

June 2010 Monthly Lodging Report (Smith Travel Research)

Statewide

- Hotel/motel **occupancy** increased 6.2% statewide in June 2010 from June 2009.
 - US **occupancy** was up 6.9 percent for the month of June 2010.
- June 2010 **room rates (ADR)** in North Carolina were down -1.4% from last June.
 - Growth in the US **ADR** was up 1.0 percent from June 2009 to June 2010.
- Statewide, **RevPAR** was up 4.7%.
 - Nationally, **RevPAR** was up 8.0% for the month of June.
- North Carolina **room revenues** increased 7.4% in June 2010.
 - Nationally, **room revenues** were up 10.3% from June 2009.
- **Room Demand** increased 9.0% in the state from June 2009 to June 2010.
 - Nationally, **room demand** was up 9.2% from June 2009 to June 2010.
- **Room Supply** increased by 2.6% in the state from June 2009 to June 2010.
 - Nationally, **room supply** was up 2.1% from June 2009 to June 2010.

Regional

- All of the seven economic development regions of the state showed increases in **occupancy** rates for June 2010 from June 2009.
 - Northeast region +3.0%
 - Southeast region +9.0%
 - Eastern region +6.0%
 - Carolinas region +6.7%
 - Triad region +7.9%
 - Triangle region +6.0%
 - Western region +3.2%
- Three of the seven regions showed increased **ADR** in June 2010 from June 2009, particularly the Northeast Region with over 5 percent increase in rates.
 - Northeast region 5.4%
 - Southeast region -3.0%
 - Eastern region 0.2%
 - Carolinas region -3.8%
 - Triad region -1.4%
 - Triangle region -1.5%
 - Western region 0.7%
- **RevPAR** was up in all of the seven economic development regions of the state for June 2010 from June 2009.
 - Northeast region +8.5%
 - Southeast region +5.7%
 - Eastern region +6.2%
 - Carolinas region +2.7%
 - Triad region +6.3%
 - Triangle region +4.3%
 - Western region +3.9%
- **Room Demand** was up in all of the seven of the economic development regions of the state for June 2010 from June 2009. The Southeast and Carolinas regions had particularly strong growth in June (+12.1% and +10.7% respectively).
 - Northeast region +2.9%
 - Southeast region +12.1%
 - Eastern region +8.3%
 - Carolinas region +10.7%
 - Triad region +9.1%
 - Triangle region +9.8%
 - Western region +5.3%
- **Room Supply** was up in six of the seven of the economic development regions of the state for June 2010 from June 2009. The Northeast region supply was flat over this time period.
 - Northeast region 0.0%
 - Southeast region +2.9%
 - Eastern region +2.2%
 - Carolinas region +3.7%
 - Triad region +1.1%
 - Triangle region +3.6%
 - Western region +1.9%

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

Statewide & Competitive State Comparison

- Hotel/motel **occupancy** is up 5.3% statewide YTD (through June) 2010.
 - The US **occupancy** is up 4.4% YTD (through June) 2010.
 - The South Atlantic states **occupancy** is up 4.2% YTD (through June) 2010.

- YTD **room rates (ADR)** in North Carolina are down -2.3%.
 - The US **ADR** is down -2.0% year-to-date
 - The South Atlantic states **ADR** is down -3.1% year-to-date.

- Statewide, **RevPAR** is up 2.9% year-to-date.
 - Nationally, **RevPAR** is up 2.3% year-to-date.
 - The South Atlantic states **RevPAR** is up 1.0% year-to-date.

- North Carolina **room revenues** are up 5.7% year-to date.
 - Nationally, **room revenues** are up 4.9% year-to-date.
 - The South Atlantic states **room revenues** are up 3.9% year-to-date.

- **Room Demand** is up 8.2% in the state year-to-date.
 - Nationally, **room demand** is also up 7.0% year-to-date.
 - The South Atlantic states **room demand** is up 7.2% year-to-date.

- **Room Supply** is up 2.7% in the state year-to-date.
 - Nationally, **room supply** is also up 2.5% year-to-date.
 - The South Atlantic states **room supply** is up 2.9% year-to-date.

Regional

- **Occupancy** in all of the seven economic development regions of the state is up year-to-date (through June). The Carolinas Region has the largest increase year-to-date, followed by the Triad and Northeast regions.
 - Northeast region +5.1%
 - Southeast region +4.9%
 - Eastern region +3.6%
 - Carolinas region +8.3%
 - Triad region +5.4%
 - Triangle region +4.1%
 - Western region +2.7%
- **ADR** in two of the seven regions is up year-to-date through June. The Northeast Region is up very over one percent.
 - Northeast region +1.2%
 - Southeast region -3.3%
 - Eastern region -0.2%
 - Carolinas region -3.3%
 - Triad region -2.1%
 - Triangle region -3.6%
 - Western region +0.3%
- **RevPAR** is up year-to-date in all of the seven economic development regions of the state.
 - Northeast region +6.4%
 - Southeast region +1.4%
 - Eastern region +3.4%
 - Carolinas region +4.7%
 - Triad region +3.1%
 - Triangle region +0.3%
 - Western region +3.1%
- **Room Demand** is up in all of the economic development regions of the state year-to-date through June, particularly in the Carolinas (Charlotte) region.
 - Northeast region +5.1%
 - Southeast region +7.8%
 - Eastern region +5.6%
 - Carolinas region +12.9%
 - Triad region +7.0%
 - Triangle region +7.1%
 - Western region +5.3%
- **Room Supply** is up in six of the economic development regions of the state year-to-date through June. The Northeast region supply is flat.
 - Northeast region 0.0%
 - Southeast region +2.8%
 - Eastern region +1.9%
 - Carolinas region +4.3%
 - Triad region +1.6%
 - Triangle region +2.8%
 - Western region +2.5%

The seven economic development regions of North Carolina are as follows:

- 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).