

## September 2011 Monthly Lodging Report (Smith Travel Research)

### Statewide

- Hotel/motel **occupancy** increased 6.8% statewide in September 2011 from September 2010.
  - The US experienced an increase of 5.7% in **occupancy** for the month of September 2011.
  - The South Atlantic had an increase of 6.2% in **occupancy** in September 2011.
- September 2011 **room rates (ADR)** in North Carolina were up 3.3%.
  - The US saw an increase in **ADR** of 4.0% from September 2010 to September 2011.
  - The South Atlantic states' **ADR** was up 2.9% from September 2010 to September 2011.
- Statewide, **RevPAR** was up 10.3% from September of 2010.
  - Nationally, **RevPAR** was up 10.0% for the month of September.
  - **RevPAR** in the South Atlantic states was up 9.4% during this time frame.
- North Carolina **room revenues** increased 11.2% in September 2011.
  - Nationally, **room revenues** were up 10.7% from September 2010
  - South Atlantic states' **room revenues** were up 9.6% from September 2010.
- **Room Demand** increased 7.6% in the state from September 2010 to September 2011.
  - **Room demand** in the US increased by 6.4% in September 2011.
  - **Room demand** in the South Atlantic increased by 6.4% in September 2011.
- **Room Supply** increased by 0.8% in the state from September 2010 to September 2011.
  - **Room supply** in the US increased by 0.6% from September 2010 to September 2011.
  - **Room supply** in the South Atlantic increased by 0.2% in September 2011.

### Regional

- Six of the seven economic development regions of the state showed increases in **occupancy** rates for September 2011 from September 2010. Only the Southeast Region had a slight decrease from last August (-0.6%). The Northeast and Eastern regions had substantial growth from September 2010 to September 2011.
  - Northeast region +18.6%
  - Southeast region -0.6%
  - Eastern region +19.6%
  - Carolinas region +9.4%
  - Triad region +8.9%
  - Triangle region +2.3%
  - Western region +1.3%
- Six of the regions experienced increased **ADR** in September 2011 from September 2010. The Northeast Region was down three percent for the month.
  - Northeast region -3.3%
  - Southeast region +5.0%
  - Eastern region +2.4%
  - Carolinas region +3.1%
  - Triad region +4.4%
  - Triangle region +4.4%
  - Western region +3.9%
- **RevPAR** was up in all of the seven economic development regions of the state for September 2011 from September 2010.
  - Northeast region +14.7%
  - Southeast region +4.4%
  - Eastern region +22.5%
  - Carolinas region +12.8%
  - Triad region +13.7%
  - Triangle region +6.7%
  - Western region +5.2%
- **Room Demand** was up in all of the economic development regions of the state for September 2011 from 2010. The Northeast and Eastern regions were up over ten percent in room demand.
  - Northeast region +17.6%
  - Southeast region +1.8%
  - Eastern region +23.3%
  - Carolinas region +8.8%
  - Triad region +8.1%
  - Triangle region +3.1%
  - Western region +3.5%
- **Room Supply** was up in four of the seven of the economic development regions of the state for September 2011 from September 2010, particularly in the Southeast, Eastern and Western regions.
  - Northeast region -0.8%
  - Southeast region +2.4%
  - Eastern region +3.1%
  - Carolinas region -0.5%
  - Triad region -0.8%
  - Triangle region +0.8%
  - Western region +2.1%

# Year-To-Date (through September 2011) Lodging Report

## Statewide & Competitive State Comparison

- Hotel/motel **occupancy** is up 4.6% statewide YTD (through September) 2011.
  - The US **occupancy** is up 4.6% in 2011 from 2010.
  - The South Atlantic states occupancy is up 4.5% in 2011 from 2010.
- YTD **room rates (ADR)** in North Carolina are up 2.3%.
  - The US **ADR** is up 3.6% in 2011 from 2010.
  - The South Atlantic states **ADR** is up 2.5% in 2011 from 2010.
- Statewide, **RevPAR** is up 7.0% year-to-date.
  - Nationally, **RevPAR** is also up 8.3% in 2011 from 2010.
  - The South Atlantic states **RevPAR** is up 7.2% in 2011 from 2010.
- North Carolina **room revenues** are up 8.0% year-to date.
  - Nationally, **room revenues** are also up 9.1% in 2011 from 2010.
  - The South Atlantic states **room revenues** are up 7.5% in 2011 from 2010.
- **Room Demand** is up 5.6% in the state year-to-date.
  - Nationally, **room demand** is also up 5.3% in 2011 from 2010.
  - The South Atlantic states **room demand** is up 4.8% in 2011 from 2010.
- **Room Supply** is up 0.9% in the state year-to-date.
  - Nationally, **room supply** is also up 0.7% in 2011 from 2010.
  - The South Atlantic states **room supply** is up 0.3% in 2011 from 2010.

## Regional

- **Occupancy** in six of the seven economic development regions of the state is up year-to-date (through September). The Western Region is down just less than one percent from year-to-date 2010.
  - Northeast region +4.7%
  - Southeast region +1.1%
  - Eastern region +4.4%
  - Carolinas region +7.7%
  - Triad region +4.8%
  - Triangle region +6.2%
  - Western region -0.8%
- **ADR** in all of the seven regions is up year-to-date through September.
  - Northeast region +0.8%
  - Southeast region +2.3%
  - Eastern region +0.7%
  - Carolinas region +3.0%
  - Triad region +1.4%
  - Triangle region +2.8%
  - Western region +2.9%
- **RevPAR** is up year-to-date in all of the seven economic development regions of the state, particularly in the Carolinas and Triangle regions.
  - Northeast region +5.6%
  - Southeast region +3.4%
  - Eastern region +5.2%
  - Carolinas region +10.9%
  - Triad region +6.3%
  - Triangle region +9.2%
  - Western region +2.0%
- **Room Demand** is up all of the regions of the state year-to-date through September, particularly in the Triangle and Carolinas regions.
  - Northeast region +2.8%
  - Southeast region +3.1%
  - Eastern region +6.7%
  - Carolinas region +8.1%
  - Triad region +4.4%
  - Triangle region +7.9%
  - Western region +0.6%
- **Room Supply** is up in five of the economic development regions year-to-date through September. The Carolinas and Triad regions have fairly flat supply growth, while the Northeast Region room supply is down two percent.
  - Northeast region -1.9%
  - Southeast region +2.0%
  - Eastern region +2.2%
  - Carolinas region +0.3%
  - Triad region -0.3%
  - Triangle region +1.6%
  - Western region +1.5%