Wilmington **n.c.**
River District & Island Beaches

VISITOR PROFILE & EXPENDITURE RESEARCH STUDY

REPORT OF FINDINGS

August 2020

Destination ◆ Analysts

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RESEARCH OVERVIEW & OBJECTIVES

This report presents the findings of a Visitor Profile & Expenditure Research Study conducted on behalf of the Wilmington and Beaches Convention & Visitors Bureau by Destination Analysts.

The primary objective of this study—to collect annual and seasonal data on Wilmington and Beaches visitors—is supported by learning about the destination's visitors, including:

- Visitor point of origin
- Visitor arrival and departure methods
- Activities and attractions in-market
- Length of stay
- Detailed in-market spending
- Rate of first-time visitors to the destination
- Likelihood to return
- Inspiration/motivations for visiting Wilmington and Beaches
- Visitor perceptions of the destination
- Satisfaction with the visitor experience
- Travel party composition
- Visitor demographics
- Trip planning resources utilized
- Other topics of interest to WBCVB

Above: Images of Wilmington and Beaches. Courtesy of instagram.com/wilmingtoncoast

RESEARCH METHODOLOGY

Destination Analysts worked closely with the Wilmington and Beaches Convention & Visitors Bureau on developing the questionnaire for this study, otherwise referred to as the Wilmington and Beaches Survey of Owned Audiences. On behalf of the Wilmington and Beaches CVB, Destination Analysts sent the online survey via email to the CVB's lists of visitor guide requestors and e-special subscribers.

Given this approach of surveying the Wilmington and Beaches CVB's owned audiences, it should be noted that survey respondents are not the typical or average visitor to the destination (e.g., the average visitor who could potentially be surveyed in-market via an in-person intercept survey approach). Rather, recent visitors surveyed for this study are those who are engaged with the CVB.

In order to complete the full survey, respondents must have met the following screening requirements:

- Adults age 18+

- Must currently live outside of New Hanover County, NC

Recent visitors were identified as those who visited Wilmington and Beaches during the 12-month period of study between March 2019 – March 2020.

Note: Data collected for this study was weighted by place of stay data collected from the survey as well as Wilmington and Beaches room inventory, occupancy rate and occupied housing units to more accurately reflect the makeup of the Wilmington and Beaches visitor population.
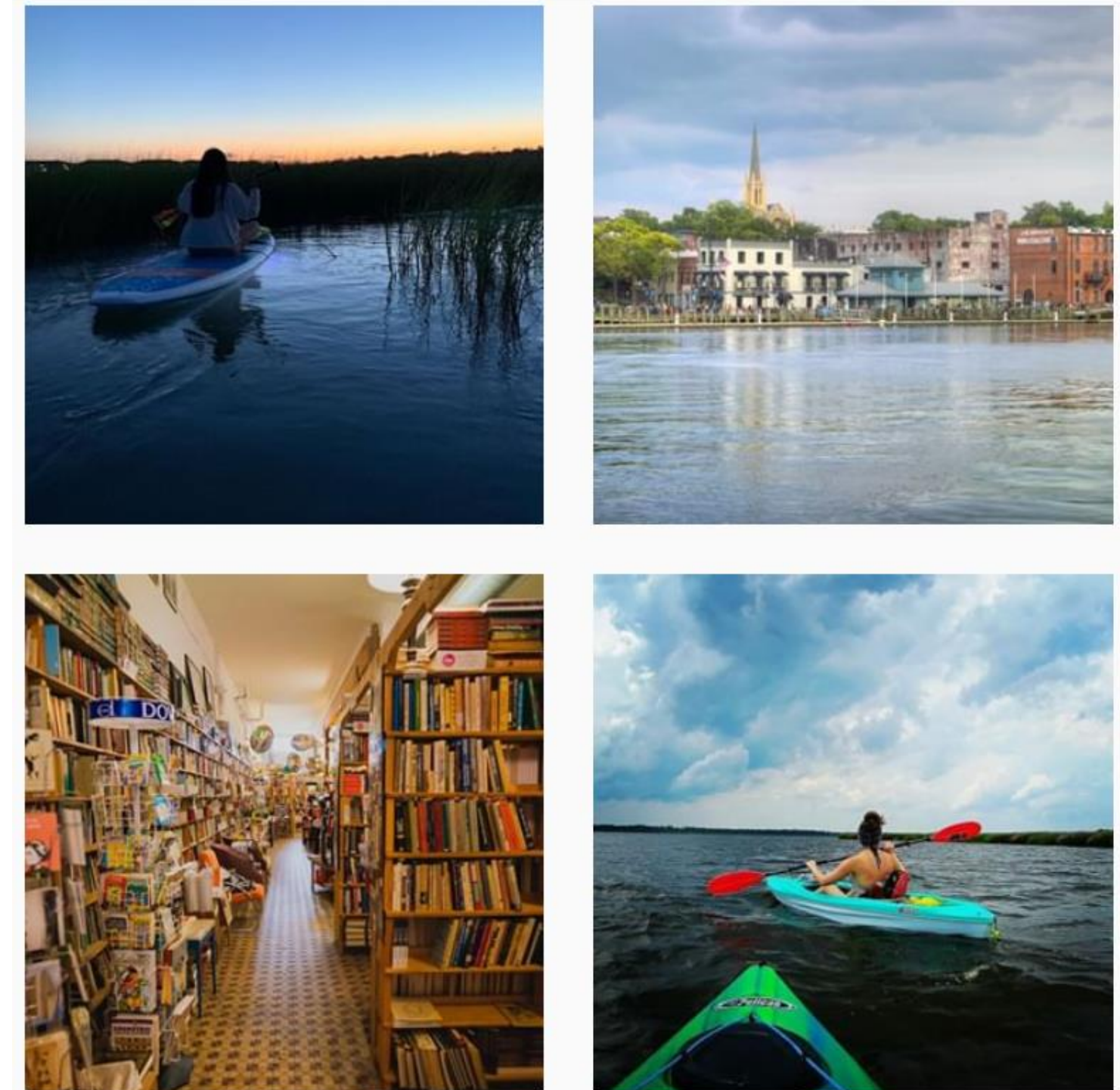
Above: Images of Wilmington and Beaches. Courtesy of instagram.com/wilmingtoncoast
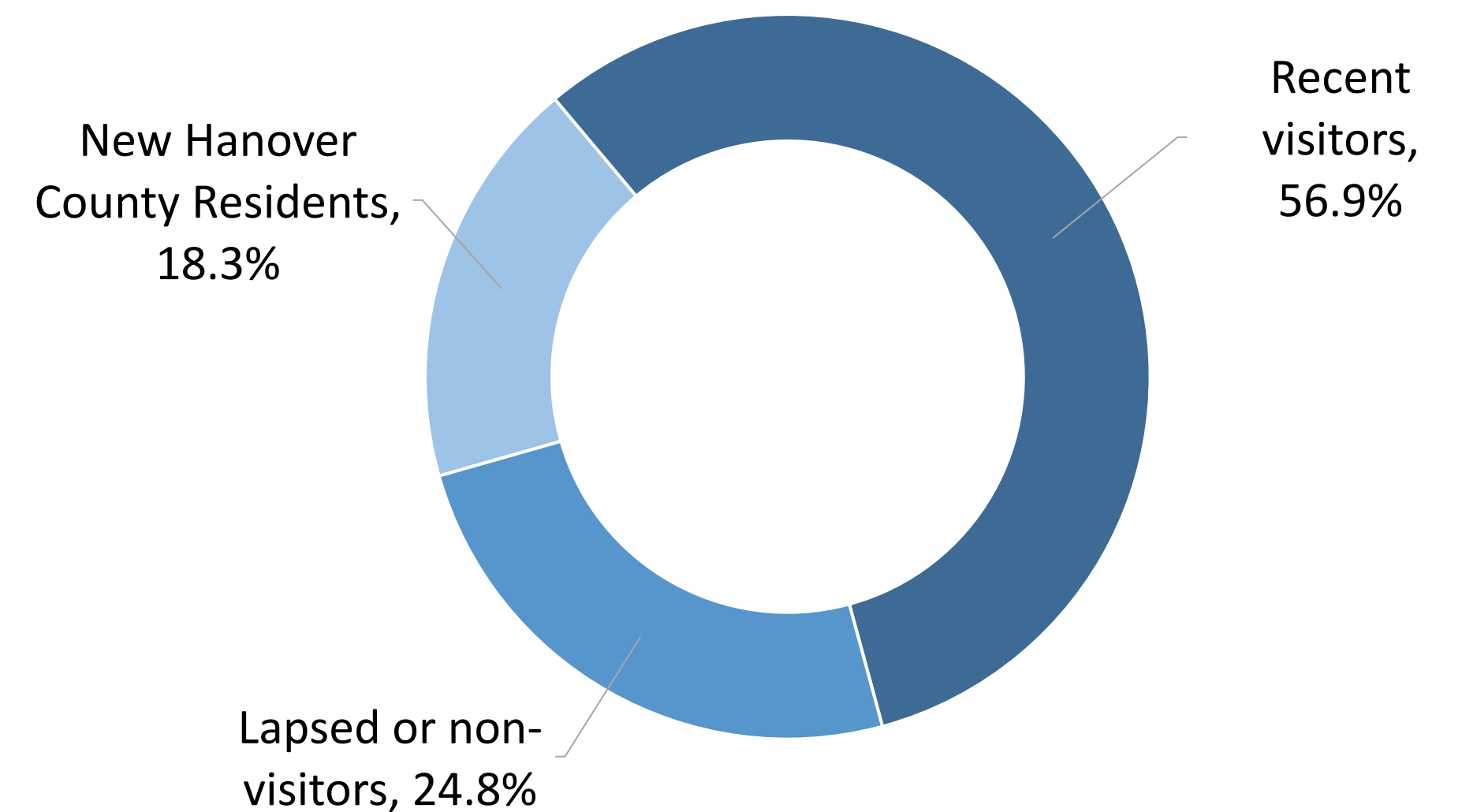
DATA COLLECTION

In total, 2,157 completed surveys were collected between April 6 and May 31, 2020 from the Wilmington and Beaches CVB's owned audiences.

Of the 2,157 completed surveys, 1,227 surveys, or 56.9 percent, were from recent visitors who took a trip to Wilmington and Beaches in the past year. 536 surveys, or 24.8 percent, were from lapsed or non-visitors who live outside New Hanover County and did not visit Wilmington and Beaches in the past year. The remaining 394 surveys, or 18.3 percent, were from New Hanover County residents who completed the psychographic and demographic questions within the survey.

Breakout of All Completed Surveys Collected by Respondent Type:

Wilmington and Beaches CVB Owned Audiences	
Number of unique email addresses from the eSpecial subscribers list who have opened at least one email between April 2019 and April 2020	38,854
Number of unique email addresses who requested the official visitor guide between September 2018 – March 2020	4,552
Estimated total of Wilmington and Beaches CVB contacts who were sent the email invitation	42,928 This consists of 38,854 eSpecial subscribers and 4,552 visitor guide requestors minus any invalid email addresses and any duplicate email addresses contained in both lists.
Total number of completed responses from Wilmington and Beaches CVB contacts	2,157, resulting in an estimated response rate of 5.0%
Total number of Wilmington and Beaches CVB contacts surveyed who were recent visitors	1,227 This is 56.9% of all Wilmington and Beaches CVB contacts who completed the survey and 2.9% of Wilmington and Beaches CVB contacts who were sent the email invitation

Note: Complete list of eSpecial subscribers consisted of 105,077 records.

RECENT VISITORS TO WILMINGTON AND BEACHES DESTINATIONS

Of the 1,227 recent visitors, the following went to each key Wilmington and Beaches destination as part of their trip:

891, or 72.6% of recent visitors, went to the City of Wilmington as part of their trip.

760, or 61.9% of recent visitors, went to Carolina Beach as part of their trip.

568, or 46.3% of recent visitors, went to Kure Beach as part of their trip.

506, or 41.2% of recent visitors, went to Wrightsville Beach as part of their trip.

11.5% of recent visitors went to all four destinations as part of their Wilmington and Beaches trip.

Note: The sub-sample sizes of recent visitors to each destination are the raw sample sizes collected, while the percentages of recent visitors to each destination reflect weighted data.

Percent of Recent Visitors who Went to Each Destination as Part of their Wilmington and Beaches Trip

Destination	Percent
City of Wilmington	72.6%
Carolina Beach	61.9%
Kure Beach	46.3%
Wrightsville Beach	41.2%
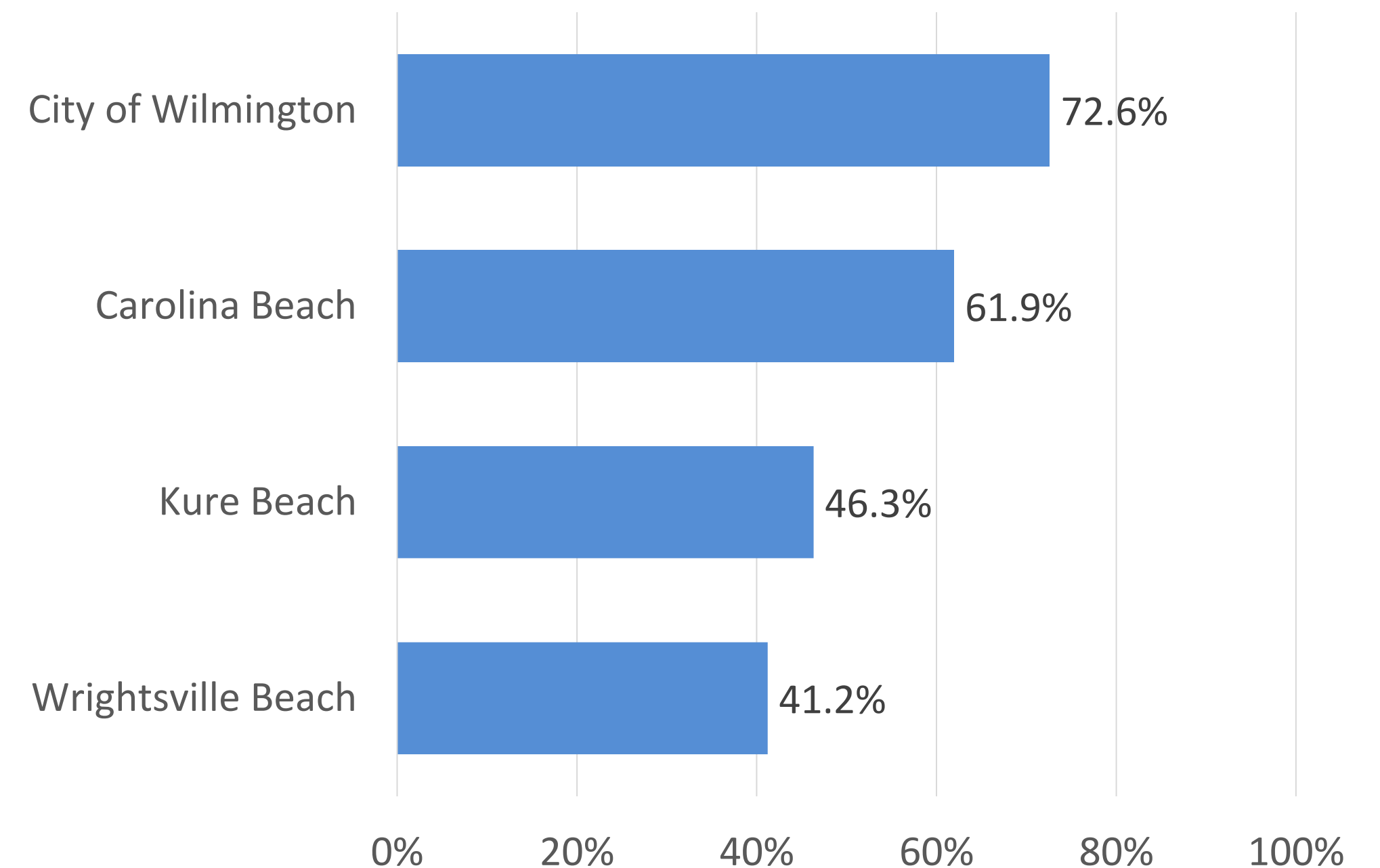
KEY TERMS IN THIS REPORT

The following terms are used in the summaries, analysis, charts and/or data tables within this report.

- **Leisure travelers or Non-residents** – survey respondents who do not reside in New Hanover County, NC.

  - **Recent visitors** – leisure travelers who visited Wilmington and Beaches in the past 12 months.

  - **Lapsed visitors** – leisure travelers who visited Wilmington and Beaches more than 12 months ago.

  - **Non-visitors** – leisure travelers who have never visited Wilmington and Beaches.

  - **Non-recent visitors** – leisure travelers who have not visited Wilmington and Beaches in the past 12 months (or both lapsed visitors and non-visitors).

- **Recent visitors**

  - **In State Visitors** – recent visitors who reside in North Carolina, but outside of New Hanover County, NC.

  - **Out of State Visitors** – recent domestic visitors who reside outside of North Carolina.
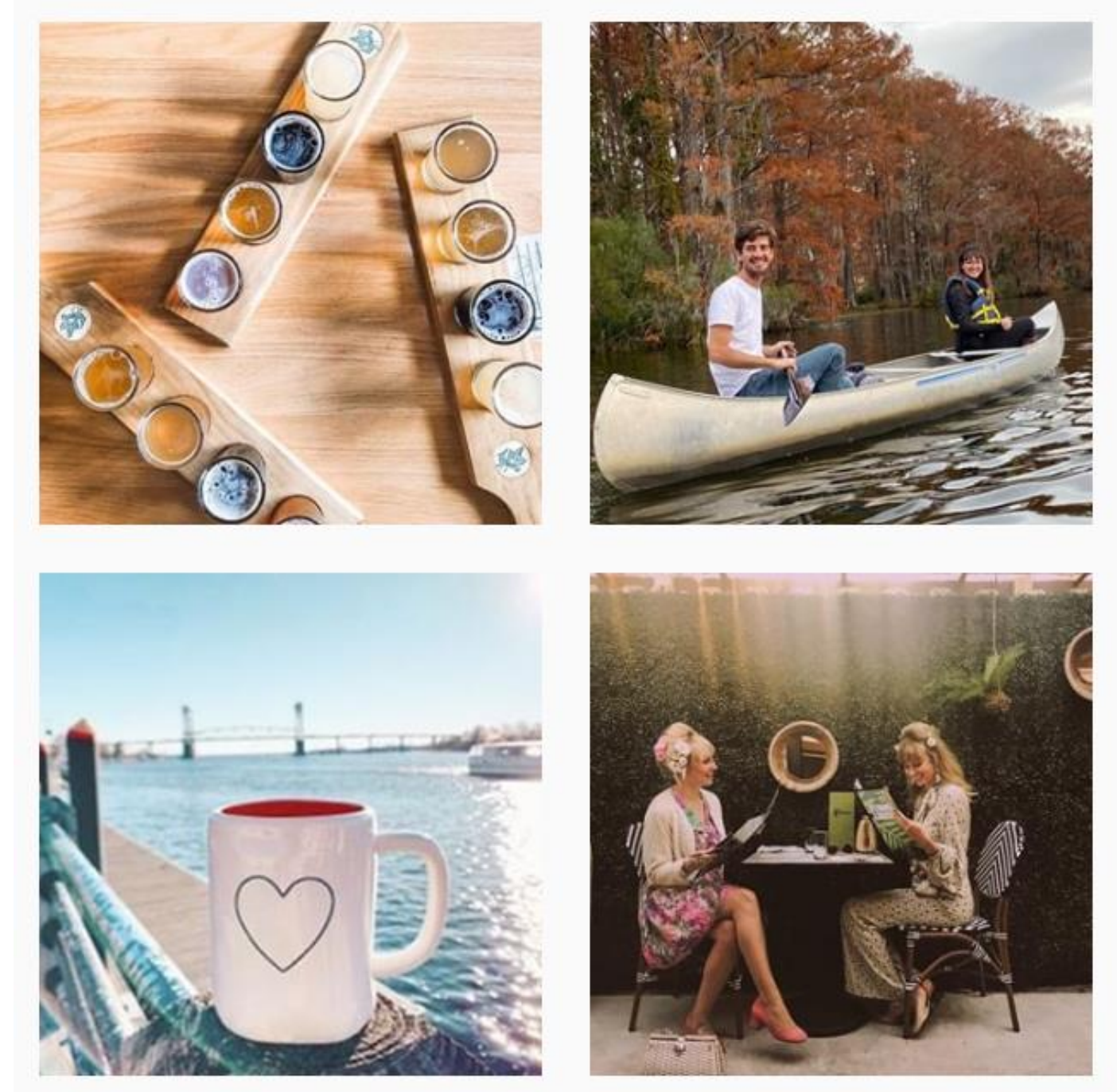
Above: Images of Wilmington and Beaches. Courtesy of instagram.com/wilmingtoncoast

KEY TERMS IN THIS REPORT

- **Recent visitors**

  - **City of Wilmington Visitors** – recent visitors who went to the City of Wilmington as part of their

    trip to Wilmington and Beaches.

  - **Wrightsville Beach Visitors** – recent visitors who went to Wrightsville Beach as part of their trip to

    Wilmington and Beaches.

  - **Carolina Beach Visitors** – recent visitors who went to Carolina Beach as part of their trip to

    Wilmington and Beaches.

  - **Kure Beach Visitors** – recent visitors who went to Kure Beach as part of their trip to Wilmington

    and Beaches.

- **Residents** – survey respondents who live in New Hanover County, NC.
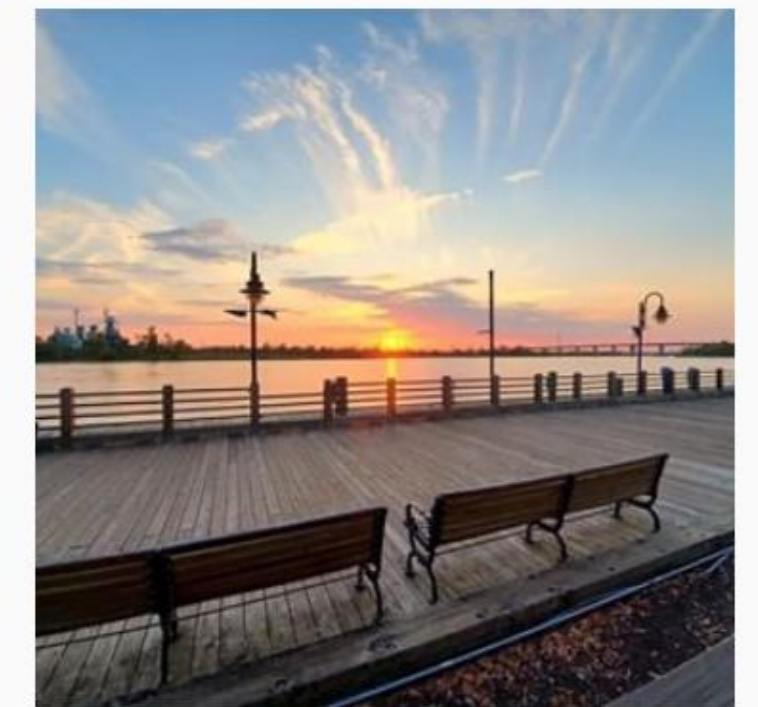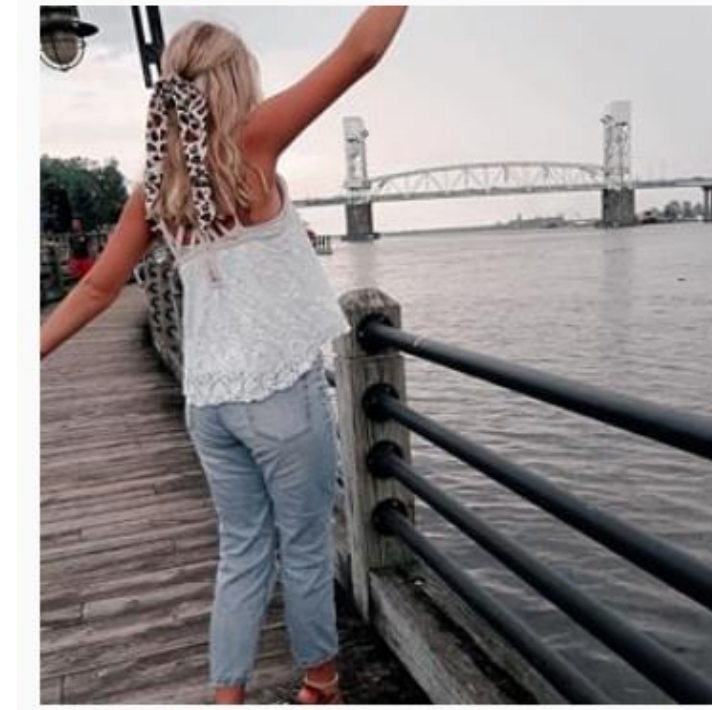
Above: Images of Wilmington and Beaches. Courtesy of instagram.com/wilmingtoncoast

Summary of Wilmington and Beaches Visitor Insights

SUMMARY OF WILMINGTON AND BEACHES VISITOR INSIGHTS

The following are key insights about recent visitors to Wilmington and Beaches.

- **A majority of leisure travelers took a trip to Wilmington and Beaches in the past year.** Approximately two-thirds, 67.3 percent, visited the destination. On average, those who live outside New Hanover County took 2.8 trips to Wilmington and Beaches in the past year.

- **Amongst non-residents who did not take a trip to Wilmington and Beaches in the past year, the majority has previously visited the destination (79.1%).** The remaining 20.9 percent of this segment has never visited Wilmington and Beaches, which is equivalent to 6.4 percent of all non-residents surveyed.

- **The summer months of June, July and August incurred the highest visitation to Wilmington and Beaches amongst recent visitors.**

- **Recent visitors primarily took a vacation or weekend getaway to Wilmington and Beaches.**

- **Recent visitors spent an average of 5.1 days and 4.4 nights in Wilmington and Beaches during their trip.**

- **Approximately 40 percent of recent visitors who stayed overnight in Wilmington and Beaches stayed in Carolina Beach (38.9%).** Following Carolina Beach, City of Wilmington was the most common area of overnight stay (27.0%), while similar percentages of recent visitors stayed overnight in Wrightsville Beach (18.0%) and Kure Beach (16.6%).

- **Recent overnight visitors commonly stayed in a hotel or motel during their trip (48.0%), while 39.8 percent stayed in a vacation or home rental.**

Above: Image of Wilmington and Beaches.
Courtesy of @wilmingtoNCoast

SUMMARY OF WILMINGTON AND BEACHES VISITOR INSIGHTS

- **The typical travel party to Wilmington and Beaches is comprised of 3.6 persons.** This consists of 1.7 females, 1.3 males and 0.6 children on average.

- **The vast majority of recent visitors arrived in Wilmington and Beaches via personal car (90.9%).**

- **The average travel party to Wilmington and Beaches spent $519.41 per day.** This reported daily spending per travel party covered an average of 2.9 visitors. Thus, it is estimated that the average Wilmington and Beaches visitor represents $182.09 in daily in-market spending.

- **About three-fourths of recent visitors reported that they went to the City of Wilmington as part of their trip (72.6%),** followed by 60 percent who went to Carolina Beach (61.9%), and just under half who went to Kure Beach (46.3%) and Wrightsville Beach (41.2%).

- **Visiting the beaches (82.2%), dining (82.0%) and shopping (67.7%) were the top activities that were part of a Wilmington and Beaches trip.**

- **About half of all recent visitors went to the Carolina Beach Boardwalk (51.2%) and the Wilmington Riverwalk & Historic District (48.0%) during their trip to Wilmington and Beaches.** One-third also went to the North Carolina Aquarium at Fort Fisher (34.7%), Fort Fisher State Recreation Area (34.4%) and Kure Beach Fishing Pier (34.2%).

- **General internet search (40.4%) and word-of-mouth (27.9%) were the most common resources used to plan a Wilmington and Beaches trip.** In total, 43.2 percent used at least one official Wilmington and Beaches resource (43.2%).

Above: Image of Wilmington and Beaches.
Courtesy of @wilmingtoNCoast
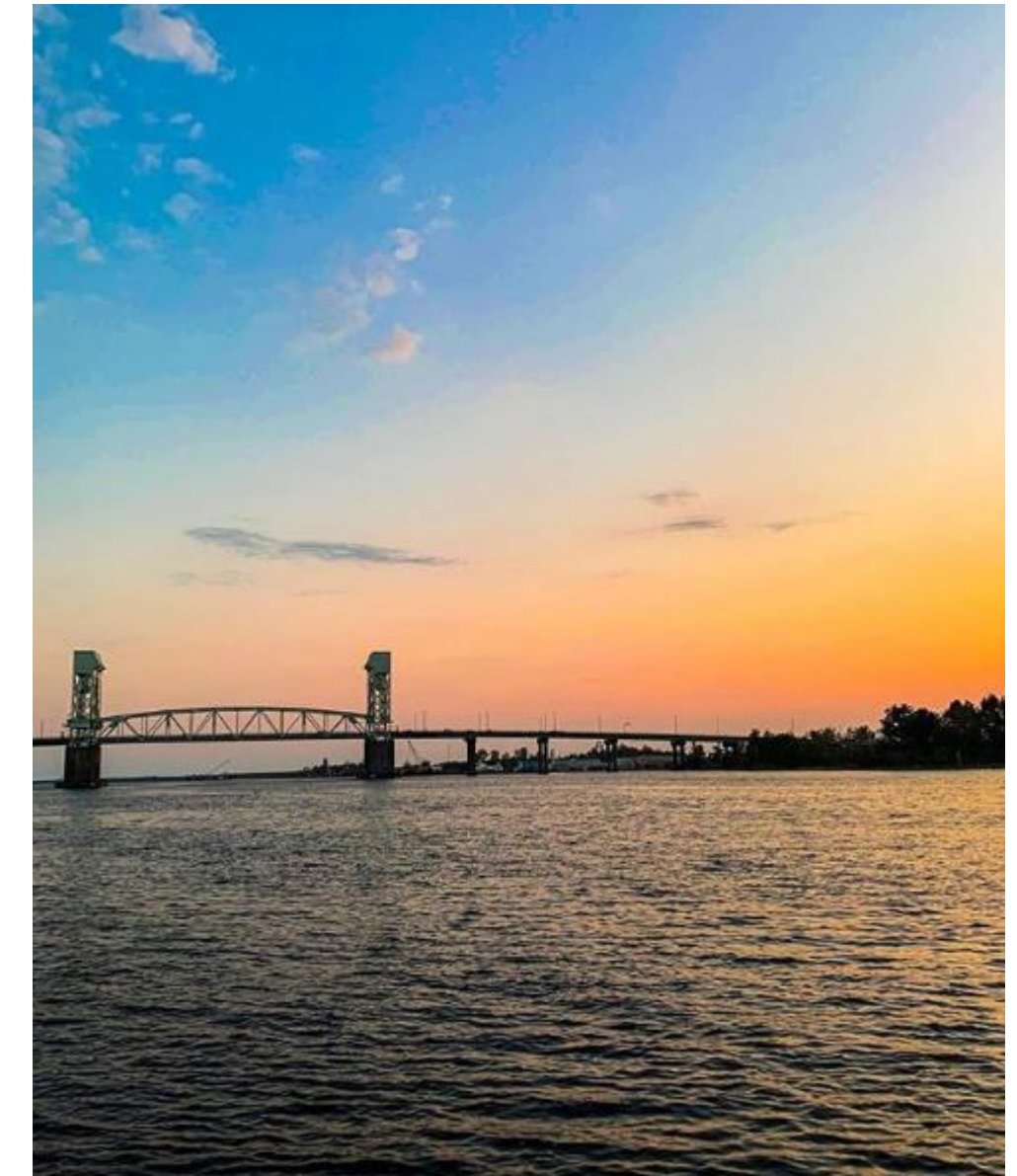
SUMMARY OF WILMINGTON AND BEACHES VISITOR INSIGHTS

- **Relaxation (60.7%), affordability (57.4%) and previous trips to Wilmington and Beaches (56.0%) were the most important factors in deciding to visit the destination.**

- **Parking was the top recommendation for enhancing the visitor experience in Wilmington and Beaches, including better parking (16.1%), free parking (8.9%) and more parking (8.0%).** In addition to suggestions around parking, one-in-ten recent visitors suggested more restaurant/food options (10.7%).

- **The typical recent visitor to Wilmington and Beaches began planning their trip 3.6 weeks in advance.**

- **Recent visitors are highly likely to be repeat visitors, with more than nine-in-ten who have previously been to the destination (91.5%).** On average, recent visitors have taken 14.1 trips to Wilmington and Beaches.

- **Given that the vast majority of recent visitors are repeat visitors, they also have a high likelihood to return to the destination.** Nearly all recent visitors reported being "likely" (9.9%) or "very likely" (84.9%) to return to Wilmington and Beaches.

- **In line with their high likelihood to return, nearly all recent visitors were "satisfied" (24.5%) or "very satisfied" (71.0%) with their visitor experience in Wilmington and Beaches.** Recent visitors who reported being satisfied or very satisfied with their experience reported that the reasons for their level of satisfaction were the relaxing experience, quality of restaurants, friendly locals, beaches, and the beauty of the area, each written in by one-tenth or more of satisfied visitors.

Above: Image of Wilmington and Beaches.
Courtesy of @wilmingtoNCoast

Summary of Key Recommendations

SUMMARY OF KEY RECOMMENDATIONS

The following recommendations emerged from the Wilmington and Beaches Visitor Profile & Expenditure Study.

- As seen in Destination Analysts' syndicated research *The State of the American Traveler*™ as well as other custom destination research conducted, word-of-mouth recommendations from friends and family is one of the top resources for trip planning. **Given this, as well as recent visitors' high likelihood to recommend Wilmington and Beaches to others, encouraging recent visitors to recommend the destination to others may boost overall awareness and consideration of Wilmington and Beaches.**

- **Consider highlighting opportunities for relaxation and the ease of getting to Wilmington and Beaches in marketing messaging.** When appropriate and applicable, communication around affordability may demonstrate to travelers that experiences within the destination are affordable. Relaxation, the ease of getting to Wilmington and affordability were most important to recent visitors in making the decision to ultimately take a trip to Wilmington and Beaches. In addition, one-quarter of non-recent visitors cited "too far from home" as a deterrent to visiting.

SUMMARY OF KEY RECOMMENDATIONS

- **Marketing around the quality of beaches, affordability and parking can also drive consumer perceptions about the destination and boost Wilmington and Beaches' ratings for these attributes.** While the City of Wilmington and the three beaches perform well for signage and special events, these attributes are relatively less important when considering coastal destination in the Southeast. Although quality of beaches, lodging options and affordability are the attributes that are most important in selecting coastal Southeast destinations, the areas within Wilmington and Beaches were rated lower than the relative importance of these attributes.

- Communication around parking may likely satisfy recent visitors. Parking was the top recommendation for enhancing the visitor experience in Wilmington and Beaches, including better parking, free parking and more parking. Furthermore, a quarter of recent visitors who were unsatisfied with their experience attributed their level of satisfaction to "lack of parking" and about one-in-five recent visitors cited "not enough parking" as a factor that keeps them from visiting Wilmington and Beaches. **Addressing the parking situation may positively affect satisfaction with the Wilmington and Beaches experience, help visitors in their trip planning and/or shift perceptions of parking in the destination.**

SUMMARY OF KEY RECOMMENDATIONS

- While the majority of the deterrents to visiting Wilmington and Beaches in the Fall and Winter are factors that can't be directly controlled by destination marketing (e.g., weather, personal preference to visit in the Summer, limited vacation time, etc.), **highlighting the destination's assets and experiences unique to the Fall and Winter may help generate interest in visiting during these seasons.**

- **There's an opportunity to learn from and about other types of travelers, particularly those who have yet to visit Wilmington and Beaches, as well as visitors who are not engaged with the CVB.** Given that consumer perceptions of those who are not engaged with the CVB and of travelers who have not visited the destination will likely be different from the CVB's owned audiences, understanding the opinions and sentiments of others could be effective in moving the needle. Studying and identifying the traveler segments that most align with the Wilmington and Beaches destination brand and thus have the greatest potential to visit the destination could ultimately contribute to the positive economic impact of tourism to Wilmington and Beaches.

PROFILE SUMMARIES

RECENT VISITORS

**Leisure travelers who visited
Wilmington and Beaches in the past 12 months.**

1,227 completed surveys.

KEY CHARACTERISTICS

- On average, they're 59.1 years of age and have an annual household income of $104,477. Three-quarters are married/partnered (77.0%) and 15 percent have children under the age of 18 (15.5%).

- The majority of recent visitors are repeat visitors (91.5%) who have traveled to the destination an average of 14.1 times.

- Amongst the four destinations, they rated the City of Wilmington the highest for restaurants, good past experience and things to see and do for, each rated "good" or "very good" by 85 percent or more of recent visitors.

- They primarily visited Wilmington and Beaches for leisure purposes, either a vacation (46.9%) or a weekend getaway (24.3%).

- On average, they spent 5.1 days and 4.4 nights in Wilmington and Beaches.

- Carolina Beach was the most common area of overnight stay (38.9%) and half stayed in a hotel or motel (48.0%).

- They take advantage of Wilmington and Beaches' natural assets, with over 80 percent who visited the beaches (82.2%).

- Relaxation (60.7%), affordability (57.4%) and the desire to return (56.0%) were important to their decision to visit Wilmington and Beaches.

- They are highly likely to recommend Wilmington and Beaches as a place to visit for leisure (94.8%) and were satisfied with their visitor experience (95.6%).

RECENT VISITORS *Profile*

Demographic Profile
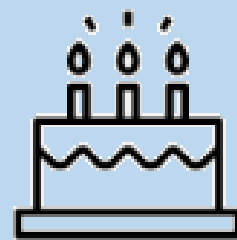
AGE

Mean = 59.1

GENDER

Female – 67.5%
Male – 30.9%
Other – 0.1%

ANNUAL HOUSEHOLD INCOME

Mean = $104,477

MARITAL STATUS

Married – 77.0%
Single – 16.4%
Have Children Under 18 – 15.5%

Destination Attribute Rating

(Percent rating each attribute as "good" or "very good")

	City of Wilmington	Wrightsville Beach	Carolina Beach	Kure Beach
Quality of Beach	--	78.2%	83.5%	76.0%
Beach amenities	--	61.3%	71.6%	57.9%
Restaurants	90.4%	69.6%	78.2%	59.7%
Good past experience in the destination	88.7%	67.8%	81.8%	73.4%
Things to see and do	85.6%	58.8%	73.5%	57.8%
Overall ease of access	78.4%	58.6%	74.7%	67.3%
Lodging options	70.2%	53.6%	66.1%	47.9%
Affordability/cost	69.8%	45.4%	69.5%	59.8%
Signage	69.4%	52.0%	60.3%	53.0%
Special events/festivals	64.5%	42.4%	54.7%	39.9%
Parking	56.2%	36.3%	48.0%	47.4%
Traffic	49.9%	39.8%	51.7%	57.2%

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Familiarity with Each Destination
(Percent who are "familiar" or "very familiar")

Destination	Percent
City of Wilmington	90.5%
Carolina Beach	82.3%
Kure Beach	69.4%
Wrightsville Beach	67.7%
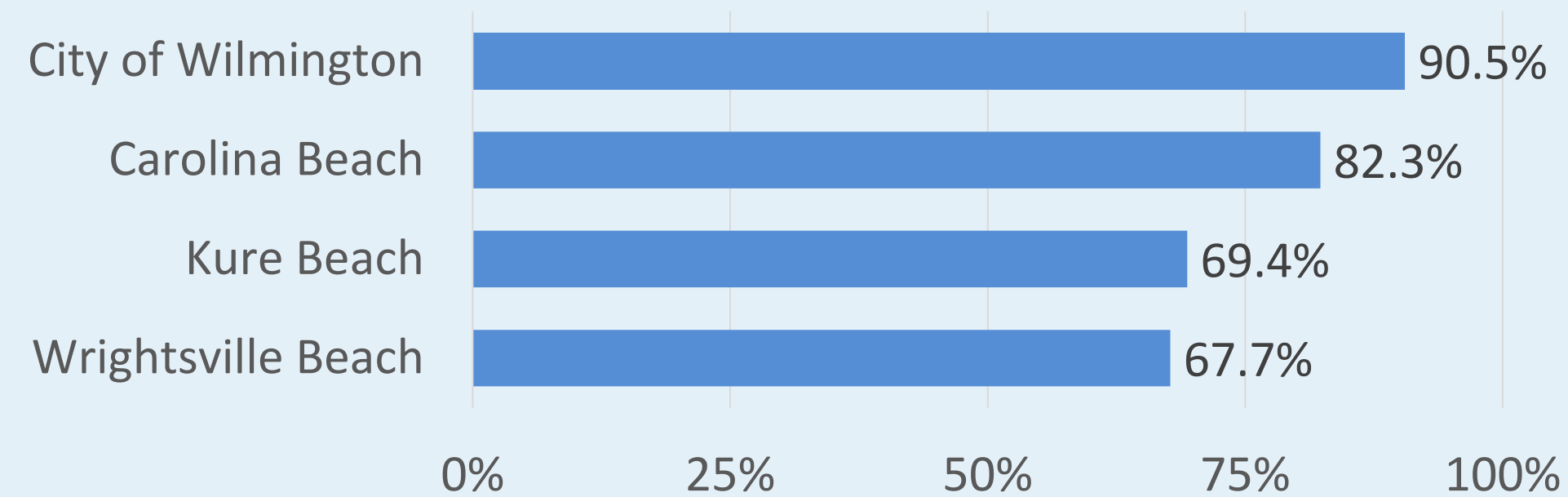
Days & Nights Spent in Wilmington and Beaches

5.1 DAYS
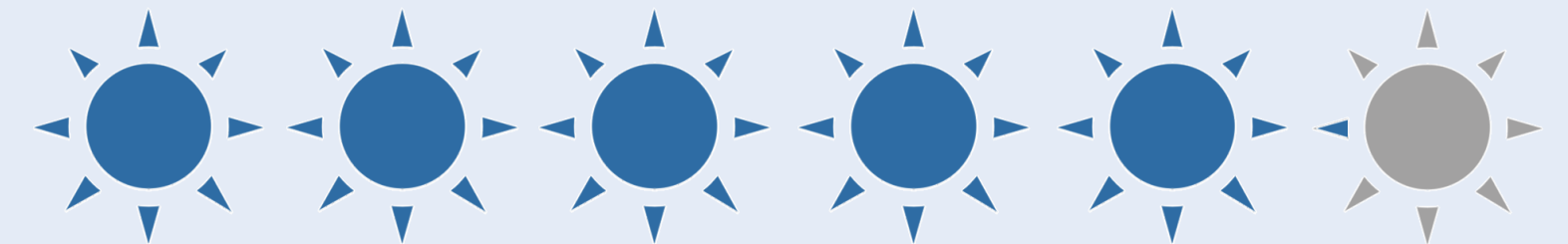
4.4 NIGHTS

Likelihood to Recommend Wilmington and Beaches as a Place to Visit for Leisure

95.9%

Percent answering 6-10 on 11-Point Scale

Primary Reason for Trip to Wilmington and Beaches

Reason	Percent
Vacation	46.9%
Weekend getaway	24.3%
Visit friends/family	9.0%

Area of Overnight Stay

Area	Percent
Carolina Beach	38.9%
City of Wilmington	27.0%
Wrightsville Beach	18.0%
Kure Beach	16.6%
Did not stay overnight in Wilmington and Beaches	7.0%

Lodging Type

Type	Percent
Hotel or motel	48.0%
Vacation or home rental	39.8%
Private residence of friend/family member	4.6%
Bed & breakfasts/inns	1.7%
Other	10.6%

Average Travel Party Size

3.6
Travelers

Average Spending Per Day

$519
Per Travel Party

RECENT VISITORS *Profile* (continued)

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Wilmington and Beaches Destinations Visited

Destination	Percentage
City of Wilmington	72.6%
Carolina Beach	61.9%
Kure Beach	46.3%
Wrightsville Beach	41.2%
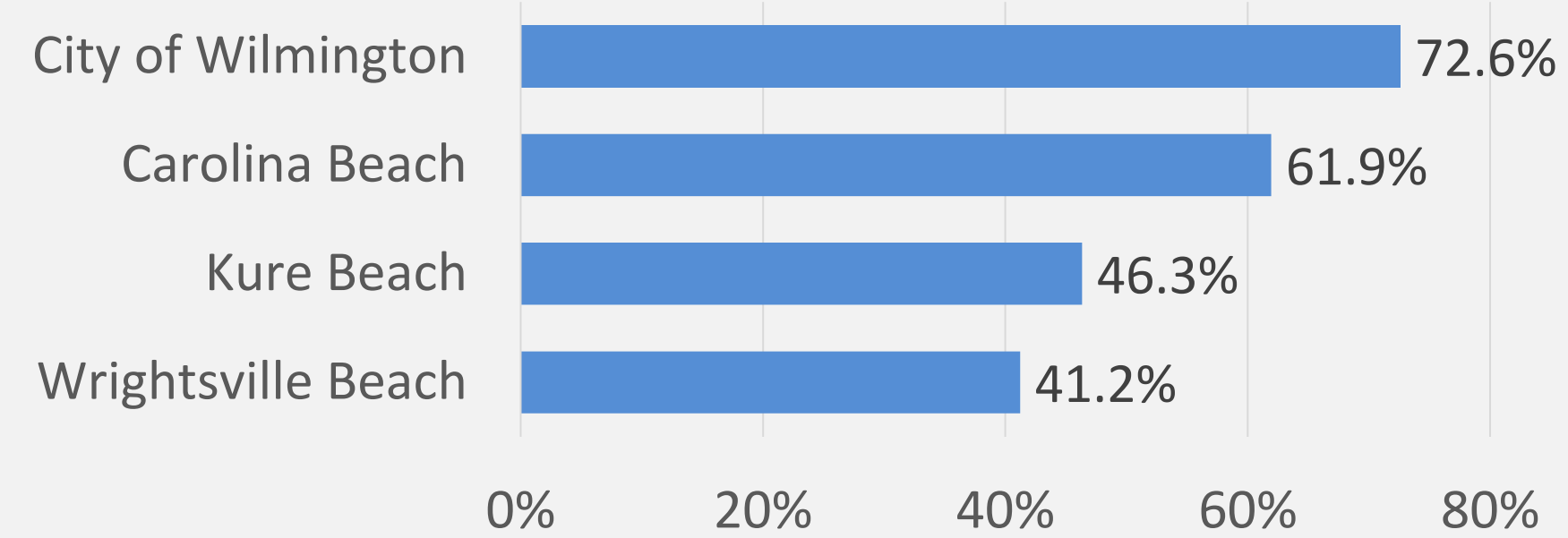
Motivators Important to Visiting Wilmington and Beaches

Motivator	Percentage
Relaxation	60.7%
Affordability/cost	57.4%
Visited Wilmington and Beaches before and wanted to return	56.0%
Easy to get to	44.1%
Overall ambiance and atmosphere	41.6%
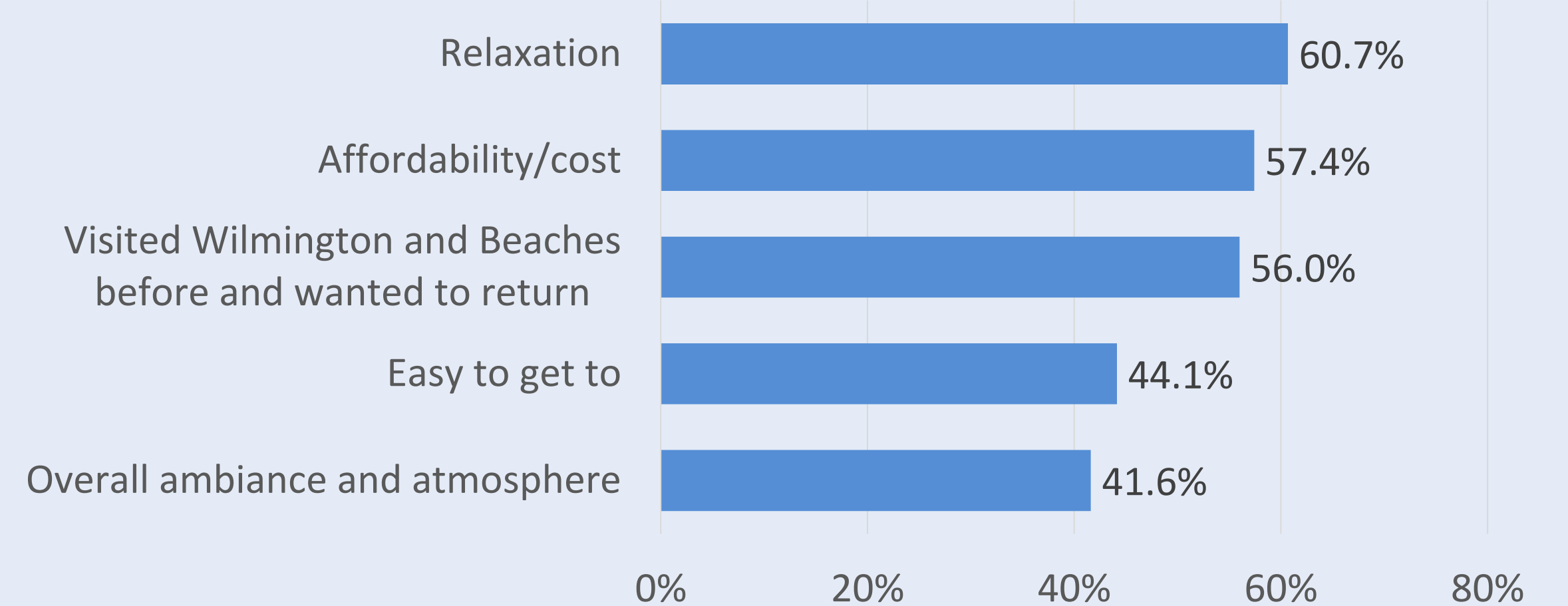
Top Wilmington and Beaches Activities
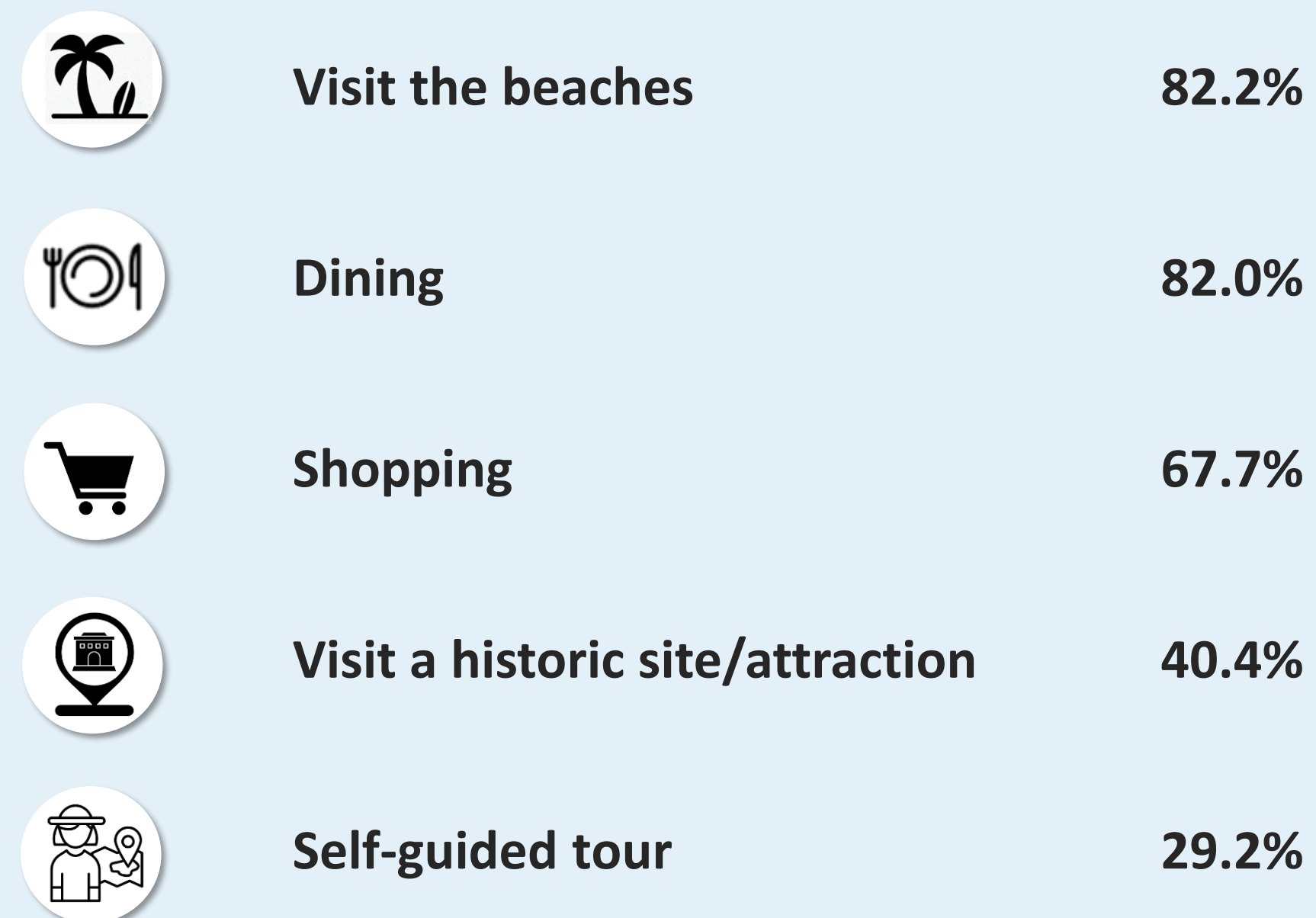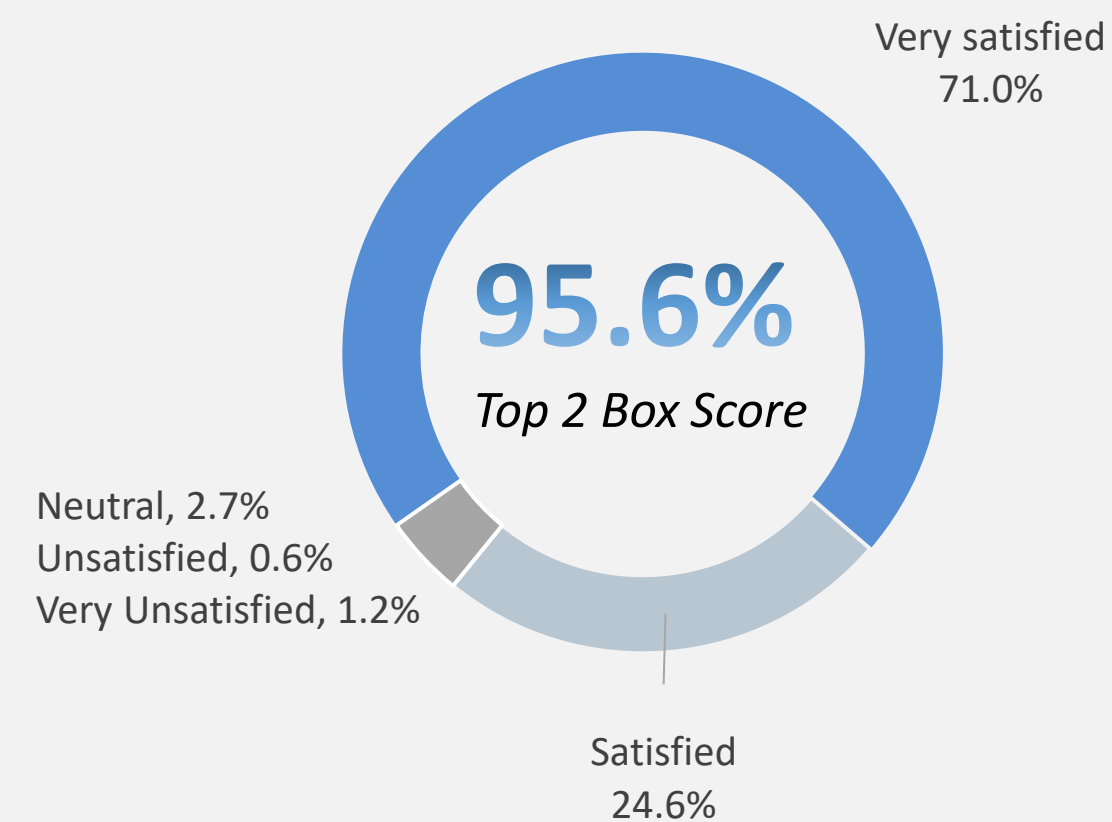
Activity	Percentage
Visit the beaches	82.2%
Dining	82.0%
Shopping	67.7%
Visit a historic site/attraction	40.4%
Self-guided tour	29.2%

Satisfaction with Visitor Experience in Wilmington and Beaches

95.6%
Top 2 Box Score

Very satisfied 71.0%
Satisfied 24.6%
Neutral, 2.7%
Unsatisfied, 0.6%
Very Unsatisfied, 1.2%

Likelihood to Return to Wilmington and Beaches

94.8%
Top 2 Box Score

Very likely 84.9%
Likely 9.9%
Neutral, 2.5%
Unlikely, 0.6%
Very Unlikely, 2.1%

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Deterrents to Visiting Wilmington and Beaches

Lack of personal vacation time	20.2%
Not enough parking	17.3%
Too far from home	16.2%
Personal financial reasons	14.5%
Too expensive	12.9%
Traffic	11.1%
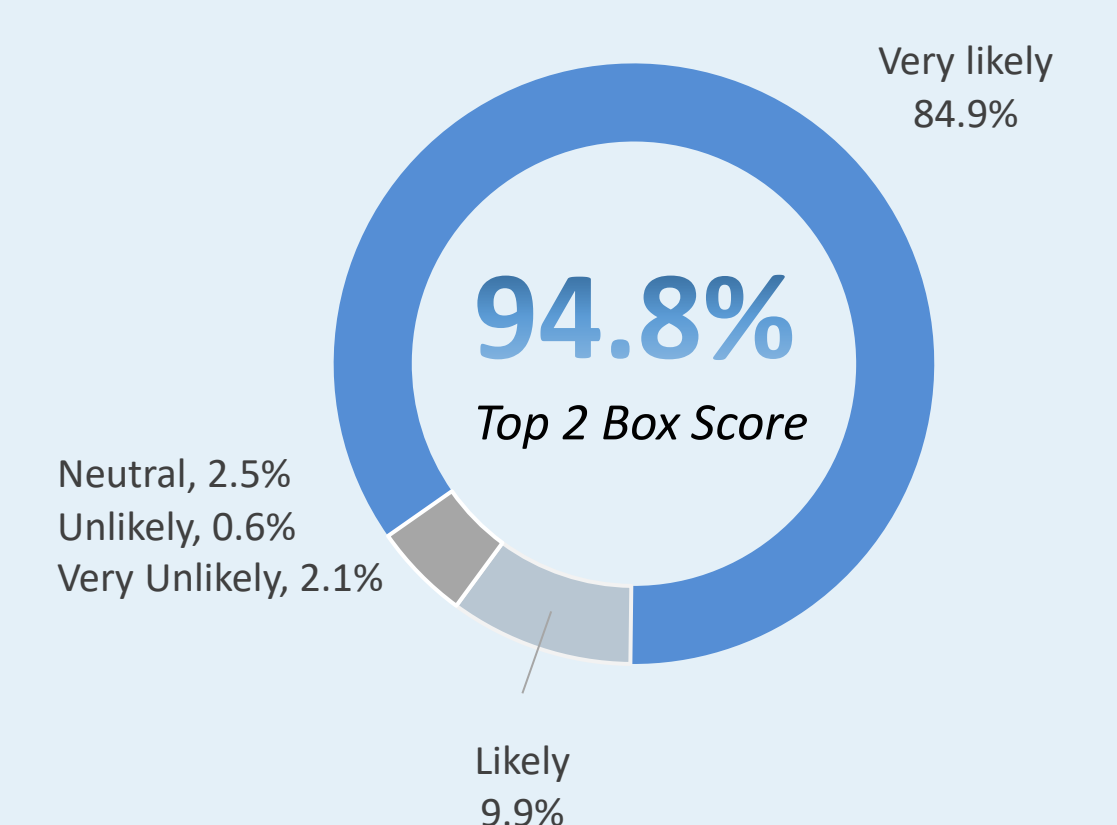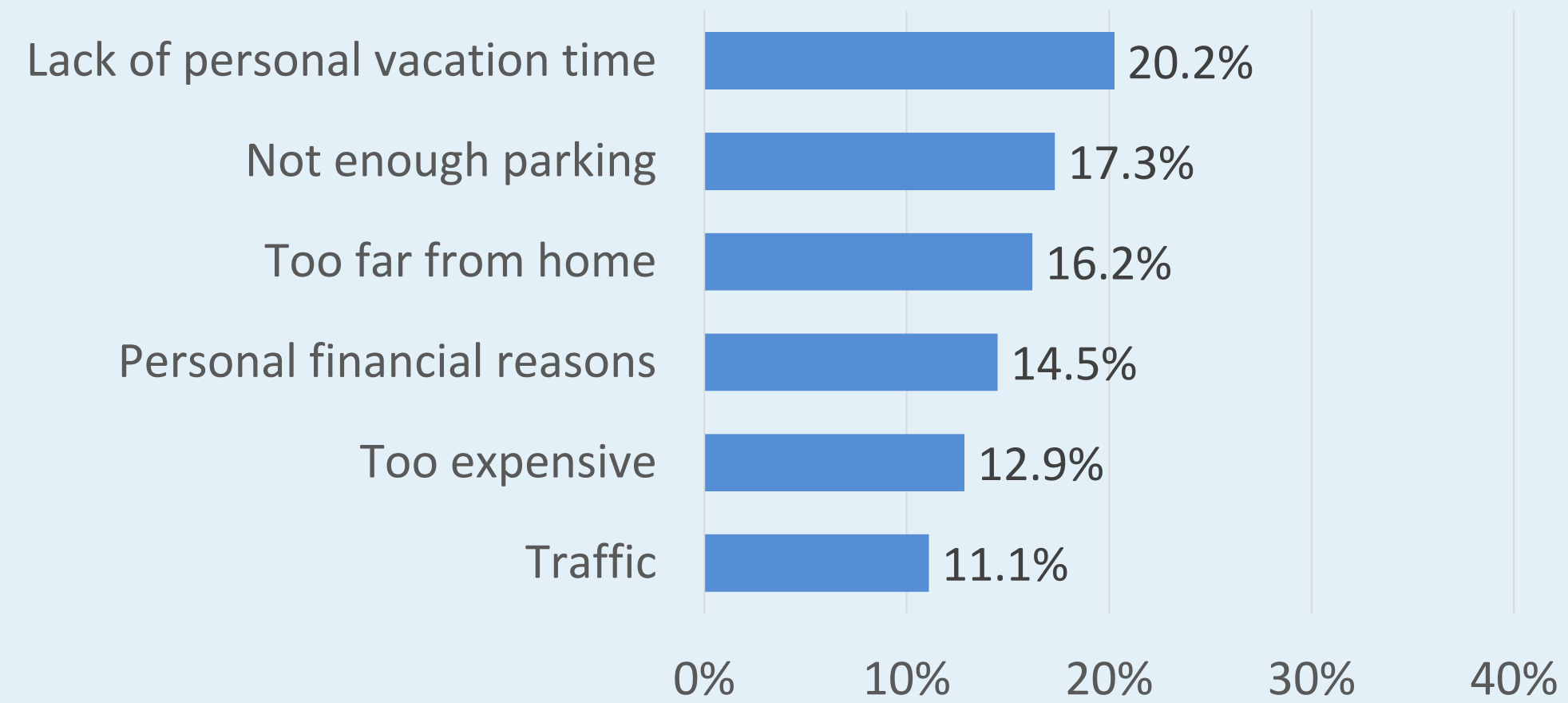
Top Resources to Plan Trip to Wilmington and Beaches

General internet search	40.4%
Friends/family members	27.9%
The official tourism website, WilmingtonandBeaches.com	23.8%
The official Wilmington and Beaches visitors guide (print version)	20.7%

Deterrents to Visiting Wilmington and Beaches in the Fall and Winter

Weather	27.9%
Work – limited vacation time	23.6%
I prefer visiting in the summer	23.4%

Coronavirus Statement Agreement*
(Percent who "agree" or "strongly agree")

I will be unlikely to travel outside the United States until the Coronavirus situation is resolved	83.0%
I will be unlikely to attend any conferences or conventions until the Coronavirus situation is resolved	74.7%
I'm planning to avoid all travel until the Coronavirus situation blows over	60.7%
Because of the Coronavirus, I'll probably be taking more road trips this year to avoid airline travel	52.5%

Note: Survey data was collected at the onset of COVID-19 between April 6 – May 31, 2020.

NON-RECENT VISITORS

Leisure travelers who have not visited Wilmington and Beaches in the past 12 months.

586 completed surveys.

KEY CHARACTERISTICS

- On average, they're 59.3 years of age and have an annual household income of $88,961. Nearly three-quarters are married/partnered and over one-in-five have children under the age of 18.

- They are most familiar with the City of Wilmington (69.2%).

- About half view Wilmington and Beaches as four unique destinations with distinct identities (48.9%), while 40 percent perceive it as one destination with Wilmington as the anchor city (39.6%). Meanwhile, a larger proportion of recent visitors, 63.1 percent, consider Wilmington and Beaches to be four unique destinations with distinct identifies and a slightly smaller 34.2 percent of recent visitors see it as one destination.

- They are highly likely to recommend Wilmington and Beaches as a place to visit for leisure (90.7%).

- The top deterrents to visiting the destination include "personal financial reasons" (25.2%), "too far from home" (24.3%) and "lack of personal vacation time" (23.5%).

- Over a quarter prefer visiting Wilmington and Beaches in the Summer (28.0%) rather than the Fall and Winter.

NON-RECENT VISITORS *Profile*

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Demographic Profile
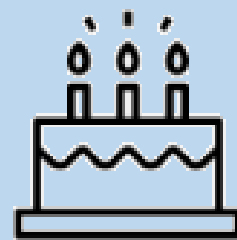
AGE

Mean = 59.3
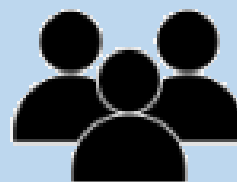
GENDER

Female – 67.9%
Male – 31.7%
Other – 0.0%

ANNUAL HOUSEHOLD INCOME

Mean = $88,961

MARITAL STATUS

Married – 70.7%
Single – 22.8%
Have Children Under 18 – 17.4%

Destination Attribute Rating
(Percent rating each attribute as "good" or "very good")

	City of Wilmington	Wrightsville Beach	Carolina Beach	Kure Beach
Quality of Beach	--	73.7%	76.7%	65.3%
Beach amenities	--	61.0%	65.5%	55.4%
Restaurants	81.7%	66.0%	67.7%	55.4%
Good past experience in the destination	77.1%	62.7%	67.5%	56.3%
Things to see and do	82.5%	60.8%	66.6%	54.3%
Overall ease of access	72.9%	62.9%	68.1%	58.2%
Lodging options	69.4%	57.5%	61.4%	47.9%
Affordability/cost	64.9%	55.6%	60.3%	52.4%
Signage	59.3%	48.5%	53.2%	45.0%
Special events/festivals	56.2%	40.3%	45.3%	35.3%
Parking	56.3%	46.1%	53.7%	47.9%
Traffic	52.1%	47.0%	50.2%	48.7%

Familiarity with Each Destination
(Percent who are "familiar" or "very familiar")
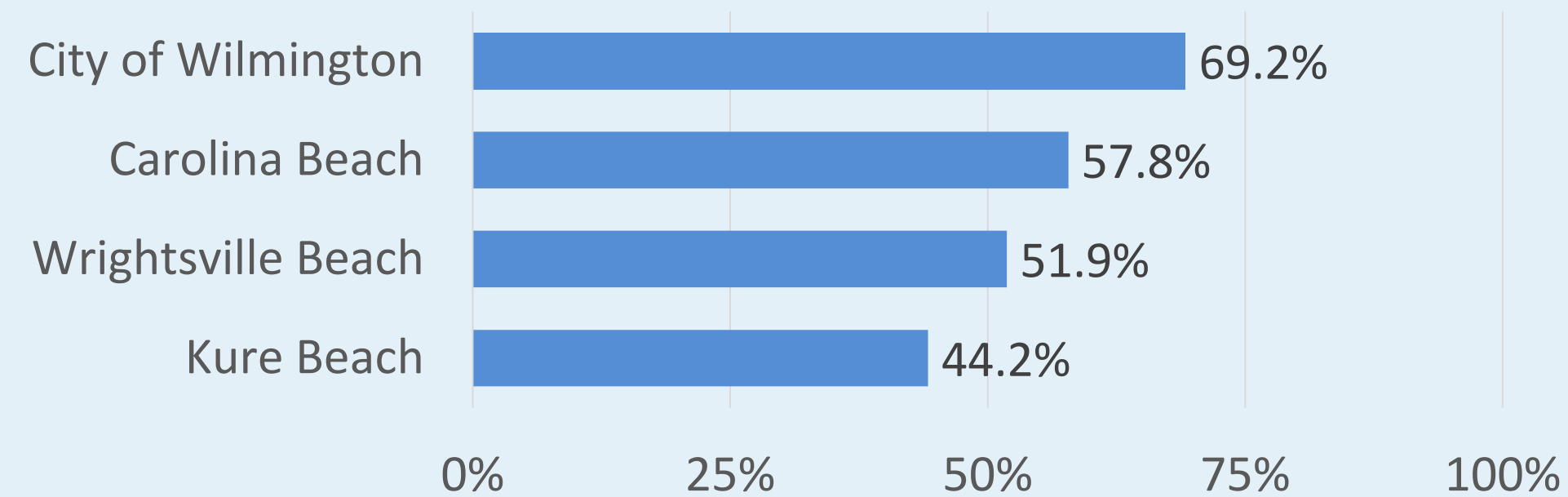
Destination	%
City of Wilmington	69.2%
Carolina Beach	57.8%
Wrightsville Beach	51.9%
Kure Beach	44.2%
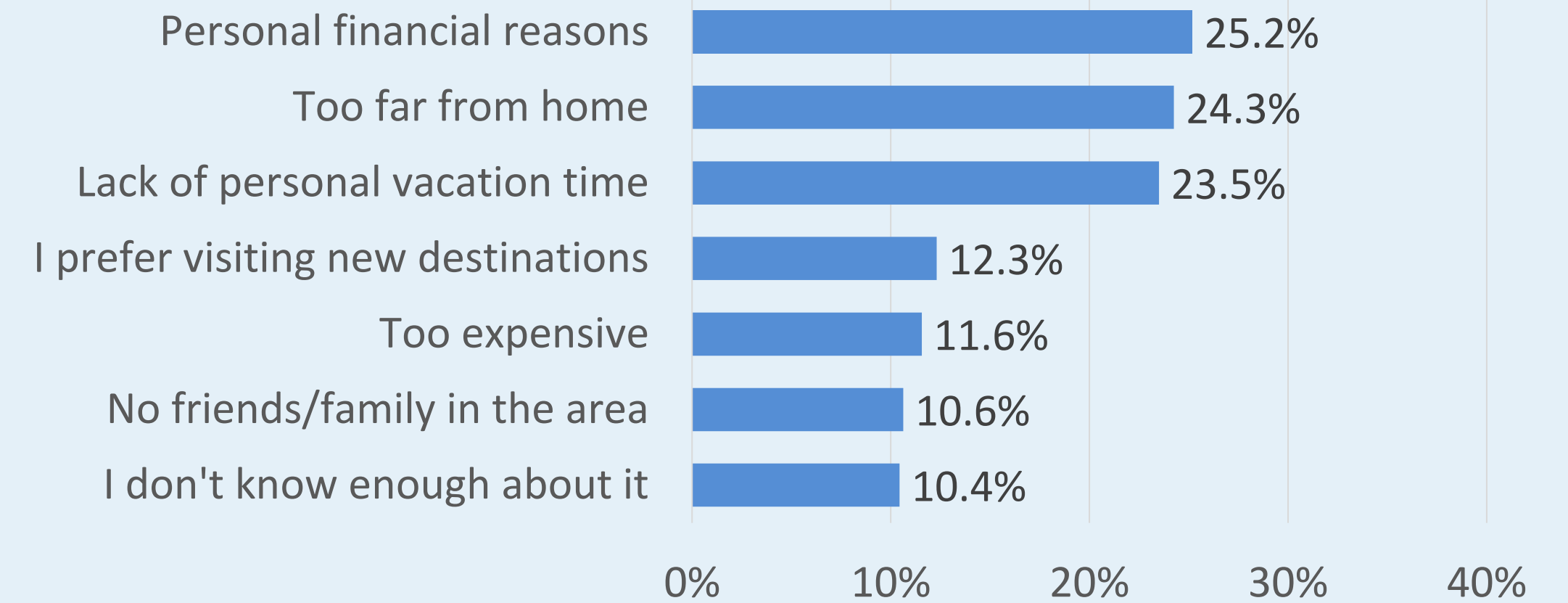
Likelihood to Recommend Wilmington and Beaches as a Place to Visit for Leisure

90.7%

Percent answering 6-10 on 11-Point Scale
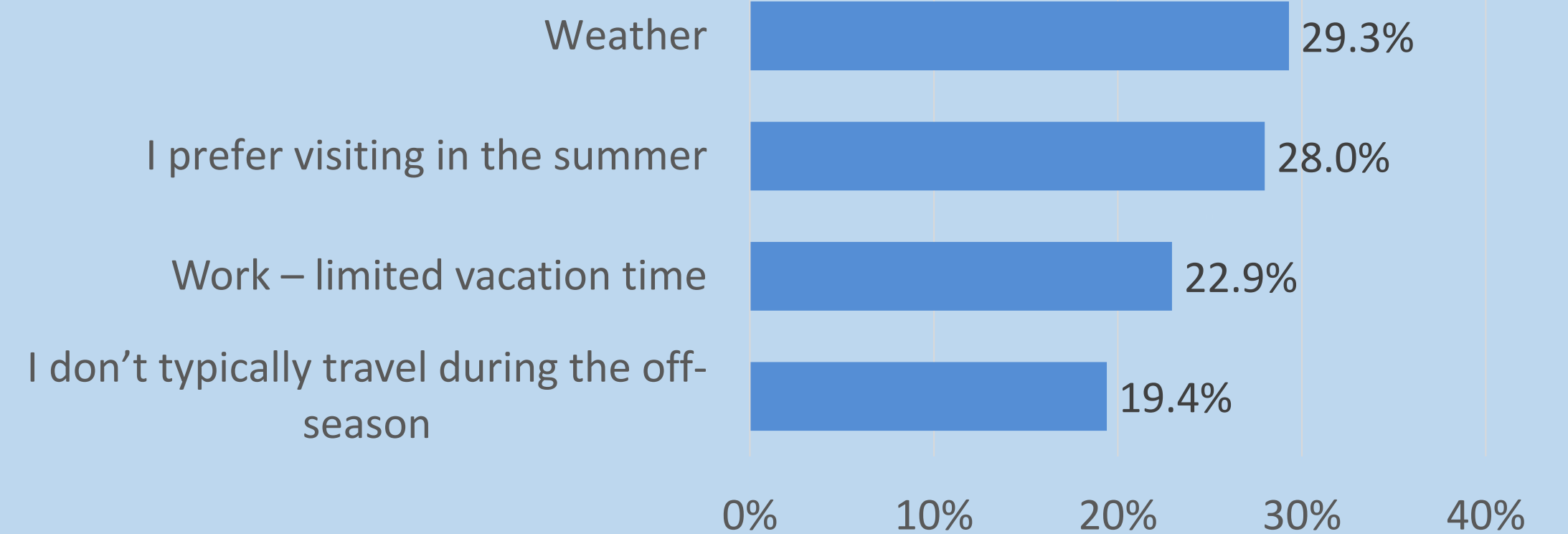
Perception of Wilmington and Beaches as a Destination

	%
Four unique destinations with distinct identities	48.9%
One destination with Wilmington as the anchor city	39.6%
I don't know	11.6%

Deterrents to Visiting Wilmington and Beaches

	%
Personal financial reasons	25.2%
Too far from home	24.3%
Lack of personal vacation time	23.5%
I prefer visiting new destinations	12.3%
Too expensive	11.6%
No friends/family in the area	10.6%
I don't know enough about it	10.4%

Deterrents to Visiting Wilmington and Beaches in the Fall and Winter

	%
Weather	29.3%
I prefer visiting in the summer	28.0%
Work – limited vacation time	22.9%
I don't typically travel during the off-season	19.4%

Coronavirus Statement Agreement*
(Percent who "agree" or "strongly agree")

Statement	Percent
I will be unlikely to travel outside the United States until the Coronavirus situation is resolved	85.3%
I will be unlikely to attend any conferences or conventions until the Coronavirus situation is resolved	81.9%
I'm planning to avoid all travel until the Coronavirus situation blows over	70.9%
Because of the Coronavirus, I'll probably be taking more road trips this year to avoid airline travel	54.3%
Because of the Coronavirus, I'll probably be taking more regional trips (near my home) and avoid long-haul travel (further from home)	48.1%
Travel discounts and price cuts (airline, hotel, etc.) make me more interested in traveling in the NEXT THREE (3) MONTHS	44.0%
Because of the Coronavirus, I'll probably take a staycation(s) this summer rather than a vacation(s)	42.0%
I expect the Coronavirus situation will be resolved before the summer travel season	28.4%
I still feel comfortable going out in my community to restaurants, local attractions and undertaking local activities	22.8%

*Note: Survey data was collected at the onset of COVID-19 between April 6 – May 31, 2020.

Detailed Survey Findings

Visitation to Wilmington and Beaches

A majority of leisure travelers took a trip to Wilmington and Beaches in the past year. Approximately two-thirds, 67.3 percent, visited the destination. On average, those who live outside New Hanover County took 2.8 trips to Wilmington and Beaches in the past year.

Figure 1: Trips to Wilmington and Beaches in the Past Year

Trips	Percent
9 or more	7.9%
8	0.9%
7	0.7%
6	3.6%
5	3.0%
4	4.4%
3	5.9%
2	14.0%
1	26.7%
0	32.7%

Mean = 2.8
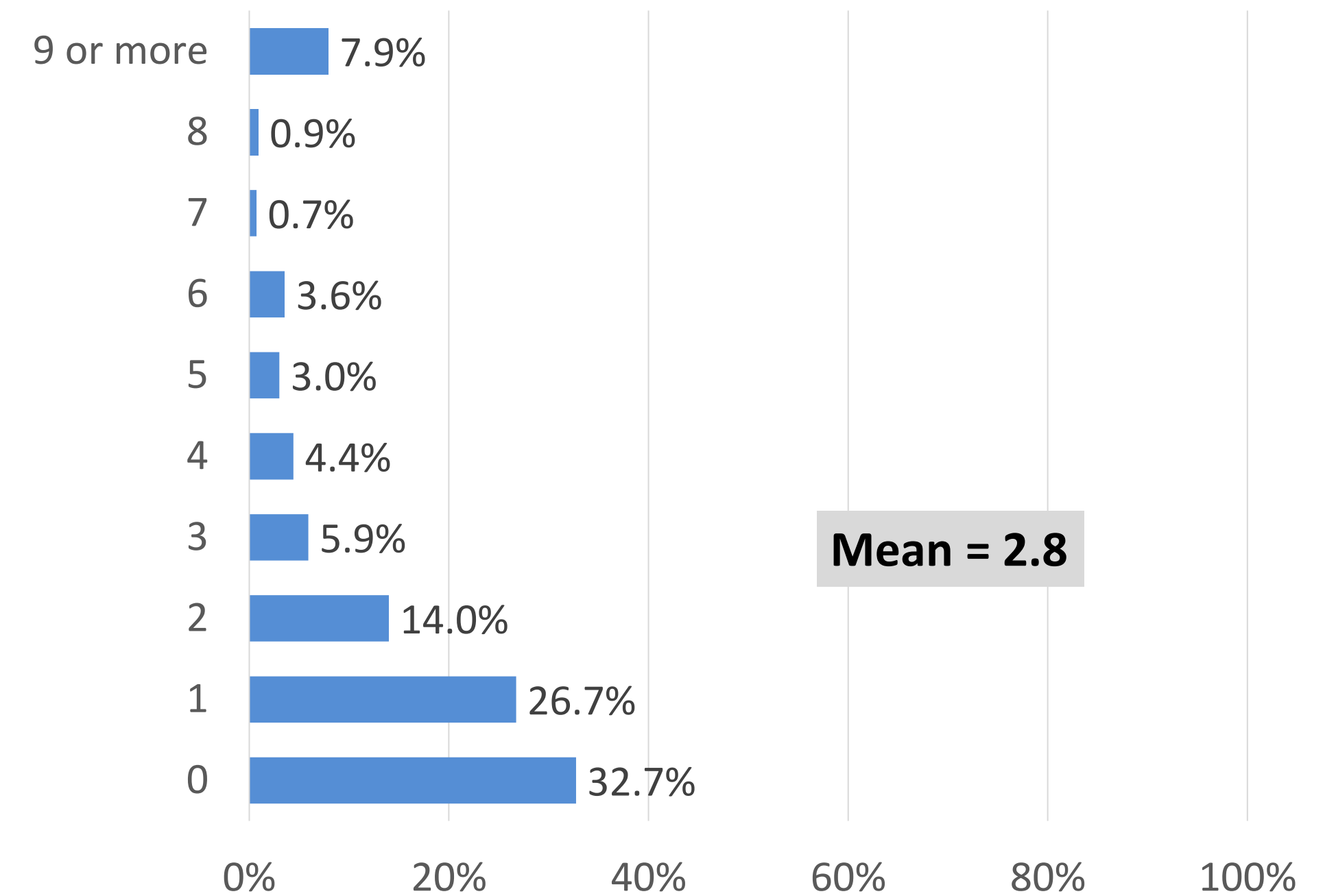
Question: How many trips to Wilmington and Beaches have you taken in the past twelve months?
Base: All non-residents. 1,763 completed surveys.

Amongst non-residents who did not take a trip to Wilmington and Beaches in the past year, the majority has previously visited the destination (79.1%). The remaining 20.9 percent of this segment has never visited Wilmington and Beaches, which is equivalent to 6.4 percent of all non-residents surveyed.

Figure 2: Past Visits to Wilmington and Beaches

No
20.9%

Yes
79.1%
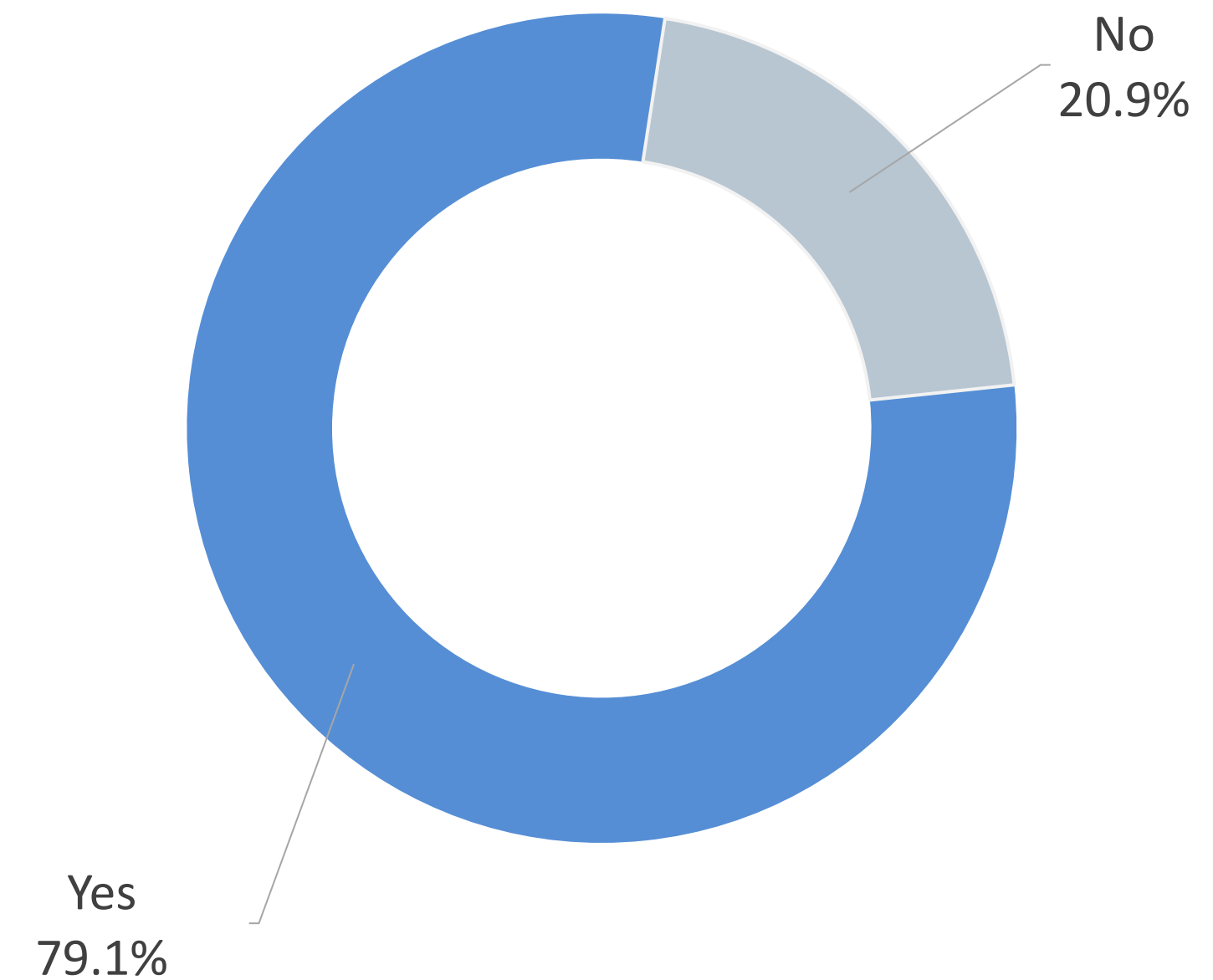
Question: Have you ever visited Wilmington and Beaches? (Select one)
Base: Non-residents who did not visit Wilmington and Beaches in the past 12 months.
536 completed surveys.

Wilmington and Beaches Visitors

MONTH OF TRIP

The summer months of June, July and August incurred the highest visitation to Wilmington and Beaches amongst recent visitors. Recent visitors to Wilmington and Beaches, or those who took a trip to the destination within the past year, were asked a series of questions about their trip. The first of these was the month of their trip. About 40 percent of recent visitors came in Summer 2019 (38.8%), while a quarter came in Spring 2019 (27.0%) and one-in-five visited during Fall 2019 (21.3%). About one-in-ten recent visitors took a trip to Wilmington and Beaches in Winter 2019-2020 (12.9%).

Figure 3: Month of Trip

Month	Percentage
March 2019	5.0%
April 2019	4.5%
May 2019	9.9%
June 2019	11.8%
July 2019	13.6%
August 2019	13.4%
September 2019	7.8%
October 2019	9.2%
November 2019	4.3%
December 2019	3.8%
January 2020	3.1%
February 2020	6.0%
March 2020	7.6%

Spring 2019 (March to May) = 19.3%
Summer 2019 (June to August) = 38.8%
Fall 2019 (September to November) = 21.3%
Winter 2019 – 2020 (December to February) = 12.9%
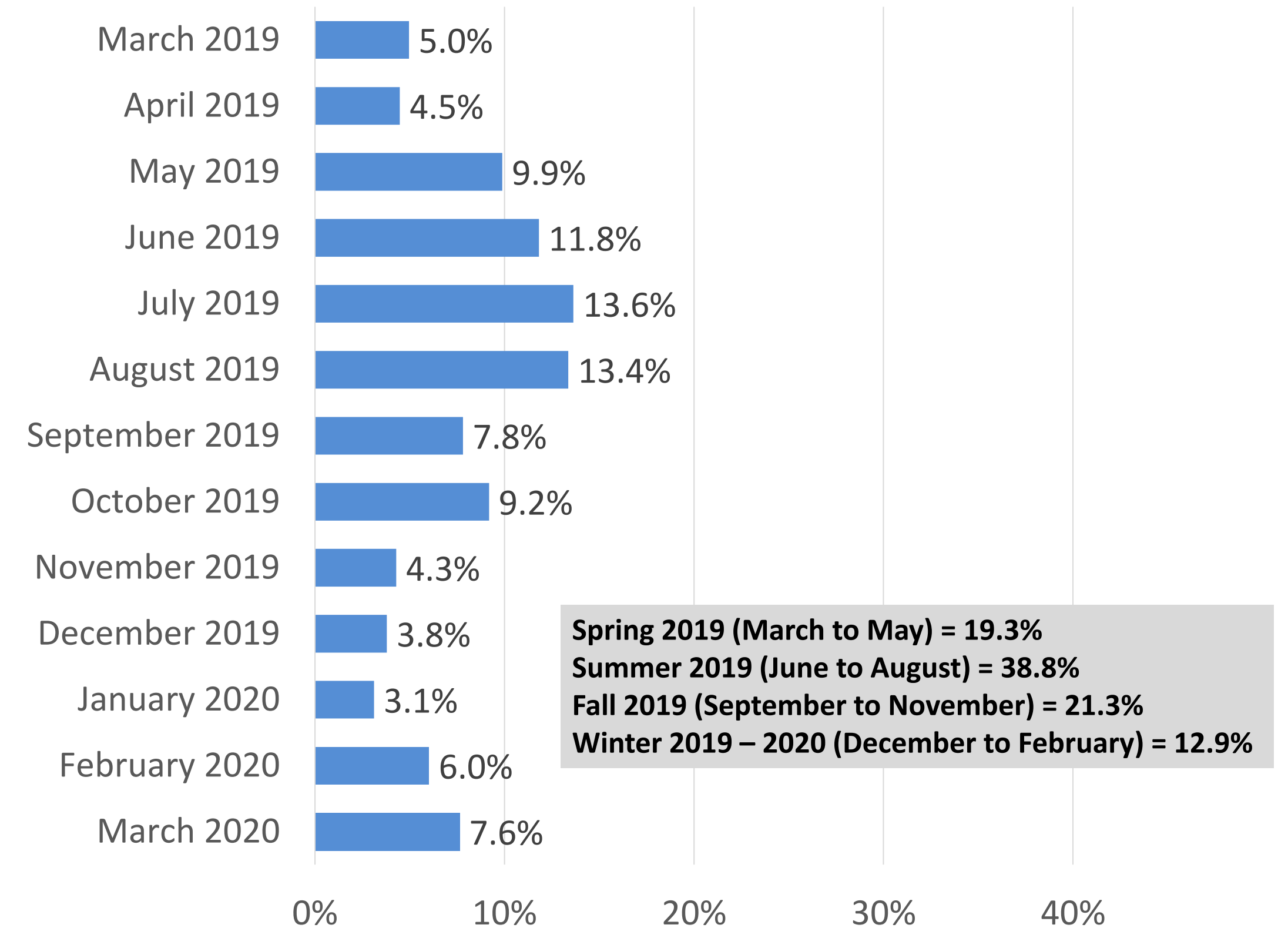
Question: In which month did you take this trip to Wilmington and Beaches? (Select one)
Base: All recent visitors. 1,227 completed surveys.

PRIMARY REASON FOR TRIP

Recent visitors primarily traveled to Wilmington and Beaches for leisure purposes. In total, 46.9 percent of recent visitors characterized their trip as a vacation, followed by 24.3 percent who took a weekend getaway.

Figure 4: Primary Reason for Trip
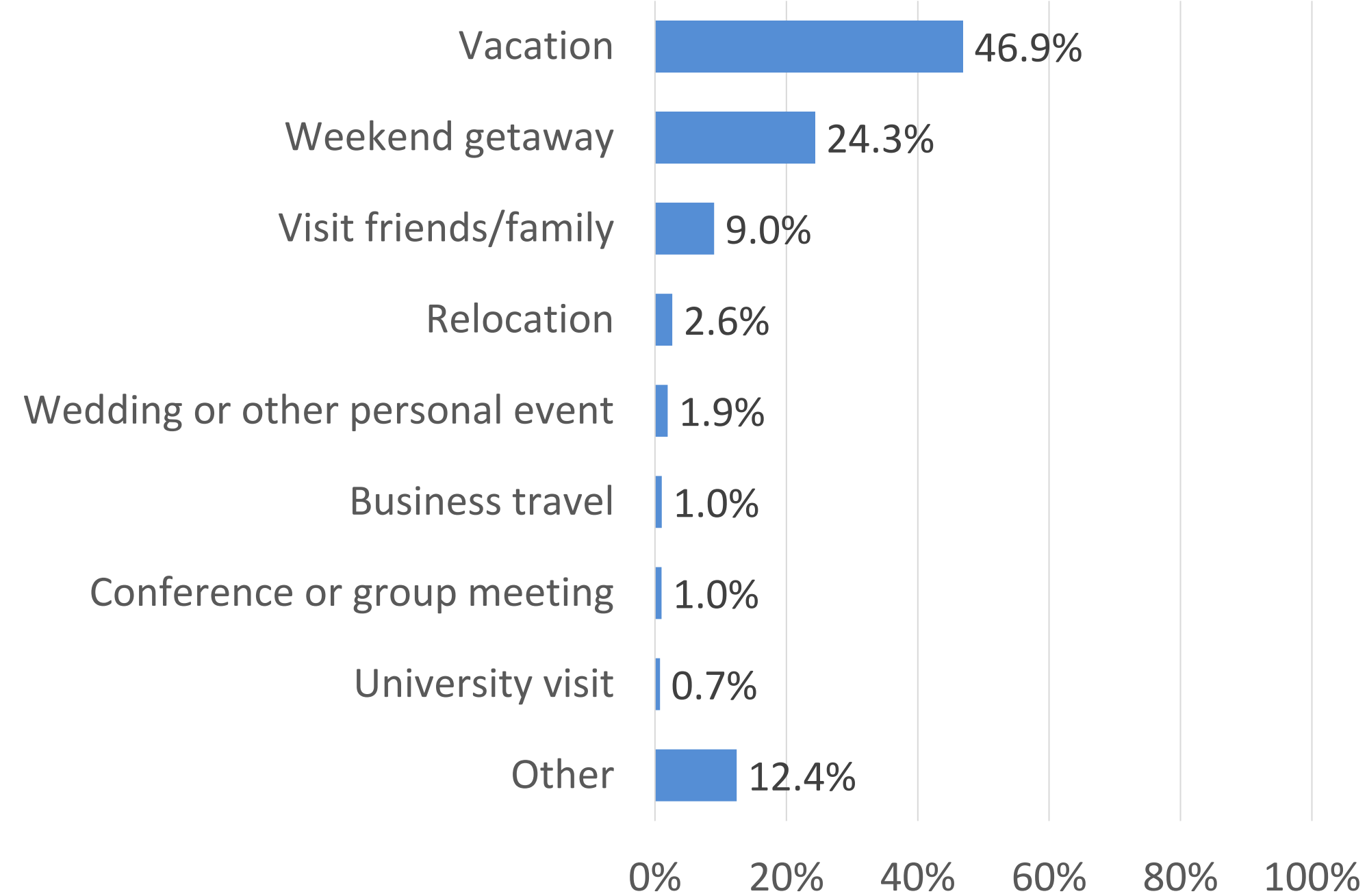
Detail by Visitor Type

	Total	In State	Out of State	City of Wilmington	Wrightsville Beach	Carolina Beach	Kure Beach
Vacation	46.9%	32.9%	64.7%	48.6%	44.5%	53.6%	59.9%
Weekend getaway	24.3%	34.2%	11.6%	21.8%	25.6%	23.6%	21.5%
Visit friends/family	9.0%	8.0%	10.5%	9.5%	10.2%	7.9%	7.5%
Relocation	2.6%	1.4%	4.4%	3.4%	3.9%	2.9%	2.5%
Wedding or other personal event	1.9%	2.4%	1.3%	1.9%	1.4%	1.5%	1.5%
Business travel	1.0%	1.4%	0.6%	1.2%	1.1%	0.7%	0.7%
Conference or group meeting	1.0%	1.3%	0.6%	1.1%	1.5%	0.4%	0.3%
University visit	0.7%	0.8%	0.6%	0.8%	1.2%	0.3%	0.3%
Other	12.4%	17.6%	5.8%	11.8%	10.6%	9.1%	5.8%
Base	1,227	704	509	898	538	742	549

Question: Which best describes the primary reason for this trip? (Select one)
Base: All recent visitors. 1,227 completed surveys.

DAYS SPENT IN WILMINGTON AND BEACHES

Recent visitors spent an average of 5.1 days in Wilmington and Beaches during their trip. In looking at recent visitors by residence, out-of-state visitors spent more time in the destination compared to in-state visitors (6.7 vs. 4.0).

Figure 5: Days Spent in Wilmington and Beaches
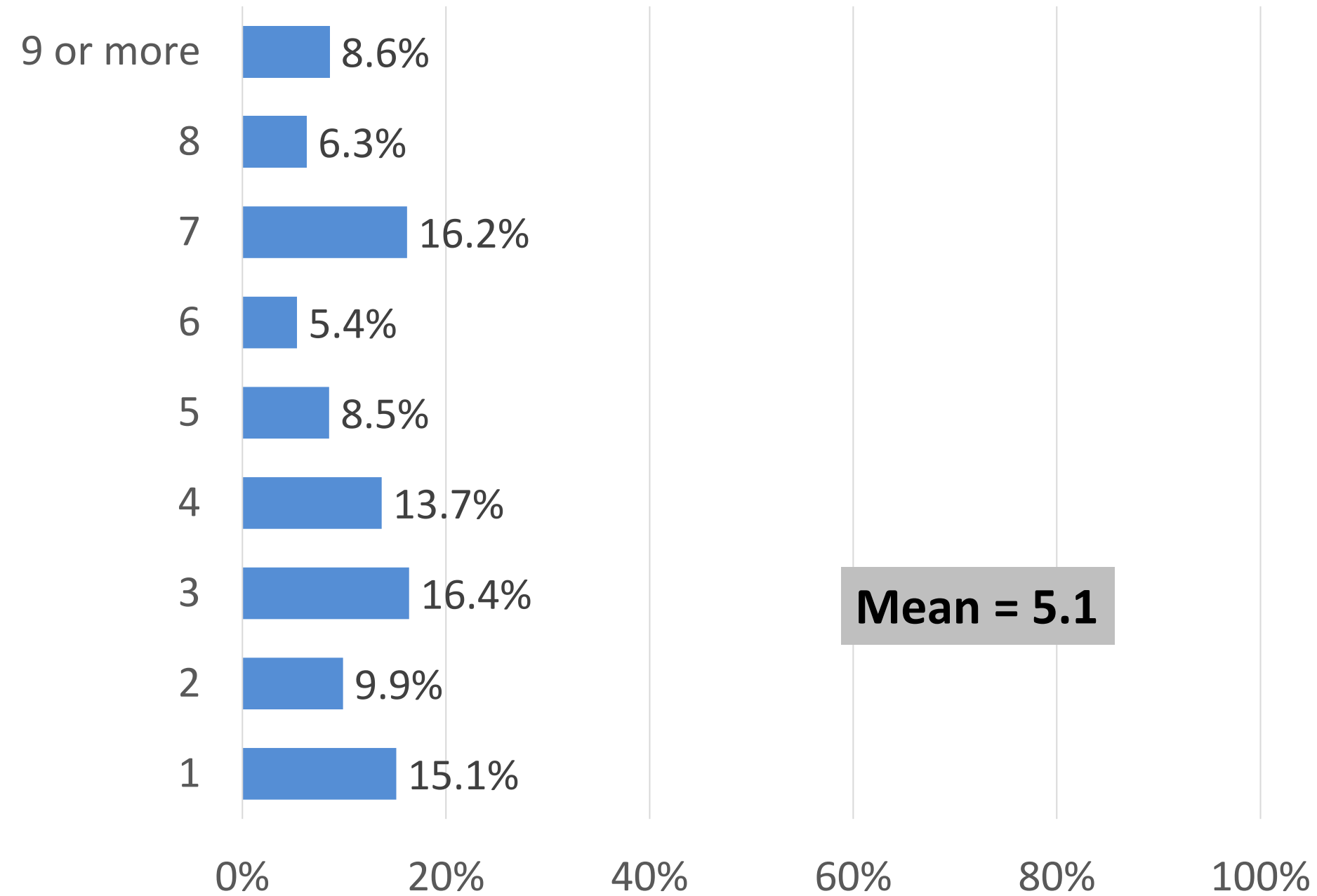
Mean = 5.1

Detail by Visitor Type

	Total	In State	Out of State	City of Wilmington	Wrightsville Beach	Carolina Beach	Kure Beach
9 or more	8.6%	4.7%	13.4%	9.6%	10.5%	10.3%	11.0%
8	6.3%	4.2%	9.0%	7.1%	4.3%	8.0%	10.7%
7	16.2%	9.5%	25.0%	17.6%	16.2%	18.7%	21.0%
6	5.4%	3.4%	8.0%	5.6%	5.3%	6.9%	6.5%
5	8.5%	6.0%	12.0%	9.0%	9.4%	9.4%	8.8%
4	13.7%	16.7%	9.7%	12.2%	15.4%	14.7%	13.8%
3	16.4%	20.2%	11.4%	14.6%	17.1%	16.7%	14.7%
2	9.9%	12.1%	6.8%	10.0%	9.3%	6.8%	6.0%
1	15.1%	23.3%	4.6%	14.3%	12.4%	8.5%	7.6%
Mean	5.1	**4.0**	**6.7**	5.4	5.4	5.7	5.9
Base	1,227	704	509	898	538	742	549

Question: How many days and nights did you spend in Wilmington and Beaches on this trip? Days.
Base: All recent visitors. 1,227 completed surveys.

NIGHTS SPENT IN WILMINGTON AND BEACHES

Recent visitors spent an average of 4.4 nights in Wilmington and Beaches.

Figure 6: Nights Spent in Wilmington and Beaches
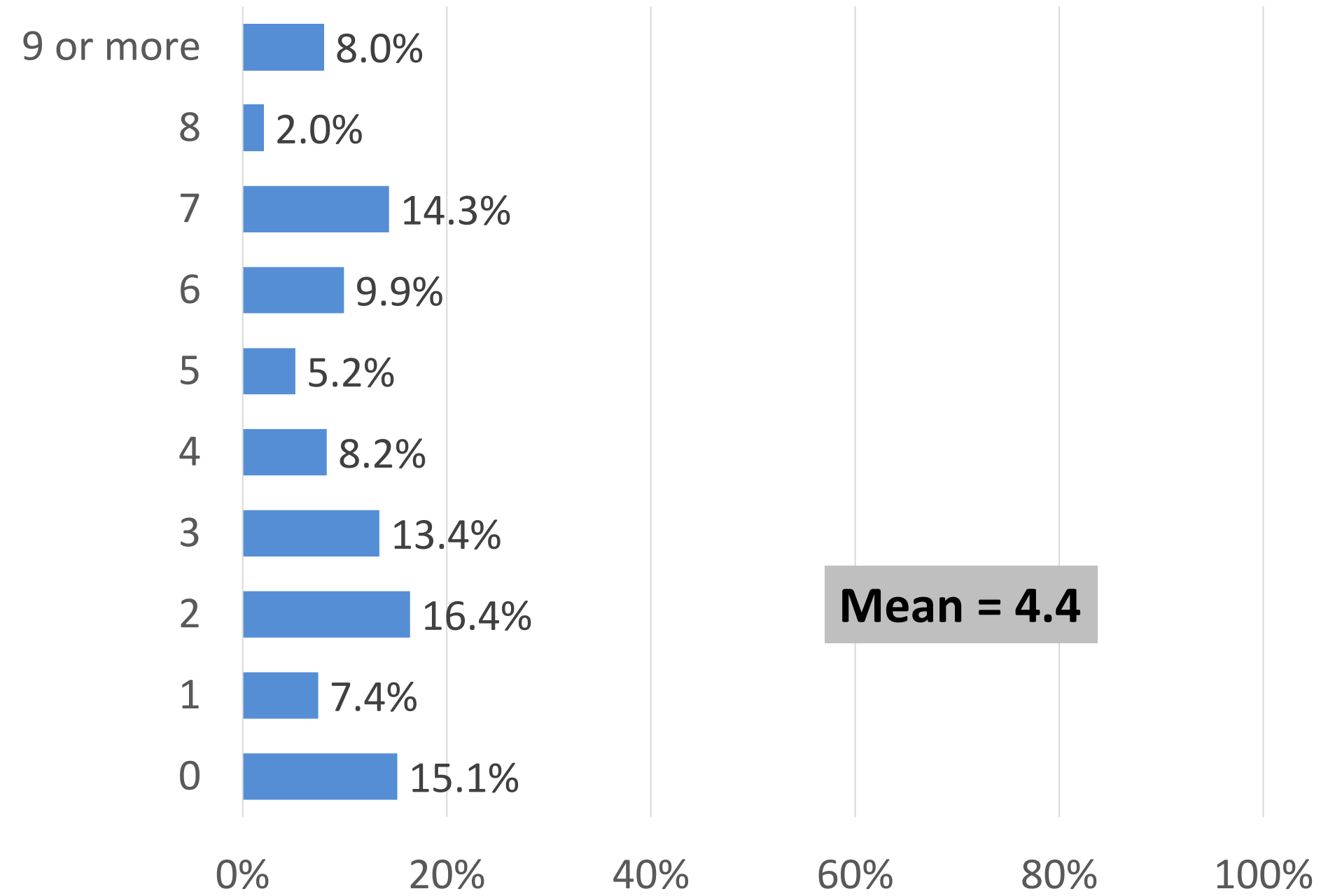
Mean = 4.4

Detail by Visitor Type

	Total	In State	Out of State	City of Wilmington	Wrightsville Beach	Carolina Beach	Kure Beach
9 or more	8.0%	3.8%	13.1%	9.1%	9.9%	9.3%	10.0%
8	2.0%	2.0%	2.2%	2.2%	2.2%	2.6%	3.5%
7	14.3%	8.5%	21.5%	14.9%	11.1%	17.4%	20.9%
6	9.9%	6.2%	15.2%	11.0%	10.7%	10.4%	11.4%
5	5.2%	3.4%	7.6%	4.6%	5.2%	7.0%	6.8%
4	8.2%	7.0%	9.7%	9.4%	10.1%	9.2%	7.9%
3	13.4%	16.7%	9.1%	12.1%	15.5%	13.8%	11.9%
2	16.4%	20.3%	11.4%	14.5%	14.9%	16.9%	14.2%
1	7.4%	10.3%	3.3%	7.2%	8.1%	4.7%	4.6%
0	15.1%	21.6%	6.9%	15.0%	12.3%	8.8%	8.8%
Mean	4.4	3.2	6.0	4.7	4.7	5.0	5.2
Base	1,227	704	509	898	538	742	549

Question: How many days and nights did you spend in Wilmington and Beaches on this trip? Nights.
Base: All recent visitors. 1,227 completed surveys.

AREA OF OVERNIGHT STAY

About 40 percent of recent visitors who stayed overnight in Wilmington and Beaches stayed in Carolina Beach (38.9%). Following Carolina Beach, the City of Wilmington was the most common area of overnight stay (27.0%), while similar percentages of recent visitors stayed overnight in Wrightsville Beach (18.0%) and Kure Beach (16.6%).

Figure 7: Area of Overnight Stay
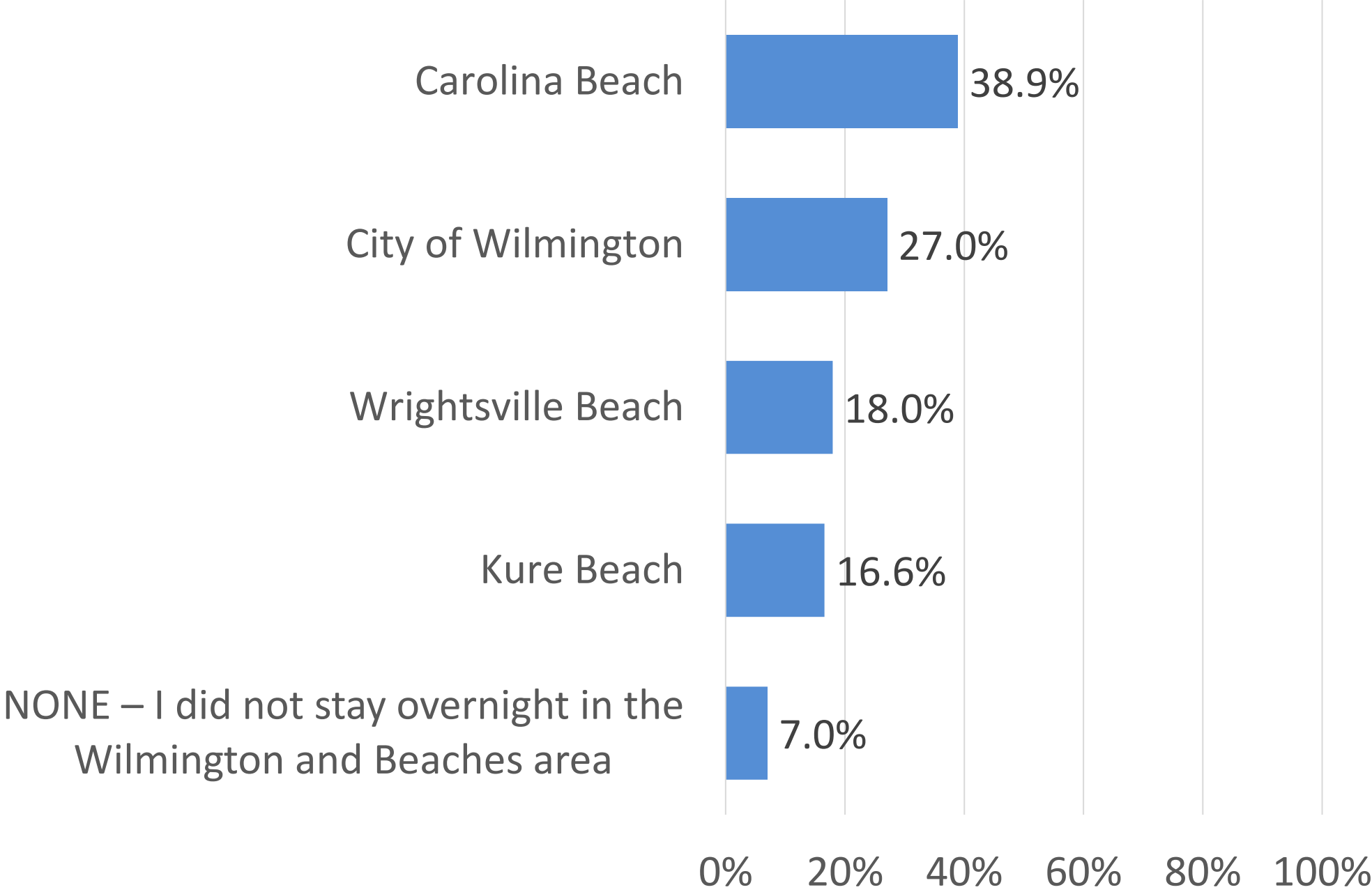
Detail by Visitor Type

	Total	In State	Out of State	City of Wilmington	Wrightsville Beach	Carolina Beach	Kure Beach
Carolina Beach	38.9%	37.7%	39.8%	32.7%	20.6%	55.2%	48.6%
City of Wilmington	27.0%	28.1%	25.7%	36.0%	39.9%	20.2%	18.0%
Wrightsville Beach	18.0%	19.4%	16.7%	16.4%	39.7%	8.4%	6.4%
Kure Beach	16.6%	17.5%	15.9%	14.5%	6.8%	21.3%	31.5%
NONE	7.0%	4.9%	9.6%	7.5%	4.5%	4.0%	5.6%
Base	1,060	569	477	778	482	682	504

Question: In which area did you stay overnight? (Select all that apply)
Base: All recent visitors who spent one or more nights. 1,060 completed surveys.

PLACE OF STAY

Recent overnight visitors commonly stayed in a hotel or motel or a vacation or home rental during their trip. Half of the recent overnight visitors stayed in a hotel or motel (48.0%), while 39.8 percent stayed overnight in a vacation home rental. In looking at the data by residence, in-state visitors were more likely to stay in a hotel or a motel (56.6%) while out-of-state visitors were more likely to stay in a vacation or home rental (47.8%).

Figure 8: Place of Stay
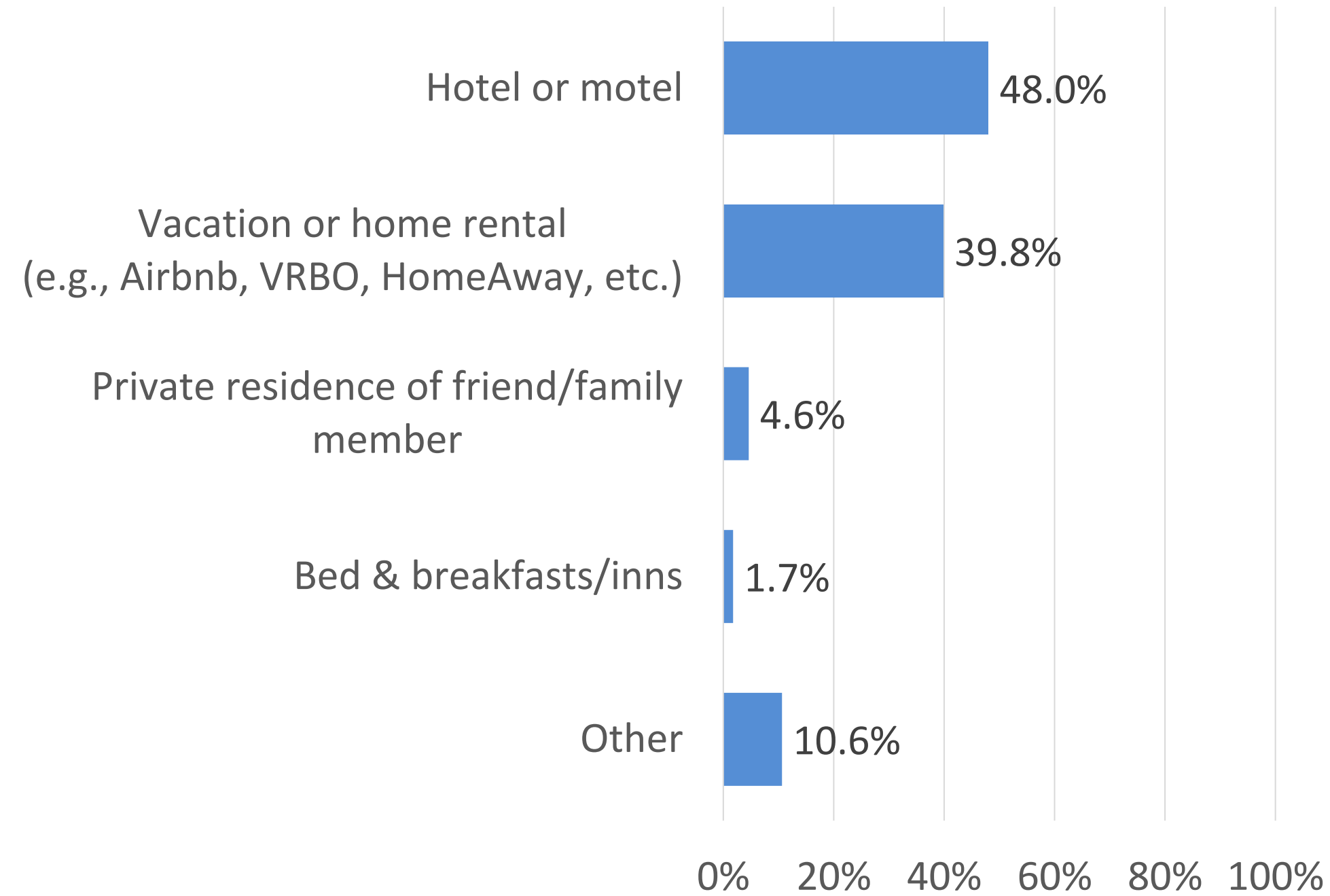
Question: Where did you stay during this trip? (Select all that apply)
Base: All recent visitors who stayed overnight in the Wilmington and Beaches area.
1,006 completed surveys.

Detail by Visitor Type

	Total	In State	Out of State	City of Wilmington	Wrightsville Beach	Carolina Beach	Kure Beach
Hotel or motel	48.0%	**56.6%**	37.5%	47.6%	56.4%	42.4%	40.3%
Vacation or home rental	39.8%	33.4%	**47.8%**	41.6%	34.8%	44.1%	48.4%
Private residence of friend/family member	4.6%	4.5%	4.7%	5.0%	4.8%	4.3%	5.2%
Bed & breakfasts/inns	1.7%	1.5%	2.0%	1.7%	2.7%	1.5%	2.0%
Other	10.6%	9.1%	12.3%	9.0%	6.8%	13.0%	10.3%
Base	1,006	550	442	735	467	662	483

TRAVEL PARTY COMPOSITION

The typical travel party to Wilmington and Beaches is comprised of 3.6 persons. This consists of 1.7 females, 1.3 males and 0.6 children on average. Kure Beach visitors tend to have the largest average travel party (3.9) while Wrightsville Beach visitors have the relatively smallest travel party (3.4).

Figure 9: Travel Party Composition

Mean = 3.6
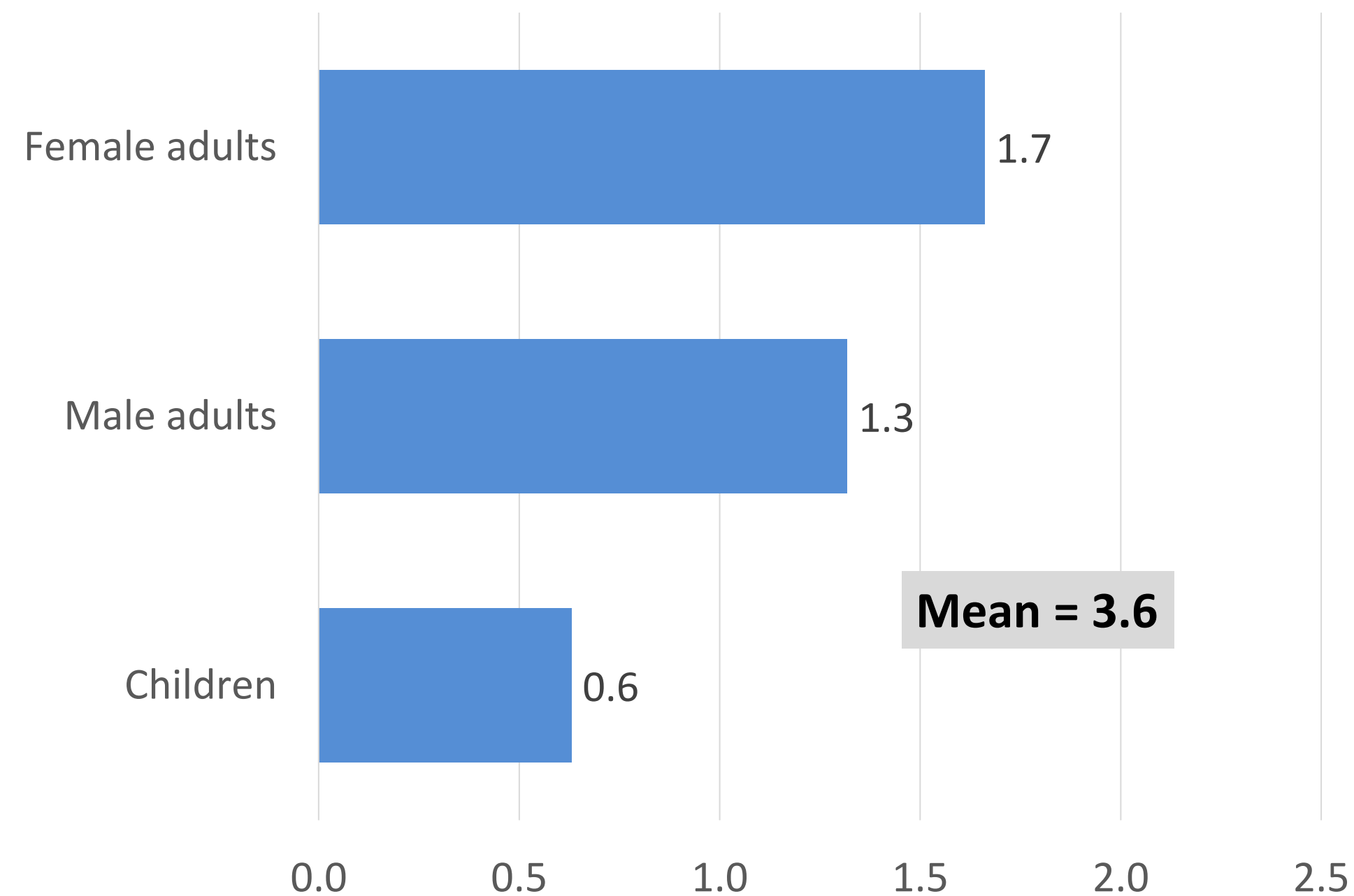
Question: Including yourself, how many male and female adults and children were in your travel party?
Base: All recent visitors. 1,227 completed surveys.

Detail by Visitor Type

	Total	In State	Out of State	City of Wilmington	Wrightsville Beach	Carolina Beach	Kure Beach
Female adults	1.7	1.6	1.8	1.7	1.6	1.7	1.7
Male adults	1.3	1.2	1.4	1.3	1.2	1.4	1.4
Children	0.6	0.6	0.6	0.6	0.6	0.7	0.8
Mean	3.6	3.5	3.8	3.6	**3.4**	3.7	**3.9**
Base	1,227	704	509	898	538	742	549

FAMILY OR GROUP REUNION

46.4 percent of recent visitors who traveled to Wilmington and Beaches with a large group of 10 or more persons reported that their trip was part of a family or group reunion.

Note: Given the small sample size, this data should be used for informational purposes only.

Figure 10: Family or Group Reunion
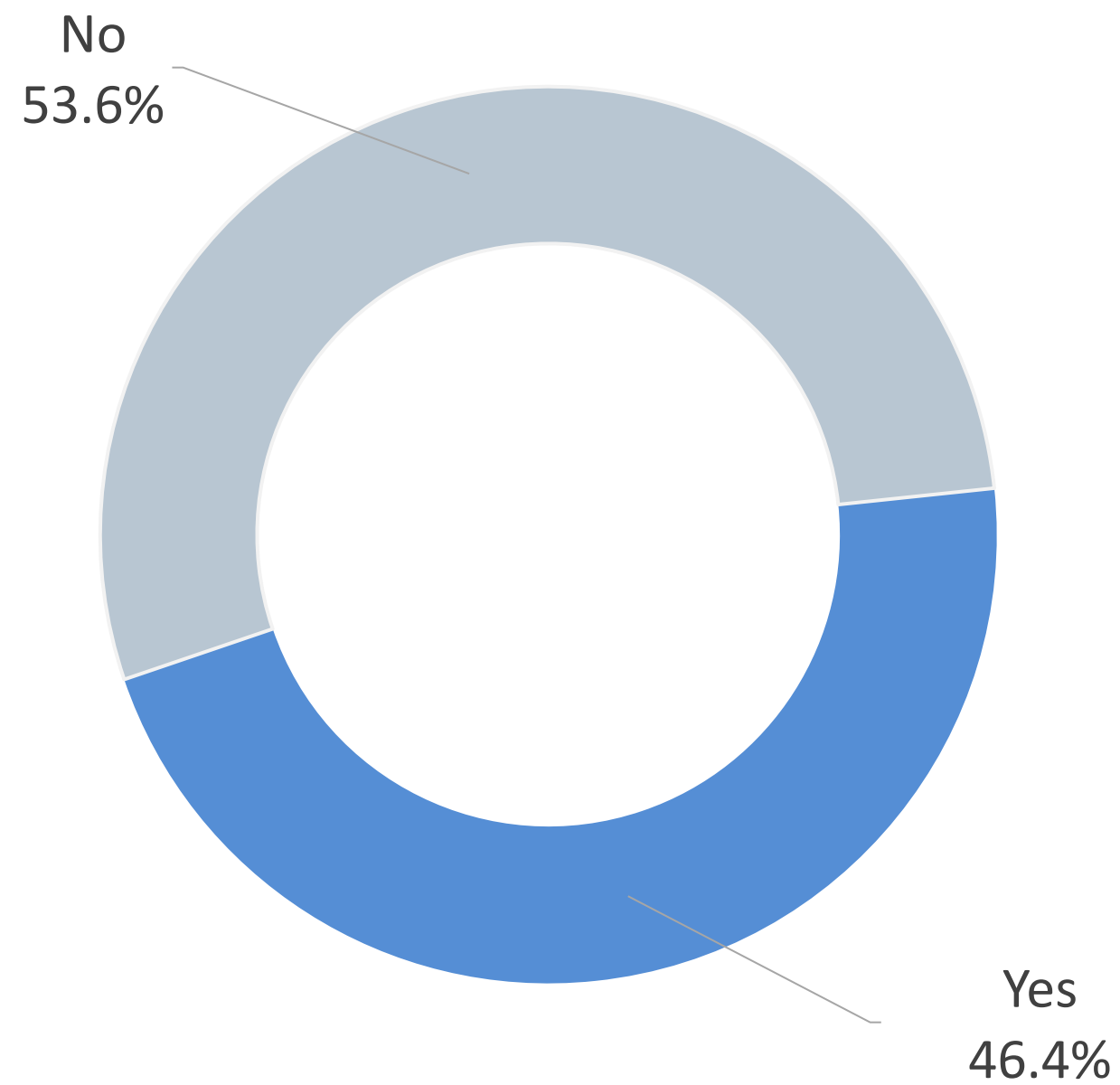
No
53.6%

Yes
46.4%

Detail by Visitor Type

	Total	In State	Out of State	City of Wilmington	Wrightsville Beach	Carolina Beach	Kure Beach
Yes	46.4%	24.6%	100.0%	41.7%	79.0%	55.5%	100.0%
No	53.6%	75.4%	0.0%	58.3%	21.0%	44.5%	0.0%
Base	10	8	2	7	4	5	4

Question: Was this trip part of a family or group reunion? (Select one)
Base: All recent visitors with large travel parties of 10 or more. 10 completed surveys.

REUNION ATTENDANCE SIZE

On average, 24.2 people attended a family or group reunion.

Note: Given the small sample size, this data should be used for informational purposes only.

Figure 11: Reunion Attendance Size

Detail by Visitor Type

	Total	In State	Out of State	City of Wilmington	Wrightsville Beach	Carolina Beach	Kure Beach
30 or more	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
20-30	68.8%	100.0%	50.0%	53.2%	100.0%	53.2%	54.7%
10-20	31.2%	0.0%	50.0%	46.8%	0.0%	46.8%	45.3%
Mean	24.2	25.2	23.5	21.3	27.3	21.3	21.5
Base	5	3	2	3	3	3	4
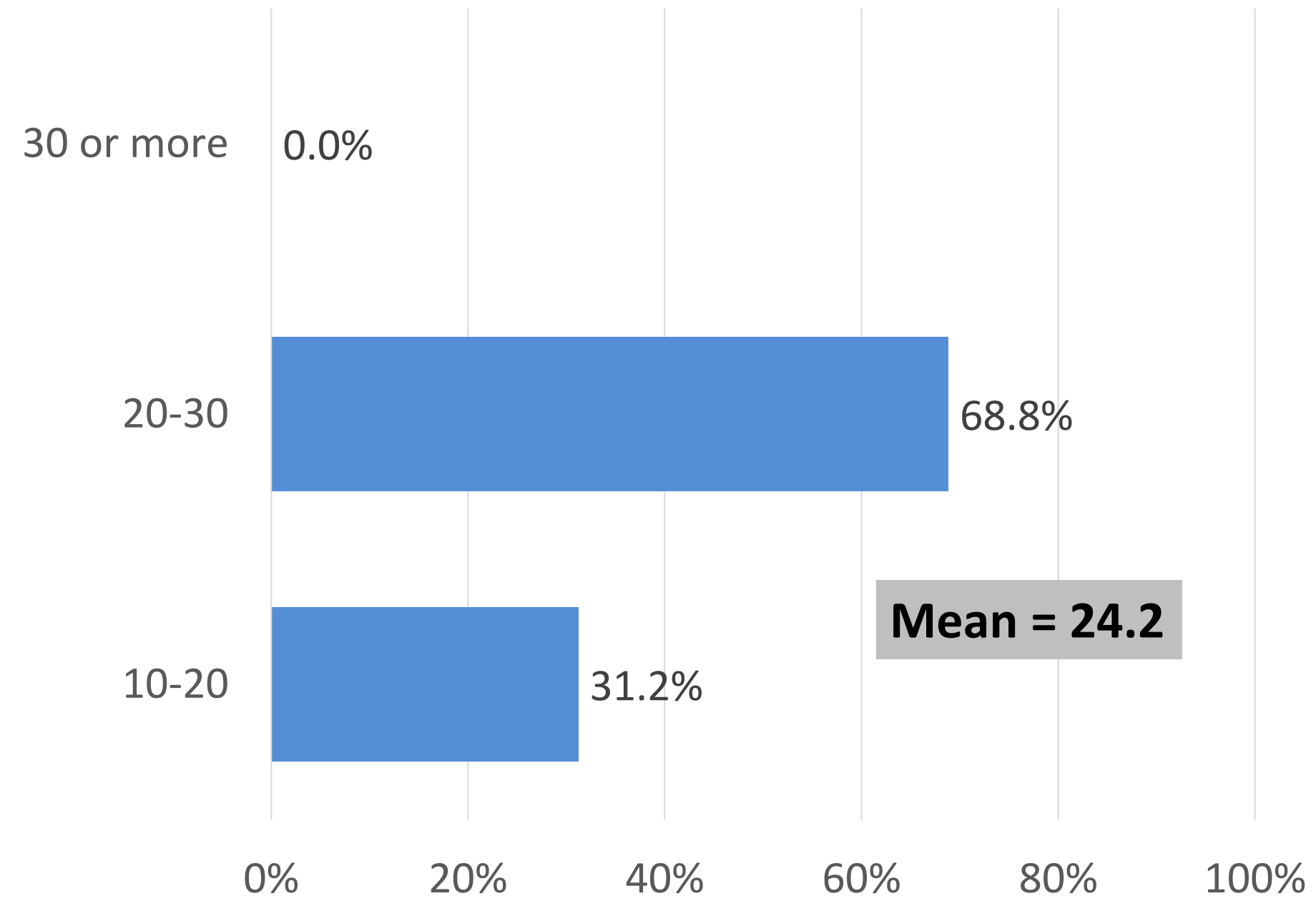
Question: How many total people attended this reunion?
Base: All recent visitors as part of a family or group reunion. 5 completed surveys.

METHOD OF ARRIVAL

The vast majority of recent visitors arrived in Wilmington and Beaches via personal car (90.9%).

Figure 12: Method of Arrival
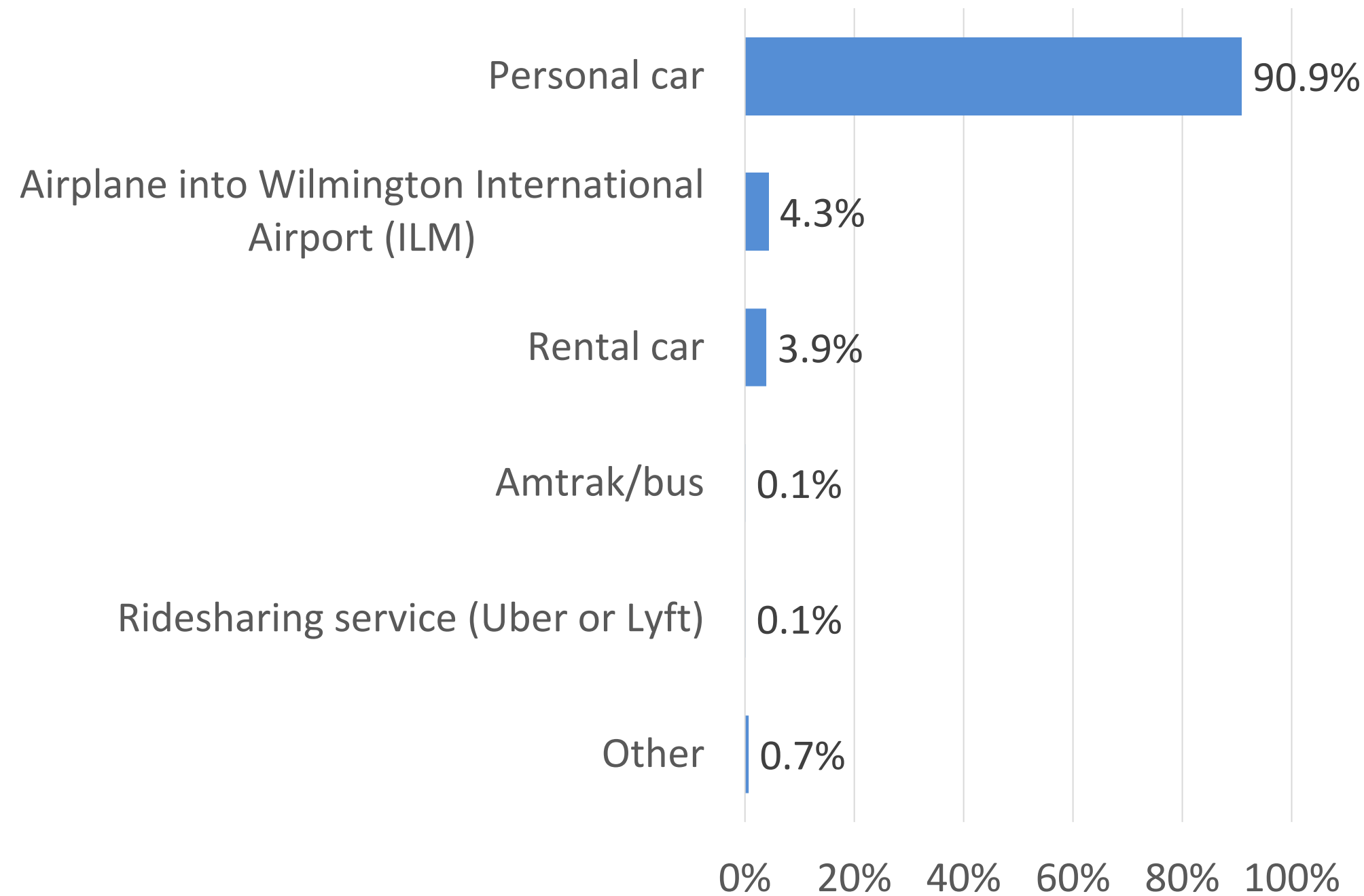
Detail by Visitor Type

	Total	In State	Out of State	City of Wilmington	Wrightsville Beach	Carolina Beach	Kure Beach
Personal car	90.9%	97.4%	82.7%	89.2%	88.9%	90.5%	91.3%
Airplane into Wilmington International Airport (ILM)	4.3%	0.0%	9.9%	5.1%	7.0%	4.3%	3.9%
Rental car	3.9%	1.8%	6.5%	4.4%	3.5%	4.6%	4.1%
Amtrak/bus	0.1%	0.2%	0.0%	0.1%	0.0%	0.0%	0.0%
Ridesharing service (Uber or Lyft)	0.1%	0.2%	0.0%	0.1%	0.0%	0.0%	0.0%
Other	0.7%	0.5%	0.9%	0.9%	0.6%	0.6%	0.7%
Base	1,227	704	509	898	538	742	549

Question: How did you arrive in Wilmington and Beaches? (Select one)
Base: All recent visitors. 1,227 completed surveys.

SPENDING PER DAY

The average travel party to Wilmington and Beaches spent $519.41 per day. The bulk of this spending is attributed to accommodations ($169.53), followed by restaurants/dining ($141.85). This reported daily spending per travel party covered an average of 2.9 visitors. Thus, it is estimated that the average Wilmington and Beaches visitor represents $182.09 in daily in-market spending.

Figure 13: Spending Per Day
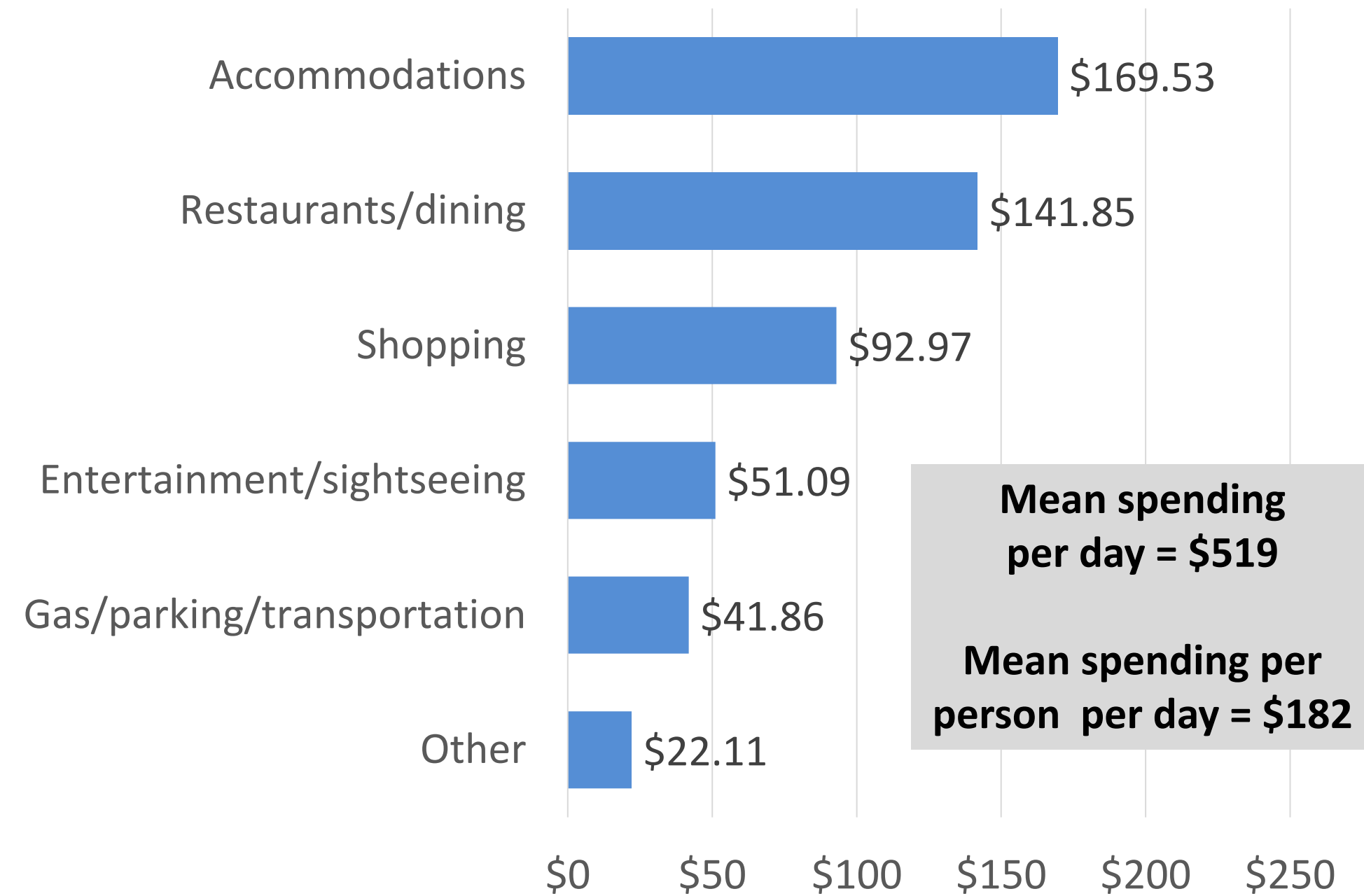
Mean spending per day = $519

Mean spending per person per day = $182

Question: PER DAY, approximately how much did you spend on each of the following while in Wilmington and Beaches? Please only include spending in Wilmington and Beaches and exclude any spending outside Wilmington and Beaches.
Base: All recent visitors. 1,114 completed surveys.

Detail by Visitor Type

	Total	In State	Out of State	City of Wilmington	Wrightsville Beach	Carolina Beach	Kure Beach
Accommodations	$169.53	$159.01	$180.69	$166.57	$187.87	$187.80	$198.59
Restaurants/dining	$141.85	$124.59	$165.42	$146.71	$153.82	$150.74	$150.97
Shopping	$92.97	$75.80	$116.19	$98.40	$102.49	$101.94	$101.48
Entertainment/ sightseeing	$51.09	$38.04	$68.93	$55.70	$64.72	$56.53	$60.44
Gas/parking/ transportation	$41.86	$38.36	$46.21	$41.87	$47.81	$42.84	$45.35
Other	$22.11	$23.46	$20.45	$22.74	$25.65	$24.14	$25.14
Total spending	**$519.41**	**$459.26**	**$597.89**	**$531.98**	**$582.36**	**$564.00**	**$581.97**
Number of people covered	**2.9**	**2.7**	**3.1**	**2.9**	**2.7**	**3.0**	**3.1**
Per person spending	**$182.09**	**$169.60**	**$195.94**	**$186.36**	**$212.39**	**$190.34**	**$186.25**
Base	1,114	655	445	818	487	666	490

DESTINATIONS VISITED AS PART OF TRIP

The City of Wilmington was the most commonly visited destination as part of a Wilmington and Beaches trip. About three-fourths of recent visitors reported that they went to the City of Wilmington as part of their trip (72.6%), followed by 60 percent who went to Carolina Beach (61.9%). Similar percentages of recent visitors, under half, went to Kure Beach (46.3%) and Wrightsville Beach (41.2%) during their trip to Wilmington and Beaches. Although the City of Wilmington was not the top area of overnight stay (27.0%, Figure 7), it incurred the highest visitation as part of a trip (72.6%).

Figure 14: Destinations Visited as Part of Trip
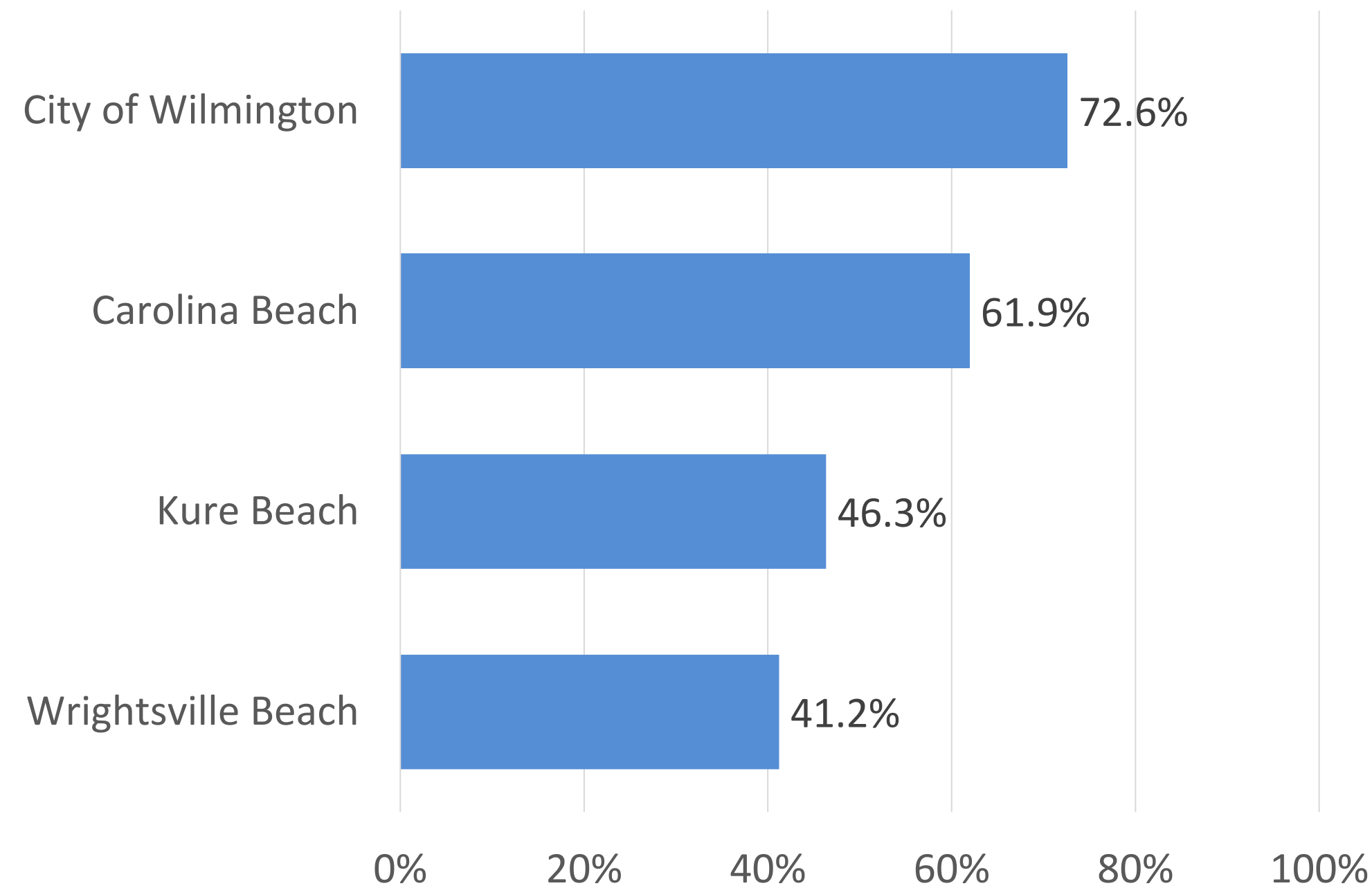
Detail by Visitor Type

	Total	In State	Out of State	City of Wilmington	Wrightsville Beach	Carolina Beach	Kure Beach
City of Wilmington	72.6%	64.9%	82.6%	--	79.4%	68.6%	70.0%
Carolina Beach	61.9%	56.3%	68.6%	58.5%	48.8%	--	85.7%
Kure Beach	46.3%	40.1%	54.4%	44.7%	34.6%	64.1%	--
Wrightsville Beach	41.2%	38.5%	44.6%	45.1%	--	32.5%	30.8%
Base	1,227	704	509	898	538	742	549

Question: Which of these destinations did you visit as part of your trip? (Select all that apply)
Base: All recent visitors. 1,227 completed surveys.

ACTIVITIES IN-MARKET

Visiting the beaches (82.2%), dining (82.0%) and shopping (67.7%) were the top activities that were part of a Wilmington and Beaches trip. This is followed by approximately 30 percent or more of recent visitors who visited a historic site (40.4%) and took a self-guided tour (29.2%). Out-of-state visitors were likelier to participate in all activities except for fishing and boating compared to in-state visitors. On average, out-of-state visitors participated in 5.3 activities during their trip, while in-state visitors participated in 3.9 activities.

Figure 15: Activities In-Market

Visit the beaches — 82.2%
Dining — 82.0%
Shopping — 67.7%
Visit a historic site/attraction — 40.4%
Self-guided tour — 29.2%
Breweries — 19.8%
Hiking, biking and/or running — 19.2%
Visit a museum/art gallery — 19.1%
Nightlife — 18.1%
Attend a special event/festival — 13.1%
Fishing — 12.6%
Cruises/water tours — 11.8%
Water recreational activities — 9.0%
Attend a concert/live music — 9.0%
Guided tour — 6.1%
Boating — 5.0%
Golf — 4.5%
Attend theater/performing arts — 3.2%
None of the above — 1.6%

Question: Which of these activities did you participate in during this trip? (Select all that apply)
Base: All recent visitors. 1,227 completed surveys.

Detail by Visitor Type

	Total	In State	Out of State	City of Wilmington	Wrightsville Beach	Carolina Beach	Kure Beach
Visit the beaches	82.2%	78.6%	86.7%	80.5%	90.5%	92.4%	93.4%
Dining	82.0%	78.4%	86.8%	85.9%	86.0%	84.6%	84.6%
Shopping	67.7%	59.2%	78.7%	74.4%	69.5%	72.9%	73.6%
Visit a historic site/attraction	40.4%	28.9%	55.1%	47.1%	42.6%	48.3%	54.3%
Self-guided tour	29.2%	25.9%	33.5%	32.7%	32.6%	32.0%	34.4%
Breweries	19.8%	14.8%	26.4%	24.3%	21.0%	22.2%	21.7%
Hiking, biking and/or running	19.2%	13.9%	26.5%	20.2%	22.1%	21.3%	22.9%
Visit a museum/art gallery	19.1%	14.6%	24.7%	22.2%	19.5%	23.9%	29.1%
Nightlife	18.1%	15.8%	21.7%	20.5%	22.9%	20.9%	18.5%
Attend a special event/festival	13.1%	10.7%	16.2%	14.5%	13.6%	14.7%	15.5%
Fishing	12.6%	14.3%	10.5%	10.5%	8.9%	15.4%	20.4%
Cruises/water tours	11.8%	10.6%	13.7%	14.3%	13.8%	13.5%	14.6%
Water recreational activities	9.0%	7.2%	11.0%	9.9%	11.9%	10.1%	10.3%
Attend a concert/live music	9.0%	7.3%	11.1%	10.4%	11.8%	10.8%	12.7%
Guided tour	6.1%	3.3%	9.5%	7.9%	8.0%	6.9%	6.3%
Boating	5.0%	5.3%	4.6%	5.2%	6.6%	5.4%	4.9%
Golf	4.5%	1.7%	8.4%	5.3%	4.0%	5.7%	5.5%
Attend theater/performing arts	3.2%	3.1%	3.5%	4.3%	5.4%	2.8%	2.1%
None of the above	1.6%	2.2%	0.9%	1.0%	0.7%	0.9%	0.7%
Base	1,227	704	509	898	538	742	549

ATTRACTIONS VISITED

About half of all recent visitors went to the Carolina Beach Boardwalk (51.2%) and Wilmington Riverwalk & Historic District (48.0%) during their trip to Wilmington and Beaches. One-third also went to the North Carolina Aquarium at Fort Fisher (34.7%), Fort Fisher State Recreation Area (34.4%) and Kure Beach Fishing Pier (34.2%). Out-of-state visitors went to 4.6 attractions on average during their trip, while in-state visitors went to 3.1 attractions.

Figure 16: Attractions Visited

Attraction	Percent
Carolina Beach Boardwalk	51.2%
Wilmington Riverwalk & Historic District	48.0%
North Carolina Aquarium at Fort Fisher	34.7%
Fort Fisher State Recreation Area	34.4%
Kure Beach Fishing Pier	34.2%
Fort Fisher Sate Historic Site & Civil War Museum	28.9%
Carolina Beach Fishing Pier	26.0%
Carolina Beach State Park	23.8%
Battleship NORTH CAROLINA	22.6%
Johnnie Mercers Pier	13.9%
Carolina Beach Fishing Center & Marina	10.8%
Historic Home Tours	9.0%
Airlie Gardens	8.1%
Wilmington Railroad Museum	6.7%
Wrightsville Beach History Museum	5.6%
Cape Fear Museum of History and Science	5.1%
Jungle Rapid Family Fun Park	3.4%
Arboretum at New Hanover County	3.3%
Children's Museum of Wilmington	2.6%
Cameron Art Museum	2.0%
None of the above	12.4%

Question: Which of these attractions did you visit during this trip to Wilmington and Beaches? (Select all that apply)
Base: All recent visitors. 1,227 completed surveys.

Detail by Visitor Type

	Total	In State	Out of State	City of Wilmington	Wrightsville Beach	Carolina Beach	Kure Beach
Carolina Beach Boardwalk	51.2%	46.0%	57.2%	49.3%	41.3%	75.6%	74.4%
Wilmington Riverwalk & Historic District	48.0%	39.5%	58.7%	62.0%	59.8%	47.6%	47.9%
North Carolina Aquarium at Fort Fisher	34.7%	29.4%	41.7%	35.9%	30.2%	43.9%	52.0%
Fort Fisher State Recreation Area	34.4%	30.9%	39.1%	36.0%	25.3%	46.6%	57.4%
Kure Beach Fishing Pier	34.2%	28.8%	41.6%	32.3%	21.5%	46.5%	66.5%
Fort Fisher Sate Historic Site & Civil War Museum	28.9%	23.4%	36.7%	31.9%	25.7%	38.7%	45.8%
Carolina Beach Fishing Pier	26.0%	20.3%	33.0%	26.3%	22.9%	39.4%	39.5%
Carolina Beach State Park	23.8%	19.8%	28.5%	24.5%	21.5%	35.3%	38.1%
Battleship NORTH CAROLINA	22.6%	16.8%	30.4%	27.2%	28.5%	24.8%	25.4%
Johnnie Mercers Pier	13.9%	14.0%	14.2%	15.5%	28.1%	12.3%	11.1%
Carolina Beach Fishing Center & Marina	10.8%	9.6%	12.2%	10.6%	8.2%	16.5%	17.2%
Historic Home Tours	9.0%	4.9%	13.8%	11.8%	12.4%	9.3%	9.3%
Airlie Gardens	8.1%	5.7%	11.2%	10.6%	14.5%	7.9%	7.8%
Wilmington Railroad Museum	6.7%	4.6%	9.3%	8.6%	8.2%	6.9%	8.0%
Wrightsville Beach History Museum	5.6%	4.6%	7.0%	6.0%	11.9%	4.4%	4.6%
Cape Fear Museum of History and Science	5.1%	3.0%	7.5%	6.2%	6.2%	6.2%	6.8%
Jungle Rapid Family Fun Park	3.4%	2.7%	4.3%	4.0%	4.1%	4.2%	5.2%
Arboretum at New Hanover County	3.3%	2.4%	4.4%	4.4%	5.1%	3.0%	3.4%
Children's Museum of Wilmington	2.6%	1.4%	4.2%	2.9%	3.4%	3.1%	3.6%
Cameron Art Museum	2.0%	1.1%	3.2%	2.7%	3.3%	2.2%	2.9%
None of the above	12.4%	15.8%	8.0%	10.2%	12.9%	4.2%	1.8%
Base	1,227	704	509	898	538	742	549

RESOURCES USED FOR TRIP PLANNING

General internet search (40.4%) and word-of-mouth (27.9%) were the most common resources used to plan a Wilmington and Beaches trip. In total, 43.2 percent of recent visitors used at least one official Wilmington and Beaches resource, including WilmingtonandBeaches.com (23.8%), the official printed visitors guide (20.7%), the official online visitors guide (14.6%), official social media sites (10.6%) and/or the e-special newsletter (5.7%).

Figure 17: Resources Used for Trip Planning

General internet search — 40.4%
Friends/family members — 27.9%
The official tourism website, WilmingtonandBeaches.com — 23.8%
The official Wilmington and Beaches visitors guide (print version) — 20.7%
Website of a specific hotel, attraction and/or event — 16.2%
The official Wilmington and Beaches visitors guide (online version) — 14.6%
The official North Carolina tourism website, VisitNC.com — 12.9%
User review websites — 12.1%
Wilmington and Beaches official social media sites — 10.6%
Travel booking website — 7.2%
The official North Carolina travel guide — 6.8%
Advertising — 6.8%
The official Wilmington and Beaches e-special newsletter — 5.7%
Other — 10.0%
None of the above — 19.2%

Question: Which of the following did you use to plan your trip? (Select all that apply)
Base: All recent visitors. 1,227 completed surveys.

Detail by Visitor Type

	Total	In State	Out of State	City of Wilmington	Wrightsville Beach	Carolina Beach	Kure Beach
General internet search	40.4%	36.5%	45.1%	44.6%	45.6%	43.8%	44.1%
Friends/family members	27.9%	24.7%	32.6%	29.5%	31.4%	29.1%	30.3%
The official tourism website, WilmingtonandBeaches.com	23.8%	15.5%	34.3%	27.4%	30.9%	25.6%	26.1%
The official Wilmington and Beaches visitors guide (print version)	20.7%	11.9%	31.7%	23.8%	25.5%	23.5%	26.4%
Website of a specific hotel, attraction and/or event	16.2%	17.1%	14.6%	16.5%	19.5%	17.0%	16.5%
The official Wilmington and Beaches visitors guide (online version)	14.6%	9.6%	20.5%	16.9%	15.1%	16.0%	17.0%
The official North Carolina tourism website, VisitNC.com	12.9%	11.0%	15.0%	14.3%	15.8%	15.0%	14.1%
User review websites	12.1%	12.0%	12.0%	13.2%	14.1%	13.0%	12.5%
Wilmington and Beaches official social media sites	10.6%	8.6%	13.2%	11.0%	12.7%	13.2%	13.8%
Travel booking website	7.2%	6.6%	7.4%	8.4%	8.5%	8.0%	7.9%
The official North Carolina travel guide	6.8%	4.7%	9.3%	7.9%	9.1%	7.6%	8.4%
Advertising	6.8%	5.1%	9.0%	7.6%	6.8%	7.9%	7.8%
The official Wilmington and Beaches e-special newsletter	5.7%	3.5%	8.4%	7.2%	6.3%	5.8%	7.1%
Other	10.0%	8.6%	11.9%	10.1%	9.9%	12.2%	12.6%
None of the above	19.2%	23.5%	13.8%	16.5%	15.4%	17.2%	16.1%
Base	1,227	704	509	898	538	742	549

IMPORTANT FACTORS IN DECIDING TO VISIT

Relaxation (60.7%), affordability (57.4%) and previous trips to Wilmington and Beaches (56.0%) were the most important factors in deciding to visit the destination. A secondary set of factors important to the decision to visit include ease of access (44.1%) and overall ambiance and atmosphere (41.6%).

Figure 18: Important Factors in Deciding to Visit

Relaxation — 60.7%
Affordability/cost — 57.4%
Visited Wilmington and Beaches before and wanted to return — 56.0%
Easy to get to — 44.1%
Overall ambiance and atmosphere — 41.6%
Visit friends/family — 21.3%
Outdoor recreational activities — 18.3%
Always wanted to visit Wilmington and Beaches — 14.3%
Attend a special event/festival — 8.6%
Word-of-mouth recommendation — 8.3%
None of the above — 4.0%
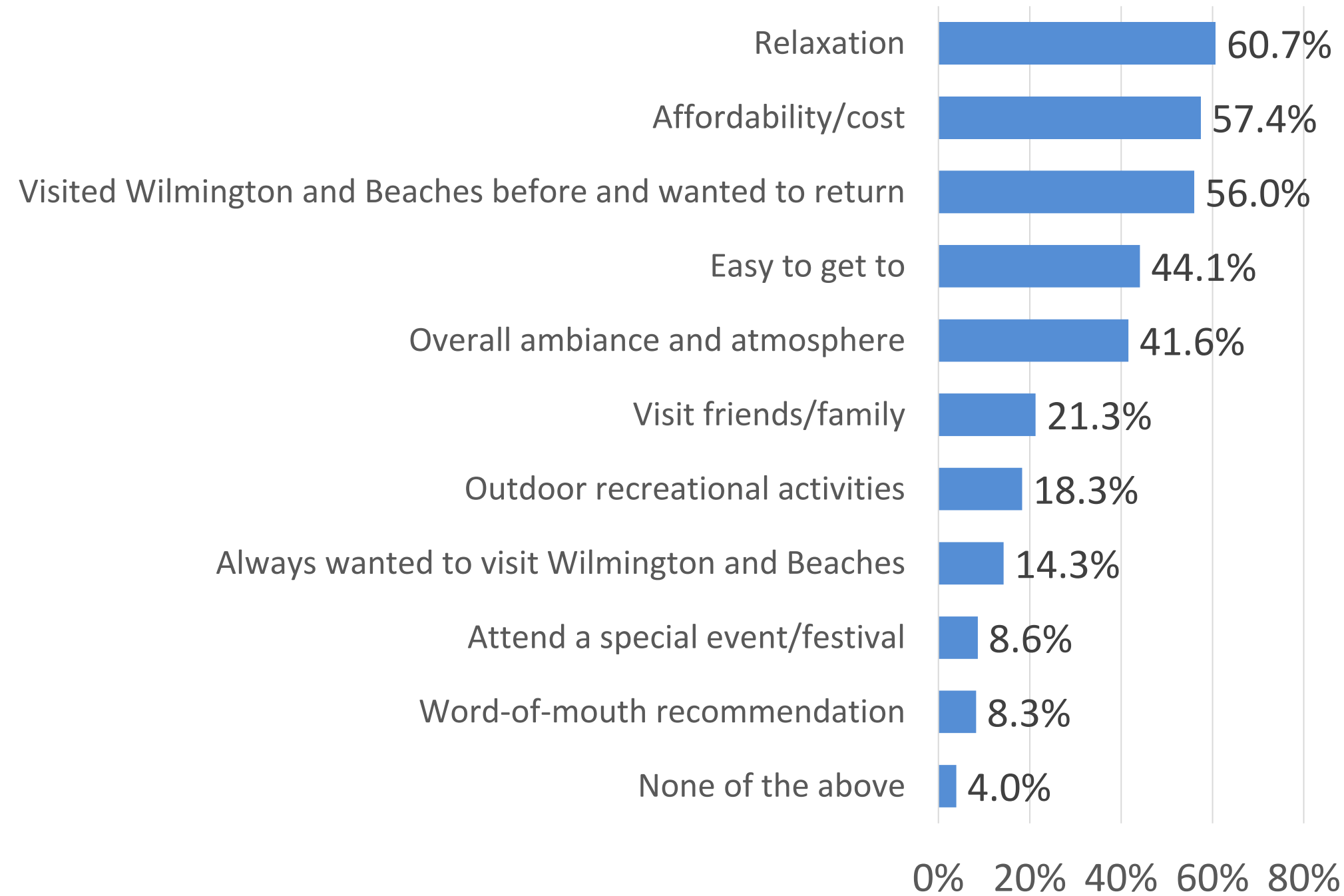
Question: Which of the following were IMPORTANT to your decision to visit Wilmington and Beaches? (Select all that apply)
Base: All recent visitors. 1,227 completed surveys.

Detail by Visitor Type

	Total	In State	Out of State	City of Wilmington	Wrightsville Beach	Carolina Beach	Kure Beach
Relaxation	60.7%	56.9%	65.9%	59.5%	61.2%	67.8%	72.3%
Affordability/cost	57.4%	54.8%	61.1%	57.6%	53.9%	65.5%	68.3%
Visited Wilmington and Beaches before and wanted to return	56.0%	55.3%	56.8%	57.9%	60.2%	60.1%	60.7%
Easy to get to	44.1%	52.6%	33.0%	41.4%	43.0%	46.1%	45.0%
Overall ambiance and atmosphere	41.6%	37.2%	47.0%	43.5%	41.9%	48.5%	52.2%
Visit friends/family	21.3%	17.9%	26.3%	23.0%	24.7%	20.7%	17.6%
Outdoor recreational activities	18.3%	17.8%	18.7%	19.5%	20.8%	22.1%	22.5%
Always wanted to visit Wilmington and Beaches	14.3%	10.1%	19.9%	15.9%	20.3%	14.7%	13.4%
Attend a special event/festival	8.6%	9.9%	7.2%	10.2%	8.0%	7.6%	6.2%
Word-of-mouth recommendation	8.3%	6.2%	11.2%	9.4%	8.2%	9.8%	9.7%
None of the above	4.0%	4.4%	3.2%	4.1%	4.0%	3.6%	2.5%
Base	1,227	704	509	898	538	742	549

ENHANCEMENTS TO VISITOR EXPERIENCE

Parking was the top recommendation for enhancing the visitor experience in Wilmington and Beaches, including better parking (16.1%), free parking (8.9%) and more parking (8.0%). In an open-ended format, recent visitors were asked to write in the attractions, activities or services that would most enhance their experience in Wilmington and Beaches. In addition to suggestions around parking, one-in-ten recent visitors suggested more restaurant/food options (10.7%).

Figure 19: Enhancements to Visitor Experience

Enhancement	%
Better parking	16.1%
More restaurant/food choices	10.7%
Free/affordable parking	8.9%
More parking	8.0%
More amenities/things to do	6.4%
More festivals/events	6.0%
Better traffic management	4.5%
More shops	4.4%
Stop tourism overdevelopment	3.8%
Better beach access	3.8%
Better price on lodging	3.6%
Ease of getting around	3.5%
Better/more public restrooms	3.4%

Detail by Visitor Type

	Total	In State	Out of State	City of Wilmington	Wrightsville Beach	Carolina Beach	Kure Beach
Better parking	16.1%	15.9%	16.7%	18.2%	20.3%	16.7%	15.9%
More restaurant/food choices	10.7%	10.1%	12.0%	11.3%	7.8%	11.8%	12.7%
Free/affordable parking	8.9%	11.9%	4.1%	8.7%	7.6%	8.9%	7.4%
More parking	8.0%	9.9%	4.9%	8.8%	7.1%	4.9%	6.1%
More amenities/things to do	6.4%	3.9%	9.6%	7.2%	7.9%	7.0%	5.5%
More festivals/events	6.0%	5.5%	6.8%	4.9%	5.5%	7.3%	5.3%
Better traffic management	4.5%	5.7%	2.7%	3.8%	4.4%	5.2%	6.5%
More shops	4.4%	4.1%	5.0%	5.9%	2.8%	3.6%	2.9%
Stop tourism overdevelopment	3.8%	3.8%	3.5%	3.8%	3.2%	4.0%	3.3%
Better beach access	3.8%	4.5%	2.8%	3.7%	2.7%	3.0%	3.5%
Better price on lodging	3.6%	5.1%	1.4%	3.2%	4.7%	2.8%	2.9%
Ease of getting around	3.5%	3.2%	4.1%	3.9%	0.9%	2.7%	4.2%
Better/more public restrooms	3.4%	5.2%	0.5%	3.1%	3.7%	3.9%	2.4%
Base	483	298	181	337	205	299	215

Question: What attractions, things to do or services would most enhance the visitor experience in Wilmington and Beaches?
Base: All recent visitors who suggested an enhancement. 483 completed surveys.
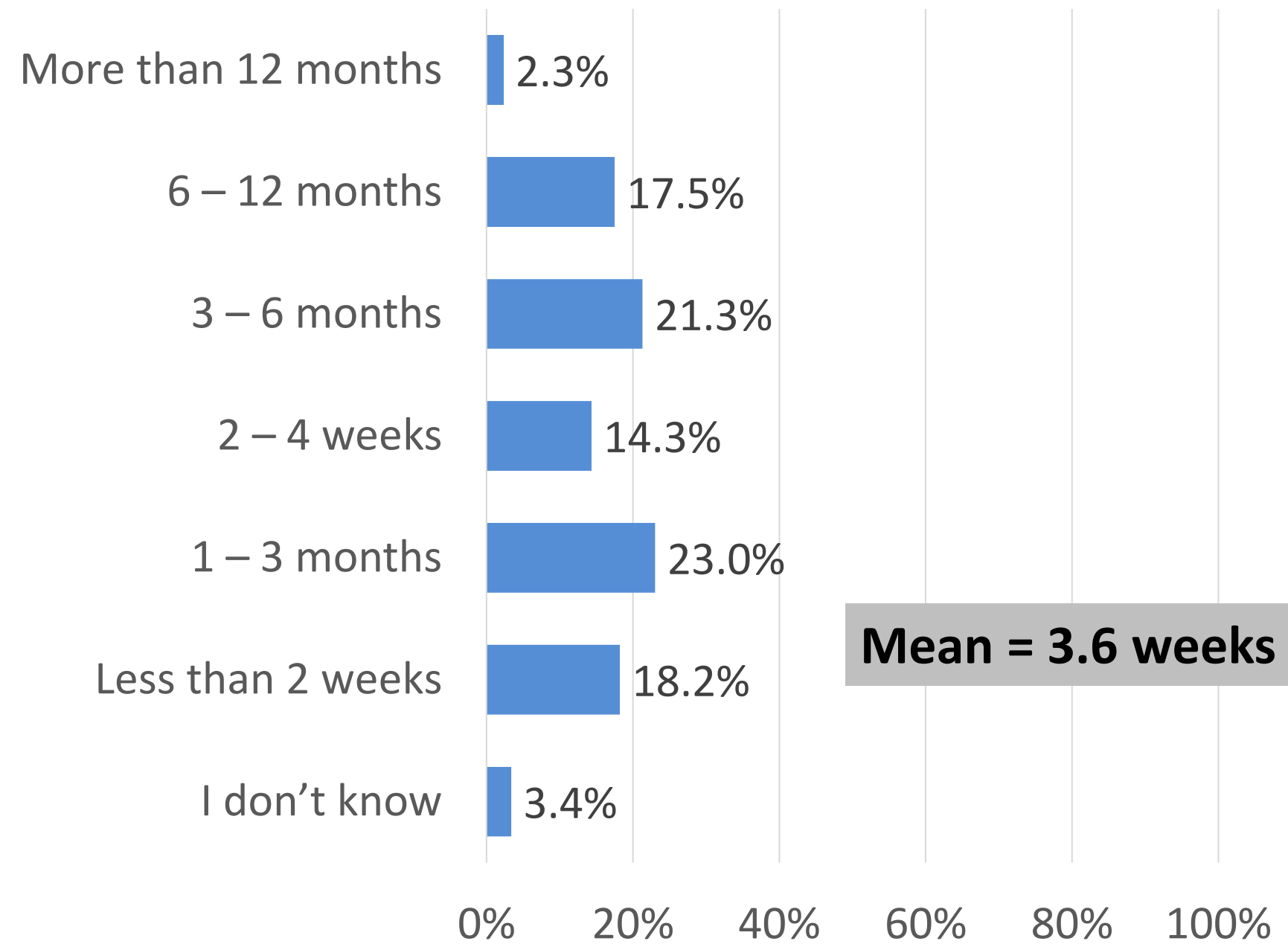
TRIP PLANNING TIMELINE

The typical recent visitor to Wilmington and Beaches began planning their trip 3.6 weeks in advance. Out-of-state visitors have a longer planning window at 4.7 weeks compared to in-state visitors at 2.7 weeks.

Figure 20: Trip Planning Timeline

Mean = 3.6 weeks

Detail by Visitor Type

	Total	In State	Out of State	City of Wilmington	Wrightsville Beach	Carolina Beach	Kure Beach
More than 12 months	2.3%	1.4%	3.5%	2.7%	1.8%	2.8%	3.5%
6 – 12 months	17.5%	10.8%	26.1%	18.9%	15.8%	19.1%	23.6%
3 – 6 months	21.3%	14.3%	30.1%	22.0%	19.8%	24.5%	25.0%
1 – 3 months	14.3%	19.1%	7.8%	13.3%	16.0%	13.0%	11.6%
2 – 4 weeks	23.0%	23.4%	23.2%	23.1%	29.0%	23.1%	20.7%
Less than 2 weeks	18.2%	26.0%	8.1%	17.2%	14.7%	14.5%	12.7%
I don't know	3.4%	5.0%	1.3%	2.8%	2.9%	3.1%	2.8%
Mean (weeks)	3.6	**2.7**	**4.7**	3.8	3.4	3.9	4.4
Base	1,227	704	509	898	538	742	549

Question: How far in advance did you begin planning this trip to Wilmington and Beaches? (Select one) Base: All recent visitors. 1,227 completed surveys.

Recent visitors are highly likely to be repeat visitors, with more than nine-in-ten being repeat visitors (91.5%). On average, recent visitors have taken 14.1 trips to Wilmington and Beaches. In state visitors have taken the more trips to Wilmington and Beaches compared to out of state visitors (16.9 vs 10.6).

Figure 21: Total Visits to Wilmington and Beaches
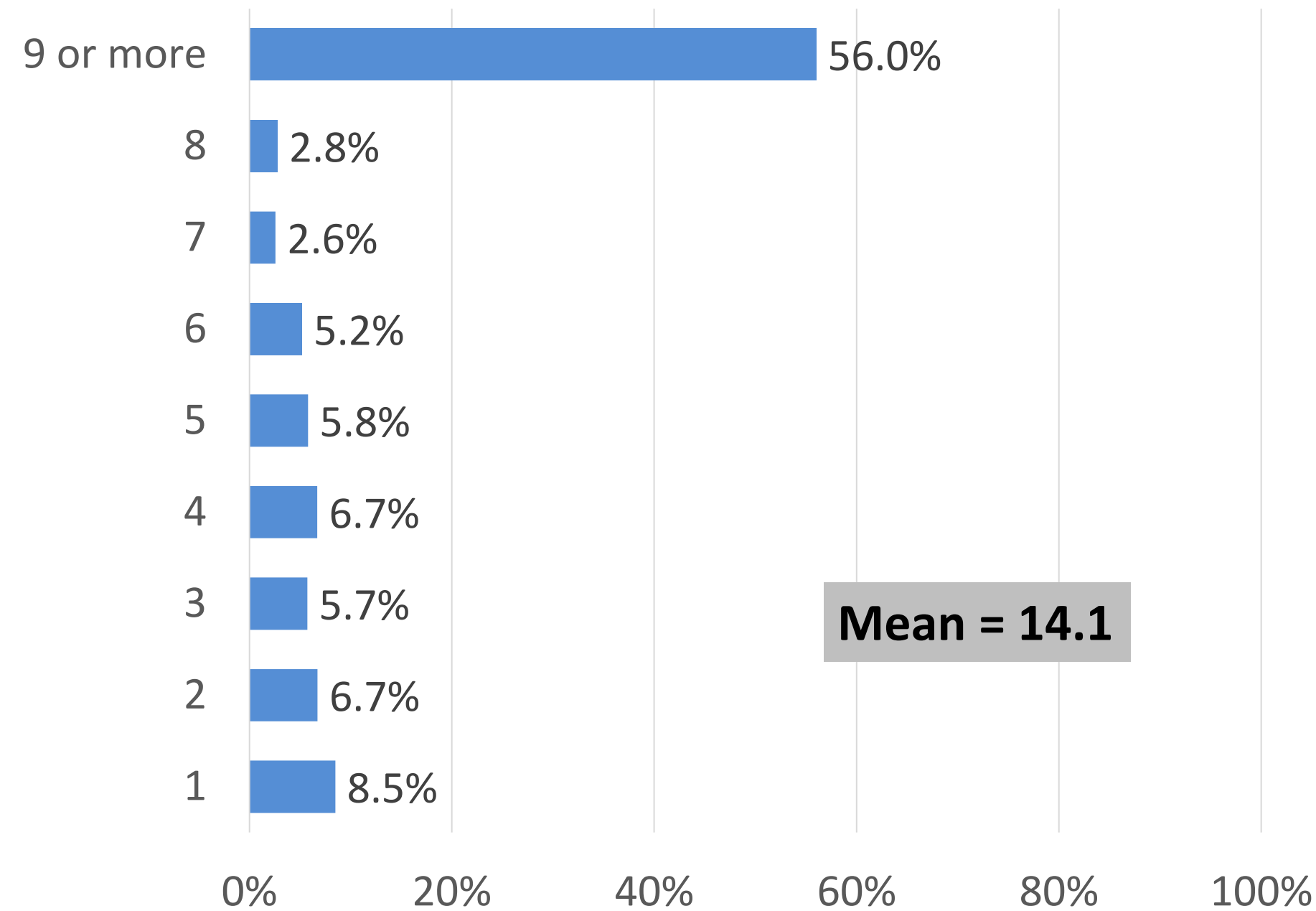
Mean = 14.1

9 or more	56.0%
8	2.8%
7	2.6%
6	5.2%
5	5.8%
4	6.7%
3	5.7%
2	6.7%
1	8.5%

Detail by Visitor Type

	Total	In State	Out of State	City of Wilmington	Wrightsville Beach	Carolina Beach	Kure Beach
9 or more	56.0%	68.4%	40.3%	53.7%	48.3%	55.8%	57.2%
8	2.8%	2.4%	3.3%	2.3%	3.1%	2.4%	2.1%
7	2.6%	1.5%	3.9%	2.4%	3.8%	2.1%	2.9%
6	5.2%	6.3%	3.9%	5.3%	5.2%	4.9%	4.1%
5	5.8%	4.3%	7.8%	6.3%	5.3%	7.3%	7.3%
4	6.7%	5.0%	8.9%	7.1%	8.9%	6.6%	6.4%
3	5.7%	4.6%	7.3%	6.4%	8.2%	5.5%	5.0%
2	6.7%	3.9%	10.7%	7.2%	8.7%	7.5%	7.0%
1	8.5%	3.8%	14.0%	9.3%	8.5%	7.9%	8.1%
Mean	14.1	**16.9**	**10.6**	13.6	12.3	14.2	14.2
Base	1,227	704	509	898	538	742	549

Question: Including this trip, how many total times have you visited Wilmington and Beaches? Please select "1" if this trip was your first visit to Wilmington and Beaches.
Base: All recent visitors. 1,227 completed surveys.

LIKELIHOOD TO RETURN

Given that the vast majority of recent visitors are repeat visitors, they also have a high likelihood to return to the destination. Nearly all recent visitors reported being "likely" (9.9%) or "very likely" (84.9%) to return to Wilmington and Beaches.

Figure 22: Likelihood to Return
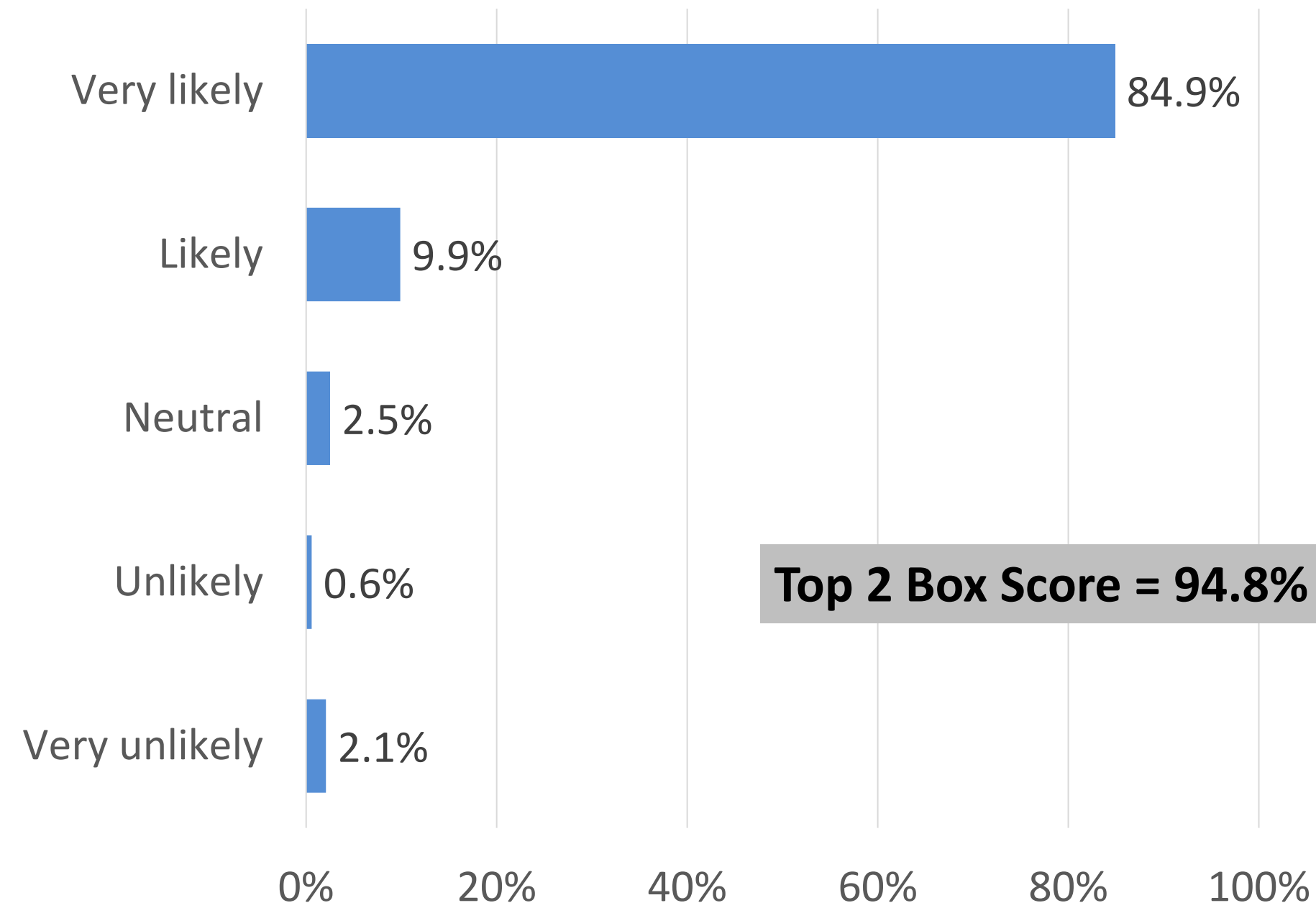
Top 2 Box Score = 94.8%

Detail by Visitor Type

	Total	In State	Out of State	City of Wilmington	Wrightsville Beach	Carolina Beach	Kure Beach
Top 2 Box Score	94.8%	93.7%	96.1%	94.8%	93.6%	96.1%	95.8%
Very likely	84.9%	83.2%	87.2%	86.0%	83.1%	87.0%	87.0%
Likely	9.9%	10.6%	8.9%	8.8%	10.6%	9.1%	8.8%
Neutral	2.5%	2.6%	2.5%	2.8%	3.0%	1.7%	1.7%
Unlikely	0.6%	0.6%	0.6%	0.6%	0.6%	0.4%	0.2%
Very unlikely	2.1%	3.1%	0.8%	1.9%	2.7%	1.8%	2.3%
Base	1,227	704	509	898	538	742	549

Question: How likely are you to return to Wilmington and Beaches? (Select one)
Base: All recent visitors. 1,227 completed surveys.

SATISFACTION WITH VISITOR EXPERIENCE

In line with their high likelihood to return, nearly all recent visitors were "satisfied" (24.5%) or "very satisfied" (71.0%) with their visitor experience in Wilmington and Beaches.

Figure 23: Satisfaction with Visitor Experience
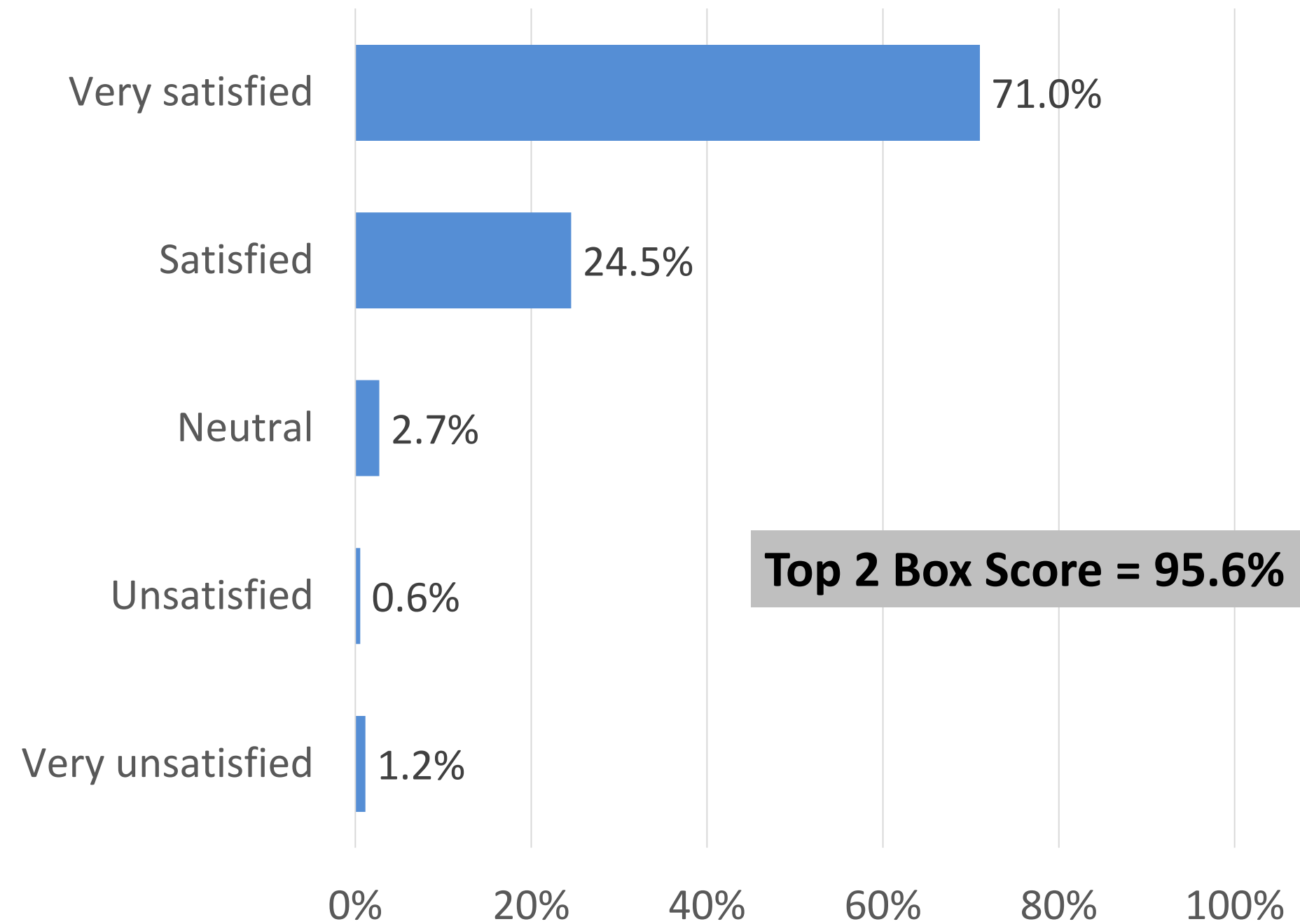
Top 2 Box Score = 95.6%

Detail by Visitor Type

	Total	In State	Out of State	City of Wilmington	Wrightsville Beach	Carolina Beach	Kure Beach
Top 2 Box Score	95.6%	93.8%	97.8%	95.5%	94.3%	95.8%	95.8%
Very satisfied	71.0%	65.6%	77.7%	71.3%	67.9%	73.2%	74.2%
Satisfied	24.5%	28.2%	20.1%	24.2%	26.3%	22.6%	21.5%
Neutral	2.7%	3.8%	1.3%	3.3%	3.5%	2.7%	2.4%
Unsatisfied	0.6%	0.9%	0.1%	0.4%	0.9%	0.5%	0.2%
Very unsatisfied	1.2%	1.4%	0.8%	0.8%	1.3%	1.0%	1.6%
Base	1,227	704	509	898	538	742	549

Question: How satisfied were you with your visitor experience in Wilmington and Beaches? (Select one)
Base: All recent visitors. 1,227 completed surveys.

Recent visitors who reported being satisfied or very satisfied with their experience reported that the reasons for their level of satisfaction were the relaxing experience, quality of restaurants, friendly locals, beaches, and the beauty of the area, each written in by one-tenth or more of satisfied visitors.

Figure 24: Reasons for Level of Satisfaction—Satisfied Visitors

Relaxing experience — 13.7%
Quality of restaurants — 13.3%
Friendliness of people — 13.2%
Beach — 12.6%
Beautiful area — 12.1%
Ambiance/atmosphere — 7.2%
Cleanliness — 6.9%
Quality of the beaches — 6.9%
Been here before — 6.7%
Availability of amenities/things to do — 5.9%
Niceness of area — 5.7%
Accessibility — 5.6%
Not crowded — 5.4%
Lodging/accommodations — 5.1%

Detail by Visitor Type

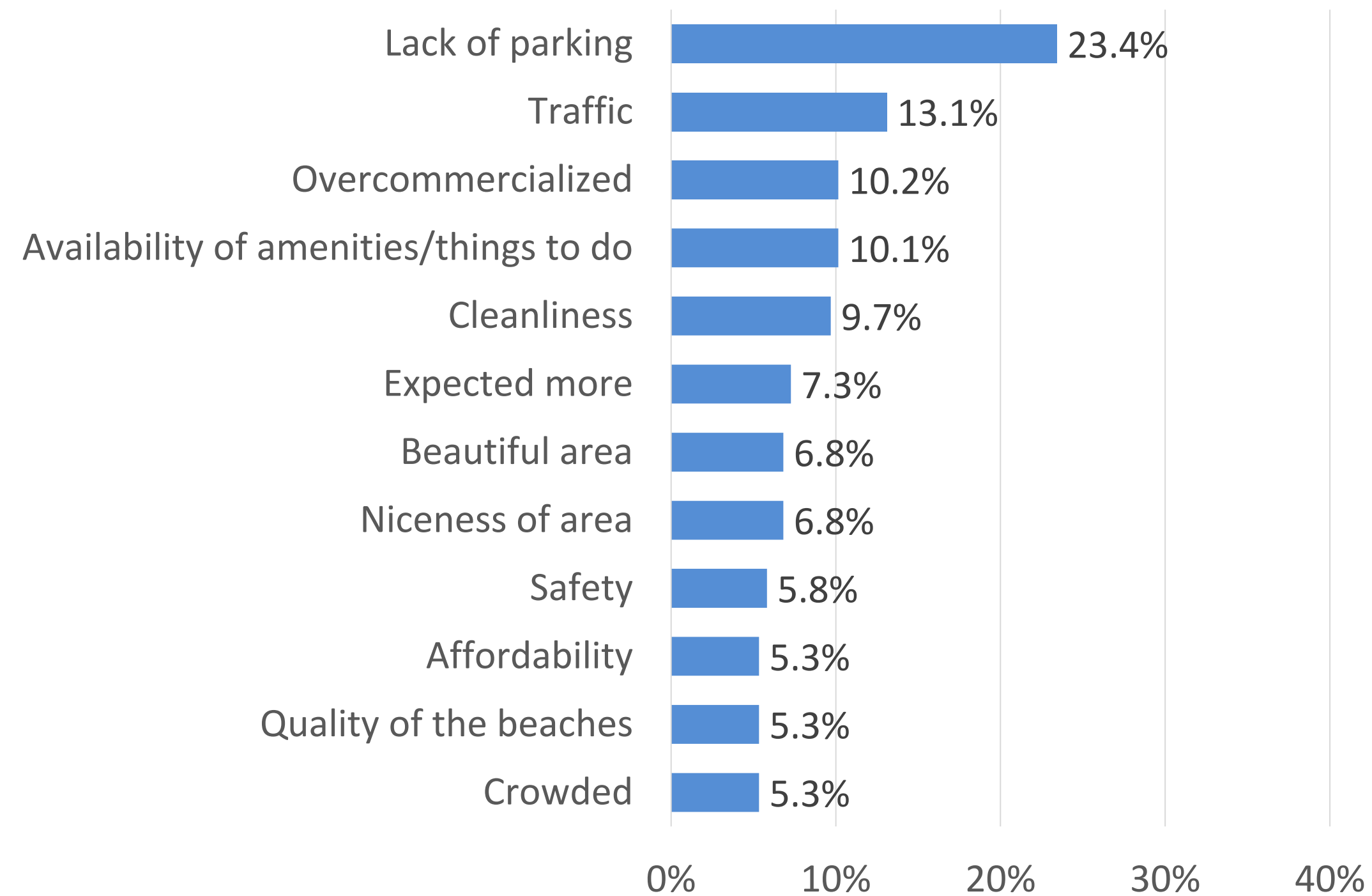|	Total	In State	Out of State	City of Wilmington	Wrightsville Beach	Carolina Beach	Kure Beach
Relaxing experience	13.7%	14.8%	12.9%	13.2%	9.6%	17.0%	18.8%
Quality of restaurants	13.3%	13.6%	13.4%	15.4%	15.2%	12.1%	10.7%
Friendliness of people	13.2%	11.0%	16.1%	14.5%	15.1%	15.3%	15.1%
Beach	12.6%	12.3%	12.5%	12.0%	15.1%	13.7%	13.5%
Beautiful area	12.1%	11.5%	12.9%	13.6%	13.7%	11.8%	11.6%
Ambiance/atmosphere	7.2%	6.9%	7.1%	6.9%	4.6%	7.0%	9.1%
Cleanliness	6.9%	5.9%	8.2%	6.7%	7.9%	6.1%	5.8%
Quality of the beaches	6.9%	7.5%	5.5%	6.3%	9.2%	6.7%	7.6%
Been here before	6.7%	6.7%	7.0%	6.4%	5.2%	6.8%	7.3%
Availability of amenities/things to do	5.9%	5.4%	6.7%	7.6%	4.9%	5.7%	5.3%
Niceness of area	5.7%	5.0%	6.9%	6.2%	6.3%	6.2%	6.0%
Accessibility	5.6%	7.4%	3.6%	5.2%	6.2%	5.8%	4.7%
Not crowded	5.4%	4.1%	7.2%	5.1%	4.4%	5.7%	7.4%
Lodging/accommodations	5.1%	5.4%	4.4%	4.3%	5.6%	5.3%	4.5%
Base	924	519	392	678	400	561	414

Question: Why were you satisfied/dissatisfied with your visitor experience in Wilmington and Beaches?
Base: All recent visitors who were "Satisfied" or "Very satisfied" with their visitor experience. 924 completed surveys.

Lack of parking (23.4%), traffic (13.1%), over-commercialization (10.2%), availability of amenities and things to do (10.1%) and cleanliness (9.7%) were the most common reasons for being neutral or unsatisfied with the visitor experience in Wilmington and Beaches.

Note: Given the small sample size, this data should be used for informational purposes only.

Figure 25: Reasons for Level of Satisfaction—Unsatisfied Visitors

Detail by Visitor Type

	Total	In State	Out of State	City of Wilmington	Wrightsville Beach	Carolina Beach	Kure Beach
Lack of parking	23.4%	21.1%	30.7%	24.9%	24.4%	22.9%	27.8%
Traffic	13.1%	10.3%	21.8%	17.1%	26.0%	15.1%	12.0%
Overcommercialized	10.2%	13.4%	0.0%	8.8%	6.8%	6.7%	4.4%
Availability of amenities/things to do	10.1%	13.4%	0.0%	8.2%	3.8%	17.5%	13.1%
Cleanliness	9.7%	12.8%	0.0%	8.2%	13.5%	5.9%	0.0%
Expected more	7.3%	2.6%	21.8%	9.5%	10.6%	12.6%	16.4%
Beautiful area	6.8%	9.0%	0.0%	4.4%	6.8%	5.9%	7.7%
Niceness of area	6.8%	9.0%	0.0%	0.0%	6.8%	5.9%	7.7%
Safety	5.8%	4.5%	9.9%	7.6%	11.5%	10.1%	5.5%
Affordability	5.3%	2.6%	13.9%	7.0%	6.8%	9.2%	12.0%
Quality of the beaches	5.3%	2.6%	13.9%	7.0%	10.6%	3.3%	12.0%
Crowded	5.3%	2.6%	13.9%	7.0%	6.8%	9.2%	12.0%
Base	45	33	12	34	21	29	21

Question: Why were you satisfied/dissatisfied with your visitor experience in Wilmington and Beaches?
Base: All recent visitors who were "Neutral," "Unsatisfied" or "Very unsatisfied" with their visitor experience. 45 completed surveys.

Wilmington and Beaches
Destination Brand Metrics

FAMILIARITY WITH WILMINGTON AND BEACHES DESTINATIONS

Leisure travelers surveyed have the highest levels of familiarity with Wilmington and Carolina Beach. Leisure travelers, or non-residents, were presented with a set list of four key destinations within Wilmington and Beaches and asked to rate their level of familiarity with each using a five-point scale. About three-quarters or more of non-residents said that they are "familiar" or "very familiar" with Wilmington (83.5%) and Carolina Beach (74.3%). For all key destinations tested, recent visitors had the highest level of familiarity while non-visitors, or those who have never visited Wilmington and Beaches, had the relatively lowest levels of familiarity with each destination.

Figure 26: Familiarity with Wilmington and Beaches Destinations
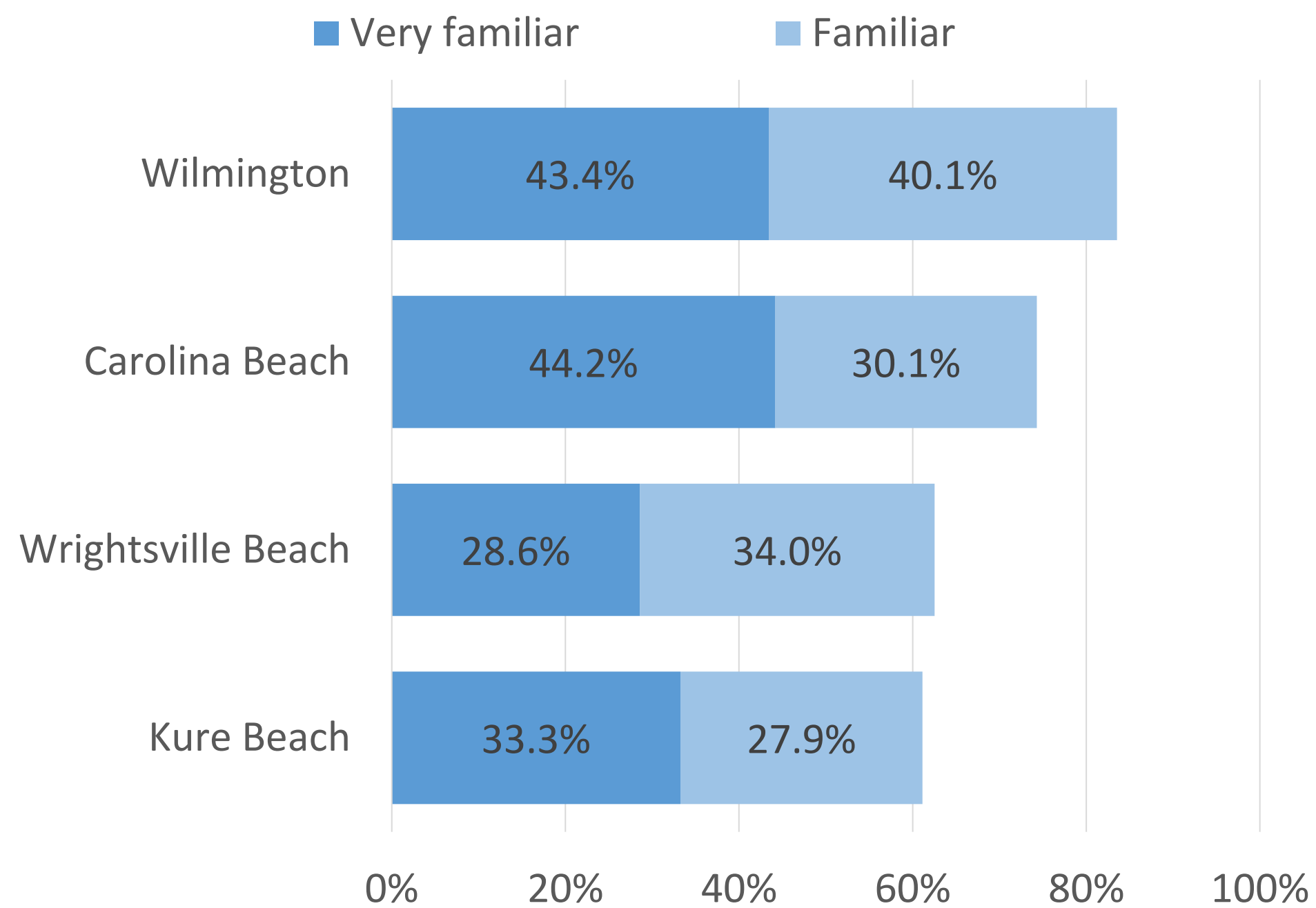
Detail by Visitor Type
(percent who are "Familiar" or "Very Familiar")

	Total	In State	Out of State	City of Wilmington	Wrightsville Beach	Carolina Beach	Kure Beach
Wilmington	83.5%	90.8%	90.0%	94.9%	94.1%	88.6%	86.2%
Carolina Beach	74.3%	84.0%	79.7%	79.9%	74.1%	94.9%	94.1%
Wrightsville Beach	62.5%	73.3%	60.8%	69.6%	90.7%	59.8%	55.0%
Kure Beach	61.1%	70.6%	68.2%	65.4%	58.4%	79.6%	91.7%
Base	1,763	704	509	898	538	742	549

Question: How familiar are you with each of these destinations? Please use the scale below where "1" equals "Very unfamiliar" and "5" equals "Very familiar."
Base: All non-residents. 1,763 completed surveys.

LIKELIHOOD TO RECOMMEND WILMINGTON AND BEACHES

Leisure travelers surveyed are highly likely to recommend Wilmington and Beaches as a destination to visit. Leisure travelers were asked to rate their likelihood to recommend Wilmington and Beaches as a place to visit for leisure using a scale from "0 - Not at all likely" to "10 - Extremely likely." They gave an average likelihood to recommend score of 8.8. Recent visitors gave a higher score of 9.1, while non-visitors gave a score of 8.4. The largest proportion of leisure travelers, 53.6 percent, gave a score of "10 - Extremely likely."

Figure 27: Likelihood to Recommend Wilmington and Beaches
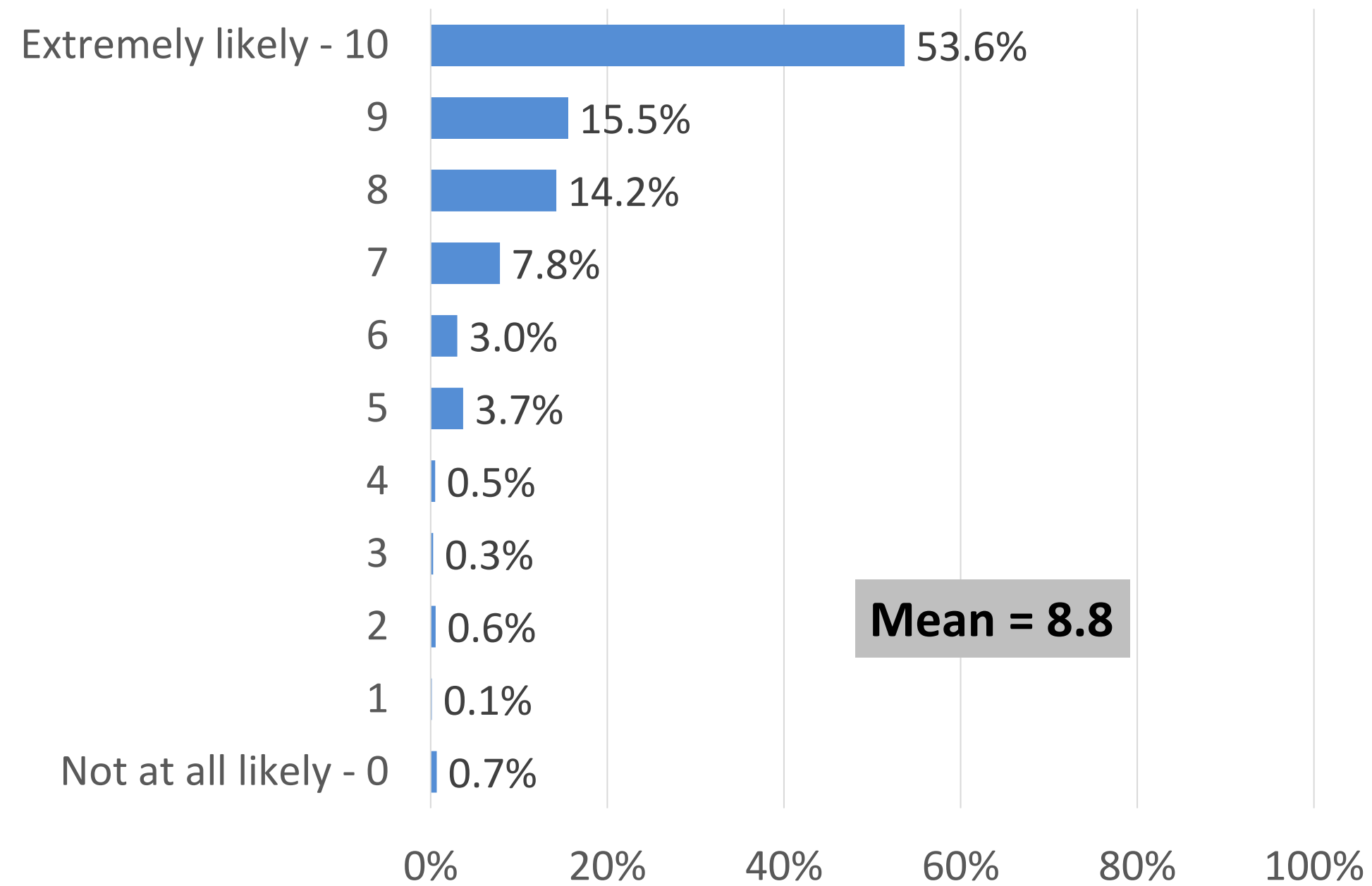
Extremely likely - 10: 53.6%
9: 15.5%
8: 14.2%
7: 7.8%
6: 3.0%
5: 3.7%
4: 0.5%
3: 0.3%
2: 0.6%
1: 0.1%
Not at all likely - 0: 0.7%

Mean = 8.8

Detail by Visitor Type

	Total	In State	Out of State	City of Wilmington	Wrightsville Beach	Carolina Beach	Kure Beach
Extremely likely - 10	53.6%	56.9%	60.0%	58.0%	58.1%	59.5%	61.3%
9	15.5%	14.8%	17.7%	16.7%	15.5%	16.0%	15.5%
8	14.2%	13.5%	11.6%	11.9%	12.5%	12.8%	10.7%
7	7.8%	8.5%	4.6%	6.7%	6.9%	5.7%	6.3%
6	3.0%	2.7%	1.5%	2.1%	2.3%	2.2%	2.6%
5	3.7%	2.3%	2.4%	2.8%	1.8%	2.0%	1.5%
4	0.5%	0.4%	0.6%	0.4%	0.6%	0.6%	0.5%
3	0.3%	0.2%	0.3%	0.3%	0.6%	0.4%	0.5%
2	0.6%	0.4%	0.9%	0.6%	0.8%	0.4%	0.6%
1	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Not at all likely - 0	0.7%	0.4%	0.6%	0.4%	0.8%	0.4%	0.5%
Mean	8.8	9.0	9.1	9.0	9.0	9.1	9.1
Base	1,763	704	509	898	538	742	549

Question: How likely are you to recommend Wilmington and Beaches as a place to visit for leisure? Please use the eleven-point scale below, where 0 means "Not at all likely" and 10 equals "Extremely likely."
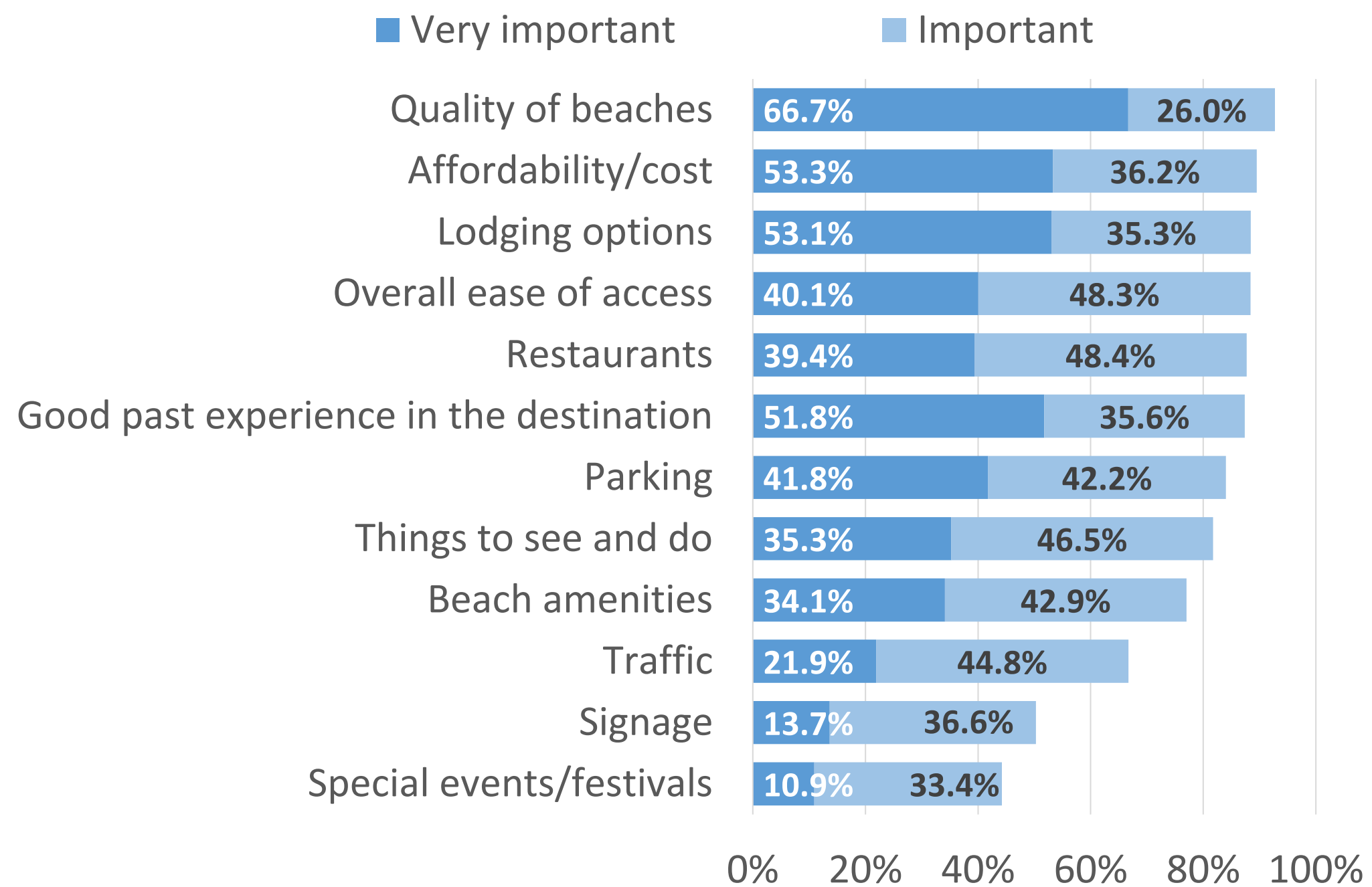Base: All non-residents. 1,763 completed surveys.

Marketing
Wilmington and Beaches

The quality of beaches, affordability/cost and lodging options are the most important attributes in selecting leisure destinations. All leisure travelers surveyed were asked to imagine taking a leisure trip to a coastal destination in the Southeast region of the U.S. and were then asked to rate how important a set list of attributes would be in evaluating which destination to visit for such a trip. Three-quarters or more of all non-residents rated nearly all destination attributes tested to be "important" or "very important." The relatively least important attributes in selecting a coastal destination in the Southeast are traffic, signage and special events.

Figure 28: Attributes Important to Destination Selection

Detail by Visitor Type
(percent rating each as "Important" or "Very Important")

	Total	In State	Out of State	City of Wilmington	Wrightsville Beach	Carolina Beach	Kure Beach
Quality of beaches	92.7%	92.8%	93.9%	92.6%	93.6%	93.2%	93.0%
Affordability/cost	89.5%	89.8%	88.0%	89.5%	86.3%	88.8%	89.4%
Lodging options	88.4%	84.9%	88.7%	87.2%	87.9%	85.1%	87.9%
Overall ease of access	88.4%	89.7%	88.1%	88.3%	88.8%	88.6%	88.4%
Restaurants	87.7%	88.5%	86.7%	89.1%	89.4%	87.2%	85.8%
Good past experience in the destination	87.4%	89.4%	92.3%	90.6%	91.0%	90.5%	90.6%
Parking	84.0%	86.1%	81.4%	84.1%	85.6%	82.8%	82.3%
Things to see and do	81.7%	78.7%	83.0%	83.0%	82.8%	83.1%	80.0%
Beach amenities	77.0%	77.9%	77.5%	78.4%	80.7%	77.7%	77.8%
Traffic	66.7%	68.6%	65.3%	66.6%	68.6%	65.5%	65.9%
Signage	50.3%	51.3%	48.0%	50.1%	53.5%	49.3%	48.8%
Special events/festivals	44.3%	47.1%	47.2%	48.1%	49.5%	48.5%	45.1%
Base	1,763	704	509	898	538	742	549

Question: Imagine that you'd like to take a leisure trip to a coastal destination in the Southeast region of the U.S. In general, how important would each of the following be in evaluating which destination you want to visit for such a trip? Please use the scale below where "1" equals "Very unimportant" and "5" equals "Very important" to answer for each.
Base: All non-residents. 1,763 completed surveys.

The City of Wilmington performs highly for things to see and do, signage and special events, however these attributes are relatively less important in selecting leisure coastal destinations in the Southeast.
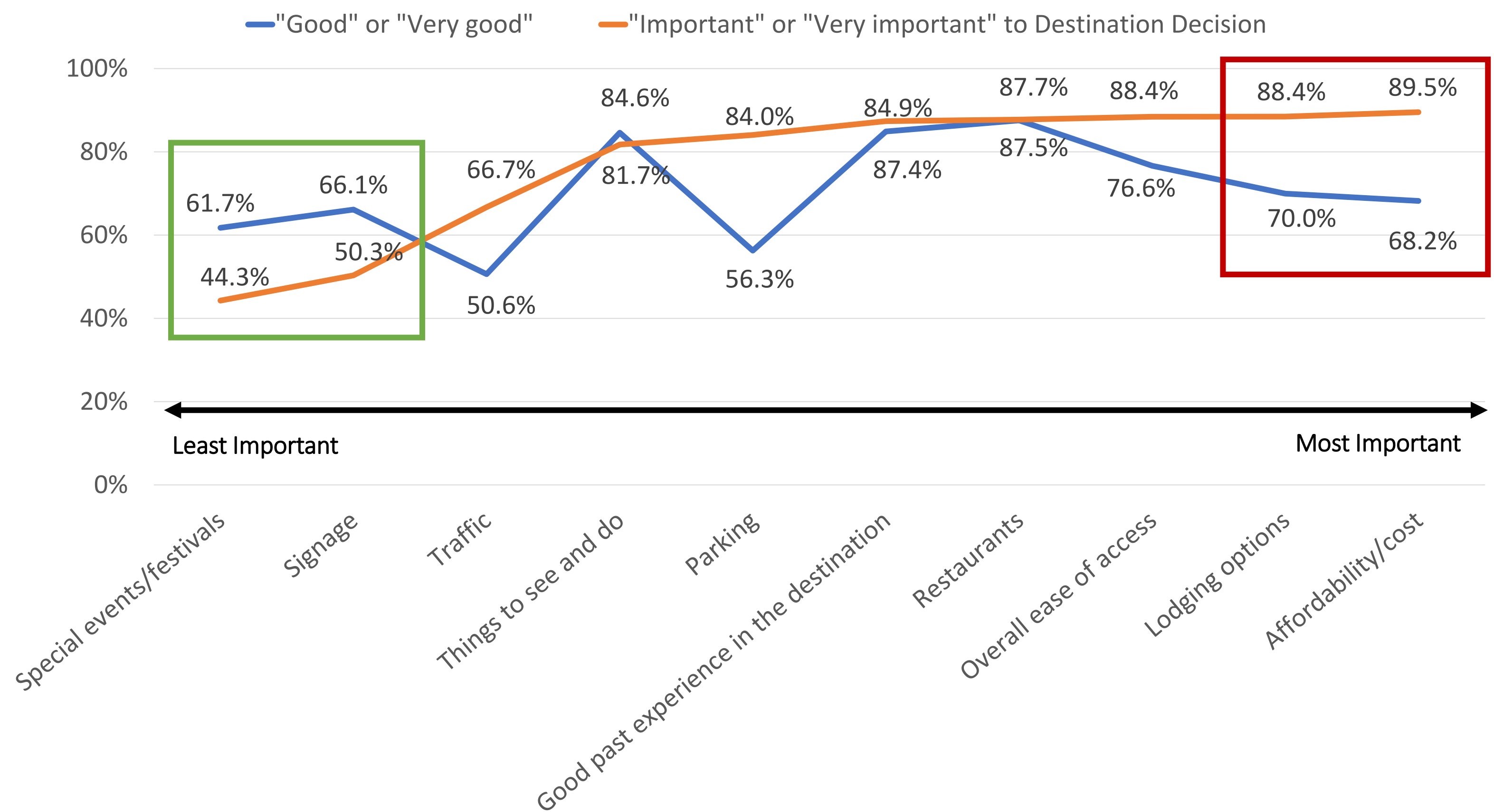
The chart at right maps the percent of leisure travelers who rated each attribute "important" or "very important" in selecting leisure destinations (orange line) against the percent who rated each attribute as "good" or "very good" in Wilmington (blue line). As highlighted by the green boxes, Wilmington overperforms for signage and events (blue line surpasses orange line). Wilmington performs on par for restaurants, good past experiences and things to see and do.

However, Wilmington underperforms for the other tested attributes, most specifically the ones that are most important to selecting destinations—lodging options and affordability (red box). Marketing messaging around Wilmington's accommodations and affordability may help drive consumer perceptions and boost the city's ratings for these attributes.

Question: Imagine that you'd like to take a leisure trip to a coastal destination in the Southeast region of the U.S. In general, how important would each of the following be in evaluating which destination you want to visit for such a trip?
Question: Now think about Wilmington as a place to visit. Please use the scale below where "1" equals "Very poor" and "5" equals "Very good" to evaluate each attribute of Wilmington as a place to visit. Base: All non-residents. 1,763 completed surveys.

Figure 29: Attribute Importance vs. Wilmington's Rating

Legend: ■—"Good" or "Very good"   ■—"Important" or "Very important" to Destination Decision

Data values:
- Special events/festivals: 61.7% (Good), 44.3% (Important)
- Signage: 66.1% (Good), 50.3% (Important)
- Traffic: 50.6% (Good), 66.7% (Important)
- Things to see and do: 84.6% (Good), 81.7% (Important)
- Parking: 56.3% (Good), 84.0% (Important)
- Good past experience in the destination: 87.4% (Good), 84.9% (Important)
- Restaurants: 87.5% (Good), 87.7% (Important)
- Overall ease of access: 76.6% (Good), 88.4% (Important)
- Lodging options: 70.0% (Good), 88.4% (Important)
- Affordability/cost: 68.2% (Good), 89.5% (Important)

Least Important ←———————————————————→ Most Important

Wrightsville Beach performs on par for signage and special events.

Meanwhile, Wrightsville Beach underperforms for all other attributes tested. While it was rated highest for quality of beaches (76.7%), this rating is below this attribute's importance in evaluating coastal destinations in the Southeast.

Figure 30: Attribute Importance vs. Wrightsville Beach's Rating

Question: Imagine that you'd like to take a leisure trip to a coastal destination in the Southeast region of the U.S. In general, how important would each of the following be in evaluating which destination you want to visit for such a trip?
Question: Now think about Wrightsville Beach as a place to visit. Please use the scale below where "1" equals "Very poor" and "5" equals "Very good" to evaluate each attribute of Wilmington as a place to visit. Base: All non-residents. 1,763 completed surveys.

ATTRIBUTE IMPORTANCE vs. CAROLINA BEACH'S RATING

Similar to the City of Wilmington, Carolina Beach performs well for signage as well as special events.

Carolina Beach's ratings for signage and special events surpass these attributes' level of importance in selecting leisure destinations. And while quality of beaches was Carolina Beach's highest rated attribute, at 81.3 percent, it falls below the relative importance in evaluating destinations (92.7%).

Question: Imagine that you'd like to take a leisure trip to a coastal destination in the Southeast region of the U.S. In general, how important would each of the following be in evaluating which destination you want to visit for such a trip?
Question: Now think about Carolina Beach as a place to visit. Please use the scale below where "1" equals "Very poor" and "5" equals "Very good" to evaluate each attribute of Wilmington as a place to visit. Base: All non-residents. 1,763 completed surveys.

Figure 31: Attribute Importance vs. Carolina Beach's Rating

Kure Beach's attribute ratings mapped against the importance of attributes in evaluating leisure coastal destinations is similar to that of Wrightsville Beach.

Kure Beach performs on par for signage, yet underperforms for all other destination attributes tested.

For all three beaches, the largest gaps were for lodging options and parking. This highlights an opportunity to market the three beaches'—as well as the overall Wilmington and Beaches destination's—lodging options and parking situation, including availability and cost.

Question: Imagine that you'd like to take a leisure trip to a coastal destination in the Southeast region of the U.S. In general, how important would each of the following be in evaluating which destination you want to visit for such a trip?
Question: Now think about Kure Beach as a place to visit. Please use the scale below where "1" equals "Very poor" and "5" equals "Very good" to evaluate each attribute of Wilmington as a place to visit. Base: All non-residents. 1,763 completed surveys.

Figure 32: Attribute Importance vs. Kure Beach's Rating

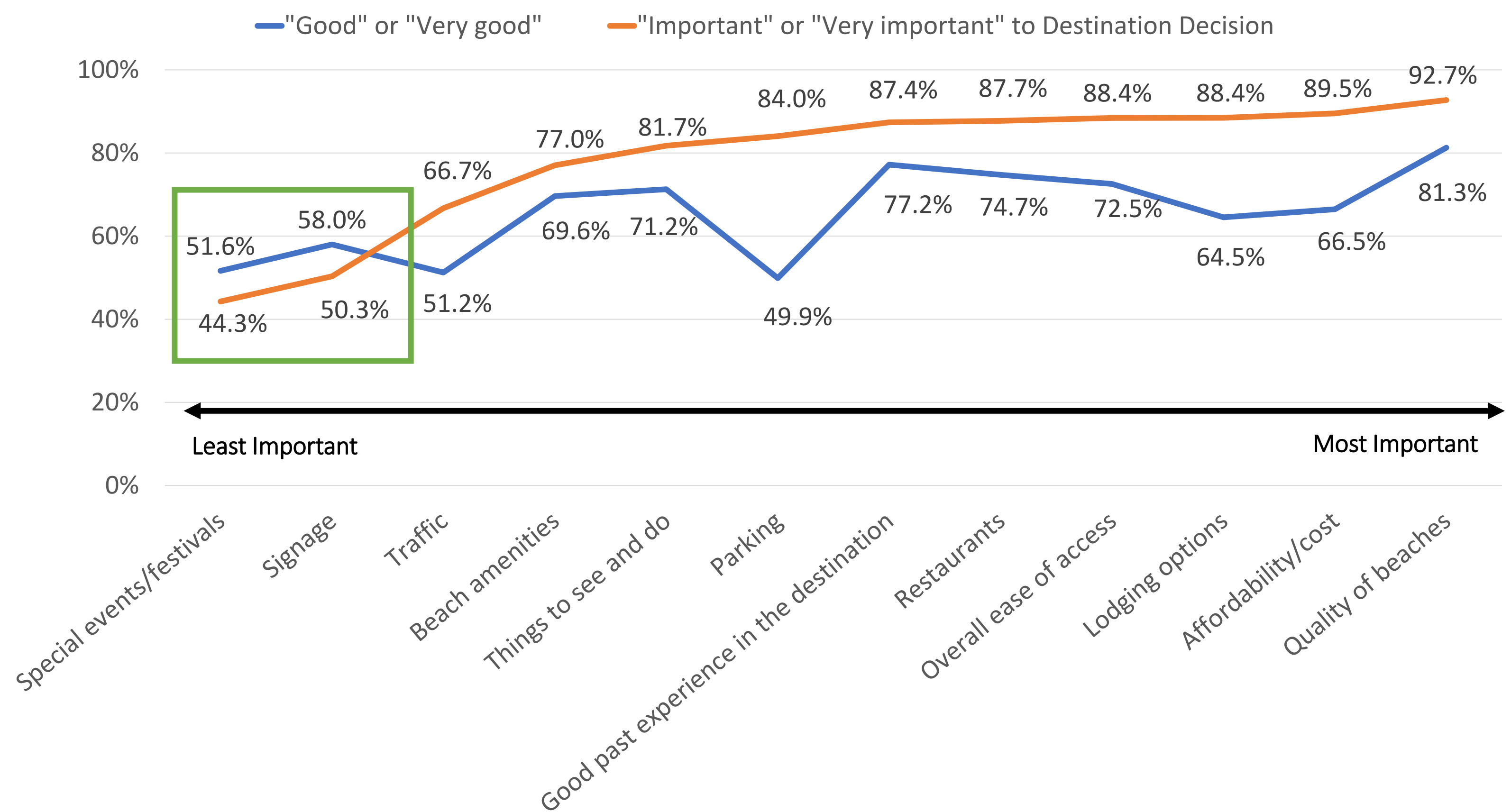Legend: — "Good" or "Very good"   — "Important" or "Very important" to Destination Decision

"Important" or "Very important" to Destination Decision line values: 44.3%, 50.4%, 66.7%, 77.0%, 81.7%, 84.0%, 87.4%, 87.7%, 88.4%, 88.4%, 89.5%, 92.7%

"Good" or "Very good" line values: 38.4%, 50.3%, 54.4%, 57.1%, 56.6%, 47.5%, 67.8%, 58.3%, 64.3%, 47.9%, 57.4%, 72.5%

X-axis (Least Important → Most Important): Special events/festivals, Signage, Traffic, Beach amenities, Things to see and do, Parking, Good past experience in the destination, Restaurants, Overall ease of access, Lodging options, Affordability/cost, Quality of beaches

Nearly 60 percent of leisure travelers surveyed consider Wilmington, Wrightsville Beach, Carolina Beach and Kure Beach to be four unique destinations with distinct identities (58.4%). Meanwhile, over one-third consider these four destinations to be one destination with Wilmington as the anchor city (35.9%). Recent visitors were more likely to consider them as four unique destinations with distinct identities (63.1%), and lapsed visitors were the likeliest visitor segment to consider them one destination with Wilmington as the anchor city (39.6%). Out of state visitors were also more likely than in state visitors to consider Wilmington and Beaches one destination with Wilmington as the anchor city (39.2% vs. 30.3%).

Figure 33: Wilmington and Beaches Destination Perception
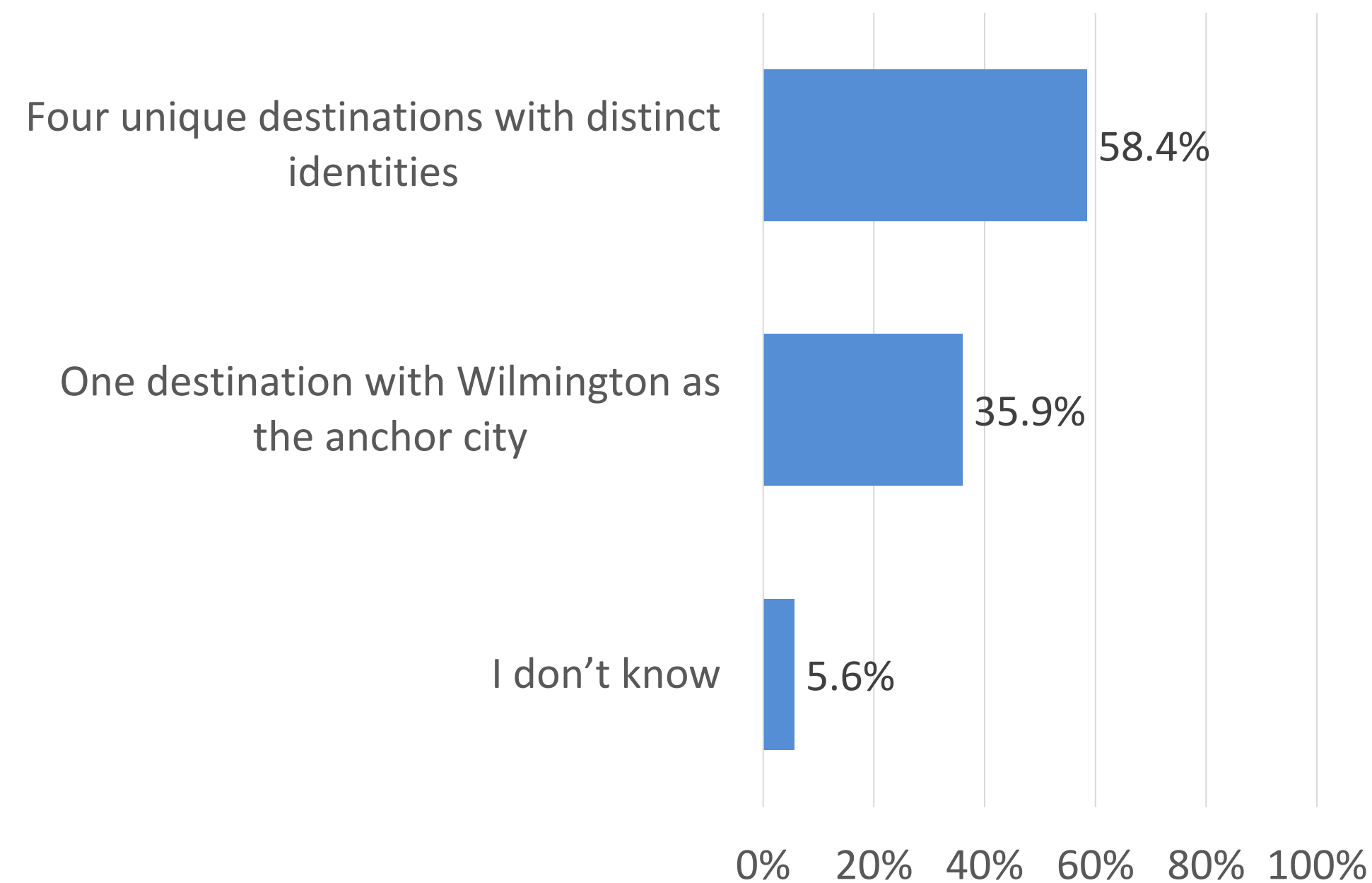
Detail by Visitor Type

	Total	In State	Out of State	City of Wilmington	Wrightsville Beach	Carolina Beach	Kure Beach
Four unique destinations with distinct identities	58.4%	66.8%	58.3%	57.7%	58.8%	64.2%	67.0%
One destination with Wilmington as the anchor city	35.9%	30.3%	39.2%	40.3%	39.3%	32.9%	31.2%
I don't know	5.6%	2.9%	2.5%	2.0%	1.8%	2.9%	1.8%
Base	1,763	704	509	898	538	742	549

Question: When you think of Wilmington, Wrightsville Beach, Carolina Beach and Kure Beach, do you consider them to be one destination with Wilmington as the anchor city or four unique destinations with distinct identities? (Select one)
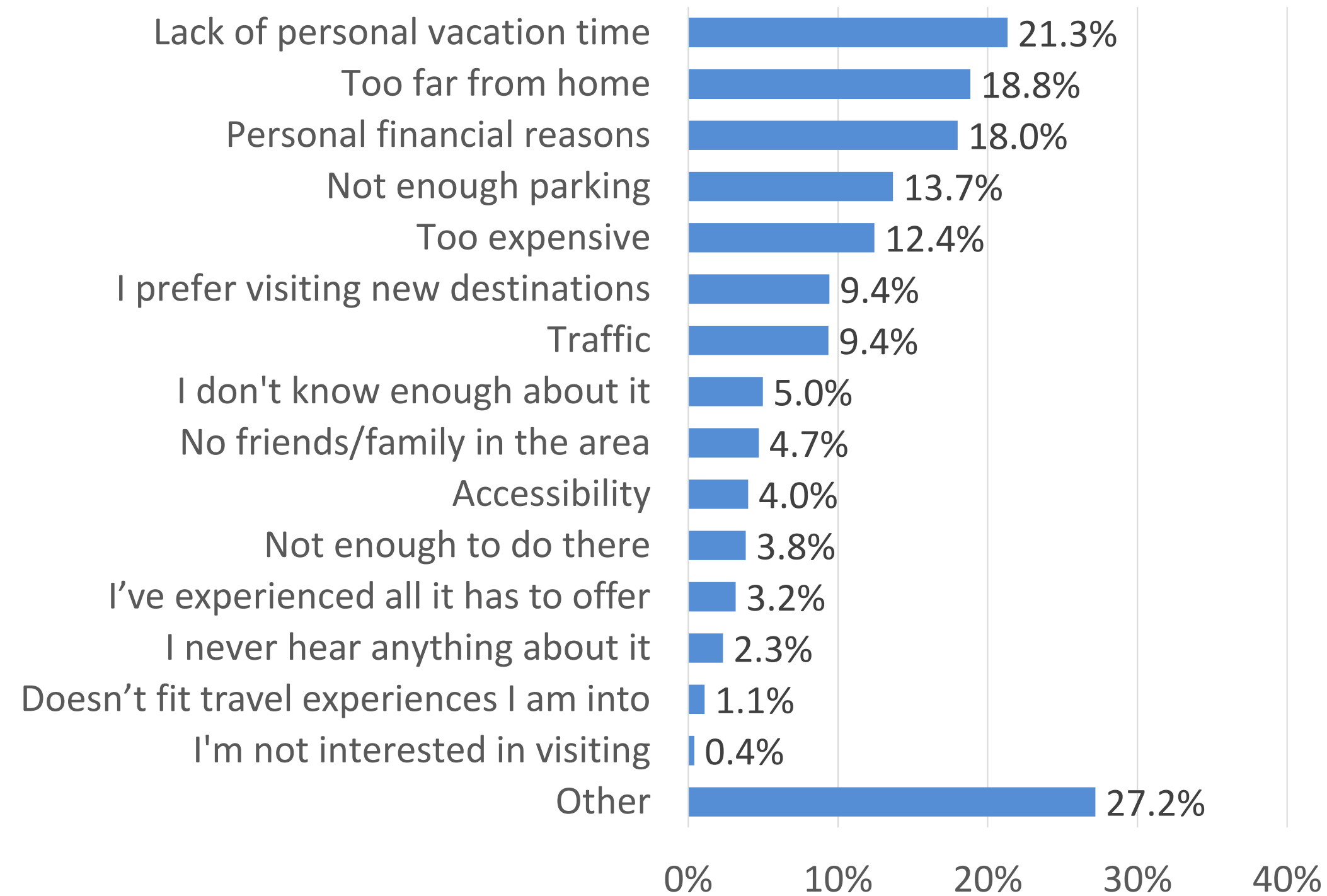Base: All non-residents. 1,763 completed surveys.

DETERRENTS TO VISITING WILMINGTON AND BEACHES

The most common reasons that keep travelers from visiting Wilmington and Beaches are lack of personal vacation time, being too far from home and personal financial reasons, each selected by nearly one-in-five or more leisure travelers surveyed. Additionally, with parking being the top recommendation for enhancing the visitor experience (Figure 19), 13.7 percent of travelers reported that lack of parking was a deterrent. Meanwhile, 13.7 percent said that Wilmington and Beaches lacks affordability. In marketing to potential visitors, it may be worthwhile to develop messaging around parking and affordability.

Figure 34: Deterrents to Visiting Wilmington and Beaches

Lack of personal vacation time — 21.3%
Too far from home — 18.8%
Personal financial reasons — 18.0%
Not enough parking — 13.7%
Too expensive — 12.4%
I prefer visiting new destinations — 9.4%
Traffic — 9.4%
I don't know enough about it — 5.0%
No friends/family in the area — 4.7%
Accessibility — 4.0%
Not enough to do there — 3.8%
I've experienced all it has to offer — 3.2%
I never hear anything about it — 2.3%
Doesn't fit travel experiences I am into — 1.1%
I'm not interested in visiting — 0.4%
Other — 27.2%

Question: In general, what keeps you from visiting Wilmington and Beaches?
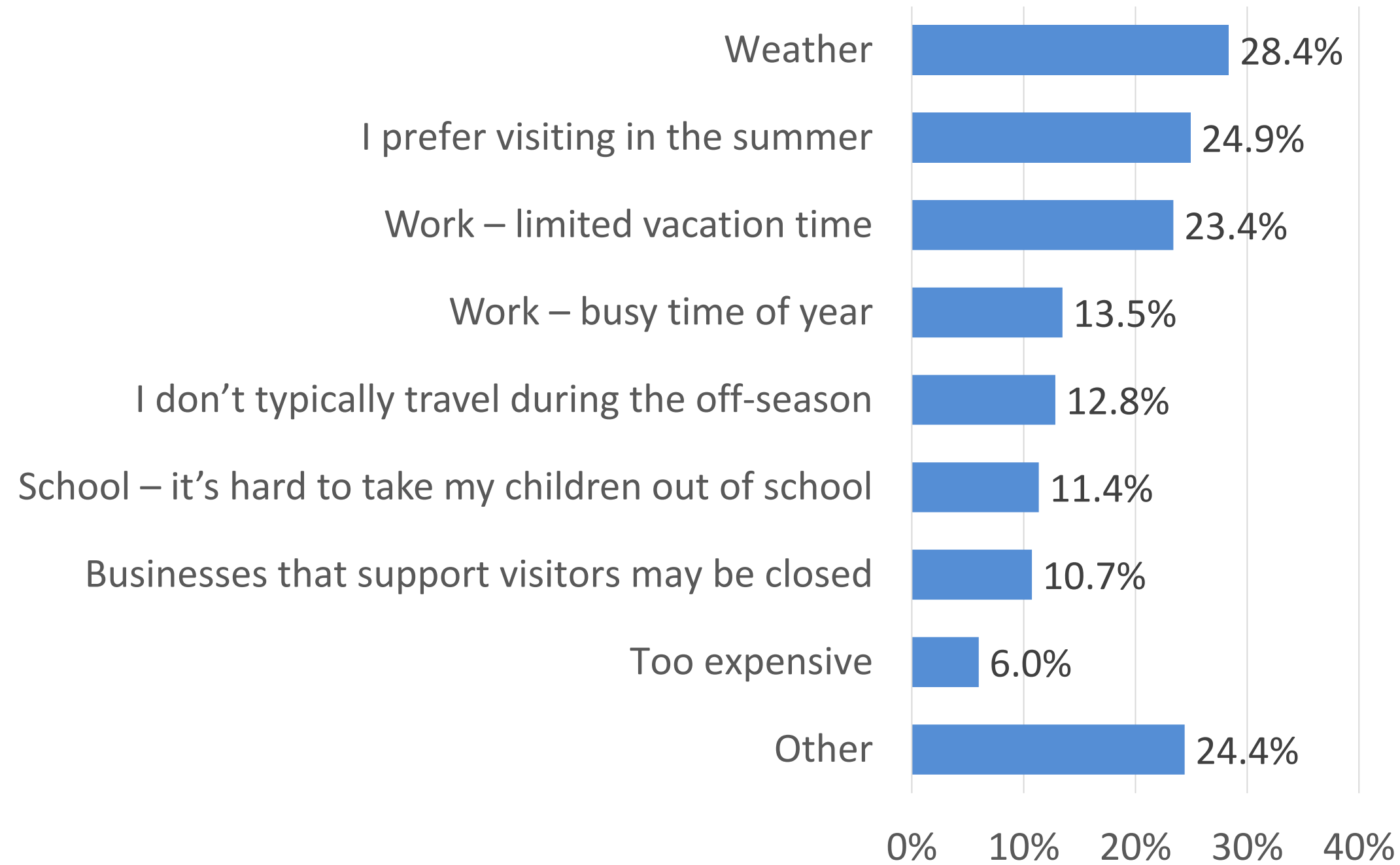(Select all that apply) Base: All non-residents. 1,763 completed surveys.

Detail by Visitor Type

	Total	In State	Out of State	City of Wilmington	Wrightsville Beach	Carolina Beach	Kure Beach
Lack of personal vacation time	21.3%	19.6%	21.0%	20.7%	19.4%	23.3%	22.0%
Too far from home	18.8%	6.6%	28.1%	19.1%	17.5%	15.0%	16.5%
Personal financial reasons	18.0%	17.5%	10.6%	15.0%	13.8%	16.1%	17.0%
Not enough parking	13.7%	23.0%	10.2%	17.1%	21.3%	17.0%	16.1%
Too expensive	12.4%	17.6%	6.9%	12.8%	13.7%	13.2%	14.9%
I prefer visiting new destinations	9.4%	7.3%	8.9%	9.5%	9.9%	6.4%	6.4%
Traffic	9.4%	14.2%	7.3%	11.3%	11.8%	9.8%	10.7%
I don't know enough about it	5.0%	2.4%	2.3%	2.0%	1.0%	2.5%	2.0%
No friends/family in the area	4.7%	2.0%	1.6%	1.9%	1.3%	1.7%	1.4%
Accessibility	4.0%	5.1%	3.3%	4.2%	4.8%	4.1%	4.9%
Not enough to do there	3.8%	4.2%	2.3%	3.5%	3.2%	3.2%	3.4%
I've experienced all it has to offer	3.2%	2.9%	2.5%	2.4%	2.4%	3.0%	2.4%
I never hear anything about it	2.3%	1.3%	1.4%	1.3%	1.1%	1.4%	1.0%
Doesn't fit travel experiences I am into	1.1%	1.3%	0.5%	0.9%	1.0%	0.8%	1.1%
I'm not interested in visiting	0.4%	0.6%	0.0%	0.2%	0.3%	0.5%	0.0%
Other	27.2%	27.3%	30.9%	26.8%	26.4%	29.0%	28.9%
Base	1,763	704	509	898	538	742	549

DETERRENTS TO VISITING IN THE FALL AND WINTER

When it comes to visiting Wilmington and Beaches in the Fall and Winter, the top deterrents are weather, the preference for visiting in the summer and limited vacation time due to work, each selected by nearly one-quarter or more of leisure travelers. Lapsed visitors, who have visited Wilmington and Beaches more than one year ago, were the likeliest segment to say that they prefer visiting in the summer (28.0%) and that they don't typically travel during the off-season (19.4%). Meanwhile, out of state visitors were more likely than in state visitors to report that limited vacation time was a deterrent (28.5% vs. 19.6%). While the majority of these deterrents are ones that can't be controlled by destination marketing, highlighting the destination's assets and experiences unique to the Fall and Winter may help generate interest in visiting during these seasons.

Figure 35: Deterrents to Visiting in the Fall and Winter

Weather — 28.4%
I prefer visiting in the summer — 24.9%
Work – limited vacation time — 23.4%
Work – busy time of year — 13.5%
I don't typically travel during the off-season — 12.8%
School – it's hard to take my children out of school — 11.4%
Businesses that support visitors may be closed — 10.7%
Too expensive — 6.0%
Other — 24.4%

Question: What keeps you from visiting Wilmington and Beaches in the fall and winter months between September and February? (Select all that apply)
Base: All non-residents. 1,763 completed surveys.

Detail by Visitor Type

	Total	In State	Out of State	City of Wilmington	Wrightsville Beach	Carolina Beach	Kure Beach
Weather	28.4%	27.7%	27.9%	27.5%	31.5%	29.0%	25.9%
I prefer visiting in the summer	24.9%	22.7%	23.9%	23.9%	24.8%	25.3%	25.5%
Work – limited vacation time	23.4%	19.6%	28.5%	25.6%	23.1%	25.6%	26.5%
Work – busy time of year	13.5%	12.6%	15.9%	14.9%	14.6%	14.8%	15.8%
I don't typically travel during the off-season	12.8%	7.1%	13.2%	9.5%	10.8%	10.8%	10.1%
School – it's hard to take my children out of school	11.4%	9.3%	12.2%	9.9%	10.4%	11.3%	13.4%
Businesses that support visitors may be closed	10.7%	10.9%	9.1%	10.3%	9.1%	10.9%	9.9%
Too expensive	6.0%	7.5%	2.8%	5.0%	5.8%	6.1%	6.9%
Other	24.4%	27.4%	20.6%	24.2%	21.5%	22.1%	21.9%
Base	1,763	704	509	898	538	742	549

Psychographic & Demographic Profile of Respondents

The following presents the psychographic and demographic details of all survey respondents. While the chart reflects the data for all respondents, details for in state visitors, out of state visitors and visitors of each of the four areas are presented in the data tables.

PSYCHOGRAPHIC STATEMENTS

As it relates to COVID-19, survey respondents are in most agreement that they will be unlikely to travel outside the United States until the Coronavirus Situation is resolved (85.3%). Respondents were presented with a set of statements to gauge their sentiments on the pandemic and the course to recovery and asked how much they agree with each. The chart at right shows the top-two box score (% who say they "agree" or "strongly agree") for each statement tested. Nearly four-in-five respondents also agree they will be unlikely to attend any conferences or conventions until the Coronavirus situation is resolved (78.6%). While a majority of all segments agree that they plan to avoid all travel until the Coronavirus situation blows over (64.8%), non-recent visitors were most in support of this (70.9%).

The statements that garnered the least agreement were feeling the Coronavirus situation will be resolved before the summer travel season (32.7%) and feeling comfortable going out in their own community (26.6%).
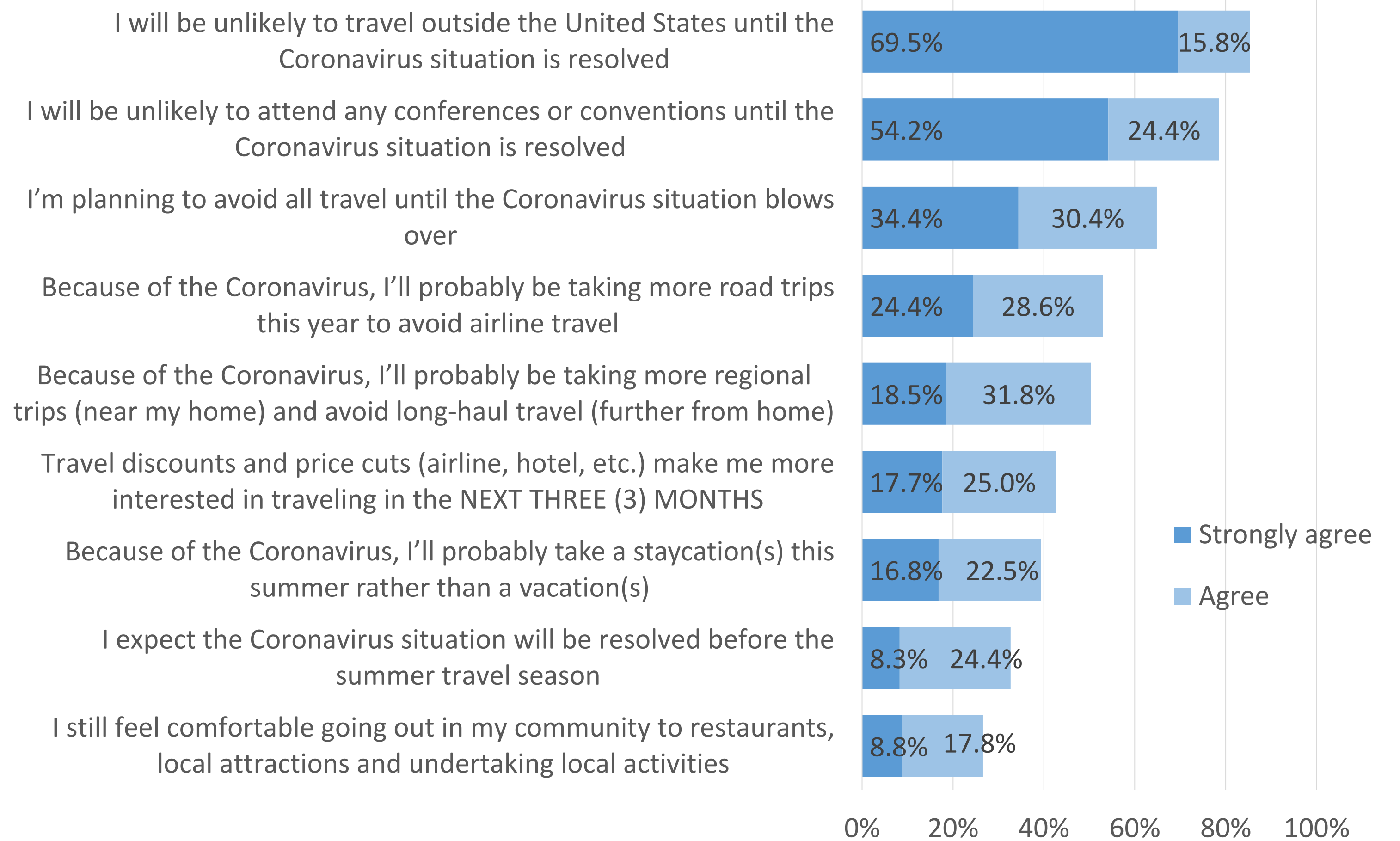
Full detail by segment available on next page.
Note: Survey data was collected at the onset of COVID-19 between April 6 – May 31, 2020.

Question: Please read the statements below and rate your level of agreement with each.
Base: All survey completes. 2,157 completed surveys.

Figure 36: Psychographic Statements

I will be unlikely to travel outside the United States until the Coronavirus situation is resolved — 69.5% / 15.8%

I will be unlikely to attend any conferences or conventions until the Coronavirus situation is resolved — 54.2% / 24.4%

I'm planning to avoid all travel until the Coronavirus situation blows over — 34.4% / 30.4%

Because of the Coronavirus, I'll probably be taking more road trips this year to avoid airline travel — 24.4% / 28.6%

Because of the Coronavirus, I'll probably be taking more regional trips (near my home) and avoid long-haul travel (further from home) — 18.5% / 31.8%

Travel discounts and price cuts (airline, hotel, etc.) make me more interested in traveling in the NEXT THREE (3) MONTHS — 17.7% / 25.0%

Because of the Coronavirus, I'll probably take a staycation(s) this summer rather than a vacation(s) — 16.8% / 22.5%

I expect the Coronavirus situation will be resolved before the summer travel season — 8.3% / 24.4%

I still feel comfortable going out in my community to restaurants, local attractions and undertaking local activities — 8.8% / 17.8%

Legend: ■ Strongly agree ■ Agree

0% 20% 40% 60% 80% 100%

PSYCHOGRAPHIC STATEMENTS

Detail by Visitor Type*

(Percent who "Agree" or "Strongly Agree" with each statement)

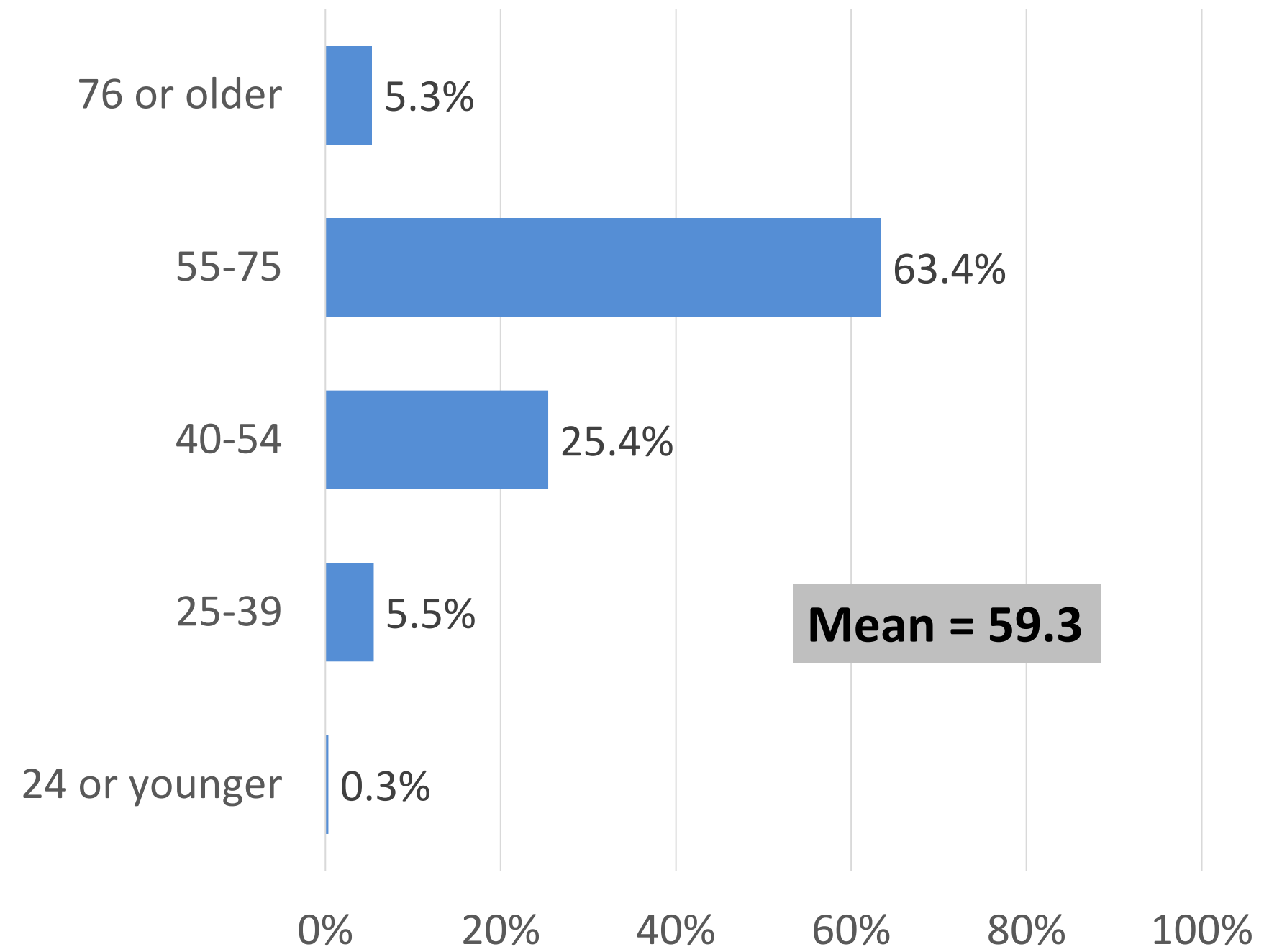|	Total	In State	Out of State	City of Wilmington	Wrightsville Beach	Carolina Beach	Kure Beach
I will be unlikely to travel outside the United States until the Coronavirus situation is resolved	85.3%	83.9%	82.9%	84.3%	83.8%	81.8%	81.7%
I will be unlikely to attend any conferences or conventions until the Coronavirus situation is resolved	78.6%	77.5%	71.3%	75.1%	74.6%	73.0%	69.3%
I'm planning to avoid all travel until the Coronavirus situation blows over	64.8%	61.9%	59.0%	61.0%	60.0%	57.0%	57.9%
Because of the Coronavirus, I'll probably be taking more road trips this year to avoid airline travel	53.0%	56.1%	47.2%	52.8%	55.3%	51.0%	51.8%
Because of the Coronavirus, I'll probably be taking more regional trips (near my home) and avoid long-haul travel (further from home)	50.3%	55.3%	36.8%	48.1%	49.0%	42.2%	40.9%
Travel discounts and price cuts (airline, hotel, etc.) make me more interested in traveling in the NEXT THREE (3) MONTHS	42.6%	49.9%	43.2%	46.4%	49.0%	48.9%	51.2%
Because of the Coronavirus, I'll probably take a staycation(s) this summer rather than a vacation(s)	39.3%	32.6%	27.7%	32.0%	33.2%	27.1%	22.8%
I expect the Coronavirus situation will be resolved before the summer travel season	32.7%	36.4%	38.6%	37.7%	32.5%	38.8%	42.0%
I still feel comfortable going out in my community to restaurants, local attractions and undertaking local activities	26.6%	29.1%	26.7%	28.3%	28.3%	30.3%	28.8%

Question: Please read the statements below and rate your level of agreement with each. Base: All survey completes. 2,157 completed surveys.

Note: Survey data was collected at the onset of COVID-19 between April 6 – May 31, 2020.

AGE

The average survey respondent was 59.3 years old.

Figure 37: Age

Mean = 59.3

Age	Percentage
76 or older	5.3%
55-75	63.4%
40-54	25.4%
25-39	5.5%
24 or younger	0.3%

Question: In which year were you born?
Base: All survey completes. 2,157 completed surveys.

Detail by Visitor Type

	Total	In State	Out of State	City of Wilmington	Wrightsville Beach	Carolina Beach	Kure Beach
76 or older	5.3%	4.5%	3.4%	3.8%	5.8%	2.3%	2.6%
55-75	63.4%	63.6%	64.1%	63.0%	65.3%	63.7%	61.4%
40-54	25.4%	27.1%	26.5%	27.9%	24.6%	28.0%	30.4%
25-39	5.5%	4.7%	5.5%	5.0%	3.9%	5.7%	5.1%
24 or younger	0.3%	0.1%	0.5%	0.4%	0.5%	0.3%	0.6%
Mean	59.3	59.5	58.6	58.9	59.7	58.4	58.0
Base	2,157	704	509	898	538	742	549

GENDER

The survey sample skewed female (67.9%).

Figure 38: Gender

- Female — 67.9%
- Male — 30.7%
- Other — 0.0%
- I prefer not to answer — 1.3%
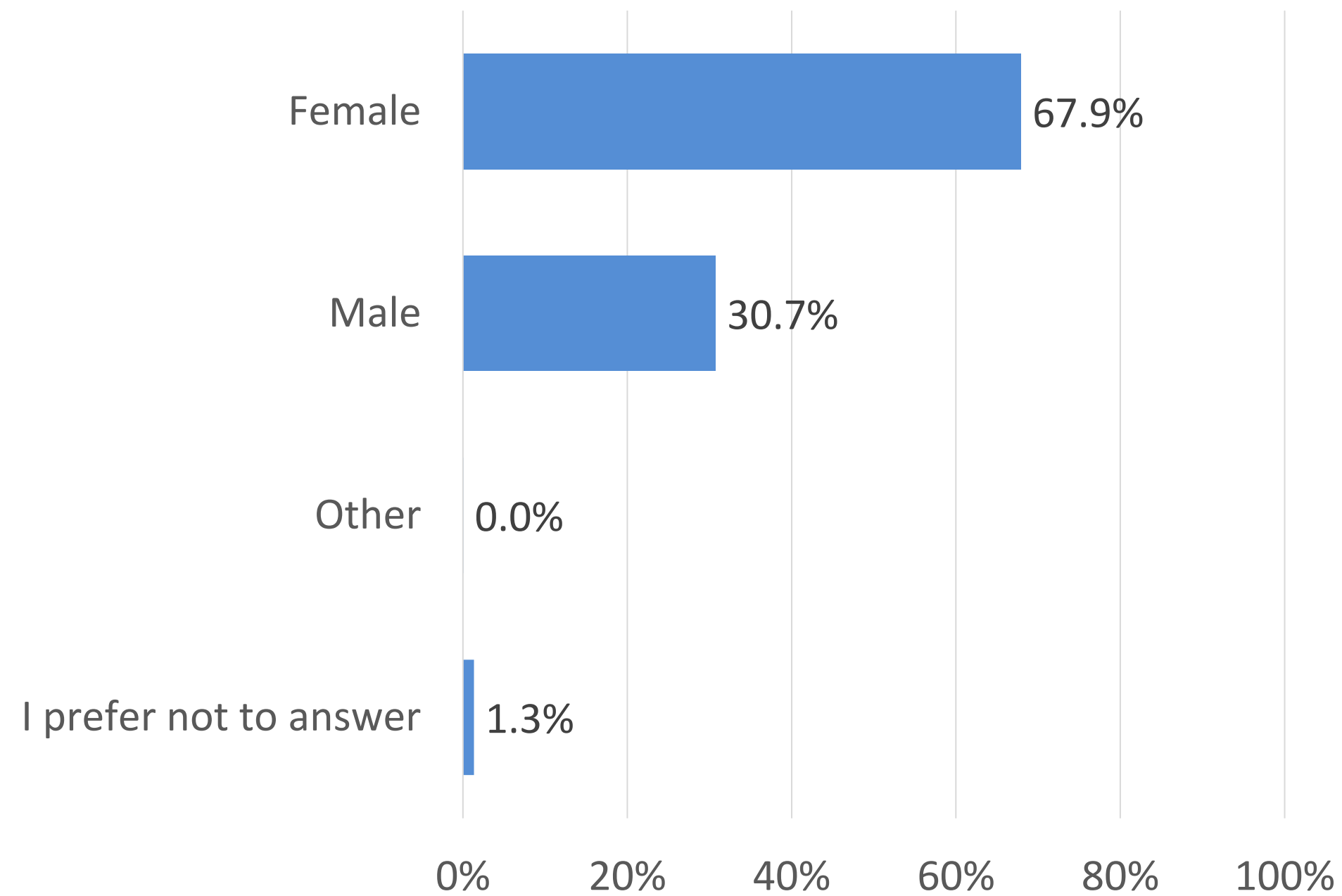
Question: Which best describes you? (Select one)
Base: All survey completes. 2,157 completed surveys.

Detail by Visitor Type

	Total	In State	Out of State	City of Wilmington	Wrightsville Beach	Carolina Beach	Kure Beach
Female	67.9%	69.4%	65.1%	65.9%	67.7%	66.3%	65.3%
Male	30.7%	29.5%	32.6%	32.3%	30.7%	32.0%	33.1%
Other	0.0%	0.1%	0.0%	0.0%	0.2%	0.0%	0.0%
I prefer not to answer	1.3%	1.0%	2.3%	1.8%	1.5%	1.7%	1.5%
Base	2,157	704	509	898	538	742	549

MARITAL STATUS

Over three quarters of survey respondents are married or in a domestic partnership (74.1%) while one-in-five are single (19.4%). In total, 15.4 percent of survey respondents have children under 18.

Figure 39: Marital Status

	Married/partnered	60.5%
	Married/partnered with children under 18	13.6%
	Single	17.6%
	Single with children under 18	1.8%
	Other	3.4%
	I prefer not to answer	3.1%

Detail by Visitor Type

	Total	In State	Out of State	City of Wilmington	Wrightsville Beach	Carolina Beach	Kure Beach
Married/partnered	60.5%	61.6%	66.6%	62.3%	63.5%	63.5%	62.0%
Married/partnered with children under 18	13.6%	13.6%	12.7%	13.9%	12.8%	14.2%	15.8%
Single	17.6%	15.2%	13.4%	15.2%	16.0%	13.1%	12.3%
Single with children under 18	1.8%	2.5%	1.4%	2.0%	1.9%	2.3%	2.4%
Other	3.4%	4.1%	1.8%	3.0%	1.8%	2.9%	3.1%
I prefer not to answer	3.1%	3.1%	4.1%	3.6%	3.9%	4.0%	4.4%
Base	2,157	704	509	898	538	742	549

Question: Which best describes your current marital status? (Select one)
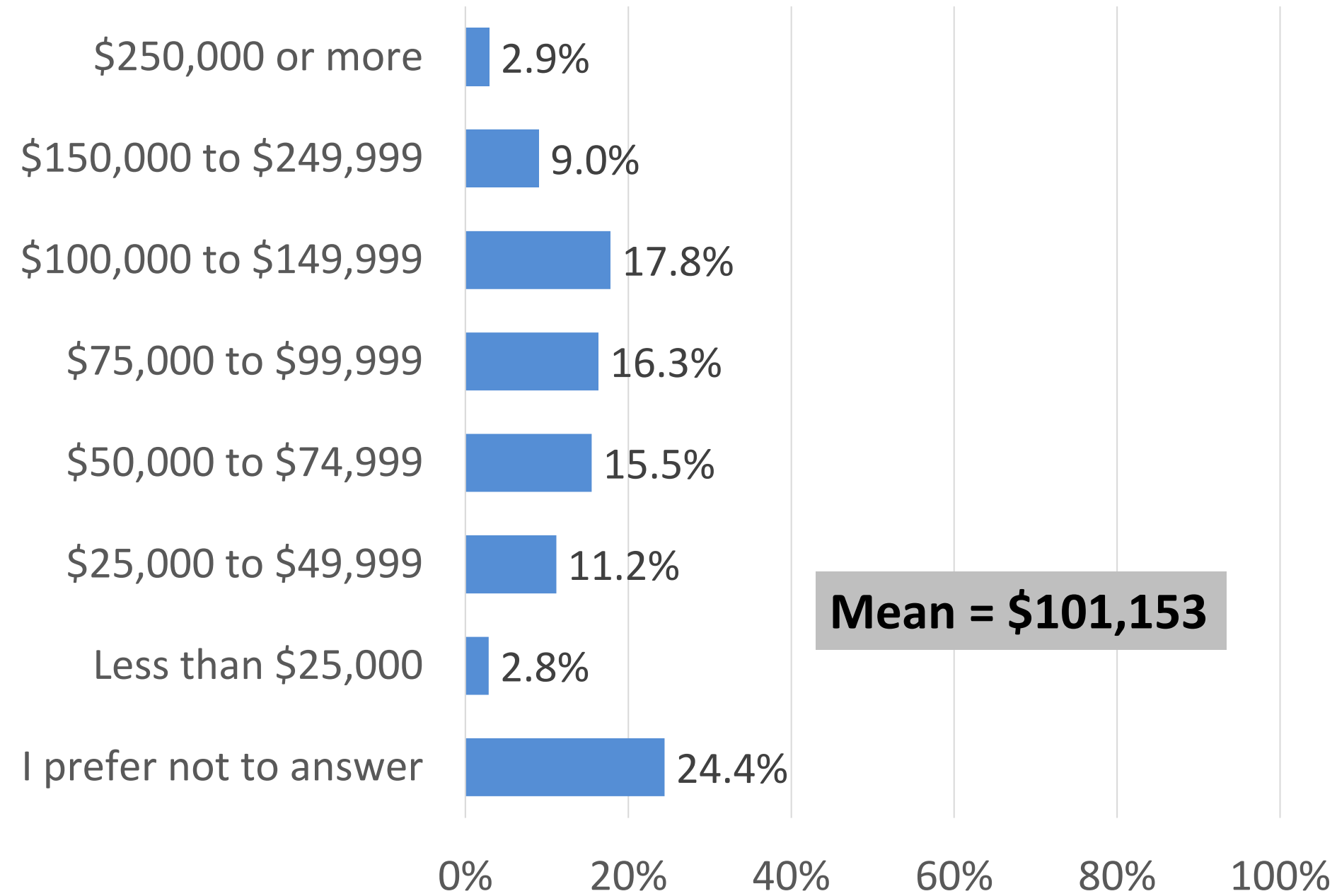Base: All survey completes. 2,157 completed surveys.

COMBINED ANNUAL HOUSEHOLD INCOME

Survey respondents are affluent, with an average household income of $101,153.
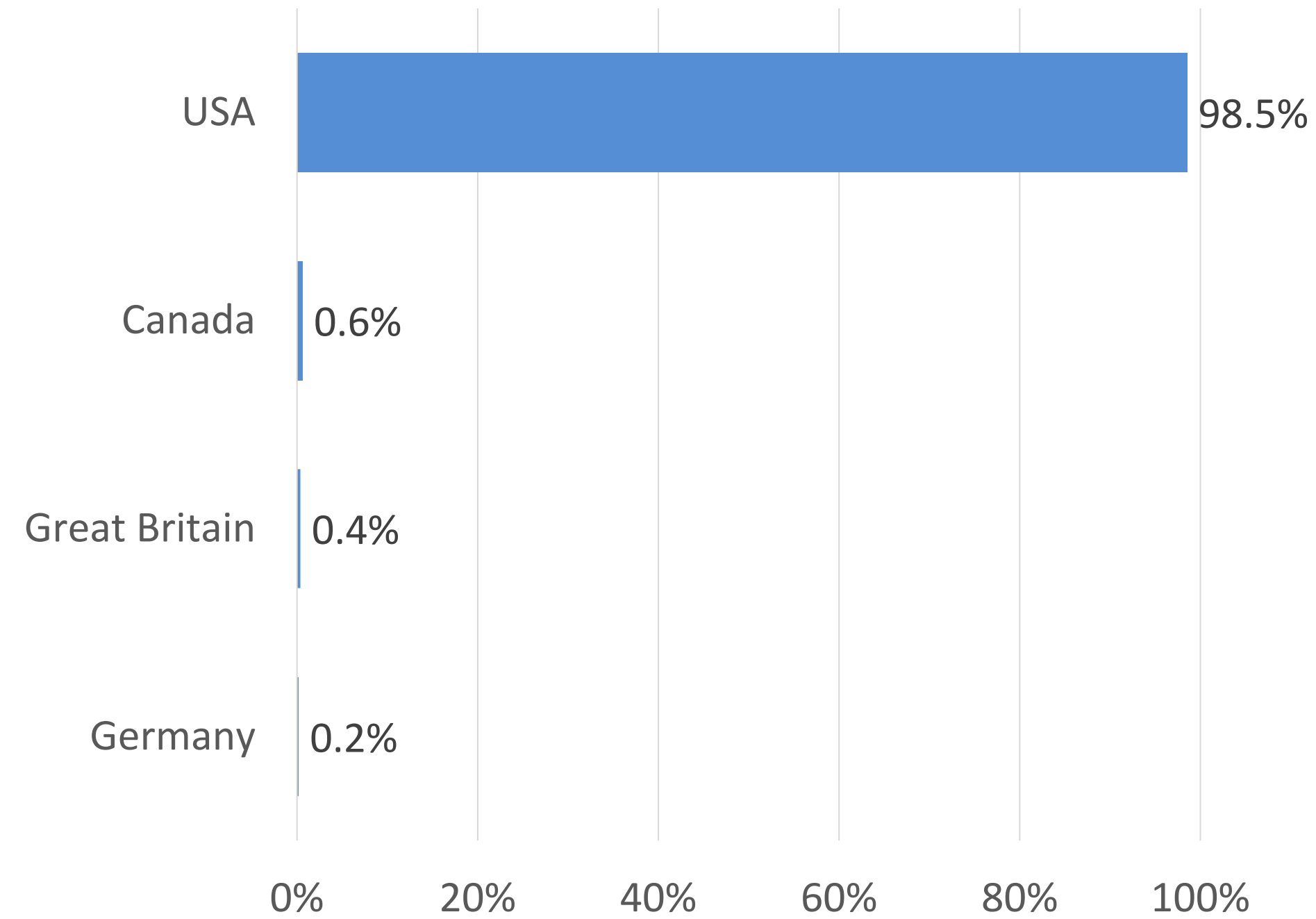
Figure 40: Combined Annual Household Income

Mean = $101,153

Detail by Visitor Type

	Total	In State	Out of State	City of Wilmington	Wrightsville Beach	Carolina Beach	Kure Beach
$250,000 or more	2.9%	2.0%	3.9%	2.6%	4.1%	2.5%	2.1%
$150,000 to $249,999	9.0%	7.9%	11.0%	11.1%	11.8%	9.5%	8.5%
$100,000 to $149,999	17.8%	19.1%	19.1%	20.5%	21.3%	19.1%	17.2%
$75,000 to $99,999	16.3%	14.7%	19.4%	17.0%	14.9%	18.8%	19.0%
$50,000 to $74,999	15.5%	17.5%	11.8%	14.0%	11.6%	15.8%	17.8%
$25,000 to $49,999	11.2%	10.4%	7.7%	8.2%	7.5%	9.9%	10.1%
Less than $25,000	2.8%	3.4%	0.6%	1.4%	1.9%	2.7%	2.9%
I prefer not to answer	24.4%	25.0%	26.5%	25.3%	27.0%	21.6%	22.4%
Mean	$101,153	$97,720	$112,956	$108,854	$115,019	$102,072	$97,939
Base	2,157	539	383	683	399	595	430

Question: Which best describes the combined annual income of all members of your household? (Select one)
Base: All survey completes. 2,157 completed surveys.

COUNTRY OF RESIDENCE

The overwhelming majority of survey respondents reside in the United States (98.5%).

Figure 41: Country of Residence

Detail by Visitor Type

	Total	In State	Out of State	City of Wilmington	Wrightsville Beach	Carolina Beach	Kure Beach
USA	98.5%	100.0%	100.0%	98.7%	98.6%	98.4%	98.6%
Canada	0.6%	0.0%	0.0%	0.8%	0.9%	1.1%	1.2%
Great Britain	0.4%	0.0%	0.0%	0.1%	0.2%	0.1%	0.0%
Germany	0.2%	0.0%	0.0%	0.1%	0.2%	0.0%	0.0%
Base	2,155	704	509	898	538	742	549

Question: In which country do you live?
Base: All respondents. 2,155 completed surveys.

STATE OF RESIDENCE

Over half of respondents who reside in the United States live within the state of North Carolina (58.6%). Approximately 5 percent or more of survey respondents reside in Ohio (6.1%), Virginia (5.0%) and Pennsylvania (4.5%).

Figure 42: State of Residence
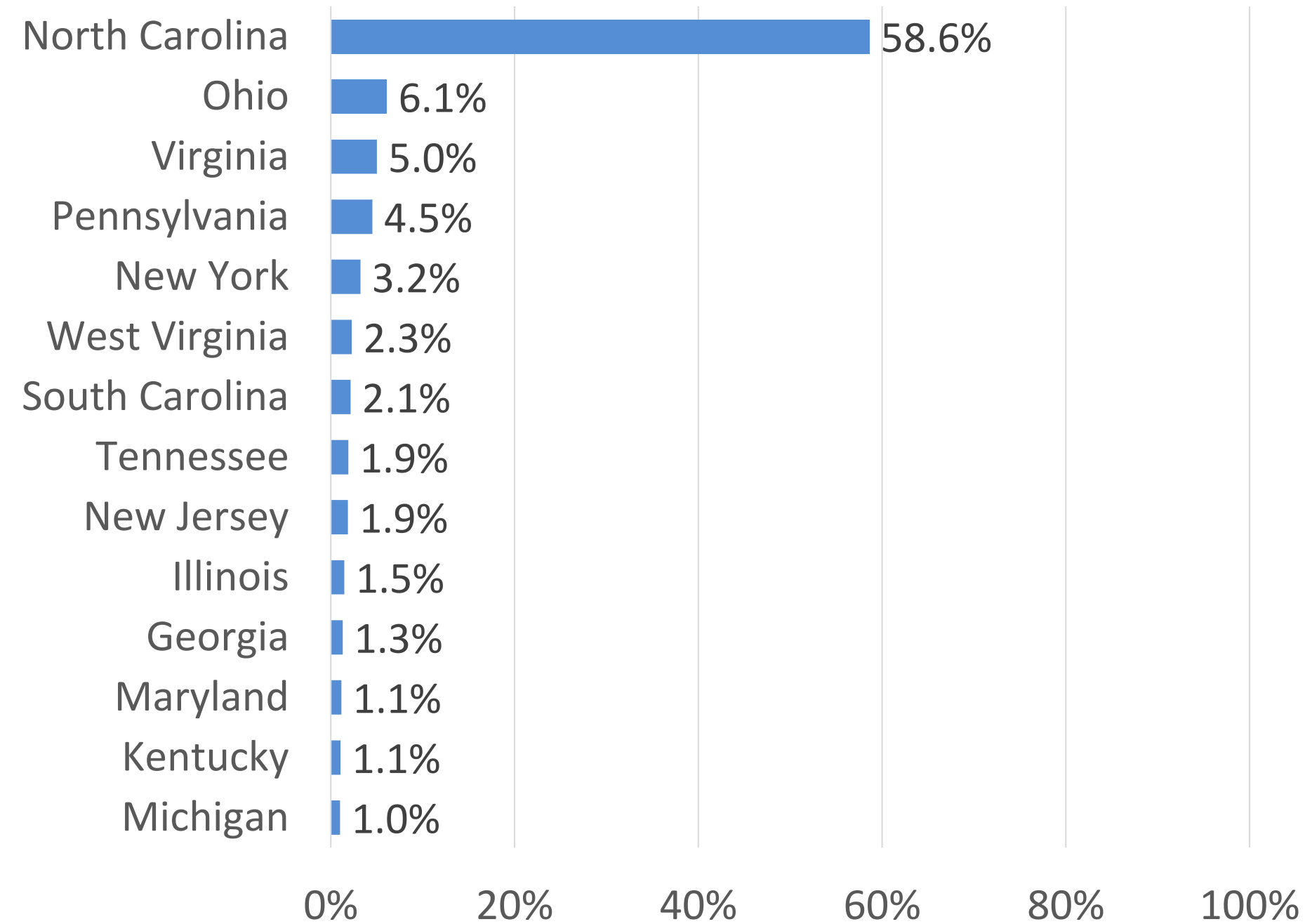
Detail by Visitor Type

|	Total	In State	Out of State	City of Wilmington	Wrightsville Beach	Carolina Beach	Kure Beach
North Carolina	58.6%	100.0%	0.0%	51.2%	53.6%	52.3%	49.6%
Ohio	6.1%	0.0%	15.2%	7.6%	6.6%	7.5%	8.7%
Virginia	5.0%	0.0%	14.6%	5.9%	3.8%	7.8%	8.2%
Pennsylvania	4.5%	0.0%	10.6%	5.1%	5.7%	5.0%	5.6%
New York	3.2%	0.0%	9.1%	4.3%	5.1%	4.4%	3.9%
West Virginia	2.3%	0.0%	6.3%	2.5%	2.2%	3.1%	4.4%
South Carolina	2.1%	0.0%	5.6%	2.7%	2.4%	1.6%	2.2%
Tennessee	1.9%	0.0%	4.8%	2.6%	1.4%	3.0%	3.3%
New Jersey	1.9%	0.0%	3.7%	2.2%	1.7%	1.1%	1.2%
Illinois	1.5%	0.0%	4.1%	2.3%	3.4%	2.2%	2.1%
Georgia	1.3%	0.0%	2.3%	0.7%	0.8%	1.2%	0.8%
Maryland	1.1%	0.0%	2.7%	1.4%	1.4%	1.5%	1.6%
Kentucky	1.1%	0.0%	1.1%	0.5%	0.7%	0.6%	0.7%
Michigan	1.0%	0.0%	2.4%	1.3%	0.8%	1.3%	1.6%
Base	2,123	704	509	887	531	730	542

Question: In which state do you live?
Base: Respondents who reside in USA. 2,123 completed surveys.

NEW HANOVER COUNTY RESIDENCE

One-third of North Carolina residents surveyed live in New Hanover

County (33.4%), while the majority live outside of New Hanover County

(66.6%).

Note: New Hanover County residents completed the psychographic and demographic questions but did not complete the full survey.

Figure 43: New Hanover County Residence

No
66.6%

Yes
33.4%
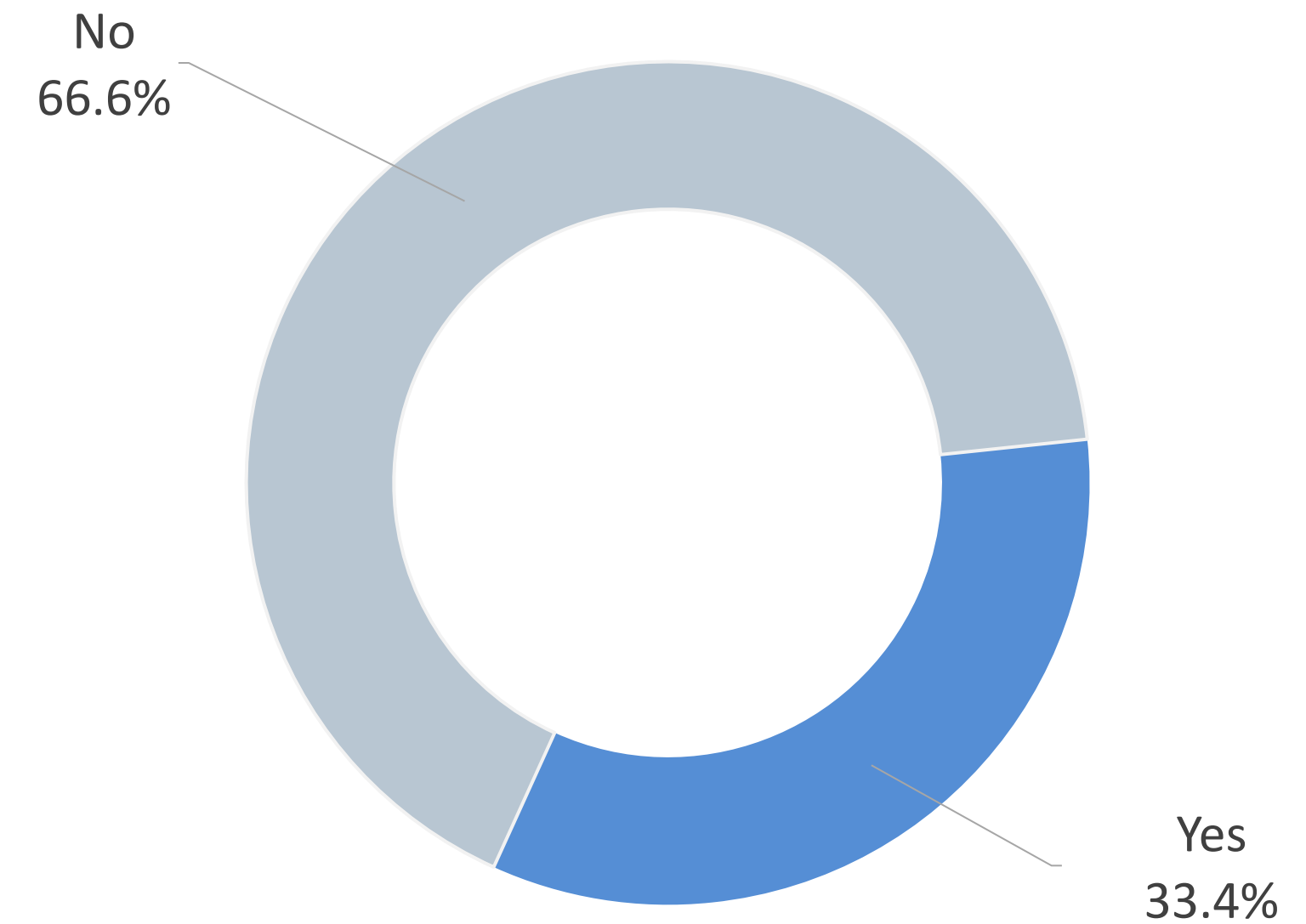
Question: Do you live in New Hanover County, NC?
Base: Respondents who reside in North Carolina. 1,253 completed responses.