



FY 2023-2024

Pinehurst, Southern Pines, Aberdeen Area

ANNUAL REPORT



HomeofGolf.com

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MESSAGE FROM PHIL WERZ PRESIDENT CVB

The 2023-24 FY was once again one for the record books. Since COVID, our destination has been witness to arguably the greatest growth ever in the golf industry. The demand for golf in our globally-recognized destination is off the charts and with the belief that a rising tide floats all boats, our success has earned us a spot among the 10 best tourism economies in North Carolina. We finished the 2023-24 FY with an all-time record \$3.93 million in occupancy tax collections, buoyed by the success of the 2024 U.S. Open championship at Pinehurst No. 2. That event alone attracted more than 250,000 to Moore County. In June, collections set an all-time record of \$726,054 – a 126% increase from the previous June. We concluded the FY up 21.7% in collections.

Our visitor spending calculations are conducted annually by Tourism Economics and U.S. Travel Association and shared by our state tourism friends with Visit North Carolina. For the 2023 calendar year, Moore County set an all-time record with \$805 million in visitor spending – up 7.4% from the previous calendar year. That report also stated that lodging in Moore County accounted for \$203 million of that sum, an increase of 5.7% from 2022. Daily visitor spending in Moore County was \$2.2 million, up \$200k per day from 2022. A little more than 6,000 people are employed by the tourism industry here, second only to the healthcare industry. Lastly, did you know that visitors spending their dollars here saves each Moore County residents \$532 in state and local taxes, too.

We do not see the momentum slowing anytime soon either. In the last year, we witnessed the USGA's Golf House Pinehurst opening and the return of the World Golf Hall of Fame to its original home. We also cracked the deal on Moore County's first destination distillery with BHAWK (Brad Halling American Whiskey Co.) and the opening of the first brewery in Carthage at The Buggy Factory by Southern Pines Brewing Company. With more than 200 annual events, outdoor adventure on more than 30 trails, the arts, a vibrant music scene, fabulous local restaurants, quaint downtown shopping opportunities and an emerging agritourism scene, Moore County is poised for growth in the years ahead.

Thank you to everyone who supports tourism in Moore County!



Phil M. Werz

MISSION, VISION, 5 PILLARS & CORE VALUES

MISSION

The mission of the Pinehurst, Southern Pines, Aberdeen Area Convention & Visitors Bureau is to devise strategies to enhance the County's tourism brand value and product, to accommodate the next generation of visitors, thereby stimulating the local economy and enhancing the quality of life for residents and visitors alike.

VISION

The Pinehurst, Southern Pines, Aberdeen Area Convention & Visitors Bureau is the recognized as the authority on travel and tourism to the destination known as The Home of American Golf. The CVB is a content marketing machine and expert storytellers in leveraging the tourism assets of Moore County.

5 PILLARS

OWN ALL THINGS GOLF

PROMOTE OUTDOOR ACTIVITIES

CELEBRATE SMALL TOWNS

LEVERAGE AUTHENTICITY

BUILD THE APPEAL OF NON-GOLF ACTIVITIES

CORE VALUES

As the official destination marketing organization for the County of Moore, the Convention & Visitors Bureau and its Board of Directors have adopted the following core values to guide the decisions which manage the organization. We aspire to operate at the highest level of excellence in marketing, benchmarking our performance against top performing CVBs in the United States.

PASSION

Enthusiasm for our destination, its people and our visitors

CREATIVITY

Encourage the sharing and development of new ideas and concepts

STEWARDSHIP

Be faithful owners of our destination, its development, image and reputation

KNOWLEDGE

To become known as the trusted source for information about the destination

RESULTS-DRIVEN

All efforts focused on driving more visitors to the destination and providing those visitors experiences that will make them return



A Short History of the *Moore County* Tourism Development Authority



On May 14, 1987 the North Carolina General Assembly approved House Bill 138 Chapter 188, and act to authorize Moore County to levy a 3% room occupancy tax. As a result, the Moore County Tourism Development Authority was formed. Subsequently, the TDA legislation was updated by House Bill 545, Session Law 2011-113, June 9, 2011, which permitted an act to modify the Moore County Occupancy Tax up to 6%. Then, on September 30, 2015, House Bill 504, Session Lay 2015-256 permitted an act to authorize for Moore County to levy the additional 3% (Total 6%) Occupancy Tax.

The Authority shall D.B.A. as the "Pinehurst, Southern Pines, Aberdeen Area – Convention and Visitors Bureau" (CVB), hereinafter members are referred to as "Board" and Visitors Bureau as "Bureau".

As set forth in House Bill 138, Chapter 188 of the General Statues of North Carolina and by resolution of May 14, 1987 and updated by House Bill 545, Session Law 2011-113 the North Carolina General Assembly June 9, 2011, the Board shall have the following Twelve (12) members:

1. A county commissioner appointed by the County Commissioners.
2. Five (5) owners or operators of hotels, motels or other taxable tourist accommodations: Two (2) of which own or operate the Largest hotel, motels or other accommodations by rental unit count, who shall be appointed by the County Commissioners. Three (3) of which owner or operators of hotels, motels or other taxable tourist accommodations by rental unit count, who shall be appointed by the County Commissioners.
3. The President/CEO of the Moore County Chamber of Commerce.
4. Two (2) individuals interested in the tourism business who have demonstrated an interest in tourist development but do not own or operate a hotel, motel, or other taxable tourist accommodation, who shall be appointed by the County Commissioners.
5. The following shall serve as non-voting, ex officio members of the Bureau: Finance officer of Moore County, County Manager of Moore County and Economic Developer of Moore County.

The TDA is managed as a destination marketing organization (DMO) and is headed by the President & CEO, appointed by the Moore County Board of Commissioners. The President & CEO serves the nine-person CVB Board of Directors and holds quarterly meetings to update the board and the public on occupancy tax collections and marketing updates.

MEET THE CVB BOARD OF DIRECTORS

The Pinehurst, Southern Pines, Aberdeen Area Convention & Visitors Bureau is served by a 9-person Board of Directors. Based on current by-laws, the Board consists of five hoteliers, a member of the Moore County Board of Commissioners, the President of the Moore County Chamber of Commerce and two residents appointed by the County Commissioners to serve as "tourism interested" citizens. This list is based on the 2023-24 FY.

Kelly Miller

CVB Board Chairman
President, Ross Resorts



Andy Hofmann

CVB Vice President
Owner, Pine Crest Inn



Matt Hausser

CVB Treasurer
General Manager, Talamore Golf Resort

Tom Pashley

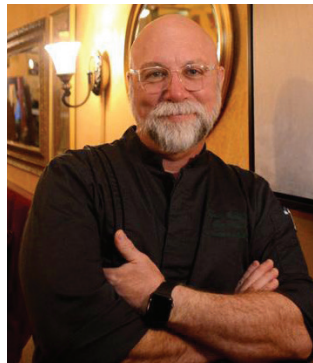
President, Pinehurst Resort

Bonnie McPeake

Owner, McPeake Hotels, Inc.

Frank Quis

Moore County Commissioner



Linda Parsons

President,
Moore County Chamber of Commerce

Warren Lewis

Owner, Chef Warren's

Natalie Dean Hawkins

(ex-officio) President,
Moore County Economic Development

Wayne Vest

(ex-officio)
Moore County Manager

Caroline Xiong

Moore County Finance Officer (ex-Officio)



MEET THE CVB STAFF

The Convention & Visitors Bureau (CVB) for the Pinehurst, Southern Pines, Aberdeen Area is proud to represent a world-class golf resort destination. Located in Moore County, NC, the CVB is the county's official destination marketing organization, and develops and implements strategies that enhance the economic and brand value of tourism to the benefit of visitors and residents alike.

Tourism often remains underestimated as an economic driver in many communities like ours. Consequently, it is our responsibility as the Convention and Visitors Bureau to continually emphasize its vital role within our county. For a deeper understanding of our activities, strategies, and supported projects, we encourage you to subscribe to our Destination Marketing Newsletter.

As we look forward to 2025, we remain optimistic about the positive impact that tourism will continue to have on Moore County. For more information or to learn more about the CVB, please stop by our office, call 910.692.3330/800.346.5362 or visit homeofgolf.com. The CVB office is open Monday through Friday from 9 a.m. to 5 p.m., and is located at 155 W. New York Avenue, Suite 300, Southern Pines, NC 28387.



Phil Werz

President & CEO

Years of Service: 6

Directs and leads the CVB, creates and executes the annual marketing plan and maintains budget and expenditures. Represents the CVB within the Moore County community and externally for all travel and tourism interests.

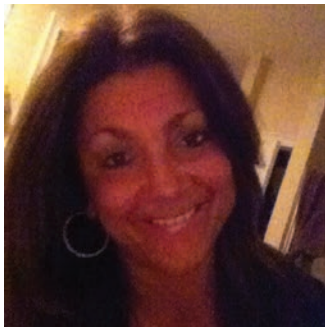


Melissa Holt

Vice President CVB Affairs

Years of Service: 1 month

Assists the President and CEO with a variety of responsibilities including destination and economic development, marketing, public relations, community engagement and staff supervision. Content creator and manages all social media channels.



Lisa Long

Creative Director

Years of Service: 18

Creates and develops all print and digital marketing materials and designs marketing campaigns to promote the destination. Provides direction for design of annual destination guide. Coordinates all other marketing-related projects.



Dan Dreyer

Destination Storyteller

Years of Service: 5

Responsible for longer form videos and coordinates with CEO & VP for ongoing content creation and ideation. Produces bi-monthly podcast, "Paradise in the Pines." Manages all video production elements and CVB still photography. FAA certified drone pilot.



Donna Murphy

Staff Accountant

Years of Service: 5

Performs accounting functions for CVB and coordinates with Moore County Finance Office to maintain budget and other finance-related procedures including requisitions and billing. Assists in the management of the office and oversees bulk distribution of annual destination guide.



Megan McDonald

Digital Specialist

Years of Service: 1 month

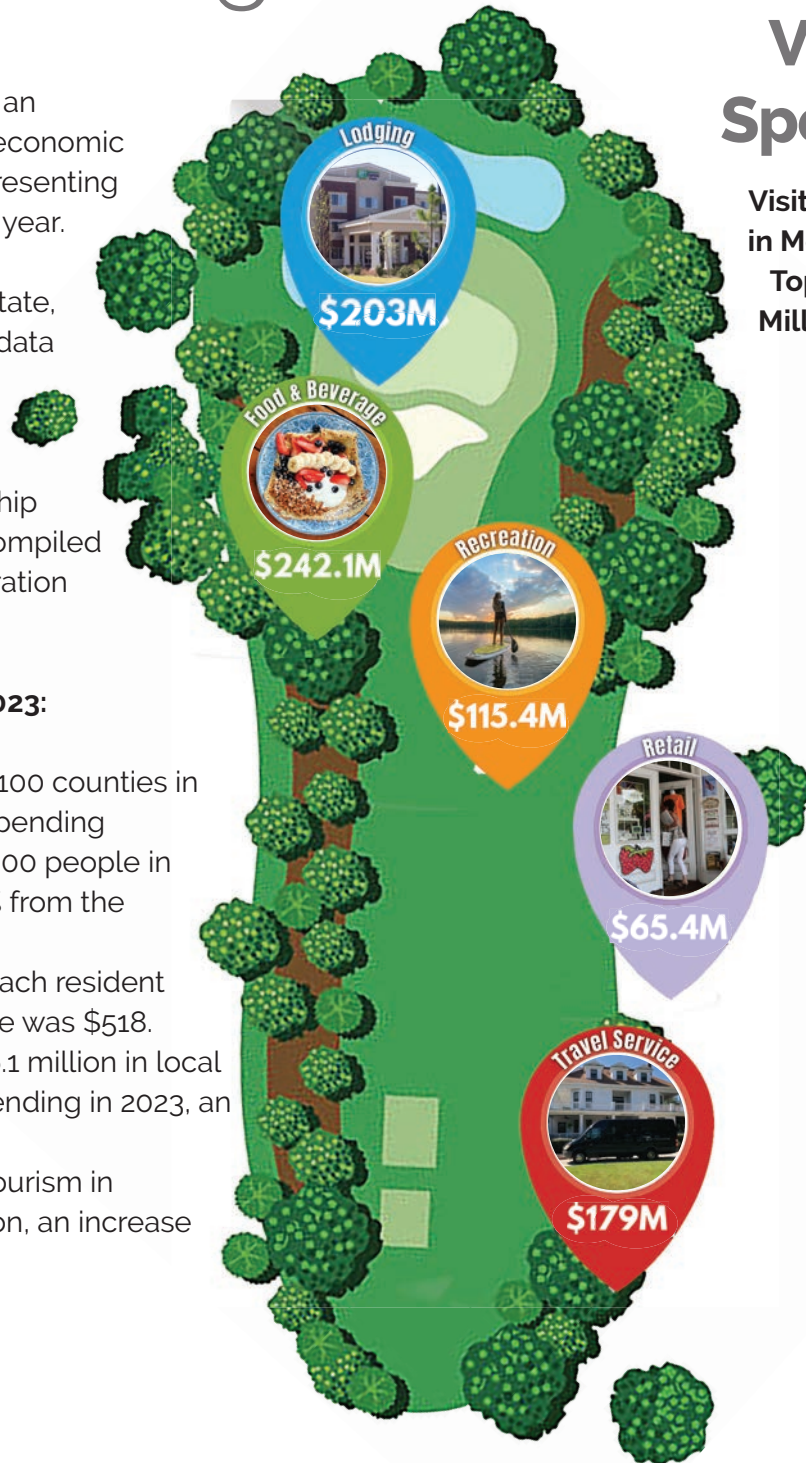
Maintains the CVB website (homeofgolf.com). Maintains all social media channels for the CVB. Creates "Weekend in the Sandhills" weekly reels. Executes search engine optimization (SEO) strategies. Assists VP of CVB Affairs with content.

Overview of 2023 Visitor Spending

In 2023, Moore County witnessed an unprecedented \$805.1 million in economic impact from visitor spending, representing a 7.4% increase from the previous year. Moore County remains the tenth highest tourism economy in the state, its highest ranking in history. The data comes from an annual study commissioned by Visit North Carolina, a unit of the Economic Development Partnership of North Carolina (EDPNC), and compiled by Tourism Economics in collaboration with U.S. Travel Association.

Tourism Impact Highlights for 2023:

- Moore County ranks 10th among 100 counties in North Carolina for annual visitor spending
- The tourism industry employs 6,000 people in Moore County, an increase of 7.1% from the previous year
- Tourism in Moore County saved each resident \$532.10 in taxes. The state average was \$518. The reports also showed that \$26.1 million in local taxes was derived from visitor spending in 2023, an increase of 5.6%
- State tax revenue generated by tourism in Moore County totaled \$30.8 million, an increase from \$28.9 million from 2022.



Visitor Spending

Visitor spending
in Moore County
Topped \$805
Million in 2023.

These statistics come from the "Economic Impact of Travel on North Carolina Counties 2023," which can be accessed at: partners.visitnc.com/economic-impact-studies

The report also provided visitor spending based on a variety of sectors. Overall, Moore County reports visitor spending totals for 2023 in these areas:

LODGING	(\$203 million, up from \$192 million in 2022);
FOOD AND BEVERAGE	(\$242.1 million, up from \$222.9 million in 2022);
RECREATION	(\$115.4 million, up from \$101.7 million in 2022);
RETAIL	(\$65.4 million, up from \$63.6 million in 2022);
TRANSPORTATION	(\$179 million, up from \$169.2 million in 2022)

Statewide, visitor spending in 2023 rose 6.9 percent to reach a record \$35.6 billion.

Direct tourism employment increased 4.8% to 227,224.

Tourism Statewide Highlights for 2023:

- Total spending by domestic and international visitors in North Carolina reached \$35.6 billion in 2023. That sum represents a 6.9 percent increase over 2022 expenditures
- Domestic travelers spent a record \$34.6 billion in 2023. Spending was up 6.8 percent from \$32.4 billion in 2022
- International travelers spent \$997 million in 2023, up 9.5 percent from the previous year.
- Visitors to North Carolina generated nearly \$4.5 billion in federal, state and local taxes in 2023 - the total represents a 5.8 percent increase from 2022
- State tax receipts from visitor spending rose 5.6 percent to \$1.3 billion in 2023
- Local tax receipts grew 5.4 percent to \$1.2 billion
- Direct tourism employment in North Carolina increased 4.8 percent to 227,224
- Direct tourism payroll increased 6.6 percent to nearly \$9.3 billion
- Visitors spent more than \$97 million per day in North Carolina. That spending adds \$7.1 million per day to state and local tax revenues (about \$3.7 million in state taxes and \$3.4 million in local taxes)
- Each North Carolina household saved \$518 on average in state and local taxes as a direct result of visitor spending in the state. Savings per capita averaged \$239
- North Carolina hosted about 43 million visitors in 2023

FINANCIAL Review



The chart below reflects county occupancy tax collections, by month, from the middle of COVID (July 2020) through the end of the 2023-24 FY (June 2024). Our current occupancy tax rate is 3% and has been since the CVB opened in 1987. This indicates that tourism has more than rebounded from the pandemic and has reached unprecedented heights and is reaching an all-time record high of \$3.93 million.

OCCUPANCY TAX COLLECTIONS SINCE 2020

MONTH	FY 2020-21	FY 2021-22	FY 2022-23	FY 2023-24
July	\$150,988.63	\$258,286.11	\$258,930.89	\$279,598.46
August	\$151,873.32	\$257,338.05	\$275,421.88	\$286,450.93
September	\$173,463.29	\$280,244.10	\$307,583.71	\$356,438.59
October	\$233,743.42	\$329,822.71	\$376,424.29	\$403,256.48
November	\$143,377.99	\$212,632.70	\$233,864.61	\$257,590.67
December	\$68,833.92	\$117,030.43	\$118,435.85	\$142,126.12
January	\$88,933.77	\$118,133.78	\$122,980.10	\$144,462.96
February	\$97,277.89	\$143,712.92	\$167,078.56	\$193,059.02
March	\$200,060.42	\$287,151.41	\$298,227.98	\$287,215.57
April	\$296,819.34	\$382,505.57	\$397,479.44	\$492,677.60
May	\$308,388.34	\$365,073.43	\$367,700.19	\$367,266.05
June	\$279,976.78	\$300,716.55	\$319,848.25	\$726,054.64
TOTALS	\$2,193,737.11	\$3,052,635.76	\$3,233,475.05	\$3,933,201.62

TOP 10 BEST ALL-TIME COLLECTION MONTHS

MONTH/YEAR		MONTH/YEAR	
June 2024	\$762,054	October 2022	\$376,423
April 2024	\$492,677	May 2023	\$367,700
October 2023	\$403,256	May 2024	\$367,266
April 2023	\$397,479	May 2022	\$365,073
April 2022	\$382,505	June 2014	\$361,498

One-Time Project Fund (OTPF) Awards



For the first time in the history of the CVB, the organization created a One-Time Project Fund (OTPF) grant program to offer matching funds for municipalities and non-profits that qualified for tourism-related projects.

During the 2023-24 FY, the CVB awarded \$821,000 in matching grants. The program was proposed due to a surplus within the CVB's fund balance.

The OTPF grant award recipients included:

- Town of Cameron: Memorial Park Revitalization and Mural Creation (\$54,000)
- Site Improvements at the Weymouth Center for the Arts and Humanities (\$57,000)
- Lighting Project at Sandhills Community College for the Sandhills Bogeys Baseball Complex (\$75,000)
- Town of Southern Pines: Carriage House event space building inside the Whitehall Tract (\$185,000)
- Town of Southern Pines: New Skate Park (\$200,000)
- Town of Aberdeen: Enhancements for Sports Tourism at the Aberdeen Ransdell Sportsplex (\$250,000)

The Purpose of the One-Time Project Fund (OTPF) was to encourage creation or expansion of capital projects that will showcase Moore County's unique offerings and will attract visitors from outside a fifty (50) mile radius, thus generating overnight stays and creating economic and destination tourism impact for Moore County.



2024 U.S. Open



Pinehurst Resort hosted the 2024 U.S. Open golf championship in June which was won by Bryson DeChambeau. The week-long event welcomed more than 250,000 people to Moore County and based on CVB research (not inclusive of USGA statistics not available at the time of this report), the event produced the following (compared to June 2023):

- Hotel Occupancy 75.4 (up 10%)
- Gross Hotel Revenue: \$24 million (up 11.2%)
- Hotel Average Daily Rate: \$296 (up 11.2%)
- Occupancy Tax Collections \$723,491 (up 126%)
- Short-term rental (STR) revenue: \$9 million (up 268%)
- STR Occupancy 64% (up 13.4%)
- STR Average Daily Rate \$606 (up 99.4%)
- Overall Average Length of Stay: 3.5 nights

The next U.S. Open in the destination will be held in June 2029 at Pinehurst Resort. This will be a duel U.S. Open as men's and women's championships will be held on consecutive weeks. The last time and only other time back-to-back U.S. Open championships were held was in 2014 at Pinehurst Resort.

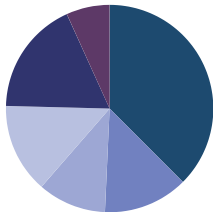




June 10 to 16, 2024

Pinehurst Resort & C.C. (Course No. 2),
Village of Pinehurst, North Carolina

Average Spending **\$1,156.40**
Per Attendee for Entirety of Trip



Accommodation	\$433.93
Dining	\$152.84
Transportation	\$123.40
Retail Shopping	\$161.84
Recreation	\$206.17
Grocery & Liquor	\$78.22

44%

Elsewhere in North Carolina

44%
Out of State

12%
Local
(Moore County)

Average Length Of Stay

3.4 Nights

Average Travelling Party Size

2.9 People

Economic Impact

\$242.5M

TOTAL OUTPUT

\$112.8M Total Direct Output	\$102.9M Total Value Added
\$88.6M Total Indirect Output	\$63.2M Total Labor Income
\$41.1M Total Induced Output	1,812 Total Jobs Supported

Visitor Spending

\$95.7M Total Output
\$12.8M Total Tax Impact
1,030 Jobs Supported

Tournament Operations

\$146.4M Total Output
\$9.5M Total Tax Impact
780 Jobs Supported

Impact of Tournament Purse	Total Output	Total Tax Impact	Jobs Supported
	\$350.6K	\$46.2K	2



AUDIENCE RESEARCH, REPORTING & ANALYTICS BY:



124th U.S. Open Economic Impact

Media Partnerships



Consistent, positive and ongoing relationships with key media partnerships allow the CVB to achieve earned media placements throughout the year. Along with strategic paid advertorials and editorials, these media opportunities provide the avenue for the CVB to tell its story and continue to attract existing visitors to the destination, as well as cultivate new ones - not only from the Carolinas, but throughout the Southeast, and from around the country and world. Partnerships with outlets such as Our State, Garden & Gun, The Local Palate, multiple golf publications, state golf associations and regional media, including Business NC and Business Journal, are essential for our tremendous success. In 2024, Our State reported that editorial content pertaining to Southern Pines in their "Tar Heel Towns" series and "Weekend Guide to Pinehurst & Southern Pines" were their fifth- and ninth-most read articles, respectively. These mostly digital placements are responsible for more than 25 million impressions across all media partnerships.



Partnership Marketing



The CVB is actively involved in developing partnerships with golf and non-golf related companies to leverage our destination via co-branding opportunities. The CVB has conducted such partnerships in the past with companies like Donald Ross Sportswear, Brumate, Golden Flake, Golf Pride and others. In 2024, the CVB partnered with the California-stylish golf apparel company johnnie-O for an exclusive Enter-To-Win opportunity which included a trip to the 2024 U.S. Open at Pinehurst No. 2 and rounds of golf in the destination as the grand prize. The "Drive for Style" Sweepstakes produced 14,688 entries, 37,082 promotional page views, 5,337 CVB unique opt-ins for email database, and almost 12,000 johnnie-O promotional code downloads.



Event Management



U.S. Kids Golf World Championships

With more than 250 annual events in Moore County, the CVB is actively involved in a number of large-scale events and especially ones that produce the most return on investment in the form of overnight stays and collection of county hotel occupancy tax. The annual U.S. Kids Golf World Championships will celebrate its 20th year inside the Home of American Golf and has an annual economic impact of \$15.1 million. The event is held for two weeks at the end of July and beginning of August with more than 2,000 of the best junior players from all 50 states and three dozen counties descending upon the destination for championships played

at numerous golf courses throughout the Sandhills, including at Pinehurst Resort. More than 30 current and former PGA Tour and LPGA Tour players have competed in the USKG World Championships in the Pinehurst area.



Pinehurst Barbecue Festival

A Celebration of Taste and Tradition, the Pinehurst Barbecue Festival has quickly become one of the best such festivals in North Carolina. The three-day event is held every Labor Day weekend and showcases seven of the finest pitmasters in the Tar Heel State. Highlighted by Food Network star Christopher Prieto, the weekend features a Q-School Grilling Class, Bourbon & Bites event, all capped off by the final day Christopher Prieto Invitational where all seven pitmasters offer their best combination of BBQ and sides. The event attracts thousands of people from around the Carolinas and is responsible for significant room night bookings.



Sandhills Motoring Expo

The Sandhills Motoring Expo is an annual event taking place every Memorial Day Weekend in Pinehurst and celebrates automotive culture and craftsmanship. The Expo features a variety of activities and attractions tailored to automotive enthusiasts of all ages and interests. Events include social events and dinners, a Road Rally through Moore County, Cars and Coffee, an Artisan Tour featuring local sculptors, painters, and other craftsmen, and a Soiree at the Moore County Airport. The Expo's signature event is the Sunday Concours

in the Village which showcases a diverse array of vehicles ranging from classic and vintage to modern and exotics. Participants arrive early and linger longer which leads to dozens of extended stays in area hotels, resorts and short-term rentals.



Festival D'Avion

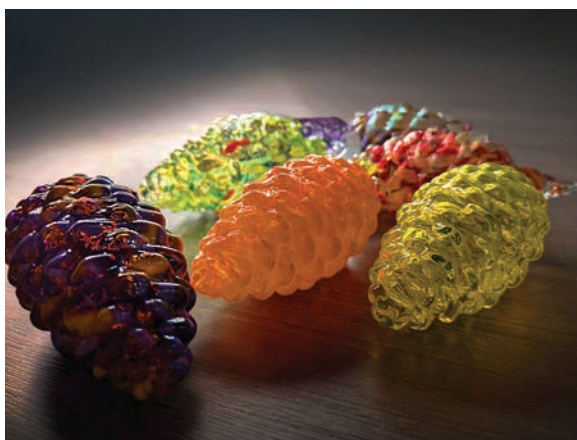
This annual event is a Celebration of Freedom and Flight held at the Moore County Airport in Carthage. The Festival D'Avion features classic and military aircraft displays, flyovers, precision parachute jump teams, sightseeing tours via plane and helicopter, classic car display, live entertainment, a "junior pilot" KidZone, local vendors, food trucks and fun for the entire family. The event works closely with nearby Fort Liberty and U.S. Department of Defense for a number of military flight displays including C-130 aircraft and CV-22 Osprey planes, among other static displays.



Peach Week

The CVB created Peach Week in 2023 as an extension of the annual N.C. Peach Festival in nearby Candor. Peach Week is a celebration of all things peach as the CVB partners with numerous Moore County based peach farmers to provide the product to numerous area restaurants, so peaches can be incorporated into menu items for visitors and residents to enjoy all week long. Aside from the restaurant week, there are specific events held through the week to celebrate Peach Week including a 5K Fun Run, Peach Night with the Sandhills Bogeys baseball team, miniature golf outing at Wee Pines in Olmsted Village, Peach-A-Palooza party at James Creek

Cider House and more. In a short time, the event has attracted visitors from throughout the Carolinas with local hotels and lodging partners benefitting from overnight stays.



Pinecone Pathways Program

Held each spring, the Pinecone Pathways Program has become a viral sensation in just two years. The CVB has partnered with glassmakers from StarWorks in Star, NC to produce 100 unique and colorful glass pinecones. The pinecones are hidden along a number of hiking trails throughout Moore County. The idea originated from the Year of the Trail campaign introduced by Visit NC in 2023. The allure of the glass pinecones is they cannot be purchased and must be found by those seeking them on area trails announced by the CVB. The annual campaign is responsible for hundreds of bookings in area hotels with visitors arriving

from numerous states including Virginia, South Carolina, Tennessee, Georgia, Florida and Ohio.

Social Media Influencer Impact



The social media space is an impactful tool and another way for us to communicate directly with our audience. Currently, we participate in numerous social media channels including Facebook, Instagram, X, YouTube, TikTok and LinkedIn. While the CVB maintains a daily presence on all of our social media channels, the impact of third party social media influencers is critical to how our destination is presented to the outside world. Specifically, the CVB collaborated with social media company Stellar to host a trio of prolific social media influencer who collective possess more than 1 million followers. While our destination is known as the Home of American Golf, the CVB understands that the area must also appeal to non-golf enthusiast in order to diversify the visitor segmentation. Stellar assisted the CVB to find new and engaging ways to connect and communicate with new audiences to showcase and leverage our brand.

We followed along as Madelyne explored Pinehurst's natural beauty with hikes at Weymouth Woods and a stunning paddle at Reservoir Park. Annie took us on a culinary adventure through the area, stopping at aesthetic coffee shops and sampling delicious food at the renowned Pinehurst Barbecue Festival. Meanwhile, Megan dove into Pinehurst's history as the Home of American Golf as well as featured the locally-owned businesses that are the beating heart of the region.

The organic portion of the campaign has so far garnered 16.5 million impressions (far surpassing our guaranteed 5 million impressions for the whole of the campaign) with an impressive number of reach and engagement. Each of the three creators brought their own style to highlight their discoveries on their respective trips to Pinehurst and the Southern Pines.



Megan boasts the highest reach of more than 357,800 on her coverage of the area. Her Instagram Carousel featuring her Pinehurst finds amassed nearly 50,000 views and 1,800 likes.

Annie's Instagram Reels performed exceptionally well, reaching 65,200 and 47,800 views, respectively. She had a reach of 164,800 that continues to grow, even though she's completed her first round of coverage.

Meanwhile, Madelyne's coverage of the area's natural beauty garnered a reach more than 115,000. She over-delivered far beyond her contracted deliverables, resulting in the added value of 38 Instagram Stories and a YouTube short.

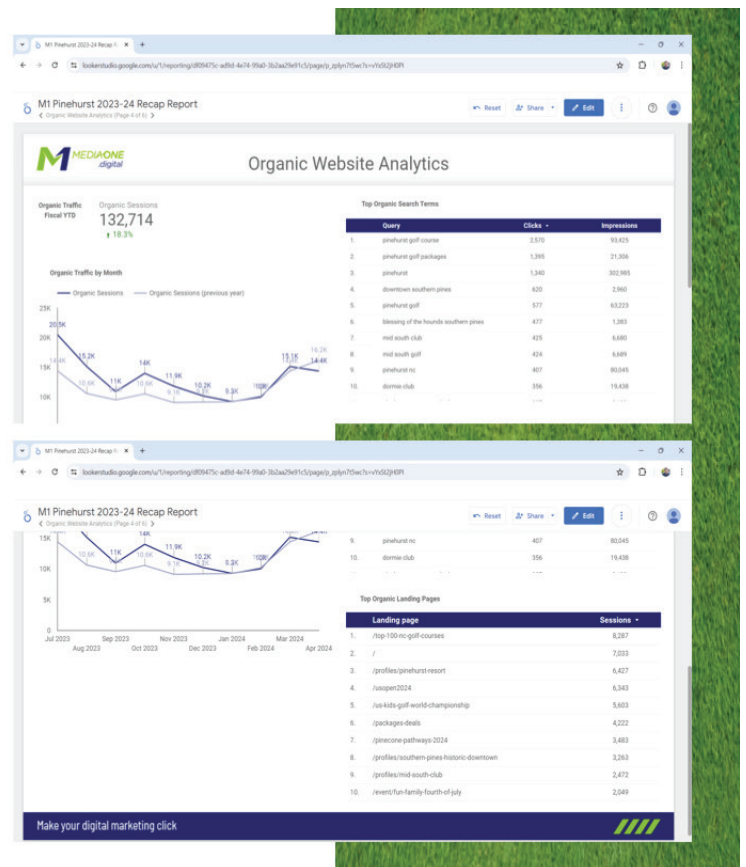
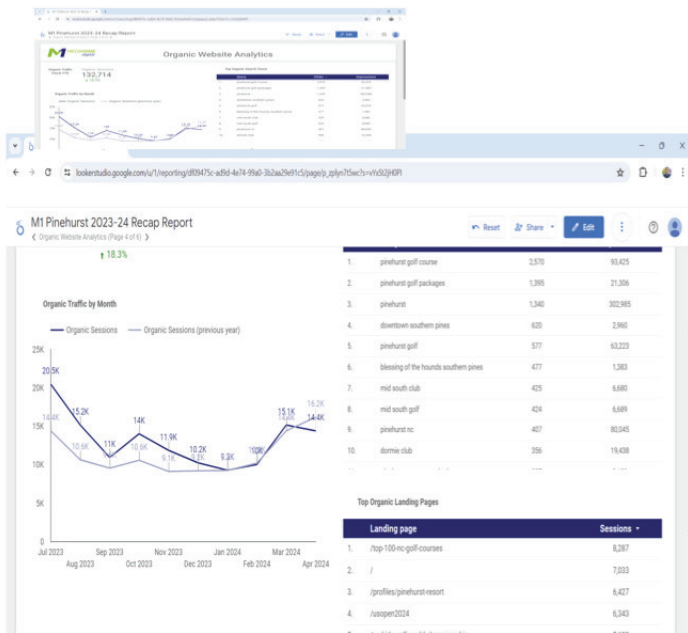


Research Highlights



The CVB coordinates with MediaOne for all research and visitor data collection. This information is extremely important, as it provides us with key data about website visits, where our visitors are coming from and areas where those visitors frequent while in the destination. This allows us to be strategic in our marketing and to ensure that we are reaching the consumer with the proper messages at the right time in their travel-decision making process. Among all of our social media channels, our Home of American Golf YouTube channel is a major marketing tool for us, given the enormous amount of video content the CVB produces on a daily and weekly basis. Video content is an essential part of the CVB's marketing strategy and how we enhance our destination storytelling process. Our new website has also been a key driver of traffic and the first year produced substantially more visits and length of time spent on it, per person.

ORGANIC TRAFFIC OVERVIEW



YOUTUBE OVERVIEW

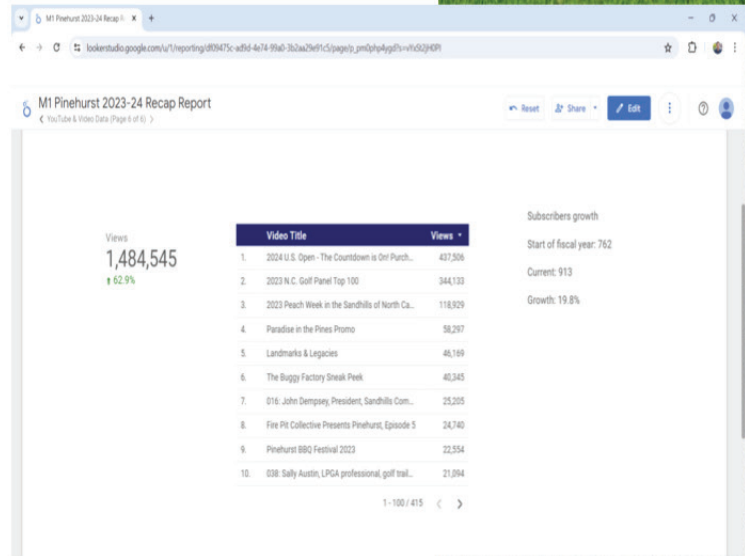


TOTAL VIEWS

- 1,484,545
- **63% increase**

SUBSCRIBERS GROWTH

- Start of Fiscal: 762
- Current: 913
- **20% increase**



SEARCH VOLUME DATA

- Search volumes overall are up **17.1%** over last year showing even more demand this year
- March had the largest increase followed closely by February and November (**all up over 25%**)
- Hotels, Resorts and other lodging search volume is up **30.2%**
- Airbnb and VRBO searches are up **9.5%** with just over 10,600 searches this fiscal year

KEYWORD	22-23 TOTAL	23-24 TOTAL	CHANGE
pinehurst resort nc	375,100	483,000	28.8%
pinehurst nc	287,300	235,200	-18.1%
southern pines	134,700	178,400	32.4%
pinehurst resort golf	90,600	81,200	-10.4%
pinehurst resort	85,900	102,800	19.7%
restaurants in pinehurst	57,300	65,400	14.1%
hotels in pinehurst nc	50,400	76,800	52.4%
pinehurst hotels	38,500	57,000	48.1%
carolina hotel pinehurst nc	54,400	80,900	48.7%
pine crest inn pinehurst	32,600	37,400	14.7%
pinehurst golf packages	32,900	26,500	-19.5%
longleaf golf southern pines	19,400	26,100	34.5%
holly inn pinehurst	23,600	31,200	32.2%
pinehurst nc village	17,300	20,100	16.2%
homewood suites pinehurst	15,300	14,400	-5.9%
southernpines golf	11,100	11,280	1.6%
jefferson inn southern pines	19,300	21,000	8.8%
springhill suites pinehurst	13,800	21,500	55.8%
jefferson inn southern pines nc	19,300	21,000	8.8%
country club of nc pinehurst	14,100	13,200	-6.4%
comfort inn pinehurst nc	9,780	11,100	13.5%
things to do in pinehurst nc	10,980	11,400	3.8%
best restaurants pinehurst nc	8,360	10,800	29.2%
attractions in pinehurst nc	10,980	11,400	3.8%
pinehurst attractions	10,980	11,400	3.8%

TOP DMAS

M1 Pinehurst 2023-24 Recap Report Top City Traffic

All Website Traffic

CITY	REGION	SESSIONS ▼	% ▲	1+ Minute Conv. Rate
1. Atlanta	Georgia	8.89%	37.8% ▲	34.36%
2. Charlotte	North Carolina	7.76%	22.0% ▲	44.26%
3. Raleigh	North Carolina	4.2%	4.8% ▲	42.42%
4. New York	New York	2.32%	-42.1% ▼	32.33%
5. Southern Pines	North Carolina	1.92%	-4.2% ▼	38.90%
6. Pinehurst	North Carolina	1.91%	3.2% ▲	40.85%
7. Virginia Beach	Virginia	1.89%	30.6% ▲	40.89%
8. Washington	District of Columbia	0.95%	-34.3% ▼	41.14%
9. Greensboro	North Carolina	0.83%	5.8% ▲	41.97%
10. Chicago	Illinois	0.8%	-43.5% ▼	32.36%

Organic Traffic

CITY	REGION	SESSIONS ▼	% ▲	1+ Minute Conv. Rate
1. Atlanta	Georgia	9.13%	26.0% ▲	29.63%
2. Raleigh	North Carolina	5.27%	-2.6% ▼	30.85%
3. Pinehurst	North Carolina	4.22%	3.5% ▲	32.67%
4. Southern Pines	North Carolina	4.13%	-6.0% ▼	33.25%
5. Charlotte	North Carolina	3.84%	-3.5% ▼	30.06%
6. New York	New York	2.79%	-56.1% ▼	30.13%
7. Chicago	Illinois	1.49%	-29.9% ▼	25.48%
8. Fayetteville	North Carolina	1.05%	17.3% ▲	28.13%
9. Sanford	North Carolina	0.93%	-13.1% ▼	23.77%
10. Miami	Florida	0.77%	138.6% ▲	35.09%

Paid Ad Clicks

CITY	REGION	SESSIONS ▼	% ▲	1+ Minute Conv. Rate
1. Charlotte	North Carolina	11.01%	14.7% ▲	46.89%
2. Atlanta	Georgia	8.7%	39.9% ▲	34.18%
3. Raleigh	North Carolina	3.35%	-5.4% ▼	48.07%
4. Virginia Beach	Virginia	3.1%	20.4% ▲	41.54%
5. New York	New York	1.64%	-46.4% ▼	33.99%
6. Washington	District of Columbia	1.34%	-47.5% ▼	43.29%
7. Greensboro	North Carolina	1.09%	7.9% ▲	45.18%
8. Baltimore	Maryland	1.02%	-37.3% ▼	46.79%
9. Winston-Salem	North Carolina	0.8%	6.8% ▲	44.49%
10. Richmond	Virginia	0.69%	19.0% ▲	39.20%



WHERE DOES THE MOBILE DATA COME FROM?

- This data set comes from tracked mobile devices with location data that is collected through apps that require location data to be on to capture that information.
- Locals are defined as those that live or work with Moore County and were thus excluded from the data set. They're able to determine if mobile devices live or work there based on if their device regularly pings in an area on a consistent basis for 30 days.
- Visitors are defined as those that have devices 50 miles outside of Moore County and have spent a minimum of 1 hour in Moore County. The data presented is just 2023.
- An overnight visitor is defined as someone whose device pinged in the area prior to midnight the previous day and then pinged in the area past midnight the following day.

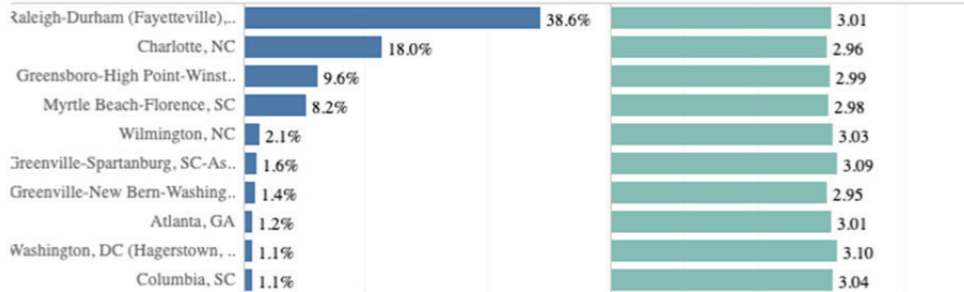


TOP 10 VISITORS BY DMA (OVERNIGHT)

- 76.5% of top overnight DMA visitors are within approximately 2.5-hour drive
- Top markets outside of those are Greenville-Spartanburg-Asheville, Atlanta, DC, and Columbia SC
- Overnight visitors stay on average 3.02 days in market
- Orlando, Nashville, Jacksonville, West Palm Beach, and Houston are markets with longer trip durations

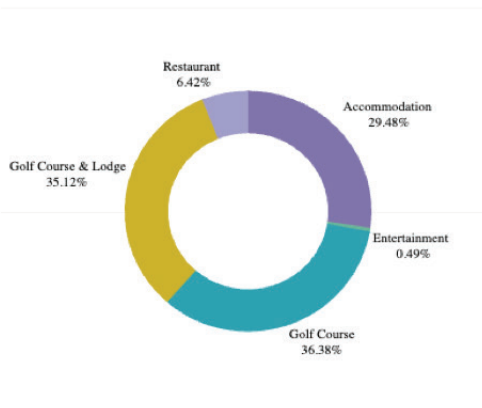
TRIPS COUNT AND AVERAGE TRIP DURATION BY DMA

Select DMA to filter the page.

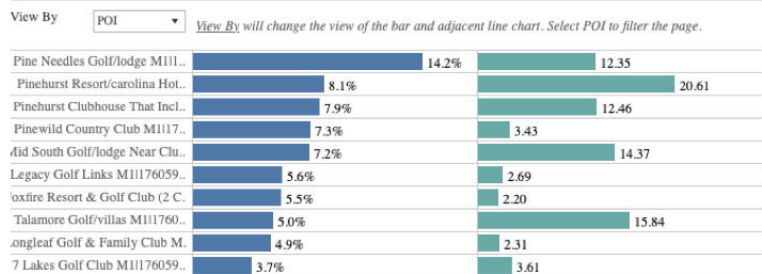


TOP POINTS OF INTEREST

- Includes both daytrips and overnight
- Top POI were golf courses, golf courses and lodging, and accommodations (of the 50 POI selected)
- In 2023 top POI were Pine Needles, Pinehurst Resort, Pinewild, and Mid South



VISITS COUNT AND AVERAGE TRIP DURATION BY POI



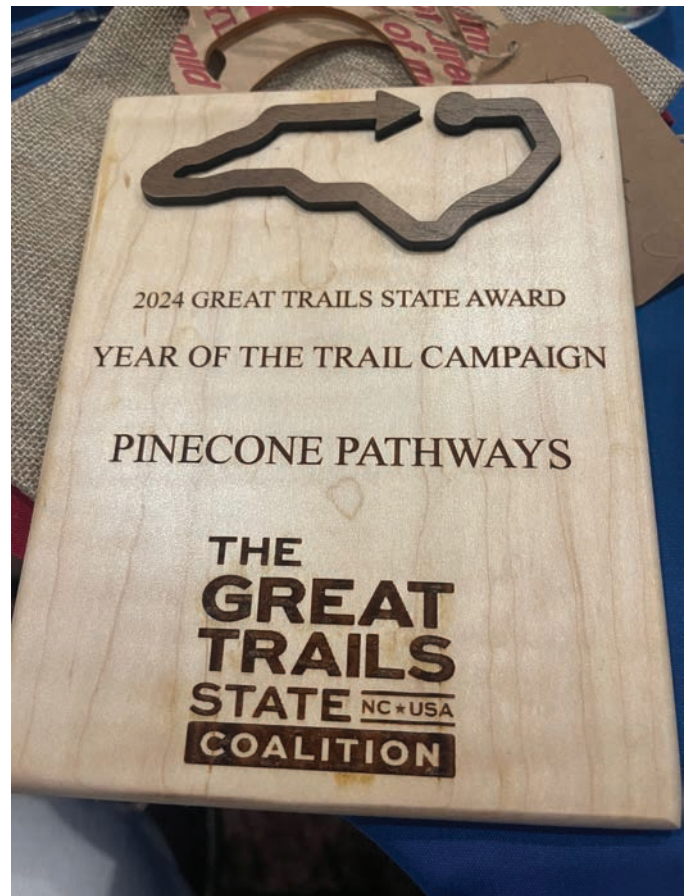
Awards and Recognition



In the midst of the CVB's efforts to promote the destination, there are opportunities where our organization is recognized for a job well done. Winning awards is an added value and a sense of pride for the CVB as it proves our unique programs and initiatives have drawn the attention of our peers in the hospitality and tourism industry. In the last year, the CVB has been honored several times by both the North Carolina Travel Industry Association (NCTIA) and the Great Trails State NC Coalition.

The CVB won the Platinum Award for Best Leisure Marketing for its "Pinecone Pathways Program," and the Gold Award for the best Community Stakeholder for its "Moore Miracles for the Holidays" campaign. According to NCTIA, more than 80 entries were submitted from destination marketing organizations from across the state for consideration among four separate categories.

Our Pinecone Pathways program was also recognized by the Great Trails State NC as one of several programs statewide that had a significant impact on tourism by enhancing and highlighting Moore County's trails and even responsible for life-changing health benefits for pinecone hunters - whether they found a glass pinecone or not.



Hurricane Helene Relief Effort



In the wake of Hurricane Helene, the CVB responded quickly to activate a major relief effort based at Moore County Airport. From September 29 through October 6, the CVB, in partnership with airport employees, staff from Tarheel Events, off duty member of U.S. Army Special Forces and dozens of volunteers, coordinated efforts becoming what many called a "mimi-FEMA" operation. An assembly line was created to intake donated items that were quickly categorized into specific-need supplies or putting together hundreds of care packages. From there, the deployment of supplies to areas of Western North Carolina most in need was quickly facilitated using large trucks and planes (flown by local pilots), with all time and transport vessels donated by local businesses, drivers and pilots. The shipments were also delivered to state-designated acceptance points in Statesville, Hickory and Concord, North Carolina for quick response aid missions into other critical need areas. Members of the U.S. Army Special Forces, active and retired, dedicated their own time to stage precision care package air drops, using exact coordinates, to people stranded in areas unreachable by vehicles.

Overall, the CVB's coordinated efforts produced the following results:

- More than 15 tons of donations were processed
- Nearly 30 truckloads of materials
- More than 10,000 pounds of hay transported
- Nearly 40 flight missions to delivery supplies
- More than 15,000 care packages prepared and delivered
- Dozens of volunteers



Paradise in the Pines Podcast



The Paradise in the Pines podcast has now reached more than 60 episodes and has been seen by more than 800,000 people. The bi-weekly podcast is produced entirely by the CVB and most shows are recorded inside the office podcast studio. The podcast can also be taken on-location with remote recording capabilities.

In the last year, the CVB recorded podcasts at the NCTIA Conference, Visit NC Offices in Raleigh and at the 2024 U.S. Open, just steps away from the championship at Pinehurst No. 2. Paradise in the Pines is about the people, places and stories that make our destination the Home of American Golf. Guests have included a cross-section of business leaders from the Moore County community and also media VIPs that frequently visit the Pinehurst area. The extremely popular podcast has been a fun and informative way to reach new audiences and tell our story.



In Memoriam



GEORGE WESLEY LITTLE

March 22, 1942 - October 11, 2024

Among numerous lifelong accomplishments, George Wesley Little was one of the founders of the Moore County Tourism Development Authority d.b.a. the Pinehurst, Southern Pines, Aberdeen Area Convention & Visitors Bureau (CVB). George was a lifelong resident of Moore County and a graduate of Southern Pines High School and later attended the University of North Carolina at Chapel Hill. After college, George returned to Southern Pines and began work in the insurance industry. He was president of George W. Little & Associates, an agency he founded in 1977.

Among the things George was most proud of was his work with Sandhills Community College (SCC) where he served on the Board of Trustees from 1981 to present and was Chairman of the Board of Trustees from 1985-2024. George spent his years at SCC working

hard to ensure SCC's success. He oversaw its growth by about 30 academic programs and five bond issues worth of construction. The latest of those projects was the construction of Foundation Hall, housing the nursing and health sciences education center. George leaves a lasting legacy at SCC, where Little Hall bears his name and countless others bear the foundations to which he either contributed or raised money - often both. George was awarded an Honorary Doctor of Law degree from Sandhills Community College, George was also a member of SCC Foundation Board. While he was on the Foundation Board, he oversaw its growth as it went from about \$500,000 to more than \$52 million. George was very proud of the many scholarships that were awarded to Sandhills students by the SCC Foundation, including the Sandhills Promise.

George served as president of the North Carolina Association of Community Colleges. He was also a board member for the National Association of Community College Trustees from 1997 to 2003, including one year as chairman and served on the N.C. Association of Community College's Executive Committee. Other accolades George received during his time at SCC include Trustee of the Year by the National Association of Community College Trustees, Outstanding Trustee for the U.S. Southern Region by the Association of Community College Trustees, and recipient of the I.E. Ready Award from the N.C. State Board of Community Colleges. In addition to his work with SCC, George also served as a trustee at UNC-Pembroke.

In 2023, the north and southbound bridges on U.S. 1 crossing N.C. 2 were dedicated to George in recognition of his civic involvement and contributions to his community.

"Our community has lost a passionate leader in George Little," said CVB Board of Directors Chairman Kelly Miller. "I view George as the "Founding Father" of the CVB and he was instrumental in the passage of the original legislation that created the county tourism authority. His support for tourism and the Moore County community as a whole made our area a better place to visit and live. Our sympathies go to his wife, Wanda, his family and many friends across the state of North Carolina. He will be greatly missed."

The Pinehurst, Southern Pines, Aberdeen Area Convention & Visitors Bureau (CVB) is the official destination marketing organization for Moore County, North Carolina. With annual visitor spending exceeding \$805 million in 2023, Moore County is the 10th highest tourism economy in North Carolina. Annual hotel occupancy tax collections in the 2023-2024 FY exceeded \$3.9 million - an all-time record for the destination.



**PINEHURST, SOUTHERN PINES, ABERDEEN AREA
CONVENTION & VISITORS BUREAU**

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