



## April 2010

Strategic tourism marketing and policy decisions depend on accurate, consistent tracking of business indicators such as lodging statistics, attraction and welcome center visitation, transportation statistics and more. The intent of the North Carolina Travel Tracker is to provide up-to-date and relevant tourism indicators for both the state and individual regions within the state. With data from the Travel Tracker, program areas and industry partners can strategically plan, implement and evaluate processes and programs.

The following report analyzes a variety of tourism indicators by 1) State, 2) the three geographic marketing regions (coastal, piedmont and mountain), and for some indicators 3) the seven economic development regions. As well as providing a review of the current state of business, the report provides a year-to-date analysis and comparisons to previous years where applicable.

With regards to the lodging data found in this report; while virtually every chain in the United States provides Smith Travel Research (STR) with data on almost all of their properties, there are still some hotels that don't submit data. However, every year STR examines listings and directories for information on hotels that don't provide data. STR calls each hotel in the database every year to obtain "published" rates for multiple categories. Based on this information all hotels are grouped - those that report data and those that don't - into groupings based off of price level and geographic proximity. They then estimate the non-respondents based on nearby hotels with similar price levels.

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## Section 1: Statewide Tourism Indicator Analysis for April 2010

Chart 1 – Hotel/Motel Occupancy in North Carolina - April 2006 – 2010

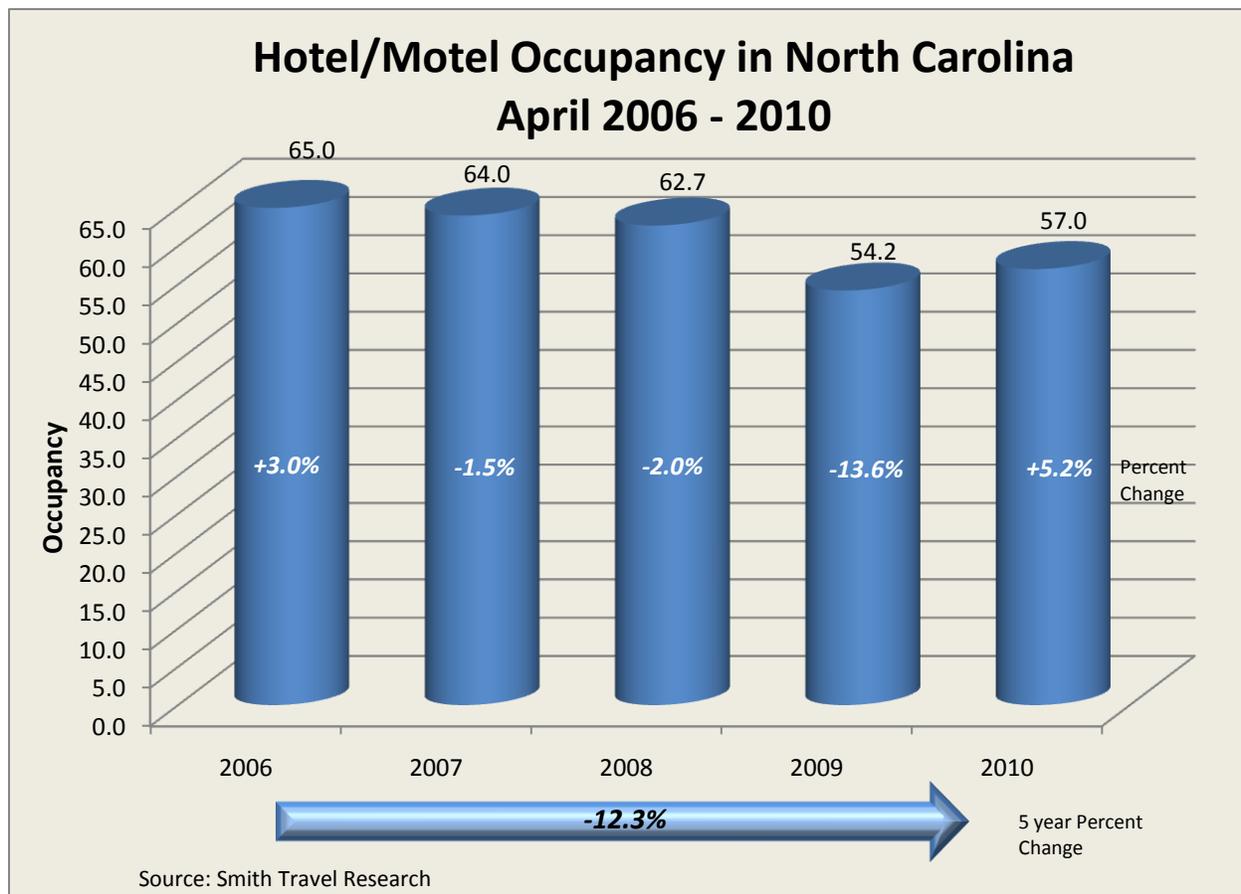


Chart 1 provides a comparison over a five year period to show the trend of occupancy in the state for the month of April. Occupancy for April 2010 was up 5.2 percent from April 2009. This followed a (relatively) good March, hopefully continuing a trend of positive occupancy data the foreseeable future. *Occupancy at the national level increase by almost five percent (+4.7%) in April 2010 from the previous year.*

Chart 2 – Hotel/Motel Average Daily Room Rate in North Carolina - April 2006 – 2010

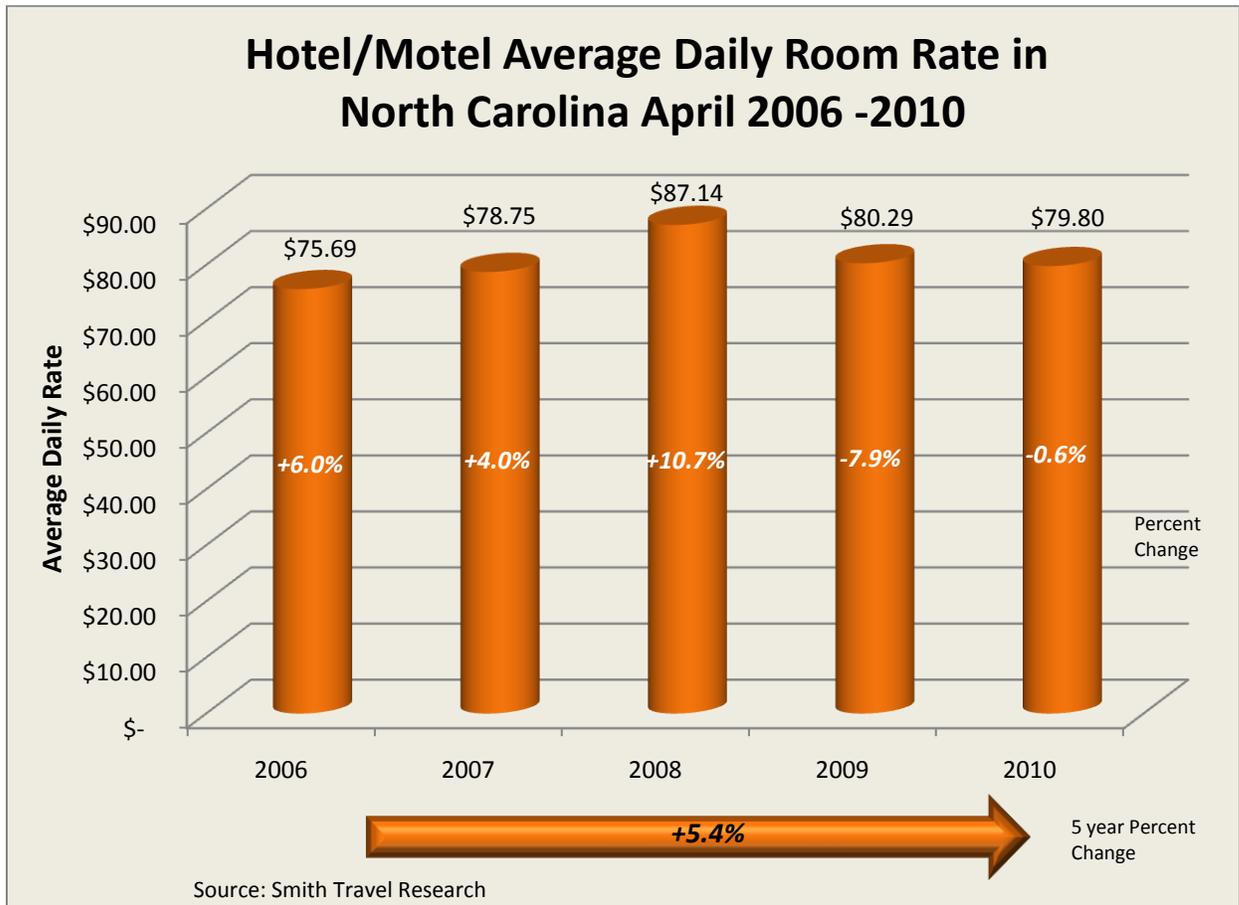
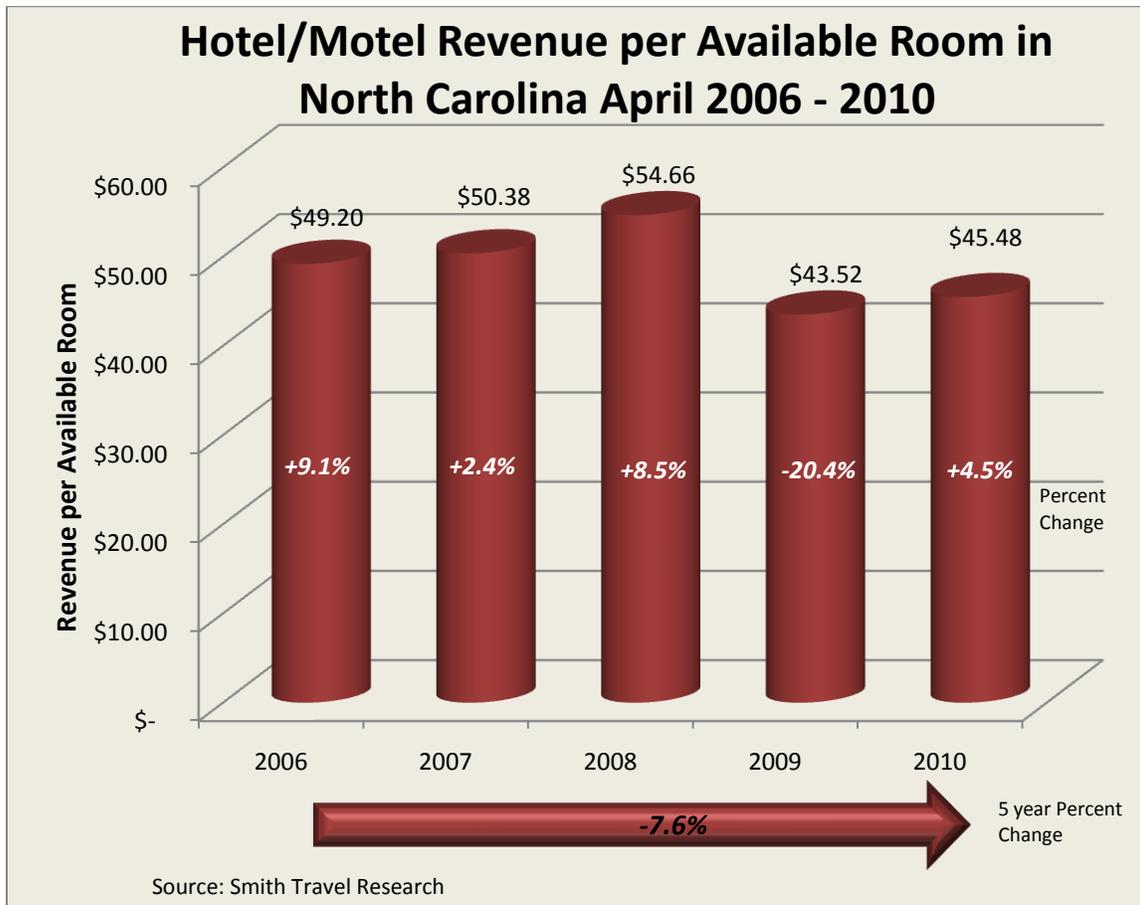


Chart 2 provides a comparison over a five year period to show the trend of average daily room rate (ADR) in the state for the month of April. After peaking in April 2008, ADR for past two years has decreased over 7 percent, however is still just above 2007 levels. ADR at the national level was down -1.2% in April 2010 from the previous April.

Chart 3 – Hotel/Motel Revenue per Available Room in North Carolina - April 2006 – 2010



In Chart 3 an analysis of Revenue per Available Room (RevPAR) is provided. RevPAR is an industry term that describes the revenue that a hotel earns on the basis of just the rooms available for a given night. In other words, rooms not available either due to renovation or other reasons are not included in this equation. Mathematically, RevPAR can be determined dividing total room revenue by rooms available (occupancy times average room rate will closely approximate RevPAR).

As with previous charts, Chart 3 shows a comparison over a five year period to show the trend of RevPAR in the state for the month of April. RevPAR was up in April 2010, continuing the positive growth that started last month. *RevPAR at the national level was up 3.5% in April 2010 from the previous April.*

Chart 4 – Hotel/Motel Room Demand in North Carolina – April 2006 – 2010

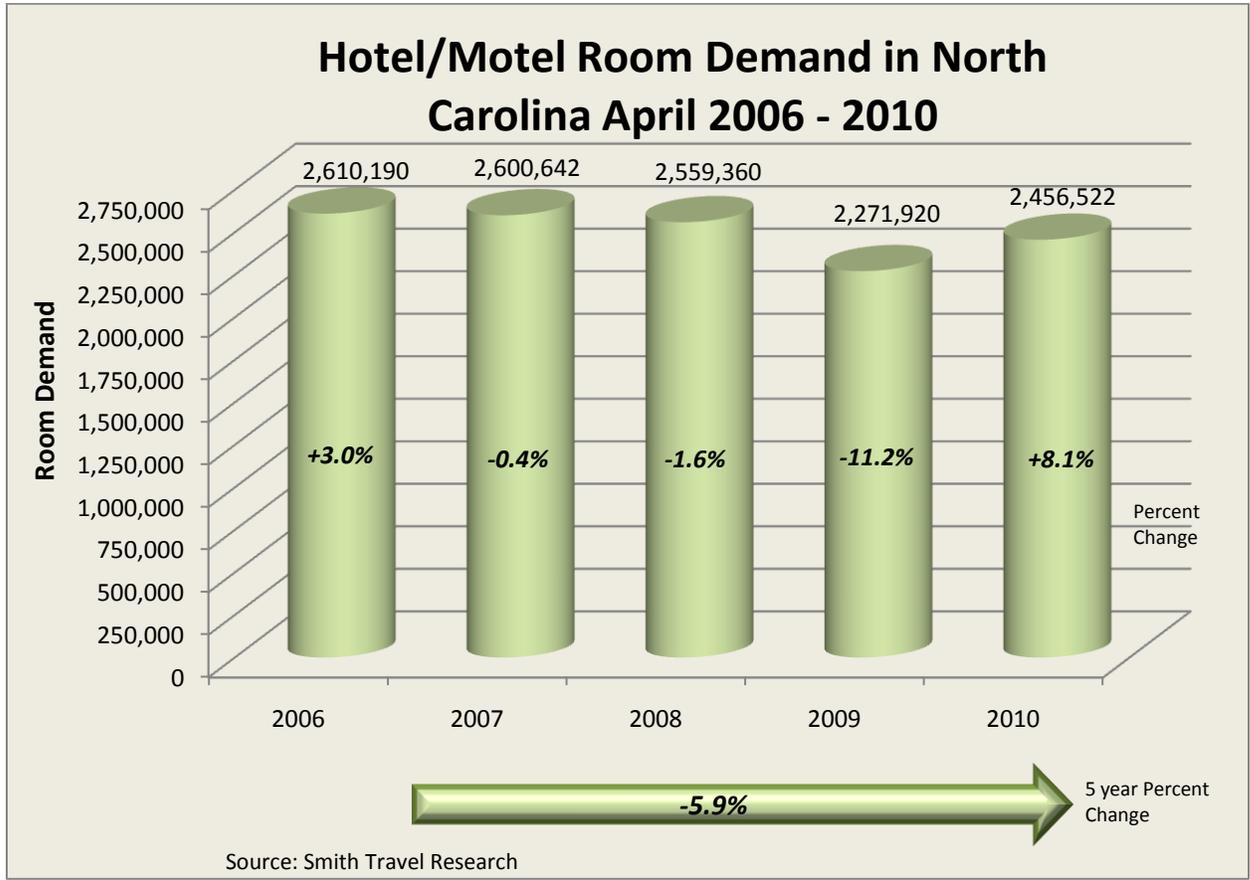


Chart 4 depicts hotel/motel demand for the month of April 2010 with comparisons to the previous four years. Demand is the number of rooms sold excluding complimentary rooms. Room demand for April was up 8.1% from April 2009, though is still down from 2008. *Room Demand at the national level saw an increase of 7.3% change in April 2010 from the previous April.*

Chart 5 – North Carolina Lodging Statistics Monthly Percent Change 2008 – 2010

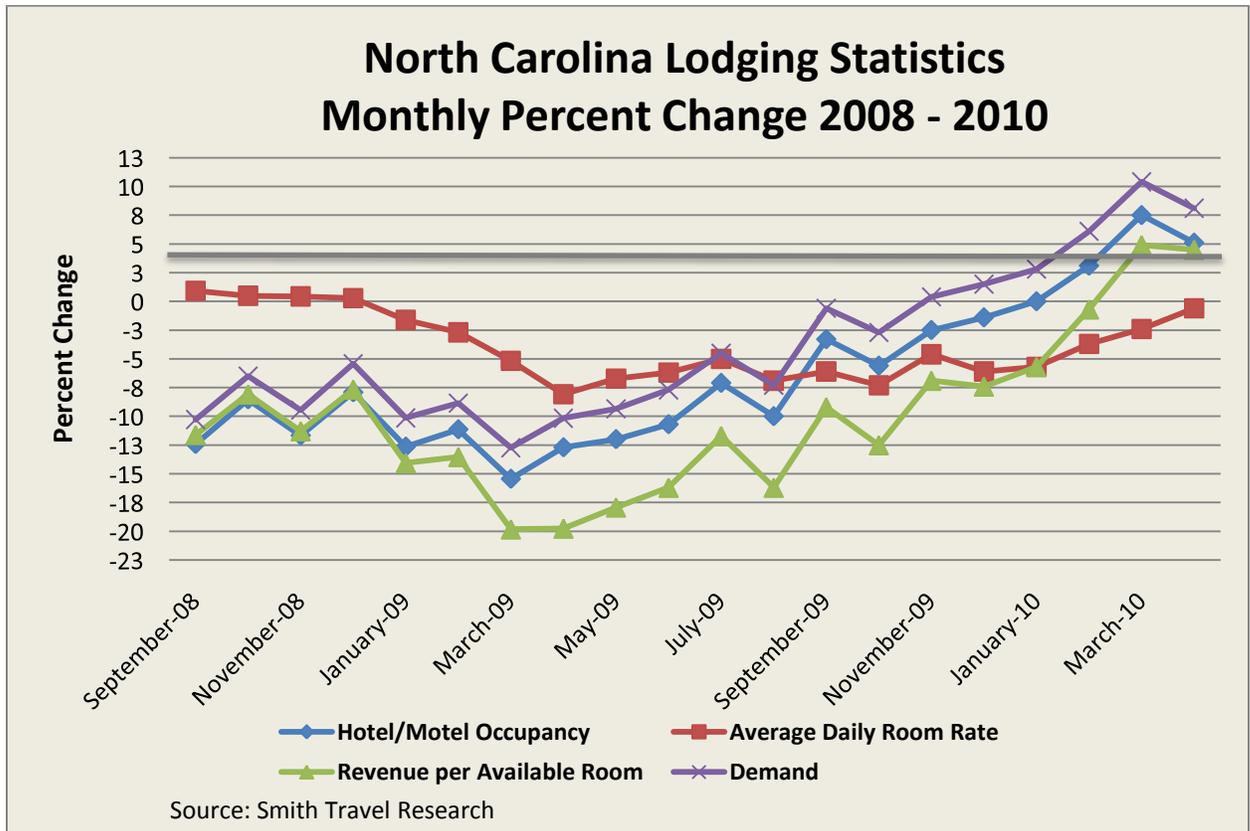


Chart 5 provides a monthly percent change for the four major lodging indicators. The chart allows for an 18 month trend-line analysis that clearly depicts that the major indicators show a steady negative change. After over a year of negative percent change for all indicators, occupancy and demand has shown relative increases the last few months. As well, RevPAR finally moved above 0% increase in March and continued positive growth in April. ADR still lags, though better than any month in the last year in terms of growth.

Chart 6 – Statewide Visitation to Attractions - April 2006 – 2010

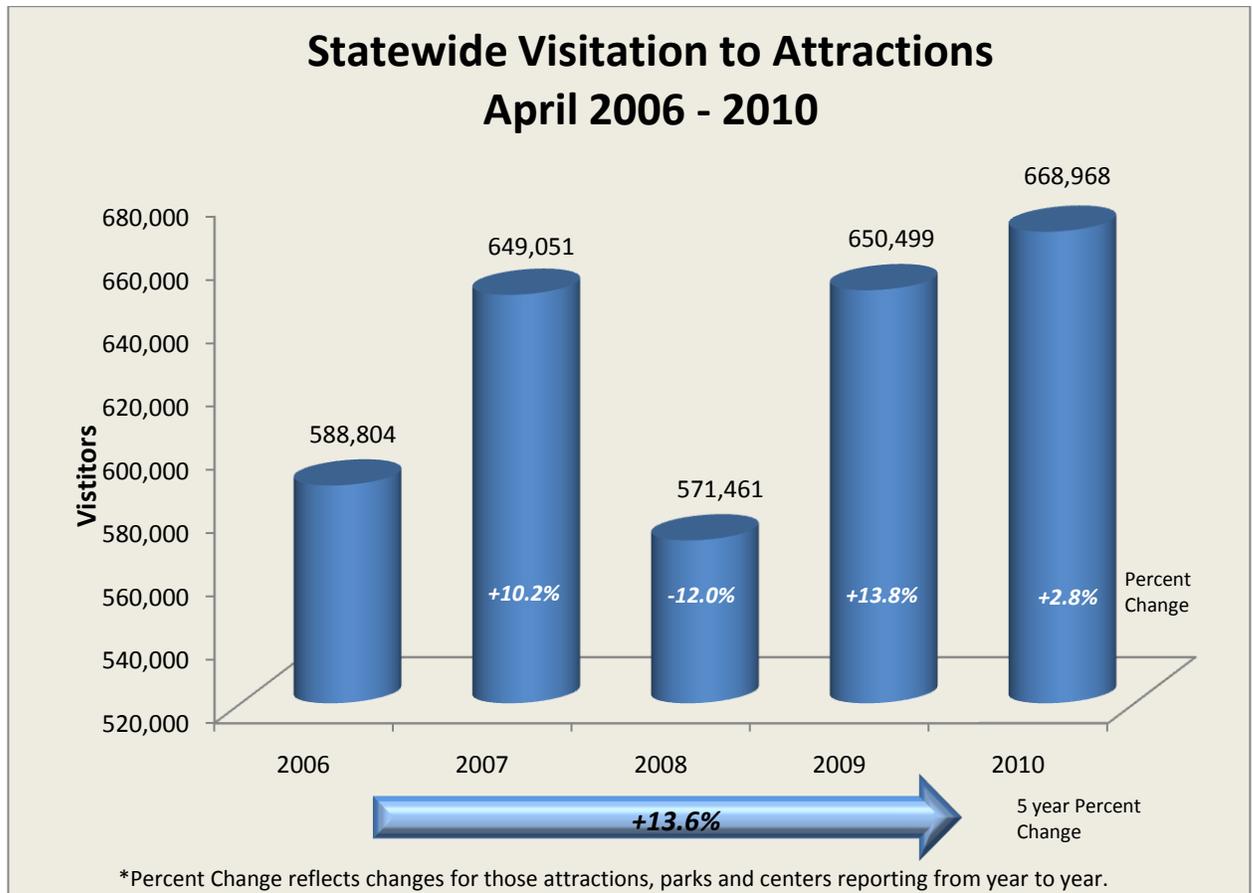


Chart 6 provides a status of the attractions industry in North Carolina for the month of March for the last five years. The numbers represent only a sample of North Carolina attractions that provide their attendance data, and are not intended to be considered a complete list of attractions. However, the wide variation of type and location of the participating attractions allow for a valid aggregate trend analysis on a monthly basis, particularly when tracking percent change. Missing values for attractions who regularly report have been estimated until visitation can be verified. These estimates are not included in percent change calculations from April 2009 to April 2010.

There was an increase in attraction visitation from April 2009 to April 2010. April 2010 had the highest April attraction attendance in at least the last five years. Good weather, and the Easter holiday, most likely contributed to this increase.

Chart 7 – Statewide Visitation to Attractions Monthly History 2006 – 2010

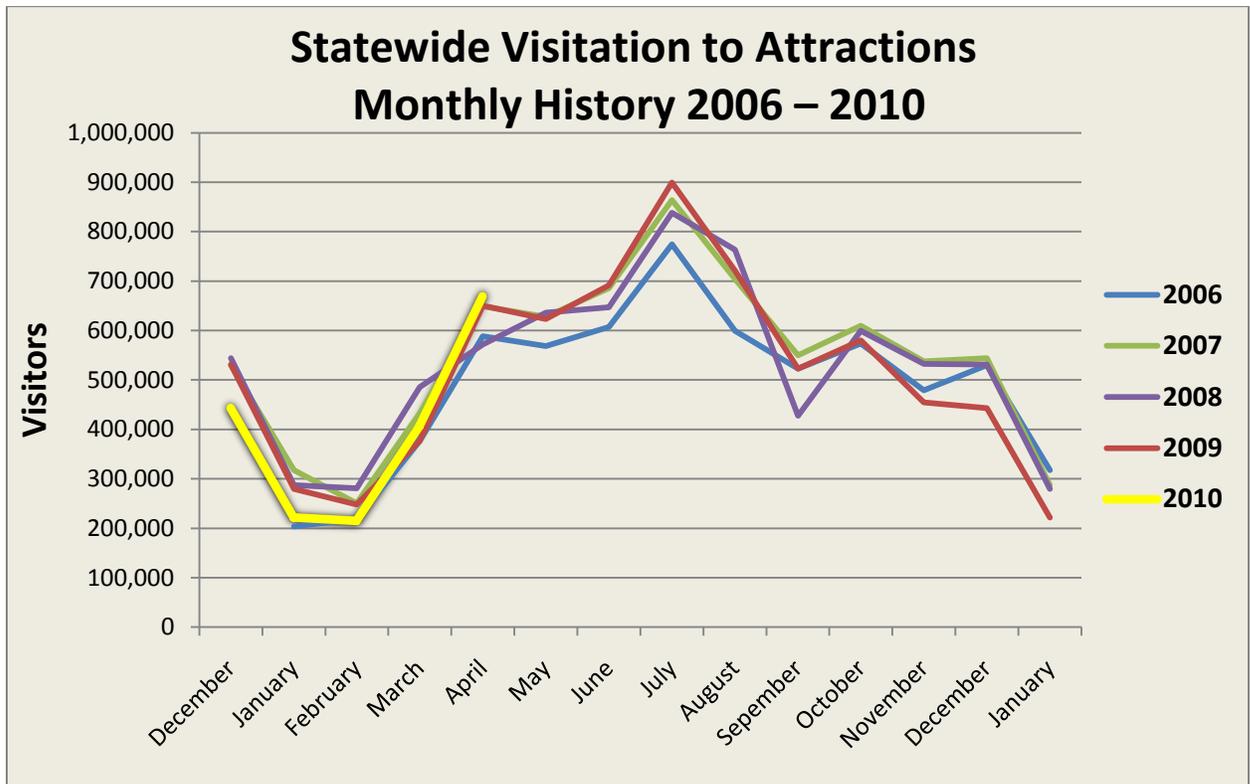


Chart 7 shows a monthly trend of attraction visitation for each of the last five years. This chart allows for a view of the ebb and flow of monthly attraction attendance, while also providing a look at how attendance compares to the same month of the previous years. Not surprisingly, the summer months see higher visitation numbers at statewide attractions. However, it is helpful to view how visitation is allocated by month for strategic planning purposes.

Again, the numbers represent only a sample of North Carolina attractions that provide their attendance data, and are not intended to be considered a complete list of attractions. However, the wide variation of type and location of the participating attractions allow for a valid aggregate trend analysis on a monthly basis.

April 2010 attendance was above other Aprils of the last five years, hopefully setting a trend for months to come.

Chart 8 – State Welcome Center and Local Visitor Center Attendance - April 2006 – 2010

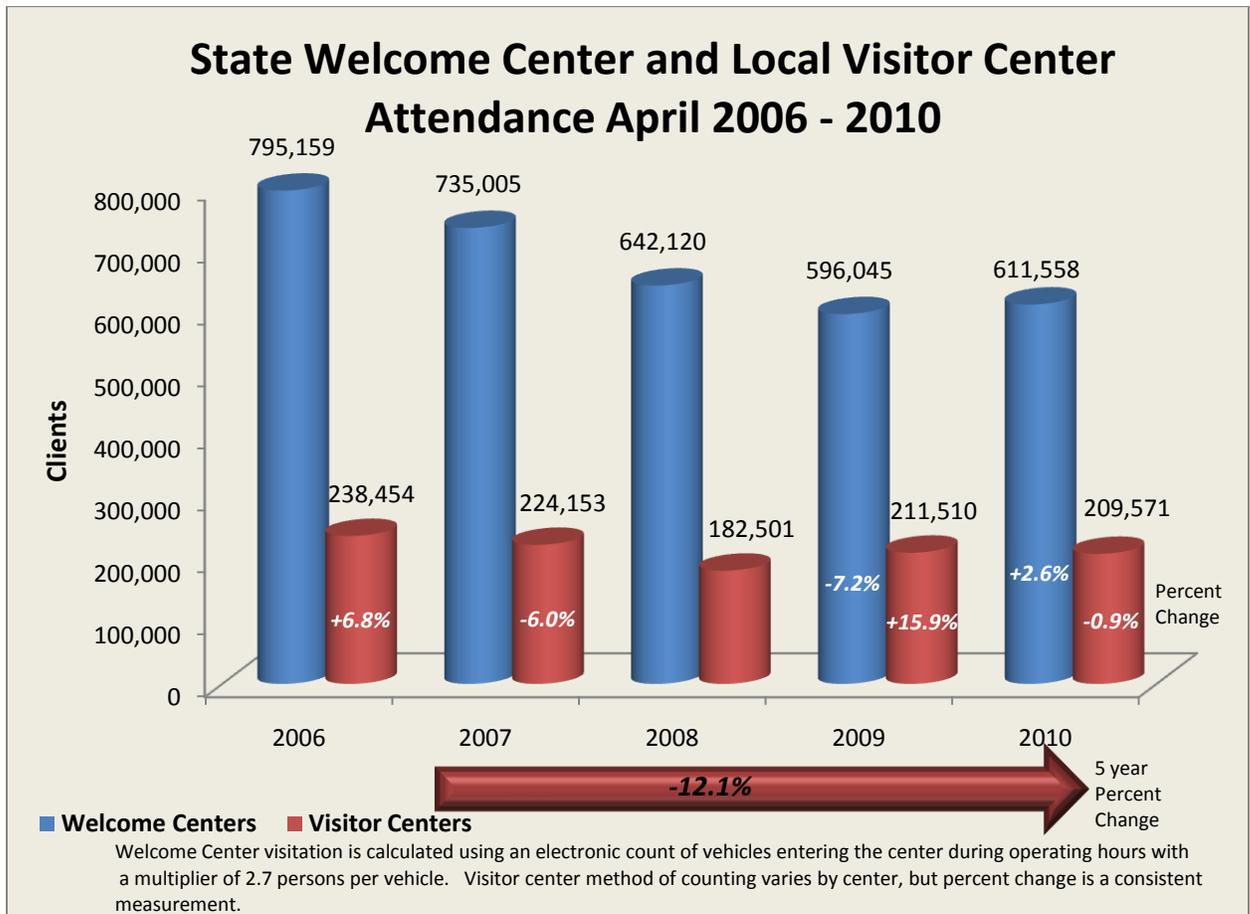


Chart 8 provides April visitation statistics for State Welcome Centers, as well as Local Visitor Centers throughout North Carolina. It should be noted that while there is a percent change indicated for welcome centers for 2007-2008 and 2008-2009, 2008 was the first year a percent change could accurately be provided. The NCDOT spent several years changing the counting mechanism at the state welcome centers making comparisons between years inaccurate from the time the DOT began installation until December 2008. Therefore, previous years' percent changes are not included in this particular chart.

It should also be noted that while the western North Carolina rock slide and the subsequent temporary closure of the I-40 Welcome Center affected April visitation at that center (the center reopened in late April), total visitation increased in April from the previous April.

Chart 9 – Statewide National and State Park Visitation - April 2006 – 2010

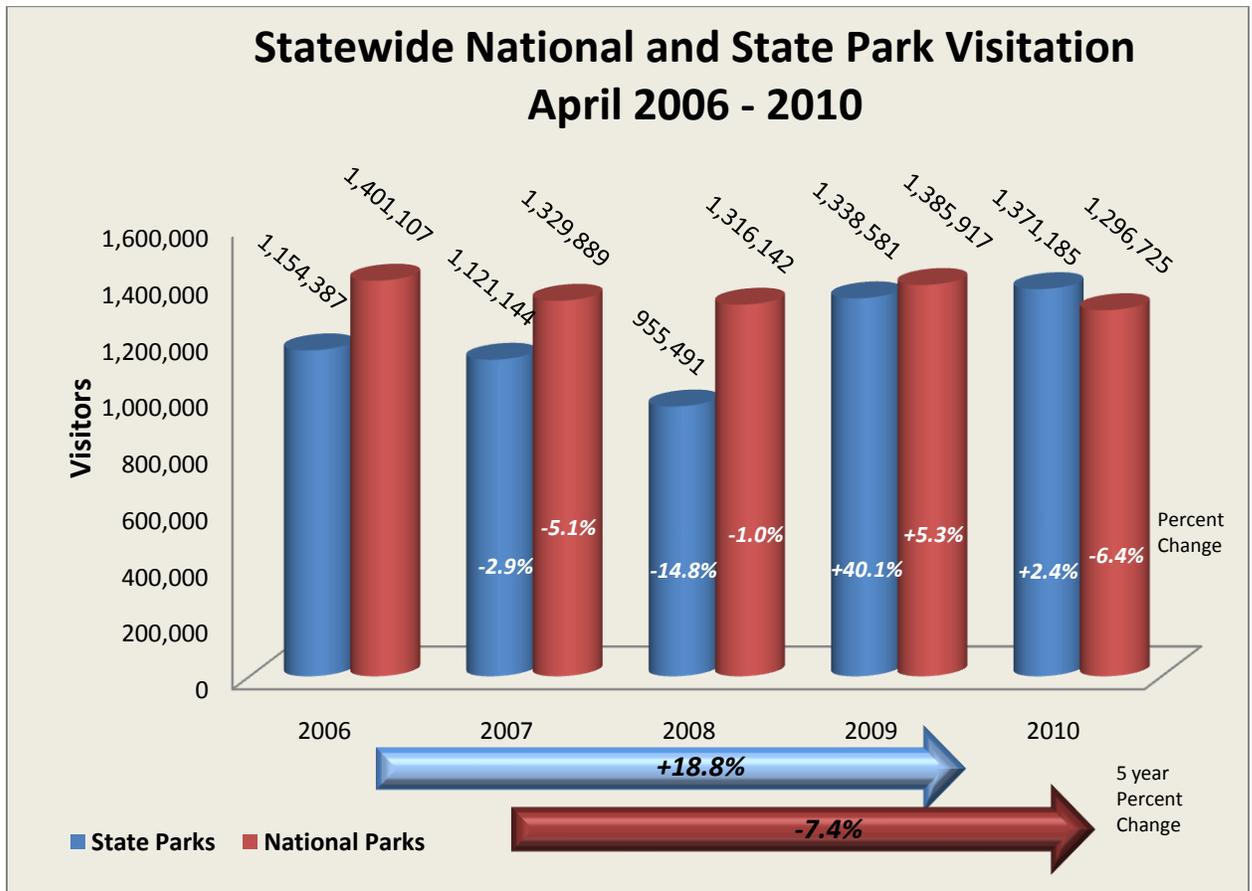
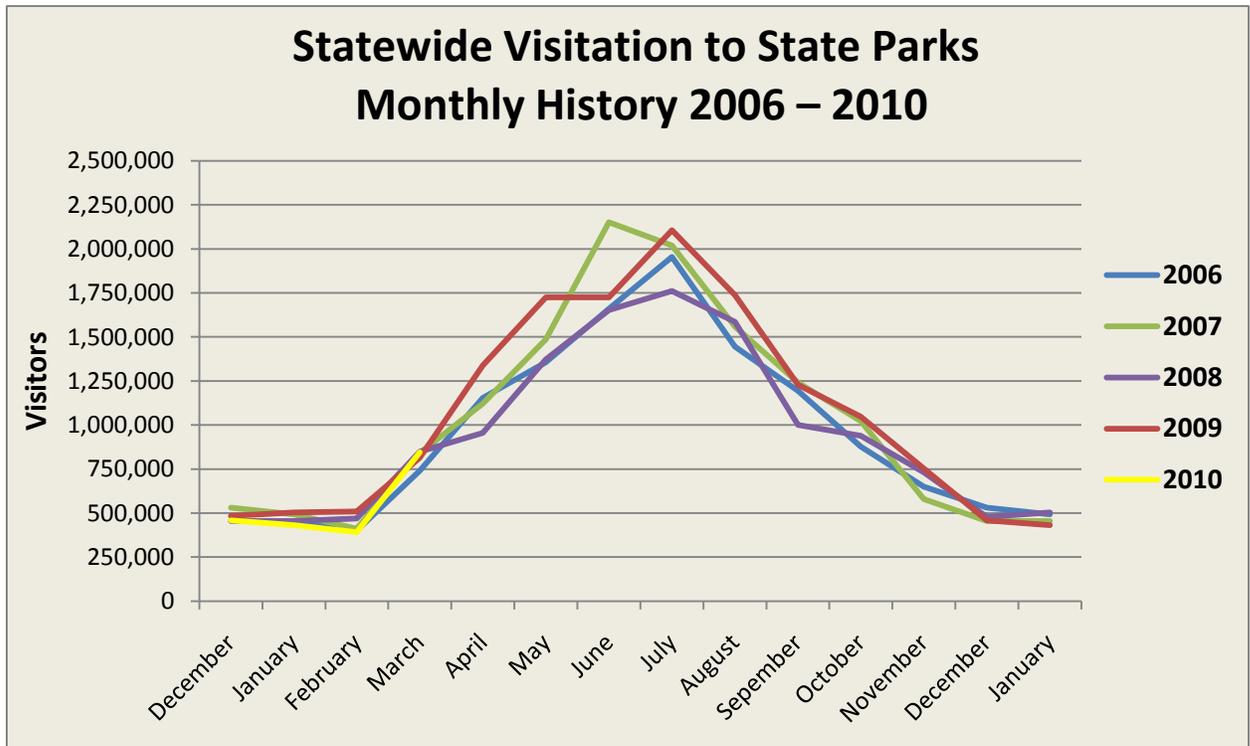


Chart 9 depicts visitation to state and national parks in North Carolina for the last five years months of April. While national parks experienced decreases from March of 2009, state parks had an over 2 percent increase in visitation.

**Chart 10 – Statewide Visitation to State Parks Monthly History 2006 – 2010**



Similar to Chart 7, Charts 10 and 11 provide a monthly trend of state and national park visitation for each of the last five years. These charts help monitor the flow of monthly attraction attendance, while also providing a look at how attendance compares to the same month of the previous years. It is important to note that there are many extraneous variables that can affect visitation at attractions, and particularly at outdoor attractions. Weather, temperature and holidays are variables that should be noted when viewing unusual highs or lows in attendance.

**Chart 11 – Statewide Visitation to National Parks Monthly History 2006 – 2010**

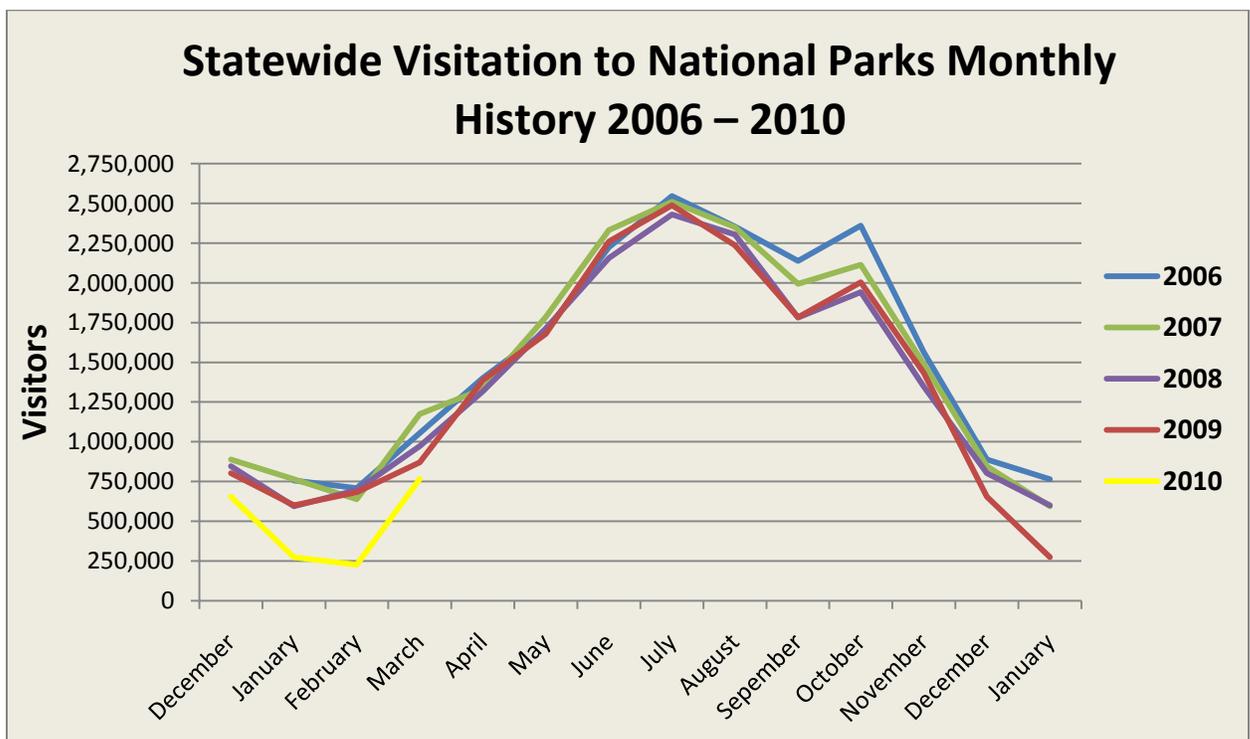


Chart 12 – Statewide Airport Arrivals and Departures - April 2006 – 2010

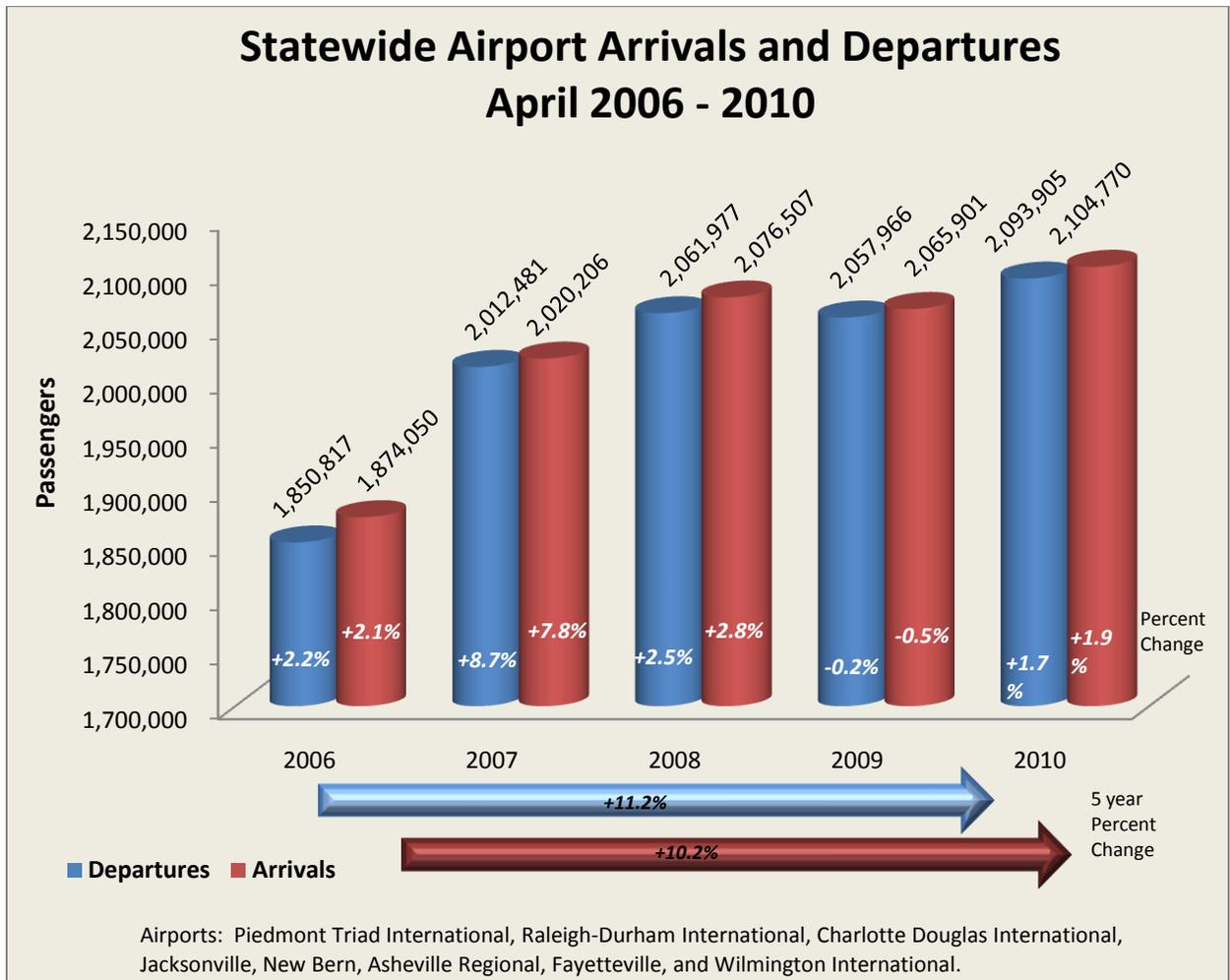


Chart 12 shows April airport arrivals and departures for each of the previous five years. The arrivals and departures increased statewide from last April, and there has been a positive five-year increase in both for the month of April.

Chart 13 – Lower Atlantic Average Monthly Retail Gas Prices for Unleaded – April 2006 – 2010

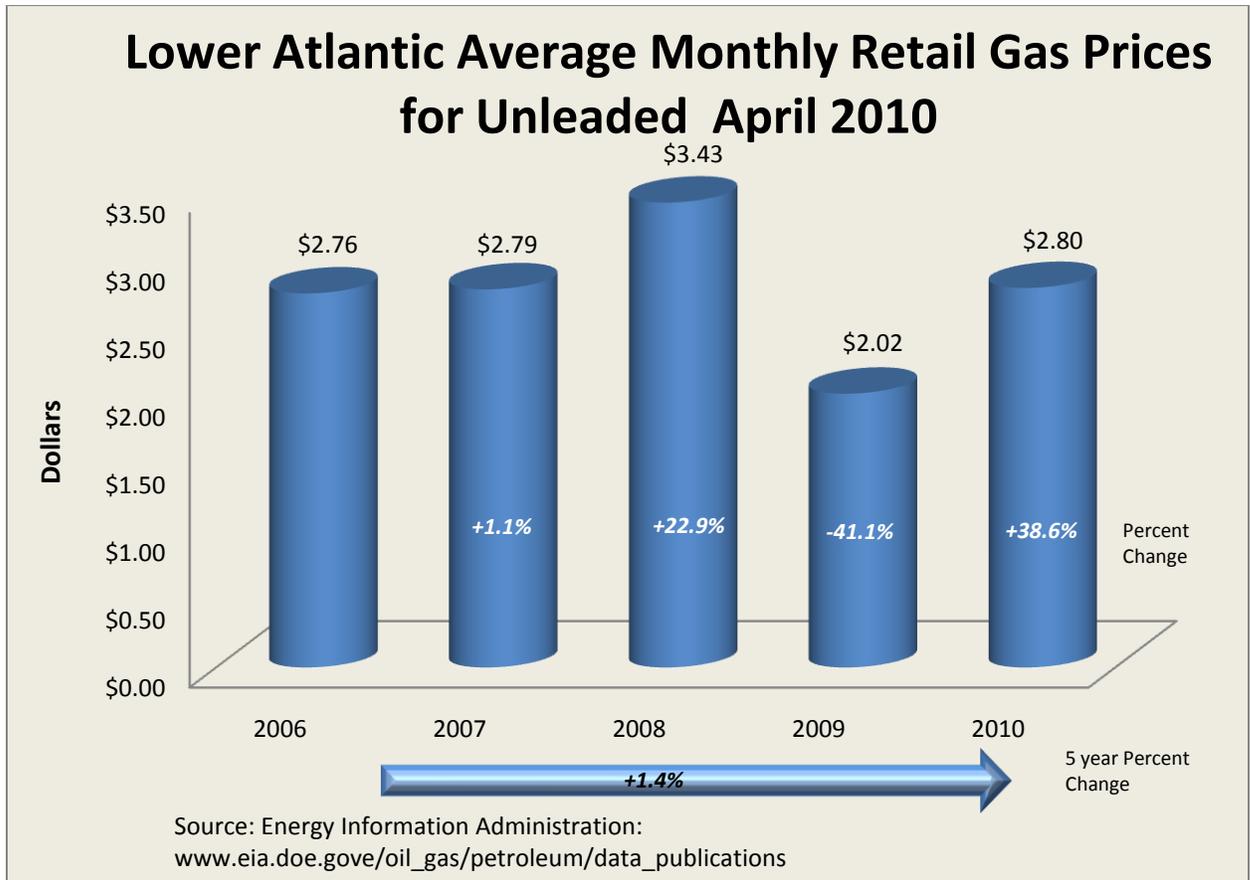


Chart 13 provides the average price per gallon of unleaded gasoline for April 2010 and the same month from the four previous years. The data provided above, when compared with other indicators such as attraction attendance and visitor spending data, can be very helpful in the analysis of general travel trends. Fuel prices in April 2010 were up significantly from last April, though still below 2008 prices.

Chart 14 – North Carolina Average Temperature and Precipitation – April 2009 – 2010

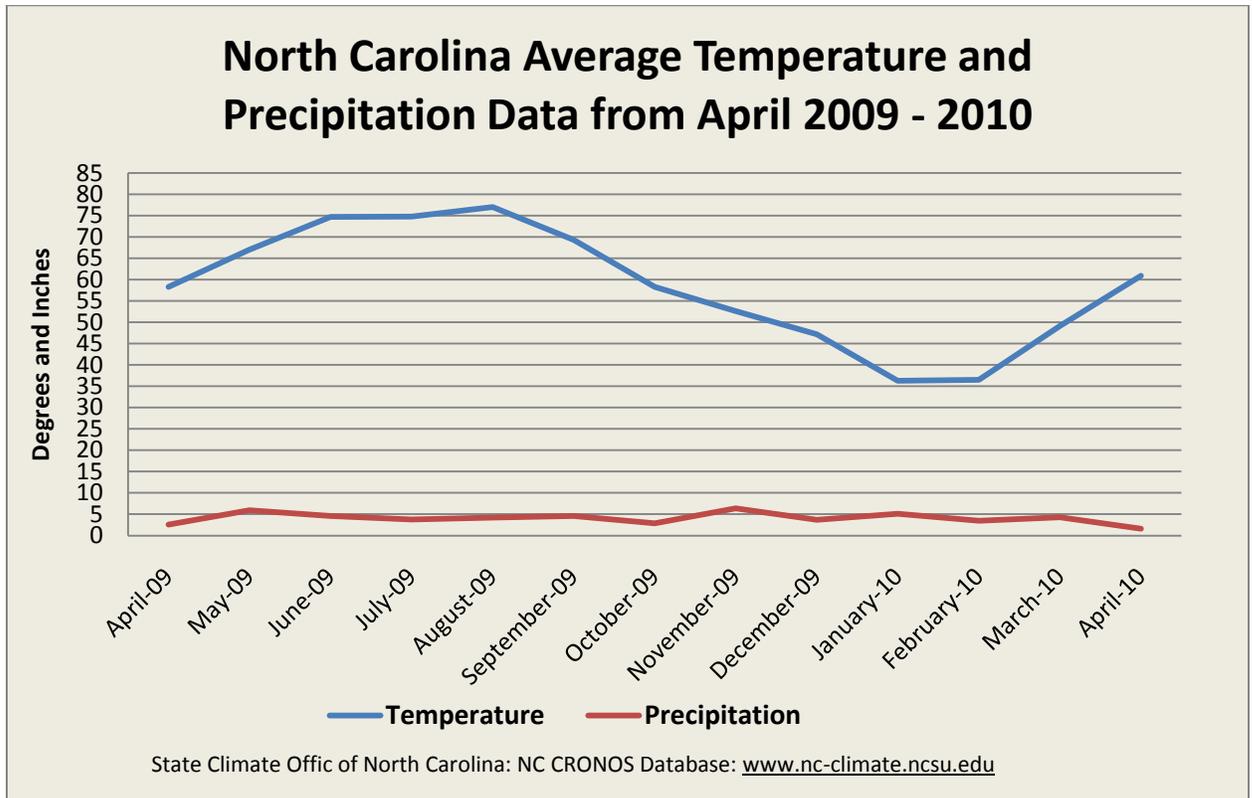


Chart 14 provides 13 months of air temperature and precipitation. This data, when analyzed together with gas price data and other tourism indicators, can be valuable in determining possible reasons for significant increases and/or decreases in indicators. For instance, greater than normal precipitation during a particular month can often help explain decreases in attendance at outdoor attractions.

April 2010 had slightly higher average temperature than 2009, and there was about an inch less precipitation in April 2010 than 2009, most likely contributing to the increase in attraction attendance from the same time last year.

**Section 2 – Geographic Marketing Region (Coastal/Piedmont/Mountain) Tourism Indicator Analysis for April 2010**

**Chart 15 – Hotel/Motel Statistics by Geographic Region - April 2010**

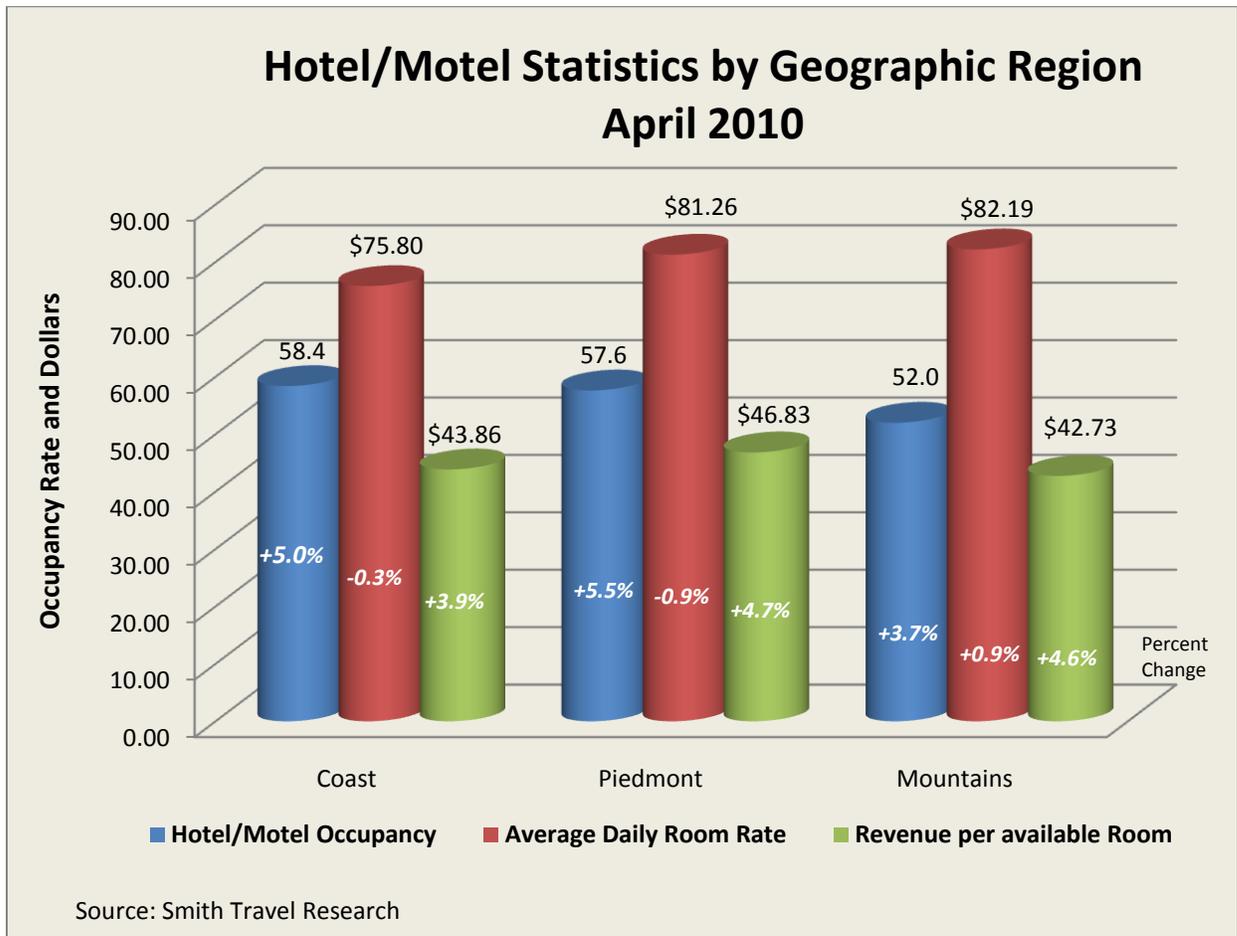


Chart 15 provides a one year comparison in lodging statistics for the three geographic marketing regions of North Carolina in April. Occupancy and RevPAR in April 2010 increased in all three regions, but ADR still lags very slightly in the coastal and piedmont regions.

Chart 16 – Hotel/Motel Room Demand by Geographic Region - April 2010

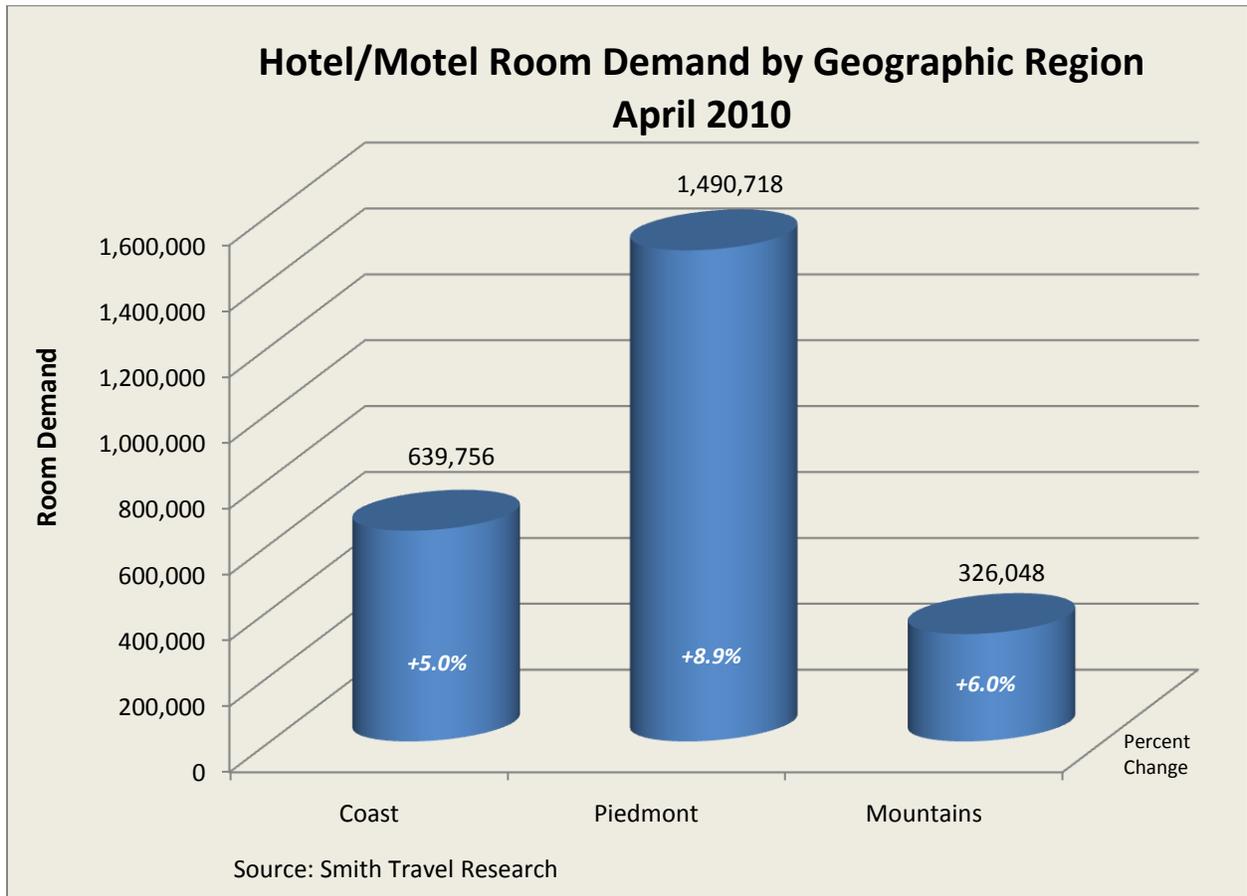


Chart 16 provides hotel/motel demand by geographic region for April 2010. Demand differs from occupancy in that it is the total number of rooms sold, not accounting for differences in room supply. The Piedmont Region experienced an almost nine percent positive change in demand from April 2009 to April 2010, and the other regions also showed healthy demand increases from April 2009.

Chart 17 – Visitation to Attractions and Parks by Geographic Region – April 2010

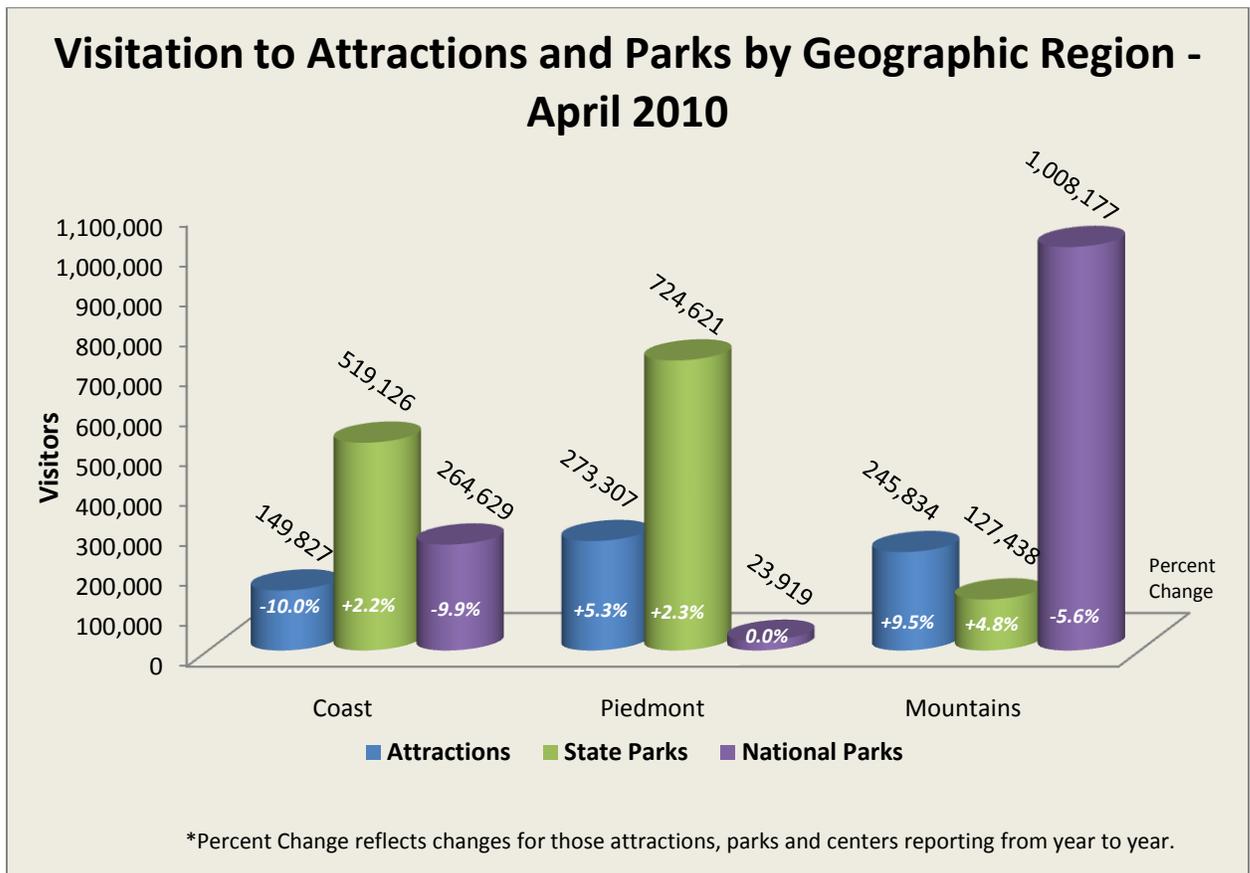


Chart 17 provides a look at the attractions industry in North Carolina in April 2010 by geographic region. As with the statewide numbers, the following data represents only a sample of North Carolina attractions that provide their attendance data, and are not intended to be considered a complete list of attractions. However, the wide variation of type and location of the participating attractions allow for a valid aggregate trend analysis on a monthly basis.

The Piedmont and Mountain regions showed increases in attraction attendance as compared to last March. However, the Coastal Region again experienced a difficult month in terms of attractions and national park attendance. State Park attendance was up in each of the regions from April 2009 to April 2010.

Chart 18 – State Welcome Center and Local Visitor Center Attendance by Geographic Region – April 2010

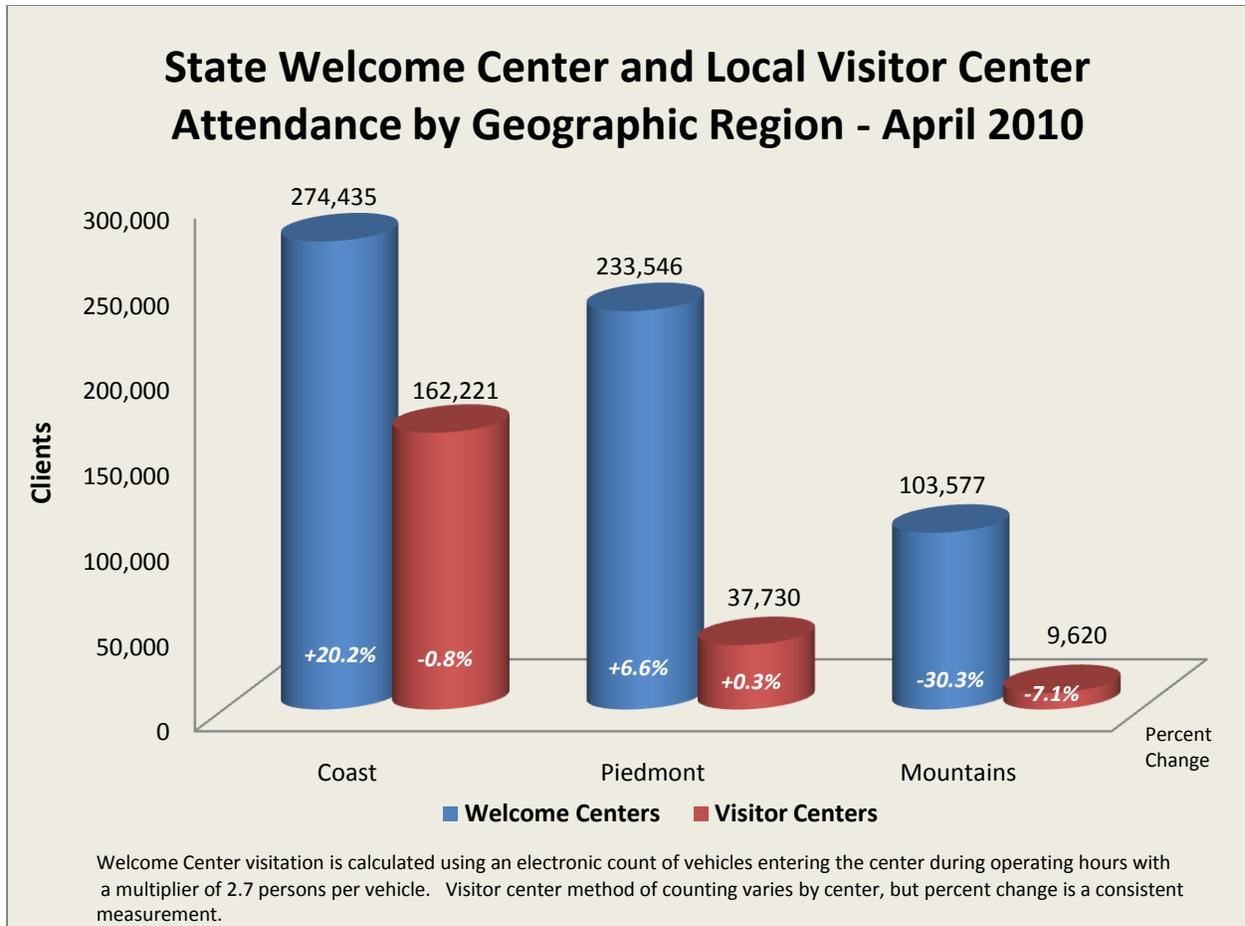


Chart 18 shows welcome center and visitor center attendance by geographic region and offers comparisons from April 2009. The Coastal Region experienced a significant increase in welcome center numbers in April, while the centers in the mountains saw decreases probably related to the I-40 closure.

Chart 19 – Airport Arrivals and Departures by Geographic Region – April 2010

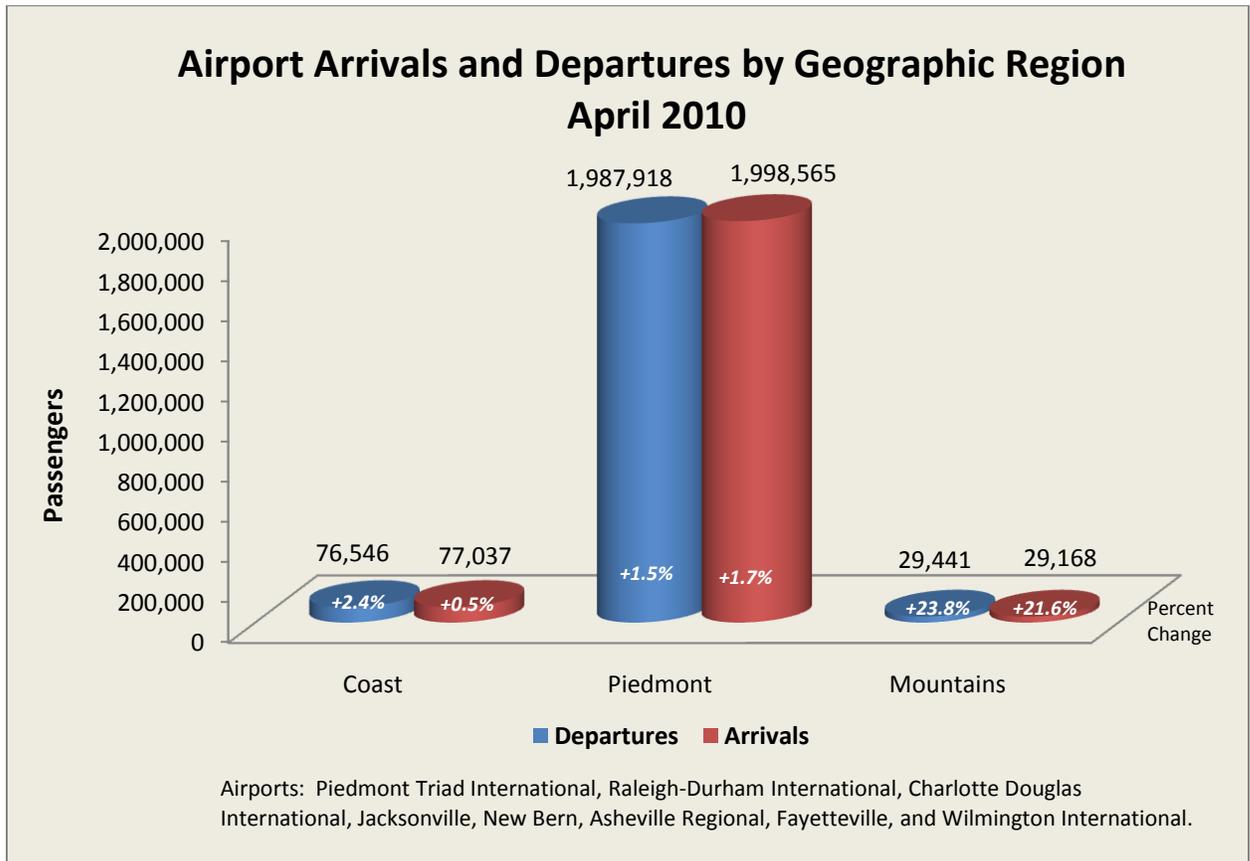


Chart 19 provides a breakdown of air travel statistics by geographic region. While the majority of air traffic is through the Piedmont Region, it is helpful to maintain a trend of other regional airport usage. The Mountain Region showed strong growth of almost twenty percent in air traffic during the month of April, while the other regions saw smaller, but still positive, increases from last year.

### Section 3: Economic Development Region Tourism Indicator Analysis – April 2010

The seven economic regions include:

- 1 – Northeast (Bertie, Camden, Chowan, Currituck, Gates, Halifax, Hertford, Northampton, Pasquotank, Perquimans, Beaufort, Dare, Hyde, Martin, Tyrrell, Washington).
- 2 – Eastern (Carteret, Craven, Jones, Onslow, Pamlico, Duplin, Edgecombe, Green, Lenoir, Nash, Pitt, Wayne, Wilson).
- 3 – Southeast (Brunswick, Columbus, New Hanover, Pender, Bladen, Cumberland, Hoke, Richmond, Robeson, Sampson, Scotland).
- 4 – Triangle (Franklin, Harnett, Johnston, Vance, Wake, Warren, Chatham, Durham, Granville, Lee, Moore, Orange, Person).
- 5 – Triad (Alamance, Caswell, Guilford, Montgomery, Randolph, Rockingham, Davidson, Davie, Forsyth, Stokes, Surry, Yadkin).
- 6 – Carolinas (Alexander, Catawba, Cleveland, Iredell, Rowan, Anson, Cabarrus, Gaston, Lincoln, Mecklenburg, Stanly, Union).
- 7 – Western (Alleghany, Ashe, Avery, Buncombe, Burke, Caldwell, Clay, Graham, Haywood, Henderson, Jackson, Macon, Madison, McDowell, Mitchell, Polk, Rutherford, Swain, Transylvania, Watauga, Wilkes, Yancey).

Chart 20 – Hotel/Motel Statistics by Economic Development Region - April 2010

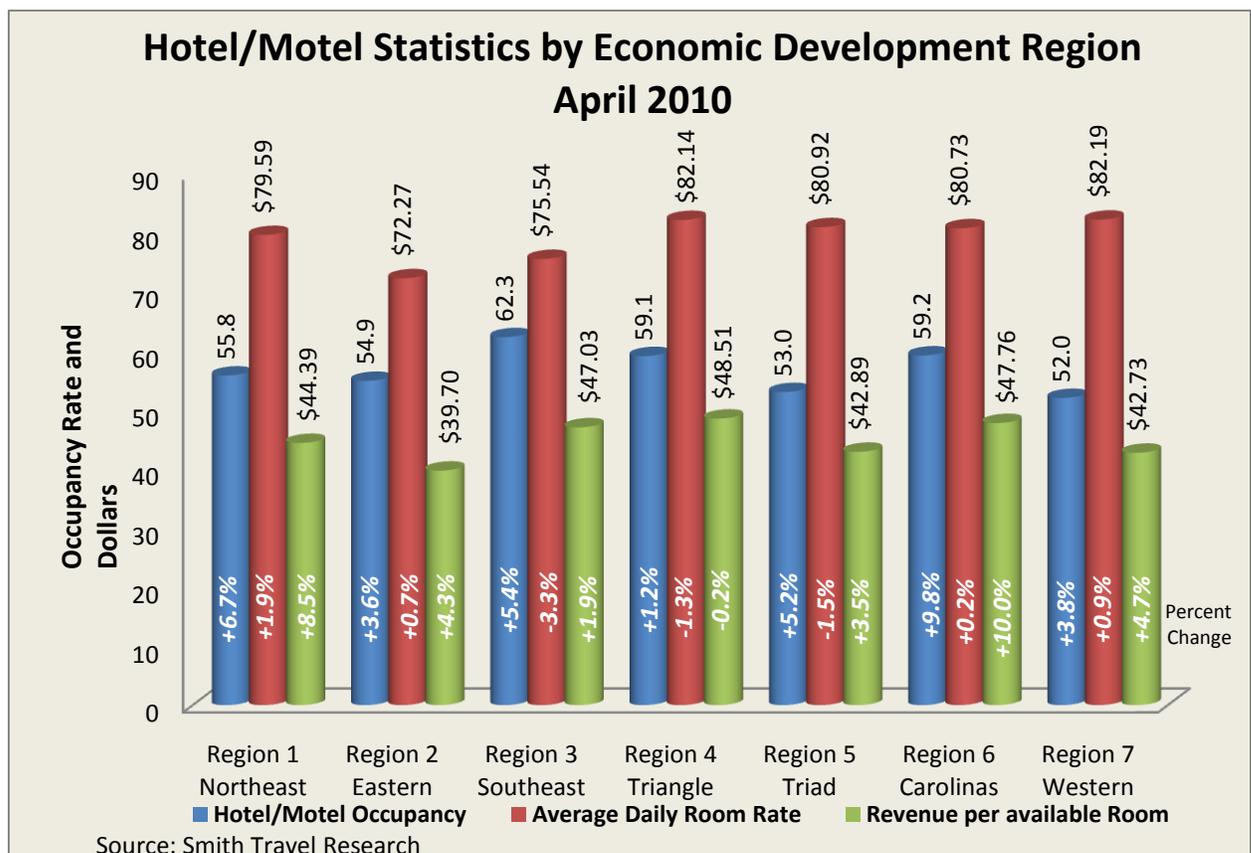


Chart 20 provides lodging indicators for April 2010 by economic development region. Also shown are percent changes from April 2009. This graph allows individual regions within the state to track indicators specific to their general destinations, while still being able to compare their data to the state data shown in Section 1.

Chart 21 – Hotel/Motel Room Demand by Economic Development Region - April 2010

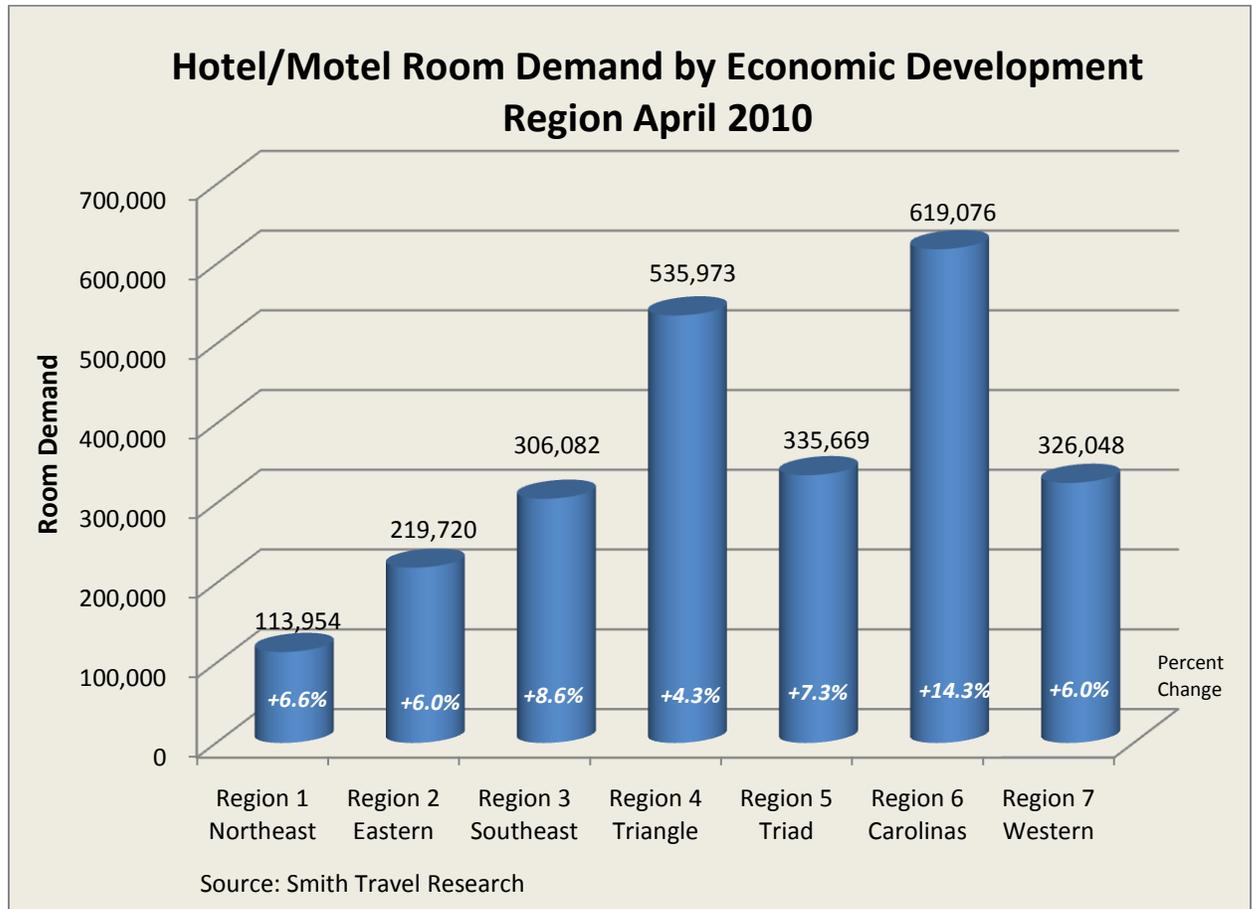


Chart 21 depicts hotel/motel demand for the month of April 2010 by economic development region. Demand is the number of rooms sold excluding complimentary rooms. All regions showed increased demand from April 2009 to 2010. The Carolinas Region had particularly positive (+14.3%) increases in demand from April 2009 to April 2010.

## Section 4: National Travel Price Index

The Travel Price Index (TPI) measures the seasonally unadjusted inflation rate of the cost of travel away from home in the United States. The TPI is based on U.S. Department of Labor price data collected for the monthly Consumer Price Index (CPI). The TPI is released monthly and is directly comparable to the CPI.

### Variables included in calculating the TPI:

Recreation Services	Food Away from Home	Airline Fares
Food and Beverage	Other Lodging (Include Hotel/Motel)	Intra-city Public Transportation
Alcohol Away From Home	Transportation	Motor Fuel
		Other Intercity Transportation

Chart 22 – National Travel Price Index December 2006 – April 2010

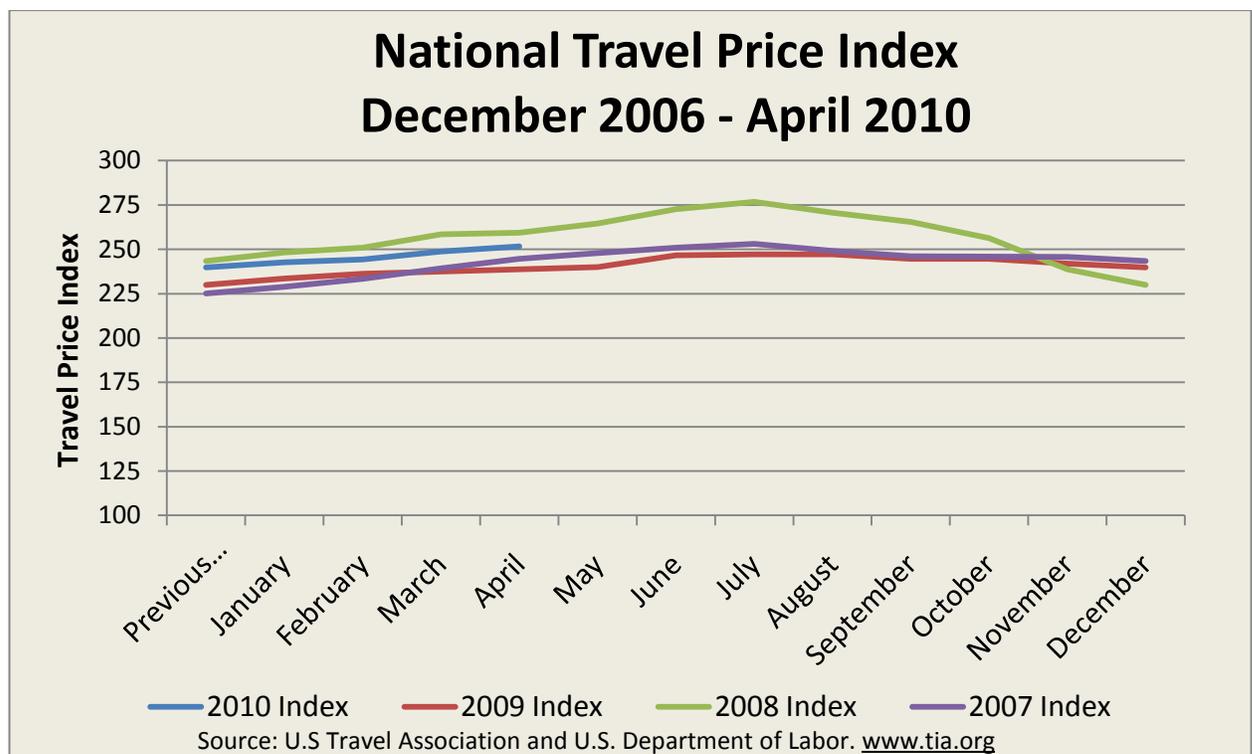


Chart 22 provides a two year trend of the National Travel Price Index (TPI). Steady growth was experienced through mid-2008; however in November 2008, it is clear that as the TPI fell below 2007 levels, the tourism industry began feeling the full effect of the recession. Into 2009, the TPI remained slightly at or below the 2007 level, though for the last two months of 2009 peaked above the 2008 index. Into March 2010 the TPI is still slightly below the same time period in 2008, but above 2007 and 2009.