

Does Luxury Pay?

Comparisons and Trends behind the value

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Area Director Asia Pacific

LUXURY HOTELS WORLD | SYDNEY

2014 July 16





The world's leading Hospitality Benchmark company

Aggregating key hotel metrics into
valuable performance data

Global client base ~50,000 hotels
submitting performance data

Industry standard used by all major
hotel groups



Presentation is available for download

www.hotelnewsnow.com

Click on “Data Presentations”



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Global luxury performance

2

Regional luxury performance

3

Global brand performance

4

Pipeline

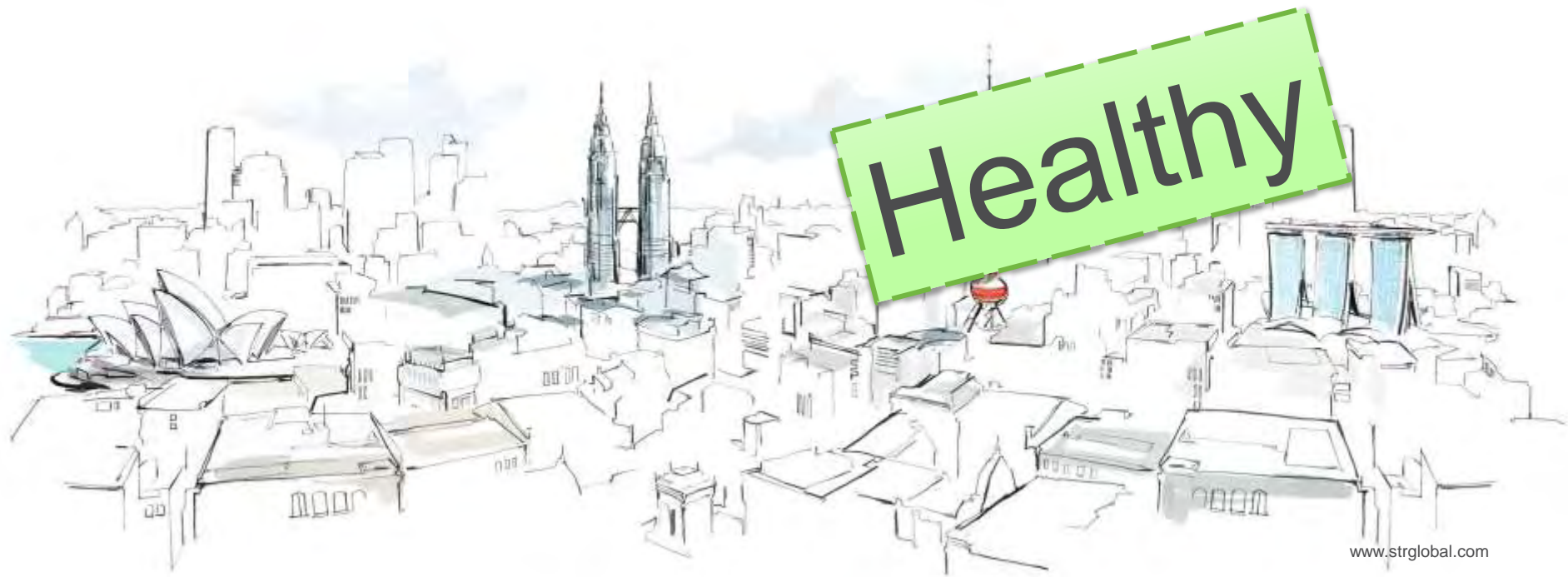
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Global capitals

6

Sydney focus

1. Global Luxury Performance

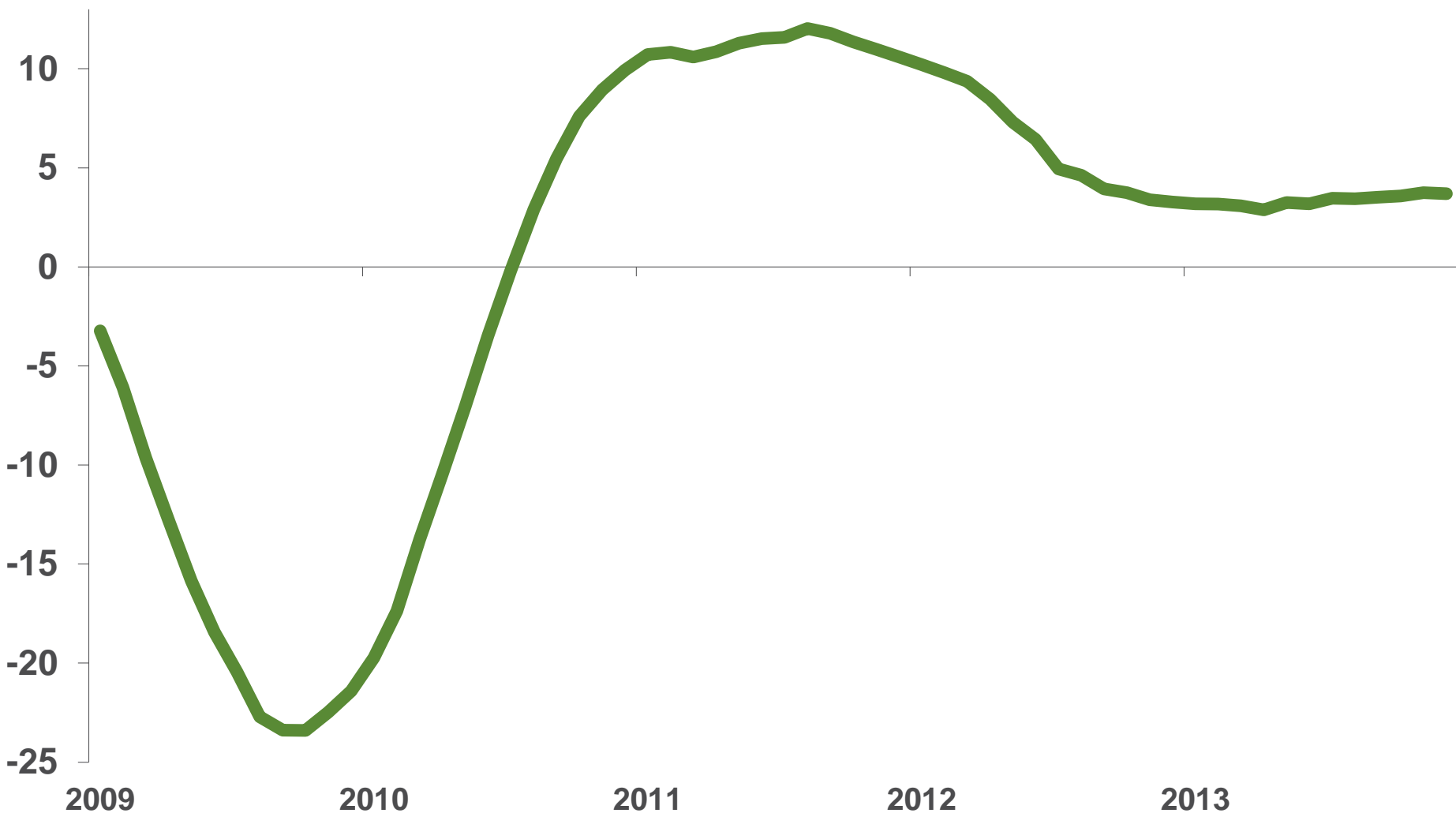


+3.7%

Global Luxury Class RevPAR % Change, US\$, 2013

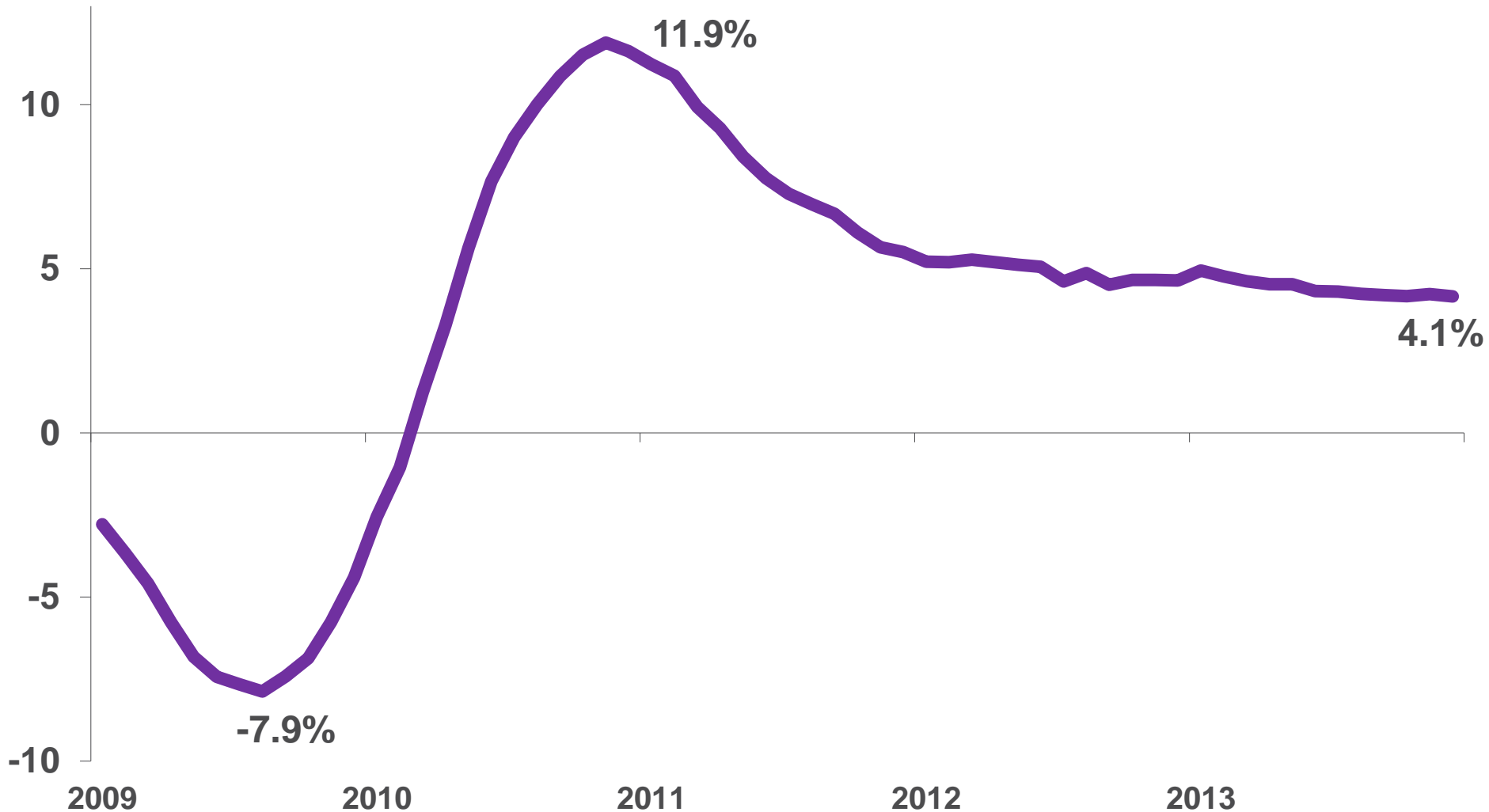
Global Luxury Hotels RevPAR Rebounds

Global Luxury Class, RevPAR % Change, 12 MMA 2009 – 2013



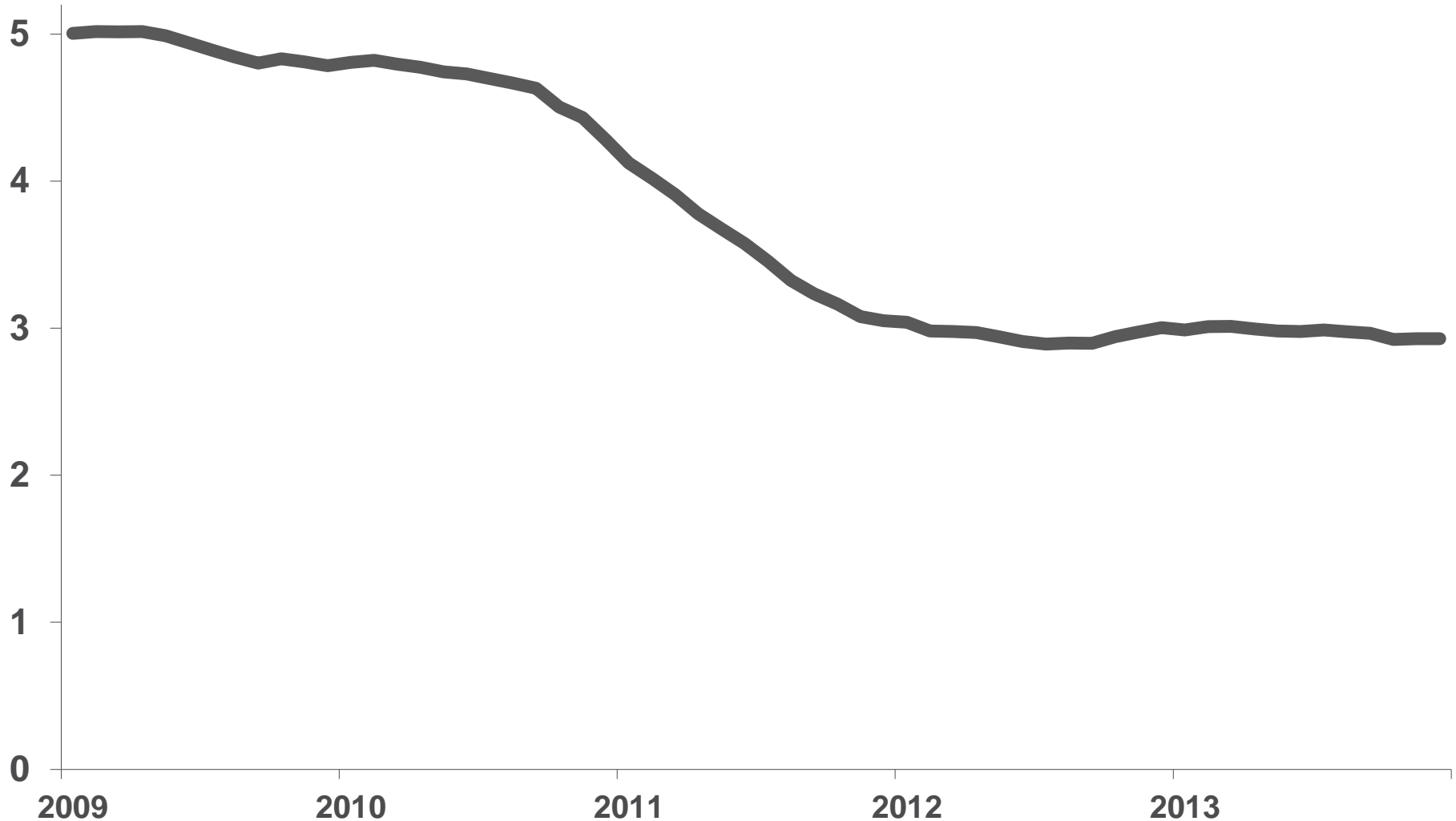
Global Demand For Luxury Hotels Holds Steady

Global Luxury Class, Demand % Change, 12 MMA 2009 – 2013



Global Luxury Supply Growth Still Strong

Global Luxury Class, Supply % Change, 12 MMA 2009 –2013



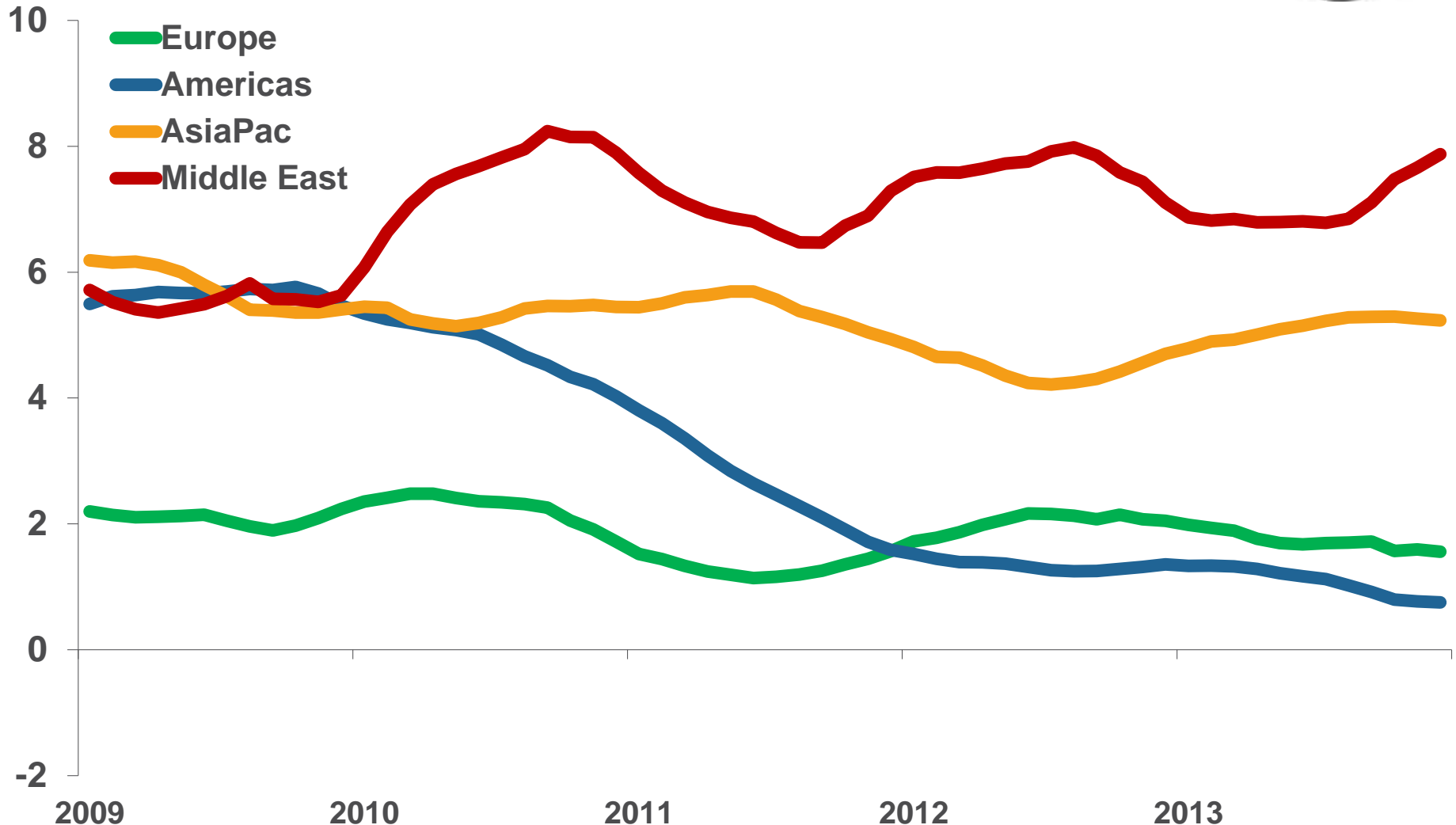
2. Regional Luxury Performance

A mixed bag



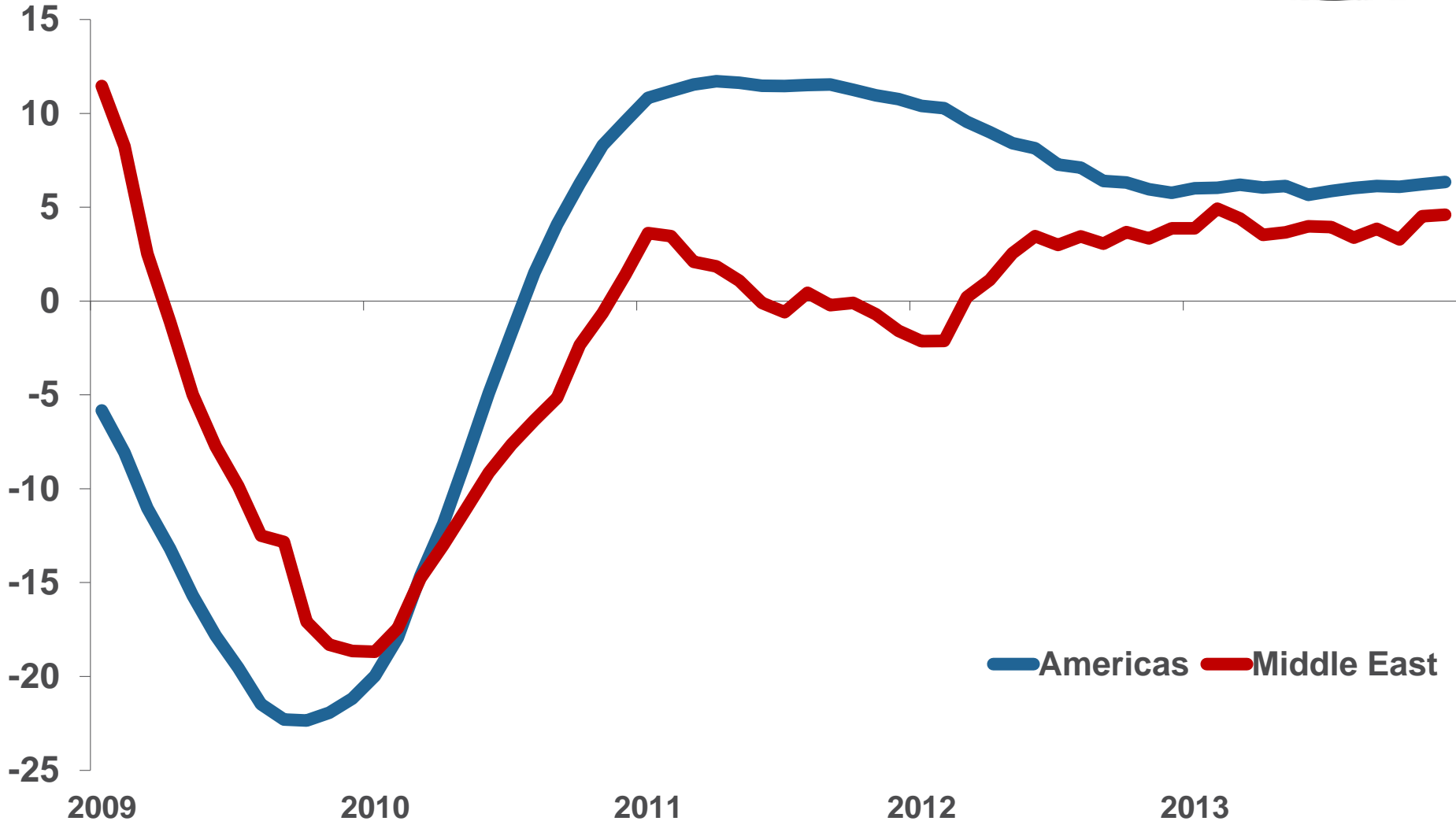
Supply Growth: Varies Widely by Region

Luxury Class, Supply % Change by Region, 12 MMA, 2009 – 2013



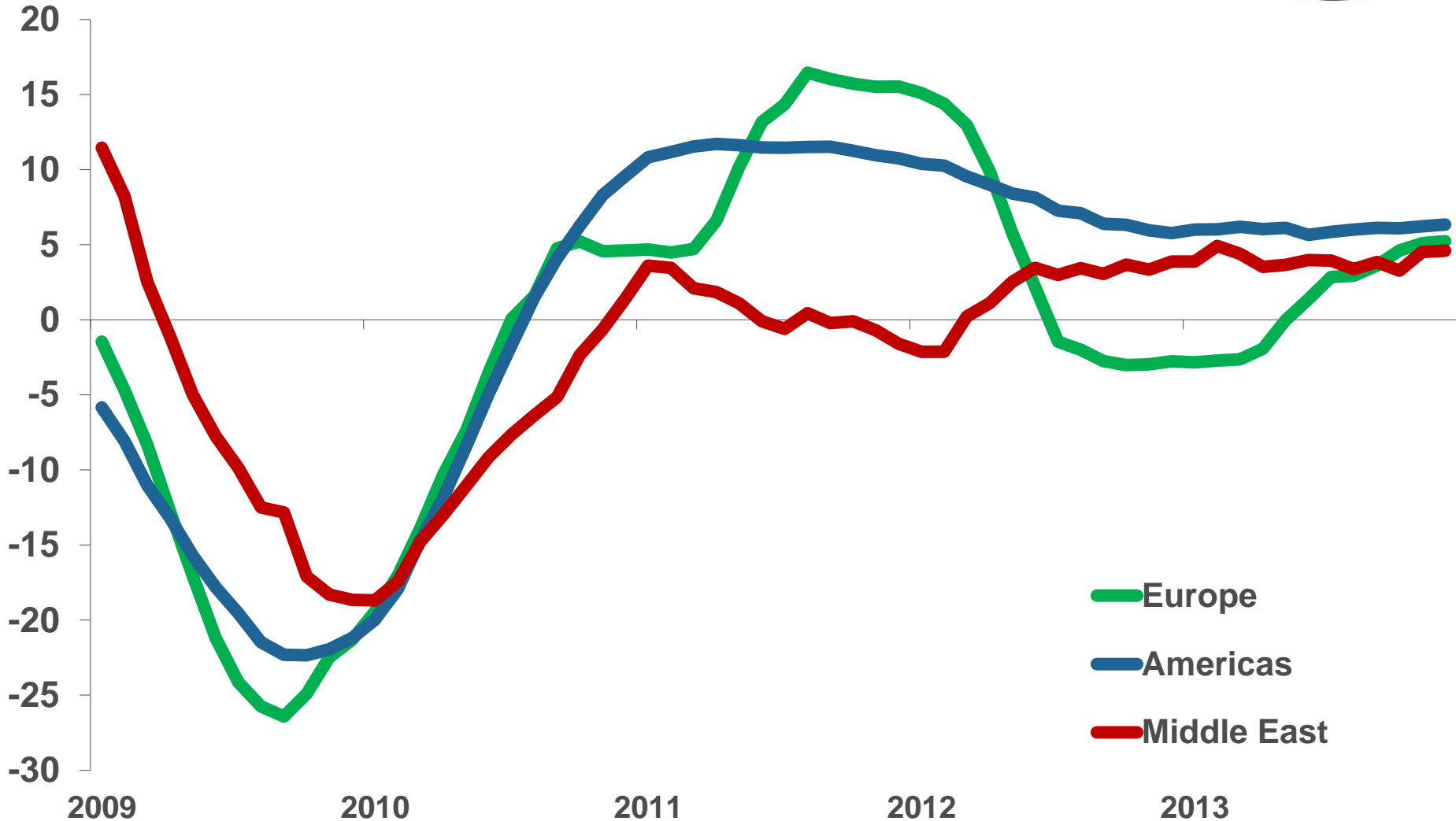
RevPAR Growth: Americas / MEA Recover

Luxury Class, RevPAR % Change by Region, 12 MMA , 2009 – 2013



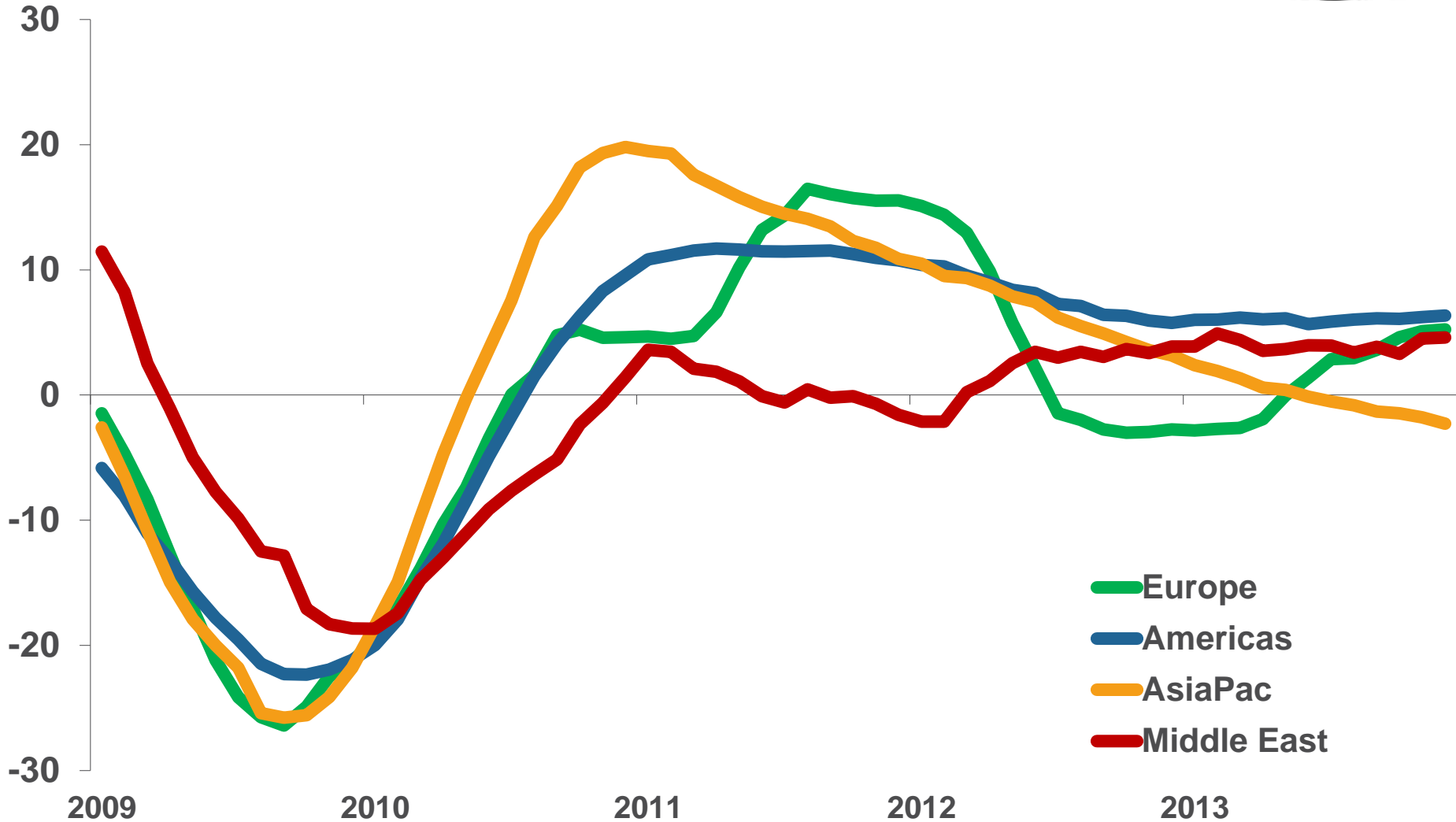
RevPAR Growth: Europe Finally On The Upswing

Luxury Class, RevPAR % Change by Region, 12 MMA , 2009 – 2013



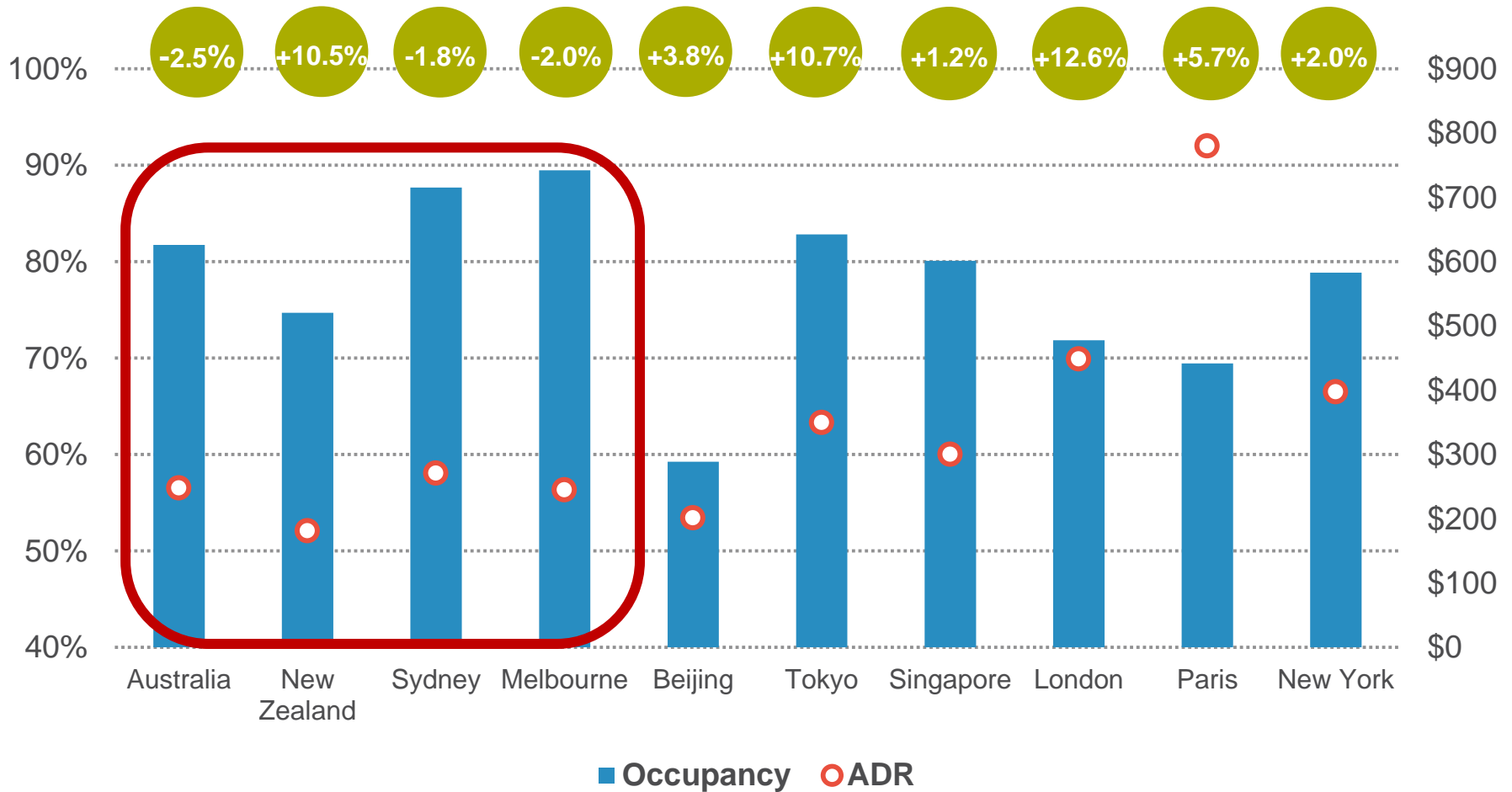
RevPAR Growth: Where is Asia Pacific Headed?

Luxury Class, RevPAR % Change by Region, 12 MMA , 2009–2013 (USD)



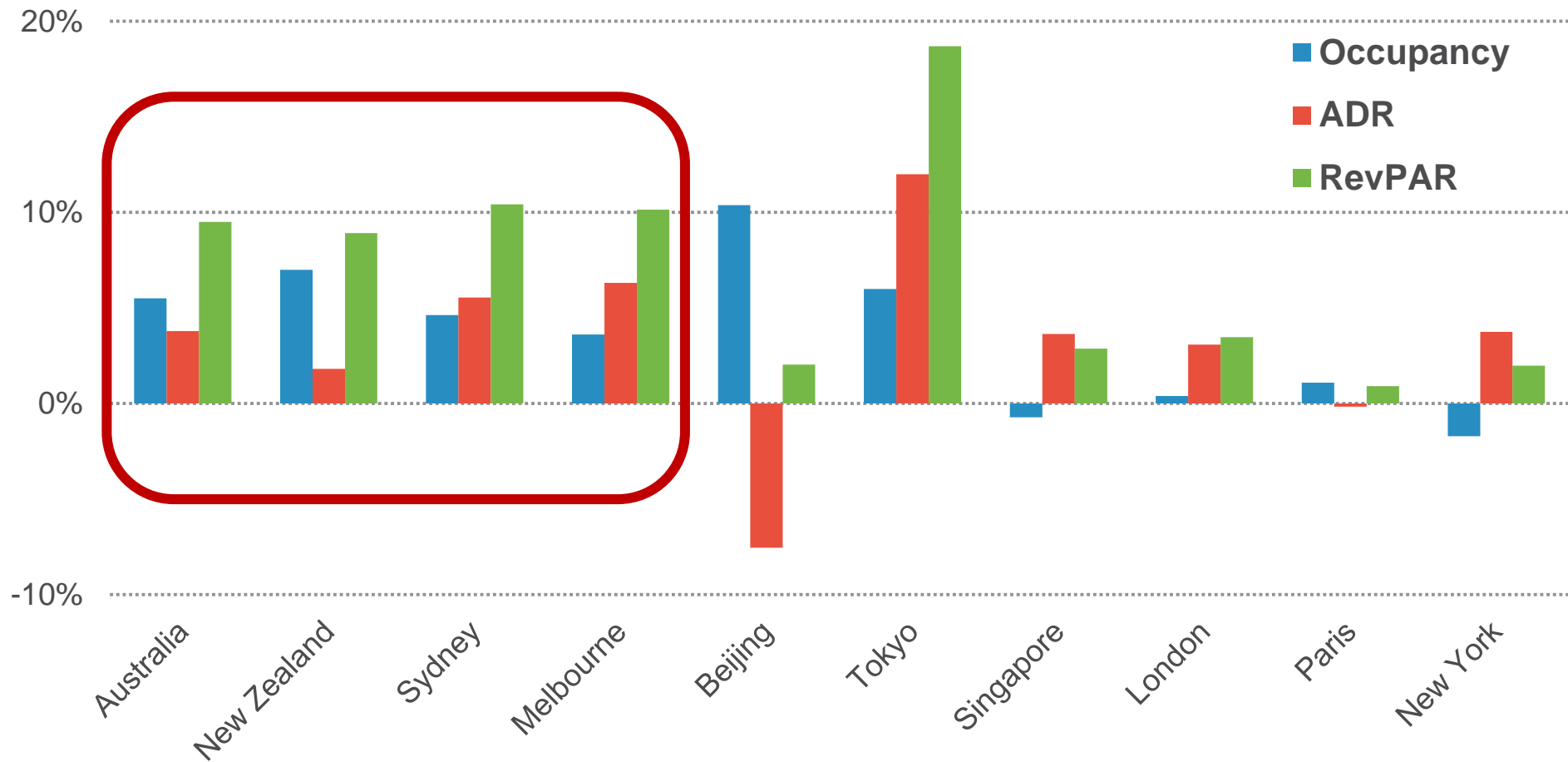
Selected markets – Luxury Class

Occ, ADR, RevPAR % Chg, May 2014 YTD, in USD



Selected markets – Occ, ADR, RevPAR

%Changes, May 2014 YTD, in Local Currency



3. Global Brand Performance



Some Brands Are Growing Quickly

Select Luxury Brands, Project Count:

Existing, Pipeline, Under Construction, May 2014



Brand	Existing Hotels	Total Pipeline Count	U/C
Sofitel	118	20	13
Fairmont	69	20	6
JW Marriott	66	41	29
Park Hyatt	33	16	8
Conrad	26	15	11

Some Brands Have A Large Footprint Already

Select Luxury Brands, Project Count:

Existing, Pipeline, Under Construction, May 2014



Brand	Existing Hotels	Total Pipeline Count	U/C
InterContinental	183	48	24
Four Seasons	92	25	15
Ritz-Carlton	87	29	13
St. Regis	30	15	9
Mandarin Oriental	27	11	5
Waldorf Astoria	27	9	3
The Peninsula Hotel	9	2	1

10 Other Noteworthy Luxury Brands

Select Luxury Brands, Project Count:

Existing, Pipeline, Under Construction, May 2014



Brand	Existing Hotels	Total Pipeline Count	U/C
Kempinski	73	28	10
Shangri-La	73	32	19
W Hotel	45	25	6
Taj Hotels	43	7	1
Grand Hyatt	41	19	11
Anantara	32	13	5
Aman Resorts	26		
Banyan Tree	21	21	5
Rosewood	19	9	4
Andaz	11	6	5

4. Pipeline

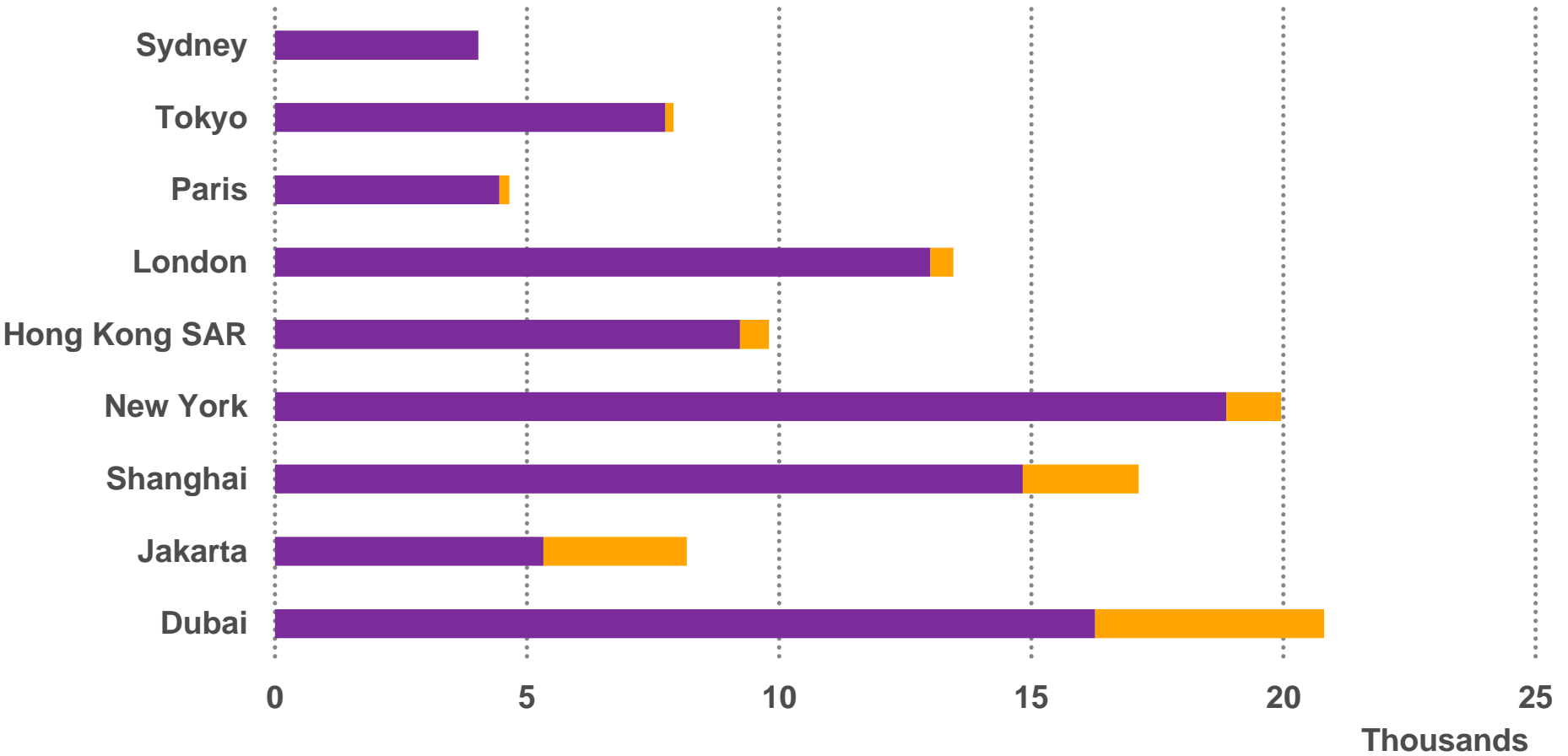


Selected Markets - Luxury Class Existing and Pipeline

Rooms, as of June 2014 (Pipeline Under Contract)



■ Existing ■ Pipeline

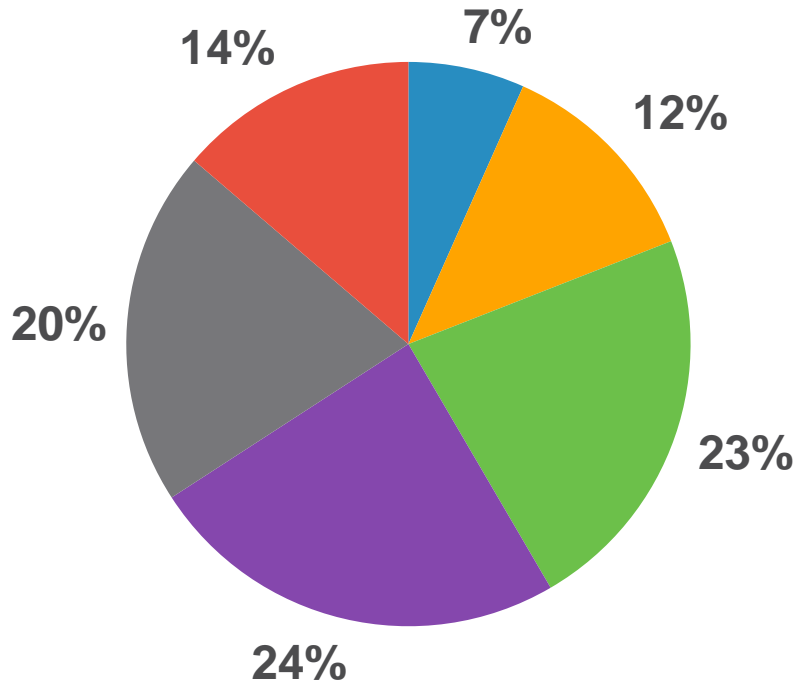


Australia Existing Supply & Pipeline

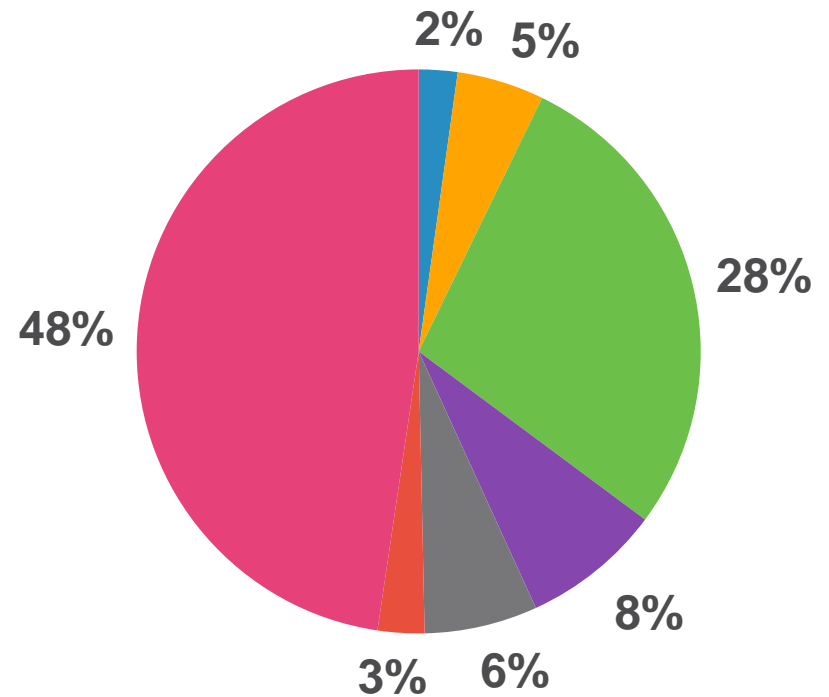
Pipeline (Under Contract), as of June 2014



Existing



Pipeline



■ Luxury Chains

■ Upper Midscale Chains

■ Unaffiliated

■ Upper Upscale Chains

■ Midscale Chains

■ Upscale Chains

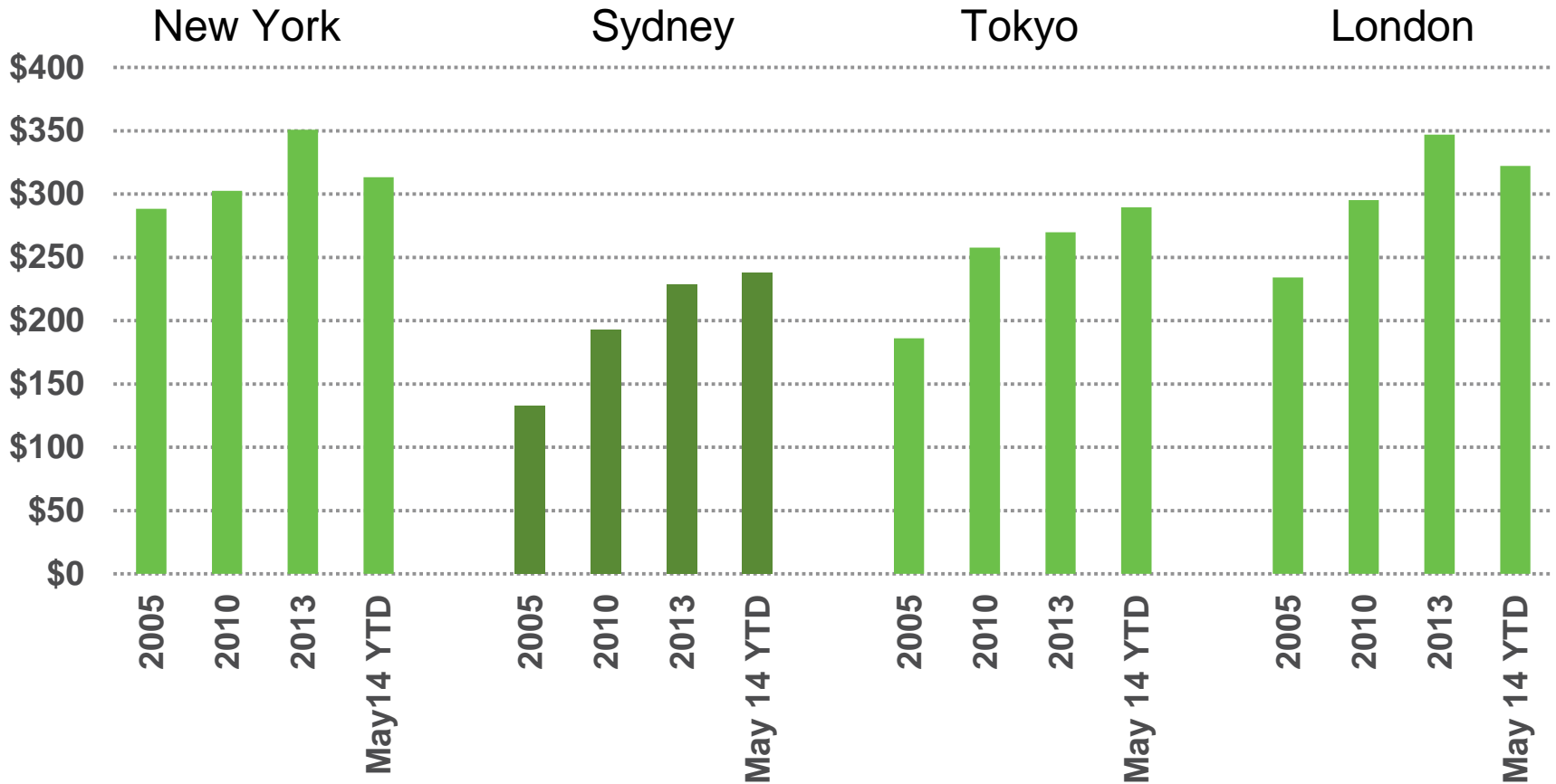
■ Economy Chains

5. Global Capitals



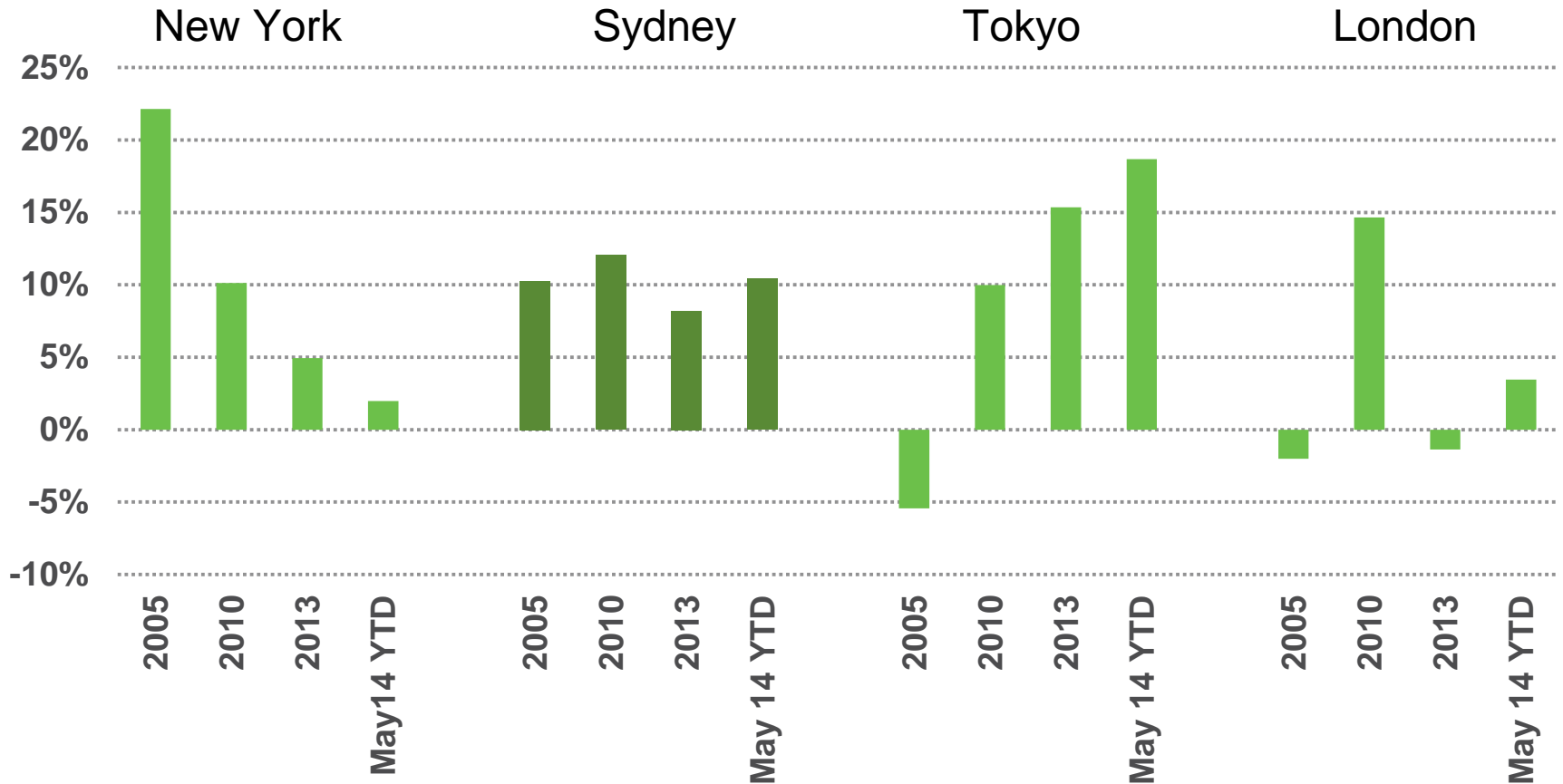
Selected markets – Luxury Class

RevPAR, May 2014 YTD, in USD



Selected markets – Luxury Class

RevPAR % Change, May 2014 YTD, in Local Currency



6. Sydney Focus

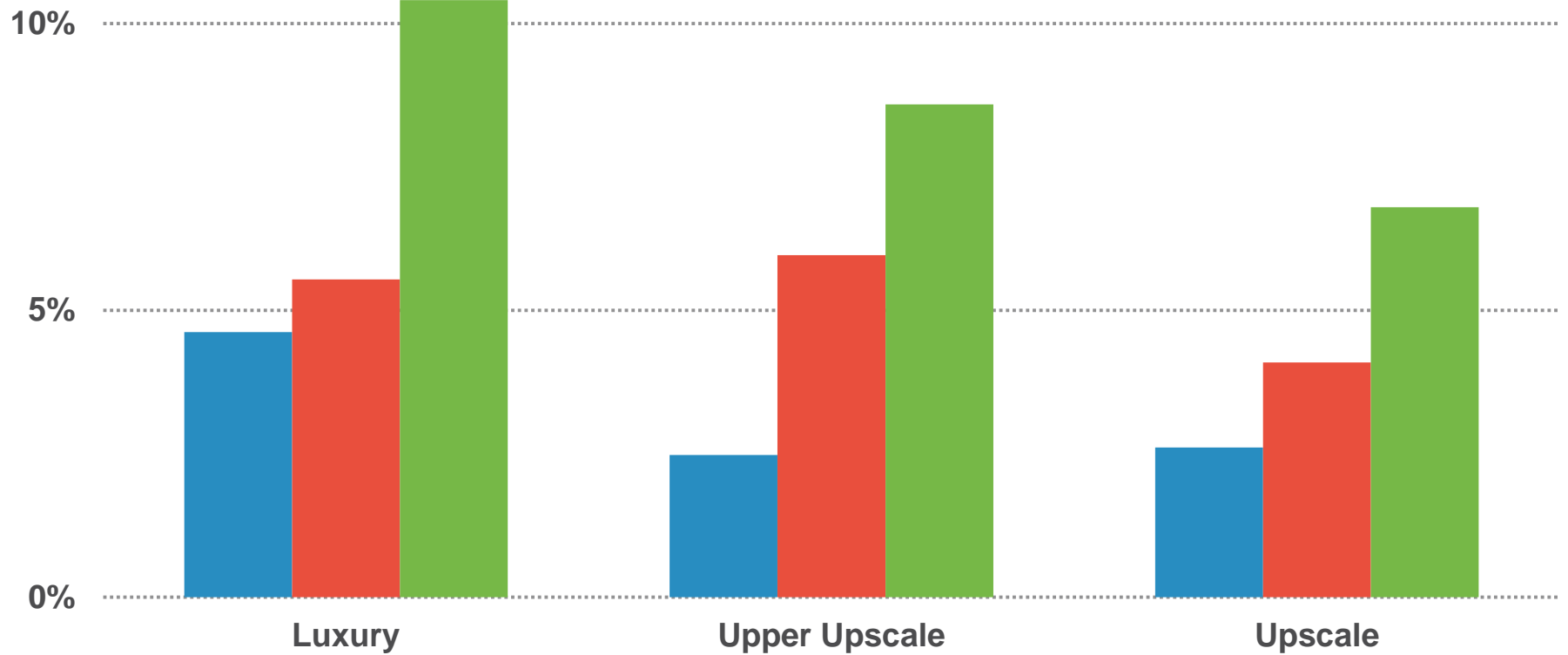


Sydney –Classes - Occ, ADR, RevPAR

%Changes, May 2014 YTD, in Local Currency

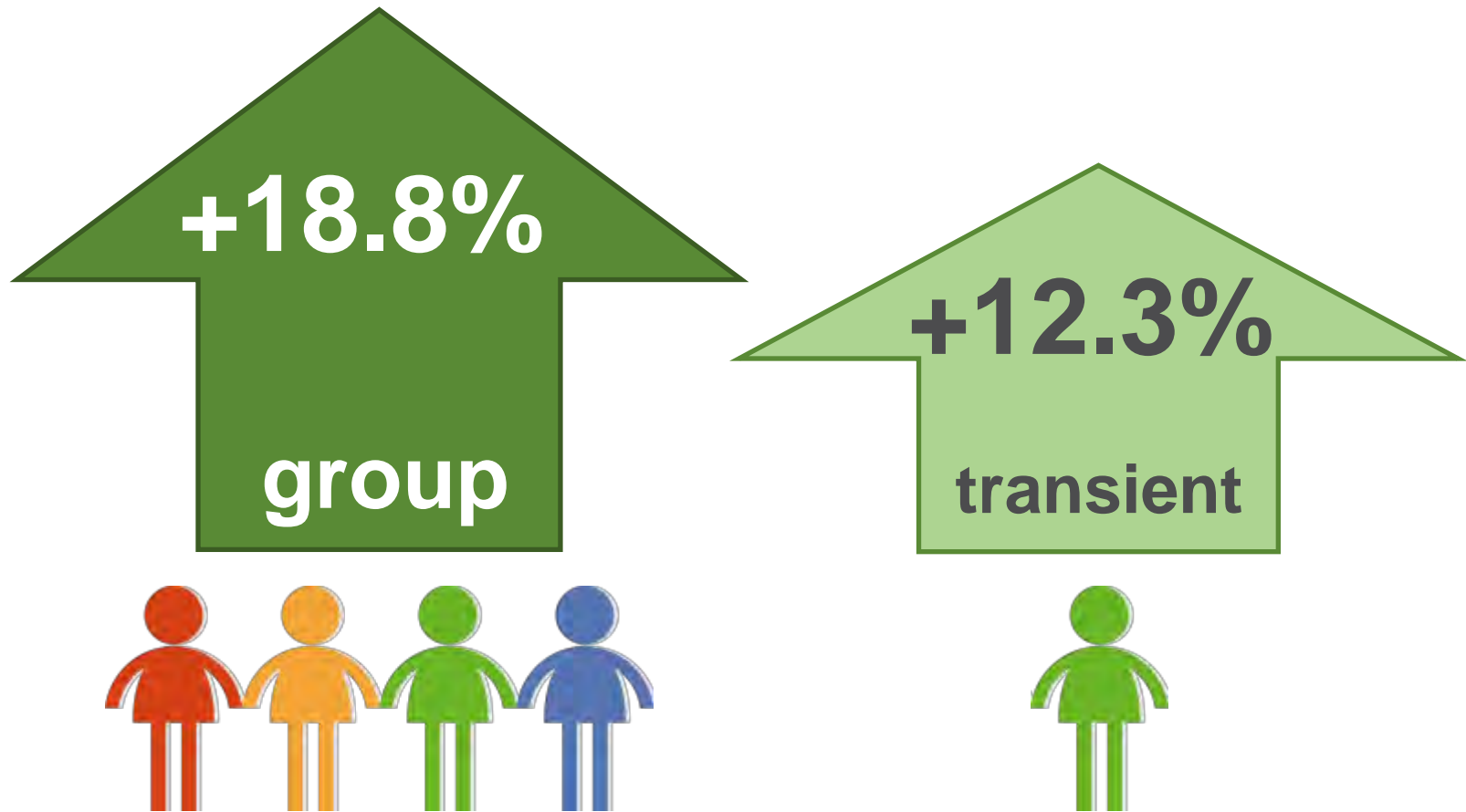


■ Occupancy ■ ADR ■ RevPAR



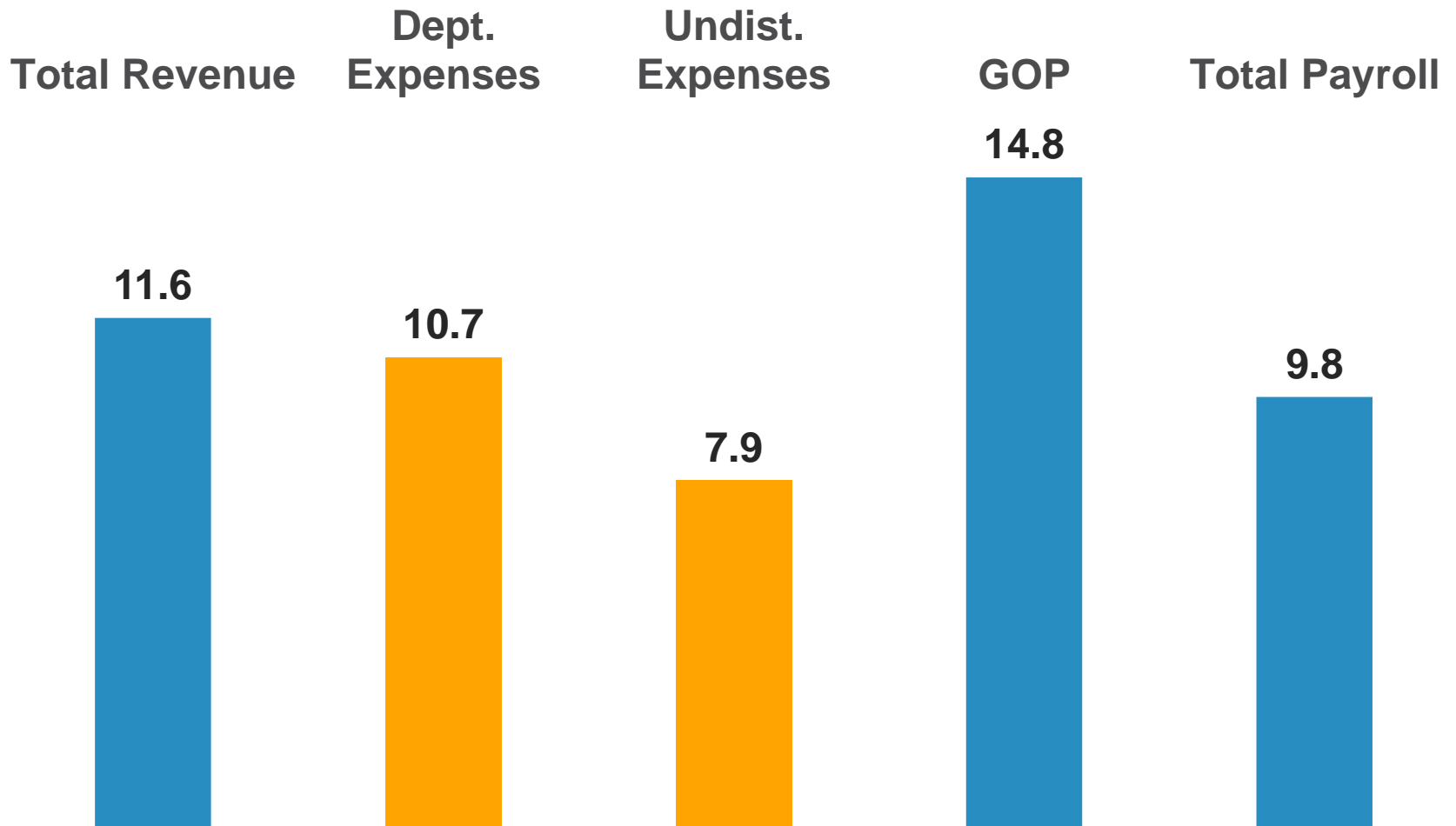
Sydney Segmentation - Group growth

Luxury & Upper Upscale, RevPAR % growth, May 2014 YTD, (AUD)



Sydney Luxury Class - P&L 2013

2012 % Change in AUD, per Available Room



Does Luxury Pay? Comparisons to understand the value.



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