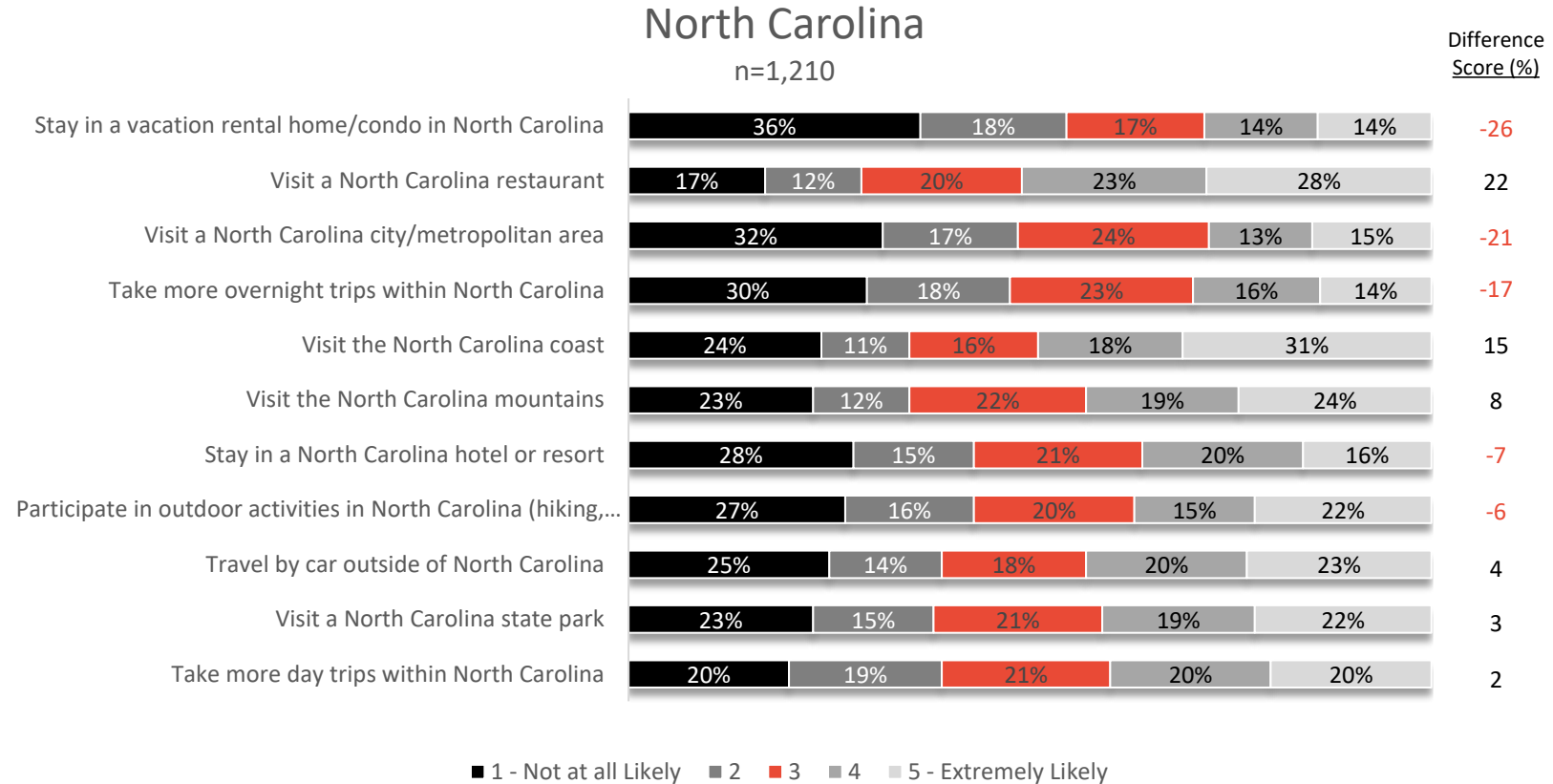
Q4: Using a scale of 1 (strongly disagree) to 5 (strongly agree), please indicate your level of agreement with each of the following statements now that the North Carolina COVID-19 restrictions are beginning to ease.

Traveling by Car to North Carolina Outdoor Destinations Most Likely in Next 3 Months



Q5: Using a scale of 1 (not at all likely) to 5 (extremely likely), please indicate how likely you are to engage in each of the following activities during the next 3 months now that the North Carolina COVID-19 restrictions are beginning to ease.

Traveling by Car to North Carolina Outdoor Destinations Most Likely in Next 3 Months



Q5: Using a scale of 1 (not at all likely) to 5 (extremely likely), please indicate how likely you are to engage in each of the following activities during the next 3 months now that the North Carolina COVID-19 restrictions are beginning to ease.

All Residents Very Likely to Travel by Car Within North Carolina During the Next Three Months

North Carolina Difference Scores (%)

	18-34 n=346	35-54 n=423	55+ n=420
Attend a theatrical performance	-37	-52	-72
Travel by car within North Carolina	35	59	59
Play golf in North Carolina	-44	-41	-41
Attend an indoor sporting event in North Carolina	-20	-39	-74
Attend an indoor music event in North Carolina	-18	-40	-77
Stay at a North Carolina RV park/campground	-30	-28	-75
Travel by plane	-34	-35	-56
Visit a North Carolina winery/brewery/distillery	-18	-33	-53
Attend a festival or fair in North Carolina	-24	-24	-57
Attend an outdoor sporting event in North Carolina	-18	-31	-51
Visit a North Carolina bar	-23	-22	-55
Attend an outdoor music event in North Carolina	-7	-33	-57

Q5: Using a scale of 1 (not at all likely) to 5 (extremely likely), please indicate how likely you are to engage in each of the following activities during the next 3 months now that the North Carolina COVID-19 restrictions are beginning to ease.

And, Residents 35-54 Years of Age Most Likely Visitors to North Carolina Destinations During the Next Three Months

North Carolina Difference Scores (%)

	18-34 n=346	35-54 n=423	55+ n=420
Stay in a vacation rental home/condo in North Carolina	-25	-7	-45
Visit a North Carolina restaurant	18	30	19
Visit a North Carolina city/metropolitan area	-2	-10	-48
Take more overnight trips within North Carolina	-16	-8	-24
Visit the North Carolina coast	9	23	13
Visit the North Carolina mountains	-3	9	19
Stay in a North Carolina hotel or resort	-12	6	-11
Participate in outdoor activities in North Carolina (hiking, biking, kayaking, etc.)	7	1	-23
Travel by car outside of North Carolina	-1	19	-3
Visit a North Carolina state park	--	15	-5
Take more day trips within North Carolina	-10	9	6

Q5: Using a scale of 1 (not at all likely) to 5 (extremely likely), please indicate how likely you are to engage in each of the following activities during the next 3 months now that the North Carolina COVID-19 restrictions are beginning to ease.

All Residents, Regardless of How Long They Have Lived in the State are Likely to Travel by Car Within North Carolina During the Next Three Months

North Carolina

Difference Scores (%)

	<5 Years n=148	5-10 Years n=184	11-20 Years n=234	20+ Years n=255	Born in NC n=389
Attend a theatrical performance	-35	-55	-61	-41	-66
Travel by car within North Carolina	26	42	56	67	51
Play golf in North Carolina	-49	-53	-16	-34	-66
Attend an indoor sporting event in North Carolina	-17	-45	-48	-38	-58
Attend an indoor music event in North Carolina	-41	-49	-43	-43	-50
Stay at a North Carolina RV park/campground	-47	-57	-34	-35	-51
Travel by plane	-50	-42	-36	-24	-52
Visit a North Carolina winery/brewery/distillery	-23	-40	-19	-28	-49
Attend a festival or fair in North Carolina	-26	-35	-22	-26	-50
Attend an outdoor sporting event in North Carolina	-27	-39	-31	-23	-43
Visit a North Carolina bar	-30	-43	-17	-26	-44
Attend an outdoor music event in North Carolina	-5	-42	-38	-28	-40

Q5: Using a scale of 1 (not at all likely) to 5 (extremely likely), please indicate how likely you are to engage in each of the following activities during the next 3 months now that the North Carolina COVID-19 restrictions are beginning to ease.

But, Those Residing in the State Between 5 and 10 Years Are Least Likely to Travel to Most North Carolina Destinations During the Next Three Months

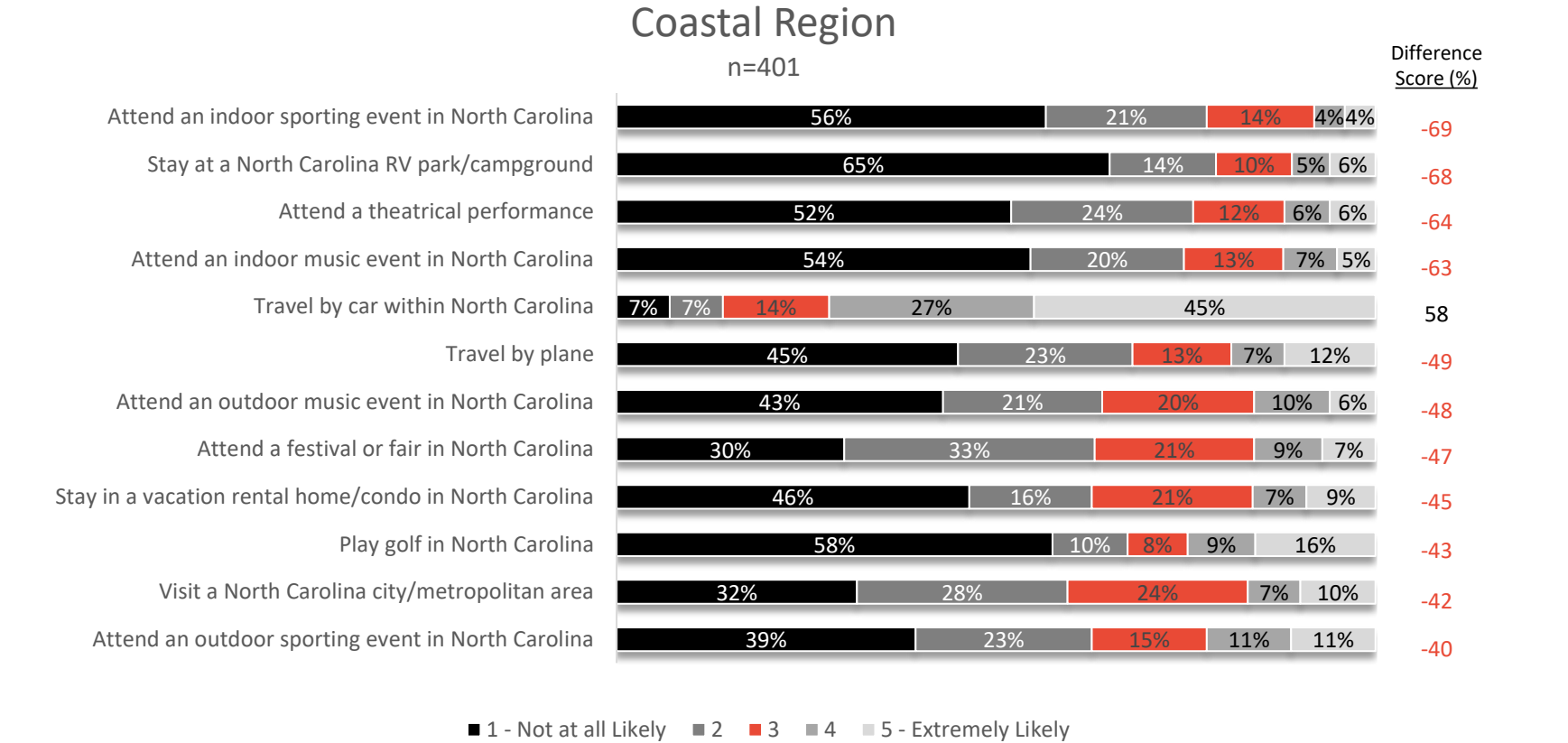
North Carolina

Difference Scores (%)

	<5 Years n=148	5-10 Years n=184	11-20 Years n=234	20+ Years n=255	Born in NC n=389
Stay in a vacation rental home/condo in North Carolina	-25	-48	-13	-17	-28
Visit a North Carolina restaurant	32	35	29	33	5
Visit a North Carolina city/metropolitan area	2	-29	-17	-10	-34
Take more overnight trips within North Carolina	-31	-35	-8	-3	-17
Visit the North Carolina coast	8	6	23	30	9
Visit the North Carolina mountains	13	-15	14	12	11
Stay in a North Carolina hotel or resort	-26	--	11	--	-14
Participate in outdoor activities in North Carolina (hiking, biking, kayaking, etc.)	28	-14	21	-4	-26
Travel by car outside of North Carolina	3	-3	30	20	-12
Visit a North Carolina state park	17	-9	13	9	-5
Take more day trips within North Carolina	9	-7	25	5	-9

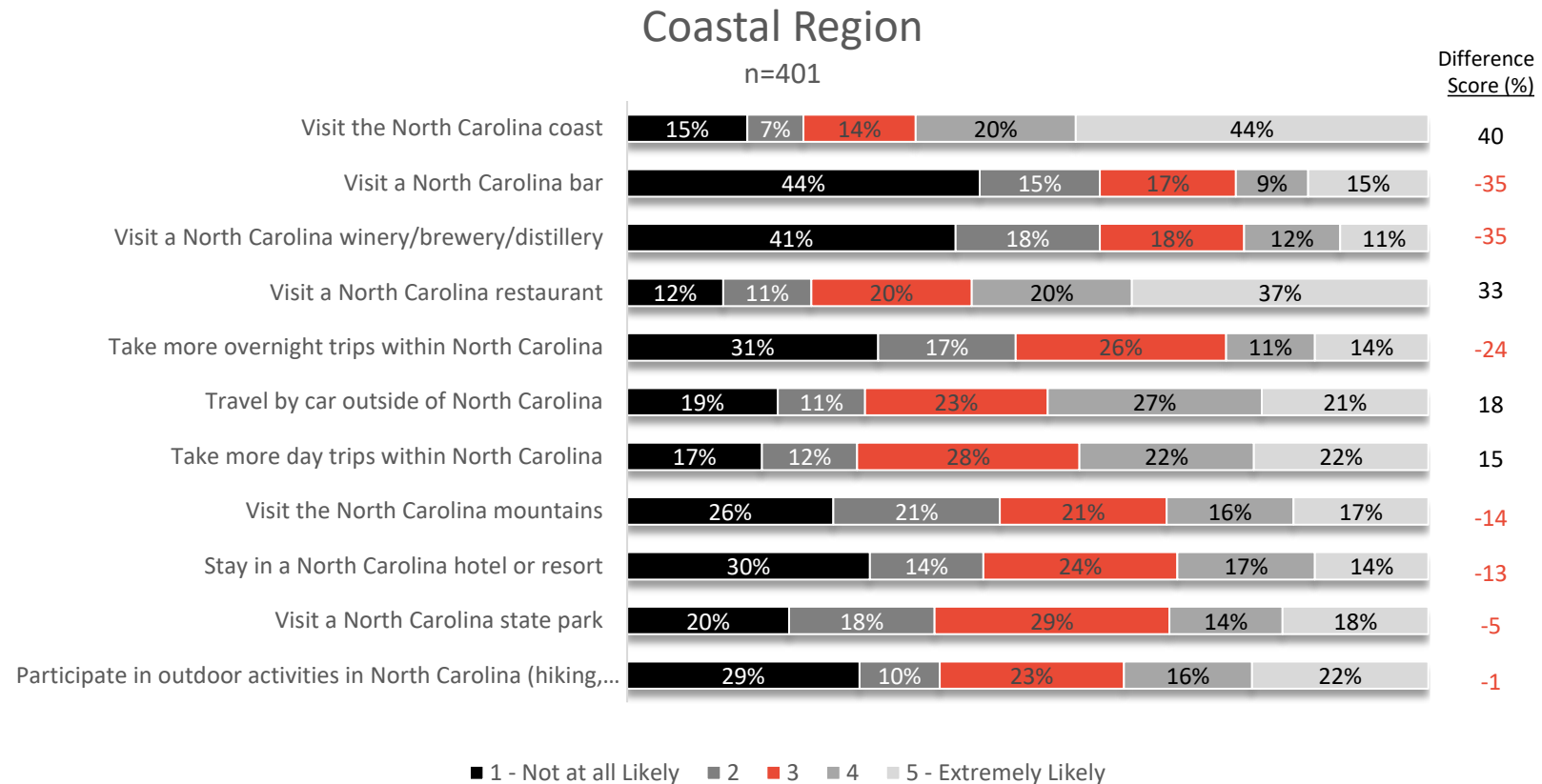
Q5: Using a scale of 1 (not at all likely) to 5 (extremely likely), please indicate how likely you are to engage in each of the following activities during the next 3 months now that the North Carolina COVID-19 restrictions are beginning to ease.

Coastal Residents Plan to Travel by Car Within North Carolina During the Next Three Months



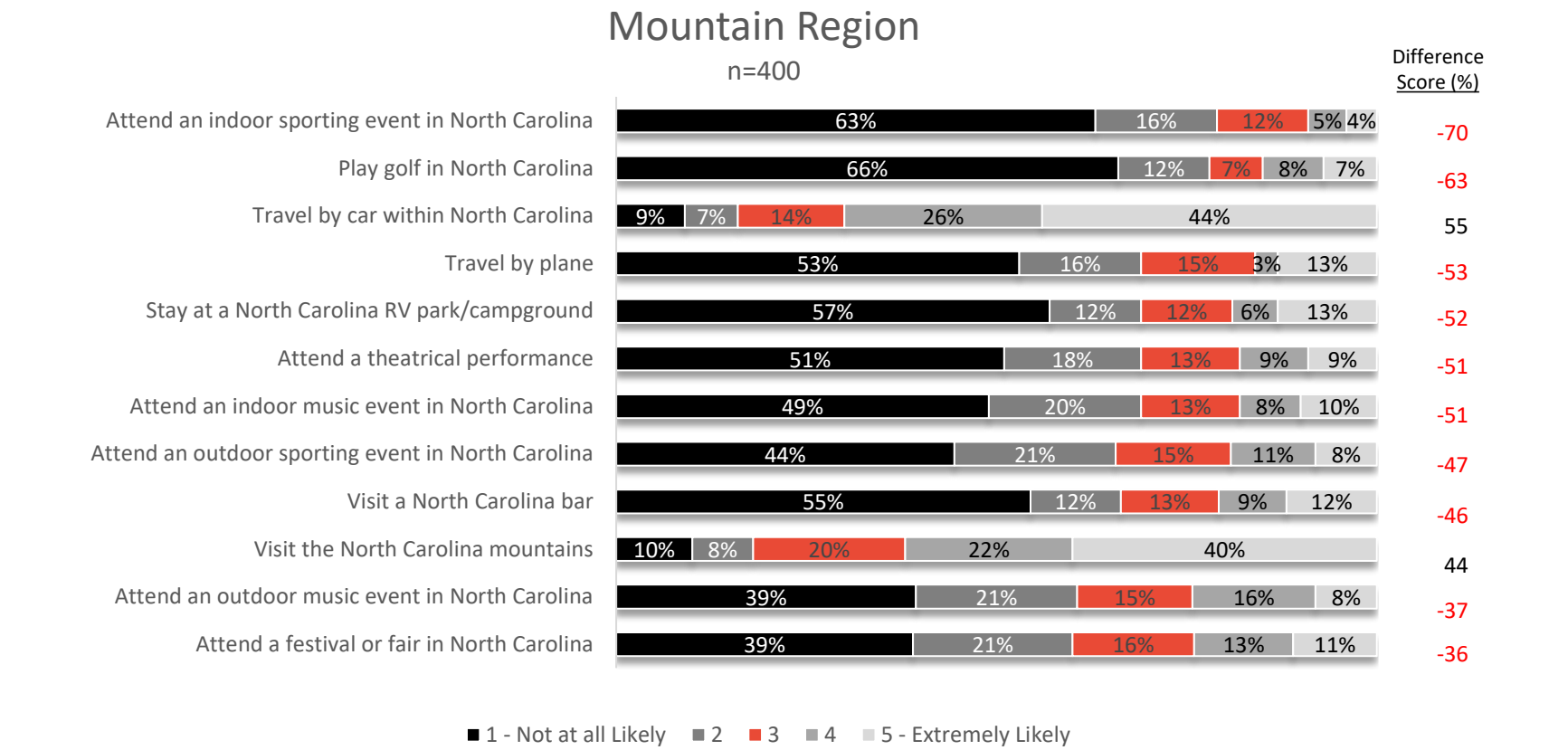
Q5: Using a scale of 1 (not at all likely) to 5 (extremely likely), please indicate how likely you are to engage in each of the following activities during the next 3 months now that the North Carolina COVID-19 restrictions are beginning to ease.

And, Take More Day Trips Within the State and Close to Home



Q5: Using a scale of 1 (not at all likely) to 5 (extremely likely), please indicate how likely you are to engage in each of the following activities during the next 3 months now that the North Carolina COVID-19 restrictions are beginning to ease.

Residents in the Mountain Region are Also Likely to Drive to Destinations Close to Home

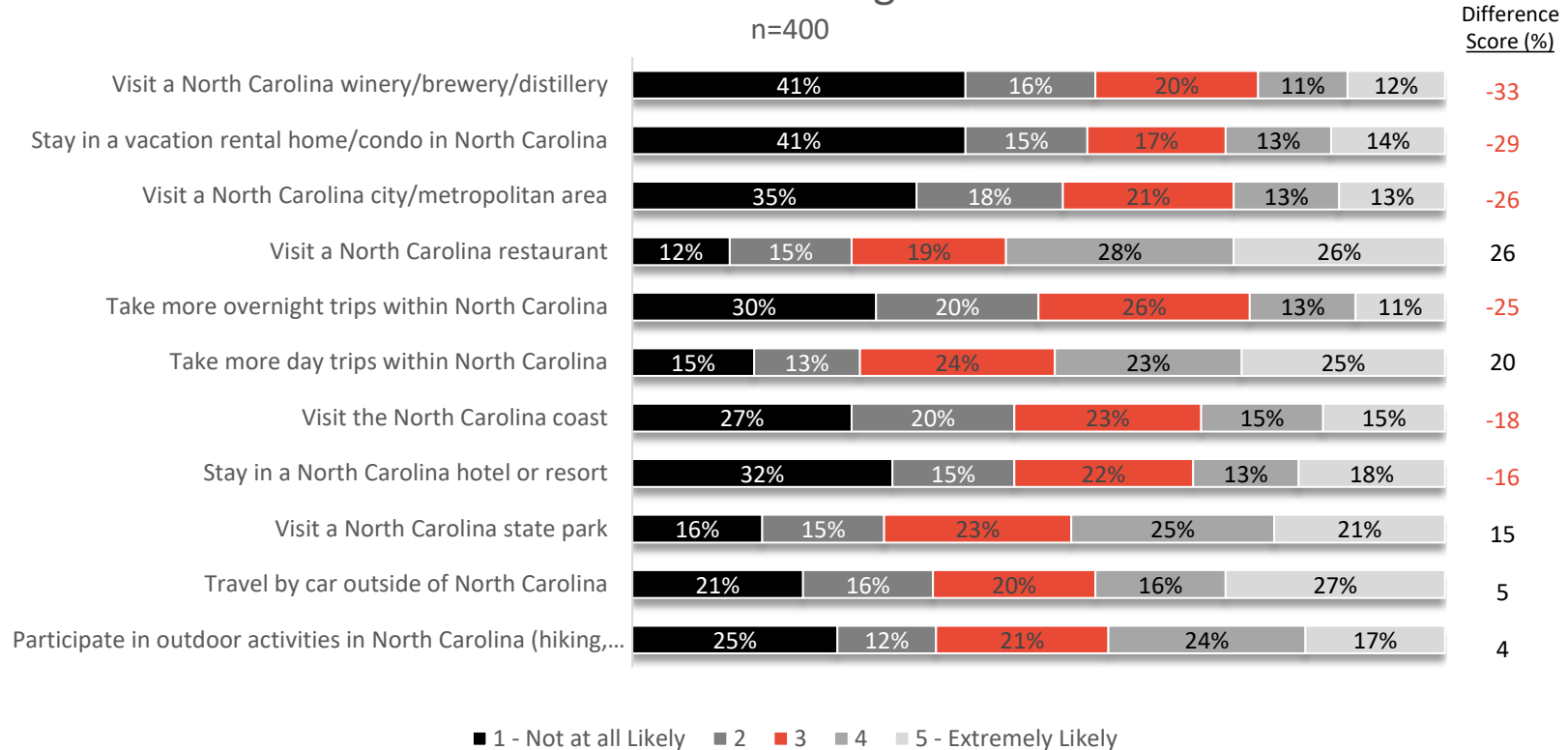


Q5: Using a scale of 1 (not at all likely) to 5 (extremely likely), please indicate how likely you are to engage in each of the following activities during the next 3 months now that the North Carolina COVID-19 restrictions are beginning to ease.

And, They Plan to Take More Day Trips Within the State and Visit Outdoor Destinations

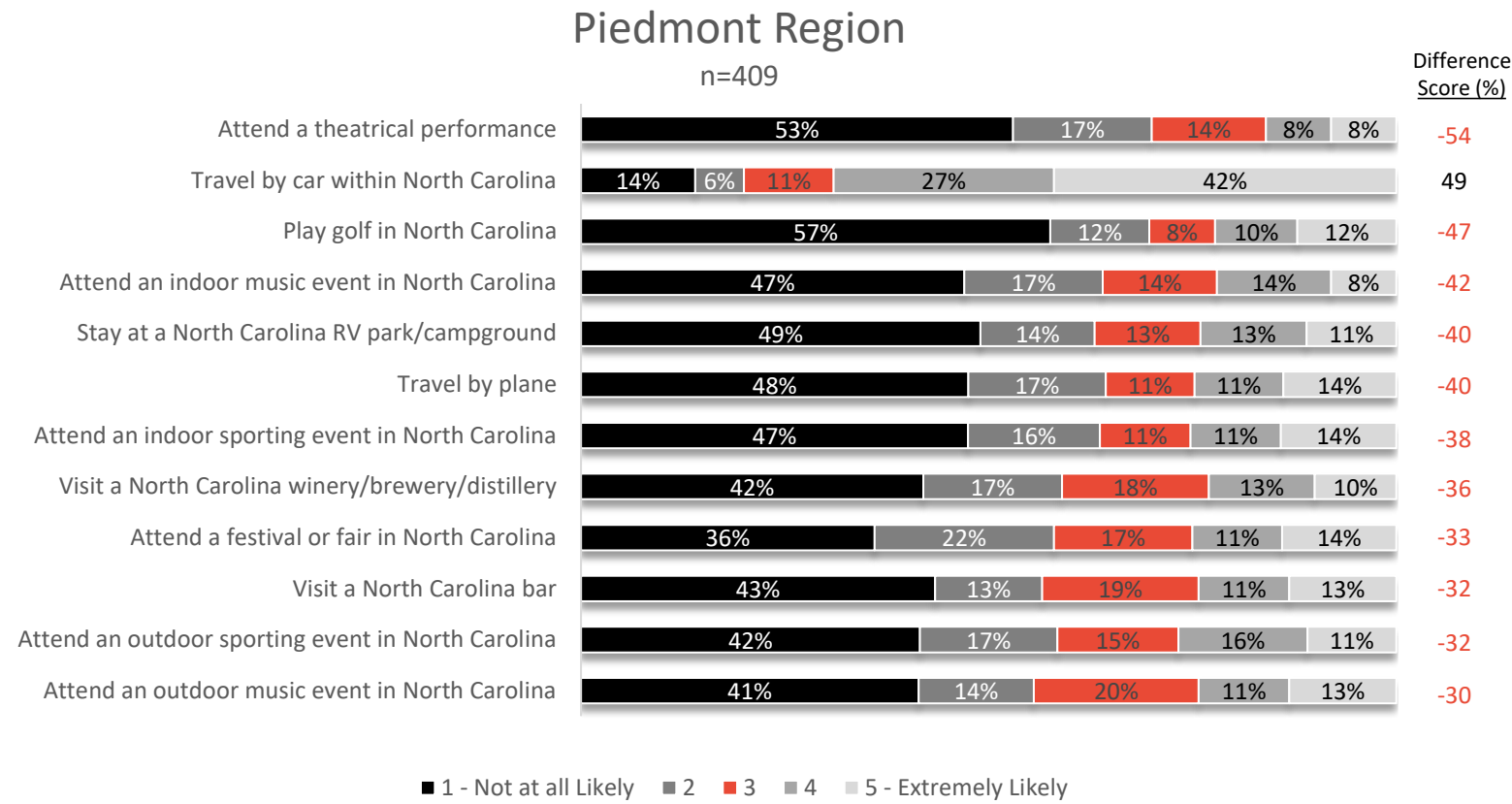
Mountain Region

n=400



Q5: Using a scale of 1 (not at all likely) to 5 (extremely likely), please indicate how likely you are to engage in each of the following activities during the next 3 months now that the North Carolina COVID-19 restrictions are beginning to ease.

Piedmont Residents Plan To Travel by Car Within North Carolina During the Next Three Months

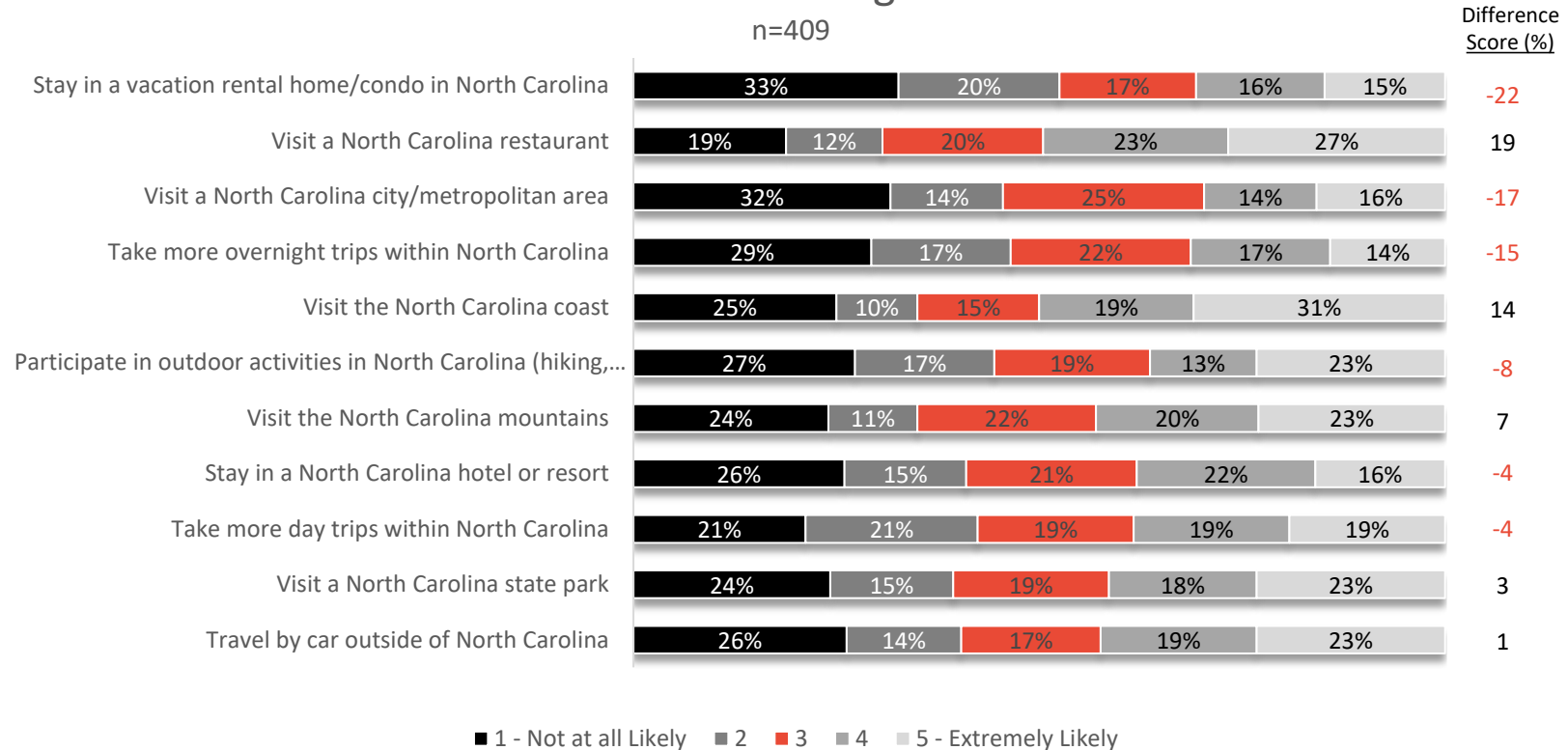


Q5: Using a scale of 1 (not at all likely) to 5 (extremely likely), please indicate how likely you are to engage in each of the following activities during the next 3 months now that the North Carolina COVID-19 restrictions are beginning to ease.

And, They Plan to Visit a North Carolina Restaurant And Visit the Coast

Piedmont Region

n=409

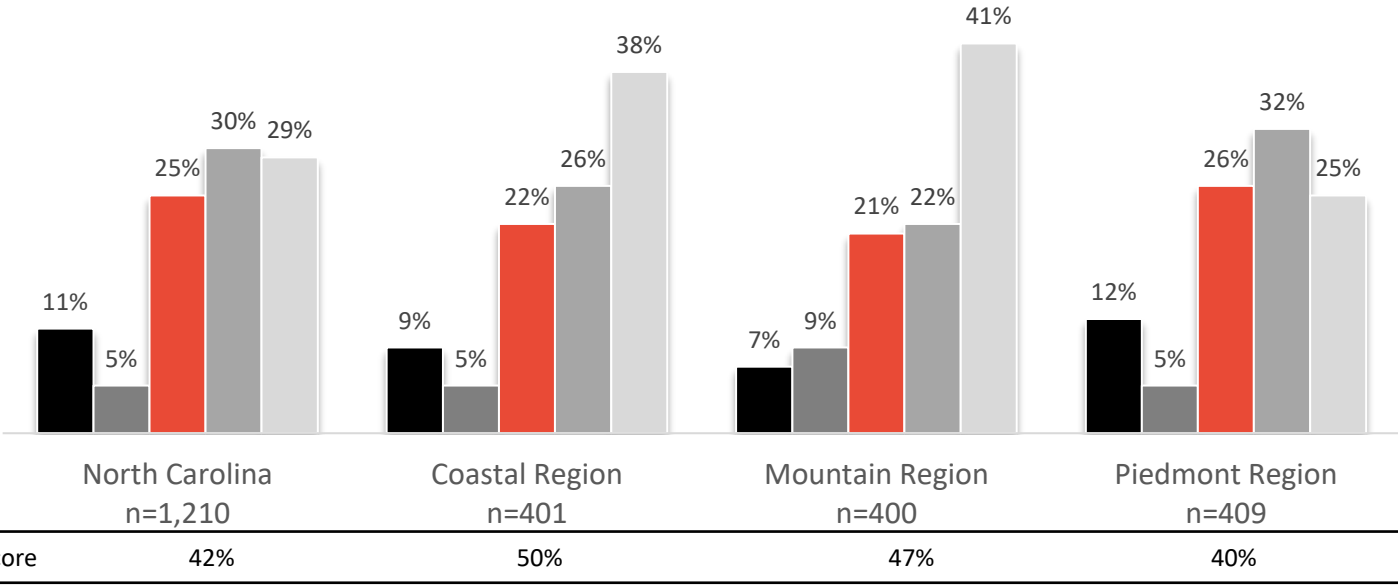


Q5: Using a scale of 1 (not at all likely) to 5 (extremely likely), please indicate how likely you are to engage in each of the following activities during the next 3 months now that the North Carolina COVID-19 restrictions are beginning to ease.

Outdoor

3 in 5 Residents Feel Access to Outdoor Recreation in North Carolina is Important

■ 1 - Not at all Important ■ 2 ■ 3 ■ 4 ■ 5 - Extremely Important

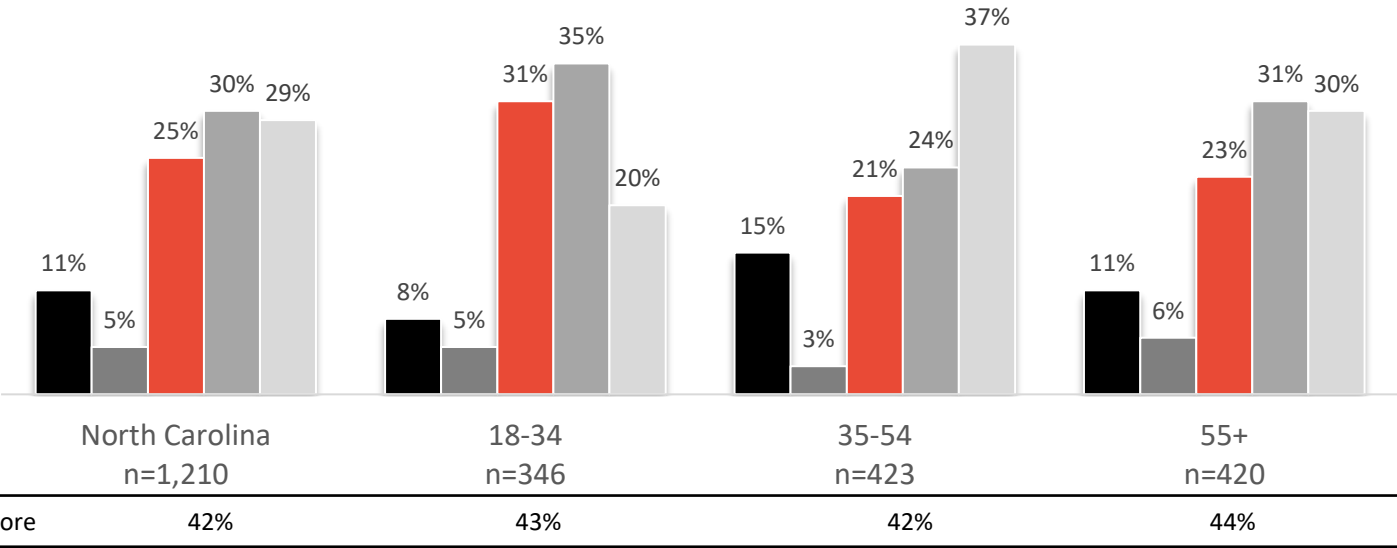


Q6: Using a scale of 1 (not at all important) to 5 (extremely important), how important to you is access to outdoor recreation in North Carolina?

Residents, Regardless of Their Age Feel Similarly About the Importance of Access to Outdoor Recreation in North Carolina

Resident Age

■ 1 - Not at all Important ■ 2 ■ 3 ■ 4 ■ 5 - Extremely Important

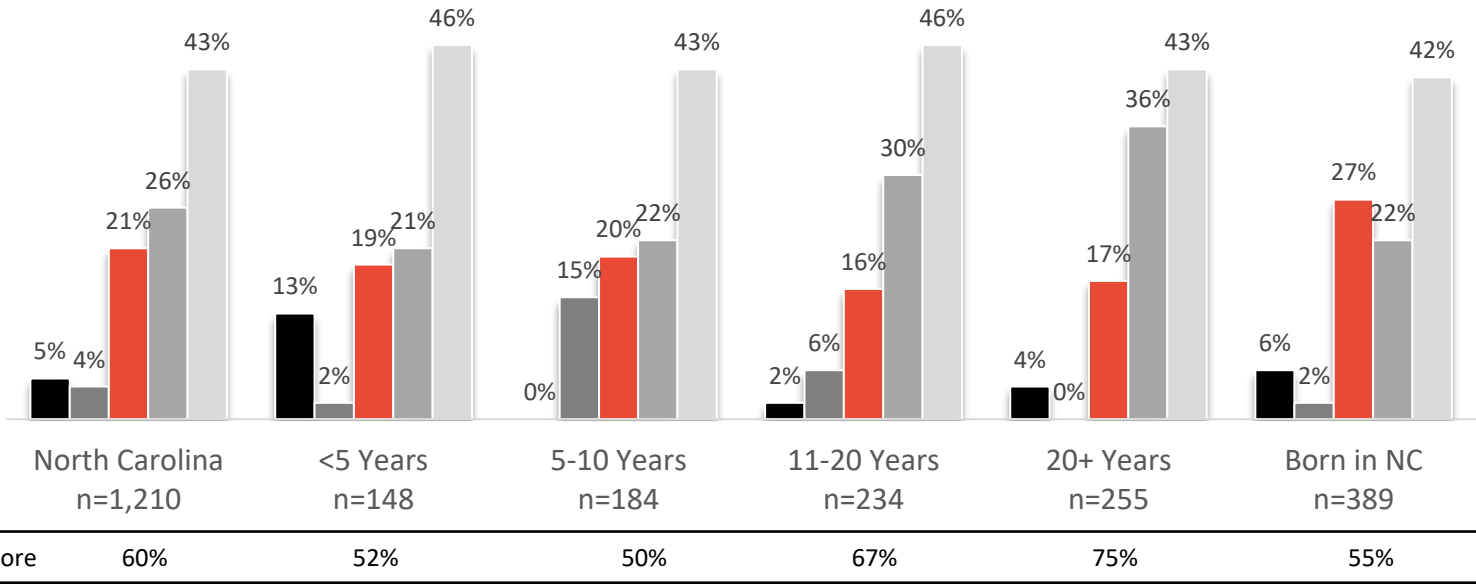


Q6: Using a scale of 1 (not at all important) to 5 (extremely important), how important to you is access to outdoor recreation in North Carolina?

Access to Outdoor Recreation in North Carolina is Most Important to Residents Who Have Lived in the State for 20 Years or More

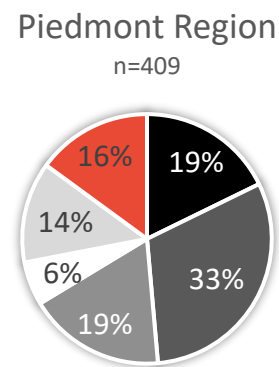
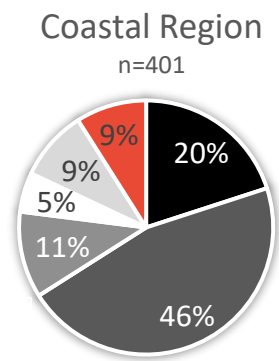
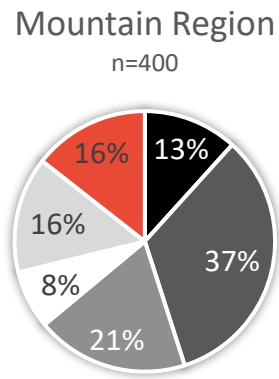
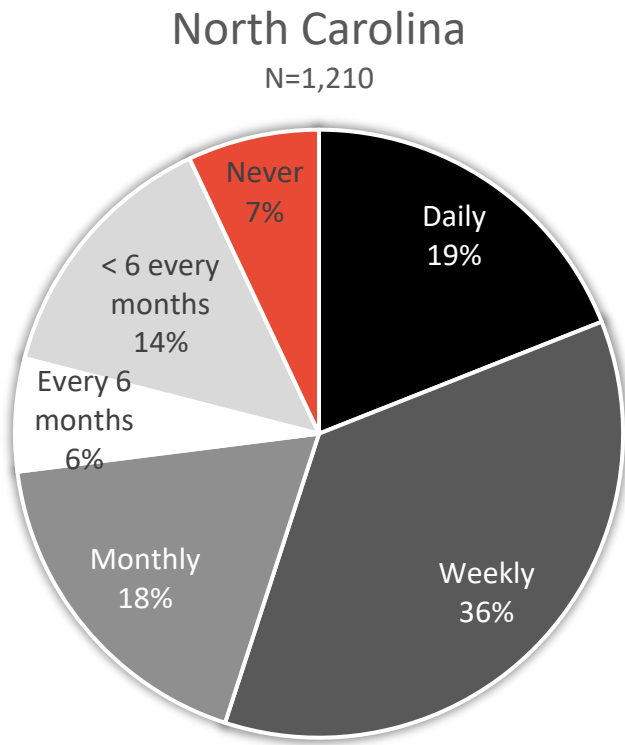
Length of Residency

■ 1 - Not at all Important ■ 2 ■ 3 ■ 4 ■ 5 - Extremely Important



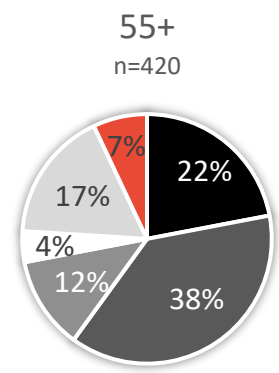
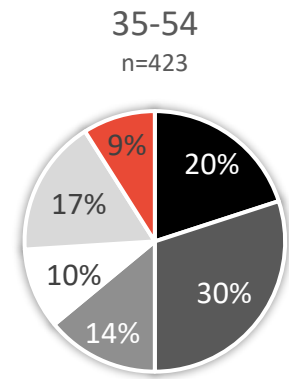
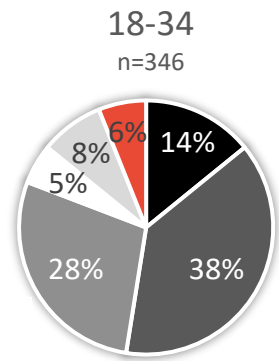
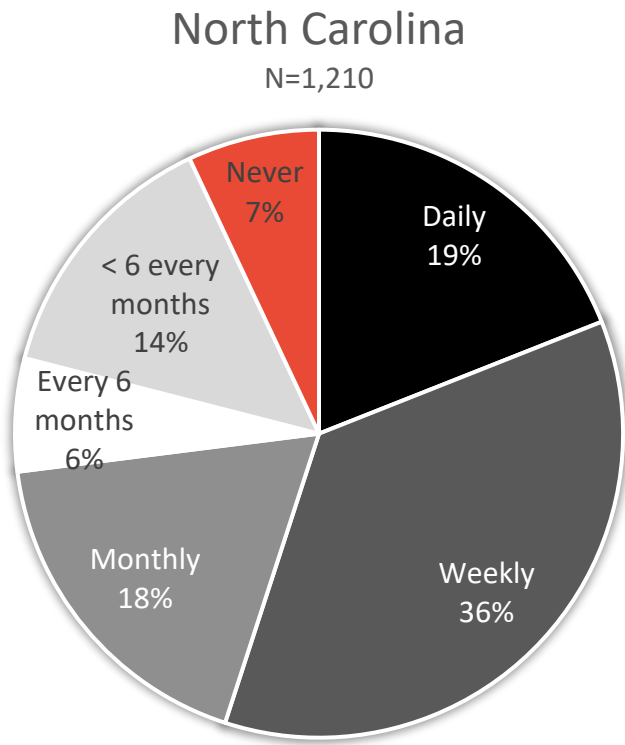
Q6: Using a scale of 1 (not at all important) to 5 (extremely important), how important to you is access to outdoor recreation in North Carolina?

Over Half of North Carolina Residents Participate in Outdoor Recreation Daily or Weekly



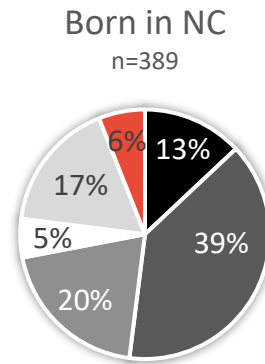
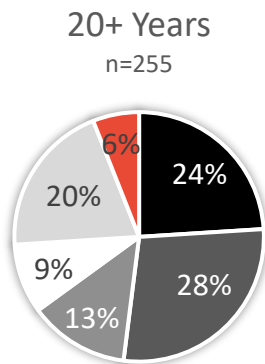
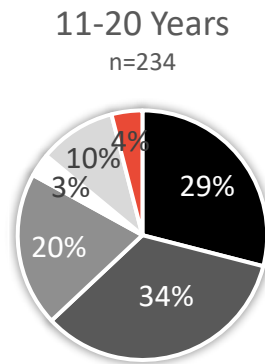
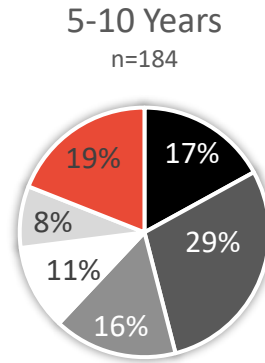
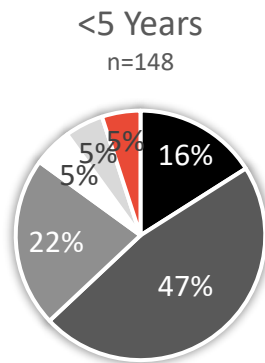
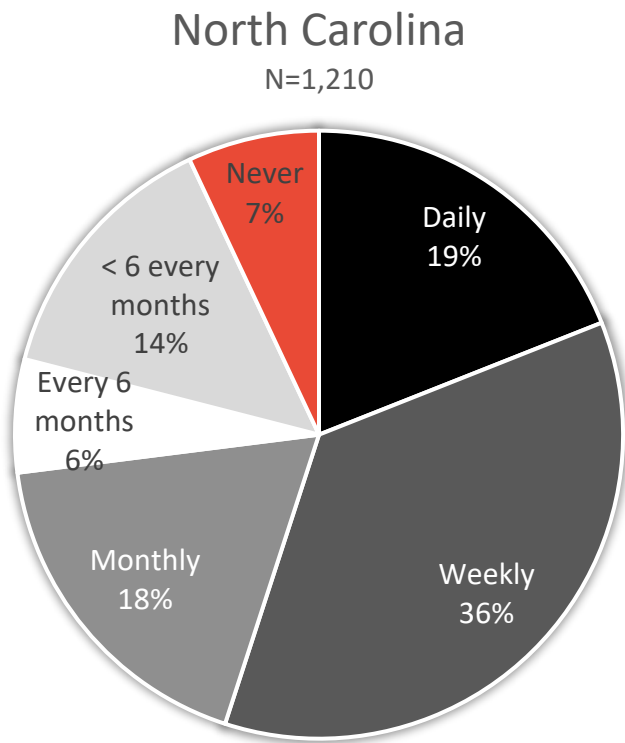
Q7: How often do you participate in outdoor recreation?

Daily Participation in Outdoor Recreation is Greatest Among Older Residents



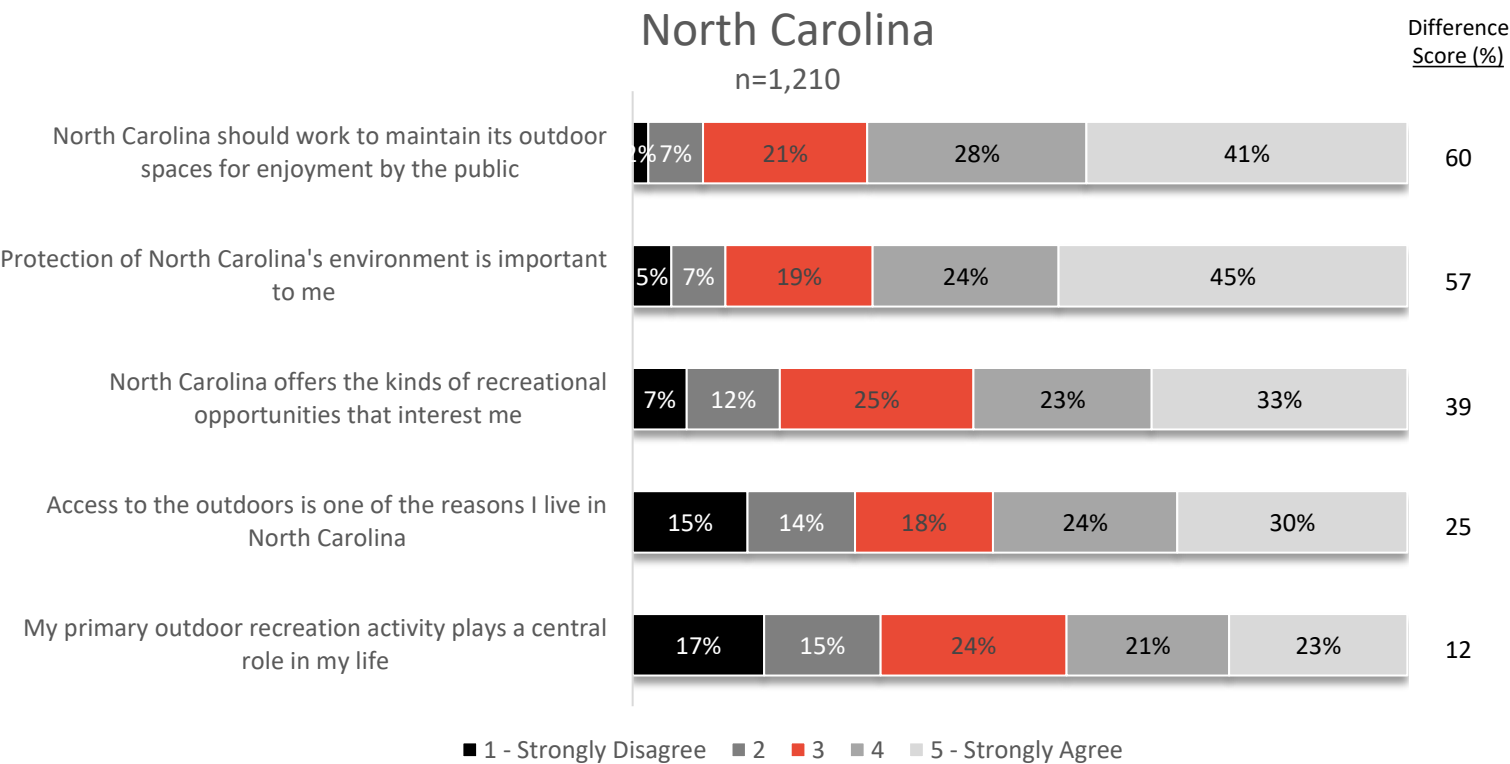
Q7: How often do you participate in outdoor recreation?

Daily Participation in Outdoor Recreation is Greatest Among Those Who Have Lived in the State the Longest



Q7: How often do you participate in outdoor recreation?

North Carolinians Feel Strongly That Outdoor Spaces are Important and That the State Should Maintain Them for Everyone's Enjoyment



Q8: Using a scale of 1 (strongly disagree) to 5 (strongly agree), please indicate your level of agreement with each of the following statements.

Older Residents Feel Stronger About the Importance and Maintenance of North Carolina's Outdoor Spaces Than Younger Residents

North Carolina Difference Scores (%)

	18-34 n=346	35-54 n=423	55+ n=420
North Carolina should work to maintain its outdoor spaces for enjoyment by the public	35	72	72
Protection of North Carolina's environment is important to me	34	58	77
North Carolina offers the kinds of recreational opportunities that interest me	24	29	61
Access to the outdoors is one of the reasons I live in North Carolina	14	12	48
My primary outdoor recreation activity plays a central role in my life	13	-3	25

Q8: Using a scale of 1 (strongly disagree) to 5 (strongly agree), please indicate your level of agreement with each of the following statements.

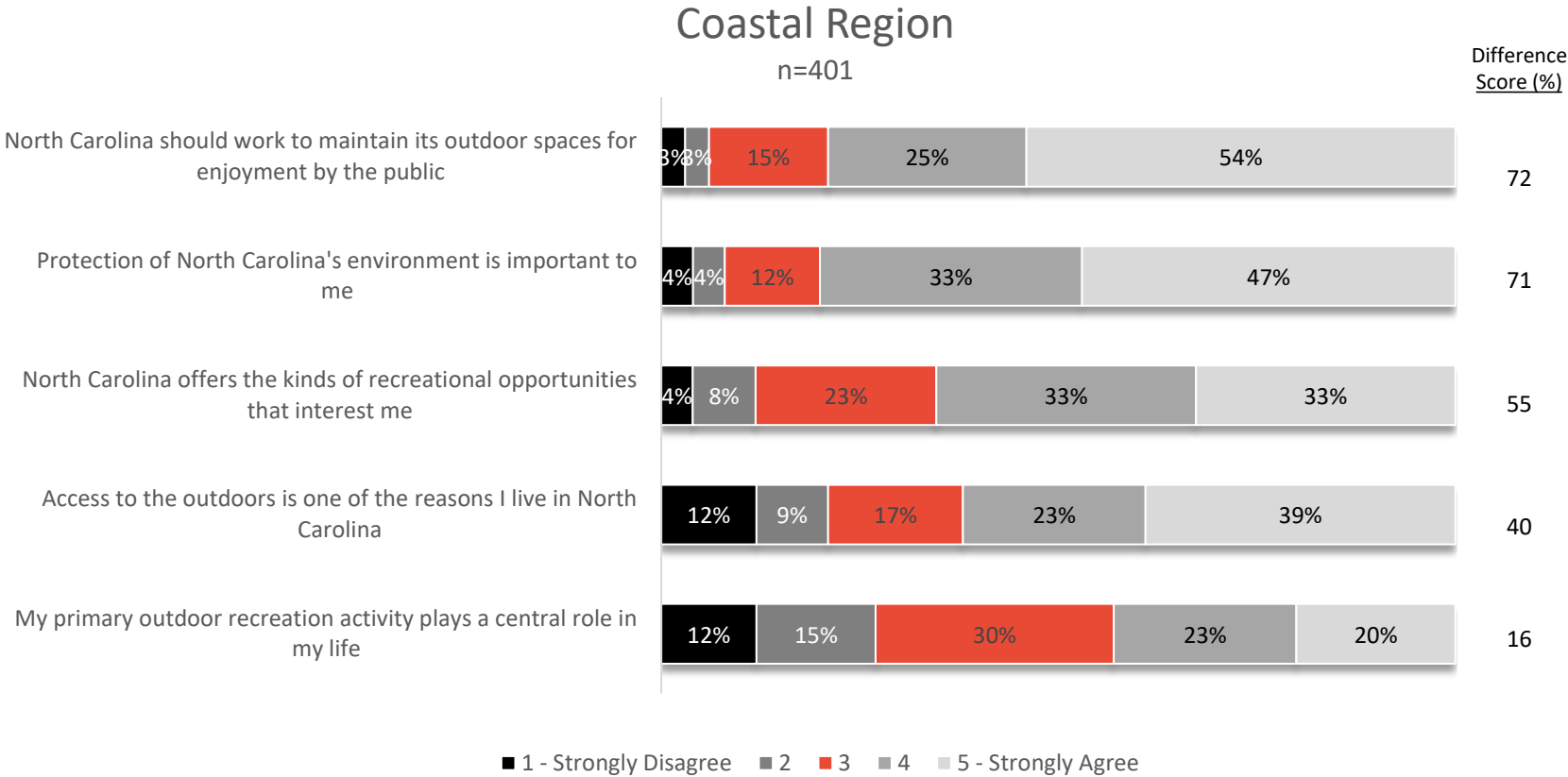
Those Who Have Become Residents in the Past 5 Years Feel the State Offers the Access to Outdoor Activities That Interest Them and is Why They Live Here

North Carolina
Difference Scores (%)

	<5 Years n=148	5-10 Years n=184	11-20 Years n=234	20+ Years n=255	Born in NC n=389
North Carolina should work to maintain its outdoor spaces for enjoyment by the public	52	56	62	51	68
Protection of North Carolina's environment is important to me	44	59	60	49	62
North Carolina offers the kinds of recreational opportunities that interest me	60	3	38	45	42
Access to the outdoors is one of the reasons I live in North Carolina	44	-14	25	20	36
My primary outdoor recreation activity plays a central role in my life	30	-17	25	15	10

Q8: Using a scale of 1 (strongly disagree) to 5 (strongly agree), please indicate your level of agreement with each of the following statements.

Coastal Region Residents Feel Strongly That Outdoor Spaces are Important and That the State Should Maintain Them for Everyone's Enjoyment

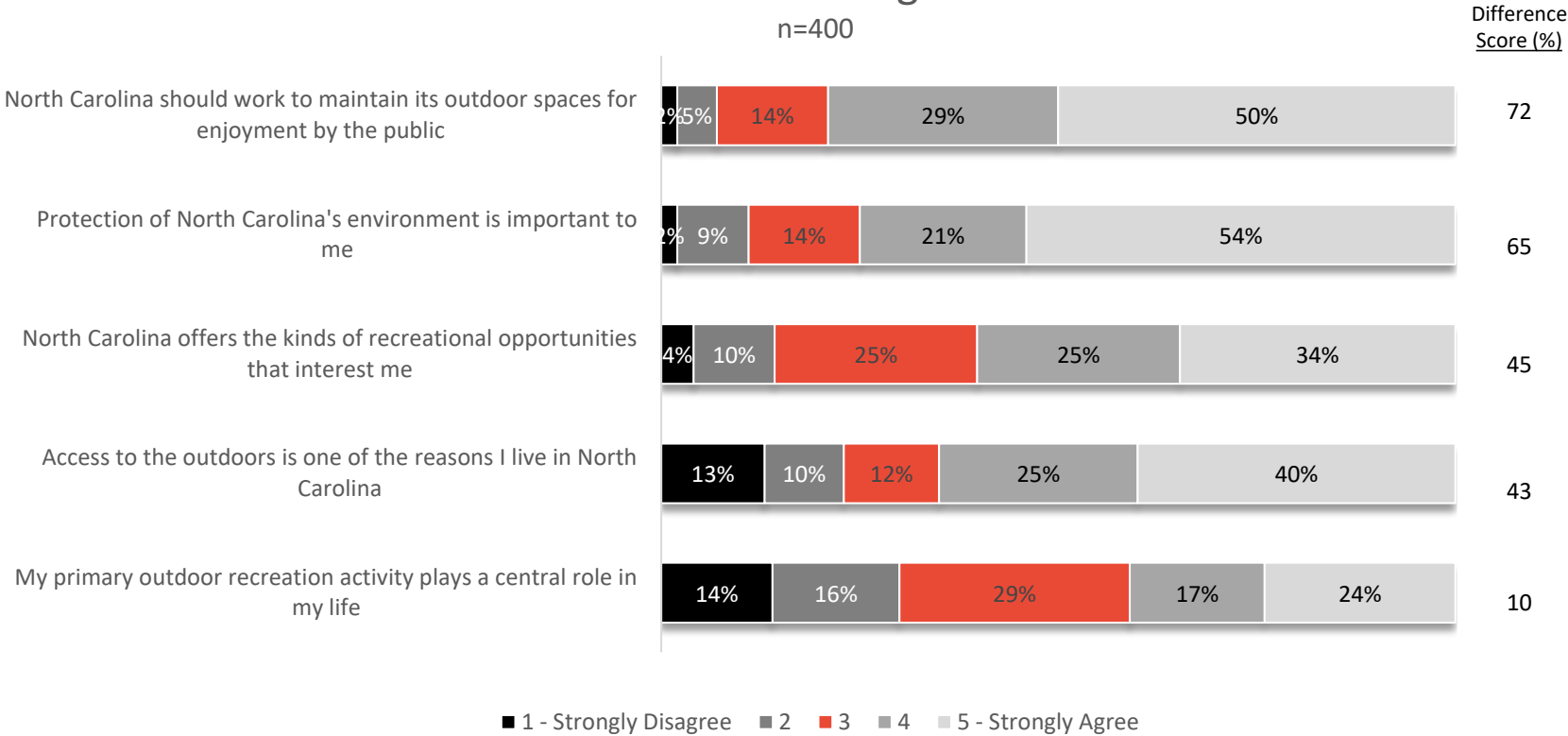


Q8: Using a scale of 1 (strongly disagree) to 5 (strongly agree), please indicate your level of agreement with each of the following statements.

Mountain Region Residents Feel Strongly That Outdoor Spaces are Important and That the State Should Maintain Them for Everyone's Enjoyment

Mountain Region

n=400

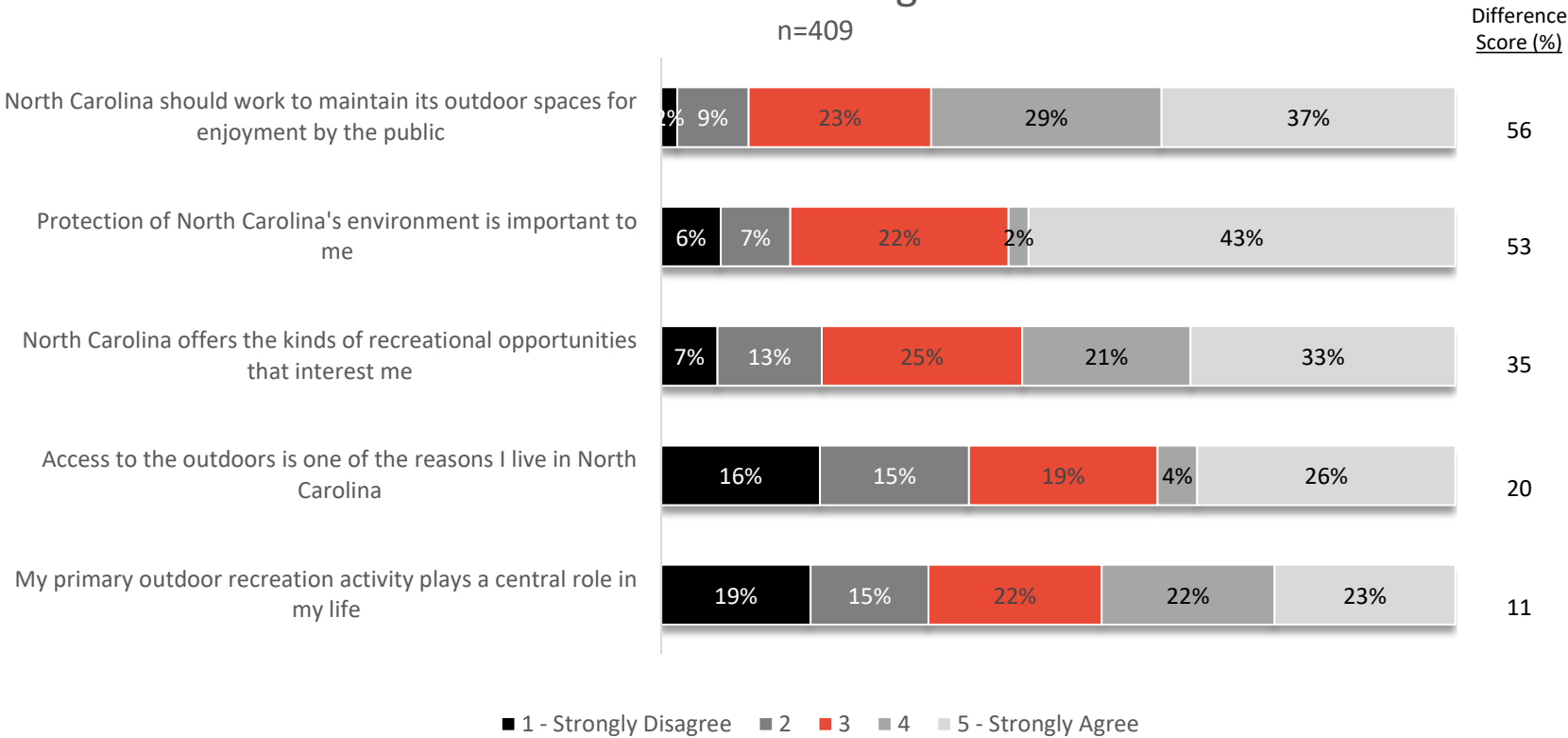


Q8: Using a scale of 1 (strongly disagree) to 5 (strongly agree), please indicate your level of agreement with each of the following statements.

Piedmont Region Residents Feel Strongly That Outdoor Spaces are Important and That the State Should Maintain Them for Everyone's Enjoyment

Piedmont Region

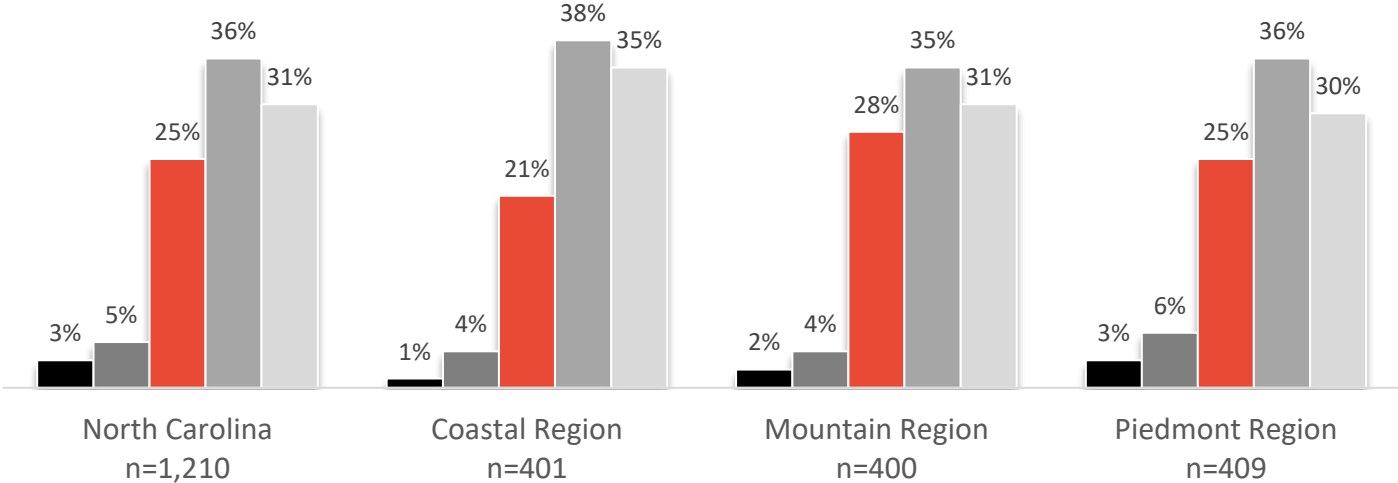
n=409



Q8: Using a scale of 1 (strongly disagree) to 5 (strongly agree), please indicate your level of agreement with each of the following statements.

Two-Thirds of North Carolina Residents are Very Satisfied with Recreational Access in North Carolina

■ 1 - Not at all Satisfied ■ 2 ■ 3 ■ 4 ■ 5 - Extremely Satisfied



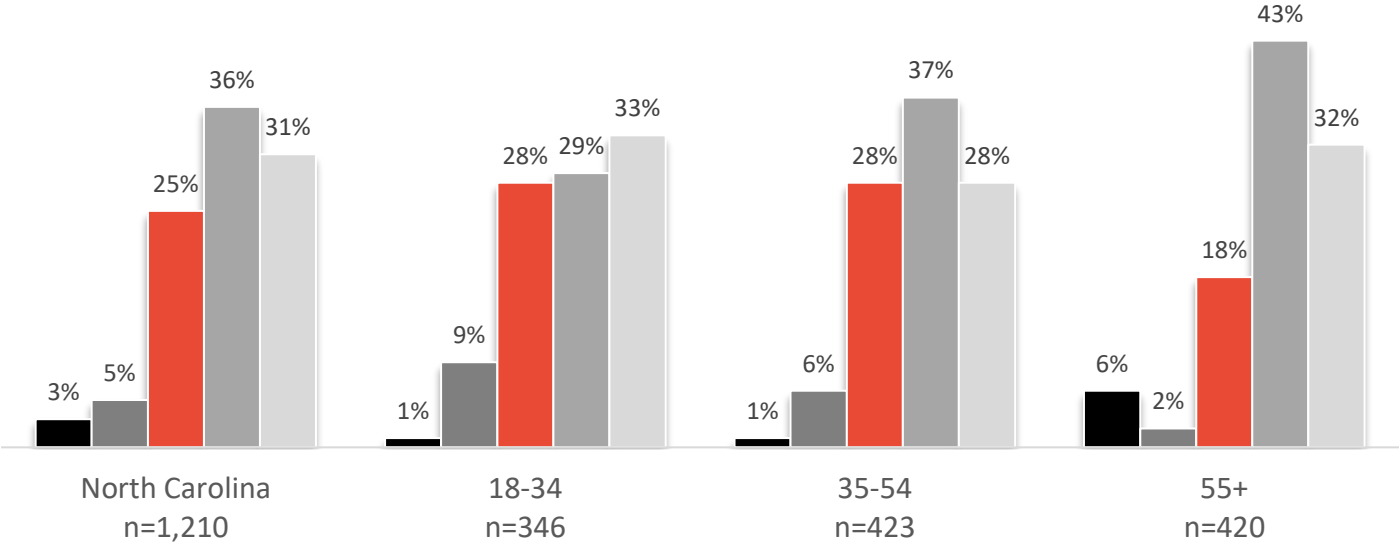
Difference Score	59%	68%	60%	57%
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Q9: Using a scale of 1 (not at all satisfied) to 5 (extremely satisfied), overall, how satisfied are you with the access to recreational opportunities in North Carolina?

Residents, Regardless of Their Age Are Satisfied With the Access to Outdoor Recreational Opportunities in North Carolina

Resident Age

■ 1 - Not at all Important ■ 2 ■ 3 ■ 4 ■ 5 - Extremely Important



Difference Score

59%

52%

58%

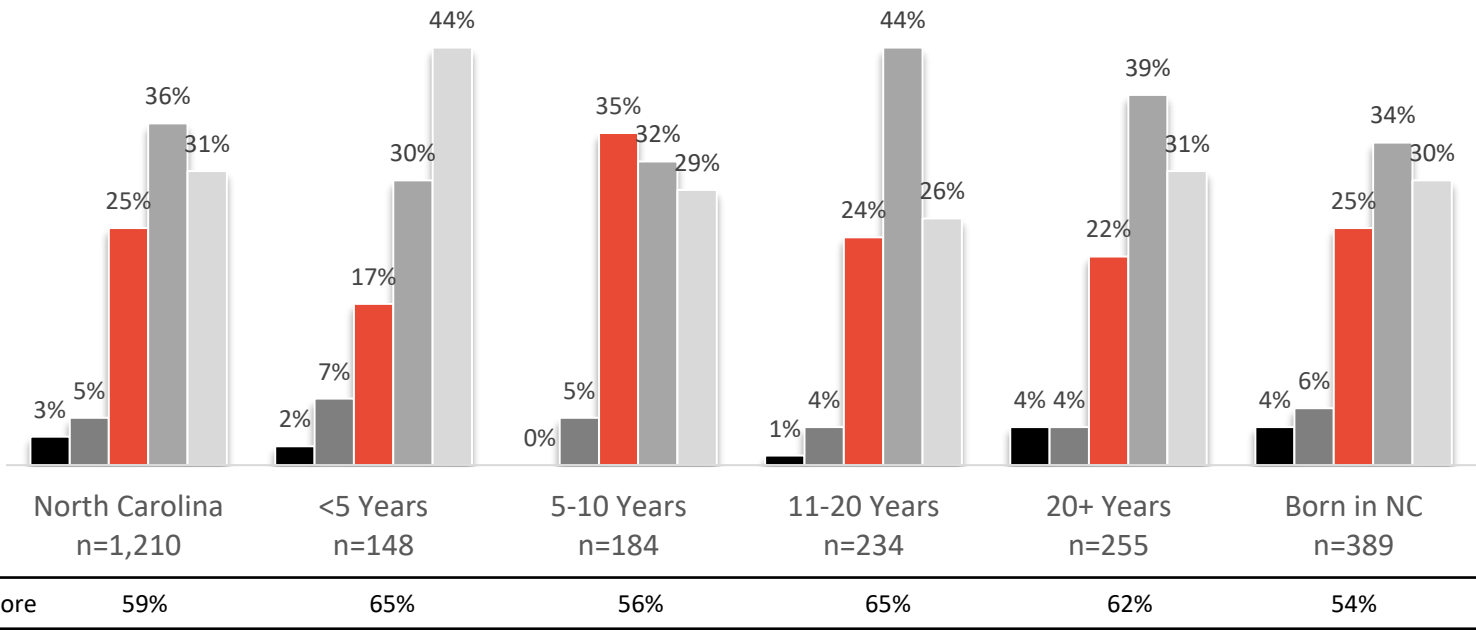
44%

Q9: Using a scale of 1 (not at all satisfied) to 5 (extremely satisfied), overall, how satisfied are you with the access to recreational opportunities in North Carolina?

Residents, Regardless of Their Age are Satisfied With The Access to Outdoor Recreational Opportunities in North Carolina

Length of Residency

■ 1 - Not at all Important ■ 2 ■ 3 ■ 4 ■ 5 - Extremely Important

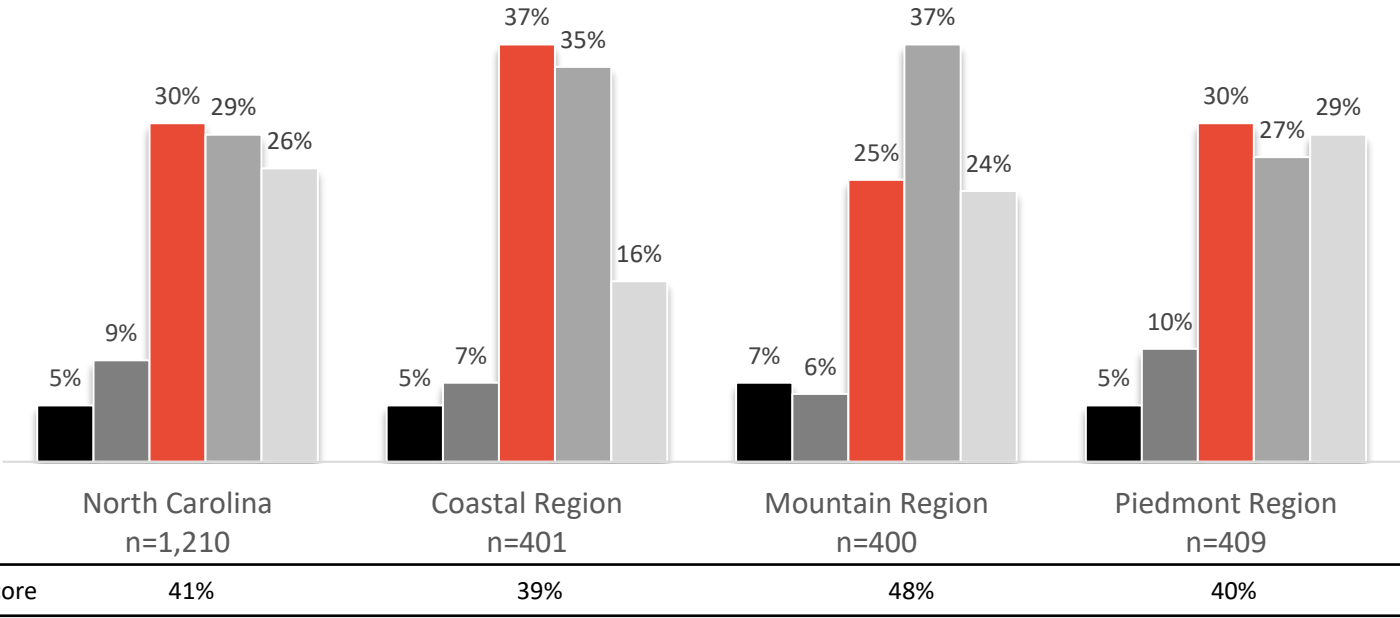


Q9: Using a scale of 1 (not at all satisfied) to 5 (extremely satisfied), overall, how satisfied are you with the access to recreational opportunities in North Carolina?

Sustainability

Community Sustainability Efforts Influence the Destination Choice of More than Half of North Carolinians

■ 1 - Not at all Influential ■ 2 ■ 3 ■ 4 ■ 5 - Extremely Influential

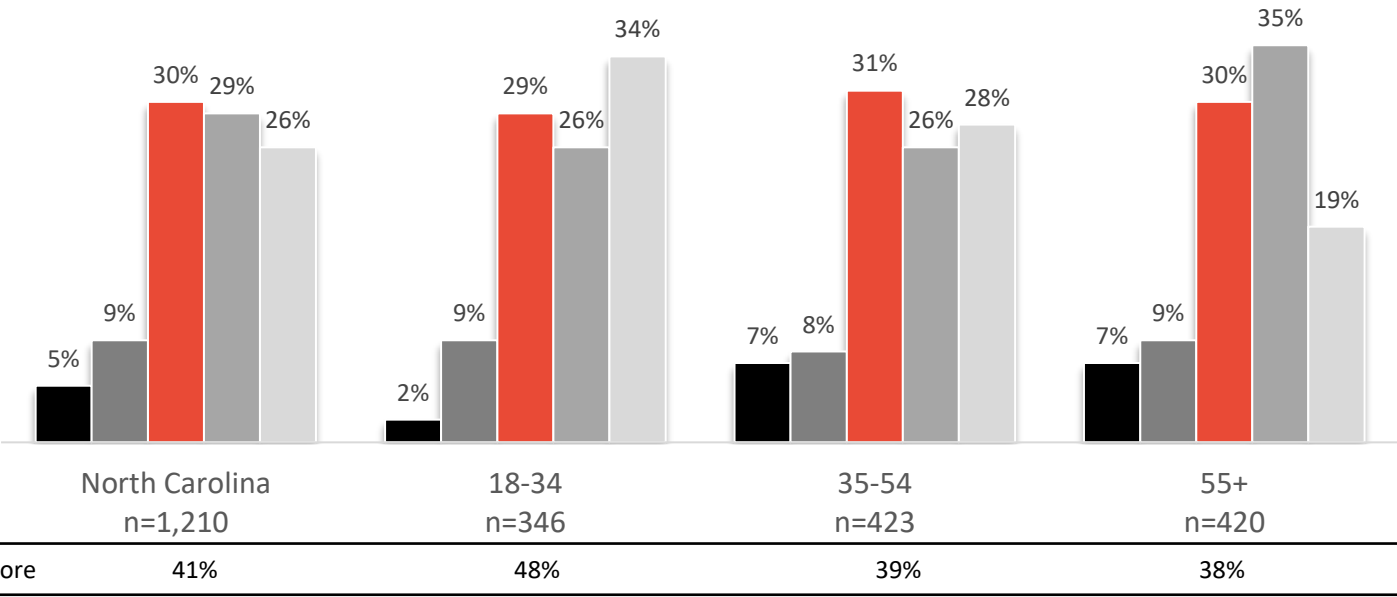


Q10: Using a scale of 1 (not at all influential) to 5 (extremely influential), please indicate how influential state or community efforts to ensure long term sustainability of the natural environment are on your decision in choosing a destination.

In Choosing a Destination, The Youngest North Carolina Residents are the Most Influenced by Community Sustainability Efforts

Resident Age

■ 1 - Not at all Important ■ 2 ■ 3 ■ 4 ■ 5 - Extremely Important

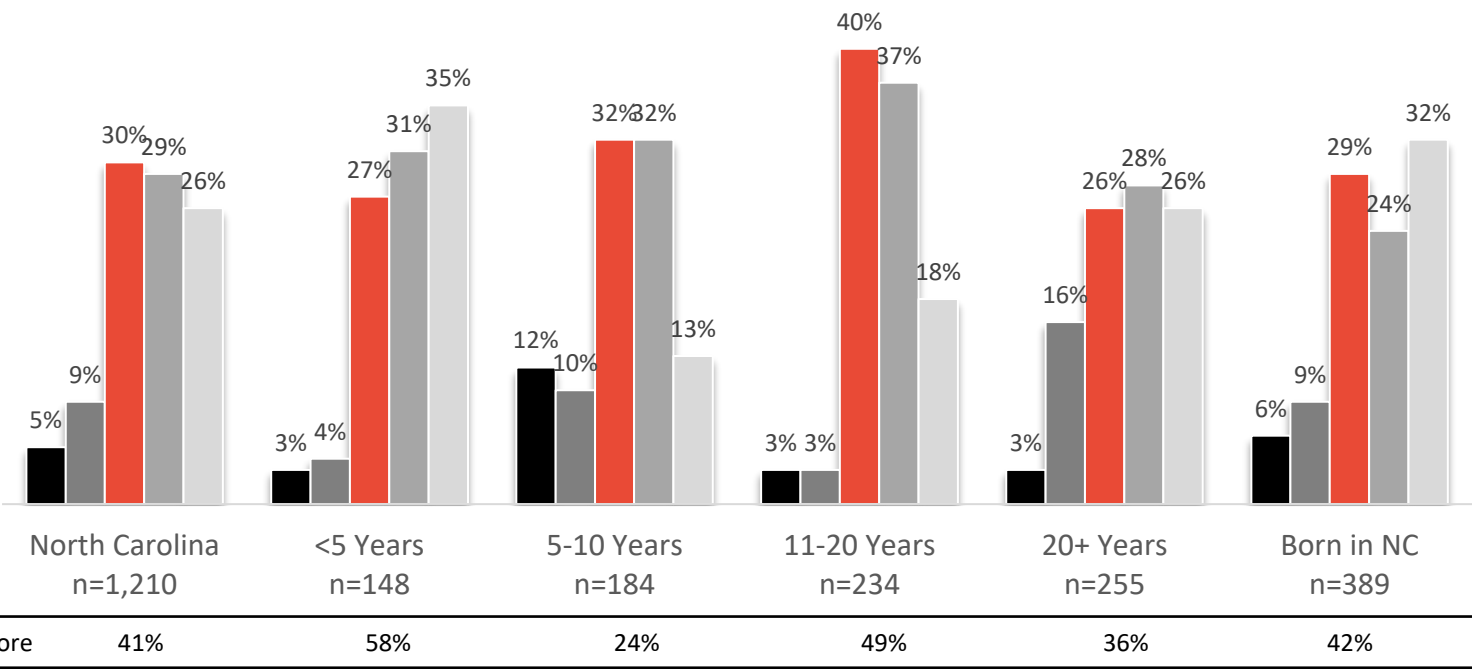


Q10: Using a scale of 1 (not at all influential) to 5 (extremely influential), please indicate how influential state or community efforts to ensure long term sustainability of the natural environment are on your decision in choosing a destination.

When Choosing a Destination, the Newest North Carolina Residents are the Most Influenced by Community Sustainability Efforts

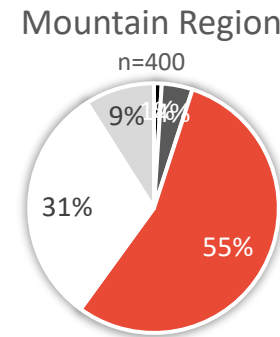
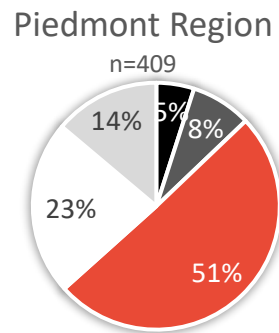
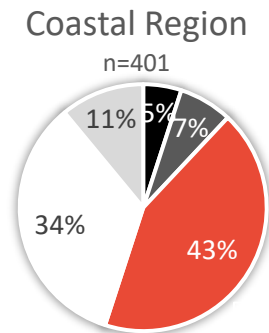
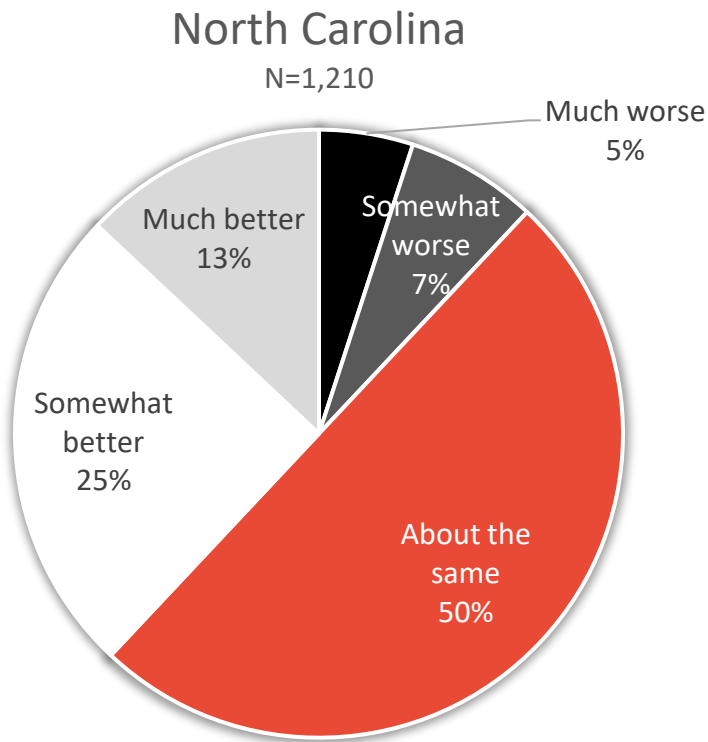
Length of Residency

■ 1 - Not at all Important ■ 2 ■ 3 ■ 4 ■ 5 - Extremely Important



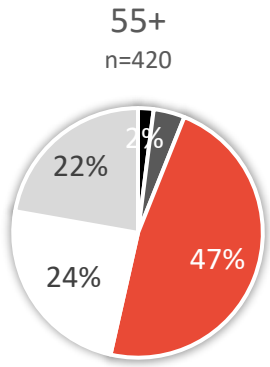
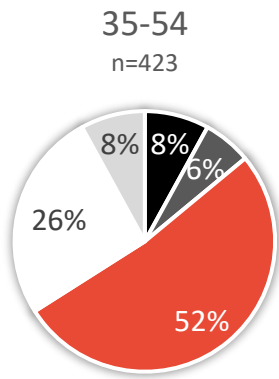
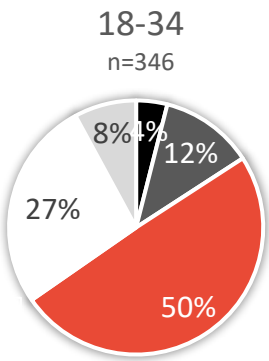
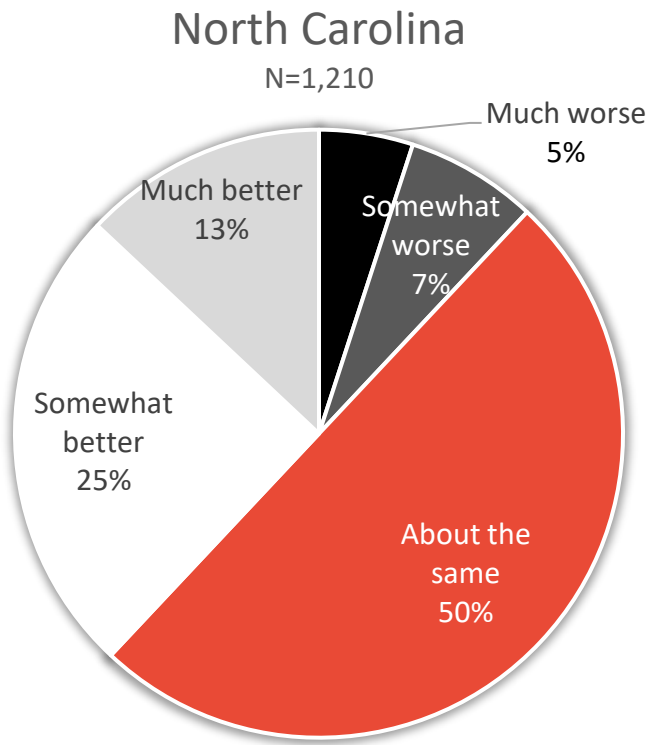
Q10: Using a scale of 1 (not at all influential) to 5 (extremely influential), please indicate how influential state or community efforts to ensure long term sustainability of the natural environment are on your decision in choosing a destination.

2 in 5 Residents Think North Carolina's Sustainability Efforts are Better Than Other States They Have Experienced



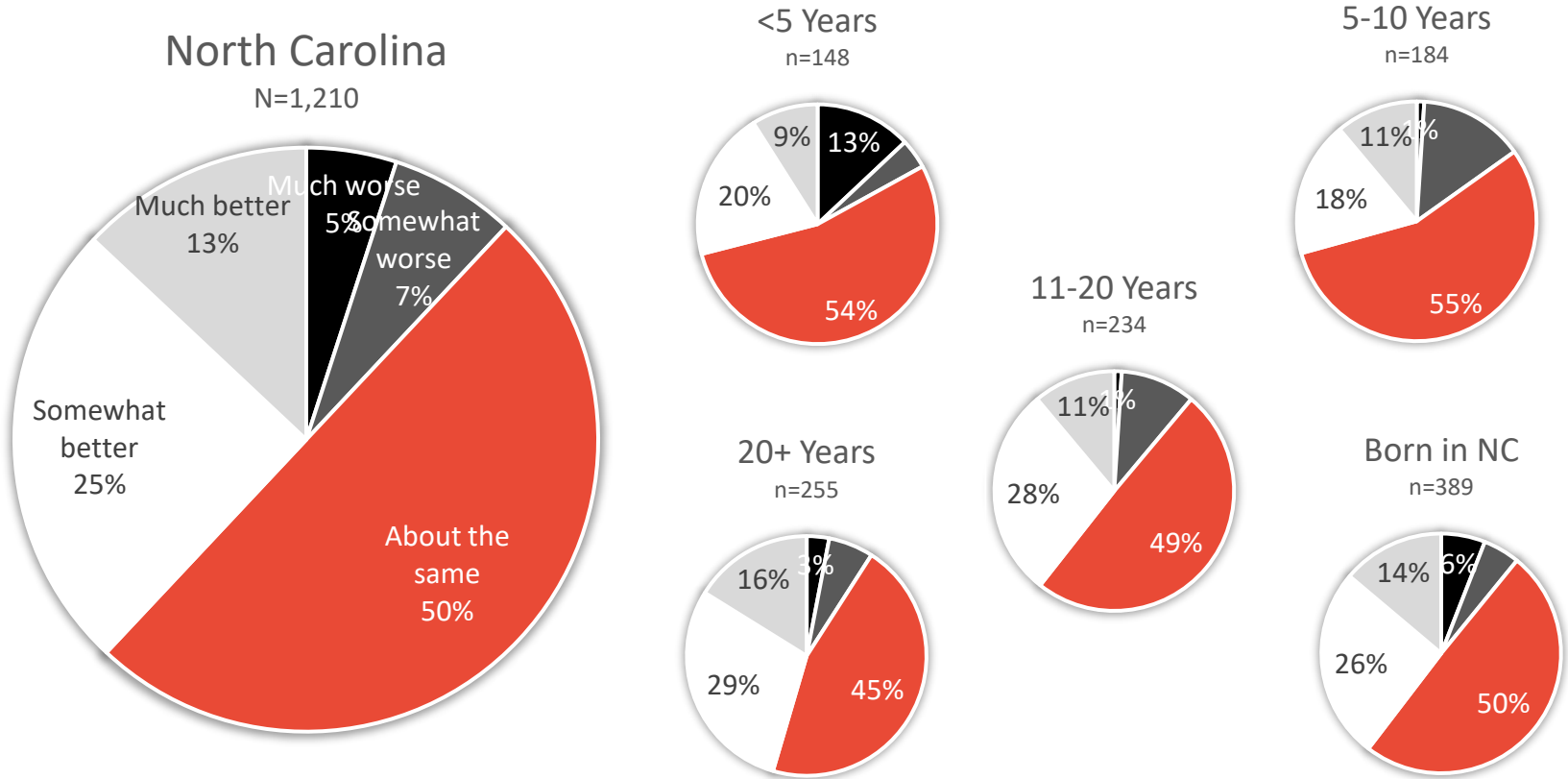
Q11: How would you compare North Carolina to other states you have traveled to regarding North Carolina's efforts to embrace sustainable practices for destinations around the state?

Regardless of Age, Half of North Carolina's Residents Think the State's Sustainability Efforts Are on Par with Other States



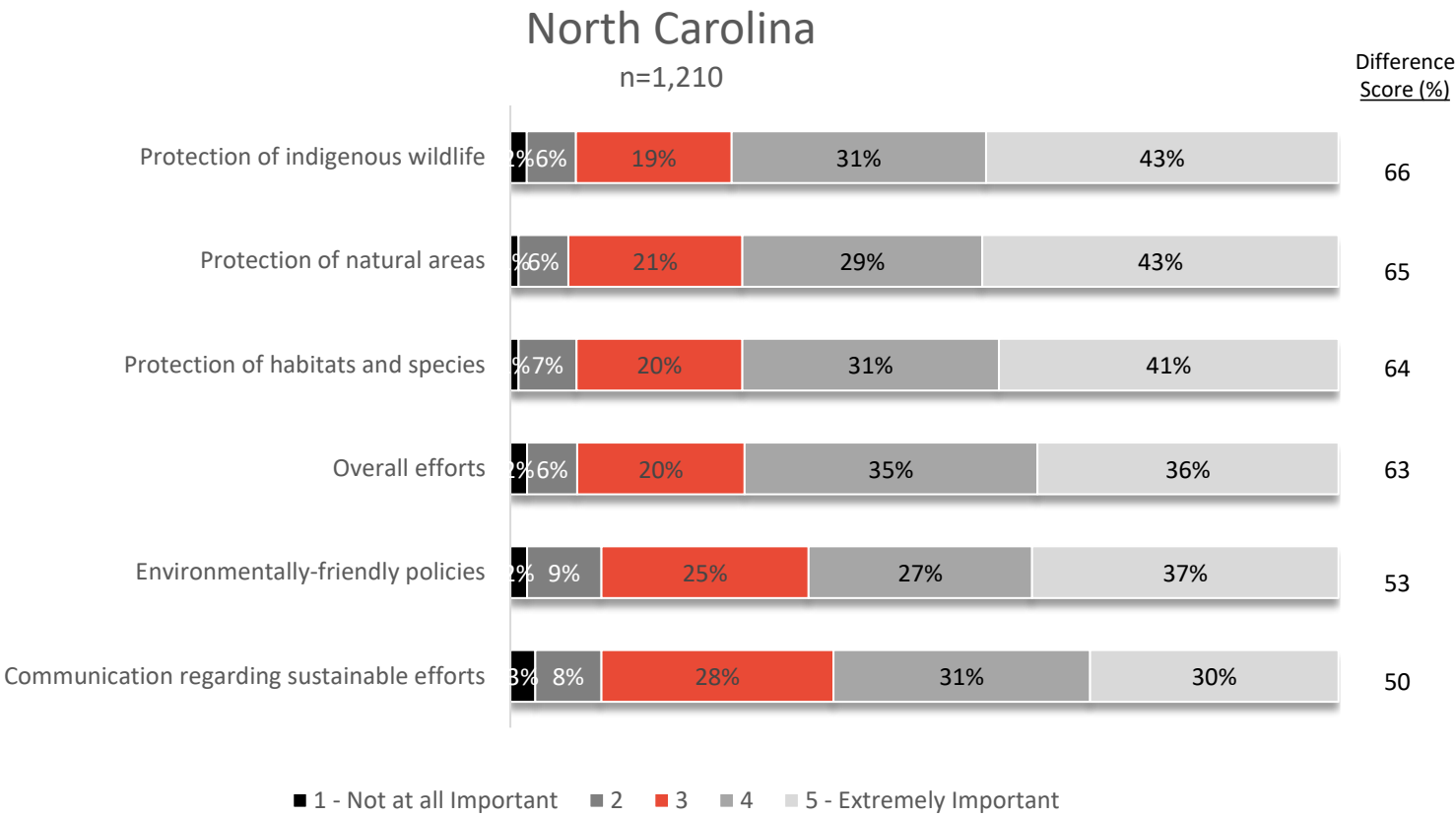
Q11: How would you compare North Carolina to other states you have traveled to regarding North Carolina's efforts to embrace sustainable practices for destinations around the state?

Those Who Have Lived in the State More Than 20 Years Think the Highest of North Carolina's Sustainability Efforts Compared to Other States



Q11: How would you compare North Carolina to other states you have traveled to regarding North Carolina's efforts to embrace sustainable practices for destinations around the state?

North Carolina Residents Think All Sustainability Efforts are Important



Q12: Using a scale of 1 (not at all important) to 5 (extremely important), please indicate how important you think each of the following sustainability efforts is for North Carolina.

While All North Carolinians Think Sustainability Efforts are Important, Younger Residents Put Less Importance on Them Than Older Residents Do

North Carolina

Difference Scores (%)

	18-34 n=346	35-54 n=423	55+ n=420
Protection of indigenous wildlife	58	64	77
Protection of natural areas	41	70	81
Protection of habitats and species	42	69	78
Overall efforts	57	63	69
Environmentally-friendly policies	44	62	53
Communication regarding sustainable efforts	54	49	48

Q12: Using a scale of 1 (not at all important) to 5 (extremely important), please indicate how important you think each of the following sustainability efforts is for North Carolina.

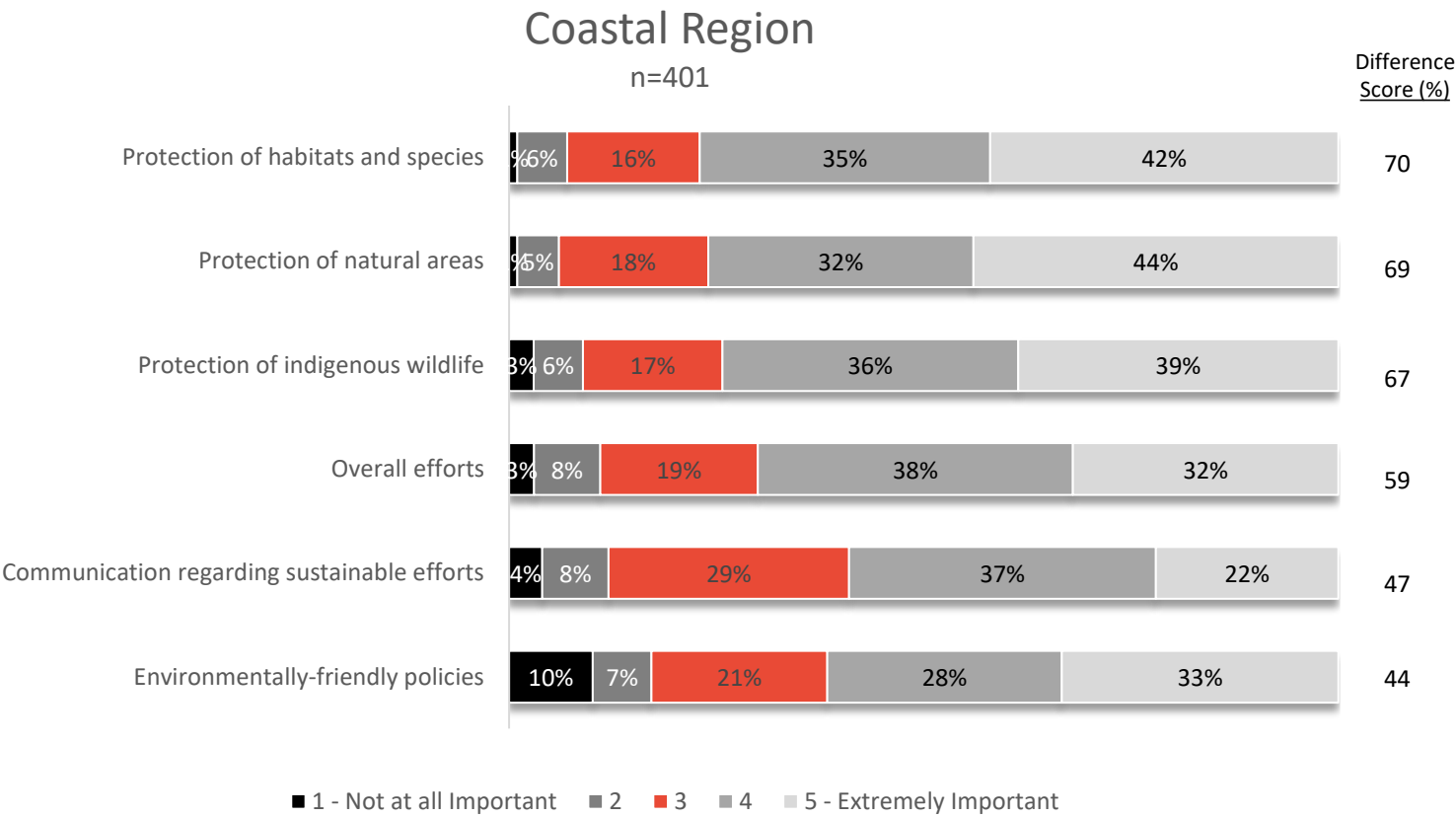
Those Living in the North Carolina 11 or More Years View Sustainability Efforts More Important Than do Shorter Term Residents

North Carolina
Difference Scores (%)

	<5 Years n=148	5-10 Years n=184	11-20 Years n=234	20+ Years n=255	Born in NC n=389
Protection of indigenous wildlife	53	59	68	71	70
Protection of natural areas	44	57	69	63	73
Protection of habitats and species	61	58	71	62	65
Overall efforts	58	58	62	71	62
Environmentally-friendly policies	51	57	69	51	47
Communication regarding sustainable efforts	42	60	43	53	49

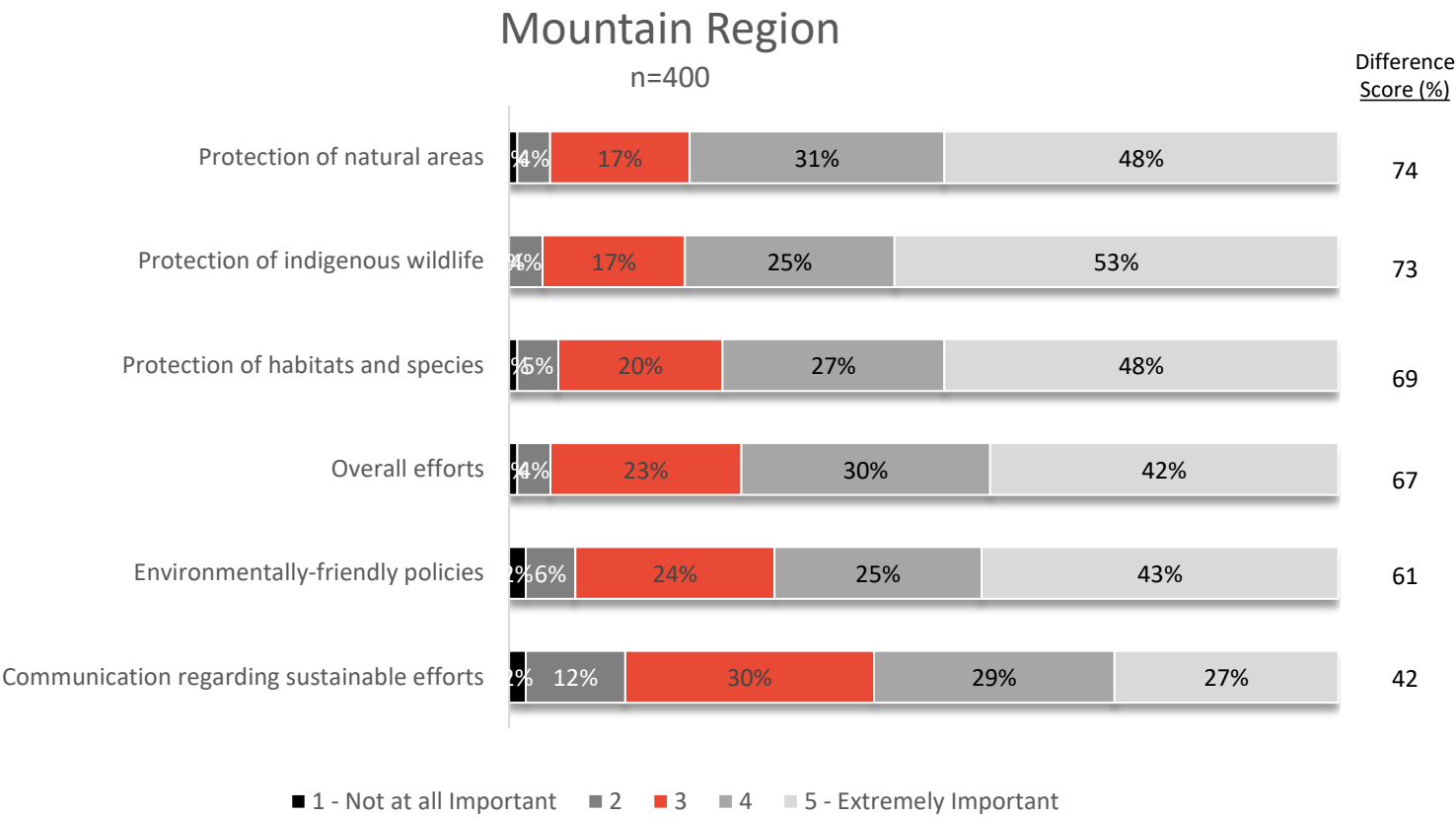
Q12: Using a scale of 1 (not at all important) to 5 (extremely important), please indicate how important you think each of the following sustainability efforts is for North Carolina.

Protection of Habitats, Wildlife and Natural Areas are Most Important to Coastal Region Residents



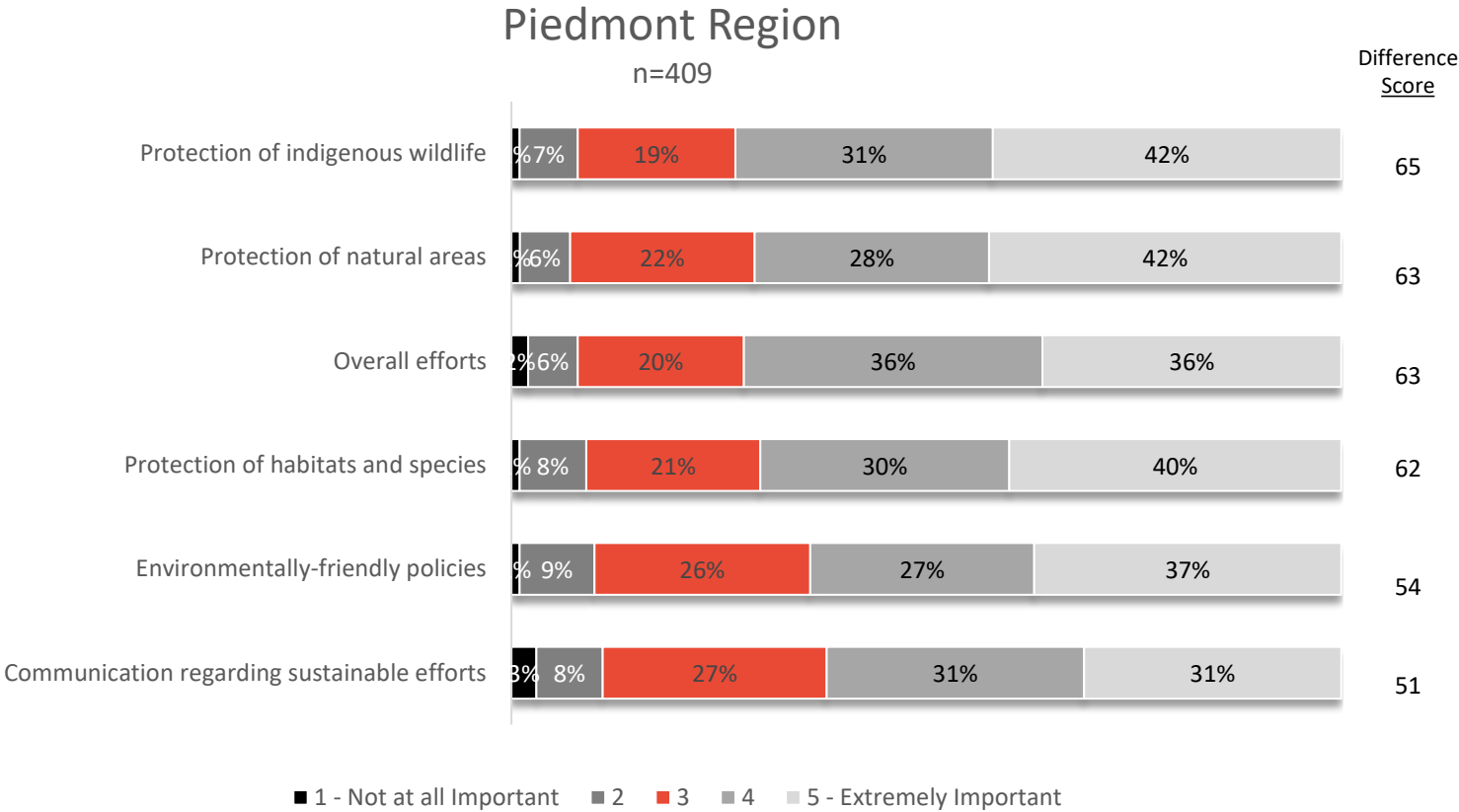
Q12: Using a scale of 1 (not at all important) to 5 (extremely important), please indicate how important you think each of the following sustainability efforts is for North Carolina.

Mountain Region Residents Feel the Protection of Natural Areas and Wildlife are the Most Important Sustainability Efforts for North Carolina



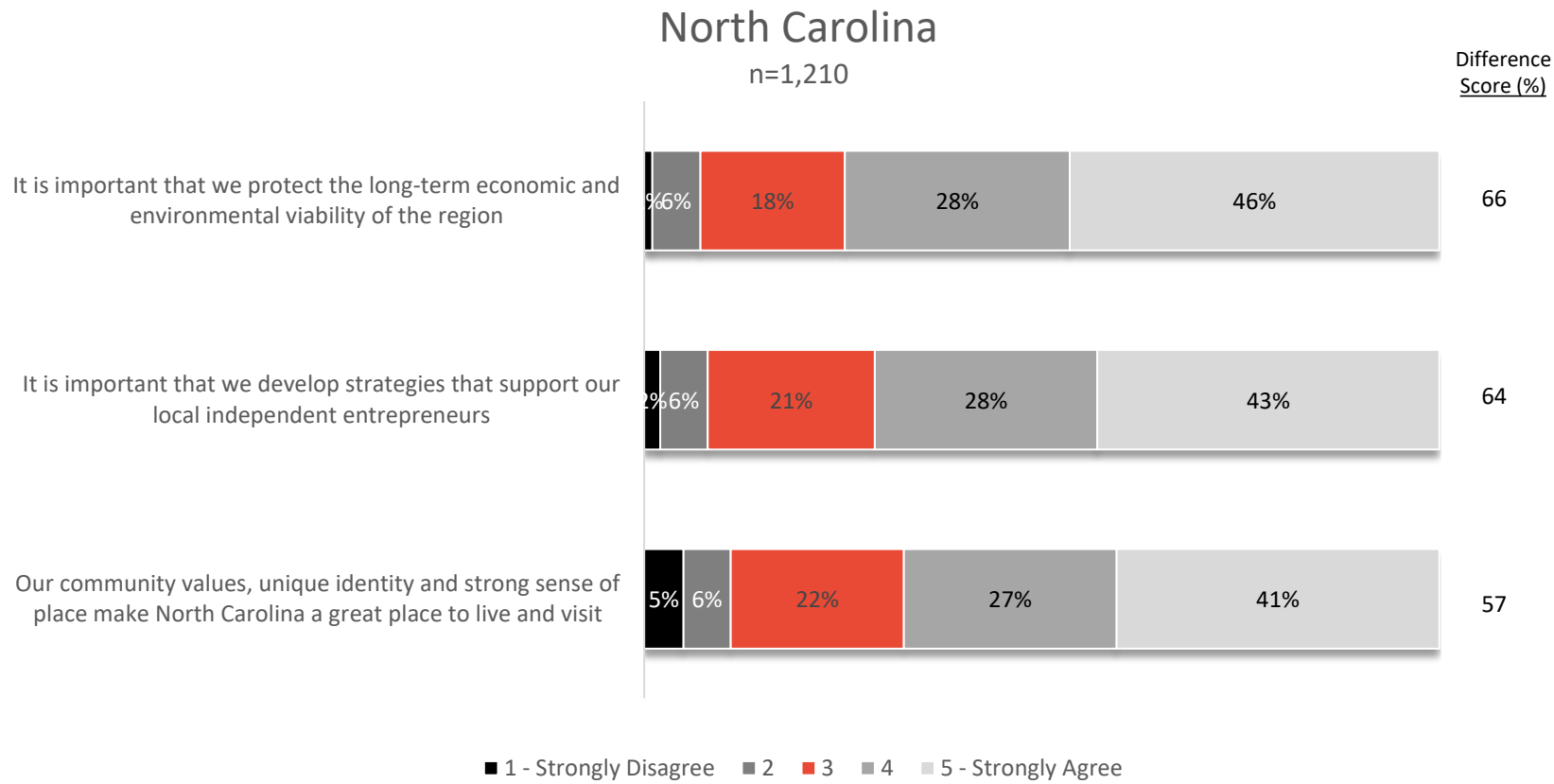
Q12: Using a scale of 1 (not at all important) to 5 (extremely important), please indicate how important you think each of the following sustainability efforts is for North Carolina.

Residents of the Piedmont Region Feel Most Efforts are Similarly Important



Q12: Using a scale of 1 (not at all important) to 5 (extremely important), please indicate how important you think each of the following sustainability efforts is for North Carolina.

North Carolinians Love Their State and Want to Protect its Economic and Environmental Health



Q13: Using a scale of 1 (strongly disagree) to 5 (strongly agree), please indicate your level of agreement with each of the following statements.

The Older Residents Get the Stronger They Feel About North Carolina

North Carolina

Difference Scores (%)

	18-34 n=346	35-54 n=423	55+ n=420
It is important that we protect the long-term economic and environmental viability of the region	45	71	81
It is important that we develop strategies that support our local independent entrepreneurs	56	62	73
Our community values, unique identity and strong sense of place make North Carolina a great place to live and visit	43	54	74

Q13: Using a scale of 1 (strongly disagree) to 5 (strongly agree), please indicate your level of agreement with each of the following statements.

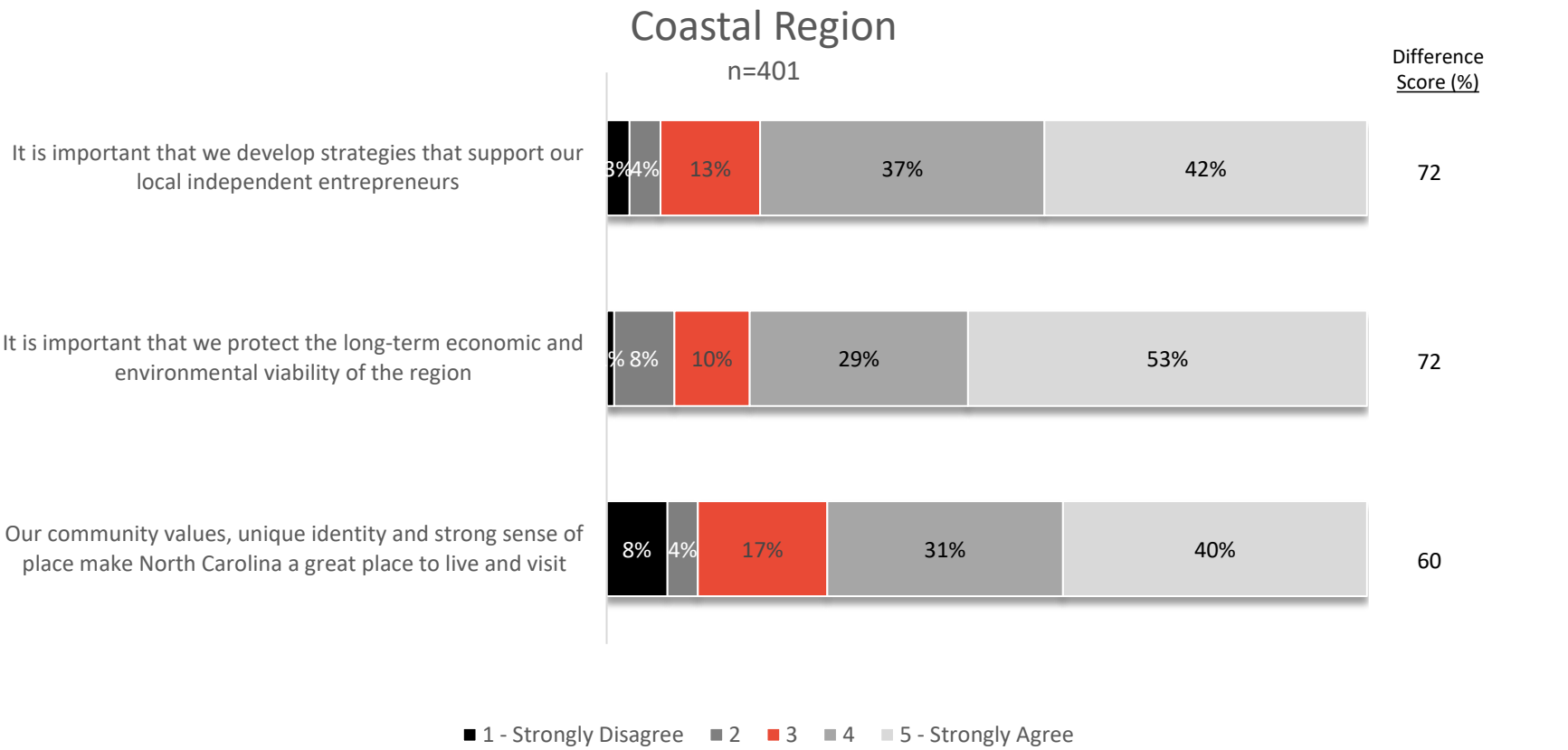
Newer Residents Feel it is Important to Support Local Entrepreneurs; Long-term Residents Feel it is Important to Protect Economic and Environmental Viability

North Carolina
Difference Scores (%)

	<5 Years n=148	5-10 Years n=184	11-20 Years n=234	20+ Years n=255	Born in NC n=389
It is important that we protect the long-term economic and environmental viability of the region	50	61	66	72	71
It is important that we develop strategies that support our local independent entrepreneurs	73	64	48	65	66
Our community values, unique identity and strong sense of place make North Carolina a great place to live and visit	39	64	56	55	62

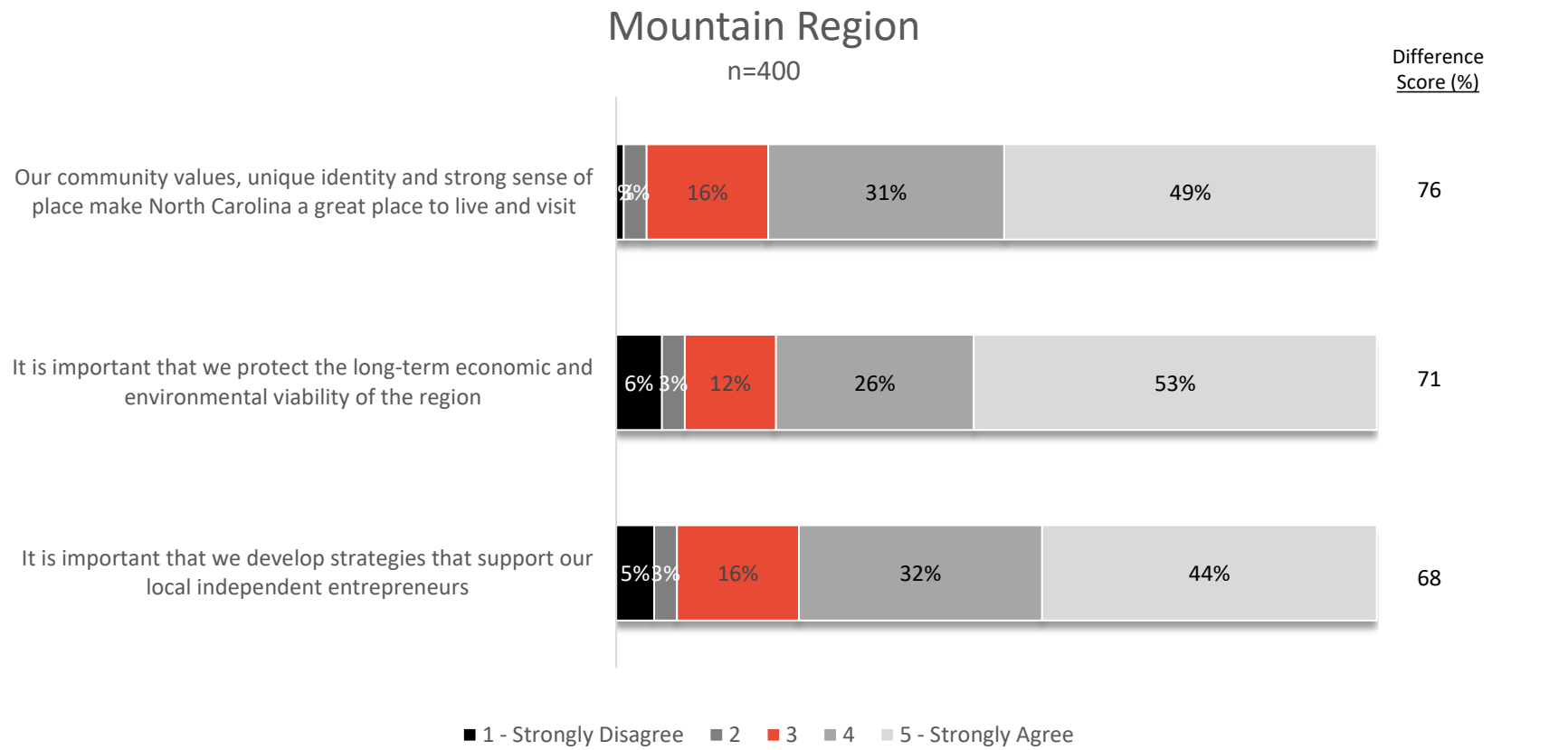
Q13: Using a scale of 1 (strongly disagree) to 5 (strongly agree), please indicate your level of agreement with each of the following statements.

Coastal Region Residents Feel Strongest About Economic Viability of the Region

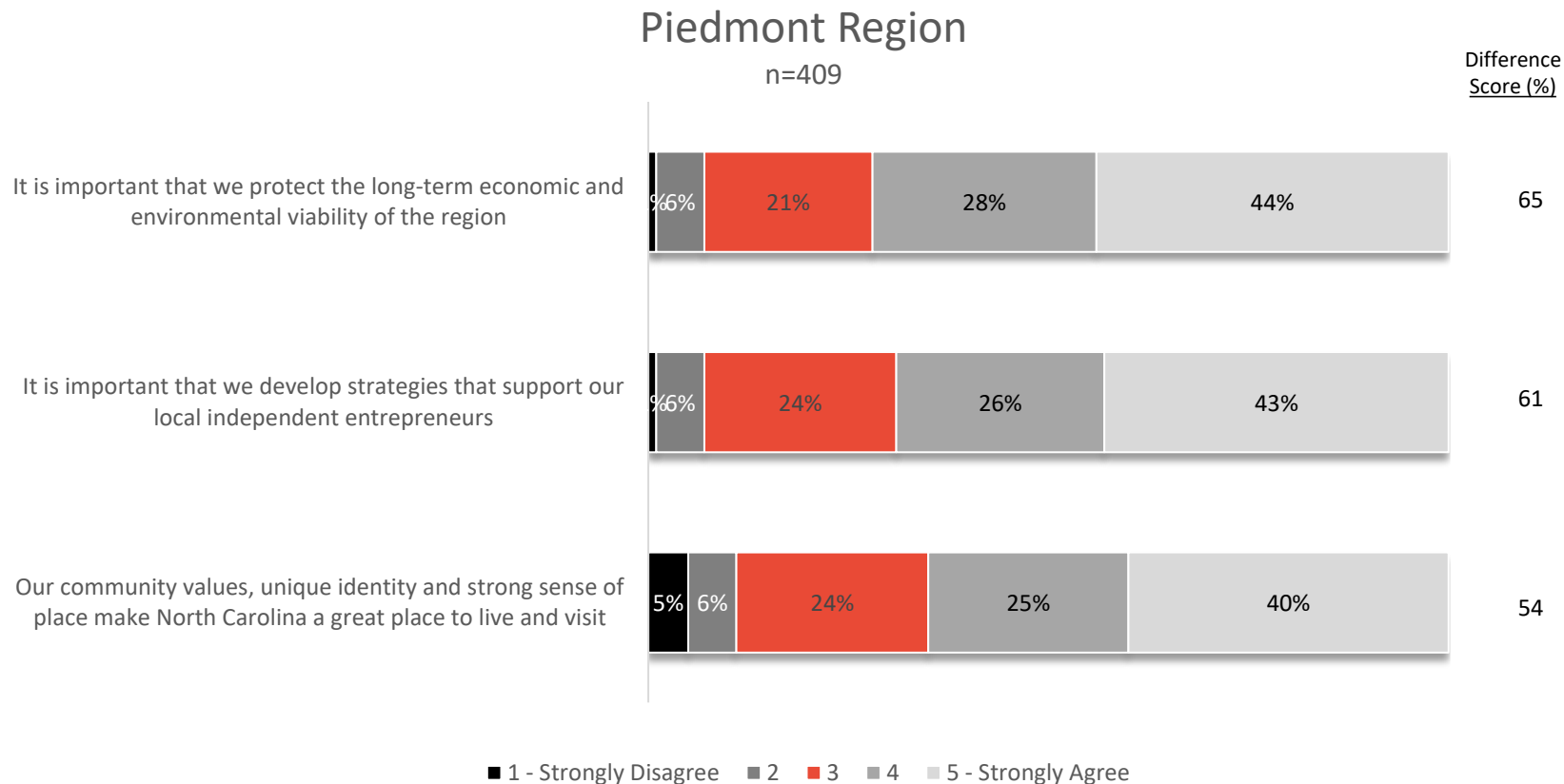


Q13: Using a scale of 1 (strongly disagree) to 5 (strongly agree), please indicate your level of agreement with each of the following statements.

Those Living in the Mountain Region Feel That Community Values and a Strong Sense of Place Make North Carolina a Great Place to Live



Piedmont Region Residents Feel Strongest About the Long-term Economic and Environmental Viability of the Region



Q13: Using a scale of 1 (strongly disagree) to 5 (strongly agree), please indicate your level of agreement with each of the following statements.

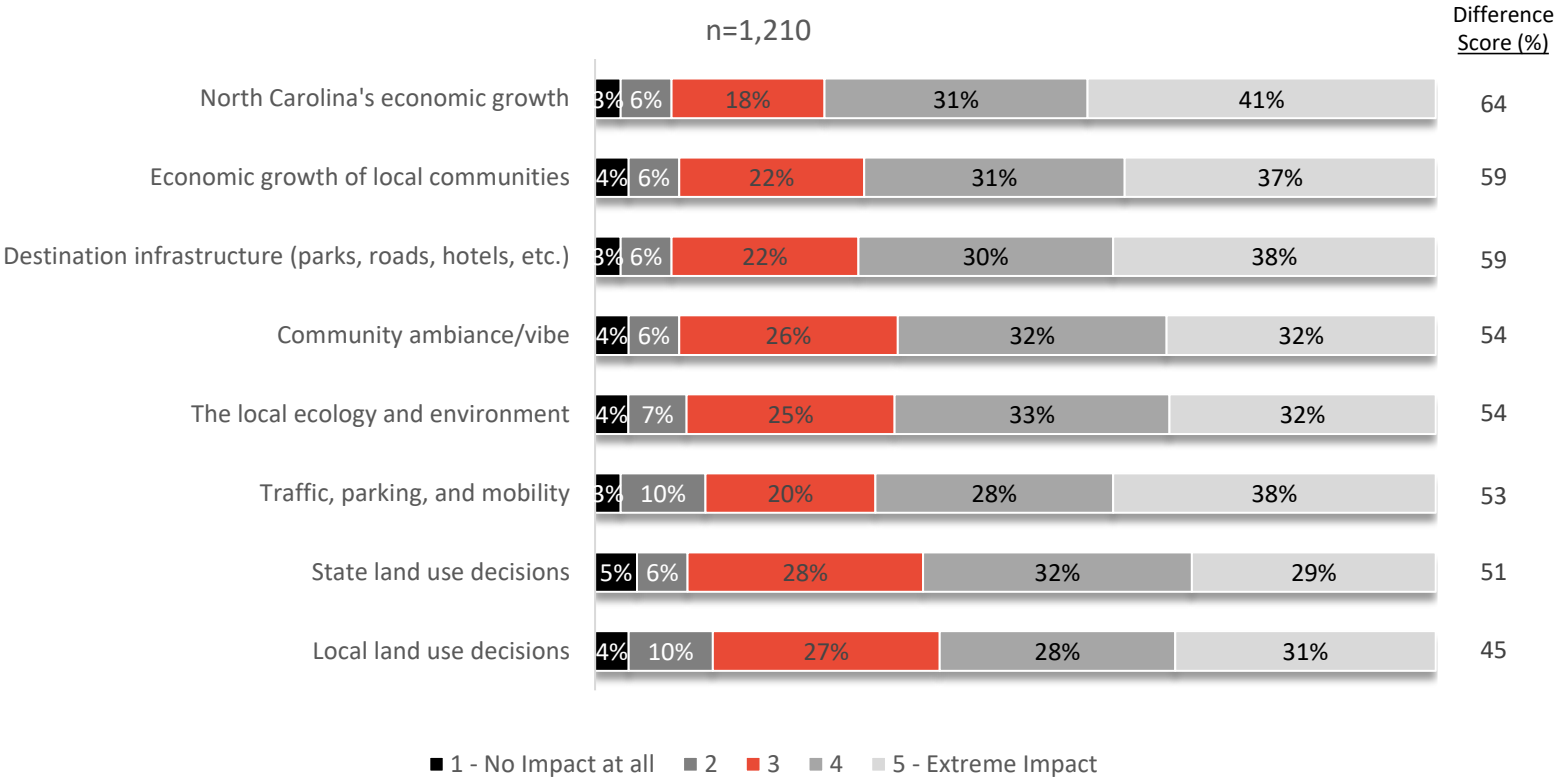
Four horizontal rows of white dots in the top right corner, with lengths decreasing from top to bottom.

Impact of Tourism

Residents Feel Tourism Has Most Impact on State and Local Economic Growth

North Carolina

n=1,210



Q14: Using a scale of 1 (no impact at all) to 5 (extreme impact), please indicate how much impact you think tourism has on each of the following.

The Older Residents Get, the More They Think Tourism Has an Impact on Economic Growth, Infrastructure, Mobility and Land Use Decisions

North Carolina

Difference Scores (%)

	18-34 n=346	35-54 n=423	55+ n=420
North Carolina's economic growth	42	64	84
Economic growth of local communities	46	49	79
Destination infrastructure (parks, roads, hotels, etc.)	32	63	80
Community ambiance/vibe	44	45	71
The local ecology and environment	50	46	66
Traffic, parking, and mobility	43	42	72
State land use decisions	43	40	68
Local land use decisions	31	41	61

Q14: Using a scale of 1 (no impact at all) to 5 (extreme impact), please indicate how much impact you think tourism has on each of the following.

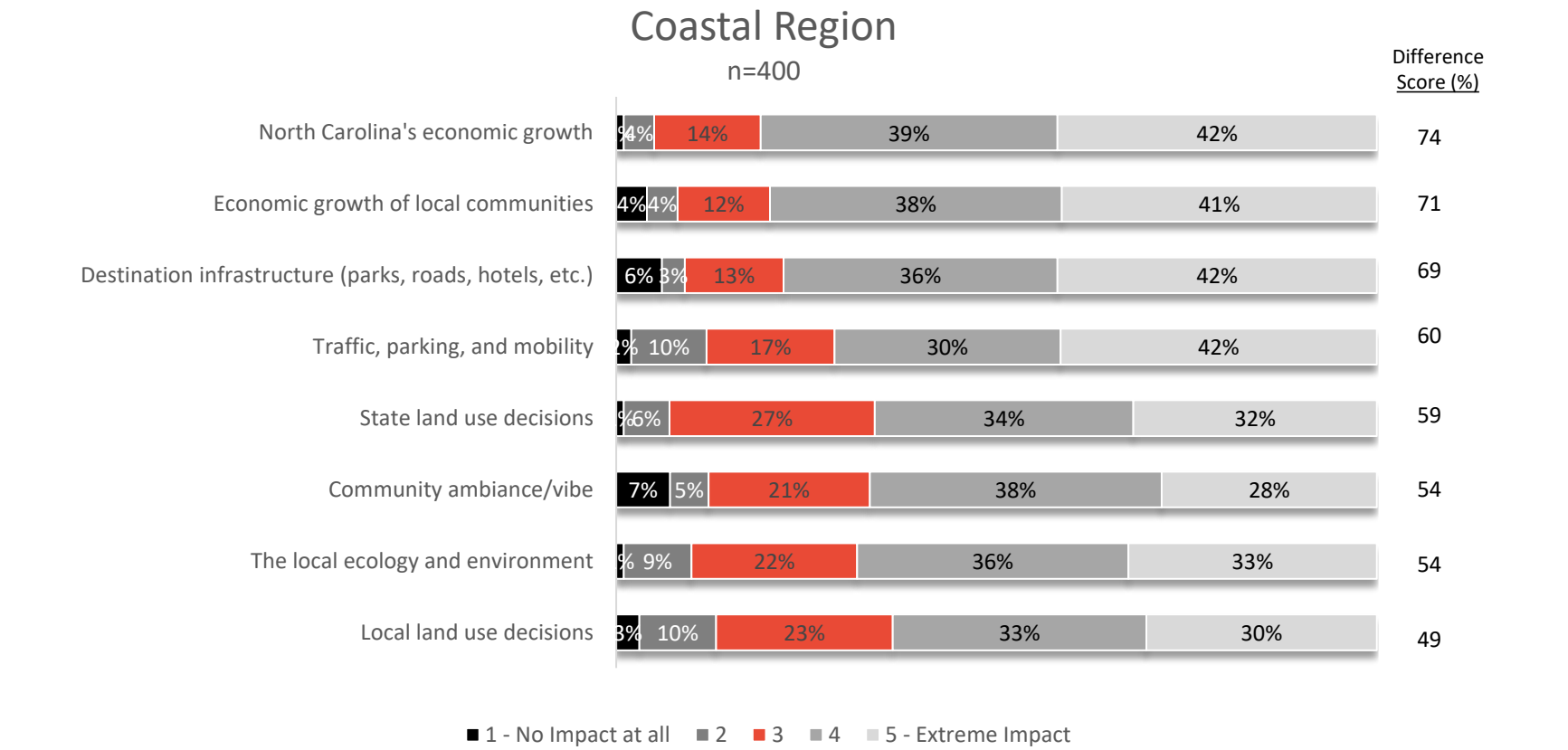
Those Who Have Lived in North Carolina the Longest Think Tourism Has the Greatest Impact on the State and Local Economies as well as Infrastructure

North Carolina
Difference Scores (%)

	<5 Years n=148	5-10 Years n=184	11-20 Years n=234	20+ Years n=255	Born in NC n=389
North Carolina's economic growth	50	48	72	74	66
Economic growth of local communities	74	44	58	72	53
Destination infrastructure (parks, roads, hotels, etc.)	45	57	59	78	54
Community ambiance/vibe	43	42	55	68	54
The local ecology and environment	63	27	58	59	57
Traffic, parking, and mobility	61	38	56	75	44
State land use decisions	64	39	42	65	48
Local land use decisions	46	35	53	65	34

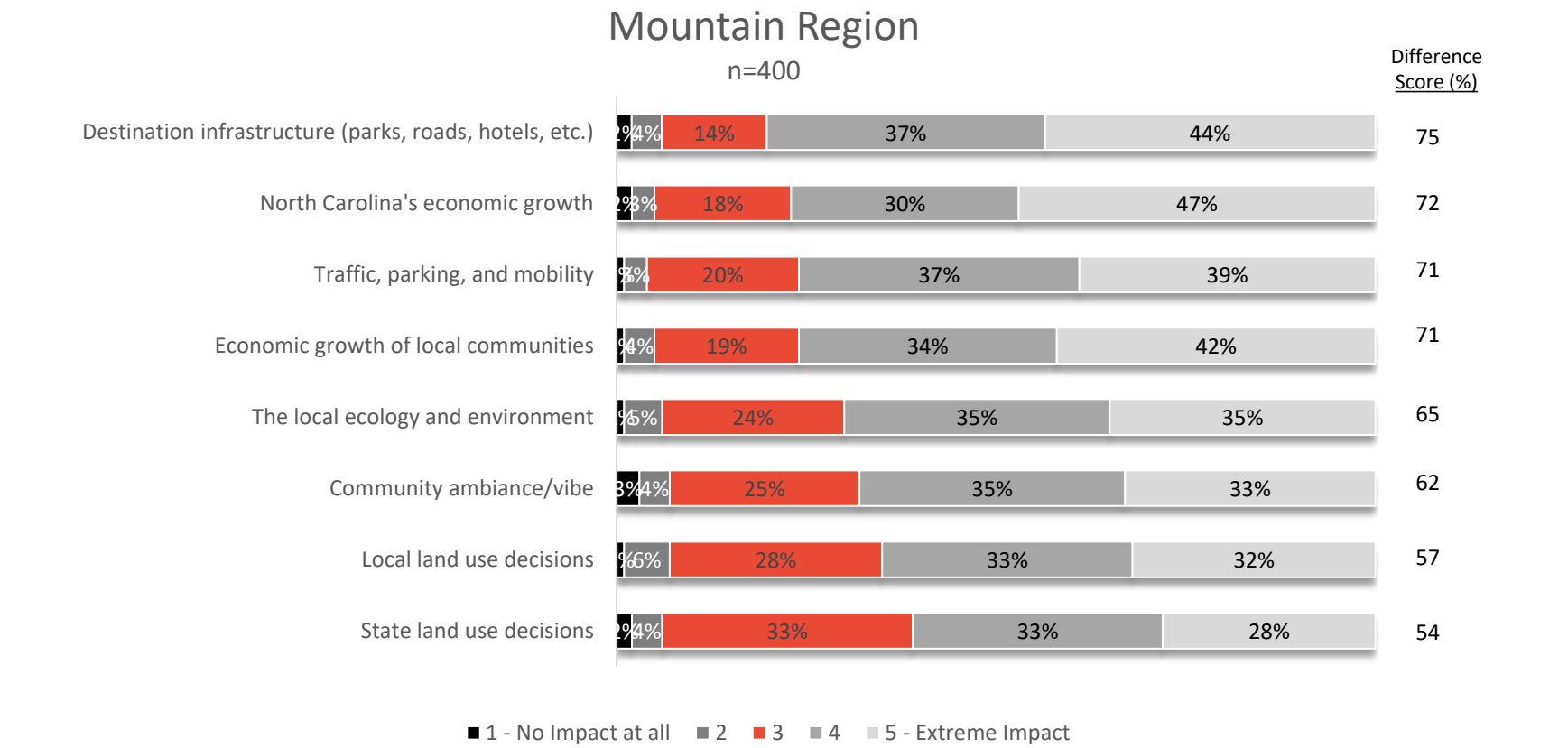
Q14: Using a scale of 1 (no impact at all) to 5 (extreme impact), please indicate how much impact you think tourism has on each of the following.

Coastal Regions Residents Think Tourism Has the Most Impact on State and Local Economies as well as Destination Infrastructure



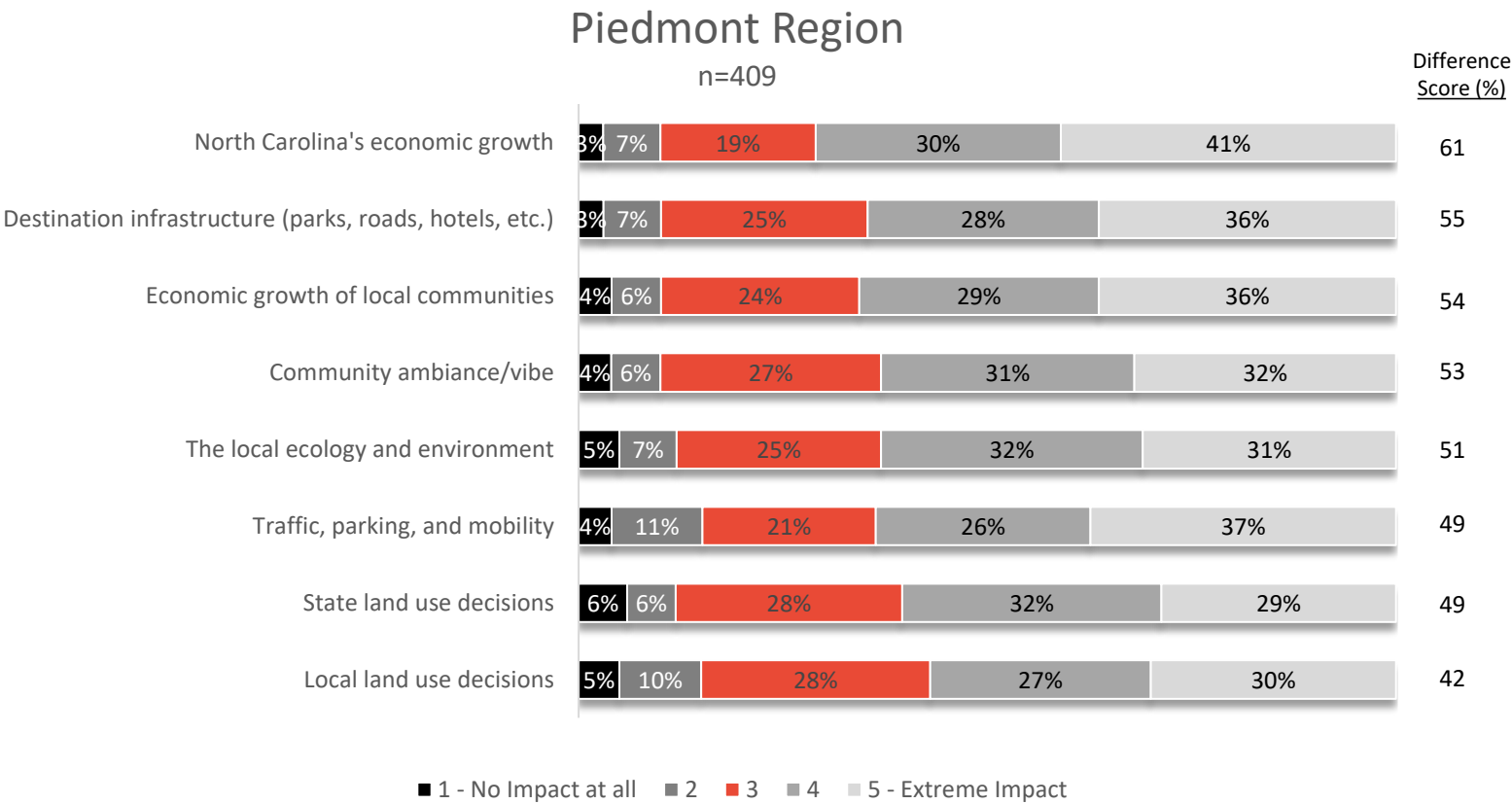
Q14: Using a scale of 1 (no impact at all) to 5 (extreme impact), please indicate how much impact you think tourism has on each of the following.

Those Living in the Mountain Region Think Tourism Has the Most Impact on Destination Infrastructure and Least on Land Use Decisions



Q14: Using a scale of 1 (no impact at all) to 5 (extreme impact), please indicate how much impact you think tourism has on each of the following.

Piedmont Region Residents Think Tourism Has the Most Impact on Economic Growth

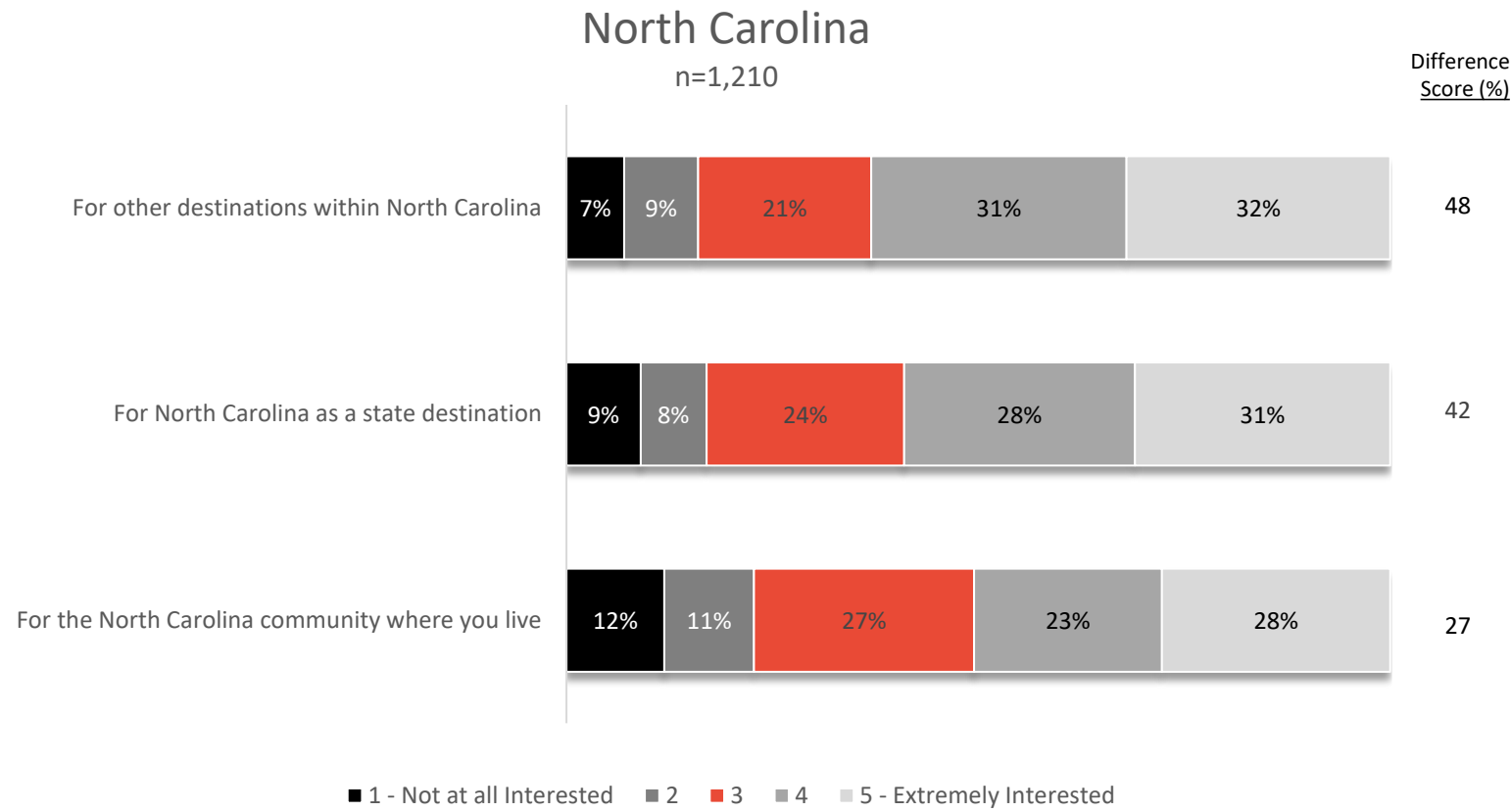


Q14: Using a scale of 1 (no impact at all) to 5 (extreme impact), please indicate how much impact you think tourism has on each of the following.

Four horizontal rows of white dots in the top right corner, decreasing in length from top to bottom.

Destination Marketing

Residents Are Most Interested in Seeing Advertising For Destinations Within North Carolina



Q15: Using a scale of 1 (not at all interested) to 5 (extremely interested), how interested are you to see promotional advertising for North Carolina as a destination or other destinations within North Carolina?

Those Under 55 Would be Most Interested in Seeing Promotional Advertising for Other Destinations Within North Carolina

North Carolina
Difference Scores (%)

	18-34 n=346	35-54 n=423	55+ n=420
For other destinations within North Carolina	50	41	52
For North Carolina as a state destination	35	34	55
For the North Carolina community where you live	35	13	32

Q15: Using a scale of 1 (not at all interested) to 5 (extremely interested), how interested are you to see promotional advertising for North Carolina as a destination or other destinations within North Carolina?

New and Long-time Residents Would be Most Interested in Seeing Promotional Advertising for Other Destinations Within the State

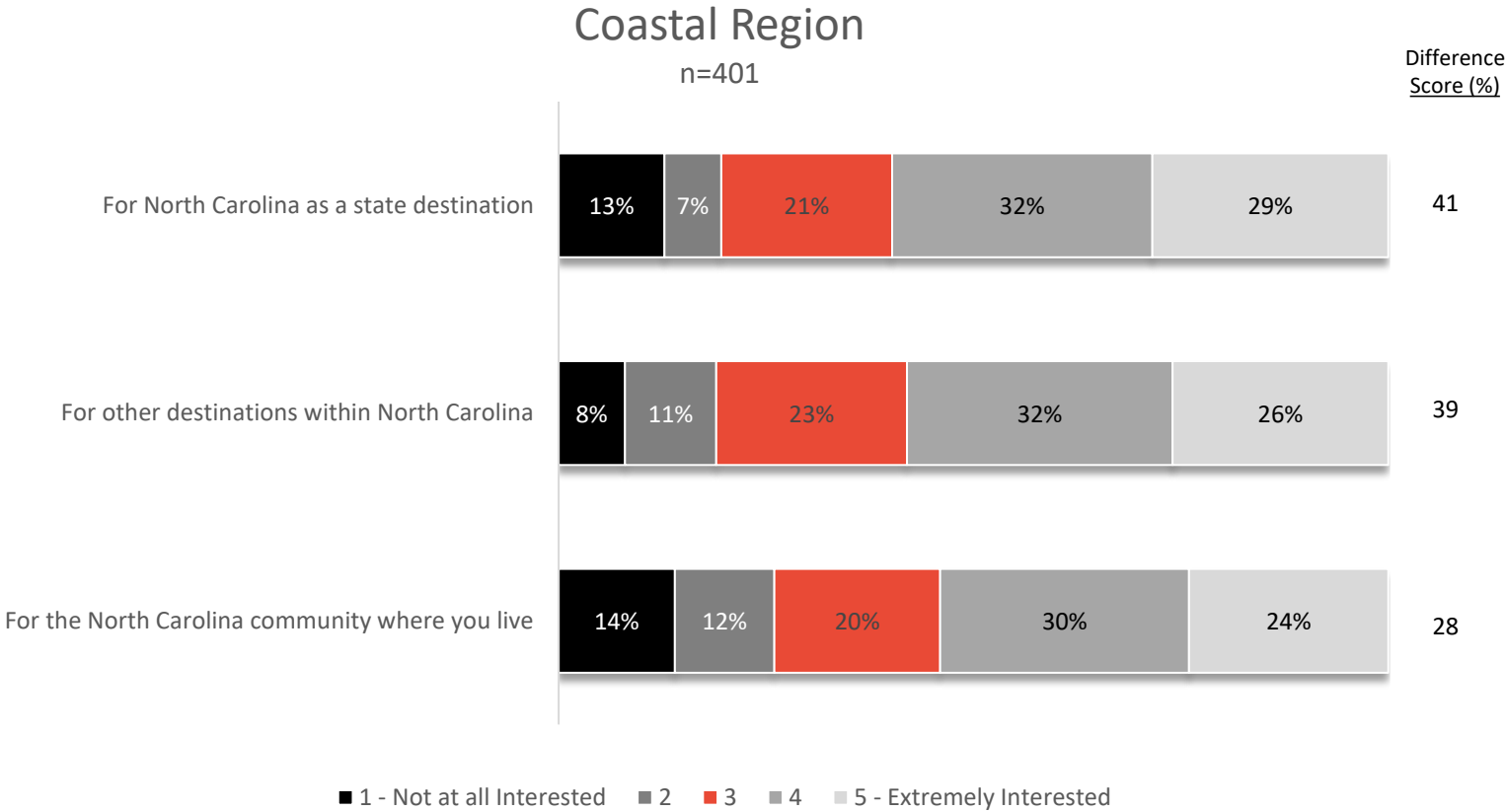
North Carolina

Difference Scores (%)

	<5 Years n=148	5-10 Years n=184	11-20 Years n=234	20+ Years n=255	Born in NC n=389
For other destinations within North Carolina	61	49	48	41	47
For North Carolina as a state destination	43	39	34	48	43
For the North Carolina community where you live	42	4	31	30	27

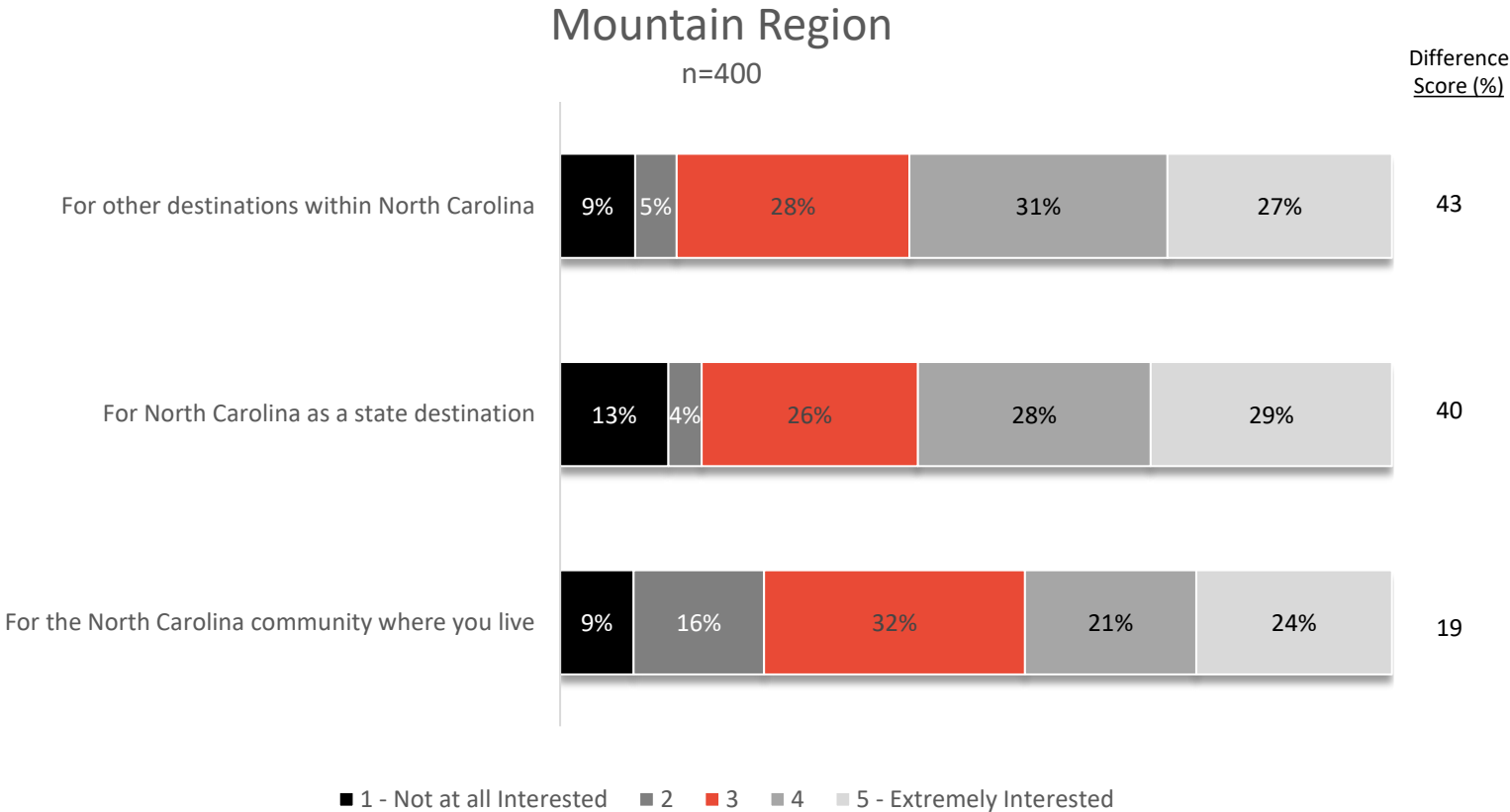
Q15: Using a scale of 1 (not at all interested) to 5 (extremely interested), how interested are you to see promotional advertising for North Carolina as a destination or other destinations within North Carolina?

Coastal Region Residents are Most Interested in Seeing Promotional Advertising for North Carolina and Destinations Within the State



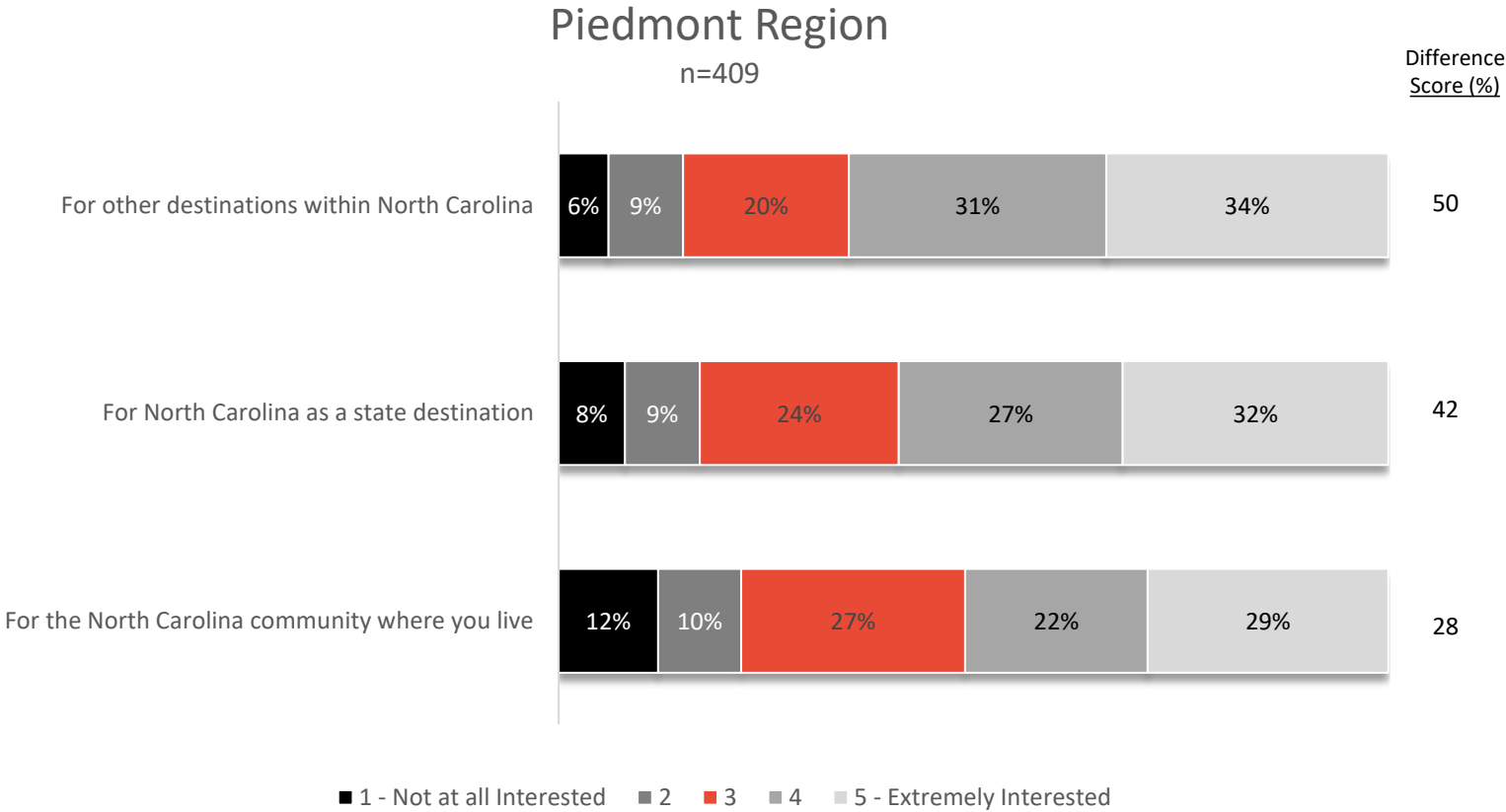
Q15: Using a scale of 1 (not at all interested) to 5 (extremely interested), how interested are you to see promotional advertising for North Carolina as a destination or other destinations within North Carolina?

Those Living in the Mountain Region are Most Interested in Seeing Promotional Advertising for Other Destinations Within North Carolina



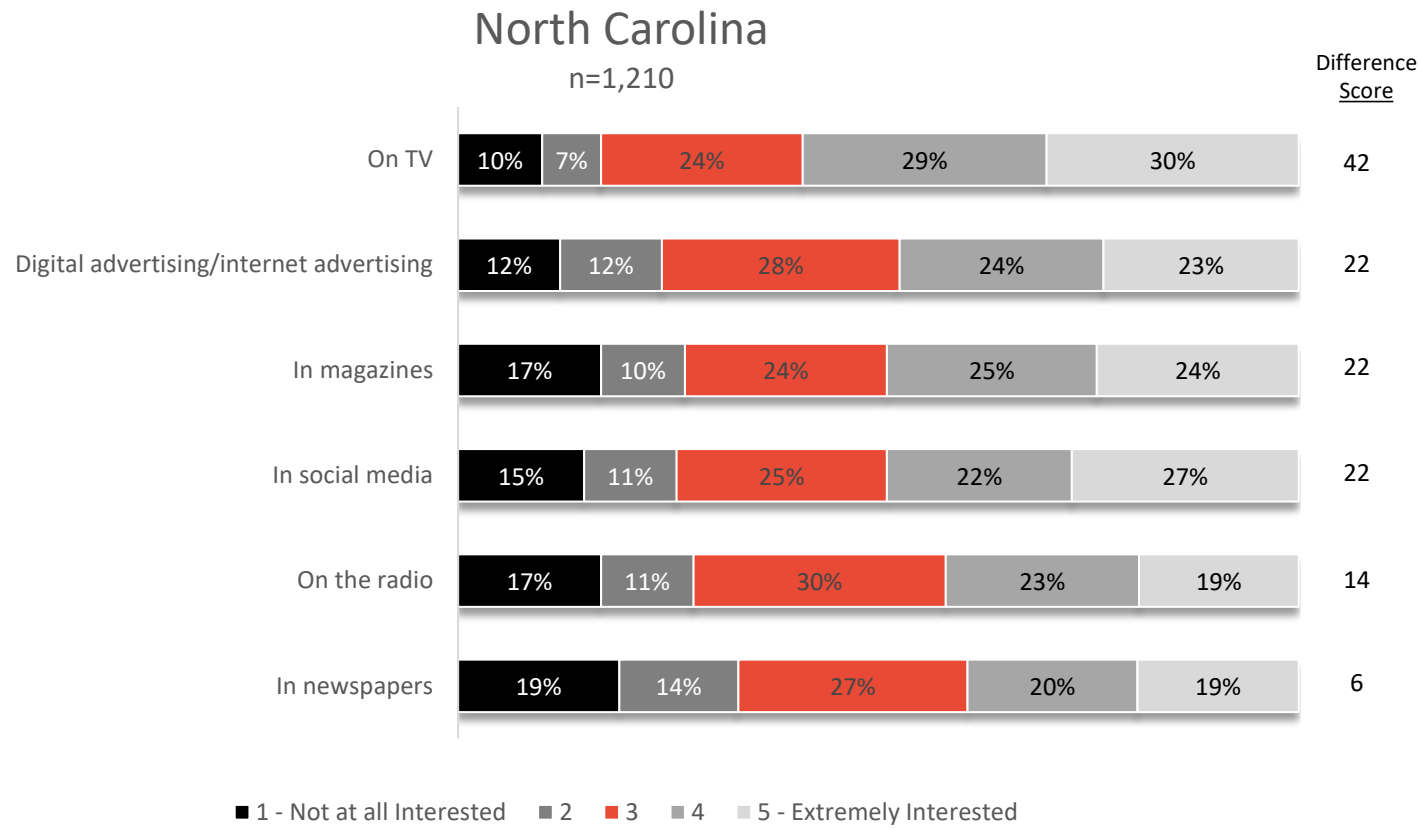
Q15: Using a scale of 1 (not at all interested) to 5 (extremely interested), how interested are you to see promotional advertising for North Carolina as a destination or other destinations within North Carolina?

Piedmont Region Residents are Most Interested in Seeing Promotional Advertising for Other Destinations Within North Carolina



Q15: Using a scale of 1 (not at all interested) to 5 (extremely interested), how interested are you to see promotional advertising for North Carolina as a destination or other destinations within North Carolina?

Residents Would Overwhelmingly Prefer to See Advertising for North Carolina Destinations on TV



Q16: Using a scale of 1 (not at all interested) to 5 (extremely interested), please indicate your level of interest in the type of media you would be interested in seeing promotional advertising for North Carolina as a destination or other destinations within North Carolina.

Even Youngest Residents Are More Interested in Seeing Promotional Advertising on TV Than on Social Media or Digital/Internet

North Carolina Difference Scores (%)

	18-34 n=346	35-54 n=423	55+ n=420
On TV	43	32	51
Digital advertising/internet advertising	26	25	17
In magazines	24	16	25
In social media	31	26	12
On the radio	28	5	12
In newspapers	9	-10	19

Q16: Using a scale of 1 (not at all interested) to 5 (extremely interested), please indicate your level of interest in the type of media you would be interested in seeing promotional advertising for North Carolina as a destination or other destinations within North Carolina.

The Least Preferred Media for Promotional Advertising are Newspapers, Regardless of Length of Residency

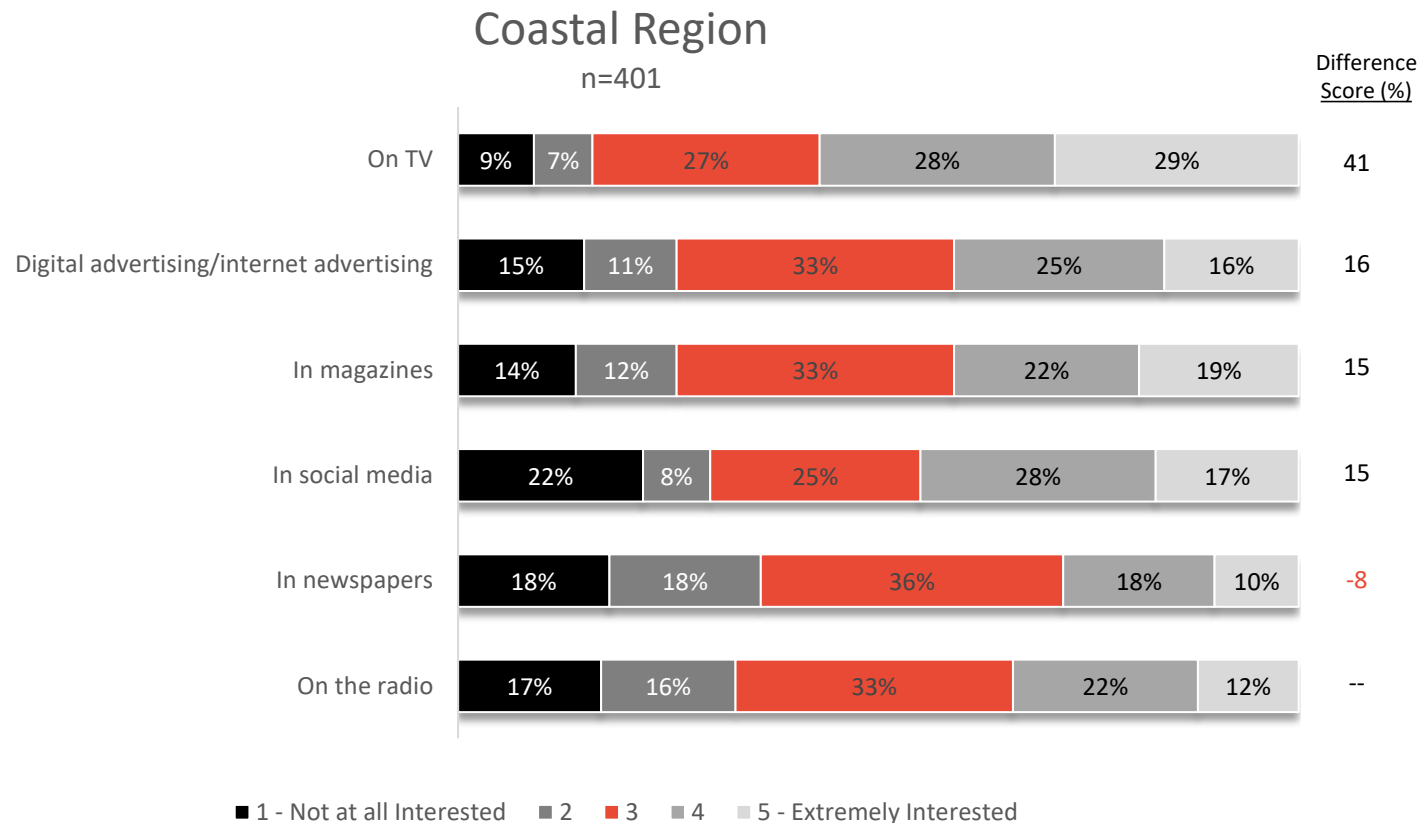
North Carolina

Difference Scores (%)

	<5 Years n=148	5-10 Years n=184	11-20 Years n=234	20+ Years n=255	Born in NC n=389
On TV	42	20	43	50	46
Digital advertising/internet advertising	25	20	13	26	24
In magazines	28	15	17	28	21
In social media	16	17	25	16	28
On the radio	32	-18	9	24	19
In newspapers	14	-26	8	12	12

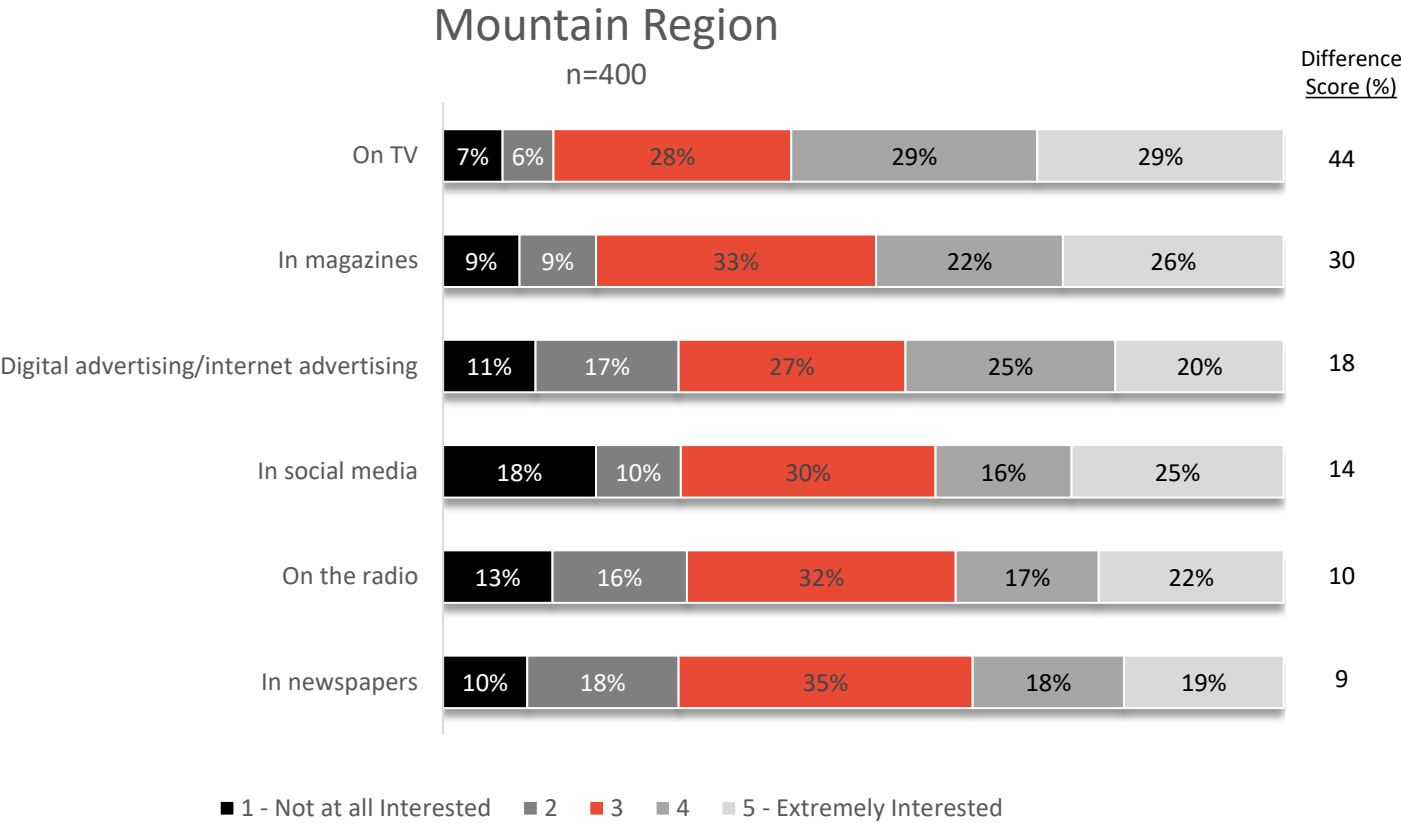
Q16: Using a scale of 1 (not at all interested) to 5 (extremely interested), please indicate your level of interest in the type of media you would be interested in seeing promotional advertising for North Carolina as a destination or other destinations within North Carolina.

3 out of 5 Coastal Region Residents Would be Interested in Seeing Promotional Advertising For North Carolina Destinations on TV



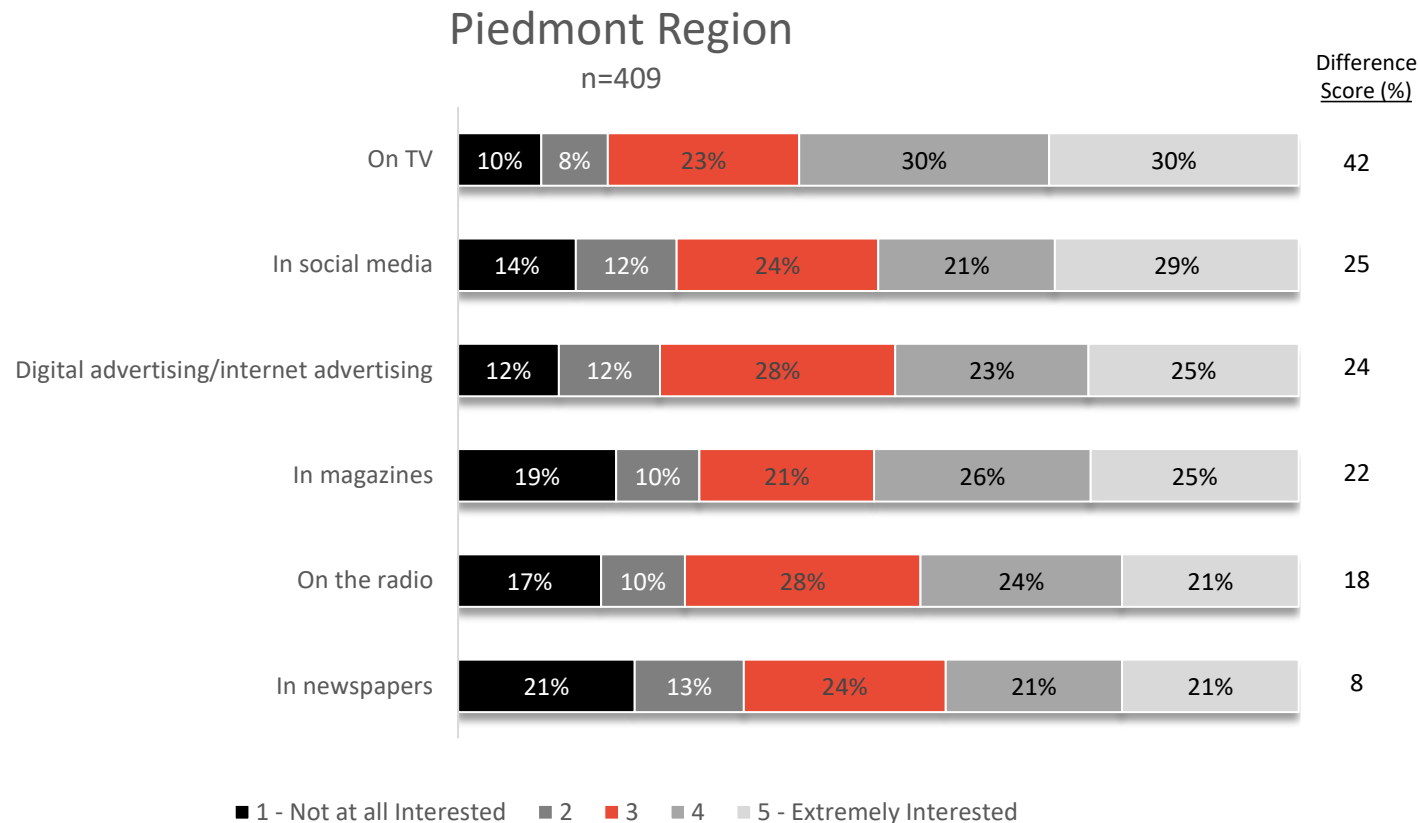
Q16: Using a scale of 1 (not at all interested) to 5 (extremely interested), please indicate your level of interest in the type of media you would be interested in seeing promotional advertising for North Carolina as a destination or other destinations within North Carolina.

In Addition to TV, Residents of the Mountain Region Would Also Be Interested in Seeing North Carolina Destination Advertising in Magazines



Q16: Using a scale of 1 (not at all interested) to 5 (extremely interested), please indicate your level of interest in the type of media you would be interested in seeing promotional advertising for North Carolina as a destination or other destinations within North Carolina.

Piedmont Region Residents are Most Interested in Seeing North Carolina Promotional Advertising on TV and Least Interested in Newspapers

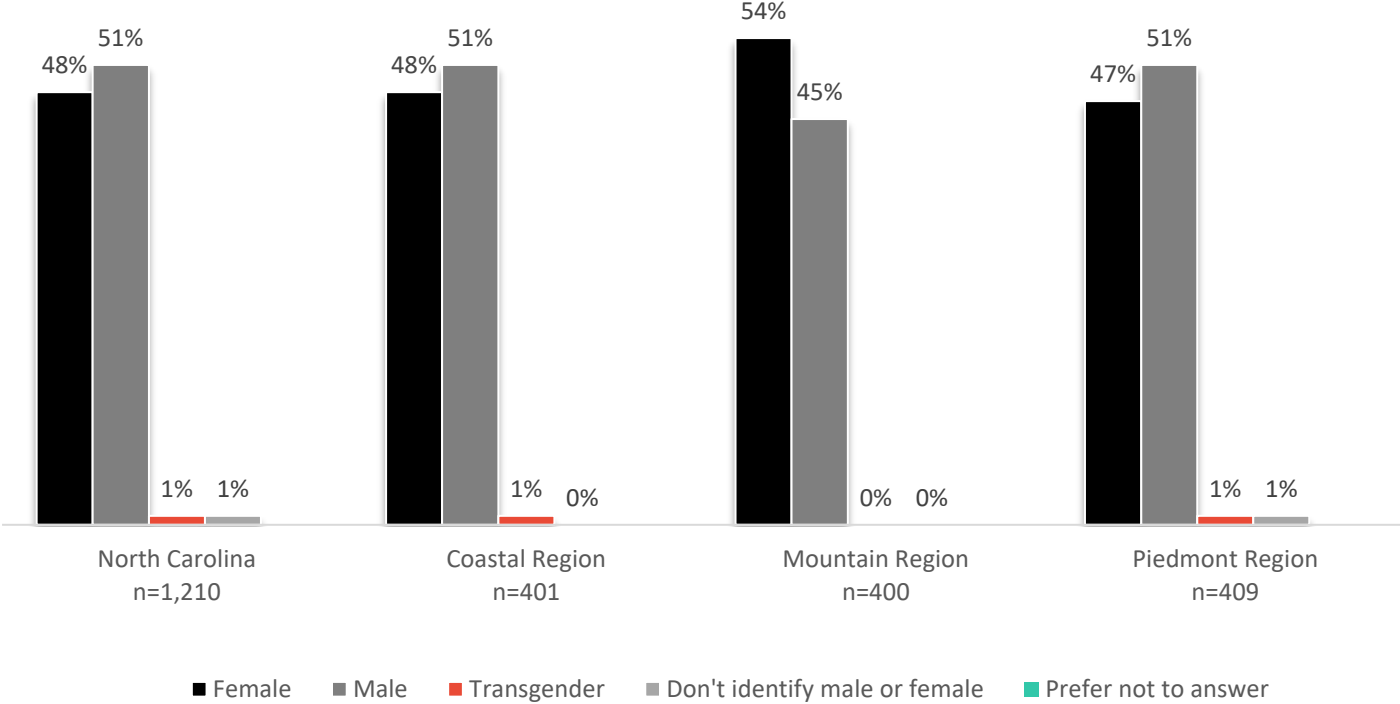


Q16: Using a scale of 1 (not at all interested) to 5 (extremely interested), please indicate your level of interest in the type of media you would be interested in seeing promotional advertising for North Carolina as a destination or other destinations within North Carolina.

Four horizontal dotted lines of varying lengths, starting from the right edge and extending leftwards, creating a staircase effect.

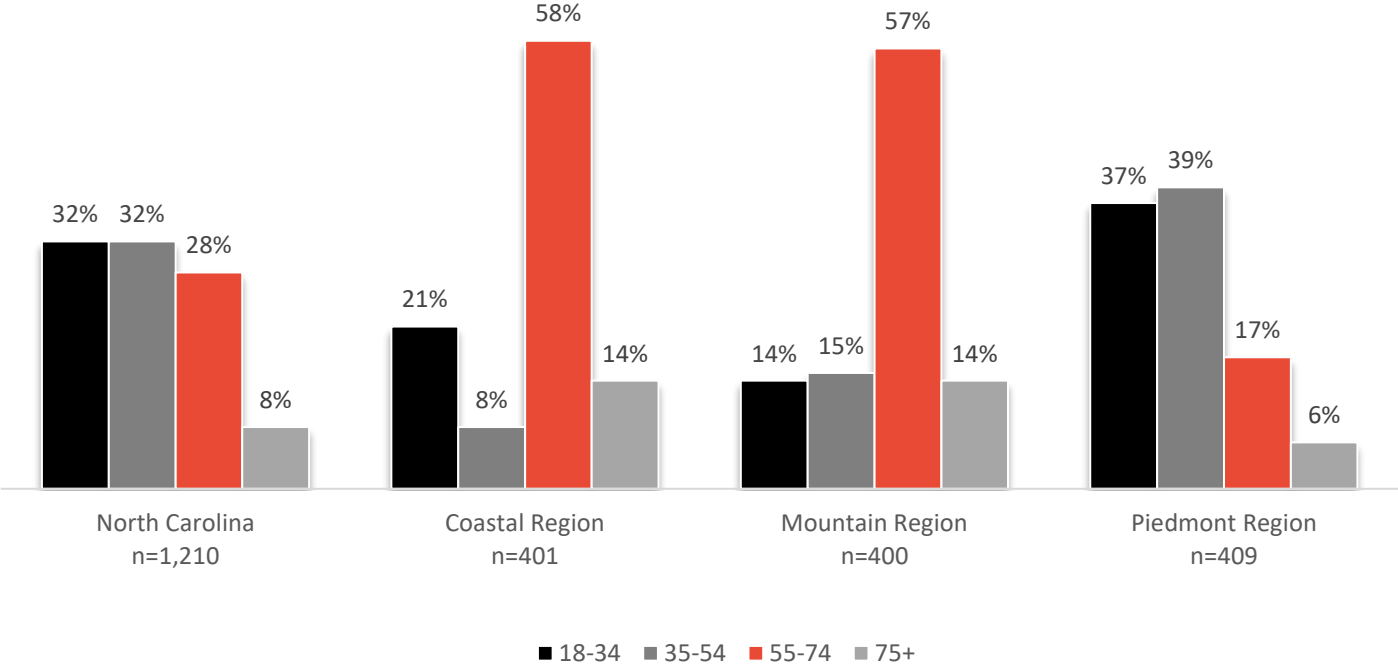
Demographics

Gender



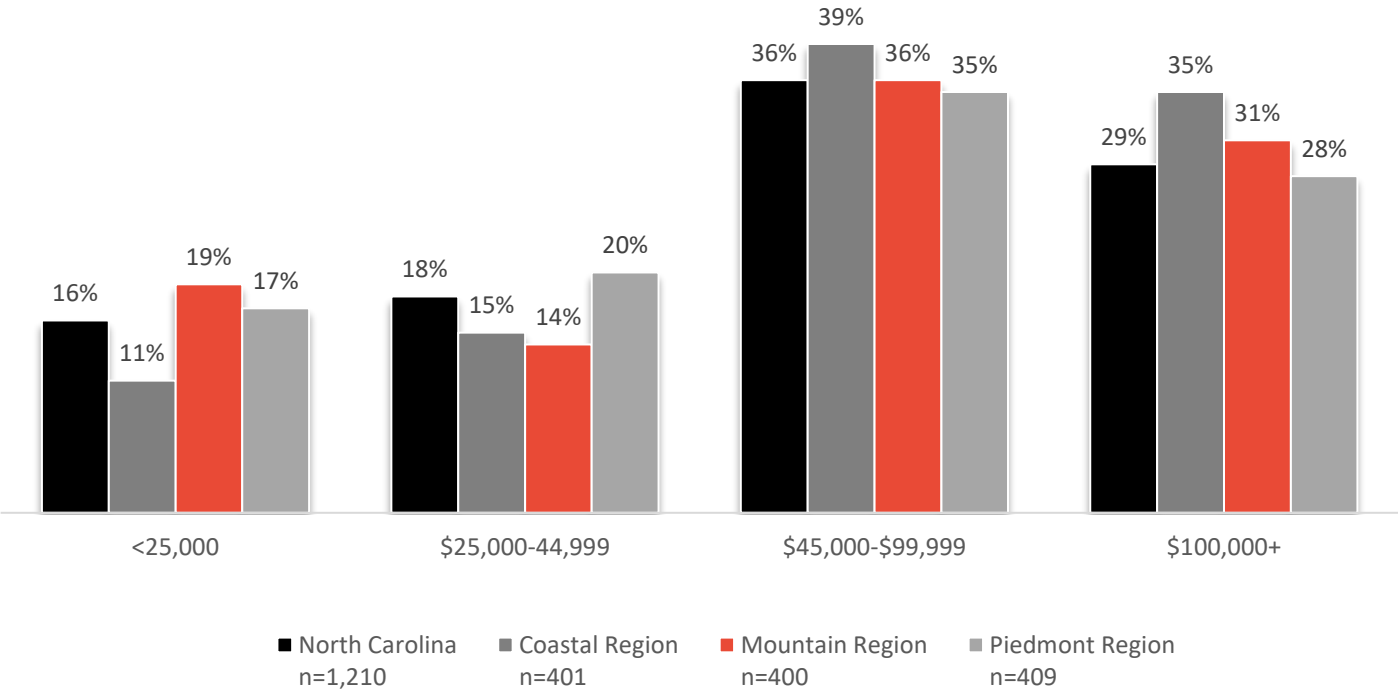
Q: How do you identify yourself?

Age



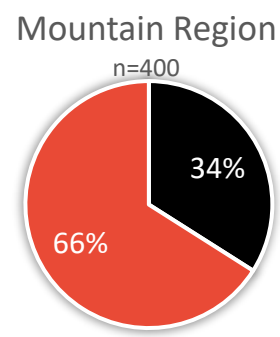
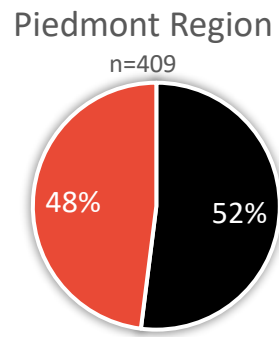
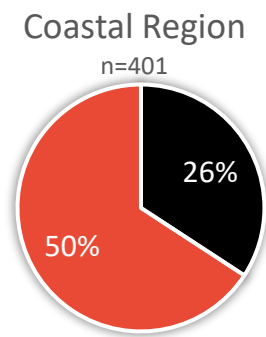
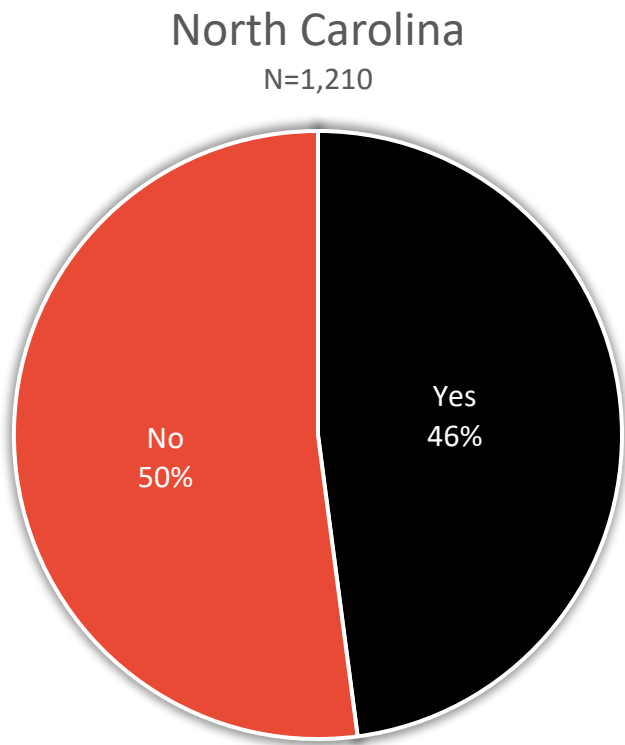
Q: Which of the following categories includes your age?

Household Income



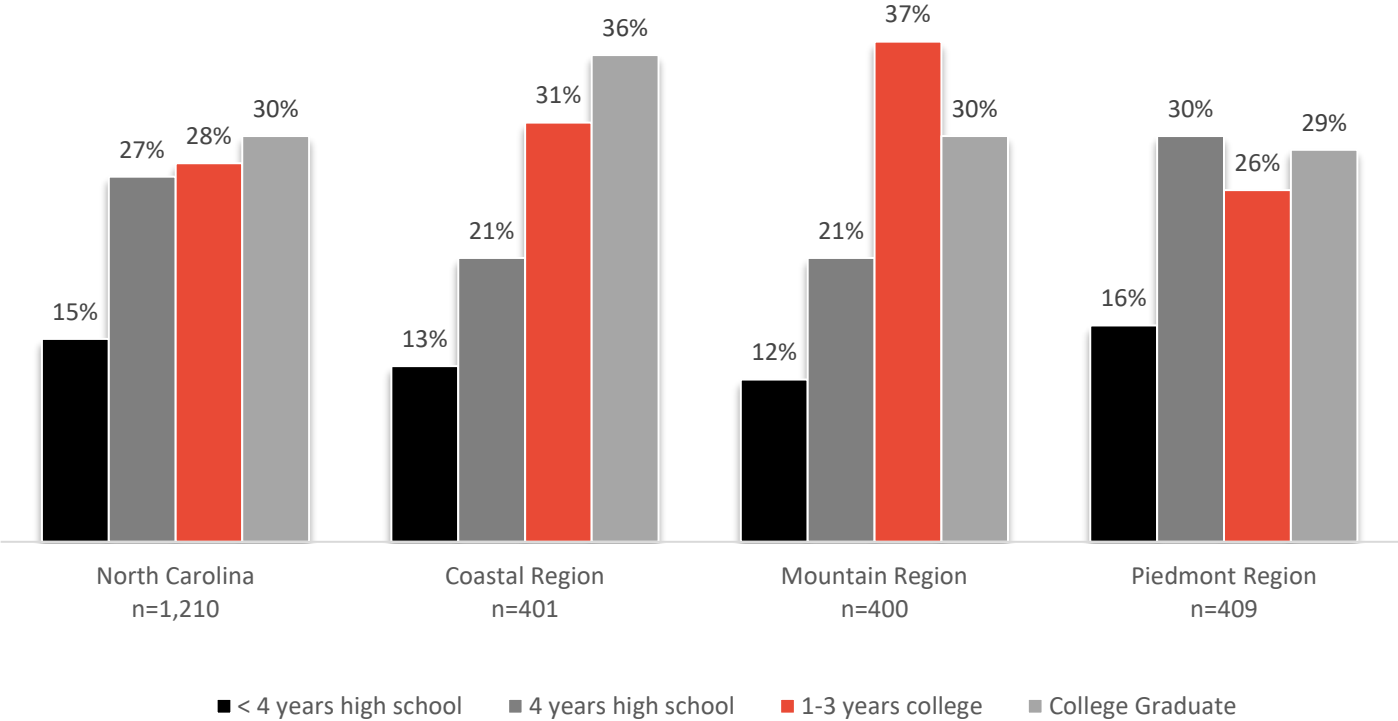
Q: What is your annual household income?

Children in Household



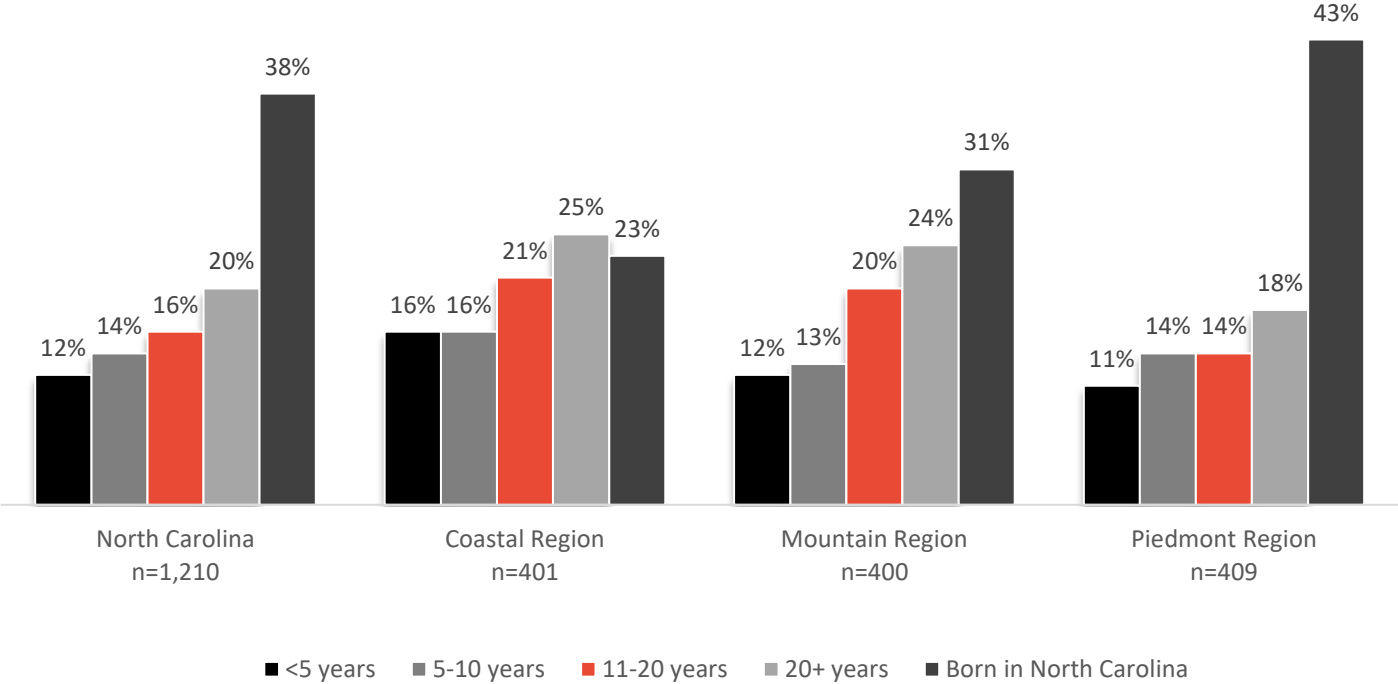
Q: Do you currently have children 18 years of age or younger living in your household?

Education



Q: What is the highest level of education you completed?

North Carolina Residency



Q: How long have you been a resident of North Carolina?

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