

# VISIT NC UPDATE

Tourism Leadership Conference  
NC Travel Industry Association  
November 6, 2025



## AGENDA

- 2024 Visitation
- 2025 So Far...
- Hurricane Recovery
- Shutdown
- Campaigns and Activities

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## 2024 RECORD LEVEL IMPACTS

- More than **39 Million** visitors
- **\$36.7 Billion** in Visitor Spending (+3.1%)
- More Than **230,000 Jobs** (+1.4%)
- **\$1.4 Billion** in State Tax Revenues (+1.1%)
- **\$1.3 Billion** in Local Tax Revenues (+4.3%)

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Source: OmniTrak- TravelTrak America, Oxford Economics -Tourism Economics 2025

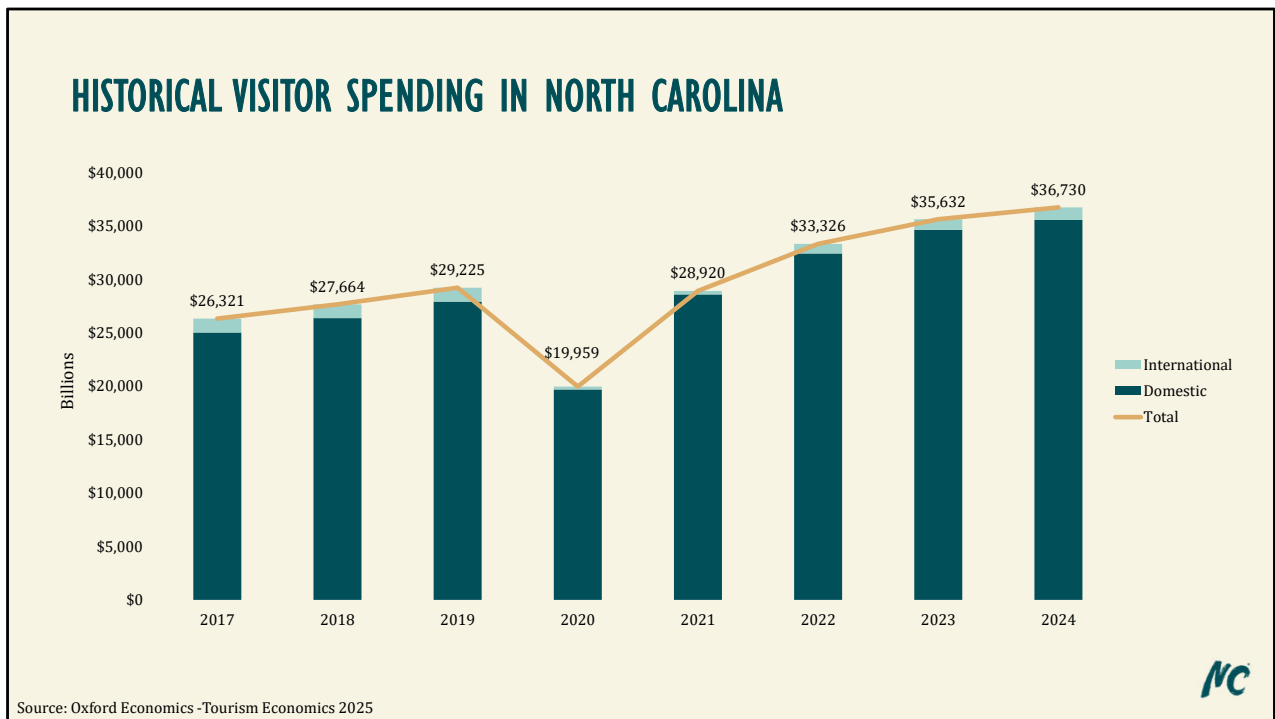


To quantify the level of visitor activity in North Carolina, working with Tourism Economics, the Visitor Activity Model combines a number of data that looks at tourism from different angles to understand visitor economic contributions. The data provides insights from the visitor, local industry and government perspectives to pinpoint the travel sector in direct visitor spending, as well as its direct economic impacts, jobs, and fiscal (tax) impacts in the broader economy.

In 2024 we saw another record-breaking year for visitor spending with more than \$36.7 billion spent within the state, a 3% increase from 2023.

Tax receipts also hit record levels with \$2.6 billion in state and local tax receipts. These dollars are contributed directly into the local and state government coffers by way of sales taxes, occupancy taxes and other taxes and fees.

While employment still isn't back to pre-pandemic levels, the 1.4% growth pulled it closer to the previous record set in 2019. It is about 3.4% below that record level employment.



**LAST UPDATED:** May 2025 (Yearly)

The North Carolina tourism economy reached its highest level ever with travelers spending more than \$36.7 billion on trips to and within the state.

International spending, while not yet back to record levels, did cross the \$1 billion mark in 2024.

## COUNTY LEVEL VISITOR SPENDING 2024

- 69% of counties had increased spending from 2023-2024

Rank	County	% Increase	Tier
1	Cleveland	14.0%	2
2	Burke	11.9%	2
3	Iredell	11.9%	3
4	Stokes	11.5%	2
5	Union	11.1%	3
6	Gaston	10.3%	2
7	Ashe	10.0%	2
8	Lincoln	9.8%	3
9	Lee	9.5%	2
10	Mecklenburg	8.9%	3

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- 62% of counties had increased direct tourism employment from 2023-2024

Rank	County	% Increase	Tier
1	Stokes	8.8%	2
2	Burke	7.6%	2
3	Gaston	7.0%	2
4	Union	6.7%	3
5	Ashe	6.2%	2
6	Chatham	6.0%	3
7	Beaufort	5.9%	1
8	Pender	5.6%	3
9	Iredell	5.5%	3
10	Moore	5.2%	3

NC

In 2024, the top 10 counties for visitor spending growth and employment are listed here and are a mixture of tier rankings.

Of the top 10 for spend growth 60% were tier 2 and 40% were tier 3.

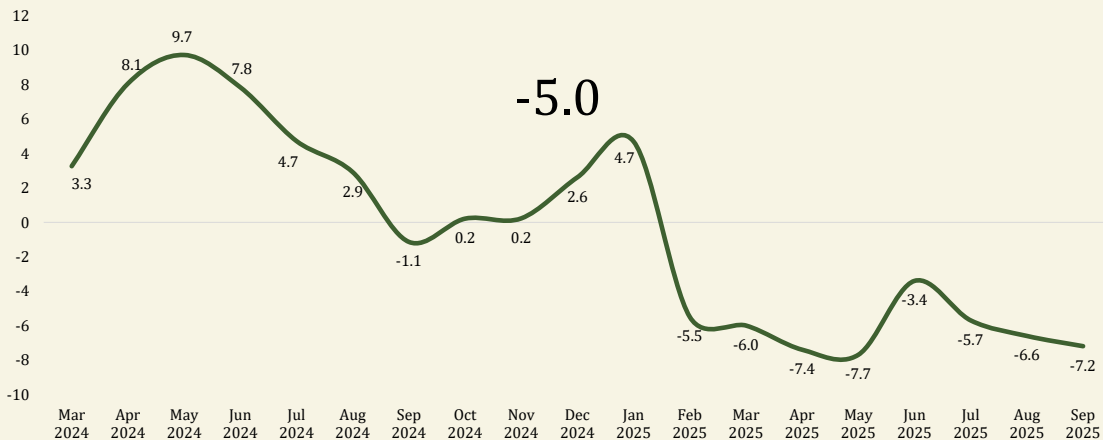
Of the top 10 for employment growth, 10% were tier 1 and 40% were tier 2 and 50% were tier 3.

Despite employment not yet reaching record levels, several counties has double-digit increases in employment in 2023 as compared to 2022

**2025 YEAR-TO-DATE THROUGH SEPTEMBER**

*NC*

## VISITOR ECONOMY INDEX - MONTHLY



Visitor Economy Index is comprised of commercial lodging demand and revenues, AirDNA demand and revenues, available credit card data and visitor device counts  
Source: Zartico 2025



The Year-to-date visitor economy index shows that the health of the tourism economy in NC remains negative since February as compared to last year at -5.0, As this is an index, anything above 0 means that performance is ahead of the previous year and anything below 0 indicates that performance is below the previous year.

While visitation isn't growing much, the index decrease appears to be more of a function of reduced spending than less visitation. Visitors are spending less – either trading down on what they can or eliminating costs from their visits.

## 2025 YTD LODGING DATA (THROUGH SEPTEMBER)

Measurement	Commercial Lodging (STR)	Airbnb/HomeAway entire home rentals (AirDNA)	Vacation Rentals (KeyData)
Occupancy	Down 0.5%	Up 0.3%	Up 0.4%
Room Rates	Up 1.9%	Up 12.7%	Down 1.1%
RevPAR	Up 1.4%	Up 13.4%	Flat
Revenues	Up 2.5%	Up 14.2%	Down 1.7%
Demand	Up 0.7%	Up 0.5%	Down 1.3%
Supply	Up 1.1%	Up 0.5%	Up 0.1%

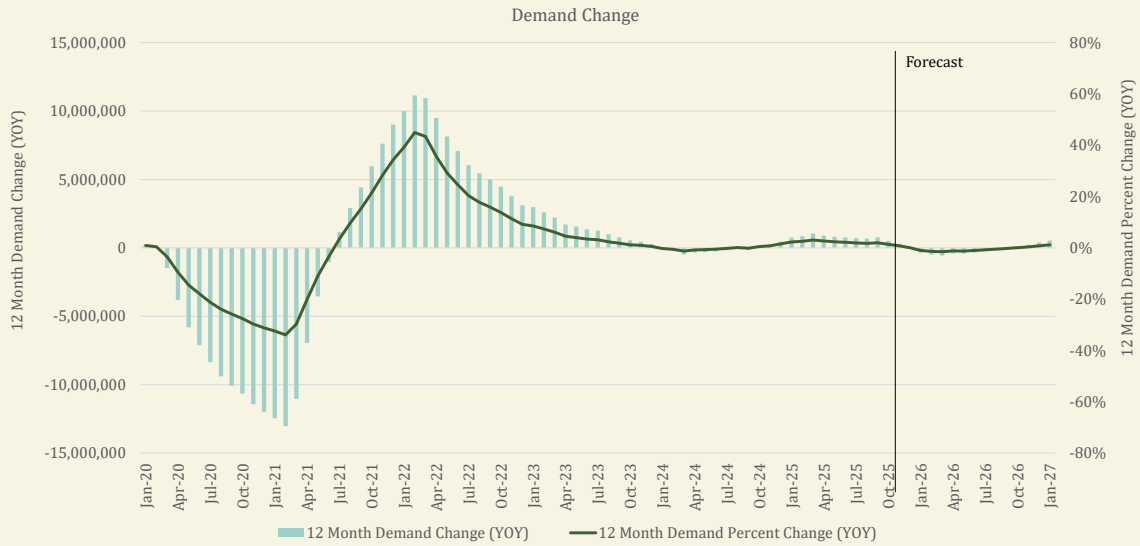
Source: STR, AirDNA, KeyData 2025



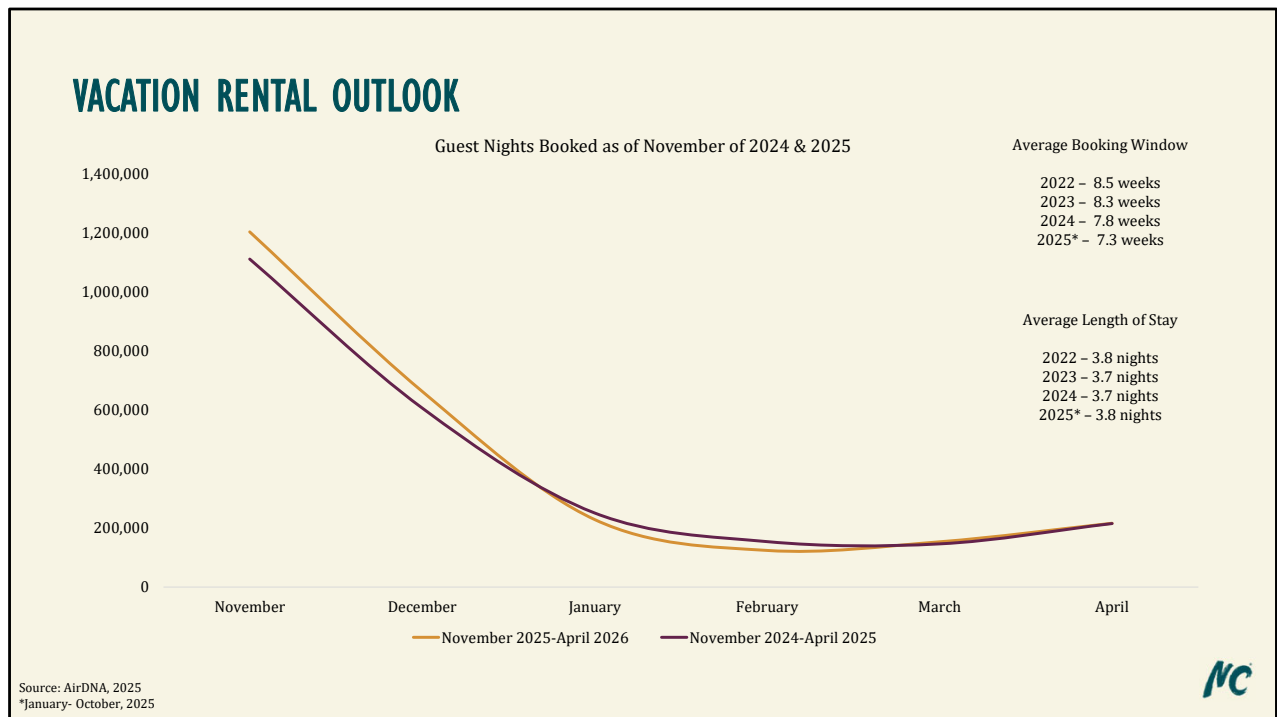
**Last Updated:** October 2025 (Monthly)

Lodging remains sluggish through the first half of the year. Even rentals, which have been strong the last several years, are relatively flat from last year. Rates remain strong though, which helps revenues stay out of the red for the year.

## COMMERCIAL LODGING FORECAST - DEMAND



As previously shown, statewide demand was up 1% in 2024. The current quarterly forecast, through 2026 shown here shows hotels/motels in NC having fairly flat demand through then end of the year and 2026 starting off slow, but also flat through the year.



**LAST UPDATED:** November 2025 (Monthly)

In a similar vain, we get six months of future booking data for shared economy rentals. Current pacing for November thru April demand is up about 4% from last year, particularly in November and December. This very likely correlates with the storm last year.

The booking window for these type of rentals is about a week shorter than three years ago. Based on this booking window, there is still time to book for winter and spring. Length of stay has remained fairly consistent.



The Traveler Sentiment Index (TSI) has decreased since the start of 2025.

The Traveler Sentiment Index™ (TSI) consists of six variables, including interest in travel, safety of travel, perceived affordability of travel, time available for travel, personal finances available for travel and quality of service. It provides a glimpse into how U.S. adults are feeling about travel this year compared to the same time a year ago.

Interest in travel down from 105 in Q3 2024 to 102 in Q3 2025.

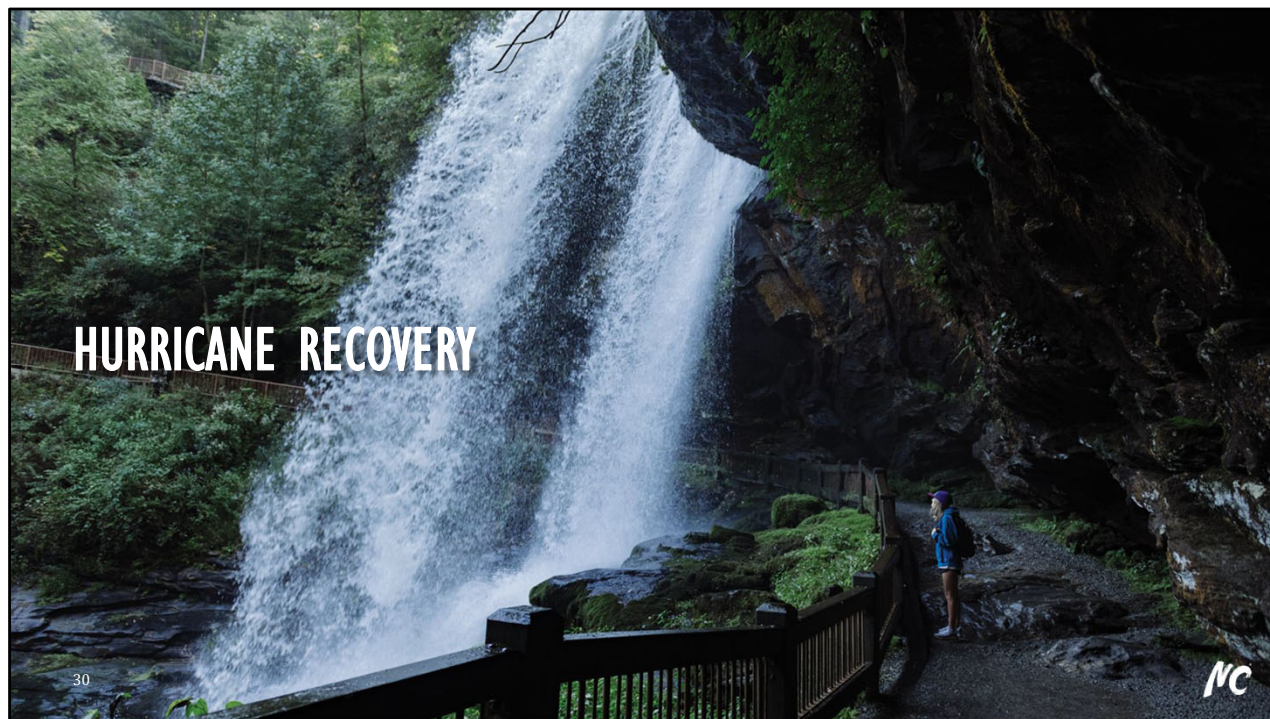
Safety of travel down from 98 in Q3 2024 to 93 in Q3 2025.

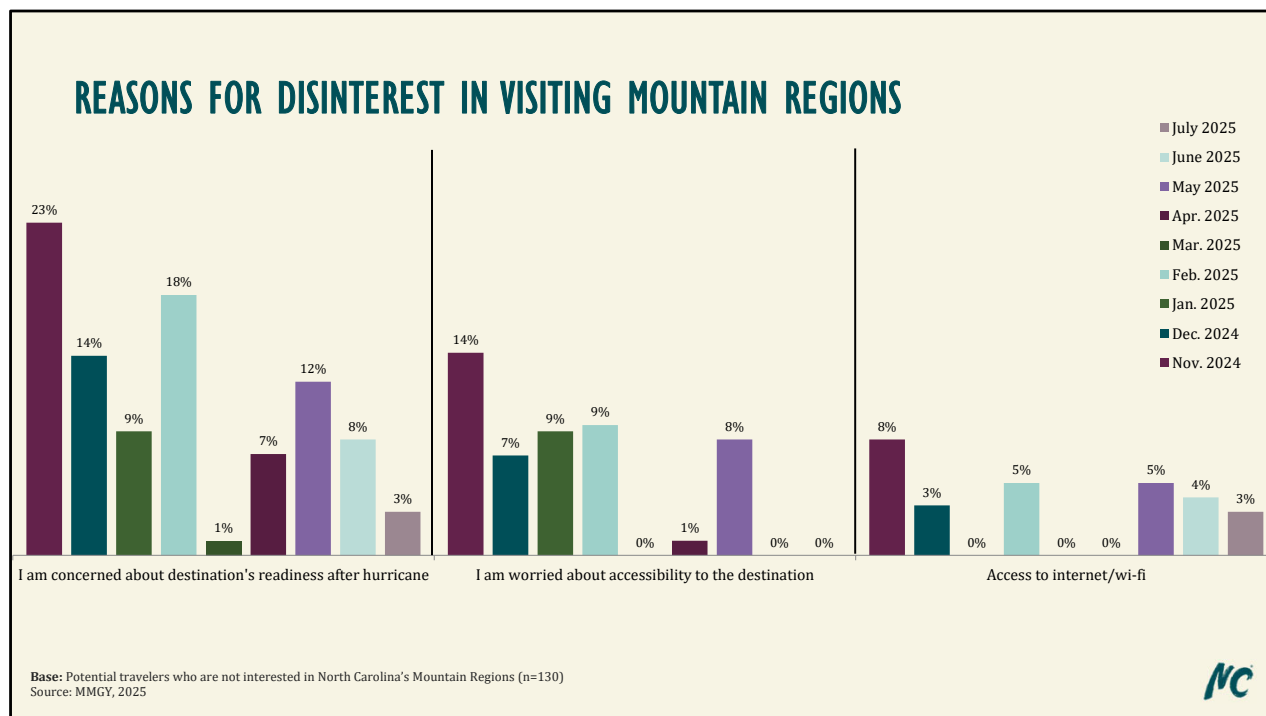
Perceived affordability of travel up from 116 in Q3 2024 to 123 in Q3 2025.

Time available for travel down from 111 in Q3 2024 to 109 in Q3 2025.

Personal finances available for travel down from 116 in Q3 2024 to 114 in Q3 2025.

Quality of service up from 108 in Q3 2024 to 111 in Q3 2025.





We have completed nine monthly tracking studies in our primary markets to understand travel intentions and perceptions of the state and mountain region. This graph represents data through July. We have decided to run three more monthly tracking studies with data on perceptions from October, November and December and will be providing that data to you as it is available.

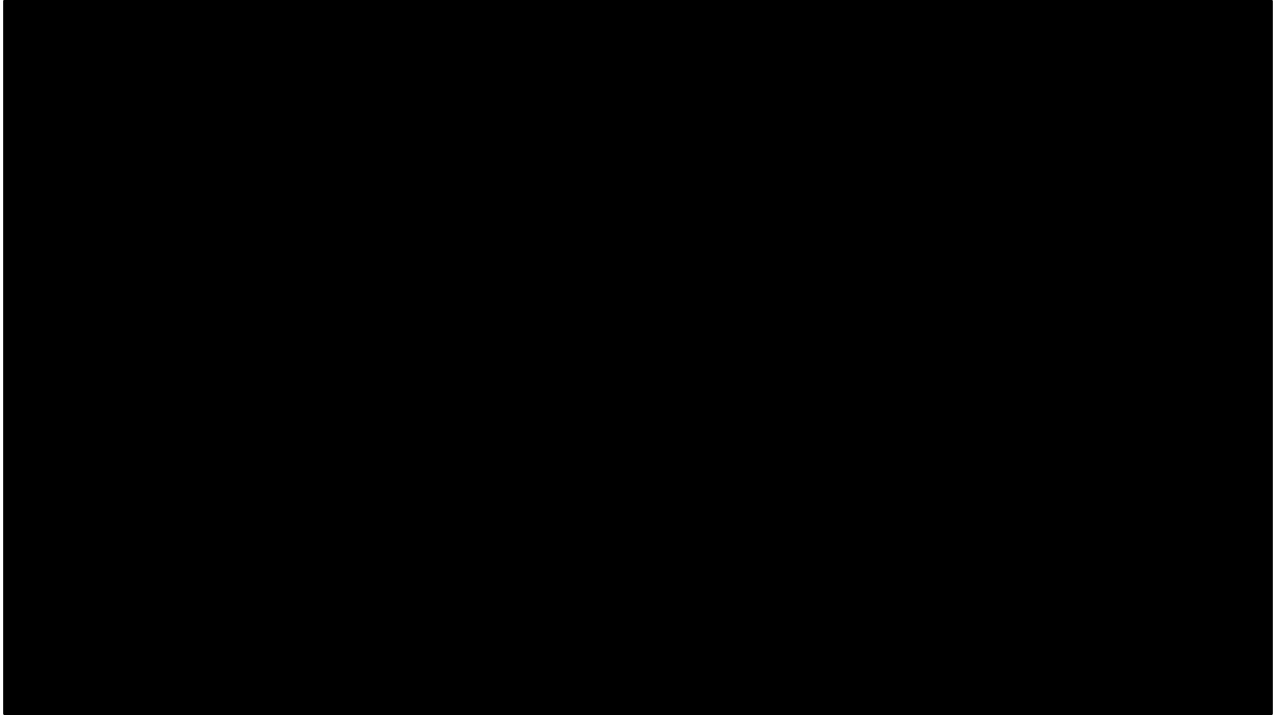
You can see here highlighted those hurricane-related reasons for not being interested in visiting the region in the next year. Concern about the region's readiness is greatly improved from November of last year but still indicates ongoing concern about destination readiness and internet.

As compared to the 3% for the Mountain region, 0% of visitors not interested in the Coastal Region say it's because of concern about readiness after the hurricane and 3% of visitors not interested in the Piedmont Region say it's because of concern about readiness after the hurricane. So perceptions regarding those two regions have greatly improved as well.



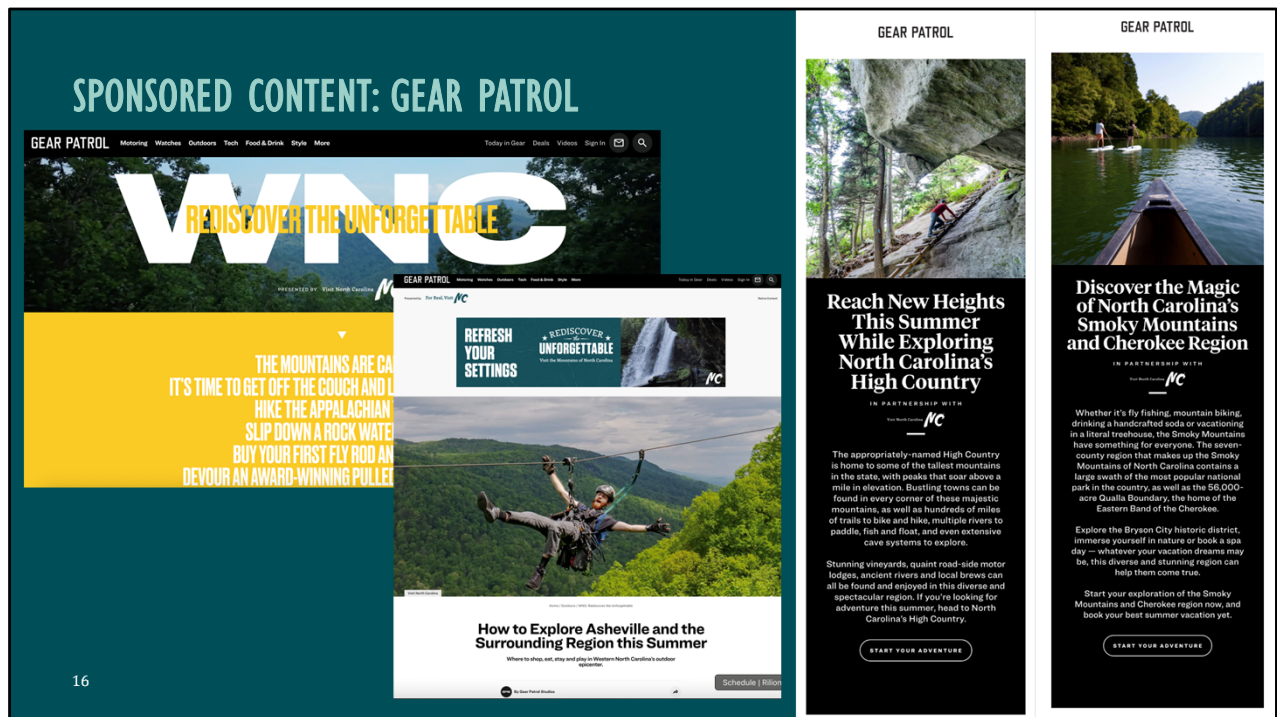
After looking at the vast improvement in visitor perceptions, we felt the time is right to change our campaign messaging from "our best way to get back is for you to comeback". It served us very well early in the recovery, but now we need something more inspiring vs heartfelt.

So, the creative team came up with "Rediscover the Unforgettable" and this is now the tagline and brand for the recovery campaign moving forward and it will not change again.



### **Mountain Recovery | Winter Flight**

Looking ahead to our Winter flight, which is live now, we approached it as we did the initial Rediscover spot showing a mixture of activities and locations, utilizing our footage along with footage provided from partners.



- This custom content buy we did with Gear Patrol went live in June and ran through October
- It includes:
  - Custom Content Series titled “WNC Rediscover the Unforgettable” including a custom microsite with interactive map, three native articles, three short form social videos, dedicated multi-platform promotion and high impact units
  - The content spreads the love across the mountains, highlighting the three subregions: High Country, Smoky Mountains & Cherokee, and Asheville & the Foothills
- So far it's already gotten nearly 4 million impressions.

## MOUNTAIN RECOVERY CAMPAIGN PERFORMANCE TOPLINE

**Total Paid impressions Nov '24 through 9/30/25:**

- 638,539,029

**Web:**

- Visits to Mountain Recovery Campaign Landing Page: 1,706,922

**Paid Social Engagements:**

- 5,953,465 engagements (likes, comments, shares, clicks on Facebook and Instagram)

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### Mountain Recovery Campaign | Performance Topline

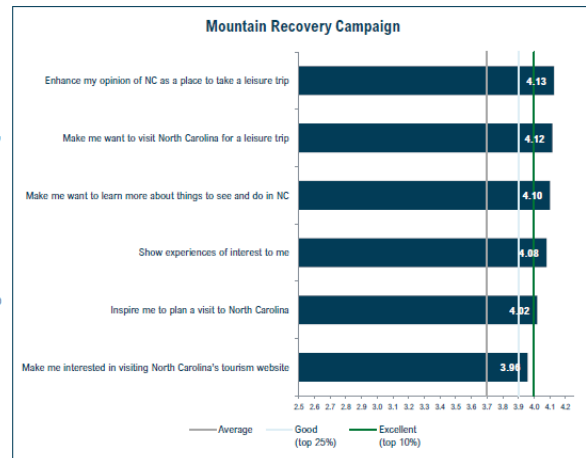
With the latest appropriation, we were able to do a few things.

- First, we extended our campaign end date through the current winter flight.
- We also added additional key target markets to plan in select, effect tactics like CTV.
- Creator support has been increased with a focus on each mountain sub-region
- And lastly, we have added additional sponsored content executions to be weaved into our plan in the winter months.

## Mountain Recovery Campaign Ratings

### Overall Impact

- The Mountain Recovery campaign creative received ratings above the top 10% benchmark for 5 of the 6 attributes.
- The most important metrics – *enhance my opinion of NC as a place to take a leisure trip*, *make me want to visit NC*, and *make me want to learn more about NC* – scored the highest of the six, which is extremely promising.
- All Mountain Recovery campaign impact metrics scored higher than their equivalent Brand campaign metric.
- *Makes me interested in visiting the official tourism website* was the lowest rated impact attribute for the Mountain Recovery campaign. However, this attribute still scored above the top 25% benchmark. As mentioned on the previous slide, we typically see campaigns that specifically highlight their website score higher on this metric. Despite not highlighting the website, this creative still performed very well on this metric.



## Return on Investment

- More distant markets also stay longer and spend more. Not only does the Brand Campaign generate more incremental trips, but the visitor spending per trip is significantly higher. Overall, Visit North Carolina's paid media investment has generated nearly \$500 million in influenced visitor spending since the beginning of 2025, for a return on investment of \$197.
- This influenced travel and return on investment accounts only for influenced travel for the first five months of the year, with the high seasons of summer and fall yet to be measured. While the return on investment is lower than the industry average for state DMOs of \$343, it is higher than Visit North Carolina's 2024 calendar year ROI of \$144.

	Influenced Trips	Aware Visitor Spending	Total Influenced Visitor Spending	Media Cost	Return on Investment
Mountain Recovery Markets	97,587	\$1,380	\$134,688,130	\$2,306,313	\$58
Overall	262,355	\$1,858	\$487,403,781	\$2,477,111	\$197

## SHUTDOWN RESPONSE

- Effective October 1
- Press release and VisitNC.com landing page
- Highlighting “if not that, try this” attractions and activities statewide including links to:
  - Local visitor bureaus
  - Iconic non-federal NC attractions
  - State Parks & Forests
  - State Historic Sites

### Across NC, find alternative travel options during shutdown

Staff report editor@averyjournal.com Oct 2, 2025 0



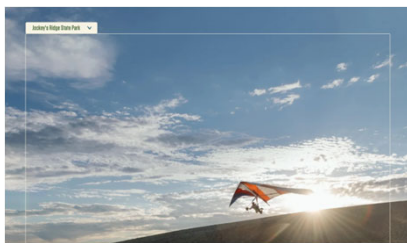
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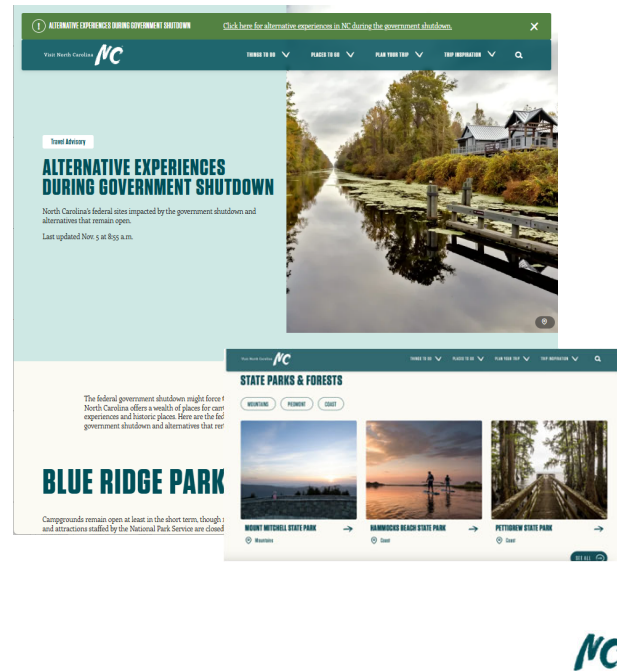
### Federal Shutdown Response

- Anticipating the October 1 shutdown, the Visit NC team crafted a press release providing information and links to numerous alternative experiences across the state for visitors and residents to enjoy.
  - <https://www.visitnc.com/media/news-release/nc-travelers-can-find-alternative-experiences-during-shutdown>
- Press release was repurposed as a landing page on VisitNC.com readily accessible statewide.
  - <https://www.visitnc.com/alternative-experiences-during-government-shutdown>
- Provides as much clarity as possible on federal attractions and amenities impacted and what remains open and accessible.
- Highlights the wealth and variety of other destinations, attractions and experiences still readily available with a “if not that, try this” approach to the content.

## SHUTDOWN RESPONSE



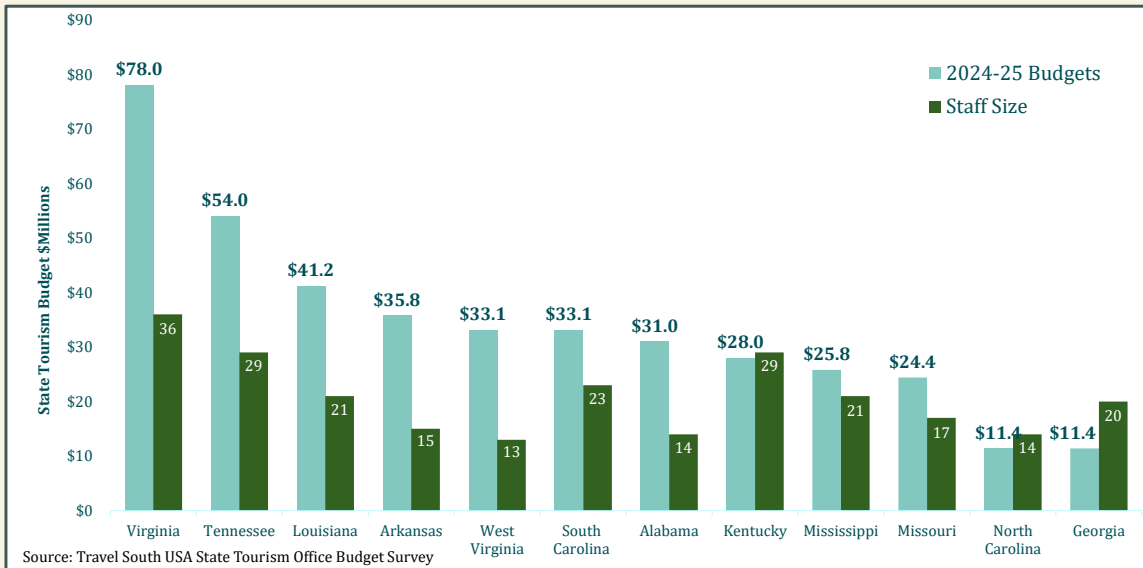
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## Federal Shutdown Response

Representative screenshots from the VisitNC.com “advisory” landing page.

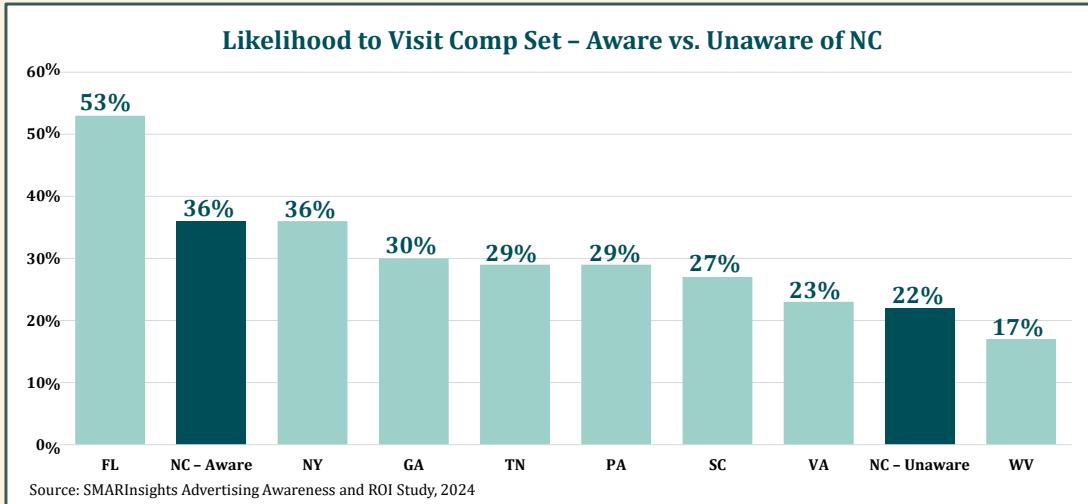
## SOUTHERN STATE TOURISM OFFICE BUDGETS & STAFF SIZE 2025



Nearly all of the states we are competing with for visitors have budgets and staffs that are twice our size.



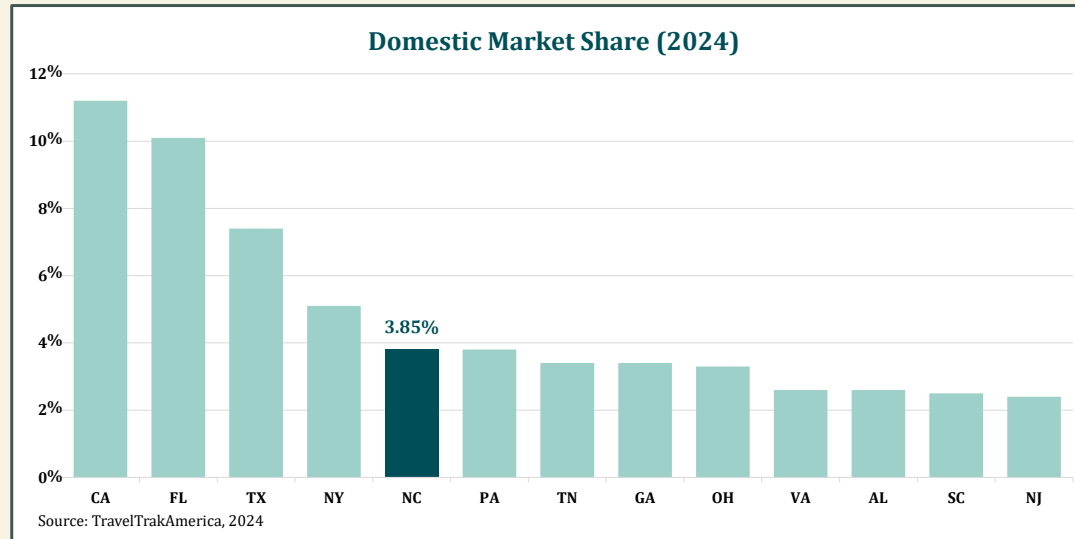
## ADVERTISING INVESTMENT LIFTS INTEREST AND VISITATION



If Visit NC can reach visitors with our messaging, we pass Virginia, South Carolina, Pennsylvania, Tennessee, Georgia and New York in likelihood to visit. Potential visitors aware of our marketing are 14 percent more likely to visit than those that have not seen our marketing efforts.



## MARKET SHARE 2024



North Carolina is the fifth most visited state in the nation, but we are only a half of a percent ahead in market share of Pennsylvania, Tennessee, Georgia and Ohio. Nearly all those competitors have budgets twice our size.



## TWO DECADES OF NORTH CAROLINA TOURISM BUDGETS

	2001-2002	2007-2008	2013-2014	2023-2024	2025-2026
	No website to budget	Includes Wine & Grape marketing of \$1.3 million	Final budget before move to the EDPNC		Current
	Total Budget \$9,700,000	Total Budget \$13,100,000	Total Budget \$10,138,000	Total Budget \$18,921,483	Total Budget \$11,421,483
Adjusted for 2025 inflation levels	<b>\$16,892,404</b>	<b>\$19,140,907</b>	<b>\$13,366,899</b>	<b>\$19,926,585</b>	<b>\$11,421,483</b>

**MARKETING**

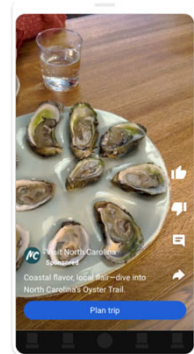
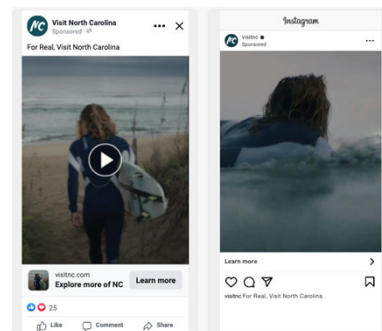
## FY25-26 BRAND CAMPAIGN OVERVIEW

- 62% reduction in our Core budget and supporting efforts as of July 1, 2025, as compared to the previous three fiscal years.
- **FY25-26 Core budget prioritizes:**
  - Partner Program support
  - Continued focus on Personalization efforts and technologies in Email and Web marketing efforts
  - Photo library refreshes (ensuring most up-to-date photo and video assets of destinations throughout the state for use on owned channels)
  - Strong presence on social channels with high reach
- **Areas most affected by FY25-26 Core budget reduction:**
  - Paid Media budget - impacting mass reach, frequency and target market footprint
  - Paid Media partnerships, such as Travel South domestic, NC Ski, NC Broadcasters Assoc, etc, and emerging media opportunities
  - Creative asset production, affecting campaign development for 'For Real,' 'First in Fright,' and a revival of 'Project 543' and emerging ideas
  - Volume of content produced internally and externally for Website, Email and Social channels

## FALL BRAND CAMPAIGN ADDED VALUE

The flight served **5.8M+ bonus impressions** above our contracted impressions for the fall flight.

Estimated Added Value: ~\$116,958.73

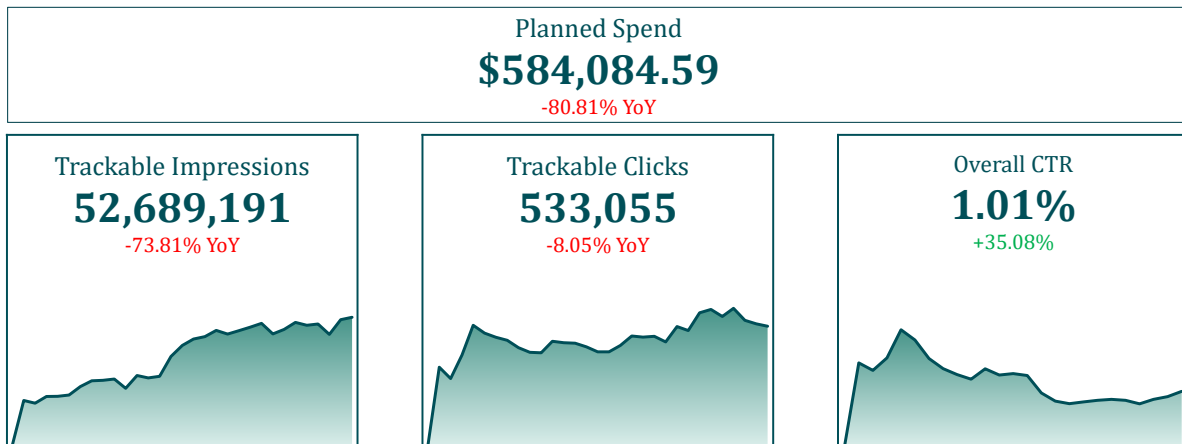


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### Fall Brand Campaign Added Value

And, in building strong relationships with our media vendors, we've been able to negotiate an additional 5.8 million impressions into our Fall flight, which equates to a savings of about \$117,000.

## BRAND MEDIA OVERVIEW | FALL FLIGHT



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### Brand Media Overview | Fall Flight

This fiscal year, our paid media budget is significantly less than the past three years. We saw spend for our Fall campaign down 80% compared to last year. So naturally, our reach and impression volume were much lower, which we fully expected given the reduced investment.

What's encouraging is how resilient our engagement remained despite that smaller spend. While impressions dropped roughly 74%, clicks only declined 8%. That means the audiences we did reach were highly intentional — they were interested and motivated to learn more.

We also saw our overall click-through rate climb more than 35%, landing just over 1%. So even though we were speaking to fewer people, the message and targeting resonated more strongly with the right ones.

Overall, these are strong signals that our media strategy is working efficiently despite its reduction.

## KEY CHANGES IN THE ORGANIC SOCIAL LANDSCAPE

1.

Instagram is changing its priorities to align with user preference.

2.

Meta channels are operating in an ecosystem vs. separate platforms.

3.

Platform shifts are due to changes in behavior, which will change how we evaluate performance.

Source(s): [Why is the Home Screen Defaulting to Reels](#) (AMA with Adam Mosseri, IG CEO), [Instagram Algorithm in 2025](#) (Hootsuite)

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### Key Changes In The Organic Social Landscape

We're seeing a major shift in how social platforms, especially Meta channels, are evolving — and these changes are directly tied to how users are engaging with content.

First, Instagram has shifted its priorities to reflect what users want most right now — short-form, entertaining, discovery-oriented content. That's why Reels and algorithmic recommendations now dominate the feed instead of just content from accounts you follow. It's less about maintaining a curated follower list and more about keeping people engaged through discovery.

Second, Meta is no longer treating Facebook and Instagram as distinct platforms. They're operating more like a connected ecosystem — where performance, reach, and audience behavior overlap. So, for example, an ad or a Reel can move fluidly between both channels, and the algorithm learns across them. That means we need to look at Meta holistically rather than channel by channel.

And finally, these shifts are really about changes in user behavior. People are consuming content differently — shorter attention spans, more video, and more passive discovery. As a result, the metrics we've traditionally used, like reach and follower growth, are becoming less meaningful. Going forward, we'll be focusing more on engagement quality, shares, and watch time as stronger indicators of success.

## OLD SALEM BAKERY :15



While we are focused on recovery for Western North Carolina, we continue to showcase the central and coastal parts of the state with our For Real, Visit NC core campaign.



### **First in Fright**

The *First in Fright* campaign continues to captivate audiences and grow its footprint year over year. With the addition of four new podcast episodes and expanded Haunted Trail points of interest, we've seen strong cross-channel engagement and deeper listener loyalty.

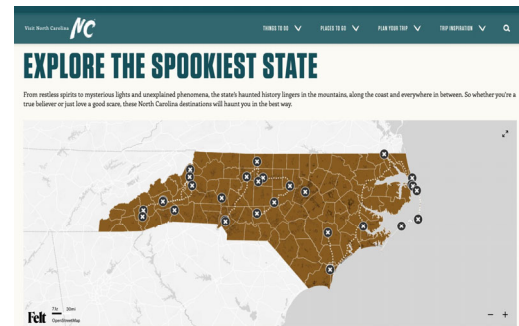
## FIRST IN FRIGHT

**Podcast listenership growth:** 43.5K total listens (+17K in last 90 days); 3.5K Spotify followers (+1K in last 90 days)

**Expanded ecosystem:** 4 new podcast episodes, additional Haunted Trail POIs and supporting content

**High audience engagement across channels:**

- **Spotify:** 2.3M impressions, 0.50% CTR (above 0.33% benchmark)
- **YouTube Shorts:** 2.7M impressions, 276K views, 10% view rate
- **Meta Lead Gen:** 452K impressions, 4.4K leads
- **Strong email growth:** 13.9K subscribers (+43% YoY), 7K unique opens (+35%)
- **Website interest sustained:** 109K content views, 78K total users



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### First in Fright

The *First in Fright* campaign podcast performance stands out as the centerpiece: over **43,000 listens to date**, with **40% of those in just the last 90 days**, showing clear momentum. Spotify followers have also risen by more than **1,000 in the same period**, signaling sustained interest and repeat engagement.

Paid support helped fuel this ecosystem: Spotify streaming and display ads outperformed benchmarks with a **0.50% CTR** versus a **0.33% average**, and YouTube Shorts delivered **276,000 views** and a **10% view rate** — exceptional performance for upper-funnel storytelling content.

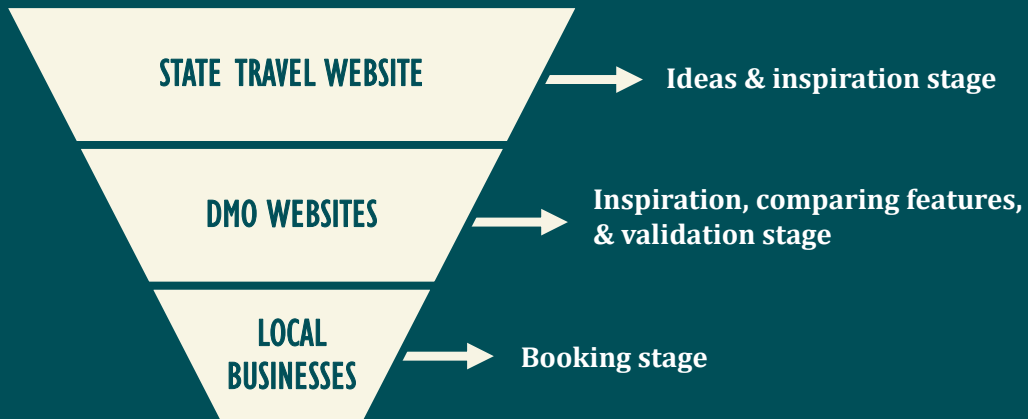
On social, Meta lead-gen efforts generated over **4,400 qualified leads**, while email subscribers surged **43% year over year**, strengthening our owned audience base for future spooky-season storytelling.

Finally, website interest remains healthy, with over **109,000 views** and **78,000 users** exploring First in Fright content — proof that the franchise continues to draw travelers seeking out North Carolina's haunted history.

Together, these results show how *First in Fright* has evolved beyond a single campaign into a durable, multi-channel storytelling platform that deepens affinity for North Carolina travel through intrigue, entertainment, and discovery.



# ROLE OF A STATE TRAVEL WEBSITE



To do these things, we had to establish the ideal model for trip planning and where a state travel website should live within the process.

1. Like our role in the marketing funnel, we live at the top. We're in the ideas and inspiration stage of travel planning.
2. Then comes you all, our DMO and CVB partners, in the inspiration, comparison and validation stage.
3. Local attractions and business' websites then help them actually book their trip and experiences.

# NEW VISITNC.COM

Built with a purpose

1

Convince  
travelers  
why to  
visit NC

2

Drive  
traffic  
to DMOs

3

Collect  
first-party  
data

4

Merge  
industry &  
media sites

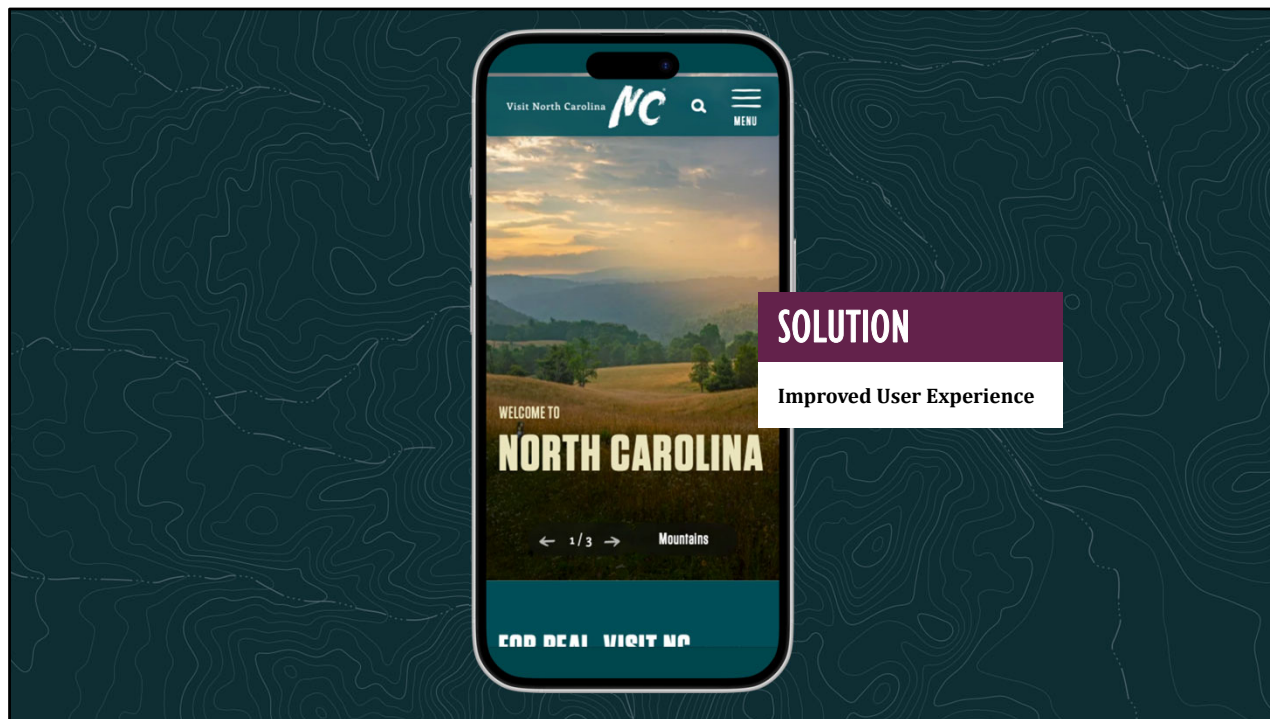
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Prioritize  
inspiration  
over  
booking

Our vision and understanding of our role shaped the goals of this new website:

Most of our competitor websites talk about the **what** and **how** of traveling before they've made a connection to the prospective traveler.

We needed our site to tell them **why** they should choose North Carolina.



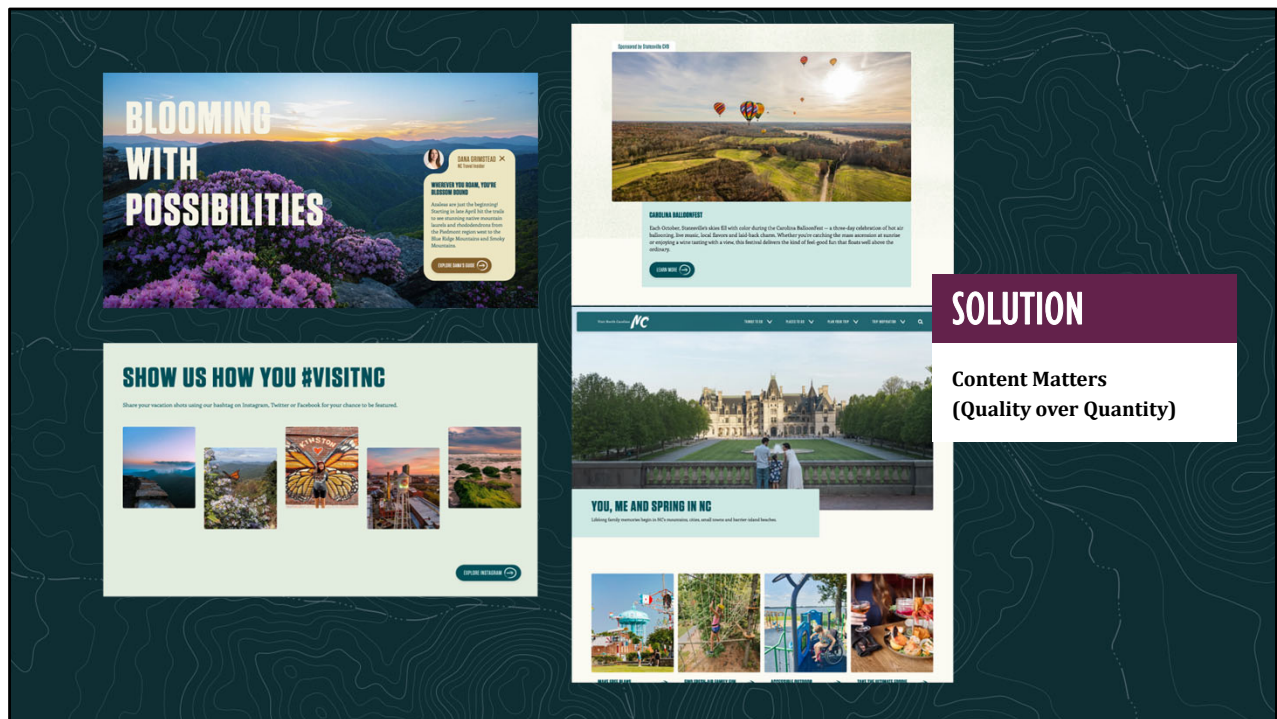
Here's what our new site looks like on mobile. Of the 5 million people who visit our website every year, 70% of them are accessing it from a mobile device.

So, designing mobile-first was critical for this project to ensure that every page worked just as seamlessly and presented the content just as beautifully as on a large desktop screen.



Here's the new site shown for desktop as a full page of Outdoor Explorer Psychographic page

With this shift, we're able to take our vast library of content and transform it into compelling stories, personalized itineraries and dynamic activity or location features. This page shows you just some of the new opportunities we can use to showcase all 100 counties, no matter the size or offering, in meaningful ways.



And here are other examples of "stunning" new content types that we will be using to inspire travel. Such as:

- Insider Authorship – a full-width image with a drop-down "locals tip"
- UGC
- Interest Overview Banner (Partner Program)
- Overview pages

With a focus on storytelling, itineraries, and psychographics, there's more room for smaller, lesser-known places to show up in meaningful ways.

Why it matters: It's not just the big cities on center stage—everyone gets a chance to shine, even if they don't have a massive budget or famous attraction.

# WHAT IT MEANS FOR PARTNERS

## A smarter handoff

1

Higher quality referrals  
(and no search cannibalization)

2

Partner content and communities are the stars

3

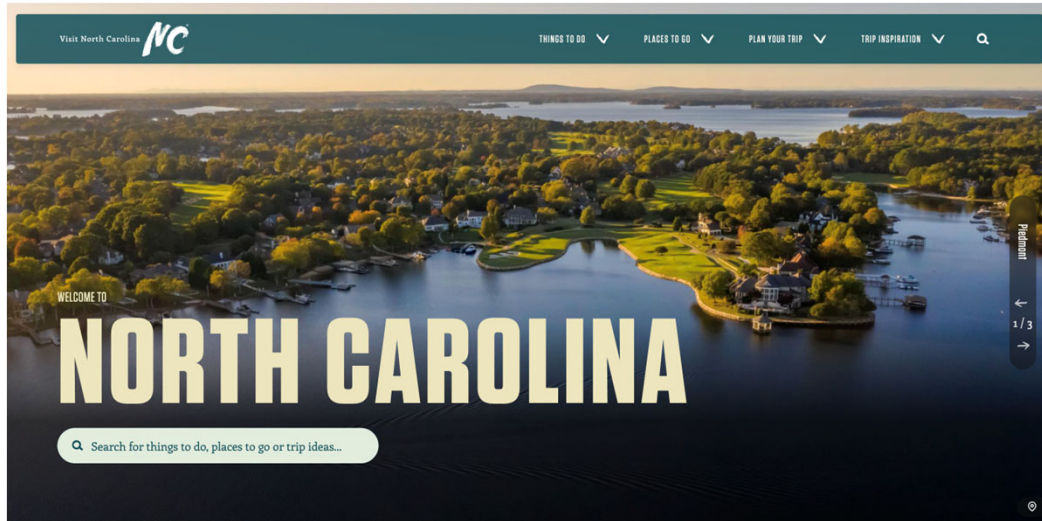
We drive the interest; partners close the deal

4

Website is more inspiring, intuitive and better supports partner goals

If you remember nothing else, this is our promise to you with the new website. So, feel free to take a photo of it and hold us to it.

## THE NEW VISITNC.COM



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### The New VisitNC.com

Our new VisitNC.com launched on Tuesday, September 23. Some key takeaways we're seeing in web performance with the launch of the new site, thus far:

1. Relaunch reignited interest — despite changing discovery habits
  - Website sessions rose 22% month-over-month in September following the Sept. 22 VisitNC.com relaunch, with a strong increase after the launch.
  - The surge shows strong re-engagement even as more travelers begin trip discovery via AI tools and conversational search.
  - The new site successfully re-establishes Visit NC as a credible, trusted destination hub in a shifting digital environment.
2. Organic search dip reflects both SEO reindexing & industry evolution
  - YoY organic traffic is down roughly 59% largely due to the broader migration away from traditional search as AI-driven discovery grows.
  - As search engines and AI platforms increasingly pull from authoritative sources, Visit NC's optimized site ensures it remains the origin of truth for North Carolina travel inspiration and planning.

### 3. LLM traffic emerging as a new channel — but not a replacement

- While AI platforms are reshaping discovery, they still depend on credible destination websites like VisitNC.com to fuel their responses.
- The website remains the cornerstone of Visit NC's digital ecosystem — powering both direct engagement, downstream referrals to our partners, and AI-assisted visibility.



Registration is now open.

# PUBLIC RELATIONS

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PC

## PUBLIC RELATIONS



- Attended the PRSA Travel & Tourism Conference
- Attended IPW media marketplace with 20+ international media
- German Mountain Rediscovery FAM highlighting mountain recovery in Mecklenburg, Watauga and Buncombe counties
- Attended ESTO to include co-facilitating the Public Relations and Communications States Roundtable session
- Western NC Mountain Rediscovery FAM highlighting mountain recovery in Buncombe, Avery, Yancey and Madison counties
- 2025 In-State Media Mission Symposium & In-State Media Mission
- Atlanta Media Mission with partners from Cabarrus, Cleveland, Guilford, Lee, Orange, Polk, Surry, Transylvania, Watauga, and Wilkes Counties in attendance

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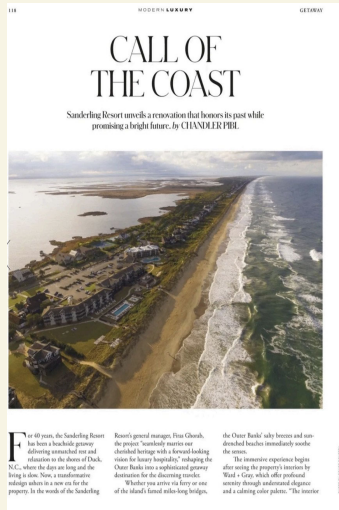
## WHAT WE'VE BEEN UP TO

- Attended the PRSA Travel & Tourism Conference (June 2-5) with partners from Asheville, Charlotte, Durham, Johnston County, Raleigh and Wilmington in attendance
- Attended IPW (June 14-16) that included an invite only media brunch and media marketplace with 20+ international media – also caught up with several international media we've worked with prior to discuss storylines and potential visits
- Lead the German Mountain Recovery FAM (July 16-20) to Mecklenburg, Watauga and Buncombe counties, with four German media - Carsten Schmidt, [Waves & Woods magazine](#) (print); Eva Orttenburger, freelance writer for [Verlag Nürnberger Presse](#) (print & online); Michael Krüger, Freelance travel writer for [Reise & Preise](#) (print); Bettina Bormann, Freelance travel writer for [Die Neue Reiselust](#) (print), [Globetrotter.ch](#) (online) and [Raushier](#) (online) - and one Lieb MMGY rep in attendance
- Attended ESTO (Aug 16-20) to including co-facilitating the Public Relations and Communications States Roundtable session with U.S. Travel's Maggie Soto
- Lead the Western NC Mountain Rediscovery FAM (Sept 15-19) to Buncombe, Avery, Yancey and Madison Counties with Gabriela Arevalo (Parade), Douglas Paton (Men's Journal, The Globe and Mail), Hayley-Rose Schultz (VUE Atlanta) in attendance
- Organized & executed the 2025 In-State Media Mission Symposium featuring Visit NC's PR and Marketing staff, plus J/PR and Luquire reps, covering 2026 trends and hot topics, influencer and creative partnerships, itineraries, FAMs and media outreach, plus AI in PR

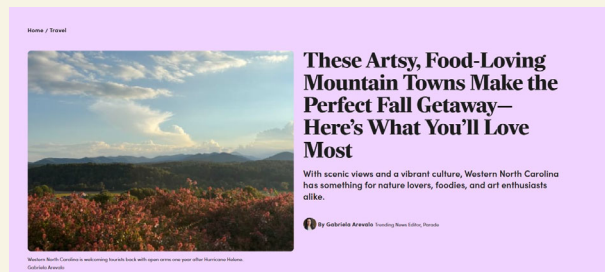
(Oct 7)

- In-State Media Mission with 42 partners and 42 media confirmed in a new progressive format taking place at Natural Science Bar and Mala Pata (Oct 7)
- Atlanta Media Mission (Oct 27-29) with partners from Cabarrus, Cleveland, Guilford, Lee, Orange, Polk, Surry, Transylvania, Watauga, and Wilkes Counties in attendance meeting with 14 media

## PUBLIC RELATIONS



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## RECENT PRESS

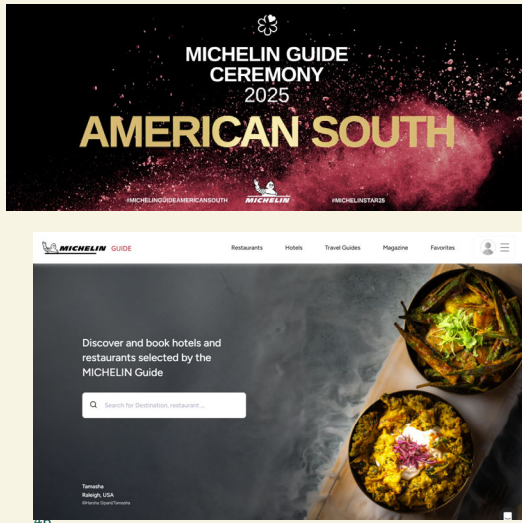
Call of the Coast: Post Coastal Contrasts FAM coverage in Modern Luxury

Beneath Blue Velvet: Post Travel South USA FAM coverage in UK Publication

“Almost Heaven”: Post German Mountain Rediscovery FAM coverage in German Publication NN.de

These Artsy, Food Loving Mountain Towns Make the Perfect Fall Getaway: Post Mountain Rediscovery FAM coverage in Parade

## 47 NC RESTAURANTS FEATURED IN MICHELIN GUIDE



- Inaugural Michelin Guide to the South
- Charlotte's Counter- gets one star rating
- Colleen Hughes of Charlotte's Supperland received a Michelin Exceptional Cocktails Award,
- Counter- and Asheville's Luminosa earned Green Stars for their inspiring visions.
- Thirty-nine restaurants were designated as recommended
- Seven restaurants were designated as Bib Gourmands for good food and good value



### LOOKING FORWARD

- Attending the inaugural MICHELIN Guide American South Ceremony at Peace Concert Hall in Greenville, SC with selected chefs and restaurateurs from around the state (Nov 3)
- Co-host of the MICHELIN Guide American South Ceremony after party with Tennessee and Atlanta, toasting the chefs, culture and creativity that defines Southern hospitality (Nov 3)
- NYC Media Mission (Nov 3-5) with partners from Carteret, Craven, Haywood, Jackson, and New Hanover Counties in attendance, meeting with 25 media
- Michelin Masterclass FAM (Nov 5-9) highlighting Mecklenburg, Buncombe, Wake and Durham counties, with Jason Jones (EATER Carolinas), Noah Kaufman (Bon Appetit and Epicurious), Kayleigh Ruller (Food & Wine, SouthPark Magazine, regional Charlotte pubs) & Hunter Lu (Chowhound, The Manual, TastingTable) in attendance

## REGIONAL MEDIA MISSION SCHEDULE 2025

 <b>Fort Worth/Dallas/ Austin</b> April 14-16	 <b>Chicago</b> June 3-4	 <b>Nashville</b> September 28-30	 <b>Charleston</b> October 13-15
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- Fort Worth/Dallas/Austin (April 14-16)
- Chicago (June 3-4)
- Nashville (September 28-30)
- Charleston (October 13-15)



## LESHAUN COOK JOINS AS FILM SERVICES MANAGER

- Key focus areas:
  - Permit Assistance
  - Locations Library
  - Crew Directory
- Hometown is Raleigh
- Previously at City of Atlanta's Film & Entertainment Office
- Email: [leshaun@filmnc.com](mailto:leshaun@filmnc.com)

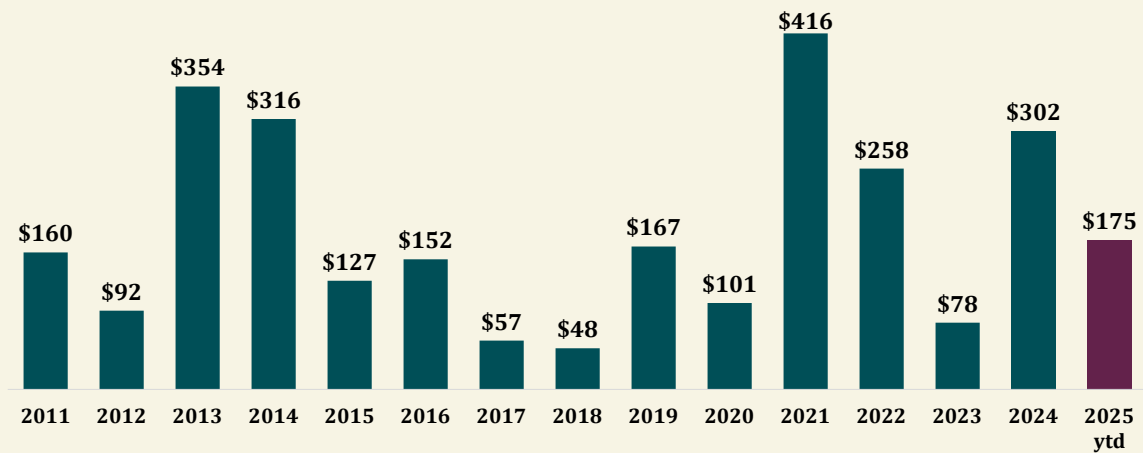


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**Welcome addition to the Film Team**

## DIRECT IN-STATE SPEND BY PRODUCTION (IN MILLIONS)



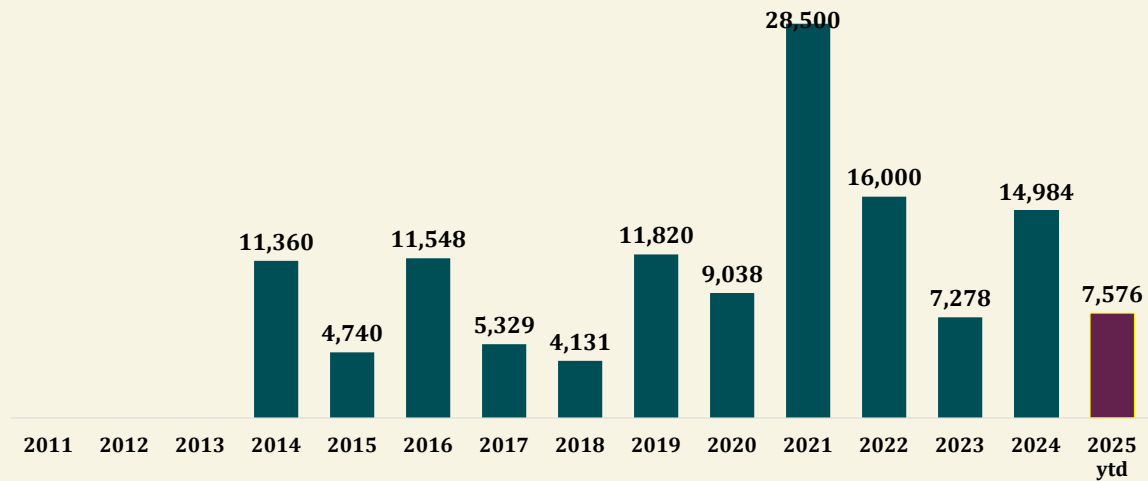
*\*As of 30 October 2025*



While 2025 spending figures have risen to respectable levels, production overall remains slow in North Carolina as well as across the U.S. Higher production costs within the States related to shooting in foreign countries remains a challenge.

Overall, North Carolina is definitely punching above our weight, but the 2025 figure YTD is greatly helped by one large production.

## JOB OPPORTUNITIES



*\*As of 30 October 2025*



Employment figures typically fall in line with annual spending numbers. However, this figure can be impacted by productions that have larger numbers of background talent.

To that end, the 2025 employment figures are more in line with years that have had lower spending totals---this is mostly a result of the previously mentioned one large project that was lifting our in-state spend figure (and that project hired a “typical” number of individuals despite its bigger spending figure).

## PROJECTS CURRENTLY IN PRODUCTION & NEW AWARD ANNOUNCEMENTS

RJ Decker  
Season 1 \*

The Hunting Wives  
Season 2 \*

Widow \*

Syndicate \*

Projects currently in production in WHITE \* denotes Film Grant awardee



### Details on current and recently wrapped productions and new awardees

#### RJ Decker – Season 1

- TV/Streaming Series (for ABC)
- Filming in Wilmington area and expected to have a direct in-state spend of \$42M
- Also shot its pilot in the state earlier in the year
- Filming to run from mid-November to April '25

#### The Hunting Wives – Season 2

- TV/Streaming Series (for Netflix)
- Filming in Mecklenburg and Iredell counties (among others) and expected to have a direct in-state spend in excess of \$50M
- Filming to run from mid-November to April '25

#### Widow

- Independent feature-length film (ties to UNC School of the Arts)
- Filming in Davidson, Forsyth, and Surry counties and expected to have direct in-state spend in excess of \$7.3M
- Filming to conclude in November

#### Syndicate

- Independent feature-length film
- Filming to take place in greater Charlotte area (exact locations still being finalized) and expected to have a direct in-state spend in excess of \$16M
- Filming taking place in the first quarter of 2026

## ADDITIONAL NOTES ON FILM

- Two (2) monthly outreaches now taking place to out-of-state producers and industry executives
- 3 productions, with a strong 4<sup>th</sup> likely, already **committed to NC** for first half of 2026
- “Christy” in theaters starting **November 7**
- New efforts underway to **update key marketing tools**
  - Focus on **locations** library entries for **Western NC**
  - New procedure to **update crew listings** for our in-state film professionals (for work done on projects approved for the grant)



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Outreaches include our monthly doughnut deliveries and an introductory (or re-intro) letter and industry brochure to production companies with new projects in development.

3 productions for 2026 include Season 1 of “RJ Decker”, Season 2 of “The Hunting Wives”, and “Syndicate”

“Christy” filmed in the greater Charlotte area, was approved for the state’s film grant program, and was expected to have a direct in-state spend in excess of \$15M. See a trailer and learn more on the feature here:

[https://www.imdb.com/title/tt32323252/?ref=nm\\_sr\\_srgs\\_1\\_tt\\_3\\_nm\\_4\\_in\\_0\\_q\\_christy](https://www.imdb.com/title/tt32323252/?ref=nm_sr_srgs_1_tt_3_nm_4_in_0_q_christy)

## PARTNER AND INDUSTRY RELATIONS

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NC

## AMANDA BAKER

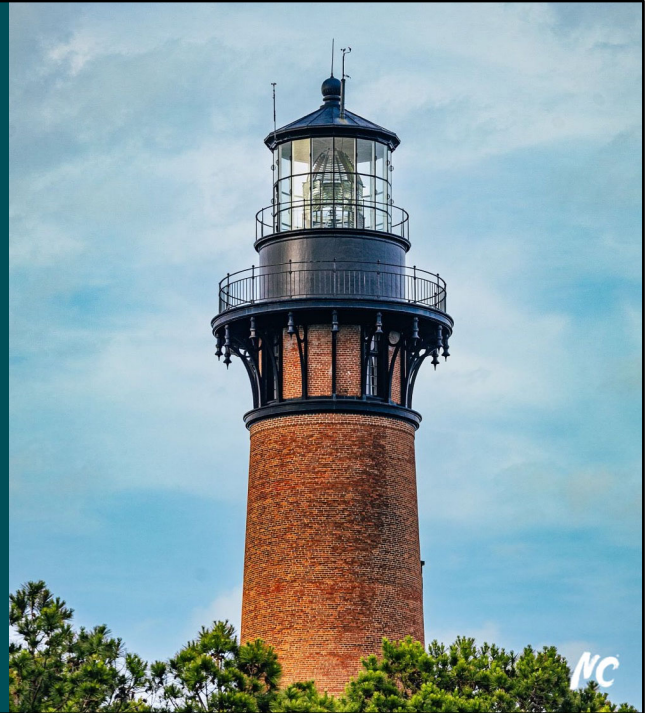
*Director of Partner and  
Industry Relations  
Visit NC*



## OUTDOOR NC

- Onboarding Partners
  - 8 Guardian Partners
  - 33 Champion Partners
  - 8 Pioneer Partners
  - 2 Statewide Partners
- Launched the 2025 version of the Official North Carolina Trail Town Guide

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- \*New\* onboarding meetings per tier level
- \*New\* sublicensing agreements

## OUTDOOR NC PARTNERS 2025-2026

Guardian	Champion		Pioneer	Statewide
<ul style="list-style-type: none"> <li>Outer Banks VB</li> <li>Transylvania County TDA</li> <li>Blowing Rock TDA</li> <li>Greensboro Area CVB</li> <li>Sugar Mountain TDA</li> <li>Explore Asheville</li> <li>Beech Mountain</li> <li>Statesville CVB</li> </ul>	<ul style="list-style-type: none"> <li>Cherokee County TDA</li> <li>Duplin County</li> <li>Elkin TDA</li> <li>Gaston County Parks, Recreation and Tourism</li> <li>Martin County TDA</li> <li>Henderson County TDA</li> <li>Franklin TDC</li> <li>Northern Outer Banks</li> <li>Graham County Travel and Tourism Authority</li> <li>Greenville- Pitt County CVB</li> <li>Johnston County CVB</li> <li>Hickory Metro CVB</li> <li>Alamance County VB</li> <li>Person Count TDA</li> <li>Nash County Travel and Tourism</li> <li>Swain County TDA</li> </ul>	<ul style="list-style-type: none"> <li>Burke County TDA</li> <li>Haywood County TDA</li> <li>Halifax CVB</li> <li>Onslow County Tourism</li> <li>Rutherford County</li> <li>Randolph County</li> <li>Wilkes County TDA</li> <li>Rockingham county</li> <li>Pinehurst- Southern Pines-Aberdeen CVB</li> <li>Mitchell County</li> <li>Destination McDowell TDA</li> <li>NC Oyster Trail</li> <li>Pasquotank County TDA</li> <li>Wilmington and Beaches</li> <li>Watauga TDA</li> <li>Lake Norman CVB</li> <li>Highlands Chamber of Commerce</li> </ul>	<ul style="list-style-type: none"> <li>Brunswick County TDA</li> <li>Greater Raleigh CVB</li> <li>Alleghany County Chamber of Commerce</li> <li>Nantahala Outdoor Center</li> <li>Pender County TDA*</li> <li>Camden County TDA</li> <li>Elizabethtown-White Lake Chamber of Commerce</li> <li>Lumberton VB</li> </ul>	<ul style="list-style-type: none"> <li>NC Department of Commerce</li> <li>Great Trails State Coalition*</li> </ul>

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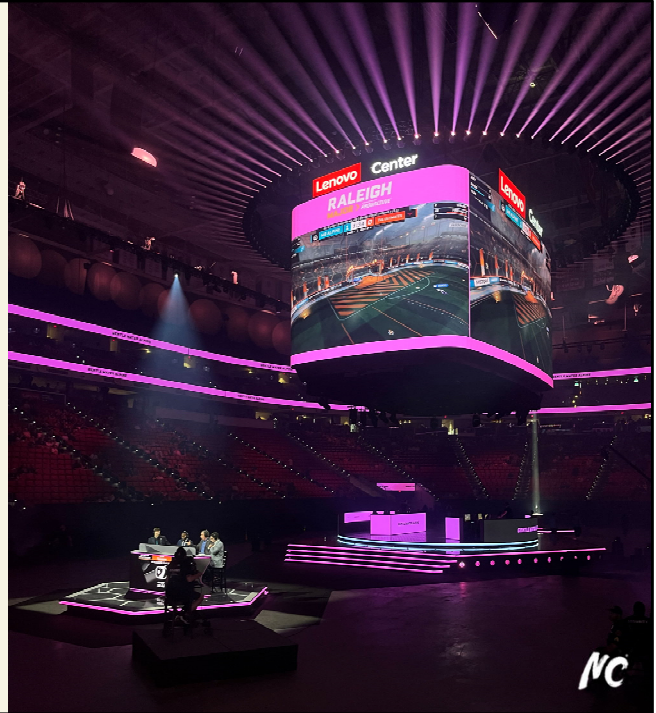
\*finalizing details

## SPORTSNC

The Raleigh Major took place at the Lenovo Center. North Carolina's home for professional ice hockey played host to 16 of Rocket League's best teams competing for their share of the \$351,000 prize pool and vital RLCS points to qualify for the Rocket League World Championship.

The Raleigh Major broadcast June 26-29. On June 28-29, the Lenovo Center opened its doors to the fans, to watch players in the game face off to be crowned Raleigh Major champions.

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The RLCS returned to North America last June for the second RLCS Major of the year.

The Raleigh Major took place at the Lenovo Center. North Carolina's home for professional ice hockey played host to 16 of Rocket League's best teams competing for their share of the \$351,000 prize pool and vital RLCS points to qualify for the Rocket League World Championship.

The Raleigh Major broadcast ran from June 26-29. On June 28-29, the Lenovo Center opened its doors to the fans, to watch players in the game face off to be crowned Raleigh Major champions.



# Cycle North Carolina

## COMMUNITY PARTNERS & VISITOR ATTRACTIONS

### Host Town Community Partners

- Town of Oriental
- Rutherford County TDA
- Town of Lake Lure
- Town of Banner Elk
- Wilkesboro TDA
- Visit Winston-Salem
- City of Winston-Salem
- Town of Mebane
- Alamance County Visitors Bureau
- Vance County Tourism
- Tarboro Edgecombe Chamber
- Visit Kinston
- Town of Emerald Isle
- Crystal Coast TDA



### Pass Through Town Community Partners

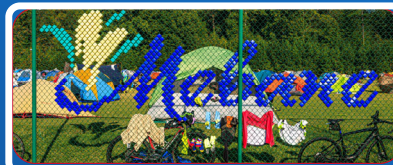
- Arapahoe
- Minnesott Beach
- Hobucken
- Lowland
- Vandemere
- Bayboro
- Aurora
- Chimney Rock
- Spindale
- Blowing Rock
- Happy Valley
- East Bend
- Pfafftown
- Bethania
- Rural Hall
- Belews Creek
- Stokesdale
- Summerfield
- Castalia
- Red Oak
- Fountain
- Farmville
- Trenton
- Swansboro

### Visitor Attractions - Along the Route

- Camp Seafarer
- Joe Himbry Waterfront Park
- The Aurora Fossil Museum
- R.E. Mayo Seafood
- J&M Oyster Company
- Squidders Store
- River Dunes
- Arlington Place
- Kennel's Beach
- Minnesott Beach-Cherry Point Ferry
- Rumbling Bald Resort
- Parker-Binns Vineyard
- Spindale House
- Downtown Blowing Rock
- Whippoorwill Academy and Village
- Sanders Ridge Vineyard
- Greensboro Permoring Arts
- Textile Heritage Museum
- Eno River Farms
- Stagville
- Lake Devin
- Laurel Grist Mill
- Fountain General Store
- Simply Natural Creamery
- Brock Mill Pond

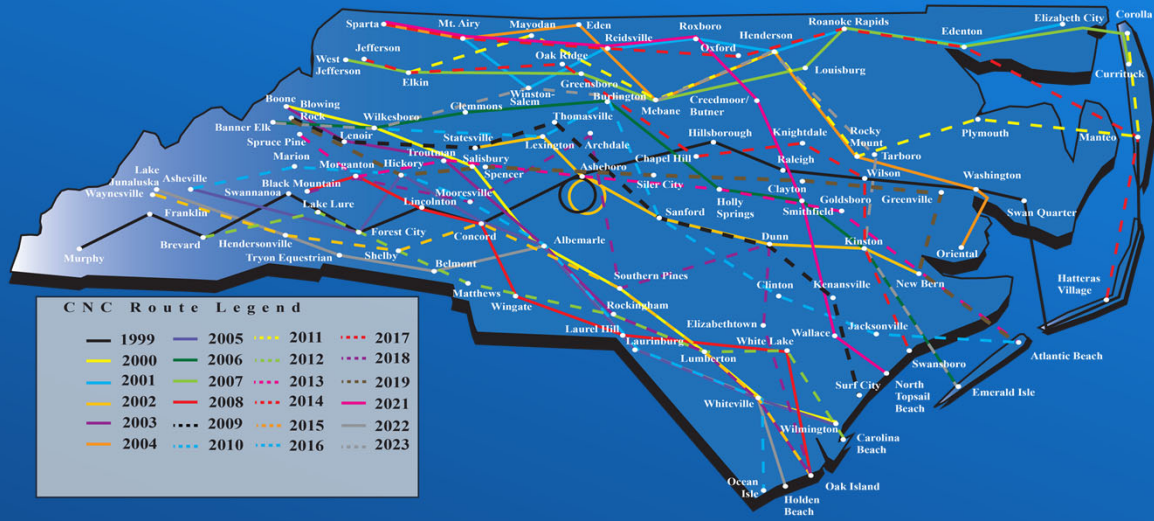
### Visitor Attractions - Excursions

- The Blowing Rock
- Mystery Hill
- Rescue Ranch
- Statesville Historic District
- historic Korner's Folly House Museum
- Downtown Kernersville
- Charlotte Hawkins Brown Museum
- Carolina Basketball Museum
- Ackland Art Museum
- Franklin Street
- Duke Chapel
- Halifax State Historic Site
- Sylvan Heights Bird Park
- May Museum
- Downtown Greenville
- Harmony Hall
- Downtown New Bern





# Mountains to Coast Route History 1999-2023



## INTERNATIONAL - BRAND USA TRAVEL WEEK



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### **Brand USA Travel Week UK & Europe**

Wit Tuttell, Scott Peacock and Amanda Baker, along with Visit Raleigh's Jessica Holt, participated in the Brand USA Travel week in London this week. The event brings together key players in the U.S., U.K. and European travel industry to discuss trends, challenges, innovations, and the opportunity to drive future visitation to the United States. The team has meetings with hand-picked travel buyers (tour operators) from across the U.K. & European markets as well as media appointments with top trade and consumer journalists from across Europe. We also had meetings with international representation offices from the UK and Germany to discuss potential future promotions such as the new Air Lingus flight to RDU.

## INTERNATIONAL — BRAND USA & TRAVEL SOUTH

The Brand USA Integrated Marketing Campaign with Travel South USA (NC campaign) delivered:

- 12,418,780 total impressions
- 20,686 total clicks
- \$150,291 total air & hotel bookings
- 519 total room nights



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### Integrated Marketing Campaign

Brand USA Integrated Marketing Campaign with Travel South USA to engage the UK audience through different channels, targeting customers with unified objectives and messaging. Thematic messaging supports the south's three key pillars: road trips, music, and food and drink.

5,714,00 co-branded programmatic native ad impressions linking directly to destination's content on [travelsouth.visittheusa.com](https://travelsouth.visittheusa.com)

3,335,000 co-branded carousel ad unit programmatic impressions, linking directly to North Carolina content on [travelsouth.visittheusa.com](https://travelsouth.visittheusa.com)

2,000,000 co-branded Sojern display ad impressions linking directly to NC content on [travelsouth.visittheusa.com](https://travelsouth.visittheusa.com)

Inclusion on "Travel South" Expedia landing page linking to NC custom landing page

Leading to impressions, clicks and bookings of room nights

North Carolina specific campaign:

Native Programmatic results performed 12% above estimated impressions.  
May 12- June 10, 2025

Carousel Programmatic results performed 20% above estimated impressions.  
May 6-June 30, 2025

Sojern Native Media results performed 1% above estimated impressions  
April 28-June 27, 2025

Expedia Activity  
April 28-July 20, 2025  
Lookback window: July 20-August 20

### **Brand USA and Travel South FDM Travel Influencers**

Amanda Baker finalized a Western NC itinerary for a group of social media influencers this week. But they aren't your typical influencers. These influencers work for FDM Travel. FDM is a market-leading Danish travel agency specializing in self-drive vacations and individualized travel for customers of the Federation of Danish Motorists (FDM). The company arranges trips worldwide, particularly emphasizing self-drive holidays in destinations like the USA, Canada, Australia, and Europe, offering packages that include flights, car rentals, and accommodations. To help their travel agent sales staff showcase their North Carolina packages and increase sales, we worked with them to send two social media influencers to Hendersonville, Asheville, Boone, Blowing Rock, and Charlotte. This was done as part of our partnership with Travel South USA.

## PARTNER RELATIONS

In May, Visit NC's Andre Nabors spoke on a panel during the NC Revolutionary Road Trips screen event in Raleigh. The screening was in reference to the PBS series "Travels with Darley." The Revolutionary Road Trips episode featured 6 NC counties - Guilford, Alamance, Orange, Durham, Johnston and Halifax.

- The full North Carolina Revolutionary Road Trip episode is now on YouTube at <https://www.youtube.com/watch?v=NIUtSjGFF24&t=3s>

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<https://www.youtube.com/watch?v=NIUtSjGFF24&t=3s>

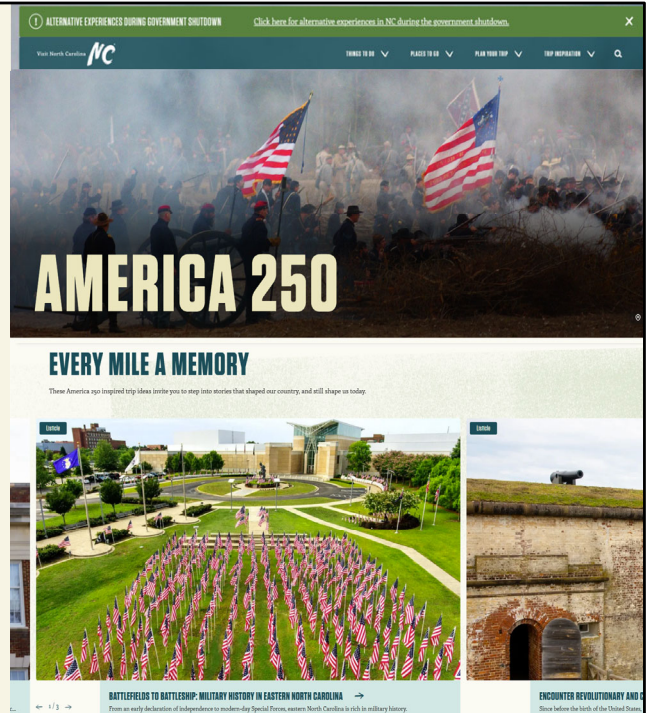


<https://www.youtube.com/watch?v=NIUtSjGFF24&t=3s>

## AMERICA 250 CELEBRATION

We will showcase North Carolina's role in the birth of our nation through several activations.

- Featured space about our Revolutionary history in the 2026 Travel Guide.
- Highlights in the Guide about North Carolina being First in Freedom.
- VisitNC.com overview page showcases relevant sites throughout the state
- Social media and email content to encourage travelling for the anniversary.
- Ability for partners to use their partner program buy-ins to focus on their part of the America 250 story





# 2026 VISIT NC TOURISM CONFERENCE

**Monday, March 16 – Wednesday, March 18**  
**The Omni Grove Park Inn & Spa**

[Register Now](#)