

Lodging Outlook Survey
August 2013 Compared With August 2012

Operating Performance - August												
Segment	Occupancy Percent			Average Room Rate			RevPAR**			Room Revenue	Rooms Available	Rooms Sold
	2013	2012	% Chg	2013	2012	% Chg	2013	2012	% Chg	% Chg	% Chg	% Chg
United States	69.2	67.6	2.3	112.14	107.36	4.5	77.59	72.61	6.9	7.6	0.7	3.1
South Atlantic	63.9	62.1	2.9	101.15	98.61	2.6	64.61	61.20	5.6	6.0	0.4	3.4
South Carolina	65.4	63.6	2.8	107.28	102.13	5.0	70.18	64.98	8.0	8.4	0.4	3.2
Savannah, GA	66.2	59.0	12.2	89.13	84.49	5.5	58.96	49.81	18.4	16.3	-1.8	10.2
Myrtle Beach, SC*	72.2	68.3	5.6	139.34	131.97	5.6	100.53	90.14	11.5	11.0	-0.4	5.2
Martinez/Aiken/I-20****	51.3	56.2	-8.6	70.31	67.71	3.8	36.07	38.02	-5.1	-3.2	2.1	-6.7
Rock Hill/Monroe****	63.9	63.9	0.0	76.03	78.74	-3.4	48.56	50.28	-3.4	-3.3	0.1	0.1
Spartanburg	60.4	61.4	-1.7	70.57	65.35	8.0	42.62	40.15	6.1	6.1	0.0	-1.7
Greenville	69.0	67.0	3.0	78.76	72.03	9.3	54.37	48.25	12.7	12.7	0.0	3.0
Anderson/Clemson	60.0	56.0	7.0	87.81	72.98	20.3	52.66	40.90	28.8	28.9	0.1	7.1
Columbia East	65.5	67.9	-3.6	87.29	86.25	1.2	57.18	58.59	-2.4	-2.0	0.5	-3.1
Columbia West	62.2	62.3	-0.1	63.60	60.04	5.9	39.57	37.38	5.9	7.5	1.6	1.5
Florence/Dillon	54.9	55.7	-1.5	67.15	63.52	5.7	36.83	35.37	4.1	5.2	1.0	-0.5
Orangeburg/Sumter	48.0	46.8	2.4	67.21	66.69	0.8	32.23	31.24	3.2	3.0	-0.1	2.2
Hilton Head/Beaufort	69.4	62.8	10.5	148.81	132.77	12.1	103.26	83.39	23.8	24.0	0.1	10.7
I-95 Walterboro/Hardeeville	39.2	34.5	13.6	56.77	56.66	0.2	22.28	19.57	13.9	13.9	0.0	13.6
South Carolina Small Towns	52.3	51.8	1.0	79.61	76.81	3.6	41.62	39.75	4.7	4.8	0.1	1.1
North Charleston	61.5	55.7	10.3	73.21	75.85	-3.5	45.01	42.28	6.4	6.4	0.0	10.3
Charleston Airport	70.8	71.4	-0.8	74.82	75.68	-1.1	52.96	54.03	-2.0	0.2	2.2	1.3
Charleston/West Ashley	81.1	79.2	2.4	149.91	154.80	-3.2	121.52	122.56	-0.8	1.1	1.9	4.4
Mount Pleasant/Isle Of Palms	71.1	73.2	-2.9	161.69	153.72	5.2	114.91	112.54	2.1	2.1	0.0	-2.9
Myrtle Beach North Area	69.7	66.2	5.3	164.58	156.60	5.1	114.67	103.63	10.7	10.4	-0.2	5.0
Myrtle Beach & South	73.3	69.3	5.8	128.10	120.99	5.9	93.91	83.84	12.0	11.4	-0.5	5.2

Operating Performance - January-August Year to Date												
Segment	Occupancy Percent			Average Room Rate			RevPAR**			Room Revenue	Rooms Available	Rooms Sold
	2013	2012	% Chg	2013	2012	% Chg	2013	2012	% Chg	% Chg	% Chg	% Chg
United States	63.9	62.9	1.6	110.28	105.91	4.1	70.51	66.63	5.8	6.6	0.8	2.4
South Atlantic	64.2	63.2	1.7	108.72	105.20	3.3	69.84	66.47	5.1	5.6	0.5	2.1
South Carolina	60.6	59.5	1.9	98.15	94.57	3.8	59.45	56.23	5.7	6.0	0.2	2.1
Savannah, GA	68.9	65.9	4.5	95.82	92.62	3.5	66.02	61.06	8.1	6.6	-1.4	3.1
Myrtle Beach, SC*	56.3	55.8	0.9	117.73	113.65	3.6	66.29	63.39	4.6	4.2	-0.4	0.6
Martinez/Aiken/I-20****	54.7	56.4	-3.0	81.64	79.46	2.7	44.67	44.82	-0.3	1.6	2.0	-1.1
Rock Hill/Monroe****	63.2	63.3	-0.2	77.19	76.33	1.1	48.78	48.32	1.0	1.0	0.0	-0.1
Spartanburg	59.6	59.6	0.1	69.53	65.32	6.4	41.45	38.92	6.5	5.3	-1.2	-1.1
Greenville	69.5	66.4	4.6	78.50	72.93	7.6	54.54	48.46	12.6	12.6	0.0	4.6
Anderson/Clemson	57.9	55.3	4.8	73.67	69.74	5.6	42.69	38.58	10.7	10.8	0.1	4.9
Columbia East	64.6	64.7	-0.2	87.33	84.13	3.8	56.38	54.39	3.6	5.1	1.4	1.3
Columbia West	63.3	60.3	4.9	64.14	62.11	3.3	40.60	37.47	8.3	8.9	0.5	5.5
Florence/Dillon	56.9	60.4	-5.9	66.96	63.09	6.1	38.09	38.12	-0.1	0.4	0.5	-5.4
Orangeburg/Sumter	53.9	51.1	5.5	65.71	66.29	-0.9	35.44	33.90	4.5	5.2	0.6	6.2
Hilton Head/Beaufort	61.5	58.9	4.4	137.34	132.34	3.8	84.50	77.98	8.4	6.1	-2.1	2.3
I-95 Walterboro/Hardeeville	42.7	41.2	3.8	58.17	57.83	0.6	24.87	23.81	4.5	4.4	-0.1	3.8
South Carolina Small Towns	49.8	48.5	2.6	75.08	73.96	1.5	37.35	35.86	4.2	4.2	0.1	2.7
North Charleston	59.4	55.4	7.2	74.51	71.90	3.6	44.24	39.83	11.1	13.1	1.8	9.1
Charleston Airport	70.5	68.0	3.7	76.06	74.36	2.3	53.64	50.58	6.1	9.0	2.8	6.5
Charleston/West Ashley	80.8	79.8	1.2	164.63	156.67	5.1	132.98	125.03	6.4	8.4	1.9	3.2
Mount Pleasant/Isle Of Palms	66.1	67.3	-1.7	147.23	137.98	6.7	97.38	92.84	4.9	4.9	0.0	-1.7
Myrtle Beach North Area	53.4	53.1	0.4	142.20	134.26	5.9	75.88	71.33	6.4	6.3	-0.1	0.3
Myrtle Beach & South	57.7	57.0	1.2	107.08	104.66	2.3	61.77	59.68	3.5	3.0	-0.5	0.7

Participation				
Segment	Properties***		Rooms	
	Census	Sample	Census	Sample
United States	52,845	30,261	4,925,244	3,514,213
South Atlantic	11,073	6,835	1,133,235	845,333
South Carolina	1,078	632	103,597	66,045
Savannah, GA	166	119	14,764	11,855
Myrtle Beach, SC*	217	69	29,175	10,526
Martinez/Aiken/I-20****	62	41	4,590	3,580
Rock Hill/Monroe****	71	57	6,476	5,621
Spartanburg	50	31	3,996	2,640
Greenville	80	59	8,516	6,889
Anderson/Clemson	38	27	2,747	2,133
Columbia East	57	49	5,354	4,969
Columbia West	66	48	5,979	4,695
Florence/Dillon	57	35	5,014	3,437
Orangeburg/Sumter	68	41	4,272	2,770
Hilton Head/Beaufort	46	33	6,043	4,400
I-95 Walterboro/Hardeeville	43	30	2,980	2,334
South Carolina Small Towns	125	52	7,118	3,776
North Charleston	37	26	2,631	2,101
Charleston Airport	57	43	6,356	5,159
Charleston/West Ashley	52	30	6,316	4,415
Mount Pleasant/Isle Of Palms	23	19	2,779	2,489
Myrtle Beach North Area	64	25	9,311	3,920
Myrtle Beach & South	153	44	19,864	6,606

* Myrtle Beach is the combination of Myrtle Beach North Area/Conway and Myrtle Beach & South.
 ** RevPAR = Revenue Per Available Room, i.e., total room revenue divided by total number of room nights.
 *** Hotels with 10 or more rooms only
 **** Rock Hill/Monroe includes parts of Charlotte, Matthews, Monroe, and Pineville in NC, in addition to Rock Hill/York County in SC.
 ***** Martinez/Aiken/I-20 includes parts of Septemba, Grovetown, Martinez and Thomson in GA in addition to the Aiken area in SC.
 NOTE: Unless noted above, segments are mutually exclusive, i.e., properties reported in Florence/Dillon are not included in the I-95 Corridor.

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