

Memo

To: HAAA
From: Evelyn Fine
Date: August 15, 2017
Subject: July 2017 Occupancy & Average Daily Rate Report

Overall Daytona Beach Area Occupancy increased about 8%, to 83% in July 2017 from 78% in July 2016.

The Daytona Beach Area Average Daily Rate decreased 5%, to \$139.42 in July 2017 from \$146.68 in July 2016.

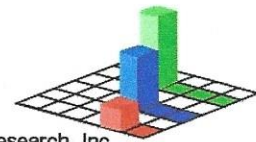
The Daytona Beach Area Revenue per Available Room increased about 2%, to \$116.28 in July 2017 from \$113.68 in July 2016.

A June overlap of the 4th of July weekend had an influence on the Occupancy and ADR during the month of July 2017, due to the lack of the additional day reported during the weekend. Racing events were held at the Speedway during the holiday weekend.

The Shriner's Imperial Session took place in Daytona Beach during the month of July. Occupancy took place mostly weeknights. Although July is generally the second highest occupancy month, clearly the Shriners had a positive affect on July 2017 Occupancy, particularly affecting mid-size properties and those with meetings and convention facilities.

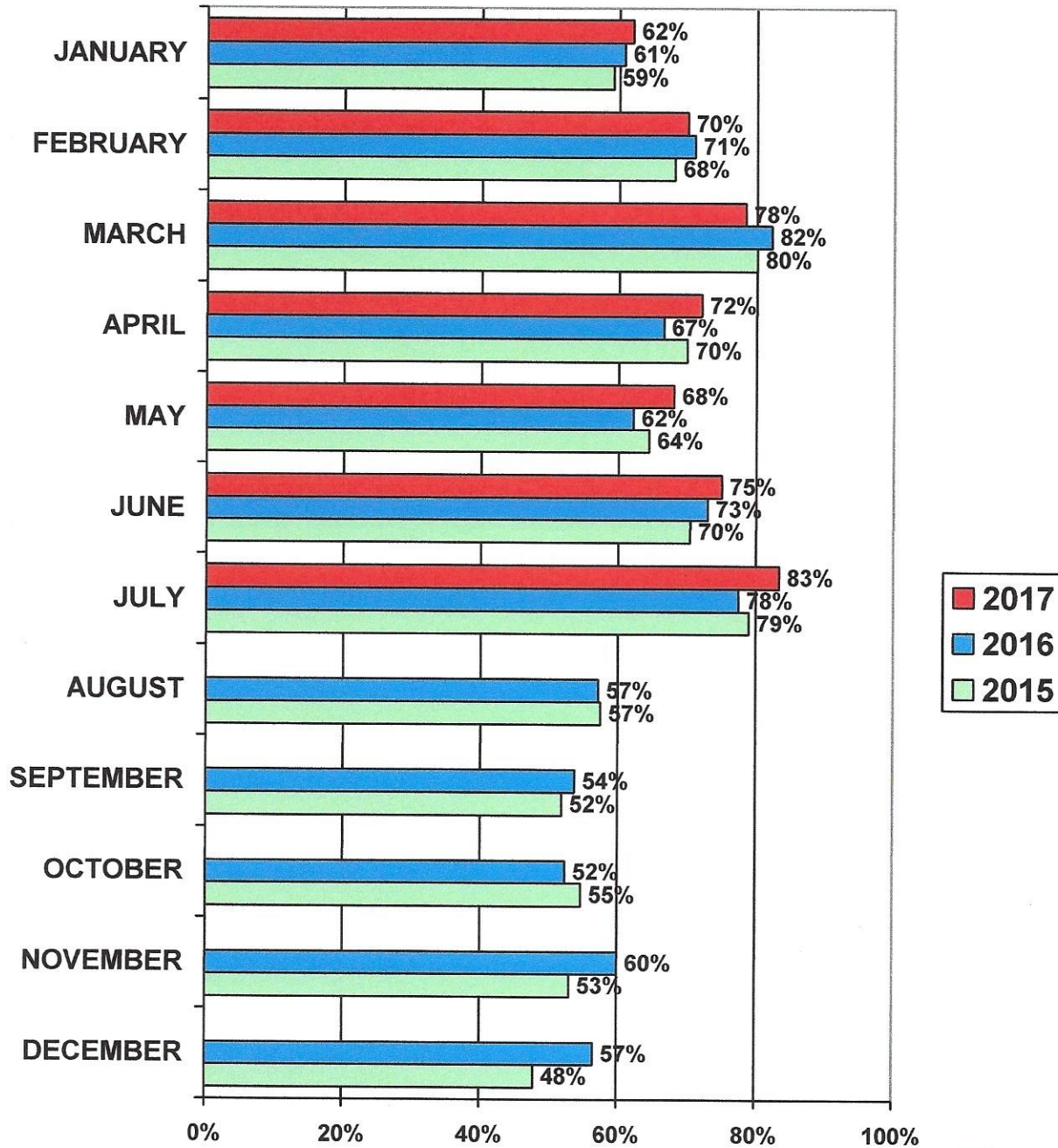
A few hotels were still not operating at 100% or were closed due to damage from Hurricane Matthew in October 2016.

Year to date occupancy is up 4%; ADR is up 4%; REVPAR is up 6%.
EF/LK



Occupancy (%)	2016												2017												Year To Date	
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	2015	2016					
This Year	61%	71%	82%	67%	62%	73%	78%	57%	54%	60%	57%	62%	70%	78%	72%	68%	75%	83%	70%	70%						
Last Year	59%	68%	80%	70%	64%	70%	79%	52%	52%	53%	48%	81%	71%	82%	87%	62%	73%	78%	69%	70%						
Percent Change	3%	4%	3%	5%	-4%	4%	-2%	0%	4%	13%	18%	2%	-1%	-5%	8%	9%	3%	8%	1%	0%						
ADR																										
This Year	\$109.44	\$148.73	\$148.81	\$116.23	\$115.81	\$121.90	\$146.68	\$106.48	\$93.37	\$112.98	\$105.55	\$116.51	\$163.51	\$156.46	\$123.62	\$119.04	\$128.45	\$139.42	\$123.87	\$130.74						
Last Year	\$101.13	\$147.07	\$143.85	\$117.30	\$107.58	\$111.55	\$131.98	\$101.59	\$92.93	\$103.80	\$88.76	\$109.44	\$148.73	\$148.81	\$116.23	\$115.81	\$111.55	\$146.68	\$117.49	\$123.87						
Percent Change	8%	0%	3%	-1%	8%	9%	11%	5%	0%	9%	19%	6%	10%	5%	7%	3%	5%	-8%	5%	6%						
RevPAR																										
This Year	\$66.52	\$104.77	\$122.29	\$77.30	\$71.98	\$88.93	\$113.68	\$60.86	\$50.18	\$59.14	\$59.67	\$72.19	\$114.44	\$122.67	\$89.17	\$72.52	\$96.44	\$116.28	\$86.69	\$92.08						
Last Year	\$59.82	\$100.18	\$114.52	\$81.94	\$68.89	\$78.55	\$103.06	\$57.72	\$48.21	\$56.74	\$42.04	\$66.52	\$104.77	\$122.29	\$77.30	\$71.98	\$78.55	\$113.68	\$60.87	\$86.69						
Percent Change	11%	4%	7%	-6%	4%	13%	10%	5%	4%	4%	42%	8%	9%	0%	15%	1%	8%	2%	7%	6%						
Supply																										
This Year	163,214	154,009	172,285	166,700	172,276	165,772	155,015	159,773	151,416	134,033	125,375	137,718	138,610	151,075	147,446	171,349	162,986	168,781	999,505	994,256						
Last Year	167,706	155,707	170,481	167,687	170,041	167,883	173,872	169,784	159,045	172,169	146,622	167,706	155,707	170,481	167,687	172,276	165,772	155,015	957,454	989,505						
Percent Change	-3%	-1%	1%	-1%	1%	-1%	-11%	-6%	-5%	-22%	-25%	-18%	-11%	-11%	-12%	-1%	-2%	9%	4%	-1%						

DAYTONA BEACH HOTEL/MOTEL OCCUPANCY 2015 - 2017

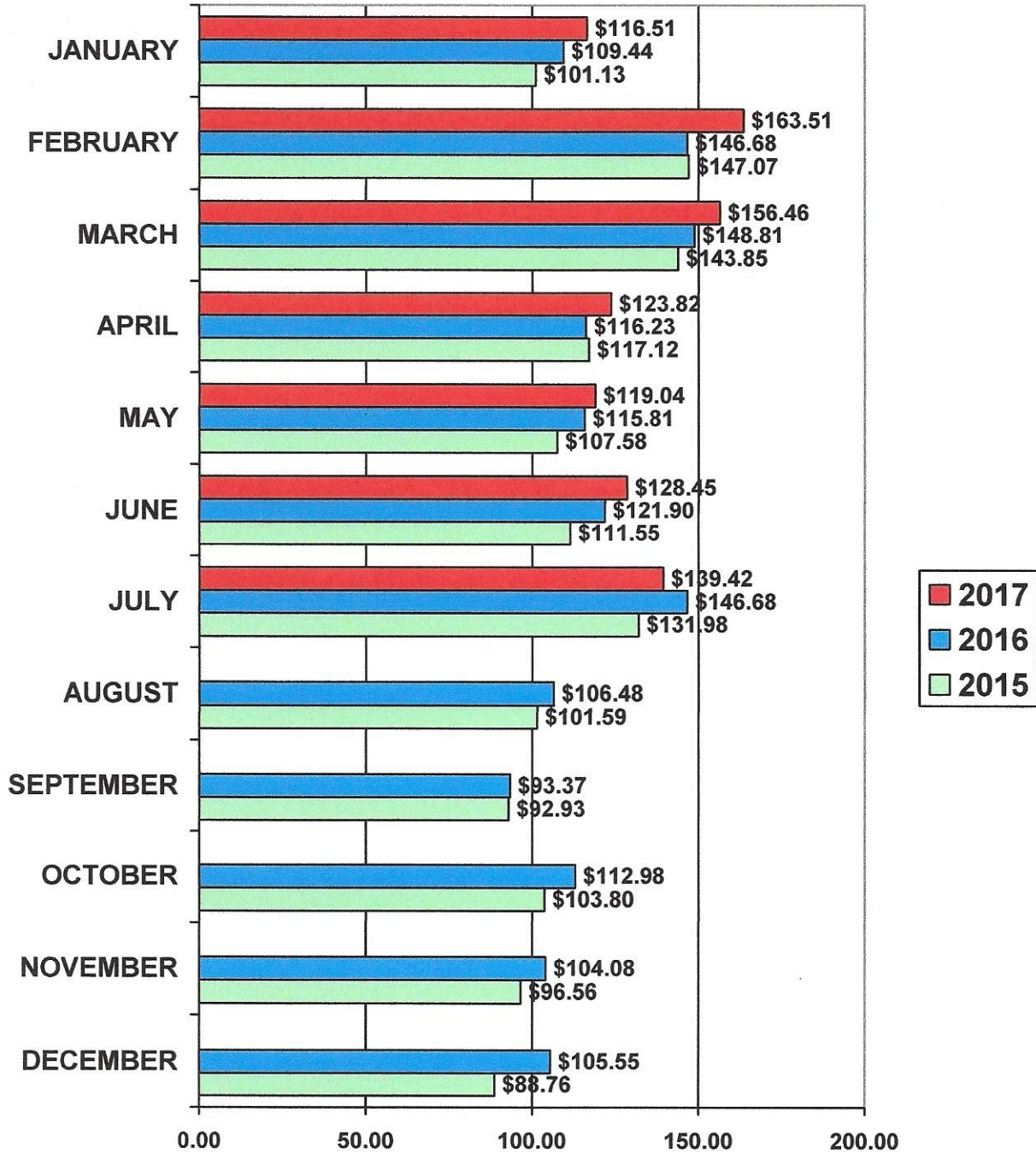


2017 YTD AVG. 73% JULY 2017 HIGH 100%
2016 YTD AVG. 70% JULY 2017 LOW 17%
2015 YTD AVG. 70%

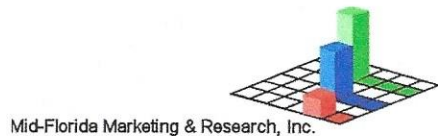
Mid-Florida Marketing & Research, Inc.



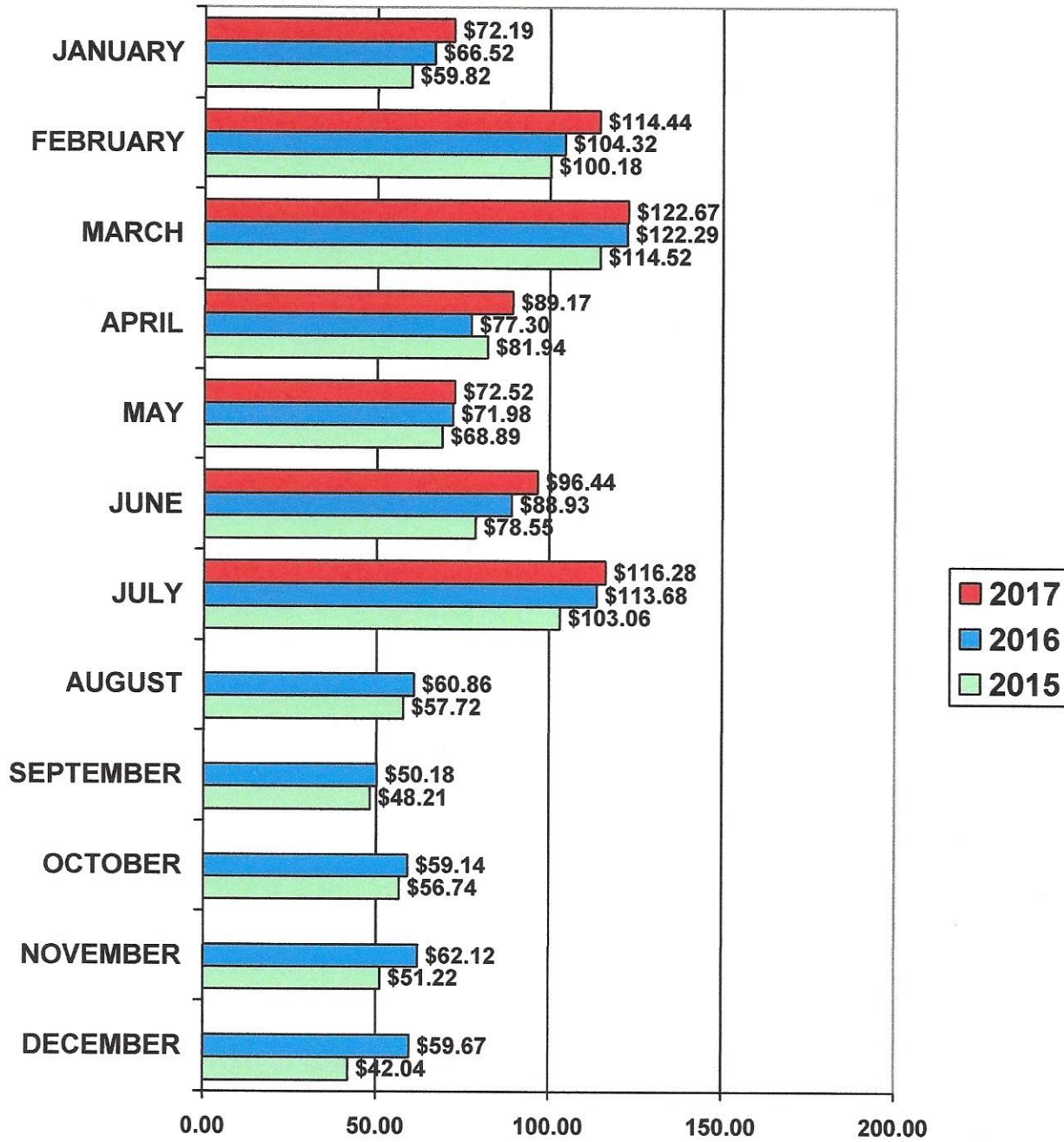
DAYTONA BEACH HOTEL/MOTEL AVERAGE DAILY RATE 2015 - 2017



2017 YTD AVG. \$135.93 JULY 2017 HIGH \$201.84
2016 YTD AVG. \$130.74 JULY 2017 LOW \$ 75.60
2015 YTD AVG. \$123.87

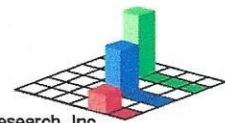


DAYTONA BEACH HOTEL/MOTEL REV PAR BY MONTH 2015 - 2017

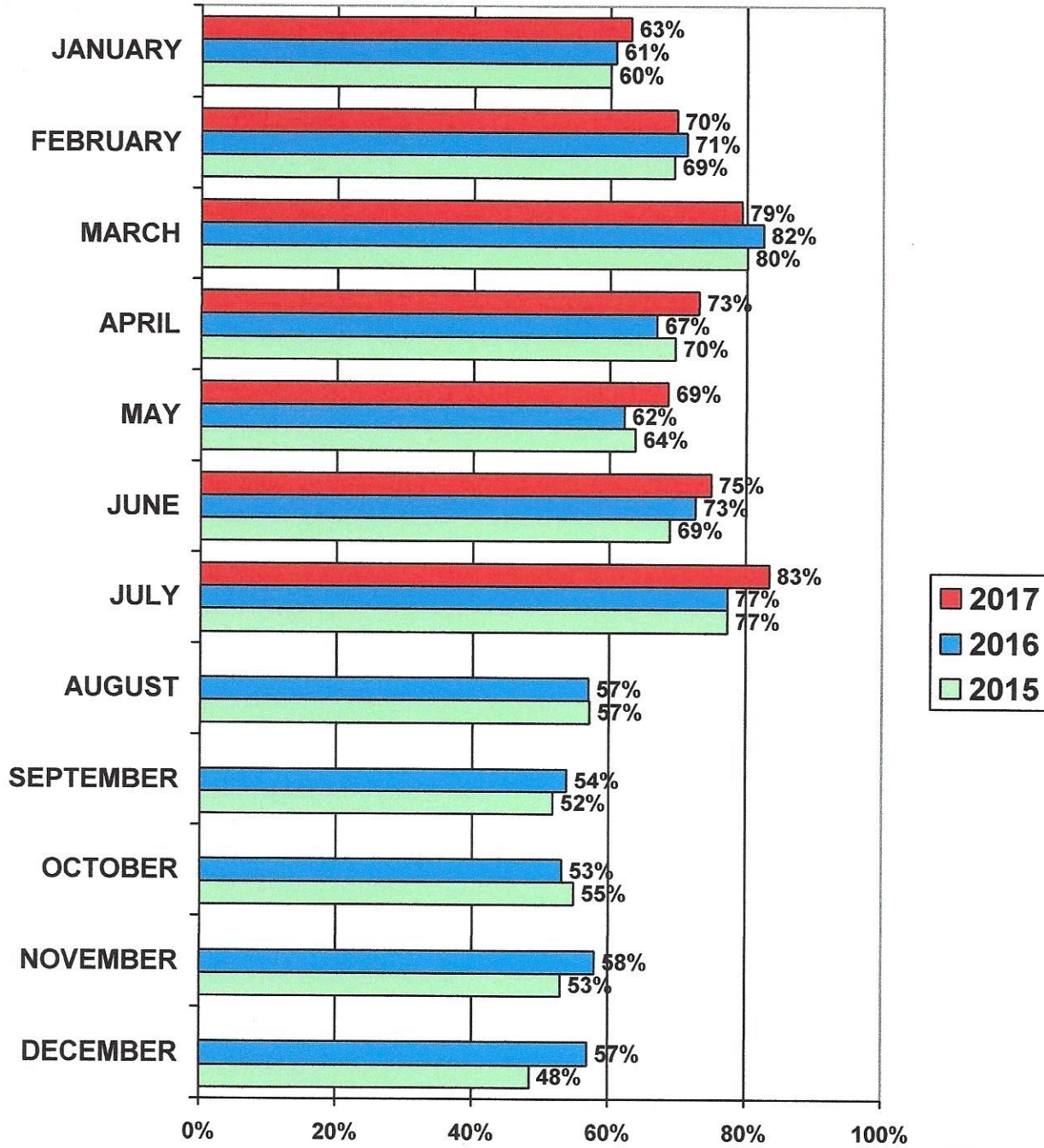


2017 YTD AVG. \$ 97.37
2016 YTD AVG. \$ 92.08
2015 YTD AVG. \$ 86.69

Mid-Florida Marketing & Research, Inc.



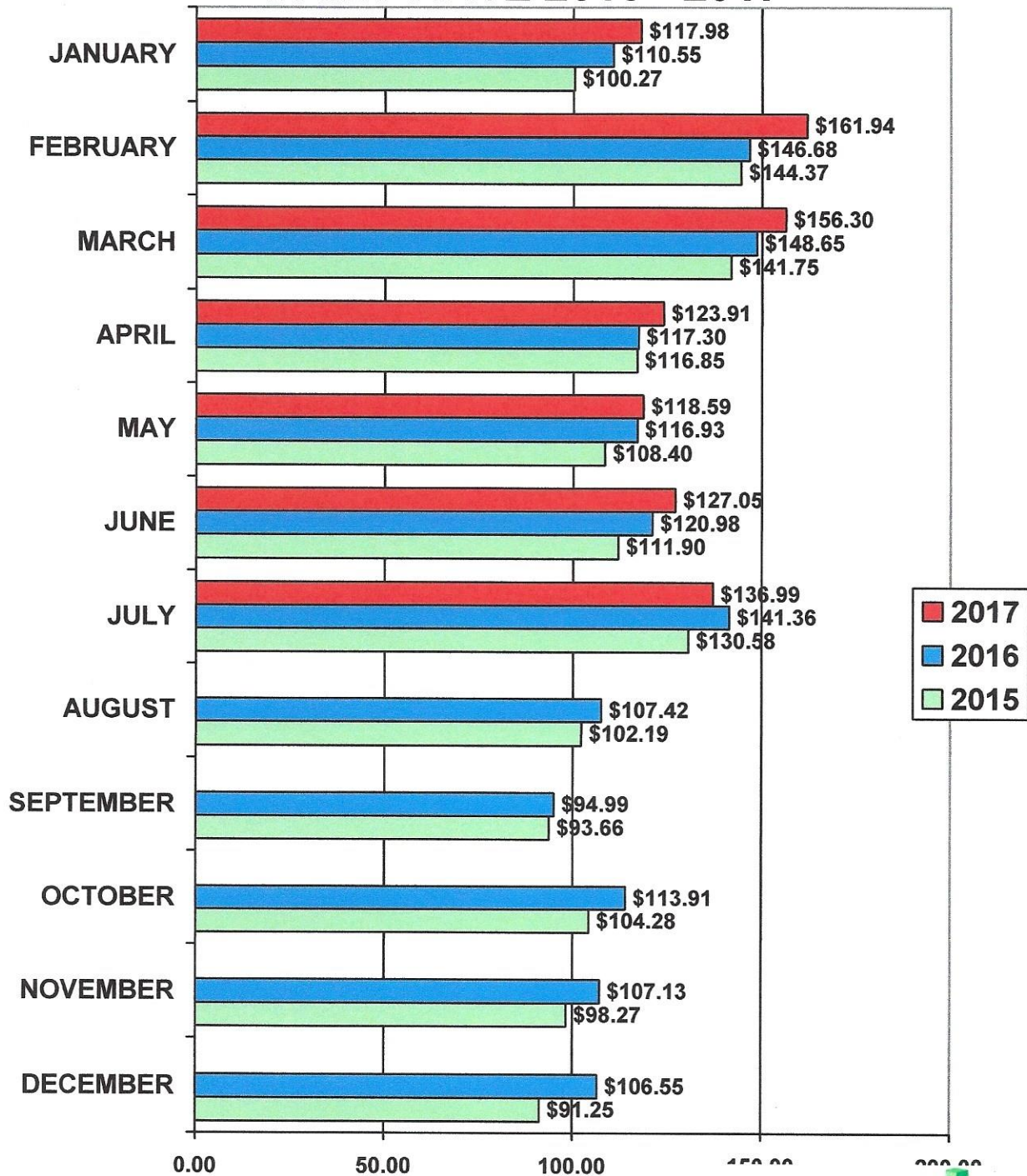
VOLUSIA HOTEL/MOTEL OCCUPANCY 2015 - 2017



2017 YTD AVG. 73% **JULY 2017 HIGH 100%**
2016 YTD AVG. 71% **JULY 2017 LOW 17%**
2015 YTD AVG. 70%



VOLUSIA HOTEL/MOTEL AVERAGE DAILY RATE 2015 - 2017

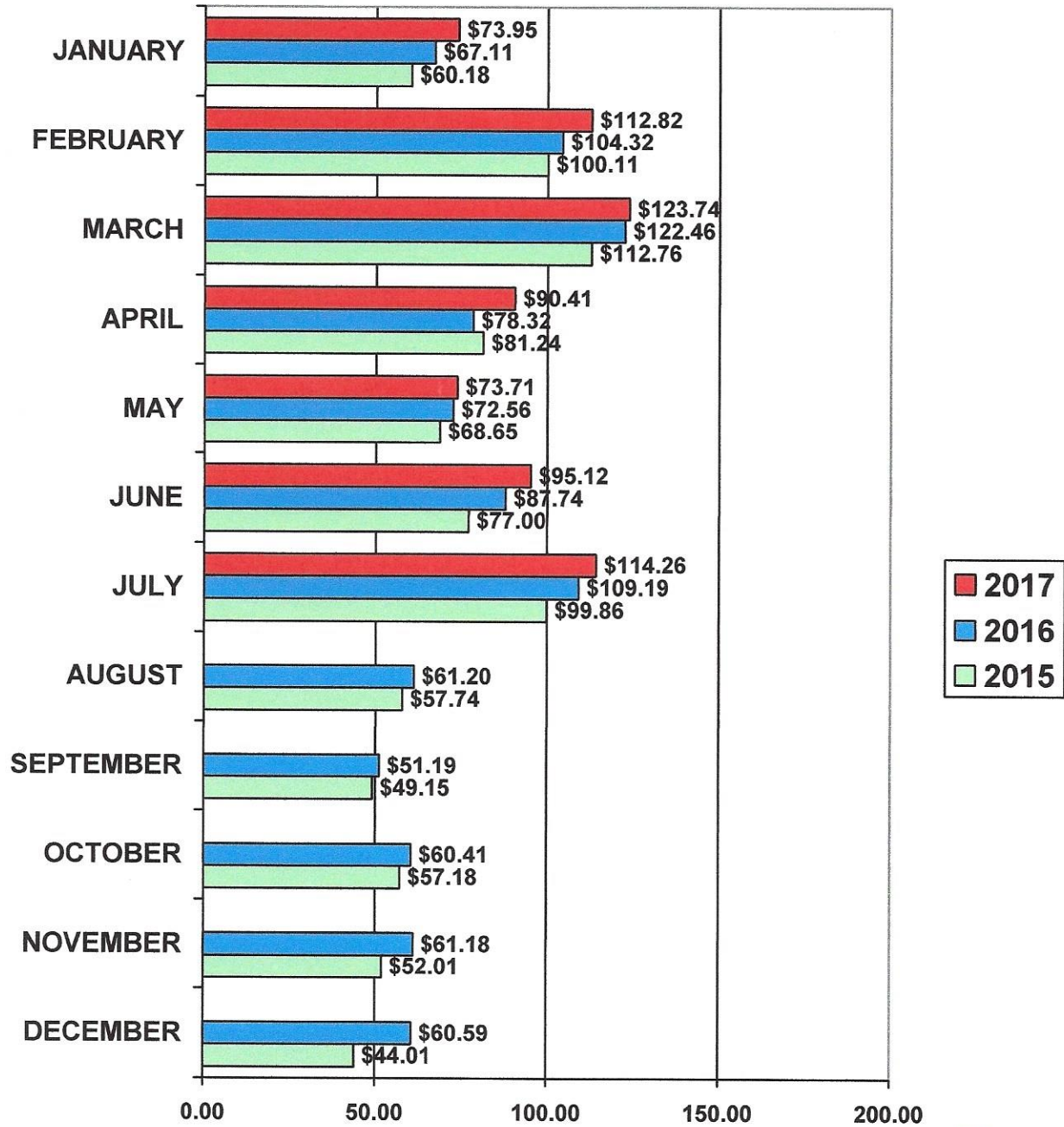


2017 YTD AVG. \$135.07 JULY 2017 HIGH \$201.84
2016 YTD AVG. \$130.20 JULY 2017 LOW \$ 70.00
2015 YTD AVG. \$122.95

Mid-Florida Marketing & Research, Inc.

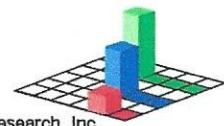


VOLUSIA HOTEL/MOTEL REV PAR BY MONTH 2015 - 2017

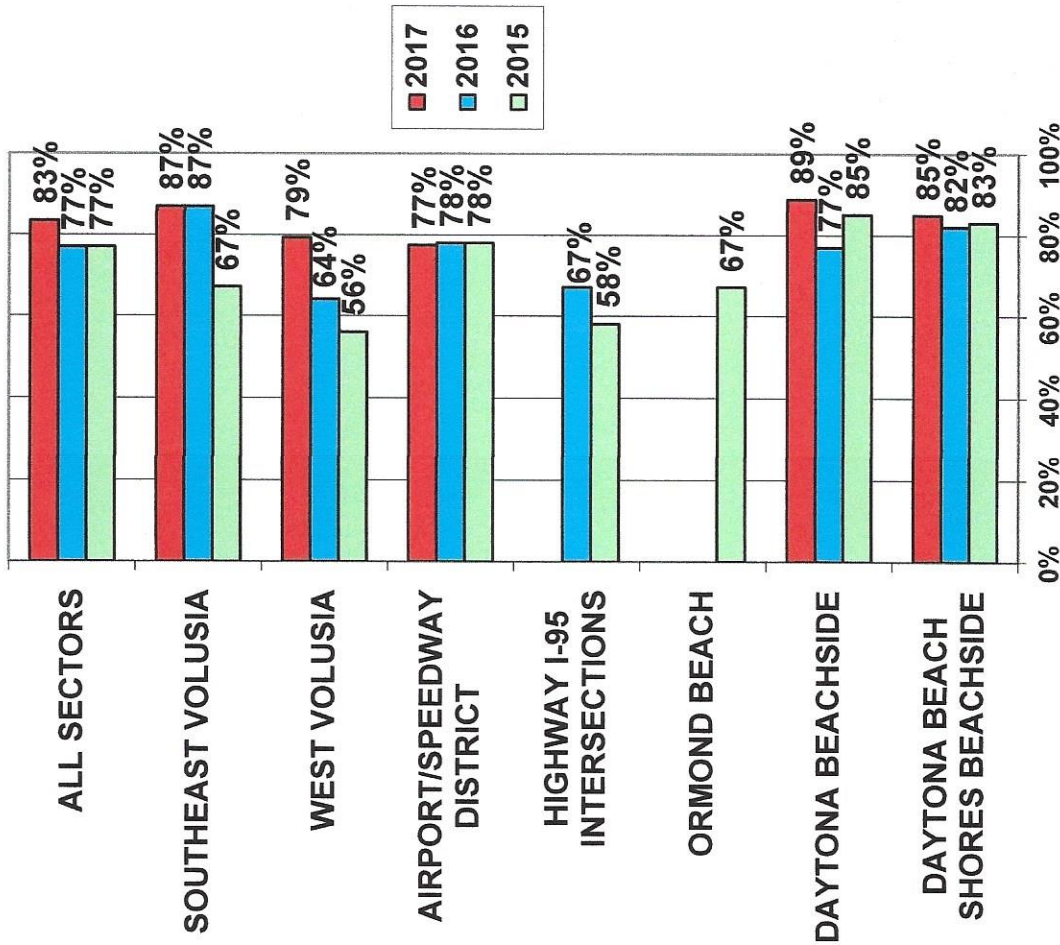


2017 YTD AVG. \$ 97.40
2016 YTD AVG. \$ 91.75
2015 YTD AVG. \$ 85.59

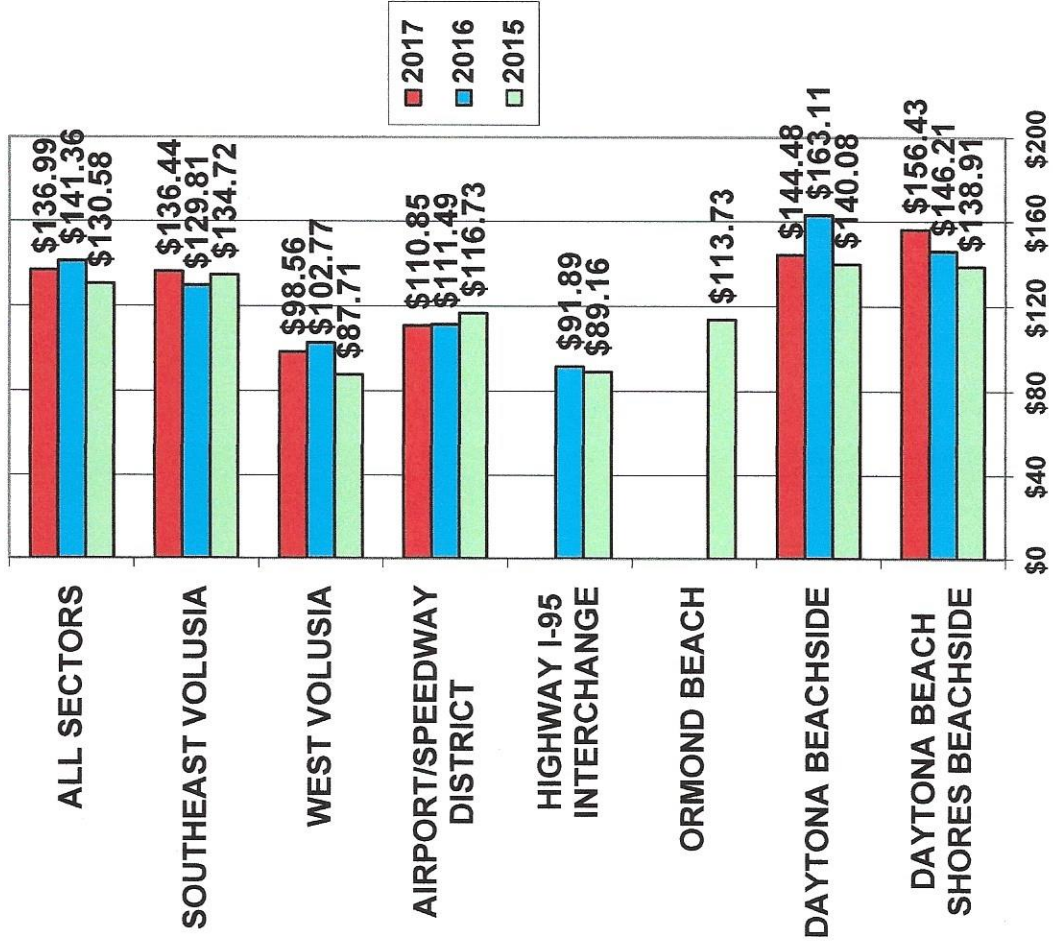
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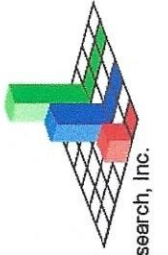
**VOLUSIA OCCUPANCY BY
AREA SECTORS -
JULY 2015 - 2017**



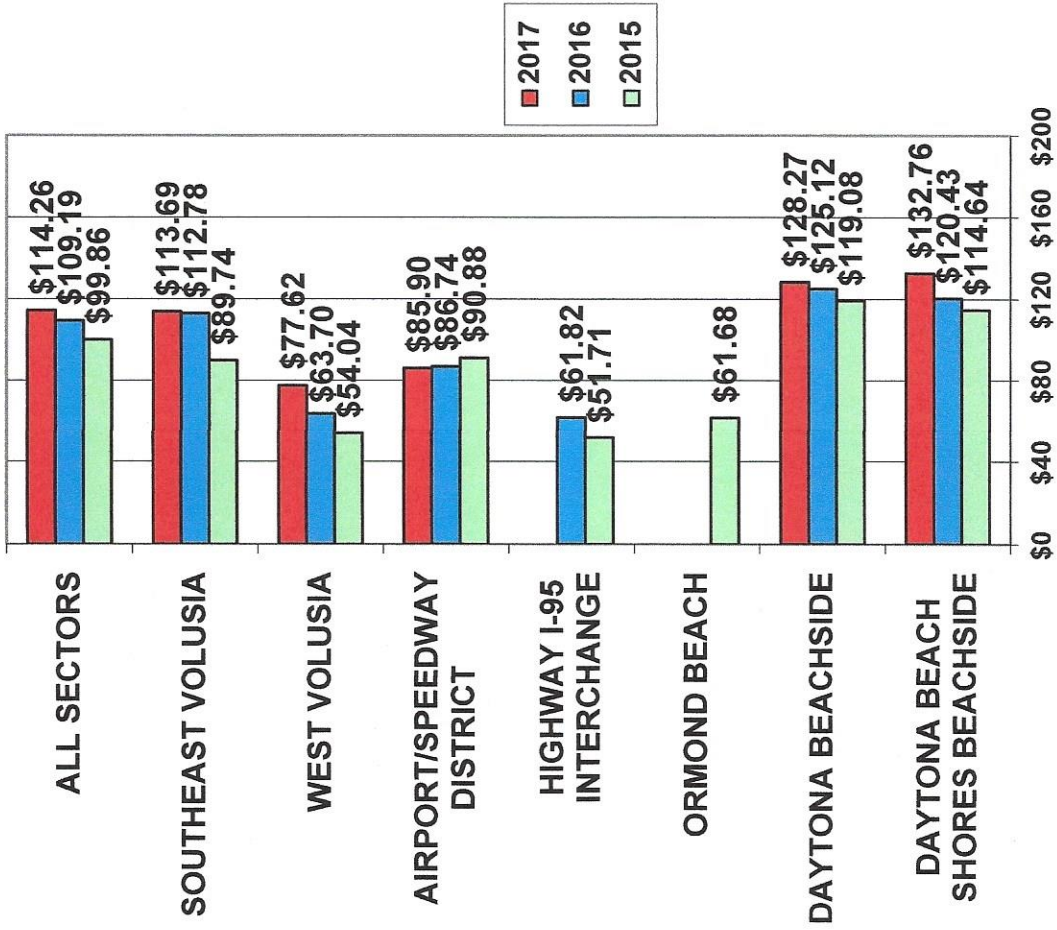
**VOLUSIA AVERAGE DAILY RATE BY
AREA SECTORS -
JULY 2015 - 2017**



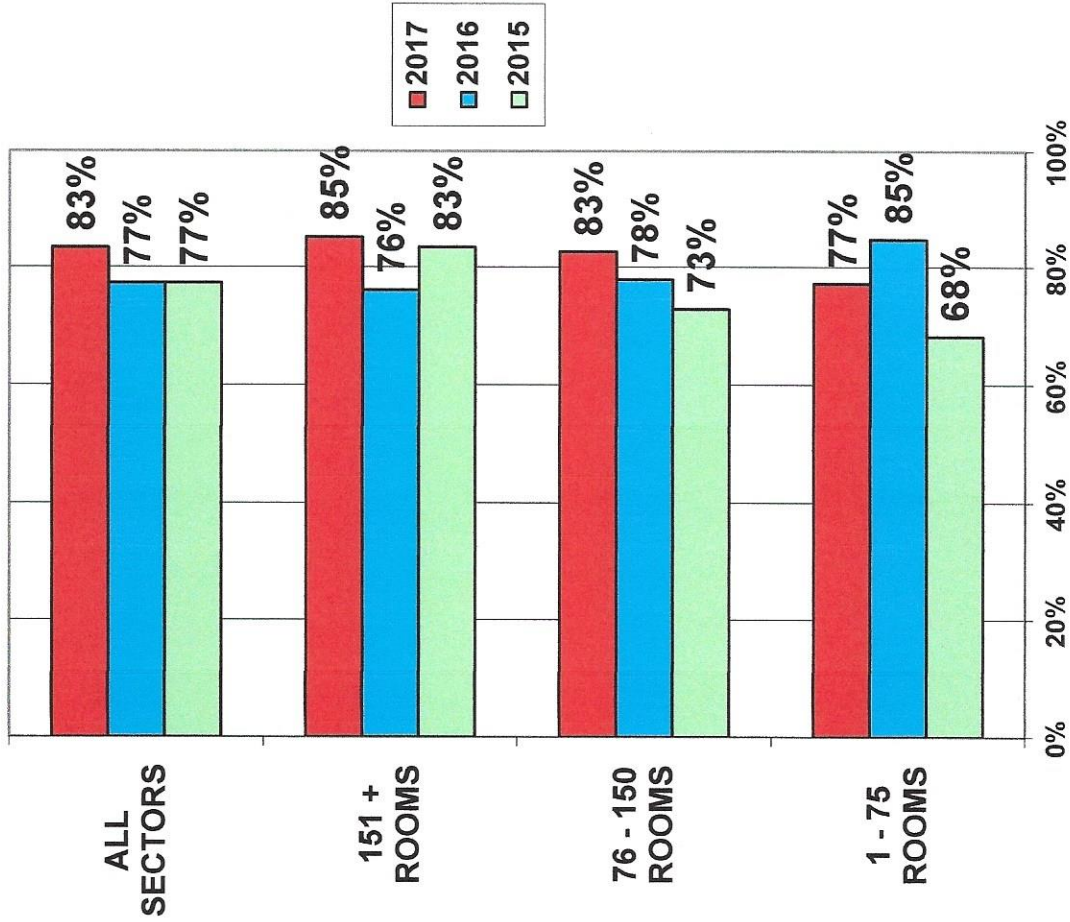
AREA SECTORS WITH FEWER THAN FIVE PROPERTIES REPORTING ARE NOT INCLUDED.



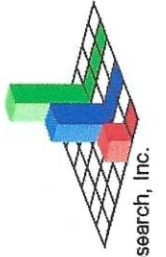
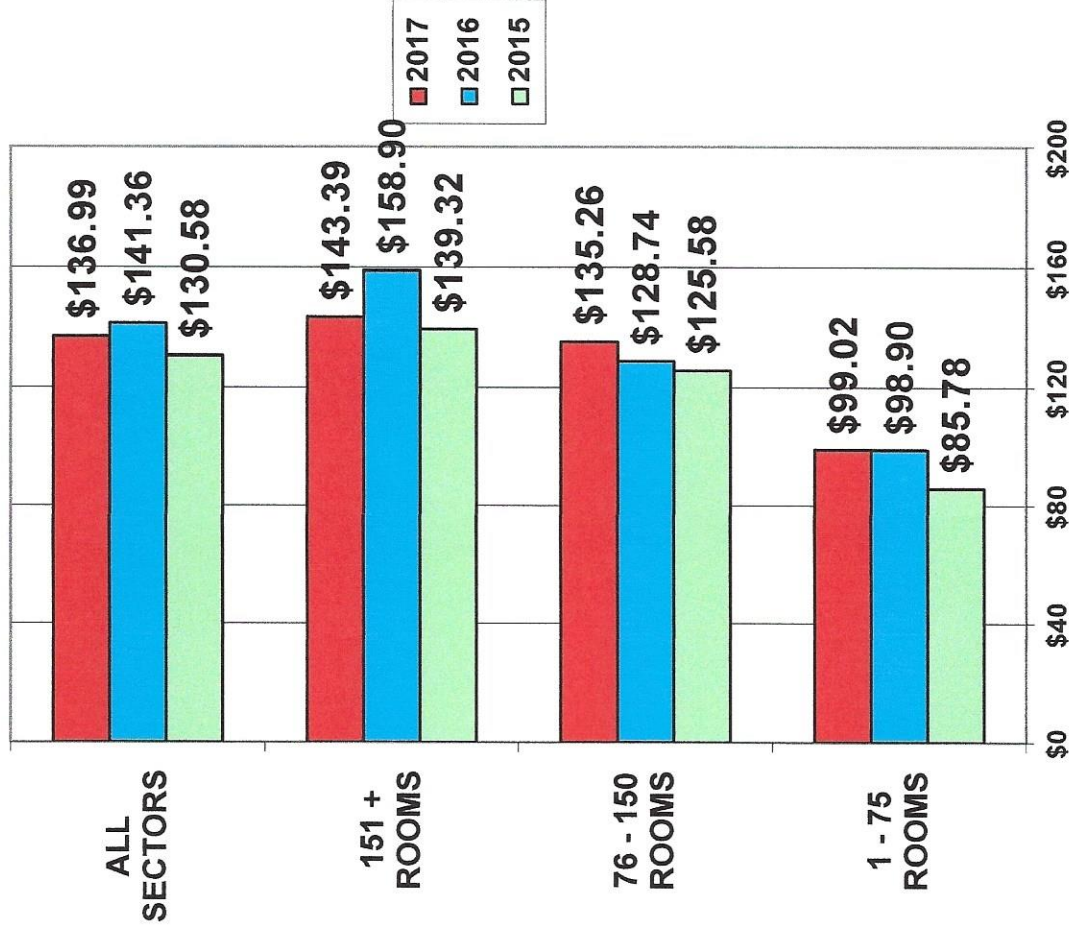
**VOLUSIA REV/PAR
BY AREA SECTORS -
JULY 2015 - 2017**



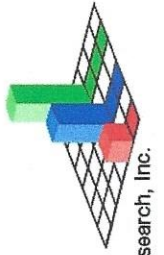
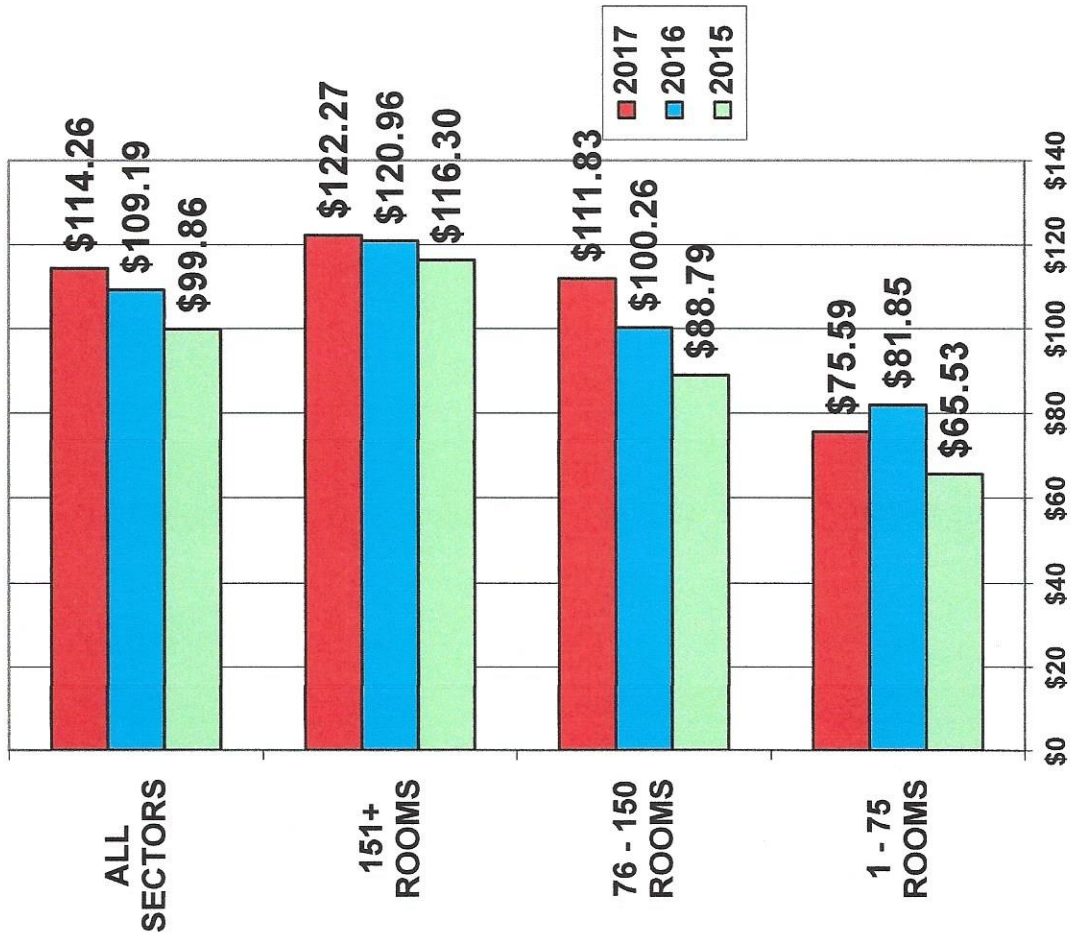
**VOLUSIA OCCUPANCY BY
PROPERTY SIZE -
JULY 2015 - 2017**



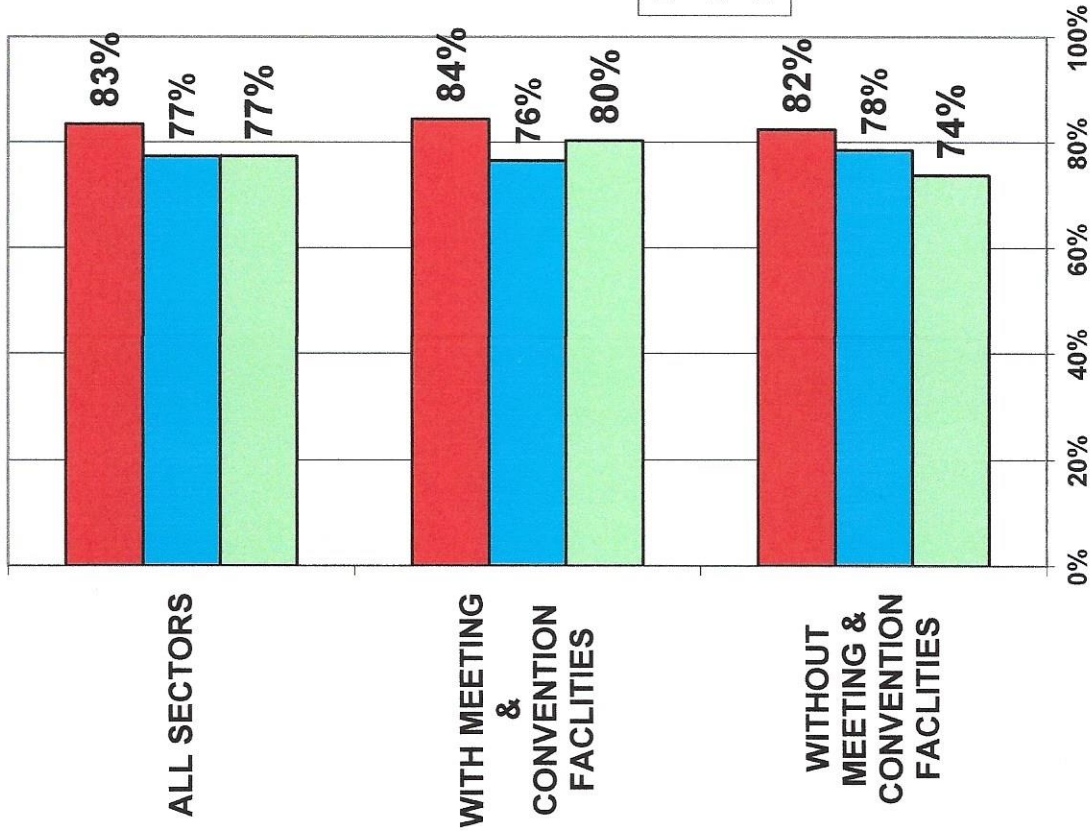
**VOLUSIA AVERAGE DAILY RATE BY
PROPERTY SIZE -
JULY 2015 - 2017**



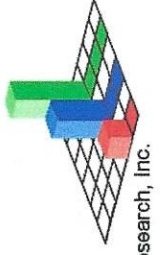
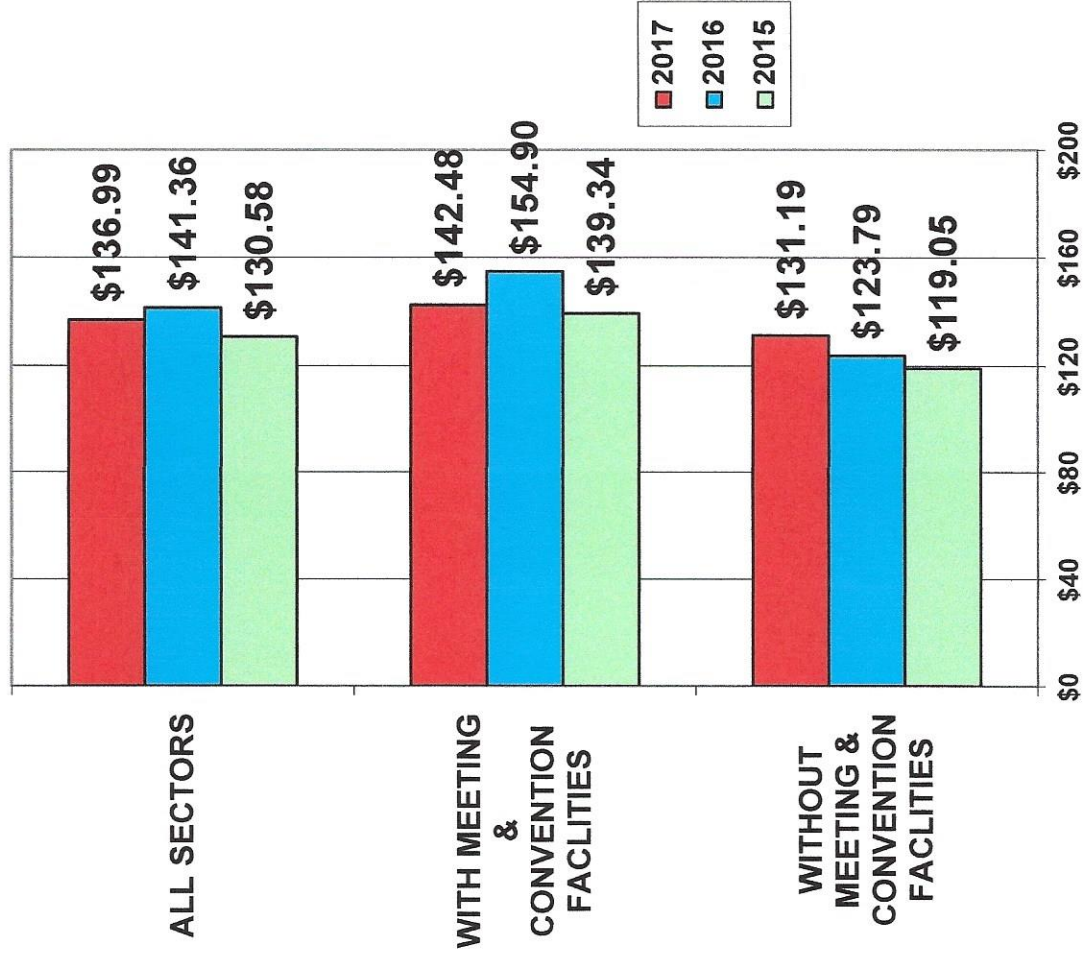
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PROPERTY SIZE -
JULY 2015 - 2017**



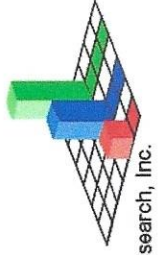
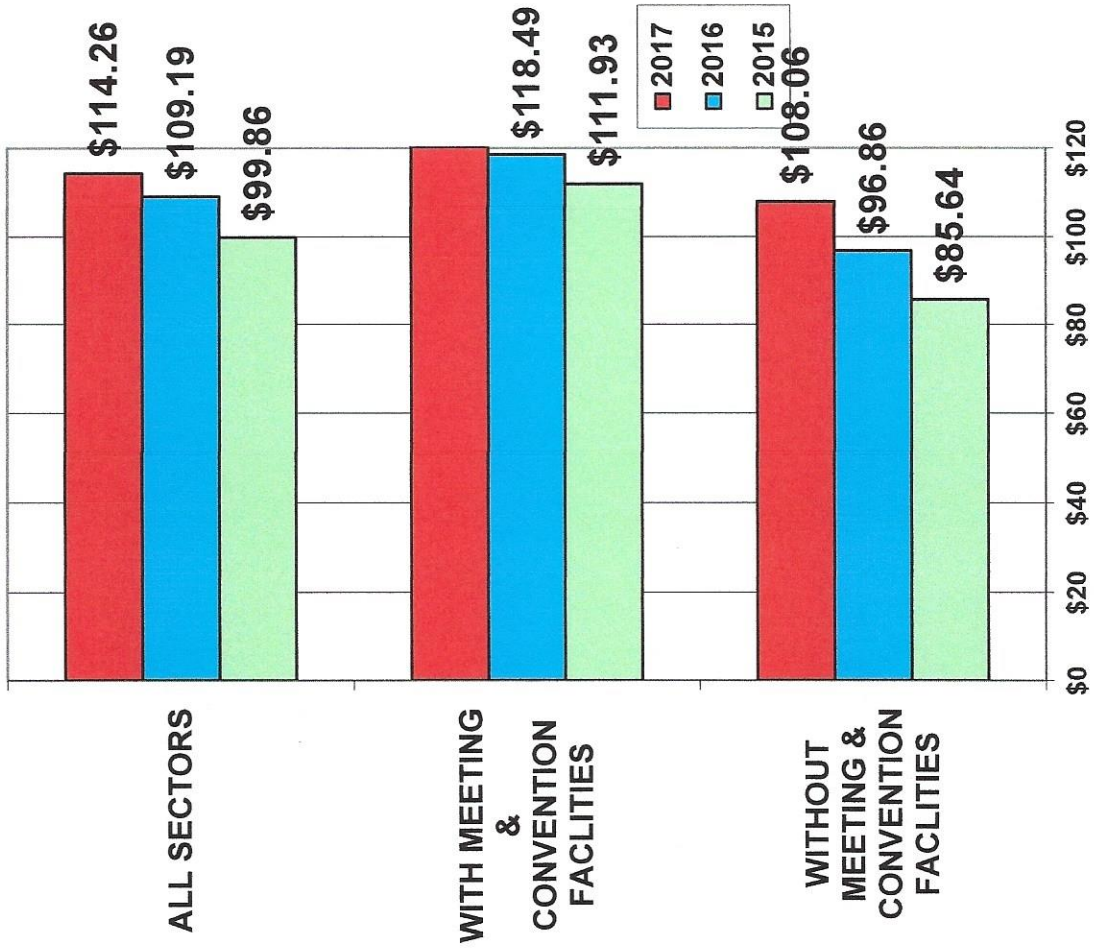
VOLUSIA OCCUPANCY BY MEETING & CONVENTION FACILITIES - JULY 2015 - 2017



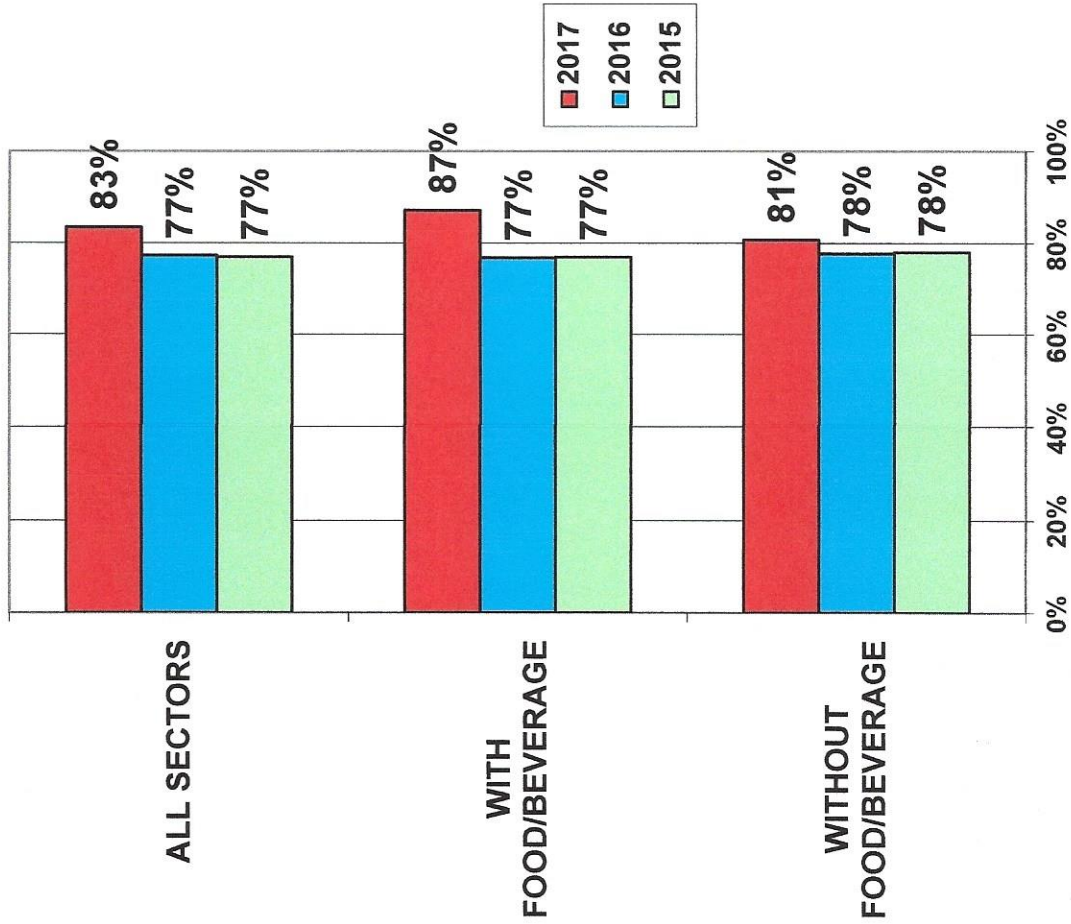
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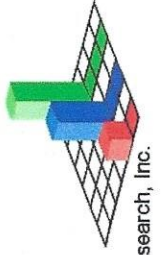
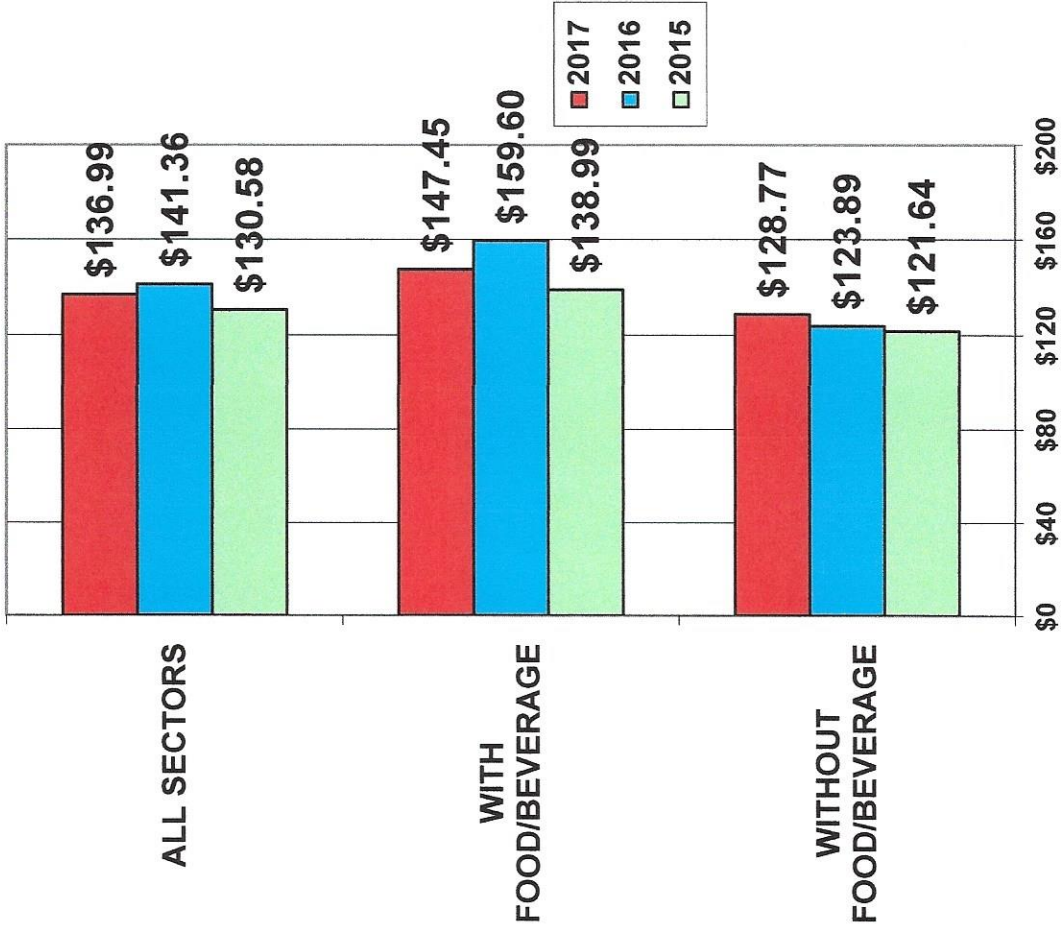
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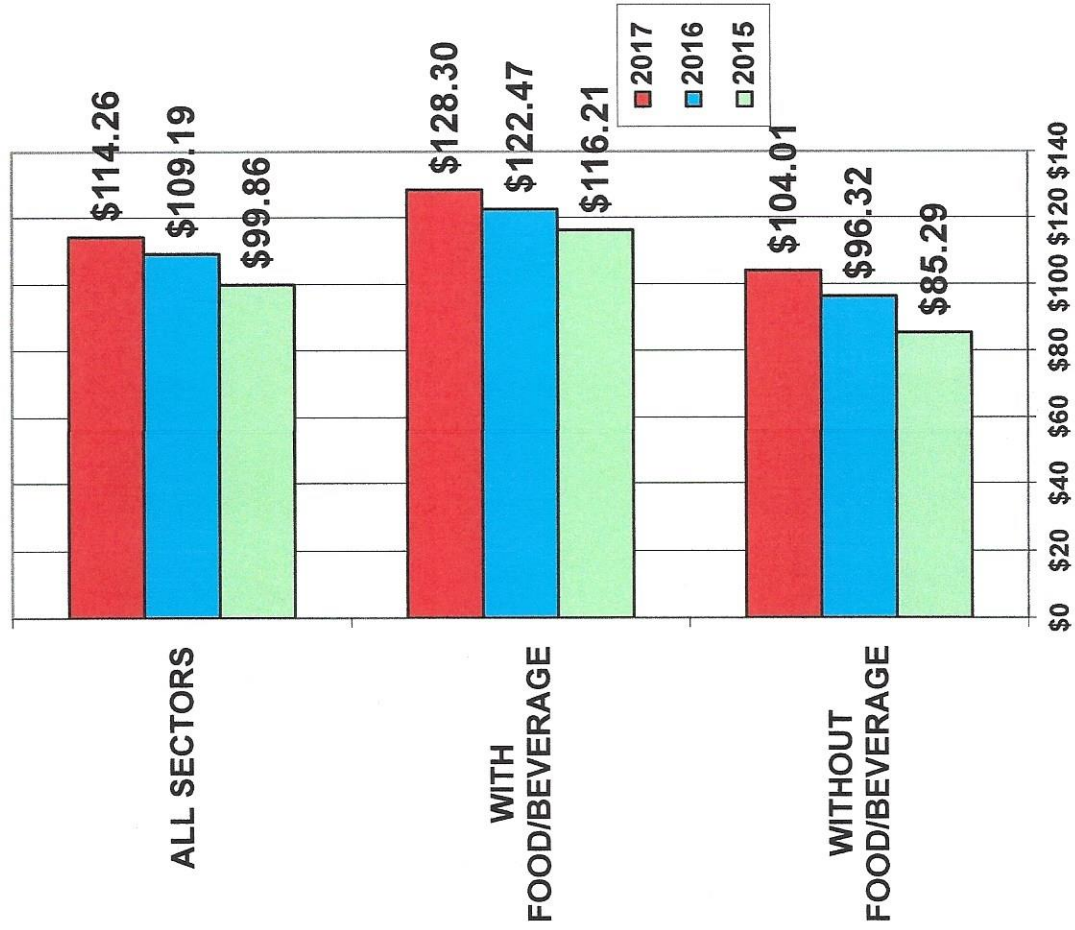
**VOLUSIA OCCUPANCY BY
FOOD/BEVERAGE -
JULY 2015 - 2017**



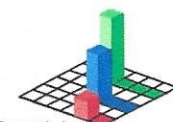
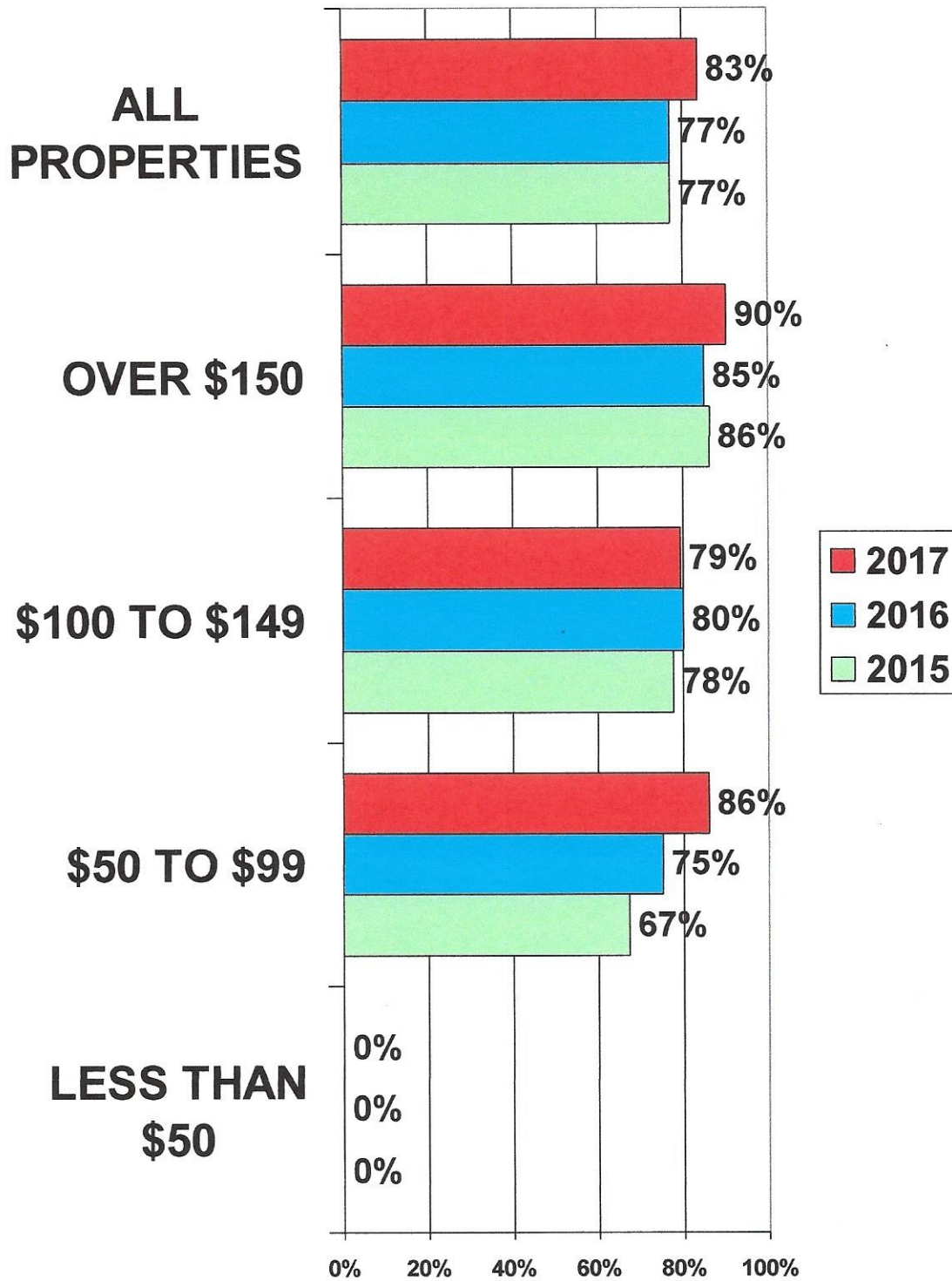
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FOOD/BEVERAGE
JULY 2015 - 2017**



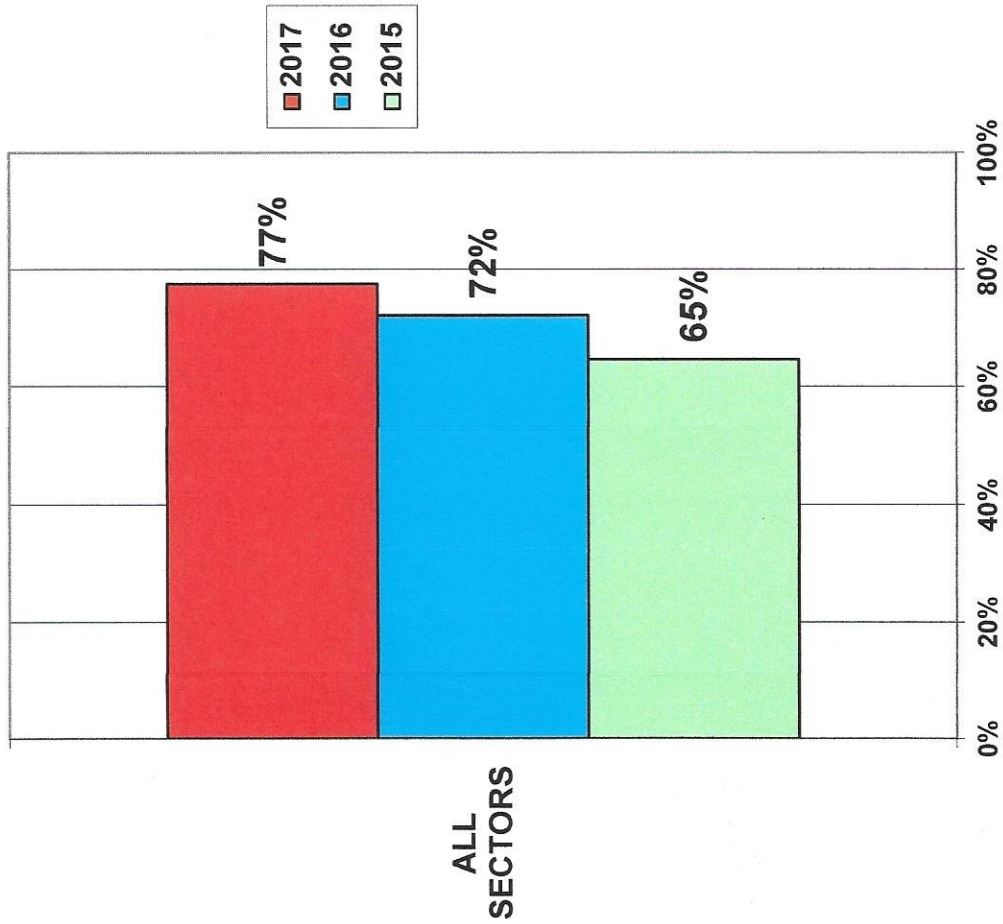
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JULY 2015 - 2017**



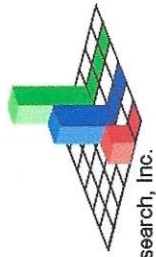
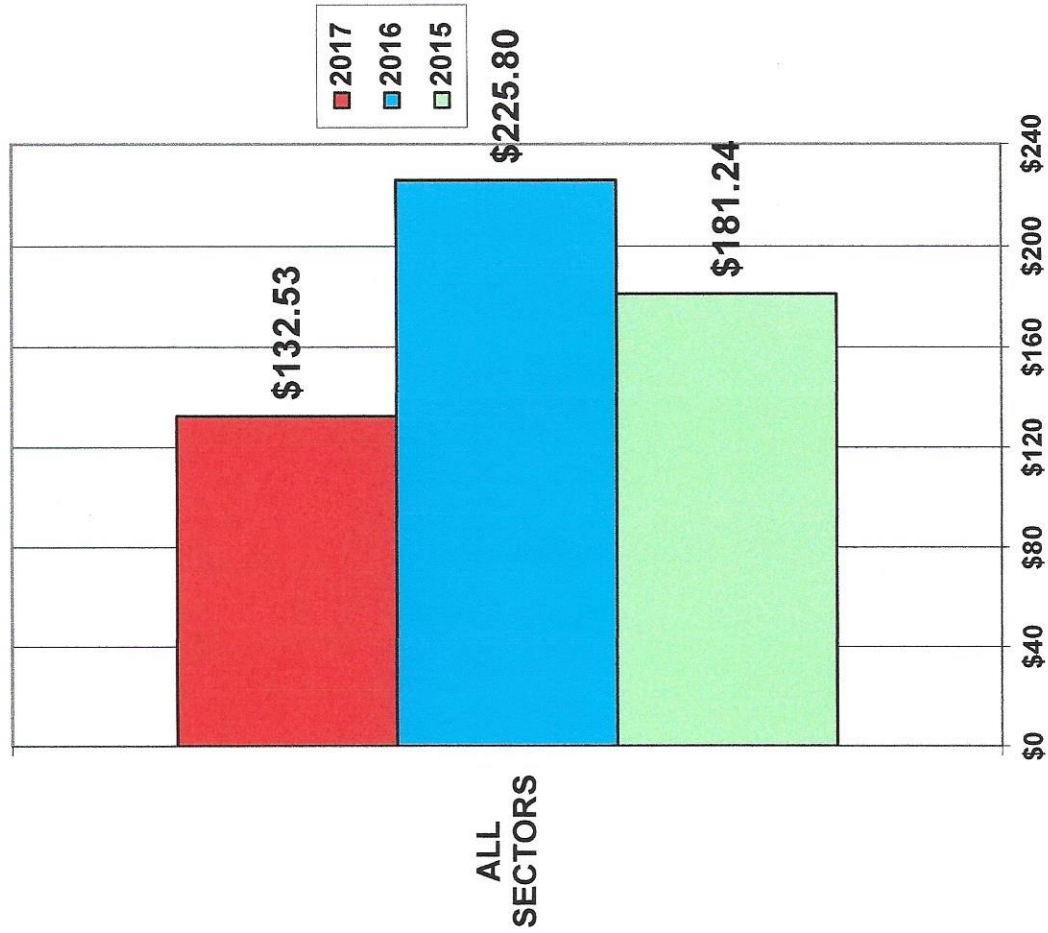
VOLUSIA HOTEL/MOTEL OCCUPANCY BY PRICE RANGE - JULY 2015 - 2017



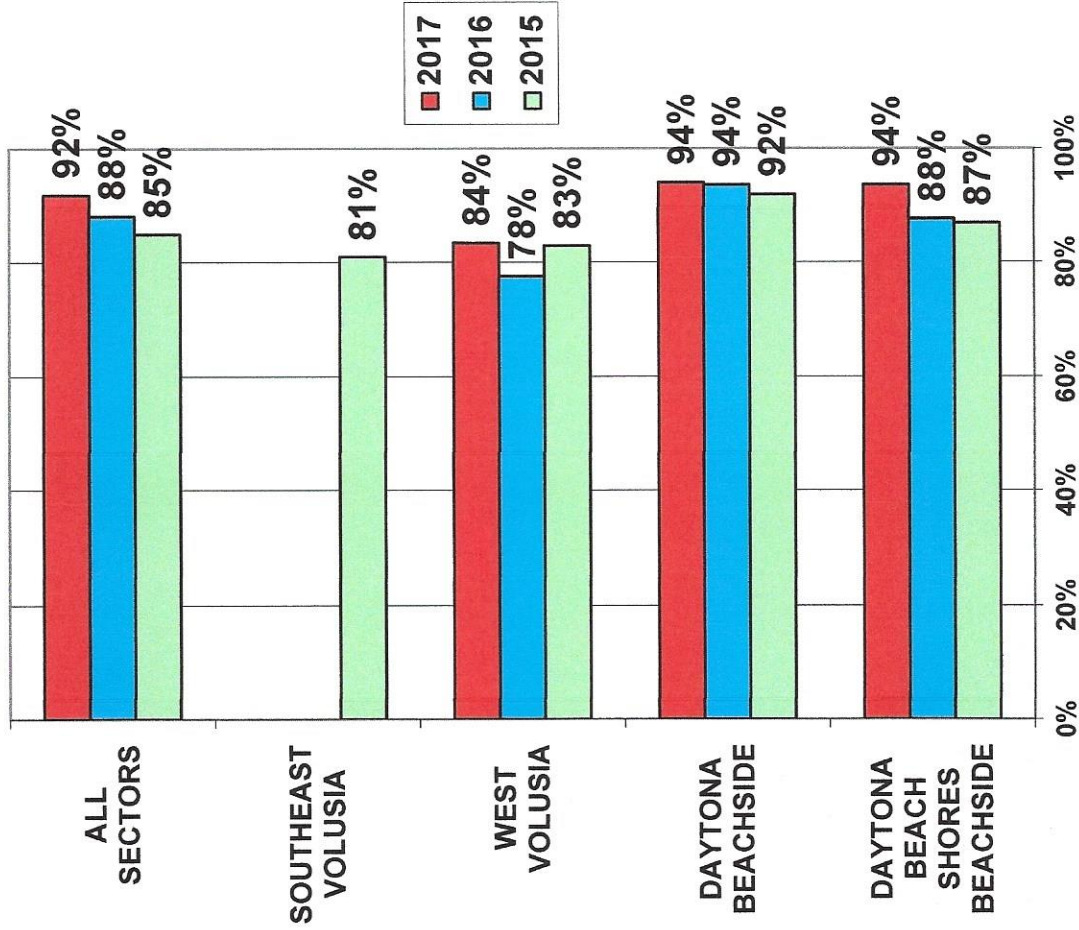
**VOLUSIA OCCUPANCY BY
CONDO/TIMESHARES -
JULY 2015 - 2017**



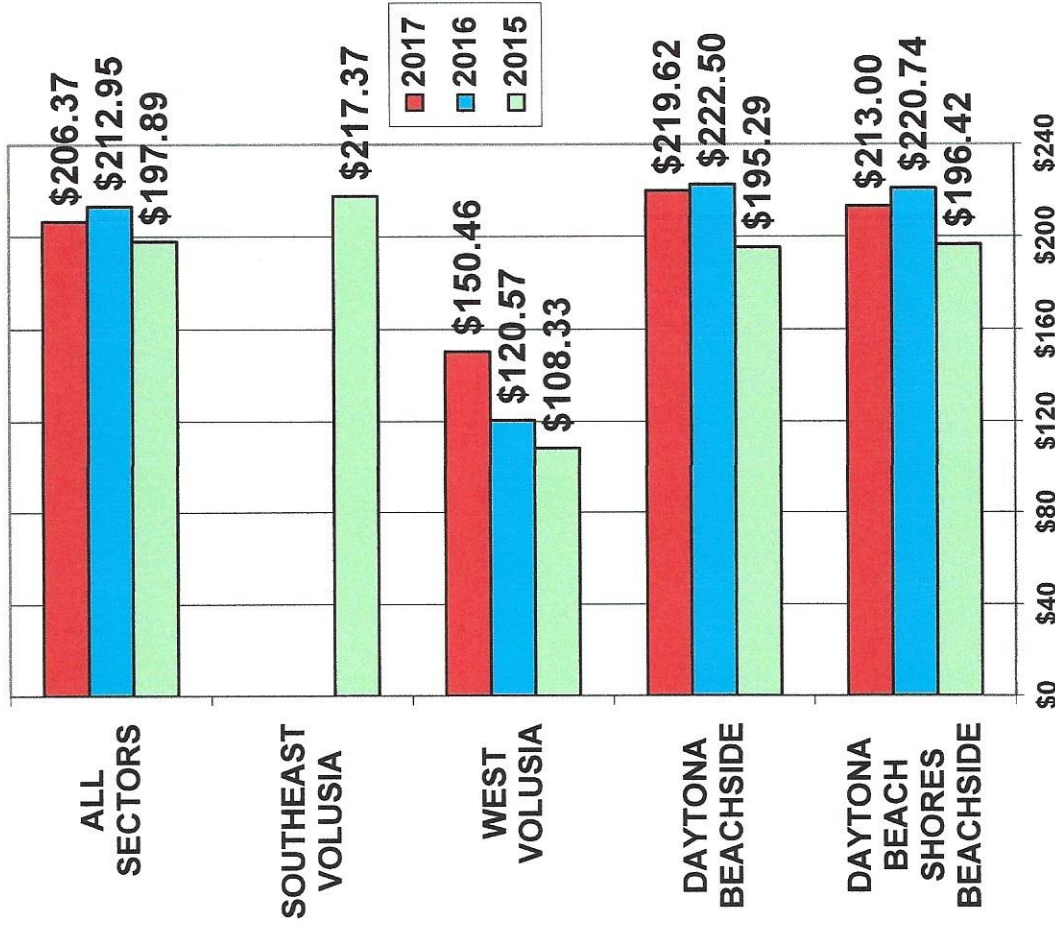
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CONDO/TIMESHARES -
JULY 2015 - 2017**



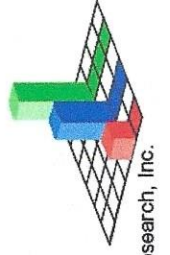
**VOLUSIA OCCUPANCY
BY AREA SECTORS -
JULY 4TH WEEKEND
2015 - 2017**



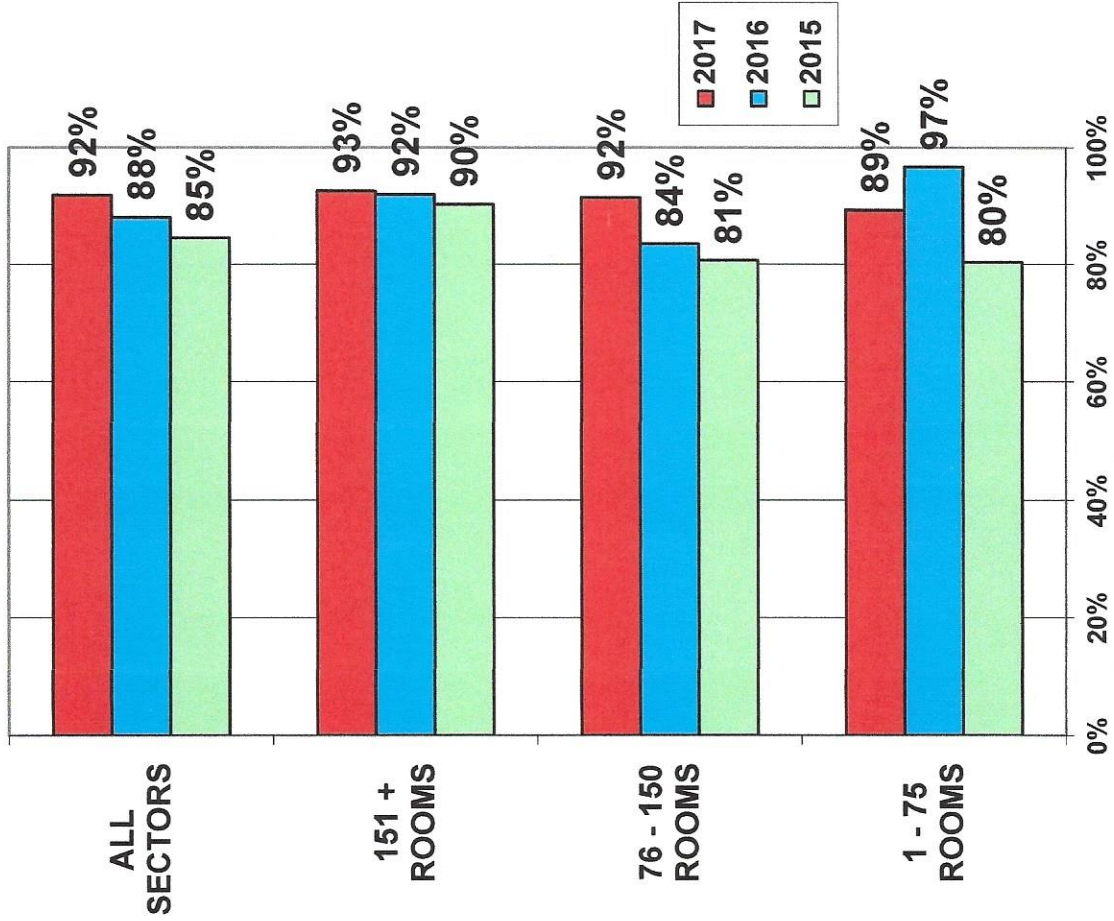
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AREA SECTORS -
JULY 4TH WEEKEND
2015 - 2017**



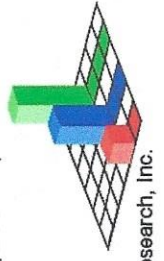
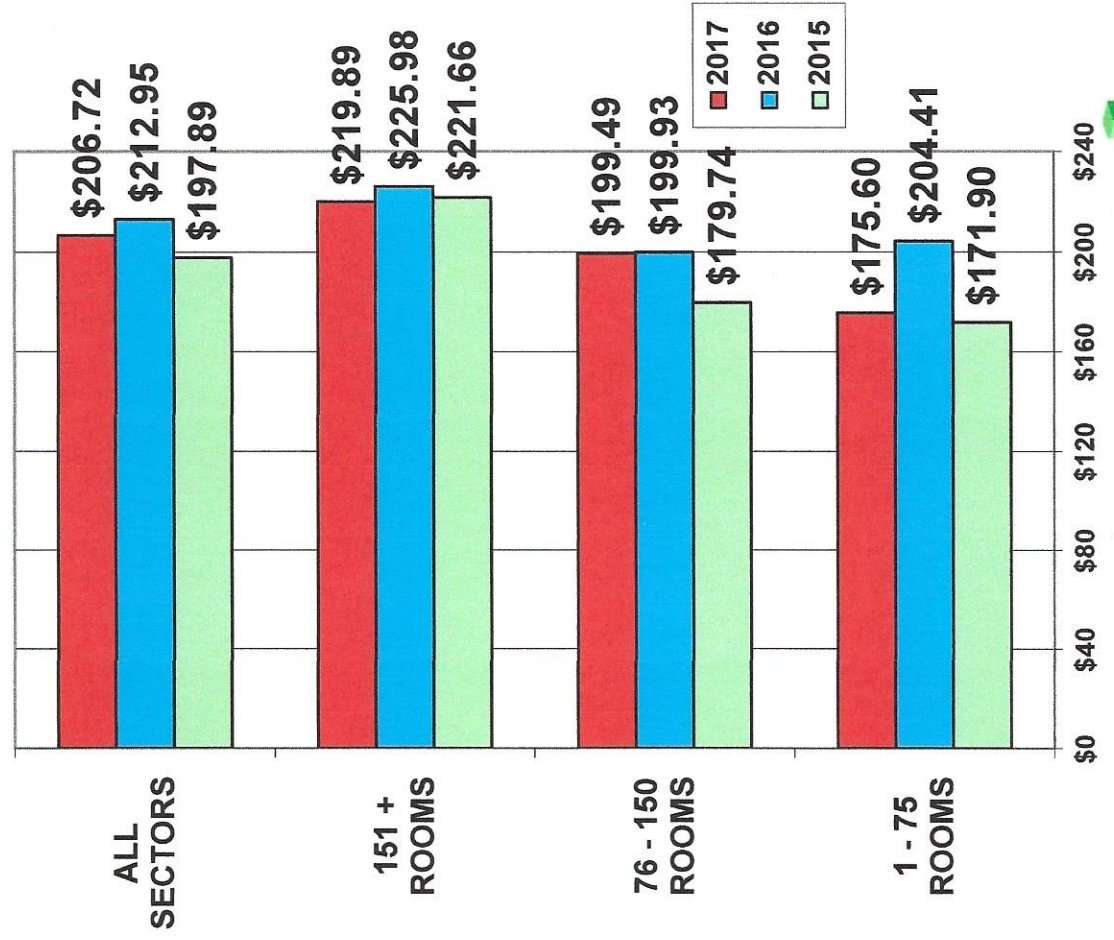
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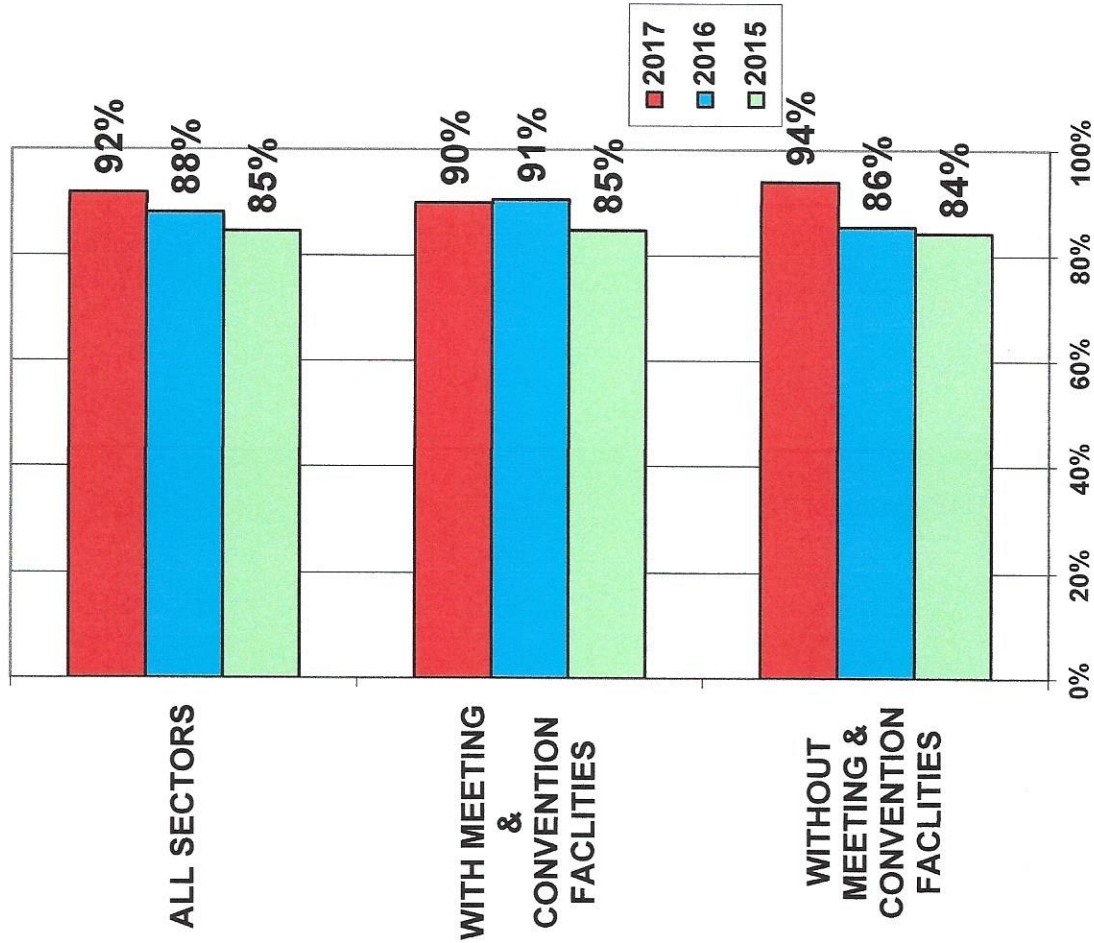
**VOLUSIA OCCUPANCY BY
PROPERTY SIZE - JULY 4TH WEEKEND
2015 - 2017**



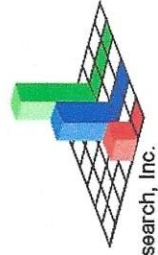
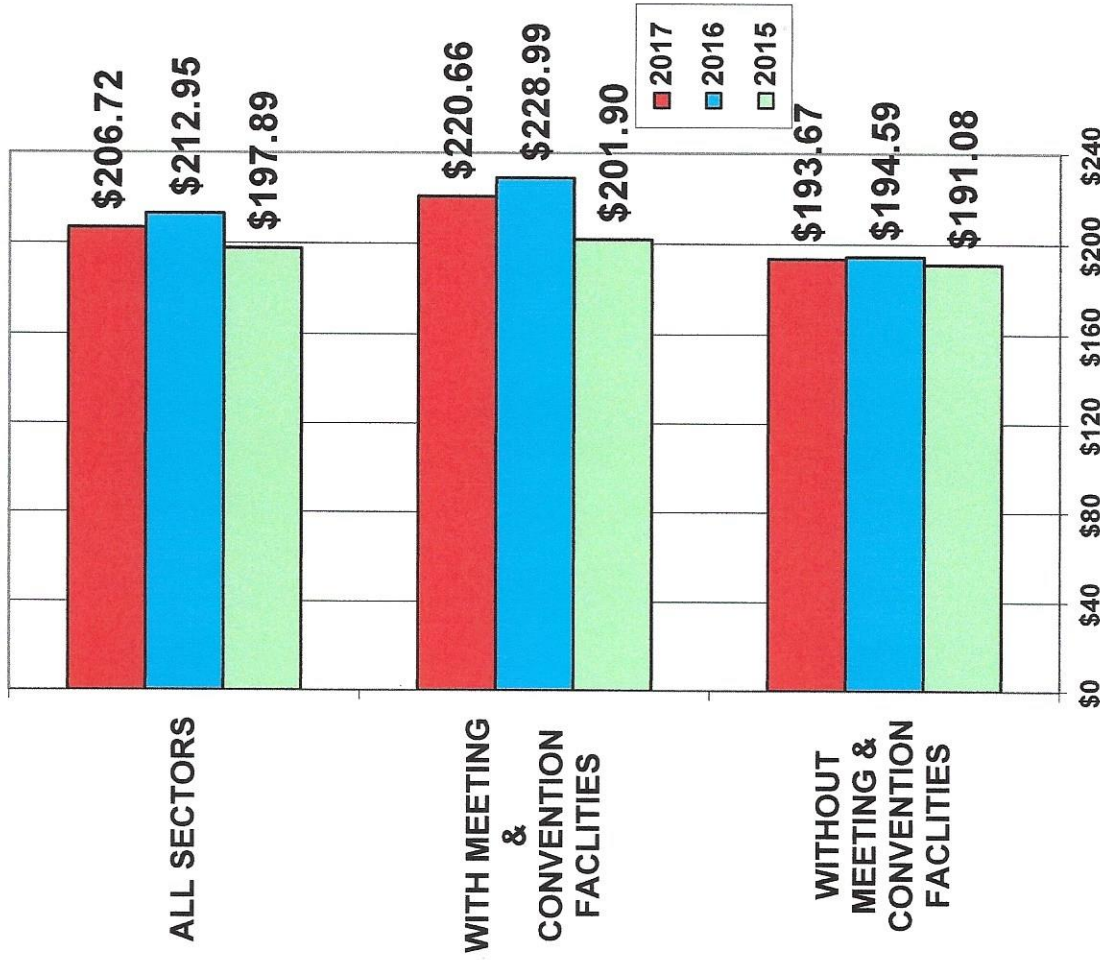
**VOLUSIA AVERAGE DAILY RATE BY
PROPERTY SIZE - JULY 4TH WEEKEND
2015 - 2017**



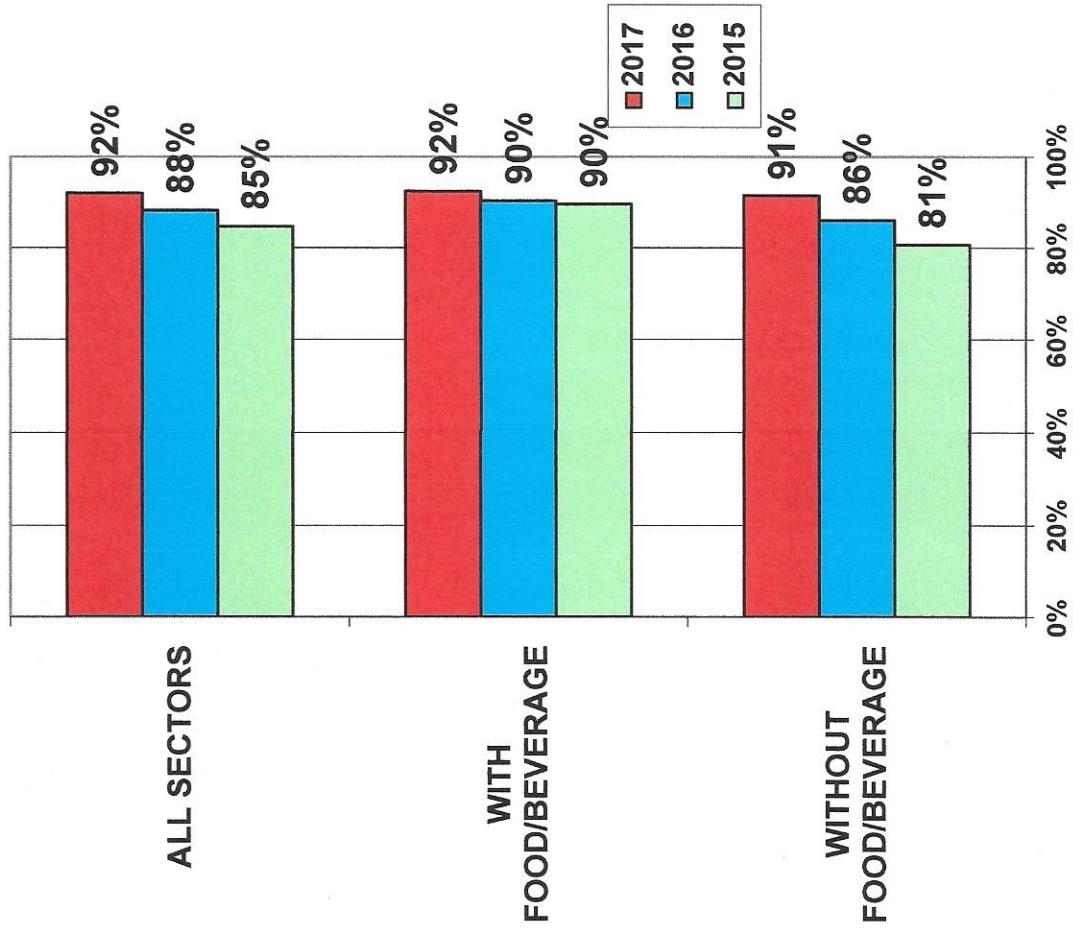
VOLUSIA OCCUPANCY BY MEETING & CONVENTION FACILITIES JULY 4TH WEEKEND 2015 - 2017



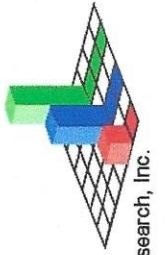
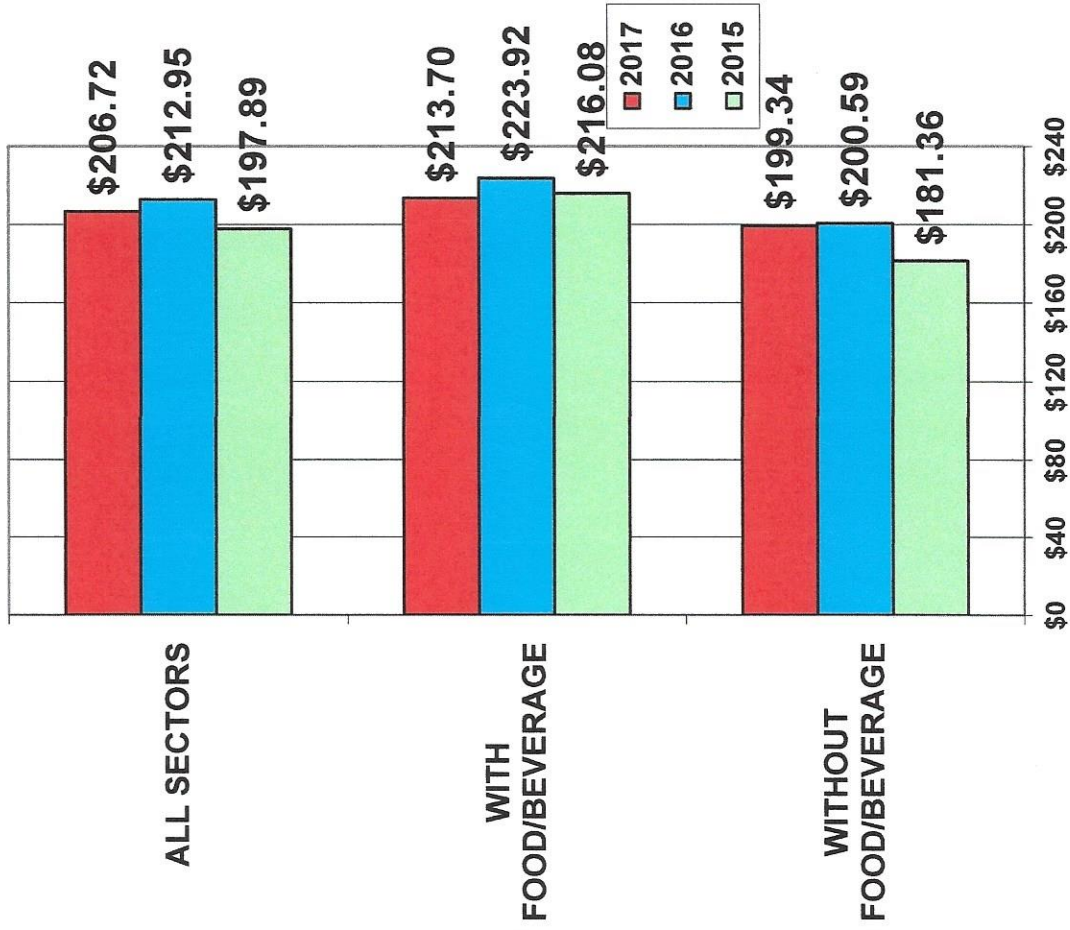
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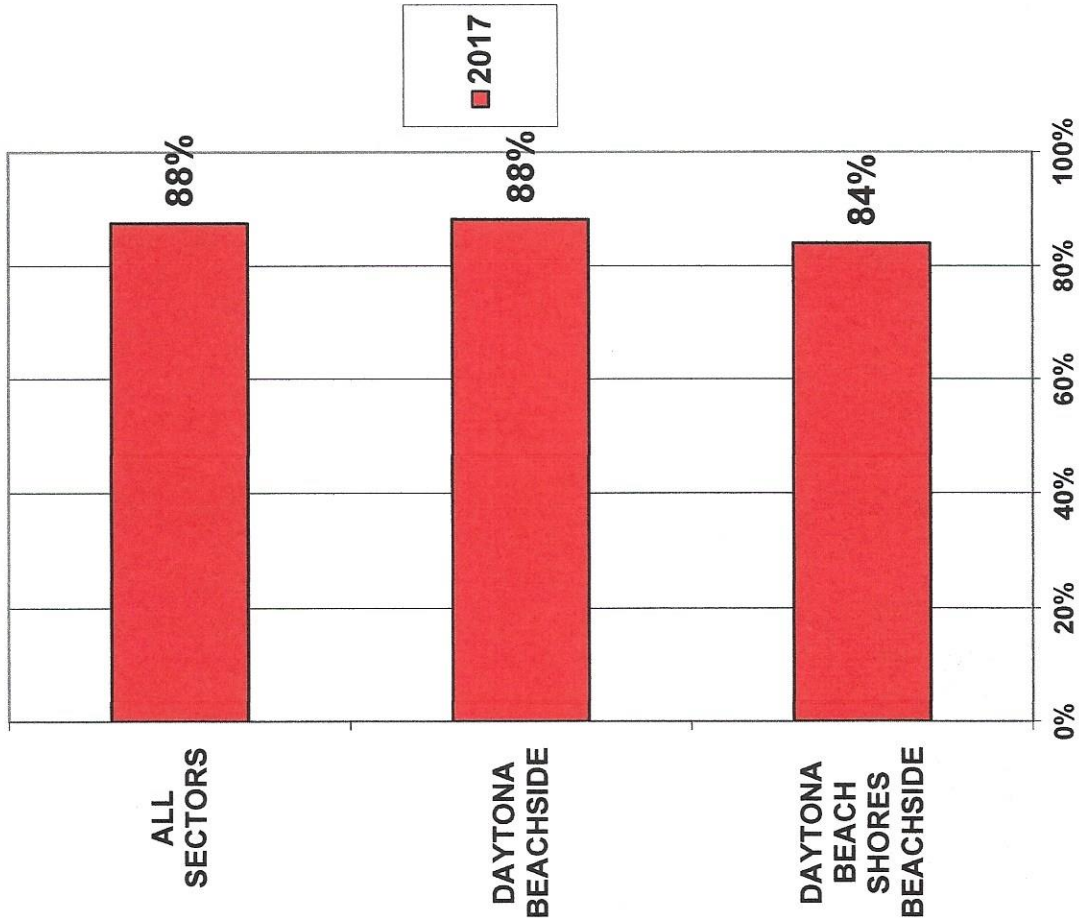
**VOLUSIA OCCUPANCY BY
FOOD/BEVERAGE -
JULY 4TH WEEKEND 2015 - 2017**



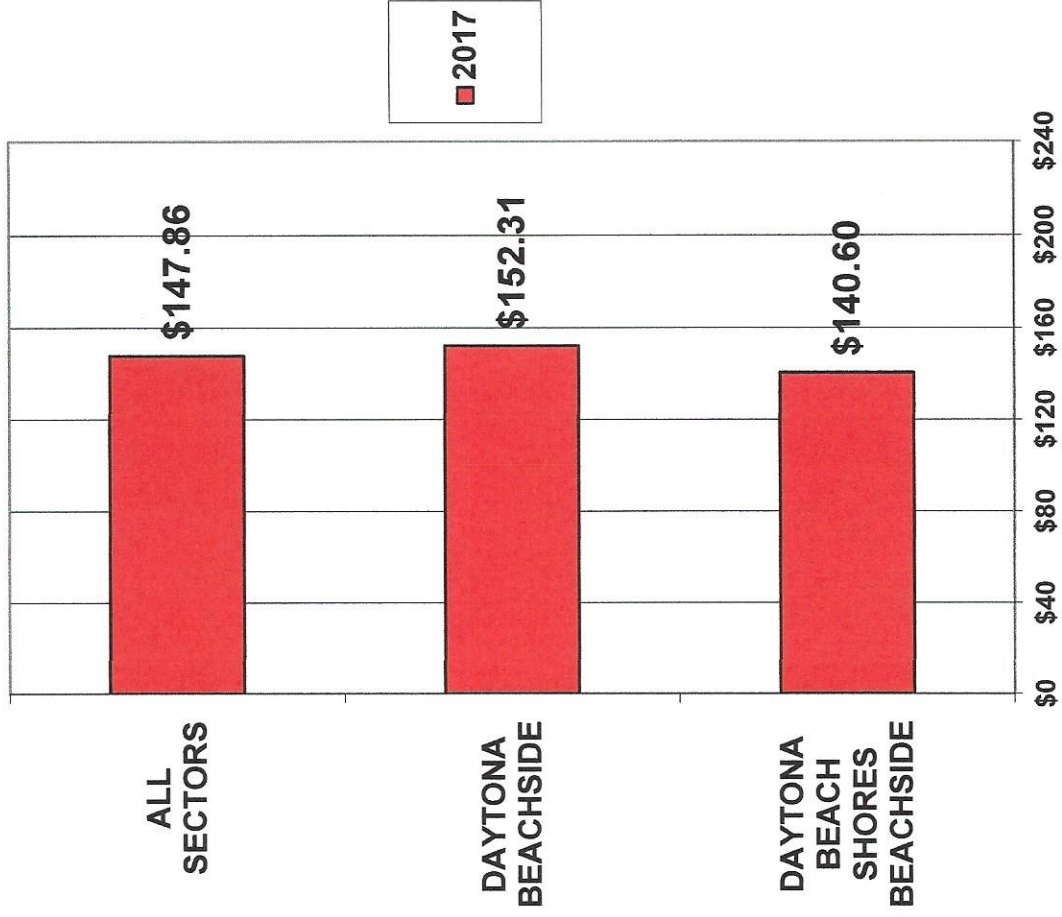
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FOOD/BEVERAGE
JULY 4TH WEEKEND 2015 - 2017**



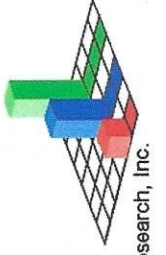
**VOLUSIA OCCUPANCY BY
AREA SECTORS -
SHRINER'S IMPERIAL SESSION
2017**



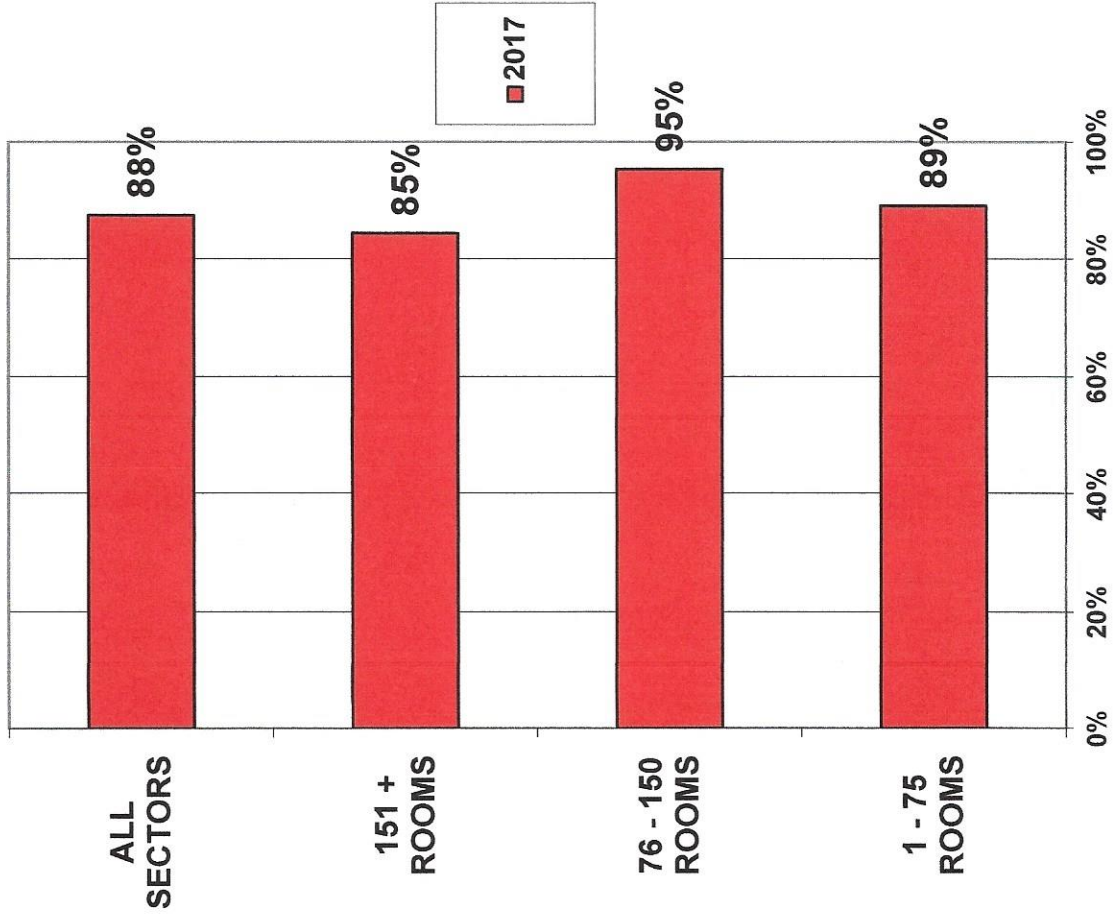
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SHRINER'S IMPERIAL SESSION
2017**



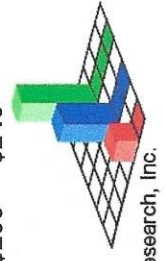
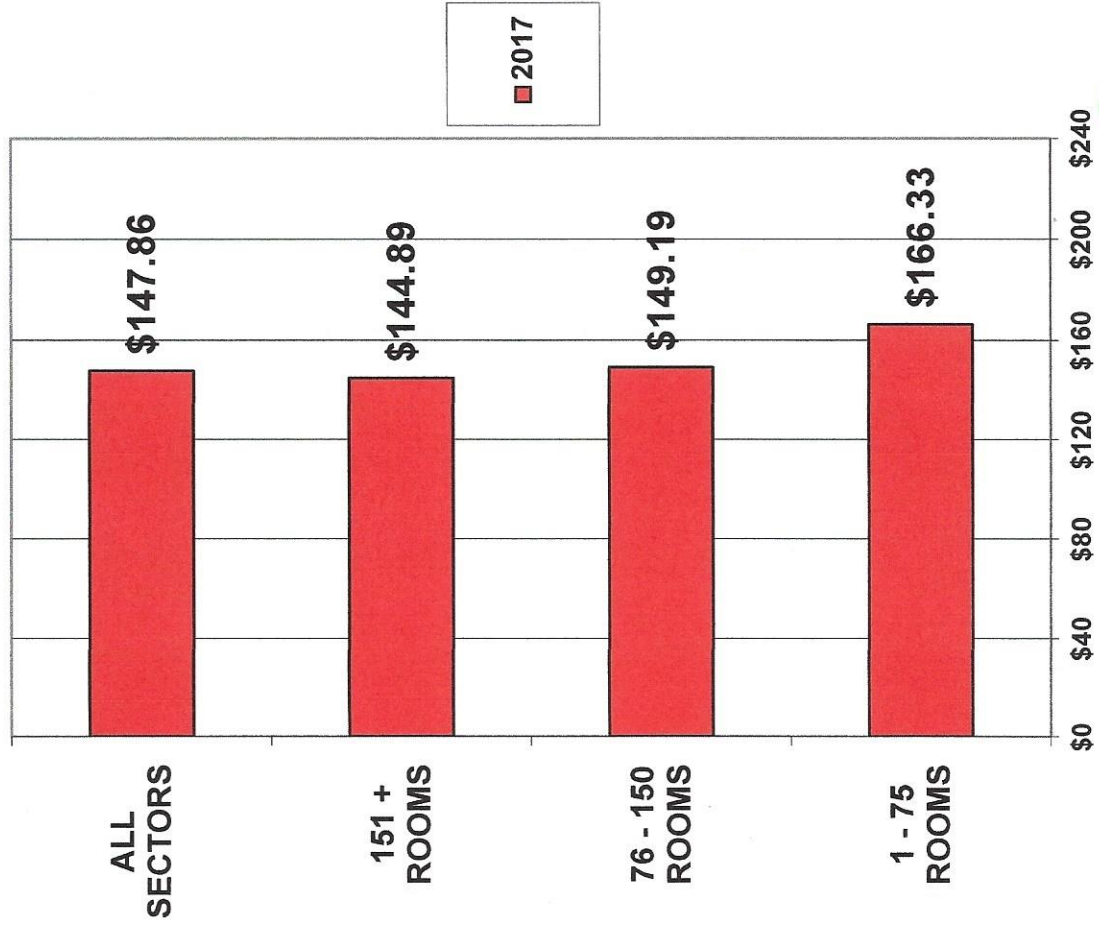
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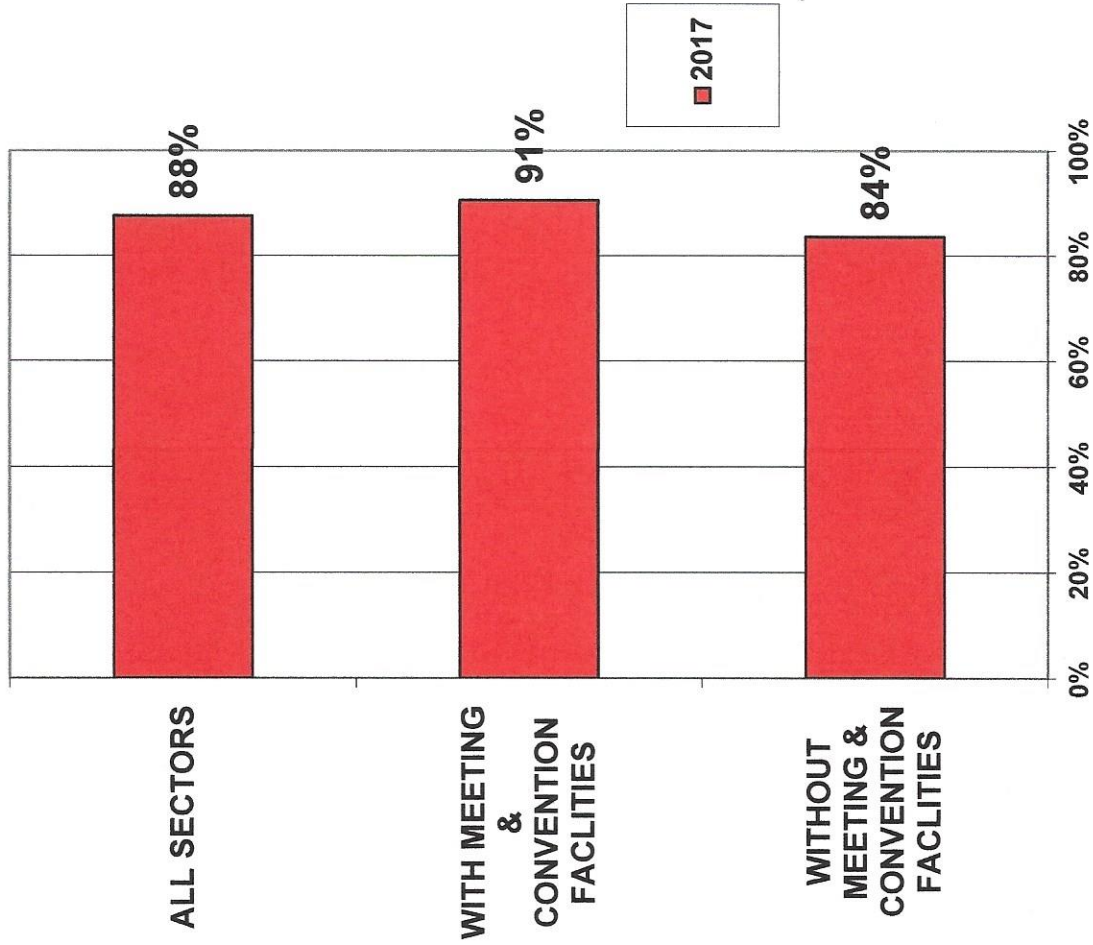
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PROPERTY SIZE -
SHRINER'S IMPERIAL SESSION
2017**



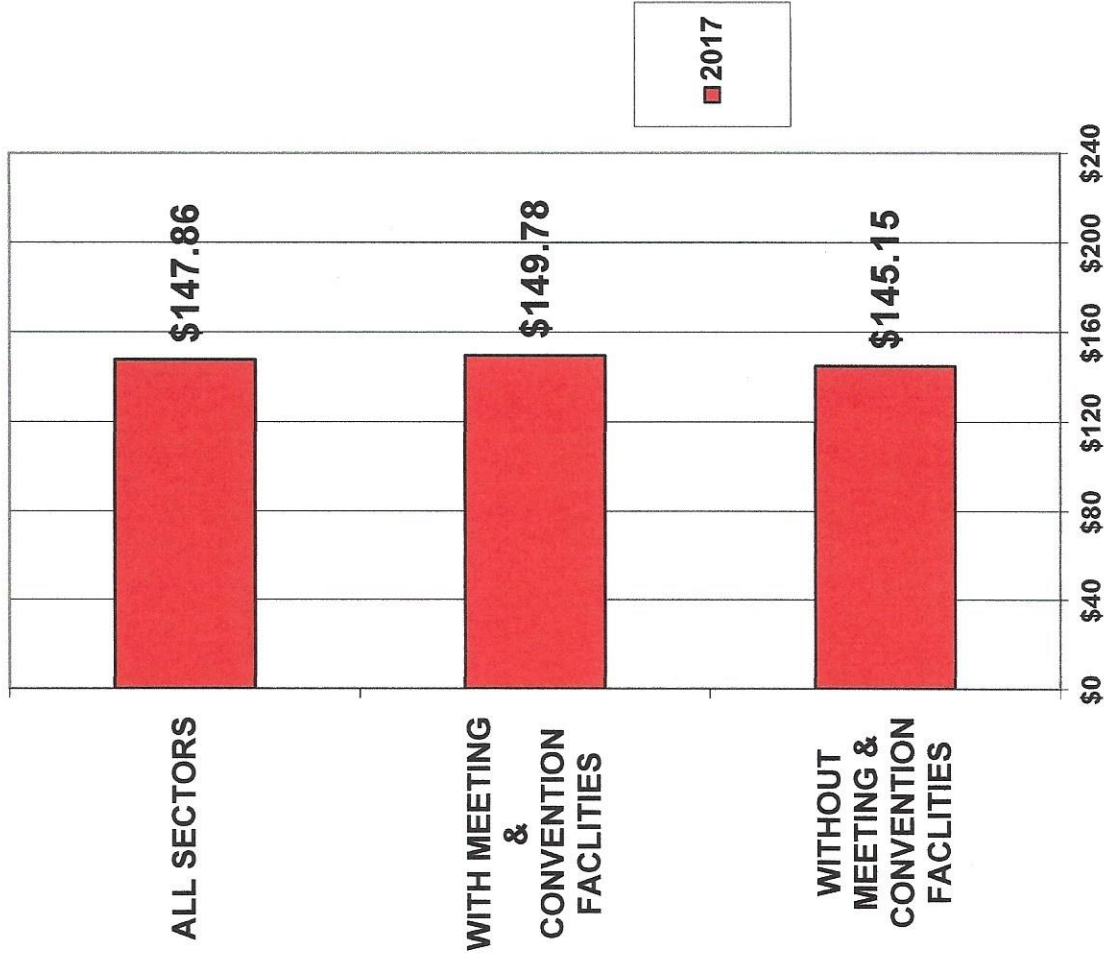
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PROPERTY SIZE -
SHRINER'S IMPERIAL SESSION
2017**



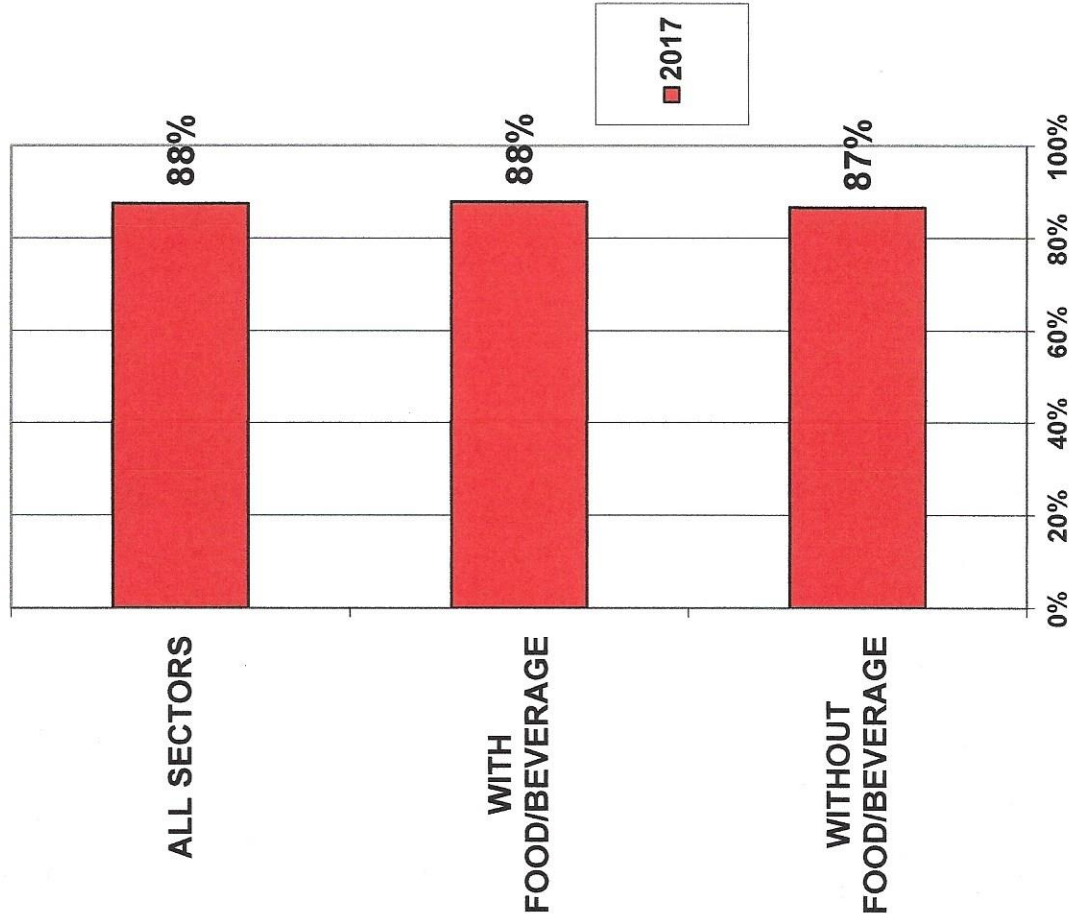
**VOLUSIA OCCUPANCY BY
MEETING & CONVENTION FACILITIES
SHRINER'S IMPERIAL SESSION
2017**



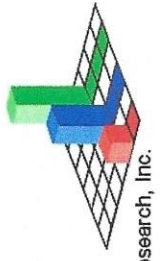
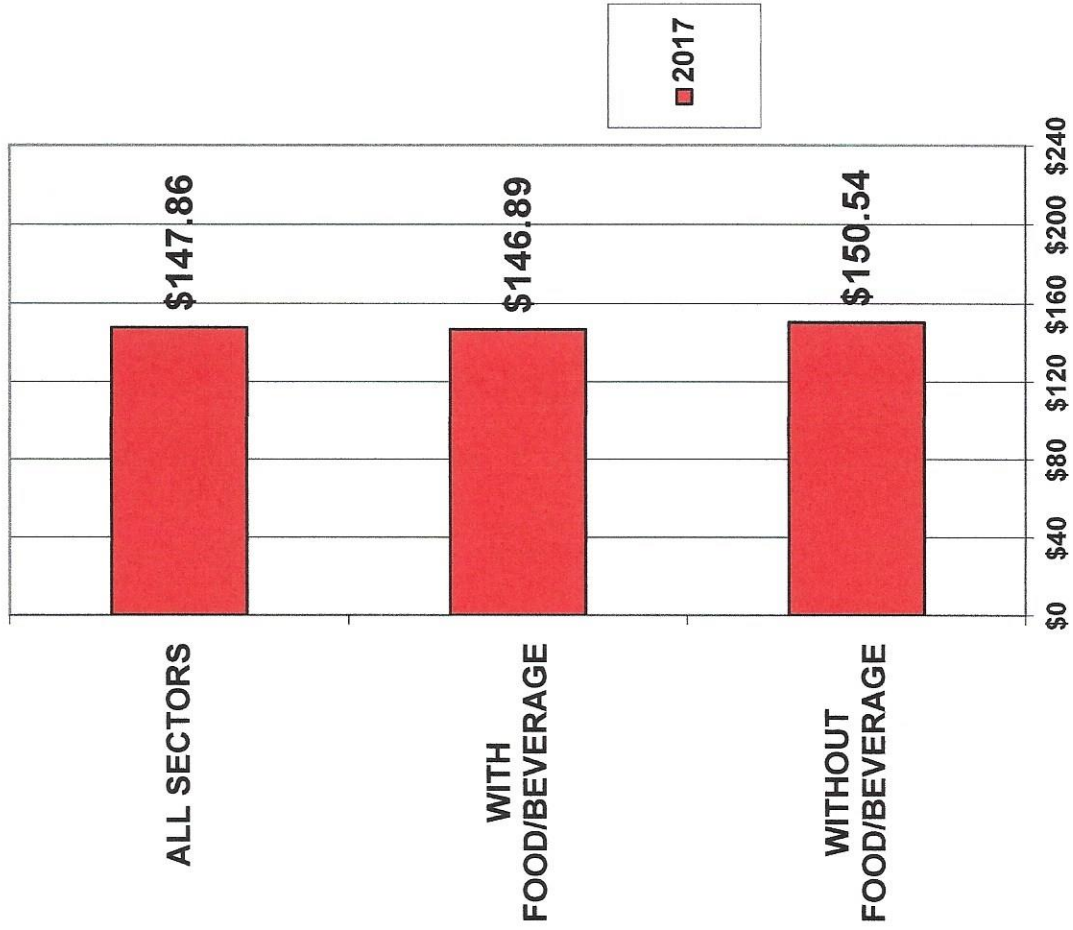
**VOLUSIA AVERAGE DAILY RATE BY
MEETING & CONVENTION FACILITIES -
SHRINER'S IMPERIAL SESSION
2017**



**VOLUSIA OCCUPANCY BY
FOOD/BEVERAGE -
SHRINER'S IMPERIAL SESSION
2017**



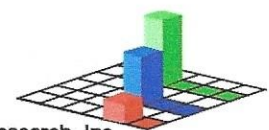
**VOLUSIA AVERAGE DAILY RATE BY
FOOD/BEVERAGE
SHRINER'S IMPERIAL SESSION
2017**



**PARTICIPATING PROPERTIES
BY AREA SECTOR**

MONTHS REPORTING 2017

	<u>RMS</u>	<u>JAN</u>	<u>FEB</u>	<u>MAR</u>	<u>APR</u>	<u>MAY</u>	<u>JUNE</u>	<u>JULY</u>	<u>AUG</u>	<u>SEPT</u>	<u>OCT</u>	<u>NOV</u>	<u>DEC</u>
DAYTONA BEACH SHORES BEACHSIDE													
ACAPULCO HOTEL & RESORT	133												CLOSED
BAHAMA HOUSE	95	X	X	X	X	X	X	X	X	X	X	X	X
BEST WESTERN PLUS AKU TIKI	132	X	X	X	X	X	X	X	X	X	X	X	X
EL CARIBE RESORT & CONF. CENTER	112	X	X	X	X	X	X	X	X	X	X	X	X
HAMPTON DAYTONA SHORES OCEANFRONT	111	X	X	X	X	X	X	X	X	X	X	X	X
HOLIDAY INN EXPRESS OCEANFRONT	100	--	--	X	X	X	X	X	X	X	X	X	X
HYATT PLACE	143	X	X	X	X	X	X	X	X	X	X	X	X
LEXINGTON INN & SUITES	101	X	X	X	X	X	X	X	X	X	X	X	X
OCEAN COURT MOTEL	33	X	X	X	X	X	X	X	X	X	X	X	X
OCEANSIDE INN	191	X	X	X	X	X	X	X	X	X	X	X	X
PERRY'S OCEAN EDGE RESORT	200	X	X	X	X	X	X	X	X	X	X	X	X
RESIDENCE INN DAYTONA BEACH OCEANFRONT	105			X	X	X	X	X	X	X	X	X	X
SHORES RESORT & SPA	212	X	X	X	X	X	X	X	X	X	X	X	X
SUN VIKING LODGE	91	X	X	X	X	X	X	X	X	X	X	X	X
DAYTONA BEACHSIDE													
BEST WESTERN DAYTONA INN	96	X	X	X	X	X	X	X	X	X	X	X	X
DAYTONA BEACH REGENCY	98	--	X	CLOSED		X	X	X	X	X	X	X	X
DAYTONA BEACH RESORT	303	X	X	X	X	X	X	X	X	X	X	X	X
DAYTONA INN BEACH RESORT	65		X	X	X	X	X	X	X	X	X	X	X
HILTON DAYTONA BEACH RESORT	742	X	X	X	X	X	X	X	X	X	X	X	X
HILTON GARDEN INN DAYTONA BEACH OCEANFRONT	144							X	X	X	X	X	X
HOLIDAY INN HOTEL ON THE OCEAN	123	X	X	X	X	X	X	X	X	X	X	X	X
HOLIDAY INN RESORT DAYTONA	188	X	X	X	X	X	X	X	X	X	X	X	X
LA PLAYA RESORT	238												CLOSED
NAUTILUS INN	90	X	X	X	X	X	X	X	X	X	X	X	X
OCEAN BREEZE CLUB HOTEL	206	X	X		X	X	X	X	X	X	X	X	X
PLAZA RESORT & SPA	322	X	X	X	X	X	X	X	X	X	X	X	X
SILVER BEACH CLUB	74	--	--	X	X	X	X	X	X	X	X	X	X
THE VILLA BED AND BREAKFAST	4	X	X		X	X							X
WYNDHAM OCEAN WALK	127	X	X	X	X	X	X	X	X	X	X	X	X



**PARTICIPATING PROPERTIES
BY AREA SECTOR**

MONTHS REPORTING 2017

	<u>RMS</u>	<u>JAN</u>	<u>FEB</u>	<u>MAR</u>	<u>APR</u>	<u>MAY</u>	<u>JUNE</u>	<u>JULY</u>	<u>AUG</u>	<u>SEPT</u>	<u>OCT</u>	<u>NOV</u>	<u>DEC</u>
ORMOND BEACHSIDE													
BEST WESTERN CASTILLO DEL SOL	147	X	X	X	X	X	X	X					
CORAL SANDS OCEAN FRONT	102	--	X		X	X	X	X					
COVE ON ORMOND BEACH	112	--	--	X	X	X	X	X					
HIGHWAY I-95 INTERSECTIONS													
BEST WESTERN SPEEDWAY	151	X	X	X	X	X	X	X					
*COUNTRY INN & SUITES PORT ORANGE	87	X	X	X	X	X	X	X					
HOWARD JOHNSON DESTINATION DAYTONA	79	X	X	X	X	X	X	X					
SLEEP INN	82	X	X	X	X	X	X	X					
AIRPORT/SPEEDWAY DISTRICT													
DAYTONA BEACH COURTYARD	122	X	X	X	X	X	X	X					
DAYTONA BEACH RESIDENCE INN	122	X	X	X	X	X	X	X					
HAMPTON INN AIRPORT	122	X	X	X	X	X	X	X					
HILTON GARDEN INN D B AIRPORT	115	X	X	X	X	X	X	X					
HOMEWOOD SUITES	94	X	X	X	X	X	X	X					
QUALITY INN DAYTONA	64	X	X	X	X	X	X	X					
WEST VOLUSIA													
ALLING HOUSE BED AND BREAKFAST ORANGE CITY	8	X	X	X	X	X	X	X					
ARTISAN DOWNTOWN	8	X	X	X	X	X	X	X					
COMFORT INN DELAND	68	X	X	X	X	X	X	X					
DAYS INN ORANGE CITY	37	X	X			X		X					
HAMPTON INN DEBARY	76	X	X	X	X	X	X	X					
HAMPTON INN DELAND	94	X	X	X	X	X	X	X					
HOLIDAY IN EXPRESS ORANGE CITY	114				X	X	X	X					
HONTOON LANDING	18	X	X	X	X	X	X	X					
SE VOLUSIA													
BEST WESTERN HOTEL	101	X	X	X	X	X	X	X					
COASTAL WATERS INN	40	X	X	X	X	X	X	X					
*COUNTRY INN & SUITES PORT ORANGE	87	X	X	X	X	X	X	X					
HAMPTON INN	122	X	X	X	X	X	X	X					
INN ON THE AVENUE	6	X	X	X		X	X						
OCEAN TRILLIUM SUITES	32	X	X	X	X	X	X	X					

*Country Inn & Suites is listed in Area Sectors Highway I-95 Intersections and SE Volusia

