



## 2013 Annual Report

North Carolina Division of Tourism, Film and Sports Development

The mission of the North Carolina Division of Tourism, Film and Sports Development 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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## **2013 NC Travel and Tourism Board**

*Listed here is the Board for the year 2013 as required for the 2013 Annual Report. For information on the current board, please go to <http://partners.visitnc.com/directories/travel-tourism-board.html>.*

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

Sabrina Bengel  
City of New Bern  
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

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

Diane Nordstrom  
Currituck County Department of Travel & Tourism  
Appointed By: DMANC

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

James "Jamie" Reibel  
Sargasso Travels, Inc., Phideaux Fishing  
Appointed By: NCWU

Leonard Rigsbee  
Cap-N-Squid Boatworks  
Appointed By: NCWU

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.  
Town of Emerald Isle  
Appointed By: Governor

Wit Tuttell (non-voting member)  
NC Department of Commerce  
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

## **2013 NC Film Council**

**Chair:** Bob Seligson, *Raleigh*

**Vice-Chair:** E.A. Tod Thorne, *Charlotte*

Mayor William Bell, *Durham*

Tricia A. Cotham, *Raleigh*

John Wesley Davis, *Winston-Salem*

Mark de Castrique, *Charlotte*

Terri E. Dollar, *Raleigh*

Eugene W. Ellison, *Asheville*

Craig Fincannon, *Wilmington*

Fred Griffith, *Raleigh*

Monty Hagler, *High Point*

Stephen Hill, *Kinston*

Cress Horne, *Marshville*

Marcie D. Kelso, *Matthews*

Daniel F. McComas, *Wilmington*

Michael McGaha, *Hampstead*

James M. O'Brien III, *Raleigh*

Dale Pollock, *Winston-Salem*

Jason Rosin, *Wilmington*

Zeb Smathers, *Canton*

Herman A. Stone, *Charlotte*

Kelly R. Tenney, *Castle Hayne*

Bill Vassar, *Wilmington*

Dale Williams, *Wilmington*

Robert E. Zaytoun, *Raleigh*

## **2013: The Year in Review**

North Carolina's tourism industry *outpaced the national growth rate* and achieved record performance in 2013, with visitor spending increasing in 95 of the state's 100 counties and resulting in an all-time high \$20.2 billion in direct spending, a 4 percent increase over 2012. Spending by travelers directly supported 197,700 jobs for North Carolinians with a payroll of \$4.6 billion and generated \$1.597 billion in state and local tax revenues for reinvestment in communities all across North Carolina.

Partnerships with destinations, attractions, lodging and dining properties and associations statewide remain key to North Carolina's success. Despite a marketing budget ranking 32<sup>nd</sup> among the 50 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 2013**

Total domestic travel employment increased 2.4 percent. These travel-related jobs composed 5.1 percent of total non-agricultural employment in North Carolina during 2013. Without these jobs, North Carolina's 2013 unemployment rate of 8.0 percent would have been 4.4 percentage points higher, or the equivalent of 12.4 percent of the labor force.

On average, visitors in North Carolina spent \$55 million and contributed \$4.4 million in state and local taxes every day. As a result, the tax burden for all North Carolina households was reduced by \$435.

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

In response to growing demand for responsive user experience across different devices, and with mobile visitation nearing 40 percent of traffic, a new VisitNC.com launched in July of 2013. The new site was created with a content-first mentality, designed and organized to help users find information how and where they want it. VisitNC.com ended 2013 with a record 4.5 million user sessions, driving 1.09 million downstream referrals to North Carolina industry partner websites.

The new VisitNC.com appeals to user behavior and web best practices with an abundance of photography and video. The Division produced "Deeper Journey," a video highlighting the scenic beauty across the state, as well as overview videos for golf and fall color.

Across the entire VisitNC.com family of sites, 2013 saw 4,797,447 user sessions to industry partner sites.

Social media continued its growth in 2013, with total community reaching 113,066 users across platforms and engagement increasing 76 percent. Higher engagement on Facebook (up 93 percent), Twitter (up 133 percent) and Instagram (up 149 percent) led to 24 percent more social referrals to VisitNC.com.

The Division 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 the Division's outreach to key audiences with a program that generated an advertising equivalency of more than \$5.5 million and a domestic audience of 570 million providing a 20 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 Film Office continued to leverage the state's 25 percent tax credit for film, television and commercial production in its marketing to produce record results. Collaborative efforts with partners statewide led to more than \$256 million in direct spending and more than 25,000 jobs created, including 4,000 well-paying crew positions for the state's highly skilled work force. Among the many 2013 highlights were the filming of *Under the Dome* season one, *Tammy* and *Homeland* season three.

The Division's partnership with the North Carolina Sports Association and NC Amateur Sports 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 the Division's Tourism Resource Assistance Center program and four regional Mid-Year Marketing Update sessions.

The Division 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 the Division's 2013 program of work and accomplishments. The Division 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.

## **2013 Results**

### **Visitor Spending**

In 2013, visitors to North Carolina spent a record \$20.2 billion in the state, an increase of 4.2 percent from 2012.

Domestic visitor spending directly supported 198,270 jobs for North Carolina residents and the tourism industry directly contributed \$4.61 billion to the state's payroll in 2013.

Traveler spending generated \$3.2 billion in tax receipts (\$1.4 billion in federal taxes, \$1.01 billion in state tax revenue and \$597.3 million in local tax revenue).

Local and state tax revenues, as a direct result of visitor spending, save each North Carolina household approximately \$435 per year.

Ninety-five of North Carolina's 100 counties experienced growth in visitor spending in 2013.

Mecklenburg County received more than \$4.6 billion in domestic travelers' expenditures, top in the state. Wake County ranked second with nearly \$1.9 billion, followed by Guilford County with \$1.2 billion.

Buncombe and Burke counties had the largest percentage increases at 8.0 percent and 7.6 percent respectively. Carteret County followed with a 7.4 percent increase, followed by Henderson (+6.8 percent), Wilkes (+6.2 percent), Forsyth (+5.9 percent) and Durham (+5.8 percent) counties.

Mecklenburg County directly employs the most tourism employees with more than 46,000 and has the largest payroll at \$1.5 billion. Wake (20,270), Guilford (12,450) and Dare (11,750) counties each have more than 10,000 direct tourism employees.

The same counties that led growth in visitor spending also had the largest increases in direct tourism employment from 2012 to 2013. They were Burke (+5.8 percent), Buncombe (+5.0 percent), Carteret (+4.5 percent), Henderson (+4.4 percent), Wilkes (+4.4 percent) and Durham (+4.1 percent) counties.

*Source: U.S. Travel Association*

### **2013 Travel Volume**

North Carolina person-trip volume was 52.5 million in 2013. North Carolina ranked No. 6 in total domestic person-trip volume.

*Source: TNS Travels America*



## **2013 Total State Rankings by Volume**

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

*Source: TNS Travels America*

## **Average Trip Spending**

North Carolina overnight visitor parties spent approximately \$517 per trip in 2013. Out-of-state visitors spent significantly more than resident visitors traveling within the state (\$574 vs. \$387).

U.S. travel parties on average spent \$613 per trip in 2013.

*Source: TNS Travels America*

## **Average Overnight Trip Duration**

The average length of stay of North Carolina visitors was 2.7 nights in 2013. Resident visitors stayed an average of 2.1 nights, while out-of-state visitors stayed an average of 2.9 nights.

U.S. travelers stayed an average of 3.3 nights per trip in 2013.

*Source: TNS Travels America*

## **North Carolina's Top States of Origin for Overnight Visitors**

- NC 30.4%
- SC 8.4%
- FL 7.5%
- VA 7.1%
- GA 6.6%
- PA 4.7%
- NY 4.3%
- TX 3.4%
- OH 2.9%
- TN 2.7%
- NJ 2.7%

*Source: TNS Travels America*

### NC's Top Activities for Overnight Visitors

Visiting relatives	34%
Shopping	22%
Visiting friends	19%
Beach	19%
Rural sightseeing	16%
Fine dining	15%
Historic sites / churches	11%
State / national parks	11 %
Urban sightseeing	10%
Museums	10%
Wildlife viewing	7%
Old homes / mansions	7%
Hiking / backpacking	5%
Gardens	5%
Nightclubs / dancing	4%
Nature travel / eco-touring	4%
Art galleries	4%
Bird watching	4%
Fishing (fresh or saltwater)	4%
Casino / gaming	3%
Camping	3%
Special events / festivals	3%
Wine tasting / winery tour	3%
Golf	3%
Theme park	3%
Biking	3%
Theater / drama	2%
Spa / health club	2%
Craft breweries	2%
Musical theater	2%
Zoos	2%
Whitewater rafting / kayaking / canoeing	2%
Youth / amateur / collegiate sporting event	1%
Motorboat / jet ski	1%
Symphony / opera / concert	1%

Source: TNS Travels America

## NC Division of Tourism Budget Overview

The North Carolina Division of Tourism, Film and Sports Development was funded by appropriations from the General Assembly. Expenditures included:

Media Purchase & Production	\$4,200,000
Personnel & Administration	2,118,000
Welcome Centers	1,909,200
Interactive	1,800,000
International Marketing	655,000
Inquiry/Fulfillment	245,000
Film	340,000
Public Relations	400,000
Domestic Sales Promotion	300,000
Industry Relations	70,000
Research	200,000
Printing/Production	100,000
<hr/>	
Total	\$12,337,200

## Projected State Tourism Office Budgets: 2013-14

According to the U.S. Travel Association of America, North Carolina, with a budget of approximately \$10.0 million, ranked 32nd in projected state tourism office budgets in 2013-14.

Rank	State	Estimated 2013-14 Budget	Percent Change
1	Hawaii	\$ 82,000,000	+15.5
2	Florida	69,556,042	+22.1
3	California	60,379,016	-3.0
4	New York	60,000,000	+215.8
5	Illinois	51,477,609	+1.2
6	Texas	42,503,619	+4.2
7	Michigan	31,440,000	+14.6
8	Arizona	24,723,353	+22.8
9	Virginia	20,814,380	+19.7
10	Tennessee	19,200,400	+79.6
11	Louisiana	18,768,245	-18.0
12	Alaska	18,700,000	+0.0
13	South Carolina	17,337,043	+38.2
14	Arkansas	16,919,142	-0.4
15	Massachusetts	15,900,000	+24.2
16	Nevada	15,340,702	+7.5
17	Wisconsin	15,232,200	+2.0
18	Colorado	15,000,000	+10.0
19	Oklahoma	14,286,994	+7.4
20	Montana	14,243,528	-2.4
21	Minnesota	13,928,000	+62.8
22	Oregon	13,725,000	+7.5
23	Utah	13,401,150	+27.3
24	Missouri	13,024,956	+12.9
25	Connecticut	12,795,901	+24.5
26	South Dakota	12,665,000	+1.5
27	Alabama	11,632,431	+16.5
28	Wyoming	11,626,134	-9.1
29	Maryland	11,426,332	+7.8
30	Kentucky	10,588,000	-7.9
31	New Mexico	10,332,300	+24.5
32	North Carolina	9,914,457	-1.6
33	Maine	9,271,000	+4.6
34	New Jersey	9,000,000	0.0

## **Advertising**

### **Print**

Print advertising garnered more than 18,631,200 impressions for the Division, with placements in more than 20 different publications. Top-performing publications included *Better Homes and Gardens*, *Country Living*, *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 2013. While overall site traffic remains important, ultimately the Division 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 2013, the paid search campaign generated 232,317 clicks to VisitNC.com, 48,191 activities and a \$2.87 cost per activity. Custom email campaigns using subscriber lists from preferred media outlets such as Dunhill Travel, *Backpacker*, *Golf Digest* and Shermans Travel supported monthly sweepstakes. The Division also ran paid email programs in the fall and spring to help drive seasonal traffic to VisitNC.com. All paid emails collectively drove 94,197 visitors to VisitNC.com throughout 2013.

### **Digital**

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

Primary digital campaign objectives remained streamlined across the 2013 year, even with the relaunch of VisitNC.com in July. Goals and strategy were rooted in driving cost-efficient and qualified traffic to VisitNC.com with the ultimate goal of quantifying travel intent through robust tracking of downstream traffic to partner sites.

With campaign goals intact, there was an opportunity to evolve the overall digital planning approach – to become more strategic in acclimating to seasonalities and ever-changing editorial concentrations, to increase campaign learnings and insights, to maximize grounds for testing and optimization, and to become even more nimble and responsive to market and performance changes. What was a 12-month planned campaign with spring and fall heavy-up transitioned into planning and buying each individual season as its own dedicated campaign – allowing for continued annual Brand presence while providing more frequent checkpoints to robustly optimize media and creative.

Each seasonal campaign comprised of a hybrid mix of targeted reach vehicles, travel-endemic players and niched-focus publishers. Continually leading performers from previous campaigns, such as Rocket Fuel, Quantcast, TripAdvisor and Scripps Networks, provided a strong foundation for campaigns while supplemental partners were tested and optimized across the varying seasons, including iExplore, WeatherBug, Adtegrity, AllTrails, Food + Wine and SOJERN. Publishers, such as Pandora, Boingo, YuMe and SpotXchange, were also rotated in the fall mix to push newly produced video content.

## **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-six partners were showcased in magazine insertions in:

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

## **Golf Marketing**

With more than 400 golf courses statewide, North Carolina is a leading destination for golf travel. With a goal of driving golf enthusiasts to VisitNC.com, a 2013 spring display campaign was implemented and consisted of two targeted players: Turner Digital, a top-performing network that provides relevant reach across PGA.com and Yahoo! Golf; and Wall Street Journal Digital Network, a test vehicle used to reach an incremental audience of business travelers with an affinity towards golf-related travel. In addition, partnerships with Pinehurst CVB and Rumbling Bald Resort greatly added to the program's overall reach and impact. The subscriber base for the monthly golf newsletter grew to roughly 21,000 and three golf-related sweepstakes generated a total of 24,175 entries.

## VisitNC.com

### Overview

As the state's official travel website, VisitNC.com hosted 4,532,007 user sessions, a 9.26 percent increase from 2012. VisitNC.com generated a total of 2,001,948 key performance indicator actions in 2013.

### Key 2013 VisitNC.com Performance Indicators

- 180,212 site visitors participating in **sweepstakes**
- 52,088 **Travel Guides** ordered from website
- 33,350 downloads of **virtual brochures**
- 47,860 downloads of **itineraries**
- 137,176 new subscriptions to **eNewsletters**
- 155,947 site **searches** performed
- 137,701 clicks to view online **travel publications**
- 1,029,303 clicks to **partner websites**

### Display (Banner) Advertising

54 participating partners  
193 display ads  
6,245,957 total impressions  
52,705 clicks to partner sites  
0.48 percent click-through rate

### Virtual Brochures

53 virtual brochures  
33,350 downloads

### Featured Event Listings

46 participating partners  
163 total featured events  
396,579 views of featured events  
56,802 clicks to partner sites

### Sweepstakes

17 participating partners/14 sweepstakes  
180,212 total entries (homepage and golf sweepstakes included)

Most Popular Homepage Sweepstakes:

1. Crystal Coast in March (22,154 entries)
2. Carolina Beach in June (17,525 entries)
3. Wrightsville Beach in April (17,235 entries)

Most Popular Golf Sweepstakes:

1. Rumbling Bald in May/June (22,154 entries)
2. Pinehurst Resort in March/April (9,373 entries)
3. Brunswick in July/August (9,313 entries)

**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

65,241 visits

119,174 page views

1.83 average number of page views per visit

1:03 minutes, average visit duration

Microsite complemented by 22,267 additional visits directly to VisitNC.com from U.K. travelers

DE.VisitNC.com

15,187 visits

35,567 page views

2.34 average number of page views per visit

2:06 minutes, average visit duration

Microsite complemented by 7,891 additional visits directly to VisitNC.com from German travelers

JP.VisitNC.com

13,342 visits

22,594 page views

1.69 average number of page views per visit

1:09 minutes, average visit duration

Microsite complemented by 4,504 additional visits directly to VisitNC.com from Japanese travelers

MX.VisitNC.com

21,179 visits

40,870 page views

1.93 average number of page views per visit

1:38 minutes, average visit duration

Microsite complemented by 2,334 additional visits directly to VisitNC.com from Mexican travelers

QC.VisitNC.com

14,070 visits

27,981 page views

1.99 average number of page views per visit

1:37 minutes, average visit duration

Microsite complemented by 51,687 additional visits directly to VisitNC.com from Canadian travelers



## **Search Engine Marketing**

### VisitNC.com

17,438,306 total impressions  
232,317 total clicks  
\$0.76 average cost-per-click  
\$3.68 average cost-per-KPI

### Media.VisitNC.com

33,615 visits in 2013  
1.60 average page views per visit  
1:16 average time spent on site

### SportsNC.com

16,634 visits in 2013  
1.46 average page views per visit  
0:39 average time spent on site

### NCFilm.com

103,539 visits in 2013  
2.81 average number of page views per visit  
2:07 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 nearly 16,000 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 2013, the Division 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 570,919,865 people nationally and more than a billion internationally.
- Hosted group media tours of the state for both German and U.K. travel writers.

Other Highlights:

### **New York Media Mission**

The Division hosted a very successful media reception in New York, NY on the evening of January 28. Teaming with 29 partners from across the state, the Division hosted 66 guests, 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. The Division 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 and was shared and promoted to media and consumers on YouTube and through the Southern Foodways Alliance Directors letter. Division 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, the Division, along with 16 partners from across the state, hosted a dinner for 12 journalists in Washington, D.C. The evening event included an overview of what was new in the state plus important updates from each of the partners. The partners and media participated in a progressive dinner in which the partners swapped tables (and journalists) during each of the courses, allowing the partners maximum face time while keeping the media guests engaged throughout the evening. Media outlets represented at the event included: *10 Best*, *American Food Roots*, *DC Modern Luxury*, *U.S. News & World Report* and *USA Today*.

## North Carolina Beer Month

The North Carolina Division of Tourism sought to capitalize on the popularity of craft beer as a tourism driver, creating North Carolina Beer Month in partnership with the North Carolina Craft Brewers Guild. The team selected April 2013 to implement the inaugural program to increase visitation during the spring shoulder travel season and to tie into existing beer festivals across the state:

- Successfully launched inaugural North Carolina Beer Month led by the North Carolina Division of Tourism with 20 DMO and more than 30 brewery partners.
- 602 media placements, including *Boston Globe*, *Conde Nast Traveler*, *New York Times* and *Philadelphia Inquirer* that generated 254,085,205 consumer media impressions and an advertising value of over \$2.3 million.
- 21,418 unique visitors to [www.ncbeermonth.com](http://www.ncbeermonth.com) from all 50 states and 77 countries.
- #NCBeerMonth was used 21,892 times in social media postings with 180 photos uploaded to Instagram.
- Total of 22,627 unlocked badges on Untappd resulting in more than 8,000 social posts reaching a potential of 2.5 million beer enthusiasts.
- Hotel occupancy increased 3.8 percent statewide in April 2013 from April 2012. This was 1.8 percent better year-over-year against competitive South Atlantic states.
- April 2013 ADR room rates increased by 3.8 percent, 1 percent better than competitive South Atlantic states.
- Room demand was up 5 percent statewide, twice the growth of competitive South Atlantic states.

## **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 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 and radio stations aired 38,342 spots representing a value of \$1,882,139.

### **North Carolina Press Foundation**

One hundred twelve papers published 1,165 ads representing a value of \$894,353.

### **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.

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 7,085,686 visitors in 2013. A breakout of the number of visitors by Welcome Center location is below:

<b>2013 Welcome Center Estimated Visitors</b>	
I-95 S	1,049,277
I-95 N	1,539,928
I-85 S	691,603
I-85 N	610,461
I-77 S	323,521
I-77 N	962,096
I-40 W	979,176
I-26 W	277,693
I-26 E	651,931
<b>Total:</b>	<b>7,085,686</b>

The I-95 North Welcome Center continues to be the most visited, hosting 1,539,928 travelers in 2013.

Welcome Centers registered nearly 10,000 visitors from other countries, including 5,657 from Canada.

In 2013, Welcome Centers booked about 16,000 room nights, representing total revenue of nearly \$1.4 million at an average rate of \$87.17 per room night.

## Inquiry/Call Center

In 2013, the Division of Tourism received 2.1 million inquiries and mailed 202,365 *NC Travel Guides* to potential visitors.

### 2012 Inquiries

Reader Service	67,901
1-800-VisitNC Calls	21,081
Web Inquiries	2,001,948
<b>Total</b>	<b>2,090,930</b>

## **Publications**

### ***The Official 2013 North Carolina Travel Guide***

The result of work throughout 2012, the Division worked with Journal Communications to produce the *Official 2013 North Carolina Travel Guide* to serve as the Division's primary fulfillment piece for potential visitors to and within the state. A new 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. Completely advertiser supported, the *Travel Guide* was produced at no cost to North Carolina's taxpayers with support in excess of \$1.1 million from 120 partners.

Two covers were created for the guide, which included more than 840 attractions, nearly 3,945 accommodations and travel resources in every county. One cover photo featured mountain kayaking in recognition of the Nantahala Gorge as the site of the 2013 International Canoe Federation's World Freestyle Kayaking Championships, and the other showcased Asheville's grand Grove Park Inn, celebrating its 100th anniversary.

The digital edition, available for Android and iOS, toggled between these two stunning images. The 174-page *Travel Guide* was 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 outdoor recreation, food, music, resorts and the Civil War. The pages were modeled after upscale consumer catalogs such as *Williams-Sonoma*, *Pottery Barn* and *Restoration Hardware* to appeal to North Carolina visitors. 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, this electronic publication is designed to provide information to the tourism industry. The mailing list also included legislators, economic developers and media. In 2013, *NewsLink* covered 1,119 stories within the 51 weekly and two "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 2013, 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 2013 Marketplace, the Division:

- Teamed with Visit Charlotte and other NC partners to host the Marketplace final night's event for all delegates.
- Teamed with 25 in-state partners to host 68 tour operators for dinner.
- Conducted 45 appointments with tour operators during the week, promoting group travel throughout the state.

### **Travel South Showcase, February 2013, 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. The Division utilized showcase opportunities to:

- Team with 20 travel industry partners and conducted 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: 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 three days with group in Cherokee, Asheville and the High Country.

### **Sales Mission**

Fifteen partners participated in sales calls to Virginia and Maryland, visiting tour operators and AAA Auto Club offices. Traveled via executive motorcoach, inviting clients on to the coach to meet with partners in more authentic, personalized atmosphere, calling it "Office on Wheels."

## International Marketing

### International Web Traffic

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

<b>2013</b>	<b>U.K.</b>	<b>Germany</b>	<b>Japan</b>	<b>Quebec</b>	<b>Mexico</b>
<b>January</b>	2,663	1,272	313	5,234	198
<b>February</b>	1,984	738	611	5,203	206
<b>March</b>	2,302	746	368	6,357	217
<b>April</b>	2,260	744	225	5,679	245
<b>May</b>	2,068	801	309	5,011	256
<b>June</b>	1,853	728	408	5,228	235
<b>July</b>	2,897	533	538	4,551	199
<b>August</b>	1,434	548	403	3,647	167
<b>September</b>	1,272	495	444	3,044	154
<b>October</b>	1,339	484	396	3,009	190
<b>November</b>	1,084	394	261	2,536	143
<b>December</b>	1,111	408	228	2,188	124
<b>Total</b>	22,267	7,891	4,504	51,687	2,334

UK: [www.uk.visitnc.com](http://www.uk.visitnc.com)  
Germany: [www.de.visitnc.com](http://www.de.visitnc.com)  
Japan: [www.jp.visitnc.com](http://www.jp.visitnc.com)  
Quebec: [www.qc.visitnc.com](http://www.qc.visitnc.com)  
Mexico: [www.mx.visitnc.com](http://www.mx.visitnc.com)



## **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 2013, overnight visitation from Canada was 516,073. The majority of overnight visitors came from the province of Ontario followed by those from Quebec.

Canadian visitors spent more than \$127 million in 2013, with overnight visitors spending 95 percent of the total spending.

### **Canadian Sales & Marketing Accomplishments**

- Continued the cooperative marketing plan with Total Vacations, Alio and Merit Golf that feature areas across the state.
- Exhibited at OMCA, held in Toronto, and U.S. Travel's IPW in Las Vegas.

### **Cooperative Marketing & Advertising Opportunities**

CAA: Hosted a series of webinars to drive visitors to the state targeting all three regions.

National Post Consumer Campaign: Six-week consumer contest that included print, digital and social media. The campaign provided a large reach throughout Canada. National Post readers are professional, educated and affluent, occupying top positions in business.

- The total investment was \$10,000 from North Carolina Division of Tourism; Total value from National Post was \$112,104. National Post added an additional 45,000 worth of media value to the campaign.
- Confirmed: Two round trip tickets and Maple Leaf Lounge passes from Air Canada
- Grand Prize:  
Round trip airfare for two – courtesy of Air Canada  
Bed & Breakfast stay at the Inn on Biltmore Estates  
The Ballantyne Hotel, two night stay with breakfast and one round of golf or spa treatment – estimated retail value \$6000
- The contest ended with 35,911 entries.

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

OBX Fam: Hosted four tour operators and Air Canada rep to the Outer Banks region of the state.

### **Sales Missions**

Sales missions were held in two cities (Toronto and Montreal) in February. Inviting industry partners to the event allowed them to participate in trainings during the day and to meet one-on-one with operators to discuss the product and build relationships. Both events were a success, including a reception with Canadian media that allowed for additional coverage to the state. The event was themed around barbecue and Southern hospitality, and between both cities, there were 28 trade attendees.

### **Canadian Public Relations Results**

- Six journalists visited the state
- Coverage generated included 19.7 million circulation resulting in value of \$490,016

## Overseas Visitors

In 2013, North Carolina attracted more than 1.2 million international visitors who spent an estimated \$437 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 Total Spend)**

Rank	Country of Origin	2013 Estimated Visitors	% change from 2012	2013 Total Spent	% change from 2012	Average Spending per Visitor
1	Canada	516,073	-6.8%	\$126,985,224	-5.3%	\$246
2	United Kingdom	86,662	-0.6%	\$32,565,004	-6.5%	\$376
3	China/Hong Kong	38,014	+14.1%	\$28,187,957	+7.4%	\$742
4	Germany	80,261	+8.7%	\$25,263,782	+4.2%	\$315
5	Japan	28,150	-5.9%	\$14,859,243	-16.9%	\$528
6	Mexico	34,132	+6.2%	\$13,206,609	0.0%	\$387
7	India	32,941	+11.3%	\$12,793,895	+1.2%	\$388
8	Brazil	24,262	+28.0%	\$10,686,986	+5.4%	\$440
9	France	26,350	-7.0%	\$9,531,840	-2.8%	\$362
10	Italy	14,196	+1.8%	\$6,352,181	+5.6%	\$447
	<b>TOTAL</b>	<b>1,212,941</b>	<b>-1.5%</b>	<b>\$437,331,913</b>	<b>-2.4%</b>	<b>\$361</b>

\* Spending only includes what is spent in North Carolina.

\*\* North Carolina Division of Tourism estimates based on extrapolations from government data and aggregate Visa usage data provided by VisaVue Travel for the period of calendar year 2013.

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 2013.

### **Overseas <sup>(1)</sup> Visitors To Select U.S. States and Territories: 2012-2013**

2013 Rank	Destination (State/Territory)	2013 Market Share
1	New York	30.6
2	Florida	22.5
3	California	20.2
4	Hawaiian Islands	9.9
5	Nevada	9.1
6	Texas	4.9
7	Guam	4.6
8	Illinois	4.5
9	Massachusetts	4.3
10	Pennsylvania	3.1
11	New Jersey	2.9
12	Arizona	2.6
13	Georgia	2.2
14	Washington	1.6
15	Utah	1.5
<b>16</b>	<b>North Carolina</b>	<b>1.2</b>
16	Colorado	1.2
18	Ohio	1.1
18	Virginia	1.1
18	Louisiana	1.1

(1) Excludes visitation from Canada and Mexico

Source: U.S. Department of Commerce, ITA, National Travel and Tourism Office, June 2013

## **U.K. and Ireland**

### **Sales & Marketing Accomplishments**

#### **Funway Vacations**

Tour operator, Funway, launched a Discover the South brochure and marketing campaign in 2013. North Carolina has four dedicated pages along with additional images. The new brochure and product launch was supported from January to March with several activities during that peak buying period. Those included:

- Trade marketing campaign via Travel Weekly
- Trade window poster campaign across 1000 key travel agents
- Funway web banner
- Funway landing page
- Dedicated social media coverage including Facebook, Twitter, Blogger and You Tube
- PR Activity

### **Sales Mission (Sept 2013)**

A sales mission took place covering London and surrounding areas with Georgia and South Carolina. The idea was to train tour operators as many of the three-state itineraries flow. Several trainings and key operators events were held as well as a media event with 18 national and trade publications attending.

#### **U.K. Public Relations Results:**

- Hosted several individual journalists in 2013
- Distributed six news releases
- Hosted an American Airlines fam tour of journalists to the area
- Total circulation of 20,750,213 valued at \$6 million

### **Special Project – Charley Boorman**

Extreme adventure U.K. television host, Charley Boorman, visited NC in the summer of 2013 to film segments for his show, The Charley Boorman Extreme USA. It was broadcast in November and December.

North Carolina featured Charley diving on a WW1 German U-boat and traditional North Carolina cooking. In Beaufort, the team visits one of the last wild horse colonies and rappelling 200 feet at Bradley Falls (Saluda, NC).

Charley is also shown immersing himself in American history, arriving in Charlotte on July 4th to visit battle re-enactors Jim and Tom at the Charlotte Museum.

Estimated viewership: **100,000,000** viewers (globally).

## **U.K. Media Tour**

A group of journalists from the United Kingdom toured North Carolina's "*Hunger Games* experience" in September, hosted by the Division and several partners. The writers represented British publications including *The People*, *Candis* magazine, the *Eastern Daily Press*, *Norwich Evening News*, *Let's Talk* and *First News*. The group visited notable locations beginning in Hildebran, the site of "District 12," and ending in Charlotte, the site of "Panem." The tour featured a number of businesses that became favorites of the film's cast, including the Hotel Indigo and Lexington Avenue Brewery in Asheville; Rocky's Grill & Soda Shop in Brevard; Pleasant City Wood Fired Grille in Shelby; and Amelie's French bakery in Charlotte. The group also had a guided tour of DuPont State Forest, Chimney Rock at Chimney Rock State Park and the U.S. National Whitewater Center in Charlotte. Industry partners that helped to host the writers included the Asheville CVB, Burke County TDA, Rutherford County TDA, Transylvania County TDA, Uptown Shelby and Visit Charlotte.

## **German-Speaking Europe**

- No. 2 overseas market with 88,406 visitors.
- These visitors spent \$29.9 million.
- Supporting two daily non-stop flights to the state.

## **Sales & Marketing Accomplishments**

### **Travelzoo**

In cooperation with Brand USA, North Carolina was featured as a destination of the week in Germany. The campaign reached over 1.54 million subscribers with a customized microsite on Travelzoo providing subscribers with a destination's selling points alongside compelling seven travel deals. The call to action featured a tour operator partner.

#### Results:

Page views	11,475
Clicks on deals	2,545
Clicks on editorial	1,320
Avg time on page	1.24 minutes

### **CANUSA Mapsite**

In the third year of our partnership with tour operator CANUSA, we showcased NC with a MapSite, an online marketing tool to attract the attention of repeat customers and new travelers to our state. It offers a platform for travelers and potential customers to explore the destination in an educating and entertaining way.

Visitors explored the state by scrolling over an area and visualizing activities from that region.

Since beginning our marketing partnership with CANUSA, we have seen a double digit increase in bookings.

### **Facebook**

The Division has a German Facebook page that highlights attractions, adventures and Project 543 and has a following of nearly 500 in 2013.

**German Public Relations Results:**

- Hosted seven journalists on visits to North Carolina
- Distributed 12 press releases to 685 media outlets
- Total coverage included a circulation of 96 million valued at \$6.9 million

**Other International News**

- New non-stop flights from US Airways Charlotte hub:
  - Seasonal flight service to Dublin was reinstated for 2013 and beyond
  - Seasonal flights added to Brussels, Lisbon and Barcelona and Manchester
  - Existing US Airways flight to London is now flying into Heathrow airport
- The Division hosted a double North Carolina booth at the U.S. Travel Association's IPW in Las Vegas. Industry partners from Charlotte and the Outer Banks joined the state with more than 40 trade and media appointments.
- The Division and its partners took part in Travel South International Showcase in Nashville from Dec. 2-4 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.
- Through a partnership with Travel South USA, North Carolina was featured Destination of the Month with Visit USA France in April.

## **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.

The Division is actively involved in ongoing programming either independently or in conjunction with partners such as the NC Rural Center, Commerce's Division of Community Assistance, Department of Cultural Resources and Handmade in America to foster revitalization that will make the communities more attractive to residents and visitors.

- The Division 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 tourism development.
- 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 ways to work with the Division to partners throughout NC.
- Represented the Division during the African American Heritage Commission planning meetings.

### **Tourism Resource Assistance Center (TRAC)**

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

TRAC sessions to date:

1. New Bern – over 40 partners attended
2. Lexington – over 25 partners attended
3. Smithfield – over 35 partners attended
4. Bryson City – over 40 partners attended
5. Morganton – over 60 partners attended
6. Jacksonville – over 50 partners attended
7. Edenton – over 30 partners attended
8. Greensboro – over 50 partners attended
9. Outer Banks "Mini TRAC" – over 25 partners attended
10. Fayetteville – over 50 partners attended

## **Community Partnerships and Heritage Development**

The Division also 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. The partnership includes 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 the Division to assist in coordinating planning for the 25 counties in the designated region. The Division 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, the Division 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)

The Division 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 will be distributed in the 2014 spring issue of *Food Traveler Magazine*.

### North Carolina Civil War Trails; Civil War 150<sup>th</sup> Commemoration

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 239 sites in 78 counties at the end of 2013 with a goal to install more in the future.

- Visitors downloaded 255 Civil War Trails maps from [www.VisitNC.com](http://www.VisitNC.com) through July 2013, and the map was also available via [www.civilwartraveler.com](http://www.civilwartraveler.com). An updated Civil War Trails map has been printed and is available online and in all NC Welcome Centers.
- Planning continued on marketing activities surrounding the 150<sup>th</sup> Commemoration of the Civil War (2011-2015).
- Work with the NC Civil War Tourism Council and inform 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 and other communities in the region.
- Contact 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.
- Contact with Textile Heritage Corridor group to preserve and promote Textile Mill Heritage areas.

- Contact with Daniel Boone Heritage Trail Committee on possible resources and marketing opportunities.
- Contact with African American Heritage Commission in the development of “Freedom Roads” Heritage Trail. Tourism Development Manager also 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 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, the Division of Tourism, Film & Sports Development will help market and promote the community.

- Division works with the Community Assistance office to administer and review applications.
- Tourism Development Manager continues to make presentations to local Commissions and City Managers on the guidelines, requirements and benefits of the program.
- Promotion of certified communities and areas of NC during the AARP and Ideal Living Regional Expos in Las Vegas, Atlanta and Washington, D.C.
- Tourism Development Manager attends conferences on trends, research and developing retirement communities, and serves on the Board of Directors for the American Association of Retirement Communities (AARC).
- Certified communities:
  1. Lumberton (pilot program)
  2. Asheboro
  3. Marion
  4. Sanford
  5. Pittsboro
  6. Mt. Airy
  7. Eden



## **Industry Relations**

### **Governor's Conference on Tourism in Wilmington (March 10-12)**

Secretary Sharon Decker spoke to more than 500 attendees during the conference at the Wilmington Convention Center. The Division's annual conference featured dynamic, educational programming and valuable networking opportunities and drew a near-record crowd focused on the theme of "Lights! Camera! Tourism!" In addition to her speech, Decker presented the 2013 Winner's Circle Awards to three distinguished North Carolinians for their contributions to the growth and success of the tourism industry in the state.

### **Tourism Week in Raleigh (May 4-12)**

Gov. McCrory proclaimed May 4-12 as North Carolina Tourism Week, marking the travel industry's record impact on the North Carolina economy with more than \$19 billion in direct visitor spending. For the second year in a row, state tax receipts as a result of visitor spending topped \$1 billion. The 2012 numbers were an increase of 5.4 percent from the previous year and well ahead of the national rate of 4.4 percent.

The Division 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 day 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 2012)**

The Division 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 the Division's planning efforts. MYMU brings together leaders from all sectors of North Carolina's travel industry to highlight recent performance trends, provide updates on the Division's current marketing programs and co-op initiatives, and gain insight from partners to help fuel the Division's strategic planning for FY 2014-15. Events were held within all three regions of the state including Asheville, Wilmington, Duck and Southern Pines throughout the month of September.

## **Sports Development**

The Division 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 36-member destinations and organizations. As a presenting sponsor, SportsNC coordinated and led a cooperative effort with 34 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 North Carolina Sports Association quarterly meetings, giving updates on Division activities.

## North Carolina Film Office (NCFO)

The state Film Office and regional film commissions promoted filmmaking in North Carolina at the annual Association of Film Commissioners International (AFCI) Locations tradeshow. The NCFO also participated in the Producers Guild of America (PGA) Produced By Conference and Location Managers Guild of America conference in Los Angeles as well as the annual Sundance Film Festival in Park City, Utah. The NCFO also hosted a special event in Los Angeles in February and made two additional recruiting trips to California. Locally, the state film office 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 continuing to promote the more than 25 film festivals held across the state.

### 2013 Production Highlights:

- 300 new projects
- 62 projects shot in North Carolina and registered with the NCFO
- \$256,081,507 direct spend by productions
- 5,763 production days (all-time high)
- 25,327 jobs created
  - 4,022 crew
  - 1,146 talent
  - 20,275 extras

### Highlights of film projects during 2012 include:

- *Under The Dome (Season 1)* – Wilmington Region
- *Homeland (Season 3)* – Charlotte Region
- *Sleepy Hollow (Season 1)* – Wilmington Region
- *Banshee (Season 2)* – Charlotte Region
- *Tammy* – Wilmington Region
- *Grass Stains* – Research Triangle Region
- *The World Made Straight* – Western Region
- *A Chef's Life (Season 1)* – Eastern Region
- *Tusk* – Charlotte Region
- *The Perfect Summer* – Wilmington Region
- *The Ultimate Life* – Piedmont Triad Region
- *The Remaining* – Wilmington Region
- *Honeymoon* – Western Region
- *The Squeeze* – Wilmington Region
- *National commercials for Fiat, Pepsi, Audi, Craftsman, Planters, and BP*