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Media Contacts
Caitlin Kasunich / Christina Panta
KCSA Strategic Communications
212.896.1241 / 212.896.1208
ckasunich@kcsa.com / cpanta@kcsa.com

Steady Rates and Inconsistent Bookings Mark Ongoing Trend for North American Hoteliers

Transient Leisure Segment Continues to Stand Out as the Exception in Second Quarter of 2017

NEW YORK – May 30, 2017 – Heading into the summer months, North American hoteliers are continuing to experience stable average daily rates (ADR) alongside decreases in bookings during the second quarter of 2017. According to new data from TravelClick's May 2017 North American Hospitality Review (NAHR), this marks an ongoing trend from earlier in the year.

ADR for transient business travel in the second quarter, for example, is up 1.9 percent, but bookings are down -2.5 percent. Similarly, ADR for the group segment is up 0.9 percent, but occupancy is down -3.5 percent. The transient leisure segment continues to hold strong, with positive gains in both ADR and bookings, up 1.0 percent and 3.2 percent, respectively.

"Our latest data indicates that North American hoteliers are still dealing with dips in occupancy across the board, with bookings down -0.7 percent for all travel segments in the second quarter," said John Hach, TravelClick's senior industry analyst. "Future booking trends indicate that the inconsistency will likely continue throughout the upcoming summer travel season."

Twelve-Month Outlook (May 2017 – April 2018)

For the next 12 months (May 2017 – April 2018), transient bookings are down slightly -0.5 percent year-over-year, but ADR for this segment is up 1.4 percent. When broken down further, the transient leisure (discount, qualified and wholesale) segment is up 0.7 percent, and ADR is also up 0.7 percent. The transient business (negotiated and retail) segment is down -1.8 percent; however, ADR is up 2.4 percent. Lastly, group bookings are nearly flat at -0.2 percent in committed* room nights over the same time last year, while ADR is up 1.8 percent.

"As we near peak vacation season, business intelligence tools become even more important for hoteliers," added Hach. "There is an increasing need to gain competitive advantage through powerful forward-looking data, and this advantage enables timely differentiation from the local competition. Ultimately, it aids hoteliers in making proactive business decisions, especially when demand curves abruptly change."

Second Quarter 2017

	ADR	Reserved Occupancy	RevPAR
All Travel Segments	+ 1.2%	- 0.7%	+ 0.5%
Group Only	+ 0.9%	- 3.5%	- 2.6%
Transient Only Business+Leisure	+ 1.4%	+ 0.4%	+ 1.8%
Transient Business	+ 1.9%	- 2.5%	- 0.6%
Transient Leisure	+ 1.0%	+ 3.2%	+ 4.2%

Third Quarter 2017

	ADR	Committed Occupancy*
All Travel Segments	+ 1.3%	- 4.1%
Group Only	+ 4.4%	- 5.6%
Transient Only Business + Leisure	+ 0.2%	- 0.1%
Transient Business	+ 0.7%	- 3.1%
Transient Leisure	- 0.1%	+ 1.4%

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

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

The second quarter combines historical data (April) and forward-looking data (May through June).

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About TravelClick
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