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Fayetteville Area CVB

For the Month of July 2015

Date Created: Aug 17, 2015

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Tab 2 - Multi-Segment

Currency: USD - US Dollar

Fayetteville Area CVB

For the month of: July 2015

	Current Month - July 2015 vs July 2014												Year to Date - July 2015 vs July 2014												Participation				
	Occ %		ADR		RevPAR		Percent Change from July 2014						Occ %		ADR		RevPAR		Percent Change from YTD 2014						Properties		Rooms		
	2015	2014	2015	2014	2015	2014	Occ	ADR	RevPAR	Room Rev	Room Avail	Room Sold	2015	2014	2015	2014	2015	2014	Occ	ADR	RevPAR	Room Rev	Room Avail	Room Sold	Census	Sample	Census	Sample	
North Carolina	70.8	68.6	98.15	94.50	69.46	64.83	3.2	3.9	7.1	8.0	0.8	4.0	63.9	61.7	94.08	90.18	60.09	55.63	3.5	4.3	8.0	8.5	0.4	4.0	1733	1094	149331	114345	
Cumberland County, NC	70.7	68.1	74.96	73.61	53.03	50.16	3.8	1.8	5.7	6.8	1.0	4.8	67.3	67.6	73.36	73.54	49.35	49.74	-0.5	-0.2	-0.8	0.2	1.0	0.4	63	43	5899	4570	
Johnston County, NC	52.0	48.8	70.17	69.88	36.50	34.07	6.7	0.4	7.2	7.1	-0.1	6.7	47.6	44.4	70.02	68.94	33.36	30.61	7.3	1.6	9.0	8.9	-0.1	7.2	26	17	1838	1218	
Robeson County, NC	70.5	66.3	68.30	64.57	48.15	42.84	6.3	5.8	12.4	12.2	-0.2	6.1	64.7	60.9	64.68	63.81	41.83	38.87	6.2	1.4	7.6	6.9	-0.6	5.5	28	15	1703	1072	
Wake County, NC	72.4	71.5	93.44	88.13	67.67	62.99	1.3	6.0	7.4	9.8	2.2	3.6	71.5	69.3	94.99	90.62	67.95	62.77	3.3	4.8	8.2	9.3	1.0	4.3	138	124	16207	14979	
Durham County, NC	66.6	70.4	93.61	86.50	62.33	60.92	-5.5	8.2	2.3	8.9	6.5	0.7	68.1	68.6	97.93	92.00	66.73	63.11	-0.7	6.4	5.7	9.7	3.7	3.0	63	56	8046	7387	
Edgecombe County, NC																													
Guilford County, NC	59.3	59.6	83.65	82.65	49.63	49.25	-0.4	1.2	0.8	0.9	0.1	-0.3	57.3	56.0	91.85	88.49	52.66	49.52	2.4	3.8	6.3	6.9	0.5	3.0	4	2	216	126	
Harnett County, NC	64.4	58.2	70.41	69.65	45.35	40.54	10.7	1.1	11.9	11.9	0.0	10.7	56.5	53.5	69.06	69.20	39.00	37.04	5.5	-0.2	5.3	5.3	0.0	5.5	93	73	10844	9345	
Moore County, NC	70.0	61.3	116.31	106.92	81.41	65.58	14.1	8.8	24.1	15.7	-6.8	6.4	58.9	59.3	117.29	123.38	69.13	73.11	-0.5	-4.9	-5.4	-11.1	-6.0	-6.5	10	7	771	550	

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Source 2015 STR, Inc.

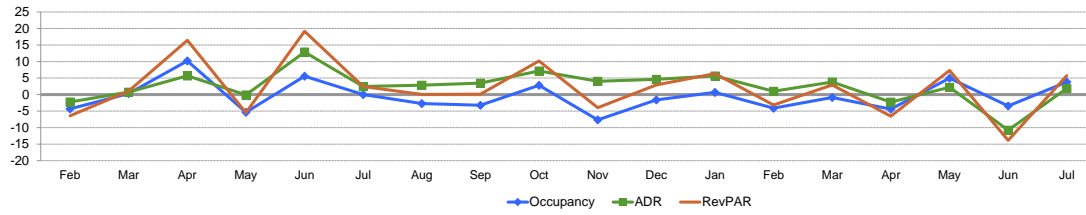
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Tab 3 - Trend Cumberland County NC

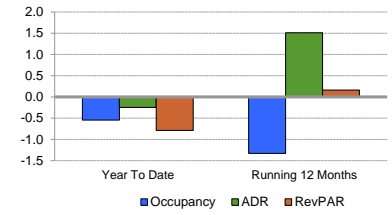
Currency: USD - US Dollar

Fayetteville Area CVB
For the Month of July 2015

Monthly Percent Change



Overall Percent Change



Occupancy (%)	2014												2015					
	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
This Year	66.5	68.7	74.4	63.8	73.5	68.1	66.3	58.6	61.0	57.2	55.6	59.1	63.7	68.2	71.1	67.0	71.0	70.7
Last Year	69.5	68.5	67.5	67.4	69.7	68.2	68.1	60.6	59.3	61.9	56.5	58.7	66.5	68.7	74.4	63.8	73.5	68.1
Percent Change	-4.3	0.3	10.2	-5.4	5.6	0.0	-2.7	-3.2	2.8	-7.7	-1.6	0.7	-4.1	-0.9	-4.4	5.0	-3.5	3.8

Year To Date			
2013	2014	2015	
67.4	67.6	67.3	
66.6	67.4	67.6	
1.2	0.4	-0.5	

Running 12 Months			
2013	2014	2015	
65.7	65.0	64.1	
64.5	65.7	65.0	
1.9	-1.2	-1.3	

ADR	2014												2015					
	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
This Year	71.31	71.07	74.52	71.44	81.57	73.61	75.80	74.89	75.69	76.07	70.57	73.91	72.04	73.78	72.83	73.02	72.78	74.96
Last Year	72.93	70.54	70.52	71.50	72.26	71.86	73.71	72.39	70.85	73.14	67.46	69.97	71.31	71.07	74.52	71.44	81.57	73.61
Percent Change	-2.2	0.7	5.7	-0.1	12.9	2.4	2.8	3.5	7.1	4.0	4.6	5.6	1.0	3.8	-2.3	2.2	-10.8	1.8

Year To Date			
2013	2014	2015	
71.52	73.54	73.36	
71.49	71.52	73.54	
0.0	2.8	-0.2	

Running 12 Months			
2013	2014	2015	
71.69	72.77	73.87	
71.12	71.69	72.77	
0.8	1.5	1.5	

RevPAR	2014												2015					
	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
This Year	47.41	48.86	55.44	45.56	59.99	50.16	50.24	43.92	46.16	43.51	39.25	43.65	45.92	50.28	51.81	48.89	51.68	53.03
Last Year	50.67	48.35	47.62	48.19	50.34	48.97	50.21	43.86	41.91	45.30	38.13	41.05	47.41	48.86	55.44	45.56	59.99	50.16
Percent Change	-6.4	1.1	16.4	-5.5	19.2	2.4	0.1	0.1	10.2	-4.0	2.9	6.3	-3.1	2.9	-6.6	7.3	-13.9	5.7

Year To Date			
2013	2014	2015	
48.18	49.74	49.35	
47.59	48.18	49.74	
1.3	3.2	-0.8	

Running 12 Months			
2013	2014	2015	
47.14	47.29	47.37	
45.88	47.14	47.29	
2.7	0.3	0.2	

Supply	2014												2015					
	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
This Year	163,548	181,071	175,230	181,071	175,230	181,071	179,676	173,880	183,117	177,210	182,869	182,869	165,172	182,869	176,970	182,869	176,970	182,869
Last Year	162,176	179,552	173,790	179,583	173,790	179,583	179,583	173,760	179,552	173,760	179,552	181,071	163,548	181,071	175,230	181,071	175,230	181,071
Percent Change	0.8	0.8	0.8	0.8	0.8	0.8	0.1	0.1	2.0	0.8	0.2	1.0	1.0	1.0	1.0	1.0	1.0	1.0

Year To Date			
2013	2014	2015	
1,228,026	1,238,292	1,250,588	
1,214,538	1,228,026	1,238,292	
1.1	0.8	1.0	

Running 12 Months			
2013	2014	2015	
2,114,846	2,124,499	2,147,340	
2,076,540	2,114,846	2,124,499	
3.8	0.5	1.1	

Demand	2014												2015					
	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
This Year	108,730	124,473	130,376	115,467	128,871	123,393	119,078	101,966	111,680	101,355	101,700	107,987	105,286	124,627	125,890	122,438	125,648	129,368
Last Year	112,691	123,057	117,347	121,021	121,077	122,386	122,313	105,276	106,503	107,625	101,488	106,217	108,730	124,473	130,376	115,467	128,871	123,393
Percent Change	-3.5	1.2	11.1	-4.6	6.4	0.8	-2.6	-3.1	4.9	-5.8	0.2	1.7	-3.2	0.1	-3.4	6.0	-2.5	4.8

Year To Date			
2013	2014	2015	
827,350	837,527	841,244	
808,369	827,350	837,527	
2.3	1.2	0.4	

Running 12 Months			
2013	2014	2015	
1,390,500	1,380,732	1,377,023	
1,339,554	1,390,500	1,380,732	
3.8	-0.7	-0.3	

Revenue	2014												2015					
	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
This Year	7,753,620	8,846,260	9,715,261	8,248,981	10,512,364	9,083,190	9,026,523	7,636,680	8,452,893	7,709,778	7,177,243	7,981,659	7,584,836	9,194,804	9,168,347	8,940,425	9,144,934	9,697,707
Last Year	8,218,221	8,680,660	8,275,057	8,653,381	8,749,330	8,794,788	9,016,129	7,621,069	7,524,257	7,871,403	6,846,270	7,432,078	7,753,620	8,846,260	9,715,261	8,248,981	10,512,364	9,083,190
Percent Change	-5.7	1.9	17.4	-4.7	20.2	3.3	0.1	0.2	12.3	-2.1	4.8	7.4	-2.2	3.9	-5.6	8.4	-13.0	6.8

Year To Date			
2013	2014	2015	
59,168,571	61,591,754	61,712,712	
57,793,965	59,168,571	61,591,754	
2.4	4.1	0.2	

Running 12 Months			
2013	2014	2015	
99,686,954	100,470,882	101,715,829	
95,263,498	99,686,954	100,470,882	
4.6	0.8	1.2	

Census %	2014												2015					
	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
Census Props	63	63	63	63	63	63	62	62	63	63	63	63	63	63	63	63	63	63
Census Rooms	5841	5841	5841	5841	5841	5841	5796	5796	5907	5907	5899	5899	5899	5899	5899	5899	5899	5899
% Rooms Participants	78.7	79.5	81.6	81.6	81.6	81.6	82.2	80.1	80.5	82.5	82.5	82.5	82.5	82.5	82.5	82.5	82.5	77.5

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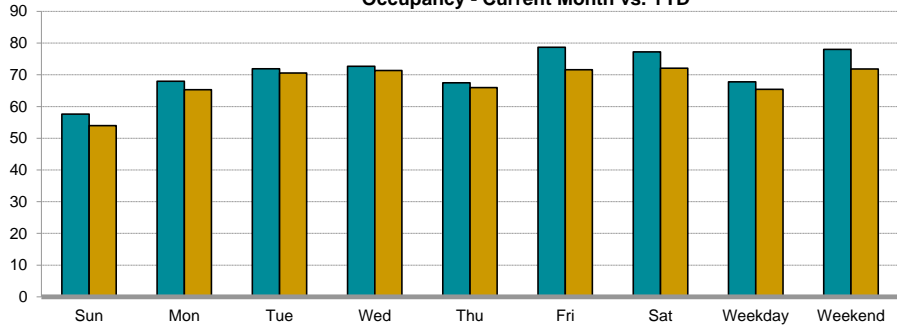
Tab 5 - DOW Cumberland County NC

Currency: USD - US Dollar

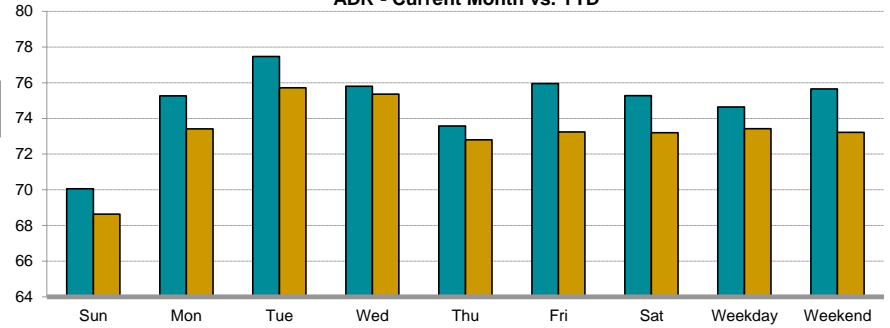
Fayetteville Area CVB

For the Month of July 2015

Occupancy - Current Month vs. YTD



ADR - Current Month vs. YTD



Day of Week		Occupancy (%)		ADR		RevPAR		Supply		Demand		Revenue	
		% Chg	% Chg	% Chg	% Chg	% Chg	% Chg	% Chg	% Chg				
Sunday	Current Month	57.6	3.8	70.05	0.4	40.37	4.3	23,596	1.0	13,597	4.9	952,549	5.3
	Year To Date	54.0	-3.5	68.63	-1.1	37.06	-4.6	176,970	1.0	95,552	-2.6	6,558,099	-3.7
	Running 12 Month	51.7	-3.4	69.52	1.2	35.97	-2.2	305,893	1.1	158,294	-2.3	11,003,884	-1.2
Monday	Current Month	68.0	1.9	75.27	2.4	51.15	4.3	23,596	1.0	16,036	2.9	1,206,999	5.4
	Year To Date	65.3	-1.2	73.42	0.7	47.92	-0.5	176,970	1.0	115,522	-0.2	8,481,240	0.5
	Running 12 Month	62.3	-1.6	73.98	2.1	46.10	0.4	305,885	1.1	190,620	-0.6	14,102,124	1.5
Tuesday	Current Month	71.9	5.6	77.47	3.9	55.72	9.6	23,596	-19.2	16,972	-14.7	1,314,868	-11.4
	Year To Date	70.6	0.5	75.72	0.8	53.43	1.3	176,970	1.0	124,872	1.5	9,455,158	2.3
	Running 12 Month	66.6	-0.9	76.05	2.0	50.66	1.0	305,885	1.1	203,764	0.1	15,495,383	2.1
Wednesday	Current Month	72.7	7.2	75.81	2.9	55.10	10.3	29,495	1.0	21,440	8.3	1,625,320	11.4
	Year To Date	71.4	1.4	75.36	0.2	53.77	1.5	176,970	-2.3	126,279	-0.9	9,516,365	-0.8
	Running 12 Month	67.2	-1.2	75.81	1.4	50.91	0.2	305,996	1.1	205,492	-0.2	15,578,122	1.3
Thursday	Current Month	67.5	2.6	73.58	2.8	49.66	5.4	29,495	1.0	19,906	3.6	1,464,654	6.5
	Year To Date	65.9	-2.4	72.80	-0.7	48.01	-3.1	182,869	1.0	120,585	-1.4	8,779,083	-2.1
	Running 12 Month	63.3	-2.7	73.55	1.2	46.59	-1.5	305,996	-0.8	193,826	-3.5	14,256,634	-2.3
Friday	Current Month	78.7	2.6	75.95	1.3	59.74	3.9	29,495	26.2	23,200	29.5	1,762,025	31.1
	Year To Date	71.6	0.3	73.24	-0.5	52.42	-0.2	182,869	4.4	130,891	4.7	9,586,196	4.2
	Running 12 Month	68.4	-0.1	73.60	1.6	50.36	1.4	311,792	3.0	213,337	2.9	15,702,242	4.5
Saturday	Current Month	77.2	0.2	75.28	-1.1	58.12	-1.0	23,596	1.0	18,216	1.1	1,371,291	0.0
	Year To Date	72.1	0.4	73.20	-1.4	52.76	-1.0	176,970	1.0	127,544	1.3	9,336,572	0.0
	Running 12 Month	69.2	0.0	73.59	1.0	50.92	0.9	305,893	1.1	211,691	1.0	15,577,442	2.0
Weekday / Weekend													
Weekday (Sun-Thu)	Current Month	67.8	4.1	74.64	2.5	50.58	6.7	129,778	-3.4	87,952	0.6	6,564,391	3.1
	Year To Date	65.4	-1.0	73.42	0.0	48.04	-0.9	890,749	0.3	582,810	-0.6	42,789,943	-0.6
	Running 12 Month	62.2	-1.9	73.99	1.6	46.05	-0.3	1,529,655	0.7	951,995	-1.2	70,436,146	0.4
Weekend (Fri-Sat)	Current Month	78.0	1.5	75.65	0.1	59.02	1.6	53,091	13.6	41,416	15.3	3,133,316	15.4
	Year To Date	71.8	0.3	73.22	-0.9	52.59	-0.6	359,839	2.7	258,434	3.0	18,922,769	2.1
	Running 12 Month	68.8	-0.1	73.59	1.3	50.64	1.2	617,685	2.0	425,028	2.0	31,279,683	3.2
Total	Current Month	70.7	3.8	74.96	1.8	53.03	5.7	182,869	1.0	129,368	4.8	9,697,707	6.8
	Year To Date	67.3	-0.5	73.36	-0.2	49.35	-0.8	1,250,588	1.0	841,244	0.4	61,712,712	0.2
	Running 12 Month	64.1	-1.3	73.87	1.5	47.37	0.2	2,147,340	1.1	1,377,023	-0.3	101,715,829	1.2

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Source 2015 STR, Inc.

Tab 6 - Seg Trend Cumberland County NC

Fayetteville Area CVB

For the Month of July 2015

Currency: USD - US Dollar

Current Month	This Year												Percent Change (%)											
	Occupancy (%)				ADR				RevPAR				Occupancy (%)				ADR (%)				RevPAR (%)			
	Trans.	Grp.	Con.	Total	Trans.	Grp.	Con.	Total	Trans.	Grp.	Con.	Total	Trans.	Grp.	Con.	Total	Trans.	Grp.	Con.	Total	Trans.	Grp.	Con.	Total
2014 Feb				66.5				71.31				47.41				-4.3				-2.2				-6.4
Mar				68.7				71.07				48.86				0.3				0.7				1.1
Apr				74.4				74.52				55.44				10.2				5.7				16.4
May				63.8				71.44				45.56				-5.4				-0.1				-5.5
Jun				73.5				81.57				59.99				5.6				12.9				19.2
Jul				68.1				73.61				50.16				0.0				2.4				2.4
Aug				66.3				75.80				50.24				-2.7				2.8				0.1
Sep				58.6				74.89				43.92				-3.2				3.5				0.1
Oct				61.0				75.69				46.16				2.8				7.1				10.2
Nov				57.2				76.07				43.51				-7.7				4.0				-4.0
Dec				55.6				70.57				39.25				-1.6				4.6				2.9
2015 Jan				59.1				73.91				43.65				0.7				5.6				6.3
Feb				63.7				72.04				45.92				-4.1				1.0				-3.1
Mar				68.2				73.78				50.28				-0.9				3.8				2.9
Apr				71.1				72.83				51.81				-4.4				-2.3				-6.6
May				67.0				73.02				48.89				5.0				2.2				7.3
Jun				71.0				72.78				51.68				-3.5				-10.8				-13.9
Jul				70.7				74.96				53.03				3.8				1.8				5.7

Year To Date												Percent Change (%)												
2013 Jul				67.4				71.52				48.18				1.2				0.0				1.3
2014 Jul				67.6				73.54				49.74				0.4				2.8				3.2
2015 Jul				67.3				73.36				49.35				-0.5				-0.2				-0.8

Running 12 Month												Percent Change (%)												
2013 Jul				65.7				71.69				47.14				1.9				0.8				2.7
2014 Jul				65.0				72.77				47.29				-1.2				1.5				0.3
2015 Jul				64.1				73.87				47.37				-1.3				1.5				0.2

A blank row indicates insufficient data.

Source 2015 STR, Inc.

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Tab 8 - Help

All data is processed by STR using both the current and historical sampling of hotels.
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Average Daily Rate (ADR)

Room revenue divided by rooms sold, displayed as the average rental rate for a single room.

Census (properties and rooms)

The number of properties and rooms that exist in our database for the area(s) or segment(s) shown on the report.

Country

A geographic area that has internationally recognized boundaries, an organized economy, and a sovereign government with external recognition.
It is typically recognized by the International Organization for Standardization (ISO).

Custom Segments

Defined by a + at the end of the segment name. If a custom segment is based on a selected group of properties, new properties that come into the area will NOT automatically be added to this segment.
The new property can be added alone as long as it has no more than five months of data. Once the property has six or more months of data it is considered an established property, requiring a two property change (add one/drop one or add two).

Demand (Rooms Sold)

The number of rooms sold or rented (excludes complimentary rooms).

Exchange Rate

The factor used to convert revenue from U.S. Dollars to the local currency. The exchange rate data is obtained from Oanda.com.
Any aggregated number in the report (YTD, Running 3 month, Running 12 month) uses the exchange rate of each relative month when calculating the data.

Index

Index (Occupancy, ADR, RevPar) - Property performance divided by competitive set performance multiplied by 100.
Internationally, indexes are also referred to as MPI – Market Penetration Index (Occupancy Index), ARI – Average Rate Index (ADR Index), and RGI – Revenue/RevPAR Generation Index (RevPAR Index).

Market

A geographic area within a country. Markets are defined by STR and STR Global.

Occupancy (Occ)

Rooms sold divided by rooms available multiplied by 100. Occupancy is always expressed as a percentage of rooms occupied.

Percent Change

Amount of growth - up, flat, or down - this period versus same period last year (month or year-to-date). Calculated as $((TY - LY) / LY) * 100$.

Revenue (Room Revenue)

Total room revenue generated from the sale or rental of rooms.

RevPAR (Revenue Per Available Room)

Room revenue divided by rooms available.

Sample or % Room Participants

The percent of rooms from which STR receives data. Calculated as $(\text{Sample Rooms} / \text{Census Rooms}) * 100$

Sub-Market

A geographic sub-area within a Market. Sub-markets are defined by STR and STR Global.

Supply (Rooms Available)

The number of rooms times the number of days in the period.

Twelve Month Moving Average

Measures (Occ, ADR, RevPAR, Supply, Demand, Revenue) are calculated using the sum of the values of the given month and of the preceding eleven months.

WD (Weekday)

Average of Sunday through Thursday

WE (Weekend)

Average of Friday and Saturday

Year-to-date

Measures (Occ, ADR, RevPAR, Supply, Demand, Revenue) are calculated using the sum of the values from January 1 of the given year.