



# US Hotel Overview

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# STR.com (COVID-19 landing page)

Analysis blogs, webinar recordings, press releases, etc.



The screenshot shows the STR.com website with a dark grey header. The header includes the STR logo, navigation links (DATA SOLUTIONS, INDUSTRIES WE SERVE, DATA INSIGHTS, WHO IS STR, CONTACT), a search icon, location (North America), language (English), a shopping cart icon with '0', and a 'LOG IN' button. The main content area features a large headline 'Data-driven solutions that empower your business' and a sub-headline 'Our global data and analytics services set the hospitality industry standard and inform your decisions through insights into your market and competition.' Below this are two buttons: 'TREND REPORTS' and 'COVID-19 UPDATES'. A large, semi-transparent overlay of a dashboard is shown on the right, displaying various metrics and charts for the week of August 26, 2018. The dashboard includes sections for 'Property Details', 'Top Performing Week/Day', 'Bottom Performing Week/Day', 'At A Glance' (with metrics like Occupancy, ADR, and RevPAR), and a map of Washington D.C. The overlay is framed by colorful geometric shapes (yellow, orange, green, blue, purple) on the left and right sides.

**STR**

DATA SOLUTIONS INDUSTRIES WE SERVE DATA INSIGHTS WHO IS STR CONTACT

North America English 0 LOG IN

## Data-driven solutions that empower your business

Our global data and analytics services set the hospitality industry standard and inform your decisions through insights into your market and competition.

**TREND REPORTS** **COVID-19 UPDATES**

**STR**

Week of August 26, 2018  
Reviewed on: August 26, 2018  
Welcome to your Weekly Update

**Property Details**

Excerpt National Resort & Convention Center, STR 10000  
Excerpt 10000  
200 West Point St  
Excerpt 10000, United States 20100-1100  
Excerpt 10000

Industry Segment: Submarket  
Excerpt National Resort & Convention Center  
Excerpt 10000-1100-1100  
Excerpt 10000-1100-1100

**Top Performing Week/Day**

Sun, August 19, 2018  
Fri, August 3, 2018  
Thu, August 23, 2018

**Bottom Performing Week/Day**

Mon, August 27, 2018  
Tue, August 28, 2018  
Sun, August 26, 2018

**Comp Sets**

Map of Washington D.C. showing property location.

**At A Glance**

Metric	Value	Change
Occupancy	51.7	-35.2%
ADR	187.27	9.7%
RevPAR	96.81	-29.0%



**Be Cool - Wear a Mask**

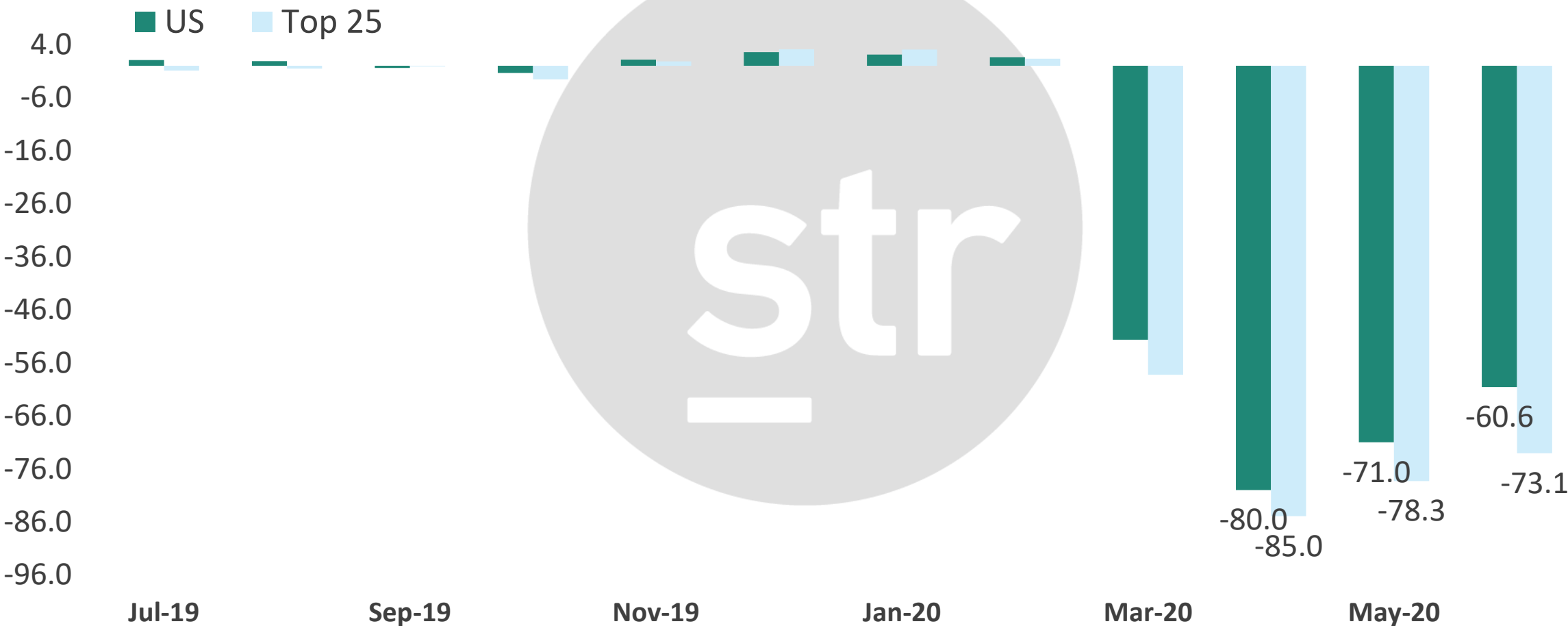
# Q2: Is This Bottom?

Total US, RevPAR % Change, by Quarter, Q1 2018 – Q2 2020



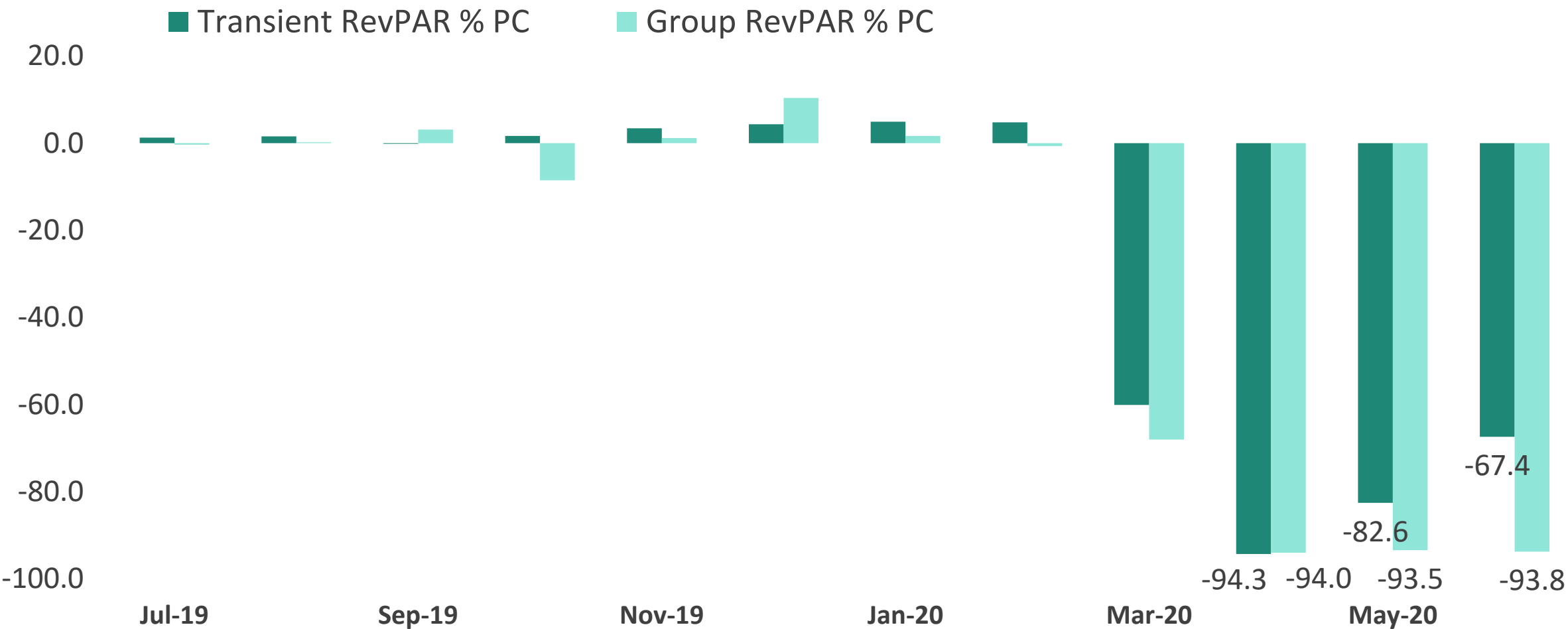
# Total US vs. Top 25 RevPAR % Change

Last 12 Months



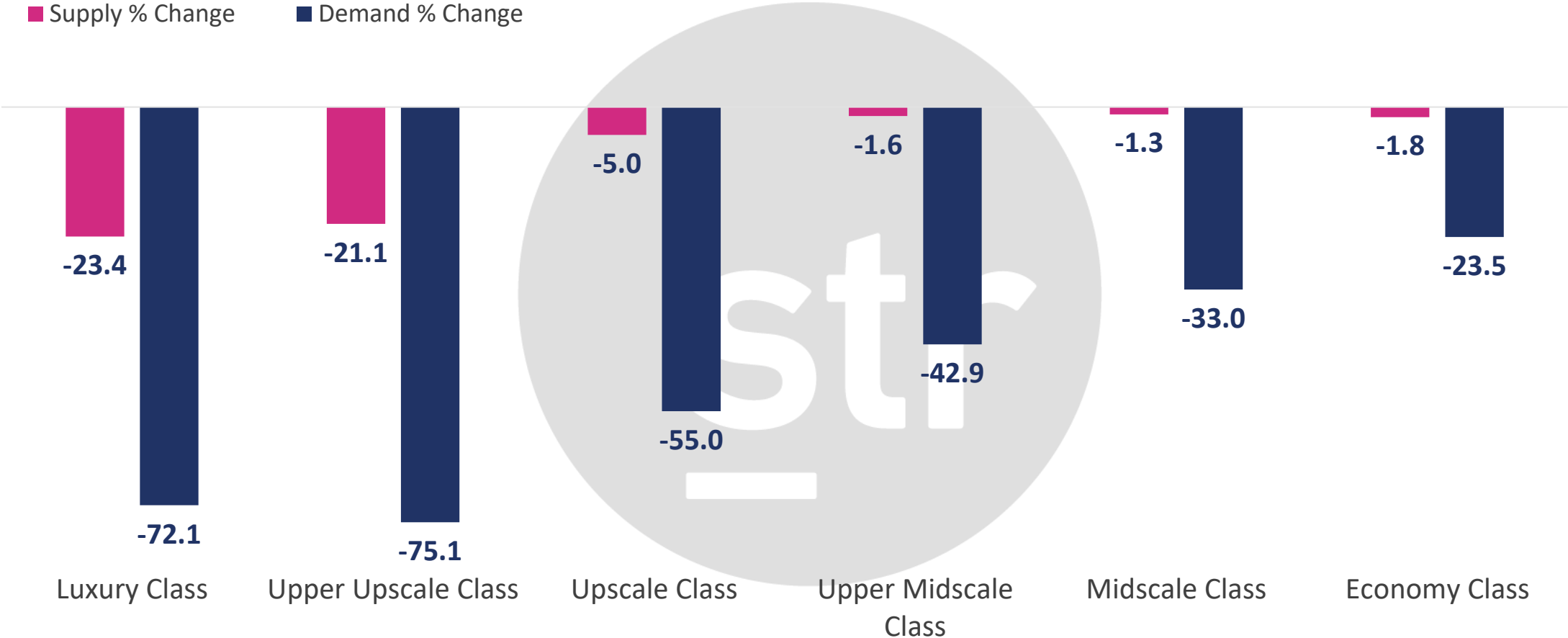
# Segmentation RevPAR: No Groups. None.

Last 12 Months



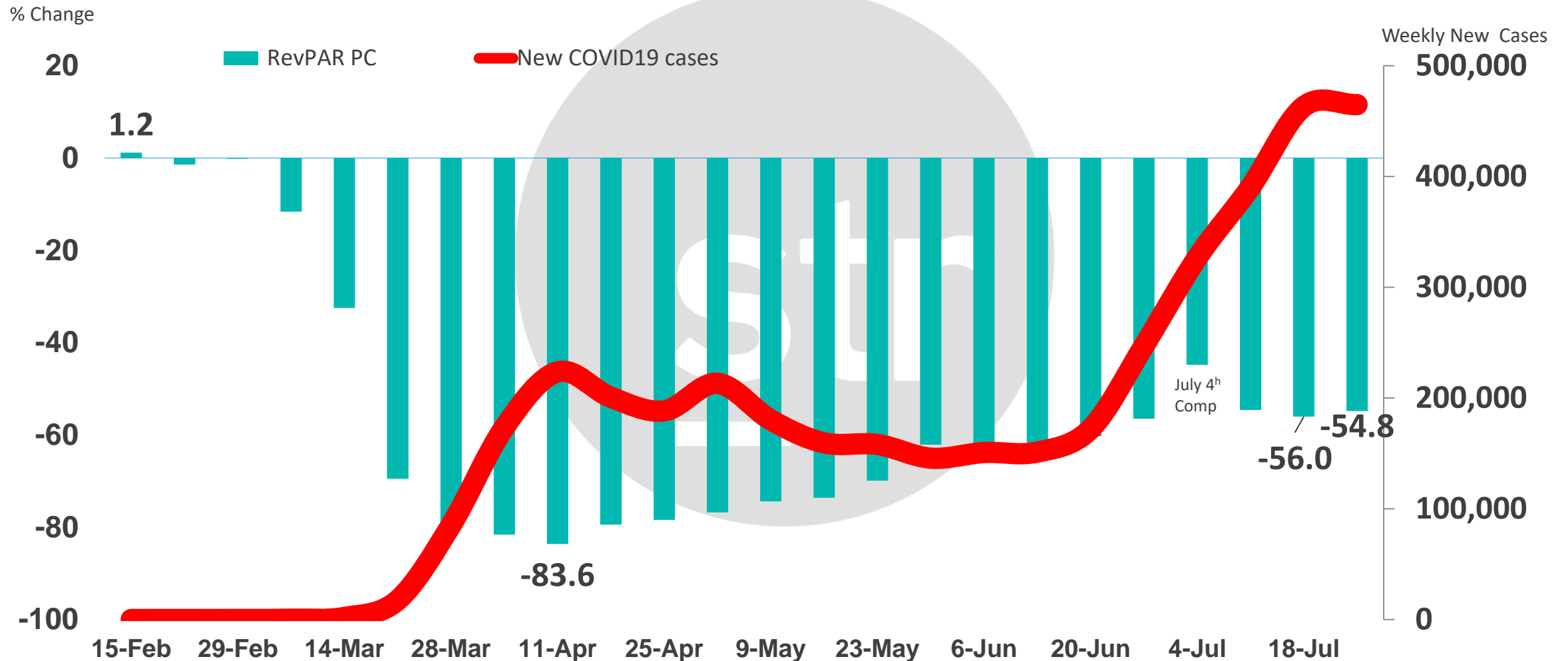
# Class: Sharp Decline on Upper End

June 2020



# R7 RevPAR % Change and New COVID19 Cases

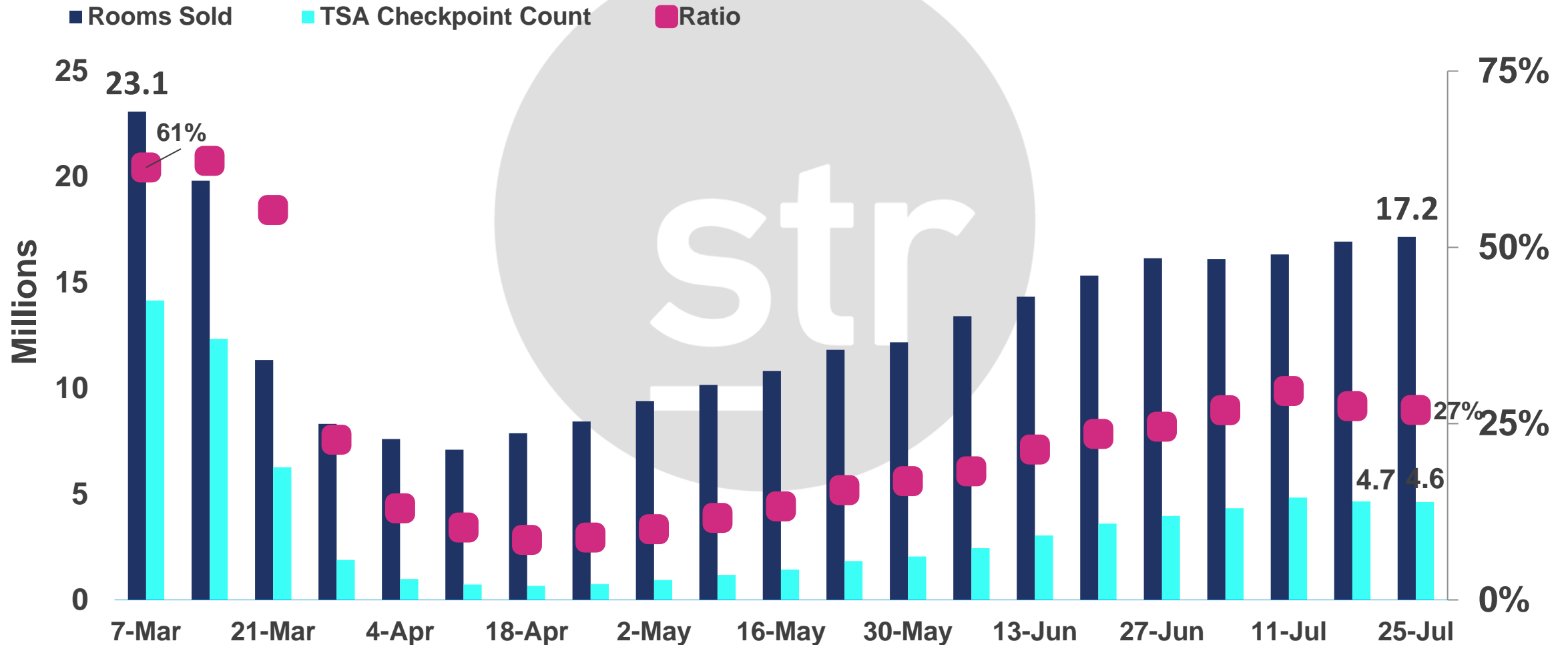
Total U.S., by Week





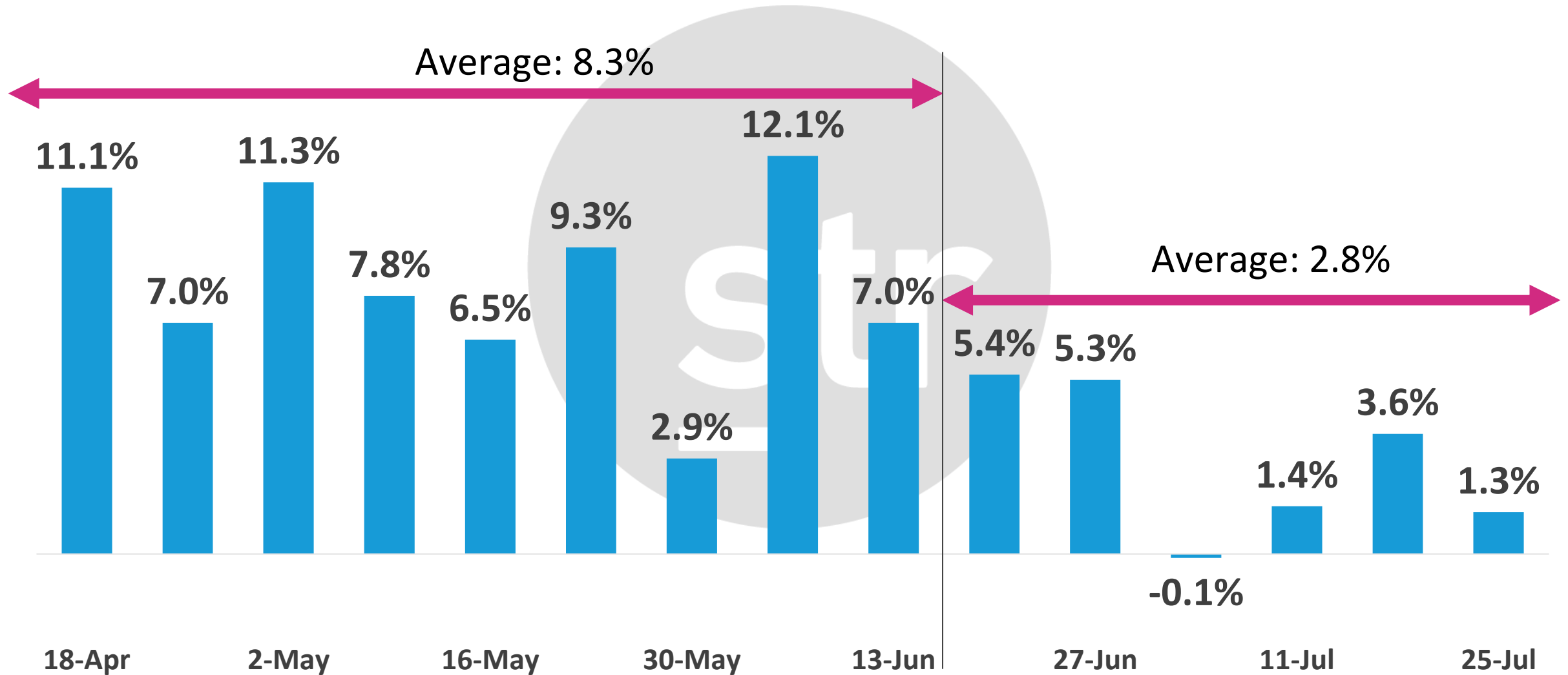
# Week of July 25: TSA Count Declined Again. Demand Increased.

## Total U.S., by Week



# Week Over Week Demand Increase Seems to Have Slowed

Total U.S., Demand % Change, Week over Week, from 4/11



# Oh, give me land, lots of land under starry skies above

Occ %, Hi/Lo States, Week ending July 25

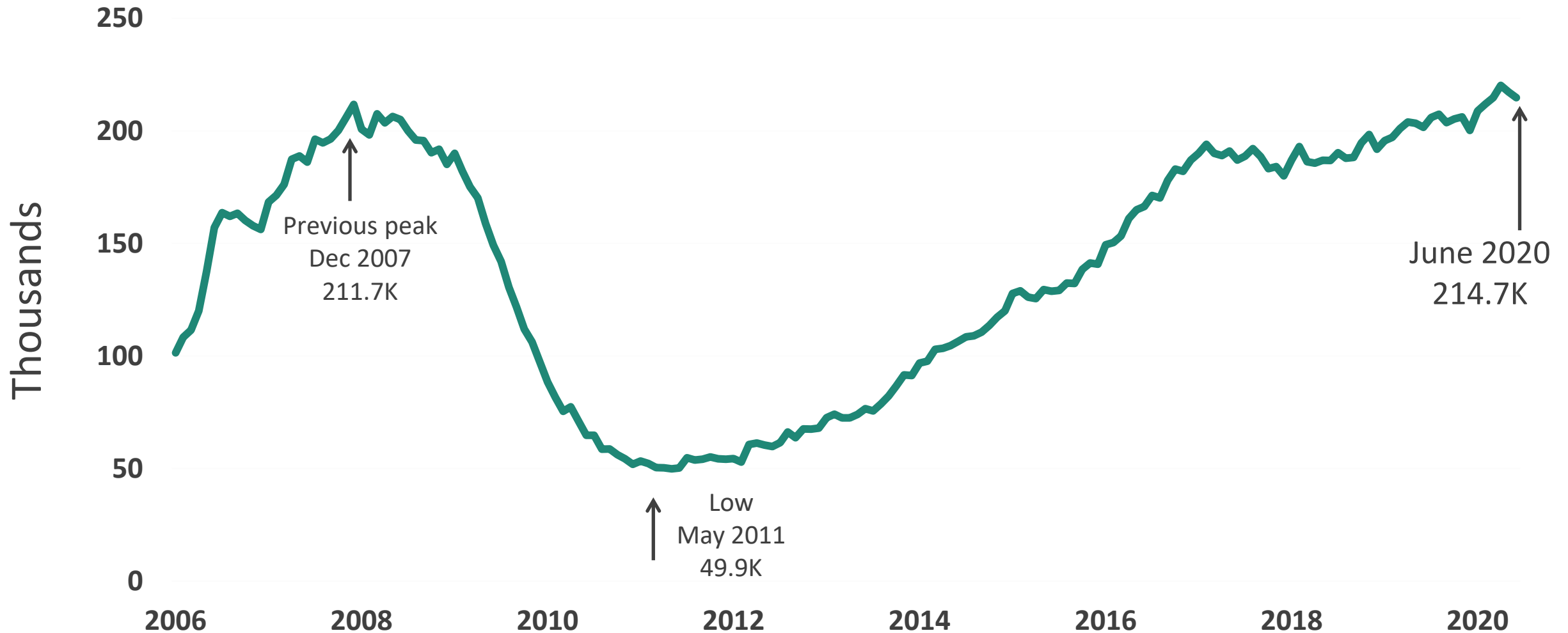


Market	Occ
Idaho	68.0
South Dakota	67.2
Montana	66.7
Wyoming	63.5
Delaware	59.7

Market	Occ
New York	41.5
Illinois	39.9
Massachusetts	38.6
Washington DC	24.5
Hawaii	20.4

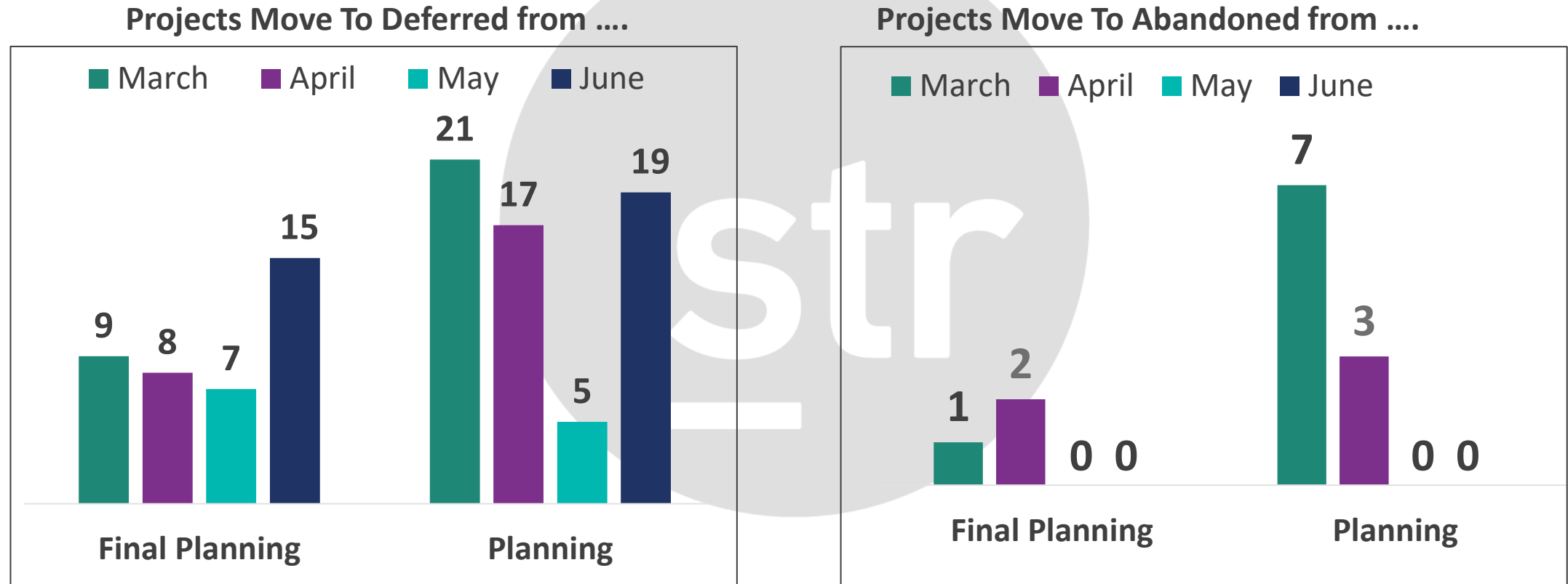
# U.S. Hotel Rooms In Construction Peaked in April

January 2006 - June 2020



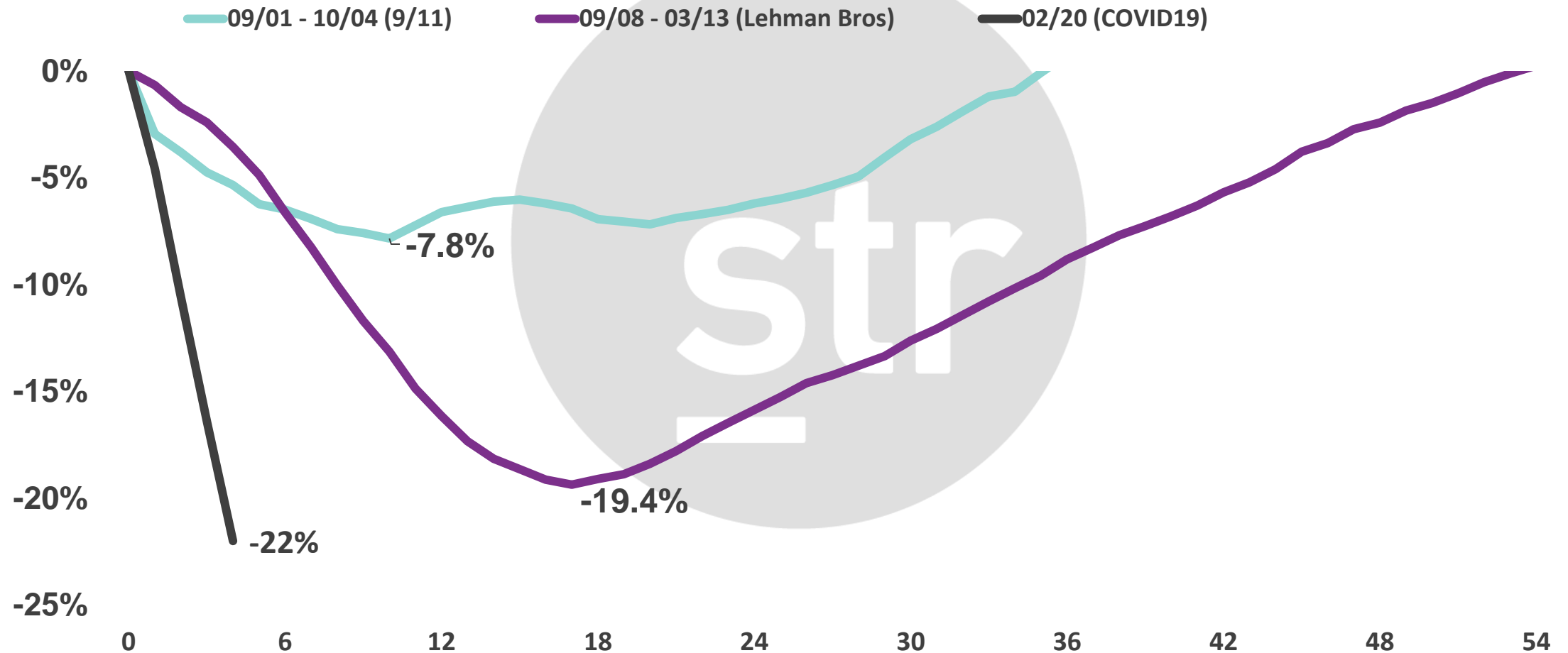
# Pipeline: Sharp Increase In Deferred Projects

U.S. Pipeline, Move to Deferred & Abandoned from Prior Phase



# RevPAR Recovery Will Take Much Longer This Time Around

Total U.S., 12MMA , Monthly RevPAR % Change, Indexed to Event



# Total U.S. Forecast – % Change (June 2020 Update)

Key Performance Indicators (% Change vs. Prior Year)

2019A – 2020F – 2021F

Metric	2019 Actual	2020 Forecast	2021 Forecast
Supply	+2.0%	-4.4%	+5.5%
Total-Room-Inventory Supply*	+2.0%	+1.4%	+1.3%
Demand	+1.9%	-36.2%	+35.4%
Total-Room-Inventory Occupancy*	-0.1%	-37.1%	+33.7%
ADR	+0.9%	-21.4%	+5.2%
Total-Room-Inventory RevPAR*	+0.8%	-50.6%	+40.6%

\*Reflects total-room-inventory methodology, which assumes no temporary hotel closures.

# Total U.S. Forecast (June 2020 Update)

Key Performance Indicators  
2019A – 2020F – 2021F

Metric	2019 Actual	2020 Forecast	2021 Forecast
Occupancy*	66.1%	41.6%	55.6%
ADR	\$131	\$103	\$108
RevPAR*	\$87	\$43	\$60



**-30%**

\*Reflects total-room-inventory methodology, which assumes no temporary hotel closures.



# Total United States

## Chain Scale Key Performance Indicator Outlook 2020F by Chain Scale (April 2020 Update)

2020 Year End Outlook			
Chain Scale	Occupancy (% chg)	ADR (% chg)	RevPAR (% chg)
Luxury	-66.1%	-6.1%	-68.2%
Upper Upscale	-63.4%	-15.9%	-69.3%
Upscale	-53.1%	-15.3%	-60.3%
Upper Midscale	-46.2%	-14.6%	-54.1%
Midscale	-36.3%	-12.6%	-44.3%
Economy	-23.0%	-10.9%	-31.4%
Independent	-43.5%	-20.5%	-55.0%

# 2020 Year End RevPAR Forecast

Top North American Markets, May 2020 Forecast (Markets sorted alphabetically)

- 80% to -70%	-69% to -60%	-59% to -50%
Boston, MA	Anaheim/Santa Ana, CA	Dallas, TX
Montreal, QC	Atlanta, GA	Houston, TX
New York, NY	Chicago, IL	Miami/Hialeah, FL
San Francisco/ San Mateo, CA	Denver, CO	Norfolk/Virginia Beach, VA
Toronto, ON	Detroit, MI	Phoenix, AZ
Vancouver, BC	Los Angeles/Long Beach, CA	San Diego, CA
	Minneapolis/St Paul MN-WI	Tampa/St Petersburg, FL
	Nashville, TN	
	New Orleans, LA	
	Oahu Island, HI	
	Orlando, FL	
	Philadelphia, PA-NJ	
	Seattle, WA	
	St Louis, MO-IL	
	Washington, DC-MD-VA	

# Spot The Difference...



## NASHVILLE BARS HERE'S WHY CORONAVIRUS IS OUT OF CONTROL

f 18.4K





7/19/2020 8:21 AM PT



NO MASK-VILLE




Leslee Mitchell



**Jan Freitag**  
SVP at STR  
6d • 










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Masks are THE Paycheck Protection Program for the hotel industry

   232 • 12 Comments


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Reactions



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# Questions?

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CONFERENCE**  
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