



November 2012

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 2012

Chart 1 – Hotel/Motel Occupancy in North Carolina - November 2006 – 2012

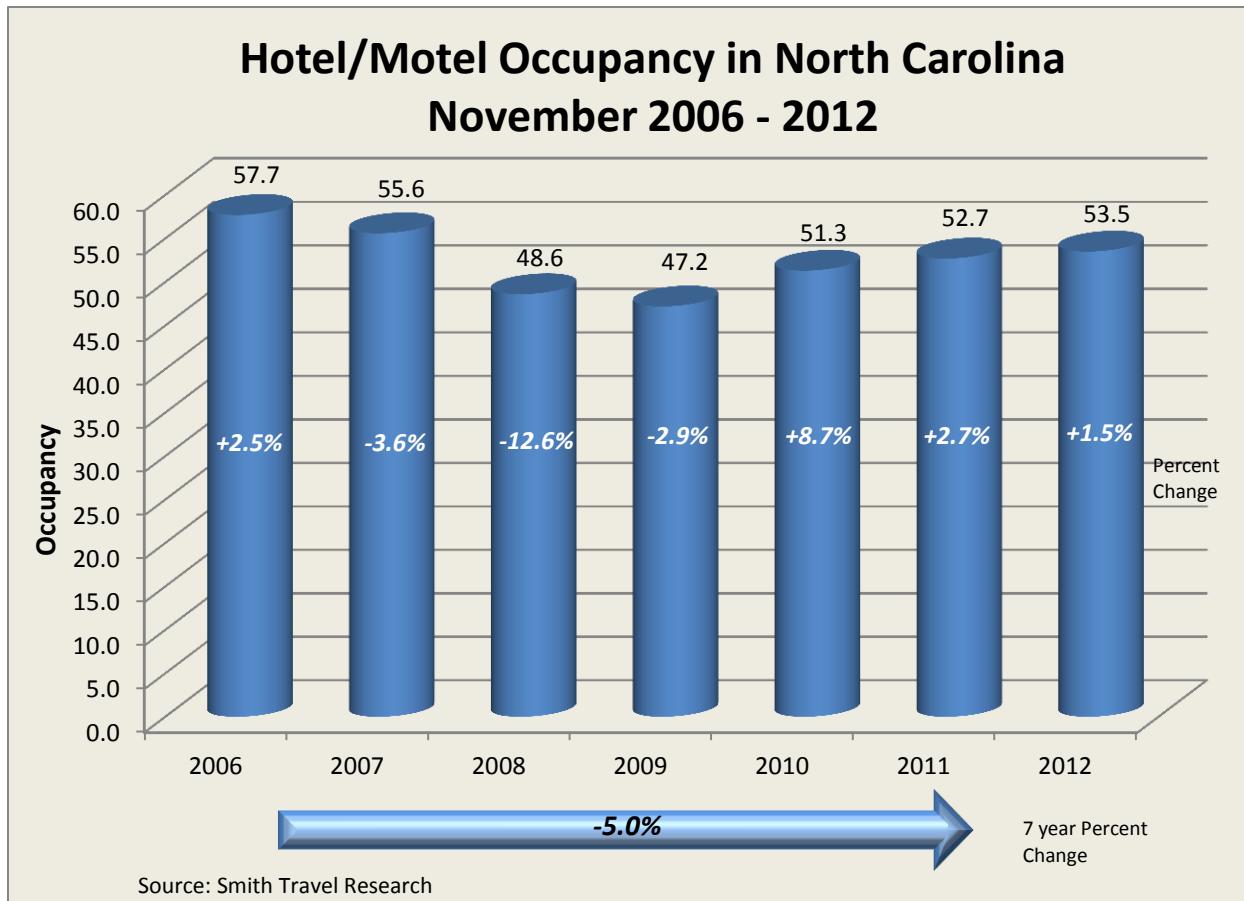


Chart 1 provides a comparison over a seven year period to show the trend of occupancy in the state for the month of November. Occupancy for November 2012 was up 1.5 percent from November 2011. At 53.5, occupancy for the month was the highest since 2007. *Occupancy at the national level increased by 1.8 percent in November 2012 from the previous year.*

Chart 2 – Hotel/Motel Average Daily Room Rate in North Carolina - November 2006 – 2012

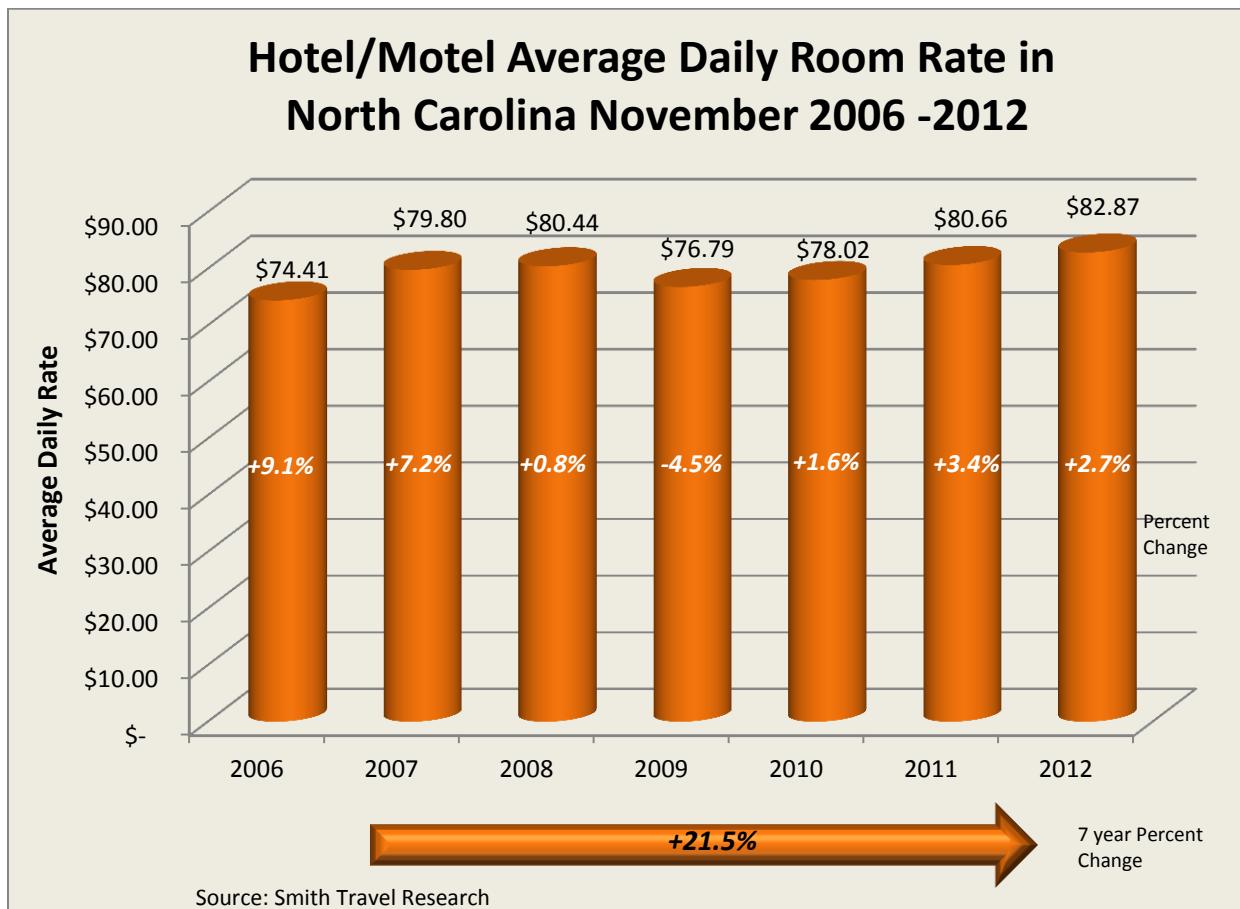
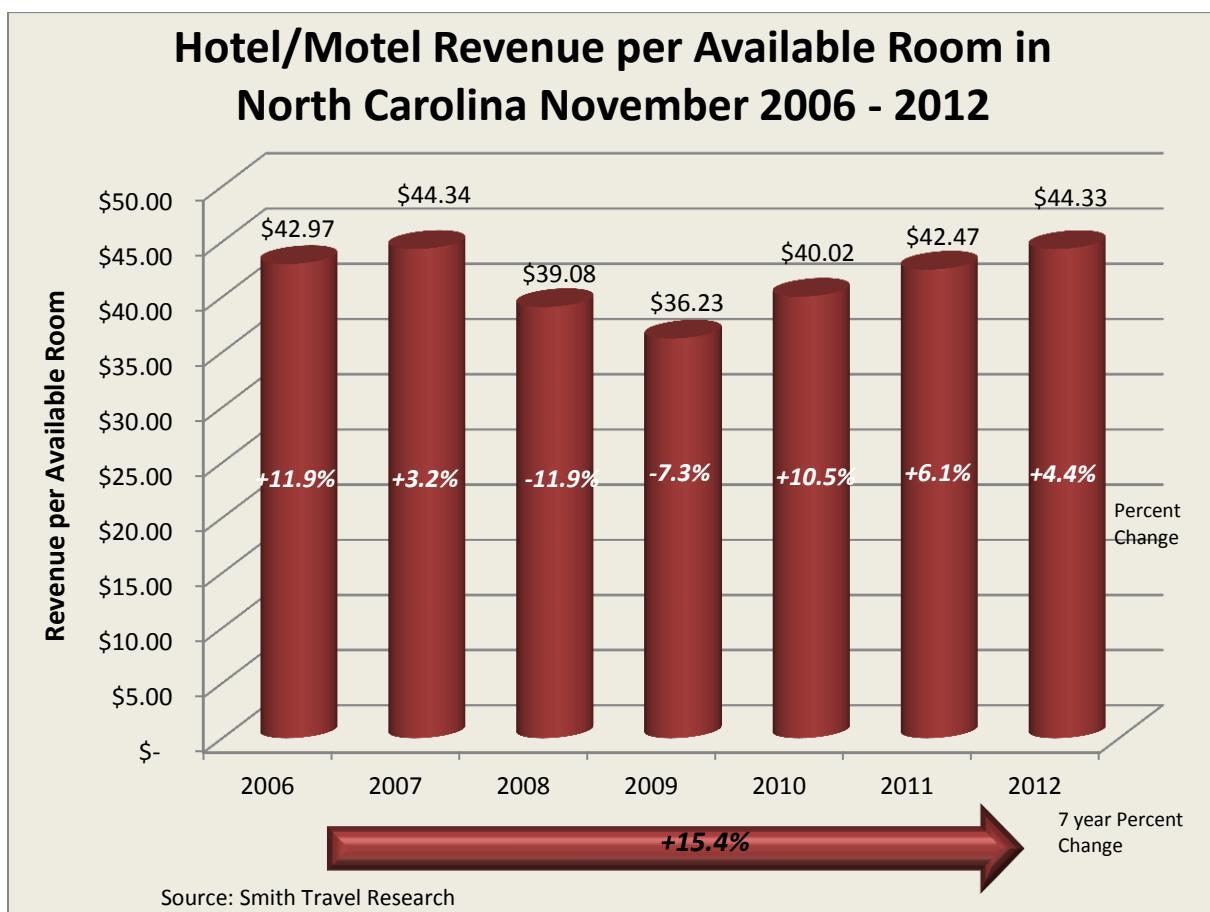


Chart 2 provides a comparison over a seven year period to show the trend of average daily room rate (ADR) in the state for the month of November. ADR increased nearly three percent in November, and is up over twenty percent over the last seven years. *ADR at the national level was up 3.5% in November 2012 from the previous November.*

Chart 3 – Hotel/Motel Revenue per Available Room in North Carolina - November 2006 – 2012



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 November. RevPAR was up over four percent in November 2012. *RevPAR at the national level was up 5.4% in November 2011 from the previous November.*

Chart 4 – Hotel/Motel Room Demand in North Carolina – November 2006 – 2012

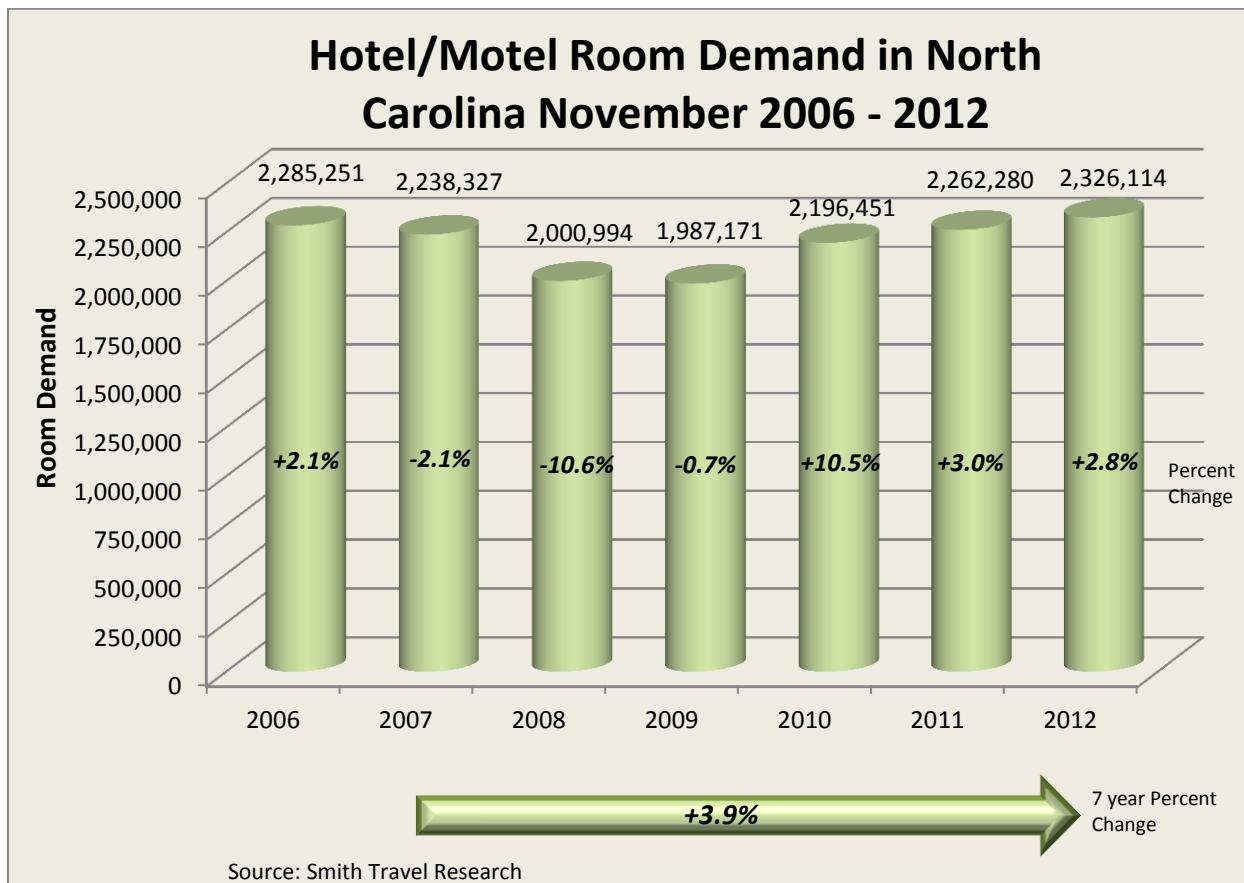


Chart 4 depicts hotel/motel demand for the month of November 2012 with comparisons to the previous six years. Demand is the number of rooms sold excluding complimentary rooms. Room demand for November was at a record high this year with over 2.3 million rooms, 2.8% greater than 2011 and 3.9% greater than the previous record set in 2006. *Room demand at the national level saw an increase of 2.5% change in November 2011 from the previous November.*

Chart 5 – North Carolina Lodging Statistics Monthly Percent Change 2008 – 2012

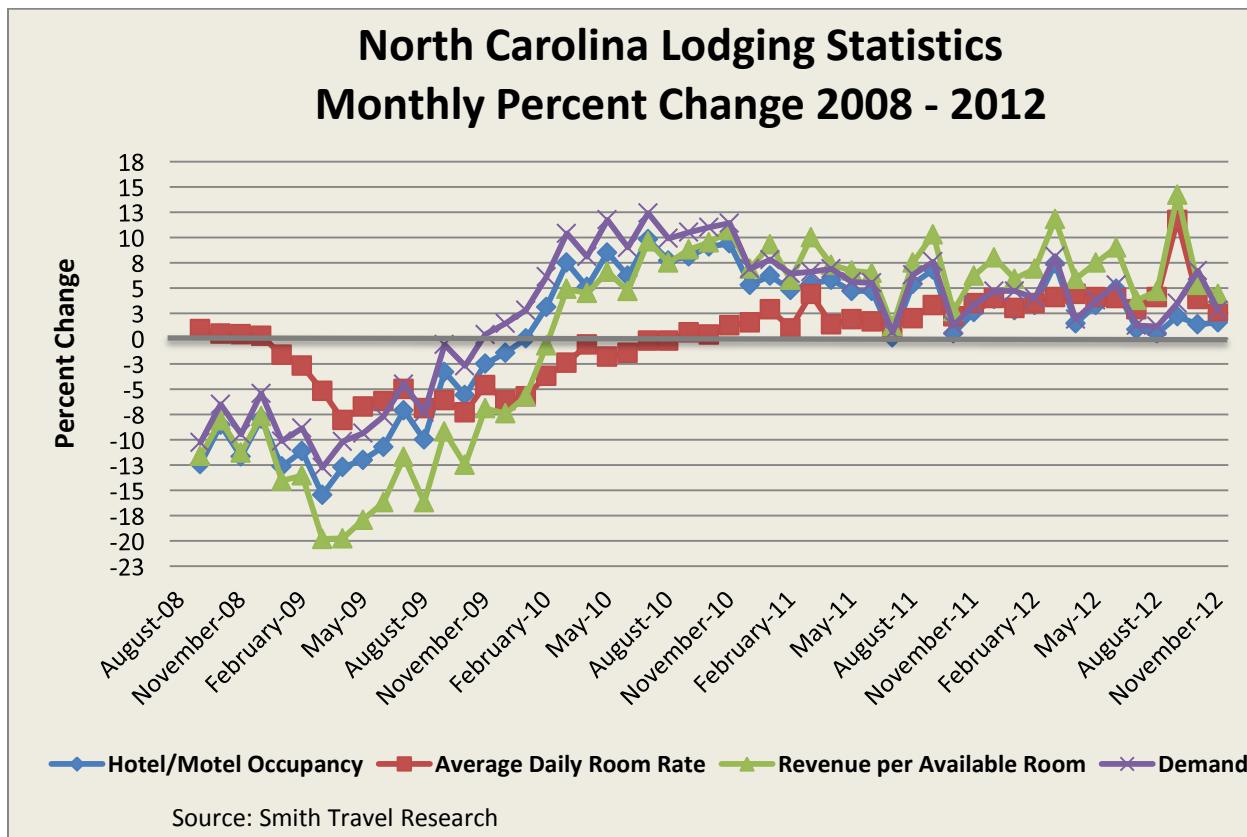


Chart 5 provides a monthly percent change for the four major lodging indicators. The chart allows for a three year trend-line analysis that clearly depicts that the major indicators have shown a steady positive change since early 2010 and still remain in the positive range.

Chart 6 – Statewide Visitation to Attractions – November 2006 – 2012

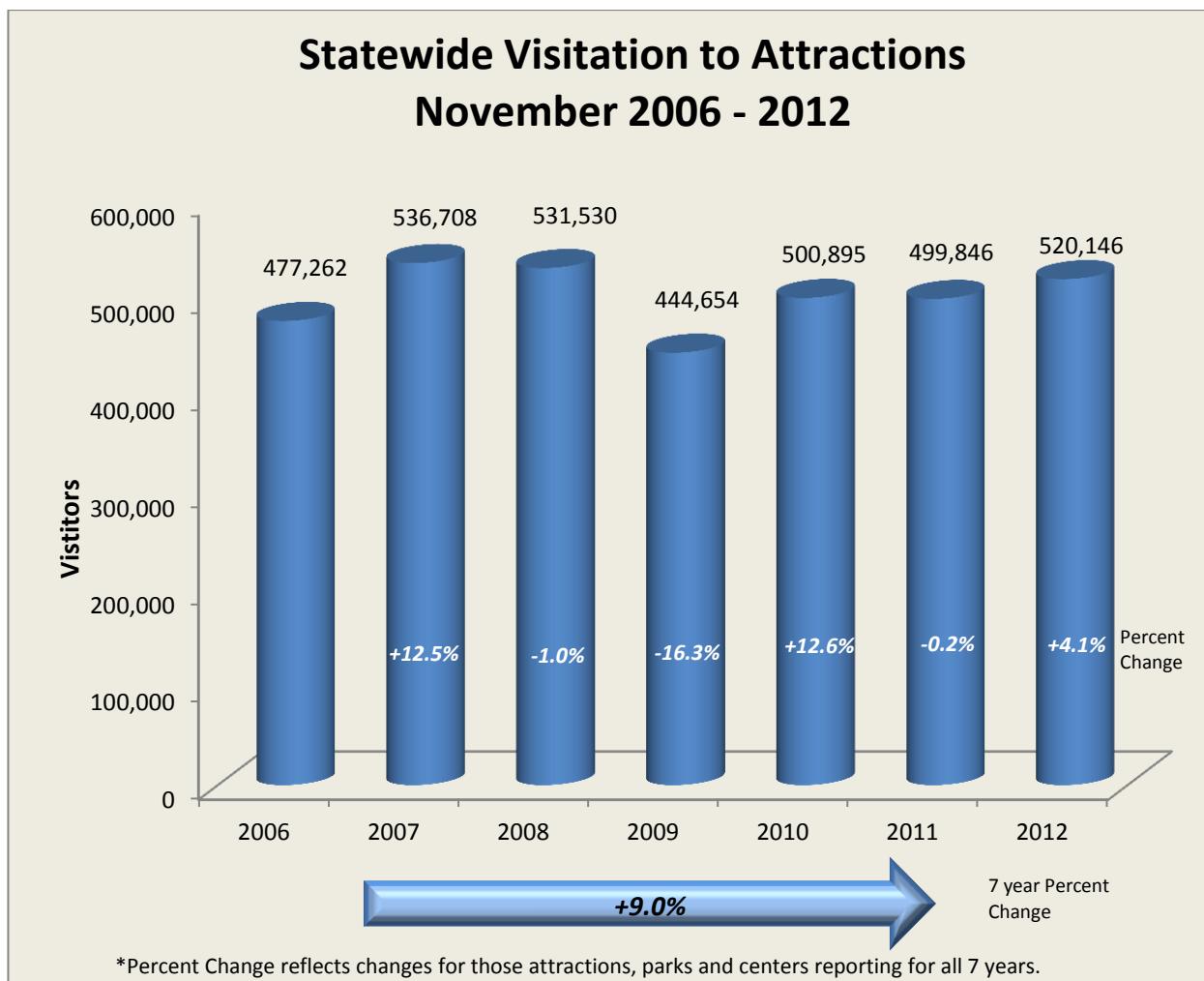


Chart 6 provides a status of the attractions industry in North Carolina for the month of November for the last seven years. The numbers represent only a sample of North Carolina attractions that provide their attendance data, and are not intended to be considered a complete list of attractions. However,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

November attraction attendance was up about four percent from 2011, and the highest since 2008 for the month. November attraction attendance has increased nine percent since 2006.

Chart 7 – Statewide Visitation to Attractions Monthly History 2006 – 2012

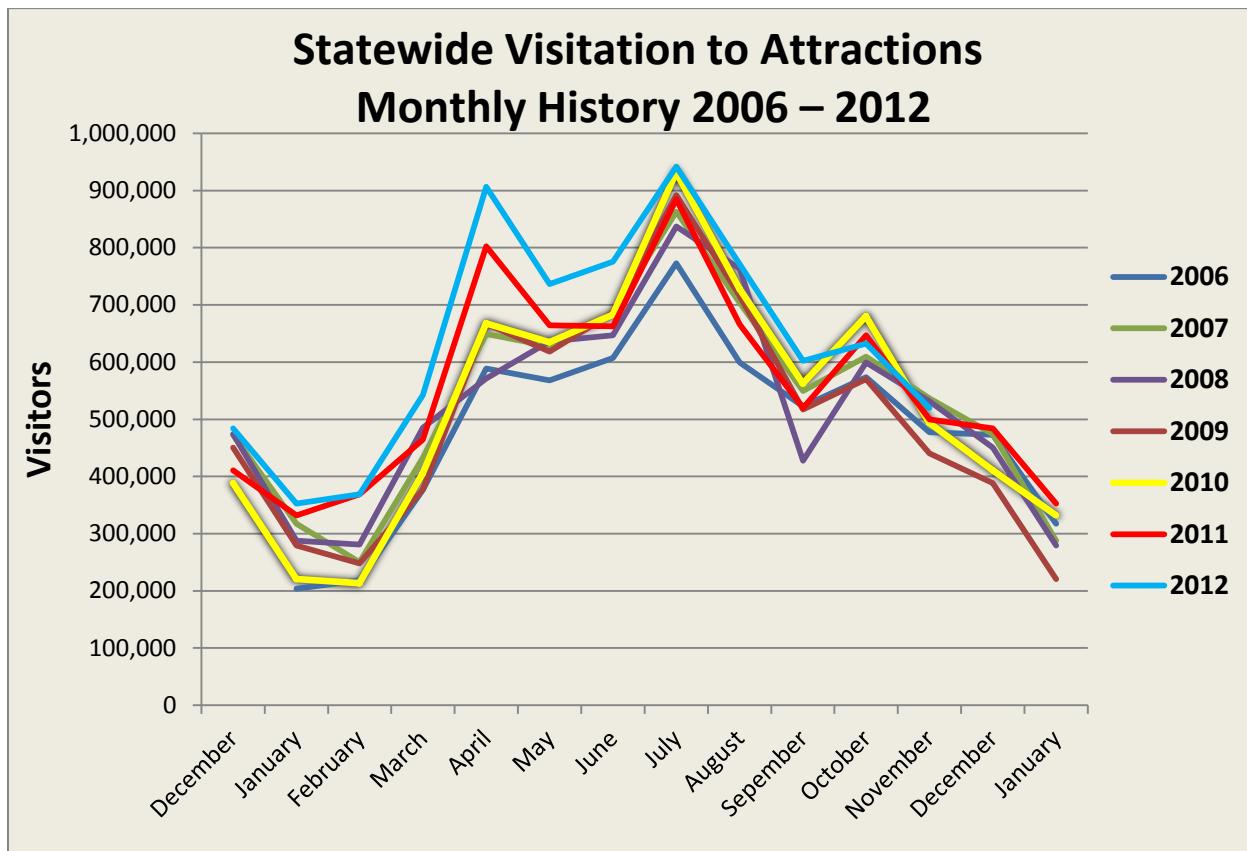


Chart 7 shows a monthly trend of attraction visitation for each of the last seven years. This chart allows for a view of the ebb and flow of monthly attraction attendance, while also providing a look at how attendance compares to the same month of the previous years. Not surprisingly, the winter months 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 2006 – 2012

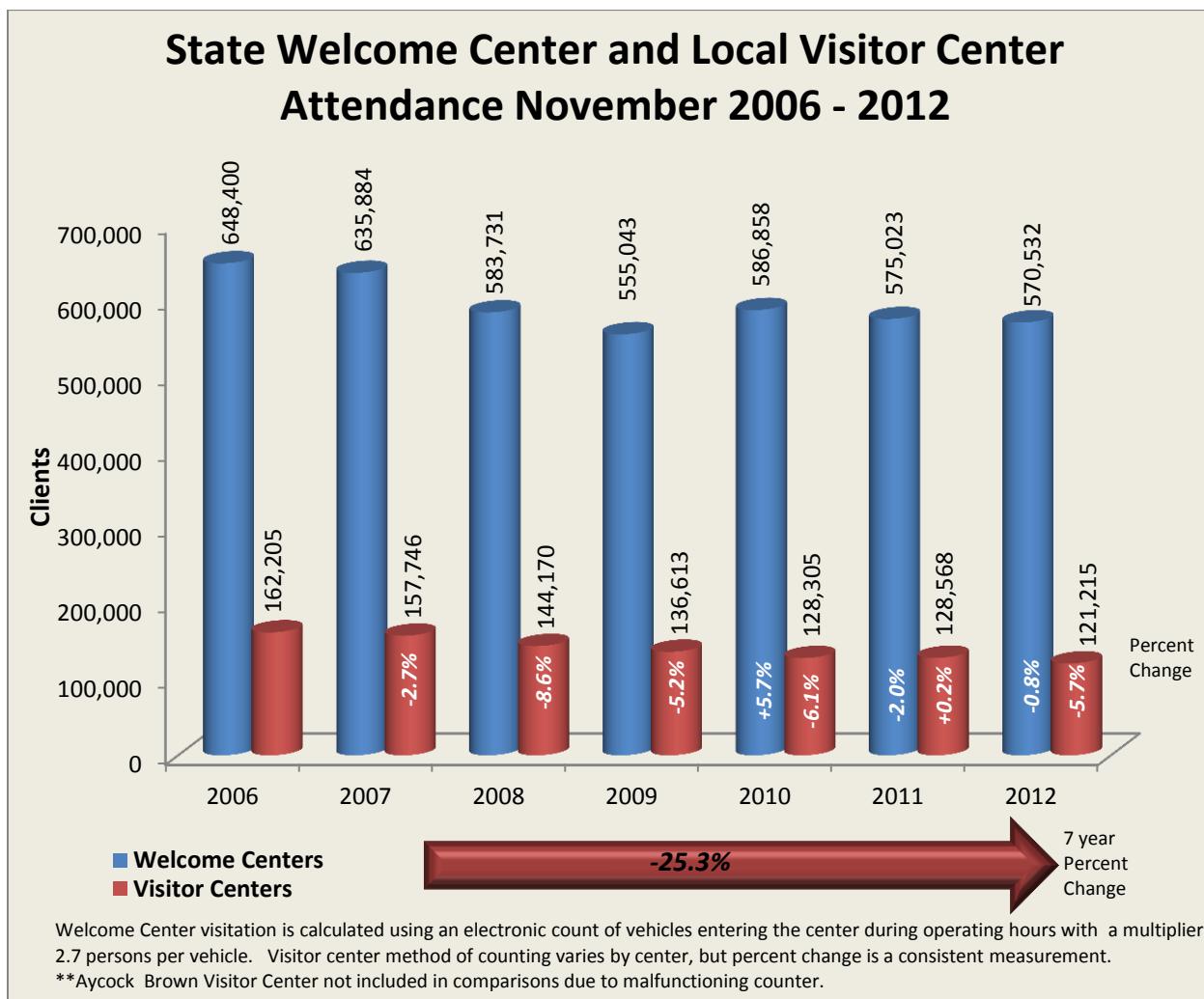


Chart 8 provides November visitation statistics for State Welcome Centers, as well as Local Visitor Centers throughout North Carolina. It should be noted that while there is a percent change indicated for welcome centers for 2007-2008 and 2008-2009, 2008 was the first year a percent change could accurately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

Chart 9 – Statewide National and State Park Visitation - November 2006 – 2012

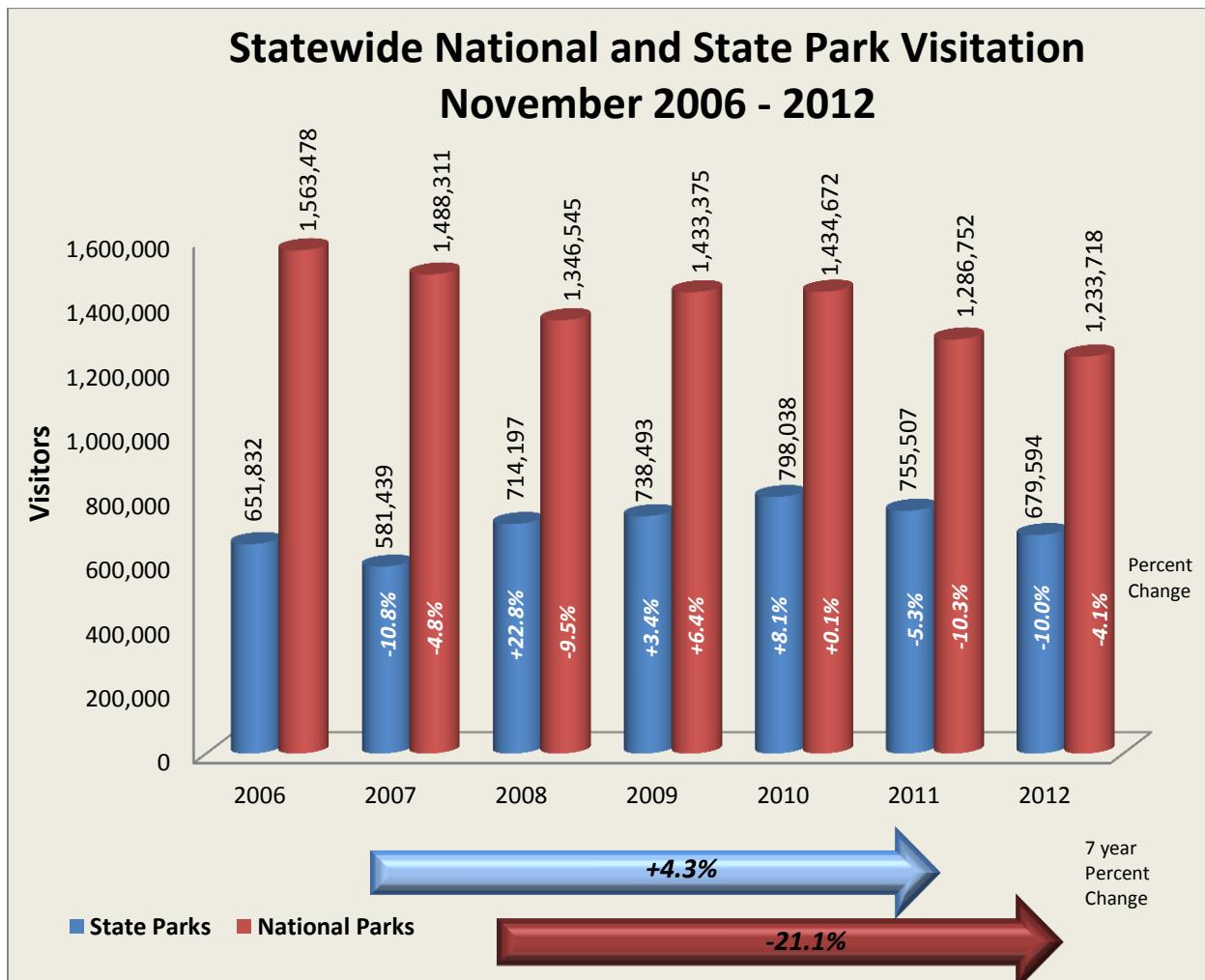
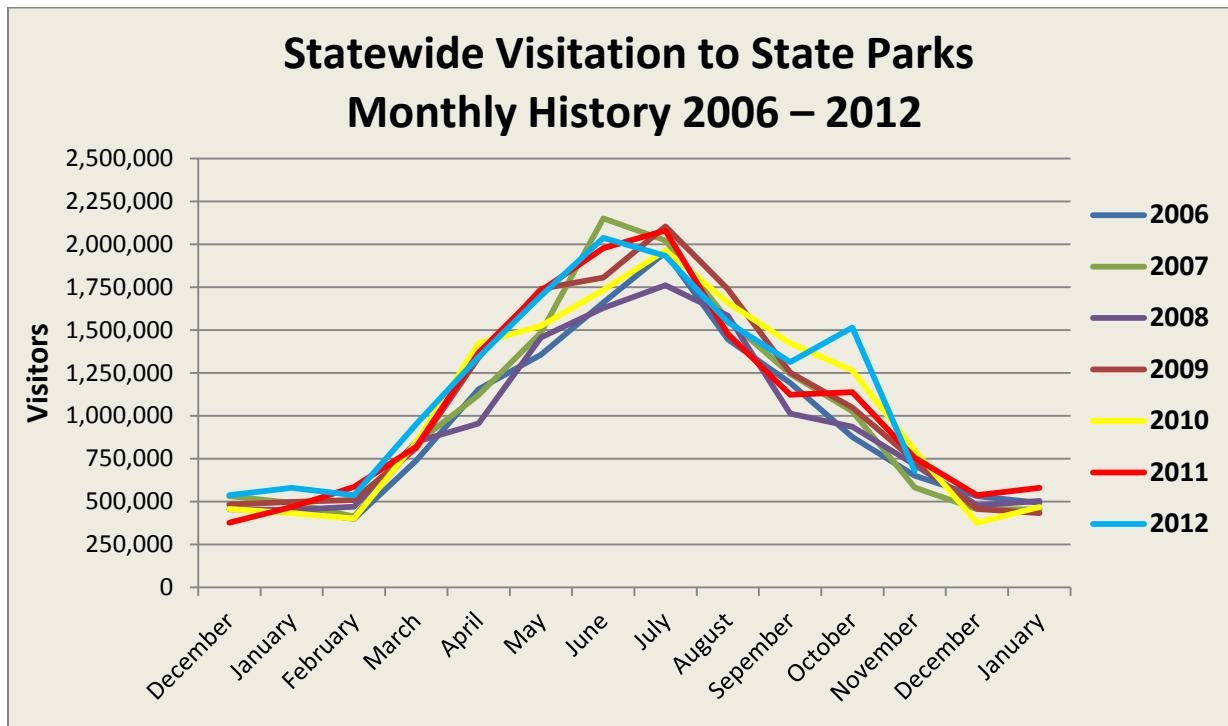


Chart 9 depicts visitation to state and national parks in North Carolina for the last seven years months of November. Both state and national park visitation were down for the month from last year.

Chart 10 – Statewide Visitation to State Parks Monthly History 2006 – 2012



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 2006 – 2012

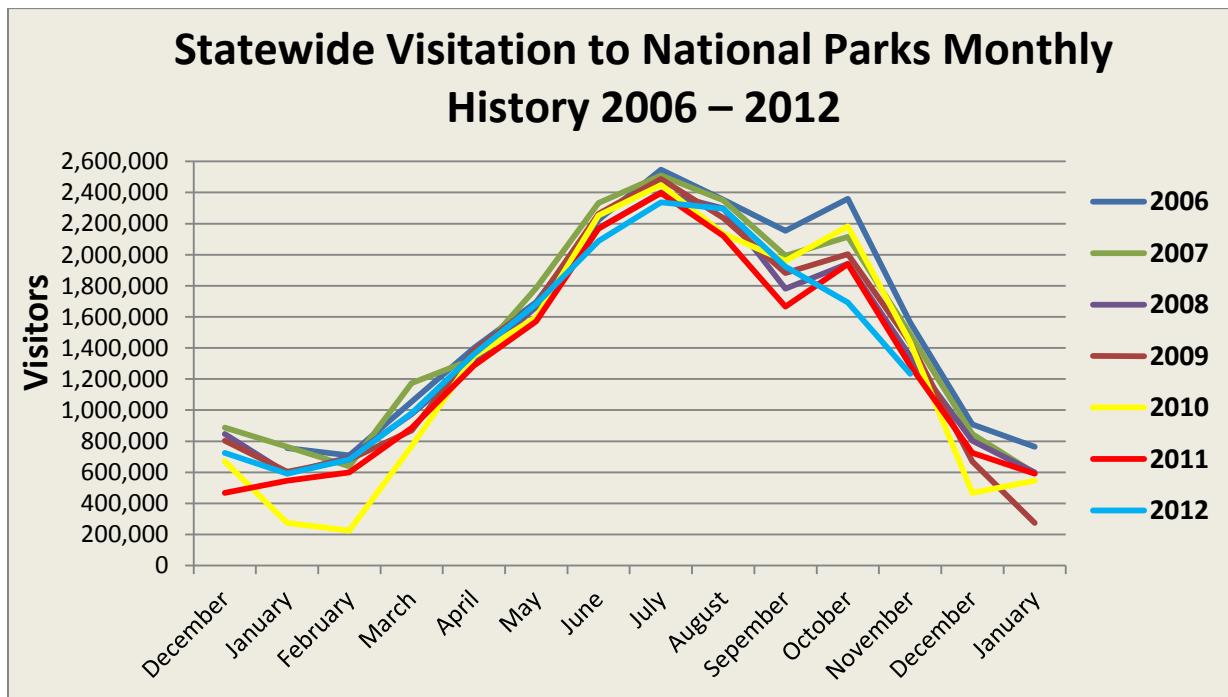


Chart 12 – Statewide Historic Sites Visitation - November 2009 – 2012

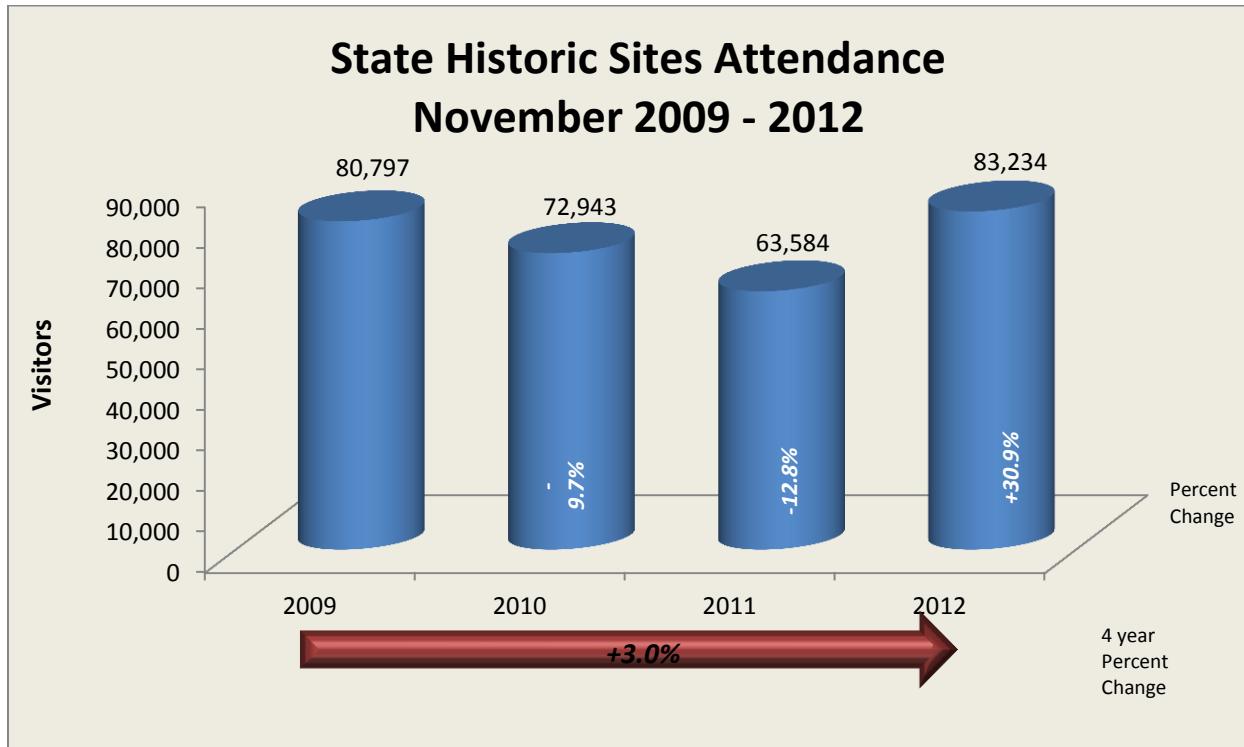


Chart 12 depicts visitation to State Historic Sites in North Carolina for the last four years of November. As this report has just begun tracking historic site visitation, more data is needed to determine the trend, however, November 2012 showed a very positive increase in statewide historic site visitation.

Chart 13 – Statewide Visitation to State Historic Sites History 2009 – 2012

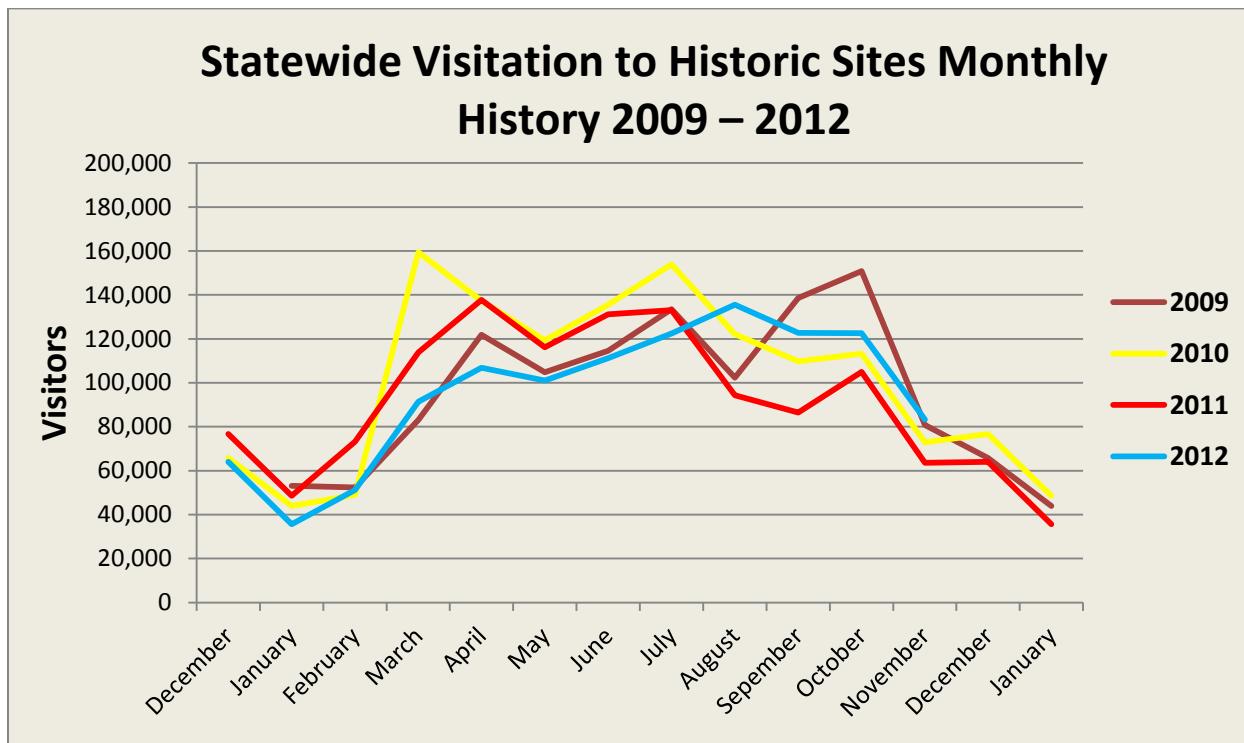


Chart 14 – Statewide Airport Arrivals and Departures - November 2006 – 20110

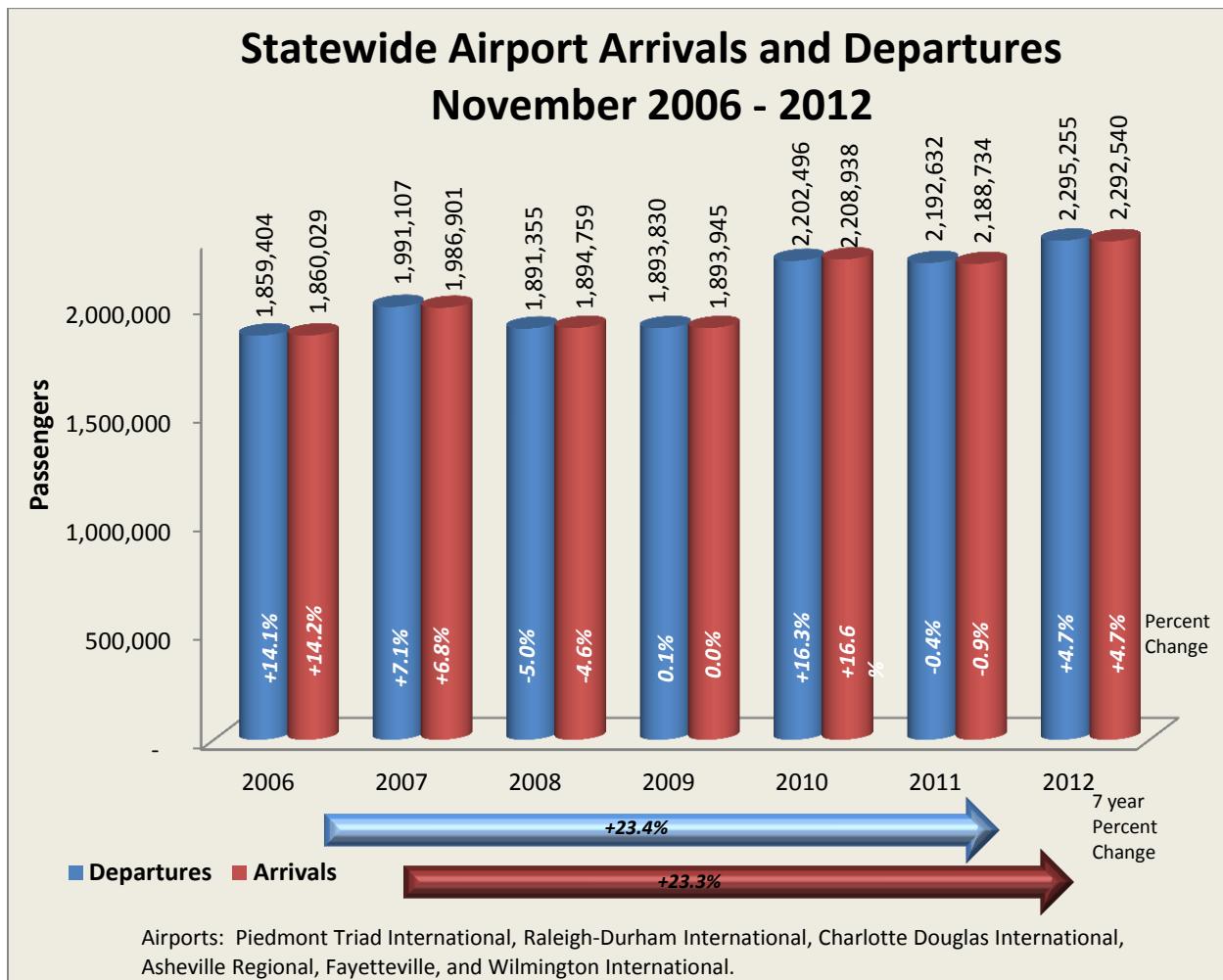


Chart 14 shows November airport arrivals and departures for each of the previous seven years. Both arrivals and departures were up over four percent in November 2012 from 2011 and there has been a substantial seven-year increase in both for the month of November.

Chart 15 – Lower Atlantic Average Monthly Retail Gas Prices for Unleaded – November 2006 – 2012

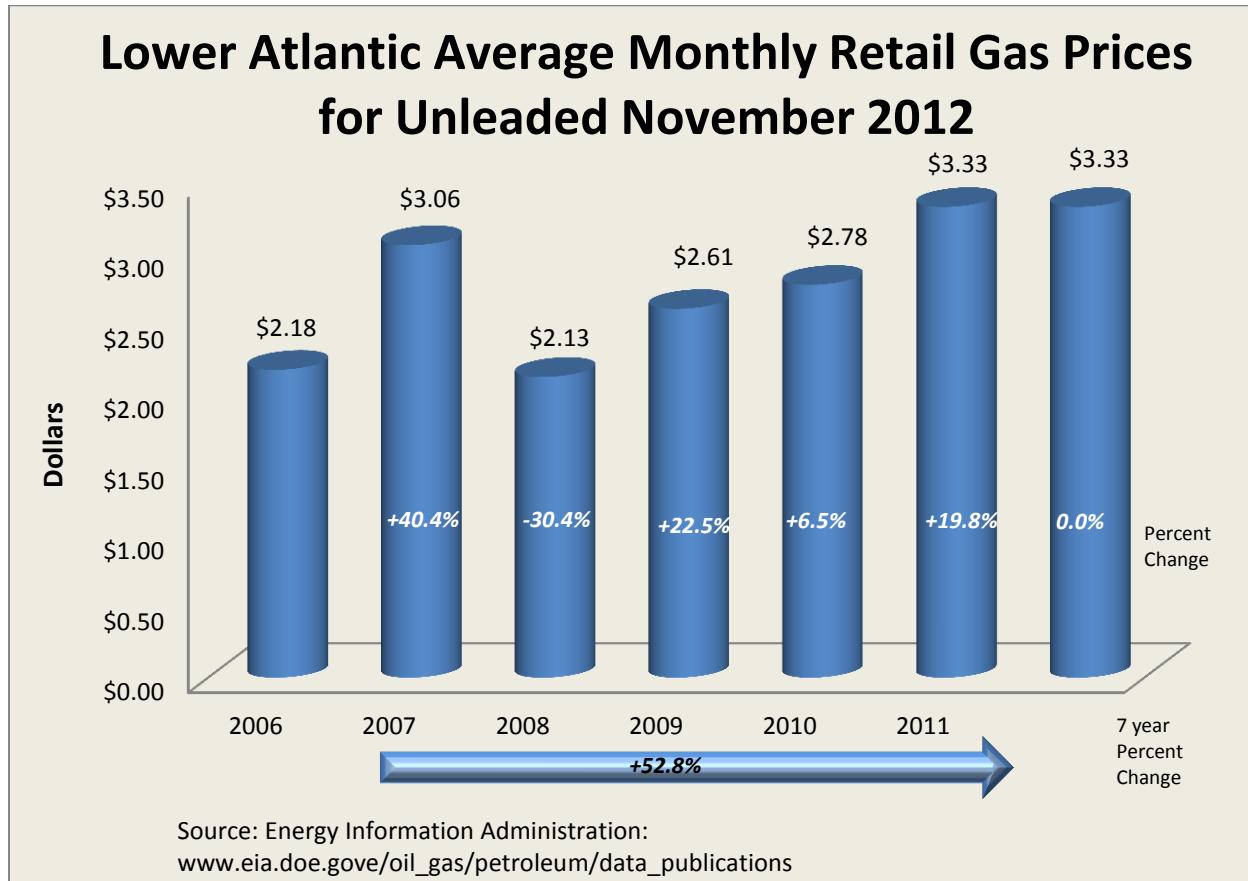


Chart 15 provides the average price per gallon of unleaded gasoline for November 2012 and the same month from the six previous years. The data provided above, when compared with other indicators such as attraction attendance and visitor spending data, can be very helpful in the analysis of general travel trends. Fuel prices in November 2012 were flat from last November, but still up over fifty percent over the last seven years.

Chart 16 – North Carolina Average Temperature and Precipitation – November 2010 – 2012

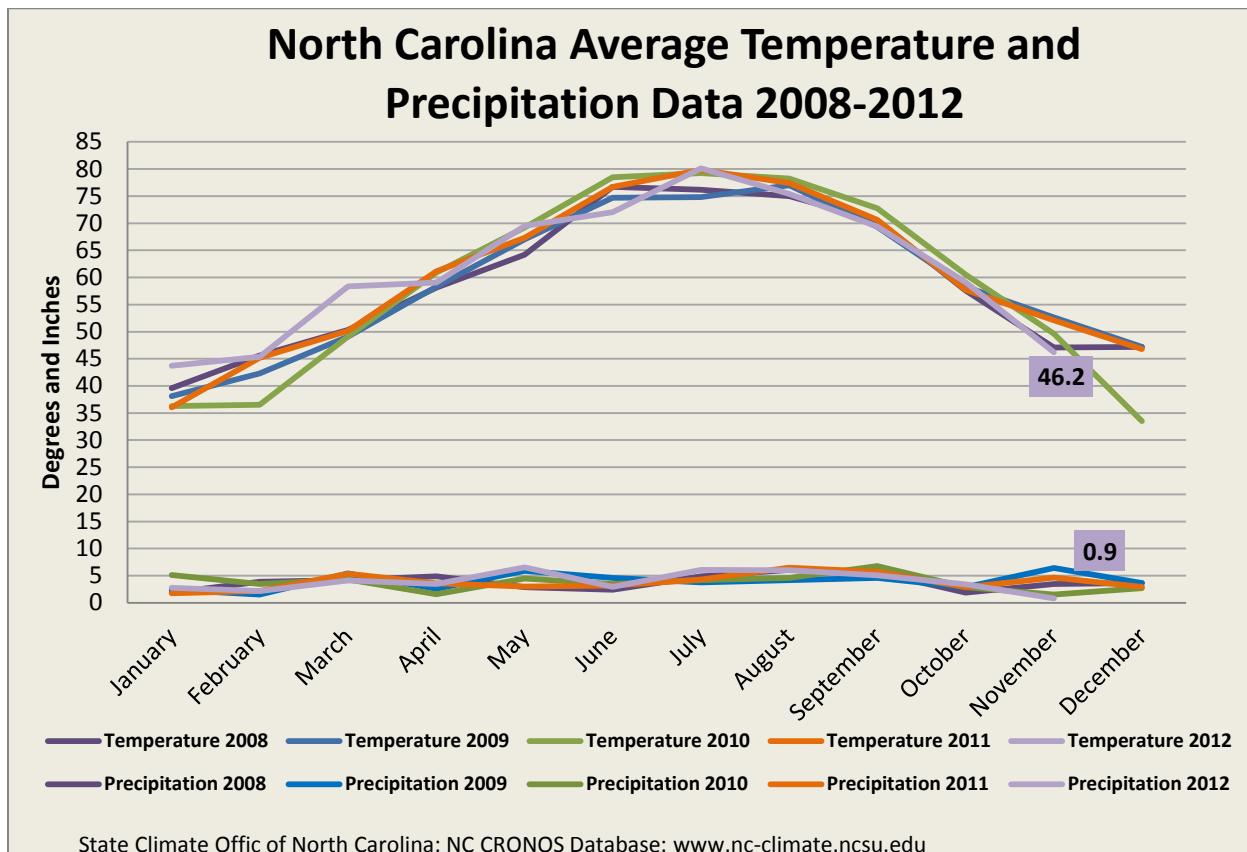


Chart 16 provides 48 months of air temperature and precipitation. This data, when analyzed together with gas price data and other tourism indicators, can be valuable in determining possible reasons for significant increases and/or decreases in indicators. For instance, greater than normal precipitation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

The average temperature in November was a little lower than normal, and precipitation for the month was down drastically; the least precipitation for November in at least five years.

Section 2 – Geographic Marketing Region (Coastal/Piedmont/Mountain) Tourism Indicator Analysis for November 2012

Chart 17 – Hotel/Motel Statistics by Geographic Region - November 2012

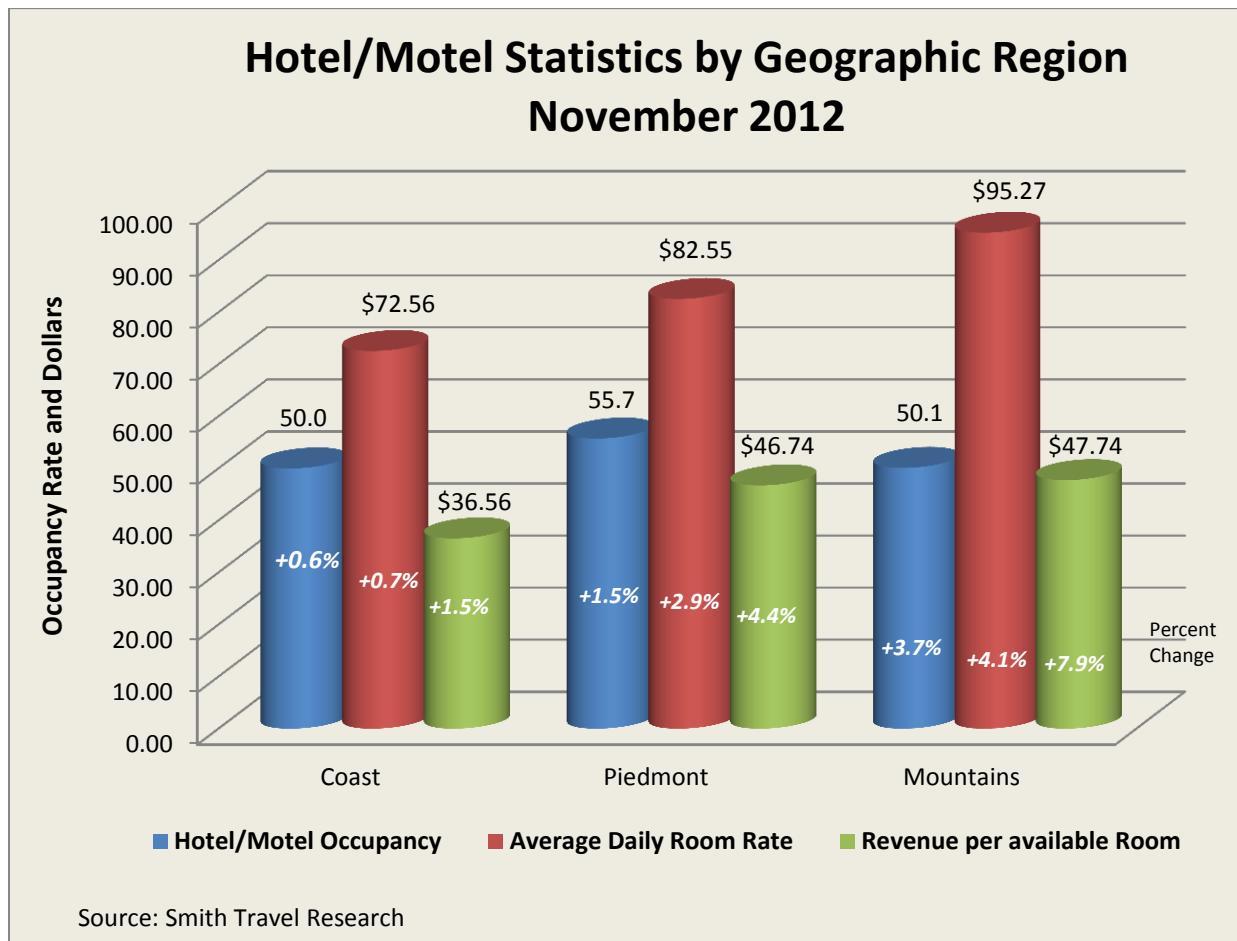


Chart 17 provides a one year comparison in lodging statistics for the three geographic marketing regions of North Carolina in November. Lodging indicators statewide were positive in November, Mountain Region occupancy was up nearly four percent from 2011, and the region's RevPAR was up nearly eight percent from last November.

Chart 18 – Hotel/Motel Room Demand by Geographic Region - November 2012

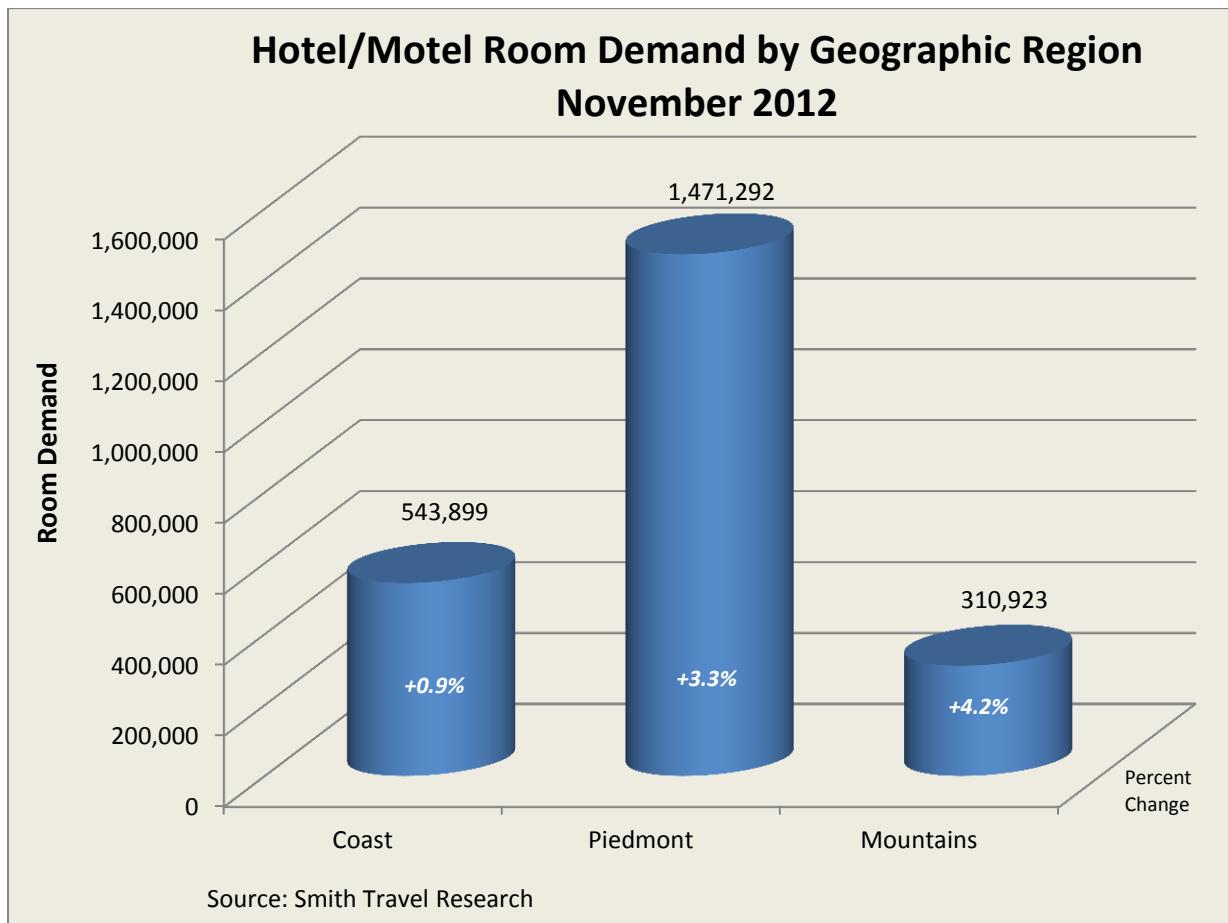


Chart 18 provides hotel/motel demand by geographic region for November 2012. Demand differs from occupancy in that it is the total number of rooms sold, not accounting for differences in room supply. All three geographic regions had positive increases in lodging demand from November 2011 to November 2012, particularly the Mountain Region (+4%).

Chart 19 – Visitation to Attractions, Parks and Historic Sites by Geographic Region – November 2012

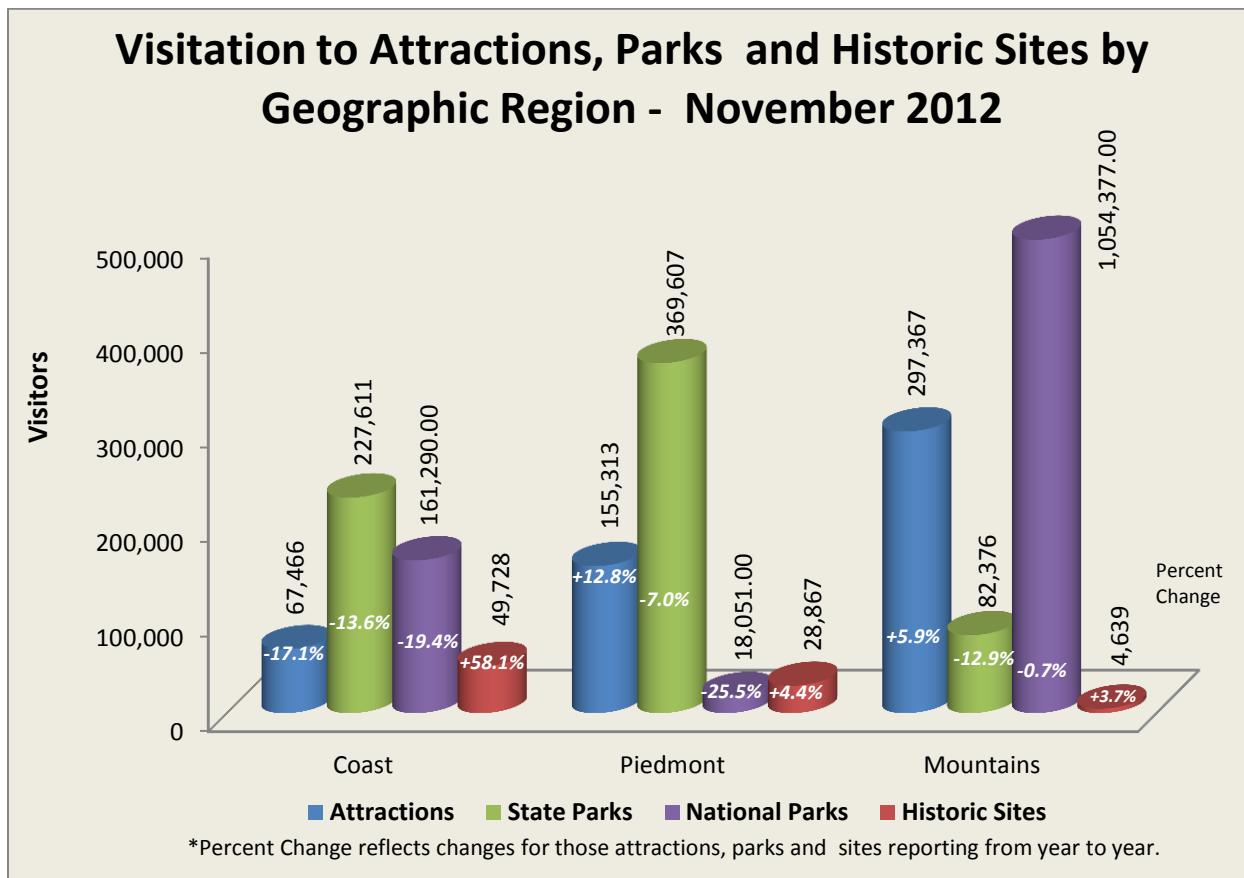


Chart 19 provides a look at the attractions industry in North Carolina in November 2012 by geographic region. As with the statewide numbers, the following data represents only a sample of North Carolina attractions that provide their attendance data, and are not intended to be considered a complete list 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.

November attendance growth for attractions and parks varied by region. While attraction attendance increased in the Piedmont and Mountain regions, it fell in the Coastal Region. State and national park attendance fell in all three regions, but historic site visitation increased from last November.

Chart 20 – State Welcome Center and Local Visitor Center Attendance by Geographic Region –November 2012

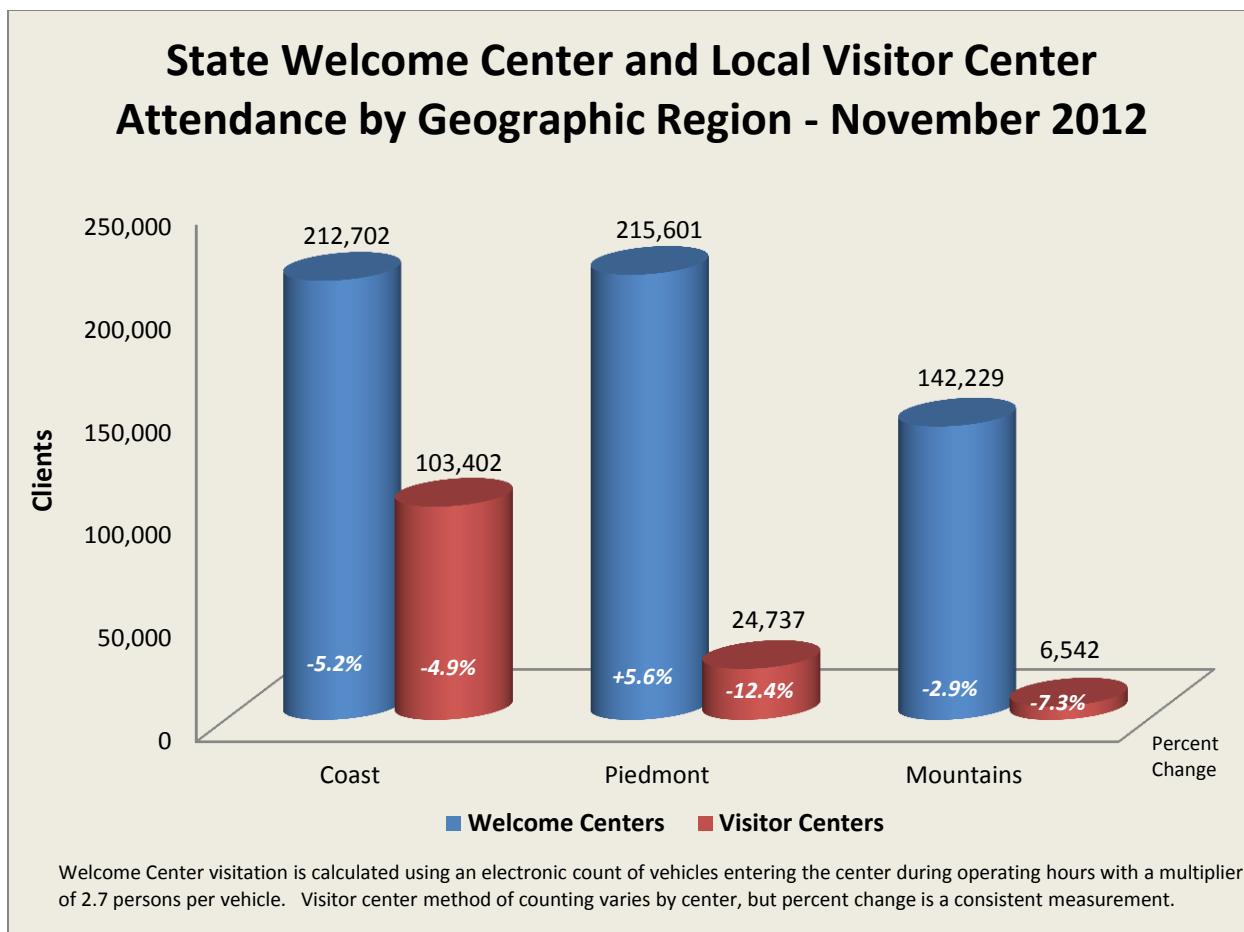


Chart 20 shows welcome center and visitor center attendance by geographic region and offers comparisons from November 2011.

Chart 21 – Airport Arrivals and Departures by Geographic Region – November 2012

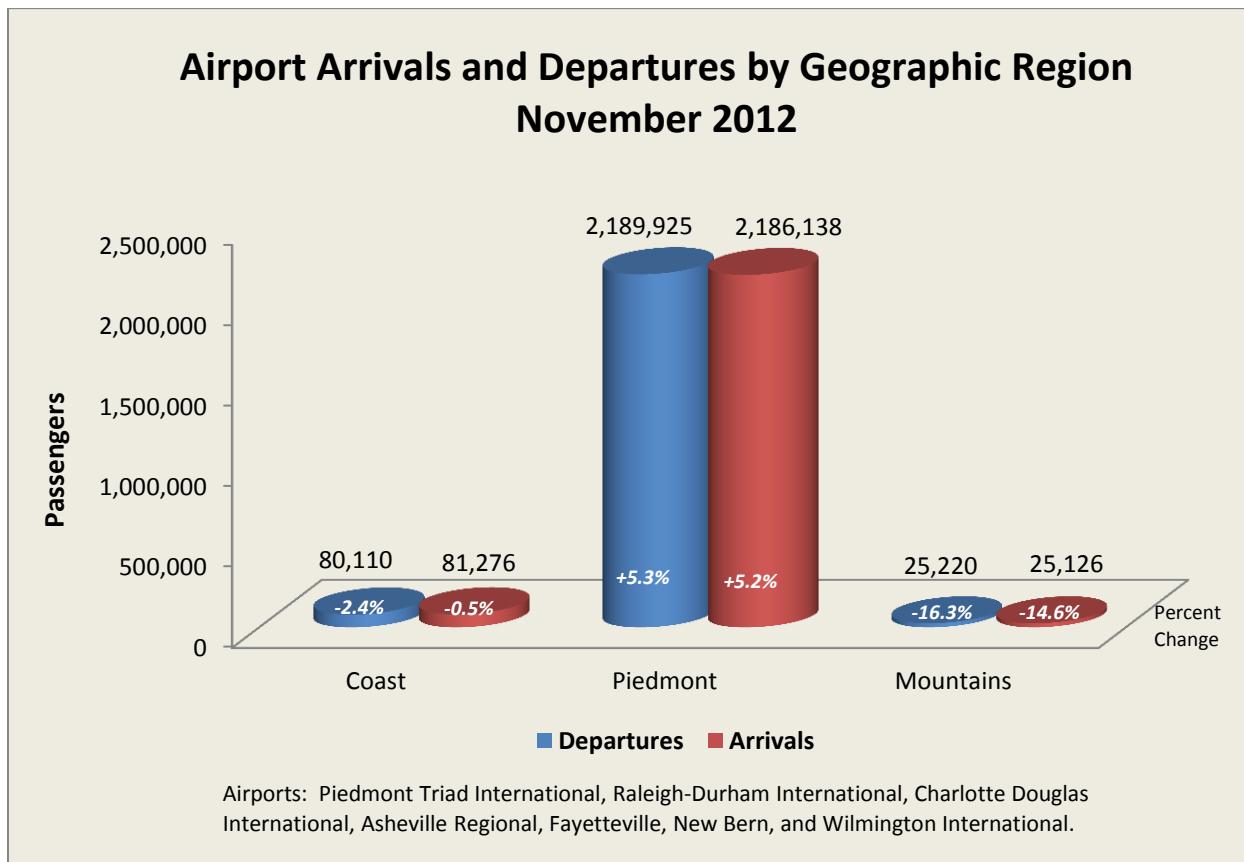


Chart 21 provides a breakdown of air travel statistics by geographic region. While the majority of air traffic is through the Piedmont Region, it is helpful to maintain a trend of other regional airport usage. The Mountain Region showed decreases in arrivals and departures from November 2011 to 2012. The discontinuation of seasonal service is one explanation for the decreases in 2012. For instance in Asheville, seasonal service to Dallas, Ft. Walton Beach and Tampa were discontinued from 2011 to 2012. Coastal Region arrivals were also down somewhat from last November, while Piedmont Region flight data showed increases of around five percent.

Section 3: Economic Development Region Tourism Indicator Analysis – November 2012

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 2012

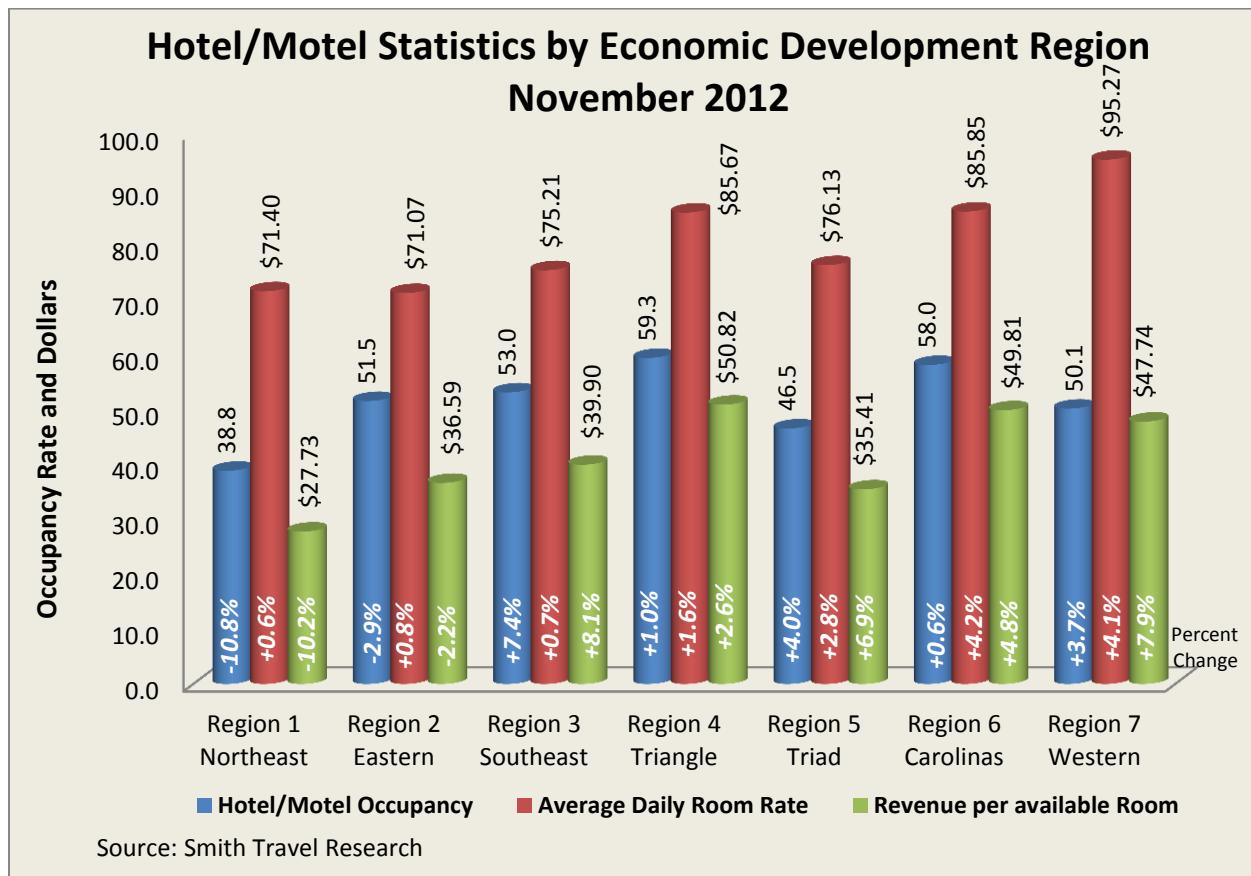


Chart 22 provides lodging indicators for November 2012 by economic development region. Also shown are percent changes from November 2011. This graph allows individual regions within the state to track indicators specific to their general destinations, while still being able to compare their data to the state data shown in Section 1.

The Southeast, Triad and Mountain regions reported the most growth in November from the previous year, both in occupancy and RevPAR growth.

Chart 23 – Hotel/Motel Room Demand by Economic Development Region - November 2012

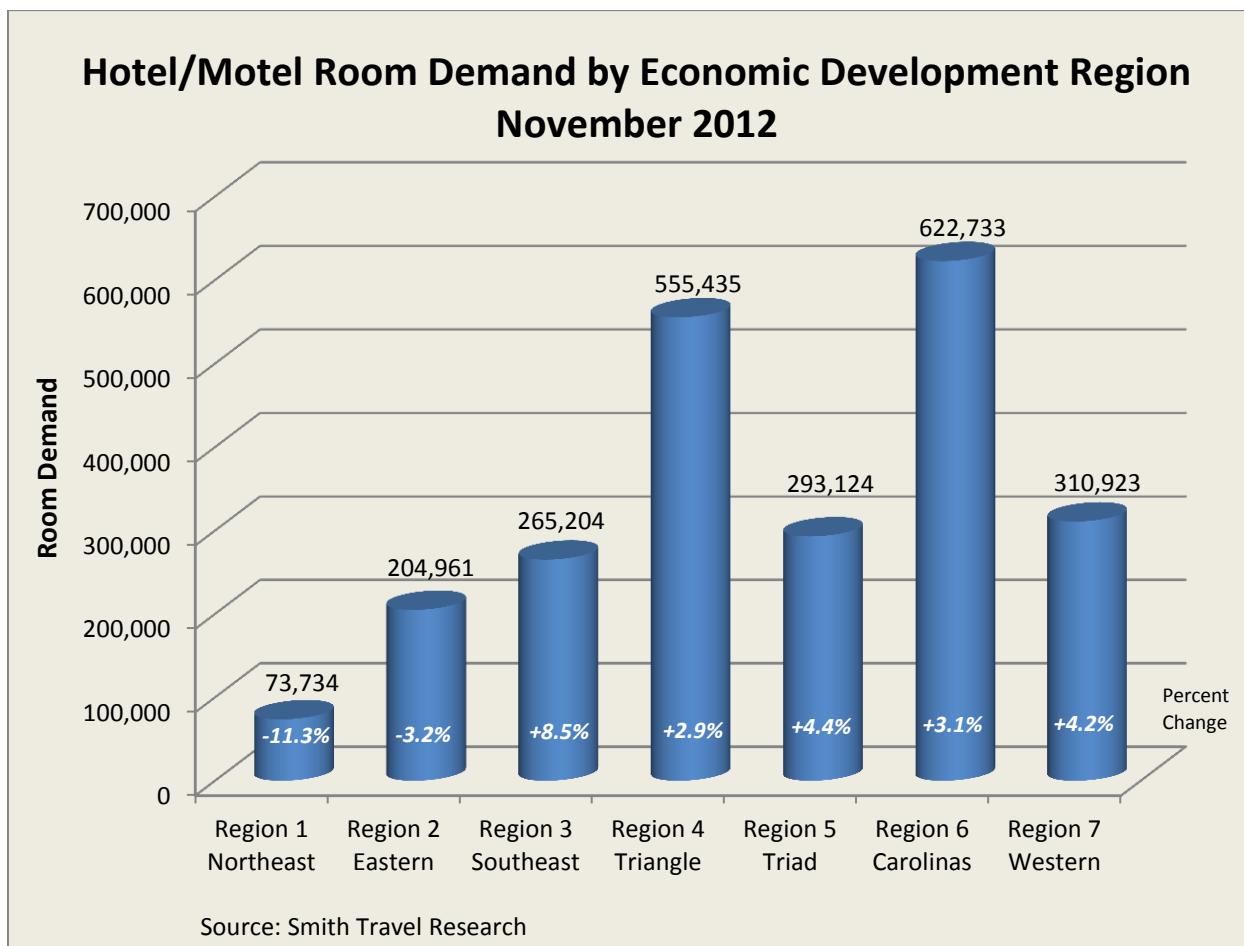


Chart 23 depicts hotel/motel demand for the month of November 2012 by economic development region. Demand is the number of rooms sold excluding complimentary rooms. Five of the seven regions experienced increased demand from November 2011 to 2012, particularly the Southeast Region.

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 2012

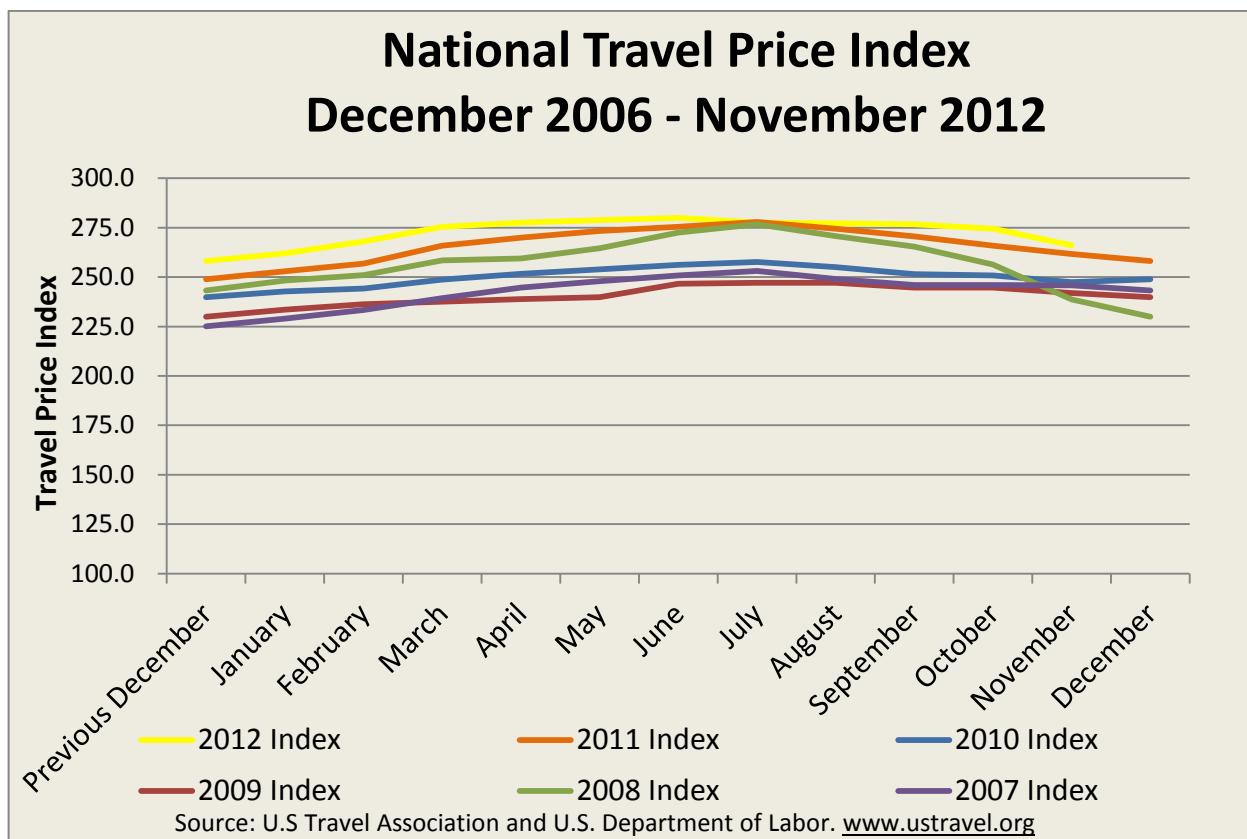


Chart 24 provides a five year trend of the National Travel Price Index (TPI). Steady growth was experienced through mid-2008; however in November 2008, it is clear that as the TPI fell below 2007 levels, the tourism industry began feeling the full effect of the recession. For most of 2009, the TPI remained slightly at or below the 2007 level. In December 2010, the TPI finally inched above the each of the previous Decembers from 2007, and continued that year-over-year growth into June 2011. Growth slowed during the summer months to be just barely above the TPI of July 2008, but has since moved to above all previous six years. While 2012 has seen continued growth in travel prices overall, November saw a slight drop as compared to recent months.

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

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