

2019 Annual Report

Visit North Carolina
A Part of the Economic Development Partnership of North Carolina

The mission of Visit North Carolina, a part of the Economic Development Partnership of North Carolina, is to unify and lead the state in positioning North Carolina as a preferred destination for travelers and film production and in maximizing economic vitality statewide.

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2019 NC Travel and Tourism Board

Listed here is the Board for the year 2019 as required for the 2019 Annual Report. For information on the current board, please go to <https://partners.visitnc.com/travel-tourism-board-1>.

Sally Ashworth

Visit Lake Norman

Appointed By: Speaker of the House

Rolf Blizzard

Turnpike Properties

Appointed By: NC Travel & Tourism Coalition

Stephanie Brown - appointed December 2018

Explore Asheville

Appointed By: Speaker of the House

Mike Butts, Chair - June 2018 to current

Visit Charlotte

Appointed By: NCTIA

Christopher Chung

Economic Development Partnership of NC

Appointed By: Economic Development Partnership of NC

Secretary Anthony Copeland

NC Department of Commerce

Appointed By: NC Department of Commerce

Kevin Corbin

North Carolina House of Representatives

Appointed By: Speaker of the House

Sen. Chuck Edwards - appointed December 2018

North Carolina Senate

Appointed By: Senate President Pro Tempore

Jonathan Fussell - appointed December 2018

Duplin Winery

Appointed By: Senate President Pro Tempore

Rep. Holly Grange - appointed December 2018

North Carolina House of Representatives

Appointed By: Speaker of the House

Joel Griffin

Griffin Stafford Hospitality, LLC

Appointed By: NCRLA - Lodging

Sen. Rick Gunn - appointed December 2018

North Carolina Senate

Appointed By: Senate President Pro Tempore

Mike Hawkins

Pisgah Enterprise

Appointed By: Economic Development Partnership

Kim Hufham - appointed June 2018

New Hanover TDA

Appointed By: DMANC

Richard Moore

Timm's Furniture

Appointed By: Governor

Joe Pierce

Charlotte Hornets

Appointed By: Governor

Sharon Sexton - appointed December 2018

Caswell County Chamber of Commerce

Appointed By: Senate President Pro Tempore

Paula Wilber

The Biltmore Company

Appointed By: NCRLA - Restaurant

Visit North Carolina a part of the Economic Development Partnership of North Carolina

October 2014 marked the transition to the nonprofit corporation known as the Economic Development Partnership of North Carolina (EDPNC). The EDPNC was created to partner with the North Carolina Department of Commerce in consolidating and enhancing North Carolina's marketing and recruitment functions, previously conducted by the N.C. Department of Commerce. The partnership serves to oversee efforts in business recruitment and development, international trade, and tourism, film and sports development. As part of this transition, the Department of Commerce's Division of Tourism, Film and Sports Development is currently referred to and doing business as "Visit North Carolina."

In the six years since the inception of the EDPNC and Visit North Carolina, visitor spending in the state has increased by \$5.4 billion. During that six-year period, marketing investment through Visit North Carolina's cooperative Partner Program has risen from \$1,639,623 in the 2014-2015 year to \$2,084,697 in the 2019-2020 program year, a 27% increase.

2019: The Year in Review

North Carolina's tourism industry achieved record performance in 2019, with estimated visitor spending at an all-time high of \$26.8 billion in direct spending, a 5.6 percent increase from 2018. Spending by travelers directly supported more than 236,000 jobs for North Carolinians, setting yet another record. Additionally, payroll income generated more than \$6.6 billion. Visitor spending generated more than \$2.1 billion in state and local tax revenues for reinvestment in communities all across North Carolina.

Source: U.S. Travel Association

Partnerships with destinations, attractions, lodging and dining properties and associations statewide remain key to North Carolina's success. Effective collaboration within the tourism industry contributed to North Carolina maintaining its position as the nation's sixth most-visited state.

Source: OmniTrak TravelTrakAmerica

Program Highlights for 2019

Employment generated by travelers in North Carolina increased 2.5 percent in 2019. These travel-related jobs comprised 5.4 percent of total non-agricultural employment in North Carolina during 2019.

Source: U.S. Travel Association

On an average day in 2019, visitors in North Carolina spent more than \$73 million and contributed more than \$5.9 million in state and local taxes.

Source: U.S. Travel Association

Visit North Carolina was an early adopter of Arrivalist, a location-based attribution tool that tracks digital advertising exposures and then corresponding arrivals to the state. Visit NC's owned digital and paid digital media generated a 52.3 percent Arrival Lift. This means those who saw Visit North Carolina's

owned and paid digital media have a 52.3 percent higher arrival rate to the state than a similar audience who didn't see our digital media but came on their own.

In 2019 marketing efforts remained focused on driving awareness of North Carolina's distinctive offerings and affinity for travel to and within the state; inspiring demand and selection of North Carolina as a destination; and amplifying the voice of industry partners in support of their own marketing efforts.

To accomplish those objectives, Visit North Carolina continued building on its "Richer Experiences" brand messaging platform reflected in the research-grounded Firsts That Last campaign introduced in spring 2018.

Articulating what is most motivating, differentiating and compelling to avid travelers, Firsts That Last features real-first time visitors – not actors – as they experience some of life's most wonderful firsts in North Carolina. Seeing the ocean, rappelling through a waterfall and tasting moonshine to name just a few, when visitors experience something for the first time in North Carolina it makes a connection and a memory lasting forever.

Visit North Carolina reached travelers in all stages of the planning and conversion funnel, delivering engaging content across a wide range of mediums including broadcast and digital tactics to drive awareness and affinity; seasonal digital campaigns driving awareness, site traffic and downstream conversion across display, native and paid social advertising; and always-on demand-capture paid search.

The program again delivered impressive results. VisitNC.com ended 2019 with 7,354,505 user sessions, a 11.1 percent increase from 2018. These sessions drove 1.56 million downstream web referrals and 43,737 phone calls to North Carolina travel industry partners.

Paid social media continued to be a powerful and efficient tool to further promote Visit NC content in-platform and on VisitNC.com. The year's efforts generated more than 1.4 million sessions, representing nearly 20 percent of total site sessions.

Proactive public relations efforts expanded Visit North Carolina's outreach to key audiences with a program that generated more than 2.9 billion consumer impressions across the United States and internationally.

Cooperative marketing programs with NC travel industry partners coupled with effective partnerships with in-state media associations resulted in an estimated \$9 million in incremental direct investment, in-kind support and value-added brand exposure for North Carolina within and outside the state.

Well received by prospective travelers and industry partners alike, Visit North Carolina's Firsts That Last campaign was also recognized by the U.S Travel Association's National Council of State Tourism Directors with the prestigious and highly coveted Mercury Award for excellence and creative accomplishment in Branding and Integrated Marketing.

The North Carolina Film Office experienced a banner year in 2019, seeing the most direct in-state spend by productions, more than \$167 million, since the state moved to its current grant program. 2019 also saw more than 11,800 job opportunities made available in the state via the film and television industry, including 2,500 well paying crew positions and 575 talent jobs. Among the many 2019 highlights were the filming of the Seasons 1 of both *Reprisal* and *Swamp Thing* as well the feature-length films *Halloween Kills*, *The Georgetown Project*, *The Eyes of Tammy Faye*, the made-for-television movie *A Christmas Love Story*, the 2020 South By Southwest film selection *The 24th* and the 2020 Sundance selection *Uncle Frank*.

Visit North Carolina's partnership with the North Carolina Sports Association continued to pay dividends with the state's success in attracting sporting events to small and large communities.

Tourism development outreach in small communities was strengthened through several initiatives, including an ongoing partnership with the NC Department of Commerce and NC Department of Natural & Cultural Resources on efforts including Cultural Heritage Tourism Development, Blue Ridge Music Trails and an expanded schedule for Visit North Carolina's Tourism Resource Assistance Center. We also continued to increase partner participation in the NC Certified Retirement Communities Program.

Please review the balance of this Annual Report for more details on Visit North Carolina's 2019 program of work and accomplishments. Visit North Carolina continues to collaborate with partners statewide to ensure North Carolina's continued success and growth as a preferred travel, film and sports destination and positive economic force for the entire state.

2019 Results

Visitor Spending

In 2019, it is estimated domestic visitors to North Carolina spent a record \$26.8 billion in the state, an increase of 5.6 percent from 2018.

Ninety-five percent of North Carolina's 100 counties experienced growth in visitor spending in 2019.

Domestic visitor spending directly supported 236,580 jobs for North Carolina residents and the tourism industry directly contributed \$6.67 billion to the state's payroll in 2019.

Traveler spending generated \$4.16 billion in federal, state and local tax receipts, an increase of 5.3 percent from 2018.

Mecklenburg County received nearly \$6.0 billion in domestic travelers' expenditures, the highest in the state. Wake County ranked second with nearly \$2.6 billion, followed by Guilford County with nearly \$1.6 billion, Buncombe County with \$1.3 billion and Dare County with nearly \$1.3 billion in visitor spending.

Warren County had the largest percentage increase at 16.6 percent followed by Caldwell (10.1 percent), Stokes (9.0 percent), Greene (8.9 percent) and Perquimans (8.8 percent) counties. Montgomery followed with an 8.4 percent increase. Moore (8.1 percent), Transylvania (8.1 percent), Watauga (7.9 percent) and Yancey (7.9 percent) counties rounding out the top 10 largest increases in 2019.

Positive spending growth was seen throughout the state's economic development regions. The North Central Region led the state with a 6.3 percent increase in spending, followed by the Piedmont Triad Region with 6.1 percent. All eight regions had spending growth of 5 percent or more.

Mecklenburg County had the largest direct employment in the tourism sector with 54,531 employees and the largest payroll at \$2.1 billion. Wake (24,772), Guilford (14,995), Dare (13,883) and Buncombe (12,516) counties each had more than 10,000 direct tourism employees.

Eighty-one percent of the state's counties saw direct tourism employment growth in 2019. The counties with the largest increases in direct tourism employment were Yancey (+5.7 percent), Montgomery (+5.6 percent), Caldwell (+5.6 percent), Guilford (+5.3 percent), Mitchell (+5.3 percent), Moore (+4.8 percent) and Transylvania (+4.7 percent) counties.

Source: U.S. Travel Association

2019 Travel Volume

North Carolina person-trip volume was 48.1 million in 2018, ranking North Carolina No. 6 in total domestic person-trip volume.

Source: Omnitrak

2019 Total State Rankings by Volume

1. California
2. Florida

3. Texas
4. New York
5. Pennsylvania
- 6. North Carolina**
7. Georgia
8. Michigan
9. Ohio
10. Tennessee

Source: Omnitrak

Average Trip Spending

North Carolina overnight visitor parties spent approximately \$760 per trip in 2019. Out-of-state visitors spent approximately \$935 per trip in 2019, while in-state resident travel parties spent \$488 per trip on average. This represents a 63 percent difference in average per trip among resident visitors traveling within the state and out-of-state visitor parties.

U.S. travel parties on average spent \$919 per trip in 2019.

Source: Omnitrak

Average Overnight Trip Duration

The average length of stay of North Carolina visitors was 3.6 nights in 2018. Resident visitors stayed an average of 3.1 nights, while out-of-state visitors stayed an average of 4.0 nights.

U.S. travelers stayed an average of 3.5 nights per trip in 2019.

Source: Omnitrak

North Carolina's Top States of Origin for Overnight Visitors

- NC 39%
- VA 12%
- SC 9%
- GA 5%
- FL 5%
- PA 4%
- NY 3%
- TN 3%
- OH 3%
- MD 2%
- NJ 2%

Source: Omnitrak

NC's Activities for Overnight Visitors

Research shows overnight visitors to North Carolina participate in a wide variety of activities, further emphasizing the diversity of the tourism product in the state.

While visiting friends and relatives and shopping are routinely mentioned every year among all travelers, exploring the state's scenic beauty, state and national parks, and rich cultural assets are among the most popular specific activities surveyed.

Source: Omnitrak

Visit North Carolina Budget Overview

Marketing Media Purchase & Production	\$6,851,199
Personnel & Administration	\$1,243,774
Rent, Facilities and Computers (tech and licensing)	\$130,066
VisitNC.com Dev. & Maintenance (Interactive)	\$855,000
International Marketing (Canada, Germany, UK)	\$1,015,885
Film Office Marketing	\$221,393
Public Relations	\$427,220
Domestic Sales Promotion (Group and Sports)	\$145,422
RetireNC and Industry Relations	\$74,289
Research	\$457,235
TOTAL	\$11,421,483

North Carolina Visitor Services Budget Overview

The Visitor Services function remains part of the North Carolina Department of Commerce and was funded by appropriations from the General Assembly. Visitor Services, comprised of the State's nine Welcome Centers, the Tourism Call Center and the Tourism Warehouse, is staffed by about 48 FTEs annually. The Call Center operates in partnership with the NC Departments of Public Safety, Transportation, and Agriculture and Consumer Services. Appropriations included:

Welcome Centers	\$2,454,655
Inquiry/Fulfillment	355,951
<hr/>	
Total	\$2,810,606

State Tourism Office Budgets: 2019-20

North Carolina's budget of approximately \$11.4 million ranked among the lowest among southern state tourism office budgets in 2019-20, significantly behind several states that are direct competitors. North Carolina's budget decreased by eight percent from the previous fiscal year.

State	Projected 2019-20 Budget	Number of FTE staff
South Carolina	30,900,000	14
Louisiana	30,500,000	25
Virginia	25,900,000	60
Alabama	22,500,000	23
Tennessee	21,300,000	27
Arkansas	18,900,000	23
Kentucky	13,800,000	14
North Carolina	11,400,000	13
Georgia	9,300,000	23

****Budgets and staffing are estimates provided by State Tourism Directors to Travel South USA and do not include Welcome Center staff.***

Advertising

Print

Print advertising garnered 10,341,777 impressions for Visit North Carolina, with placements in several high-profile regional publications. The 2019 spring print schedule was a mixture of proven titles and newcomers, including a new Local Markets – Extended package (*Modern Luxury* and *Manhattan*); expanded Local Market – Northern package (*Coastal Virginia Magazine*); and the addition of *Oxford American* (North Carolina Music issue). As part of the overall 19-20 fiscal plan, the 2019 fall print schedule was optimized based on evolving partner appetite and ever-changing media landscape – adding new publications for expanded geographic coverage (e.g., *Charleston Magazine* via Local Markets – Southern package).

Linear TV + YouTube Extension

Network and cable TV were pulsed throughout spring 2019 across three primary markets (Atlanta, DC and Nashville), in which reach and frequency were maximized within real-time, non-DVRed programming. In order to gain additional viewership, YouTube was also tapped to extend exposure in the same primary markets plus three secondary markets (Columbus, Orlando and Philadelphia). Collectively, these efforts delivered 150.5 million impressions to increase awareness and interest in visiting the state.

Digital

Digital advertising continues to play a key role in all parts of the travel planning and decision-making funnel, and Visit North Carolina's digital media plan reflects that across awareness, site traffic and downstream conversion-driving tactics. In 2019, digital advertising across platforms drove 3,955,148 sessions on VisitNC.com, and contributed to a paid media Arrival Lift of 54.2 percent. In addition to constant optimizations across vendors and tactics, 2019 saw several key advancements in digital media:

- **Paid Social:** Tapped travelers where they're receptive and seeking inspiration, primary, always-on channels remained Facebook (various ad formats, from video to static link ads, to drive brand engagement at mass scale) and Instagram (drive inspiration through visual storytelling via in-feed and real-time story units). Other levers were pulled with Twitter (newsworthy, announcement-style content spotlights) and Pinterest (drive inspiration and discovery at the point of planning) – used strategically and selectively throughout the year. End results accounted for more than 1.4 million sessions, representing nearly 20 percent of site sessions.
- **Paid Search:** YOY investment was increased to further capitalize on paid search's ability to intercept qualified user interest and intent; drive cost-efficient traffic to VisitNC.com content; and convert downstream clicks to partner sites. Google remained an always-on work horse, leveraging mixed "capture demand" and "create demand" strategies to cater to travel prospects with North Carolina already in mind while also inspiring those not searching by destination yet. Bing was introduced in fall 2019 to expand audience reach. In total, Google and Bing combined generated nearly 9 million impressions and almost 948,000 clicks – an effective 10.71% click-through rate and \$0.51 cost per click.
- **YouTube:** Beginning in July, YouTube became an always-on tactic across the full Visit NC core footprint and received increasing optimized investments in order to maximize best creative assets (Firsts That Last videos) and amplify strong performance. In-stream video ads (:15/:30 spots) were used to drive brand awareness, while non-skippable bumper ads (:06 spots) were utilized to

grab quick attention and increase reach. Efforts produced almost 38 million impressions and over 26 million video completions – an effective 70% video-completion rate.

- **Display, Native and Pre-Roll Video:** Like 2018, vendor sourcing was refined in an ongoing effort to make digital dollars work harder and smarter. The first half of 2019 leaned into historical endemic and programmatic partnerships across display (TripAdvisor, Quantcast) and native (Bidtellect). In the latter half of 2019, further vendor consolidation led to TripAdvisor continuation and an introduction to DV360 – Google’s self-service biddable platform, that allowed for centralized activation across display/native/pre-roll video while gaining more campaign control, budget fluidity and creative pulsing. Additionally, this digital camp became more focused on seasonal emphasis, allowing other channels to more efficiently maintain the always-on foundation. Combined efforts garnered over 128 million impressions and 262,500 clicks.
- **Seasonal Brand Boost:** Additional initiatives boosted 2019 summer and fall exposure, including an Expedia partnership (recovery campaign following Hurricane Dorian), as well as Travelzoo and National Geographic buys via the Travel South USA co-op program. Combined efforts yielded nearly 86 million impressions.
- **Dog Travel Agent (DTA):** Launched in fall 2019, this campaign’s goal was to drive travel to NC among dogs and their humans living in select drive markets. Supporting program levers included paid media (paid social; paid search; YouTube; display; native; pre-roll video); Jebbit experiences; organic social; and email. Fall and winter of 2019 were primarily focused on the DTA casting call and introduction of Mo – the newly hired and beloved canine counterpart to message dog-friendly travel inspiration among pet parents.

Cooperative Programs

Visit North Carolina negotiated favorable rates with leading travel, lifestyle and special interest publications to provide partners with cost-effective opportunities to broaden the reach of their own advertising efforts. In total, 27 partners invested in magazine insertions in:

- *Atlanta Magazine*
- *Blue Ridge Country*
- *Charlotte Magazine*
- *Cleveland Magazine*
- *Coastal Living*
- *Coastal Virginia Magazine*
- *Columbia Metropolitan Magazine*
- *Columbus Monthly*
- *Country Living*
- *Family Fun*
- *Garden & Gun*
- *Good Housekeeping*
- *Jacksonville Magazine*
- *Manhattan Magazine*
- *Modern Luxury Chicago*
- *Modern Luxury Dallas*
- *Modern Luxury Miami*
- *Modern Luxury Washington, D.C.*
- *Nashville Lifestyles Magazine*
- *Orlando Magazine*

- *Our State*
- *Outside Magazine*
- *Oxford American*
- *Philadelphia Magazine*
- *Pittsburgh Magazine*
- *Richmond Magazine*
- *South Carolina Living*
- *Southern Living*
- *Tampa Magazine*
- *The Roanoker*
- *The TOWN*
- *The Washington Post Magazine*
- *Walter Magazine*
- *Woman's Day*

North Carolina Ski Areas Association

Visit North Carolina and the North Carolina Ski Areas Association (NCSAA) continued working together to build awareness and intent to visit NCSAA member resorts for winter travel. The December 2018 – March 2019 cooperative marketing effort targeted NC, TN, SC, GA, FL, AL, MS and LA and drove site visits to GoSkiNC.com and downstream referrals to the resorts' own websites. Building on the momentum from the prior year's strategic shift to digital advertising (paid search, paid social and native), the campaign yielded 35 percent year over year growth in total site sessions and delivered 30,556 downstream clicks to NCSAA websites.

VisitNC.com

Overview

As the state's official travel website, VisitNC.com hosted 7,354,505 user sessions in 2019, a 11.1 percent increase from 2018. The site's strong performance built on the momentum following the spring 2018 launch of the new 'mobile first' VisitNC.com. As a result, VisitNC.com generated a total of more than 7.6 million key performance indicator actions reflecting interest in travel (detailed below).

VisitNC.com 2019 Key Performance Indicators

- 85,016 site visitors participating in **sweepstakes**
- 51,360 **Travel Guides** ordered from website
- 21,174 downloads or views of **virtual brochures**
- 5,380,931 views of **story pages**
- 392,366 keyword and filtered **searches** performed
- 2,195 clicks to view online **travel publications**
- 1,564,770 **clicks to partner websites**
- 47,326 clicks to view **travel deals**
- 54,853 on-site **video views**
- 43,737 mobile **phone calls**

Virtual Brochures

85 virtual brochures

21,174 downloads or views

Featured Event Listings

40 participating partners
173 total featured events
212,098 views of featured events
53,209 clicks to partner sites

Sweepstakes

12 sweepstakes
85,016 total entries

Most Popular Homepage Sweepstakes

1. 2019 North Carolina Travel Guide Sweepstakes (29,569 entries)
2. Ultimate Pinehurst Resort Getaway Sweepstakes (8,668 entries)
3. A Taste of Pinehurst Sweepstakes (8,352 entries)

Family of Sites**Media.VisitNC.com**

4,939 sessions in 2019
4.70 average page views per session
2:45 average session duration

SportsNC.com

13,547 sessions in 2019
1.46 average page views per session
0:41 average session duration

NCFilm.com

52,690 visits in 2019
2.26 average page views per session
1:30 average session duration

Database and Web Management

- Working in collaboration with hundreds of partners statewide, provided timely maintenance and technical support for VisitNC.com's Extranet database of more than 11,600 lodging, attraction, event and dining listings.
- Created and distributed a consistent program of e-newsletters, advisories and informational mailings.
- Incorporated more social networking efforts into the ongoing marketing program including Pinterest and Instagram.

Public Relations

In 2019, Visit North Carolina hosted 33 journalists from around the world, facilitated nine additional media visits, and worked closely with other travel writers to produce content about travel to North Carolina. Earned media activities sparked hundreds of articles, blog posts and broadcast placements about North Carolina's travel experiences, generating more than 2.9 billion consumer impressions domestically and internationally.

Media visits resulted in coverage of more than 35 counties. Twenty-one of those counties were classified as Tier 1 or Tier 2. Ten additional Tier 1 and Tier 2 counties received media coverage as a result pitches, news releases and other activities.

Other Highlights

U.S. Media Missions

The 2019 program year included strategic domestic media missions in New York and Raleigh, resulting in engagement with more than 100 editorial representatives. The events attracted such top tier national and regional outlets as CNN Travel, Travel + Leisure, Saveur, Food Network Magazine, Parents, Family Circle, The Washington Post and Food & Wine. Forty North Carolina counties, including 27 rated Tier 1 and Tier 2, were represented at one or both media missions.

North Carolina Beer Month

North Carolina's craft beer community continues to be a booming industry with more breweries to experience than ever before. Building on the success of previous North Carolina Beer Months, the partnership between the N.C. Craft Brewers Guild and Visit North Carolina grew to include NC Beer Guys in 2019. Breweries across the state again participated by creating unique craft beer events for visitors to enjoy. Partnerships, events and offerings such as these led to recognizable results, including:

NCBeerMonth.com Performance Summary:

- 8,992 pageviews between March and April
- 2,460 downstream clicks

eNews Engagement:

- Distributed five NC Beer Month e-newsletters to the NC Beer Month list once every two weeks during the 2019 campaign
 - Subscriber list grew by 2 percent from the first e-newsletter to the last e-newsletter
 - Average open rate was 26.28 percent and average click rate was 4.12 percent

In-State Marketing Initiatives

While out-of-state visitors tend to stay longer and spend more when visiting the state, North Carolinians are also a point of focus within Visit North Carolina's program. Residents typically comprise approximately one-third of annual visitation, and partnerships with the North Carolina Association of Broadcasters, the North Carolina Press Foundation and UNC-TV remain key to Visit North Carolina's ability to cost-effectively reach more than ten million prospective travelers in the state's own backyard.

North Carolina Association of Broadcasters

Member television and radio stations aired 40,923 spots representing a value of \$2,886,317.

North Carolina Press Foundation

Seventy-one newspapers with a combined circulation of more than 1.26 million published an estimated 2,300 ads representing a value of \$1,080,000.

UNC-TV

UNC-TV's award-winning team produces 52 weekly episodes of its popular show *North Carolina Weekend*. Each episode is broadcast statewide multiple times each week on three of UNC-TV's program services: UNC-TV, The Explorer Channel and the North Carolina Channel. In 2019, *North Carolina Weekend Shorts*, a new program website and YouTube channel were introduced to further showcase the show's content. *North Carolina Weekend* provided more than \$1.6 million in valuable exposure while featuring more than 200 destinations, attractions and events across the state.

Visitor Services

North Carolina's nine Welcome Centers hosted **8,307,495** visitors in 2018. A breakout of the number of visitors by Welcome Center location is below:

2018 Welcome Center Estimated Visitors	
I-95 S	1,077,268
I-95 N	1,537,898
I-85 S	1,322,090
I-85 N	540,718
I-77 S	323,847
I-77 N	1,012,830
I-40 W	919,073
I-26 W	295,610
I-26 E	1,278,161
Total:	8,307,495

The I-95 North Welcome Center was the most visited in 2018, hosting 1,537,898 travelers. Welcome Centers registered about 7,000 visitors from other countries, including 5,000 from Canada and representing six of seven continents.

In 2018, Welcome Centers booked approximately 17,360 room nights, representing total revenue of nearly \$2.253 million at an average rate of \$129.83 per room night.

Publications

The result of work throughout 2019, Visit North Carolina worked with Meredith Travel Marketing to produce the Official 2020 North Carolina Travel Guide by mid-December 2019. The Official Travel Guide serves as Visit North Carolina's primary fulfillment piece for potential visitors to and within the state. The Official North Carolina Travel Guide uses three different covers to reflect the diverse natural beauty found in the state's mountain, Piedmont and coastal regions. With 2020 marking 100 years of women suffrage, all three covers honor the occasion by featuring women.

The mountain cover highlights fly fishing near Cullowhee. For the Piedmont, the cover features James Beard Outstanding Chef Ashley Christensen in Raleigh. The coastal cover captures camping along the Tar-Pamlico River Paddle Trail near Washington. Each cover of the 2020 Travel Guide also represented a sweepstakes offering a weekend getaway as the prize. Included inside the 172-page guide are listings for 860 attractions, 2,675 accommodations and campgrounds, plus curated content with vibrant photos and text blocks that provide travel inspiration and information for every county. Travel planners can find further assistance from the two-page map with major roads, bodies of water, parks, cities and towns.

The 2020 Travel Guide, the official guide for North Carolina's state tourism office, was produced by Meredith Travel Marketing. It was financed by private industry support with \$703,000 in advertising which helped produce 500,000 printed copies and digital edition. Listings for the attractions, accommodations and campgrounds were provided for free. The self-mailer format for printed copies reinforces the green initiatives of Visit North Carolina, which is part of the Economic Development Partnership of North Carolina.

NewsLink

Emailed weekly to nearly 4,800 subscribers, *NewsLink* is an electronic publication designed to provide information to the tourism industry. The mailing list also includes legislators, economic developers and media. In 2019, *NewsLink* covered 634 stories within the 49 weekly and three "Special Edition" issues, providing timely information on tourism-related research, statewide and international trends, media leads, updates on conferences and events, and other items of interest to those in the tourism field.

There is no subscription charge for this newsletter and it is available to anyone with a valid email address. It is only sent to those requesting to receive the newsletter.

Domestic Marketing

American Bus Association (ABA) Marketplace, January 2019, Louisville, KY

ABA Marketplace is one of the premier industry events for the group travel industry, allowing Buyers and Sellers to meet face-to-face in prescheduled appointments. In addition to the quality appointments, Marketplace offers professional education seminars and numerous networking opportunities. At the 2019 Marketplace, Visit North Carolina:

- Hosted a networking reception for tour operators and partners
- Conducted 36 appointments with tour operators during the week, promoting group travel throughout the state.

Travel South Showcase, February/March 2019, Myrtle Beach, SC

This showcase is a regional appointment-style marketplace focused on increasing travel to and within the Southern states. The showcase offers the most targeted opportunity for tour operators / wholesalers and travel service providers to meet face-to-face with Southern travel suppliers. Visit North Carolina utilized showcase opportunities to:

- Team with 31 travel industry partners and conduct strategic, business development meetings.
- Met with 27 domestic tour operators, focusing on what's new with the state's tourism products and on North Carolina's position as a travel destination market leader.
- Organized and led 2 familiarization tours after the conference.
- In total 25 tour operators participated in the familiarization tours visiting 13 counties, 18 attractions, 13 restaurants and 6 hotels.

2019 Annual Blue Ridge Parkway Familiarization Tour

In April, Visit North Carolina partnered with Virginia and Tennessee in hosting a seven-day tour of the Blue Ridge Parkway with 19 AAA representatives from across the United States and 3 CAA representatives. Several days were spent with group in all areas of North Carolina's mountain region.

NCMA, VMA, MCASC Regional Meeting, September 2019, Winston-Salem, NC

Sponsored the North Carolina Motorcoach Association, Virginia Motorcoach Association & South Carolina Motorcoach Association regional meeting in Winston-Salem.

- Met with 20 domestic tour operators, promoting state's tourism products for groups.
- 23 partners attended

International Marketing

Canada

Market Highlights:

- Multiple daily non-stop flights to Charlotte Douglas and Raleigh-Durham airports.
- No. 1 international market with 404,663 overnight visitors due to ease of access via highways and direct air service. The majority of overnight visitors came from the province of Ontario followed by those from Quebec.
- These visitors spent \$224 million.

Cooperative Marketing & Advertising Opportunities

Visit NC teamed with Brand USA, the nation's official tourism office, in a spring multichannel initiative. The campaign included a one-page ad circulated through several major publications in Canada (digital and print), social amplification via Brand USA's social channels, co-branding through Expedia's Discover America landing page and guaranteed clicks through Google display network.

Results:

- Total impressions: 2.6 million. Bookings on Expedia in Canada during the campaign.
- 2135 room nights, \$299,369 in revenue
- 1087 flights, \$466,135 in revenue

Baystreet Bull

Visit NC advertised in the high-end Toronto Lifestyle publication and also was a presenter at their Women Who Lead event with more than 200 attendees. Attendees received information that focused on North Carolina's culinary scene.

Travel Zoo Campaign

Visit NC had sponsored content that included stories and social posts that resulted in 3.7 million impressions, 757,945 social impressions and average time on the story was four minutes and five seconds.

Sales Missions and Trade Shows

Visit NC and 5 local tourism office partners met with more than 40 media members in Toronto & Montreal.

The state's Trade Mission included two partners from key airport markets. In the mission, the group trained more than 250 travel professionals in Toronto and Montreal.

Zoomer Trade Show

As a key market for NC visitation, we exhibited at the Zoomer show, considered Canada's premiere show for the 45 and older consumer. The focus was on reaching the snowbird market in advance of the winter travel season. We had 25,000 attendees with 75 opportunities to engage with our photo booth, obtaining 150 contest entries.

Toronto Outdoor Adventure Show

Visit NC exhibited at the Outdoor Adventure Show in February, reaching more than 26,000 outdoor enthusiasts. We created a social media contest around "my dream adventure," which generated more than 200 entries and a prize drawing from Crystal Coast CVB.

Toronto National Women's Show

Visit NC participated in the 2019 show which was a great opportunity to engage a targeted audience of female consumers. Attendees were invited to engage with an interactive green screen booth experience complete with iconic North Carolina backgrounds and social media content. We obtained 75 North Carolina opt ins and several trip leads.

Canadian Public Relations Results

- Attended Discover America Day (12 scheduled media appointments) and the Travel Media Association of Canada Conference (17 scheduled media appointments).
- 9 journalists hosted
- Placement generated a total reach of 56 million impressions

Overseas Visitors

In 2019, North Carolina attracted 920,535 international visitors who spent an estimated \$1.2 billion in the state. Canada, the U.K. and Germany were the top countries of origin to the state in terms of visitor volume. Other top countries of origin were China, Mexico, India, Japan, France, Brazil and Australia. While overseas visitation to the U.S. was down, North Carolina had an increase of 3.6 percent.

North Carolina's Top 15 International Markets by Market Share (Ranked by Visitors)

Rank	Country of Origin	2019 Estimated Visitors	Percent Change from 2018	2019 Estimated Spending	Percent Change from 2018	Average Spending per Visitor
1	Canada	405,663	1.2%	\$224.2m	-3.5%	\$553
2	United Kingdom	84,425	8.9%	\$141.6m	5.5%	\$1,677
3	Germany	51,044	-0.4%	\$72.4m	-4.6%	\$1,418
4	China	32,993	1.9%	\$88.3m	-1.8%	\$2,676
5	Mexico	29,691	8.2%	\$13.5m	3.6%	\$455
6	India	27,772	9.4%	\$63.5m	6.4%	\$2,287
7	Japan	21,449	13.9%	\$42.3m	9.0%	\$1,970
8	France	18,071	2.3%	\$21.9m	-2.1%	\$1,214
9	Brazil	16,738	6.1%	\$37.9m	1.8%	\$2,266
10	Australia	14,117	-0.3%	\$25.6m	-7.2%	\$1,814
11	South Korea	11,456	16.5%	\$24.9m	9.7%	\$2,176
12	Spain	11,216	5.6%	\$11.5m	1.0%	\$1,022
13	Italy	10,424	1.9%	\$13.1m	-4.8%	\$1,260
14	Ireland	7,639	3.3%	\$9.3m	-3.8%	\$1,217
15	Sweden	7,528	-10.0%	\$8.8m	-10.2%	\$1,167
16	Switzerland	5,892	-3.8%	\$11.7m	-6.0%	\$1,983
17	Denmark	5,755	-3.1%	\$13.2m	-9.4%	\$2,286
18	Russia	5,434	8.2%	\$11.3m	2.4%	\$2,078
19	Norway	5,107	-13.8%	\$9.4m	-18.9%	\$1,842
20	Argentina	4,361	-7.6%	\$6.3m	-13.1%	\$1,444
	Total	920,535	3.6%	\$1.2b	1.3%	\$1,290

**Tourism Economics, 2020*

U.K. and Ireland

Market Highlights:

The U.K./Ireland is the top overseas market to North Carolina. The state is served directly as follows:

- Two daily non-stop flights to Heathrow.
- Seasonal service to Dublin, Ireland.
- No. 1 overseas market with 84,425 visitors.
- These visitors spent \$150.9 million.

Sales & Marketing Accomplishments

In partnership with tour operator, Kuoni, and neighboring states, Georgia and South Carolina, Visit NC was a contributing sponsor for Kuoni's Consumer Facing Campaign at their four festivals throughout the U.K. Total footfall for all shows was 455,000. These potential visitors received a tri-state dedicated American Roadtrip Brochure and saw videos displayed throughout the events.

Sales & Marketing Co-ops

Co-op Marketing was carried out with a number of tour operators across all distribution channels and included activities with:

- America As You Like It
- Bon Voyage
- Platinum Travel
- Travel 2
- Kuoni

Trade Shows

- Visit North Carolina (U.K. & Ireland) were present at IPW 2019 in Anaheim, CA.
- Visit North Carolina joined other Travel South USA states exhibiting at WTM London.
- North Carolina was present at the Visit USA UNITE Tour Operator day where 21 one-to-one meetings with product managers occurred.
- The U.K. & Ireland office attended the 365 Conference, a great opportunity for them to meet and network with the team from various areas of the state, pickup new information and make new contacts.

Consumer Shows

- Visit North Carolina participated in the Visit USA Pavilion at the Destinations Consumer shows in Manchester and London, these being held in the key planning months of January and February.
- Visit North Carolina participated at the Holiday World Consumer Show in Dublin, Ireland, held in January 2019.

Sales Missions

Following the Brand USA Week Visit NC hosted 18 key travel partners at the Goodwood Revival Festival.

In October, Visit NC and Visit Charlotte teamed with Brand USA to be a sponsor at the Carolina Panther game in London. We hosted 16 trade/media partners for the event.

Visit USA Associations in the U.K. and in Ireland

- Four quarterly meetings attended for the U.K.
- Four quarterly meetings attend in Ireland.
- Hosted table at the Independence Day Visit USA Ball, the key event in the U.K. calendar for the senior members of the travel industry.

- Training spot on the Visit USA Training Roadshow where 250 agents were trained across three cities (Edinburgh, Liverpool & Reading).
- Visit North Carolina attended two key Ireland events for media and tour operators – Irish Travel Industry Awards and TravelMedia USA Summer Evening Event.

Brand USA Multi-Channel Results

Visit NC partnered with Brand USA to leverage awareness in the U.K. market with their Multi-Channel Campaign. Through print and digital channels North Carolina was featured for six weeks. Results during that time were three million impressions, 1,503 room nights booked, and 202 flights generating \$181,000.

U.K. Public Relations Results:

- Individual media familiarization tours took place focusing on the various areas and activities of the state and included a mix of activities and interests.
 - Assisted in 34 features reaching 196.4 million
 - Published 95 articles reaching 701.5 million
- Coverage was across all media channels including trade and consumer publications, online outlets and radio.
- U.K. & Ireland coverage was statewide from the mountains to the coast.
- Visit North Carolina was represented at key media events during the year, including Visit USA Meet the Media, TravMedia & British Guild of Travel Writers events.

Germany

Market Highlights:

- No. 2 overseas market with 51,044 visitors to North Carolina
- Visitors spent \$72.4 million
- Supporting three daily non-stop flights from Munich and Frankfurt to the state

Sales and Marketing Accomplishments

America Unlimited

Worked with tour operator, America Unlimited, to produce a high-resolution video and promote through social media to their 160,000 subscribers. Results saw a 30% increase in bookings during the promotion period. It generated 101,819 views on You Tube and 145,604 views on Facebook.

Roadshows

Visit NC participated in Visit USA roadshows in Germany, Switzerland and Austria training more than 250 travel agents in total on North Carolina's travel assets.

Mustang Campaign

Visit NC teamed with denim jean maker, Mustang, to introduce North Carolina to Mustang jean customers at 50 top point of sale retailers in key cities. A microsite, video and social campaign were created that promoted North Carolina as well as their products. The campaign lasted for six weeks. Our tour operator partner, CANUSA and Alamo donated the prize trip.

American Airline Breakfast Trainings

We conducted three breakfast trainings to launch the new Munich-Charlotte flight on American Airlines in Spring 2019. In total, we trained 42 agents.

Sales & Marketing Accomplishments

Co-op Marketing was carried out with a number of operators across all distribution channels and included activities with:

- America Unlimited
- Amerikareisen
- Argus Reisen
- CanUSA
- CRD
- Cruising Reisen
- FTI
- Knecht Reisen
- USA Reisen

Familiarization Tour

Fam for 11 TUI agents from around Germany was held in Charlotte and Asheville.

Consumer & Travel Trade Shows – featuring the new German Travel Guide

- NC brochure distribution at f.r.e.e Munich, CMT Stuttgart and Reisen Hamburg
- Messe Bremen

German Public Relations Results

- Organized four individual media FAMs
- 350 placements
- 150 Facebook posts reaching 50,000

Other International News

Travel South USA

Visit NC led a large group of statewide partners to the Travel South International Showcase in St. Louis, MO. Nearly 100 international tour operators from 12 countries met with North Carolina CVBs, attractions and hotels to increase interest in international visitation to North Carolina.

Through a partnership with Travel South USA, Visit North Carolina has also been able to cost-effectively secure limited PR and marketing representation in France, Italy, Benelux and China and the Nordic countries.

With this partnership, NC hosted a media and tour operator fam to Raleigh and the Outer Banks. Along with several other Southern States attended a sales mission to China.

FRANCE

Visit North Carolina exhibited in the Travel South booth at IFTM in Paris. Preceding this show a media event was held featuring James Beard Award Winning Chef, Ashley Christensen at the home of author John Grisham. We hosted 20 journalists and airline representatives at the event.

IPW

Visit North Carolina hosted a double North Carolina booth at the U.S. Travel Association's IPW in Anaheim, CA. Visit Charlotte and Visit Raleigh joined the state in more than 85 trade and media appointments.

WeChat in China

Visit North Carolina has a weekly post on WeChat in China with more than 32,000 followers.

President's Cup in Melbourne, Australia

In 2021 the President's Cup Golf Tournament will be held in Charlotte, NC. To generate excitement for the tournament, Visit NC had a tent at the 2019 tournament in Melbourne. The tent featured a photo booth with the Championship Cup. We collected 1,200 entries for the prize trip. The winner received a trip to Pinehurst, Charlotte and the Outer Banks.

Brand USA Co-op Marketing Programs

By leveraging our marketing dollars with Brand USA, we have been able to have an impact in several international markets despite our limited funding. We get the power of three times our promotional dollars to increase awareness to potential visitors.

In 2019 we participated in the following programs:

- Inspiration Guide – 575,000 printed USA guides translated into 10 languages for distribution in more than 20 countries.
- Multichannel Campaigns in U.K. and Canada – aimed at both print and digital mediums with online booking included.
- Visit NC participated in the inaugural Travel Week show in London. We met with 36 European based tour operators at one-on-one appointments.

Tourism Development

The Tourism Development Manager continued to work with rural communities to foster visitation to the lesser-known areas of the state. In addition, working with these communities to foster its culture and heritage through various genres of traditional and heritage music and heritage trails and programs across the state. Small towns are an important part of the North Carolina landscape.

Visit North Carolina is actively involved in ongoing programming either independently or in conjunction with partners such as the NC Rural Center, the Department of Commerce's Division of Community Assistance, the Department of Natural & Cultural Resources, NC Arts Council, NC Folklife Institute and other entities to foster revitalization that will make the communities more attractive to residents and visitors. To do so, Visit NC's Tourism Development team:

- Set goals for the Tourism Development Program and improved the delivery of information for the program on the Visit NC website. The effort is designed to make local communities more aware of resources within Visit NC as well as other opportunities for tourism development.
- Gathered information for Visit NC's film office, public relations, domestic marketing and international marketing programs.
- Continued to research available resources in the form of grants, technical assistance and development (state, federal, private philanthropic).
- Made presentations to partners throughout North Carolina on Cultural Heritage Tourism Development and ways to work with Visit NC through its TRAC Program.
- Represented Visit NC in partnership the African American Heritage Commission.
- Continued to assist with the promotion of the Blue Ridge Music Trails of NC, Freedom Roads, US Civil Rights Trail, NC Civil War Trails, NC Civil Rights Trail and other products in the regions.
- Continued promotion and expand the NC Certified Retirement Community Program.

Tourism Resource Assistance Center (TRAC)

The Tourism Resource Assistance Center (TRAC) was developed along with the Industry Relations Manager to bring Visit NC's program managers to local communities to share and discuss the nuts and bolts of partnering effectively with Visit NC.

TRAC sessions through 2019

1. New Bern
2. Lexington
3. Smithfield
4. Bryson City
5. Morganton
6. Jacksonville
7. Edenton
8. Greensboro
9. Outer Banks "Mini TRAC"
10. Fayetteville
11. Wilmington
12. Danbury
13. Pinehurst
14. Yadkinville
15. Warrenton
16. Greenville
17. Blowing Rock
18. Banner Elk/Beech Mountain
19. Dunn
20. Troy
21. Marion
22. Creedmoor
23. Mount Airy
24. Washington
25. Mars Hill
26. Maggie Valley
27. Reidsville
28. Sanford

- 29. Roxboro
- 30. Tarboro

2019

- 31. Edenton/Chowan Co.
- 32. Burlington/Alamance Co.
- 33. Goldsboro/Wayne Co.
- 34. Belmont/Gaston Co.

Consumer Show Attendance

Visit NC led groups of in-state partners at three Consumers Shows in 2019:

1. Travel & Adventure Show DC – Partners (Outer Banks Visitors Bureau, Greenville-Pitt County CVB, High Point CVB, Johnston County Visitors Bureau, Cabarrus CVB, Yadkin Visitors Center, Asheboro CVB, Lexington TDA, Boone and Watauga County TDA)
2. NY Times Travel Show – Partners (Outer Banks Visitors Bureau, Greenville-Pitt County CVB, New Bern-Craven County CVC, Rockingham County Economic Development and Tourism, Pender County Tourism, Ocracoke Business Association, Johnston County Visitors Bureau, Island Express Ferry)
3. Travel & Adventure Show Philadelphia – Partners (Outer Banks Visitors Bureau, New Bern-Craven County CVC, High Point CVB, Boone and Watauga County TDA, Yadkin County TDA, Greenville-Pitt County CVB, Johnston County Visitors Bureau, Crystal Coast TDA)

Community Partnerships and Heritage Development

Visit NC also continued to be actively engaged in the development of outdoor recreational/ecotourism/agritourism/heritage opportunities in the regions across the state. Farms, waterways, hiking and biking trails, greenways and open spaces are important features in a community that improve and promote quality of life and link people with their natural and cultural heritage. These partnerships include assistance in researching resources for communities, working with communities interested in Tourism Development Authority development, marketing initiatives, heritage trails development and product development plans. Created by congressional legislation, the Blue Ridge National Heritage Area (BRNHA) is supported through a partnership with Visit NC to assist in coordinating planning for the 25 counties in the designated region. Visit NC continued to assist in the implementation of the initiatives outlined in each county's heritage plan, and had an active role in assisting the BRNHA in developing, facilitating and guiding communities along the Blue Ridge Parkway for themes such as agriculture, arts and culture, traditional music, history/heritage and natural resources. In addition, Visit NC continued work on the Blue Ridge Music Trails of North Carolina with the BRNHA and the NC Arts Council to roll out a new book and map guide, as well as collaborated closely with the communities participating in the NC STEP Program through the NC Rural Center and the NC Main Street Program.

North Carolina Civil War Trails

The Civil War Trails Program is marketed in five states – Virginia, Maryland, West Virginia, Tennessee and North Carolina, with more than 1,000 interpretive markers. Visit NC continued to partner with the North Carolina Department of Transportation and North Carolina Department of Natural & Cultural Resources to promote the NC Civil War Trails program. Marketing Universals were developed by Civil

War Trails Inc. and all five state partners to display the program as the “best” way to experience Civil War history, using social media, print and online advertising.

- An updated Civil War Trails map has been printed and is available online and in all NC Welcome Centers.
- Visitors can download Civil War Trails maps from www.VisitNC.com, receive mapguides via mail through the Call Center as well as in the (9) Welcome Centers.
- N.C. has 279 sites in 78 counties.

Cultural Heritage Trails Development

- Assisted in the promotion of the Blue Ridge Music Trails, partnering with the Department of Natural & Cultural Resources, NC Arts Council, BRNHA and other communities in the region.
- Assisted in the promotion of the Blue Ridge Craft Trails.
- Worked with Department of Natural & Cultural Resources in the development of the African American Music Trail in the counties of Onslow, Lenoir, Craven, Pitt, Edgecombe, Wilson, Wayne and Greene.
- Worked with the African American Heritage Commission in the development of “Freedom Roads” Underground Railroad Heritage Trail, NC Civil Rights Trail and also collaborated with the Gullah Geechee National Heritage Corridor.
- Continued to work with the NC Folklife Institute to promote the traditional arts of North Carolina.
- Work with Travel South USA US Civil Rights Trail

Certified Retirement Community Program

The North Carolina Department of Commerce operates a community development program for communities that are positioning for retiree attraction as an economic and community development strategy. The N.C. General Assembly, during the 2008 short session, recognized the inherent panoply of quality living the state offers and established the N.C. Certified Retirement Community Program (S.L. 2008-188) as a vehicle to designate communities offering this unprecedented quality of living sought after by the mature community.

To gain certification, a local government must submit an application for consideration. Initial evaluation of the community and technical assistance is provided by the Department of Commerce’s Community Development Division. The designation has a five-year life, after which communities will need to consider recertification at the sunset of the five-year period. Once a community has completed the certification process, Visit NC will help market and promote the community.

- Visit NC worked with the NC Department of Commerce Community Assistance office to administer and review applications.
- Visit NC’s Tourism Development Manager continued to make presentations to local County Commissions and City Managers on the guidelines, requirements and benefits of the program to increase participation.

Visit NC continued to attend conferences on trends, research and developing retirement communities, and serves on the Board of Directors for the American Association of Retirement Communities (AARC).

Visit NC continued to promote certified communities and areas of North Carolina during the Ideal Living Regional Expos in Long Island, NY; Chicago, IL; Bridgewater, NJ; Greenwich, CT and Washington, D.C. Metro Area

Results:

- 5,500 leads generated
- 985 packets downloads from retirenc.com
- 104 packets mailed through the Call Center
- 1,776 moves to North Carolina
- 372 moves through August 2019 (200 are out of state moves; 172 NC-NC moves)

Visit North Carolina's certified communities include:

1. Lumberton (pilot program)
2. Asheboro
3. Marion
4. Sanford
5. Pittsboro
6. Mt. Airy
7. Eden
8. Edenton
9. Tarboro
10. Winterville
11. New Bern
12. Lenoir
13. Laurinburg
14. Reidsville
15. Jamestown/High Point
16. Washington
17. Roanoke Rapids
18. Elizabeth City

2019 CRC additions

19. Johnston Co.
20. Salisbury

AmericanaFest

Visit NC along with NC DNCR were key sponsors at AmericanaFest in Nashville to celebrate NC's Year of Music. Education and artist showcases featuring North Carolina music and artists.

Industry Relations

Visit NC 365 in Wilmington (March 31 – April 2, 2019)

Visit NC's annual conference for the state's travel and hospitality industry was held at the Wilmington Convention Center in Wilmington and featured dynamic educational programming and valuable networking opportunities. The 2019 Winner's Circle Awards were also presented and recognized distinguished North Carolinians for their contributions to the growth and success of the state's tourism industry. Honorees for 2019 included Mary Baggett Martin, The Fussell Family, and the Esse Quam Videri Award to Stephen Hill and Vivian Howard.

Tourism Week in Raleigh (May 5-11, 2019)

Gov. Cooper proclaimed during North Carolina Tourism Week the travel industry had a record impact on the state's economy in 2018, with \$25.3 billion in direct visitor spending generating more than 230,000 tourism employment jobs. In addition, state tax receipts as a result of visitor spending rose to more than \$1.28 billion.

Visit NC joined the N.C. Travel & Tourism Coalition, the N.C. Travel Industry Association, and other industry partners in Raleigh to emphasize the economic benefits of tourism throughout the week-long meeting with legislative representatives and hosting a legislative reception at the NC Museum of Natural Sciences. North Carolina's nine Welcome Centers hosted their own events during the week to thank travelers to the state.

U.S. Travel Association's Destination Capitol Hill (April 10-11, 2019)

In April, Visit NC along with Visit Charlotte visited NC legislators on Capitol Hill as part of U.S. Travel Association's Destination Capitol Hill. Discussions around infrastructure, natural park lands and continuing Brand USA funding lead the conversations.

Sports

Connect Marketplace, August 2019, Louisville, KY

Visit NC partnered with NCSA to sponsor the Connect Sports Marketplace. This annual trade show brings together rights holders and sports planners from across the U.S. North Carolina showcased our facilities and sports organizations through pre-scheduled appointments and networking functions. Nineteen in-state tourism partners attended the marketplace to learn more about sports marketing trends and meet with sports rights holders.

TEAMS Conference, November 2019, Anaheim, CA

Visit NC sponsored the annual TEAMS (Travel, Events And Management in Sports) Conference & Expo in Anaheim, CA, Nov. 11-14. The SportsNC aisle consisted of 22 partners sharing 9 booths and representing 17 different organizations across the state. Each booth participated in pre-scheduled appointments during the conference. TEAMS is one of the premier trade shows for sports planners to meet with destinations and sports organizations to conduct business as well as learn about industry trends and best practices related to sports.

Mountains to Coast Ride

Visit NC partners with North Carolina Amateur Sports, Capitol Broadcasting Company and the N.C. Department of Transportation each year to host one of the largest and most successful cross-state bicycle tour events in the United States, Cycle N.C.'s Mountains to Coast Ride. Cycle North Carolina is a week-long bicycle tour across North Carolina that was created to promote North Carolina's scenic beauty, heritage tourism, visitor attractions, historic sites, state parks and healthy lifestyles.

During the past 21 years Cycle NC has stopped overnight in more than 100 North Carolina towns and visited more than 700 North Carolina communities. Each overnight stop by Cycle NC generates some of the largest sales days of the year for restaurants, hotels, visitor attractions and other businesses. Cycle NC events generate millions of dollars in economic impact each year for numerous small North Carolina towns as the event travels the secondary roads exploring our great state.

- September 29 – October 5, overnight stops in Blowing Rock, Hickory, Spencer, Siler City, Clayton, Greenville, New Bern, Atlantic Beach
- Participation: 964 cyclists
- U.S. States Represented: 39 (plus D.C. and Canada)
- Average Age: 59
- Oldest Rider: 82
- Youngest Rider: 6
- Male/Female Ratio: 71 percent / 29 percent

2019 Cycle NC Excursions

For the fourth year the two partnered together to offer day Cycle NC/Visit NC Excursions for the Mountains to the Coast Ride. These excursions give participants and their families the opportunity to take a break from the ride and experience the state, while expanding the economic impact of the Mountains to Coast ride. Daily excursions visited 15 different counties, and each day brought positive feedback from the participants on their experiences.

North Carolina Film Office (FilmNC)

The North Carolina Film Office (FilmNC) and regional film commissions promoted filmmaking in North Carolina at the Association of Film Commissioners International's (AFCI) 2nd annual AFCI Week and made several sales calls to the West Coast. In 2019, FilmNC was once again promoting the state at the annual Sundance Film Festival in Park City, Utah and returned to Austin, Texas for South By Southwest.

Locally, FilmNC continued its sponsorship with the Cucalorus Foundation's the "Filmed In NC" filmmakers fund, given out to North Carolina filmmakers to help highlight their works on a national and international stage, while continuing to use various online resources to promote more than 30 film festivals held across the state.

FilmNC continued its highly successful doughnut campaign, in which branded boxes of Krispy Kreme doughnuts were sent to numerous production companies based in Los Angeles and New York City as a way to remind these companies about the state's 25% rebate program as well as established infrastructure and strong crew base.

2019 also saw FilmNC do a comprehensive survey that examined how North Carolina is viewed by production companies and where improvements might be able to be made to better attract additional projects. FilmNC scored well on relationship building and services and contact provided by the state office. Areas of improvement for the state included adding more crew as well as handicaps of the current rebate program such as high minimum spend amounts and relatively low project caps.

2019 Total Production Estimates & Highlights* from N.C. Film Office:

- 57 projects
- \$167,497,481 direct spend by productions
- 1,629 production days
- 11,820 jobs opportunities created
 - 2,464 crew, 575 talent, 8,781 extras

**per information provided to FilmNC and/or one of the regional film commissions in the state*

Highlights/National Productions of Note that filmed in North Carolina during 2019 include:

- *A Christmas Love Story* – Charlotte Region (grant recipient)
- *Wicked Tuna: Outer Banks (Season 6)* – North Eastern Region
- *The Good Things Devils Do* – Western Region
- *My Big Fat Fabulous Life (Season 7)* – Piedmont Triad Region
- *Love It or List It (Season 15)* – Research Triangle Region
- *Swamp Thing (Season 1)* – Wilmington Region (grant recipient)
- *Uncle Frank* – Wilmington Region (grant recipient)
- *The 24th* – Charlotte Region (grant recipient)
- *Reprisal (Season 1)* – Wilmington Region (grant recipient)
- *Halloween Kills* – Wilmington Region (grant recipient)
- *The Georgetown Project* – Wilmington Region (grant recipient)
- *The Eyes of Tammy Faye* – Charlotte Region (grant recipient)

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