April 2013 Monthly Lodging Report (Smith Travel Research)

Statewide
- Hotel/motel occupancy increased 3.8% statewide in April 2013 from April 2012.
  - US occupancy increased 3.5% in April 2013 from April 2012.
  - South Atlantic states occupancy increased 2.0% in April 2013 from April 2012.
- April 2013 room rates (ADR) in North Carolina were up 3.8%.
  - Room rates in the US increased 3.8% from April 2012.
  - Room rates in the South Atlantic states increased 2.8% from April 2012.
- Statewide, RevPAR was up 7.8% from April of 2012.
  - US RevPAR increased 7.5% from April 2012.
  - South Atlantic RevPAR increased 4.9% from April 2012.
- Room Supply increased by 1.1% in the state from April 2012 to April 2013.
  - US room supply increased 0.8% in April 2013
  - South Atlantic room supply was up 0.5% from April 2012 to April 2013.
- Room Demand was up 5.0% in the state from April 2012 to April 2013.
  - Room demand in the US increased 4.4% in April 2013 from April 2012.
  - Room demand in the South Atlantic increased 2.6% in April 2013 from April 2012.
- North Carolina room revenues increased 9.0% in April 2013.
  - Room revenues in the US increased 8.4% from April 2012 to April 2013.
  - Room revenues in the South Atlantic increased 5.4% from April 2012 to April 2013.

Regional
- Five of the seven economic development regions of the state showed increases in occupancy rates for April 2013 from April 2012, particularly the Western and Carolinas regions.
  - Northeast region -5.8%  Carolinas region +7.7%  Triangle region +2.8%
  - Southeast region +0.7%  Triad region +5.0%  Western region +8.4%
  - Eastern region -4.4%
- Four of the seven regions experienced increased ADR in April 2013 from April 2012. The Carolinas Region ADR was up over six percent from last April.
  - Northeast region -4.0%  Carolinas region +6.2%  Triangle region +4.1%
  - Southeast region -0.7%  Triad region +5.5%  Western region +4.0%
  - Eastern region 0.0%
- RevPAR was up in four of the seven economic development regions of the state for April 2013 from April 2012. RevPAR was up over fourteen percent in the Carolinas Region and up just over twelve percent in the Western Region.
  - Northeast region -9.6%  Carolinas region +14.4%  Triangle region +7.1%
  - Southeast region 0.0%  Triad region +10.7%  Western region +12.7%
  - Eastern region -4.4%
- Room Supply was up in six of the seven of the economic development regions of the state for April 2013 from April 2012, particularly in the Carolinas Region.
  - Northeast region +0.6%  Carolinas region +2.3%  Triangle region +0.9%
  - Southeast region -0.4%  Triad region +0.3%  Western region +0.7%
  - Eastern region +2.4%
- Room Demand was up in five of the economic development regions of the state for April 2013 from 2012.
  - Northeast region -5.3%  Carolinas region +10.2%  Triangle region +3.8%
  - Southeast region +0.3%  Triad region +5.3%  Western region +9.1%
  - Eastern region -2.1%
- Room Revenues were up in four of the economic development regions of the state for April 2013 from 2012. The Carolinas, Western and Triad regions in particular had positive growth in demand.
  - Northeast region -9.0%  Carolinas region +17.0%  Triangle region +8.0%
  - Southeast region -0.5%  Triad region +11.1%  Western region +13.5%
Year-To-Date (through April 2013) Lodging Report
Statewide & Competitive State Comparison

- **Hotel/motel occupancy** is up 1.5% statewide YTD (through April) 2013.
  - The US occupancy is up 2.2% in 2013 from 2012.
  - The South Atlantic states occupancy is up 2.0% in 2013 from 2012.

- **YTD room rates (ADR)** in North Carolina are up 3.1%.
  - The US ADR is up 4.4% in 2013 from 2012.
  - The South Atlantic states ADR is up 4.6% in 2013 from 2012.

- **Statewide, RevPAR** is up 4.7% year-to-date.
  - Nationally, RevPAR is also up 6.7% in 2013 from 2012.
  - The South Atlantic states RevPAR is up 6.7% 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 2.6% in the state year-to-date.
  - Nationally, room demand is also up 3.0% in 2013 from 2012.
  - The South Atlantic states room demand is up 2.5% in 2013 from 2012.

- North Carolina **room revenues** are up 5.8% year-to-date.
  - Nationally, room revenues are also up 7.5% in 2013 from 2012.
  - The South Atlantic states room revenues are up 7.1% in 2013 from 2012.

**Regional**

- **Occupancy** in five of the seven economic development regions of the state is up year-to-date (through April).
  - Northeast region -4.6%
  - Southeast region +2.7%
  - Eastern region -3.6%
  - Carolinas region +2.2%
  - Triad region +2.3%
  - Western region +4.4%

- **ADR** in five of the seven regions is up year-to-date through April. The Eastern Region ADR is flat year-to-date.
  - Northeast region -0.8%
  - Southeast region +1.4%
  - Eastern region 0.0%
  - Carolinas region +4.3%
  - Triad region +4.4%
  - Western region +4.1%

- **RevPAR** is up year-to-date in five of the seven economic development regions of the state. The Western Region is up nearly nine percent.
  - Northeast region -5.3%
  - Southeast region +4.1%
  - Eastern region -3.6%
  - Carolinas region +6.6%
  - Triad region +6.8%
  - Western region +8.7%

- **Room Supply** is up in six of the economic development regions year-to-date through April.
  - Northeast region -0.4%
  - Southeast region +0.3%
  - Eastern region +1.8%
  - Carolinas region +2.2%
  - Triad region +0.3%
  - Western region +0.7%

- **Room Demand** is up five of the economic development regions of the state year-to-date through April.
  - Northeast region -4.9%
  - Southeast region +3.0%
  - Eastern region -1.9%
  - Carolinas region +4.5%
  - Triad region +2.7%
  - Western region +5.1%

- **Room Revenues** are up in five of the economic development regions year-to-date through April. Revenues in the Western Region, in particular, are up nearly ten percent, as are revenues in the Carolinas Region.
  - Northeast region -5.7%
  - Southeast region +4.4%
  - Eastern region -1.9%
  - Carolinas region +9.0%
  - Triad region +7.2%
  - Western region +9.4%