

June 2020 Monthly Lodging Report (Smith Travel Research)

Statewide

- NC hotel/motel **occupancy** decreased 37.1% statewide in June 2020 from June 2019 (two-year change, -36.9%).
 - US **occupancy** decreased 42.5% in June 2020 from June 2019 (two-year change, -43.3%).
 - South Atlantic states **occupancy** decreased 39.8% in June 2020 from June 2019 (two-year change, -41.3%).
- June 2020 **room rates (ADR)** in North Carolina were down 20.2% (two-year change, -17.9%).
 - **Room rates** in the US decreased 31.5% from June 2019 (two-year change, -30.9%).
 - **Room rates** in the South Atlantic states decreased 21.6% from June 2019 (two-year change, -21.1%)
- Statewide, **RevPAR** was down 49.8% from June of 2019 (two-year change, -48.2%).
 - US **RevPAR** decreased 60.6% from June 2019 (two-year change, -60.8%).
 - South Atlantic **RevPAR** decreased 52.8% from June 2019 (two-year change, -53.7%).
- **Room Supply** decreased by 0.6% in the state from June 2019 to June 2020 (two-year change -0.1%).
 - US **room supply** decreased 6.2% in June 2020 (two-year change, -4.4%).
 - South Atlantic **room supply** was down 6.1% from June 2019 to June 2020 (two-year change, -4.3%).
- **Room Demand** decreased 37.5% in the state from June 2019 to June 2020 (two-year change -36.9%).
 - **Room demand** in the US decreased 46.1% in June 2020 from June 2019 (two-year change, -45.8%).
 - **Room demand** in the South Atlantic decreased 43.4% in June 2020 from June 2019 (two-year change, -43.8%).
- North Carolina **room revenues** decreased 50.1% in June 2020 (two-year change -48.2%).
 - **Room revenues** in the US decreased 63.1% from June 2019 to June 2020 (two-year change, -62.5%).
 - **Room revenues** in the South Atlantic decreased 55.6% from June 2019 to June 2020 (two-year change, -55.7%).

Regional, June 2020

- **Occupancy**
 - Western Region -38.3% (-39.9%)
 - Northwest Region -30.3% (-36.7%)
 - Southwest Region -47.3% (-47.6%)
 - Piedmont Triad Region -36.4% (-37.7%)
 - North Central Region -44.0% (-42.3%)
 - Sandhills Region -21.2% (-18.3%)
 - Northeast Region -21.6% (-23.1%)
 - Southeast Region -24.7% (-19.6%)
- **ADR**
 - Western Region -23.4% (-23.2%)
 - Northwest Region -12.1% (-11.1%)
 - Southwest Region -31.6% (-29.3%)
 - Piedmont Triad Region -21.2% (-22.4%)
 - North Central Region -28.2% (-26.6%)
 - Sandhills Region -11.2% (-4.9%)
 - Northeast Region -2.1% (+0.6%)
 - Southeast Region -10.7% (-2.0%)
- **RevPAR**
 - Western Region -52.8% (-53.8%)
 - Northwest Region -38.8% (-43.7%)
 - Southwest Region -64.0% (-62.9%)
 - Piedmont Triad Region -49.9% (-51.7%)
 - North Central Region -59.8% (-57.7%)
 - Sandhills Region -30.0% (-22.3%)
 - Northeast Region -23.3% (-22.6%)
 - Southeast Region -32.8% (-21.2%)
- **Room Supply**
 - Western Region -6.2% (-6.5%)
 - Northwest Region -2.9% (-1.8%)
 - Southwest Region -0.4% (+2.5%)
 - Piedmont Triad Region +2.8% (+4.8%)
 - North Central Region -4.6% (-3.6%)
 - Sandhills Region +0.8% (+2.3%)
 - Northeast Region +1.9% (+2.0%)
 - Southeast Region +7.1% (-1.1%)
- **Room Demand**
 - Western Region -42.1% (-43.8%)
 - Northwest Region -32.3% (-37.8%)
 - Southwest Region -47.6% (-46.3%)
 - Piedmont Triad Region -34.6% (-34.7%)
 - North Central Region -46.6% (-44.4%)
 - Sandhills Region -20.6% (-16.5%)
 - Northeast Region -20.1% (-21.6%)
 - Southeast Region -19.4% (-20.5%)
- **Room Revenues**
 - Western Region -55.7% (-56.8%)
 - Northwest Region -40.6% (-44.7%)
 - Southwest Region -64.1% (-62.0%)
 - Piedmont Triad Region -48.5% (-49.4%)
 - North Central Region -61.6% (-59.2%)
 - Sandhills Region -29.5% (-20.5%)
 - Northeast Region -21.8% (-21.1%)
 - Southeast Region -28.0% (-22.1%)

Year-To-Date (through June 2020) Lodging Report

Statewide & Competitive State Comparison

- Hotel/motel **occupancy** is down 34.5% statewide YTD (through June) 2020 (two-year change, -31.4%).
 - The US **occupancy** is down 34.5% in 2020 from 2019 (two-year change, -34.5%).
 - The South Atlantic states **occupancy** is down 33.5% in 2020 from 2019 (two-year change, -33.4%).
- YTD **room rates (ADR)** in North Carolina are down 15.1% (two-year change, -12.6%).
 - The US **ADR** is down 16.8% in 2020 from 2019 (two-year change, -15.9%).
 - The South Atlantic states **ADR** is down 12.9% in 2020 from 2019 (two-year change, -11.6%).
- Statewide, **RevPAR** is down 44.4% year-to-date (two-year change -40.0%).
 - Nationally, **RevPAR** is also down 45.5% in 2020 from 2019 (two-year change, -45.0%).
 - The South Atlantic states **RevPAR** is down 42.1% in 2020 from 2019 (two-year change, -41.1%).
- **Room Supply** is down 0.5% in the state year-to-date (two-year change, +0.0%).
 - Nationally, **room supply** is also down 4.1% in 2020 from 2019 (two-year change, -2.2%).
 - The South Atlantic states **room supply** is down 4.6% in 2020 from 2019 (two-year change, -2.7%).
- **Room Demand** is down 34.9% in the state year-to-date (two-year change, -31.4%).
 - Nationally, **room demand** is also down 37.2% in 2020 from 2019 (two-year change, -36.0%).
 - The South Atlantic states **room demand** is down 36.6% in 2020 from 2019 (two-year change, -35.2%).
- North Carolina **room revenues** are down 44.7% year-to date (two-year change, -40.1%).
 - Nationally, **room revenues** are also down 47.8% in 2020 from 2019 (two-year change, -46.2%).
 - The South Atlantic states **room revenues** are down 44.8% in 2020 from 2019 (two-year change, -42.7%).

Regional, Year-to-Date through June 2020

- **Occupancy**
 - Western Region -39.5% (-37.2%)
 - Piedmont Triad Region -34.3% (-31.9%)
 - Northeast Region -29.6% (-27.0%)
 - Northwest Region -32.7% (-33.0%)
 - North Central Region -34.8% (-31.6%)
 - Southeast Region -37.1% (-22.2%)
 - Southwest Region -35.6% (-36.3%)
 - Sandhills Region -27.2% (-21.0%)
- **ADR**
 - Western Region -15.5% (-15.4%)
 - Piedmont Triad Region -17.0% (-16.0%)
 - Northeast Region -10.0% (-5.8%)
 - Northwest Region -9.9% (-6.7%)
 - North Central Region -14.8% (-12.7%)
 - Southeast Region -12.5% (-3.9%)
 - Southwest Region -16.6% (-14.7%)
 - Sandhills Region -11.9% (-6.5%)
- **RevPAR**
 - Western Region -48.8% (-46.9%)
 - Piedmont Triad Region -45.4% (-42.8%)
 - Northeast Region -36.7% (-31.2%)
 - Northwest Region -39.4% (-37.5%)
 - North Central Region -44.4% (-40.2%)
 - Southeast Region -45.0% (-25.3%)
 - Southwest Region -46.2% (-45.7%)
 - Sandhills Region -35.9% (-26.1%)
- **Room Supply**
 - Western Region -5.7% (-5.8%)
 - Piedmont Triad Region +1.8% (+3.0%)
 - Northeast Region -0.3% (-0.7%)
 - Northwest Region -1.8% (-0.9%)
 - North Central Region -3.3% (-1.8%)
 - Southeast Region +7.5% (-2.4%)
 - Southwest Region +0.0% (+3.3%)
 - Sandhills Region +0.2% (+2.2%)
- **Room Demand**
 - Western Region -42.9% (-40.9%)
 - Piedmont Triad Region -33.1% (-29.9%)
 - Northeast Region -29.9% (-27.5%)
 - Northwest Region -33.9% (-33.6%)
 - North Central Region -36.9% (-32.8%)
 - Southeast Region -32.4% (-24.0%)
 - Southwest Region -35.5% (-34.2%)
 - Sandhills Region -27.1% (-19.3%)
- **Room Revenues**
 - Western Region -51.8% (-50.0%)
 - Piedmont Triad Region -44.4% (-41.1%)
 - Northeast Region -36.9% (-31.7%)
 - Northwest Region -40.5% (-38.1%)
 - North Central Region -46.3% (-41.3%)
 - Southeast Region -40.9% (-27.0%)
 - Southwest Region -46.2% (-43.9%)
 - Sandhills Region -35.8% (-24.5%)

North Carolina Prosperity Zones

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| 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 |