

1. Please indicate in which month you and/or other members of your household traveled 50 miles or more, one-way, away from home (including day trips) or spent one or more nights.

	Charlotte	Competitive Set	United States
January 2008	11.8%	12.2%	11.8%
February 2008	11.0	11.0	11.2
March 2008	11.5	12.1	11.8
First Quarter	34.3	35.3	34.8
April 2008	10.5	10.6	10.9
May 2008	11.6	11.1	11.0
June 2008	8.9	9.9	10.3
Second Quarter	31.0	31.6	32.2
July 2008	9.2	9.2	9.4
August 2008	7.1	7.6	7.8
September 2008	5.9	5.3	5.5
Third Quarter	22.2	22.1	22.7
October 2008	4.8	4.3	4.2
November 2008	4.0	3.7	3.3
December 2008	3.5	2.9	2.7
Fourth Quarter	12.3	10.9	10.2

Competitive set includes: Atlanta, Greenville SC, Raleigh, Richmond and Norfolk

2. Please select the primary purpose of your trip.

	Charlotte	Competitive Set	United States
Leisure	68.2%	63.3%	74.9%
Personal Business	6.6	7.0	6.2
Business	22.9	26.1	16.1
Other	2.3	3.6	2.8
<i>Total</i>	<i>100%</i>	<i>100%</i>	<i>100%</i>
Leisure			
Visit Friends/Relatives	47.2	41.0	40.4
Outdoor Recreation	4.8	4.1	6.9
Entertainment/Sightseeing	6.7	7.1	12.0
Other Personal/Pleasure	9.5	11.1	15.7
<i>Leisure Subtotal</i>	<i>68.2%</i>	<i>63.3%</i>	<i>74.9%</i>
Business			
General Business	18.1	18.1	12.0
Convention/Conference	4.8	5.7	4.1
<i>Business Subtotal</i>	<i>22.9%</i>	<i>23.8%</i>	<i>16.1%</i>

3. Did you extend your business trip for leisure purposes?

	Charlotte	Competitive Set	United States
Yes	22.6%	10.7%	13.1%

4. Which of the following was the primary mode of transportation for your trip?

	Charlotte	Competitive Set	United States
Own Auto/Truck	67.1%	67.5%	69.8%
Airplane	19.3	21.5	17.2
Rental Car	6.6	4.4	4.4
Camper/RV	1.8	0.4	0.9
Motorcoach/Group Tour	0.2	0.2	0.4
Bus	1.1	0.9	1.1
Other	3.5	3.1	3.7

5. Average party size

	Charlotte	Competitive Set	United States
Under 18	0.4	0.5	0.6
18 +	1.7	1.7	2.2
Total	2.1	2.4	2.8

6. Of the nights you stayed, how many nights did you stay in the following accommodations?

Accommodations	Charlotte		Competitive Set		United States	
	Nights	%	Nights	%	Nights	%
Private Home	1.9	52.8	1.7	50.0	1.5	44.1
Hotel	1.4	38.9	1.4	41.2	1.3	38.2
Condo	0.1	2.8	0.1	2.9	0.1	2.9
RV/Tent	0.1	2.8	0.1	2.9	0.2	5.9
Other	0.1	2.8	0.0	0.0	0.3	8.8
Total Nights Stayed	3.6	100%	3.4	100%	3.4	100%

7. States visited per trip

	Charlotte	Competitive Set	United States
States visited/trip	1.2	1.3	1.2

8. Overnight stay vs. day trip

	Charlotte	Competitive Set	United States
Stayed overnight	83.0%	71.8%	68.6%
Did not stay overnight	17.0	28.2	31.4

9. Average length of stay

	Charlotte	Competitive Set	United States
Nights	3.2	2.7	2.6

10. In which hotel brand did you stay the longest? (CLT Top) Satisfaction = % in top 2 boxes- (satisfied)

Brand	Charlotte		Competitive Set		United States	
	%	Satisfaction	%	Satisfaction	%	Satisfaction
Marriott Hotels/Resorts	11.7	77.2	10.9	88.4	7.0	90.0
Hampton Inn & Suites	10.0	100	7.7	89.8	4.5	89.9
Comfort Inn/Suites	5.5	80.3	4.7	75.7	5.5	74.5
Best Western	5.5	63.5	4.9	75.6	7.2	70.7
Courtyard by Marriott	5.1	79.1	2.7	85.5	1.8	82.0
Holiday Inn	4.7	74.3	4.6	79.4	4.1	73.4
Days Inn	4.4	100	6.0	55.6	3.6	61.9
Hyatt	3.8	63.7	2.9	93.4	1.9	84.7
Holiday Inn Express	3.4	100	4.1	91.1	4.5	83.2
Embassy Suites	3.0	100	4.2	79.4	1.7	84.9

11. Please check all of the following activities you did or attractions you visited. (CLT Top)

	Charlotte	Competitive Set	United States
Visiting Relatives	25.8%	26.4%	27.4%
Visiting Friends	23.2	17.5	17.4
Shopping	18.9	19.8	19.9
Fine Dining	13.1	14.6	14.1
Rural Sightseeing	11.1	8.5	14.1
Nightclubs/Dancing	9.0	6.7	5.2
Urban Sightseeing	7.4	10.0	10.3
Historic Sites	4.5	6.9	7.6
Museums	4.0	7.4	7.2
Theme Parks	3.5	4.4	4.9
NASCAR/Motorsports	3.0	0.8	0.7

	Charlotte	Competitive Set	United States
Average Number of Activities	2.2	2.3	2.2

12. Charlotte MSA average visitor spending - per party/per trip

	Charlotte	%
Lodging	\$141.00	30.5%
Food & Beverage	\$105.00	22.7
Local Transportation, Parking	\$103.00	22.3
Shopping/Souvenirs	\$51.00	11.0
Entertainment	\$34.00	7.3
Groceries	\$20.00	4.3
Amenities (golf, spa, etc.)	\$7.00	1.5
Other	\$2.00	0.4
Total	\$463	100%

13. Please indicate how far in advance you decided to travel to your destination.

	Charlotte	Competitive Set	United States
Less than 2 weeks before the visit	41.6%	40.7%	42.7%
Within 2 weeks to 4 weeks of visit	17.0	14.6	14.2
At least 1 month, but less than 3 months before the visit	20.9	20.1	18.0
At least 3 months, but less than 6 months before the visit	11.8	12.2	11.3
At least 6 months, but less than 1 year before the visit	4.1	7.3	8.3
More than a year before the visit	4.6	5.1	5.5

14. What sources did you use in planning your trip?

	Charlotte	Competitive Set	United States
Offline Sources	50.9%	46.1%	51.7%
Corporate travel department	2.8	3.3	2.7
Destination printed material	2.5	2.1	3.7
Friends/relatives	22.6	19.1	20.36
Magazine	2.1	1.0	1.7
Newspaper	1.2	0.4	1.2
Own experience	26.5	24.8	29.4
Radio	1.0	0.5	0.8
TV	1.8	1.1	1.4
Travel agent	2.2	1.0	1.9
Travel book	2.2	1.8	3.3
Travel club (AAA)	3.5	4.0	3.9
Travel provider (airline, hotel, rental car, etc.)	3.2	2.6	2.7
Other offline	1.1	1.8	2.0
Online Sources	23.3	27.8	27.2
Corporate desktop travel tool/internet	3.1	2.5	2.0
Destination website (official site of destination or attraction)	7.2	8.8	10.9
Online full service travel website (Travelocity, Expedia, etc.)	7.7	8.3	8.5
Traditional travel agency website	0.1	1.5	1.1
Travel provider website (airline, hotel, rental car, etc.)	8.6	10.2	10.2
Other online	1.5	2.4	2.9

15. What methods did you use for booking your trip?

	Charlotte	Competitive Set	United States
Offline Sources	41.4%	35.6%	41.3%
Corporate travel department	9.3	8.3	7.8
Directly with destination or attraction	15.3	11.5	15.2
Directly with travel provider	11.6	10.9	12.3
Travel agent	3.4	2.9	4.1
Travel club (AAA)	3.9	3.2	4.4
Other offline	1.5	1.9	3.3
Online Sources	49.4	54.0	51.8
Corporate desktop travel tool/internet	9.1	7.2	5.2
Destination website	11.2	10.9	12.4
Online full service travel website (Travelocity, Expedia, etc.)	15.3	16.6	15.8
Traditional travel agency website	0.6	1.7	2.1
Travel provider website (airline, hotel, rental car, etc.)	13.2	19.4	20.6
Other online booking method	3.1	3.7	4.0

16. Please indicate your satisfaction with each destination visited. (Top 2 boxes –extremely/very satisfied)

Charlotte		Competitive Set		United States	
% in top 2 boxes	Average on 5 pt. scale	% in top 2 boxes	Average on 5 pt. scale	% in top 2 boxes	Average on 5 pt. scale
85.7	4.2	84.5	4.3	84.3	4.3

17. Which US metropolitan areas do you plan to visit in the next two years? Percentage of respondents answering “Charlotte”.

	Charlotte	Competitive Set	United States
Charlotte	47.9%	12.6	7.3

18. Residence (CLT Top 10 feeder states)

	Charlotte	Competitive Set	United States
North Carolina	22.6%	16.1%	3.3%
South Carolina	11.5	7.5	1.6
Florida	8.5	7.5	6.1
Georgia	7.9	14.2	3.2
Virginia	7.0	11.1	3.0
Ohio	5.2	2.1	3.8
New York	3.9	3.4	5.5
Tennessee	3.5	4.0	1.9
Pennsylvania	2.7	2.9	3.8
New Jersey	1.8	1.7	2.6

19. Designated Marketing Area (DMA) CLT Top 10 DMA feeder markets

	Charlotte	Competitive Set	United States
Atlanta	6.4%	7.4%	2.2%
Greensboro/High Point/Winston-Salem	6.3	2.9	0.5
Raleigh/Durham	5.9	4.7	1.1
Charlotte	5.7	3.8	1.0
Greenville/Spartanburg	5.5	5.0	0.7
New York	4.3	4.5	5.6
Columbia, SC	3.1	1.5	0.4
Miami/Ft. Lauderdale	2.6	1.8	1.0
Roanoke/Lynchburg	2.3	1.7	0.5
Orlando/Daytona Beach/Melbourne	2.3	1.5	1.3

DMA is a registered service mark of Nielsen Media Research, Inc.

20. For each comment, please indicate how well it describes you. Percentage in top 2 boxes – describes perfectly or describes quite well.

	Charlotte	Competitive Set	United States
I frequently search magazines and websites for information about travel destinations and tourism operators I'm interested in.	45.6%	47.4%	45.2%
I often go out of my way to find travel and tourism operators that offer really genuine, authentic experiences	31.0	32.1	32.1
I frequently adapt products I've bought to suit my own tastes and needs	63.6	63.1	59.9
I love to relive my travel experiences by discussing them with other people	73.4	65.7	66.3
The ethics of travel and tourism companies has a big influence on what operators I use	41.7	42.8	42.8
My life just keeps getting busier and busier	68.1	70.1	68.4
My family and friends often ask my advice on travel matters	44.0	43.1	41.6
I'm a real label reader. I won't buy anything without reading the small print	48.0	51.5	51.4
I am prepared to pay more to visit places or use operators that offer something really original	42.7	40.8	39.7
I love hunting out the newest travel experiences before anyone else catches on to them	24.2	22.5	23.1
I buy environmentally friendly products and services whenever possible	50.6	53.6	53.3
Anything that saves me time is worth paying extra for	46.4	46.7	45.2
I love shopping in markets and small specialty stores	57.1	57.1	56.5
When I find a new travel destination or tourism operator that I really like I have to tell others about it	54.4	52.1	53.0
My choice of brands is important – I believe that what I buy says something about who I am	41.4	38.3	35.2
I make a genuine effort to support travel and tourism companies that put something back into the community	31.8	34.3	34.5
I often read packs and websites to find out more about products and services that I'm buying	63.3	64.7	62.3
I admire imaginative travel brands that do things differently than others	43.2	41.4	40.8
I love in-store demonstrations of new products and services – I just can't walk past them	35.9	34.1	34.4
I rarely seem to have time to do the things that are really important to me in my life	38.2	41.2	41.3

21. Future View (categorized based upon responses to #20, description on page 12)

	Charlotte	Competitive Set	United States
Future Shapers	11.5%	12.4%	10.3%
Future Makers	21.8	19.5	20.3
Today Consumers	41.9	40.1	38.8
Yesterday Consumers	16.4	19.6	19.6
Yesteryear Consumers	7.5	6.8	9.6

DEMOGRAPHICS***Household Income***

	Charlotte	Competitive Set	United States
Less than \$40,000	32.2%	31.0%	31.8%
\$40,000 - \$79,999	32.4	35.9	34.4
\$80,000 - \$124,999	20.1	22.5	23.3
\$125,000 or more	11.3	10.7	10.3
Average	\$70,000	\$70,660	\$65,300

22. Marital Status

	Charlotte	Competitive Set	United States
Now married	55.9%	55.1%	59.9%
Never married	22.4	21.3	18.9
Divorced, widowed, separated	21.7	23.7	21.2

23. Ethnicity

	Charlotte	Competitive Set	United States
White	77.8%	73.7%	87.3%
Black/African American	18.9	22.4	6.9
Asian/Pacific Islander	0.9	1.5	2.3
American Indian/Aleut Eskimo	0.8	0.3	0.6

24. Education (head of household gender)

Highest Level Achieved	Charlotte		Competitive Set		United States	
	Female	Male	Female	Male	Female	Male
Graduated High School	10.6%	10.1%	11.4%	9.1%	13.4%	11.1%
Some College	21.7	18.0	24.8	14.1	24.0	17.9
Graduated College (2 year degree)	10.7	6.6	9.4	5.8	9.4	6.5
Graduated College (4 year degree)	26.7	19.5	24.8	19.1	22.3	18.4
Post Graduate Degree	9.6	10.5	12.7	12.1	12.3	11.5

25. Employment (head of household gender)

	Charlotte		Competitive Set		United States	
	Female	Male	Female	Male	Female	Male
Full Time	41.2%	48.2%	44.6%	45.6%	39.6%	47.5%
Part Time	9.3	3.1	13.1	3.1	13.5	4.0
Retired	12.7	9.6	11.2	8.8	12.4	11.9
Not Employed	15.6	2.5	14.2	2.5	16.1	3.2

26. Household Size

	Charlotte	Competitive Set	United States
1	22.9%	22.7%	21.1%
2	31.3	33.2	35.1
3	21.9	17.8	18.0
4	16.1	16.1	15.6
5+	7.8	10.2	10.2

27. Presence of Children in Household

	Charlotte	Competitive Set	United States
Under 18	38.8%	36.9%	35.0%

28. Home Ownership

	Charlotte	Competitive Set	United States
Own/Buying	72.9%	66.9%	69.4%
Rent	20.2	24.9	24.0
Live with relatives (in their home)	3.8	5.1	3.7
Other	0.2	1.2	1.6
No answer	2.9	1.8	1.3

29. How old are you?

	Charlotte	Competitive Set	United States
18 - 24	7.6%	7.5%	6.8%
25 - 44	46.7	45.8	41.4
45 - 64	34.3	35.0	38.0
65+	11.4	11.7	13.8
Average age	44.9	44.8	46.4

30. What is your gender?

Charlotte		Competitive Set		United States	
Female	Male	Female	Male	Female	Male
56.0%	44.0%	58.3%	41.7%	55.8%	44.2%

FutureView™ Categories

TNS FutureView™ is a market research tool that identifies “Future Shapers,” those leading edge consumers who quickly adopt a new product and influence others to do the same. Marketers need to target their new product communications to this group since they have such an influential role in bringing new products into the mainstream. Future shapers are defined by seven characteristics:

- They value authenticity and originality in all they buy and experience
- They are well informed and hugely involved in the products, services, and brands they buy
- They are individualistic - doing things “my way” and increasingly demanding that companies do too
- They are time-poor and value anything that saves them time
- They are socially responsible - and exercise their ethical awareness via their product and brand choices
- They are curious, open-minded, and receptive to new ideas
- They are advocates of new ideas - and they spread the word

