

VISIT NC QUARTERLY UPDATE & EVOLUTION OF ALGORITHMIC MEDIA

Visit NC Monthly Partner Webinar

August 13, 2026

An aerial photograph of a golf course. In the center, a large, irregularly shaped pond reflects the sky and surrounding trees. To the left of the pond, a golf green is being watered by a large nozzle, creating a misty spray. A golf cart is parked on a path near the green. The course is surrounded by dense pine trees, and a few small houses are visible in the background. The overall scene is lush and green, with long shadows cast by the trees.

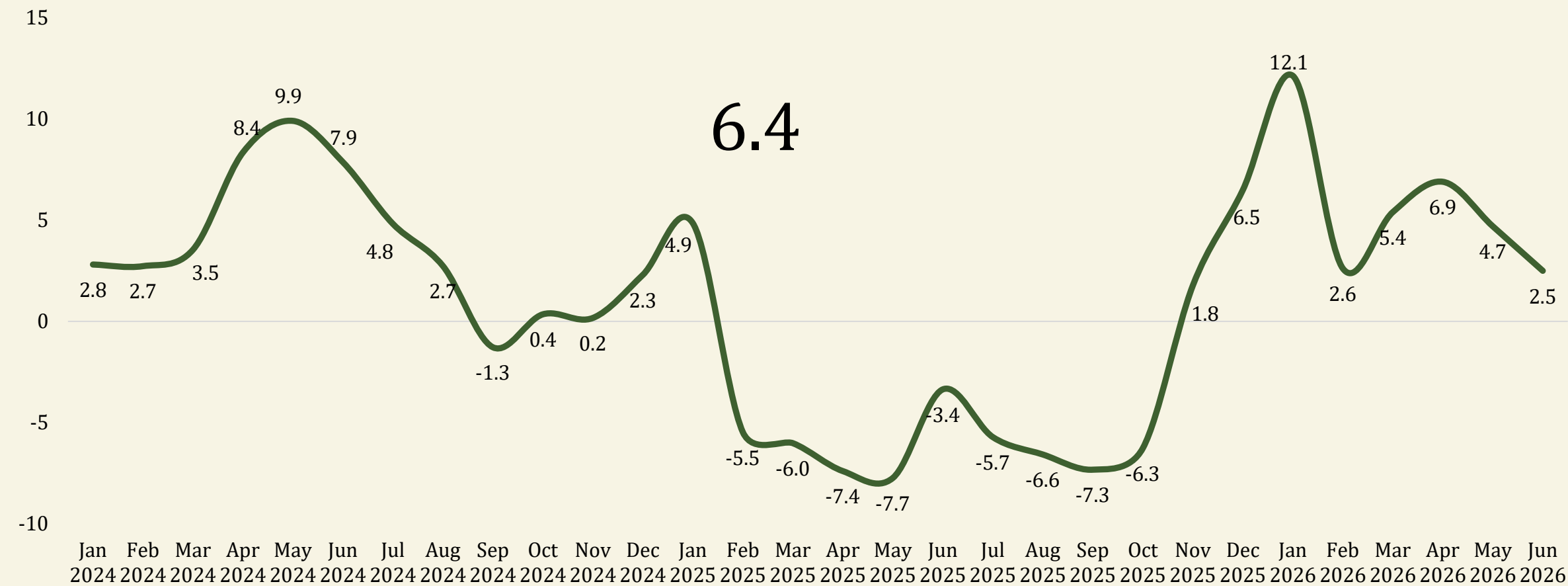
VISIT NC QUARTERLY UPDATE



2026 YTD TOURISM HEALTH STATUS



VISITOR ECONOMY INDEX - MONTHLY



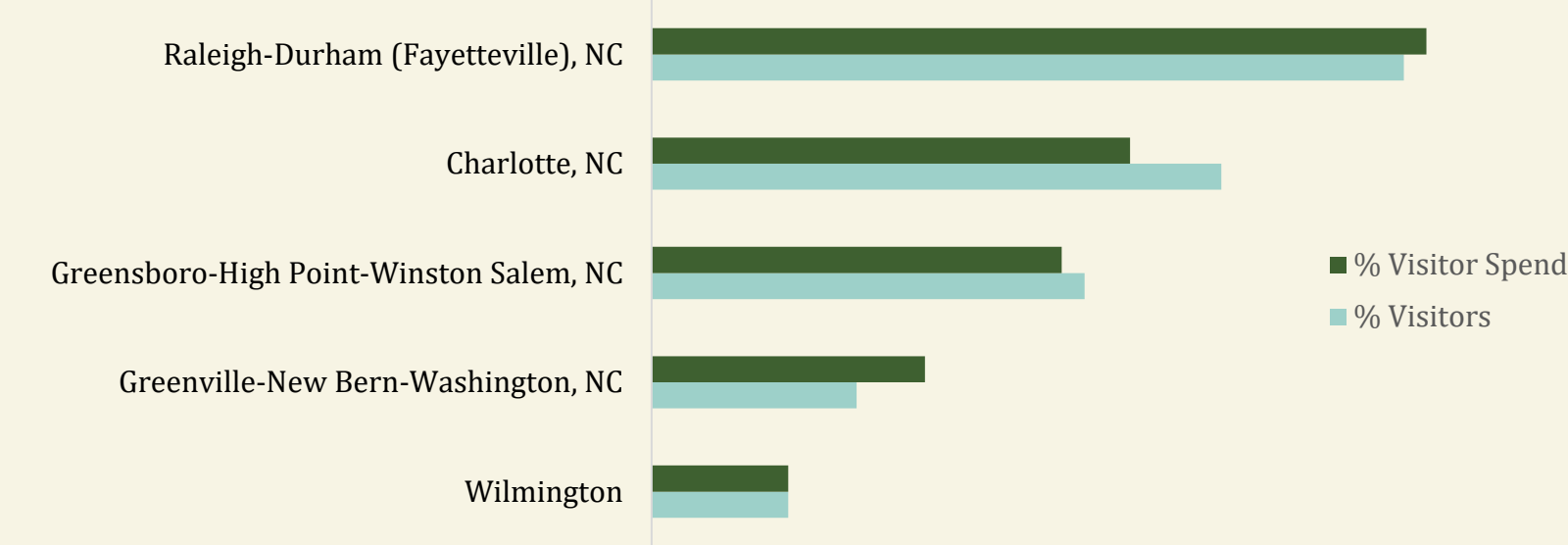
Visitor Economy Index is comprised of commercial lodging demand and revenues, AirDNA demand and revenues, available credit card data and visitor device counts

Source: Zartico 2026

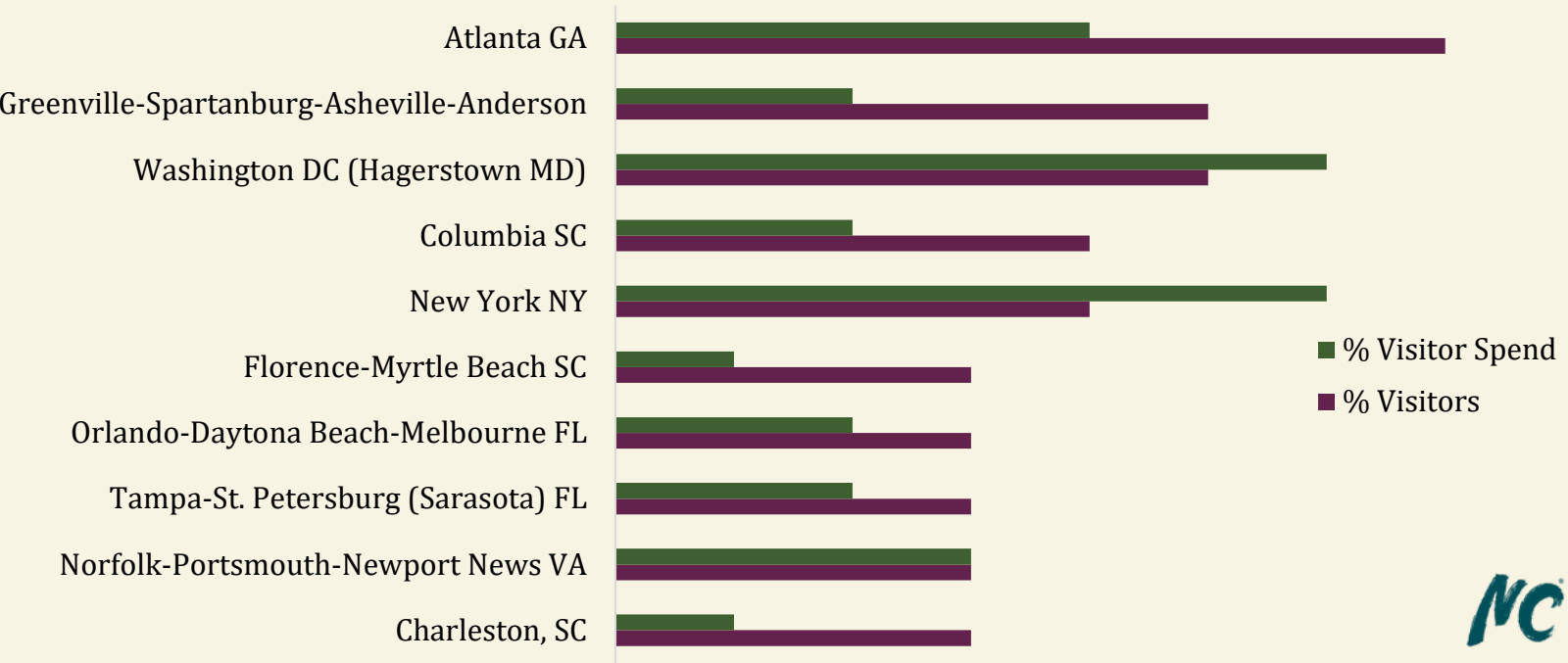




Top 5 In-State Origin & Spend Markets

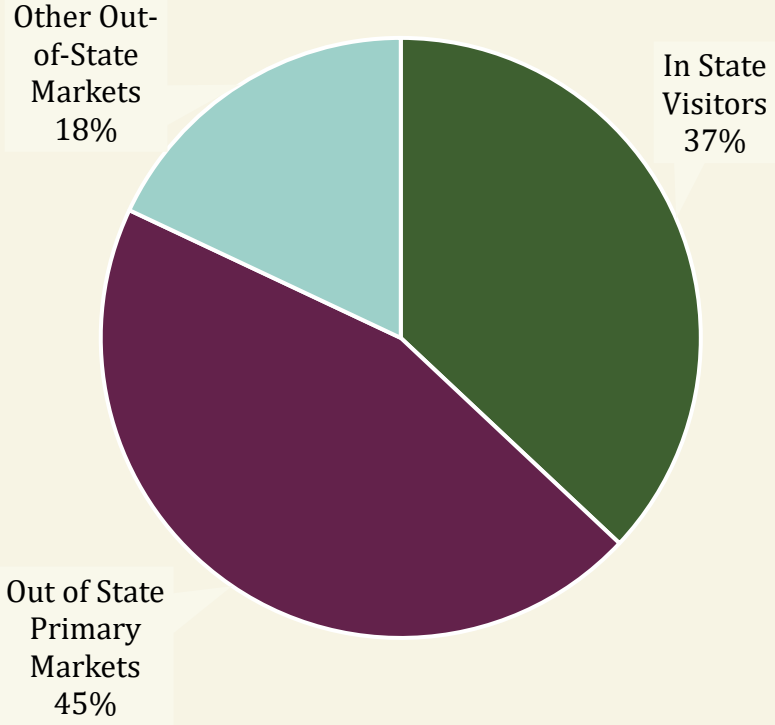


Top 10 Out-of-State Origin & Spend Markets



2026 VISITATION TRENDS

In-State vs. Out-of-State Visitors



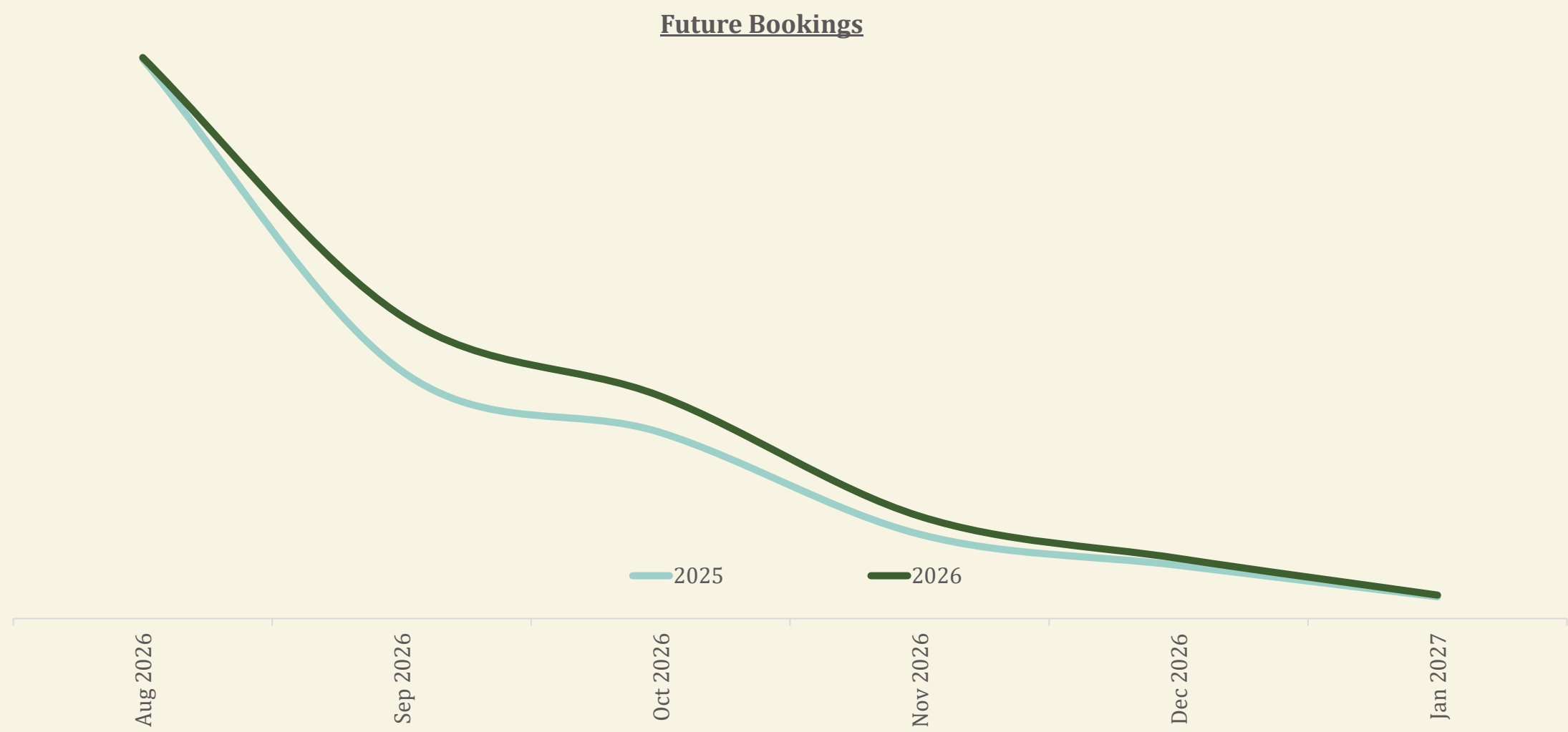


2026 YTD LODGING DATA (THROUGH JUNE)

Measurement	Commercial Lodging (CoStar)	Vacation Rentals (AirDNA)
Occupancy	Down 0.8%	Down 1.2%
Room Rates	Up 1.1%	Up 0.9%
RevPAR	Up 0.3%	Down 0.3%
Revenues	Up 0.8%	Up 1.5%
Demand	Down 0.3%	Up 0.9%
Supply	Up 0.5%	Up 2.9%



VACATION RENTALS



Source: AirDNA, 2026



US TRAVEL FORECAST

- Low, but positive spending growth projections
 - resilient domestic demand
- Travel continues to be a priority, but spending is being driven by higher income households
- Shorter duration and lower-cost trips are expected in response to greater travel expenses
- International recovery expected to be uneven across markets
- Business travel growth expected to be low in short term before improving in 2027 and beyond

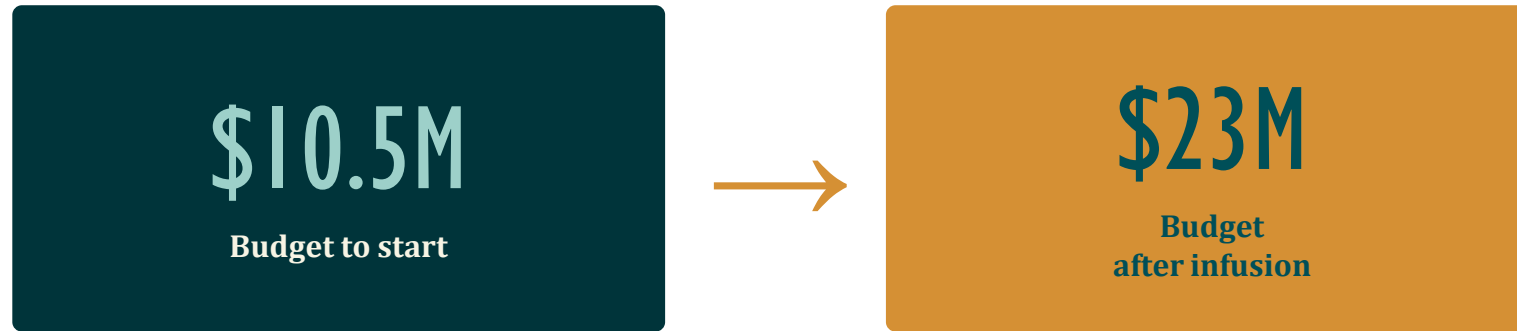


An aerial photograph of a coastal marsh. A dark, winding river or canal cuts through a vast area of green marsh grass. The marsh has several small, irregular ponds or oxbow lakes. In the upper left, there is a dense forest of tall trees. A small red boat is visible in the river, moving towards the bottom center. The overall scene is a mix of green, brown, and blue tones.

MARKETING UPDATE



FY26-27 BUDGET PLANNING PROCESS (WITH \$13 INCREMENTAL)



For our brand campaign, this incremental budget allows us to:

Fall 2026

- Increase weight and frequencies of existing plan

Winter 2026 / Spring 2027 / Summer 2027

- Add in new markets and explore audience opportunities
- Increase weight and frequencies of existing plan
- Layer in new, complimentary tactics across the full-funnel



OTHER AREAS OF FOCUS

The incremental budget also allows us to more robustly support other areas of our marketing plans.

- **Partner Program:** increase program inventory, explore efficiencies for ease of partner access to managing their programs
- **Non-brand campaign paid media partnerships**, such as Travel South domestic, NC Ski, NC Broadcasters Association, etc., and emerging media opportunities
- **Creative asset production**, affecting campaign development for 'For Real,' and photo/video library
- **Volume of content** produced internally and externally for Website, Email and Social channels
- Additional support for **personalization efforts** across Web and Email.
- **Creator partnerships** at an increased volume
- **Sponsored Content** back in brand paid media plan

UPDATED FALL CREATIVE

UPDATED FALL CREATIVE

Continuation of “For Real.”

Competitive (friendly) ads performed best, so leaning into this more.

So we will juxtapose North Carolina vacations and experiences with other vacation experiences.



MICROWAVE :15



PUBLIC RELATIONS





RESULTS YTD (THROUGH JUNE)

- Total PR Placements: 93 (+43.08%)
- Total Unique Reach: 2,961,049,670 (+2.83%)
- Individual Counties Covered: 35 (+52.17%)



RECENT FUNCTIONS



MAY

Summer Camp, Reimagined FAM

- Rutherford, Henderson, Transylvania, and Macon counties
- National Geographic, CNN Travel, SheBuys Travel, and House Beautiful

IPW, Fort Lauderdale

- 20 media marketplace appointments with international media from Australia, Canada, France, Ireland, the United Kingdom etc., and an invite-only press brunch

JUNE

Chicago Media Mission

- Buncombe, Cabarrus, Durham, New Hanover and Wake counties
- Nine media + Chef Oscar Diaz

PRSA, Albuquerque

- Buncombe, Cabarrus, Carteret, Dare, Durham, Mecklenburg, New Hanover, Wake and Watauga counties in attendance

JULY

Destinations International CDME

- Certified Destination Marketing Executive classes

UPCOMING FUNCTIONS



Veda Gilbert
Sr. Public Relations Manager
Visit North Carolina





✉ veda.gilbert@visitnc.com 919-606-0354

Aug 3, 2026 - Aug 7, 2026
Brand USA Aeroméxico FAM

- Brand USA Aeroméxico FAM (August 3-7)
- ESTO (August 22-26)
- Peaks & Pours FAM (September 14-18)
- SATW Pre-FAM (October 1-4)
- 2026 MICHELIN Guide Ceremony (October 21)



esto

Powered by U.S. Travel Association



Veda Gilbert
Sr. Public Relations Manager
Visit North Carolina





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Oct 1, 2026 - Oct 4, 2026
SATW Pre-Tour



REGIONAL MEDIA MISSIONS SCHEDULE 2026

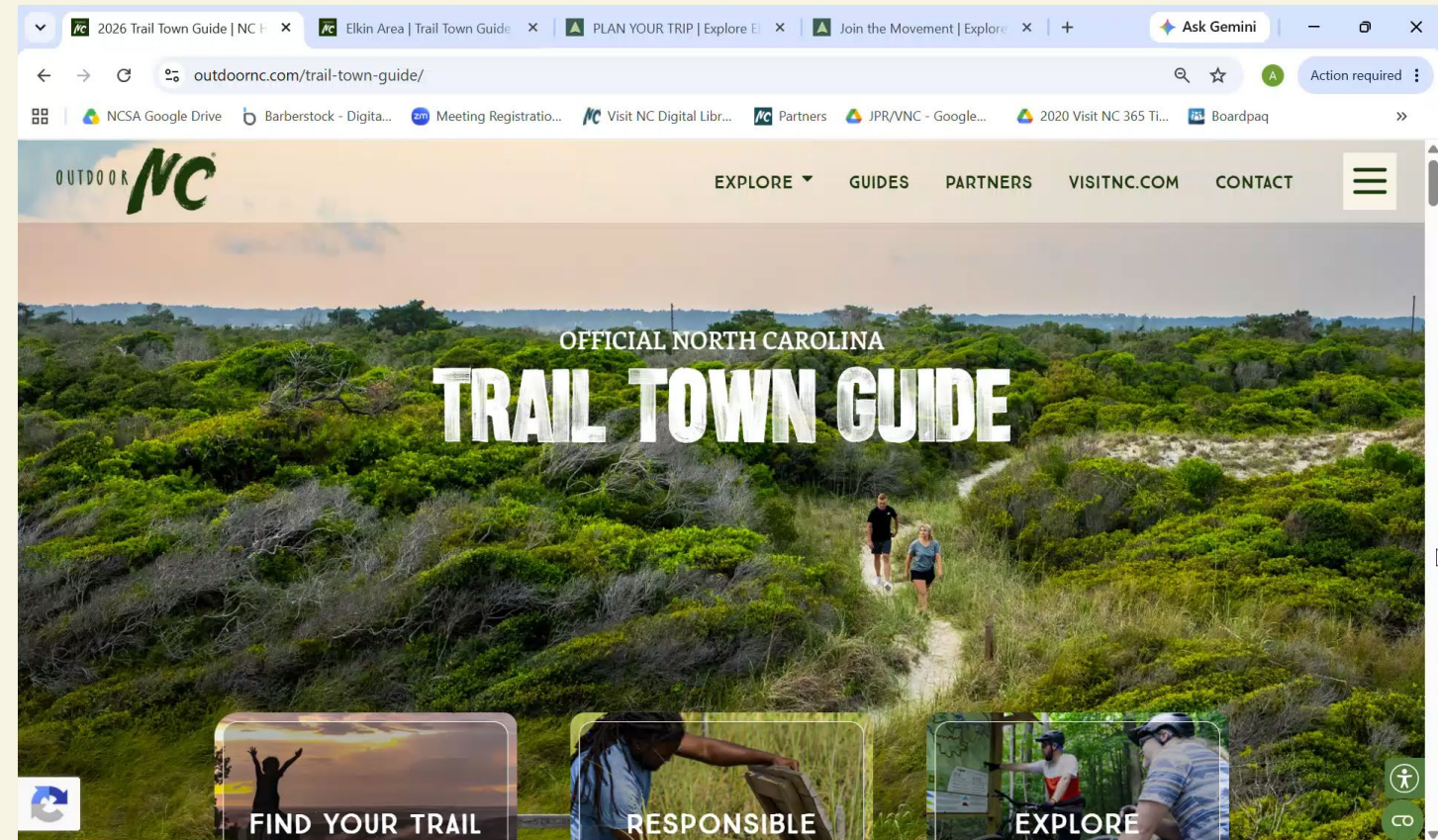


PARTNER & INDUSTRY RELATIONS



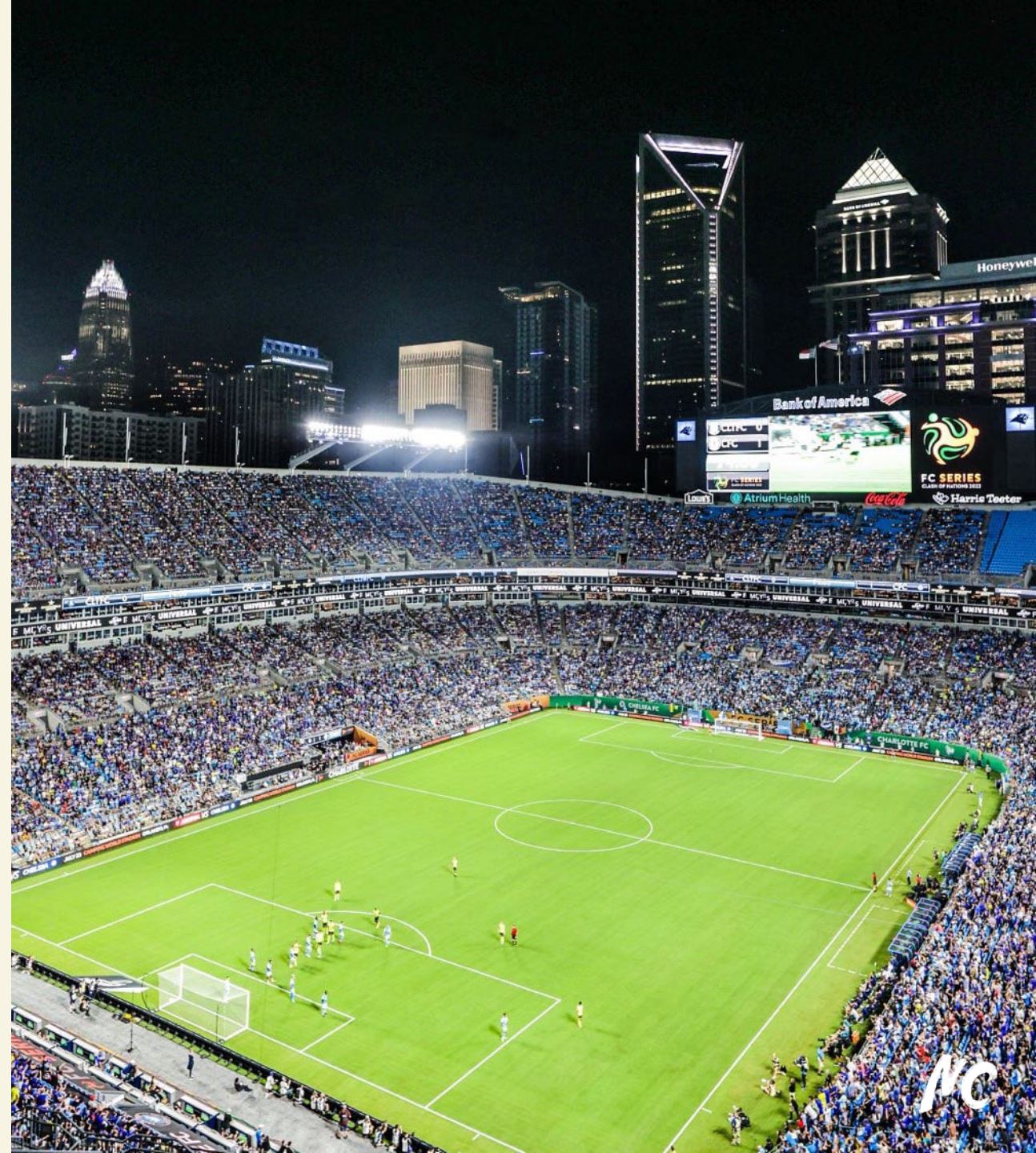
OUTDOOR NC

- The newly redesigned Outdoor NC Trail Town Guide launched in July.
- FY 26-27 Partner Alliance
- Outdoor NC and Great Trails State Coalition collaboration



SPORTSNC

- State budget eliminated the (funding for) North Carolina Esports Incentive.
- TEAMS Conference (October)
- Sports ETA's Relationship Conference (December)



RETIRE NC GUIDE

2026-27 Retire NC Guide is now available.

- Distributed through the Visit NC warehouses, Welcome Centers and Call Centers
- Available for download at RetireNC.com
- Features 15 partner communities
- Includes featured stories and retiree testimonials



INTERNATIONAL

Recent Events:

- IPW (Trade & Media)
- German event (Trade)
- Australia & New Zealand mission (Trade & Media)
- Travel South Global Partner Network kick-off calls
- Brand USA Aeroméxico FAM (Media)



Upcoming Events:

- August - Ireland event (Travel Trade Media & Trade)
- September - Brand USA Travel Week Europe (Trade & Media)
- November - Finland event (TBD)



DESTINATION IMMERSION

Q1 – Blowing Rock, March 26-26

Q2 – Dare County (Manteo-Hatteras), June 2-3

Q3 – Lexington, July 22-23

Q4 – Burke County, October 12-13



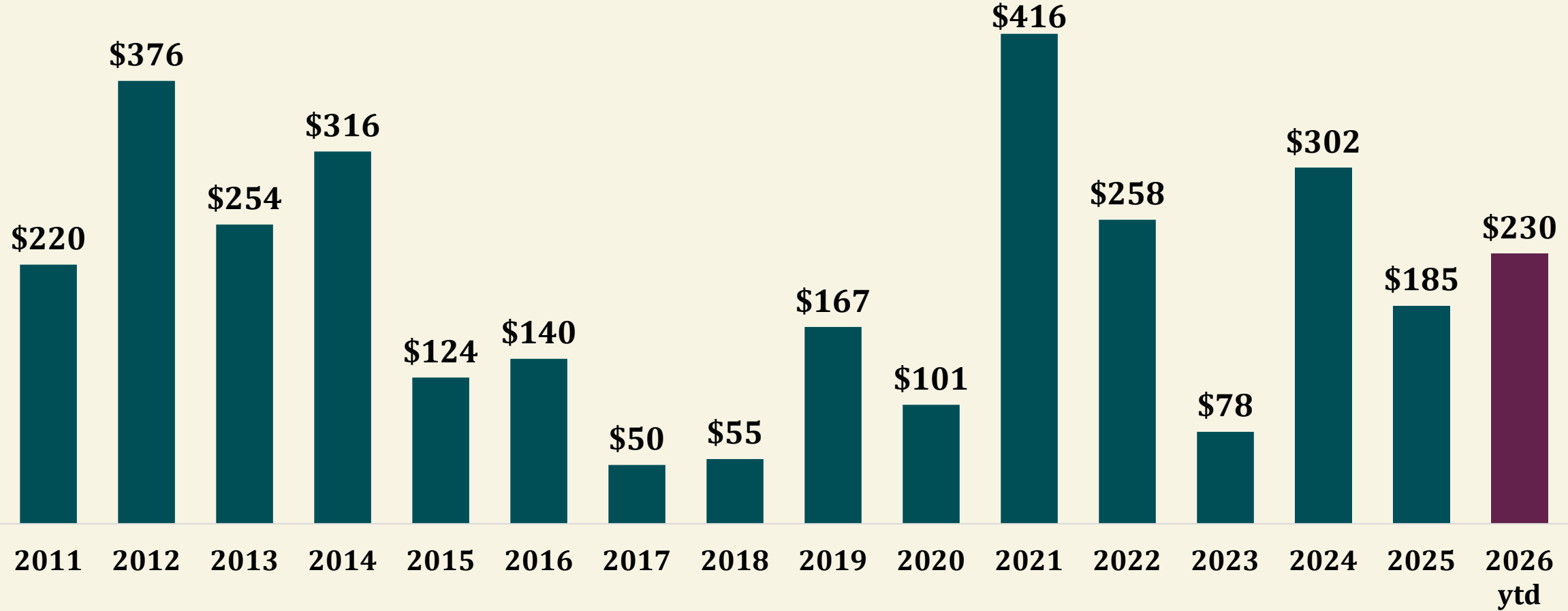
The group during a butterfly release at the Elizabethan Gardens in Manteo



FILM



DIRECT IN-STATE SPEND BY PRODUCTION (IN MILLIONS)



**As of 31 July 2026*

PROJECTS CURRENTLY IN PRODUCTION & NEW AWARD ANNOUNCEMENTS

RJ Decker – Season 2 *

Saltwater – Pilot *



Projects currently in production in WHITE * denotes Film Grant awardee

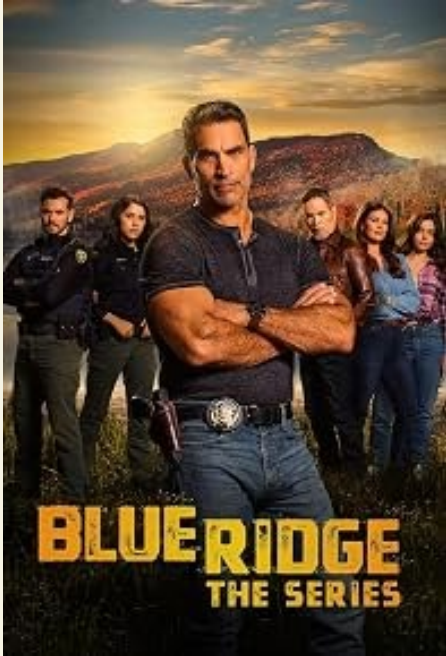
LEGISLATIVE CHANGES

SB 257

- Raise per project payouts for features (\$7M to \$20M) & series (\$15M to \$25M)
- Raise highly-compensated individual pay cap for rebate (\$1M to \$4M)
- Makes “game shows” eligible
- Creates “on-line” production eligibility
- Creates a micro-budget productions (\$50K-\$1.49M) grant
- Additional \$15M non-recurring funding into the account



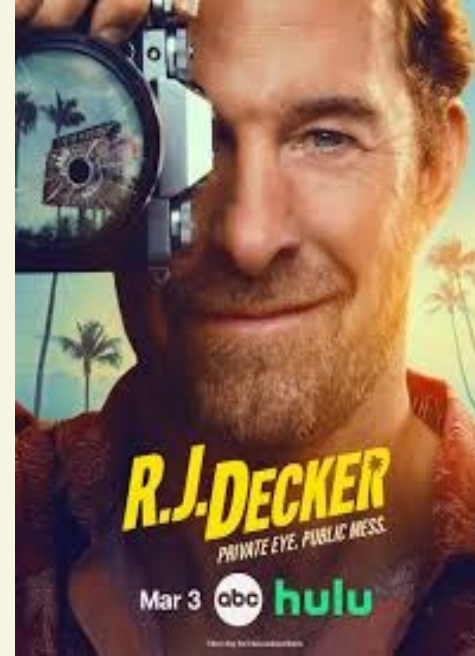
UPCOMING & RECENT RELEASES



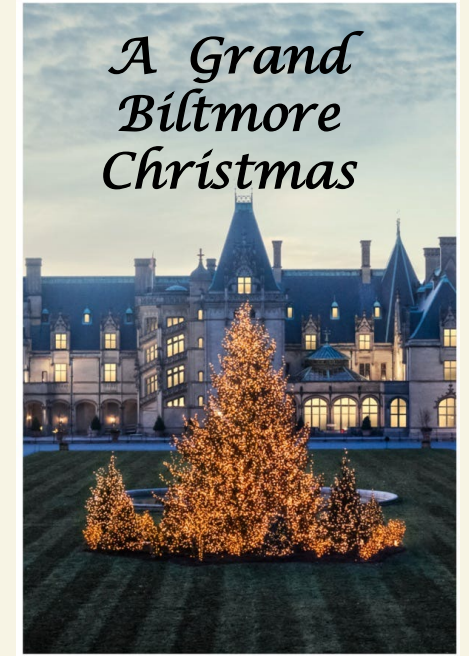
Season 2 – Sun at 10 pm
Started Jul 22 – INSP



Ltd Theatrical Release
July 22-27



Season 2 – Tues at 10 pm
Starting Sep 15 – ABC & Hulu



Hallmark Channel
Dec 5

RESEARCH DEEP DIVE

Next Visit NC Monthly Partner Webinar
September 10 , 2026 – 10 a.m.



EVOLUTION OF ALGORITHMIC MEDIA

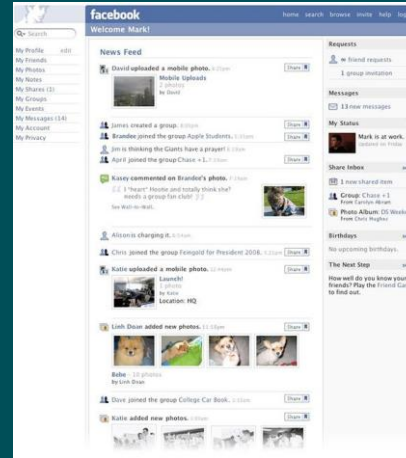
August 13, 2026

Visit North Carolina



A group of four friends are sitting at a wooden table on a rooftop bar. The scene is set during sunset, with warm golden light illuminating the scene. In the foreground, a man with a beard and a pink flower in his hair is looking towards the right, smiling. Next to him, a woman with curly hair is laughing, her hand resting on her chin. To her right, another woman with long blonde hair is also laughing. In the foreground left, a man with a beard and glasses is looking down. The table is set with various items including a glass of orange juice, a pitcher of water, and some bowls. In the background, a city skyline is visible under the sunset sky.

HOW DID WE GET HERE?



Mid-1990s–Early 2000s

Chatrooms and Forums

2009–2012

Algorithmic Feeds Emerge

2020–Present

Algorithmic Media

2004–2009

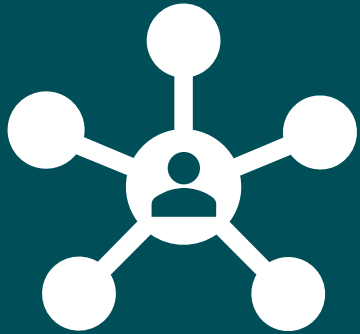
Social Networks

2016–2020

Interest-Based Discovery



THE CORE PRINCIPLES SHAPING THE USER EXPERIENCE HAVE CHANGED.



Networks and Community



Interest and Engagement



**Relevance, Performance
and AI**

WHAT IS ALGORITHMIC MEDIA?

Digital content that is organized, prioritized and distributed based on algorithms and signals vs. chronological order or social behaviors

STATE OF THE LANDSCAPE

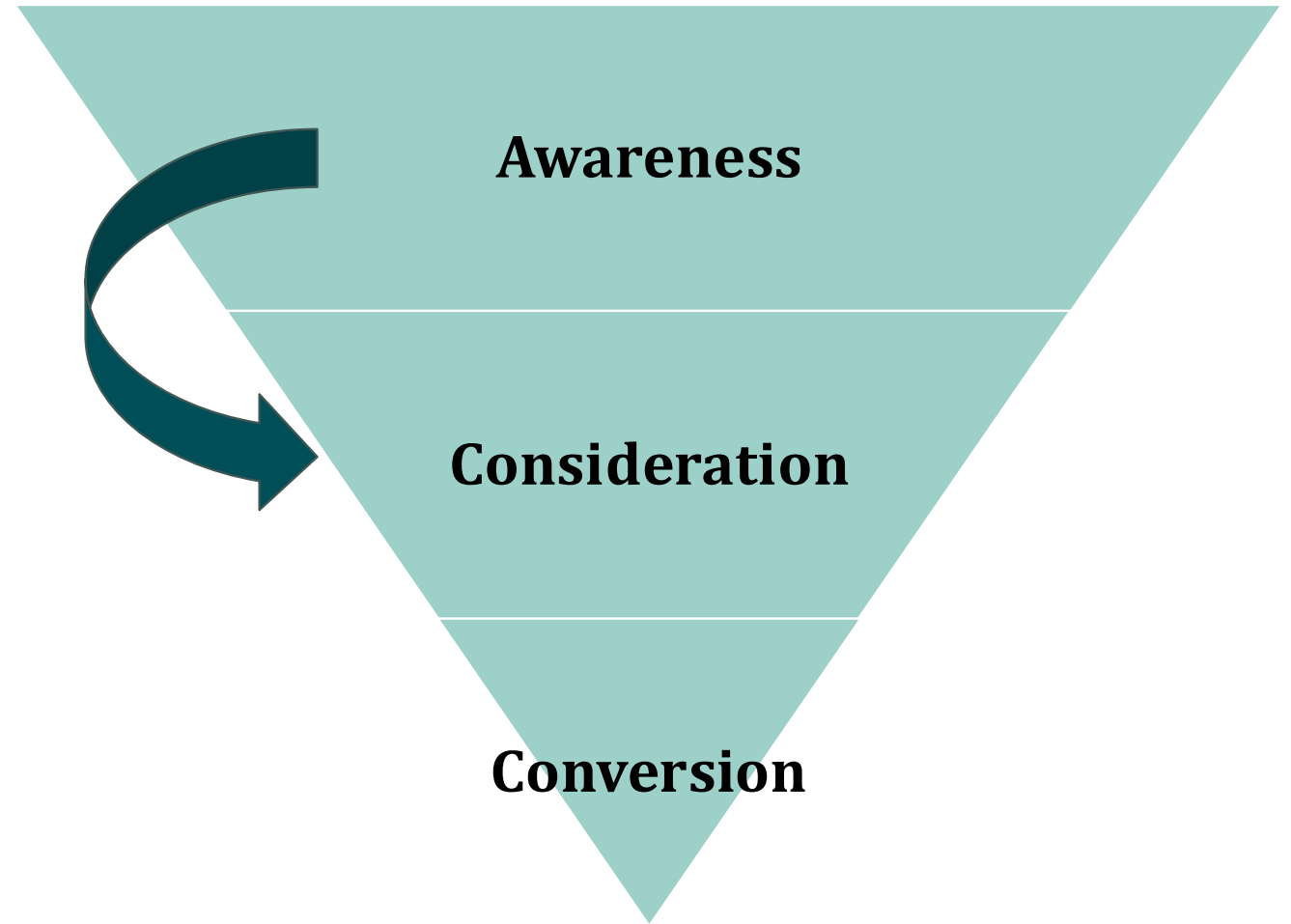


REACH USED TO RELY ON WHO FOLLOWS YOU.

NOW, IT RELIES ON THE VALUE OF THE CONTENT.

KEY GOAL

Speed up the move between awareness and consideration



DISCOVERABILITY FACTORS

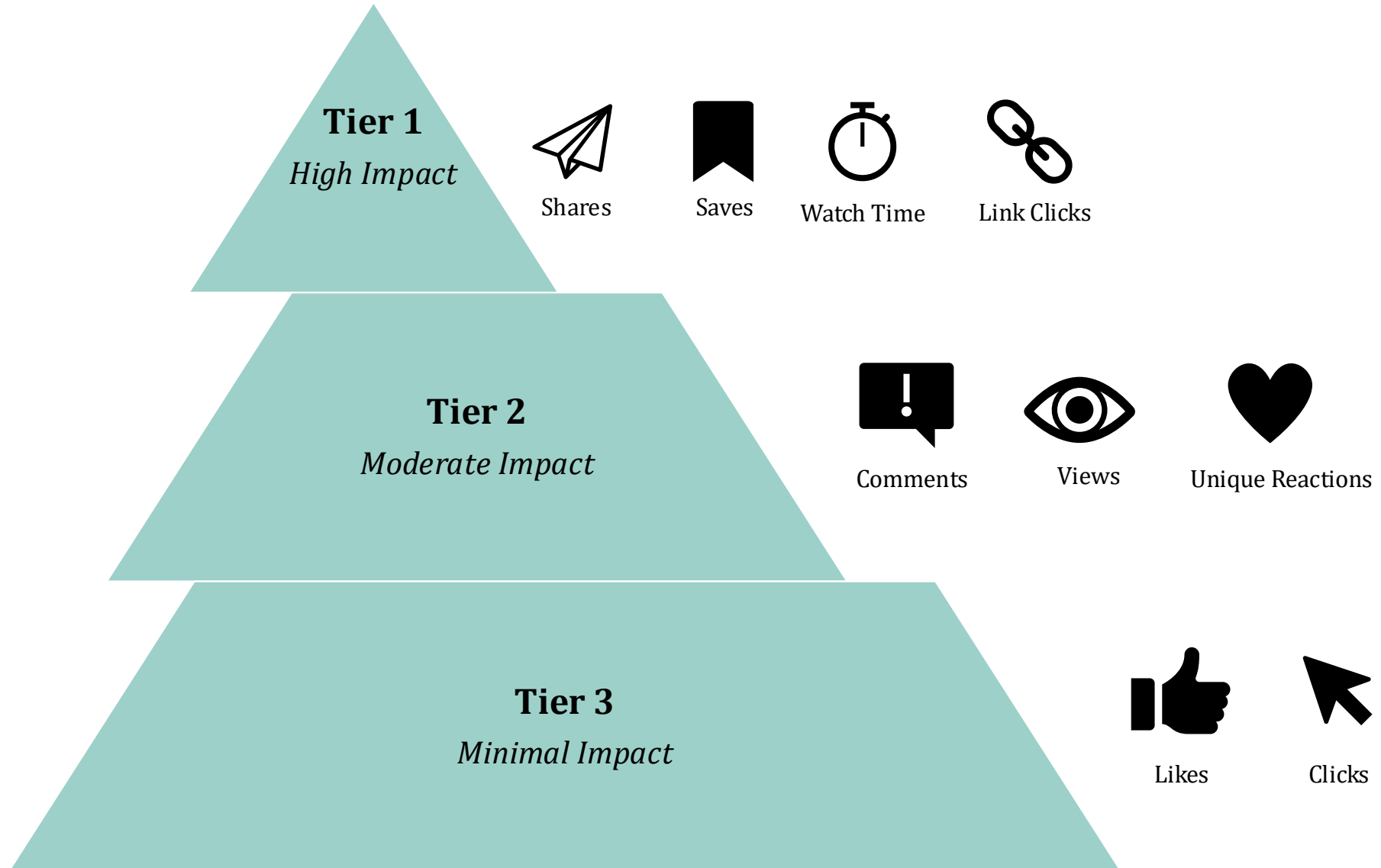
Relevance

Uniqueness

Content Quality

User Engagement

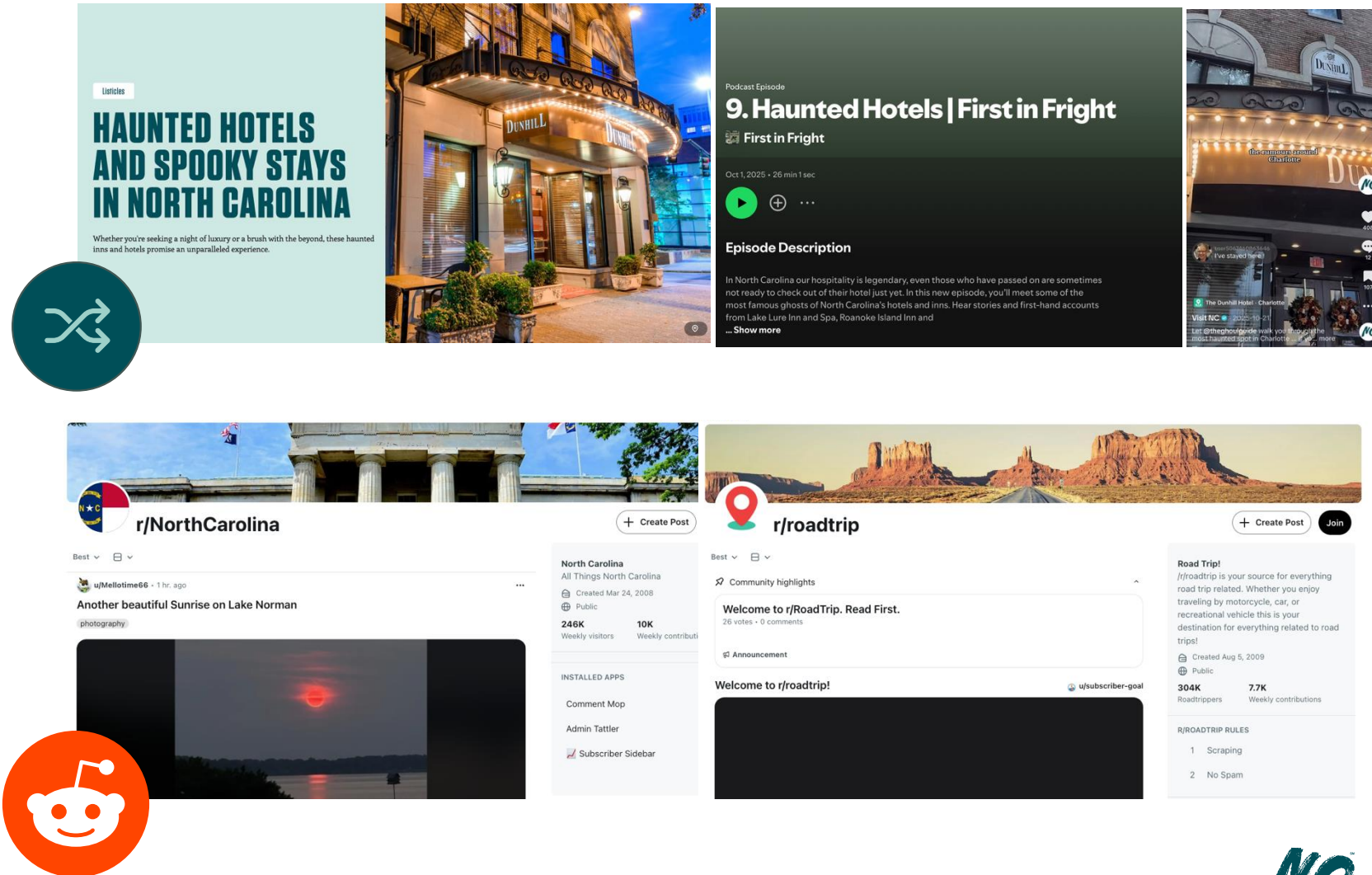
ENGAGEMENT HIERARCHY



3 WAYS TO SHIFT YOUR CONTENT APPROACH

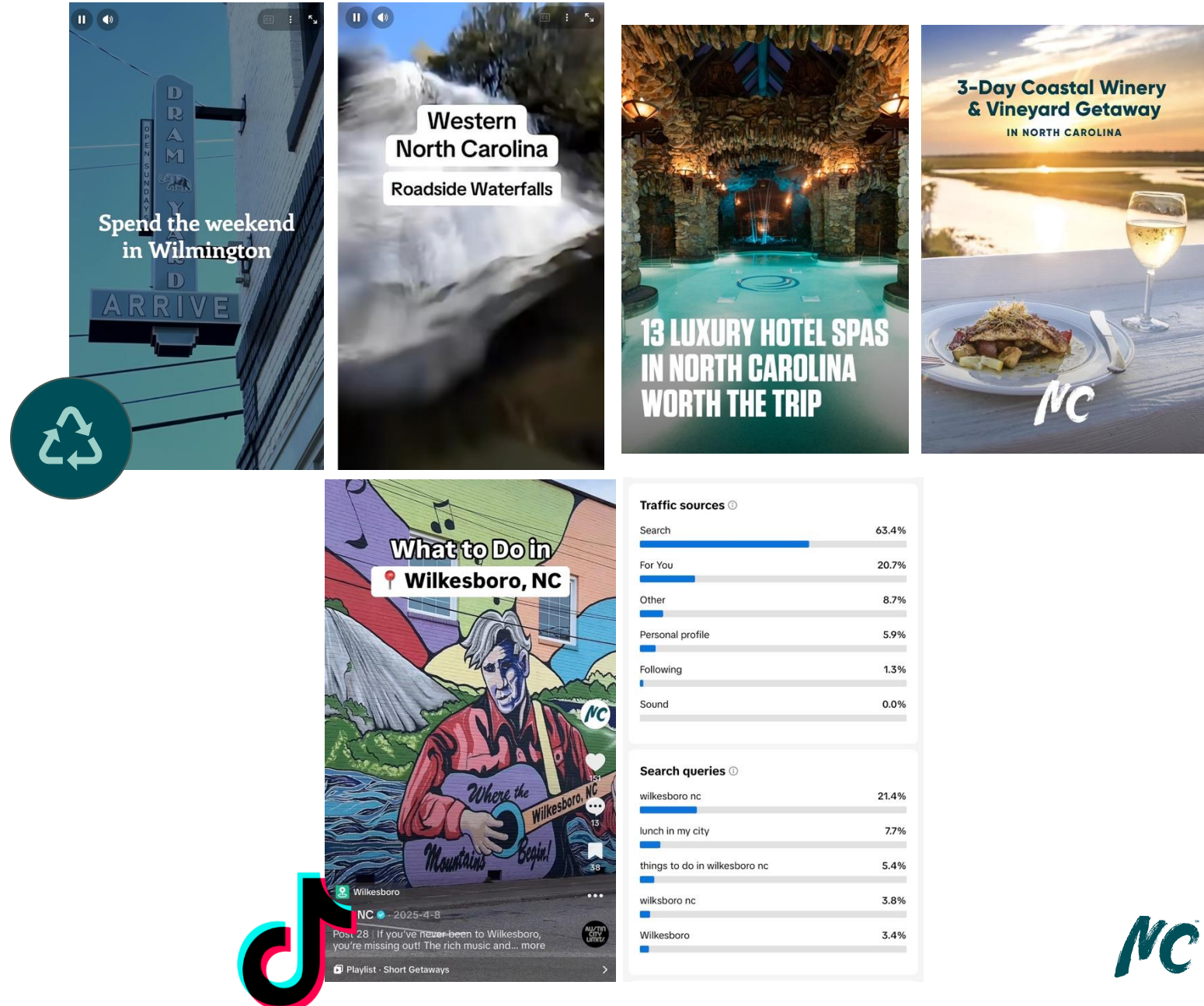
COMMUNITY OVER COMMONALITY

- Uniqueness and Relevance
- Specificity = Searchability
- Niche Identification



LEAN INTO EVERGREEN

- Social Search Engines & Indexing
- Long-Term Consideration Drivers
- Repurpose for Paid



LONG-FORM AND LONG-TERM

- More Information = More Context for LLMs
- Investment in Owned
- Long-Term and Extended Partnerships



1. Unexplained Phenomena | First in Fright

Visit North Carolina

Analytics Edit video

115

Share

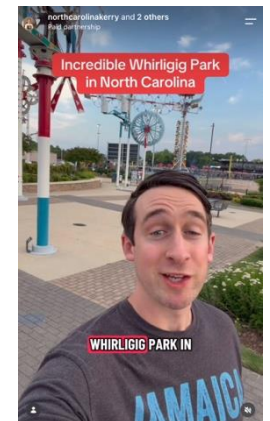
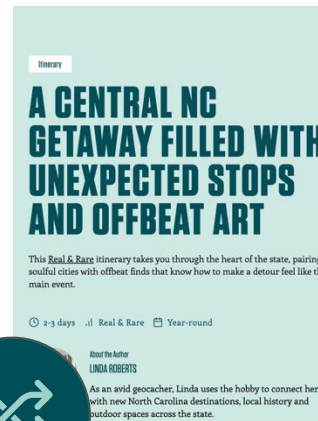
Promote

Ask

...



1 year ago First in Fright
...into North Carolina's fenshish tales including the legendary Devil's Tramping Ground, a mysterious barren circle and notorious spot for unsolved paranormal
...Discover the lore of one of NC's top scary places and hear the harrowing true story of a group of college students who dared to try and spend an evening in
...more



INDEXABILITY AND ALGORITHMIC MEDIA

WHY INDEXING AWARENESS CAN IMPROVE VALUE

What's indexing?

Indexing is just a platform allowing outside bots to read and store its content so that the information can show up in search results or get pulled into an AI-generated answer. Some platforms have welcomed this. Others don't!

What platforms are currently indexable?

Instagram, TikTok, YouTube, X, Reddit, LinkedIn

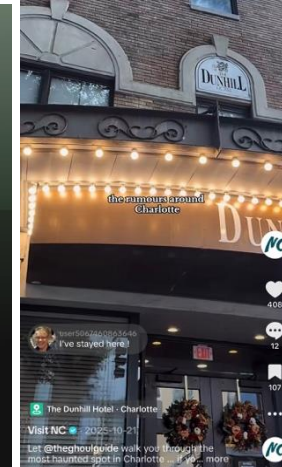
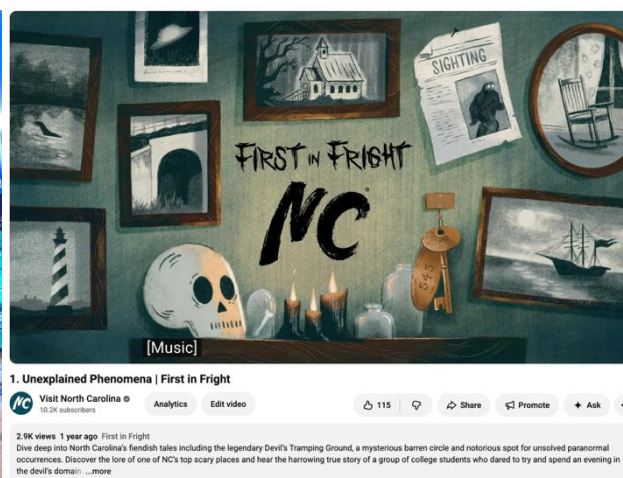
So, what does this mean?

While in-platform performance is important, layering in SEO/GEO tactics into your content now can give an additional “boost” outside of the algorithmic media platforms alone.

How can I prepare?

To take full advantage of indexability within algorithmic platforms, your team may want to allocate time toward strategizing around diversifying presence, defining community management roles and considering what opportunities exist for enhancing ROI on content. Make sure geotags and location tags are used consistently and match your Google Business Profile naming — this reinforces entity consistency across platforms.

BUILDING WITH INDEXABILITY + ALGORITHMIC MEDIA IN MIND



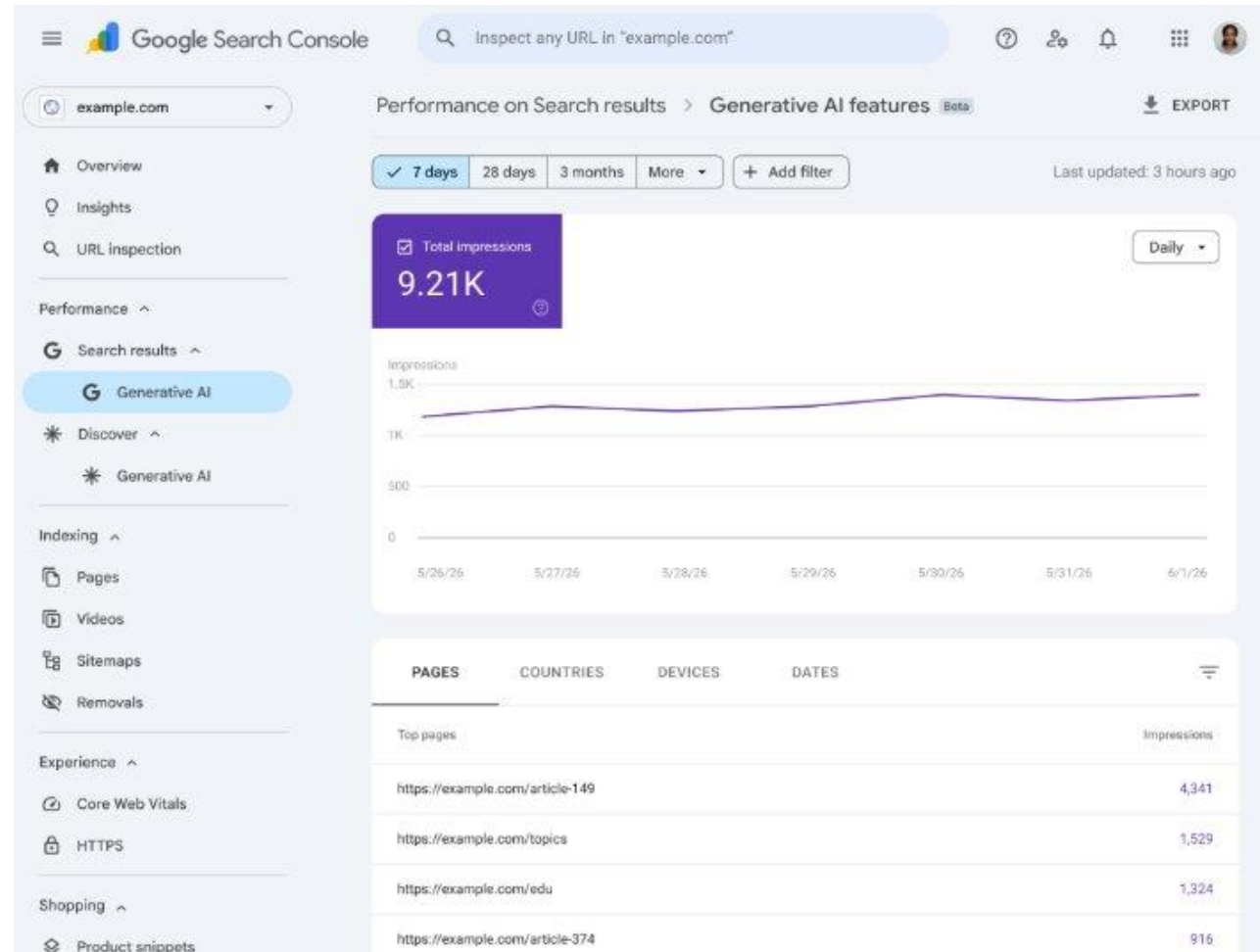
Base content: An itinerary that is structured with schema markup that provides long-term SEO/GEO value and builds link equity.



Integrated content-aware strategy that is created with channel-first best practices in place based on opportunity: Whether increasing indexability or broadening algorithmic reach, these tactics increase awareness and connect consumers to lower-funnel opportunities.

WHERE TO WATCH, HOW TO WATCH

- **Weigh in-platform benchmarks/measurements against indexability opportunities.** Find the right balance for you. Example: Choosing between a Stories Q&A style series for reach vs. static post with Q&A in comments for indexability.
- **Same Search Console, new tricks!** Google has added Instagram, TikTok, YouTube and X as additional property types that can be tracked in Google Search Console alongside web properties.
- **Google is also rolling out generative AI performance reports in Google Search Console.** Currently in beta, this allows you to look at impressions across all properties (within Google AI only).
- To get a better view of performance across SEO/GEO, additional measurement tools are available to license.



RETHINKING CREATORS

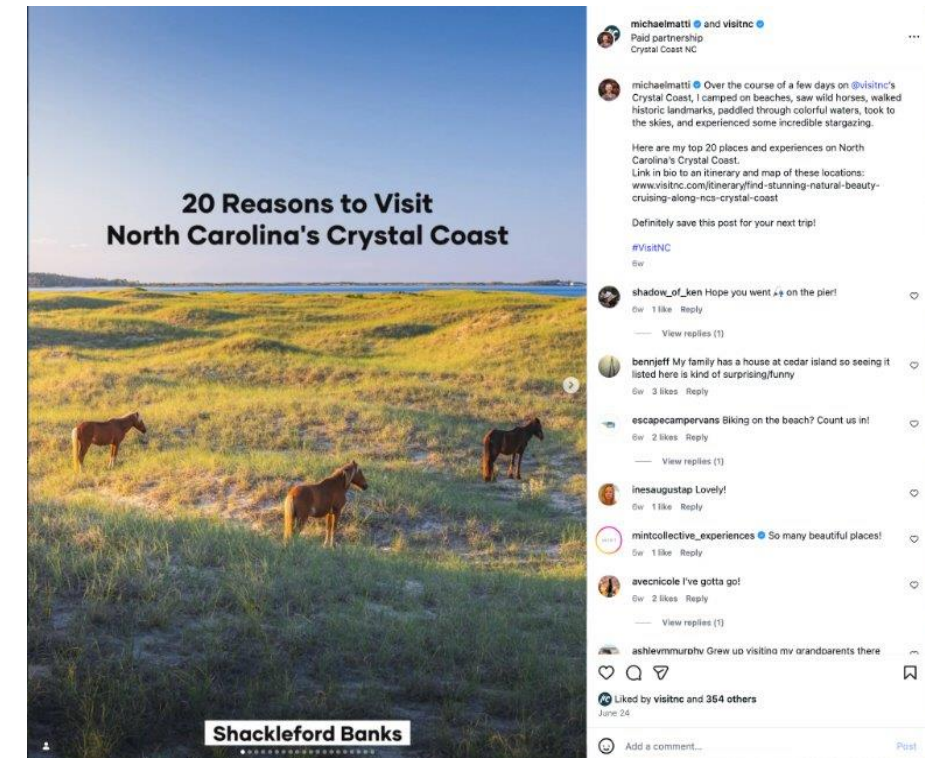
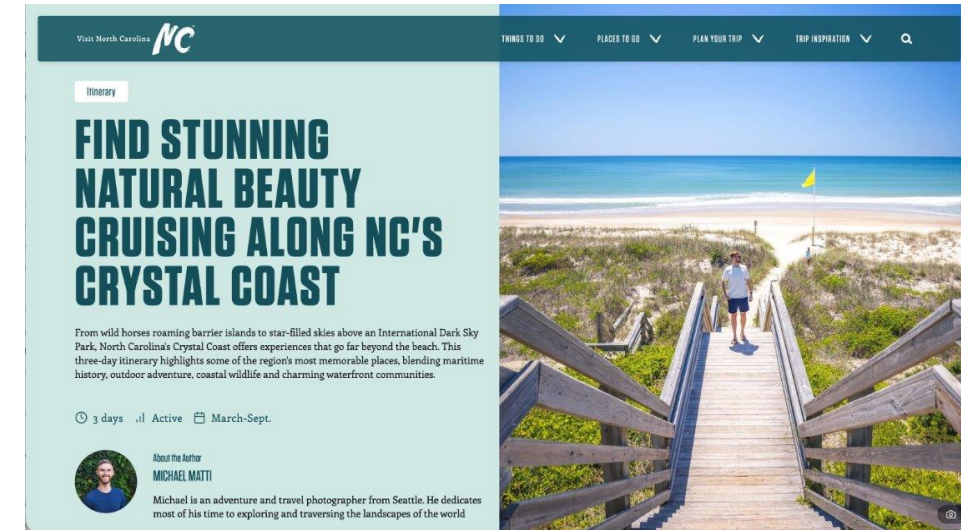
WHAT IS AN INTEGRATED CONTENT CREATOR?

An integrated content creator is someone who creates one piece of content and deliberately shapes it to work across multiple channels — social platforms, your website, video, email — instead of creating separate, disconnected content. The content changes format depending on the platform, but the message, voice and goal stay consistent everywhere it shows up.

WHY CREATOR INTEGRATION MATTERS

Integration is the approach a DMO needs to execute the “indexable-first” strategy — taking one inspiring destination concept/story (say, a fall foliage guide) and combining some or all of the example tactics below:

- **Develop a full itinerary or POI page for your website** (indexable, structured). The actual full itinerary page on your website — structured with schema markup and with actionable CTAs — is the anchor. This delivers both SEO and GEO value in the long term. Every social piece can link back to this page.
- **Turn it into an Instagram carousel** with a caption (indexable if public Business/Creator).
- **Clip it into a TikTok or Reel** (for reach, and links back to the indexable version).
- **Create and upload it as a longer-form video on YouTube** (indexable). Ensure the transcript reads like a usable guide since that’s what gets indexed and pulled into AI answers.



INTEGRATION AT WORK

Partnered with @michaelmatti on an integrated creator trip, generating strong reach and engagement while capturing ownable brand assets that were leveraged across channels

Algorithmic Performance

- Top-Performing Content: The Reel (“Camping in North Carolina”) drove 120,866 views, over 10x the next-best post.
 - Runner-ups: Tent/Milky Way carousel (15,784 views) and Milky Way hiker carousel (11,795 views).
- Save/share behavior: Reel had a 75% share-to-like ratio, a strong signal of organic word of mouth.

Web Performance

- 23% of page traffic from referrals.
- 79% engagement on web itinerary.

164K+

Total Views
(Reel + Carousels)

21.6K

Total Engagements

6.5K+

Post Shares

79%

Web Engagement





DON'T KNOW WHERE TO START?

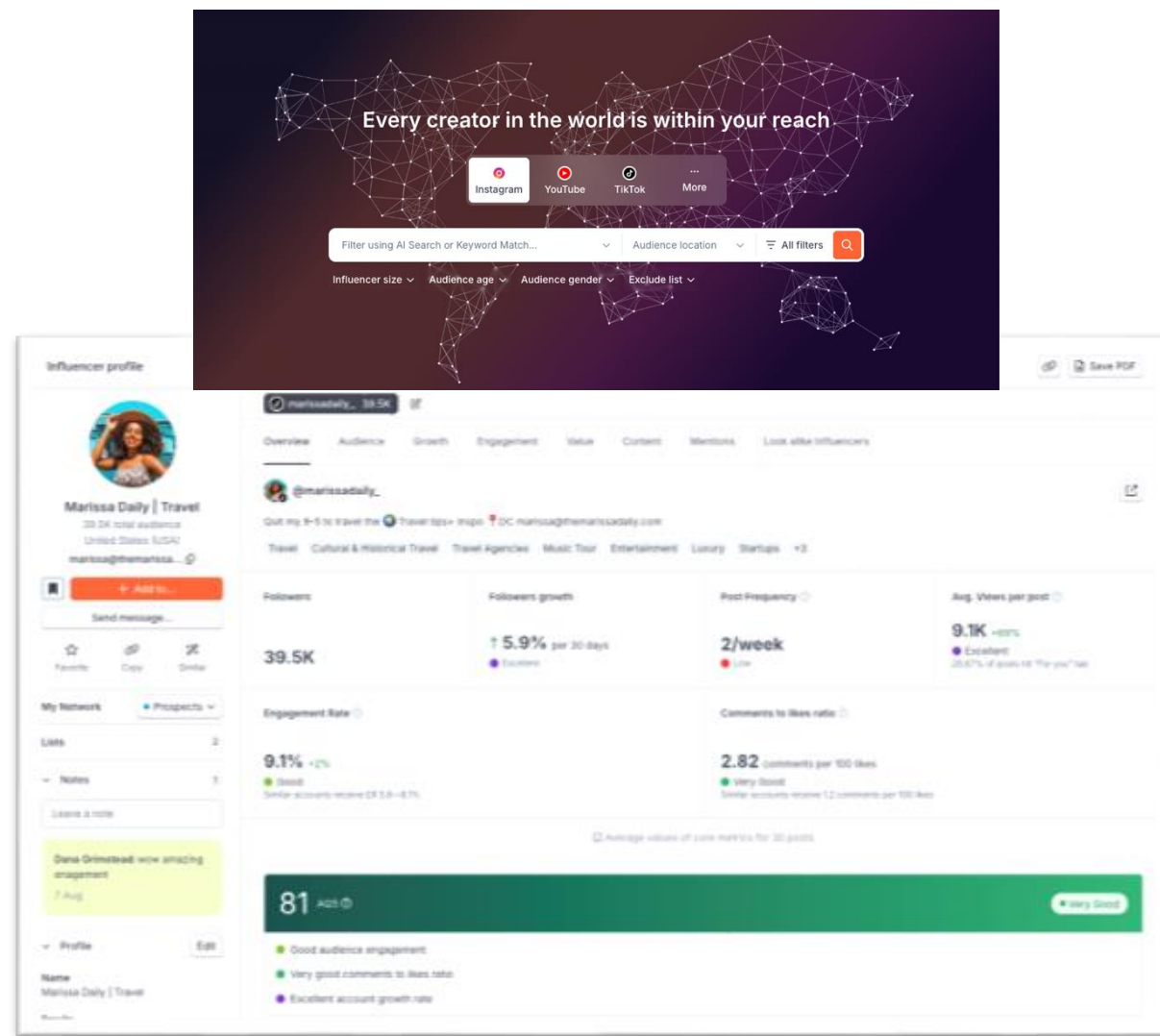
HYPEAUDITOR

HypeAuditor helps us find creators who align with your campaign objectives and target audience while also ensuring authenticity and avoiding fraud.

Why all the hype? Here's what is factored into selections:

1. **Audience Quality Scoring:** Grading quality of audience activity and engagement authenticity
2. **Fraud Detection:** Identifying creators with fake followers or inactive fans
3. **Audience Interests Analysis:** Ensuring the audience fits the ask
4. **Brand Safety Analysis:** Ensuring key hot topics are flagged
5. **Content Performance Analysis:** Helping gauge how well a creator's content performs

What you receive: A curated deck of 10 creators that fit your campaign goals and destination preferences.



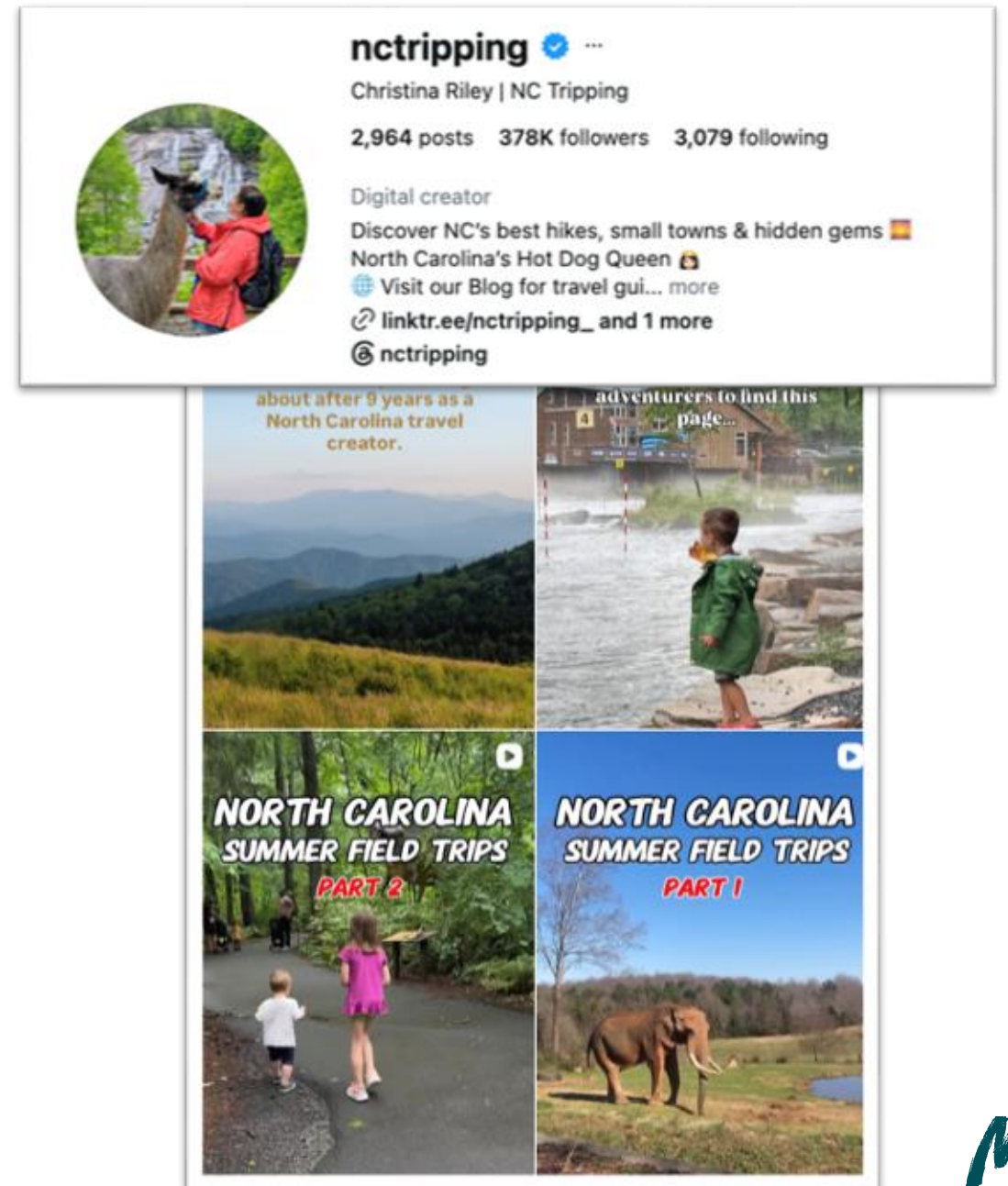
INTEGRATED CONTENT CREATOR PROGRAM

One creator, one trip, a full content ecosystem for your destination: social, editorial and web, all from a single visit.

Here's what's included:

1. **On-Location Capture:** Creator traveling to your destination to shoot original photo and video content in the moment
2. **Social Content:** High-performing video and posts published natively across the creator's own social channels
3. **Destination Blog Post:** Long-form story written by the creator and published on the Visit NC website
4. **High-Quality Web Imagery:** Professional-grade photos delivered for use on VisitNC.com and in future marketing
5. **Cross-Channel Amplification:** Content repurposed and shared across the creator's Instagram, TikTok, blog and other owned channels

What you receive: One creator visit that produces social content, a destination blog post and high-quality web imagery working together across every channel.



A photograph of a bowling alley with a strong blue color cast. In the foreground, a person wearing a red sweater and light-colored pants is leaning over a bowling lane, their hand reaching for a red bowling ball. The ball has the number '01' on it. To the right, another blue bowling ball is visible. In the background, other people are blurred, and the bowling alley's structure is faintly visible.

QUESTIONS?

INDEXABILITY-DRIVEN OPPORTUNITIES

- **Double- and triple-check account settings.** What can't be seen can't be indexed. Make sure accounts are public and set up as Business/Creator.
- **Create indexable comment threads where possible,** specifically for Instagram since captions and comments are now indexable for Business/Creator accounts, and prompt real Q&A in comments ("Ask us about visiting in shoulder season!") rather than just emoji engagement.
- **Use YouTube video descriptions and transcripts as the durable asset** and treat the comment section as a place to seed follow-up Q&A that reinforces the same keywords (e.g., "What's parking like downtown?" answered in a pinned comment).
- **Don't rely on X for indexable engagement** — it's the weakest link right now for anything time-sensitive or lasting.
- **Start thinking about a Reddit presence or strategy.** Google's 2024 content licensing deal gives Reddit content priority status in its indexing and AI training pipeline, and individual posts, subreddit pages and specific comments now rank for hundreds of thousands of queries. This is a top-tier source.
- **Publish LinkedIn articles, not just posts, for anything you want indexed.** A short post asking, "Why visit [location]?" currently won't get indexed reliably — a full LinkedIn article on the topic will, and its comments have a better shot too.