



November 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 November 2013

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

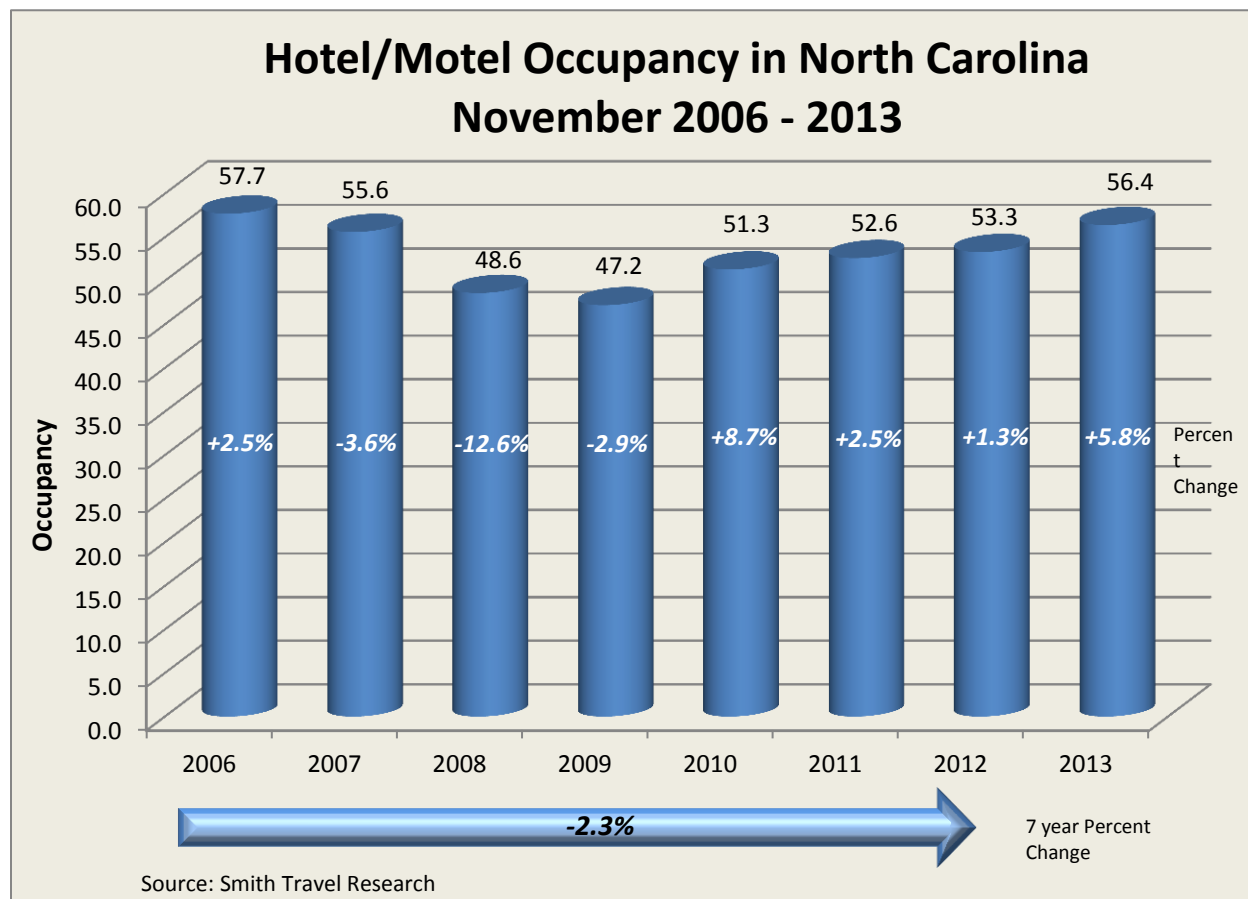


Chart 1 provides a comparison over a seven year period to show the trend of occupancy in the state for the month of November. Occupancy for November 2013 was up nearly six percent from November 2012. *Occupancy at the national level increased 2.1% in November 2013 from the previous year.*

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

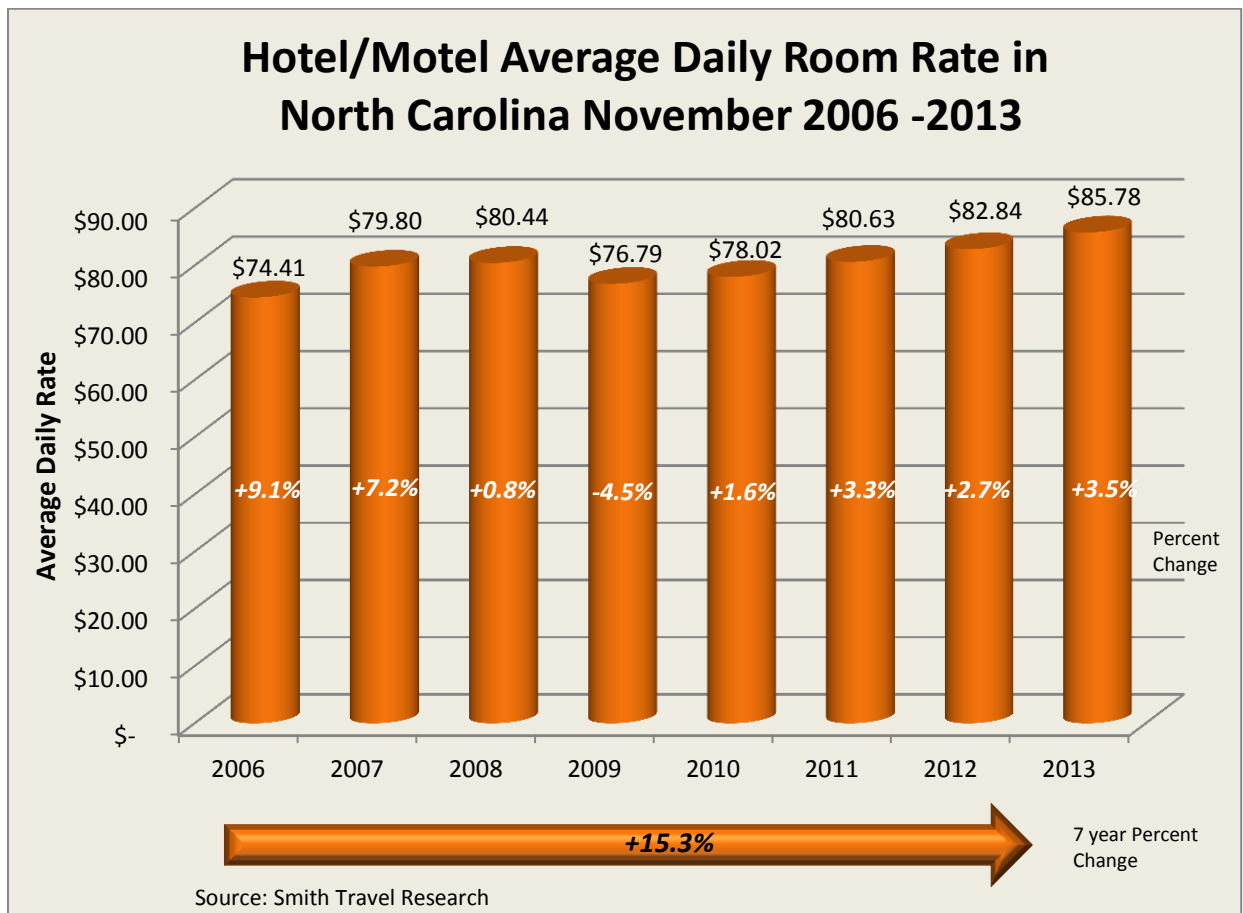
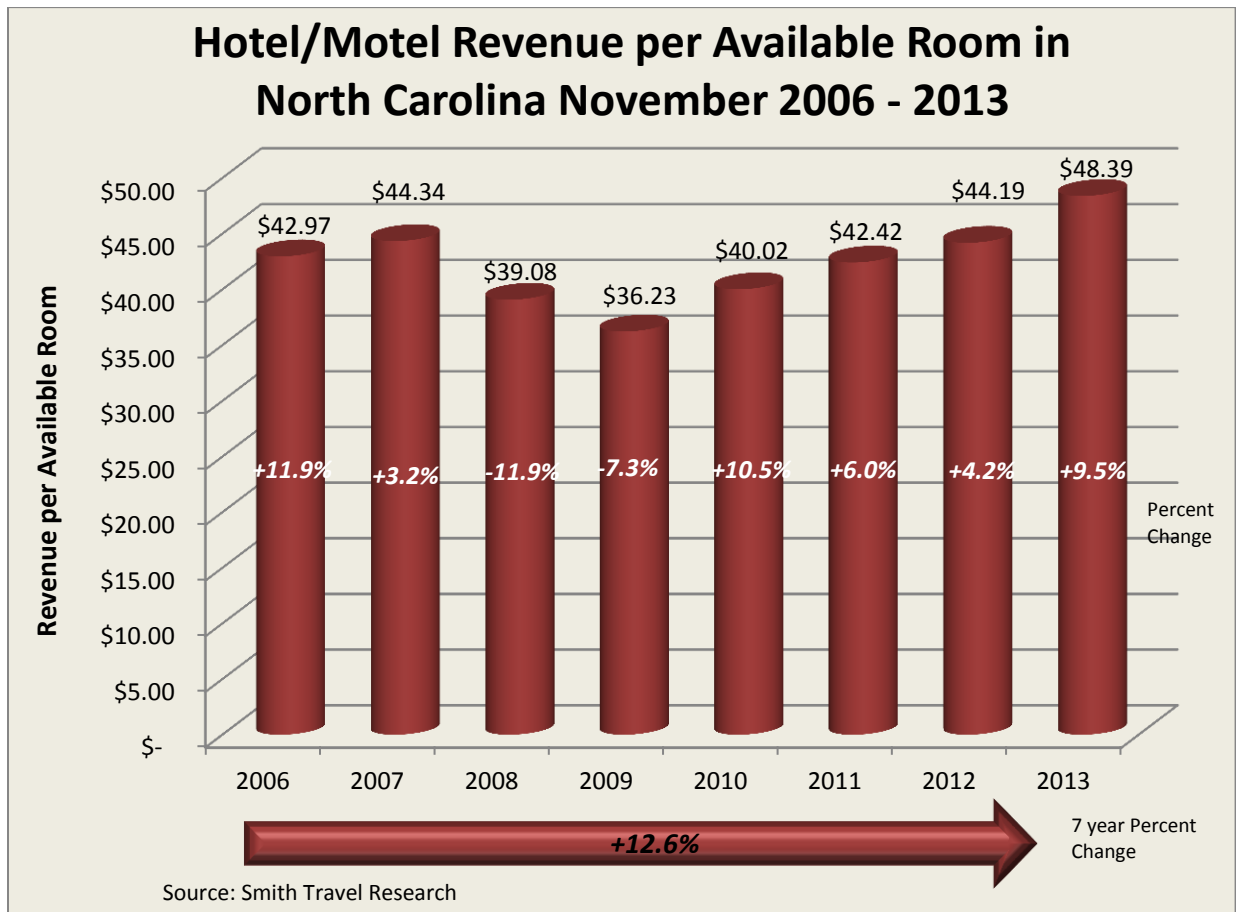


Chart 2 provides a comparison over a seven year period to show the trend of average daily room rate (ADR) in the state for the month of November. ADR increased more than three percent in November, and is up over fifteen percent over the last seven years. November 2013 ADR was the highest on record for the month of November in North Carolina. *ADR at the national level was up 2.6% in November 2013 from the previous November.*

Chart 3 – Hotel/Motel Revenue per Available Room in North Carolina - November 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 November. RevPAR was up nearly ten percent in November 2013 and at \$48.39 was the highest RevPAR on record for the month of November in the state. *RevPAR at the national level was up 4.7% in November 2013 from the previous November.*

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

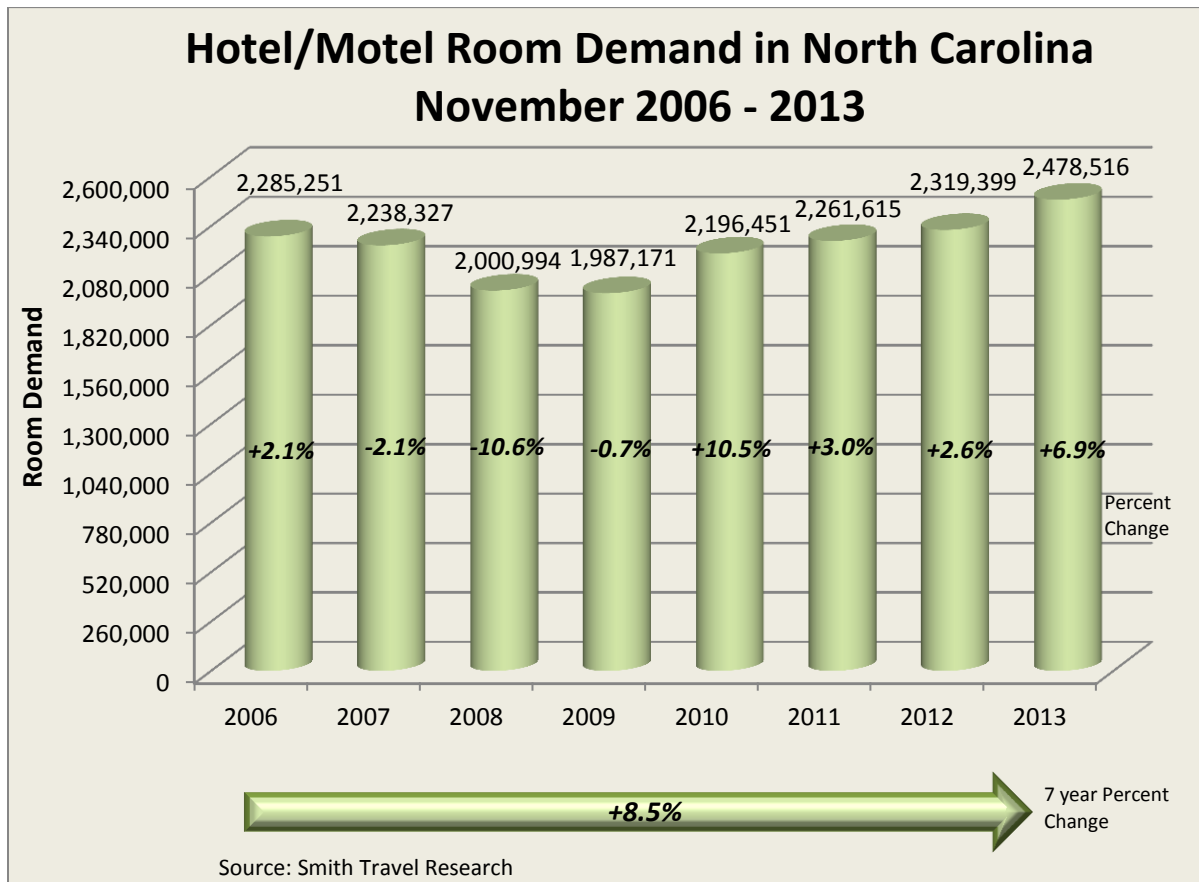


Chart 4 depicts hotel/motel demand for the month of November 2013 with comparisons to the previous seven years. Demand is the number of rooms sold excluding complimentary rooms. Room demand for November was up seven percent from November 2012. As with ADR and RevPAR, room demand statewide reached a record for November demand with approximately 2.5 million room nights sold during the month. Room demand at the national level saw an increase of 2.8% change in November 2013 from the previous November.

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

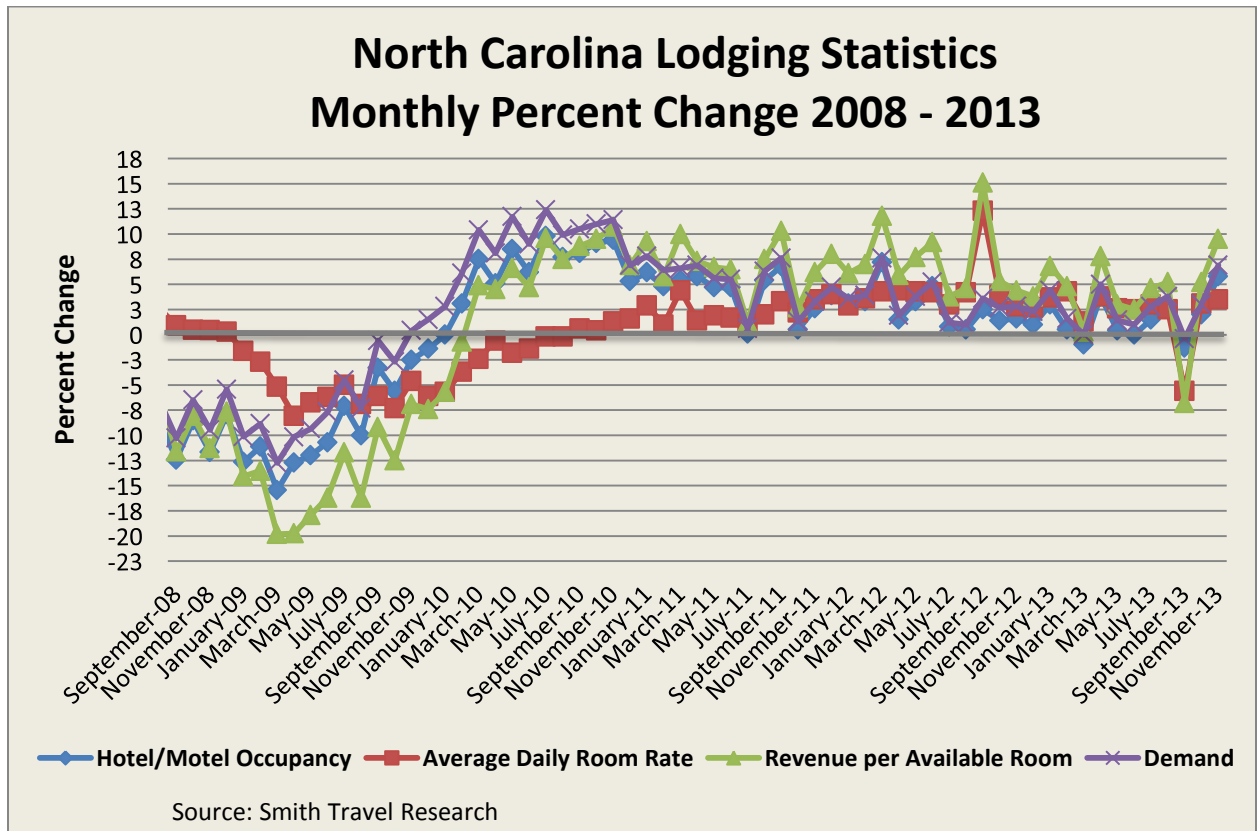


Chart 5 provides a monthly percent change for the four major lodging indicators. The chart allows for a five year trend-line analysis that clearly depicts that the major indicators have shown a steady positive change since early 2010. The November data shows increases in all indicators after decreases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

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

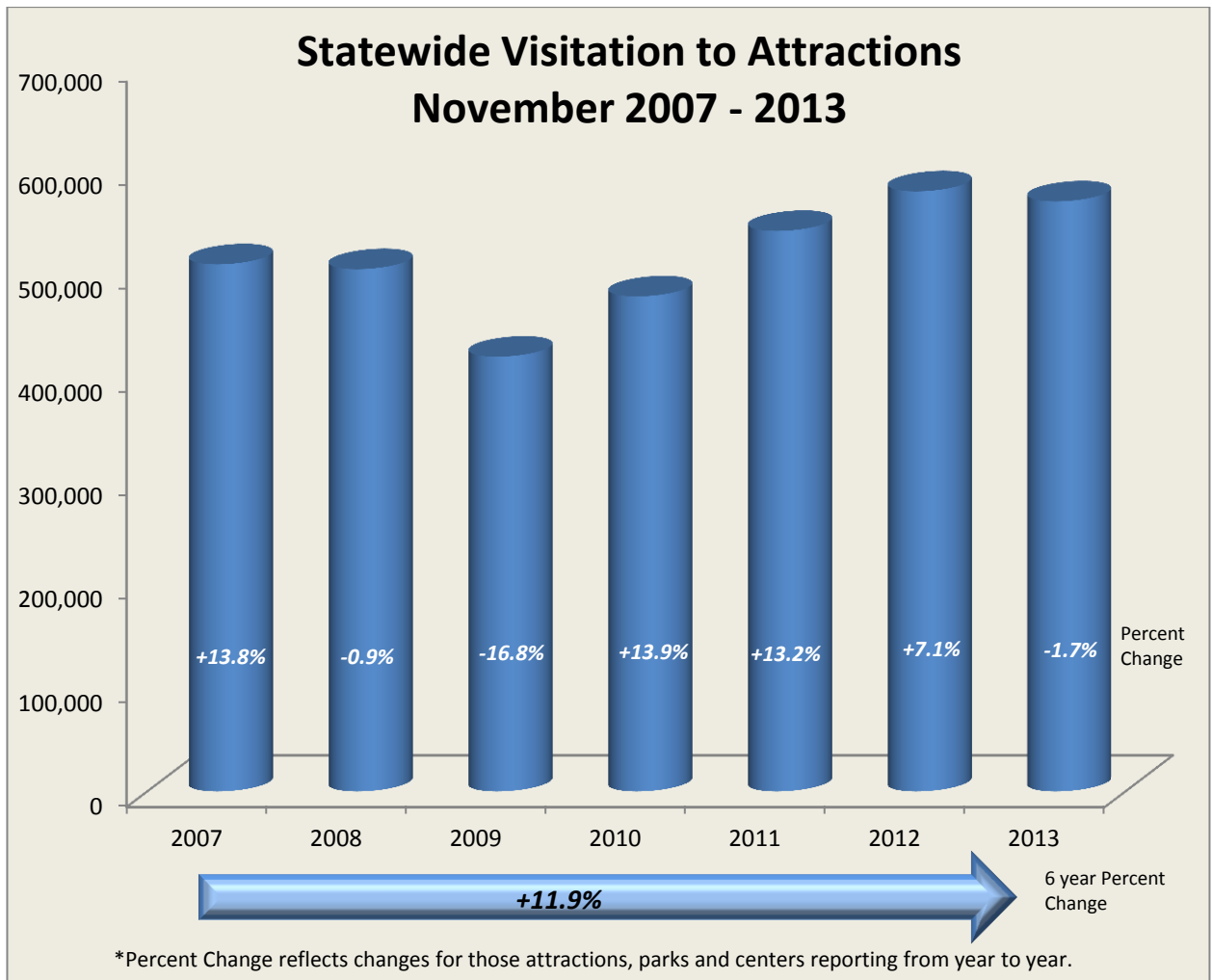


Chart 6 provides a status of the attractions industry in North Carolina for the month of November for the last seven years. The graph represents only a sample of North Carolina attractions that provide their attendance data, and is not intended to be considered a complete list of attractions. However,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

November attraction attendance was down less than two percent from 2012; however attendance for the month has increased twelve percent since 2007.

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

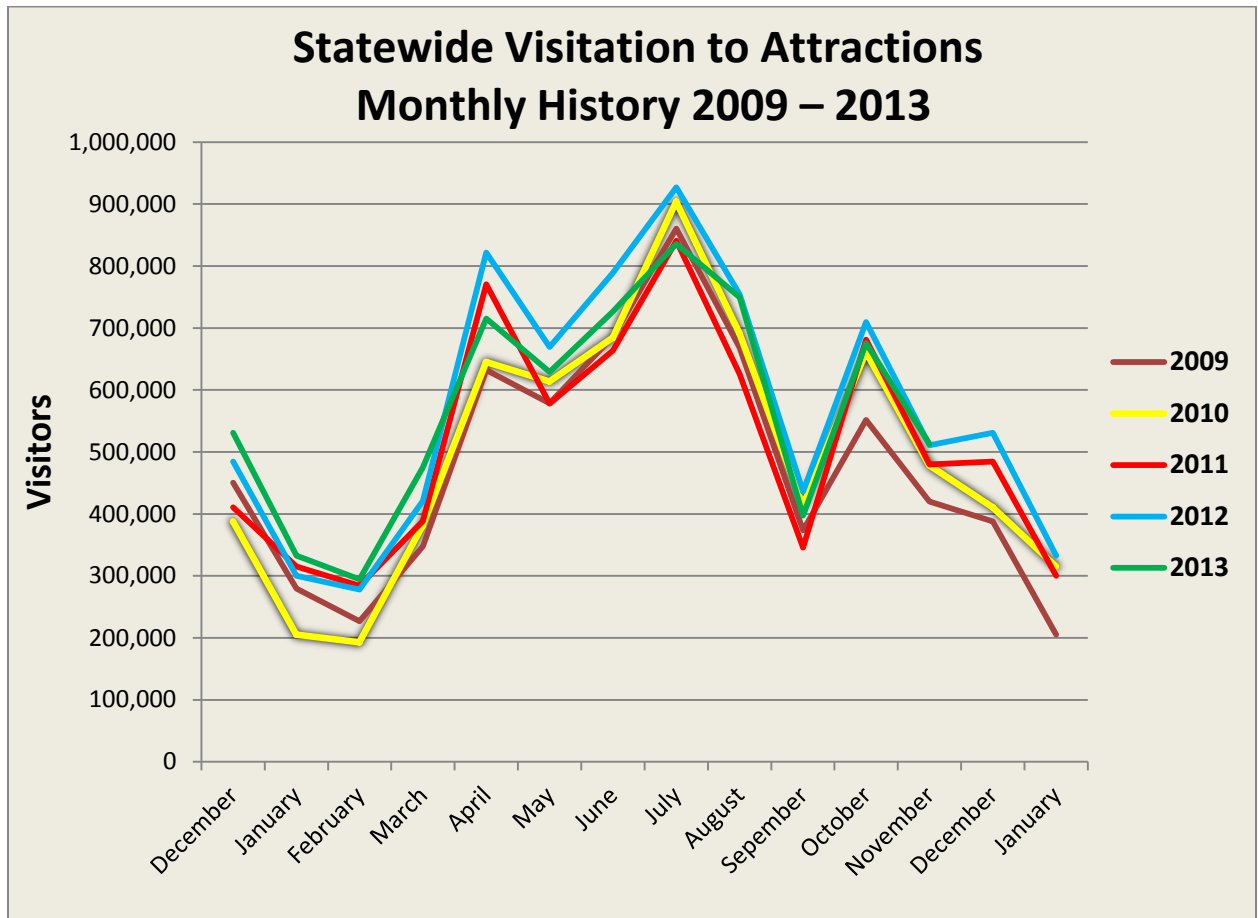


Chart 7 shows a monthly trend of attraction visitation for each of the last five years. This chart allows for a view of the ebb and flow of monthly attraction attendance, while also providing a look at how attendance compares to the same month of the previous years. Not surprisingly, the winter months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

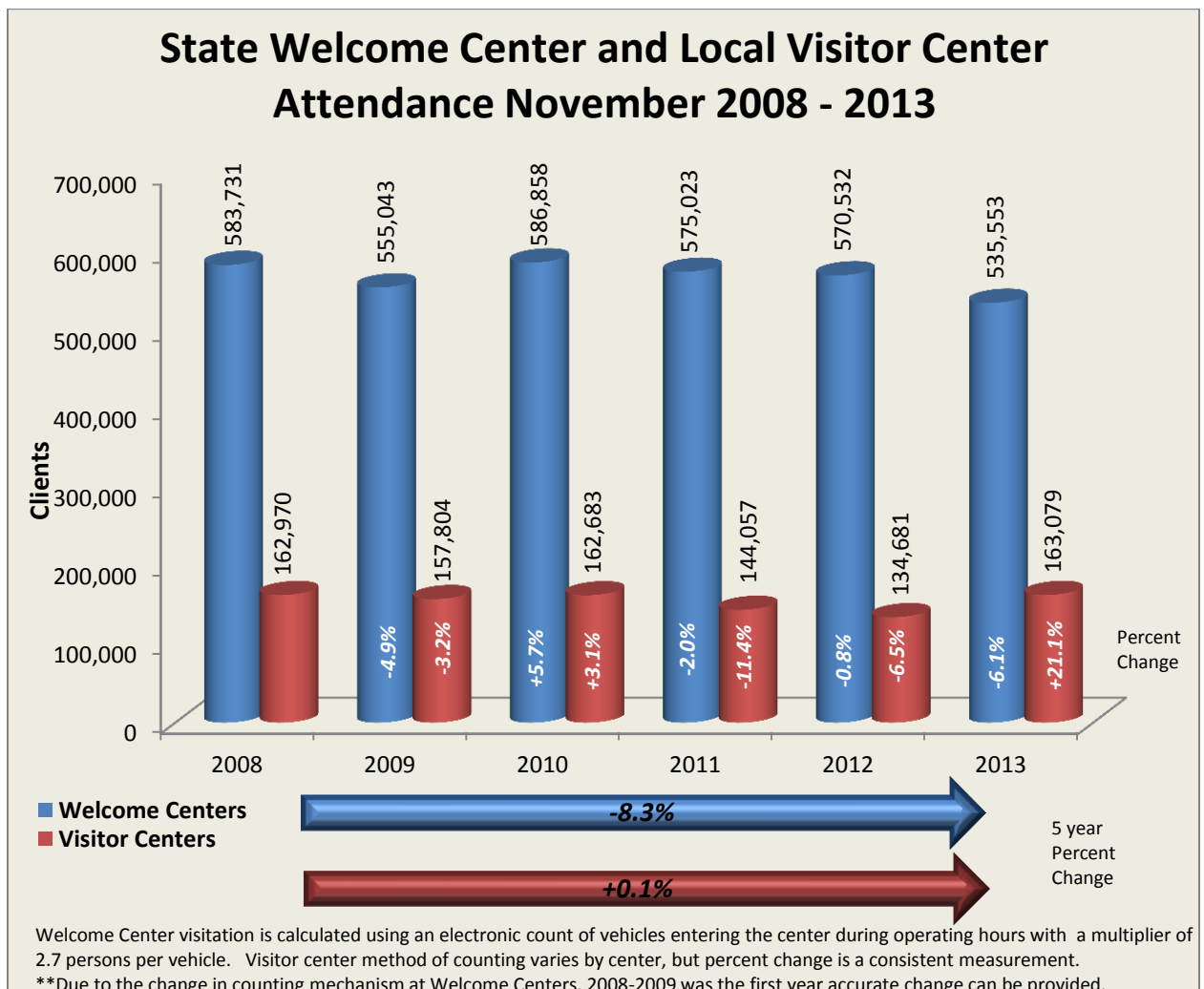


Chart 8 provides November visitation statistics for State Welcome Centers, as well as Local Visitor Centers throughout North Carolina. It should be noted that while there is a percent change indicated for welcome centers for 2007-2008 and 2008-2009, 2008 was the first year a percent change could accurately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

November welcome center was down six percent statewide from last year, while local visitor center visitation was up nearly over twenty percent from last November.

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

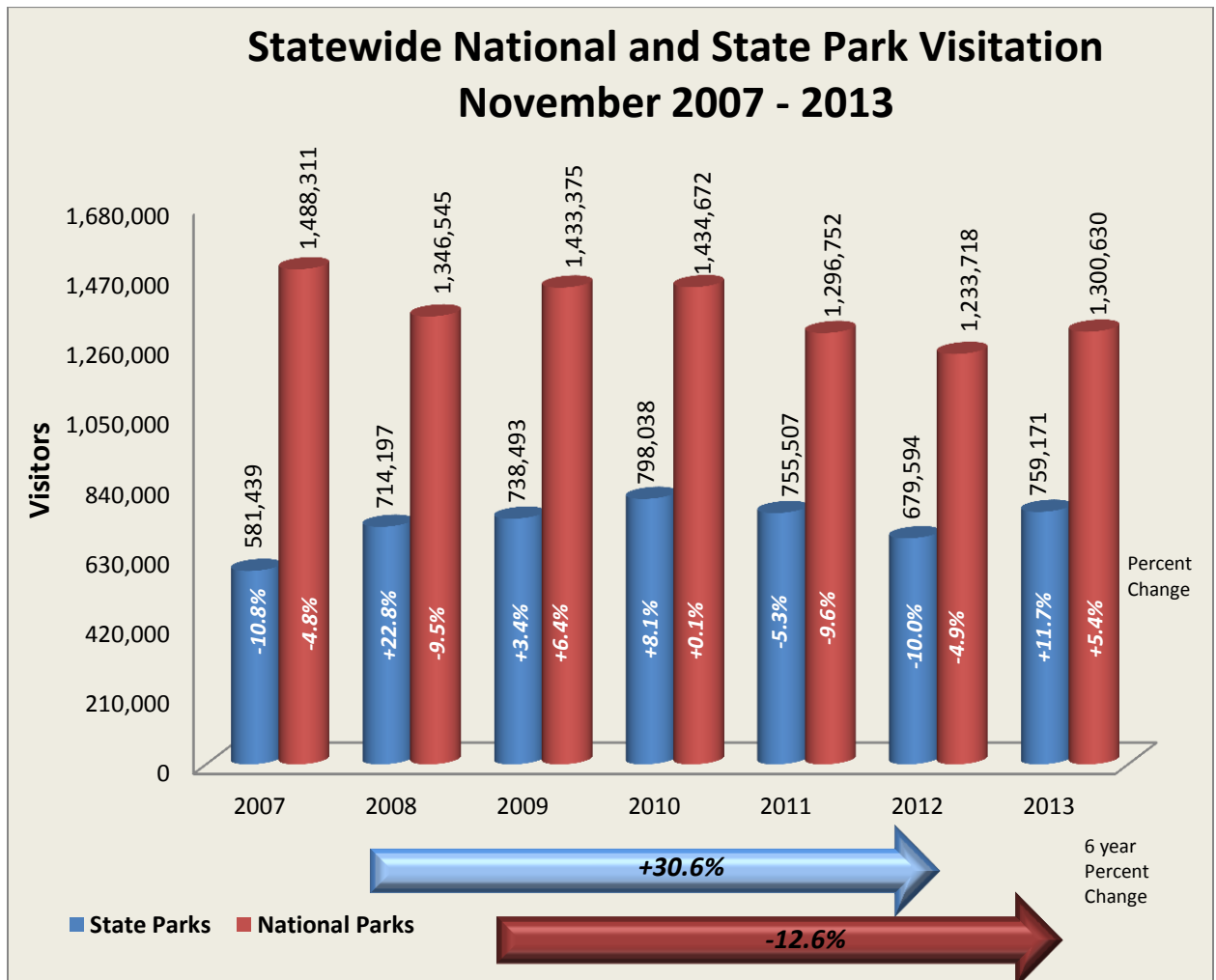
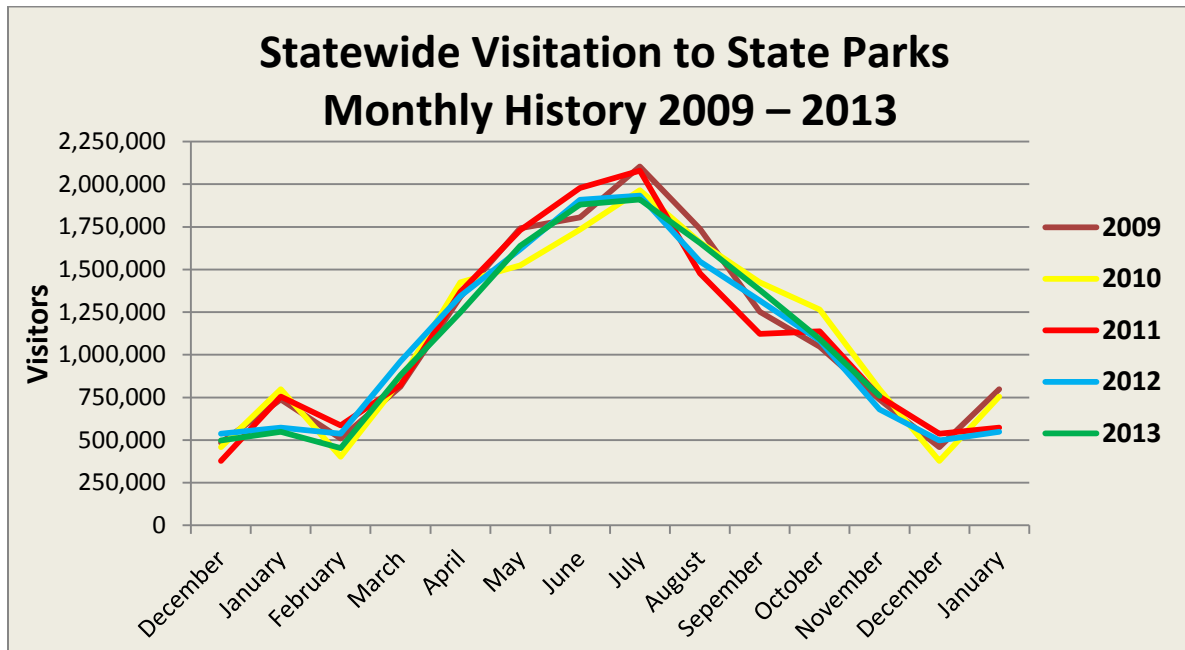


Chart 9 depicts visitation to state and national parks in North Carolina for the last seven years months of November. State park visitation was up nearly twelve percent in November from 2012 and national park visitation was up five percent from 2012.

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

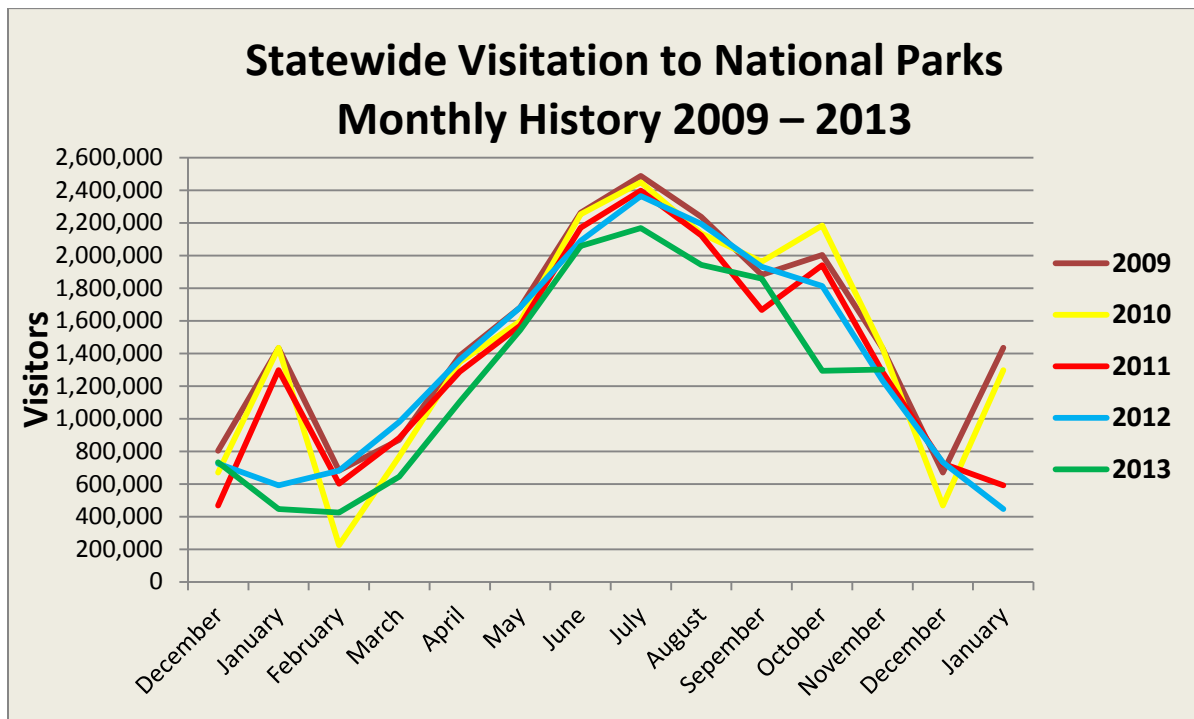


Chart 12 – Statewide Historic Sites Visitation - November 2009 – 2013

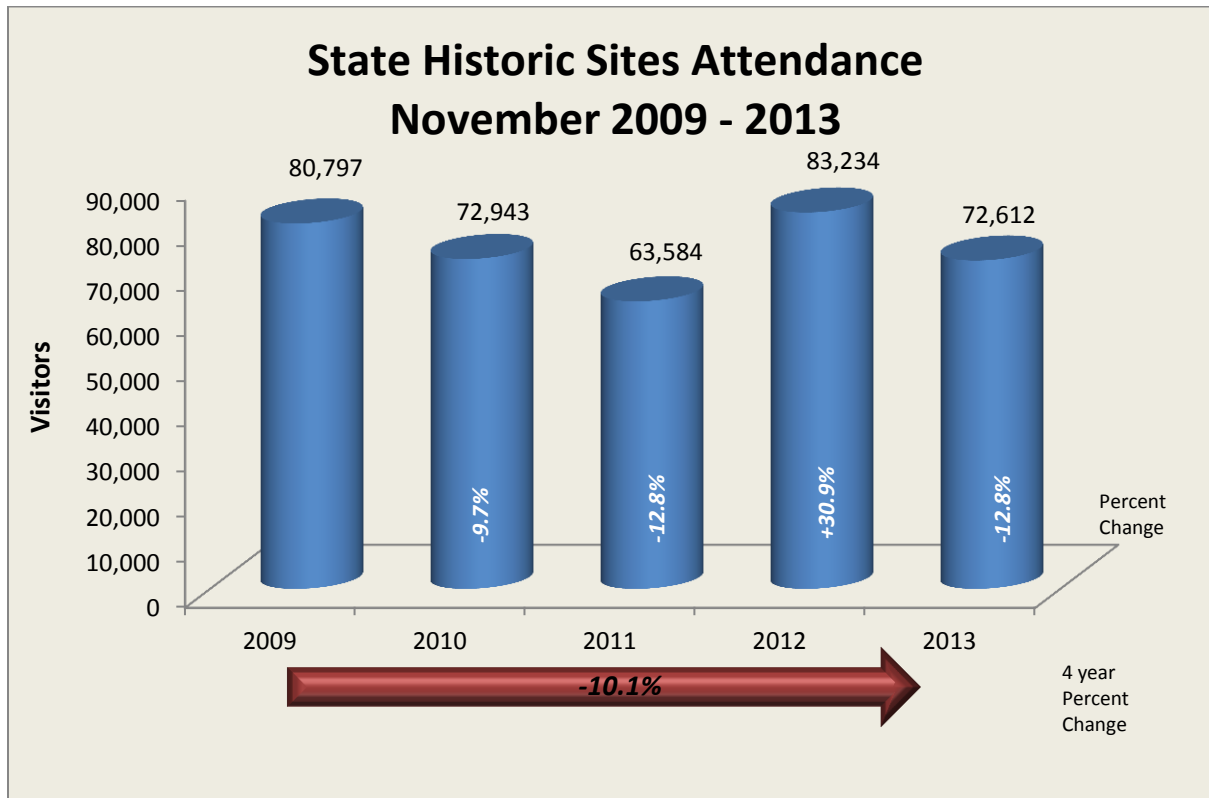


Chart 12 depicts visitation to State Historic Sites in North Carolina for the last five years of November. As this report has just begun tracking historic site visitation, more data is needed to determine the trend.

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

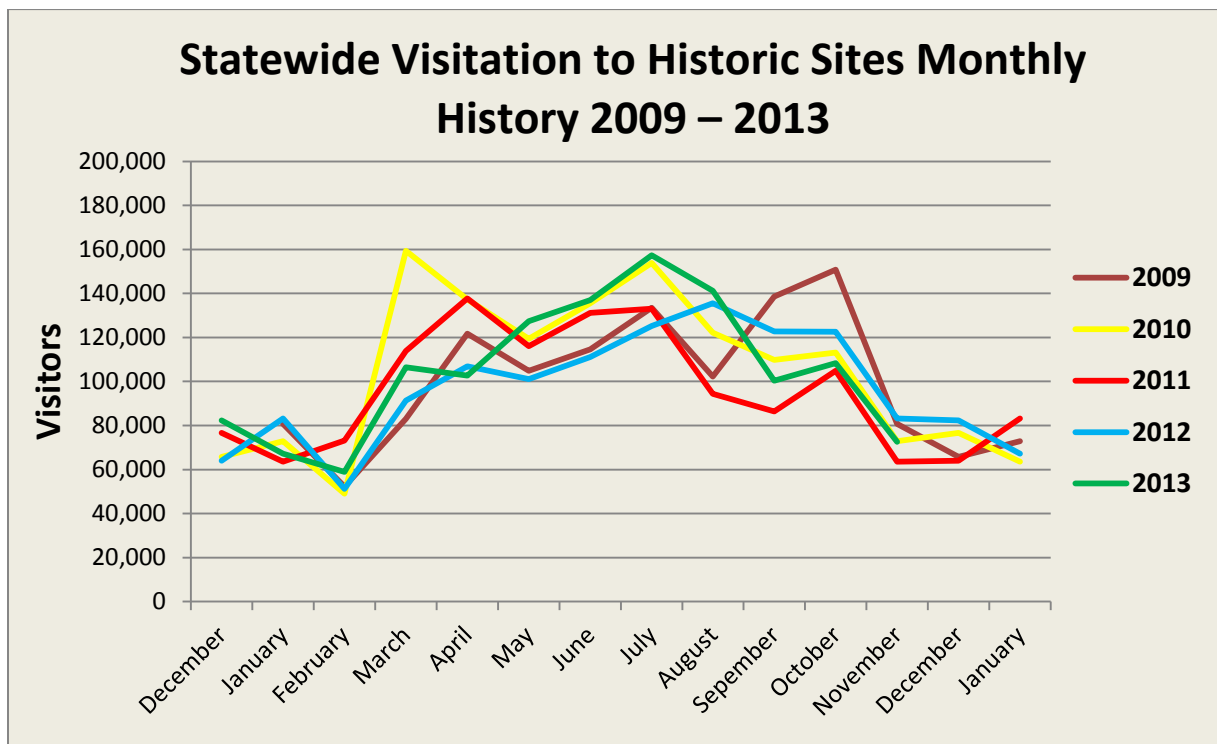


Chart 14 – Statewide Airport Arrivals and Departures – November 2007 – 2013

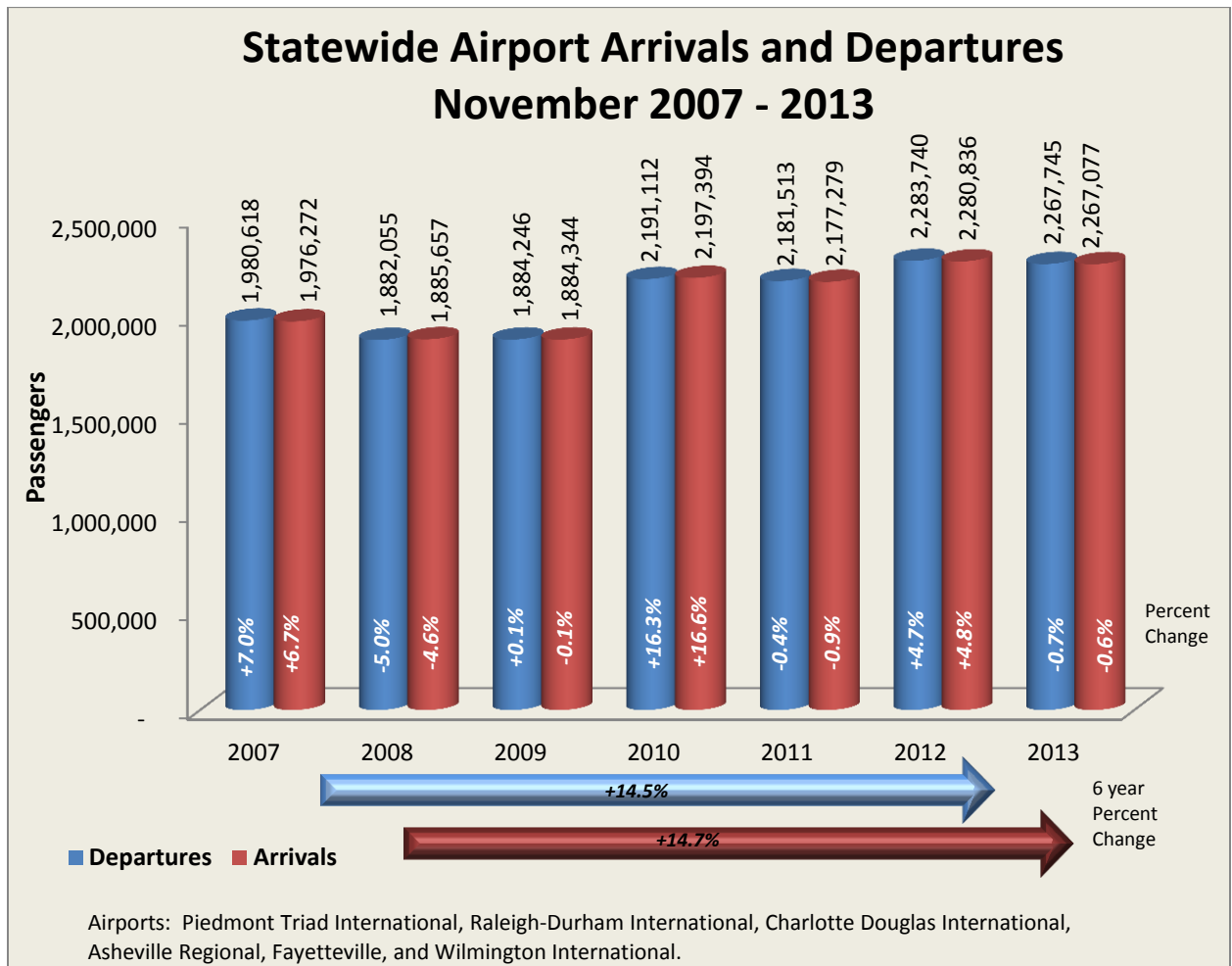


Chart 14 shows November airport arrivals and departures for each of the previous seven years. Both arrivals and departures were flat from November 2012 to 2013. However, there has been a fifteen percent increase in both for the month of November over the last six years.

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

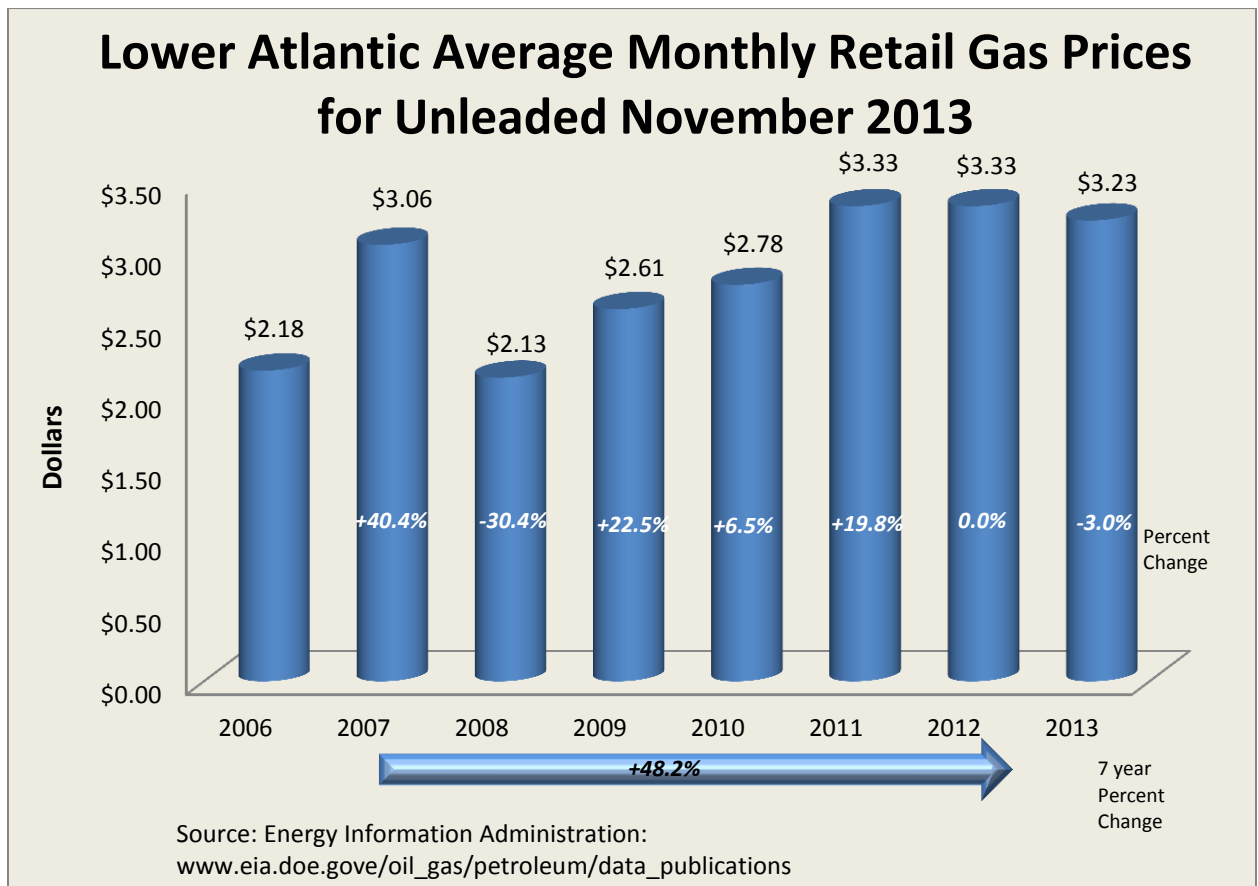


Chart 15 provides the average price per gallon of unleaded gasoline for November 2013 and the same month from the seven previous years. The data provided above, when compared with other indicators such as attraction attendance and visitor spending data, can be very helpful in the analysis of general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

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

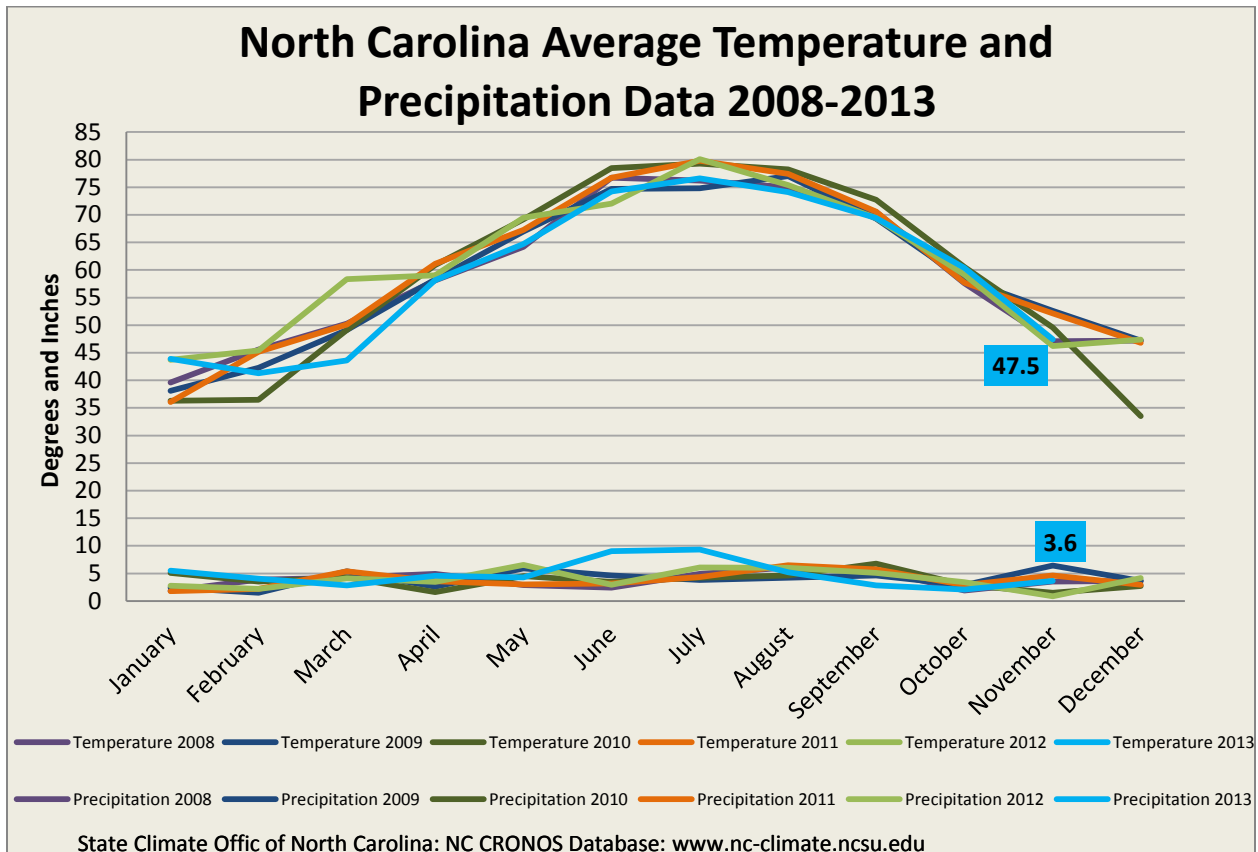


Chart 16 provides over 60 months of air temperature and precipitation data. This data, when analyzed together with gas price data and other tourism indicators, can be valuable in determining possible reasons for significant increases and/or decreases in indicators. For instance, greater than normal precipitation during a particular month can often help explain decreases in attendance at outdoor attractions. November 2013 appeared slightly cooler than average in terms of temperature and average in terms of precipitation.

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

Chart 17 – Hotel/Motel Statistics by Geographic Region – November 2013

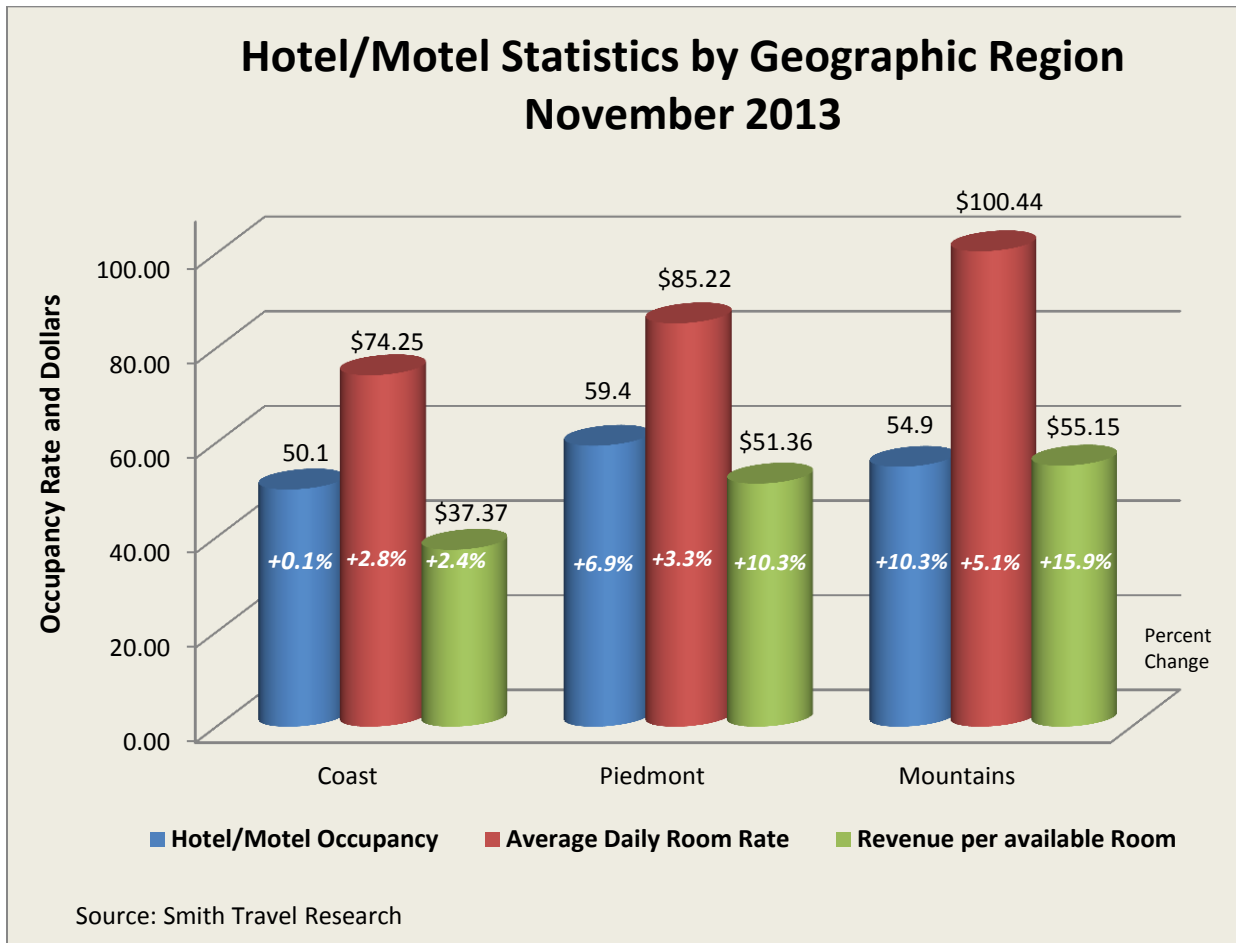


Chart 17 provides a one year comparison in lodging statistics for the three geographic marketing regions of North Carolina in November. Year over year lodging indicators show growth in the Mountain Region outpacing the other two regions, though all three regions showed positive indicators.

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

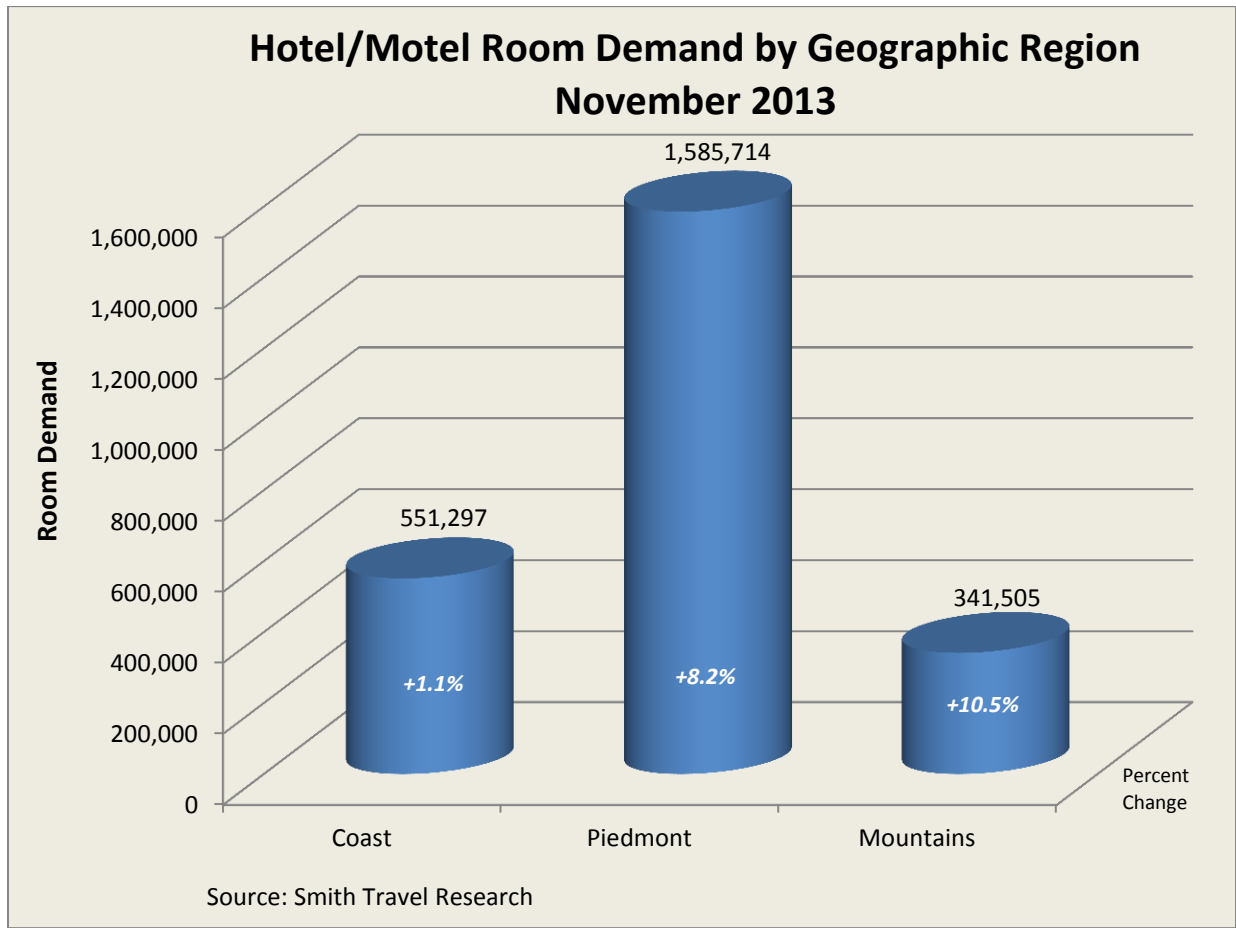


Chart 18 provides hotel/motel demand by geographic region for November 2013. Demand differs from occupancy in that it is the total number of rooms sold, not accounting for differences in room supply. The Mountain Region demand of lodging increased over ten percent from November 2012 while the Piedmont Region demand increased nearly more than eight percent in November.

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

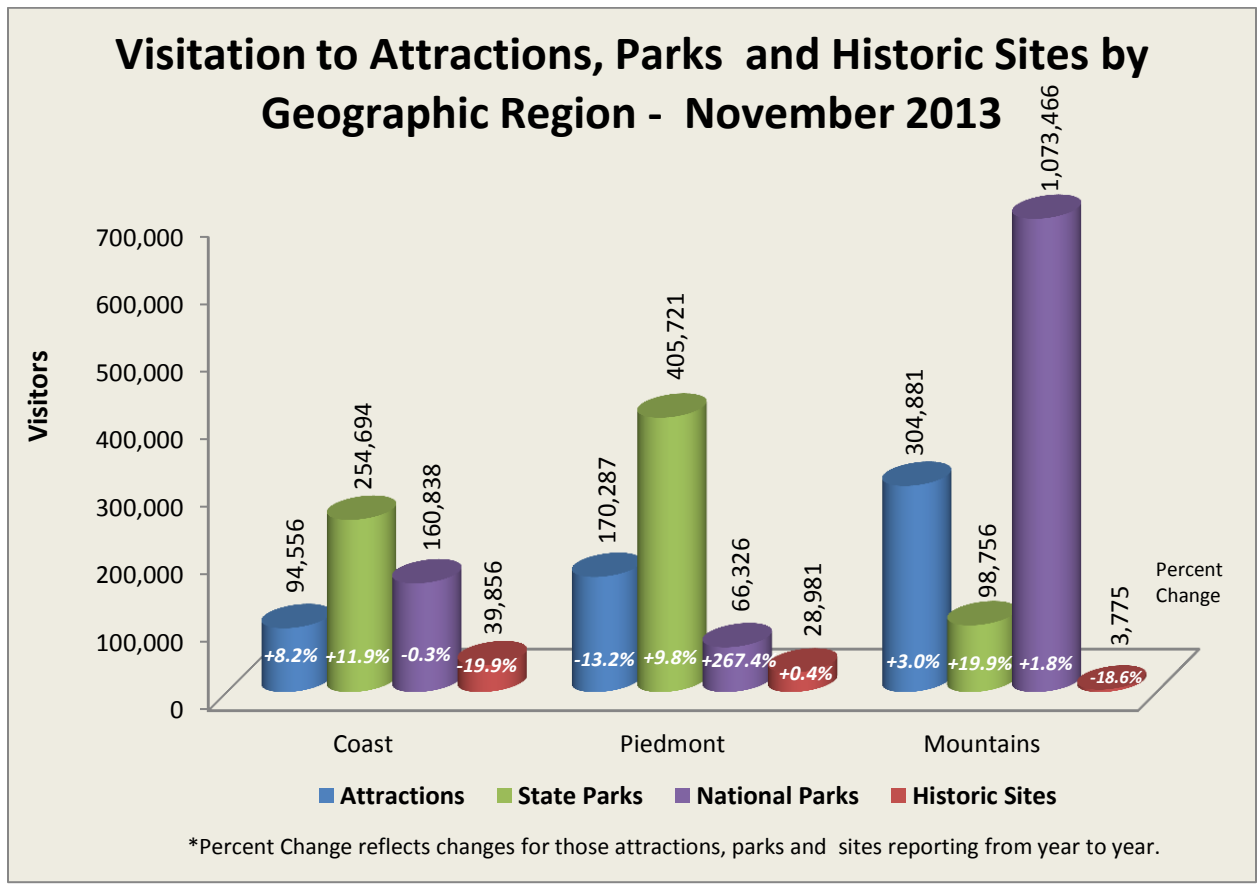


Chart 19 provides a look at the attractions industry in North Carolina in November 2013 by geographic region. As with the statewide numbers, the following data represents only a sample of North Carolina attractions that provide their attendance data, and are not intended to be considered a complete list 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 all three regions from November 2012 to November 2013, while national park visitation was up in the mountains and piedmont and flat in the Coastal Region. Historic site visitation was flat in the Piedmont Region, but down in the other two regions.

Chart 20 – State Welcome Center & Local Visitor Center Attendance by Geographic Region – November 2013

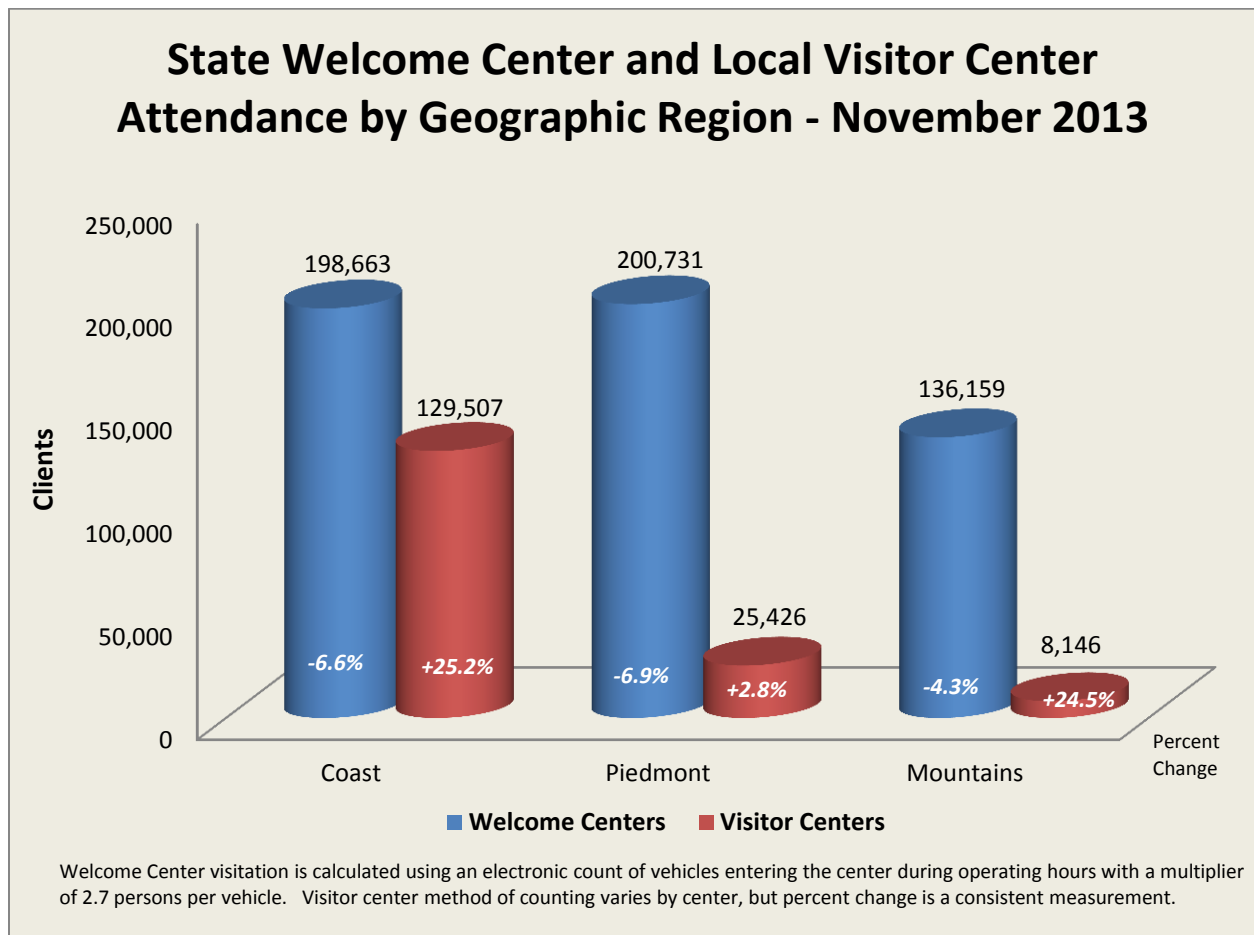


Chart 20 shows welcome center and visitor center attendance by geographic region and offers comparisons from November 2012. Local centers showed growth in visitation in each of the regions from 2012 to 2013, while welcome center visitation was down.

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

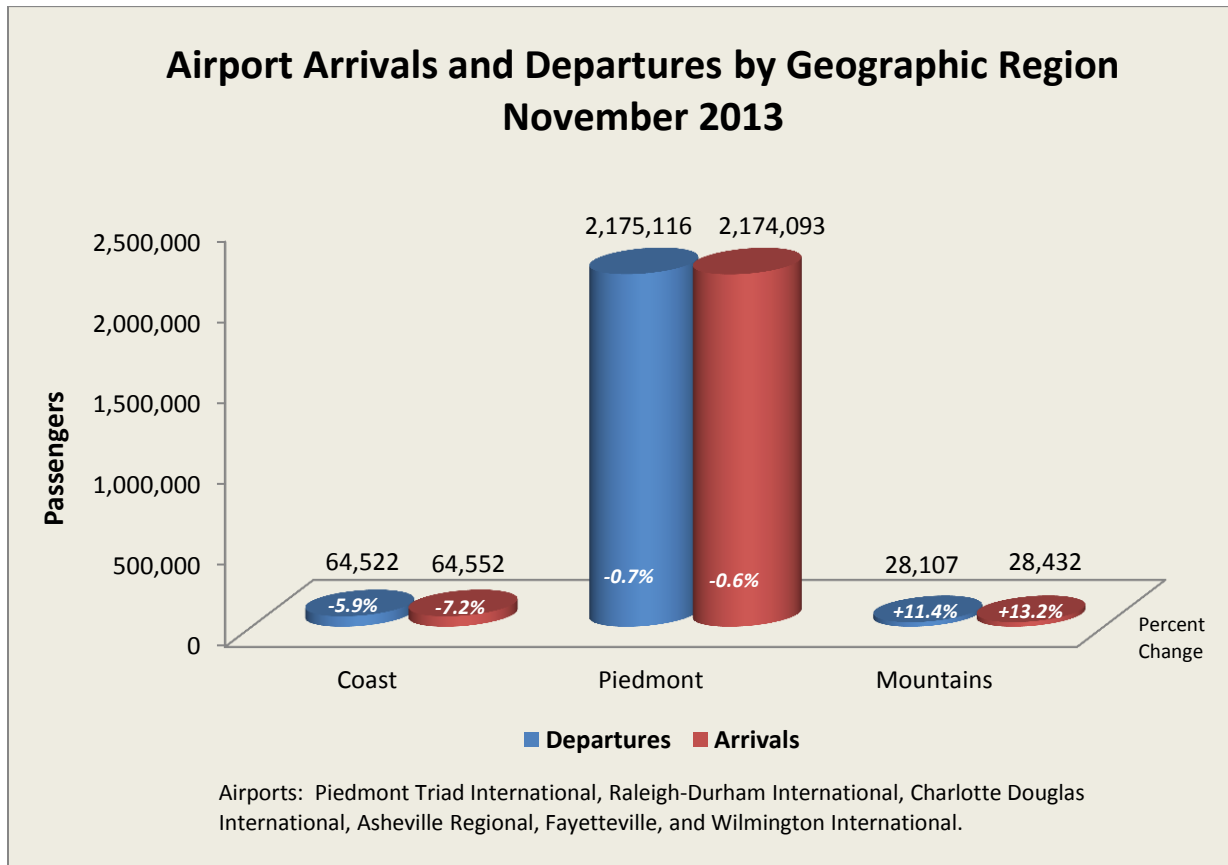


Chart 21 provides a breakdown of air travel statistics by geographic region. While the majority of air traffic is through the Piedmont Region, it is helpful to maintain a trend of other regional airport usage. The Piedmont Region was flat in terms of arrivals and departures in November, while the Mountain Region showed increases of over eleven percent.

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

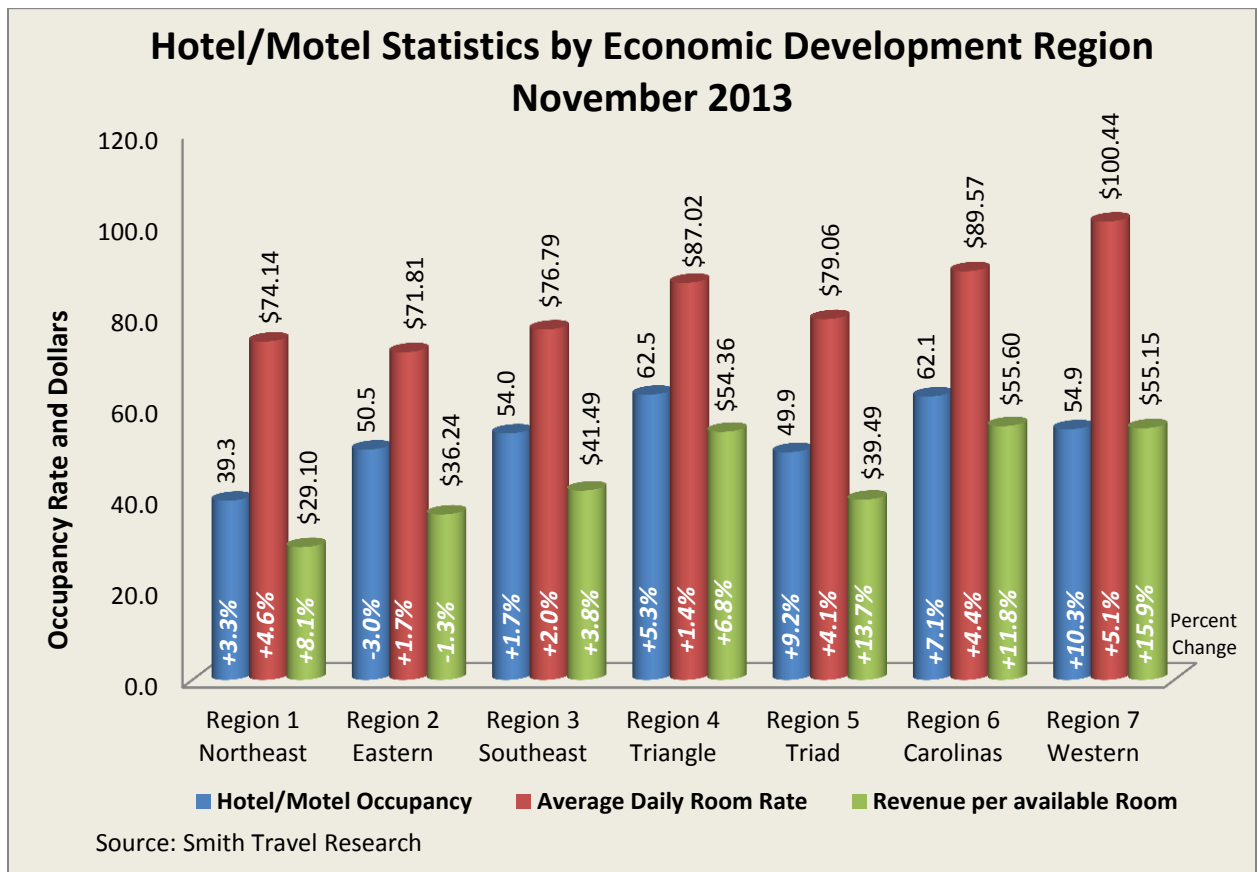


Chart 22 provides lodging indicators for November 2013 by economic development region. Also shown are percent changes from November 2012. This graph allows individual regions within the state to track indicators specific to their general destinations, while still being able to compare their data to the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

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

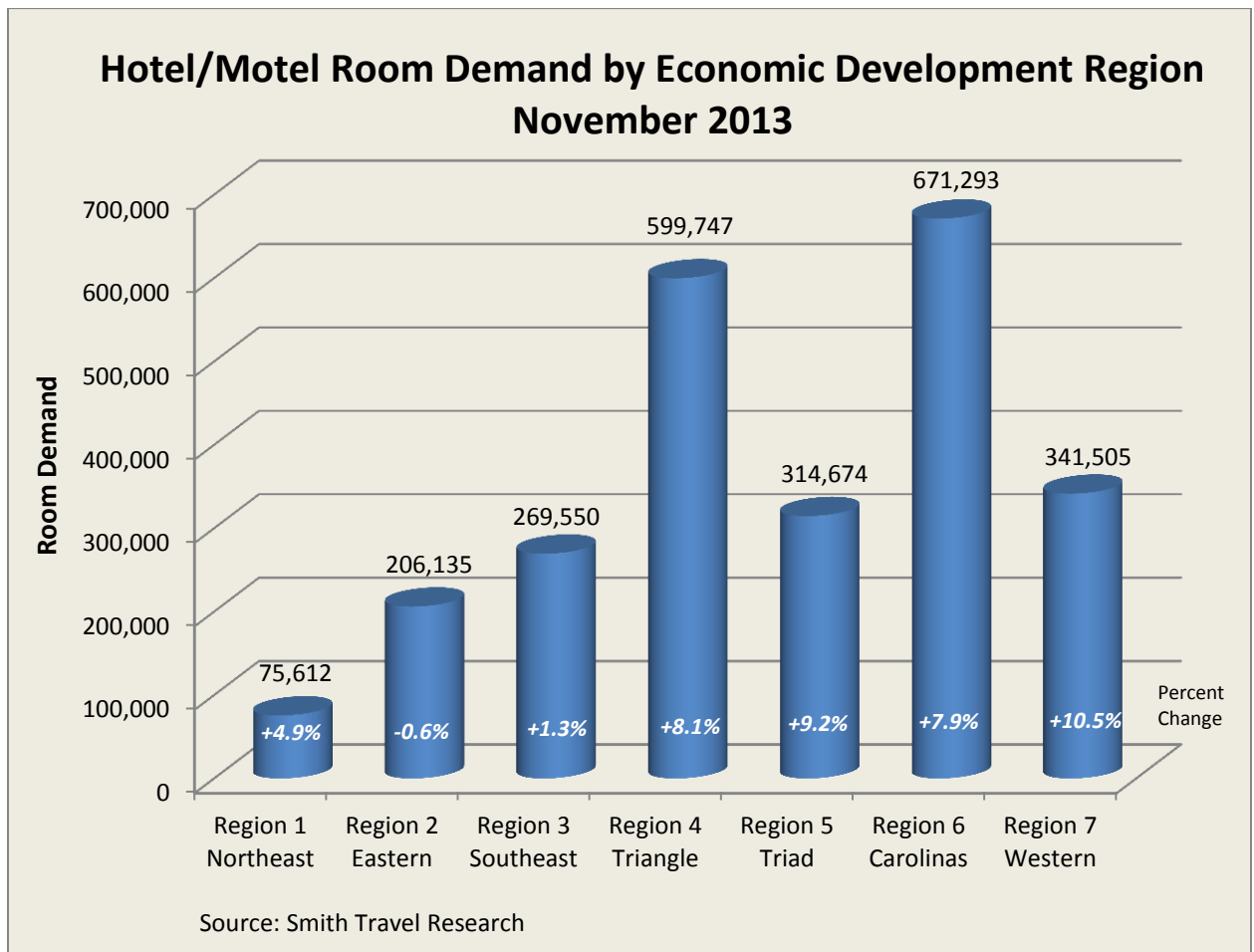


Chart 23 depicts hotel/motel demand for the month of November 2013 by economic development region. Demand is the number of rooms sold excluding complimentary rooms. Six of the regions showed positive demand growth from 2012 to 2013, while the Eastern Region was flat.

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 – November 2013

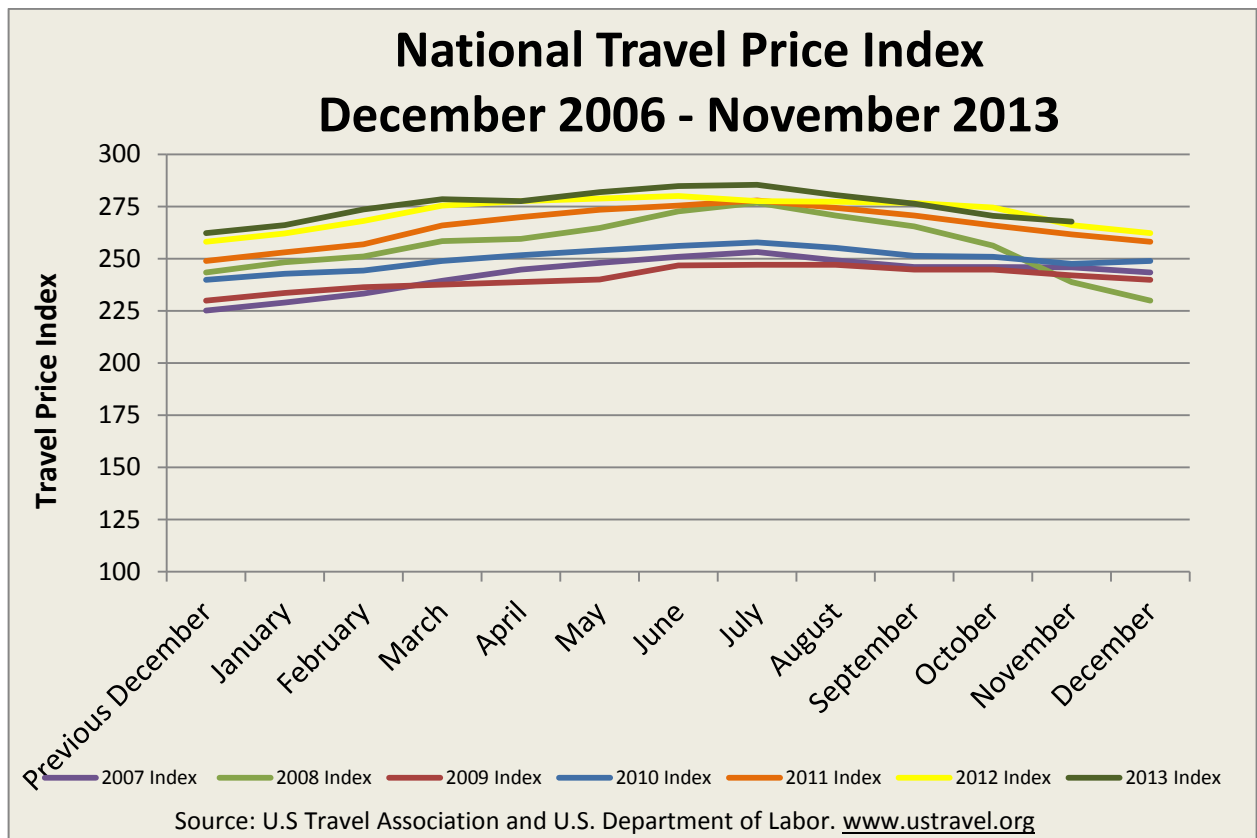


Chart 24 provides a seven year trend of the National Travel Price Index (TPI). Steady growth was experienced through mid-2008; however in November 2008, it is clear that as the TPI fell below 2007 levels, the tourism industry began feeling the full effect of the recession. In December 2010, the TPI finally 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 November edged above the 2012 index, and is still above all other previous years.

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