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Summer Continues with Inconsistent Rates and Bookings for North American Hoteliers

Group and Transient Leisure Travel Stand Out with Rate and Occupancy Growth in Third Quarter of 2017

NEW YORK – July 20, 2017 – As North American hoteliers push forward into the third quarter of 2017, both average daily rates (ADR) and bookings remain inconsistent across all travel segments, according to new data from TravelClick's July 2017 North American Hospitality Review (NAHR). This marks an ongoing trend for the year.

However, some travel segments are experiencing noteworthy signs of growth during the quarter. For example, group travel is up 1.3 percent in ADR and transient leisure up 2.6 percent in bookings.

"Accepting unpredictability as the new norm, hoteliers are finding this year's summer months a bit unusual compared to those in the past," said John Hach, TravelClick's senior industry analyst. "While ADR for all travel segments is slightly up 0.1 percent and bookings are slightly down -0.8 percent, there is some indication in the numbers that healthy gains are on the horizon in the coming months."

Twelve-Month Outlook (July 2017 – June 2018)

For the next 12 months (July 2017 – June 2018), transient bookings are up 0.5 percent year-over-year and ADR for this segment is slightly up 0.2 percent. When broken down further, the transient leisure (discount, qualified and wholesale) segment is up 2.8 percent, and ADR is slightly down -0.4 percent. The transient business (negotiated and retail) segment is down -3.5 percent; however, ADR is up 1.5 percent. Lastly, group bookings are up 0.8 percent in committed* room nights over the same time last year, and ADR is up 1.7 percent.

"Moving into the latter part of the summer season and into the fall, hoteliers must leverage business intelligence tools and forward-looking data for guidance to stay ahead of the competition in this continued period of inconsistency," added Hach. "Any number of factors could be contributing to this uncertain time – the current economic climate, global events, the continuation of the on-demand / sharing economy. As such, data is the key for hoteliers to stay informed and on top of the industry."

Third Quarter 2017

	ADR	Reserved Occupancy	RevPAR
All Travel Segments	+ 0.1%	- 0.8%	- 0.7%
Group Only	+ 1.3%	- 3.1%	- 1.9%
Transient Only Business + Leisure	- 0.4%	+ 0.1%	- 0.3%
Transient Business	+ 0.7%	- 4.0%	- 3.4%
Transient Leisure	- 0.9%	+ 2.6%	+1.6%

Fourth Quarter 2017

	ADR	Committed Occupancy
All Travel Segments	+ 0.9%	+ 4.8%
Group Only	+ 2.3%	+ 5.3%
Transient Only Business + Leisure	+ 0.5%	+ 3.4%
Transient Business	+ 2.0%	+ 2.1%
Transient Leisure	- 0.1	+ 4.2%

The July NAHR looks at group sales commitments and individual reservations in the 25 major North American markets for hotel stays that are booked by July 1, 2017 for the period of July 2017 to June 2018.

**Committed Occupancy – (Transient rooms reserved + group rooms committed) / capacity*

The third quarter combines forward-looking data (July – September).

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