VISIT NC PARTNER WEBINAR

Visit North Carolina NC®

VISITOR SPENDING MODEL

- Annual study performed for Visit NC by Tourism Economics
- Combines a number of data sources that provide insights from visitor, local industry and government perspectives to estimate impact of tourism sector
- Model is comprised of more than 20 travel categories
- Statewide data released in May each year and county level data released in August

2025 STATEWIDE VISITOR SPENDING

- **$37.2 Billion** in Visitor Spending *(+1.3%)*
- **Nearly 231,000 Jobs** *(+0.3%)*
- **$1.4 Billion** in State Tax Revenues *(+2.0%)*
- **$1.3 Billion** in Local Tax Revenues *(+2.6%)*

Source: Tourism Economics 2026

COUNTY LEVEL VISITOR SPENDING — 2025 A PLATEAU YEAR

$37.2B

Visitor spending

+1.3% vs 2024

230,997

Tourism jobs

+0.3% vs 2024

59 of 100

Counties with higher spending

Growth was far from universal

The takeaway: statewide growth was modest. The real story is the wide dispersion beneath the average, across both counties and regions.

Dispersion — not direction — defined 2025.

59% of the 100 counties saw spending increase and 14% held essentially flat, but growth ranged from +14% to −8%. Ten of eleven regions gained; only Asheville & Foothills declined.

Source: Tourism Economics, 2026

TOP COUNTIES FOR SPENDING & EMPLOYMENT GROWTH 2024-2025

Visitor spending growth

County · % change · 2025 spending

1	Cherokee	+13.9%	$117M
2	Macon	+11.1%	$386M
3	Richmond	+9.7%	$66M
4	Chatham	+8.9%	$94M
5	Bertie	+8.8%	$27M
6	Johnston	+7.2%	$337M
7	Caldwell	+6.5%	$81M
8	New Hanover	+5.8%	$1,206M
9	Burke	+5.6%	$163M
10	Yancey	+5.5%	$77M

Tourism employment growth

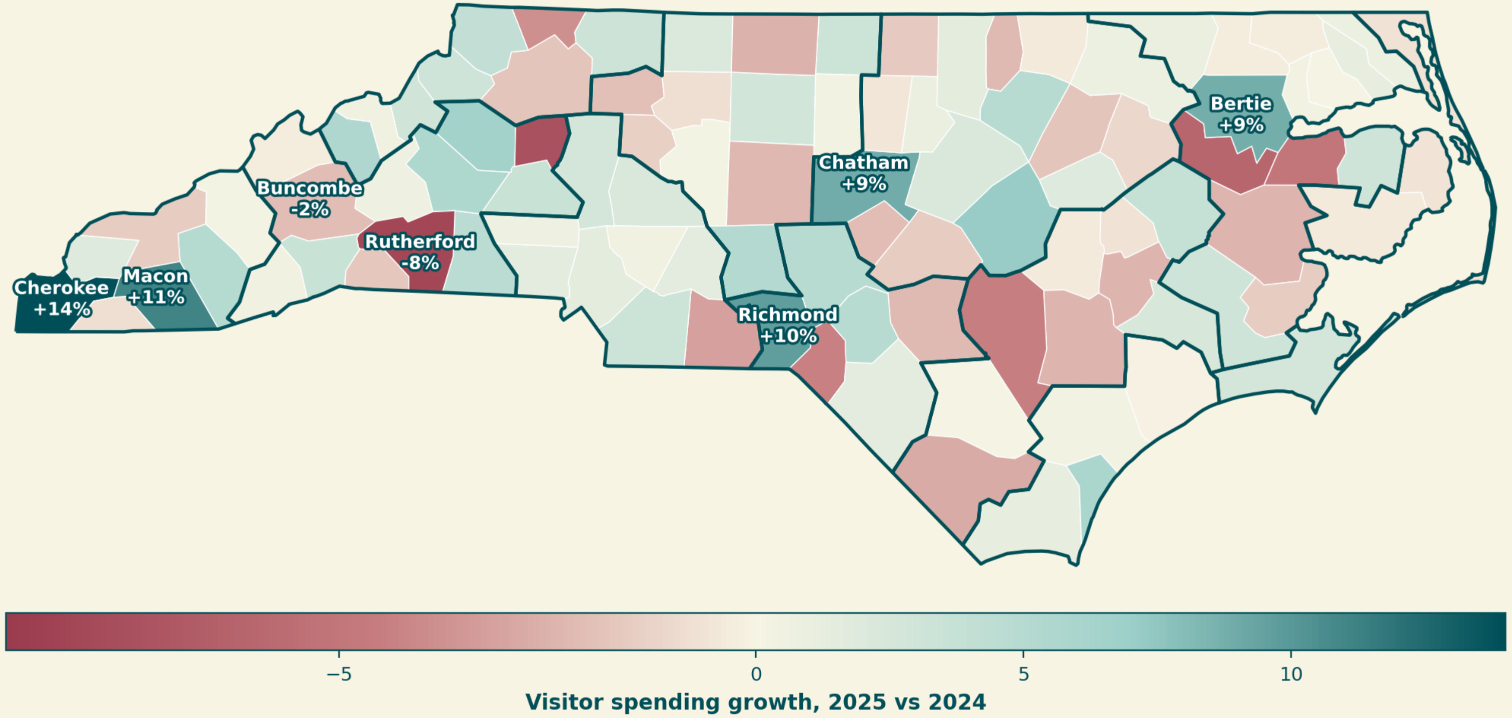
County · % change · 2025 jobs

1	Jackson	+7.3%	2,643 jobs
2	Johnston	+5.3%	2,179 jobs
3	Bertie	+5.0%	98 jobs
4	Avery	+5.0%	1,569 jobs
5	Richmond	+4.9%	438 jobs
6	Macon	+4.6%	1,809 jobs
7	Chatham	+4.5%	720 jobs
8	Burke	+4.2%	969 jobs
9	Cherokee	+4.0%	630 jobs
10	Henderson	+4.0%	2,813 jobs

Source: Tourism Economics, 2026

ONE STATE, ONE HUNDRED DIFFERENT STORIES

County spending growth ranged from +14% in the far west to −8% in the storm's core.



DOUBLE-DIGIT LEADERS

Cherokee	+13.9%
Macon	+11.1%
Richmond	+9.7%

STEEPEST DECLINES

Rutherford	−8.2%
Alexander	−7.5%

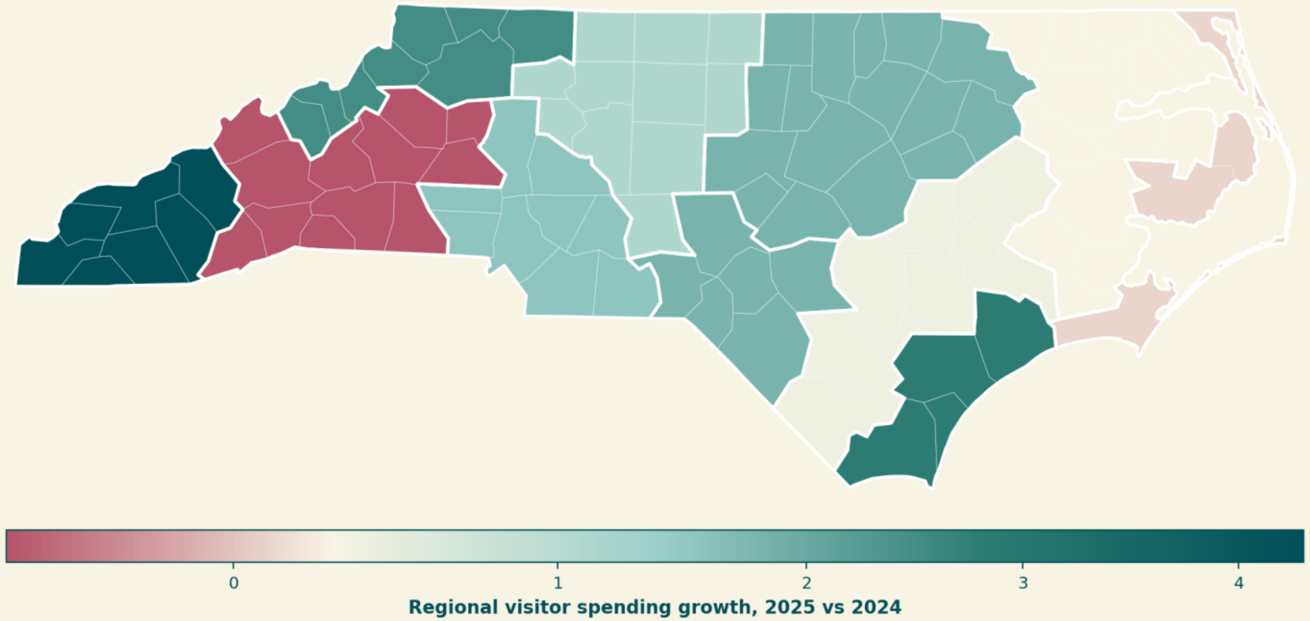
59% of counties

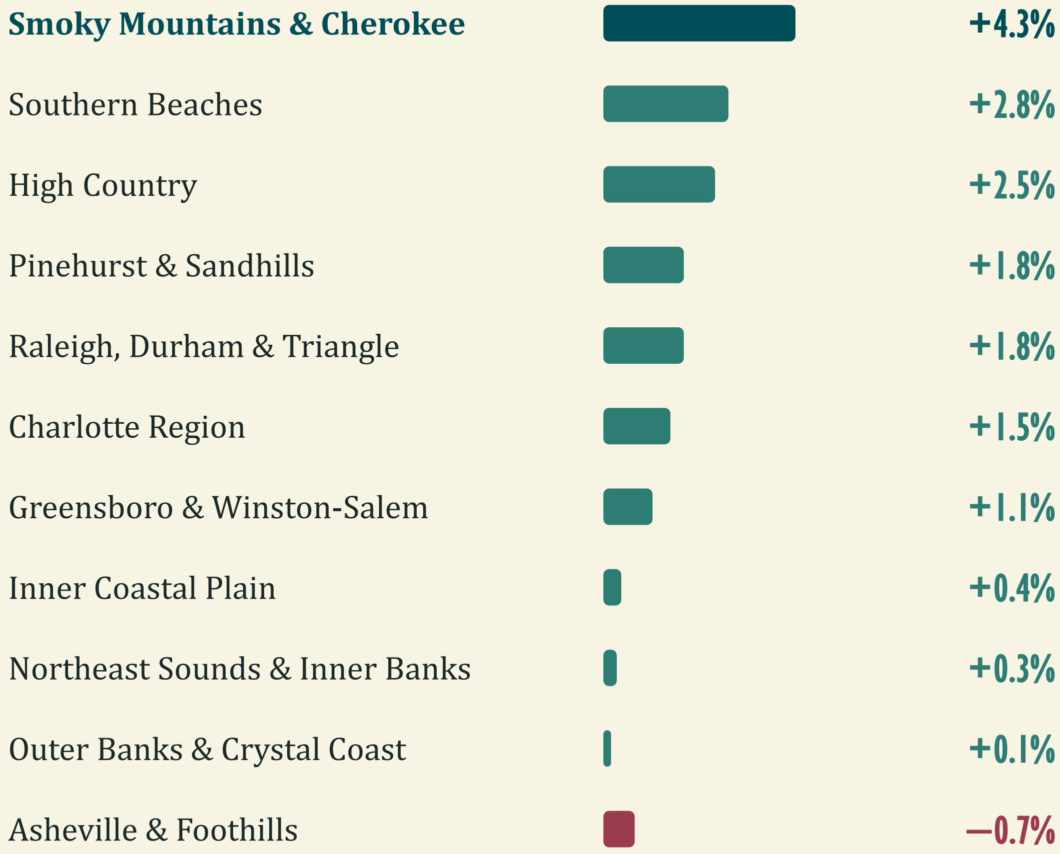
posted higher spending than in 2024

Source: Tourism Economics, 2026

REGIONAL SPENDING: MOUNTAIN MOMENTUM, ONE REGION STILL DOWN

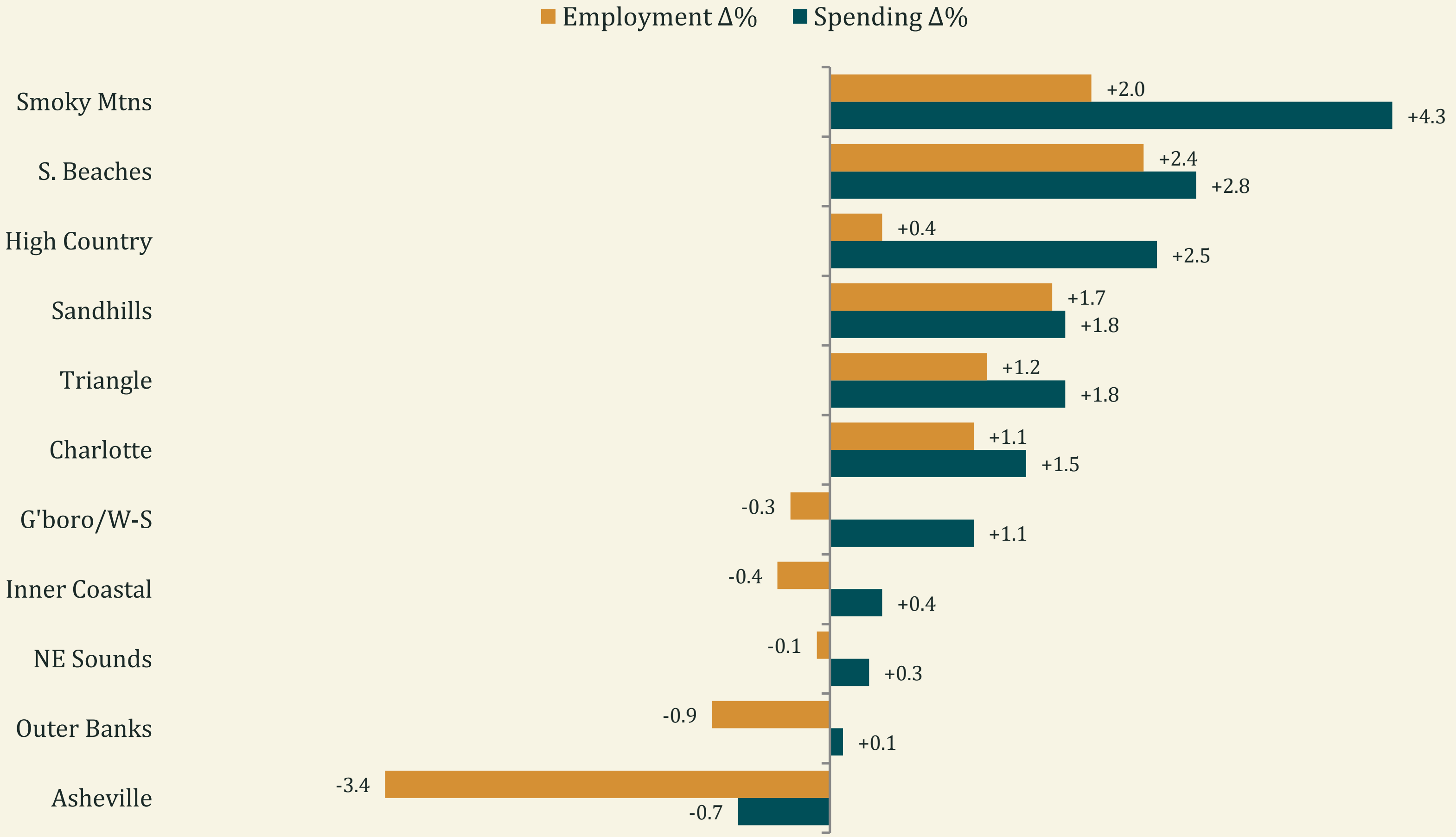
Every region gained ground except Asheville & Foothills, still absorbing Hurricane Helene.





SPENDING ROSE — DID THE JOBS FOLLOW?

In four regions tourism employment fell even as spending held or grew.



—3.4%

Asheville & Foothills tourism jobs

Buncombe alone shed 6.3% of its tourism workforce — the worst in the state.

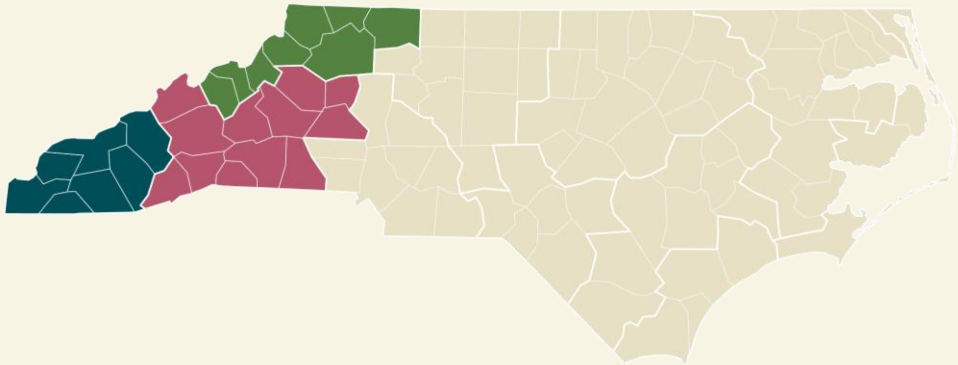
The bright spot

Only three regions added tourism jobs and grew spending together: **Southern Beaches (+2.4%), Smoky Mountains (+2.0%) and the Triangle (+1.2%).**

Source: Tourism Economics, 2026

ONE STORM, THREE MOUNTAIN STORIES

Helene shaped how each region measured 2025.



+4.3%

Smoky Mountains & Cherokee

Strongest in the state. Largely spared; Cherokee +13.9% and Macon +11.1%, with recreation rising alongside lodging.

+2.5%

High Country

A solid rebound. Retail up 4.1% signals real leisure demand; Yancey +5.5%, Ashe +4.0%, Watauga +3.1%.

−0.7%

Asheville & Foothills

The center of impact. Buncombe −2.1% (jobs −6.3%) and Rutherford −8.2%; growing foothills couldn't offset it.

Source: Tourism Economics, 2026

DID VISITORS OUTRUN THE ATTRACTIONS?

Where lodging outran recreation, rooms filled before damaged parks, trails and sites could reopen.

Balanced recovery

Cherokee & Macon — recreation up ~10% right alongside lodging. The healthiest pattern in the west.

Rooms ahead of attractions

Watauga & Surry — lodging climbed while recreation stayed flat. A likely upside for 2026 as sites reopen.

Still rebuilding

Rutherford — recreation fell 18% with Chimney Rock's attraction base destroyed.

Source: Tourism Economics, 2026

2025 COASTAL PICTURE

THE COAST: TWO REGIONS, ONE QUESTION

Did the late-2024 federal shutdown suppress coastal travel? The data says to monitor.

Outer Banks & Crystal Coast +0.1%

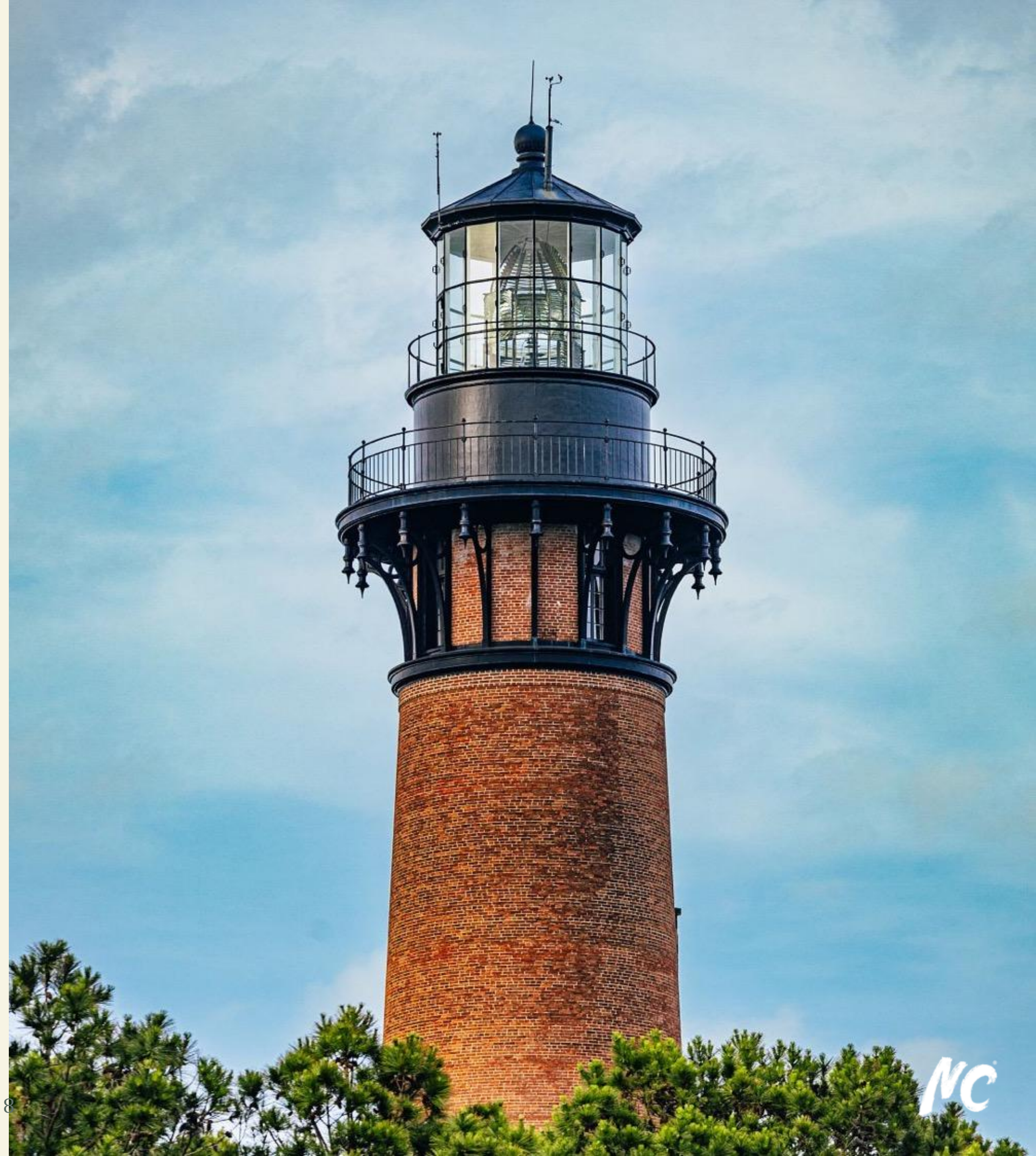
The flattest coastal region. Dare has now softened two years running (−2.3%, then −0.6%) and regional recreation fell 2.5%.

Southern Beaches +2.8%

Healthier — but the gain was almost entirely New Hanover (+5.8%, lodging +7.9%) in 2025 and Brunswick in 2024, Pender and Onslow were flat in 2025. Strength here is local, not a federal-shutdown rebound.

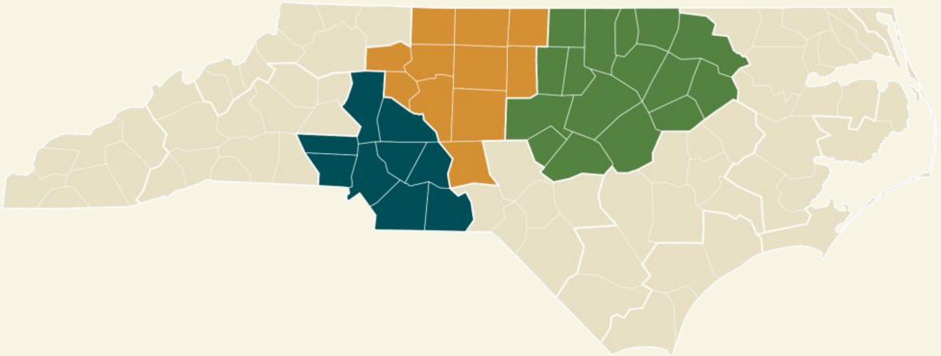
The flat coast reads more like normalization after strong post-pandemic years.

Source: Tourism Economics, 2026



IN THE PIEDMONT, THE RURAL COUNTIES SHOWED STRONG NUMBERS

The more urban counties held steady; but their collar counties drove the growth.



+1.8%

Raleigh, Durham & Triangle

Chatham +8.9% · Johnston +7.2% · Franklin +4.9%

Wake held at +2.4%

+1.5%

Charlotte Region

Union +3.3% · Iredell +2.8% · Rowan +2.2%

Mecklenburg +1.5%

+1.1%

Greensboro & Winston-Salem

Montgomery +5.2% · Guilford +2.9% · Stokes +2.1%

Forsyth −0.8%

The Triangle was one of only three regions to add tourism jobs (+1.2%).

Source: Tourism Economics, 2026

COUNTIES THAT BEAT THE STATE

The year's standouts spanned every corner of North Carolina — not just the mountains.

+13.9%
Cherokee
SMOKY MTNS
Recreation & lodging both up ~10%

+11.1%
Macon
SMOKY MTNS
Broad-based Smokies strength

+9.7%
Richmond
SANDHILLS
Racing returns to the speedway

+8.9%
Chatham
TRIANGLE
Lodging +14.7%, retail +14.4%

+8.8%
Bertie
NE SOUNDS
Led a flat eastern region

+7.2%
Johnston
TRIANGLE
Lodging +7.8%, retail +11.5%

+4.9%
Moore
SANDHILLS
Resilient after the 2024 U.S. Open

+3.9%
Pitt
INNER COASTAL
F&B +5.7%, retail +5.7%

Steepest declines: Rutherford −8.2% · Alexander −7.5% · Martin −6.1% · Sampson −4.5% · Scotland −4.4%

Source: Tourism Economics, 2026

LOOKING AHEAD

WHAT TO WATCH IN 2026

01 Dispersion over direction

A near-flat state average hides a −8% to +14% county spread. Read 2025 region by region, not as one number.

02 An uneven mountain recovery

The Smokies rebound is broad; the High Country's is real but recreation lags — a 2026 upside — while Asheville & Foothills is still down.

03 Jobs are the soft spot

Four regions lost tourism employment even as spending held. Buncombe's 6.3% job loss shows where the workforce hasn't returned.

04 A normalizing coast

Flat, not suppressed. Watch Dare's two-year slide and whether New Hanover's momentum broadens to the rest of the coast.

Source: Tourism Economics, 2026 · Visit North Carolina — Economic Impact of Travel

NEXT WEBINAR — OCTOBER 8, 2026