



2014 Annual Report

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

The mission of Visit North Carolina is to unify and lead the state in developing North Carolina as a major destination for leisure travel, group tours, meetings and conventions, sports events and film production.

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2014 NC Travel and Tourism Board

Listed here is the Board for the year 2014 as required for the 2014 Annual Report. For information on the current board, please go to <http://partners.visitnc.com/directories/travel-tourism-board.html>.

Sally Ashworth
Visit Lake Norman
Appointed By: DMANC

Kevin Baker
Piedmont Triad International Airport
Appointed By: Senate President Pro Tempore

Sabrina Bengel
Craven County TDA
Appointed By: Governor

Rolf Blizzard
Turnpike Properties
Appointed By: NC Travel & Tourism Coalition

Donna Carpenter
Cabarrus CVB
Appointed By: DMANC

Robert "Randy" Cobb
Abercrombie Oil Co., Inc.
Appointed By: NC Petroleum Marketers Assn.

Robert Danos
NC Youth Camp Association
Appointed By: Senate President Pro Tempore

Secretary Sharon Allred Decker (non-voting member)
NC Department of Commerce
Appointed By: NC Dept. of Commerce

S. Lewis Ebert
NC Chamber
Appointed By: NC Chamber

Denny Edwards
Greater Raleigh CVB
Appointed By: DMANC

Joel Griffin
Griffin Stafford Hospitality, LLC
Appointed By: NCRLA

Rep. Susi Hamilton
North Carolina House of Representatives
Appointed By: House Speaker

Sen. Ralph Hise
North Carolina Senate
Appointed By: Senate President Pro Tempore

Katherine Hopkins
North Carolina Watermen United
Appointed By: NCWU

Chris Humphrey
Allstate Insurance / ERA Humphrey Realty Group
Appointed By: Senate President Pro Tempore

Rep. Patricia McElraft
North Carolina House of Representatives
Appointed By: House Speaker

Caleb Miles
Pinehurst, Southern Pines, Aberdeen Area CVB
Appointed By: NCTIA

Lynn Minges
NC Restaurant and Lodging Association
Appointed By: NCRLA

Robert M. O'Halloran
East Carolina University
Appointed By: NCRLA

Tammy O'Kelley, Chairman
The Heart of North Carolina
Appointed By: House Speaker

Vinay Patel
SREE Hotels
Appointed By: Governor

Jessica I. Roberts
Greater Mt. Airy Chamber of Commerce
Appointed By: House Speaker

Sen. Norman Sanderson
North Carolina Senate
Appointed By: Senate President Pro Tempore

Arthur B. Schools Jr.
Former Mayor of Emerald Isle
Appointed By: Governor

Kathy Sparrow
North Carolina Watermen United
Appointed By: NCWU

Wit Tuttell (non-voting member)
Visit North Carolina, EDPNC
Appointed By: NC Dept. of Commerce

Chris Valauri
The Valauri Group, LLC
Appointed By: House Speaker

Paula Wilber
The Biltmore Company
Appointed By: NCRLA

Lynn Wingate
Washington TDA
Appointed By: NCTIA

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 consolidate and enhance North Carolina's marketing and recruitment functions, previously conducted by the North Carolina Department of Commerce. The partnership serves to oversee efforts in economic development, international trade, and tourism, film and sports development. Due to this transition, the Department of Commerce's Division of Tourism will henceforth be referred to as "Visit North Carolina."

2014: The Year in Review

North Carolina's tourism industry **outpaced the national growth rate*** and achieved record performance in 2014, with visitor spending increasing in 97 of the state's 100 counties and resulting in an all-time high \$21.3 billion in direct spending, a 5.5 percent increase over 2013. Spending by travelers directly supported 204,909 jobs for North Carolinians with a payroll of more than \$4.9 billion and generated more than one billion dollars in state and local tax revenues for reinvestment in communities all across North Carolina. In addition to topping the 200,000 mark for the first time, the 3.3 percent growth in tourism jobs was the largest increase in 14 years.

Partnerships with destinations, attractions, lodging and dining properties and associations statewide remain key to North Carolina's success. Despite a marketing budget ranking significantly lower than our competitor states, effective collaboration within the tourism industry contributed to North Carolina maintaining its position as the nation's sixth most-visited state.

Program Highlights for 2014

Employment generated by domestic and international travelers in North Carolina increased 3.3 percent in 2014. These travel-related jobs composed 5.2 percent of total non-agricultural employment in North Carolina during 2014.

On an average day in 2014, visitors in North Carolina spent \$58 million and contributed millions of dollars in state and local taxes.

While continuing to showcase the state's renowned scenic beauty and vibrant cities, Visit North Carolina's "Deeper Connections" message strategy provided the platform for sharing more stories about the distinctive places and experiences that make North Carolina more appealing to travelers.

In 2014, VisitNC.com was coming off a record year for traffic and engagement, while also settling into new trends in user behavior resulting from its responsive design reboot in July 2013. As it did so, Visit North Carolina closely monitored traffic and engagement metrics to determine which aspects were meeting or exceeding expectations and which required optimizations. The team applied these learnings to both enhance existing elements of the site and to guide new content and design decisions throughout 2014.

Whereas VisitNC.com was once designed to capture and keep visitors as long as possible, today its focus has shifted to inspiring visitors to learn more about a location and connecting them to partner websites to book or for more information. To do so, the site runs on a user-first approach, organizing content by interest, geography and inspiration in order to easily guide users to the answers of their questions. VisitNC.com ended 2014 with a record 5.4 million user sessions, driving a record 1.85 million downstream referrals to North Carolina industry partner websites.

**According to the U.S. Travel Association's "The Impact of Travel on State Economies 2014," domestic traveler spending increased 5.3% nationally. In North Carolina, domestic traveler spending increased 5.5%.*

Social media continued its growth in 2014, with total community reaching 154,824 users across platforms and engagement increasing 28 percent. Higher engagement on Facebook (up 38 percent) and Twitter (up 96 percent) and a follower increase of 375 percent on Instagram led to 55,070 social referrals to VisitNC.com.

Visit North Carolina cost-effectively enhanced its efforts to reach travelers increasingly planning travel online by shifting more of its investment to digital advertising, including a strategically selected mix of publishers and networks to drive brand awareness, site traffic and conversions for downstream referrals.

Proactive public relations efforts expanded Visit North Carolina's outreach to key audiences with a program that generated an advertising equivalency of more than \$12.1 million and a domestic audience of more than 1.1 billion. Public relations generated through outside agencies delivered a 36 to 1 return on investment.

Cooperative marketing programs with NC travel industry partners and effective partnerships with in-state media associations resulted in an estimated \$6 million in incremental direct investment, in-kind support and brand exposure for North Carolina and VisitNC.com within and outside the state.

The North Carolina Film Office continued to leverage the state's 25 percent tax credit for film, television and commercial production in its marketing to produce the 2nd highest total of in-state spending by productions in a calendar year in 2014. With regard to the amount paid out by the N.C. Department of Revenue as part of the refundable tax credit, NCDOR reported that as of April 28, 2015, 35 film projects had filed tax paperwork with the agency that totaled \$241,372,169 in direct spending while employing 8,183 people. The NCDOR report reflects only paperwork submitted between May 2014 and April 2015, includes numbers from projects that filmed prior to this timeframe and does not include all projects that actually filmed during this same timeframe. Based on forms filed with the N.C. Film Office by productions, it is estimated that total spending for 2014 topped \$316 million while affording North Carolinians more than 11,360 job opportunities.

Among the many 2014 highlights were the filming of seasons two of *Under the Dome* and *Sleepy Hollow*, season 3 of *Banshee*, the first season of *Secrets and Lies*, the second season of *A Chef's Life* and the first full season of *Love It or List It* to film outside of Canada, as well as the feature films *The Longest Ride*, *Max*, *Masterminds*, *The Disappointments Room*, and *The Choice*.

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 the ongoing partnership with the NC Department of Transportation and NC Department of Cultural Resources in the popular North Carolina Civil War Trails program, an expanded schedule for Visit North Carolina's Tourism Resource Assistance Center program and four regional Mid-Year Marketing Update sessions.

Visit North Carolina continued its collaboration with East Carolina University's Center for Sustainable Tourism and the Office of Economic Development to promote environmental and social responsibility throughout the state's tourism industry, including use of a staff member to help strengthen the state's leadership position in sustainability.

Please review the balance of this Annual Report for more details on Visit North Carolina's 2014 program of work and accomplishments. Visit North Carolina remains committed to its collaboration with partners statewide to ensure North Carolina's continued growth and success as a preferred travel, film and sports destination and positive economic force for the entire state.

2014 Results

Visitor Spending

In 2014, visitors to North Carolina spent a record \$21.3 billion in the state, an increase of 5.5 percent from 2013.

Domestic visitor spending directly supported more than 200,000 jobs for North Carolina residents and the tourism industry directly contributed \$4.9 billion to the state's payroll in 2014.

Traveler spending generated some \$3 billion in federal, state and local tax receipts. Local and state tax revenues, as a direct result of visitor spending, save each North Carolina household hundreds of dollars per year.

Ninety-seven of North Carolina's 100 counties experienced growth in visitor spending in 2014.

Mecklenburg County received \$4.9 billion in domestic travelers' expenditures, top in the state. Wake County ranked second with \$2 billion, followed by Guilford County with \$1.3 billion.

Orange and Cabarrus counties had the largest percentage increases at 7.7 percent and 7.6 percent respectively. Carteret County followed with a 7.3 percent increase, followed by Moore (+7.1 percent), Dare (+7.0 percent), Union (+6.9 percent), Buncombe (+6.8 percent), Beaufort (+6.6 percent), Iredell (+6.5 percent) and Wake (+6.5 percent) counties.

Mecklenburg County directly employs the most tourism employees with more than 48,000 and has the largest payroll at \$1.6 billion. Wake (21,143), Guilford (12,761), Dare (12,304) and Buncombe (10,227) counties each have more than 10,000 direct tourism employees.

Ninety percent of the state's counties saw direct tourism employment growth in 2014. Nearly all of the same counties that led growth in visitor spending also had the largest increases in direct tourism employment from 2013 to 2014. They were Cabarrus (+5.3 percent), Orange (+5.2 percent), Moore (+4.8 percent), Dare (+4.7 percent), Carteret (+4.7 percent), Union (+4.6 percent) and Buncombe (+4.5 percent) counties.

Source: U.S. Travel Association

2014 Travel Volume

North Carolina person-trip volume was 48.2 million in 2014. North Carolina ranked No. 6 in total domestic person-trip volume.

Source: TNS Travels America

2014 Total State Rankings by Volume

1. California
2. Florida
3. Texas
4. New York
5. Pennsylvania
- 6. North Carolina**
7. Georgia

8. Tennessee
9. Illinois
10. Ohio

Source: TNS Travels America

Average Trip Spending

North Carolina overnight visitor parties spent approximately \$557 per trip in 2014. Out-of-state visitors spent approximately \$746 per trip in 2014, 34 percent more on average per trip than resident visitors traveling within the state.

U.S. travel parties on average spent \$968 per trip in 2014.

Source: TNS Travels America

Average Overnight Trip Duration

The average length of stay of North Carolina visitors was 2.8 nights in 2014. Resident visitors stayed an average of 2.4 nights, while out-of-state visitors stayed an average of 3.1 nights.

U.S. travelers stayed an average of 3.3 nights per trip in 2014.

Source: TNS Travels America

North Carolina's Top States of Origin for Overnight Visitors

- NC 30.0%
- SC 9.2%
- FL 8.1%
- VA 7.9%
- GA 7.3%
- NY 4.3%
- TN 3.1%
- PA 3.0%
- OH 2.4%
- MD 2.4%

Source: TNS Travels America

NC's Activities for Overnight Visitors

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

Activities involving soft adventure and exploring the state's natural, scenic beauty are shared by the most visitors with 18% of visitors reporting that they went to a beach, 13% doing rural sightseeing, 11% exploring a state or national park, 7% viewing wildlife and 4% hiking or backpacking.

The state's natural, historic and cultural assets also were enjoyed by visitors with 9% reporting that they visited a historic site or church, 7% visiting museums and 4% going to art galleries.

Visitors also participated in traditional activities with 3% reporting that they played golf while on vacation and 3% reporting that they attended a youth, amateur, collegiate or pro sporting event.

North Carolina's beer and wine industries are a growing area of interest for visitors with 3% reporting that they visited a craft brewery and 3% visiting one of the state's many wineries.

Source: TNS Travels America

Visit North Carolina Budget Overview

Visit North Carolina, part of the Economic Development Partnership of North Carolina, was funded by appropriations from the General Assembly that were transferred to the EDPNC through a contract with the North Carolina Department of Commerce. The staff consisted of 18 FTEs while in Commerce, but was reduced to 13 FTEs in the EDPNC. Expenditures included:

Media Purchase & Production	\$5,424,570
Personnel & Administration	1,210,575
Research	270,000
Digital Marketing	1,718,680
International Marketing	725,000
Retire NC Marketing	18,000
Film	220,000
Public Relations	423,000
Group and Sports Events Marketing	260,000
Industry Relations	56,600
Printing/Production	80,000
Total	\$10,406,225

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. Additionally, the program leveraged more than 5,700 hours of inmate labor at the Call Center during its 364 days of operation last year. The program reduced 1.5 FTE's in 2014-15. Expenditures included:

Welcome Centers	\$1,826,430
Inquiry/Fulfillment	314,612
Total	\$2,141,042

State Tourism Office Budgets: 2014-15

According to the U.S. Travel Association, North Carolina's budget of \$10.1 million ranked 32nd in state tourism office budgets in 2014-15, significantly behind states that are direct competitors.

Budget Rank	State	Estimated 2014-15 Budget	Budget Percent Change
9	Virginia	20,756,965	+11.5
15	Tennessee	16,393,518	+4.3
17	South Carolina	14,925,359	+13.2
24	Louisiana	13,347,097	-6.8
25	Alabama	13,226,097	+22.0
28	Kentucky	11,271,060	+8.4
32	North Carolina	10,105,583	+1.9
39	Georgia	6,652,318	+0.1
40	Mississippi	6,628,649	+0.9

However, Visit North Carolina's "Beauty Amplified" campaign yielded a 15-to-1 return on the investment in advertising the state to prospective travelers, according to research results of a study by Longwoods International, which specializes in brand strategy and ROI research.

The Longwoods study surveyed 1,800 travelers in the Southeast and Mid-Atlantic markets to gather strategic data about respondents' perceptions of North Carolina as well as the effectiveness of the "Beauty Amplified" campaign in 2014. The study measured North Carolina's image as a travel destination versus key competitors, plus awareness and recall of the ads.

The study also provided bottom-line impacts of the campaign in terms of incremental trips and spending by visitors. In all, the study showed that the campaign drew 1.4 million incremental visits to the state with those travelers spending \$213 million. The same survey was run in 2005 when the N.C. tourism office's \$13.6 million budget was comparable to our competitors. The state was able to generate an additional \$123 million in spending.

	2014	2010	2005
Advertising budget	\$1,156,863	\$1,229,651	\$1,819,000
Trips generated due to ads	1,396,702	1,168,300	2,059,000
Additional spending generated	\$213,000,000	\$234,100,000	\$336,100,000

Among the study's findings were that every dollar the state invested in paid media advertising generated \$184 in new visitor spending, \$9 in new state tax revenues and \$6 in new local tax revenues. A 15-to-1 short-term return on an advertising investment "is outstanding and one of the best we have recently measured," according to Rick Cain, vice president of Longwoods International.

In another gauge of the campaign's effectiveness, 45 percent of all respondents recalled seeing at least one of the ads. And the advertising had a positive impact on North Carolina's image as a travel destination on every image factor.

Advertising

Print

Print advertising garnered more than 18,145,200 impressions for Visit North Carolina, with placements in more than 12 different publications. Top-performing publications included *Coastal Living*, *Country Living*, *Family Fun*, *Garden & Gun*, *Good Housekeeping*, *O, The Oprah Magazine*, *Southern Living* and *Woman's Day*.

Interactive

North Carolina's paid search marketing program continued to be successful throughout 2014. While overall site traffic remains important, ultimately Visit North Carolina wants users to interact with the site. Examples of those activities include ordering a Travel Guide, downloading a virtual partner brochure, and, most importantly, driving downstream visits to partners' sites from VisitNC.com. The campaigns are optimized to improve conversion by lowering the cost per activity to achieve high-level performance. In 2014, the paid search campaign generated 330,821 clicks to VisitNC.com, 148,208 activities and a \$1.29 cost per activity. These were all record numbers for paid search.

Digital

With the rapidly evolving propensity for researching, planning and booking travel across digital platforms, digital advertising continues to play an ever-increasing role in Visit North Carolina's communication mix.

In 2014, the digital media strategy was rooted in the following three objective areas and planned against accordingly:

1. **Branding & Awareness:** To increase exposure of the overall Visit North Carolina identity
2. **Site-Traffic Drivers:** To generate cost-efficient traffic to VisitNC.com and enhance site visitation
3. **Conversion Drivers:** To drive downstream traffic from VisitNC.com to partner sites and quantify travel intent

The overall digital planning approach remained on course, in which each seasonal round was planned and placed as an independent and focused campaign (winter, spring, summer and fall). Planning seasonally rather than placing one upfront 12-month campaign continued to allow for annual brand presence while providing more frequent checkpoints to: acclimate to seasonalities and ever-changing editorial concentrations; optimize both media vendor and creative mixes; increase and apply campaign-Over-campaign learnings and insights; and be more nimble and quick to respond to market and performance changes.

Each seasonal campaign comprised of a hybrid mix of targeted reach vehicles, travel-endemic players and niched-focused publishers. Leading performers from previous campaigns, such as Adara Media, Rocket Fuel, Quantcast, TripAdvisor and WeatherBug, provided a strong foundation for campaigns while supplemental partners were tested and optimized across the varying seasons, including Adtegrity, iExplore, Gravity, Scripps Networks and *USA Today*. Vendors, such as Pandora and Spotify, were also rotated into the fall mix to support an editorial focus around music.

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. Thirty-one partners were showcased in magazine insertions in:

- *Coastal Living*
- *Cooking Light*
- *Country Living*
- *Endless Vacation*
- *Family Fun*
- *Garden & Gun*
- *Good Housekeeping*
- *O, The Oprah Magazine*
- *Outside Magazine*
- *Southern Living*
- *The Local Palate*
- *Woman's Day*

North Carolina Ski Areas Association

Visit North Carolina also partnered with the North Carolina Ski Areas Association on a cooperative marketing campaign promoting GoSkiNC.com, running in January and December 2014. The January campaign included billboards in Greensboro/Winston-Salem and Atlanta, and both included cable television in the following markets: Atlanta, Charlotte, Columbia, Greensboro/Winston-Salem, Greenville/Spartanburg, Knoxville, Raleigh/Durham, Tri-Cities Virginia-Tennessee and Jacksonville.

Golf Travel Marketing

With more than 400 golf courses readily available statewide for public play, North Carolina is a leading destination for golf travel. With a goal of driving golf enthusiasts to relevant content, partner listings and special offers on VisitNC.com, Visit North Carolina developed and implemented a 2014 spring display campaign that consisted of three targeted players: Turner Digital, a top-performing network that provides relevant reach across PGA.com, Yahoo! Sports and Bleacher Report; Amazon, a bank of robust first-party shopping data to target and tap travel prospects; and Kontera, an engagement vehicle that delivers in-content ads based on contextual relevance.

VisitNC.com

Overview

As the state's official travel website, VisitNC.com hosted 5,396,023 user sessions, a 19.06 percent increase from 2013. VisitNC.com generated a total of 3,395,241 key performance indicator actions in 2014.

Key 2014 VisitNC.com Performance Indicators

- 80,625 site visitors participating in **sweepstakes**
- 39,661 **Travel Guides** ordered from website
- 12,342 downloads of **virtual brochures**
- 409,054 pageviews of individual **trip ideas**
- 106,410 new subscriptions to **eNewsletters**
- 484,470 site **searches** performed
- 175,779 clicks to view online **travel publications**
- 1,853,592 clicks to **partner websites**
- 31,095 clicks to view **special offers**
- 202,213 on-site **video views**

Display (Banner) Advertising

47 participating partners
10,328,969 total impressions
55,300 clicks to partner sites
0.54 percent click-through rate

Virtual Brochures

70 virtual brochures
12,342 downloads

Featured Event Listings

39 participating partners
147 total featured events
121,836 views of featured events
29,484 clicks to partner sites

Sweepstakes

17 participating partners/14 sweepstakes
80,625 total entries (homepage and golf sweepstakes included)

Most Popular Homepage Sweepstakes:

1. The Travel Guide in January (9,773 entries)
2. Crystal Coast in April (8,413 entries)
3. Crystal Coast in October (8,165 entries)

Most Popular Golf Sweepstakes:

1. Golf the Sandhills in February (8,333 entries)
2. Home of American Golf in January (4,477 entries)
3. Bald Head Island in March/April (3,756 entries)

International

Complementing VisitNC.com, five custom microsites appeal to prospective travelers in the markets that continue to be top international priorities for Visit North Carolina.

UK.VisitNC.com

13,047 visits

29,068 page views

2.23 average number of page views per visit

1:52 minutes, average visit duration

Microsite complemented by 22,835 additional visits directly to VisitNC.com from U.K. travelers

DE.VisitNC.com

12,080 visits

27,279 page views

2.26 average number of page views per visit

2:11 minutes, average visit duration

Microsite complemented by 10,082 additional visits directly to VisitNC.com from German travelers

JP.VisitNC.com

14,749 visits

22,823 page views

1.55 average number of page views per visit

1:04 minutes, average visit duration

Microsite complemented by 4,288 additional visits directly to VisitNC.com from Japanese travelers

MX.VisitNC.com

22,465 visits

42,886 page views

1.91 average number of page views per visit

1:42 minutes, average visit duration

Microsite complemented by 2,868 additional visits directly to VisitNC.com from Mexican travelers

QC.VisitNC.com

13,854 visits

24,948 page views

1.80 average number of page views per visit

1:35 minutes, average visit duration

Microsite complemented by 47,069 additional visits directly to VisitNC.com from Canadian travelers

Search Engine Marketing

VisitNC.com

17,814,862 total impressions
380,821 total clicks
\$0.758 average cost-per-click
\$1.29 average cost-per-KPI

Media.VisitNC.com

35,808 visits in 2014
1.55 average page views per visit
1:37 average time spent on site

SportsNC.com

13,552 visits in 2014
1.9 average page views per visit
1:13 average time spent on site

NCFilm.com

96,630 visits in 2014
2.6 average number of page views per visit
1:54 average visit 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 18,000 lodging, dining and attraction listings.
- Created and distributed a consistent program of eNewsletters, advisories and informational mailings.
- Incorporated more social networking efforts into the ongoing marketing program including Pinterest, Instagram and continued promotion of Project 543.

Public Relations

- In 2014, Visit North Carolina hosted visits from more than 50 journalists from around the globe and assisted hundreds of travel writers and reporters on stories involving travel to North Carolina.
- Distributed a dozen press releases with very successful pick-up.
- This work led to hundreds of articles, blog posts and broadcasts on North Carolina, reaching an audience of more than 1.1 billion people nationally and more than a billion internationally.
- Visit North Carolina also hosted group media tours of the state for both German and U.K. travel writers.

Other Highlights:

New York Media Mission

Visit North Carolina hosted its annual reception for national travel and lifestyle media at the New York Public Library in New York City on Tuesday, January 28. In partnership with 29 destinations and attractions from across the state, Visit North Carolina hosted more than 65 media, showcasing the best of North Carolina. The event was themed “A Taste of North Carolina” and featured top chefs, artisans and brewers from all three regions of the state. Special guest chefs created signature dishes and provided samples as well as visual opportunities for media guests to engage with social media including Instagram and Twitter. In addition, Visit North Carolina created a two-minute video with guest chef from Skylight Inn, Sam Jones, featuring the preparation of a whole hog barbecue then delivered to the New York Public Library in a taxi cab. The video featured Southern Foodways Alliance Director John T. Edge highlighting why North Carolina whole hog barbecue is the epitome of Southern tradition. The video was shared with media and consumers on YouTube and through the Southern Foodways Alliance Director’s letter. Visit North Carolina staff and partners met with key travel and lifestyle producers, writers and editors from many high-profile publications including: *Bon Appétit*, *CBS The Chew*, *Condé Nast Traveler*, *Every Day with Rachael Ray*, *Food & Wine*, *Good Housekeeping*, *ABC Good Morning America*, *Ladies’ Home Journal*, *Travel & Leisure* and *ABC’s The View*.

Washington, DC Media Mission

In April, Visit North Carolina, along with 16 partners from across the state, hosted a dinner for 12 regional and national journalists in Washington, D.C. The evening event included an overview of what’s new in the state plus important updates from each of the partners. The evening began with a cocktail reception featuring signature moonshine cocktails followed by a progressive dinner in which the partners rotated tables (and journalists) each course, allowing maximum face time and ensuring each partner had the opportunity to connect with all media present. Media outlets represented at the event included: *10 Best*, *American Food Roots*, *DC Modern Luxury*, *U.S. News & World Report* and *USA Today*.

OK! TV Features North Carolina Beer Month

Visit North Carolina welcomed broadcast host Karen Schaler of Travel Therapy for a taste of what’s brewing in North Carolina’s craft beer and filming scenes. The segment, which aired nationally on OK! TV and online on AOL and TravelTherapy.com, featured top craft beer experiences as well as celebrity favorite spots in the Piedmont to enjoy a cold brew.

North Carolina Beer Month

North Carolina's craft beer community continues to grow. Building upon a successful inaugural North Carolina Beer Month in 2013 in partnership with the Craft Brewers Guild, Visit North Carolina seized the opportunity and momentum by partnering with more breweries and creating more custom craft beer events for travelers to the state for the 2014 North Carolina Beer Month. Visit North Carolina also collaborated with Visit Charlotte and World Beer Cup award-winning NoDa Brewing Company to create the first-ever Brewmaster Sweepstakes, allowing craft beer enthusiasts the chance to become a brewmaster for a day, brew and name their beer and ultimately return to the brewery for the beer's release. Partnerships, events and offerings such as these led to recognizable results including:

- The second annual North Carolina Beer Month featured 25 DMO partners and double the amount of breweries from the inaugural year – 60 brewery partners.
- 602 media placements, including *New York Times*, *Travel + Leisure*, Yahoo!, The Daily Meal, AOL and OK! TV that generated 99,451,602 consumer media impressions and an advertising value of over \$1.19 million.
- 36,091 total visitors to www.ncbeermonth.com, up 56.85% from 2013 Beer Month.
- Over 2,500 entries in the first year offering of the Brewmaster Sweepstakes.
- #NCBeerMonth was used 21,892 times in social media postings with 180 photos uploaded to Instagram.
- Total of 45,417 unlocked badges on Untappd (up from 21,556 in 2013) resulting in more than 13,000 social posts reaching a potential of 6.8 million beer enthusiasts (up from 2.3 million in 2013).
- Hotel occupancy increased 4.1 percent statewide in April 2014 from April 2013, and room demand increased 4.6 percent statewide as well.

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, the North Carolina Outdoor Advertising Association and UNC-TV remain key to Visit North Carolina's ability to cost-effectively reach more than nine million prospective travelers in the state's own backyard.

North Carolina Association of Broadcasters

Member television and radio stations aired 36,040 spots representing a value of \$1,739,850.

North Carolina Press Foundation

One hundred seventeen papers published 1,225 ads representing a value of \$1,202,987.83.

North Carolina Outdoor Advertising Association

Fifty billboards were posted across the state generating 93,190,992 impressions representing a value of \$527,956.

UNC-TV

UNC-TV's award-winning team produced 52 weekly episodes of its popular show *North Carolina Weekend* during the past year. Each episode was broadcast statewide three times weekly with a potential audience of more than 13.4 million citizens of all ages, ethnic backgrounds and income levels in North Carolina and portions of Virginia, South Carolina, Tennessee and Georgia. The average rating for *North Carolina Weekend* in the Triangle area is 0.81, which is equal to PBS' primetime average for Thursday nights. The series featured more than 260 destinations, attractions and events across the state.

The series provides an overall value of \$1,075,835 for Visit North Carolina.

Each of these valued in-state media partners also provided additional exposure online for the state's messaging and VisitNC.com.

Visitor Services

North Carolina's nine Welcome Centers hosted 7,744,262 visitors in 2014. A breakout of the number of visitors by Welcome Center location is below:

2014 Welcome Center Estimated Visitors	
I-95 S	1,103,824
I-95 N	1,569,937
I-85 S	1,224,104
I-85 N	602,072
I-77 S	315,631
I-77 N	1,008,276
I-40 W	983,003
I-26 W	280,068
I-26 E	657,347
Total:	7,744,262

The I-95 North Welcome Center continues to be the most visited, hosting 1,569,937 travelers in 2014.

Welcome Centers registered nearly 15,000 visitors from other countries, including 9,776 from Canada.

In 2014, Welcome Centers booked about 16,000 room nights, representing total revenue of nearly \$1.4 million at an average rate of \$90.32 per room night.

Inquiry/Call Center

In 2014, Visit North Carolina received 3.5 million inquiries and mailed 194,459 NC *Travel Guides* to potential visitors.

2014 Inquiries

Reader Service	79,582
1-800-VisitNC Calls	25,417
Web Inquiries	3,395,241
Total	3,500,240

Publications

The Official 2014 North Carolina Travel Guide

The result of work throughout 2013, Visit North Carolina worked with Journal Communications to produce the *Official 2014 North Carolina Travel Guide* to serve as Visit North Carolina's primary fulfillment piece for potential visitors to and within the state. A photocentric design and state-of-the-art digital options brought a variety of interesting attractions to life in a handbook unique among state travel guidebooks. In fact, the *2014 Travel Guide* won the prestigious Mercury Award for Best Print Visitor Guide in the country, presented by the U.S. Travel Association's National Council of State Tourism Directors. Completely advertiser supported, the *Travel Guide* was produced at no cost to North Carolina's taxpayers with support of \$1 million from 104 partners.

Two covers were created for the guide, which included 885 attractions and more than 3,900 accommodations and travel resources in every county. One cover featured the North Carolina Zoo, highlighting the zoo's multiple gorilla babies, and the second cover showcased Pinehurst Resort to promote the United States Golf Association's U.S. Open and U.S. Women's Open Championships in 2014. The digital edition, available for Android and iOS, toggled between these two stunning images.

550,000 copies of the 174-page *Travel Guide* were distributed at North Carolina Welcome Centers, through VisitNC.com and 1-800-VISITNC, and by partners across the state and throughout the country.

Readers of the guide's print and online editions found abundant information presented in a design unlike that of any other state travel guide. The *Travel Guide* featured beautiful, large photographs and brief copy blocks on a variety of topics of interest to visitors, including festivals, cuisine, family fun, military and Southern culture. The pages were modeled after upscale consumer catalogs such as *Williams-Sonoma*, *Pottery Barn* and *Restoration Hardware* to appeal to North Carolina visitors, and incorporated new fonts and colors to reflect the new branding used on VisitNC.com. The print version directed readers to online extras, and the online edition linked directly to videos and related content.

NewsLink

Emailed weekly to 5,350 subscribers, *NewsLink* is an electronic publication designed to provide information to the tourism industry. The mailing list also included legislators, economic developers and media. In 2014, *NewsLink* covered 987 stories within the 51 weekly and one "Special Edition" issues, providing timely information on tourism-related research, statewide and international trends, media leads, updates on conferences and events, plus other items of interest to those in the tourism field.

There is no subscription charge for this e-newsletter and it is available to anyone with a valid email address and is only sent to those who have requested to receive the newsletter.

Domestic Marketing

American Bus Association (ABA) Marketplace, January 2014, Nashville, TN

ABA Marketplace is one of the premier industry events for the group travel industry, allowing Buyers and Sellers to meet face-to-face in pre-scheduled appointments. In addition to the quality appointments, Marketplace offers professional education seminars and numerous networking opportunities. At the 2014 Marketplace, Visit North Carolina:

- Teamed with 30 in-state partners to host 38 tour operators for dinner.
- Conducted 30 appointments with tour operators during the week, promoting group travel throughout the state.

Travel South Showcase, February 2014, Charleston, WV

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 15 travel industry partners and conduct strategic, business development meetings with more than 300 tour operators from more than 30 states plus Canada.
- Brief domestic and international media and 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.

Familiarization Tours

Annual Blue Ridge Parkway FAM Tour: In April 2014, Visit North Carolina partnered with Virginia and Tennessee to host a seven-day tour of the Blue Ridge Parkway with 26 AAA and CAA representatives from the United States and Canada. Spent several days with group in the Asheville, Haywood County, Chimney Rock and the High Country area.

Sales Mission

Twelve partners participated in a sales mission to Indiana, Kentucky and Ohio, visiting tour operators and AAA Auto Club offices. They traveled via executive motorcoach, inviting clients on to the coach to meet with partners in more authentic, personalized atmosphere, calling it "Office on Wheels." Also hosted a client dinner in Ohio for AAA representatives and tour operators.

International Marketing

International Web Traffic

Traffic to VisitNC.com from around the world continues to increase.

2014	U.K.	Germany	Japan	Quebec	Mexico
January	2,096	645	223	4,198	177
February	1,724	592	336	4,017	165
March	1,754	760	230	5,014	198
April	2,010	920	227	4,707	207
May	2,096	951	299	3,986	232
June	2,670	1,132	404	4,134	258
July	2,017	887	310	5,197	252
August	2,101	915	1,088	3,744	255
September	1,795	1,043	312	3,480	257
October	1,780	1,008	433	3,139	395
November	1,391	616	279	2,769	257
December	1,401	613	247	2,684	215
Total	22,835	10,082	4,388	47,069	2,868

UK: www.uk.visitnc.com
Germany: www.de.visitnc.com
Japan: www.jp.visitnc.com
Quebec: www.qc.visitnc.com
Mexico: www.mx.visitnc.com

Canada

- No. 1 international market with 521,776 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 \$125.2 million.
- Multiple daily non-stop flights to Charlotte Douglas and Raleigh-Durham airports

Canadian Sales & Marketing Accomplishments

- Visit North Carolina continued the cooperative marketing plan with Total Vacations and Merit Golf that feature areas across the state. In addition, developed new product with Golfstream Travel.

Cooperative Marketing & Advertising Opportunities

CAA: Visit North Carolina hosted a series of webinars to drive visitors to the state targeting all three regions.

Consumer Campaign with CIBC (Canadian Imperial Bank of Commerce)

My Dream Vacation had a yearlong run on the CIBC website offering NC products that inspired CIBC cardholders to redeem their points for NC vacation opportunities, including a 3 night getaway to Pinehurst. CIBC cardholders represent 220,000 professional, educated and affluent, occupying top positions in business, and 60 percent reside in Ontario.

Itravel2000 Co-operative Campaign:

Campaign targeted soft outdoor adventure, natural beauty and culinary. Visit North Carolina coordinated efforts with B2B trainings and partnered with Visit Charlotte to offer a 3-4 night holiday at the Westin Charlotte and passes to area attractions.

Results:

- 1.5 million impressions were achieved to influence Canadians to visit North Carolina
- 16.6 percent of bookings came from the Montreal market
- Flights were most popular into Charlotte via Air Canada & US Airways
- 2014 results included 51 PAX, 18 Petro Point redemption, 3.1 LOS
- Petro Points – 18 used their petro points to book NC travel

Consumer e-Newsletters: The Canadian office worked with Visit North Carolina to promote the monthly sweepstakes to a large Canadian database.

US Open Familiarization Tour: Hosted three journalists and three tour operators visiting one day at the US Open Championship in Pinehurst. Also experienced golf and attractions on the Brunswick Islands and in Raleigh.

Canadian Public Relations Results

- Fourteen journalists visited the state
- Coverage generated included 9.6 million circulation resulting in value of \$718,167
- Media desk visits with PR director
- Attended TMAC and Discover America Day events

Overseas Visitors

In 2014, North Carolina attracted more than 1.3 million international visitors who spent an estimated \$451 million in the state. Canada, the UK and Germany were the top countries of origin to the state in terms of visitor volume.

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

Rank	Country of Origin	2014 Est. Visitors	% change from 2013	2014 Total Spent	% change from 2013	Avg Spending per Visitor
1	Canada	521,776	+1.1%	\$125,284,908	-1.3%	\$240
2	United Kingdom	99,831	+15.2%	\$33,296,475	+2.2%	\$334
3	Germany	86,783	+8.1%	\$26,763,039	+5.9%	\$308
4	China/Hong Kong	44,891	+18.1%	\$33,918,955	+20.3%	\$756
5	India	39,502	+19.9%	\$14,586,976	+14.0%	\$369
6	Mexico	38,085	+11.6%	\$14,078,014	+6.6%	\$370
7	France	30,090	+14.2%	\$9,587,122	+0.6%	\$319
8	Japan	29,677	+5.4%	\$16,826,314	+13.2%	\$567
9	Brazil	21,996	-9.3%	\$9,513,586	-11.0%	\$433
10	Italy	15,390	+8.4%	\$7,012,467	+10.4%	\$456
11	Ireland	14,302	+22.3%	\$5,499,617	+14.1%	\$385
12	Australia	11,166	+9.8%	\$4,642,566	+9.5%	\$416
13	Spain	10,360	+11.7%	\$2,981,598	+5.0%	\$288
14	South Korea	10,049	+5.1%	\$4,280,210	-2.7%	\$426
15	Sweden	9,591	-2.8%	\$3,705,969	-2.0%	\$386
	TOTAL	1,305,582	+7.6%	\$451,216,760	+3.2%	\$346

* Spending only includes what is spent in North Carolina

** Canada is included in 2013-14 estimates, therefore totals should not be directly compared with reports prior to 2013

*** Visit North Carolina estimates based on extrapolations from government data and aggregate Visa usage data provided by VisaVue Travel for the period of calendar year 2014

North Carolina continues to rank in the top 20 most-visited states nationwide, according to estimates released by the U.S. Department of Commerce. The state ranked No. 16 in 2014.

Overseas ⁽¹⁾ Visitors To Select U.S. States and Territories: 2013-2014

2014 Rank	Destination (State/Territory)	2014 Market Share
1	New York	29.0
2	Florida	24.7
3	California	20.8
4	Hawaiian Islands	8.9
4	Nevada	8.9
6	Texas	4.5
7	Massachusetts	4.4
8	Illinois	4.0
9	Guam	3.9
10	New Jersey	2.8
10	Pennsylvania	2.8
12	Arizona	2.7
13	Georgia	2.5
14	Washington	1.8
15	Utah	1.6
16	Colorado	1.3
16	North Carolina	1.3
18	Virginia	1.2
19	Louisiana	1.1
20	Michigan	1.0
20	Ohio	1.0

(1) Excludes visitation from Canada and Mexico

Source: U.S. Department of Commerce, ITA, National Travel and Tourism Office, June 2015

U.K. and Ireland

- No. 1 overseas market with 99,831 visitors, up 15% over 2013.
- These visitors spent \$33.2 million.
- 3 daily non-stop flights to Heathrow.

Sales & Marketing Accomplishments

In addition to Visit North Carolina's co-op marketing with key tour operators in the U.K., Visit North Carolina teamed with Insight Vacations, a high-end group tour operator. Marketing activities included in-store travel agent flyers, full-page ads in *Travel Weekly*, targeted email blasts to past and prospective customers.

Trade Shows

- After a 5-year absence, Visit North Carolina joined other Travel South USA states exhibiting at WTM London

Familiarization Tours

- Visit North Carolina hosted **US Open Familiarization Tour** to Pinehurst, Asheville and Charlotte, in which three tour operators and one travel trade journalist participated.
- In conjunction with **Brand USA**, Visit North Carolina showcased North Carolina's cities, sport and mountain regions to eight tour operators/travel agents. These participants had to qualify with a test and have some knowledge of the region.
- **The Tour Operator Fam** in September featured coastal destinations such as Outer Banks, Crystal Coast and Wilmington. Five key tour operators participated, and the companies represented accounted for the largest amount of U.K. visitors to the state.

U.K. Public Relations Results:

- Visit North Carolina hosted nine individual journalists in 2014
- Distributed eight news releases
- Total circulation of 75,966,705 valued at \$4.1 million

Germany

- No. 2 overseas market with 86,783 visitors, up 8% over 2013.
- These visitors spent \$26.7 million.
- Supporting two daily non-stop flights to the state – one additional seasonal flight.

Sales & Marketing Accomplishments

Visit North Carolina conducted co-operative marketing with tour operators that included trainings and client evening presentations throughout Germany.

CANUSA Mapsite

In Visit North Carolina's continued partnership with tour operator CANUSA, Visit North Carolina increased North Carolina's product offerings. Continued with a MapSite, an online marketing tool to attract the attention of repeat customers and new travelers to our state. Since the beginning of Visit North Carolina's marketing partnership with CANUSA, there has been a double-digit increase in bookings annually.

Knecht Reisen

North Carolina was the featured destination in the Swiss tour operators, MOTORHOME catalog.

Hosted **US Open Familiarization Tour** to Pinehurst, Outer Banks and Charlotte, in which four trade and one journalist participated. The group attended the US Open on the final day seeing fellow German, Martin Kaymer, win.

Facebook & Twitter

With a following of nearly 1,118 in 2014, Visit North Carolina's German Facebook page highlights attractions, adventures and Project 543 blog posts. The German Twitter account has 330 followers.

Sales Mission focused on tour operators in Frankfurt, Cologne, Weinheim, Troisdorf and Rengsdorf, conducting trainings and co-op marketing.

Consumer & Travel Trade Shows

- CMT Stuttgart – January
- f.r.e.e. Munich – February
- Reisen Hamburg – February
- Messe Leipzig – November
- IPW – Chicago – April

German Public Relations Results:

- Visit North Carolina hosted nine journalists on visits to North Carolina
- Distributed 12 press releases to 682 media outlets
- Total coverage included a circulation of 12 million valued at \$3.8 million

Other International News

- American Airlines/US Airways merger resulted in some international flights being routed through other hub cities, but majority remained in CLT.
- Visit North Carolina hosted a double North Carolina booth at the U.S. Travel Association's IPW in Chicago. Industry partners from Asheville, Charlotte and the Outer Banks joined the state with more than 40 trade and media appointments.
- Visit North Carolina and its partners took part in Travel South International Showcase in New Orleans from Nov. 30 – Dec. 3 to meet with international tour operators and media to increase interest in international visitation to North Carolina. The group met with 80 tour operators from 17 countries along six continents. Visit North Carolina and Visit Charlotte hosted the closing night event as host sponsors for the 2015 Showcase.
- Through a partnership with Travel South USA, Visit North Carolina had limited PR and marketing representation in Brazil and France.

Tourism Development

The Tourism Development Manager continued to be involved in various initiatives to preserve and promote the various genres of traditional and heritage music 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, Department of Commerce's Division of Community Assistance, Department of Cultural Resources and NC Arts Council, NC Folklife Institute, Handmade in America, Homegrown Handmade and NC State Cooperative Extension to foster revitalization that will make the communities more attractive to residents and visitors. To do so, Visit North Carolina's Tourism Development team:

- Set goals for the Tourism Development Program and improved the delivery of information for the program on the Department of Commerce website. The effort is designed to make local communities more aware of resources within Visit North Carolina as well as other opportunities for tourism development.
- Gathered information for Visit North Carolina'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 North Carolina.
- Represented Visit North Carolina during the African American Heritage Commission planning meetings.
- Represented Visit North Carolina on the revamping and promotion of the Blue Ridge Music Trails of NC.

Tourism Resource Assistance Center (TRAC)

The Tourism Resource Assistance Center (TRAC) was developed along with the Industry Relation Manager to bring Visit North Carolina's program managers to local communities to discuss the nuts and bolts of working with Visit North Carolina.

TRAC sessions prior to 2014:

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

2014 TRACs:

1. Wilmington
2. Danbury – Stokes Co.
3. Pinehurst
4. Yadkinville

Community Partnerships and Heritage Development

Visit North Carolina 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 TDA development, marketing initiatives, heritage trails development and product development plans.

Blue Ridge National Heritage Area (BRNHA)

Created by congressional legislation, the BRNHA is supported through a partnership with Visit North Carolina to assist in coordinating planning for the 25 counties in the designated region. Visit North Carolina continued to assist in the implementation of the county initiatives outlined in each county's heritage plan, and has 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 North Carolina continued work on the Blue Ridge Music Trails of North Carolina with the BRNHA and the NC Arts Council to roll out the new book and map guide, as well as worked closely with the communities participating in the NC STEP Program through the NC Rural Center and the NC Main Street Program.

Appalachian Regional Commission (ARC)

Visit North Carolina also continued efforts with the Appalachian Regional Commission Tourism Council to develop a culinary guide of restaurants, agritourism farms, farm-to-table, restaurants, microbreweries and distilleries within the region. The guide was distributed in the 2014 spring issue of *Food Traveler Magazine*.

North Carolina Civil War Trails; Civil War 150th Commemoration

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. In 2014, Visit North Carolina, in partnership with the North Carolina Department of Transportation and North Carolina Department of Cultural Resources, continued to promote the NC Civil War Trails program in conjunction with the Sesquicentennial Commemoration. 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, and the map was also available via www.civilwartraveler.com.
- NC has 239 sites in 78 counties.
- Planning continued on marketing activities surrounding the 150th Commemoration of the Civil War (2011-2015).
- Visit North Carolina worked with the NC Civil War Tourism Council and informed communities, programs and sites of the opportunities related to the council such as “Watch Fire” annual publication and grants program.

Heritage Trails Development

- Assisted in the revamping of the Blue Ridge Music Trail, partnering with the Department of Cultural Resources, NC Arts Council, BRNHA and other communities in the region.

- Visit North Carolina worked with Department of Cultural Resources in the development of the African American Music Trail in the counties of Onslow, Lenoir, Craven, Pitt, Edgecombe, Wilson, Wayne and Greene.
- Contacted the Daniel Boone Heritage Trail Committee on possible resources and marketing opportunities.
- Visit North Carolina contacted the African American Heritage Commission in the development of “Freedom Roads” Heritage Trail, as well as worked on the committee for African American Heritage Celebration at the NC Museum of History.

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 that the state offers and established the N.C. Certified Retirement Community Program (**S.B. 1627**) as a vehicle to designate communities that offer this unprecedented quality of living that is sought 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 North Carolina will help market and promote the community.

- Visit North Carolina works with the Community Assistance office to administer and review applications.
- Visit North Carolina’s Tourism Development Manager continues to make presentations to local Commissions and City Managers on the guidelines, requirements and benefits of the program to increase participation (Currituck, Smithfield, Emerald Isle, New Bern, Lenoir and Leland).
- Visit North Carolina continued to promote certified communities and areas of NC during the AARP and Ideal Living Regional Expos in Boston, MA; Long Island, NY; Greenwich, CT, Parsippany, NJ and Washington, D.C.
- Visit North Carolina 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 North Carolina’s certified communities include:
 1. Lumberton (pilot program)
 2. Asheboro
 3. Marion
 4. Sanford
 5. Pittsboro
 6. Mt. Airy
 7. Eden
- 2014 CRC additions:
 - Edenton
 - Tarboro
 - Winterville

Industry Relations

Governor's Conference on Tourism in Charlotte (March 2-4)

Governor Pat McCrory spoke to more than 500 attendees during the conference at the Westin Hotel. Visit North Carolina's annual conference featured dynamic, educational programming and valuable networking opportunities and drew a record crowd. Governor McCrory presented the 2014 Winner's Circle Awards to five distinguished North Carolinians for their contributions to the growth and success of the tourism industry in the state.

Tourism Week in Raleigh (May 3-11)

Gov. McCrory proclaimed during the May 3-11 North Carolina Tourism Week that the travel industry had a record impact on the North Carolina economy in 2014, with more than \$21 billion in direct visitor spending, generating more than 200,000 tourism employment jobs. In addition, state tax receipts as a result of visitor spending topped \$1 billion.

Visit North Carolina 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 hosting a legislative breakfast, meeting with legislative representatives and closing with 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.

Regional Mid-Year Marketing Updates (September and October 2014)

Visit North Carolina went on the road again for its Mid-Year Marketing Update, offering several forums to make it easier for industry partners to participate and contribute to Visit North Carolina's planning efforts. MYMU brings together leaders from all sectors of North Carolina's travel industry to highlight recent performance trends, provide updates on Visit North Carolina's current marketing programs and co-op initiatives, and gain insight from partners to help fuel Visit North Carolina's strategic planning for the following year. 2014 events were held within all three regions of the state including Wilmington, Manteo, Asheville and Winston-Salem.

Sports Development

Visit North Carolina continued to enhance SportsNC.com website, promoting North Carolina's appeal as an attractive destination for sporting events of all kinds that provides sports-event rights holders and planners an easy connection to North Carolina Sports Association's (NCSA) 39-member destinations and organizations. As a presenting sponsor, SportsNC coordinated and led a cooperative effort with 35 sports sales directors and managers from North Carolina communities to market the state as a premier sporting event destination at Travel, Events and Management in Sports (TEAMS) Annual Conference. Efforts also included providing contact information for sports organizations, motorsports teams and professional sports teams in North Carolina, and attending quarterly NCSA quarterly meetings, giving updates on Visit North Carolina activities.

North Carolina Film Office (NCFO)

The North Carolina Film Office (NCFO) and regional film commissions promoted filmmaking in North Carolina at the annual Association of Film Commissioners International (AFCI) Locations tradeshow in Los Angeles and the AFCI Ceniposium Educational Conference in New York City. In 2014, the NCFO returned to the Sundance Film Festival in Park City, Utah, and also participated in the Producers Guild of America (PGA). Additionally, the staff made three marketing trips/sales calls to Los Angeles for meetings with multiple clients and attended a Film Commission Summit hosted by the MPAA in Washington, D.C.

The NCFO sponsored and hosted events and panel discussions at the Cucalorus Film Festival (Wilmington), RiverRun International Film Festival (Winston-Salem) and the Full Frame Documentary Film Festival (Durham), while promoting more than 25 film festivals held across the state. NCFO staff also made multiple speaking engagements at conferences and civic meetings.

2014 N.C. Department of Revenue Film Tax Credit Report*:

- 35 new projects
- \$241,372,169 in direct spend by productions that requested the film tax credit
- 8,183 people employed
- \$60,343,039 cost of credit

**The report issued by the NCDOR only reflects paperwork submitted between May 2014 and April 2015, includes numbers from projects that filmed prior to this timeframe and does not include all projects that actually filmed during this same timeframe.*

2014 Total Production Highlights from N.C. Film Office:

- 322 new projects
- 54 projects shot in North Carolina and registered with the NCFO
- \$316,285,473 direct spend by productions (second-highest year-end total)
- 3,780 production days
- 11,360 jobs created
 - 2,598 crew, 354 talent, 8,408 extras

Highlights of film projects during 2014 include:

- *Under The Dome (Season 2)* – Wilmington Region
- *Wicked Tuna: North vs. South* – Northeastern Region
- *Secrets and Lies (Season 1)* – Wilmington Region (with some day shoots in Charlotte)
- *Union Bound* – Research Triangle and Northeastern Regions
- *Max* – Charlotte, Western, and Piedmont Triad Regions
- *Field of Play (Pilot)* – Wilmington Region
- *Sleepy Hollow (Season 2)* – Wilmington Region
- *Max Steel* – Wilmington Region
- *Ashby* – Charlotte Region
- *Masterminds* – Western Region
- *Banshee (Season 3)* – Charlotte Region
- *A Chef's Life (Season 2)* – Eastern Region
- *The Longest Ride* – Wilmington, Eastern and Piedmont Triad Regions
- *Vacationland (Pilot)* – Wilmington Region
- *One & Two* – Piedmont Triad Region
- *The Choice* – Wilmington and Eastern Regions
- *The Disappointments Room* – Piedmont Triad Region
- *Blue Mountain State: Rise of Thadland* – Wilmington Region
- *My Big Fat Fabulous Life (Season 1)* – Piedmont Triad Region
- *National commercials for Taxslayer, Burger King, Honda, Lowe's, Pepsi, Purina, Xarelto*