



2015 Annual Report

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

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

Table of Contents

NC Travel and Tourism Board	3
EDPNC Introduction	5
2015: The Year in Review	5
2015 Results	7
Visit North Carolina Budget Overview	10
NC Visitor Services Budget Overview	10
Projected State Tourism Office Budgets	11
Advertising	12
VisitNC.com	14
Public Relations	17
In-State Marketing Initiatives	19
Visitor Services	20
Publications	21
Domestic Marketing	22
International Marketing	23
Tourism Development	28
Industry Relations	32
North Carolina Film Office	33

2015 NC Travel and Tourism Board

Listed here is the Board for the year 2015 as required for the 2015 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: DMANC

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

Sabrina Bengel
Craven County TDA
Appointed By: Governor

Rolf Blizzard
Turnpike Properties
Appointed By: NC Travel & Tourism Coalition

Donna Carpenter
Cabarrus CVB
Appointed By: DMANC

Robert "Randy" Cobb
Abercrombie Oil Co., Inc.
Appointed By: NC Petroleum Marketers Assn.

Robert Danos
NC Youth Camp Association
Appointed By: Senate President Pro Tempore

S. Lewis Ebert
NC Chamber
Appointed By: NC Chamber

Denny Edwards
Greater Raleigh CVB
Appointed By: DMANC

Joel Griffin
Griffin Stafford Hospitality, LLC
Appointed By: NCRLA

Sen. Ralph Hise
North Carolina Senate
Appointed By: Senate President Pro Tempore

Katherine Hopkins
North Carolina Watermen United
Appointed By: NCWU

Chris Humphrey
Allstate Insurance / ERA Humphrey Realty Group
Appointed By: Senate President Pro Tempore

Rep. Charles Jeter
NC House of Representatives
Appointed by: House Speaker

Rep. Patricia McElraft
North Carolina House of Representatives
Appointed By: House Speaker

Caleb Miles
Pinehurst, Southern Pines, Aberdeen Area CVB
Appointed By: NCTIA

Lynn Minges
NC Restaurant and Lodging Association
Appointed By: NCRLA

Robert M. O'Halloran
East Carolina University
Appointed By: NCRLA

Tammy O'Kelley, Chairman
Randolph County TDA
Appointed By: House Speaker

Vinay Patel
SREE Hotels, Inc.
Appointed By: Governor

Jessica I. Roberts
Greater Mt. Airy Chamber of Commerce
Appointed By: House Speaker

Norman Sanderson
North Carolina Senate
Appointed By: Senate President Pro Tempore

Arthur Schools Jr.
Former Mayor of Emerald Isle
Appointed By: Governor

Secretary John E. Skvarla III
NC Department of Commerce
Appointed by: NC Department of Commerce

Kathy Sparrow
North Carolina Watermen United
Appointed By: NCWU

Wit Tuttell (non-voting member)
Visit North Carolina, EDPNC
Appointed By: NC Dept. of Commerce

Chris Valauri
The Valauri Group, LLC
Appointed By: House Speaker

Paula Wilber
The Biltmore Company
Appointed By: NCRLA

Lynn Wingate
Washington TDA
Appointed By: NCTIA

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 consolidate and enhance North Carolina's marketing and recruitment functions, previously conducted by the North Carolina Department of Commerce. The partnership serves to oversee efforts in economic development, international trade, and tourism, film and sports development. Due to this transition, the Department of Commerce's Division of Tourism will henceforth be referred to as "Visit North Carolina."

2015: The Year in Review

North Carolina's tourism industry achieved record performance in 2015, with estimated visitor spending increasing in 91 of the state's 100 counties and resulting in an all-time high of \$21.96 billion in direct spending, a 3.0 percent increase over 2014 which outpaced the national average for growth in 2015 of only 2.1 percent. Spending by travelers directly supported more than 211,000 jobs for North Carolinians, setting yet another record. Additionally, payroll income increased 7.1 percent to top \$5 billion for the first time. Visitor spending generated roughly \$1.79 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 2015

Employment generated by domestic and international travelers in North Carolina increased 3.2 percent in 2015. These travel-related jobs composed 5.2 percent of total non-agricultural employment in North Carolina during 2015.

Source: U.S. Travel Association

On an average day in 2015, visitors in North Carolina spent more than \$60 million and contributed about \$4.9 million in state and local taxes.

Source: U.S. Travel Association

Visit North Carolina operated on the state's brand promise of *Inspiring More*. With its vast, pristine beaches, relaxing mountains, vibrant cities, amazing culture and hundreds of fun-filled excursions, North Carolina is that state that inspires its visitors to see, experience, engage and connect more. Visit North Carolina continued to bring to life this positioning strategy through advertising, public relations, digital messaging and more.

VisitNC.com ended 2015 with a record 6.1 million user sessions, a 14.61 percent increase from 2014. These sessions drove a record 1.97 million downstream referrals to North Carolina industry partner websites, and the site generated a total of 3.7 million key performance indicator actions.

Social media continued its growth in 2015, with followers across Visit NC Facebook, Twitter, Instagram, Pinterest and YouTube channels reaching 184,992, a 55 percent growth year-over-year. Instagram was the fastest growing channel, growing at an average monthly rate of 12 percent. Owned content across platforms generated 801,381 total engagements and more than

252 million potential impressions. There were 43,379 #visitnc mentions across Twitter and Instagram. Social traffic to VisitNC.com increased by 148 percent, with 136,324 referrals.

Visit North Carolina cost-effectively enhanced its efforts to reach travelers increasingly planning travel online by shifting more of its investment to digital advertising, including a strategically selected mix of publishers and networks to drive brand awareness, site traffic and conversions for downstream referrals.

Proactive public relations efforts expanded Visit North Carolina's outreach to key audiences with a program that reached more than 1.2 billion consumer impressions across the United States and 784 million internationally.

Cooperative marketing programs with NC travel industry partners and effective partnerships with in-state media associations resulted in an estimated \$6 million in incremental direct investment, in-kind support and brand exposure for North Carolina and VisitNC.com within and outside the state.

The North Carolina Film Office continued to attract productions to film in the state. 2015 saw the end of the refundable tax credit and the start of the new Film and Entertainment Grant, which had a one-time allocation of \$10 million. N.C. Department of Revenue reported that as of April 2016, 5 film projects had filed tax paperwork with the agency that totaled \$96,344,090 in direct spending while employing 3,627 people. Among the many 2015 highlights were the filming of *Wicked Tuna: Outer Banks*, season three of *Under the Dome*, seasons two and three of *A Chef's Life*, season two of *My Big Fat Fabulous Life*, a continued first season of *Love It or List It*, the pilot episode of *Good Behavior*, *The Legacy of a Whitetail Deer Hunter*, and national commercials for Oscar Meyer, Golden Corral, Goodyear, Nationwide and Mountain Dew.

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.

Please review the balance of this Annual Report for more details on Visit North Carolina's 2015 program of work and accomplishments. Visit North Carolina remains committed to its collaboration with partners statewide to ensure North Carolina's continued growth and success as a preferred travel, film and sports destination and positive economic force for the entire state.

2015 Results

Visitor Spending

In 2015, it is estimated that visitors to North Carolina spent a record \$21.96 billion in the state, an increase of 3.0 percent from 2014.

Domestic visitor spending directly supported 211,490 jobs for North Carolina residents and the tourism industry directly contributed \$5.3 billion to the state's payroll in 2015.

Traveler spending generated some \$3.4 billion in federal, state and local tax receipts, an increase of 6.3 percent from 2014.

Ninety-one of North Carolina's 100 counties experienced growth in visitor spending in 2015.

Mecklenburg County received \$5 billion in domestic travelers' expenditures, the highest in the state. Wake County ranked second with \$2.1 billion, followed by Guilford County with \$1.3 billion and Dare with \$1.1 billion. Buncombe County, for the first time, topped \$1 billion in visitor spending.

Polk and Cherokee counties had the largest percentage increases at 11.8 percent and 7.8 percent. Vance and Henderson counties followed with a 4.7 percent increase each, followed by Union with a 4.6 percent increase, then Montgomery, Catawba and Cleveland counties with a 4.5 percent increase each. Rounding out the top 10 in largest increases were Richmond and Pasquotank counties (+4.4 percent each).

Positive spending growth was seen throughout the state's economic development regions. The Western (+3.9 percent) and North Central (+3.3 percent) regions experienced the strongest growth, yet all eight regions had spending growth of 2 percent or more.

Mecklenburg County directly employed the most tourism employees with nearly 50,000 and had the largest payroll at \$1.7 billion. Wake (21,897), Guilford (13,127), Dare (12,711) and Buncombe (10,637) counties each had more than 10,000 direct tourism employees.

Ninety-two percent of the state's counties saw direct tourism employment growth in 2015. Nearly all of the same counties that led growth in visitor spending also had the largest increases in direct tourism employment from 2014 to 2015. They were Polk (+12.1 percent), Cherokee (+7.4 percent), Vance (+5.0 percent), Union (+4.9 percent), Montgomery (+4.8 percent), Richmond (+4.7 percent) and Pasquotank (+4.7 percent) counties.

Source: U.S. Travel Association

2015 Travel Volume

North Carolina person-trip volume was 54.6 million in 2015. North Carolina ranked No. 6 in total domestic person-trip volume.

Source: TNS Travels America

2015 Total State Rankings by Volume

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

Source: TNS Travels America

Average Trip Spending

North Carolina overnight visitor parties spent approximately \$628 per trip in 2015. Out-of-state visitors spent approximately \$765 per trip in 2015, while in-state resident travel parties spent \$404 per trip on average. This represents a 63% 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 \$900 per trip in 2015.

Source: TNS Travels America

Average Overnight Trip Duration

The average length of stay of North Carolina visitors was 2.9 nights in 2015. Resident visitors stayed an average of 2.4 nights, while out-of-state visitors stayed an average of 3.4 nights.

U.S. travelers stayed an average of 3.5 nights per trip in 2015.

Source: TNS Travels America

North Carolina's Top States of Origin for Overnight Visitors

- NC 31.9%
- VA 7.8%
- GA 7.3%
- SC 6.2%
- FL 5.4%
- NY 4.1%
- PA 3.7%
- MD 3.0%
- OH 2.9%
- TN 2.6%

Source: TNS Travels America

NC's Activities for Overnight Visitors

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

Activities involving soft adventure and exploring the state's natural, scenic beauty are shared by the most visitors with 16 percent of visitors reporting that they went to a beach, 15 percent doing rural sightseeing, exploring a state (9 percent) or national (5 percent) park, 7 percent viewing wildlife and 4 percent hiking or backpacking.

The state's natural, historic and cultural assets also were enjoyed by visitors with 11% reporting that they visited a historic site or church, 9 percent visiting museums and 4 percent going to art galleries.

Visitors also participated in traditional activities with 2 percent reporting that they played golf while on vacation and 4 percent reporting that they attended a youth, amateur, collegiate or pro sporting event.

North Carolina's beer and wine industries are a growing area of interest for visitors with 4 percent reporting that they visited a craft brewery and 3 percent visiting one of the state's many wineries.

Source: TNS Travels America

Visit North Carolina Budget Overview

Visit North Carolina, part of the Economic Development Partnership of North Carolina, was funded by appropriations from the General Assembly that were transferred to the EDPNC through a contract with the North Carolina Department of Commerce. Expenditures included:

Media & Marketing	\$5,625,600
Personnel Costs	1,130,945
Rent, Facilities and Computers	119,182
VisitNC.com & Interactive	1,390,200
International (3 direct, 4 joint)	750,137
Film Office Marketing	168,443
Public Relations	409,612
Domestic, Group and Sports	149,863
Industry Relations	64,516
Research	492,742
<hr/>	
Total	\$10,301,240

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	\$2,051,000
Inquiry/Fulfillment	296,630
<hr/>	
Total	\$2,347,630

State Tourism Office Budgets: 2015-16

According to the U.S. Travel Association, North Carolina's budget of approximately \$10 million ranked 32nd in state tourism office budgets in 2015-16, significantly behind several states that are direct competitors.

Budget Rank	State	Estimated 2015-16 Budget	Budget Percent Change
8	Virginia	23,567,934	+25.1
10	Louisiana	21,007,513	+40.5
16	Tennessee	18,568,731	+29.4
18	South Carolina	16,057,718	+25.4
24	Alabama	13,091,351	+9.8
28	Kentucky	11,323,301	-4.5
29	West Virginia	10,645,422	+69.7
32	North Carolina	10,038,956	-0.7
35	Georgia	7,692,269	+14.2
40	Mississippi	6,110,485	-1.4

Facing the challenge of maintaining share of voice in an increasingly competitive marketplace, Visit North Carolina received incremental funding of \$1 million from the General Assembly. The additional investment made possible Visit North Carolina's first television advertising campaign in a decade. Television and online video advertising buys made during spring 2015 were focused on the Atlanta and Washington, D.C. metros, two of the state's most important markets of origin.

Research conducted by Longwoods International following the campaign confirmed significant increases in advertising awareness, and most importantly, a return on investment of \$11 in state and local taxes for every dollar Visit North Carolina invested in paid media within the two target markets. The study revealed the advertising also had a positive impact on North Carolina's image as a travel destination on every image factor.

In addition, Longwoods reported on the positive "halo effect" Visit North Carolina's advertising efforts has on the state's overall economic development image. The study confirmed those exposed to Visit North Carolina's tourism promotion messaging rated the state higher as a place to live, start a career, start a business, attend college, purchase a vacation home and retire.

Advertising

Print

Print advertising garnered more than 16,549,335 impressions for Visit North Carolina, with placements in more than 11 different publications. Top-performing publications included *Coastal Living*; *Country Living*; *Family Fun*; *Garden & Gun*; *Good Housekeeping*; *O, The Oprah Magazine*; *Southern Living* and *Woman's Day*.

Interactive

North Carolina's paid search efforts continued to be effective and efficient throughout 2015. While overall site traffic remains important, Visit NC ultimately wants to deepen user engagement with VisitNC.com and drive specific on-site activities that help to quantify travel intent. Examples of those travel-intent activities include ordering a Travel Guide, signing up for a VisitNC.com e-newsletter, and most importantly, driving downstream (referral) traffic to local partner sites for further travel planning. The campaigns were continuously optimized to improve travel-intent metrics by lowering the cost-per-activity (CPA) to achieve high-level and cost-efficient performance. In 2015, the paid search campaign generated 284,390 clicks to VisitNC.com, 52,316 activities and a \$3.41 cost per activity.

Digital

As consumer behaviors and consumption habits around travel research, planning and booking are constantly expanding and evolving, digital advertising continues to play an ever-increasing role in Visit North Carolina's communication mix.

In 2015, the digital media strategy remained rooted in the following three objective areas and planned against accordingly:

1. Awareness Drivers: To increase exposure of the overall Visit North Carolina identity
2. Site-Traffic Drivers: To drive qualified, cost-efficient traffic to VisitNC.com and enhance site visitation
3. Conversion Drivers: To drive downstream (referral) traffic from VisitNC.com to local partner sites, thus quantifying travel intent

The overall digital planning approach stayed on course, in which each seasonal round was planned and placed as an independent and focused campaign (i.e., winter, spring, summer, fall). Planning seasonally rather than placing one upfront 12-month campaign continued to allow for annual brand presence while providing more frequent checkpoints to: acclimate to seasonalities and ever-changing editorial concentrations; optimize both media vendor and creative mixes; increase and apply campaign-over-campaign learnings and insights; and be more nimble and quick to respond to market and performance changes.

Each seasonal campaign comprised of a blended mix of digital strategies – from native content distribution to performance-driven display – as well as a diverse set of media partners – from targeted reach vehicles to travel-endemic sites. Leading media performers, such as Bidtellect, Dstillery, Nativo, Quantcast and TripAdvisor, provided a strong foundation for campaigns while supplemental partners were tested and optimized across the varying seasons, including Adara Media, AdRoll, Amobee, SAY Media and StumbleUpon. Media vendors, such as WeatherBug, were specifically rotated into the fall mix to support an inaugural, user-generated content (UGC) initiative called “NC Fall of Fame” – a lively call-to-action for North Carolina visitors to share

their unique fall experiences across the state by posting photos and videos to Visit NC's various social channels.

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, 28 partners were showcased in magazine insertions in:

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

North Carolina Ski Areas Association

Visit North Carolina also partnered with the North Carolina Ski Areas Association on a cooperative marketing campaign promoting GoSkiNC.com, running December 2015 - January 2016. The campaign included cable television in the following markets: Atlanta, Charlotte, Columbia, Greensboro/Winston-Salem, Greenville/Spartanburg/Asheville, Knoxville, Raleigh/Durham, Johnson City/Kingsport/Bristol and Jacksonville, FL.

Golf Travel Marketing

With more than 400 golf courses readily available statewide for public play, North Carolina is a leading destination for golf travel. In the spring of 2015, Visit NC developed and implemented a targeted display campaign with the goal of driving golf enthusiasts to relevant VisitNC.com content (e.g., trip ideas, special offers, partner listings) and ultimately inspiring golf-related travel. This niche campaign was strategically crafted using a known base of top media performers from the early stages of the brand's 2015 spring seasonal campaign, then further targeted to specifically serve golf-related messaging to golf-travel intenders.

VisitNC.com

Overview

As the state's official travel website, VisitNC.com hosted 6,148,302 user sessions, a 14.61 percent increase from 2014. VisitNC.com generated a total of 3,725,501 key performance indicator actions in 2015.

Key 2015 VisitNC.com Performance Indicators

- 28,541 site visitors participating in **sweepstakes**
- 80,029 **Travel Guides** ordered from website
- 7,953 downloads of **virtual brochures**
- 720,426 pageviews of individual **trip ideas**
- 60,279 new subscriptions to **e-newsletters**
- 397,638 site **searches** performed
- 157,108 clicks to view online **travel publications**
- 1,966,199 clicks to **partner websites**
- 23,314 clicks to view **special offers**
- 252,257 on-site **video views**
- 31,757 mobile **phone calls**

Display (Banner) Advertising

44 participating partners
10,548,152 total impressions
32,937 clicks to partner sites
0.31 percent click-through rate

Virtual Brochures

47 virtual brochures
7,953 downloads

Featured Event Listings

353 participating partners
137 total featured events
128,364 views of featured events
32,172 clicks to partner sites

Sweepstakes

7 participating partners/6 sweepstakes
30,368 total entries

Most Popular Homepage Sweepstakes:

1. Carolina Beach in May (6,321 entries)
2. The Travel Guide in January (6,209 entries)
3. Crystal Coast in April (5,875 entries)

International

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

UK.VisitNC.com

8,682 visits

13,867 page views

1.60 average number of page views per visit

1:12 minutes, average visit duration

Microsite complemented by 25,051 additional visits directly to VisitNC.com from U.K. travelers

DE.VisitNC.com

8,299 visits

14,342 page views

1.73 average number of page views per visit

1:37 minutes, average visit duration

Microsite complemented by 10,790 additional visits directly to VisitNC.com from German travelers

ZH.VisitNC.com

581 visits

757 page views

1.3 average number of page views per visit

1:15 minutes, average visit duration

Microsite complemented by 1,185 additional visits directly to VisitNC.com from Chinese travelers

MX.VisitNC.com

10,062 visits

14,151 page views

1.41 average number of page views per visit

1:05 minutes, average visit duration

Microsite complemented by 3,595 additional visits directly to VisitNC.com from Mexican travelers

QC.VisitNC.com

6,311 visits

9,334 page views

1.48 average number of page views per visit

1:06 minutes, average visit duration

Microsite complemented by 7,628 additional visits directly to VisitNC.com from Canadian travelers

Paid Search

VisitNC.com

19,597,058 total impressions
284,390 total clicks
\$0.63 average cost-per-click
\$3.41 average cost-per-KPI

Media.VisitNC.com

43,987 visits in 2015
1.47 average page views per visit
1:37 average time spent on site

SportsNC.com

10,346 visits in 2015
1.95 average page views per visit
1:14 average time spent on site

NCFilm.com

69,529 visits in 2015
2.42 average number of page views per visit
1:43 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 18,000 lodging, dining and attraction 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 2015, Visit North Carolina hosted visits from more than 50 journalists from around the globe and assisted hundreds of travel writers and reporters on stories involving travel to North Carolina. Proactive earned media activities generated hundreds of articles, blog posts and broadcast placements on North Carolina's travel experiences, reaching more than 1.2 billion consumer impressions across the United States and 784 million internationally.
- Visit North Carolina hosted group media tours of engaged editorial decision makers and content creators from across the United States and in the Canada, Germany and United Kingdom international markets. Partnerships with TravelSouth and BrandUSA brought editorial contacts from France as well.

Other Highlights:

U.S. Media Mission

2015 yielded a robust schedule of media missions to strategic media markets Atlanta, Ga. and New York City, as well as engaging in-state editorial contacts in Charlotte, N.C. More than 150 editorial contacts were engaged with North Carolina Story ideas from more than 50 destination partners from around the state. A sampling of top tier outlets hosted included: *Atlanta Journal Constitution*, *Atlanta Magazine*, *BudgetTravel.com*, *Charlotte Living*, *Charlotte Observer*, *Charlotte Parent*, *CNN.com*, *The Daily Meal*, *Essence Magazine*, *Endless Vacation*, *Epicurious.com*, *Family Circle*, *Forbes Travel Guide*, *Four Seasons Magazine*, *New York Daily News*, *Our State*, *Wine Enthusiast* and *USA Today*.

2015 U.S. Target Market Campaign

Visit North Carolina in 2015 focused additional marketing resources on persuading more visitors from Atlanta, Ga. and Washington, D.C. to visit the Tar Heel State. As a part of an integrated marketing efforts, a targeted broadcast earned media campaign was implemented. North Carolina Chef Keith Rhodes from New Hanover/Wilmington's Catch restaurant was featured on FOX Good Day Atlanta and Fullstream Brewery's Founder Sean on D.C.'s ABC affiliate and FOX Good Day D.C. Other placements included ABC's national Let's Talk Live, NBC's Atlanta & Company and ABC's Let's Talk Live and the nationally syndicated Daytime TV. The campaign generated 5.5 million targeted media impressions in these key tourist arrival markets for North Carolina.

North Carolina Beer Month

North Carolina's craft beer community continues to grow. Building upon two successful North Carolina Beer Months in 2013 and 2014 in partnership with the Craft Brewers Guild, Visit North Carolina seized the opportunity and momentum by partnering with more breweries and creating more custom craft beer events for travelers to the state for the 2015 North Carolina Beer Month.

Visit North Carolina collaborated with Aviator Brewing Company to create the second annual Brewmaster Sweepstakes, allowing craft beer enthusiasts the chance to become a brewmaster for a day and brew and name their own beer. Visit North Carolina also partnered with the Craft Brewers Guild and Sierra Nevada Brewing Company to provide one lucky Instagram participant a ticket to the prestigious Sierra Nevada Beer Camp.

This popular Visit North Carolina earned-media lead promotion was also enhanced in 2015 with the creation of the new "Pint Hound Brewery Challenge" Passport. Beer enthusiasts were invited to download a passport and collect stamps at participating breweries to claim prizes such as keychains, T-shirts and customized Freakers, the ultimate beer accessory from Wilmington-based Freaker USA.

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

- The third annual North Carolina Beer Month featured more than 90 brewery partners.
- North Carolina Beer Month was covered in more than 90 articles, generating 62,500,000 incremental media impressions and \$388,362 in publicity value. Major players included AOL.com, *Baltimore Sun*, *The Beer Advocate*, *Charlotte Observer*, *Chicago Tribune*, *Orlando Sentinel*, *Myrtle Beach Sun News*, *The New York Times*, *Raleigh News & Record* and *Toronto Star*.
- Fullsteam Brewing's Sean Wilson appeared on two live segments in Washington, D.C., including Fox's Good Day D.C. and ABC's Let's Talk Live, showcasing the state's craft beer product.
- 27,856 total visitors to www.ncbeermonth.com in March and April.
- 3,047 downstream clicks to partner sites in April, making for a 18.23% conversion rate.
- Sierra Nevada Beer Camp winning post received 1,483 Instagram likes and 37 comments.
- #NCBeerMonth was used 17,567 times in April on Twitter, for 17,662,801 potential impressions, and 1,092 times on Instagram for 966,197 potential impressions.
- During April, the @NCBrewersGuild Instagram account grew from 232 followers to 695.
- Total of 188,600 unlocked badges on Untappd (up from 45,417 in 2014) reaching a potential of 15.8 million beer enthusiasts (up from 6.8 million in 2014).
- Distributed five NC Beer Month e-newsletters, sending to between 5,740 and 7,300 subscribers with the number of subscribers increasing each week through sign-ups. Those five e-newsletters had an average open rate of 34.12 percent.
- 67 participants for the first-ever Pint Hound Passport in which participants could collect stamps from breweries across the state to receive prizes
- Hotel occupancy increased 3.1 percent statewide in April 2015 from April 2014, and room demand increased 3.7 percent statewide as well.

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, the North Carolina Outdoor Advertising Association and UNC-TV remain key to Visit North Carolina's ability to cost-effectively reach more than nine million prospective travelers in the state's own backyard.

North Carolina Association of Broadcasters

Member television and radio stations aired 36,293 spots representing a value of \$2,311,903.

North Carolina Press Foundation

One hundred forty-one papers published 1,292 ads representing a value of \$1,159,613.96.

UNC-TV

UNC-TV's award-winning team produced 52 weekly episodes of its popular show *North Carolina Weekend* during the past year. Each episode was broadcast statewide three times weekly with a reaching more than 4.5 million households in Charlotte, Greensboro, Raleigh, Norfolk and Greenville-Spartanburg. The 280 airings on Thursday nights alone averaged a .73 rating, reaching 1,913,520 households, and the 737 airings on UNC-EX and The NC Channel averaged a .11 rating, reaching 741,422 households. The series featured more than 260 destinations, attractions and events across the state.

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

Visitor Services

North Carolina's nine Welcome Centers hosted 9,367,603 visitors in 2015. A breakout of the number of visitors by Welcome Center location is below:

2015 Welcome Center Estimated Visitors	
I-95 S	1,123,603
I-95 N	1,612,813
I-85 S	1,264,788
I-85 N	616,235
I-77 S	320,880
I-77 N	1,071,539
I-40 W	1,804,394
I-26 W	289,459
I-26 E	1,263,892
Total:	9,367,603

The I-40 West Welcome Center was the most visited in 2015, hosting 1,804,394 travelers.

Welcome Centers registered nearly 15,000 visitors from other countries, including 10,300 from Canada.

In 2015, Welcome Centers booked about 22,300 room nights, representing total revenue of more than \$2 million at an average rate of \$95.37 per room night.

Inquiry/Call Center

In 2015, Visit North Carolina received roughly 3.9 million inquiries and mailed 205,000 NC *Travel Guides* to potential visitors.

2015 Inquiries

Reader Service	41,683
1-800-VisitNC Calls	20,300
Web Inquiries	3,724,839
Total	3,786,822

Publications

The Official 2015 North Carolina Travel Guide

The result of work throughout 2014, Visit North Carolina worked with Journal Communications to produce the *Official 2015 North Carolina Travel Guide* to serve as Visit North Carolina's primary fulfillment piece for potential visitors to and within the state. A photocentric design and state-of-the-art digital options brought a variety of interesting attractions to life in a handbook unique among state travel guidebooks. Completely advertiser supported, the *Travel Guide* was produced at no cost to North Carolina's taxpayers with support of \$1 million from 100 partners.

Two covers were created for the guide, which included 900 attractions and nearly 3,800 accommodations and travel resources in every county. One cover featured the scenic coastal town of Manteo, and the second cover spotlighted Bentonville State Historic Site, where the state's largest Civil War battle occurred and a reenactment of the 150th anniversary of the Battle of Bentonville took place in 2015. The digital edition, available for Apple, Android and Kindle, toggled between these two stunning images.

525,000 copies of the 172-page *Travel Guide* were distributed at North Carolina Welcome Centers, through VisitNC.com and 1-800-VISITNC, and by partners across the state and throughout the country.

Readers of the guide's print and online editions found abundant information presented in a design unlike that of any other state travel guide. The *Travel Guide* featured beautiful, large photographs and brief copy blocks on a variety of topics of interest to visitors, including festivals, cuisine, family fun, military and Southern culture. The pages were modeled after upscale consumer catalogs such as *Williams-Sonoma*, *Pottery Barn* and *Restoration Hardware* to appeal to North Carolina visitors, and incorporated new fonts and colors to reflect the new branding used on VisitNC.com. The print version directed readers to online extras, and the online edition linked directly to videos and related content.

NewsLink

Emailed weekly to 4,950 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 2015, *NewsLink* covered 797 stories within the 51 weekly and one "Special Edition" issues, providing timely information on tourism-related research, statewide and international trends, media leads, updates on conferences and events, plus other items of interest to those in the tourism field.

There is no subscription charge for this e-newsletter and it is available to anyone with a valid email address and is only sent to those who have requested to receive the newsletter.

Domestic Marketing

American Bus Association (ABA) Marketplace, January 2015, St. Louis, MO

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 2015 Marketplace, Visit North Carolina:

- Teamed with 24 in-state partners to host 28 tour operators for dinner.
- Conducted 30 appointments with tour operators during the week, promoting group travel throughout the state.

Travel South Showcase, February 2015, Shreveport, LA

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 13 travel industry partners and conduct strategic, business development meetings with more than 300 tour operators from more than 30 states plus Canada.
- Brief domestic and international media and tour operators, focusing on what's new with the state's tourism products and on North Carolina's position as a travel destination market leader.

Familiarization Tours

Annual Blue Ridge Parkway FAM Tour: In April 2015, Visit North Carolina partnered with Virginia and Tennessee to host a seven-day tour of the Blue Ridge Parkway with 26 AAA and CAA representatives from the United States and Canada. Spent several days with group in all areas of the NC mountain region.

Sales Mission

Five partners participated in a sales mission to Milwaukee and Chicago regions, visiting tour operators and AAA Auto Club offices. They traveled via executive motorcoach, inviting clients onto the coach to meet with partners in more authentic, personalized atmosphere, calling it "Office on Wheels." Also hosted a client dinner in Chicago for AAA representatives and tour operators.

International Marketing

International Web Traffic

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

	U.K.		Germany		Mexico		China		India	
	2014	2015	2014	2015	2014	2015	2014	2015	2014	2015
January	2,096	2,292	645	919	177	270	45	74	497	816
February	1,724	2,207	592	927	165	217	86	125	471	776
March	1,754	2,403	760	868	198	454	114	110	934	1,054
April	2,010	1,896	920	910	207	349	136	139	1,078	2,598
May	2,096	2,164	951	1,032	232	404	108	151	1,206	4,227
June	2,670	2,247	1,132	928	258	340	82	59	934	1,206
July	2,017	2,456	887	968	252	262	64	49	752	2,189
August	2,101	2,164	915	997	255	279	93	57	589	1,955
September	1,795	1,759	1,043	844	257	315	90	90	653	1,255
October	1,780	1,885	1,008	883	395	290	62	79	692	1,264
November	1,391	1,589	616	727	257	205	57	56	721	931
December	1,401	1,989	613	787	215	210	97	62	782	626
Totals	22,835	25,051	10,082	10,790	2,868	3,595	1,034	1,279	9,309	18,897

Canada

- No. 1 international market with 494,274 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 \$121.2 million.
- Multiple daily non-stop flights to Charlotte Douglas and Raleigh-Durham airports

Cooperative Marketing & Advertising Opportunities

CAA: Visit North Carolina hosted a series of webinars to drive visitors to the state targeting all three regions.

Consumer Campaign with Have Baby Will Travel and Honda:

Visit North Carolina partnered with Toronto blogger, Corinne McDermott and Honda Canada to launch a social media contest in June 2015. Corinne and her family vacationed in NC exploring coastal, piedmont and mountain adventures. The campaign included daily social media posts, contest page, Honda car rental and a prize giveaway.

Social Media Results:

Twitter: 35,440 impressions, 1,045 engagements

Facebook: Reached 6,776 with 246 engagements

Zoomer Magazine:

To position North Carolina as the ideal vacation destination, Visit North Carolina partnered with *Zoomer Magazine* on advertorial content. This publication resonates with North Carolina's target demographic that has more interest, time and money available to travel.

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

Sales Missions, Familiarization Tour and Tradeshows

The Canadian Sales Mission was held in Toronto, April 2015. Partners from Outer Banks, Biltmore, Visit Charlotte and Fearington met with FIT and motorcoach operators doing trainings and asset update meetings during the week.

The CAA Travel Agent FAM Tour took place October 23-26, with a focus on the Piedmont region of the state to encourage visitors to get off the highway when traveling through the state. Seven front line agents from South Central Ontario and Quebec offices toured attractions in Lexington, Burlington, Asheboro and Seagrove.

Visit North Carolina also attended the Ontario Motorcoach Association Marketplace in London, Ontario, Nov. 15-18, and had 20 prescheduled appointments with Canadian tour operators.

Canadian Public Relations Results

- Attended TMAC and Discover America Day events.
- Eighty-nine placements with a total reach of more than 40.5 million impressions.

Overseas Visitors

In 2015, North Carolina attracted more than 1.2 million international visitors who spent an estimated \$440 million 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, India, Mexico, Japan, France, Ireland and Italy.

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

Rank	Country of Origin	2015 Est. Visitors	% change from 2014	2015 Total Spent	% change from 2014	Avg Spending per Visitor
1	Canada	494,274	-5.3%	\$121,188,650	-3.3%	\$245
2	United Kingdom	92,402	-7.4%	\$34,886,900	4.8%	\$378
3	Germany	76,726	-11.6%	\$25,696,208	-4.0%	\$335
4	China/Hong Kong	55,658	24.0%	\$41,041,253	21.0%	\$737
5	India	42,987	8.8%	\$17,140,205	17.5%	\$399
6	Mexico	35,152	-7.7%	\$13,184,270	-6.3%	\$375
7	Japan	28,497	-4.0%	\$14,317,363	-14.9%	\$502
8	France	24,831	-17.5%	\$9,381,063	-2.1%	\$378
9	Ireland	14,861	3.9%	\$5,595,238	1.7%	\$377
10	Italy	14,200	-7.7%	\$6,067,355	-13.5%	\$427
11	Brazil	12,025	-45.3%	\$6,000,966	-36.9%	\$499
12	Spain	11,212	8.2%	\$2,796,810	-6.2%	\$249
13	Australia	10,091	-9.6%	\$3,902,323	-15.9%	\$387
14	South Korea	9,961	-0.9%	\$4,769,033	11.4%	\$479
15	Switzerland	8,478	-0.8%	\$5,182,430	-0.8%	\$611
	Other	325,844	0.8%	\$132,144,691	-4.1%	\$406
	TOTAL	1,257,199	-5.2%	\$443,294,758	-1.8%	\$353

* Spending only includes what is spent in North Carolina

*** Visit North Carolina estimates based on extrapolations from government data and aggregate Visa usage data provided by VisaVue Travel for the period of calendar year 2015. Data is subject to change upon receipt of additional data.

North Carolina continues to rank in the top 20 most-visited states nationwide, according to estimates released by the U.S. Department of Commerce. The state ranked No. 17 in 2015.

Overseas ⁽¹⁾ Visitors To Select U.S. States and Territories: 2014-2015

2015 Rank	Destination (State/Territory)	2015 Market Share
1	New York	27.1
2	Florida	25.2
3	California	21.2
4	Nevada	9.1
4	Hawaiian Islands	7.9
6	Massachusetts	4.7
7	Texas	4.7
8	Illinois	4.5
9	Guam	3.9
10	Arizona	2.7
10	Pennsylvania	2.7
12	Georgia	2.6
13	New Jersey	2.6
14	Washington	2.2
15	Utah	1.6
16	Louisiana	1.4
17	North Carolina	1.3
18	Michigan	1.3
19	Colorado	1.2
20	Virginia	1.2

(1) Excludes visitation from Canada and Mexico;

Source: U.S. Department of Commerce, ITA, National Travel and Tourism Office, July 2016

U.K. and Ireland

- No. 1 overseas market with 92,402 visitors.
- These visitors spent \$34.9 million, up 4.8% from 2014.
- Two daily non-stop flights to Heathrow.

Sales & Marketing Accomplishments

In addition to Visit North Carolina's co-op marketing with key tour operators in the U.K., Visit North Carolina teamed with tour operator specialist, America As You Like It. Marketing activities included e-newsletters featuring NC fly/drive itineraries and national press advertising in the *Express* newspaper.

Trade Shows

- Once again, Visit North Carolina joined other Travel South USA states exhibiting at WTM London.
- Visit North Carolina participated in the Destinations Consumer shows in Manchester and London held in the key planning months of January and February.

Sales Missions

- Visit North Carolina teamed with Georgia and South Carolina Tourism offices on a tri-state sales mission to Dublin, Manchester and London. Showcasing barbecue to tour operators at events in all three regions, as well as tour operator marketplace in central London.

U.K. Public Relations Results:

- Media familiarization tour focusing on the state and national parks with four journalists visiting Charlotte, Blowing Rock, Grandfather Mountain, Asheville and Bryson City.
- Sixty-three placements with a total reach of more than 207.7 million impressions.

Germany

- No. 2 overseas market with 76,726 visitors.
- These visitors spent \$25.7 million.
- Supporting two daily non-stop flights to the state – one additional seasonal flight.

Sales and Marketing Accomplishments

Visit North Carolina conducted cooperative marketing with tour operators that included trainings and client evening presentations throughout Germany.

CANUSA Vacation Planner

In Visit North Carolina's continued partnership with tour operator CANUSA, Visit North Carolina was a featured destination on their Vacation Planner site. To assist with marketing the site, Visit North Carolina hosted a familiarization tour of CANUSA's best agents and product manager to the coast and piedmont regions.

Knecht Reisen

Following participation on the US Open FAM in 2014, North Carolina gained a new fly/drive itinerary with Knecht for their main catalog. In addition, Visit North Carolina was featured in their golf brochure and the state, along with Outer Banks and Charlotte, were featured in the "Best of the South" brochure.

Sales Mission focused on tour operators in Frankfurt, attending the Meier's Weltreisen travel agent show as well as conducting trainings and co-op marketing.

Consumer & Travel Trade Shows

- Attended ITB in Berlin with the Travel South region
- CMT Stuttgart – January
- f.r.e.e. Munich – February
- Reisen Hamburg – February
- VUSA in Switzerland and Austria

German Public Relations Results:

- 210 placements with a total reach of more than 536 million impressions.

Other International News

- Visit North Carolina, Visit Charlotte and other statewide partners hosted the Travel South International Showcase in Charlotte from Nov. 30 – Dec. 3. 80 international tour operators from 12 countries met with North Carolina CVBs, attractions and hotels to increase interest in international visitation to North Carolina.
- Following the American Airlines/US Airways merger, a majority of international flights remained in CLT.
- Visit North Carolina hosted a double North Carolina booth at the U.S. Travel Association's IPW in Orlando. Visit Charlotte joined the state with more than 40 trade and media appointments.
- Through a partnership with Travel South USA, Visit North Carolina had limited PR and marketing representation in France, Italy and the Benelux countries.

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, Department of Commerce's Division of Community Assistance, Department of Natural & Cultural Resources and NC Arts Council, NC Folklife Institute, Handmade in America, Homegrown Handmade and NC State Cooperative Extension 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 during the African American Heritage Commission planning meetings.
- Represented Visit North Carolina on the revamping and promotion of the Blue Ridge Music Trails of NC.
- Continued promotion of the NC Certified Retirement Community Program

Tourism Resource Assistance Center (TRAC)

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

TRAC sessions prior to 2015:

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 – Stokes Co.
13. Pinehurst
14. Yadkinville

15. Warrenton
16. Greenville
17. Blowing Rock
18. Banner Elk/Beech Mountain

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 TDA development, marketing initiatives, heritage trails development and product development plans.

Blue Ridge National Heritage Area (BRNHA)

Created by congressional legislation, the BRNHA is supported through a partnership with 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 county initiatives outlined in each county's heritage plan, and has an active role in assisting the BRNHA in developing, facilitating and guiding communities along the Blue Ridge Parkway for themes such as agriculture, arts and culture, traditional music, history/heritage and natural resources. In addition, 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 the new book and map guide, as well as worked closely with the communities participating in the NC STEP Program through the NC Rural Center and the NC Main Street Program.

Appalachian Regional Commission (ARC)

Visit North Carolina also continued efforts with the Appalachian Regional Commission Tourism Council in developing an updated culinary guide of restaurants, agritourism farms, farm-to-table, restaurants, microbreweries and distilleries within the region. The guide was distributed in the 2015 spring issue of *Edible Communities Magazine*.

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, and the map was also available via www.civilwartraveler.com.
- N.C. has 239 sites in 78 counties.

Cultural Heritage Trails Development

- Assisted in the revamping of the Blue Ridge Music Trail, 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.
- Contacted the Daniel Boone Heritage Trail Committee on possible resources and marketing opportunities.
- Worked with the African American Heritage Commission in the development of “Freedom Roads” Underground Railroad Heritage Trail, as well as worked with the Gullah Geechee National Heritage Corridor.
- Continued to work with the NC Folklife Institute to promote the traditional arts of NC.

Certified Retirement Community Program

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

To gain certification, a local government must submit an application for consideration. Initial evaluation of the community and technical assistance is provided by 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 Commissions and City Managers on the guidelines, requirements and benefits of the program to increase participation (Currituck, Smithfield, Emerald Isle, New Bern, Lenoir and Leland).
- Visit North Carolina continued to promote certified communities and areas of NC during the Ideal Living Regional Expos in Boston, MA; Long Island, NY; Greenwich, CT; Parsippany, NJ; and Washington, D.C.
- 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’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

- 2015 CRC additions:
 - New Bern
 - Lenoir
 - Laurinburg
 - Reidsville

Industry Relations

Governor's Conference on Tourism in Pinehurst (March 8-10)

Visit North Carolina's annual conference featured dynamic, educational programming and valuable networking opportunities, and drew a record crowd. Secretary of Commerce, John Skvarla presented the 2015 Winner's Circle Awards to three distinguished North Carolinians for their contributions to the growth and success of the tourism industry in the state.

Tourism Week in Raleigh (May 3-11)

Gov. McCrory proclaimed during the May 3-11 North Carolina Tourism Week that the travel industry had a record impact on the North Carolina economy in 2014, with more than \$21 billion in direct visitor spending, generating more than 200,000 tourism employment jobs. In addition, state tax receipts as a result of visitor spending topped \$1 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 hosting a legislative breakfast, meeting with legislative representatives and closing with a legislative reception at the NC Museum of Natural Sciences. North Carolina's nine Welcome Centers hosted their own events during the week to thank travelers to the state.

Regional Mid-Year Listening Tours (September and October 2015)

Visit North Carolina went on the road again 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) brings 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. This year, Visit North Carolina wanted to hear more about what's affecting the various regions of the state and how Visit NC can work with partners on marketing solutions. 2015 events were held in 12 areas within all three regions of the state.

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 that provides 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. 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 (NCFO)

The North Carolina Film Office (NCFO) and regional film commissions promoted filmmaking in North Carolina at the annual Association of Film Commissioners International (AFCI) and on several sales calls to the West Coast. In 2015, the NCFO returned to the Sundance Film Festival in Park City, Utah—this time joined by partners from the Wilmington Regional Film Commission, Inc., Piedmont Triad Film Commission and the Charlotte Regional Film Commission. The NCFO sponsored and hosted events and panel discussions at the Cucalorus Film Festival (Wilmington), RiverRun International Film Festival (Winston-Salem) and the Full Frame Documentary Film Festival (Durham), while promoting more than 30 film festivals held across the state. NCFO staff also made multiple speaking engagements at conferences and civic meetings.

2015 saw the start of the new Film and Entertainment Grant, which at first had a one-time allocation of \$10 million (the grant was raised to \$30 million/fiscal year at the end of the legislative session; however, the additional allocation of funds was not available until January 2016). While the change in the incentive program resulted in a drop in the number of productions, in-state spending by productions, employment numbers, and number of production days, it will result in the state itself directly spending less money in the form of refundable tax credits/rebates.

2015 N.C. Department of Revenue Film Tax Credit Report*:

- Five new projects
- \$96,344,090 in direct spend by productions that requested the film tax credit
- 3,627 people employed
- \$24,086,023 cost of credit

**The report issued by the NCDOR only reflects paperwork submitted between May 2015 and April 2016, includes numbers from projects that filmed prior to this timeframe and does not include all projects that actually filmed during this same timeframe.*

2015 Total Production Estimates & Highlights from N.C. Film Office:

- 112 new projects
- 45 projects shot in North Carolina and registered with the NCFO
- \$71,621,024 direct spend by productions (second-highest year-end total)
- 1,374 production days
- 4,740 jobs created
 - 1,443 crew, 701 talent, 2,596 extras

Highlights of film projects during 2015 include:

- *Under The Dome (Season 3)* – Wilmington Region (grant recipient)
- *Wicked Tuna: Outer Banks* – Northeastern Region
- *A Chef's Life (Seasons 2 & 3)* – Eastern Region
- *My Big Fat Fabulous Life (Season 2)* – Piedmont Triad Region
- *Love It or List It (NC Season 1 continued)* – Research Triangle Region
- *Good Behavior – Pilot Episode* – Wilmington Region
- *The Legacy of a Whitetail Deer Hunter* – Western Region
- *National commercials for Oscar Meyer, Golden Corral, Goodyear, Nationwide and Mountain Dew*