

2022 Annual Report

Visit North Carolina

A Part of the Economic Development Partnership of North Carolina

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

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2022 NC Travel and Tourism Board

Listed here is the Board for the year 2022 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

Christopher Chung

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

Secretary Machel 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

James Meacham

Rowan Co. TDA
Appointed By: DMANC

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

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

Andrew Schmidt
Greenville/Pitt Co. CVB
Appointed By: NCTIA

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."

2022: The Year in Review

The North Carolina tourism industry saw continued recovery in 2022 with \$33.3 billion in visitor spending statewide, the highest level ever. Increases were particularly felt in North Carolina's urban areas. Wake, Mecklenburg and Durham were among the counties that led the state's 15.2 percent growth in visitor spending. Forty-five of the state's 100 counties had double-digit increases in visitor spending from 2021.

The state's tourism-supported workforce increased 9.8 percent to 216,900 jobs in 2022. Tourism payroll increased 13.5 percent to \$8.7 billion. Also, as a result of visitor spending, state and local governments saw rebounds in tax revenues to nearly \$2.5 billion.

Source: Tourism Economics

Partnerships with destinations, attractions, lodging and dining properties and associations statewide remain key to North Carolina's success. In 2022 North Carolina was the sixth most visited state in the nation for domestic visitation.

Source: OmniTrak TravelTrakAmerica

Program Highlights for 2022

Direct employment generated by travelers in North Carolina increased 9.8 percent in 2022 to 216,900 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 2022, visitors in North Carolina spent more than \$91 million and contributed more than \$6.7 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 2022 generated an 72 percent Arrival Lift. This means those who saw Visit NC's owned and paid digital media have an 72 percent higher arrival rate to the state than a similar audience who didn't see our digital media but came on their own.

2022 Results

Visitor Spending

In 2022, it is estimated that visitors to North Carolina spent \$33.3 billion in the state, an increase of 15.2 percent from 2021. Visitor spending directly supported 216,900 jobs for North Carolina residents and the tourism industry directly contributed \$8.7 billion to the state's payroll in 2022.

Traveler spending generated \$4.2 billion in federal, state and local tax receipts, an increase of 7.9 percent from 2021.

Source: Tourism Economics

2022 Travel Volume

North Carolina person-trip volume was 43 million in 2022, ranking North Carolina No. 6 in total domestic person-trip volume.

Source: Omnitrak

2022 Total State Rankings by Volume

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

Source: Omnitrak

Average Trip Spending

North Carolina overnight visitor parties spent approximately \$814 per trip in 2022. Out-of-state visitors spent approximately \$910 per trip in 2022, while in-state resident travel parties spent \$652 per trip on average. This represents a 33 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 \$975 per trip in 2022.

Source: Omnitrak

Average Overnight Trip Duration

The average length of stay of North Carolina visitors was 3.4 nights in 2022. Resident visitors stayed an average of 2.6 nights, while out-of-state visitors stayed an average of 3.8 nights.

U.S. travelers stayed an average of 3.5 nights per trip in 2022.

Source: Omnitrak

North Carolina's Top States of Origin for Overnight Visitors

- NC 37%
- VA 10%
- SC 9%
- GA 7%
- FL 5%
- PA 4%
- NY 4%
- MD 3%
- TN 3%
- NJ 2%
- TX 2%

Source: Omnitrak

NC's Activities for Overnight Visitors

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

While visiting friends and relatives and shopping are routinely mentioned every year among all travelers, other activities such as the beach, fine dining, visiting historic areas, rural sightseeing, hiking, local arts & crafts, state/national parks, visiting craft breweries and trying unique local cuisine were among the most popular specific activities surveyed.

Source: Omnitrak

Visit North Carolina Budget Overview

Marketing Media Purchase & Production	\$5,606,863
One-time COVID Recovery Funding (marketing)	\$15,000,000
Personnel & Administration	\$1,605,647
Rent, Facilities and Computers (tech and licensing)	\$278,341
VisitNC.com Dev. & Maintenance (Interactive)	\$599,200
International Marketing (Canada, Germany, UK)	\$1,252,880
Film Office Marketing	\$410,588
Public Relations	\$576,740
Domestic Sales Promotion (Group and Sports)	\$104,520
RetireNC and Industry Relations	\$176,890
Research	\$809,814
TOTAL	\$26,421,483

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	\$2,514,895
Inquiry/Fulfillment	407,568
<hr/>	
Total	\$2,922,463

State Tourism Office Budgets: 2022-23

North Carolina's budget of approximately \$26.4 million included special one-time funding from the legislature to assist in COVID recovery for the state's tourism industry over the next three years. Unfortunately, due to other states receiving similar funding for recovery efforts in their states, our budget continued to be among the lowest among southern state tourism office budgets in 2022-23, significantly behind several states that are direct competitors.

State	Projected 2022-23 Budget	Number of FTE staff
Tennessee	79,100,000	35
Virginia	78,000,000	59
Louisiana	48,500,000	28
South Carolina	35,500,000	17
Missouri	34,000,000	15
West Virginia	31,700,000	22
North Carolina	26,400,000	14
Arkansas	26,000,000	12
Alabama	23,800,000	28
Mississippi	18,200,000	18
Georgia	11,400,000	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 2022

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 2022 generated a 72% Arrival Lift. This means those who saw Visit NC's owned and paid digital media had a 72% 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

Like our competitor states, North Carolina saw a significant rebound in travel in 2021. From the depths of the pandemic, North Carolina had nearly returned to the record 2019 benchmark in visitor spending. Now 2022 presented a new challenge. Consumers were now "revenge travelers," with a keen desire to see the world again.

With the additional One-time COVID recovery funding added to our tourism marketing funds received in 2022, Visit North Carolina was able to develop a new marketing campaign strategy to be able to showcase all three regions of the state in all four seasons with equal marketing support. We used the funds in year one to capture content from across the state filming in more than 14 locations statewide and develop campaign creative to showcase all that our state has to offer to a visitor year-round. We also expanded our target markets, increasing our spending in emerging markets like the Midwest and deepening our spend in traditional markets such as New England, New York and the Southeast.

Pent-up demand to return to big cities and more distant, exotic escapes was motivating many, yet others still yearned for the experiences they had missed most. While many of these travelers had been to North Carolina before, few had experienced all the state has to offer from the tallest mountains east of the Rockies to more than 300 miles of barrier island coastline. So, Visit NC's focus was on inspiring travel to North Carolina by showcasing more of the many rich, relatable experiences waiting to be discovered just down the road.

The business goals were straightforward. Develop a breakthrough campaign inspiring and elevating North Carolina above its competition, driving an increase in travel to the state while also capturing new consumer email addresses with permission to message, critical to creating and nurturing connections in the age of increasing privacy sensitivities. Success was measured by a comprehensive research and analytics program including, but not limited to, an advertising effectiveness/ROI study and overall economic impact study in partnership with respected third-party experts.

Attention was focused on avid, overnight travelers across all adult demographics, interests and abilities whether interested in booking long weekends, workcations or full-fledged vacations. Inspiring and converting these active "travel intenders" in North Carolina's proven drive markets along the Eastern Seaboard and "near Midwest," including the states of FL, GA, SC, TN, VA, MD, NJ, NY, PA, OH and also DC.

Research confirmed prospective visitors believed their vacation memories were more valuable than the purchases they'd made during the height of the pandemic. More than ever, it was important to make every trip count, reconnecting with loved ones and immersing themselves again in truly authentic places and their sights, sounds and flavors to create those lasting memories. Whether exploring one of our welcoming cities for the first time, exploring a new gem in the NC mountains or reconnecting for the

annual family gathering on our beaches, there are always new, exciting and rewarding things to see, foods to try and adventures to experience.

For repeat or first-time visitors, North Carolina creates Firsts That Last®. Initially launched in 2018, the Firsts That Last campaign had quickly gained traction and acclaim before being stopped in its tracks by the COVID pandemic in spring 2020. After two years in the fight against COVID-19 including Visit NC's Count On Me NC public safety initiative, Visit NC rekindled the magic of Firsts That Last in 2022 by engaging 12 independent film makers with the opportunity to bring to life their own unforgettable, real-life adventure of a first in North Carolina. The campaign began by identifying 11 film makers from among a field of more than 60 entries based on the proposed storylines celebrating the enduring value of North Carolina travel experiences. The 12th film, the "People's Choice," was selected by a consumer vote on visitnc.com.

A multi-channel effort generated awareness for the film competition, and more importantly encouraged prospective travelers to view the film makers' stories and begin planning their own story and trip. Visit NC curated an abundance of assets from the films and leveraged those across TV/VOD/OTT, digital video, sponsored content, display, paid and organic social, paid search, print and media relations. Firsts That Last films also rolled on visitnc.com where, along with the inspiration from entries that spanned the state, the website offered complementary ideas and information for trip planners plotting their own journeys. A virtual premiere on YouTube engaging both film makers and viewers was also held.

The Firsts That Last Film Series campaign generated results well beyond expectations. Among the highlights:

- 16 million views of the Firsts That Last films with a 100% completion rate, and other campaign performance measures consistently above industry and travel sector benchmarks.
- 91% year over year increase in first party data collection.
- 43% awareness among all traveling households in target markets, despite a relatively limited September-November shoulder season run for the bulk of the campaign due to funding constraints.

Journeys unfold in places you'd expect and some you wouldn't. The stories showcased in the Firsts That Last Film Series campaign inspired Visit NC's target audience to make every trip count by immersing themselves in North Carolina's natural wonders, cities and culture, and adding meaning and memories to their lives.

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

- 43% consumer awareness for the campaign
- Cost per aware household of 36 cents was just above the benchmark of 31 cents
- Advertising generated an 11-point lift in likelihood to visit
- Campaign excelled at communicating its specific goals, with the majority of objectives 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
- "Firsts That Last" 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 rating as a place for a leisure visit among its competitive set

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

- Sparked 748,273 trips and \$1.1 billion in incremental visitor spending
- Generated \$217 in visitor spending per dollar of media investment
- ROI of \$20:1 in state and local taxes generated per dollar of media investment

Paid Social

In 2022, Visit NC executed a diverse social campaign across paid social and influencer. We ran paid social advertising across Facebook and Instagram, connecting with our core high travel-intent audience through traffic optimized static and video ads. We also ran an influencer program on IG, TikTok, Pinterest and blogs, sending five travel-minded creators to NC to experience their Firsts that Last. Combined efforts accounted for more than 57 million impressions, 561K link clicks, 182K engagements (likes, shares, pins), and 7 million video views.

Organic Social

The Visit NC team's organic social efforts in 2022 also generated strong performance across multiple channels. Among the highlights:

- Visit NC yielded more than 8.5 million impressions and 362,231 organic engagements on content deployed across Instagram, Facebook, Twitter and Pinterest during 2022.
- All average organic engagement rates surpassed industry benchmarks for the year. (Pinterest industry benchmarks are unavailable)
- Instagram: 5.52% (Travel Industry Benchmark: 1.41%)
- Facebook: 0.68% (Travel Industry Benchmark: 0.27%)
- Twitter: 0.64% (Travel Industry Benchmark: 0.04%)
- The top-reaching platform was Instagram with a combined 5.9 million impressions across in-feed posts and stories. Instagram also enjoyed the highest engagement rate.
- Pinterest maintained success in a revived relevancy. The platform yielded 936,609 million impressions from only 42 posts.

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 5.76 million impressions, 472,300 clicks, and nearly 86,000 downstream clicks. Additionally, paid search drove 1.8K Travel Guide sign-ups, 1.4K Travel Brochure page views, and 72 E-Newsletter signups.

Print

In 2022, the plan included titles and categorized bundles based on strategic alignment across both brand and co-op partner interest.

Atlanta Magazine
Blue Ridge Country
Bridal Guide
Carolina Country
Cleveland Magazine
Columbus Monthly

Garden & Gun
Orlando Magazine
Outside Magazine
Our State Magazine
Philadelphia Magazine
Pittsburgh Magazine
South Carolina Living
Southern Living
Tennessee Magazine
Washingtonian

Additional Campaign Highlights

Drive-Thru Vacations

In 2022, Visit NC and its “Drive-Thru Vacations” pandemic travel inspiration campaign outlined in the 2021 annual report received a National ADDY® Award from the American Advertising Federation and two Mercury Awards from the U.S. Travel Association’s National Council of State Tourism Directors.

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 2022 Key Performance Indicators

8,155,883 site page views
12,990 site visitors participating in sweepstakes
20,602 Travel Guides ordered from website
19,152 downloads or views of virtual brochures
1,930,226 views of story pages
61,271 new subscribers to Visit NC eNewsletters
281,195 site searches performed
12,425 clicks to view online travel publications
1,158,827 clicks to partner websites
39,225 clicks to view travel deals
2,621 on-site video views
24,158 mobile phone calls

Virtual Brochures

109 virtual brochures
19,152 downloads or views

Featured Event Listings

22 participating partners
106 total featured events
101,519 views of featured events
23,011 clicks to partner sites

Sweepstakes

8 sweepstakes
12,990 total entries

Most Popular Sweepstakes

Dream Big in Small Town NC – Spring in the Scenic NC Mountains (8,003 entries)
Outdoor NC Pledge Sweepstakes – p4 (1,706 entries)

Family of Sites

Media.VisitNC.com

11,765 sessions
2.5 actions per visit
1:51 average site duration

RetireNC.com

15,057 sessions
2.14 page views per session
2:30 average session duration

SportsNC.com

4,644 sessions
1.53 page views per session
0:58 avg. session duration

FilmNC.com

69,051 sessions
1.97 page views per session
1:35 avg. 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.

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 November 2022 – December 2023 cooperative marketing effort targeted NC, FL, GA, SC, VA 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 124,000 site sessions and more than 30,000 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 42,803 spots representing a value of \$2,652,263.

North Carolina Press Foundation

Member publishers provided more than 3,500 ads representing an estimated value of \$875,000.

PBS North Carolina

PBS North Carolina's award-winning team airs 52 weekly episodes of its popular show *North Carolina Weekend*. In its twentieth 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 \$2.5 million in valuable exposure while featuring more than 200 destinations, attractions and events across the state.

Public Relations

In 2022, the Public Relations program played to the strength of its core media relations strategy with hosted visits from editors, writers and influencers. Over the course of the year, Visit NC supported 38 trips by domestic and international media representatives on individual and group visits to 40 destinations that represented a mix of Tier 1, Tier 2 and Tier 3 counties.

With pandemic restrictions eased, out-of-state media missions resumed as a key program that enables partners from local tourism offices to meet with travel media to generate interest in visitation and coverage. Visit NC's PR team led small-scale missions to New York, Nashville, Atlanta and Tampa/Miami with 19 different destination partners participating. The team also hosted a successful in-state media mission in Durham with 36 local tourism partners and 35 media representatives attending.

Additional PR success resulted from a dedicated response to reactive media leads. From these efforts, the team garnered more than 50 placements in outlets including Forbes, Travel + Leisure, Conde Nast Traveler, Smithsonian magazine, Food + Wine, Real Simple, Southern Living, USA Today, Lonely Planet,

Garden & Gun, The New York Times and Fodor's Travel. Consumer impressions from PR activity totaled more than 5.5 billion with coverage representing 47 counties, 33 of which were classified as Tier 1 or 2.

Visitor Services

North Carolina's nine Welcome Centers hosted **7,587,589** visitors in 2022. A breakout of the number of visitors by Welcome Center location is below:

2022 Welcome Center Estimated Visitors	
I-95 S	824,202
I-95 N	1,544,517
I-85 S	733,922
I-85 N	520,275
I-77 S	406,546
I-77 N	1,003,119
I-40 W	880,752
I-26 W	299,248
I-26 E	1,335,008
Total:	7,587,589

- The I-95N Welcome Center was the most visited in 2022, hosting 1,544,517 travelers.
- Welcome Centers registered 6,362 visitors from other countries, overwhelmingly from Canada.
- The I-95S Welcome Center in Robeson County is under construction and scheduled to reopen by January 2024. The Welcome Center staff has been maintaining operations at the I-95 Northbound Cumberland County Rest Area.

- 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 2022, Visit NC contracted with Meredith Travel Marketing to produce the Official 2023 North Carolina Travel Guide published annually each year by mid-December 2022. The Official Travel Guide serves as Visit NC's primary fulfillment piece for potential visitors to and within the state. To underscore the diversity of travel options and depth of the program, the guide features a different cover for each of the state's three major regions. In the mountains, a shot of the dog-friendly Bearwallow Mountain Trail near Hendersonville sets hillside greenery against blue skies and mountain peaks. ARTivity on the Green, Winston-Salem's photo-ready downtown art park, represents the creative spirit that infuses the state's Piedmont cities. The coastal cover, depicting White Lake Holiday Resort in White Lake, invites discovery of the inland beaches surrounding North Carolina's phenomenal bay lakes. Drawing on authentic experiences found in all 100 counties, the guide creates fresh ways to explore cities, towns and the outdoor wonderlands at the heart of 2023's Year of the Trail celebration.

In all, the 108-page guide features 175 towns and cities and highlights nearly 400 attractions, restaurants, lodging properties and events with more than 180 images capturing the state's allure. A fold-out map, which is supported by a Town and City Index, expedites navigation as travelers chart getaways. Throughout the guide, readers will find references to initiatives including [Dream Big in Small Town NC](#), the sustainability-focused [Outdoor NC](#) program, [Accessible Fun for All](#), the Paw of Approval for pet-friendly travel and the [Firsts That Lasts](#) film series.

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](#) 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 target audiences. Visit NC polybagged 100,000 of the 2023 Travel Guides in Midwest Living and Real Simple with geo-specific interest. Nearly 5,000 guidebooks were distributed directly to inbound travelers through Raleigh-Durham International Airport, Asheville Regional Airport, and Wilmington International Airport.

The 108-page, 2023 Travel Guide was produced by Meredith Travel Marketing. It was financed by private industry support with \$833,516 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 2022, *NewsLink* covered more than 500 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.

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.

Domestic Partner Marketing

Southeast Tourism Society Domestic Discovery, February 13-15, 2022, Virginia Beach, VA

It is the premier Marketplace event in the Southeast where over 600 tourism professionals gather for 2 days of intensive meetings with a goal of delivering more visitors, spending more time, and more money in the Southeast region. This regional appointment-style marketplace offers the most targeted opportunity for group tour operators, tour wholesalers, and group tour leaders can meet face-to-face with Suppliers from the Southeast region. Visit NC had 34 scheduled appointments with group tour planners and nine partners represented.

Sports

TEAMS Conference, October 24-28, 2022, Oklahoma City, Oklahoma

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 October 24-28 in Oklahoma City, Oklahoma. 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 40 scheduled appointments; we were joined on our North Carolina sponsored aisle with local tourism offices across the state.

Cycle North Carolina, October 1-8, 2022

Cycle NC's 23rd Annual Mountains to Coast ride rolled through North Carolina in October 2022. The 2022 event had 800 participants from 39 states, plus Washington, D.C., Canada, Germany, and France. The ride was scheduled to start in Lake Junaluska, and have overnight stays in Hendersonville, Tryon, Belmont, Albemarle, Laurinburg, and Whiteville, ending at Holden Beach. The first two days were cancelled due to Hurricane Ian. The route passed through Cleveland, Rutherford, Richmond, Scotland, Hoke, Robeson, Columbus, Gates, Polk, Gaston, Stanly, Montgomery, Transylvania, Henderson, Mecklenburg, Cabarrus, and Brunswick County.

For the sixth 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 and attractions.

International Marketing

Canada

Market Highlights:

- Multiple daily non-stop flights to Charlotte Douglas and Raleigh-Durham airports
- No. 1 international market with 269,138 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.

Cooperative Marketing & Advertising Opportunities

Canada: Brand USA Multi-channel campaign

- The campaign had 2,774,381 total impressions with Travel South ads, Expedia, Google and Postmedia
- Postmedia delivered 1,030,773 impressions with a CTR of .13%
- Google Display had 4,044 clicks with a CTR of .48%
- Expedia hotel bookings: 7,336 room nights, \$1,046,090 in revenue
- Expedia flights: 2794 flights, \$1,038,725 revenue

Overseas Visitors

In 2022, North Carolina attracted 582,867 international visitors who spent an estimated \$599 million in the state. Canada, the U.K., Germany, India and Mexico were the top countries of origin to the state in terms of visitor volume. Other top countries of origin were Brazil, France, Australia, Spain, China, Italy and the Netherlands.

North Carolina's Top 20 International Markets by Market Share (Ranked by Visitors)

Rank	Country of Origin	2022 Estimated Visitors	Percent Change from 2021	2022 Estimated Spending	Percent Change from 2021	Average Spending per Visitor
1	Canada	269,138	454%	\$127,214,942	539%	\$473
2	United Kingdom	42,586	294%	\$64,683,588	405%	\$1,519
3	Germany	28,960	179%	\$39,098,264	258%	\$1,350
4	India	26,578	167%	\$41,170,684	124%	\$1,549
5	Mexico	19,400	5%	\$6,092,569	-7%	\$314
6	Brazil	15,360	333%	\$33,653,410	311%	\$2,191
7	France	9,210	161%	\$11,438,555	181%	\$1,242
8	Australia	8,493	588%	\$19,516,762	1133%	\$2,298
9	Spain	8,193	141%	\$9,324,495	239%	\$1,138
10	China	8,029	287%	\$17,641,316	28%	\$2,197
11	Italy	6,948	188%	\$8,722,245	263%	\$1,255
12	Netherlands	6,930	1,189%	\$7,868,817	1,548%	\$1,136
13	South Korea	6,707	235%	\$12,178,718	39%	\$1,816
14	Japan	5,313	233%	\$8,610,098	183%	\$1,621
15	Sweden	4,054	276%	\$5,609,374	319%	\$1,384
16	Ireland	3,992	278%	\$5,006,150	594%	\$1,254
17	Argentina	3,450	102%	\$4,736,637	224%	\$1,373
18	Israel	3,403	90%	\$4,396,858	56%	\$1,292
19	Switzerland	2,557	126%	\$4,984,536	162%	\$1,949
20	Poland	2,389	427%	\$4,646,626	376%	\$1,945
Total		582,867	177%	\$598,957,552	110%	\$1,028

**Tourism Economics, 2023*

U.K. and Ireland

Market Highlights:

- The top overseas market to North Carolina with more than 42,586 visitors in 2022
- 2 direct non-stop flights from Heathrow to Raleigh-Durham Int'l Airport and Charlotte Douglas Int'l Airport.

2024 U.S. Open promotion in the UK

Along with the South Carolina tourism office, Visit NC held a VIP day at the British Open in St. Andrews for golf tour operators and media to promote the upcoming 2024 US Open in Pinehurst.

Brand USA

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 28,960 visitors to North Carolina in 2022.
- The three daily non-stop flights from Munich and Frankfurt to the state.

Canusa fam with Icelandair to Raleigh, Durham and Wilmington, 7 reps from the sales and social depts. A week of posting on Instagram and a You Tube video getting nearly 500 views.

McDonald's – Get Back to a Better Place video ran in 720 restaurants 300,000 times in Jan 2022. Opportunity provided at no cost.

America Unlimited Taxi Quiz – modeled after USA's Cash Cab riders watched our video, we produced a few years ago and then took a quiz to win travel vouchers. The edited videos were posted and had 7466 views on You Tube and 11,700 on Facebook. Results 756 room nights booked.

Other International News

Travel South USA

Travel South Global Partnership Representation

With travel restrictions lifted and flights restarted Visit NC stayed in market to be top-of-mind visitors once again felt comfortable traveling long haul.

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%. NC hosted an influencer that visited the High Country.

China – Continued WeChat posts monthly

France – In partnership with Delta Airlines, John Caveny, with Grandfather Mountain, was interviewed for the Visit USA network of travel professionals around the country. In addition, Visit NC was part of a sales and media mission to Paris.

- IPW in Orlando with partners from Boone, NOC, Charlotte and Raleigh
- Participated in Brand USA's Travel Week in Frankfurt, Germany. Greater Raleigh CVB attended with us.
- Attended Travel South International Showcase in Louisville 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. NC then hosted a fam to the High Country and Charlotte.

Sparkloft Instant Experience to promote the new Icelandair flight to Raleigh. Originally set up for the Nordic markets, it saw a great response also in the UK. 316,000 engagements with 14% recall (4% is average)

Vacaay.com 2022 – Online inspiration travel site. Global Challenge campaign achieved 128% over goal for engagements in culinary, 133% over in engagements for outdoor adventure. NC was the first state to achieve these results in the Travel South group.

Hotelbeds 2022- 108,453 room nights booked, \$11.3 million in revenue, 37 NC destinations featuring 1204 hotels in 2022. That's an increase of 60% over 2021. Campaign ran in US, Canada, UK and Germany.

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 2022:

- TRAC sessions were back up and running from the 2021 postponement due to COVID-19. TRAC resumed with (3) partners participating – Crystal Coast (Carteret Co.), Ocracoke (Hyde Co.), Old Fort (McDowell Co.).

Consumer Show Attendance

Visit NC led groups of in-state partners at two Consumers Shows in 2022:

1. Travel & Adventure Show DC – Partners (Greenville-Pitt County CVB, Onslow TDA, Johnston County Visitors Bureau, Boone and Watauga County TDA)
2. Travel & Adventure Show NYC – Partners (Greenville-Pitt County CVB, Pender County Tourism, Ocracoke Business Association, Johnston County Visitors Bureau, Outer Banks TDA)

Community Partnerships and Heritage Development

Visit NC also continued to be actively engaged in the development of outdoor recreational/ecotourism/agritourism/heritage opportunities in the regions across the state. Farms, waterways, hiking and biking trails, greenways and open spaces are important features in a community that improve and promote quality of life and link people with their natural and cultural heritage. These partnerships include assistance in researching resources for communities, working with communities interested in Tourism Development Authority development, marketing initiatives, heritage trails development and product development plans. Created by congressional legislation, the **Blue Ridge National Heritage Area (BRNHA)** is supported through a partnership with Visit NC to assist in coordinating planning for the 25 counties in the designated region. Visit NC continued to assist in the implementation of the initiatives outlined in each county's heritage plan, and had an active role in assisting the BRNHA in developing, facilitating and guiding communities along the Blue Ridge Parkway for themes such as agriculture, arts and culture, traditional music, history/heritage and natural resources. In addition, Visit NC continued work on the **Blue Ridge Music Trails of North Carolina** with the BRNHA and the **NC Arts Council**, as well as collaborated closely with the communities participating with 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 238 sites in 72 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 and develop the African American Experience of Northeast North Carolina (AAENENC).
- 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:

- 5,130 leads generated.

- 250 packets downloads from RetireNC.com.
- 221 packets mailed through the Call Center.
- 1,628 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 in Durham

The 2022 Visit NC 365 Conference was held in March in Durham with enthusiastic reviews for the speakers, educational sessions and hospitality events. Nearly 500 attendees agreed it was wonderful to be able to gather again to discuss timely topics, network and basically just catch up with each other, and also to welcome new faces to the conference. The conference’s success is a credit to the Discover Durham CVB, the Durham Convention Center, the Durham Bulls and the host hotels for ensuring every attendee’s experience in Durham was memorable.

Sunday’s Opening Reception at the Durham Bulls Athletic Park offered the perfect opportunity for attendees to meet and greet on the ballfield and in the stands. On Monday, tourism, business and government leaders from across the state gathered for opening keynote speaker Shane Snow’s “Smartcuts for Accelerating Innovation & Thinking Differently.” Snow debunked myths of success, shared unforgettable research and stories, and fired up the audience.

Participants attended educational sessions, including the new 365 Express sessions, on subjects such as Outdoor NC, TikTok, visitation patterns, using data, cultural heritage tourism, economic forecast, EDA grants, and the Media Marketplace. Visit NC’s 2022-’23 partner co-op marketing program was unveiled, with a wide variety of opportunities in print, digital and social media, partnerships and pricing.

Tourism Week in North Carolina

Andre Nabors spoke at the Elizabeth City “Toast To Tourism” Tourism Week Kick-Off on Monday, May 2. He also participated in the Capital City Juneteenth Celebration meeting on May 3 and had an AARC board meeting May 4. Wit Tuttell spoke at Greenville’s National Tourism Week celebration on Tuesday, May 3.

U.S. Travel Association’s Destination Capitol Hill

Wit Tuttell led local North Carolina Convention & Visitors Bureau directors from Raleigh and Charlotte to meetings with the state’s federal legislators at the U.S. Travel Association’s Destination Capitol Hill program. Destination Capitol Hill allows the tourism industry to show a united front during direct touchpoints with lawmakers, speaking as one voice on behalf of the entire U.S. travel industry. Key talking points related to visitor and H2-B visas (temporary workers), FAA modernization, and funding for the new Assistant Secretary position in the U.S. Department of Commerce.

North Carolina Film Office (FilmNC)

While 2022 started off strong, following a record-breaking 2021, production, particularly on the key target of television/streaming series, began to slow down during the second half of the year due to the possibility of a work strike the following year (2023) by the industry’s writers and actors. Nonetheless, the state still saw a total of \$258 million directly spent by productions over the course of the calendar year, a figure that ranks among the top 10 all time. All told, 91 projects officially filed with the North Carolina Film Office, creating more than 16,000 job opportunities.

Here is a further breakdown of the projects:

2022 Total Production Estimates & Highlights* from N.C. Film Office:

- 91 projects.
- \$258,068,673 direct spend by productions.
- 2,000+ production days.
- 16,265 jobs opportunities created.
- 2,702 crew, 633 talent, 12,930 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
 - “The Summer I Turned Pretty” (Season 2) – Wilmington Film Region (grant recipient)
 - “Hightown” (Season 3) – Wilmington Film Region (grant recipient)
 - “Welcome to Flatch” (Season 2) – Wilmington Film Region (grant recipient)
 - “The Ultimatum: Marry or Move On” (Season 2) – Charlotte Film Region (grant recipient)
- Event series
 - “George and Tammy” – Wilmington Film Region (grant recipient)

- Feature films and made-for-television movies
 - “The Supreme’s At Earl’s All-You-Can-Eat” – Wilmington Film Region (grant recipient)
 - “Mother Couch!” – Charlotte and Wilmington Film Regions (grant recipient)
 - “Please Don’t Destroy: The Treasure of Foggy Mountain” – Charlotte and Western NC Film Regions (grant recipient)
 - “Eric LaRue” – Wilmington Film Region (grant recipient)
 - “To Her, With Love” – Charlotte Film Region (grant recipient)
 - “The Angry Black Girl and Her Monster” – Charlotte Film Region (grant recipient)
 - “A Little Prayer” – Piedmont Triad Film Region
 - “Providence” – Wilmington Film Region (grant recipient)

Additionally, national commercials for Twisted Tea, Chevrolet, Yamaha, Smartwool, and US Cellular were filmed in the state as well the tealoty series “Wicked Tuna: Outer Banks”, “Military Makeover”, and “My Big Fat Fabulous Life”, “Austin Dillion’s Life In The Fast Lane”, and “Indian Matchmaker” as well as several travel-related and real estate series.

2022 also saw desk visits return for FilmNC (had previously been paused due to the Covid-19 pandemic), with state film officials making official recruiting visits to the greater Los Angeles area three times during the year.

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.

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