

2021 Annual Report

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

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

Table of Contents

NC Travel and Tourism Board	3
EDPNC Introduction	5
2021: The Year in Review	5
2021 Results	6
Visit North Carolina Budget Overview	7
NC Visitor Services Budget Overview	8
State Tourism Office Budgets	9
Marketing Program Highlights	10
VisitNC.com	11
Post-COVID-19 Campaign	13
Public Relations	16
Visitor Services	17
Publications	18
Domestic Marketing	19
International Marketing	20
Tourism Development	24
Industry Relations	27
North Carolina Film Office	28

2021 NC Travel and Tourism Board

Listed here is the Board for the year 2021 as required for the Annual Report. For information on the current board, please go to <https://partners.visitnc.com/travel-tourism-board-1>.

Kimberly Albritton

Great Smoky Mountain Railroad
Appointed By: Speaker of the House

Jim Beley

The Umstead Hotel
Appointed by: NCRLA

Rolf Blizzard, Chair

Turnpike Properties
Appointed By: NC Travel & Tourism Coalition

Mike Butts

Visit Charlotte
Appointed By: DMANC

Christopher Chung

Economic Development Partnership of NC
Appointed By: Economic Development Partnership of NC

Secretary Machele Sanders

NC Department of Commerce
Appointed By: NC Department of Commerce

Bobby Hanig

North Carolina House of Representatives
Appointed By: Speaker of the House

Sen. Chuck Edwards

North Carolina Senate
Appointed By: Senate President Pro Tempore

Jonathan Fussell

Duplin Winery
Appointed By: Senate President Pro Tempore

Rep. Ray Pickett

North Carolina House of Representatives
Appointed By: Speaker of the House

Lynn Minges

NC Restaurant & Lodging Association
Appointed By: NCRLA - Lodging

Sen. Bob Steinburg
North Carolina Senate
Appointed By: Senate President Pro Tempore

Lee Nettles
Outer Banks Visitors Bureau
Appointed By: EDPNC

Steve Pasquantonio
Blue Mainsail Inc.
Appointed By: Governor

Tamara Daniels
Charlotte Hornets
Appointed By: Governor

Sharon Sexton
Caswell County Chamber of Commerce Retired
Appointed By: Senate President Pro Tempore

Jim Beley – appointed August 2019
The Umstead Hotel & Spa
Appointed By: NCRLA - Restaurant

Dennis Edwards
Greater Raleigh CVB
Appointed By: NC T&T Coalition

Vivek Tandon
Tandon IV, LLC
Appointed By: Speaker of the House

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

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

2021: The Year in Review

The North Carolina tourism industry saw a major recovery in 2021 with \$28.9 billion in visitor spending. With domestic travel reaching new heights as international visitation lagged, the total falls just 1 percent below the record set in 2019 and represents a 45 percent increase from pandemic-stricken 2020. Recovery in visitor spending was felt statewide with all 100 counties seeing increases. The state's tourism-supported workforce increased 10.5 percent to 197,500 jobs in 2021. That figure reverses the more than 26 percent loss in employment suffered in 2020. But the total remains 18 percent below the record 242,600 jobs from 2019. Tourism payroll increased 19 percent to \$7.7 billion. Also, as a result of visitor spending, state and local governments saw rebounds in tax revenues to \$2.3 billion.

Source: Tourism Economics

Partnerships with destinations, attractions, lodging and dining properties and associations statewide remain key to North Carolina's success. For a second year in a row, North Carolina was the fifth most visited state in the nation for domestic visitation.

Source: OmniTrak TravelTrakAmerica

Program Highlights for 2021

Direct employment generated by travelers in North Carolina increased 10.5 percent in 2021 to nearly 197,500 jobs. Employment as a result of tourism still lags behind the record of 242,600 set in 2019.

Source: Tourism Economics

On an average day in 2021, visitors in North Carolina spent more than \$79 million and contributed more than \$6.4 million in state and local taxes.

Source: Tourism Economics

Visit NC was an early adopter of Arrivalist, a location-based attribution tool that tracks digital advertising exposures and then corresponding arrivals to the state. Visit NC's owned digital and paid digital media in 2021 generated an 84 percent Arrival Lift. This means those who saw Visit NC's owned and paid digital media have an 84 percent higher arrival rate to the state than a similar audience who didn't see our digital media but came on their own.

2021 Results

Visitor Spending

In 2021, it is estimated that visitors to North Carolina spent \$28.92 billion in the state, an increase of 44.9 percent from 2020. Visitor spending directly supported 197,500 jobs for North Carolina residents and the tourism industry directly contributed \$7.7 billion to the state's payroll in 2021.

Traveler spending generated \$3.9 billion in federal, state and local tax receipts, an increase of 29.0 percent from 2020.

Source: Tourism Economics

2021 Travel Volume

North Carolina person-trip volume was 44.4 million in 2021, ranking North Carolina No. 5 in total domestic person-trip volume.

Source: Omnitrak

2021 Total State Rankings by Volume

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

Source: Omnitrak

Average Trip Spending

North Carolina overnight visitor parties spent approximately \$749 per trip in 2021. Out-of-state visitors spent approximately \$874 per trip in 2021, while in-state resident travel parties spent \$515 per trip on average. This represents a 52 percent difference in average per trip spending among resident visitors traveling within the state and out-of-state visitor parties.

U.S. overnight travel parties on average spent \$861 per trip in 2021.

Source: Omnitrak

Average Overnight Trip Duration

The average length of stay of North Carolina visitors was 3.7 nights in 2021. Resident visitors stayed an average of 2.8 nights, while out-of-state visitors stayed an average of 4.1 nights.

U.S. travelers stayed an average of 3.5 nights per trip in 2021.

Source: Omnitrak

North Carolina's Top States of Origin for Overnight Visitors

- NC 35%
- VA 10%
- SC 10%
- FL 6%
- GA 5%
- PA 4%
- NY 4%
- TN 3%
- OH 3%
- TX 3%

Source: Omnitrak

NC's Activities for Overnight Visitors

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

While visiting friends and relatives and shopping are routinely mentioned every year among all travelers, outdoor activities such as the beach, rural sightseeing, hiking and visiting historic areas were among the most popular specific activities surveyed. After the pandemic year that kept many distanced, the state saw a resurgence of visitors who participated in fine dining, local arts/crafts, craft breweries, urban sightseeing and museums more in 2021 than 2020.

Source: Omnitrak

Visit North Carolina Budget Overview

Marketing Media Purchase & Production	\$6,685,580
Personnel & Administration	\$1,439,348
Rent, Facilities and Computers (tech and licensing)	\$323,369
VisitNC.com Dev. & Maintenance (Interactive)	\$389,200
International Marketing (Canada, Germany, UK)	\$950,624
Film Office Marketing	\$431,660
Public Relations	\$389,040
Domestic Sales Promotion (Group and Sports)	\$129,552
RetireNC and Industry Relations	\$113,394
Research	\$569,716
TOTAL	\$11,421,483

North Carolina Visitor Services Budget Overview

Funded by appropriations from the General Assembly, the Visitor Services section is a part of the North Carolina Department of Commerce. Visitor Services, comprised of the State's nine Welcome Centers, the Tourism Call Center and the Tourism Warehouse, is staffed by about 48 FTEs annually. The Call Center operates in partnership with Visit NC, and the NC Departments of Public Safety and Transportation.

Appropriations included:

Welcome Centers	\$2,319,128
Inquiry/Fulfillment	429,812
<hr/>	
Total	\$2,748,940

State Tourism Office Budgets: 2021-22

North Carolina's budget of approximately \$11.4 million ranked among the lowest among southern state tourism office budgets in 2021-22, significantly behind several states that are direct competitors. North Carolina's core tourism promotion budget remained flat for the fourth year.

State	Projected 2021-22 Budget	Number of FTE staff
Virginia	28,500,000	59
Tennessee	27,900,000	35
Louisiana	26,400,000	25
West Virginia	25,500,000	20
Arkansas	22,100,000	20
Alabama	22,000,000	27
Missouri	19,700,000	17
Mississippi	15,000,000	18
Kentucky	14,100,000	17
South Carolina	13,200,000	15
North Carolina	11,400,000	12
Georgia	10,000,000	20

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

Marketing Program Highlights for 2021

Visit NC was an early adopter of Arrivalist, a location-based attribution tool that tracks digital advertising exposures and then corresponding arrivals to the state. Visit NC's owned digital and paid digital media in 2021 generated an 84% Arrival Lift. This means those who saw Visit NC's owned and paid digital media had an 84% higher arrival rate to the state than a similar audience who didn't see our digital media but came on their own.

Brand Advertising Campaign

North Carolina's travel industry was not immune to the devastating impact of the COVID-19 pandemic. Historically the nation's sixth most visited state, visitor spending fell 37 percent in 2020. In spring 2020 Visit NC had quickly shifted from inspiring and attracting potential visitors to a public safety initiative designed to increase resident and traveler confidence in engaging in dining, hospitality, and travel activities. Count On Me NC was launched in collaboration with the NC Department of Health and Human Services, the NC Restaurant and Lodging Association, NC State Extension and travel industry partners to change consumer behavior and reinforce recommended safety protocols.

As positive momentum and progress was made against the virus, Visit NC was concurrently planning the next phase of recovery for North Carolina's economy. With restrictions eased and vaccination rates increasing, Visit NC returned to more active travel promotion in Spring 2021 with a new multi-channel brand campaign, "Get Back to a Better Place." The campaign's focus was on those reemerging travelers and outdoor enthusiasts in market for and willing to travel during the pandemic.

Research was key in crafting inspiring messaging and delivering it when the audience was more receptive. The new campaign launched as winter 2021 faded and sentiment tracking signaled travelers were open to seeing inspiring travel messaging, in a planning state of mind and looking forward to summer travel.

North Carolina enjoys strong repeat visitation, and Visit NC was confident the suggestion of "getting back to a better place" would resonate with travelers yearning for respite from the isolation felt so strongly during the pandemic. People were anxious to reemerge from their homes and return to those familiar places and experiences that would refresh and rejuvenate both mentally and physically, and rekindle important connections with loved ones. Those places, those experiences, were all to be found in North Carolina.

The multi-channel, digitally focused effort reached proven Eastern Seaboard and near Midwest markets and leveraged owned, earned, and paid media including OTT/CTV, video, paid social, paid search, display, and select print while continuing to incorporate affordable and effective co-op opportunities for Visit NC's travel industry partners.

Campaign performance was optimized regularly, and its impact measured most notably through Arrivalist and an Advertising Effectiveness/ROI study.

"Get Back to a Better Place" raised awareness, drove visitation, and made a significant, meaningful difference in the recovery of North Carolina's travel economy in 2021 as evidenced in the campaign's performance and impact.

Third party Advertising Effectiveness/ROI research conducted by SMARInsights reported:

- 44% consumer awareness for the campaign
- Cost per aware household of 26 cents was below the benchmark of 29 cents
- Advertising generated a 9-point lift in positive ratings and 12-point lift in likelihood to visit
- Campaign excelled at communicating its specific goals, with each objective ranking in the top 10 percent for comparable studies performed by SMARInsights
- Creative communicated the state's natural beauty and its appeal as a place for disconnecting from the stresses of everyday life, important criteria to the target audience
- "Get Back to a Better Place" also received "excellent ratings for showing experiences of interest to consumers and for generating interest in learning more about North Carolina, signaling the creative message is connecting with consumers' emotional reasons for travel"
- North Carolina was second only to Florida in overall awareness ratings among its competitive set

Most importantly, SMARInsights reported a remarkable return on investment for the campaign including having:

- Sparked 1,090,676 trips and \$1.4 billion in incremental visitor spending
- Generated \$354 in visitor spending per dollar of media investment
- ROI of \$32:1 in state and local taxes generated per dollar of media investment

Additional performance measures for representative tactics that helped drive the strong awareness and interest included:

- YouTube = 82% Video Completion Rate (VCR), 29% higher than platform benchmark
- OTT/CTV = 97% Video Completion Rate (VCR), 11% higher than vendor benchmark
- Display = 1.57% Click Through Rate (CTR), 33% higher than vendor benchmark

And, finally, North Carolina strengthened its market share position, now ranking as the nation's fifth most visited state for domestic visitation.

Outdoor NC

Interest in the outdoors reached new heights during the pandemic and elevated the importance of preserving North Carolina's natural environments to ensure the use and enjoyment of the state's much desired recreational resources for future generations. Visit NC launched Outdoor NC in collaboration with the **NC Outdoor Recreation Industry Office** and **Leave No Trace Center for Outdoor Ethics** to educate visitors and residents on appropriate behavior and care for our outdoor spaces. Initial efforts included both consumer and partner facing assets and emphasize core Leave No Trace principles tailored specifically to North Carolina. A toolkit for statewide partners was created featuring posters, ads, social templates and more. Outdoor NC will remain an integral component of Visit NC's program of work as sustainability is a core value and priority for the organization. Plans include further outreach and coordination with state agencies, industry partners and private sector allies.

VisitNC.com

Overview

As the state's official travel website, VisitNC.com represents thousands of NC industry partners to millions of avid travelers seeking information to make the most of their leisure travel. With the impact of the COVID-19 pandemic lingering and influencing travel planning for many, VisitNC.com continued to be a valuable resource for consumers seeking inspiring information on destinations and attractions welcoming visitors while also emphasizing proper protocols for visiting safely.

VisitNC.com 2021 Key Performance Indicators

10,417,941 site page views
4,363 site visitors participating in sweepstakes
26,825 Travel Guides ordered from website
23,591 downloads or views of virtual brochures
2,832,806 views of story pages
14,858 new subscriptions to e-newsletters
337,999 site searches performed
852 clicks to view online travel publications
1,569,225 clicks to partner websites
39,081 clicks to view travel deals
7,457 on-site video views
29,654 mobile phone calls

Virtual Brochures

80 virtual brochures on the site
23,591 downloads or views

Featured Event Listings

16 participating partners
59 total featured events
77,029 views of featured events
20,133 clicks to partner sites

Sweepstakes

3 sweepstakes
4,363 total entries

Most Popular Sweepstakes

Outdoor NC Pledge Sweepstakes (2,085 entries)
Outdoor NC Pledge Sweepstakes - p2 (1,339 entries)
Outdoor NC Pledge Sweepstakes - p3 (939 entries)

Family of Sites

Media.VisitNC.com

10,106 sessions
2.6 average page views per session
2:26 average session duration

RetireNC.com

22,981 sessions
1.4 average page views per session
1:05 average session duration

SportsNC.com

9,429 sessions
1.27 average page views per session
0:26 average session duration

NCFilm.com

55,471 sessions
2.09 page views per session
1:25 average session duration

Database and Web Management

Working in collaboration with hundreds of partners statewide, the team provided timely maintenance and technical support for VisitNC.com's extranet database of more than 10,091 lodging, attraction, activity, event and dining listings reaching all 100 counties.

During the year, the team created and distributed a consistent program of e-newsletters, advisories and informational mailings to local tourism offices across the state.

Additional Campaign Highlights

Drive-Thru Vacations

During the pandemic, like its peers across the country, Visit NC faced a difficult dilemma as to how and even when to return to actively promoting and inspiring travel. COVID-19 was a crisis for everyone, including destination marketing organizations across North Carolina with stay-at-home orders, closings, cancellations and catastrophic job losses among their travel and hospitality partners.

With COVID-19 still a concern for travelers in winter 2021, Visit NC created a platform for encouraging safe getaways and trips.

"Drive-Thru Vacations" was a mini, three-month campaign serving as a bridge from Visit NC's "Count On Me NC" public safety initiative to "Get Back to a Better Place," a broader travel inspiration recovery marketing effort launched in April 2021, when North Carolina's COVID restrictions and protocols were further relaxed.

The Visit NC team identified attractions and activities travelers would find inspiring and paired them with "shop local and safe" Count On Me NC-certified businesses for a meal or to pick up a souvenir. Those adventures ran the gamut from a 4x4 drive on the beach to viewing murals from your car or cruising "America's Favorite Drive," the Blue Ridge Parkway. Not your fancy? How about a waterfall byway, tallest lighthouse in North America, a two-acre park full of oversized whirligigs (North Carolina's official folk art), barn quilt trails or a drive-thru zoo. Still not enough, then check out the Metal Zoo of sculpted intricate masterpieces of fanciful animals. No matter your speed, there was a Drive-Thru Vacation for everyone.

Media relations spread the word with pickup from multiple news and lifestyle outlets. A mix of organic social posts, custom stickers for Instagram, email blasts to Visit NC's subscriber base, clever creative at North Carolina's nine Welcome Centers and an inviting messaging for those calling 1-800 VISIT NC extended the effort. And a custom landing page at visitnc.com/drive helped travelers plan their getaway offering a sweet and savory menu of scenic North Carolina road trips.

Travelers were also encouraged to visit CountOnMeNC.org where they would find more than 4,000 attractions, restaurants, accommodations, outfitters and retailers making a concerted effort to help keep everyone healthy, and tips on how to stay safe when visiting North Carolina.

In North Carolina, those experiencing cabin fever found it's easy to enjoy the journey as much as the destination when the two are the same.

This interim campaign generated nearly three million brand impressions and \$150,000 in earned media coverage with no paid support.

More importantly, "Drive-Thru Vacations" kept North Carolina tourism top of mind at a time when consumers felt cooped up – and the hospitality industry had all but given up hope.

(Note: In 2022, Visit NC and "Drive-Thru Vacations" received a National ADDY® Award from the American Advertising Federation and two Mercury Awards from the U.S. Travel Association and its National Council of Tourism Directors.)

Paid Social

Travel restrictions and spikes in COVID cases early in the year did impact tourism in 2021, but with vaccines rolling out to larger groups, people were ready to travel again. On social media, Visit NC tapped into high-intent travelers seeking trip inspiration via Facebook (various ad formats, from video to static link ads, to drive brand engagement and reach); Instagram (drive inspiration through visual storytelling via in-feed and real-time story units); and Pinterest (encourage discovery and future planning through promoted pins). Combined efforts accounted for more than 338 million impressions, 364,000 link clicks, 116,000 ad engagements (likes, shares, pins), and 14 million video views.

Organic Social

The Visit NC team's organic social efforts in 2021 also generated strong performance across multiple channels. Among the highlights:

- Visit NC yielded more than 13.9 million impressions and 555,700 organic engagements on content deployed across Instagram, Facebook, Twitter and Pinterest during 2021.
- All average organic engagement rates surpassed industry benchmarks for the year. (Pinterest industry benchmarks are unavailable)
 - Instagram: 4.54% (Travel Industry Benchmark: 1.41%)
 - Facebook: 0.77% (Travel Industry Benchmark: 0.27%)
 - Twitter: 0.40% (Travel Industry Benchmark: 0.04%)
- The top-reaching platform was Instagram with a combined 9.6 million impressions across in-feed posts and stories. Instagram also enjoyed the highest engagement rate.
- Pinterest saw a resurgence in relevancy. The platform yielded 2.3 million impressions (April - December), the second highest-yielding platform for the year.

Paid Search

Visit NC continues to prioritize paid search efforts as an always-on media lever to capitalize on paid search's ability to capture qualified user interest and intent, drive cost-efficient traffic to VisitNC.com content, and convert downstream clicks to partner sites. Google continued to serve as the primary work horse, leveraging mixed "capture demand" and "create demand" strategies to cater to travel prospects with North Carolina already in mind while also inspiring those not yet searching by destination. In total,

Google and Bing combined generated 8.1 million impressions, nearly 624,000 clicks, and over 150,000 downstream clicks.

Print

In 2021, the plan included titles and categorized bundles based on strategic alignment across both brand and co-op partner interest.

Atlanta Magazine
Blue Ridge Country
Carolina Country
Charlotte Magazine
Cleveland Magazine
Columbus Monthly
Garden & Gun
Jacksonville Magazine
Nashville Lifestyles
Orlando Magazine
Our State Magazine
Philadelphia Magazine
Pittsburgh Magazine
Richmond Magazine
South Carolina Living
Southern Living
Tennessee Magazine
Town
Washington Post Magazine

North Carolina Ski Areas Association

Visit NC and the North Carolina Ski Areas Association (NCSAA) continued working together to build awareness and intent to visit NCSAA member resorts for winter travel. The December 2020 – March 2021 cooperative marketing effort targeted NC, FL, GA, SC, and TN—in addition to a new national targeting approach in select campaigns—and drove site visits to GoSkiNC.com and downstream referrals to the resorts’ own websites. Continuing to strategically optimize and refine the media mix based on the prior year’s results, the focused campaign leveraged paid search and paid social to generate nearly 116,000 site sessions and more than 29,000 downstream clicks to NCSAA resort websites.

In-State Marketing Initiatives

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

North Carolina Association of Broadcasters

Member television and radio stations aired 13,038 spots representing a value of \$869,275.

North Carolina Press Foundation

60 member publications published more than 2,500 ads representing a value of \$1,065,000.

PBS North Carolina

PBS North Carolina's award-winning team airs 52 weekly episodes of its popular show *North Carolina Weekend*. In its nineteenth year, every episode of *North Carolina Weekend* is broadcast statewide multiple times each week on: PBS NC, The Explorer Channel and the North Carolina Channel. Visit NC's partnership with PBS North Carolina and *North Carolina Weekend* provided more than \$1.8 million in valuable exposure while featuring more than 200 destinations, attractions and events across the state.

Public Relations

Despite the ongoing pandemic, the Public Relations program began a return to its core media relations strategy of hosting editors, journalists and content creators on the ground in North Carolina for individual and group media visits. Over the course of the year, Visit NC hosted 21 domestic and international journalists who visited a mix of Tier 1, Tier 2 and Tier 3 counties.

For the second year in a row, the pandemic forced the suspension of out-of-state media missions, a key partner program that enables partners from local tourism offices to meet with travel writers and other content creators to generate interest in visitation and coverage. However, the PR team successfully hosted an in-state media mission in Raleigh with 34 local tourism office (DMO) partners participating and 35 media attending.

To meet the challenge of sustaining interest in future travel to North Carolina without outbound missions, the PR team heightened its focus on responding to reactive media leads. From these efforts, the team garnered 46 earned placements in national and international outlets.

The PR team's efforts led to print and digital coverage in such top-tier publications as The Wall Street Journal, "Good Morning America," Parade, USA Today, Forbes, Travel + Leisure, Food & Wine, Cuisine Noir, Essence and Fodors. Consumer impressions totaled two billion with coverage representing 42 counties, 30 of which were classified as Tier 1 or 2.

Visitor Services

North Carolina's nine Welcome Centers hosted **7,948,292** visitors in 2021. A breakout of the number of visitors by Welcome Center location is below:

2021 Welcome Center Estimated Visitors	
I-95 S	1,085,694
I-95 N	1,605,919
I-85 S	830,049
I-85 N	349,668
I-77 S	381,307
I-77 N	1,009,968
I-40 W	943,166
I-26 W	307,250
I-26 E	1,435,271
Total:	7,948,292

- The I-95N Welcome Center was the most visited in 2021, hosting 1,605,919 travelers.
- Welcome Centers registered 1,709 visitors from other countries, overwhelmingly from Canada.
- The I-85N Welcome Center in Norlina was closed April -June 2021 for a major Rest Area project and minor improvements to the Welcome Center exterior.
- All Welcome Centers have AED – Defibrillators . The Staff are CPR certified and trained on AED.
- All Welcome Centers have Panic Buttons to maintain safety and security as needed.

Publications

As a result of work throughout 2021, Visit NC contracted with Meredith Travel Marketing to produce the Official 2022 North Carolina Travel Guide published annually each year by mid-December 2021. The Official Travel Guide serves as Visit NC's primary fulfillment piece for potential visitors to and within the state. To frame the spectrum of travel options, the guide features a different cover for each of the state's three major regions. For the mountains, a shot of Oxbow River Snorkeling in Lake Toxaway captures a unique view of the French Broad River. Leah & Louise, a celebrated restaurant in Charlotte's creative Camp North End, draws focus to the culinary appeal found in Piedmont cities. The coastal cover depicts the pleasures of a family getaway at Villa Capriani in North Topsail Beach.

Building on the [Outdoor NC](#) initiative to promote sustainable enjoyment of natural spaces, the guide highlights such wonders of the wild as migrating sea turtles and tundra swans; steers travelers to Hanging Rock, Crowders Mountain and other state parks; and points the way to places for paddling and fishing. Special callouts throughout the guide invoke the seven Outdoor NC principles adapted from those of the Leave No Trace Center for Outdoor Ethics, an initiative partner.

The 108-page guide showcases more than 350 locations. A fold-out state map expedites navigation as travelers chart getaways to play golf, gaze at the night sky or indulge at a luxury resort. More than 130 images capture the state's diverse beauty.

The print edition is available at the state's nine [Welcome Centers](#) or by calling 800-847-4862 (800-VISITNC). Readers can also link to [VisitNC.com/travel-guides](https://www.visitnc.com/travel-guides) to request a copy, access the digital edition or download a PDF version. In addition to traditional distribution channels, additional steps were taken in 2022 to reach a surgical audience. Visit NC polybagged 100,000 of the 2022 Travel Guides in Midwest Living and Real Simple and distributed nearly 5,000 guidebooks directly to inbound travelers through Raleigh-Durham International Airport and Asheville Regional Airport.

The 108-page, 2022 Travel Guide was produced by Meredith Travel Marketing. It was financed by private industry support with \$782,394 in advertising. The self-mailer format for printed copies reinforces the green initiatives of Visit NC and the Economic Development Partnership of North Carolina.

NewsLink

Emailed weekly to nearly 4,800 subscribers, *NewsLink* is an electronic publication designed to provide information to the North Carolina tourism industry. The mailing list also includes legislators, economic developers and media. In 2021, *NewsLink* covered 516 stories within the 50 weekly and one "Special Edition" issues, providing timely information on tourism-related research, statewide and international trends, media leads, updates on conferences and events, and other items of interest to those in the tourism field.

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

Domestic Marketing

Southeast Tourism Society Domestic Discovery, February 23-24, 2021, Virtual

Traditionally this would be an in-person event, previously known as Travel South Domestic Showcase. This event was an online education, networking, itinerary development event for tour operators and suppliers with the Southeast Tourism Society. It was a two-day event. Each state had small group discussions with their state partners to educate group tour operators in a breakout room format. We had seven partners represented. Our schedule included meeting with 40 group tour planners. We also participated in the state-led history itinerary development session webinar for group tour operators with our neighbors - WV, DC, Virginia, and SC.

American Bus Association (ABA) Marketplace, May and June 2021, Virtual

ABA Marketplace is one of the premier industry events for the group travel industry, allowing travel buyers (tour operators) and sellers (destinations) to meet face-to-face in prescheduled appointments. Due to COVID-19 this in-person event went virtual. We participated in two virtual events. We took 21 appointments with tour operators in June and had 23 appointments in May.

Sports

TEAMS Conference, Sept. 27-30, 2021, Atlantic City, NJ

Travel, Events and Management in Sports (TEAMS) is the world's leading conference and expo for the sports-event industry. This year it was held September 27-30 in Atlantic City, NJ. TEAMS is one of the premier trade shows for sports planners to meet with destinations and sports organizations to conduct business as well as learn about industry trends and best practices related to sports. For more than 20 years, TEAMS has helped define the sports-event and appointment-based trade show industries.

We had 38 scheduled appointments under the branding of SportsNC where we join with local tourism offices across the state to market under one brand.

Cycle North Carolina, October 2021

Cycle NC's 22nd Annual Mountains to Coast ride rolled through North Carolina in October 2021. The 2021 event had 800 participants from 41 states, plus Washington, D.C., Canada, Costa Rica and the United Kingdom. Starting in Sparta, the ride had overnight stays in Mount Airy, Reidsville, Roxboro, Creedmoor/Butner, Smithfield, and Wallace, ending at North Topsail Beach. Along the routes were rest stops in Ennice, Mount Airy, Westfield, Sandy Ridge, Stoneville, Reidsville, Yanceyville, Leasburg, Oxford, Raleigh, Clayton, Smithfield, Goldsboro, Mount Olive, Turkey, Kenansville, Burgaw, Maple Hill, and Holly Ridge.

For the fifth year, Visit NC sponsored the Cycle NC/Visit NC Excursions. These daily excursions offered the opportunity to take a break from the ride and experience more of North Carolina. This expands the impact of Cycle NC to additional towns that are near but not along the route. Stops included visits to Wilkes/Allegheny County, Mount Airy, Winston-Salem, Greensboro, Burlington/Alamance, Hillsborough, Roxboro, Durham, Creedmoor/Butner, Raleigh, Goldsboro, North Topsail.

Esports Travel Summit, December 14-16, 2021, Pittsburgh, PA

Our office attended the EsportsTravel Summit, which is the world's largest gathering of esports tournament and video-game event organizers and the only event focused on the travel side of the esports industry.

Presented by SportsTravel and hosted by SportsPittsburgh the 2021 EsportsTravel Summit was held December 14-16, 2021 in Pittsburgh. Launched in conjunction with the TEAMS Conference & Expo in 2017, the EsportsTravel Summit was an immediate success because it helped fill an information vacuum that exist for organizers of video game events and those in the travel and tourism industry who want to understand and profit for the esports phenomenon.

We had 20 scheduled appointments with event organizers under the branding of SportsNC.

International Marketing

Canada

Market Highlights:

- Multiple daily non-stop flights to Charlotte Douglas and Raleigh-Durham airports returned in 2021.
- No. 1 international market with 48,540 visitors due to ease of access via highways and direct air service. The majority of overnight visitors came from the province of Ontario followed by those from Quebec.
- These visitors spent \$19 million.

Cooperative Marketing & Advertising Opportunities

Total Mom Show

Visit NC partnered with the Total Mom Inc. on their second annual Canada's Total Mom Show presented by **Scotiabank** Women Initiative, powered by **Visa Canada**. We sponsored a recognition award and trip giveaway in partnership with Explore Brevard.

Results:

North Carolina was **the only destination profiled**. We obtained **exclusivity and owned the market**, beating out all destinations including domestic, during a global pandemic; we were able to **achieve visibility among the more than 700 consumers and companies**. Pre-event coverage in Canada's top media outlets garnered more than **7,000,000 media impressions nationally**.

Virtual Media Event

- Promoting **'Exit to a Better Place'** campaign – event focus was to promote opportunities in the destination with highlights on each region, major highways for easy road trip access and new activities to experience.
- Participating partners – Brunswick County, Raleigh, Visit Winston-Salem, Johnston County, Outer Banks & Transylvania County Tourism
- **100% attendance with zero participant drop-off** during the 60-minute event, leading to five long leads

- Immediate coverage: Canadian Travel News (UVM 23,000) & Informed Traveller (120,000+ listeners)

Travelweek Canada

- Developed an integrated marketing campaign to promote Visit North Carolina to Canadian travel professionals for a late summer re-opening. We leveraged our dynamic multiple media channels and robust audience reach to create a dynamic campaign around Canada Day (July 1) via their main brand & their French-Canadian brand, *Profession Voyages*.
- Combined platforms **reached 72k travel agents and industry professionals monthly**.

Corus

- Prepared a long-lead multi-channel campaign with Corus Tempo media group to include radio, TV, sponsored content and advertising. Radio portion included a contest giveaway and live on-air mentions in June 2021. TV included three segments with Visit NC spokesperson and partners from Outer Banks VB and Brevard VB in Nov 2021 and integrated Globalnews.ca sponsored content and banner ads.
- Combined platforms reached more than **19 million viewers and readers monthly**.

Overseas Visitors

In 2021, North Carolina attracted 210,784 international visitors who spent an estimated \$286 million in the state. Canada, Mexico and the U.K. were the top countries of origin to the state in terms of visitor volume. Other top countries of origin were Germany, India, Brazil, France, Spain, Italy and China.

North Carolina's Top 10 International Markets by Market Share (Ranked by Visitors)

Rank	Country of Origin	2021 Estimated Visitors	Percent Change from 2020	2021 Estimated Spending	Percent Change from 2020	Average Spending per Visitor
1	Canada	48,540	-54%	\$19,909,103	-49%	\$ 410
2	Mexico	18,442	50%	\$ 6,552,480	62%	\$ 355
3	United Kingdom	10,796	-38%	\$12,820,865	-22%	\$1,188
4	Germany	10,372	-3%	\$10,936,022	39%	\$1,054
5	India	9,962	42%	\$18,355,824	57%	\$1,843
6	Brazil	3,549	-12%	\$ 8,187,144	19%	\$2,307
7	France	3,526	-23%	\$ 4,070,422	59%	\$1,154
8	Spain	3,397	34%	\$ 2,749,094	82%	\$ 809
9	Italy	2,413	35%	\$ 2,404,427	83%	\$ 996
10	China	2,076	-58%	\$13,756,593	-22%	\$6,627

*Tourism Economics, 2022

U.K. and Ireland

Market Highlights:

- The top overseas market to North Carolina with more than 10,000 visitors in 2021, spending \$12.8 million.
- The state is typically served directly with two daily non-stop flights to Heathrow – only the Charlotte flight returned in 2021.

National Geographic Traveller Activity

Theme:

A culinary theme with featured pre-recorded cooking demonstration by Raleigh restaurateur Cheetie Kumar. A panel discussion followed, and the conversation expanded to include BBQ, beer, wine, moonshine, history and the various regions of the state. Cheetie was the North Carolina Ambassador participating on the panel along with Margo Metzger.

Components:

- Virtual event hosted on Zoom along the lines of NGT Travel Geeks with an expert
- panel of 3-4 moderated by the NGT editor.
- Promotion in print edition of National Geographic Traveller **(150,000 readers)**.
- Promotion on nationalgeographic.co.uk – **750,000** unique readers per month.
- Promotion on social media – **300,000** followers across Facebook, Twitter and Instagram.
- Promotion on at least one weekly newsletter – **30,000** subscribers.

Results:

- **2,600** views (Second most watched video) on National Geographic Facebook page in the last two years.
- **61%** in post activity survey said they were extremely likely to visit North Carolina.

Our office took part in the Brand USA Travel Week show for European tour operators. We met with more than 40 operators over the three-day show.

Germany

Market Highlights:

- No. 2 overseas market with 10,372 visitors to North Carolina in 2021.
- Visitors spent \$10.9 million.
- The three daily non-stop flights from Munich and Frankfurt to the state returned in fall 2021.

Travelzoo campaign

We conducted a sponsored content campaign with Travelzoo in June 2021. The program included a sponsored story, social media posts promoted through their weekly newsletter to 1.1 million subscribers/members. Three German tour operators (CRD, CANUSA and America Unlimited) were included and offered different packages.

All of the three integrated partners have reported a positive feedback highlighting the quality of traffic in comparison to regular placements on the Travelzoo website.

Results:**Distribution**

- Top 20 send out to 1,100,000 members
- Homepage promotion for two weeks
- Ongoing website promotion in related categories
- Social media boost on Facebook, Twitter and Instagram

Reach

- Total impressions: 334,532
- Homepage promotion impressions: 104,767
- Social media promotion impressions: 10,229

Engagement:

- Total page visitors: 4,163
- Average dwell time on destination showcase format: 1:53 min
- Clicks on deals within campaign profile: 1,859
- CTR (content visitors vs. click on deals): 44.6%

CANUSA Campaign**Social Media Marketing package**

In cooperation with Georgia and South Carolina we accomplished a social media Campaign with different social media channels as well as Newsletter inclusion and a stand-online newsletter.

Results:**Social Media Channels**

- Runtime: May 31 - June 30, 2021
- Facebook fans: 70,000
- Instagram followers: 8,400
- Ad impressions: 101,866
- Facebook reach: 10,571
- Instagram reach: 6,251
- Pinterest reach: 4,144

Exclusive Newsletter

- Dispatch: June 2, 2021
- Newsletter readers: 40,000
- Opening rate: 35.21 %
- Click rate: 3.86 %

Other International News**Travel South USA****Travel South Global Partnership Representation**

Even with travel restrictions and flights halted Visit NC stayed in market to be top-of-mind when the borders reopened for international travel. No familiarization trips were realized due to the border closures.

In all markets, NC was featured in travel trade newsletters, trainings, and press releases throughout the year.

Australia – Presence on Vaacay.com – an inspirational travel website. NC had the second most visits of all southern states.

Brazil – New to the market in the second half of 2021. The Travel South newsletter focused on NC/TN to 13,000 travel professionals had an open rate of 32.1% and click through of 2.7%.

China – Continued WeChat posts monthly

France – In partnership with Delta Airlines, Sean Lilly Wilson of Fullsteam Brewery was interviewed for the Visit USA network of travel professionals around the country.

Netherlands- The Travel Academy that features North Carolina has been visited 9,930 times and trained nearly 500 agents during the pandemic. North Carolina was featured in monthly newsletters to 966 agents across the country.

- IPW in Las Vegas – Opening day was the announcement that the borders would open in Nov.
- Attended Travel South International Showcase in New Orleans along with partners from Explore Asheville, Nantahala Outdoor Center, Visit Charlotte and Visit Raleigh. Together NC met with more than 100 tour operators from 12 countries.
- Hotelbeds promotion through Travel South. The campaign delivered **47,755 room nights Jan-June 2021**, representing an **83% increase over same period 2020** in hotels across the state from Aberdeen to Winston-Salem.
- **Brand USA Co-op Marketing Programs** – All campaigns were halted until late 2021 with results being posted in 2022.

Tourism Development

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

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

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

Tourism Resource Assistance Center (TRAC)

The Tourism Resource Assistance Center (TRAC) program was developed to bring Visit NC's program managers to local, mostly rural communities to share and discuss the nuts and bolts of partnering effectively with Visit NC. At a TRAC, Visit NC brings staff from every department to an area and hosts local tourism businesses for the entire day. No appointment is needed so small business owners can come at a time that is convenient for them.

TRAC Sessions 2021:

- We were unable to host any additional TRAC sessions due to COVID-19.

During the pandemic the Partner & Industry Relations team regularly called all of our more than 100 partners to gauge how the pandemic was affecting their areas and to find out how Visit NC could assist.

Consumer Show Attendance

Visit NC will continue to work with partners in attending consumer shows but 2021 shows were cancelled due to COVID and will resume in 2022.

Community Partnerships and Heritage Development

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

North Carolina Civil War Trails

The Civil War Trails Program is marketed in five states – Virginia, Maryland, West Virginia, Tennessee and North Carolina, with more than 1,000 interpretive markers. Visit NC continued to partner with the **NC Department of Transportation** and **NC Department of Natural & Cultural Resources** to promote the NC Civil War Trails program. Marketing Universals were developed by Civil War Trails Inc. and all five state partners to display the program as the “best” and most factually authentic way to experience Civil War history, using social media, print and online advertising.

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

Cultural Heritage Trails Development

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

Certified Retirement Community Program

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

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

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

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

Visit NC continued to promote certified communities and areas of North Carolina during the Ideal Living Regional Expos in Long Island, NY; Chicago, IL; and Greenwich, CT; along with virtual expo in September 2021 in New Jersey and Washington D.C.

Results:

- 5,800 leads generated.
- 750 packets downloads from RetireNC.com.
- 204 packets mailed through the Call Center.
- 2,945 tracked moves to North Carolina.

Visit North Carolina's certified communities include:

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

Industry Relations

Visit NC 365 –held virtually

Visit NC's annual conference for the state's travel and hospitality industry was held virtually due to continuing COVID-19 restrictions.

Tourism Week in Raleigh - Cancelled

U.S. Travel Association's Destination Capitol Hill

Originally scheduled for April 1, the event was cancelled, and a virtual event held later in the summer. Visit NC along with two local tourism office partners held appointments with key legislators in Washington, D.C.

North Carolina Film Office (FilmNC)

The year 2021 set new records for film production spending in North Carolina as the state saw more than \$416 million directly spent by productions over the course of the calendar year. All told, 71 projects officially filed with the North Carolina Film Office, creating more than 28,500 job opportunities.

Here is a further breakdown of the projects:

2021 Total Production Estimates & Highlights* from N.C. Film Office:

- 71 projects.
- \$416,231,538 direct spend by productions.
- 2,938 production days.
- 28,517 jobs opportunities created.
- 488 crew, 1,382 talent, 21,647 extras

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

Production highlights for 2021 include the following television, streaming, and feature film projects:

- Television/streaming series
 - “Our Kind of People” (Season 1) – Wilmington Film Region (grant recipient)
 - “The Peripheral” (Season 1) – Western NC Film Region (grant recipient)
 - “Florida Man” (Season 1) – Wilmington Film Region (grant recipient)
 - “The Summer I Turned Pretty” (Season 1) – Wilmington Film Region (grant recipient)
 - “Hightown” (Season 2) – Wilmington Film Region (grant recipient)
 - “Welcome to Flatch” (Season 1) – Wilmington Film Region (grant recipient)
 - “Delilah” (Season 1) – Charlotte Film Region (grant recipient)
- Event series
 - “Echoes” – Wilmington and Western NC Film Regions (grant recipient)
 - “George and Tammy” – Wilmington Film Region (grant recipient)
- Feature films and made-for-television movies
 - “I.S.S.” – Wilmington Film Region (grant recipient)
 - “The Black Phone” – Wilmington Film Region (grant recipient)
 - “Are You There God? It’s Me, Margaret” – Charlotte Film Region (grant recipient)
 - “Along For The Ride” – Wilmington Film Region (grant recipient)
 - “Line Sisters” – Wilmington Film Region (grant recipient)
 - “County Line: All In” – Charlotte Film Region (grant recipient)
 - “County Line: No Fear” – Charlotte Film Region (grant recipient)
 - “One Summer” – Wilmington Film Region (grant recipient)
 - “Christmas In Harmony” – Wilmington Film Region (grant recipient)
 - “One True Loves” – Wilmington and Northeastern Film Regions (grant recipient)
 - “Breakwater” – Wilmington Film Region (grant recipient)
 - “Barstow” – Charlotte Film Region (grant recipient)
 - “Something Here” – Charlotte Film Region (grant recipient)
 - “The Other Zoey” – Charlotte and Western NC Film Regions (grant recipient)
 - “Boys of Summer” – Wilmington Film Region (grant recipient)

Additionally, non-grant recipients that produced projects in the state were the feature-length film “Abandoned” (Research Triangle Film Region) and national commercials for Huffy, Ryobi, Toyota, and

Chevrolet. Reality series “Wicked Tuna: Outer Banks”, “Military Makeover”, and “My Big Fat Fabulous Life”, as well as several travel-related and real estate series, also filmed in North Carolina in 2021.

Because of ongoing adjustments made by the industry due to Covid-19, virtual desk visits once again replaced FilmNC’s normal quarterly desk visits and tradeshow/film festival participation.

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

Finally, as a result of the uptick in productions, FilmNC expanded its staff to include a new full-time employee whose main responsibilities relate to assisting productions—via permits and contacts—and their efforts on the ground within the state.

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