

April 2010 Monthly Lodging Report (Smith Travel Research)

Statewide

- Hotel/motel **occupancy** increased 5.1% statewide in April 2010 from April 2009.
 - US **occupancy** was up 4.7 percent for the month of April 2010.
- April 2010 **room rates (ADR)** in North Carolina were nearly flat from last April (down -0.6%).
 - The US saw a decrease in **ADR** of -1.2% from April 2009 to April 2010.
- Statewide, **RevPAR** was up 4.5%.
 - Nationally, **RevPAR** was up 3.5% for the month of April.
- North Carolina **room revenues** increased 7.5% in April 2010.
 - Nationally, **room revenues** were up 6.1% from April 2009.
- **Room Demand** increased 8.1% in the state from April 2009 to April 2010.
 - Nationally, **room demand** was up 7.3% from April 2009 to April 2010.
- **Room Supply** increased by 2.8% in the state from April 2009 to April 2010.
 - Nationally, **room supply** was up 2.5% from April 2009 to April 2010.

Regional

- All of the seven economic development regions of the state showed increases in **occupancy** rates for April 2010 from April 2009.
 - Northeast region +6.6%
 - Southeast region +5.3%
 - Eastern region +3.6%
 - Carolinas region +9.9%
 - Triad region +5.1%
 - Triangle region +1.1%
 - Western region +3.7%
- Four of the seven regions showed increased **ADR** in April 2010 from April 2009.
 - Northeast region +1.9%
 - Southeast region -3.3%
 - Eastern region +0.7%
 - Carolinas region +0.2%
 - Triad region -1.5%
 - Triangle region -1.3%
 - Western region +0.9%
- **RevPAR** was up in six of the seven economic development regions of the state for April 2010 from April 2009. The Triangle Region was just below flat (-0.2%).
 - Northeast region +8.6%
 - Southeast region +1.9%
 - Eastern region +4.3%
 - Carolinas region +10.0%
 - Triad region +3.5%
 - Triangle region -0.2%
 - Western region +4.6%
- **Room Demand** was up in all of the seven of the economic development regions of the state for April 2010 from April 2009. The Carolinas regions had particularly strong growth in April (+14.3%).
 - Northeast region +6.6%
 - Southeast region +8.6%
 - Eastern region +6.0%
 - Carolinas region +14.3%
 - Triad region +7.3%
 - Triangle region +4.3%
 - Western region +6.0%
- **Room Supply** was up in six of the seven of the economic development regions of the state for April 2010 from April 2009. The Northeast region supply was flat over this time period.
 - Northeast region 0.0%
 - Southeast region +3.1%
 - Eastern region +2.4%
 - Carolinas region +4.1%
 - Triad region +2.0%
 - Triangle region +3.1%
 - Western region +2.3%

Year-To-Date (through April 2010) Lodging Report

Statewide & Competitive State Comparison

- Hotel/motel **occupancy** is up 4.1% statewide YTD (through April) 2010.
 - The US **occupancy** is up 3.0% YTD (through April) 2010.
 - The South Atlantic states **occupancy** is up 3.4% YTD (through April) 2010.
- YTD **room rates (ADR)** in North Carolina are down -2.7%.
 - The US **ADR** is down -3.4% year-to-date
 - The South Atlantic states **ADR** is down -3.8% year-to-date.
- Statewide, **RevPAR** is up 1.3% year-to-date.
 - Nationally, **RevPAR** is also down -0.6% year-to-date.
 - The South Atlantic states **RevPAR** is down -0.5% year-to-date.
- North Carolina **room revenues** are up 4.0% year-to date.
 - Nationally, **room revenues** are up 2.1% year-to-date.
 - The South Atlantic states **room revenues** are up 2.5% year-to-date.
- **Room Demand** is up 6.9% in the state year-to-date.
 - Nationally, **room demand** is also up 5.7% year-to-date.
 - The South Atlantic states **room demand** is up 6.6% year-to-date.
- **Room Supply** is up 2.7% in the state year-to-date.
 - Nationally, **room supply** is also up 2.7% year-to-date.
 - The South Atlantic states **room supply** is up 3.0% year-to-date.

Regional

- **Occupancy** in all of the seven economic development regions of the state is up year-to-date (through April). The Carolinas and Triad regions have the largest increases year-to-date, with the Northeast Region following closely.
 - Northeast region +4.3%
 - Southeast region +2.8%
 - Eastern region +1.5%
 - Carolinas region +7.6%
 - Triad region +4.8%
 - Triangle region +2.6%
 - Western region +1.7%
- **ADR** in six of the seven regions is down year-to-date through April. The Western Region was up very slightly terms of ADR growth.
 - Northeast region -0.3%
 - Southeast region -4.0%
 - Eastern region -0.3%
 - Carolinas region -3.5%
 - Triad region -2.4%
 - Triangle region -4.4%
 - Western region +0.4%
- **RevPAR** is up year-to-date in five of the seven economic development regions of the state. The Southeast and Triangle regions are down somewhat.
 - Northeast region +3.9%
 - Southeast region -1.3%
 - Eastern region +1.3%
 - Carolinas region +3.8%
 - Triad region +2.3%
 - Triangle region -2.0%
 - Western region +2.1%
- **Room Demand** is up in all of the economic development regions of the state year-to-date through April, particularly in the Carolinas (Charlotte) region.
 - Northeast region +4.3%
 - Southeast region +5.6%
 - Eastern region +3.2%
 - Carolinas region +12.5%
 - Triad region +6.5%
 - Triangle region +5.1%
 - Western region +4.5%
- **Room Supply** is up in six of the economic development regions of the state year-to-date through April. The Northeast region supply is flat.
 - Northeast region 0.0%
 - Southeast region +2.7%
 - Eastern region +1.6%
 - Carolinas region +4.6%
 - Triad region +1.6%
 - Triangle region +2.5%
 - Western region +2.8%