

# April 2020 Monthly Lodging Report (Smith Travel Research)

## Statewide

- NC hotel/motel **occupancy** decreased 61.6% statewide in April 2020 from April 2019 (two-year change, -60.5%).
  - US **occupancy** decreased 63.9% in April 2020 from April 2019 (two-year change, -63.9%).
  - South Atlantic states **occupancy** decreased 65.7% in April 2020 from April 2019 (two-year change, -65.7%).
- April 2020 **room rates (ADR)** in North Carolina were down 38.2% (two-year change, -37.1%).
  - **Room rates** in the US decreased 44.4% from April 2019 (two-year change, -48.6%).
  - **Room rates** in the South Atlantic states decreased 48.3% from April 2019 (two-year change, -47.3%)
- Statewide, **RevPAR** was down 76.2% from April of 2019 (two-year change, -75.2%).
  - US **RevPAR** decreased 79.9% from April 2019 (two-year change, -44.0%).
  - South Atlantic **RevPAR** decreased 82.2% from April 2019 (two-year change, -47.3%).
- **Room Supply** decreased by 6.8% in the state from April 2019 to April 2020 (two-year change -6.3%).
  - US **room supply** decreased 12.1% in April 2020 (two-year change, -10.2%).
  - South Atlantic **room supply** was down 15.3% from April 2019 to April 2020 (two-year change, -13.6%).
- **Room Demand** decreased 64.2% in the state from April 2019 to April 2020 (two-year change -63.0%).
  - **Room demand** in the US decreased 68.3% in April 2020 from April 2019 (two-year change, -67.6%).
  - **Room demand** in the South Atlantic decreased 70.9% in April 2020 from April 2019 (two-year change, -70.3%).
- North Carolina **room revenues** decreased 77.9% in April 2020 (two-year change -76.7%).
  - **Room revenues** in the US decreased 82.4% from April 2019 to April 2020 (two-year change, -81.8%).
  - **Room revenues** in the South Atlantic decreased 85.0% from April 2019 to April 2020 (two-year change, -84.4%).

## Regional, April 2020

- **Occupancy**
  - Western Region -69.4% (-68.9%)
  - Northwest Region -60.5% (-58.7%)
  - Southwest Region -62.7% (-63.8%)
  - Piedmont Triad Region -62.3% (-62.4%)
  - North Central Region -62.7% (-61.6%)
  - Sandhills Region -51.7% (-48.2%)
  - Northeast Region -54.8% (-53.2%)
  - Southeast Region -62.5% (-55.4%)
- **ADR**
  - Western Region -42.0% (-41.6%)
  - Northwest Region -26.2% (-22.9%)
  - Southwest Region -40.8% (-41.8%)
  - Piedmont Triad Region -45.9% (-45.4%)
  - North Central Region -38.1% (-36.6%)
  - Sandhills Region -29.9% (-28.0%)
  - Northeast Region -29.3% (-24.4%)
  - Southeast Region -29.8% (-23.2%)
- **RevPAR**
  - Western Region -82.3% (-81.9%)
  - Northwest Region -70.9% (-68.1%)
  - Southwest Region -77.9% (-78.9%)
  - Piedmont Triad Region -79.6% (-79.4%)
  - North Central Region -76.9% (-75.7%)
  - Sandhills Region -66.2% (-62.7%)
  - Northeast Region -68.8% (-64.6%)
  - Southeast Region -73.7% (-65.8%)
- **Room Supply**
  - Western Region -23.3% (-23.3%)
  - Northwest Region -8.2% (-7.1%)
  - Southwest Region -6.6% (-3.7%)
  - Piedmont Triad Region -1.5% (-0.2%)
  - North Central Region -7.3% (-5.5%)
  - Sandhills Region -2.1% (-0.5%)
  - Northeast Region -6.3% (-7.0%)
  - Southeast Region +2.8% (-5.9%)
- **Room Demand**
  - Western Region -76.5% (-76.2%)
  - Northwest Region -63.8% (-61.6%)
  - Southwest Region -65.2% (-65.1%)
  - Piedmont Triad Region -62.9% (-62.5%)
  - North Central Region -65.4% (-63.7%)
  - Sandhills Region -52.7% (-48.5%)
  - Northeast Region -57.7% (-56.5%)
  - Southeast Region -61.4% (-58.0%)
- **Room Revenues**
  - Western Region -86.4% (-86.1%)
  - Northwest Region -73.3% (-70.4%)
  - Southwest Region -79.4% (-79.7%)
  - Piedmont Triad Region -79.9% (-79.5%)
  - North Central Region -78.6% (-77.0%)
  - Sandhills Region -66.9% (-62.9%)
  - Northeast Region -70.1% (-67.1%)
  - Southeast Region -72.9% (-67.8%)

# Year-To-Date (through April 2020) Lodging Report

## Statewide & Competitive State Comparison

- Hotel/motel **occupancy** is down 29.1% statewide YTD (through April) 2020 (two-year change, -24.7%).
  - The US **occupancy** is down 27.7% in 2020 from 2019 (two-year change, -27.5%).
  - The South Atlantic states **occupancy** is down 27.4% in 2020 from 2019 (two-year change, -27.1%).
- YTD **room rates (ADR)** in North Carolina are down 9.6% (two-year change, -6.8%).
  - The US **ADR** is down 9.2% in 2020 from 2019 (two-year change, -8.4%).
  - The South Atlantic states **ADR** is down 8.2% in 2020 from 2019 (two-year change, -6.7%).
- Statewide, **RevPAR** is down 35.8% year-to-date (two-year change -29.9%).
  - Nationally, **RevPAR** is also down 34.3% in 2020 from 2019 (two-year change, -33.6%).
  - The South Atlantic states **RevPAR** is down 33.4% in 2020 from 2019 (two-year change, -32.0%).
- **Room Supply** is up 0.5% in the state year-to-date (two-year change, +0.8%).
  - Nationally, **room supply** is also down 1.5% in 2020 from 2019 (two-year change, +0.6%).
  - The South Atlantic states **room supply** is down 2.2% in 2020 from 2019 (two-year change, -0.2%).
- **Room Demand** is down 28.7% in the state year-to-date (two-year change, -24.1%).
  - Nationally, **room demand** is also down 28.8% in 2020 from 2019 (two-year change, -27.1%).
  - The South Atlantic states **room demand** is down 29.0% in 2020 from 2019 (two-year change, -27.2%).
- North Carolina **room revenues** are down 35.5% year-to date (two-year change, -29.3%).
  - Nationally, **room revenues** are also down 35.3% in 2020 from 2019 (two-year change, -33.2%).
  - The South Atlantic states **room revenues** are down 34.9% in 2020 from 2019 (two-year change, -32.1%).

## Regional, Year-to-Date through April 2020

- **Occupancy**
  - Western Region -32.0% (-28.2%)
  - Piedmont Triad Region -30.0% (-26.2%)
  - Northeast Region -26.6% (-23.1%)
  - Northwest Region -28.9% (-26.6%)
  - North Central Region -27.1% (-23.3%)
  - Southeast Region -37.7% (-18.7%)
  - Southwest Region -27.7% (-28.3%)
  - Sandhills Region -25.4% (-18.9%)
- **ADR**
  - Western Region -7.0% (-7.3%)
  - Piedmont Triad Region -13.0% (-11.4%)
  - Northeast Region -9.7% (-4.8%)
  - Northwest Region -6.5% (-2.1%)
  - North Central Region -7.6% (-5.0%)
  - Southeast Region -10.5% (-0.6%)
  - Southwest Region -10.6% (-8.5%)
  - Sandhills Region -8.3% (-3.9%)
- **RevPAR**
  - Western Region -36.8% (-33.4%)
  - Piedmont Triad Region -39.1% (-34.6%)
  - Northeast Region -33.7% (-26.8%)
  - Northwest Region -33.6% (-28.1%)
  - North Central Region -32.6% (-27.2%)
  - Southeast Region -44.3% (-19.1%)
  - Southwest Region -35.3% (-34.3%)
  - Sandhills Region -31.6% (-22.1%)
- **Room Supply**
  - Western Region -4.2% (-4.1%)
  - Piedmont Triad Region +2.2% (+2.9%)
  - Northeast Region -0.6% (-1.0%)
  - Northwest Region -0.4% (+0.2%)
  - North Central Region -1.8% (-0.2%)
  - Southeast Region +7.7% (-3.0%)
  - Southwest Region +1.3% (+4.6%)
  - Sandhills Region +0.6% (+2.9%)
- **Room Demand**
  - Western Region -34.9% (-31.2%)
  - Piedmont Triad Region -28.4% (-24.0%)
  - Northeast Region -27.0% (-23.8%)
  - Northwest Region -29.2% (-26.4%)
  - North Central Region -28.5% (-23.5%)
  - Southeast Region -32.9% (-21.2%)
  - Southwest Region -26.7% (-25.0%)
  - Sandhills Region -25.0% (-16.6%)
- **Room Revenues**
  - Western Region -39.4% (-36.2%)
  - Piedmont Triad Region -37.7% (-32.7%)
  - Northeast Region -34.1% (-27.5%)
  - Northwest Region -33.9% (-28.0%)
  - North Central Region -33.9% (-27.3%)
  - Southeast Region -40.0% (-21.6%)
  - Southwest Region -34.4% (-31.3%)
  - Sandhills Region -31.2% (-19.8%)

## North Carolina Prosperity Zones

Western Region -	Buncombe, Cherokee, Clay, Graham, Haywood, Henderson, Jackson, Macon, Madison, Polk, Rutherford, Swain, Transylvania
Northwest Region -	Alleghany, Ashe, Alexander, Avery, Burke, Caldwell, Catawba, McDowell, Mitchell, Watauga, Wilkes, Yancey
Southwest -	Anson, Cabarrus, Cleveland, Gaston, Iredell, Lincoln, Mecklenburg, Rowan, Stanly, Union
Piedmont-Triad (Central) -	Alamance, Caswell, Davidson, Davie, Forsyth, Guilford, Randolph, Rockingham, Stokes, Surry, Yadkin
North Central -	Chatham, Durham, Franklin, Granville, Harnett, Johnston, Lee, Orange, Person, Vance, Wake, Warren
Sandhills (South Central) -	Bladen, Columbus, Cumberland, Hoke, Montgomery, Moore, Richmond, Robeson, Sampson, Scotland
Northeast -	Beaufort, Bertie, Camden, Chowan, Currituck, Dare, Edgecombe, Gates, Halifax, Hertford, Hyde, Martin, Nash, Northampton, Pasquotank, Perquimans, Pitt, Tyrrell, Washington, Wilson
Southeast -	Brunswick, Carteret, Craven, Duplin, Greene, Jones, Lenoir, New Hanover, Onslow, Pamlico, Pender, Wayne