

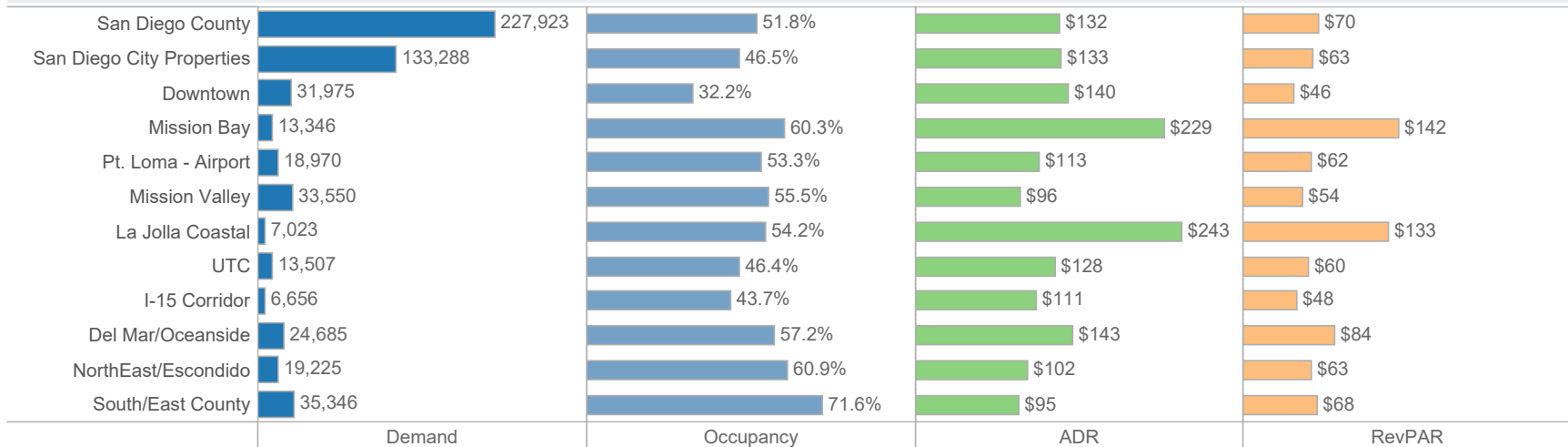


Weekly Hotel Performance Update - Week of August 9 - 15, 2020

source: STR, Inc.

Hotel supply is just about back pre-COVID levels. Supply was 62,684 rooms open last week, 99% of pre-COVID supply of 63,386...

San Diego County Hotel Performance - Week of Aug 9-15, 2020



Weekly Top 25 Room Demand Aug 9-15, 2020	
Los Angeles/Long ..	355,189
Atlanta	354,575
Chicago	293,920
Dallas	269,456
New York	258,399
Houston	257,341
Washington	249,924
San Diego	227,923
Orlando	219,860
Phoenix	200,414
Denver	175,948
Philadelphia	171,728
Tampa/St Petersb..	167,760
Norfolk/Virginia Be..	165,801
Detroit	160,396
Anaheim/Santa Ana	156,776
Nashville	132,073
Miami/Hialeah	125,616
Boston	120,664
Seattle	119,542
Minneapolis/St Paul	119,063
St Louis	114,586
San Francisco	109,456
New Orleans	93,108
Oahu Island	28,036

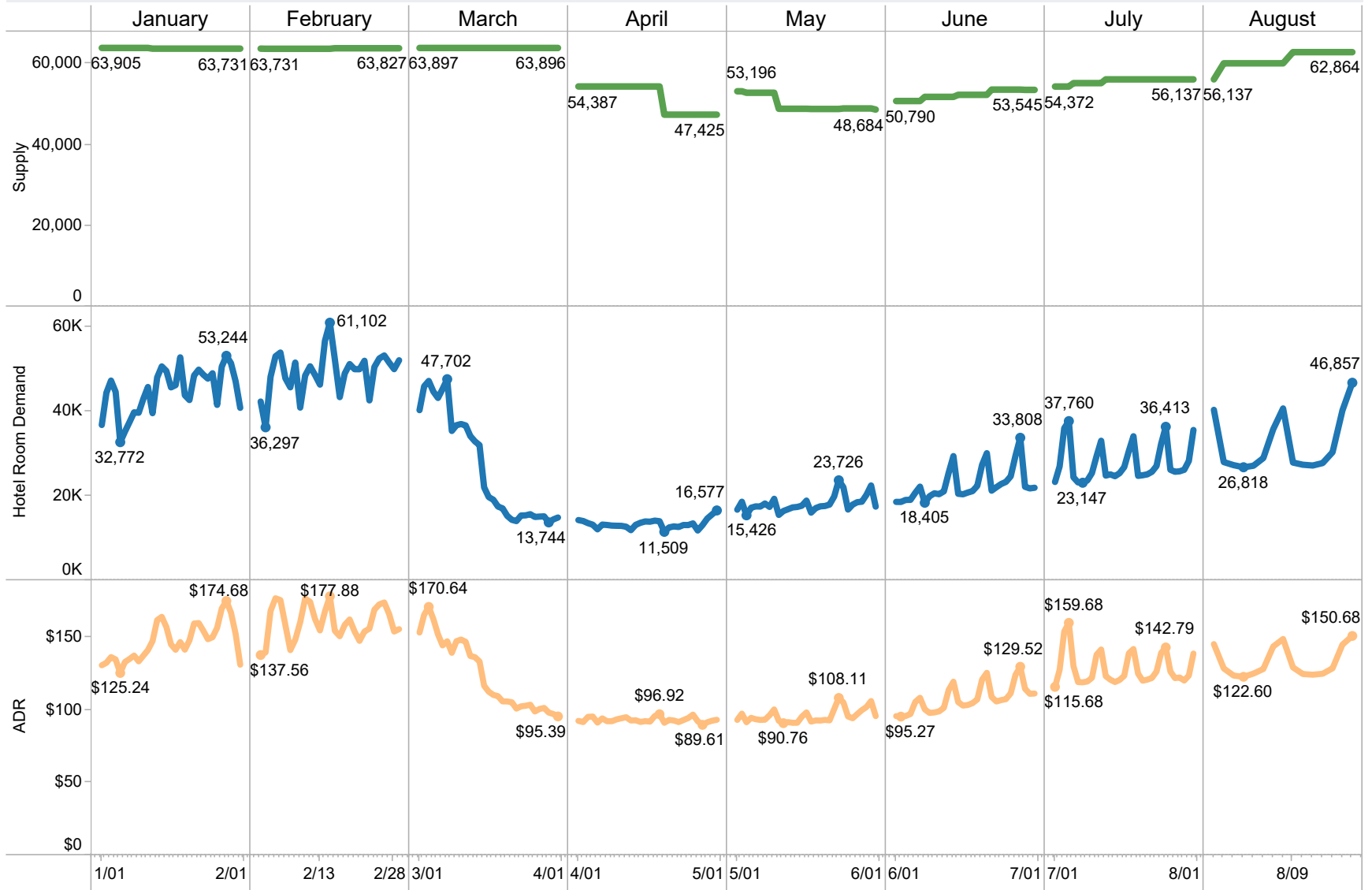
Weekly Top 25 Hotel Occupancy Aug 9-15, 2020	
Norfolk/Virginia Be..	65%
Philadelphia	53%
San Diego	52%
Detroit	52%
Los Angeles/Long ..	51%
Atlanta	49%
Tampa/St Petersb..	49%
Denver	48%
Phoenix	44%
Anaheim/Santa Ana	43%
St Louis	41%
Dallas	41%
New York	41%
San Francisco	41%
Chicago	40%
Houston	39%
Nashville	38%
Seattle	37%
Minneapolis/St Paul	37%
Miami/Hialeah	37%
Washington	36%
New Orleans	35%
Boston	33%
Orlando	30%
Oahu Island	23%

Weekly Top 25 ADR Aug 9-15, 2020	
Oahu Island	\$166
Anaheim/Santa Ana	\$135
San Diego	\$135
New York	\$134
Los Angeles/Long ..	\$128
San Francisco	\$121
Norfolk/Virginia Be..	\$113
Boston	\$112
Miami/Hialeah	\$110
Tampa/St Petersb..	\$101
Philadelphia	\$101
Seattle	\$95
Washington	\$95
Denver	\$91
Nashville	\$88
New Orleans	\$88
Chicago	\$87
Detroit	\$84
St Louis	\$83
Phoenix	\$83
Minneapolis/St Paul	\$83
Atlanta	\$81
Orlando	\$80
Dallas	\$75
Houston	\$72



San Diego County Demand and Average Rate Daily Trend
 January 1, 2020 through August 15, 2020
 Source: STR, inc

Daily County Demand and ADR Trend (Label indicates High and Low by Month)





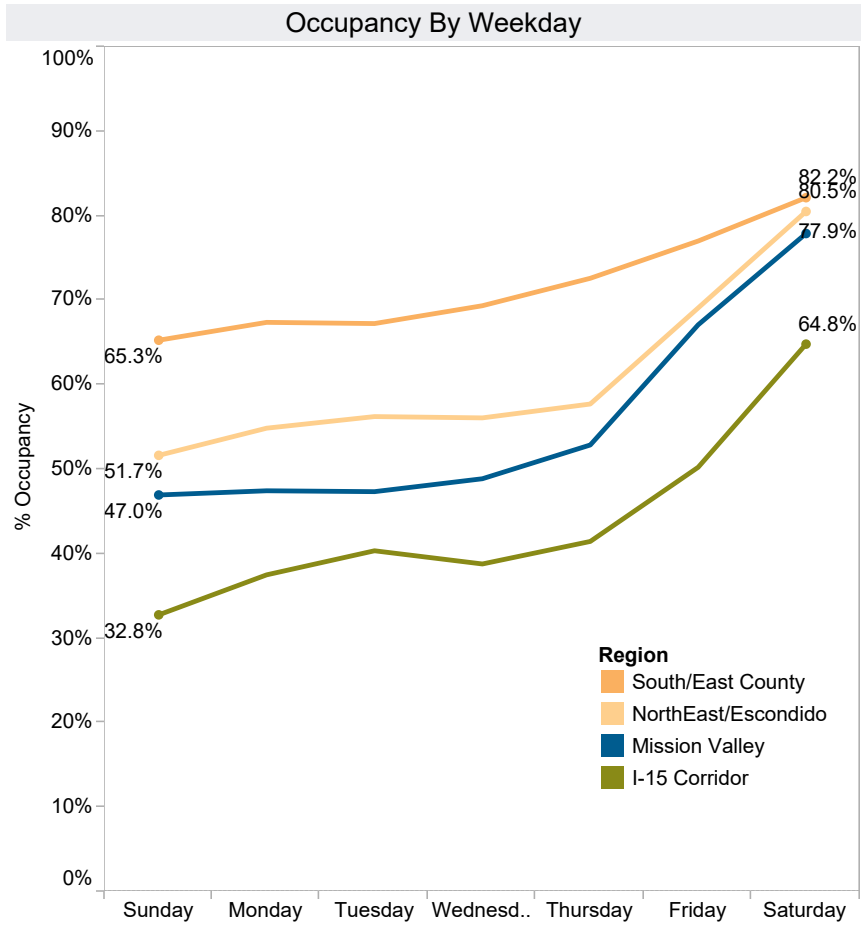
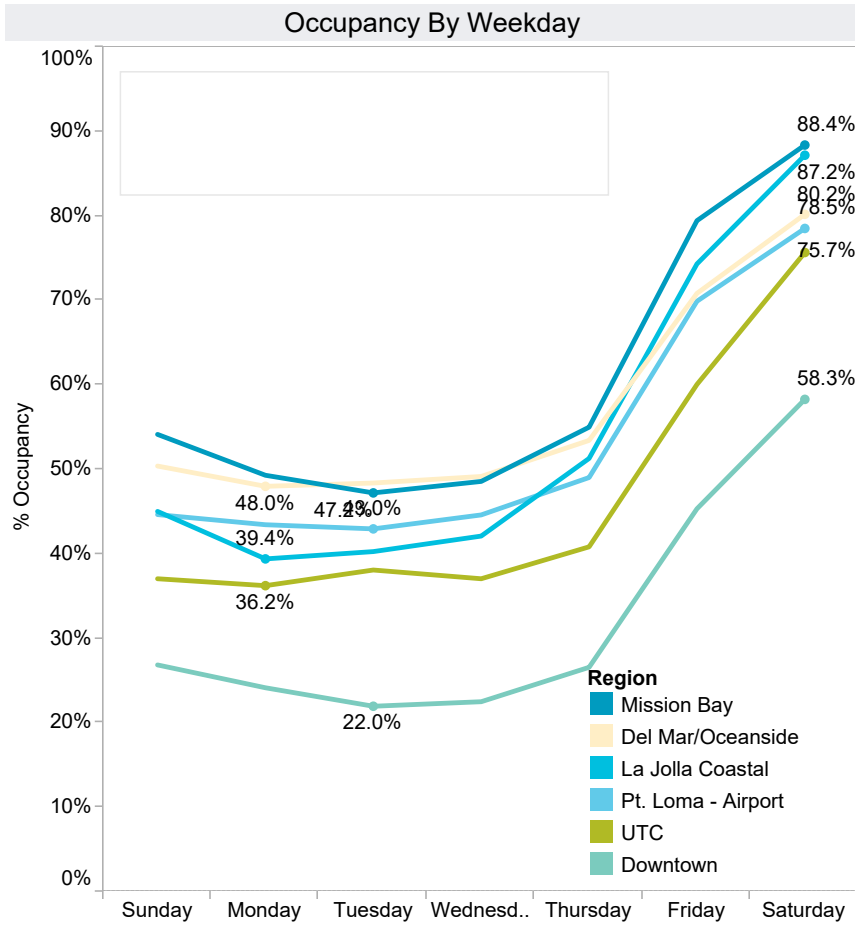
Last Week's Daily Hotel Performance by Region
 Source: STR, Inc.

		Sun, August 09	Mon, August 10	Tue, August 11	Wed, August 12	Thu, August 13	Fri, August 14	Sat, August 15
San Diego City Properties	Demand	16,023	15,433	15,185	15,487	17,291	24,587	29,282
	% Occupancy	39.2%	37.7%	37.1%	37.8%	42.3%	60.1%	71.6%
	ADR	\$129.67	\$126.17	\$123.90	\$126.17	\$129.47	\$145.89	\$151.21
	RevPAR	\$50.78	\$47.59	\$45.98	\$47.76	\$54.71	\$87.67	\$108.21
Downtown	Demand	3,805	3,422	3,112	3,188	3,765	6,424	8,259
	% Occupancy	26.9%	24.2%	22.0%	22.5%	26.6%	45.3%	58.3%
	ADR	\$138.65	\$135.69	\$133.16	\$132.68	\$135.20	\$147.79	\$156.72
	RevPAR	\$37.23	\$32.77	\$29.25	\$29.85	\$35.93	\$67.00	\$91.35
Mission Valley	Demand	4,055	4,098	4,089	4,221	4,566	5,794	6,727
	% Occupancy	47.0%	47.5%	47.4%	48.9%	52.9%	67.1%	77.9%
	ADR	\$90.75	\$91.77	\$90.33	\$95.47	\$91.37	\$102.47	\$108.43
	RevPAR	\$42.62	\$43.56	\$42.79	\$46.68	\$48.33	\$68.77	\$84.49
Pt. Loma - Airport	Demand	2,270	2,209	2,184	2,268	2,493	3,554	3,992
	% Occupancy	44.6%	43.5%	43.0%	44.6%	49.0%	69.9%	78.5%
	ADR	\$110.40	\$105.44	\$104.67	\$104.49	\$109.86	\$126.60	\$132.04
	RevPAR	\$49.29	\$45.82	\$44.96	\$46.61	\$53.87	\$88.50	\$103.68
Mission Bay	Demand	1,712	1,559	1,493	1,536	1,739	2,512	2,795
	% Occupancy	54.1%	49.3%	47.2%	48.6%	55.0%	79.4%	88.4%
	ADR	\$220.28	\$210.90	\$202.49	\$204.72	\$222.29	\$265.84	\$273.09
	RevPAR	\$119.27	\$103.98	\$95.61	\$99.45	\$122.25	\$211.19	\$241.40
La Jolla Coastal	Demand	833	729	745	779	949	1,375	1,613
	% Occupancy	45.0%	39.4%	40.3%	42.1%	51.3%	74.3%	87.2%
	ADR	\$231.53	\$234.22	\$239.10	\$241.66	\$245.82	\$257.47	\$254.27
	RevPAR	\$104.25	\$92.29	\$96.28	\$101.76	\$126.10	\$191.36	\$221.70
UTC	Demand	1,540	1,506	1,583	1,540	1,697	2,496	3,145
	% Occupancy	37.1%	36.2%	38.1%	37.1%	40.8%	60.1%	75.7%
	ADR	\$122.92	\$125.99	\$122.73	\$127.74	\$128.10	\$131.54	\$133.84
	RevPAR	\$45.55	\$45.65	\$46.75	\$47.33	\$52.31	\$79.00	\$101.28
I-15 Corridor	Demand	713	816	878	844	902	1,093	1,410
	% Occupancy	32.8%	37.5%	40.4%	38.8%	41.5%	50.3%	64.8%
	ADR	\$110.12	\$109.84	\$111.17	\$111.09	\$109.16	\$110.88	\$112.66
	RevPAR	\$36.10	\$41.21	\$44.88	\$43.11	\$45.27	\$55.72	\$73.04
Del Mar/Oceanside	Demand	3,107	2,959	2,983	3,031	3,294	4,367	4,944
	% Occupancy	50.4%	48.0%	48.4%	49.2%	53.4%	70.8%	80.2%
	ADR	\$140.27	\$130.60	\$133.40	\$128.76	\$139.33	\$165.63	\$166.49
	RevPAR	\$70.69	\$62.68	\$64.55	\$63.30	\$74.44	\$117.33	\$133.52
South/East County	Demand	4,605	4,754	4,744	4,893	5,122	5,433	5,795
	% Occupancy	65.3%	67.4%	67.3%	69.4%	72.6%	77.0%	82.2%
	ADR	\$92.57	\$92.33	\$93.22	\$93.02	\$93.01	\$97.35	\$101.21
	RevPAR	\$60.44	\$62.23	\$62.70	\$64.53	\$67.54	\$74.99	\$83.15
NorthEast/Escondido	Demand	2,330	2,475	2,537	2,530	2,604	3,117	3,632
	% Occupancy	51.7%	54.9%	56.3%	56.1%	57.7%	69.1%	80.5%
	ADR	\$99.18	\$96.28	\$98.67	\$97.16	\$97.57	\$109.32	\$115.94
	RevPAR	\$51.24	\$52.84	\$55.50	\$54.51	\$56.33	\$75.56	\$93.37



Day of Week Occupancy Patterns By Region

Week of August 9 - 15, 2020
min and max occupancy for week noted





STR Latest Weekly Performance Trend

Competitive Set Group and Transient

Selected Year
2020

Competitive Set Total Market Weekly

Competitive Set Group and Transient Weekly

		Total Market				Group				Transient			
		Week 30	Week 31	Week 32	Week 33	Week 30	Week 31	Week 32	Week 33	Week 30	Week 31	Week 32	Week 33
		Jul 19-25, 2020	Jul 26 - Aug 1, 2020	Aug 2-8, 2020	Aug 9-15, 2020	Jul 19-25, 2020	Jul 26 - Aug 1, 2020	Aug 2-8, 2020	Aug 9-15, 2020	Jul 19-25, 2020	Jul 26 - Aug 1, 2020	Aug 2-8, 2020	Aug 9-15, 2020
% Occupancy	San Diego	50.0%	53.1%	51.1%	51.8%	1.4%	1.2%	1.2%	1.1%	33.7%	38.0%	34.6%	35.9%
	Anaheim/Santa ..	40.3%	41.9%	41.5%	43.4%	1.6%	2.3%	2.1%	2.5%	27.6%	30.4%	31.1%	32.8%
	Los Angeles/Lo..	46.3%	48.3%	49.0%	50.8%	1.6%	1.6%	1.5%	1.4%	24.9%	26.4%	27.5%	30.3%
	San Francisco	37.9%	40.4%	43.1%	41.1%	4.3%	7.2%	10.3%	4.2%	15.8%	16.4%	19.3%	21.0%
	Seattle	35.1%	37.0%	37.5%	36.9%	0.7%	1.3%	1.9%	1.1%	12.0%	13.3%	13.8%	14.5%
	Phoenix	42.2%	44.7%	43.6%	44.3%	1.2%	1.2%	1.7%	2.1%	17.7%	19.4%	19.2%	21.2%
Occupancy YOY	San Diego	-43.9%	-38.9%	-40.3%	-37.6%	-94.9%	-95.0%	-95.0%	-95.8%	-42.9%	-39.4%	-44.3%	-39.8%
	Anaheim/Santa ..	-56.0%	-51.8%	-52.8%	-46.4%	-93.5%	-87.7%	-91.1%	-89.4%	-58.1%	-54.8%	-50.2%	-45.6%
	Los Angeles/Lo..	-47.7%	-45.6%	-43.6%	-39.8%	-88.8%	-91.2%	-89.1%	-88.0%	-63.8%	-60.2%	-60.2%	-56.8%
	San Francisco	-57.9%	-53.2%	-52.7%	-54.2%	-61.9%	-30.7%	-42.7%	-73.1%	-78.4%	-76.4%	-71.1%	-69.5%
	Seattle	-61.6%	-56.4%	-55.9%	-56.7%	-96.4%	-92.1%	-87.3%	-94.4%	-82.7%	-79.9%	-80.0%	-77.5%
	Phoenix	-33.6%	-24.0%	-34.4%	-29.5%	-94.6%	-92.0%	-93.5%	-90.2%	-55.9%	-45.5%	-45.2%	-43.0%
ADR	San Diego	\$129.14	\$129.78	\$132.86	\$134.51	\$138.73	\$146.78	\$206.88	\$177.57	\$220.88	\$220.04	\$222.94	\$226.46
	Anaheim/Santa ..	\$128.18	\$134.67	\$135.02	\$135.34	\$202.23	\$213.65	\$186.78	\$205.24	\$285.49	\$308.18	\$297.79	\$294.47
	Los Angeles/Lo..	\$123.63	\$123.01	\$127.26	\$127.81	\$142.63	\$129.47	\$142.31	\$147.84	\$204.64	\$198.92	\$208.50	\$203.13
	San Francisco	\$118.47	\$121.42	\$127.84	\$121.22	\$100.48	\$155.83	\$188.83	\$136.18	\$177.45	\$177.43	\$178.31	\$175.22
	Seattle	\$95.38	\$95.71	\$96.56	\$95.40	\$126.88	\$174.72	\$156.18	\$163.88	\$167.60	\$165.41	\$169.12	\$161.27
	Phoenix	\$80.55	\$81.64	\$81.58	\$83.09	\$102.10	\$115.24	\$116.46	\$91.97	\$138.02	\$140.84	\$143.24	\$148.10
ADR YOY	San Diego	-36.8%	-33.1%	-28.6%	-24.2%	-44.6%	-42.0%	-15.1%	-24.8%	-23.0%	-18.1%	-14.5%	-10.1%
	Anaheim/Santa ..	-33.9%	-28.3%	-30.9%	-22.8%	-11.5%	-11.7%	-20.1%	-2.6%	-8.6%	2.3%	-9.5%	-1.4%
	Los Angeles/Lo..	-37.4%	-38.3%	-35.5%	-34.7%	-45.7%	-45.2%	-41.8%	-42.7%	-28.5%	-33.5%	-28.9%	-28.8%
	San Francisco	-50.8%	-46.4%	-49.7%	-49.5%	-63.5%	-43.4%	-33.7%	-49.7%	-36.9%	-31.8%	-41.3%	-38.1%
	Seattle	-52.6%	-49.7%	-48.9%	-50.8%	-47.1%	-25.0%	-37.0%	-34.0%	-39.0%	-35.0%	-32.1%	-39.0%
	Phoenix	-10.5%	-5.5%	-8.6%	-6.6%	-10.6%	-2.6%	-1.5%	-22.1%	0.8%	6.3%	4.5%	11.1%

Source: Smith Travel Research, Inc.

Notes: The group and transient data only represents upscale chain properties. Contact Susan Bruinzeel at sbruinzeel@sandiego.org with any questions.