traveltracker
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March 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 March 2013

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

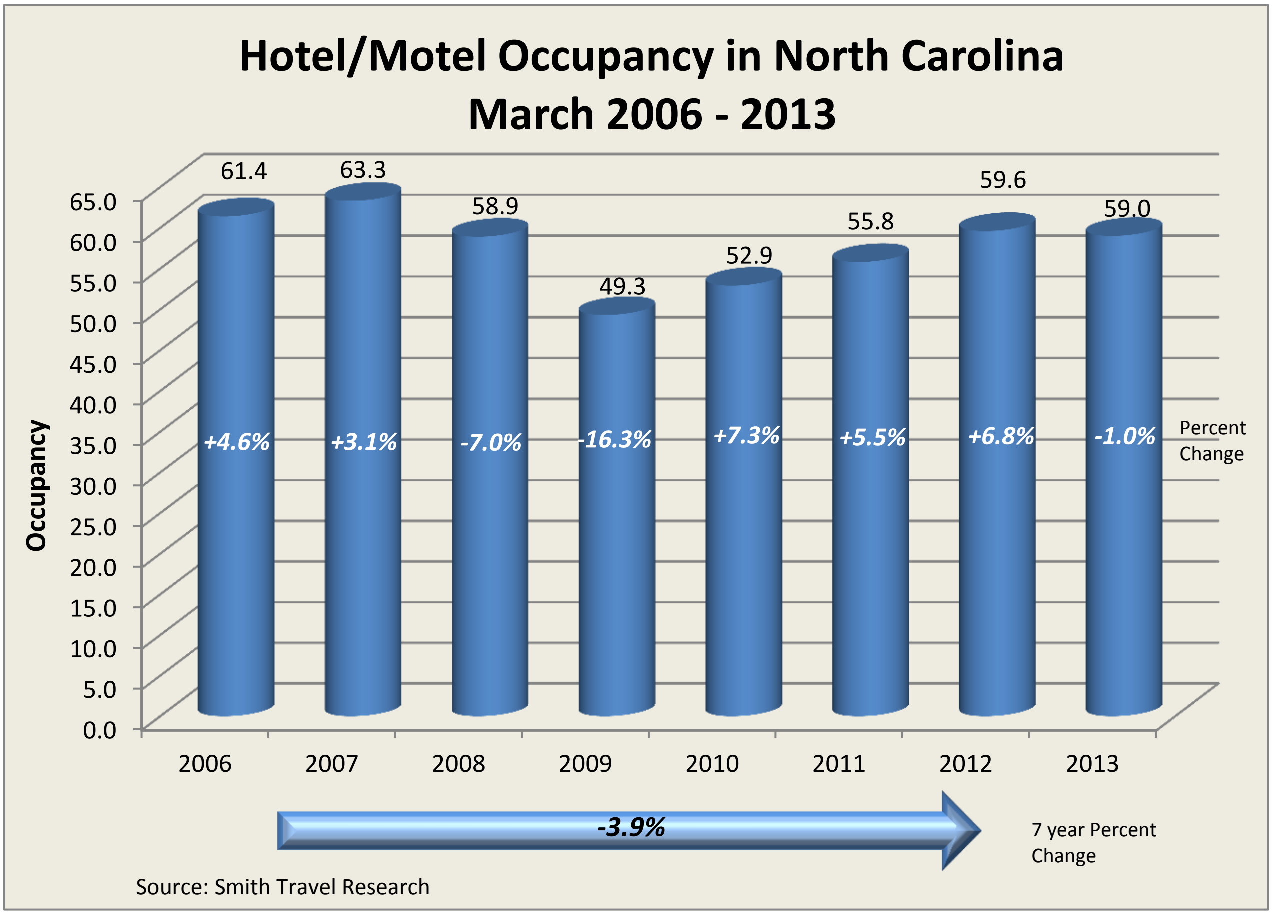


Chart 1 provides a comparison over a seven year period to show the trend of occupancy in the state for the month of March. Occupancy for March 2013 was down one percent from March 2012, the first decrease for March since 2009. *Occupancy at the national level increased by less than one percent (0.4%) in March 2013 from the previous year.*

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

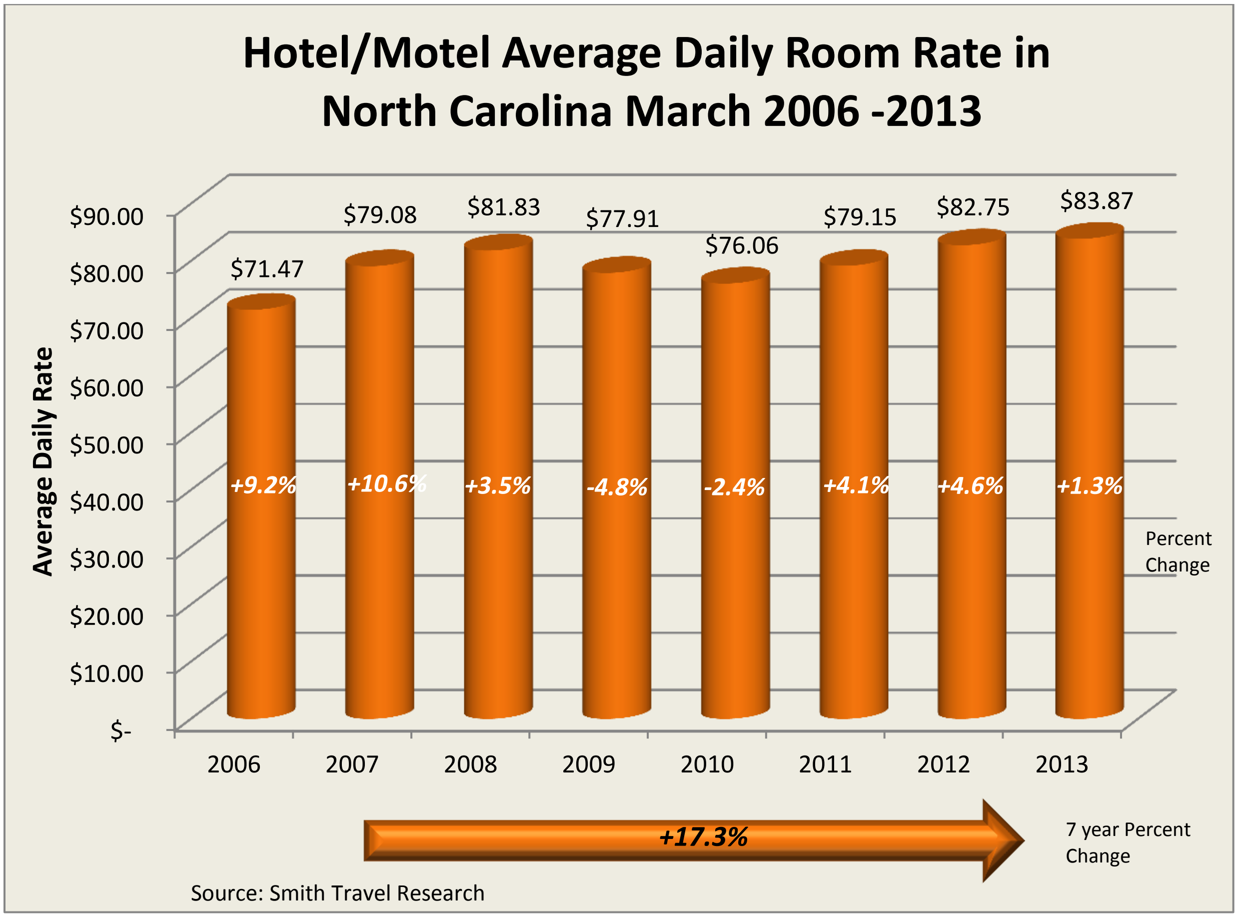
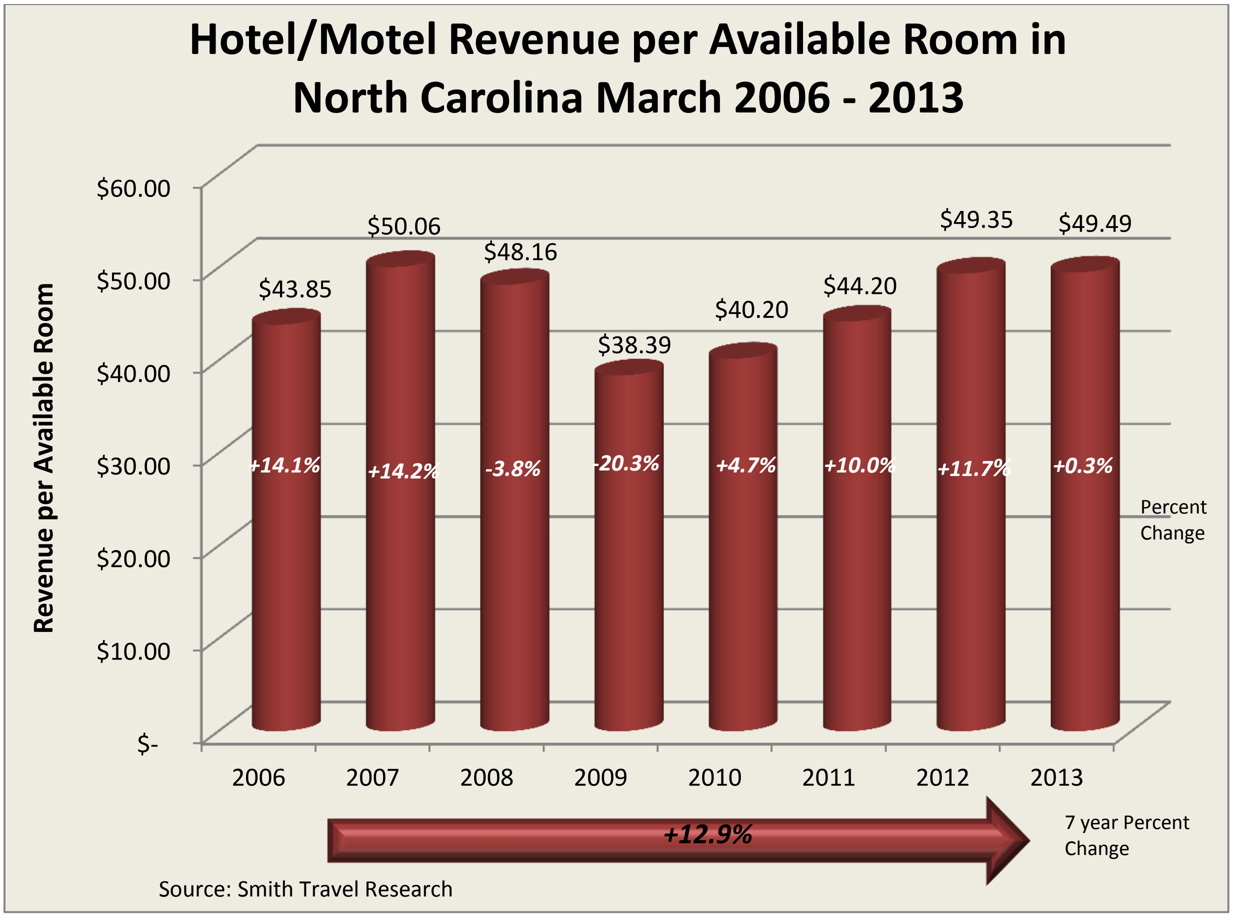


Chart 2 provides a comparison over a seven year period to show the trend of average daily room rate (ADR) in the state for the month of March. ADR increased just over one percent in March, and is up over seventeen percent over the last seven years. The ADR of $83.87 was the highest on record for a March in North Carolina. *ADR at the national level was up 4.2% in March 2013 from the previous March.*

Chart 3 – Hotel/Motel Revenue per Available Room in North Carolina - March 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 seven year period to show the trend of RevPAR in the state for the month of March. RevPAR was just over flat in March 2013. *RevPAR at the national level was up 4.6% in March 2013 from the previous March.*

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

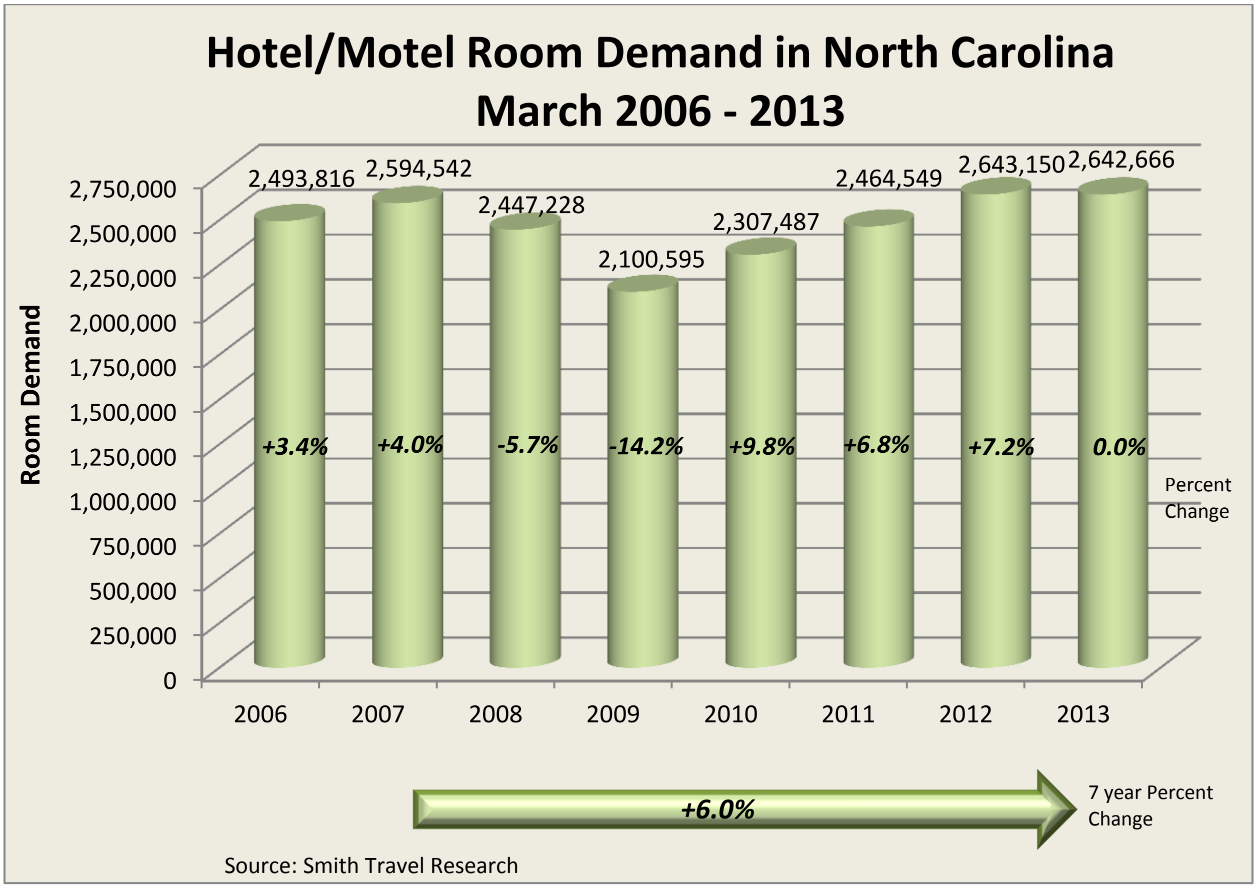


Chart 4 depicts hotel/motel demand for the month of March 2013 with comparisons to the previous seven years. Demand is the number of rooms sold excluding complimentary rooms. Room demand for March was flat from 2012, but still at a record high with over 2.6 million rooms. *Room demand at the national level saw an increase of 1.2% change in March 2013 from the previous March.*

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

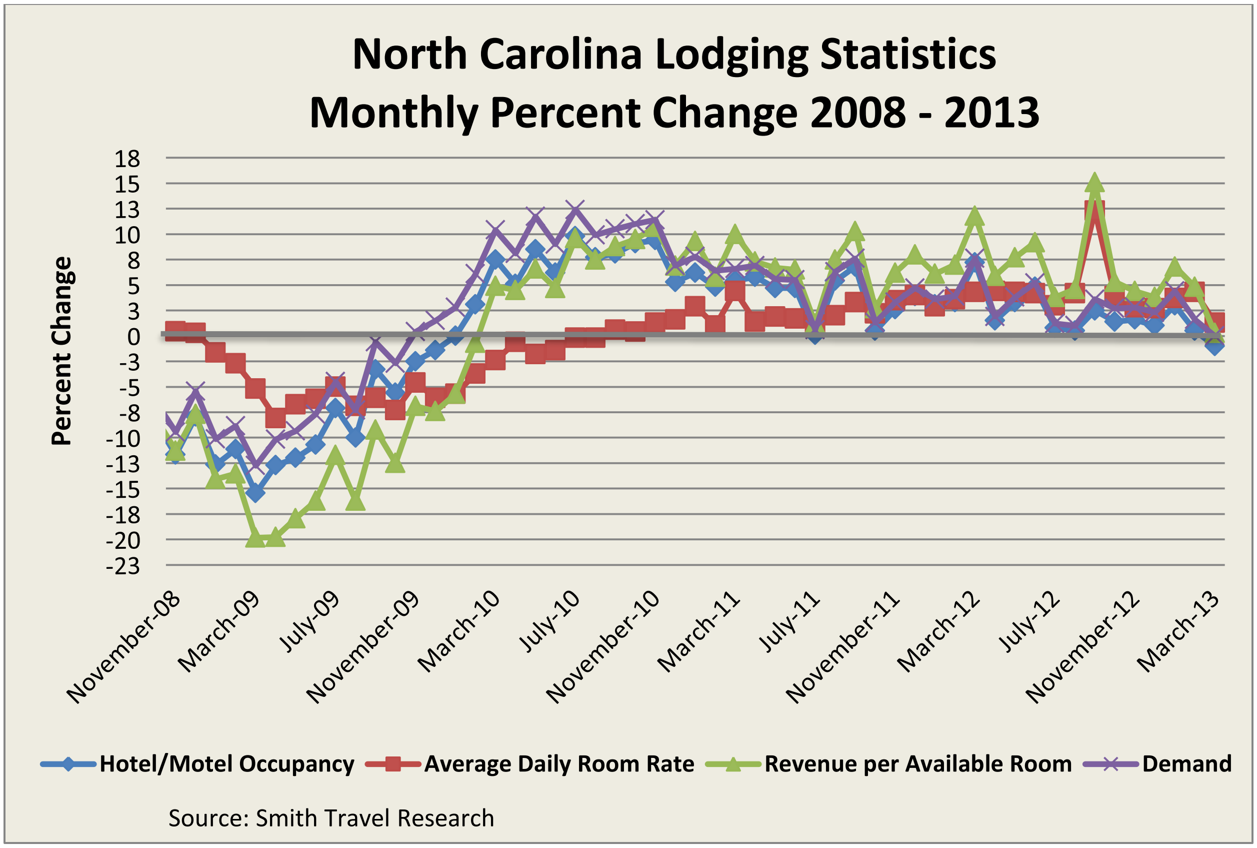


Chart 5 provides a monthly percent change for the four major lodging indicators. The chart allows for a five year trend-line analysis that clearly depicts that the major indicators have shown a steady positive change since early 2010, and while showing some softening, still remains in the positive range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

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

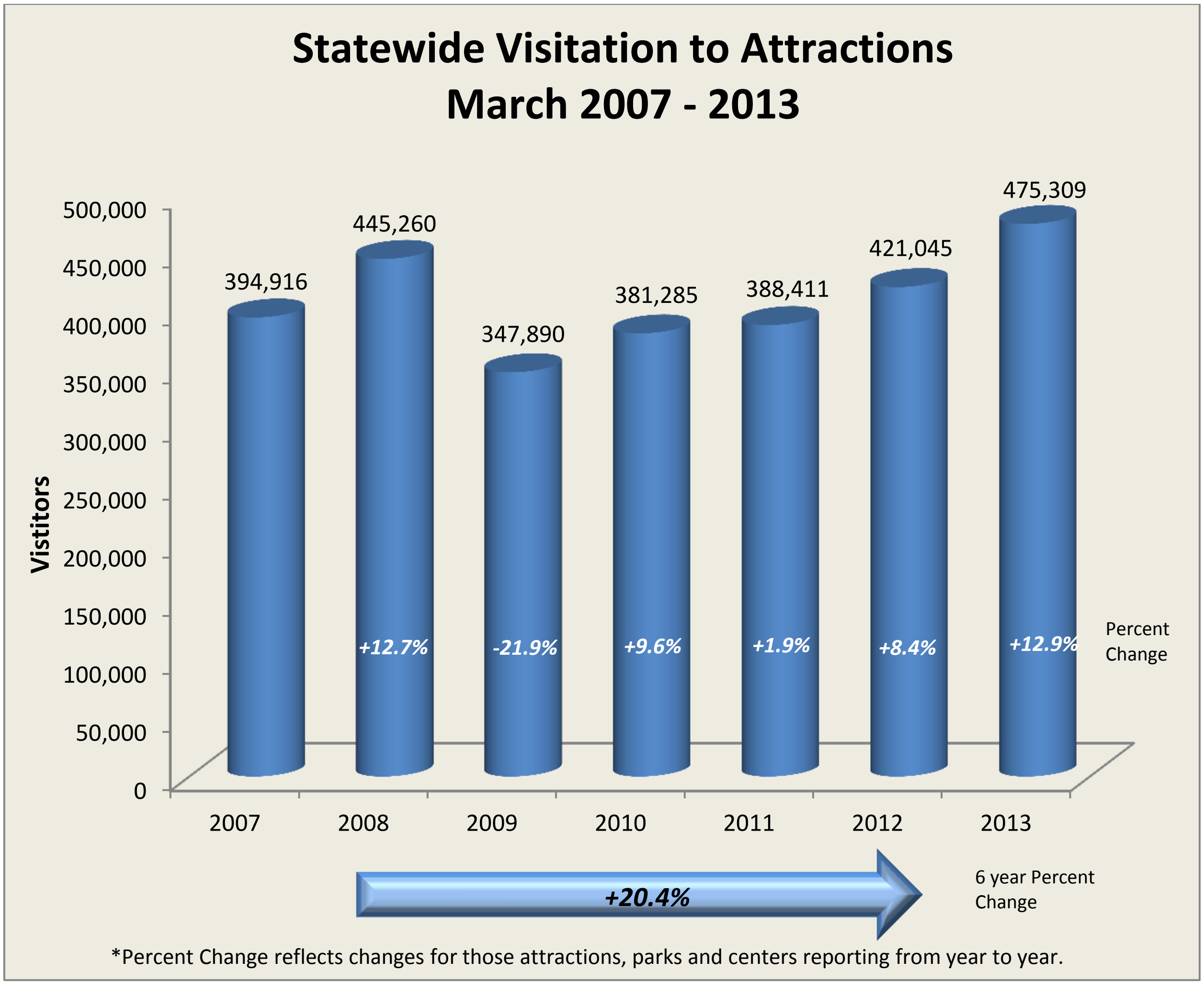


Chart 6 provides a status of the attractions industry in North Carolina for the month of March for the last seven years. The numbers represent only a sample of North Carolina attractions that provide their attendance data, and are not intended to be considered a complete list of attractions. However,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

March attraction attendance was up nearly thirteen percent from 2012, and higher than any of the last seven years. March attraction attendance has increased twenty percent since 2007.

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

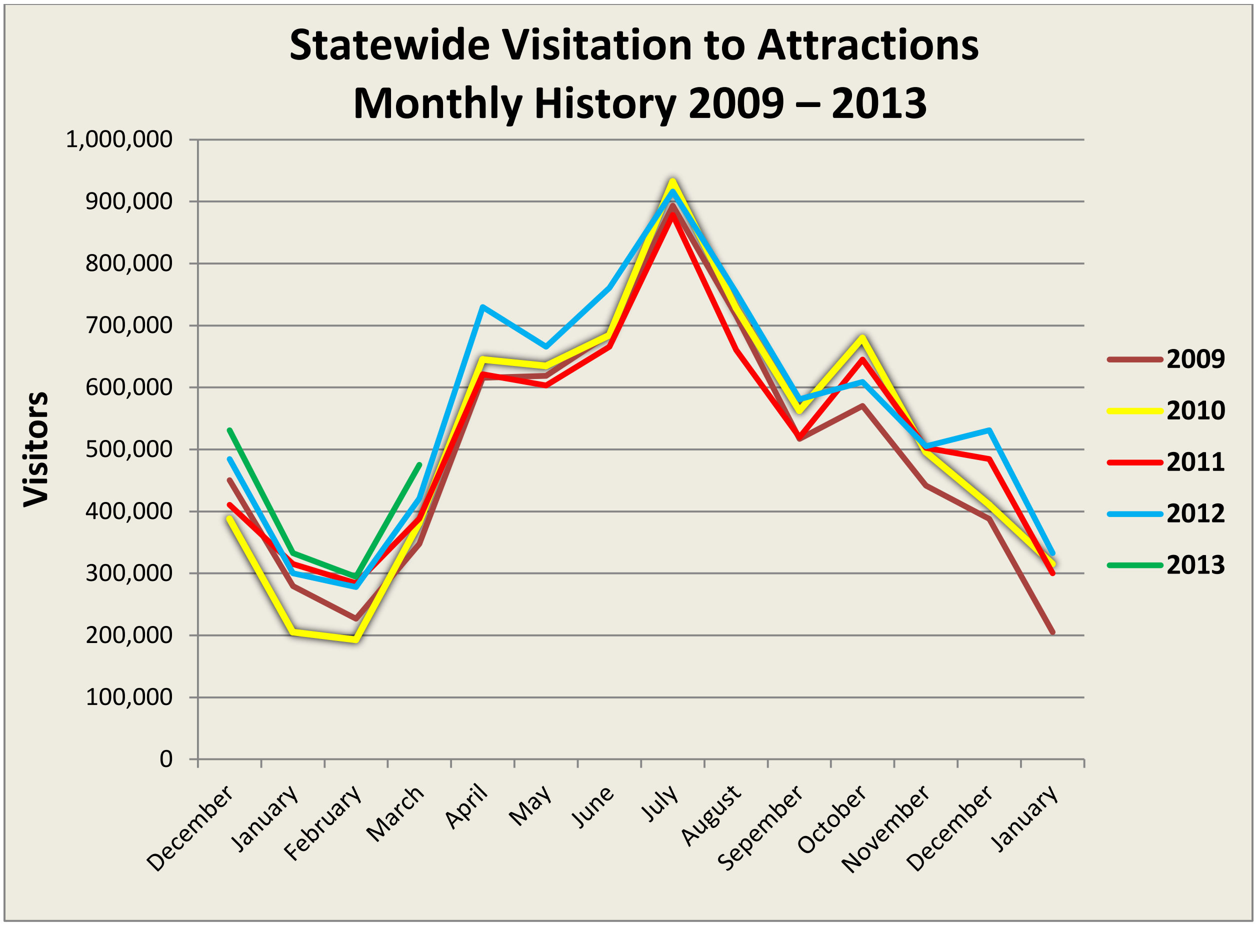


Chart 7 shows a monthly trend of attraction visitation for each of the last five years. This chart allows for a view of the ebb and flow of monthly attraction attendance, while also providing a look at how attendance compares to the same month of the previous years. Not surprisingly, the winter months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

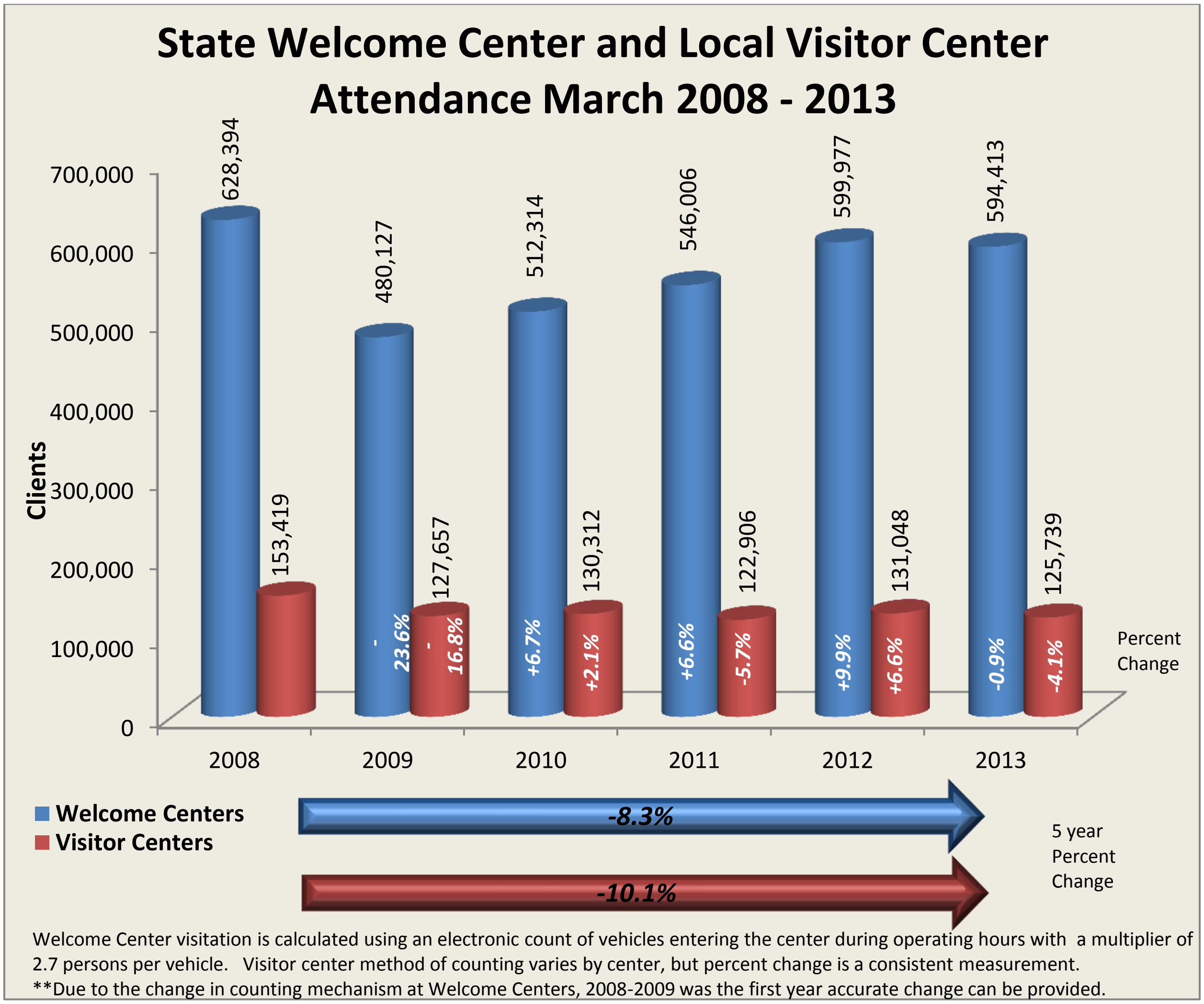


Chart 8 provides March visitation statistics for State Welcome Centers, as well as Local Visitor Centers throughout North Carolina. It should be noted that while there is a percent change indicated for welcome centers for 2007-2008 and 2008-2009, 2008 was the first year a percent change could accurately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

March welcome center visitation was flat statewide from last year, and local visitor center visitation was down about four percent.

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

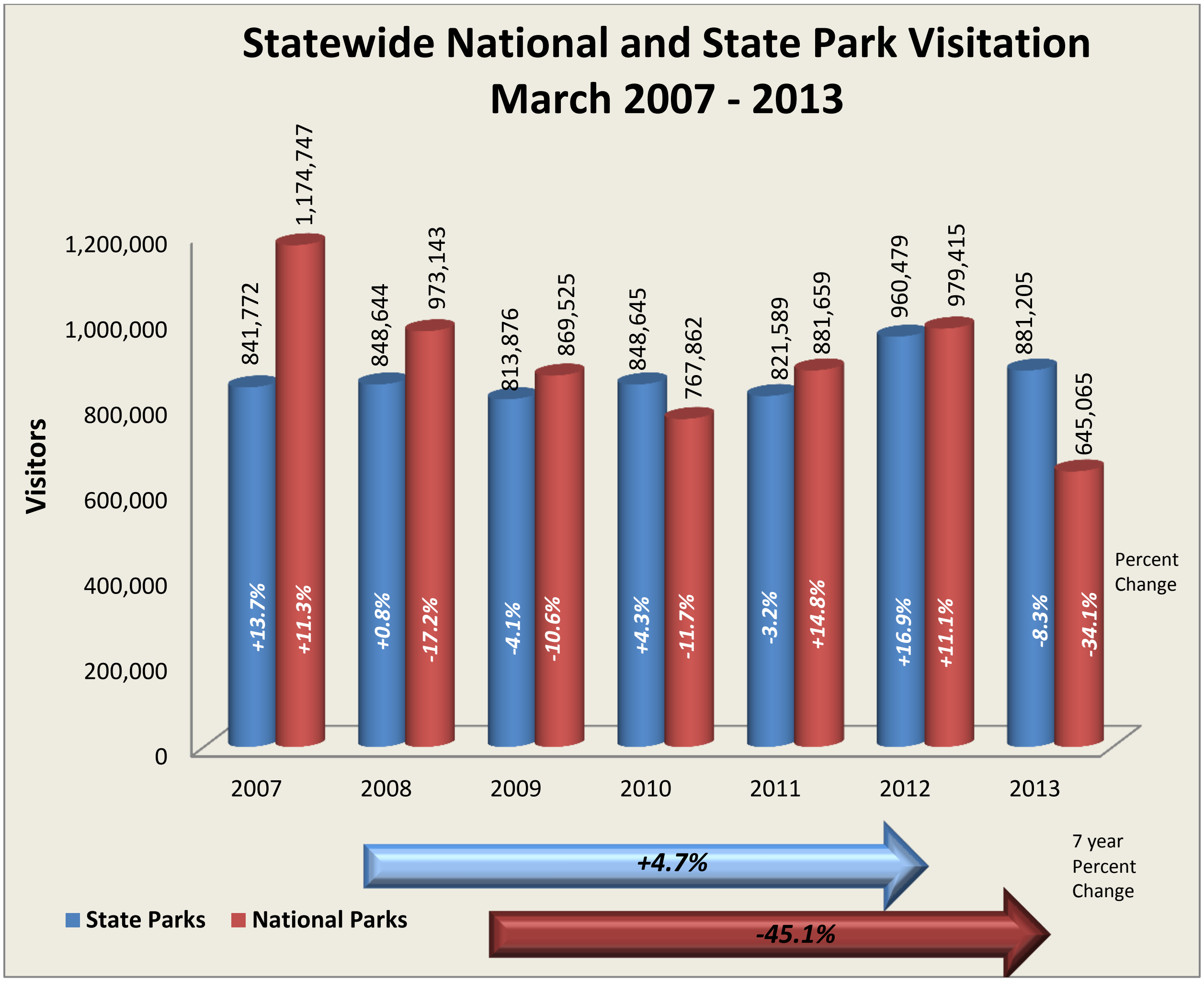
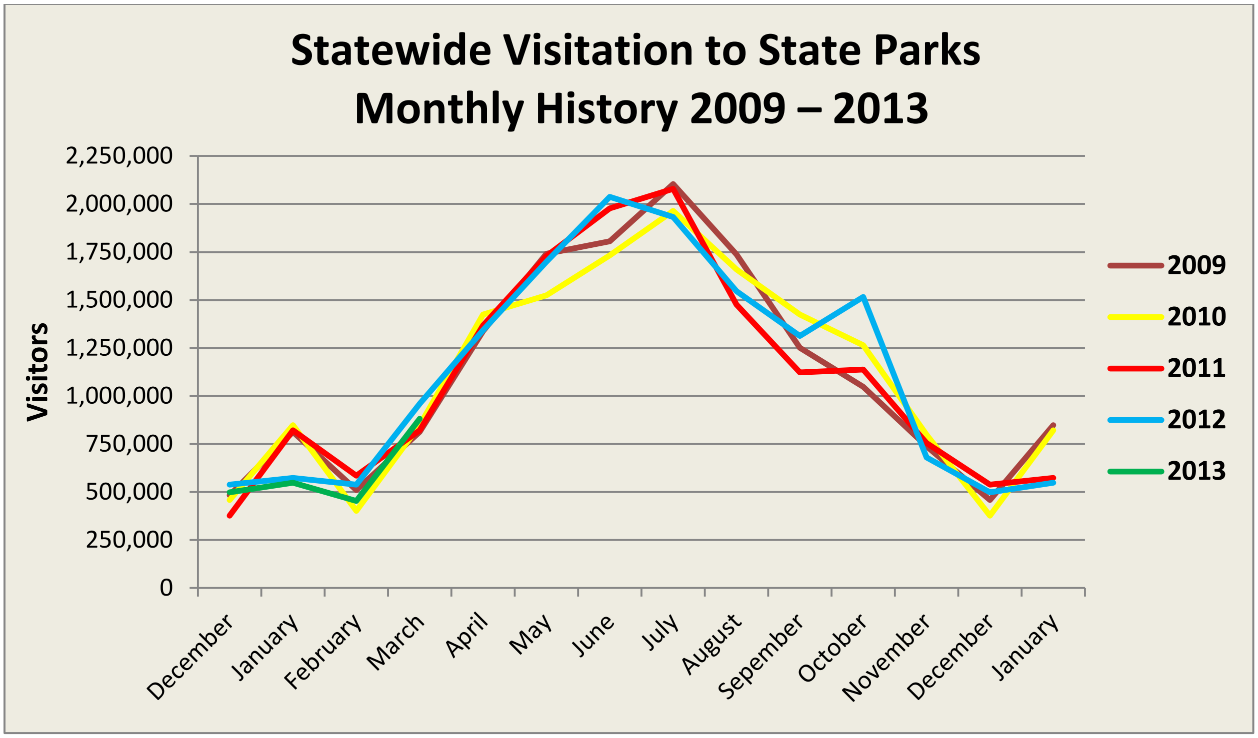


Chart 9 depicts visitation to state and national parks in North Carolina for the last seven years months of March. While both national and state park visitation was down for the month from last year, visitation to state parks is up nearly five percent over the last six years. Note later in this report that the weather in March may have attributed to the decrease in park visitation for the month. Temperatures were the lowest in March in at least 7 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

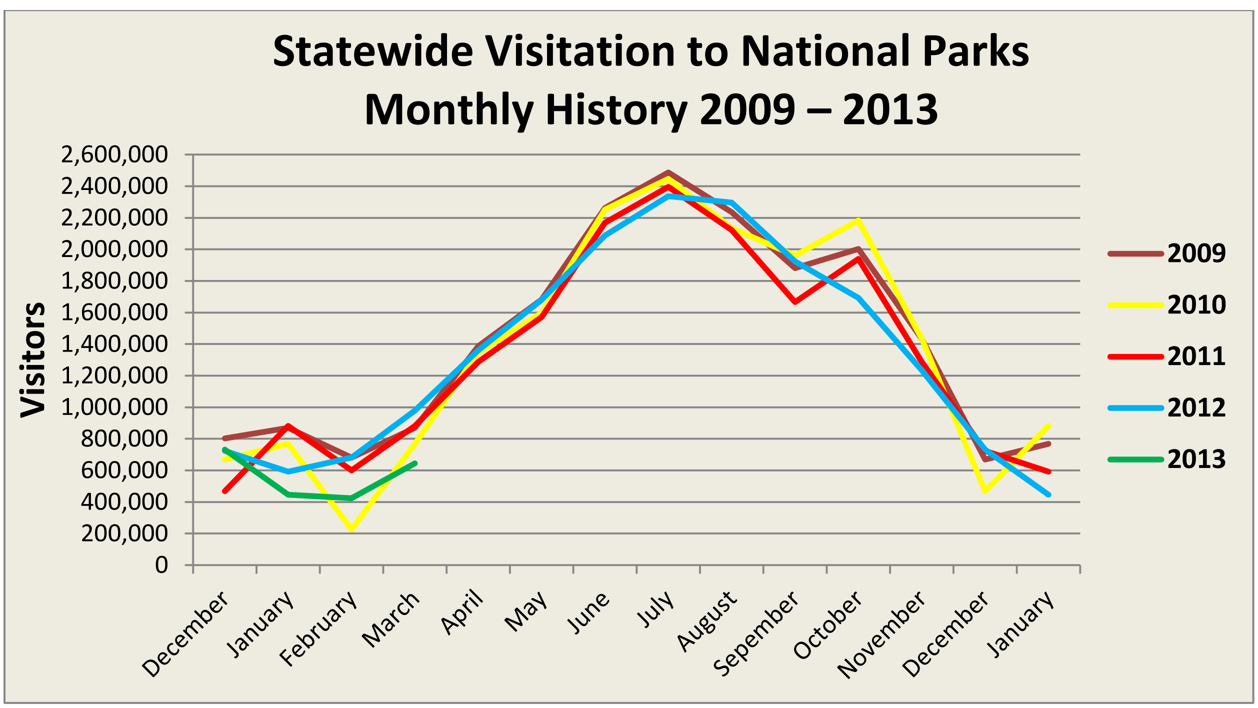


Chart 12 – Statewide Historic Sites Visitation - March 2009 – 2013

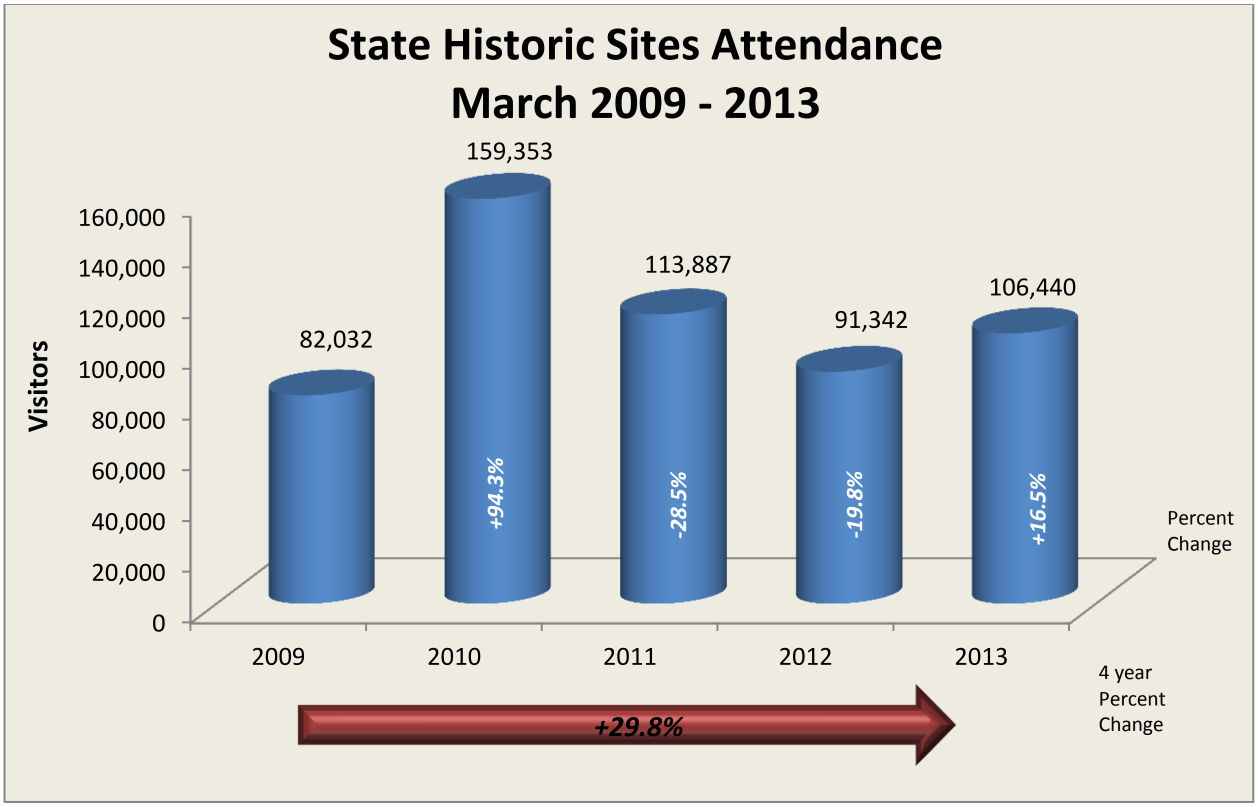


Chart 12 depicts visitation to State Historic Sites in North Carolina for the last five years of March. As this report has just begun tracking historic site visitation, more data is needed to determine the trend, however, March 2013 showed a positive increase in statewide historic site visitation.

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

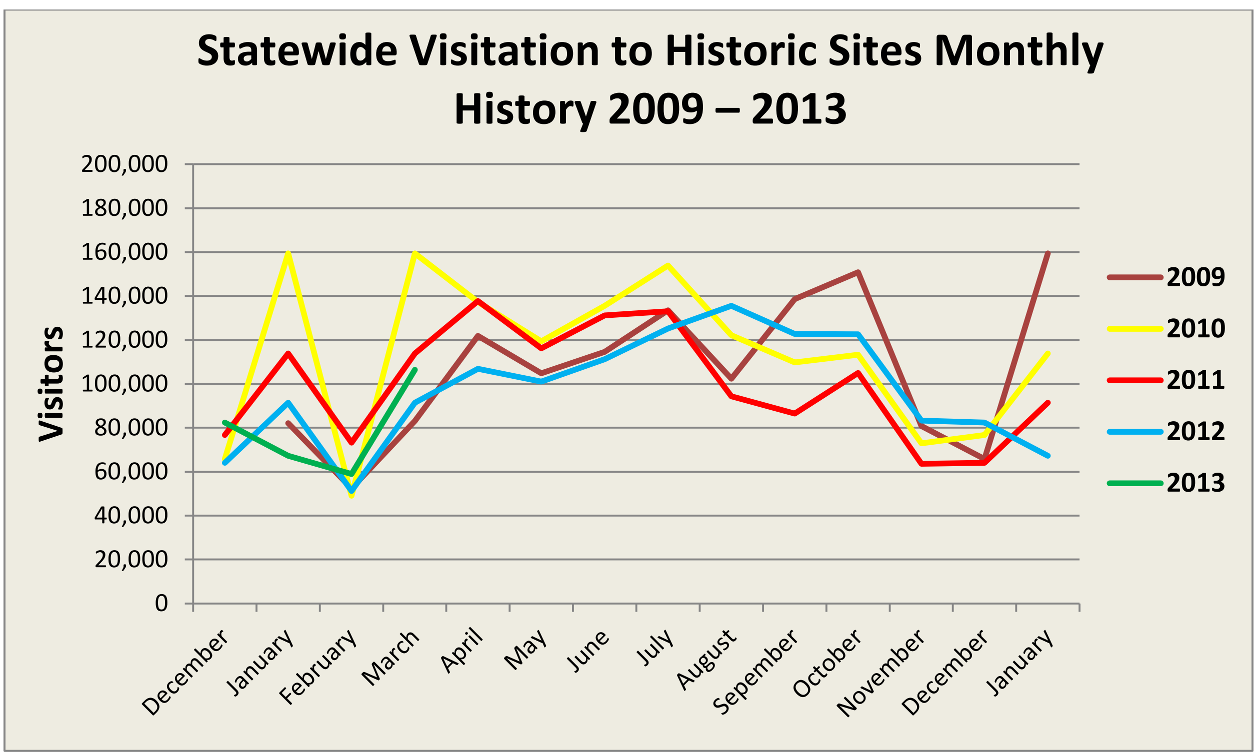


Chart 14 – Statewide Airport Arrivals and Departures - March 2007 – 2013

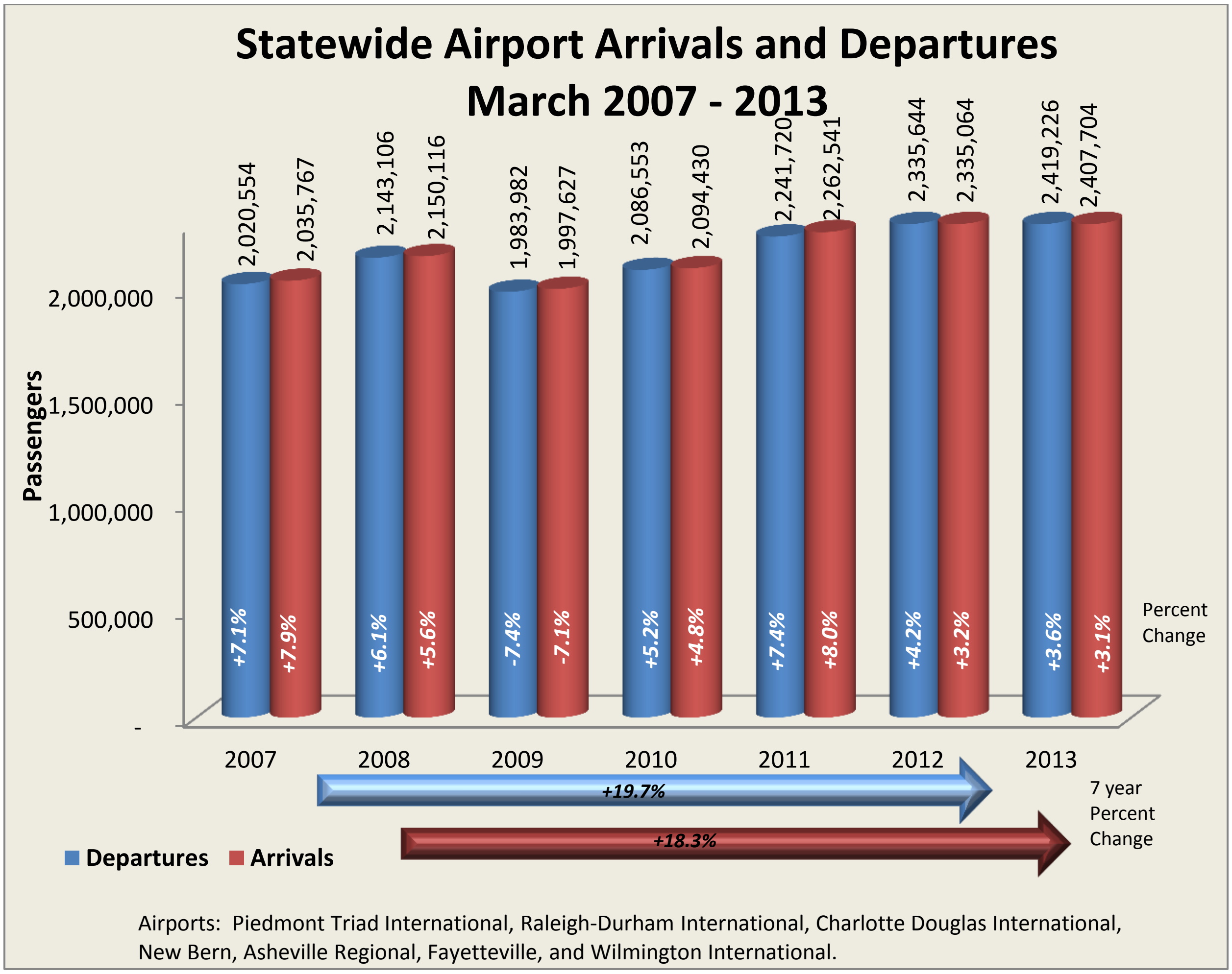


Chart 14 shows March airport arrivals and departures for each of the previous seven years. Both arrivals and departures were up about three percent in March 2013 from 2012 and there has been a substantial six-year increase in both for the month of March.

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

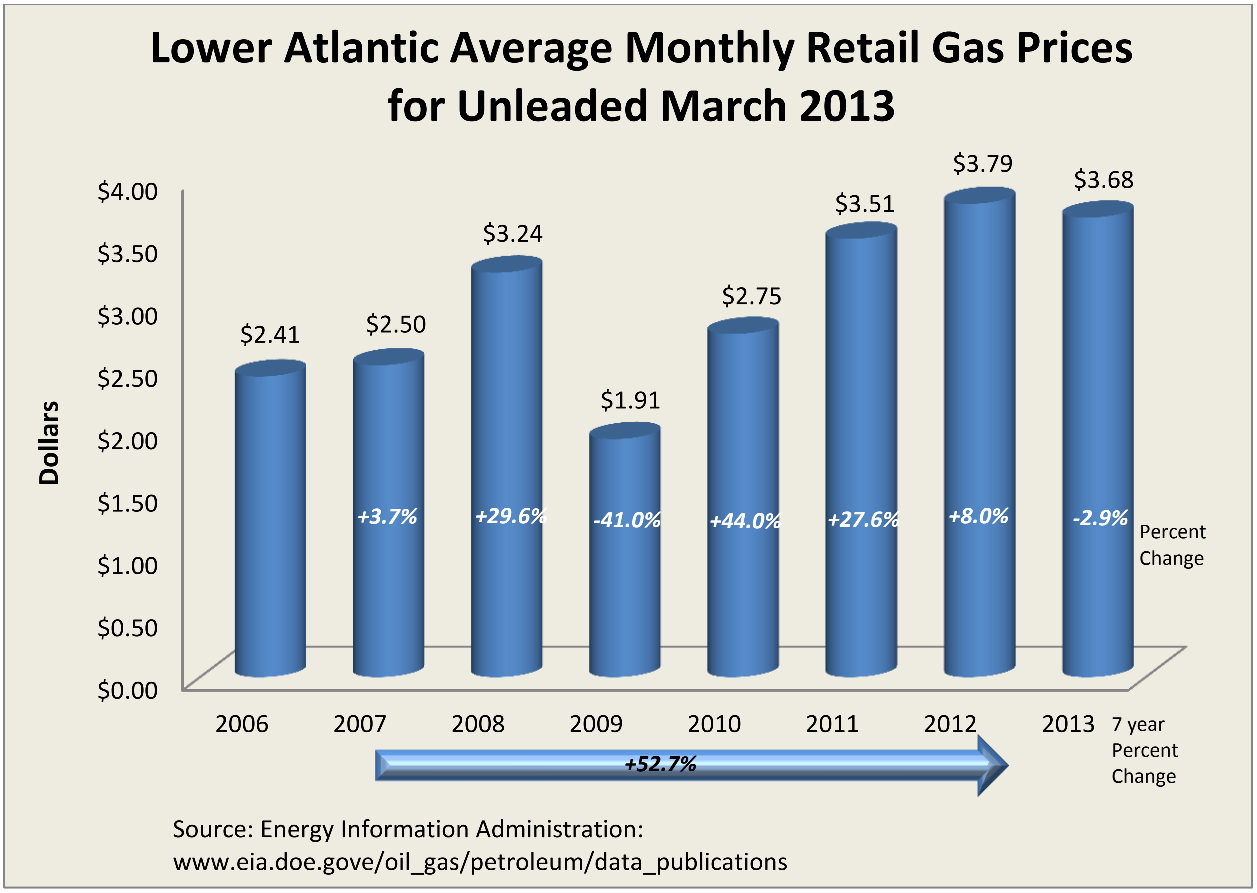


Chart 15 provides the average price per gallon of unleaded gasoline for March 2013 and the same month from the seven previous years. The data provided above, when compared with other indicators such as attraction attendance and visitor spending data, can be very helpful in the analysis of general travel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

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

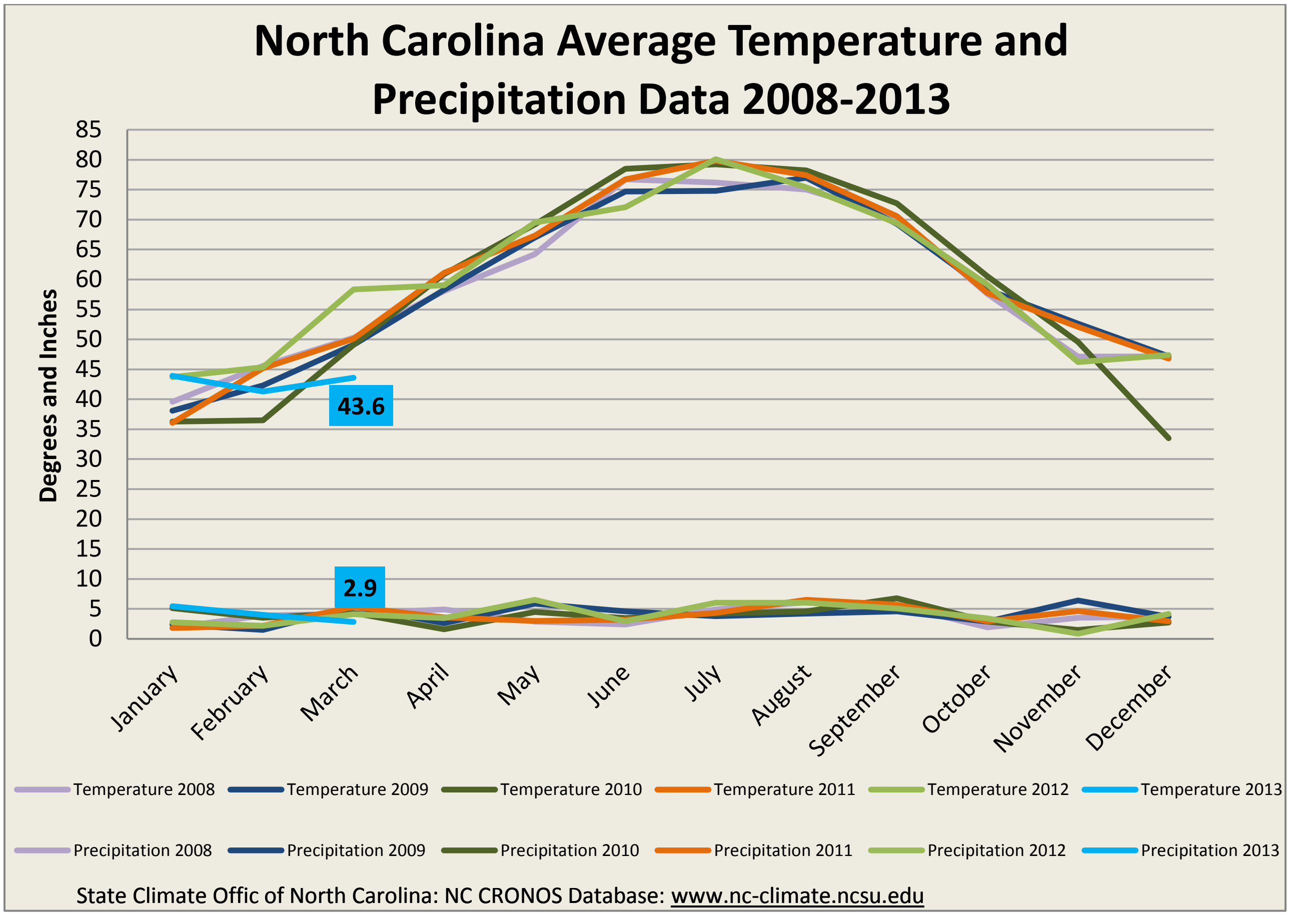


Chart 16 provides 48 months of air temperature and precipitation. This data, when analyzed together with gas price data and other tourism indicators, can be valuable in determining possible reasons for significant increases and/or decreases in indicators. For instance, greater than normal precipitation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

The average temperature in March was the lowest in six years, affecting attendance at outdoor attractions and parks. Precipitation for the month was less than in previous years, with less than 3 inches for the month.

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

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

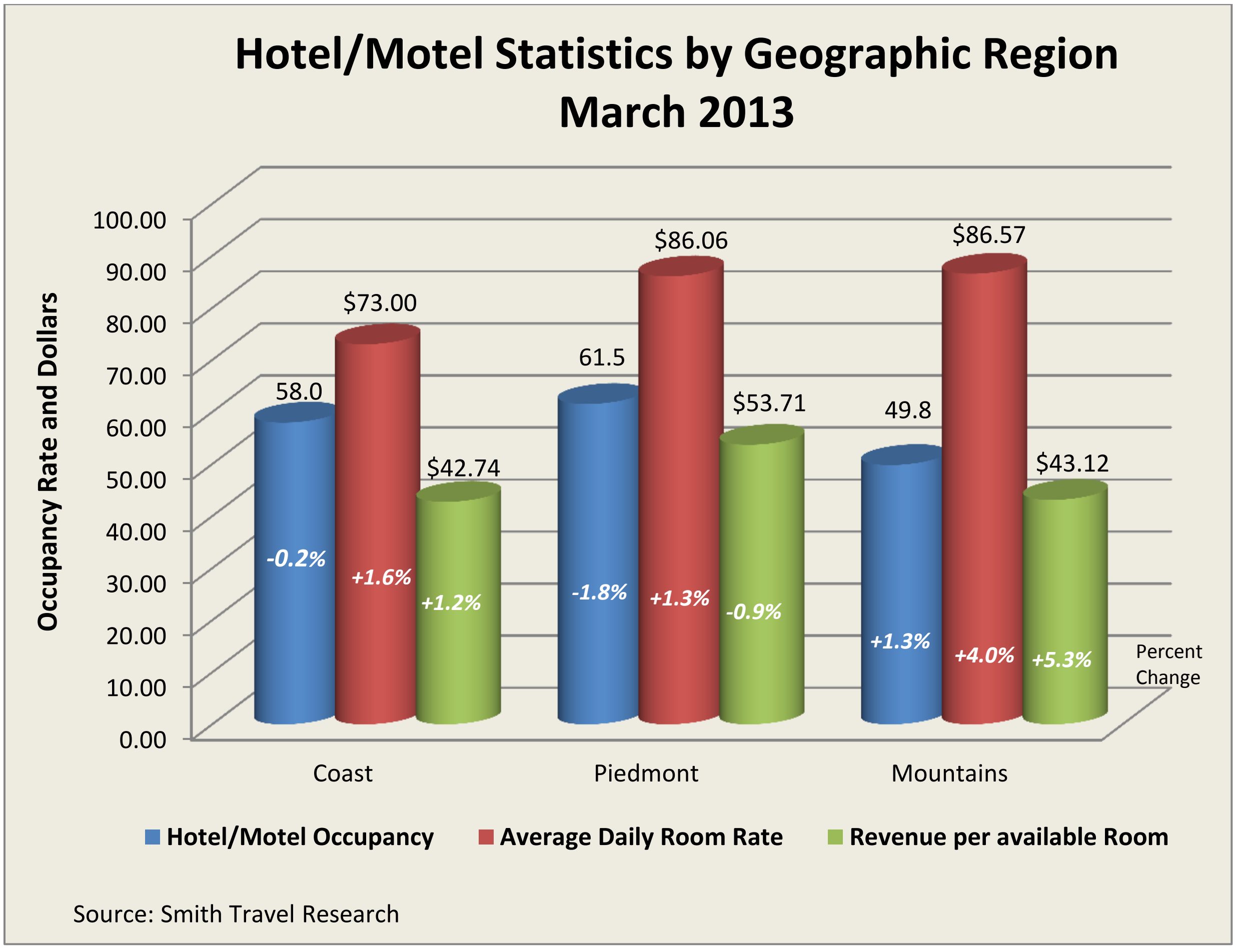


Chart 17 provides a one year comparison in lodging statistics for the three geographic marketing regions of North Carolina in March. Lodging indicators statewide were not as positive in March as previous months, however the Mountain Region ADR continues to climb and was up four percent from 2012, and the region's RevPAR was up nearly over five percent from last March.

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

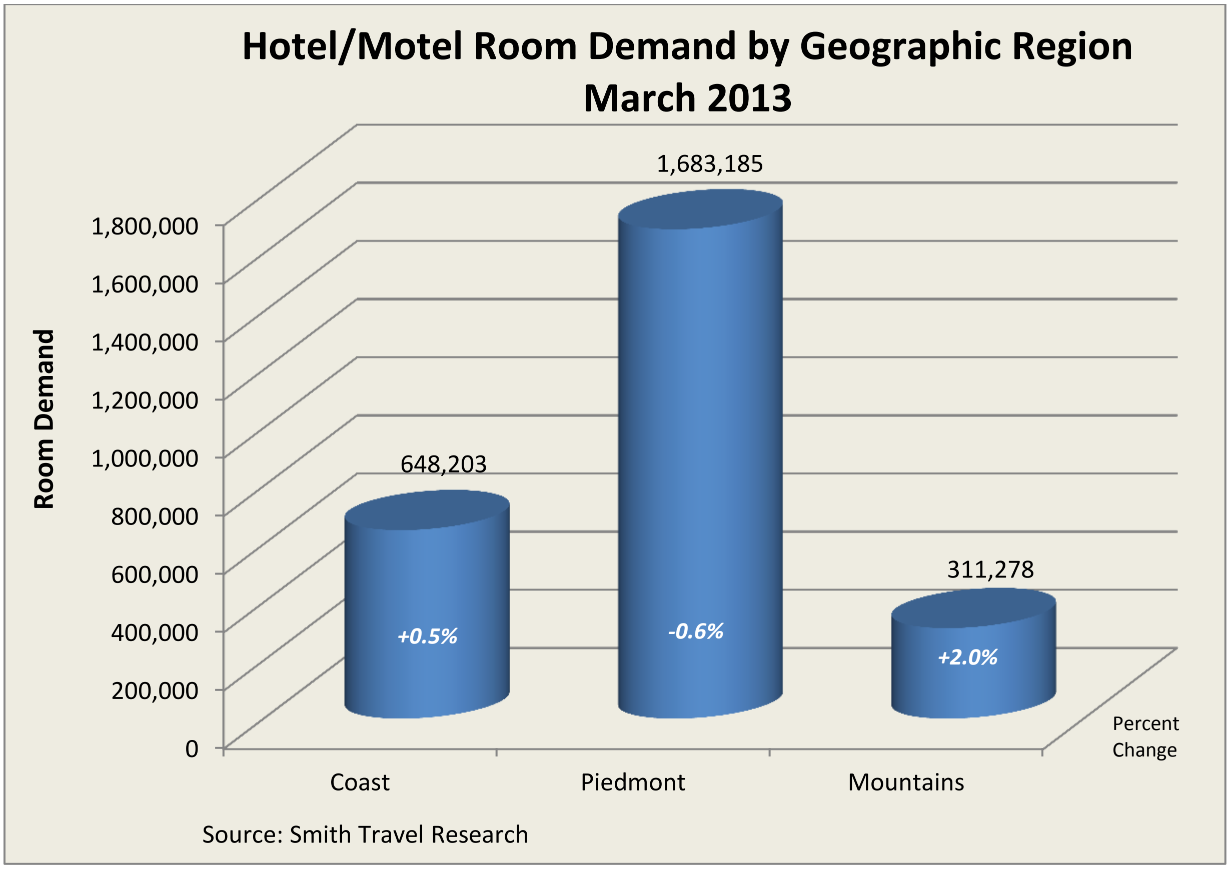


Chart 18 provides hotel/motel demand by geographic region for March 2013. Demand differs from occupancy in that it is the total number of rooms sold, not accounting for differences in room supply. While the Piedmont Region had a slight decline in demand in March from March 2012, the Coastal and Mountain regions had positive increases.

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

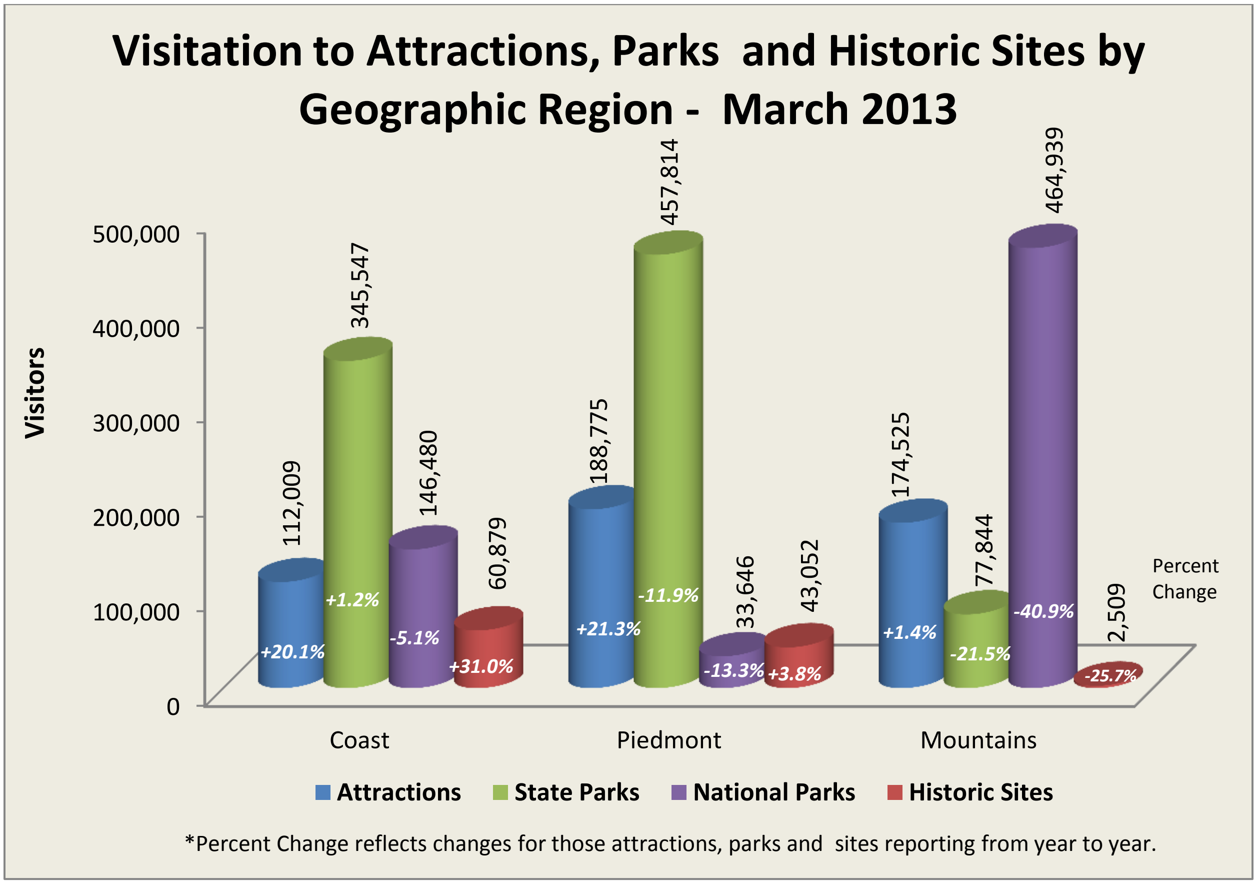


Chart 19 provides a look at the attractions industry in North Carolina in March 2013 by geographic region. As with the statewide numbers, the following data represents only a sample of North Carolina attractions that provide their attendance data, and are not intended to be considered a complete list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

March attendance growth for attractions and parks varied by region. While attraction attendance increased in each region, park visitation was down, with the exception of the Coastal Region. Historic site attendance was up dramatically in the Coastal Region, but down the Mountain Region.

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

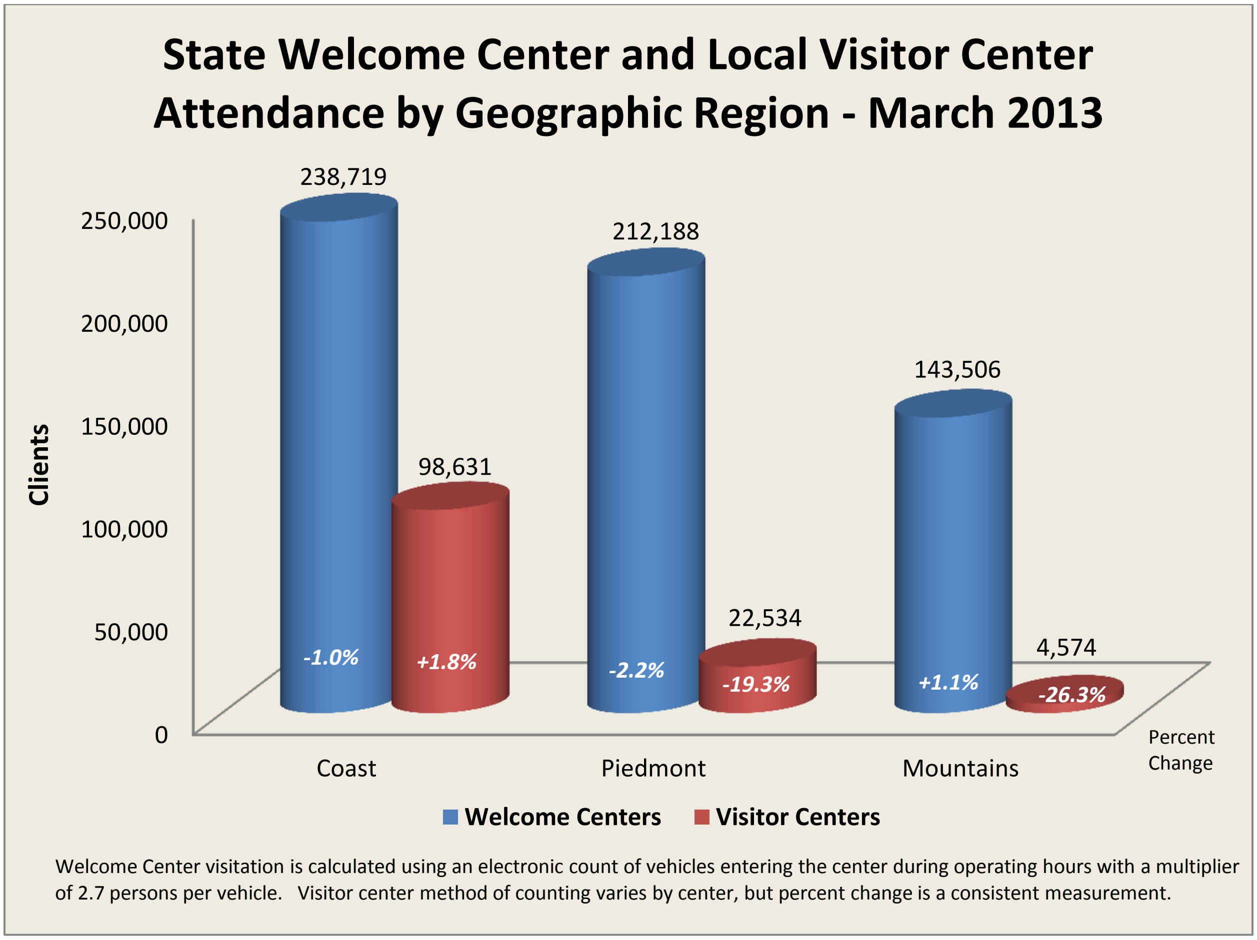


Chart 20 shows welcome center and visitor center attendance by geographic region and offers comparisons from March 2012. Welcome Center visitation was down slightly in the Coastal and Piedmont regions, and up slightly in the Mountain Region. Local visitor center welcomed few visitors in the Piedmont and Mountain regions, while visitation increased in the Coastal Region.

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

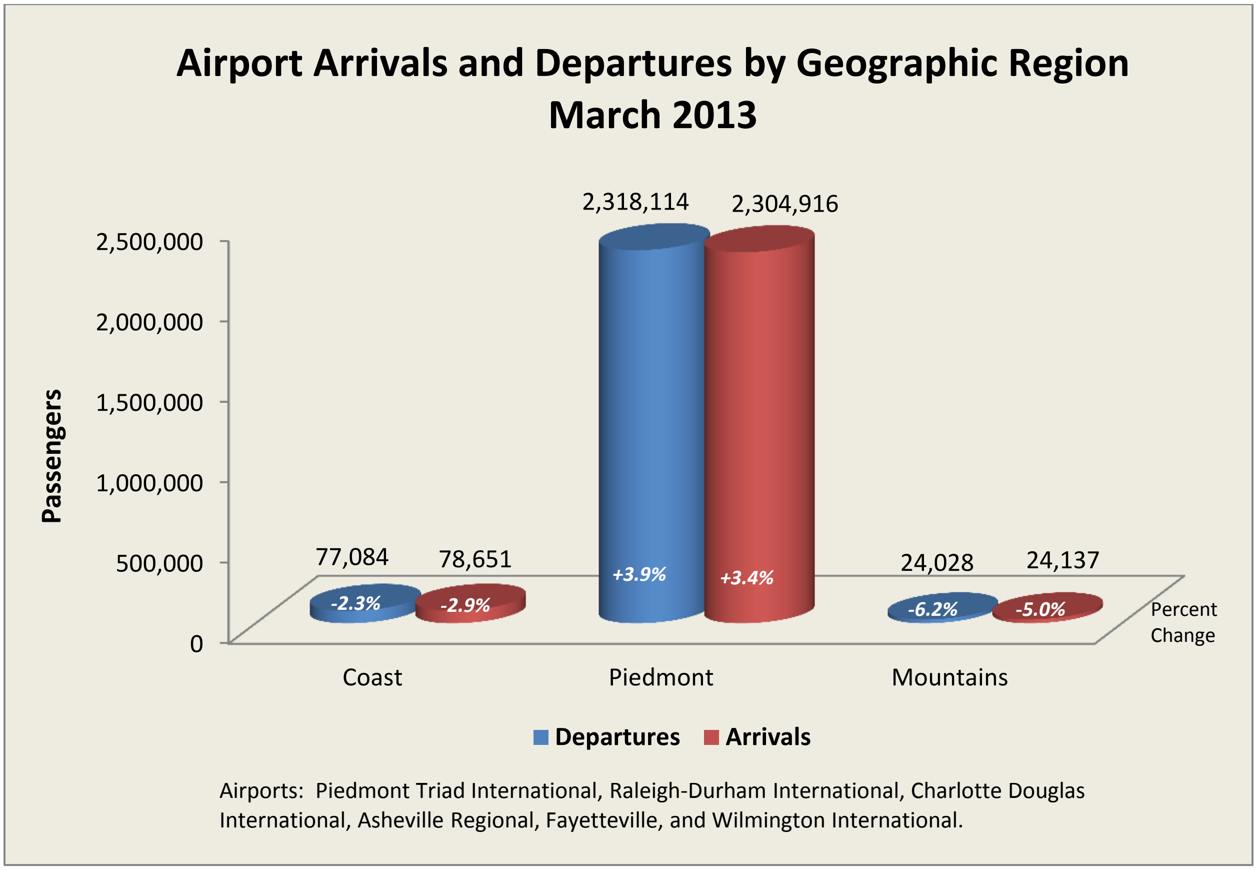


Chart 21 provides a breakdown of air travel statistics by geographic region. While the majority of air traffic is through the Piedmont Region, it is helpful to maintain a trend of other regional airport usage. The Coastal and Mountain regions showed decreases in arrivals and departures from March 2012 to 2013, while the Piedmont Region was up nearly four percent.

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

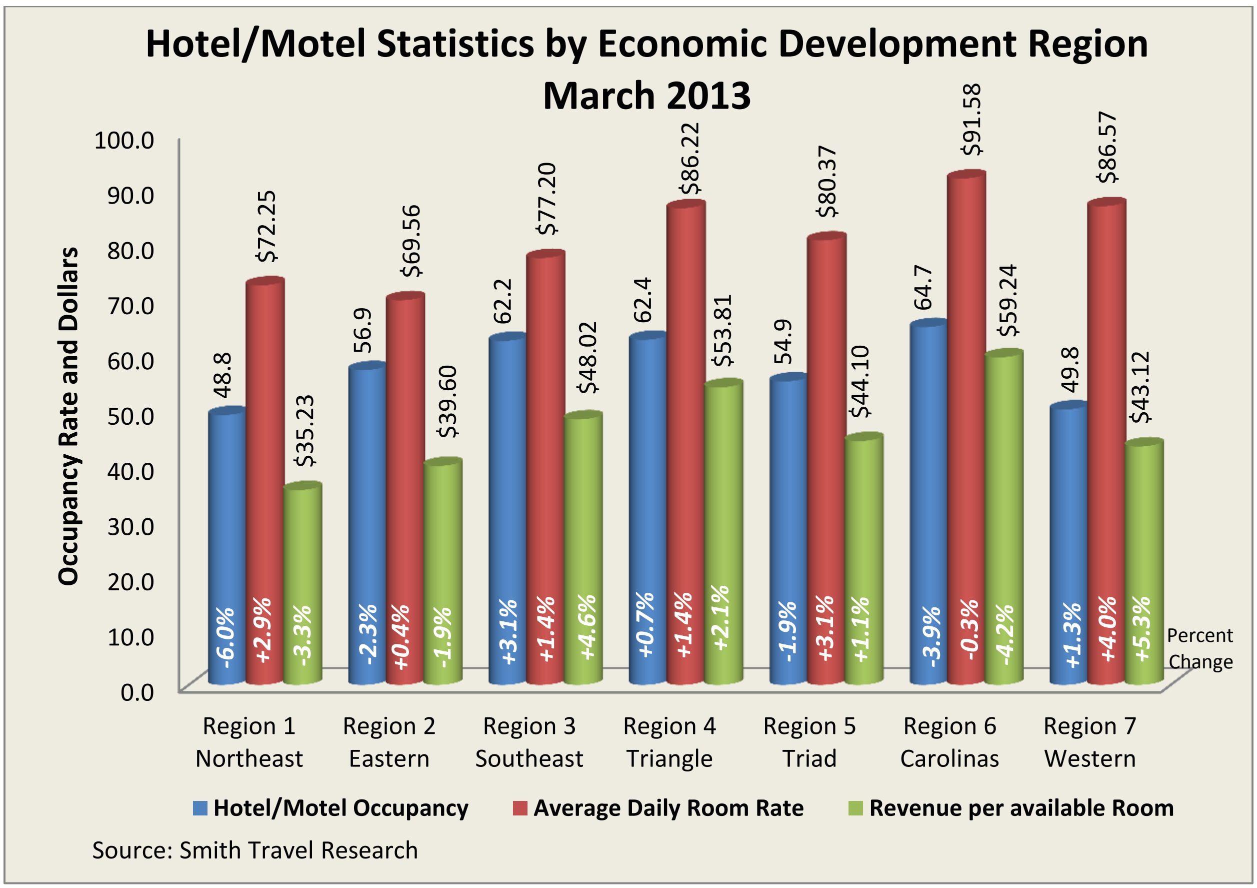


Chart 22 provides lodging indicators for March 2013 by economic development region. Also shown are percent changes from March 2012. This graph allows individual regions within the state to track indicators specific to their general destinations, while still being able to compare their data to the state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

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

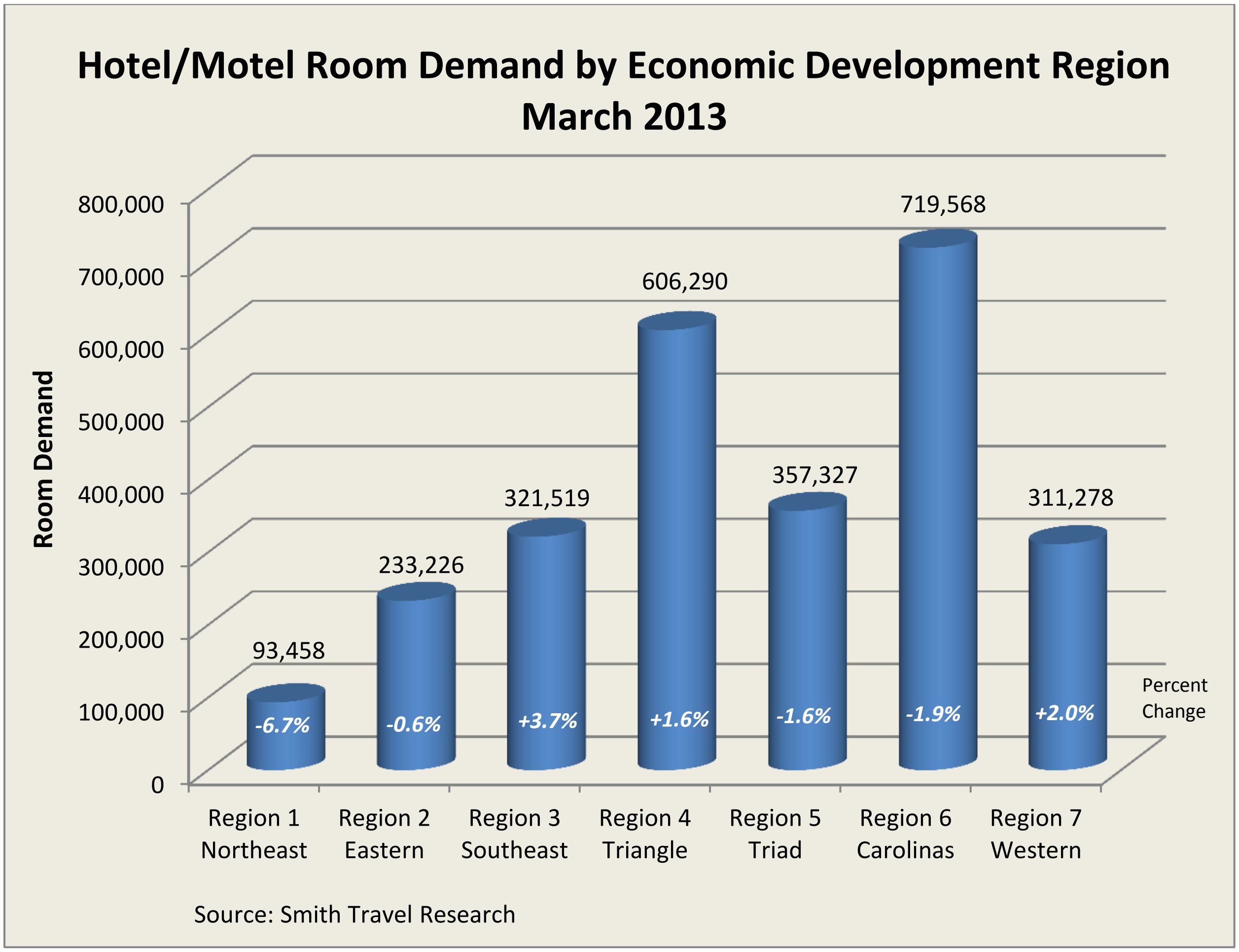


Chart 23 depicts hotel/motel demand for the month of March 2013 by economic development region. Demand is the number of rooms sold excluding complimentary rooms. Three of the seven regions experienced increased demand from March 2012 to 2013, particularly the Southeast Region (+3.7%).

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 TPO 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 – March 2013

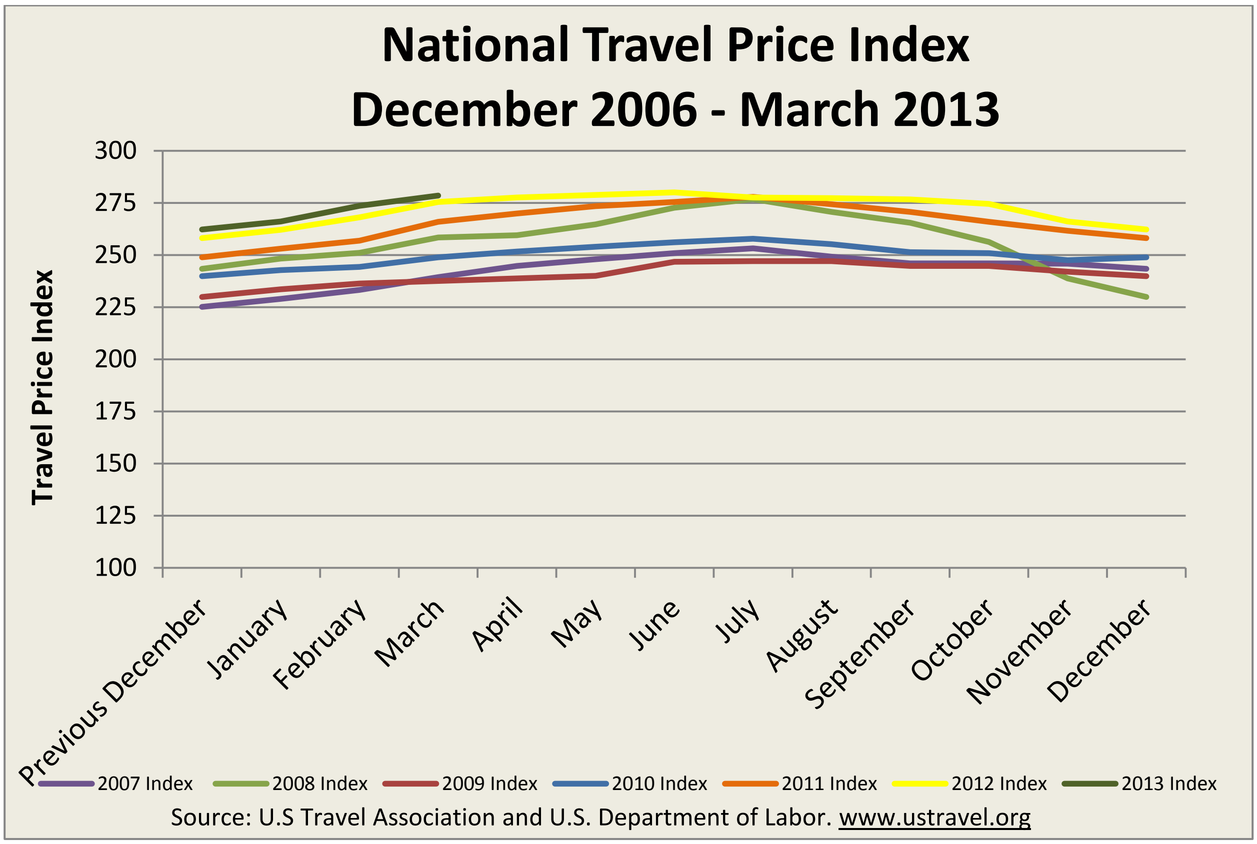


Chart 24 provides a seven year trend of the National Travel Price Index (TPI). Steady growth was experienced through mid-2008; however in November 2008, it is clear that as the TPI fell below 2007 levels, the tourism industry began feeling the full effect of the recession. In December 2010, the TPI finally inched above the each of the previous Decembers, and continued that year-over-year growth into June 2011. 2013 growth in travel prices continues at a steady pace.