

2018 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	6
2018: The Year in Review	6
2018 Results	9
Visit North Carolina Budget Overview	11
NC Visitor Services Budget Overview	11
State Tourism Office Budgets	12
Advertising	13
VisitNC.com	15
Public Relations	17
In-State Marketing Initiatives	18
Visitor Services	19
Publications	20
Domestic Marketing	21
International Marketing	23
Tourism Development	29
Industry Relations	33
North Carolina Film Office	34

2018 NC Travel and Tourism Board

Listed here is the Board for the year 2018 as required for the 2018 Annual Report. For information on the current board, please go to <https://partners.visitnc.com/travel-tourism-board-1>.

Sally Ashworth

Visit Lake Norman

Appointed By: Speaker of the House

Kevin Baker - completed term in December 2018

Piedmont Triad International Airport

Appointed By: Senate President Pro Tempore

John Beatty - completed term in October 2018

Summit Hospitality Group

Appointed By: NC Travel and Tourism Coalition

Rolf Blizzard

Turnpike Properties

Appointed By: NC Travel & Tourism Coalition

Stephanie Brown - appointed December 2018

Explore Asheville

Appointed By: Speaker of the House

Mike Butts, Chair - June 2018 to current

Visit Charlotte

Appointed By: NCTIA

Christopher Chung

Economic Development Partnership of NC

Appointed By: Economic Development Partnership of NC

Secretary Anthony Copeland

NC Department of Commerce

Appointed By: NC Department of Commerce

Kevin Corbin

North Carolina House of Representatives

Appointed By: Speaker of the House

Robert Danos - completed term in December 2018

NC Youth Camp Association

Appointed By: Senate President Pro Tempore

Sen. Chuck Edwards - appointed December 2018

North Carolina Senate

Appointed By: Senate President Pro Tempore

Jonathan Fussell - appointed December 2018

Duplin Winery

Appointed By: Senate President Pro Tempore

Richard Geiger - completed term in June 2018
Winston-Salem CVB
Appointed By: DMANC

Rep. Holly Grange - appointed December 2018
North Carolina House of Representatives
Appointed By: Speaker of the House

Joel Griffin
Griffin Stafford Hospitality, LLC
Appointed By: NCRLA - Lodging

Sen. Rick Gunn - appointed December 2018
North Carolina Senate
Appointed By: Senate President Pro Tempore

Mike Hawkins
Pisgah Enterprise
Appointed By: Economic Development Partnership

Sen. Ralph Hise - completed term in December 2018
North Carolina Senate
Appointed By: Senate President Pro Tempore

Kim Hufham - appointed June 2018
New Hanover TDA
Appointed By: DMANC

Rep. Patricia McElraft - completed term in December 2018
North Carolina House of Representatives
Appointed By: Speaker of the House

Richard Moore
Timm's Furniture
Appointed By: Governor

Tammy O'Kelley, Chair through May 2018 - completed term in December 2018
Heart of North Carolina Visitors Bureau
Appointed By: Speaker of the House

Joe Pierce
Charlotte Hornets
Appointed By: Governor

Sen. Norman Sanderson - completed term in December 2018
North Carolina Senate
Appointed By: Senate President Pro Tempore

Sharon Sexton - appointed December 2018
Caswell County Chamber of Commerce

Appointed By: Senate President Pro Tempore

William Traurig - appointed October 2018
Carolina Hurricanes
Appointed By: NC Travel and Tourism Coalition

Paula Wilber
The Biltmore Company
Appointed By: NCRLA - Restaurant

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."

In the five years since the inception of the EDPNC and Visit North Carolina, visitor spending in the state has increased an average of 4.7% annually. During that five-year period, marketing investment through Visit North Carolina's cooperative Partner Program has risen from \$659,816 in the 2014-2015 year to \$1,161,645 in the 2018-2019 program year, a 76% increase.

2018: The Year in Review

North Carolina's tourism industry achieved record performance in 2018, with estimated visitor spending at an all-time high of \$25.3 billion in direct spending, a 5.6 percent increase from 2017. Spending by travelers directly supported more than 230,000 jobs for North Carolinians, setting yet another record. Additionally, payroll income generated more than \$6.3 billion. Visitor spending generated more than \$2.0 billion in state and local tax revenues for reinvestment in communities all across North Carolina.

Source: U.S. Travel Association

Partnerships with destinations, attractions, lodging and dining properties and associations statewide remain key to North Carolina's success. Effective collaboration within the tourism industry contributed to North Carolina maintaining its position as the nation's sixth most-visited state.

Source: TNS TravelsAmerica

Program Highlights for 2018

Employment generated by travelers in North Carolina increased 2.2 percent in 2018. These travel-related jobs comprised 5.3 percent of total non-agricultural employment in North Carolina during 2018.

Source: U.S. Travel Association

On an average day in 2018, visitors in North Carolina spent more than \$69 million and contributed more than \$5.6 million in state and local taxes.

Source: U.S. Travel Association

Visit North Carolina 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 generated a 43.8 percent Arrival Lift. This means those who saw Visit North Carolina's owned and paid digital media have a 43.8 percent higher arrival rate to the state than a similar audience

who didn't see our digital media but came on their own. Following the spring 2018 TV flight in six key markets, reports showed a 69.7 percent Arrival Lift -- demonstrating the impact of TV combined with online digital media.

2018 represented a continuation of the strategic evolution for Visit North Carolina's brand. Building upon the successful promotional efforts of 2017, Visit North Carolina continued to market to its newly defined audience and showcase its repositioned brand to be even more effective moving forward. Visit North Carolina remains committed to focusing on its new core target which research identified as the *medium affinity, never-visited traveler* -- which represents the highest opportunity for new visitation and visitor spending based on a high rate of repeat travel to the state once someone has visited. Articulating what is most motivating, differentiating and compelling to that audience, Visit North Carolina completed the evolution of its brand strategy to "Richer Experiences," where travelers feel and experience every moment to the fullest to truly feel more in touch with themselves in North Carolina.

To execute our "Richer Experiences" brand strategy, Visit North Carolina found real first-time visitors -- not actors -- and captured them experiencing some of life's most awesome firsts in North Carolina, a state with an endless supply of opportunities to experience firsts and discover the state's natural beauty and authenticity.

There's something magical about firsts -- first impressions, first kisses, first finish lines crossed. The enchantment of experiencing something for the very first time is what inspired the North Carolina Firsts That Last campaign. It's a feeling that never gets old in North Carolina. In fact, with Firsts That Last, richer experiences were more fully integrated into the messaging strategy so visitors feel an emotional connection with themselves, the breathtaking land that surrounds them, the compassionate locals they encounter at every turn, and especially those they are traveling with. When visitors experience something for the first time in North Carolina, it makes a connection -- and a memory -- that lasts forever.

Visit North Carolina reached travelers in all stages of the planning and conversion funnel, including target market broadcast and digital tactics to drive awareness and affinity; seasonal digital campaigns driving awareness, site traffic and downstream conversion across display, native and paid social advertising; and always-on demand-capture paid search.

VisitNC.com ended 2018 with 6.619 million user sessions. These sessions drove 1.54 million downstream web referrals and 96,975 phone calls to North Carolina travel industry partners.

Social media continued its growth in 2018, with followers across Visit NC Facebook, Twitter and Instagram channels reaching more than 373,000 followers, a 15 percent growth year-over-year. 2018 saw 10 million engagements from organic social, a 106 percent increase from 2017. Paid social media is a powerful and efficient tool to further promote Visit NC content in-platform and on VisitNC.com, and helped lead a 110 percent increase in social referral traffic, with more than 1.6 million sessions.

Proactive public relations efforts expanded Visit North Carolina's outreach to key audiences with a program that generated more than 4.2 billion consumer impressions across the United States and internationally.

Cooperative marketing programs with NC travel industry partners coupled with our effective partnerships with in-state media associations resulted in an estimated \$9 million in incremental direct investment, in-kind support and value added brand exposure for North Carolina both within and outside the state.

The North Carolina Film Office continued to attract productions to film in the state. The year saw the continuation and maturity of the state's rebate program, which is monetized by the recently created Film and Entertainment Grant. For the 2018 calendar year, productions were estimated to have had a direct in-state spend of more than \$55 million while creating in excess of 4,100 job opportunities including 1,442 for the state's well-trained crew professionals. Among the many 2018 highlights were the filming of the pilot episodes of *Reprisal* and *Swamp Thing*--both of which were picked up to full seasons orders that filmed in 2019 in the state--new seasons of *Love It or List It*, *A Chef's Life*, *Wicked Tuna: Outer Banks*, *My Big Fat Fabulous Life*, *Toymakerz*, and new series *Race Night at Bowman Gray* as well as *Racing Wives*, and the yet-to-be released feature film *Words on Bathroom Walls*. The critically acclaimed independent feature film *American Animals* and multi award winner *Three Billboards Outside Ebbing, Missouri* also garnered the state attention during their theatrical releases in 2018 (the projects filmed in a previous calendar year).

Visit North Carolina's partnership with the North Carolina Sports Association continued to pay dividends with the state's success in attracting sporting events to small and large communities.

Tourism development outreach in small communities was strengthened through several initiatives, including an ongoing partnership with the NC Department of Commerce and NC Department of Natural & Cultural Resources on efforts including Cultural Heritage Tourism Development, Blue Ridge Music Trails and an expanded schedule for Visit North Carolina's Tourism Resource Assistance Center. We also continued to increase partner participation in the NC Certified Retirement Communities Program.

Please review the balance of this Annual Report for more details on Visit North Carolina's 2018 program of work and accomplishments. Visit North Carolina continues to collaborate with partners statewide to ensure North Carolina's continued success and growth as a preferred travel, film and sports destination and positive economic force for the entire state.

2018 Results

Visitor Spending

In 2018, it is estimated domestic visitors to North Carolina spent a record \$25.3 billion in the state, an increase of 5.6 percent from 2017.

All of North Carolina's 100 counties experienced growth in visitor spending in 2018.

Domestic visitor spending directly supported 230,560 jobs for North Carolina residents and the tourism industry directly contributed \$6.35 billion to the state's payroll in 2018.

Traveler spending generated \$3.95 billion in federal, state and local tax receipts, an increase of 4.8 percent from 2017.

Mecklenburg County received nearly \$5.7 billion in domestic travelers' expenditures, the highest in the state. Wake County ranked second with \$2.4 billion, followed by Guilford County with nearly \$1.5 billion, Buncombe County with \$1.2 billion and Dare County with nearly \$1.2 billion in visitor spending.

Onslow County had the largest percentage increase at 8.0 percent followed by Beaufort (7.7 percent), Johnston (7.1 percent), Cherokee (7.0 percent) and Madison (6.8 percent) counties. Richmond followed with a 6.7 percent increase. Brunswick (6.5 percent), Transylvania (6.5 percent), Henderson (6.4 percent) and Cleveland (6.2 percent) counties rounding out the top 10 largest increases in 2018.

Positive spending growth was seen throughout the state's economic development regions. The Southeast and North Central regions each experienced a 5.8 percent increase in spending to lead the state. All eight regions had spending growth of 5 percent or more.

Mecklenburg County had the largest direct employment in the tourism sector with 53,300 employees and the largest payroll at \$2.0 billion. Wake (23,974), Guilford (14,236), Dare (13,549) and Buncombe (12,090) counties each had more than 10,000 direct tourism employees.

All 100 of the state's counties saw direct tourism employment growth in 2018. The counties with the largest increases in direct tourism employment were similar to the counties setting the pace in visitor spending including Onslow (+3.1 percent), Johnston (+3.0 percent), Beaufort (+2.9 percent), Brunswick (+2.9 percent), Transylvania (+2.9 percent), Henderson (+2.8 percent) and Richmond (+2.6 percent) counties.

Source: U.S. Travel Association

2018 Travel Volume

North Carolina person-trip volume was 51.1 million in 2018, ranking North Carolina No. 6 in total domestic person-trip volume.

Source: Omnitrak

2018 Total State Rankings by Volume

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

Source: TNS Travels America

Average Trip Spending

North Carolina overnight visitor parties spent approximately \$721 per trip in 2018. Out-of-state visitors spent approximately \$853 per trip in 2018, while in-state resident travel parties spent \$474 per trip on average. This represents a 57 percent difference in average per trip among resident visitors traveling within the state and out-of-state visitor parties.

U.S. travel parties on average spent \$966 per trip in 2018.

Source: Omnitrak

Average Overnight Trip Duration

The average length of stay of North Carolina visitors was 3.4 nights in 2018. Resident visitors stayed an average of 2.5 nights, while out-of-state visitors stayed an average of 3.9 nights.

U.S. travelers stayed an average of 3.4 nights per trip in 2018.

Source: Omnitrak

North Carolina's Top States of Origin for Overnight Visitors

- NC 34%
- VA 9%
- SC 7%
- GA 7%
- FL 5%
- NY 4%
- PA 4%
- TN 4%
- OH 3%
- MD 3%
- NJ 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, exploring the state’s scenic beauty, state and national parks, and rich cultural assets are among the most popular specific activities surveyed.

Source: Omnitrak

Visit North Carolina Budget Overview

Marketing Media Purchase & Production	\$7,709,687
Personnel & Administration	\$1,147,270
Rent, Facilities and Computers (tech and licensing)	\$156,621
VisitNC.com Dev. & Maintenance (Interactive)	\$906,080
International Marketing (Canada, Germany, UK)	\$812,585
Film Office Marketing	\$307,330
Public Relations	\$547,487
Domestic Sales Promotion (Group and Sports)	\$268,179
Industry Relations	\$30,000
Research	\$469,969
RetireNC	\$66,275
TOTAL	\$12,421,483

North Carolina Visitor Services Budget Overview

The Visitor Services function remains part of the North Carolina Department of Commerce and was funded by appropriations from the General Assembly. Visitor Services, comprised of the State’s nine Welcome Centers, the Tourism Call Center and the Tourism Warehouse, is staffed by about 48 FTEs annually. Appropriations included:

Welcome Centers	\$2,260,854
Inquiry/Fulfillment	370,989
<hr/>	
Total	\$2,613,843

State Tourism Office Budgets: 2018-19

North Carolina's budget of approximately \$12.5 million ranked among the lowest among southern state tourism office budgets in 2018-19, significantly behind several states that are direct competitors. North Carolina's budget decreased by 4 percent from the previous fiscal year.

State	Projected 2018-19 Budget	Number of FTE staff
South Carolina	30,700,000	14
Louisiana	27,300,000	24
Virginia	24,200,000	58
Tennessee	20,400,000	26
Alabama	19,700,000	24
Arkansas	17,600,000	23
North Carolina	12,400,000	13
Kentucky	11,900,000	19
Georgia	11,400,000	16

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

Advertising

Print

Print advertising garnered 13,823,171 impressions for Visit North Carolina, with placements in several high-profile regional publications. Top-performing 2018 publications included *Garden & Gun*, *Outside Magazine* and *Southern Living*. The campaign also delivered several local market ads within publications such as *Atlanta Magazine*, *The Washington Post Magazine*, *Nashville Lifestyles Magazine* and *Philadelphia Magazine*.

Broadcast / Streaming TV

Television, streaming video and a presence in select movie theaters helped launch Visit North Carolina's new Firsts That Last campaign in Atlanta, Washington, D.C. and Nashville. Streaming video in Philadelphia, Orlando and Columbus, OH also showcased Firsts That Last. Collectively, these efforts delivered 57.1 million impressions to increase awareness and interest in visiting the state.

Digital

Digital advertising continues to play a key role in all parts of the travel planning and decision-making funnel, and Visit North Carolina's digital media plan reflects that across awareness, site traffic and downstream conversion-driving tactics. In 2018, digital advertising across platforms drove 3,072,173 sessions on VisitNC.com, and contributed to a paid media Arrival Lift of 34.9 percent. In addition to constant optimizations across vendors and tactics, 2018 saw several key advancements in digital media:

- Paid Social: continued to focus on paid social across Facebook and Instagram as primary channels where travelers are engaging and seeking inspiration, utilizing image-first static and story units primarily to drive traffic to VisitNC.com, resulting in more than 1.5 million sessions, 110 percent growth as a traffic source vs. 2017 and representing nearly 25 percent of site sessions.
- Display and Native: refined display and native vendor resources to efficiently reach in-market travelers via programmatic advertising (focused on identifying them by behavior, with vendors like Sojern, Adara and Quantcast) and endemic advertising (including the TripAdvisor Premium Destination Partnership and competitive conquering on that platform, as well as a high impact Firsts That Last takeover on USA Today.com's travel section).
- Video: introduced into Visit NC's marketing program in six target markets as part of the Firsts That Last launch, video advertising drove 5,719,897 impressions, with tactics including non-skippable ad formats in streaming video and short skippable videos run through paid social.
- Paid Search: seasonal optimizations and continual adaptations to Google algorithms generated continued success in lower-funnel paid search activity, generating more than 8 million impressions, a very effective 9.61 percent click-through rate and 776,600 clicks at \$0.50 cost per click.

Cooperative Programs

Visit North Carolina negotiated favorable rates with leading travel, lifestyle and special interest publications to provide partners with cost-effective opportunities to broaden the reach of their own advertising efforts. In total, 40 partners were showcased in magazine insertions in:

- *Atlanta Magazine*
- *Blue Ridge Country*
- *Charlotte Magazine*
- *Cleveland Magazine*
- *Coastal Living*
- *Coastal Virginia Magazine*
- *Columbia Metropolitan Magazine*
- *Columbus Monthly*
- *Country Living*
- *Family Fun*
- *Garden & Gun*
- *Good Housekeeping*
- *Jacksonville Magazine*
- *Manhattan Magazine*
- *Modern Luxury Chicago*
- *Modern Luxury Dallas*
- *Modern Luxury Miami*
- *Modern Luxury Washington, D.C.*
- *Nashville Lifestyles Magazine*
- *Orlando Magazine*
- *Our State*
- *Outside Magazine*
- *Oxford American*
- *Parents*
- *Philadelphia Magazine*
- *Pittsburgh Magazine*
- *Richmond Magazine*
- *South Carolina Living*
- *Southern Living*
- *Tampa Magazine*
- *The Roanoker*
- *The TOWN*
- *The Washington Post Magazine*
- *Walter Magazine*
- *Woman's Day*

North Carolina Ski Areas Association

Visit North Carolina continued its partnership with the North Carolina Ski Areas Association on a cooperative marketing campaign promoting GoSkiNC.com, running December 2017 - February 2018. The campaign shifted to a very cost-effective and efficient digital approach including paid search, paid social and native advertising in the Association's priority states of origin including NC, TN, KY, SC, GA, FL, AL, MS, LA and TX. The campaign yielded 114 percent more impressions and 60 percent more website clicks than projected, delivering more than 21.4 million total impressions and 180,733 clicks to GoSkiNC.com.

VisitNC.com

Overview

As the state's official travel website, VisitNC.com hosted 6,619,155 user sessions in 2018, a 9.1 percent decrease from 2017. With the launch of the new 'mobile first' VisitNC.com in spring 2018, the need to rebuild organic traffic and regain traction with search engines was expected to take some time. The impact of paused paid media due to Hurricane Florence also influenced site visits. However, organic traffic began to strengthen again in late fall and momentum continued through the end of the year. As a result, VisitNC.com generated a total of more than 5.6 million key performance indicator actions reflecting interest in travel (detailed below).

VisitNC.com 2018 Key Performance Indicators

- 93,623 site visitors participating in **sweepstakes**
- 44,752 **Travel Guides** ordered from website
- 14,363 downloads or views of **virtual brochures**
- 3,610,830 views of **story pages***
- 23,241 new subscriptions to **e-newsletters**
- 168,716 site **searches** performed
- 12,106 clicks to view online **travel publications**
- 1,485,170 **clicks to partner websites**
- 29,827 clicks to view **travel deals**
- 85,226 on-site **video views**
- 96,975 mobile **phone calls**

*Concurrent with the site relaunch, the metric of content page views was expanded beyond only trip ideas to also include click throughs to listicles, new Firsts That Last content and feature articles, all of which are crafted to inspire interest and travel. As a result, story page views increased significantly in 2018.

Virtual Brochures

84 virtual brochures

14,363 downloads or views

Featured Event Listings

54 participating partners

147 total featured events

176,267 views of featured events

46,769 clicks to partner sites

Sweepstakes

12 participating partners/10 sweepstakes

65,124 total entries

Most Popular Homepage Sweepstakes

1. Brevard's Family Waterfall Adventure Sweepstakes (9,776 entries)
2. 2018 Travel Guide Sweepstakes (8,775 entries)
3. Cast Away on New Adventures in Wilmington & Island Beaches (8,531 entries)

Family of Sites

Media.VisitNC.com

6,237 visits in 2018

3.90 average page views per visit

3:06 average visit duration

SportsNC.com

13,364 visits in 2018

1.74 average page views per visit

0:59 average visit duration

NCFilm.com

47,439 visits in 2018

2.35 average page views per visit

1:31 average visit duration

Database and Web Management

- Working in collaboration with hundreds of partners statewide, provided timely maintenance and technical support for VisitNC.com's Extranet database of more than 12,000 lodging, attraction, event and dining listings.
- Created and distributed a consistent program of e-newsletters, advisories and informational mailings.
- Incorporated more social networking efforts into the ongoing marketing program including Pinterest, Instagram and continued promotion of Project 543.

Public Relations

In 2018, Visit North Carolina hosted 39 journalists from around the world and worked closely with other travel writers to produce content about travel to North Carolina. Earned media activities sparked

hundreds of articles, blog posts and broadcast placements about North Carolina's travel experiences, generating more than 4.2 billion consumer impressions domestically and internationally.

Media visits resulted in coverage of more than 30 counties. Seventeen of those counties were classified as Tier 1 or Tier 2. Six additional Tier 1 and Tier 2 counties received media coverage as a result pitches, news releases and other activities.

Other Highlights

U.S. Media Missions

The 2018 program year included strategic domestic media missions in New York, Washington, D.C., and Raleigh, resulting in engagement with more than 120 editorial representatives. The events attracted such top tier national and regional outlets as CNN Travel, The Wall Street Journal, The Washington Post, Fodor's Travel, Travel + Leisure, Saveur, Food Network Magazine, Conde Nast Traveler, Parents and Family Circle. Thirty-nine North Carolina counties, including 25 rated Tier 1 and Tier 2, were represented at one or more media mission.

Blackbeard

The Public Relations team capitalized on opportunities associated with the 300th anniversary of Blackbeard's death at Ocracoke by organizing a familiarization tour, proactively pitching coverage, and creating an online media kit with fact sheets and travel information. Five journalists from the United States, Canada, Switzerland and the United Kingdom participated in the media trip, which explored sites in Hyde, Beaufort, Carteret and Pitt counties. Their coverage, published by forbes.com, the Toronto Sun and sister publications across Canada, familytraveller.com, ArtundReise and metro.co.uk contributed to the 77.9 million impressions generated by overall public relations activity.

North Carolina Beer Month

North Carolina's craft beer community continues to be a booming industry with more breweries to experience than ever before. Building off of the success of previous North Carolina Beer Months in partnership with the Craft Brewers Guild, Visit North Carolina seized the opportunity and momentum by partnering with more than 100 breweries and creating more unique craft beer events for travelers to the state for the 2018 North Carolina Beer Month.

This popular Visit North Carolina earned-media lead promotion continued the "Pint Hound Brewery Challenge" Passport created back in 2015, but took advantage of an opportunity to partner with in-state craft beer app team Untappd to facilitate the program. Partnering with Untappd allowed users to unlock entries into the sweepstakes based on visitation and/or trial of any nc-brewed beers. This year's passport program yielded approximately 13,000 entries for prize packages including beer-themed experience trips to Asheville, Brevard, Durham and the Outer Banks.

Partnerships, events and offerings such as these led to recognizable results, including:

NCBeerMonth.com Performance Summary:

- 22,761 visits between March and April
- 5,771 downstream clicks

Untappd Results:

- Approximately 300,000 NC Beer Month badge unlocks across 5 badges

eNews Engagement:

- Distributed five NC Beer Month e-newsletters to the NC Beer Month list once every two weeks during the 2018 campaign
 - Subscriber list grew by 21.96 percent from the first e-newsletter to the last e-newsletter
 - Average open rate was 31 percent and average click rate was 5.14 percent

In-State Marketing Initiatives

While out-of-state visitors tend to stay longer and spend more when visiting the state, North Carolinians are also a point of focus within Visit North Carolina's program. Residents typically comprise approximately one-third of annual visitation, and partnerships with the North Carolina Association of Broadcasters, the North Carolina Press Foundation and UNC-TV remain key to Visit North Carolina'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 42,789 spots representing a value of \$3,050,282.

North Carolina Press Foundation

Two hundred one papers published 2,101 ads representing a value of \$1,071,500.

UNC-TV

UNC-TV's award-winning team produced 52 weekly episodes of its popular show *North Carolina Weekend* during 2018. Each episode was broadcast statewide multiple times each week on three of UNC-TV's program services: UNC-TV, The Explorer Channel and the North Carolina Channel. The series annually features more than 200 destinations, attractions and events across the state.

Visitor Services

North Carolina's nine Welcome Centers hosted **8,307,495** visitors in 2018. A breakout of the number of visitors by Welcome Center location is below:

2018 Welcome Center Estimated Visitors	
I-95 S	1,077,268
I-95 N	1,537,898
I-85 S	1,322,090
I-85 N	540,718
I-77 S	323,847
I-77 N	1,012,830
I-40 W	919,073
I-26 W	295,610
I-26 E	1,278,161
Total:	8,307,495

The I-95 North Welcome Center was the most visited in 2018, hosting 1,537,898 travelers. Welcome Centers registered about 7,000 visitors from other countries, including 5,000 from Canada and representing six of seven continents.

In 2018, Welcome Centers booked approximately 17,360 room nights, representing total revenue of nearly \$2.253 million at an average rate of \$129.83 per room night.

Inquiry/Call Center

In 2018, Visit North Carolina received roughly 5.72 million inquiries and mailed 190,486 *NC Travel Guides* to potential visitors.

2018 Inquiries

Total Inquiries	5,664,829
Reader Service	38,918
1-800-VisitNC Calls	19,229
Total	5,722,976

Publications

The Official 2019 North Carolina Travel Guide

The result of work throughout 2018, Visit North Carolina worked with Meredith Travel Marketing to produce the Official 2019 North Carolina Travel Guide by mid-December 2018. The Official Travel Guide serves as Visit North Carolina’s primary fulfillment piece for potential visitors to and within the state. The Official North Carolina Travel Guide used three different covers to reflect the diverse natural beauty found in the state’s mountain, Piedmont and coastal regions.

The mountain cover features waterfall rappelling near Saluda. For the Piedmont, the cover highlights relaxing with unique craft cocktails in Raleigh. The coastal cover captures the Wright Brothers’ experience via a hang-gliding replica in Nags Head. Each cover of the 2019 Travel Guide represented a sweepstakes offering a weekend getaway as the prize. Included inside the 176-page guide are listings for 875 attractions, 2,750 accommodations and campgrounds, plus curated content with vibrant photos and text blocks that provide travel inspiration and information for every county. Travel planners can find further assistance from the two-page map with major roads, bodies of water, parks, cities and towns.

The 2019 Travel Guide, the official guide for North Carolina’s state tourism office, was produced by Meredith Travel Marketing. It was financed by private industry support with more than \$750,000 in advertising which helped produce 500,000 printed copies and digital editions. Listings for the attractions, accommodations and campgrounds were provided for free. The self-mailer format for printed copies reinforces the green initiatives of Visit North Carolina, which is part of the Economic Development Partnership of North Carolina.

NewsLink

Emailed weekly to nearly 4,900 subscribers, *NewsLink* is an electronic publication designed to provide information to the tourism industry. The mailing list also included legislators, economic developers and media. In 2018, *NewsLink* covered 666 stories within the 51 weekly and 1 “Special Edition” issue, 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 e-newsletter and it is available to anyone with a valid email address. It is only sent to those who have requested to receive the newsletter.

Domestic Marketing

American Bus Association (ABA) Marketplace, January 2018, Charlotte, NC

ABA Marketplace is one of the premier industry events for the group travel industry, allowing Buyers and Sellers to meet face-to-face in prescheduled appointments. In addition to the quality appointments, Marketplace offers professional education seminars and numerous networking opportunities. At the 2018 Marketplace, Visit North Carolina:

- Sponsored the marketplace.
- Organized and led 4 pre-familiarization tours and 2 post familiarization tours around the conference.
- In total 83 tour operators from 45 different organizations participated in the familiarization tours visiting 23 counties, 49 attractions, 24 restaurants and 10 hotels.
- Conducted 40 appointments with tour operators during the week, promoting group travel throughout the state.

Travel South Showcase, March 2018, Biloxi, MS

This showcase is a regional appointment-style marketplace focused on increasing travel to and within the Southern states. The showcase offers the most targeted opportunity for tour operators / wholesalers and travel service providers to meet face-to-face with Southern travel suppliers. Visit North Carolina utilized showcase opportunities to:

- Team with 19 travel industry partners and conduct strategic, business development meetings.
- Met with 24 domestic tour operators, focusing on what's new with the state's tourism products and on North Carolina's position as a travel destination market leader.

2018 Annual Blue Ridge Parkway Familiarization Tour

In April, Visit North Carolina partnered with Virginia and Tennessee in hosting a seven-day tour of the Blue Ridge Parkway with 25 AAA representatives from across the United States. Several days were spent with group in all areas of North Carolina's mountain region.

Student and Youth Travel Association, August 2018, Baltimore, MD

Visit NC attended the SYTA Annual Conference, the premier event for the student and youth travel industry. The SYTA Conference is the only conference and showcase dedicated to the student and youth market in North America. Visit NC conducted 28 one-on-one meetings with student and youth travel buyers promoting NC as a destination.

Sports

Connect Marketplace, August 2018, Salt Lake City, UT

Visit NC partnered with NCSA to sponsor the Connect Sports Marketplace. This annual trade show brings together rights holders and sports planners from across the U.S. North Carolina showcased our facilities and sports organizations through pre-scheduled appointments and networking functions. Nineteen in-state tourism partners attended the marketplace to learn more about sports marketing trends and meet with sports rights holders.

TEAMS Conference, October 2018, Louisville, KY

Visit NC and NCSA sponsored the annual TEAMS (Travel, Events And Management in Sports) Conference & Expo in Louisville, KY, Oct. 1-4. The SportsNC team, which consisted of 17 partners from destinations across the state, participated in pre-scheduled appointments during the conference. 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.

Mountains to Coast Ride

Visit NC partners with North Carolina Amateur Sports, Capitol Broadcasting Company and the N.C. Department of Transportation each year to host one of the largest and most successful cross-state bicycle tour events in the United States, Cycle N.C.'s Mountains to Coast Ride. Cycle North Carolina is a week-long bicycle tour across North Carolina that was created to promote North Carolina's scenic beauty, heritage tourism, visitor attractions, historic sites, state parks and healthy lifestyles.

During the past 20 years Cycle NC has stopped overnight in more than 100 North Carolina towns and visited more than 700 North Carolina communities. Each overnight stop by Cycle NC generates some of the largest sales days of the year for restaurants, hotels, visitor attractions and other businesses. Cycle NC events generate millions of dollars in economic impact each year for numerous small North Carolina towns as the event travels the secondary roads exploring our great state.

- September 30 – October 6, overnight stops in Black Mountain, Morganton, Mooresville, Archdale, Southern Pines, Dunn, Elizabethtown, Oak Island
- Participation: 982 cyclists
- U.S. States Represented: 36 (plus D.C., Canada and England)
- Average Age: 60
- Oldest Rider: 85
- Youngest Rider: 9
- Male/Female Ratio: 71 percent / 29 percent

2018 Cycle NC Excursions

For the third year the two partnered together to offer day Cycle NC/Visit NC Excursions for the Mountains to the Coast Ride. These excursions give participants and their families the opportunity to take a break from the ride and experience the state, while expanding the economic impact of the MTC ride. Daily excursions visited 13 different counties, and each day brought positive feedback from the participants on their experiences.

International Marketing

Canada

Market Highlights:

- Multiple daily non-stop flights to Charlotte Douglas and Raleigh-Durham airports.
- No. 1 international market with 400,800 overnight visitors due to ease of access via highways and direct air service. The majority of overnight visitors came from the province of Ontario followed by those from Quebec.
- These visitors spent \$232 million.

Cooperative Marketing & Advertising Opportunities

Visit NC teamed with Brand USA, the nation's official tourism office, in a spring multichannel initiative. The campaign included a one-page ad circulated through several major publications in Canada (digital and print), social amplification via Brand USA's social channels, co-branding through Expedia's Discover America landing page and guaranteed clicks through Google display network.

Results:

- Total impressions: 2.6 million.. Bookings on Expedia in Canada during the campaign.
- 2135 room nights, \$299,369 in revenue
- 1087 flights, \$466,135 in revenue

Horizon & Travel Lifestyle Campaign

Horizon Travel and Lifestyle is one of the leading travel and lifestyle magazines in North America. The Visit NC team secured a marketing campaign with the publication which included a full-page ad, full page editorial, and complementary five-second commercial spots to run on 10 screens in the Toronto Path System. This resulted in more than three million impressions, digital spots running 11,160 times and an insert in the Toronto Star reaching 250,000 in circulation.

Canada Music Week

In partnership with Red Eye Worldwide, Visit NC was a sponsor at Music Week in Canada. The week-long event highlighted North Carolina artists and the rich history music has played in Americana. It was educational with panel discussions and one-on-one appointments with travel & music media.

Sales Missions and Trade Shows

Visit NC and 6 CVB partners met with more than 50 media members in Toronto & Montreal.

Toronto Outdoor Adventure Show

Visit NC exhibited at the Outdoor Adventure Show in February, reaching more than 26,000 outdoor enthusiasts. Created a social media contest around “my dream adventure,” which generated more than 200 posts and a prize drawing from Outer Banks Visitors Bureau.

Toronto National Women’s Show

Participated in 2018 show and was a great opportunity to engage a targeted audience of female consumers. Attendees were invited to engage with an interactive green screen booth experience complete with iconic North Carolina backgrounds and social media content. We obtained 75 North Carolina opt ins and several trip leads.

Canadian Public Relations Results

- Attended Discover America Day (12 scheduled media appointments) + Travel Media Association of Canada Conference (17 scheduled media appointments).
- 9 journalists hosted
- Placement generated a total reach of 56 million impressions

Overseas Visitors

In 2018, North Carolina attracted 888,600 international visitors who spent an estimated \$1.2 billion in the state. Canada, the U.K. and Germany were the top countries of origin to the state in terms of visitor volume. Other top countries of origin were China, Mexico, India, Japan, France, Brazil and Australia. While visitation to the US was down, NC had an increase of 3.2 percent.

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

Rank	Country of Origin	2018 Est. Visitors	% Change from 2017	2018 Total Spent	% Change from 2017	Avg Spending per Visitor
1	<i>Canada</i>	400,800	+3.7%	\$232m	+1.3%	\$579
2	<i>United Kingdom</i>	77,500	+1.8%	\$134m	+5.1%	\$1,729
3	<i>Germany</i>	51,200	+1.2%	\$76m	+2.3%	\$1,484
4	<i>China</i>	32,400	-10.8%	\$90m	-12.0%	\$2,778
5	<i>Mexico</i>	27,500	+10.1%	\$13m	+5.9%	\$473
6	<i>India</i>	25,400	+2.9%	\$60m	+4.4%	\$2,362

7	<i>Japan</i>	18,800	-7.4%	\$39m	-5.7%	\$2,074
8	<i>France</i>	17,700	+3.1%	\$22m	+1.2%	\$1,243
9	<i>Brazil</i>	15,800	+15.3%	\$37m	+14.8%	\$2,342
10	<i>Australia</i>	14,200	+15.1%	\$28m	+22.3%	\$1,972
11	<i>Spain</i>	10,600	+3.9%	\$11m	+6.5%	\$1,038
12	<i>Italy</i>	10,200	+0.1%	\$14m	-0.4%	\$1,373
13	<i>South Korea</i>	9,800	-10.3%	\$23m	-5.1%	\$2,347
14	<i>Sweden</i>	8,400	-0.4%	\$10m	-1.7%	\$1,190
15	<i>Ireland</i>	7,400	+8.5%	\$10m	+9.3%	\$1,351
Total		888,600	+3.2%	\$1.2b	+2.4%	\$1,350

*Tourism Economics, 2019

U.K. and Ireland

Market Highlights:

The U.K./Ireland is the top overseas market to North Carolina. The state is served directly as follows:

- Two daily non-stop flights to Heathrow.
- Seasonal service to Dublin, Ireland.
- No. 1 overseas market with 84,900 visitors.
- These visitors spent \$144 million.

Sales & Marketing Accomplishments

In partnership with North Carolina based, Yep Roc Records, Visit NC promoted NC Music with a promotion to win a trip to Merlefest. A microsite was promoted with music and tourism info. Promotion ran for two weeks and generated 4,400 entries.

Later in the summer, Visit NC again partnered with Yep Roc Records at the Cambridge Folk Festival in the UK. Visit NC was the first destination sponsor at the event. Over the three-day event NC BBQ and beer were featured. The children's area was visited by Blackbeard the Pirate daily. Rhiannon Giddens, a North Carolina musician, was the guest curator of the festival often mentioning her home state to various audiences. Partners from Cabarrus CVB and Visit Raleigh attended with Visit NC donating daily prizes.

Sales & Marketing Accomplishments

Co-op Marketing was carried out with a number of operators across all distribution channels and included activities with:

- America As You Like It
- Audley Travel
- Bon Voyage
- Platinum Travel
- SAGA Holidays
- Travel 2
- Travel Counselors
- USAirtours

Trade Shows

- Visit North Carolina (U.K. & Ireland) were present at IPW 2018 in Denver, CO.
- Visit North Carolina joined other Travel South USA states exhibiting at WTM London.
- North Carolina was present at the Visit USA UNITE Tour Operator day where 15 one-to-one meetings with product managers occurred.
- The U.K. & Ireland office attended the 365 Conference, a great opportunity for them to meet and network with the team from various areas of the state, pickup new information and make new contacts.

Consumer Shows

- Visit North Carolina participated in the Visit USA Pavilion at the Destinations Consumer shows in Manchester and London, these being held in the key planning months of January and February.
- Visit North Carolina participated at the Holiday World Consumer Show in Dublin, Ireland, held in January 2018.

Sales Missions

Prior to the Cambridge Folk Festival representatives from Visit NC, Charlotte Regional Visitors Authority, Cabarrus CVB and Visit Raleigh held media meetings, trainings and events with key operators in and around London.

Visit USA Associations in the U.K. and in Ireland

- Four quarterly meetings attended for the U.K.
- Four quarterly meetings attend in Ireland.
- Hosted table at the Independence Day Visit USA Ball, the key event in the U.K. calendar for the senior members of the travel industry.
- Training spot on the Visit USA Training Roadshow where 250 agents trained across three cities (Edinburgh, Liverpool & Reading).
- Visit North Carolina attended two key Ireland events for media and tour operators – Irish Travel Industry Awards and TravelMedia USA Summer Evening Event.

Brand USA Multi-Channel Results

Visit NC partnered with Brand USA to leverage awareness in the UK market with their Multi-Channel Campaign. Through print and digital channels North Carolina was featured for six weeks. Results during that time were three million impressions, 1,503 room nights booked, and 202 flights generating \$181,000.

U.K. Public Relations Results:

- Individual media familiarization tours took place focusing on the various areas and activities of the state and included a mix of activities and interests.
 - Visit North Carolina hosted ten journalists on press trips over the course of 2018.
 - 123 placements with a total reach of more than 88 million impressions.
- Coverage was across all media channels including trade and consumer publications, online outlets and radio.
- U.K. & Ireland coverage was statewide from Asheville through to the coast.
- Visit North Carolina was represented at key media events during the year, including Visit USA Meet the Media, TravMedia & British Guild of Travel Writers events.

Germany

Market Highlights:

- No. 2 overseas market with 51,200 visitors to North Carolina
- Visitors spent \$76 million
- Supporting three daily non-stop flights from Munich and Frankfurt to the state

Sales and Marketing Accomplishments

Visit North Carolina conducted cooperative marketing with different tour operators, consumer campaigns, as well as trainings and sales calls throughout Germany and Switzerland.

Roadshows

On behalf of Visit North Carolina we participated in Visit USA roadshows in Germany, Switzerland and Austria training more than 250 travel agents in total on North Carolina.

Blackbeard Campaign

Visit North Carolina teamed with men's grooming company, Blackbeard, to introduce North Carolina to all of Blackbeard's customers. A microsite, video and social campaign were created that promoted North Carolina as well as their products. The campaign lasted for six weeks. Our tour operator partner, FTI donated the prize trip.

Results:

- 1,929 registered for the raffle
- 2,837 unique visits for the site
- Total reach was 420,000

Sales & Marketing Accomplishments

Co-op Marketing was carried out with a number of operators across all distribution channels and included activities with:

- America Unlimited
- Amerikareisen
- Argus Reisen
- CanUSA
- CRD
- Cruising Reisen
- Explorer Reisen
- FTI
- Fairflight
- Hotelplan
- Knecht Reisen
- USA Reisen

Sales Mission

April 2018 – Accomplished trainings for tour operators and travel agents as well media visits in Berlin and Vienna.

Consumer & Travel Trade Shows

- NC brochure distribution at f.r.e.e Munich, CMT Stuttgart and Reisen Hamburg
- ABF Hanover – daily presentation to consumers on NC

German Public Relations Results

- Organized four individual media FAMs
- Cooperated with travelews.ch on North Carolina online Banners linking to visitnc.com
- 294 placements with a total reach of more than 1.6 billion impressions

Other International News

Travel South USA

Visit North Carolina led a large group of statewide partners to the Travel South International Showcase in Nashville, TN. Nearly 100 international tour operators from 12 countries met with North Carolina CVBs, attractions and hotels to increase interest in international visitation to North Carolina.

Through a partnership with Travel South USA, Visit North Carolina has also been able to cost-effectively secure limited PR and marketing representation in France, Italy, Benelux and China.

With this partnership, NC hosted several media and tour operator fams.

Along with several other Southern States attended a sales mission to Italy and France.

IPW

Visit North Carolina hosted a double North Carolina booth at the U.S. Travel Association's IPW in Denver, CO. Visit Charlotte, Visit Raleigh and the Outer Banks Visitors Bureau joined the state in more than 85 trade and media appointments.

WeChat in China

Visit North Carolina has a weekly post on WeChat in China with more than 29,000 followers.

Brand USA Co-op Marketing Programs

By leveraging our marketing dollars with Brand USA, we have been able to have an impact in several international markets despite our limited funding. We get the power of three times our promotional dollars to increase awareness to potential visitors.

In 2018 we participated in the following programs:

- Inspiration Guide – 575,000 printed USA guides translated into 10 languages for distribution in more than 20 countries.
- Multichannel Campaigns in U.K. and Canada – aimed at both print and digital mediums with online booking included.

Tourism Development

The Tourism Development Manager continued to be involved in various initiatives to preserve and promote the various genres of traditional and heritage music across the state. Small towns are an important part of the North Carolina landscape.

Visit North Carolina is actively involved in ongoing programming either independently or in conjunction with partners such as the NC Rural Center, 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 North Carolina's Tourism Development team:

- Set goals for the Tourism Development Program and improved the delivery of information for the program on the Department of Commerce website. The effort is designed to make local communities more aware of resources within Visit North Carolina as well as other opportunities for tourism development.
- Gathered information for Visit North Carolina's film office, public relations, domestic marketing and international marketing programs.
- Continued to research available resources in the form of grants, technical assistance and development (state, federal, private philanthropic).
- Made presentations to partners throughout North Carolina on Cultural Heritage Tourism Development and ways to work with Visit North Carolina.
- Represented Visit North Carolina 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 and other products in the regions.

- Continued promotion and expand the NC Certified Retirement Community Program.

Tourism Resource Assistance Center (TRAC)

The Tourism Resource Assistance Center (TRAC) was developed along with the Industry Relations Manager to bring Visit North Carolina’s program managers to local communities to share and discuss the nuts and bolts of partnering effectively with Visit North Carolina.

TRAC sessions through 2017

1. New Bern
2. Lexington
3. Smithfield
4. Bryson City
5. Morganton
6. Jacksonville
7. Edenton
8. Greensboro
9. Outer Banks “Mini TRAC”
10. Fayetteville
11. Wilmington
12. Danbury
13. Pinehurst
14. Yadkinville
15. Warrenton
16. Greenville
17. Blowing Rock
18. Banner Elk/Beech Mountain
19. Dunn
20. Troy
21. Marion
22. Creedmoor
23. Mount Airy
24. Washington

2018

25. Mars Hill
26. Maggie Valley
27. Reidsville
28. Sanford
29. Roxboro
30. Tarboro

Consumer Show Attendance

Visit NC led groups of in-state partners at five Consumers Shows in 2018:

1. Travel & Adventure Show DC – Partners (Outer Banks Visitors Bureau, Greenville-Pitt County CVB, Pender County Tourism, Pinehurst, Southern Pines and Aberdeen Area CVB, High Point CVB and the Boone and Watauga County TDA)

2. NY Times Travel Show – Partners (Outer Banks Visitors Bureau, Greenville-Pitt County CVB, New Bern-Craven County CVC, Rockingham County Economic Development and Tourism, City of Reidsville, Crystal Coast Lady Cruises/Island Express Ferry)
3. Travel & Adventure Show Philadelphia – Partners (Outer Banks Visitors Bureau, New Bern-Craven County CVC, High Point CVB, Boone and Watauga County TDA, Yadkin County TDA, Greenville-Pitt County CVB, Johnston County Visitors Bureau)

Community Partnerships and Heritage Development

Visit North Carolina also continued to be actively engaged in the development of outdoor recreational/ecotourism/agritourism/heritage opportunities in the regions across the state. Farms, waterways, hiking and biking trails, greenways and open spaces are important features in a community that improve and promote quality of life and link people with their natural and cultural heritage. These partnerships include assistance in researching resources for communities, working with communities interested in Tourism Development Authority development, marketing initiatives, heritage trails development and product development plans.

Blue Ridge National Heritage Area (BRNHA)

Created by congressional legislation, the BRNHA is supported through a partnership with Visit North Carolina to assist in coordinating planning for the 25 counties in the designated region. Visit North Carolina continued to assist in the implementation of the 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 North Carolina 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.

Appalachian Regional Commission (ARC)

Visit North Carolina also continued efforts with the Appalachian Regional Commission Tourism Council in developing and promoting the culinary guide “Bon Appetit Appalachia” of restaurants, agritourism farms, farm-to-table restaurants, microbreweries and distilleries within the region.

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 North Carolina continued to partner with the North Carolina Department of Transportation and North Carolina 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” 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 mapguides via mail through the Call Center as well as in the (9) 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 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 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, 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.

Certified Retirement Community Program

The North Carolina Department of Commerce operates a community development program for communities that are positioning for retiree attraction as an economic and community development strategy. The N.C. General Assembly, during the 2008 short session, recognized the inherent panoply of quality living 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 North Carolina will help market and promote the community.

- Visit North Carolina worked with the Community Assistance office to administer and review applications.
- Visit North Carolina’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 North Carolina continued to attend conferences on trends, research and developing retirement communities, and serves on the Board of Directors for the American Association of Retirement Communities (AARC).

Visit North Carolina continued to promote certified communities and areas of North Carolina during the Ideal Living Regional Expos in Long Island, NY; Bridgewater, NJ; Greenwich, CT and (2) Washington, D.C.

Results:

- 6,000 leads generated
- 1,025 packets downloads from retirenc.com

- 104 packets mailed through the Call Center
- 1,776 moves to NC from Dec. 2018 – (128 in 14 CRC counties w/in the Retire NC counties)
- 372 moves through August 2018 (200 are out of state moves; 172 NC-NC moves)

Visit North Carolina’s certified communities include:

1. Lumberton (pilot program)
2. Asheboro
3. Marion
4. Sanford
5. Pittsboro
6. Mt. Airy
7. Eden
8. Edenton
9. Tarboro
10. Winterville
11. New Bern
12. Lenoir
13. Laurinburg
14. Reidsville
15. Jamestown/High Point
16. Washington

2018 CRC additions

17. Roanoke Rapids
18. Elizabeth City

Industry Relations

Visit NC 365 in Winston-Salem (March 4-6, 2018)

Visit North Carolina’s annual conference for the state’s travel and hospitality industry was held at the Benton Convention Center in Winston-Salem and featured dynamic educational programming and valuable networking opportunities. The 2018 Winner’s Circle Awards were also presented and recognized distinguished North Carolinians for their contributions to the growth and success of the state’s tourism industry. Honorees for 2018 included Chuck Hobgood, Dana Clark, Harris Prevost and Tanya Jones.

Tourism Week in Raleigh (May 7-13, 2018)

Gov. Cooper proclaimed during North Carolina Tourism Week the travel industry had a record impact on the state’s economy in 2017, with \$23.9 billion in direct visitor spending generating more than 225,000 tourism employment jobs. In addition, state tax receipts as a result of visitor spending rose to more than \$1.2 billion.

Visit North Carolina joined the N.C. Travel & Tourism Coalition, the N.C. Travel Industry Association, and other industry partners in Raleigh to emphasize the economic benefits of tourism throughout the week-long meeting with legislative representatives and hosting a legislative reception at the NC Museum of Natural Sciences. North Carolina's nine Welcome Centers hosted their own events during the week to thank travelers to the state.

Regional Mid-Year Listening Tours (September and October 2018)

Visit North Carolina went on the road again to all regions of the state for its Mid-Year Listening Tours, offering several forums to make it easier for industry partners to participate and contribute to Visit North Carolina's planning efforts. The Listening Tours (formerly Mid-Year Marketing Updates) bring together leaders from all sectors of North Carolina's travel industry to highlight recent performance trends, provide updates on Visit North Carolina's current marketing programs and co-op initiatives, and gain insight from partners to help fuel Visit North Carolina's strategic planning for the following year.

Sports Development

Visit North Carolina continued to enhance the SportsNC.com website, promoting North Carolina's appeal as an attractive destination for sporting events of all kinds and providing sports-event rights holders and planners an easy connection to North Carolina Sports Association's (NCSA) 39-member destinations and organizations.

As a presenting sponsor, SportsNC coordinated and led a cooperative effort with sports sales directors and managers from North Carolina communities to market the state as a premier sporting event destination at Travel, Events and Management in Sports (TEAMS) Annual Conference and Connect Sports Marketplace. Efforts also included providing contact information for sports organizations, motorsports teams and professional sports teams in North Carolina, and attending quarterly NCSA quarterly meetings, giving updates on Visit North Carolina activities.

North Carolina Film Office (FilmNC)

The North Carolina Film Office (FilmNC) and regional film commissions promoted filmmaking in North Carolina at the newly revamped Association of Film Commissioners International's (AFCI) AFCI Week and made several sales calls to the West Coast. In 2018, FilmNC was once again promoting the state at the annual Sundance Film Festival in Park City, Utah.

Locally, FilmNC sponsored and hosted events at the Cucalorus Film Festival (Wilmington) and RiverRun International Film Festival (Winston-Salem), while continuing to use various online and social platforms to promote more than 30 film festivals held across the state. Additionally, the state film office also continued its work in helping to support local filmmakers by serving as the primary sponsor of the "Filmed In NC" filmmakers fund, given out to indigenous North Carolina filmmakers by the Cucalorus Foundation to help highlight their works on a national and international stage.

FilmNC also partnered with NC-based Krispy Kreme to get the attention of film industry decision-makers with a unique package communicating the benefits of filming in NC, as well as a taste of some of the best NC has to offer by way of Krispy Kreme. FilmNC distributed nearly 350 dozen doughnuts to 43 different Los-Angeles based production companies which included the newly-designed FilmNC Pitch Book communicating the 25 percent rebate and other film incentive package details.

Finally, 2018 also saw the theatrical runs of the highly anticipated NC-filmed feature films “Three Billboards Outside Ebbing, Missouri” and “American Animals.” With regards to Three Billboards... both the NC Film Office and VisitNC began promoting the state as the film’s home when the feature made its North American debut at the Toronto International Film Festival in Fall 2017 and continued to promote the state’s tie-in with the feature well into 2018 to both the film and entertainment industry as well as to potential visitors looking to see where the feature film was made, including developing a travel itinerary highlighting both filming locations used as well as local businesses visited by the production team.

2018 Total Production Estimates & Highlights from N.C. Film Office:

- 77 projects
- \$54,920,340 direct spend by productions
- 969 production days
- 4,131 jobs created
 - 1,442 crew, 474 talent, 2,215 extras

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

Highlights of film projects during 2018 include:

- *Words On Bathroom Walls* – Wilmington Region (grant recipient)
- *Wicked Tuna: Outer Banks (Season 5)* – North Eastern Region
- *A Chef’s Life (Season 5)* – Eastern Region
- *My Big Fat Fabulous Life (Season 6)* – Piedmont Triad Region
- *Love It or List It (Season 14, 3rd in NC)*– Research Triangle Region
- *Toymakerz (Season 3)* – Piedmont Triad Region
- *Swamp Thing (Pilot)* - Wilmington Region (grant recipient)
- *Reprisal (Pilot)* - Wilmington Region (grant recipient)

FIRSTS THAT LAST and the NC ‘brush stroke’ design are service marks of the EDPNC.

###