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INTRODUCTION: OBJECTIVES AND METHOD

The following report summarizes the results of qualitative research conducted on behalf of the North Carolina Division of Tourism, Film, and Sports Development in collaboration with its agency of record Luquire George Andrews (LGA). The overall objective of the research was to explore vacation-related attitudes, perceptions, and behaviors of North Carolina residents regarding vacation travel in North Carolina. Specific objectives included the following:

- Gain a better understanding of participants’ general vacation planning and decision-making processes;
- Identify participants’ key selection criteria and influential factors in determining leisure travel destinations;
- Discuss participants’ use of various travel related information resources, including social media, mobile devices, and official North Carolina state and local tourism resources; and,
- Explore potential motivators for increasing leisure travel in North Carolina.

In order to accomplish the research objectives, Alan Newman Research conducted four focus groups in February of 2013 with North Carolina residents who had taken a leisure trip of at least three consecutive nights (in a paid accommodation) in the past twelve months. Two groups were conducted in Raleigh and two were held in Charlotte. Within each market, one group was held with visitors and the other with non-visitors, defined below.

- **Visitors** – North Carolina residents who had taken a leisure trip within the last twelve months within the state of North Carolina.

- **Non-visitors** – North Carolina residents who had taken a leisure trip within the last twelve months to a neighboring state (i.e., Virginia, West Virginia, South Carolina, Georgia, Tennessee, Florida) and who had not taken a leisure trip within North Carolina in the past twelve months.
Participants in both segments were required to be the person in their household most responsible (or with shared joint responsibility) for decisions regarding vacations. They represented a variety of qualifying vacation destinations and travel behaviors and companions (e.g., travel alone or with someone else, with children under 18 or not). Participants were ages 25 to 64 (skewed 35-54), and represented a mix of genders, ethnicities, incomes (most had household incomes of at least $75,000), marital status, and educational levels.

Both visitor and non-visitor groups began with a general discussion of participants’ recent vacations that qualified them for this study. Topics included where they went on their vacation, who they went with, if they considered other destinations, why they decided on that destination, and their overall satisfaction with the trip. Participants then discussed the planning process – specifically, who was involved in (and influenced) the decision-making process, factors that influenced their decision, and specific aspects of the vacation planned in advance in addition to those that were not decided until after arrival.

Each segment was then asked about their sources of information when selecting the vacation destination and planning various aspects of their trip including their use of tourism resources, travel websites, search engines and search criteria, social media, and mobile devices (e.g., GPS, smartphones). Visitor groups were asked specifically about their use of destination marketing organization websites including VisitNC.com when planning their recent in-state vacation, while non-visitor groups were also asked if they were familiar with and used these resources.

Both segments shared what North Carolina destinations/attractions they would like to visit in the future and what would motivate them to vacation more in North Carolina. Groups also explored participants’ perceptions of in-state versus out-of-state vacations, the influence of business travel on future vacations, factors that influenced “day” versus “overnight” trips, and what activities typically motivated their travel.

This report is a summary of focus group findings. It is not intended as a detailed summary of session proceedings. When reading this report, it is important to note that focus groups are a qualitative research technique. The findings are not projectable to the population of North Carolina vacation travelers as a whole.
KEY CONCLUSIONS

General Decision-Making and Planning

- **Inspiration for travel.** The majority of participants, which skewed female, said they personally proposed their travel destination. Ultimately, their spouse or travel companion(s) agreed upon the destination. The destination, amenities offered and activities planned were influenced by members of the family/group or planned according to the family’s/group’s specific interests (i.e., kid-friendly entertainment, golf, shopping). One or two participants said their recent vacation was a “family ritual.”

- **Destination consideration sets and selection criteria.** Nearly all participants said they had considered alternate destinations prior to selecting the location for their qualifying leisure trip. Typically, destinations under consideration were similar in the type of location (e.g., beaches, mountains) and/or available activities (e.g., sailing, golf, kid-friendly). When making their final destination decision, participants typically evaluated and compared destinations on a variety of factors including proximity, cost, climate, accommodations, and leisure activities.

- **Key motivations for travel.** Motivations for leisure travel varied widely across groups. However, the most consistently mentioned motivations for vacation travel included the desire to “get away” for rest and relaxation, spend quality time with family and friends, and engage in their favorite leisure activities (e.g. camping, hiking, golf, attending sporting events or festivals/concerts). Arts and cultural activities were perceived by most participants as an enhancement to their leisure trip, not as the primary motivation for travel. Although a number said they would include or had included a museum or art gallery visit as part of their itinerary during a vacation, only a few said a gallery opening or exhibit would be a primary motivation for travel.

- **In-state vs. out-of-state travel.** Participants perceived definitive differences between in-state and out-of-state travel. According to the majority of participants, in-state leisure trips were likely to be more spontaneous, shorter in duration (one to three days), involve less
planning, and less expensive than out-of-state trips. A number of participants said they did not consider most in-state leisure travel (week-long beach trips and traditional family vacations excluded) to be a true vacation, but rather a “getaway.”

- **Day trips.** The majority of participants take multiple in-state “day trips” for pleasure throughout the year. Most of these participants said that day trip destinations were relatively close in proximity – no more than a two to four hour drive (one way). Reasons for taking day trips rather than overnight trips to the intended destination included reduced cost, limited availability of leisure time/family schedules, lack of pet care, and the relatively short duration of the intended activity. Day trips tended to be more spontaneous than overnight trips, involving anywhere from a few hours to a couple of weeks of planning.

- **Sources of information.** Across markets, the primary source of information was the internet. The majority of participants began their vacation planning and research with a Google search, and then accessed various web sites from the list of search results. Most said they did not rely exclusively on a single information source or a single web site, they perceived that it was important to compare information across multiple sites. Consumer reviews, as provided through various web sites, were seen as particularly credible and helpful.

  - **Destination ideas and selection.** Recommendations from friends and family, promotions, travel websites, and social media inspired participants’ vacations. When participants had a general idea of their vacation destination, they used similar information sources to plan and schedule their accommodations and activities. Specific sources included Google results, travel websites for consumer reviews and ratings (e.g., TripAdvisor, Kayak), official tourism resources, promotional travel websites (e.g., Groupon, Travelzoo), and in a few cases, travel membership programs (i.e., timeshares), the Travel Channel and YouTube.

  - **Identification and planning of activities.** Participants relied on the internet to both provide information regarding available activities and attractions at their destination and for reviews on activities they were considering. After arrival at their destination,
many participants additionally relied on recommendations from local residents, hotel staff, and print materials (e.g., travel brochures, entertainment and coupon publications) for leisure activity ideas.

➢ **Use of social media and consumer reviews.** Social media is an important source of information and is used at all stages of the vacation planning process. A few participants said they used Facebook to ask friends and family for recommendations (or information) on vacation destinations and activities. Many more said they utilized sites like TripAdvisor and Yelp for consumer reviews and ratings of destinations, restaurants, and activities. In addition, they regularly searched or received notifications for deal-of-the-day promotions on sites like Groupon and LivingSocial to search for promotional travel packages.

➢ **Use of mobile devices.** During actual travel, mobile devices (e.g., smartphones, GPS devices) were an integral planning and information gathering tool for most participants. Internet browsers on smartphones were used to search for local accommodations, restaurants, and activities. Participants also frequently utilized various travel applications (e.g., Urbanspoon, Yelp, Kayak, TripAdvisor) to locate and research local accommodations, restaurants, and activities. In addition, some used their smartphone’s built-in GPS for directions, and in some cases, the ability to search for area restaurants and activities.

➢ **Travel promotions.** Online travel promotions are an effective marketing tool. Specifically, many participants said they could be motivated (and had been motivated in the past) to engage in leisure travel based on the availability of promotional “deals” they found online. They said these trips tended to be shorter in duration (one to three nights), were regional, and typically occurred over the weekend. The majority of these promotional travel deals were found through “deal-of-the-day” sites like Groupon and LivingSocial, although some were on travel sites like Travelzoo and Travelocity.
North Carolina

- **Appeal of North Carolina.** North Carolina’s beaches are a big draw. The majority of visitors had vacationed at a North Carolina beach for their qualifying vacation. Furthermore, when asked to name North Carolina vacation destinations that they would like to visit in the future, beaches (and particularly the Outer Banks) topped the list. Other destinations frequently mentioned included the mountains (skiing, camping, hiking), historic sites (Biltmore, Raleigh), metropolitan areas (Charlotte, Raleigh for shopping and nightlife), and more generally scenic destinations for rest and relaxation (The Grove Park Inn).

- **Barriers to consideration and future travel.** North Carolina destinations were not typically in non-visitors’ consideration sets. Some non-visitors mentioned lack of nightlife, lack of kid friendly resorts and activities, and a colder climate relative to more southern locations as reasons for failing to consider in-state destinations. In addition, there was a sense that North Carolina destinations were too familiar (not new and different) and/or that in-state travel does not constitute a “true vacation.” Furthermore, cost concerns and time constraints were also mentioned as barriers to increased in-state (as well as out-of-state) travel.

- **VisitNC.com.** Awareness and usage of the VisitNC.com web site was fairly high and participants who had used it perceived the information provided as credible and unbiased.
  
  - Nearly half of participants across all groups were aware of VisitNC.com and many had used the site, or North Carolina Visitors Bureaus websites, during their initial vacation planning and research.
  
  - Participants generally came across the link for the site while conducting a Google search and clicked on it.
  
  - VisitNC.com (and official tourism websites in general) was generally used as a “starting point” during the initial planning process to provide information on
accommodations, activities/attractions, and restaurants at their intended destination. Other websites and sources of information were then used to both compare and expand on information provided through VisitNC.com.

- **NC partner advertising.** Awareness of advertising from in-state tourism partners was low across groups. On the other hand, participants were more aware of out-of-state tourism advertising campaigns (e.g., California, Virginia, Florida, West Virginia, Michigan, Caribbean all-inclusives, “Visit the Gulf Coast,” Alabama’s Robert Trent Jones Golf Trail).

**Recommendations**

Based on actual comments from participants, as well as interpretation of findings, suggestions for motivating travel within North Carolina are as follows:

- **Fine tune messaging as needed.**
  
  - Address reasons/motivators for vacations and the perception in-state travel is not a “real vacation.” Communicate North Carolina destinations and attractions can satisfy consumers’ primary objectives and appetite for distinctive, memorable and “big” vacation experiences – rest/relaxation, quality family time, and/or engaging in specific activities (golf, beaches, outdoor activities, entertainment and nightlife). Those same attributes strengthen North Carolina’s appeal for more spontaneous getaway travel too.

  - Address concerns regarding (over) familiarity with North Carolina and position it as offering some surprises and attractions that residents have yet to visit/discover.

  - Address cost concerns and communicate that in-state travel offers a lot of value for the money, and can be a good deal, relative to other vacation options.
Emphasize North Carolina offers child-friendly resorts and activities, nightlife, proximity of key attractions (to Charlotte).

Marketers should emphasize efforts to ensure their web link appears at the top of organic internet search returns.

- **Emphasize value and affordability.** Make participants feel like they are getting a “good deal.” Offer and communicate cost savings and added value opportunities through travel packages, discounts/coupons (offered through Groupon, travel web sites, social media, etc.), in-state resident savings programs, etc.

- **Recognize the value, importance, and motivational impact of Google, social media, deal-of-the-day web sites, smartphone apps, and consumer reviews/ratings,** and leverage these resources whenever possible.

- **Recognize the value, importance, and influence of traditional sources of communication and education.** Employ hospitality and customer service training. Reach out to and educate allies such as hotel staff, restaurateurs, cab drivers, etc. about attractions and places to visit. Distribute promotional materials (brochures, attraction and coupon publications) in hotels, bed and breakfasts, rental properties and other public venue lobbies.

- **Offer packages that simulate “all-inclusive” vacation packages.** Recognize that all-inclusive resorts are appealing because they are convenient (i.e., they satisfy consumers’ needs for food, lodging, and recreational activities in a single location at a fixed price) and offer bundled package deals including accommodations and amenities for a fixed, pre-determined price.

- **Attempt to convert day trips to overnight trips.** Through package deals and/or appealing discounts (particularly on accommodations), attempt to convert day trips to one-night overnight trips.
RECENT VACATION

The groups began with a brief discussion regarding their recent qualifying leisure trip. Participants were asked where they went on their trip, who was involved in choosing the destination, and if there were alternate destinations considered. They were then asked about their overall satisfaction with the trip.

Recent Vacation

North Carolina destinations. Participants in the visitor groups visited a variety of destinations throughout North Carolina. The majority of visitors had visited destinations on the North Carolina coast, including Carolina Beach, Holden Beach, Wrightsville Beach, and New Bern. A few participants said their qualifying trip was to Blowing Rock.

Neighboring state destinations. Participants in the non-visitor groups similarly visited a variety of vacation destinations. Nearly all of the destinations were evenly distributed across three states/regions – Florida, South Carolina, and Virginia/District of Columbia.

- **Florida.** Specific locations in Florida mentioned by participants included Key Largo, Tampa, St. Pete Beach, and Orlando (Disney World).

- **South Carolina.** Participants who said they had traveled to South Carolina visited coastal destinations, including Myrtle Beach, Hilton Head, and Charleston.

- **Virginia/District of Columbia.** Two participants in the non-visitor groups said they had visited the Northern Virginia and Washington D.C. metro area. One participant vacationed in Williamsburg, VA and one traveled to Charlottesville, VA.

Decision-makers. The majority of participants said they proposed the vacation destination; however, ultimately it was a joint decision with their spouse or travel companion(s). For the most part, destination, amenities offered and activities planned were influenced by members of their family or planned according to specific interests (i.e., kid-friendly entertainment, golf,
shopping) of everyone. One or two participants said their recent vacation was a “family ritual.” In this case, the destination was “a given” and there was no actual decision to be made.

**Travel party.** Across groups, the majority of participants said their qualifying leisure trip was taken with immediate family members (e.g., spouse, children) and one or two said they met extended family (e.g., parents, brother’s family) at the destination. Some participants said their leisure trip was taken with a friend or group of friends, including a golf trip to Myrtle Beach, a concert in Charlottesville, and weekend trips to Washington, D.C. and Charlotte.

**Vacation Destinations Considered**

**Consideration set.** Most participants considered more than one vacation destination before ultimately selecting their qualifying destination.

- Locations that were considered, but ultimately not selected, tended to be very similar in nature to the destination participants chose. For example, one participant who ultimately chose to vacation at Carolina Beach said, “We were looking for a coastal destination. We looked at OBX and Wrightsville Beach as well.” Another said, “We were looking for a lake property – could have chosen Georgia or North Carolina, but we chose South Carolina.”

- Some participants said they considered numerous destinations and compared them based on several important factors (e.g., proximity, cost, climate, accommodations, leisure activities), selecting in the end what they considered to be their best overall value. One participant stated, “We have a family of four, so we’re budget conscious. We think of where we can go and not have to fly. Think of anywhere that’s warm, affordable, and somewhat ‘beachy.’”

- A few participants said they did not consider any alternate destinations because they either traditionally vacationed in that same location or purchased some type of promotional package for a specific area. As one participant said, “We found a deal and chose because of it.”
Listed below are representative alternate destinations mentioned by participants:

- **Visitors** – Asheville, Outer Banks, Emerald Isle, Boone, Florida, Myrtle Beach, Virginia Beach, Wrightsville Beach, Kiawah Island, Greensboro

- **Non-visitors** – Phoenix, “other places in Florida,” “somewhere in Arizona for golf,” Georgia, North Carolina, Disney, Kentucky, Virginia

**Non-visitors’ reasons for not considering North Carolina.** *Non-visitor* groups were asked if they had considered any destinations in North Carolina. Only one or two participants in the Charlotte market said they considered locations in North Carolina and no one in the Raleigh group said they had considered in-state destinations. Reasons given for not considering North Carolina destinations included a desire to experience something new or different, lack of nightlife, colder climate, lack of kid-friendly resorts and activities; and, “They don’t have Disney.”

**Satisfaction with Vacation**

The majority of participants in both the *visitor* and *non-visitor* groups were satisfied with their recent vacation.

**Reasons for satisfaction.** Participants listed a variety of factors that influenced their satisfaction level with their recent vacation.

- **Accommodations.** Satisfaction with their accommodations (e.g., rental house, hotel) was a primary factor in participants’ overall satisfaction with their vacation. Some were pleased with the actual facilities; as one participant commented, “They had just upgraded the facility – brand new stuff.” Another noted, “The cabin was spacious – just like being at home.” Other participants said the hotel staff was also a factor, with one participant saying, “We loved the people at the hotel” and another stating, “The accommodations were nice, so were its restaurants, and the people speak with you – very friendly.”
However, it should be noted that a few participants were not pleased with their accommodations, but were still satisfied with their trip overall. One participant commented, “I had a horrible experience with the hotel in Charlottesville, but the town was nice and very interesting.”

- **Travel companions.** A few participants said they enjoyed their vacation simply because they were enjoying time spent in the company of friends and family. As one participant said, “Just the fact we had our family by the ocean.”

- **Activities.** A number of participants commented the available activities on their vacation made their trip satisfactory. One participant who traveled to Charlotte said, “We love to shop, it was great” and another commented, “The scenery and museums were great.” One participant who traveled to Myrtle Beach for golf said he was pleased with the “quality of the courses.”

- **Dining.** The availability of affordable and quality dining options contributed positively to a few participants’ satisfaction.

- **Lack of crowds.** A few participants said they enjoyed the privacy and quiet during their vacation. One participant said, “We like the Outer Banks in the off-season” and the other commented, “We always try to go [somewhere] in the off-season – it’s empty.”

- **Proximity.** Two or three participants in the Raleigh visitor group said their vacation destination was located within reasonable proximity to their home. The destination offered all the amenities appealing in a vacation about two hours from home.

**Likelihood of a return trip.** The majority of participants said they would consider returning to their vacation destination for a future trip and a few said “they would definitely go back.” Participants who were unlikely to consider a repeat vacation to the same destination either preferred to visit different destinations on each vacation or said that the destination did not meet their expectations. As one participant said, “I liked it, but would rather go somewhere else next
time.” Another participant who had traveled to South Carolina said, “Myrtle Beach was okay, but I wasn’t completely satisfied. It didn’t measure up to me for a beach vacation.”
VACATION PLANNING AND DECISION-MAKING PROCESS

Following the discussion on participants’ recent vacations, they discussed their planning and decision-making processes. Specifically, participants were probed as to their motivations for travel, their sources of information, and their use and perceptions of destination marketing organization websites and marketing materials.

Planning Process

Motivations for travel. Motivations for leisure travel varied. Participants’ motivations for choosing a particular destination are summarized below.

- **Relaxation/Getting away.** A number of participants said rest and relaxation were the sole motivation for much of their leisure travel. One participant commented, “[I] like to relax as much as possible. Get away from the normal stuff.” Another participant said, “We’re looking for as little activity as possible.”

- **Time with family/friends.** Spending time with family and friends was a big motivation for leisure travel. For some, these family vacations were a tradition or ritual and they returned to the same destination year after year. In addition, one or two participants said these trips brought together family or friends from all across the country. One participant commented, “Being able to get together because we’re spread all over” is a big motivation. For example, participants said, “[We] like seeing family and friends – doing things together” and “We like spending time with grandkids.”

- **Outdoor activities.** Various types of outdoor activities (e.g., kayaking, zip-lining, camping, hiking, scuba diving, fishing, sailing) were mentioned frequently as the motivation for many participants’ leisure travel. Participants’ comments included, “I prefer nature or hiking – outdoor stuff. Natural stuff, where I don’t have to pay – do stuff on my own” and “Asheville has the best zip-lining we’ve ever done.”
> **Sporting events.** Many participants said sporting events were a motivation for travel. Specific types of sports-related travel mentioned by participants included NASCAR races, baseball and football games (Carolina Panthers), golf tournaments, college sports and youth sporting events. While most sports-related travel occurred in North Carolina, a couple of participants said they would travel across the country. One participant commented, “We like to go to baseball at historic venues” and another said, “We promised our son we would take him to every football stadium. We base vacations on that.”

> **Arts/Culture.** A few participants said arts and culture were a motivation for travel. One participant traveled to Florida to see a Salvador Dali exhibit and a couple of participants had traveled to Washington, D.C. to tour museums (e.g., Smithsonian). For most, arts and culture were an enhancement to their vacation rather than a primary motivator. One participant said they always tried to “add culture” to their trips, commenting, “The arts and culture are part of my trips. It’s educational.”

> **Concerts, festivals.** A few participants said they were motivated to travel for music festivals and concerts. One participant commented, “We plan weekends around concerts in Charlotte.” Additionally, a few others said they travelled to attend other types of festivals including art and seafood festivals.

> **Kid-friendly activities.** Some participants with children said that kid-friendly activities were a big motivation for travel. Disney World and zoos were specifically mentioned by a few participants and one participant said, “We look for kid-friendly activities with good prices.”

> **Scenic landscape.** A number said that simply being surrounded by the calming atmosphere of scenic beaches, lakes and mountains was their motivation for travel.

> **Historic.** Many participants said that historic locations and activities were a motivation for travel. One participant commented, “We like historic sites, antiquing as well” and another said, “Experiencing different cultures and history” would motivate travel.
Diversity. A few participants said they enjoyed traveling to new places throughout the state or country to experience regional differences in food, culture, and history.

Golf. One or two participants said golf was a motivation for leisure travel. Golfing destinations mentioned by participants included Myrtle Beach, Florida, and Arizona.

Nightlife. Two participants’ qualifying leisure trips were to urban centers (Charlotte and Washington D.C.) specifically for their nightlife.

Weather. One or two participants commented that nice weather would occasionally motivate a spontaneous trip to take advantage of outdoor activities.

Proximity of activities to accommodations. In general, participants said the proximity of leisure activities to their vacation accommodations was important. Most participants said that ten to twenty minutes (and one hour at most) was a reasonable distance to travel. One participant commented, “The length of travel I’m willing to go depends on the length of stay.” One or two participants who ventured outside of their primary vacation location for activities said they were looking for things “that they can’t do at home.”

In-state vs. out-of-state. In general, both visitor and non-visitor participants said they perceived definitive differences between in-state and out-of-state travel.

Key differences. Most participants characterized in-state travel as shorter in duration (one to three nights), closer in proximity, more affordable, and more spontaneous. One participant commented, “In-state [travel] is more of a one or two day [trip]. Week long [trips] are out of state.”

Perceptions of “vacation.” Not only did participants mention calculable differences – time, distance, and cost – when considering in-state versus out-of-state travel, they also shared emotional differences of what entails a true vacation. Some participants said they did not consider in-state travel a vacation, but merely a “getaway” or “trip.” As one
participant described, “We go on long weekend trips in-state multiple times a year. But we do a long vacation every year or two – that’s out-of-state.”

- **Amount of planning.** The majority of participants said that out-of-state travel involved more planning and research than in-state travel. As one participant said, “A lot more research goes into out-of-state [travel] – accommodations, locations, why I’m choosing it.”

- **Degree of spontaneity.** The majority of participants said that in-state travel was much more likely to be spontaneous than out-of-state travel. One participant said, “In-state [trips] are kind of improvised – ‘why don’t I go to the beach this weekend?’” However, it should be noted that participants’ definitions of a “spontaneous” trip varied widely, from a few hours to more than two weeks of planning.

Participants said they engaged in spontaneous travel for a variety of reasons, including “if the weather was nice,” “if we’ve been really busy and want to get away,” “if we have an open spot on the calendar,” and “if work is getting to you.”

**Day trips.** Nearly all participants in both segments take day trips for leisure interests/activities. They said day trip destinations were almost always in-state and were within reasonable driving distance. When asked to define “reasonable,” many estimated they would be willing to drive as far as two to four hours (one-way) for a day trip destination. One participant commented, “I think of how long I’m going to be there [destination] versus how long I have to drive.”

When probed as to what influenced the decision between taking a day trip versus an overnight trip, participants cited cost, distance, available free time, duration of intended activity, and family schedules (or pet care) as influential factors. It should also be noted that in accordance with participants’ perceptions of in-state travel, day trips were much more likely to be spontaneous than overnight trips.

**Influence of business travel.** Some participants in each group said that business travel had played a role, to some extent, in influencing future leisure travel. Specifically:
Two participants said their vacations had been directly influenced by previous business travel and gave specific examples. One participant said, “I traveled to Europe for pharmaceuticals [business]. And then I went back with my family.” Another participant commented, “I used to travel to New York City for business and fell in love with the city. While I was there, I checked out restaurants and shows I might want to see when I came back.”

A few participants said they did not engage in any serious research while traveling for business, but would simply “pick up a pamphlet or something.” One participant said, “When I’m sent somewhere…I’m just really eyeballing things. Not really any research.” Another participant said, “You’re stuck in a hotel and you get to look through all of their literature.”

Others said they had extended a business trip and turned it into a vacation. One participant said, “We went to Washington D.C. for an anniversary – my husband had to go for work and we extended it.”

**Sources of Information**

Participants’ preferred sources of information were contingent on what aspect (e.g., location, activities) of their vacation they were planning and what stage of the planning process they were in. However, nearly everyone said they used the internet in some form, from initial planning stages to information searches during their trip.

Participants generally used multiple sources of information and a variety of websites; they perceived that it was important to verify information across multiple sources rather than relying extensively on a single source.

Participants discussed their sources of information for three specific stages of trip planning: 1) inspiration/selecting a vacation destination, 2) identifying activities and attractions prior to vacation, and 3) information needs while actually on vacation.
Selecting a vacation destination. Participants’ responses were mixed with regard to what sources of information they used to initially select a vacation destination, as well as how they sought additional information about the location after its selection. In general, the majority of participants said they typically had a fairly good idea of where they would like to travel, in terms of the type of location (e.g., beach, mountains) and/or the geographic region (e.g., Florida). They used various information sources to further define and research the exact location (i.e., what city/town/accommodations) within their pre-determined parameters. For example, one participant said, “Choosing the destination is different from choosing hotels” and another commented, “I usually know where I want to go, but then I look for reviews.”

Information sources most consistently mentioned by participants during this initial stage are as follows:

- **Word of mouth.** A number of participants seek recommendations of travel destinations from family and friends. This was usually done either in-person or through social media (i.e., Facebook). One participant commented, “I got a referral from a coworker” and another said, “I’ll post on Facebook – ask for recommendations.”

- **Google.** Overwhelmingly, participants’ most consistently utilized source of information for vacation planning were Google searches. Most participants began their initial research with Google searches and nearly all participants said they used them at some point during the planning process. However, the choice of search terms and the method of selecting specific links from the list of results varied across participants.

  - **Search terms.** Specific Google search terms varied widely among participants and from one type of information search to another. In general, participants said that they simply entered in their vacation destination and added phrases like “things to do,” “deals” or “coupons,” “top hotels,” or “best restaurants.”

  - **Selecting link.** Participants’ methods for choosing specific links to click on from the list of search results also varied. However, participants were generally wary of the paid ads.
Some simply clicked a number of links until they were satisfied with the information. As one participant said, “I check them all until I find what I want. There may be something that jumps out at me.” Others focused on the “top links” (the first three or four links) on the first page of search results.

For other participants, name recognition was important when deciding which link to choose. Participants commented, “Brand names – because they’re credible” and “It needs to be somewhat familiar.”

- **Social media/travel websites.** Overall, travel websites (e.g., TripAdvisor, Kayak, Travelocity, Expedia, Priceline, Yelp, Hotwire, VRBO) were the most frequently utilized internet resource after Google. TripAdvisor, in particular, was used by most participants for vacation planning and research.

  Participants either visited these sites directly or clicked on the link when it came up during a search. According to participants, the most helpful features of these sites were the extensive collections of consumer reviews and ratings regarding various aspects of a location (e.g., the location itself, accommodations, restaurants, activities). In addition, and similar to Google, these travel sites were used as both a starting point and as a portal for direct access to more specific information/websites (through direct links to additional sites). One participant commented, “A broad search is done on TripAdvisor and Priceline – then you can go to the specific hotels and stuff.”

- **Official tourism resources.** Typically, official (e.g., state or city) tourism resources were utilized only after a destination had been selected. Most participants who used these resources found them credible and unbiased. Official tourism websites were the primary source of information, but one or two participants said they contacted the tourism boards directly. One participant said, “If it’s somewhere further away, I might call their tourism board and get info from them. They’re reliable.”

- **Promotional websites.** A number of participants used travel-related promotional websites like Groupon and Travelzoo. One participant said, “I used Travelzoo – they
send you the top twenty weekly deals.” These sites were not only used to purchase travel packages, but also to generate ideas of where to travel. Regarding Groupon, one participant commented, “I haven’t necessarily gotten one, but it gives you ideas.”

A number of participants said they routinely searched these sites for travel deals, not just when they were planning to vacation. As one participant said, “I was looking on Groupon and found something. I’m usually looking for options, looking for deals” and another commented, “I look at those sites every day, subscribe to a bunch of them.” Participants usually verified these sites’ information with other travel sites like TripAdvisor.

In contrast, one or two participants said they were unsure of these websites – “I’m a little hesitant about Groupon because I’m not sure of the service.”

- **Timeshares and travel programs.** A couple of participants said they were owners in timeshare programs and their first source, typically, for information about potential vacation destinations was the catalogs of their timeshare exchange companies, RCI and Interval International.

One or two participants said they used AAA as a source of information when researching potential vacation destinations. One participant said, “I can walk into an AAA store and they can help me out.” One other participant said he sometimes uses a government website, militarytravel.gov, to search for travel deals.

- **Travel Channel and YouTube.** A few participants watch travel related television and said that helped generate ideas of appealing vacation destinations. Similarly, one or two participants said they looked for travel videos on YouTube, with one stating, “I type in something about the destination, there are films and videos on there for everything.”

**Identification of Activities/Attractions.** Nearly all participants’ starting point for identifying and planning specific vacation activities was an internet search. Google and travel websites were once again the most popular resources among participants during the at-home planning stage.
However, after arriving at a destination, many participants relied on local knowledge (i.e., word of mouth) and print communications (i.e., brochures) for much of their activity planning.

- **Google.** Most participants said they simply Googled “things to do in a certain area” prior to arriving at their destination. They also used Google on their smartphones once they arrived.

- **Social media/travel websites.** Travel websites (e.g., TripAdvisor, Yelp, Kayak) were heavily relied upon by participants for information about local activities. The consumer reviews and ratings provided on these sites were, again, some of the more trusted sources of information for activity planning. For example, when traveling to Disney World, one participant commented, “I have a favorite website for Disney World – Mouse Ears – it has reviews. I’ll have it printed out ahead of time and format plans from there.”

- **Word of mouth.** A number of participants said they sought local recommendations for activities and entertainment from staff at hotels, visitor centers, and local residents. As illustration, one participant commented, “I wait [until I get there] to ask locals a lot.”

- **Official tourism resources.** Many participants utilized official tourism websites and travel/visitor centers when searching for information on specific activities and attractions at their vacation destination. A number of participants said these official tourism resources were a good source of credible information and current entertainment/activity specials or discounts in the area.

- **Information at accommodations.** Many participants said they collected literature provided by their vacation accommodations (e.g., hotel, rental home) to generate ideas of activities/entertainment to do in the area. Though usually in the form of hotel brochures, one participant said some rental homes also have helpful information, “When you look at [rental] homes, the owners have [listed] different things to do [in the area].”
Information gathering during vacation. Participants listed a variety of information sources they utilized while on vacation. The most popular sources of information were word-of-mouth recommendations and their mobile device (e.g., smartphone, GPS device).

- **Word of mouth.** The majority of participants said they sought information from “locals” during their trip. Some participants said they ask hotel staff for recommendations of the best local restaurants or things to do in the area (e.g., “we always go to the concierge desk”). A few participants said they also asked local residents they came across for their recommendations.

- **Mobile devices.** Most participants used mobile devices, either GPS or smartphones, as a source of information during their vacation. GPS devices were typically used for directions, but some devices were also capable of providing additional information of local restaurants or activities in the area.

  Smartphones were similarly used for directions through their built-in GPS. Participants also utilized their smartphone’s internet browser (e.g., Google, Safari) and travel applications (e.g., Urbanspoon, TripAdvisor, Siri) to search for information related to local activities/restaurants. One participant commented, “Sometimes we’ll use Urban Spoon [smartphone app] for every meal.” Another said, “I travel a lot, so I use Siri – easy and quick. I look for restaurants and activities like kayaking.”

- **Information at accommodations.** Again, many participants picked up printed brochures or advertisements for restaurants and activities in the local area at their accommodations (including hotels, bed and breakfasts, and in a few cases, rental properties).

- **Travel centers.** A few participants said they visited local tourism centers (i.e., visitor or travel centers) for information about activities and restaurants in the area. Participants perceived these travel centers as a good place to find discounts and coupons. One participant commented, “We always stop there. They have brochures for food and activities.”
Official Tourism Resources (state and local destination marketing organizations)

In general, participants were familiar with official tourism resources, either online or brick-and-mortar locations (i.e., welcome centers), and utilized them during various stages of their vacation planning process.

Online. When asked if they had visited an official (e.g., state or city) tourism website, several said they had done so in the past. This research was typically done prior to their vacation.

- **Accessed through search results.** No one recalled accessing an official tourism site by typing in a web address; instead, they clicked on its link when it came up as a search result (“It’s not the first place I go – but if it pops up on Google I will”).

- **A “starting point.”** As previously mentioned, official tourism sites were used primarily as a “starting point” for planning/research and participants sought to verify the information provided using other travel sites like TripAdvisor and Yelp, usually through consumer reviews. For example, one participant commented, “You get a broad overview. It gives you a preliminary idea. Then if the place looks good, I will get more information from other sites.”

- **Credibility.** The majority of participants who had visited official tourism sites said they found them credible, unbiased, and would visit them again. One participant commented, “I would click that over others, but would still need more research.” However, when probed, participant responses were mixed with regard to whether or not they found official travel sites more or less credible than other, “unofficial” travel websites.

In contrast, a few participants said they did not use official tourism websites. These participants perceived them as less credible than other sites. For example, “I don’t like city or state sites – I feel that whatever is advertised is paid for” and “seems less legit because they may be pushing you to places, instead of reviews from travelers.”
VisitNC.com. Nearly half of participants, across all groups, said they were aware of VisitNC.com and most of these participants had used it in the past. Similar to other official tourism sites, participants said they initially found VisitNC.com during a Google search and that it was primarily used as a starting point during initial vacation planning/research.

Most participants who had visited the site used it to find information on local, typically, outdoor activities. Others searched VisitNC.com for information on area accommodations (e.g. search for pet-friendly hotels), festivals and restaurants.

Welcome/Visitor Centers. State and local welcome/visitor centers were not used as frequently as official tourism websites for vacation planning, but were still utilized by many participants traveling to or while at their vacation destination. Most often, participants quickly stopped at a visitor/travel center to search out discounts and coupons for area entertainment and eateries.

Social Media

The utilization of social media was widespread throughout both segments of participants, with the majority indicating they routinely used some form of social media to gather information during the vacation planning process. Participants relied on social media mainly for travel reviews and personal recommendations from friends/family regarding destinations, accommodations, activities, and restaurants. Social media was also used to search for promotional opportunities (e.g., discounts, coupons) and specific information on their intended destination, accommodations, activities, etc.

Specific social media resources mentioned by participants are listed below (in order of frequency):

- TripAdvisor. TripAdvisor was consistently mentioned by participants as a travel website they go to for consumer reviews and ratings of vacation destinations, accommodations, leisure activities, etc. TripAdvisor’s consumer reviews were generally perceived as unbiased and credible. However, one or two participants did note that “You
can’t believe everything you read.” In addition, a few participants perceived its listed rankings of top accommodations and activities for a particular destination as particularly helpful in vacation planning.

- **Facebook.** Facebook was described by some participants as a helpful resource when seeking travel recommendations and reviews from friends and family. Participants said they posed questions to their friends/family about particular destinations or activities on their Facebook status updates. In addition, one or two participants said they visited the Facebook pages of attractions or accommodations they had already selected or were considering for their next vacation.

- **Yelp.** Similar to TripAdvisor, Yelp was a social media website frequently cited by participants in all groups as a reliable source for consumer reviews. Though primarily mentioned in regard to restaurant reviews, Yelp was also used for seeking out information about a destination’s leisure activities and entertainment options.

- **Groupon/LivingSocial.** Deal-of-the-day websites such as Groupon and LivingSocial were used by many participants in search of promotional deals/coupons. Participants sought out deals for entertainment, activities, restaurants, or accommodations in destinations where a future vacation had been planned or was a likely probability. As one participant said, “We’ll check them [Groupon/LivingSocial] out a few months before the trip to see if there is anything of interest.”

  In addition, participants said they regularly searched these sites for travel promotions that piqued their interest or were “a good deal,” which often motivated travel even if they were not planning a specific trip at the time. For these participants, Groupon served as a source of inspiration, prompting participants to consider new or additional destinations that were not top-of-mind.

- **YouTube.** One or two participants described using YouTube to search out videos, professional and homemade, on prospective travel destinations. These participants said
they were looking for reviews of different aspects of their prospective trip, new ideas of things to do, and a visual image or tour of where they would be vacationing.

- **Twitter.** Twitter was not cited as a source of information during vacation planning.

**Mobile Devices**

As previously stated, the use of mobile devices during leisure trips was widespread among group participants. Nearly all said they considered the use of their mobile devices invaluable during extended travel. Only one or two participants said they did not use mobile devices at all during travel and were, admittedly, less familiar with newer technologies.

The two primary types of mobile devices mentioned by participants were smartphones and GPS devices like Tom Tom or in-car voice-activated navigation systems.

- **Smartphones.** The majority of participants described using their smartphones extensively throughout their vacations. One iPhone user said, “I ask Siri everything” and another said, “I couldn’t live without it.” Some participants relied on smartphone GPS applications like Google Maps for directions and information searches (e.g., location of state parks, restaurant reviews).

Many participants used the various smartphone travel applications to search for consumer reviews and recommendations. Smartphone apps specifically mentioned by participants included (in order of frequency) Yelp, TripAdvisor, Urbanspoon, Kayak, Google, and Groupon. In addition, a number of participants said they simply utilized their smartphone internet browser in the same way they would on their home computer.

- **GPS devices.** Participants’ primary use of GPS devices, either stand-alone or in-car, were for directions when traveling. In addition, a few participants said they were able to use their GPS device to search for, and even read, reviews of accommodations, restaurants, and leisure activities. One participant said, “You can just press ‘food’ and it gives you the closest places.”
VACATIONING MORE IN NORTH CAROLINA

At the conclusion of groups, participants discussed topics related to vacationing more in North Carolina.

**Appealing North Carolina Vacation Destinations**

Participants mentioned appealing North Carolina vacation destinations that they had yet to visit. Types of destinations consistently mentioned by participants throughout groups are listed (categorically) below:

- **North Carolina beaches.** The Outer Banks was most frequently named by participants as an appealing in-state vacation destination. Two or three participants specifically mentioned wanting to see the wild horses of Corolla. Other attractive North Carolina beach destinations named by participants included Topsail, Carolina Beach, Holden Beach, and Cape Fear.

- **Mountains.** Many participants simply said they would like to visit “the mountains” of North Carolina when asked about appealing destinations. These participants were interested in outdoor activities (i.e., camping, hiking) and winter sports (i.e., skiing).

- **Historic sites.** Across groups, the Biltmore in Asheville was mentioned by a number of participants. One or two participants mentioned Raleigh as an historic location they would like to visit, but could not give any specific sites.

- **Metropolitan areas.** The metropolitan areas of Charlotte and Raleigh were mentioned by a few participants as attractive destinations because of the shopping and nightlife available.

- **Relaxation.** A few participants mentioned The Grove Park Inn as an appealing destination. (Should be noted one or two questioned whether it was still in business. Moderator, on behalf of Division team, clarified The Grove Park Inn remains open under new ownership.)
Barriers to North Carolina Travel

Participants were asked what barriers prevented them from traveling more in the state of North Carolina.

Cost. The majority of participants said high costs of travel were the single largest barrier to increased leisure trips, whether in-state or out of state. Travel expenses mentioned by participants that added to the high overall cost of vacationing included lodging, entertainment, food, and gas or airfare.

Lack of time. A number of participants cited the lack of time available for leisure travel as a barrier to increasing travel in North Carolina. A few said say would definitely travel more if their employer provided more paid vacation days.

Geography. This factor was particularly evident during the Charlotte groups; participants said that the distance and effort it took to visit eastern North Carolina destinations (e.g., Outer Banks) was a barrier to increased travel throughout the state. One or two said they could visit the South Carolina beaches just as, or more, easily than any North Carolina beaches.

Familiarity. A few participants said they had lived in North Carolina for a long time and were already familiar with most of the appealing travel destinations the state had to offer. However, these participants did say that would not keep them from future in-state travel, only that they would be more inclined to seek out new and unfamiliar out-of-state travel destinations. One participant said, “I’ve seen what’s available in North Carolina. I want to see more about other places.”

Not a real “vacation.” Although nearly all participants mentioned traveling in North Carolina at some point, either for shorter one to two day trips or longer vacations, some indicated that they did not perceive in-state leisure trips as true vacations. As one participant stated, “Staying in North Carolina is not a real vacation.”
**Family size/pets.** A few participants said that vacationing with a larger family or group was often a barrier to travel. Not only were costs higher in general (e.g., entertainment, food) because of the additional people, but participants also cited difficulties locating and affording the accommodations needed for larger groups – either finding suitable rental homes or affording the higher costs of multiple hotel rooms. It is also important to note that a few participants mentioned the difficulty in locating pet-friendly accommodations or affording the high costs of boarding their animals while away.

**Infrastructure.** A couple of participants stated the highway systems in Eastern and Southeastern North Carolina were difficult to navigate and in poor condition (e.g., “The highway system for Southeastern North Carolina is pitiful”).

**Motivations for Increased North Carolina Travel**

Participants were asked to suggest what might motivate them to vacation more in the state.

**Cost-saving opportunities.** The opportunity for increased cost-savings through travel discounts was suggested by participants as the greatest motivator for increased travel in North Carolina. Participants were more inclined to travel (in or out of state) when they perceived they had gotten a “good deal.” This was especially true with regard to accommodations, which were viewed by many as the most expensive aspect of most trips. As one participant said, “We went to the Biltmore with a huge discount, we wouldn’t go without it.”

Specific types of appealing travel savings mentioned by participants are listed below:

- **Package deals.** The ability to package/combine trip accommodations and food (i.e., restaurant discounts) and/or entertainment/activity options (e.g., theater tickets, spa discounts) into a single lower priced bundle was seen as motivating. For example, one participant suggested that golf and lodging packages would be appealing. Lodging specials offering a free extra-night stay (i.e., “Stay two nights, get the third night free.”) for meeting certain requirements were also seen as attractive to some participants.
➢ **Deal-of-the-day websites.** Websites like Groupon and LivingSocial were consistently mentioned by participants as a source for regional “travel deals.” As previously mentioned, many said they frequently searched these sites for deals on destinations (or activities) that they planned to visit or would be interested in visiting.

➢ **Deals offered through direct marketing.** A number of participants said they received daily or weekly emails/newsletters from companies in the tourism industry (e.g., hotels, airlines, AAA, travel agencies, travel websites - Travelzoo). One or two participants said they were always “on the lookout” for good deals.

➢ **North Carolina resident pricing.** Special pricing for North Carolina residents was suggested, unaided, by one *non-visitor* participant to motivate travel to in-state destinations. Additional group participants readily agreed that discounted resident pricing would be appealing and would motivate in-state travel. As one participant said, “Florida does it all the time for Disney.”

➢ **Offseason pricing.** A few participants said they were more likely to travel to a destination during its offseason to take advantage of lower pricing offers on lodging and entertainment.

**All-inclusive resorts.** All-inclusive resorts were mentioned by a number of participants as a way to motivate resident travel in North Carolina. Specifically, participants said the comfortable and stress-free environment all-inclusive resorts afforded them by providing for all their vacation needs (e.g., lodging, entertainment, food) in one location was very appealing. In addition, having a single all-inclusive price and the ability to pay in advance were other attractive aspects of all-inclusive resorts.
Additional attractions. Some participants commented they would travel more in-state if there were more attractive destinations and activities available in North Carolina. Examples of appealing attractions suggested by participants are as follows:

- **Amusement parks.** A few participants commented they would like to see more attractions in the state similar to amusement parks. One participant said, “Like Disney, but not as big.”

- **Family-friendly resorts.** A few participants said they would like to see more family-friendly resorts that offered activities that would appeal to all ages. As one participant commented, “The Sands Resorts in South Carolina have kids clubs where you don’t have to be with them [kids] all the time.”

- **Casinos.** A few participants suggested the availability of additional (they did note “one or two” already existed) and more appealing casinos would increase motivation for travel in North Carolina. To increase the appeal of current North Carolina casinos, participants commented that, “They need to allow alcohol” and “They should have more [table games] than just slots.” (Moderator, on behalf of Division team, confirmed Harrah’s Cherokee offers alcoholic beverages and table games.)

- **Historical tours.** One or two participants commented they would like to see more historical tours offered in North Carolina, adding, “There’s so much history in this state.”

**Competitive Marketplace**

As noted earlier, awareness of partner in-state tourism advertising was low across groups. Participants said they would be more inclined to increase travel in North Carolina if they were more aware of travel opportunities available throughout the state. As one participant said, “I need some prompting, some travel ads or something.”

In contrast, when asked if they recalled any out-of-state tourism campaigns, participants named numerous campaigns from across the U.S. Out-of-state campaigns mentioned included “Visit
California” (featuring multiple celebrities), Florida (promoting golf and Disney World), “Virginia is for lovers,” West Virginia ski resorts, Las Vegas, “Visit the Gulf” (Gulf Coast), Robert Trent Jones Golf Trail (Alabama), and Michigan.