



July 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 July 2013

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

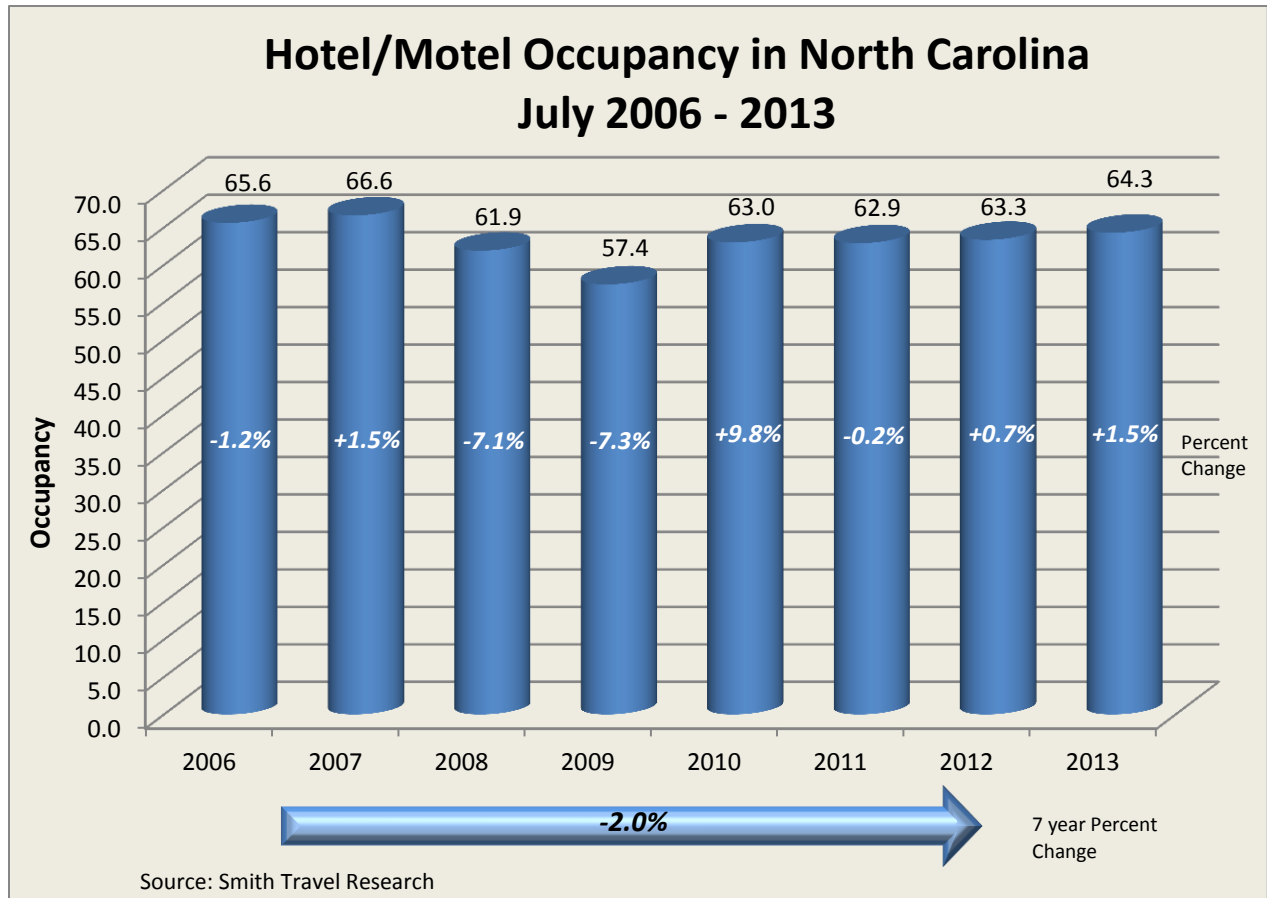


Chart 1 provides a comparison over a seven year period to show the trend of occupancy in the state for the month of July. Occupancy for July 2013 was up just over one percent from July 2012. *Occupancy at the national level increased by 1.7% in July 2013 from the previous year.*

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

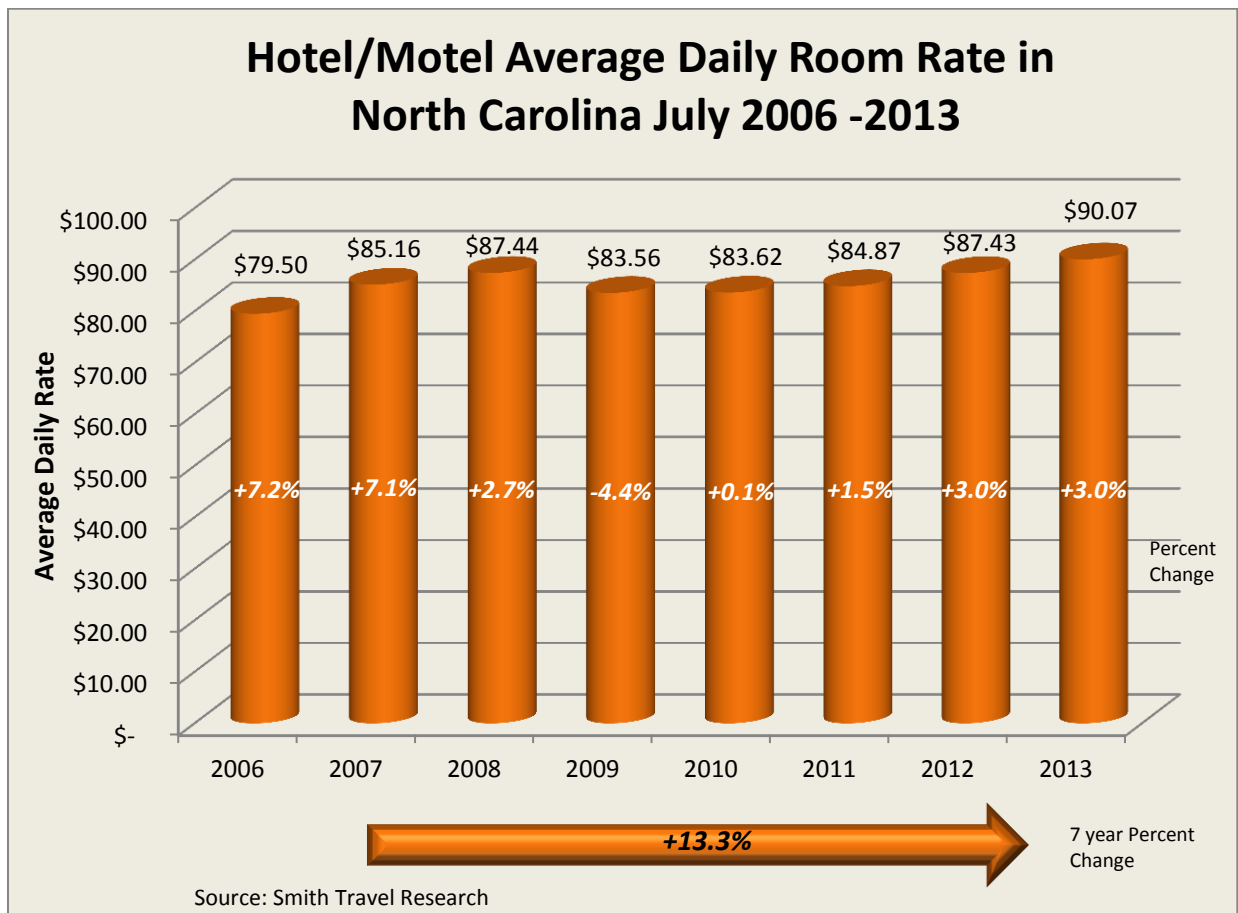
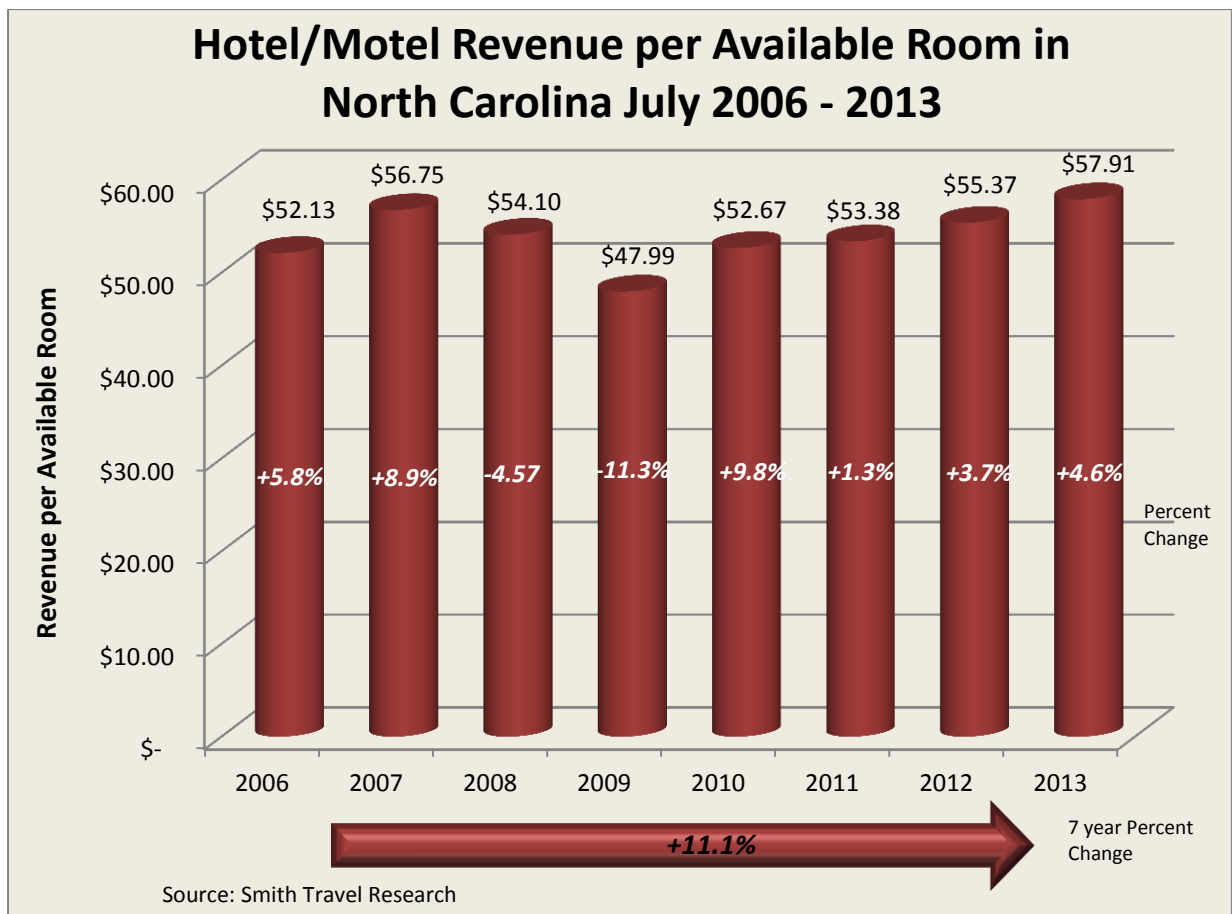


Chart 2 provides a comparison over a seven year period to show the trend of average daily room rate (ADR) in the state for the month of July. ADR increased three percent in July, and is up over thirteen percent over the last seven years. The ADR of \$90.07 was the highest on record for a July in North Carolina. ADR at the national level was up 4.1% in July 2013 from the previous July.

Chart 3 – Hotel/Motel Revenue per Available Room in North Carolina - July 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 July. RevPAR was up nearly five percent in July 2013, and at \$57.91 was the highest RevPAR on record for the month of July in the state. *RevPAR at the national level was up 5.8% in July 2013 from the previous July.*

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

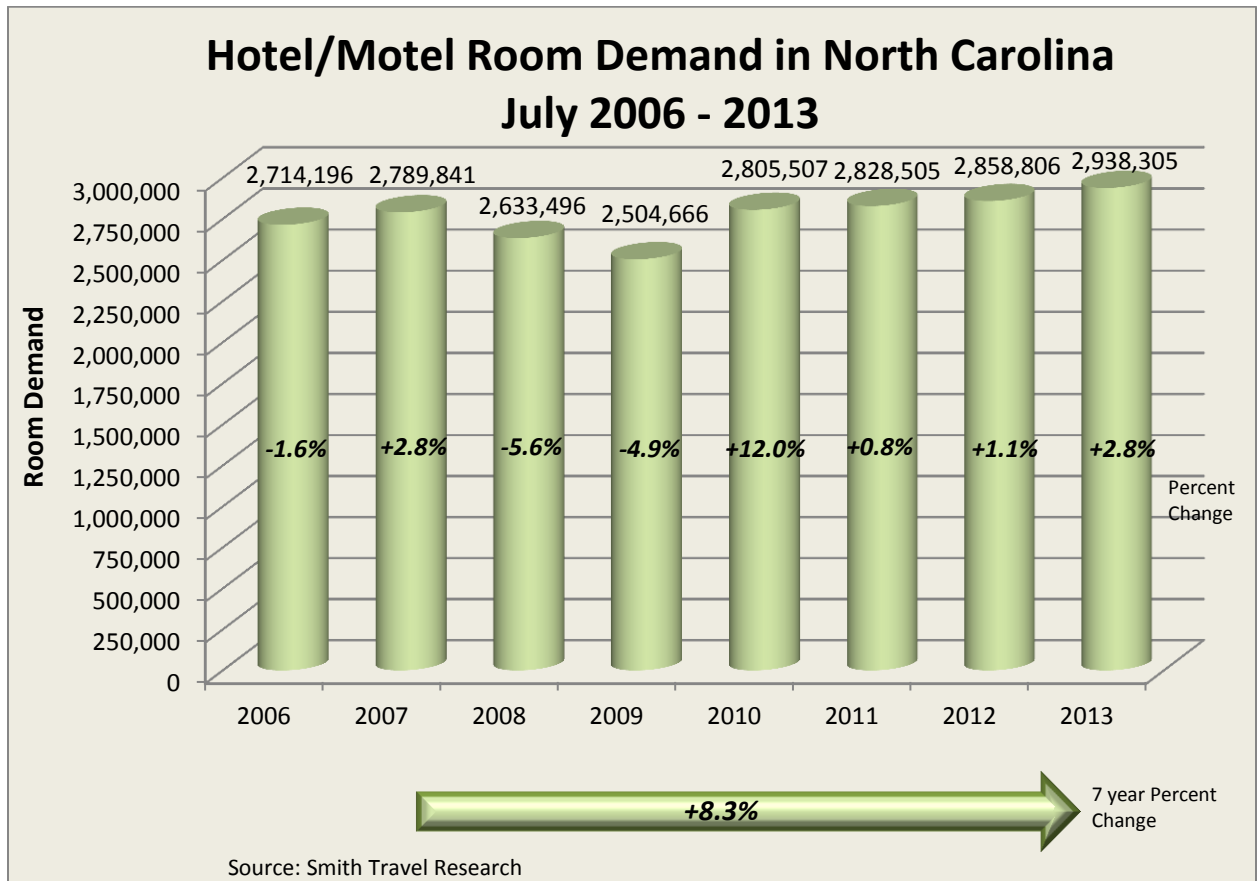


Chart 4 depicts hotel/motel demand for the month of July 2013 with comparisons to the previous seven years. Demand is the number of rooms sold excluding complimentary rooms. Room demand for July was up nearly three percent from 2012, and at a record high with over 2.9 million rooms sold. *Room demand at the national level saw an increase of 2.5% change in July 2013 from the previous July.*

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

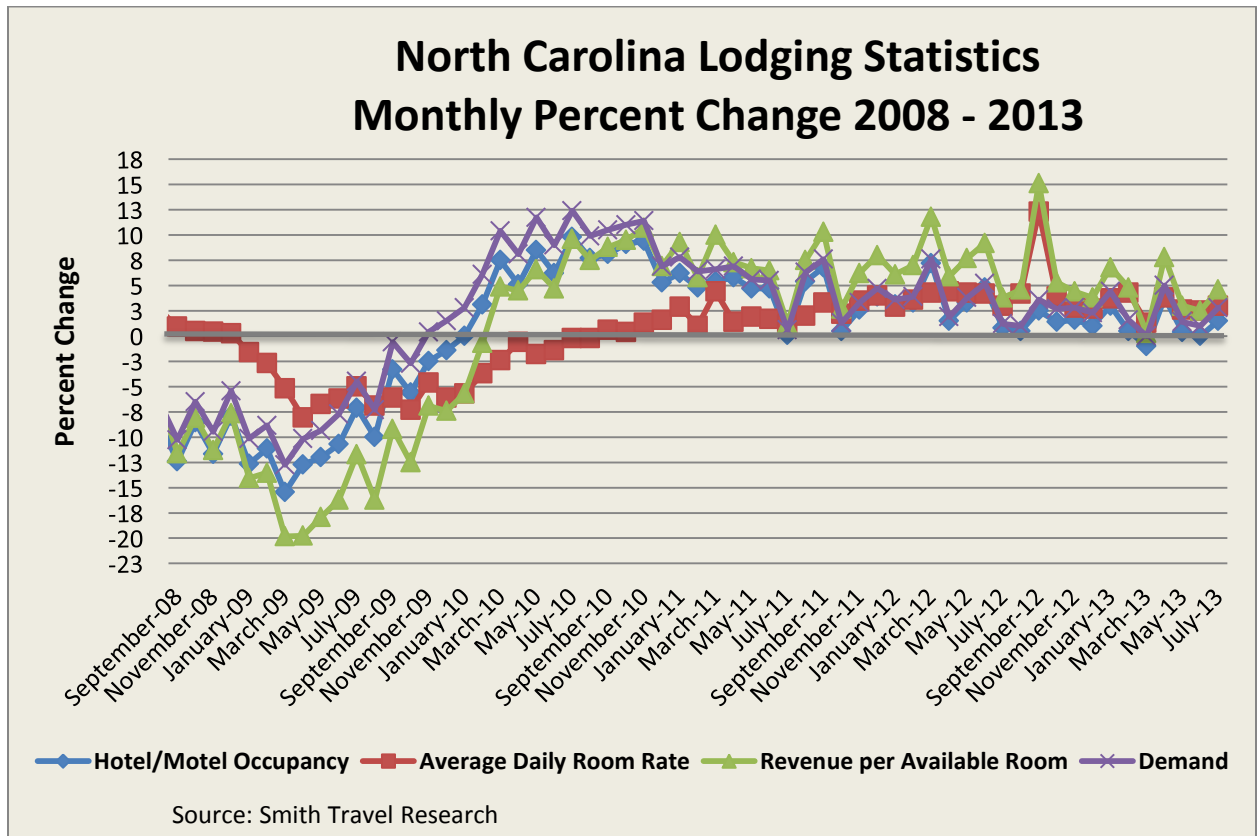


Chart 5 provides a monthly percent change for the four major lodging indicators. The chart allows for a five year trend-line analysis that clearly depicts that the major indicators have shown a steady positive change since early 2010, and while showing some softening, still remains in the positive range.

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

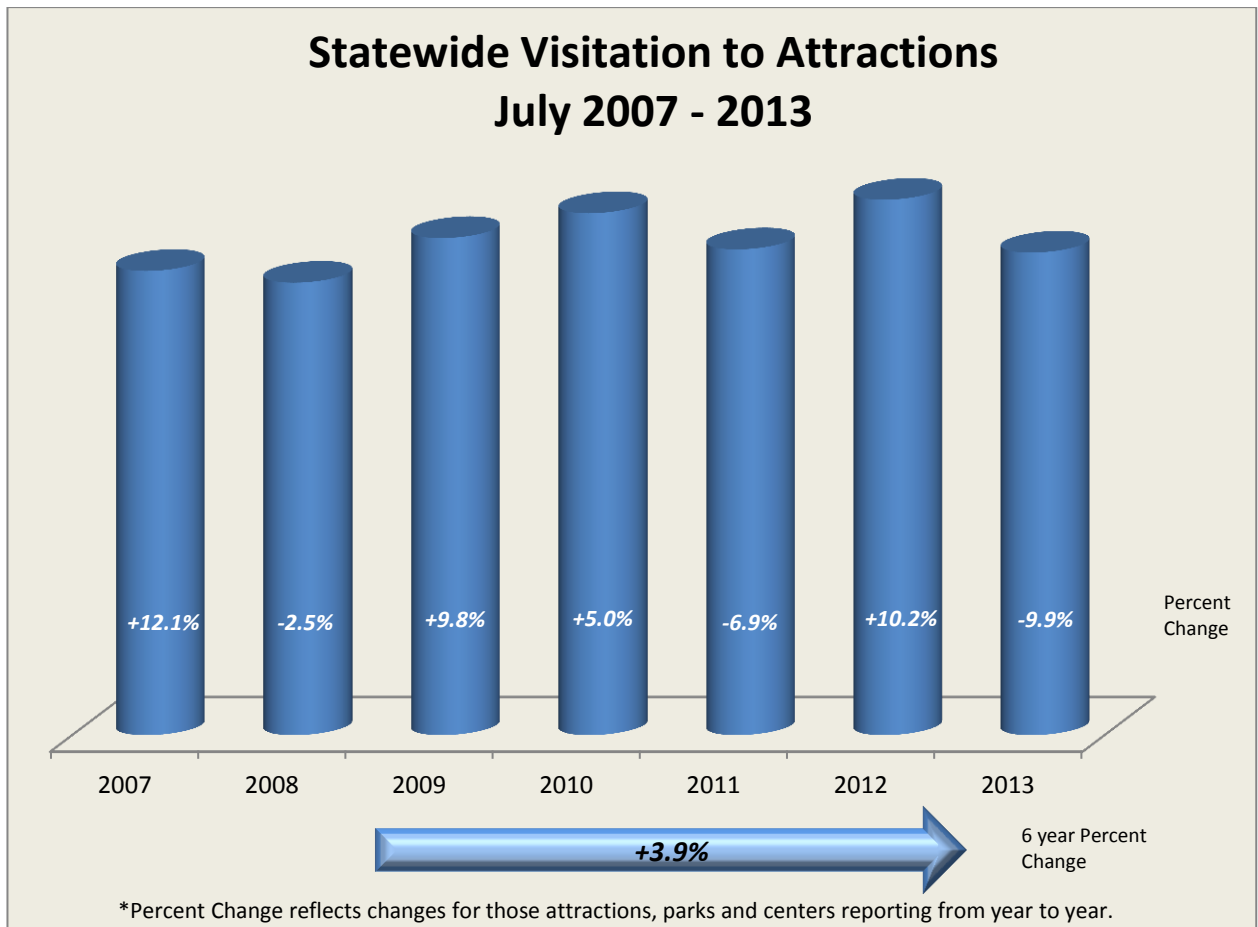


Chart 6 provides a status of the attractions industry in North Carolina for the month of July for the last seven years. The graph represents only a sample of North Carolina attractions that provide their attendance data, and is not intended to be considered a complete list of attractions. However, the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

July attraction attendance was down ten percent from 2012, however attendance for the month has increased four percent since 2007. Much higher than normal precipitation for July (as shown later in report) likely had a negative effect on many of the state's outdoor attractions for the month.

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

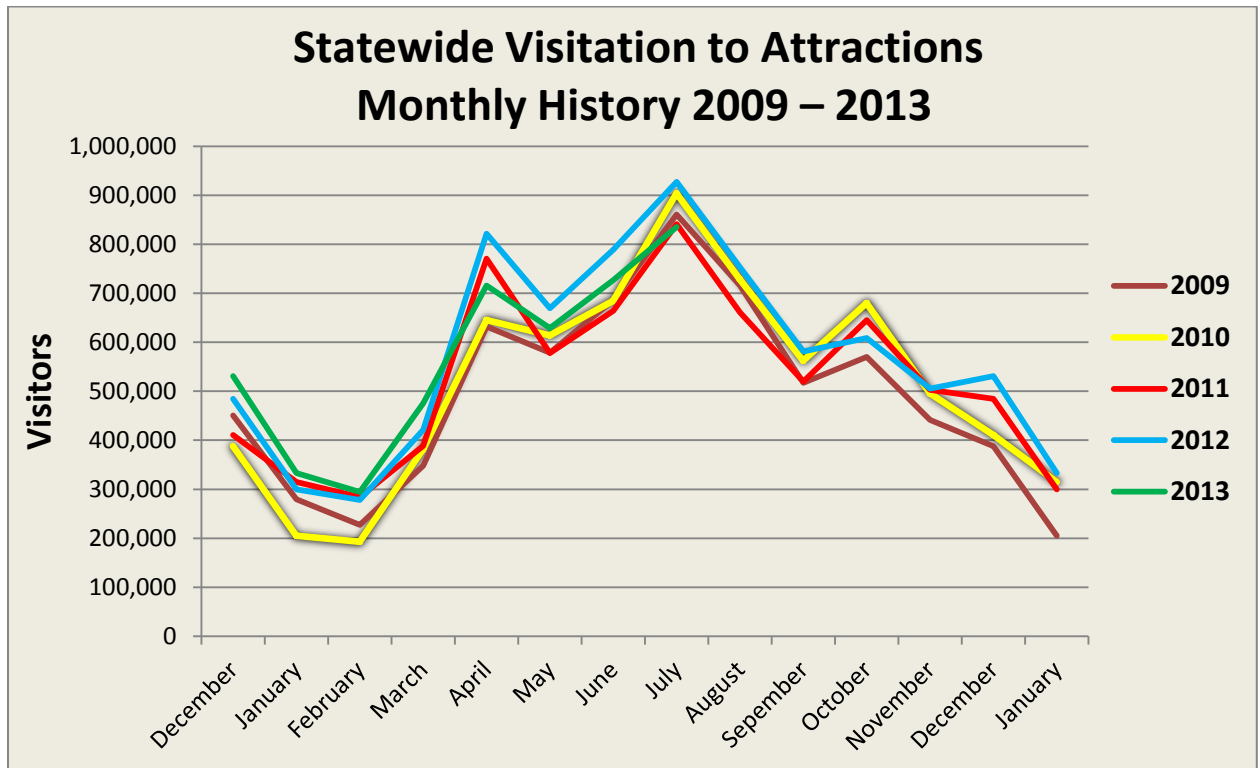


Chart 7 shows a monthly trend of attraction visitation for each of the last five years. This chart allows for a view of the ebb and flow of monthly attraction attendance, while also providing a look at how attendance compares to the same month of the previous years. Not surprisingly, the winter months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

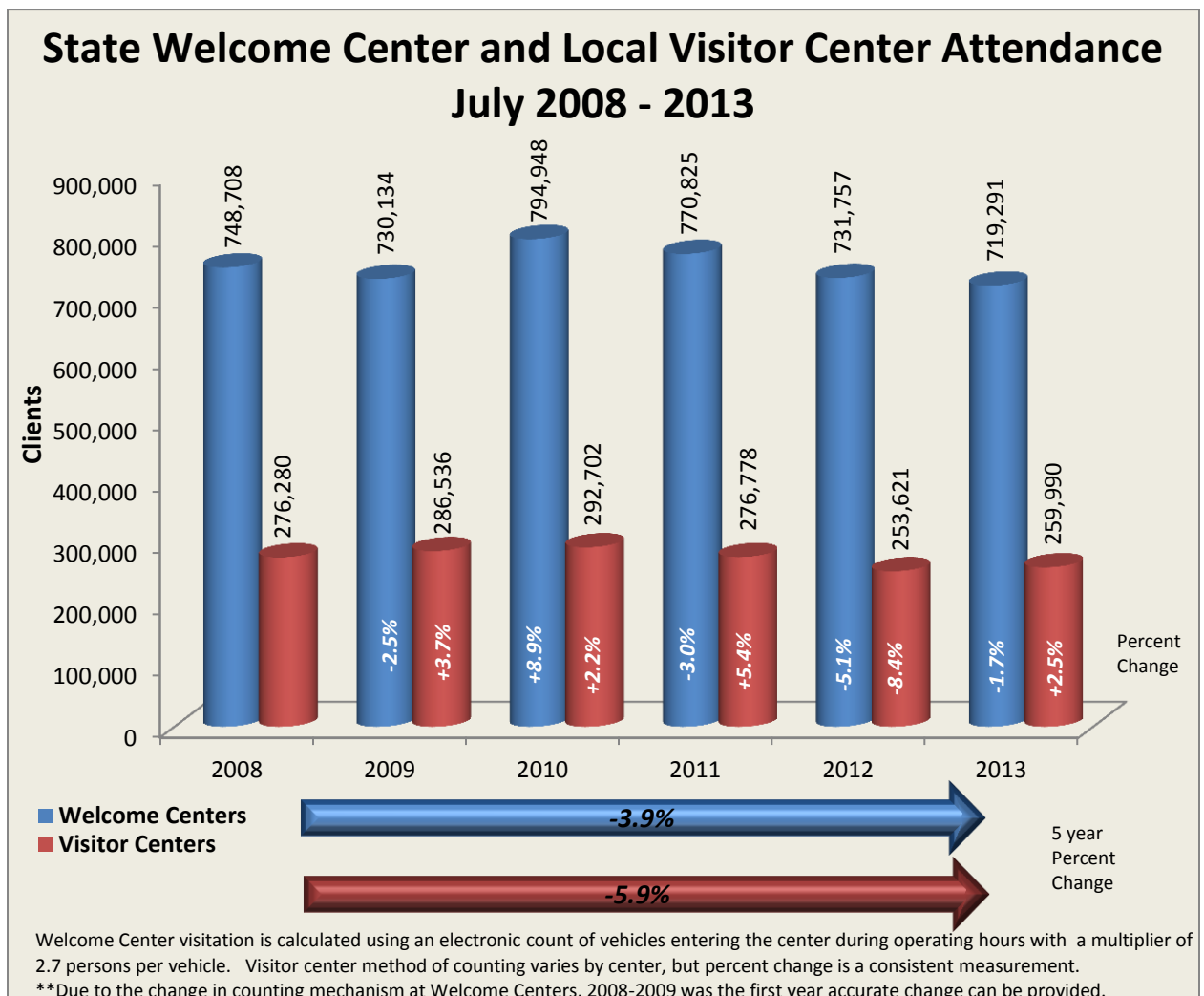


Chart 8 provides July visitation statistics for State Welcome Centers, as well as Local Visitor Centers throughout North Carolina. It should be noted that while there is a percent change indicated for welcome centers for 2007-2008 and 2008-2009, 2008 was the first year a percent change could accurately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

July welcome center was down just less than two percent statewide from last year, and local visitor center visitation was up nearly three percent from last July.

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

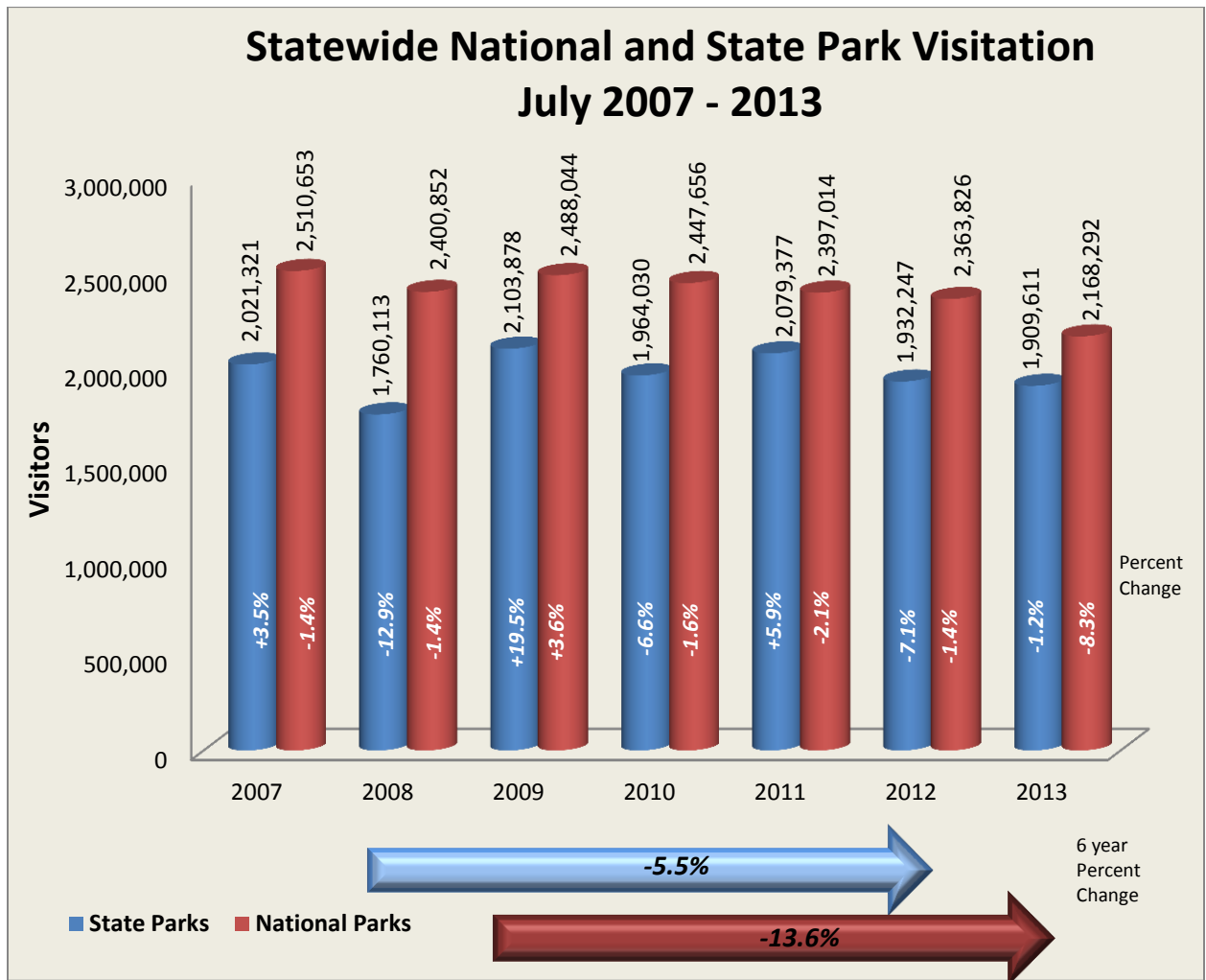
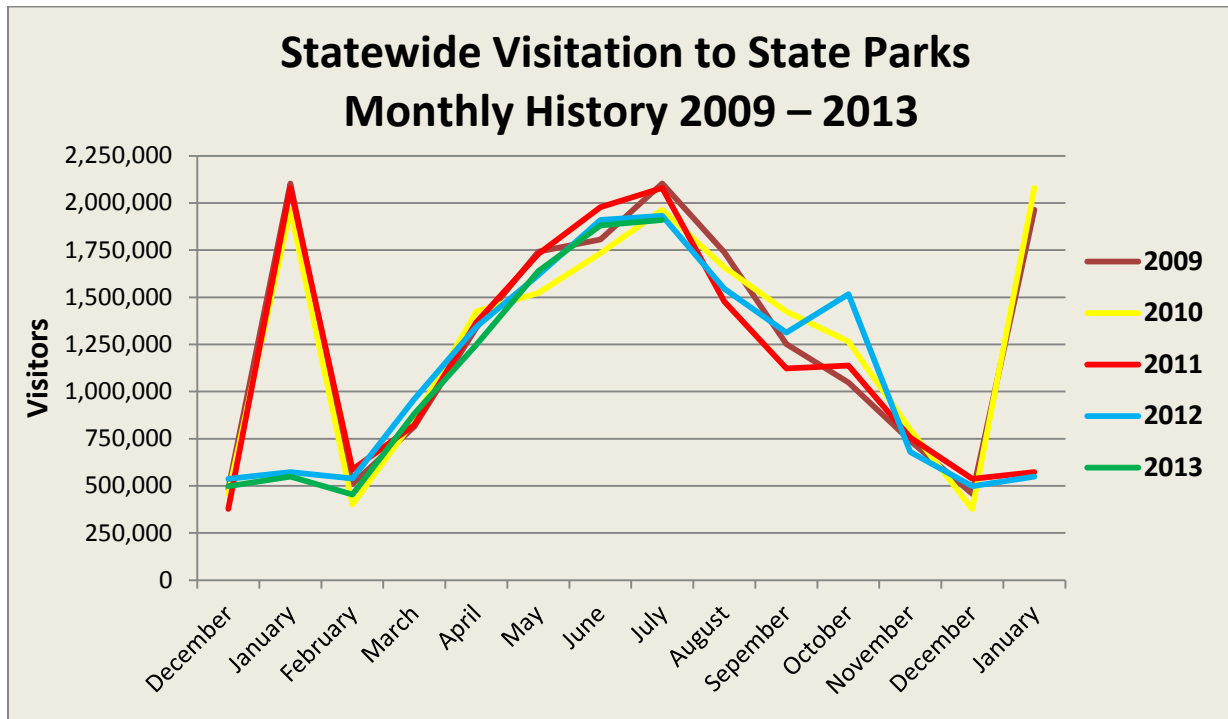


Chart 9 depicts visitation to state and national parks in North Carolina for the last seven years months of July. State park visitation was down about one percent in July from 2012. However, national park visitation was down just over eight percent. Greater than normal precipitation affected attendance at many parks throughout the state in July.

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

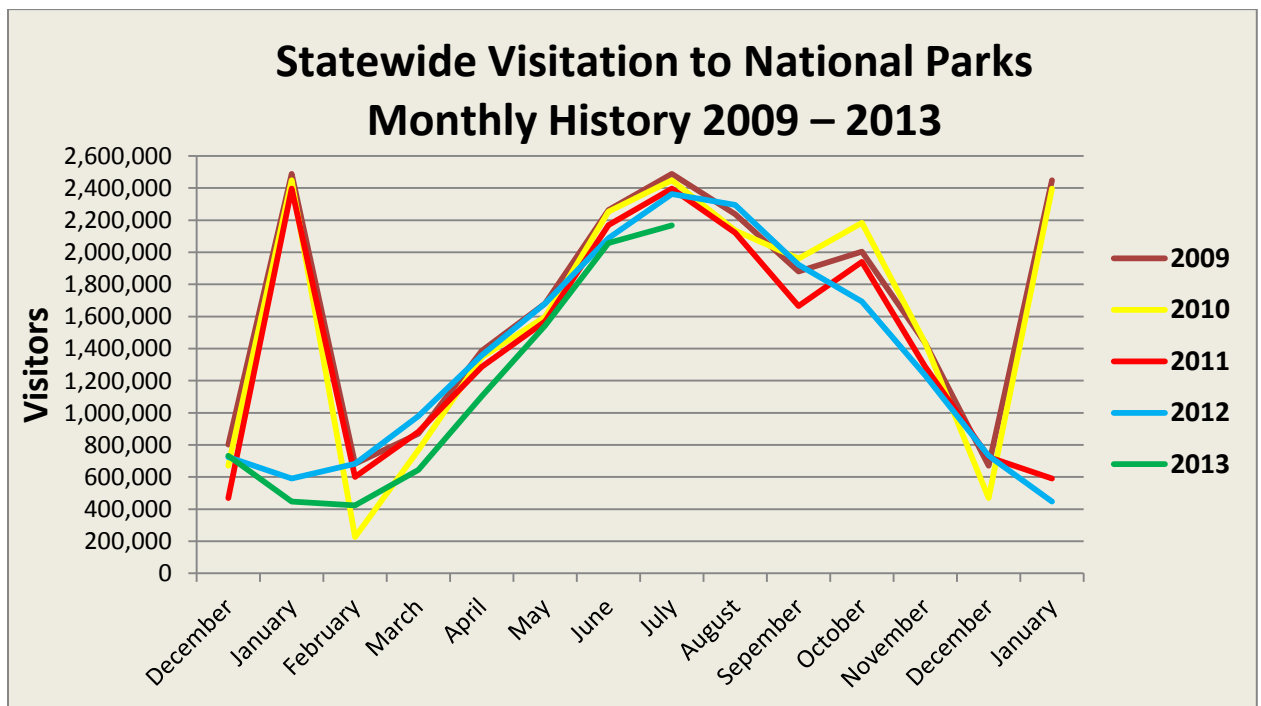


Chart 12 – Statewide Historic Sites Visitation - July 2009 – 2013

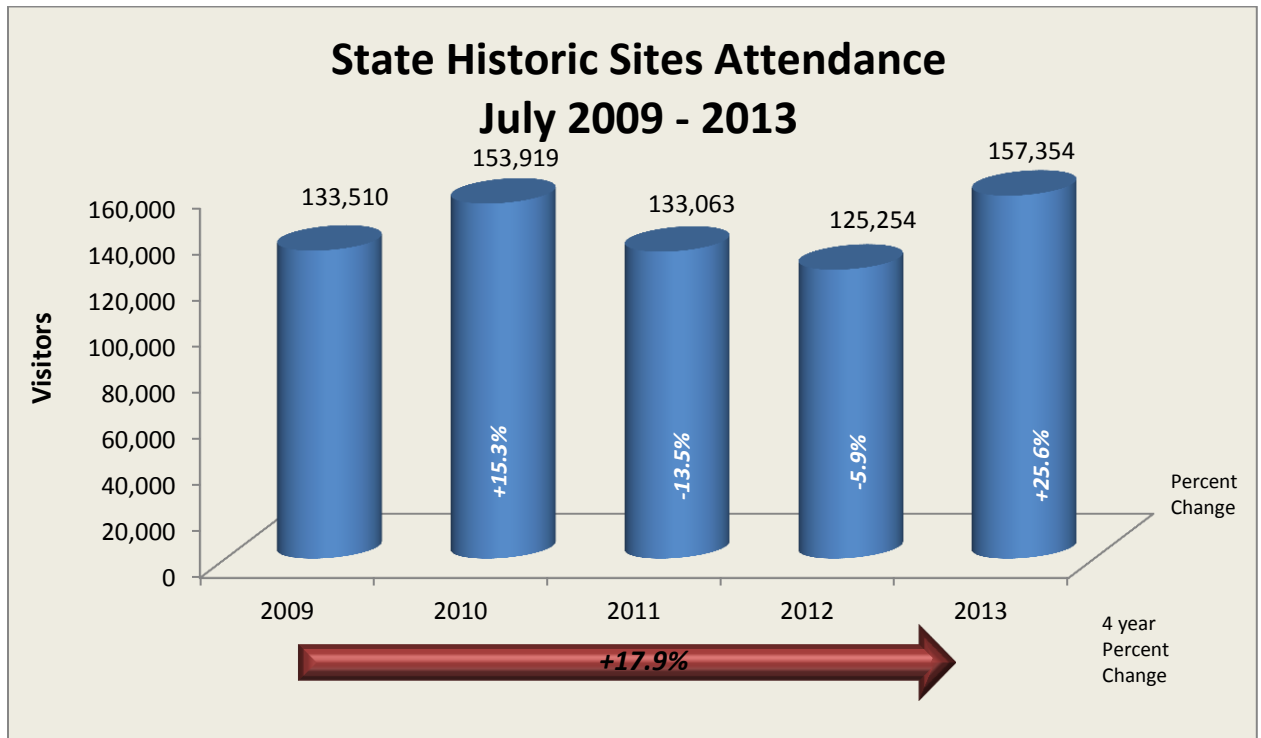


Chart 12 depicts visitation to State Historic Sites in North Carolina for the last five years of July. As this report has just begun tracking historic site visitation, more data is needed to determine the trend.

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

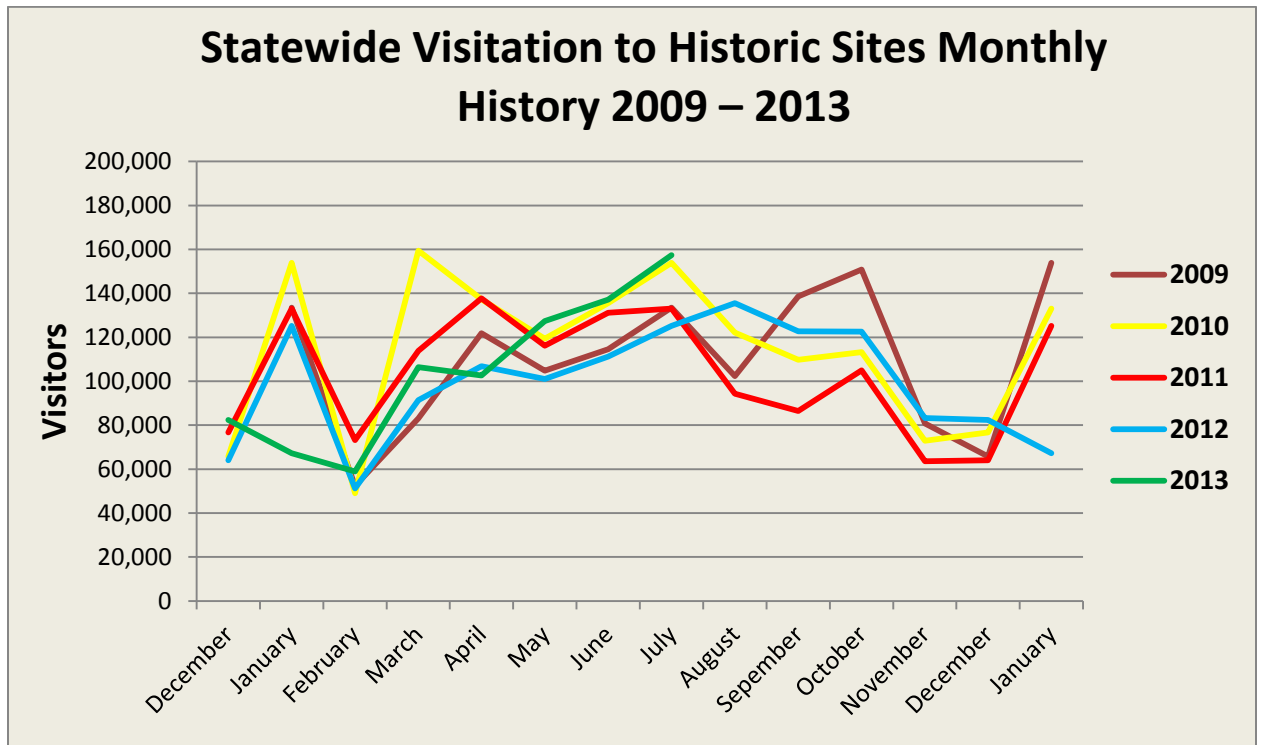


Chart 14 – Statewide Airport Arrivals and Departures - July 2007 – 2013

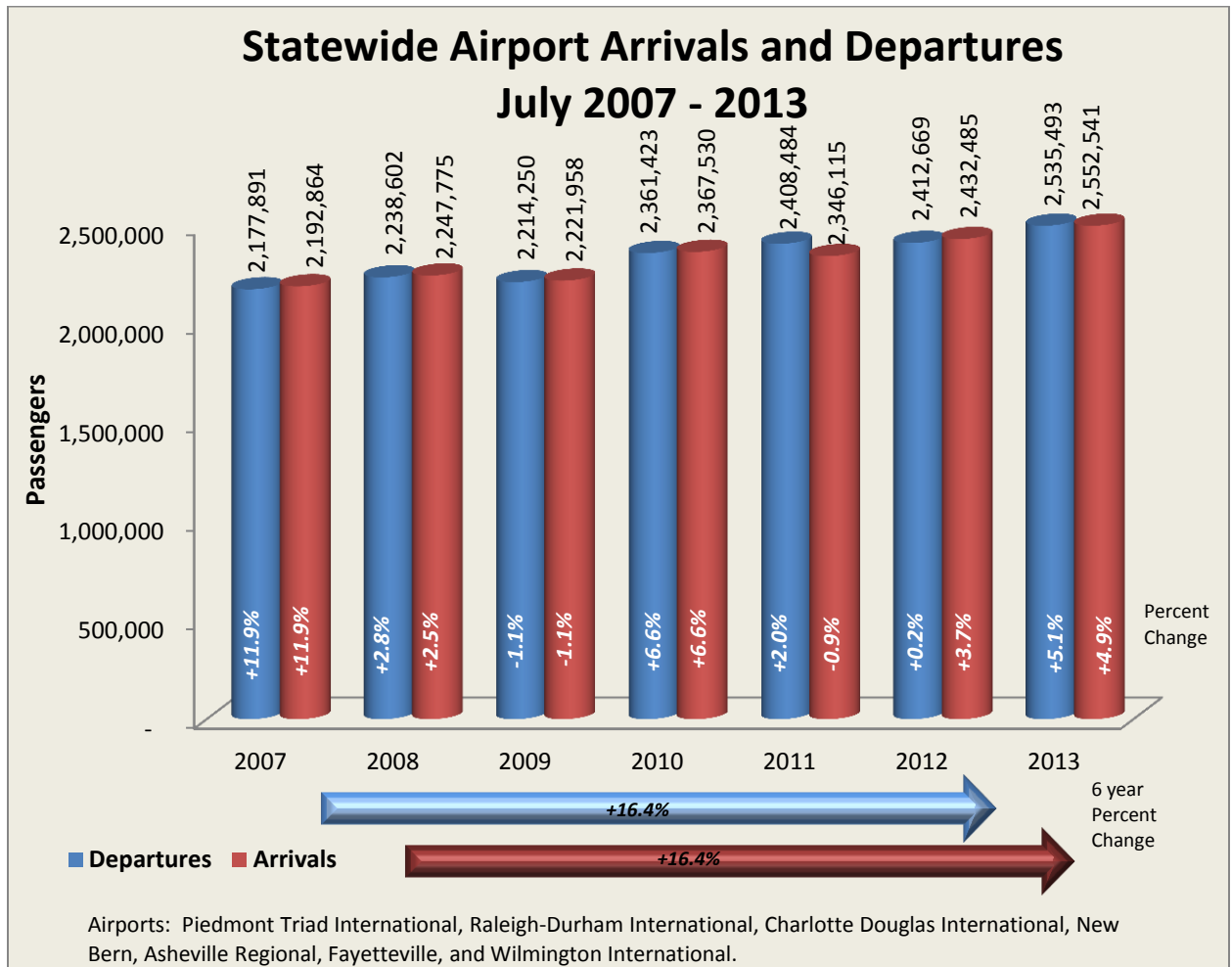


Chart 14 shows July airport arrivals and departures for each of the previous seven years. Both arrivals and departures were up five percent in July 2013 from 2012 and there has been a substantial six-year increase in both for the month of July.

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

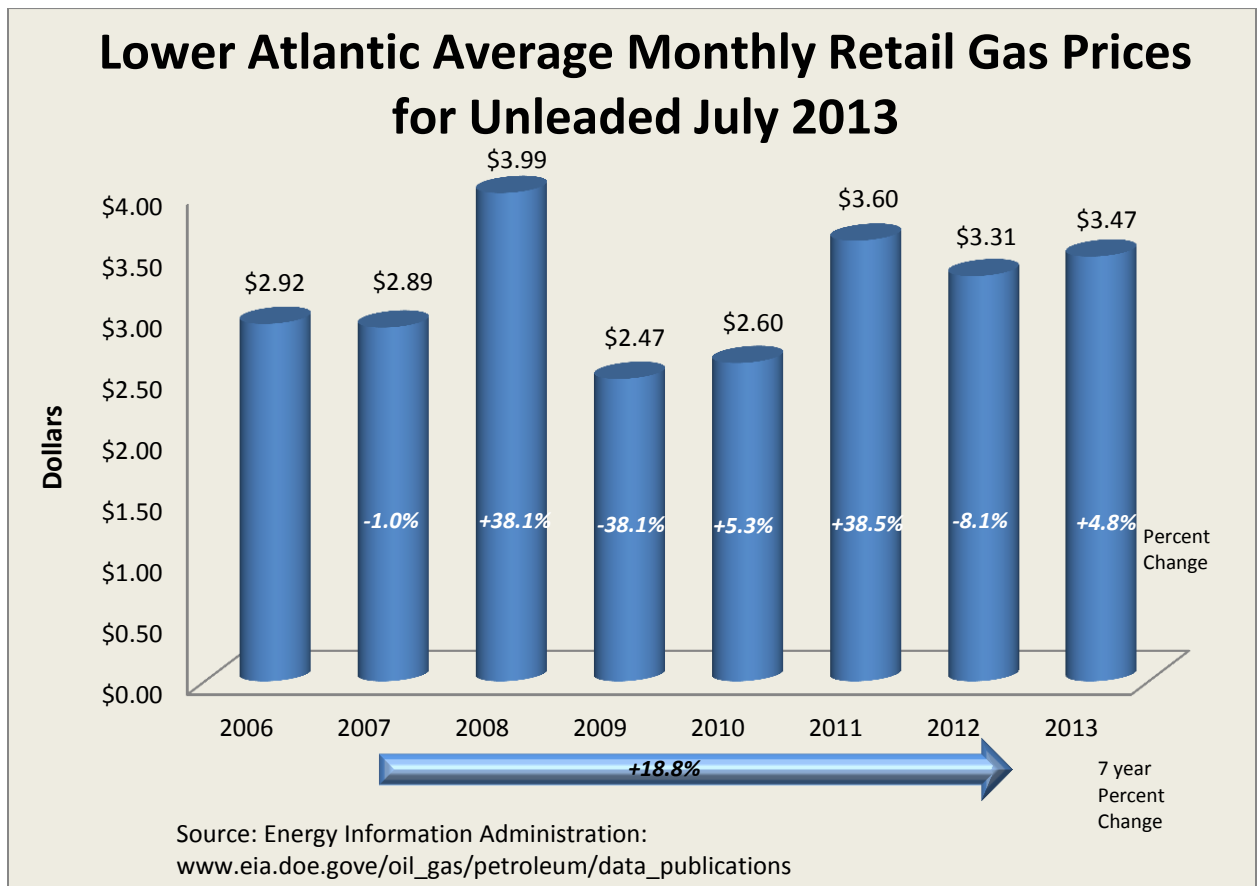


Chart 15 provides the average price per gallon of unleaded gasoline for July 2013 and the same month from the seven previous years. The data provided above, when compared with other indicators such as attraction attendance and visitor spending data, can be very helpful in the analysis of general travel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

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

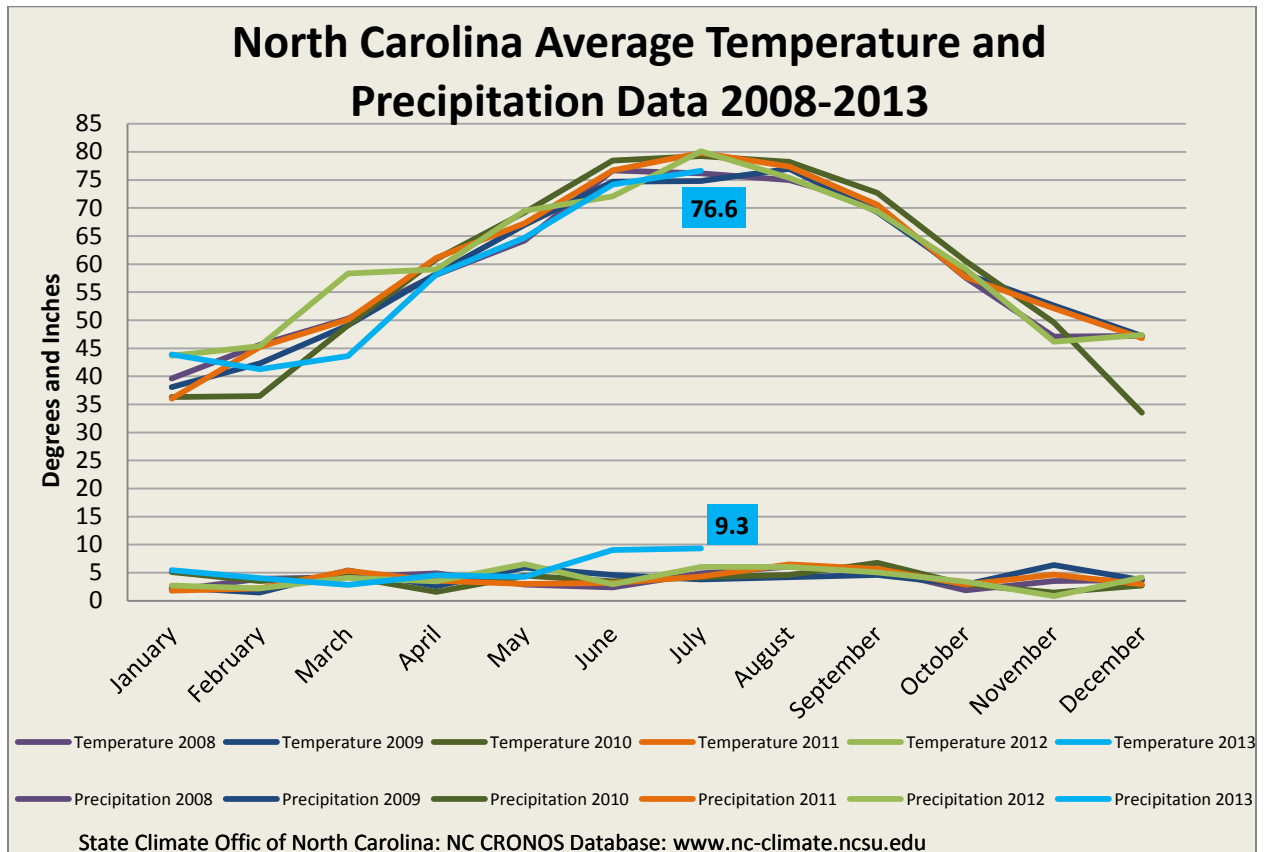


Chart 16 provides over 60 months of air temperature and precipitation data. This data, when analyzed together with gas price data and other tourism indicators, can be valuable in determining possible reasons for significant increases and/or decreases in indicators. For instance, greater than normal precipitation during a particular month can often help explain decreases in attendance at outdoor attractions.

Much higher precipitation in July clearly affected visitation at attractions and parks. With over nine inches of rain for the month, July 2013 had the third highest precipitation for any month over the last twenty years in North Carolina. Only September 1999 (Hurricane Floyd) and June 1995 (Hurricane Allison) had more precipitation.

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

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

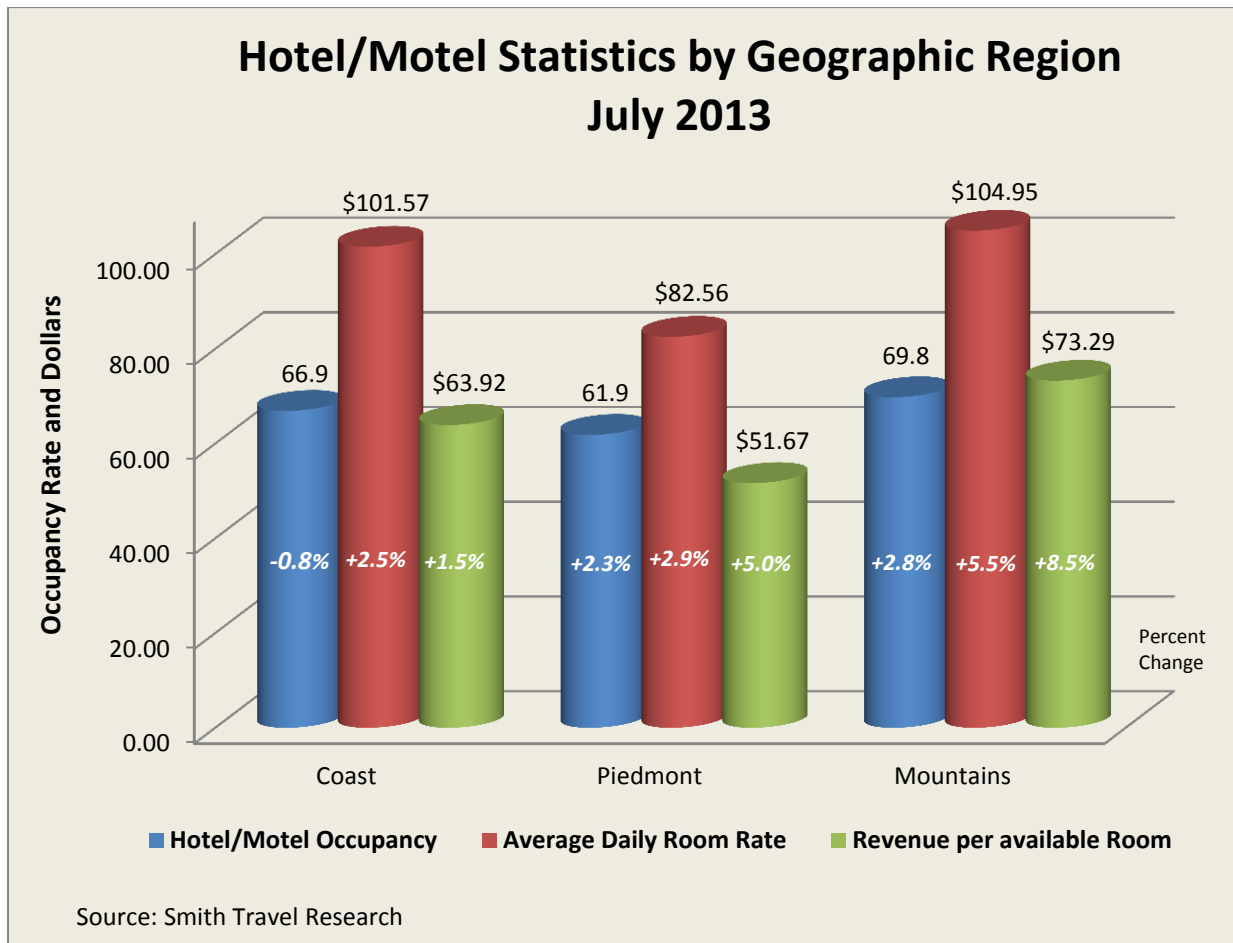


Chart 17 provides a one year comparison in lodging statistics for the three geographic marketing regions of North Carolina in July. Year over year lodging indicators show growth in the Mountain Region outpacing the other two regions, particularly in terms of ADR growth.

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

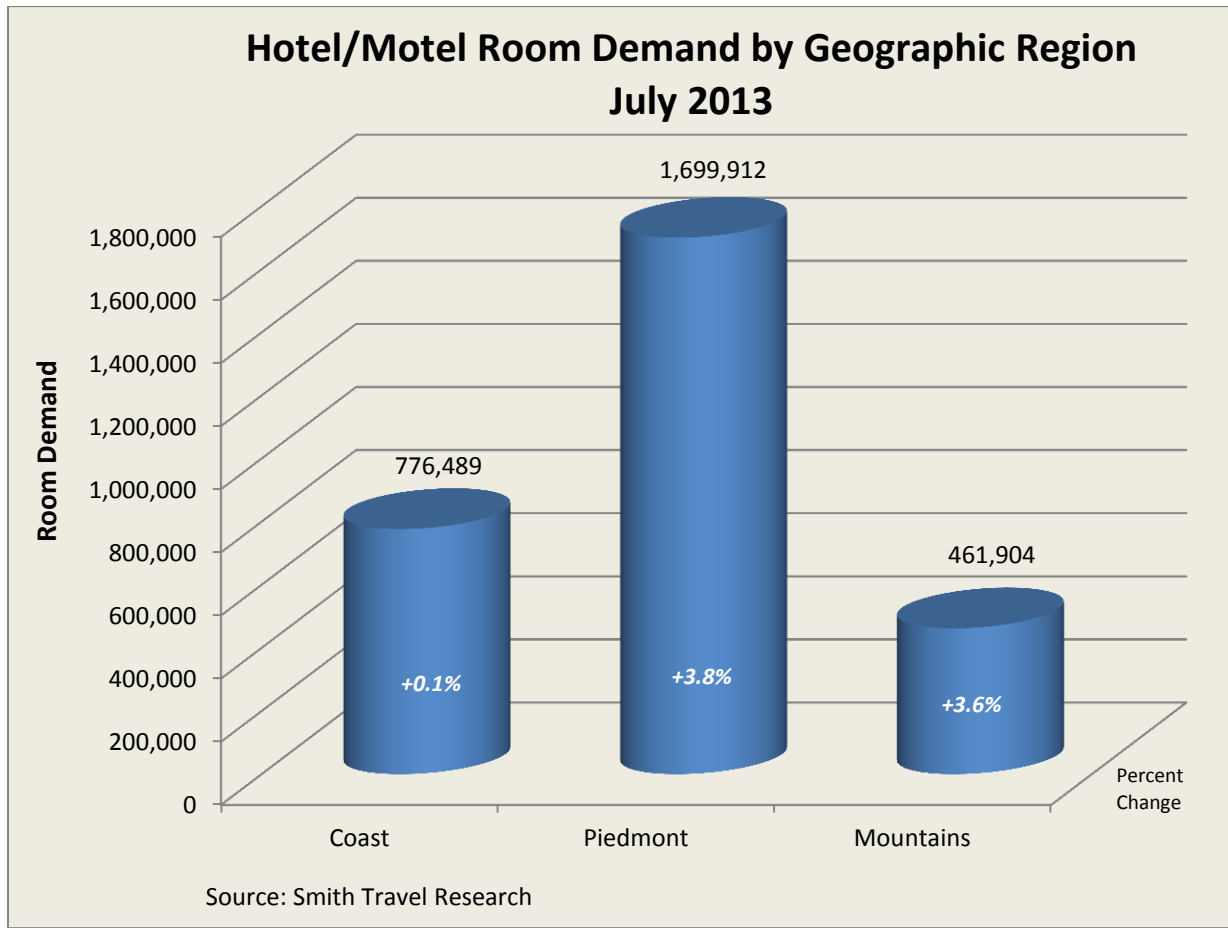


Chart 18 provides hotel/motel demand by geographic region for July 2013. Demand differs from occupancy in that it is the total number of rooms sold, not accounting for differences in room supply. The Piedmont and Mountain regions demand of lodging increased just nearly four percent, while the Coastal Region growth in demand was just over flat.

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

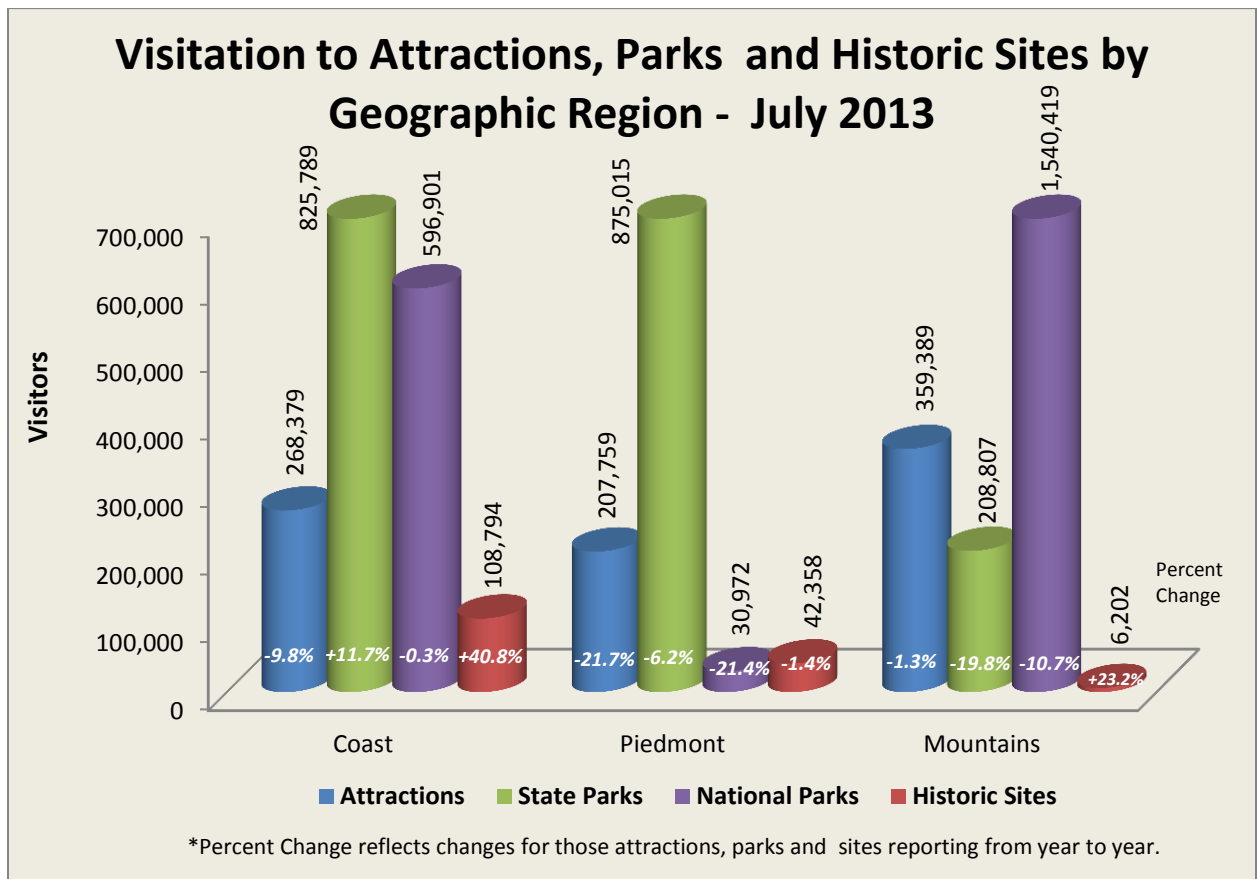


Chart 19 provides a look at the attractions industry in North Carolina in July 2013 by geographic region. As with the statewide numbers, the following data represents only a sample of North Carolina attractions that provide their attendance data, and are not intended to be considered a complete list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

Coastal Region visitation at state parks and historic sites showed growth in July from 2012, while attraction visitation decreased. Historic site visitation grew in the Coastal and Mountain regions, but was fairly flat in the Piedmont Region.

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

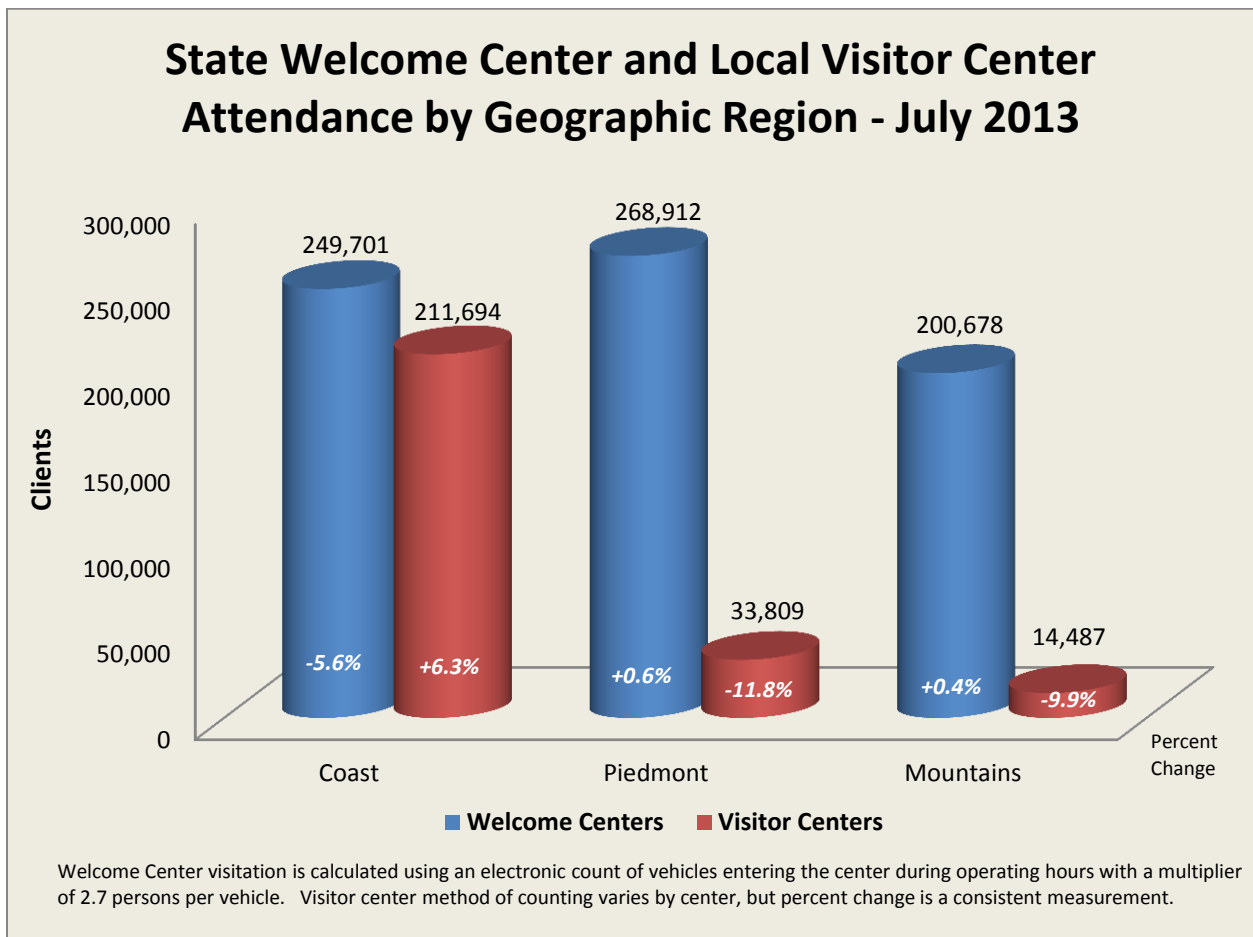


Chart 20 shows welcome center and visitor center attendance by geographic region and offers comparisons from July 2012. Welcome Center visitation was up slightly in the Mountain and Piedmont regions in July, though centers in the Coastal Region saw a five percent decrease. Local center visitation was up in the Coastal Region, but down in the Piedmont and Mountain regions.

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

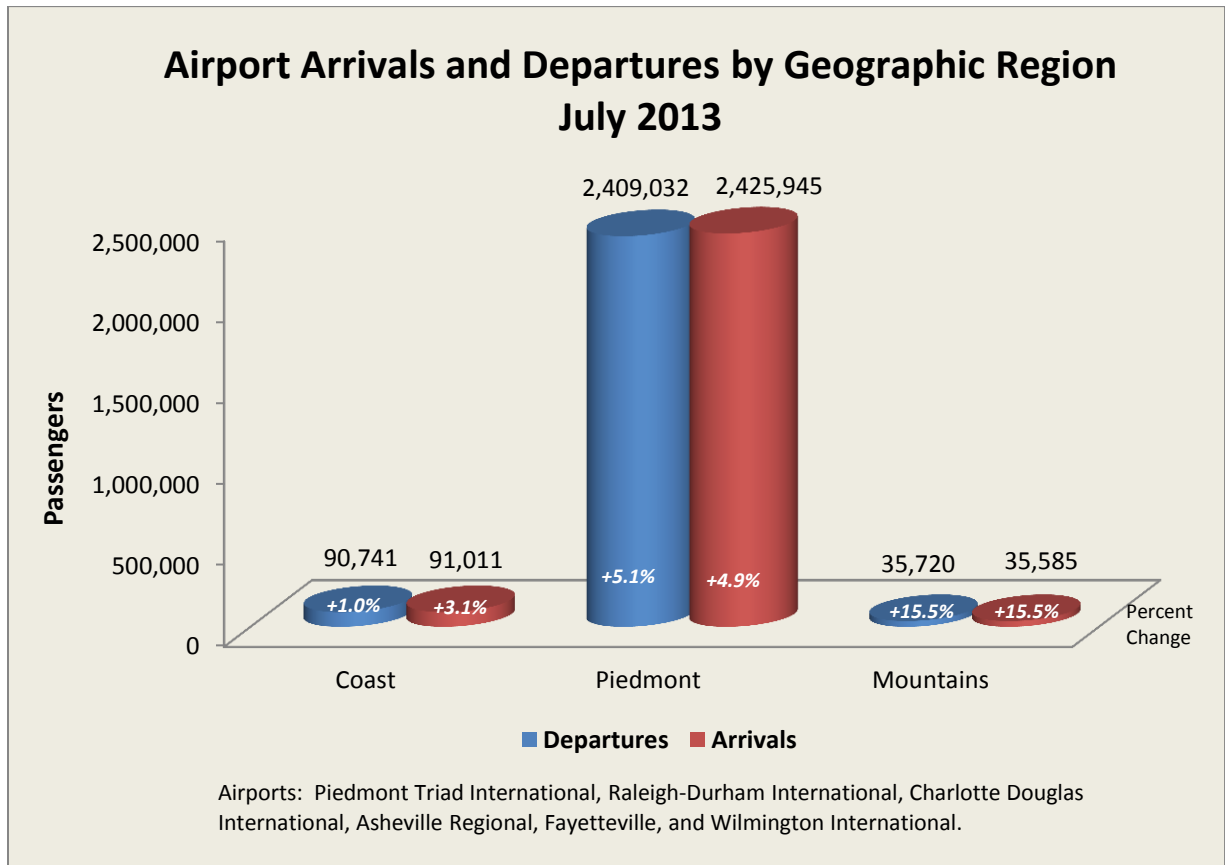


Chart 21 provides a breakdown of air travel statistics by geographic region. While the majority of air traffic is through the Piedmont Region, it is helpful to maintain a trend of other regional airport usage. All three regions showed growth in air traffic in July from 2012, particularly the Mountain Region.

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

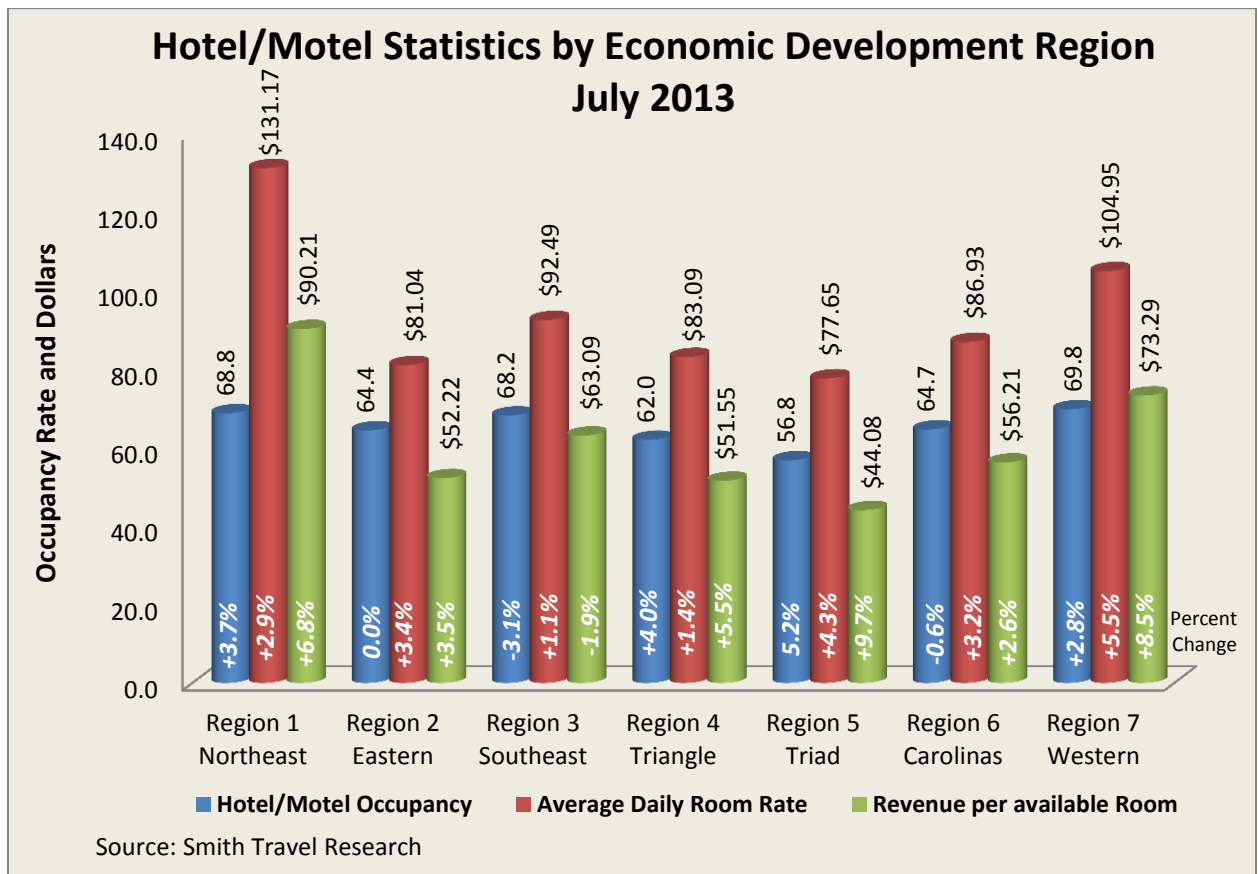


Chart 22 provides lodging indicators for July 2013 by economic development region. Also shown are percent changes from July 2012. This graph allows individual regions within the state to track indicators specific to their general destinations, while still being able to compare their data to the state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

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

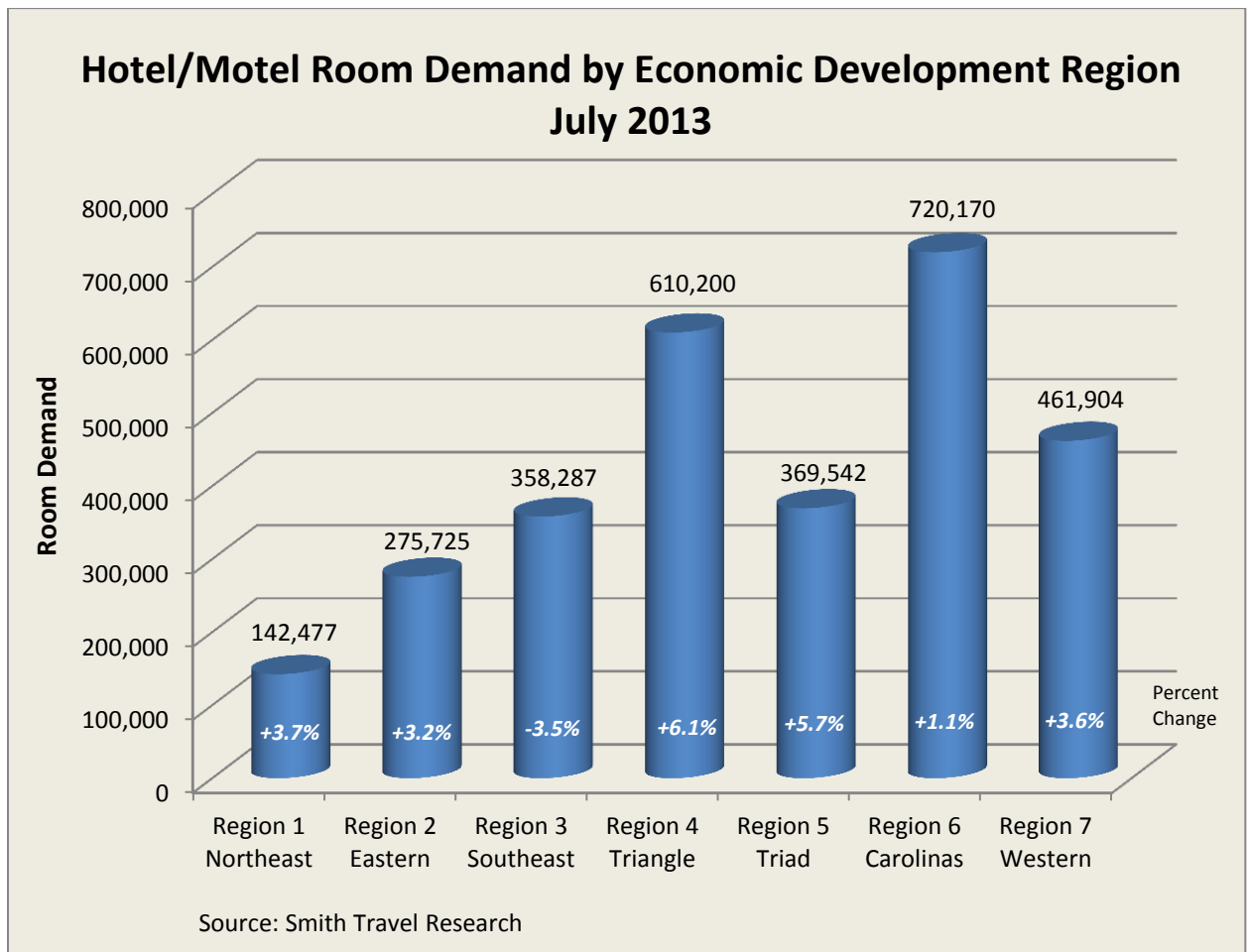


Chart 23 depicts hotel/motel demand for the month of July 2013 by economic development region. Demand is the number of rooms sold excluding complimentary rooms. Six of the seven regions experienced increased demand from July 2012 to 2013, particularly the Triad and Triangle regions.

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 – July 2013

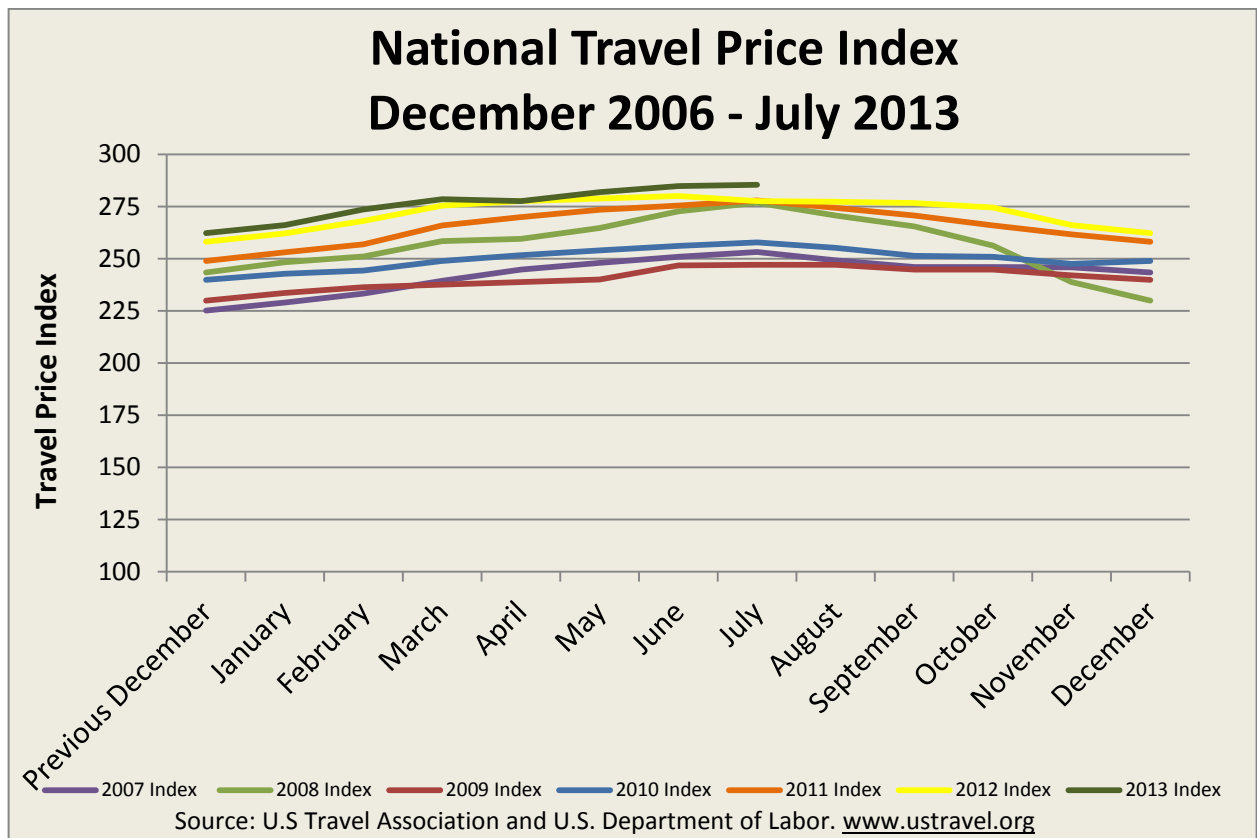


Chart 24 provides a seven year trend of the National Travel Price Index (TPI). Steady growth was experienced through mid-2008; however in November 2008, it is clear that as the TPI fell below 2007 levels, the tourism industry began feeling the full effect of the recession. In December 2010, the TPI finally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

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