



Annual Report on Status Of Travel and Tourism Industry in North Carolina

Citation of Law or Resolution: § 143B-434.2

Section Number: Section 14.3 (d)

Due Date: Oct. 15, 2011

Submission Date: Oct. 15, 2011

Receiving Entities:

The Joint Legislative Commission on Governmental Operations

The Fiscal Research Division

Submitting Entity:

Division of Tourism, Film and Sports Development

North Carolina Department of Commerce

2010 The Year in Review

Partnerships and resourcefulness paid dividends for North Carolina's travel industry in 2010 as the industry continued to combat the negative impacts of the worst economic recession since the Great Depression. North Carolina continued to strengthen its market share position as the sixth most-visited state in the U.S. despite a marketing budget ranking 22nd among the fifty states and all the economic challenges of the global economy that all destinations share.

Visitors to and throughout North Carolina spent a record \$17 billion across the state. This spending directly supported nearly 185,000 jobs for North Carolina residents and generated approximately \$1.5 billion in state and local tax revenues for reinvestment within local communities.

The result of collaborative efforts among the Division and its partners in all 100 counties across the state was to successfully grow market share in the face of difficult budget constraints that helps fuel a faster and stronger recovery than would be possible otherwise.

Program highlights for 2010

- VisitNC.com attracted record visitation with 3.66 million user sessions, a 3 percent increase over 2009. Benefits of this continued growth for the Division's industry partners included 1.17 downstream referrals to partner websites.
- The Division's expanded cooperative programs and continued partnership with in-state media associations resulted in an additional \$7 million in direct investment, in kind support and exposure for North Carolina's messaging within and outside the state.
- The "Simple Pleasures" advertising campaign strengthened its presence and impact in important neighbor states with an expanded radio effort generating nearly 12 million impressions and helping grow overnight visitation by 4 percent.
- North Carolina ranked 17th in the nation in 2010 in terms of market share of visitors from overseas, according to a report released by the International Trade Administration and Office of Travel and Tourism Industries in the U.S. Department of Commerce.
- North Carolina's wine industry continued to make headlines and attract visitors from near and far with the number of North Carolina wineries totaling more than 100 by year-end 2010.
- The Film Office aggressively leveraged the state's new 25 percent tax credit for film, television and commercial production to expand the industry's success throughout the state. Among numerous highlights in 2010 was the eighth season of production for *One Tree Hill* in the Wilmington area.

- The Division continued its collaboration with the North Carolina Sports Association and NC Amateur Sports to promote the state as an attractive destination for sporting events of all kinds. Sporting events are an important economic engine for small and large communities and are known to be a more resilient and dependable source of business in times of economic difficulty.
- The Division continued to support tourism development in small communities throughout the state in partnership with the NC Department of Transportation and NC Department of Cultural Resources on the popular North Carolina Civil War Trails program. An ongoing partnership with the Blue Ridge National Heritage Area showcased the Blue Ridge Parkway's 75th anniversary celebration.
- East Carolina University's Center for Sustainable Tourism and the Office of Economic Development partnered with the Division to promote environmental and social responsibility throughout North Carolina's tourism industry, including use of a staff member to help position the state's industry as a leader in sustainability.

We invite you to review more details on the Division's 2010 program of work and accomplishments in this Annual Report. As we look to the future, we will continue to work closely with our partners to help speed the travel economy's recovery and strengthen North Carolina's position as a premier travel, film, wine and sports destination.

2010 Results

Visitor Spending

- In 2010, domestic visitors to North Carolina spent a record \$17.0 billion in the state, an increase of 9 percent from 2009.
- Domestic visitor spending directly supported nearly 185,000 jobs for North Carolina residents, and the tourism industry directly contributed \$4.01 billion to the state's payroll in 2010.
- Traveler spending generated \$2.7 billion in tax receipts (\$1.2 billion in federal taxes, \$947.2 million in state tax revenue and \$545.9 million in local tax revenue).

Source: U.S. Travel Association

2010 Travel Volume

- North Carolina person-trip volume was 36.8 million in 2010, allowing the state to maintain its ranking as the nation's sixth most visited state. Domestic person-trip market share was 3.9 percent (4.3 percent for overnight visitors).

Source: TNS Travels America

2010 State Rankings By Volume

1. California
2. Florida
3. Texas
4. New York
5. Pennsylvania
6. **North Carolina**
7. Ohio
8. Nevada
9. Illinois
10. Georgia

Source: TNS Travels America

Average Trip Spending

- North Carolina overnight visitor parties spent approximately \$502 per trip in 2010. Out-of-state visitors spend significantly more than resident visitors traveling within the state (\$598 vs. \$325).
- U.S. travelers on average spent \$652 per trip in 2010.

Source: TNS Travels America

Average Overnight Trip Duration

- The average length of stay of North Carolina visitors was 3.3 nights in 2010. Resident visitors spent an average of 2.5 nights, while out-of-state visitors spent 3.8 nights on average, a slight increase from 3.7 in 2009.
- U.S. travelers spent an average of 3.4 nights per trip.

Source: TNS Travels America

NC's Top States of Origin for Overnight Visitors

NC	35%
VA	10%
SC	8%
GA	6%
NY	4%
PA	4%

MD	3%
TN	3%
NJ	2%
OH	2%
AL	1%

Source: TNS Travels America

NC's Top Activities for Overnight Visitors

Visiting relatives/family reunion	37.3%
Shopping	20.9%
Visiting friends	19.1%
Beach	17.9%
Fine dining	13.7%
Rural sightseeing	12.9%
State/national park	8.6%
Historic sites/churches	8.0%
Urban sightseeing	7.4%
Museums	6.6%
Wildlife viewing	5.8%
Old homes/mansions	4.7%
Fishing (fresh or saltwater)	4.2%
Hiking/backpacking	3.9%
Nightclubs/dancing	3.7%
Gardens	3.3%
Golf	2.9%

Bird watching	2.9%
Nature travel/ecotouring	2.7%
Art galleries	2.6%
Special events/festivals (e.g., hot air balloon races)	2.6%
Youth/amateur/collegiate sporting events	2.4%
Casino/gaming	2.4%
Biking	2.0%
Wine tasting/winery tour	1.8%
Whitewater rafting/kayaking/canoeing	1.7%
Theater/drama	1.6%
Zoos	1.6%
Spas/health clubs	1.6%
Camping	1.5%

Source: TNS Travels America

2010-2011 Budget Overview

For fiscal year 2010-2011, the North Carolina Division of Tourism, Film and Sports Development was funded by appropriations from the legislature in the amount of \$12.6 million, including approximately \$1.9 million for the state's nine Welcome Centers.

Media Purchase & Production	\$4,600,000
Personnel & Administration	1,880,600
VisitNC.com Development & Maintenance	900,000
International Marketing (Canada, Germany, UK)	830,000
Film Office Marketing	300,000
Inquiry Fulfillment	325,000

Public Relations	650,000
Domestic Sales Promotion	525,000
Industry Relations	300,000
Research	300,000
Printing & Production	150,000
Subtotal	\$10,760,600
Welcome Center Operation (9 centers)	1,873,300
Total	\$12,633,900

Projected State Tourism Office Budgets 2010-11

According to the U.S. Travel Association of America, North Carolina ranked 22nd in projected state tourism office budgets, with a core program budget of approximately \$11.0 million.

Ranking	State	Budget (<i>millions</i>)
1st	HI	\$83.0
2nd	CA	\$58.6
3rd	TX	\$36.1
4th	IL	\$34.2
5th	LA	\$32.0
6th	FL	\$29.4
7th	MI	\$27.4
8th	AK	\$18.7
9th	CO	\$18.1
10th	VA	\$16.7
11th	NM	\$14.5
12th	AR	\$13.3

13th	WI	\$13.0
14th	MO	\$12.3
15th	TN	\$12.1
16th	KY	\$11.9
17th	SD	\$11.6
18th	WY	\$11.4
19th	AL	\$11.3
20th	OR	\$11.2
21st	NV	\$11.2
22nd	NC	\$11.0
23rd	MT	\$10.8
24th	PA	\$10.6

Inquiry Fulfillment

1-800 VISIT NC

In 2010, the Division of Tourism received 3.6 million inquiries and mailed 174,687 NC Travel Guides to potential visitors.

2010 Inquiries

Reader Service	105,580
1-800-VISITNC Calls	33,741
Web Inquiries	3,661,377
Total	3,800,698

VisitNC.com

Overview

As the state's official travel website, VisitNC.com hosted **3,661,377** user sessions, a 2.56 percent increase from 2009. VisitNC.com generated a total of 3,250,010 web inquiries in 2010.

Key 2010 VisitNC.com Performance Indicators

- 227,365 site visitors participating in **sweepstakes**
- 63,314 **Travel Guides** ordered from website
- 157,224 downloads of **virtual brochures**
- 108,238 downloads of **itineraries**
- 144,751 new subscriptions to **eNewsletters**
- 1,328,189 **searches** performed
- 41,533 clicks to view online **Travel Guide**
- 1,169,271 clicks to **partner websites**

Electronic Communications

Relationships with visitors and prospective visitors are enhanced and strengthened through a number of electronic opt-in initiatives promoting destinations, attractions, new experiences, upcoming events and special offers that make a trip to North Carolina more attractive. The 2009 launch of the new Events eNewsletter was particularly successful. Its rapid growth to nearly 60,000 subscribers reflects the increasingly important role special events play in sparking leisure travel.

Monthly eNewsletters

15.29 percent average open rate
2.72 percent average click-thru rate
167,916 active subscribers at year-end

Events eNewsletters

31.85 percent average open rate
4.58 percent average click-thru rate
57,780 subscribers

eSpecials - Special Offers Newsletter

25.21 percent average open rate
3.40 percent average click-thru rate
13,249 active subscribers

Sweeps Support eNewsletters to Monthly eNews Subscribers

15.26 percent average open rate
4.62 percent average click-thru rate

Promotional – Paid eNewsletters for VisitNC Sweeps Support

22 placements: 16 dedicated newsletters, 6 promo slots
12.07 percent average open rate
2.73 percent average click-thru rate

Golf eNewsletters

15.19 percent average open rate
3.86 percent average click-thru rate
18,248 subscribers

Golf Sweeps Support eNewsletters to Golf eNews Subscribers

22.16 percent average open rate
12.05 percent average click-thru rate

VisitNC.com Partner Programs

Advertising opportunities on VisitNC.com were created as a cost-effective outlet to help industry partners extend marketing messages while creating synergy with the North Carolina brand. Below is a quick look at highlights from VisitNC.com partner program performance in 2009. Although not reported statistically for this report, videos have also taken hold as a popular partner opportunity.

Display (Banner) Advertising

102 participating partners
14,259,387 ad views of impressions delivered
0.85 percent average click-thru rate

Virtual Brochures

111 participating partners
174,613 downloads

Featured Event Listings

28 participating partners
64 featured events

73,606 views of event detail page
14,499 clicks from detail pages directly to partner site

Sweepstakes

15 participating partners/16 sweepstakes
233,828 total entries
39,077 qualified partner leads

Most Popular Sweepstakes

1. Fabulous Fun Fall Giveaways (10 weeks)
2. Carolina Beach Summer Sweeps
3. Going Green In Greensboro (Travel Guide Sweeps)
4. Lake Lure & The Blue Ridge Foothills
5. Wilmington Southern Style Sweeps

International

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

UK.VisitNC.com

60,700 visits
92,049 page views
2.16 average number of page views per visit
1:67 minutes, average visit duration
Most popular "Holiday" is Top Attractions
Microsite complemented by 23,409 additional visits directly to VisitNC.com from UK travelers

DE.VisitNC.com

20,111 visits
52,479 page views
2.61 average number of page views per visit
2:37 minutes, average visit duration
Most popular "Holiday" is Culture & Heritage
Microsite complemented by 8,888 additional visits directly to VisitNC.com from German travelers

JP.VisitNC.com

6,336 visits
15,963 page views
2.5 average number of page views per visit
2:26 minutes, average visit duration
Most popular "Holiday" is Culture & Heritage

MX.VisitNC.com

55,913 visits
96,857 page views
1.76 average number of page views per visit
1.01 minutes, average visit duration
Most popular "Holiday" is Best Beaches

QC.VisitNC.com

15,431 visits
39,591 page views
2.52 average number of page views per visit
2:00 minutes, average visit duration
Most popular "Holiday" is Best Beaches
Microsite complemented by 65,275 additional visits directly to VisitNC.com from Canadian travelers

Search Engine Marketing

VisitNC.com

28 ad groups, 494 keywords (plus placement & graphical ads)
294,613 clicks to VisitNC.com from paid efforts
\$0.41 average cost-per-click for these leads

Golf.VisitNC.com

46 ads, 161 keywords
34,958 clicks to Golf.VisitNC.com from paid efforts
\$0.64 average cost per click

UK, DE, JP, MX, QC sites

70 ads, 329 keywords
100,324 total clicks from paid efforts
\$0.13 average cost per click

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 approximately 15,000 lodging, dining and attraction listings.
- Completed development of new Partner Control Panel tool for VisitNC.com.
- Created and distributed a consistent program of eNewsletters, advisories and informational mailings.
- Incorporated more social networking efforts into ongoing marketing program.

Welcome Centers

North Carolina's nine Welcome Centers hosted 7,109,777 visitors in 2010. A breakout of the number of visitors by Welcome Center location is below:

2010 Welcome Center - Estimated Visitors

*I-95 S	1,144,895
I-95 N	1,638,067
I-85 S	572,840
I-85 N	676,621
I-77 S	311,069
I-77 N	1,015,560
I-40 W	746,551
I-26 W	348,249
I-26 E	655,625
Total	7,109,777

- The I-95 North Welcome Center continues to be the most visited, hosting 1,638,067 travelers in 2010.
- Welcome Centers registered 10,016 visitors from other countries, including 5,943 from Canada.

- In 2010, Welcome Centers booked 22,978 room nights, representing total revenue of \$1,836,401.76 with an average rate of \$79.92 per room night.

Publications

The Official 2011 North Carolina Travel Guide

The Official 2011 North Carolina Travel Guide was the primary fulfillment piece provided to potential travelers to and within the state.

- This 176-page publication featured the state's mountain, piedmont and coastal regions, with listings for 806 attractions and 3,913 accommodations.
- For the first time, the Travel Guide utilized a picture and tag line from the Division's advertising campaign. This continued the Division's marketing efforts toward the female, who makes the travel decisions, and also to visitors who want to be reminded to slow down and enjoy the simple pleasures of life.
 - 600,000 copies were produced at no cost to the Division or the taxpayers of N.C. as all costs for the production of the Travel Guide are paid for by partner advertising support.
 - 146 partners placed advertisements in the 2011 N.C. Travel Guide.

The Division also launched several new videos for the online version of the Travel Guide. By incorporating rich media, animated digital ads and embedded video features, the digital guide reaches and engages North Carolina's core customer with a unique online experience.

- 16,674 different visitors accessed the online guide, for an average of 1,390 per month.
- 176,022 viewings of videos launched, with a total average per month of approximately 14,668.
- 50,400 visits to view videos with an average time spent viewing of 1:13 minutes.

NewsLink

- E-mailed weekly to almost 2,300 subscribers, this electronic publication is designed to provide information to the tourism industry. The mailing list also includes legislators, economic developers and media.
- Covered 844 stories within the 52 weekly and three "Special Edition" issues.

- Provided timely information on Division activities, 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 the e-newsletter.

Domestic Travelers

Domestic Marketing

American Bus Association (ABA) Marketplace

January 2010, Philadelphia, PA

The Division was an active participant in ABA's Marketplace, which is one of the premier industry events for the group travel industry, allowing travel product buyers and sellers to meet face-to-face in pre-scheduled appointments. In addition to the quality appointments, Marketplace includes professional education seminars and numerous networking opportunities.

- Teamed with Visit Charlotte to host a Marketplace Luncheon for all delegates
- Organized a group of 37 in-state partners to host 25 tour operators for dinner
- Conducted 29 appointments with tour operators during the week, promoting group travel throughout the state

North Carolina Motor Coach Annual Meeting & Marketplace

January 2010, Durham

The Division participated in the NCMA Annual Meeting, which brings operator buyers and travel industry sellers from all over the United States together for one-on-one tour itinerary planning. The multi-day event also featured business training and professional development seminars.

Travel South Showcase

April 2010, Birmingham, AL

The Division coordinated North Carolina's section at TravelSouth Showcase, which is a regional appointment-style marketplace focused on increasing travel to and within the southern states. Showcase offers the

most targeted opportunity for tour operators / wholesalers and travel service providers to meet face-to-face with southern travel suppliers.

- Teamed with several travel industry partners, conducted strategic, business development meetings with more than 275 tour operators from more than 30 states plus Canada, the United Kingdom, Brazil and Japan
- Briefed 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 - Partnered with Virginia and Tennessee to host a seven-day tour of the Blue Ridge Parkway with AAA and CAA representatives from the United States and Canada. Spent two days with group in High Country.

Advertising

The Division's total paid media budget was approximately \$3.6 million with approximately 45 percent in print, 30 percent online and 25 percent in broadcast.

Print

Print advertising captured 90,640 inquiries and more than 50 million impressions for the Division from 54 ad placements in 27 different publications. Top-performing publications included *Good Housekeeping*; *Ladies Home Journal*; *Midwest Living*; *O, The Oprah Magazine*; *Southern Living*; *Better Homes and Gardens*; *Cooking Light*; and *Martha Stewart Weddings*.

Broadcast

Cost-effective seasonal investments in broadcast expanded the state's exposure to active travelers and included The Weather Channel and Travel Channel.

Radio campaign consisting of 30 sixty-second units showcased storytellers and events from around the state. Six-week schedule in the fall generated more than 11.5 million impressions in the Atlanta, Greenville/Spartanburg, Knoxville, Norfolk, Richmond, Roanoke and DC metro markets.

Interactive

A growing interactive plan incorporates search, CPM and CPC initiatives designed to drive traffic to VisitNC.com. Strongest-performing traffic drivers include Yahoo! Messenger, TripAdvisor, and weather.com. Custom eBlasts using subscriber lists from media outlets like *Budget Travel*, *Sherman's Travel* and *Family Fun* support monthly sweepstakes.

Cooperative Programs

The Division 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 partners were showcased in magazine insertions in:

- *Good Housekeeping*
- *The New York Times Sunday Magazine*
- *O, The Oprah Magazine*
- *Southern Living*

Collaborative efforts promoting North Carolina's Civil War Trails and complementary partner destinations and attractions across the state provided opportunities for 32 partner placements in *AAA World, Civil War Traveler* and *Preservation*.

Per-inquiry and direct-response television campaigns with Carolina Beach and Wrightsville Beach matched the Division's investment on a 1:1 basis, delivered more than 3,700 qualified leads and extended North Carolina's presence in broadcast.

Golf Marketing

With more than 550 golf courses statewide, North Carolina is a leading destination for golf travel. The microsite Golf.VisitNC.com remains the centerpiece of the Division's golf marketing efforts and partnerships with the Brunswick Islands, Currituck Outer Banks, Great Smoky Mountains Golf Association, the Pinehurst/Southern Pines/Aberdeen Area CVB and Pinehurst Resort added greatly to the program's overall reach and impact. These five sponsors benefited from a total of 190,282 views and 52,481 click throughs to their own websites, course listings, advertising messages and special offers during the year.

The 2010 campaign emphasized interactive media including The Golf Channel family of websites and public relations. Seasonal offers and golf packages promoted on Golf.VisitNC.com generated more than 40,000 opens and 15,000 click through to partner websites with an average click through rate of 38.31 percent. The subscriber base for the monthly golf

eNewsletter grew to more than 18,000, and four golf sweepstakes generated a total of 42,977 entries.

In-State 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 the Division'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 the Division'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 stations aired 11,455 Division spots representing a value of \$952,870.
- Member radio stations aired 24,723 spots representing a value of \$1,636,586.

North Carolina Press Foundation

- One hundred and twelve papers published 890 ads representing a value of \$670,468.31.

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 10.6 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 0.8 or 0.6 of a ratings point above the PBS prime time average rating of 1.3. The series featured more than 300 destinations, attractions and events across the state.

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

Public Relations

- In 2010, the Division hosted visits from 66 journalists from around the globe and assisted hundreds of travel writers and reporters on stories involving travel to North Carolina.
- This work led to more than 500 articles on North Carolina, reaching an audience of more than 340 million people.

- The Division's fall PR campaign, that included fall color, fall fishing and a broad array of events and activities, generated coverage for North Carolina, including a live broadcast with the Weather Channel's "Why I Love Fall" promotion. The campaign was seen by 2.2 million viewers and garnered 27 million online impressions, with an ad value of \$150,000.
- The Division hosted a Blue Ridge Parkway press tour in May for five German travel writers.
- The Division hosted a Movies and Motorsports press tour in September for 10 writers from the United Kingdom, Germany and Switzerland. The group visited Charlotte, Concord, Lake Lure and the Yadkin Valley.
- The Division led a Winter Activities press tour with NC Ski Association and High Country Host for six writers.
- The Division partnered with Cascade Highlands to host a Mayberry to Merlot press tour.
- The Division continually worked with state agencies and tourism partners during Hurricane Earl in order to minimize its impact on travel during an important holiday weekend.

More Highlights

New York Media Mission

The Division's PR team led a productive media mission to New York in January. The Division teamed with 20 partners from across the state to host 60 members of the media at an evening reception showcasing the best of North Carolina for 2011. In addition, Division staff and tourism partners participated in desk-side visits at select publications. Throughout the mission, staff and partners met with key travel and lifestyle producers, writers and editors, and shared what's new in North Carolina.

Charlotte Media Mission

In March, the Division's PR team hosted a successful media event at The Ballantyne in Charlotte. The Division teamed with more than 20 partners from across the state to host 30+ members of the media at an evening reception showcasing the best of North Carolina for 2011. The mission included in-state media from Charlotte, Greensboro and Winston-Salem and out-of-state media from Greenville, Spartanburg and Birmingham. At the event, staff and partners met with key travel and lifestyle producers, writers and editors, and shared what's new in North Carolina.

German Media Mission

In October, the Division conducted a sales and media mission in Germany and presented North Carolina to 19 media outlets in Frankfurt and Munich. Traditionally, international visitors spend more and stay longer than domestic visitors. With two daily direct flights to North Carolina, German Speaking Europe ranks third in international visitors to the state.

Tourism Initiatives

Tourism Development

North Carolina Civil War Trails

For the fifth year, the Division of Tourism, in partnership with the North Carolina Department of Transportation and North Carolina Department of Cultural Resources, utilized funding from a \$1.1 million federal transportation enhancements grant to develop, design, fabricate and install interpretive markers at campaign sites and corridors of the Civil War.

- The trail expanded to 232 sites in 78 counties at the end of 2010 with a goal to install more in the future.
- Visitors downloaded the Civil War Trails maps from www.visitnc.com and www.civilwartraveler.com with a total of 13,598 downloads.
- Planning continued on marketing activities surrounding the 150th Anniversary of the Civil War (2011-2015).
- Worked with Appalachian Regional Commission (ARC) and other 12 state representatives to develop a Civil War Map Guide titled "Civil War from the Home Front." The guide will be distributed in the 2011 spring issue of *American Heritage Magazine* as well as 26,000 overruns to the Division.
- The NC Civil War Tourism Council awarded grants for this year with \$5,000 going to ten organizations in our state.

Blue Ridge National Heritage Area (BRNHA)

Created by congressional legislation, the BRNHA is supported through a partnership with the Division to assist in coordinating planning for the 25 counties in the designated region.

- Continued to assist in the implementation of the county initiatives outlined in each county's heritage plan.
- Continued to take 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.

Community Development

The Division's Tourism Development program provides assistance and support to communities and tourism-related nonprofits to improve tourism product and capacity throughout the state. The program supports sustainable efforts to protect, preserve and promote the state's natural, historic and cultural resources by developing strategic partnerships with federal, state and local agencies and working with partners to provide sustainable tourism development education and resources. Among the Division's 2010 highlights:

- Supported the work of celebrating the Blue Ridge Parkway 75th Anniversary event.
- Worked closely with communities participating in the NC STEP Program through the NC Rural Center and the NC Main Street Program. Represented the Division during the NC Main St. Annual Conference in Shelby, NC.
- Worked with the Division of Community Assistance in (4) 21st Century Community Reconnaissance meeting.
- Continued work with the National Park Service on the feasibility study of the Southern Campaign of the American Revolution National Heritage Corridor proposal.
- 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 the Division as well as other opportunities for product development.
- Continued to be actively engaged in the development of outdoor recreational/ecotourism/agritourism 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.
- 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. Actively involved in ongoing programming, either independently or in conjunction with partners such as the NC Rural Center, Commerce's Division of Community Assistance, Dept. of Cultural Resources and Handmade in America to foster revitalization that will make the communities more attractive to residents and visitors.

- Helped gather information for the Division's film office, public relations, domestic marketing and international marketing programs.
- Made presentations on Cultural Heritage Tourism Development and how to work with the Division to partners throughout NC.
- Worked on new initiative along with Industry Relation Manager to develop the Tourism Resource Assistance Center (TRAC) that brings the Division's Tourism Managers to local communities to discuss the nuts and bolts of working with the Division.
- Working with Northeastern, Eastern & Southeastern Economic Development Regions on a proposal to designate the 40 counties as a National Heritage Area.
- Attended the National Trust for Historic Preservation Annual Conference.
- Attended the Rural Center Annual Conference in Raleigh, NC.
- Attended the African American Heritage Commission planning meeting at UNC-Chapel Hill.

International Travelers

Canada

Canada provides North Carolina's highest number of international visitors. Ease of access via highways and direct air service contributed to growth in the market.

- In 2010, overnight visitation from Canada was 379,600. More than 60 percent of overnight visitors came from the province of Ontario and 25 percent came from Quebec.
- Canadian overnight visitors spent \$123.6 million in North Carolina in 2010.
- Eighty-six percent of Canadian visitors come for vacations/leisure or to visit family and friends.
- The average length of stay per visitor party is 3.9 nights.

Canadian Sales & Marketing Accomplishments

Trade results:

- New Canadian tour operator packages were added in 2010, including:
 - Voyages Gendron featuring the October NASCAR race and CAA Tuxedo Tours to Asheville.
- In addition, 19 other tour operators continue to have ongoing programs in North Carolina.

- Developed a cooperative marketing plan with Total Vacations that feature Asheville, Charlotte, Greensboro, Winston-Salem, Raleigh and the Outer Banks.

Exhibited at the following trade shows:

- Toronto Golf & Travel Show
- Montreal Golf & Travel Show
- Ontario Motor Coach Association
- Bienvenue Quebec Conference
- Toronto Women's Show
- Montreal National Women's Show
- Zoomer tradeshow targeting men and women over 45 years old

Cooperative Marketing & Advertising Opportunities

- Takeoffeh.com – Offered 10 unique postings, which generated more than 250,000 consumer clicks.
- Ultimate Golf Vacations, in 43 store locations across Canada and online. Co-op marketing with Ultimate included six email newsletters to 41,000 people and a prize package. Total revenue \$40,047. Generated 198 room nights and 188 rounds of golf.
- Consumer E-Newsletters – Canadian office worked cooperatively with partners to increase NC awareness by sending out monthly newsletters to each group in our databases that were created from various promotions. Databases include – Golf, NASCAR, Senior and Generic. In total, six different newsletters went out, with a total reach of more than 36,000 consumers.
- Merit Golf Vacations – Club Link promotion resulted in 850 entries for a holiday to Pinehurst. 270 opted to receive more NC information.

Consumer Promotions

Promotion – *Toronto Sun* Racing Fans Guide NASCAR Contest

- Canadian office negotiated a promotion with *Toronto Sun* newspaper, which included a contest promotion that featured round trip airfare for two courtesy of Air Canada, accommodations, car rental and two tickets to the Coca-Cola 600 race, courtesy of the Charlotte CVB. The promotion ran for eight days in the newspaper including front-page mention on annual Racing Guide, banner ads, half-page and quarter-page ads, as well as editorial coverage including the opening of the new NASCAR Hall of Fame. Entries for the contest were online with a click-through to the North Carolina website.

- Total coverage \$117,785 in print and online space, reaching an audience of 2,621,373.
- We received 4,249 consumer contest entries, of which 155 opted in for more info on North Carolina.

Canadian Public Relations Results

Media Results:

- Ten journalists visited the state
- Media coverage: 87 million circulation resulting in value of \$551,000
- Hosted the McConnell Golf familiarization tour for journalists in May.

Overseas Visitors

In 2010, North Carolina attracted more than 343,000 overseas visitors, an increase of 11 percent from 2009, to rank 17th in the nation, according to a report released by the International Trade Administration and Office of Travel and Tourism Industries in the U.S. Department of Commerce.

- North Carolina was the fourth most popular southeastern state in the analysis, which uses in-flight surveys given to international passengers flying into the United States (excluding Canada and Mexico) to determine the destinations of the visitors.

Overseas* Visitors To Select U.S. States and Territories: 2009-2010

2010 Rank	Destination (State/Territory)	2009 Market Share	2009 Visitation (000)	2010 Market Share	2010 Visitation (000)	Volume Change (%)
1	New York	33.7%	8,006	32.8%	8,647	8%
2	Florida	22.2%	5,274	22.1%	5,826	10%
3	California	19.5%	4,632	21.3%	5,615	21%
4	Nevada	8.0%	1,900	9.5%	2,504	32%
5	Hawaiian Islands	7.8%	1,853	8.1%	2,135	15%
6	Guam	4.8%	1,140	5.0%	1,318	16%
7	Massachusetts	5.3%	1,259	4.9%	1,292	3%

8	Illinois	4.9%	1,164	4.5%	1,186	2%
9	Texas	3.8%	903	3.9%	1,028	14%
10	New Jersey	3.9%	926	3.7%	975	5%
11	Pennsylvania	3.7%	879	3.5%	923	5%
12	Georgia	2.9%	689	3.1%	817	19%
13	Arizona	2.8%	665	2.9%	765	15%
14	Washington	1.6%	380	1.9%	501	32%
15	Utah	**	**	1.8%	475	n.a.
16	Virginia	1.6%	380	1.4%	369	-3%
17	Colorado	1.4%	333	1.3%	343	3%
17	North Carolina	1.3%	309	1.3%	343	11%

* Overseas excludes Canada and Mexico.

** Estimates not shown due to sample size of fewer than 400.

n.a. Estimate not available.

Only destinations having a sample size of 400 or more are displayed. For more information concerning this statistical policy, please contact the Office of Travel and Tourism Industries.

This table shows only a portion of the 35 travel characteristics data reported on international arrivals to the United States. Additional information may be obtained for a fee. To learn more, please visit: <http://tinet.ita.doc.gov/research/programs/ifs/index.html>.

Source: U.S. Department of Commerce, International Trade Administration, Office of Travel and Tourism Industries.

Release Date: May 2011

UK and Ireland

Sales & Marketing Accomplishments

Blue Ridge Parkway Promotion & Ezine

To promote the 75th anniversary of the Parkway, this campaign was the largest consumer promotion to date. Combining an online e-magazine, partner eblasts, press trips and an advertorial with partners from Avis, American Airlines, *Jamie* magazine, Orange Telecommunications, World Travel Guide and Classic FM radio. Results were impressive. Total reach was 5,916,369 with 24,317 entering the contest and 20,224 requesting additional information on the state. Our investment of \$30,000 resulted in total campaign value of \$106,772.

Orange Beyond Broadband

In partnership with American Airlines and Carolina Vacations, the UK office teamed up to create a consumer campaign. The campaign reached more than 500,000 consumers through eNewsletters sent to customers of Orange Telecommunications. 5,481 consumers entered a North Carolina sweepstakes and 1,388 customers opted in to find out more about North Carolina.

Online Tactical Campaign

An online tactical campaign was launched to promote North Carolina as a destination for autumn travel in association with key travel partners. A promotional email was blasted out to more than 1 million consumers, and banners were placed on TripAdvisor and Travelpromos.

The total reach of the campaign achieved a total of more than 3 million impressions; America As You Like It recorded 230 holiday inquiries and 46 bookings during the period, and Bon Voyage received more than 10,000 click throughs to their North Carolina web pages. Campaigns are ongoing into 2011, with final results due.

Banner clicks led to the UK VisitNC website were more than 25,000 in September, an increase to average hits of more than 900 percent.

Product Development

Through sales and marketing activity, the UK office has assisted in developing new North Carolina travel programs with British Airways, Trailfinders and Timeless Travel in addition to extending existing hotel portfolios of existing North Carolina travel providers.

Familiarization Tours

Coastal Fam

The 2010 UK Fam ran May 11-15 with four partner tour operators and a trade journalist to the Crystal and Cape Fear coasts. A feedback survey was sent to all participants. All companies have since expanded their North Carolina offerings to include these areas. America As You Like It and North American Travel Service have extended their North Carolina programs, while Complete North America has launched a program for the first time.

Sales Mission (June 2010)

The UK sales mission ran June 13-17 with visits to London, Nottingham and Kent. Desk visits were made to key tour operators providing training and itinerary planning assistance. A Trade & Media dinner for 20 key UK contacts was also a great success.

UK Public Relations Results

Media visits

- Across IMVs and group press trips – total of eight media visited across the year:
 - Three individual media visits
 - Five media from group press trips

Coverage

- Series of articles included on popular UK websites – timesonline.co.uk and guardian.co.uk reaching a massive audience of 122,565,092 valued at \$743,522.

German Speaking Europe

Sales & Marketing Accomplishments

CANUSA iMagazine

To capitalize on the positive image North Carolina has in the German market, the Division teamed with leading tour operator, CANUSA, to promote NC with their small iMag. This marketing tool features our video, itineraries, postcards and maps and is distributed to their database of 510,000 customers. It was featured on the home page of their website for eight weeks in the prime long-haul buying time of early spring. It is

then archived on the website for another year. It was also promoted on www.de.visitnc.com.

E-newsletter

The North Carolina e-newsletter was sent out four times (April, June, September and November) to approx. 9,000 registered users.

Sales Mission

German Sales and Media Mission, October 29-November 5, to Frankfurt and Munich. Outside Frankfurt 10 presentations were given to 107 travel agents at VUSA Seeheim Seminar. In Munich, the Division attended the American Journal travel show. Additionally, the Division had appointments with key tour operators – Thomas Cook/Neckermann, Dertour, Meier's Weltreisen and FTI.

NC Department of Commerce Sales Mission

The Division of Tourism hosted a reception for 50 corporate leaders in the Munich area on April 27, during the Commerce Sales Mission. Governor Perdue, Secretary Crisco and Assistant Secretary Minges welcomed the group.

Trade & Consumer Shows

- ITB in Berlin in March 2010 – In total 26 trade and media appointments were scheduled and conducted.
- VUSA Travel agent event in Seeheim – October 2010
- American Journal Trade and Consumer Event – November 2010
- VUSA Seminar Vienna – February 2010
- VUSA Seminar Zurich – February 2010
- VUSA Consumer Show Leipzig – November 2010

German Public Relations Results

- Hosted four individual journalists; hosted five journalists on a group press trip
- Distribution of 12 press releases to 1,200 media outlets
- Met with 19 media in Frankfurt and Munich (October 2010) – 16 media at Breakfast in Hamburg and Munich (December 2010)
- Total coverage: circulation of 3 billion valued at \$3,010,271

Other International News

- **Sales Mission to France and Italy – October 2010**

Assistant Secretary Lynn Minges along with other Travel South partners met with 25+ tour operators, airlines and media in Paris. In Italy the group attended the TTG Incontri Trade Fair as part of the Discover America Pavillion.

- Transitioned to two new representative agencies in Germany and Canada
- New non-stop flights from US Airway's Charlotte hub:
 - Flight service to Rome from Charlotte began May 13
 - Service to Ottawa began on May 31
 - Year-round service to Puerto Vallarta and Los Cabos, Mexico began June 5
- The Division hosted a double North Carolina booth at TIA's International Pow Wow in Orlando, Fla., May 15-19. Industry partners from the Outer Banks, Asheville and Biltmore joined the state with more than 40 trade and media appointments.

Industry Relations

Governor's Conference on Tourism in New Bern (March 21-23)

Secretary Crisco revealed the 2009 tourism economic impact numbers to nearly 450 attendees at the Winner's Circle Luncheon at the Convention Center in New Bern. He announced that NC gained market share (from 4.3 percent to 4.4 percent) and remains the sixth most-visited state despite the economic downturn. Visitors spent \$15.6 billion in 2009, down 7.7 percent from 2008. Visitor spending generated more than \$1.35 billion in state and local tax revenue, generated a payroll of nearly \$4 billion and created 183,800 jobs for North Carolinians in 2009. Each North Carolina household saves approximately \$360 in state and local taxes as a result of taxes generated by visitor spending. The conference featured top tourism industry speakers, informative learning sessions, and concurrent breakout sessions.

Tourism Day in Raleigh (May 18)

Governor Perdue proclaimed May 18 as North Carolina Tourism Day. In downtown Raleigh, the Division supported the North Carolina Travel Industry Association in its successful effort to exhibit tourism attractions and destinations in the Legislative Building during the day and hosted an evening reception for policy makers at the N.C. Museum of Natural Science. North Carolina's nine Welcome Centers hosted their own events during National Tourism Week (May 8-16) to thank travelers to the state.

Mid-Year Marketing Update Online (September 21)

Assistant Secretary Lynn Minges and Director of Tourism Marketing Wit Tuttell updated more than 150 of the state's tourism industry leaders on September 22 through an online Mid-Year Marketing Update. They discussed highlights of recent North Carolina lodging research, state and national travel industry trends and the Division's marketing and co-op initiatives through the end of the current fiscal year. Also showcased were affordable partner marketing opportunities available for the balance of the current fiscal year. Never before held online, the new format eliminated the Update's nominal registration fee and allowed more partners from across the state to participate. Throughout the presentation participants were able to submit questions making the Update interactive.

Wine

Wine & Grape Council

- North Carolina is now home to more than 100 wineries in 47 counties across the state. The number of wineries has doubled since 2005 and grown more than five times over in the last decade. North Carolina currently ranks seventh in wine production nationwide and 10th in grape production. According to a recent study, the annual economic impact of the North Carolina wine and grape industry is \$813 million with 5,700 jobs created. Wine tourism has strengthened the state's economy and brings more than 800,000 visitors a year.
- NC Wine & Grape Council worked to promote North Carolina wineries, wines and fresh muscadine grapes locally, nationally and internationally through public relations and advertising.
- Produced 2010 NC Wineries Guide & Map featuring 96 wineries, and distributed 200,000 copies to travelers, tourism authorities, and welcome centers across the state and nation.
- Participated in N.C. Winegrowers Association and N.C. Muscadine Grape Association annual conferences.
- Partnered with North Carolina universities to sponsor six grape and wine research projects, including disease resistance, nutrient response and grape breeding.
- Participated in Media Missions to showcase the state's wines for the media in New York and Charlotte.
- Partnered with wineries on cooperative outdoor advertising campaign and rebranded all outdoor in 2010 to "Discover NC Wines."
- Upgraded the N.C. wine consumer website, visitncwine.com, with additional content about the industry and its history, and improved site navigation, events calendar and mapping features.

- Wine & Grape Appreciation Month, September 2010 – Governor Perdue declared September 2010 Wine and Grape Appreciation Month in a proclamation praising North Carolina's wine and grape community. The Council hosted Grape Day at the State Farmers Market in Raleigh partnering with wineries offering tastings and fresh grape samples.
- Partnered with North Carolina State Fair to host 2010 NC State Fair Wine Competition in October. More than 450 commercial wines and 100 amateur wines were entered, as the competition broke previous records for most wines entered and medals awarded. The council displayed award winners and distributed winery brochures during the 2010 NC State Fair.

Film

- The state Film Office and regional film commissions promoted filmmaking in North Carolina at the annual Association of Film Commissioners International (AFCI) locations tradeshow in Santa Monica, California.
- The NCFO participated at the Sundance Film Festival and promoted NC film.
- The NCFO participated at the Tribeca Film Festival and promoted NC film.
- Fifty productions including features, television, commercials, and single episodes filmed in North Carolina in calendar year 2010; collectively these productions spent approximately \$75 million in North Carolina.
- Highlights of film projects during 2010 include:
 - *One Tree Hill* began production on its eighth season in Wilmington
 - *The Shunning*, a TV movie, was filmed in the Piedmont Triad
 - *Bolden*, an independent feature, was filmed in Wilmington
 - *Playing With Guns*, a TV pilot, was filmed in Wilmington
 - *A Cinderella Story*, a TV movie, was filmed in Wilmington

Sports

- Continued to enhance sportsnc.com website, promoting North Carolina's appeal as an attractive destination for sporting events of all kinds and provides sports-event rights holders and planners an easy connection to NCSA's 24-member destinations and organizations.
- Coordinated and led a cooperative effort with sports sales directors and managers from North Carolina communities to market the state as a premier sporting event destination at the following trade shows: Travel, Events and Management in Sports (TEAMS); National Association of Sports Commissions (NASC); Amateur

Athletic Union (AAU); United States Sports Specialty Association (USSSA); National Soccer Coaches Association of America (NSCAA); National Softball Association (NSA) Convention; and the U.S. Youth Soccer Association (USYSA) Annual Meeting.

- Partnered with Charlotte to host 2010 TEAMS conference. The event brought hundreds of participants from all across the United States to Charlotte. Exhibited and held meetings with over 50 rights holders/decision makers for numerous sporting events, promoting North Carolina.
- Partnered with North Carolina Amateur Sports to coordinate statewide sports-related events, including: Cycle North Carolina Mountains to the Coast Fall Ride, Cycle North Carolina Spring Weekend Ride, State Games of North Carolina and the North Carolina Senior Games.
- Provided contact information for sports organizations, motorsports teams and professional sports teams in North Carolina.
- Attended quarterly North Carolina Sports Association meetings.

Contacts

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 Appointed by: DMANC

[2011 North Carolina Travel & Tourism Board Listing](#)

2010 NC Film Council

Chair: Bob Seligson, Raleigh Mayor William Bell, Durham Timothy M. Bourne, Wilmington Hilarie Burton, Wilmington John Wesley Davis IV, Winston-Salem Mark de Castrique, Charlotte Eugene W. Ellison, Asheville Craig Fincannon, Wilmington Monty Hagler, High Point Stephen B. Hill, Kinston Cress Horne, Marshville Betsy Jordan, Wilmington	Vice-Chair: E.A. Tod Thorne, Charlotte Donna E. Mack, Raleigh NC State Rep. Daniel F. McComas, Wilmington Thom Mount, Durham/Beverly Hills, Calif. James M. O'Brien, III, Raleigh Dale Pollock, Winston-Salem Jason Rosin, Wilmington Herman A. Stone, Charlotte Kelly R. Tenney, Castle Hayne Bill Vassar, Wilmington Rep. William L. Wainwright, Havelock Robert E. Zaytoun, Raleigh
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2010 NC Wine & Grape Council

Ed Cook, Matthews Jerry Douglas, Asheville Mark Friszolowski, Lexington Bill Hatcher, Raleigh Michael Helton, Yadkinville Robert Hinnant, Pine Level	Frank Hobson, Boonville Kim Myers, Hamptonville Joe Neely, Mocksville Buddy Norwood, Dobson Dan Smith, Wagram
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