Year-To-Date (through June 2009) Lodging Report

Statewide & Competitive State Comparison

- Hotel/motel occupancy is down -12.4% statewide YTD (through June) 2009.
  - The US occupancy is down -10.9% YTD (through June) 2009.
  - The South Atlantic states occupancy is down -9.4% (through June) 2009.
  - South Carolina occupancy is down -10.3% (through June) 2009.
  - Virginia occupancy is down -7.6% (through June) 2009.

- YTD room rates (ADR) in North Carolina are down -5.4%.
  - The US ADR is down -8.7% year-to-date.
  - The South Atlantic states ADR is down -7.1% year-to-date.
  - South Carolina ADR is down -7.1% year-to-date.
  - Virginia ADR is down -3.7% year-to-date.

- Statewide, RevPAR is down -17.2% year-to-date.
  - Nationally, RevPAR is also down -18.7% year-to-date.
  - The South Atlantic states RevPAR is down -15.9% year-to-date.
  - South Carolina RevPAR is down -16.7% year-to-date.
  - Virginia RevPAR is down -11.0% year-to-date.

- North Carolina room revenues are down -14.7% year-to-date.
  - Nationally, room revenues are also down -16.1% year-to-date.
  - The South Atlantic states room revenues are down -13.0% year-to-date.
  - South Carolina room revenues are down -14.8% year-to-date.
  - Virginia room revenues are down -7.5% year-to-date.

- Room Demand is down -9.8% in the state year-to-date.
  - Nationally, room demand is also down -8.0% year-to-date.
  - The South Atlantic states room demand is down -6.3% year-to-date.
  - South Carolina room demand is down -8.2% year-to-date.
  - Virginia room demand is down -3.9% year-to-date.

- Room Supply is up 3.0% in the state year-to-date.
  - Nationally, room supply is also up +3.2% year-to-date.
  - The South Atlantic states room supply is up +3.4% year-to-date.
  - South Carolina room supply is up +2.3% year-to-date.
  - Virginia room supply is up +4.1% year-to-date.
Regional

- **Occupancy** in all seven economic development regions of the state is down year-to-date (through June).
  - Northeast region -8.3%
  - Southeast region -10.7%
  - Eastern region -9.6%
  - Carolinas region -16.5%
  - Triad region -12.8%
  - Triangle region -12.0%
  - Western region -9.9%

- **ADR** in all of the seven regions is up year-to-date through June, though the Northeast and Eastern regions had ADRs that were less than one-percent change from last June.
  - Northeast region -0.5%
  - Southeast region -3.2%
  - Eastern region -0.3%
  - Carolinas region -6.8%
  - Triad region -4.9%
  - Triangle region -7.5%
  - Western region -5.1%

- **RevPAR** is down year-to-date in all of the seven economic development regions of the state.
  - Northeast region -8.7%
  - Southeast region -13.5%
  - Eastern region -9.9%
  - Carolinas region -22.2%
  - Triad region -17.1%
  - Triangle region -18.6%
  - Western region -14.5%

- **Room Demand** is down in all of the economic development regions of the state year-to-date through June.
  - Northeast region -6.4%
  - Southeast region -7.0%
  - Eastern region -5.7%
  - Carolinas region -13.9%
  - Triad region -10.5%
  - Triangle region -9.3%
  - Western region -8.4%

- **Room Supply** is up in all of the economic development regions of the state year-to-date through June.
  - Northeast region +2.0%
  - Southeast region +4.1%
  - Eastern region +4.4%
  - Carolinas region +3.1%
  - Triad region +2.7%
  - Triangle region +3.1%
  - Western region +1.7%