

Travel and Tourism Industry Study

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“Travel and tourism is the business to be in. This vast industry is on a fast growth track that impacts every industry segment. For Americans, this means more and better travel products.

For American communities, this means increased jobs and revenue”.

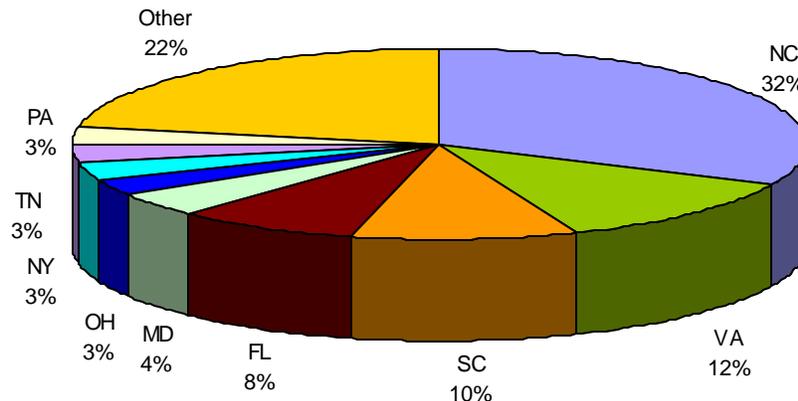
-William S. Norman, President and CEO of Travel Industry Association of America

The travel and tourism industry is indeed a large and growing industry comprised of businesses that provide lodging, dining, commercial recreation, transportation, retail and guide services. It is a unique industry because the public sector generally owns and promotes the resources and/or attractions that bring visitors to individual communities. It is then the role of the businesses in the private sector to provide quality products and services. North Carolina is an extremely popular destination for millions of business and pleasure travelers each year. The more a company knows about travelers and tourists, understands their needs and wants, and learns how to lure their business, the more profitable they will be.

I. Industry Size Estimate

In 1999, 44.5 million people visited the Tarheel state.¹ More than 50 percent of visitors (23 million) traveled to North Carolina’s Heartland Region; 26 percent (over 11 million people) visited the Coastal Region; and 24 percent (over 10 million people) visited the Mountain Region.² Most travelers in North Carolina came from close by. One third of all the trips taken within North Carolina were by North Carolina residents and another third originated from bordering states (SC, VA, TN, GA).

Travelers in North Carolina, 1999



Source: NC Department of Commerce

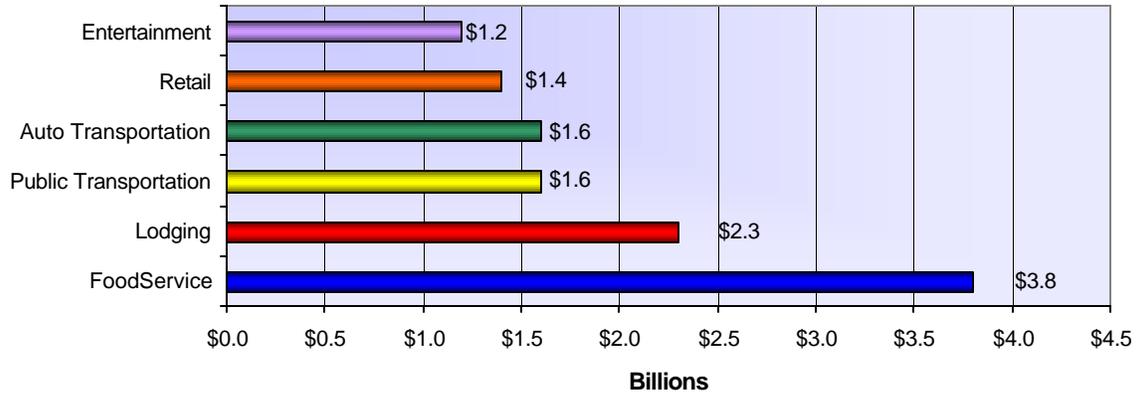
In-state and out-of-state travelers in North Carolina produced the twelfth highest domestic travel expenditures among the fifty states in 1999. North Carolina’s travel and tourism industry collected almost \$11.9 billion: \$11.4 billion from domestic travelers and \$472.4 million from international

¹ North Carolina Department of Commerce. Website: <http://www.nccommerce.com/tourism/econ/>.

² The Mountain Region consists of 23 counties from Alleghany, Burke, Caldwell, Rutherford and Wilkes on west. The Coastal Region consists of 29 counties from Bertie, Bladen, Columbus, Duplin, Lenoir, Martin, Northampton, Pender and Pitt on east. The Heartland Region consists of 48 counties between the Mountain and Coastal Regions.

travelers. Nearly a third of all travel spending, \$3.8 billion, went toward foodservice. Lodging expenses accounted for almost 20 percent of travel spending. Thirty-two percent of travelers in North Carolina in 1999 stayed in a hotel, motel or bed-and-breakfast.³

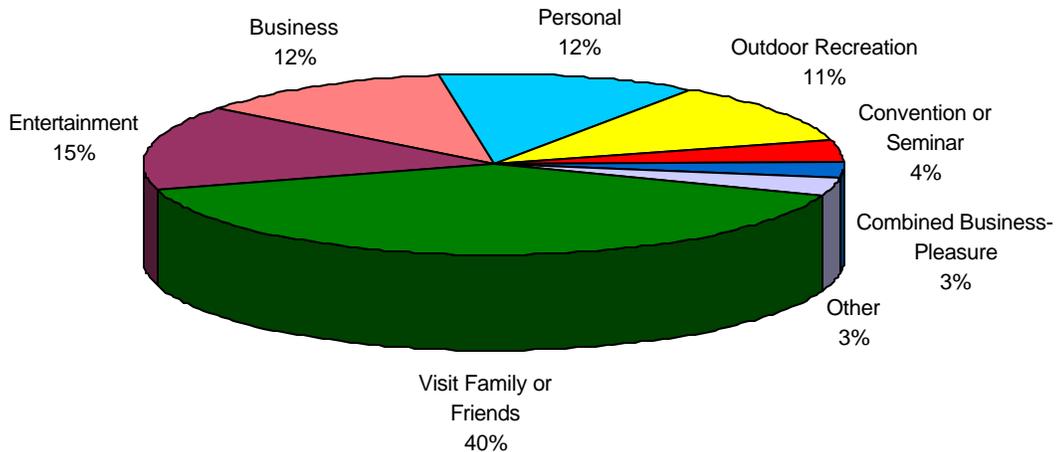
Travel Spending in North Carolina, 1999



Source: NC Department of Commerce

Forty percent of all trips in North Carolina in 1999 were to visit family or friends. Entertainment was the second most common reason for travel. Business, personal and outdoor recreation were other popular trips.

Primary Purpose of Trip in North Carolina, 1999



Source: TIA's TravelScope

North Carolina's beautiful and diverse landscape continues to be a dominant attraction for visitors. Most of the top tourist destinations in 1999 were outdoor parks and recreation facilities. North Carolina's Blue Ridge Parkway was by far the most popular attraction in the state, drawing nearly 21.8 million people. North Carolina's state park system and Great Smoky Mountain National Park each drew over 10 million visitors. Carowinds Theme Park in Charlotte was the most visited private attraction in the state.

³ Travel Industry Association of America. Website: <http://www.tia.org/Travel/domesres.asp>.

Top 20 Tourist Attractions in North Carolina, 1999

| Attraction | Attendance |
|--|--------------------|
| Blue Ridge Parkway | 21,779,102 |
| North Carolina State Parks (33 combined) | 12,916,212 |
| Great Smoky Mountain National Park | 10,283,600 |
| Cape Hatteras National Seashore | 2,772,420 |
| Carowinds Theme Park | Data Not Available |
| Kerr Lake State Recreational Area | 1,614,424 |
| Asheville Farmer's Market | 1,514,518 |
| Fort Macon State Park | 1,260,754 |
| Jordan Lake State Recreational Area | 1,221,738 |
| Lowe's Motor Speedway | Data Not Available |
| Biltmore Estate | Data Not Available |
| Guilford Courthouse National Military Park | 740,024 |
| North Carolina Zoological Park | 660,447 |
| North Carolina Historic Sites (combined) | 614,647 |
| Mount Mitchell State Park | 592,000 |
| North Carolina Aquariums (combined) | 497,925 |
| Wright Brothers' National Memorial | 377,871 |
| Fort Raleigh National Park | 306,649 |
| Chimney Rock Park | Data Not Available |
| Grandfather Mountain | Data Not Available |

Source: NC Department of Commerce

II. Growth

Travel⁴

North Carolina is becoming increasingly attractive to travelers and it shows in the growth in tourism expenditures over the last decade. In 1990, domestic travelers spent approximately \$6.5 billion in North Carolina. In 1999, that figure stood at \$11.4 billion, a 75 percent increase over ten years.

⁴ North Carolina Department of Commerce. Website: <http://www.nccommerce.com/tourism/econ/>.



Source: NC Department of Commerce

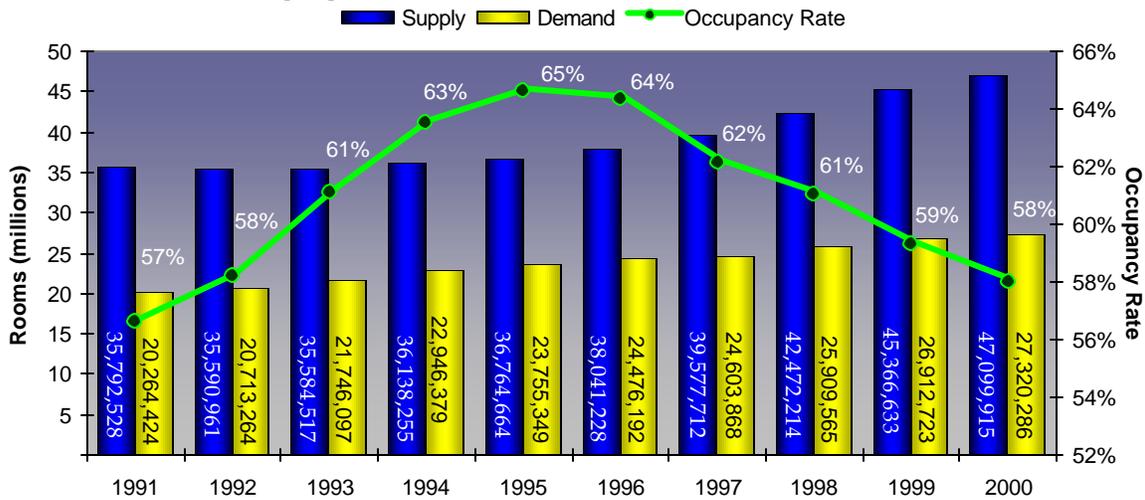
Every county in North Carolina experienced some degree of growth in tourism dollars over the last five years. See *Appendix A* for a list of travel expenditures by county from 1995 to 1999. Mecklenburg County has been the dominant recipient of tourism dollars over the last half decade. Between 1995 and 1999, expenditures in Mecklenburg County's grew from \$2.0 to \$2.5 billion, accounting for no less than 21.5 percent of the state's total during any those years. Tourist spending increased the most, by percentage, in Currituck County - spending grew from \$38.0 million to \$70.3 million (an 85% increase) during this period.

Lodging

Over that last decade, the supply of lodging rooms in North Carolina has grown 32 percent. The growth in rooms did not quite keep pace with the rising demand of travelers. Thirty-five percent more rooms were occupied in 2000 than were in 1999.⁵

⁵ Smith Travel Research and the NC Hotel & Motel Association, "North Carolina Lodging Facts: The last Ten Years at a Glance." 2001.

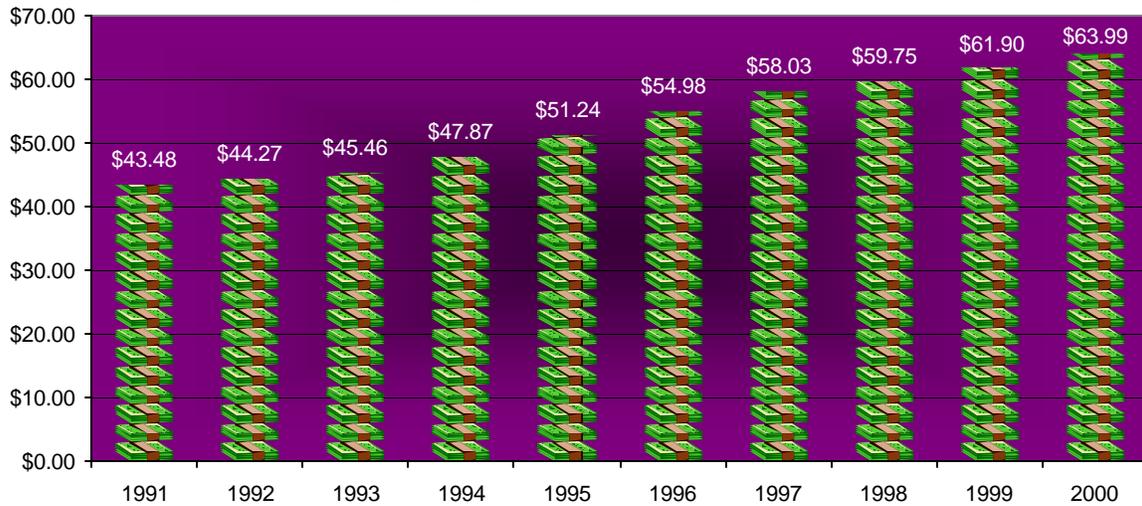
NC Lodging Supply, Demand & Occupancy Rate, 1991-2000



Source: Smith Travel Research and the NC Hotel and Motel Association

During the mid 1990's, lodging demand was quickly out-gaining the number of available rooms. Room occupancy rates rose from 57 percent in 1991 to 65 percent in 1995 before the supply began to catch up. In 2000, the occupancy rate of North Carolina lodging rooms resembled early 1990's figures – 58 percent. The average daily room rate in North Carolina grew 47 percent over the last decade, moving from \$43.48 in 1991 to \$63.99 per night in 2000. Rates increased over five percent per year between 1994 and 1997, when occupancy rates were the highest.⁶

Average Daily Room Rate in NC, 1991-2000



Source: Smith Travel Research and the NC Hotel and Motel Association

⁶ Smith Travel Research and the NC Hotel & Motel Association, "North Carolina Lodging Facts: The last Ten Years at a Glance." 2001.

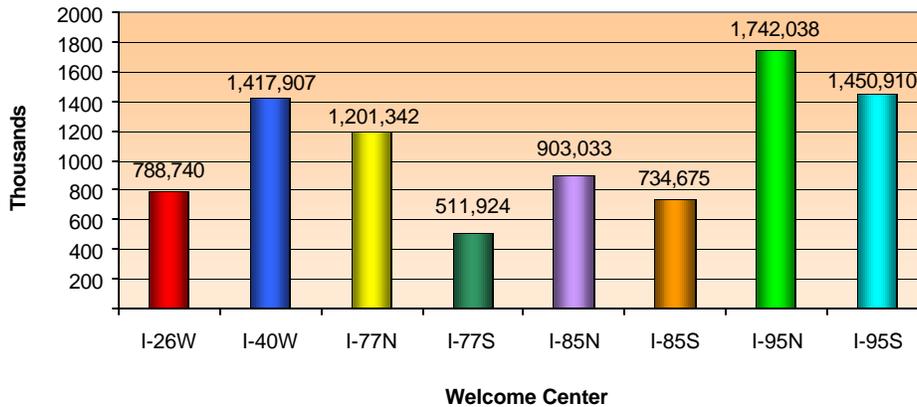
III. Structure

Catching Up With Travelers

The structure of the travel and tourism industry is a unique one. In many cases, the public sector owns the natural resources or cultural attractions that draw visitors to an area. It is essential for the public and private sectors to work together to create a positive experience for the traveler. Working together to create marketing plans or special promotions can be beneficial to both groups.

One location where travelers, government and private business come together is at a visitors center. North Carolina operates eight Welcome Centers along its state borders and directly off the five interstate highways. State government provides weary travelers a place to stop, rest and learn a little about what North Carolina has to offer. Private businesses can display and/or distribute information about their products, services and events to the millions of incoming visitors who pass through each year. In 2000, 8.75 million travelers stopped at one of the eight centers. See *Appendix B* for the brochure policy for NC Welcome Centers.

Welcome Center Attendance, 2000



Source: NC Department of Commerce

Private businesses can also reach a large number of travelers at public airports. As of 1996, North Carolina had three of the top 100 busiest airports for passenger travel in the country. Charlotte-Douglas International Airport (CLT), Raleigh-Durham International Airport (RDU) and Piedmont Triad International Airport (PTI) handle most of the passenger air traffic in and out of the state. In 1999, over 21.4 million passengers traveled in and out of Charlotte/Douglas.⁷ RDU served 8.4 million passengers⁸ and PTI served 2.7 million.⁹

Most tourists do not blindly select an area to visit and go. Newspapers, the Internet, television and magazines all influence travelers' decisions where to go and what to do. A recent survey by the Travel Industry Association of America found that half of all travelers nationwide use some sort of travel media to assist them in planning their vacations. Twenty-eight percent cited newspaper travel

⁷ Web site: www.charlotteairport.com.

⁸ Web site: www.rdu.com.

⁹ Craver, Richard, "Passenger Volume Grows 3 Percent at Greensboro, N.C.-Area Airport". *High Point Enterprise*. March 1, 2001.

sections for trip ideas and suggestions. Twenty-one percent used Internet web sites and another 21 percent referred to travel shows on television.¹⁰

Travel Mediums Used by Tourists to Plan Trips*

| | |
|--|-----|
| Newspaper travel section | 28% |
| Internet web site | 21% |
| Travel show on television or cable | 21% |
| Motor club magazine, such as AAA | 18% |
| Consumer lifestyle magazines | 17% |
| News magazines | 12% |
| Consumer travel magazine | 12% |
| Membership publication | 12% |
| Travel Guidebook | 11% |
| In-flight magazine from an airline | 10% |
| A travel trade or business publication | 10% |
| An electronic or e-mail newsletter | 9% |

*Multiple responses allowed
Source: TIA

Substitute Products

There are many options available to travelers for entertainment, lodging and food while on vacation or a business trip. Businesses in the travel and tourism industry are competing not only against each other, but also against natural resources such as beaches, mountains, etc. which are located in other areas. Products and services of exceptional quality are expected from all businesses in the community. Travel and tourism businesses must strive to provide this excellent quality in order to prevent travelers from choosing other communities to visit in lieu of theirs.

¹⁰ Travel Industry Association of America. "New survey on travel media finds that Internet travel sites are most useful to travelers," June 12, 2000.

Effective marketing plans must be created and implemented and broad community support must exist to successfully attract visitors to a city, state or county. In many communities, economic development plans include the devotion of resources to improve the travel and tourism industry for a particular area. Knowledge of, and participation in, these plans by business owners should improve the likelihood of a successful outcome.

IV. Trends

Lodging

To B&B or Not to B&B

There has been an increase in bed and breakfasts (B&B's) in the nation over the last decade. Many people enjoy the interaction with the owners and a growing number of women find security in this set-up. Because B&B's are small, the money generated by these inns is usually only supplemental to the owner's income. Large, industry leaders have started catering some of their services to include the "bed and breakfast" concept. For example, many operations include a complimentary breakfast with lodging in an attempt to imitate the offerings of a B&B.

Independent motel owners are experiencing intense competition from franchised motels. Large chains use their strong marketing power to stay ahead in the industry. Owners of small, independent motels can participate in independent inspections and rating programs (AAA, etc.) to indicate their willingness to provide high quality accommodations.

Wiring Guests to Their Rooms

The Internet has not only affected how travelers make travel plans and place reservations but has also affected where they choose to stay. According to the American Hotel and Motel Association, 59 percent of business travelers desire computers, Internet access and printers in their rooms. Many hotels are "wiring" their guests with a computer and the Internet and charging between \$8 and \$20 per day for the service.¹¹

Hotels, motels and bed and breakfasts are moving beyond just offering web access through computers, in-room televisions and dataport connections. The growing trend is to offer high-speed Internet. The consulting firm Arthur Andersen reports that at least 57 percent of U.S. hotel rooms are currently wired for Internet access. Only twenty percent of hotels have high-speed access though. More than 40 percent say they are working on establishing high speed Internet in all guest rooms and should have it in place within two years. An additional 13 percent of hotels are planning to establish high-speed access in the future but have no timetable in place.

High-speed web access can cost about \$200 per room to install. Some companies that provide the systems will take care of the upfront costs in return for some of the profits generated from guest usage. Generally, hotels charge \$8 to \$10 dollars for 24 hours of high speed Internet access.¹²

A Many Amenities¹³

Increased competition has forced the hotels, motels and bed and breakfasts to upgrade their offerings and amenities to lure customers. Some have offered free gifts like golf caps, t-shirts, locally produced wine, books and disposable cameras. Other businesses have added to their services such as offering twice-a-day maid service, providing cell phones to use rather than in-room

¹¹ American Hotel & Motel Association. "Hot Topics for 2000." Website: http://webprod.ahma.com/ahma/media/hot_topics.asp.

¹² Katz-Stone, Adam, Triangle Business Journal. "Avoiding Communications Logjam." May 19, 2000. v.15, i.38, pp. 26-27.

¹³ American Hotel & Motel Association. "Hot Topics for 2000." Website: http://webprod.ahma.com/ahma/media/hot_topics.asp.

phones, including pet-friendly services and improving their work-out area to include more comprehensive health facilities.

Technology has allowed small hotels to provide services that were once only offered by luxury hotels. Computer systems now enable businesses to easily track repeat guests' preferences. Computer software can record everything from room and bed preferences to mini-bar usage to allow management to provide more personalized service.

Business Travel¹⁴

More than one out of five adults in the U.S. made at least one business trip in 1998. The 43.9 million business travelers is a 14 percent increase from 1994. The South Atlantic states draw the largest percentage of business travelers of any region in the country. One-quarter (25%) of all business trips were to North Carolina, Delaware, Washington D.C., Florida, Georgia, Maryland, South Carolina, Virginia or West Virginia.

Eighty-four percent of business travelers spent at least one night away from home on their most recent trip. The majority of these trips included a hotel/motel stay. Nearly three-quarters of all business travelers (74%) spent a night in a hotel/motel. The average trip in 1998 lasted 3.3 nights.

Travel in Cyberspace¹⁵

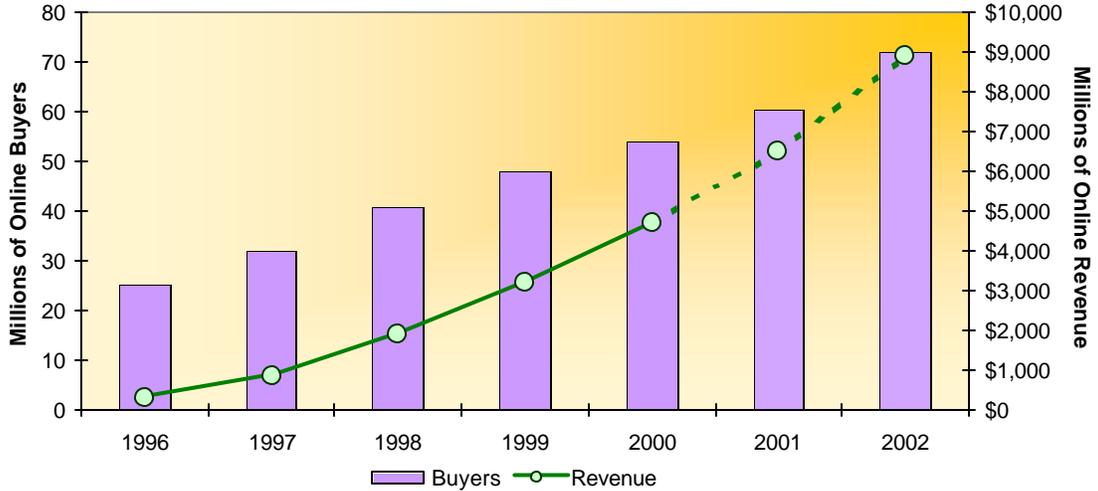
The Internet has changed how people travel. No longer is it necessary to spend hours on the telephone calling travel agents, hotels, airlines, rental car companies and so on trying to find the best fare and make reservations. In fact, no longer is it necessary to pick up the phone at all to plan a trip. The number of online travel buyers has increased from 25.3 million people in 1996 to 54.2 million in 2000.

This growth in online travel buyers has produced an explosion of sales. In 1996, the total online travel market created \$276 million in revenue. In 2001, that number is expected to reach \$6.5 billion – a 2,250% increase in five years. Hotel and rental car purchases only accounted for 11 percent of all online travel revenues in 1996 (\$31 million). They are projected to account for nearly 27 percent (\$2.4 billion) by the end of 2002.

¹⁴ Travel Industry Association of America. "Domestic Research: Business Travel in 1999". Website: <http://www.tia.org/travel/businesstravel.asp>.

¹⁵ Travel Industry Association of America. "Domestic Research: Internet Use for Travel". Website: <http://www.tia.org/travel/internetuse.asp>.

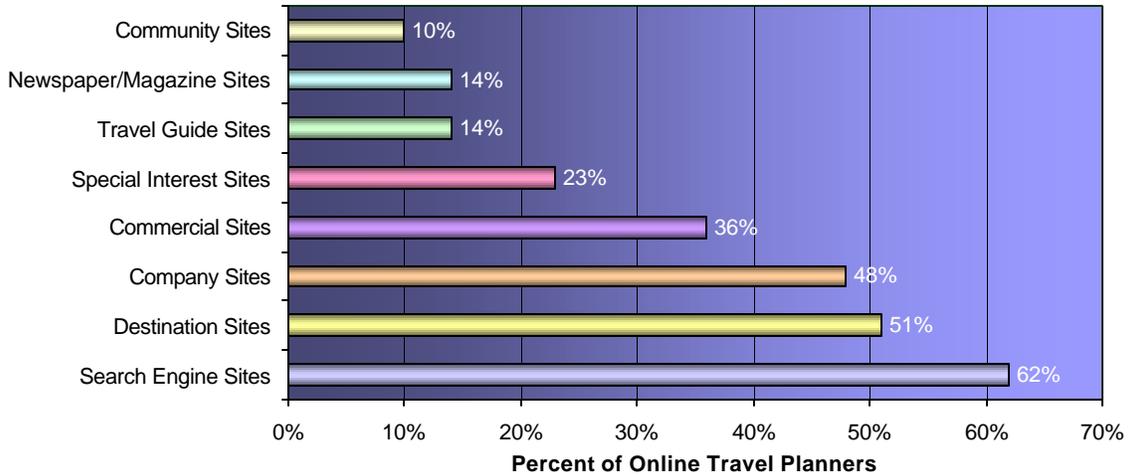
Total Online Travel Buyers and Travel Market Revenue, 1996-2002



Source: TIA

Sixty-two percent of Internet travel planners use search engine sites to make their travel plans. Destination and company websites were also popular online travel sources, used by roughly half of all Internet travel planners.

Types of Internet Sites Used for Travel Planning



Source: TIA

Heritage Tourism

Heritage Tourism is an increasingly popular activity for travelers seeking to experience the natural, cultural and historic resources of an area. It is one of the fastest growing travel categories, growing 10 to 15 percent annually. In 1996, heritage tourism attracted 65.9 million Americans. In 1998, that number rose to 92.5 million and in 2002 the number of heritage tourists is projected to reach 130 million.¹⁶ Approximately 53.6 million heritage tourists visited a museum or historic place on at least

¹⁶ NC Department of Commerce, Heritage Travel Program.

one trip in 1996. Cultural events or festivals were attended by 33.0 million traveling adults during that time: 20.7 million people visited museums and historic attractions.

The average heritage tourist is 48 years old, married (70%), well educated (54% hold college degrees) and has a high discretionary income (median income is over \$60,000 a year). Travelers attending a heritage or cultural activity also spend more on trips - \$615 per trip, on average, compared to \$425 for traditional travelers in 1996. They also take longer trips, participate in more activities and stay in more hotels and motels when traveling.¹⁷

Adventure Travel

Sun bathing on a coastal beach and strolling through an art museum are very popular activities for travelers. However, millions of Americans crave bolder and more exciting vacations. Many vacationers would rather drive cattle across the plains, like in the movie *City Slickers*, or rough-it in the forest, a la *Survivor*, than spend their time at a theme park or luxury hotel. Those people who yearn to scale rocky cliffs, kayak whitewater rapids and parachute from airplanes are the ones who have driven the adventure tourism industry to become one of the fastest growing travel sectors today, growing seven to eight percent per year.¹⁸ The Adventure Travel Society estimates that the adventure tourism industry generates \$110 billion annually and includes 10,000 adventure tour companies.¹⁹

According to the Travel Industry Association of America (TIA), half of all American adults (98 million people) took at least one adventure trip between 1992 and 1997. Not all adventures need to be death defying or extreme. Adventure travel activities are generally divided into two categories: *hard adventure* and *soft adventure*. The TIA lists mountain climbing, skydiving, whitewater rafting, kayaking, scuba diving and spelunking (cave exploring) as hard adventure activities. Soft adventure activities include camping, hiking, biking, sailing and horseback riding.²⁰ About 94 percent of adventure travelers between 1992 and 1997 took at least one soft adventure trip and 32 percent took at least one hard adventure trip. Twenty-five million Americans (26% percent of adventure travelers) took both types of trips.²¹

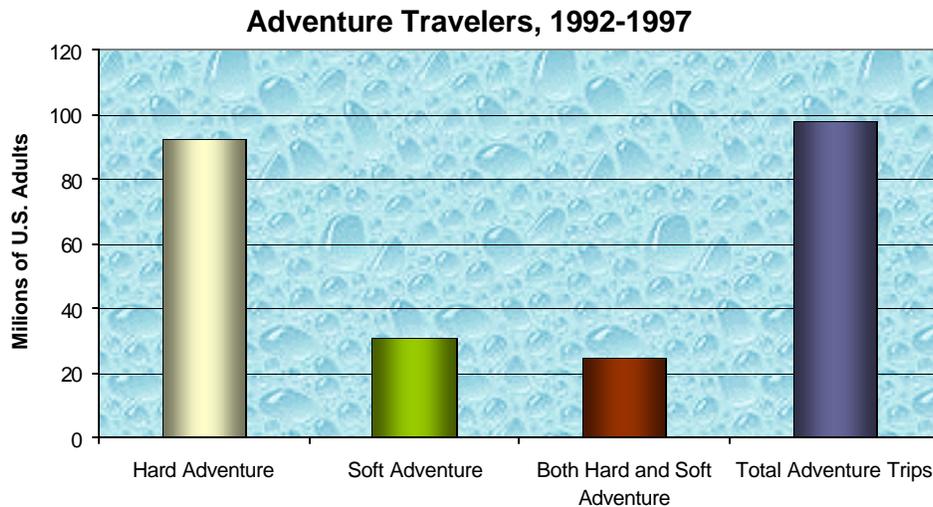
¹⁷ Travel Industry Association of America, News Release, [Online](August 11, 1997), Available URL: <http://www.tia.org/press/0807culture.stm>).

¹⁸ Volgenau, Gerry. "A hunger for adventure travel: New industry segment is its fastest-growing," *Detroit Free Press*. March 17, 2000.

¹⁹ Beeh, Jenny E. "Adventure vs. ecotourism." *E Magazine: The Environmental Magazine*. May/June, 1999. v. 10, i. 3, pp 46-47.

²⁰ Lasley, Paul and Harryman, Elizabeth. "Adventure? Travelers want more," *Christian Science Monitor*. July 20, 1999.

²¹ Lyon Andruss, Paula. "PR gets adventurous with travel industry," *Marketing News*. November 6, 2000, v. 24, is 23, pp. 4-5.



Source: Marketing News

Gas Prices

Rising gas prices had little effect on the summer travel season for most travelers in 2000. Roughly, 87.6 million adults took a trip by car in May, June and July 2000, despite the change in gasoline price. Seventy-eight percent of these travelers said that prices did not have an effect on their travel plans. Only six percent reported taking fewer trips because of gas prices. Most of those who altered their trips shortened the length of their trip (23%) or shortened their trip distance (22%).²²

V. Customer Information

National

Age

Baby boomers (35 to 54 year-olds) accounted for the largest percentage of American travelers, taking more than 259 million trips in 1999. Boomers spend more per trip (\$460 on average, excluding transportation) than any other age group. They also are more likely to stay at a hotel/motel (60%), take business trips (35%) and travel by plane (26%).²³

The fastest growing population of travelers is Seniors/Matures. Mature travelers took 31 percent more trips in 1997 than they did five years earlier. The entire travel market only increased 19 percent during that time.²⁴ Matures take longer trips than all other age groups – staying 3.9 nights on average. Travel spending among Matures is on the rise. Travelers in this group spent \$431 per trip on average in 1999 (up 10.5% from 1994). Mature travelers are more technologically savvy than they were five years ago: 48 percent reported owning a computer in 1999 compared to 24 percent in 1994.²⁵

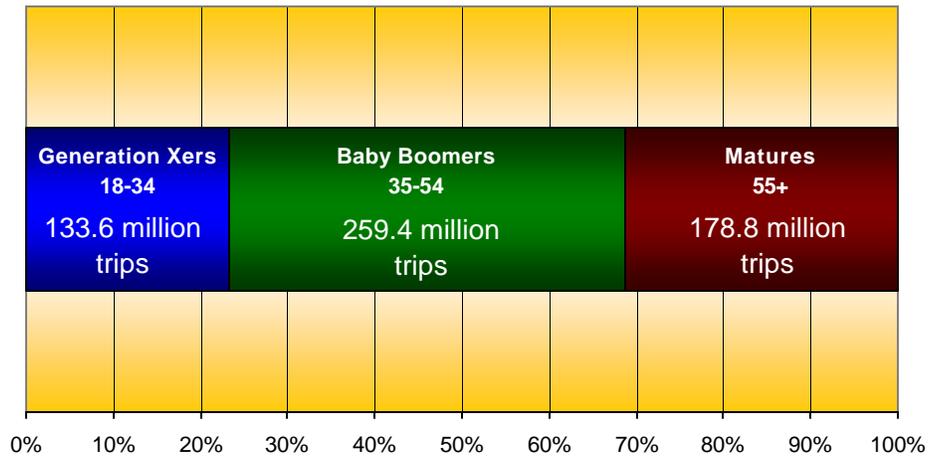
²² Travel Industry Association of America, "High gas prices had little effect on summer travel," [Online(August 3, 2000) Available URL: www.tia.org/press/083000gas.asp].

²³ Travel Industry Association of America. Baby boomers generate highest travel volume in U.S.," [Online (July 7, 2000) Available URL: www.tia.org/press/070700tmr.asp].

²⁴ American Hotel & Motel Association. "Hot Topics for 2000." Website: http://webprod.ahma.com/ahma/media/hot_topics.asp.

²⁵ Travel Industry Association of America, Press Release: "Mature travelers comprise nearly one-third of all U.S. travel." January 22, 2001. Available Online: <http://www.tia.org/press/012201mature.asp>.

Trips Taken by Age Group, 1999

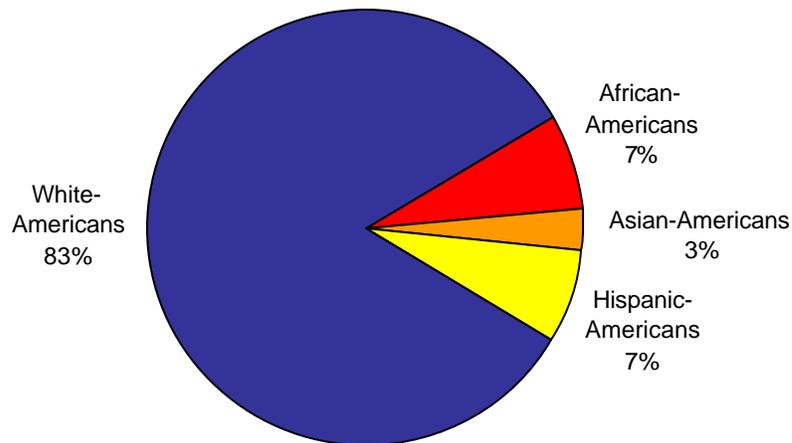


Source: TIA

Race/Ethnicity²⁶

Minorities generated 17 percent of all trips taken in the US in 1999. Total person-trips for all Americans reached 1.01 billion (up 1% from 1997's total). Minority Americans took a much larger percentage of trips in 1999 than in 1997. African-American, Asian and Hispanic travel volumes increased 16 percent, 7 percent and 11 percent respectively.

Trips Taken by Racial Group, 1999

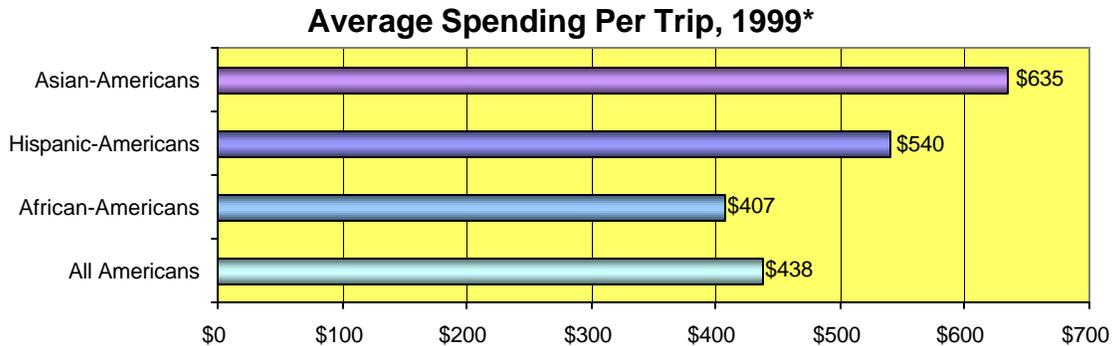


Source: TIA

Many trip characteristics are similar amongst all racial groups. Pleasure travel accounts for most of the trips by Americans. The majority of these trips are to visit family or friends. Entertainment is the second most common reason for pleasure travel. Most travel is done by automobile, with two people traveling per trip, and includes at least one overnight stay. For all races, the most common activity while away from home is shopping.

²⁶ A trip is defined by the TIA as 50 miles or more one way away from home.

Americans spent an average of \$438 per trip, excluding transportation, in 1999. Asian Americans and Hispanic Americans spent more than average (\$635 and \$540 per trip respectively). African-Americans spent slightly less than the US average: \$438 per trip.²⁷



*Excluding Transportation Spending
Source: TIA

Technologically Savvy²⁸

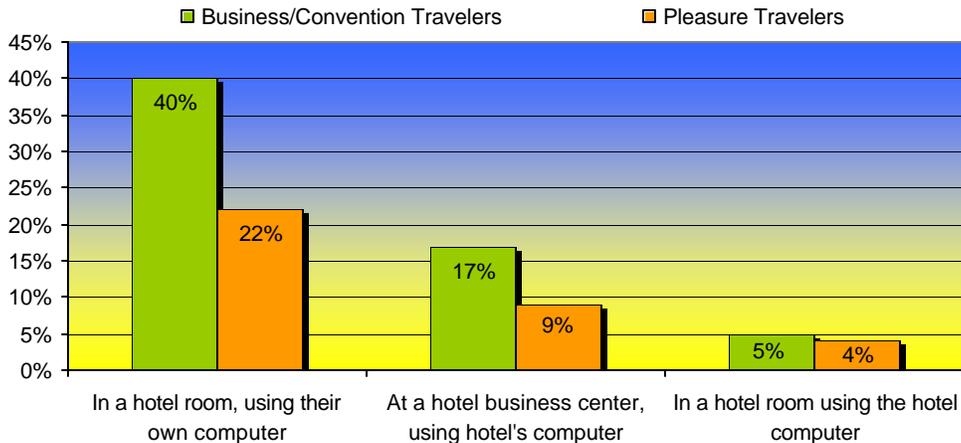
People are staying connected through technology more than ever before. Cell phone, pager, laptop computer and handheld digital device ownership (e.g. Palm Pilots®) are becoming increasingly more common. The benefit of these devices is that they are portable – something that particularly appeals to travelers. Sixty-three percent of business/convention travelers and 53 percent of pleasure travelers reported taking at least one such item with them on a trip in 1998.

Fifteen million pleasure travelers (10% of all pleasure travelers) and 8.9 million business/convention travelers (21% of all business/convention travelers) used the Internet while on a trip in 1998. Many of these travelers used Internet service provided by their hotel. Forty percent of business/convention travelers and 22 percent of pleasure travelers who used the Internet on their trip used their own computer and a connection in their room. Less than half as many used computers provided in a hotel business center, and five percent of business/convention travelers and four percent of pleasure travelers used hotel computers in their hotel room.

²⁷ Travel Industry Association of America. "Minority travelers: A large and growing market.," [Online (January 9, 2001) Available URL: www.tia.org/press/010901minority.asp].

²⁸ Travel Industry Association of America. "Americans are 'staying wired' while traveling.," [Online (November 19, 1999) Available URL: www.tia.org/press/091999poll.asp].

Places Travelers Use the Internet or Check E-Mail, 1998*



*Multiple Responses Allowed

Source: TIA

Who is most likely to use the Internet or e-mail while on the road?

- *Upper income travelers* – 18% of those with annual household incomes of \$75,000 or more
- *Young adults* – 17% of travelers 18 to 24
- *Professionals* – 16% of those with professional or managerial jobs
- *College graduates* – 14% of those with college degrees
- *Males* – 14% of males versus only 7% of females

North Carolina²⁹

In 1999, the average trip for North Carolina travelers consisted of 2.0 people. Twenty-two percent of all trips included at least one child under 18 years old. The average household income of travelers in North Carolina was \$62,000 per year.

According to a study conducted by the Travel Industry Association of America's TravelScope®, in 1999, the heads of households of North Carolina visitors were identified as:

- 47.7 years old (average)
- Married (65.5%)
- Having children under age 18 (33.3%)
- College-educated (58.9%)
- Owning a personal computer (68.6%)

Eighty-four percent of all trips in North Carolina in 1999 were by car. Most of the trips were for pleasure reasons (81%). Fifteen percent traveled for business and four percent made trips to attend a convention or seminar. Those who chose to stay overnight in a hotel, motel or bed and breakfast (32% of all visitors) spent an average of 2.4 nights. The average spending per trip, excluding transportation expenses, was \$294.

²⁹ Travel Industry Association of America. [TravelScope](#).

Average Travel Spending by Household, 1999



Source: TIA TravelScope©

Coastal Region

Travelers to the North Carolina Coastal Region are slightly older, better educated and wealthier than the average visitor to the state. The average heads of households of Coastal Region visitors were identified as:

- 48.1 years old
- Married (68.2%)
- Not having children under age 18 (32.1%)
- College-educated (61.6%)
- Owning a personal computer (67.6%)
- Having an average household income of \$64,700

Eighty-eight percent traveled to the Coastal Region by car and 90 percent came for a pleasure trip. The average party size of trips to the region was 2.3 people (higher than the state average). Only 24 percent of travelers stayed in a hotel, motel or bed and breakfast during their stay, but their stay there was slightly longer than the average North Carolina visitor: 2.6 nights. The length of stay and average party size likely attributed to the high average travel expenditure (\$396) by household of Coastal Region visitors.

Heartland Region

The Heartland Region does not have the draw of the coast or mountains that the other regions do, but it is home to the eight highest populated cities in North Carolina and some of the largest universities in the state. The average visitor to the Heartland is younger, wealthier, more inclined to own a computer, more likely to have children and more likely to be traveling for business than visitors to the other areas of North Carolina. The average heads of households of Heartland Region visitors were identified as:

- 45.1 years old
- Married (64.2%)
- Not having children under 18 (35.1%)
- College-educated (65.6%)
- Owning a personal computer (72.8%)
- Having an average household income of \$65,600

Only 78 percent of visitors drove to their destination in the Heartland Region 1999 – the lowest percentage of the three state regions. The 16 percent of visitors who traveled by airplane was more

than double the percentage in the Coastal (7%) or Mountain Regions (5%). Twenty-two percent of travelers came on business. The average trip length was 2.4 nights for the 37 percent of travelers that stayed in a hotel, motel or bed and breakfast. Travel spending was lower than average in the Heartland Region. The average household expenditures totaled \$250 per trip.

Mountain Region

Visitors to North Carolina's Mountain Region were typically older, less likely to hold a college degree, less wealthy and less likely to own a computer. The average heads of households of Mountain Region travelers were identified as:

- 49.1 years old
- Married (64.2%)
- Not having children under 18 (32.0%)
- College-educated (53.0%)
- Owning a personal computer (63.3%)
- Having an average household income of \$56,500

Automobile travel was used by the vast majority of visitors to the Mountain Region (91%). Eighty-eight percent came to the Mountain Region for a pleasure trip. Thirty-nine percent of travelers stayed at a hotel, motel or bed and breakfast during their trip, but their stay (2.1 nights) was slightly shorter than the North Carolina average. Households that visited the Mountain Region spent an average of \$285, not including travel expenses.

VI. Key Success Factors

Listed below are some suggestions for operating successful businesses in the travel and tourism industry:³⁰

- Coordinate promotional efforts with other businesses and community organizations to ensure exposure and reduce costs.
- Hire competent employees who will contribute to the quality of service that is offered in the establishment and empower them to make decisions about this service. Quality service is of vital importance to tourism products.
- Do not expect a business to provide a paycheck for the owner for a year or more. Adequate savings to cover personal living expenses during this time will decrease the possibility of failure.
- Because lending institutions are unfamiliar with this type of business, they are unwilling, in many cases, to extend loans for such endeavors. It is recommended that potential tourism business owners be prepared to use their personal funds for initial capital.
- The owner of a tourism business needs to have excellent interpersonal skills and genuinely like people.
- Because most tourism businesses are small (95%), there needs to be a high level of service that warrants high prices. This is necessary in order to produce sufficient income.
- Business skills are necessary and the business owner must be prepared for the stress of starting a new business.
- Understanding the tourism market and effectively marketing products or services to this complex market is imperative.
- The owner of a travel or tourism business must be prepared to deal with changes in weather, bad publicity, or local crime which can ruin a business season.

³⁰ NxLevel Tourism Entrepreneurial Handbook, Western Entrepreneurial Network, Second Edition, January 1997, p. 1-44.

- Pricing must be done in accordance with the marketplace. Business failure can occur from under-pricing.
- Proper assessment of the potential customer base should be done prior to developing a business plan.
- Market research that includes assessing the market, the industry, and the competition is recommended.
- Identify market niches early in the business planning process.
- Utilize customer feedback to ensure satisfaction.

VII. Ratios

To obtain financial ratios for the travel and tourism industry please see your regional center's copy of the *RMA Annual Financial Studies*. If additional information is desired, copies of the ratios can be found in the *Financial Studies of the Small Business* (18th edition) and the *Almanac of Business and Industrial Financial Ratios* (1999 edition).

VIII. List of Resources

Travel Industry Association of America
1100 New York Ave.
NW Ste. 450
Washington, DC 20005
Phone: 202/408-8422

Raleigh Conventions and Visitors Bureau
PO Box 1879
Raleigh, NC 27602-1879
Phone: 919/834-5900

Travel Agents of the Carolinas
211 E. Six Forks Road
Ste. 209-A
Raleigh, NC 27609-7754
Phone: 919/836-0880

NC Hotel and Motel Association
4101 Lake Boone, Ste. 201
Raleigh, NC 27607
Phone: 919/787-5181

NC Recreation and Park Society
883 Washington Street
Raleigh, NC 27605
919/832-5868

NC Bed & Breakfasts and Inns
PO Box 1077
Asheville, NC 28802
Phone: 800/849-5392
E-mail: ncbbi@bbonline.com

Society of Travel and Tourism Educators
19364 Woodcrest
Harper Woods, MI 48225
Phone: 313/526-0710

Travel and Tourism Research Association
10200 W. 44th Ave., Ste. 304
Wheat Ridge, CO 80033
Phone: 303/940-6557
Fax: 303/422-8894

US Travel Data Center
2 Lafayette Center
1100-450 New York Ave., NW
Washington, DC 20005
Phone: 202/408-1832
Fax: 202/408-1255

NC Travel and Tourism Div., NC Dept. of Commerce
430 North Salisbury Street,
PO Box 25249
Raleigh, NC 27611
919/733-4171

National Tour Association
546 E. Main St.
PO Box 3071
Lexington, KY 40596-3071
Phone: 606/226-4444
Fax: 606/226-4404

World Waterpark Association
PO Box 14826
Lenexa, KS 66285
Phone: 913/599-0300
Fax: 913/599-0520

American Bed & Breakfast Association
PO Box 1387
Midlothian, VA 23113-8387
Phone: 804/379-2222

Travel Professionals Association
216 S. Bungalow Park Ave.
Tampa, FL 33609
Phone: 813/876-0286

National Trust for Historic Preservation
1785 Massachusetts Avenue
NW
Washington, DC 20036
Phone: 202/673-4054

IX. Helpful Publications

- *NC Bed & Breakfasts and Inns Innkeeper Startup Kit* - Includes NC state regulations and a book on innkeeping written by Carl Glassman and Ripley Hotch. Cost: \$65. Contact the North Carolina Bed & Breakfasts and Inns Association at: 800/849-5392, info@ncbbi.org or <http://www.ncbbi.org/startup.htm>.
- How to Open (and Successfully Operate) a Country Inn: Guest Houses, Bed and Breakfast Homes, Small Hotels, Lodges, Karen L. Estell with Elaine C. Brennan. (The Berkshire Traveller Press, Inc., Stockbridge, MA 01262; 1983; 191 pages.) Contact your local bookstore for ordering.
- How to Start Your Own Bed and Breakfast: Guide to Hosting Paying Guests in Your House or Apartment, Jan Stankus. (The Globe Pequot Press, Old Chester Rd., Chester, CT 06412; 1986; 290 pages). Contact your local bookstore for ordering.
- *Heritage Tourism: Partnerships and Possibilities* - Contains an update on recent developments in heritage tourism and suggests ways to collaborate with other organizations to successfully promote heritage tourism. Cost: \$6. Contact: Donna Gentry 202/588-6286 at the National Trust for Historic Preservation.
- *Touring Historic Places* - Provides heritage site managers with helpful information for planning, marketing, and hosting effective heritage programs. Cost: \$10. Contact: Donna Gentry 202/588-6286 at the National Trust for Historic Preservation.
- NxLevel Tourism Entrepreneurial Handbook, Second Edition, January 1997 - Acts as a guide to people interested in starting a tourism business. It contains chapters on restaurants, commercial recreation, retail establishments, guide services and small lodgings. Contact: Western Entrepreneurial Network, University of Colorado at Denver, Campus Box 28, PO Box 173364, Denver, CO 80217-3364. Phone: 303/556-4815.

If you have any questions or comments about this study, please contact SBTDC's Business & Research Services at 919/715-7272.

Appendix A.

Tourism Expenditures by County, 1995- 1999

| County | Expenditures in Millions | | | | | Rate of Growth | NC Rank |
|------------|--------------------------|----------|----------|----------|----------|----------------|---------|
| | 1995 | 1996 | 1997 | 1998 | 1999 | 1995-1999 | 1999 |
| Alamance | \$77.61 | \$83.74 | \$85.35 | \$90.72 | \$98.68 | 27.15% | 22 |
| Alexander | \$10.90 | \$11.54 | \$11.91 | \$12.41 | \$13.00 | 19.27% | 86 |
| Alleghany | \$10.92 | \$11.44 | \$12.00 | \$13.07 | \$13.86 | 26.92% | 83 |
| Anson | \$8.44 | \$8.91 | \$9.76 | \$10.43 | \$10.73 | 27.13% | 88 |
| Ashe | \$19.42 | \$21.21 | \$22.30 | \$23.72 | \$26.05 | 34.14% | 63 |
| Avery | \$63.50 | \$65.92 | \$66.02 | \$70.41 | \$73.28 | 15.40% | 31 |
| Beaufort | \$38.27 | \$40.08 | \$42.01 | \$42.57 | \$44.88 | 17.27% | 50 |
| Bertie | \$6.80 | \$7.21 | \$7.42 | \$7.65 | \$7.68 | 12.94% | 92 |
| Bladen | \$19.36 | \$20.70 | \$21.36 | \$21.81 | \$23.49 | 21.33% | 66 |
| Brunswick | \$176.65 | \$188.76 | \$194.57 | \$215.01 | \$238.01 | 34.74% | 11 |
| Buncombe | \$346.91 | \$369.92 | \$379.00 | \$411.89 | \$432.50 | 24.67% | 5 |
| Burke | \$44.30 | \$46.17 | \$46.41 | \$50.16 | \$54.85 | 23.81% | 41 |
| Cabarrus | \$105.12 | \$111.48 | \$120.75 | \$129.11 | \$146.53 | 39.39% | 15 |
| Caldwell | \$32.84 | \$34.55 | \$36.13 | \$37.48 | \$38.92 | 18.51% | 52 |
| Camden | \$1.22 | \$1.30 | \$1.33 | \$1.36 | \$1.24 | 1.64% | 100 |
| Carteret | \$187.56 | \$194.66 | \$208.76 | \$208.55 | \$203.51 | 8.50% | 12 |
| Caswell | \$4.28 | \$4.52 | \$4.63 | \$4.82 | \$5.16 | 20.56% | 95 |
| Catawba | \$132.52 | \$141.50 | \$147.33 | \$160.25 | \$175.98 | 32.80% | 13 |
| Chatham | \$13.25 | \$14.26 | \$13.98 | \$14.56 | \$15.16 | 14.42% | 79 |
| Cherokee | \$18.47 | \$19.61 | \$19.90 | \$22.04 | \$24.30 | 31.56% | 64 |
| Chowan | \$11.33 | \$11.76 | \$12.05 | \$12.64 | \$13.03 | 15.00% | 85 |
| Clay | \$6.67 | \$7.08 | \$7.22 | \$7.52 | \$7.88 | 18.14% | 91 |
| Cleveland | \$56.69 | \$61.95 | \$62.26 | \$64.70 | \$65.26 | 15.12% | 35 |
| Columbus | \$31.88 | \$30.76 | \$31.96 | \$32.85 | \$34.27 | 7.50% | 55 |
| Craven | \$59.63 | \$63.05 | \$66.18 | \$67.55 | \$69.06 | 15.81% | 34 |
| Cumberland | \$217.29 | \$223.05 | \$234.91 | \$242.90 | \$241.70 | 11.23% | 10 |
| Currituck | \$38.02 | \$44.07 | \$40.81 | \$63.39 | \$70.34 | 85.01% | 32 |
| Dare | \$350.20 | \$367.47 | \$395.52 | \$440.94 | \$481.83 | 37.59% | 4 |
| Davidson | \$73.11 | \$77.20 | \$79.75 | \$82.81 | \$86.84 | 18.78% | 27 |
| Davie | \$17.55 | \$18.55 | \$19.01 | \$20.03 | \$21.60 | 23.08% | 69 |
| Duplin | \$16.95 | \$17.94 | \$18.78 | \$19.16 | \$19.49 | 14.99% | 71 |
| Durham | \$309.30 | \$333.81 | \$350.54 | \$370.44 | \$378.88 | 22.50% | 7 |
| Edgecombe | \$25.82 | \$27.23 | \$27.17 | \$29.93 | \$31.11 | 20.49% | 60 |
| Forsyth | \$358.33 | \$375.78 | \$379.20 | \$401.35 | \$423.34 | 18.14% | 6 |
| Franklin | \$10.68 | \$11.42 | \$11.43 | \$11.85 | \$13.20 | 23.60% | 84 |
| Gaston | \$102.23 | \$106.79 | \$113.55 | \$124.02 | \$132.58 | 29.69% | 18 |
| Gates | \$3.28 | \$3.50 | \$3.62 | \$3.70 | \$3.96 | 20.73% | 96 |
| Graham | \$12.99 | \$13.90 | \$13.75 | \$15.51 | \$18.42 | 41.80% | 75 |
| Granville | \$19.61 | \$20.65 | \$22.16 | \$22.82 | \$23.74 | 21.06% | 65 |
| Greene | \$3.11 | \$3.30 | \$3.39 | \$3.53 | \$3.62 | 16.40% | 97 |
| Guilford | \$663.81 | \$678.96 | \$698.55 | \$751.79 | \$814.32 | 22.67% | 3 |
| Halifax | \$41.23 | \$43.12 | \$44.02 | \$44.70 | \$47.56 | 15.35% | 48 |
| Harnett | \$34.05 | \$38.52 | \$37.46 | \$35.50 | \$38.82 | 14.01% | 53 |

| Haywood | \$74.51 | \$80.19 | \$83.04 | \$90.07 | \$95.01 | 27.51% | 24 |
|--------------|--------------------------|------------|------------|------------|------------|-----------------------------|-----------------|
| County | Expenditures in Millions | | | | | Rate of Growth 1995-1999 | NC Rank 1999 |
| | 1995 | 1996 | 1997 | 1998 | 1999 | | |
| Henderson | \$118.54 | \$123.34 | \$128.23 | \$135.11 | \$143.95 | 21.44% | 16 |
| Hertford | \$15.39 | \$16.64 | \$16.61 | \$17.09 | \$17.96 | 16.70% | 76 |
| Hoke | \$4.37 | \$4.65 | \$5.78 | \$6.12 | \$6.30 | 44.16% | 94 |
| Hyde | \$15.96 | \$16.48 | \$16.56 | \$19.53 | \$23.15 | 45.05% | 67 |
| Iredell | \$97.61 | \$16.48 | \$100.69 | \$113.54 | \$115.74 | 18.57% | 20 |
| Jackson | \$44.28 | \$47.32 | \$46.94 | \$47.31 | \$48.45 | 9.42% | 45 |
| Johnston | \$54.65 | \$57.19 | \$61.23 | \$59.58 | \$61.89 | 13.25% | 37 |
| Jones | \$2.12 | \$2.26 | \$2.36 | \$2.44 | \$2.55 | 20.28% | 99 |
| Lee | \$35.68 | \$36.88 | \$38.17 | \$40.65 | \$45.41 | 27.27% | 49 |
| Lenoir | \$44.05 | \$44.40 | \$44.84 | \$46.34 | \$50.27 | 14.12% | 43 |
| Lincoln | \$26.13 | \$27.55 | \$27.85 | \$30.50 | \$32.51 | 24.42% | 56 |
| Macon | \$74.39 | \$79.80 | \$81.55 | \$84.73 | \$87.88 | 18.13% | 26 |
| Madison | \$14.98 | \$16.08 | \$16.14 | \$18.57 | \$19.09 | 27.44% | 74 |
| Martin | \$18.19 | \$17.91 | \$16.98 | \$19.56 | \$19.18 | 5.44% | 73 |
| McDowell | \$23.12 | \$24.31 | \$26.16 | \$29.12 | \$31.99 | 38.37% | 57 |
| Mecklenburg | \$2,041.06 | \$2,224.48 | \$2,259.45 | \$2,363.96 | \$2,451.97 | 20.13% | 1 |
| Mitchell | \$14.67 | \$15.27 | \$15.61 | \$16.36 | \$17.27 | 17.72% | 77 |
| Montgomery | \$13.55 | \$14.32 | \$14.67 | \$15.16 | \$14.79 | 9.15% | 81 |
| Moore | \$191.90 | \$192.50 | \$196.00 | \$224.20 | \$257.51 | 34.19% | 9 |
| Nash | \$115.65 | \$137.25 | \$136.74 | \$139.92 | \$160.31 | 38.62% | 14 |
| New Hanover | \$220.52 | \$235.07 | \$242.26 | \$257.41 | \$294.08 | 33.36% | 8 |
| Northampton | \$8.34 | \$8.73 | \$9.00 | \$9.24 | \$9.12 | 9.35% | 90 |
| Onslow | \$86.11 | \$89.05 | \$91.05 | \$95.92 | \$96.03 | 11.52% | 23 |
| Orange | \$83.85 | \$87.85 | \$91.19 | \$95.05 | \$100.37 | 19.70% | 21 |
| Pamlico | \$10.19 | \$10.69 | \$10.91 | \$11.34 | \$11.51 | 12.95% | 87 |
| Pasquotank | \$26.02 | \$27.72 | \$29.07 | \$31.44 | \$34.36 | 32.05% | 54 |
| Pender | \$44.67 | \$46.33 | \$43.58 | \$44.44 | \$47.62 | 6.60% | 47 |
| Perquimans | \$6.24 | \$6.56 | \$6.71 | \$6.95 | \$6.91 | 10.74% | 93 |
| Person | \$17.21 | \$18.14 | \$18.86 | \$18.37 | \$19.35 | 12.43% | 72 |
| Pitt | \$104.78 | \$107.34 | \$111.62 | \$119.07 | \$127.79 | 21.96% | 19 |
| Polk | \$12.90 | \$13.60 | \$14.26 | \$14.78 | \$14.71 | 14.03% | 82 |
| Randolph | \$59.90 | \$60.78 | \$62.79 | \$66.78 | \$69.59 | 16.18% | 33 |
| Richmond | \$24.71 | \$25.85 | \$27.05 | \$29.31 | \$31.24 | 26.43% | 59 |
| Robeson | \$68.17 | \$71.13 | \$74.55 | \$76.84 | \$81.68 | 19.82% | 30 |
| Rockingham | \$38.01 | \$40.72 | \$42.19 | \$44.48 | \$47.63 | 25.31% | 46 |
| Rowan | \$66.67 | \$71.13 | \$75.90 | \$79.32 | \$91.39 | 37.08% | 25 |
| Rutherford | \$59.42 | \$69.97 | \$74.25 | \$82.96 | \$86.43 | 45.46% | 28 |
| Sampson | \$22.59 | \$23.17 | \$24.31 | \$24.67 | \$26.62 | 17.84% | 62 |
| Scotland | \$21.81 | \$23.11 | \$23.00 | \$25.02 | \$27.30 | 25.17% | 61 |
| Stanly | \$34.85 | \$36.78 | \$37.45 | \$42.01 | \$43.76 | 25.57% | 51 |
| Stokes | \$13.11 | \$13.82 | \$13.55 | \$14.15 | \$14.96 | 14.11% | 80 |
| Surry | \$43.27 | \$46.38 | \$49.72 | \$53.12 | \$56.82 | 31.31% | 39 |
| Swain | \$37.64 | \$39.49 | \$39.93 | \$42.92 | \$50.52 | 34.22% | 42 |
| Transylvania | \$45.12 | \$47.29 | \$50.10 | \$52.77 | \$55.70 | 23.45% | 40 |

| | | | | | | | |
|---------|---------|---------|---------|---------|---------|--------|----|
| Tyrrell | \$2.30 | \$2.43 | \$2.49 | \$2.56 | \$2.88 | 25.22% | 98 |
| Union | \$46.35 | \$49.00 | \$51.70 | \$55.71 | \$62.88 | 35.66% | 36 |

| County | Expenditures in Millions | | | | | Rate of Growth | NC Rank |
|---------------|--------------------------|--------------------|--------------------|--------------------|--------------------|----------------|---------|
| | 1995 | 1996 | 1997 | 1998 | 1999 | 1995-1999 | 1999 |
| Vance | \$27.77 | \$49.00 | \$32.68 | \$32.35 | \$31.29 | 12.68% | 58 |
| Wake | \$847.86 | \$922.51 | \$945.05 | \$1,020.89 | \$1,087.42 | 28.25% | 2 |
| Warren | \$14.80 | \$15.57 | \$16.00 | \$16.59 | \$16.30 | 10.14% | 78 |
| Washington | \$8.90 | \$8.69 | \$8.82 | \$9.44 | \$9.46 | 6.29% | 89 |
| Watauga | \$113.33 | \$118.55 | \$120.67 | \$130.23 | \$143.64 | 26.74% | 17 |
| Wayne | \$69.96 | \$75.07 | \$78.88 | \$78.64 | \$84.75 | 21.14% | 29 |
| Wilkes | \$42.88 | \$45.18 | \$44.55 | \$48.10 | \$49.98 | 16.56% | 44 |
| Wilson | \$44.35 | \$49.71 | \$55.38 | \$58.28 | \$58.49 | 31.88% | 38 |
| Yadkin | \$20.52 | \$22.74 | \$21.38 | \$21.42 | \$22.78 | 11.01% | 68 |
| Yancey | \$15.38 | \$16.03 | \$16.72 | \$18.00 | \$19.88 | 29.26% | 70 |
| Totals | \$13,223.40 | \$13,759.82 | \$14,111.43 | \$14,764.08 | \$15,425.08 | 16.65% | |

Source: NC Department of Commerce

Appendix B.

NC WELCOME CENTER BROCHURE POLICY

1. Any NC tourist attraction or tourism-related business is permitted to place its brochures, signs, and posters in any NC Welcome Center **only after approval** by the Welcome Center Director. The requesting agency is to send one example of the above to: Director of Visitor Services, NC Division of Tourism, Film and Sports Development, 4324 Mail Service Center, Raleigh, NC 27699-4324. Once approval has been given, a Welcome Center address list will be forwarded to the agency.

2. All material distributed through Welcome Centers will be provided free of charge to visitors.

The distributing organization must include a copy of the approval letter with the literature to be distributed. (The Welcome Centers **will not distribute** materials that are not accompanied by an approval letter). Printing and delivery charges are the responsibility of the organization providing the literature.

3. The Welcome Centers will give priority to display and distribute the following types of brochures:

- State of NC travel publications
- Accommodations-- hotels, motels, inns, bed and breakfast, ranches, campgrounds, etc. Special rate offers must have an expiration date.
- Attractions-- Tweetsie Railroad, Horn in the West, Carowinds.
- Special events and festivals-- State Fair, Hang-Gliding Championships, etc.
- Chamber of Commerce brochures, CVB brochures -- dealing with tourist-related organizations.
- Regional and area maps that include travel information
- Traveler Discount Guides
- State of NC program publications that are travel-related---Clean NC 2000, DOT Wildflower Program, North Carolina Farmers Markets

4. The Welcome Centers will not display but will distribute any literature as described below:

- Outlets, Shopping Centers, Stores
- Private Camps
- Schools, Universities
- Craft Shops (unless 95% are NC crafts)
- Restaurants
- Relocation publications
- Retirement publications

5. The Welcome Centers will not distribute any literature as described below:

- Accommodations and vacation rentals that are restricted or require a deposit or several nights stay.
- Literature which appears to be mainly commercial or non-tourist related.
- Literature containing religious or political propaganda.
- Literature promoting the sale of sponsorships, memberships, and other items/goods such as t-shirts, mugs, tapes, etc.
- Literature rating travel attractions, events and/or accommodations.
- Literature advertising non-NC attractions, events, or facilities. We may display accommodation directories. (i.e. Holiday Inn Directory, Red Roof Inn Directory, etc.)
- Literature promoting the sale of liquor, wine, tobacco, firearms, any form of gambling, beach bingo, etc. We may display winery brochures and Indian Reservation Gaming.
- Literature promoting craft shops with less than 95% of merchandise made in NC.

- Literature containing advertising that has been sold on the basis it would be displayed or distributed through the centers without permission of the Welcome Center Director. Publications should contact the Welcome Center Director prior to selling advertising and present the content, design, distribution, etc. of the publication.
- Literature devoted exclusively to the advertisement of real estate.
- Literature representing a property that has changed names since the brochure was originally printed and approved.
- Literature containing **coupons with a special rate or discount that has no expiration date.**
- Literature promoting a time-share of membership establishment which does not rent to the traveling public or offers a gift or discount in exchange for attendance at a sales presentation.
- Literature promoting a property which has not yet opened to the public. We will display brochures concerning events that are scheduled for the future.
- Mail order brochures and/or literature.

***All brochures should fit into a 9 1/2" x 4 1/4" envelope. Magazines and other publications that are too large for the racks are displayed on tabletops at the discretion of the **Welcome Center Manager.**

(revised 2/2000)