June 2013 Monthly Lodging Report (Smith Travel Research)

Statewide
- Hotel/motel occupancy was flat statewide in June 2013 from June 2012.
  - US occupancy decreased 0.3% in June 2013 from June 2012.
  - South Atlantic states occupancy increased 0.4% in June 2013 from June 2012.
- June 2013 room rates (ADR) in North Carolina were up 2.5%.
  - Room rates in the US increased 3.3% from June 2012.
  - Room rates in the South Atlantic states increased 1.8% from June 2012.
- Statewide, RevPAR was up 2.5% from June of 2012.
  - US RevPAR increased 3.0% from June 2012.
  - South Atlantic RevPAR increased 2.3% from June 2012.
- Room Supply increased by 1.1% in the state from June 2012 to June 2013.
  - US room supply increased 0.8% in June 2013
  - South Atlantic room supply was up 0.5% from June 2012 to June 2013.
- Room Demand was up 1.0% in the state from June 2012 to June 2013.
  - Room demand in the US increased 0.5% in June 2013 from June 2012.
  - Room demand in the South Atlantic increased 0.9% in June 2013 from June 2012.
- North Carolina room revenues increased 3.6% in June 2013.
  - Room revenues in the US increased 3.8% from June 2012 to June 2013.
  - Room revenues in the South Atlantic increased 2.8% from June 2012 to June 2013.

Regional
- Three of the seven economic development regions of the state showed increases in occupancy rates for June 2013 from June 2012, particularly the Triangle Region. This was the first year-over-year monthly increase for the Northeast Region in the last year.
  - Northeast region +3.4%
  - Southeast region -2.5%
  - Eastern region -0.1%
  - Carolinas region -1.5%
  - Triad region -3.3%
  - Western region +0.1%
- Six of the seven regions experienced increased ADR in June 2013 from June 2012. The Western Region ADR was up over six percent from last June.
  - Northeast region +1.9%
  - Southeast region -0.7%
  - Eastern region +3.1%
  - Carolinas region +2.3%
  - Triad region +1.1%
  - Western region +6.1%
- RevPAR was up in five of the seven economic development regions of the state for June 2013 from June 2012. RevPAR was up nearly seven percent in the Triangle Region and up over six percent in the Western Region.
  - Northeast region +5.3%
  - Southeast region -3.1%
  - Eastern region +3.0%
  - Carolinas region +2.3%
  - Triad region -2.3%
  - Western region +6.2%
  - Triangle region +2.3%
  - Western region +6.7%
- Room Supply was up in five of the seven of the economic development regions of the state for June 2013 from June 2012, particularly in the Carolinas Region.
  - Northeast region 0.0%
  - Southeast region -0.4%
  - Eastern region +3.1%
  - Carolinas region +1.7%
  - Triad region +0.5%
  - Western region +0.8%
  - Triangle region +1.2%
- Room Demand was up in five of the economic development regions of the state for June 2013 from 2012.
  - Northeast region +3.4%
  - Southeast region -2.9%
  - Eastern region +3.0%
  - Carolinas region +0.1%
  - Triad region -2.9%
  - Western region +0.9%
  - Triangle region +5.5%
- Room Revenues were up in five of the economic development regions of the state for June 2013 from 2012. The Triangle Region had revenue growth of nearly twelve percent from 2012.
  - Northeast region +5.3%
  - Southeast region -3.6%
  - Eastern region +6.2%
  - Carolinas region +2.5%
  - Triad region -1.9%
  - Western region +7.1%
  - Triangle region +8.0%
Year-To-Date (through June 2013) Lodging Report
Statewide & Competitive State Comparison

- Hotel/motel occupancy is up 0.9% statewide YTD (through June) 2013.
  - The US occupancy is up 1.5% in 2013 from 2012.
  - The South Atlantic states occupancy is up 1.6% in 2013 from 2012.

- YTD room rates (ADR) in North Carolina are up 2.9%.
  - The US ADR is up 4.0% in 2013 from 2012.
  - The South Atlantic states ADR is up 3.5% in 2013 from 2012.

- Statewide, RevPAR is up 3.8% year-to-date.
  - Nationally, RevPAR is also up 5.6% in 2013 from 2012.
  - The South Atlantic states RevPAR is up 5.2% in 2013 from 2012.

- Room Supply is up 1.1% in the state year-to-date.
  - Nationally, room supply is also up 0.8% in 2013 from 2012.
  - The South Atlantic states room supply is up 0.5% in 2013 from 2012.

- Room Demand is up 2.0% in the state year-to-date.
  - Nationally, room demand is also up 2.3% in 2013 from 2012.
  - The South Atlantic states room demand is up 2.1% in 2013 from 2012.

- North Carolina room revenues are up 5.0% year-to-date.
  - Nationally, room revenues are also up 6.4% in 2013 from 2012.
  - The South Atlantic states room revenues are up 5.7% in 2013 from 2012.

Regional

- Occupancy in five of the seven economic development regions of the state is up year-to-date (through June).
  - Northeast region -1.2%
  - Southeast region +1.1%
  - Eastern region -2.5%
  - Carolinas region +1.1%
  - Triad region +0.6%
  - Western region +3.6%

- ADR in all of the seven regions is up year-to-date through June. The Western Region ADR is up nearly five percent from 2012 year-to-date.
  - Northeast region +1.6%
  - Southeast region +0.6%
  - Eastern region +0.5%
  - Carolinas region +3.6%
  - Triad region +3.7%
  - Western region +4.8%

- RevPAR is up year-to-date in six of the seven economic development regions of the state. The Western Region is up over eight percent.
  - Northeast region +0.3%
  - Southeast region +1.7%
  - Eastern region -1.9%
  - Carolinas region +4.7%
  - Triad region +4.3%
  - Western region +8.5%

- Room Supply is up in five of the economic development regions year-to-date through June.
  - Northeast region -0.4%
  - Southeast region 0.0%
  - Eastern region +2.0%
  - Carolinas region +2.1%
  - 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 June.
  - Northeast region -1.5%
  - Southeast region +1.1%
  - Eastern region -0.5%
  - Carolinas region +3.2%
  - Triad region +1.0%
  - Western region +4.3%

- Room Revenues are up in five of the economic development regions year-to-date through June. Revenues in the Western Region, in particular, are up over nine percent. The two regions without growth in revenues, Northeast and Eastern, were flat.
  - Northeast region 0.0%
  - Southeast region +1.7%
  - Eastern region 0.0%
  - Carolinas region +6.9%
  - Triad region +4.7%
  - Western region +4.6%