



November 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 November 2010

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

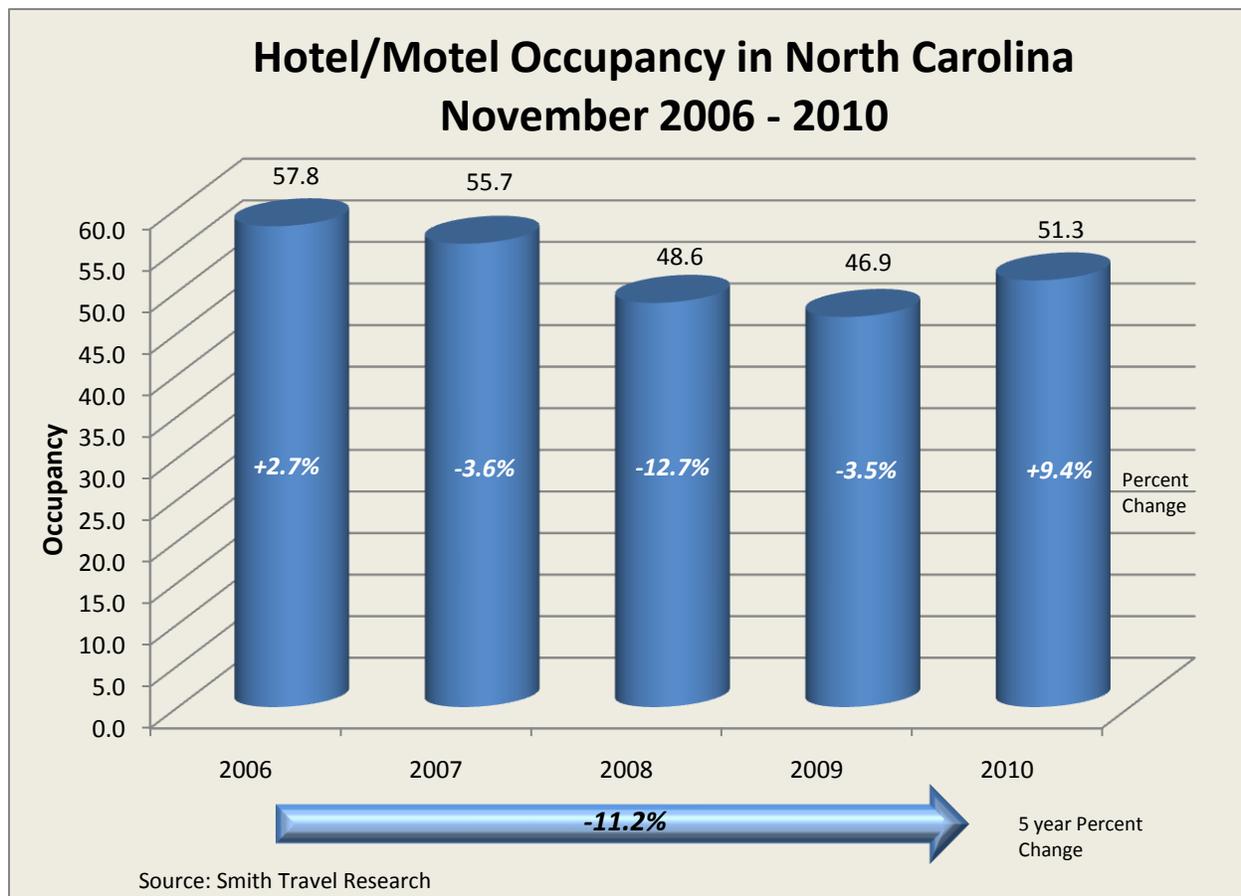


Chart 1 provides a comparison over a five year period to show the trend of occupancy in the state for the month of November. Occupancy for November 2010 was up over nine percent from November 2009. This was the tenth consecutive month of year over year positive occupancy growth. *Occupancy at the national level increased by nine percent in November 2010 from the previous year.*

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

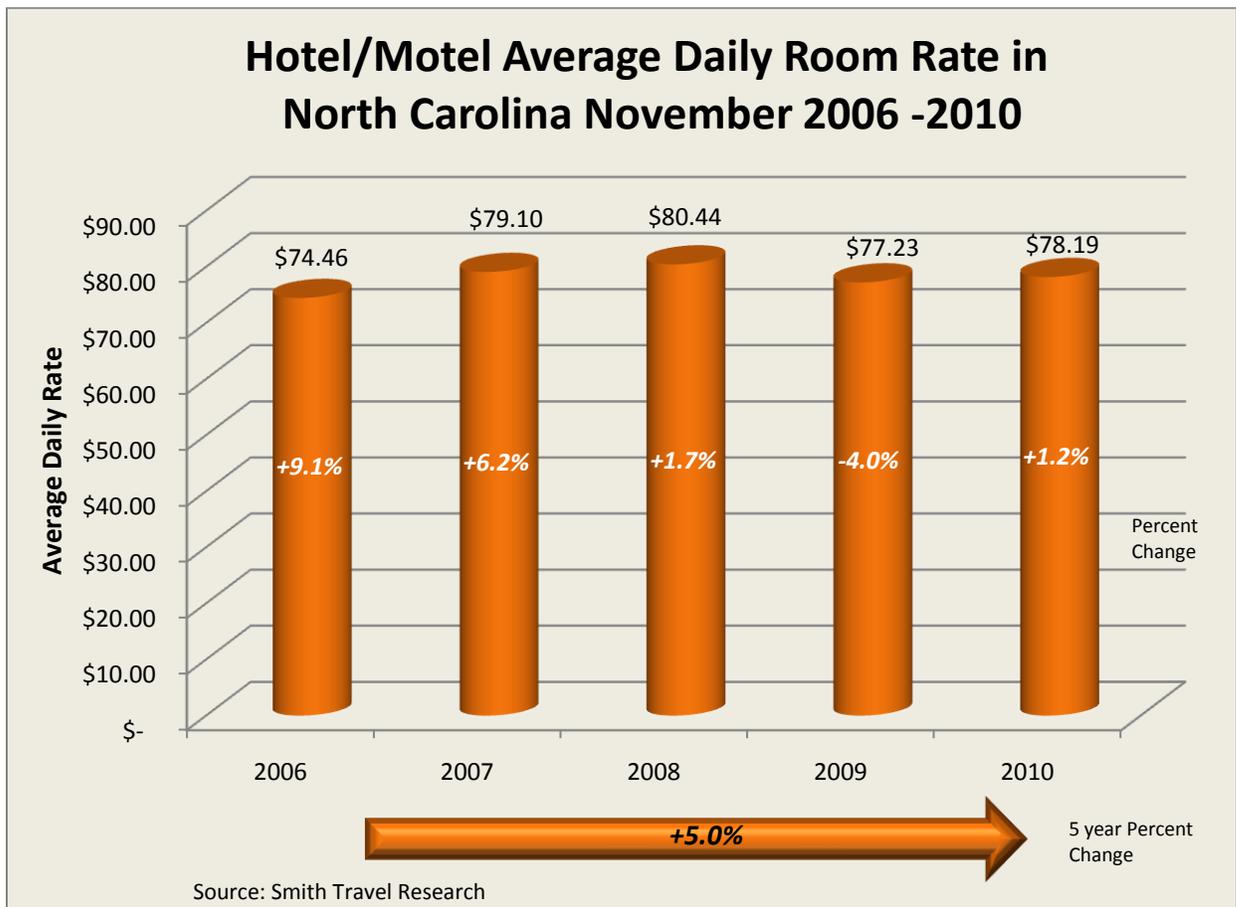
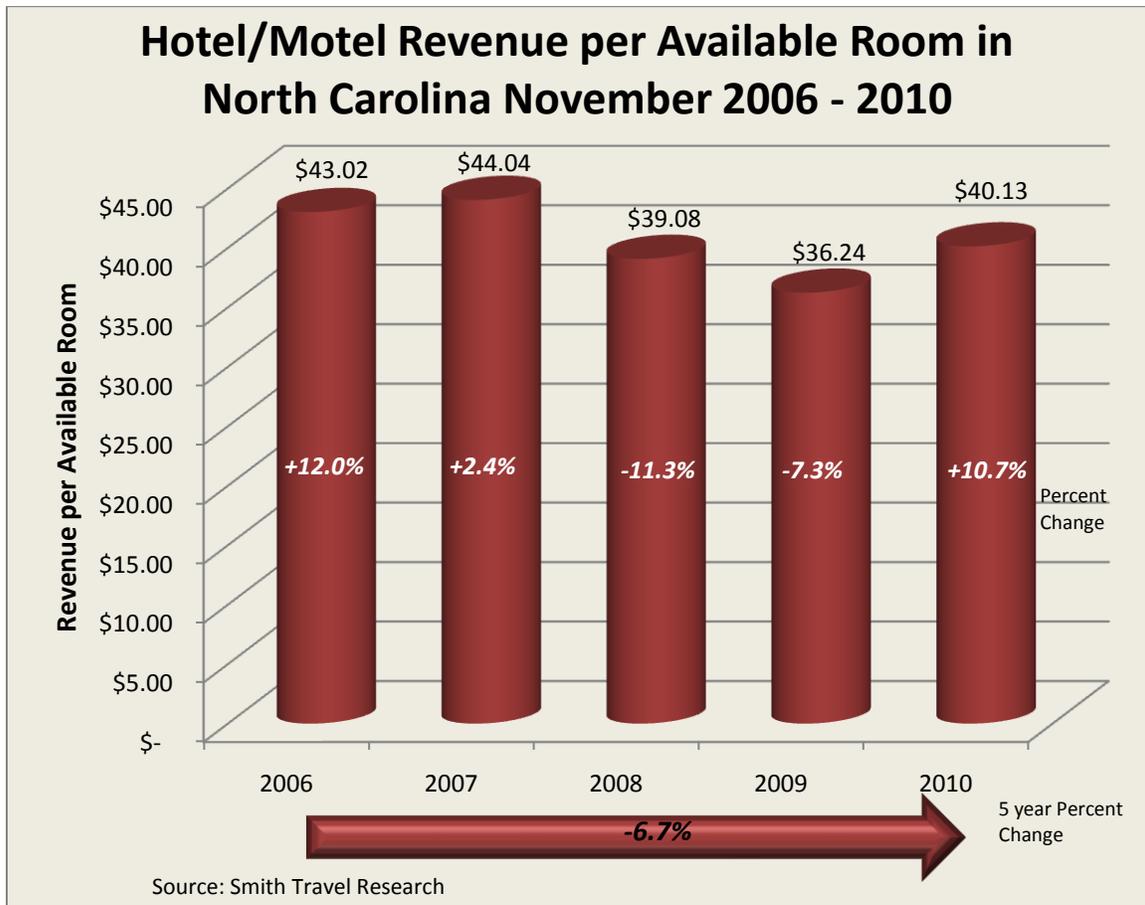


Chart 2 provides a comparison over a five year period to show the trend of average daily room rate (ADR) in the state for the month of November. After peaking in November 2008, ADR for the past two years has decreased nearly three percent, but appears to be on the rebound with an increase this month. *ADR at the national level was up 2.5% in November 2010 from the previous November.*

Chart 3 – Hotel/Motel Revenue per Available Room in North Carolina - November 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 November. RevPAR was up 10.7% in November 2010, continuing the positive growth that started in March. *RevPAR at the national level was up 11.8% in November 2010 from the previous November.*

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

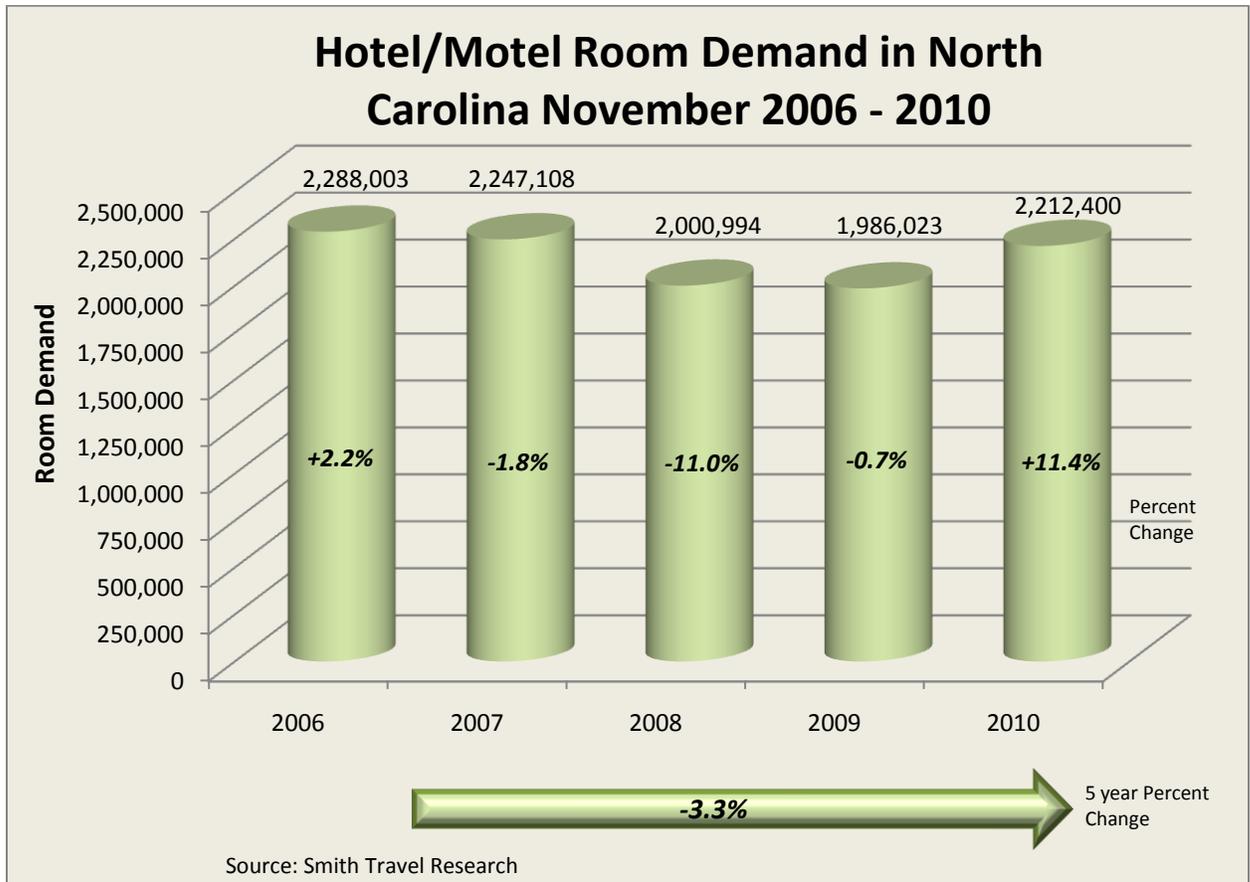


Chart 4 depicts hotel/motel demand for the month of November 2010 with comparisons to the previous four years. Demand is the number of rooms sold excluding complimentary rooms. Room demand for November was up over eleven percent from November 2009. *Room Demand at the national level saw an increase of 10.5% change in November 2010 from the previous November.*

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

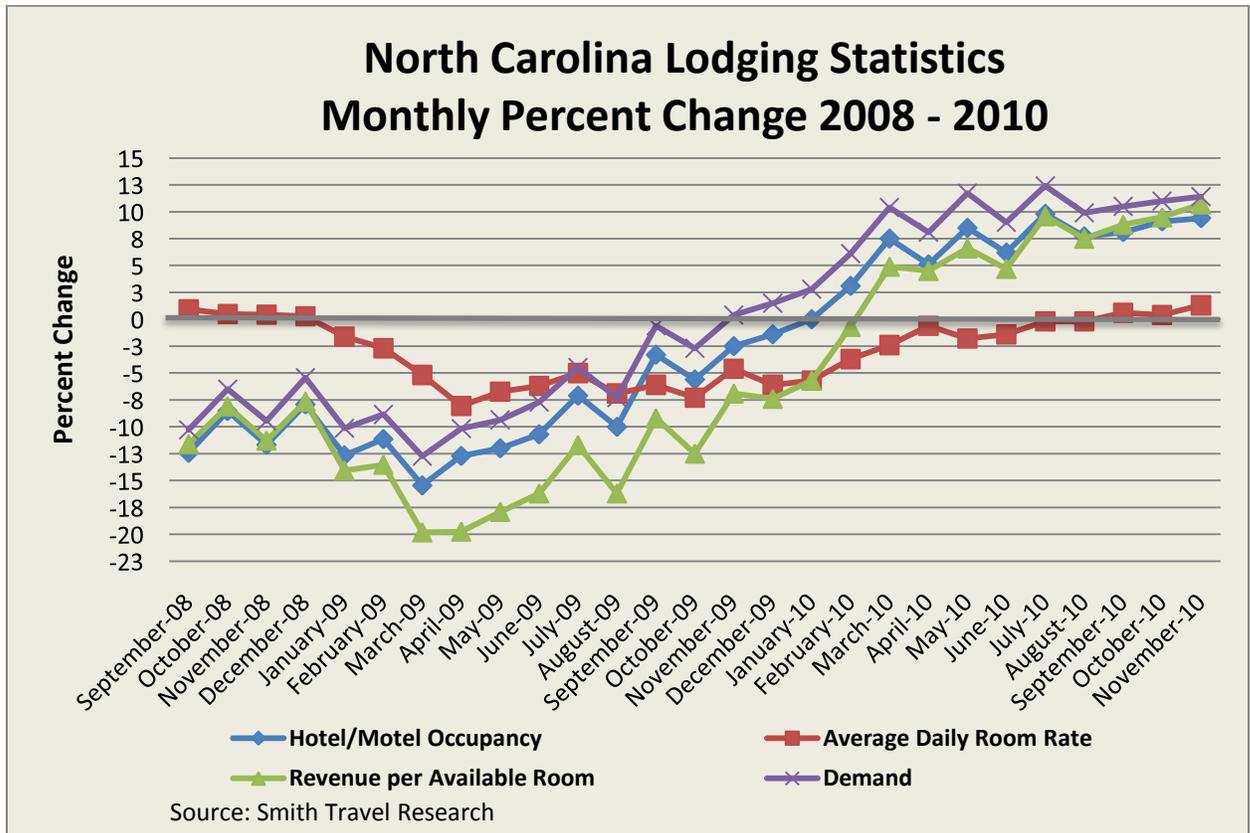


Chart 5 provides a monthly percent change for the four major lodging indicators. The chart allows for a 24 month trend-line analysis that clearly depicts that the major indicators have shown a steady positive change from 2009. After over a year of negative percent change for all indicators, occupancy and demand have shown relative increases the last few months. ADR remained in positive growth in November with a 1.2% increase from last November.

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

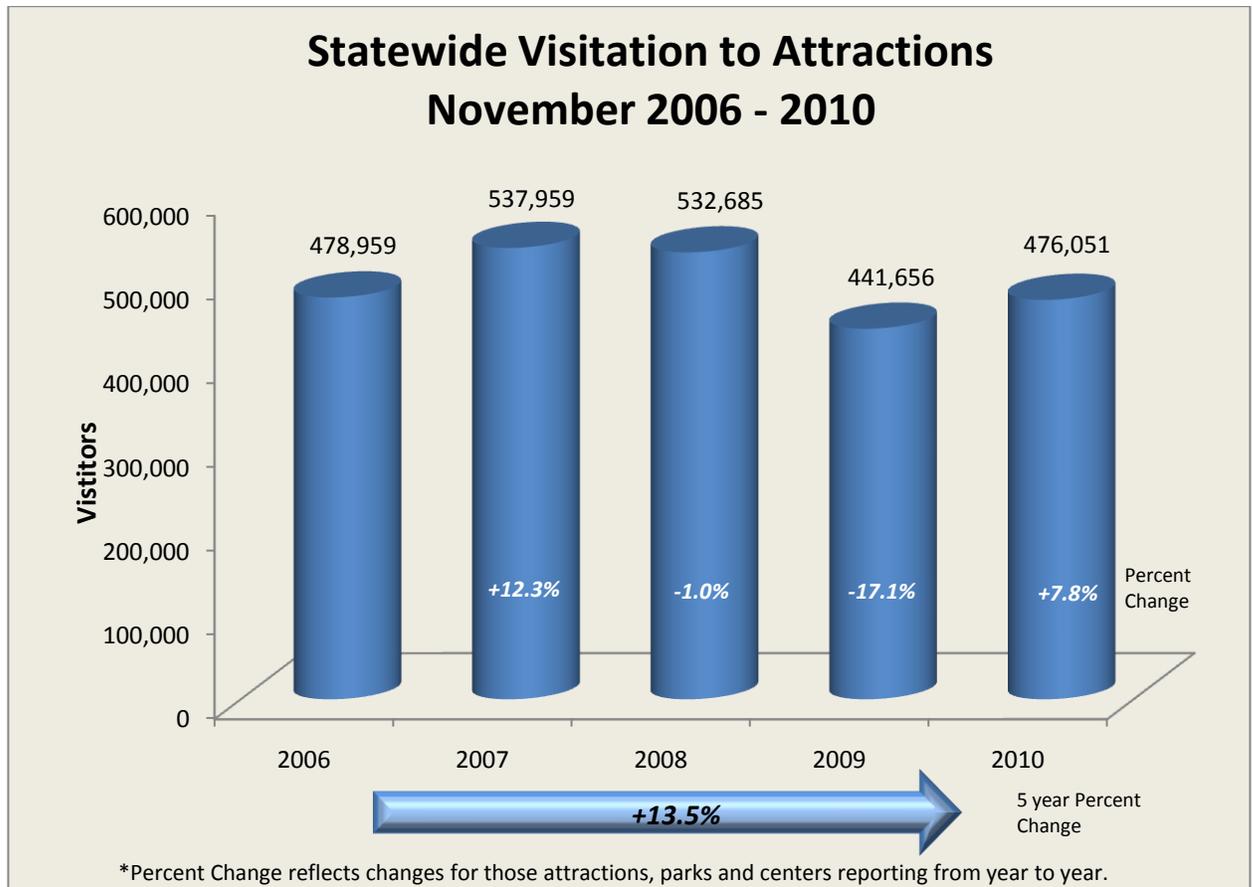


Chart 6 provides a status of the attractions industry in North Carolina for the month of November for the last five years. The numbers represent only a sample of North Carolina attractions that provide their attendance data, and are not intended to be considered a complete list of attractions. However, 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 November 2009 to November 2010.

November was a good month for NC attractions. There was an increase of over seven percent in attraction visitation from November 2009 to November 2010, and a thirteen percent increase over the last five years for November.

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

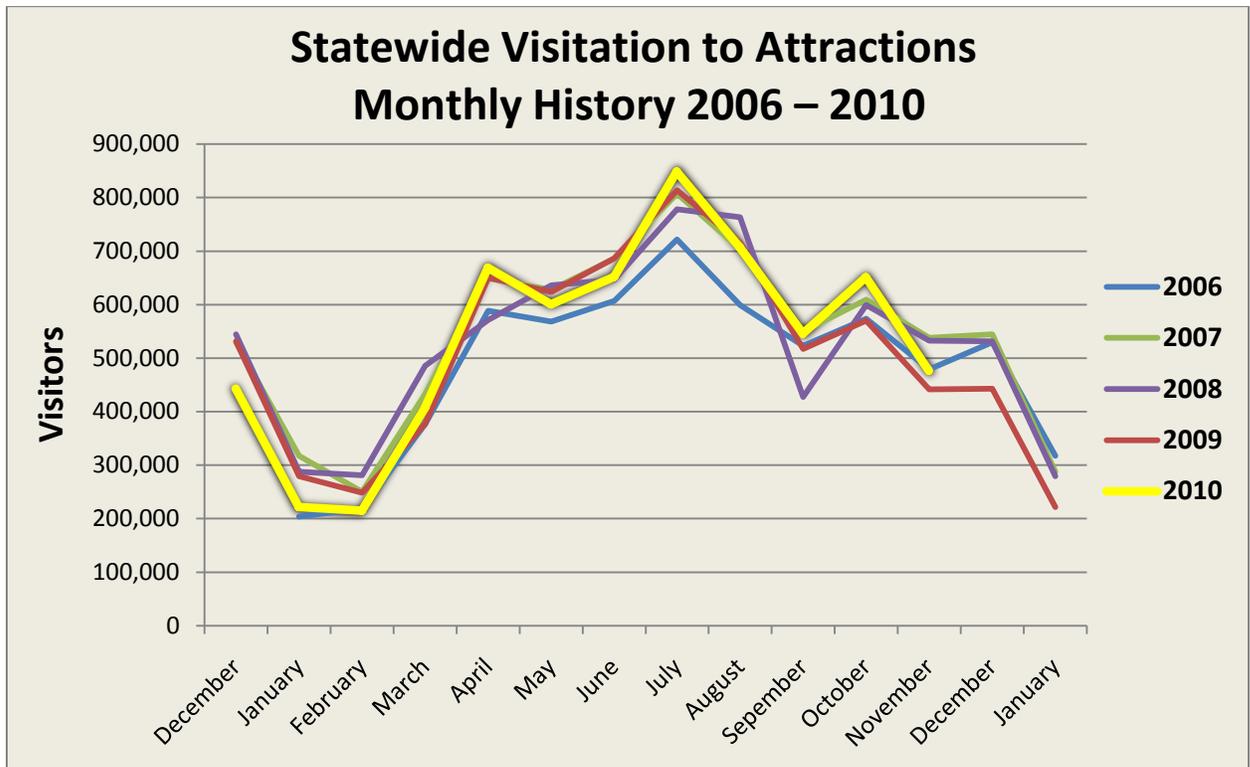


Chart 7 shows a monthly trend of attraction visitation for each of the last five years. This chart allows for a view of the ebb and flow of monthly attraction attendance, while also providing a look at how attendance compares to the same month of the previous years. Not surprisingly, the summer months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

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

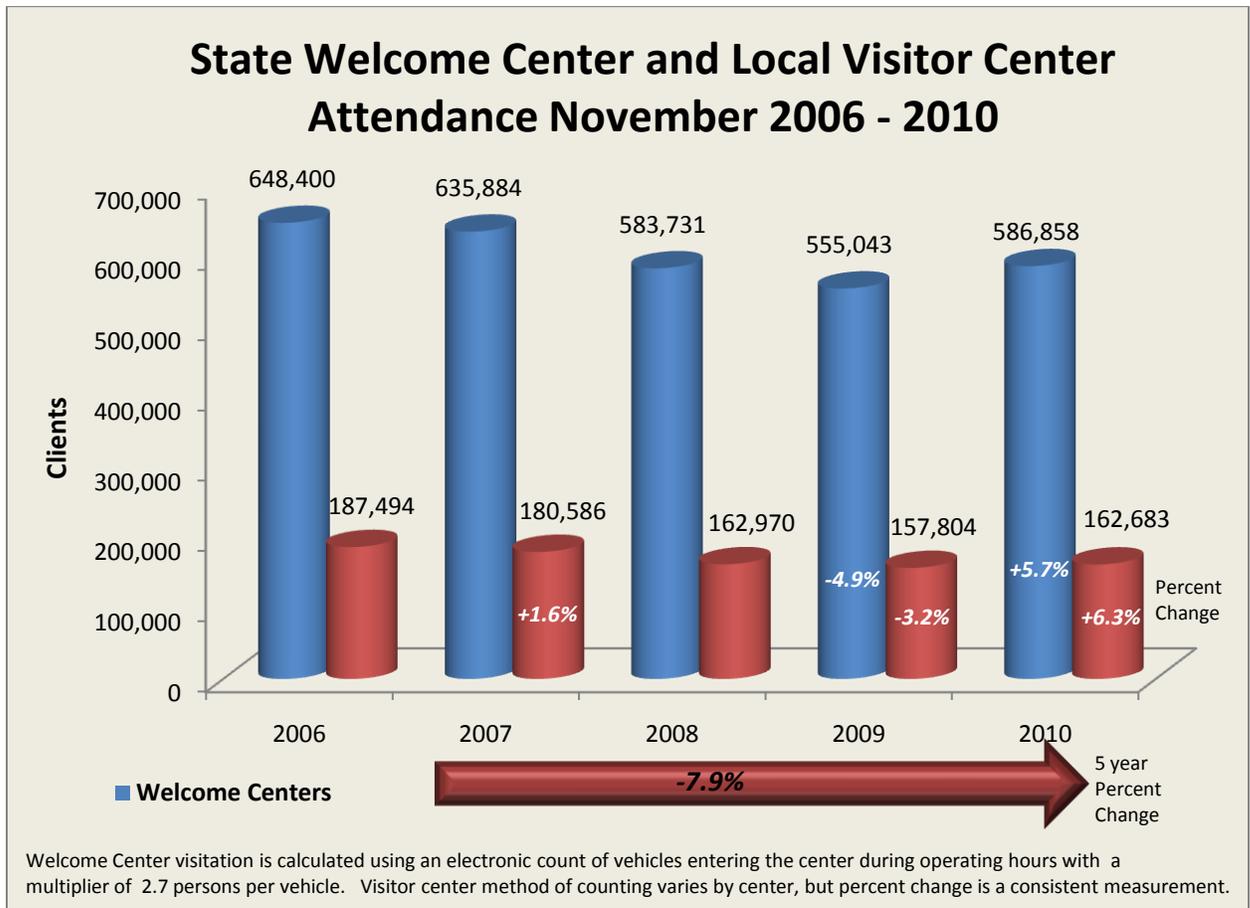


Chart 8 provides November visitation statistics for State Welcome Centers, as well as Local Visitor Centers throughout North Carolina. It should be noted that while there is a percent change indicated for welcome centers for 2007-2008 and 2008-2009, 2008 was the first year a percent change could accurately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

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

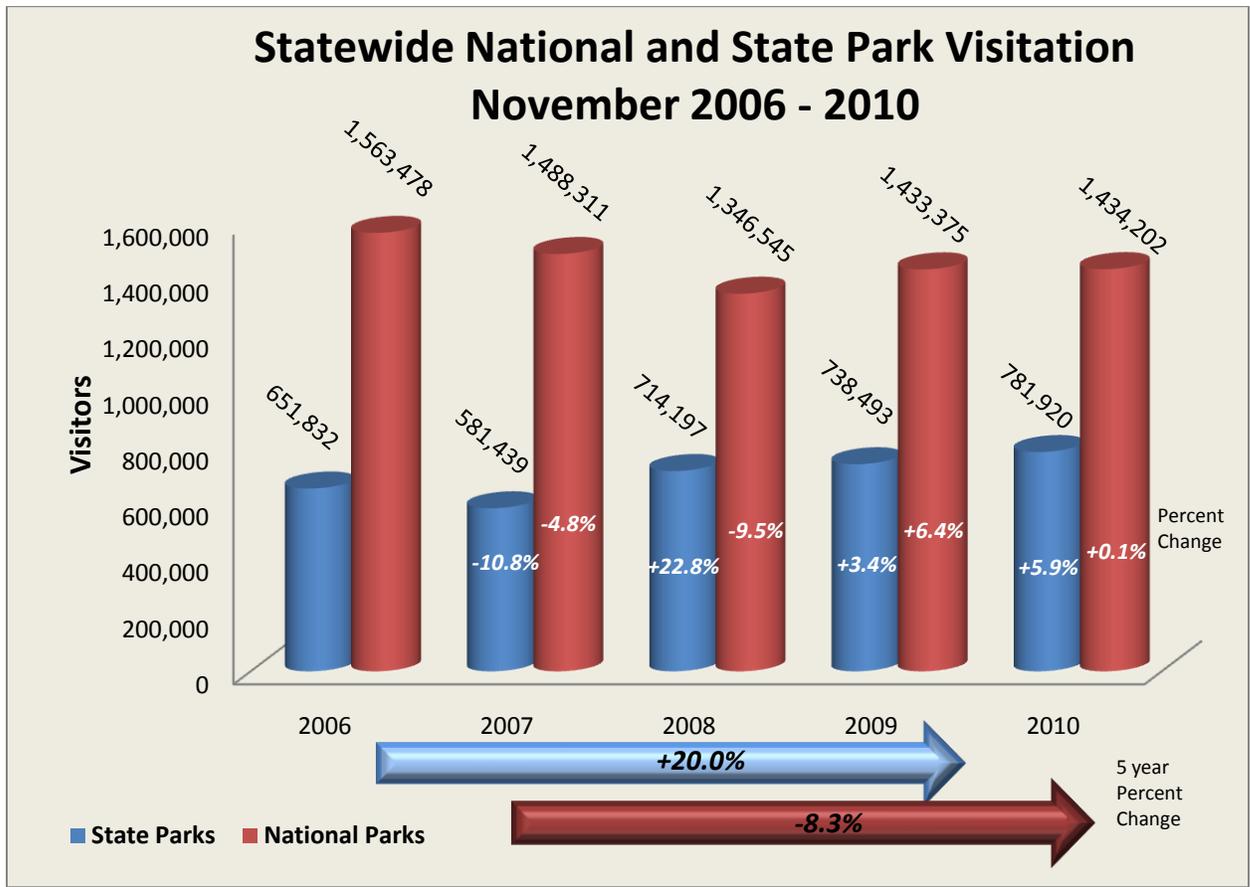
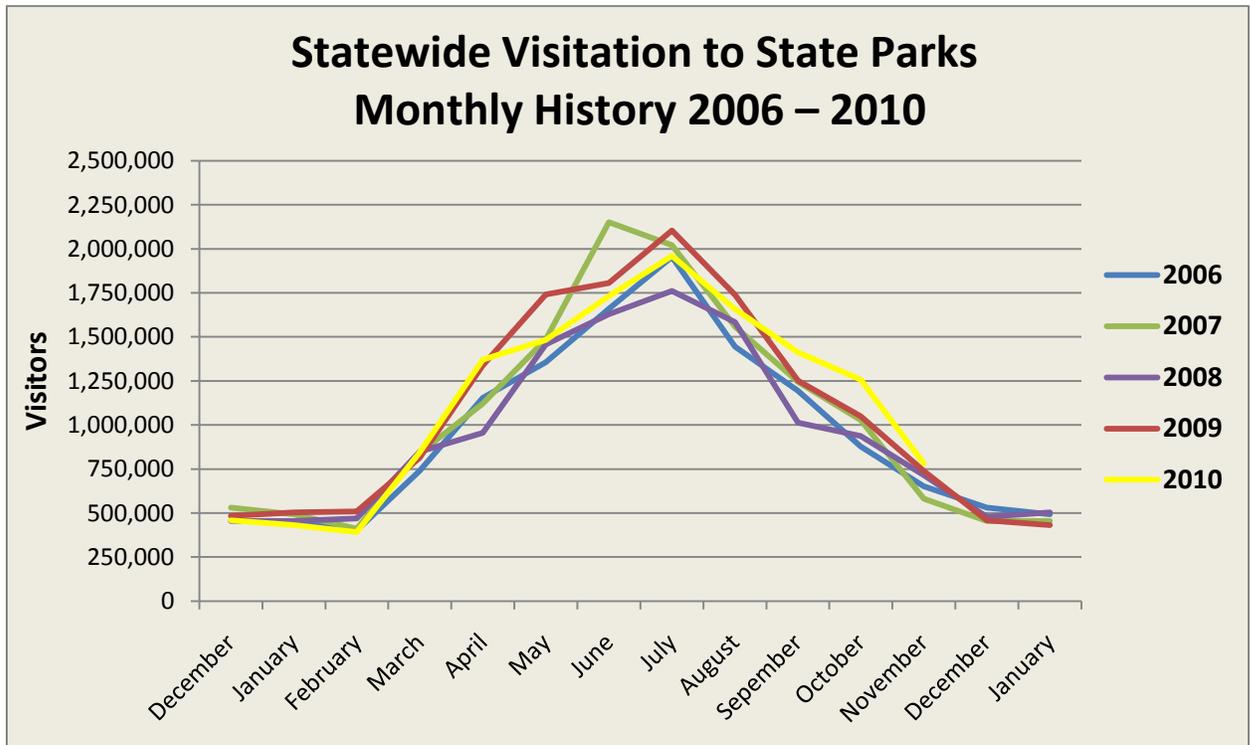


Chart 9 depicts visitation to state and national parks in North Carolina for the last five years months of November. Both state and national parks had increases in November from the previous year, and state parks had the highest visitation in at least the last five years (up over twenty percent from 2006).

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

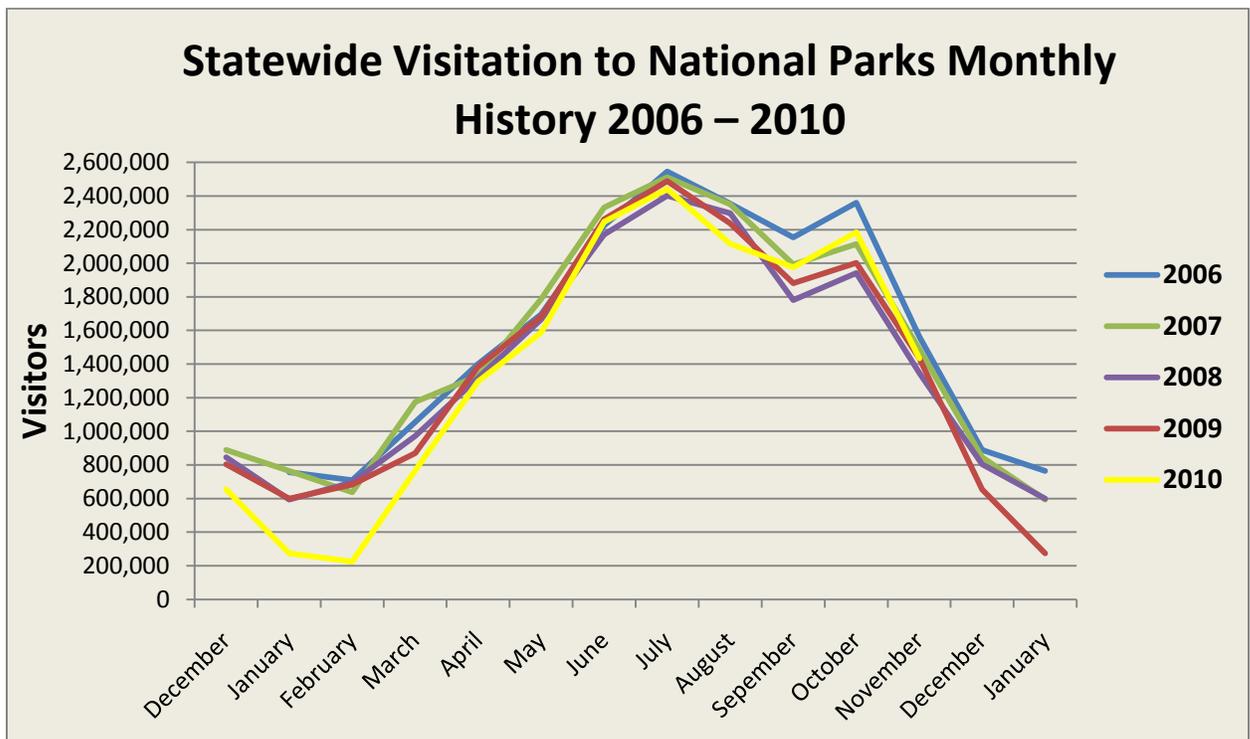


Chart 12 – Statewide Airport Arrivals and Departures - November 2006 – 2010

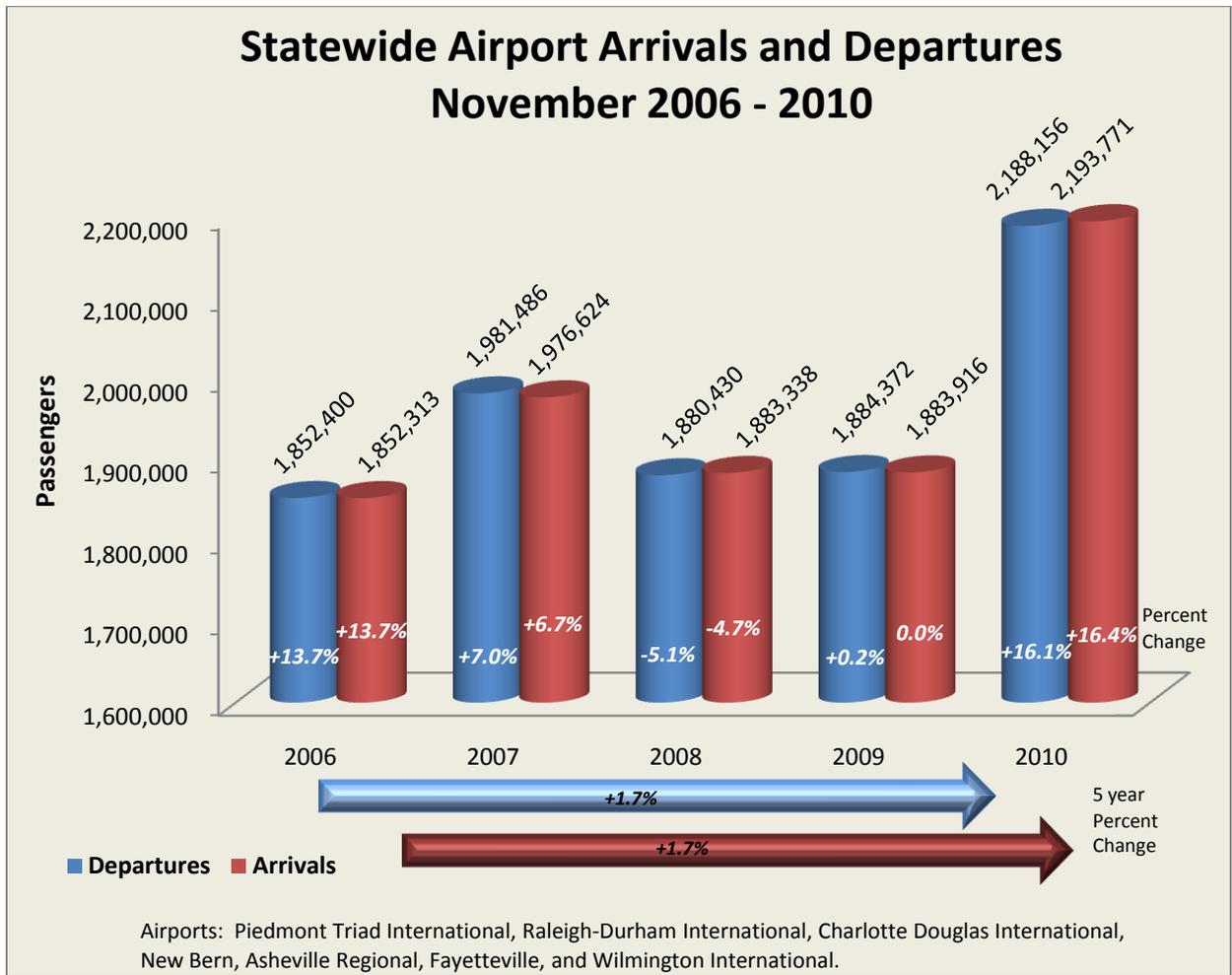


Chart 12 shows November airport arrivals and departures for each of the previous five years. The arrivals and departures substantially increased statewide from last November, and there has been a positive five-year increase in both for the month of November.

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

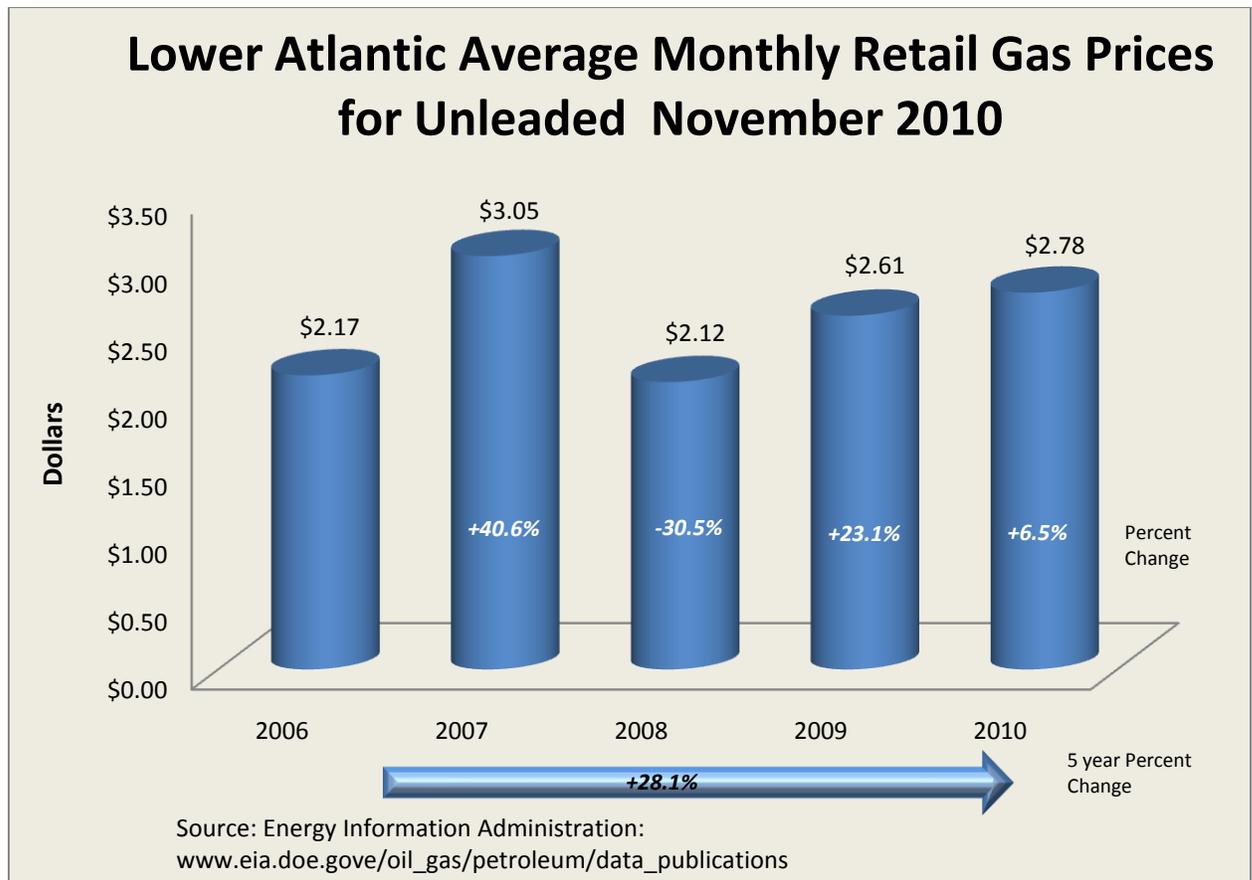


Chart 13 provides the average price per gallon of unleaded gasoline for November 2010 and the same month from the four previous years. The data provided above, when compared with other indicators such as attraction attendance and visitor spending data, can be very helpful in the analysis of general travel trends. Fuel prices in November 2010 were up over six percent from last November, and up 28% from 2006.

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

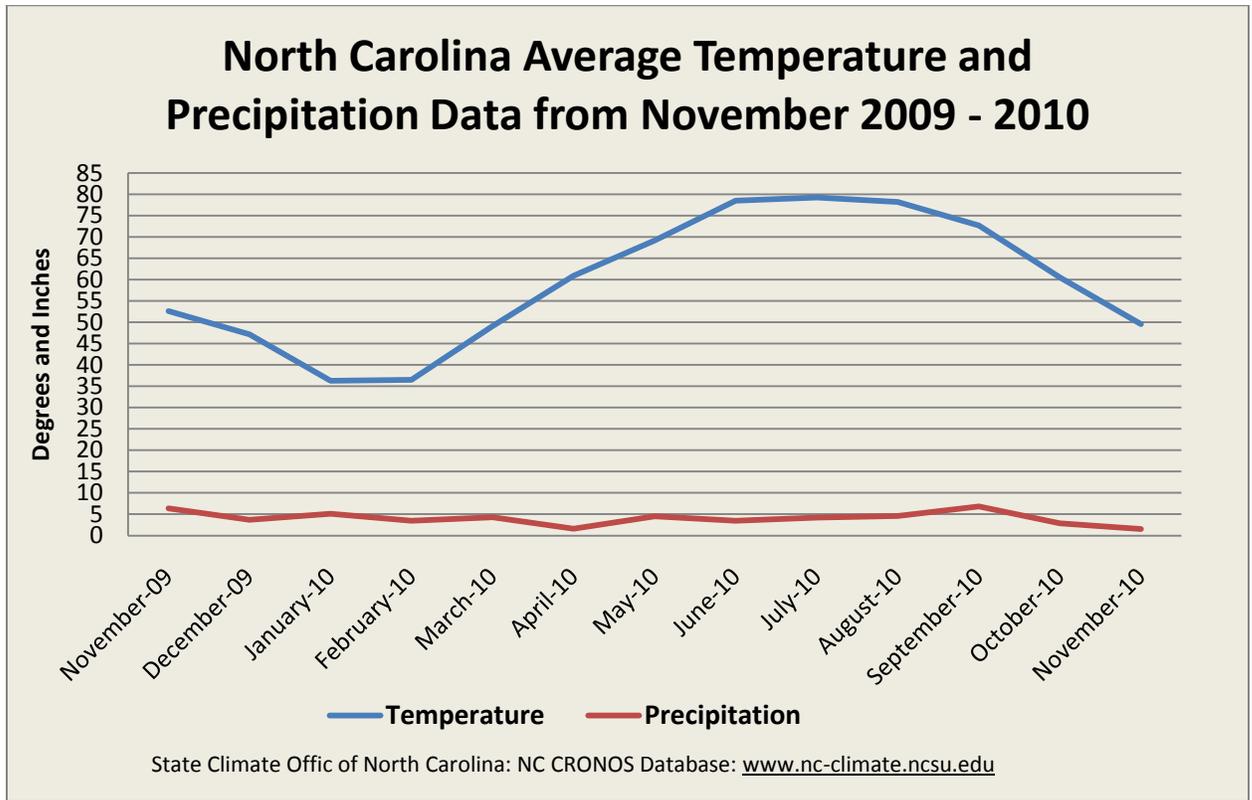


Chart 14 provides 13 months of air temperature and precipitation. This data, when analyzed together with gas price data and other tourism indicators, can be valuable in determining possible reasons for significant increases and/or decreases in indicators. For instance, greater than normal precipitation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

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

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

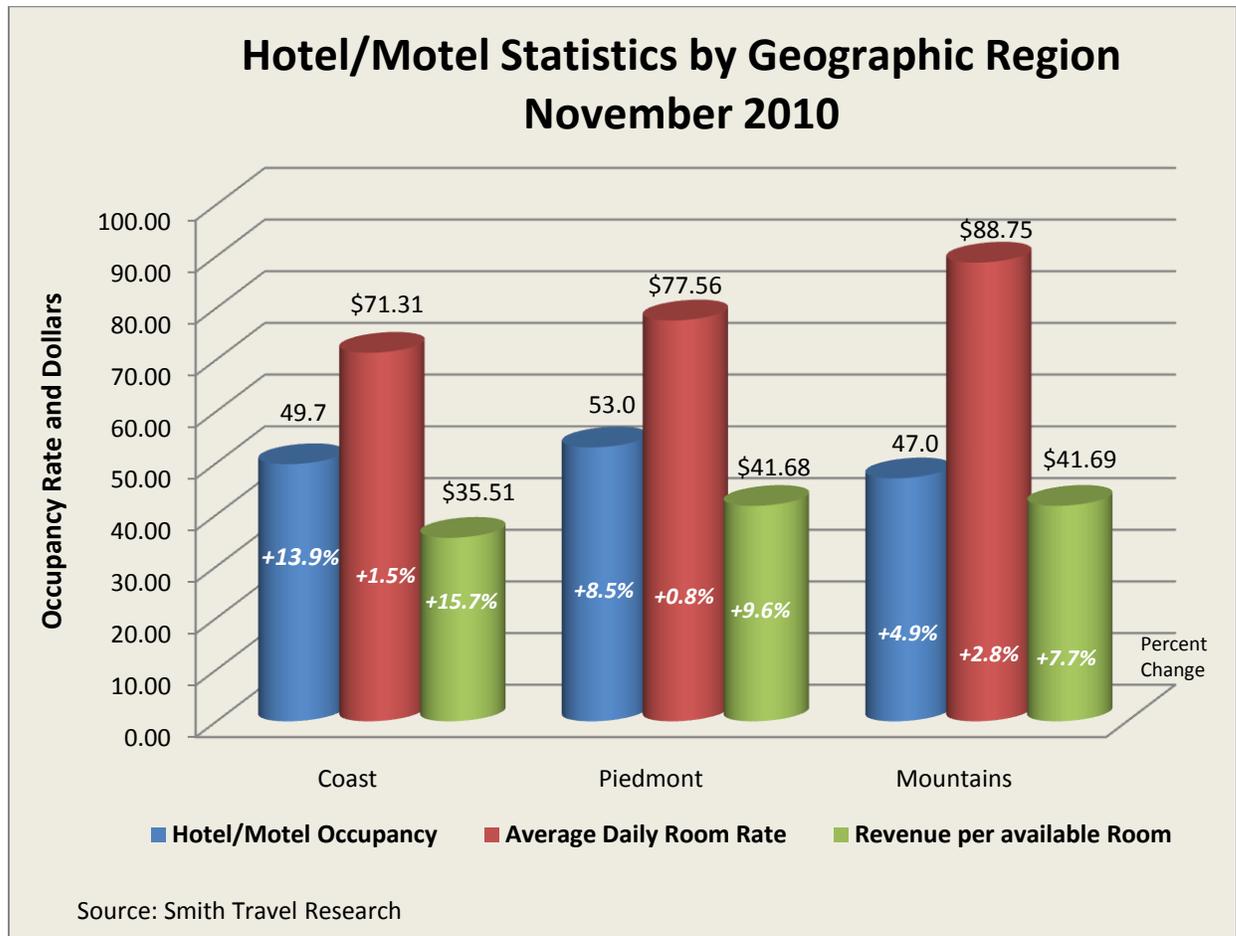


Chart 15 provides a one year comparison in lodging statistics for the three geographic marketing regions of North Carolina in November. All major indicators showed increases in all three regions in November 2010 as compared to 2009.

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

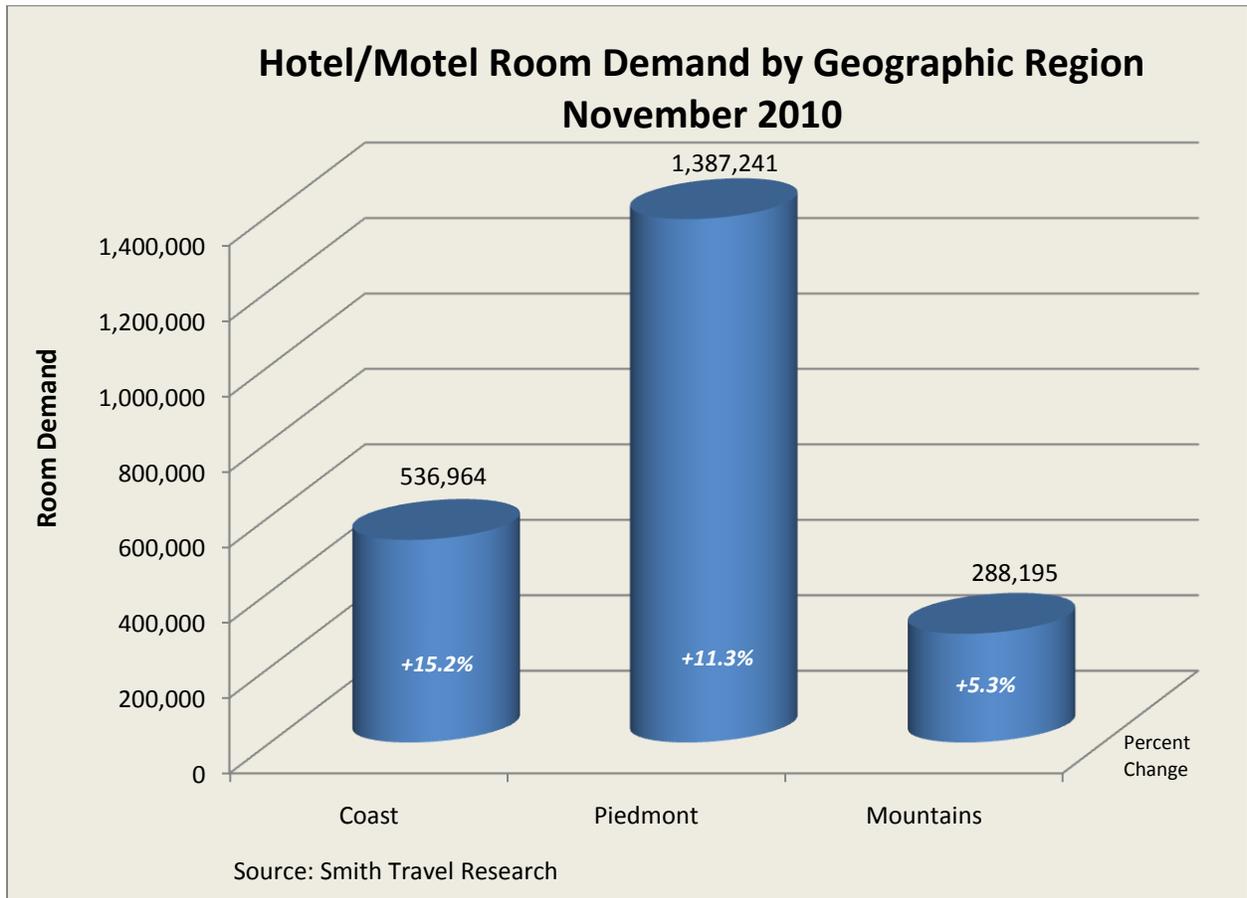


Chart 16 provides hotel/motel demand by geographic region for November 2010. Demand differs from occupancy in that it is the total number of rooms sold, not accounting for differences in room supply. The Coastal and Piedmont regions had demand growth of over ten percent from November 2009 to November 2010, and the Mountain Region had an five percent increase from 2009.

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

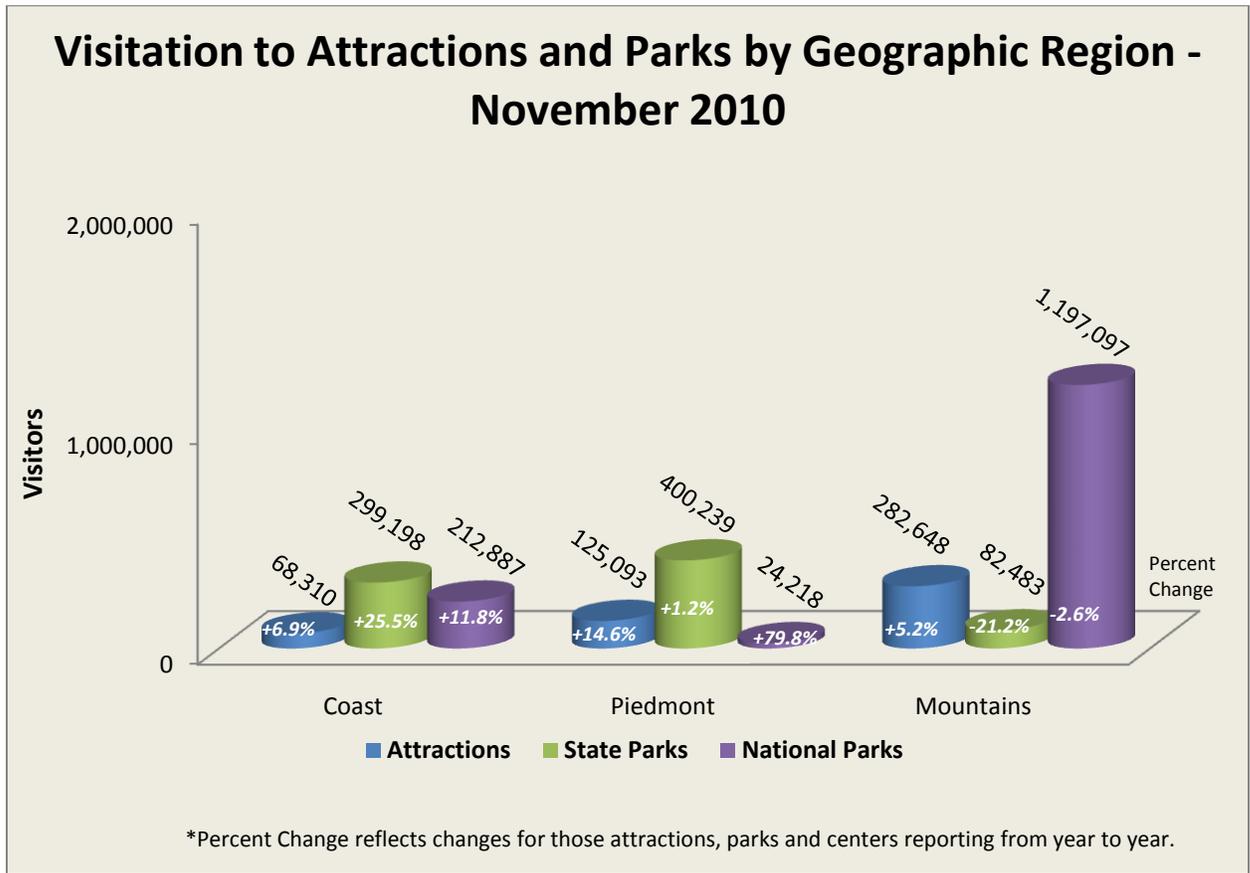


Chart 17 provides a look at the attractions industry in North Carolina in November 2010 by geographic region. As with the statewide numbers, the following data represents only a sample of North Carolina attractions that provide their attendance data, and are not intended to be considered a complete list 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 Guilford Courthouse National Military Park, the only national park in the Piedmont Region, had tremendous growth in November as compared to November 2009. However, due to a substantial decrease in November 2009, the two year percent change from 2008 to 2010 shows an 8 percent growth. Park attendance in the Mountain Region showed decreases from 2009 to 2010, yet attraction attendance was up over five percent.

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

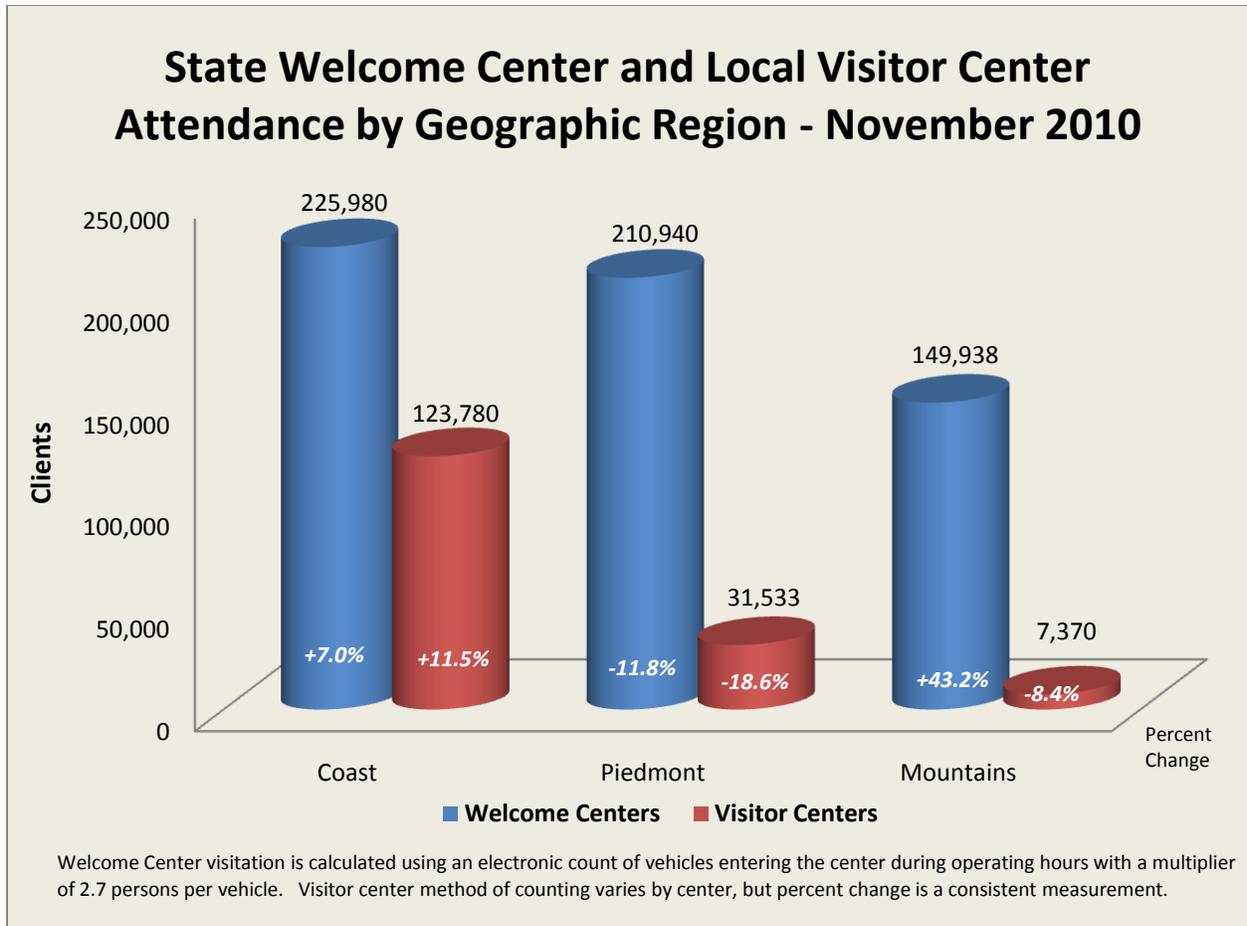


Chart 18 shows welcome center and visitor center attendance by geographic region and offers comparisons from November 2009. The Coastal and Mountain region welcome centers experienced healthy increases from November 2009. However, the centers in the Piedmont Region saw large decreases in visitation.

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

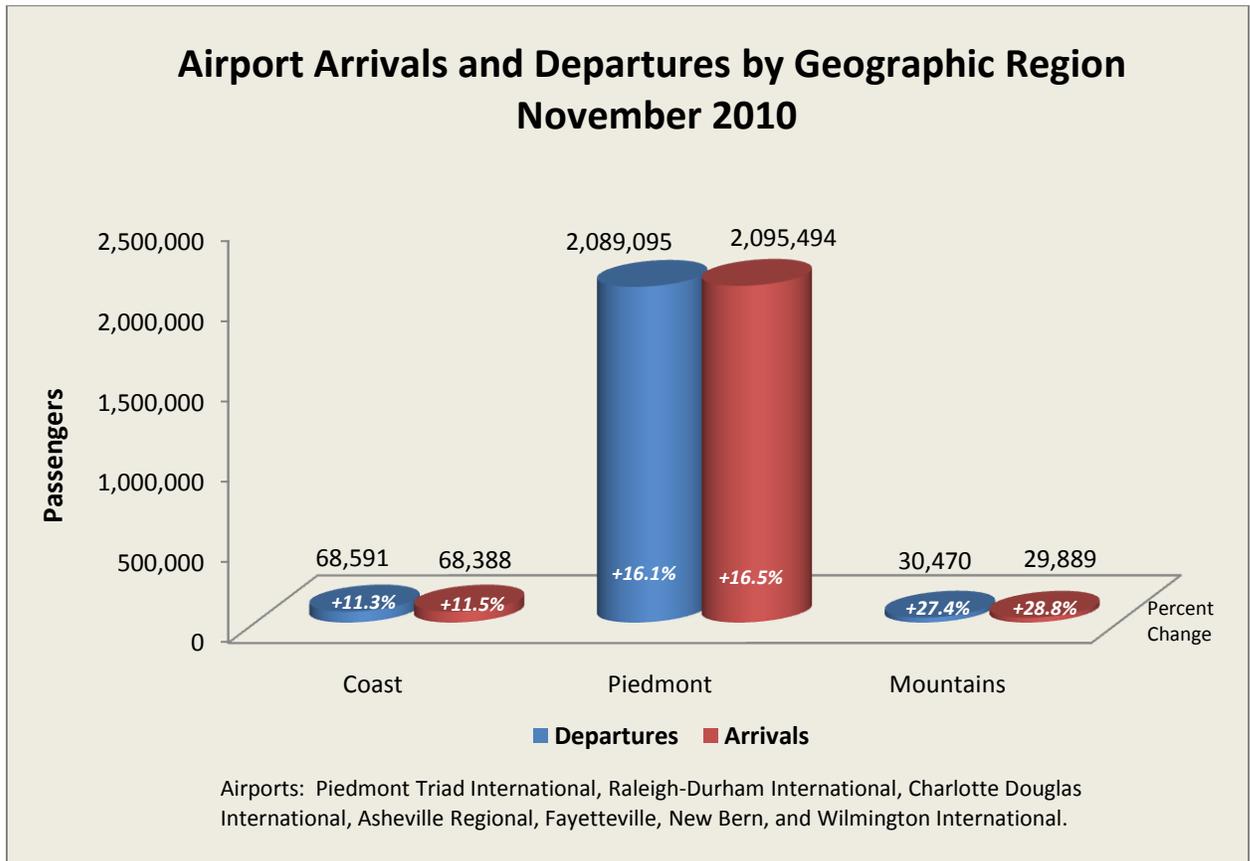


Chart 19 provides a breakdown of air travel statistics by geographic region. While the majority of air traffic is through the Piedmont Region, it is helpful to maintain a trend of other regional airport usage. The Mountain Region showed extremely strong growth of over thirty percent in air traffic during the month of November, while the other regions saw very positive increases from last year as well.

Section 3: Economic Development Region Tourism Indicator Analysis – November 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 - November 2010

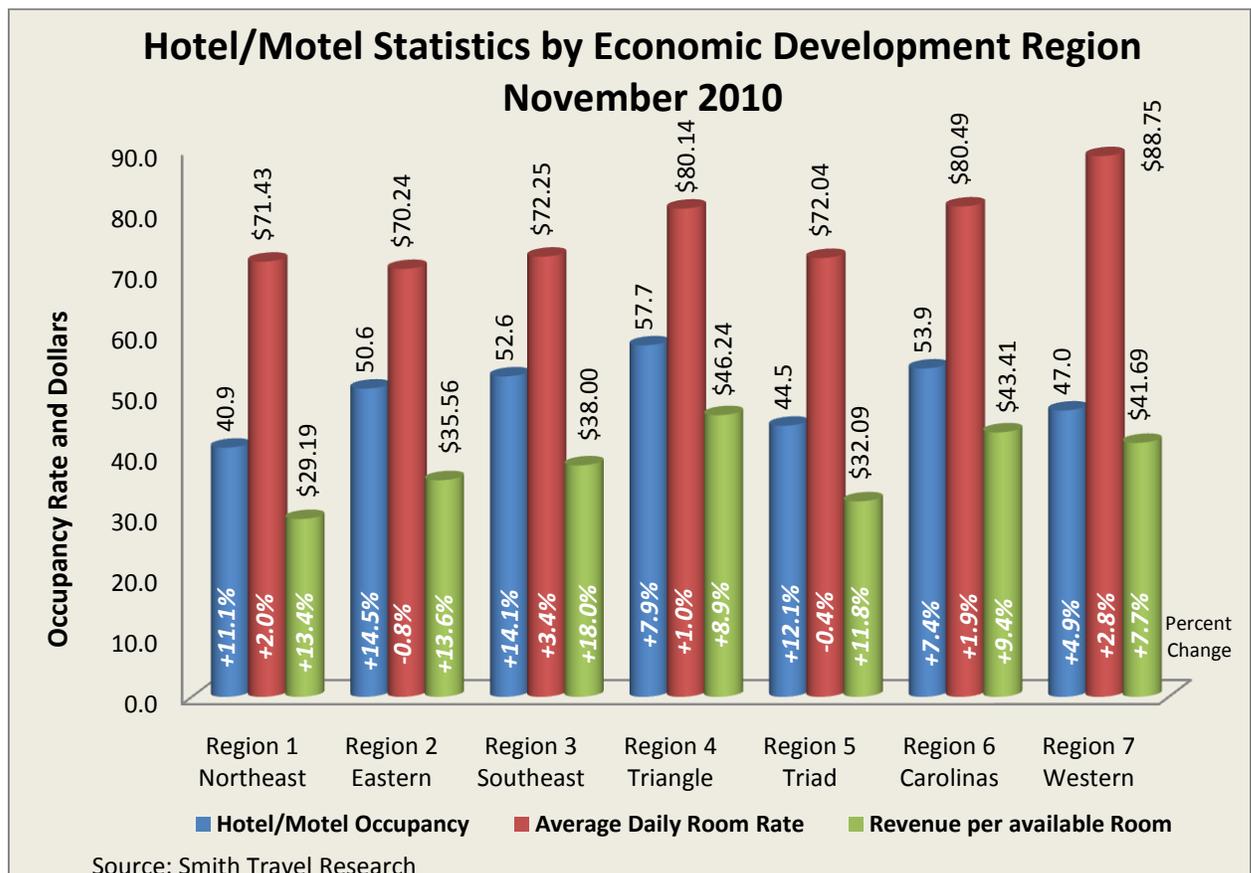


Chart 20 provides lodging indicators for November 2010 by economic development region. Also shown are percent changes from November 2009. This graph allows individual regions within the state to track indicators specific to their general destinations, while still being able to compare their data to the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

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

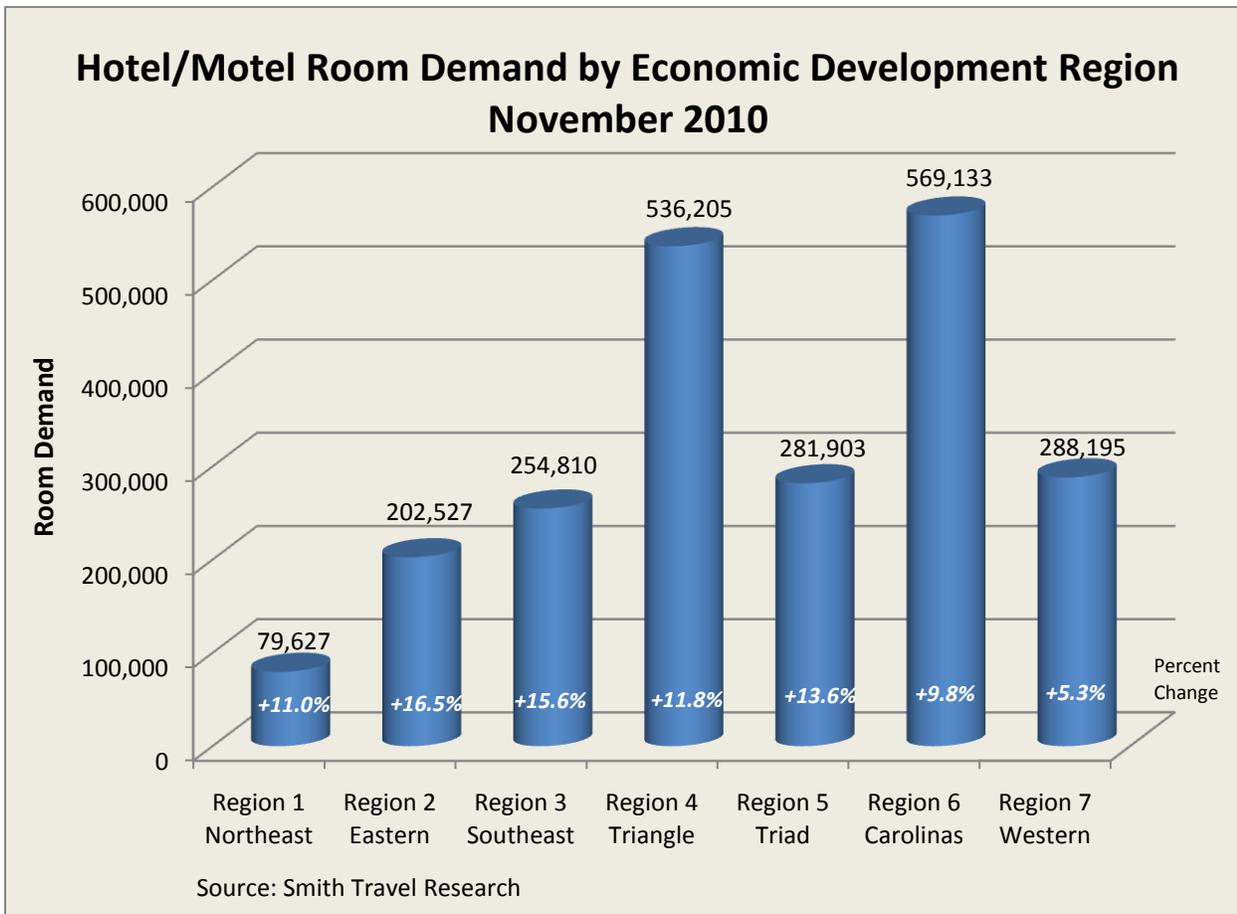


Chart 21 depicts hotel/motel demand for the month of November 2010 by economic development region. Demand is the number of rooms sold excluding complimentary rooms. All regions showed increased demand from November 2009 to 2010. Five regions had increases of over ten percent in demand from November 2009 to November 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 – November 2010

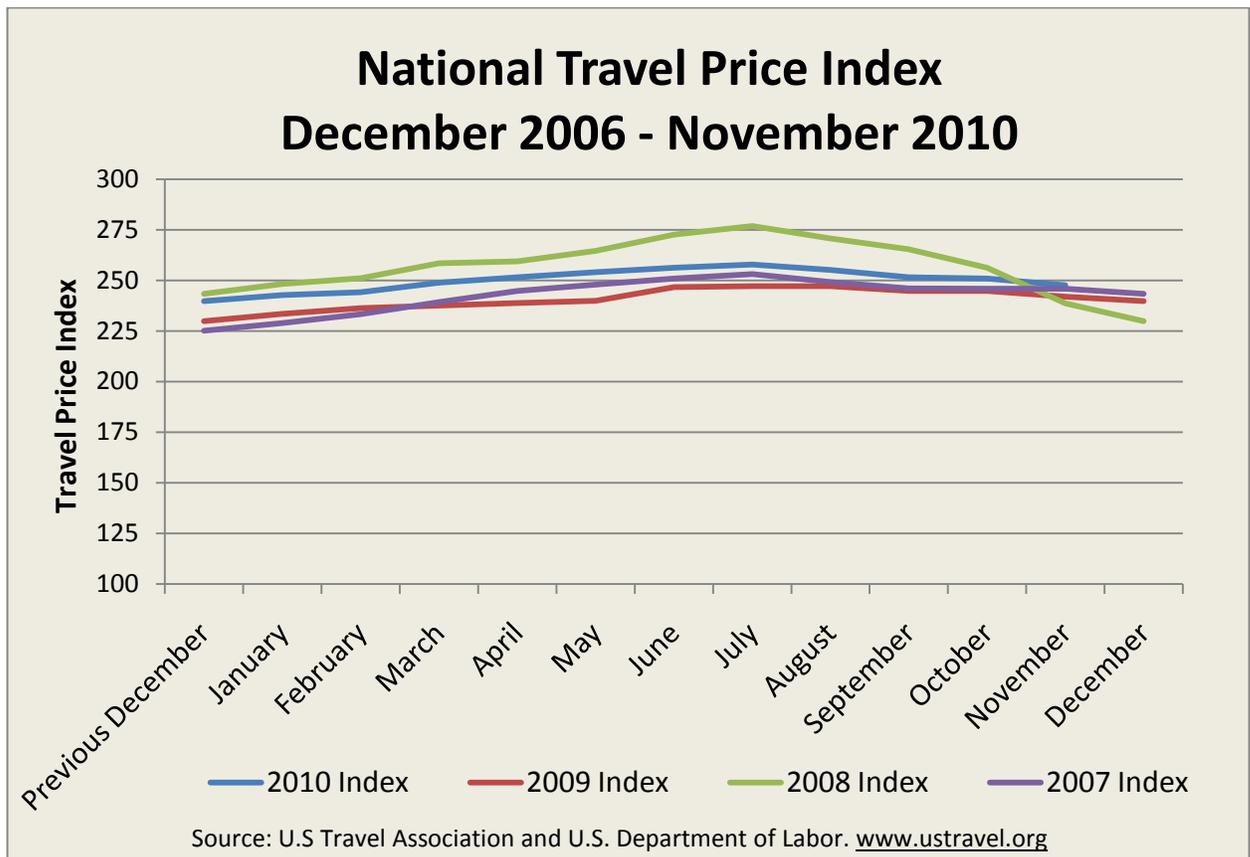


Chart 22 provides a four year trend of the National Travel Price Index (TPI). Steady growth was experienced through mid-2008; however in November 2008, it is clear that as the TPI fell below 2007 levels, the tourism industry began feeling the full effect of the recession. For most of 2009, the TPI remained slightly at or below the 2007 level. In November 2010, the TPI finally inched above the 2008 index for November.