

VISIT NORTH CAROLINA OVERVIEW

NC Beach, Inlet and Waterway Association

May 9, 2025

Visit North Carolina



The EDPNC Mission

The EDPNC 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 on new business recruitment, existing employer support, international trade and export assistance, small business star up counseling, and tourism promotion.

Our Teams



Business
Recruitment



International
Trade



Existing Industry
& Expansions



Travel & Tourism



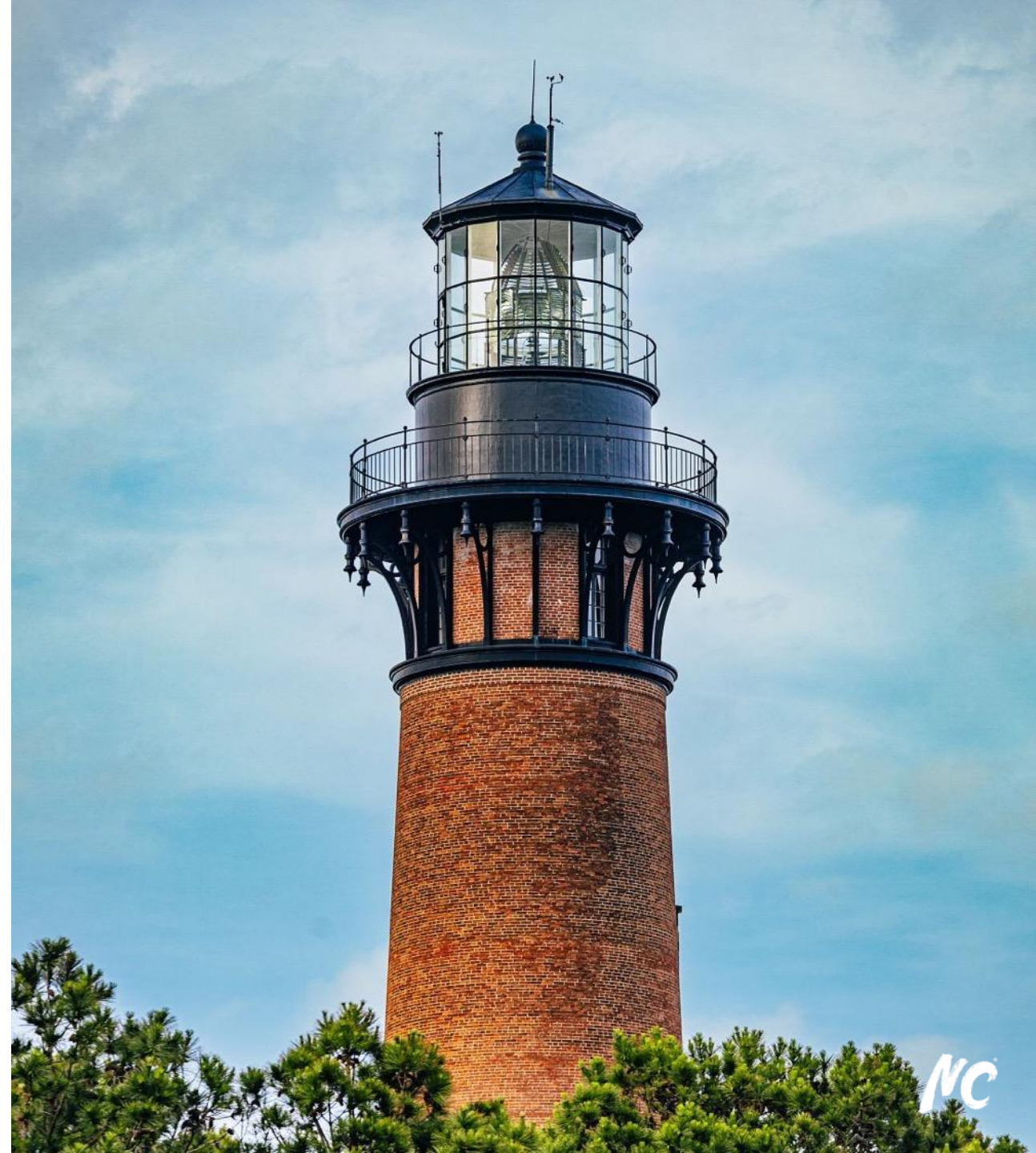
Small Business
Advisors

NORTH CAROLINA CLAIMS 5th MOST VISITED STATE IN DOMESTIC TRAVEL

2024 Visitation Rank

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

Source: OmniTrak-TravelTrak America 2025





Visit North Carolina

Our Mission:

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.





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:

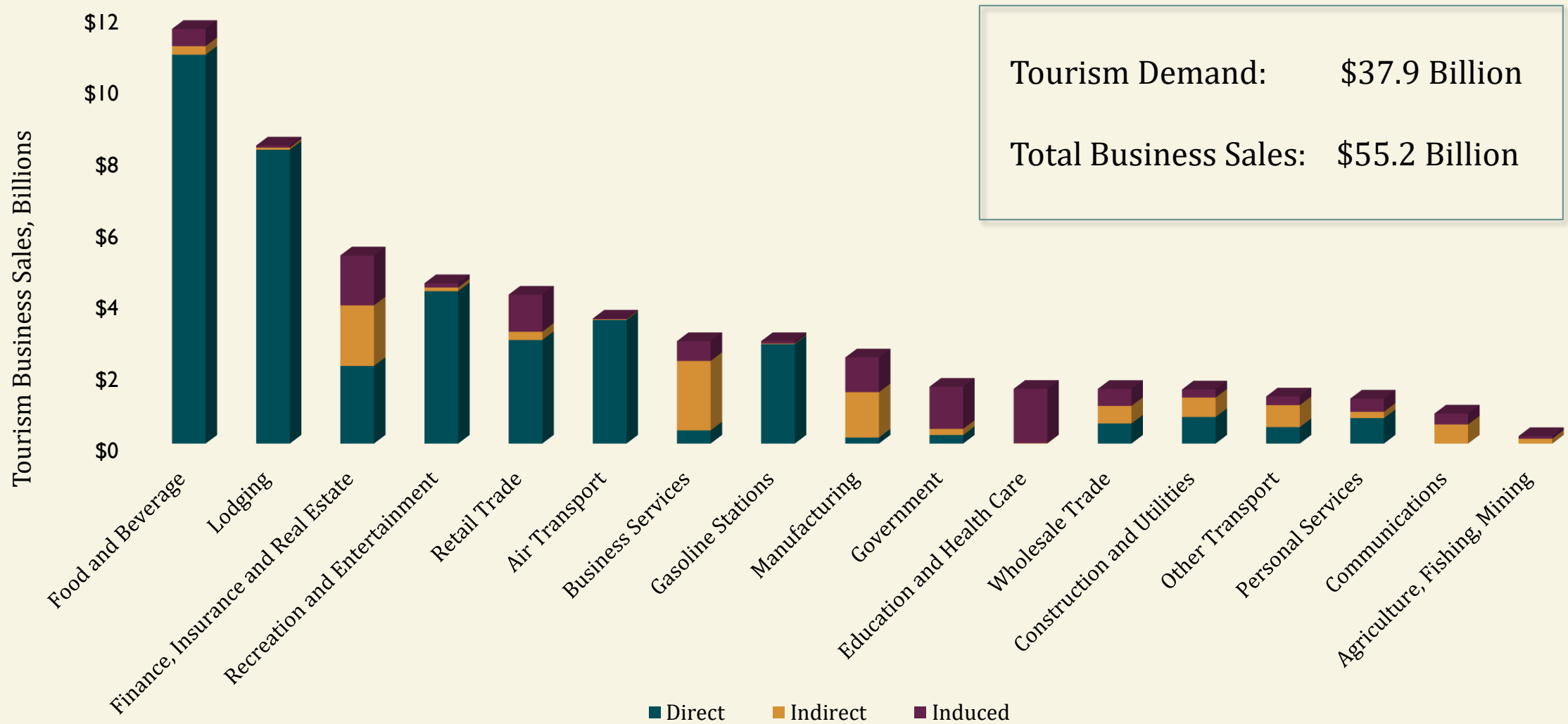
1. Raise awareness.
2. Inform.
3. Stay relevant.
4. Extend an inclusive welcome.
5. Inspire.

TOURISM IS ECONOMIC DEVELOPMENT (2024)

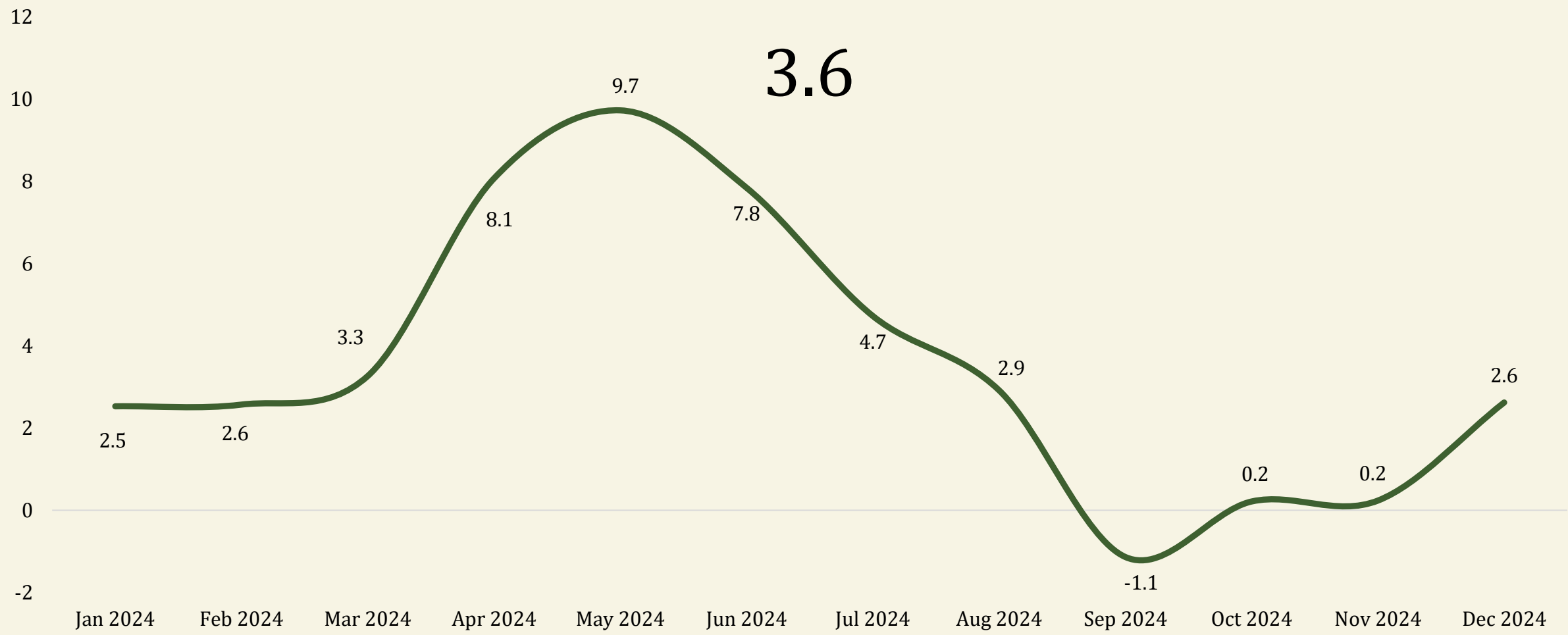
- More than **39 Million** visitors
- **\$36.7 Billion** in Visitor Spending (+3.1%)
- More Than **230,000 Jobs** (+1.4%)
- **\$1.4 Billion** in State Tax Revenues (+1.1%)
- **\$1.3 Billion** in Local Tax Revenues (+4.3%)



TOURISM IMPACT ON ALL OTHER SECTORS



2024 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

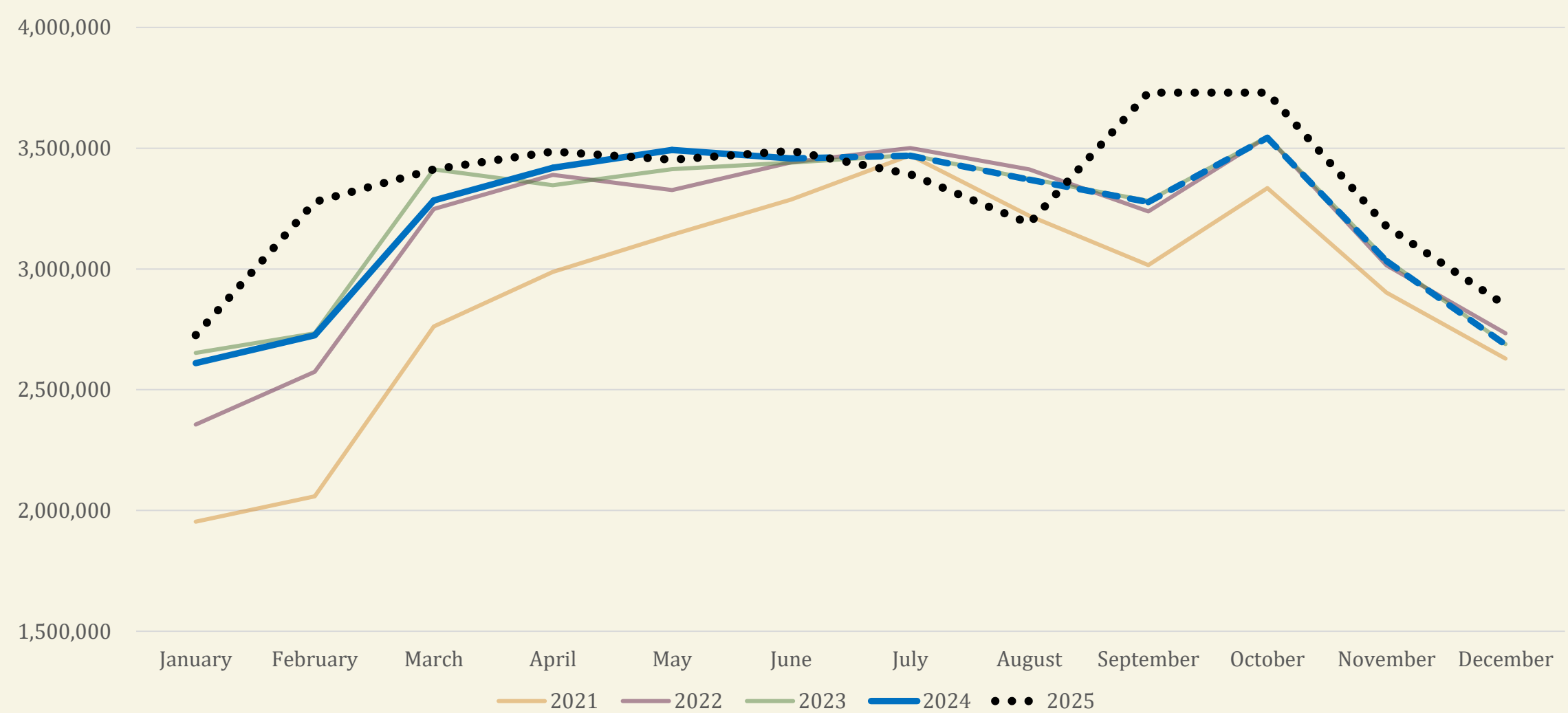


2024 YEAR-END LODGING DATA

Measurement	Commercial Lodging (STR)	Airbnb/HomeAway entire home rentals (AirDNA)	Vacation Rentals (KeyData)
Occupancy	Up 0.9%	Up 1.1%	Down 5.3%
Room Rates	Up 1.9%	Up 5.5%	Down 0.8%
RevPAR	Up 2.7%	Up 6.9%	Down 1.8%
Revenues	Up 3.0%	Up 15.6%	Down 4.6%
Demand	Up 1.1%	Up 8.9%	Down 6.1%
Supply	Up 0.2%	Up 7.2%	Down 0.5%



COMMERCIAL LODGING FORECAST - DEMAND

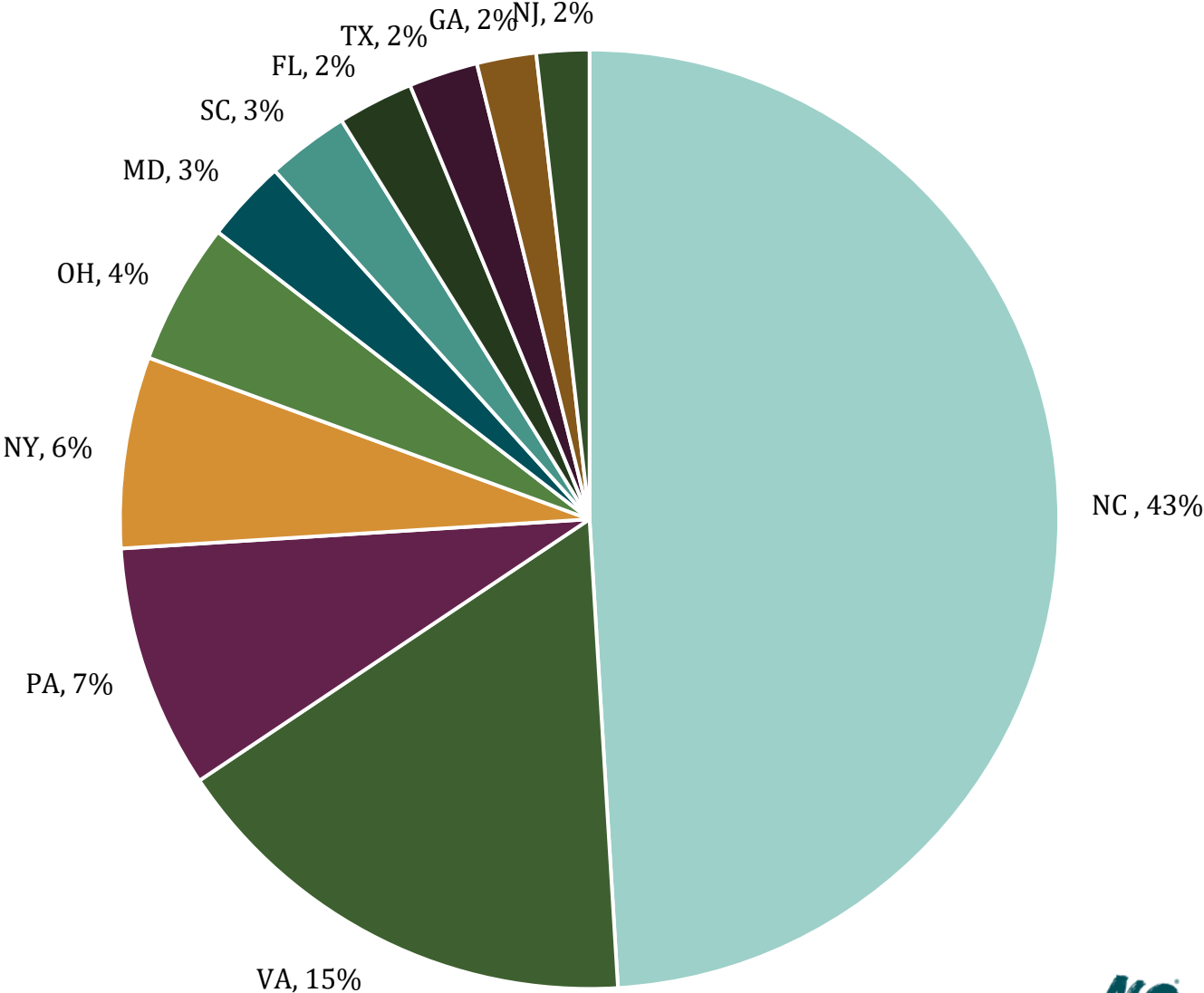


2024 COASTAL VISITOR SUMMARY

- Ninety percent of all Coastal Region overnight visitors traveled for leisure purposes, while nine percent came to conduct business.
- The majority of overnight travelers to the coast in 2024 visited during the summer followed by fall.
- The party size for the average Coastal Region visitor party was 3.3 in 2024. 39 percent of travel parties included children under the age of 18.
- The average Coastal Region overnight visitor party trip expenditure was \$1,252 in 2024. In-state overnight travelers spent on average \$880 and out-of-state overnight visitors spent \$1,370.
- The top states of origin for overnight visitors to the Coastal Region in 2024 were NC, VA, PA, NY, OH, MD, SC, FL.

STATE OF ORIGIN OF OVERNIGHT VISITORS TO NORTH CAROLINA — COASTAL REGION (2024)

- 43 percent of overnight visitors to the coast in 2024 were in-state residents.
- The next ten states represented 45 percent of overnight visitors to the coastal region.



Source: OmniTrak-TravelTrak America, 2025



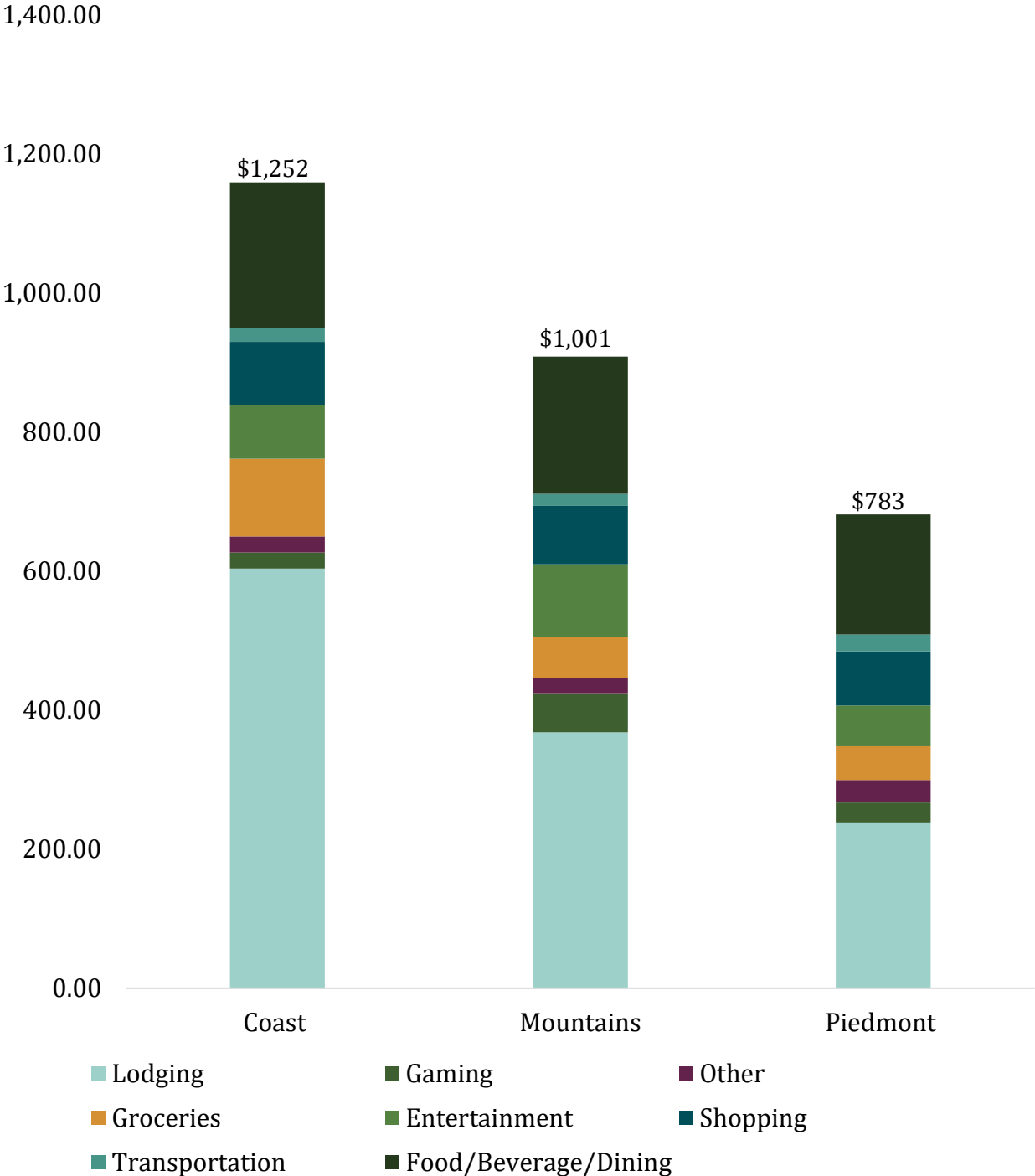
AVERAGE TRIP SPENDING FOR NC VISITOR PARTIES BY TYPE OF VISITOR (2024)

- The top categories for spending for overnight visitors include lodging, food and beverage and transportation.
- Overnight visitors spend 132% more on average than daytrip visitors in 2024.
- Out-of-state overnight visitors spent 69% more than overnight resident travelers in 2024.



AVERAGE TRIP SPENDING FOR OVERNIGHT NORTH CAROLINA VISITOR PARTIES BY REGION (2024)

- Overnight visitors to the coastal region spent more per trip in 2024 than visitors to other regions.
- However, the length of stay for coastal visitors is longer.



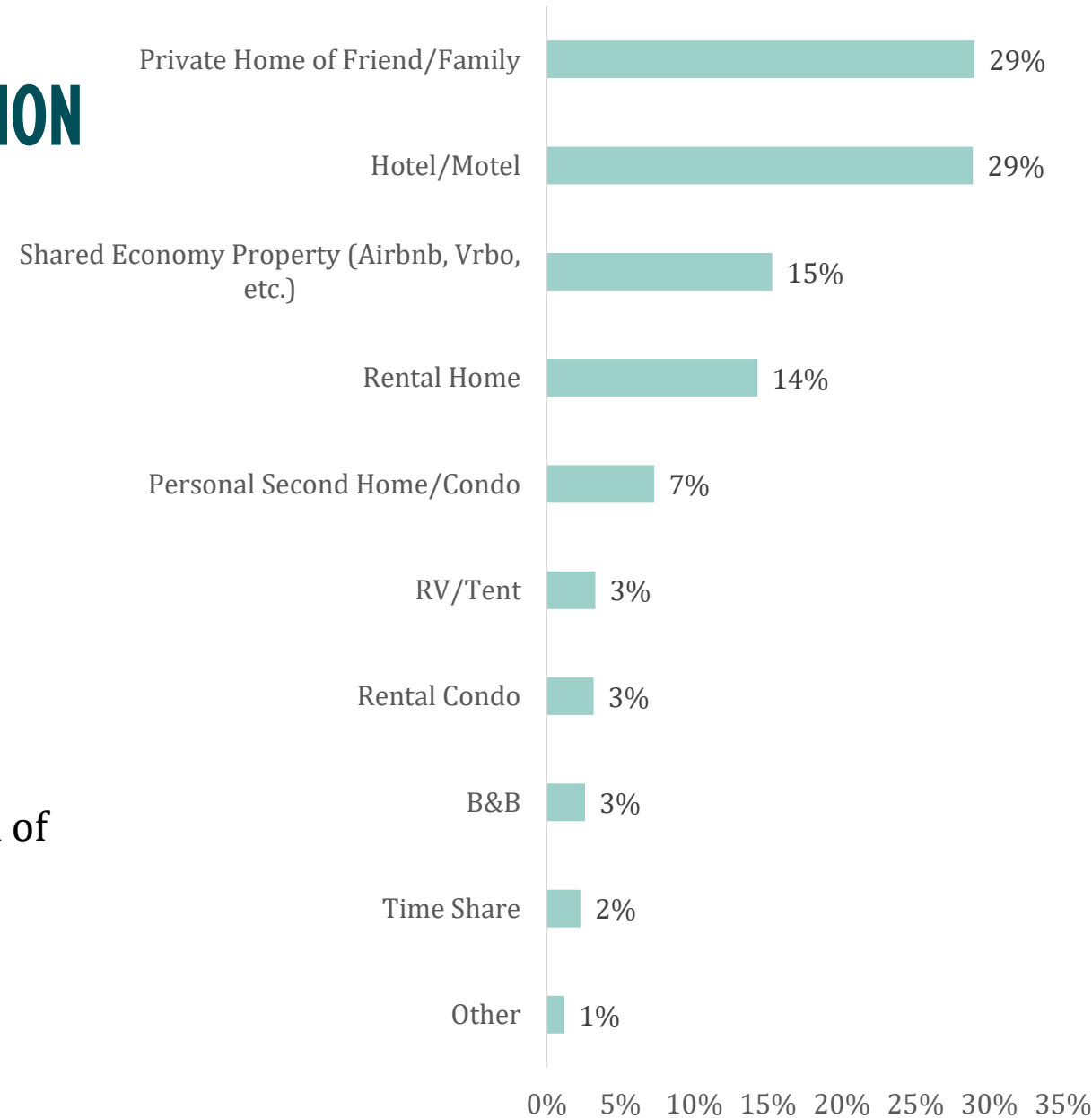
ACCOMMODATIONS USED IN COASTAL REGION (2024)

- Coastal Region visitors were more likely to stay in a private home or hotel/motel while in the state, followed closely by shared economy and rental home.
- Approximately 3 percent of overnight visitors to the coast reported a stay in a bed and breakfast.

Average Length of Stay: 3.4 Nights

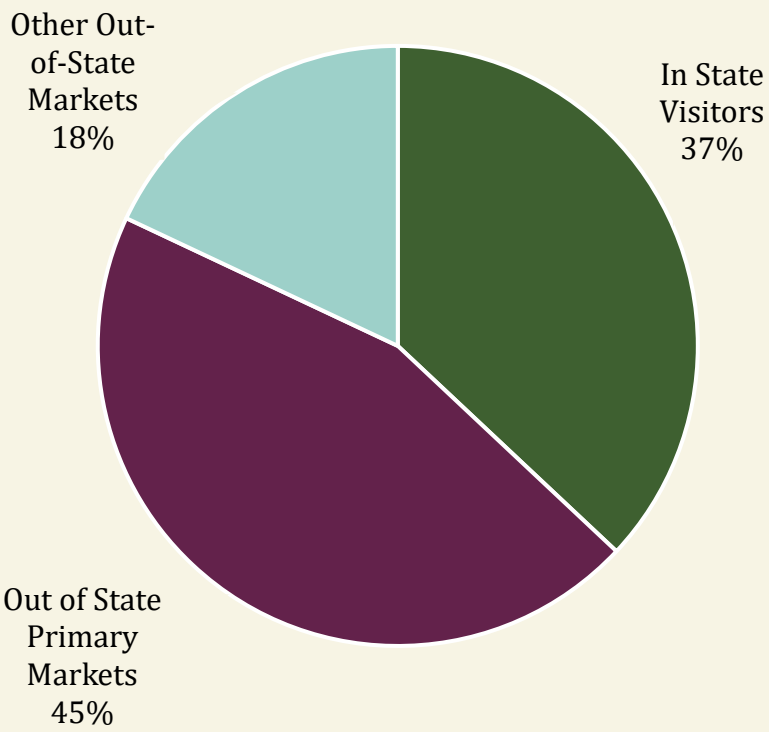
* Multiple responses allowed; thus, percentages do not add to 100%

Source: OmniTrak-TravelTrak America, 2025

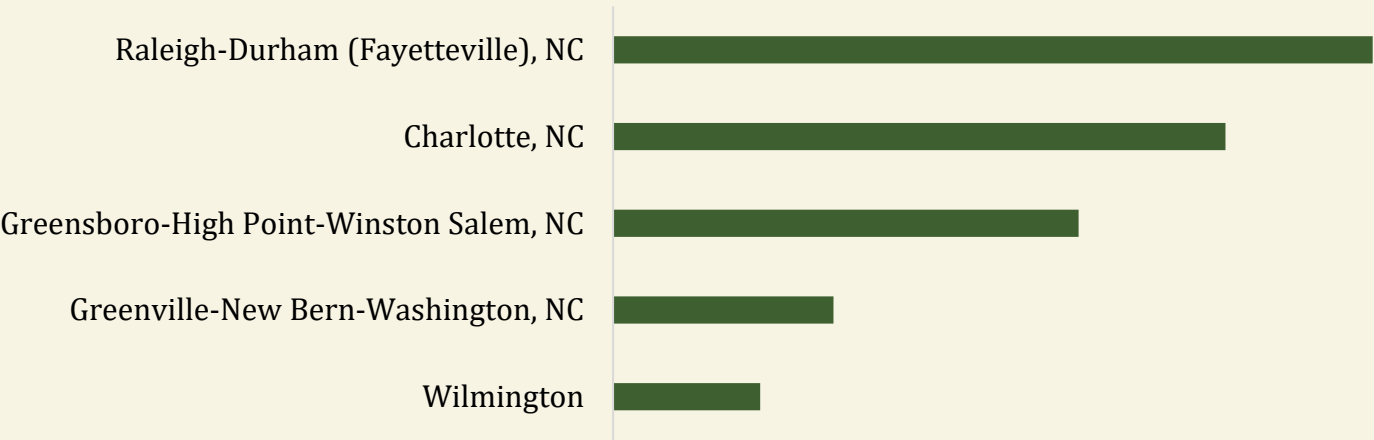


2024 VISITATION TRENDS

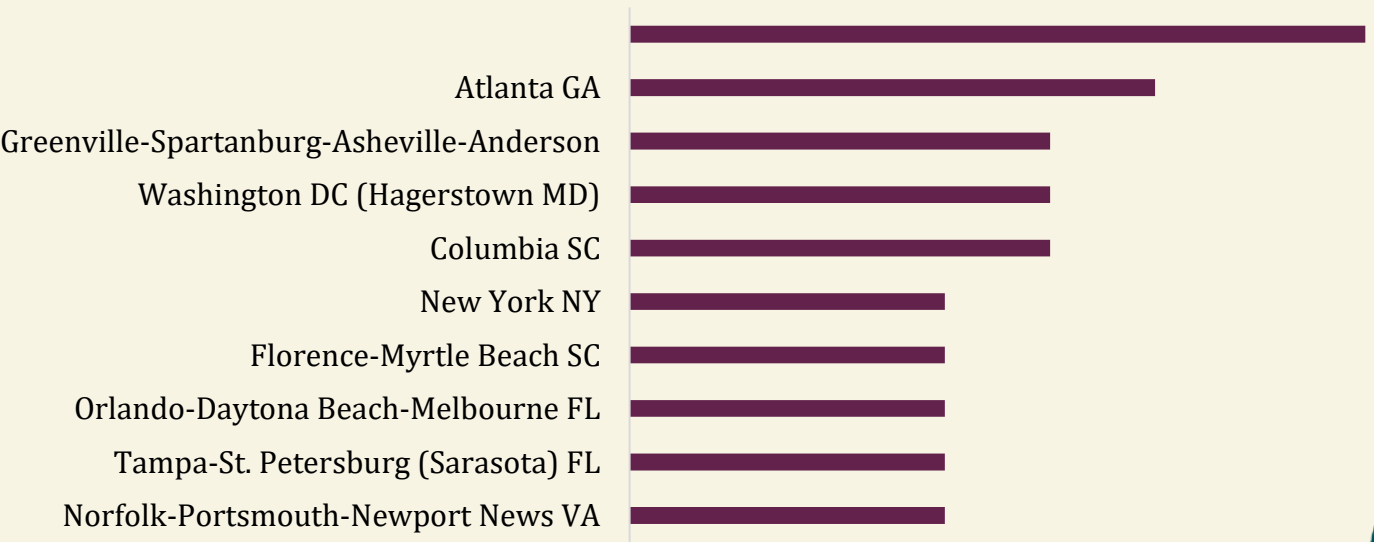
In-State vs. Out-of-State Visitors



Top 5 In-State Origin Markets



Top 10 Out-of-State Origin Markets

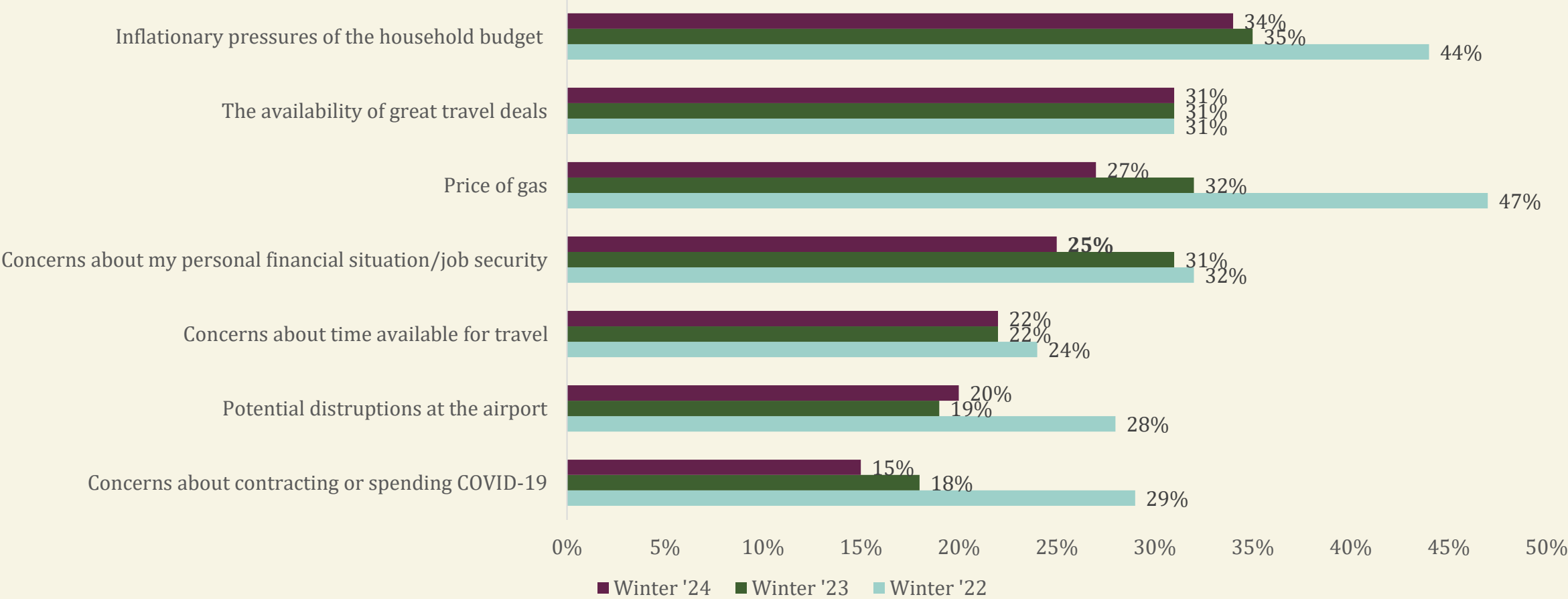


Source: Zartico, 2025



IMPACTS ON TRAVEL

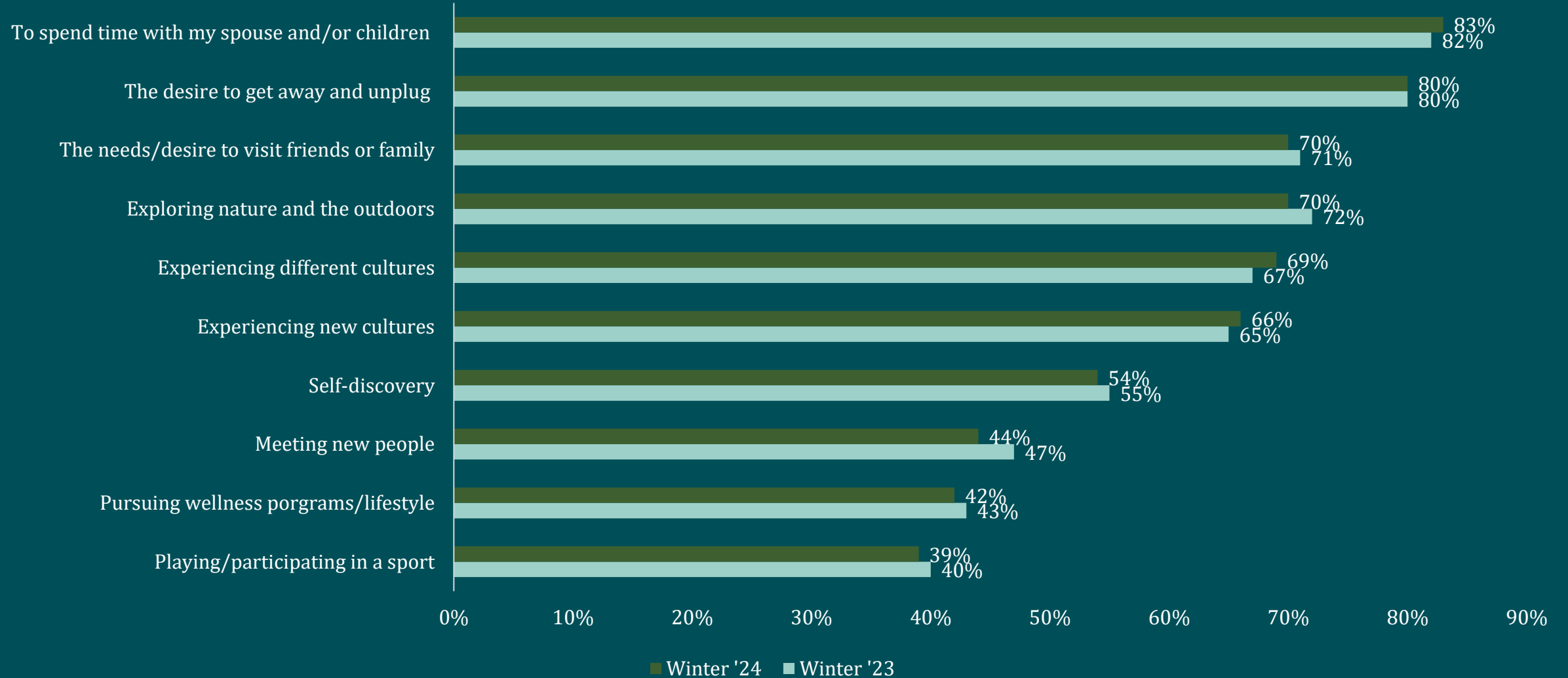
% Who Are Extremely Impacted By...



Data is **bold** indicates a significant difference from Winter 2023
Base: North Carolina Prospect (N=1674)
Source: MMGYs 2024 “Portrait of American Travelers “Winter Edition”



MOTIVATIONS FOR TRAVEL



Base: North Carolina Prospect (N=1674)

Source: MMGY's 2024 "Portrait of American Travelers "Winter Edition"

DESTINATION CHOICE

Influential When Selecting a Destination	2023	2024
Beautiful scenery	73%	75%
Food and drink scene	60%	62%
Safety	62%	59%
Outdoor/nature activities	52%	57%
Historical significance of a destination	48%	53%
Focus on family activities	35%	36%
A sense of tradition (place family has traditionally visited)	31%	34%
Music scene	30%	30%
The ethnic diversity and multicultural population of a destination	25%	27%
Nightlife/bars	25%	27%
The destination's reputation for environmental responsibility	17%	17%
The destination's commitment to social justice and equality	15%	13%
LGBTQ+ travel offerings	7%	6%

Data is **bold** indicates a significant difference from Winter 2023

Base: North Carolina Prospect (N=1674)

Source: MMGY's 2024 "Portrait of American Travelers "Winter Edition"

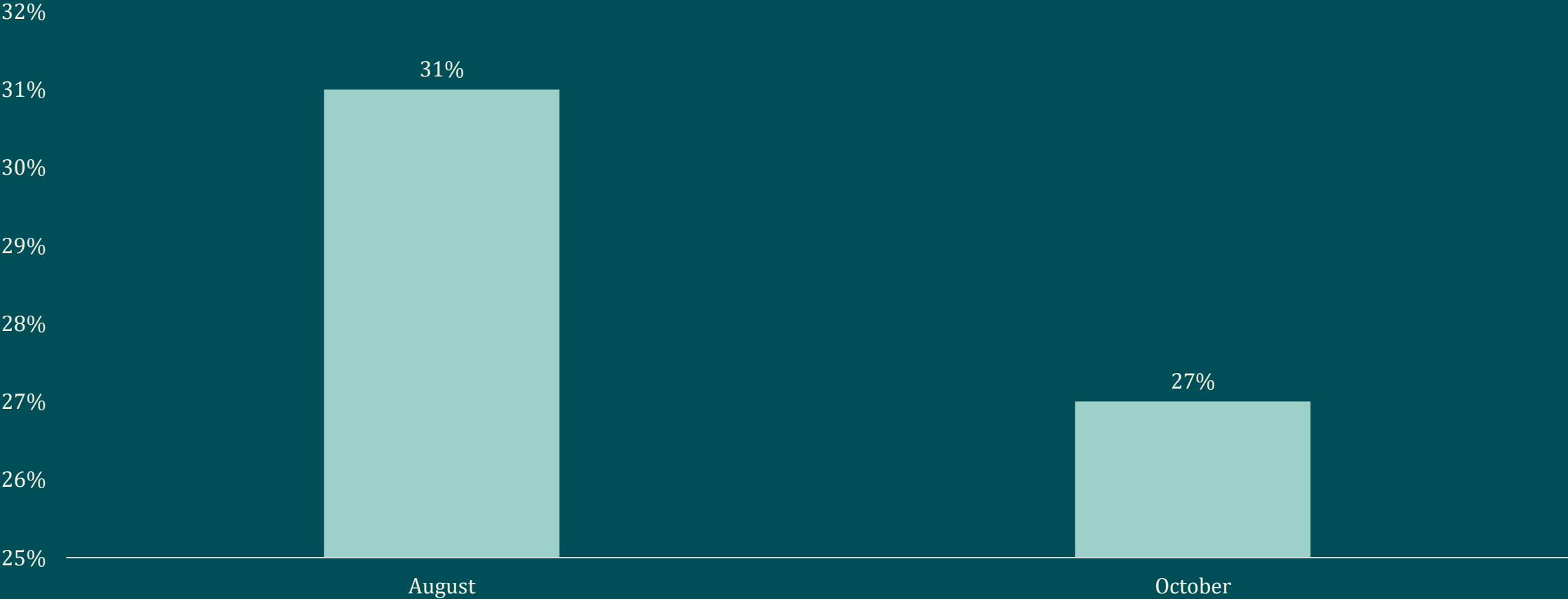




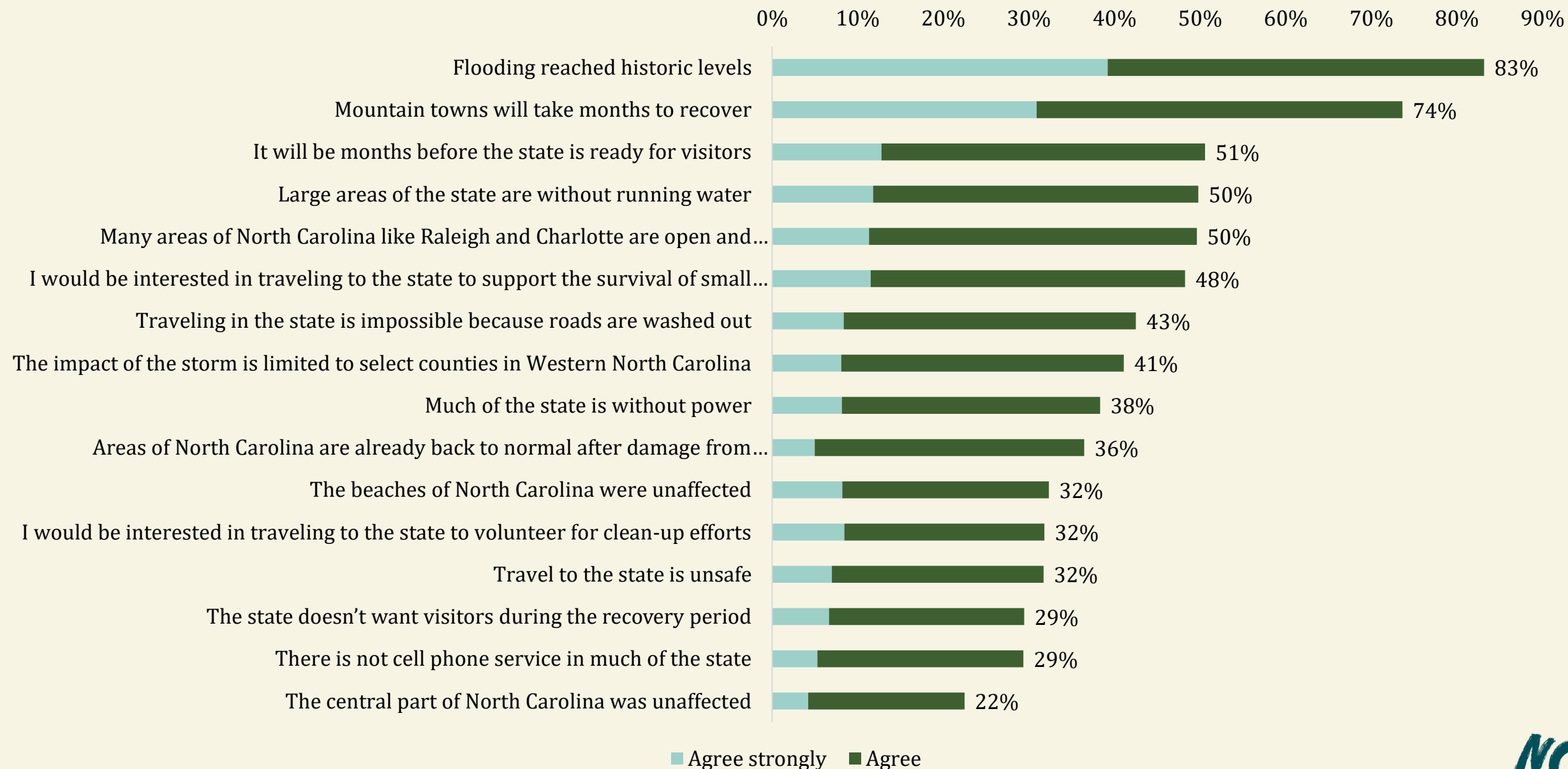
RECOVERY MARKETING

CHANGE IN LIKELIHOOD TO VISIT

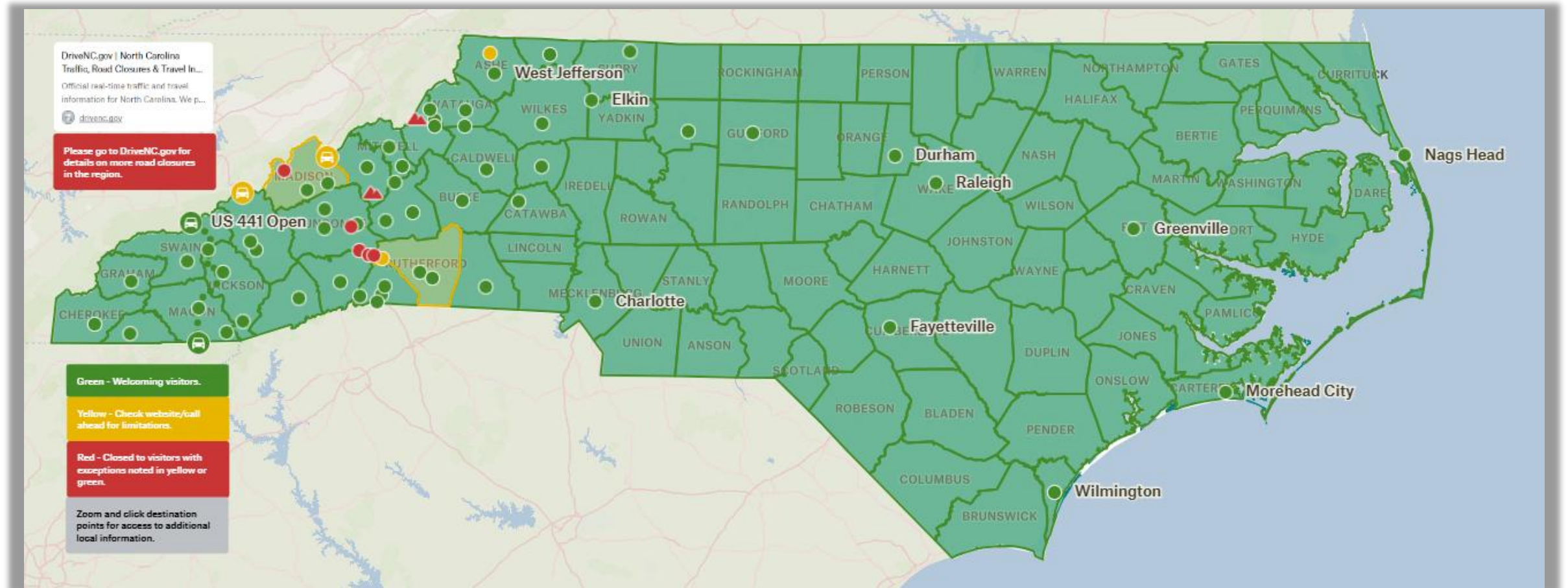
Likelihood to Visit North Carolina (Extremely Likely & Somewhat Likely)



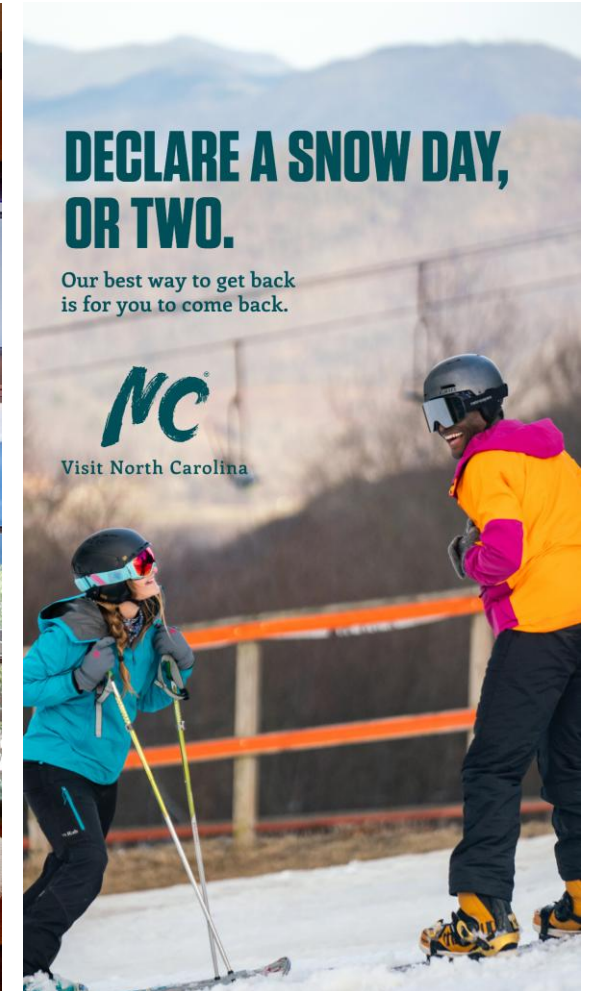
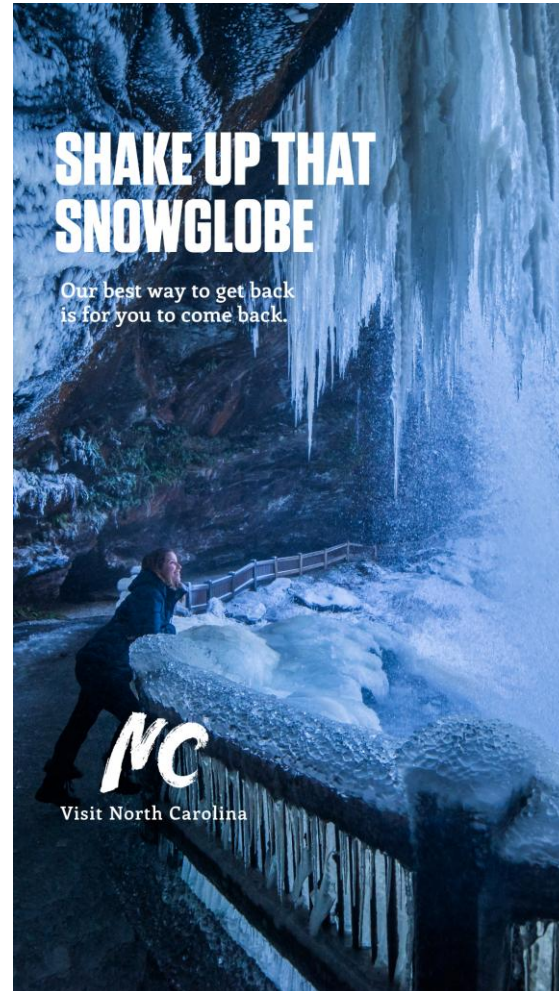
Knowledge of Hurricane Impacts





MOUNTAIN STATUS MAP



RECOVERY MARKETING | MTNS WINTER ADS



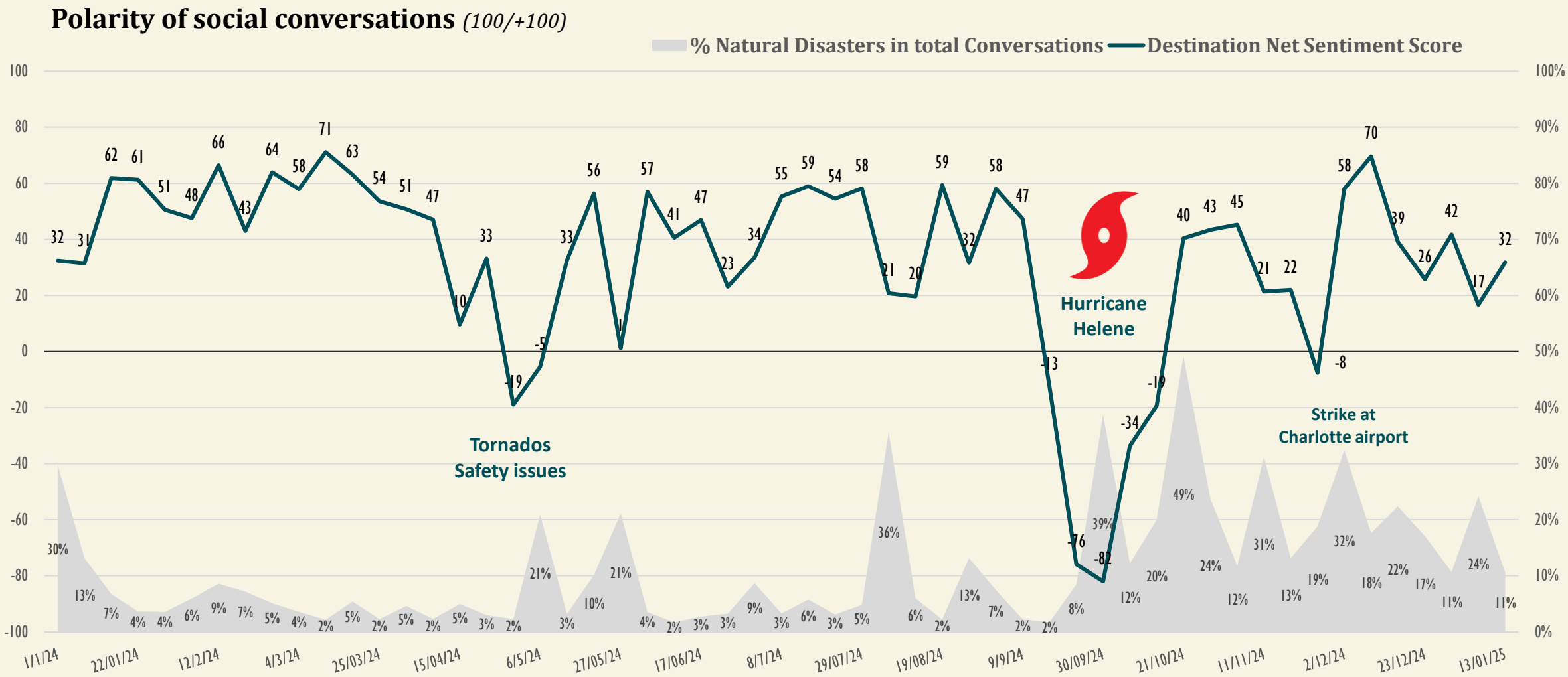
CAMPAIGN APPROACHES (through June 2025)

Coast & Piedmont Campaign		Mountain Recovery	
Markets	Contiguous states, Northeast, Midwest, Mid-Atlantic	NC, SC, GA, FL, TN, AL	
Tactics	Cable, CTV, Sponsored Content, Display & Rich Media, Audio, Paid Social, Paid Search	CTV, DOOH, Sponsored Content, Audio, Display, Paid Social, Paid Search	
Messaging	 An aerial view of a winding river through a lush green landscape. The text 'SOMEWHERE ELSE, PEOPLE ARE ONLY WATCHING A LIVE STREAM.' is at the top. Below it, 'For Real, Visit NC' with the NC logo. At the bottom is a 'Start Planning' button.	 A scenic view of a mountain peak at sunset or sunrise, with a river in the foreground. The text 'SPRING IS A TIME OF RENEWAL, INCLUDING OURS.' is at the top. Below it, 'Our best way to get back is for you to come back.' At the bottom is a 'Come Visit' button, the NC logo, and 'Visit North Carolina'.	



RESULTS FROM Q4 2024

SOCIAL REPUTATION TRENDS FOR NORTH CAROLINA



Note: The Travelsat Net Sentiment Score measures the polarity of social conversations about the destination from a scale of -100 to +100 (% of positive - % of negative social mentions)



THANK YOU!

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Visit North Carolina

