



January 2013

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 January 2013

Chart 1 – Hotel/Motel Occupancy in North Carolina - January 2006 – 2013

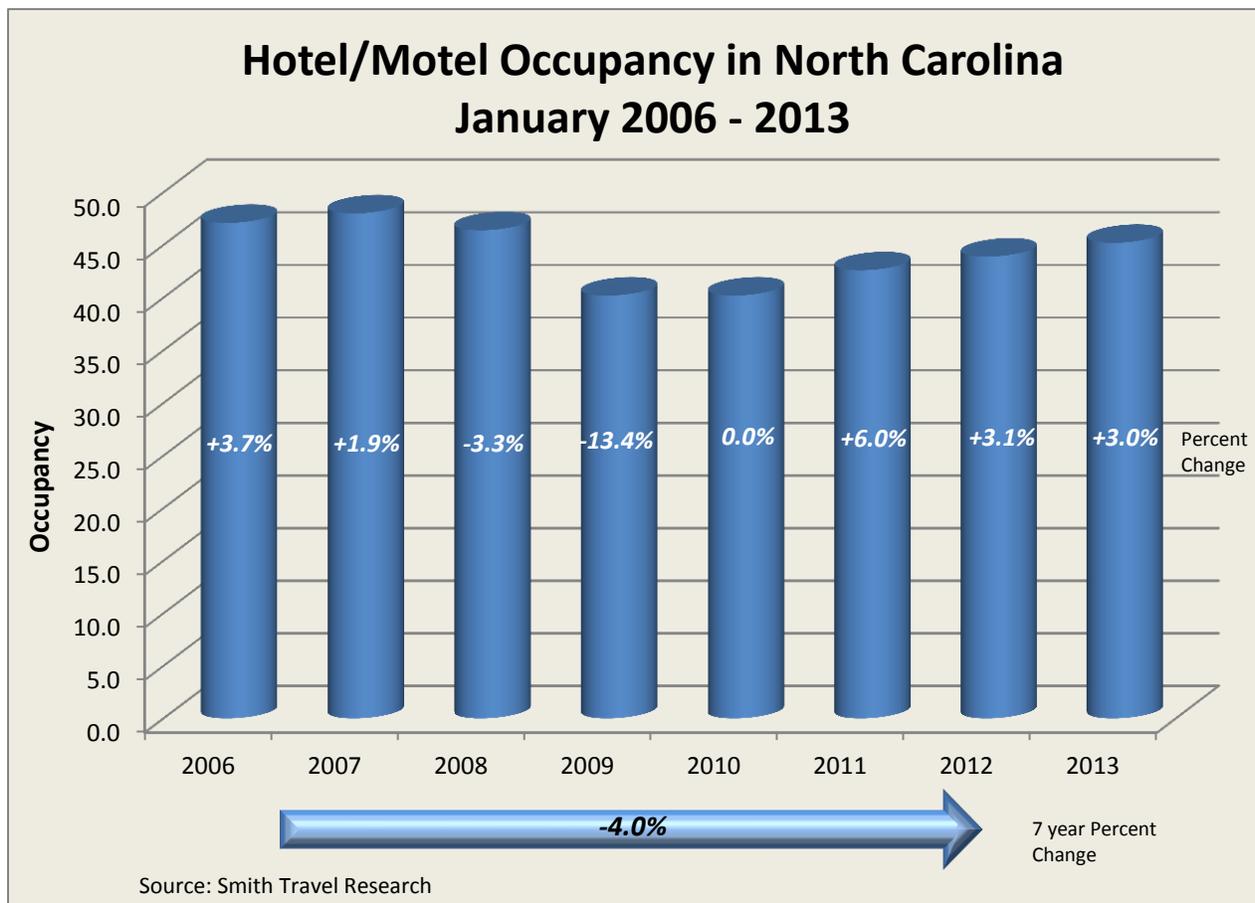


Chart 1 provides a comparison over a eight year period to show the trend of occupancy in the state for the month of January. Occupancy for January 2013 was up three percent from January 2012. At 45.2, occupancy for the month was the highest since 2008. *Occupancy at the national level increased by 3.6 percent in January 2013 from the previous year.*

Chart 2 – Hotel/Motel Average Daily Room Rate in North Carolina - January 2006 – 2013

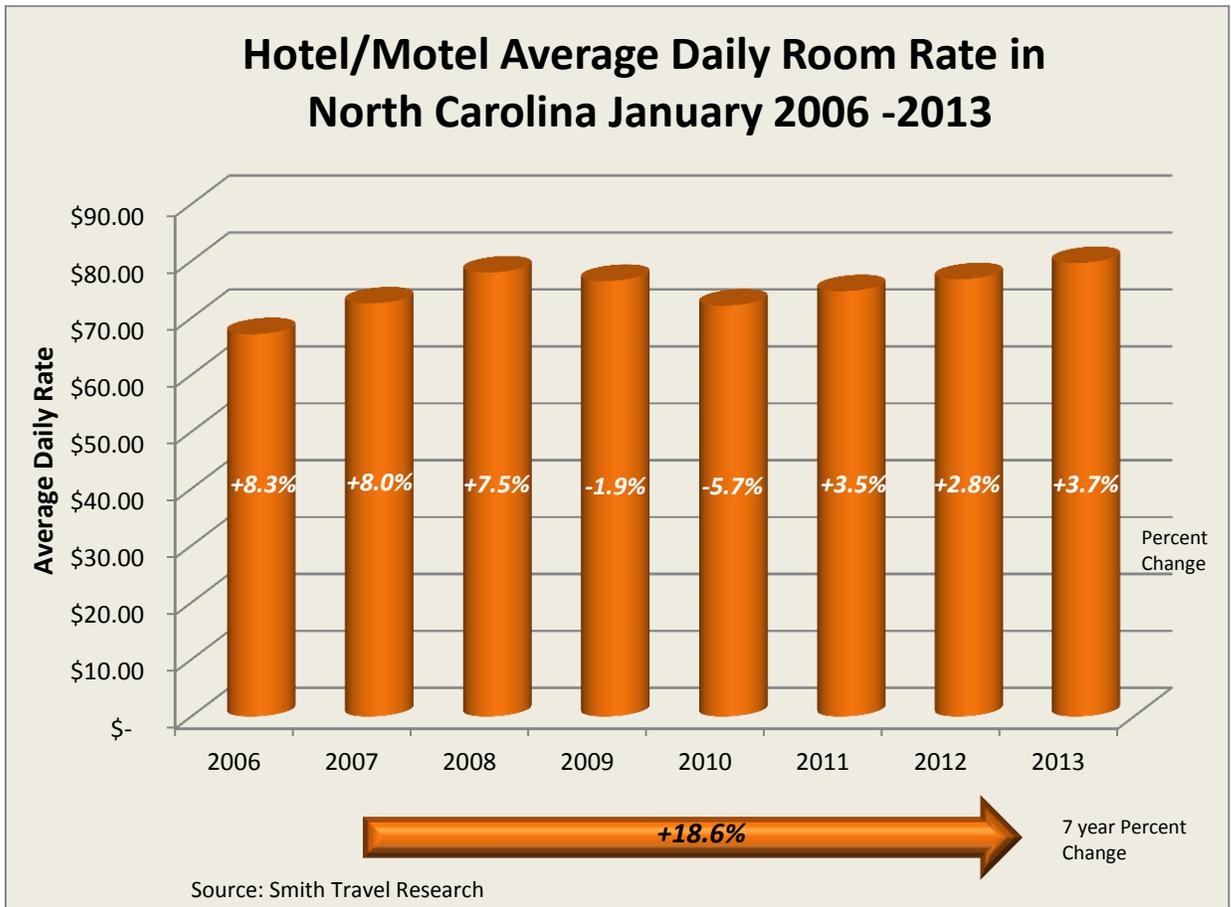
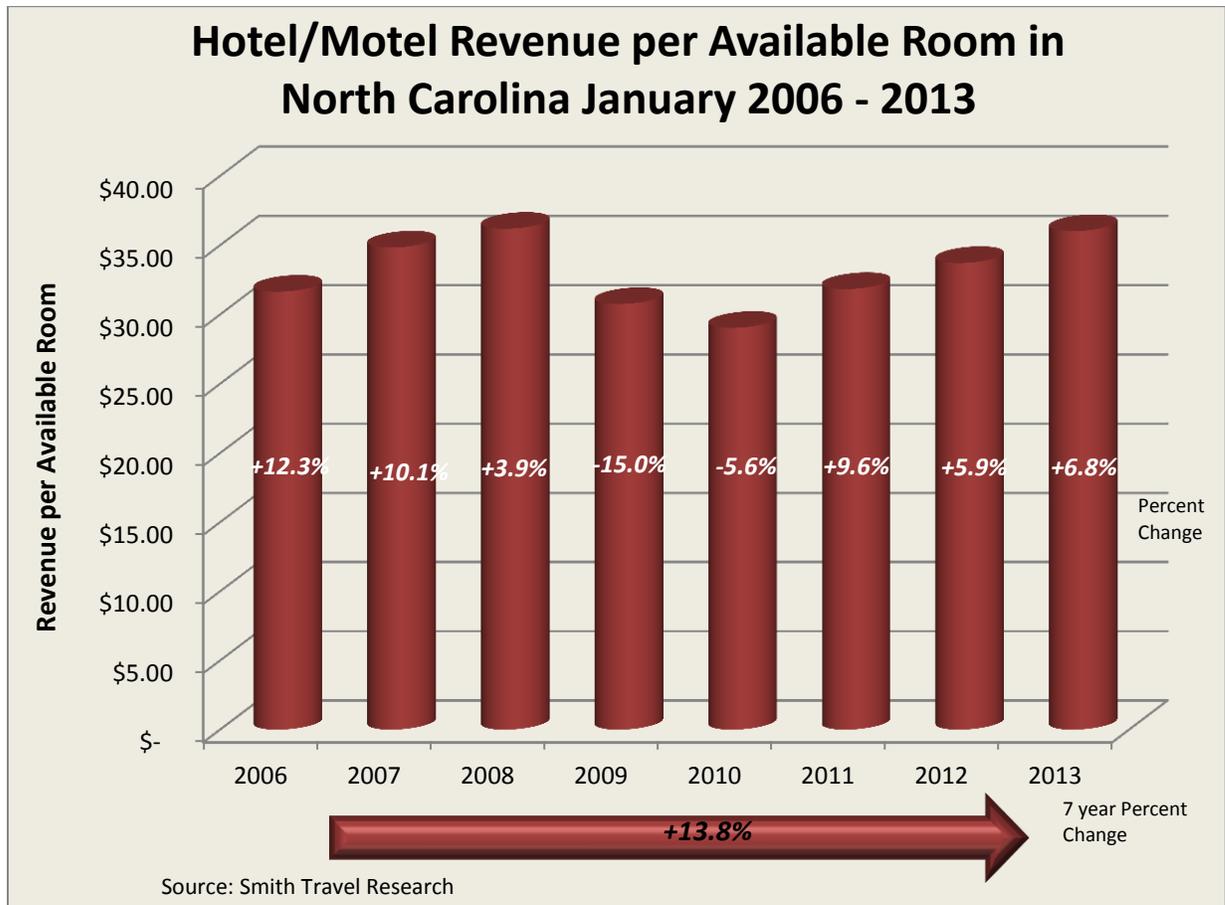


Chart 2 provides a comparison over a seven year period to show the trend of average daily room rate (ADR) in the state for the month of January. ADR increased nearly four percent in January, and is up nearly twenty percent over the last seven years. The ADR of \$79.67 was the highest on record for a January in North Carolina. ADR at the national level was up 5.1% in January 2013 from the previous January.

Chart 3 – Hotel/Motel Revenue per Available Room in North Carolina - January 2006 – 2013



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 eight year period to show the trend of RevPAR in the state for the month of January. RevPAR was up nearly seven percent in January 2013. *RevPAR at the national level was up 8.8% in January 2013 from the previous January.*

Chart 4 – Hotel/Motel Room Demand in North Carolina – January 2006 – 2013

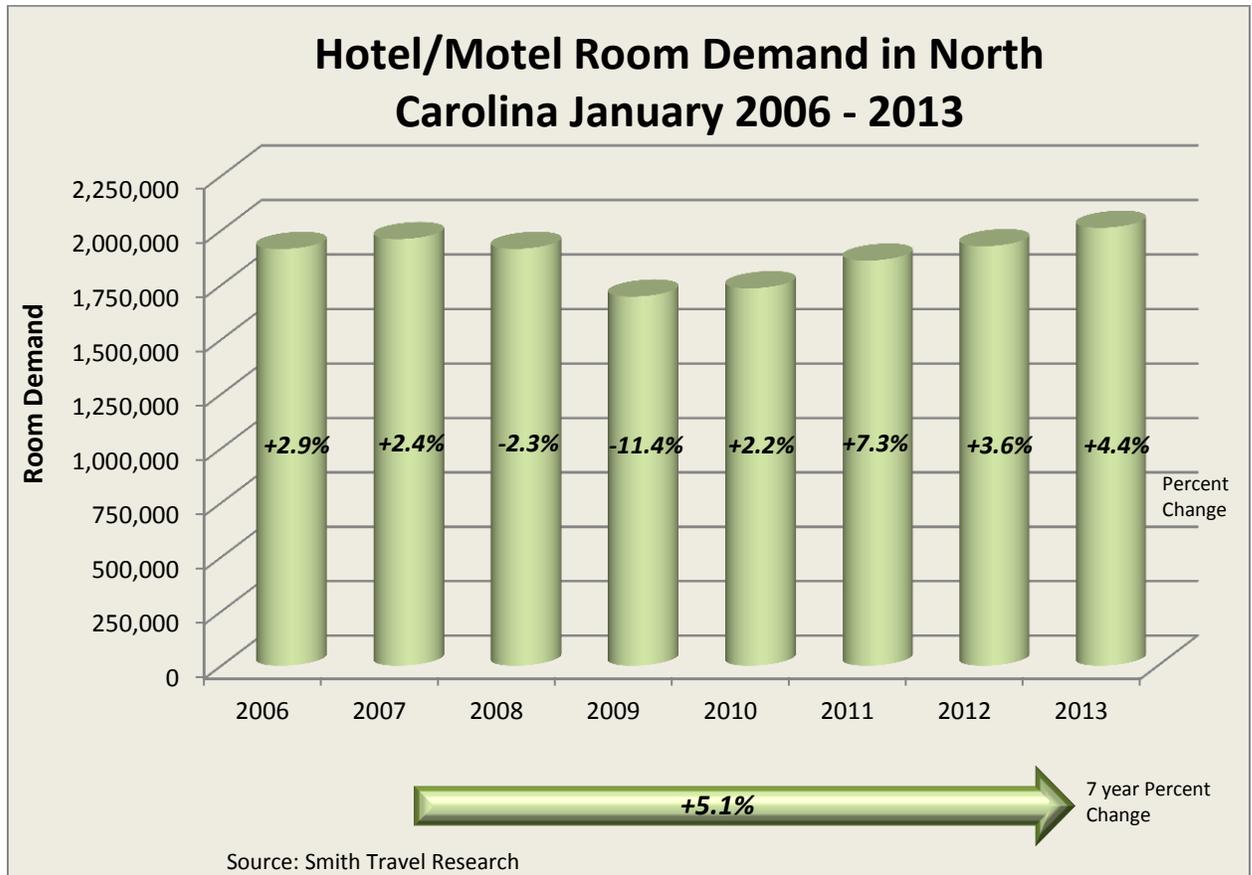


Chart 4 depicts hotel/motel demand for the month of January 2013 with comparisons to the previous seven years. Demand is the number of rooms sold excluding complimentary rooms. Room demand for January was at a record high this year with over 2 million rooms, 4.4% greater than January 2012. Room demand at the national level saw an increase of 4.3% change in January 2013 from the previous January.

Chart 5 – North Carolina Lodging Statistics Monthly Percent Change 2008 – 2013

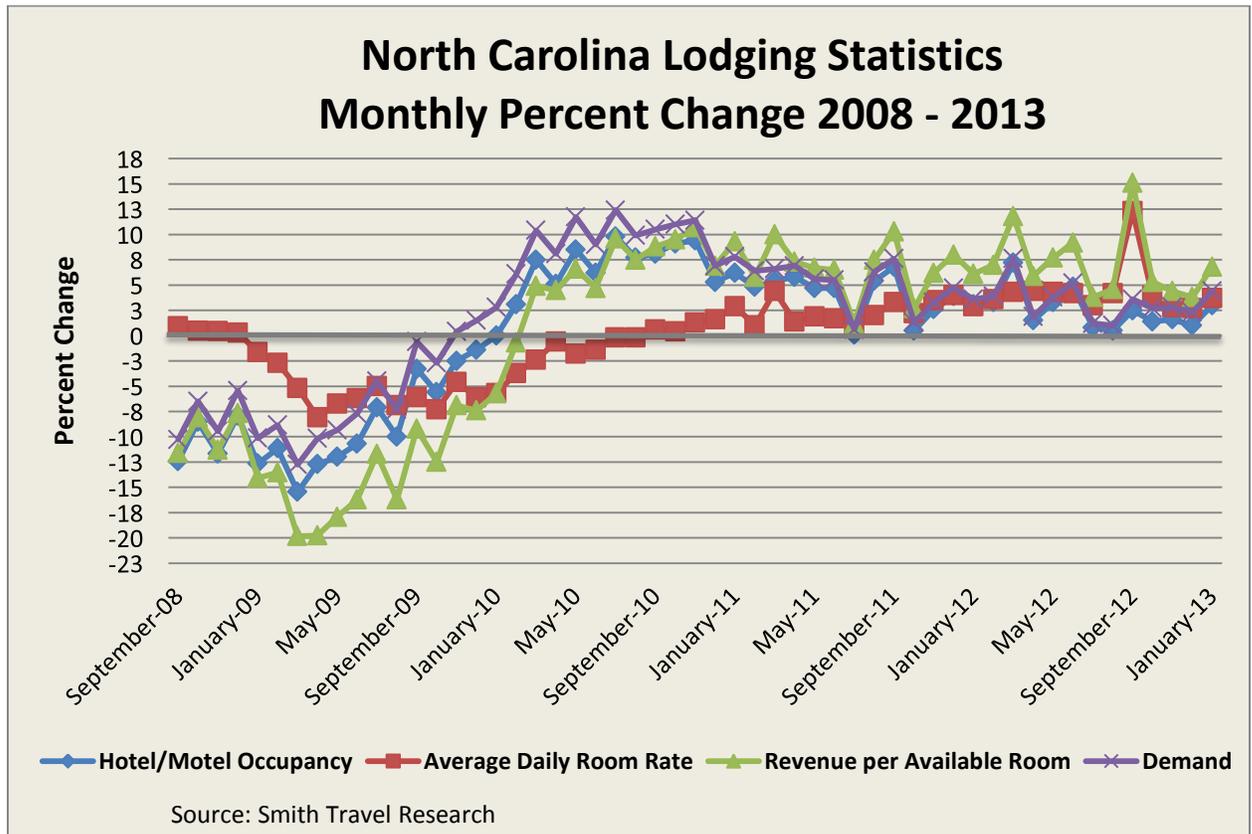


Chart 5 provides a monthly percent change for the four major lodging indicators. The chart allows for a three year trend-line analysis that clearly depicts that the major indicators have shown a steady positive change since early 2010 and still remain in the positive range.

Chart 6 – Statewide Visitation to Attractions – January 2007 – 2013

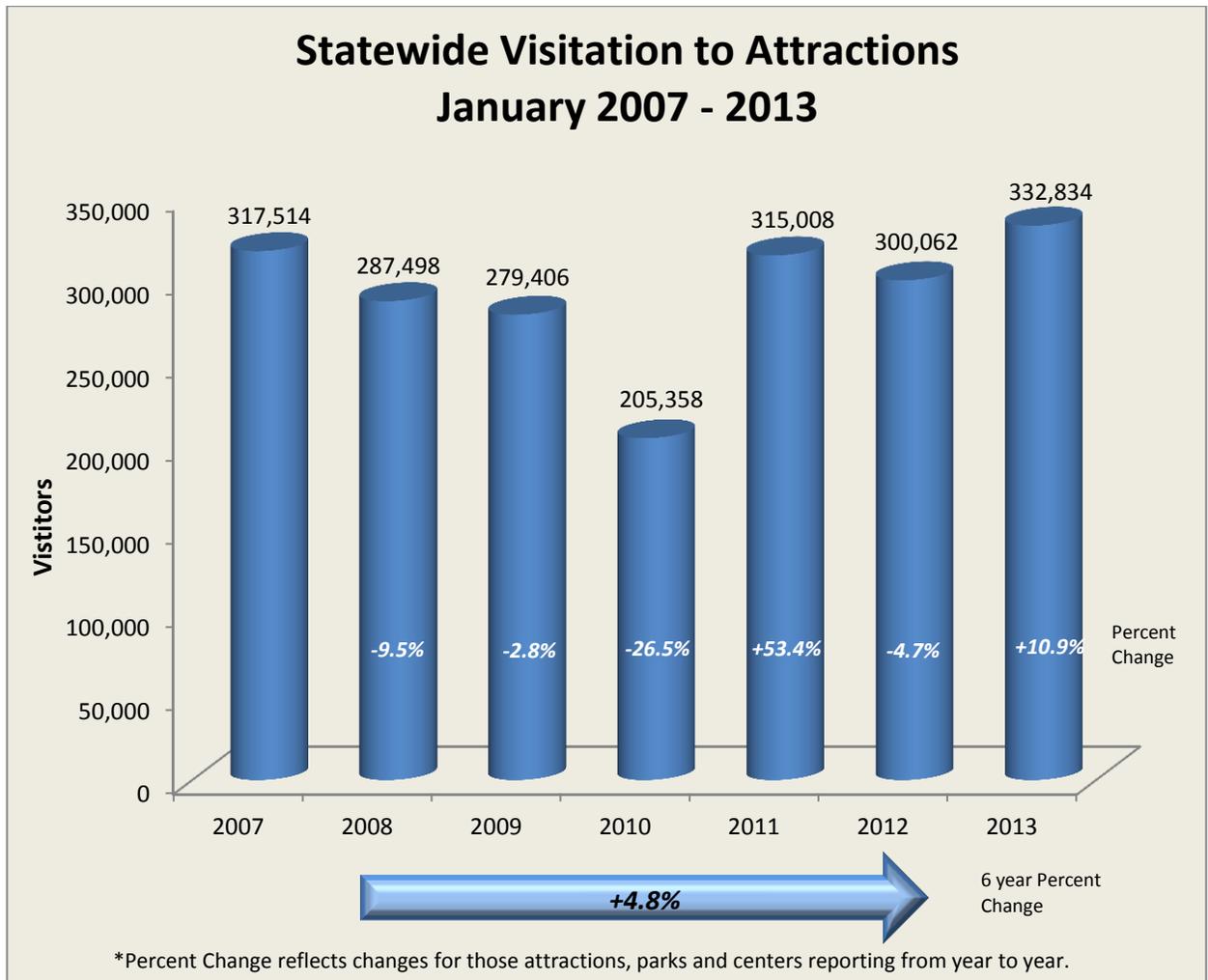


Chart 6 provides a status of the attractions industry in North Carolina for the month of January for the last seven years. The numbers represent only a sample of North Carolina attractions that provide their attendance data, and are not intended to be considered a complete list of attractions. However, 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. Attractions for which older estimates have not been obtained are not included in percent change calculations to accurately allow for trend analysis.

January attraction attendance was up nearly eleven percent from 2012, but still higher than the last seven years. January attraction attendance has increased nearly five percent since 2007.

Chart 7 – Statewide Visitation to Attractions Monthly History 2009 – 2013

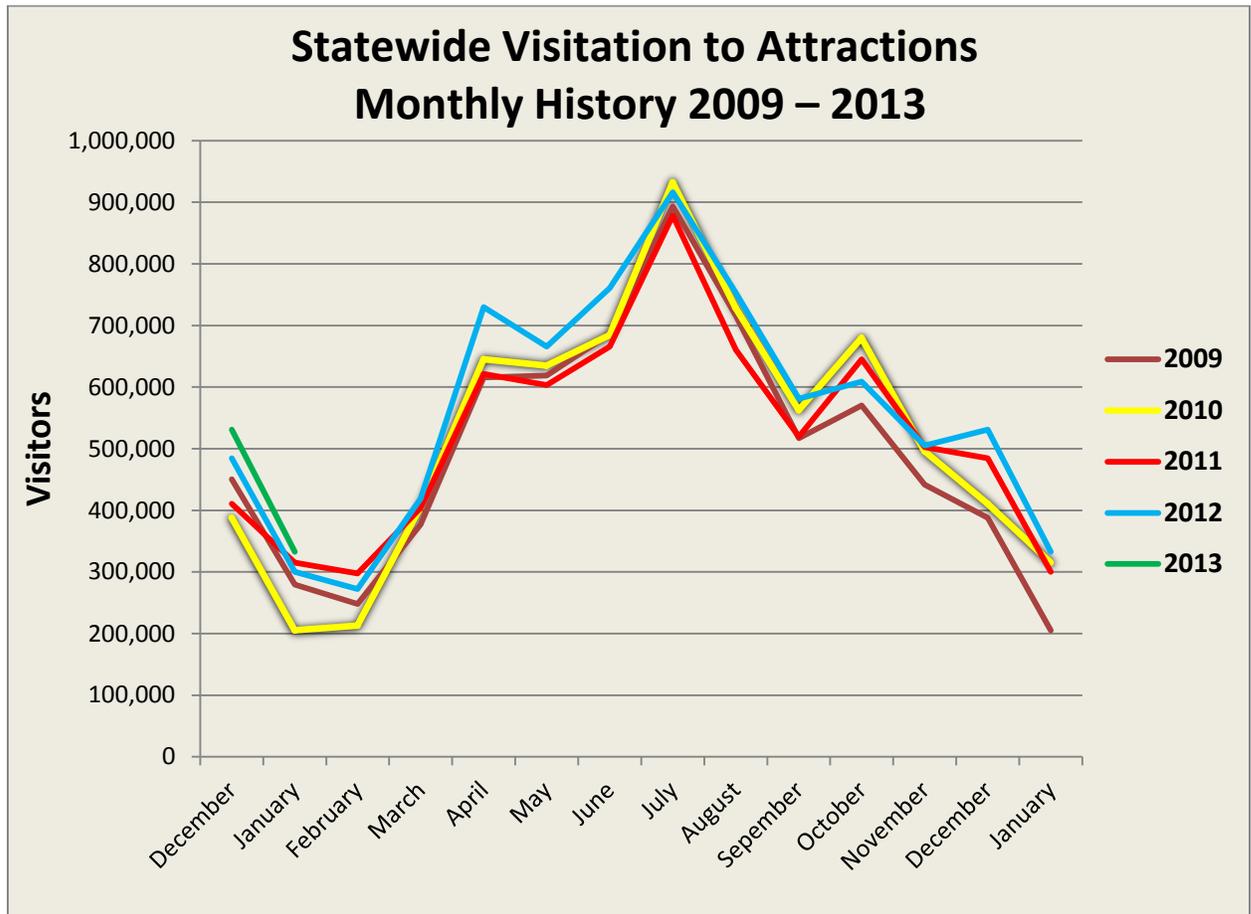


Chart 7 shows a monthly trend of attraction visitation for each of the last five years. This chart allows for a view of the ebb and flow of monthly attraction attendance, while also providing a look at how attendance compares to the same month of the previous years. Not surprisingly, the winter months see lower 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.

Chart 8 – State Welcome Center and Local Visitor Center Attendance - January 2008 – 2013

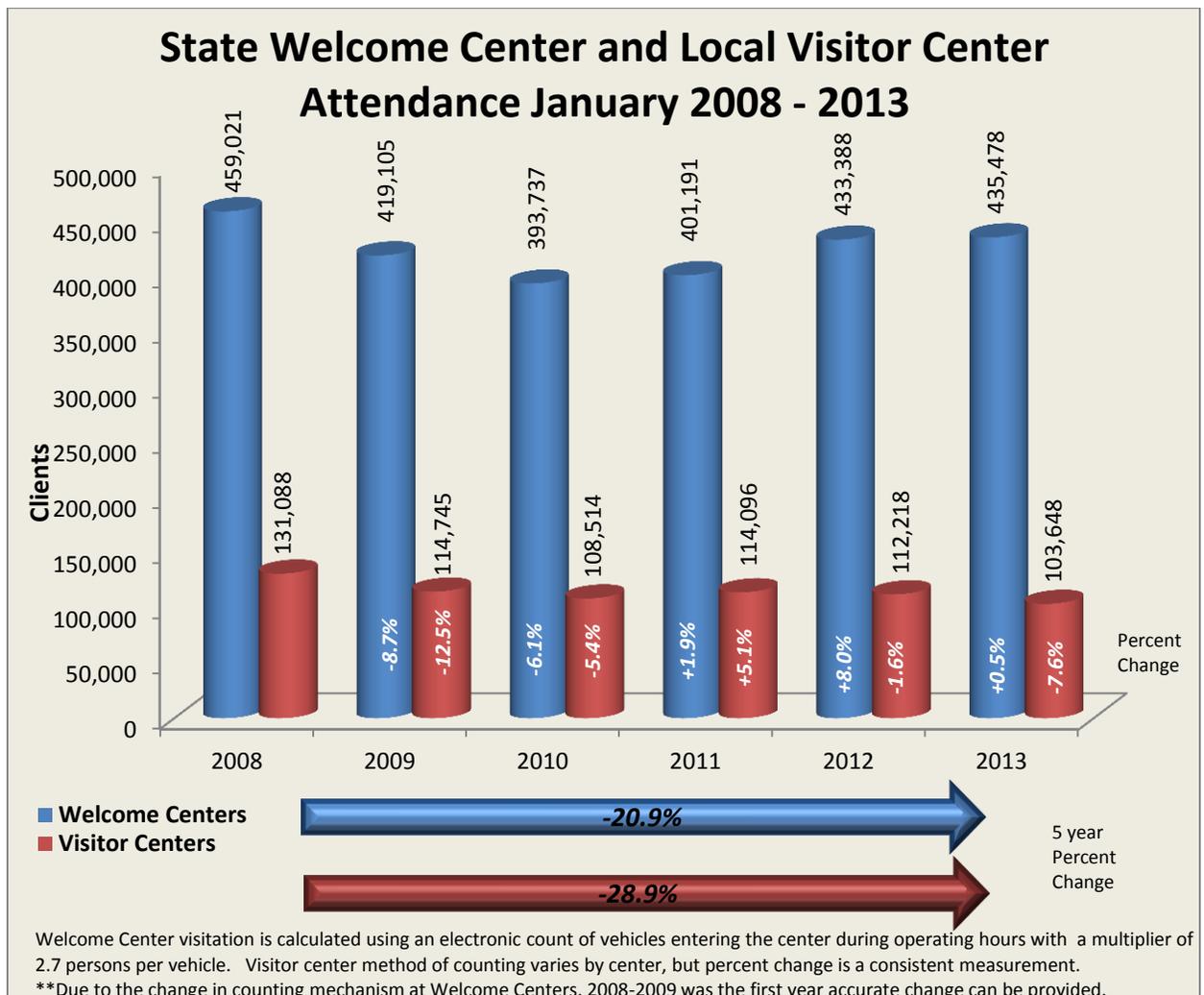


Chart 8 provides January visitation statistics for State Welcome Centers, as well as Local Visitor Centers throughout North Carolina. It should be noted that while there is a percent change indicated for welcome centers for 2007-2008 and 2008-2009, 2008 was the first year a percent change could accurately 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.

January welcome center visitation was flat statewide from last year, while local visitor center visitation was down about seven percent.

Chart 9 – Statewide National and State Park Visitation - January 2007 – 2013

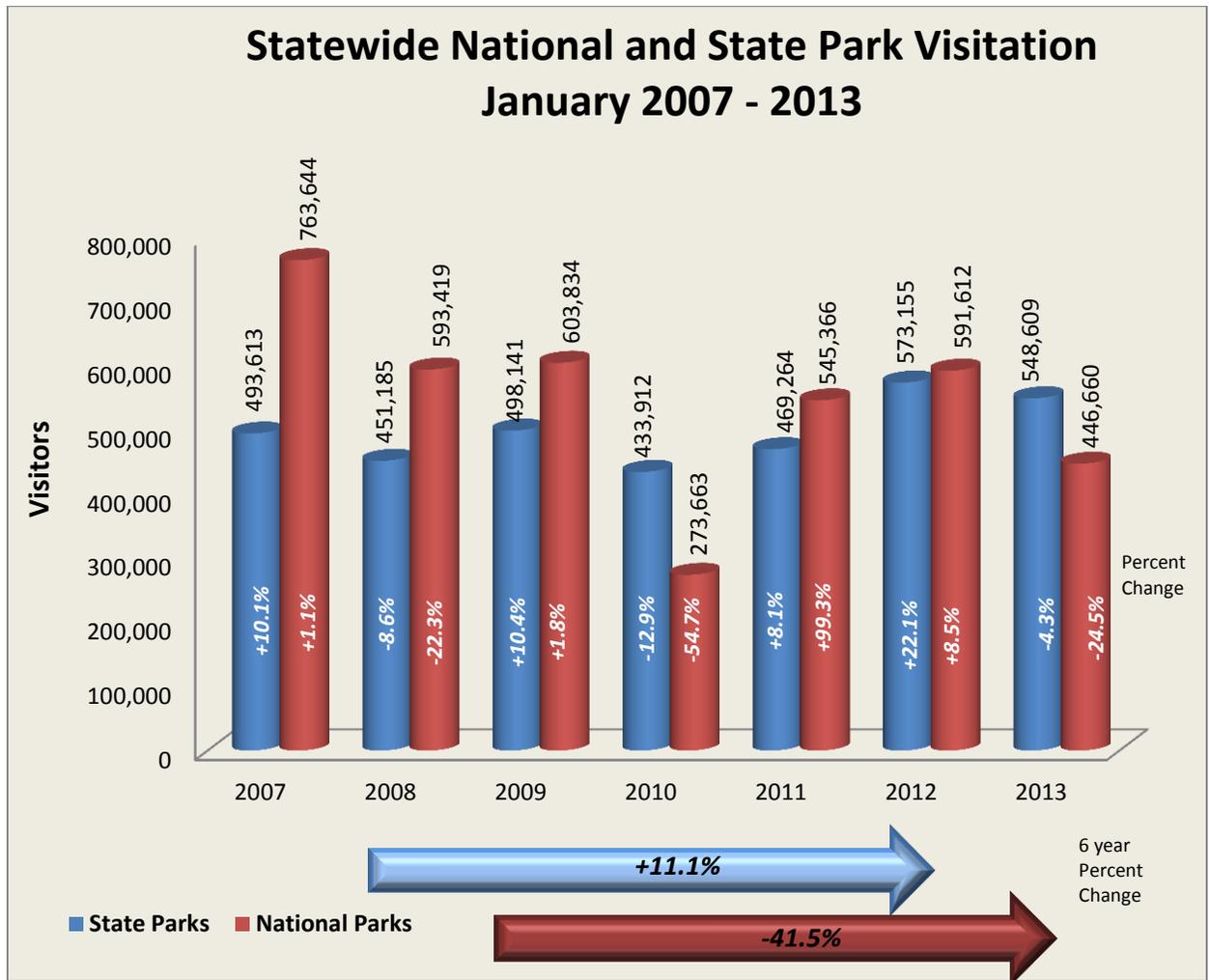
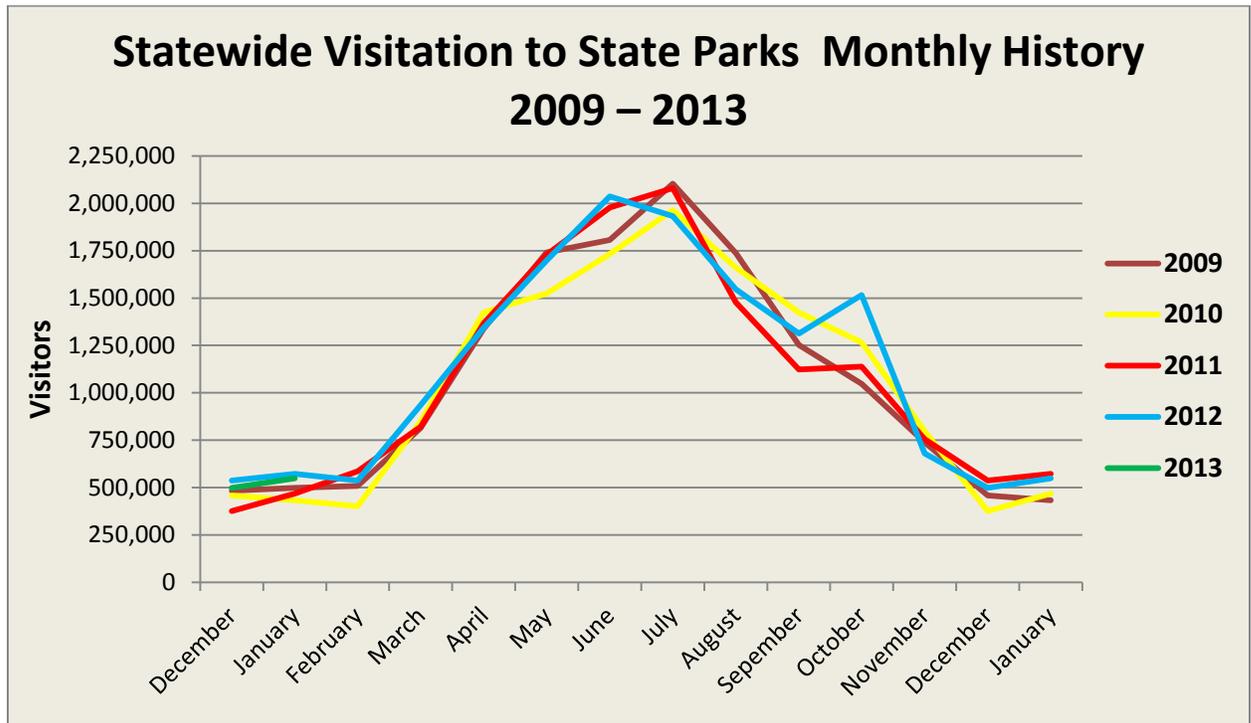


Chart 9 depicts visitation to state and national parks in North Carolina for the last seven years months of January. While both national and state park visitation was down for the month from last year, visitation to state parks is up eleven percent over the last six years.

Chart 10 – Statewide Visitation to State Parks Monthly History 2009 – 2013



Similar to Chart 7, Charts 10 and 11 provide a monthly trend of state and national park visitation for each of the last seven 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 2009 – 2013

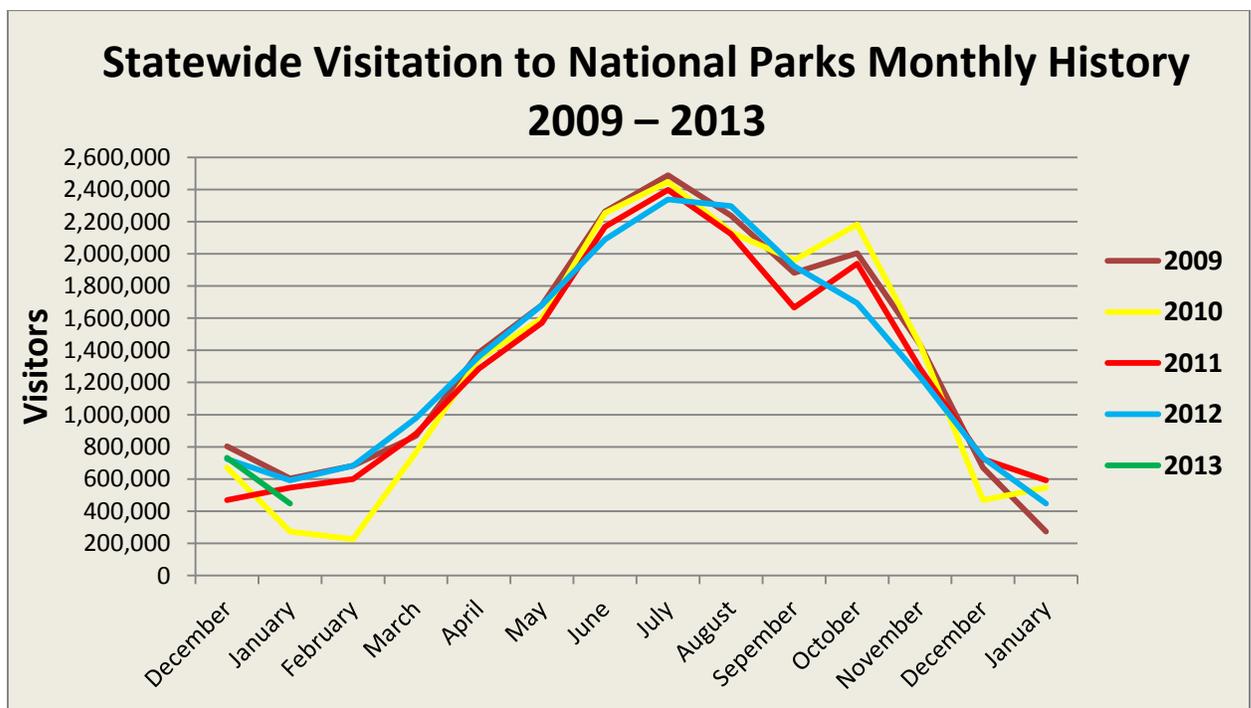


Chart 12 – Statewide Historic Sites Visitation - January 2009 – 2013

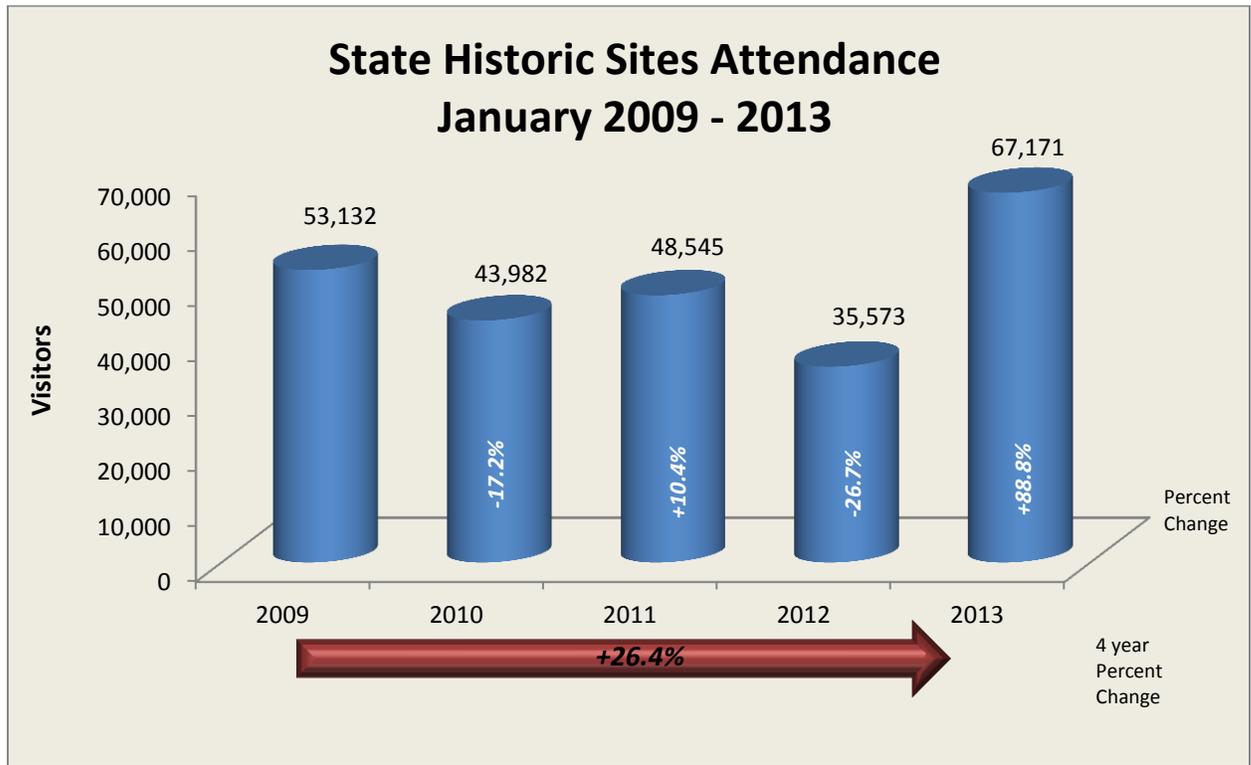


Chart 12 depicts visitation to State Historic Sites in North Carolina for the last five years of January. As this report has just begun tracking historic site visitation, more data is needed to determine the trend, however, January 2013 showed an extremely positive increase in statewide historic site visitation.

Chart 13 – Statewide Visitation to State Historic Sites History 2009 – 2013

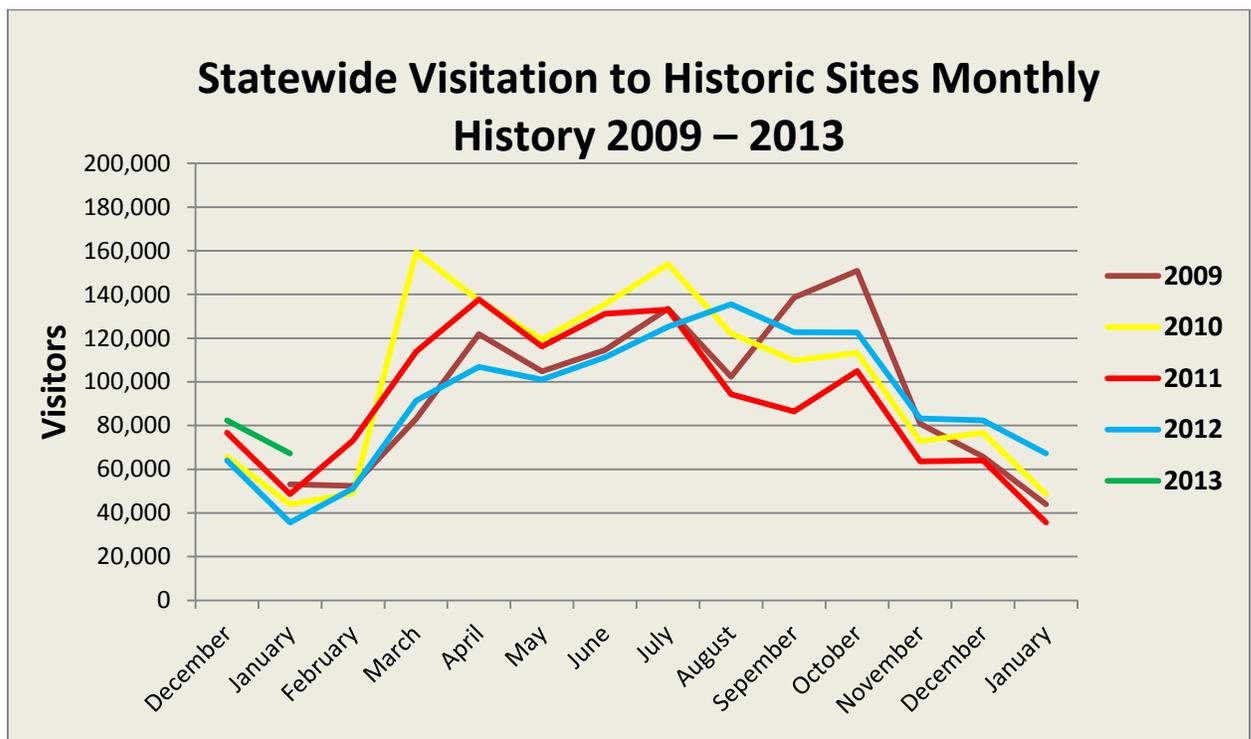


Chart 14 – Statewide Airport Arrivals and Departures - January 2007 – 2013

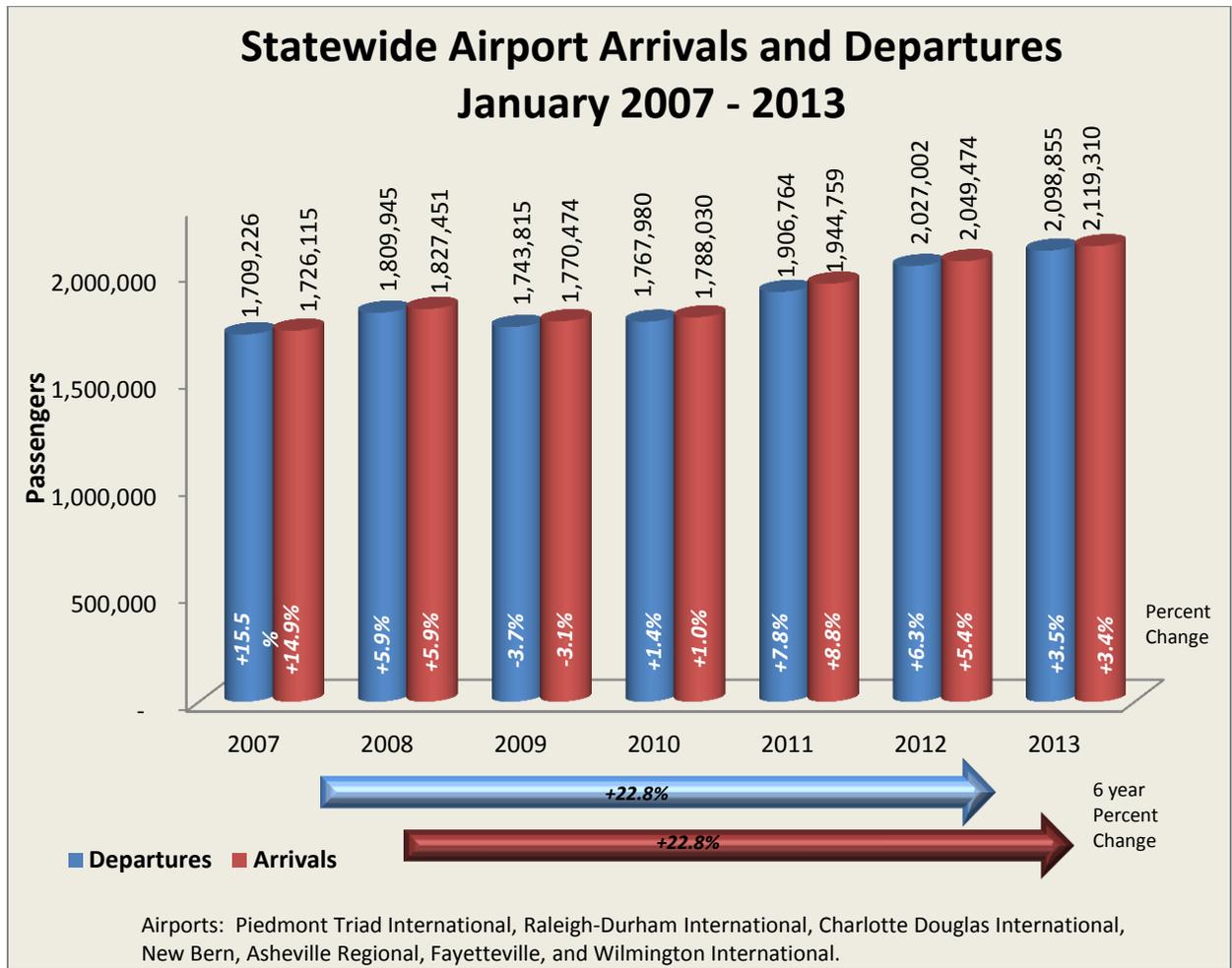


Chart 14 shows January airport arrivals and departures for each of the previous seven years. Both arrivals and departures were up three percent in January 2013 from 2012 and there has been a substantial six-year increase in both for the month of January.

Chart 15 – Lower Atlantic Average Monthly Retail Gas Prices for Unleaded – January 2006 – 2013

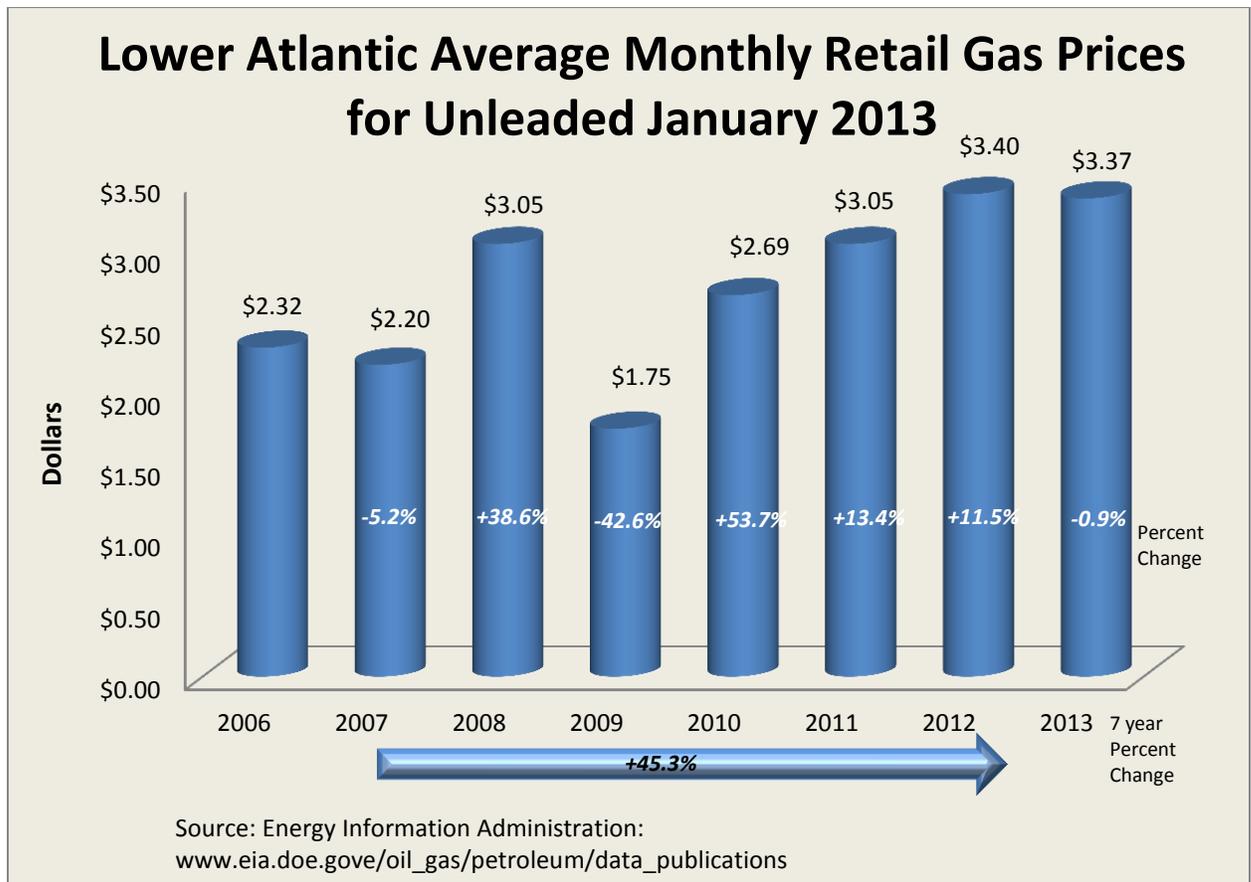


Chart 15 provides the average price per gallon of unleaded gasoline for January 2013 and the same month from the seven previous years. The data provided above, when compared with other indicators such as attraction attendance and visitor spending data, can be very helpful in the analysis of general travel trends. Fuel prices in January 2013 down about one percent from last January, but still up over forty percent over the last seven years.

Chart 16 – North Carolina Average Temperature and Precipitation – January 2008 – 2013

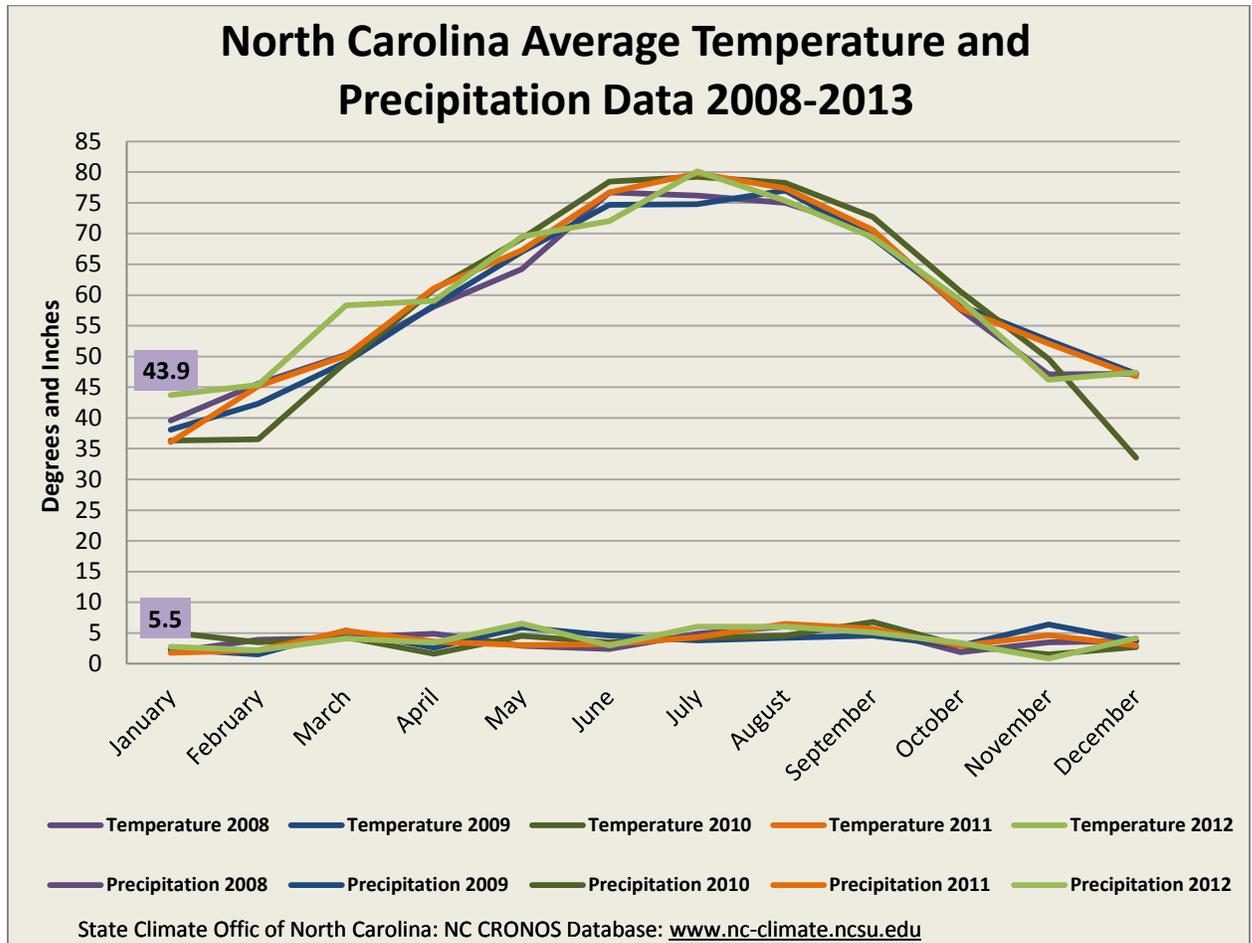


Chart 16 provides 48 months of air temperature and precipitation. This data, when analyzed together with gas price data and other tourism indicators, can be valuable in determining possible reasons for significant increases and/or decreases in indicators. For instance, greater than normal precipitation during a particular month can often help explain decreases in attendance at outdoor attractions.

The average temperature in January was about normal, while precipitation for the month was up nearly three inches from 2012.

Section 2 – Geographic Marketing Region (Coastal/Piedmont/Mountain) Tourism Indicator Analysis for January 2013

Chart 17 – Hotel/Motel Statistics by Geographic Region - January 2013

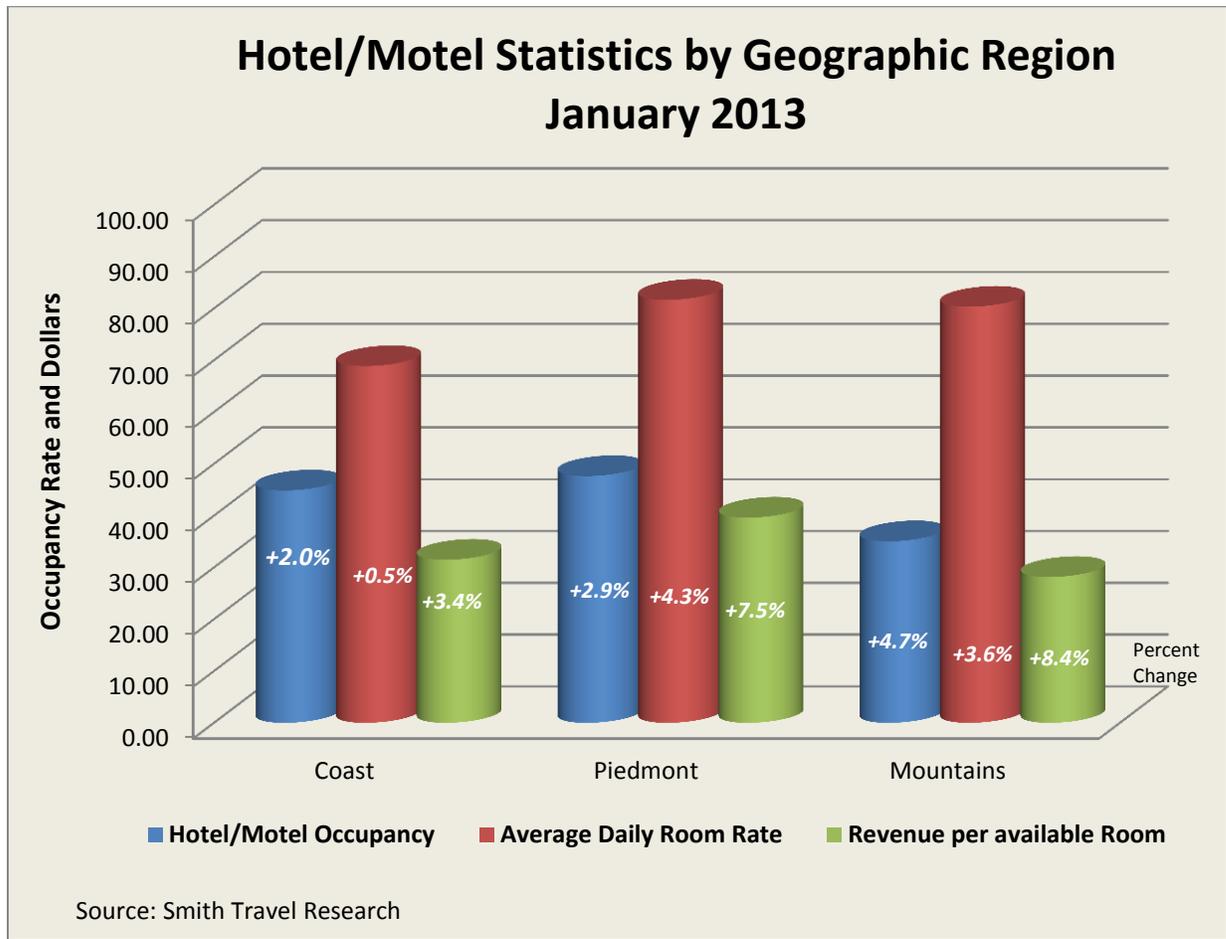


Chart 17 provides a one year comparison in lodging statistics for the three geographic marketing regions of North Carolina in January. Lodging indicators statewide were positive in January, Mountain Region occupancy was up nearly five percent from 2012, and the region’s RevPAR was up over eight percent from last January.

Chart 18 – Hotel/Motel Room Demand by Geographic Region - January 2013

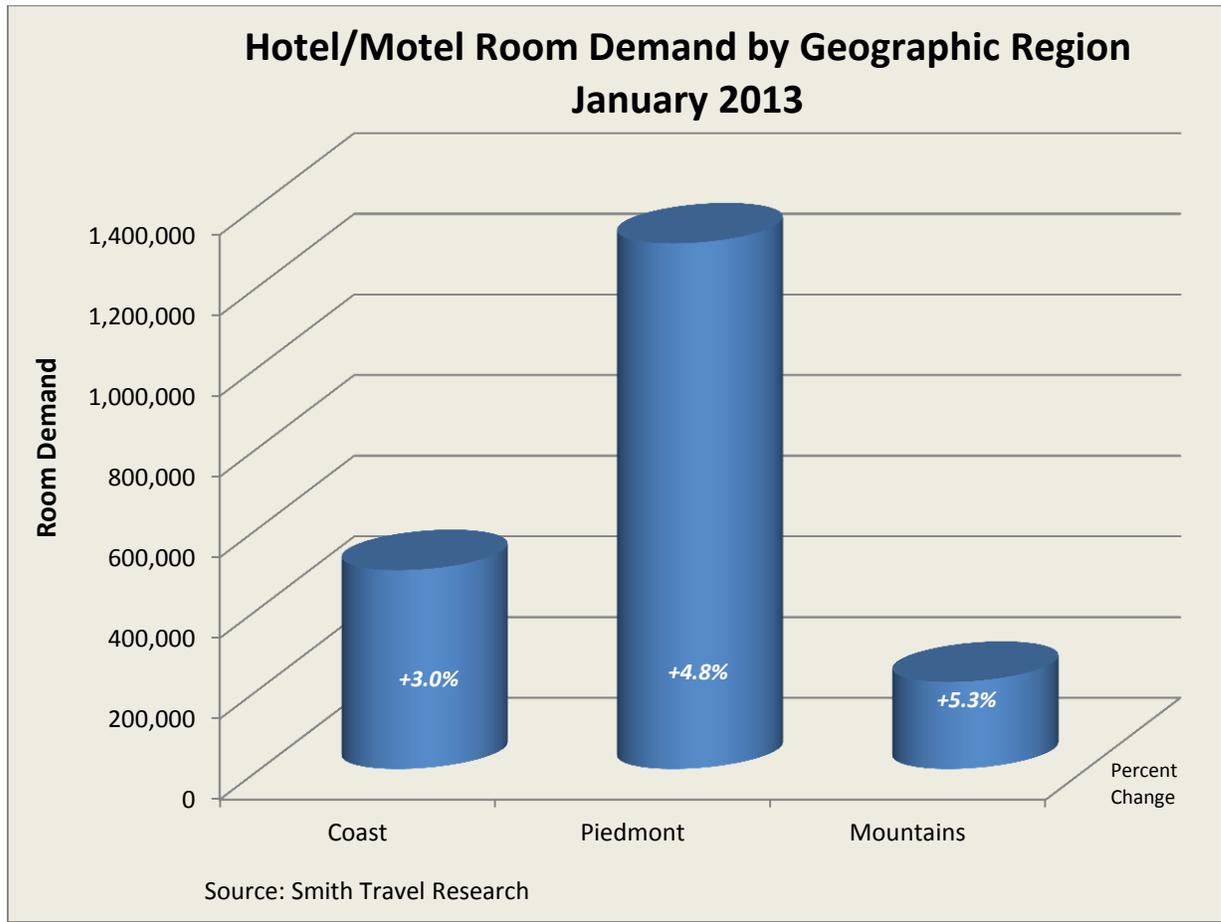


Chart 18 provides hotel/motel demand by geographic region for January 2013. Demand differs from occupancy in that it is the total number of rooms sold, not accounting for differences in room supply. All three geographic regions had positive increases in lodging demand from January 2012 to January 2013, particularly the Mountain Region (+5.3%).

Chart 19 – Visitation to Attractions, Parks and Historic Sites by Geographic Region – January 2013

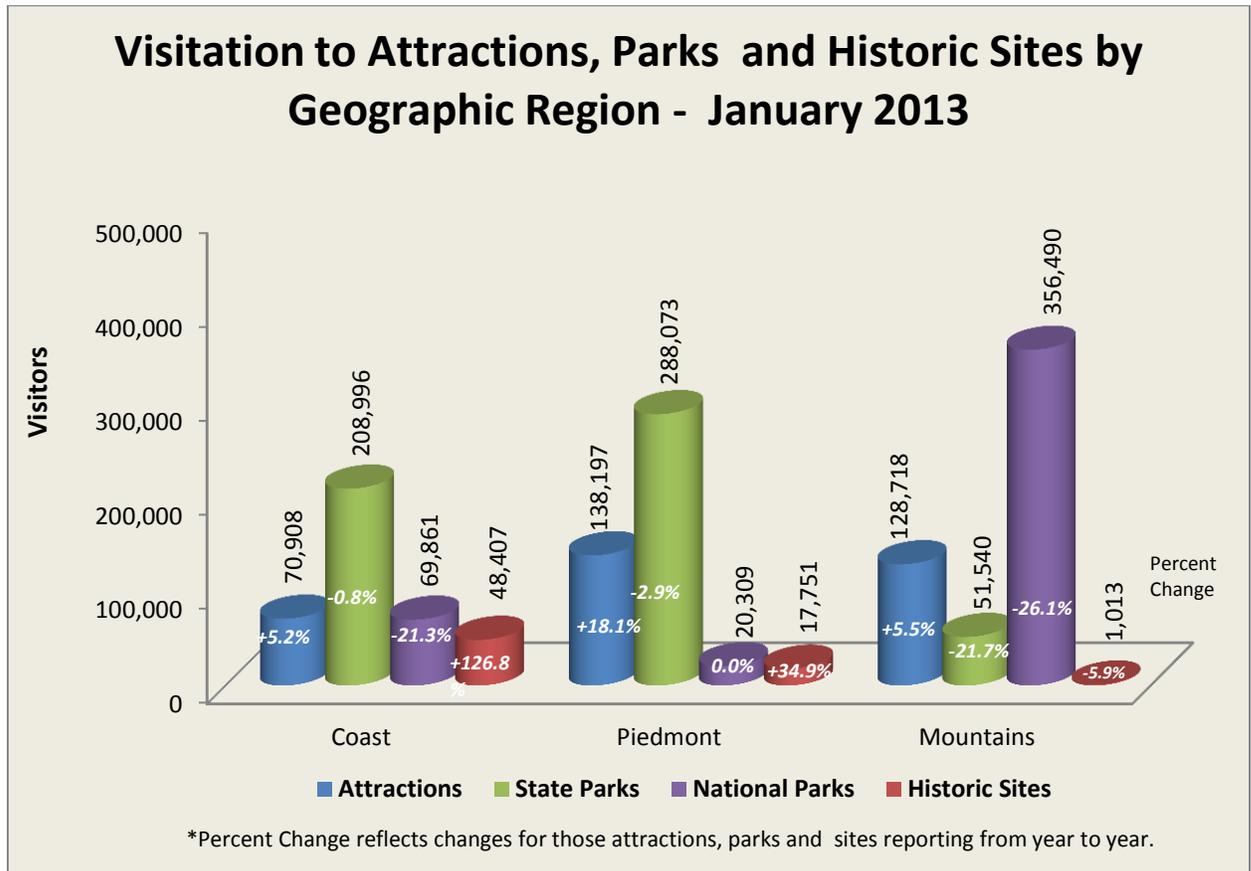


Chart 19 provides a look at the attractions industry in North Carolina in January 2013 by geographic region. As with the statewide numbers, the following data represents only a sample of North Carolina attractions that provide their attendance data, and are not intended to be considered a complete list 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.

January attendance growth for attractions and parks varied by region. While attraction attendance increased in all three regions, park attendance was down. Historic site attendance was up in the Coastal and Piedmont regions, but down in the Mountain Region.

Chart 20 – State Welcome Center and Local Visitor Center Attendance by Geographic Region –January 2013

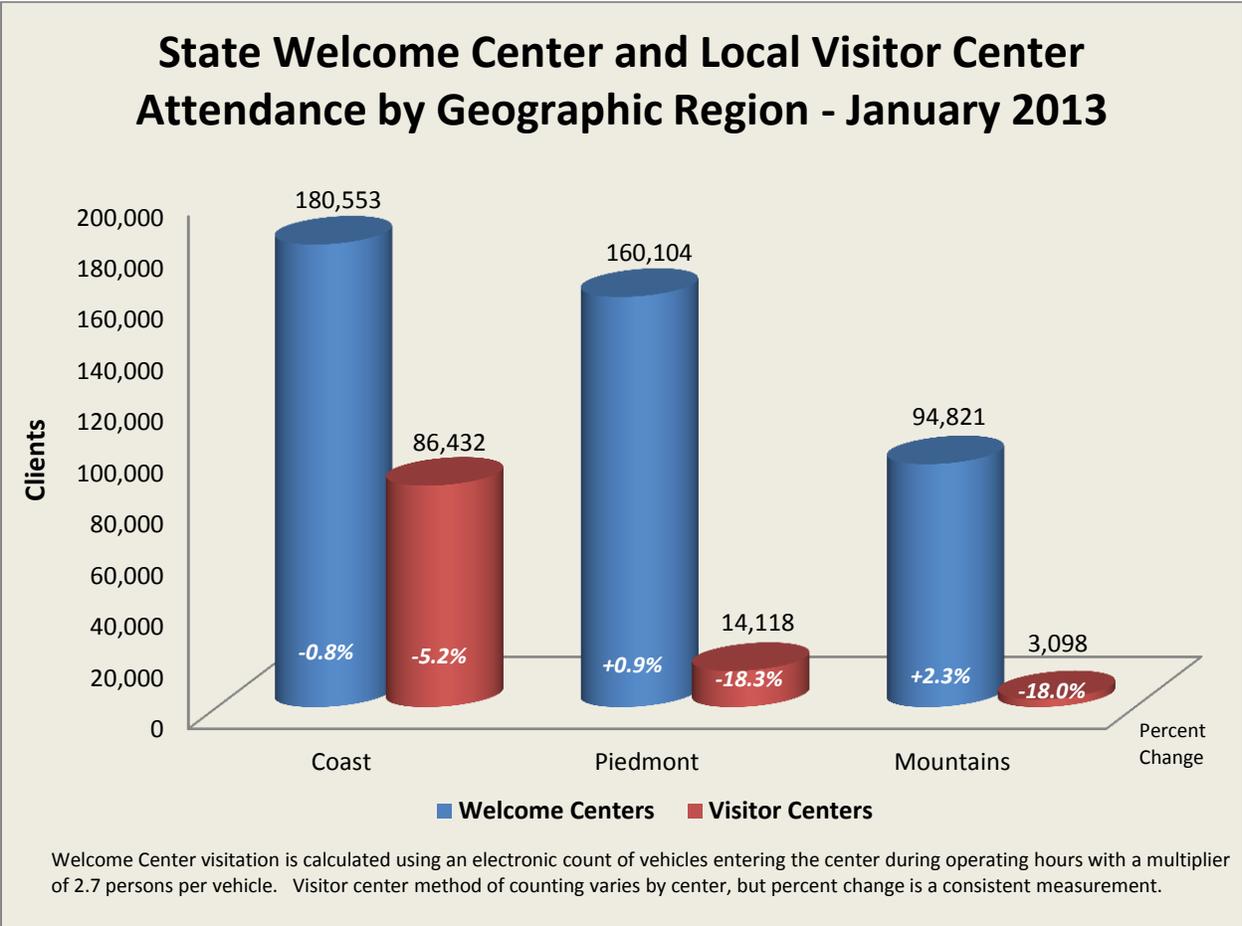


Chart 20 shows welcome center and visitor center attendance by geographic region and offers comparisons from January 2012.

Chart 21 – Airport Arrivals and Departures by Geographic Region – January 2013

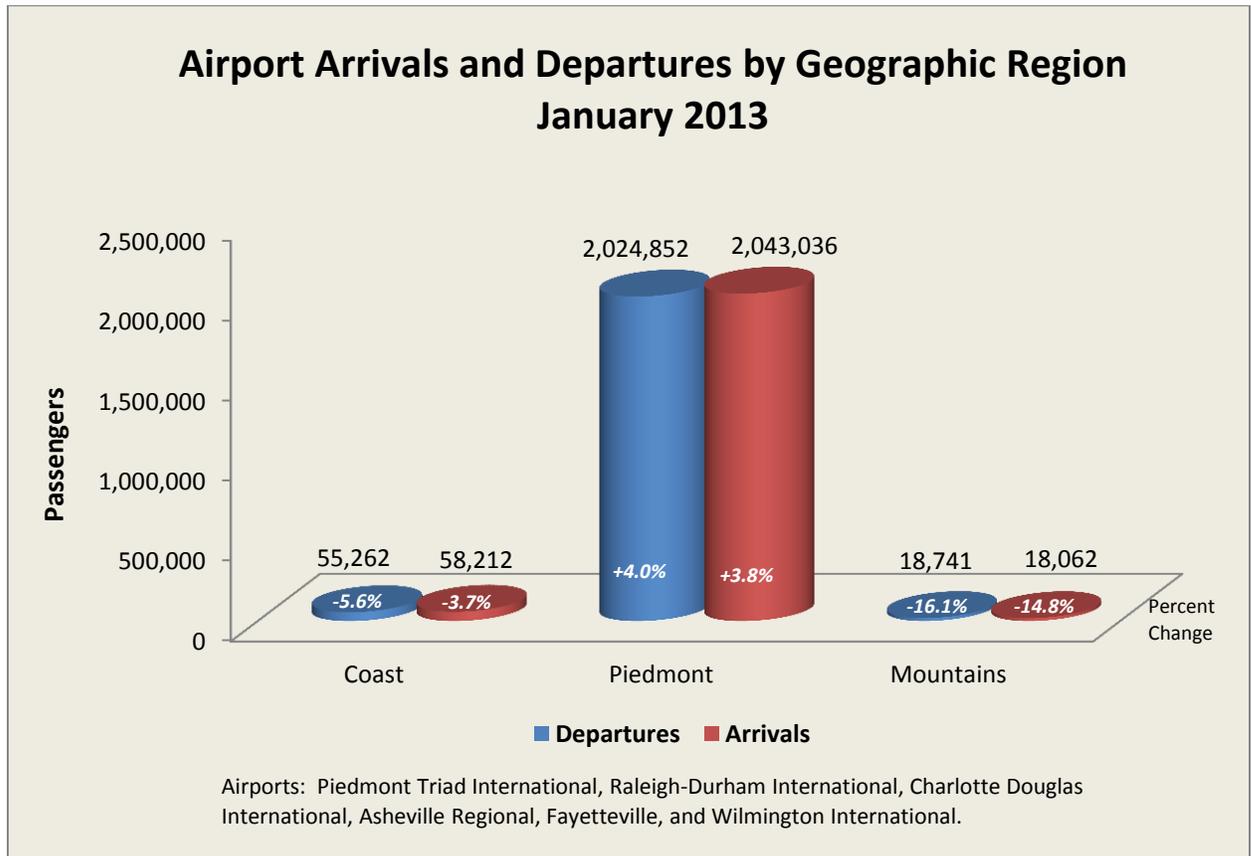


Chart 21 provides a breakdown of air travel statistics by geographic region. While the majority of air traffic is through the Piedmont Region, it is helpful to maintain a trend of other regional airport usage. The Mountain Region showed decreases in arrivals and departures from January 2012 to 2013. The discontinuation of seasonal service in the Mountain Region is one explanation for the decreases in 2012. .

Section 3: Economic Development Region Tourism Indicator Analysis – January 2013

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, Cherokee, Clay, Graham, Haywood, Henderson, Jackson, Macon, Madison, McDowell, Mitchell, Polk, Rutherford, Swain, Transylvania, Watauga, Wilkes, Yancey).

Chart 22 – Hotel/Motel Statistics by Economic Development Region - January 2013

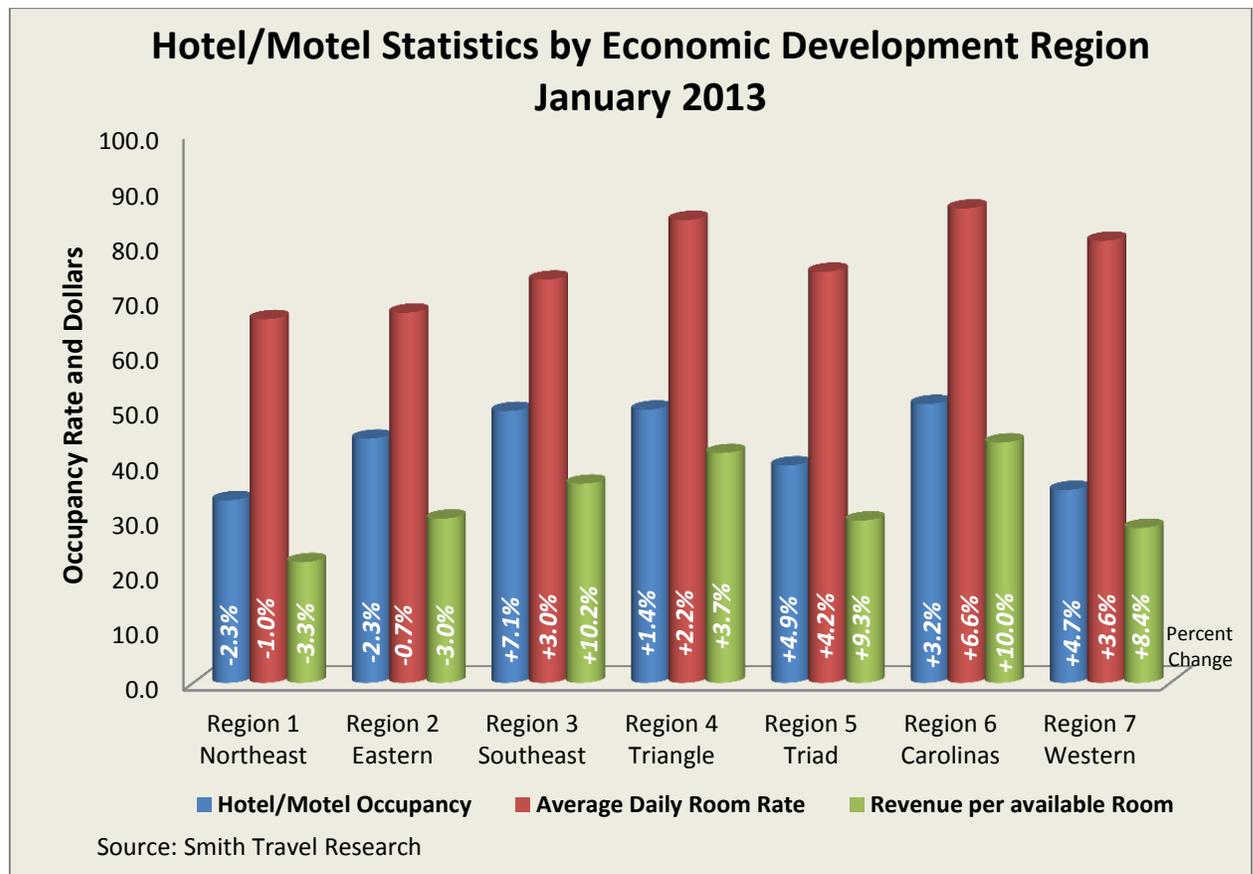


Chart 22 provides lodging indicators for January 2013 by economic development region. Also shown are percent changes from January 2012. This graph allows individual regions within the state to track indicators specific to their general destinations, while still being able to compare their data to the state data shown in Section 1.

Chart 23 – Hotel/Motel Room Demand by Economic Development Region - January 2013

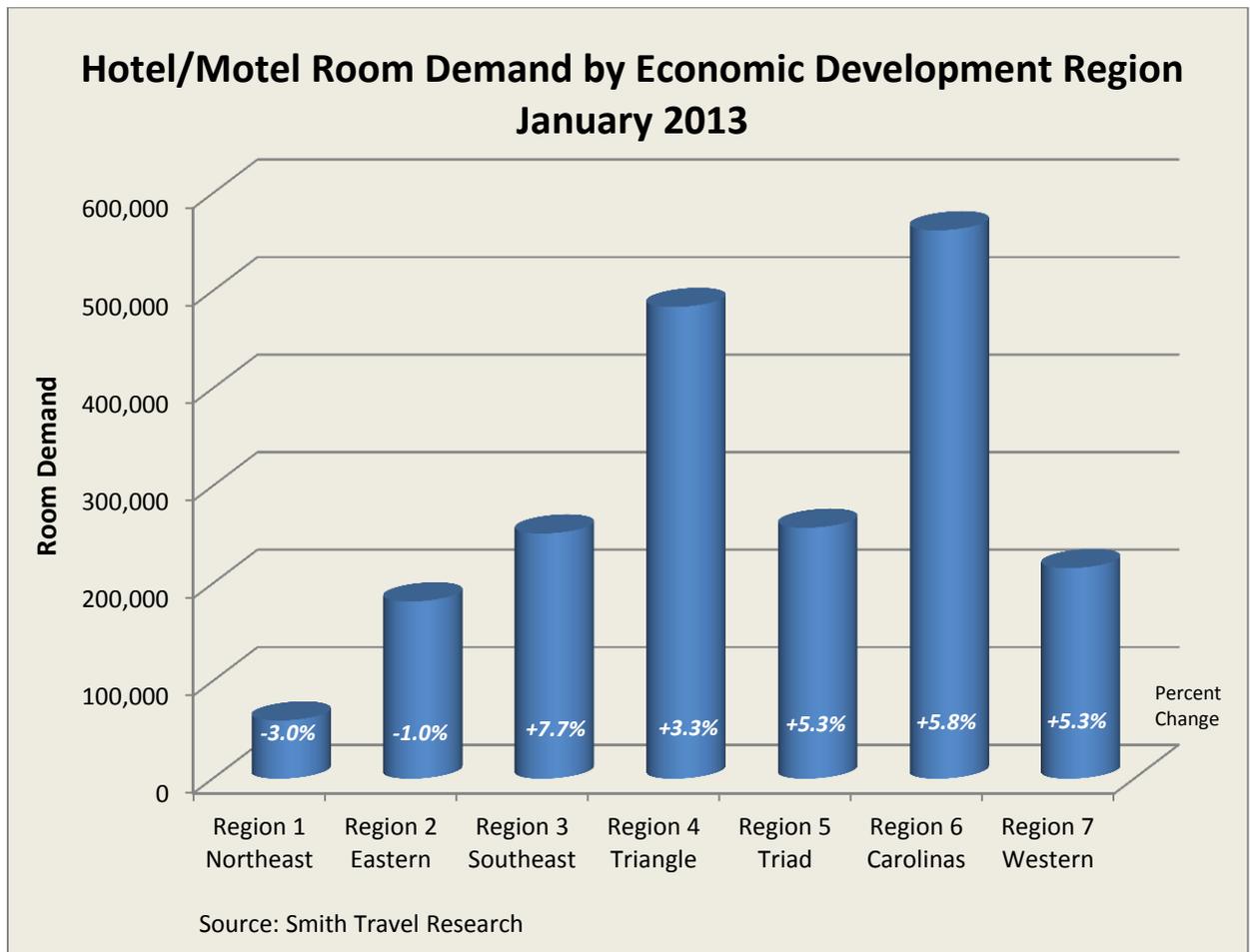


Chart 23 depicts hotel/motel demand for the month of January 2013 by economic development region. Demand is the number of rooms sold excluding complimentary rooms. Five of the seven regions experienced increased demand from January 2012 to 2013, particularly the Southeast Region.

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 24 – National Travel Price Index December 2006 – January 2013

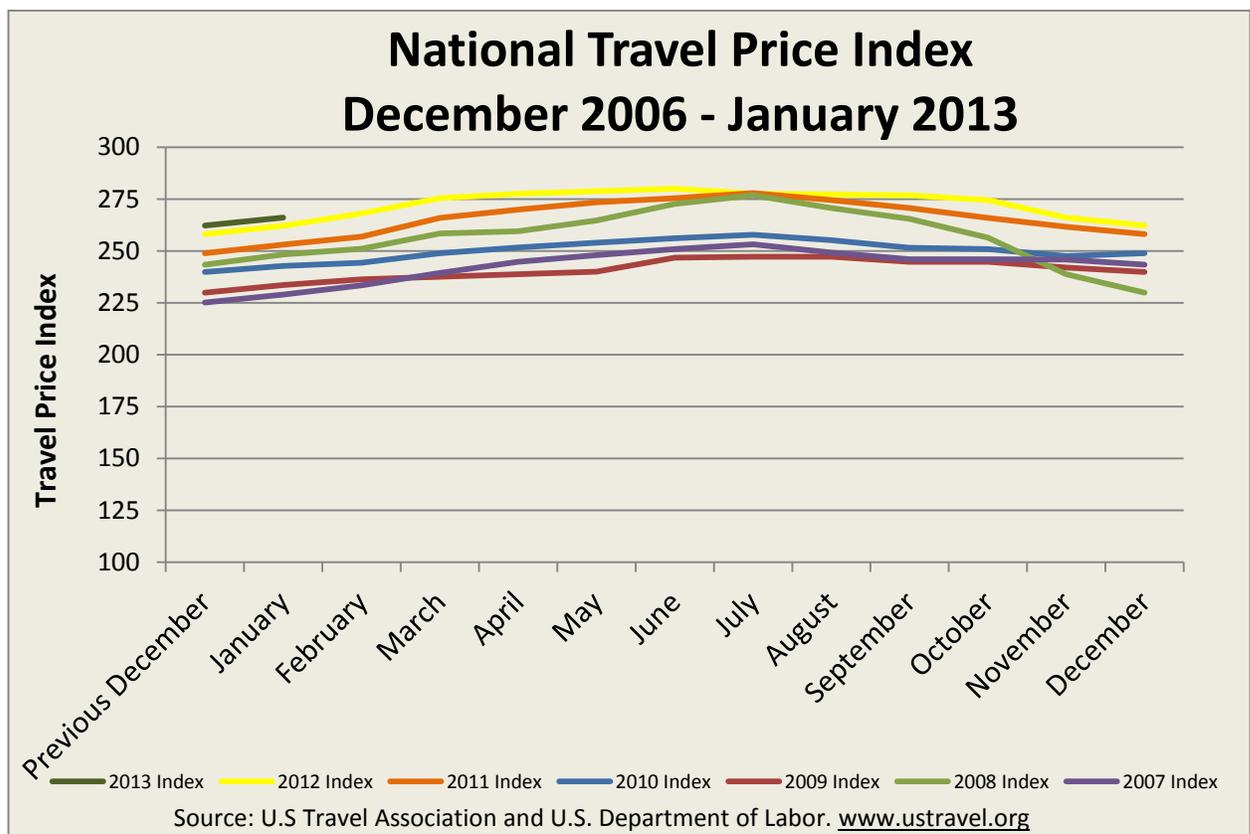


Chart 24 provides a five year trend of the National Travel Price Index (TPI). Steady growth was experienced through mid-2008; however in November 2008, it is clear that as the TPI fell below 2007 levels, the tourism industry began feeling the full effect of the recession. For most of 2009, the TPI remained slightly at or below the 2007 level. In December 2010, the TPI finally inched above the each of the previous Decembers from 2007, and continued that year-over-year growth into June 2011. Growth slowed during the summer months to be just barely above the TPI of July 2008, but has since moved to above all previous six years. January saw a slight decrease in travel prices from last January.

*Hotel/Motel statistics are from Smith Travel Research, Inc.; all other figures are from the Division of Tourism.
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