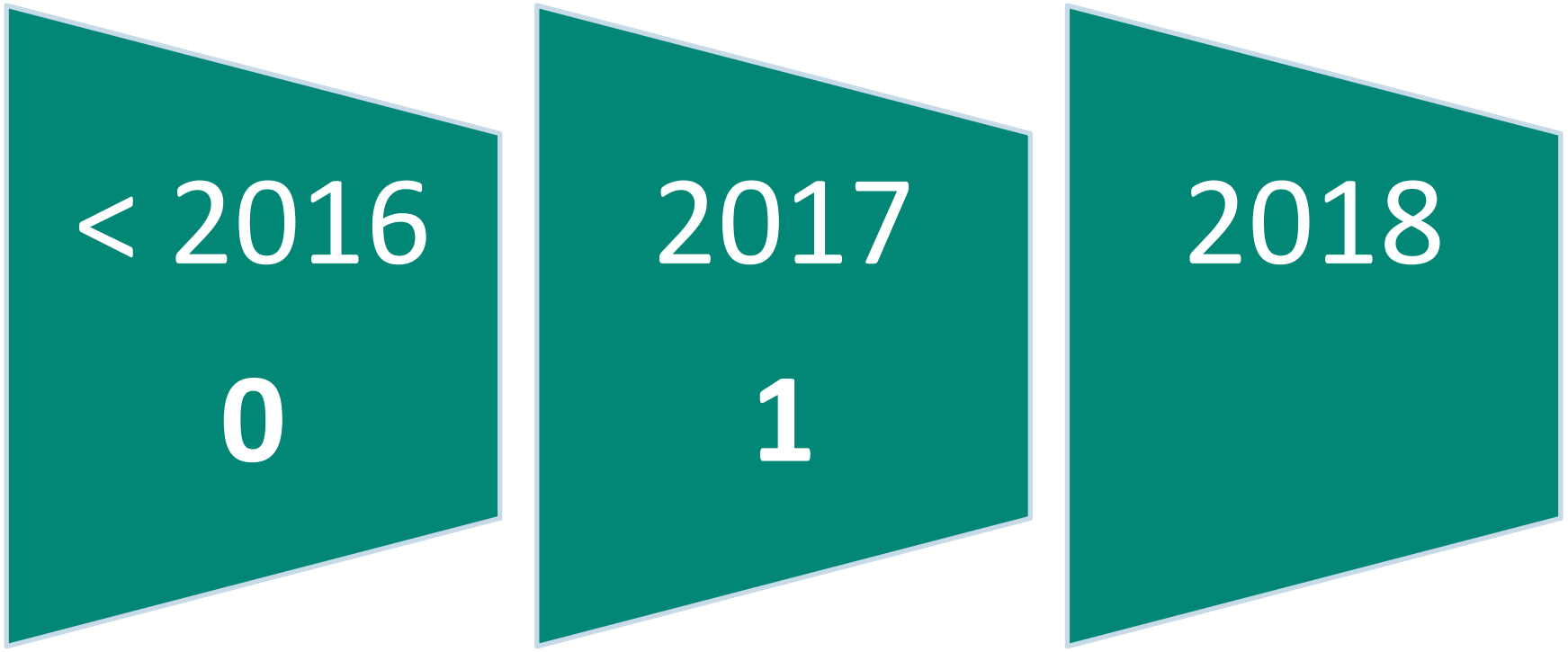


Nashville Hotel Performance

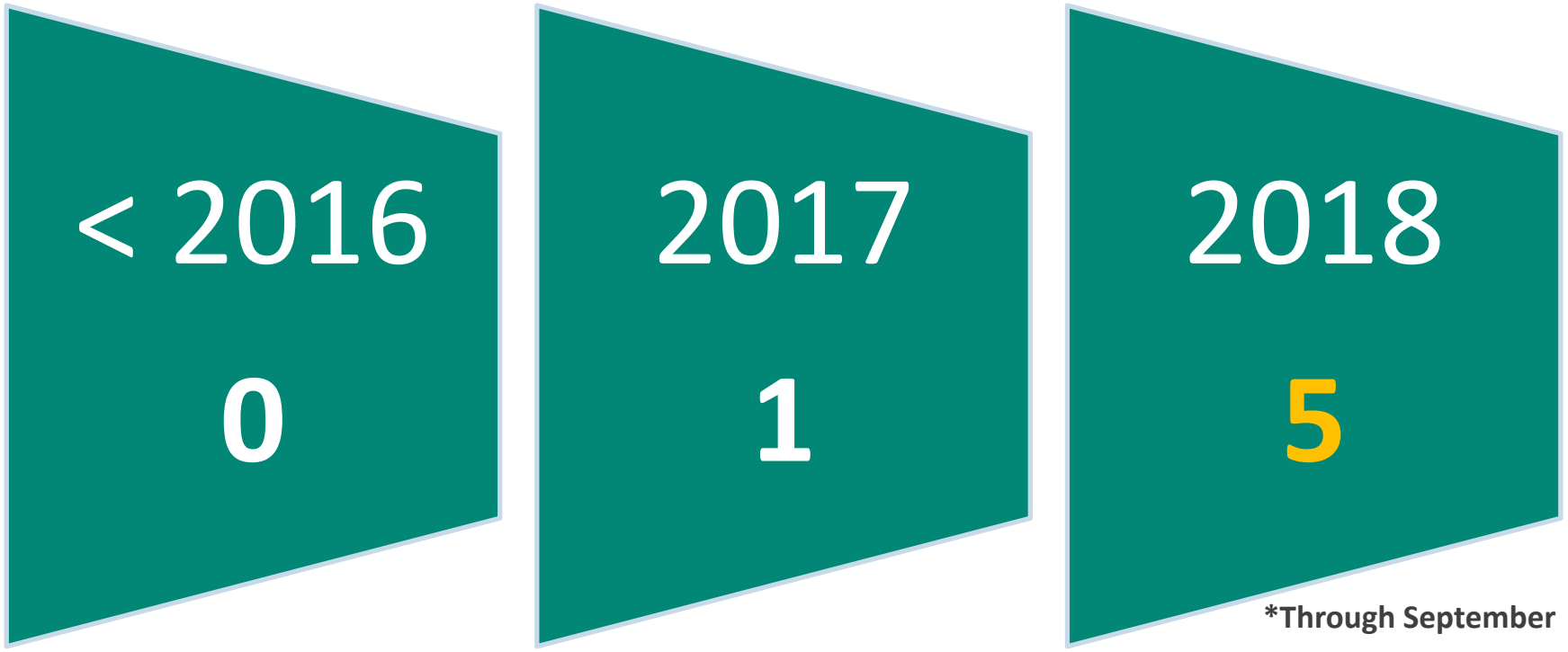
Jan D. Freitag
Senior Vice President
jan@str.com

Number of Months With 1 Million + Room Nights Sold



© 2018 STR. All Rights Reserved.

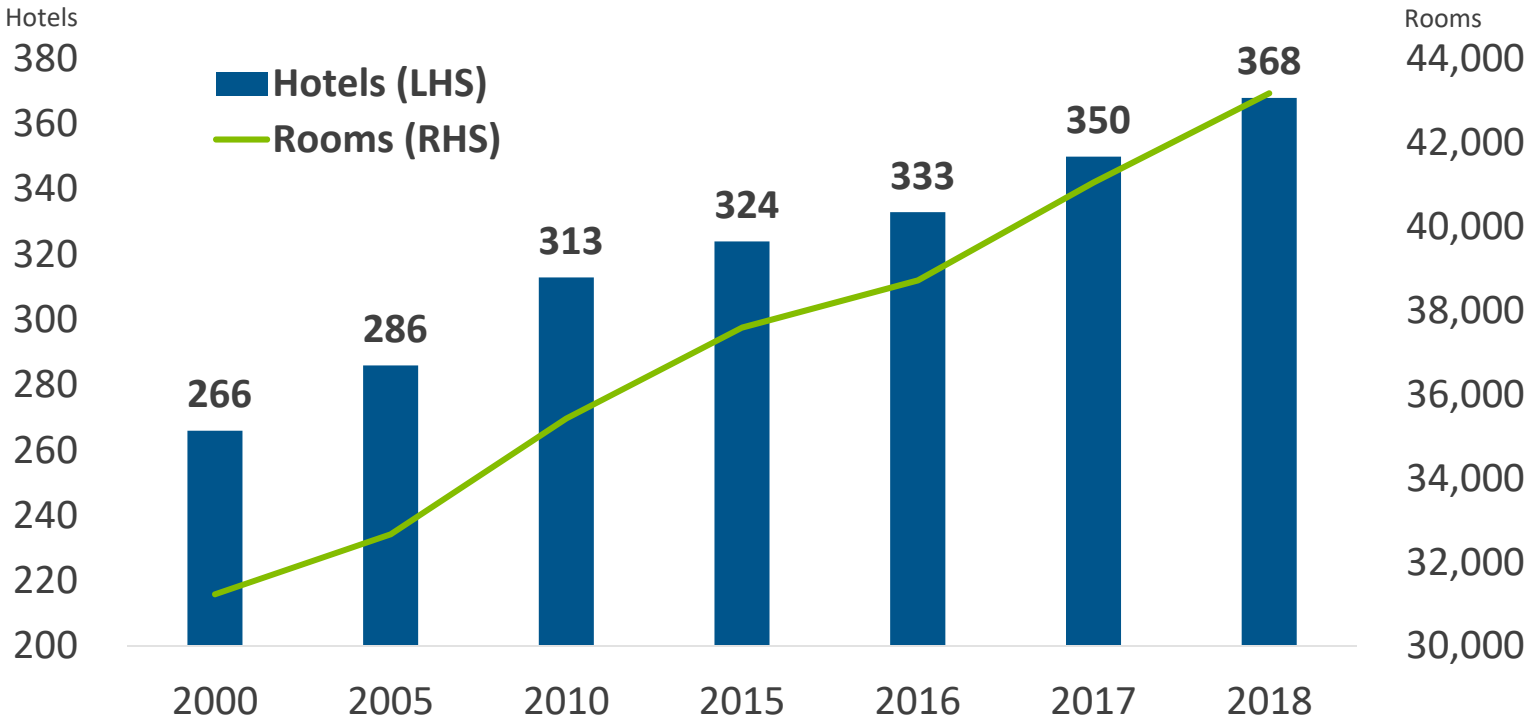
Number of Months With 1 Million + Room Nights Sold



*Through September

© 2018 STR. All Rights Reserved.

Nashville Today: 368 Hotels with ~43,000 Rooms (And Growing)



Nashville, TN, Hotels and Rooms, by year, 2000 – September 2018

© 2018 STR. All Rights Reserved.

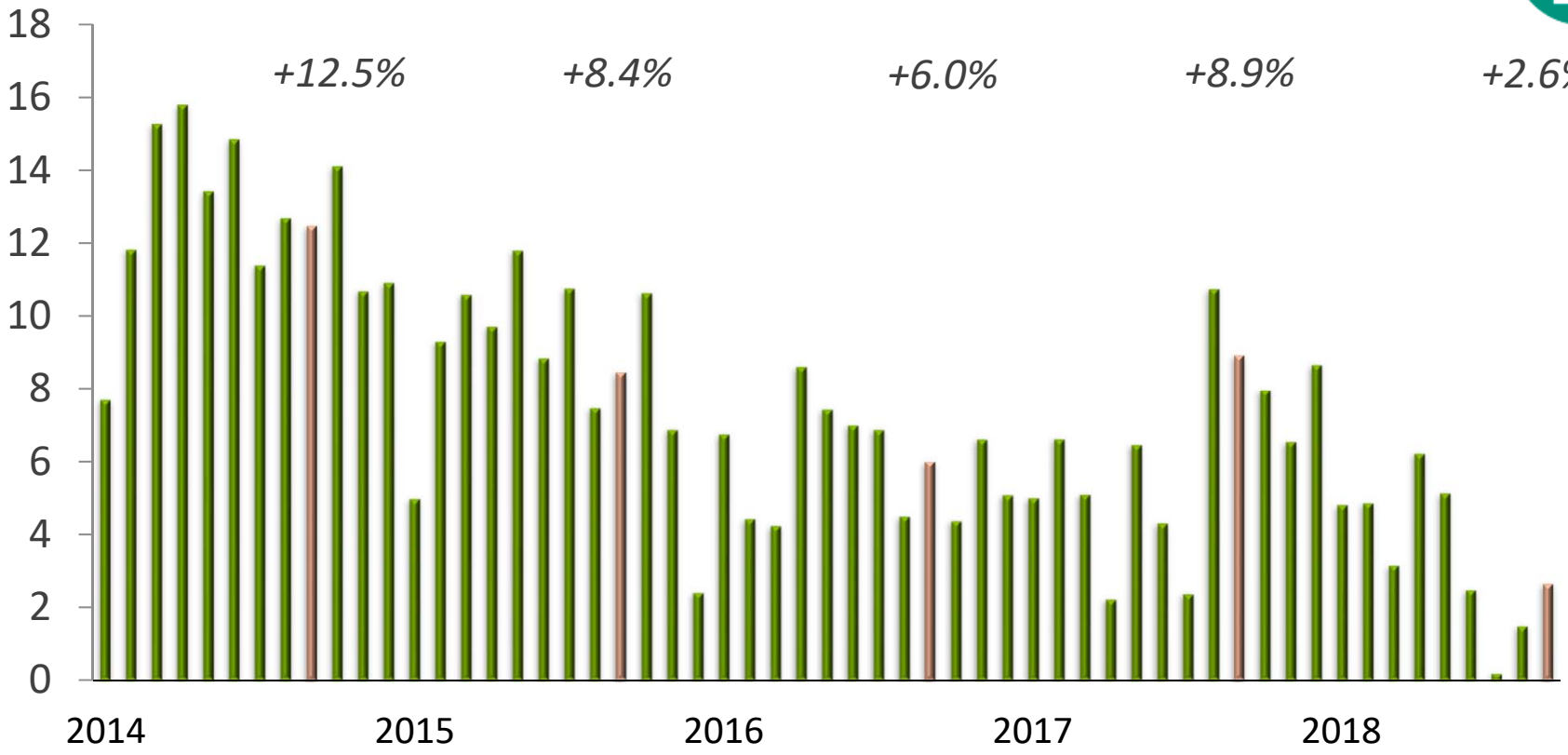
As Expected: Lower Occupancies Are The New Reality

		% Change
Room Supply		5.0%
Room Demand		4.3%
Occupancy	73.4%	-0.6%
A.D.R.	$146	4.4%
RevPAR		3.7%

Nashville, TN, KPIs, 12MMA 9/2018

© 2018 STR. All Rights Reserved.

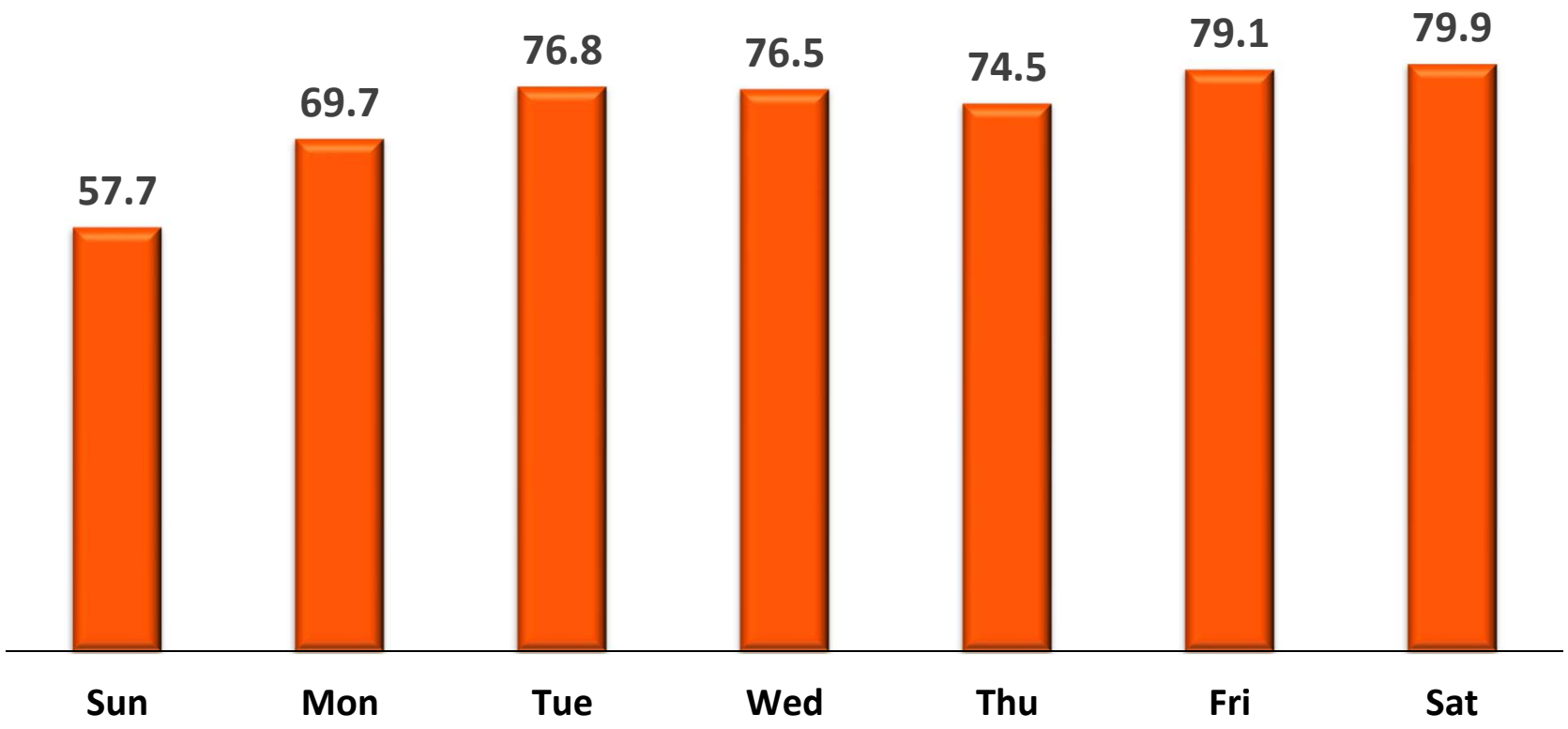
ADR % Change: Is The Party Over?



*Nashville, TN; ADR % Change; 1/14 – 9/18, callout: September ADR % Change

© 2018 STR. All Rights Reserved.

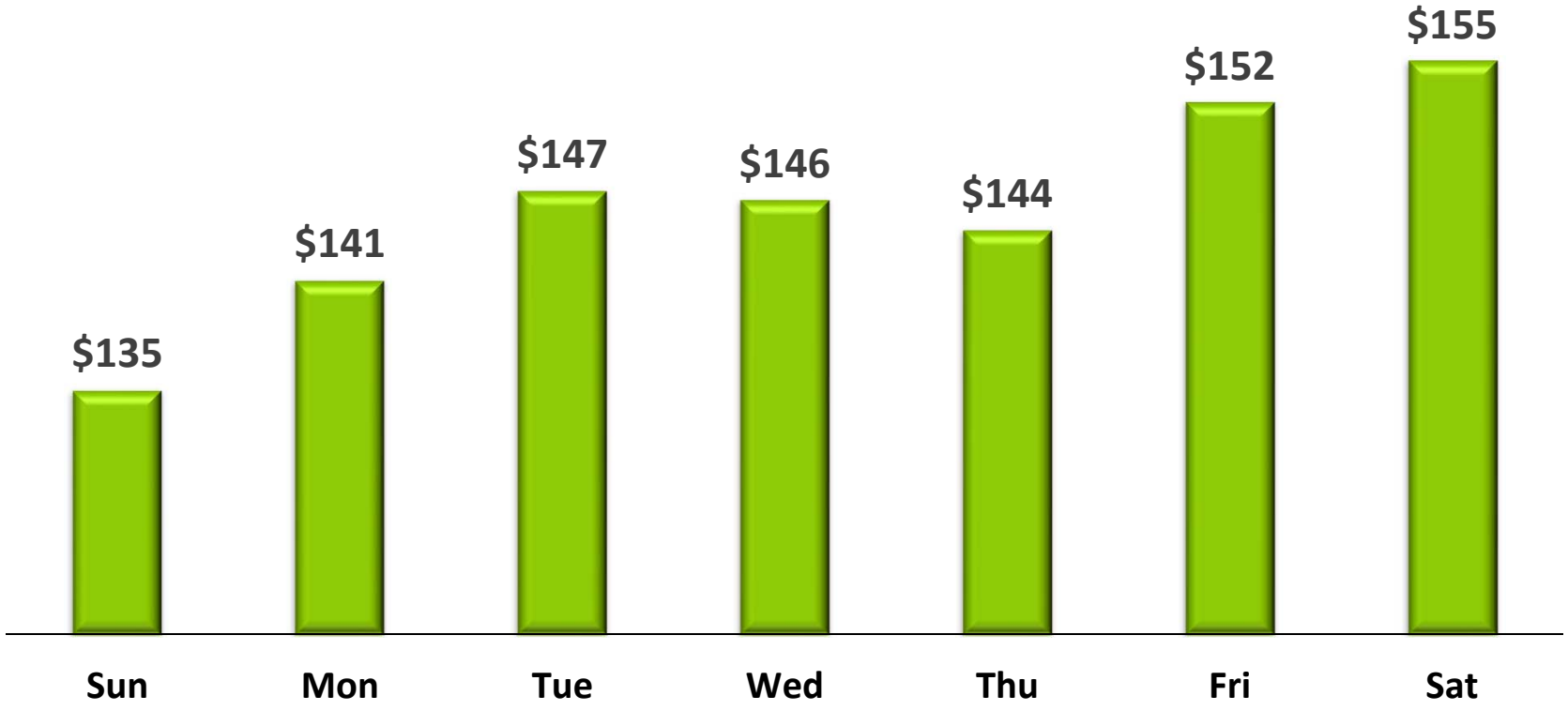
Nashville Occupancy %: Selling 8 out of 10 rooms FRI & SAT



*Occupancy % by day of week, year ending September 2018, Nashville, TN;

© 2018 STR. All Rights Reserved.

Nashville ADR $: Very Healthy Room Rates FRI & SAT



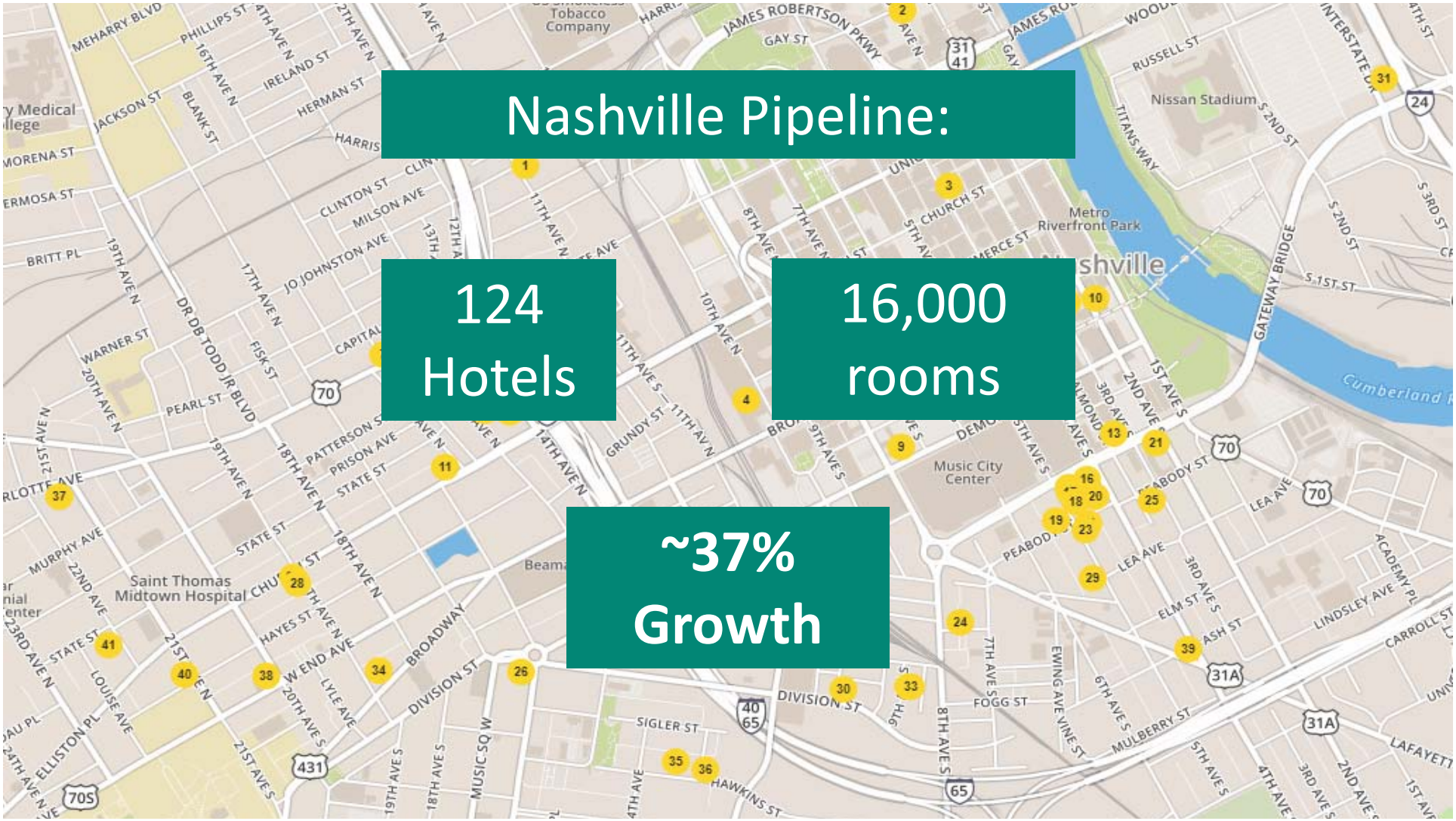
*Occupancy % by day of week, year ending September 2018, Nashville, TN

© 2018 STR. All Rights Reserved.

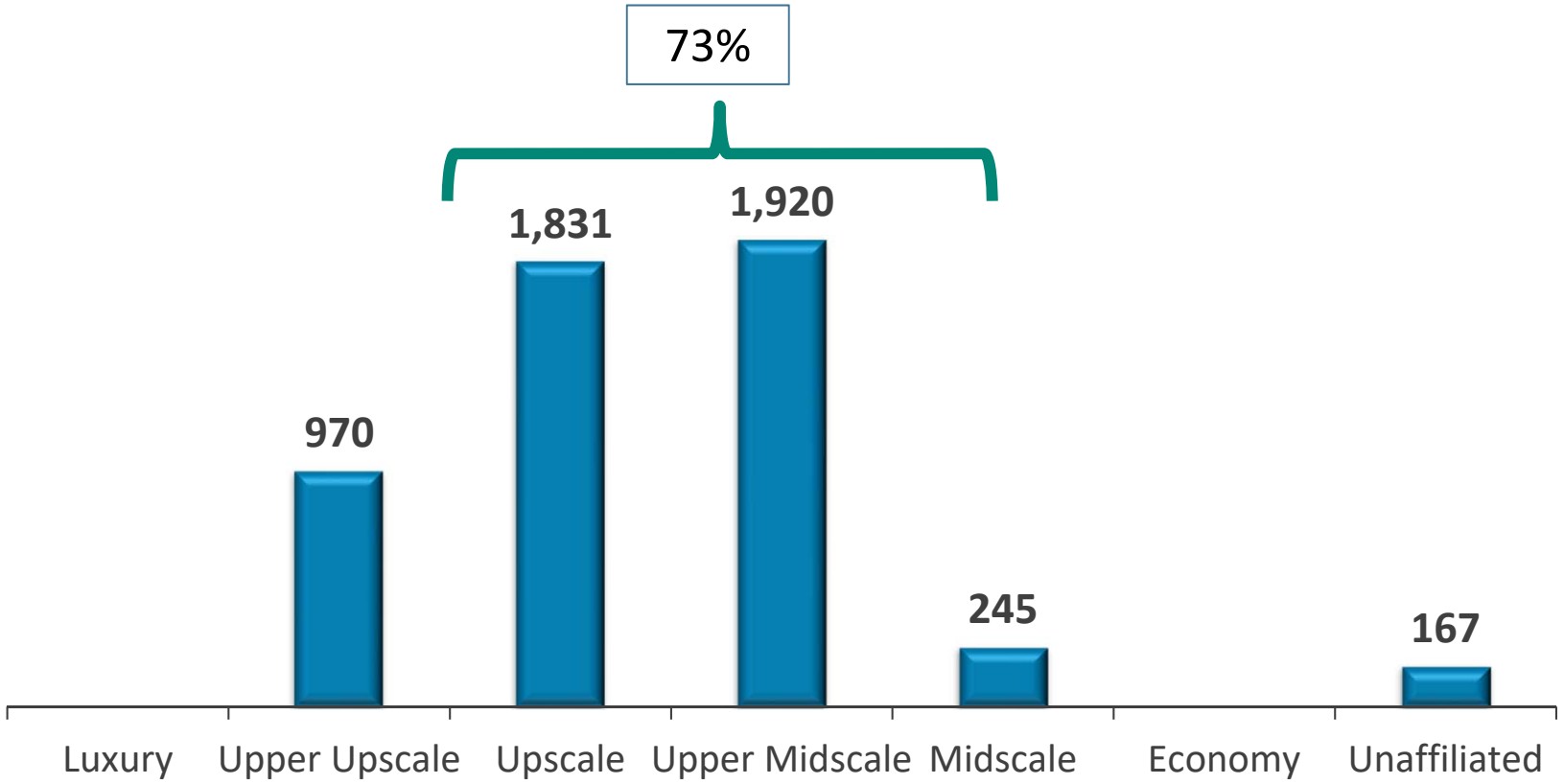

PEDAL TAVERN
AMANDA'S LAST BASH 2017 IN NASH
Thank You To All The Amandas!



Nashville Pipeline

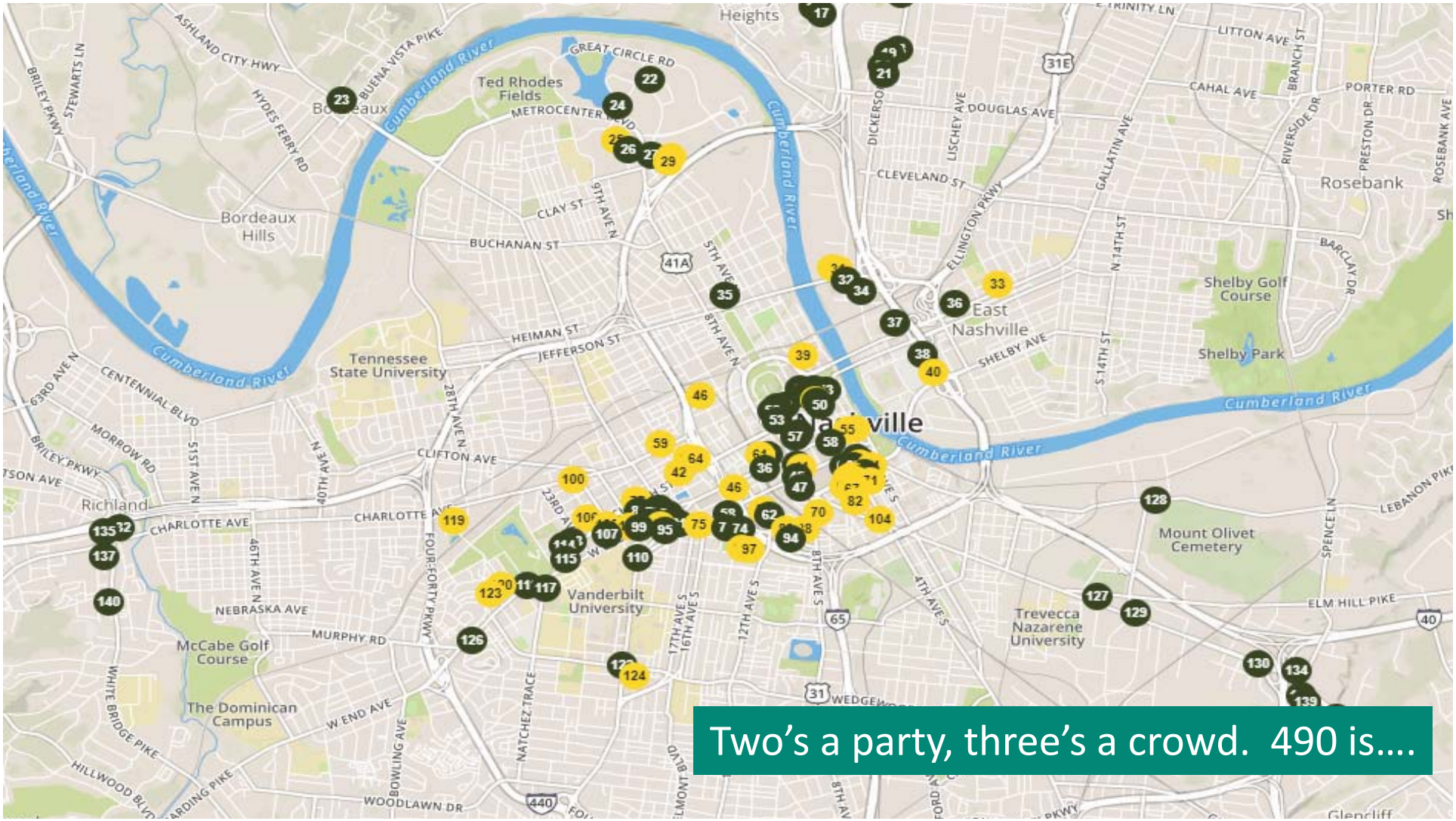

Nashville Pipeline:
124 Hotels
16,000 rooms
~37% Growth

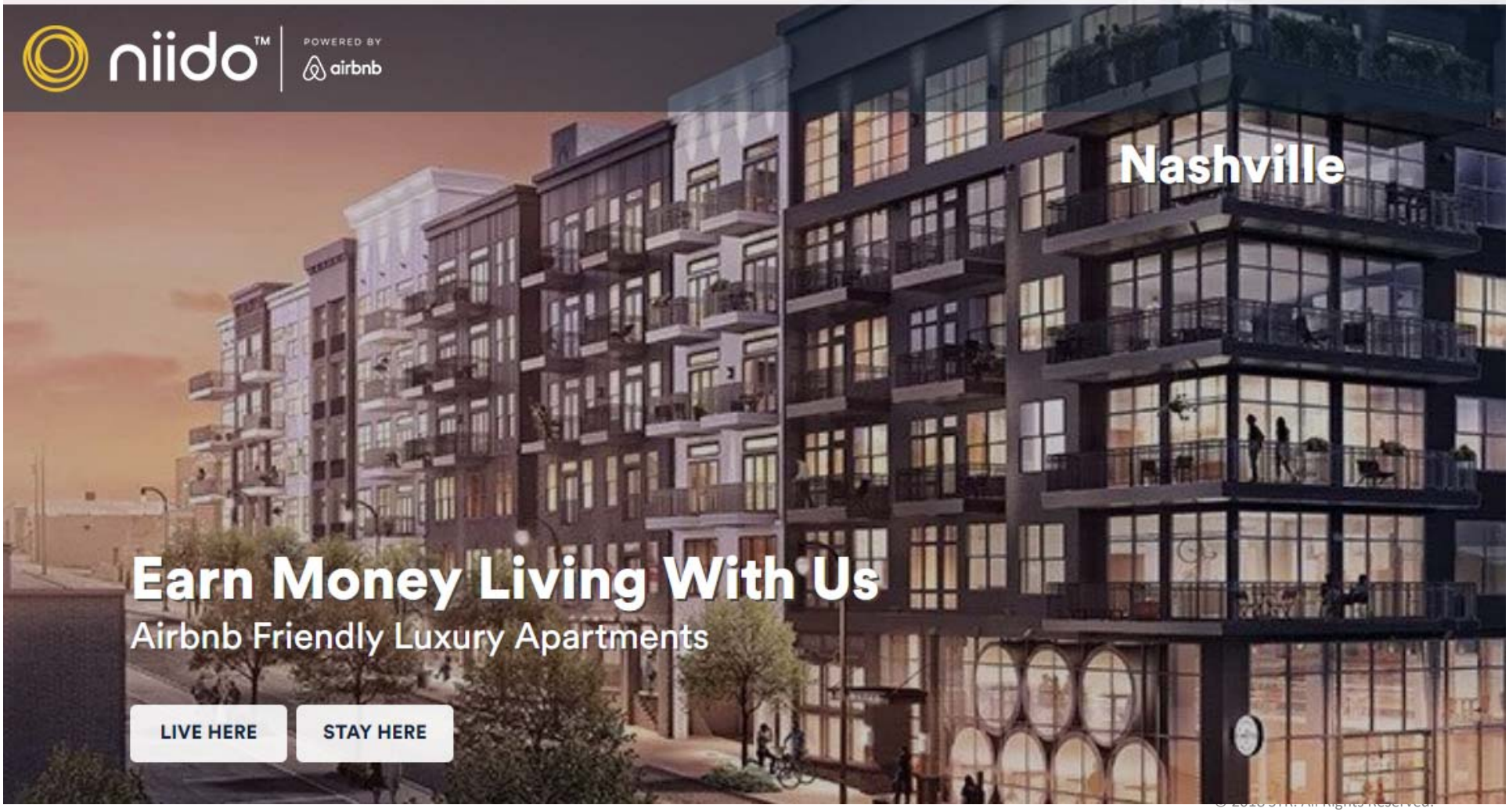
Limited Service Construction Is The Name Of The Game

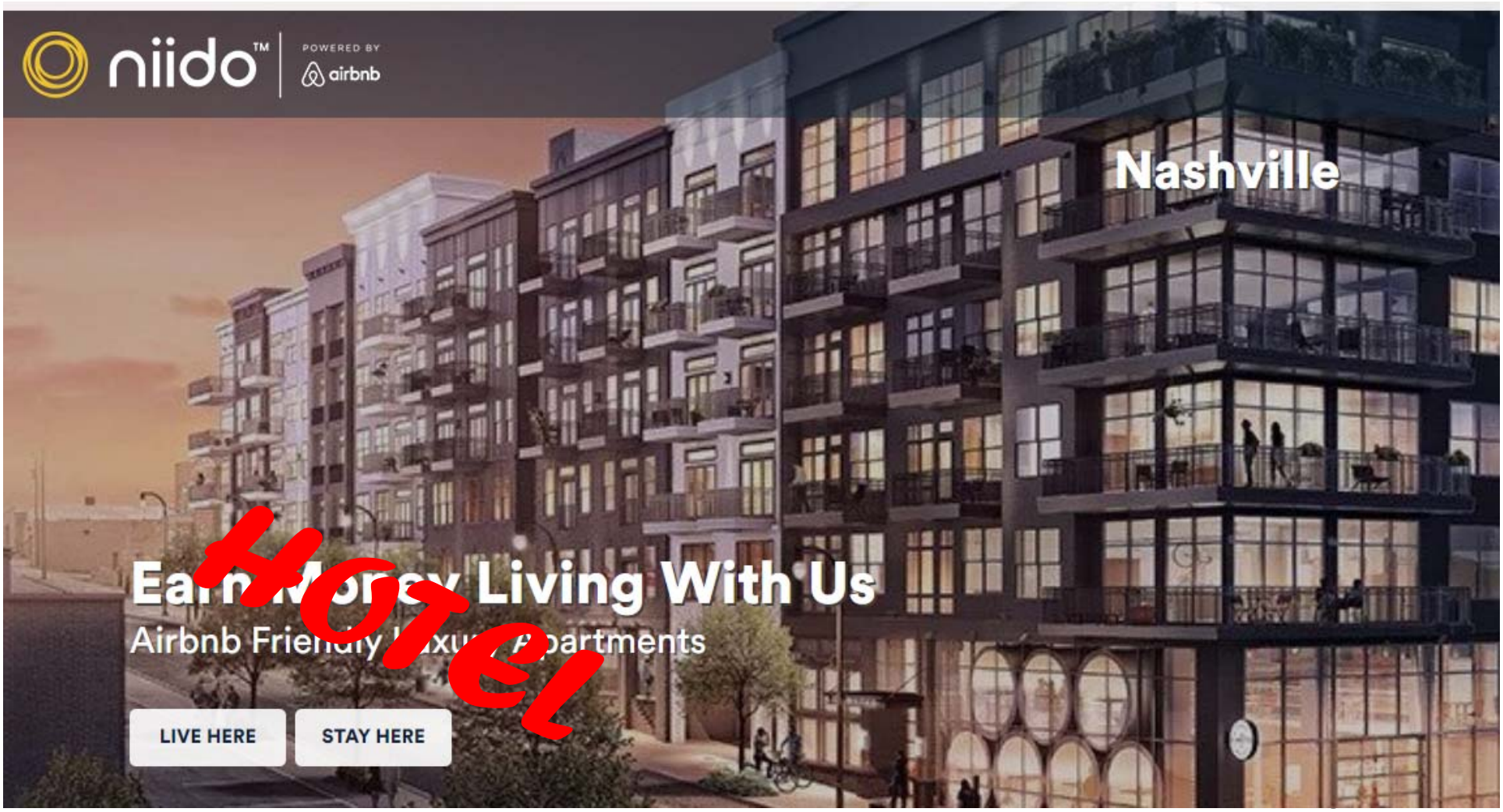


*Nashville Pipeline, Rooms In Construction, by Scale, September 2018

© 2018 STR. All Rights Reserved.


Two’s a party, three’s a crowd. 490 is….
Heights
Ted Rhodes Fields
Bordeaux Hills
Tennessee State University
Vanderbilt University
Richland
McCabe Golf Course
The Dominican Campus
East Nashville
Shelby Golf Course
Shelby Park
Rosebank
Mount Olivet Cemetery
Trevecca Nazarene University
Cumberland River
GREAT CIRCLE RD
METROCENTER BLVD
CLAY ST
BUCHANAN ST
HEIMAN ST
JEFFERSON ST
CLIFTON AVE
CHARLOTTE AVE
NEBRASKA AVE
MURPHY RD
W END AVE
WOODLAWN DR
CLEVELAND ST
DOUGLAS AVE
SHELBY AVE
CAHAL AVE
ELM HILL PIKE
CENTENNIAL BLVD
MORROW RD
BRILEY PKWY
ASHLAND CITY HWY
BUENA VISTA PIKE
HYDES FERRY RD
STEWARTS LN
WHITE BRIDGE PIKE
HILLWOOD BLVD
HARDING PIKE
NATCHEZ TRACE
BOWLING AVE
FOUR-FORTY PKWY
ELLINGTON PKWY
GALLATIN AVE
DICKERSON PIKE
LISCHEY AVE
RIVERSIDE DR
PRESTON DR
ROSEBANK AVE
BRANCH ST
LITTON AVE
TRINITY LN
BARCLAY DR
SPENCE LN
LEBANON PIKE
63RD AVE N
51ST AVE N
46TH AVE N
40TH AVE N
28TH AVE N
23RD AVE N
5TH AVE N
8TH AVE N
9TH AVE N
8TH AVE S
12TH AVE S
17TH AVE S
16TH AVE S
4TH AVE S
N 14TH ST
S 14TH ST
41A
31E
65
31
440
40

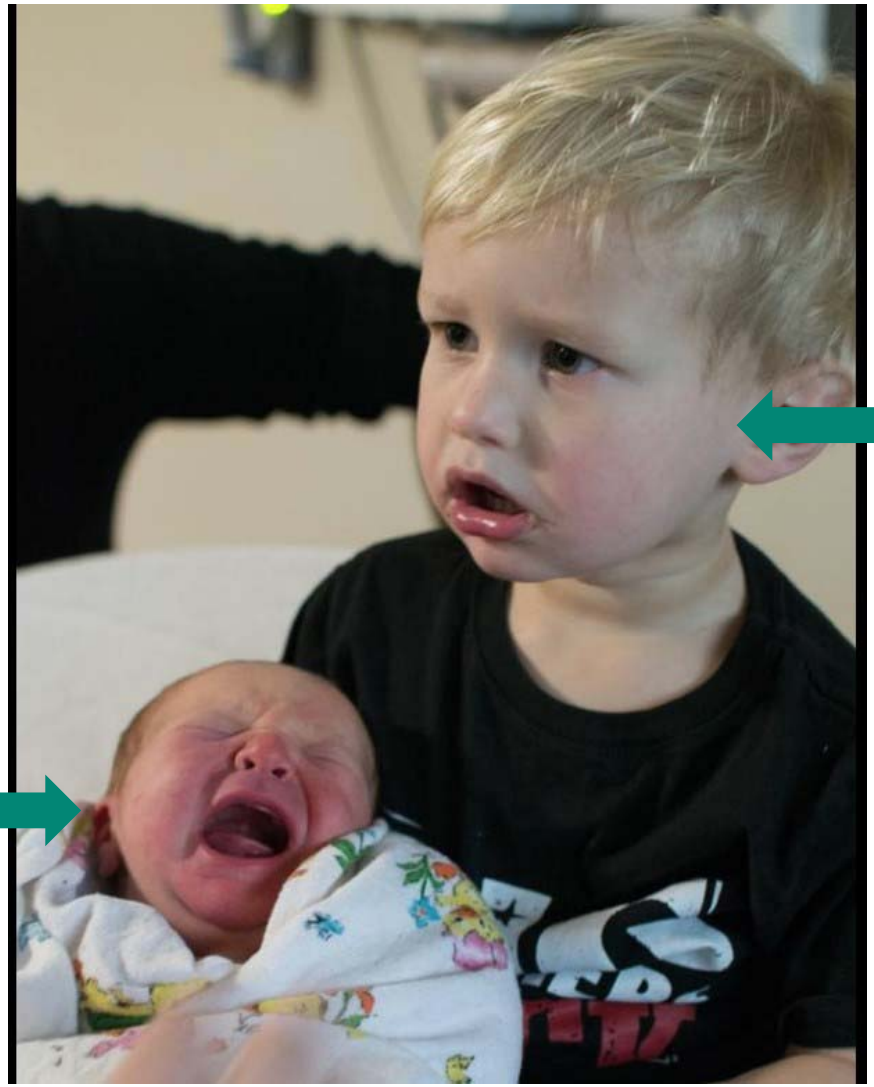

niido™
POWERED BY airbnb
Nashville
Earn Money Living With Us
Airbnb Friendly Luxury Apartments
LIVE HERE
STAY HERE


niido™
POWERED BY airbnb
Nashville
Hotel
Earn Money Living With Us
Airbnb Friendly Luxury Apartments
LIVE HERE
STAY HERE



© 2018 STR. All Rights Reserved.

The Current Mood …



Developers

Operators

© 2018 STR. All Rights Reserved.

RevPAR Projection

2018	2019
+2%	**+1.8%**

© 2018 STR. All Rights Reserved.


Who Will
Clean All
Those
Rooms?

Thank You!

Jan@str.com

Jan_Freitag

/JanFreitag

Hotel News Now

HOTELDATA CONFERENCE
Hosted by STR and Hotel News Now

© 2018 STR, Inc. All Rights Reserved.
Any reprint, use or republication of all or a part of this presentation without the prior written approval of STR, Inc. or STR Global, Ltd. trading as STR (collectively "STR") is strictly prohibited. Any such reproduction shall specifically credit STR as the source. This presentation is based on data collected by STR. No strategic advice or marketing recommendation is intended or implied.

Benchmarking your world