traveltracker

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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.

Following is a guide to charts and graphs for this report:

Section 1 - Statewide Tourism Indicator Analysis for September 2009
Chart 1 – Hotel/Motel Occupancy in North Carolina September 2006 – 2009
Chart 2 – Hotel/Motel Average Daily Room Rate in North Carolina September 2006 – 2009
Chart 3 – Hotel/Motel Revenue per Available Room in North Carolina September 2006 – 2009
Chart 4 – Hotel/Motel Room Demand in North Carolina September 2006 – 2009
Chart 5 – North Carolina Lodging Statistics Monthly Percent Change 2008 – 2009
Chart 6 – Statewide Visitation to Attractions September 2006 – 2009
Chart 7 – Statewide Visitation to Attractions Monthly History 2006 – 2009
Chart 8 – State Welcome Center and Local Visitor Center Attendance September 2006 – 2009
Chart 9 – Statewide National and State Park Visitation September 2006 – 2009
Chart 10 – Statewide Visitation to State Parks Monthly History 2006 – 2009
Chart 11 – Statewide Visitation to National Parks Monthly History 2006 – 2009
Chart 12 – Statewide Airport Arrivals and Departures September 2006 – 2009
Chart 13 – Lower Atlantic Average Monthly Retail Gas Prices for Unleaded September 2006 – 2009
Chart 14 – North Carolina Average Temperature and Precipitation September 2008 – 2009

Section 2 – Geographic Marketing Region Tourism Indicator Analysis for September 2009
Chart 15 – Hotel/Motel Statistics by Geographic Region September 2009
Chart 16 – Hotel/Motel Room Demand by Geographic Region September 2009
Chart 17 – Visitation to Attractions and Parks by Geographic Region – September 2009
Chart 18 – State Welcome Center & Local Visitor Center Attendance by Geographic Region – September 2009
Chart 19 – Airport Arrivals and Departures by Geographic Region – September 2009

Section 3 – Economic Development Region Tourism Indicator Analysis for September 2009
Chart 20 – Hotel/Motel Statistics by Economic Development Region September 2009
Chart 21 – Hotel/Motel Room Demand by Economic Development Region September 2009

Section 4 – National Travel Price Index
Chart 22 - National Travel Price Index December 2006 – September 2009

Section 1: Statewide Tourism Indicator Analysis for September 2009

Chart 1 – Hotel/Motel Occupancy in North Carolina - September 2006 – 2009

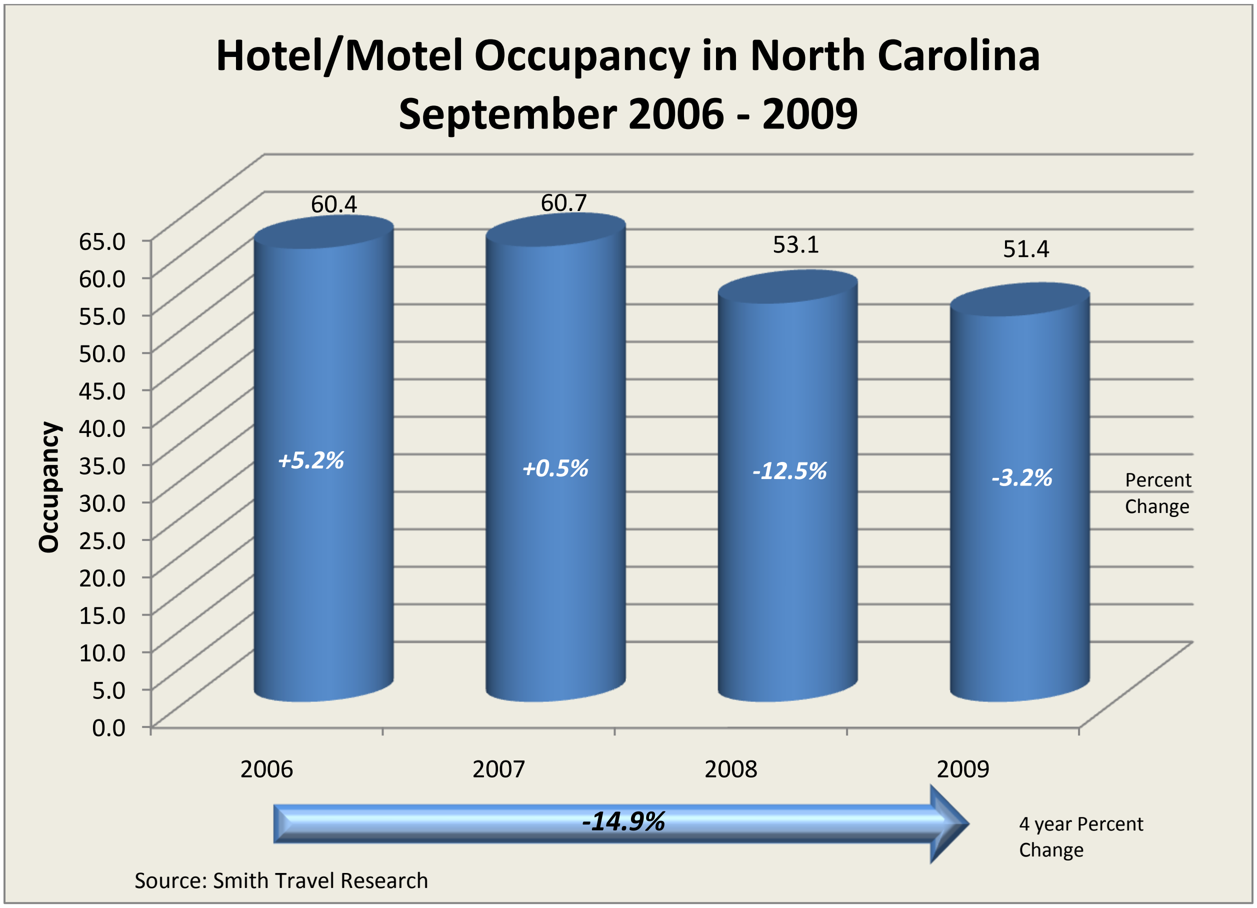


Chart 1 provides a comparison over a four year period to show the trend of occupancy in the state for the month of September. Occupancy for September 2009 did not decline at near the rate that it did last year, but the rate is almost 15% below where it was in 2006. *Occupancy at the national level also experienced a decrease in September 2009. It was down –6.3% from the previous September*.

Chart 2 – Hotel/Motel Average Daily Room Rate in North Carolina - September 2006 – 2009

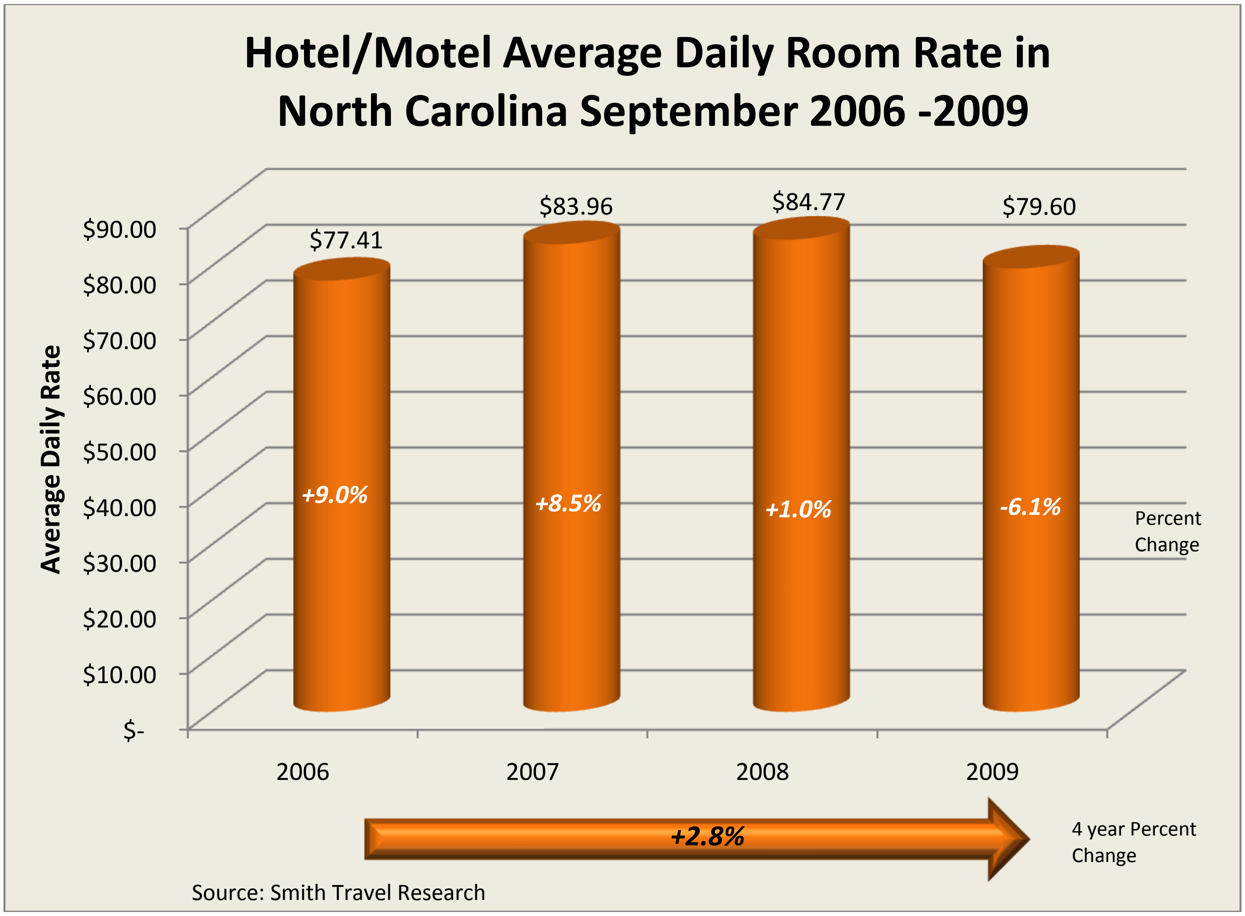
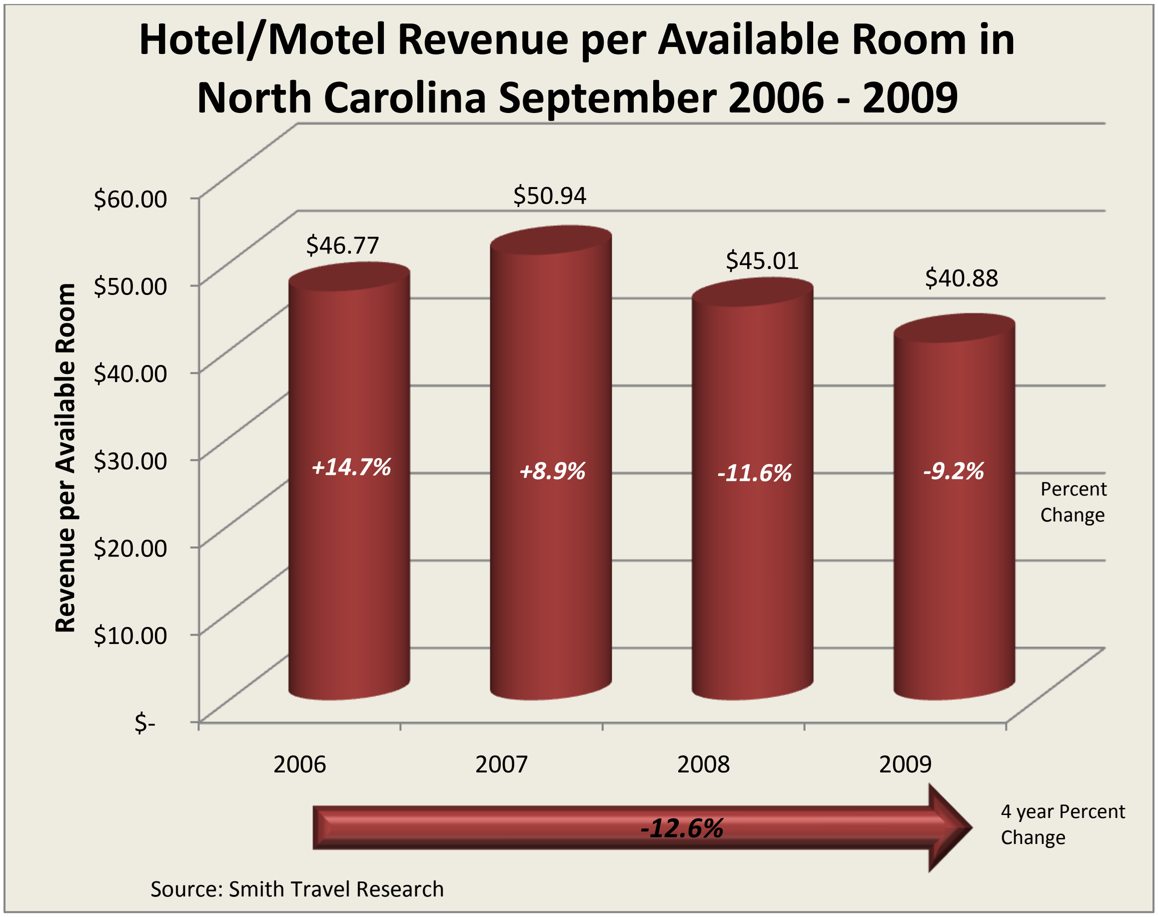


Chart 2 provides a comparison over a four year period to show the trend of average daily room rate (ADR) in the state for the month of September. The ADR for past years have shown increases however this September experienced a significant decline (though still above 2006 rates). *ADR at the national level was down -10.2% in September 2009 from the previous September.*

Chart 3 – Hotel/Motel Revenue per Available Room in North Carolina - September 2006 – 2009



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 four year period to show the trend of RevPAR in the state for the month of August. As with the ADR, RevPar was down significantly for September 2009 relative to the previous year, and below 2006 RevPAR. *RevPAR at the national level was down -15.9% in September 2009 from the previous September.*

Chart 4 – Hotel/Motel Room Demand in North Carolina - September 2006 – 2009

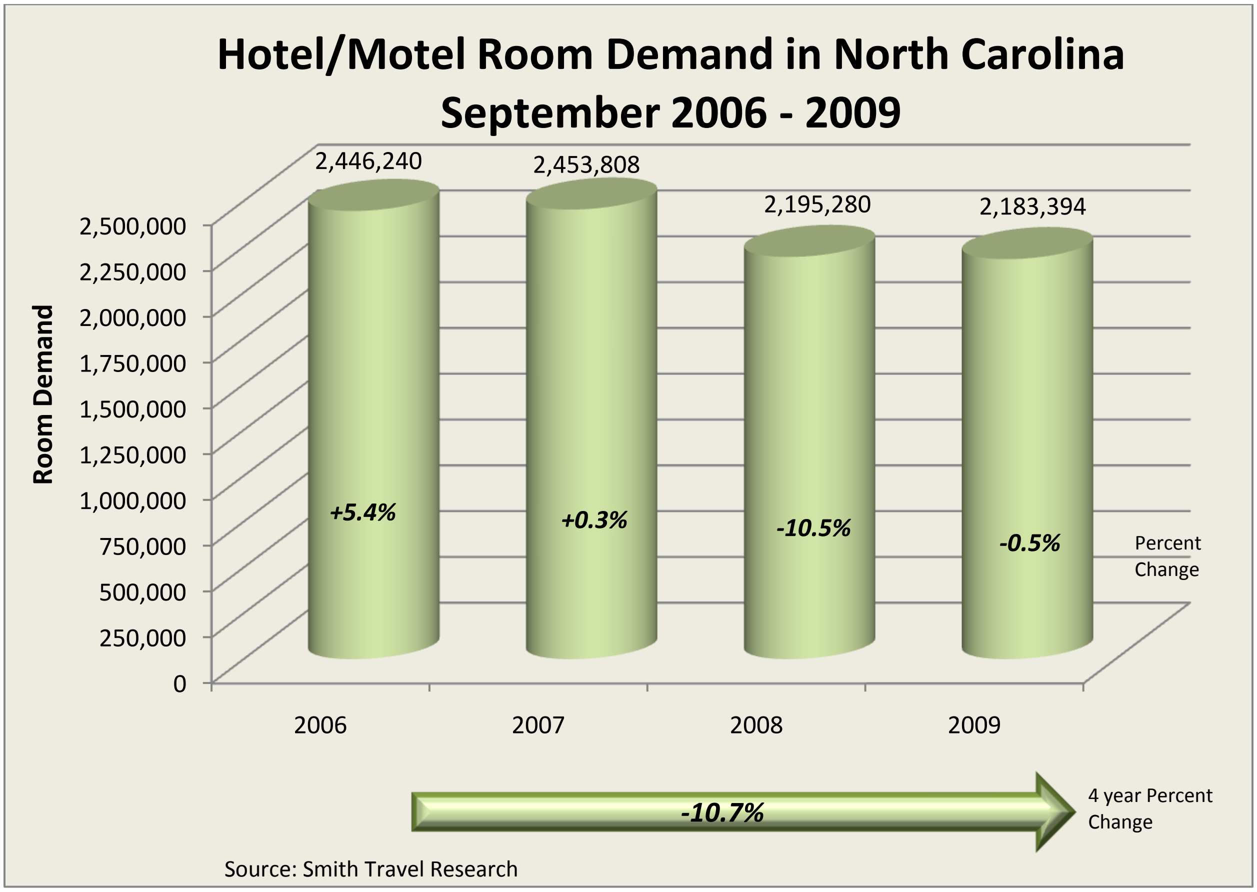


Chart 4 depicts hotel/motel demand for the month of September 2009 with comparisons to the previous three years. Demand is the number of rooms sold excluding complimentary rooms. Room Demand for August was only down -0.5% from September 2008. *Room Demand at the national level also saw a decline with a -3.3% change in September 2009 from the previous September.*

Chart 5 – North Carolina Lodging Statistics Monthly Percent Change 2008 – 2009

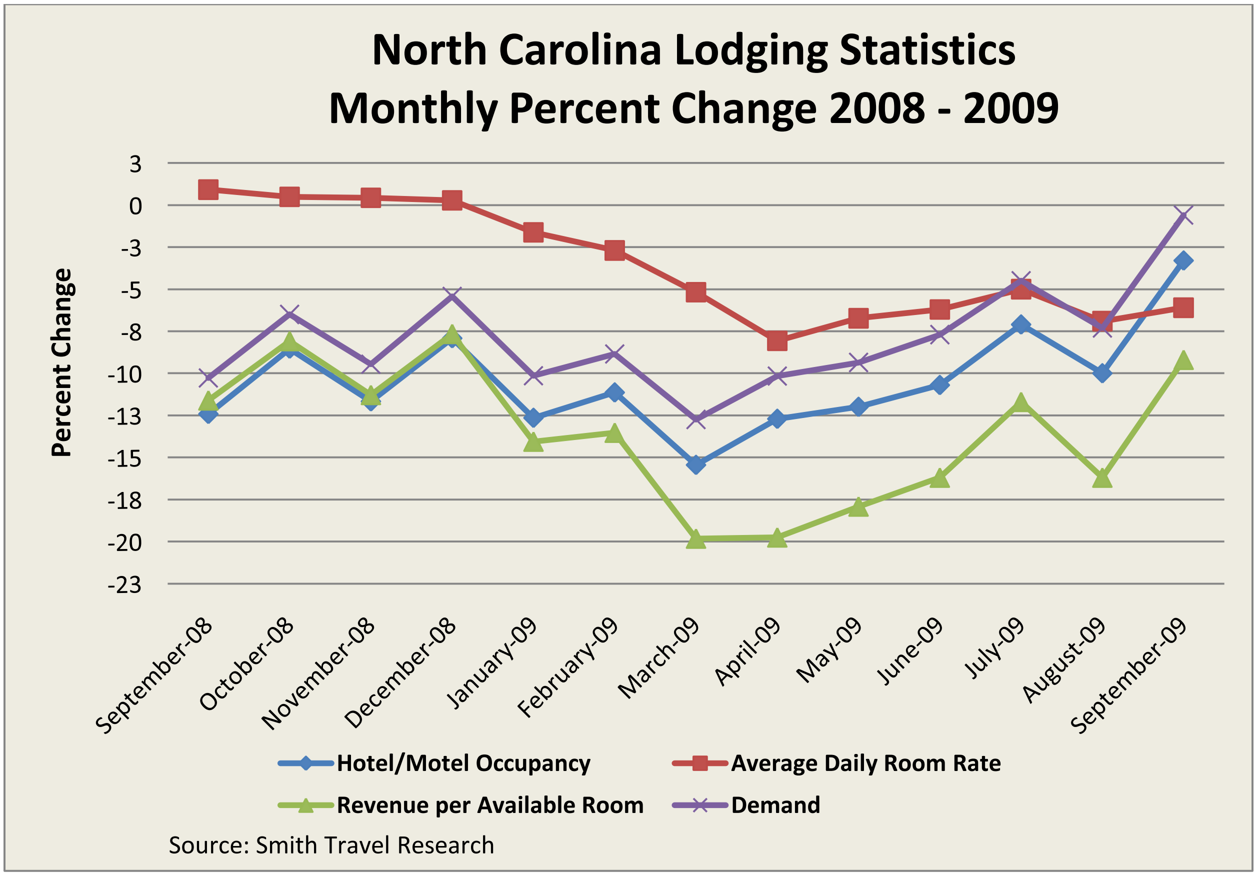


Chart 5 provides a monthly percent change for the four major lodging indicators. The chart allows for a 13 month trend-line analysis that clearly depicts that the major indicators show a steady negative change. All indicators have dropped to negative percent change since January of 2009. RevPAR is particularly low. However, in September, demand was almost up to a flat level from last year.

Chart 6 – Statewide Visitation to Attractions - September 2006 – 2009

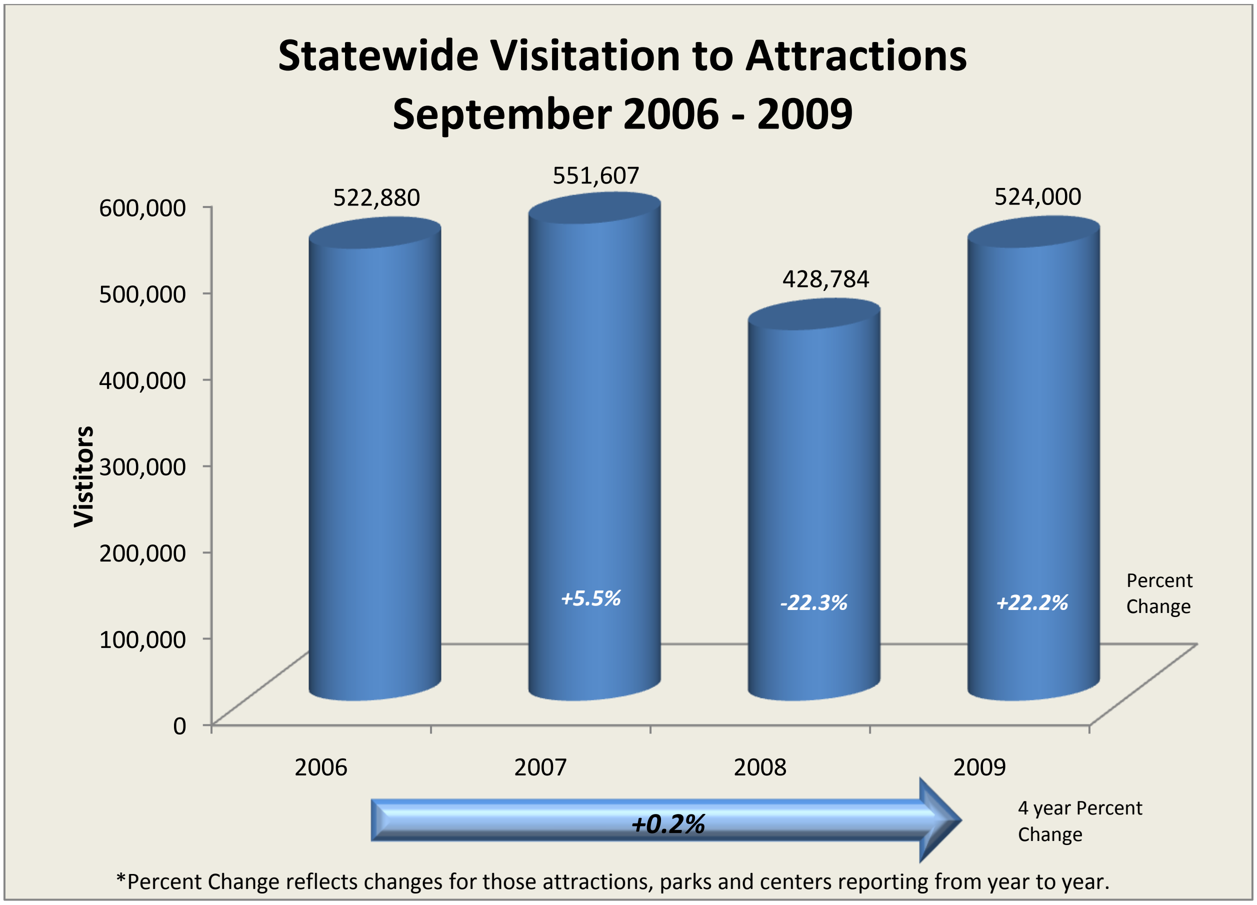


Chart 6 provides a status of the attractions industry in North Carolina for the month of September for the last four years. The numbers represent only a sample of North Carolina attractions that provide their attendance data, and are not intended to be considered a complete list of attractions. However, 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 September 2008 to September 2009.

Unlike the small decline in hotel/motel occupancy and demand during September 2009 (as shown in previous graphs), there was a twenty-two percent increase in attraction attendance for September 2009 from September 2008.

Chart 7 – Statewide Visitation to Attractions Monthly History 2006 – 2009

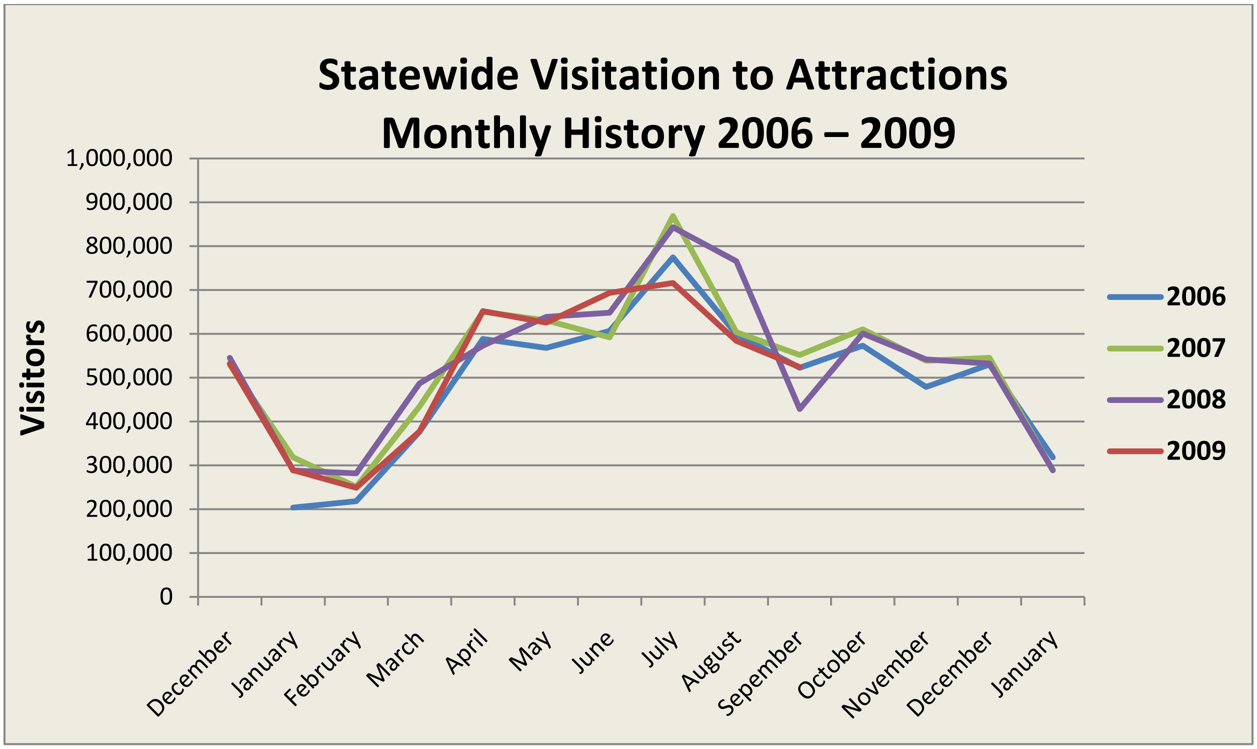


Chart 7 shows a monthly trend of attraction visitation for each of the last four years. This chart allows for a view of the ebb and flow of monthly attraction attendance, while also providing a look at how attendance compares to the same month of the previous years. Not surprisingly, the summer months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

The September numbers are slightly lower than 2007 levels, yet above 2008 numbers.

Chart 8 – State Welcome Center and Local Visitor Center Attendance - September 2006 – 2009

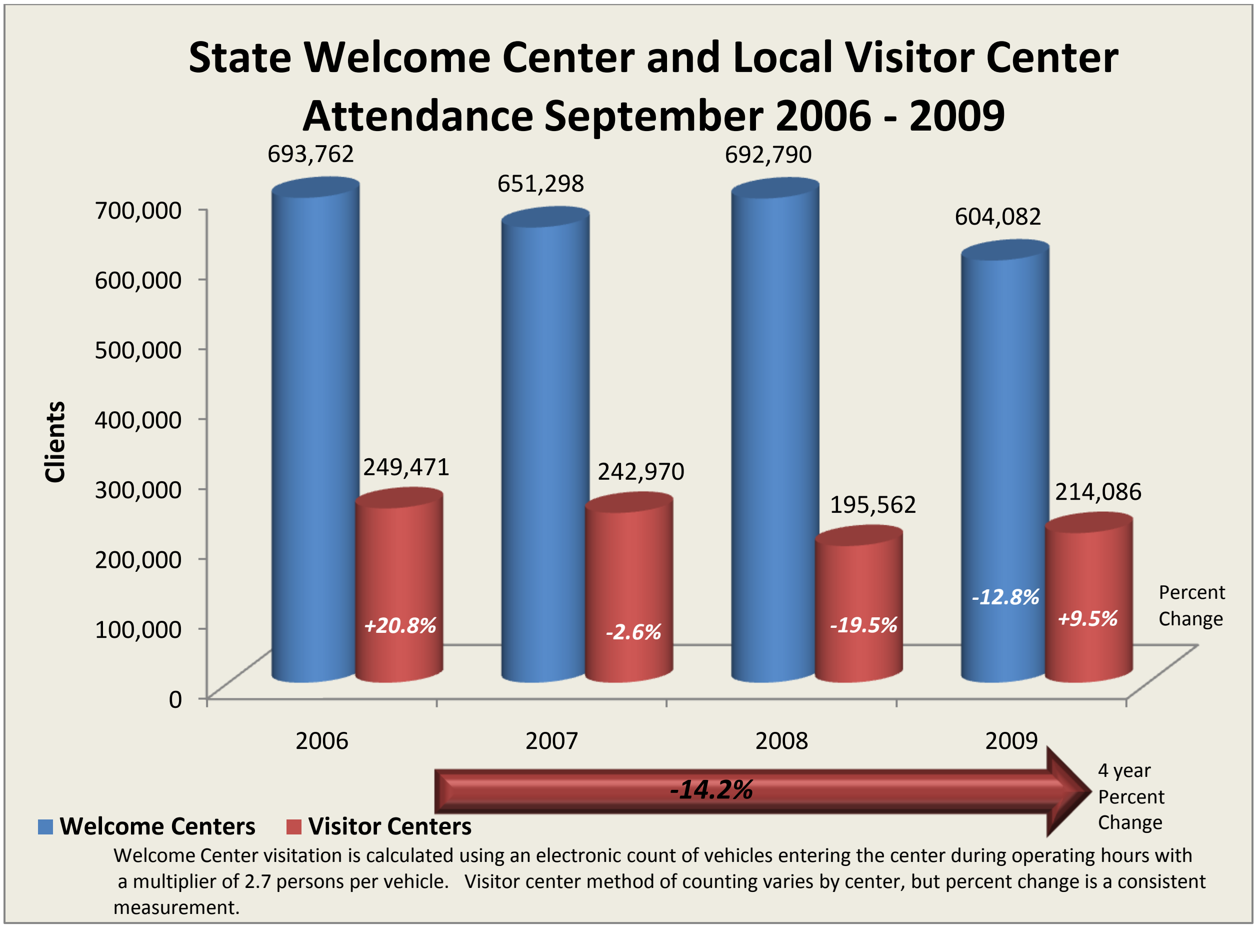


Chart 8 provides September visitation statistics for State Welcome Centers, as well as Local Visitor Centers throughout North Carolina. It should be noted that while there is a percent change indicated for welcome centers for 2007-2008 and 2008-2009, 2008 was the first year a percent change could accurately 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 September 2008. Therefore, previous years' percent changes are not included in this particular chart.

Chart 9 – Statewide National and State Park Visitation - September 2006 – 2009

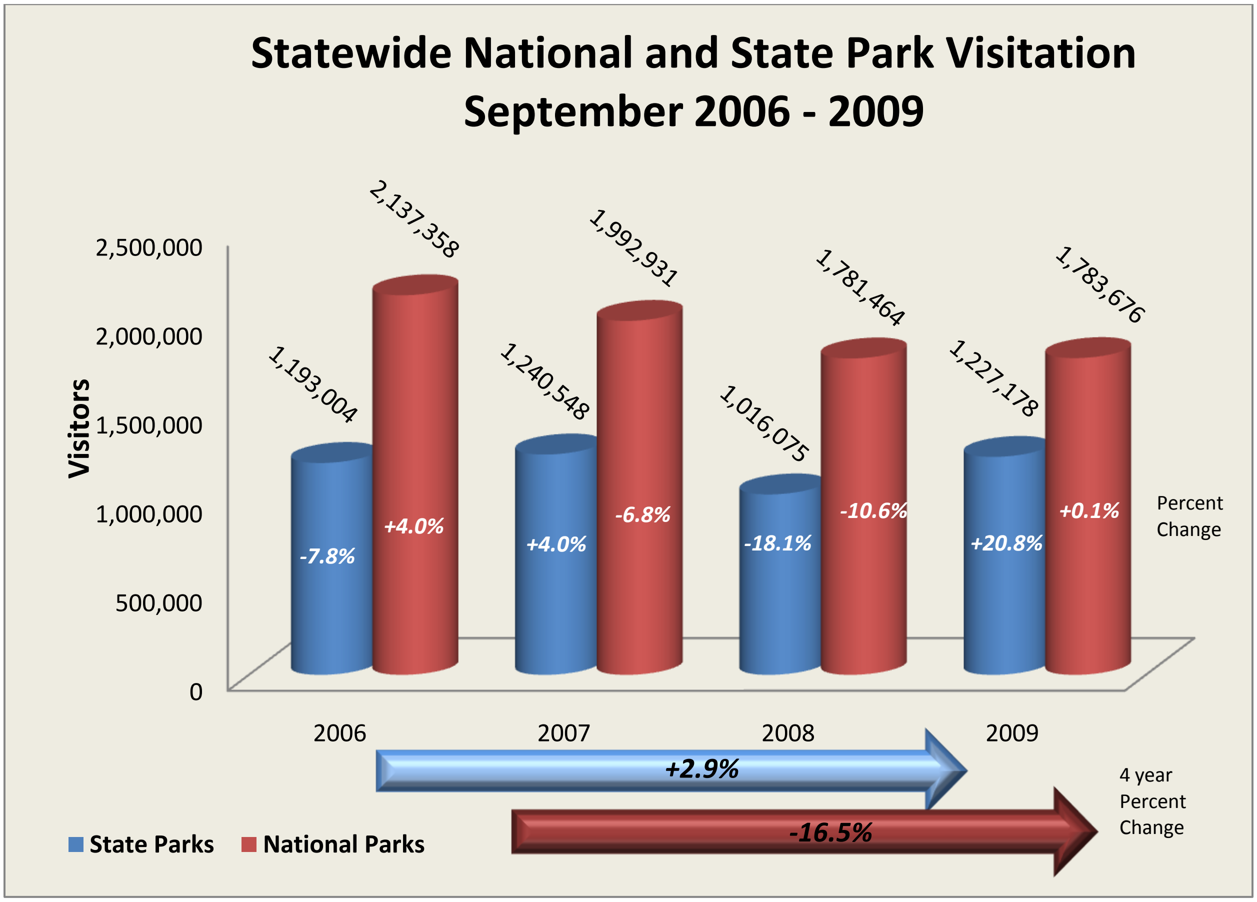
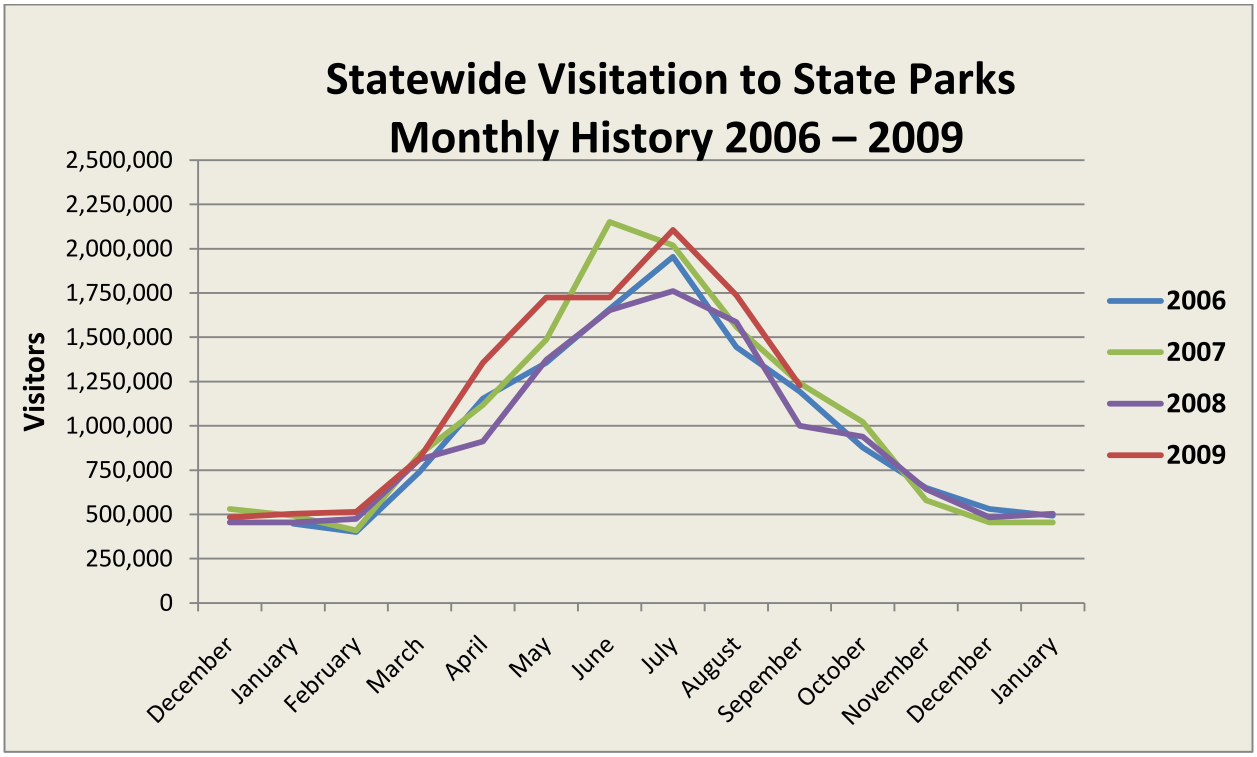


Chart 9 depicts visitation to state and national parks in North Carolina for the last four Septembers. State parks visitation has increased over the past year at a healthy rate. With an over twenty percent increase from September 2008, this data shows that the decrease in gasoline prices and the increase in travelers staying closer to home and looking for less expensive activities has had a positive impact on state park attendance. National parks attendance in the state increased very slightly from 2008, but still has a large decline over the four year period.

Chart 10 – Statewide Visitation to State Parks Monthly History 2006 – 2009



Similar to Chart 7, Charts 10 and 11 provide a monthly trend of state and national park visitation for each of the last four 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 – 2009

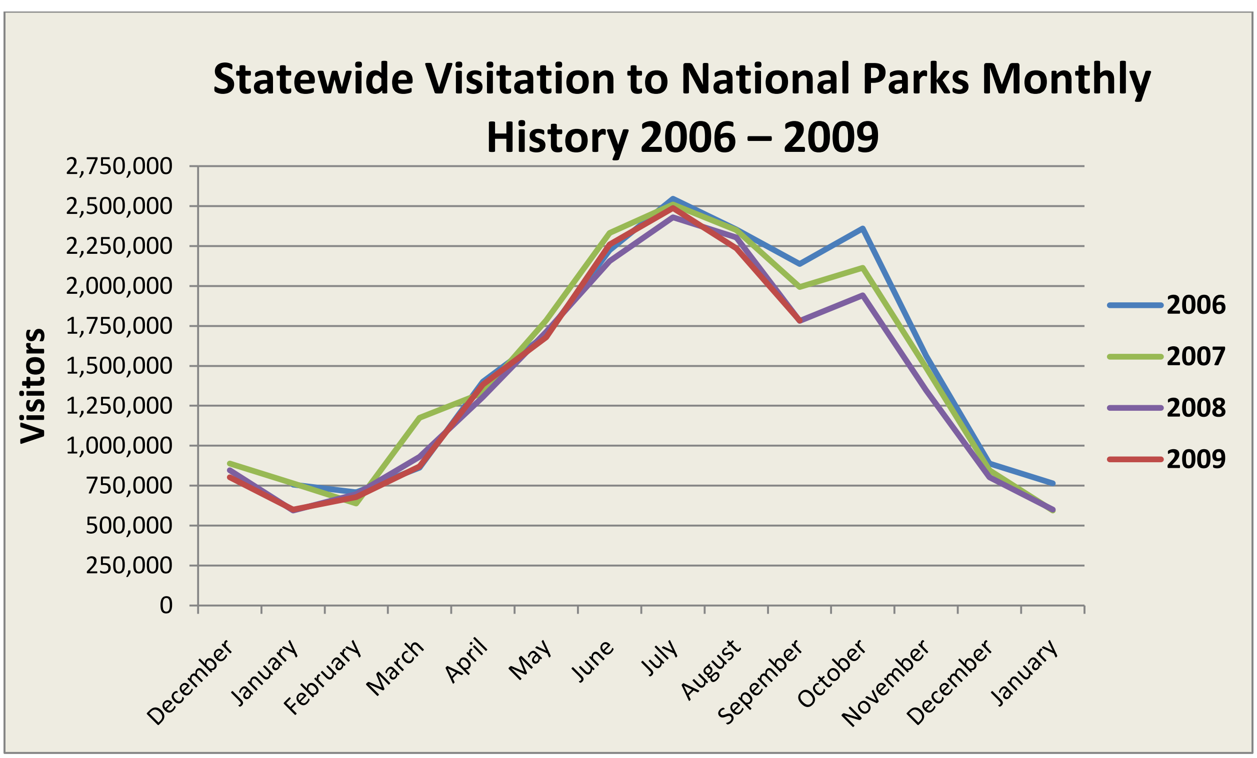


Chart 12 – Statewide Airport Arrivals and Departures - September 2006 – 2009

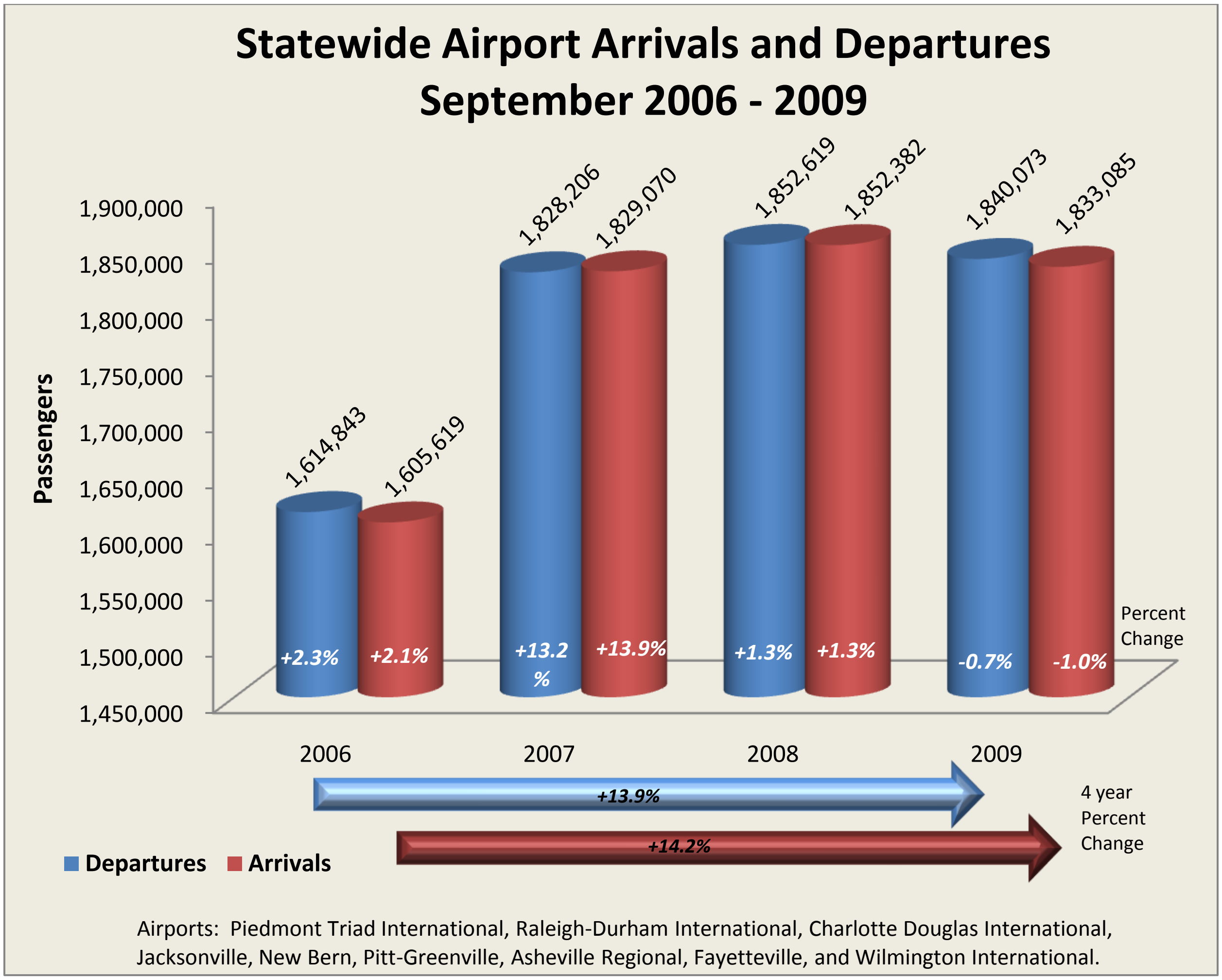


Chart 12 shows September airport arrivals and departures for each of the previous four years. There was a slight decrease for September arrivals and departures from 2008 to 2009. However, there has been a significant four-year increase in both.

Chart 13 – Lower Atlantic Average Monthly Retail Gas Prices for Unleaded – September 2006 – 2009

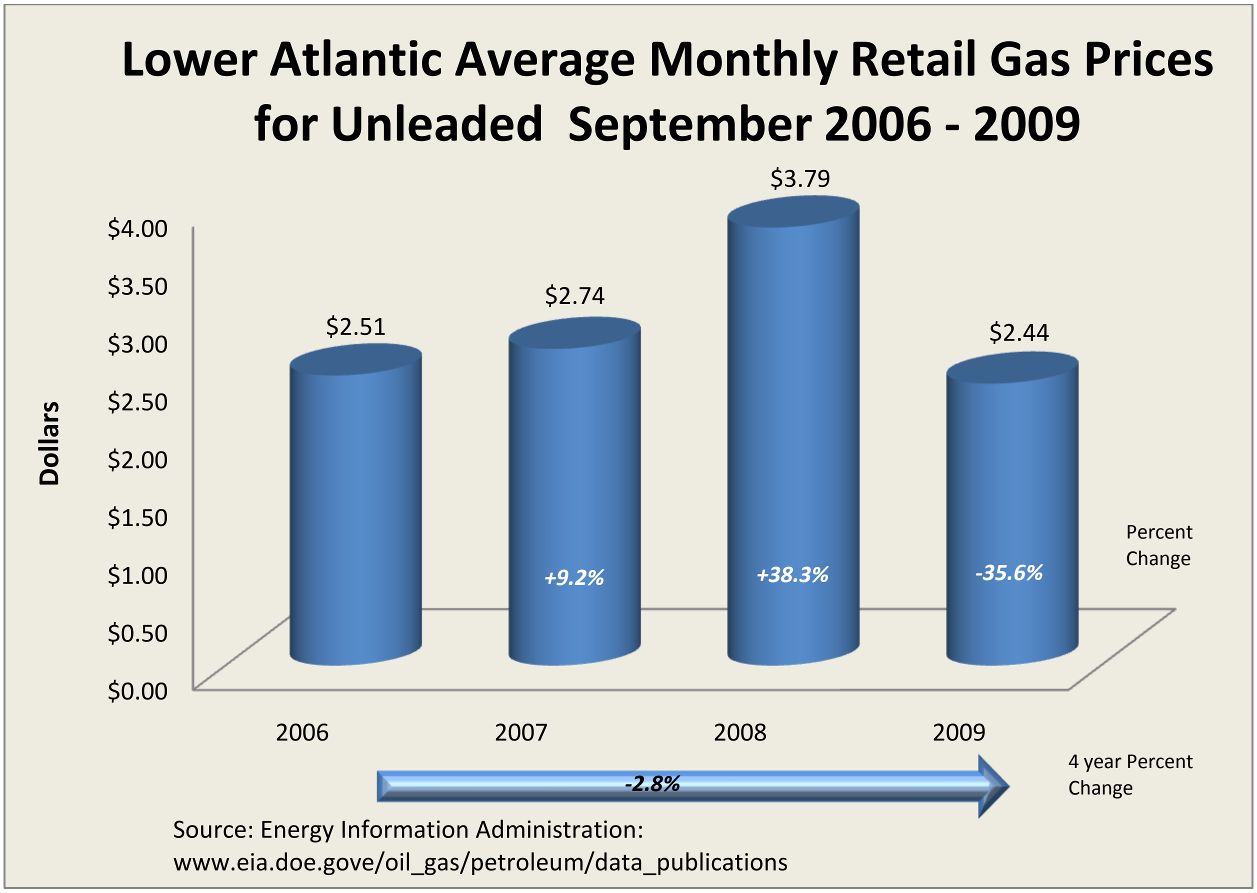


Chart 13 provides the average price per gallon of unleaded gasoline for September 2009 and the three previous Septembers. The data provided above, when compared with other indicators such as attraction attendance and visitor spending data, can be very helpful in the analysis of general travel trends. Fuel prices in September 2009 were the lowest in at least three years.

Chart 14 – North Carolina Average Temperature and Precipitation – September 2008 – 2009

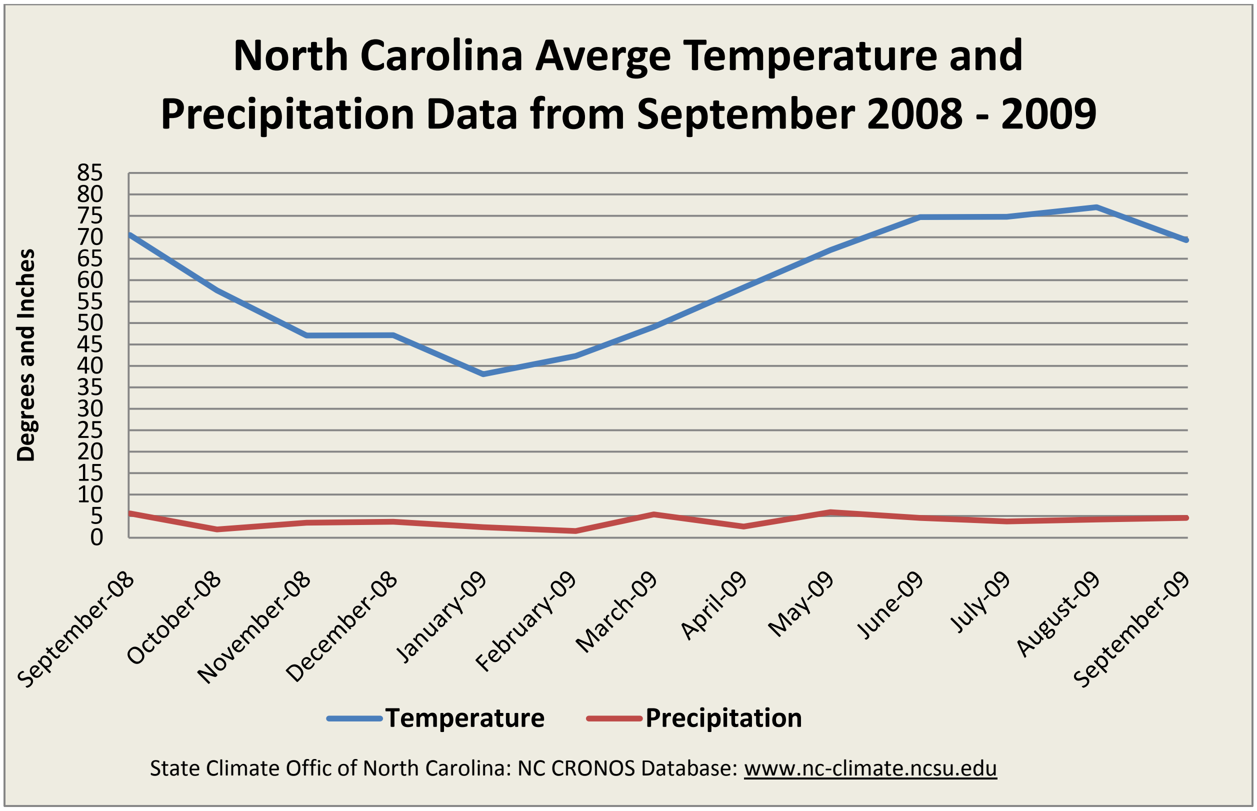


Chart 14 provides 13 months of air temperature and precipitation. This data, when analyzed together with gas price data and other tourism indicators, can be valuable in determining possible reasons for significant increases and/or decreases in indicators. For instance, greater than normal precipitation during a particular month can often help explain decreases in attendance at outdoor attractions. September 2009 had a lower precipitation than last September, and a slightly lower temperature.

Section 2 – Geographic Marketing Region (Coastal/Piedmont/Mountain) Tourism Indicator Analysis for September 2009

Chart 15 – Hotel/Motel Statistics by Geographic Region - September 2009

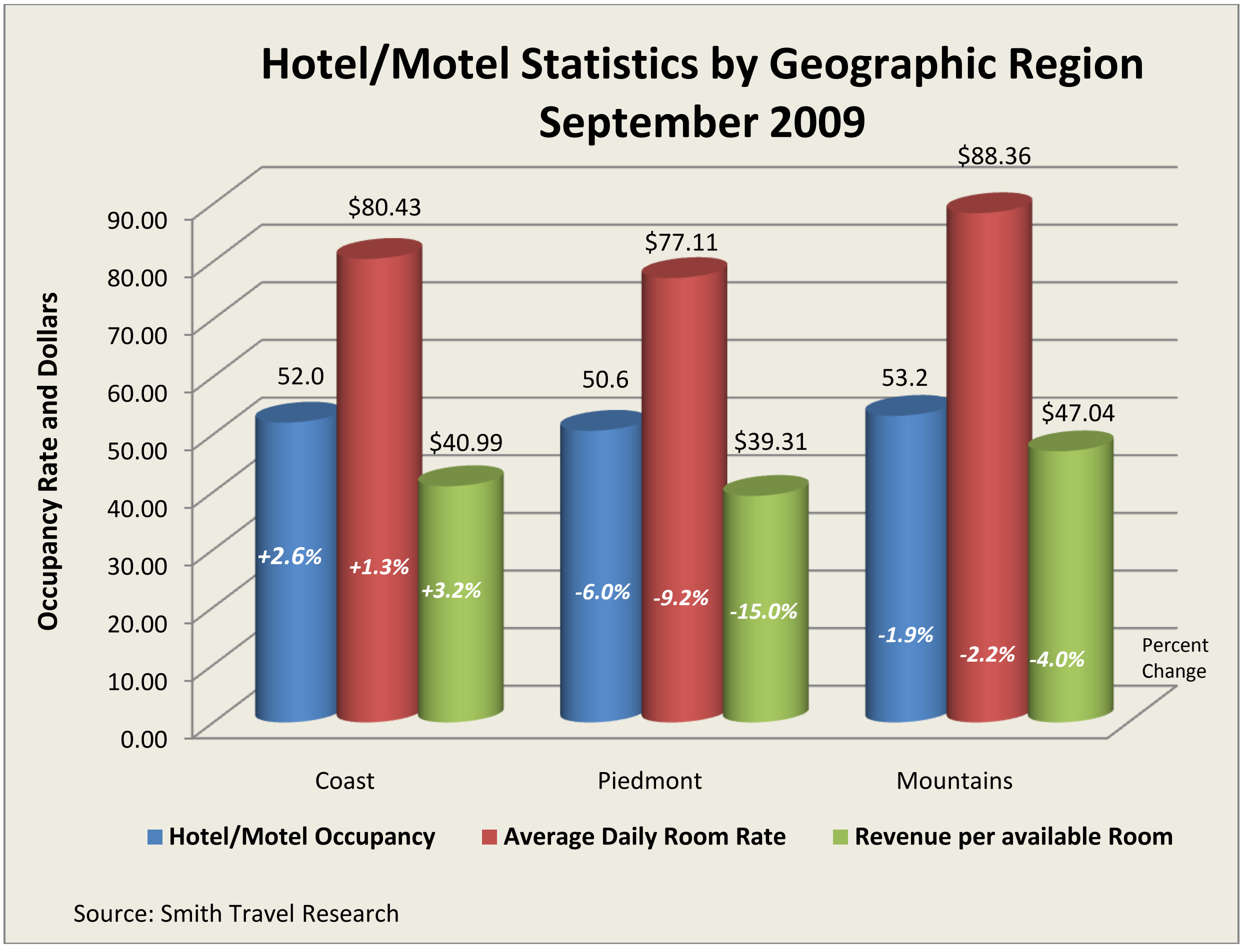


Chart 15 provides a one year comparison in lodging statistics for the three geographic marketing regions of North Carolina. Occupancy rate in 2009 decreased the Piedmont and Mountain regions, but the Coastal Region had an increase in occupancy levels from September 2008. That region also saw an increase in ADR and RevPAR from last year.

Chart 16 – Hotel/Motel Room Demand by Geographic Region - September 2009

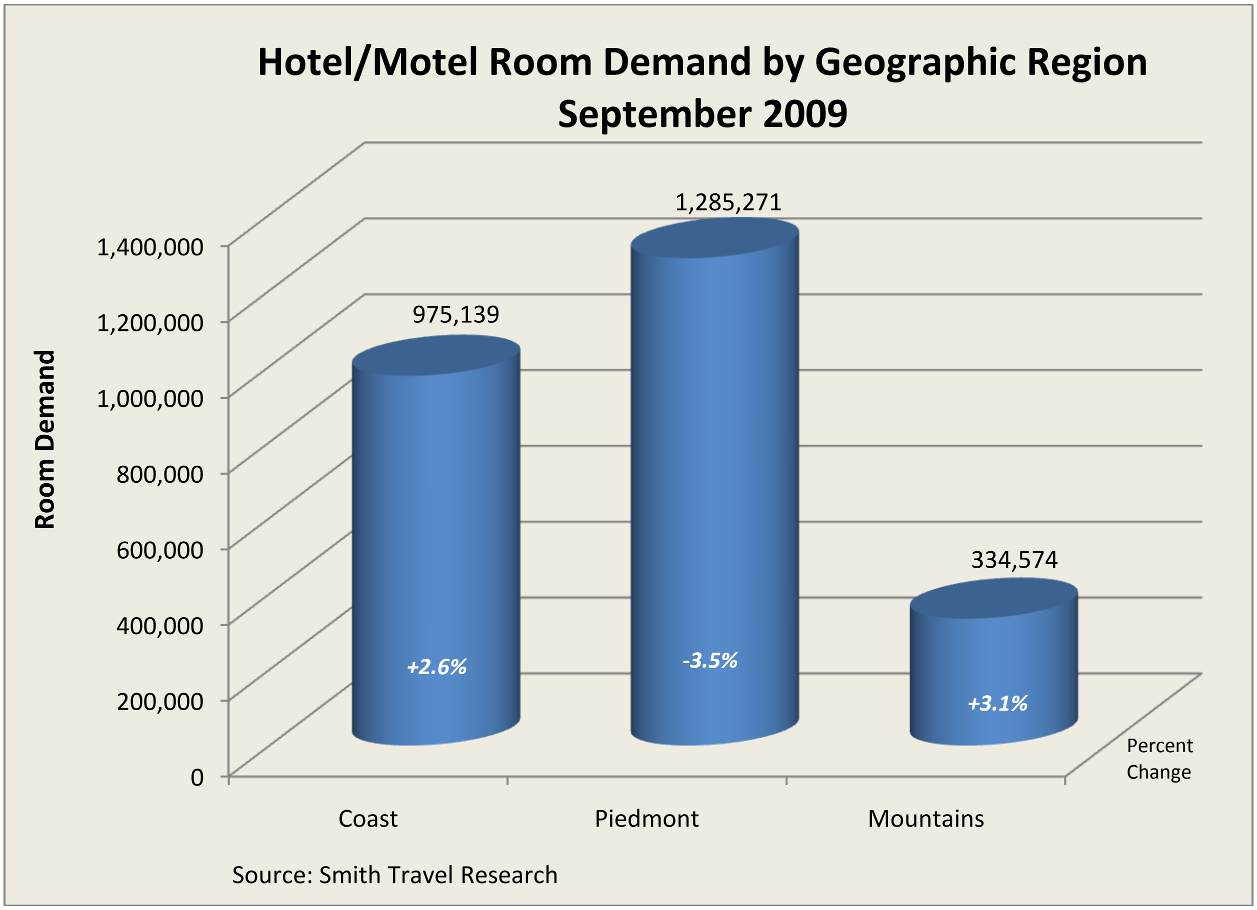


Chart 16 provides hotel/motel demand by geographic region for September 2009. Demand differs from occupancy in that it is the total number of rooms sold, not accounting for differences in room supply. The Mountain Region experienced the largest percent change in demand from September 2008 to September 2009.

Chart 17 – Visitation to Attractions and Parks by Geographic Region – September 2009

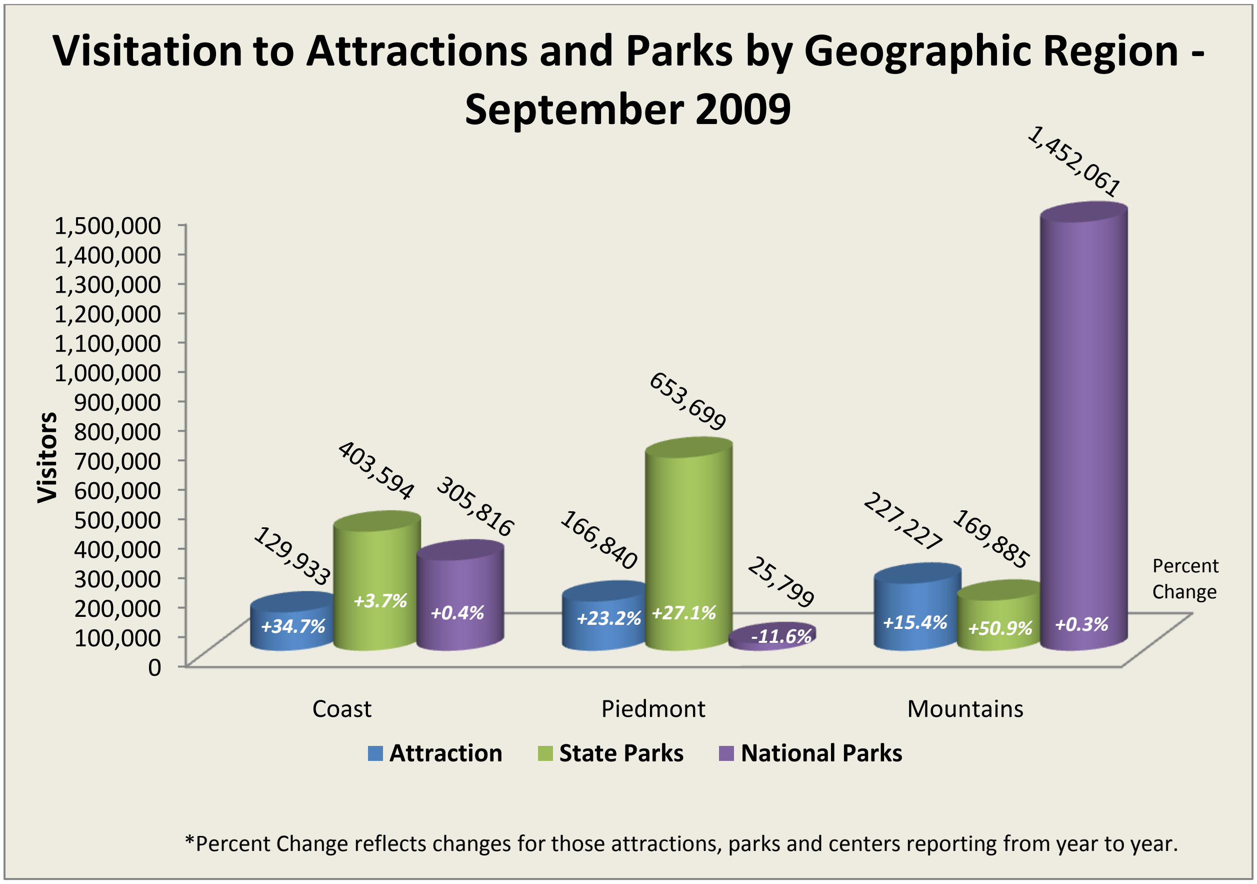


Chart 17 provides a look at the attractions industry in North Carolina in September 2009 by geographic region. As with the statewide numbers, the following data represents only a sample of North Carolina attractions that provide their attendance data, and are not intended to be considered a complete 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.

There was an overall increase in visitation for attractions and state parks in all regions in September 2009. State parks visitation was flat in the coast and mountains, but down in the piedmont.

Chart 18 – State Welcome Center and Local Visitor Center Attendance by Geographic Region – September 2009

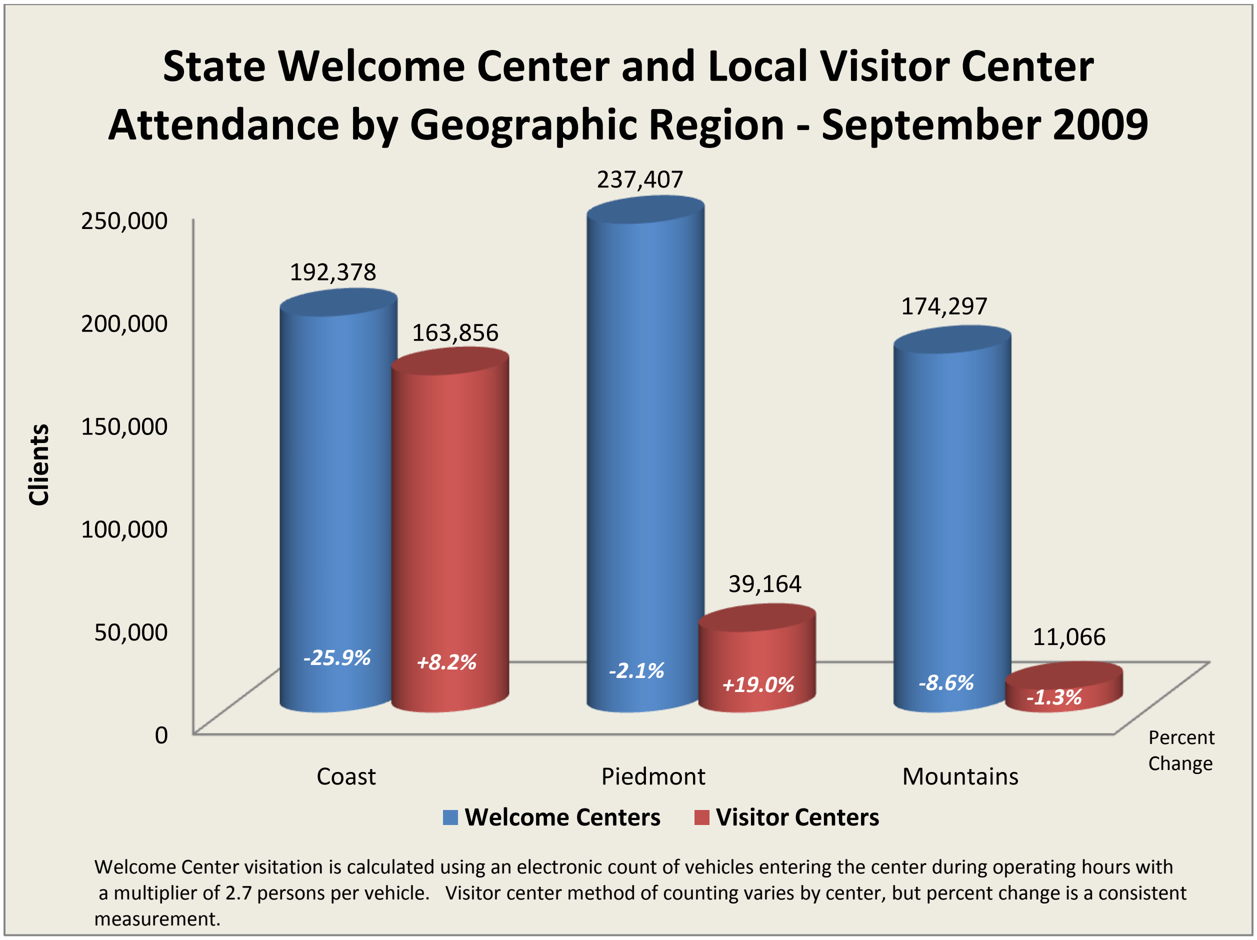


Chart 18 shows welcome center and visitor center attendance by geographic region and offers comparisons from September 2008. Each region experienced declines in welcome center numbers in September, while the visitor centers in the coast and piedmont saw healthy increases.

Chart 19 – Airport Arrivals and Departures by Geographic Region – September 2009

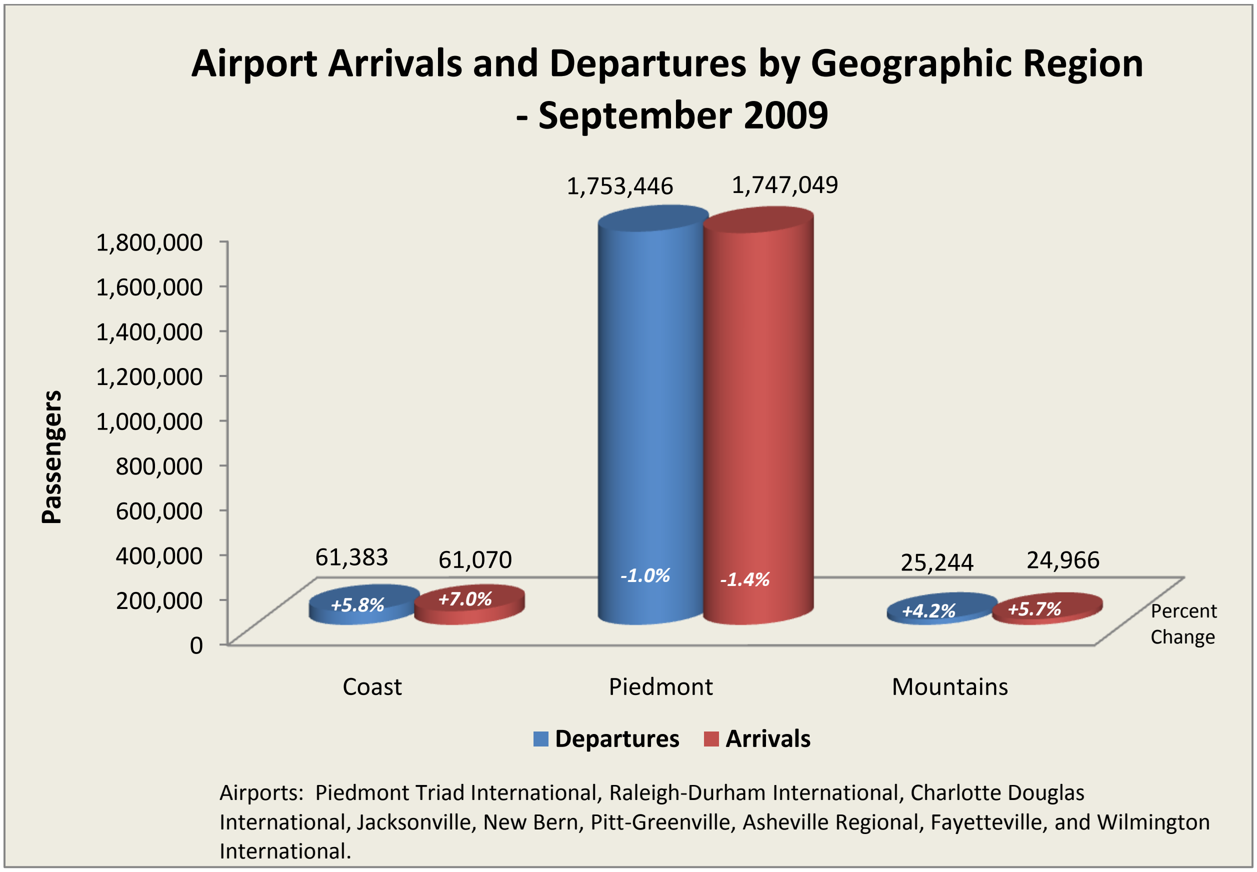


Chart 19 provides a breakdown of air travel statistics by geographic region. While the majority of air traffic is through the Piedmont Region, it is helpful to maintain a trend of other regional airport usage. The Piedmont Region experienced a slight drop in air traffic during the month of September, while the Coastal and Mountain Region experienced increases.

Section 3: Economic Development Region Tourism Indicator Analysis - September 2009

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 - September 2009

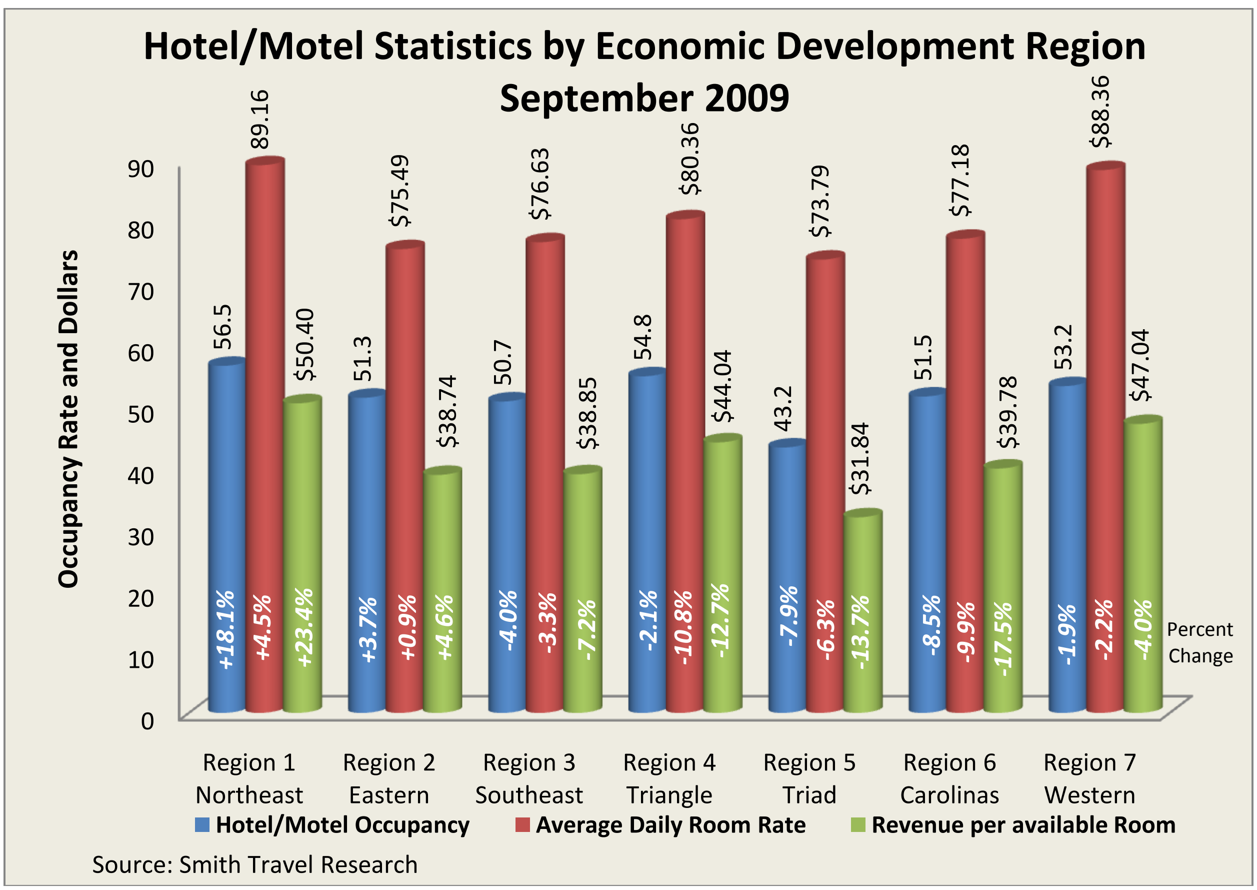


Chart 20 provides lodging indicators for September 2009 by economic development region. Also shown are percent changes from September 2008. This graph allows individual regions within the state to track indicators specific to their general destinations, while still being able to compare their data to the state data shown in Section 1.

Chart 21 – Hotel/Motel Room Demand by Economic Development Region - September 2009

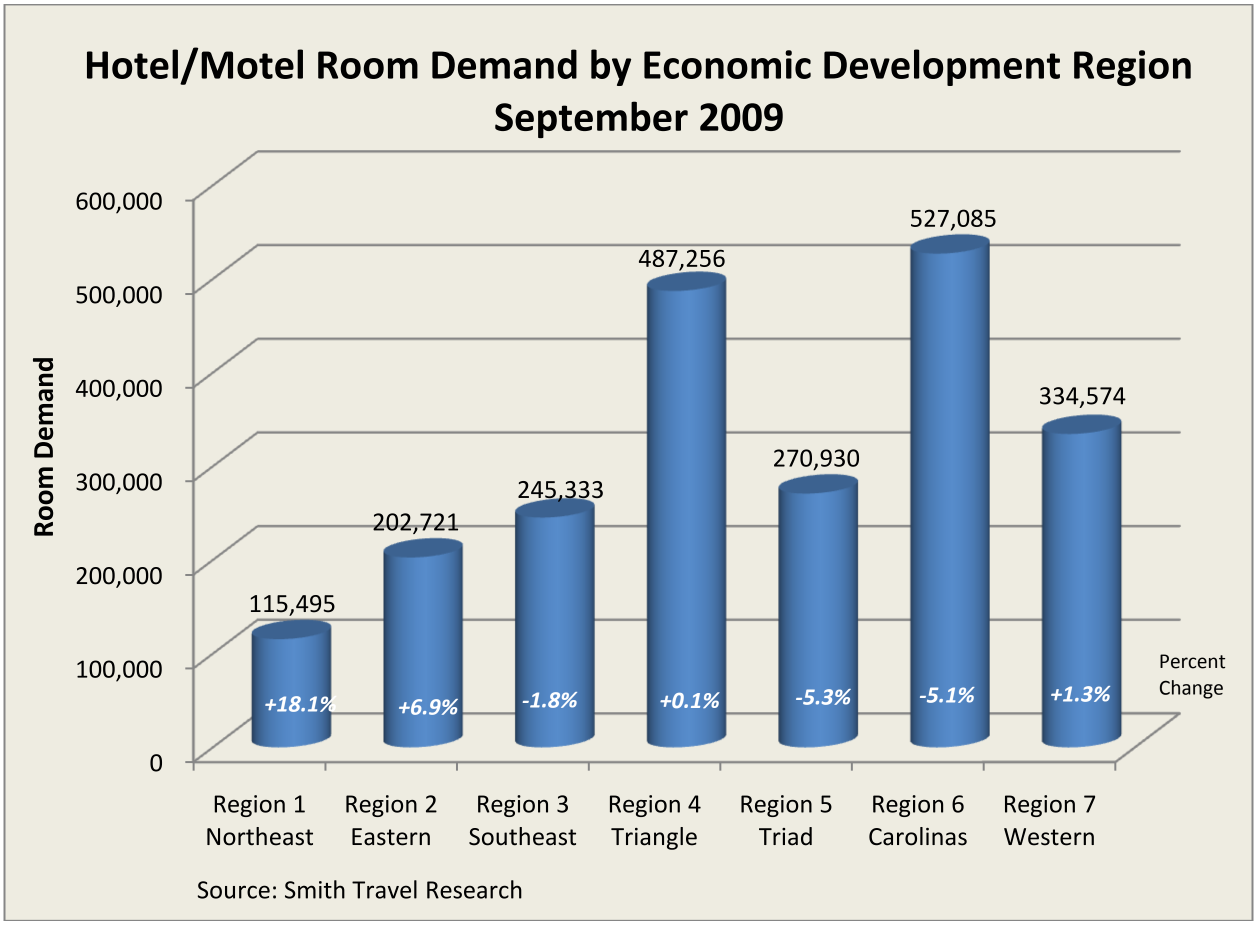


Chart 21 depicts hotel/motel demand for the month of September 2009 by economic development region. Demand is the number of rooms sold excluding complimentary rooms.

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 22 – National Travel Price Index December 2006 – August 2009

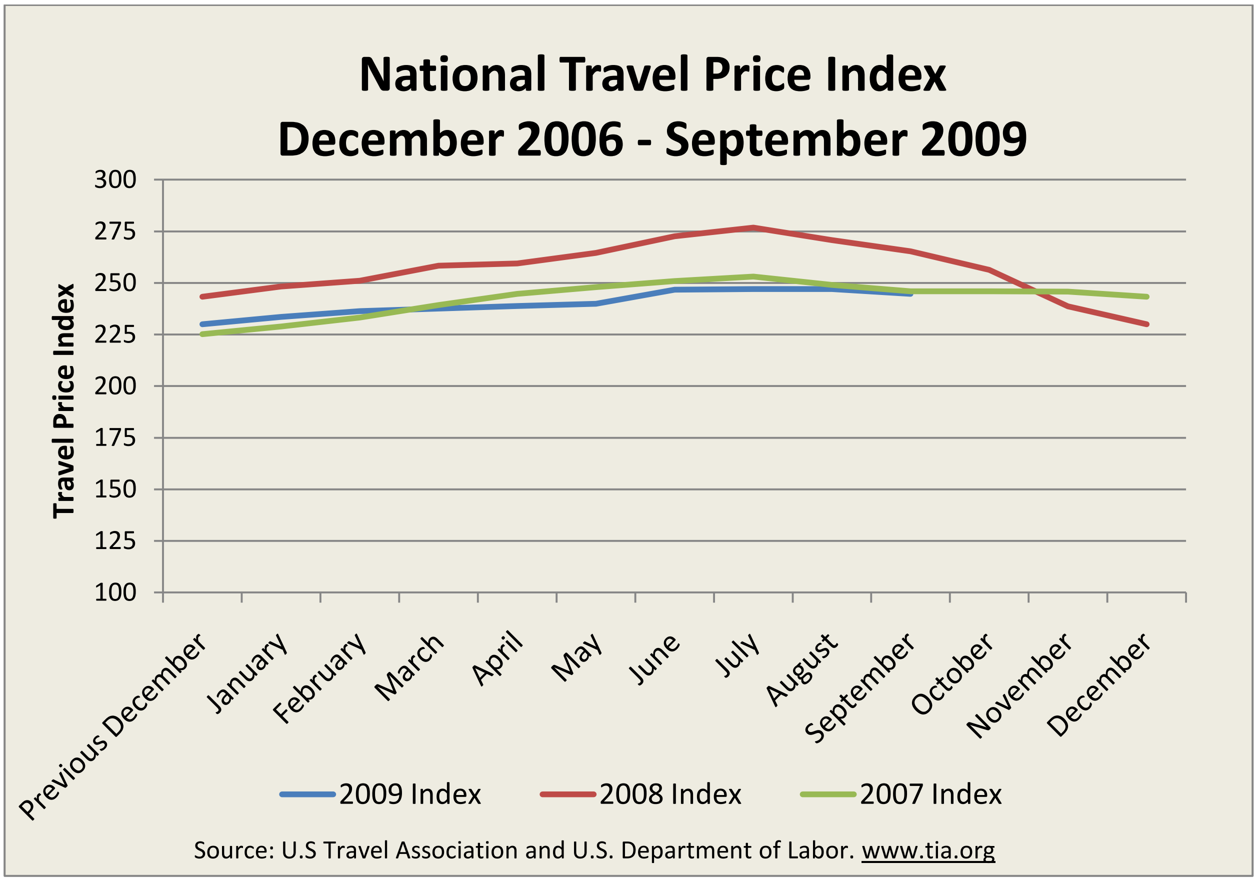


Chart 22 provides a two year trend of the National Travel Price Index (TPI). Steady growth was experienced through mid-2008; however in November 2008, it is clear that as the TPI fell below 2007 levels, the tourism industry began feeling the full effect of the recession. Into 2009, the TPI remained well below the 2008 index level and is remaining slightly below the 2007 level after dropping below in March.