July 2017 Monthly Lodging Report (Smith Travel Research)

Statewide

- Hotel/motel occupancy decreased 2.4% statewide in July 2017 from July 2016.
  - US occupancy decreased 0.5% in July 2017 from July 2016.
  - South Atlantic states occupancy decreased 0.3% in July 2017 from July 2016.

- July 2017 room rates (ADR) in North Carolina were up 2.2%.
  - Room rates in the US increased 1.4% from July 2016.
  - Room rates in the South Atlantic states increased 2.3% from July 2016.

- Statewide, RevPAR was down 0.3% from July of 2016.
  - US RevPAR increased 0.8% from July 2016.
  - South Atlantic RevPAR increased 2.0% from July 2016.

- Room Supply increased by 2.4% in the state from July 2016 to July 2017.
  - US room supply increased 1.9% in July 2017.
  - South Atlantic room supply was up 1.6% from July 2016 to July 2017.

- Room Demand was flat (0.0%) in the state from July 2016 to July 2017.
  - Room demand in the US increased 1.4% in July 2017 from July 2016.
  - Room demand in the South Atlantic increased 1.3% in July 2017 from July 2016.

- North Carolina room revenues increased 2.2% in July 2017.
  - Room revenues in the US increased 2.7% from July 2016 to July 2017.
  - Room revenues in the South Atlantic increased 3.7% from July 2016 to July 2017.

Regional

- Of the eight regions, only the North Central Region showed an increase in occupancy rates for July 2017 from July 2016, with less than one percent growth in the indicator.
  - Western Region -2.2%  Piedmont Triad Region -1.0%  Northeast Region -1.4%
  - Northwest Region -5.2%  North Central Region +0.3%  Southeast Region -2.8%
  - Southwest Region -5.2%  Sandhills Region -2.6%  

- Seven of the eight zones experienced increased ADR in July 2017 from July 2016. ADR in the Sandhills Region increased more than five percent from last July and ADR in the Southeast Region increased nearly five percent.
  - Western Region +0.1%  Piedmont Triad Region +2.6%  Northeast Region +2.2%
  - Northwest Region -0.1%  North Central Region +0.8%  Southeast Region +4.5%
  - Southwest Region +3.1%  Sandhills Region +5.1%  

- RevPAR was up in five of the eight prosperity zones of the state for July 2017 from July 2016.
  - Western Region -2.0%  Piedmont Triad Region +1.6%  Northeast Region +0.7%
  - Northwest Region -5.3%  North Central Region +1.1%  Southeast Region +1.6%
  - Southwest Region -2.3%  Sandhills Region +2.4%  

- Room Supply was up in each of the eight of the regions of the state for July 2017 from July 2016, particularly in the Southwest Region.
  - Western Region +3.1%  Piedmont Triad Region +0.1%  Northeast Region +0.8%
  - Northwest Region +0.6%  North Central Region +2.5%  Southeast Region +1.2%
  - Southwest Region +5.0%  Sandhills Region +2.4%  

- Room Demand was up in two of the prosperity zones of the state for July 2017 from 2016. The North Central Region led the state with nearly three percent growth in demand, followed by the Western Region with almost one percent growth.
  - Western Region +0.8%  Piedmont Triad Region -0.9%  Northeast Region -0.7%
  - Northwest Region -4.6%  North Central Region +2.8%  Southeast Region -1.6%
  - Southwest Region -0.4%  Sandhills Region -0.3%  

- Room Revenues were up in seven of the prosperity zones of the state for July 2017 from 2016. The Sandhills Region had nearly five percent growth in revenues, while the North Central Region had nearly four percent growth.
  - Western Region +0.9%  Piedmont Triad Region +1.7%  Northeast Region +1.5%
  - Northwest Region -4.8%  North Central Region +3.7%  Southeast Region +2.8%
  - Southwest Region +2.6%  Sandhills Region +4.9%
Year-To-Date (through July 2017) Lodging Report
Statewide & Competitive State Comparison

- Regional occupancy is down 0.9% statewide YTD (through July) 2017.
  - The US occupancy is up 0.5% in 2017 from 2016.
  - The South Atlantic states occupancy is up 1.1% in 2017 from 2016.

- YTD room rates (ADR) in North Carolina are up 2.6%.
  - The US ADR is up 2.2% in 2017 from 2016.
  - The South Atlantic states ADR is up 2.6% in 2017 from 2016.

- Statewide, RevPAR is up 1.7% year-to-date.
  - Nationally, RevPAR is also up 2.7% in 2017 from 2016.
  - The South Atlantic states RevPAR is up 3.8% in 2017 from 2016.

- Room Supply is up 2.2% in the state year-to-date.
  - Nationally, room supply is also up 1.8% in 2017 from 2016.
  - The South Atlantic states room supply is up 1.5% in 2017 from 2016.

- Room Demand is up 1.4% in the state year-to-date.
  - Nationally, room demand is also up 2.3% in 2017 from 2016.
  - The South Atlantic states room demand is up 2.7% in 2017 from 2016.

- North Carolina room revenues are up 3.9% year-to-date.
  - Nationally, room revenues are also up 4.5% in 2017 from 2016.
  - The South Atlantic states room revenues are up 5.3% in 2017 from 2016.

Regional

- Occupancy in four of the eight prosperity zones of the state is up year-to-date (through July).
  - Western Region -3.4%
  - Northwest Region -2.8%
  - Southwest Region -4.3%
  - Piedmont Triad Region +1.3%
  - North Central Region +1.2%
  - Sandhills Region +3.1%
  - Northeast Region +1.8%
  - Southeast Region -1.2%

- ADR in each of the eight prosperity zones is up year-to-date through July.
  - Western Region +3.0%
  - Northwest Region +0.7%
  - Southwest Region +2.9%
  - Piedmont Triad Region +1.7%
  - North Central Region +1.3%
  - Sandhills Region +4.0%
  - Northeast Region +3.8%
  - Southeast Region +4.9%

- RevPAR is up year-to-date in five of the eight prosperity zones of the state.
  - Western Region -0.5%
  - Northwest Region -2.1%
  - Southwest Region -1.5%
  - Piedmont Triad Region +3.0%
  - North Central Region +2.5%
  - Sandhills Region +7.3%
  - Northeast Region +5.6%
  - Southeast Region +3.6%

- Room Supply is up in each of the prosperity zones year-to-date through July, particularly in the Southwest Region.
  - Western Region +2.5%
  - Northwest Region +0.6%
  - Southwest Region +4.6%
  - Piedmont Triad Region +1.1%
  - North Central Region +2.0%
  - Sandhills Region +2.7%
  - Northeast Region +0.2%
  - Southeast Region +0.6%

- Room Demand is up five of the prosperity zones of the state year-to-date through July, particularly in the Sandhills Region.
  - Western Region -1.0%
  - Northwest Region -2.2%
  - Southwest Region +0.1%
  - Piedmont Triad Region +2.3%
  - North Central Region +3.3%
  - Sandhills Region +5.9%
  - Northeast Region +2.0%
  - Southeast Region -0.6%

- Room Revenues are up in seven of the prosperity zones year-to-date through July. Revenues in the Sandhills Region are up ten percent, followed by the Northeast Region with growth of nearly six percent.
  - Western Region +1.9%
  - Northwest Region -1.5%
  - Southwest Region +3.1%
  - Piedmont Triad Region +4.1%
  - North Central Region +4.6%
  - Sandhills Region +10.2%
  - Northeast Region +5.8%
  - Southeast Region +4.3%
<table>
<thead>
<tr>
<th>Region</th>
<th>Counties</th>
</tr>
</thead>
<tbody>
<tr>
<td>Western Region -</td>
<td>Buncombe, Cherokee, Clay, Graham, Haywood, Henderson, Jackson, Macon,</td>
</tr>
<tr>
<td></td>
<td>Madison, Polk, Rutherford, Swain, Transylvania</td>
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<tr>
<td>Northwest Region -</td>
<td>Alleghany, Ashe, Alexander, Avery, Burke, Caldwell, Catawba, McDowell,</td>
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<tr>
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<td>Mitchell, Watauga, Wilkes, Yancey</td>
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<tr>
<td>Southwest</td>
<td>Anson, Cabarrus, Cleveland, Gaston, Iredell, Lincoln, Mecklenburg, Rowan,</td>
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<tr>
<td></td>
<td>Stanly, Union</td>
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<tr>
<td>Piedmont-Triad (Central)</td>
<td>Alamance, Caswell, Davidson, Davie, Forsyth, Guilford, Randolph, Rockingham,</td>
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<tr>
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<td>Stokes, Surry, Yadkin</td>
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<tr>
<td>North Central</td>
<td>Chatham, Durham, Franklin, Granville, Harnett, Johnston, Lee, Orange, Person,</td>
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<td></td>
<td>Vance, Wake, Warren</td>
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<tr>
<td>Sandhills (South Central)</td>
<td>Bladen, Columbus, Cumberland, Hoke, Montgomery, Moore, Richmond, Robeson,</td>
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<td>Sampson, Scotland</td>
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<tr>
<td>Northeast</td>
<td>Beaufort, Bertie, Camden, Chowan, Currituck, Dare, Edgecombe, Gates, Halifax,</td>
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<tr>
<td></td>
<td>Hertford, Hyde, Martin, Nash, Northampton, Pasquotank, Perquimans, Pitt,</td>
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<tr>
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<td>Tyrrell, Washington, Wilson</td>
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<tr>
<td>Southeast</td>
<td>Brunswick, Carteret, Craven, Duplin, Greene, Jones, Lenoir, New Hanover,</td>
</tr>
<tr>
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<td>Onslow, Pamlico, Pender, Wayne</td>
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