



September 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 September 2013

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

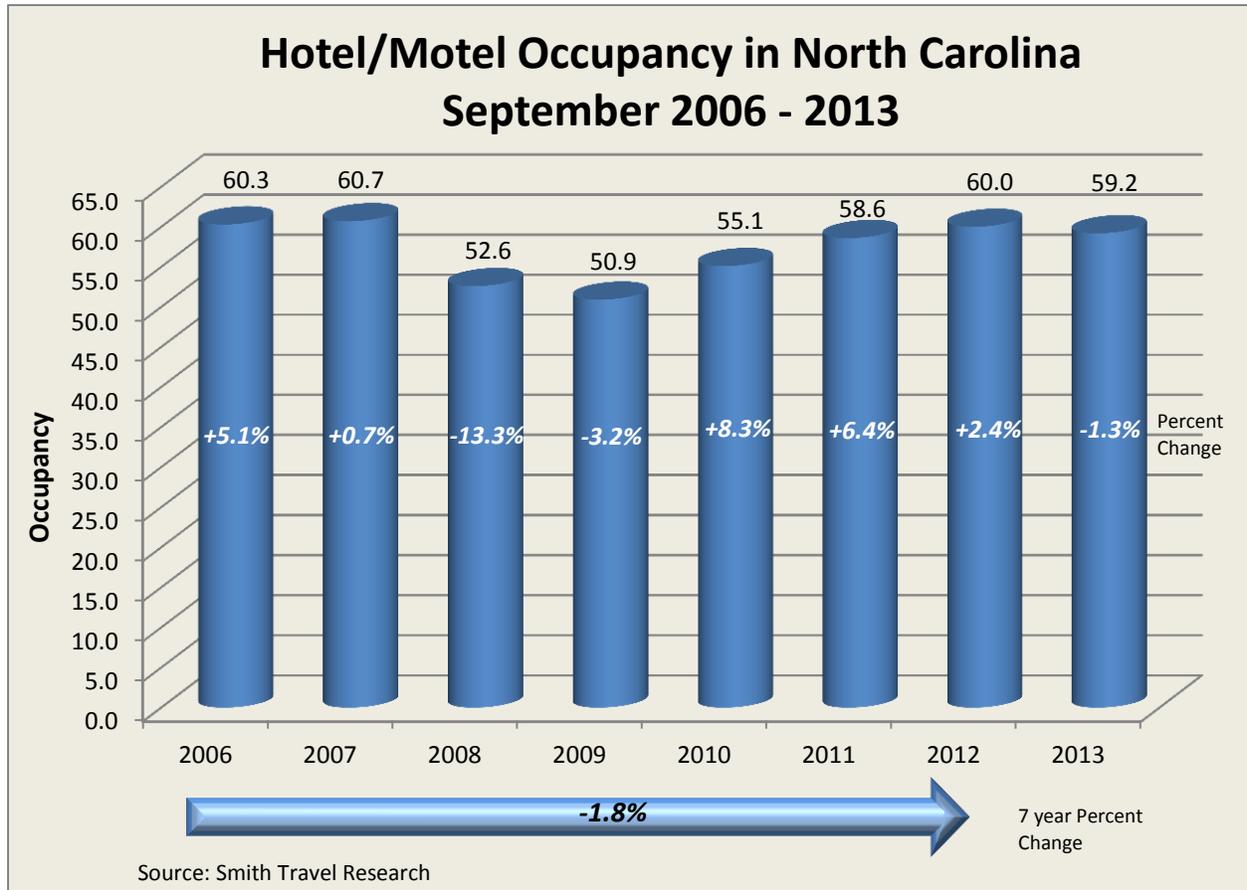


Chart 1 provides a comparison over a seven year period to show the trend of occupancy in the state for the month of September. Occupancy for September 2013 was down one percent from September 2012. *Occupancy at the national level was flat in September 2013 from the previous year.*

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

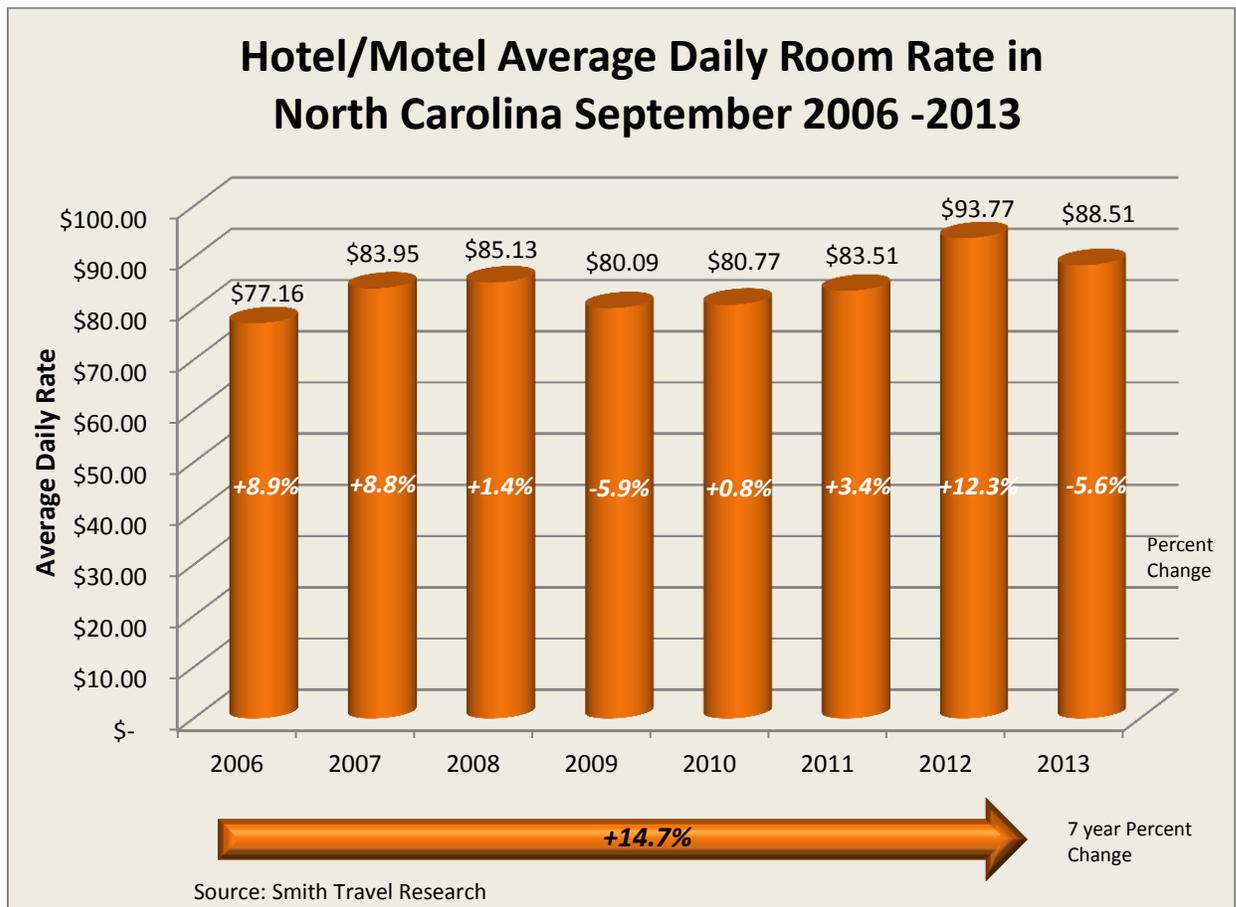
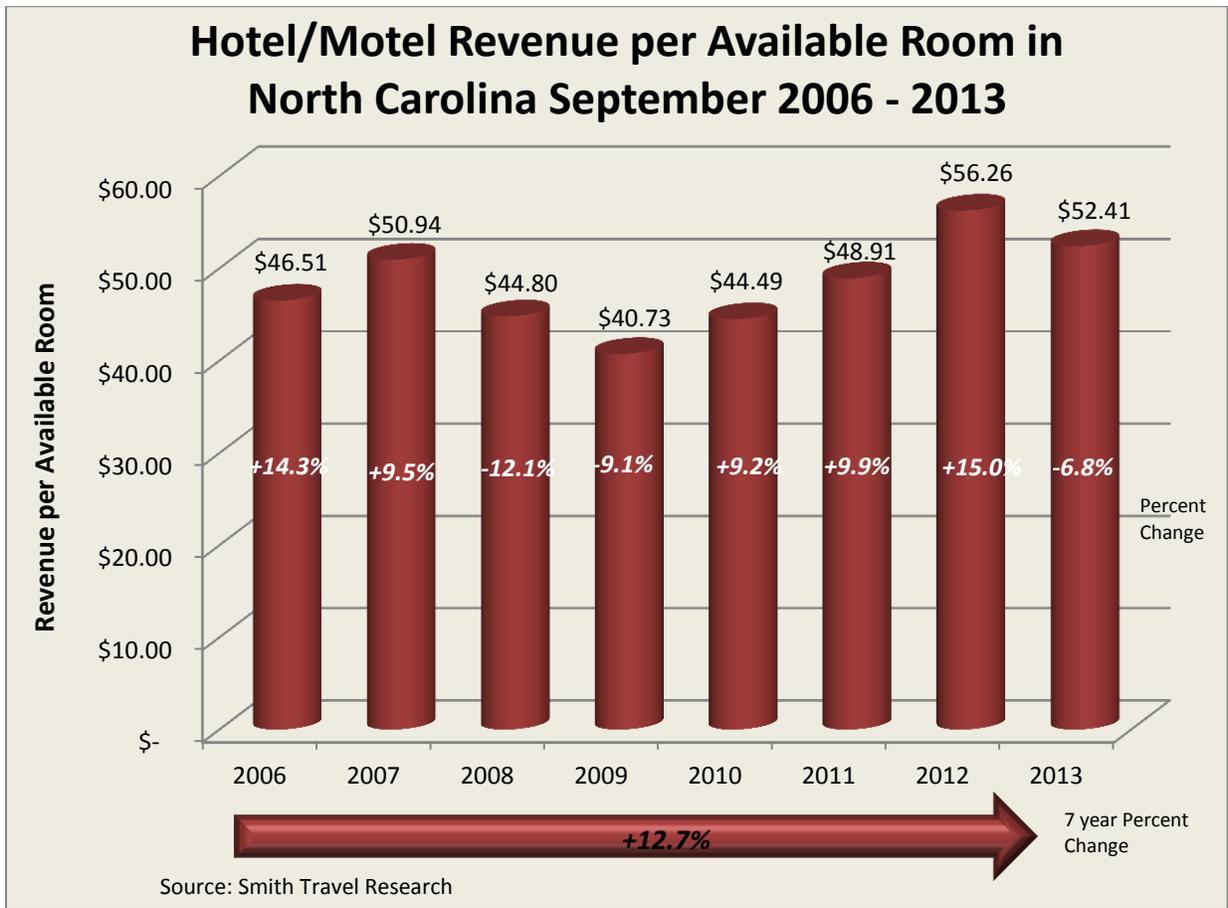


Chart 2 provides a comparison over a seven year period to show the trend of average daily room rate (ADR) in the state for the month of September. ADR decreased more than five percent in September, but is up over fourteen percent over the last seven years.

It should be noted that the DNC drastically increased ADR in September 2012, thus the decrease is misleading. ADR was up six percent from 2011. After the 2012 ADR, the ADR of \$88.51 was the second highest on record for a September in North Carolina. *ADR at the national level was up 3.3% in September 2013 from the previous September.*

Chart 3 – Hotel/Motel Revenue per Available Room in North Carolina - September 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).

Similar to indicators shown in previous charts, Chart 3 shows a comparison over a seven year period to show the trend of RevPAR in the state for the month of September. RevPAR was down seven percent in September 2013; however at \$52.41 was still the second highest RevPAR on record for the month of September in the state. As with ADR, the DNC in 2012 had a misleading effect on RevPAR. *RevPAR at the national level was up 3.6% in September 2013 from the previous September.*

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



Chart 4 depicts hotel/motel demand for the month of September 2013 with comparisons to the previous seven years. Demand is the number of rooms sold excluding complimentary rooms. Room demand for September was flat from 2012. Room demand at the national level saw an increase of 0.9% change in September 2013 from the previous September.

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

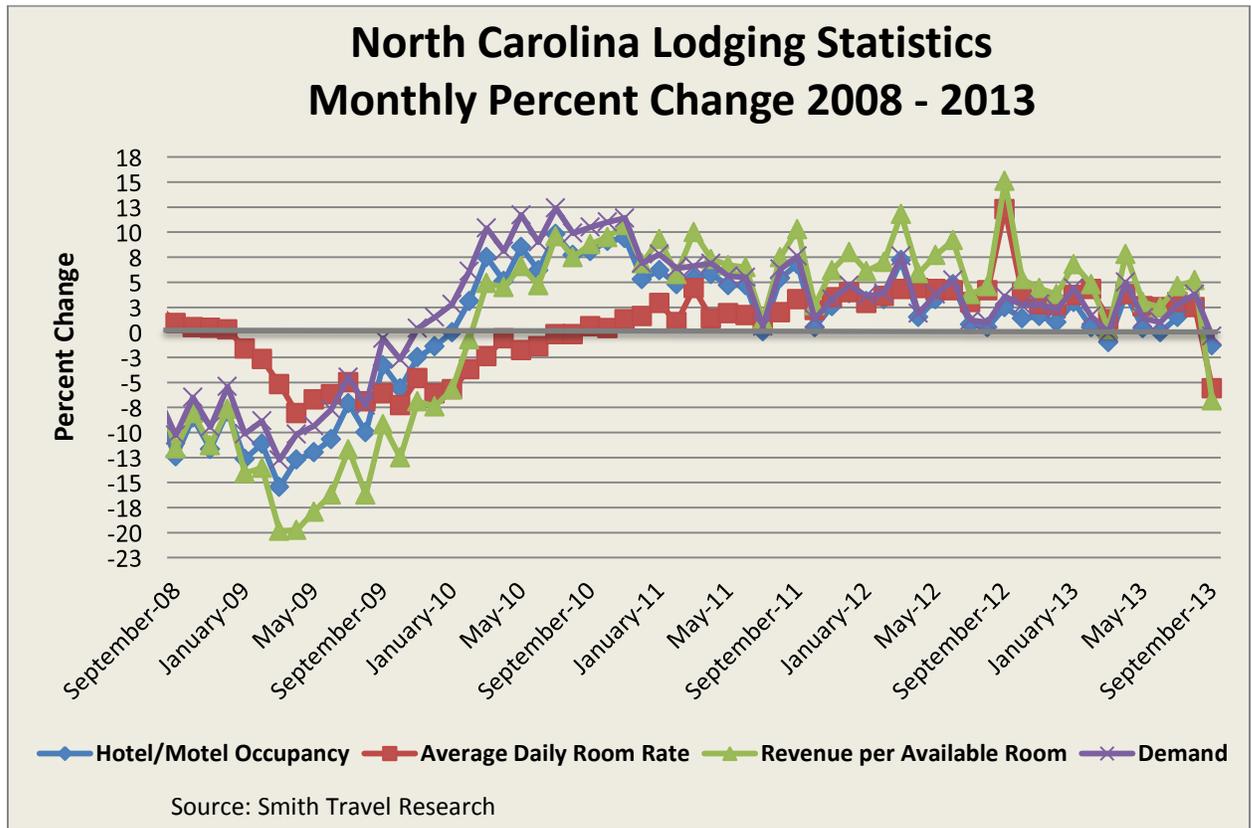


Chart 5 provides a monthly percent change for the four major lodging indicators. The chart allows for a five year trend-line analysis that clearly depicts that the major indicators have shown a steady positive change since early 2010. The September data shows decreases in ADR and RevPAR as indicated previously due to the DNC convention in 2012.

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

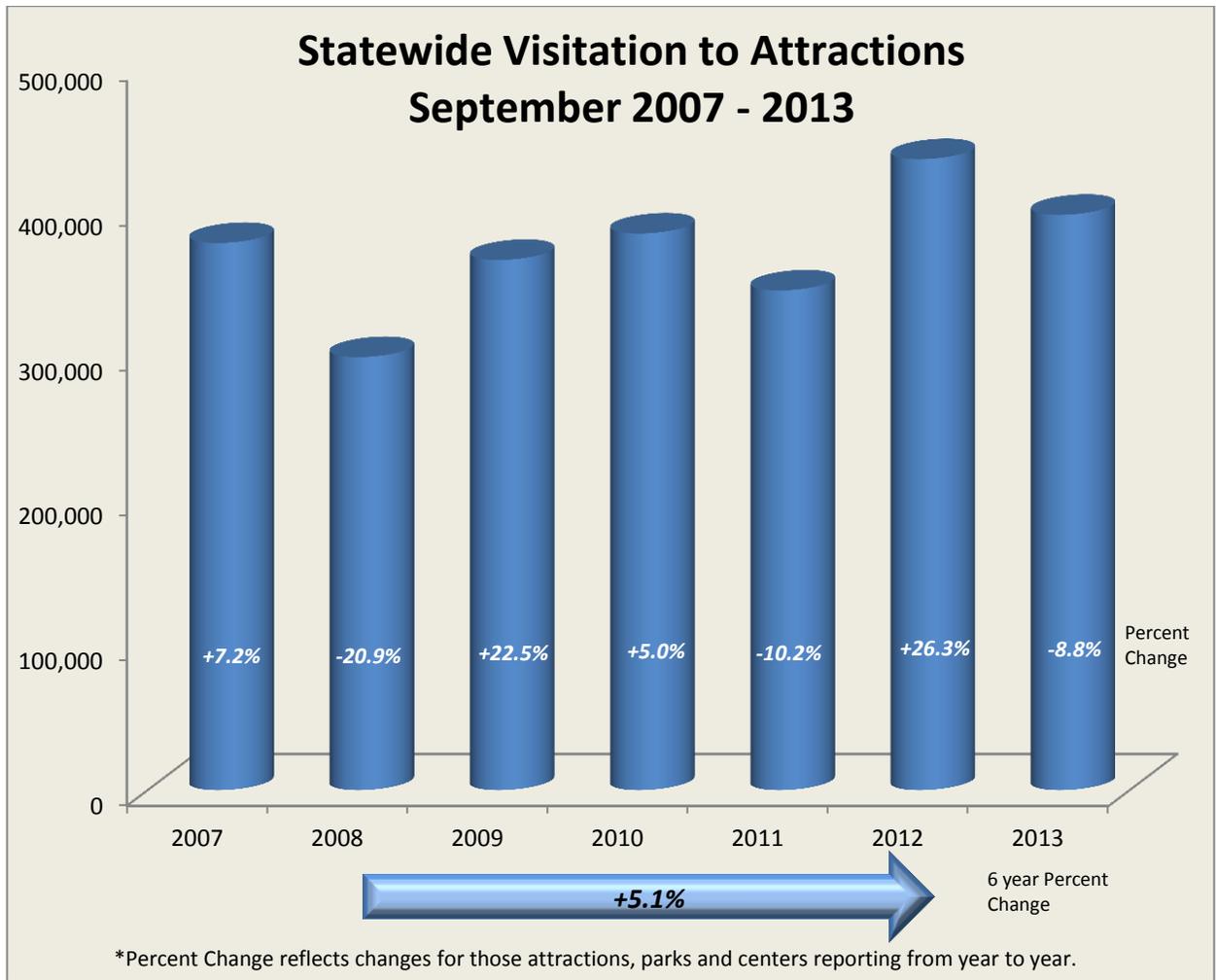


Chart 6 provides a status of the attractions industry in North Carolina for the month of September for the last seven years. The graph represents only a sample of North Carolina attractions that provide their attendance data, and is not intended to be considered a complete list of attractions. However, 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.

September attraction attendance was down nearly nine percent from 2012; however attendance for the month has increased five percent since 2007.

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

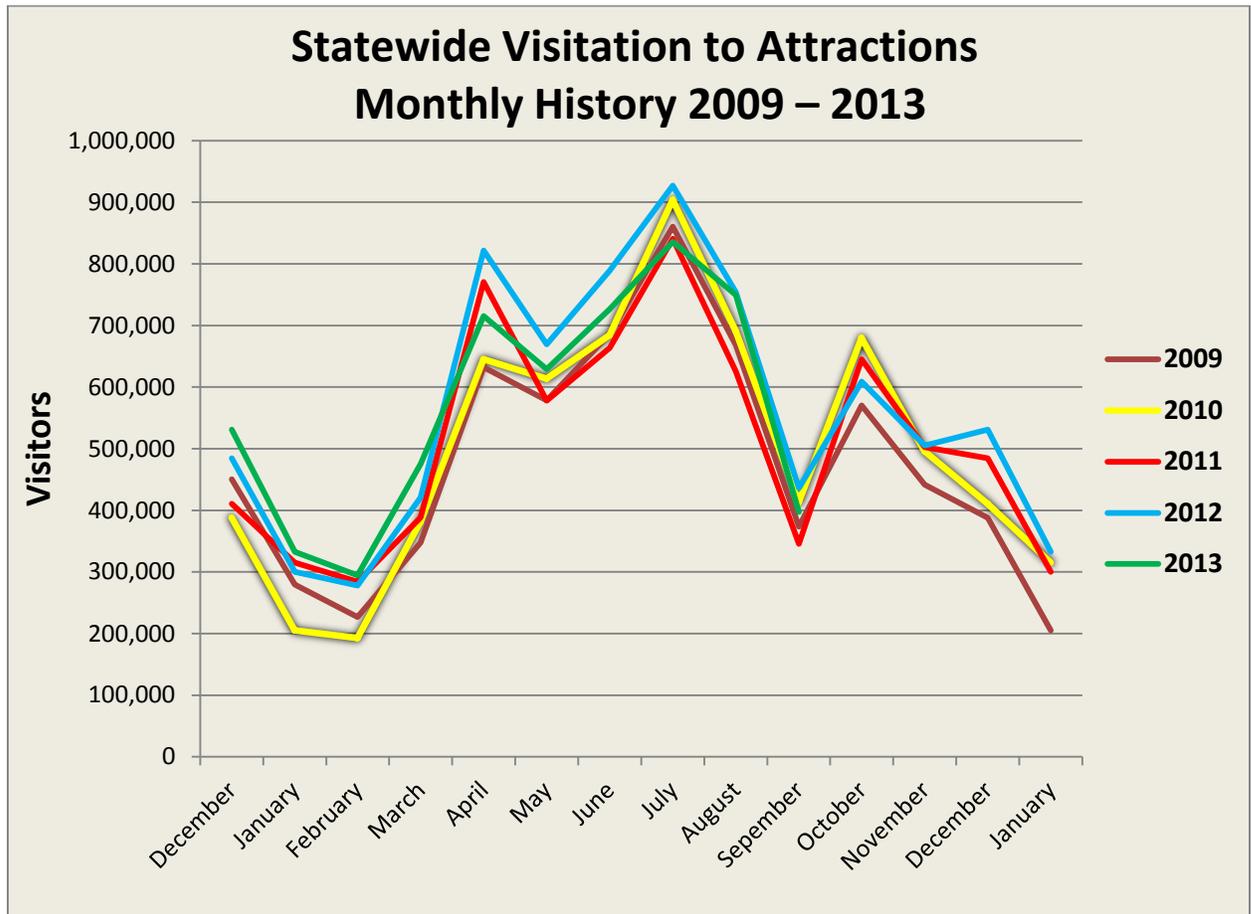


Chart 7 shows a monthly trend of attraction visitation for each of the last five years. This chart allows for a view of the ebb and flow of monthly attraction attendance, while also providing a look at how attendance compares to the same month of the previous years. Not surprisingly, the winter months 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 - September 2008 – 2013

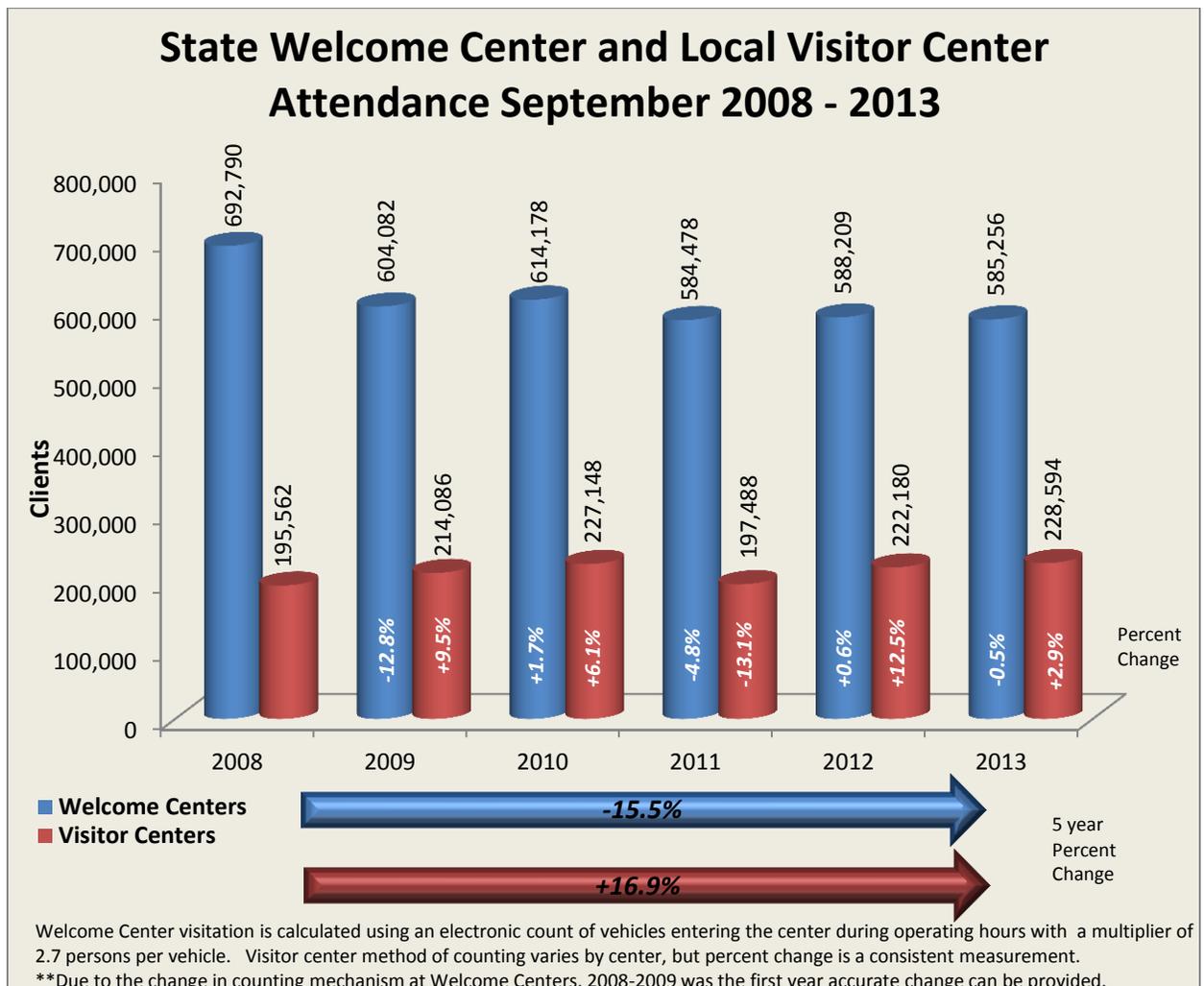


Chart 8 provides September visitation statistics for State Welcome Centers, as well as Local Visitor Centers throughout North Carolina. It should be noted that while there is a percent change indicated for welcome centers for 2007-2008 and 2008-2009, 2008 was the first year a percent change could accurately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

September welcome center was flat statewide from last year, and local visitor center visitation was up nearly three percent from last September.

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

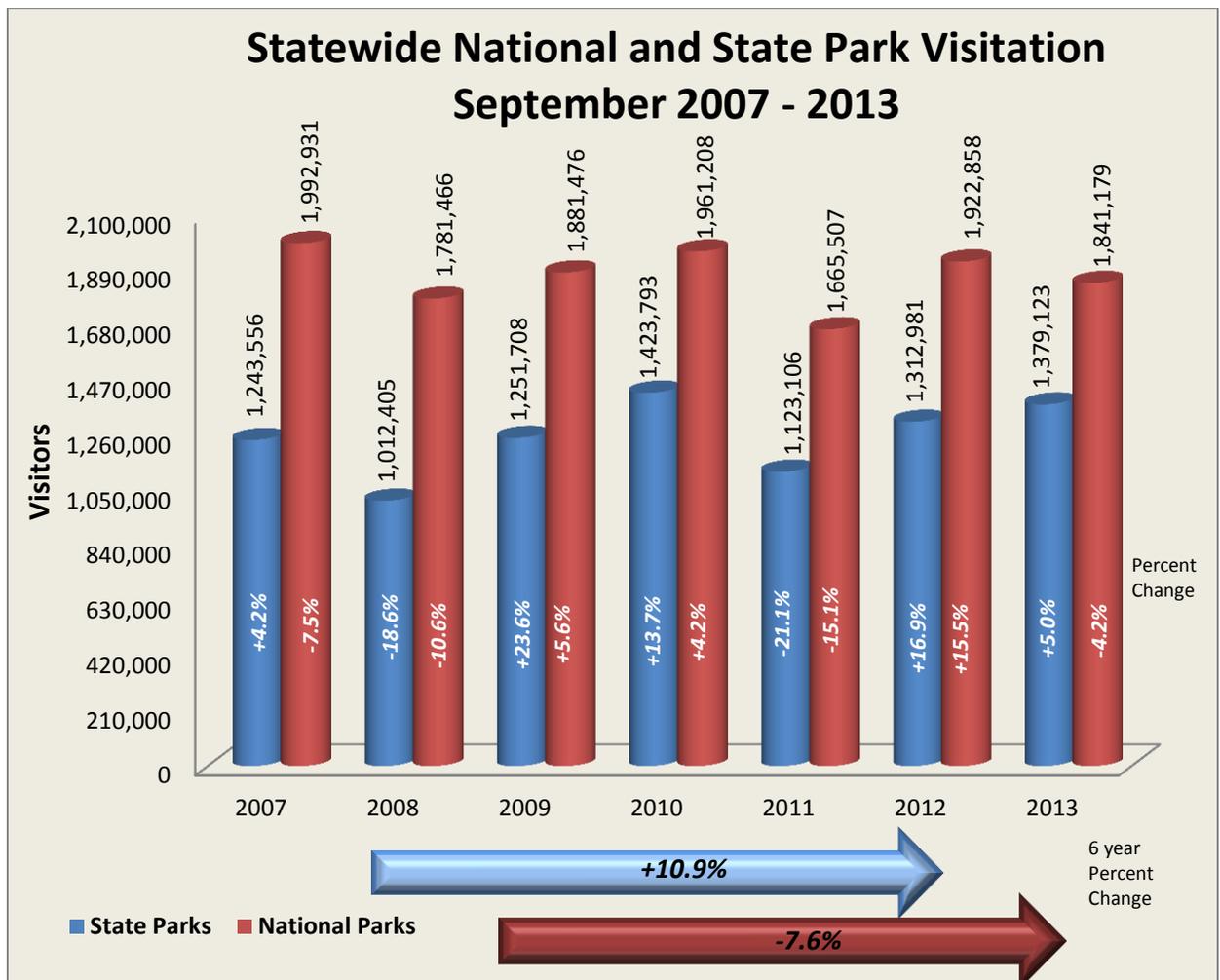
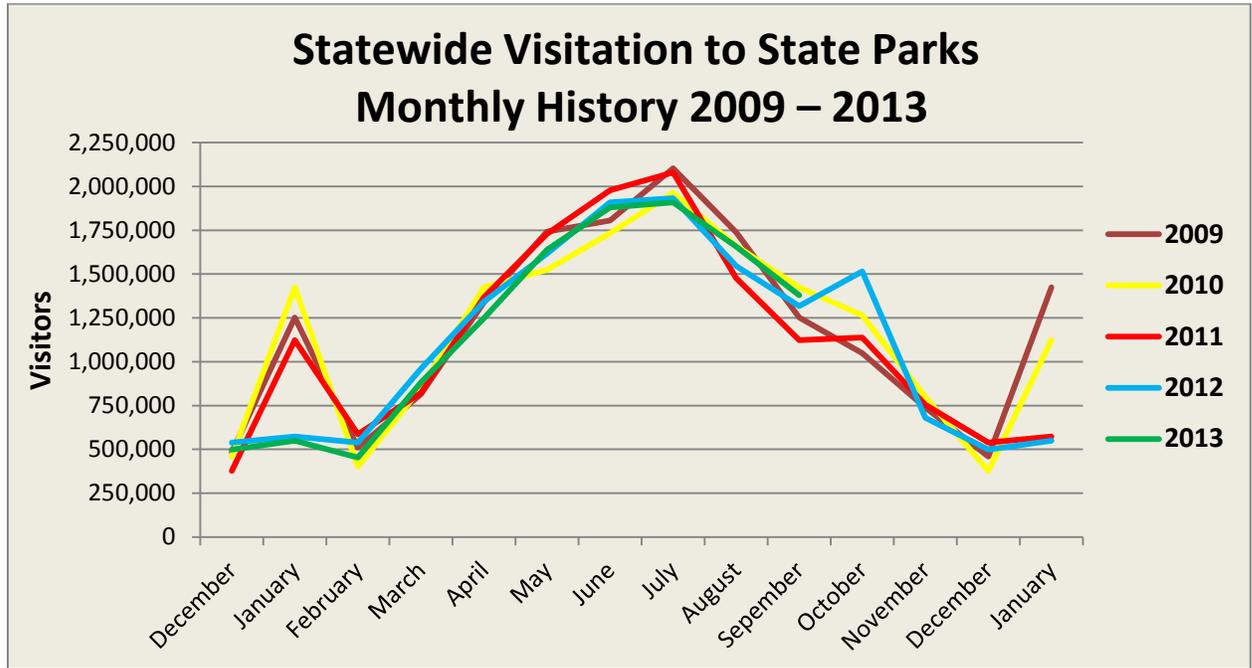


Chart 9 depicts visitation to state and national parks in North Carolina for the last seven years months of September. State park visitation was up five percent in September from 2012. However, national park visitation was down four percent from 2012.

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

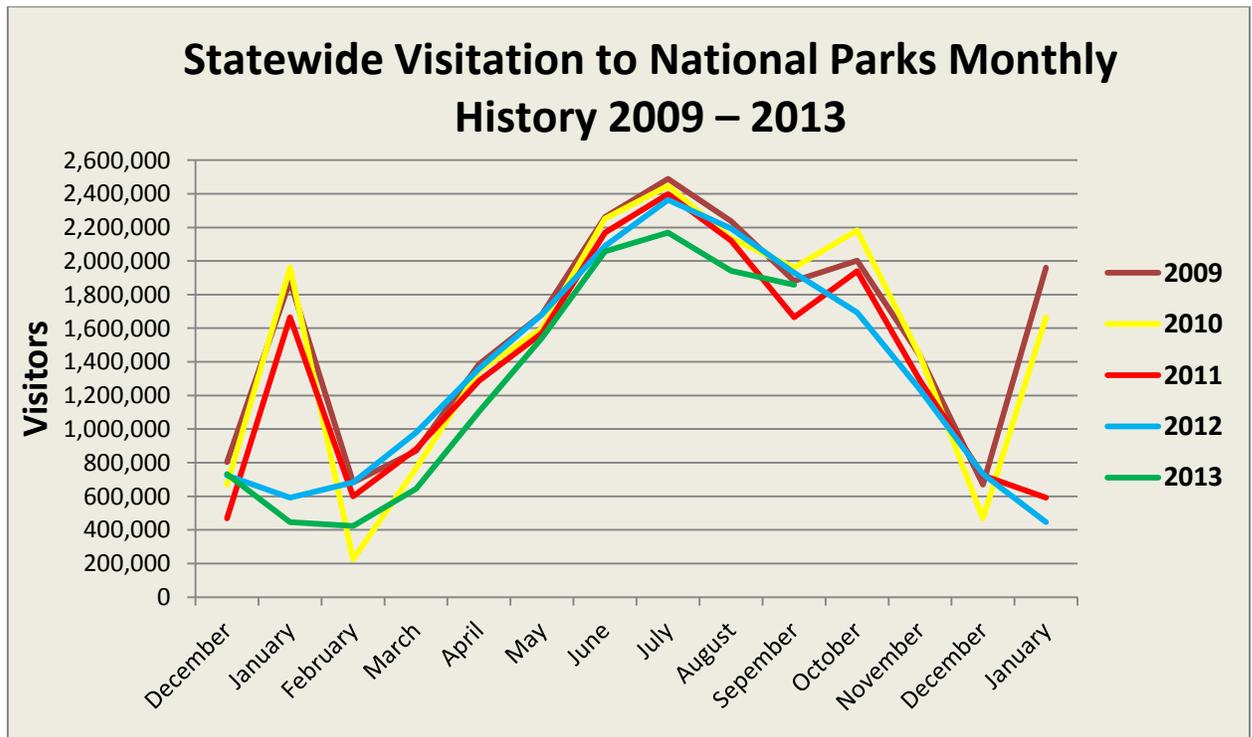


Chart 12 – Statewide Historic Sites Visitation - September 2009 – 2013

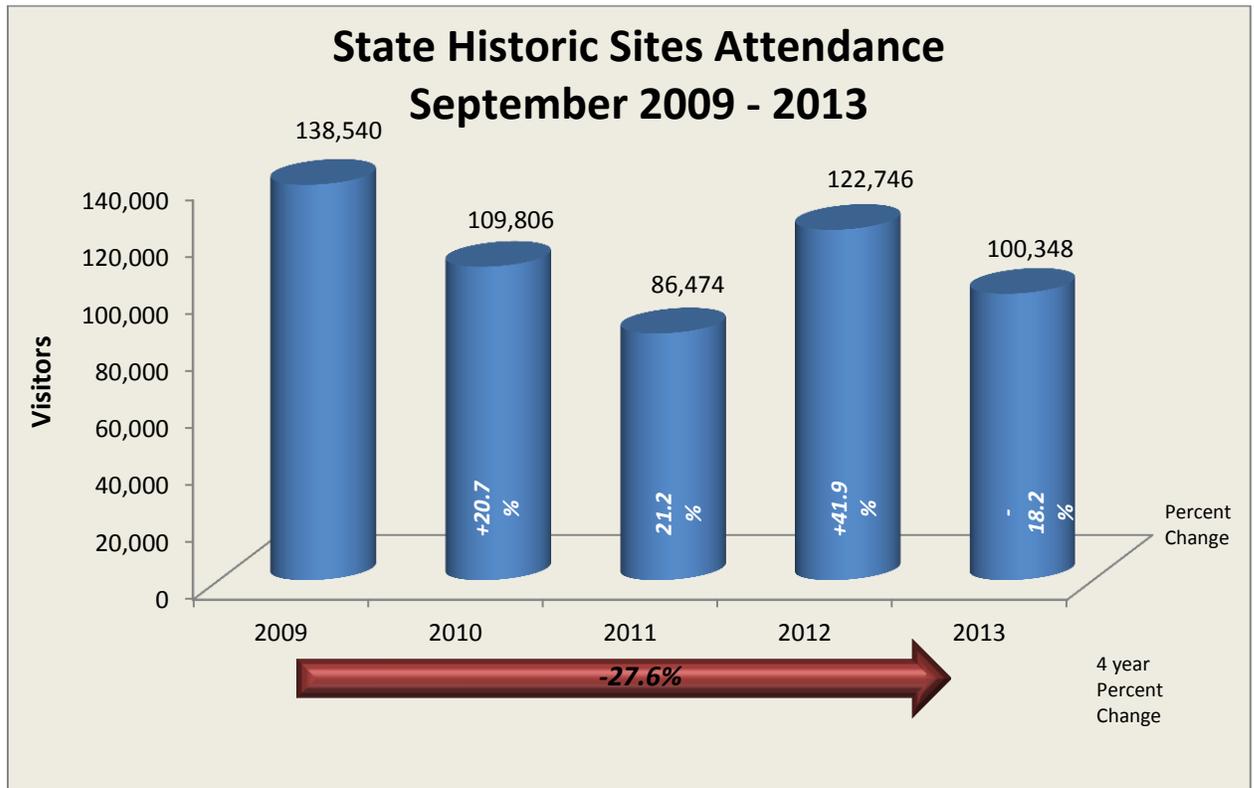


Chart 12 depicts visitation to State Historic Sites in North Carolina for the last five years of September. As this report has just begun tracking historic site visitation, more data is needed to determine the trend.

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

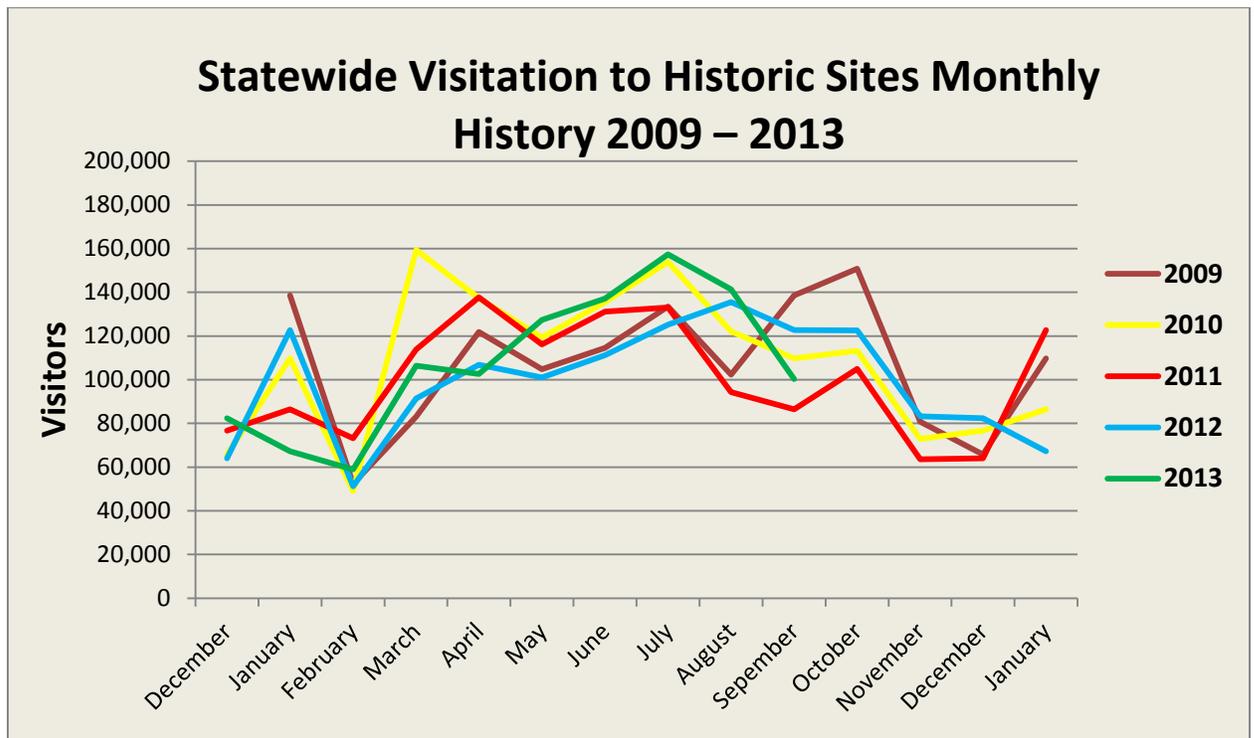


Chart 14 – Statewide Airport Arrivals and Departures – September 2007 – 2013

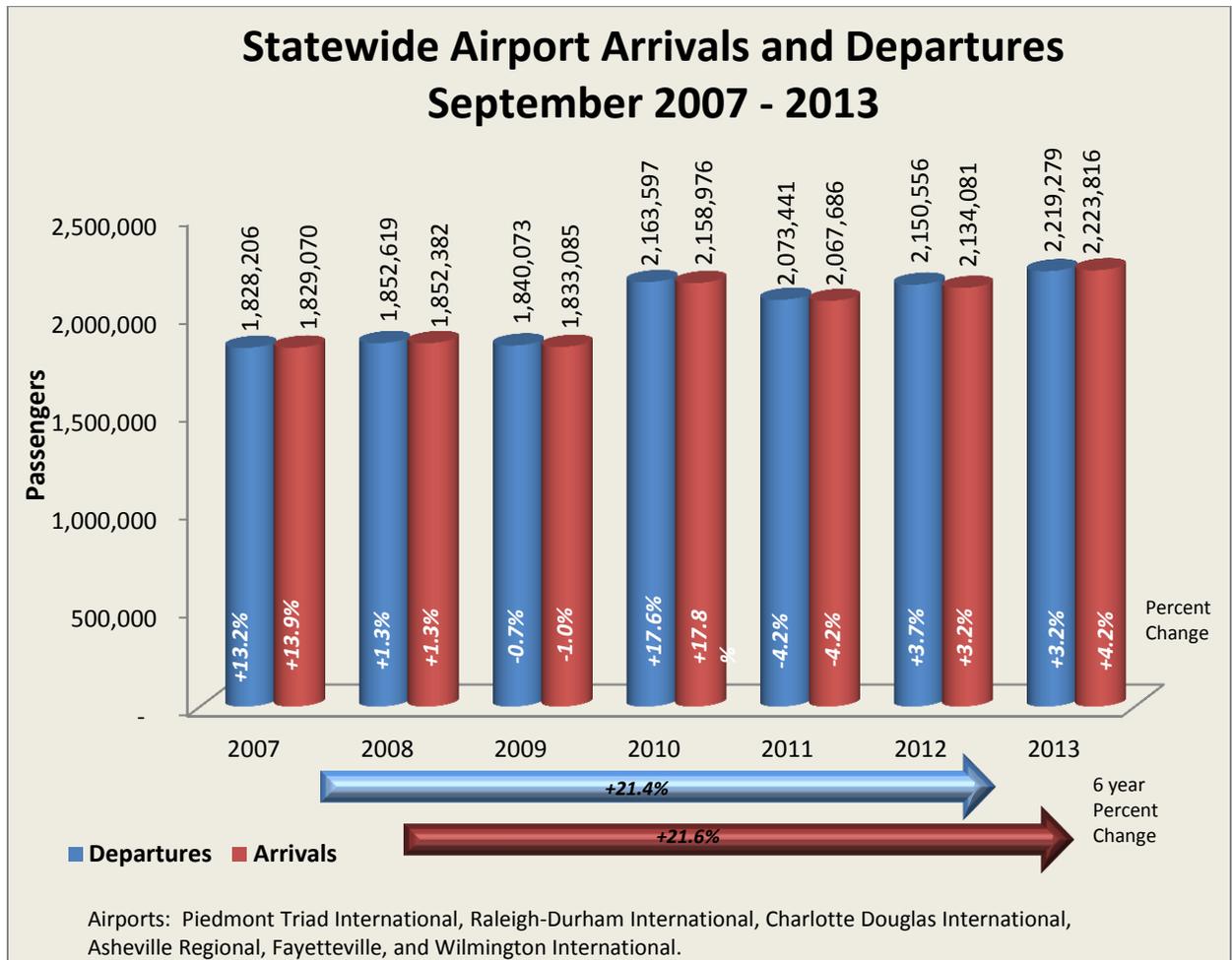


Chart 14 shows September airport arrivals and departures for each of the previous seven years. Both arrivals and departures were up over three percent in September 2013 from 2012 and there has been a substantial six-year increase in both for the month of September.

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

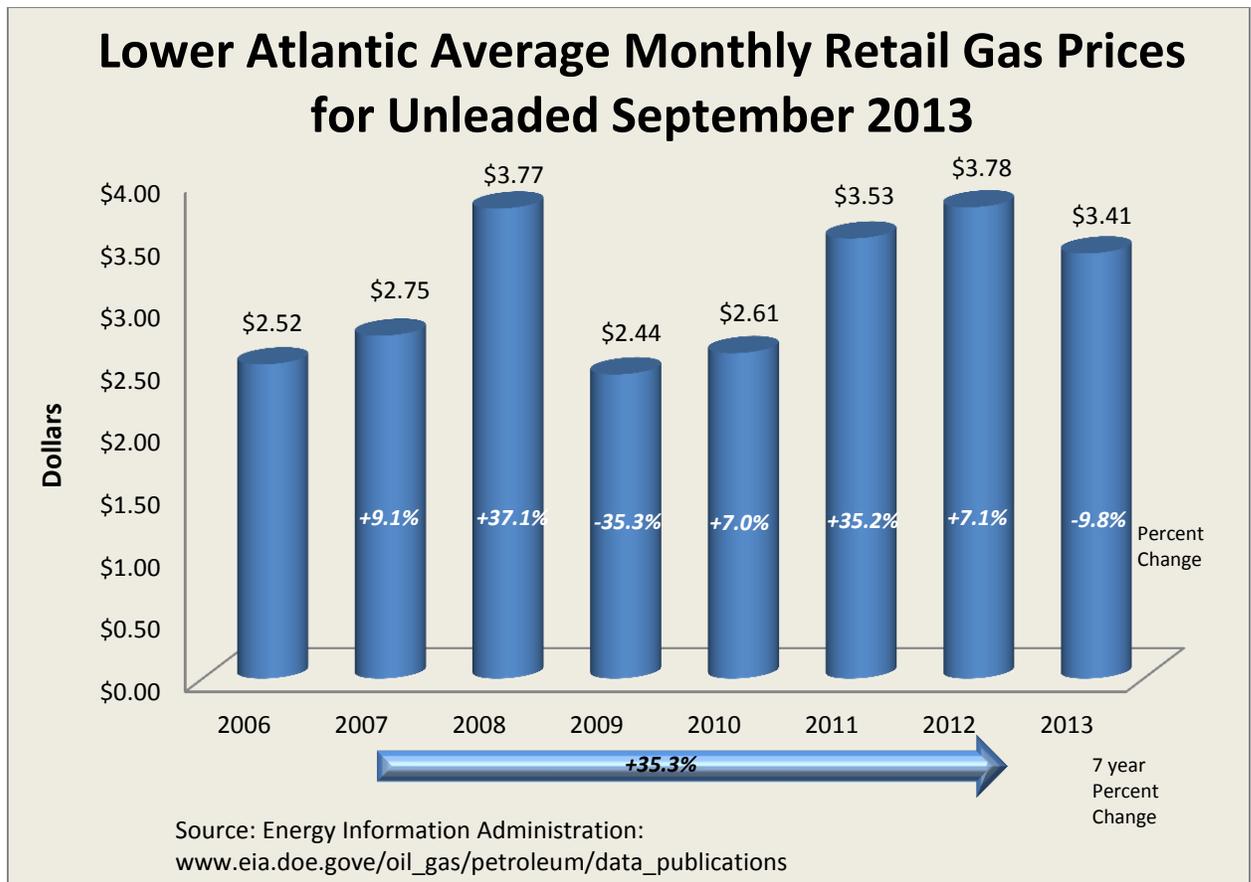


Chart 15 provides the average price per gallon of unleaded gasoline for September 2013 and the same month from the seven previous years. The data provided above, when compared with other indicators such as attraction attendance and visitor spending data, can be very helpful in the analysis of general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

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

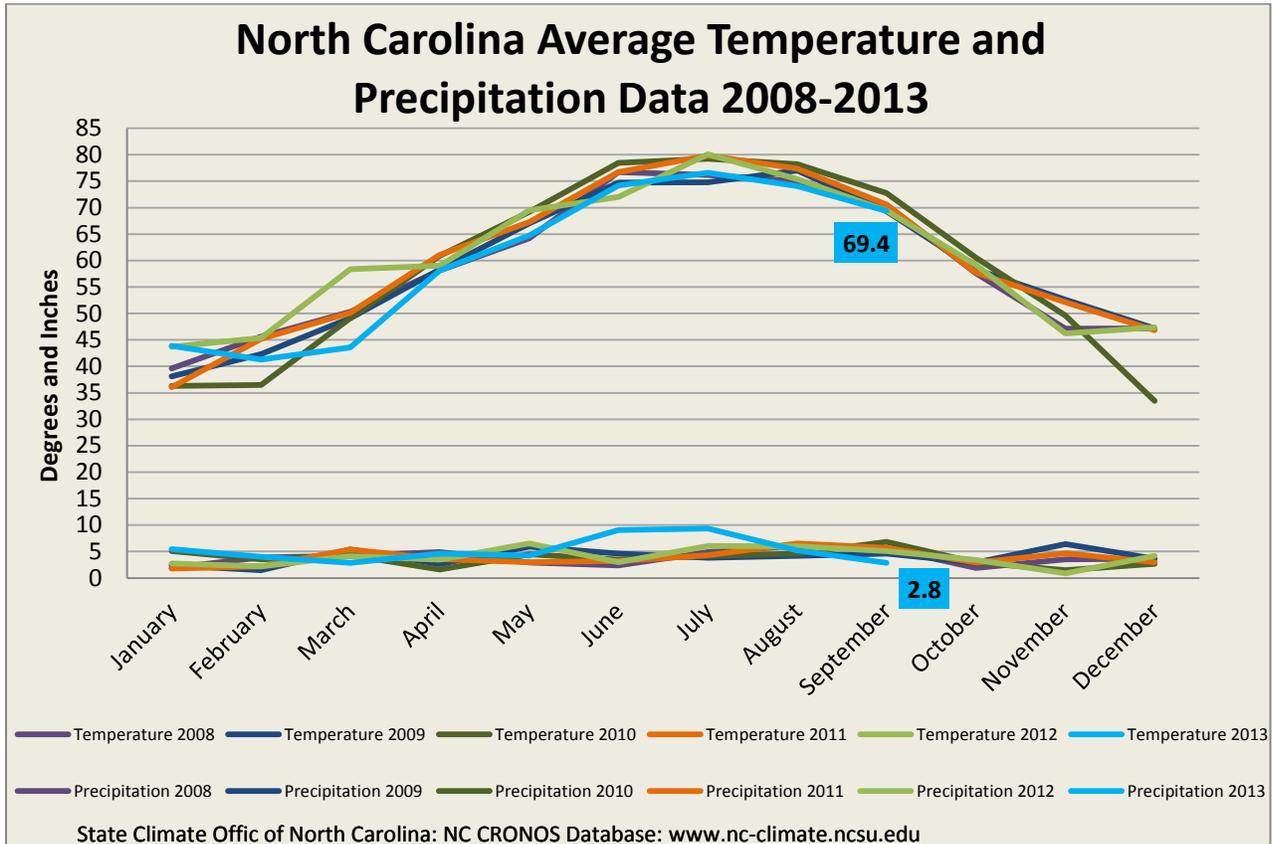


Chart 16 provides over 60 months of air temperature and precipitation data. This data, when analyzed together with gas price data and other tourism indicators, can be valuable in determining possible reasons for significant increases and/or decreases in indicators. For instance, greater than normal precipitation 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 September 2013

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

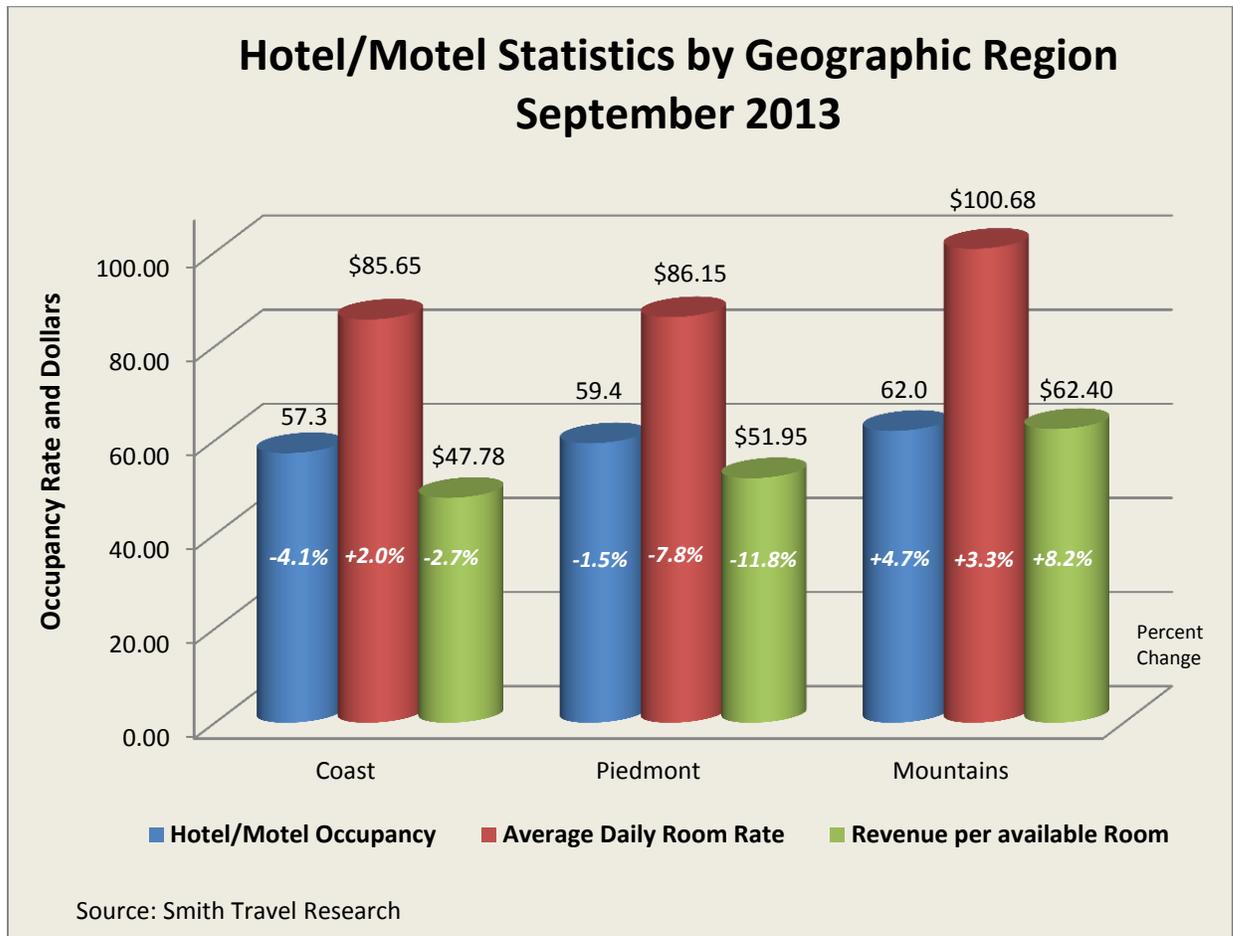


Chart 17 provides a one year comparison in lodging statistics for the three geographic marketing regions of North Carolina in September. Year over year lodging indicators show growth in the Mountain Region outpacing the other two regions, though the “DNC” effect should be taken into consideration when analyzing the Piedmont Region statistics.

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

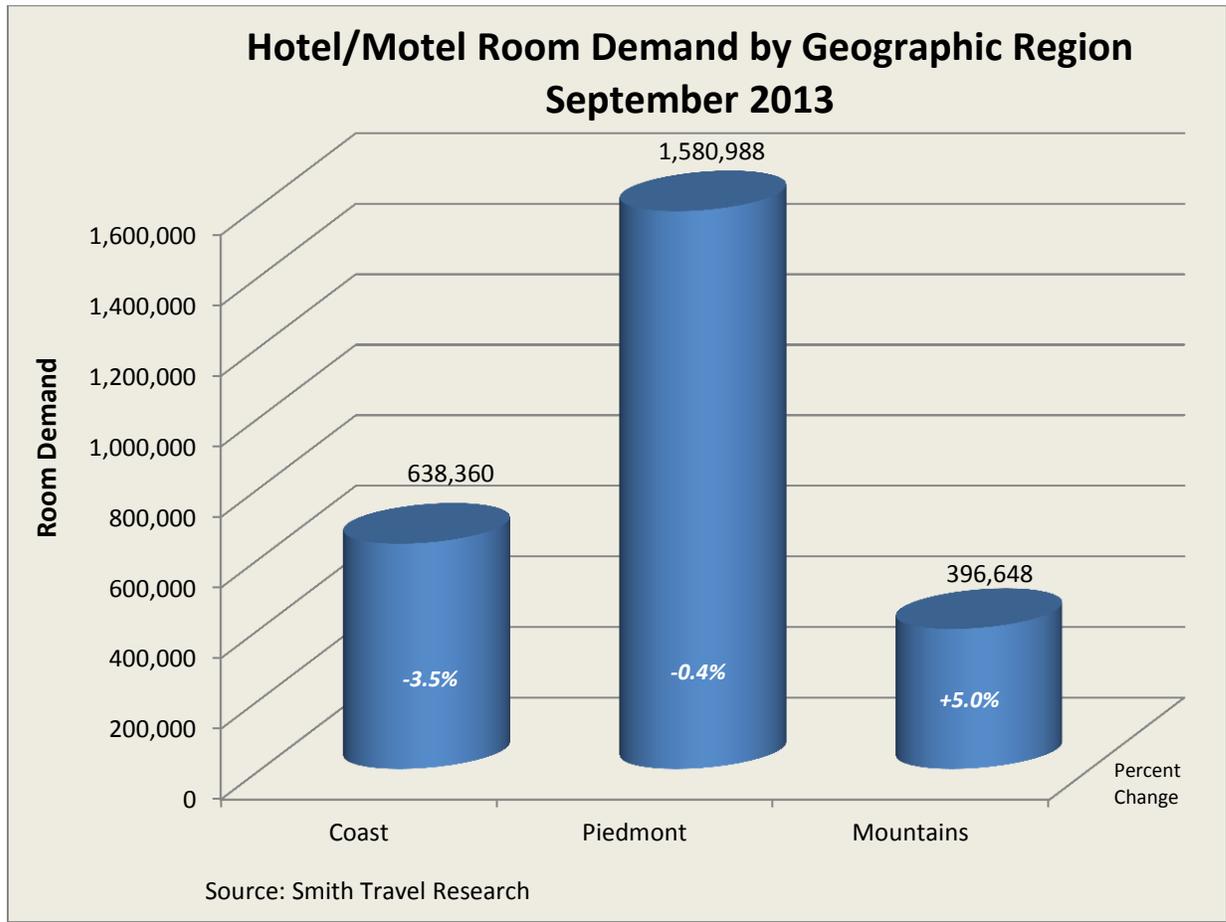


Chart 18 provides hotel/motel demand by geographic region for September 2013. Demand differs from occupancy in that it is the total number of rooms sold, not accounting for differences in room supply. The Mountain Region demand of lodging increased five percent from September 2012.

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

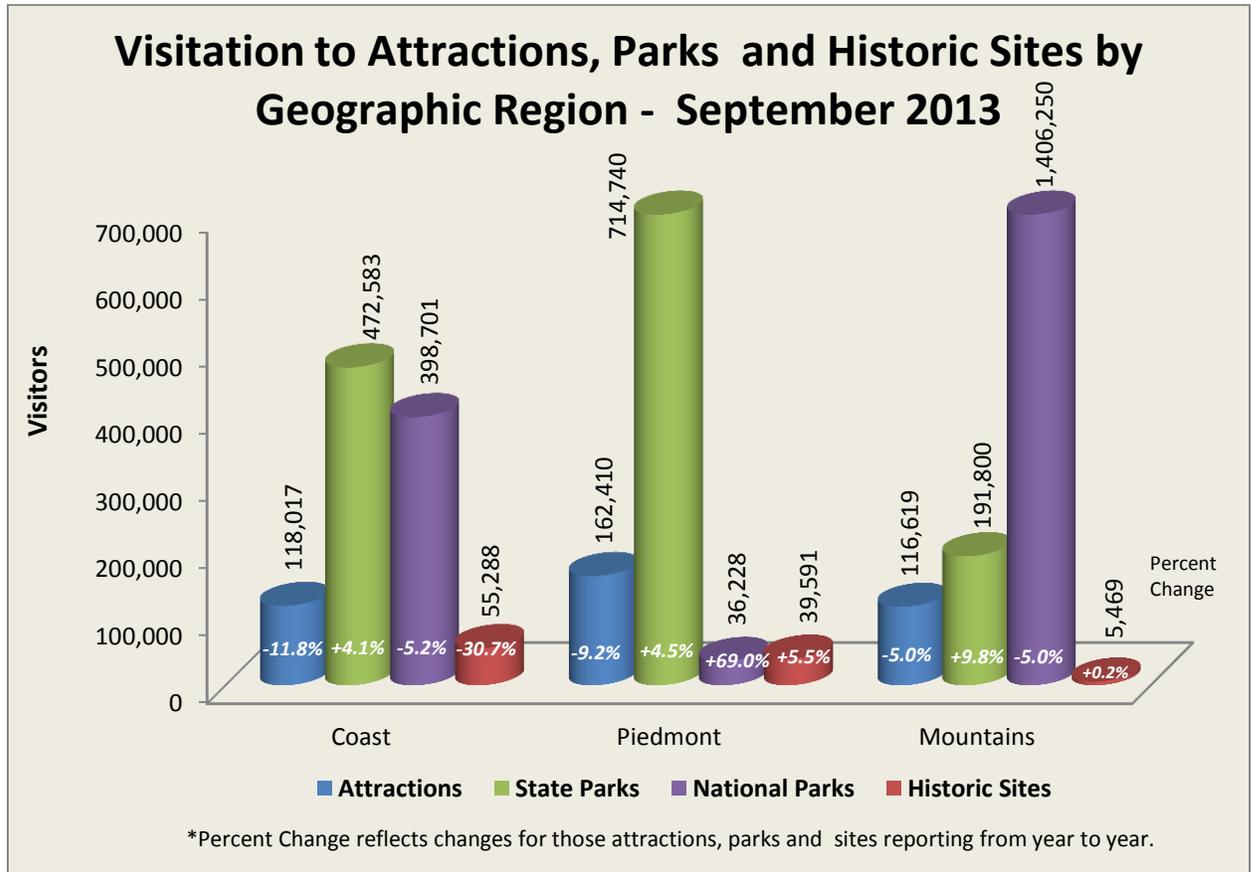


Chart 19 provides a look at the attractions industry in North Carolina in September 2013 by geographic region. As with the statewide numbers, the following data represents only a sample of North Carolina attractions that provide their attendance data, and are not intended to be considered a complete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

State park visitation was up in each of the geographic regions from September 2012 to September 2013, while national parks saw fewer visitors along the coast and in the mountains over this time period. Historic site visitation increased in the Piedmont Region but was flat in the Mountain Region and down in the Coastal Region.

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

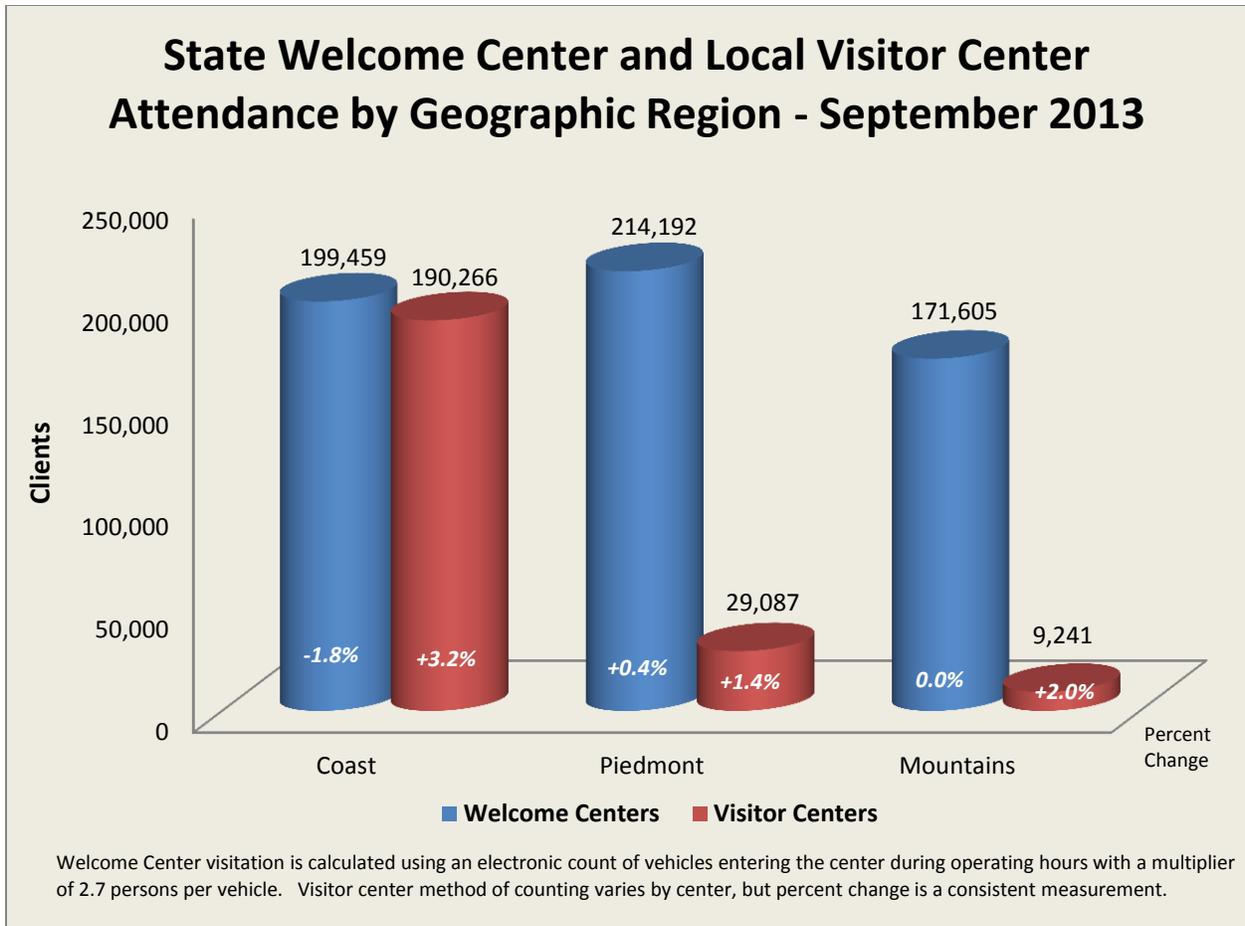


Chart 20 shows welcome center and visitor center attendance by geographic region and offers comparisons from September 2012. Welcome Center visitation was up three percent in the Coastal Region, but flat in the mountains and piedmont regions. Local center showed increases in each of the three regions from 2012 to 2013.

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

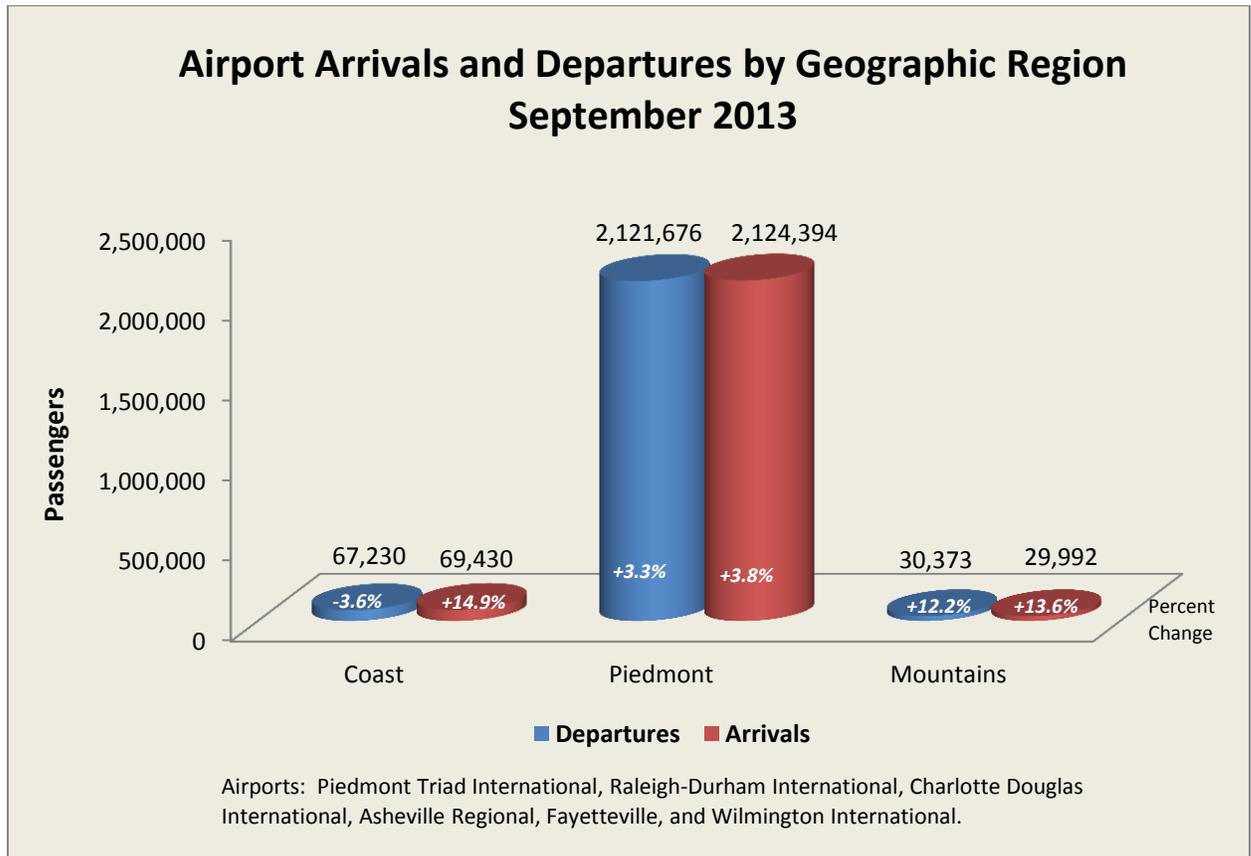


Chart 21 provides a breakdown of air travel statistics by geographic region. While the majority of air traffic is through the Piedmont Region, it is helpful to maintain a trend of other regional airport usage. All three regions showed growth in air arrivals in September from 2012, particularly the Mountain Region. It should be noted that differences in departures and arrivals in the Coastal Region for September are likely attributed to the Labor Day weekend spanning both August and September in 2013.

Section 3: Economic Development Region Tourism Indicator Analysis – September 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 - September 2013

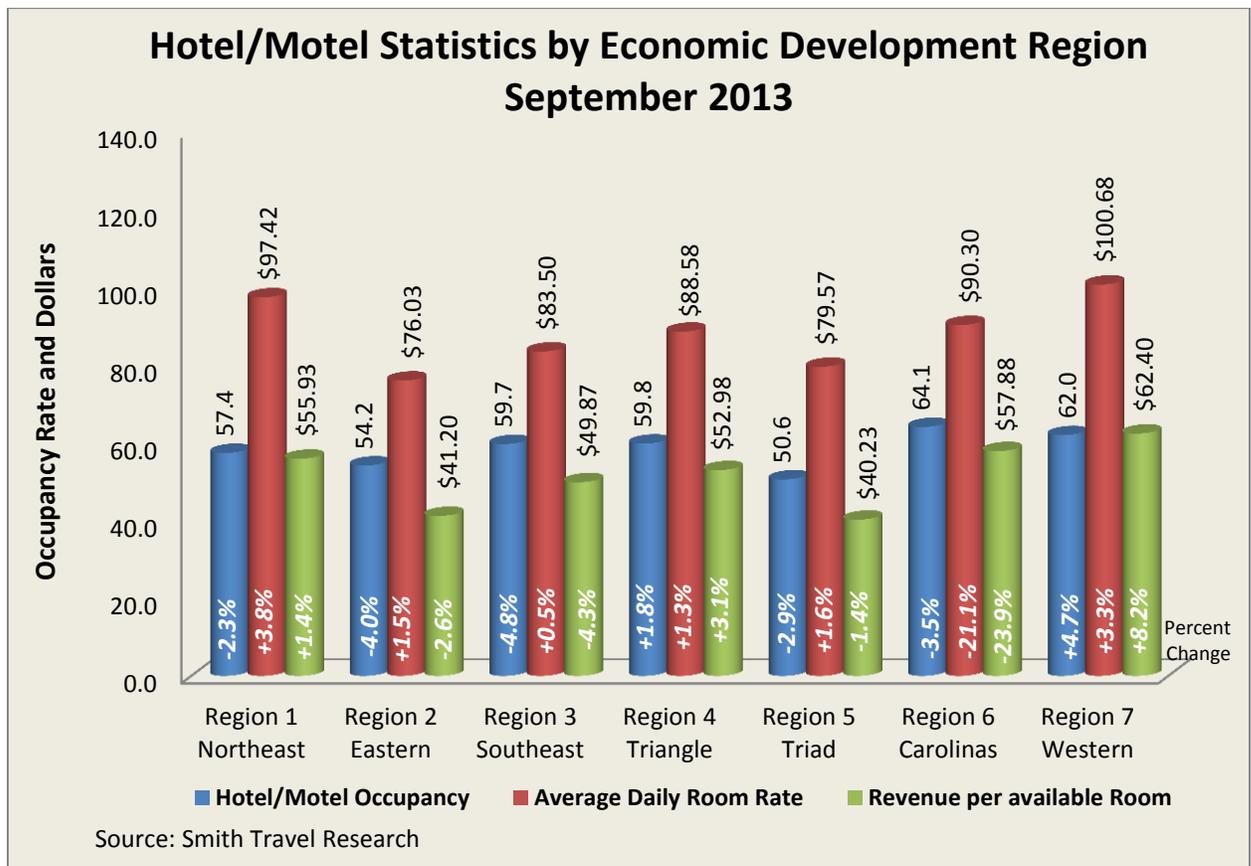


Chart 22 provides lodging indicators for September 2013 by economic development region. Also shown are percent changes from September 2012. This graph allows individual regions within the state to track indicators specific to their general destinations, while still being able to compare their data to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

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

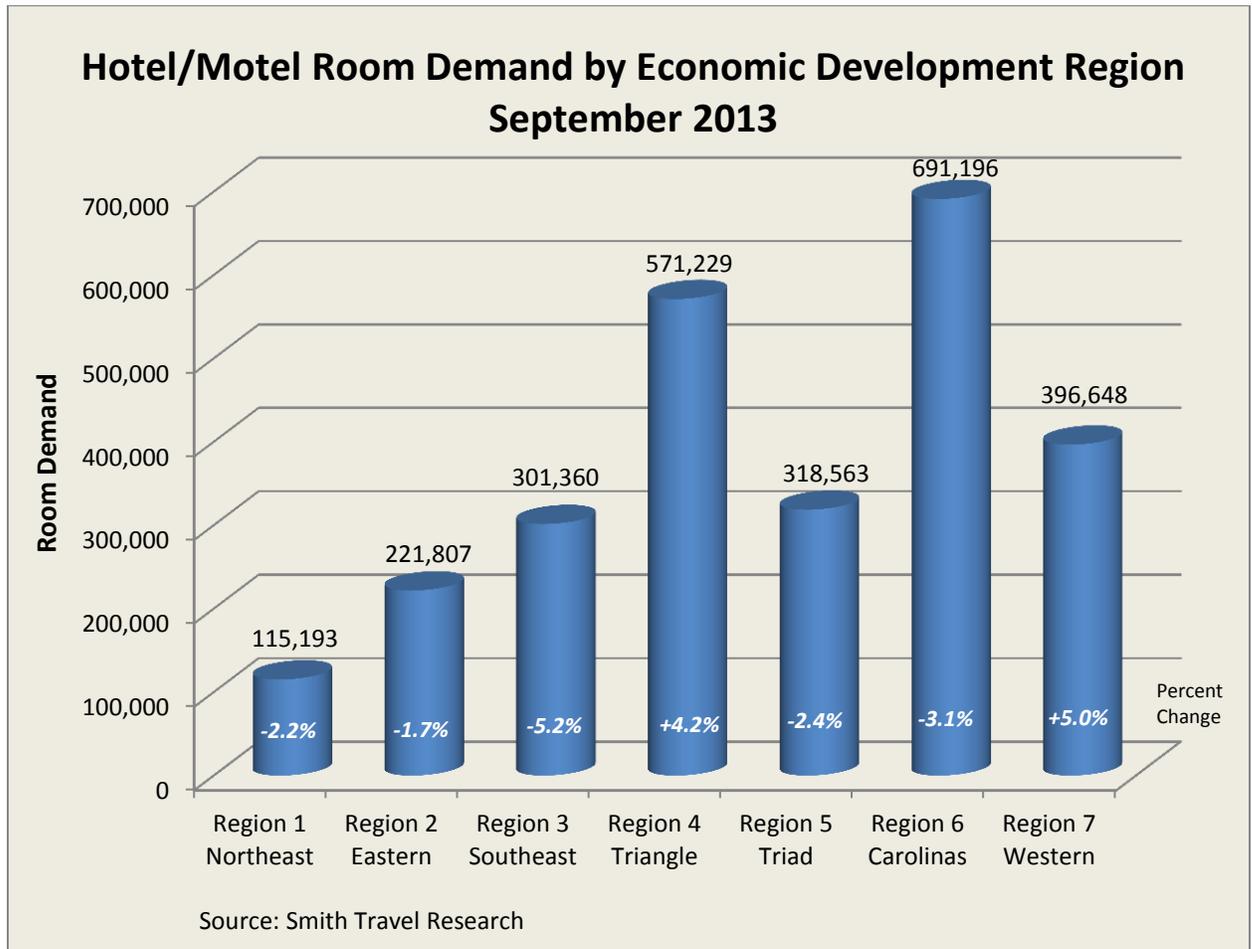


Chart 23 depicts hotel/motel demand for the month of September 2013 by economic development region. Demand is the number of rooms sold excluding complimentary rooms. The Western and Triangle regions each showed positive demand growth from 2012 to 2013.

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 – September 2013

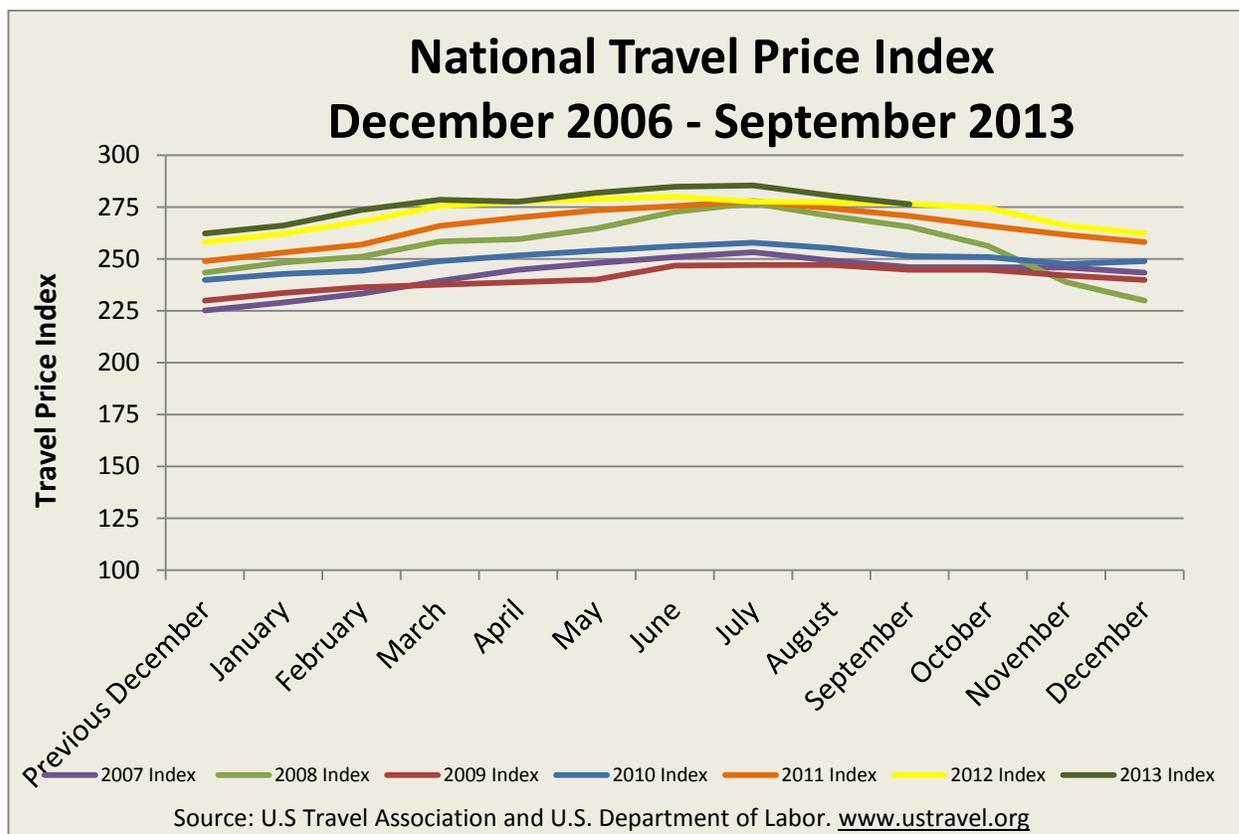


Chart 24 provides a seven year trend of the National Travel Price Index (TPI). Steady growth was experienced through mid-2008; however in November 2008, it is clear that as the TPI fell below 2007 levels, the tourism industry began feeling the full effect of the recession. In December 2010, the TPI finally inched above the each of the previous Decembers, and continued that year-over-year growth into June 2011. 2013 travel price increases through August have steadily been between 1-2% above 2012 prices, with the exception of July when the increase was nearly three percent. TPI in September was flat with 2012.

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