September 2017 Monthly Lodging Report (Smith Travel Research)

Statewide
- NC hotel/motel occupancy decreased 0.7% statewide in September 2017 from September 2016.
  - US occupancy increased 1.4% in September 2017 from September 2016.
  - South Atlantic states occupancy increased 1.8% in September 2017 from September 2016.
- September 2017 room rates (ADR) in North Carolina were up 3.8%.
  - Room rates in the US increased 1.0% from September 2016.
  - Room rates in the South Atlantic states increased 1.8% from September 2016.
- Statewide, RevPAR was up 3.0% from September of 2016.
  - US RevPAR increased 2.4% from September 2016.
  - South Atlantic RevPAR increased 3.6% from September 2016.
- Room Supply increased by 2.7% in the state from September 2016 to September 2017.
  - US room supply increased 1.9% in September 2017.
  - South Atlantic room supply was up 1.6% from September 2016 to September 2017.
- Room Demand increased 1.9% in the state from September 2016 to September 2017.
  - Room demand in the US increased 3.3% in September 2017 from September 2016.
  - Room demand in the South Atlantic increased 3.4% in September 2017 from September 2016.
- North Carolina room revenues increased 5.8% in September 2017.
  - Room revenues in the US increased 4.4% from September 2016 to September 2017.
  - Room revenues in the South Atlantic increased 5.3% from September 2016 to September 2017.

Regional
- Of the eight regions, four of them showed an increase in occupancy rates for September 2017 from September 2016, with the Sandhills Region leading the regions in growth with more than three percent.
  - Western Region +0.9%  Piedmont Triad Region +0.5%  Northeast Region -4.8%
  - Northwest Region -6.8%  North Central Region +0.9%  Southeast Region -6.9%
  - Southwest Region 0.0%  Sandhills Region +3.1%
- Each of the eight zones experienced increased ADR in September 2017 from September 2016. ADR in the Sandhills Region increased seven percent from last September and ADR in the Western and Southwest regions increased five percent.
  - Western Region +5.0%  Piedmont Triad Region +3.2%  Northeast Region +1.6%
  - Northwest Region +1.0%  North Central Region +2.1%  Southeast Region +1.8%
  - Southwest Region +5.0%  Sandhills Region +7.0%
- RevPAR was up in five of the eight prosperity zones of the state for September 2017 from September 2016.
  - Western Region +5.9%  Piedmont Triad Region +3.7%  Northeast Region -3.3%
  - Northwest Region -5.9%  North Central Region +3.0%  Southeast Region -5.2%
  - Southwest Region +5.0%  Sandhills Region +10.4%
- Room Supply was up in each of the eight of the regions of the state for September 2017 from September 2016, particularly in the Southwest Region.
  - Western Region +3.0%  Piedmont Triad Region +0.6%  Northeast Region +0.8%
  - Northwest Region +0.6%  North Central Region +2.9%  Southeast Region +1.3%
  - Southwest Region +5.2%  Sandhills Region +2.8%
- Room Demand was up in five of the prosperity zones of the state for September 2017 from 2016. The Sandhills Region led the state with six percent growth in demand, followed by the Southwest Region with five percent growth.
  - Western Region +3.8%  Piedmont Triad Region +1.0%  Northeast Region -4.0%
  - Northwest Region -6.2%  North Central Region +3.8%  Southeast Region -5.6%
  - Southwest Region +5.1%  Sandhills Region +6.0%
- Room Revenues were up in five of the prosperity zones of the state for September 2017 from 2016. The Sandhills Region had thirteen percent growth in revenues, while the Southwest Region had ten percent growth.
  - Western Region +9.0%  Piedmont Triad Region +4.3%  Northeast Region -2.5%
  - Northwest Region -5.3%  North Central Region +6.0%  Southeast Region -3.9%
  - Southwest Region +10.4%  Sandhills Region +13.4%
Regional

- **Occupancy** in four of the eight prosperity zones of the state is up year-to-date (through September).
  - Western Region -2.5%
  - Northwest Region -3.6%
  - Southwest Region -3.5%
  - Piedmont Triad Region +1.3%
  - North Central Region +1.0%
  - Sandhills Region +2.2%
  - Northeast Region +0.3%
  - Southeast Region -2.2%

- **ADR** in each of the eight prosperity zones is up year-to-date through September.
  - Western Region +3.4%
  - Northwest Region +0.7%
  - Southwest Region +3.8%
  - Piedmont Triad Region +2.4%
  - North Central Region +1.4%
  - Sandhills Region +4.4%
  - Northeast Region +2.8%
  - Southeast Region +4.2%

- **RevPAR** is up year-to-date in seven of the eight prosperity zones of the state.
  - Western Region +0.9%
  - Northwest Region -3.0%
  - Southwest Region +0.2%
  - Piedmont Triad Region +3.7%
  - North Central Region +2.4%
  - Sandhills Region +6.7%
  - Northeast Region +3.1%
  - Southeast Region +2.0%

- **Room Supply** is up in each of the prosperity zones year-to-date through September, particularly in the Southwest Region.
  - Western Region +2.6%
  - Northwest Region +0.6%
  - Southwest Region +4.7%
  - Piedmont Triad Region +1.0%
  - North Central Region +2.2%
  - Sandhills Region +2.7%
  - Northeast Region +0.3%
  - Southeast Region +0.8%

- **Room Demand** is up five of the prosperity zones of the state year-to-date through September, particularly in the Sandhills Region.
  - Western Region 0.0%
  - Northwest Region -3.0%
  - Southwest Region +1.0%
  - Piedmont Triad Region +2.3%
  - North Central Region +3.2%
  - Sandhills Region +4.9%
  - Northeast Region +0.7%
  - Southeast Region -1.4%

- **Room Revenues** are up in seven of the prosperity zones year-to-date through September. Revenues in the Sandhills Region are up more than nine percent, followed by the Southwest, Piedmont Triad and North Central regions with growth of nearly five percent.
  - Western Region +3.5%
  - Northwest Region +2.4%
  - Southwest Region +4.9%
  - Piedmont Triad Region +4.7%
  - North Central Region +4.7%
  - Sandhills Region +9.5%
  - Northeast Region +3.4%
  - Southeast Region +2.8%
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


Southeast - Brunswick, Carteret, Craven, Duplin, Greene, Jones, Lenoir, New Hanover, Onslow, Pamlico, Pender, Wayne