

2017 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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2017 NC Travel and Tourism Board

Listed here is the Board for the year 2017 as required for the 2017 Annual Report. For information on the current board, please go to <https://partners.visitnc.com/travel-tourism-board-1>.

Sally Ashworth

Visit Lake Norman

Appointed By: Speaker of the House

Kevin Baker

Piedmont Triad International Airport

Appointed By: Senate President Pro Tempore

John Beatty

Summit Hospitality Group

Appointed By: NC Travel and Tourism Coalition

Rolf Blizzard

Turnpike Properties

Appointed By: NC Travel & Tourism Coalition

Mike Butts

Visit Charlotte

Appointed By: NCTIA

Christopher Chung

Economic Development Partnership of NC

Appointed By: Economic Development Partnership of NC

Secretary Anthony Copeland

NC Department of Commerce

Appointed By: NC Department of Commerce

Kevin Corbin

North Carolina House of Representatives

Appointed By: Speaker of the House

Robert Danos

NC Youth Camp Association

Appointed By: Senate President Pro Tempore

Richard Geiger

Winston-Salem CVB

Appointed By: DMANC

Joel Griffin

Griffin Stafford Hospitality, LLC

Appointed By: NCRLA - Lodging

Mike Hawkins

Pisgah Enterprise

Appointed By: Economic Development Partnership

Sen. Ralph Hise

North Carolina Senate

Appointed By: Senate President Pro Tempore

Rep. Patricia McElraft

North Carolina House of Representatives

Appointed By: Speaker of the House

Richard Moore

Timm's Furniture

Appointed By: Governor

Joe Pierce

Hornets

Appointed By: Governor

Tammy O'Kelley, Chair

Heart of North Carolina Visitors Bureau

Appointed By: Speaker of the House

Sen. Norman Sanderson

North Carolina Senate

Appointed By: Senate President Pro Tempore

Paula Wilber

The Biltmore Company

Appointed By: NCRLA - Restaurant

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."

2017: The Year in Review

North Carolina's tourism industry achieved record performance in 2017, with estimated visitor spending at an all-time high of \$23.9 billion in direct spending, a 4.2 percent increase over 2016. Spending by travelers directly supported more than 225,000 jobs for North Carolinians, setting yet another record. Additionally, payroll income generated \$6.0 billion. Visitor spending generated more than \$1.9 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 2017

Employment generated by domestic and international travelers in North Carolina increased 2.7 percent in 2017. These travel-related jobs comprised 5.3 percent of total non-agricultural employment in North Carolina during 2017.

Source: U.S. Travel Association

On an average day in 2017, visitors in North Carolina spent more than \$65 million and contributed more than \$5.3 million in state and local taxes.

Source: U.S. Travel Association

2017 represented a year of strategic evolution for Visit North Carolina's brand. Building upon successful mitigation of natural disasters and political and social controversy in 2016, Visit North Carolina recognized the opportunity and the need to better define its audience and reposition its brand for even more success moving forward. Following an awareness and usage study, combined with insights from primary and secondary research and data sources, Visit North Carolina shifted its audience definition from primarily demographic to psychographic, defining its core target as the *medium affinity, never-visited traveler* – which represents the highest opportunity for visitation and visitor spending based on the rate of repeat travel to the state. Articulating what is most motivating, differentiating and compelling to that audience, Visit North Carolina evolved its brand strategy from "Deeper Connections" to "Richer Experiences," where travelers feel and experience every moment to the fullest to truly feel more in touch

with themselves in North Carolina. Development and production of a new brand campaign followed in late 2017 for 2018 launch.

VisitNC.com ended 2017 with a record 7.29 million user sessions, a 6.11 percent increase from 2016. These sessions drove 2.02 million downstream web referrals and 62,739 phone calls to North Carolina industry partners.

Social media continued its growth in 2017, with followers across Visit NC Facebook, Twitter, Instagram, and YouTube channels reaching more than 324,000 followers, a 32 percent growth year-over-year. Paid social media is a powerful and efficient tool to support organic social traffic to VisitNC.com, and helped lead a 387 percent increase in social referral traffic, with more than 1.1 million sessions.

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

Arrivalist, the analytics tool through which Visit North Carolina tracks digital media efficiency in terms of generating arrivals in the state from online exposures, shows a 35.96 percent Arrival Lift since that metric launched April 1. This means being exposed to Visit North Carolina's tracked owned and paid digital media makes travelers 35.96 percent more likely to convert and arrive in market than control groups of similar travelers not exposed.

Proactive public relations efforts expanded Visit North Carolina's outreach to key audiences with a program that generated more than 221 million consumer impressions across the United States and 94 million consumer impressions internationally.

Cooperative marketing programs with NC travel industry partners and effective partnerships with in-state media associations resulted in an estimated \$8 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. The year saw the continuation and maturity of the state's rebate program, which is monetized by the recently created Film and Entertainment Grant. For the 2017 calendar year, productions were estimated to have had a direct in-state spend of more than \$57 million while creating in excess of 5,300 job opportunities including 2,135 for the state's well-trained crew professionals. Among the many 2017 highlights were the filming of season two of *Good Behavior*, the continuation of *Love It or List It*, season five of *A Chef's Life*, the third season of *Wicked Tuna: Outer Banks* and the fourth season of *My Big Fat Fabulous Life*. The critically acclaimed independent feature film *American Animals* also filmed in the state along with national commercials for Goodyear and Wendy's. 2017 also saw the spotlight shine brightly on the state's film industry with the release of the award-winning feature, *Three Billboards Outside Ebbing, Missouri* late in the year. This feature, which debuted at the prestigious Venice Film Festival and made its North American debut at the Toronto International Film Festival in September of 2017, garnered much media attention as it played multiple film festivals and received critical acclaim. *Three Billboards* would continue to garner international attention for the state into 2018 as it expanded into more markets worldwide and won numerous awards including the Golden Globe award for Best Picture.

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

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

Please review the balance of this Annual Report for more details on Visit North Carolina's 2017 program of work and accomplishments. Visit North Carolina continues to collaborate with partners statewide to ensure North Carolina's continued success and growth as a preferred travel, film and sports destination and positive economic force for the entire state.

2017 Results

Visitor Spending

In 2017, it is estimated domestic visitors to North Carolina spent a record \$23.9 billion in the state, an increase of 4.2 percent from 2016.

All of North Carolina's 100 counties experienced growth in visitor spending in 2017.

Domestic visitor spending directly supported 225,696 jobs for North Carolina residents and the tourism industry directly contributed \$6.0 billion to the state's payroll in 2017.

Traveler spending generated \$3.77 billion in federal, state and local tax receipts, an increase of 5.1 percent from 2016.

Mecklenburg County received nearly \$5.4 billion in domestic travelers' expenditures, the highest in the state. Wake County ranked second with nearly \$2.3 billion, followed by Guilford County with \$1.4 billion, Buncombe County with \$1.1 billion and Dare County with \$1.1 billion in visitor spending.

Polk County had the largest percentage increase at 8.3 percent followed by Hyde (8.2 percent), Henderson (7.1 percent), Pitt (6.6 percent) and Buncombe (6.6 percent) counties. Beaufort followed with a 6.4 percent increase. Forsyth (6.1 percent), Alamance (6.0 percent), Bertie (5.9 percent) and Pamlico (5.7 percent) counties rounding out the top 10 largest increases in 2017.

Positive spending growth was seen throughout the state's economic development regions. The Western (+5.1 percent) and Piedmont Triad (+4.9 percent) regions experienced the strongest growth, and all eight regions had spending growth of 3 percent or more.

Mecklenburg County had the largest direct employment in the tourism sector with 52,248 employees and the largest payroll at \$1.9 billion. Wake (23,417), Guilford (13,949), Dare (13,368) and Buncombe (11,786) counties each had more than 10,000 direct tourism employees.

Ninety percent of the state's counties saw direct tourism employment growth in 2017. The counties with the largest increases in direct tourism employment were the same counties setting the pace in visitor spending including Polk (+6.9 percent), Hyde (+6.8 percent), Henderson (+4.8 percent), Alamance (+4.6 percent), Pitt (+4.6 percent), Bertie (+4.5 percent) and Buncombe (+4.4 percent) counties.

Source: U.S. Travel Association

2017 Travel Volume

North Carolina person-trip volume was 46.1 million in 2017, ranking North Carolina No. 6 in total domestic person-trip volume.

Source: TNS Travels America

2017 Total State Rankings by Volume

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

Source: TNS Travels America

Average Trip Spending

North Carolina overnight visitor parties spent approximately \$738 per trip in 2017. Out-of-state visitors spent approximately \$903 per trip in 2017, while in-state resident travel parties spent \$467 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 \$895 per trip in 2017.

Source: TNS Travels America

Average Overnight Trip Duration

The average length of stay of North Carolina visitors was 3.4 nights in 2017. North Carolina resident visitors stayed an average of 2.7 nights, while out-of-state visitors stayed an average of 3.9 nights.

Total U.S. travelers stayed an average of 3.5 nights per trip in 2017.

Source: TNS Travels America

North Carolina's Top States of Origin for Overnight Visitors

- NC 39%
- VA 8%
- SC 7%
- GA 6%
- FL 5%
- NY 4%
- TN 3%
- OH 3%
- MD 3%
- PA 3%
- TX 2%

Source: TNS Travels America

NC's Activities for Overnight Visitors

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

While visiting friends and relatives and shopping are routinely mentioned every year among all travelers, exploring the state's scenic beauty, state and national parks, and rich cultural assets are among the most popular specific activities surveyed.

Source: TNS Travels America

Visit North Carolina Budget Overview

Marketing Media Purchase & Production	\$8,050,772
Personnel & Administration	\$1,129,862
Rent, Facilities and Computers (tech and licensing)	\$169,937
VisitNC.com Dev. & Maintenance (Interactive)	\$958,080
International Marketing (Canada, Germany, UK)	\$757,895
Film Office Marketing	\$336,565
Public Relations	\$542,348
Domestic Sales Promotion (Group and Sports)	\$264,035
Industry Relations	\$17,000
Research	\$644,289
RetireNC	\$50,600
TOTAL	\$12,921,483

North Carolina Visitor Services Budget Overview

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

Welcome Centers	\$2,160,371
Inquiry/Fulfillment	352,912
<hr/>	
Total	\$2,513,283

State Tourism Office Budgets: 2017-18

According to the U.S. Travel Association, North Carolina's budget of approximately \$12 million ranked 26th among state tourism office budgets in 2017-18, significantly behind several states that are direct competitors.

Budget Rank	State	Projected 2017-18 Budget	Budget Percent Change
11	Tennessee	20,380,000	+7%
12	Louisiana	19,606,910	+39%
13	Virginia	18,118,671	-3%
14	Alabama	18,053,316	+13%
18	South Carolina	16,241,731	+8%
23	Kentucky	13,316,400	+18%
26	North Carolina	12,604,944	+5%
35	Georgia	7,792,269	0%
41	Mississippi	5,207,317	+13%

**Film office spending and grants/pass-throughs not included in above budgets.*

As a result of the continued support and incremental funding from the General Assembly, 2017 brought the opportunity for enhanced advertising exposure for North Carolina and VisitNC.com through television and digital advertising buys.

Advertising

Print

Print advertising garnered 17,116,830 impressions for Visit North Carolina, with placements in several high-profile regional publications. Top-performing 2017 publications included *Garden & Gun*, *Outside Magazine*, *Coastal Living* and *Southern Living*. The campaign also delivered several local market ads within publications such as *Atlanta Magazine*, *The Washington Post Magazine*, *Nashville Lifestyles* and *Philly Magazine*.

Broadcast / Streaming TV

Television campaigns generating awareness for Visit North Carolina were featured in Atlanta, Washington, D.C. and Nashville, delivering more than 20 million impressions. Linear TV consisted of 1,277 spots airing on local cable networks such as *HGTV*, *Food Network*, *Lifetime* and *ESPN*. Streaming television, Hulu and NCC TV Everywhere, delivered 2,610,166 spots.

Paid Search

North Carolina's paid search efforts continued to be effective and efficient throughout 2017. 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 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 2017, the paid search campaign generated 620,234 clicks to VisitNC.com, 554,733 active sessions and a \$2.47 cost per activity.

Digital

Digital advertising continues to play a key role in all parts of the travel planning and decision-making funnel, and Visit North Carolina's digital media plan reflects that across awareness, site traffic and downstream conversion-driving tactics. In addition to constant optimizations across vendors and tactics, 2017 saw several key advancements in digital media:

- Paid Search: audit and refresh of Visit North Carolina's paid search campaign starting with Google's shift toward expanded text ads, resulting in significant immediate and year-long growth in click-through rate (approx. 7x), average position (from 3 to 1.5), conversion rate (72 percent higher), and cost per conversion (30 percent lower)
- Paid Social: increased paid social's share of digital media mix based on its high efficiency and effectiveness in driving quality site traffic and engagement, shifting from approximately 5 percent to 20 percent of digital media budget
- Display and Native: combined more consistent engagement with proven performers (like Quantcast for lookalike targeting display, Bidtellect for short form native site-driving content and TripAdvisor for travel mindset) with more campaign-specific initiatives with vendors like TravelZoo and WeatherBug for alignment with unique seasonal messaging and objectives, utilizing Arrivalist's Arrival Lift metric as a new measure of success across vendors and campaigns

Cooperative Programs

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

- *Atlanta Magazine*
- *Blue Ridge Country*
- *Charlotte Magazine*
- *Cleveland Magazine*
- *Coastal Living*
- *Columbia Metropolitan Magazine*
- *Country Living*
- *Family Fun*
- *Garden & Gun*
- *Good Housekeeping*
- *Jacksonville Magazine*
- *Midtown Magazine*
- *Nashville Lifestyles Magazine*
- *Orlando Magazine*
- *Our State*
- *Outside Magazine*
- *Philadelphia Magazine*
- *Richmond Magazine*
- *South Carolina Living*
- *Southern Living*
- *Tampa Magazine*
- *The TOWN*
- *The Washington Post Magazine*
- *Walter Magazine*
- *Woman's Day*

North Carolina Ski Areas Association

Visit North Carolina partnered again with the North Carolina Ski Areas Association on a cooperative marketing campaign promoting GoSkiNC.com, running December 2016 - January 2017. The campaign included cable and broadcast television in the following markets: Atlanta, Charlotte, Columbia, Greensboro/Winston-Salem, Greenville/Spartanburg/Asheville, Knoxville, Raleigh/Durham, Johnson City/Kingsport/Bristol and Jacksonville, FL. The campaign delivered more than 6 million impressions for the ski areas in these target markets.

VisitNC.com

Overview

As the state's official travel website, VisitNC.com hosted 7,289,141 user sessions, a 6.11 percent increase from 2016. VisitNC.com generated a total of more than 3.6 million key performance indicator actions in 2017.

VisitNC.com 2017 Key Performance Indicators

- 54,927 site visitors participating in **sweepstakes**
- 40,304 **Travel Guides** ordered from website
- 15,788 downloads of **virtual brochures**
- 706,435 page views of individual **trip ideas**
- 22,680 new subscriptions to **e-newsletters**
- 412,435 site **searches** performed
- 98,745 clicks to view online **travel publications**
- 2,004,700 **clicks to partner websites**
- 50,915 clicks to view **special offers**
- 188,290 on-site **video views**
- 62,800 mobile **phone calls**

Virtual Brochures

137 virtual brochures

9,379 downloads

Featured Event Listings

62 participating partners

155 total featured events

116,246 views of featured events

26,896 clicks to partner sites

Sweepstakes

10 participating partners/8 sweepstakes

55,783 total entries

Most Popular Homepage Sweepstakes

1. Feel the Pulse of Island Life this Spring in Wrightsville Beach (9,384 entries)
2. Beachside to Boardwalk: Family Fun in Carolina Beach Sweepstakes (9,068 entries)
3. Discover North Carolina's Beauty: The 2017 Travel Guide Sweepstakes (8,970 entries)

Paid Search

VisitNC.com

10,132,954 total impressions

620,234 total clicks

\$0.54 average cost-per-click

Family of Sites

Media.VisitNC.com

48,925 visits in 2017

1.43 average page views per visit

1:38 average visit duration

SportsNC.com

12,445 visits in 2017

1.99 average page views per visit

0:52 average visit duration

NCFilm.com

63,936 visits in 2017

2.21 average page views per visit

1:19 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 2017, Visit North Carolina hosted visits from more than 50 journalists from around the world and worked closely with numerous travel writers and reporters on stories involving travel to North Carolina. Earned media activities sparked hundreds of articles, blog posts and broadcast placements on North Carolina's travel experiences, generating more than 680 million consumer impressions domestically and internationally.

Other Highlights

U.S. Media Missions

The 2017 program year included strategic domestic media missions in New York, Washington, D.C., Charlotte and Atlanta. More than 143 editorial contacts were engaged with North Carolina story ideas from more than 107 destination partners from around the state. A sampling of top tier national and regional outlets hosted included: *CNN Travel*, *AFAR*, *Fodor's Travel*, *Travel and Leisure*, *Saveur*, *Glamour*, *Food Network Magazine*, *Conde Nast Traveler*, *Business North Carolina*, *Travelgirl* and more.

North Carolina Beer Month

North Carolina's craft beer community continues to be a booming industry with more breweries to experience than ever before. Building off of the success of previous North Carolina Beer Months in partnership with the Craft Brewers Guild, Visit North Carolina seized the opportunity and momentum by partnering with more than 100 breweries and creating more unique craft beer events for travelers to the state for the 2017 North Carolina Beer Month.

Visit North Carolina collaborated with Oskar Blues Brewery to create a VIP Weekend Sweepstakes which included tickets to the brewery's Burning Can Festival, a two-night stay in downtown Brevard, invitation to a brewer-only bike ride, dinners, tours and tastings. The sweepstakes received more than 5,100 entries and produced 874 travel guide requests.

This popular Visit North Carolina earned-media lead promotion continued the "Pint Hound Brewery Challenge" Passport created back in 2015. The passport program allows craft beer enthusiasts the opportunity to download a passport and collect stamps at participating breweries to claim beer-related prizes. This year's passport program yielded more than twice the response from the prior year with 565 passports being turned in at the end of the month.

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

NCBeerMonth.com Performance Summary:

- Featured more than 100 breweries, 85 events, 8 beer trip ideas and 14 travel deals
- 26,347 visits (58 percent from mobile/tablet) between March and April
- 8,690 downstream clicks with a 33 percent conversion rate (compared to 8,700 and 21 percent in 2016)
- 2:10 average time on page between March and April
- More than half of the traffic to the site came from North Carolina, while other visitors came from South Carolina, Georgia, Tennessee, Virginia, Pennsylvania, New York and Florida, among others

Earned/Sponsored Media Coverage:

- Covered in more than 96 articles and social media posts, generating 13,674,907 impressions
- Major players covering NC Beer Month included *DRAFT Magazine*, *Money Inc* and the *Atlanta Journal-Constitution*
- Successful launch of #PassThePint, a variety of social media posts showcasing NC Beer Month through the eyes of digital influencers and beer entrepreneurs throughout the state on the NC Brewers Guild Instagram handle

Untappd Results:

- March Badge received 182,057 unlocks (as compared to 185,136 in 2016) and ~4.8 million in social reach (as compared to ~5.6 million in 2016)
- April Badge received 182,403 unlocks (as compared to 183,899 in 2016) and ~4.5 million in social reach (as compared to ~5.4 million in 2016)

eNews Engagement:

- Distributed five NC Beer Month e-newsletters to the NC Beer Month list once every two weeks during the 2017 campaign
 - Subscriber list grew by 22.6 percent from the first e-newsletter to the last e-newsletter
 - Average open rate was 32 percent (compared to 26.9 percent in 2016), and average click rate was 6.3 percent (compared to 5.9 percent in 2016)
- Distributed one Oskar Blues VIP Weekend Sweepstakes e-newsletter at the end of April to the NC Beer Month List and the Visit NC Sweepstakes list (total of 26,477 subscribers)
- Sent to 12,500 subscribers, a 110 percent growth rate from the 2015 subscriber list
- Average open rate was 27 percent, and average click rate was 5.4 percent

#NCBeerMonth Social Media Results:

- More than 14,000 uses of #NCBeerMonth on Twitter in April, resulting in a reach of over 6 million and 14 million potential impressions
- More than 1,800 uses of #NCBeerMonth on Instagram in April, resulting in a reach of 1.2 million and 5 million potential impressions

Pint Hound Passport Results and Feedback:

- Received a total of 565 passports (as compared to 205 in 2016)
- 119 people got 5-14 stamps, 317 people got 14-29 stamps, 100 people got 30-44 stamps, and 29 people got 45 or more stamps

Oskar Blues VIP Weekend Sweepstakes:

- Period: March 1 – April 30, 2017
- 5,100 entries (as compared to 1,970 entries in 2016)
- 874 Travel Guide requests and 325 partner information requests
- Resulting eNews subscriptions: 689 Beer Month, 457 Events, 390 Travel Deals/Offer, 114 Golf

In-State Marketing Initiatives

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

North Carolina Association of Broadcasters

Member television and radio stations aired 67,678 spots representing a value of \$5,033,969.

North Carolina Press Foundation

One hundred sixty-six papers published 2,045 ads representing a value of \$1,083,000.

UNC-TV

UNC-TV's award-winning team produced 52 weekly episodes of its popular show *North Carolina Weekend* during 2017. Each episode was broadcast statewide ten times weekly over three of UNC-TV's program services: UNC-TV, The Explorer Channel and the North Carolina Channel. North Carolina Weekend aired more than 605 times during the year reaching more than 9 million viewers. The 49 airings on Thursday nights alone averaged a .66 rating, reaching 2.3 million viewers, and the 429 airings on UNC-EX and The NC Channel reached 4.4 million viewers. The series featured more than 220 destinations, attractions and events across the state.

Visitor Services

North Carolina's nine Welcome Centers hosted **9,424,239** visitors in 2017. A breakout of the number of visitors by Welcome Center location is below:

2016 Welcome Center Estimated Visitors	
I-95 S	1,164,079
I-95 N	1,622,183
I-85 S	1,293,721
I-85 N	425,278
I-77 S	350,864
I-77 N	1,078,439
I-40 W	1,814,881
I-26 W	299,060
I-26 E	1,375,734
Total:	9,424,239

The I-40 West Welcome Center was the most visited in 2017, hosting 1,814,881 travelers. Welcome Centers registered nearly 10,000 visitors from other countries, including 6,800 from Canada and from six of seven continents.

In 2017, Welcome Centers booked about 19,200 room nights, representing total revenue of nearly \$2 million at an average rate of \$102.47 per room night.

Inquiry/Call Center

In 2017, Visit North Carolina received 3,658,019 inquiries, mailed 189,215 *NC Travel Guides* to potential visitors and answered 7,780 calls on 1-800-VISIT-NC.

Publications

The Official 2017 North Carolina Travel Guide

The result of work throughout 2016, Visit North Carolina worked with Meredith Publishing, Inc. to produce the *Official 2017 North Carolina Travel Guide* to serve as Visit North Carolina's primary fulfillment piece for potential visitors to and within the state. For the first time the "Official North Carolina Travel Guide" used three different covers to reflect the diverse natural beauty found in the state's mountain, Piedmont and coastal regions.

The coastal cover captured Hayes Bridge, a wooden structure that crosses Queen Anne Creek to a historic plantation on the Edenton waterfront. From the Piedmont, the cover depicts mountain bikers on a winding trail at Lake Norman State Park near Mooresville. The mountain cover shows Looking Glass Rock, a Brevard-area destination for hikers and rock climbers. Each cover of the 2017 Travel Guide represents a sweepstakes offering a weekend getaway as the prize. Included inside the 164-page guide, 900 attractions, nearly 3,200 accommodations and campgrounds, and curated content with vibrant photos and text blocks provided travel resources in every county. Travel planners find assistance from one of the guide's new features: a two-page map with major roads, bodies of water, parks, cities and towns.

The 2017 Travel Guide, the official guide for North Carolina's state tourism office, was produced by Meredith Travel Marketing. It was financed by private industry support with more than \$750,000 in advertising in the 500,000 printed copies and digital editions. Listings for the 900 attractions and 3,200 accommodations and campgrounds were provided for free. The self-mailer format for printed copies reinforces the green initiatives of Visit North Carolina as part of the Economic Development Partnership of North Carolina.

NewsLink

Emailed weekly to 4,943 subscribers, *NewsLink* is an electronic publication designed to provide information to the tourism industry. The mailing list also includes legislators, economic developers and media. In 2017, *NewsLink* covered 729 stories within the 51 weekly and four "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. It is only sent to those who have requested to receive the newsletter.

Domestic Marketing

American Bus Association (ABA) Marketplace, January 2017, Cleveland, OH

ABA Marketplace is one of the premier industry events for the group travel industry, allowing travel 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 2017 Marketplace, Visit North Carolina:

- Teamed with 10 in-state partners to host tour operators for dinner.
- Conducted 37 appointments with tour operators during the week, promoting group travel throughout the state.

Travel South Showcase, March 2017, Branson, MO

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 18 travel industry partners and conduct strategic, business development meetings.
- Met with 30 domestic tour operators, focusing on what's new with the state's tourism products and on North Carolina's position as a travel destination market leader.

2017 Annual Blue Ridge Parkway Familiarization Tour

In April, Visit North Carolina partnered with Virginia and Tennessee in hosting a seven-day tour of the Blue Ridge Parkway with 27 AAA representatives from across the United States. Several days were spent with group in all areas of North Carolina's mountain region.

Student and Youth Travel Association, August 2017, Albuquerque, NC

For the first time in several years, Visit NC attended the SYTA Annual Conference, the premier event for the student and youth travel industry. The SYTA Conference is the only conference and showcase dedicated to the student and youth market in North America. Visit NC conducted 22 one-on-one meetings with student and youth travel buyers promoting NC as a destination.

Virginia Motorcoach Association, North Carolina Motorcoach Association and South Carolina Motorcoach Association Regional Meeting

Visit NC and 20 NC tourism partners attended the VMA, NCMA and SCMCA regional meeting held in Roanoke, Virginia. Visit NC met with 23 tour operators promoting group travel to NC.

Sports

Connect Marketplace, August 2017, Grapevine, TX

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

TEAMS Conference, October 2017, Orlando, FL

Visit NC and the SportsNC delegation attended and sponsored the annual TEAMS (Travel, Events And Management in Sports) Conference & Expo in Orlando, FL, Oct. 30-Nov. 3. The SportsNC team participated in more than 45 prescheduled appointments during the conference. TEAMS is one of the premier trade shows for sports planners to meet with destinations and sports organizations to conduct business as well as learn about industry trends and best practices related to sports.

2017 Cycle NC Excursions

Visit NC has sponsored Cycle NC for several years. For the second year the two partnered together to offer daily Cycle NC/Visit NC Excursions for the Mountains to the Coast Ride. These excursions give participants and their families the opportunity to take a break from the ride and experience the state, while expanding the economic impact of the MTC ride. Daily excursions visited 12 different counties, and each day brought positive feedback from the participants on their experiences.

Mountains to Coast Ride

- September 30 – October 7, overnight stops in Jefferson, Elkin, Oak Ridge, Chapel Hill, Knightdale, Wilson, Kinston, Swansboro
- Participation: 960 cyclists
- U.S. States Represented: 39 (plus D.C., Canada and Germany)
- Average Age: 58
- Oldest Rider: 86
- Youngest Rider: 8
- Male/Female Ratio: 73 percent / 27 percent

International Marketing

Canada

- Multiple daily non-stop flights to Charlotte Douglas and Raleigh-Durham airports.
- No. 1 international market with 388,500 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 \$217 million.

Cooperative Marketing & Advertising Opportunities

Brand USA participated in the spring multichannel initiative. The campaign included a one-page ad circulated through several major publications in Canada (digital and print), social amplification via Brand USA's social channels, co-branding through Expedia's Discover America landing page and guaranteed clicks through Google display network.. Total impressions: 2,453,099. Bookings on Expedia in Canada were 42% higher YOY following the campaign.

680 News

Launched a one-week contest in September on a major Toronto radio station targeting Greater Toronto residents who commute to work every day. Built a compelling giveaway highlighting the amazing accommodations, culture and culinary scene available in the Piedmont region and positioned Raleigh and Winston-Salem as perfect weekend escapes. In addition to radio exposure, the 680 News insider club was a great opportunity to engage more than 250,000 680 news listeners through the online loyalty program. Total entries: 1,273. Winston-Salem and Raleigh each received nearly 200 new web subscribers.

Travel Alerts

Visit North Carolina's Canada office launched a one-month fall campaign with Travelalerts.ca, a leading digital travel resource for Canadian consumers. The campaign included multiple e-blasts, display advertising, social media posts and a national contest (promoted in English and French). The contest led to 4 million impressions across the network and 12,834 unique entries in the contest.

Product Familiarization Trips

Two product FAM participants, Sportvac Voyages (PGA TOUR) and Tour East (Travel South)

Sales Missions and Trade Shows

The Canadian Sales Mission was held in Toronto and Montreal in April 2017. The mission included six high value meetings, four trainings and two networking events. For the first time we participated in the Travel Brands roadshow – reaching more than 400 travel brands agents across the greater Toronto area.

Montreal International Travel & Tourism Show

Participated in the International Travel & Tourism Show in Montreal, October 18-22, which included an industry luncheon (40 trade and media) followed by the three-day consumer show. The team showcased NC with a consumer engagement quiz and partnered with Ford's Foods on Bone Suckin' Sauce prizes.

Toronto Outdoor Adventure Show

Visit NC exhibited at the Outdoor Adventure Show in February, reaching some 25,000 outdoor enthusiasts. The team created a social media contest around "my dream adventure," which generated more than 200 posts.

Toronto National Women's Show

Participated in 2017 show and was a great opportunity to engage a targeted audience of female consumers. Attendees were invited to engage with an interactive green screen booth experience complete with iconic North Carolina backgrounds and social media content. The team obtained 75 North Carolina opt ins and several trip leads.

Canadian Public Relations Results

- Attended Discover America Day (12 scheduled media appointments) + Travel Media Association of Canada Conference (17 scheduled media appointments).
- Canadian PR Mission – met with 49 top tier media in Toronto and Montreal (resulting in several press trips throughout 2017-2018 and coverage opportunities for partners).
- Placements generated a total reach of more than 39 million impressions.
- Hosted 13 journalists from consumer publications.

Overseas Visitors

In 2017, North Carolina attracted nearly 900,000 international visitors who spent an estimated \$1.1 billion in the state. Canada, the U.K. and Germany were the state’s top countries of origin for visitor volume. Other top countries of origin were China, Mexico, India, Japan, France, Brazil and Australia.

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

Rank	Country of Origin	2017 Est. Visitors	% Change from 2016	2017 Total Spent	% Change from 2016	Avg Spending per Visitor
1	Canada	388,500	+5.3%	\$217m	-1.4%	\$559
2	United Kingdom	76,200	+2.0%	\$128m	+1.4%	\$1,680
3	Germany	50,600	+8.6%	\$74m	+7.9%	\$1,462
4	China	36,300	+9.2%	\$102m	+6.9%	\$2,810
5	Mexico	24,900	-3.6%	\$12m	-1.6%	\$482
6	India	24,700	+2.6%	\$57m	-3.2%	\$2,308
7	Japan	20,300	+1.7%	\$41m	-5.6%	\$2,020
8	France	17,100	-3.9%	\$22m	-3.6%	\$1,236
9	Brazil	13,700	-0.3%	\$33m	-0.7%	\$2,409
10	Australia	12,300	+5.0%	\$23m	+4.5%	\$1,870
11	South Korea	11,000	+12.2%	\$24m	+5.3%	\$2,182
12	Spain	10,200	+6.3%	\$11m	+4.9%	\$1,078
13	Italy	10,200	+5.2%	\$14m	-1.4%	\$1,373
14	Sweden	8,400	+5.0%	\$10m	+5.3%	\$1,190
14	Ireland	6,800	+4.6%	\$9m	+4.7%	\$1,324
15	Denmark	5,800	-1.7%	\$14m	0.0%	\$2,414
Total		863,200	+5.1%	\$1.1b	+3.4%	\$1,274

U.K. and Ireland

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

- Two daily non-stop flights to Heathrow.
- Seasonal service to Dublin, Ireland.
- No. 1 overseas market with 83,000 visitors.
- These visitors spent \$137 million.

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 on a co-op that featured NC:

- Destination of the month on AAYLI home page
- National press advertising, with a lead in fly-drive package call to action
- Digital online targeted campaign for one month
- E-shot with NC fly-drive itineraries sent to database of approx. 14,000 clients
- Special offers on NC products created for website
- Special offers and promotion on Facebook and Twitter
- Blog posts on website highlighting special offers for NC destinations

Results:

- 587,628 impressions on the website and 4652 web hits
- E-shot had a 22% open rate with 15% click through
- Room nights booked from the campaign: 387 room nights and 136 passengers

Sales & Marketing Accomplishments

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

- Abercrombie & Kent
- America As You Like It
- Audley Travel
- Bon Voyage
- Platinum Travel
- SAGA Holidays
- USAirtours

Summary of U.K. Meetings and Trainings

- 139 Trade Meetings
- Twelve Airline Meetings (American Airlines, British Airways, Delta Air Lines & Virgin Atlantic)
- Three Brand USA meetings
- Travel Agent Training Events

- Tour Operator Trainings
- Increased the number of operators featuring North Carolina
- Visit North Carolina participated and had a stand at the annual Travel Counsellors 2017 conference, an opportunity to be in front of more than **1,000** homeworking travel agents.

Trade Shows

- Visit North Carolina (U.K. & Ireland) were present at IPW 2017 in Washington.
- Visit North Carolina joined other Travel South USA states exhibiting at WTM London.
- North Carolina was present at the Visit USA UNITE Tour Operator day where **15** one-to-one meetings with product managers occurred.
- The U.K. & Ireland Office attended TravelSouth International in Charleston to support the large U.K. & Ireland delegation.
- The U.K. & Ireland office attended the 365 Conference, a great opportunity for them to meet and network with the team from various areas of the state, pickup new information and make new contacts.

Consumer Shows

- Visit North Carolina participated in the Visit USA Pavilion at the Destinations Consumer shows in Manchester and London, these being held in the key planning months of January and February.
- Visit North Carolina participated at the Holiday World Consumer Show in Dublin, Ireland, held in January 2017.
- In excess of **720** maps and guides were distributed across the three shows.

Sales Missions

Visit North Carolina was part of a Tri-State Sales Mission with Georgia and South Carolina to the U.K. which took place in July 2017. Meetings, trainings and events were scheduled with key operators in and around London and the home counties.

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

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

Familiarization Tour

The post IPW FAM took place in June and incorporated a different dynamic for the arrangements by including Amtrak from Washington to Rocky Mount where we transferred the guests to the Outer Banks. The group included U.K. tour operators, a specialist vacation homes receptive and a travel trade journalist.

The itinerary gave all attendees the opportunity to see coastal and urban North Carolina and to experience different aspects of the state. Throughout the trip participants were impressed with the natural beauty of NC, the laid-back atmosphere, easy access to iconic American experiences, the sophistication of the food scene and urban areas.

New Product

North Carolina U.K. and Ireland operators have increased product across the U.K. & Ireland Tour Operators, and this includes a new tour from SAGA Holidays.

The opportunity for U.K. operators to promote and sell villa / home rentals on the Outer Banks to U.K. consumers came to fruition and this was heavily promoted in 2017. Additionally, this was further enhanced to also include self-catering product in both Raleigh and Charlotte.

U.K. Public Relations Results:

- Individual media familiarization tours took place focusing on the various areas and activities of the state and included a mix of activities and interests.
 - Visit North Carolina hosted **five** journalists on familiarization tours over the course of 2017.
 - **109** placements with a total reach of more than **2.2 billion** impressions.
- Coverage was across all media channels including trade and consumer publications, online outlets and radio.
- U.K. & Ireland coverage was statewide from Asheville through to the coast.
- As part of the Sales Mission a radio day was arranged which included **16** interviews across key U.K. Radio Stations with a reach of in excess **3.34 million** listeners.
- Visit North Carolina was represented at key media events during the year, including Visit USA Meet the Media, TravMedia & British Guild of Travel Writers events.

Germany

- No. 2 overseas market with 50,600 visitors to North Carolina
- Visitors spent \$74 million
- Supporting two daily non-stop flights from Munich and Frankfurt to the state
- In 2017, 2.1 million Germans traveled to the U.S.

Sales and Marketing Accomplishments

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

Roadshows

VUSA Switzerland: On behalf of Visit North Carolina we participated in the VUSA Switzerland roadshow from September 25 – 29, 2017 (we trained 250 travel agents in total on North Carolina).

Lonely Planet Campaign

Visit North Carolina conducted an online marketing campaign for consumers on Lonely Planet.de partnering with Explorer Fernreisen as the call to action partner. LP created extensive content for users

on the website, users filled in a questionnaire and received a personalized North Carolina itinerary based on their answers. Explorer created five new NC itineraries for the campaign.

Results:

- 22,885 visits (instead of 15,000 as expected)
- The duration of staying on the page with 1 min, 32 sec. On the travel magazine the visit during was 4 min 19 sec; 3,946 people participated in the raffle.

CRD

In cooperation with South Carolina and Georgia, Visit North Carolina did an online campaign called “100%-online campaign:” a dedicated microsite with different modules plus social media activities and newsletter inclusion in February 2017.

Results:

- Newsletter: 64,013 recipients
- Facebook page: Reach 1,982
- Instagram account: 49 likes
- 2016: 381 room nights

Canusa

Visit North Carolina conducted an Out of Home campaign with Canusa Touristik where 150 metro posters with an NC image were displayed throughout Munich for two months.

Results:

- Increase in bookings: 2.5 %
- 2016: 8,700 room nights (+6% in comparison to 2015)

Sales Mission

November 2017 – Accomplished trainings for tour operators and travel agents as well as sales meetings in Frankfurt, Hamburg and Zurich. Conducted a small after-work media event in Zurich.

Consumer & Travel Trade Shows

- Attended ITB in Berlin with the Travel South region
- NC brochure distribution at f.r.e.e Munich, CMT Stuttgart and Reisen Hamburg
- ABF Hanover – daily presentation to consumers on NC
- VUSA Austria Seminar including a 15 min presentation on NC

German Public Relations Results

- Organized five individual media FAMs
- Conducted media calls in Frankfurt, Hamburg and Zurich with an afterwork media cocktail in Zurich – November
- Placed advertorial about North Carolina’s natural wonders in the magazine *Imagine (CH)*
- Placed advertorial and delivered editorial content in *TIP exclusive USA 2017*
- Cooperated with *travelews.ch* on North Carolina online Banners linking to *visitnc.com*
- 368 placements with a total reach of more than 10.571 billion impressions

Social Media Results

Facebook: Reached 81,764 with 4.445 engagements

Other International News

Visit North Carolina and other statewide partners attended the Travel South International Showcase in Charleston, SC. Nearly 100 international tour operators from 12 countries met with North Carolina CVBs, attractions and hotels to increase interest in international visitation to North Carolina. Visit NC hosted three post FAMs for tour operators, including the Chinese-only FAM.

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

IPW

Visit North Carolina hosted a double North Carolina booth at the U.S. Travel Association's IPW in Washington, D.C. Visit Charlotte, Explore Asheville, Biltmore and Outer Banks Visitors Bureau joined the state in more than 85 trade and media appointments. Following the tradeshow Visit NC along with partners in the Outer Banks hosted three tour operators and a journalist for a familiarization tour.

PGA Familiarization Tour

Visit NC and South Carolina Dept of Parks, Recreation and Tourism held a joint familiarization tour around the PGA in Charlotte. Nineteen tour operators and journalists from five countries visited Pinehurst Resort, Gaston Country Club and Ballantyne along with attending the PGA.

WeChat in China

Visit North Carolina has a weekly post on WeChat in China.

Brand USA Co-op Marketing Programs

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

In 2016 we participated in the following programs:

- Road Trip Ideas – presented five different trips around NC to live on the VisitTheUSA.com website
- Inspiration Guide – 575,000 printed USA guides translated into 10 languages for distribution in 20+ countries
- Multichannel Campaigns in U.K., Canada and China – aimed at both print and digital mediums with built-in online booking

Tourism Development

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

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

- Set goals for the Tourism Development Program and improved the delivery of information for the program on the Department of Commerce website. The effort is designed to make local communities more aware of resources within Visit North Carolina as well as other opportunities for tourism development.
- Gathered information for Visit North Carolina's film office, public relations, domestic marketing and international marketing programs.
- Continued to research available resources in the form of grants, technical assistance and development (state, federal, private philanthropic).
- Made presentations to partners throughout North Carolina on Cultural Heritage Tourism Development and ways to work with Visit North Carolina.
- Represented Visit North Carolina during the African American Heritage Commission planning meetings.
- Continued to assist with the promotion of the Blue Ridge Music Trails of NC and other products in the region.
- 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 Relations Manager to bring Visit North Carolina's program managers to local communities to share and discuss the nuts and bolts of partnering effectively with Visit North Carolina.

TRAC sessions through 2016:

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

2017

19. Dunn – Harnett Co.
20. Troy – Montgomery Co.
21. Marion – McDowell Co.
22. Creedmoor – Granville Co.
23. Mount Airy – Surry Co.
24. Washington – Beaufort Co.

Consumer Show Attendance

Visit NC participated in five Consumers Shows in 2017, working with Tourism Partners:

1. Travel & Adventure Show DC – Partners (OBX)
2. NY Times Travel Show – Partners (Reynalda House, Fearington, Crystal Coast Lady Cruises/Island Express Ferry)
3. AAA Show Columbus, OH
4. Boston Globe Travel Show
5. Travel & Adventure Show Philadelphia – Partners (OBX, New Bern, Johnston Co.)

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 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 collaborated closely with the communities participating in the NC STEP Program through the NC Rural Center and the NC Main Street Program.

Appalachian Regional Commission (ARC)

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

North Carolina Civil War Trails

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

- An updated Civil War Trails map has been printed and is available online and in all NC Welcome Centers.
- Visitors can download Civil War Trails maps from www.VisitNC.com, 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 promotion of the Blue Ridge Music Trails, partnering with the Department of Natural & Cultural Resources, NC Arts Council, BRNHA and other communities in the region.
- Assisted in the promotion of the Blue Ridge Craft Trails.
- Worked with Department of Natural & Cultural Resources in the development of the African American Music Trail in the counties of Onslow, Lenoir, Craven, Pitt, Edgecombe, Wilson, Wayne and Greene.
- Worked with the African American Heritage Commission in the development of “Freedom Roads” Underground Railroad Heritage Trail, and also collaborated with the Gullah Geechee National Heritage Corridor.
- Continued to work with the NC Folklife Institute to promote the traditional arts of 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 panopoly of quality living the state offers and established the N.C. Certified Retirement Community Program (S.L. 2008-188) as a vehicle to designate communities offering this unprecedented quality of living sought after by the mature community.

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

- Visit North Carolina worked with the Community Assistance office to administer and review applications.
- Visit North Carolina's Tourism Development Manager continued to make presentations to local County Commissions and City Managers on the guidelines, requirements and benefits of the program to increase participation.
- Visit North Carolina continued to attend conferences on trends, research and developing retirement communities, and serves on the Board of Directors for the American Association of Retirement Communities (AARC).
- Visit North Carolina continued to promote certified communities and areas of NC during the Ideal Living Regional Expos in Long Island, NY; Bridgewater, NJ; Greenwich, CT and (2) Washington, D.C.

Results:

- 4,095 leads generated
- 1705 packets downloads from retirenc.com
- 1,095 packets mailed through the Call Center
- 2,869 moves to NC from Jan. 2015 – Mar. 2017 – (198 in 14 CRC counties)
- 101 moves from Apr. 2017 – present (48 are out of state moves; 52 NC-NC moves)

Visit North Carolina's certified communities include:

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

2017 CRC additions

16. Washington
17. Roanoke Rapids

Industry Relations

Visit NC 365 in Greenville (March 5-7)

Visit North Carolina's annual conference for the state's travel and hospitality industry was held at the Greenville Convention Center and featured dynamic educational programming and valuable networking opportunities. The 2017 Winner's Circle Awards were also presented and recognized distinguished North Carolinians for their contributions to the growth and success of the state's tourism industry. Honorees for 2017 included Jean Beasley, Jim Early and A.C. Hall.

Tourism Week in Raleigh (May 7-13)

Gov. Cooper proclaimed during North Carolina Tourism Week the travel industry had a record impact on the state's economy in 2016, with \$22.9 billion in direct visitor spending generating more than 218,000 tourism employment jobs. In addition, state tax receipts as a result of visitor spending rose to nearly \$1.2 billion.

Visit North Carolina joined the N.C. Travel & Tourism Coalition, the N.C. Travel Industry Association, and other industry partners in Raleigh to emphasize the economic benefits of tourism throughout the week. The team met with legislative representatives and hosted 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 2017)

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

Sports Development

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

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

North Carolina Film Office (FilmNC)

The North Carolina Film Office (FilmNC) and regional film commissions promoted filmmaking in North Carolina at the annual Association of Film Commissioners International's (AFCI) Locations Trade Show and Conference and made several sales calls to the West Coast. In 2017, FilmNC was once again promoting the state at the annual Sundance Film Festival in Park City, Utah, and returned to both the South by Southwest Film festival and Conference and the Toronto International Film Festival for the first time in five years. FilmNC also made its inaugural appearance at the FOCUS conference, one of the premier film and production tradeshow in Europe.

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

The year also saw substantial enhancements to the continuation and growth of the state's new rebate program, which is funded through the Film and Entertainment Grant. The grant funds were designated as "recurring" in the budget and raised to \$31 million per fiscal year. Legislation was also passed that eliminated the program's sunset date. These two factors should play a key role in the success of the program as it helped to re-establish the state's long-term commitment to the industry.

Finally, 2017 also saw the debut of the highly anticipated NC-filmed feature film "Three Billboards Outside Ebbing, Missouri." Both the NC Film Office and VisitNC began promoting the state as the film's home when the feature made its North American debut at the Toronto International Film Festival and continued to promote the state's tie-in with the feature during its award season run to both the film and entertainment industry as well as to potential visitors looking to see where the feature film was made, including developing a travel itinerary highlighting both filming locations used as well as local businesses visited by the production team. These efforts carried into 2018.

2017 Total Production Estimates & Highlights from N.C. Film Office:

- 124 projects
- \$57,284,944 direct spend by productions
- 811 production days
- 5,329 jobs created
- 2,135 crew, 671 talent, 2,523 extras

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

Highlights of film projects during 2017 include:

- *Good Behavior* (Season 2) – Wilmington Region (grant recipient)
- *Wicked Tuna: Outer Banks* – North Eastern Region
- *A Chef's Life* (Season 5) – Eastern Region
- *My Big Fat Fabulous Life* (Season 4) – Piedmont Triad Region
- *Love It or List It* (NC Season 2) – Research Triangle Region (grant recipient)
- *American Animals* – Charlotte Region (grant recipient)
- *Toymakerz* (Season 2) – Piedmont Triad Region
- National commercials for Home Depot (grant recipient), Wendy's and Goodyear