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Mercredi, 28 Août 2013 00:00 -

HENDERSONVILLE, TENNESSEE - The U.S. hotel industry reported positive results in the three key performance metrics during July 2013, according to data from **STR Global**.

Overall, the U.S. hotel industry's occupancy rose 1.7 percent to 71.1 percent, its average daily rate was up 4.1 percent to US\$112.18 and its revenue per available room increased 5.8 percent to US\$79.73.

*"The third quarter got off to a good start with July RevPAR up 5.8 percent, driven primarily by ADR," said **Bobby Bowers**, senior VP of operations at STR. "Occupancy hit 71.1 percent, the highest July industry occupancy rate since 2006. The July numbers were boosted by one less Sunday in the month versus 2012, after June's numbers were negatively impacted by similar calendar-related issues. July year-to-date RevPAR growth of 5.6 percent remains on track to achieve STR's current full-year 2013 forecast of 5.8 percent."*

Among the Top 25 Markets, Houston, Texas, reported the largest occupancy increase, rising 8.2 percent to 70.1 percent. Denver, Colorado, followed with a 6.8-percent increase to 84.4 percent. New Orleans, Louisiana, posted the largest occupancy decrease, falling 6.6 percent to 63.8 percent.

Two markets achieved double-digit ADR increases: Houston (+14.1 percent to US\$99.50) and Oahu Island, Hawaii (+13.4 percent to US\$221.42). Washington, D.C., reported the only ADR decrease in July, falling 1.6 percent to US\$131.45.

Houston led the RevPAR growth, rising 23.5 percent to US\$69.74, followed by Nashville, Tennessee (+13.2 percent to US\$73.22), and Seattle, Washington (+12.6 percent to US\$125.36). Washington, D.C. (-7.0 percent to US\$97.50), and New Orleans (-5.5 percent to US\$75.45) ended the month with the largest RevPAR decreases.

The Americas region recorded positive results in the three key performance metrics when reported in U.S. dollars during July 2013, according to data compiled by STR and STR Global.

Compared to July 2012, the Americas region reported a 1.7-percent monthly increase in occupancy to 71.0 percent, a 3.8-percent monthly increase in average daily rate to US\$114.07 and a 5.5-percent monthly growth in revenue per available room to US\$80.97.

Among the key markets in the region, Vancouver, Canada (+5.9 percent to 85.1 percent), and Buenos Aires, Argentina (+5.3 percent to 58.5 percent), reported the largest occupancy increases for the month. Rio de Janeiro, Brazil, posted the largest occupancy decrease, falling 8.5 percent to 70.0 percent. Panama City, Panama, followed with an 8.1-percent decrease to 50.0 percent.

San Francisco, California, achieved the largest ADR increase, rising 9.0 percent to US\$192.13. Chicago, Illinois, followed with an 8.4-percent increase to US\$131.16. Toronto, Canada, fell 6.4 percent in ADR to US\$129.20, reporting the largest decrease in that metric.

San Francisco (+11.3 percent to US\$171.75) and Chicago (+10.2 percent to US\$102.17) also

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led with double-digit RevPAR growth. Panama City (-11.6 percent to US\$54.34) and Sao Paulo, Brazil (-10.3 percent to US\$83.17), posted the largest RevPAR decreases.

The European hotel industry posted mixed results in year-over-year metrics when reported in U.S. dollars, Euros and British pounds for July 2013, according to data compiled by STR Global.

*"Europe is posting quite positive demand growth in 2013", said **Elizabeth Winkle**, managing director of STR Global.*

"Year-to-date, on a 12-month moving average, the region is achieving record demand levels (1,038,703,967 rooms sold). This is the highest actual demand they have ever achieved since STR Global has been tracking hotel performance in Europe (back to 2000). Year-to-date supply remains at a one-percent growth level and average daily rate is still a bit weak, when compared to YTD 2012. In July ADR fell 5.5 percent; the sharpest ADR decrease the region has seen since the financial crisis. Ramadan was in July this year, which had a negative impact on hotel performance, especially since last July was also strong. The euro is still quite strong compared to the pound and U.S. dollar which reduces spending power and limits hoteliers' ability to increase their rates".

Highlights from key market performers for July 2013 include (year-over-year comparisons, all currency in Euros):

- Athens, Greece, reported the only double-digit occupancy increase, rising 16.9 percent to 70.6 percent.
- Istanbul, Turkey, fell 29.6 percent in occupancy to 50.5 percent, reporting the largest decrease in that metric.
- Vilnius, Lithuania, rose 15.6 percent in ADR to 59.66 euros, achieving the largest increase in that metric.
- London, United Kingdom (-23.5 percent to 165.14 euros), and Istanbul (-15.5 percent to 141.06 euros), posted the largest ADR decreases for the month.
- Six markets experienced RevPAR growth of more than 10 percent: Athens (+15.2 percent to 66.50 euros); Edinburgh (+14.0 percent to 101.54 euros); Lisbon, Portugal (+13.7 percent to 60.07 euros); Vilnius (+12.4 percent to 45.68 euros); Bratislava, Slovakia (+11.0 percent to 31.83 euros); and Copenhagen, Denmark (+10.5 percent to 79.76 euros).
- Istanbul fell 40.5 percent in RevPAR to 71.29 euros, reporting the largest decrease in that metric.

The Middle East/Africa region reported mixed performance results during July 2013 when reported in U.S. dollars, according to data compiled by STR Global. The region reported a 13.5-percent decrease in occupancy to 49.0 percent, a 5.6-percent increase in average daily rate to US\$147.82 and an 8.6-percent decrease in revenue per available room to US\$72.37.

"The timing of Ramadan in July, coupled with the ongoing unrest issues in the Middle East/Africa region have had a negative impact on hotel performance", said Elizabeth Winkle. "Northern Africa was impacted by the recent overthrow of President Morsi and violent clashes between his supporters and opposition in Egypt; Cairo only achieved 16.6-percent occupancy rate this month. However, in Africa, Cape Town and Nairobi posted positive results as these

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markets are not impacted by Ramadan as much as the markets in the Middle East are. For the total region, average occupancy in the region is less than 50 percent. However, overall year-to-date the performance in the region is still positive”

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Highlights among the region's key markets for July 2013 include (year-over-year comparisons, all currency in U.S. dollars):

- Doha, Qatar (+9.5 percent to 48.2 percent), and Nairobi, Kenya (+0.8 percent to 65.1 percent), reported the only occupancy increases for the month.
- Cairo, Egypt, fell 60.1 percent in occupancy to 16.6 percent, posting the largest decrease in that metric.
- Jeddah, Saudi Arabia, rose 13.0 percent in ADR to US\$258.81, achieving the only double-digit increase in that metric.
- Beirut, Lebanon (-20.2 percent to US\$157.03), and Sandton, South Africa, and the surrounding areas (-11.0 percent to US\$110.37), reported the only double-digit ADR decreases.
- Jeddah (+6.3 percent to US\$203.68) and Doha (+2.5 percent to US\$83.96) experienced the only RevPAR increases in July.
- Cairo fell 62.0 percent in RevPAR to US\$16.68, reporting the largest decrease in that metric, followed by Beirut with a 43.5-percent decrease to US\$60.73.

Consultez la source sur Veille info tourisme: [STR hotel performance - july 2013 - Performance de l'industrie hôtelière internationale - juillet 2013](#)