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

<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>
</tr>
<tr>
<td>Northwest Region -</td>
<td>Alleghany, Ashe, Alexander, Avery, Burke, Caldwell, Catawba, McDowell,</td>
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<tr>
<td></td>
<td>Mitchell, Watauga, Wilkes, Yancey</td>
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<tr>
<td>Southwest -</td>
<td>Anson, Cabarrus, Cleveland, Gaston, Iredell, Lincoln, Mecklenburg, Rowan,</td>
</tr>
<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>
</tr>
<tr>
<td></td>
<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>
</tr>
<tr>
<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>
</tr>
<tr>
<td></td>
<td>Sampson, Scotland</td>
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<tr>
<td>Northeast -</td>
<td>Beaufort, Bertie, Camden, Chowan, Currituck, Dare, Edgecombe, Gates, Halifax,</td>
</tr>
<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>
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<tr>
<td></td>
<td>Onslow, Pamlico, Pender, Wayne</td>
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