

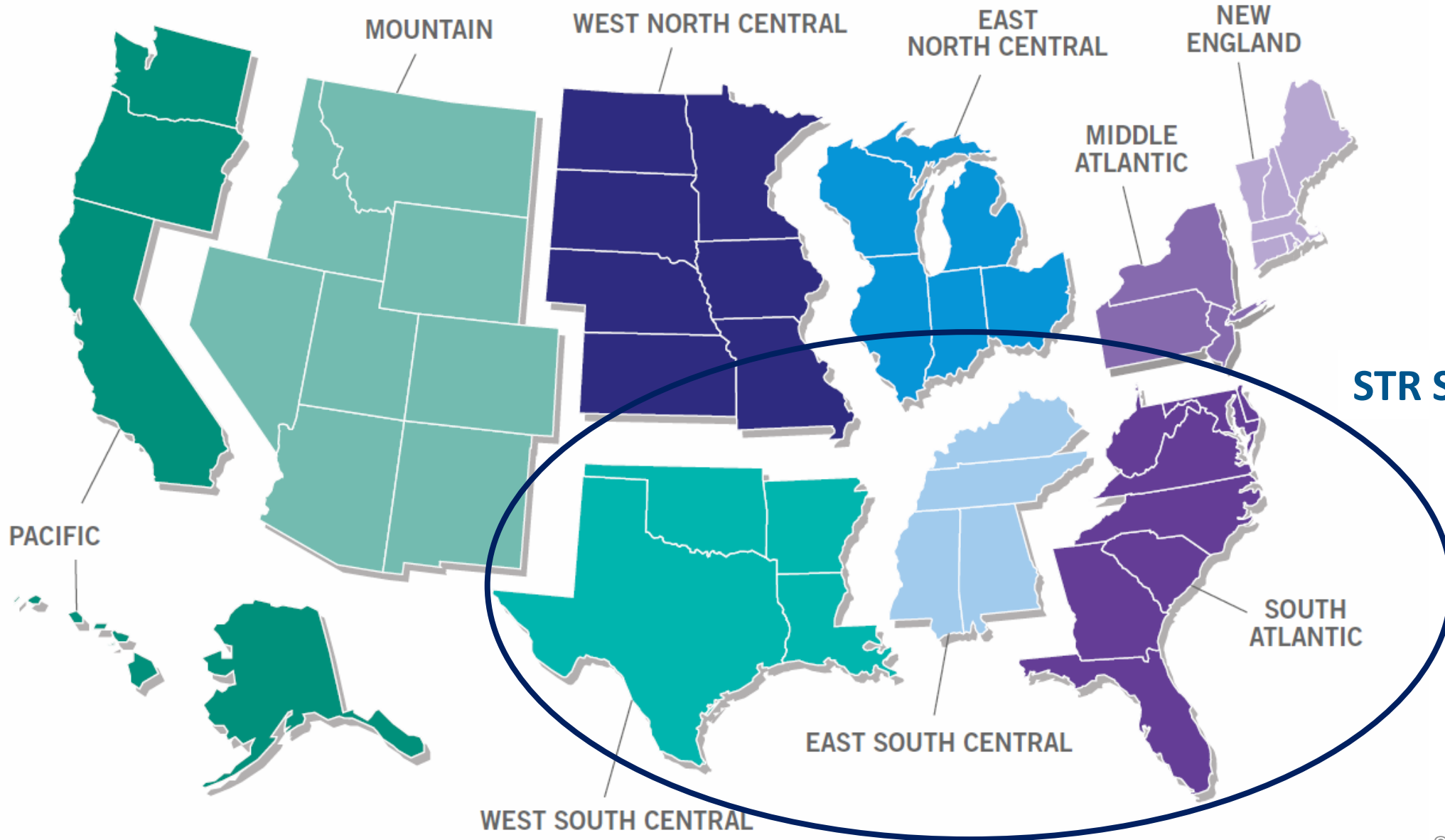


What's Driving the Food & Beverage Explosion?

Southern Lodging Summit
August 29, 2018

Veronica Andrews
Director, Digital Data Solutions

STR Region Map



STR Southern Regions



Providing A Voice At The Table

Total US

405 AVG rooms
25.5K AVG SqFt meeting space
248 AVG seats

		<u>%ch</u>
OCC	76.9%	0.8%
ADR	\$219	1.6%
RevPAR	\$168	2.4%
Rm Rev		2.4%
Supply		-0.1%
Demand		0.7%

Southern Regions

406 AVG rooms
29.4K AVG SqFt meeting space
261 AVG seats

		<u>%ch</u>
OCC	74.2%	0.8%
ADR	\$197	1.8%
RevPAR	\$147	2.7%
Rm Rev		2.7%
Supply		0.1%
Demand		0.9%

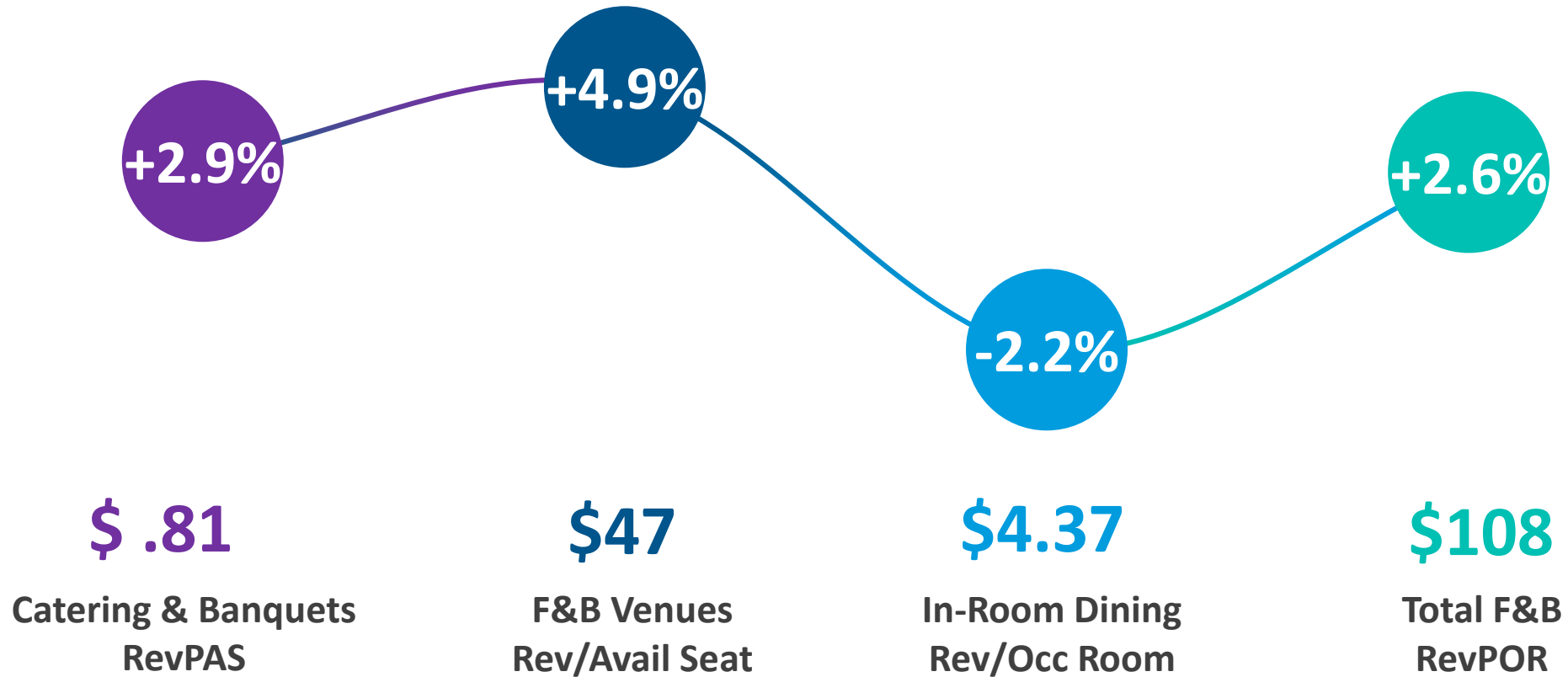


Total U.S. and STR U.S. Southern Regions Same Store Performance – June 2018 12MMA

Same Store – based on 24 consecutive months F&B reporting

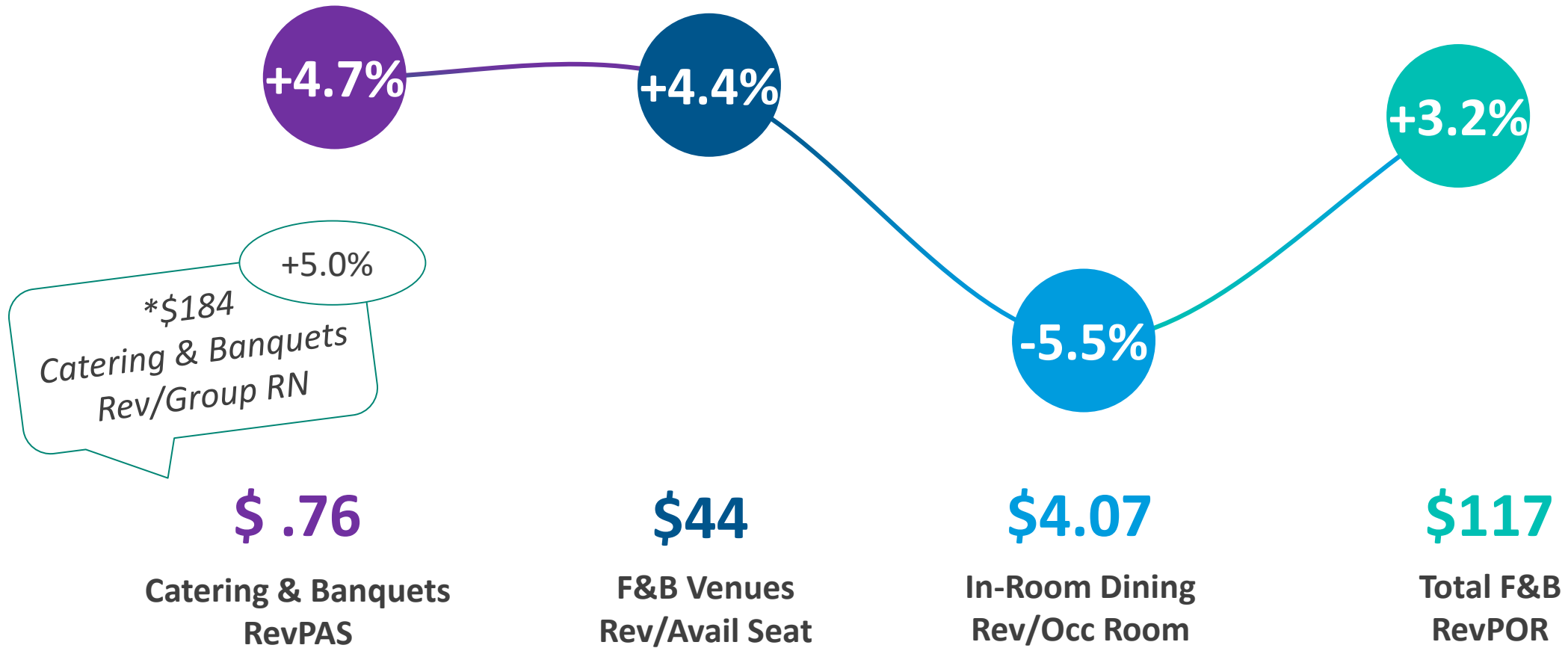
* South Atlantic, East South Central, West South Central

What's Cooking with Hotel F&B?





What Does Southern Hospitality Look Like?



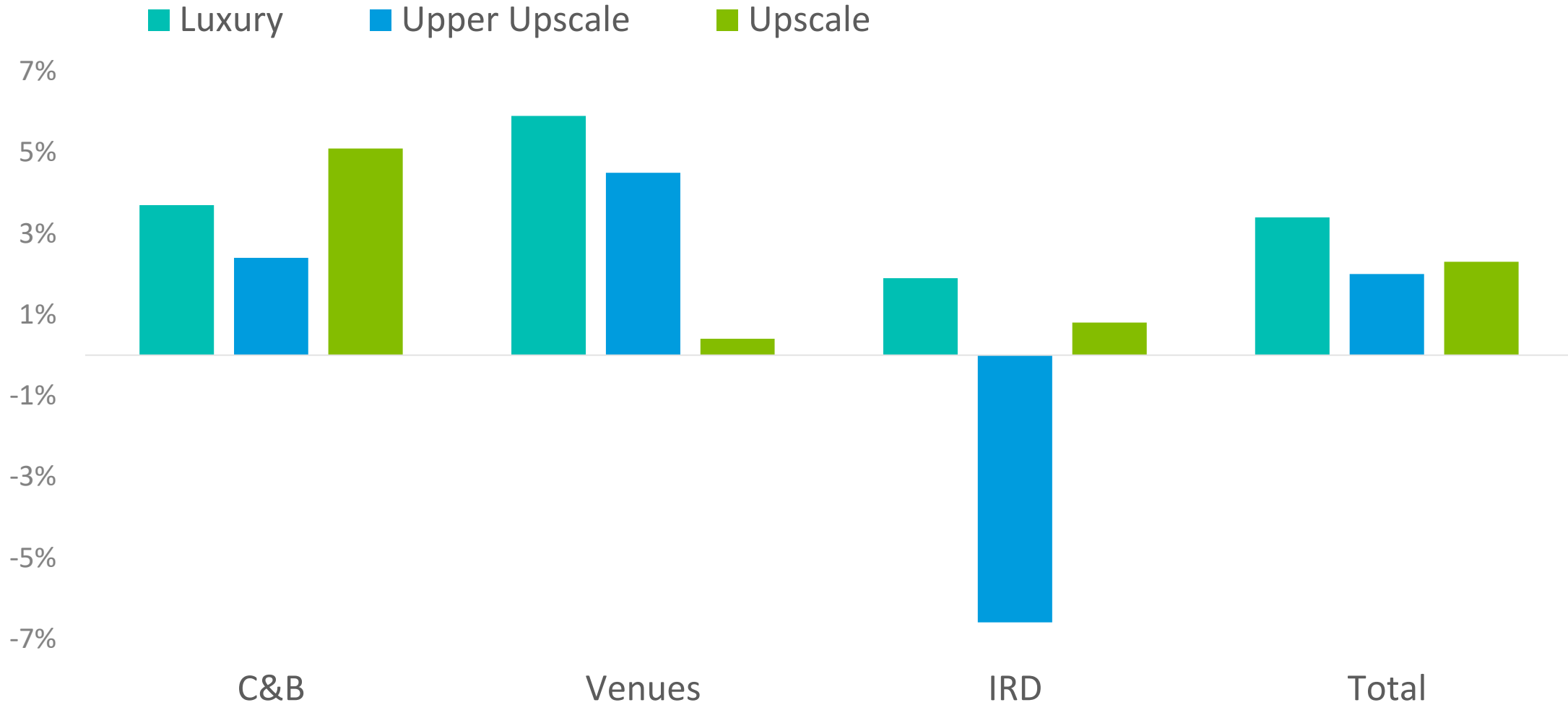
STR Southern Regions* - F&B KPIs and % Change, 12MMA June 2018

Same Store analysis includes properties with minimum 24 consecutive months' reporting through June 2018

* South Atlantic, East South Central, West South Central

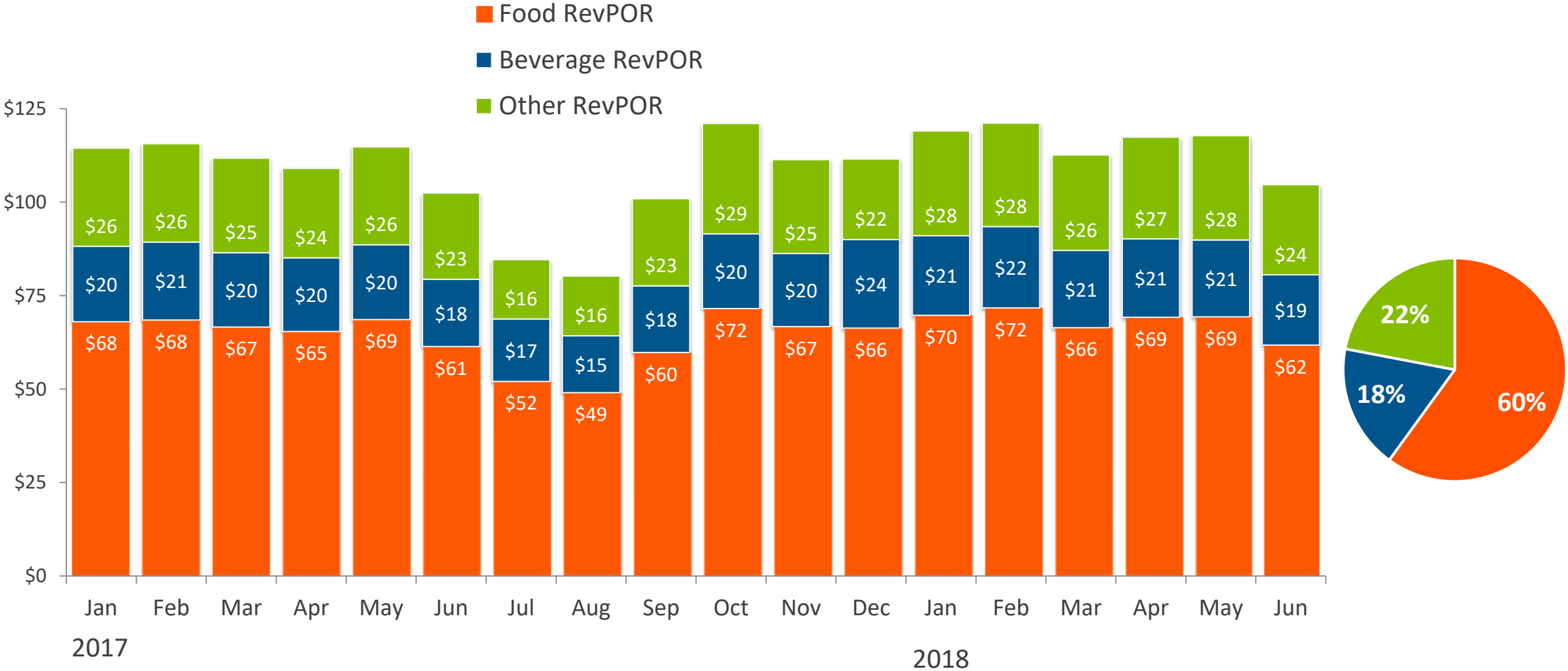


Hotel F&B Is Looking Up





Total U.S. F&B RevPOR by Month

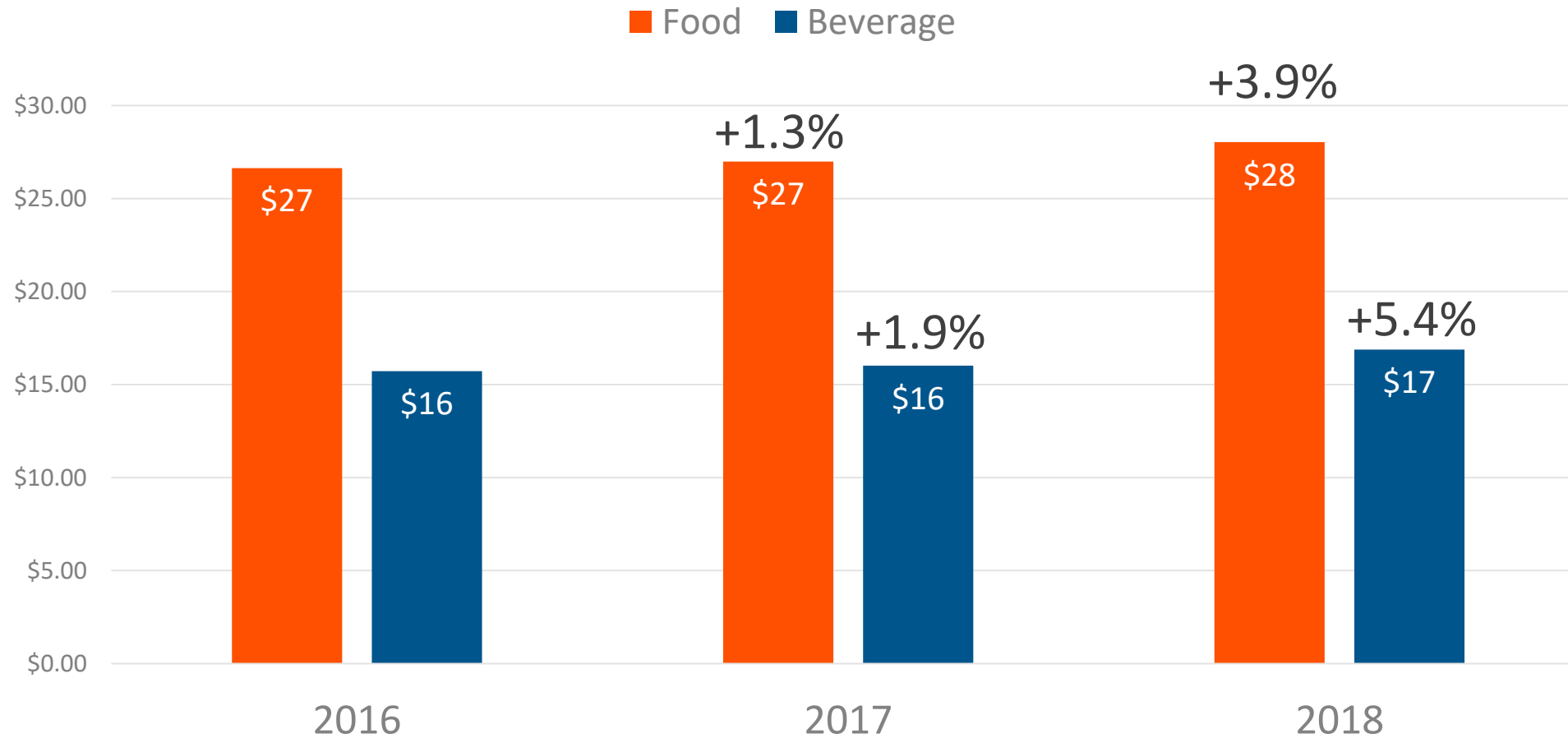


Total U.S. Monthly F&B Revenue Per Occupied Room, January 2017 – June 2018



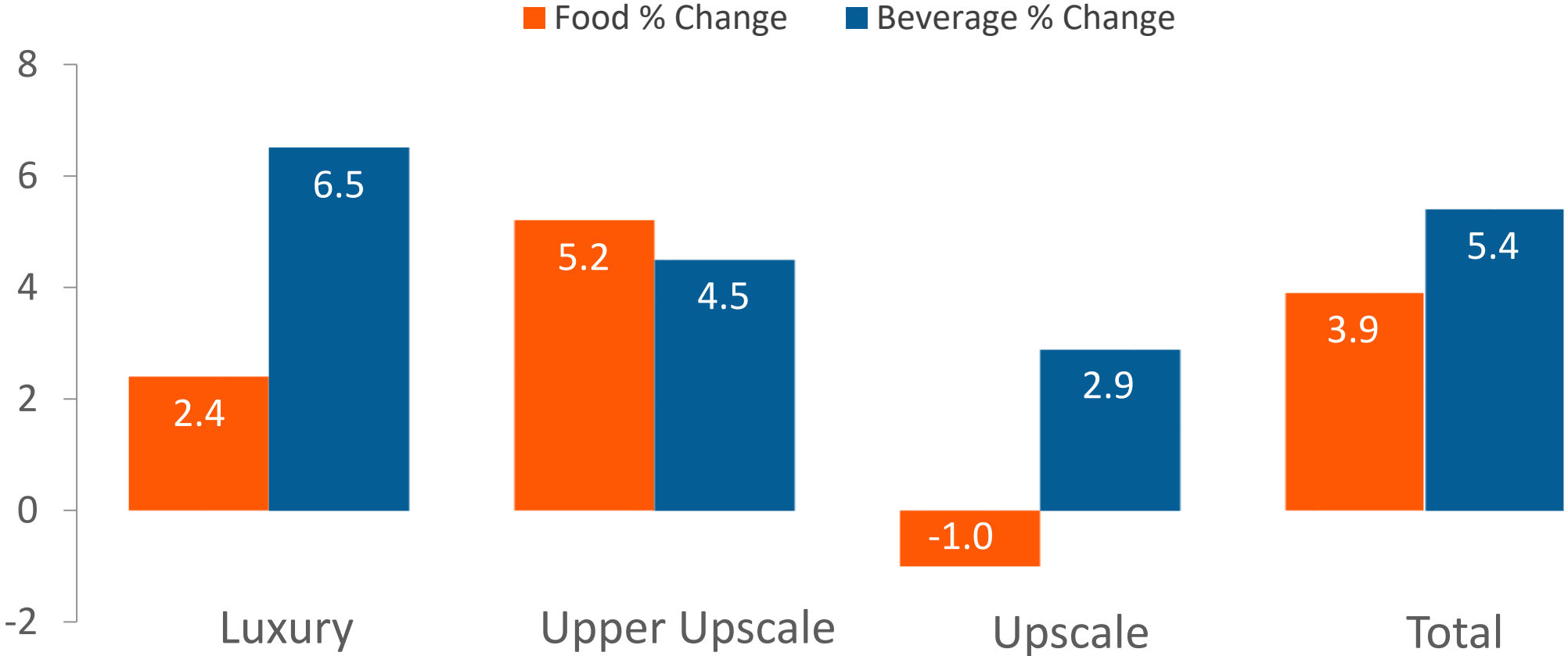
Innovation Pays Off for Venues Food *and* Beverage

Revenue per Available Seat Grows Consistently YOY



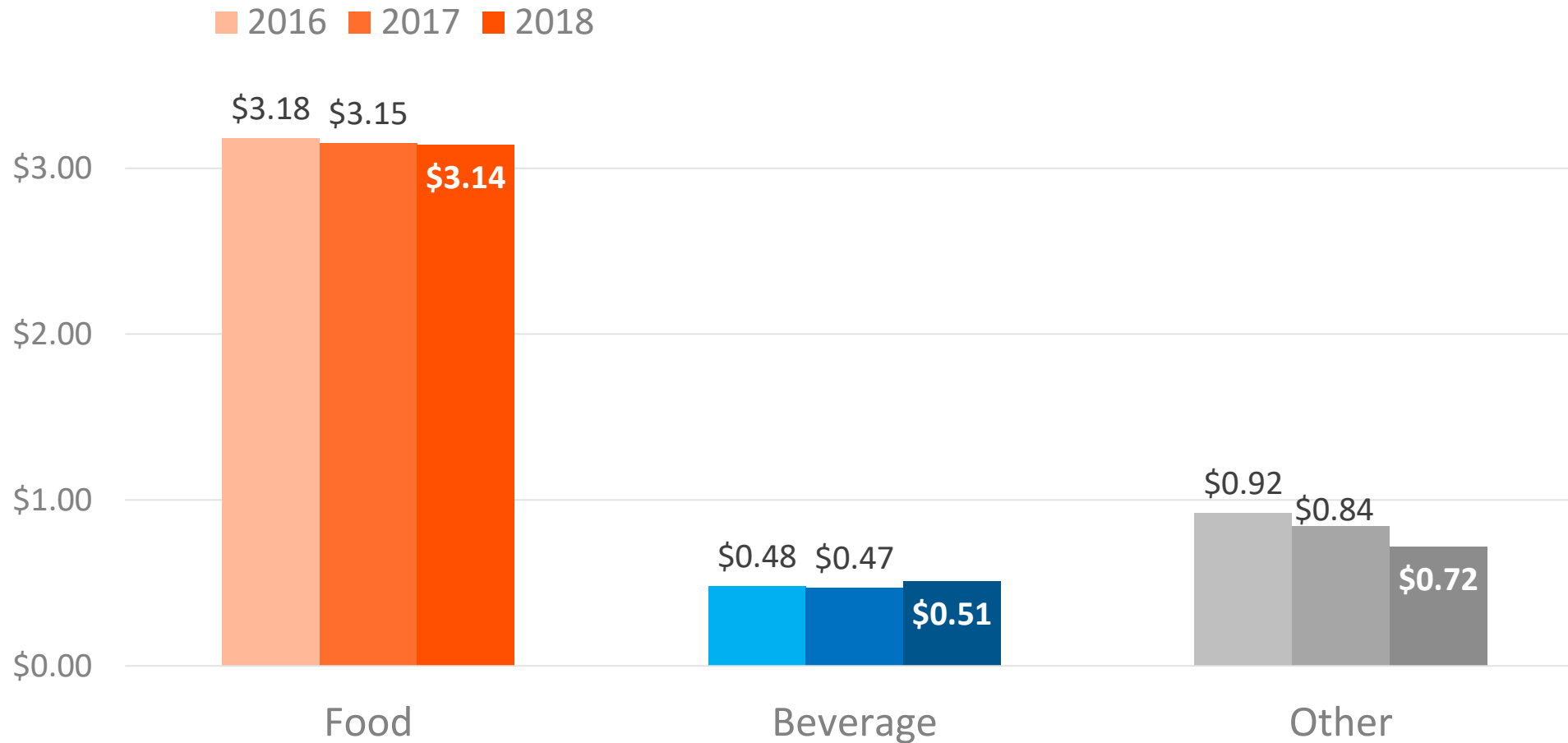


Appetites for *B&F* Continue to Grow Across Hotel Classes





Evolving Hotel F&B Trends Evidenced in In-Room Dining Revenue per Occupied Room





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