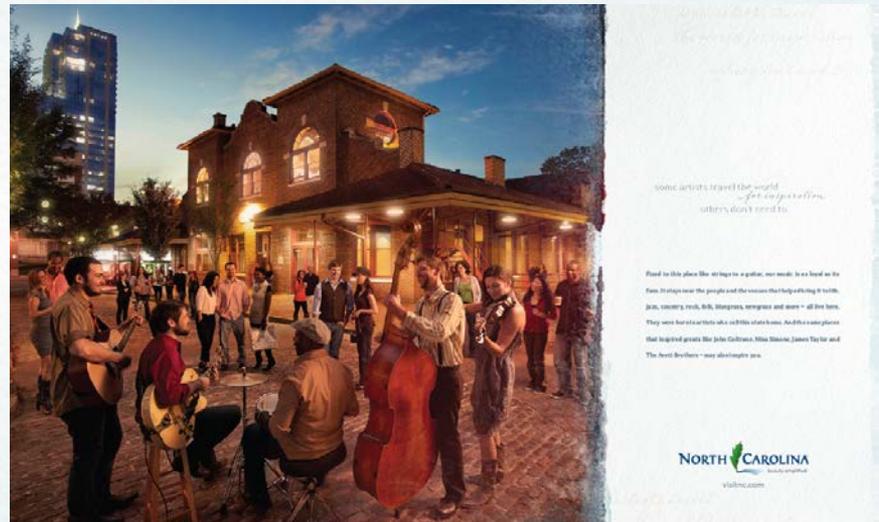


N.C. DIVISION OF TOURISM, FILM & SPORTS DEVELOPMENT OVERVIEW

HEIDI WALTERS
N.C. DIVISION OF TOURISM

PROGRAM GOALS

- More people, staying longer, spending more money
- Strategic marketing investments
- Leveraging resources through partnerships



MEASURING SUCCESS

Visitor research (demographics, activities, attitudes)

Economic impact

ROI/attitude and awareness

Web analytics

Social engagement

Partner investment



2013 RECORD YEAR FOR NC TOURISM

\$20.2 Billion in Visitor Spending

Nearly 200,000 Jobs

\$1 Billion in State Tax Revenues

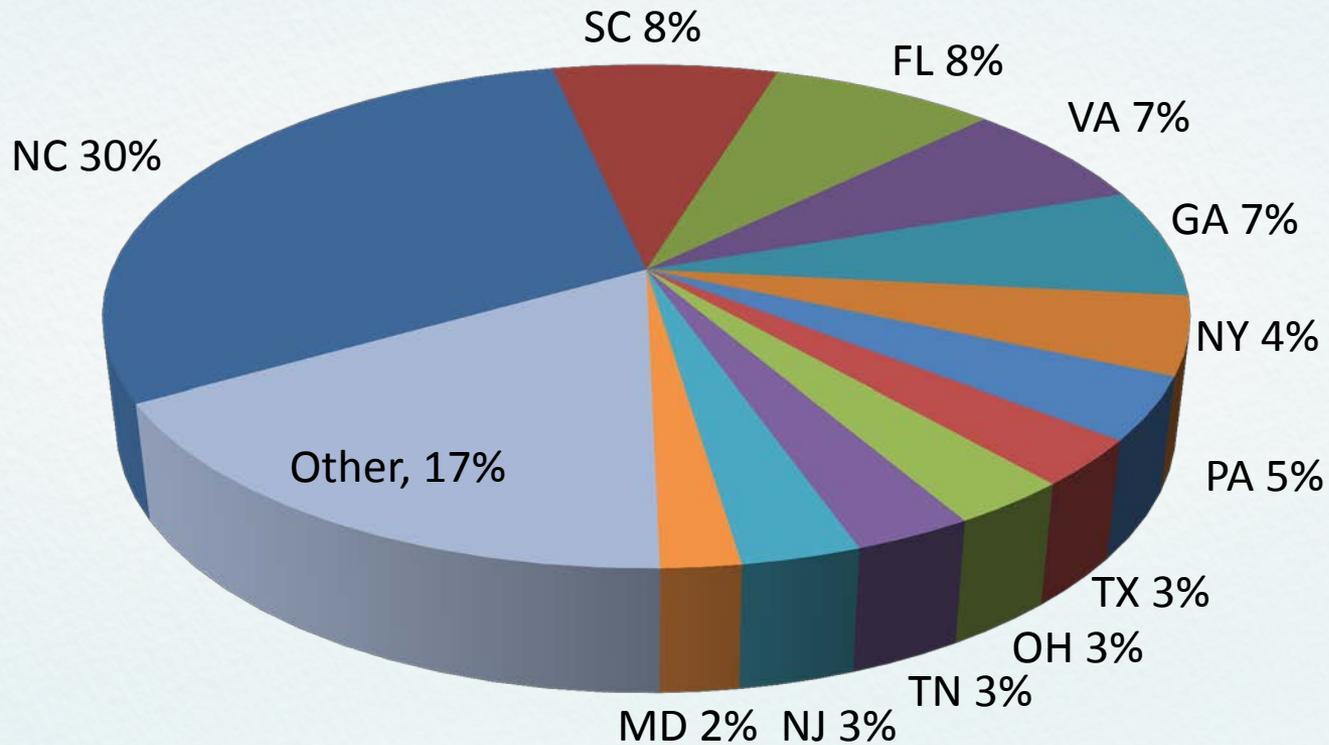
\$597 Million in Local Tax Revenues

Visitors contribute \$4.4 Million Per Day in State and
Local Tax Revenues

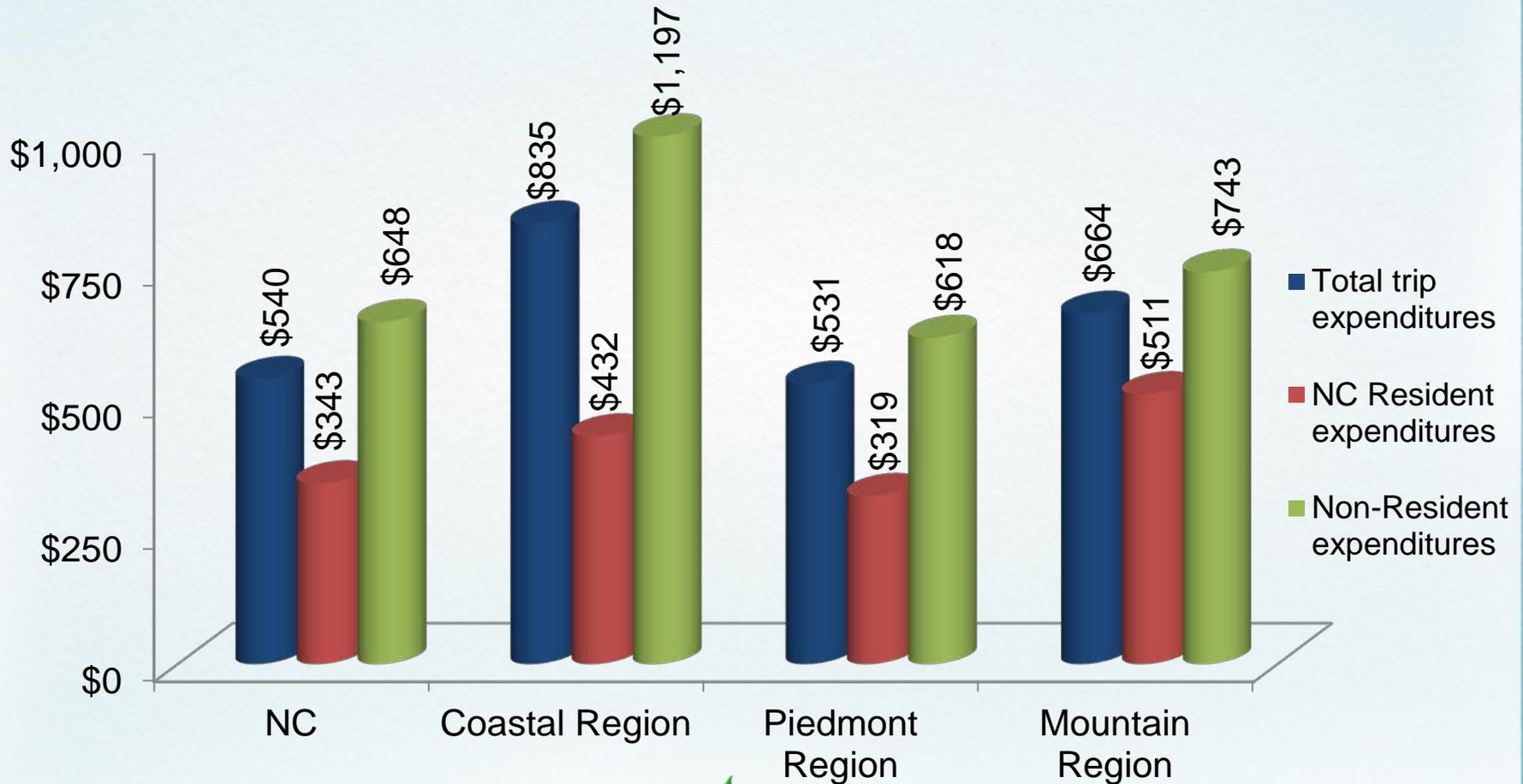
NC Households save \$435 in taxes due to visitor spending



STATE OF ORIGIN OF NC OVERNIGHT VISITORS



AVERAGE TOTAL TRIP SPENDING BY OVERNIGHT VISITOR PARTIES

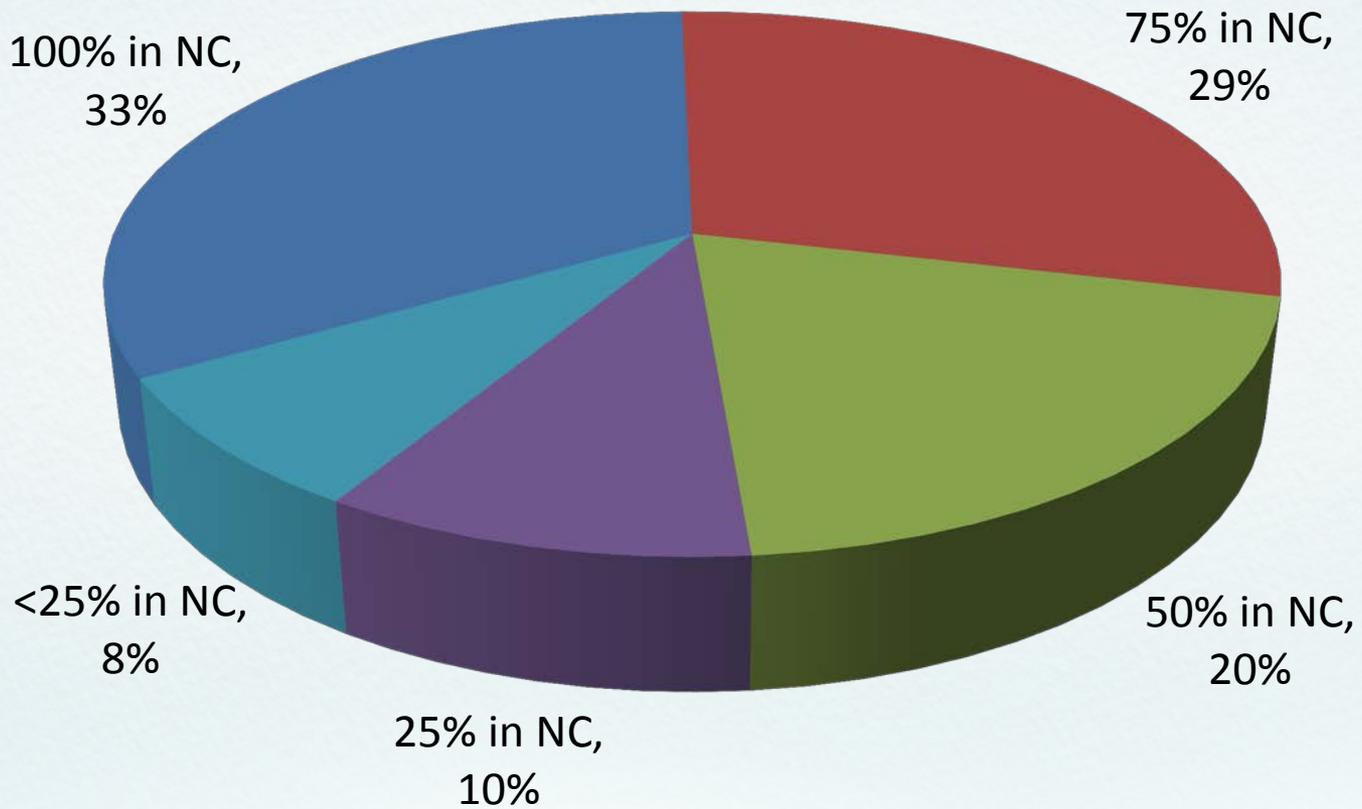


TOURISM TAX COLLECTIONS

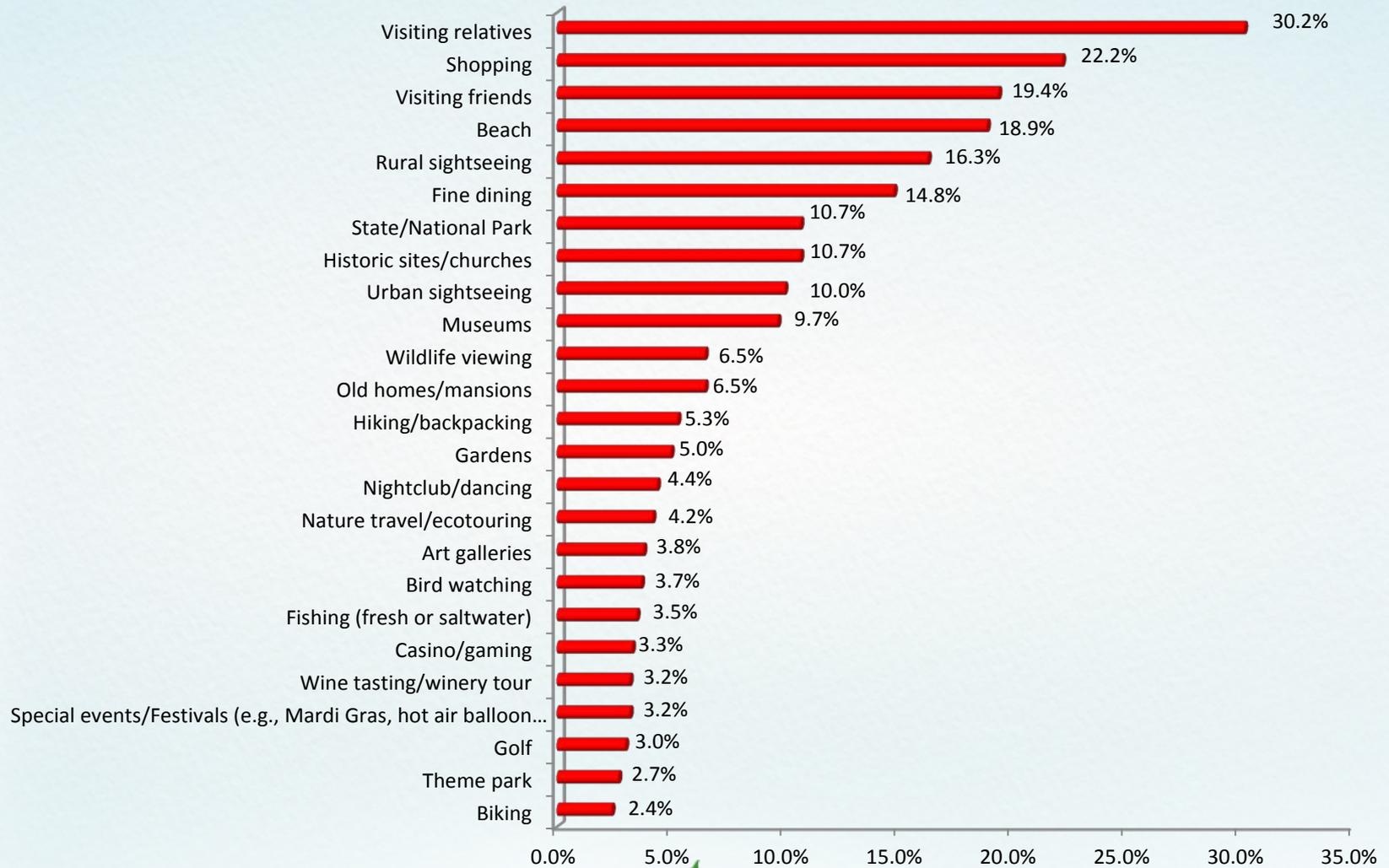
Counties and municipalities	Rate	County collections				Municipal collections				
		Total net collections	Amount to county	Amount to municipality	Amount to Tourism Dev. Auth./Other	Total net collections	Amount to municipality	Amount to county	Amount to other municipality	Amount to Tourism Dev. Auth./Other
		\$	\$	\$	\$	\$	\$	\$	\$	\$
Union	---					331,659.00	9,950.00			321,709.00
Monroe	5%									
Vance	6%	331,342.19			331,342.19					
Wake	6%	15,377,392.00	1,482,211.00	6,483,756.00	7,411,425.00					
Washington	6%	113,313.67			113,313.67					
Watauga	6% c	887,140.00	18,871.00		868,269.00					
Beech Mountain*	6%					185,015.00				185,015.00
Blowing Rock*	6%					736,163.00	17,190.00			718,973.00
Boone	6%					984,929.00	325,027.00			659,902.00
Seven Devils*	6%					71,948.14	2,008.41			69,939.73
Wayne	---									
Goldsboro	5%					656,983.00	656,983.00			
Wilkes	---									
Elkin*		See Surry County								
Wilkesboro	3%					116,069.57	3,482.09			112,587.48
Wilson	---									
Kenly		See Johnston County								
Yadkin	6% c	34,365.00			34,365.00					
Jonesville	6%					247,008.00	7,410.00			239,598.00
Yadkinville	6%					14,330.81				14,330.81
Yancey	3%	41,222.86			41,222.86					
TOTAL		135,560,221.57	32,815,242.79	28,876,770.42	73,868,208.36	30,014,508.03	13,886,076.78	625,003.41	0.00	15,503,427.84



PARTNER MARKETING DOLLAR ALLOCATION



ACTIVITIES OF NC OVERNIGHT VISITORS



WHO WE ARE TALKING TO

Mom, Wife, Daughter, Sister, Friend, Co-worker

- Females 35-54
- HHI \$75K+
- Wears many hats and frames her life in context of loved ones and friends



TOP TEN STATES OF ORIGIN



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Discover
PLACES TO STAY
↓

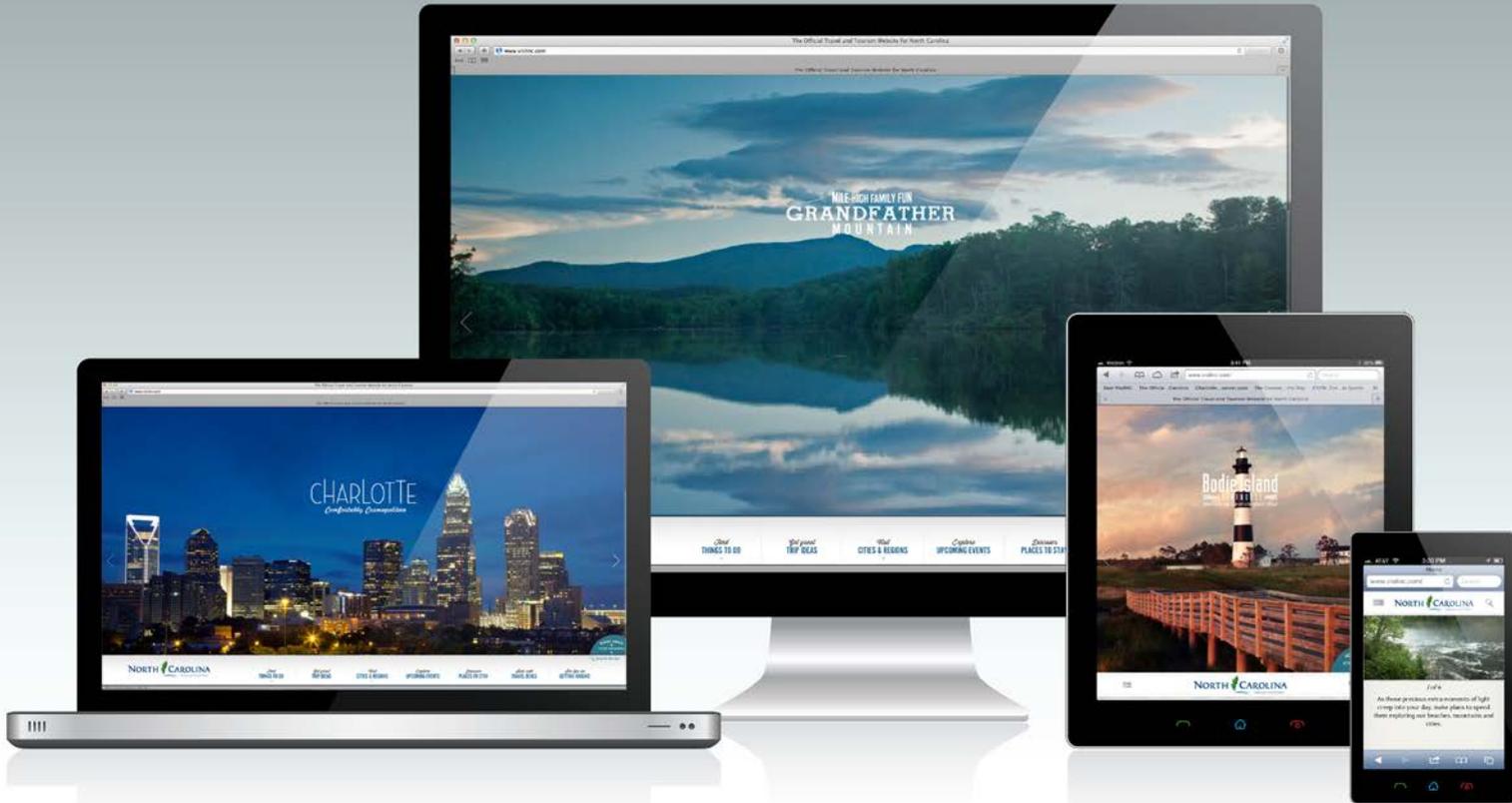
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TRAVEL DEALS
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See tips on
GETTING AROUND
↓

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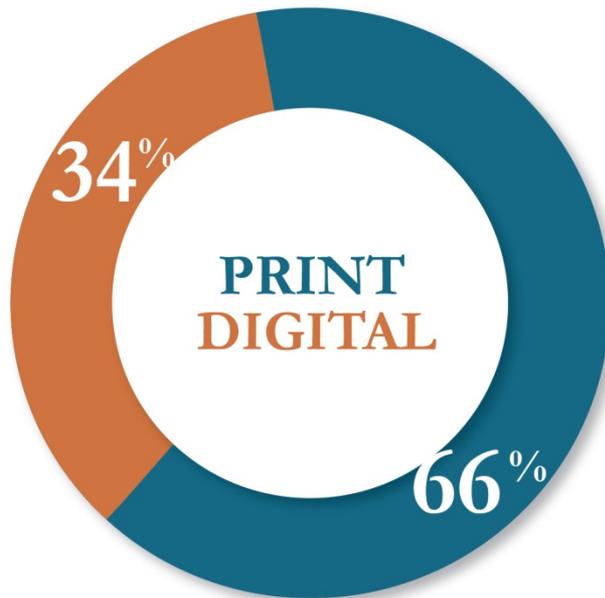


NORTH  CAROLINA™

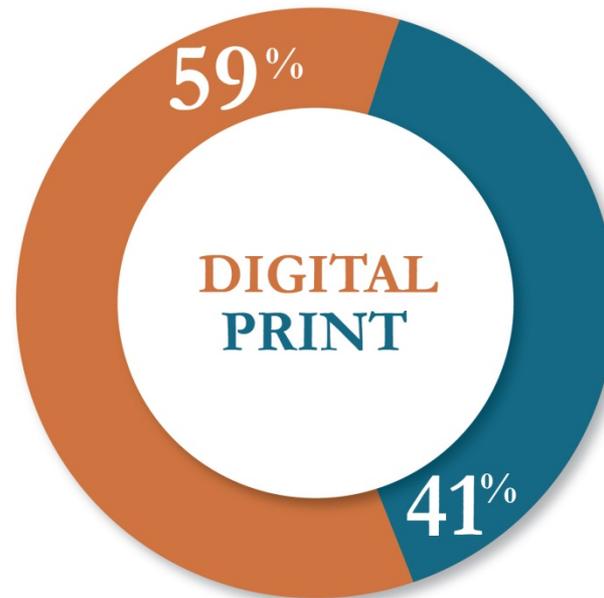
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MEDIA STRATEGY

{2011-2012}



{2012-2013}



BRAND ADVERTISING



only light *this captivating*
could attract such an elusive bear.

He comes out of hibernation twice a year, when the sun sets in the southern Blue Ridge. Created by small peaks that cast shadows on the slopes below, this bear bathes in the mesmerizing light of fall and spring. While his visits are short-lived, the brilliant views and crisp mountain air here kin back year after year. Chances are, they'll have the same effect on you.

NORTH CAROLINA
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even those who race *with wild abandon*
couldn't help but settle here.

More than four hundred years ago, ships ran aground along our coast. And while much was lost, some of the treasures were able to swim ashore. Long ago descendants of Spanish conquistadors here basked in the sun wherever they pleased. But like so many others who sailed our beaches - they remain. Captivated by the unforgettable sunsets, breathtaking breezes and swaying sea oats.

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some artists travel the world *for inspiration*
others don't need to.

Fixed to this place like strings to a guitar, our music is as loud as its fans. It stays near the people and the venues that helped bring it to life: jazz, country, rock, folk, bluegrass, newgrass and more - all live here. They were born in artists who call this state home. And the same places that inspired greats like John Coltrane, Nina Simone, James Taylor and The Avett Brothers - may also inspire you.

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THE MASS(IVE) MEDIA

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1999

2000s

2012

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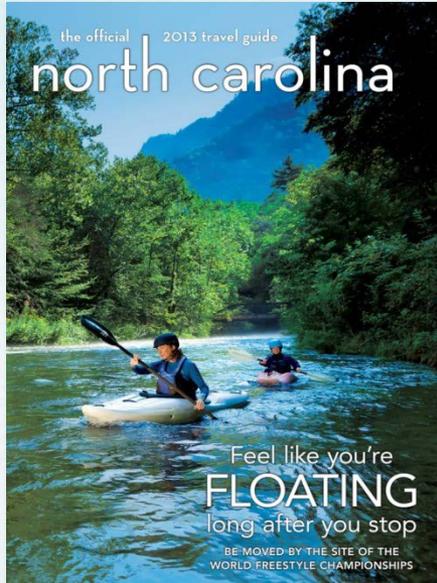
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Display
Website
Search
Online Display
Paid Search
Landing Pages
Microsites
Online Video
Webinars
Blogs
RSS
Podcasts
Wikis
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Radio
Print
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PARTNERSHIPS LEVERAGE RESOURCES



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Here, adventure begins. The epic hiking and fishing trails of Ashep and DuPont State Park are just a short drive away. Discover a new world in our cutting-edge galleries. The pace of life in Cashiers is peaceful and sophisticated. The golf courses are world-class. Enjoy family fishing and an array of dining options. Visit us today. Cashiers is the heart of the mountains.

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800.316.ROCK

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Ideally located at 3,500 feet, Cashiers is surrounded by the scenic Blue Ridge Mountains, alluring waterfalls, breathtaking scenery and appealing village shops. The pace of life in Cashiers is gentle and casually sophisticated. The golf courses enticing. Enjoy lovely lodging and an array of dining venues. Visit soon. Cashiers is beautiful.

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Escape to the tucked-away beaches of Currituck's Outer Banks. Named one of "America's Most Secluded Beaches" by *US News & World Reports*, we're home to the legendary Corolla Wild Horses, pristine four-wheel-drive beaches, world-class waterports and golf, authentic barrier island shopping and dining, and award-winning wines. Request your free visitors guide today!

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THE OUTER BANKS

OBX Marks the Spot for your fall adventure. Climb a lighthouse, take to the sky in a hang glider, try your hand at surf fishing – or go offshore. Play along 100 miles of barrier island beaches, with areas perfect for kayaking and kiteboarding, or explore the Cape Hatteras National Seashore. For more information, visit our website or call the number below.

OuterBanks.org
877.629.4386



GREENSBORO

From Grammy winners, art masterpieces and award-winning theatre to eclectic community events, the United Arts Council of Greater Greensboro hosts the city's annual *IF DAYS Arts & Culture Festival* each fall. *IF DAYS* takes shape with independently produced arts and cultural events across the city from September 20 through October 6.

VisitGreensboroNC.com
800.344.2282



HIGH HAMPTON INN

High Hampton is an historic inn and mountain resort on 1400 beautiful acres at 3600 ft. in Cashiers. Enjoy scenic golf, tennis, fly-fishing, world-class spa, hiking trails, 35-acre private lake, golf schools, wellness retreats, gracious hospitality and excellent cuisine. An ideal destination for families and friends. Stay at the Inn, a cottage, or a mountain rental home. For reservations or information about special packages, please call or go online.

HighHamptonInn.com
800.648.4523



JACKSON COUNTY

Nestled in the Blue Ridge, Balsam and Smoky mountains, Jackson County is a mountain wonderland. Enjoy fine resorts, delightful historic inns and friendly B&Bs. Explore the arts and craft galleries in Dillsboro and Sylva. Browse for antiques in Cashiers. Take in a round of golf. Try fly-fishing, rafting and the hiking trails. Listen to waterfalls. Discover the mountain wonderland.

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Nestled in NCS foothills, with abundant water sources, Rockingham County is the perfect place to experience nature's playground. Here, you can float on our rivers, hit the lakes, visit a hunting plantation, go horseback riding, sample local wine, play in a park or simply soak up the sun. So come, unplug and play in Rockingham County!

NCNorthstar.com
800.316.ROCK



SANDERLING RESORT

Sanderling Resort emerges from a multimillion dollar refresh, beckoning families and couples back to its picturesque shores on the Outer Banks of Duck. Travelers will discover two new pools with inviting fire pits, a tranquil spa offering indigenous healing treatments, miles of uninterrupted beaches and three full-service restaurants. *Buy three nights, get one free. Mention Garden.*

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enjoy all our state has to offer.

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LEVERAGING RESOURCES THROUGH PARTNERSHIPS

Media Spending

Division Media Budget: \$3,380,000

Partner investment: \$2,100,000

Final Budget: \$5,480,000

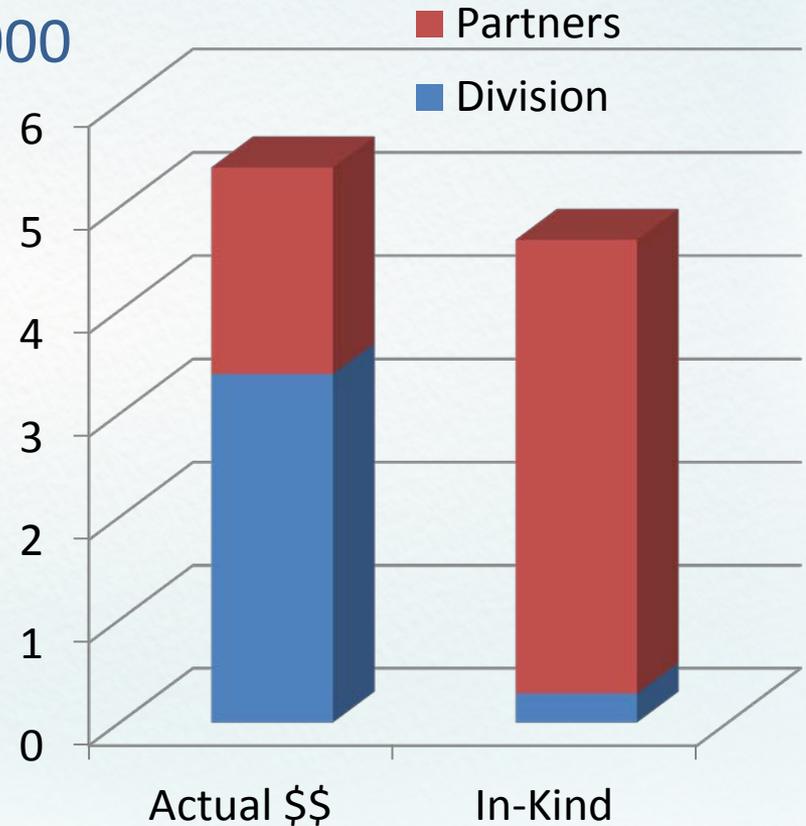
In Kind Media Partners

Division: \$280,000

Media Partners: \$3,391,000

Total Value:

\$9,126,000



INCREASING COMPETITION

CBS Miami Buy Tickets Your Home More FOLLOW US LOGI

Politics

Gov. Scott Seeks Record \$100M To Promote Florida Tourism

January 10, 2014 4:06 PM

16 5 9 View Comments



(Photo by Joe Raedle/Getty Images)

Related Tags: [Florida](#), [Gov. Rick Scott](#), [Politics](#), [Tourism](#), [Tourism Funding](#), [Visit Florida](#)

TALLAHASSEE (CBSMiami) — Gov. Rick Scott will seek \$100 million to help bring 100 million visitors a year to the Sunshine State. Sponsored Links Advertiser Here

Scott announced Friday that he intends to ask the Legislature for the record amount of funding for Visit Florida, the state's tourism-promotion arm, in the 2014 budget.

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TN steps up effort to attract more visitors

New report, millions more in marketing to get word out on all state has to

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SC tourism agency plans to market a 'barbecue trail'

BY ADAM BEAM
abeam@thestate.com August 4, 2013

LITTLE MOUNTAIN, SC — Brice Cannon sells 400 an old hot. His kitchen keeps a pile coats he in gallon fuel pot. On Th the grill an watching

Cannon's BBQ is one of dozens of family-owned barbecue restaurants scattered across South Carolina, many only open a few days a week and known primarily to locals and barbecue aficionados.

patio • pool • porch
furnishings you can afford

In the 2013-14 budget year, which started July 1, lawmakers approved a \$9 million increase for the state's tourism agency, for the second consecutive year one of the largest increases given any state agency.

49.5%

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NEWSLINK

In this issue:

- Division's Summer kickoff
- BrandUSA UK megafam comes to N.C.
- Surveys, Industry, Marketing & Travel Trends
...and more

Division's kickoff to summer highlights outdoor adventure

With Memorial Day weekend kicking off the summer travel season, the Division launched a celebration of the state's endless outdoor allure at a riverside event in Eden Tuesday (yesterday).

"We want travelers to explore the trails, waterways and other attractions that make North Carolina a premier destination for outdoor

NORTH CAROLINA

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PARTNER EXTRANET

The screenshot shows the 'Partner Extranet' interface. At the top, there are navigation tabs: Home, Content, Approval, Account, and Messages. The email address 'wtuttell@nccommerce.com' is visible in the top right. Below the navigation is a search bar with a plus icon and the word 'Search'. On the left is a sidebar with a list of categories: Advisories, Attractions, Cities, Dining, Events, Facilities, Files, Golf, Groups, Lodgings, Mediakits, News, Services, Stories, Travel Entities, Trip Ideas, and Visitor Information. The main content area is titled 'Attractions' and contains a table with columns: Status, Id, Title, Active, Live, Expire, and Modified. The table lists several attractions, including WoodMill Winery, Cedar Lake Tree Farm, Dillsboro Chocolate Factory, National Golf Club, Mid Pines Inn & Golf Club, Little River Golf & Resort, Country Club of Whispering Pines, Turnage Theater, St. Thomas Episcopal Church, Motorco Music Hall, Todd General Store, and New River. Each row includes icons for status and search, and a green checkmark in the 'Live' column. A 'View this video' link is present below the table. On the right side of the screenshot, there is a 'Extranet Webinars' section with two video thumbnails. The first is titled 'Updating your information and communication frequency' and the second is 'General overview'. Both thumbnails feature the 'VisitNC.com Extranet' logo.

Status	Id	Title	Active	Live	Expire	Modified
	9163	WoodMill Winery			Dec 2, 2013	Jan 1, 3000
	8918	Cedar Lake Tree Farm			Dec 2, 2013	Jan 1, 3000
	7340	Dillsboro Chocolate Factory			Nov 26, 2013	Jan 1, 3000
	9374	National Golf Club			Nov 25, 2013	Jan 1, 3000
	8656	Mid Pines Inn & Golf Club			Nov 25, 2013	Jan 1, 3000
	32026	Little River Golf & Resort			Nov 25, 2013	Jan 1, 3000
	30183	Country Club of Whispering Pines			Nov 25, 2013	Jan 1, 3000
	44599	Turnage Theater			Nov 25, 2013	Jan 1, 3000
	33486	St. Thomas Episcopal Church				
	8013	Motorco Music Hall			Nov 25, 2013	Jan 1, 3000
	30034	Todd General Store			Nov 24, 2013	Jan 1, 3000
	9609	New River			Nov 24, 2013	Jan 1, 3000

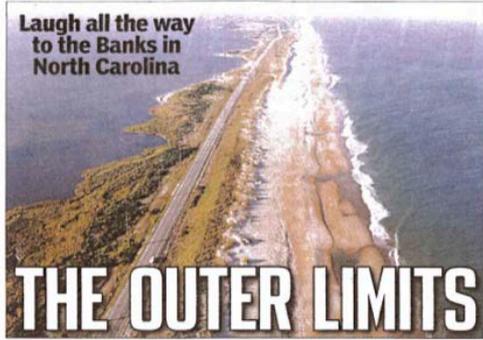
nccommerce.com/tourism (VisitNC partner database contacts)

Contact: Kathy Prickett

kprickett@nccommerce.com or 919-733-8302



Laugh all the way to the Banks in North Carolina



THE OUTER LIMITS

By JENNIFER CEASER

THE Outer Banks, a thin strip of barrier islands off the North Carolina coast, is one of those rare places where you can spend the morning on the beach and the afternoon on the sound without having to walk more than a few hundred yards. Which means, if you're feeling terribly lazy you could sit in one spot and catch both the sunrise and the sunset. But with so much going on in OBX (in local parlance), it'd be a shame to hang out on a deck chair all day. Here are some must-dos in three of the most popular spots: Kitty Hawk



Outer Banks houses during sunset, Kitty Hawk, N.C.

the sea is links (top).

GET THE I

GOOD MORNING AMERICA



PR WINS

go. On the fancier end, **Kimball's Kitchen** (sunderingresort.com), in Duck, offers dreamy sunset views over the Currituck Sound.

ETB CREDIBLE. COMPELLING. COMPLETE.

THE ATLANTA JOURNAL-CONSTITUTION SUNDAY, NOV. 24, 2013

TRAVEL

HOLIDAYS

Heaven and nature sing

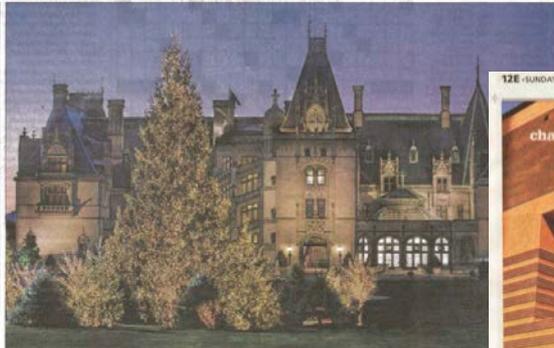
Visit to Biltmore Estate is enchanting.

Decorations embody spirit of Christmas at historic chateau.

By Tracey Tio

FOR THE A.S.C.

ASHEVILLE, N.C. — On Christmas Eve 1895, George W. Vanderbilt, heir to the vast Vanderbilt fortune, hosted a grand holiday party at his new, 250-room French Renaissance chateau. It sat on 125,000 acres of exquisitely beautiful land in western North Carolina's picturesque Blue Ridge Mountains. The upper echelon of New York society arrived in Asheville by private train with an entourage of personal servants, copious trunks and an intense curiosity about the baronial Biltmore House that had taken hundreds of laborers more than five years to construct. In the cavernous Banquet Hall, bejeweled ladies and dapper gentlemen admired the 40-foot-tall Christmas tree — awe-inspiring even to those accustomed to having the biggest and best of everything. The Vanderbilt family crest prominently displayed above a trio of Gothic fireplaces imparted the romance of a medieval castle. — www.visitnc.com



The Biltmore House exterior is featured during Candlelight Christmas Evenings. www.visitnc.com

IF YOU GO
Biltmore Estate
1 Lodge St., Asheville, 1-800-431-3512, www.biltmore.com.

heaven and it in the Chlo on the trees, I said it's also ti interest this.

The New York Times

12E - SUNDAY, DECEMBER 22, 2013 travel THE TENNESSEAN



The Federal sculpture stands in front of the Bechtler Museum of Modern Art in Charlotte, N.C. www.visitnc.com

City paints new picture

Arts, financial district boom in Charlotte

By Tracey Tio

CHARLOTTE, N.C. — Let's face it. Charlotte's art scene is booming. We've all seen those murals on buildings or murals with 1000 feet tall figures. "I just don't get it," says one local resident. The McCall Center for Visual Art in downtown Charlotte, locals call it Uptown, identifies the creative process. If you want to know what the artist had in mind, check out a working session with George Washington, a painting that is like to be asked how, just ask. Progressive and forward thinking, North Carolina's largest city embodies the "New South," it's the pa-



Jason Watson at work at the McCall Center for Visual Art.

that more vibrant than at the McCall Center. Home to one of the top artists-in-residence programs in the country, the McCall Center has now struck with an "open door" policy three days a week. A stark contrast to the traditional program in rural areas that cluster artists away from the community, the urban McCall Center offers residents the chance to chat about current and future art projects. Take South Carolina artist-in-residence Jason Watson, for example. He's happy to discuss "Wonders of the World," a work in progress that's a nod to Spanish romantic painter Francisco Jose de Goya y Lacortina (1768-1828). Ideas include an opera, a



The bronze statue, one of four at Independence Square in Charlotte, represents the world's future where women's voices are heard.

IF YOU GO
Where to Stay The Dunhill hotel, 237 N. Tryon St., Charlotte, 1-800-954-6941, www.dunhill.com
Where to Eat The newest Moon Grill is adjacent to the Dunhill Hotel and serves breakfast, lunch and dinner. Ingredients are sourced from local farms within 100 miles of Charlotte, 238 N. Tryon St., Charlotte, 104-642-7814, www.bonobos.com
Where to walk McCall Center for Visual Art, 227 N. Tryon St., Charlotte, 104-332-3325, www.visitnc.com
Bechtler Museum of Modern Art, 420 S. Tryon St., Charlotte, 104-333-8208, www.bechtler.org
A Mint Museum collection, 500 S. Tryon St., Charlotte, 104-337-2000, www.mintmuseum.org
Harvey & Grant Center for African American Arts & Culture, 101 S. Spear St., Charlotte, 104-547-3700, www.gartcenter.org

NEW YORK POST

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The screenshot shows the North Carolina website's PR section. At the top, there is a navigation bar with the following items: "NORTH CAROLINA beauty amplified" (with a leaf logo), "WHAT'S NEW", "MEDIA KITS", "IMAGES & VIDEO", and "CONTACT US". The main heading is "Travel Partner News". Below this, it says "Showing 1 through 10 of 1390". There are two news items listed:

- Anglers Get Ready for Fontana Marina Spring Classic Bass Tournament**
May. 21, 2014
Anglers are getting the tackle ready for the 2014 Fontana Marina Classic Bass Tournament scheduled for June 7th & 8th. With 238 miles of shoreline on Fontana Lake, this is a great opportunity.
more...
- African Sculpture Exhibition to Open at Daniel Stowe Botanical Garden**
May. 21, 2014
The work of Passmore Mupindiko, Patrick Sephani and dozens of other artists will be on display beginning June 27 at Daniel Stowe Botanical Garden in an exhibition titled "ZimSculpt".
more...

On the right side of the screenshot, there is a "More NEWS" section with a list of links: "Latest News", "Travel Partner News", "Fact Sheets", and "What Others Are Saying". Below the news items, there is a photograph showing a group of people at an event. A woman in a white dress and sash is standing next to a table covered with a red cloth that has the Cherokee Nation logo on it. Other people are gathered around the table, and a man in a light blue shirt is looking at something on the table.



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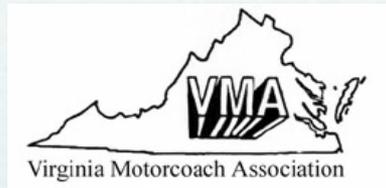
Charlotte Hog Jog - Charlotte

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<small>Aug. 09, 2011</small>	<small>Aug. 16, 2011</small>

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INTERNATIONAL MARKETING

The collage consists of three distinct images. On the left is a photograph of a group of five people (three men and two women) standing together at what appears to be a trade show or event. They are dressed in business-casual attire. Behind them is a backdrop featuring logos for Ford, SKODA, The Telegraph, and Mazda. In the center is a screenshot of the CANUSA TOURISTIK website. The website header includes the company logo and the tagline 'Ihr Spezialist für individuelles Reisen in Nordamerika!'. Navigation tabs for 'KANADA', 'USA', 'HAWAII', 'BAHAMAS', 'REISEARTEN', and 'SERVICE' are visible. A search bar is located in the top right corner. Below the navigation is a large banner image of a coastal path with a wooden railing, overlaid with a text box that reads 'North Carolina entdecken' and 'Von den Outer Banks bis zu den Smoky Mountains.' At the bottom of the website screenshot, there is a 'PREISKÜLLER' (Price Killer) button and a notification that says '677 Preisküller gefunden'. On the right is the logo for TOTAL VACATIONS.CA, featuring the word 'TOTAL' in a stylized blue font with a yellow wave graphic, and 'VACATIONS.CA' in a smaller blue font below it.

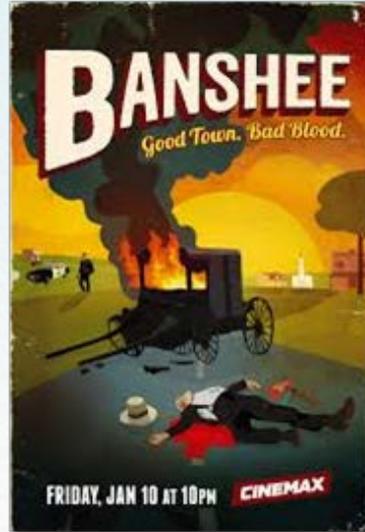
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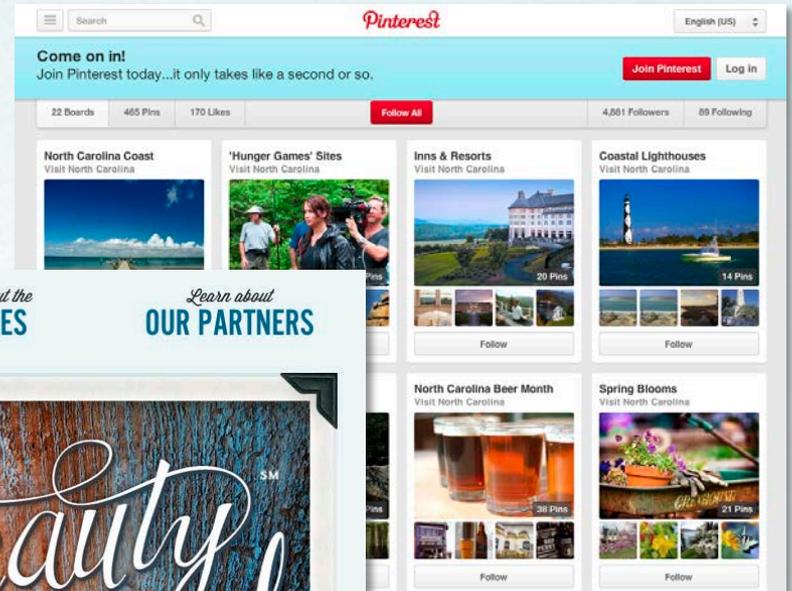
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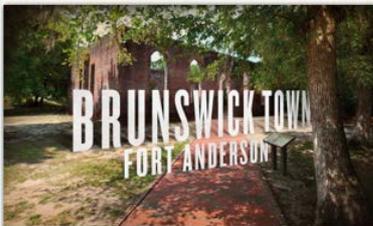
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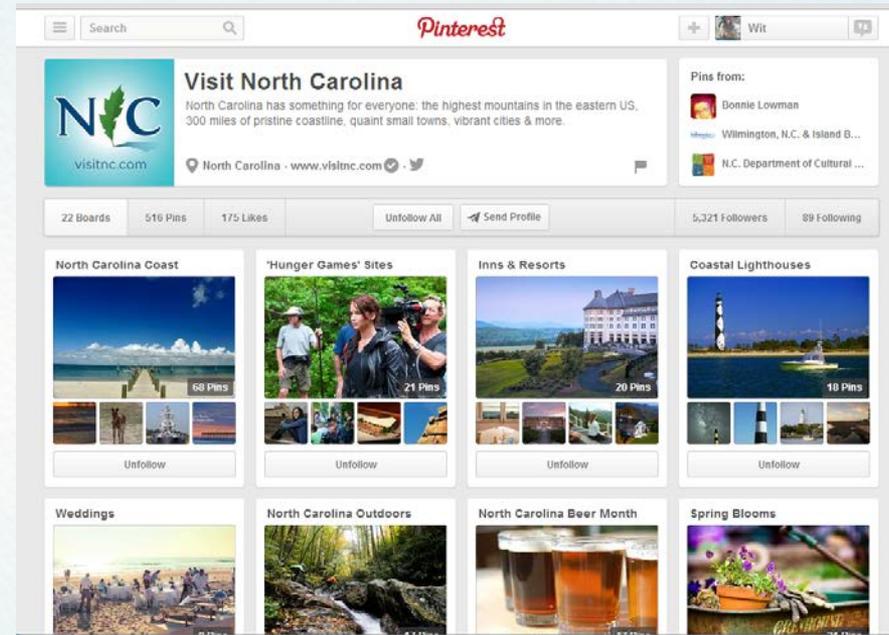
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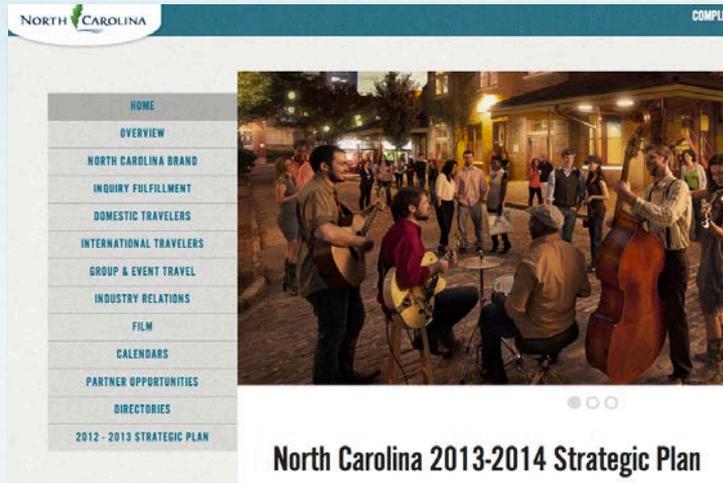
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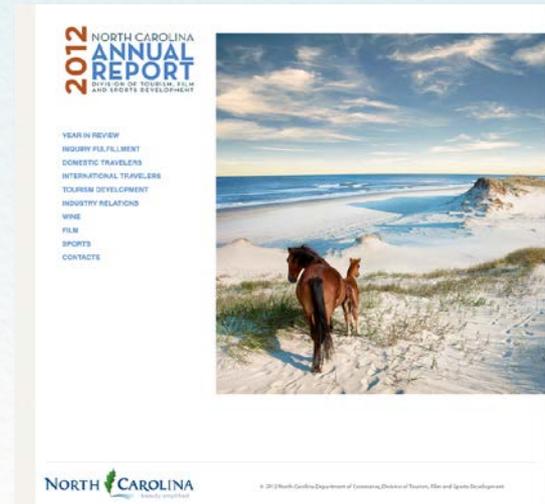
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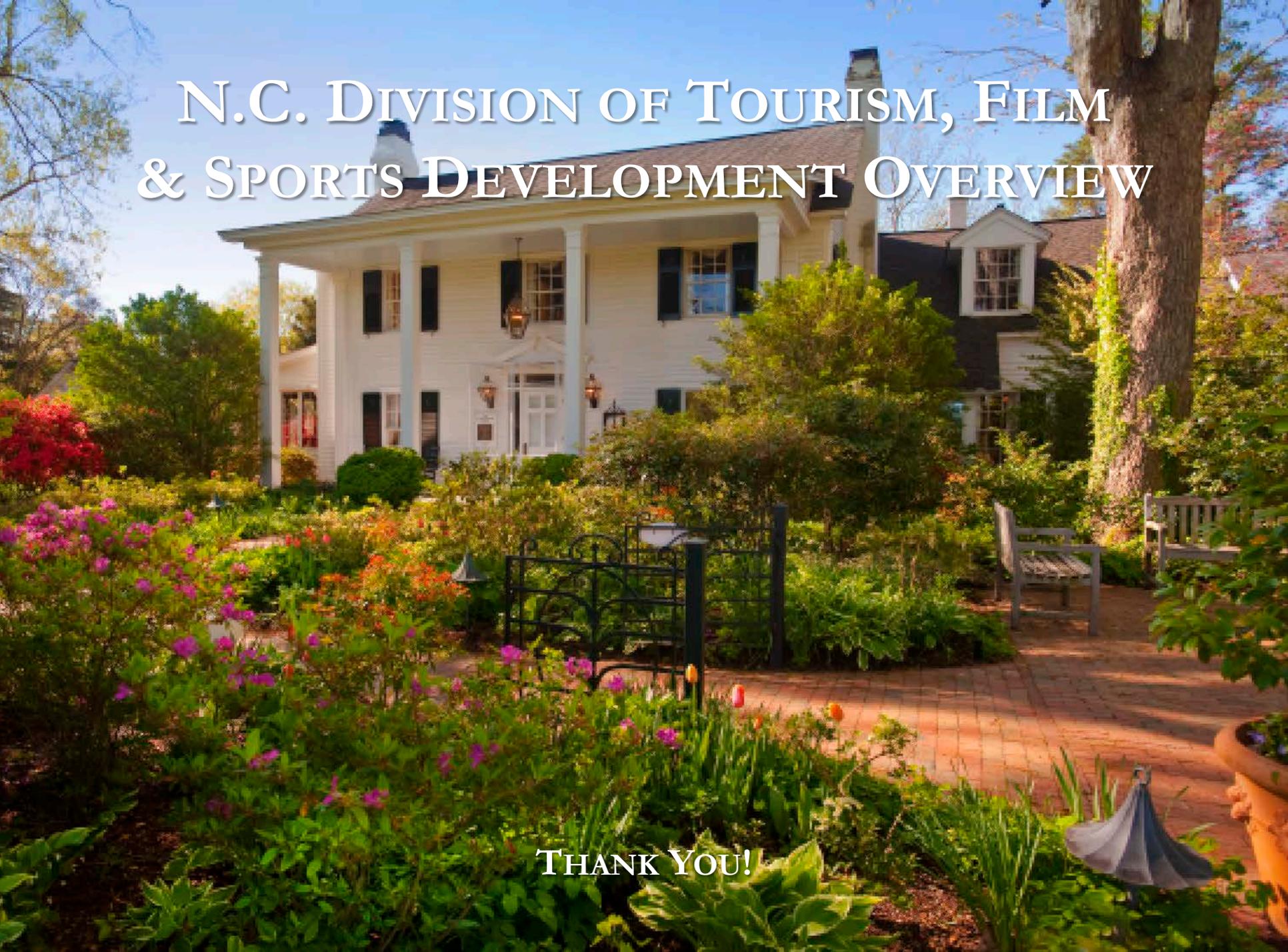
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