

South Atlantic Region Update

Secondary Metros Overview



New and improved Market Intelligence webcast series for 2026

U.S. & Macro Webcasts

2025 Format (6)

4 U.S. updates/year
2 macroeconomic updates/year

New 2026 Format (7)

5 U.S. updates/year
2 macroeconomic updates/year

Regional Webcasts

2025 Format (32)

9 regions 4x/year
Carolinas, Deserts/Mountains, Florida,
Midwest, Northeast/Mid-Atlantic,
Southeast, Texas, West Coast

New 2026 Format (36)

9 regions 4x/year*
California, Florida, Midwest (East),
Midwest (West), Northeast, Pacific &
Mountain West, South Atlantic, South
Central, Southeast

*9 regions will be split into “major” markets
and “minor” markets. Major markets will
have ~40 minute shows while minor
markets will have ~15 minute shows.

(Refer to next slide for map)

Specialty Webcasts

2025 Format (5)

2 research topics/year
3 student housing updates/year

New 2026 Format (11)

6 special research topics/year
3 industry trend topics/year
(new webcast mini-series)
2 student housing updates/year

New and improved Market Intelligence webcast series regions for 2026

Pacific & Mountain West
AZ, CO, ID, MT, NM, NV, OR, UT, WA, WY

Upper Midwest/Great Plains
IA, IL, KS, MN, MO, ND, NE, SD, WI

Northeast
CT, MA, ME, NH, NJ, NY, PA, RI, VT

Great Lake/Ohio Valley
KY, IN, MI, OH

California

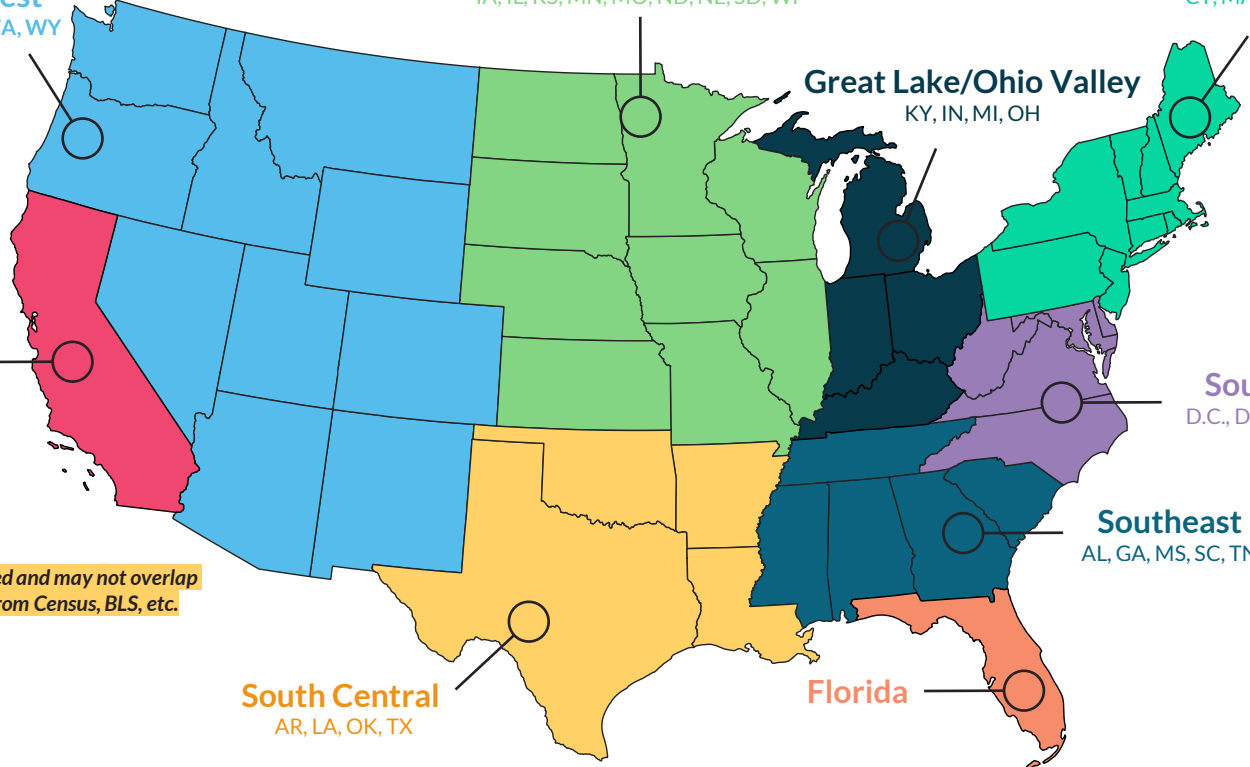
South Atlantic
D.C., DE, MD, NC, VA, WV

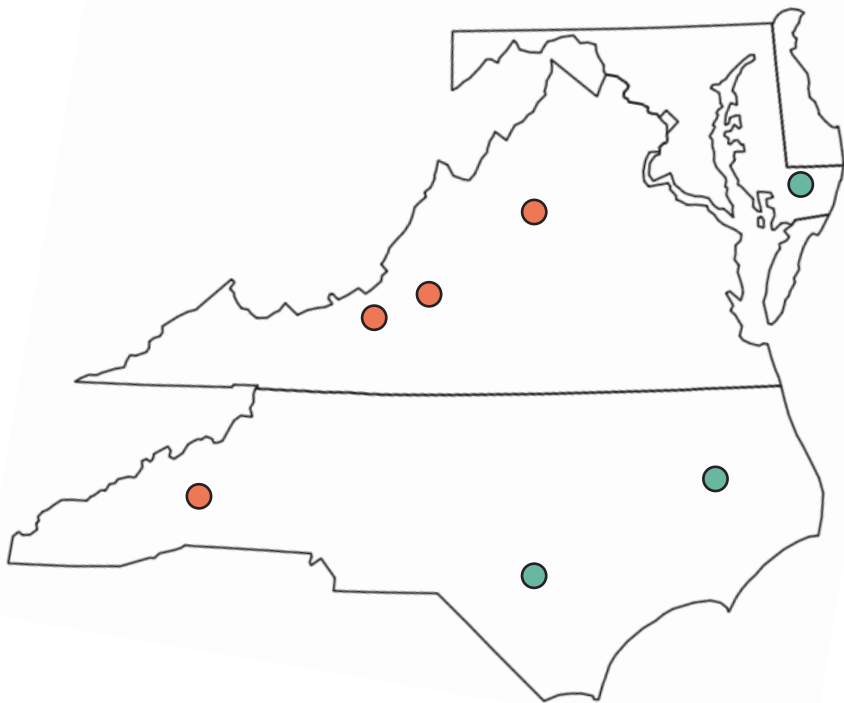
Southeast
AL, GA, MS, SC, TN

South Central
AR, LA, OK, TX

Florida

Note: Regions are RealPage-defined and may not overlap with other regional definitions from Census, BLS, etc.





South Atlantic Region: Secondary/Tertiary (Minor) Metro Areas

Blue Ridge Mountains

Boise, Boulder, Fort Collins, Greeley, Provo

Mid-Atlantic Coastal

Fayetteville, Greenville, Salisbury

South Atlantic Region: Secondary/Tertiary (Minor) Metro Areas

Data as of 1Q26

Blue Ridge Mountain Metros

Metro Area	Existing Units	Annual Supply / Demand			Y/Y Change (Rents & Occupancy)		
		Supply	% Inventory Growth	Absorption	Effective Rent Change (Y/Y)	Occupancy	Occupancy Change (Y/Y)
Asheville, NC	29,790	2,794	10.3%	2,178	-5.4%	92.9%	-1.5%
Blacksburg, VA	12,251	4	-1.4%	92	5.8%	98.5%	2.1%
Charlottesville, VA	17,561	583	3.4%	366	-2.5%	95.7%	-1.1%
Roanoke, VA	20,157	234	1.2%	174	2.8%	96.3%	-0.3%
Blue Ridge Mountains	79,759	3,615	4.7%	2,810	-1.9%	94.7%	-0.9%
U.S. Average	20.3m	367K	1.8%	303K	-0.5%	94.9%	-0.2%

South Atlantic Region: Secondary/Tertiary (Minor) Metro Areas

Forecast as of April 2026

Blue Ridge Mountain Metros

Metro Area Forecast as of Apr. 2026	2026 Forecast		
	Supply	% Inventory Growth	Y/Y Effective Rent Chg. (Annual Avg.)
Asheville, NC	1,818	6.2%	-2.2%
Blacksburg, VA	0	0.0%	4.2%
Charlottesville, VA	475	2.7%	-0.5%
Roanoke, VA	768	3.8%	2.5%
Blue Ridge Mountains	3,061	3.8%	-0.2%
U.S. Average	310K	1.5%	0.7%

South Atlantic Region: Secondary/Tertiary (Minor) Metro Areas

Data as of 1Q26

Mid-Atlantic Coastal Metros

Metro Area	Existing Units	Annual Supply / Demand			Y/Y Change (Rents & Occupancy)		
		Supply	% Inventory Growth	Absorption	Effective Rent Change (Y/Y)	Occupancy	Occupancy Change (Y/Y)
Fayetteville, NC	26,868	639	2.4%	689	1.4%	94.5%	0.3%
Greenville, NC	19,771	328	1.7%	-254	0.4%	92.8%	-2.9%
Salisbury, MD	26,515	198	0.8%	422	0.5%	95.0%	0.9%
Mid-Atlantic Coastal	73,154	1,165	1.6%	857	1.0%	94.2%	-0.3%
U.S. Average	20.3m	367K	1.8%	303K	-0.5%	94.9%	-0.2%

South Atlantic Region: Secondary/Tertiary (Minor) Metro Areas

Forecast as of April 2026

Mid-Atlantic Coastal Metros

Metro Area Forecast as of Apr. 2026	2026 Forecast		
	Supply	% Inventory Growth	Y/Y Effective Rent Chg. (Annual Avg.)
Fayetteville, NC	115	0.3%	3.4%
Greenville, NC	440	1.1%	-0.9%
Salisbury, MD	0	0.0%	3.4%
Mid-Atlantic Coastal	555	0.8%	2.4%
U.S. Average	310K	1.5%	0.7%



Q&A + APPENDIX SLIDES