

# Hospitality Directions **US**

January 2014

## Our updated lodging outlook

### Highlights

Lodging's recovery continues, with strong demand growth and rising room rates. Construction activity remains below historical averages, but is picking up.

Our outlook for 2014 anticipates:

- RevPAR growth of 6.0%, primarily driven by stronger ADR.
- Demand growth of 2.4%.
- Increased hotel construction starts, but supply growth of 1.0%, still well below the long-term average of 1.5%.
- Accelerating gains in hotel pricing, with ADR rising 4.3% compared to 3.9% in 2013.
- Strongest performance gains in the higher-priced chain-scale segments, particularly luxury.

Our outlook assumes stronger economic growth, as fiscal headwinds ease and the underlying momentum of the recovery shows through. We assume GDP growth of 2.1% in 2014 (Q4/Q4 basis).

### Room rate gains accelerate, aided by strong occupancy and below average supply growth

Continued recovery in lodging demand and gathering economic momentum supports our expectations for hotel performance in 2014. The lodging cycle is in a favorable stage, with above average occupancy levels and demand growth that continues to outpace hotel openings. Stronger gains in ADR are expected as revenue management tactics gain traction, and we expect RevPAR growth to accelerate to 6.0% in 2014. As a milestone in the recovery, by the fourth quarter of 2014 we expect real, seasonally adjusted RevPAR will recover to the peak reached in the fourth quarter of 2007 at the onset of the economic recession.

Our updated lodging outlook incorporates recent hotel performance—strong demand growth in the fourth quarter, albeit with somewhat slower ADR gains—and a macroeconomic context that is more clear. Hotel construction activity is rebounding from a low base. Our outlook for supply continues to anticipate 1.0% growth, but with fourth quarter room starts up solidly (44.1% ahead of prior year), the pipeline for 2015 openings is expanding. In the current economic cycle, hotels in the luxury, upper upscale and upscale chain scales have recovered occupancy levels more quickly and are now experiencing greater gains in ADR. In particular, luxury hotels are on track to reach 75.0% occupancy in 2014, and upper upscale hotels are anticipated to benefit from a gradual recovery in group activity and reach 72.7%.

### Economic momentum gains, boosting expectations for travel

Underlying the effects of fiscal drag, the economy showed greater than anticipated momentum last year. Macroeconomic Advisers now anticipates GDP grew above-trend during 2013 (2.6%), and expects growth to improve to 3.1% in 2014. In the leisure segment, travel growth is expected to be supported by recent gains in household wealth (up \$9.7 trillion in 2013, or 13.7%), reduced household deleveraging, and waning effects of the adjustment to higher income taxes. In the business segment, the lingering uncertainty that restrained business investment spending is ebbing and confidence is building. Downside risks have eased some with the signing of the two-year Federal budget, better prospects for Eurozone recovery, less concern of a hard-landing in China, and lower risk of a wider conflict in the Middle East.

# Hospitality Outlook 2014 2018 Pwc

**K Morrison**



## **Hospitality Outlook 2014 2018 Pwc:**

The book delves into Hospitality Outlook 2014 2018 Pwc. Hospitality Outlook 2014 2018 Pwc is an essential topic that must be grasped by everyone, ranging from students and scholars to the general public. This book will furnish comprehensive and in-depth insights into Hospitality Outlook 2014 2018 Pwc, encompassing both the fundamentals and more intricate discussions.

1. This book is structured into several chapters, namely:
  - Chapter 1: Introduction to Hospitality Outlook 2014 2018 Pwc
  - Chapter 2: Essential Elements of Hospitality Outlook 2014 2018 Pwc
  - Chapter 3: Hospitality Outlook 2014 2018 Pwc in Everyday Life
  - Chapter 4: Hospitality Outlook 2014 2018 Pwc in Specific Contexts
  - Chapter 5: Conclusion
2. In chapter 1, this book will provide an overview of Hospitality Outlook 2014 2018 Pwc. The first chapter will explore what Hospitality Outlook 2014 2018 Pwc is, why Hospitality Outlook 2014 2018 Pwc is vital, and how to effectively learn about Hospitality Outlook 2014 2018 Pwc.
3. In chapter 2, this book will delve into the foundational concepts of Hospitality Outlook 2014 2018 Pwc. This chapter will elucidate the essential principles that need to be understood to grasp Hospitality Outlook 2014 2018 Pwc in its entirety.
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5. In chapter 4, this book will scrutinize the relevance of Hospitality Outlook 2014 2018 Pwc in specific contexts. The fourth chapter will explore how Hospitality Outlook 2014 2018 Pwc is applied in specialized fields, such as education, business, and technology.
6. In chapter 5, this book will draw a conclusion about Hospitality Outlook 2014 2018 Pwc. This chapter will summarize the key points that have been discussed throughout the book.

The book is crafted in an easy-to-understand language and is complemented by engaging illustrations. It is highly recommended for anyone seeking to gain a comprehensive understanding of Hospitality Outlook 2014 2018 Pwc.

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