



NORTH CAROLINA

Department of Transportation



NC MOVES 2050

Drivers and Opportunities: Travel and Tourism

February, 2019

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EXECUTIVE SUMMARY

Executive Summary

In 2017, North Carolina was the 6th most visited state in the country and the economic impact included \$23.9 billion in visitor spending as well as 225,000 industry generated jobs¹. To support this vibrant component of the state's economy in the future, a safe, reliable and convenient transportation system is essential for connecting visitors to destinations.

Each region of the state has unique opportunities for visitors, but travel trends are similar across North Carolina. Most visitors drive to the state, primarily come for leisure and summer is the most popular season.

NCDOT administers several programs and initiatives that are important to tourism, such as welcome centers, the highway wildflower program and litter sweeps. Arguably, the most important function of the agency is to maintain one of the country's largest highway systems supporting mobility needs for residents and visitors alike.

Over the past decade, technology advancements have changed numerous facets of the travel and tourism industry. Advances in mobile applications, direct booking, trip planning and mobility options will continue to evolve as new services are offered to enhance the travel experience.

The tourism industry faces numerous challenges with growing urban congestion, stiff competition from neighboring states for visitors and adequate labor to support growing demands. Aligning North Carolina's long-term vision for transportation and tourism positions the state for sustained economic competitiveness.

INTRODUCTION

Travel and Tourism in North Carolina

- This paper reviews the role, impact and relationship between tourism and the multimodal transportation system in North Carolina.
- The analysis considers recent travel and tourism trends, access to major tourist and recreational sites and available visitor travel data.
- The paper identifies opportunities to tighten the connection between transportation system planning/development and tourism industry goals.
- Interviews were conducted with tourism industry professionals who shared their perspective on the strengths, weakness, challenges and opportunities for the industry. These interviews included representatives from VisitNC, Visit Charlotte, the North Carolina Restaurant and Lodging Association and the North Carolina Travel & Tourism Coalition.
- This paper reports 2017 North Carolina travel and tourism data collected by VisitNC.
- National research related to state DOT best practices and opportunities for advancing tourism considerations in the transportation planning process were incorporated in this paper.

How Does Travel and Tourism Link to NC Moves 2050

Safe, reliable and convenient transportation is fundamental to supporting tourism and enhancing the state's competitiveness for domestic and international visitors. Highways, airports, transit systems, passenger rail, ferries, accommodations for pedestrians and cycling and the multimodal connections that knit these systems together not only connect visitors to destinations but also play an important role in shaping the visitor experience.

Recent changes in transportation policy have elevated the importance of Travel and Tourism. Fixing America's Surface Transportation Act (FAST ACT) was passed by Congress and signed into law in 2015 providing legislation and funding to improve the Nation's surface transportation infrastructure, including roads, bridges, transit systems and rail transportation networks.²

The FAST ACT and subsequent regulations define the transportation planning process that state Department of Transportation (DOT) must carry out in order to receive federal transportation funds. A prominent addition to the planning process was the formal consideration of travel and tourism as one of 10 planning factors intended to guide state DOTs in their consideration of projects, strategies and services (23 U.S.C. 135(d)(1)(I) & (J) and 23 CFR 450.206(a)(10)).

This change in transportation policy reflects a renewed national recognition of the linkage between transportation investment and enhancing tourism as an important component to state and local economies.



Aviation provides the gateway to Southeast United States with commercial airports throughout North Carolina.



Ferry connects travelers to their destinations in the Outer Banks and offers a unique experience for riders.



Bicycle/Pedestrian facilities provide first- and last-mile connections through active transportation and recreation.



Public Transportation connects riders throughout regions and provides an alternative option to driving.



Highways transport travelers across and through North Carolina, safely and efficiently.



Rail links North Carolina to the Southeast United States region and is essential to the economic development of the state.

How Does Travel and Tourism Link to NC Moves 2050



NC Restaurant
& Lodging Association



NORTH CAROLINA
DEPARTMENT of
COMMERCE

VISITNC.COM



NC DEPARTMENT
OF NATURAL AND
CULTURAL RESOURCES

NC LEAGUE
OF MUNICIPALITIES



This paper captures the impact of tourism on transportation. This can inform the state's transportation vision, goals and objectives defined in the NC Moves 2050 Plan.

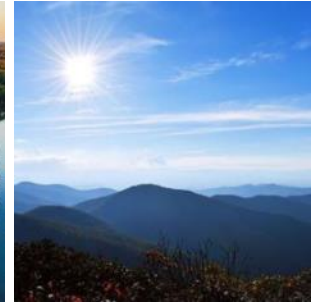
Past research at the national level highlights the importance of DOT and tourism industry coordination³. The extent, frequency and structure of this coordination varies from state to state. Most examples of coordination are impromptu in nature based on a particular issue or event, while project-level coordination typically involves traveler information systems, welcome centers and tourism signage.

Recently, travel and tourism has received recognition within the federal transportation planning process. Considering tourism in transportation investment decisions can impact economic growth and overall project development.

Collaboration of tourism businesses, associations and coalitions with transportation planning agencies can play a significant role in supporting tourism. The logos above show a sample of the travel and tourism organizations that operate within North Carolina.

Travel and Tourism Drivers and Opportunities in North Carolina

- Highways are the most important transportation system supporting tourism with 90% of visitors arriving by car.
- Investments in North Carolina commercial airports are critical to supporting the state's economy and should remain a priority for future enhancements to serve business and leisure travel demands.
- Accessibility to North Carolina destinations play a major role in the state's future competitiveness for visitors.
- Transportation needs that are important to residents are also important to the tourism industry.
- Visitor/welcome centers and roadside management efforts, such as anti-litter campaigns and the North Carolina Wildflower Program are frontline services helping to distinguish the North Carolina visitor experience.
- Industry coordination with NCDOT, transportation providers and planning agencies is fundamental to supporting continued growth in travel and tourism.



WHERE ARE WE TODAY?

Overview

This paper highlights 2017 data collected by Visit NC, a private non-profit organization contracted by the Department of Commerce to lead tourism marketing efforts for the state.⁴

- Nearly 46 million travelers came to North Carolina, making it the **6th most visited state** in terms of domestic tourism.
- 88% came for **leisure purposes** including visiting friends and relatives, outdoor recreation, entertainment and sightseeing, 9% came to conduct business such as attending meetings and conventions while the remaining 3% reportedly visited for “other” reasons.
- **Summer is the most popular season** for North Carolina visitors, July is the single largest month for travel with 10.3% of all visitors, followed by spring, fall then winter.
- **90% of visitors drove** while 7% traveled by air.
- Visitors **spent over \$23 billion** while traveling in North Carolina.

North Carolina’s tourism industry has seen **steady growth** in all three regions - Mountains, Piedmont and Coast. New restaurants continue to open while existing ones expand. Hotels and rental rooms continue to increase and the tourism workforce is rapidly growing with **1 in 50 North Carolina residents directly employed by tourism**. A wide range of activities attract visitors to the state, including beautiful beaches, scenic mountains, vibrant urban centers, rich historic sites and outdoor recreation.



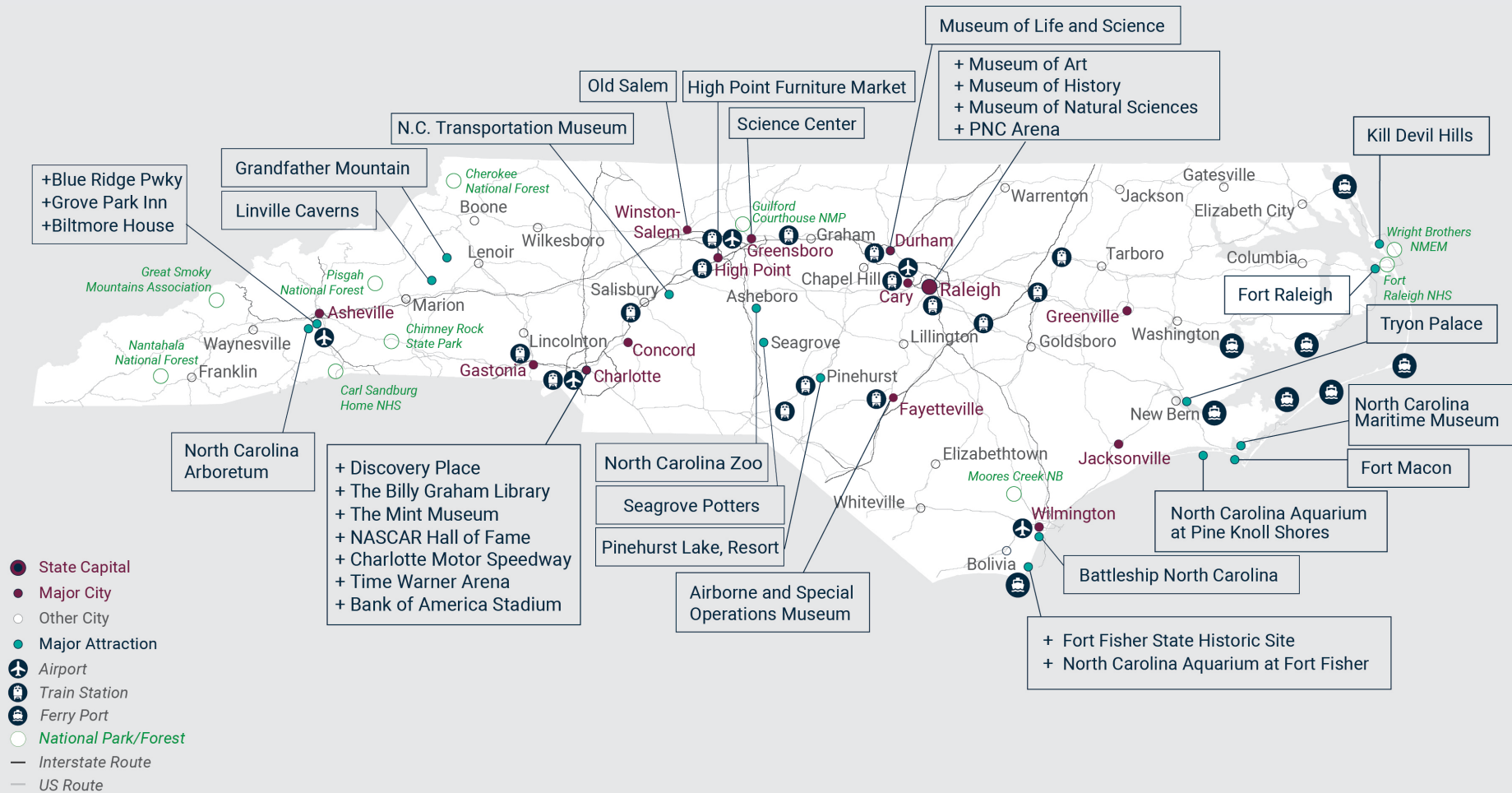
2017 North Carolina Visitor Profile

Visit NC works closely with third-party research organizations and government agencies to monitor domestic and international visitation to North Carolina. This research provides information to shape the strategic direction of Visit NC. With this research, industry partners are able to tactically plan, implement and evaluate processes and programs.⁵

Objectives for Visit NC Research:

1. Increase awareness of North Carolina’s tourism economic impact.
2. Increase understanding of the economic impact of tourism on the state and on individual areas.
3. Enhance partner understanding of tourism research and current statistics.

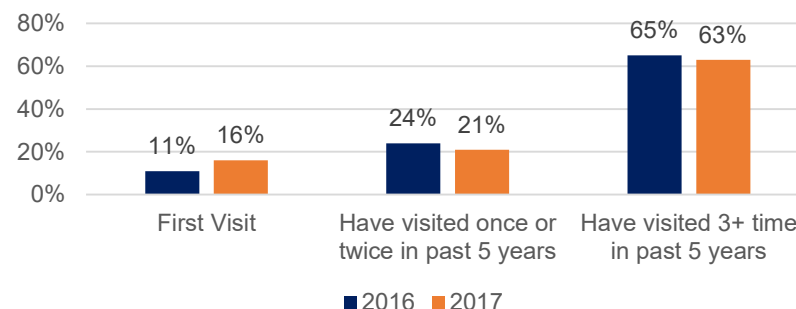
Tourist Attractions in North Carolina



Mountain Region Trends

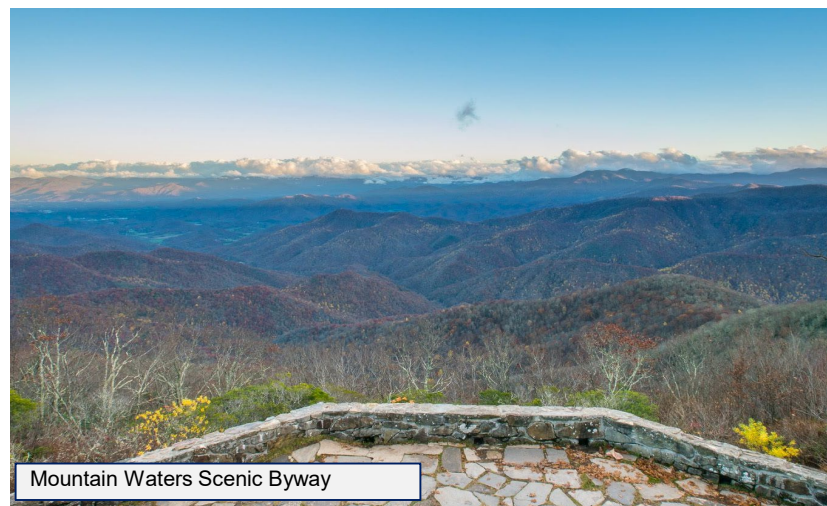
- Home to the Blue Ridge Mountains, contains three national forests (Cherokee, Pisgah and Nantahala) as well as the growing communities of Asheville, Boone and Hendersonville.
- **29% of North Carolina visitors traveled to the mountain region**, making approximately 13.3 million person-trips. 92% of travelers came for leisure purposes and 6% came to conduct business.
- On average, they **spent 3.4 nights in the region**, with **93% of visitors traveling by vehicle** and **6% traveling by air**.
- The top three activities were **shopping, rural sightseeing and visiting relatives**.
- It boasts plenty of **outdoor recreation activities** such as hiking, mountain biking and rock climbing to name a few. The region is also rich in **cultural arts** such as music and visual arts.
- Visitors typically come during the **spring and summer months**, though peak fall travelers come to enjoy the fall foliage towards the end of October.
- Travel within the region is typically done along winding mountainous roadways which are prone to **rock slides and winter storms** that can cause additional maintenance needs. Roadway damage can also cause very long delays as detours can add several hours to trips along indirect routes.

2017 First Time vs. Repeat Visitors to North Carolina's Mountain Region



The majority of overnight visitors to the Mountain Region are repeat visitors.

Source: 2017 North Carolina Regional Travel Summary, VisitNC

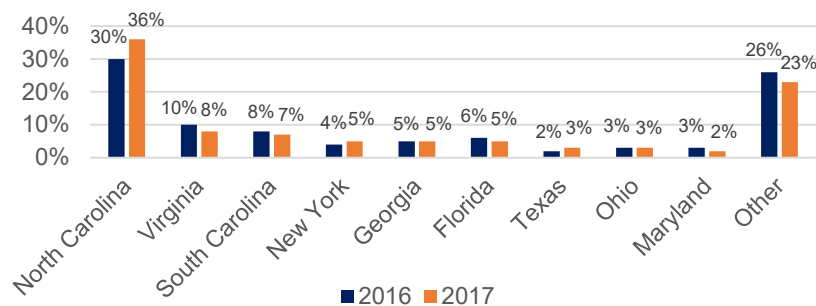


Mountain Waters Scenic Byway

Piedmont Region Trends

- Includes the **state's two largest urban centers**, Charlotte and the capital city Raleigh, as well as the booming I-85 crescent between the two urban centers.
- 68% of North Carolina visitors traveled to this region, making approximately **31.5 million person-trips**.
- 83% of visitors came for **leisure purposes** and 13% came to conduct business.
- Travel to this region is more **consistent through the seasons**, as is congestion around the urban centers.
- **81% of visitors traveled by vehicle**, while 15% traveled by air. This increase in air travelers from other regions is due to the Charlotte and Raleigh airports, which continue to expand and act as gateways into Southeast United States region.
- Visitors to the Piedmont region can also **travel more conveniently by train and light rail** than in other regions.
- Overnight visitors on average **spent 3.3 nights** and their top three activities were visiting relatives, shopping and visiting friends.
- Has many museums, tourist attractions, universities, convention centers and sporting events to enjoy. This region greatly benefits from a **wide range of activities** while being centrally located between the beaches and mountains.
- The **population in this region is also growing rapidly**, which will continue to add congestion and affects tourist perceptions.

2017 Top States of Origin of Overnight Visitors to North Carolina's Piedmont Region



The majority of overnight visitors to Piedmont region are current residents.

Source: 2017 North Carolina Regional Travel Summary, VisitNC

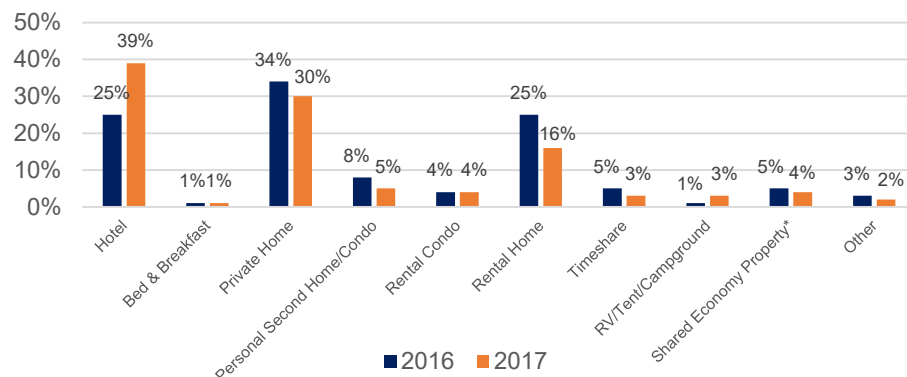


Downtown Raleigh, N.C.

Coastal Region Trends

- North Carolina's beautiful, 322-mile-long coastline attracted **over 10 million beachgoers** in 2017.
- With stunning beaches, vibrant urban communities and rich history, this region draws **23% of all state visitors**.
- Top 3 activities for travelers include going to the **beach, shopping and visiting relatives**.
- With the focus on the beaches, **summer is the most popular season** for travelers.
- Overnight visitors spend an average of **4.2 nights per trip**.
- Because of the high percentage of visitors during the summer, congestion during those busy months can cause long delays for visitors and residents as **91% of visitors drive to the coast**.
- Destinations along the coastal region experience significant traffic as travelers have **limited access via bridges and highways**, and pre-reserved ferries have limited capacity.
- **Ferries**, providing both transportation services and serving as a popular attraction for riders, are the only connection to several North Carolina islands.
- **Extreme weather** can cause serious issues for the region, as hurricanes and flooding can devastate coastal communities and result in significant economic impacts.

2017 Lodging by Overnight Visitors to North Carolina's Coastal Region



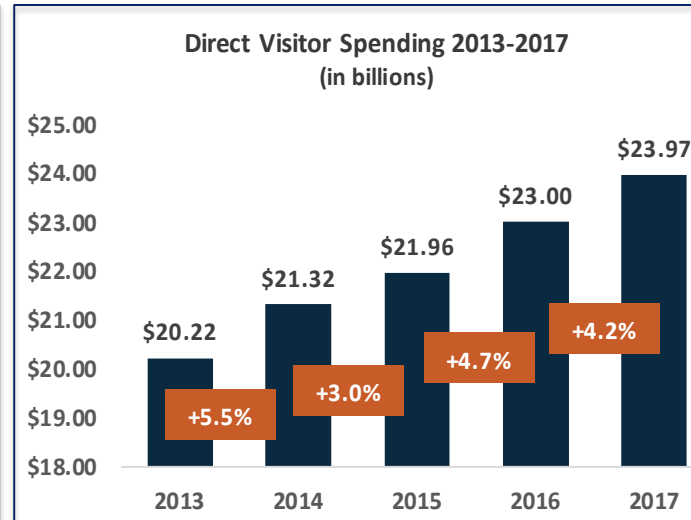
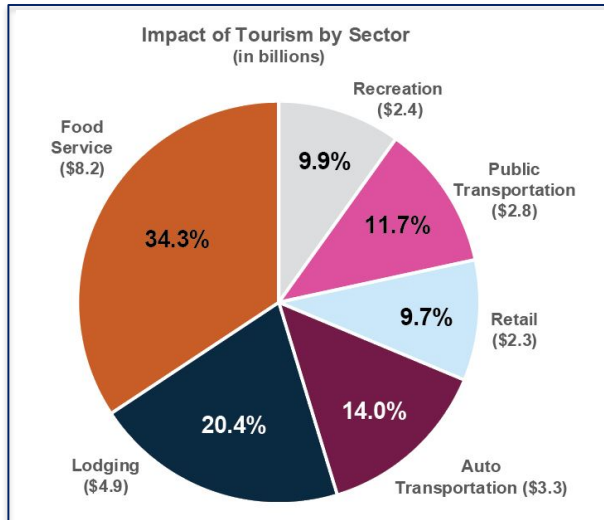
The majority of overnight visitors to the Coastal Region stay in hotels, private homes or rental homes.

Source: 2017 North Carolina Regional Travel Summary, VisitNC



HWY 70 in New Bern, N.C.

Economic Development



\$65 million

Visitor spending per day

\$5.4 million

Visitor related taxes generated per day

\$512

Annual household tax savings

1/50

NC residents directly employed by tourism

Source: VisitNC 2017 Economic Impact Study

The travel and tourism industry is steadily growing and is an important part of North Carolina's economy.⁶

- In 2017, **direct visitor spending reached \$23.97 billion which supported 225,170 jobs in direct tourism employment.**
- All **100 counties in North Carolina have residents who are employed by the tourism industry**, the top three counties are Mecklenburg (52,000), Wake (23,000) and Guilford (13,000) counties. These are jobs in hotels, restaurants, sporting venues, retail, recreational, event centers and more. The travel and tourism industry is even growing in counties where other industries aren't doing well, such as rural counties that are challenged to attract new industry and grow their economic base.
- The tourism industry also **impacts several sectors of the economy** in visitor spending, as shown in the pie chart above.
- Some examples of **transportation investment that serves the tourism industry** include greenways and bikeways, the NC-By-Train run by the NCDOT rail division, light rail and bus services in urban areas, ferry service provided by NCDOT and well-maintained highways and bridges.

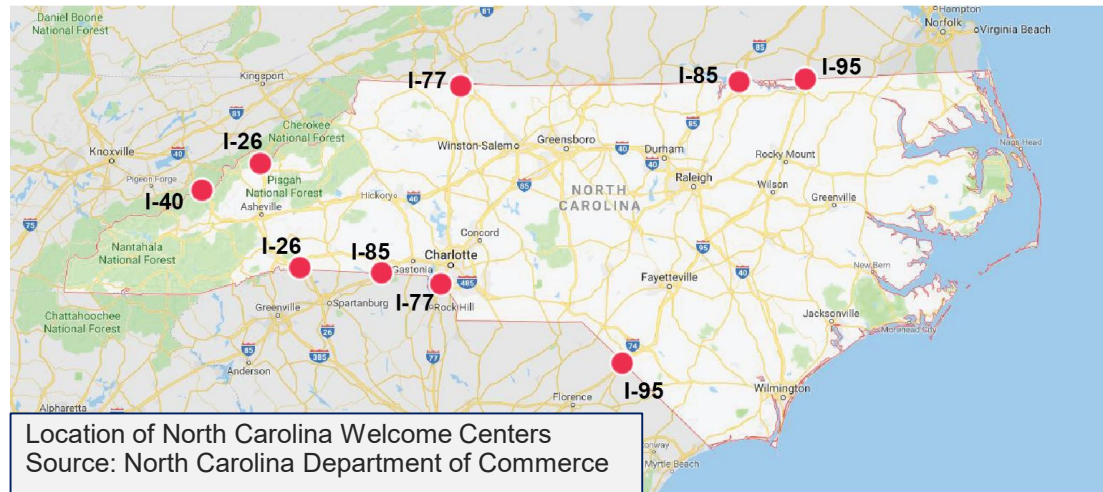
Legislation, Programs and Initiatives Influencing Tourism

North Carolina has legislation, programs and initiatives that influence tourism.

- The **School Calendar Law** enforces that school start dates cannot begin earlier than the Monday closest to August 26th and end no later than the Friday closest to June 11. This effects the tourism industry who rely on high school aged employees to work during the summer peak hours, and allows for families with school-aged children to vacation during summer break.⁷
- **Occupancy Tax Revenues** that are collected from room rentals, lodging and other hotel-like accommodations are allocated into destination promotion, tourism-related expenditures, tourism-related capital projects, beach nourishment or general fund revenue. In North Carolina, there are 145 counties and municipalities that collect occupancy tax that dedicate some or all of the revenue to the tourism industry.⁸
- North Carolina has nine **Welcome Centers** located on interstate highways just inside the state line to provide information to visitors already in the state actively seeking travel information. They promote thousands of tourism-related business – attractions, accommodations, events and more. Each center has a statewide focus with an emphasis on information within a particular interstate corridor. Travel counselors are located at each Welcome Center to distribute travel guides and state maps, offer travel information and help book room reservations at no charge.⁹



North Carolina Welcome Center - I-95 south at VA Border



Location of North Carolina Welcome Centers
Source: North Carolina Department of Commerce

Legislation, Programs and Initiatives Influencing Tourism

- NCDOT has several initiatives that support litter management, including **litter sweeps** where volunteers and NCDOT maintenance crews during April and September collect litter on roadways; **Adopt-A-Highway** and **Sponsor-A-Highway** programs in which organizations, businesses or individuals can volunteer time towards or sponsor litter removal; and the **Swat-A-Litterbug** program which encourages the public to report people who litter to help make North Carolina roadways cleaner. This is important to keep North Carolina roads beautiful so that people have a positive vision of traveling in the state.¹⁰
- The **Wildflower Program** began in 1985 as part of highway beautification and has become one of North Carolina's most distinguished features. Wildflower beds are planted and maintained across the state in the 14 highway divisions by Roadside Environmental personnel. Since most visitors to the state arrive by vehicle, the Wildflower program plays an important role in ensuring North Carolina is an appealing destination. NCDOT receives hundreds of comments of praise each year from residents and visitors on the roadside flower beds.¹¹
- NCDOT has designated 60 **Scenic Byways** that give residents and visitors a chance to experience North Carolina history, geography and breathtaking scenery. These byways also raise awareness for the protection and preservation of these state treasures. These safe and interesting routes provide alternatives to the faster-pace and commercial areas along North Carolina's major highways and interstates.¹²



I-77 in Iredell County



Litter Pick-up in Durham, N.C.

Strengths of the Tourism Industry

- Tourism is supported by **abundant natural resources, vibrant urban areas**, booming industry
- Industry's willingness to work together and a comprehensive state-run transportation system provides reliable and well-connected services.
- The **beaches and mountains are the most identifiable** North Carolina destinations for visitors, but urban areas such as **Charlotte and the Triangle are also prominent destinations** for business and leisure.
- As the state's population grows and relocation of residents to the Southeast region continues, North Carolina will see tourism grow as **two of the top activities are 'visiting relatives' and 'visiting friends'**.¹³
- Top activities for visitors include a wealth of **historic sites, state parks, museums and restaurants** across the state.

- The **interstate system is the backbone to regional connectivity** allowing movement between regions and to other states, so maintaining the performance of this system helps create repeat visitations.¹⁴
- The **ferry system is an essential coastal travel mode** as well as a unique travel experience and a great way to enjoy the natural beauty of the state's coastline.
- The **train system** is also a great travel resource and provides connection throughout the state's Piedmont region.
- North Carolina's **airports play a huge role in the travel industry**, not only delivering important services domestically but also providing direct connections for international visitors. While highways connect the majority of visitors to North Carolina, the state's airports have been a major catalyst for a growing economy, which is synonymous to growth as a state travel destination.

Top 15 Activities Participated in by Overnight Visitors to North Carolina*

Activity	2016	2017
Visiting Relatives	31%	31%
Shopping	27%	26%
Visiting Friends	17%	15%
Beach	14%	15%
Rural Sightseeing	12%	15%
Fine Dining	14%	13%
Historic Sites/Churches	10%	11%
State Park / Monuments	8%	10%
Museums	7%	9%
Urban Sightseeing	9%	8%
Hiking/Backpacking	6%	7%
Wildlife Viewing	6%	7%
Craft Breweries	6%	6%
National Park	4%	6%
Gardens	3%	5%

*Full list includes 54 activities. Source: 2017 North Carolina Travel Summary, VisitNC

Challenges for the Travel Industry

While the tourism industry is very strong, there are several challenges to be addressed.

- Most importantly is the **congestion in urban areas** which is expected to become an even greater challenge with forecasted growth in population and employment. Managing this congestion and finding ways to relieve it is important as the state considers the investments needed for the highways and urban corridors.¹⁵
- North Carolina was **once known as the "Good Roads State"** in the early 20th century, but no longer holds that distinction with residents and visitors alike due to poor road conditions.¹⁶
- **Lack of funding for marketing and promotional services** has been identified as a weakness by tourism-related organizations.¹⁷
- **Other states outspend North Carolina** considerably in marketing services which influences the number of visitors each year. For example, South Carolina spends twice as much as North Carolina.¹⁸



A aerial view of Hatteras' evacuation. NC 12

Travelers along coastal route experience long delays during peak hours without alternative routes.

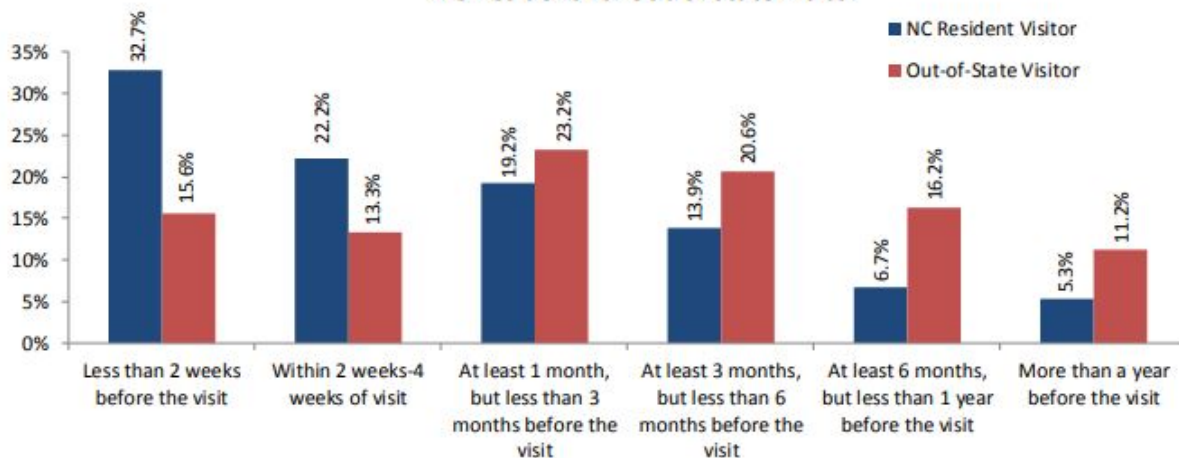
- There is also a **lack of advertising for NCDOT services** such as the ferry and train services, which if better promoted could increase ridership and revenues.¹⁹
- The formula for **funding welcome and visitors' centers** is challenging as all centers receive the same amount of money regardless of how many visitors use the center. This causes a funding structure in where heavily used centers are underfunded and unable to provide adequate frontline services.²⁰
- Adding **bicycle and pedestrian infrastructure** is important to provide first and last-mile connections between transportation services and offer recreation attractions for tourists.
- **Extreme weather** is an issue for North Carolina, with rock slides and hurricanes. Being prepared for events to keep services reliable and reacting in a timely manner is important to minimize delays for visitors and residents.

WHERE WE ARE GOING

Influence of Technology on Visitor Travel

- Traditional means for planning trips has evolved and **travelers are more informed** on popular destinations, travel conditions, conveniences and options. Technology is replacing printed maps, travel agencies and booking agencies, forcing the tourism industry to change how they market to visitors.²¹
- Technology **shortens the booking window and causes unpredictability in demand patterns**. Visitors can book trips the night before or extend their trip instantly causing increased demand and giving communities less time to prepare for a flux of visitors.
- The emergence of app-based ride-hailing and ride-sharing services such as Uber and Lyft are **enhancing local mobility and last-mile connections for visitors**. These services provide reliable transportation between destinations such as airports or train stations to downtowns or tourist attractions. They also provide conveniences for travelers unfamiliar with local public transit and are an alternative to renting a car.
- Shared mobility services such as e-bikes and e-scooters **give options to visitors traveling locally** without a car or public transit and provide a recreational activity. However, these services can **cause issues for municipalities** addressing challenges of bikes and scooters blocking sidewalks and causing safety issues. These services have shown up in cities overnight, leaving cities unprepared to deal with unplanned consequences. While these technologies provide more last-mile connections and give travelers more convenience, the services need to be planned for and utilized in a safe and regulated manner.²²

**2017 How Far in Advance Overnight Visitors Consider Travel to North Carolina
NC Resident Vs. Out-of-State Visitor**

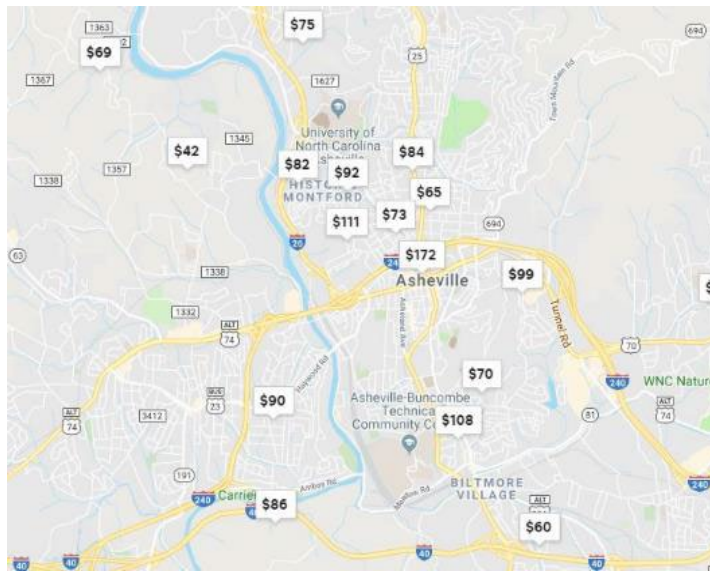


Residents of North Carolina are twice as likely to consider traveling somewhere in the state less than two weeks before their trip than out-of-state visitors. These out-of-state visitors are more likely to consider traveling to the state at least one month prior to their visit, and more than twice as likely to consider traveling more than six months in advance.

VisitNC 2017 North Carolina Visitor Profile

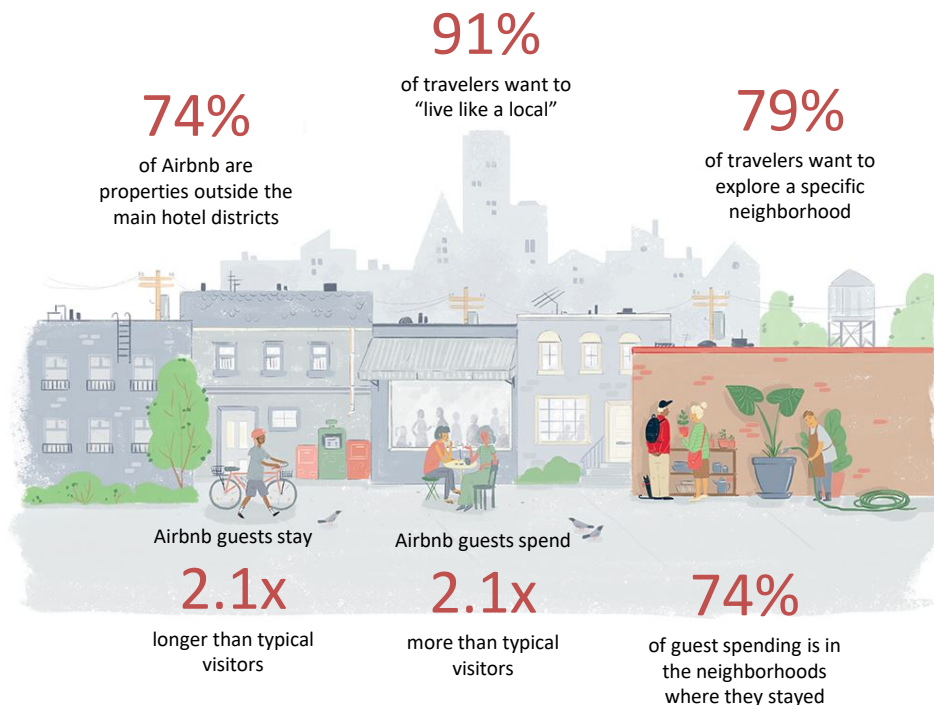
Impact of Shared Economy

According to tourism officials the **growing popularity of shared properties has not had a marked impact on the industry as hotel accommodations are the first choice of visitors.**²³ In 2017, only 4% of North Carolina visitors stayed at shared economy properties.²⁴ This percentage does not include rental homes or bed and breakfast accommodations. However, shared economy properties have caused issues at the local level with concerns over **short-term rentals increasing traffic and noise in neighborhoods**, as well as take away affordable long-term living spaces. This logic has caused the City of Raleigh to place an un-enforced ban on Airbnb and the City of Asheville to place **strict regulations on rentals** by requiring city permits that are given by special permission from the City Council.²⁵ Airbnb has done studies that show that 74% of their properties are outside the main hotel districts and that 79% of travelers want to explore a specific neighborhood.²⁶



Above: AirBNB properties in Asheville on a weekday, NC, Source: Airbnb

Right: Economic impacts of Airbnb properties on neighborhoods, source: Airbnb



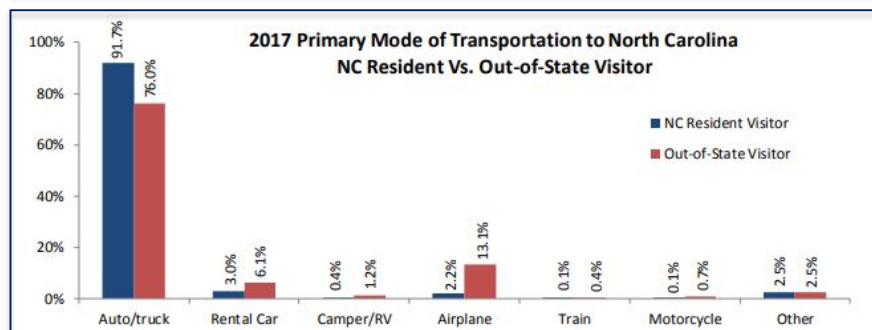
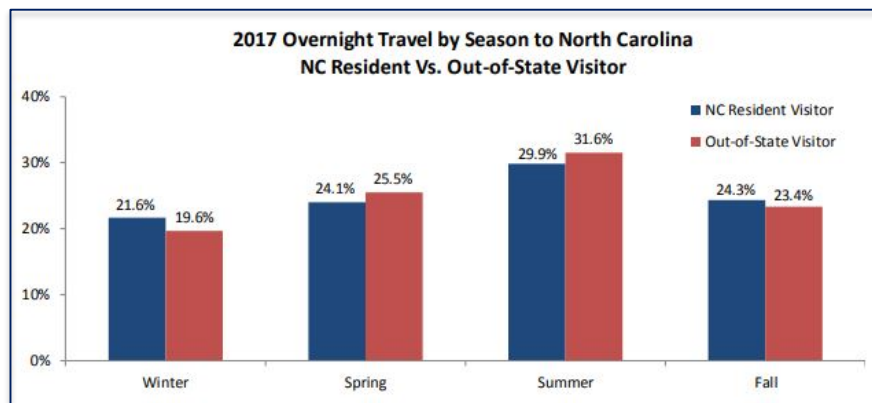
Seasonal Demand

Congestion trends are a major concern to the travel industry, as **90 percent of visitors travel to North Carolina by car** and visitors can be discouraged to return to the state if they encounter heavy congestion.

- Seasonal demand during peak-hour travel can **cause long back-ups** especially in urban areas where seasonal traffic competes with rush-hour traffic or in places with limited highway networks, such as coastal areas.
- Concerns about increased congestion could **create a negative perception** for certain North Carolina cities or destination areas.

Example in Innovation

Technology has played a role in finding solutions to congestion through innovation. During peak summer demand, rental homes on the coast were traditionally rented for a full week starting on the same day. Rental keys were picked up at a single location causing significant congestion as renters arrived at the same and again when they left. This congestion was reduced using coded or digital locks on rental properties as well as online booking sites allowing rental periods to be staggered throughout the week. Due to these technological conveniences visitors can enjoy their stay more and are likely to make return trips.²⁷



Peak overnight travel is highest during the summer months, for both residents and out-of-state visitors. Resident travelers are more likely to travel in the winter season than out-of-state travelers.

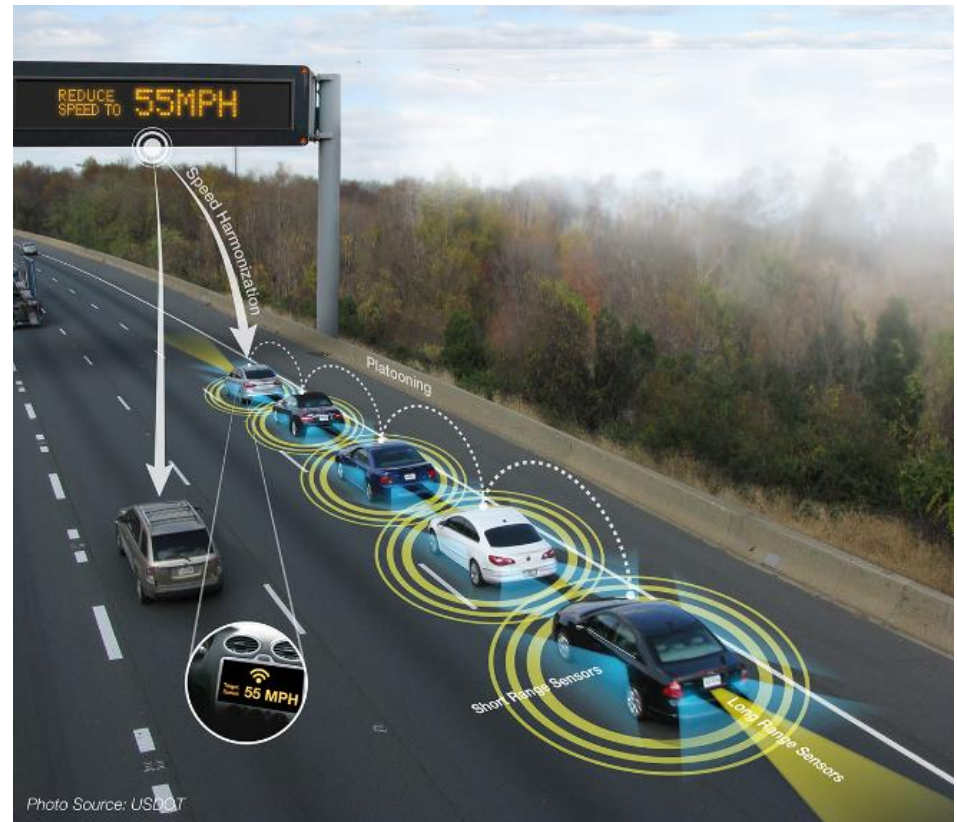
Resident and out-of-state visitors are more likely to use their own vehicle to reach North Carolina

Source: 2017 North Carolina Visitor Profile, VisitNC

Connected/Autonomous Vehicles

The emergence of connected and autonomous vehicle technology in the future promises to further enhance the safety and efficiency of highway travel to and within the state, helping to better promote tourism to North Carolina and addressing major concerns.

- Tourism agencies like VisitNC market to 10 southeastern states surrounding North Carolina to target potential visitors. According to VisitNC, visitors are only willing to drive for 1-2 hours per 1 hour of entertainment. With connected/autonomous vehicles, **visitors may be willing to travel from further distances**, meaning that a wider target area can be marketed to.²⁸
- This technology may also **appeal to people with disabilities** previously unable to travel, allowing them now to do so, further increasing the annual number of tourists.
- The technology of autonomous vehicles promises to **allow for a higher capacity on roadways** as the vehicles can communicate between each other and drive closer together, reducing delays from congestion which is a major concern for the tourism industry.



Connected and Autonomous vehicles can utilize technology that allow vehicles to communicate to each other, but also to communicate with sensors or signals along the road, which allows them to follow traffic rules and drive closer together. It is believed that this will lead to less congestion on road ways, safer driving and encourage people to drive further distances. Source: USDOT

FINDINGS AND FUTURE DIRECTION FOR NORTH CAROLINA

Travel and Tourism Vision



RDU airport corporate apron



Orange County

Collectively subject matter experts offer perspective for a future transportation system in North Carolina that positions the tourism industry for sustained growth and competitive advantages:

- A long-term view of what United States and North Carolina travelers will come to expect from a multimodal transportation network exists today in Europe.
- North Carolina is a wide state (500+ miles east to west) so a future vision must be strategic regarding access and connectivity to destinations. It's quicker to travel from Charlotte to South Carolina beaches than to North Carolina beaches.
- It should be a priority to reclaim North Carolina's identity as the "Good Roads State."
- Close the gaps in modal connectivity (airport to train to bus to sidewalks and greenways).
- Airports are gateways to growing the state's economy.
- System resilience is especially relevant to tourism as a result of past weather events, climate and terrain.

Collaboration and Coordination

Options to explore enhanced collaboration and coordination between the tourism industry and transportation providers:

- Re-establish a version of the Interagency Tourism Council to better facilitate the sharing of information.
- Define mechanisms for industry input in the transportation planning process.
- Input from MPOs and RPOs about tourism industry representation in the local planning process.
- Future research pursuits and peer exchanges to learn from other communities about transportation and tourism coordination (e.g. Orlando, Florida).



Southport to Ft. Fisher Ferry



Forest Heritage Scenic Byway, Brevard N.C.

Conclusion

- North Carolina's growing tourism industry is inherently dependent on the state's multimodal transportation system, which delivers visitors to destinations across the state.
- Technology will continue to support the tourism industry and may help provide solutions to relieving congestion and support additional economic benefit.
- NCDOT has several tourism related programs and enhanced support for the tourism industry can come from stronger partnerships between NCDOT and tourism organizations.
- Providing a vision for future transportation that is inclusive of tourism can foster unified policies and objectives that best serve the needs of the state.

APPENDIX

Subject Matter Expert Engaged

Subject Matter Experts engaged in the NC tourism industry offered insight into emerging issues, trends and relationship of travel and tourism:

- Wit Tuttell, Executive Director of VisitNC and Marlise Taylor, Director of Tourism Research for VisitNC. **VisitNC** is a private non-profit organization that contracts with the Department of Commerce through the Economic Development Partnership to lead tourism marketing efforts for the state.
- Mike Butts, Executive Director of **Visit Charlotte** responsible for promoting the Charlotte region as a destination for domestic and international visitors, a host city for meetings and conventions and a site for sporting events.
- Lynn Minges, Director of the **NC Restaurant and Lodging Association** representing 18,000 restaurants and 1,800 lodging establishments in the state.
- Kara Weishaar, Executive Director for the **NC Travel & Tourism Coalition** and Dana Simpson, Legislative Counsel for the NC Travel & Tourism Coalition. The NC Travel and Tourism Coalition provides direction on public policy benefits to the travel, tourism and hospitality industry in the state.

Endnotes

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Notable examples of transportation processes/programs influenced by tourism considerations

- Scenic Byway Program
- Adopt-A-Highway Program
- State Ferry System
- Identification of State Transportation Corridors
- Project prioritization Process
- Federal Lands Access Program
- Welcome Centers
- Wildflower Program
- Transportation Enhancement/Alternatives Program
- Recreational Trails Program
- Wayfinding Signage
- NC 511
- Travel demand modeling for tourist destination area (Asheville MPO)