



U.S. & Canada Results Week Ending March 28



HOTEL DATA
CONFERENCE
Hosted by STR and Hotel News Now

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STR.com (COVID-19 landing page)

Analysis blogs, webinar recordings, press releases, etc.



The screenshot displays the STR.com website interface. At the top, there is a navigation bar with the STR logo on the left and menu items: DATA SOLUTIONS, INDUSTRIES WE SERVE, DATA INSIGHTS, WHO IS STR, and CONTACT. On the right side of the navigation bar, there is a search icon, a location dropdown set to 'North America', a language dropdown set to 'English', a shopping cart icon with a '0' notification, and a 'LOG IN' button.

The main content area features a large heading: "Data-driven solutions that empower your business". Below this heading is a paragraph: "Our global data and analytics services set the hospitality industry standard and inform your decisions through insights into your market and competition." At the bottom left of this section, there are two buttons: "TREND REPORTS" and "COVID-19 UPDATES".

The central focus is a dashboard window titled "Week of August 26, 2018". The dashboard includes a sidebar with navigation options like "Dashboard", "Alerts", "Tools", and "Reports". The main content area is divided into several sections: "Property Details" for "Regent National Resort & Convention Center, 37th St, Denver, CO, USA", "Industry Report" for "Suburban", and "Comp Sets" with a map of the "Wynning D.C." area. Below these are "Top Performing Week/Day" and "Bottom Performing Week/Day" sections. The "At A Glance" section provides a summary of key metrics:

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

The dashboard also includes a "Map" section showing the location of the property and a "Legend" for the data series.

RevPAR In Free Fall

Total U.S. RevPAR % Change, Week ending March 28



-80.3%

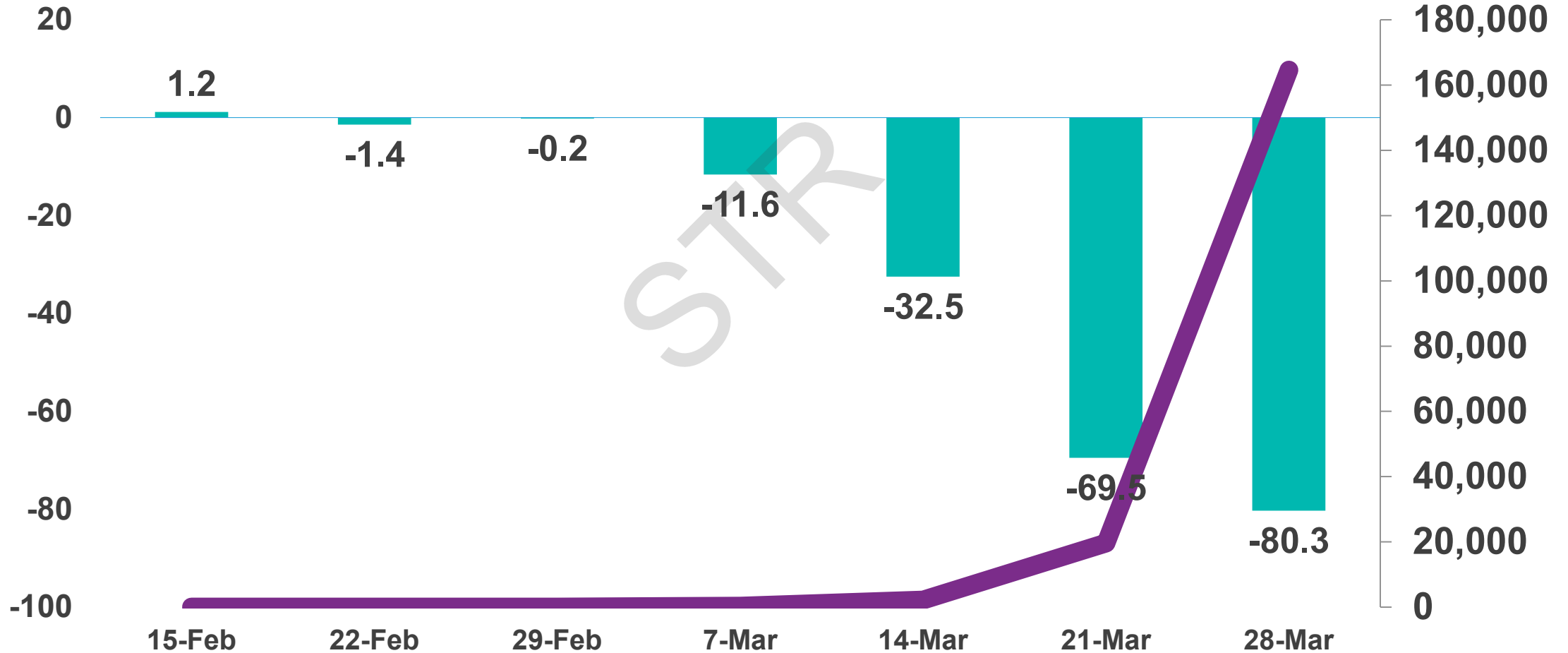
RevPAR % Change and COVID-19 Cases

Total U.S., by Week



% Change

Total Cases



EMERGENCY EXECUTIVE ORDER NUMBER 2020-4

March 30, 2020

To: All Elected Officials, Department Heads, Division Chiefs, Independent Agencies, Authorities, Boards, Commissions, and Councils

From: Lenny Curry, Mayor

Subject: Hotel, Motel and Public Lodging Reservation Restrictions

Pursuant to Section 674.206, Jacksonville Ordinance Code, on March 13, 2020, I issued Emergency Proclamation 2020-001, which proclaimed and declared a public emergency in the City of Jacksonville concerning the threat to the City's citizens, resources and general welfare posed by the COVID-19 pandemic. Once this emergency was declared, Section 674.206, Jacksonville Ordinance Code, grants me the authority to

Unfortunately, other locations outside the City have not been as proactive or as vigilant in enforcing the CDC's guidance and maintaining proper social distancing and engaging in non-essential travel. Numerous persons have congregated in the state for spring break, cruises and other personal travel, thereby potentially endangering the residents of the City by serving as virus transmission vectors from around the country.

encouraged the City's residents to responsibly practice appropriate social distancing and other health-conscious actions. I have also encouraged residents to limit non-essential, public outings and appearances.

Unfortunately, other locations outside the City have not been as proactive or as vigilant in enforcing the CDC's guidance and maintaining proper social distancing and engaging in non-essential travel. Numerous persons have congregated in the state for spring break, cruises and other personal travel, thereby potentially endangering the residents of the City by serving as virus transmission vectors from around the country.

Additionally, availability of hotels, motels and other places of public accommodations are needed for shelter or housing options for healthcare professionals, first responders, national guard members, law enforcement, state or federal government employees, airline crewmembers, other essential personnel, patients, patients' families,

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During the effective period of this Emergency Order, public lodging establishments shall not accept any occupants other than Essential Lodgers, regardless of when reservations were made, nor shall they extend existing reservations for any person other than Essential Lodgers.

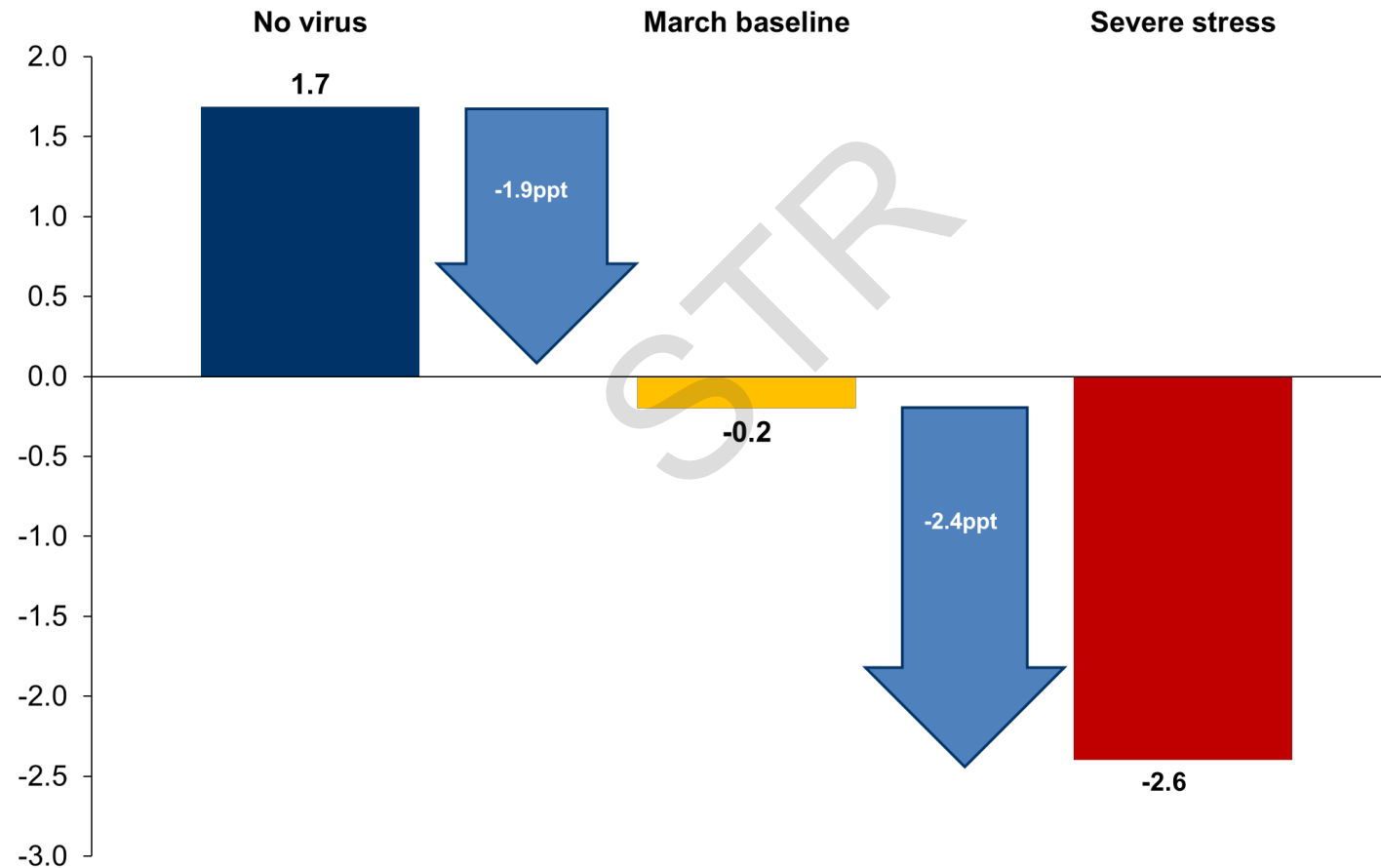
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The outlook could potentially worsen

US GDP growth in 2020

% average



Source : Oxford Economics

Forecast as of March 30

Key Performance Indicator Outlook (% Change vs. Prior Year)

U.S. Outlook		
Metric	2020 Forecast	2021 Forecast
Supply	-14.9	+15.6
Demand	-51.2	+81.8
Occupancy	-42.6	+57.3
ADR	-13.9	+3.7
RevPAR	-50.6	+63.1

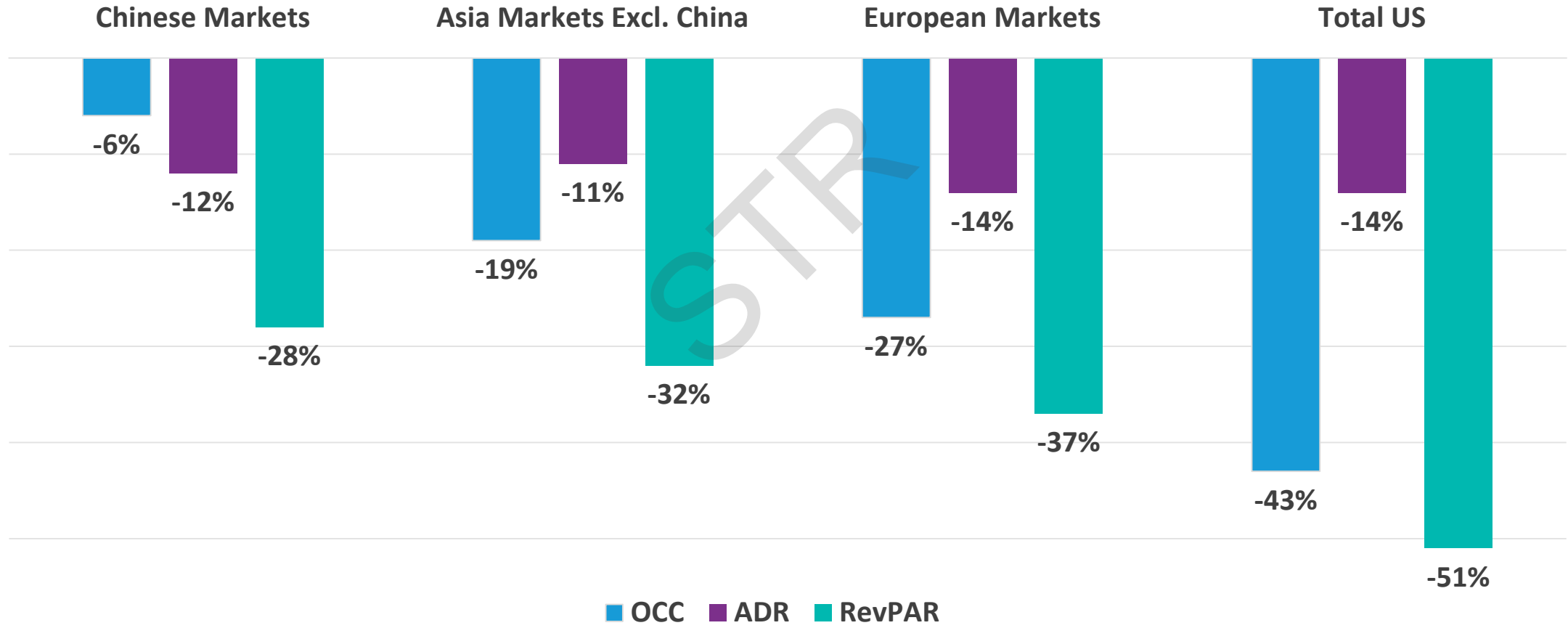
Forecast as of March 30

Key Performance Indicator Outlook (Absolute Values)

U.S. Outlook			
Metric	2019	2020 <i>Forecast</i>	2021 <i>Forecast</i>
Occupancy	66.1%	37.9%	59.7%
ADR	\$131	\$113	\$117
RevPAR	\$87	\$43	\$70

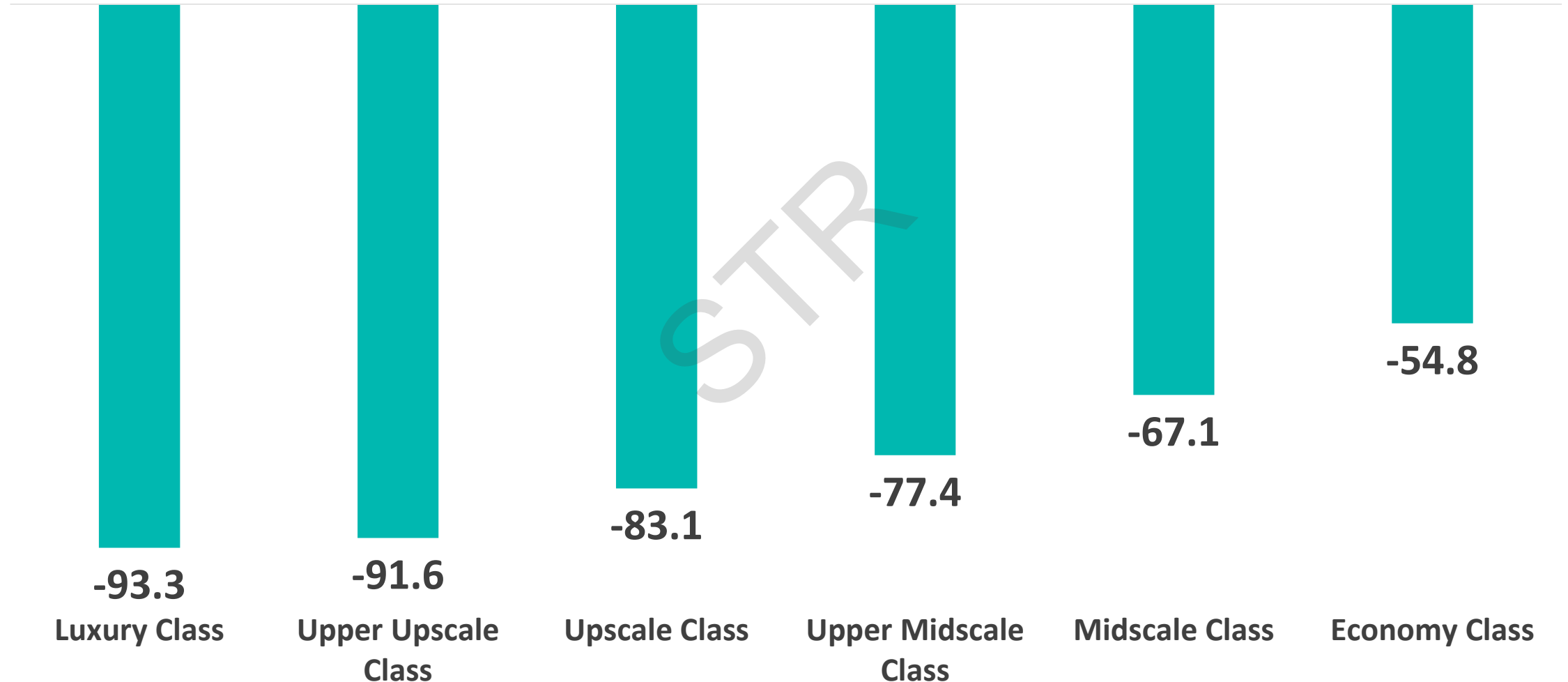
2020 Forecast by region

Average 2020 RevPAR % Chg, March 2020



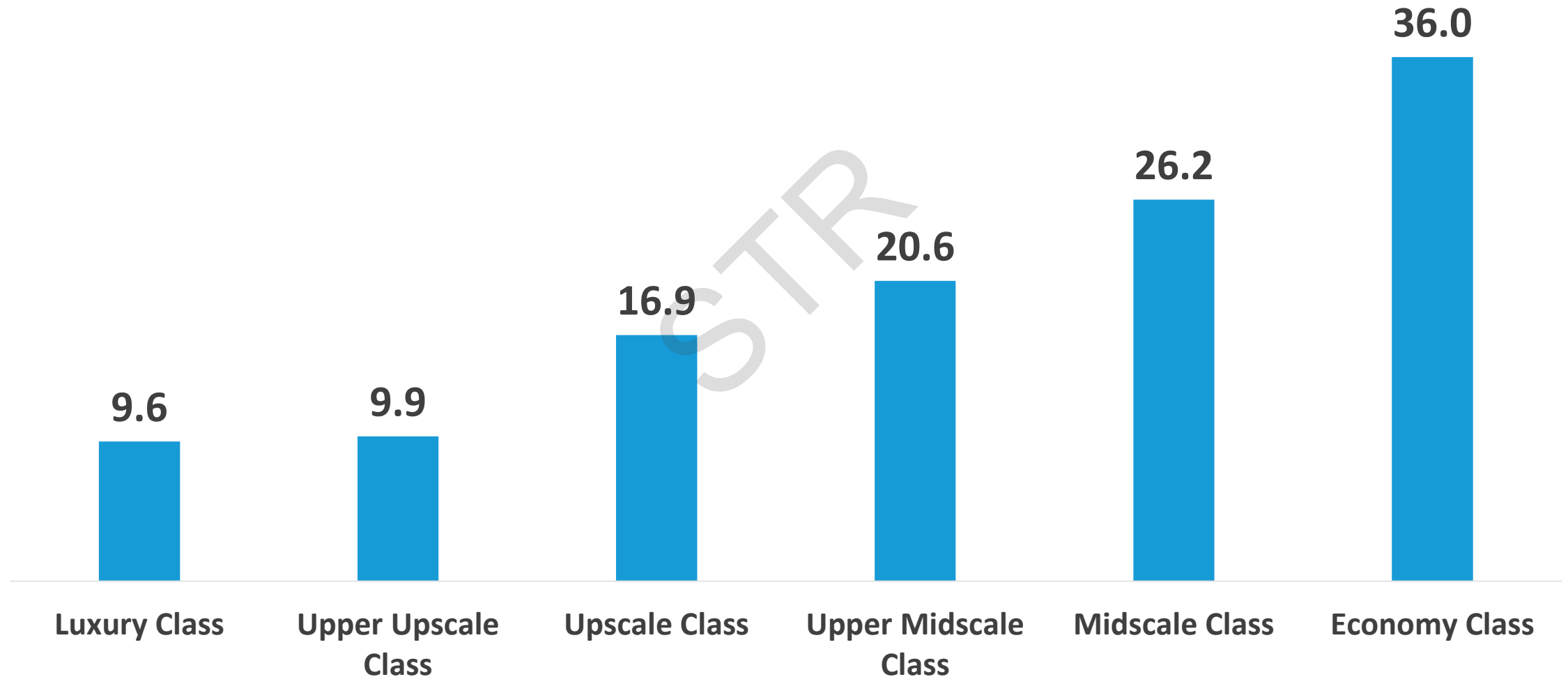
Class Performance: Almost -100% At The Upper End

Total U.S., RevPAR % Change, week ending March 28



Class Performance: Single Digit (!!!) Occupancy

Total U.S., Occupancy %, week ending March 28



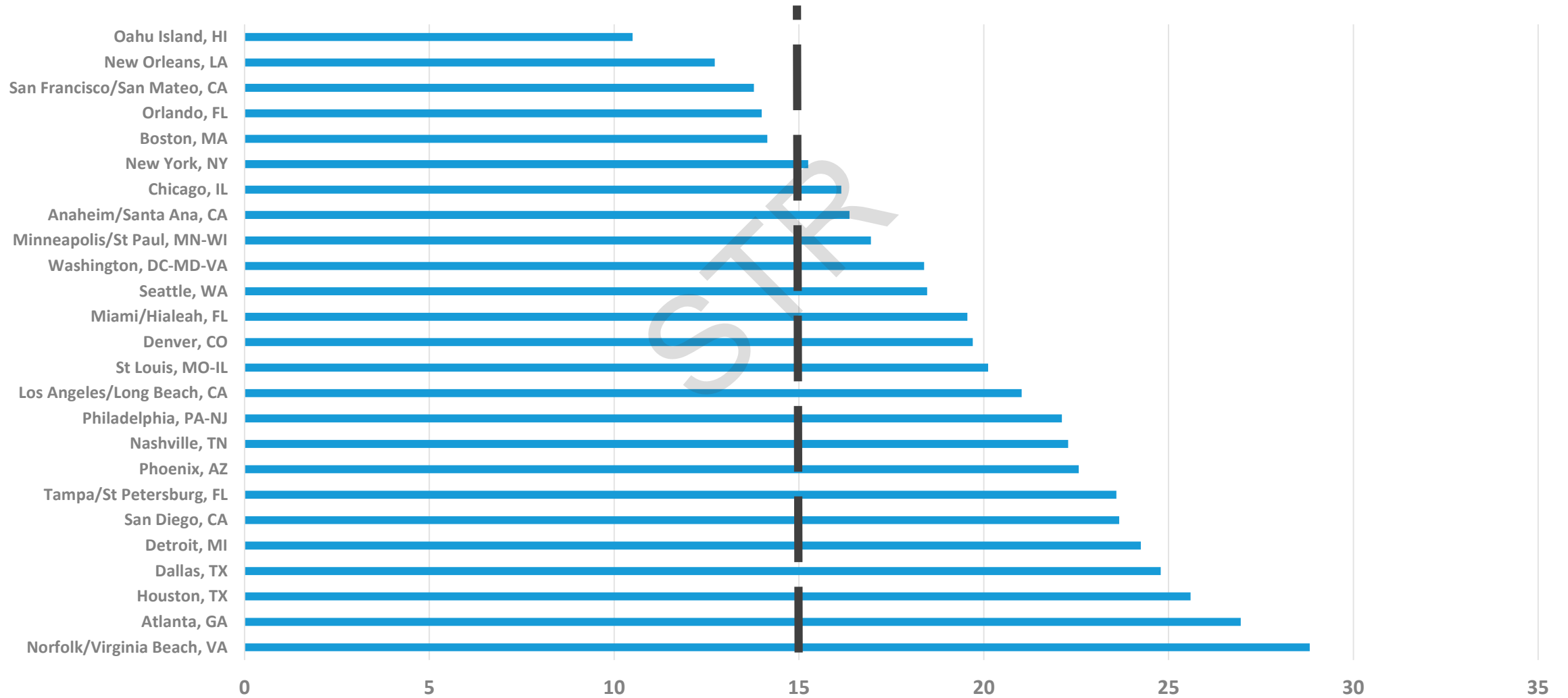
Location Performance: Resorts Lose Over 90%

Total U.S., RevPAR % Change, week ending March 28



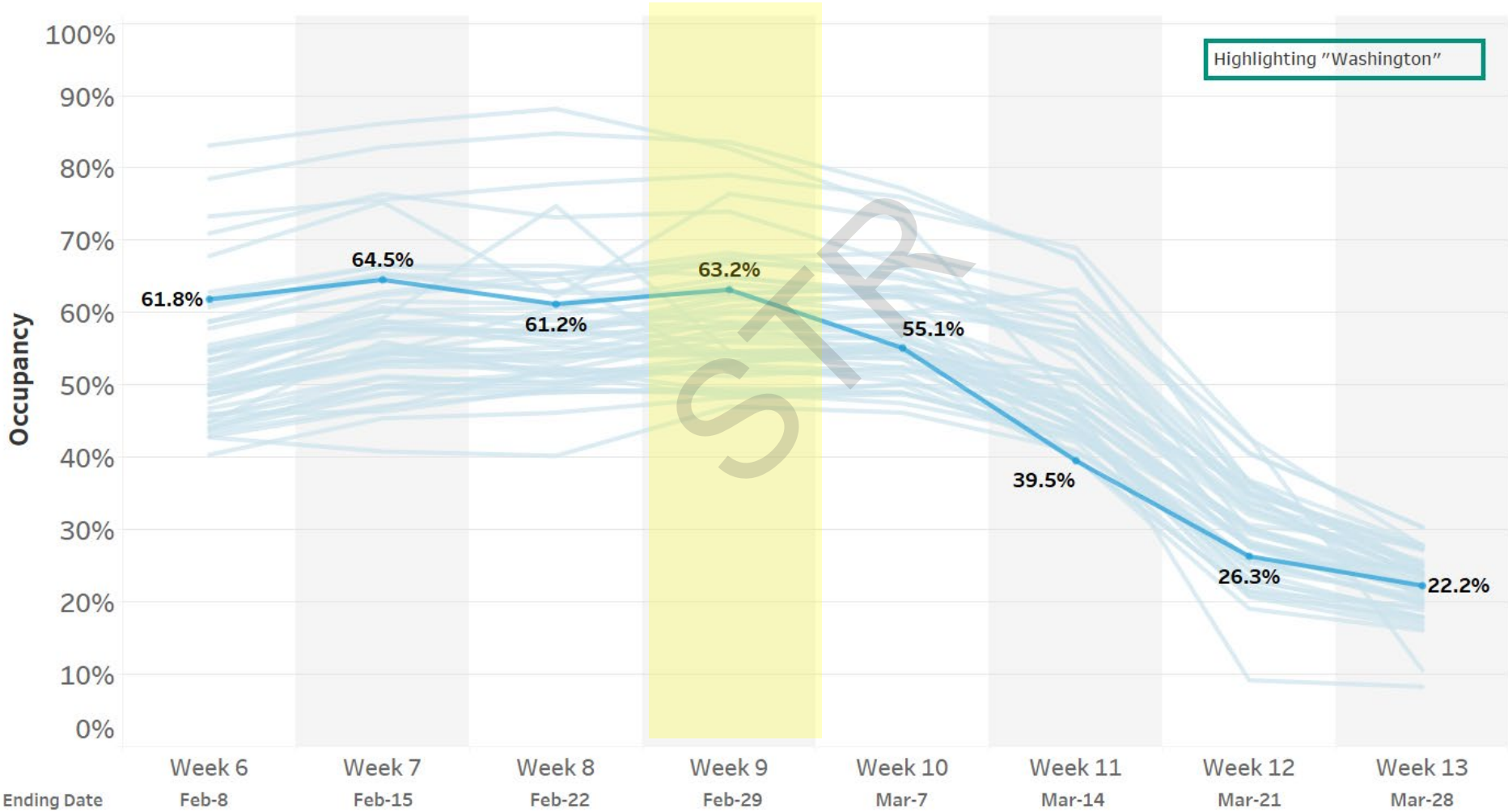
Top 25: 5 Markets With Occupancy Under 15%

Occupancy %, Week end March 28



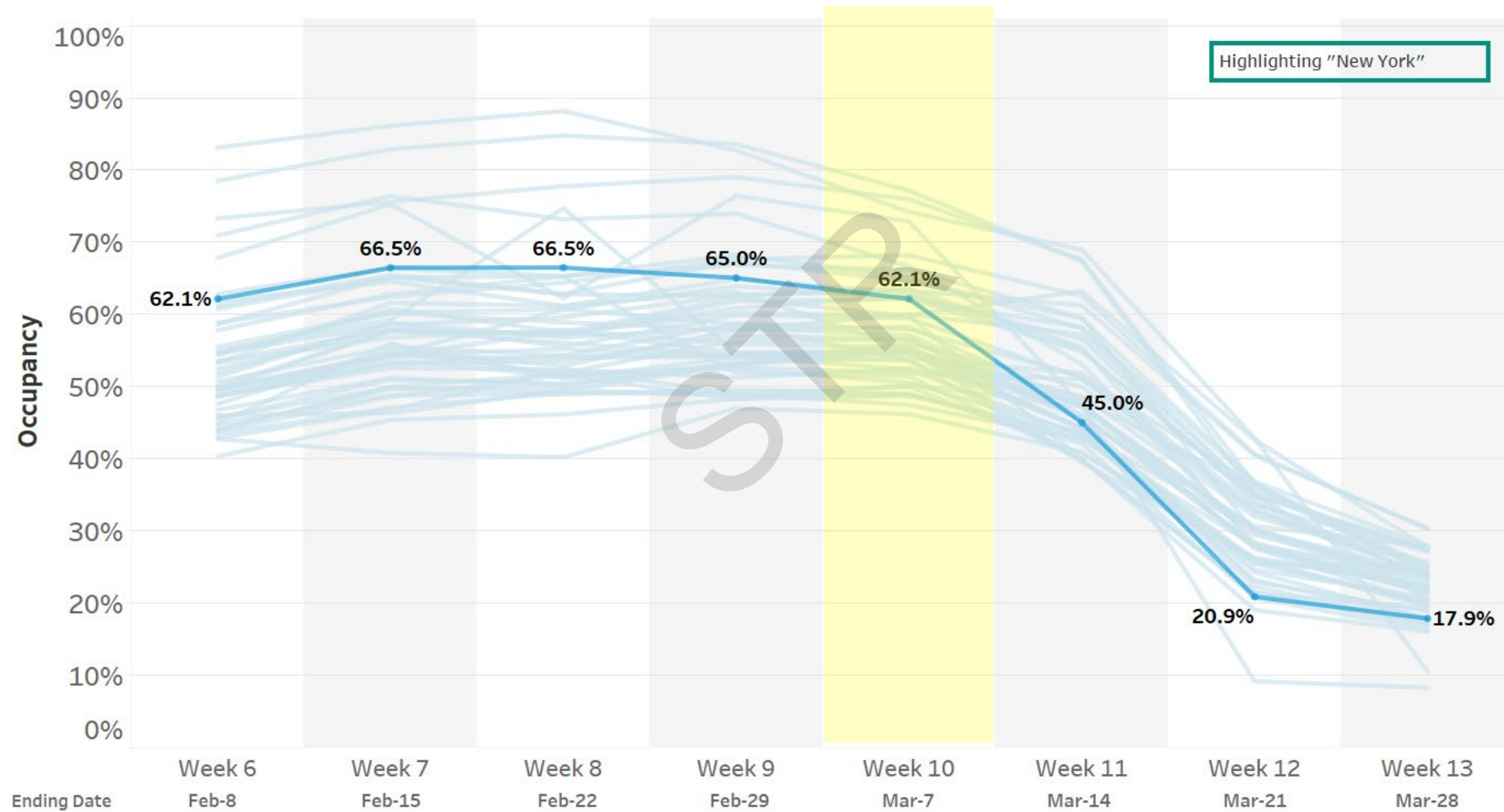
State Occupancy: WA

Occupancy %, by State, by week



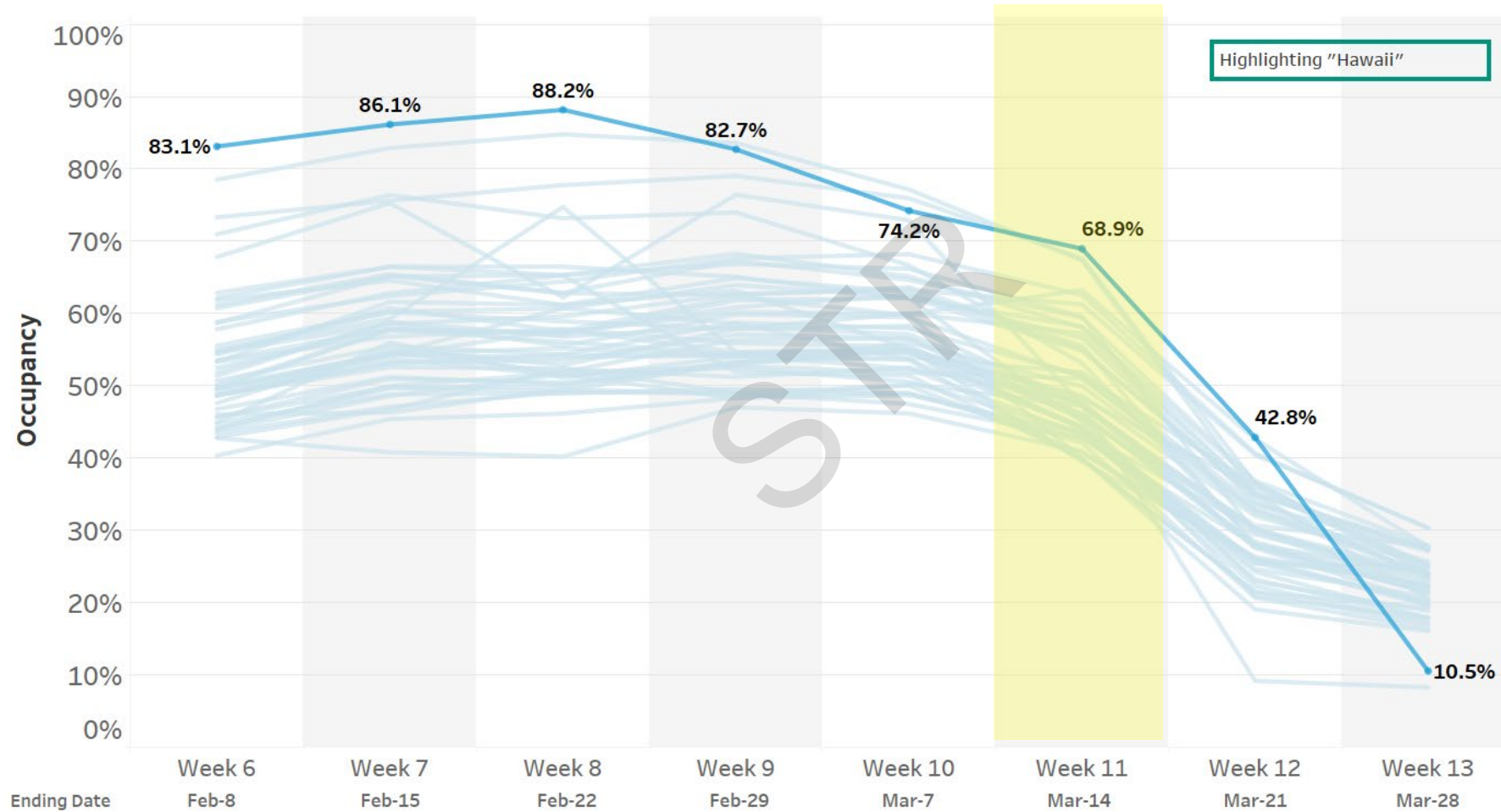
State Occupancy: NY

Occupancy %, by State, by week



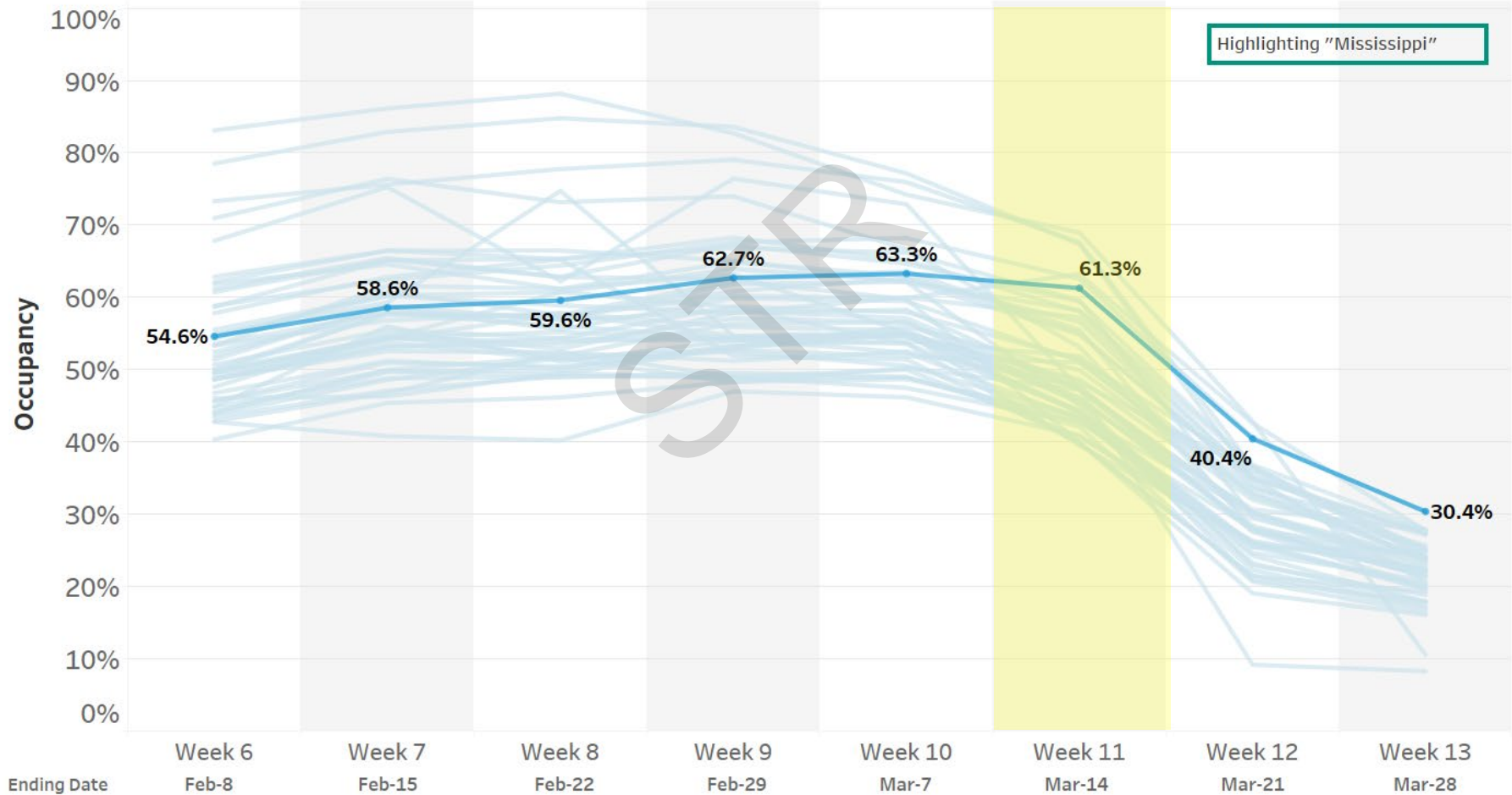
State Occupancy: HI

Occupancy %, by State, by week

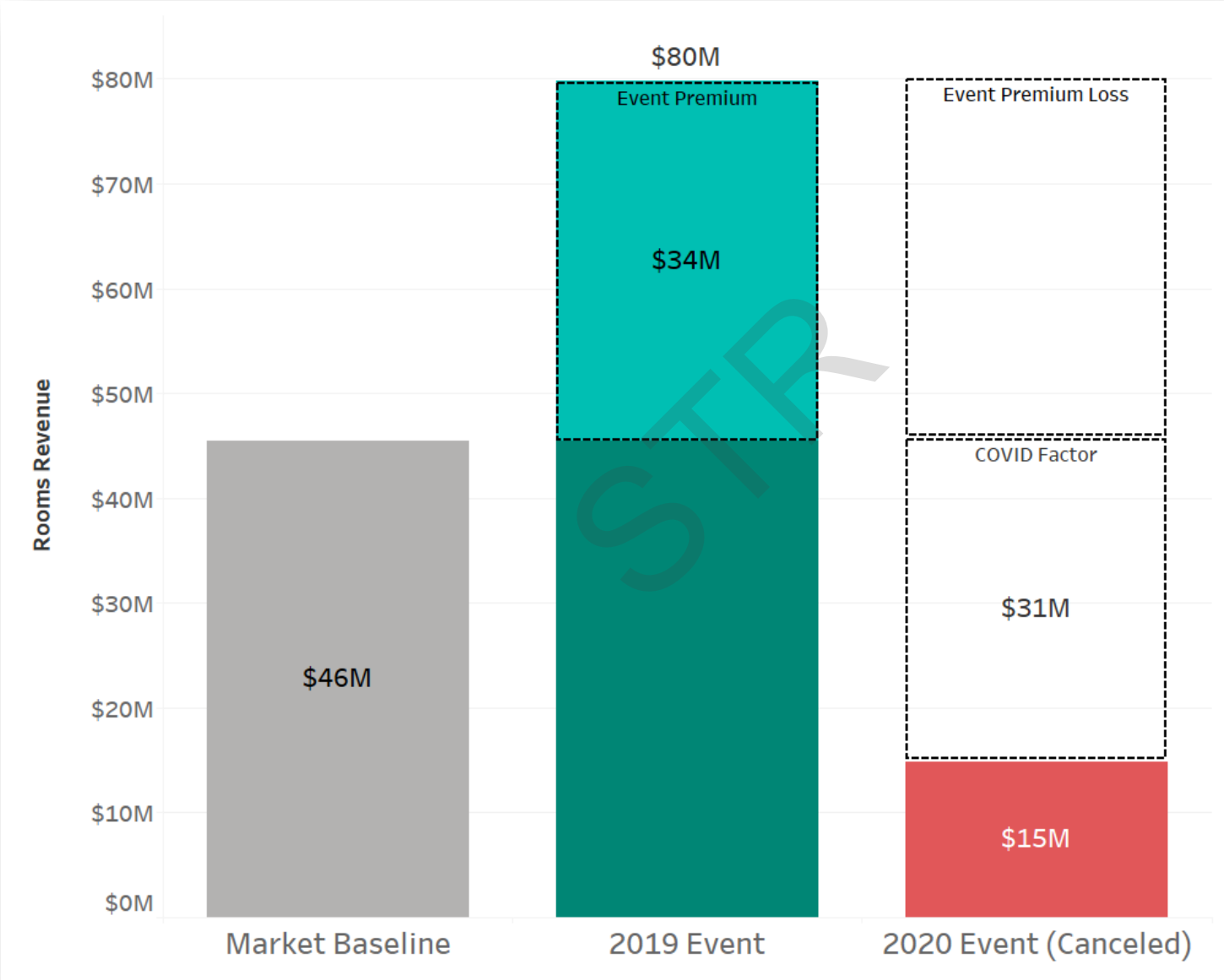


State Occupancy: MS

Occupancy %, by State, by week



SXSW Austin Event Cancellation Analysis

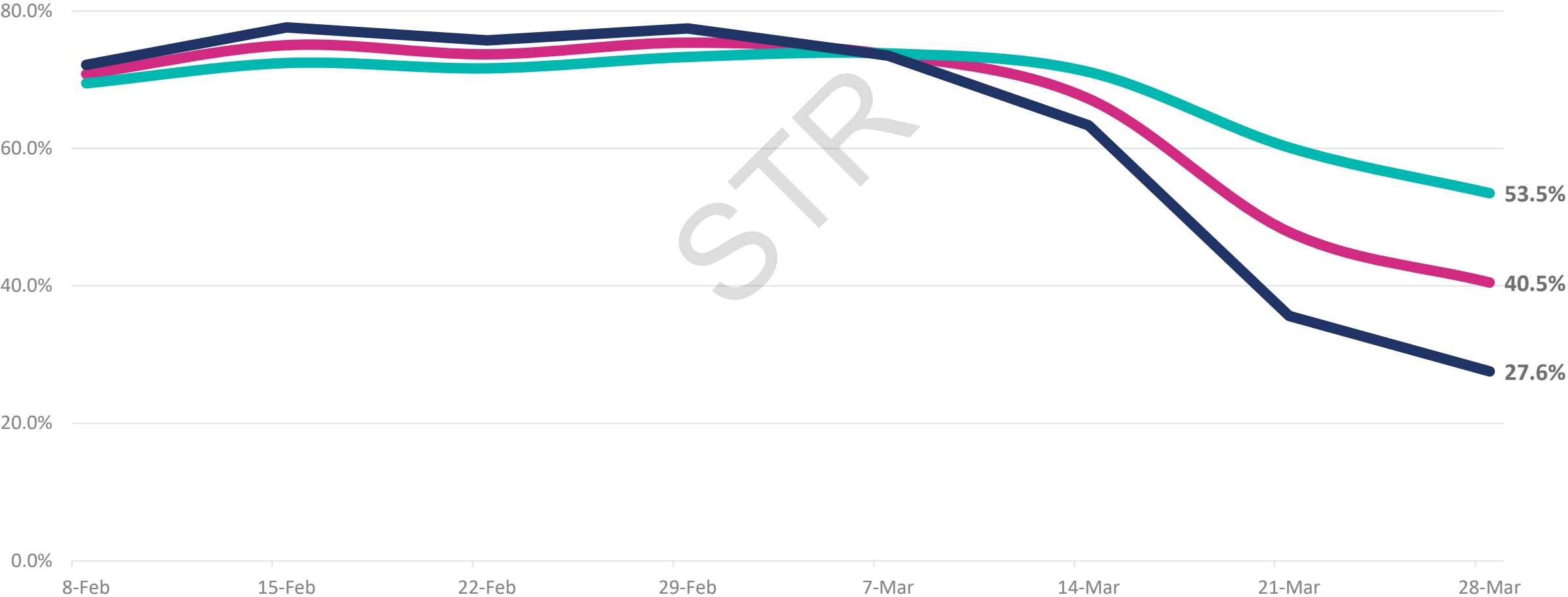


Extended Stay Brands Are Holding On To Occupancy

Absolute Occ %, Extended Stay

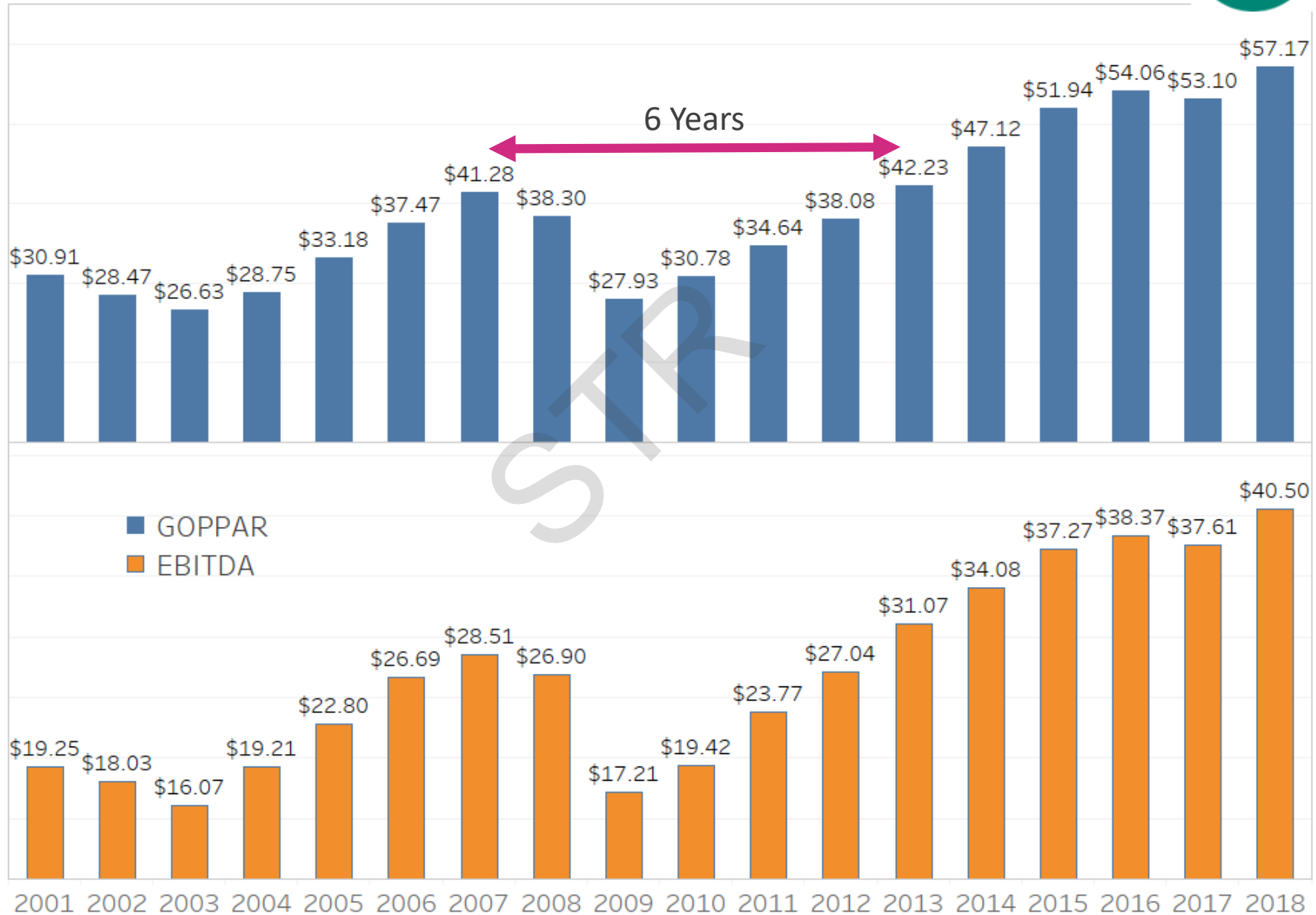


All Extended Stay Extended Stay - Lower Segment Extended Stay - Upper Segment



U.S. Hotel Gross Operating Profit & EBITDA

Per-Available-Roomnight





Canada Results

Moving From Bad To Worse

Total CAN RevPAR % Change, Week ending March 28



-82.1%

Most Hotels Are Empty

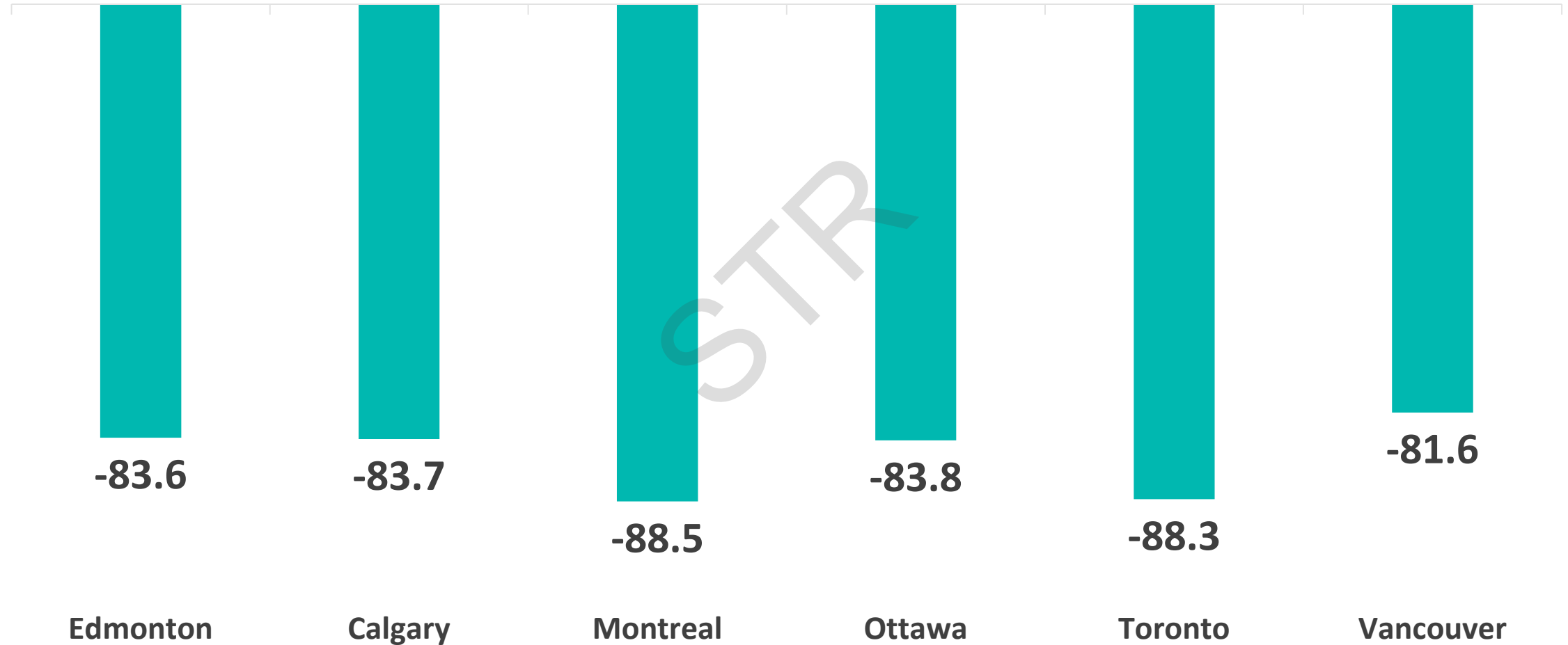
Total CAN Occupancy %, Week ending March 28



14.8%

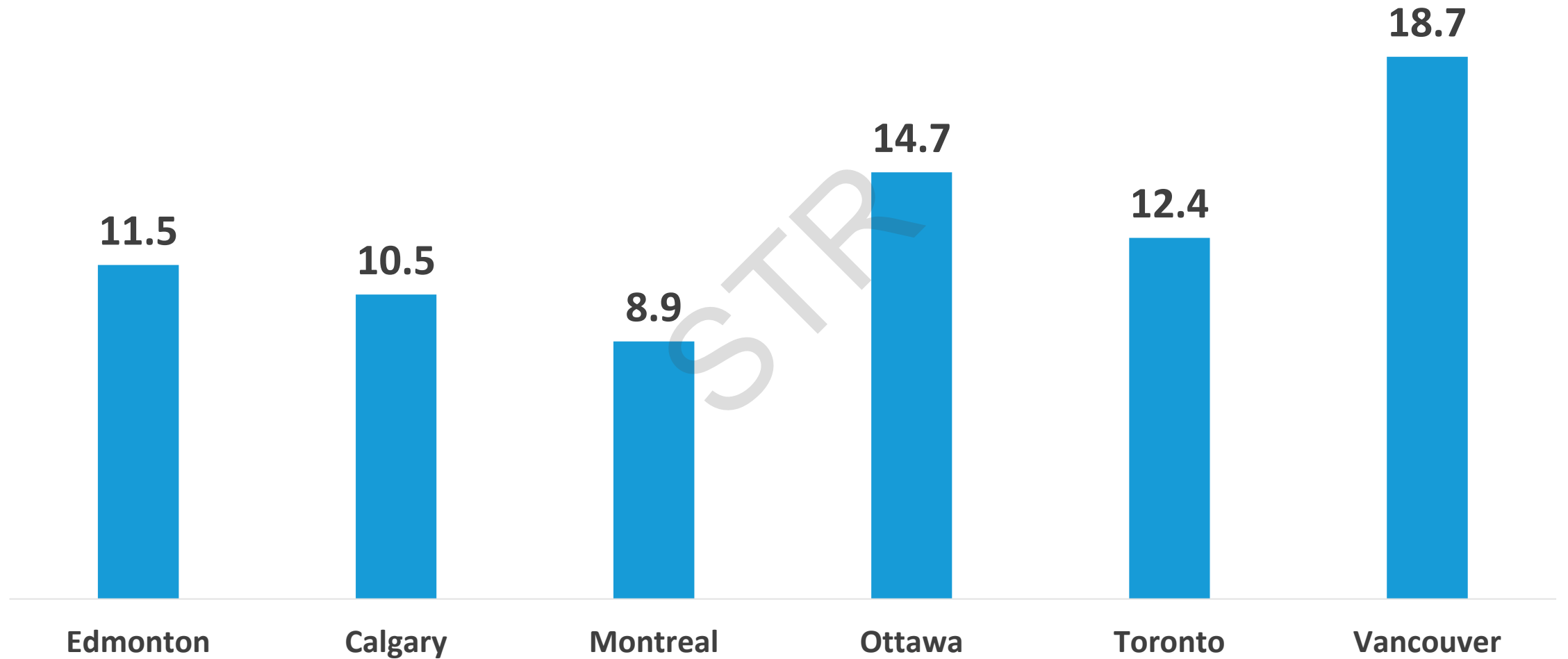
Market Performance: Continued Rapid Declines

Total CAN, RevPAR % Change, week ending March 28



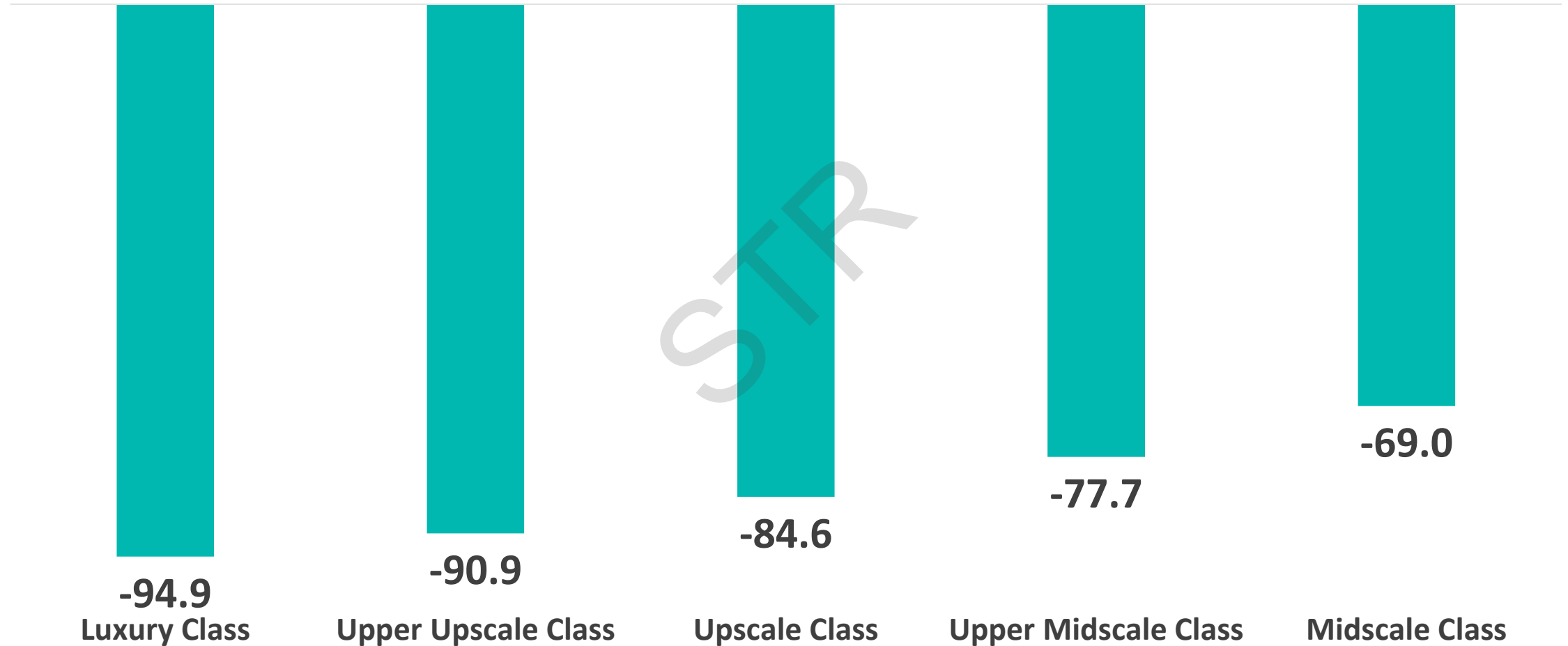
Market Performance: Dismal

Total CAN, Occupancy %, week ending March 28



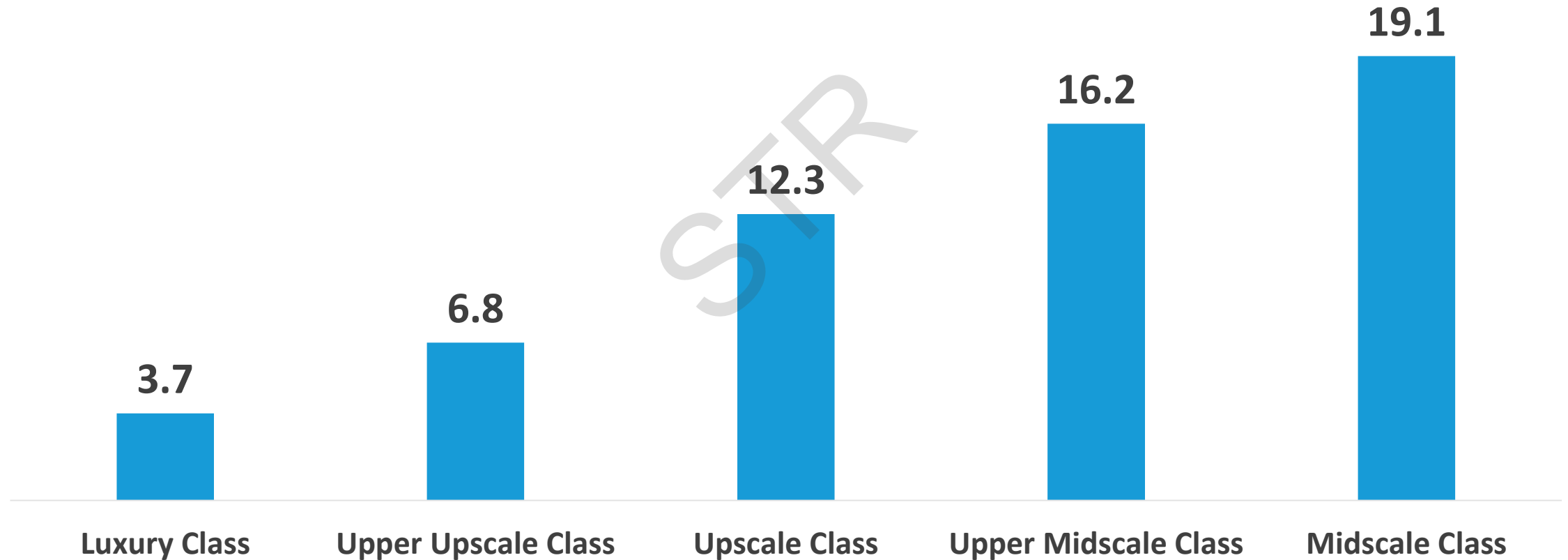
Class Performance: High End Hotels Down Almost -100%

Total CAN, RevPAR % Change, week ending March 28



Class Occupancy %: Sub-4% For Luxury Hotels

Total CAN , Week ending March 28



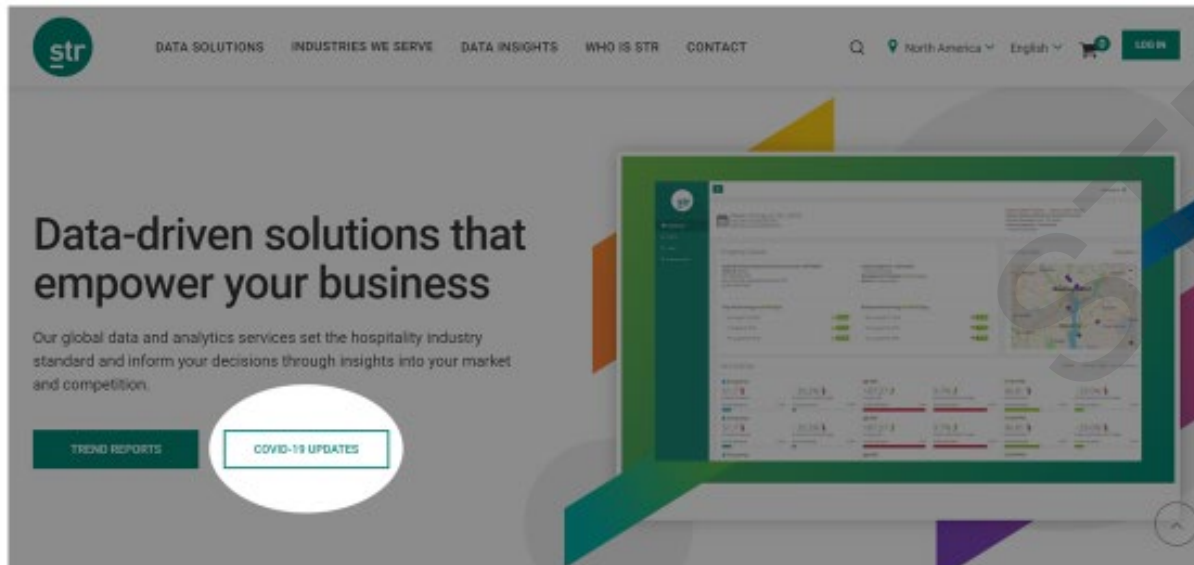
Resources



[str.com](https://www.str.com)

STR.com (COVID-19 landing page)

Analysis blogs, webinar recordings, press releases, etc.



[hotelnewsnow.com](https://www.hotelnewsnow.com)



info@str.com



Every Thursday
2:00 p.m. CDT

Webinar: Impact of the COVID-19 outbreak on the U.S. hotel industry

Speaker: Jan Freitag, Senior Vice President - Lodging Insights - STR



Now this is not the end.
It is not even the beginning of the end.
But it is, perhaps, the end of the beginning.
Winston Churchill

November 10, 1942

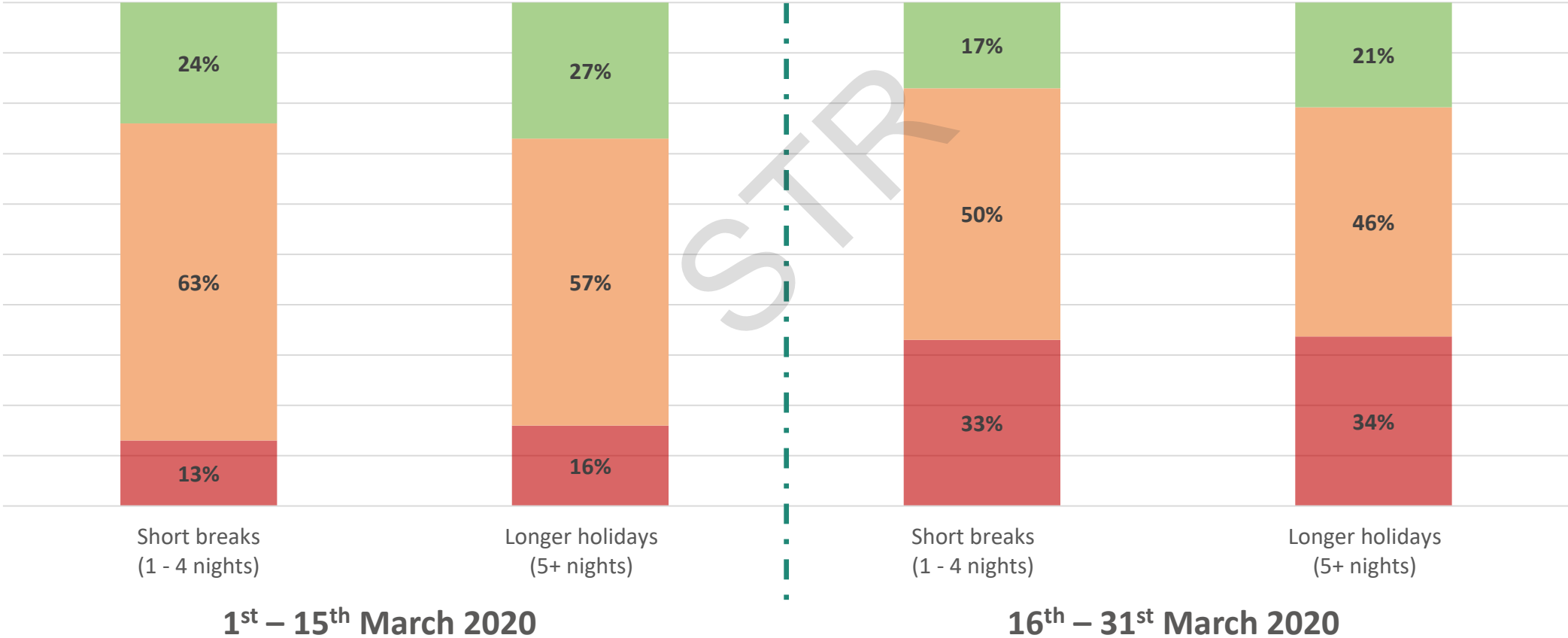
<http://www.churchill-society-london.org.uk/>

Tourism spending intent has lessened significantly



Propensity to spend in next 12 months vs. previous 12 months

Less The Same More



Q: Thinking about the next 12 months in comparison to the last 12 months, would you say you're more likely to spend less, the same or more money on the following...
 Method: Online survey conducted among global sample of respondents who have traveled for international leisure purposes (STR Traveler Panel).



Thank you



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