



# 2023 Annual Report

Visit North Carolina

A Part of the Economic Development Partnership of North Carolina

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

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Visit North Carolina 

## **Table of Contents**

NC Travel and Tourism Board	3
EDPNC Introduction	5
2023: The Year in Review	5
2023 Results	6
Visit North Carolina Budget Overview	7
NC Visitor Services Budget Overview	7
State Tourism Office Budgets	8
Marketing Program Highlights	9
VisitNC.com and Family of Websites	12
In-State Marketing Efforts	14
Public Relations	14
Visitor Services	15
Publications	16
Outdoor NC	17
Domestic Partner Marketing	18
International Marketing	19
Tourism Development	21
Industry Relations	24
North Carolina Film Office	25

## **2023 NC Travel and Tourism Board**

*Listed here is the Board for the year 2023 as required for the Annual Report. For information on the current board, please go to <https://partners.visitnc.com/travel-tourism-board-1>.*

### **Kimberly Albritton**

Great Smoky Mountain Railroad  
Appointed By: Speaker of the House

### **Jim Beley**

The Umstead Hotel  
Appointed by: NCRLA

### **Rolf Blizzard, Chair**

Turnpike Properties  
Appointed By: NC Travel & Tourism Coalition

### **Christopher Chung**

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

### **Sen. Dave Craven**

North Carolina Senate  
Appointed By: Senate President Pro Tempore

### **Dennis Edwards**

Greater Raleigh CVB  
Appointed By: NC T&T Coalition

### **Arthur Fisher**

Fisher Realty of Brevard  
Appointed By: Senate President Pro Tempore

### **Shannon Gilligan**

Charlotte Hornets  
Appointed By: Governor

### **Sen. Bobby Hanig**

North Carolina House of Representatives  
Appointed By: Senate President Pro Tempore

### **James Meacham**

Rowan Co. CVB  
Appointed by: DMANC

### **Rep. Charles Miller**

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

### **Lynn Minges**

NC Restaurant & Lodging Association  
Appointed By: NCRLA – Lodging

**Lee Nettles**

Outer Banks Visitors Bureau

Appointed By: EDPNC

**Steve Pasquantonio**

Blue Mainsail Inc.

Appointed By: Governor

**Rep. Ray Pickett**

North Carolina House of Representatives

Appointed By: Speaker of the House

**Secretary Machel Sanders**

NC Department of Commerce

Appointed By: NC Department of Commerce

**Andrew Schmidt**

Greenville/Pitt Co. CVB

Appointed By: NCTIA

**Vivek Tandon**

Tandon IV, LLC

Appointed By: Speaker of the House

**Greg Walter**

Charlotte Motorspeedway

Appointed By: Senate President Pro Tempore

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

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

### **2023: The Year in Review**

The North Carolina tourism industry saw continued recovery in 2023 with \$35.6 billion in visitor spending statewide, the highest level ever. 2023 saw growth in visitor spending for both urban and rural counties with 98 of North Carolina's 100 counties seeing increases in spending compared with 2022. Orange, Wake, Camden and Warren were among the counties that led the state's 6.9 percent growth in visitor spending. Eight of the state's 100 counties had double-digit increases in visitor spending from 2022.

The state's tourism-supported workforce increased 4.8 percent to 227,200 jobs in 2023. Growth in direct tourism employment was also seen among rural and urban counties with nearly 20 percent of counties seeing higher than average growth. Tourism payroll increased 6.6 percent to \$9.3 billion. Also, as a result of visitor spending, state and local governments saw rebounds in tax revenues to nearly \$2.6 billion.

*Source: Tourism Economics*

Partnerships with destinations, attractions, lodging and dining properties and associations statewide remain key to North Carolina's success. In 2023 North Carolina was the fifth most visited state in the nation for domestic visitation.

*Source: OmniTrak TravelTrakAmerica*

### **Program Highlights for 2023**

Direct employment generated by travelers in North Carolina increased 4.8 percent in 2023 to 227,200 jobs. Employment as a result of tourism still lags behind the record of 242,600 set in 2019.

*Source: Tourism Economics*

On an average day in 2023, visitors in North Carolina spent more than \$97 million and contributed more than \$7.1 million in state and local taxes.

*Source: Tourism Economics*

Visit NC partners with SMARInsights to measure the effectiveness and ROI of paid media and awareness of advertising generated a 14-point lift in likelihood to visit North Carolina in 2023. The overall campaign influenced an overall travel increment of 6.7 percent.

## 2023 Results

### Visitor Spending

In 2023, it is estimated that visitors to North Carolina spent \$35.6 billion in the state, an increase of 6.9 percent from 2022. Visitor spending directly supported 227,200 jobs for North Carolina residents and the tourism industry directly contributed \$9.3 billion to the state's payroll in 2023.

Traveler spending generated nearly \$4.5 billion in federal, state and local tax receipts, an increase of 5.8 percent from 2022.

*Source: Tourism Economics*

### 2023 Travel Volume

North Carolina person-trip volume was 43 million in 2023, ranking North Carolina No. 5 in total domestic person-trip volume.

*Source: Omnitrak*

### 2023 Total State Rankings by Volume

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

*Source: Omnitrak*

### Average Trip Spending

North Carolina overnight visitor parties spent approximately \$1,024 per trip in 2023. Out-of-state visitors spent approximately \$1,230 per trip in 2023, while in-state resident travel parties spent \$598 per trip on average. This represents a 69 percent difference in average per trip spending among resident visitors traveling within the state and out-of-state visitor parties.

U.S. overnight travel parties on average spent \$1,015 per trip in 2023.

*Source: Omnitrak*

### Average Overnight Trip Duration

The average length of stay of North Carolina visitors was 3.4 nights in 2023. 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 3.3 nights per trip in 2022.

*Source: Omnitrak*

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

- NC 42%
- SC 9%
- VA 7%
- GA 6%
- NY 5%
- FL 4%
- MD 4%
- PA 3%
- TN 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, other activities such as the beach, visiting historic areas, rural sightseeing, fine dining, local arts & crafts, hiking, museums, wildlife viewing, state/national parks and trying unique local cuisine were among the most popular specific activities surveyed.

Source: Omnitrak

### Visit North Carolina Budget Overview

Marketing Media Purchase & Production	\$4,624,902
One-time COVID Recovery Funding (marketing)	\$7,500,000
Personnel & Administration	\$1,731,817
Rent, Facilities and Computers (tech and licensing)	\$423,465
VisitNC.com Dev. & Maintenance (Interactive)	\$1,009,000
International Marketing (Canada, Germany, UK)	\$1,169,126
Film Office Marketing	\$454,623
Public Relations	\$663,545
Domestic Sales Promotion (Group, Sports and Outdoor NC)	\$401,175
RetireNC and Industry Relations	\$121,230
Research	\$822,600

**TOTAL** **\$18,921,483**

### North Carolina Visitor Services Budget Overview

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

Appropriations included:

Welcome Centers	\$2,548,213
Inquiry/Fulfillment	406,154
<hr/>	
Total	\$2,954,367

### State Tourism Office Budgets: 2023-24

North Carolina's budget of approximately \$18.9 million included special one-time funding from the legislature to assist in COVID recovery for the state's tourism industry. Unfortunately, due to other states receiving similar funding for recovery efforts in their states. **Our budget is the lowest among southern state tourism office budgets in 2023-24, significantly behind several states that are direct competitors.**

State	Projected 2023-24 Budget	Number of FTE staff
Tennessee	54,606,900	29
Virginia	52,051,607	36
Louisiana	47,474,719	21
Georgia	42,449,932	20
West Virginia	38,912,417	13
Alabama	33,199,000	14
Arkansas	31,327,703	15



Mississippi	30,705,225	21
Kentucky	28,473,035	29
South Carolina	26,397,817	23
Missouri	22,732,150	17
North Carolina	18,921,483	14

*\*Budgets and staffing are estimates provided by State Tourism Directors to the U.S. Travel Association and Travel South USA. They do not include Welcome Center staff as not all tourism offices manage those areas.*

## Marketing Program Highlights for 2023

Visit NC partners with SMARInsights to measure the effectiveness and ROI of paid media and awareness of advertising generated a 14-point lift in likelihood to visit North Carolina in 2023. The overall campaign influenced an overall travel increment of 6.7 percent.

### Brand Advertising Campaign

In looking to gain market share in domestic visitor volume, our vision for 2023 was clear— we aimed for North Carolina to be the first state that comes to mind for travelers seeking unforgettable experiences in the East. With a focus on enhancing unique offerings and creating memorable visitor experiences, we embarked on this journey to solidify our position as a premier travel destination.

To achieve this goal, we launched a dynamic new campaign: ‘For Real, Visit NC.’ This initiative focused on three key objectives: attracting travelers to visit, encouraging them to stay longer and spend more, and prompting quicker return visits. Insights from a brand evolution highlighted North Carolina’s unique strengths and competitive landscape, centering our messaging on “welcome to the deeply authentic experiences of North Carolina.” The campaign features bold, striking headlines juxtaposed against breathtaking visuals of North Carolina’s authentic offerings. With a four-season approach, we captured extensive footage across over 40 locations in 20 counties, showcasing both marquee attractions and hidden gems. Tailored to nearly 50 geographic markets, our video-centric campaign spots were designed to resonate with our three primary audience groups, Discoverers, who are hungry for adventure and discovery, Enrichers, who seek unique experiences and hidden gems, and Family-Centric – who want memorable experiences to share with their entire families, utilizing data-driven strategies to maximize visitation potential and ROI.

Research insights played a pivotal role in shaping our campaign development and performance in 2023. Notably, 80% of returning visitors expressed a desire to explore new places, while 71% of consumers sought more personalized messaging. To address this, we tailored our campaign creatives to align with seasonal experiences and specific audience affinities. With 75% of U.S. adults spending up to two hours daily on short-form digital video, our video-first strategy became essential for effective media placement. Additionally, recognizing that nearly 70% of

travelers were willing to sacrifice convenience for sustainability, we incorporated messaging that highlighted North Carolina's commitment to preserving its natural resources through sustainable practices.

Our strategic media mix combined targeted cable TV buys in high-potential markets during the summer and fall with year-round streaming tactics, including CTT, programmatic pre-rolls, and diverse YouTube ad formats. The campaign achieved impressive outcomes: overall ad awareness rose to 53%, up from 43% in 2022, with a cost per aware household of just \$0.31—below SMARI's benchmark of \$0.35. We observed a 14-point increase in likelihood to visit among surveyed audiences, and incremental spend per visitor jumped to \$310, nearly 40% above the benchmark for state destinations. In total, the campaign generated \$1.8 billion in ad-influenced visitor spending, with a remarkable ROI of 28:1, translating to \$28 returned in state and local taxes for every dollar spent. Overall, North Carolina recorded a record \$35.6 billion in total visitor spending in 2023, surpassing the previous high of \$33.3 billion in 2022. Additionally, our streaming tactics achieved effective Video Completion Rates of 98% for non-skippable ads and 63% for skippable ones, well above the industry benchmark of 32%. As a result of these efforts, North Carolina rose from sixth to the fifth-most visited state in the U.S. Each household in North Carolina benefited, saving an average of \$518 in state and local taxes due to visitor spending, with per capita savings averaging \$239.

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

- 53% consumer awareness for the campaign
- Cost per aware household of 31 cents was just above the benchmark of 31 cents
- Advertising generated an 14-point lift in likelihood to visit
- Campaign excelled at communicating its specific goals, with the majority of objectives ranking in the top 10 percent for comparable studies performed by SMARInsights
- Creative communicated the state's natural beauty and its appeal as a place for disconnecting from the stresses of everyday life, important criteria to the target audience
- "For Real" also received "excellent ratings for showing experiences of interest to consumers and for enhancing opinion of North Carolina as a place to take a leisure trip, signaling the creative message is connecting with consumers' emotional reasons for travel"

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

- Sparked 1,288,490 trips and \$1.8 billion in incremental visitor spending
- Generated \$310 in visitor spending per dollar of media investment
- ROI of \$28:1 in state and local taxes generated per dollar of media investment

## **Paid Social & Content Creator**

In 2023, Visit NC executed a diverse social campaign across paid social and content creators. We ran paid social advertising across Meta (Facebook and Instagram), Pinterest, and TikTok. We diversified our platforms, to expand our reach within our core, high travel-intent audiences. On these channels we ran a mix of static and video creative optimized for engagement and actionable intent, like website traffic and email leads. Our paid social efforts delivered 93.8 million impressions, 2.8 million engagements, 20.3 million video views, and over 2 thousand new email addresses.

We also executed a year-long creator program on IG, TikTok, Pinterest and blogs, sending **4** in-state and **3** out-of-state creators to North Carolina. During this time, we curated accessible travel guides, instilled the principles of Leave No Trace, and gained new ownable content. Combined efforts accounted for more than 2.1 million impressions, 424 thousand engagements (likes, shares, pins), and 525 thousand video views.

## Organic Social

The Visit NC team's organic social efforts in 2023 also generated strong, increased performance across multiple channels. Among the highlights:

- Visit NC yielded more than 13.9 million impressions and more than 1.5 million organic engagements on content deployed across Instagram, Facebook, Twitter, Pinterest, and newly introduced TikTok during 2023.
- Increased engagement across channels and the addition of TikTok to Visit NC's organic platform mix drove a 65% increase in organic impressions and a 337% increase in organic engagements YoY.
- All average organic engagement rates increased YoY and surpassed Travel industry benchmarks (Pinterest industry benchmarks are unavailable)
  - Instagram: 6.63% (Travel Industry Benchmark: 0.398%)
  - Facebook: 1.10% (Travel Industry Benchmark: 0.093%)
  - Twitter/X: 0.66% (Travel Industry Benchmark: 0.01%)
  - TikTok: 4.47% (Travel Industry Benchmark: 3.50%)
- The benchmark achievement rate, as determined by internal benchmarks shaped by historical data and designed to hold Visit NC channels to a higher engagement standard than industry-wide benchmarks, was 88%. This denotes a 7.9% increase YoY in benchmark achievement rate from 2022.
- The top-reaching platform was TikTok, earning over 6.6 million impressions throughout CY23.
- Pinterest maintained success in a revived relevancy. The platform yielded 1.4 million impressions and 44,667 organic engagements from 38 posts within CY23.

## Paid Search

Building on the successes of 2022, Visit NC drove an even greater impact in 2023 through strategic paid search efforts. By capturing and converting qualified user interest, we efficiently directed traffic to VisitNC.com and facilitated valuable downstream clicks to partner sites in addition to other valuable conversion actions such as Travel Guide sign-ups, Travel Brochure page views, and E-Newsletter sign-ups.

Google remained our primary platform, utilizing a mix of "capture demand" and "create demand" strategies. This dual approach engaged travelers already considering North Carolina and inspired those still exploring their options.

Together, Google and Bing achieved an impressive 20.6 million impressions, 776,330 clicks, and nearly 73,269 downstream clicks to partner websites. Our paid search initiatives also resulted in 2,458 Travel Guide sign-ups, 5,394 Travel Brochure page views, and 140 E-Newsletter sign-ups.

## Print

In 2023, the plan included titles and categorized bundles based on strategic alignment across both brand and co-op partner interest.

*Atlanta Magazine*  
*Blue Ridge Country*  
*Bridal Guide*  
*Carolina Country*  
*Cleveland Magazine*  
*Columbus Monthly*  
*Garden & Gun*  
*Orlando Magazine*  
*Outside Magazine*  
*Our State Magazine*

*Philadelphia Magazine*  
*Pittsburgh Magazine*  
*South Carolina Living*  
*Southern Living*  
*Tennessee Magazine*  
*Washingtonian*

## **VisitNC.com**

### **Overview**

VisitNC.com serves as North Carolina's official travel website, connecting thousands of local industry partners with millions of travelers exploring the diverse offerings across the state. Providing inspiration and information on stunning landscapes, vibrant cities, and unique attractions, VisitNC.com highlights the best of what North Carolina has to offer, making it a valuable resource for those planning their next visit.

### **VisitNC.com 2023 Key Performance Indicators**

5,666,790 site page views  
48,489 site visitors participating in sweepstakes  
24,159 Travel Guides ordered from website  
16,163 downloads or views of virtual brochures  
1,074,700 views of story pages  
42,000 new subscribers to Visit NC eNewsletters  
162,770 site searches performed  
4,071 clicks to view online travel publications  
664,880 clicks to partner websites  
26,637 clicks to view travel deals  
1,507 on-site video views  
13,503 mobile phone calls

### **Virtual Brochures**

66 virtual brochures  
16,163 downloads or views

### **Featured Event Listings**

18 participating partners  
43 total featured events  
53,032 views of featured events  
10,528 clicks to partner sites

## **Sweepstakes**

8 sweepstakes  
48,489 total entries

## **Most Popular Sweepstakes**

Dream Big in Small Town NC – p4 (25,777 entries)  
Dream Big in Small Town NC – p6 (11,738)  
Dream Big in Small Town NC – p5 (9,696)  
2023 Outdoor NC Pledge Sweepstakes – p1 (512 entries)

## **Family of Sites**

### **Media.VisitNC.com**

23,501 visits  
2.8 actions (page views, downloads, outlinks and internal site searches) per visit  
4 min 6s average visit duration

### **RetireNC.com**

56,941 views  
2.14 page views per active user  
0:28 avg. engagement time

### **SportsNC.com**

3,000 views  
1.74 page views per active user  
0:25 avg. engagement time

### **FilmNC.com**

102,926 views  
2.66 page views per active user  
1:03 avg. engagement time

## **Database and Web Management**

Working in collaboration with hundreds of partners statewide, the team provided timely maintenance and technical support for VisitNC.com's extranet database of more than 7,000 lodging, attraction, activity, event and dining listings reaching all 100 counties.

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

## **North Carolina Ski Areas Association**

Visit NC and the North Carolina Ski Areas Association (NCSAA) continued working together to build awareness and intent to visit NCSAA member resorts for winter travel. The November 2023 – February 2024 cooperative marketing effort targeted NC, FL, GA, SC, VA and TN—in addition to a national targeting approach in select campaigns—and

drove site visits to GoSkiNC.com and downstream referrals to the resorts' own websites. Continuing to strategically optimize and refine the media mix based on the prior year's results, the focused campaign leveraged digital video, paid search, and paid social to generate 19.7 million impressions, 10.4 million video views, 133,000 clicks, and 21,000 downstream clicks to NCSAA resort websites.

## **In-State Marketing Initiatives**

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

### **North Carolina Association of Broadcasters**

Member television and radio stations aired 66,493 announcements representing a value of \$4,182,068.

### **North Carolina Press Foundation**

Member publishers published 3,750 ads representing an estimated value of \$885,000.

### **PBS North Carolina**

PBS North Carolina's award-winning team airs 52 weekly episodes of its popular show *North Carolina Weekend*. In its twenty-first year, every episode of *North Carolina Weekend* was broadcast multiple times statewide and into parts of South Carolina, Virginia, Tennessee and Georgia on: PBS NC, The Explorer Channel and the North Carolina Channel. Across all PBS media platforms including on-air, online and print materials, Visit NC's partnership with PBS North Carolina and *North Carolina Weekend* provided \$2,537,853 in valuable exposure while featuring more than 200 destinations, attractions and events across the state.

## **Public Relations**

In 2023, the Public Relations program played to the strength of its core media relations strategy with hosted visits from editors and writers. Over the course of the year, Visit NC supported 43 trips by domestic and international media representatives on individual and group visits to 37 destinations that represented a mix of Tier 1, Tier 2 and Tier 3 counties.

Out-of-state media missions returned as a key program that enables partners from local tourism offices to meet with travel media to generate interest in visitation and coverage. Visit NC's PR team led small-scale missions to New York, Atlanta, Washington, DC, and Charleston, SC, with 19 different destination partners participating. The team also hosted a successful in-state media mission in Raleigh with 40 local tourism partners and 40 media representatives attending.

Additional PR success resulted from response to reactive media leads. From these efforts, the team garnered more than 70 placements in outlets including Travel & Leisure, Conde Nast Traveler, Esquire, Forbes, Food & Wine, US News & World Report, Southern Living, Readers Digest, National Geographic Traveler, Country Living, Garden & Gun, Men's Journal and Fodor's Travel. Consumer impressions from PR activity totaled more than 5.7 billion with coverage representing 50 counties, 36 of which were classified as Tier 1 or 2.

## Visitor Services

North Carolina's nine Welcome Centers hosted **7,602,301** visitors in 2023. A breakout of the number of visitors by Welcome Center location is below:

2023 Welcome Center Estimated Visitors	
I-95 S	922,100
I-95 N	1,522,412
I-85 S	749,185
I-85 N	469,372
I-77 S	445,291
I-77 N	967,938
I-40 W	912,788
I-26 W	294,242
I-26 E	1,273,973
<b>Total:</b>	<b>7,602,301</b>

- Welcome Centers greeted 8,544 self-identifying visitors from other countries, representing a 34% increase over 2022.
- While I-95 South was closed for a complete rebuild during this period, the staff assisted visitors from a temporary location at the Cumberland County Rest Area.
- Throughout the year, multiple Welcome Centers and the Call Center upgraded technology, including broadband internet connections. These upgrades will continue throughout 2024.

## Publications

As a result of work throughout 2023, Visit NC contracted with Meredith Travel Marketing to produce the Official 2024 North Carolina Travel Guide published annually each year by mid-December 2023. The Official Travel Guide serves as Visit NC's primary fulfillment piece for potential visitors to and within the state. To underscore the diversity of travel options and depth of the program, the guide features three-page cover for each of the state's three major regions. The Guide makes a strong impression from the start with a cover photo of a wakeboarder at Lake Lure to highlight the mountain region. Flip open to see double-page images representing the state's other main regions: the Piedmont (with the No. 2 golf course at Pinehurst Resort) and the coast (with the Beaufort waterfront across from Cape Lookout National Seashore). Visual appeal across the state comes through in more than 160 images and illustrations depicting natural landmarks, attractions and destination scenes. A detachable map with color-coded regions helps travelers plot the possibilities.

In all, the 112-page guide features more than 150 towns and cities and highlights nearly 350 attractions, restaurants, lodging properties and events. A fold-out map, which is supported by a Town and City Index, expedites navigation as travelers chart getaways. Other editorial highlights include "Traveling Light," a feature on eco-conscious adventures that blends inspirational photography and illustrations; "City Stars," a quick-hits overview of seven urban destinations; and "Golf Getaways," a roundup that directs attention to outdoor activities beyond the greens. Throughout the guide, callouts with QR codes connect readers to the Outdoor NC sustainability principles while "Accessible Fun for All" and "Paw of Approval" entries direct users to related points of interest.

The print edition is available at the state's nine Welcome Centers or by calling 800-847-4862 (800-VISITNC). Readers can also link to [VisitNC.com/travel-guides](https://www.visitnc.com/travel-guides) to request a copy, access the digital edition or download a PDF version. In addition to traditional distribution channels, additional steps were taken to reach target audiences. Visit NC polybagged 100,000 of the 2024 Travel Guides with Midwest Living and Real Simple, national brands that align with Visit NC's audience. Nearly 5,000 guidebooks were distributed directly to inbound travelers through Raleigh-Durham International Airport, Asheville Regional Airport, and Wilmington International Airport.

The 112-page, 2024 Travel Guide was produced by Meredith Travel Marketing. It was financed by private industry support with \$913,000 in advertising. The self-mailer format for printed copies reinforces the green initiatives of Visit NC and the Economic Development Partnership of North Carolina.

## NewsLink

Emailed weekly to 3,598 subscribers, NewsLink is an electronic publication designed to provide information to the North Carolina tourism industry. The mailing list also includes legislators, economic developers and media. In 2023, NewsLink covered more than 541 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, and other items of interest to those in the tourism field.

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



## Outdoor NC

Interest in the outdoors reached new heights during the pandemic and elevated the importance of preserving North Carolina's natural environments to ensure the use and enjoyment of the state's much desired recreational resources for future generations. Visit NC launched Outdoor NC in collaboration with the **NC Outdoor Recreation Industry Office** and **Leave No Trace Center** to educate visitors and residents on appropriate behavior and care for our outdoor spaces.

We expanded the Outdoor NC initiative to further enhance industry partnerships, destination stewardship, and visitor experiences including introducing new programs. In the fall of 2023, Visit NC hosted a series of five Outdoor NC Stewardship Workshops across the state (Corolla, Surf City, Smithfield, Blowing Rock, and Bryson City). The full day workshops introduced all Outdoor NC programming and highlighted evolving destination trends, insights and inspirational case studies related to accessible outdoors, destination stewardship and responsible recreation. Outdoor NC Stewardship Workshops were open to all Tourism Development Authorities and Destination Marketing Organizations staff.

### Areas of Focus:

- Destination stewardship which brings together community allies to find a balance between residents' quality of life and visitors experience.
- Responsible travel which encourages visitors to balance enjoyment of local heritage and nature with respect for community assets.
- Sustainable tourism which emphasizes industry operations that balance economic returns with social responsibility and environmental conservation.

### Flagship Programs:

- **Outdoor NC Partner Alliance** – “Encouraging responsible travel” encourages visitors to balance enjoyment of local heritage and nature with respect for community assets. The Outdoor NC Partner Alliance is designed to educate guests and help stakeholders amplify responsible recreation including utilizing the 7 Outdoor NC Leave No Trace Principles.
- **Accessible Outdoors** “Promoting Outdoors for All Abilities” to empower destinations to share information about accessibility in outdoor recreation for people with disabilities. The Outdoor NC Accessible Outdoor program aims to increase information transparency so individuals can make informed decisions about exploring NC's outdoor spaces based on their abilities.
- **Trail Town Stewardship Designation & Visitor Guide** to “Celebrate Stewardship in Trail Towns” by helping destinations activate and celebrate stewardship activities. Destination stewardship brings together community allies to find a balance between residents' quality of life and guests experience while preserving natural and culture resources.

### Outdoor NC Guide Summit, November 8-9, 2023, Raleigh, NC

This summit is a part of a growing effort to recognize and promote tour guides and outfitters as one of our treasured state's tourism assets. Outdoor NC and Leave No Trace staff developed a custom curriculum and workshop for guides, outfitters, and tour operators in North Carolina. This newly developed, first of its kind, curriculum addresses the Outdoor NC initiative, critical Leave No Trace skills and effective methods to equip guests with these skills during their experience.

### Outdoor Economy Conference, September 18-20, 2023, Cherokee, NC

The Outdoor Economy Conference brings together thought leaders, industry experts, and enthusiasts from across the nation to explore, learn, and collaborate on fostering a sustainable and thriving outdoor economy. As the nation's largest outdoor recreation-focused economic development gathering, the Outdoor Economy Conference aims to provide a holistic understanding of the intricate relationship between outdoor recreation, community health, and economic vitality. Outdoor NC held a Meet & Greet on Monday, Sept 18 to unveil the upcoming

enhancements to Outdoor NC including Accessible Outdoors and Trail Town Stewardship Designation program and had a booth in the expo space.

### **Year of the Trail**

House Bill 554 designates 2023 as the “North Carolina Year of the Trail.” Trails not only help make NC a healthier, more accessible, and fun place to live, they also strengthen the economy in a big way – the outdoor recreation industry in NC has an economic impact of over 28 billion dollars and provides over 260,000 jobs in the state. Visit North Carolina was a sponsor of the Year of the Trail to showcase, promote, celebrate and preserve trails in NC. Through marketing, this statewide campaign increased awareness about trails, boost use by locals and visitors, reach underserved communities, recognize volunteers and promote responsible and safe use of the trails.

### **Domestic Partner Marketing**

#### **American Bus Association, January 4-6, 2023, Detroit, MI**

Visit NC attended the 2023 American Bus Association (ABA) Meeting & Marketplace, one of the premier industry events for motorcoach travel. Visit NC had 22 scheduled appointments with motorcoach and tour operators during the week, promoting group travel throughout the state. Eight tourism partners attended.

#### **NCMA-VMA-MCASC Regional Meeting, August 22-25, 2023, Cherokee, NC**

Sponsored the North Carolina Motorcoach Association, Virginia Motorcoach Association & South Carolina Motorcoach Association regional meeting in Cherokee.

#### **Southeast Tourism Society Domestic Discovery, April 17-22, 2023, Huntsville, AL**

It is the premier Marketplace event in the Southeast where over 600 tourism professionals gather for 2 days of intensive meetings with a goal of delivering more visitors, spending more time, and more money in the Southeast region. This regional appointment-style marketplace offers the most targeted opportunity for group tour operators, tour wholesalers, and group tour leaders can meet face-to-face with Suppliers from the Southeast region. Visit NC had 21 scheduled appointments with group tour planners and nine partners represented.

### **Sports**

#### **Cycle North Carolina, October 1-7, 2023**

Cycle NC's 24th Annual Mountains to Coast ride rolled through North Carolina in October 2023. The 2023 event had 855 participants from 41 states, DC, Germany, Switzerland, Scotland, England and Australia. The ride was scheduled to start in Banner Elk, and have overnight stays in Wilkesboro, Winston-Salem, Mebane, Henderson, Tarboro, and Kinston, ending at Emerald Isle. The Mountains to Coast Ride as well as the Mountain and Coastal Ride routes also passed through Wilkes, Vance, Nash, Edgecombe, Greene, Lenoir, Jones, Rutherford, Watauga, Caldwell, Yadkin, Forsyth, Guilford, Alamance, Granville, Franklin, Pitt, Onslow, Pamlico, Beaufort, Craven, Polk, McDowell, Avery, Orange, Durham, Carteret, and Buncombe County.

For the seventh year, Visit NC sponsored the Cycle NC/Visit NC Excursions. These daily excursions offered the opportunity to take a break from the ride and experience more of North Carolina. This expands the impact of Cycle NC to additional towns and attractions.

## Esports

With our outstanding convention centers and arenas throughout the state, Esports hubs in vibrant cities like Raleigh and Charlotte, and our engaged, active gaming community, North Carolina has the facilities and the fans to make your next Esports event a success.

North Carolina's Esports incentive, a 25% rebate on qualifying Esports expenses and purchases while in-state, demonstrates our long-term commitment to the Esports community and industry.

The rebate is funded through the NC Esports Industry Grant, which currently has a designated amount of \$5 million available per fiscal year (July 1 – June 30).

SportsNC served as a liaison to both public and private groups in North Carolina. The Esports Industry Grant Program is administered by the Commerce Finance Center, a unit of the North Carolina Department of Commerce.

## International Marketing

In July of 2023 Visit NC discontinued our dedicated representative contracts in Canada, UK and Germany. While still continuing to market in these and several other countries, we work with Brand USA and Travel South USA to reach a larger audience in Canada, UK, Germany, Benelux, Brazil, France, Italy, Australia and the Nordics.

### Overseas Visitors

In 2023, North Carolina attracted 833,852 international visitors who spent an estimated \$894 million in the state. Canada, the U.K., India, Germany, China and Mexico were the top countries of origin to the state in terms of visitor volume. Other top countries of origin were Brazil, Australia, France, South Korea, Japan, Italy, Spain and the Netherlands.

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

Rank	Country of Origin	2023 Estimated Visitors	2023 Estimated Spending	Average Spending per Visitor
1	Canada	379,668	\$211,051,502	\$556
2	United Kingdom	51,525	\$79,624,403	\$1,545
3	India	43,037	\$66,397,487	\$1,543
4	Germany	40,146	\$57,899,771	\$1,442
5	China	22,901	\$48,626,410	\$2,123
6	Mexico	22,530	\$7,569,226	\$336
7	Brazil	19,346	\$40,982,670	\$2,118
8	Australia	15,348	\$33,847,379	\$2,205
9	France	13,839	\$18,485,769	\$1,336
10	South Korea	11,958	\$19,235,060	\$1,609

11	Japan	11,654	\$18,078,423	\$1,551
12	Italy	10,538	\$14,093,879	\$1,337
13	Spain	10,298	\$13,273,303	\$1,289
14	Netherlands	8,984	\$10,864,202	\$1,209
15	Sweden	5,928	\$7,915,592	\$1,335
16	Ireland	5,055	\$6,975,185	\$1,380
17	Singapore	4,915	\$9,667,827	\$1,967
18	Denmark	4,266	\$8,351,040	\$1,958
19	Argentina	4,264	\$6,433,737	\$1,509
20	Israel	4,143	\$5,019,267	\$1,211
	<b>Total</b>	<b>833,852</b>	<b>\$893,539,645</b>	<b>\$1,072</b>

*\*Tourism Economics, 2024*

#### **2024 U.S. Open promotion in the UK**

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

##### Campaign results:

Coverage in National Club Golf and Golf News. Digital campaign delivered 15 million impressions. Content in Wanderlust and the Independent exceeded 80,000 views.

#### **National Geographic Traveller UK**

Print and digital articles focusing on North Carolina's fisher folk and oyster farming.

Activation at the Nat Geo Food Festival in London. Chef Ricky Moore of Saltbox Seafood in Durham attended with us and served Oysters Pamlico and Pamlico Oysters Stew to more than 4500 attendees.

Results: Blog post had 14,426 views with a dwell time of 2:20. Social posts reached 13 million with CTR of .52%. 10 page print feature for Travel South in June reached 160,000 readers.

#### **Brand USA**

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

Other co-ops with Brand USA included:

- Programmatic content distribution with more than 2.1 million impressions 1.6 million video completions and a 77.96% retention rate.
- Global Inspiration Content renewal – Updates to the VisitTheUSA.com website on the NC pages. New content and photos.
- Custom Explore the South content in Canada East resulting in 3.5 million impressions, 2045 room nights booked and 285 flights at \$461,728 booking revenue.
- Custom Explore the South content in Germany with over 3 million impressions 165 room nights booked and 23 flights.

## Travel South USA

### Travel South Global Partnership Representation

In all markets, NC was featured in travel trade newsletters, trainings, and press releases throughout the year. Other co-ops include:

**Travelzoo campaign** The Sustainable South. NC's focus was on sustainable food production. Total reach between email, social and Travelzoo website equaled 5.9 million.

Canada – Baxter Media campaign designed to bring awareness to outdoor adventure. NC ranked in the top 3 of the 7 states participating with 55,704 impressions and 837 clicks.

**Australia** – Sales Mission to Melbourne, Brisbane and Sydney with 5 days of events with consumer, tour ops and media. In 2023 15,348 visitors came to NC spending \$33.8 million.

**Vacaay.com 2023** – Online inspiration travel site targeted at international travelers from Australia, New Zealand, Canada and the UK. This two month campaign yielded results of 30,947 clicks in ANZ (+24% above KPI), 36,843 clicks in the UK (+47% above KPI), and 28,329 in Canada (+13% above KPI)

**Hotelbeds 2023**- 65,992 room nights booked in 35 NC destinations featuring 1204 hotels in 2023. That's an increase of 57% over 2022. Campaign ran in US, Canada, UK and Germany.

### Tradeshows

- IPW in San Antonio with partners from Outer Banks, NOC, Charlotte and Raleigh
- Attended Travel South International Showcase in Memphis along with partners from Explore Asheville, Visit Charlotte and Visit Raleigh. Together NC met with more than 150 tour operators from 12 countries.

## Tourism Development

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

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

- Set goals for the Tourism Development Program and improved the delivery of information for the program on the Visit NC website. The effort is designed to make local communities more aware of resources within Visit NC as well as other opportunities for tourism development.
- Continued to research available resources in the form of grants, technical assistance and development (state, federal, private philanthropic).
- Made presentations to partners throughout North Carolina on Cultural Heritage Tourism Development and ways to work with Visit NC through its TRAC Program.

- Represented Visit NC in partnership the African American Heritage Commission.
- Continued to assist with the promotion of the Blue Ridge Music Trails of NC, Freedom Roads, US Civil Rights Trail, NC Civil War Trails, NC Civil Rights Trail and other products in the regions.
- Continued promotion of the NC Certified Retirement Community Program.
- Worked with communities in developing their Juneteenth Celebration events.

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

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

TRAC Sessions 2023 (Final Program Visits):

- TRAC sessions are in the final year and moving to a new program format. TRAC finished with (4) partners participating – Lumberton (Robeson Co.), Statesville (Iredell Co.), Concord (Cabarrus Co.), Wilkesboro (Wilkes Co.).

### **Consumer Show Attendance**

Visit NC led groups of in-state partners at two Consumers Shows in 2023:

1. Travel & Adventure Show DC – Partners (Greenville-Pitt County CVB, Onslow TDA, Johnston County Visitors Bureau, NC Zoo, Franklin & Nantahala TDC, Winston-Salem CVB, Boone TDA)
2. Travel & Adventure Show NYC – Partners (Greenville-Pitt County CVB, Pender County Tourism, DNCR, Johnston County Visitors Bureau, Winston-Salem CVB)
3. Travel & Adventure Show ATL – Partners (Boone TDA, NOC, Onslow TDA, Yadkin TDA, Winston-Salem CVB, DNCR)

### **Community Partnerships and Heritage Development**

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

## North Carolina Civil War Trails

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

- An updated Civil War Trails map has been printed and is available online and in all NC Welcome Centers.
- Visitors can download Civil War Trails maps from [www.VisitNC.com](http://www.VisitNC.com), receive map-guides via mail through the Call Center as well as in the state’s nine Welcome Centers.
- N.C. has 238 sites in 72 counties.

## Cultural Heritage Trails Development

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

## Certified Retirement Community Program

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

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

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

Visit NC continued to promote certified communities and areas of North Carolina during the Ideal Living Regional Expos in Long Island, NY; Parsippany, NJ: Greater DC are.

Results:

- 6890 leads generated.
- 264 packets mailed through the Call Center.
- 347 tracked moves to North Carolina in 2023.

**Visit North Carolina's certified communities include:**

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

## **Industry Relations**

### **Visit NC Tourism Conference –held in Asheville**

The 2023 Visit NC Tourism Conference was held in March in Asheville with enthusiastic reviews for the speakers, educational sessions and hospitality events. More than 550 attendees agreed it was wonderful to be able to gather again to discuss timely topics, network and also to welcome new faces to the industry. The conference's success is a credit to the Explore Asheville and Omni Grove Park Inn teams for ensuring every attendee's experience in Asheville was memorable.

### **U.S. Travel Association's Destination Capitol Hill**

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



## North Carolina Film Office (FilmNC)

2023 saw production numbers in the state greatly impacted by the work stoppage as a result of labor strikes within the industry nationwide. Despite the complete work stoppage for more than five (5) months, the state still saw a total of \$77 million directly spent by productions over the course of the calendar year. All told, 65 projects officially filed with the North Carolina Film Office, creating more than 7,200 job opportunities.

Here is a further breakdown of the projects:

2023 Total Production Estimates & Highlights\* from N.C. Film Office:

- 65 projects.
- \$77,950,774 direct spend by productions.
- 925+ production days.
- 7,278 jobs opportunities created.
  - 1,404 crew, 731 talent, 5,143 extras

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

Production highlights for 2023 include the following television, streaming, and feature film projects:

- Television/streaming series
  - “Untitled Josh and Lauren Project” – Wilmington Film Region (grant recipient)
  - “Tough Love with Hilary Farr” (Season 2) – Research Triangle Film Region
  - “Blue Ridge” (Season 1) – Charlotte Film Region (grant recipient)
  - “Love Is Blind” (Season 6) – Charlotte Film Region
  - “Outer Banks” (Season 4 – partial) – Wilmington Film Region (grant recipient)
- Feature films and made-for-television movies
  - “Zoey 102” – Wilmington Film Region (grant recipient)
  - “A Biltmore Christmas” – Western NC Film Regions (grant recipient)
  - “Summer Camp” – Western NC Film Region (grant recipient)
  - “A Bigger Piece of Sky” – Wilmington Film Region (grant recipient)
  - “Renner” – Eastern NC Film Region
  - “Operation Taco Gary’s” – Charlotte Film Region (grant recipient)

Additionally, national commercials for Dodge, Camping Workd, Alta Running Shoes, Air National Guard, GMC, Continental Tire, and Nutrilite Vitamins were filmed in the state as well the reality series “Artfully Designed” and a spin-off of the home makeover series “Good Bones” as well as several travel-related and real estate series.

2023 also saw regular desk visits return for FilmNC, with state film officials making official recruiting visits to the greater Los Angeles area four times during the year. Additionally, a new information brochure was produced which featured artwork commissioned by a local NC artist used to create a more interactive and attention-grabbing document.

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

Finally, FilmNC officials worked with local partners on the groundbreaking for Dark Horse Studios in Wilmington and aided in the expansion of the workforce development program in conjunction

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