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%
  - 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%
  - 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 +2.2%
  - Triad region +4.8%
  - 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%
  - 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%
  - 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%
  - 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%
  - 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%
  - 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%
  - 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%
  - Western region +1.1%

- **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%
  - 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%
  - Western region +9.9%