

CELEBRATING
30
YEARS

HUNTER | HOTEL
CONFERENCE



U.S. Hotel Industry Performance

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Benchmarking
↑ your world



8 Years of RevPAR Growth!



Agenda:

 **Performance**

 **Pipeline**

 **Airbnb**



www.hotelnewsnow.com

Data Dashboard > View All Data Presentations



Records!

February 2018 12 MMA: Continuing Our Record Run



		<u>% Change</u>
Room Supply		1.9%
Room Demand		2.9%
Occupancy (*Record*)	66.0%	1.0%
A.D.R. (*Record*)	\$127	2.0%
RevPAR (*Record*)	\$84	3.1%
Room Revenue		5.0%

Total US Results, February 2018 12MMA



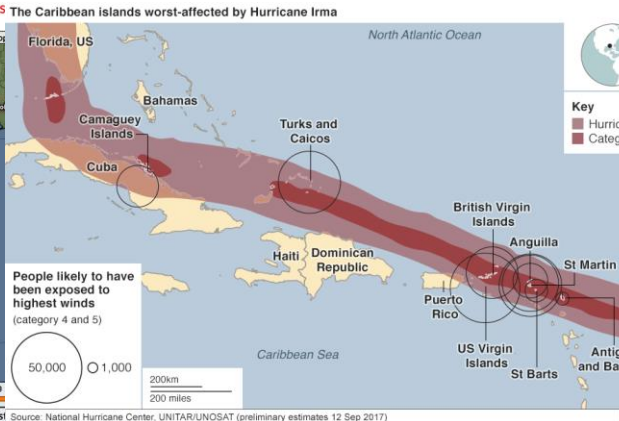
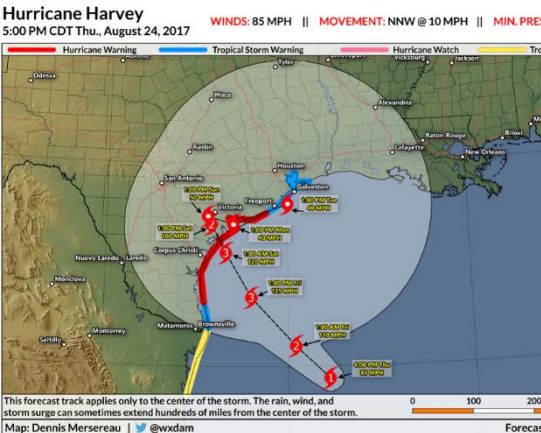
In Terms Of Accumulated Cyclone Energy (ACE), which measures the combined strength and duration of tropical storms and hurricanes, September 2017 was the most active month on record

<http://www.nhc.noaa.gov/>

Harvey:
63 People Killed
>\$70bn in Damage

Irma:
134 People Killed
>\$63bn in Damage

Maria:
66 People Killed
>\$51bn in Damage



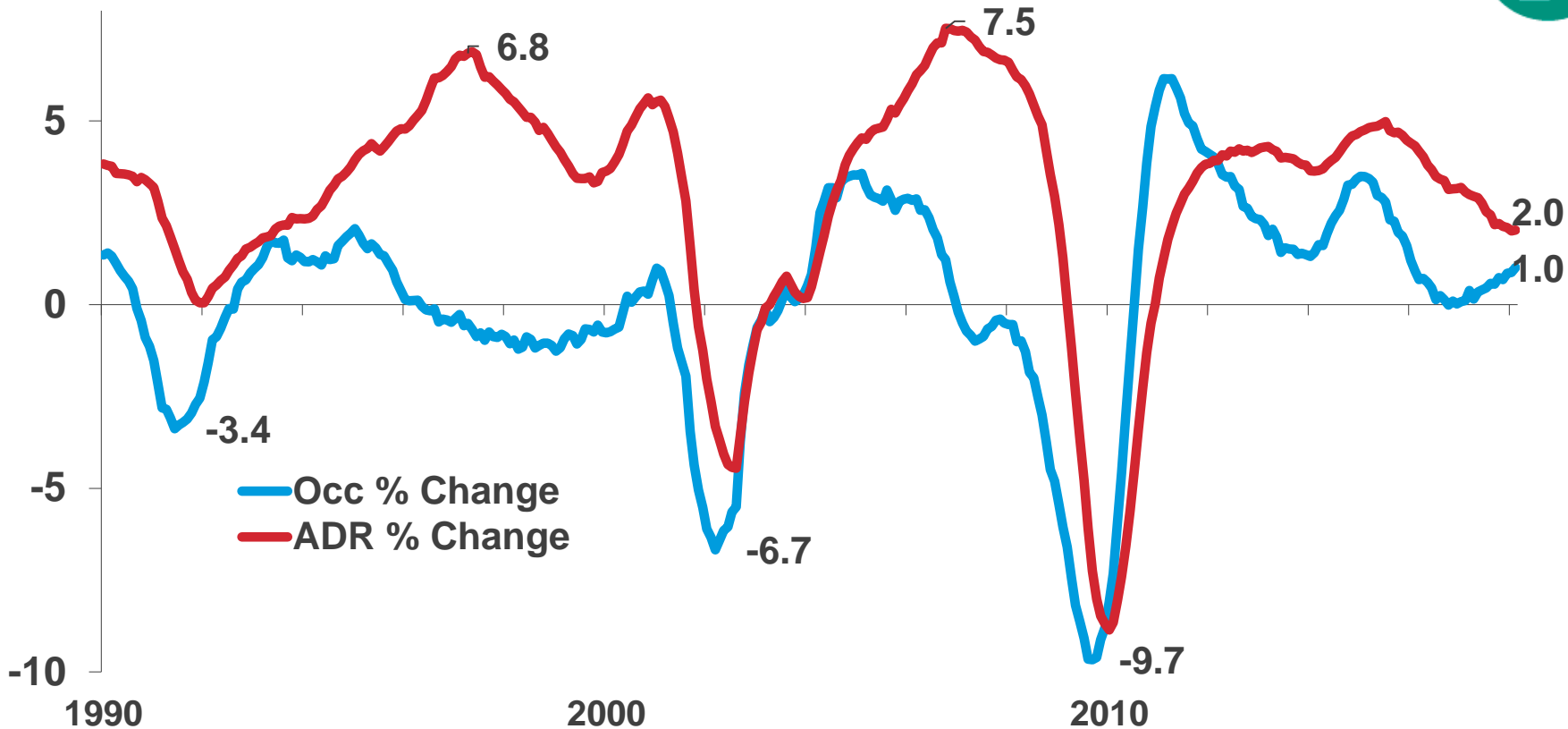


US February 12 MMA RevPAR: 2 States Continue to Help US Results

Total US:		+3.1%
	Florida:	+7.4%
	Texas:	+5.8%
Total US excluding Florida and Texas:		+2.8%

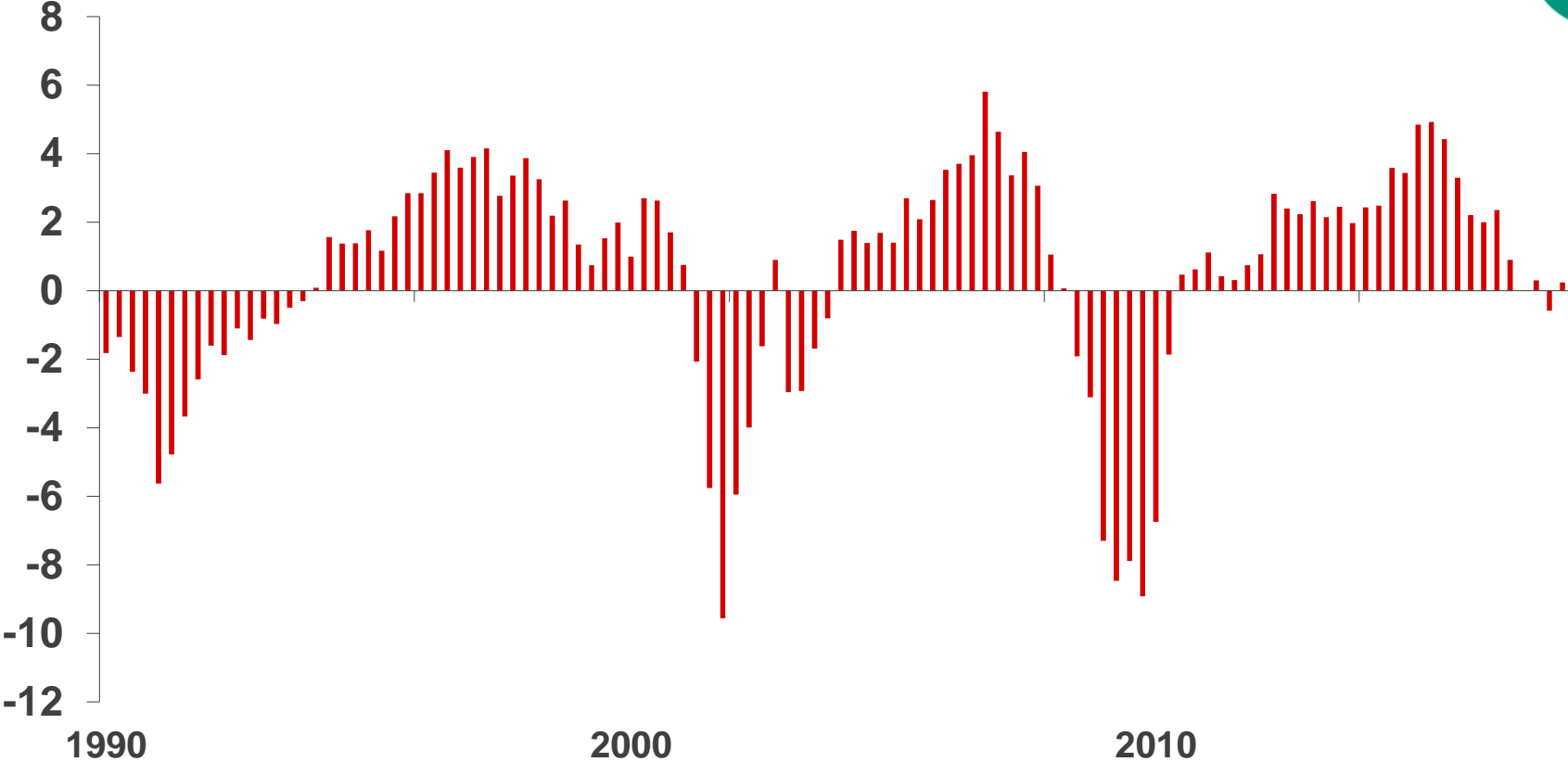
*RevPAR % Change, February 2018 12 MMA

ADR Growth Continues to Slide (For How Much Longer?)





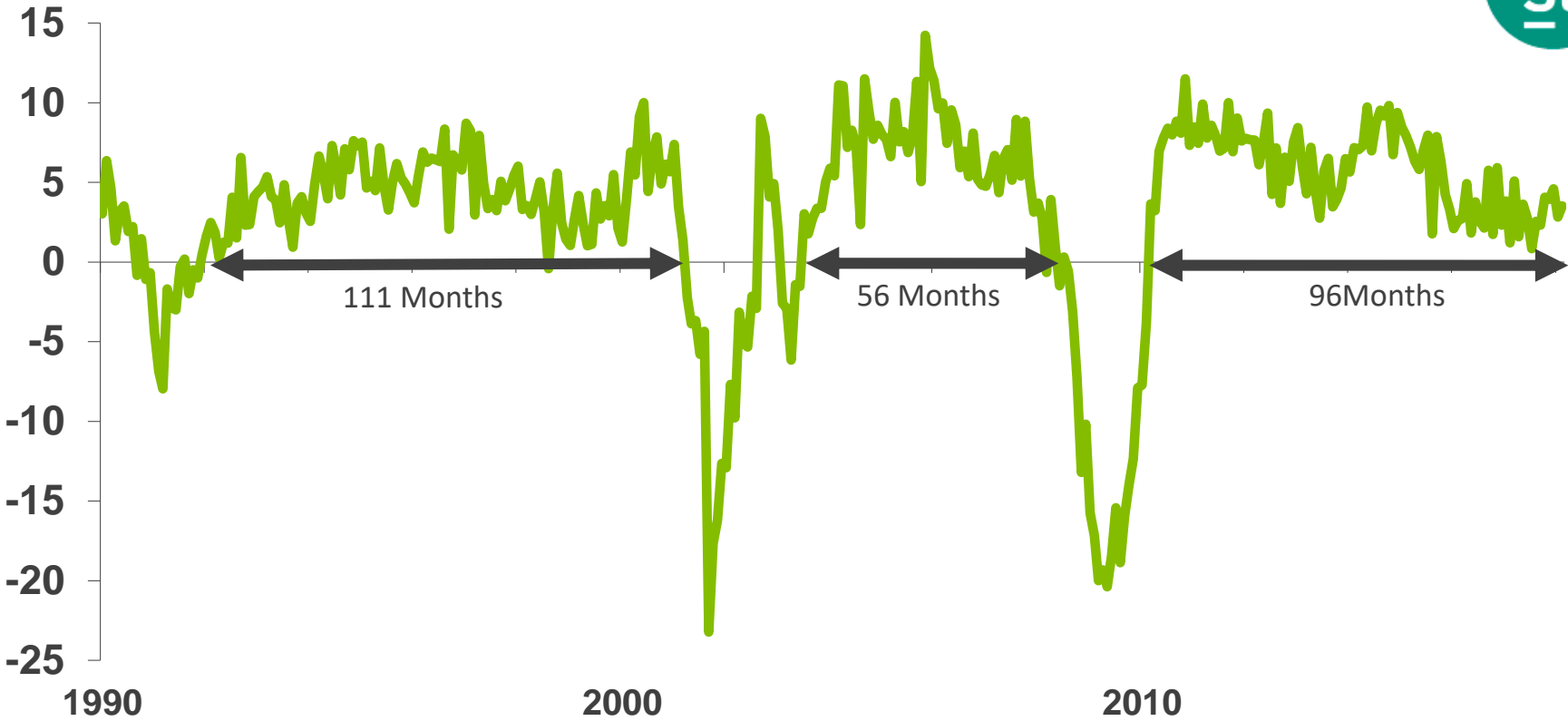
Real ADR Growth (ADR% minus CPI%) Now Hovers Around 0%



Total U.S., Real ADR % Change (ADR minus CPI), by quarter, Q1/1990 – Q4/2017



8 Consecutive Years of RevPAR Growth!!!



Total U.S., RevPAR % Change, 1/1990 – 02/2018

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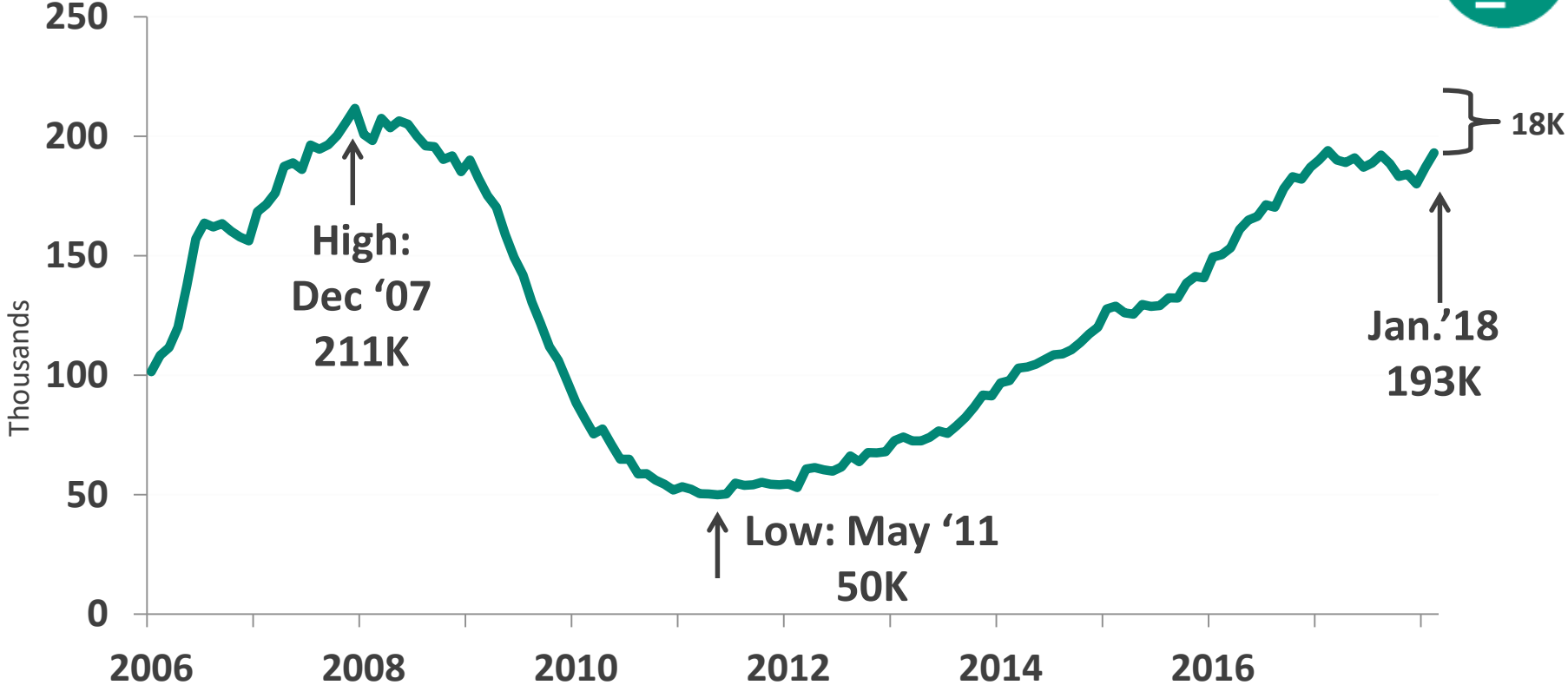


Pipeline



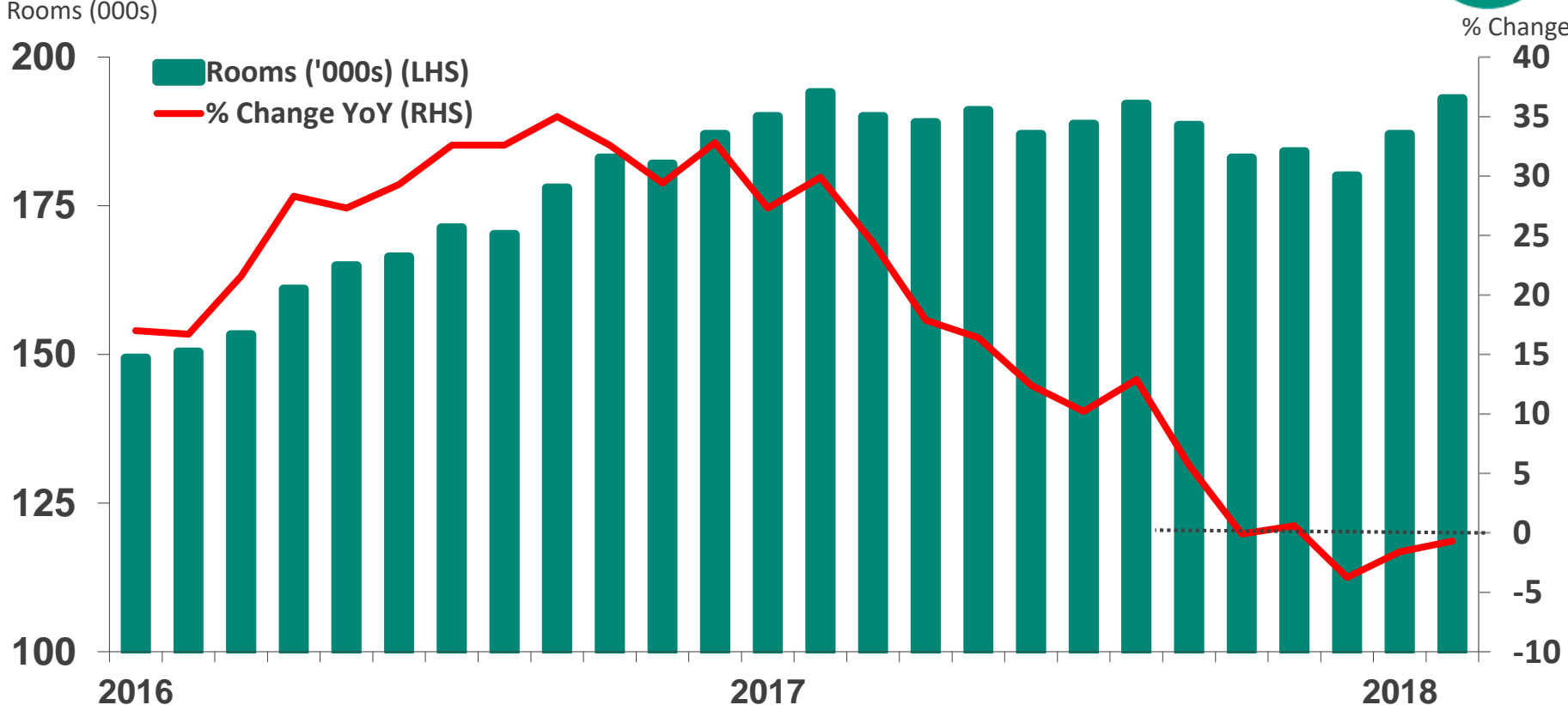


I/C Pipeline Is Leveling Off Below Prior Peak



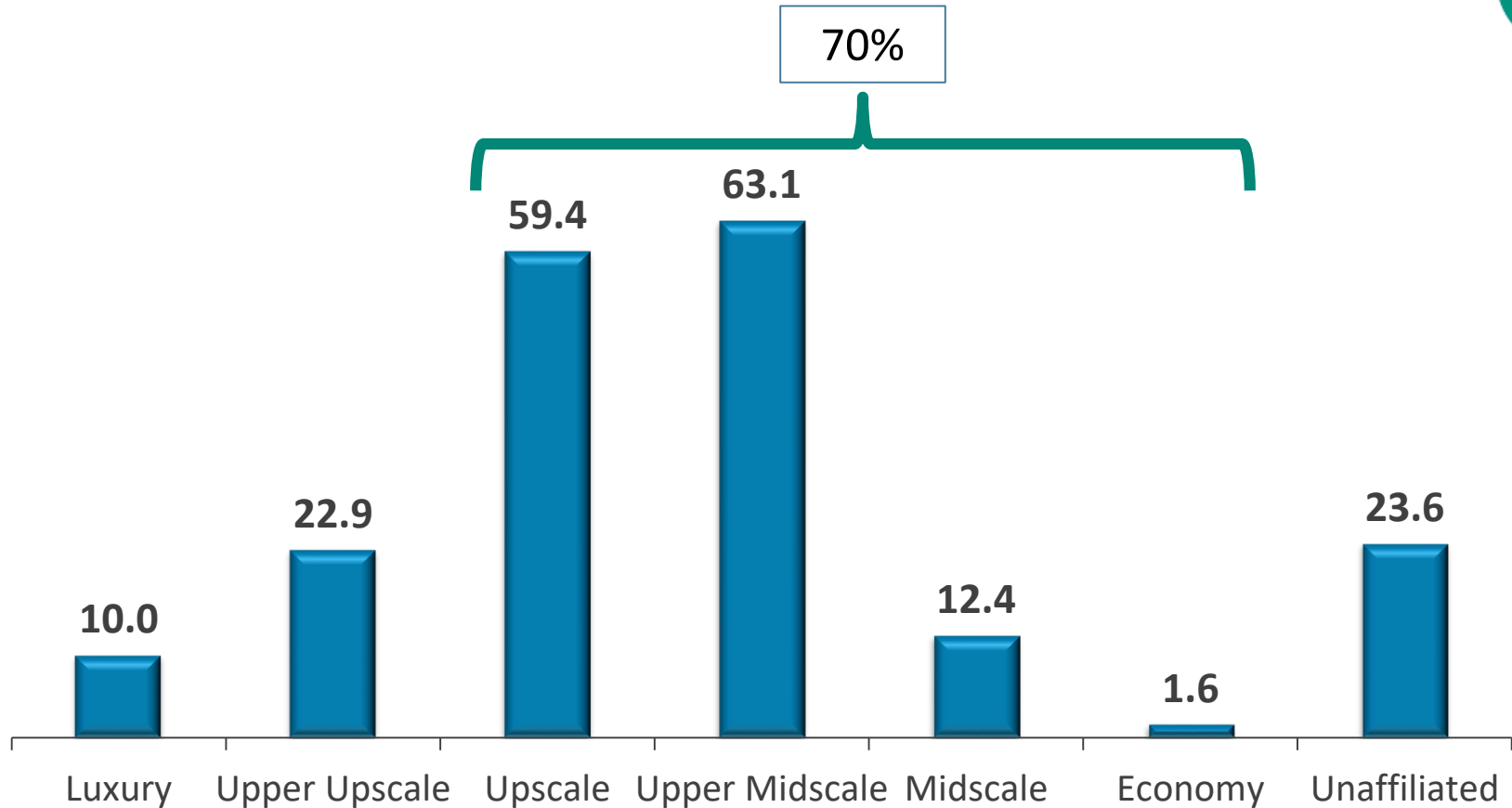
*Total US Pipeline; Rooms In Construction, in '000s; 1/2006 – 2/2018

Good News: Number of Rooms In Construction Starts to Decline



*Total U.S Pipeline, Rooms In Construction and % Change from Same Month Prior Year, 1/2016 – 2/2018

Limited Service Construction Is The Name Of The Game



*US Pipeline, Rooms In Construction , '000s Rooms, by Scale, February 2018

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F&B Performance



F&B Performance

United States

	This Year	Last Year	% Change
Total F&B RevPOR	\$105.56	\$103.93	 +1.6%
Catering & Banquets (Revenue Per Available SqFt)	\$0.77	\$0.77	 +0.8%
Venue (Revenue Per Available Seat)	\$45.55	\$43.49	 +4.7%
In-Room Dining (Revenue Per Occupied Room)	\$4.38	\$4.52	 -3.0%

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Forecast



Total United States

Key Performance Indicator Outlook (% Change vs. Prior Year) 2018F – 2019F



Outlook		
Metric	2018 Forecast	2019 Forecast
Supply	2.0%	1.9%
Demand	2.3%	2.0%
Occupancy	0.3%	0.1%
ADR	2.4%	2.3%
RevPAR	2.7%	2.4%

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Airbnb





The Email That Started Airbnb:

From: joe
Date: September 22, 2007
To: Brian
Subject: subletter

brian

i thought of a way to make a few bucks - turning our place into "designers bed and breakfast" - offering young designers who come into town a place to crash during the 4 day event, complete with wireless internet, a small desk space, sleeping mat, and breakfast each morning. Ha!

joe

The 7 New Airbnb Categories



Shared room



Private room



Entire home



Vacation home



Bed & breakfast



Boutique



Unique



Where Hotels Get Listed

Who is Afraid of The Big, Bad Wolf?



Company	# Of Times The Term "Airbnb" Was Used On Q4 Call
Marriott	
Hilton	
Hyatt	
IHG	
Choice	
Wyndham	

Who is Afraid of The Big, Bad Wolf?



Company	# Of Times The Term "Airbnb" Was Used On Q4 Call
Marriott	0
Hilton	0
Hyatt	0
IHG	0
Choice	0
Wyndham	0

Who is Afraid of The Big, Bad Wolf?



Company	# Of Times The Term "Airbnb" Was Used On Q4 Call
Marriott	0
Hilton	0
Hyatt	0
IHG	0
Choice	0
Wyndham	0
Expedia	3
Booking	3

Thank You!



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