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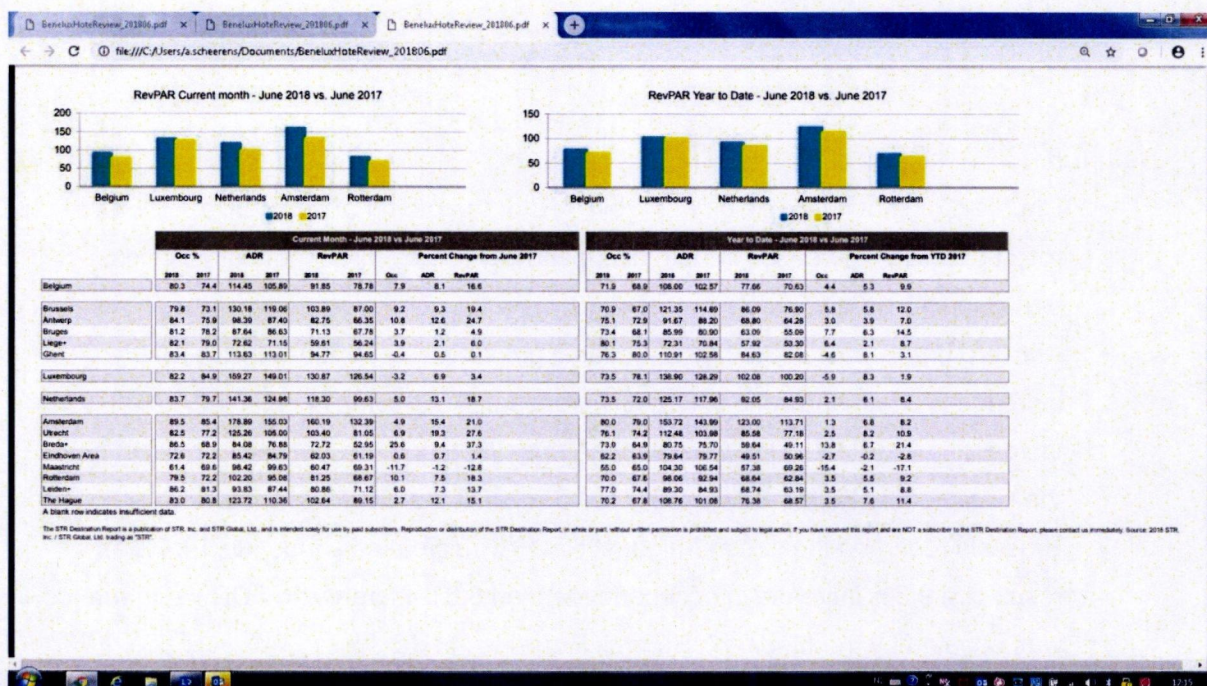
Geacht College en Raad

Naar aanleiding van het verzoek gisterenavond na de inspraak ronde treft u bijgesloten de cijfers aan van STR aan (click in de groen balk en zie cc van de uitdraai) waarnaar wij als Sahot verwijzen en die niet meegewogen zijn in het rapport van ZKA, deze cijfers laten gewoon een behoorlijk neergang zien.

Dit zijn geen cijfers van een maand (die kunnen inderdaad verschillen) maar cumulatieve cijfers over een half jaar gemeten t.o.v. een jaar daarvoor

Cijfer CBS en Toeristen belasting zijn gasten aantallen en STR zijn kamer bezetting cijfers van de hotels, beiden geven een indicatie weer wat er speelt en hoe een marktsituatie er uit ziet, het kan zijn dat de uitkomsten verschillend zijn, aangezien men over twee verschillende waardes praat, maar het verschil is te groot om zomaar aan voorbij te gaan en vraagt echt om een nadere analyse

Daarom pleiten wij als Sahot er ook voor om de komende twee jaar geen nieuwe vergunningen af te geven en deze op te rekken tot na 2021, dat wil niet zeggen dat er nu geen hotels meer bijkomen want men heeft al een aantal vergunningen vergeven en toezeggingen gedaan en die hotels of uitbreidingen kunnen gewoon doorgaan en zullen er ook in de loop van de komende twee jaar komen



Benelux Hotel Review
June 2018

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STR Market Update

Benelux Hotel Review

We are pleased to present June 2018 hotel performance results for Belgium, The Netherlands, and Luxembourg.

[Click here to download the June 2018 edition of STR's Benelux Market Update.](#)

More than 580 reporting hotels in Benelux and counting!

We are constantly growing our data sample in your market. Please contact us if you would like to receive an up-to-date participation list for your region!

Benelux RevPAR % change (local currency) June 2018 vs. June 2017

Belgium

- Double-digit growth for Belgium's RevPAR for the month of June, up 16.6% as a result of steady increases in both occupancy and ADR throughout most cities, particularly Brussels and Antwerp.
 - Antwerp hotels posted the highest overall growth levels in June, with a 10.8% increase in occupancy and a 12.6% increase in ADR combining for a 24.7% increase in RevPAR. June was also the opening month for Antwerp's newest hotel, the Hampton by Hilton Antwerp Central Station in the Diamond District.
 - Brussels recorded the second-highest RevPAR increase in June, up 19.4% as a result of a 9.3% increase in occupancy and an 8.8% increase in ADR. Performance was boosted by the MedTech Summit Brussels (11-15 June).
 - Bruges posted healthy RevPAR growth (+4.9%), with occupancy up 3.7% and ADR up 1.2%.
 - The Flemish city with the lowest RevPAR growth in June was Ghent, with a 0.4% decline in occupancy and a 0.5% increase in ADR combining for a flat 0.1% increase in ADR.
 - Liege hotels have again seen strong results, with RevPAR up 6.0% as a result of a 3.9% increase in occupancy and a 2.1% increase in ADR.
-

The Netherlands

- Very healthy RevPAR growth in the Netherlands for June 2018, up 18.7% as a result of a 5.0% increase in occupancy and a 13.1% increase in ADR.
- A high number of conferences in Amsterdam in June helped bring the market's occupancy up 4.9% and ADR up 15.4% for the month, resulting in a 21.0% increase in RevPAR.
- Breda posted the highest RevPAR growth in the Netherlands in June (+37.3%), followed up Utrecht (+27.6%). Breda's performance was mainly driven by occupancy growth (+25.6%), while Utrecht's performance was driven by ADR growth (+19.3%).
- Rotterdam, the Hague and Leiden all recorded double-digit RevPAR growth, while Eindhoven posted a more moderate 1.4% growth.
- Maastricht saw a 12.8% decline in RevPAR, brought down by an 11.7% decline in occupancy and a 1.2% decline in ADR.

Luxembourg

- Luxembourg is seeing a slight slowdown in occupancy levels. In June, occupancy dropped 3.2%, but a 6.9% increase in ADR counter balanced this decline to bring RevPAR up 3.4%.

Important Dates:

Next monthly STAR Report:

- 18 July 2018

Next Market Forecast:

- July 2018

Next European Pipeline Update:

- 18 July 2018

2018 Hotel Profitability Reports

Send STR your profitability data and in return, you'll receive two free reports!

Benefits of Submitting Data

In exchange for sharing your P&L data, you will receive the following:

- (Free) Industry Benchmarking Report - compares your hotel's performance to the local country/market
- (Free) Hotel Profitability Study – an in-depth overview of profitability trends in 16 key global markets
- (44% Discount) – Custom Profitability Reports

For more information on STR's Hotel Profitability Program, contact profitability@str.com

Global Hotel Study

As the hospitality industry's leading source for data and analytics, STR is thrilled to offer the second edition of our annual **Global Hotel Study**.

This study represents a great source of information for investors, developers, operators and anyone with a vested interest in the hotel industry, this is your roadmap for setting strategies for the year ahead and beyond.

Click here for a preview:

https://www.strglobal.com/Media/Default/images/GHS_2017_Preview.pdf

All monthly figures included in this report are submitted from hotels directly or via central offices.

We hope you find the numbers interesting and helpful. We remain at your service should you have any queries.

Business Development Manager Benelux, Scandinavia & Baltics

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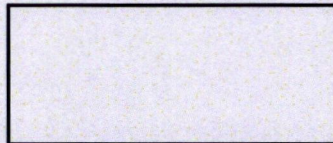
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Met vriendelijke groeten /with kind regards,

Hotel director

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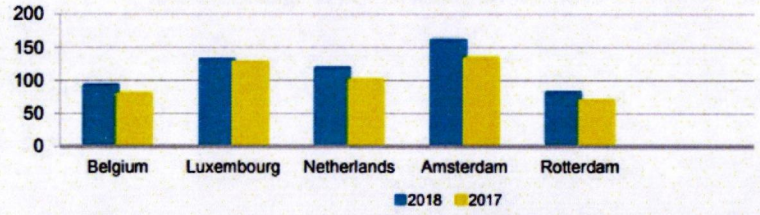
Hesperia
RESORTS

 2016
zoover
Award winnaar

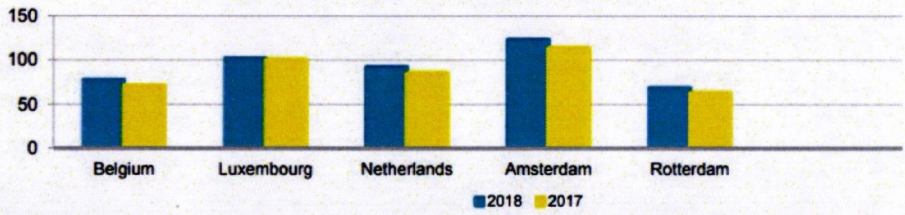
Voted **best hotel chain** 2014, 2015 and 2016 by the Dutch consumer.

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RevPAR Current month - June 2018 vs. June 2017



RevPAR Year to Date - June 2018 vs. June 2017



Current Month - June 2018 vs June 2017

	Occ %		ADR		RevPAR		Percent Change from June 2017		
	2018	2017	2018	2017	2018	2017	Occ	ADR	RevPAR
	Belgium	80.3	74.4	114.45	105.89	91.85	78.78	7.9	8.1
Brussels	79.8	73.1	130.18	119.06	103.89	87.00	9.2	9.3	19.4
Antwerp	84.1	75.9	98.39	87.40	82.75	66.35	10.8	12.6	24.7
Bruges	81.2	78.2	87.64	86.63	71.13	67.78	3.7	1.2	4.9
Liege+	82.1	79.0	72.62	71.15	59.61	56.24	3.9	2.1	6.0
Ghent	83.4	83.7	113.63	113.01	94.77	94.65	-0.4	0.5	0.1
Luxembourg	82.2	84.9	159.27	149.01	130.87	126.54	-3.2	6.9	3.4
Netherlands	83.7	79.7	141.36	124.98	118.30	99.63	5.0	13.1	18.7
Amsterdam	89.5	85.4	178.89	155.03	160.19	132.39	4.9	15.4	21.0
Utrecht	82.5	77.2	125.26	105.00	103.40	81.05	6.9	19.3	27.6
Breda+	86.5	68.9	84.08	76.88	72.72	52.95	25.6	9.4	37.3
Eindhoven Area	72.6	72.2	85.42	84.79	62.03	61.19	0.6	0.7	1.4
Maastricht	61.4	69.6	98.42	99.63	60.47	69.31	-11.7	-1.2	-12.8
Rotterdam	79.5	72.2	102.20	95.08	81.25	68.67	10.1	7.5	18.3
Leiden+	86.2	81.3	93.83	87.44	80.86	71.12	6.0	7.3	13.7
The Hague	83.0	80.8	123.72	110.36	102.64	89.15	2.7	12.1	15.1

Year to Date - June 2018 vs June 2017

	Occ %		ADR		RevPAR		Percent Change from YTD 2017		
	2018	2017	2018	2017	2018	2017	Occ	ADR	RevPAR
	Belgium	71.9	68.9	108.00	102.57	77.66	70.63	4.4	5.3
Brussels	70.9	67.0	121.35	114.69	86.09	76.90	5.8	5.8	12.0
Antwerp	75.1	72.9	91.67	88.20	68.80	64.28	3.0	3.9	7.0
Bruges	73.4	68.1	85.99	80.90	63.09	55.09	7.7	6.3	14.5
Liege+	80.1	75.3	72.31	70.84	57.92	53.30	6.4	2.1	8.7
Ghent	76.3	80.0	110.91	102.58	84.63	82.08	-4.6	6.1	3.1
Luxembourg	73.5	78.1	138.90	128.29	102.08	100.20	-5.9	8.3	1.9
Netherlands	73.5	72.0	125.17	117.96	92.05	84.93	2.1	6.1	8.4
Amsterdam	80.0	79.0	153.72	143.99	123.00	113.71	1.3	6.8	8.2
Utrecht	76.1	74.2	112.48	103.98	85.58	77.18	2.5	8.2	10.9
Breda+	73.9	64.9	80.75	75.70	59.64	49.11	13.8	6.7	21.4
Eindhoven Area	62.2	63.9	79.64	79.77	49.51	50.96	-2.7	-0.2	-2.8
Maastricht	55.0	65.0	104.30	106.54	57.38	69.26	-15.4	-2.1	-17.1
Rotterdam	70.0	67.6	98.06	92.94	68.64	62.84	3.5	5.5	9.2
Leiden+	77.0	74.4	89.30	84.93	68.74	63.19	3.5	5.1	8.8
The Hague	70.2	67.8	108.76	101.08	76.38	68.57	3.5	7.6	11.4

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