

## May 2013 Monthly Lodging Report (Smith Travel Research)

### Statewide

- Hotel/motel **occupancy** increased 0.4% statewide in May 2013 from May 2012.
  - US **occupancy** increased 1.1% in May 2013 from May 2012.
  - South Atlantic states **occupancy** increased 1.1% in May 2013 from May 2012.
- May 2013 **room rates (ADR)** in North Carolina were up 2.6%.
  - **Room rates** in the US increased 3.6% from May 2012.
  - **Room rates** in the South Atlantic states increased 1.4% from May 2012.
- Statewide, **RevPAR** was up 3.0% from May of 2012.
  - US **RevPAR** increased 4.7% from May 2012.
  - South Atlantic **RevPAR** increased 2.5% from May 2012.
- **Room Supply** increased by 1.0% in the state from May 2012 to May 2013.
  - US **room supply** increased 0.8% in May 2013
  - South Atlantic **room supply** was up 0.5% from May 2012 to May 2013.
- **Room Demand** was up 1.4% in the state from May 2012 to May 2013.
  - **Room demand** in the US increased 1.9% in May 2013 from May 2012.
  - **Room demand** in the South Atlantic increased 1.6% in May 2013 from May 2012.
- North Carolina **room revenues** increased 4.1% in May 2013.
  - **Room revenues** in the US increased 5.5% from May 2012 to May 2013.
  - **Room revenues** in the South Atlantic increased 3.0% from May 2012 to May 2013.

### Regional

- Three of the seven economic development regions of the state showed increases in **occupancy** rates for May 2013 from May 2012, particularly the Western and Northeast regions. This was the first year-over-year monthly increase for the Northeast Region in the last year.
  - Northeast region +3.5%
  - Southeast region -0.2%
  - Eastern region -1.3%
  - Carolinas region -0.5%
  - Triad region +1.9%
  - Triangle region -2.1%
  - Western region +5.1%
- Five of the seven regions experienced increased **ADR** in May 2013 from May 2012. The Western Region ADR was up over five percent from last May.
  - Northeast region +2.9%
  - Southeast region +0.3%
  - Eastern region -0.8%
  - Carolinas region +2.2%
  - Triad region +2.9%
  - Triangle region +3.2%
  - Western region +5.4%
- **RevPAR** was up in six of the seven economic development regions of the state for May 2013 from May 2012. **RevPAR** was up nearly eleven percent in the Western Region and up over six percent in the Northeast Region.
  - Northeast region +6.5%
  - Southeast region +0.1%
  - Eastern region -2.1%
  - Carolinas region +1.7%
  - Triad region +4.8%
  - Triangle region +1.1%
  - Western region +10.8%
- **Room Supply** was up in six of the seven of the economic development regions of the state for May 2013 from May 2012, particularly in the Carolinas Region.
  - Northeast region +0.6%
  - Southeast region -0.4%
  - Eastern region +1.6%
  - Carolinas region +2.2%
  - Triad region +0.3%
  - Triangle region +1.2%
  - Western region +0.7%
- **Room Demand** was up in five of the economic development regions of the state for May 2013 from 2012.
  - Northeast region +4.1%
  - Southeast region -0.6%
  - Eastern region +0.3%
  - Carolinas region +1.7%
  - Triad region +2.2%
  - Triangle region -0.9%
  - Western region +5.9%
- **Room Revenues** were up in five of the economic development regions of the state for May 2013 from 2012. The Western Region had revenue growth of nearly twelve percent.
  - Northeast region +7.1%
  - Southeast region -0.4%
  - Eastern region -0.5%
  - Carolinas region +3.9%
  - Triad region +5.1%
  - Triangle region +2.3%
  - Western region +11.6%

## Year-To-Date (through May 2013) Lodging Report

### Statewide & Competitive State Comparison

- Hotel/motel **occupancy** is up 1.1% statewide YTD (through May) 2013.
  - The US **occupancy** is up 2.0% in 2013 from 2012.
  - The South Atlantic states **occupancy** is up 1.8% in 2013 from 2012.
- YTD **room rates (ADR)** in North Carolina are up 3.0%.
  - The US **ADR** is up 4.2% in 2013 from 2012.
  - The South Atlantic states **ADR** is up 3.9% in 2013 from 2012.
- Statewide, **RevPAR** is up 4.2% year-to-date.
  - Nationally, **RevPAR** is also up 6.3% in 2013 from 2012.
  - The South Atlantic states **RevPAR** is up 5.8% in 2013 from 2012.
- **Room Supply** is up 1.1% in the state year-to-date.
  - Nationally, **room supply** is also up 0.7% in 2013 from 2012.
  - The South Atlantic states **room supply** is up 0.4% in 2013 from 2012.
- **Room Demand** is up 2.2% in the state year-to-date.
  - Nationally, **room demand** is also up 2.8% in 2013 from 2012.
  - The South Atlantic states **room demand** is up 2.3% in 2013 from 2012.
- North Carolina **room revenues** are up 5.3% year-to date.
  - Nationally, **room revenues** are also up 7.1% in 2013 from 2012.
  - The South Atlantic states **room revenues** are up 6.3% in 2013 from 2012.

### Regional

- **Occupancy** in five of the seven economic development regions of the state is up year-to-date (through May).
  - Northeast region -2.5%
  - Southeast region +1.9%
  - Eastern region -3.1%
  - Carolinas region +1.6%
  - Triad region +1.7%
  - Triangle region +0.2%
  - Western region +4.6%
- **ADR** in six of the seven regions is up year-to-date through May. The Eastern Region ADR is nearly flat year-to-date.
  - Northeast region +0.8%
  - Southeast region +1.1%
  - Eastern region -0.2%
  - Carolinas region +3.8%
  - Triad region +4.2%
  - Triangle region +2.6%
  - Western region +4.4%
- **RevPAR** is up year-to-date in five of the seven economic development regions of the state. The Western Region is up over nine percent.
  - Northeast region -1.7%
  - Southeast region +3.0%
  - Eastern region -3.3%
  - Carolinas region +5.5%
  - Triad region +5.9%
  - Triangle region +2.8%
  - Western region +9.2%
- **Room Supply** is up in six of the economic development regions year-to-date through May.
  - Northeast region -0.4%
  - Southeast region +0.1%
  - Eastern region +1.8%
  - Carolinas region +2.2%
  - Triad region +0.3%
  - Triangle region +1.1%
  - Western region +0.7%
- **Room Demand** is up five of the economic development regions of the state year-to-date through May.
  - Northeast region -2.9%
  - Southeast region +2.1%
  - Eastern region -1.4%
  - Carolinas region +3.9%
  - Triad region +2.0%
  - Triangle region +1.3%
  - Western region +5.3%
- **Room Revenues** are up in five of the economic development regions year-to-date through May. Revenues in the Western Region, in particular, are up nearly ten percent.
  - Northeast region -2.1%
  - Southeast region +3.2%
  - Eastern region -1.6%
  - Carolinas region +7.8%
  - Triad region +6.2%
  - Triangle region +3.9%
  - Western region +9.9%