



Cabarrus County CVB 2014 Visitor Profile Research & Visitor Economic Impact

Prepared for:

- *Cabarrus County Convention & Visitors Bureau*

Preliminary Report Presentation: April 16, 2015

Research Team Experience

- Destination research and strategic planning
- Development and management of conference centers
- Research for 100+ destinations in 26 states
- Communities, regions and states
- Travel industry focused
- National research data and trends analysis
- Writing and speaking
- Board workshops & planning sessions
- Listening to travelers

General Research & Findings Overview

1

Build a Cabarrus County visitor profile to guide future marketing and sales strategies.

2

Help maximize ROI through the allocation of resources based on research data

3

Assess the current segmentation of overnight and daytripper visitation and visitor behavior to Cabarrus County

4

Assess overall Cabarrus County lodging market and analysis of key metrics; identify need periods and develop strategies to increase overall room demand.

5

Calculate the impact of visitor spending on the Cabarrus County economy.

Market Research Completed:

1.

- Long-term Strategic Plan – Destination Cabarrus 2012 – 2020

2.

- Lodging Market Analysis - Lodging Survey, STR Analysis and Hotelier Interviews
 - Conducted initial study in 2010; Updated Study in 2015

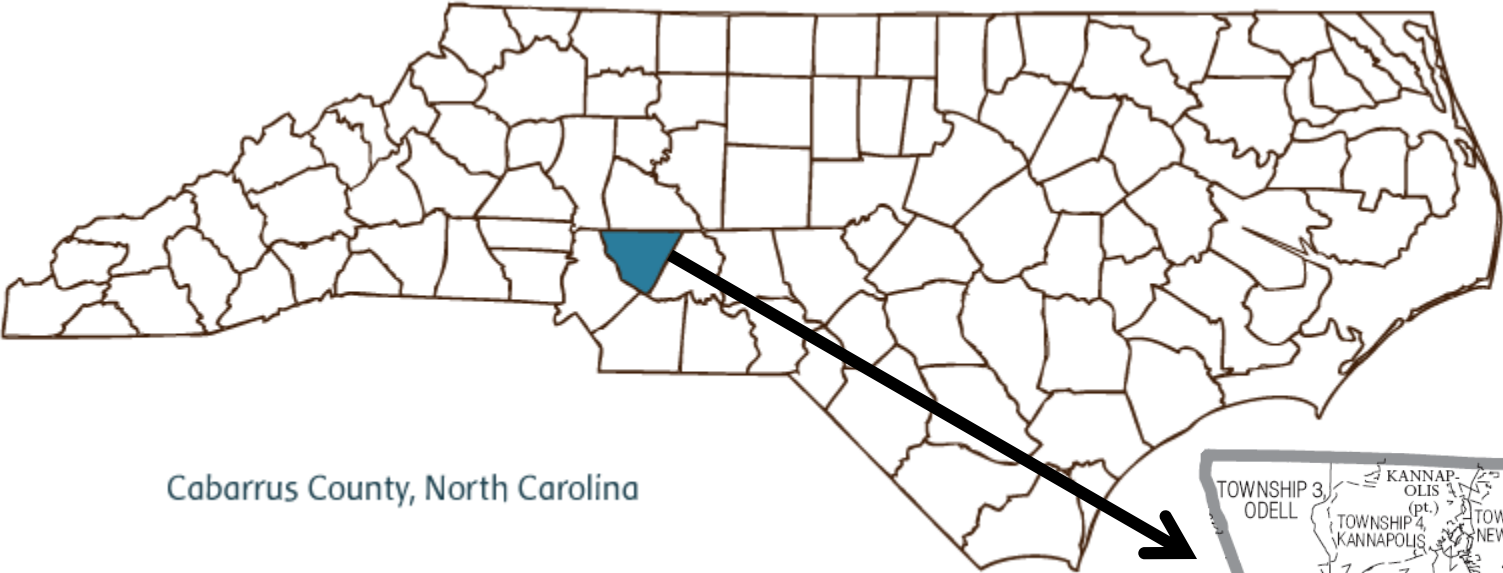
3.

- Visitor Profile Research by Market Segment (online surveys):
 - Collected over a 2-year period 2012 – 2014
 - A total of 1,272 visitor surveys collected

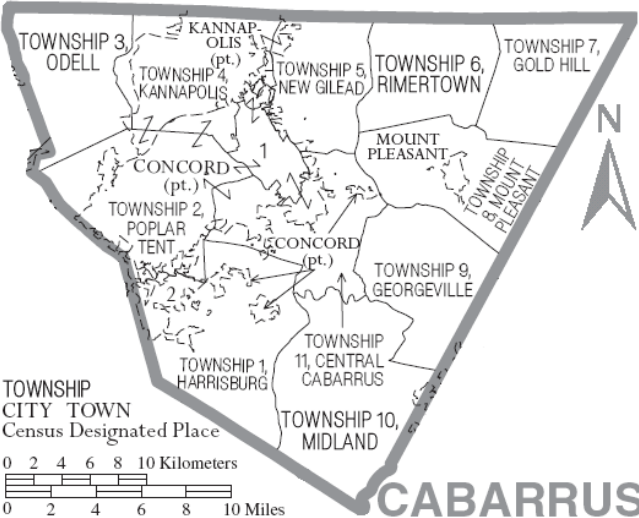
4.

- Economic Impact Model compared to TEIM Data for Cabarrus County

Cabarrus County as a Destination

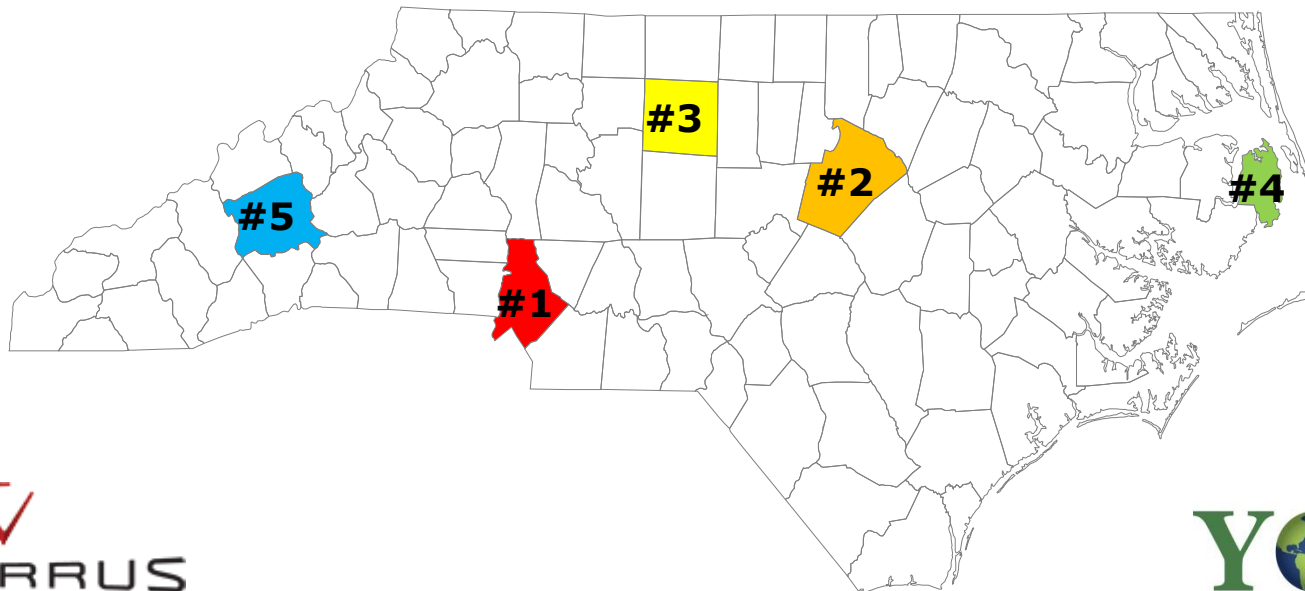


Cabarrus County, North Carolina





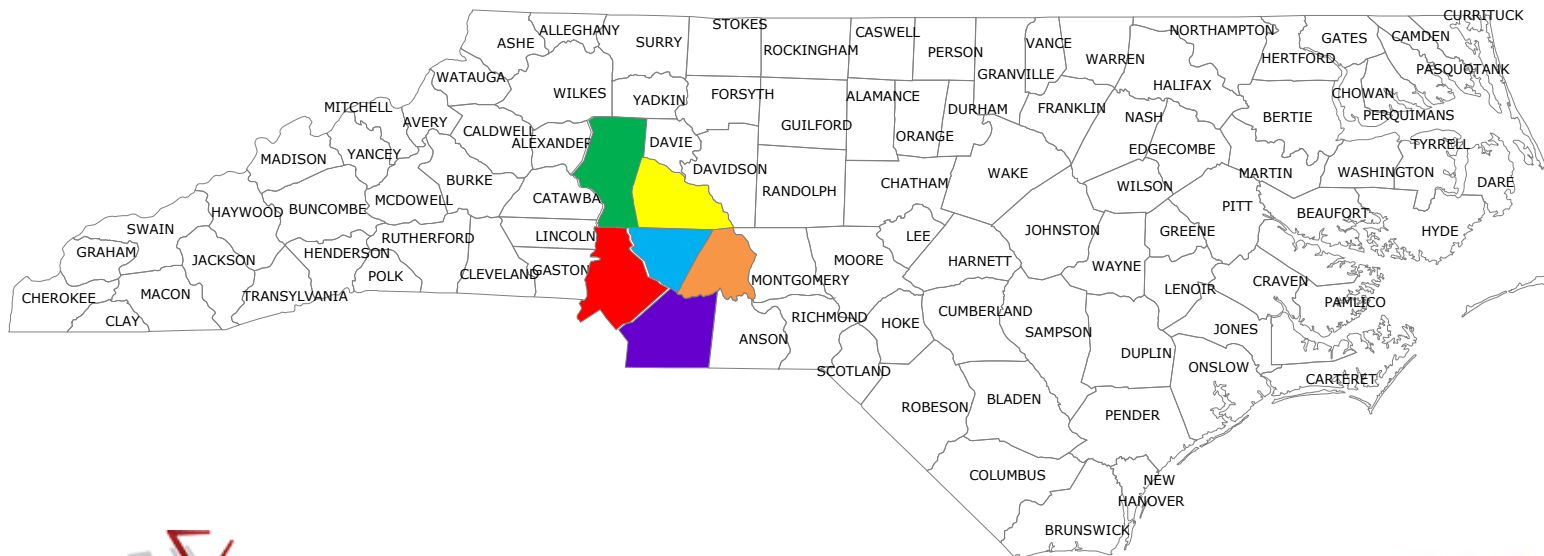
Top 5 NC Counties by Visitor Expenditures in 2013

Parish/County	Rank within North Carolina	Visitor Spending FY2013 in millions
MECKLENBURG	#1	\$ 4,610.04
WAKE	#2	\$ 1,883.01
GUILFORD	#3	\$ 1,206.74
DARE	#4	\$ 953.04
BUNCOMBE	#5	\$ 901.28



Cabarrus & Contiguous Counties in NC

County	2013 Rank within North Carolina	Visitor Spending FY2012 (in millions)	Visitor Spending FY2013 (in millions)	Variance (+/-)
 MECKLENBURG	#1	\$ 4,404.86	\$ 4,610.04	4.6%
 CABARRUS	#12	\$ 362.97	\$ 371.87	2.5%
 IREDELL	#20	\$ 205.73	\$ 212.61	3.3%
 ROWAN	#28	\$ 137.74	\$ 145.28	5.4%
 UNION	#36	\$ 108.62	\$ 112.76	3.8%
 STANLEY	#49	\$ 69.24	\$ 70.68	2.1%





Cabarrus County Lodging Market Analysis

Lodging - Current 2015 Lodging Inventory - Area / Age

Cabarrus County Hotel/Motel Exit 49 – 12 properties	Open Date	Rooms
Hampton Inn & Suites	Jan-00	125
Holiday Inn Express	Apr-00	79
Sleep Inn & Suites	Jul-00	116
Comfort Suites	Oct-00	84
Wingate by Wyndham	Mar-01	93
Springhill Suites	Jul-01	95
Suburban Extended Stay	May-03	101
Embassy Suites & Convention Center	Jan-07	308
Great Wolf Lodge	Mar-09	402
Residence Inn by Marriott	May-09	130
Courtyard by Marriott	Aug-09	123
Hilton Garden Inn	Mar-10	118
% of Inventory / total Rooms	63.6% / 1,774	

Cabarrus County Hotel/Motel Exit 58/60 – 12 properties	Open Date	Rooms
Affordable Corporate Suites	N/A	31
Rodeway Inn (formerly Mayfair Motel)	N/A	45
Howard Johnson Concord	Jun-70	91
America's Best Value Inn	Jul-86	32
Econo Lodge	Sep-87	70
Hampton Inn	Feb-96	101
Comfort Inn & Suites Kannapolis Concord (formerly Fairfield Inn by Marriott)	Jul-96	84
Sleep Inn Concord	Oct-98	85
Home-Town Suites	Jan-99	80
Microtel Inn & Suites	Apr-99	59
Holiday Inn Express & Suites Concord	May-03	81
Country Inn & Suites	May-10	80
% of Inventory / total Rooms	30.1% / 839	

Cabarrus County Hotel/Motel Other – 4 properties	Open Date	Rooms
Affordable Corporate Suites – Exit 52	N/A	29
Carolina Country Inn – Mt. Pleasant	Jun-65	26
Days Inn	Jun-70	75
Motel 6 – Exit 63 (formerly America's Best Value Inn)	Dec-97	45
% of Inventory / total Rooms	6.3% / 175	



Source: STR Lodging Data for Cabarrus County – no Great Wolf Lodge



Cabarrus County Overall Lodging Room Inventory

Cabarrus County Lodging Inventory	Hotel/Motel Rooms – 85.6% Inventory	Great Wolf Lodge – 14.4% Inventory	Total Rooms 100% Inventory
# of Rooms	2,386	402	2,788



Cabarrus Hotel/Motel Room Inventory (GWL Rooms Excluded)		
Exit 49 57.5% Inventory	Exit 58/60 35.2% Inventory	Other 7.3% Inventory
1,372	839	175

Lodging - Age of Lodging Inventory by Geographic Area and Decade

AGE OF CABARRUS COUNTY LODGING INVENTORY BY DECADE – EXIT 49 & EXIT 58/60

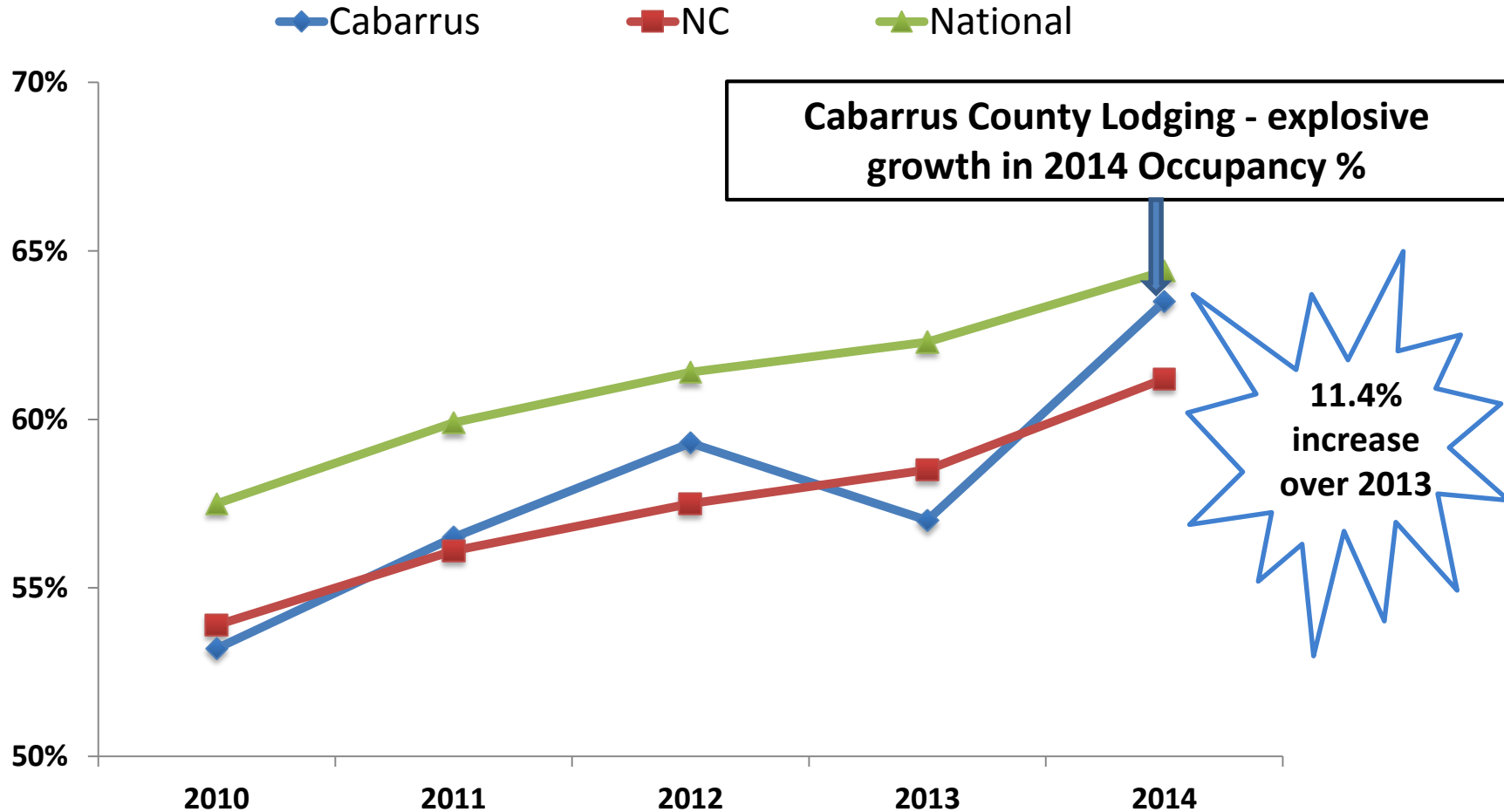
Decade	Exit 49 Inv.	% of Total	Exit 58/60 Inv.	% of Total	Other Inv.	% of Total
Prior to 1980	0	0.0%	167	19.9%	130	74.3%
1980 - 1989	0	0.0%	102	12.2%	0	0.0%
1990 - 1999	0	0.0%	409	48.7%	45	25.7%
2000 - 2009	1,656	93.3%	81	9.7%	0	0.0%
2010 - current	118	6.7%	80	9.5%	0	0.0%
TOTAL INVENTORY	1,774	100.0%	839	100.0%	175	100.0%

Decade	Total # of Rooms by Decade	Total % of Rooms by Decade
Prior to 1980	297	10.7%
1980 - 1989	102	3.6%
1990 - 1999	454	16.3%
2000 - 2009	1,737	62.3%
2010 - current	198	7.1%
TOTAL INVENTORY	2,788	100.0%

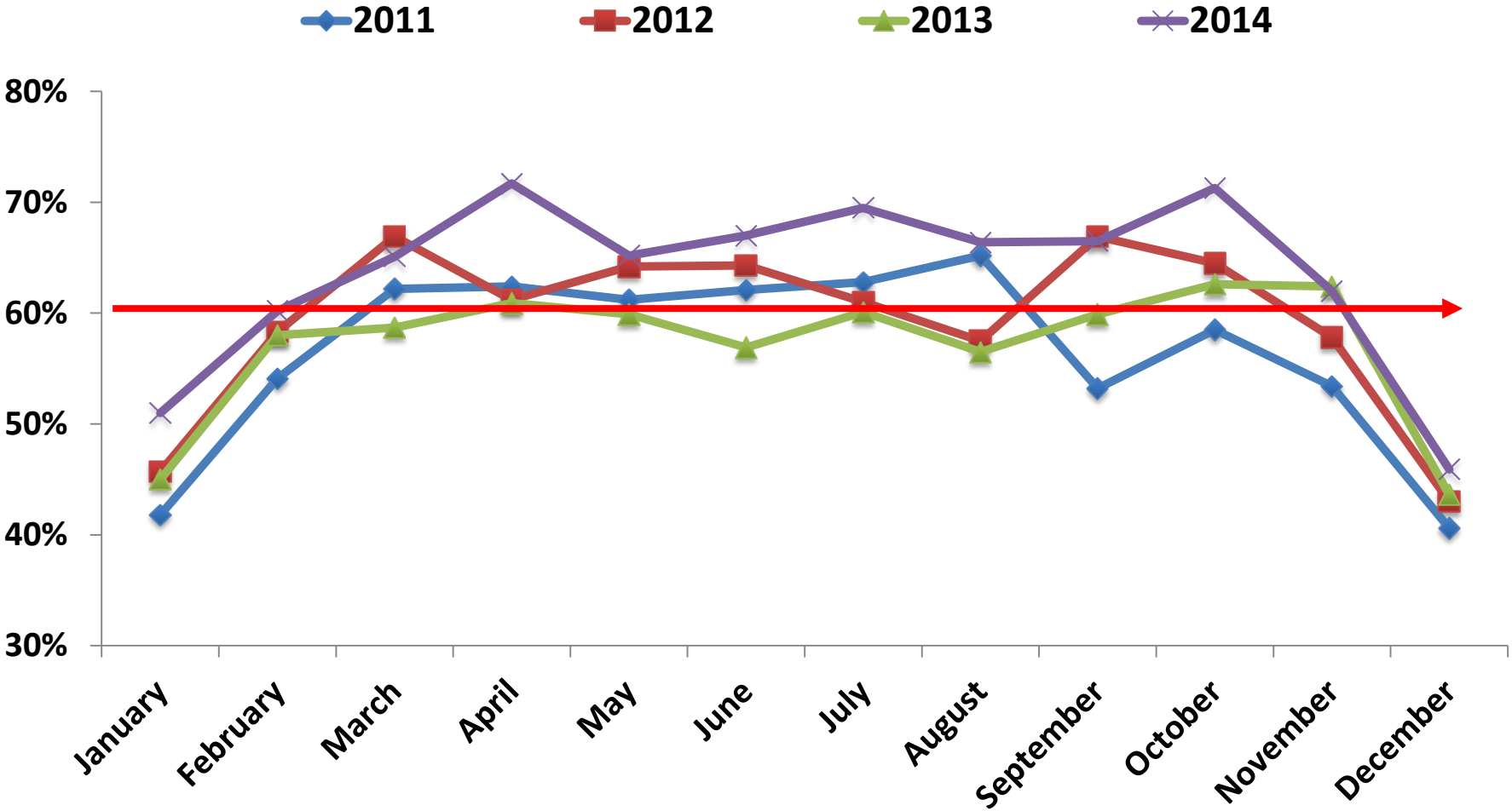
Cabarrus County 2014 Market Segmentation

ALL	Exit 49	Exit 58/60	Market Segment
41.9%	37.8%	55.0%	Individual – Business
27.9%	29.2%	22.3%	Individual business travellers (white collar)
14.0%	8.6%	32.7%	Skilled workers
30.7%	35.6%	15.7%	Group/Meetings/Conference
14.7%	18.4%	2.8%	Conference/Meeting
8.6%	9.2%	7.0%	Team sports/events/tournaments
5.8%	6.2%	4.8%	Motorsports or NASCAR related
1.6%	1.8%	1.1%	Group tour/Motorcoach
20.6%	22.7%	13.6%	Leisure
10.8%	12.7%	4.6%	Motorsports or NASCAR related
9.8%	10.0%	9.0%	Tourists visiting the area (local attractions, VFR, etc.)
6.8%	3.9%	15.7%	Transient
5.7%	3.7%	13.4%	Transient – passing through as part of a longer trip
1.1%	0.2%	2.3%	Other

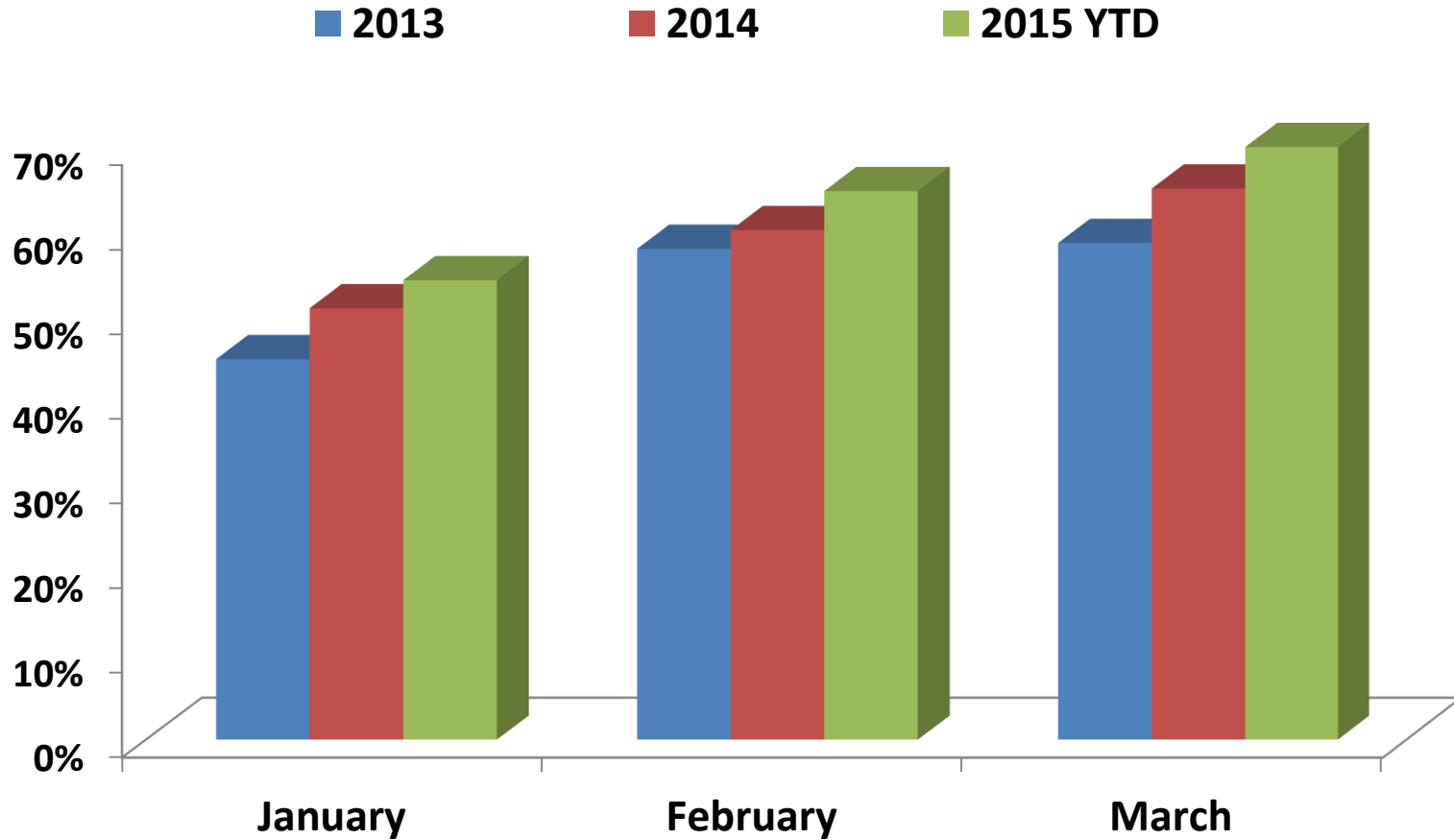
5-YR Occupancy – Cabarrus / State of NC / National



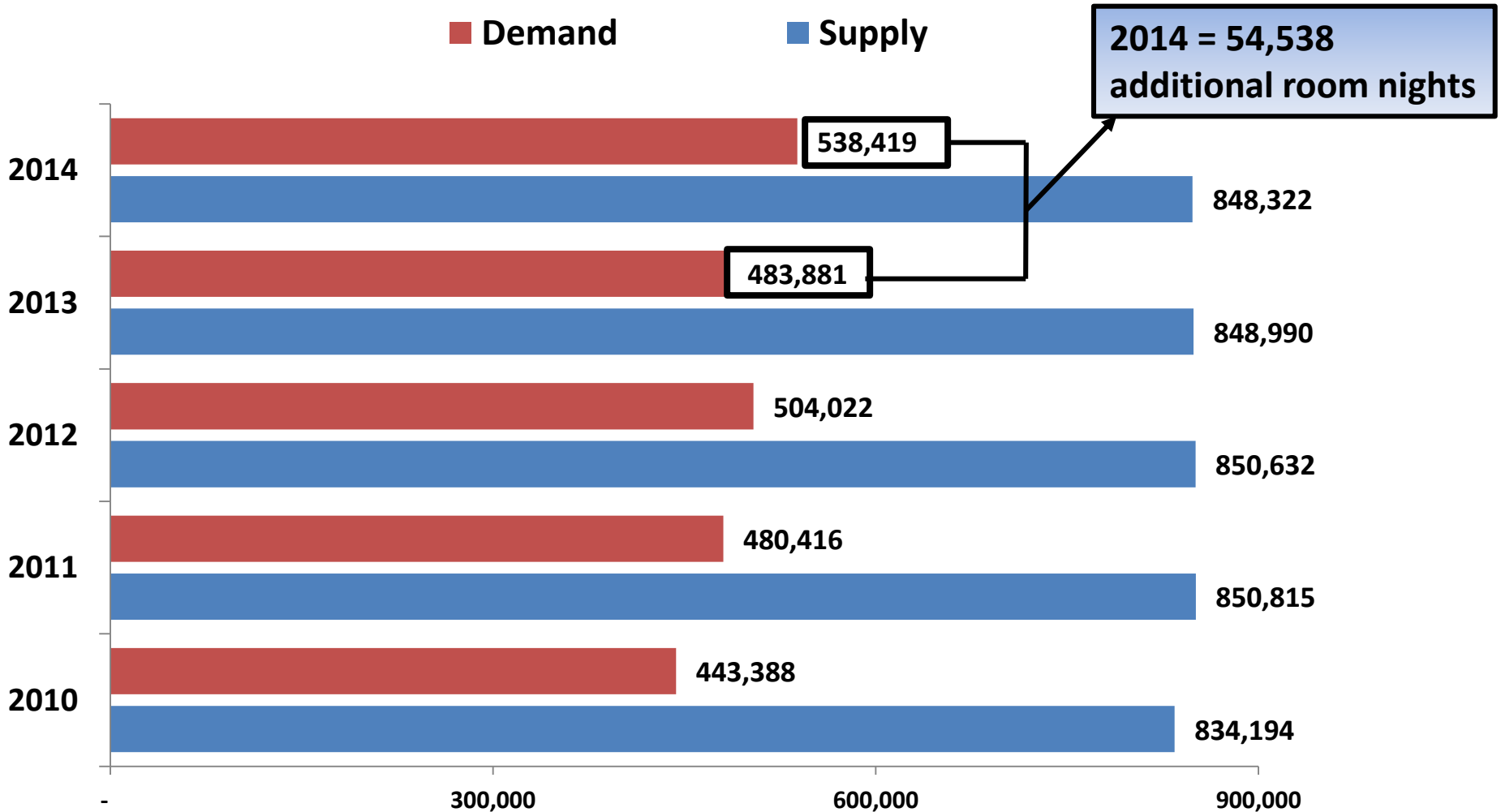
4-YR Trend Occupancy by Month



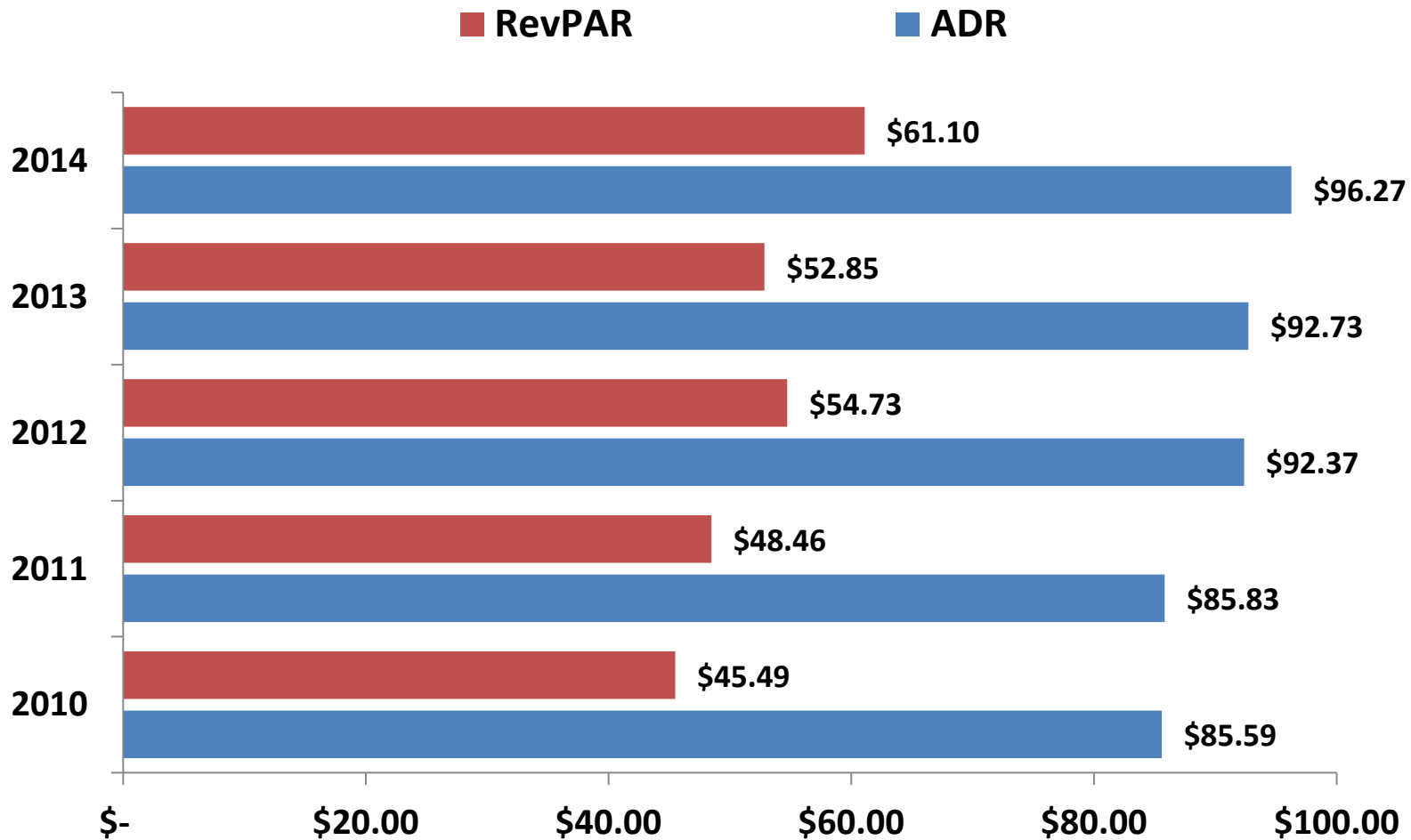
1ST Quarter 2013 – 2015 Occupancy Trend



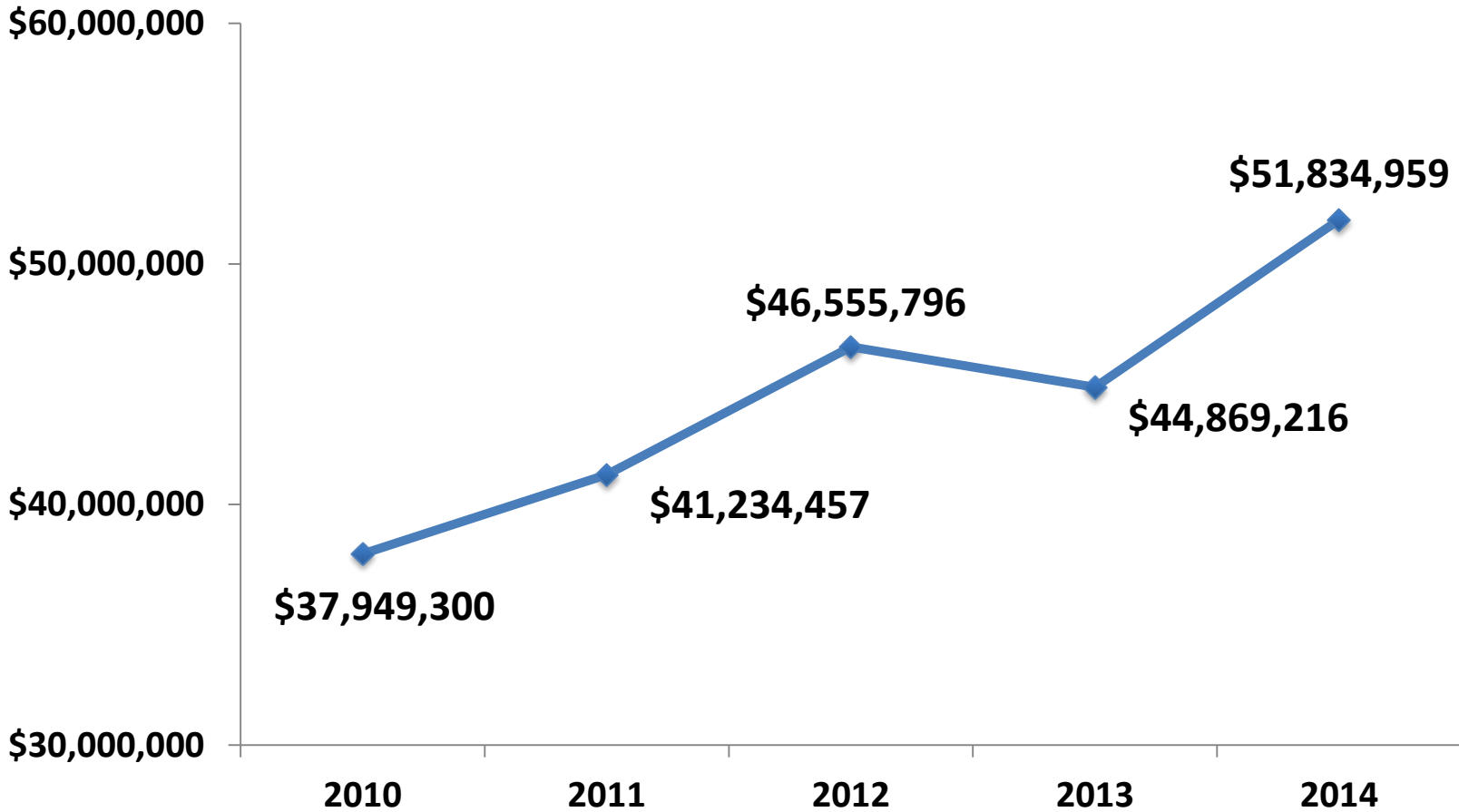
6-YR Supply and Demand Trends



6-YR ADR vs RevPAR Trend



6-YR STR Revenue Trends



Source: STR Lodging Data for Cabarrus County – no Great Wolf Lodge



Lodging - Booking Sources & Leisure Feeder Markets

Booking Source	Rank Order	# of Responses
1. Your Direct Hotel	2.00	14
2. Central reservation office	2.25	16
3. Hotel's website	2.69	16
4. Expedia	3.47	17
5. Hotels.com	5.64	14
6. Travelocity	5.86	14
7. Orbitz	6.21	14
8. Trip Advisor	6.38	8
9. Priceline	6.54	13
10. Hotwire	7.40	10
11. Kayak	9.33	6
12. Airline website	9.50	4
13. Travel Zoo	10.00	5
Other – Booking.com	4.00	2
Other – Travel Web	5.00	1

Leisure Feeder Markets	2014	2009
Raleigh -Durham-Chapel Hill	8	8
Charlotte-Gastonia-Rock Hill	8	5
Atlanta	5	5
Greensboro-Winston Salem-High Point	5	8
Greenville	4	--
Florida	2	3
Ohio	2	--



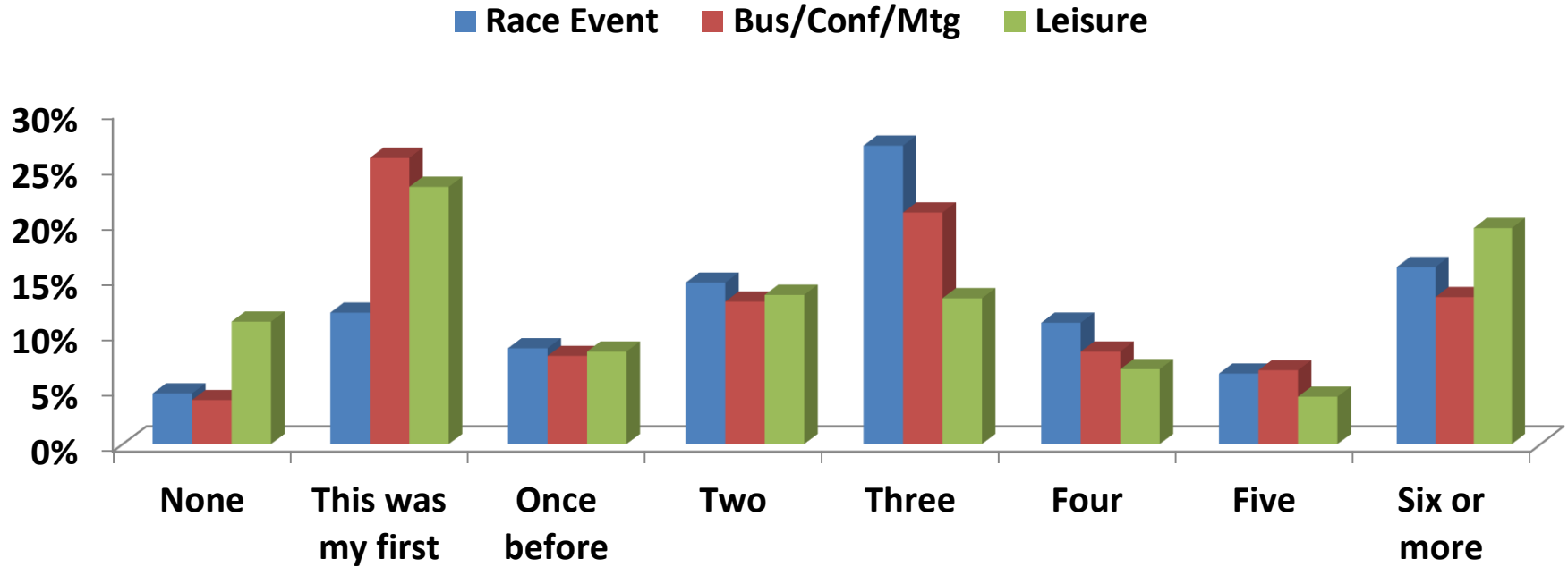
Cabarrus County Visitor Profile

Race Event n=219

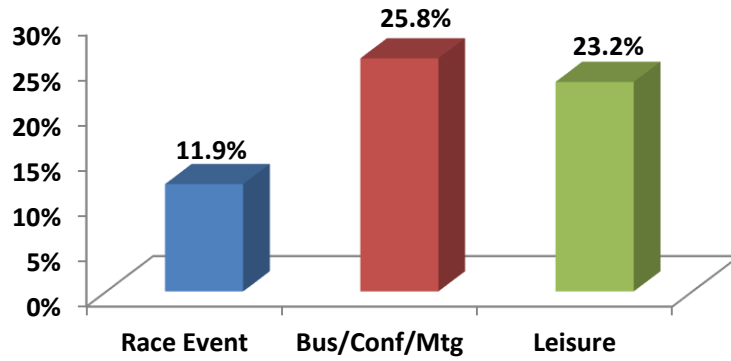
Business/ Conference/ Meeting n=227

Leisure (visited area site-seeing, wedding, reunion, festival,
event, etc.) n=373

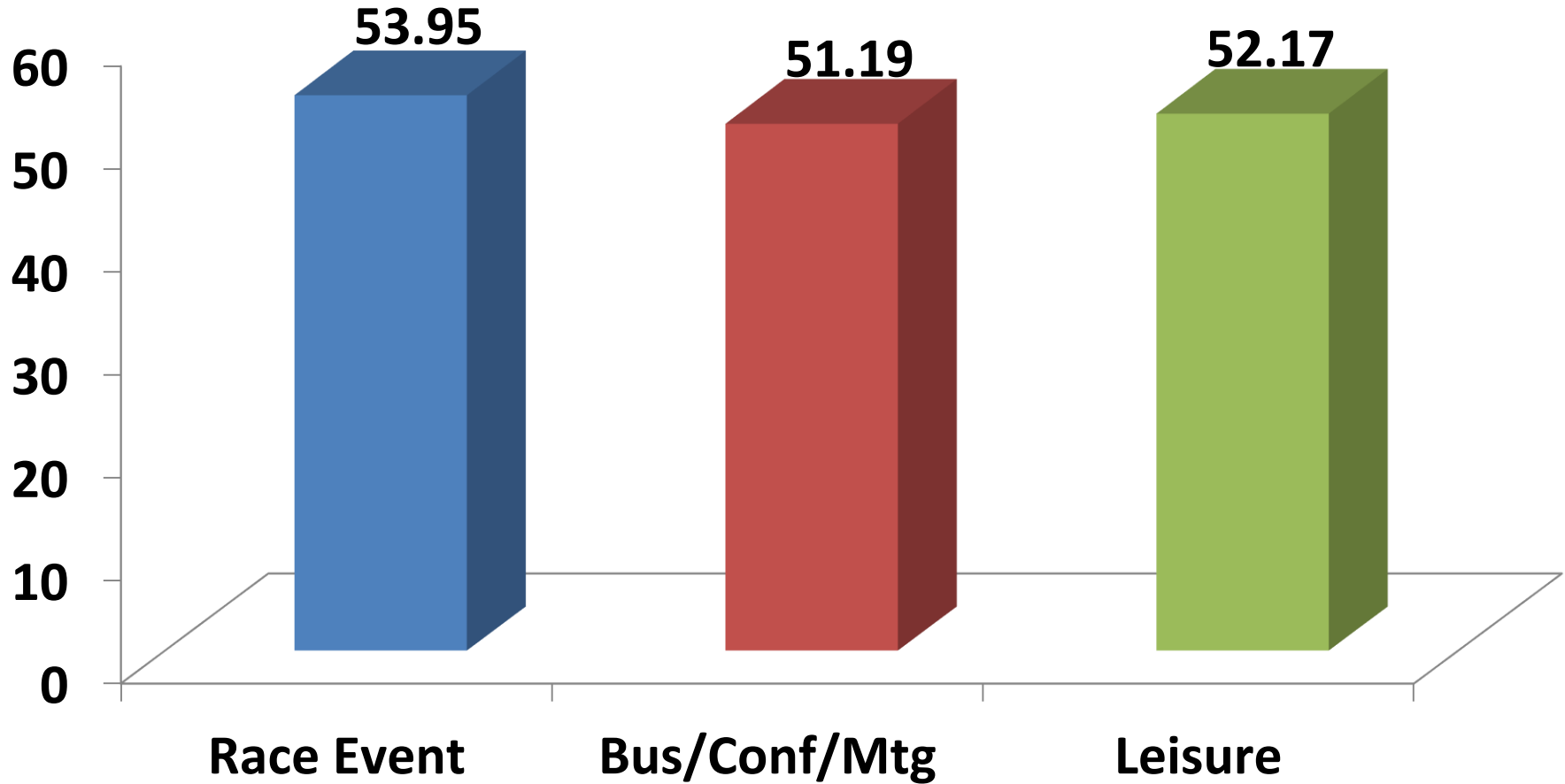
How many times have you visited Cabarrus County in the last three years?



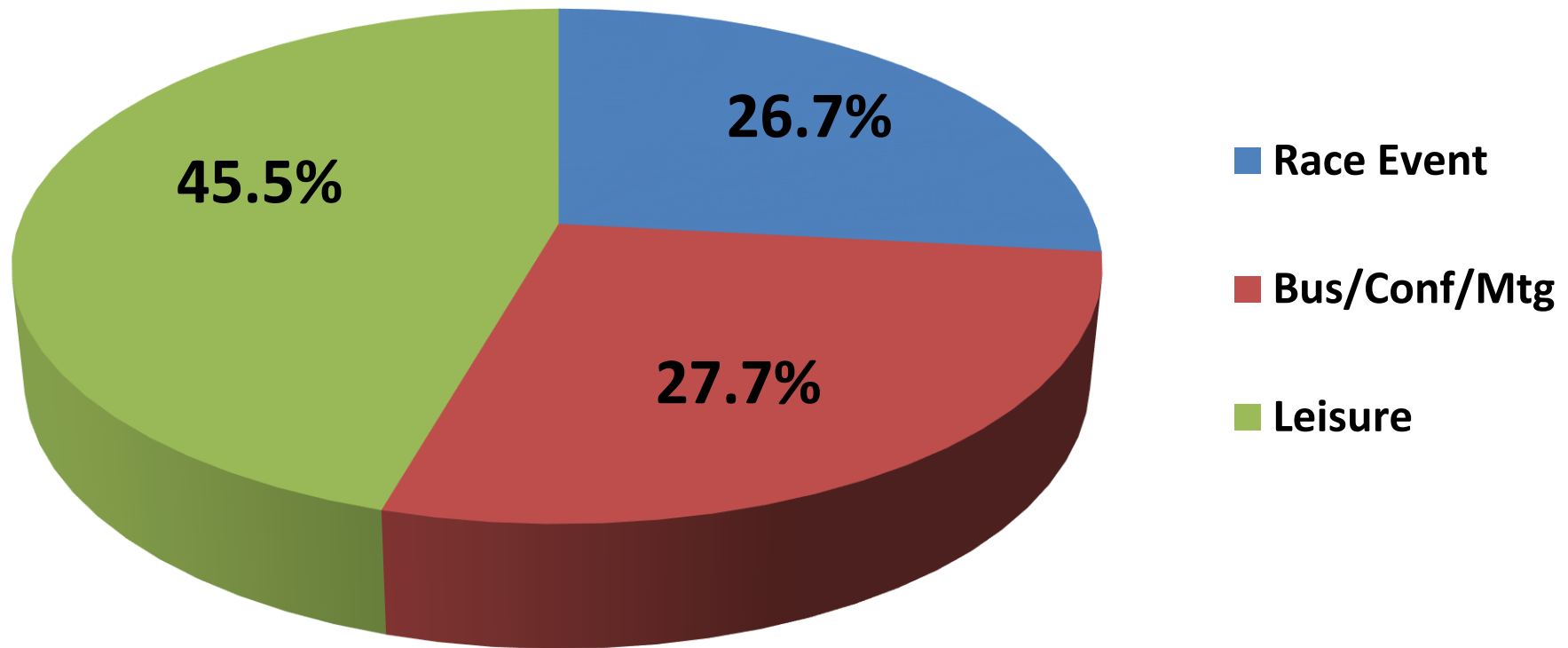
This was my first visit



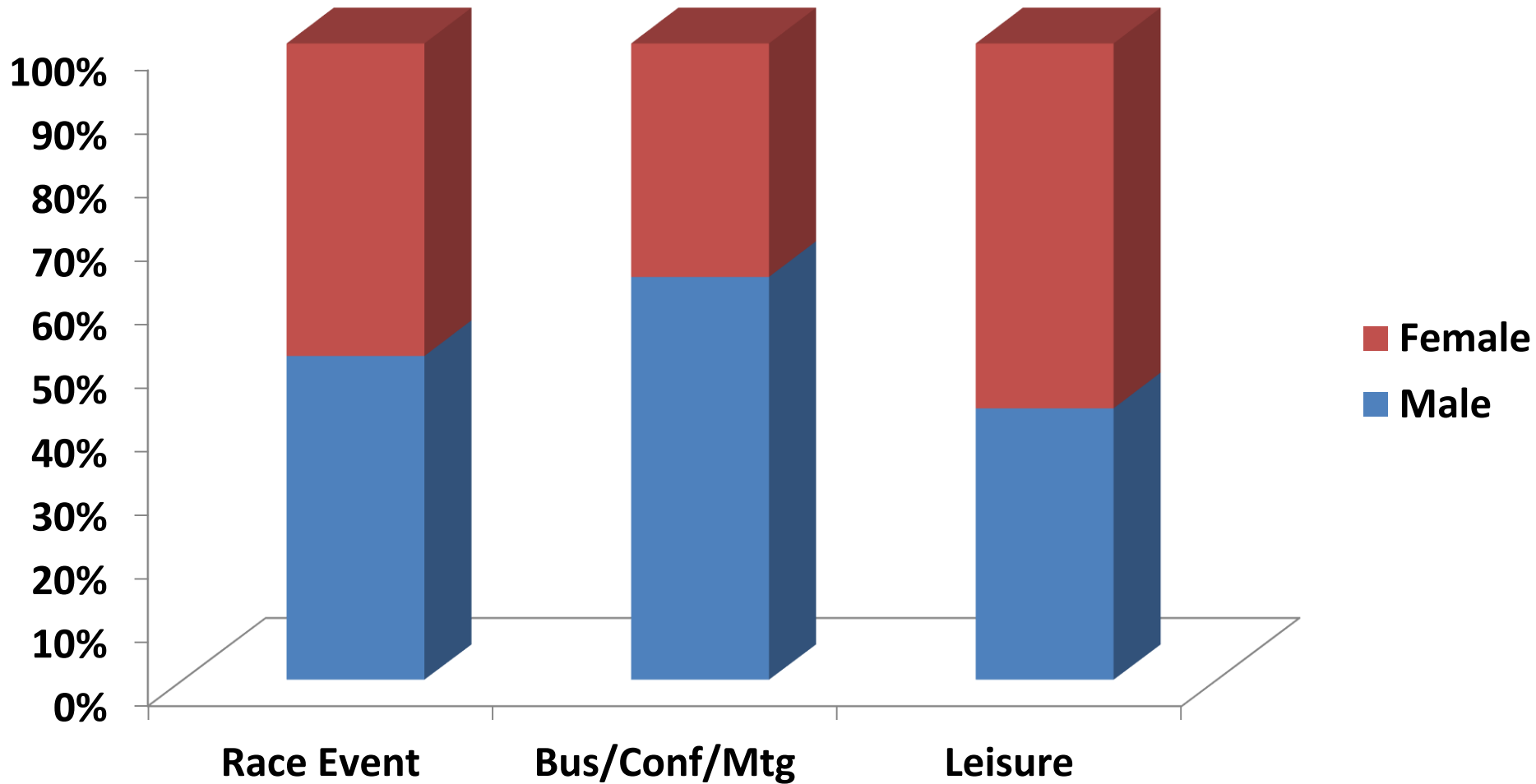
Average Age of Respondents



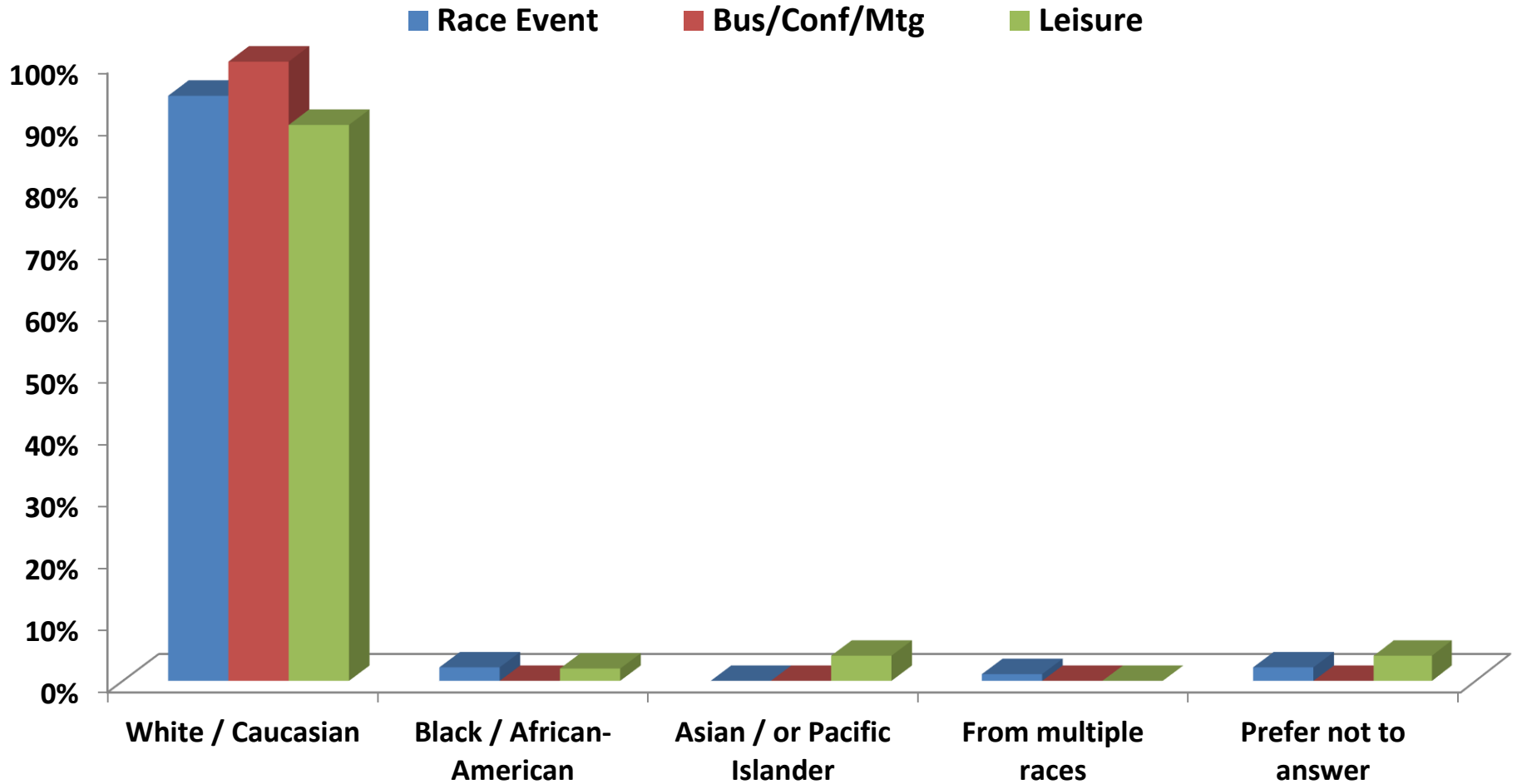
What was the MAIN purpose for your most recent trip to Cabarrus County?



Gender of Respondents

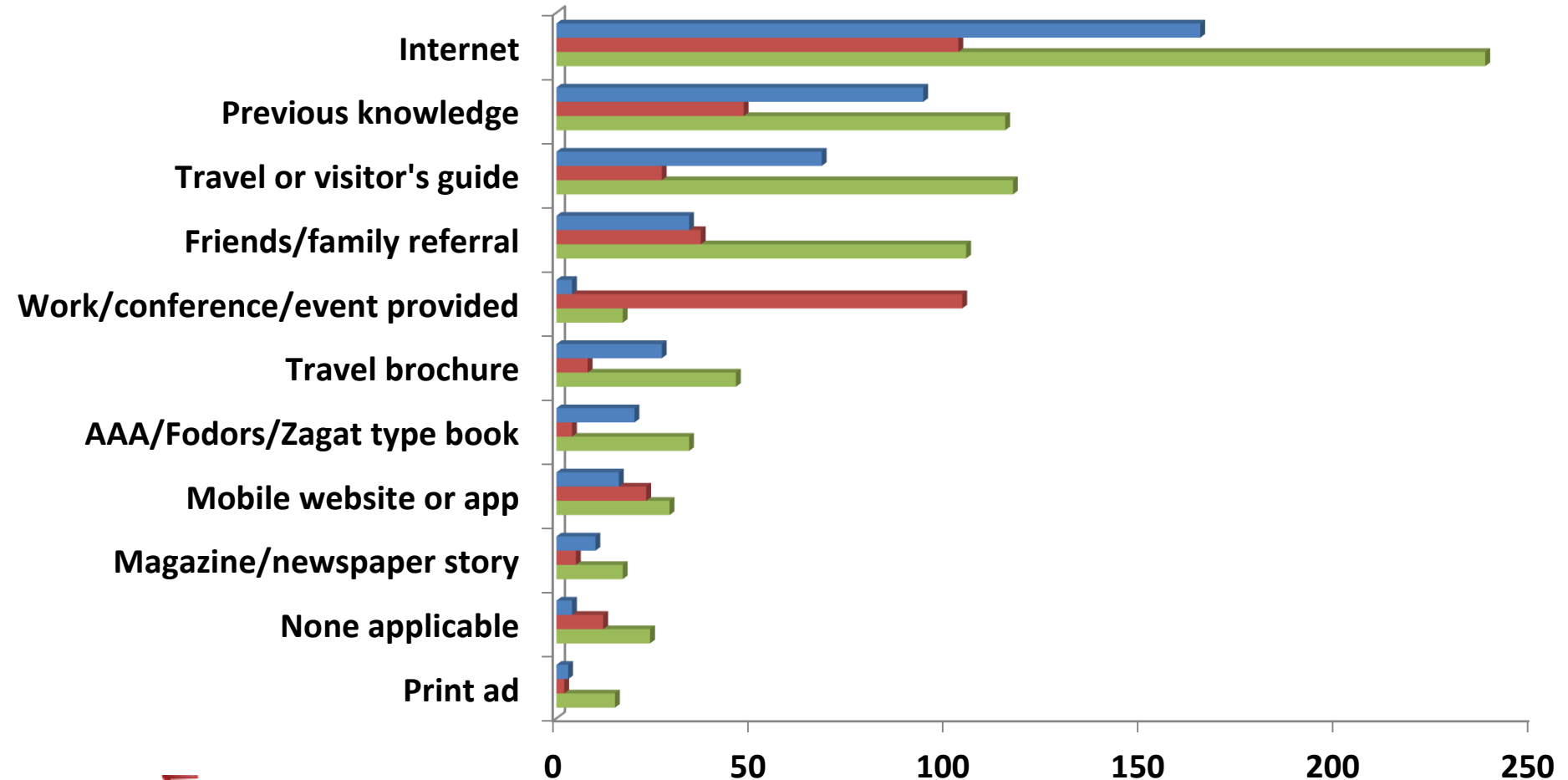


Ethnicity by category

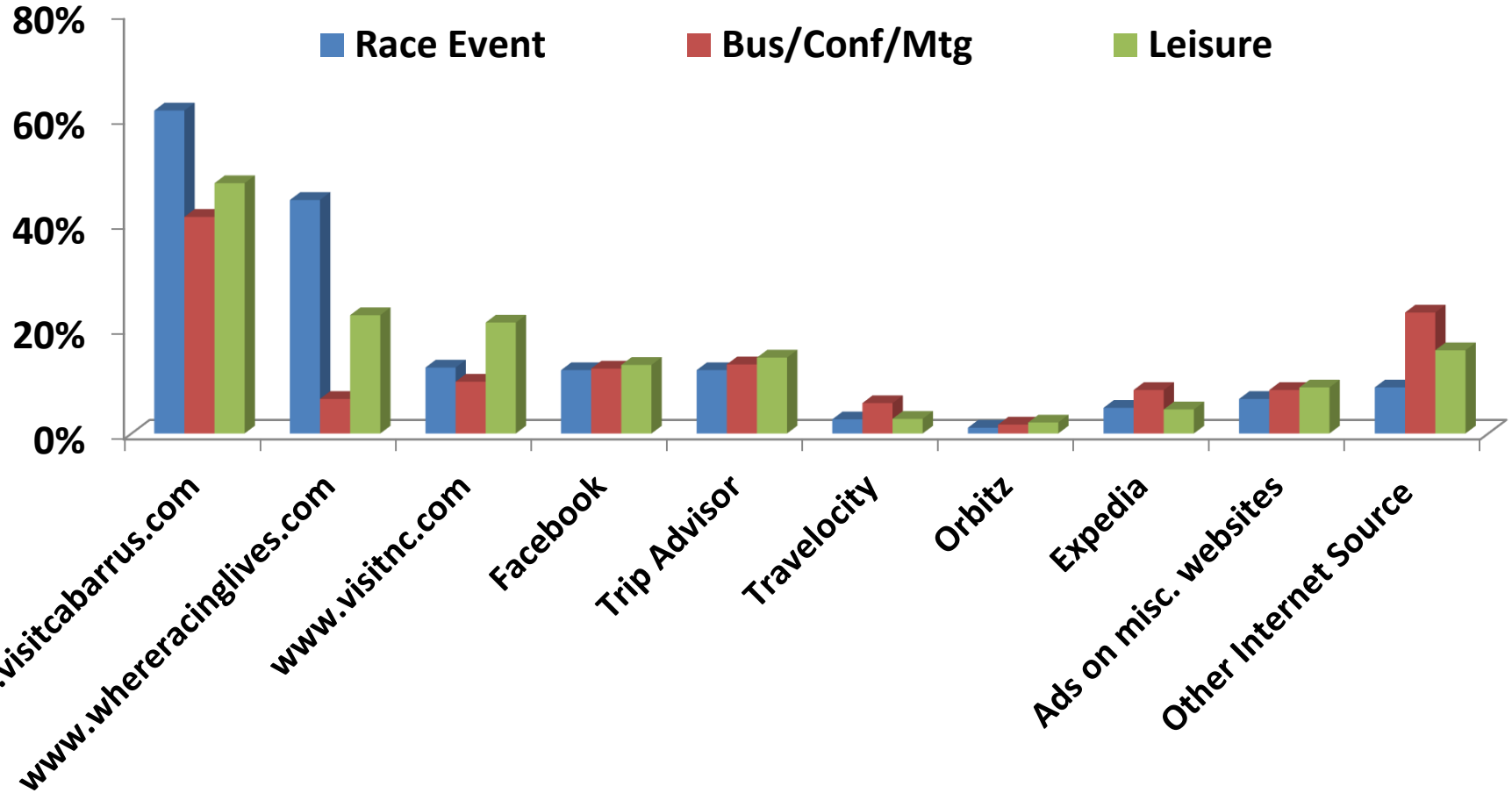


What information or trip planning sources did you use to plan your most recent trip to Cabarrus County?

■ Race Event ■ Bus/Conf/Mtg ■ Leisure



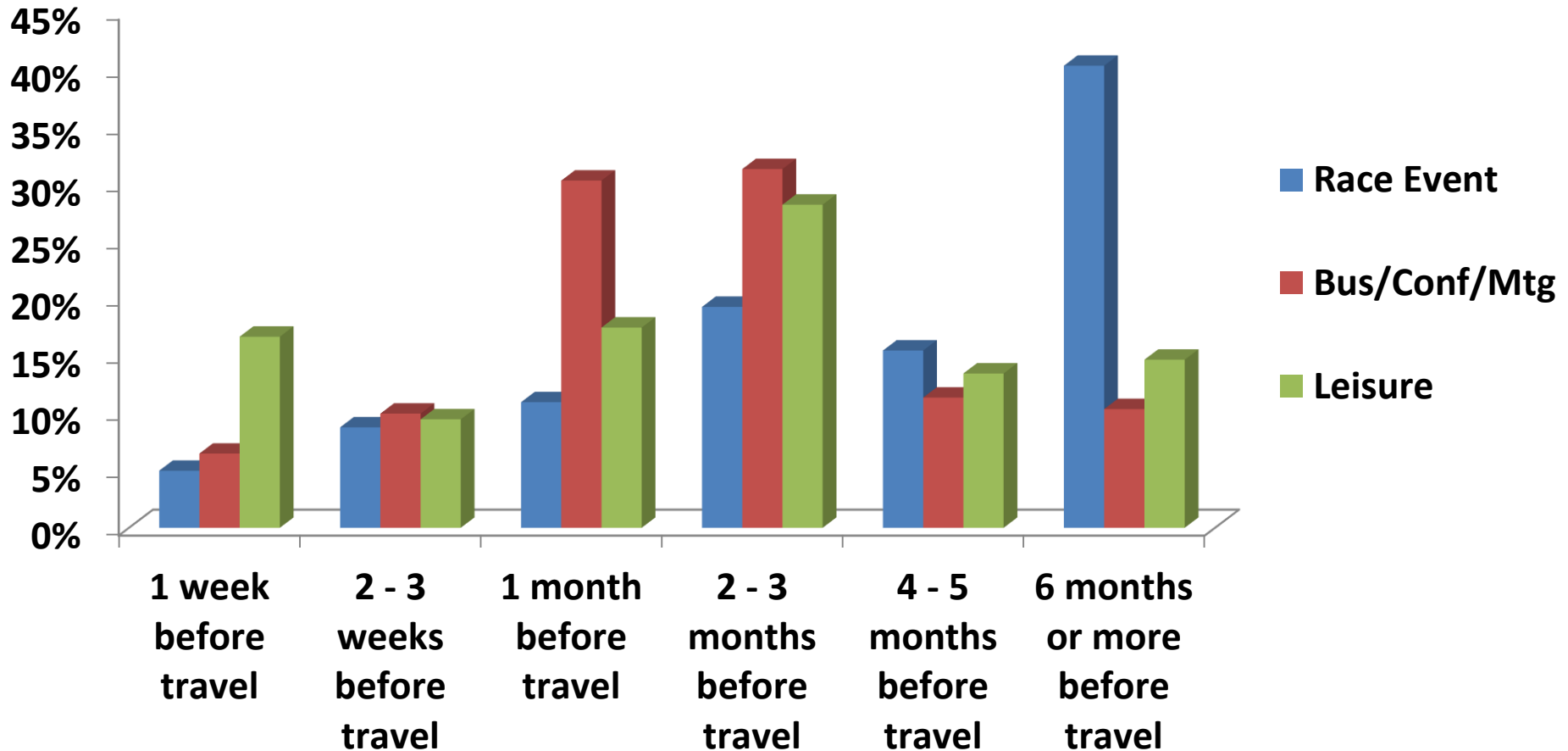
If you found Cabarrus County tourism information from an INTERNET SOURCE, please indicate which ones.



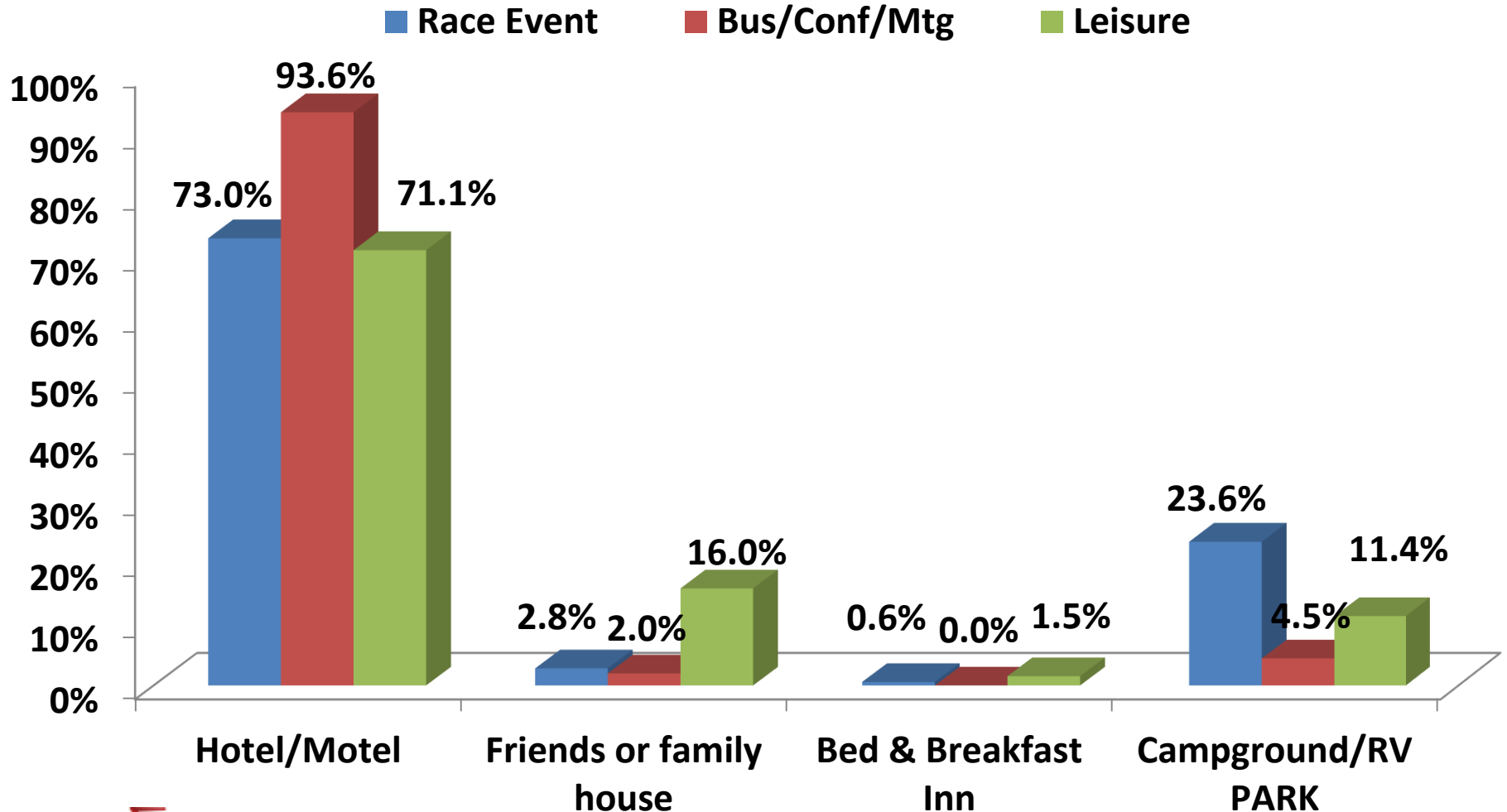
What inspired you to go to www.visitcabarrus.com or www.whereracinglives.com?

Answer Options	Race Events	Bus/Conf/Mtg	Leisure
Race track - Charlotte Motor Speedway	83.7%	16.1%	56.0%
Previous knowledge	25.5%	12.1%	16.5%
Google or online search	25.0%	15.4%	23.9%
Travel or Visitor's Guide	15.2%	1.3%	22.6%
Travel brochure	9.8%	2.7%	16.0%
Friends/family referral	6.0%	6.7%	19.3%
Facebook	5.4%	2.7%	5.8%
Package/Coupons/Special Deal	4.3%	2.7%	5.3%
Magazine/newspaper story	3.8%	0.0%	2.9%
Work/conference/event provided	2.7%	50.3%	4.1%
Electronic newsletter	2.7%	0.0%	1.6%
None Applicable	2.2%	25.5%	11.5%
Other internet source	1.6%	1.3%	2.5%
Print Ad	1.1%	0.0%	2.9%
Twitter	0.5%	0.7%	0.8%
Blogs	0.0%	1.3%	0.8%
YouTube	0.0%	0.0%	0.0%
QR Codes	0.0%	0.0%	0.8%

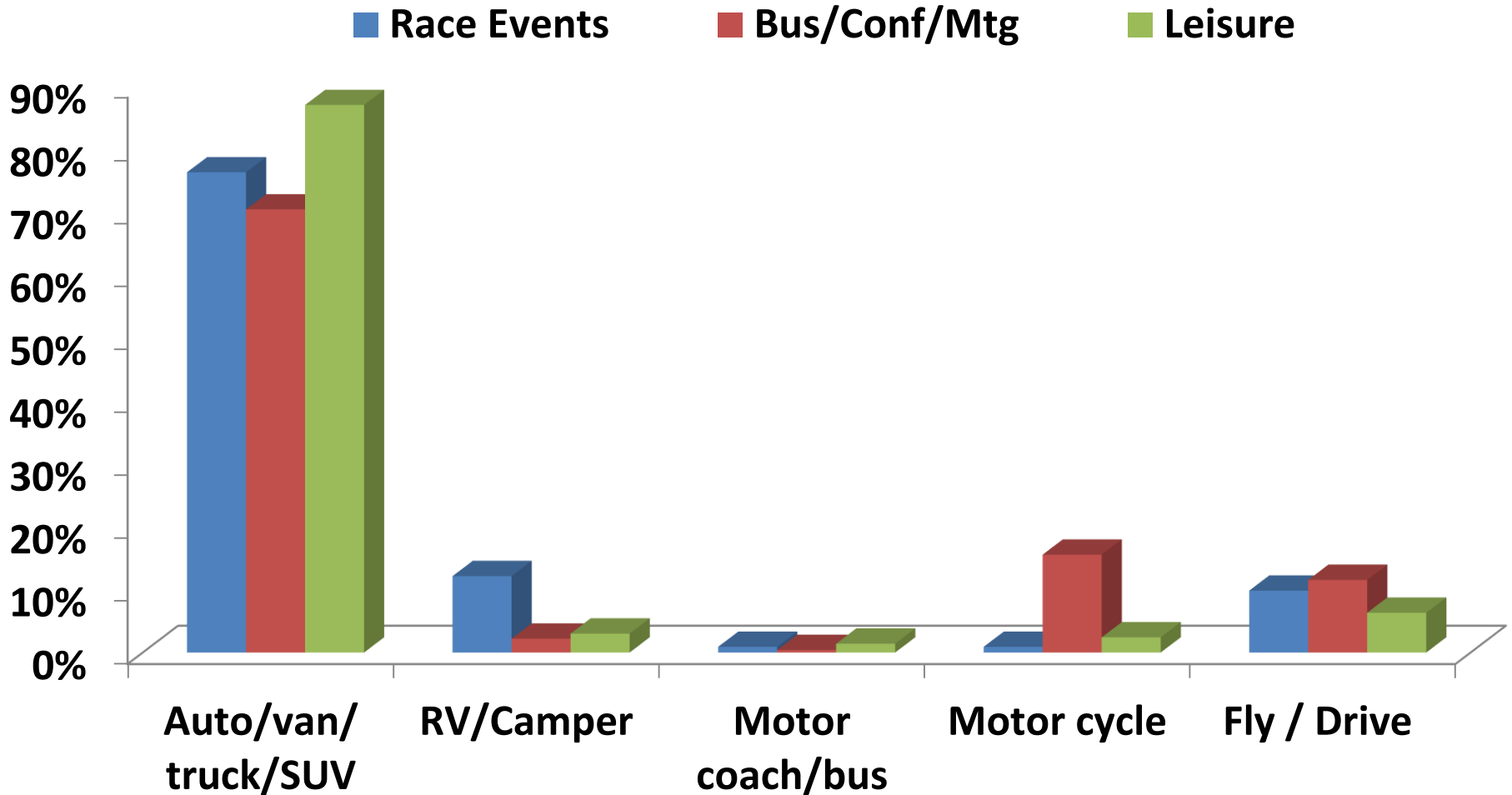
How far in advance did you book your accommodations for your most recent trip?



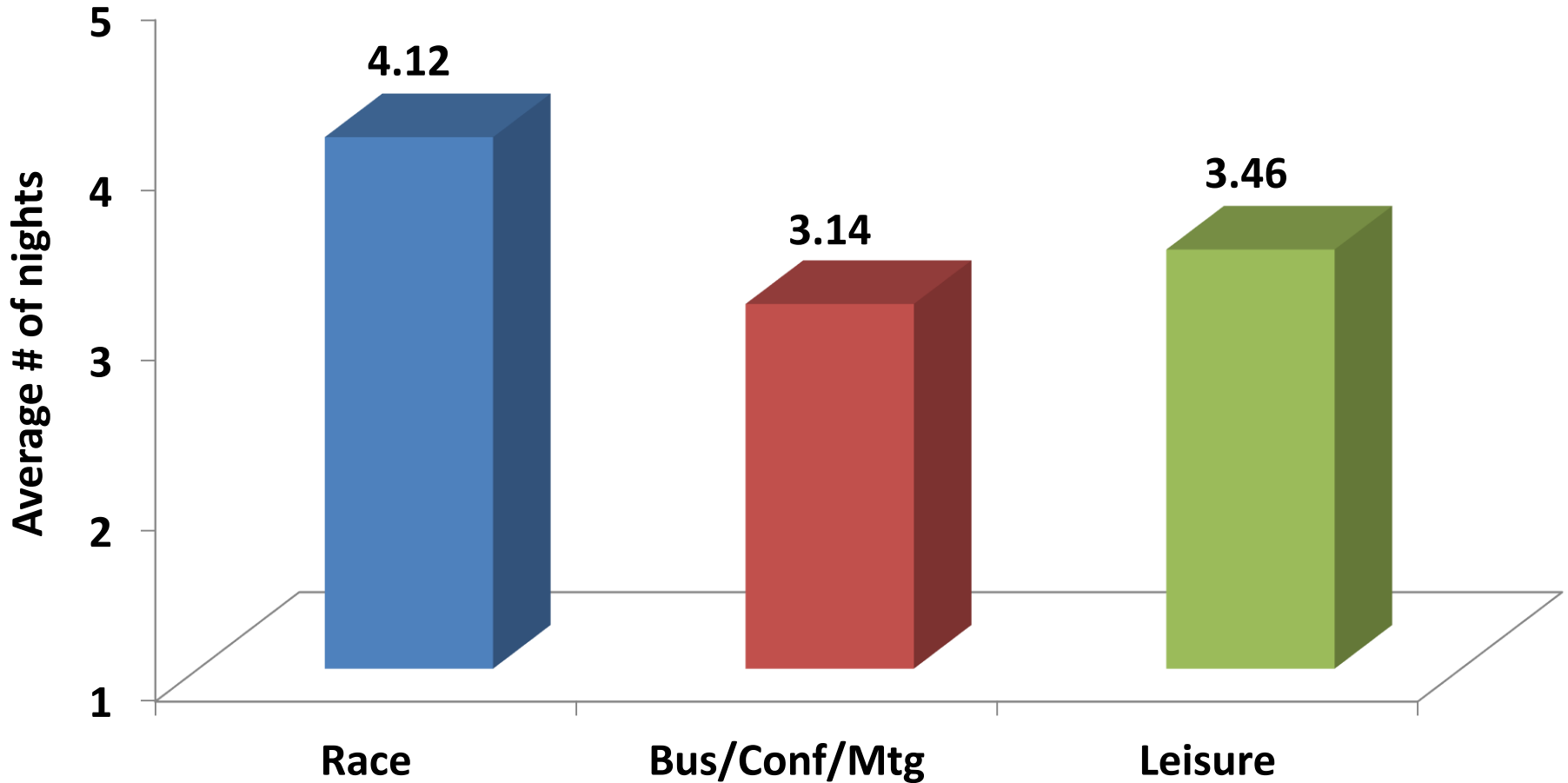
Where did you stay during your last visit to Cabarrus County?



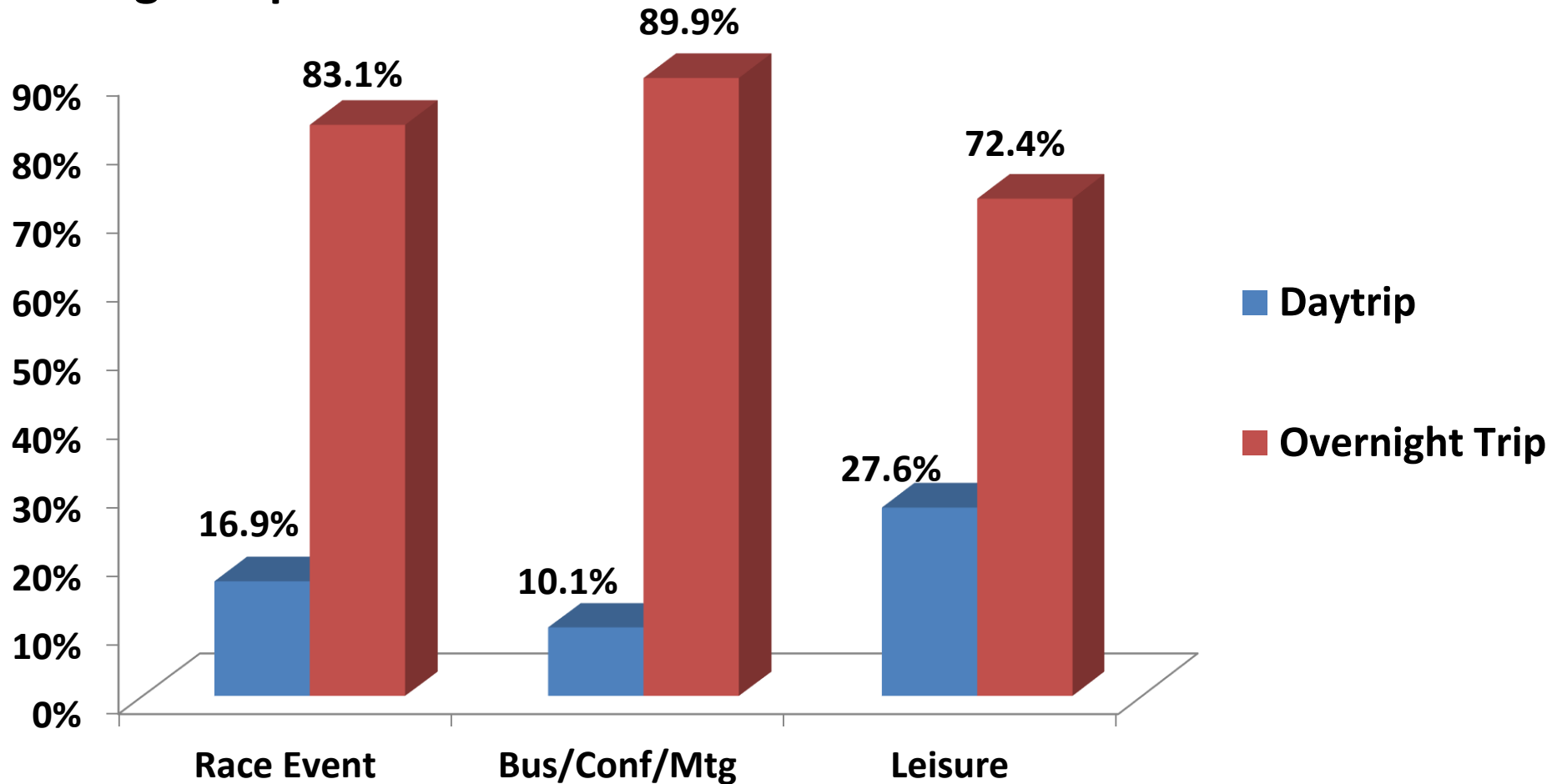
What mode of transportation did you use to get to and around Cabarrus County?



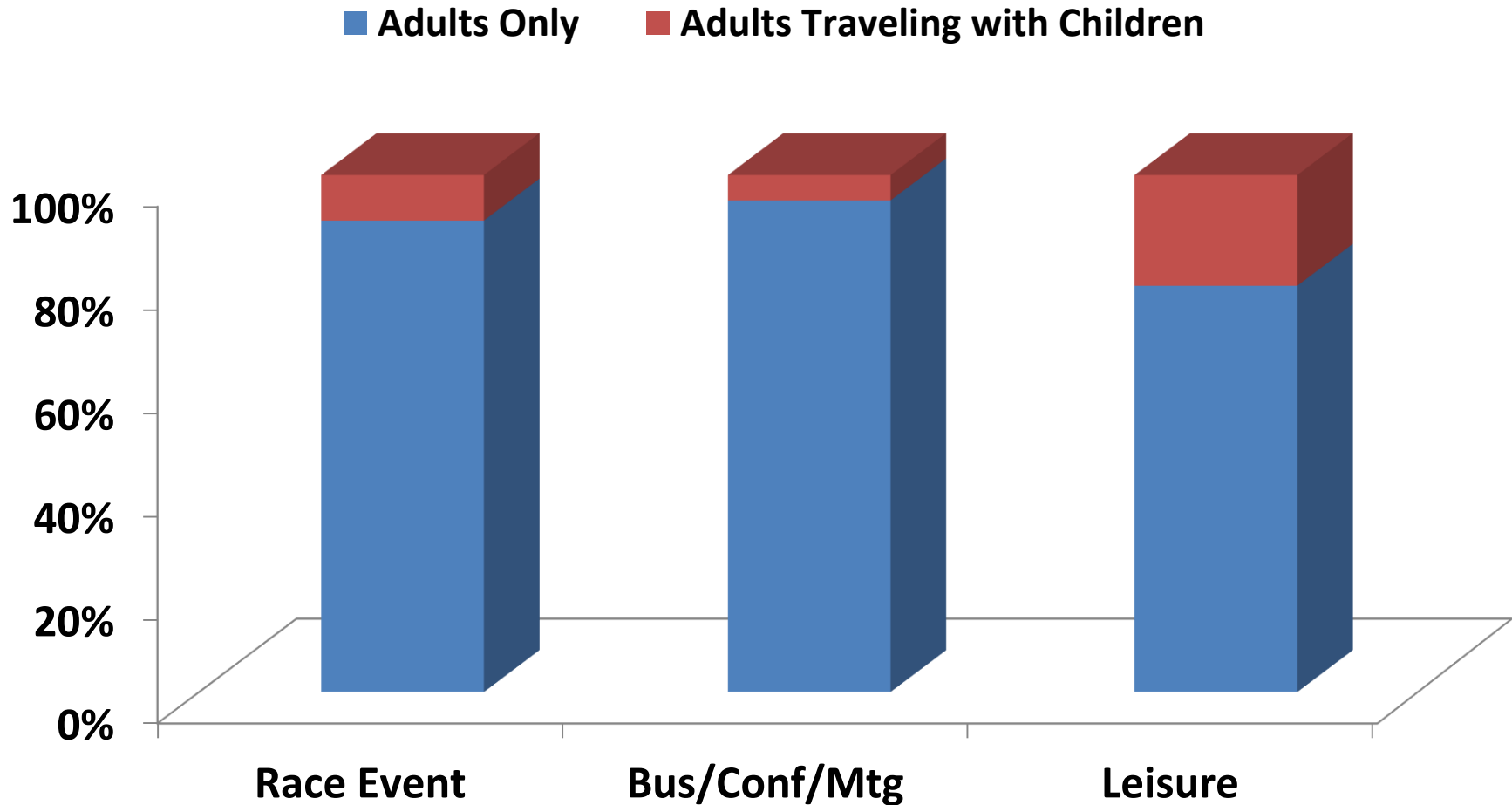
How many night did you stay on your recent trip?



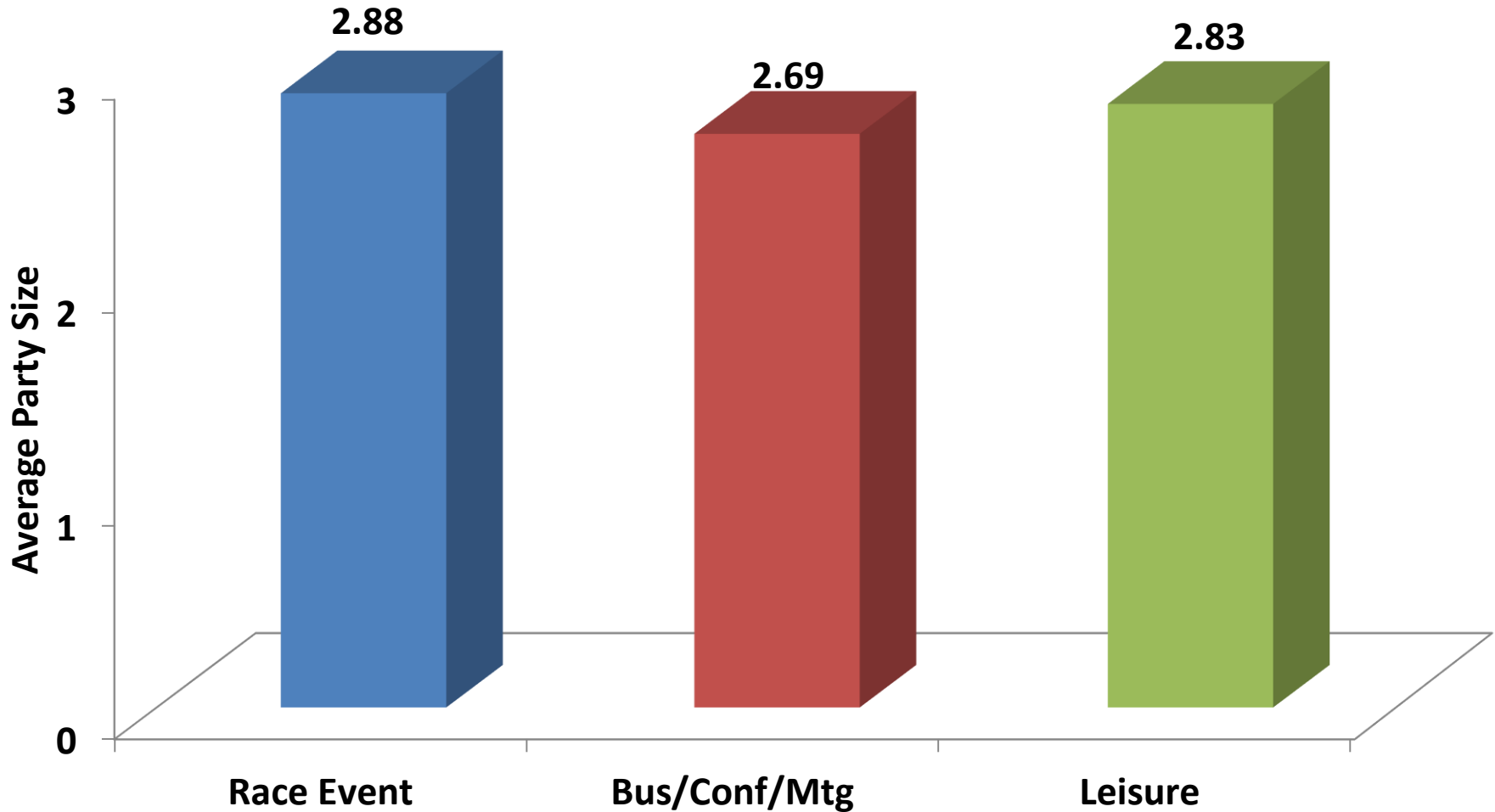
Was your most recent trip to Cabarrus County a day trip only or an overnight trip?



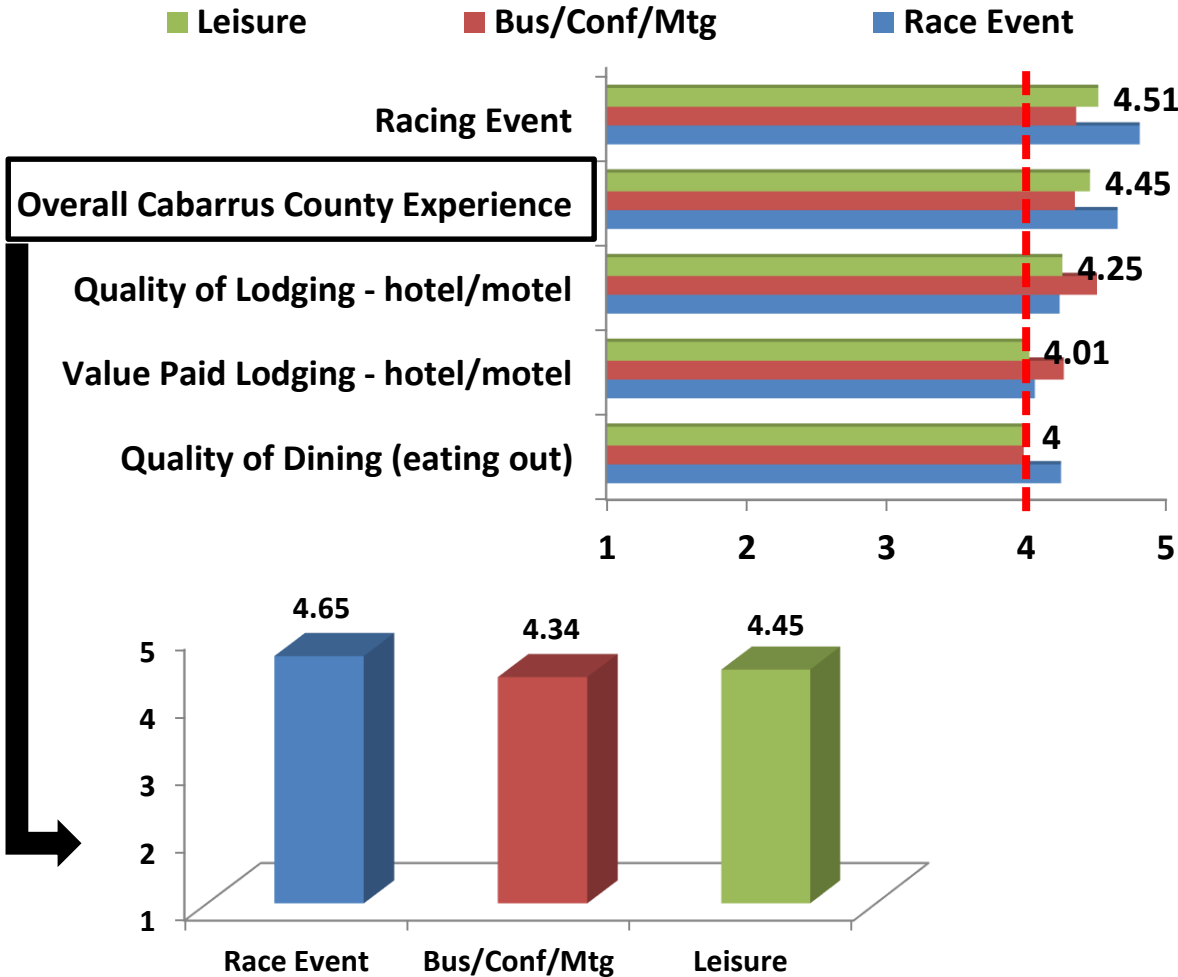
Was your travel party comprised of adults only or adults traveling with children?



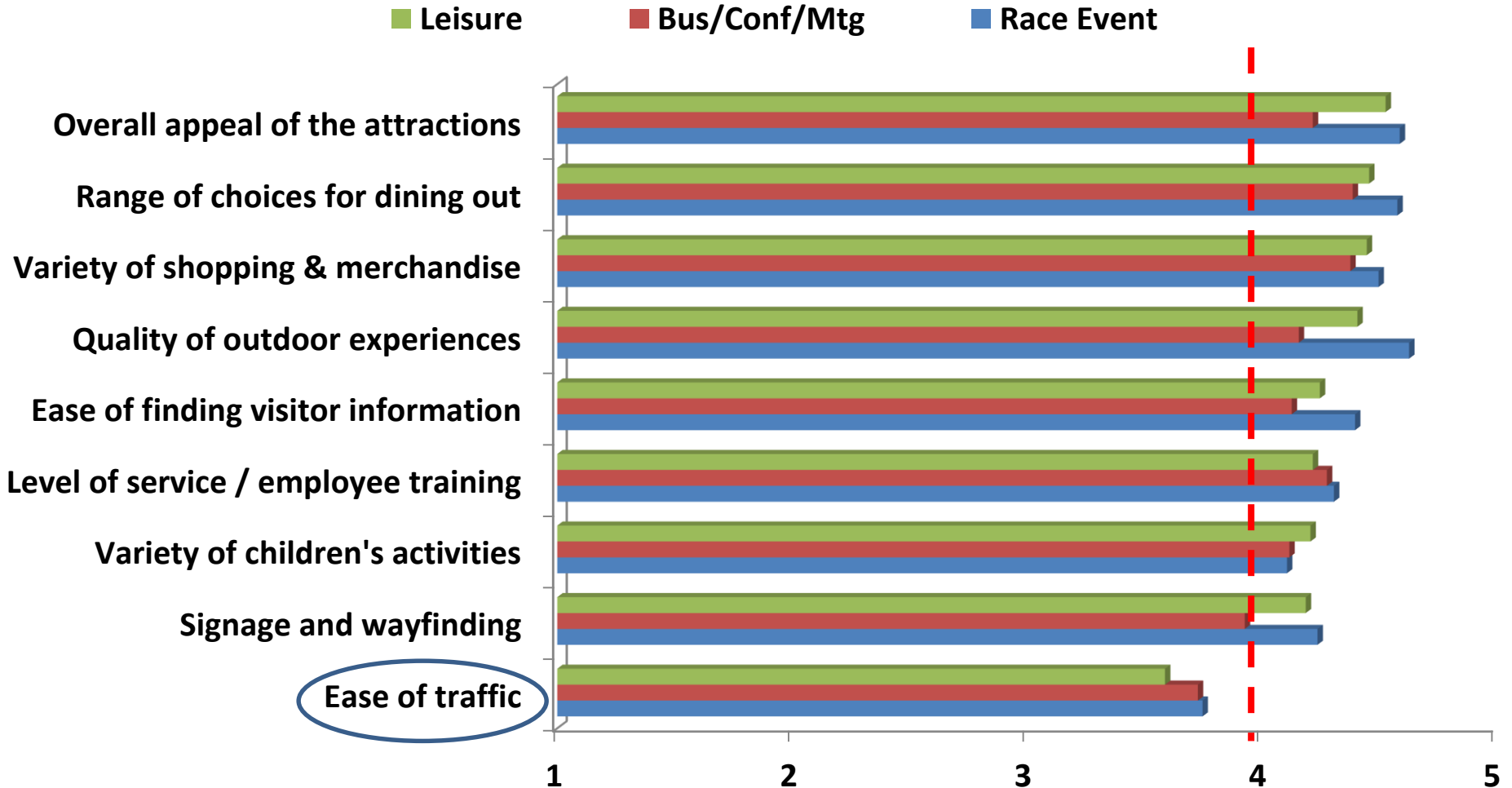
Average travel party size



Cabarrus County Visitor Satisfaction

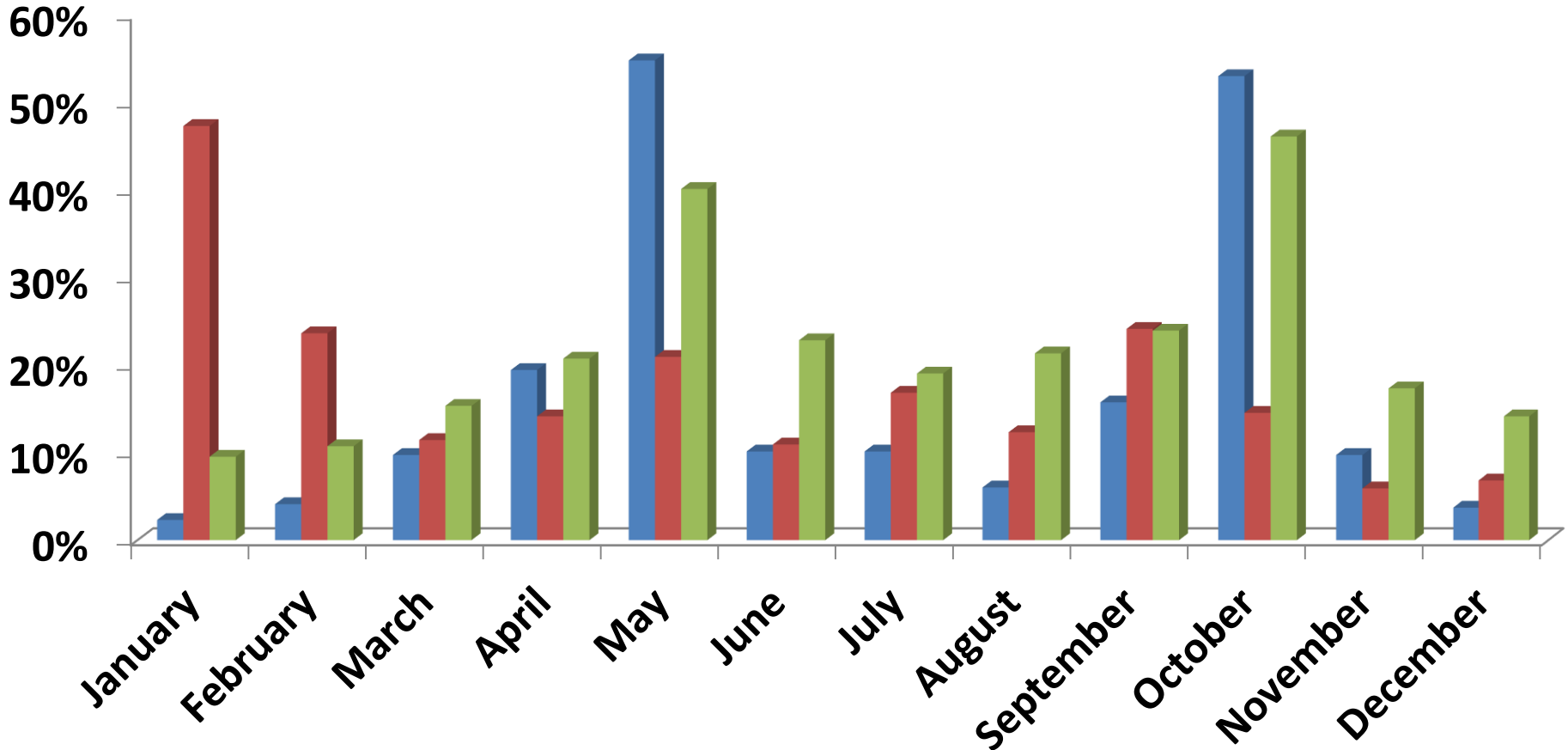


Cabarrus County Visitor Satisfaction by Category



Check all the months in which you have visited Cabarrus County.

■ Race Event ■ Bus/Conf/Mtg ■ Leisure





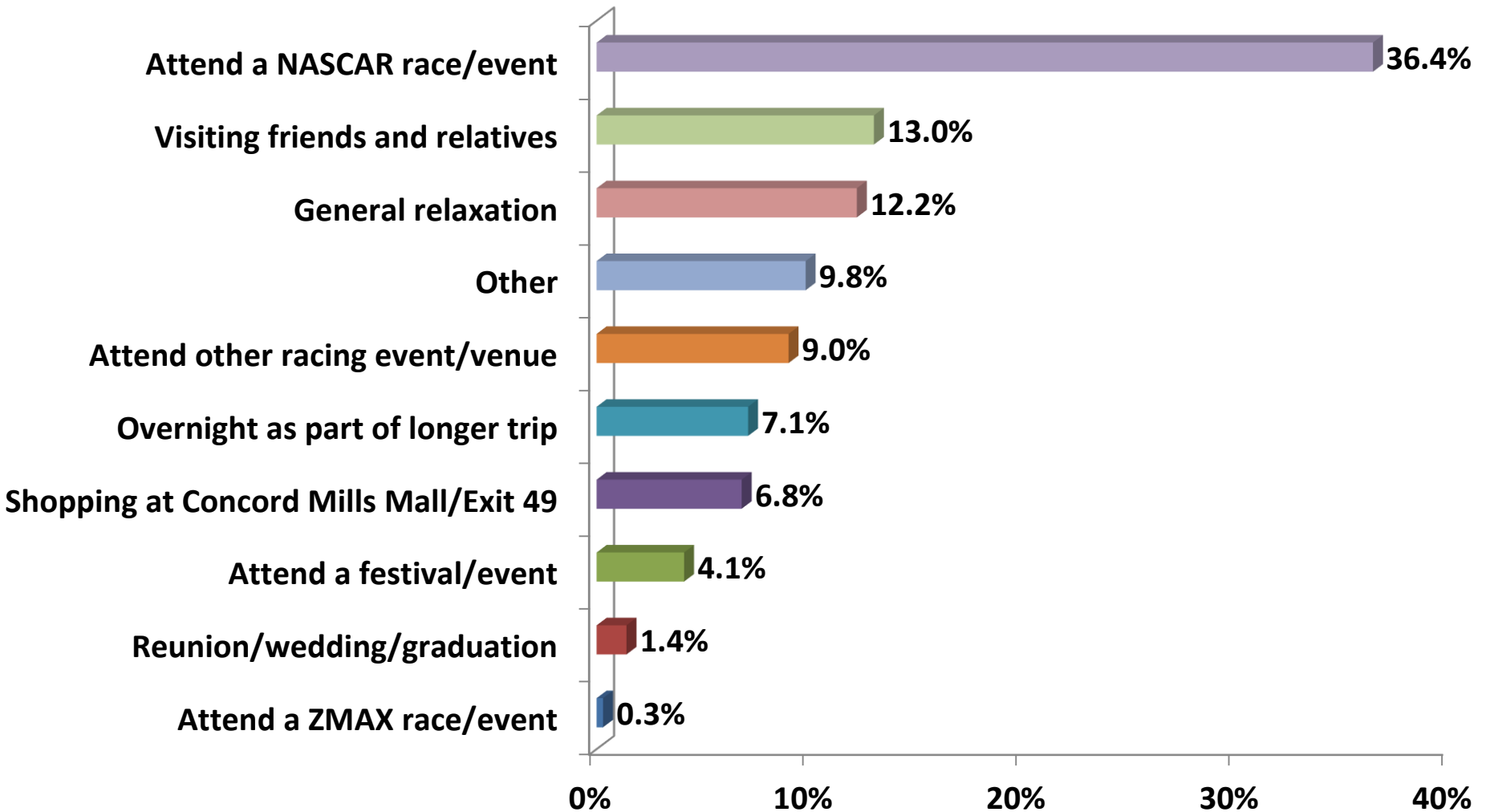
Cabarrus County Visitor Profile

Leisure

(visited area site-seeing, wedding,
reunion, festival, event, etc.)

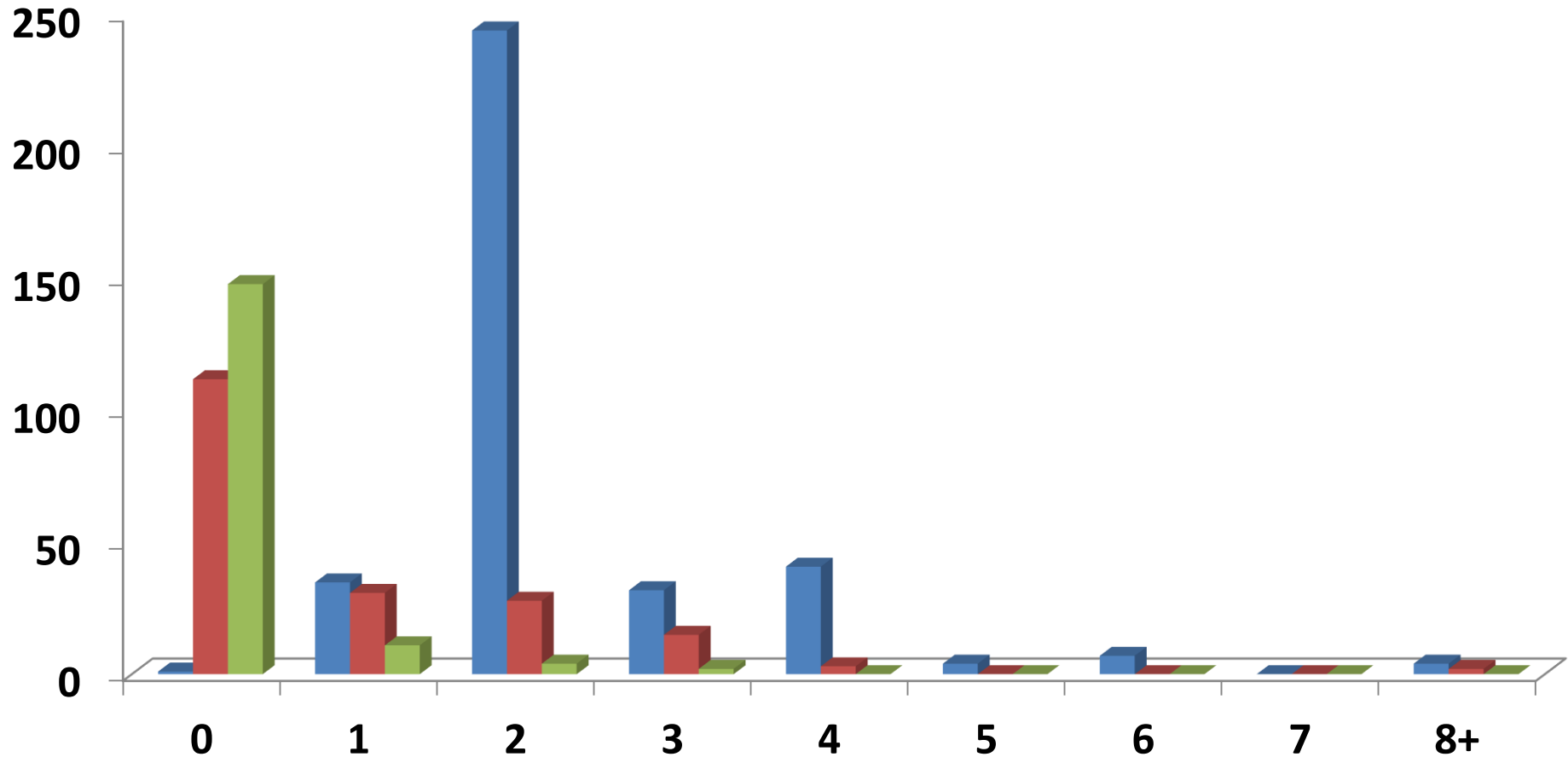
n=373

Please categorize your leisure trip to Cabarrus County. n=368



How many were in your immediate travel party? n=368

■ Adults (18 & over) ■ Children (under 18) ■ Pets



Top 5 activities leisure visitors reported participating in:

Answer Options	Response Percent
Shopping at local stores/mall	69.7%
Auto race team shop tour	44.4%
Auto racing event	42.8%
Driving/sightseeing	38.6%
Shopping at event/vendors	33.9%

Top 5 major attractions/events leisure visitors reported participating in:

Answer Options	Response Percent
Charlotte Motor Speedway	73.9%
Concord Mills Mall	61.9%
Hendrick Motorsports	41.5%
Stewart-Haas Racing	27.4%
Roush Fenway Racing	25.8%

All activities leisure visitors reported participating in:

Activities	Response Percent
Downtown Concord	29.4%
Visit a museum	23.1%
Downtown Kannapolis	19.7%
Sleep late/take a nap	14.7%
Visit a park	14.2%
Attend a festival/event	12.5%
Visit a historic site	12.2%
Other	11.9%
Attend sports event	9.7%

Activities	Response Percent
Camping	6.4%
Concert/live performance	4.4%
Motorcycle riding	2.8%
Business	2.2%
Hiking/cycling	2.2%
NC Research Campus	2.2%
Golf	1.4%
Meeting/conference/training	1.4%
Hunting/fishing	1.4%

All major attractions/events leisure visitors reported participating in:

Attractions/Events	Response Percent
Dale Earnhardt Plaza	21.7%
Earnhardt-Ganassi Racing	21.1%
Richard Petty Motorsports	18.2%
NASCAR Speedpark	14.8%
ZMax Dragway	13.2%
NASCAR Racing Experience	13.2%
Concord Speedway	12.6%
Sam Bass Gallery	11.6%
Cabarrus Arena & Events Center	8.2%
Richard Petty Driving Experience	7.2%

Attractions/Events	Response Percent
Curb Motorsports Museum	6.6%
Cabarrus Museum	5.3%
NC Music Hall of Fame	5.3%
Reed Gold Mine	4.1%
Verizon Wireless Amphitheatre	3.1%
US Legends Car International	3.1%
Rocky River Vineyards	2.5%
Art Council Gallery & Davis Theatre	1.3%
Carolina Courts	0.6%

New Activities and experiences that would appeal to Leisure visitors

Answer Options	Response Percent
Outdoor drive-in movie theatre	39.1%
Concerts - country/western	30.8%
Concerts - contemporary/pop/rock	27.3%
More nighttime entertainment	25.3%
Upscale finer dining/chop house	17.8%
Arts and antique district	17.4%
Unique boutique shopping	17.4%
Live theater series (musicals & plays)	15.4%
Downtown Concord upscale unique hotel	13.0%
Upscale RV park resort	11.5%
Concerts - classical	8.3%
Other (please specify)	7.9%
Horse racing event center	7.1%

Cabarrus County Visitor Profile - Leisure

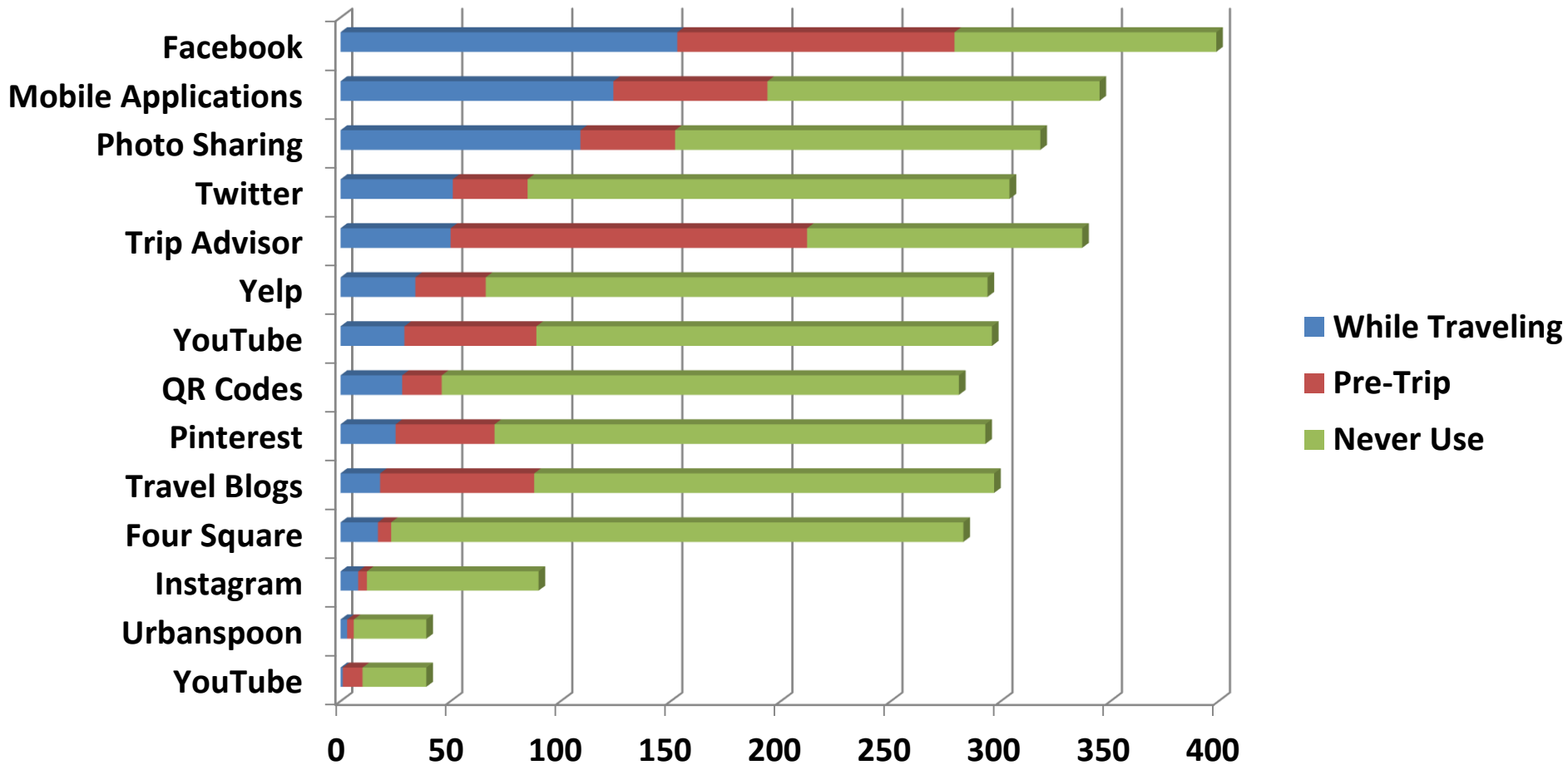
How much did you pay for your lodging/accommodations WHILE IN Cabarrus County?

Answer Options	Overnight Average	Daytrip Average
Lodging:	\$364.67	\$0.00

How much did your party spend WHILE IN Cabarrus County?

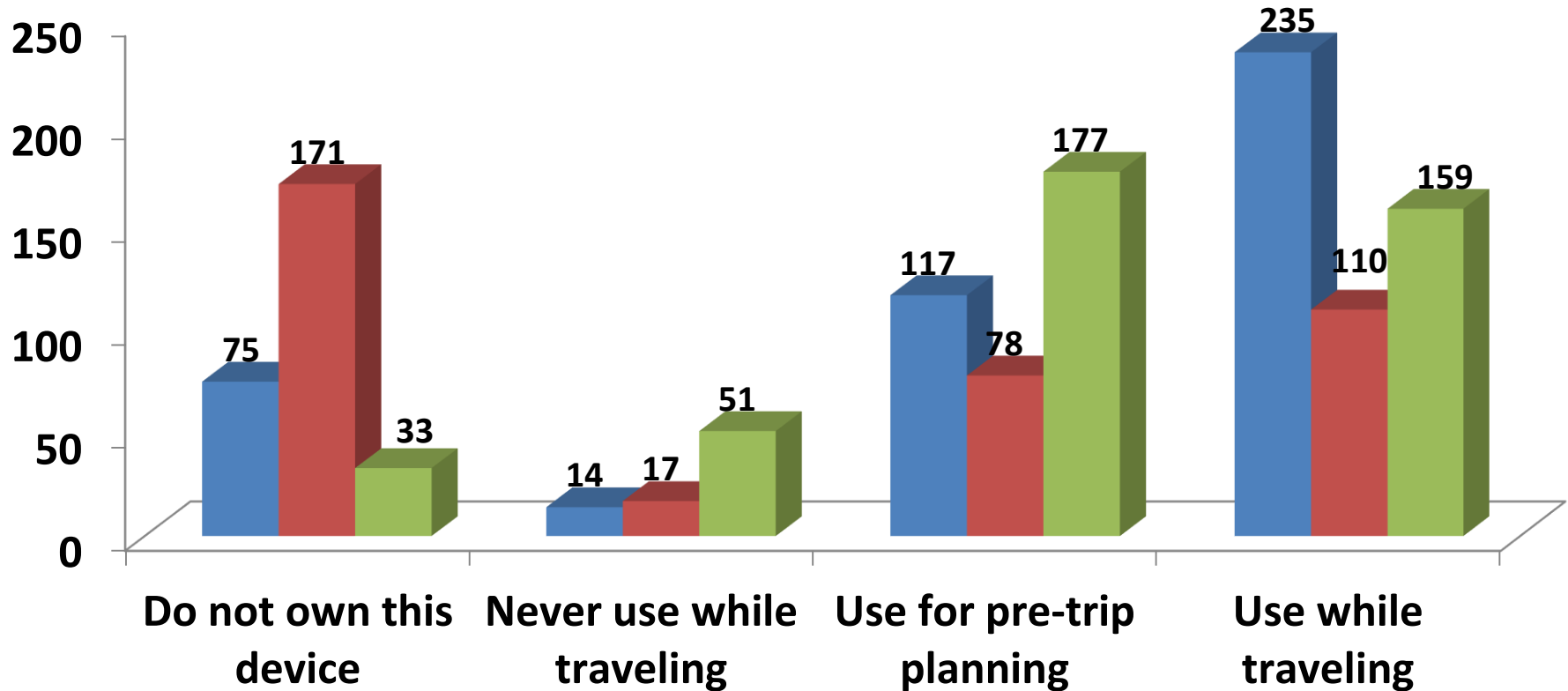
Answer Options	Overnight Average	Daytrip Average
Food/meals:	\$216.84	\$79.25
Attractions/events:	\$276.71	\$159.85
Shopping:	\$292.75	\$174.84
Auto Fuel	\$139.48	\$62.10

When do you use the following social media sites or applications as part of your travel? n=331

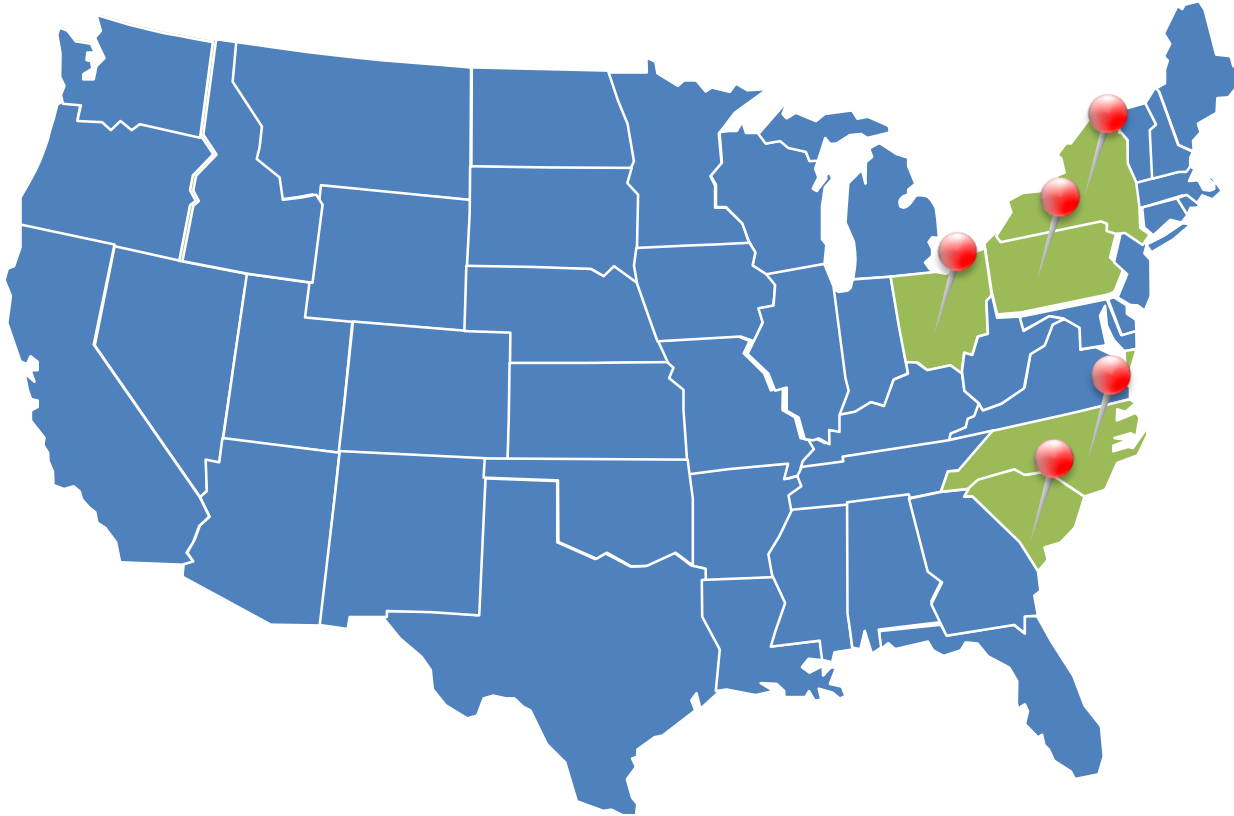


How do you use the following mobile devices related to your travel(s)? n=335

■ Smartphone ■ iPad or electronic tablet ■ Laptop computer



Top 5 Points of Origin – Leisure Visitors



1 – North Carolina - 26%

2 – Pennsylvania - 10%

3 – South Carolina - 9%

4 – Ohio - 6%

5 – New York - 5%

Points of Origin – Leisure Visitors



Please state the name of any website, print publication, television advertisement, radio station, etc. where you found information regarding visiting Cabarrus County

- Google (6)
- AAA Book (5)
- Cabarrus County website (4)
- Charlotte Motor Speedway (3)
- AARP (2)
- Cabarrus County (2)
- Cabarrus County visitor guide (2)
- Our state magazine (2)
- Visitcabarrus.com (2)
- Visitnc.com (2)
- Ask.com
- Bing
- Cabarrus County info guide
- Charlotte motor speedway light show website
- Charlotte raceway
- Charlotte thing to do
- CMS
- Concordnc.gov/visitor
- Convention & visitor's bureau
- Don't remember
- Facebook
- <https://www.cabarruscounty.us/>
- Multiple Nascar fan sites
- Nascar.com
- NC travel guide
- NC travel website
- NTI
- Richard Childress racing
- Travel channel
- Trip advisor
- Visit Cabarrus county
- Visitors guide
- Website for concord mills

If you found Cabarrus County tourism information from an INTERNET SOURCE, please indicate which ones.

- Great Wolf Lodge (6)
- Nascar.com (5)
- Google (4)
- Bing (2)
- Charlotte Motor Speedway (2)
- Google search (2)
- Nascar (2)
- Yahoo (2)
- Charlotte motor speedway web site
- Choice hotels
- Friend
- Groupon
- Hotel advertisement
- Hotels.com
- I grew up in rowan county
- Living social
- Mustang club of America
- Nascar hall of fame
- NC tourism
- Our state
- Specific travel places to visit
- Speedway website
- Twitter, laidbackracing.com
- Www.gwrranc.org
- Www.thereandbackagain.com



What inspired you to go to www.visitcabarrus.com or www.whereracinglives.com?

- Am originally from NC
- Automotive , car & driver / automobile
- Complete survey
- Great wolf lodge
- Have previously been to visitor's center on D. Earnhardt Blvd.
- Nascar shops
- NTI
- Richard petty driving experience
- Ticketmaster.com - bought tickets for concert at the Filmore
- Used to live there
- Visit NASCAR race shop and attractions.
- Wanted to revisit the Nascar hall of fame
- We went to great wolf lodge
- Www.gwrranc.org

How can we improve or add to your visitor experience in Cabarrus County?

Top 5:

1. Better directions/signage
2. Lower prices/offer discounts
3. Add more activities/shopping

- Add more Children attractions
- Advertise more in cities such as Raleigh, Winston-Salem
- All good
- At airport n gas stations
- Beautify the retention pond at Concord Mills
- Better directions to Cabarrus Arena from highways.
- Better directions to Cabarrus Arena from hotels
- Better entrance ramp signage to I-85 near concord mills
- Better info/directions to the race team garages
- Better overall customer services
- Better prices for dining
- Better sales
- Better signage for Great Wolf Lodge
- Better signage to race shop locations
- Better signage uptown
- Better signage/directions
- Better signs
- Better signage
- Better traffic flow
- Bring back Uno's
- Cannot list anything at this time

- Cheaper lodging
- Cheaper prices
- Children shops
- Complete all of the road construction
- Complete all of the road construction
- Cops wait too long to let people cross street during race
- DE Plaza should be open more often
- Discounts
- Do something about traffic.
- Don't know (4)
- Don't know. Too many chains destroy any charm that might exist. Not sure if
- Don't raise the prices so much when there is a Nascar event
- Easier airport access would be nice.
- Everything was fine
- Everyone very warm and friendly
- Everything was fine, no need to add
- Everything was good
- Everything was great!
- Everything was perfect
- Everything was wonderful
- Everything we encountered was great
- Everything worked fine the way it was.
- Extra non-racing attractions
- Find ways to let folks know what's there to do
- Finish construction :)

How can we improve or add to your visitor experience in Cabarrus County?

- Finish I-485
- Finish road construction
- Finish roadwork
- Finish street repairs
- Fix roads around convention center
- Flyover at races
- Focus on dining
- Friendlier people
- Give them a reason to get off of 85
- Good in general
- Had a great experienced
- Have more signage for local businesses, not just chains
- Have Nascar drivers make more appearances for autographs
- Have some day long race visit packages
- Have some maps of the attractions in the area
- Have the Great Wolf Lodge promote your county
- Historical values
- Hotel discounts for ticket holders
- Hotels closer to Cabarrus arena & event center
- I can't think of any at this time.
- I didn't even know I was IN Cabarrus County
- I like it
- Improve the attitude of locals to "northerners"
- In the visitors guides have GPS addresses
- Information Kiosk at hotel didn't always work.
- Information on the visit Cabarrus site was incorrect.
- It was an amazing experience, I even won best decorated camper in the infield
- Keep lodging rates as low as possible
- Keep the Bars open longer
- Keep up the good work
- Lack of training from those that provide services
- Larger (more visible signs) to Cabarrus Arena
- Larger variety of restaurants
- Less cost for tickets
- Less expensive lodging
- Lessen the time it takes to leave CMS after a race
- Longer hours open
- Love Cabarrus County
- Lower food cost at track
- Mail discounts on food
- Mail discounts on shopping
- Make leaving the race track more organized.
- Make the days longer - so much to do
- Map of parks trails near CMS.
- Maps of interest
- Mark parks signage better,
- More "visit" and trip pamphlets
- More access to speedway, pits, sights
- More activities
- More coupons and discounts
- More events
- More family dining

How can we improve or add to your visitor experience in Cabarrus County?

- More farmers market, agriculture experience
- More give away at races
- More historic sites
- More hotels
- More lighted areas for leisure activities
- More maps, self-guided tours
- More motels in the area of event
- More opportunity to meet nascar drivers
- More racing shop
- More shopping
- More shopping areas
- More shopping centers
- More variety in shopping around racetrack
- Motels nearer event center
- Motorcycle event - have mapped rides available
- Nascar hall of fame was disappointing
- Need more public transportation
- Need to understand the needs of customers as individuals
- Nothing (16)
- Offer "meet & greets" with celebrities
- Outdoor movie theater
- Parking
- Pedestrian access at concord mills and surrounding area needs much, much improvement
- Prices are too high, like a trap for out-of-town visitors
- Prices could be better
- Provide lists of race shops, locations, etc.
- Public Transit
- Racing Information
- Road construction was a nightmare but it is everywhere
- Saw them in action in two times
- Shooting Range
- Show off more local eating places
- Signage for attractions are like for locals, like you need to know where stuff is...fix this
- Signage for attractions in Cabarrus county/Charlotte Area is terrible. Fix this
- Signs at exit of parking lots showing which road you will be required to take by the police at end of races.
- Signs put ahead of time not right on the turn.
- The state high way patrol were scary
- There would be anything with NASCAR.
- Too many Dale Earnhardt's Blvd. It makes me lost
- Tours that are affordable
- Traffic in and out of track
- Traffic around Concord Mills was difficult
- Traffic around racetrack was a little hectic
- Traffic at exit 49
- Traffic is a REAL problem in too many areas
- Very good experience
- We had a wonderful visit and will return soon
- We have never had any problems when we are in Cabarrus County.
- When Kids 10 years old and under eat free, be sure it is not the child that is 3 years old only. When one adult brings the family expenses can get out of hand if the ad is misleading.
- Wouldn't change anything

What type of activities would appeal to you if offered in Cabarrus County?

Other:

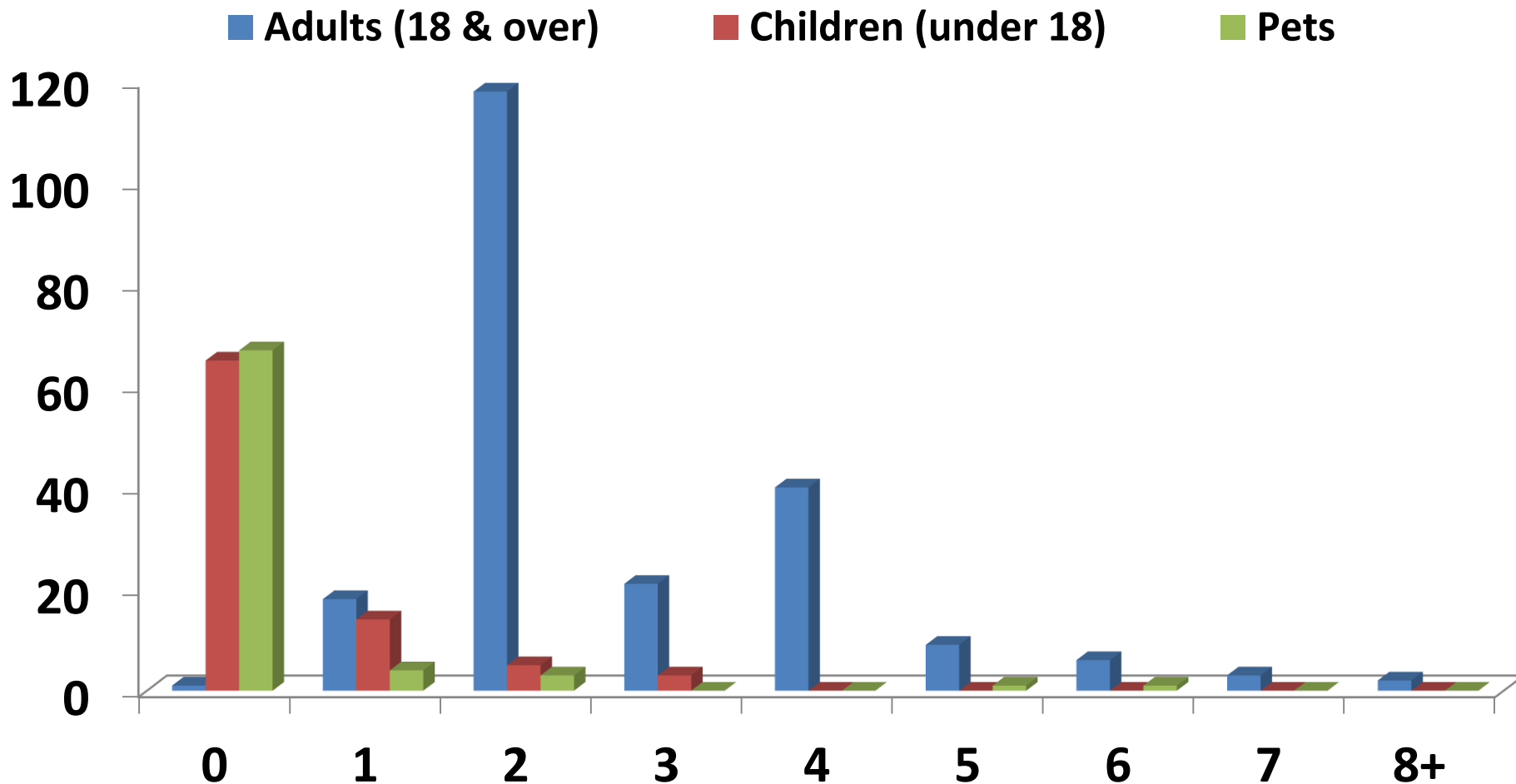
- Broadcast college football or sports on the movie screen at the speedway
- Campground for CRV and tent camping
- Casino
- Get Better Signage for Race Shop Locations
- Great Wolf Lodge
- It's all good would love to live there
- Keep the charm and more hiking trails with good signage.
- More kids' stuff
- More middle of the road restaurants. Not fast food
- More small kid friendly activities like a children's museum
- More southern gospel music concerts other than in local churches
- N/A the stay is not to long!
- None
- Only interested in races/Nascar
- Our main focus is the race
- Outdoor tourist things to do
- Racing and other automotive events.
- Was everything we dreamed it would be and we already booked for next Octobers race even though the camping infield doubled in price. It's well worth every bit spent!!
- We came for the racing
- What you have is fine, keep it up



Cabarrus County Visitor Profile

Race Event
n=219

How many were in your immediate travel party? n=219



Top 5 activities race event visitors reported participating in:

Answer Options	Response Percent
Auto racing event	93.1%
Shopping at local stores/mall	67.4%
Auto race team shop tour	67.0%
Shopping at event/vendors	53.2%
Driving/sightseeing	39.0%

Top 5 major attractions/events race event visitors reported participating in:

Answer Options	Response Percent
Charlotte Motor Speedway	89.4%
Concord Mills Mall	65.6%
Hendrick Motorsports	61.9%
Stewart-Haas Racing	48.2%
Roush Fenway Racing	43.6%

All activities race event visitors reported participating in:

Activities	Response Percent
Downtown Concord	32.1%
Downtown Kannapolis	27.5%
Attend sports event	26.6%
Visit a museum	18.3%
Camping	15.6%
Sleep late/take a nap	15.1%
Attend a festival/event	12.8%
Visit a historic site	11.9%
Concert/live performance	7.8%

Activities	Response Percent
Visit a park	5.0%
Business	3.7%
Other	3.7%
Golf	2.8%
Hiking/cycling	2.3%
Motorcycle riding	1.8%
NC Research Campus	0.9%
Meeting/conference/training	0.5%
Hunting/fishing	0.5%

All major attractions/events race event visitors reported participating in:

Attractions/Events	Response Percent
Earnhardt-Ganassi Racing	39.4%
Dale Earnhardt Plaza	36.2%
ZMax Dragway	32.6%
Richard Petty Motorsports	30.3%
Sam Bass Gallery	27.5%
Concord Speedway	19.7%
NASCAR Speedpark	18.8%
NASCAR Racing Experience	15.6%
Curb Motorsports Museum	9.6%
Richard Petty Driving Experience	9.2%

Attractions/Events	Response Percent
US Legends Car International	6.9%
Cabarrus Museum	6.4%
Cabarrus Arena & Events Center	4.1%
NC Music Hall of Fame	4.1%
Rocky River Vineyards	3.2%
Verizon Wireless Amphitheatre	1.4%
Reed Gold Mine	0.9%
Art Council Gallery & Davis Theatre	0.5%
Carolina Courts	0.0%

What type of activities would appeal to you if offered in Cabarrus County?

Answer Options	Response Percent
Concerts - country/western	41.9%
More nighttime entertainment	31.0%
Concerts - contemporary/pop/rock	29.7%
Outdoor drive-in movie theatre	27.7%
Arts and antique district	16.8%
Upscale finer dining/chop house	14.8%
Upscale RV park resort	14.2%
Horse racing event center	13.5%
Downtown Concord upscale unique hotel	11.6%
Unique boutique shopping	11.0%
Live theater series (musicals & plays)	9.0%
Other	9.0%
Concerts - classical	5.8%

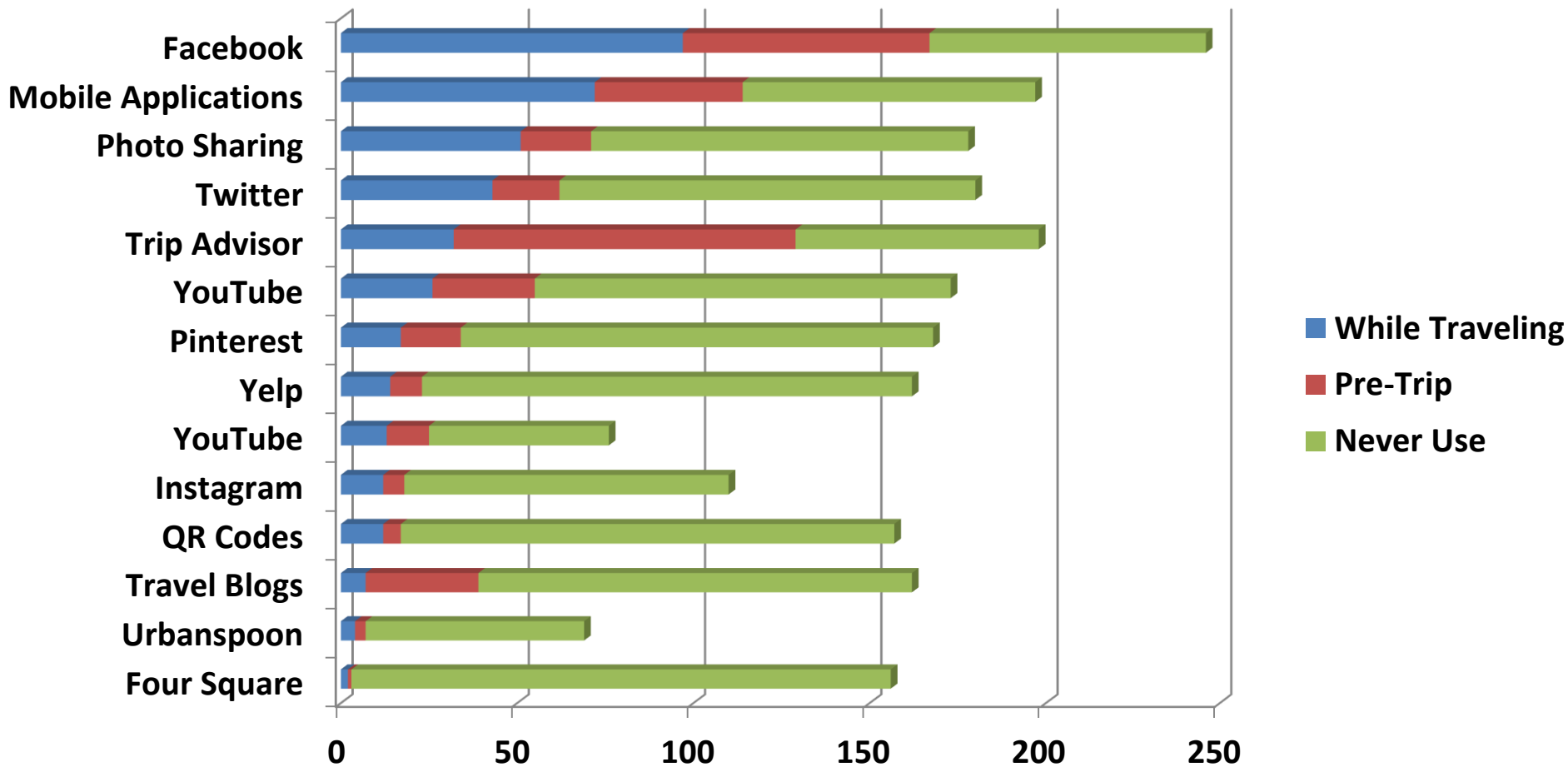
How much did you pay for your lodging/accommodations WHILE IN Cabarrus County?

Answer Options	Overnight Average	Daytrip Average
Lodging:	\$449.15	\$0.00

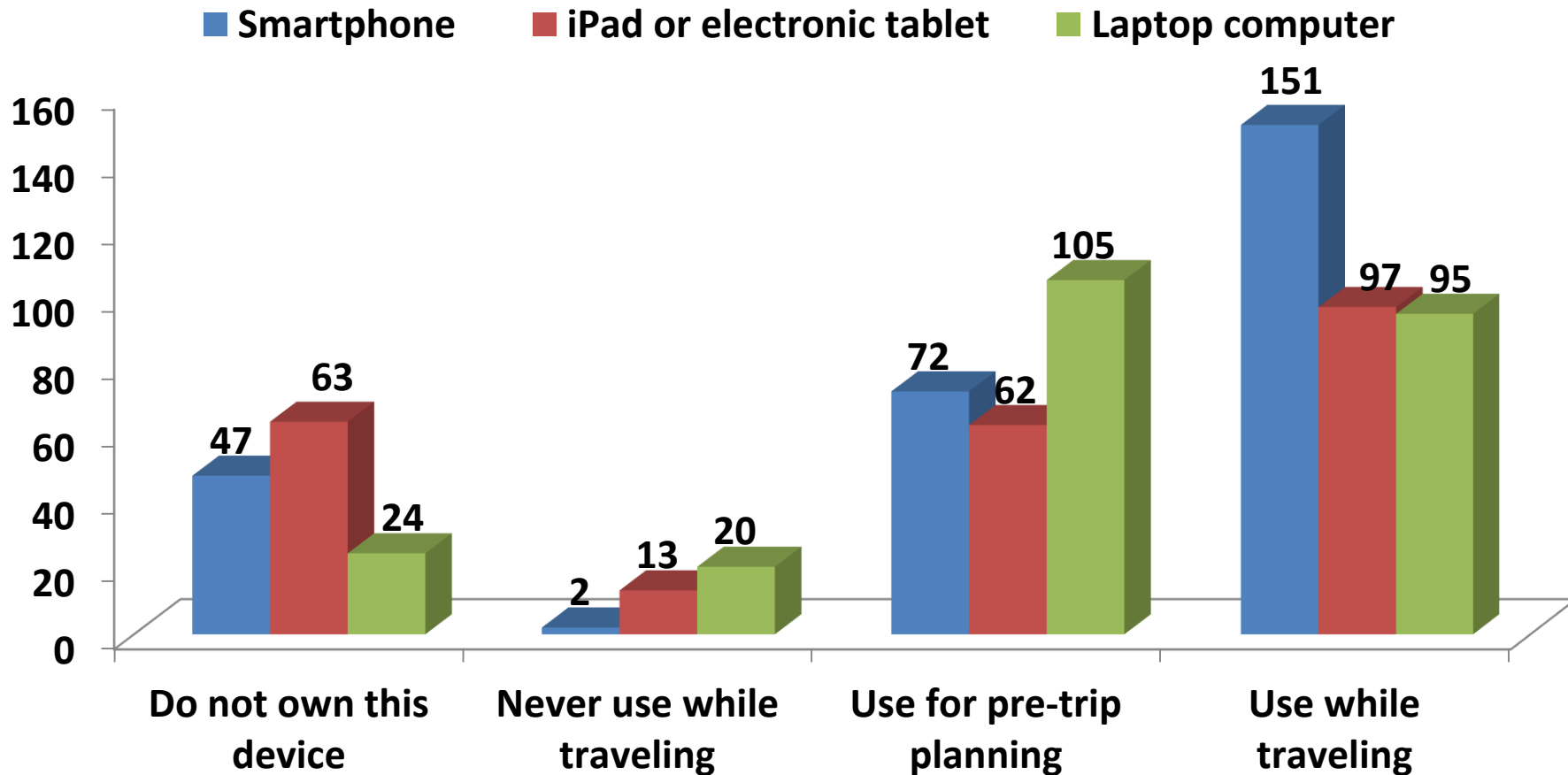
How much did your party spend WHILE IN Cabarrus County?

Answer Options	Overnight Average	Daytrip Average
Food/meals:	\$257.47	\$113.91
Attractions/events:	\$368.88	\$294.66
Shopping:	\$255.32	\$157.04
Auto Fuel:	\$145.54	\$78.04

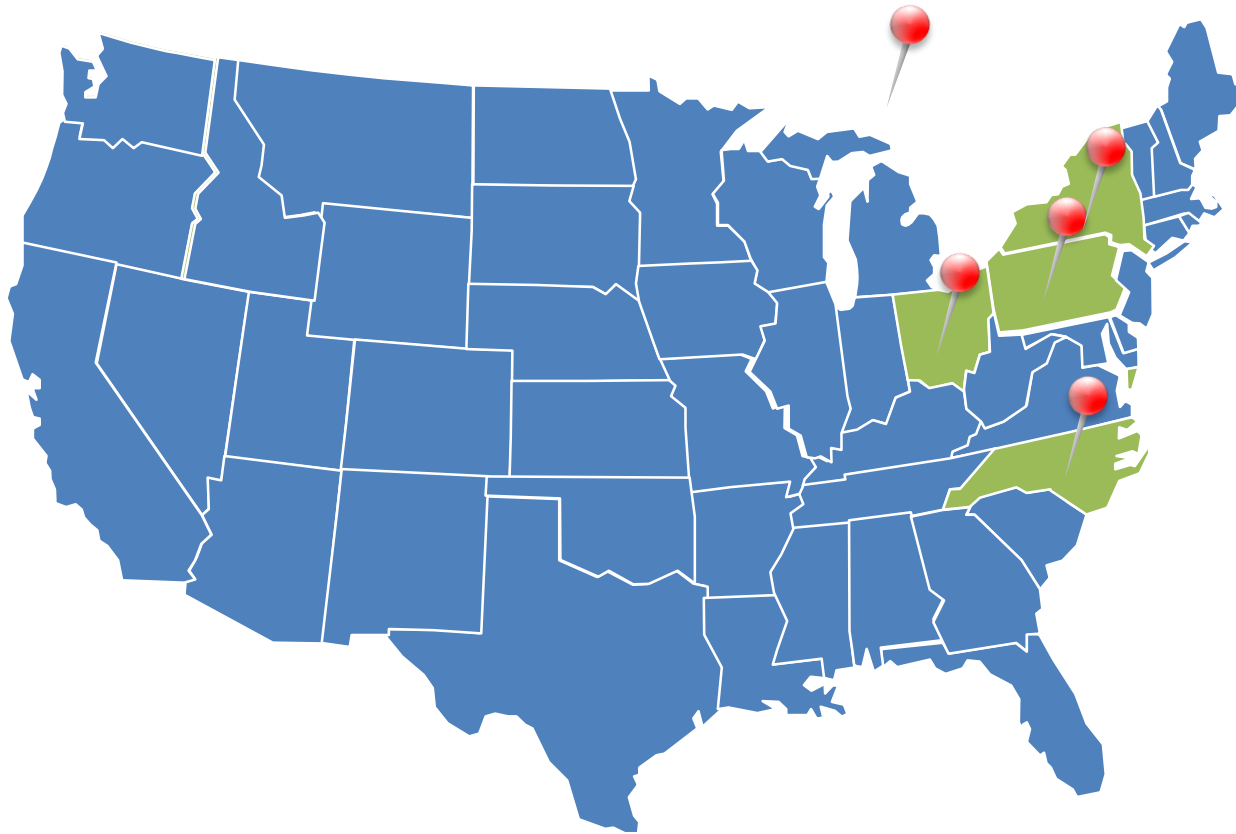
When do you use the following social media sites or applications as part of your travel? n=198



How do you use the following mobile devices related to your travel(s)? n=202



Top 5 Points of Origin – Race Event Visitors



1 – North Carolina - 13%

2 – Ohio -10 %

3 – Pennsylvania- 9%

4 – New York - 6%

5 – Ontario, Canada - 6%

Points of Origin – Race Event Visitors



Visitor Survey Verbatims – Race Event

Please state the name of any website, print publication, television advertisement, radio station, etc. where you found information regarding visiting Cabarrus County.

- Charlotte Motor Speedway (13)
- NASCAR (13)
- Google (7)
- Visitcabarrus.com (5)
- Nascar.com (4)
- Tripadvisor.com (3)
- Whereracinglives.com (3)
- Visitors guide (2)
- ZMAX Dragway (3)
- AAA tour book
- AAA.com
- Bank of America coupon via mail for B of A 500
- Bass pro shops
- Bing.com
- Booking
- Brochure aboard Piedmont Train
- Caa
- Cabarrus county site
- Cabarrus cty
- Cabarrus travel guide
- Cabarrus travel magazine I received at the drag way
- Charlotte
- Charlotte motor speedway magazine
- Charlotte motor speedway ad
- Charlotte NC
- Charlotte news
- Charlotte raceway and links
- Charlotte speedway
- Choice Hotels
- Emails
- Expedia
- From Bank of America I was sent a coupon voucher for the B of A 500 Race
- Hotel
- Hotelguides.com
- [Http://www.visitnc.com/free-travel-publications](http://www.visitnc.com/free-travel-publications)
- Jayski
- Mustang Club of America
- Nascar Hall of Fame
- Nascar sites
- Nascar track
- National dragster magazine
- Northcarolinavisitorscenter.com
- Stayed at the Courtyard Marriott in Charlotte
- The Dale Trail
- Things to do in charlotte
- Various wild card searches
- World of outlaws
- [Www.googlemaps.com](http://www.googlemaps.com)
- [Www.mapquest.com](http://www.mapquest.com)
- [Www.pinterest.com](http://www.pinterest.com)
- [Www.visitcabarrus.com](http://www.visitcabarrus.com)
- Zmax schedule

Visitor Survey Verbatims – Race Event

If you found Cabarrus County tourism information from an INTERNET SOURCE, please indicate which ones.

Other:

- Charlotte motor speedway (2)
- Jayski (2)
- Aaa
- Bing.com
- Cms site
- Driving through
- E-mail from b of a for the race
- Google
- Google
- Holiday inn
- Hotel chain
- Marriottt rewards website
- Nascar.com
- Race team websites

What inspired you to go to www.visitcabarrus.com or www.whereracinglives.com?

Other:

- Bank of America 500
- E-mail
- Outlet shopping
- Used to live in concord
- We googled Nascar race shops to get addresses

How can we improve or add to your visitor experience in Cabarrus County?

Top 3:

1. Finish road construction
2. Offer discounts during race weeks
3. Improve signage

- Absolutely amazing area and people
- Access to race shop tours
- Additional RV campgrounds for larger motorhomes
- After thanksgiving sale at track was a joke
- After the major races, they could do a much better job of getting fans out of the parking lots in a timelier manner, instead of letting us "sit" for 2 hours after the race.
- All is fine
- All traffic going out after a race.
- All was good
- Beautiful area
- Better directions to find all race shops and attractions on the roads
- Better signage
- Better signage and routing of traffic with race events
- Better traffic control.
- Can't get better than camping infield during race!
- Can't think of anything, met so many friendly people to help.
- Christmas lights was a joke
- Clean up Dale Earnhardt sir's status it looks bad and he deserves better I visit twice a year
- Construction, limit the construction during major race events, or work faster to get it done.

- Don't know of anything
- Don't really have any
- Drivers need to make more appearances and appreciate the money the fans are spending.
- Everything is spectacular already
- Everything was great (2)
- Find me a decent home in a nice area
- Finish road construction around the area
- Finish the road construction
- Finishing the road work on the interstate would help a lot!
- Friendliest people in the south.
- Generally we are pleased with what the county provides
- Have good sunny day
- Have always enjoyed my stay here
- Have more information on racing experiences
- Help keep hotel prices fair during race events.
- Hotel prices are crazy and should be illegal for race events - that's why tracks are empty and seats have been removed from charlotte motor speedway. Someone needs to control this.
- I had a great time
- I'm not sure
- Improve signage for race shops and race museums
- It's always great
- Keep doing what you're doing
- Like as is
- Lower prices
- Markets for fresh veggies/fruits

How can we improve or add to your visitor experience in Cabarrus County?

- More affordable cab service without county line fees
- More affordable lodging during race events
- More discount coupons
- More driver events! (3)
- More lanes for traffic in Mooresville by exit 36 off i-77
- More maps
- More mph signs
- More organization of traffic after races
- More street signs, streets are not well marked
- Not much open to have dinner on thanksgiving night
- Nothing I'm aware of enjoy the area
- Nothing (10)
- Nothing to add, we just enjoy coming to the races and auto fair and visiting race shops.
- Nothing, we found everything we wanted
- Or a piece of land wooded back yard
- Packages
- Please send me information on all the race shops / Nascar attractions
- Possible packages for race tickets, hotel stay, and dining
- Race was good but not many vendors at the race.
- Road construction at the time made it a little tricky
- Send discount coupons
- Send newsletters of upcoming events (about 2 mo. Prior)
- Shuttles
- Sponsor trips to race teams headquarters
- Stopped coming tired of getting gouged at the races and the hotels.
- There isn't. Nothing to improve-always exceeds our expectation
- Totally fed up with the whole NASCAR thing. It's a shame been a fan for long time but last year was it.
- Traffic
- Traffic pattern leaving Zmax post-race is less than desirable
- Traffic. We stayed at the family campground at the speedway and it was hard to get out they won't let you turn left
- Update maps to attractions
- Very friendly people
- We have never had a problem.
- Well organized
- Work on other package or specials with restaurants
- Work on package deals with hotels for the race
- Work out savings plans for hotels around the race in October
- You have a beautiful area but I thought everyone was going to work together. The crap I went through. Being disabled had a track worker say you don't look disabled to me. I don't need that crap. Police were not helpful. I'm not coming back there.
- Your welcome center is the best - couldn't be any nicer or more helpful!

What type of activities would appeal to you if offered in Cabarrus County?

Other:

- All was good
- Go carting
- Good already
- I like it just the way it is
- Leave everything as is, perfect size area, wonderful people, and a great area to visit-can't wait for next visit. Thank you for your hospitality.
- More driver events!
- None
- None, we are there for the race weekend events only
- Not sure, like everything already
- Nothing in particular
- Promote the racing shops and museums better
- Race shops and race related
- Racing
- We just do racing and racing related.

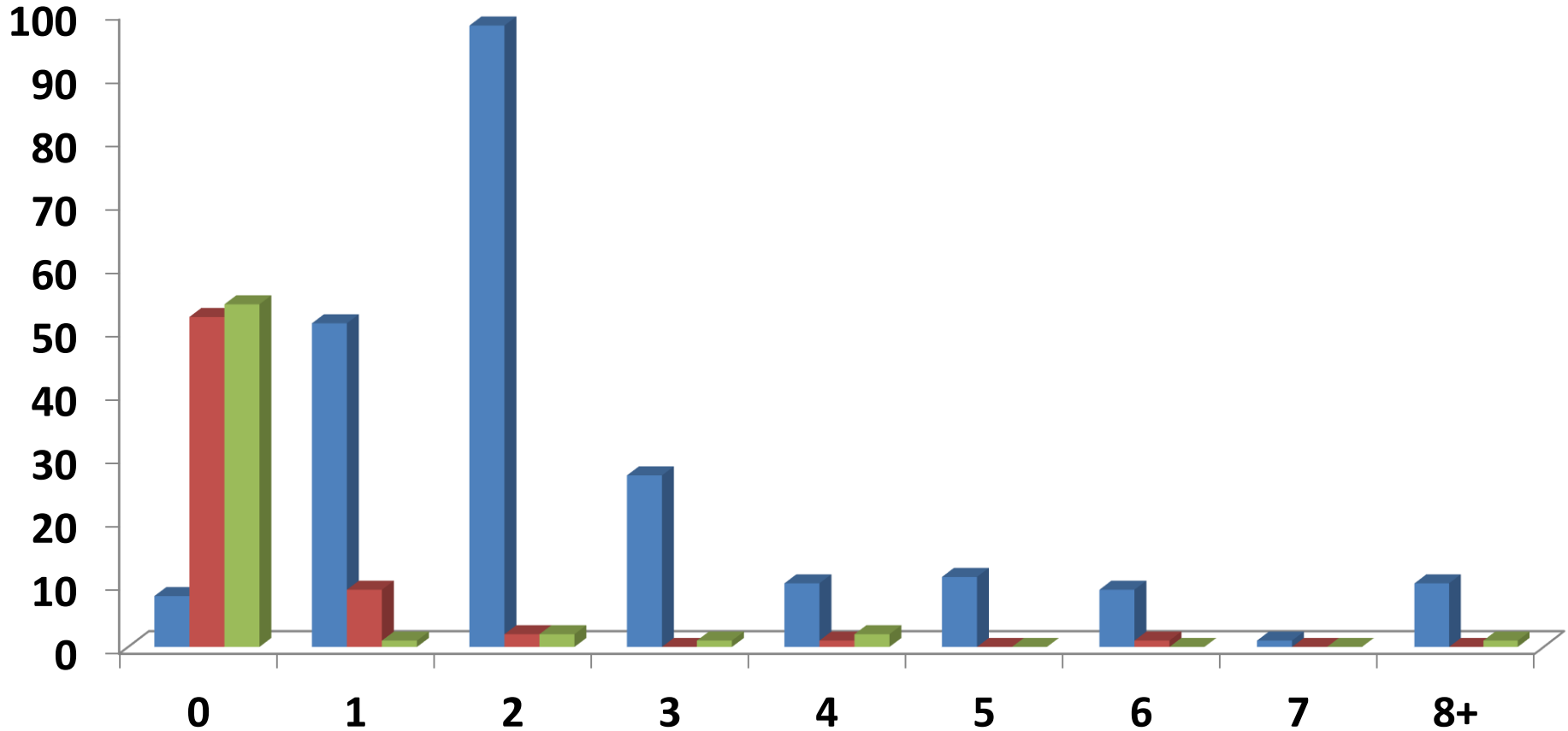


Cabarrus County Visitor Profile

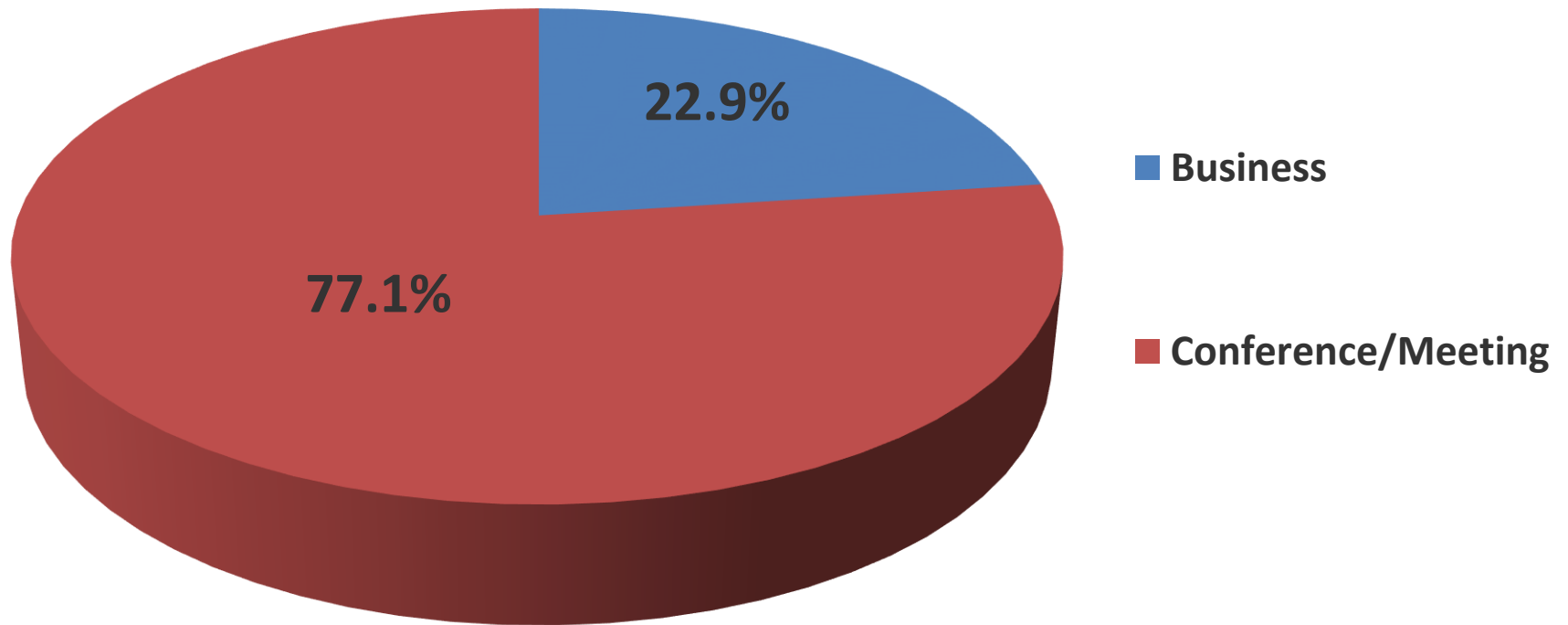
Business/ Conference/
Meeting/University Related
n=227

How many were in your immediate travel party? n=226

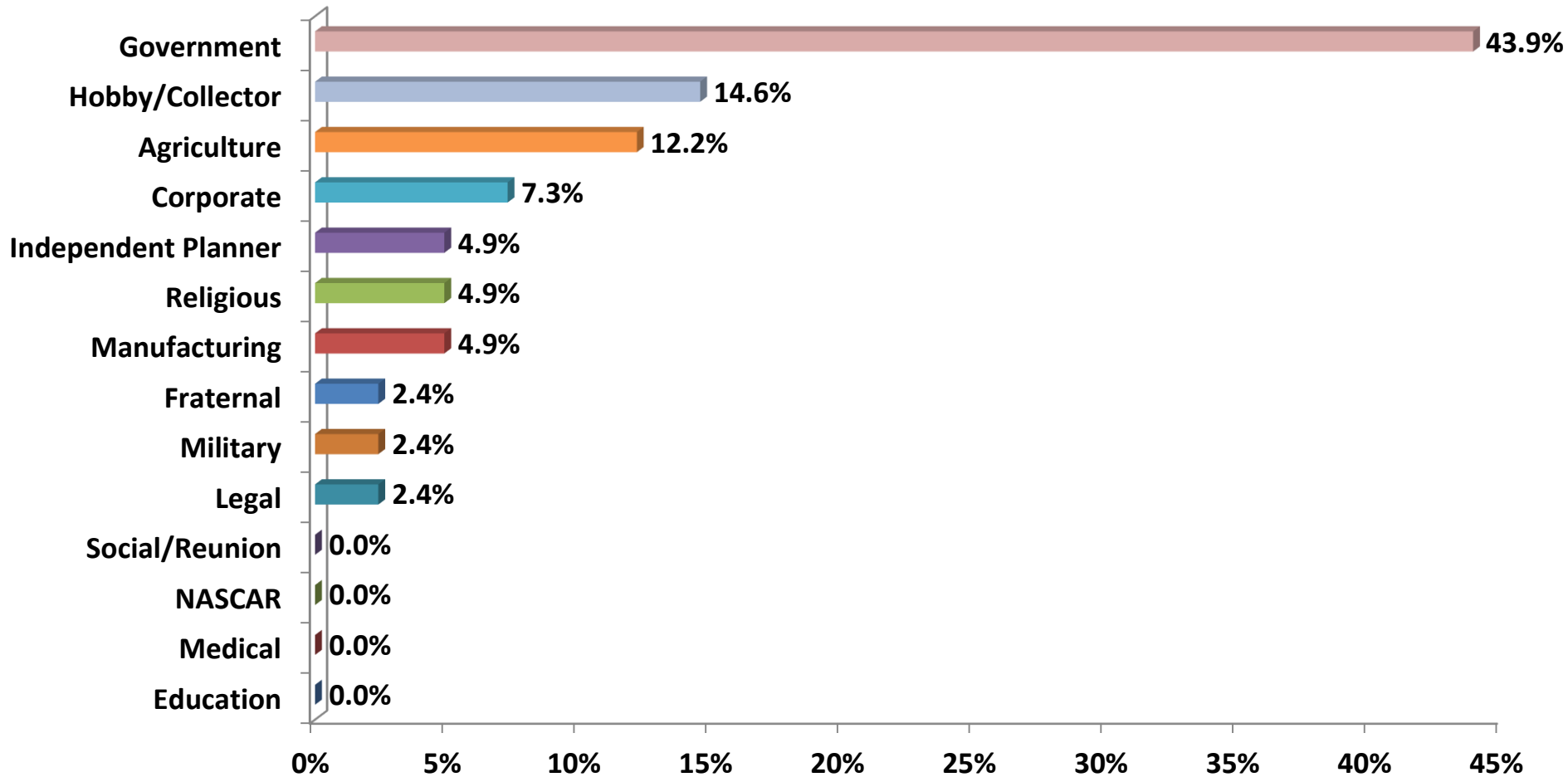
■ Adults (18 & over) ■ Children (under 18) ■ Pets



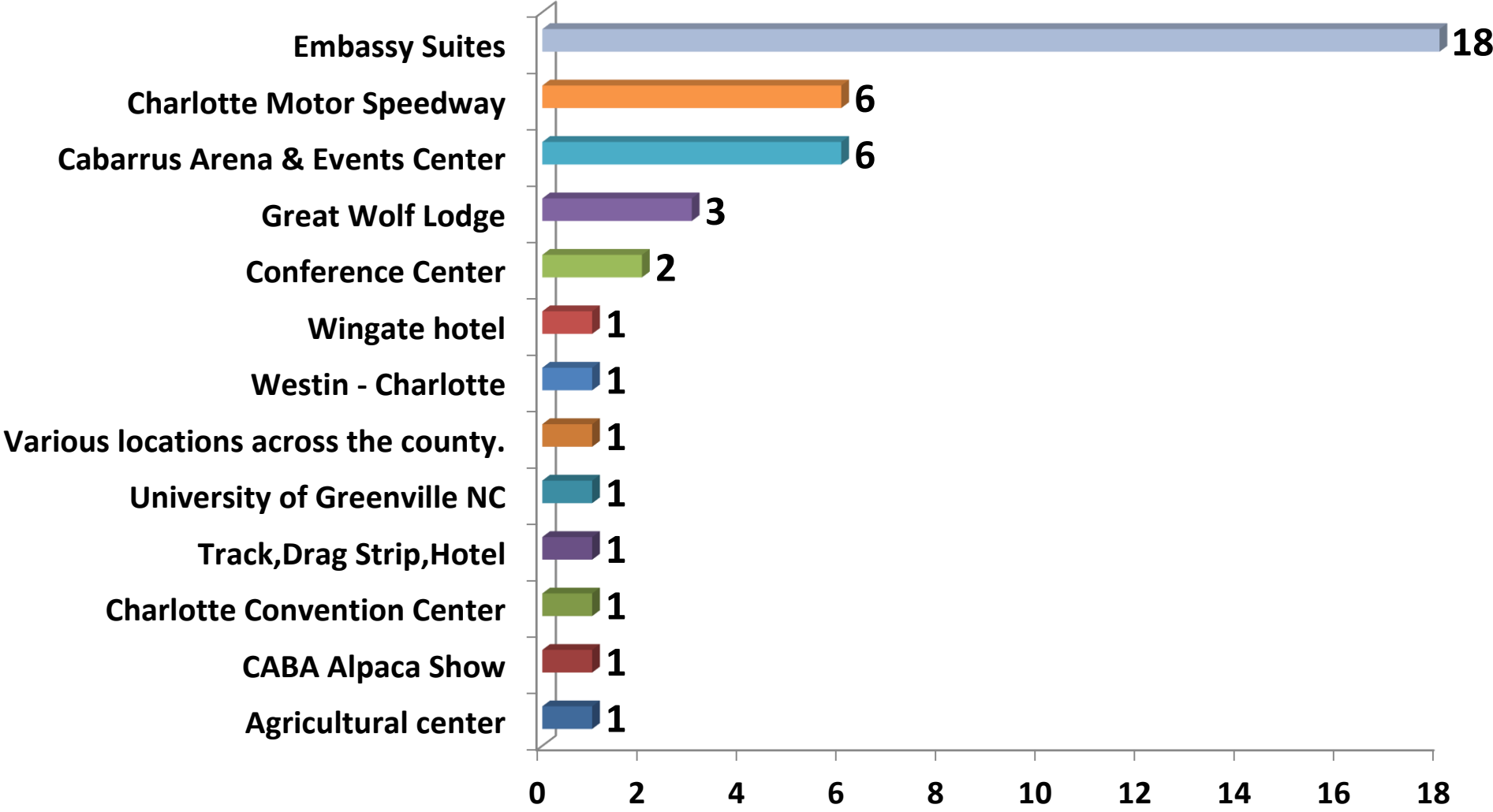
What was the MAJOR purpose of your most recent trip to Cabarrus County? n=227



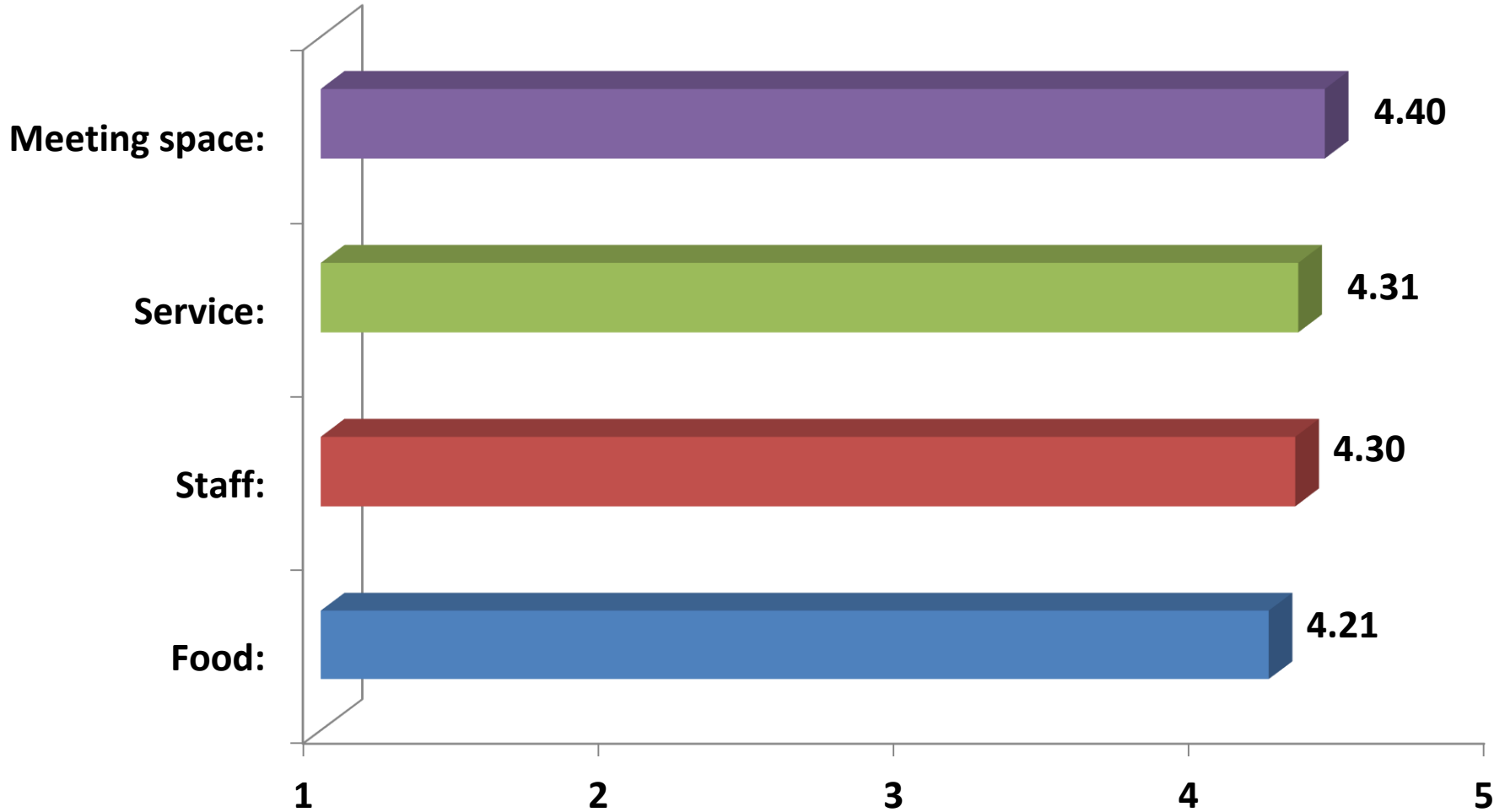
Please describe the market segment of the conference/meeting you attended. n=41



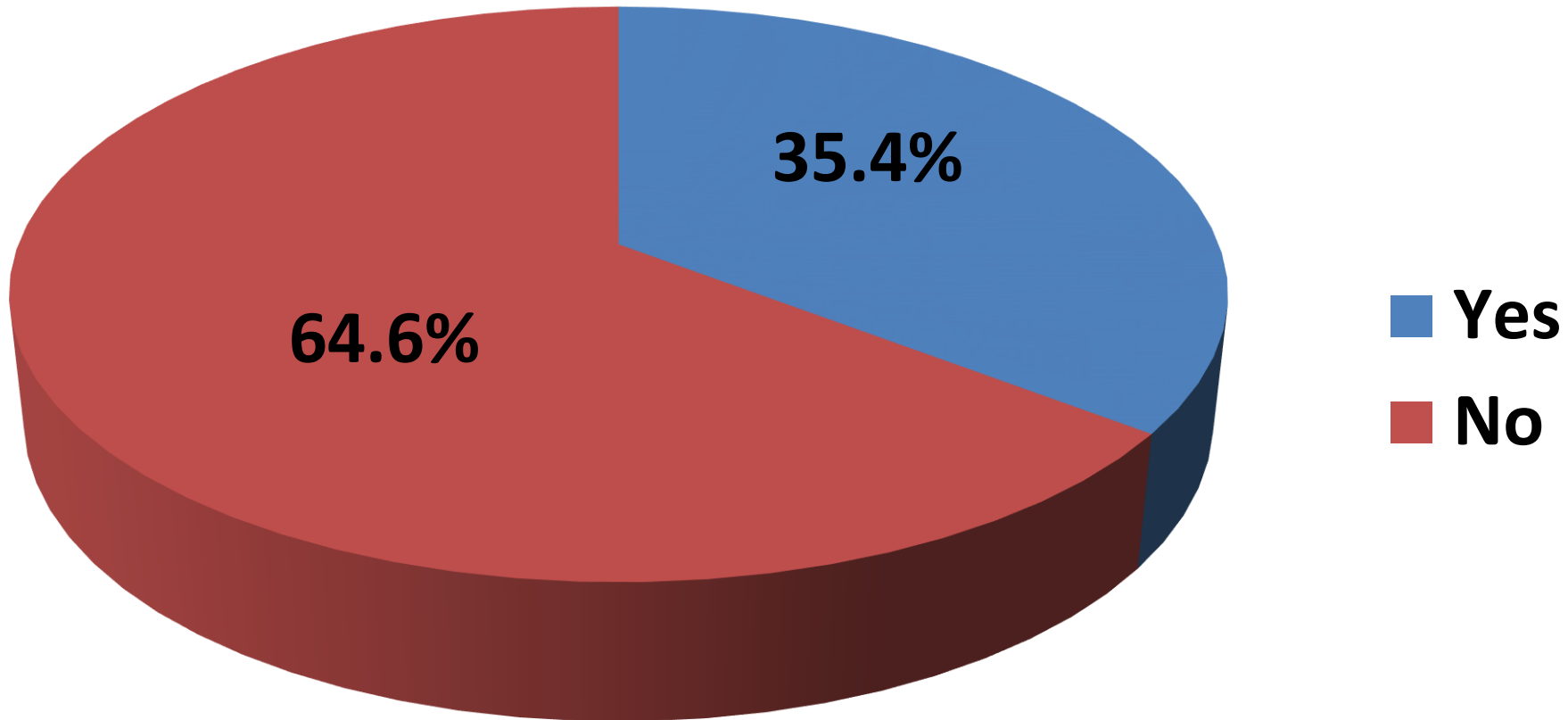
Where was the meeting held? n=44



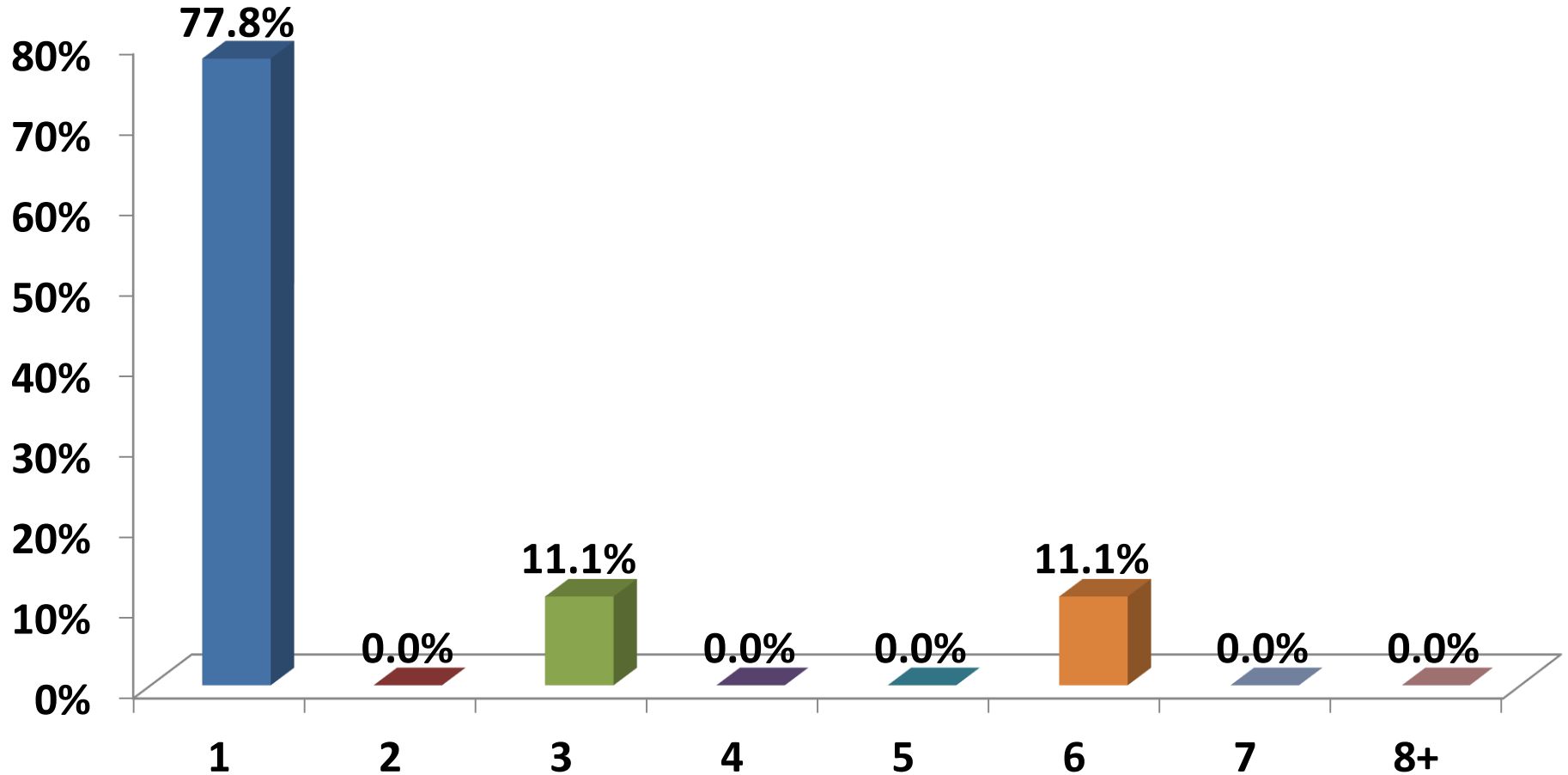
Rate Cabarrus County as a meeting destination. n=48



Did family members accompany you on this trip? n=48



If you extended your stay beyond the conference, please tell us by how many nights? n=9



Top 5 activities business/conference/meeting visitors reported participating in:

Answer Options	Response Percent
Meeting/conference/training	60.6%
Shopping at local stores/mall	55.3%
Business	44.2%
Shopping at event/vendors	37.6%
Downtown Concord	26.1%

Top 5 major attractions/events that business/ conference/ meeting visitors reported participating in:

Answer Options	Response Percent
Charlotte Motor Speedway	53.7%
Concord Mills Mall	46.9%
Cabarrus Arena & Events Center	26.3%
ZMax Dragway	13.7%
Hendrick Motorsports	13.1%

All activities bus/conf/mtg visitors reported participating in:

Activities	Response Percent
Attend a festival/event	21.2%
Driving/sightseeing	21.2%
Auto race team shop tour	17.3%
Motorcycle riding	15.9%
Sleep late/take a nap	11.9%
Downtown Kannapolis	10.6%
Auto racing event	9.7%
Visit a museum	9.7%
Visit a historic site	5.3%

Activities	Response Percent
Camping	3.5%
Attend sports event	2.2%
Visit a park	0.9%
Concert/live performance	0.9%
Hiking/cycling	0.4%
Hunting/fishing	0.4%
Golf	0.0%
NC Research Campus	0.0%

All major attractions/events bus/conf/mtg visitors reported participating in:

Attractions/Events	Response Percent
Stewart-Haas Racing	9.1%
Roush Fenway Racing	8.0%
Dale Earnhardt Plaza	6.3%
Concord Speedway	5.7%
Earnhardt-Ganassi Racing	4.6%
NASCAR Racing Experience	4.0%
Sam Bass Gallery	3.4%
Richard Petty Motorsports	3.4%
Rocky River Vineyards	2.3%

Attractions/Events	Response Percent
Reed Gold Mine	1.7%
Curb Motorsports Museum	1.7%
NASCAR Speedpark	1.7%
Richard Petty Driving Experience	1.7%
Cabarrus Museum	1.1%
Verizon Wireless Amphitheatre	1.1%
US Legends Car International	1.1%
NC Music Hall of Fame	0.6%
Art Council Gallery & Davis Theatre	0.6%

New Activities and experiences that would appeal to Bus/Conf/Mtg visitors

Answer Options	Response Percent
More nighttime entertainment	41.1%
Arts and antique district	23.3%
Upscale finer dining/chop house	22.5%
Concerts - country/western	21.7%
Outdoor drive-in movie theatre	20.2%
Concerts - contemporary/pop/rock	20.2%
Upscale RV park resort	17.1%
Unique boutique shopping	15.5%
Downtown Concord upscale unique hotel	15.5%
Live theater series (musicals & plays)	14.7%
Other	12.4%
Horse racing event center	10.1%
Concerts - classical	3.9%

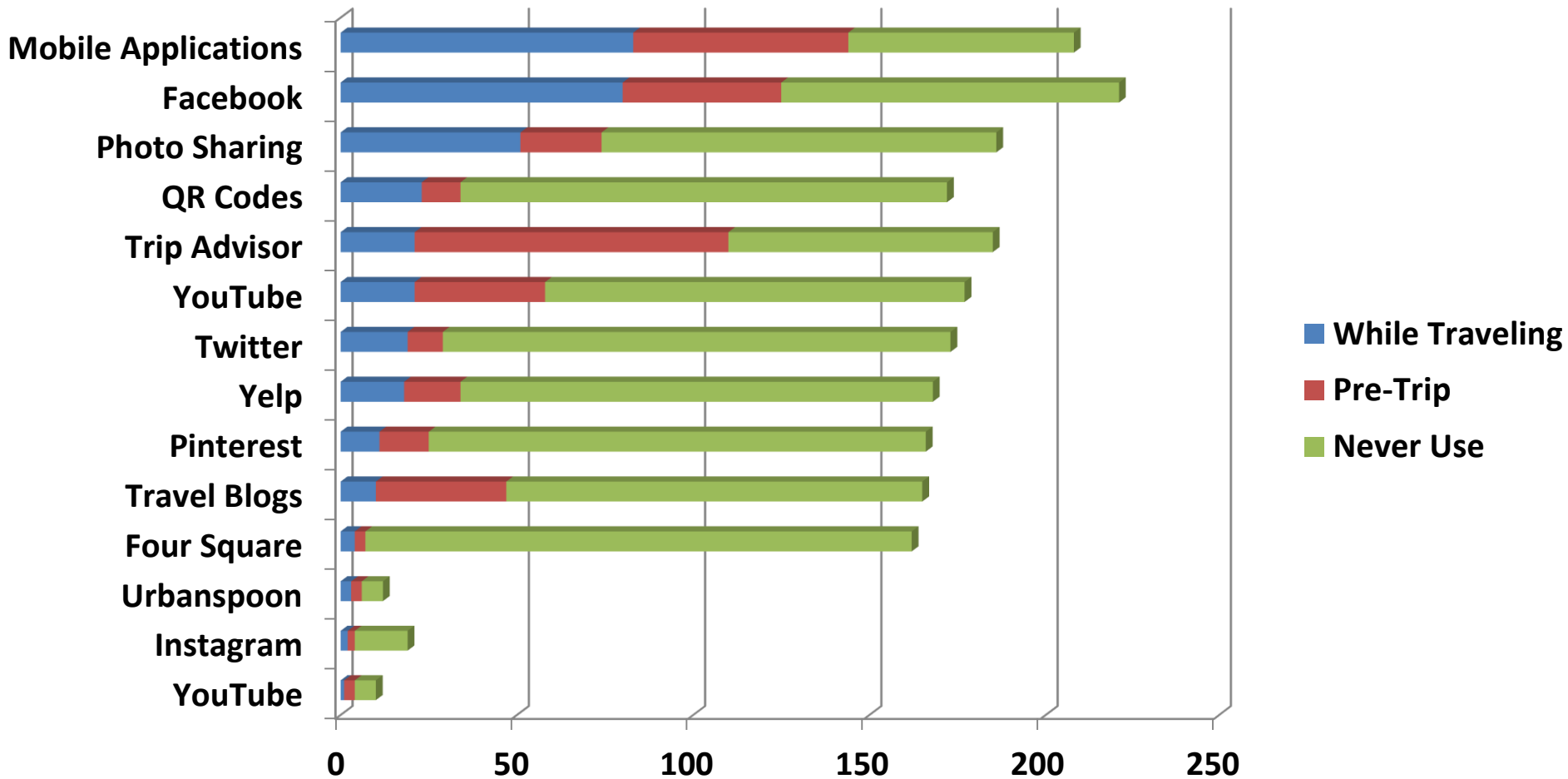
How much did you pay for your lodging/accommodations WHILE IN Cabarrus County?

Answer Options	Average
Lodging:	\$452.26

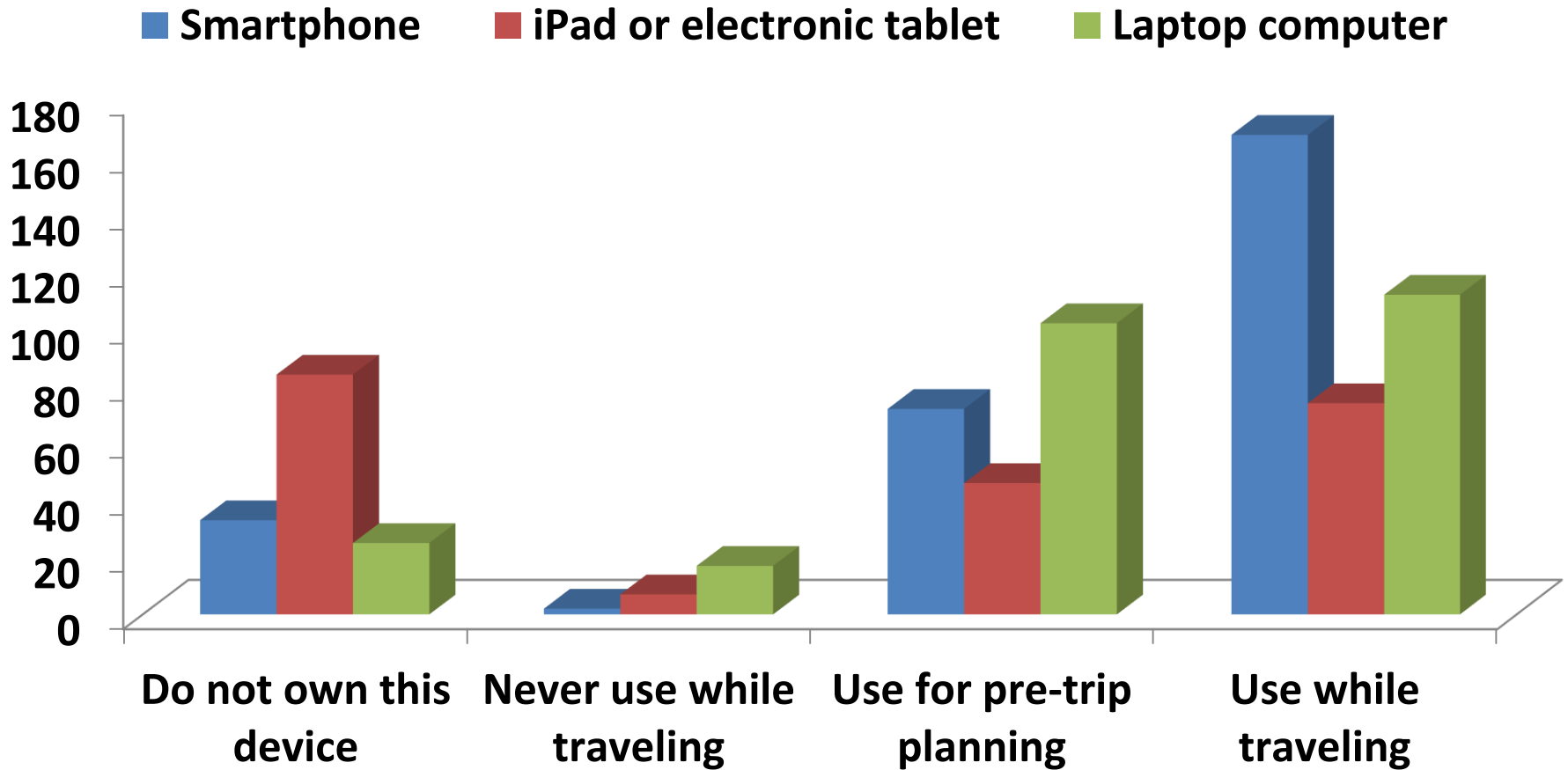
How much did your party spend WHILE IN Cabarrus County?

Answer Options	Overnight Average
Food/meals:	\$169.96
Attractions/events:	\$96.30
Shopping:	\$183.73
Auto Fuel	94.80

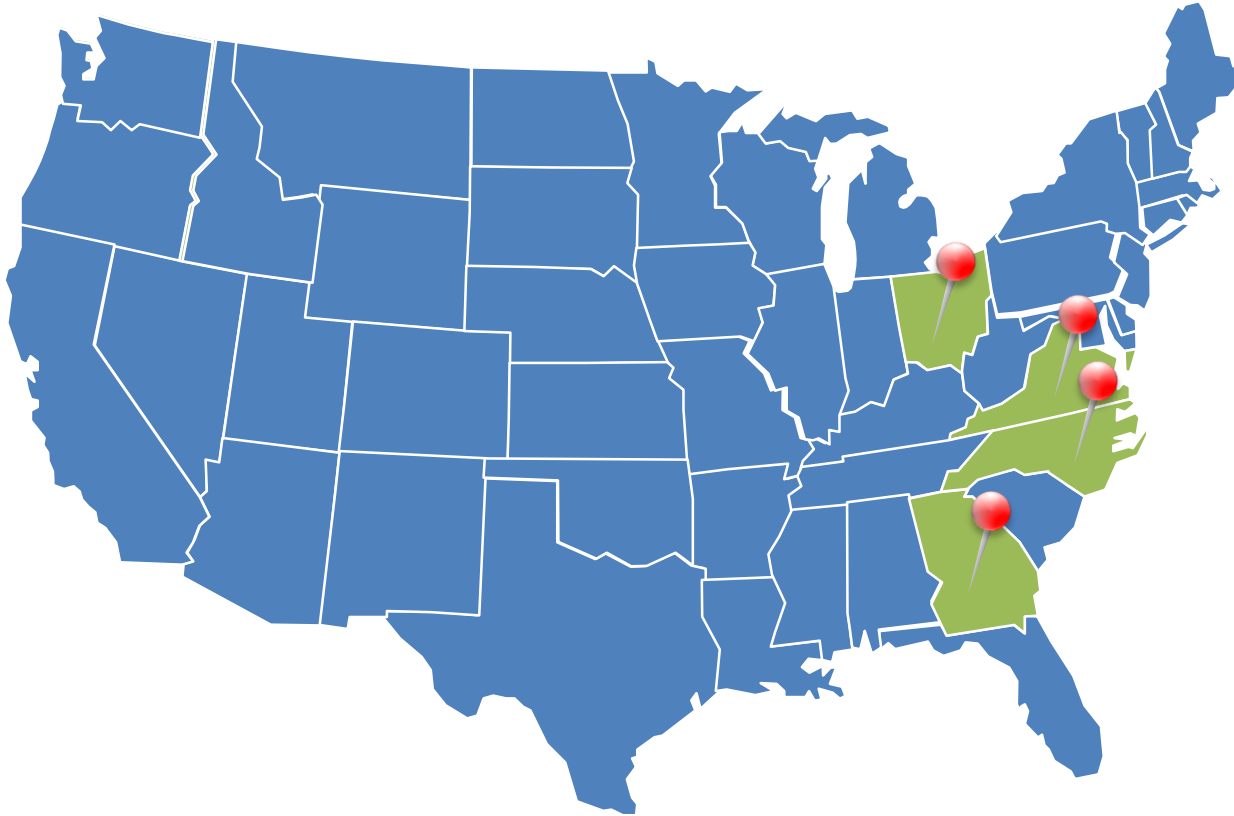
When do you use the following social media sites or applications as part of your travel? n=198



How do you use the following mobile devices related to your travel(s)? n=211



Top 4 Points of Origin – Business/Conference/Meeting Visitors



1 – North Carolina - 37%

2 – Ohio - 7%

3 – Georgia - 6.6%

4 – Virginia - 6.1%

Points of Origin – Business/Conference/Meeting Visitors



Visitor Survey Verbatims – Bus./Conf./Mtg.

Please state the name of any website, print publication, television advertisement, radio station, etc. where you found information regarding visiting Cabarrus County:

- Charlotte motor speedway (2)
- Expedia
- Google
- Google
- Mustang times
- Nhra race
- Pandora
- Priceline
- Travelocity
- Used google

What inspired you to go to www.visitcabarrus.com or www.whereracinglives.com?

- NASCAR (2)
- NASCAR summit (2)
- Wings over North Carolina (2)
- Fan/Dale Trail
- GWRRA NC Conference
- GWRRA-NC Rally
- Mustang Club of America

If you found Cabarrus County tourism information from an INTERNET SOURCE, please indicate which ones.

Other

- GWRRA (4)
- Google (3)
- Alpaca Show
- Around me app
- CABA
- Cabarrus Arena & Events Center website
- Cabarrus county arena
- CABO resources
- Cabo web site
- Did not find any cabarrus county information.
- Did not use internet
- Friend's email network
- Good Sam Club
- Groupon
- Holidayinexpress.com
- MCA Website. Googled "hotels". Also Googled "restaurants".
- Mustang 50th Birthday Celebration
- NASCAR Summit
- NCAZO Handouts
- None - didn't look for tourism info
- Priceline
- [Www.ncazo.org](http://www.ncazo.org)
- Yelp

How can we improve or add to your visitor experience in Cabarrus County?

Top 3:

1. **Better traffic patterns/finish road construction**
2. **Better signage**
3. **Decrease prices**

- 1.5 hours to get from mall to GWL (less than 2 miles)
- 85 traffic
- Add a dude ranch :)
- Add Convention Signs on Rt. 49 notably
- Add Downtown Seating/Benches
- Allow food vender in Cabarrus Arena
- Allow other food vendors at center.
- Arrange for private tours to Race shops for members of
- Bed and breakfast establishments
- Better food at the arena (3)
- Better signage
- Better signage for restaurants near I-85
- Better signage to convention center.
- Better sound system in the Cabarrus arena
- Better stocked stores
- Better traffic flow during race let out
- Bracelets/necklaces should have been left for those not able to pick up earlier
- Bring back the old Cabarrus Creamery!
- Cabarrus County is already a GREAT place to visit!
- Cheaper rides from airport to hotels
- Cherokee who works at Hampton Inn exit 60 is amazing!!

- Complete the construction on I-85
- Continued dining discounts through conferences/hotel stay.
- Could not get out of hotel road
- Coupons
- Customer knowledge with product they are selling
- Customer Service Training for Hospitality Workers
- Did not really interact with the County, only went to Downtown for Ice Cream/Concert and Motorcycle Rally at Arena
- Discounts for certain events
- Everything was fine.
- Fine the way it is
- Finish your road construction...ha ha.
- Good information for tourists
- Great overall experience!
- Have better guidance to where good spots are.
- Have downtown stores open during downtown events.
- Have more food varieties at Cabarrus Center when sponsoring a rally.
- Have motels and restaurants closer to Cabarrus Arena
- Holiday Inn Express NORTH - is NOT Concord!!!!
- Hotel rates are higher than Triangle and Triad, that is a deterrent
- Hotels and Restaurants around the Event Center
- Hotels should not charge such high rates for wireless
- I didn't know I was in Cabarrus County
- I would not change a thing
- Improve food at event center - Cabarrus
- Improve the traffic situation
- Improve traffic signage

How can we improve or add to your visitor experience in Cabarrus County?

- Lack of communicate on bracelets/necklaces
- Less expensive during race activities
- Less traffic
- List motorcycle-friendly destinations & routes
- Listings of attractions and locations published for visitors.
- Lodging closer to arena
- Lower food prices at event center-Cabarrus
- Make info more available
- More brochures on events
- More businesses open on Mondays downtown
- More children's activities-recycle/refurbish old vehicles around county and use funds/ vehicles for transportation museum
- More food open later at night (past 9pm)
- More hotels near the Cabarrus Arena
- More info on county arena
- More non chain restaurants
- More places open late
- More restaurants near Cabarrus Arena
- More Restaurants and stores around Arena
- More signage with alternative routes to attractions
- Nothing (8)
- Offer fishing trips
- Opportunities for tour.
- Provide more visitor info to alpaca show
- Put a hotel a closer to the arena
- Repeat service for next year
- Restaurant staff trained what to do when fire alarm sounds
- Road signs for Arena - hard to find
- Shuttles to/from hotels for sites
- Signage outside Cabarrus Arena pointing to each hotel
- The Experience was very enjoyable
- Traffic
- Traffic control
- Unknown at this time. First visit.
- Update directions for GPS units
- Venues need to be open later (museums)
- Visitor info provided@ NASCAR Summit needs improvement
- Wasn't there long enough to form this opinion
- We had a good time
- We thoroughly enjoyed our trip.
- Went for the Event.
- Wi-Fi and better cell signal in the Cabarrus Arena

What type of activities would appeal to you if offered in Cabarrus County?

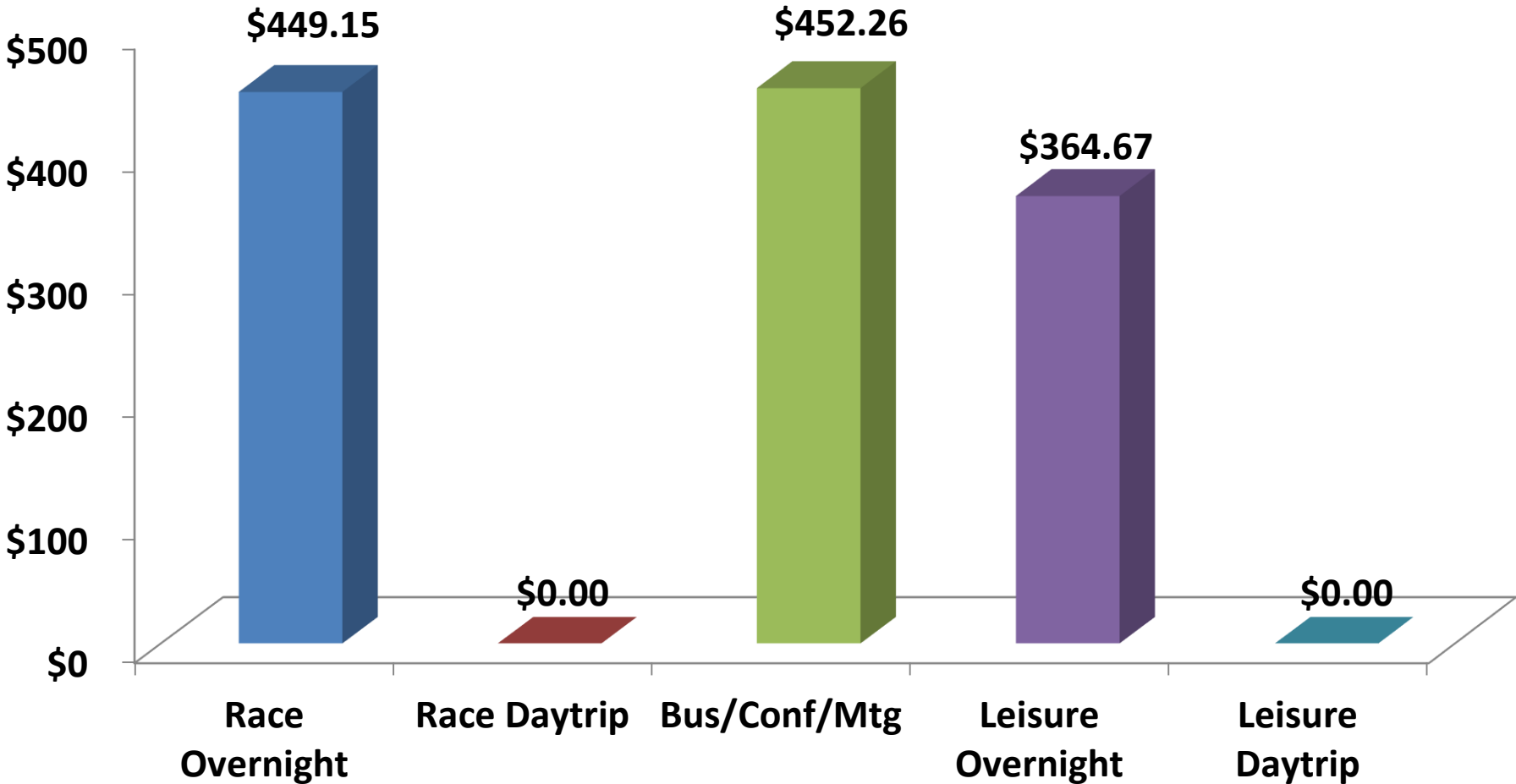
Other:

- Camping at arena was good, but needs electrical upgrade in order for more RVs/campers to be there next year
- Casino gambling
- Condo resort
- Contemporary Christian artists concert
- Local brewery
- More restaurant choices....especially is Kannapolis.
- More stores to be open when the events are downtown
- More tour information and listings of things to see, and why to go to them.
- N/a
- None
- Opera
- Race to get through county as soon as possible
- Too far for these events
- Try to let hotel staff know more about the area to assist guests
- Was working the wonc rally - will have to visit when on personal time
- We only come for the alpaca show

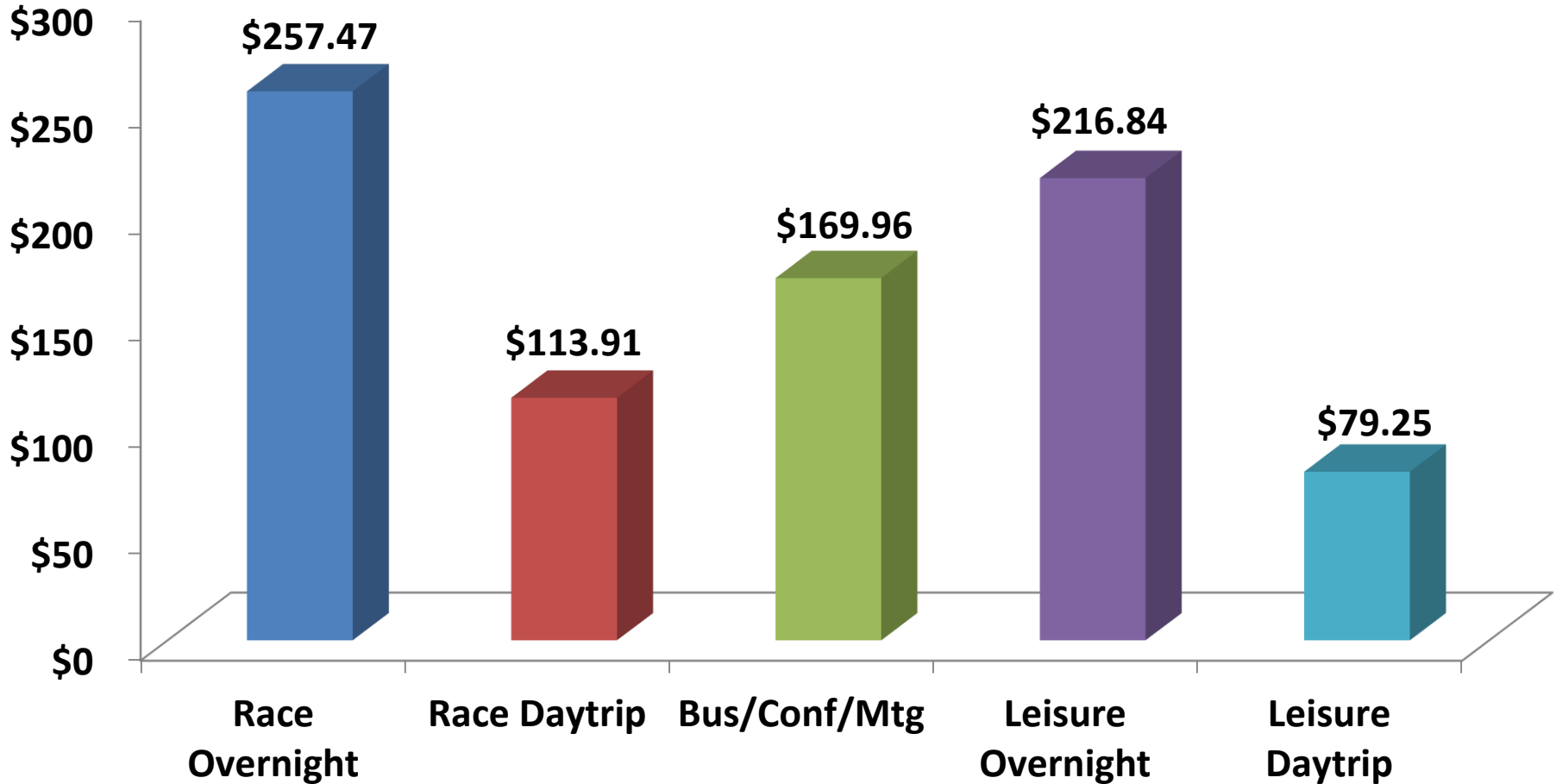


Cabarrus County Comparative Visitor Spending Data

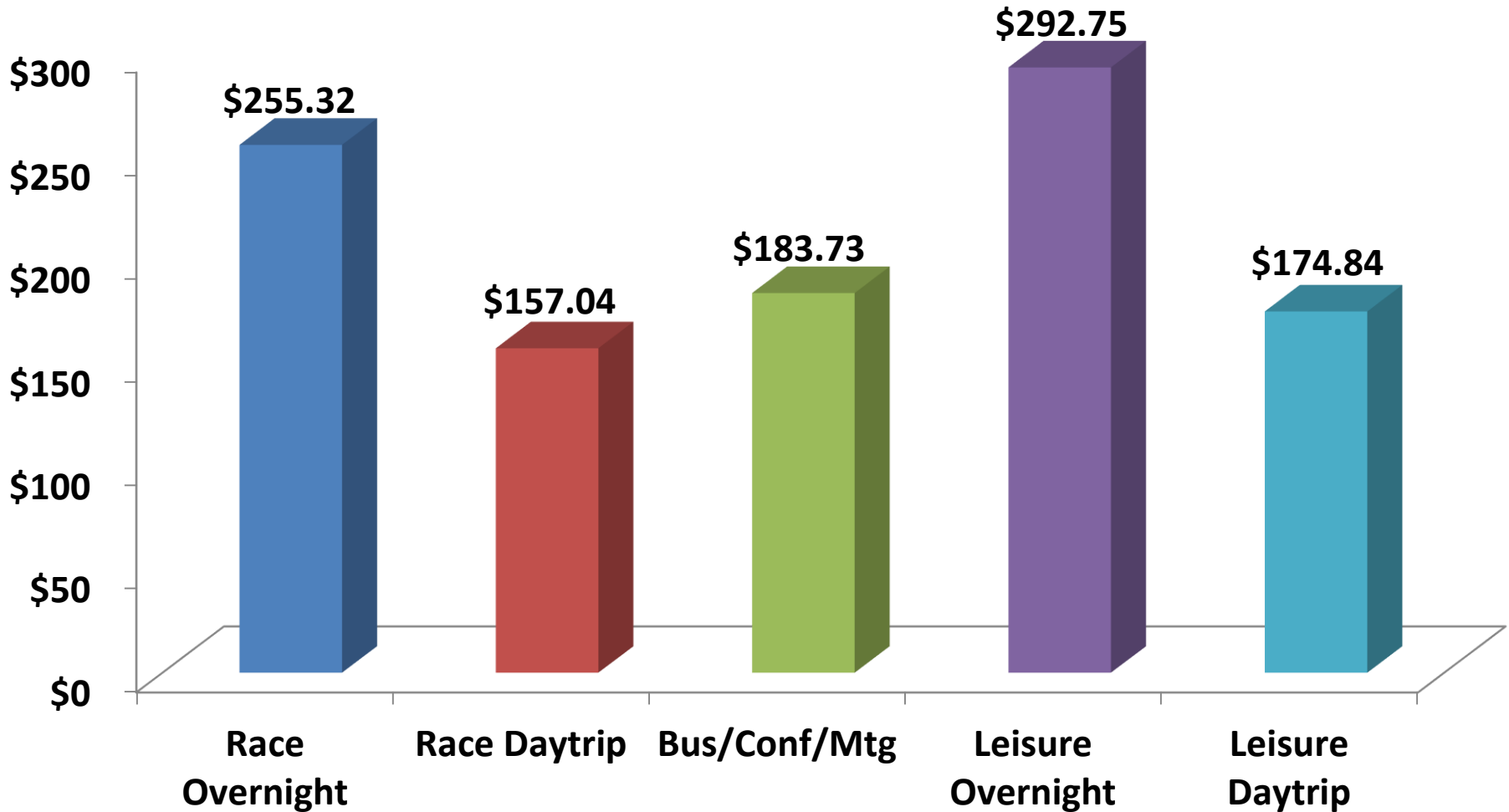
Lodging



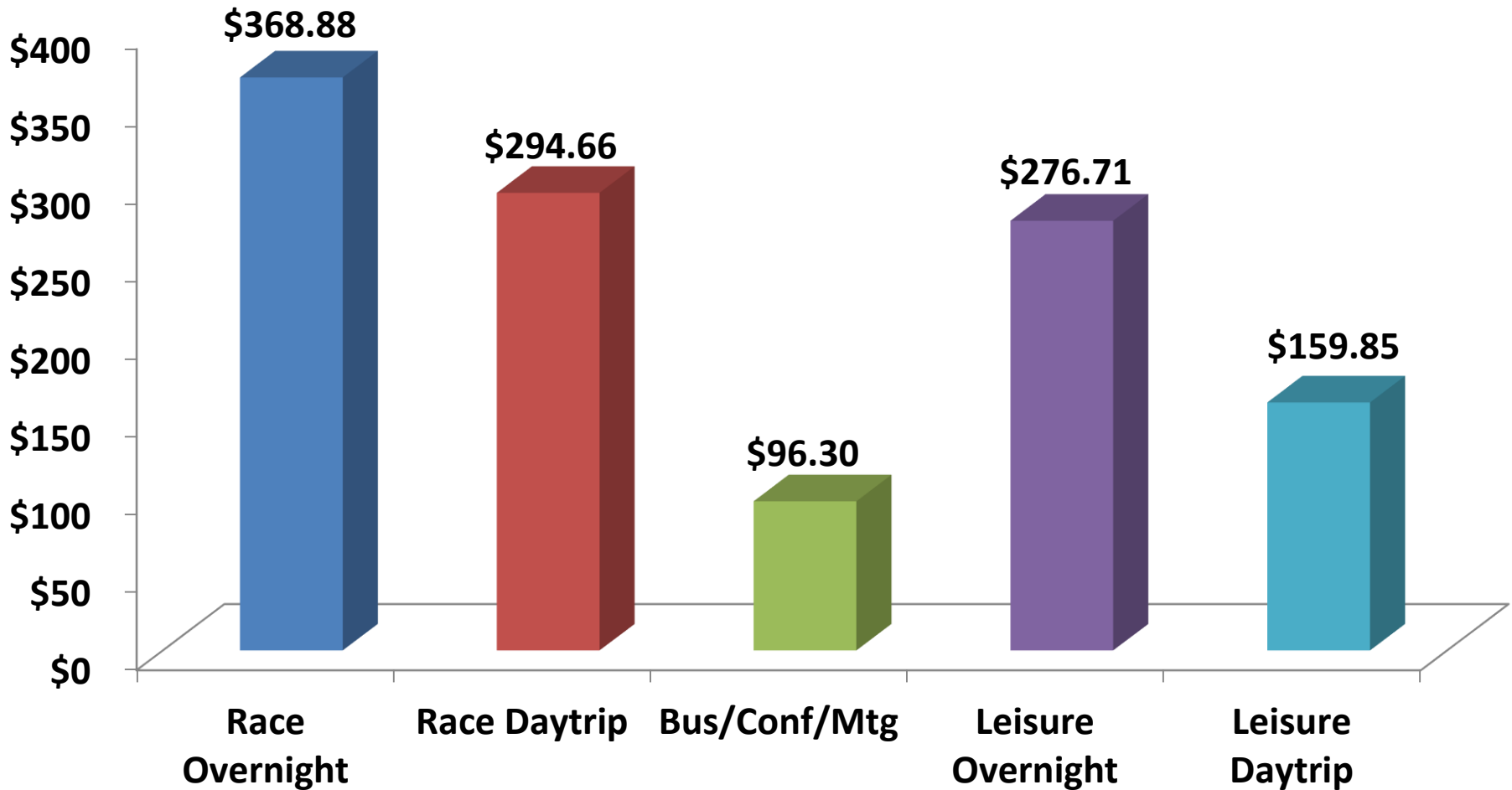
Food/Meals



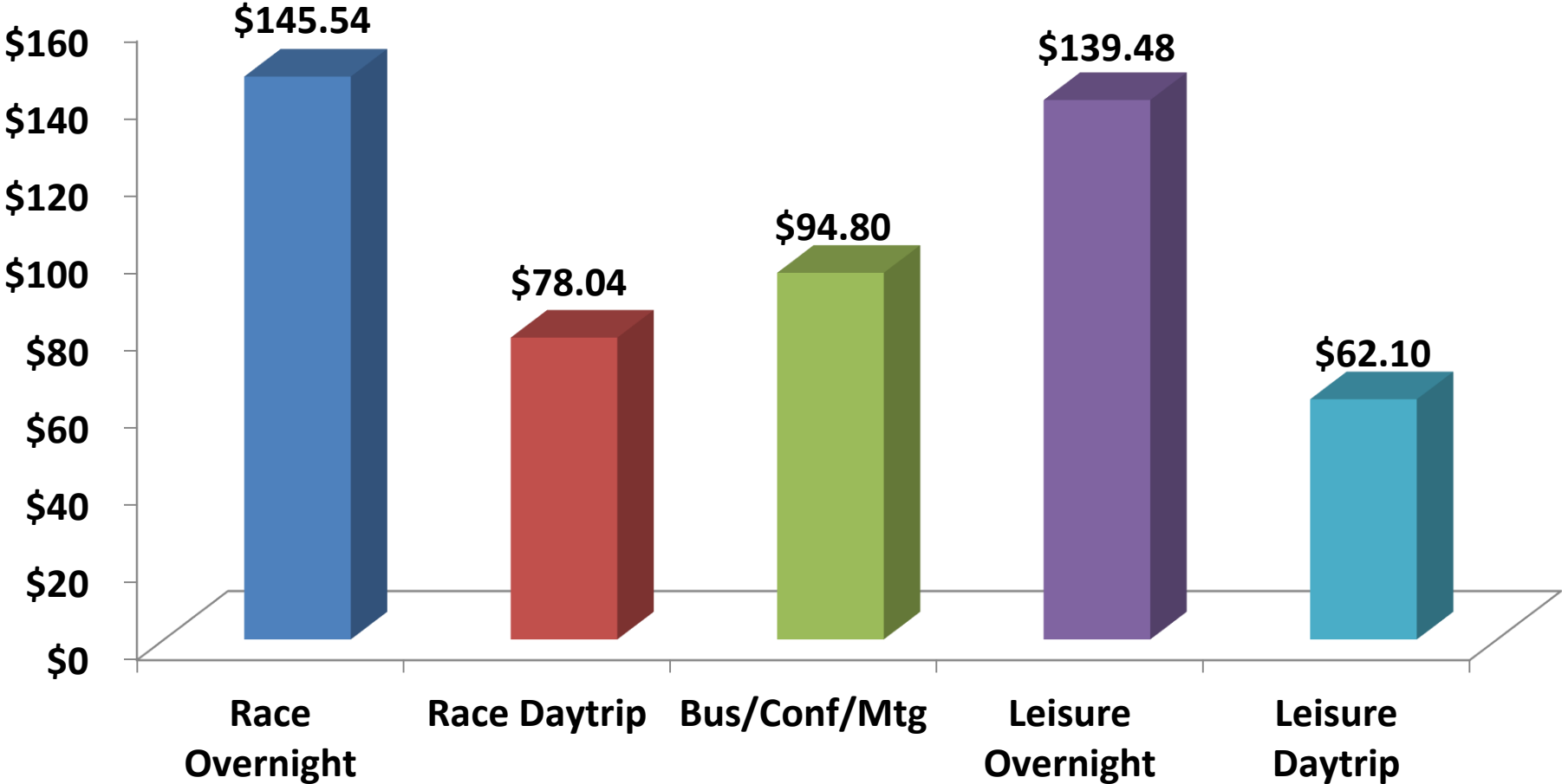
Shopping



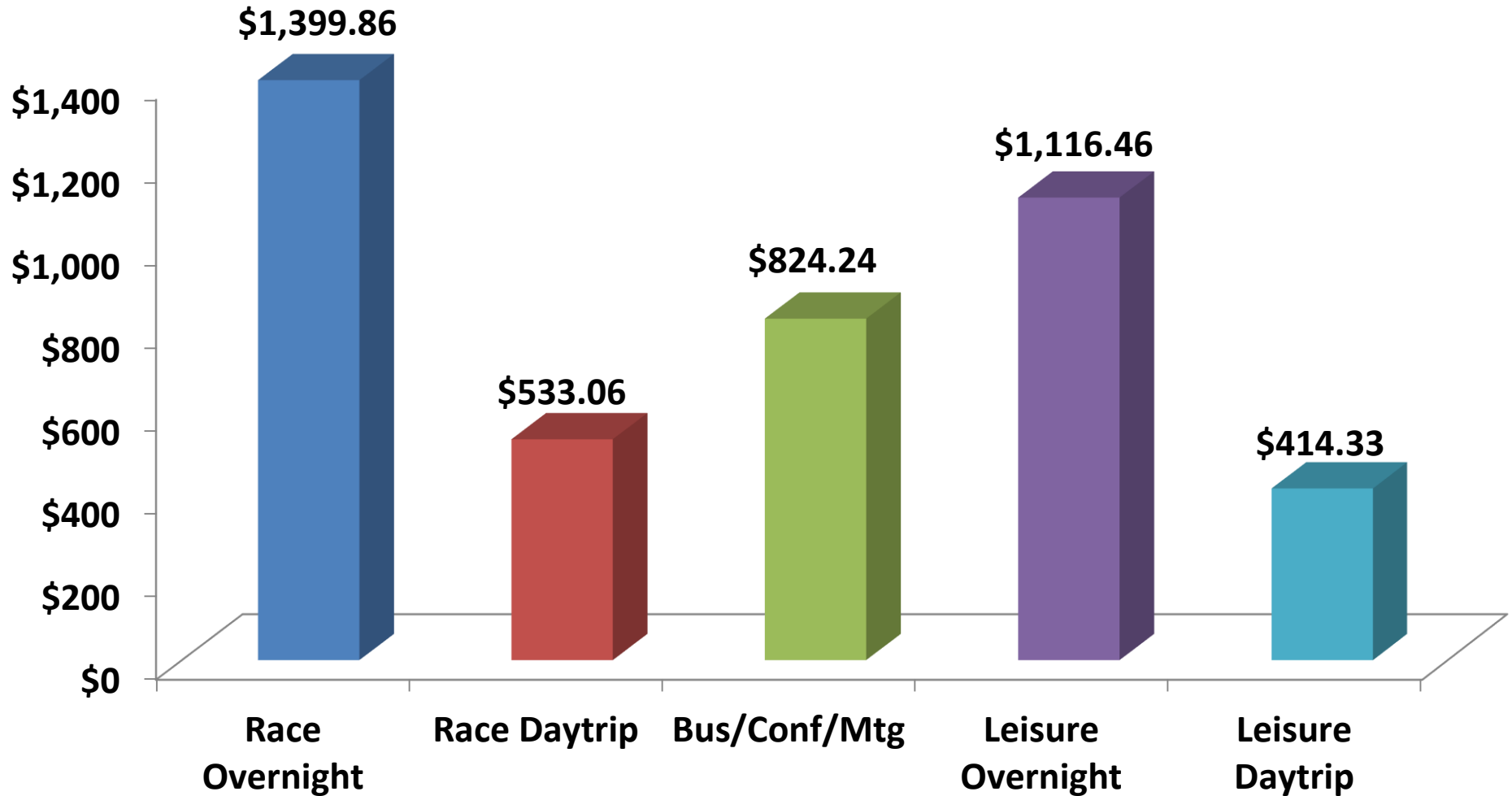
Attractions/Events



Auto Fuel



Total Party Spending





Cabarrus County Residents Survey





Resident Demographics

■ Occupation:

- 19.0% - Professional/technical
- 13.8% - Executive/manager
- 12.1% - Retired
- 12.1% - Secretary/clerk/office

■ Age:

- 62.5% - Generation X
- 23.8% - Baby Boomers
- 12.5% - Generation Y
- 1.3% - Silent Generation

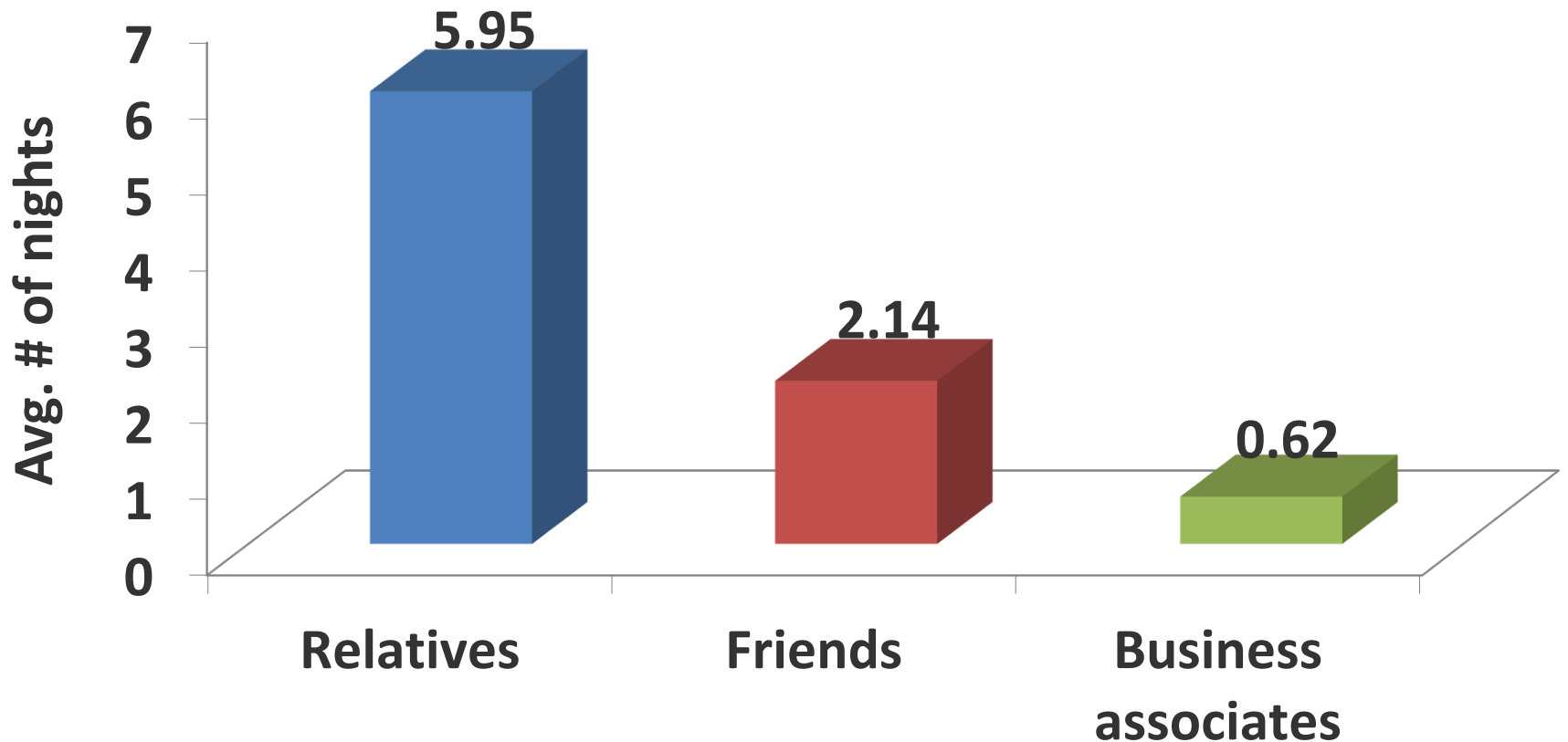
■ Gender:

- Female – 65%
- Male – 35%

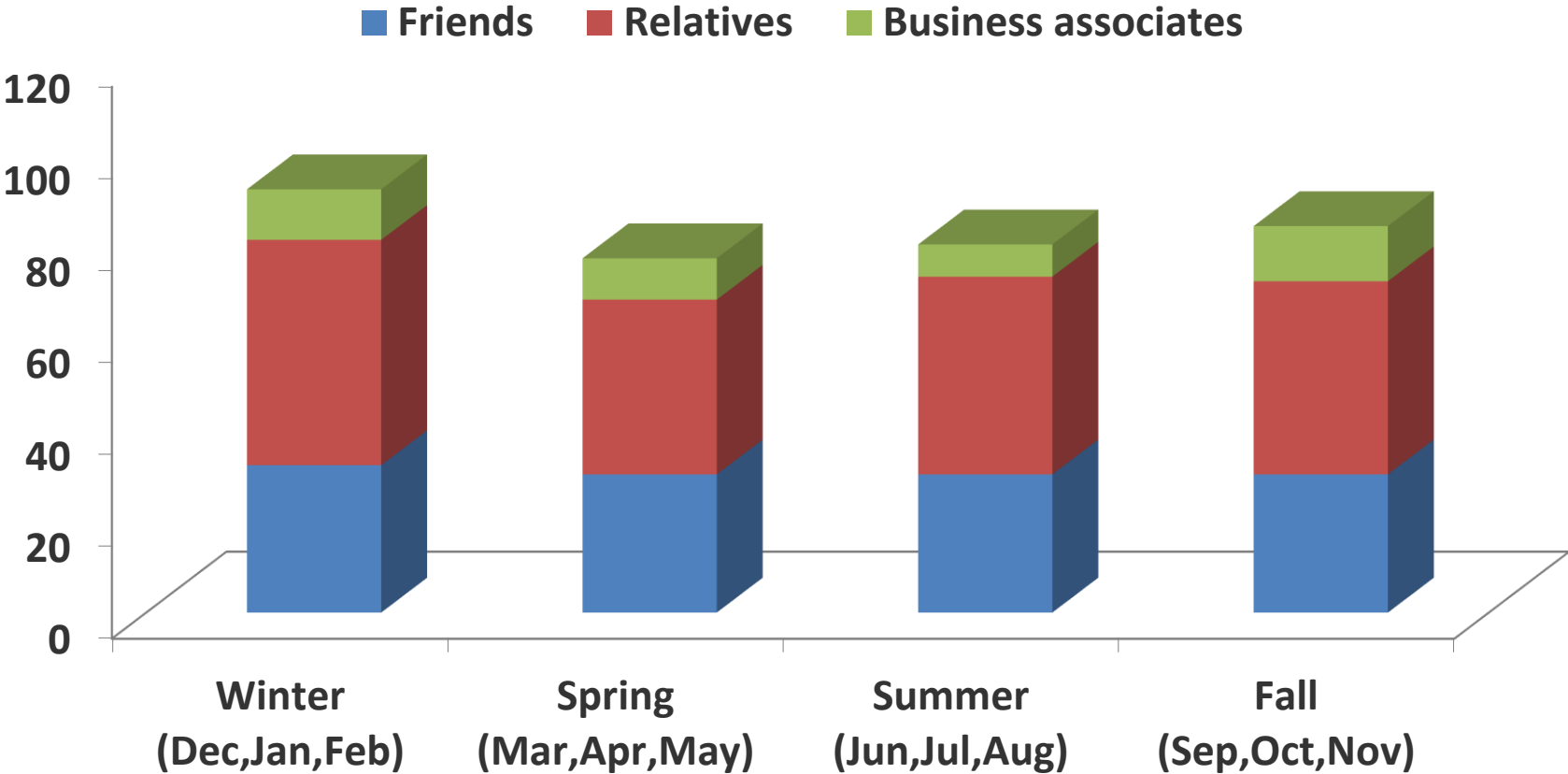
■ Level of education

- 43.8% - Some College
- 32.5% - College Degree
- 15.0% - High School Graduate
- 7.5% - Graduate School

What is the average number of nights your guests stay with you while in Cabarrus County? n=77



Think about friends, relatives or business associates who visited you in the last 6 months. In what season(s) did they visit? n=76



What is the average party size of visitors staying with you in your residence?

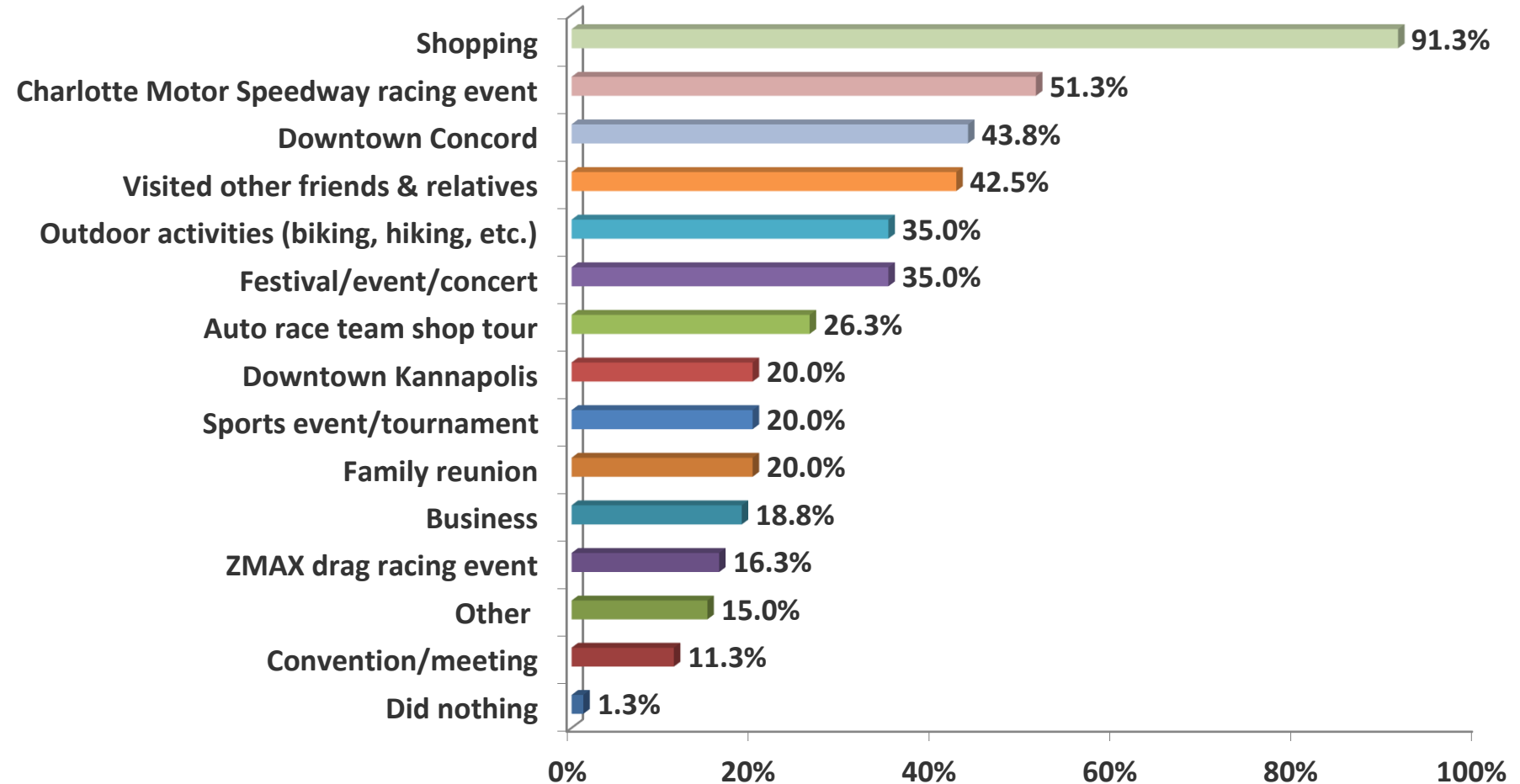
Adults

Answer Options	0	1	2	3	4	5	6	7	8+
Friends	13	9	28	2	3	1	1	0	2
Relatives	4	8	39	5	11	1	1	1	1
Business associates	30	6	3	0	0	0	0	0	0

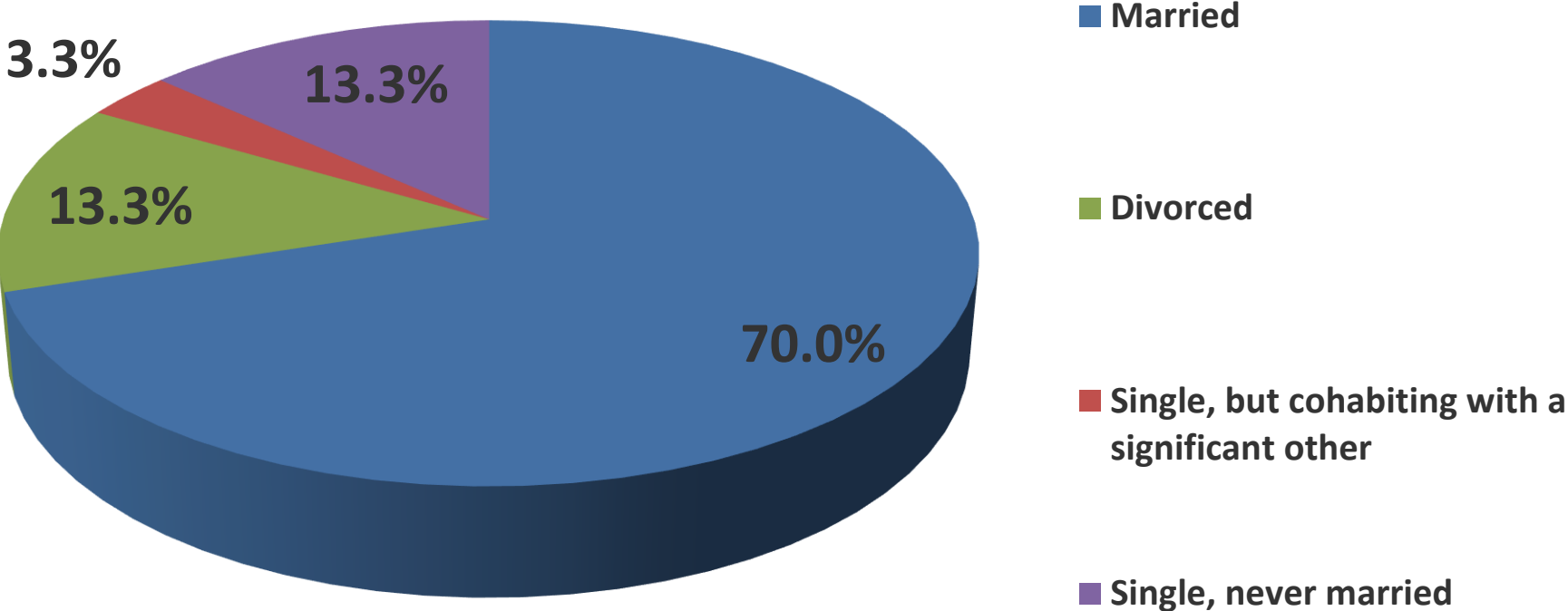
Children

Answer Options	0	1	2	3	4	5	6	7	8+
Friends	31	2	10	1	0	0	0	1	1
Relatives	18	2	19	6	2	1	2	0	2
Business associates	34	1	0	0	0	0	0	0	0

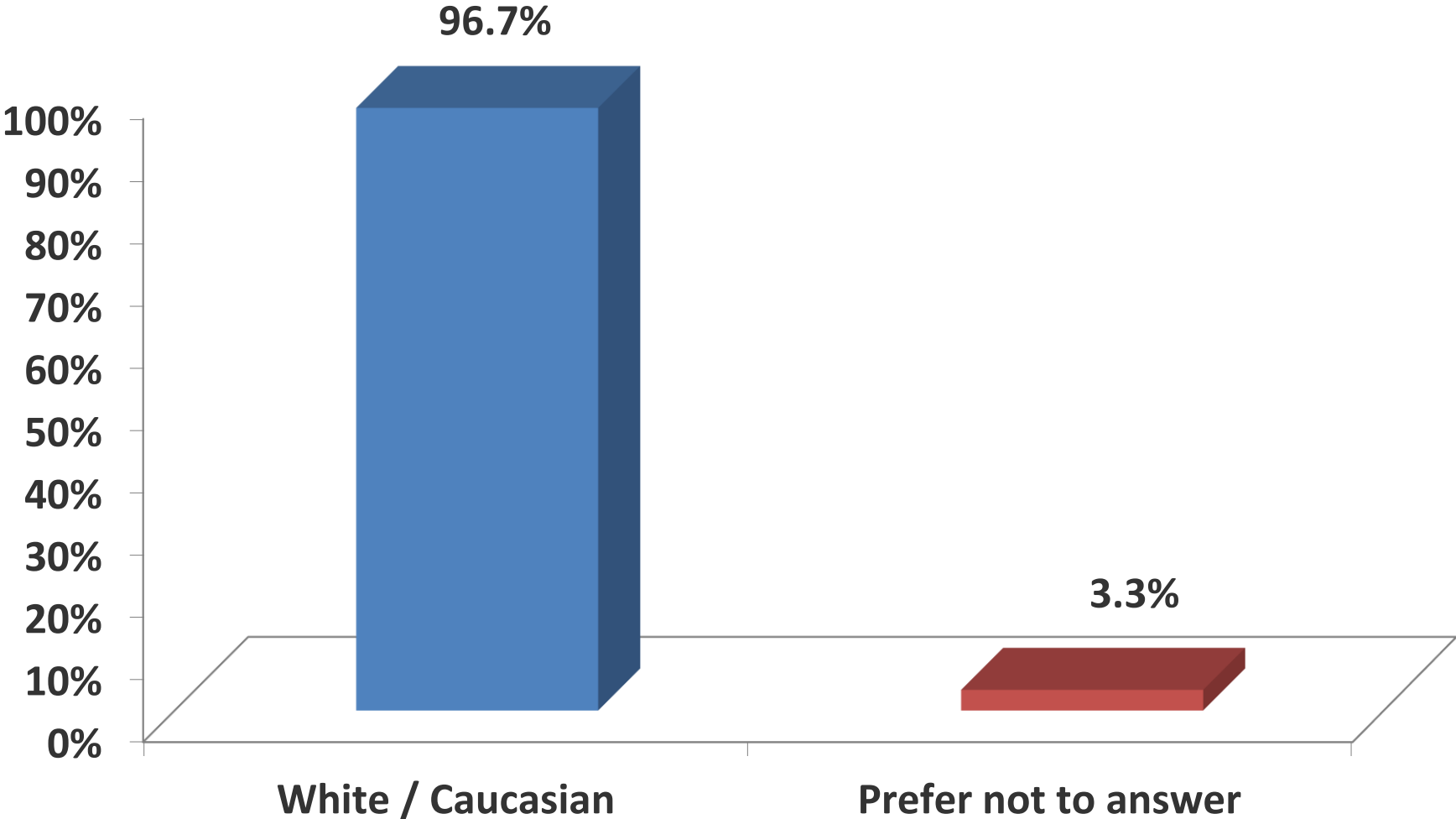
When visiting you, what other activities did your guests do? n=80



Please tell us your relationship status. n=30



Please tell us your ethnicity. n=30





Cabarrus County 2014 Visitor Economic Impact

2014 Cabarrus County Overnight Visitor Impact (no GWL)

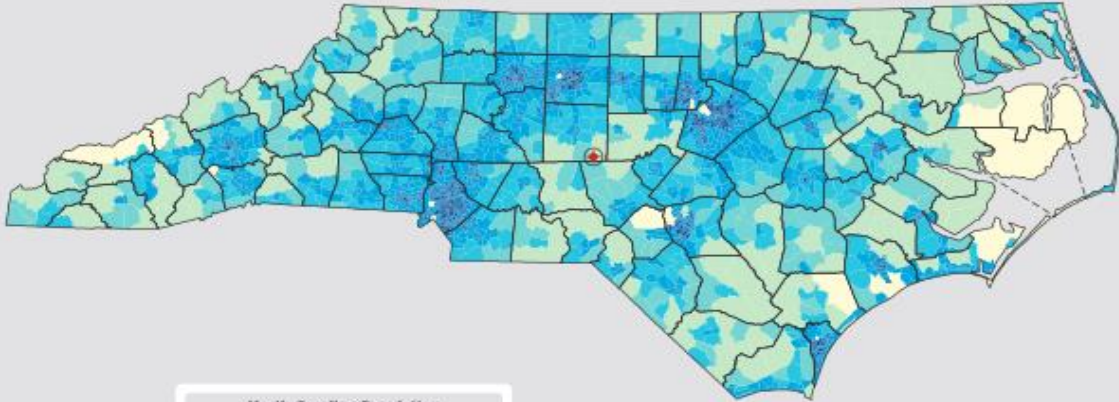
Response Category	Leisure	Business	Conference/ Group	Misc.
Percent of Rooms sold in 2014	20.6%	41.9%	30.7%	6.8%
Rooms Consumed (538,419)	110,914	225,598	165,295	36,612
Average Daily Spending (per party)	\$267.30	\$265.88	\$265.88	\$267.30
Total Spending	\$29,647,079	\$59,982,753	\$43,949,177	\$9,786,519
Overnight Visitor Spending	\$133,579,009			
Great Wolf Lodge				
Daytrip Spending				
Total 2014 Visitor Spending				

NOTE: NC Dept. of Commerce & US Travel Assoc. TEIM Spending for Cabarrus County = \$362,970,000.

Sources: STR Data without Great Wolf Lodge, YSI Survey of Cabarrus County Visitors

2010 Census: North Carolina Profile

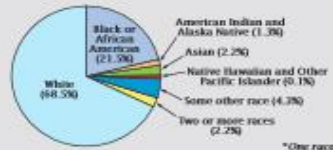
Population Density by Census Tract



North Carolina Population 1970 to 2010	
2010	9,535,483
2000	8,049,313
1990	6,628,637
1980	5,881,766
1970	5,082,059

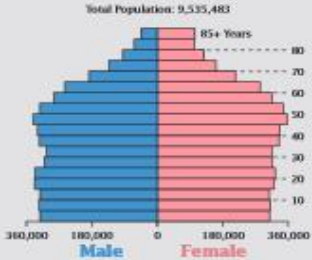
United States Census Bureau

State Race* Breakdown



Hispanic or Latino (of any race) makes up 8.4% of the state population.

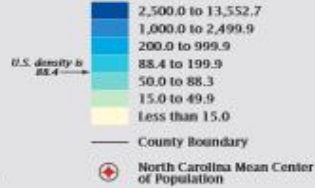
Population by Sex and Age



Housing Tenure

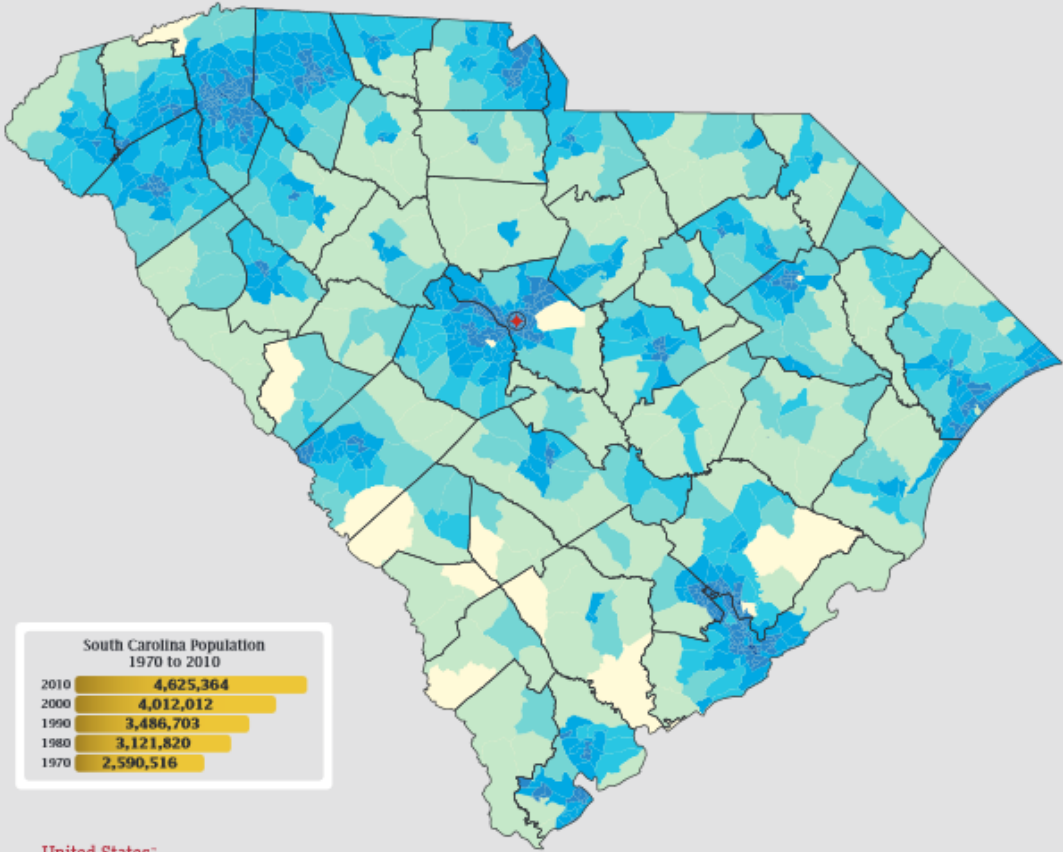


People per Square Mile by Census Tract

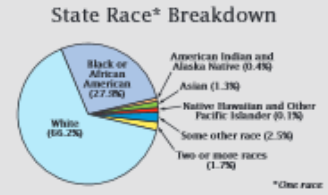


2010 Census: South Carolina Profile

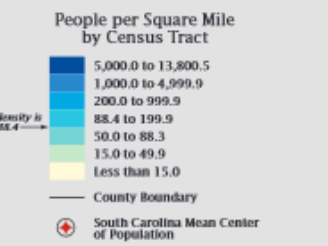
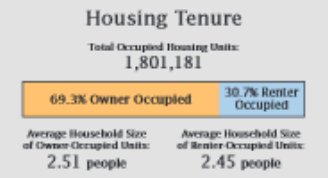
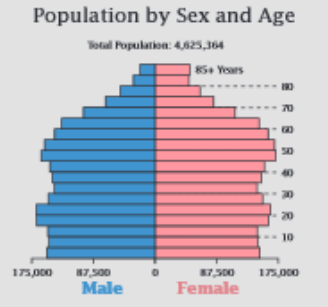
Population Density by Census Tract



2010	4,625,364
2000	4,012,012
1990	3,486,703
1980	3,121,820
1970	2,590,516



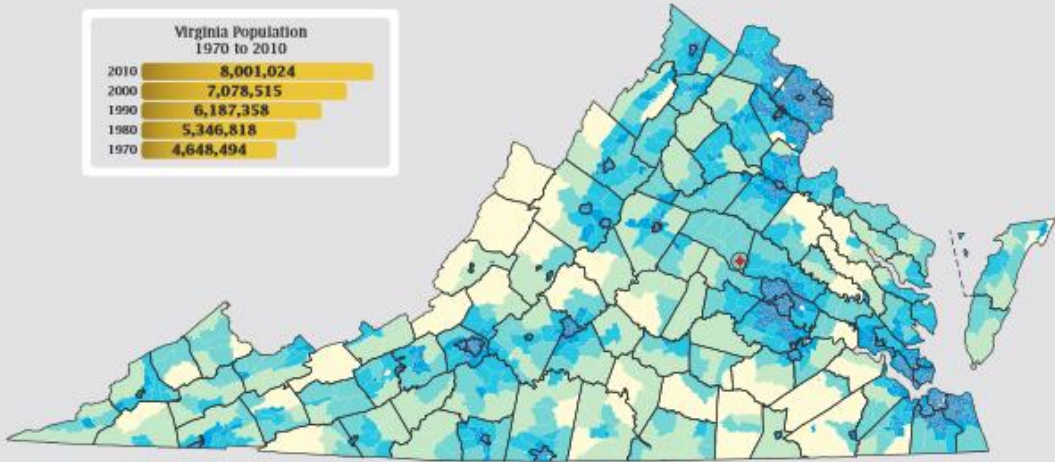
Hispanic or Latino (of any race) makes up 5.1% of the state population.



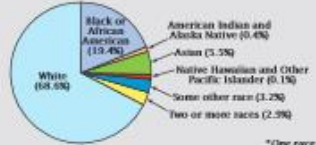
2010 Census: Virginia Profile

Population Density by Census Tract

Virginia Population 1970 to 2010	
2010	8,001,024
2000	7,078,515
1990	6,187,358
1980	5,346,818
1970	4,648,494

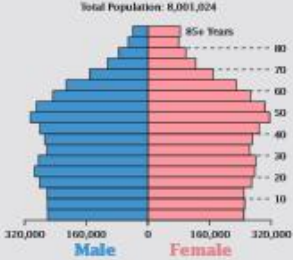


State Race* Breakdown



Hispanic or Latino (of any race) makes up 7.9% of the state population.

Population by Sex and Age



Housing Tenure



People per Square Mile by Census Tract



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