

Memo

To: HAAA
From: Evelyn Fine
Date: January 25, 2018
Subject: December 2017 Occupancy & Average Daily Rate Report

Overall Daytona Beach Area Occupancy decreased about 7%, to 53% in December 2017 from 57% in December 2016.

The Daytona Beach Area Average Daily Rate decreased about 8%, to \$ 97.14 in December 2017 from \$ 105.55 in December 2016.

The Daytona Beach Area Revenue per Available Room decreased about 14%, to \$ 51.25 in December 2017 from \$ 59.67 in December 2016.

December was cooler than usual. Also mentioned was the separation by Trip Advisor of the Daytona Beach Shores Area lodging from the Daytona Beach Area, making it difficult to find hotel rooms unless specifically searching for DB Shores.

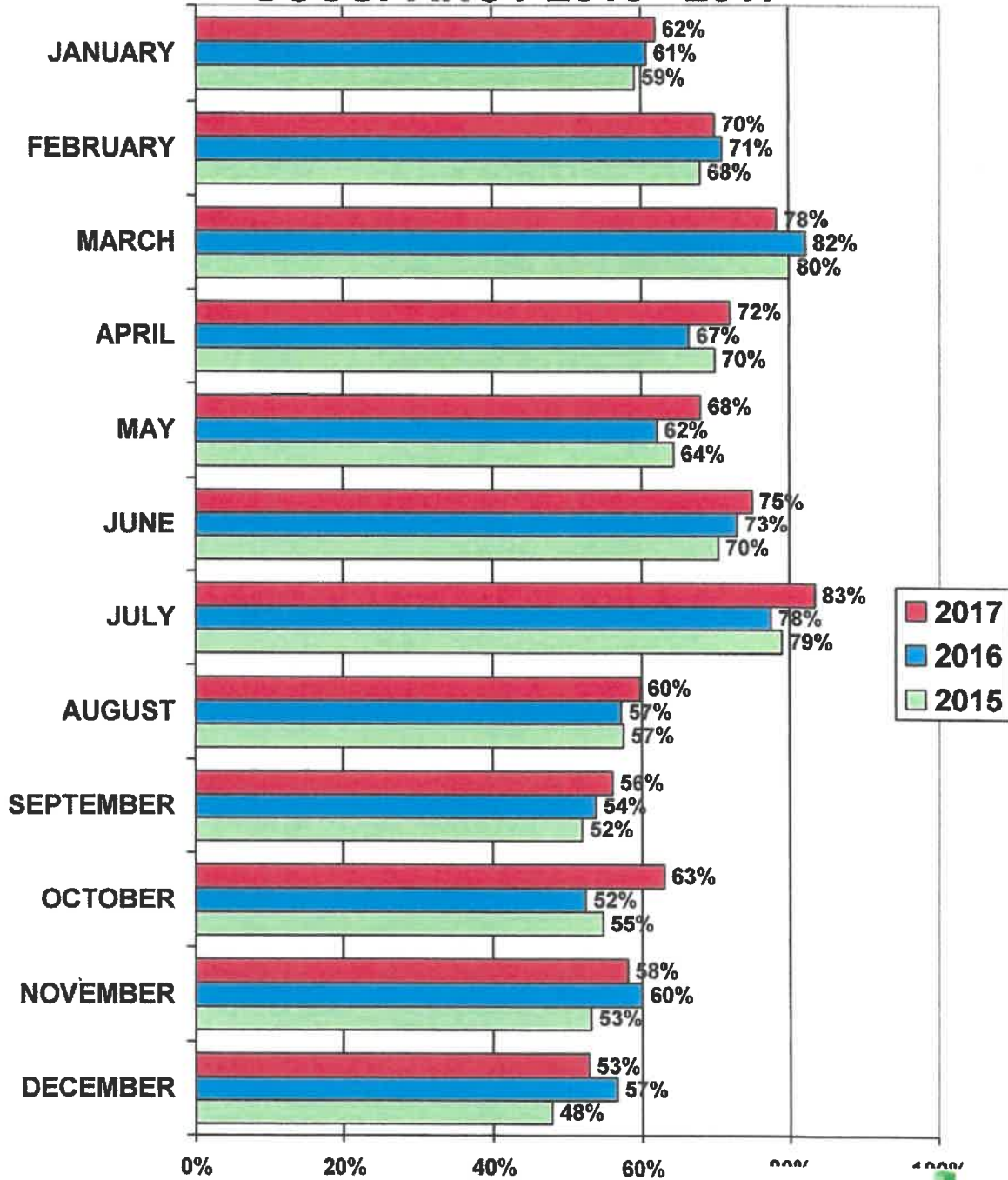
December 2016 had two events at the Ocean Center which had an impact of several thousand room nights. These events do not take place every year. In addition December 2016 saw the very well attended Ferrari Challenge. Also, fewer hotel rooms as a result of Hurricane Matthew resulted in higher occupancy and average daily rates for the available hotels.

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	Jun	Jul	Aug	Sep	Oct	Nov	Dec	2015	2016	2017
This Year	61%	71%	82%	87%	62%	73%	78%	57%	54%	52%	57%	57%	62%	70%	76%	72%	66%	75%	83%	60%	56%	56%	53%	53%	63%	\$122.22	\$127.97
Last Year	59%	68%	80%	70%	64%	70%	79%	57%	52%	54%	49%	48%	61%	71%	82%	67%	62%	73%	79%	57%	54%	52%	60%	57%	62%	\$121.93	\$122.22
Percent Change	3%	4%	3%	5%	-4%	4%	0%	4%	4%	-4%	13%	19%	2%	-1%	-5%	8%	9%	3%	8%	5%	5%	-3%	-7%	2%	0%	5%	
ADR																											
This Year	\$109.44	\$148.73	\$148.61	\$116.23	\$115.81	\$121.90	\$145.68	\$106.48	\$93.37	\$112.98	\$104.08	\$105.55	\$116.51	\$163.51	\$158.46	\$123.82	\$119.04	\$128.45	\$139.42	\$110.37	\$106.22	\$105.22	\$107.98	\$97.14	\$114.82	\$122.22	\$127.97
Last Year	\$101.13	\$147.07	\$143.85	\$117.30	\$107.58	\$111.55	\$131.88	\$101.59	\$92.93	\$103.80	\$98.66	\$98.78	\$109.44	\$148.73	\$148.81	\$116.23	\$115.81	\$111.55	\$146.68	\$106.48	\$93.37	\$93.37	\$104.08	\$105.55	\$12.32	0%	\$122.22
Percent Change	8%	0%	3%	-1%	8%	9%	11%	5%	0%	9%	8%	19%	6%	10%	5%	7%	3%	5%	-8%	4%	4%	4%	4%	-8%	2%	0%	5%
RevPAR																											
This Year	\$68.52	\$104.77	\$122.29	\$77.30	\$71.98	\$88.93	\$113.68	\$60.86	\$50.18	\$59.14	\$62.12	\$59.67	\$72.19	\$114.44	\$122.67	\$89.17	\$72.52	\$96.44	\$116.28	\$65.95	\$59.83	\$59.83	\$62.64	\$51.25	\$72.14	\$78.63	\$82.45
Last Year	\$59.82	\$100.18	\$114.52	\$81.94	\$69.89	\$76.55	\$103.06	\$57.72	\$48.21	\$56.74	\$42.04	\$42.04	\$66.52	\$104.77	\$122.29	\$77.30	\$71.98	\$78.55	\$113.68	\$60.86	\$59.14	\$59.14	\$62.12	\$59.67	\$66.36	\$72.14	\$79.63
Percent Change	11%	4%	7%	-6%	4%	13%	10%	5%	4%	4%	21%	42%	8%	9%	0%	15%	1%	8%	2%	8%	8%	8%	1%	-14%	6%	10%	4%
Supply																											
This Year	163,214	154,009	172,265	166,700	172,276	165,772	155,016	159,773	151,416	134,033	125,375	127,107	137,718	138,610	151,075	147,446	171,349	162,966	168,781	167,218	140,950	175,925	149,018	146,515	1,969,996	1,846,975	1,811,268
Last Year	167,706	155,707	170,481	167,687	170,041	167,883	173,672	169,784	159,045	172,169	146,622	169,969	167,706	155,707	170,481	167,687	172,276	165,772	155,015	159,773	151,416	134,033	125,375	127,107	1,807,600	1,999,996	1,846,975
Percent Change	-3%	-1%	1%	-1%	1%	-1%	-11%	-6%	-3%	-22%	-14%	-25%	-18%	-11%	-11%	-12%	-1%	-2%	8%	5%	-7%	30%	14%	17%	10%	-7%	-2%

DAYTONA BEACH HOTEL/MOTEL OCCUPANCY 2015 - 2017

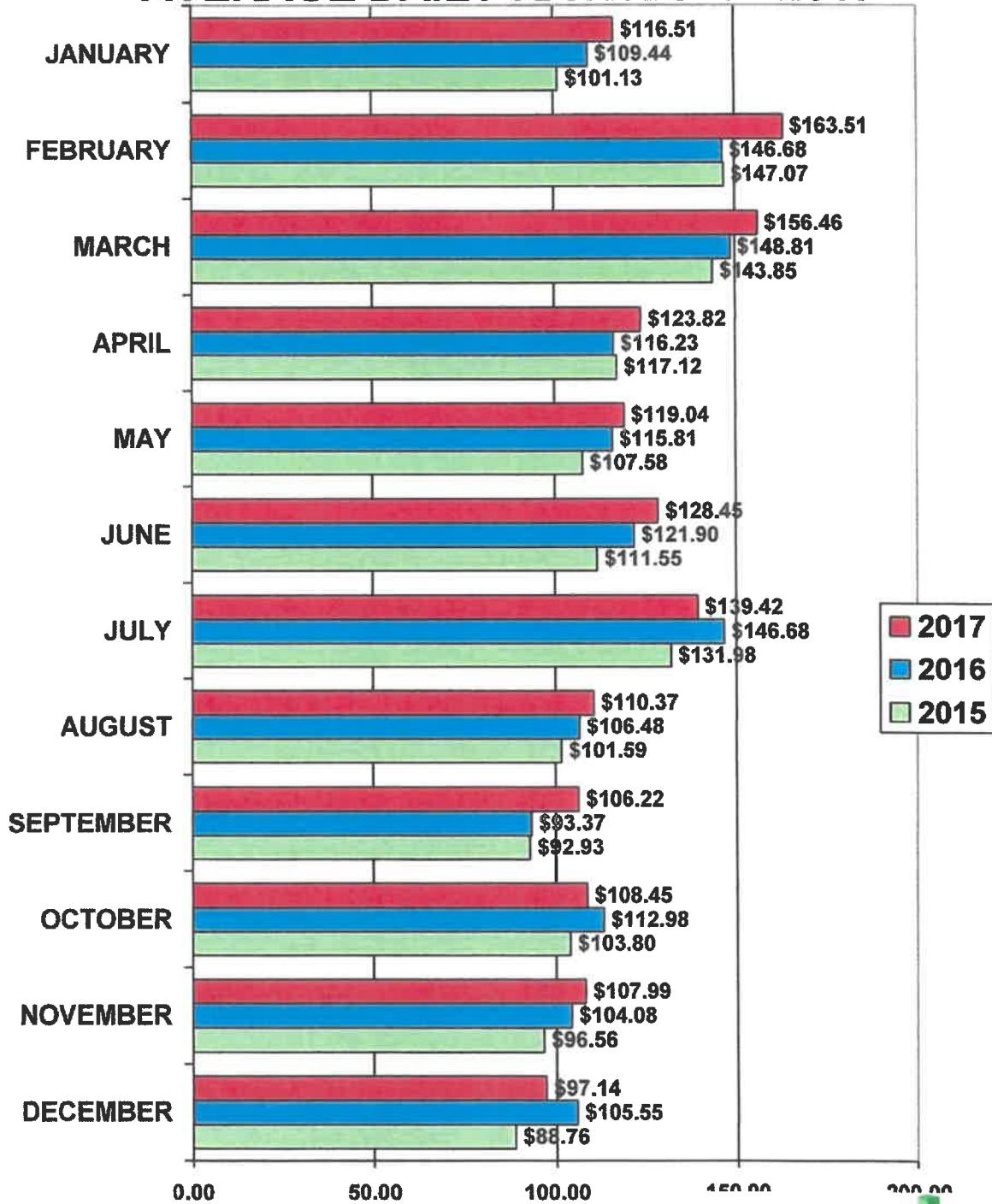


2017 YTD AVG. 67%
2016 YTD AVG. 65%
2015 YTD AVG. 62%

DECEMBER 2017 HIGH 90%
DECEMBER 2017 LOW 22%

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DAYTONA BEACH HOTEL/MOTEL AVERAGE DAILY RATE 2015 - 2017

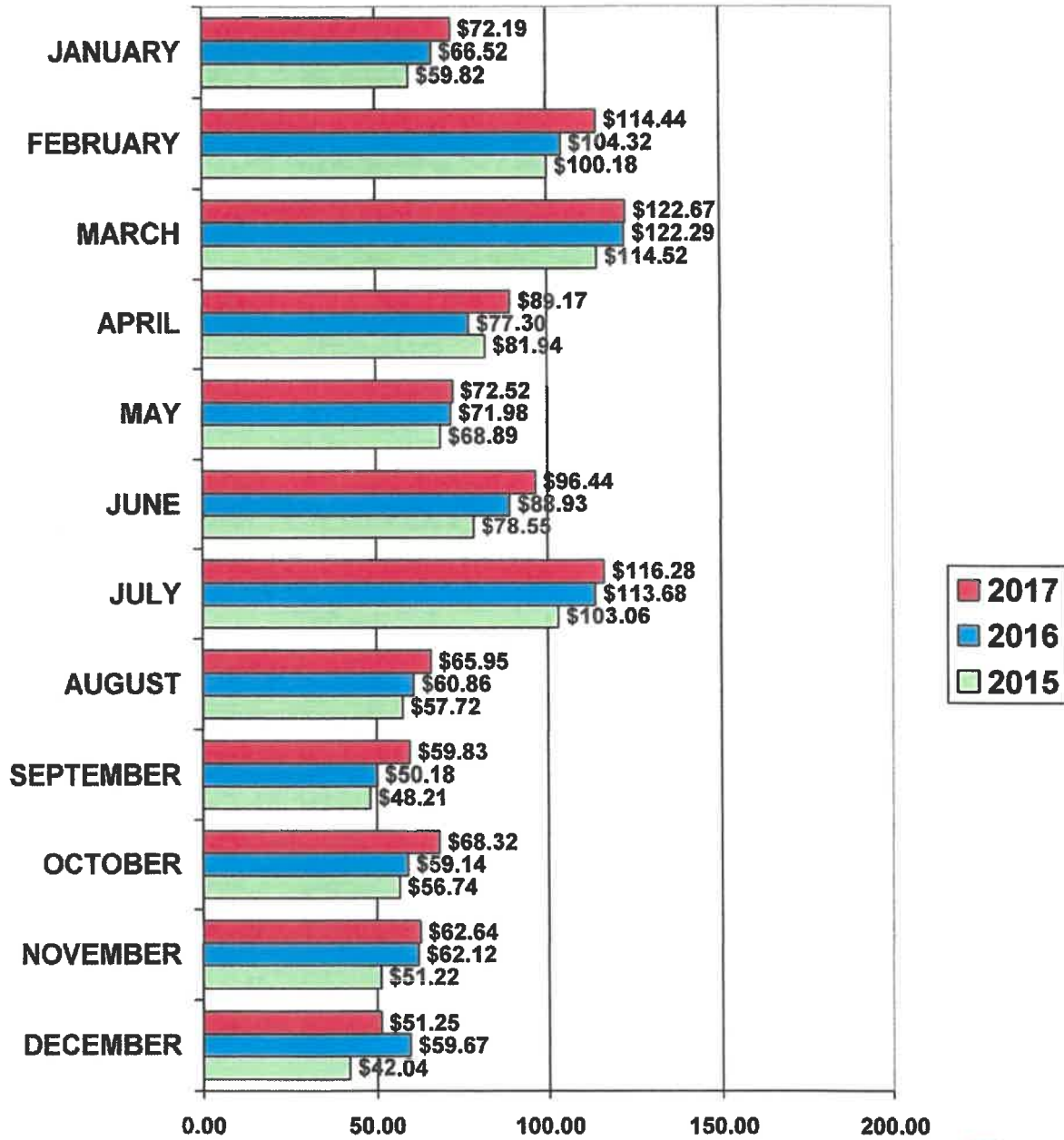


2017 YTD AVG. \$124.97 DECEMBER 2017 HIGH \$156.36
 2016 YTD AVG. \$122.22 DECEMBER 2017 LOW \$ 31.91
 2015 YTD AVG. \$121.83

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

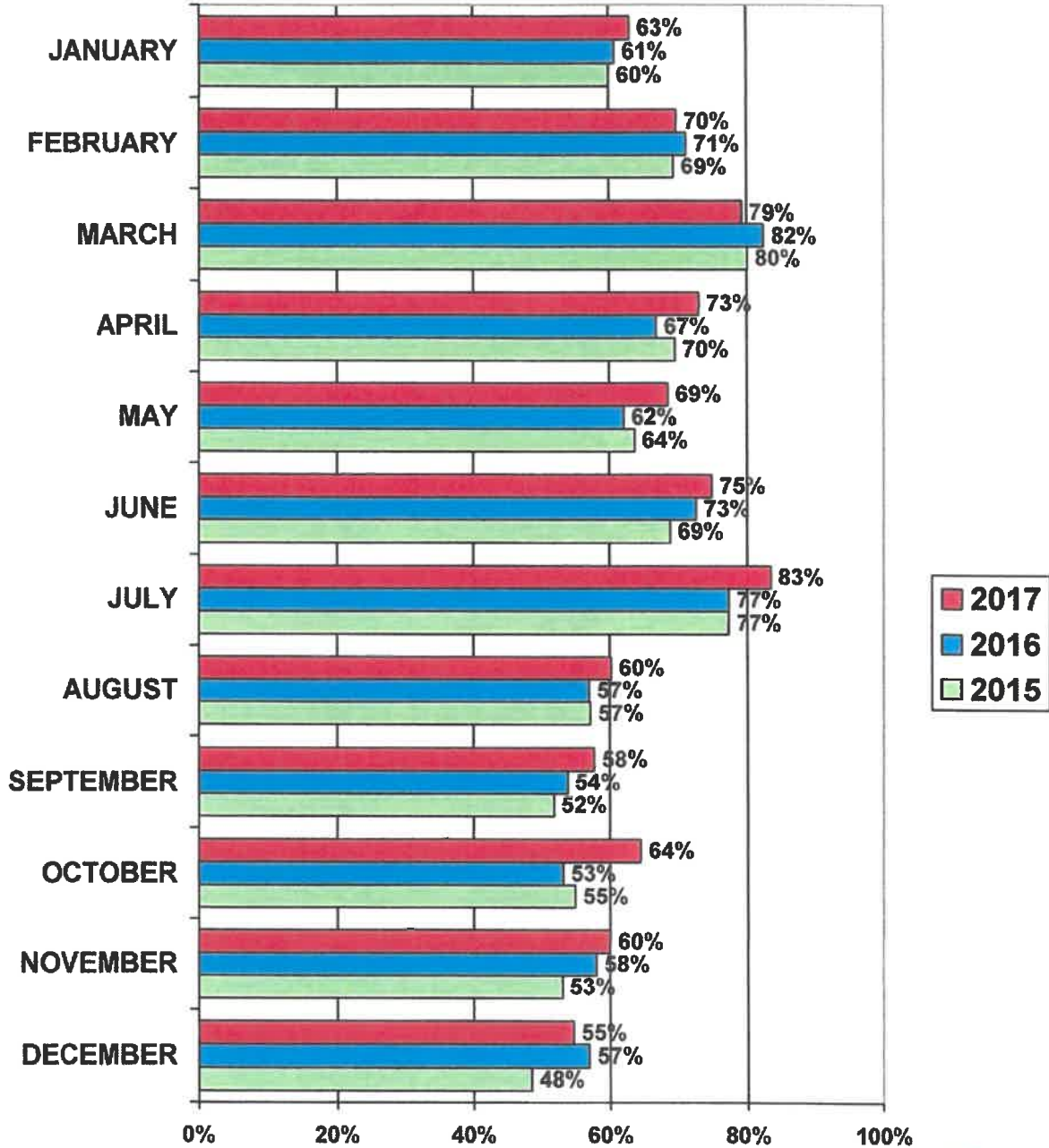


2017 YTD AVG. \$ 85.23
 2016 YTD AVG. \$ 80.84
 2015 YTD AVG. \$ 74.94

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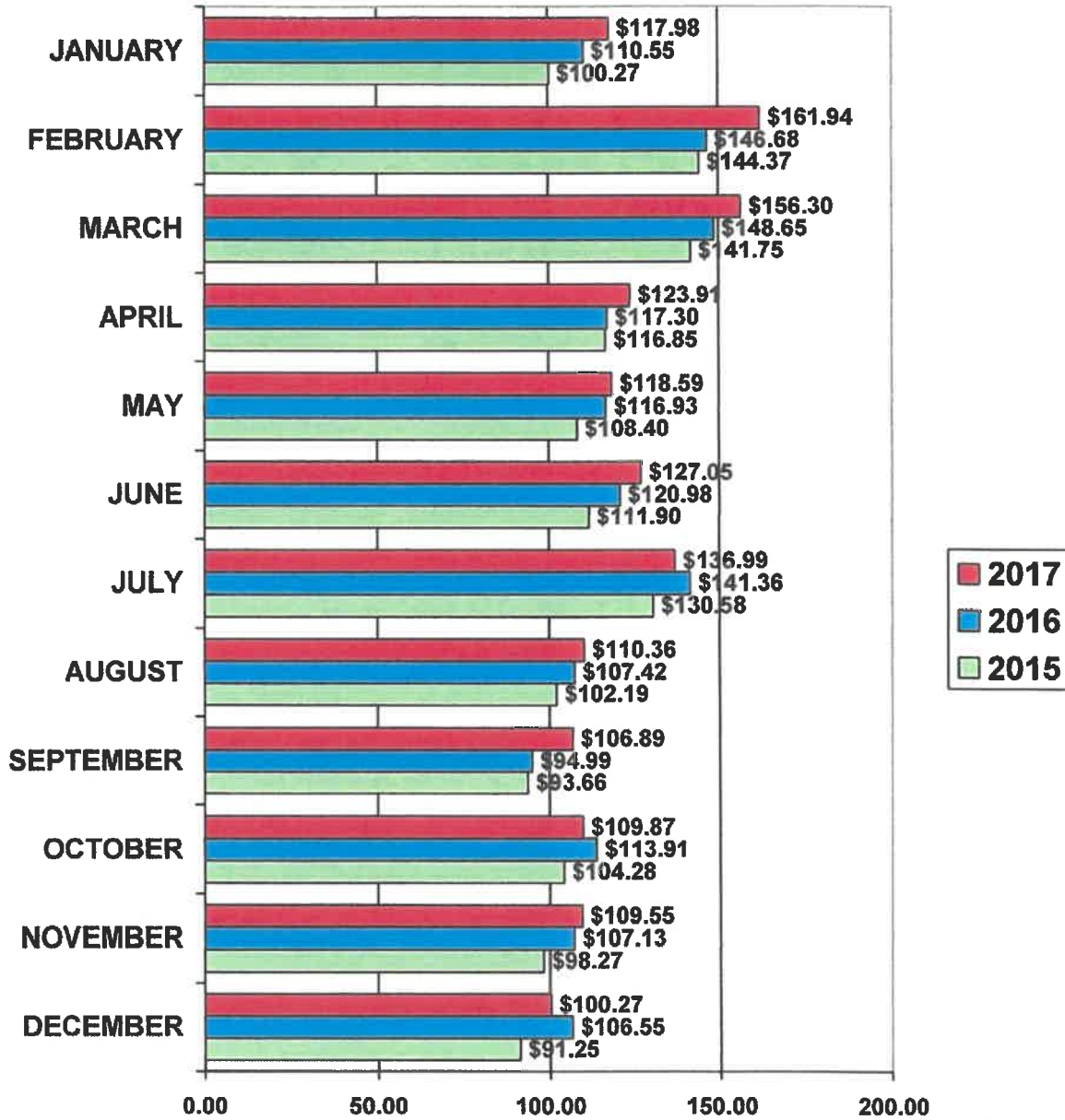
VOLUSIA HOTEL/MOTEL OCCUPANCY 2015 - 2017



2017 YTD AVG. 67% DECEMBER 2017 HIGH 90%
 2016 YTD AVG. 66% DECEMBER 2017 LOW 22%
 2015 YTD AVG. 64%

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VOLUSIA HOTEL/MOTEL AVERAGE DAILY RATE 2015 - 2017

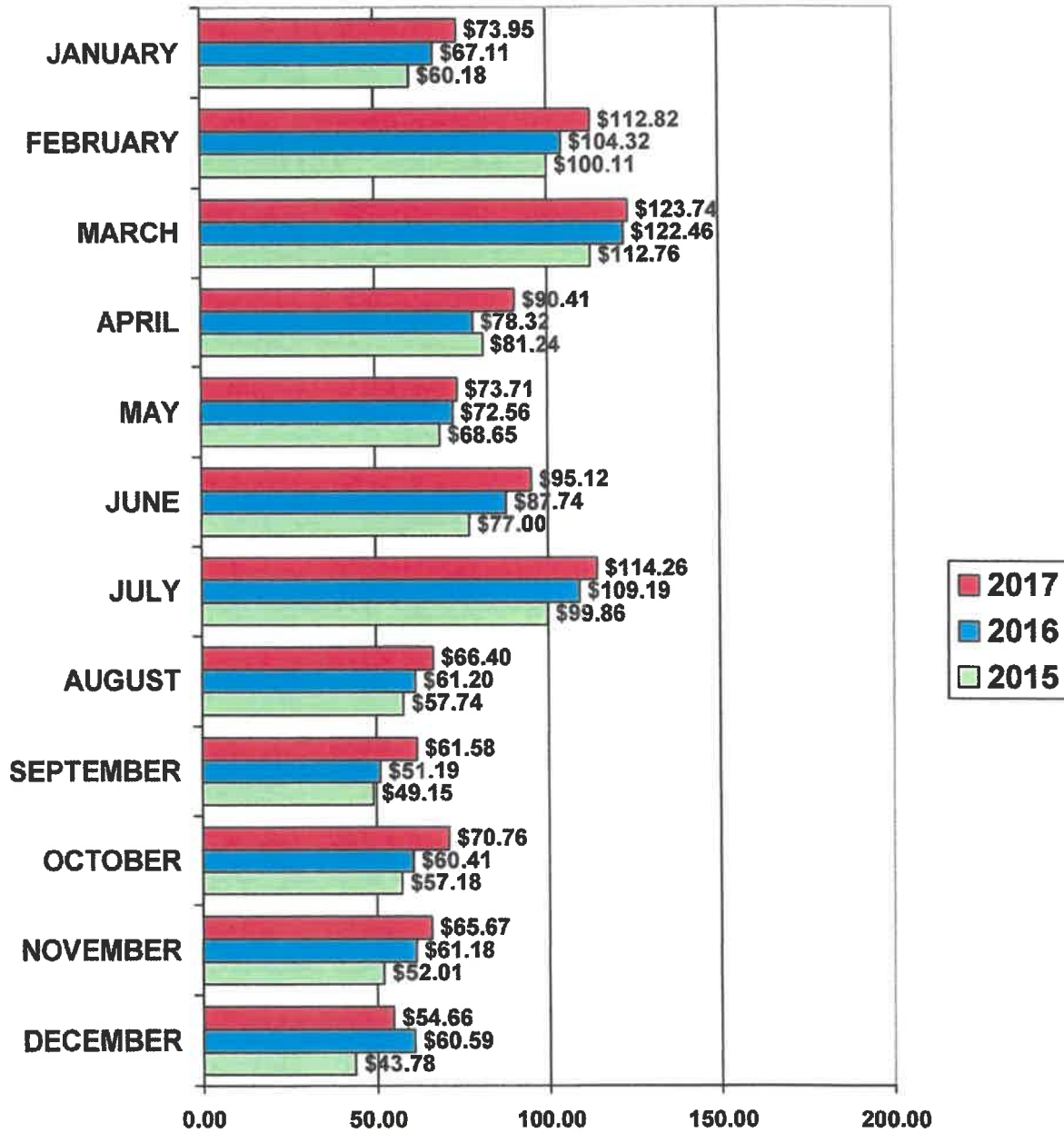


2017 YTD AVG. \$128.02 DECEMBER 2017 HIGH \$176.78
2016 YTD AVG. \$124.43 DECEMBER 2017 LOW \$ 31.91
2015 YTD AVG. \$117.47

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VOLUSIA HOTEL/MOTEL REV PAR BY MONTH 2015 - 2017

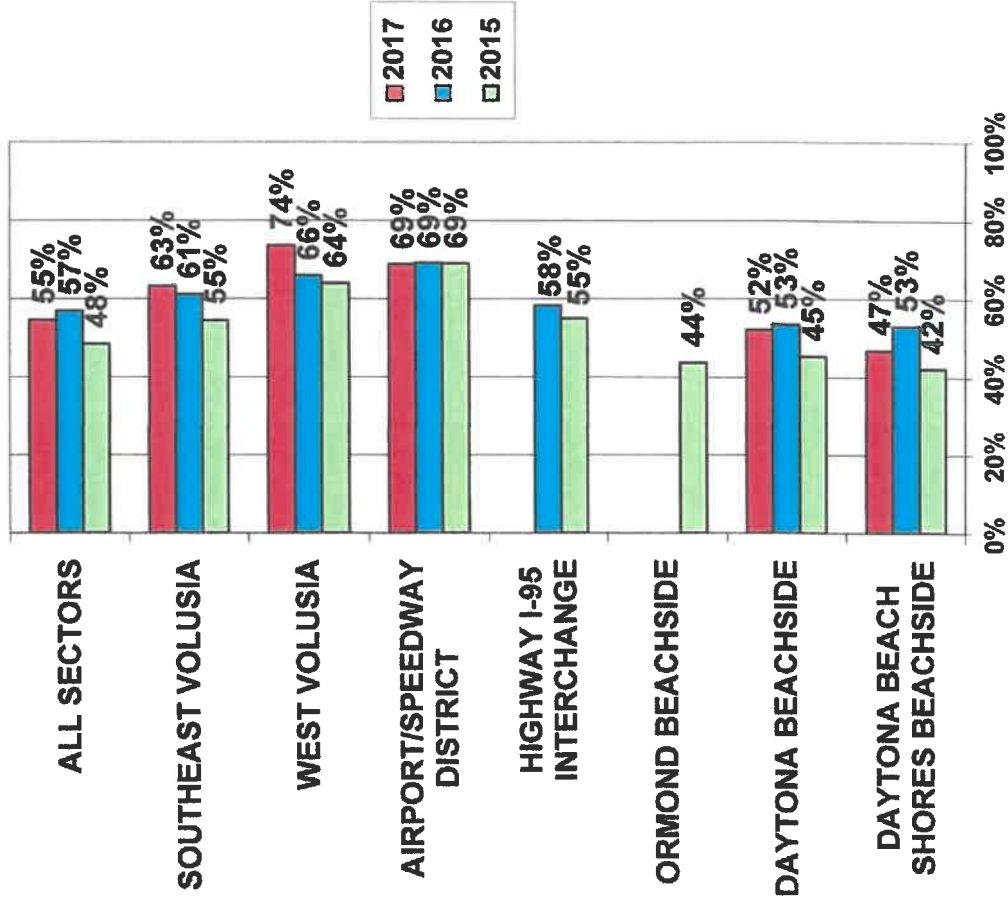


2017 YTD AVG. \$ 83.38
2016 YTD AVG. \$ 80.31
2015 YTD AVG. \$ 71.88

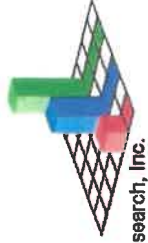
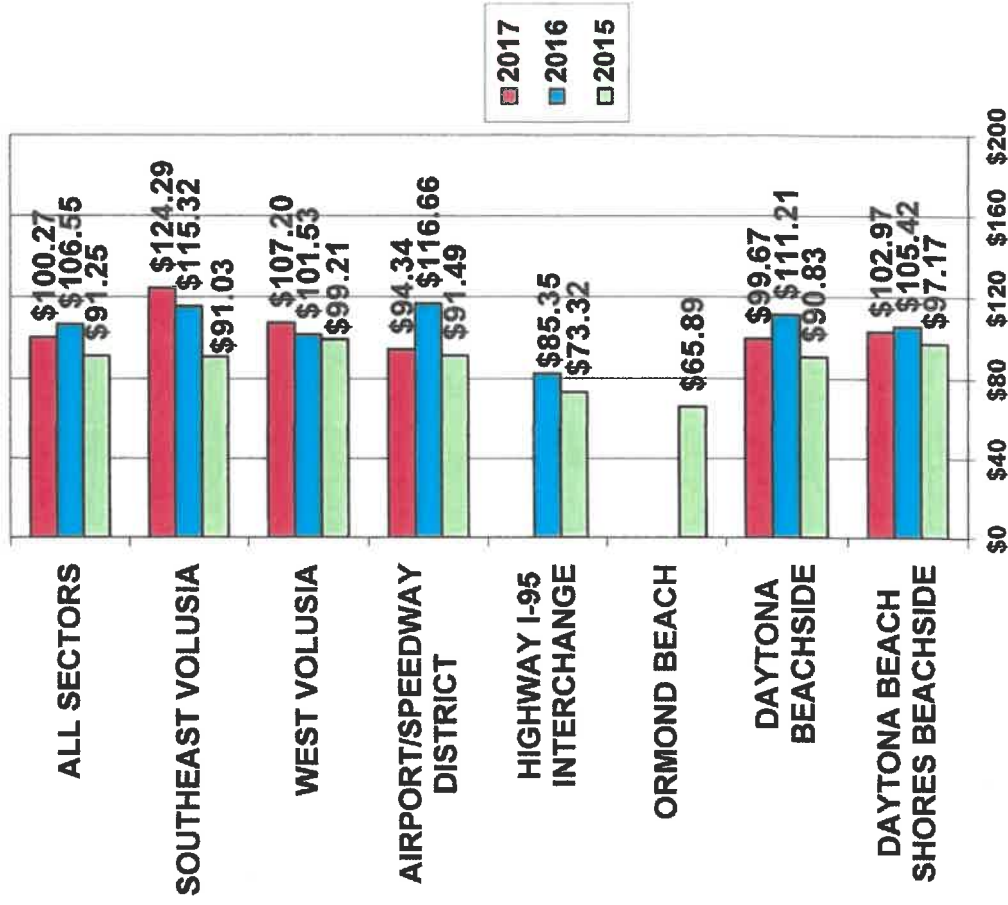
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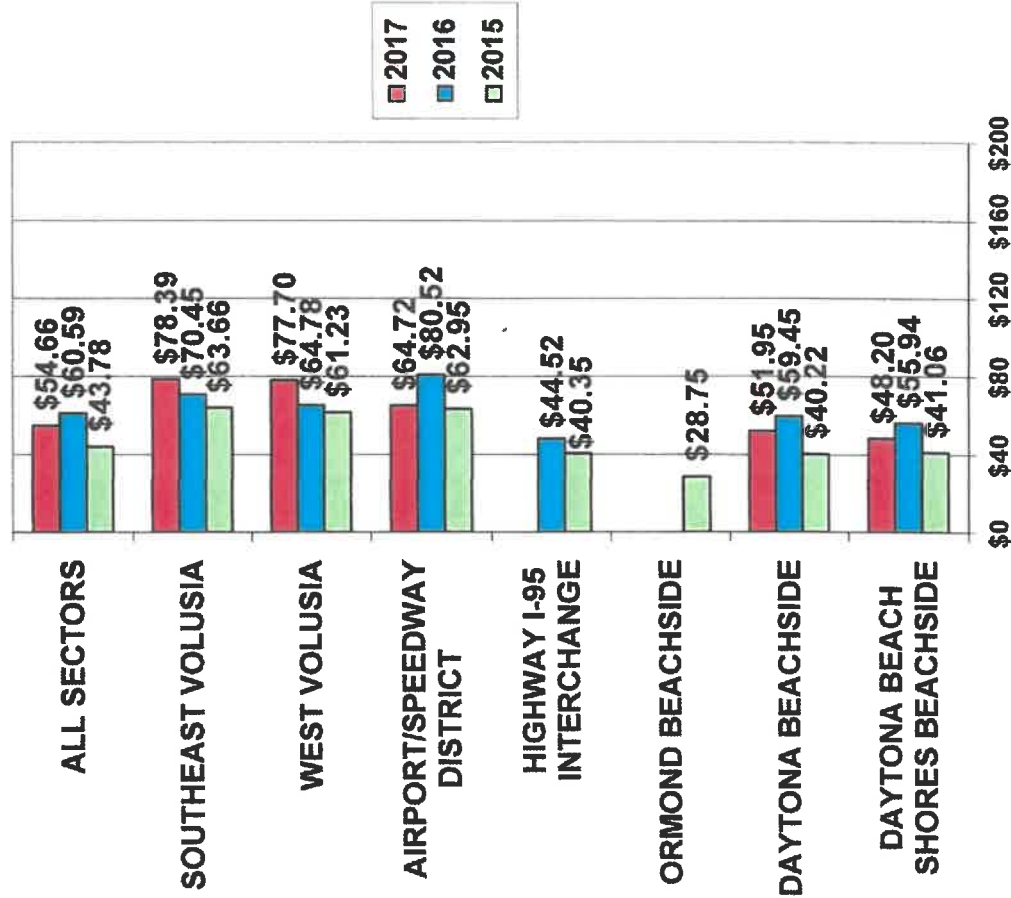
**VOLUSIA OCCUPANCY BY
AREA SECTORS -
DECEMBER 2015 - 2017**



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



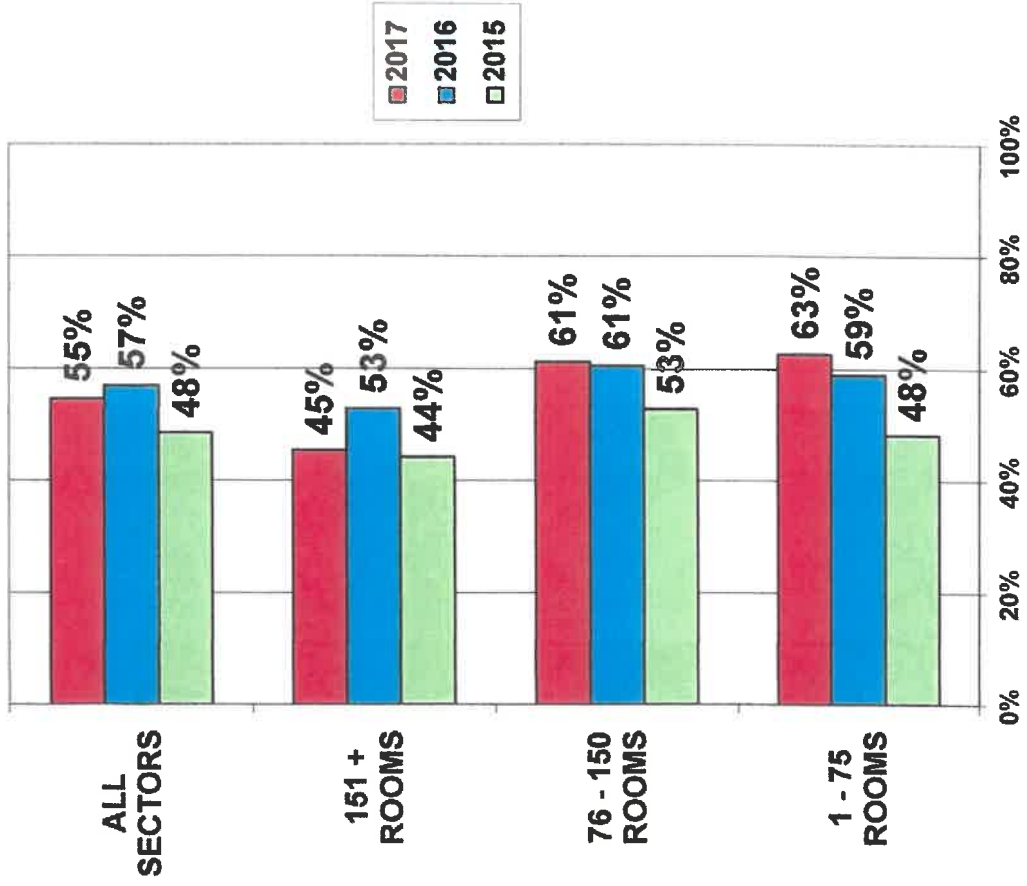
**VOLUSIA REV PAR BY
AREA SECTORS -
DECEMBER 2015 - 2017**



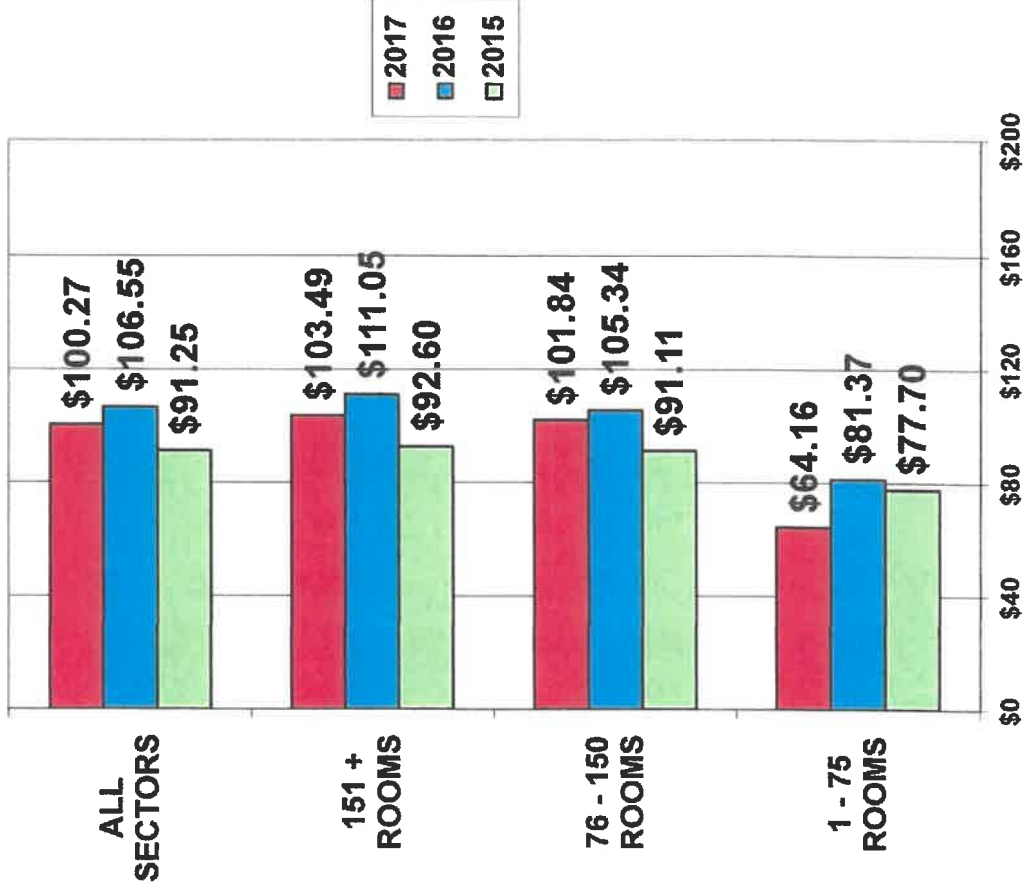
AREA SECTORS WITH FEWER THAN FIVE
PROPERTIES REPORTING ARE NOT INCLUDED.



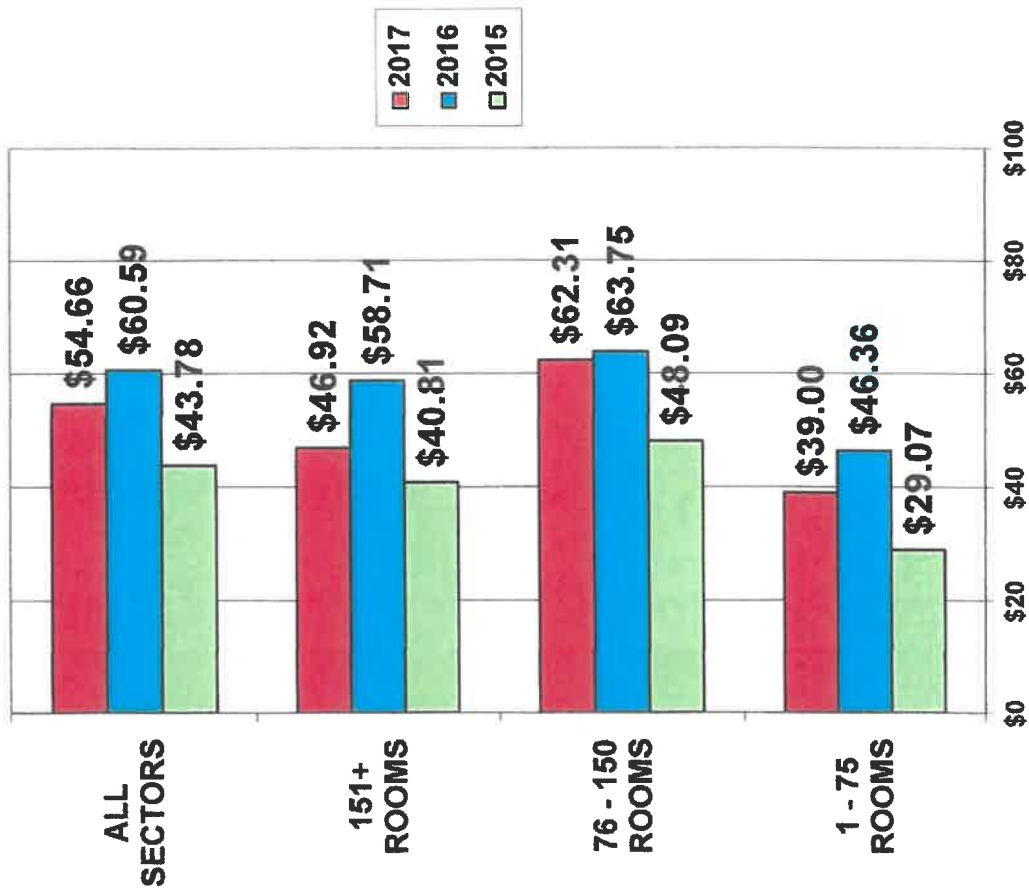
**VOLUSIA OCCUPANCY BY
PROPERTY SIZE -
DECEMBER 2015 - 2017**



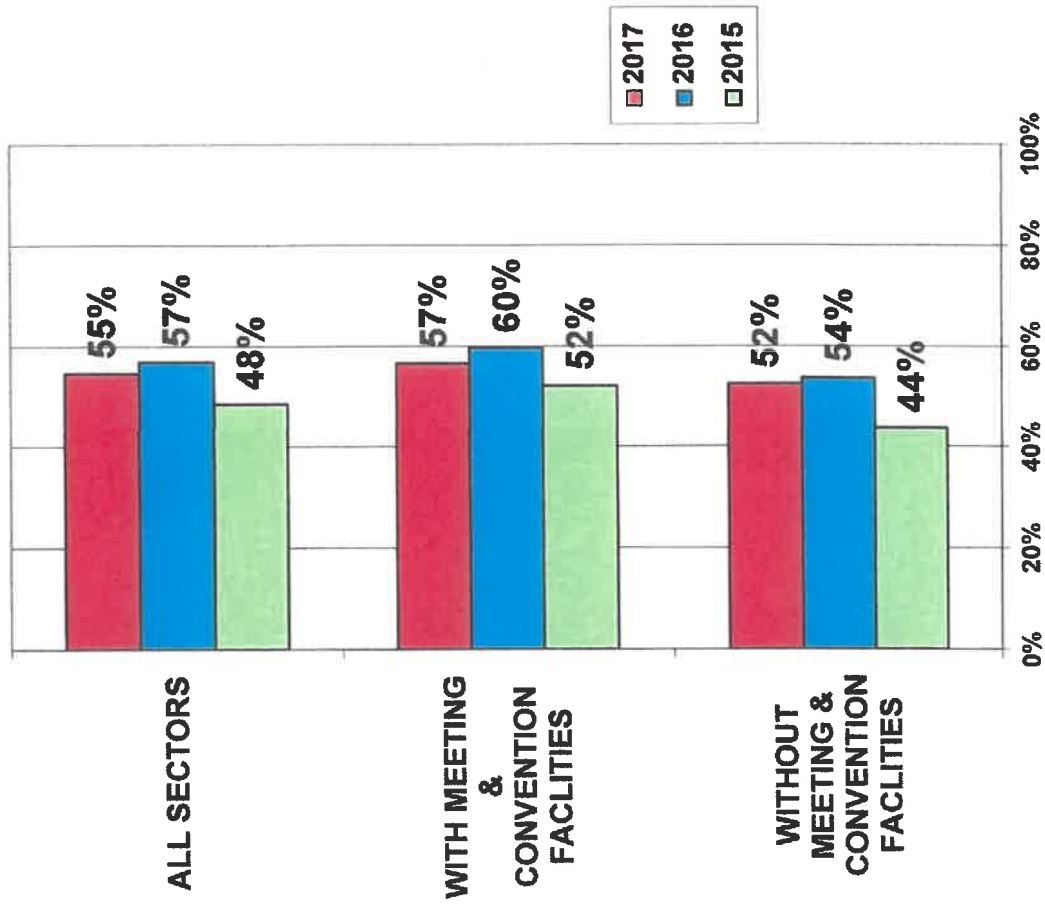
**VOLUSIA AVERAGE DAILY RATE BY
PROPERTY SIZE -
DECEMBER 2015 - 2017**



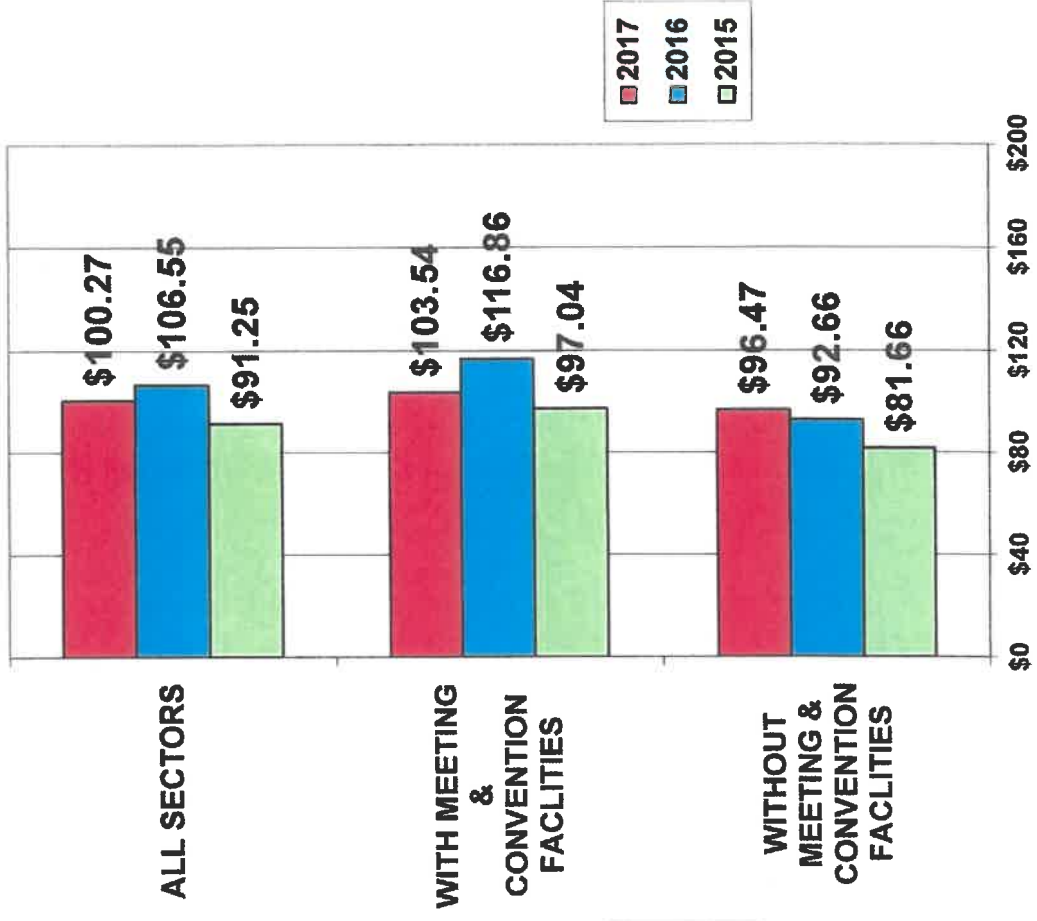
**VOLUSIA REV/IPAR BY
PROPERTY SIZE -
DECEMBER 2015 - 2017**



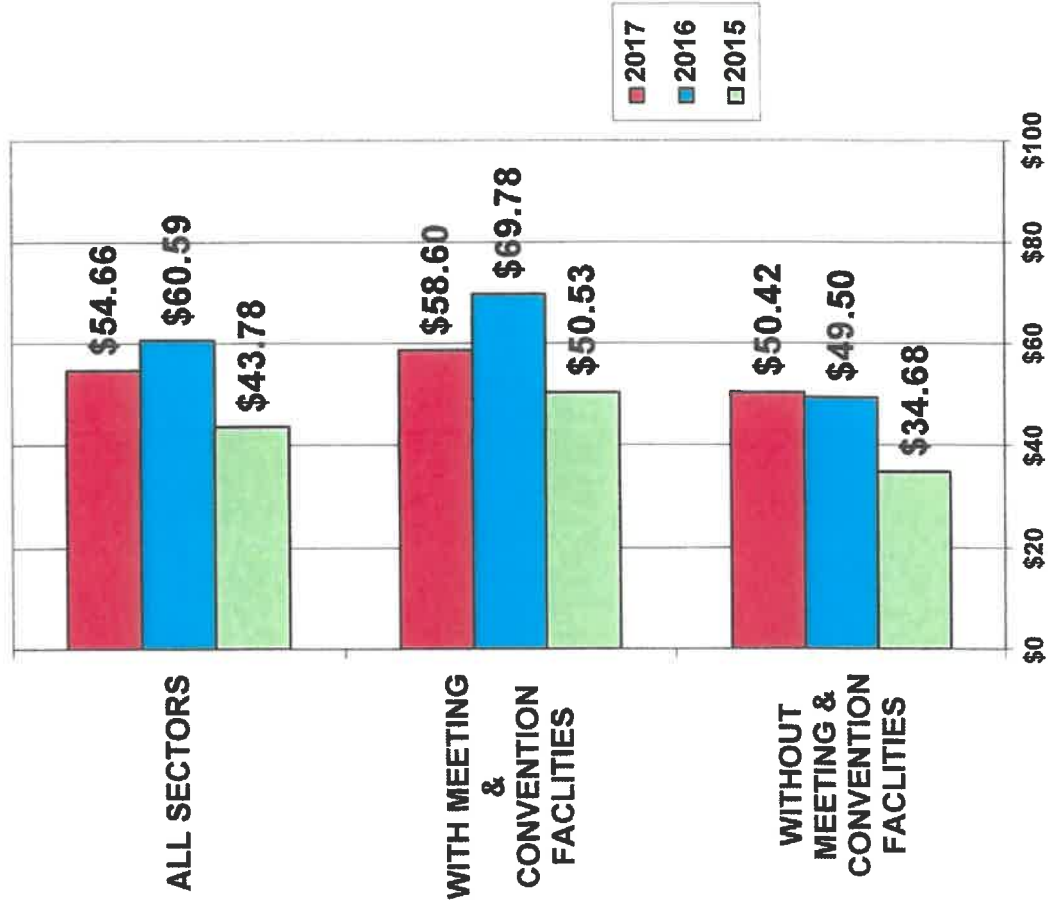
VOLUSIA OCCUPANCY BY MEETING & CONVENTION FACILITIES - DECEMBER 2015 - 2017



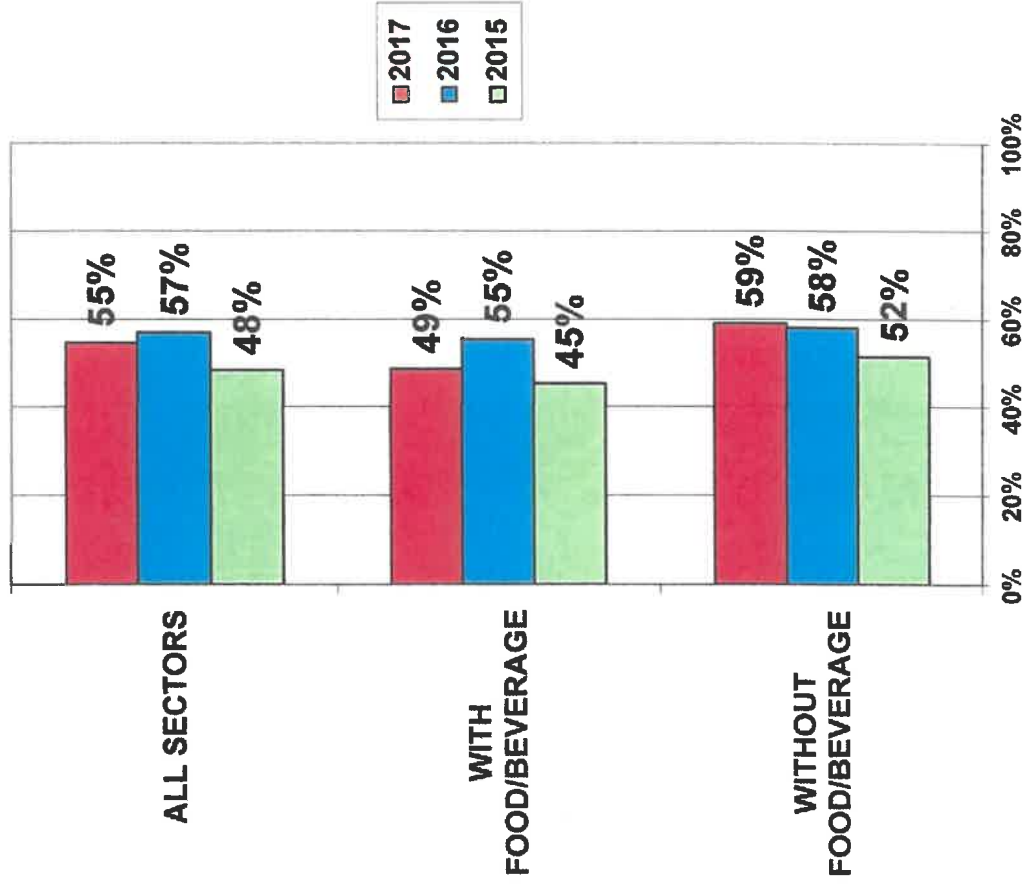
VOLUSIA AVERAGE DAILY RATE BY MEETING & CONVENTION FACILITIES - DECEMBER 2015 - 2017



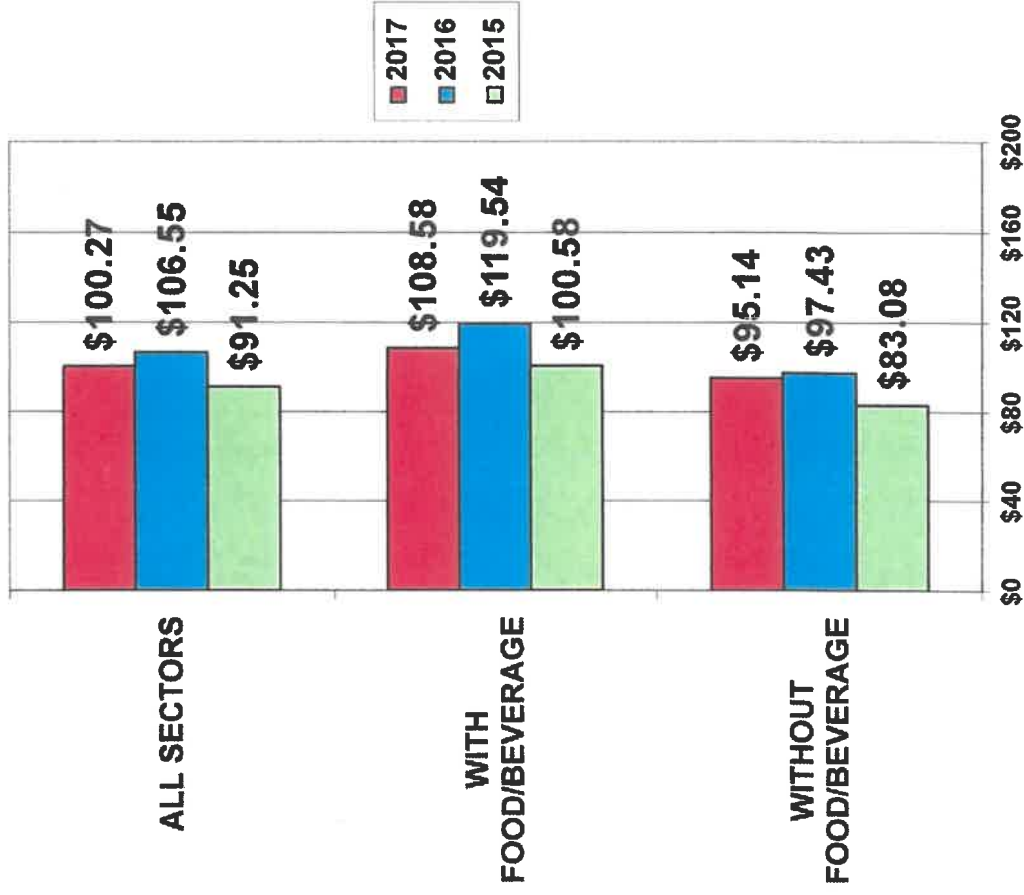
**VOLUSIA REVIPAR BY
MEETING & CONVENTION
FACILITIES - DECEMBER 2015 - 2017**



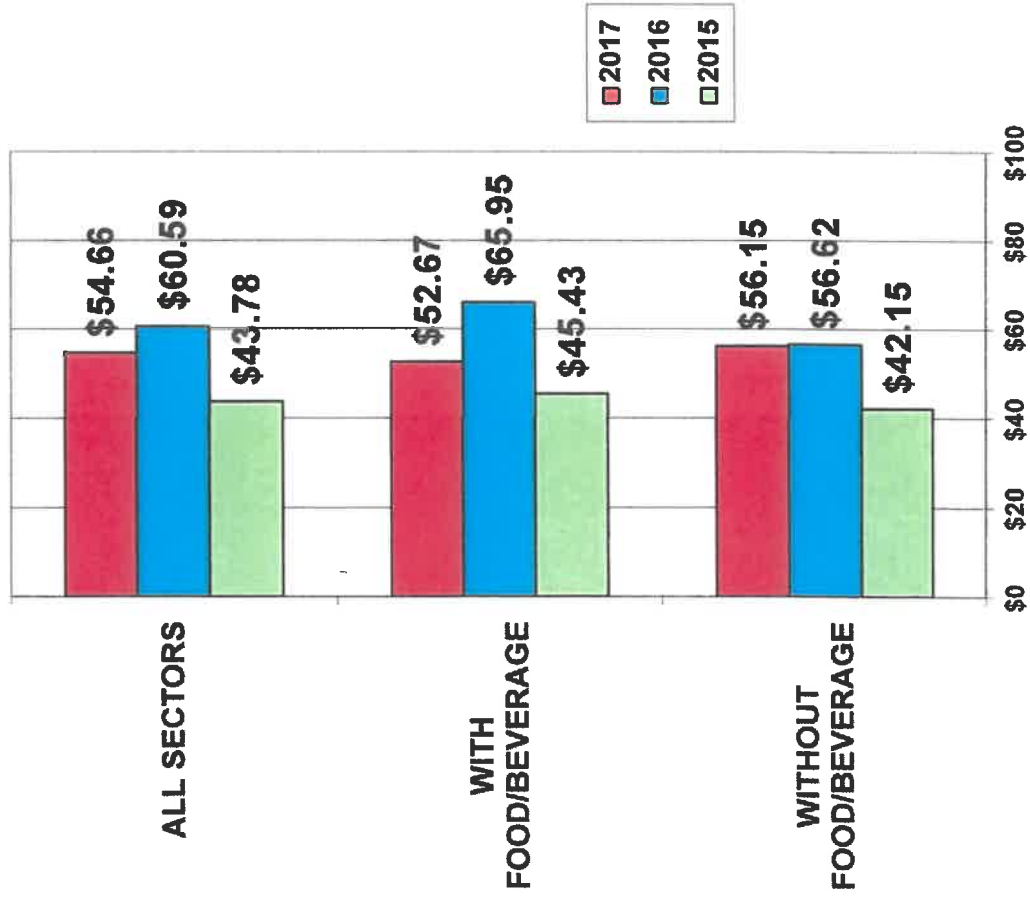
**VOLUSIA OCCUPANCY BY
FOOD/BEVERAGE -
DECEMBER 2015 - 2017**



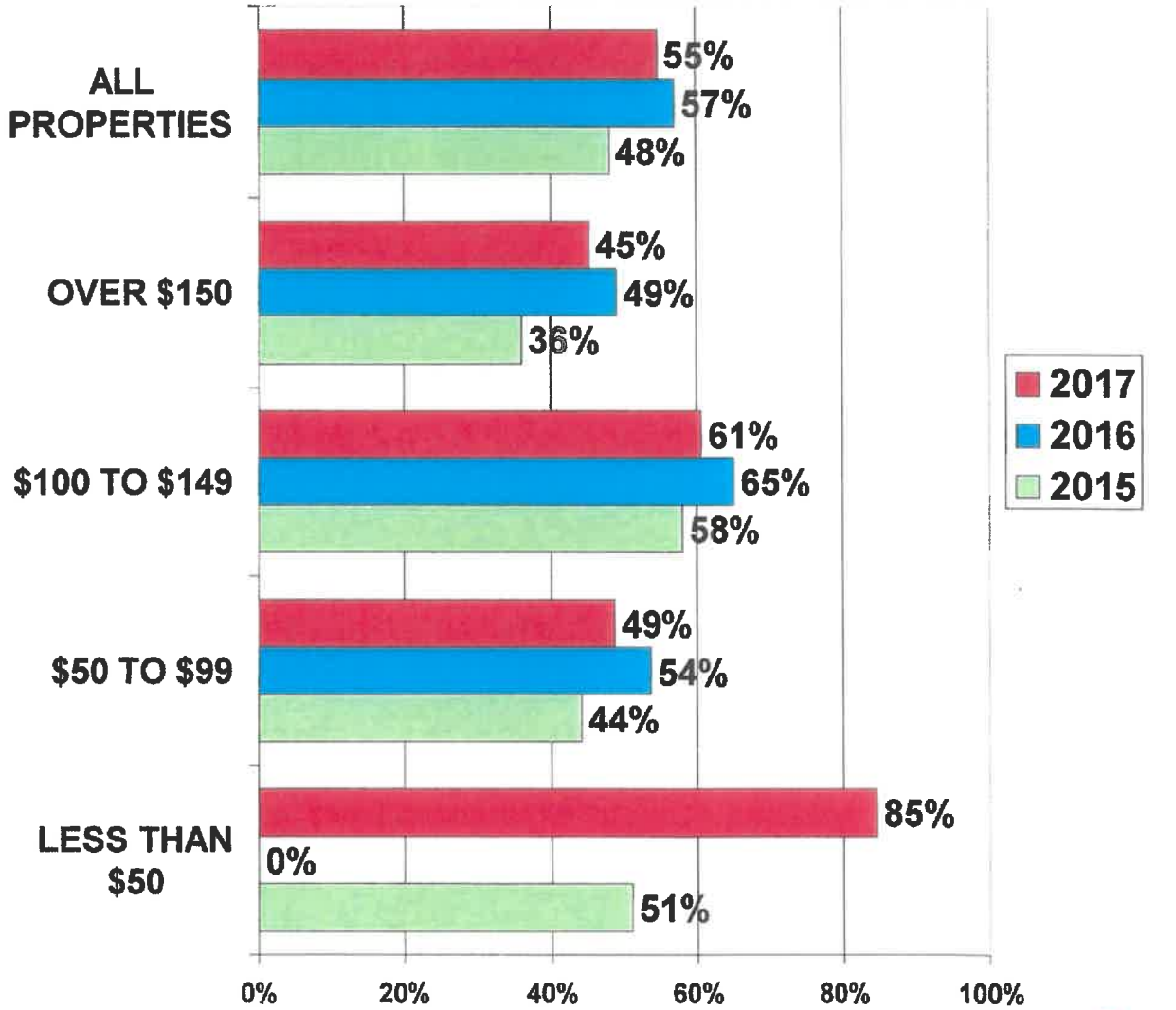
**VOLUSIA AVERAGE DAILY RATE BY
FOOD/BEVERAGE
DECEMBER 2015 - 2017**



**VOLUSIA REV/PAR BY
FOOD/BEVERAGE -
DECEMBER 2015 - 2017**

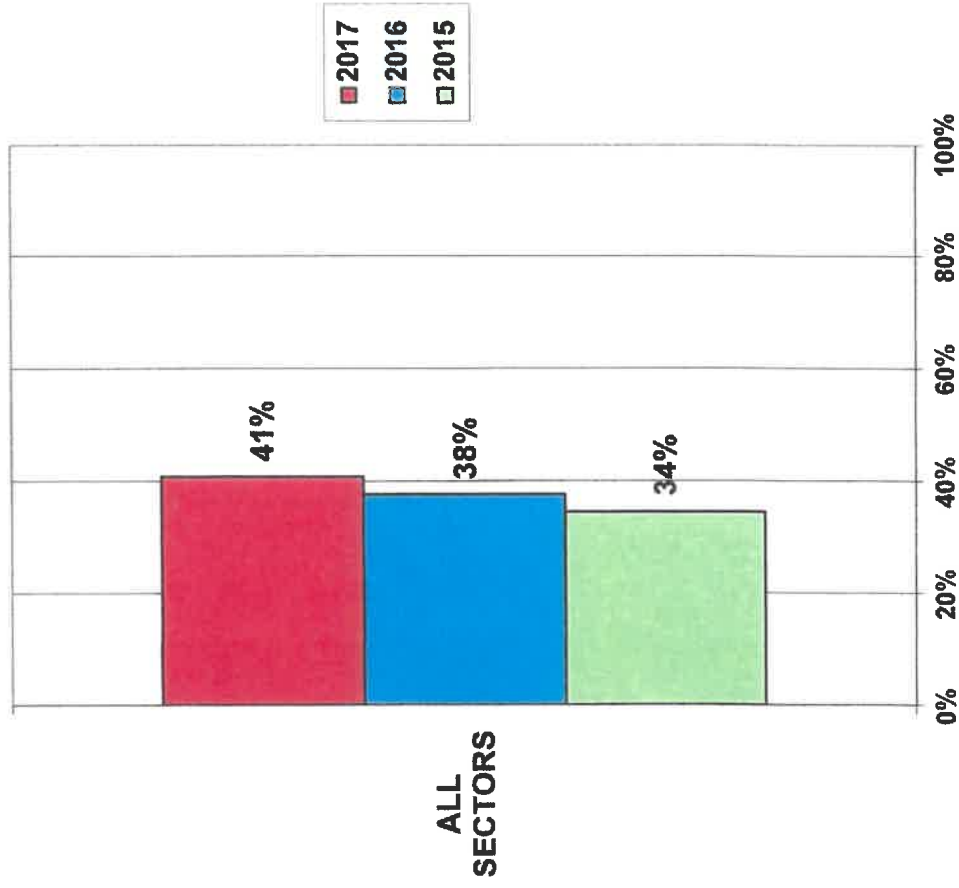


VOLUSIA HOTEL/MOTEL OCCUPANCY BY PRICE RANGE - DECEMBER 2015 - 2017

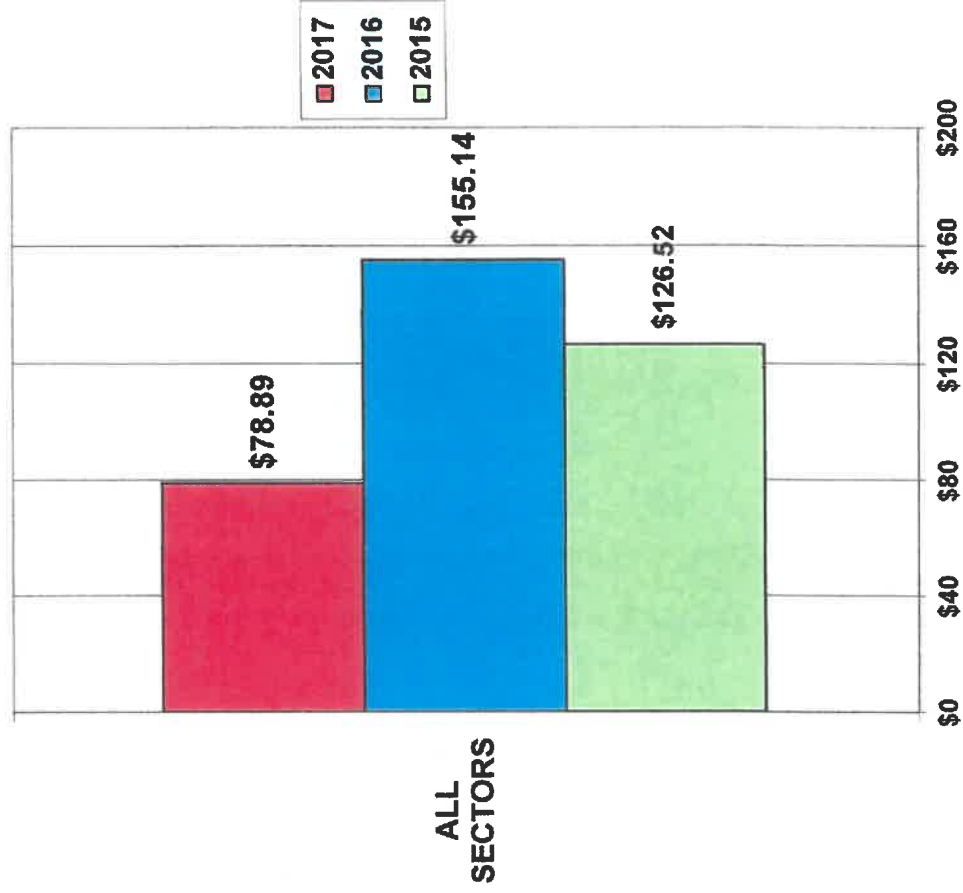


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**VOLUSIA OCCUPANCY
BY CONDO/TIMESHARES -
DECEMBER 2015 - 2017**



**VOLUSIA AVERAGE DAILY RATE BY
CONDO/TIMESHARES -
DECEMBER 2015 - 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	C	X	X
HOLIDAY INN EXPRESS OCEANFRONT	100	--	--	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	C	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 & SUITES 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	X	X	X	X	X
WYNDHAM OCEAN WALK	127	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	X	X	X	X	X
CORAL SANDS OCEAN FRONT	102	--	X		X	X	X	X	X	X	X	X	
COVE ON ORMOND BEACH	112	--	--	X	X	X	X	X			X		X
HIGHWAY I-95 INTERSECTIONS													
BEST WESTERN SPEEDWAY	151	X	X	X	X	X	X	X	X	X	X	X	X
*COUNTRY INN & SUITES PORT ORANGE	87	X	X	X	X	X	X	X	X	X	X	X	X
HOWARD JOHNSON DESTINATION DAYTONA	79	X	X	X	X	X	X	X	X	X	X	X	X
SLEEP INN	82	X	X	X	X	X	X	X	X				X
AIRPORT/SPEEDWAY DISTRICT													
DAYTONA BEACH COURTYARD	122	X	X	X	X	X	X	X	X	X	X	X	X
DAYTONA BEACH RESIDENCE INN	122	X	X	X	X	X	X	X	X	X	X	X	X
HAMPTON INN AIRPORT	122	X	X	X	X	X	X	X	X	X	X	X	X
HILTON GARDEN INN D B AIRPORT	115	X	X	X	X	X	X	X	X	X	X	X	X
HOMWOOD SUITES	94	X	X	X	X	X		X		X	X	X	X
QUALITY INN DAYTONA	64	X	X	X	X	X	X	X	X	X	X	X	X
WEST VOLUSIA													
ALLING HOUSE BED AND BREAKFAST ORANGE CITY	8	X	X	X	X	X	X	X	X	X	X	X	X
ARTISAN DOWNTOWN	8	X	X	X	X	X	X	X	X	X	X	X	X
COMFORT INN DELAND	68	X	X	X	X	X	X	X	X	X	X	X	X
DAYS INN ORANGE CITY	37	X	X			X		X	X			X	X
HAMPTON INN DEBARY	76	X	X	X	X	X	X	X	X	X	X	X	X
HAMPTON INN DELAND	94	X	X	X	X	X	X	X	X	X	X	X	X
HOLIDAY IN EXPRESS ORANGE CITY	114				X	X	X	X	X	X	X	X	X
HONTOON LANDING	18	X	X	X	X	X	X	X	X	CLOSED		X	X
SE VOLUSIA													
BEST WESTERN HOTEL	101	X	X	X	X	X	X	X	X	X	X	X	X
COASTAL WATERS INN	40	X	X	X	X	X	X	X	X	X			
*COUNTRY INN & SUITES PORT ORANGE	87	X	X	X	X	X	X	X	X	X	X	X	X
HAMPTON INN	122	X	X	X	X	X	X	X	X		X	X	X
INN ON THE AVENUE	6	X	X	X		X	X		X		X	X	
OCEAN TRILLIUM SUITES	32	X	X	X	X	X	X	X	X	X	X	X	X

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

