



VISIT NC UPDATE

December 7, 2021

Visit North Carolina Program Goals

The mission of
Visit 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.*



Visit North Carolina Programs

Visit NC

- Advertising
- Public Relations
- Group Travel
- Sports Event Marketing
- Industry Leadership
- International Marketing
- VisitNC.com
- Tourism Development
- Retire NC Program
- Research
- Community Outreach
- Social Media Outreach
- Film
- Publications

Commerce Visitor Services

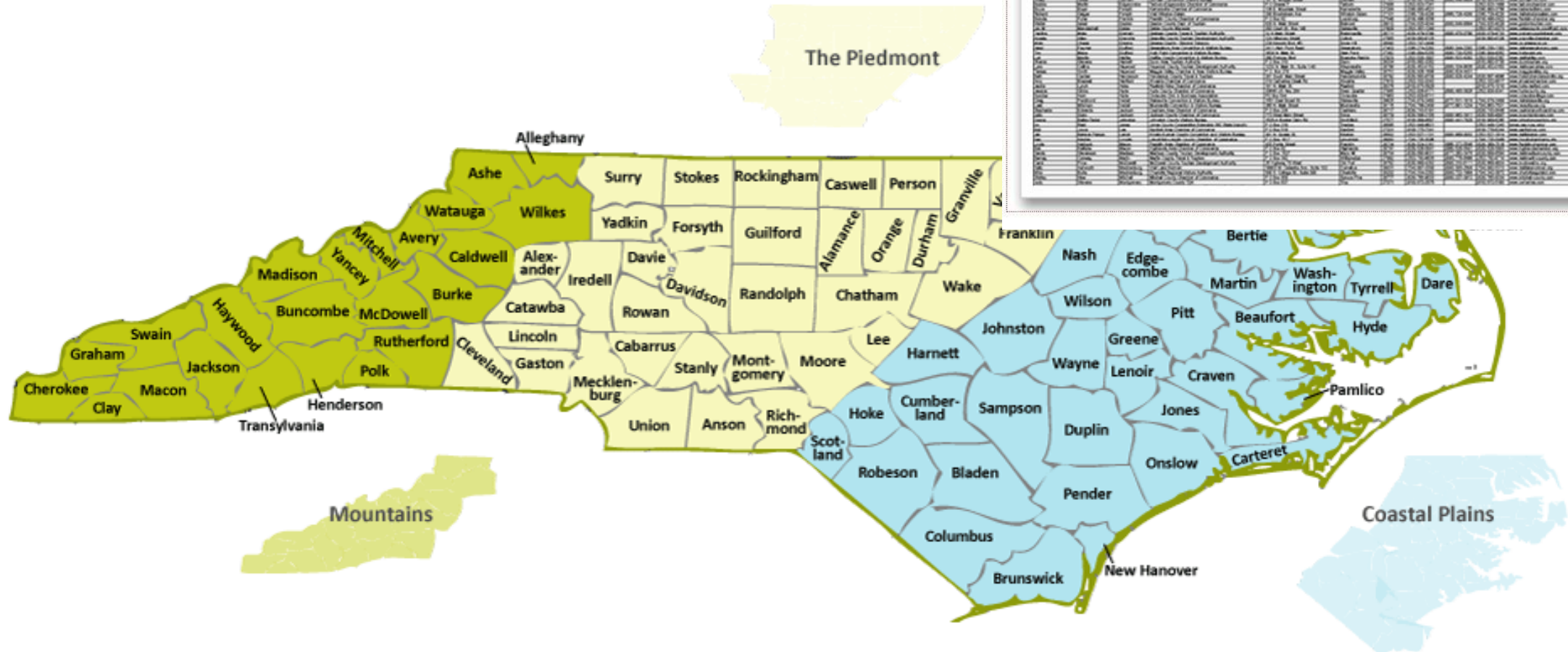
- Welcome Centers
- Fulfillment
- Call Center
- Warehouse



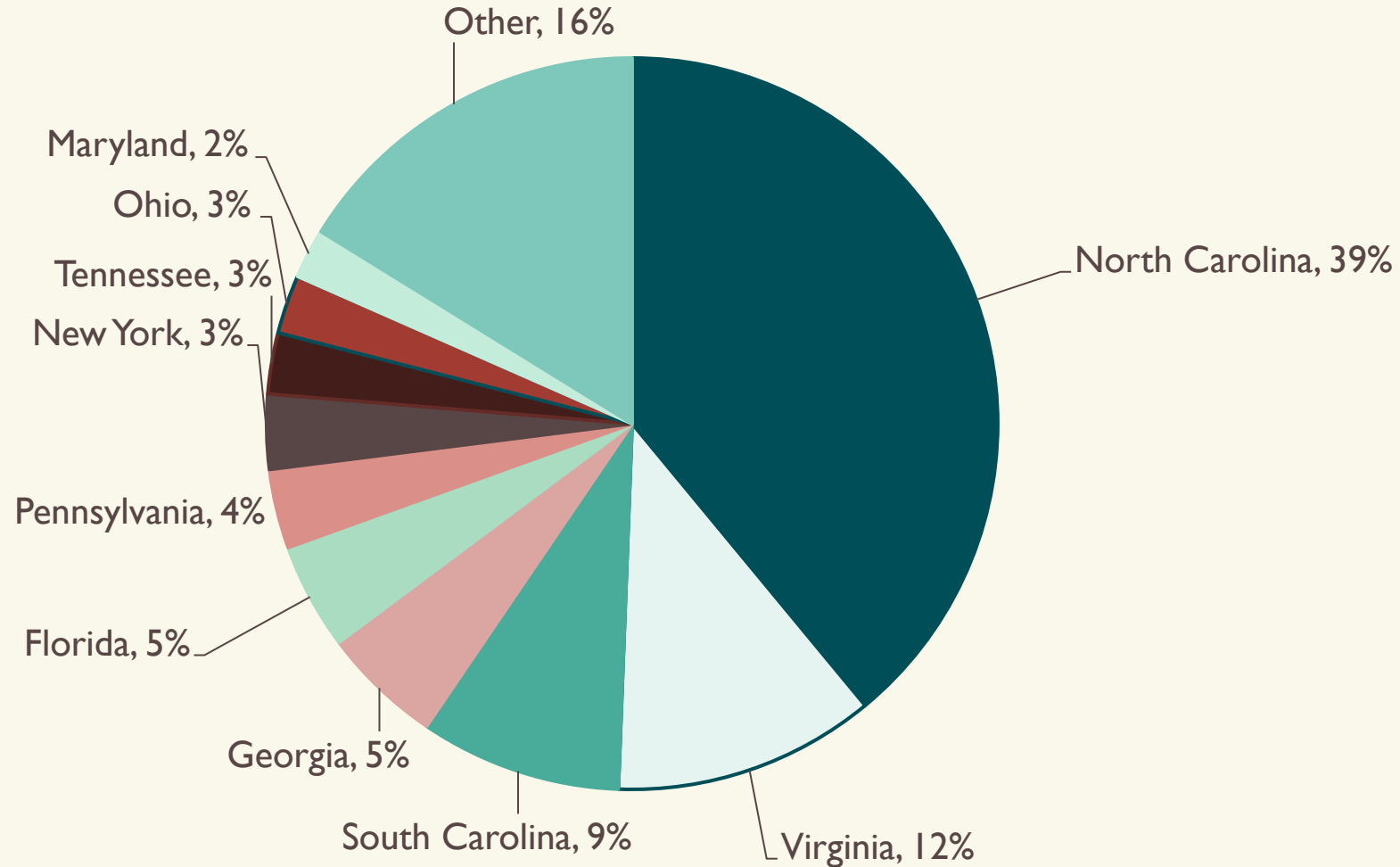
Partnerships Key to Promoting Travel

North Carolina
119 County Partners

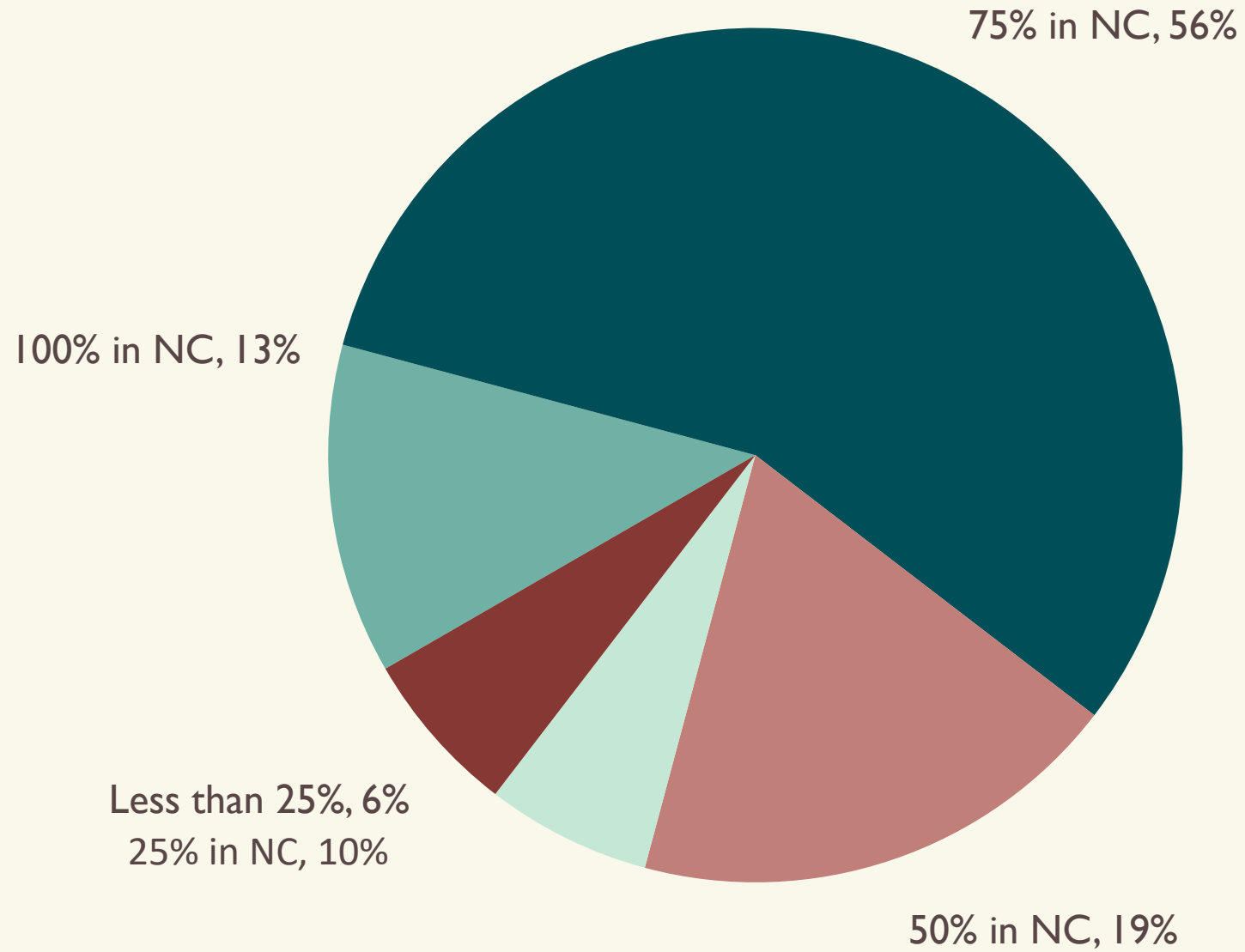
County	Partner
Albemarle	Albemarle Chamber of Commerce
Alamance	Alamance County Chamber of Commerce
Ashe	Ashe County Chamber of Commerce
Avery	Avery County Chamber of Commerce
Bertie	Bertie County Chamber of Commerce
Bladen	Bladen County Chamber of Commerce
Boone	Boone County Chamber of Commerce
Burke	Burke County Chamber of Commerce
Caldwell	Caldwell County Chamber of Commerce
Catawba	Catawba County Chamber of Commerce
Caswell	Caswell County Chamber of Commerce
Carteret	Carteret Chamber of Commerce
Catawba	Catawba County Chamber of Commerce
Chatham	Chatham County Chamber of Commerce
Cherokee	Cherokee County Chamber of Commerce
Clay	Clay County Chamber of Commerce
Cleveland	Cleveland County Chamber of Commerce
Columbus	Columbus County Chamber of Commerce
Crawford	Crawford County Chamber of Commerce
Dare	Dare County Chamber of Commerce
Davidson	Davidson County Chamber of Commerce
DeWitt	DeWitt County Chamber of Commerce
Durham	Durham Chamber of Commerce
Edgecombe	Edgecombe County Chamber of Commerce
Forsyth	Forsyth County Chamber of Commerce
Gaston	Gaston County Chamber of Commerce
Graham	Graham County Chamber of Commerce
Granville	Granville County Chamber of Commerce
Guilford	Guilford County Chamber of Commerce
Henderson	Henderson County Chamber of Commerce
Hoke	Hoke County Chamber of Commerce
Hyde	Hyde County Chamber of Commerce
Iredell	Iredell County Chamber of Commerce
Johnston	Johnston County Chamber of Commerce
Jones	Jones County Chamber of Commerce
Lincoln	Lincoln County Chamber of Commerce
Lenoir	Lenoir County Chamber of Commerce
Madison	Madison County Chamber of Commerce
Martin	Martin County Chamber of Commerce
Mecklenburg	Mecklenburg County Chamber of Commerce
Montgomery	Montgomery County Chamber of Commerce
Morgan	Morgan County Chamber of Commerce
Mitchell	Mitchell County Chamber of Commerce
Nash	Nash County Chamber of Commerce
New Hanover	New Hanover County Chamber of Commerce
Onslow	Onslow County Chamber of Commerce
Orange	Orange County Chamber of Commerce
Person	Person County Chamber of Commerce
Polk	Polk County Chamber of Commerce
Randolph	Randolph County Chamber of Commerce
Rockingham	Rockingham County Chamber of Commerce
Rowan	Rowan County Chamber of Commerce
Stokes	Stokes County Chamber of Commerce
Swain	Swain County Chamber of Commerce
Tyrrell	Tyrrell County Chamber of Commerce
Wake	Wake County Chamber of Commerce
Washington	Washington County Chamber of Commerce
Wayne	Wayne County Chamber of Commerce
Wilson	Wilson County Chamber of Commerce
Yadkin	Yadkin County Chamber of Commerce
Yancey	Yancey County Chamber of Commerce



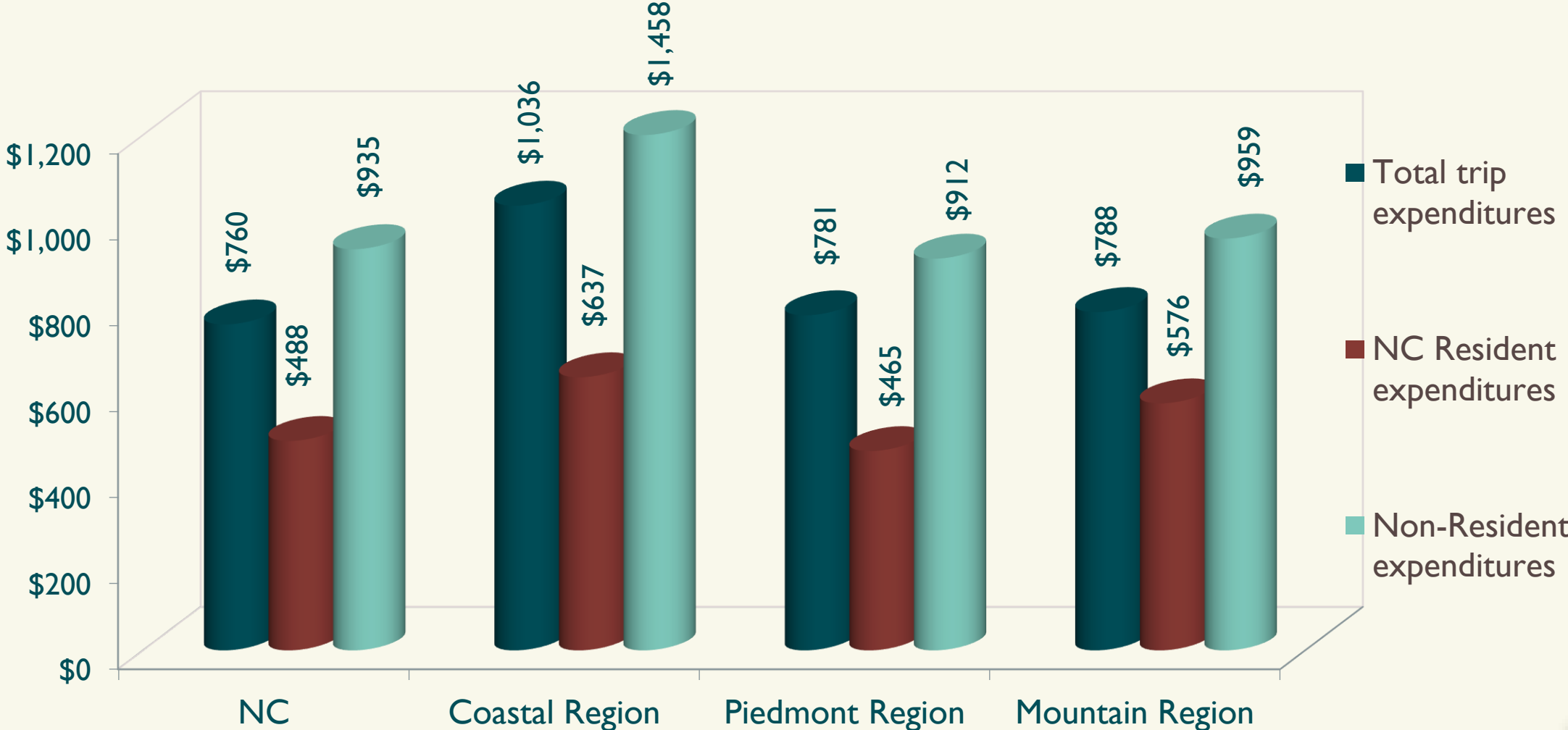
State of Origin of NC Overnight Visitors



Partner Marketing Spend



Average Trip Expenditures



Partnerships Nearly Triple Our Advertising Budget

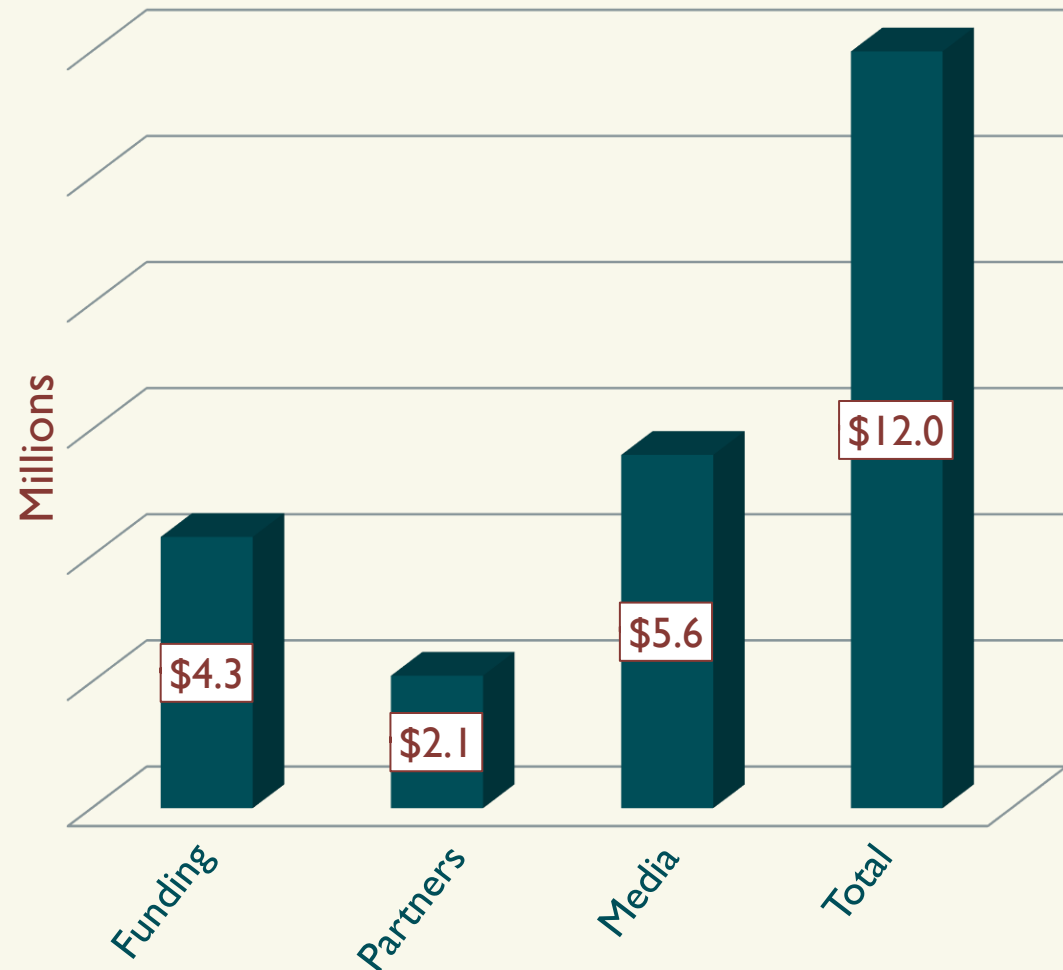
Media Spending

Visit NC Media Budget: \$3,996,741
Partner investment: \$2,137,579
Final Budget: \$6,134,320

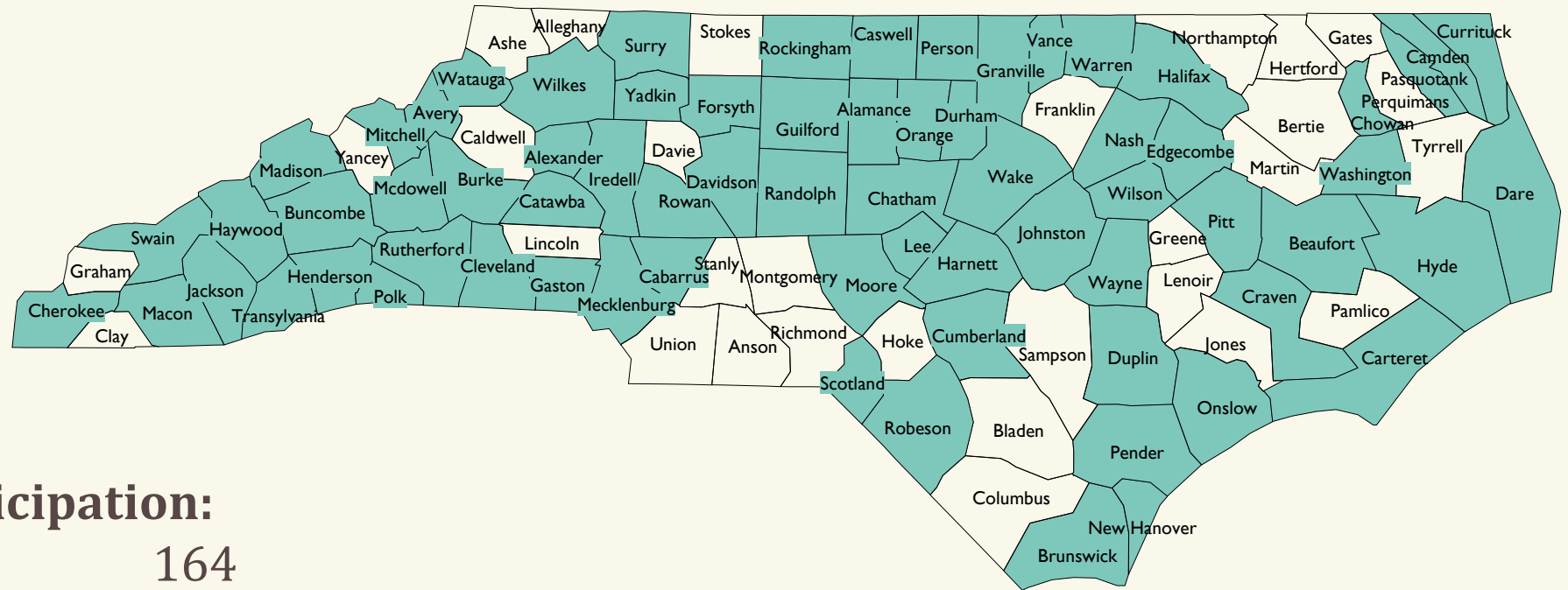
Media Partnerships

Visit NC: \$320,000
Media Partners: \$5,583,834

Total Value: \$12,038,154



Nearly All Counties Join Our Co-op Programs



2019 Partner Participation:

Total Partners:	164
Counties Represented:	70
Tier 1 and 2 Partners:	106
Partner Funds Invested:	\$2,137,629

2019 Final Tourism KPI Results

	Annual Goal	Annual Result	% of Goal
Visitor Spending	\$25.8 Billion	\$26.8 Billion	104%
# of Consumer Inquiries	7.24 million	7.54 million	104%
Tier 1 and 2 Co-op Partners	104	106	102%

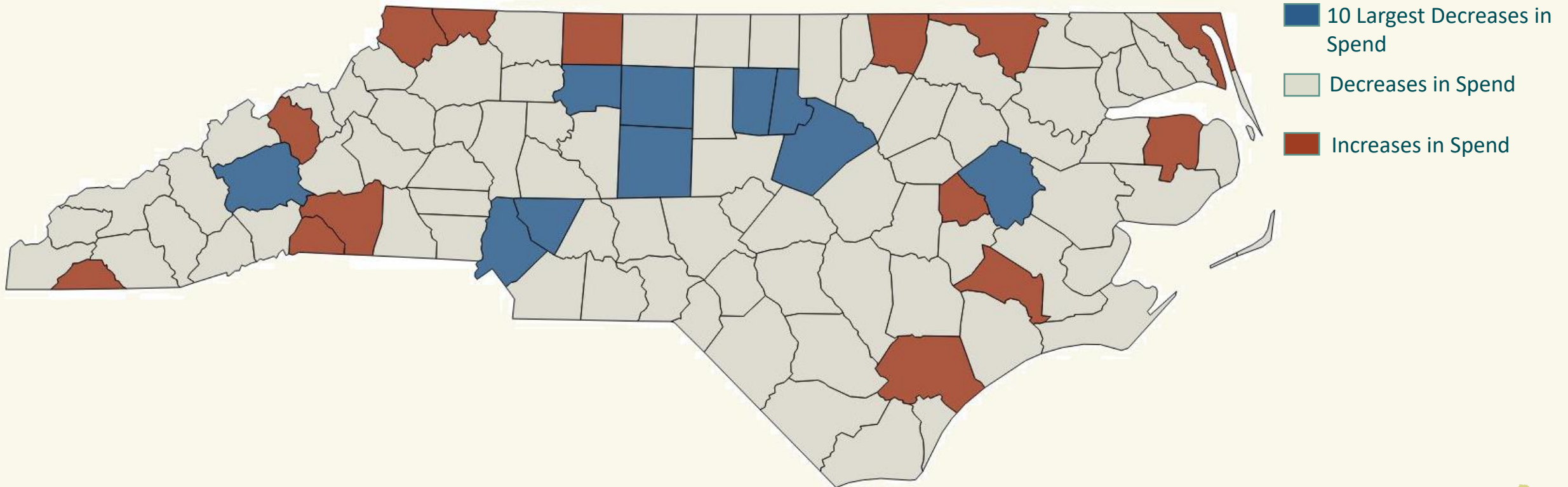
2021	Annual Goal
Arrival Lift	50%
Tier 1 and 2 Co-op Partners	92
External Partner Satisfaction	4.5 out of 5.0

Research

- 2020 County Level Spending
- Current Lodging Data
- Daily Travel Index & YTD KPIs
- Resident Sentiment

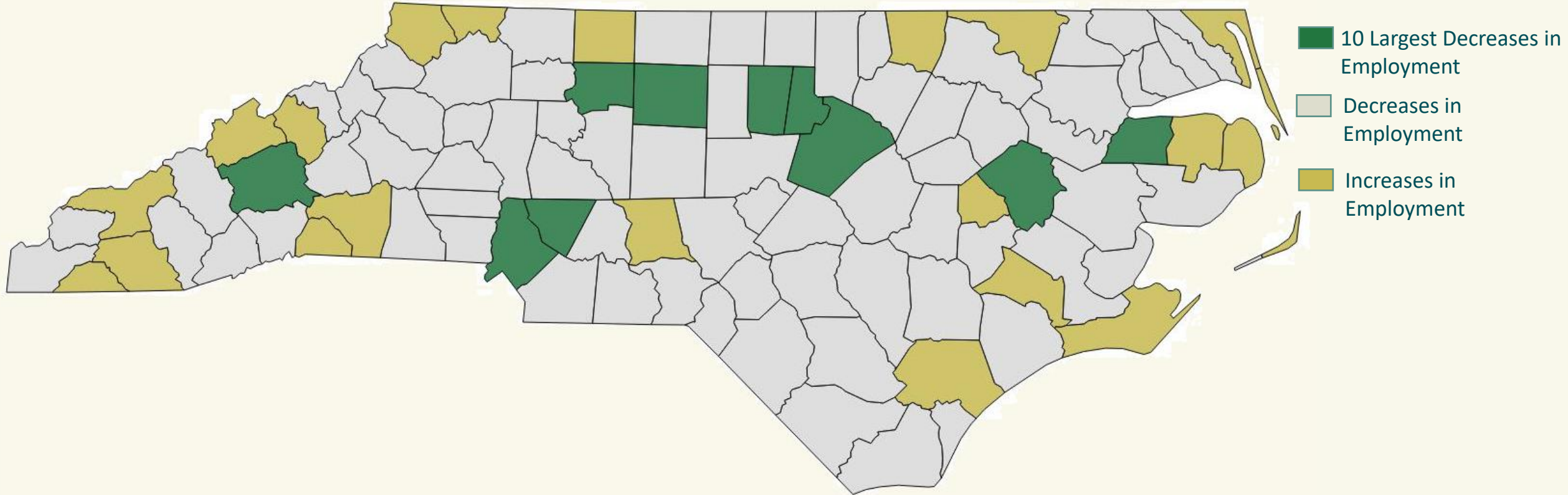
Key Highlights

- Domestic and international visitors to NC in 2020 spent \$19.96 billion, a decrease of 32 percent from 2019
- 86 of the state's counties experienced decreases in visitor spending, and as expected, metropolitan areas of the state had the largest decreases in visitor spending in 2020
- However, there were a few positives in the county data. 14 counties had increases in visitor spending



Key Highlights

...and 20 counties had increases in direct tourism employment

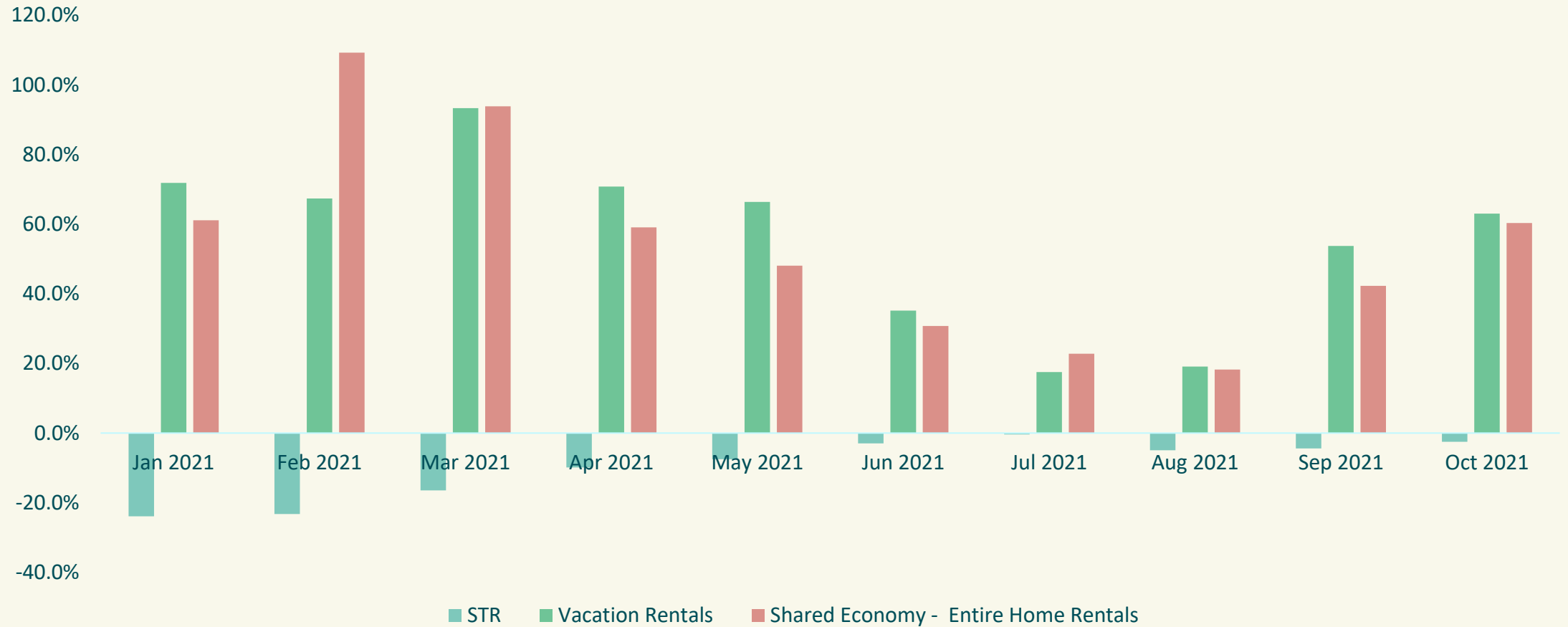


YEAR-TO-DATE 2021 INDICATORS

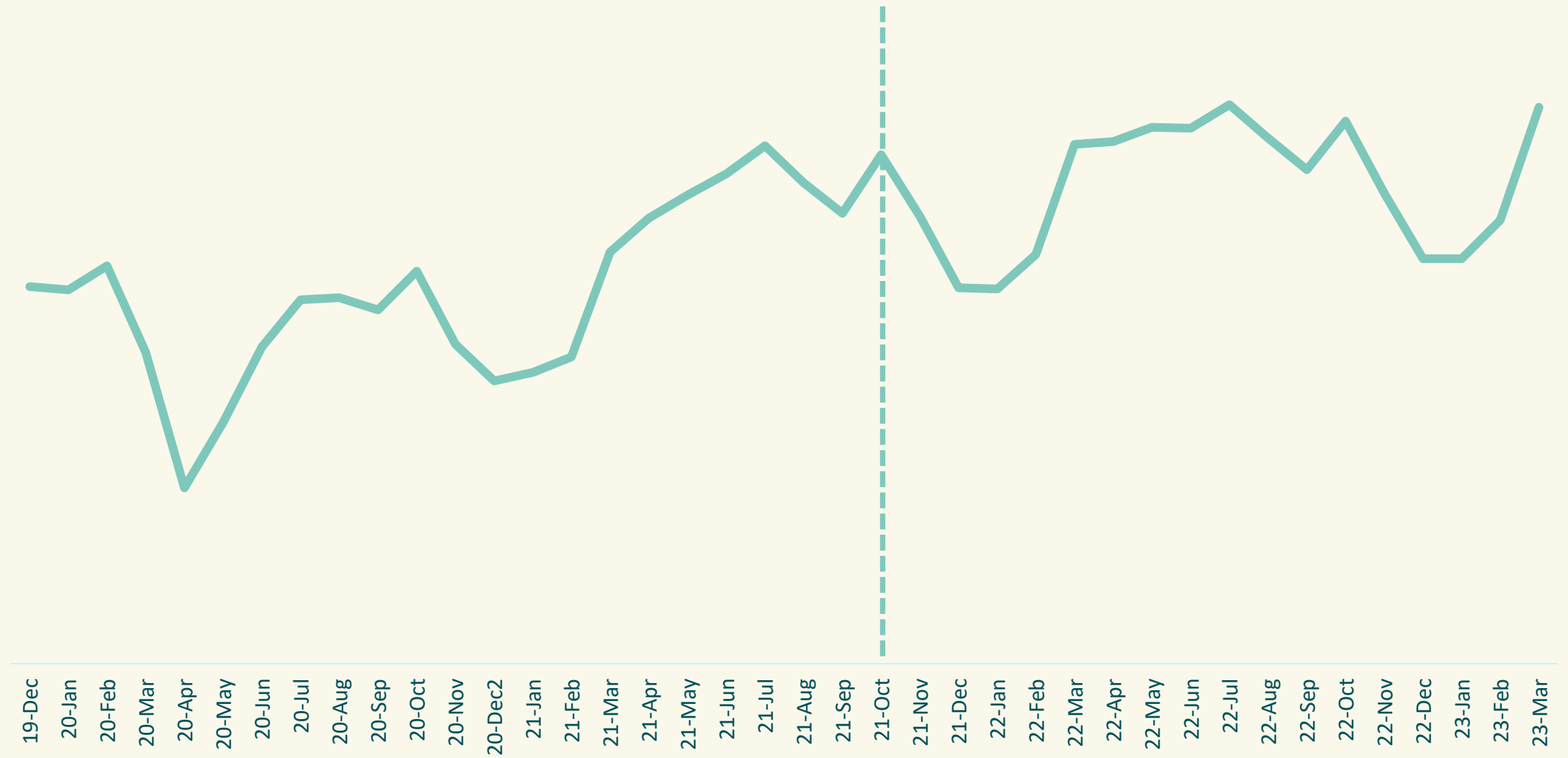
Lodging Analysis — Year-to-Date through October 2021

	Commercial	Shared Economy – Entire Home Rentals	Vacation Rentals
Demand (room nights booked)	+32.5%	+20.3%	+23.6%
Revenues	+52.0%	+27.2%	+34.3%

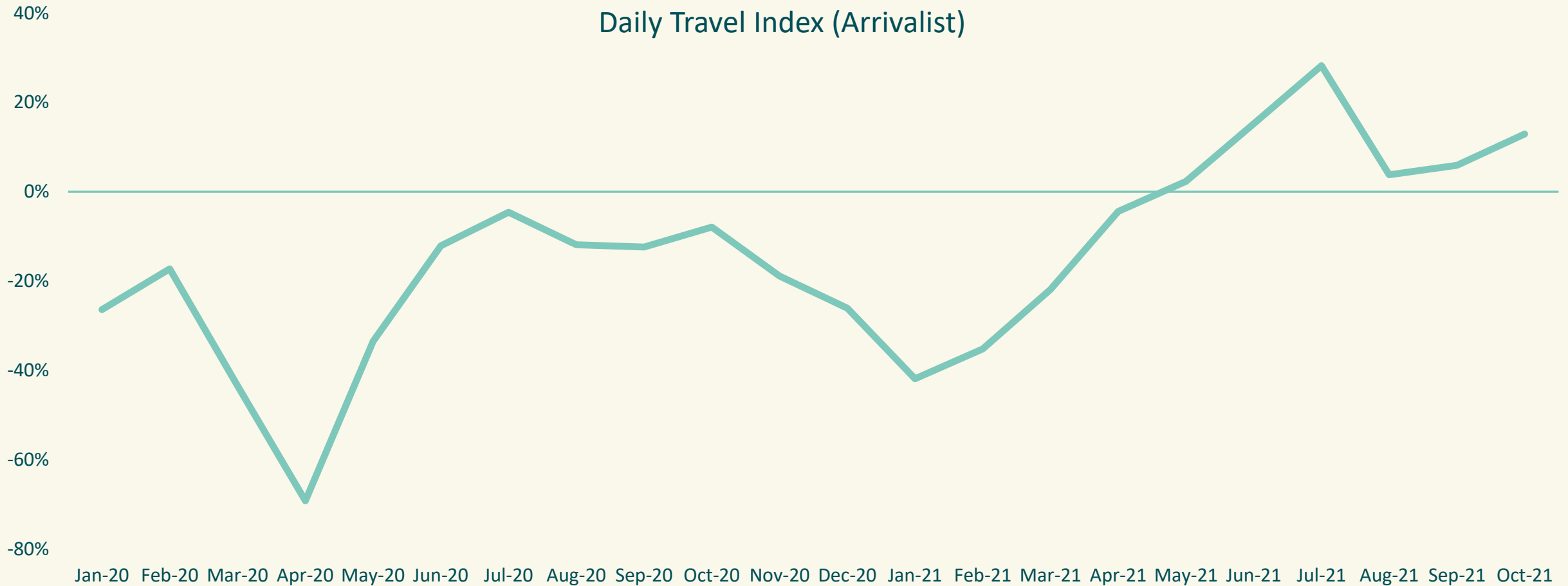
Lodging Demand Recovery — Year-to-Date Compared to 2019



Commercial Lodging (Demand) Forecast



Daily Travel Index Projection of Trips 2020-2021



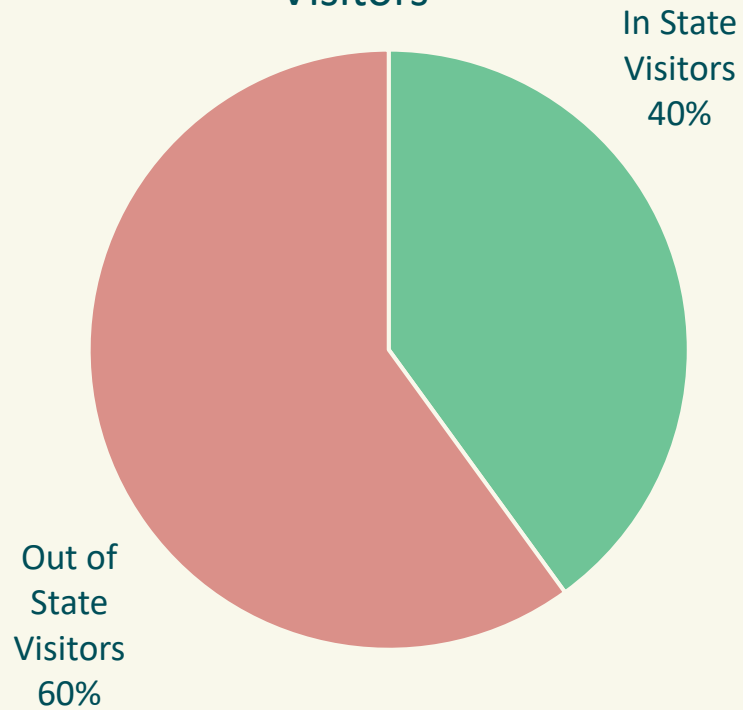
Daily drive market analysis of US travelers who moved at least 50 miles from their home and spent a minimum of 2 Hours on their journey. The Daily Travel Index is the relative daily volume of travelers compared to the average number of daily travelers Jan 01, 2019 to Dec 31, 2019. The Daily Volume is a projection of trips taken by a weighted panelist cohort.

Last Updated: October 26th, 2021

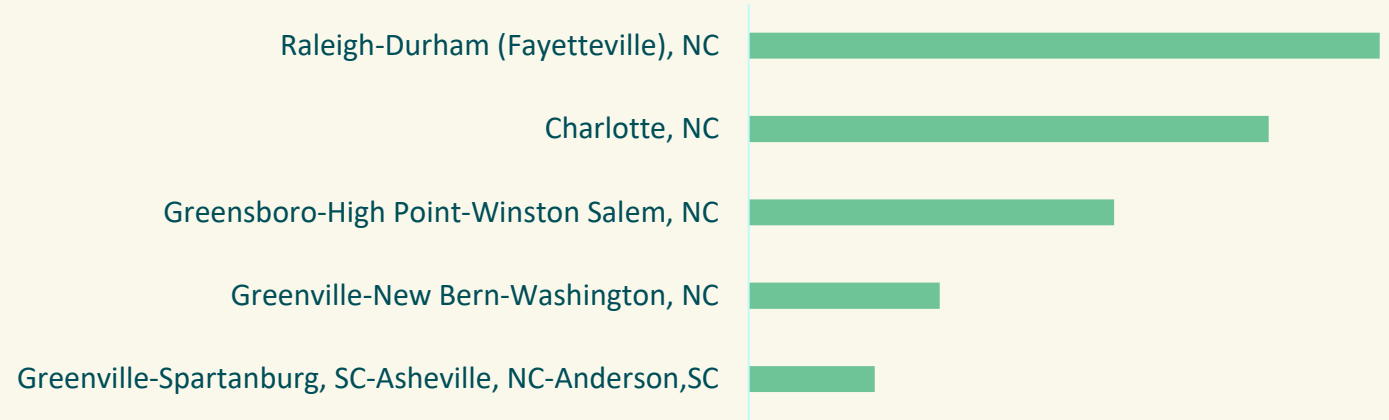


2021 YTD Visitation Trends

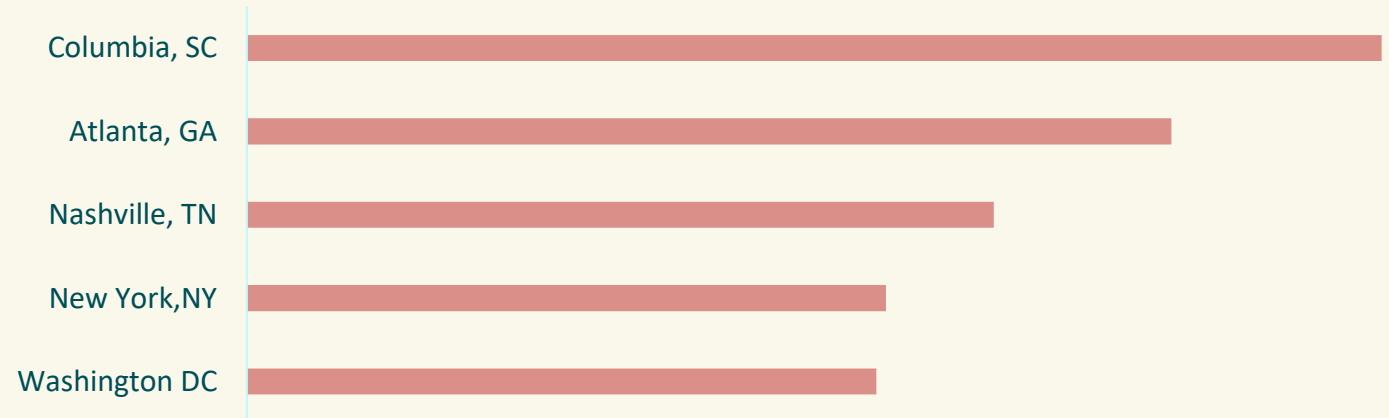
In-State vs. Out-of-State Visitors



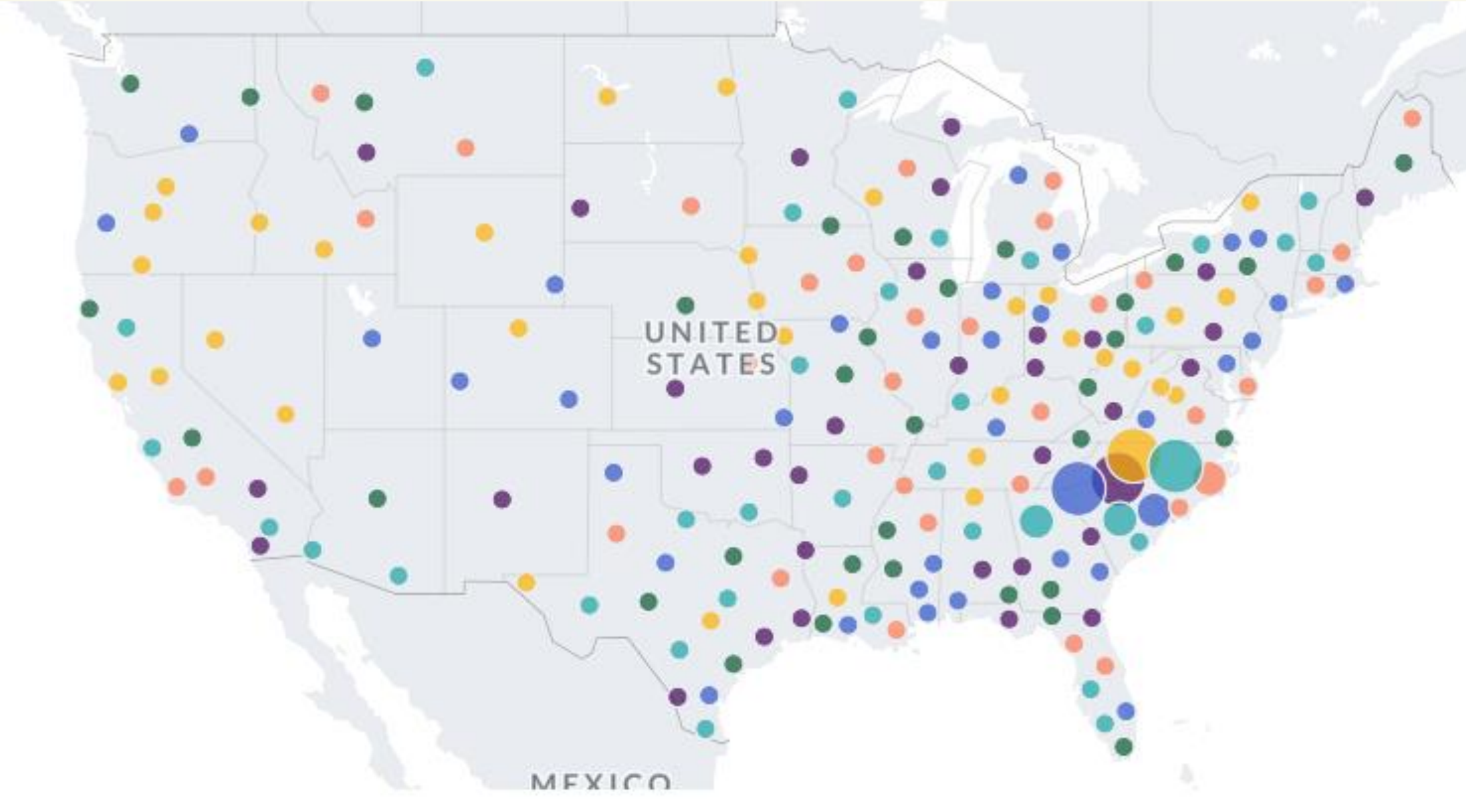
Top 5 In-State Origin Markets



Top 5 Out-of-State Origin Markets

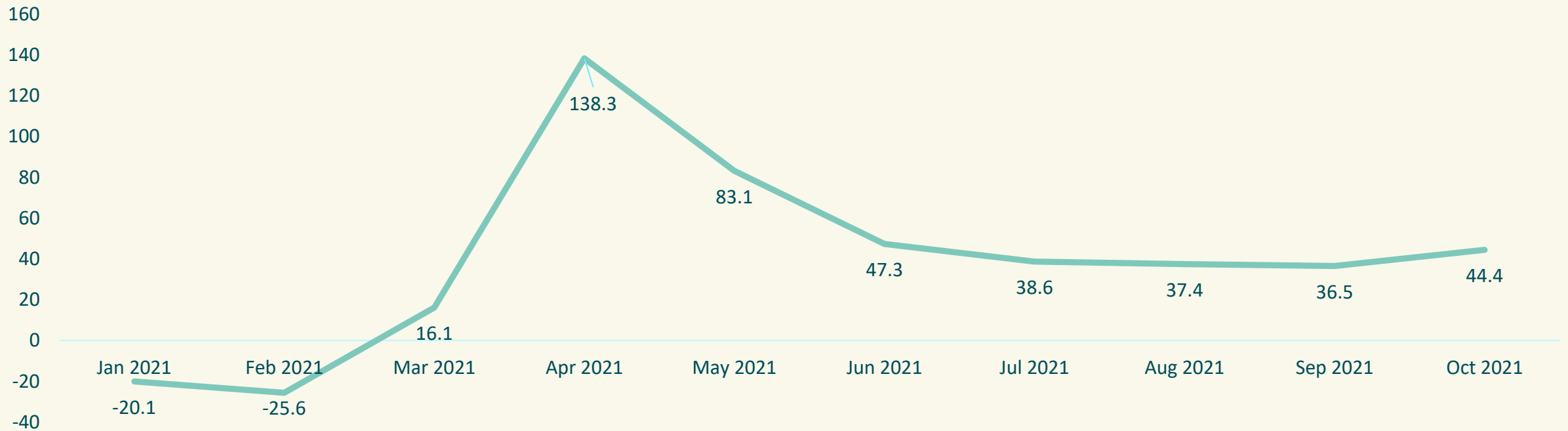


Visitation By Origin Market



2021 Year-to-Date Visitor Economy Index

+42.2%



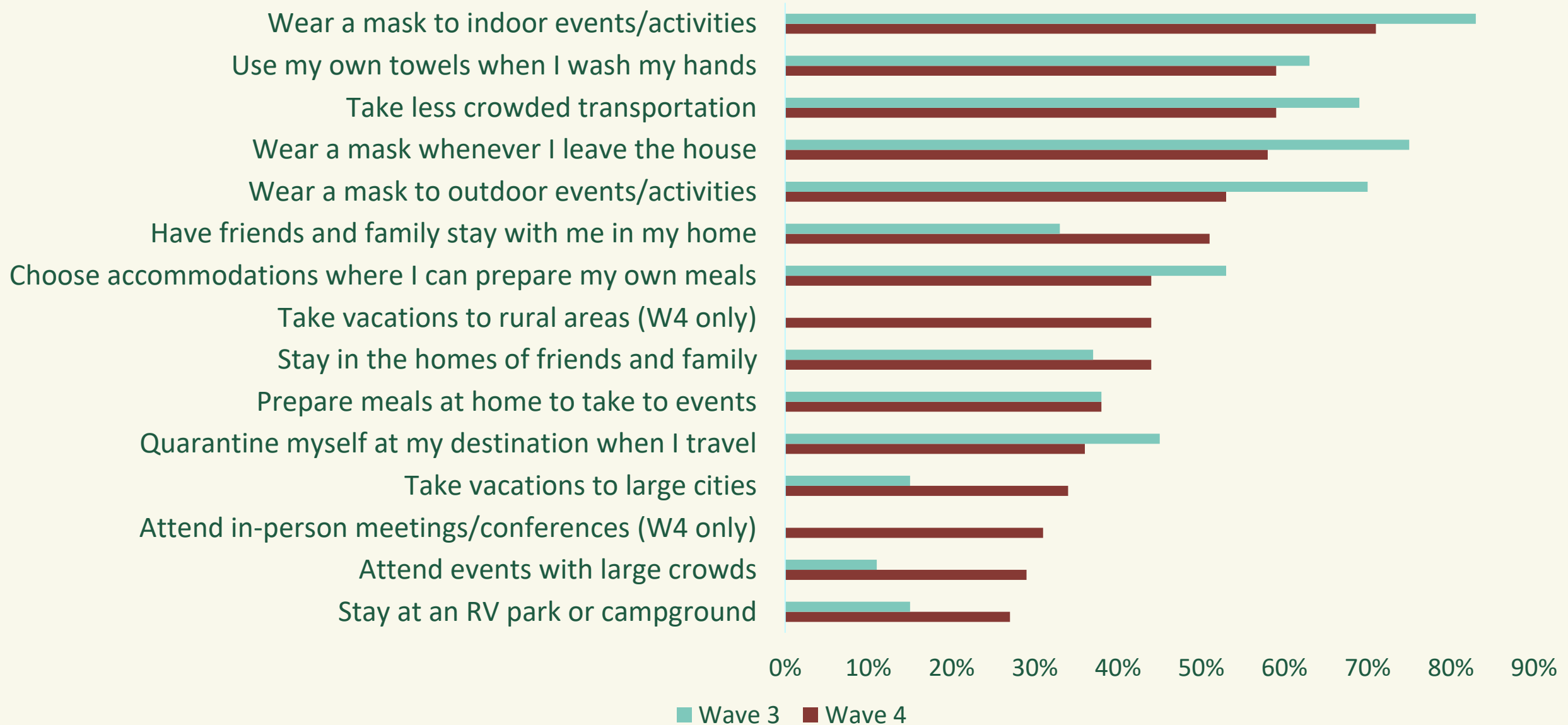
Visitor Economy Index is comprised of commercial lodging demand and revenues, AirDNA demand and revenues, available credit card data and visitor device counts



NC Resident Sentiment Study — Wave 4 October 2021

- Random sample of 1,200 North Carolina residents balanced to the population of NC
- Designed to track resident sentiment toward tourism in the wake of COVID-19

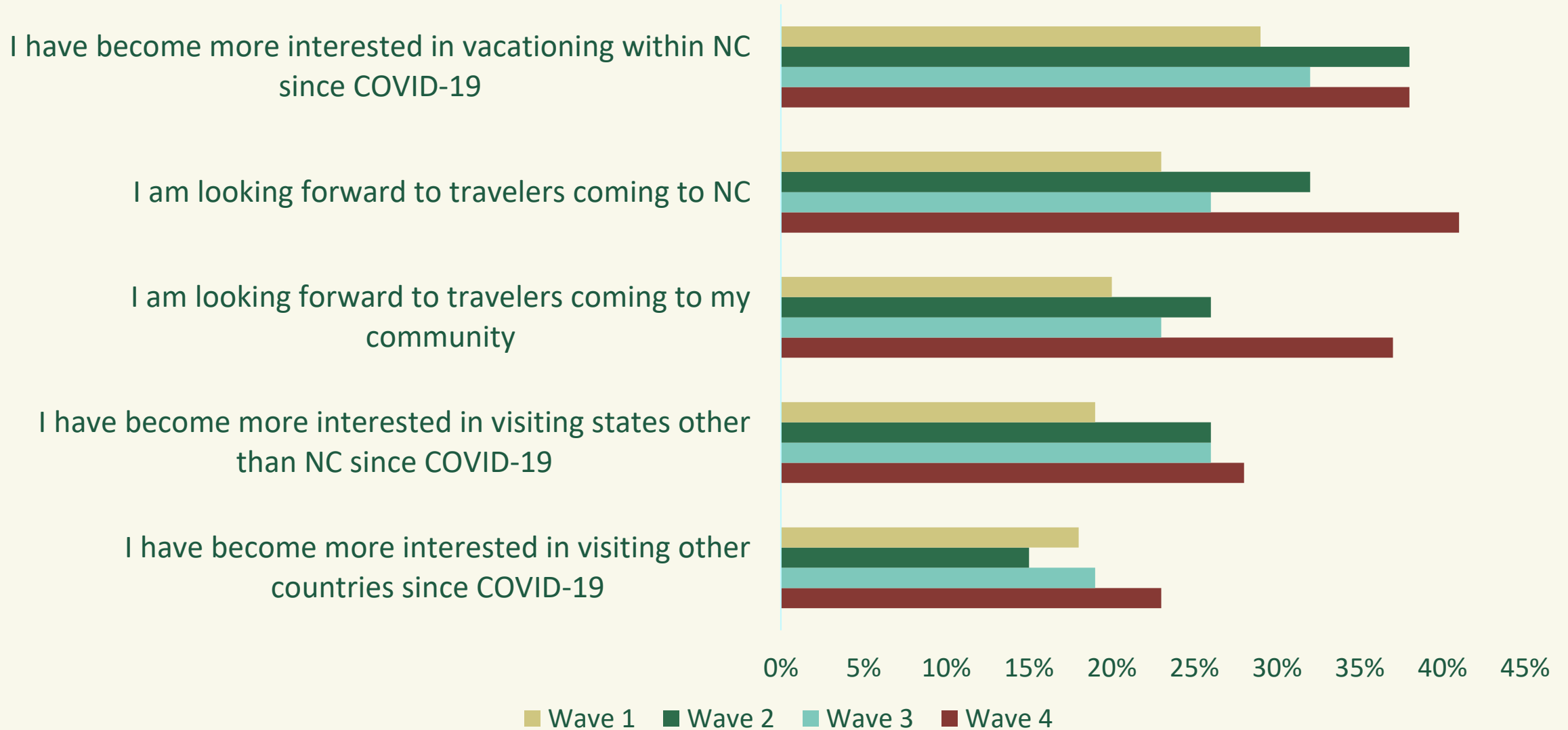
Activities/Actions as a Result of COVID-19



As a result of your COVID-19 experience, please indicate how likely you are to do each of the following.



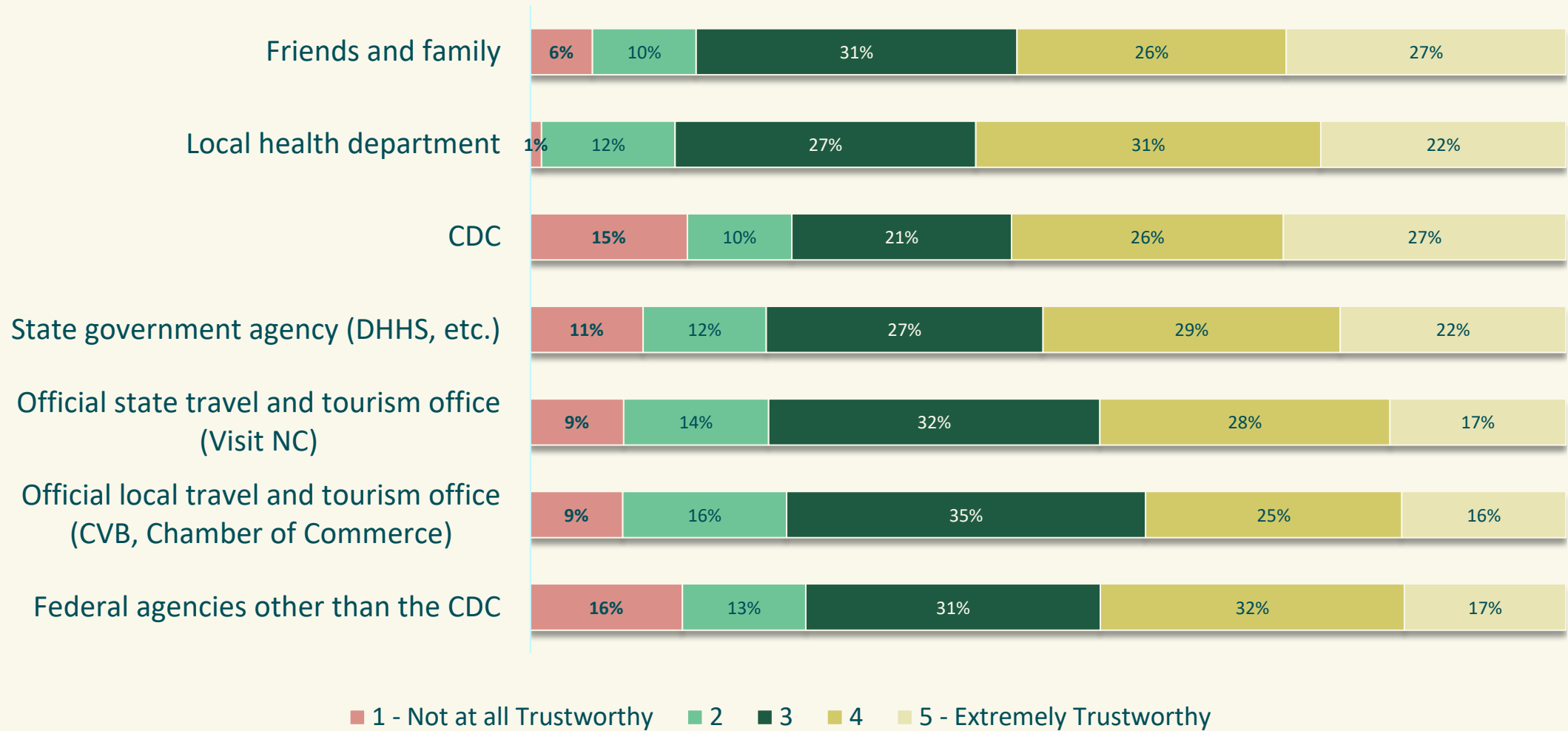
Interest in Travel to NC



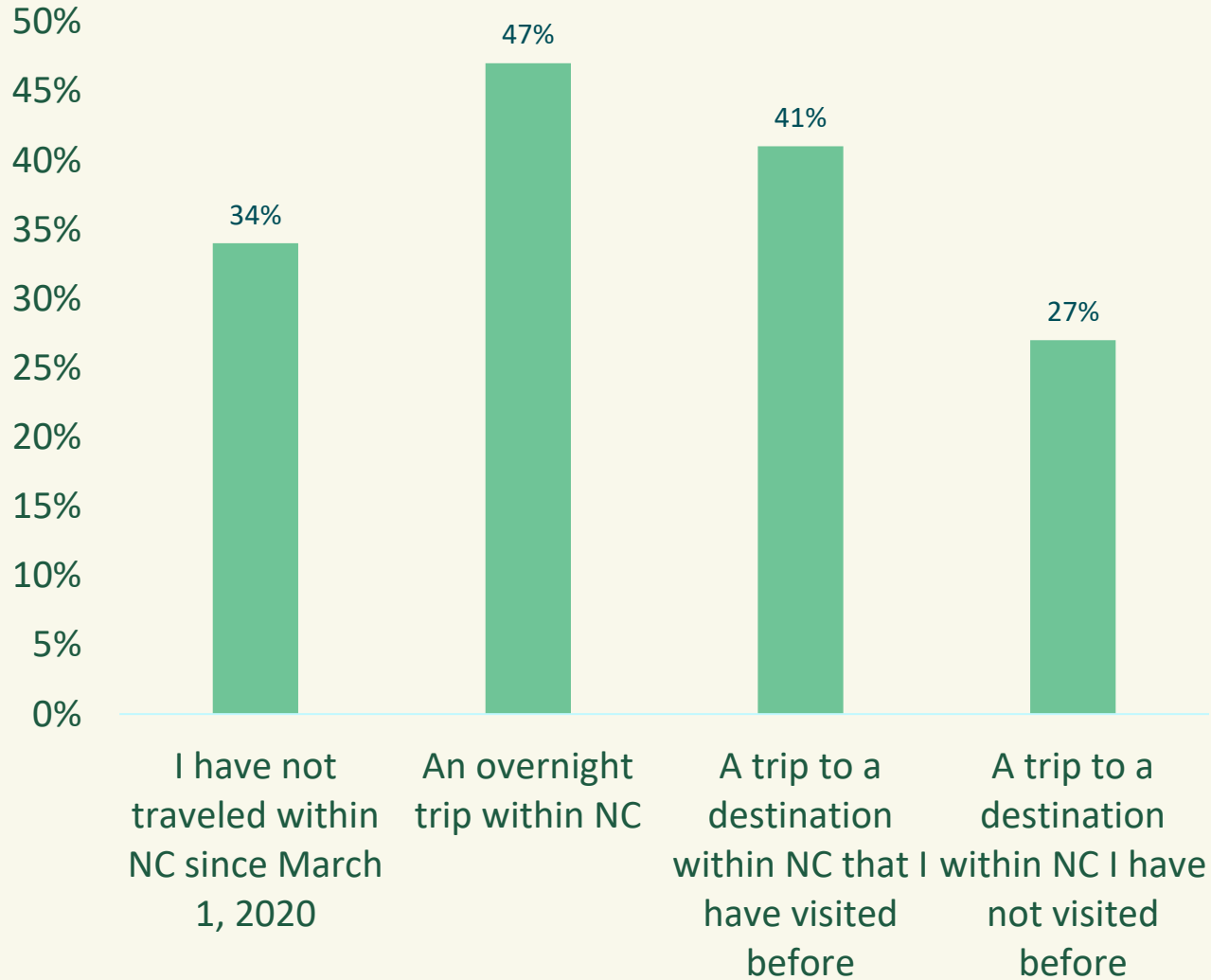
Please indicate your level of agreement with each of the following statements now that the NC COVID-19 restrictions are beginning to ease.



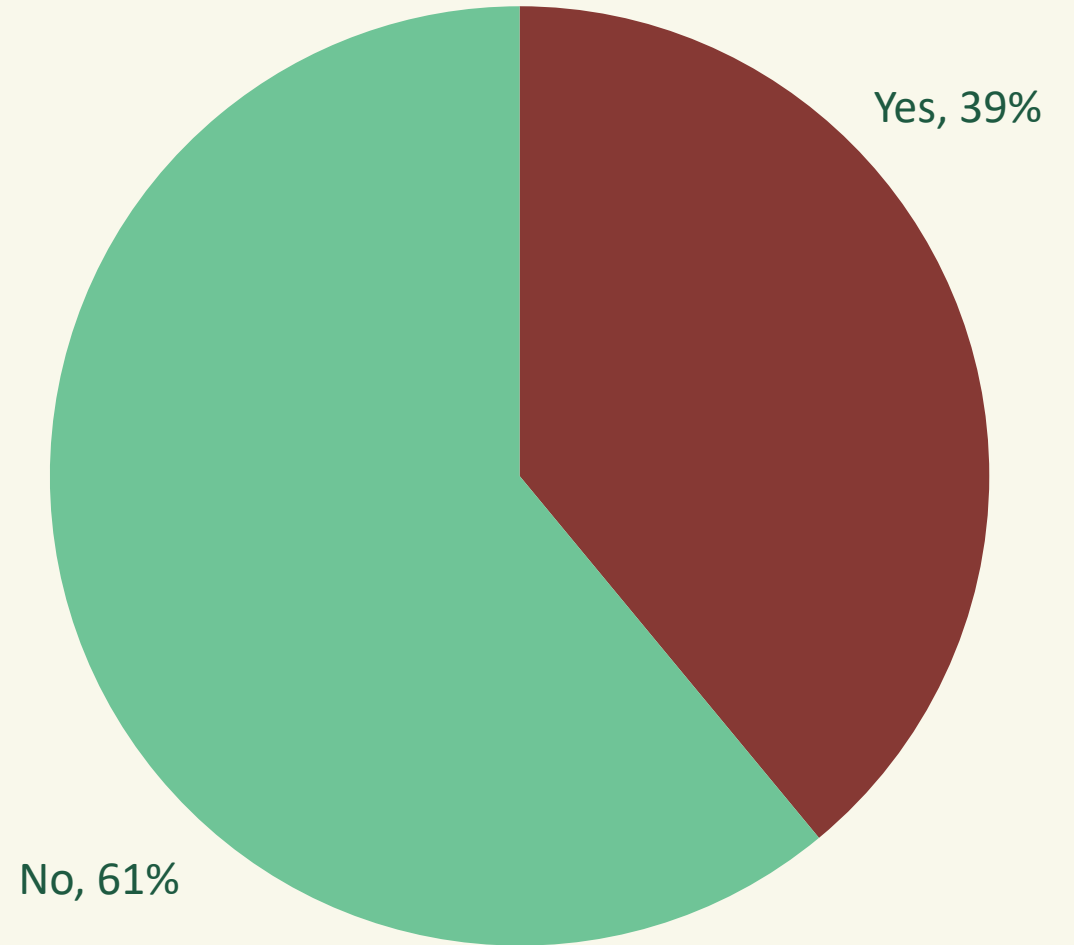
Trust in Planning Travel



Pandemic Travel



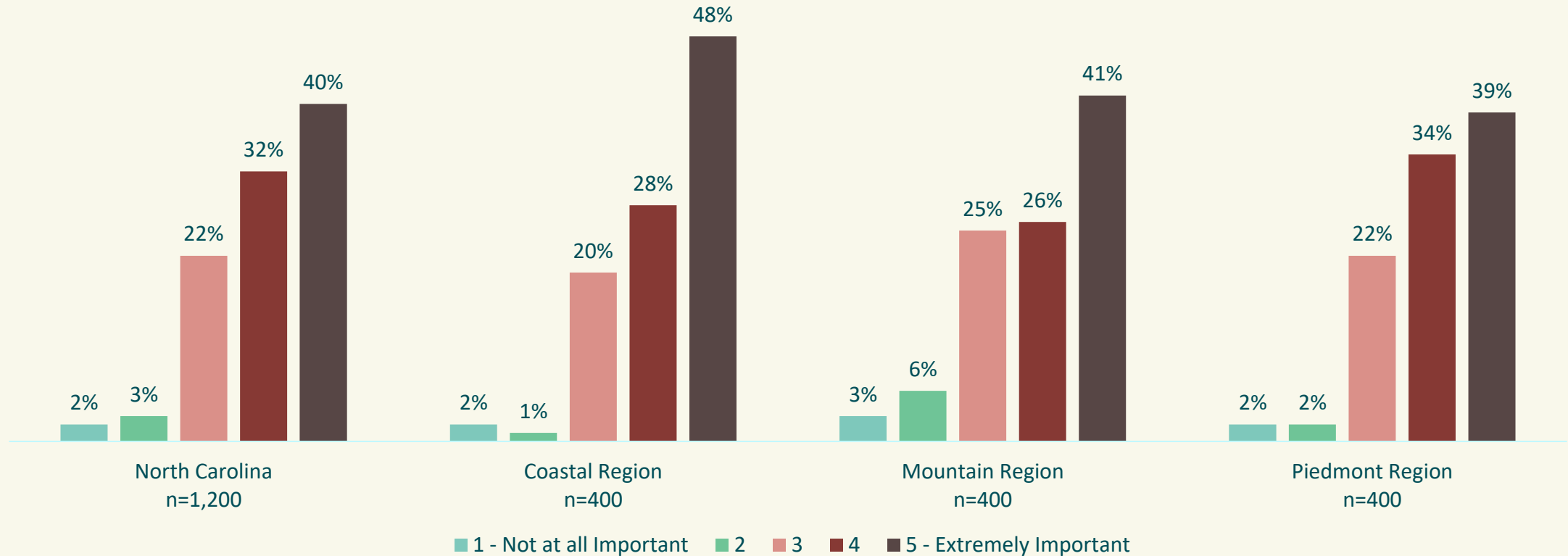
Since March 1, 2020, have you taken any of the following types of trips?



Do you currently have an overnight trip within NC planned between now and December 31, 2020?



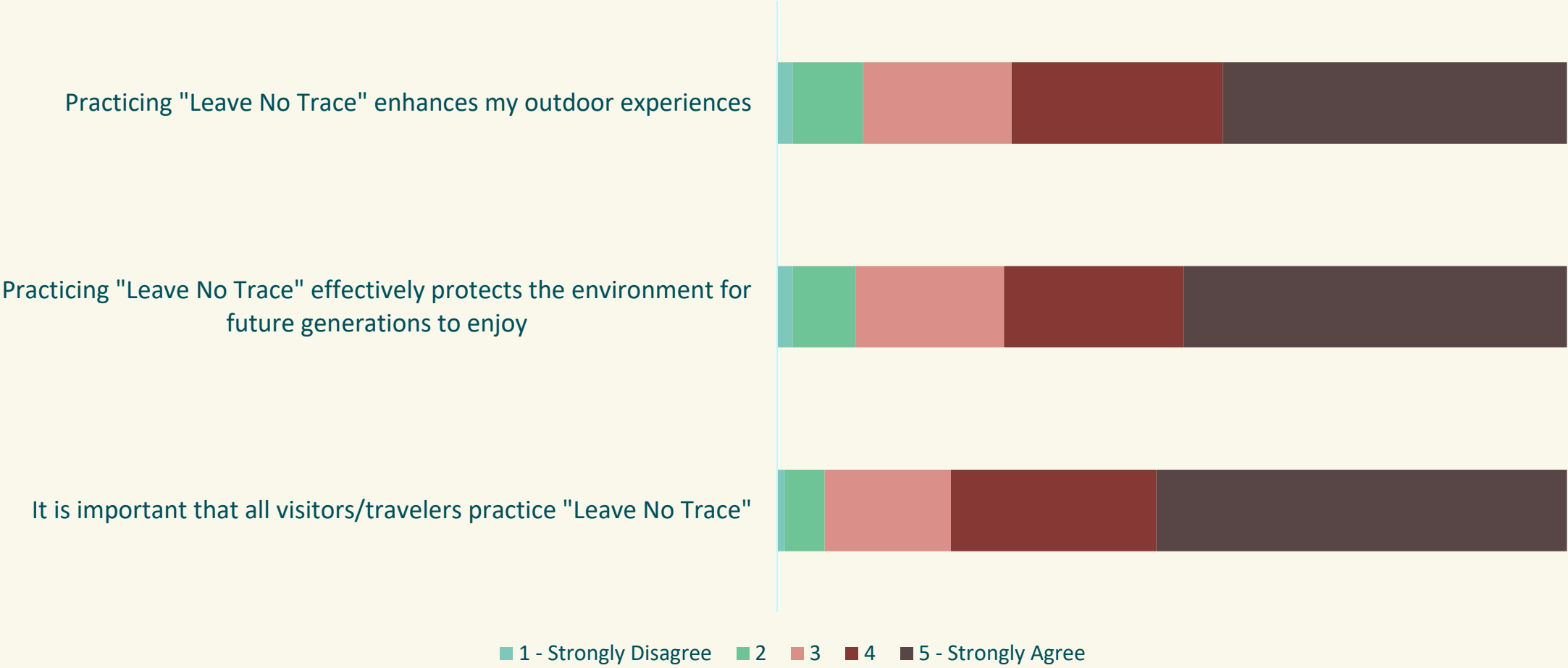
Perceived Importance of Tourism to Recovery



Using a scale of 1 (not at all important) to 5 (extremely important), how important do you think tourism is to the recovery of the North Carolina economy after COVID-19?



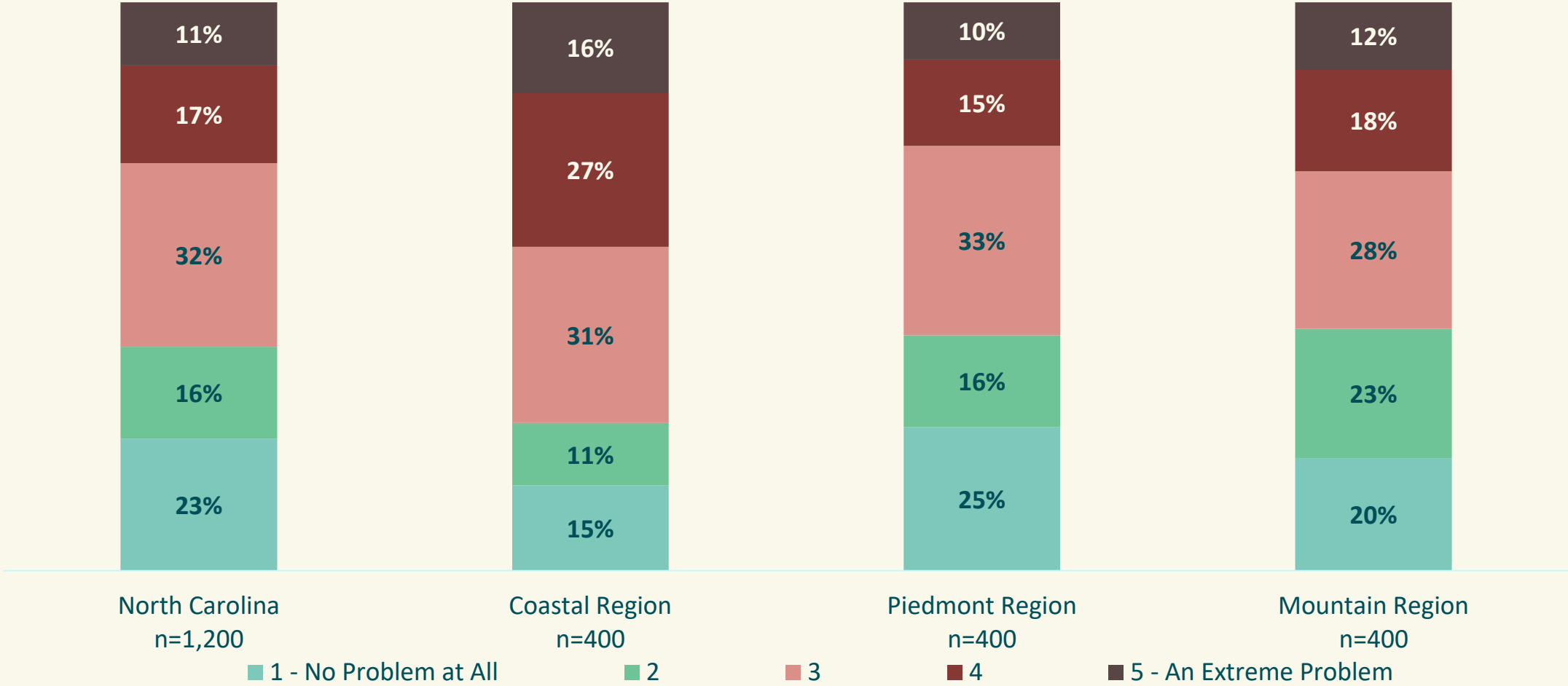
Importance of “Leave No Trace” & Protection of Environment



Using a scale of 1 (strongly disagree) to 5 (strongly agree), please indicate your level of agreement with each of the following statements.



Perception of Over-Tourism

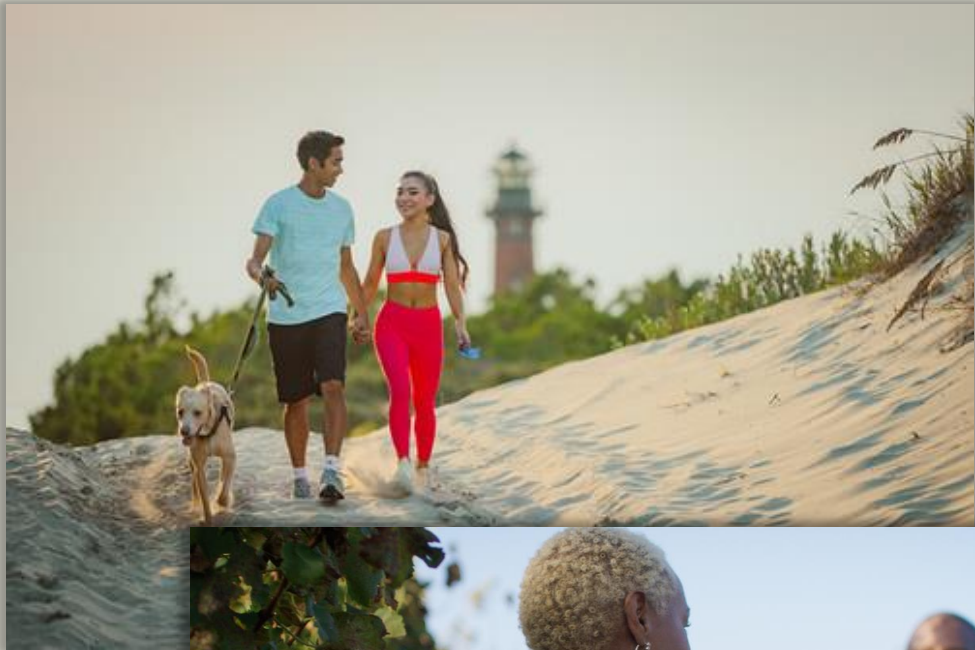


Using a scale of 1 (no problem at all) to 5 (an extreme problem), please indicate how much of a problem you think over-tourism is to your community. Over-tourism is defined as the perceived congestion or overcrowding from an excess of tourists, resulting in conflicts with locals.



MARKETING — MOVING FORWARD

FIRSTS THAT LAST, OUTDOOR NC, RETIRE NC & MORE



FIRSTS THAT LAST 2.0 | FTL FILM FESTIVAL

12 independent documentary filmmakers

Sharing real NC experiences and memories

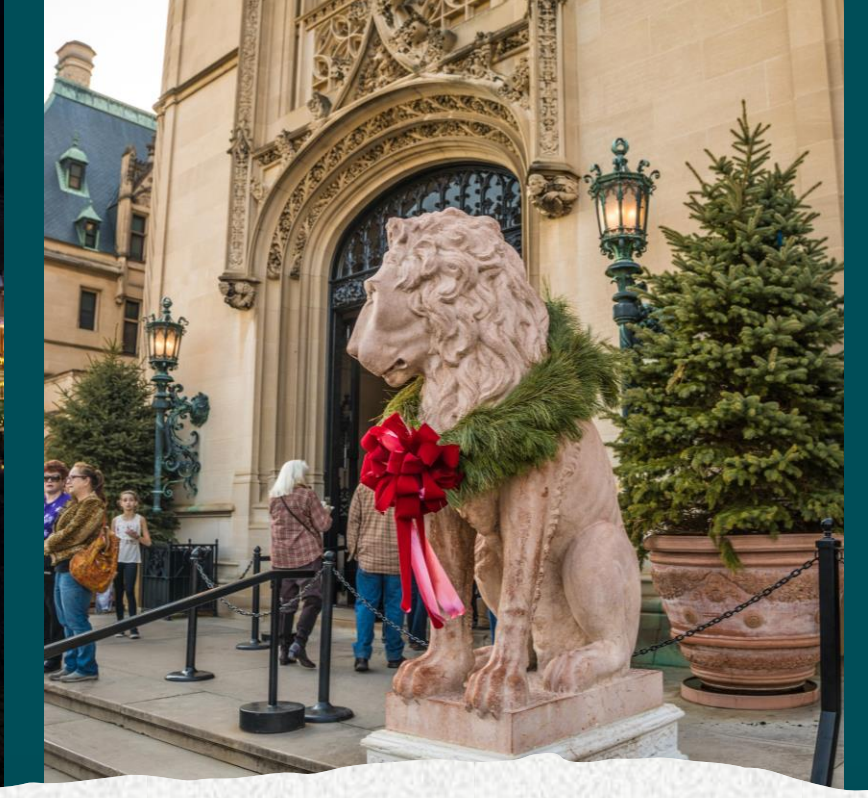
12 short films

Firsts That Last Film Festival held virtually

Consumer promotion and participation, sharing their own firsts and lasting memories traveling NC
VisitNC.com

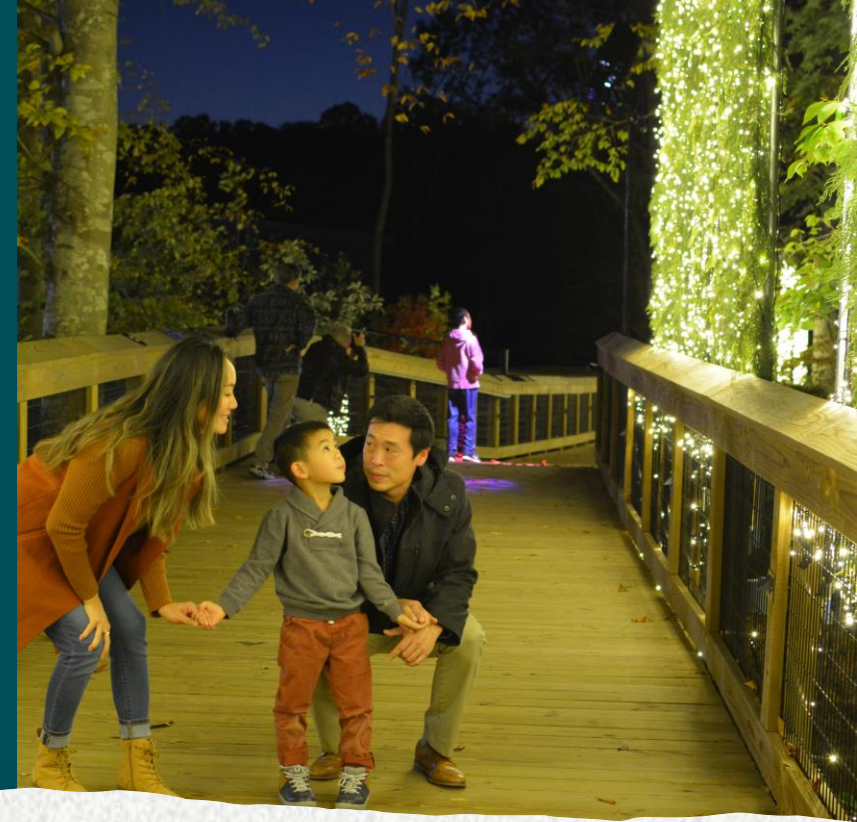


HOLIDAY TRAVEL



Holiday Season in NC

- Biltmore Christmas – through Jan 9, 2022
- Tweetsie Christmas – through Dec 30
- Polar Express – through Dec 31 at Great Smoky Mountains Railroad in Bryson City
- Winter Lights – through Jan 2, 2022 at North Carolina Arboretum in Asheville
- National Gingerbread House Competition – through Jan 2, 2022 at the Omni Grove Park Inn in Asheville



Holiday Season in NC

- Christmas Town USA (McAdenville) – through Dec 26
- Speedway Christmas – through Jan 16, 2022
- Winter Wonderlights (Greensboro Science Center) – through Jan 2, 2022
- Tanglewood Park Festival of Lights – through Jan 1, 2022
- Winterfest at Carowinds – through Jan 9, 2022
- Holiday in the Gardens (Daniel Stowe Botanical Gardens/Belmont) – through Jan 2, 2022
- Kersey Valley Christmas (Archdale) – through Dec 23

Holiday Season in NC

- Winter Lights – through Jan 16 at Elizabethan Gardens (Manteo)
- Enchanted Airlie – through Dec 22 at Airlie Gardens (Wilmington)

