



VISIT NC UPDATE WILMINGTON AREA HOSPITALITY ASSOCIATION

October 15, 2025



What is an EDPNC?

Economic Development

**Business
Start-up**

**Business
Recruitment**

**Product
Export
Assistance**

**Tourism
Development**

**Business
Growth &
Retention**

The Economic Development Partnership of North Carolina improves the economic well-being and quality of life for all North Carolinians. We do this by collaborating with state, regional, local, and private-sector partners in new business recruitment, existing employer support, international trade and export assistance, small business start-up counseling, and tourism promotion.



Visit North Carolina

Our Mission:

To unify and lead the state in positioning North Carolina as a preferred destination for travelers, sports events and film production and in maximizing economic vitality statewide.



An aerial photograph of a dark-colored car driving on a two-lane road that runs vertically through a dense forest. The road has a double yellow line down the center and white lines on the edges. The trees are mostly green with some yellowing, suggesting an autumn setting. The overall lighting is somewhat dim, giving the scene a moody atmosphere.

WHO WE ARE AND WHAT WE DO

NC



WHAT WE'RE STRIVING FOR

Business Objectives:

1. Drive out-of-state and international travel to NC.
2. Inspire travelers and residents alike to discover new places and spend more dollars in state.
3. Become the premier & preferred destination on the East Coast for leisure travel.
4. Protect the natural beauty of our state to ensure it remains a top destination for outdoor travelers.
5. Elevate and amplify local DMO and partner messaging.
6. Become top choice retirement destination.

Communications Objectives:

1. Raise awareness.
2. Inform.
3. Stay relevant.
4. Extend an inclusive welcome.
5. **Inspire.**

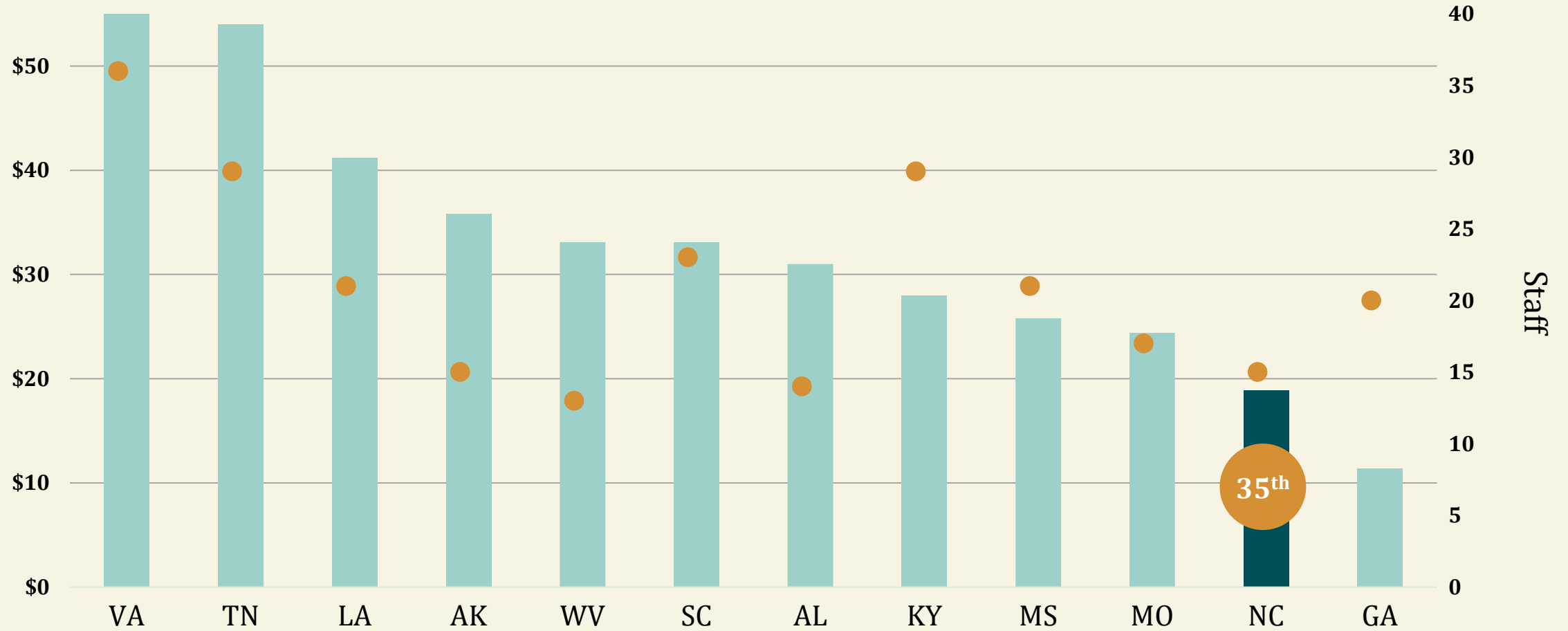


NUMBER ONE PREFERRED LEISURE DESTINATION IN THE EAST

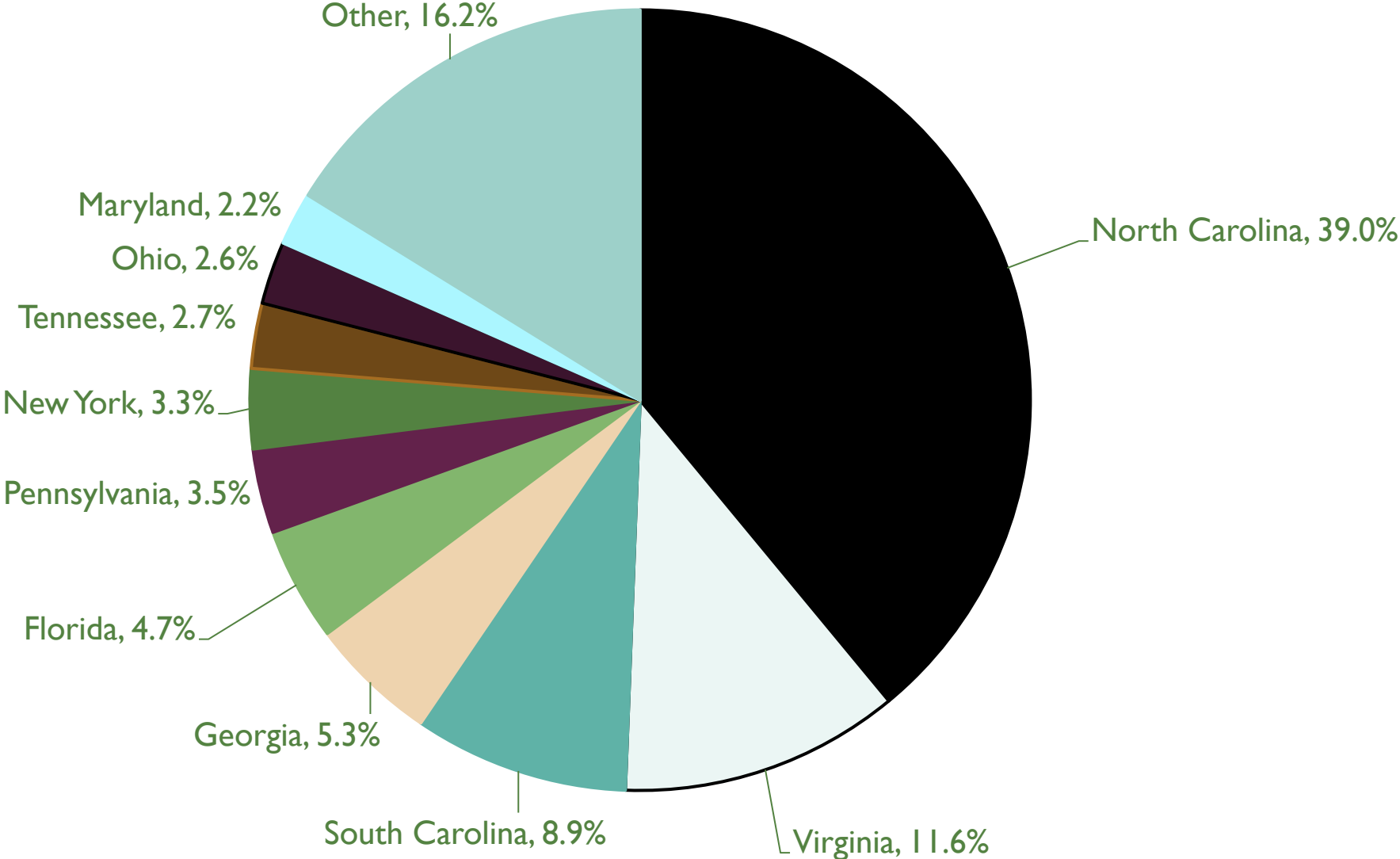
**Excluding Florida*



BUDGETS AND STAFF FOR SOUTHEAST COMPETITOR STATES

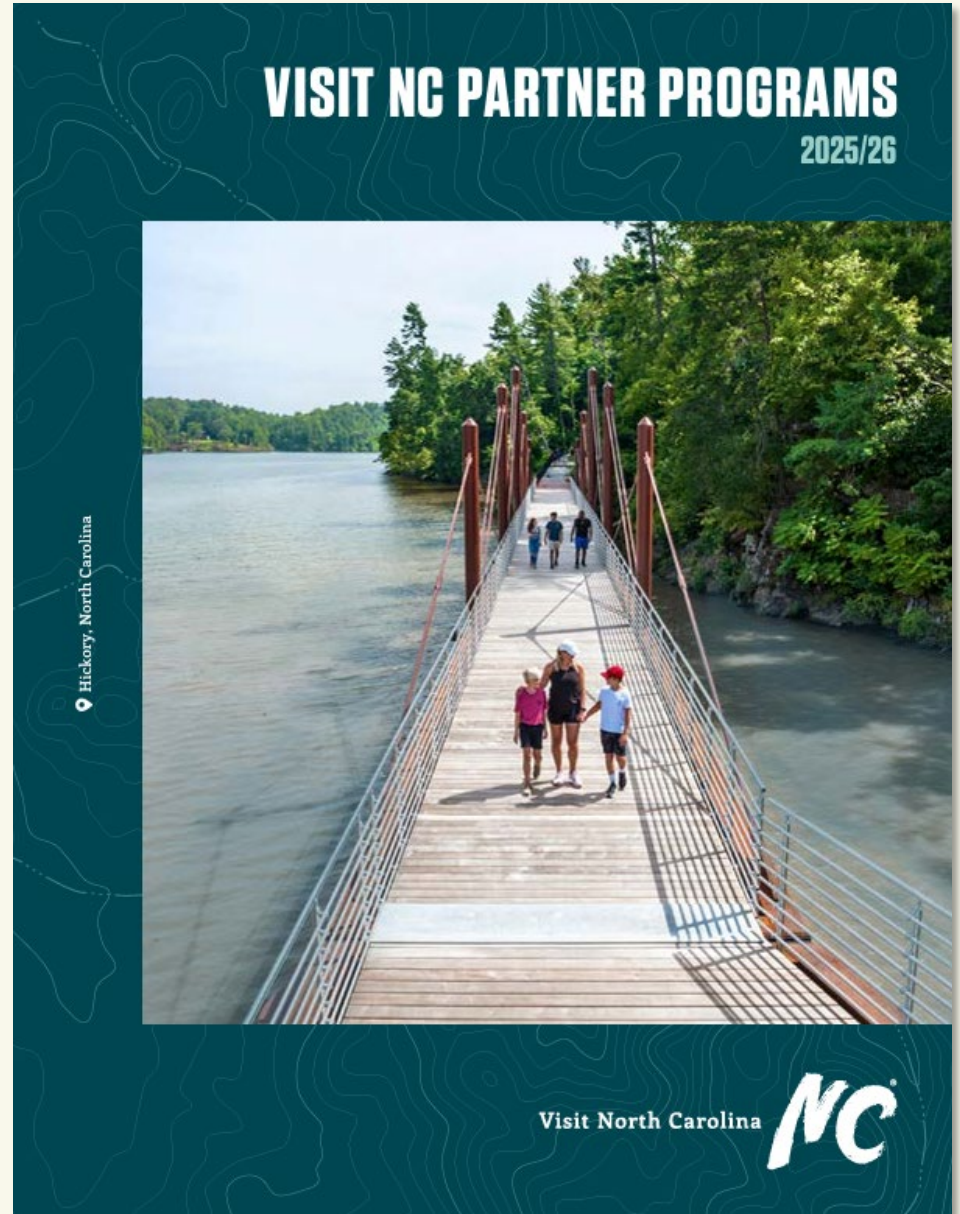


STATE OF ORIGIN OF NC OVERNIGHT VISITORS

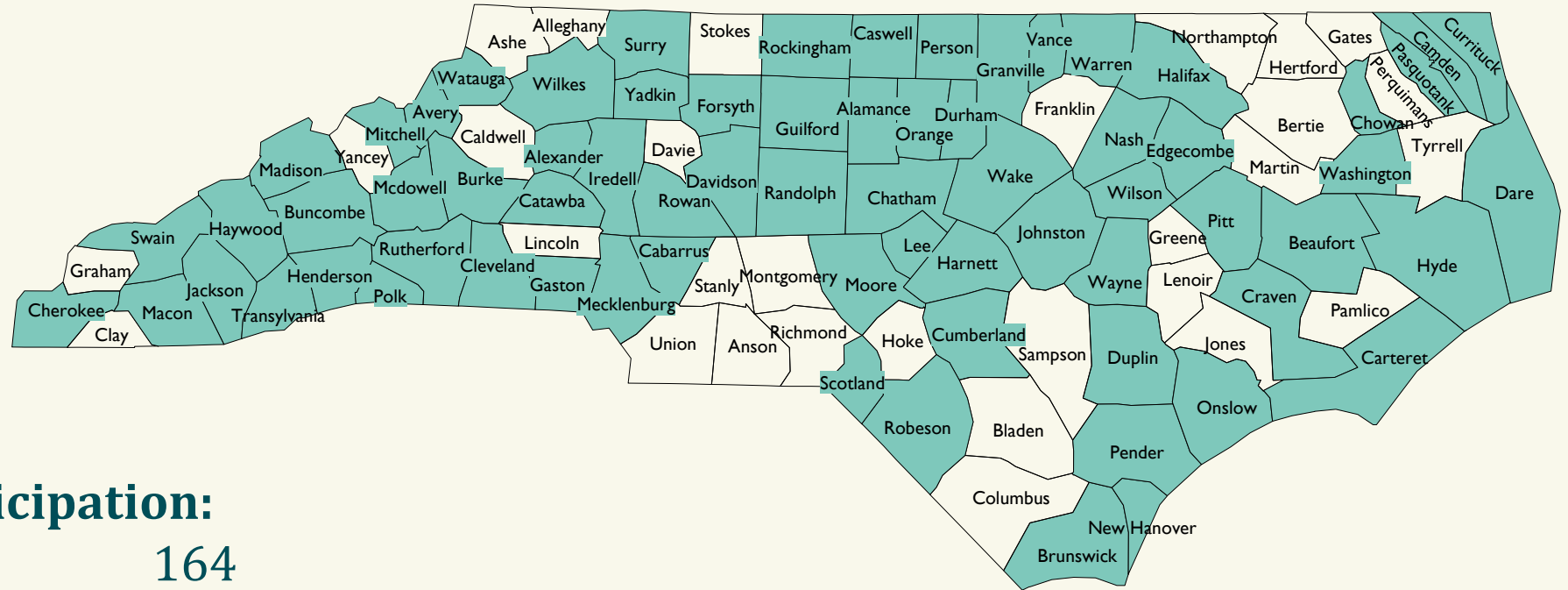


PARTNER CO-OP PROGRAMS

- 42 opportunities
- Up to 76% savings for individual programs
- Opportunities across all disciplines
- Additional discounts on select programs for
 - Outdoor NC Alliance Partners
 - Retire NC Certified Retirement Communities
- Partner interest since Visit NC 365
 - 38 partner contracts out for signatures
 - Includes 27 Tier 1 and Tier 2 partners
 - Represent \$656,490 in commitments
 - All regions represented



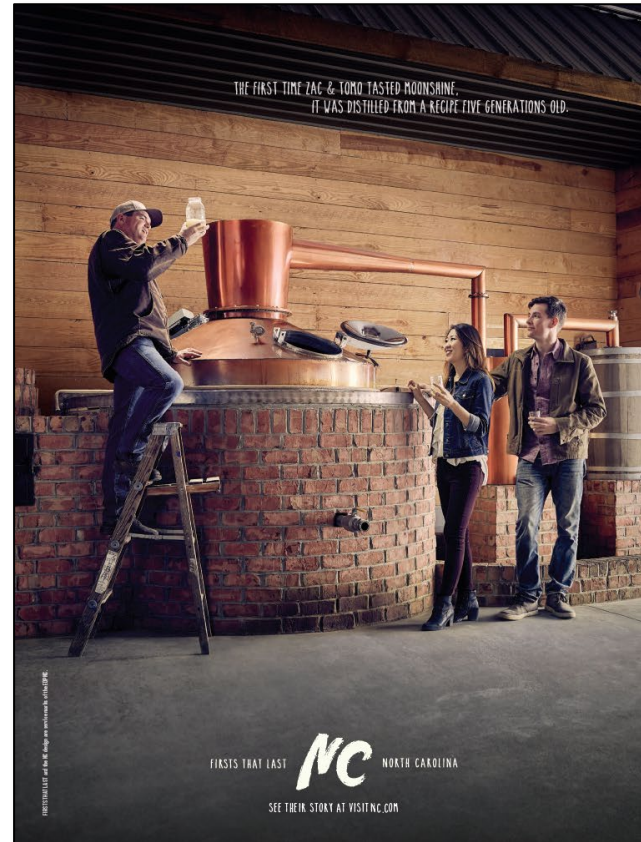
NEARLY ALL COUNTIES JOIN OUR CO-OP PROGRAMS



2024 Partner Participation:

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

CO-OPS EXPAND YOUR MESSAGE



A couple is walking away from the camera through a lush green field filled with sheep. The sun is low on the horizon, creating a warm, golden glow and long shadows across the landscape. In the background, there is a line of trees and a row of small, white-roofed structures, possibly a farm or a processing facility. The overall scene is peaceful and rural.

OTHER WAYS WE WORK

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





ADVERTISING



For Real, Visit

NC[®]





'FOR REAL' BRAND CAMPAIGN APRIL-JUNE 2025 PERFORMANCE

Web metrics:

- +201 million paid media impressions
- **Integrated Media** accounted for over **49%** of these impressions
- Of the **1.1MM total click-thrus** to site:
 - **Paid social** accounted for **49%** of clicks
 - **Paid search** accounted for **31%** of clicks

Audience insights:

- In terms of ad engagement, **Discoverers drove stronger ad engagement** (CTR) and ultimately generated more site traffic
- **Once on-site, Enrichers demonstrated deeper interest**, with higher engagement rates and longer time spent exploring content
- Audience scale and reach fluctuated by channel, emphasizing the **importance of a robust media mix** to meet each group where they're most active and engaged

ELSEWHERE, A COUPLE IS CELEBRATING THEIR ANNIVERSARY BY PUTTING IT OFF TO NEXT YEAR.

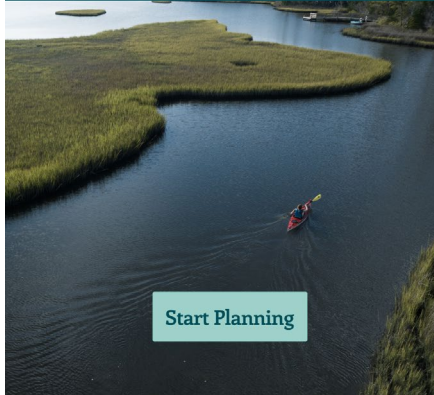
For Real, Visit **NC**



Start Planning

SOMEWHERE ELSE, PEOPLE ARE ONLY WATCHING A LIVE STREAM.


For Real, Visit **NC**



Start Planning

ELSEWHERE, A FAMILY IS ENJOYING A GENTLE OCEAN BREEZE FROM THEIR AIR FRESHENER.

For Real, Visit **NC**



Start Planning

SPONSORED CONTENT: TRAVELZOO

TRAVELZOO



North Carolina as we know it today has played host to many people over its remarkably rich past—from the Indigenous tribes of the Appalachian Mountains who preceded English settlers by millennia to the pirates who swashbuckled along the coast in the 17th and 18th centuries. To this day, history is never far below the surface. You just have to know where to look.

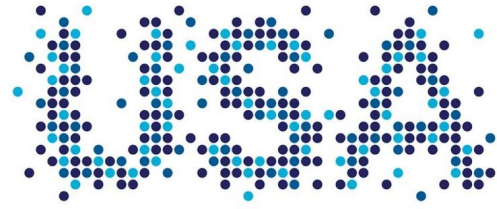
No matter where you go in the state's three regions—the Mountains, Piedmont and Coast—you'll have the chance to immerse yourself in another time. Whether you're exploring historic attractions and famous firsts or retro activities that you might not have experienced since your youth, you'll find one thing time and again: North Carolina holds on to its authentic self.

Read on to discover how [North Carolina](#) brings the past to the future.



INTERNATIONAL

INTERNATIONAL



VisitTheUSA.com

**TRAVEL
SOUTH
USA**



CO-OP AND MEDIA

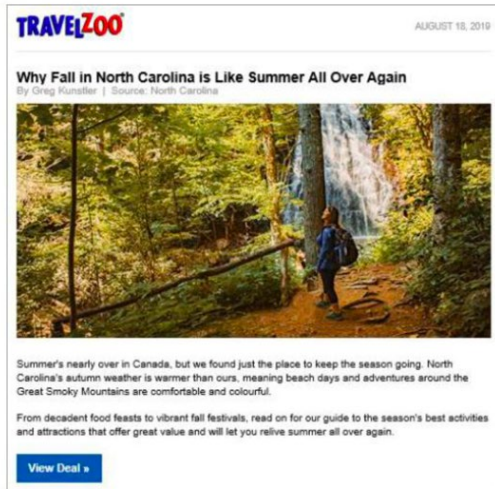


NCG
TOP 100s
MATCHPLAY

WIN A ONCE-IN-A-LIFETIME TRIP TO THE CAROLINAS, USA


- > Play four rounds of matchplay golf
- > Qualify for Regional Finals at **Ganton** or **Worplesdon**
- > Win a seven-night trip to the Carolinas, USA

STANDALONE EMAIL



TRAVELZOO AUGUST 18, 2019

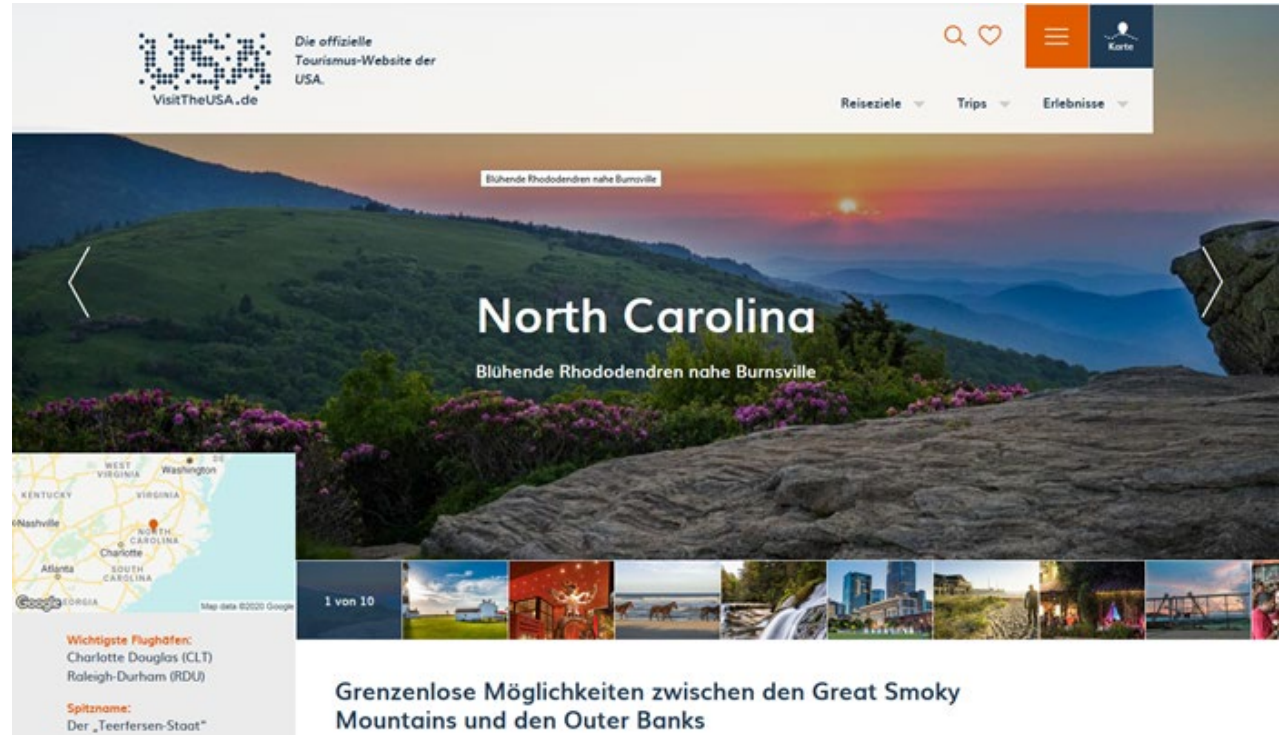
Why Fall in North Carolina is Like Summer All Over Again
By Greg Kunstler | Source: North Carolina



Summer's nearly over in Canada, but we found just the place to keep the season going. North Carolina's autumn weather is warmer than ours, meaning beach days and adventures around the Great Smoky Mountains are comfortable and colourful.

From decadent food feasts to vibrant fall festivals, read on for our guide to the season's best activities and attractions that offer great value and will let you relive summer all over again.

[View Deal](#)



USA Die offizielle Tourismus-Website der USA. VisitTheUSA.de

Reiseziele Trips Erlebnisse

Blühende Rhododendren nahe Burnsville

North Carolina

Blühende Rhododendren nahe Burnsville



Wichtigste Flughäfen:
Charlotte Douglas (CLT)
Raleigh-Durham (RDU)

Spitzname:
Der „Teerfelsen-Staat“

1 von 10

Grenzenlose Möglichkeiten zwischen den Great Smoky Mountains und den Outer Banks

MISSIONS & TRADESHOWS



PUBLIC RELATIONS

MAXIM



(COURTESY: RICHIE/DAVID ARNOLD PHOTOGRAPHY)

THE BEST LUXURY GETAWAYS IN NORTH CAROLINA'S SMOKY MOUNTAINS

From the off-the-beaten-path splendor of The Swag and the historic lakefront Greystone Inn to the vintage luxury heritage of High Hampton and beyond.

STINSON CARTER • JUL 1, 2025

This Small Town in North Carolina's Inner Banks Is the First in America to Be Named After George Washington—and No, It's Not Our Nation's Capital

The small town of Washington, North Carolina, has a James Beard-nominated restaurant, charming boutique inns, and lots of history.



People strolling along the waterfront in Downtown Washington. Credit: Visit NC

TOP 5 CAN'T MISS

- Washington, not to be confused with the nation's capital, is part of North Carolina's Inner Banks, was the first U.S. town named after George Washington.
- The area is rich in history, with nearby Bath (the state's first settlement), and museums like the Washington Waterfront Underground Railroad Museum.
- Creek State Park is a great spot to explore the local ecosystems—think cypress swamps and forest trails.
- Dining options range from upscale (The Hackney) to casual like Bill's Hot Dogs and The Mulberry House, offering comfort fare and seafood, respectively.
- Boutique accommodations such as The West Main and The Ell Hotel provide unique lodging experiences with personalized touches and Southern charm.

CASUAL

TURISMO

CAROLINA DO NORTE EM CLOSE-UP

Descubra um destino que brilha como coadjuvante em filmes e séries, mas tem carisma de protagonista fora das telas

CAROLINA BEHRA, A CRIADORA DO VLOGER "TRAVELING UNDERST" (COURTESY: VISIT NC)



Visit a Carolina do Norte, estado no sul dos Estados Unidos, é como entrar em um filme que você talvez já tenha visto, mas não se lembra exatamente onde. Essa sensação fica ainda mais forte ao chegar à região costeira apelidada de "Hollywood East" ou "NC Hollywood". Wilmington se tornou como um dos maiores polos de produção cinematográfica do país. Desde 1983, mais de 400 produções foram gravadas por lá, entre elas *Blue Velvet*, *Dances with Wolves*, *Blade Runner* e *O Inimigo da Minha Alameda*.

O início dessa história é cinematográfico por si só: há mais de 40 anos, o produtor filmático Dino De Laurentiis, responsável por filmes de diversos como *Predator*, *Falco e Roberto Benigni*, criou uma equipe em busca de locações para *Protektor ("Chama de Vingança"*, em português), adaptação do livro de Stephen King estrelado por uma atriz jovem atriz americana chamada Drew Barrymore. A busca levou a equipe até Orton Plantation, entre os vilarejos de

Wilmington e a cidade de Southport, que também serve como local de várias gravações. De Laurentiis resolveu ficar mesmo por ali e fundou um projeto estúdio, o DEC Studios, estúdio do que viria a ser um dos maiores centros de produção fora da Califórnia. O complexo passou por várias mãos até ser adquirido, em 2003, pelo Cineplex Studios, um dos maiores operadores do mundo. Hoje, o estúdio oferece um reembolso de 25% sobre despesas feitas



por produções locais, como forma de incentivo à indústria audiovisual. Em 2024, foram mais de 502 milhões de dólares em gastos diretos gerados por mais de 70 produções e o segundo maior volume desde 2015, quando o programa atual de subsídios foi lançado. "O sucesso deste ano destaca a evolução constante da indústria cinematográfica da Carolina do Norte e nossa reputação como destino que oferece talento, diversidade de locações e um programa robusto de incentivos", diz Guy Gaston, diretor do Escritório da Câmara Local "Incentivos cinematográficos com o crescimento econômico e com o fortalecimento das nossas comunidades".

UM CENÁRIO PROMETIDO

Wilmington está localizada entre o Oceano Atlântico e o Rio Cape Fear — um cenário perfeito para ser o sul ou norte, ou o mar e se pôr sobre as águas do rio. A arquitetura é charmosa, as ruas arborizadas, o ritmo tranquilo e uma luz natural que parece feita para cinema transformaram a cidade em um estúdio a céu aberto. Não é nem o mar nem o cinema, porém a produção em andamento. Uma das séries mais aclamadas filmadas ali foi *Dances with Wolves*, que estreou em 1994 e acompanhou, durante seis temporadas, quatro ad-

tores levantando-se e encontrando em suas turbulências da juventude. Ao todo, 128 episódios foram gravados em Wilmington e nos gramados da região. Muitas das locações usadas nos gramados, e também os lugares frequentados pelo elenco, ainda estão por lá: o restaurante Hell's Kitchen, casa dos personagens, escolas, lojas como a The Black Cat, marinas e outros pontos que aparecem na série.

No Rio, Wilmington viveu *Cape Fear*, cidade fictícia no litoral de Massachusetts. Mas, segundo Tamara Smead, guia local especializada em tours cinematográficos, a paisagem sempre certa caracterizou o cenário. "Quando você observar a orla do Rio Cape Fear, parece um palmeiras e na vegetação típica do sul. Eles pensavam ser cuidados com o que mantinham. E foram eles mesmo. Os episódios mostram como imagens do novo rio, depois tornaram-se parte vital de Massachusetts e, assim, nos comunicamos de que estamos em Cape Fear. Isso é o que chamamos de 'suspeição de desmemória'".

Outra série que deixou marcas foi *Over the Hill*, com seis temporadas gravadas entre 2011 e 2012. A história do dilema meio-irmãos, guiada por conflitos e reviravoltas, teve boa parte de suas 288 episódios rodados na orla de Wilmington. "Não são apenas a começar a filmar uma nova fase da série, mostrando como os personagens seguem com suas vidas. Eles ainda têm uma ligação forte com essa região. Estamos animados com o retorno das gravações, até porque eu já sempre fui", diz Smead, com tom de orgulho.

Uma das filmes mais famosos rodados na região, entre fevereiro e abril de 1996, foi *Blue Velvet* ("Veludo Azul", em português), escrito e dirigido por David Lynch. Local das gravações, o bar Barbary Coast, que funciona até hoje no centro da cidade, foi escolhido pelo ator Dennis Hopper depois que ele estava ali para tomar sua cerveja preferida: a Polar Blue Velvet.

E as câmeras continuam girando. Em 2025, há programação em Blue Velvet, um novo conceito de produção que ganhou ainda mais fôlego em 2024 com a chegada de uma nova geração, *Wilmington* segue forte com filmes e bastidores das histórias que ganham vida nos telas e também das que acontecem fora delas, a

Se jornalista viajou a convite da Travel South USA maio de 2025

MEL & WILLIAM, no Wilmington, local do filme "Blue Velvet"

EXTRAS
A paisagem costeira e o rio Cape Fear são os pontos fortes da região. O rio também é um ponto forte da região.

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UPCOMING MEETINGS AND EVENTS

- Atlanta Media Mission (Oct 27-29)
- NYC Media Mission (Nov 3 - 5)
- Michelin Announcement, SC (Nov 3)
- Michelin Masterclass FAM (Nov 5-9)





OUTDOOR

NCSM

NC

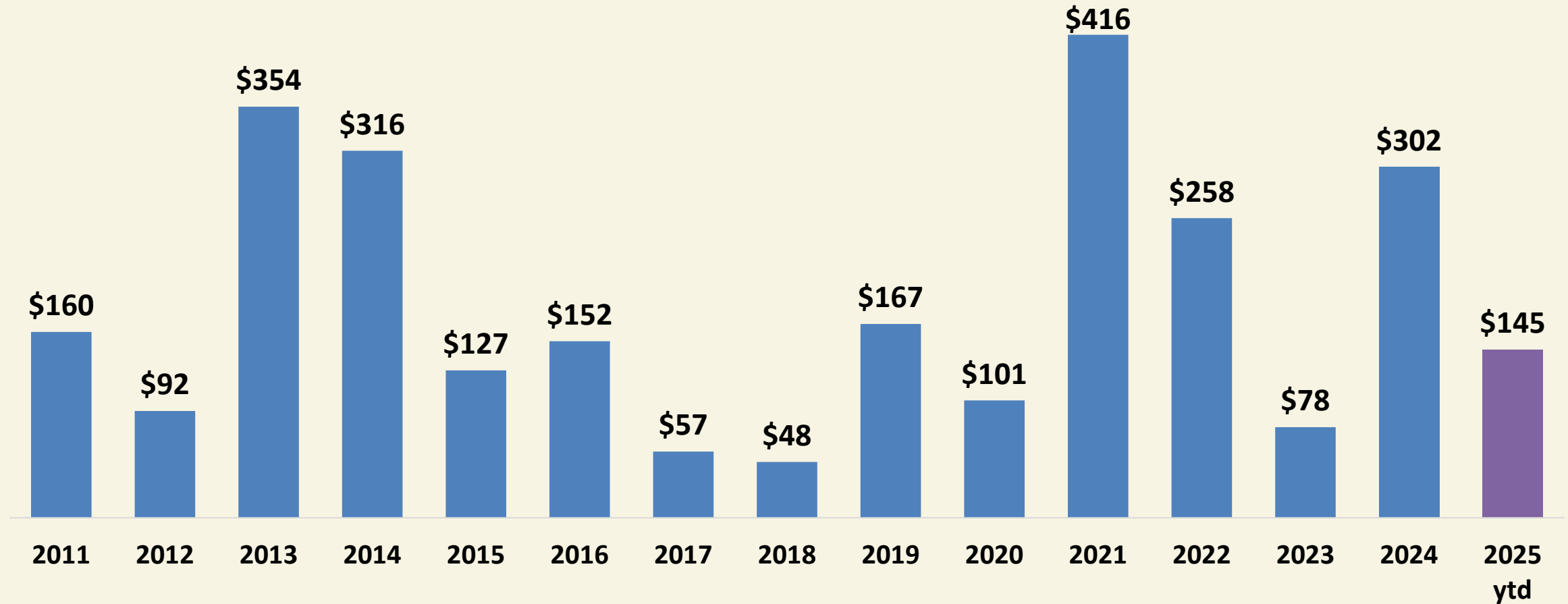
THREE PILLARS OF OUTDOOR NC

Outdoor NC Principles & The Outdoor NC Alliance	Accessible Outdoors Program	Trail Town Program
<ul style="list-style-type: none">• Educates visitors on seven customized Outdoor NC Leave No Trace Principles.• Provides a wide variety of resources to help partners communicate this message.	<ul style="list-style-type: none">• Promotes access for people with all abilities.	<ul style="list-style-type: none">• Celebrates North Carolina Trail Towns and destination stewardship.

filmc

NC

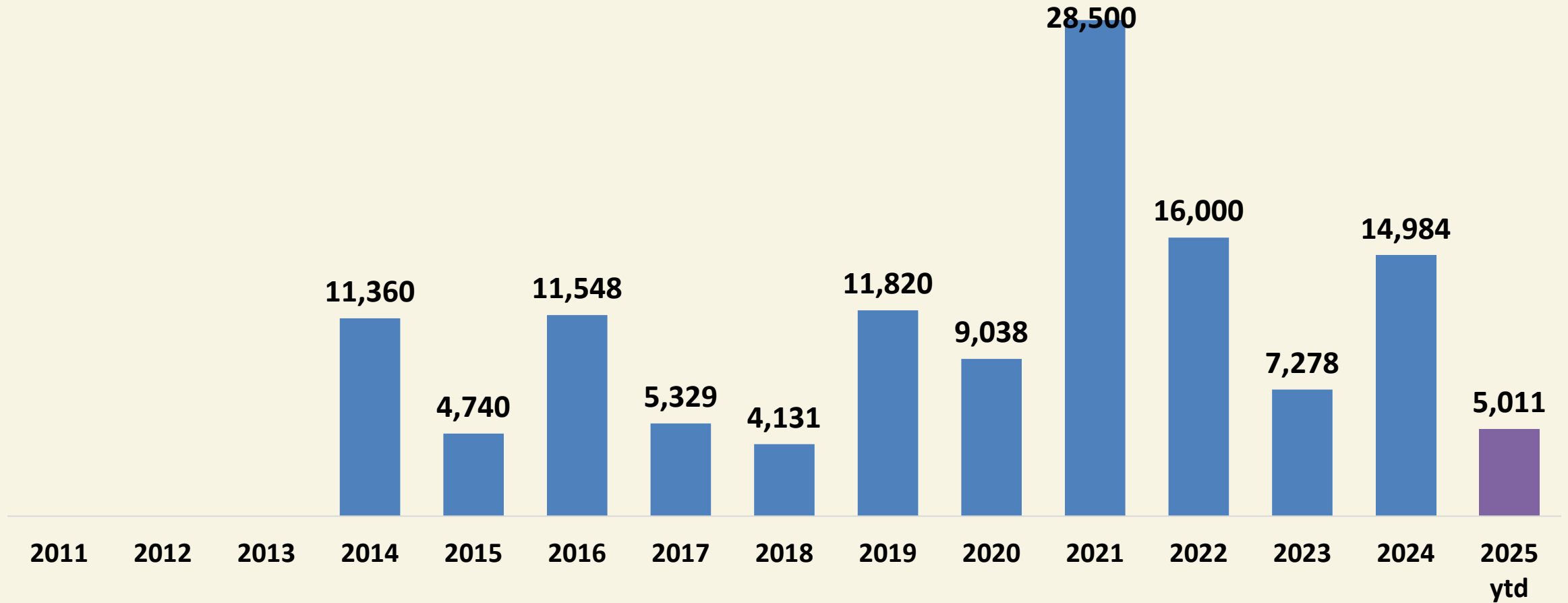
DIRECT IN-STATE SPEND BY PRODUCTION (IN MILLIONS)



*As of October 7, 2025



JOB OPPORTUNITIES



**As of October 7, 2025*



CURRENTLY IN PRODUCTION OR RECENTLY WRAPPED

**Top Chef –
Season 23 ***

The Bard *

**May and the
Woodsman ***

The Double *

RJ Decker Pilot *

**Beast Games –
Season 2 ***

Pretty Ugly

Bad Counselors *

A Good Fight

Drivers Ed *

**Blue Ridge –
Season 2 ***

**Long Drive to
Yadkin**



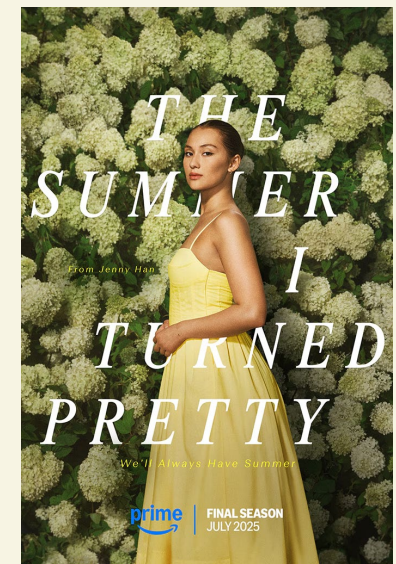
2025 RELEASES



Now Available
On Demand



Now Available
Netflix



Now Available
Prime Video



Now Available
Netflix



October 3
In Theaters

Likely this year, dates TBA



A wide-angle photograph of a beach at sunset. The sky is a gradient of blue and orange, with the sun low on the horizon. In the foreground, two surfers are wading in the shallow water, each carrying a surfboard. Their shadows are cast long on the sand. In the background, several other people are walking along the beach. The overall mood is serene and active.

HOW DO WE MEASURE RESULTS?

NC

RETURN ON YOUR INVESTMENT

Tourism marketing investment generated \$13 in tax revenue for state and local government for every \$1 invested.

Advertising Impacts	2021	2022	2023	2024
Ad-Influenced Visitor Spending	\$1.35B	\$1.06B	\$1.85B	\$815.4M
ROI	\$354	\$217	\$310	\$144
State and Local Taxes Generated	\$122.8M	\$96.0M	\$167.9M	\$71.7M
Tax Return on Investment	\$31	\$20	\$28	\$13

2024 FINAL TOURISM KPI RESULTS

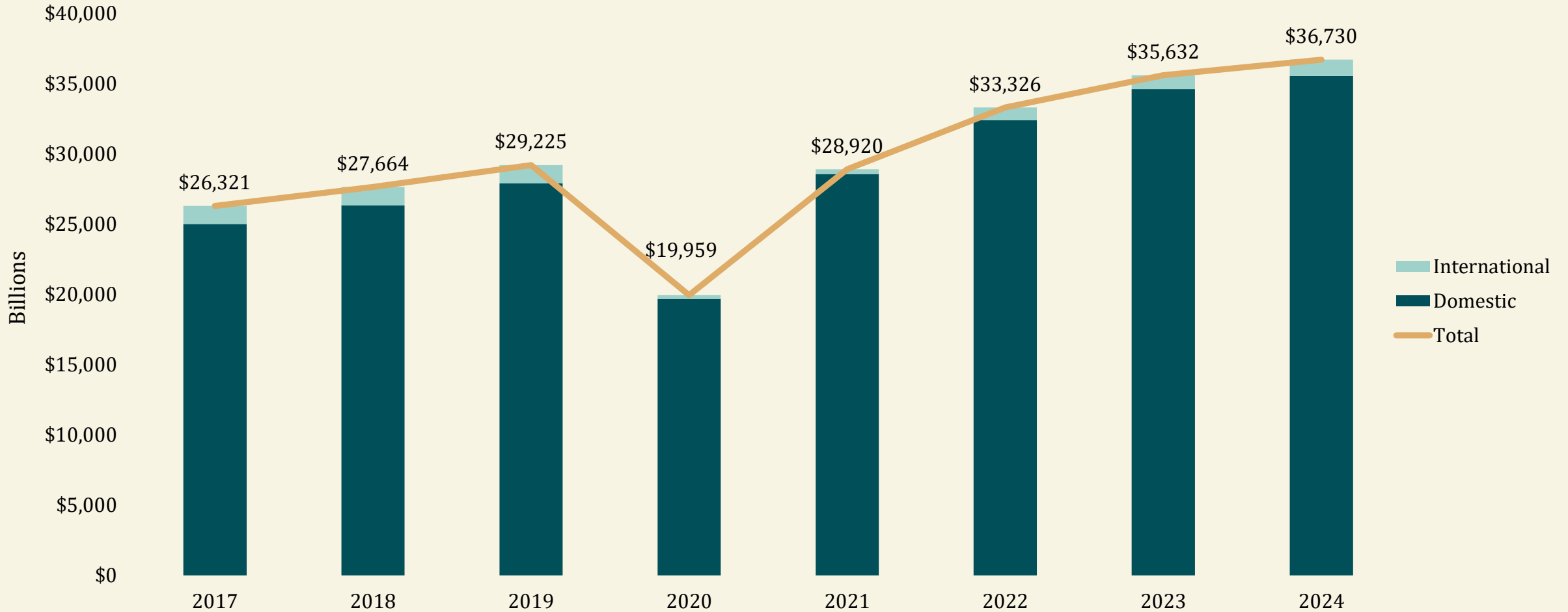
	Annual Goal	Annual Result	% of Goal
Visitor Spending	\$25.8 Billion	\$26.8 Billion	104%
# of Consumer Inquiries	7.24 million	7.54 million	104%
Tier 1 and 2 Co-op Partners	104	106	102%

2025	Annual Goal
Ad Generated Visitor Spend	\$1.4B
Tier 1 and 2 Co-op Partners	92
External Partner Satisfaction	4.5 out of 5.0

An aerial photograph of a sandy beach meeting the ocean. The water is a vibrant turquoise color, and white waves are breaking onto the shore. Four people are visible on the beach, their shadows cast long and dark. The overall scene is bright and sunny.

RESEARCH UPDATE

HISTORICAL VISITOR SPENDING IN NORTH CAROLINA



HISTORICAL VISITOR SPENDING IN NEW HANOVER/BRUNSWICK/PENDER COUNTIES



WHERE ARE WE NOW?

REVISION IN TRAVEL EXPECTATIONS

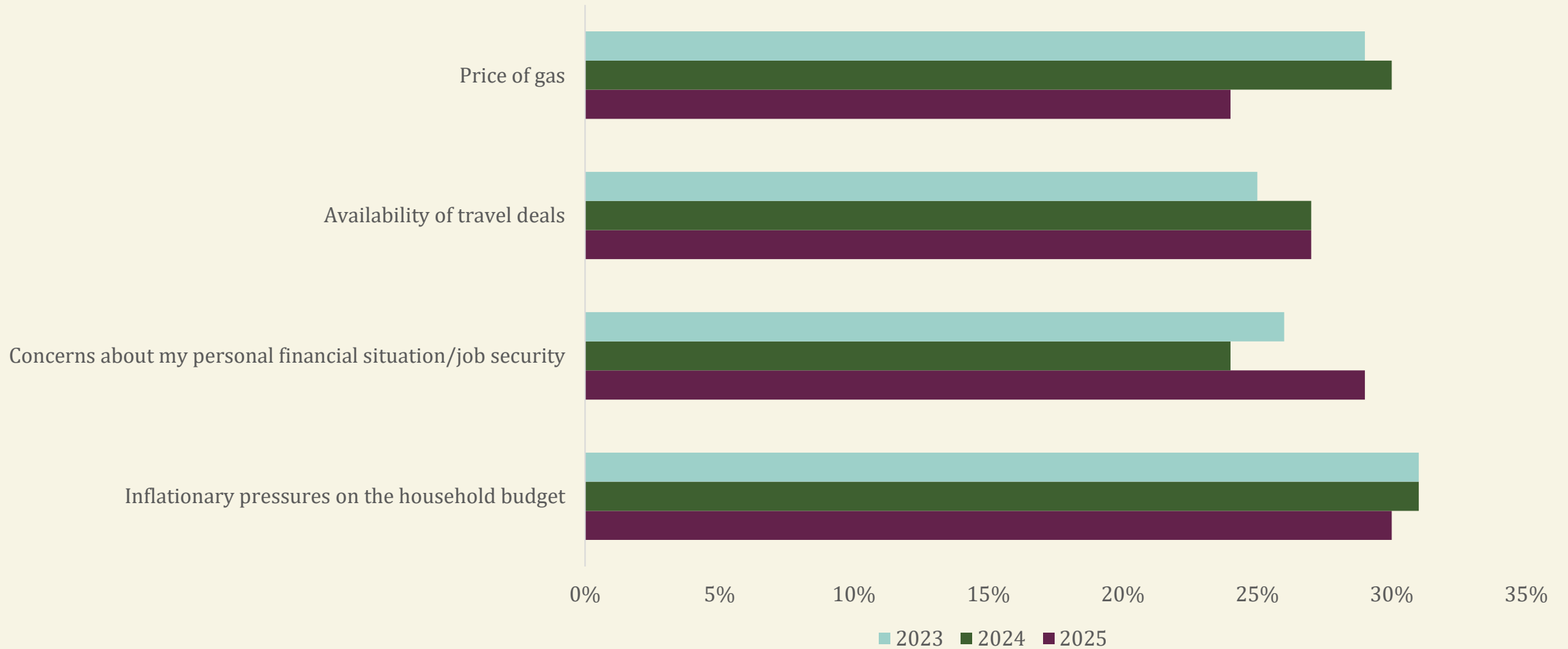
STR AGAIN CUTS 2025-26 U.S. HOTEL FORECAST

STR and Tourism Economics yet again have downgraded their U.S. hotel forecast for both full-year 2025 and 2026. [They cite](#) lower demand due in part to unrelenting uncertainty and inflation. 2025 U.S. hotel occupancy is now forecast to decline year over year to 62.5 percent from 63 percent in 2024. In their prior forecast, issued in June, the companies projected 2025 U.S. occupancy of 62.8 percent. 2025 U.S. average daily rate is now projected to increase 0.8 percent year over year, compared with their prior forecast of 1.3 percent. 2025 U.S. revenue per available room is forecast to decline 0.1 percent year over year, down from the June forecast of a 1 percent increase.

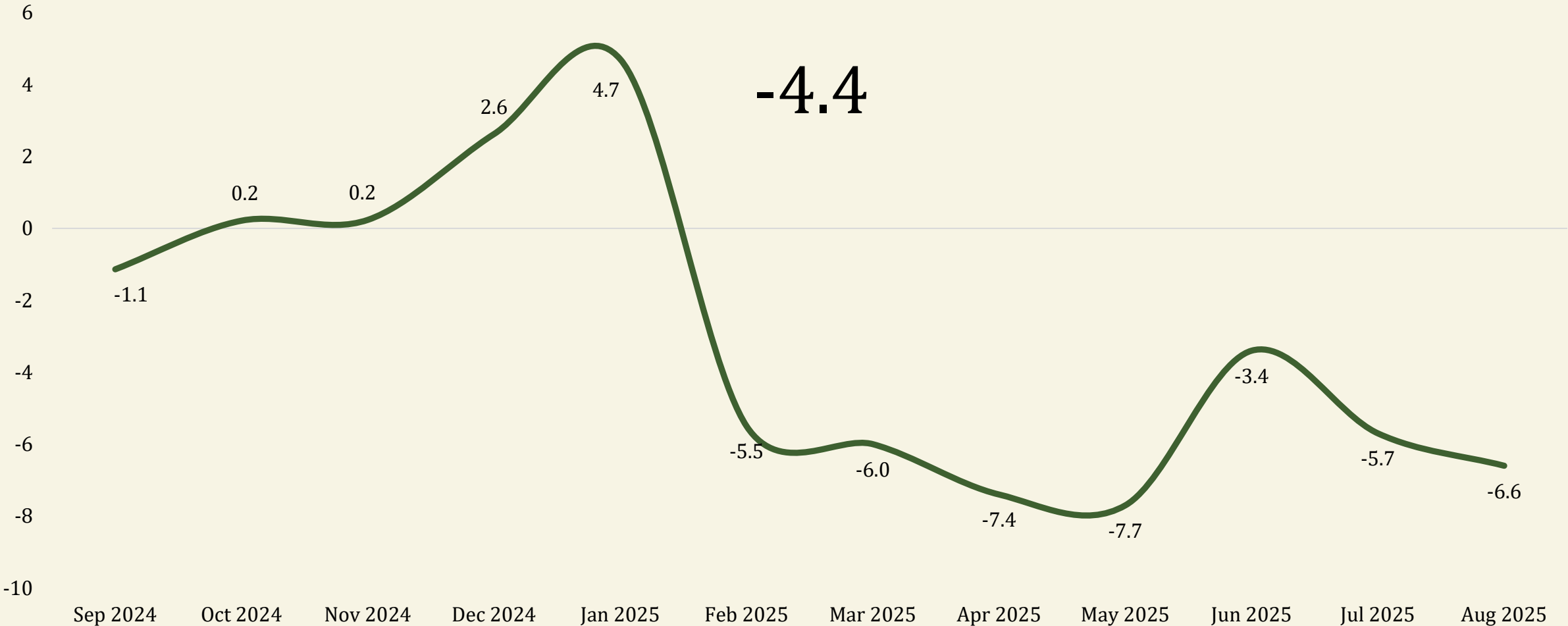
- STR and Tourism Economics now forecast 2026 occupancy to fall to 62.3 percent (down from 63 percent in their June forecast), ADR to increase 1 percent year over year (compared with a previous forecast of 1.3 percent) and RevPAR to increase 0.8 percent (compared with the previous forecast of 1.5 percent).

IMPACTS AFFECTING TRAVEL

% Who Are Extremely Impacted By:



VISITOR ECONOMY INDEX



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



2025 YTD LODGING DATA (THROUGH AUGUST)

Measurement	Commercial Lodging (STR)	Airbnb/HomeAway entire home rentals (AirDNA)	Vacation Rentals (KeyData)
Occupancy	Down 0.3%	Up 0.9%	Down 1.1%
Room Rates	Up 1.9%	Up 13.4%	Down 1.2%
RevPAR	Up 1.6%	Up 14.9%	Up 0.5%
Revenues	Up 2.6%	Up 16.0%	Down 1.3%
Demand	Up 0.7%	Up 1.3%	Down 0.5%
Supply	Up 1.0%	Up 0.6%	Up 0.9%

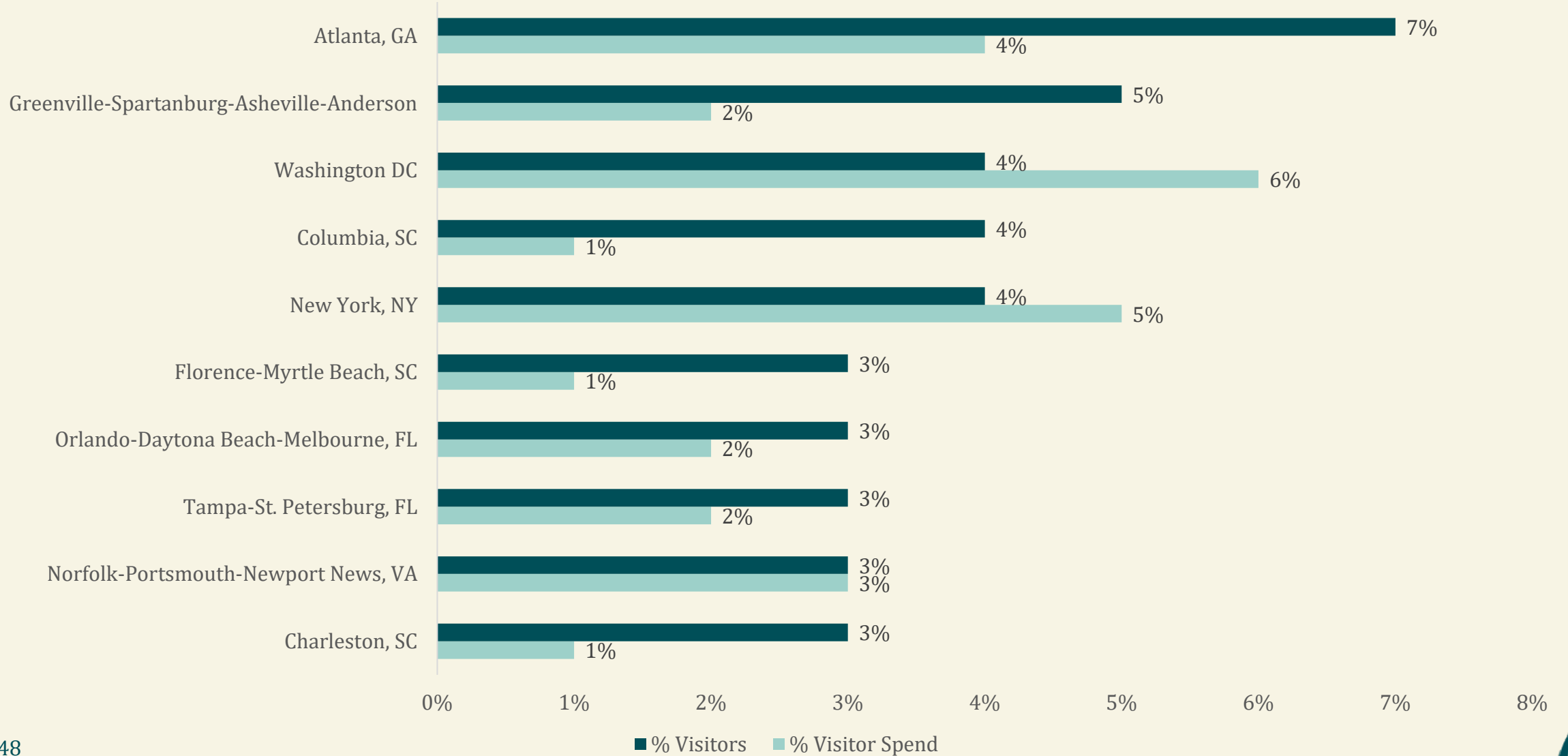


2025 YTD LODGING DATA — NEW HANOVER/BRUNSWICK (THROUGH AUGUST)

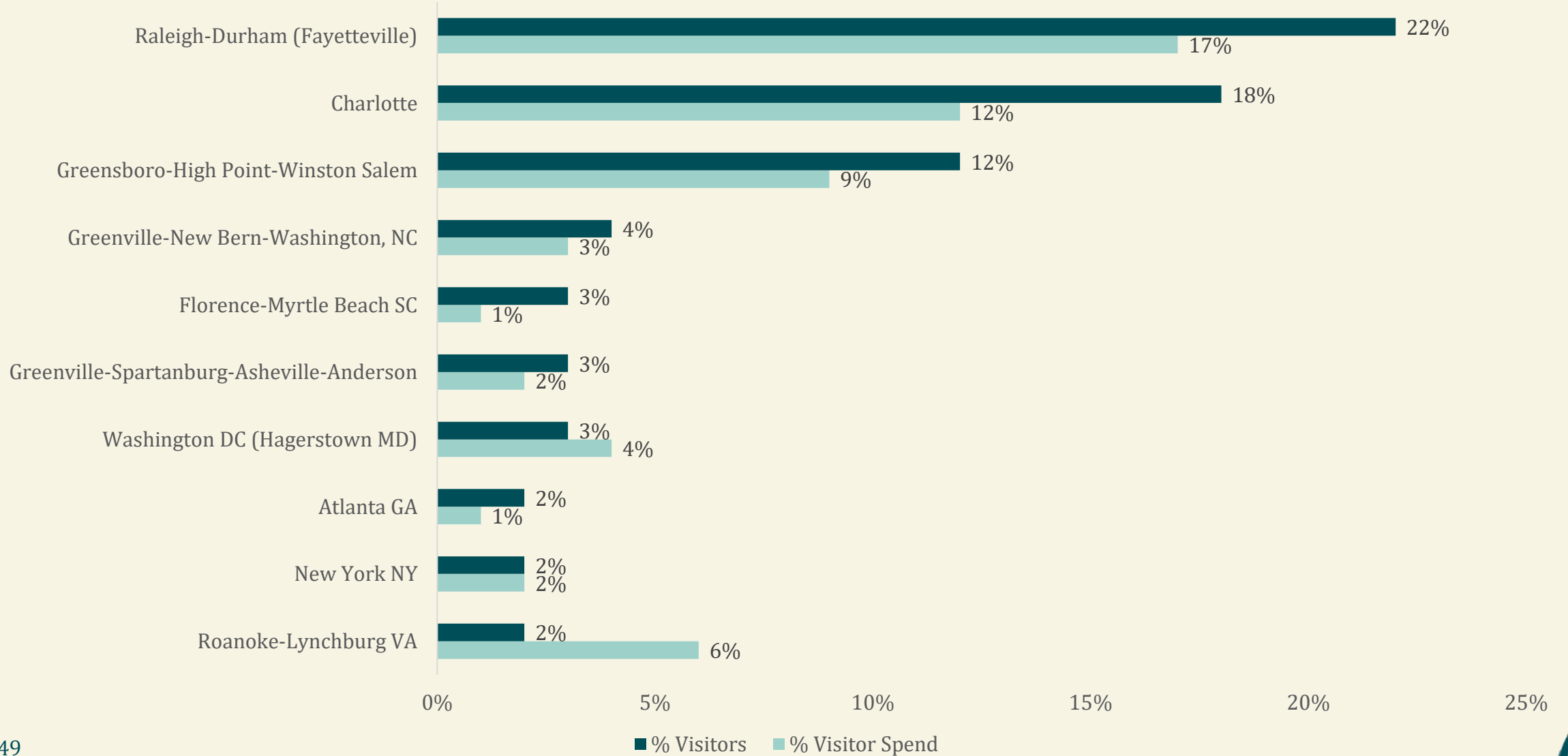
Measurement	Commercial Lodging (STR)	Airbnb/HomeAway entire home rentals (AirDNA)
Occupancy	Down 1.0%	Up 1.7%
Room Rates	Up 3.9%	Up 13.8%
RevPAR	Up 2.9%	Up 15.6%
Revenues	Up 6.6%	Up 21.6%
Demand	Up 2.6%	Up 7.1%
Supply	Up 3.6%	Up 5.3%



OUT-OF-STATE ORIGIN MARKETS YTD



ORIGIN MARKETS YTD NEW HANOVER/BRUNSWICK REGION

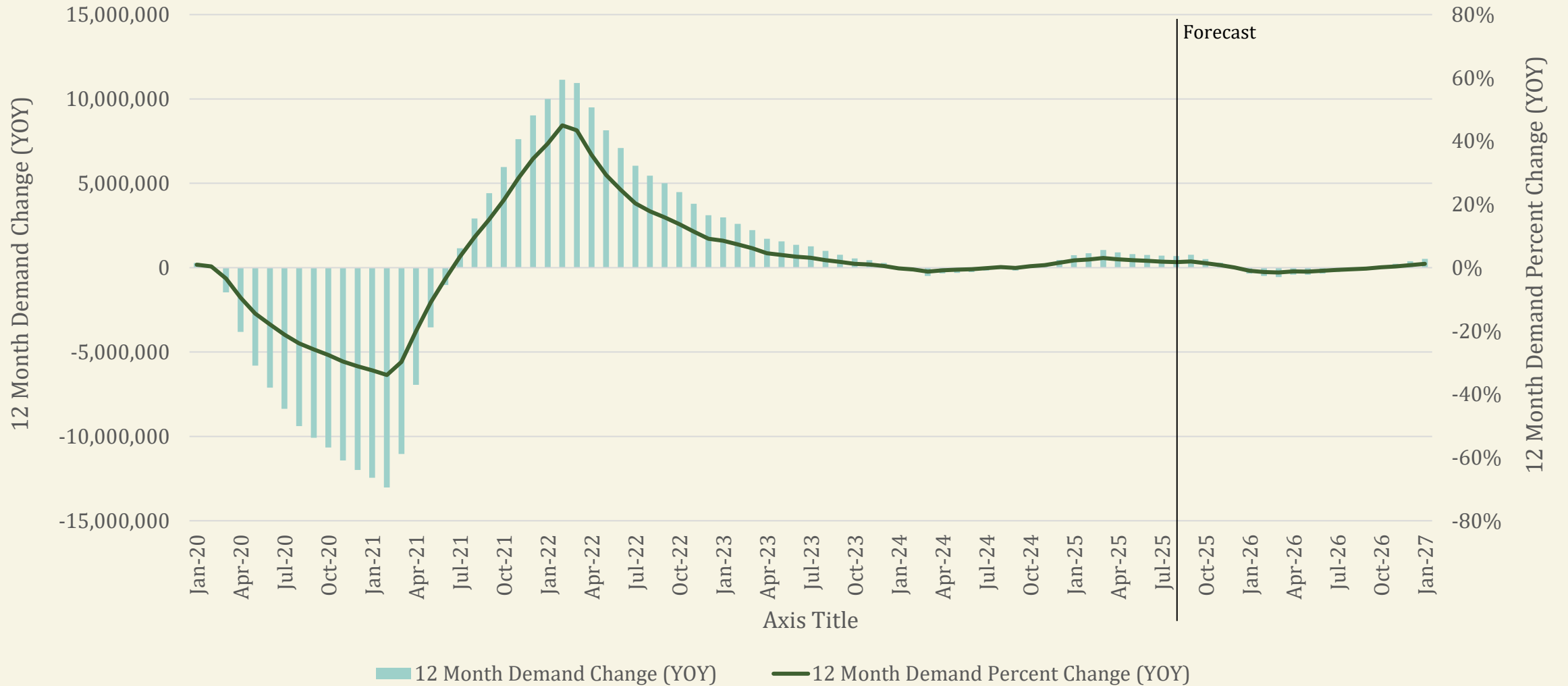




LOOKING FORWARD

COMMERCIAL LODGING FORECAST - DEMAND

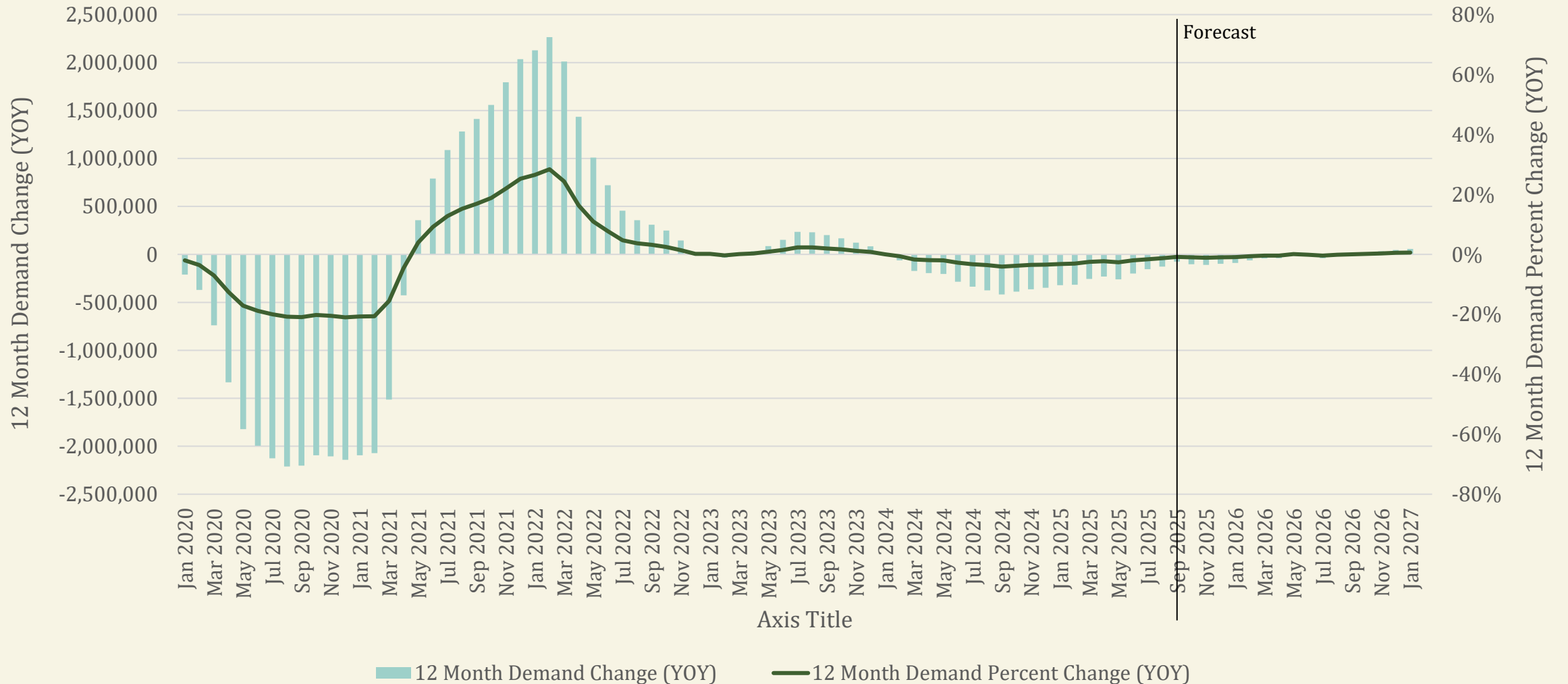
Demand Change



COMMERCIAL LODGING FORECAST — DEMAND — NORTH CAROLINA EAST*



Demand Change



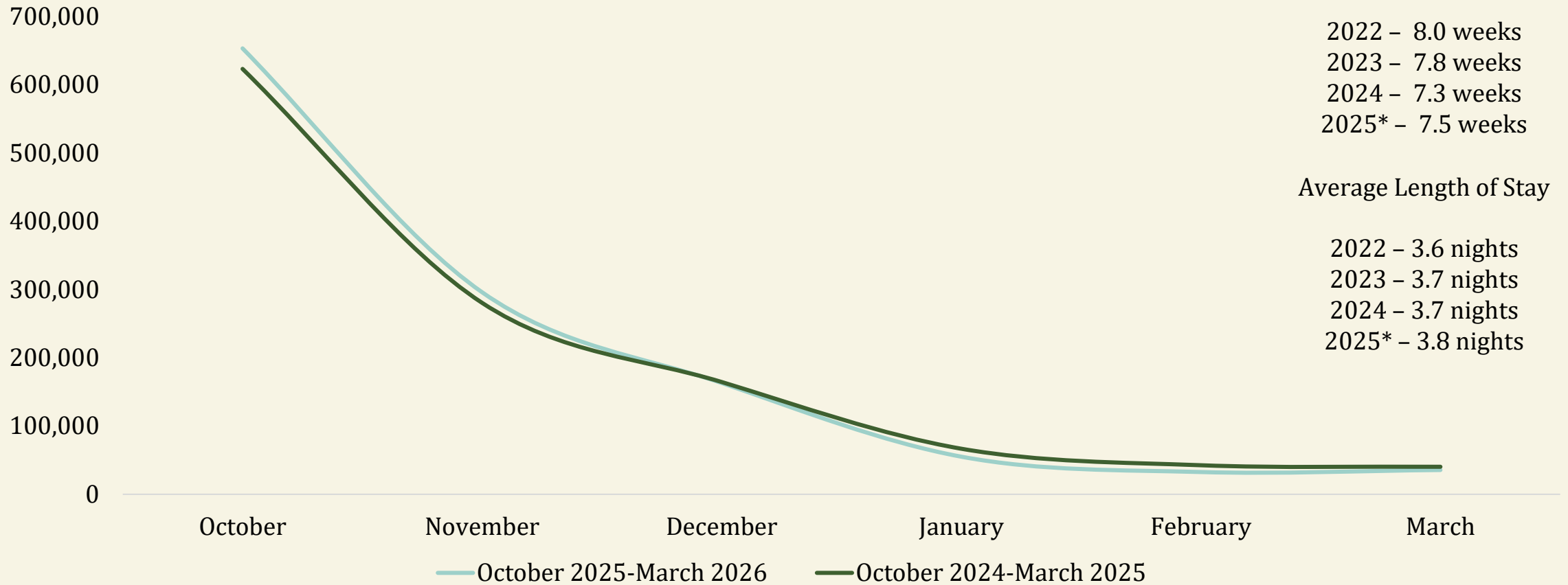
52 Source: COSTAR/STR 2025

*COSTAR regional definition different from Visit NC marketing regions



VACATION RENTAL OUTLOOK

Guest Nights Booked as of October of 2024 & 2025



Average Booking Window

2022 – 8.0 weeks
2023 – 7.8 weeks
2024 – 7.3 weeks
2025* – 7.5 weeks

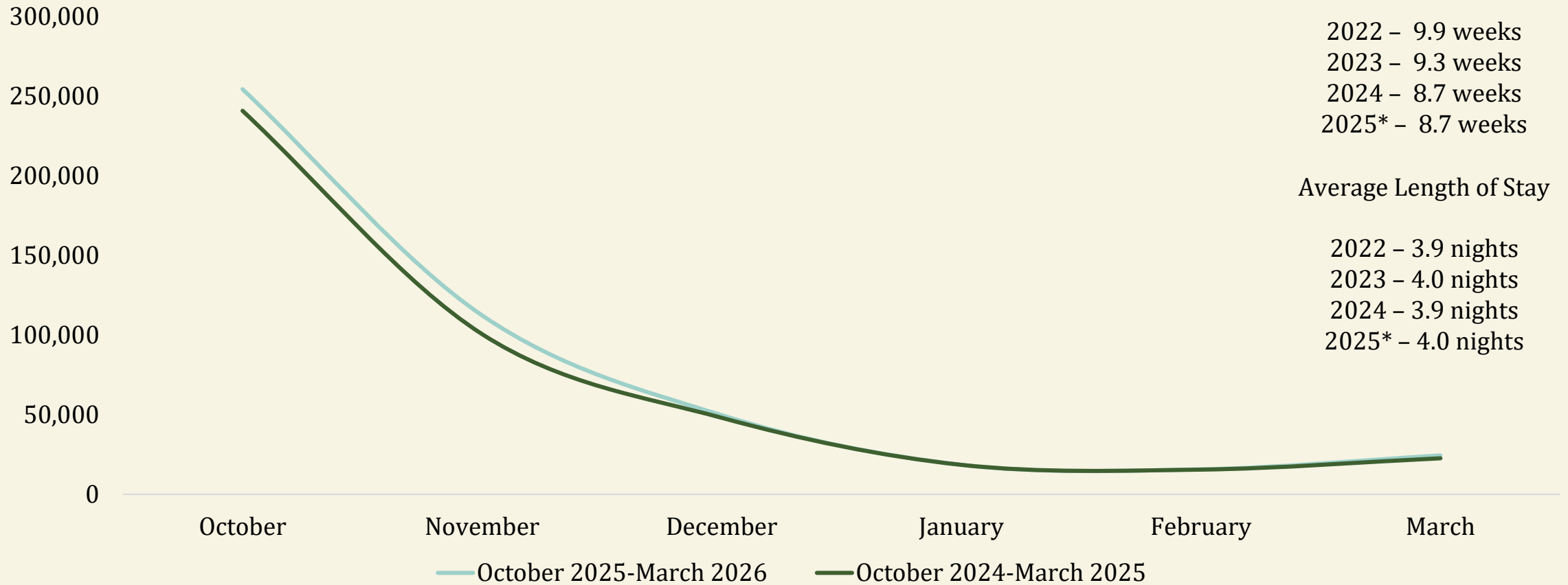
Average Length of Stay

2022 – 3.6 nights
2023 – 3.7 nights
2024 – 3.7 nights
2025* – 3.8 nights



VACATION RENTAL OUTLOOK NEW HANOVER/BRUNSWICK REGION

Guest Nights Booked as of October of 2024 & 2025



Average Booking Window

2022 – 9.9 weeks
 2023 – 9.3 weeks
 2024 – 8.7 weeks
 2025* – 8.7 weeks

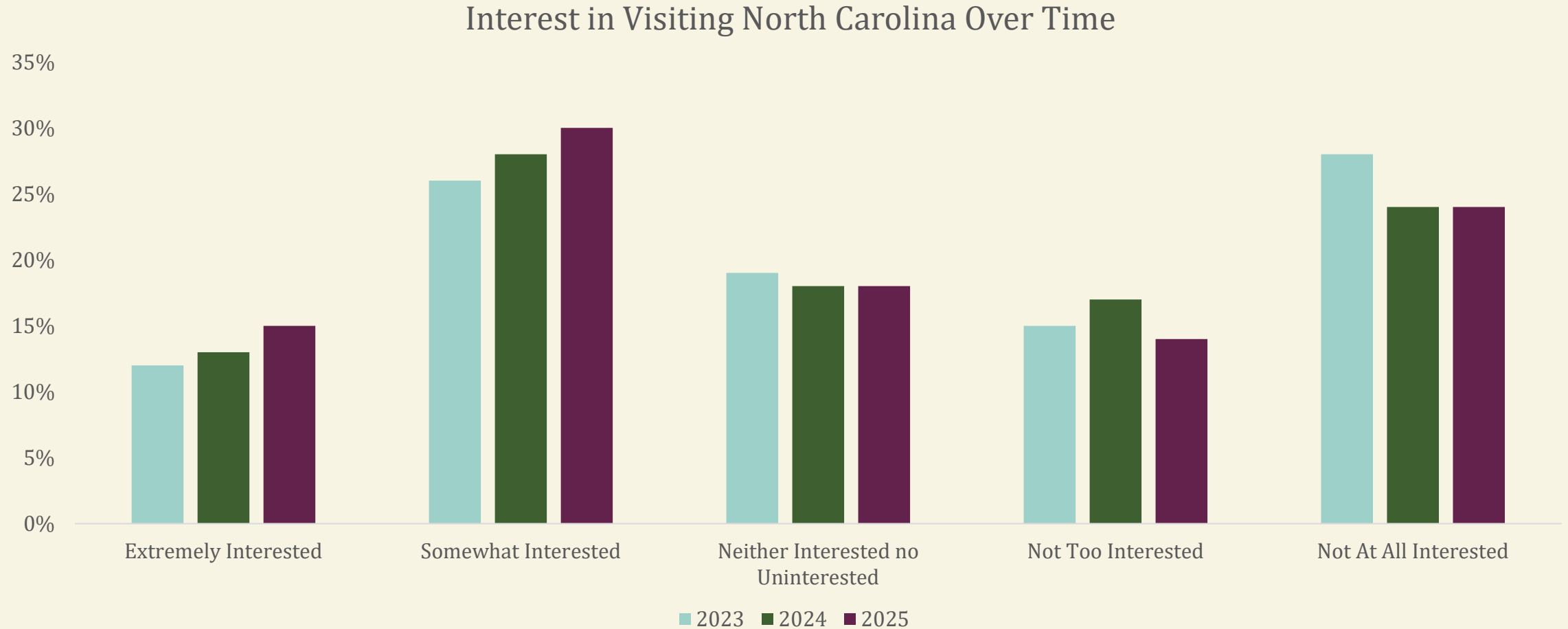
Average Length of Stay

2022 – 3.9 nights
 2023 – 4.0 nights
 2024 – 3.9 nights
 2025* – 4.0 nights

Source: AirDNA, 2025
 *January-August, 2025



U.S. TRAVELER INTEREST IN VISITING NORTH CAROLINA OVER TIME





VISIT NORTH CAROLINA OVERVIEW

Thanks!

Marlise Taylor

Visit NC

Marlise.taylor@VisitNC.com

919-447-7748