

VISIT
**PINEHURST
SOUTHERN PINES
ABERDEEN**

THE HOME OF AMERICAN GOLF

Visit
**PINEHURST
SOUTHERN PINES
ABERDEEN**
Home of American Golf

2025-2026 Annual Report

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PRESIDENT'S MESSAGE

The 2025-26 FY was another record-breaking year for tourism in Moore County. Despite coming off an enormously successful 2024 U.S. Open, Moore County still witnessed an increase in visitor spending of 4.9% to an all-time record of \$901 million. Visitor spending has increased 34% since COVID and we maintained our standing as the 10th largest tourism economy in North Carolina out of 100 counties. Our goal is to achieve \$1 billion in visitor spending as we close the decade after the 2029 U.S. Opens which will feature both men's and women's championships in consecutive weeks.

On January 1, 2026 the county lodging occupancy tax was increased to 6% which is the state maximum as we joined dozens of other counties statewide to be at that rate. The increase was enacted by the Moore County Board of Commissioners in March 2025. With the increase, the TDA now follows our legislation (House Bill 545) to spend a minimum of two-thirds of our funding on marketing the destination and one-third for tourism product development. As of October 2026, a total of \$1.7 million has been accrued for tourism product development. That sub-fund for development will remain untouched until the TDA Board of Directors can identify the large-scale or major project to fund. That said, the TDA is in the midst of a comprehensive destination market study in an effort to identify what that major project could be. Whatever that project may be, it must be one that will be a significant draw for increasing visitors to the destination. What's great about the county lodging tax is that not one Moore County resident pays this tax. It is paid by the visitors to Moore County who stay overnight in hotels and short-term rentals.

While the role of the TDA is to market the destination, we are always seeking ways to get more visitors to the Home of American Golf. With that objective in mind, we are very close to the return of commercial flight service to the Moore County Airport. We anticipate that happening by the summer of 2027 with daily direct flights to/from Dulles International Airport (IAD) in suburban Washington, D.C. It has been 20 years since commercial flight service has flown into the Pinehurst area. Our research shows there is enormous demand for this flight service and an independent third-party research effort shows 79% of those polled support the return of commercial flight service. Our partners at Moore County Economic Development Partnership (MCEDP) and the Moore County Airport are spearheading this effort. The TDA will be prepared to market the flights to ensure its success as soon as flight service is approved.

Obviously, the golf industry drives the tourism economy in Moore County. Pinehurst Resort continues to invest in the growth of the game and their property assets with the debut of Pinehurst No. 11 in March 2027. The Bill Coore/Ben Crenshaw design will join the Tom Doak work at Pinehurst No. 10 and will create a dynamic duo of courses at the Pinehurst Sandmines in Aberdeen. At the same location, the resort is building a new 26-room lodge and a large cottage with both products expected to be rolled out in 2027. Meanwhile, the Country Club of Whispering Pines has re-opened after a renovation of the Pines course by Kyle Franz. This is part of a larger purchase of CCWP and the two 18-hole courses at Foxfire by the Mid Pines Development Group. This group includes TDA board member Kelly Miller, who also own the trio of famous Donald Ross gems at Pine Needles Lodge and Golf Club, Mid Pines Golf & Lodge and Southern Pines Golf Club.



Lodging-wise, McPeake Hotels Inc. opened the Courtyard by Marriott in December 2025 and plans are for them to build a fifth hotel at their Aberdeen site soon. They have also secured an area in downtown Southern Pines for a boutique hotel, too. Two more hotels are being built behind the Homewood Suites in Pinehurst to include an AC Hotel and Residence Inn, so more hotel rooms will be online in time for the 2029 U.S. Open.

The bottom line is the tourism economy in Moore County is alive and well – and growing. It is not hyperbolic to make this statement: Moore County is one of the hottest destinations in the state. People are coming and the reason why they return is our amazing hospitality and tourism partners. We provide extraordinary experiences for our visitors and our new ad campaign reflects how we truly make people feel at home when they are here. Thank you for supporting tourism inside the Home of American Golf!

A handwritten signature in black ink that reads "Phil M. Wey". The signature is written in a cursive, flowing style.

MISSION, VISION, 5 PILLARS & CORE VALUES

MISSION

The mission of the Moore County Tourism Development Authority (a.k.a. Visit Pinehurst, Southern Pines, Aberdeen) 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 Moore County Tourism Development Authority is recognized as the authority on travel and tourism for the destination, known as The Home of American Golf. Visit Pinehurst, Southern Pines, Aberdeen is a content marketing machine with 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, Visit Pinehurst, Southern Pines, Aberdeen 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 organizations 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, an 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 Law 2015-256 permitted an act to authorize Moore County to levy the additional 3% (Total 6%) Occupancy Tax.

The Authority shall D.B.A. as the “Visit Pinehurst, Southern Pines, Aberdeen”, hereinafter members are referred to as “Board” and Moore County Tourism Development Authority as “TDA”.

As set forth in House Bill 138, Chapter 188 of the General Statutes 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 owners 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 Board of Directors and holds quarterly meetings to update the board and the public on occupancy tax collections and marketing updates.

In March 2025, the Moore County Commissioners made an historic decision to raise the county lodging occupancy tax from 3% to the state maximum of 6%, which took effect on January 1, 2026. The increase resulted in more marketing dollars for the TDA and also provided significant funding for tourism product development.



MEET THE BOARD OF DIRECTORS

The Moore County Tourism Development Authority (TDA) (a.k.a. Visit Pinehurst, Southern Pines, Aberdeen) is served by a 12-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 2025-26 FY.



ANDY HOFMANN

CVB Chair

General Manager, Pine Crest Inn

MATT HAUSER

CVB Vice Chair

General Manager, Talamore Golf Resort

PAT MOLAMPY

CVB Secretary/Treasurer

Entrepreneur

TOM PASHLEY

President

Pinehurst Resort

KELLY MILLER

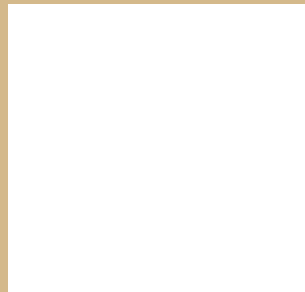
President

Ross Resorts

CHRISTA GILDER

Owner

McPeake Hotels, LLC



NICK PICERNO

Moore County Commissioner

LINDA PARSONS

President

Moore County Chamber of Commerce

WARREN LEWIS

Retired

Tourism Interest Appointee

NATALIE DEAN HAWKINS

President

Moore County Economic Development

(ex-officio)

WAYNE VEST

Moore County Manager

(ex-officio)

CAROLINE XIONG

Moore County Finance Officer

(ex-officio)



MEET THE STAFF

Visit Pinehurst, Southern Pines, Aberdeen is the official destination marketing organization for Moore County, NC. We are proud to represent a truly iconic global golf destination led by the historic Pinehurst Resort. As a tourism authority for the Home of American Golf, our primary role is to develop and implement marketing strategies that enhance the economic impact and brand value of tourism to the benefit of visitors and residents alike. In fact, based on a 2025 annual report produced by Tourism Economics for Visit North Carolina, the impact of tourism in Moore County saves each resident about \$578 per year in taxes.

With a full-time staff of three people, two part-time personnel and an external marketing professional, our staff has a collective sum of more than 75 years in the tourism industry. That experience is invaluable in creating the annual marketing plan that attracts more than 1.7 million visitors to Moore County. While golf is synonymous with the Pinehurst area, non-golf-related leisure activities, such as our vibrant dining and shopping scene, outdoor adventure, arts & culture and a burgeoning music scene, make Moore County one of the hottest destinations in North Carolina.

As we look forward to 2027, we remain optimistic about the positive impact tourism will continue to have on our area. For more information or to learn more about the TDA, please visit our office located at 155 W. New York Avenue, Suite 300, downtown Southern Pines or visit our website: homeofgolf.com. The TDA office is open Monday through Thursday 9 a.m. to 5 p.m. and Friday 9 a.m. to 2 p.m.



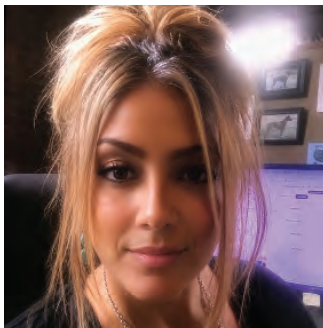
PHIL WERZ
President and CEO

Years of Service: 8
Directs and leads the Tourism and Development Authority, creates and executes the annual marketing plan and maintains budget and expenditures. Represents Visit Pinehurst, Southern Pines, Aberdeen within the Moore County community and externally, for all travel and tourism interests.



MELISSA HOLT
*Vice President,
Destination Marketing*

Years of Service: 3
Assists the President and CEO with a variety of responsibilities including destination and economic development, marketing, public relations, community engagement and staff supervision. Creates content and manages all social media channels.



LISA LONG
Creative Director

Years of Service: 21
Creates print/digital marketing materials/marketing campaigns to promote the destination. Provides direction for the design of the Destination Guide. Coordinates other marketing-related projects including the Annual Report and Destination Marketing News.



MEGAN MCDONALD
Digital Specialist

Years of Service: 2
Provides website maintenance and search engine optimization (SEO). Creates content for social media in addition to assisting with research for weekly content projects.



DONNA MURPHY
Staff Accountant

Years of Service: 9
Performs accounting functions and coordinates with Moore County Finance to maintain budget and other finance-related procedures including requisitions and billing. Oversees bulk distribution of the Destination Guide.



ZACH PESSAGNO
Photographer/Videographer

Years of Service: 2
Zach and his brother Andy are the duo behind Chasing Fowl Photography, providing golf-centric photography and videography for leading brands in the golf space. Zach works on a content basis to provide long-form videos for social media.

OVERVIEW OF 2025-2026 FY VISITOR SPENDING

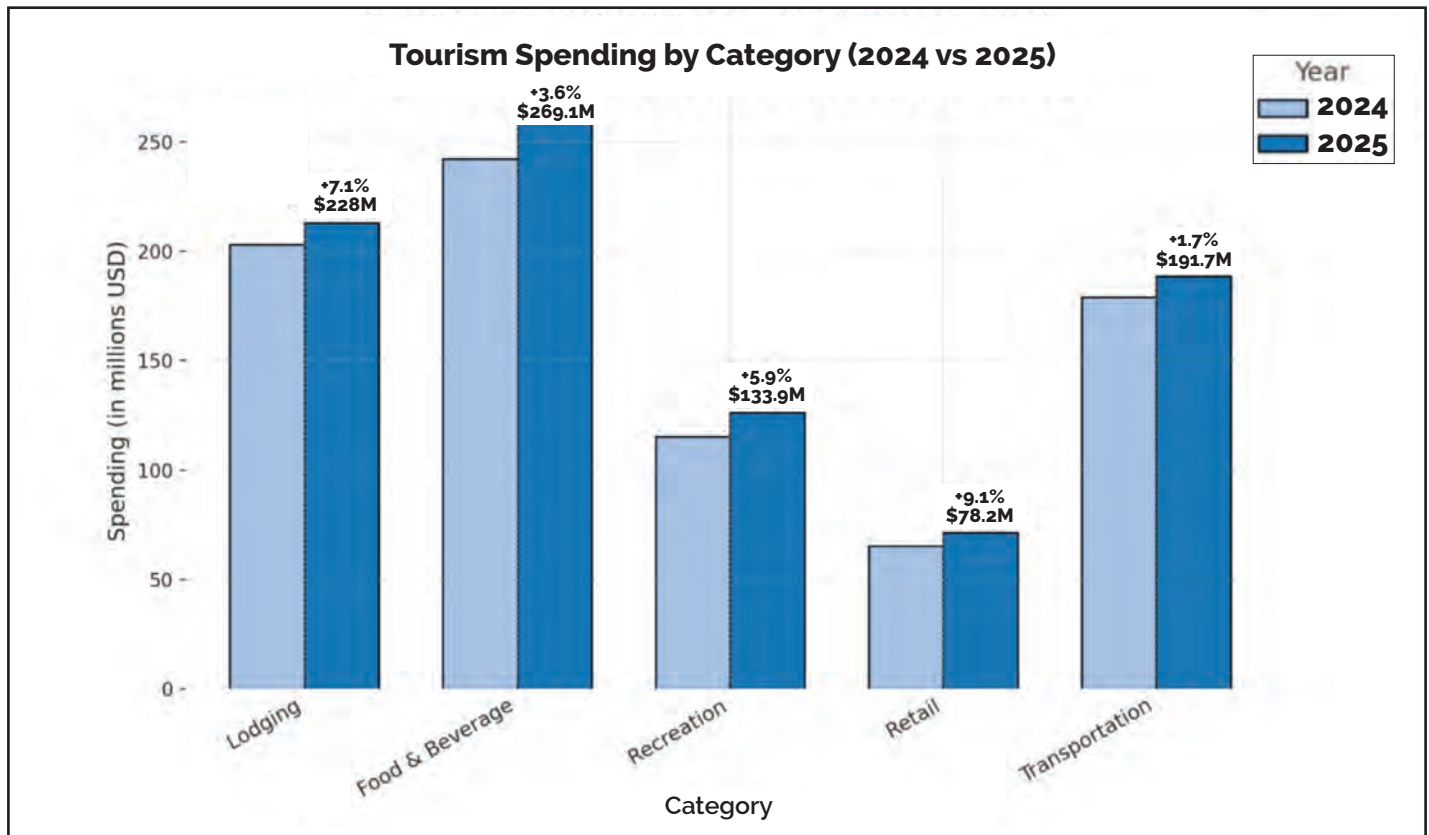
In 2025, Moore County witnessed an unprecedented \$901.4 million in economic impact from visitor spending, representing a 4.9% increase from the previous year. Moore County remains the 10th largest tourism economy in the state, maintaining its highest ranking in history. These statistics come from the Economic Impact of Travel on North Carolina Counties 2025, an annual study commissioned by Visit North Carolina, part of the Economic Development Partnership of North Carolina. The study was prepared for Visit North Carolina by Tourism Economics.

“To see this kind of increase after a very successful U.S. Open year is truly remarkable and a testament to the enormous popularity of our globally-recognized destination,” said Phil Werz, President and CEO of Visit Pinehurst, Southern Pines, Aberdeen. “With more high-quality lodging coming online in the next year or two, and being on the precipice of the return of commercial flight service to Moore County, we feel very confident that we will surpass the \$1 billion mark in visitor spending by the time this decade concludes.”

Tourism impact highlights for 2025:

- Moore County ranks 10th among 100 counties in North Carolina for annual visitor spending.
- The tourism industry employs more than 6,500 people in Moore County, an increase of 2.8% from the previous year.
- Tourism in Moore County saved each resident \$578.68 in taxes, per capita. The state average was \$241. The report also showed that \$30.1 million in local taxes was derived from visitor spending in 2025, an increase of 7.1%.
- State tax revenue generated by tourism in Moore County totaled \$34.2 million, up from \$32.2 million in 2024, an increase of 6.2%.





The report also provided visitor spending based on a variety of sectors. Overall, Moore County reports visitor spending totals for 2025 in these areas: Lodging (\$228 million, up from \$213 million in 2024, an increase of 7.1%); Food and Beverage (\$269.1 million, up from \$259.6 million in 2024, an increase of 3.6%); Recreation (\$133.9 million, up from \$126.4 million in 2024, an increase of 5.9%); Retail (\$78.2 million, up from \$71.6 million in 2024, an increase of 9.1%) and Transportation (\$191.7 million, up from \$188.5 million in 2024, an increase of 1.7%).

“As much as we’d love to see growth in all 100 counties, the study confirms the vitality of North Carolina’s tourism economy,” said Wit Tuttell, executive director of Visit NC. “As we approach the two-year milestone of Hurricane Helene, we can draw inspiration from the mountain communities that have experienced a turnaround as we continue the effort to see every destination reach higher ground.”

Statewide, overall visitor spending in 2025 rose 1.3% to reach a record \$37.2 billion compared to the previous year. Fifty-nine percent of counties experienced increases in visitor spending from 2024 to 2025 with 14 percent recording flat performance.

Other Statewide Highlights:

- Domestic travelers spent a record \$36.1 billion in 2025. Spending was up 1.5% from the \$35.6 billion in 2024.
- International travelers spent \$1.1 billion in 2025, down 2.8% from the previous year.
- Visitors to North Carolina generated more than \$4.7 billion in federal, state, and local taxes in 2025. The total represents a 2.5% increase from 2024.
- State tax receipts from visitor spending rose 2.0% to nearly \$1.4 billion in 2025.
- Local tax receipts grew 2.6% to nearly \$1.3 billion.
- Direct tourism employment in North Carolina increased 0.3% to 230,997.
- Direct tourism payroll increased 3.5% to \$9.8 billion.
- Visitors spend more than \$101 million per day in North Carolina. That spending adds \$7.5 million per day to state and local tax revenues (about \$3.8 million in state taxes and \$3.7 million in local taxes).
- Each North Carolina household saved \$605 on average in state and local taxes as a direct result of visitor spending in the state. Savings per capita averaged \$244.

2025-2026 FY FINANCIAL REVIEW

The chart below reflects county lodging occupancy tax collections by month from 2020-21 FY through the 2025-26 FY. NOTE: The Moore County Board of Commissioners approved an increase of that visitor tax (does not impact residents) from 3% to 6% in March 2025. This explains the substantial increases year-over-year starting in January 2026 which also impacted the final collections sum for the 2025-26 FY. This chart also shows the rate of growth and momentum created in the destination since the COVID epidemic. Given the recent occupancy tax increase, collections have increased 181% since the 2020-21 FY.

	2020-2021	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026
JULY	\$ 150,988.63	\$ 258,286.11	\$ 258,430.89	279,598.46	301,990.03	\$ 308,388.27
AUG	\$ 151,873.32	\$ 257,338.05	\$ 275,421.88	283,450.93	282,050.42	\$ 317,931.59
SEPT	\$ 173,463.29	\$ 280,224.10	\$ 307,583.71	356,438.59	364,766.13	\$ 417,805.55
OCT	\$ 233,743.42	\$ 329,822.71	\$ 376,424.29	403,256.58	475,884.96	\$ 487,871.98
NOV	\$ 143,377.99	\$ 212,632.70	\$ 223,864.61	257,590.67	284,604.31	\$ 312,452.24
DEC	\$ 68,833.92	\$ 117,038.43	\$ 118,435.85	142,130.15	163,845.59	\$ 187,954.51
JAN	\$ 88,933.77	\$ 118,133.78	\$ 122,980.10	144,462.96	132,151.03	\$ 265,571.52
FEB	\$ 97,277.89	\$ 143,712.92	\$ 167,078.56	193,059.02	192,498.65	\$ 416,781.44
MARCH	\$ 200,060.42	\$ 287,151.41	\$ 298,227.28	287,215.57	341,350.26	\$ 743,759.03
APRIL	\$ 296,819.34	\$ 382,505.57	\$ 397,479.44	492,677.60	457,068.96	\$ 995,769.12
MAY	\$ 308,388.34	\$ 365,073.43	\$ 367,700.19	367,266.05	455,466.54	\$ 966,264.02
JUNE	\$ 279,976.78	\$ 300,716.55	\$ 319,848.25	726,054.64	326,657.05	\$ 739,572.16
Gross Room Occupancy Tax	\$2,193,737.11	\$3,052,635.76	\$ 3,233,475.05	\$3,933,201.22	\$ 3,778,333.93	\$ 6,160,121.43
Fees	\$ (31,937.37)	\$ (40,526.36)	\$ (42,334.75)	\$ (49,332.01)	\$ (47,784.31)	\$ (71,601.16)
Net Room Occupancy Tax	\$2,161,799.74	\$3,012,109.40	\$ 3,191,140.30	\$3,883,869.21	\$ 3,730,549.62	\$ 6,088,520.27

Starting in the 2025-26 FY, the TDA requested that the county finance office provide collections in specific groupings. Tourism bureaus, by law, are not permitted to have access to occupancy tax collections by individual properties, but providing the data via groupings as suggested is permitted. The chart showing collections by property type allows us to gauge where visitors are staying depending on the four categories listed which also includes short-term rentals (STRs) as they also are required to submit 6% occupancy tax to the county.

With the occupancy tax increase, the TDA follows our legislative mandate to annually spend a minimum of two-thirds of our funding on marketing the destination, and the other one-third can be used for tourism product development. Based on that formula, and with the increase of the occupancy to 6% as of Jan. 1, 2026, a total of \$1.3M has been set aside for the tourism product development sub-fund as of the last day of the 2025-26 FY, June 30, 2026.

LISTING BY TYPE	2025-26FY TOTAL COLLECTIONS	PERCENT BY TYPE
RESORTS	\$3,246,097.31	52.80%
PREMIER SELECT SERVICE HOTELS	\$1,036,489.24	16.80%
ALL OTHER HOTELS	\$373,600.83	6.10%
SHORT TERM RENTALS	\$1,493,660.63	24.30%

2025 ECONOMIC IMPACT OF VISITOR SPENDING IN MOORE COUNTY

2025 Visitor Spending in Moore County grew to \$901 Million - An All-Time Record

In 2025, visitor spending in Moore County grew 4.9% to \$901 million. This figure represents our being the 10th largest tourism economy in North Carolina. While we are a golf-based economy, the visitor spending figures also represent other categories such as lodging, transportation, food and beverage, retail and recreation, as well as other businesses. The tourism/hospitality industry employs more than 6,500 people in Moore County, which is the second highest employment sector behind healthcare. Tourism also directly impacts the quality of life for all county residents, as the impact of the industry saves each resident \$578 a year in taxes.



**Daily Visitor
Spending**

\$2.47 Million
+120k per day from 2024



**Total Visitor
Spending**

\$901 Million
+4.9% from 2024



**Tourism Industry
Employment**

6,500
+2.8% from 2024



**Overnight
Visitors**

\$228 Million
+7.1% from 2024



**Taxes Paid
by Visitors**

**\$64.4 Million includes
\$30.1 Million in local taxes
+7.1% in state and local
taxes from 2024**



**Tourism Economy
Rank**

**10th Largest in
North Carolina**

MEDIA PARTNERSHIPS

Consistent, positive and ongoing relationships with key media partnerships allow the TDA to achieve earned media placements throughout the year. Along with strategic paid advertorials and editorials, these media opportunities provide the avenue for the TDA 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. These mostly digital placements are responsible for more than 32 million impressions across all media partnerships.



PARTNERSHIP MARKETING

Partnership Marketing is an annual and vital part of the marketing plan for the TDA. In 2026, we worked with recognized consumer brands GoPro, Maui Jim and BruMate. These partnerships allow us to leverage these brands and expose our destination to literally millions of their loyal consumers. These programs also are key for data collection as the exposure typically includes contests or sweepstakes that encourage consumers to opt-in to receive messages from us. With more than 200,000 opt-in subscribers to our database as of 2026, these are valuable assets which allow us to expand our marketing reach and convert interested consumers into visitors to the destination. These partnerships also include content creation inside the destination where the partner companies visit us and leverage their channels.



EVENT MANAGEMENT



Pinecone Pathways Program (Spring)

Held each year for a five-week period from the first day of spring until Earth Day, the Pinecone Pathways Program has become a viral sensation in Moore County since it started in 2022. The TDA partners with glassmakers from Starworks in Star, NC to produce 100 colorful glass pinecones each spring. The pinecones are hidden along trails throughout Moore County. The annual campaign has garnered media awareness for Moore County and is responsible for people visiting from a number of states including North Carolina, South Carolina, Virginia, Georgia, Tennessee, Ohio, Pennsylvania and even as far away as Colorado.

Sandhills Motoring Expo (May)

The annual Sandhills Motoring Expo takes place every Memorial Day weekend in Pinehurst, celebrating 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.



Peach Week (July)

The TDA created Peach Week in 2023 and is an extension of the annual N.C. Peach Festival in Candor. We partner with Moore County peach farmers to provide their annual harvests with numerous area restaurants (more than 35 in 2026), so they can be incorporated into a variety of menu items. Peach

Week participants are encouraged to visit as many participating restaurants as possible to vote on their favorite dishes in a variety of categories. Other Peach Week events include a 5K Fun Run with First Health Fitness, Peach Night with the Sandhills Bogeys baseball team, Peach-A-Palooza at James Creek Cider House and Peachgrass Festival at the Weymouth Center for the Arts and Humanities, among other Peach Week events.

U.S. Kids Golf World Championships (July/August)

The annual U.S. Kids Golf World Championships 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 countries descending upon the destination for championships played at numerous golf courses throughout the Sandhills, including at Pinehurst Resort.



EVENT MANAGEMENT



Pinehurst Barbecue Festival (Labor Day Weekend)

This event has quickly become one of the top barbecue events in North Carolina, according to Our State magazine. A Celebration of Taste and Tradition, the Pinehurst Barbecue Festival is a three-day event capped off by the Sunday Pitmasters Invitational in the scenic Village of Pinehurst where seven pitmasters offer unique tastings and savory side dishes. The weekend event also offers a Q-School BBQ class, Bourbon & Bites event and more.

Great Trails State Day (Third Saturday in October)

Great Trails State Day is recognized by the state of North Carolina and observed every third Saturday in October. In Moore County, the date is celebrated by the hiding of numerous pottery pinecones on announced trails throughout Moore County. The pottery pinecones are made each year by Seagrove potter Crystal King and each year she creates them in a different color. Each pottery pinecone is numbered and engraved by Crystal King, so hunters can try to collect the next in the series each year.



Sandhills Garden of Lights (November - January)

Starting in 2026, in partnership with Sandhills Community College, the TDA stages the annual Sandhills Garden of Lights. Located at the Sandhills Horticultural Gardens in Pinehurst, more than one million lights illuminate 17 acres of grounds featuring immersive holiday scenes and interactive fun for families and visitors of all ages. It is the largest holiday light display ever presented in the Sandhills of North Carolina.

SOCIAL MEDIA INFLUENCER IMPACT

In 2025-26, the TDA hosted more than three dozen social media influencers with a collective following of more than 10 million people. These influencers were a combination of golf and non-golf leisure in focus and either highlighted areas of the destination or experienced a certain event in Moore County. Posts and videos are shared via a variety of social media platforms including Facebook, Instagram, X, YouTube and TikTok.

Visit Pinehurst, Southern Pines, Aberdeen will continue to include social media influencers as part of its annual marketing strategy and will continue to seek out the best and emerging ones to invite to the destination. Most of the influencers we host have a minimum of 100,000 followers and in most cases significantly more. This exposure is extremely valuable and continues to provide a significant return on investment for our marketing dollars.



SOCIAL MEDIA INFLUENCER IMPACT



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RESEARCH HIGHLIGHTS

The Moore County Tourism Development Authority (TDA) coordinates with MediaOne for all research metrics and visitor data collection. Solid data from visitation, segmentation, demographics and other KPI information is extremely important to the TDA and plays a major role in guiding marketing strategies and tactics. This allows the TDA to make the best use of the visitor occupancy tax dollars which fuel our annual budget. Our goal is to reach the consumer with the proper messaging in the decision-making process, so they can understand the value of the getaway to the Pinehurst area whether for golf or non-golf pursuits. The TDA places a very heavy value on content creation, so our social media platforms, YouTube channel, new website and other communication tools are vital assets that we track daily with MediaOne to ensure we are constantly top of mind for the traveler.



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**PINEHURST
SOUTHERN PINES
ABERDEEN**
Home of American Golf™

Executive Summary

Even through a complete website overhaul, total traffic grew 36% and organic traffic rose 4%. Optimization all year favored quality over quantity, and 1-minute session rates climbed across nearly every tactic.

Meta was the standout, tripling outbound clicks to partners. Premium CTV grew into a core awareness channel with a 99% completion rate across Netflix, Hulu and more.

Total Sessions
968,587

▲ +35.9% YoY

Outbound Clicks to Partners
84,824

▲ +15.9% YoY

Meta Outbound Clicks
9,935

▲ +313% YoY

CTV Completed Views
2.74M

▲ 98.9% completed views

INSIGHT

Engagement drove the year: 1-minute session rates on M1 traffic climbed 32%, and outbound clicks to partners rose 16%, with Meta outbound clicks up 313%.

Website Traffic Overview

Total Sessions
968,587

▲ +35.9% YoY

M1 1-Minute Session Rate
+32%

▲ YoY quality improvement

Organic Sessions
99,806

▲ +4.4% YoY



The green December–January peak reflects the GoPro sweepstakes campaign, which drove 120K+ landing-page sessions on its own.

Engagement & On-Site Goals

Outbound Clicks to Partners

84.8K

▲ +15.9% YoY

Full-Page Scrolls

205.0K

▲ +33.8% YoY

Visitor Guide Requests

6,297

▲ +5.8% YoY

Social Link Clicks

17.4K

▲ +13.0% YoY

Top partner destinations · outbound clicks

pinehurst.com	1,406 · ▲ +34.8%
WRAL Pinehurst Cam	1,140 · ▲ +146%
Legacy Golf Links	1,109 · ▲ +45.3%
Bed & Breakfast Golf Package	1,053 · ▲ +232%
The Carolina Hotel	883 · ▲ +177%
Talamore Golf Resort	707 · ▲ +28.3%

Packages & Deals

Outbound Clicks

14,155

Clicks from Lodging

Page
3,397

▲ +87.1% YoY

INSIGHT

Every engagement goal grew, and the clicks leaving the site went straight to bookable partners: lodging, packages and area courses.

Paid Search

Google

41.1%

▲ 1-min rate +18.4%

9.79%

▲ CTR +13.2%

74,064 tracked clicks

Bing

53.3%

▲ 1-min rate +27.2%

2.85%

▲ CTR +145%

27,208 tracked clicks

INSIGHT

Bing's 53% 1-minute rate now beats even Google Organic (42%), proof the quality-first optimization worked.

Top-performing keywords

pinehurst golf course	3,998 clicks · 11.1% CTR
pinehurst resort	3,280 clicks · 17.5% CTR
golf courses	2,495 clicks · 5.1% CTR
nc festivals and events	2,439 clicks · 15.6% CTR
things to do in pinehurst nc	1,989 clicks · 19.4% CTR
calendar of events	1,911 clicks · 4.0% CTR
couples getaway north carolina	1,560 clicks · 4.3% CTR
things to do in raleigh this weekend	1,311 clicks · 6.4% CTR

Meta Delivered on Every Front

Impressions
18.7M

▲ +14.5%

Tracked Clicks
124.1K

▲ +171%

Outbound Link
Clicks
9,935

▲ +313%

Post Reactions
17,539

▲ +99%

Top 5 Creatives

1



Dogwood Course

32,593 clicks

2.1% CTR · 1.5M Impressions

2



Essential Eats

19,878 clicks

1.9% CTR · 1.1M Impressions

3



Weymouth Center

13,284 clicks

1.3% CTR · 1.0M Impressions

4



Cradle Sunset

11,062 clicks

3.2M Impressions, top reach

5



Top 100 NC Golf

9,433 clicks

0.4% CTR · 2.3M Impressions

Native & Display

Native

48.6%

▲ 1-min rate +40.6%

10,228

▲ Outbound clicks +145%

178,759 tracked clicks

Display Retargeting

9.7M

Impressions delivered

Awareness-focused

This year's carousel and animated HTML5 creative kept retargeted travelers surrounded by the destination, a deliberate shift toward richer, awareness-first formats.

Top Content Activation placements

/a-cultural-gem-in-southern-pines 20,696 clicks · 84.6% 1-min rate

/tee-time-to-tranquility 22,579 clicks · 31.2% 1-min rate

/pinecone-pathways 13,629 clicks · 88.6% 1-min rate

/twinkling-traditions 15,415 clicks · 56.8% 1-min rate

/must-visit-boutiques-in-aberdeen... 7,991 clicks · 27.8% 1-min rate

/blog/top-100-nc-golf-courses 7,979 clicks · 49.4% 1-min rate

INSIGHT

Content Activation stories about Southern Pines and Aberdeen earned the deepest engagement on the site.

Video: YouTube & Premium CTV

YouTube Views

2.20M

▲ ~150K hrs watched

YouTube Impressions

4.34M

▲ +15.9%

CTV Completed Views

2.74M

▲ 98.9% completion

CTV views by platform



Most-watched YouTube videos

1	Pinehurst, NC is the Home of American Golf	542,191	68.8% view rate
2	GoPro x The Home of American Golf - 15s	254,705	69.4% view rate
3	A Season of Upgrades in the Home of American Golf	187,359	905K impressions
4	Visit Pinehurst / Moore County, NC	172,445	66.3% view rate
5	The Life & Legacy of Payne Stewart - World Golf Hall of Fame	166,146	41.4% view rate

Email

Emails Delivered

2.04M

▲ +22.2% YoY

Unique Opens

386.1K

▲ 18.94% open rate

Click-to-Open Rate

15.4%

▲ +170% YoY

Sessions from Email

17,120

▲ +23.7% YoY

1-Minute Session Rate

37.3%

▲ +38.0% YoY

INSIGHT

The list keeps growing without diluting quality: open rate, CTOR and 1-minute engagement all held strong across 24 sends.

Sweepstakes Partnerships

GoPro Partnership		BruMate / Hobie Partnership	
Nov 2025 – Jan 2026		Apr – May 2026	
57,129	119.9K	74,888	162.1K
Total entries	Landing page visits	Total entries	Landing page visits
2.8M	6,913	11.4M	8,871
Impressions	Newsletter opt-ins	Impressions	Newsletter opt-ins
A quick pivot into Meta paid off: nearly 7.5K entries came directly from Facebook & Instagram, while YouTube added 276K completed views of buzz.		A multi-destination collaboration with Haywood County and Newnan-Coweta. Meta drove nearly 20K entries plus 40K+ platform engagements.	

INSIGHT 132K combined entries and 15.8K new newsletter opt-ins now feed the monthly email program, owned audience the destination keeps.

Where Visitors Come From

Charlotte		Durham		Greensboro		Raleigh	
North Carolina		North Carolina		North Carolina		North Carolina	
54,859		8,018		7,550		42,109	
▲ +28.1% YoY		▲ +74.9% YoY		▲ +75.3% YoY		▲ +28.4% YoY	
New York		Fayetteville		Pinehurst		Southern Pines	
New York		North Carolina		North Carolina - local		North Carolina - local	
22,559		10,803		10,505		7,583	
▲ +51.0% YoY		▲ +146% YoY		▲ +26.1% YoY		▲ +0.8% YoY	

Foot Traffic & Economic Impact

Ad-Exposed Visitors Tracked

34,547

Visitor Daily Spend

\$130.22

Est. Hotel Nights

5,549

Est. Ad-Exposed Visitor Spend

\$10.9M

plus \$813,620 in estimated hotel revenue

Origin Market	Impressions	% of Total	Visit Conv. Rate
● Charlotte, NC	1,799,269	31.7%	1.3%
● Norfolk–Newport News, VA	590,296	10.4%	0.2%
● Greenville–Spartanburg, SC	516,509	9.1%	0.7%
● Wilmington, NC	431,370	7.6%	1.7%
● Greensboro–Winston-Salem, NC	414,343	7.3%	1.1%
● Raleigh-Durham, NC	119,194	2.1%	2.5%

Golf creative converted viewers to visitors at 1.06% vs. 0.66% for leisure. Raleigh-Durham shows the strongest visit conversion of any market.



OCCUPANCY TAX COLLECTION



Funding for the TDA is 100% fueled by the county lodging occupancy tax. These collections are paid by all lodging operators (hotels, B&B, short-term rentals and other lodging entities) on a monthly basis and remitted to the Moore County Finance Department for processing. The county takes a small fee from the monthly collections for processing and the rest is provided to the TDA. The TDA is operated based on legislation approved by the N.C. General Assembly and states that a minimum of two-thirds of our budget be spent on destination marketing while one-third may be used for tourism product development. With the official increase of the county occupancy tax by the Moore County Board of Commissioners which took effect on Jan. 1, 2026, the TDA now follows a true two-thirds/one-third separation of occupancy tax dollars. The chart on this page shows the full occupancy tax collections provided to the TDA. This data is a matter of public record and any citizen has access to this data via the TDA or the Moore County Finance office.

OCCUPANCY TAX COLLECTIONS (LAST 5 FYs)

	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026
JULY	\$ 258,286.11	\$ 258,430.89	279,598.46	301,990.03	\$ 308,388.27
AUG	\$ 257,338.05	\$ 275,421.88	283,450.93	282,050.42	\$ 317,931.59
SEPT	\$ 280,224.10	\$ 307,583.71	356,438.59	364,766.13	\$ 417,805.55
OCT	\$ 329,822.71	\$ 376,424.29	403,256.58	475,884.96	\$ 487,871.98
NOV	\$ 212,632.70	\$ 223,864.61	257,590.67	284,604.31	\$ 312,452.24
DEC	\$ 117,038.43	\$ 118,435.85	142,130.15	163,845.59	\$ 187,954.51
JAN	\$ 118,133.78	\$ 122,980.10	144,462.96	132,151.03	\$ 265,571.52
FEB	\$ 143,712.92	\$ 167,078.56	193,059.02	192,498.65	\$ 416,781.44
MARCH	\$ 287,151.41	\$ 298,227.28	287,215.57	341,350.26	\$ 743,759.03
APRIL	\$ 382,505.57	\$ 397,479.44	492,677.60	457,068.96	\$ 995,769.12
MAY	\$ 365,073.43	\$ 367,700.19	367,266.05	455,466.54	\$ 966,264.02
JUNE	\$ 300,716.55	\$ 319,848.25	726,054.64	326,657.05	\$ 739,572.16
Gross Room Occupancy Tax	\$ 3,052,635.76	\$ 3,233,475.05	\$ 3,933,201.22	\$ 3,778,333.93	\$ 6,160,121.43
Fees	\$ (40,526.36)	\$ (42,334.75)	\$ (49,332.01)	\$ (47,784.31)	\$ (71,601.16)
Net Room Occupancy Tax	\$ 3,012,109.40	\$ 3,191,140.30	\$ 3,883,869.21	\$ 3,730,549.62	\$ 6,088,520.27

PARADISE IN THE PINES PODCAST



The Paradise in the Pines podcast is produced exclusively by the TDA and showcases the people, places and stories that make our destination the Home of American Golf. The podcast is in its fourth year and is approaching 100 episodes which are posted via our social media platforms and found on our YouTube channel (Home of American Golf). The podcast is recorded at the TDA office in Southern Pines and hosted by President and CEO Phil Werz. The podcasts are snackable and each episode runs about 30 minutes in length. The podcast can be found wherever you download podcasts, including Spotify. Paradise in the Pines has been recognized by the North Carolina Tourism Industry Association (NCTIA) at its annual awards banquet.



HOME OF AMERICAN GOLF CUP

From June 7-10, 2026, Visit Pinehurst, Southern Pines, Aberdeen staged the inaugural Home of American Golf Cup. A total of 12 of the best golf content producers and social media influencers in the U.S. and Canada came to the Pinehurst area to compete for the championship. While the Creators Cup concept has taken the golf world by storm in recent years, this event was the very first one ever that required all the creators to assemble a team composed of four of their actual online followers. The followers paid to participate which supported our lodging and golf partners at Pinehurst Resort, Pine Needles Lodge & Golf Club and Talamore Resort. The competition was played at Pine Needles, Mid South Club and concluded on Pinehurst No. 10. Competitors (followers) came from the United States, Canada and Mexico, making the event truly an international one in scope. With all creators and their followers posting content during and for weeks after the event, the benefit included exposure via multiple social media channels totaling millions of followers, millions of impressions and enormous exposure for the destination.



The second annual Home of American Golf Cup will be held from June 6-9, 2027 and will be played at Pine Needles, Mid South Club and the new Pinehurst No. 11.





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