



Passion
for COLLABORATION
REMINGTON

DAY 2

IBT TRAINING AGENDA

Day 2 - Wednesday, July 17, 2019			Location
7:00 – 8:00am	Breakfast		Salon E
8:05 – 8:25am	Overview of Day & State of Industry	LaDonna Gerhart	Salons A, B, C
8:25 – 9:30am	TripBAM	David Mallov	Salons A, B, C
9:30 – 10:30am	Zoom Info	Bill Wilson	Salons A, B, C
10:30 – 10:45am	AM Break		Salons A, B, C
10:45 – 11:45am	TravelClick A360	Jessica Purslow/Joan King/Chad G.	Salons A, B, C
11:45 – 12:45pm	Lunch		Salon E
12:45 – 2:45pm	TravelClick A360	Jessica Purslow/Joan King/Chad G.	Salons A, B, C
2:45 – 3:45pm	Local Account Selling- B Out	Loretta Macke/Tara Jordan/Kris Frazee	Salons A, B, C
2:45 – 3:45pm	National Account Sales- B Out	Chad Goodnough/RD of BT	Salons A, B, C
3:45 – 4:00pm	PM Break		Salons A, B, C
4:00 – 5:30pm	Joining Forces	Monica Lopez/RD of BT/Chad G.	Salons A, B, C
6:00 – 8:00pm	Dinner- Off Site		Uncle Julio's Grapevine



Remington Partners Supporting our IBT Pinnacle Training



JASON ANDERSON

Sr. Director, Franchise Support
Service Delivery + Performance

SUELLEN M. BOLLES

Senior Director, Global Accounts



zoominfo

BILL WILSON

Customer Success Manager



CARL COHEN, VP

Management & Ownership Groups

JESSICA M. PURSLOW, Sr. Director

Management & Owner Groups

JOAN KING

Key Account Manager



DFW AIRPORT MARRIOTT



STEVE REYNOLDS

Founder & CEO

DAVID MOLLOV

Managing Director
Hotel Solutions



Hilton

HOTELS & RESORTS

LAURA CHRISTIAN

Director of Worldwide BTS
Extended Stay & Project Travel

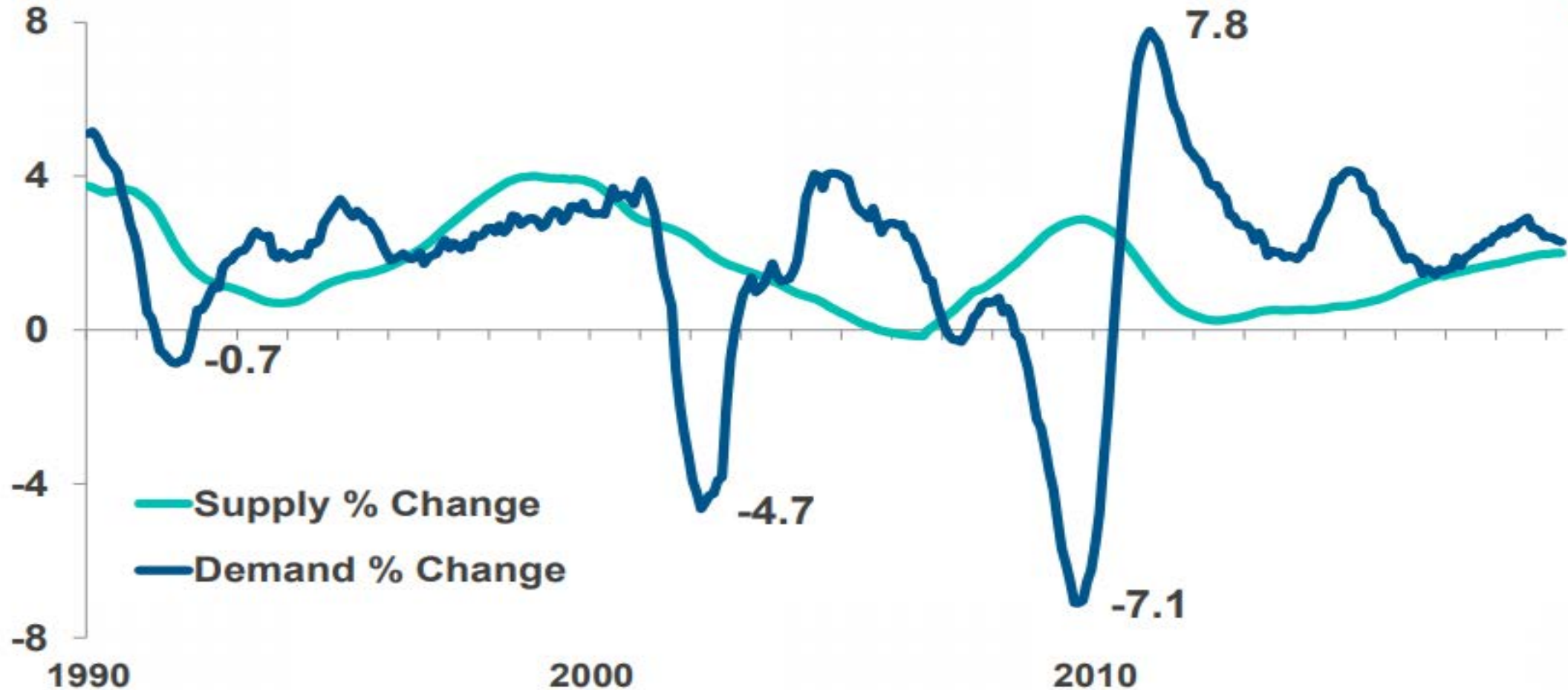


State of the Industry

LaDonna Gerhart

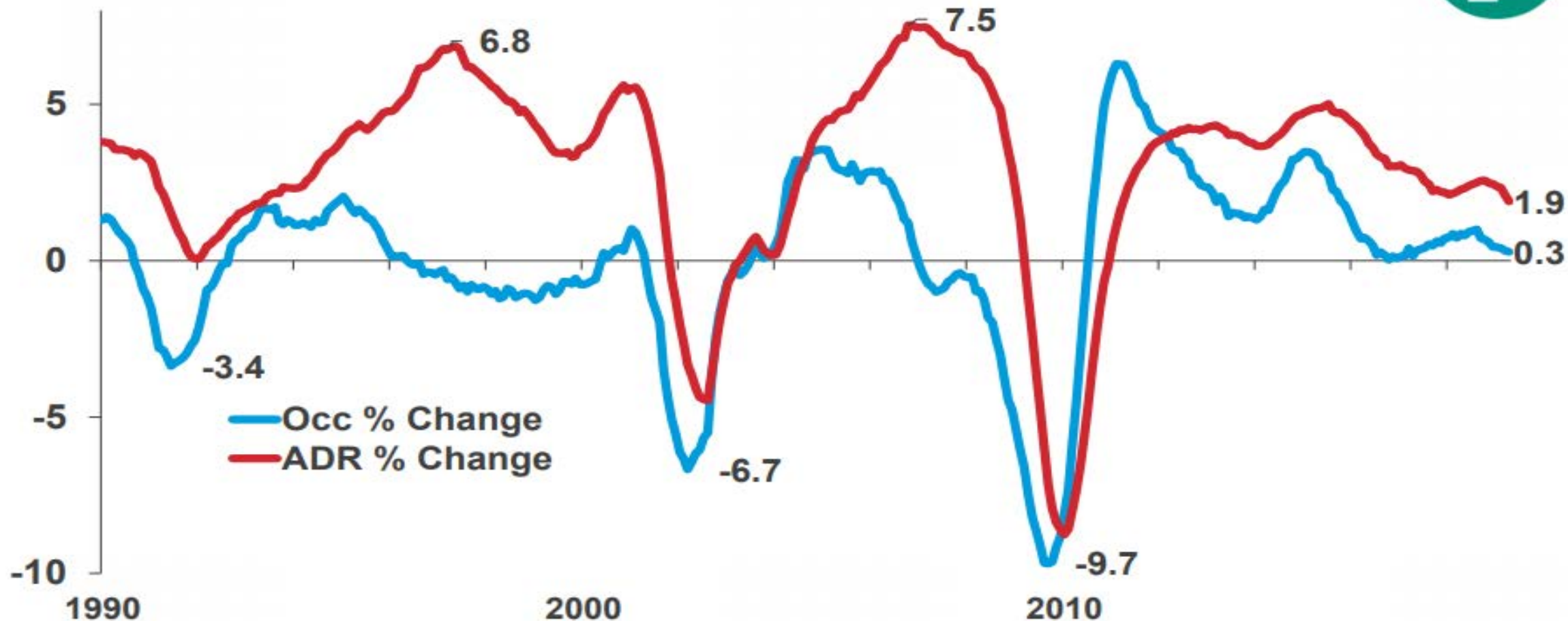
Industry Performance – Demand vs. Supply

Demand Growth Trajectory Slows. Supply Growth Still At 2%



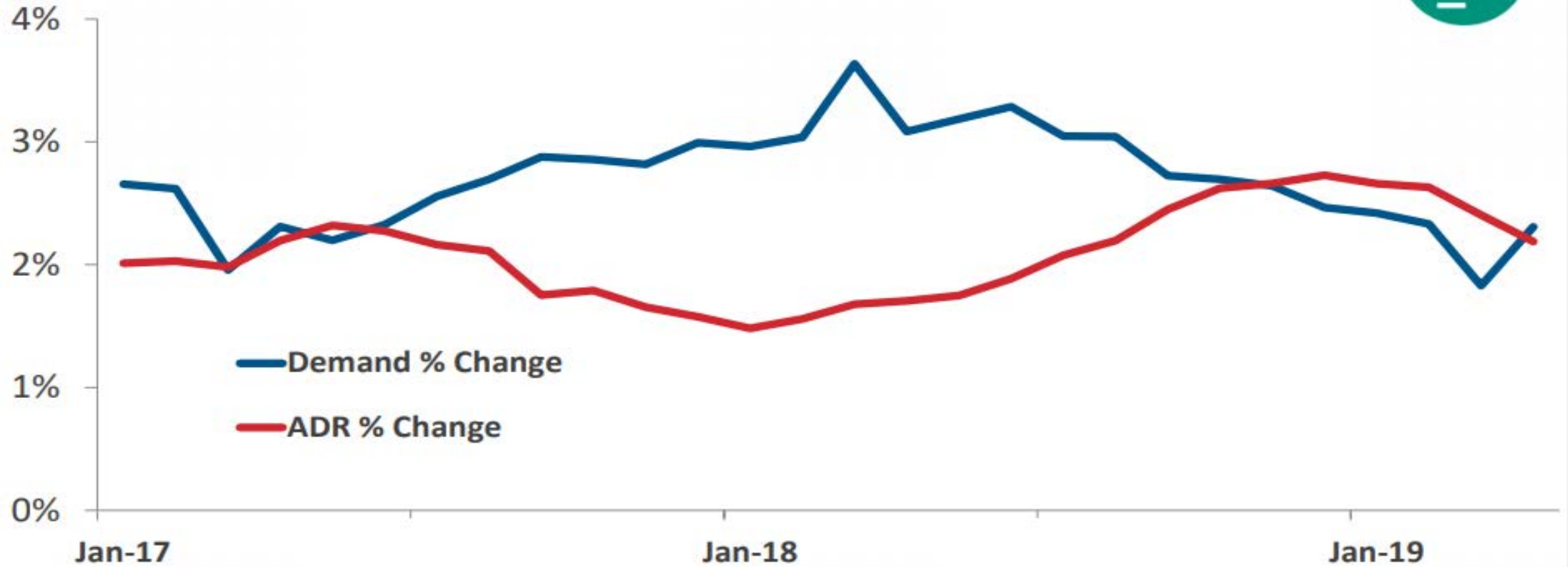
Industry Performance - Occupancy vs. ADR

Long Run ADR Growth Now Below 2% For The First Time Since 2011



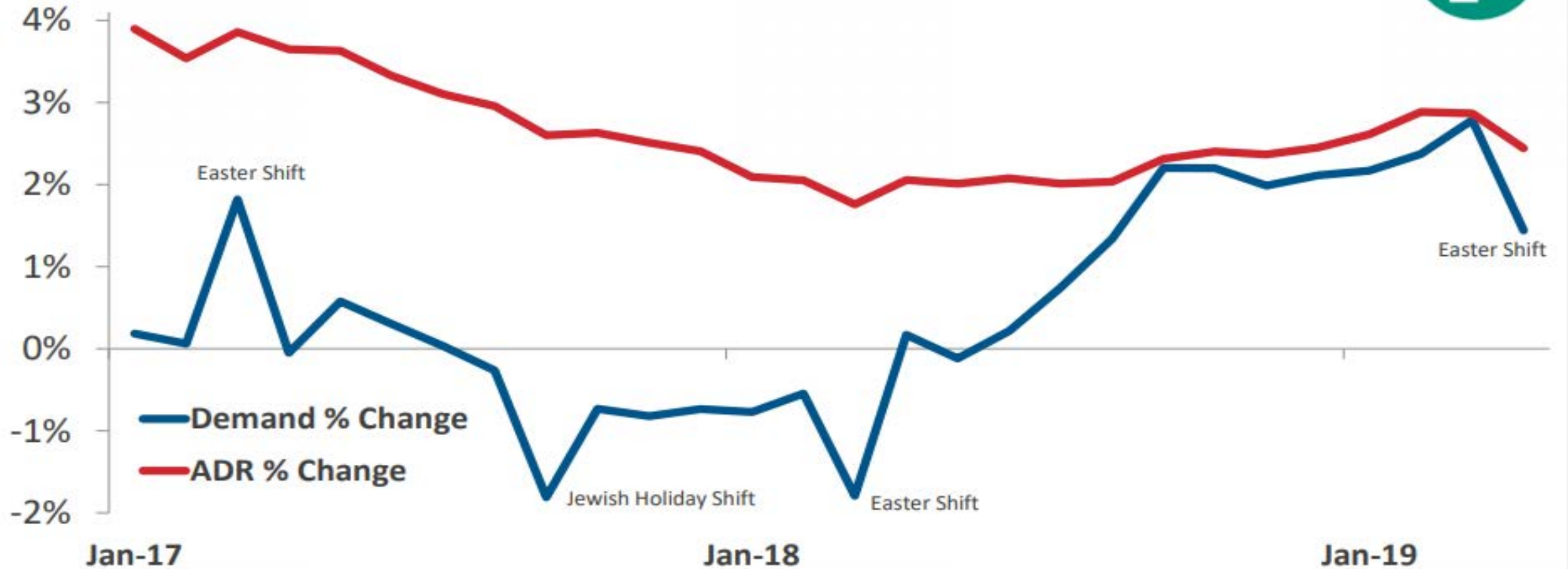
Industry Performance – Transient

Transient Performance: ADR Growth Acceleration Has Stalled Out



Industry Performance – Group

Group Performance: The Usual Easter Hiccup in Demand Growth



Pipeline Overview - Summary

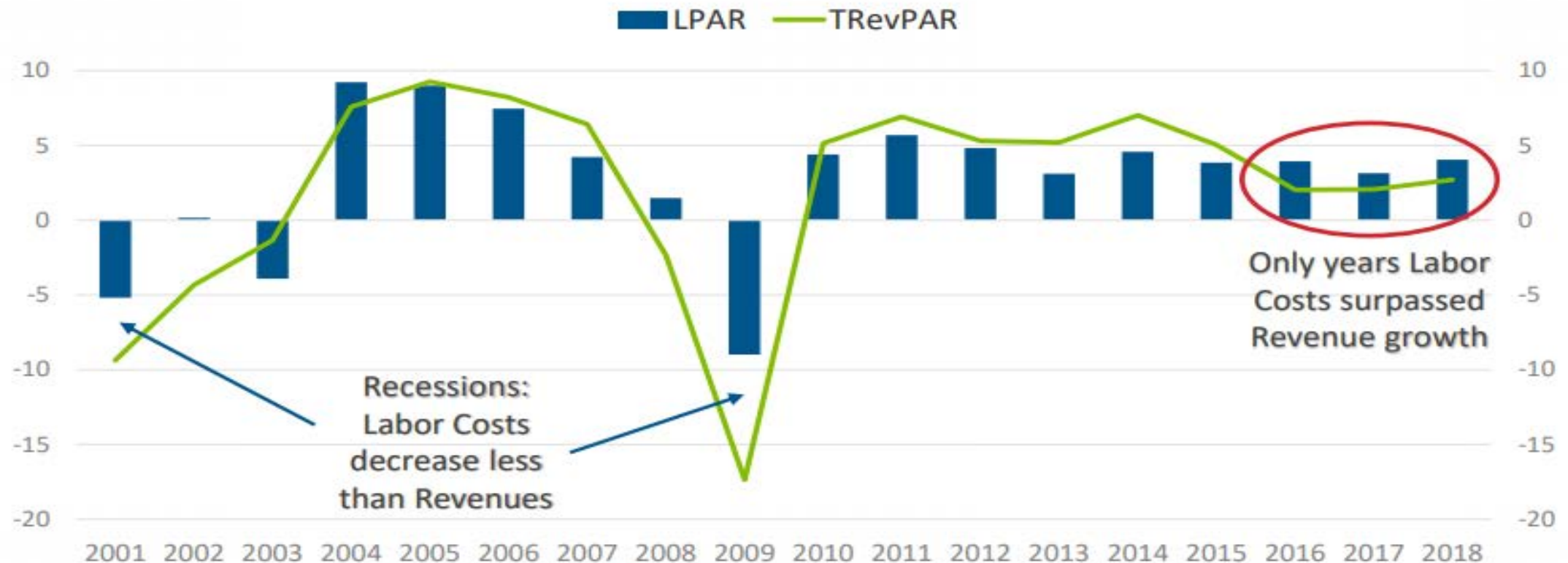
US Pipeline: I/C Rooms Increase, But Still Manageable

<u>Phase</u>	<u>2019</u>	<u>2018</u>	<u>% Change</u>
In Construction	203	187	8.9%
Final Planning	223	221	0.5%
Planning	230	186	23.9%
Under Contract	656	594	10.4%

P&L Overview – Labor Costs

Past 3 years Labor costs have outpaced Revenue growth

Labor and Revenues – Year-over-year percentage growth



Only years Labor Costs surpassed Revenue growth

Recessions:
Labor Costs decrease less than Revenues

Industry Outlook – KPI Forecasts

Outlook		
Metric	2019 Forecast	2020 Forecast
Supply	1.9%	1.9%
Demand	2.0%	1.7%
Occupancy	0.1%	-0.2%
ADR	1.9%	2.2%
RevPAR	2.0%	1.9%

Top 10 Preferred Accounts (June 2019 YTD)

By Room Nights:

Account	Room Nights
ACCENTURE	6,964
DELOITTE	6,678
IBM PREFERRED	6,531
IBM	4,755
AMAZON.COM	4,180
Cargill	5,674
GENERAL DYNAMICS CORP	4,972
HONEYWELL	5,365
LOCKHEED MARTIN	3,724
LAM RESEARCH	2,526

By Revenue:

Account	Revenue
ACCENTURE	\$1,324,866
DELOITTE	\$1,269,986
IBM PREFERRED	\$1,198,380
IBM	\$794,777
AMAZON.COM	\$704,130
Cargill	\$697,513
GENERAL DYNAMICS CORP	\$674,870
HONEYWELL	\$579,452
LOCKHEED MARTIN	\$568,744
LAM RESEARCH	\$534,099

Top / Bottom 10 Movers in Preferred Room Nights YoY (June 2019YTD)

Top 10:

Property	2019 RN	# Variance	% Variance
PMH	8,212	4,378	114.2 %
INC	12,838	3,589	38.8 %
VBH	12,782	2,931	29.8 %
JRI	4,177	2,653	174.1 %
MNH	10,044	1,816	22.1 %
NRI	7,762	1,714	28.3 %
ANC	8,132	1,683	26.1 %
BBH	8,853	1,629	22.5 %
NCY	9,148	1,223	15.4 %
PWE	11,999	1,168	10.8 %

Bottom 10:

Property	2019 RN	# Variance	% Variance
LIH	8,785	-5,684	-39.3 %
PHS	1,659	-1,689	-50.4 %
COH	2,910	-1,514	-34.2 %
AES	2,404	-1,388	-36.6 %
DES	3,655	-1,164	-24.2 %
SCY	2,773	-1,136	-29.1 %
PHI	5,464	-884	-13.9 %
FWW	6,360	-880	-12.2 %
SLM	8,880	-866	-8.9 %
LBV	3,694	-841	-18.5 %

Top / Bottom 10 Movers in Preferred Revenue YoY (June 2019YTD)

Top 10:

Property	2019 REV	# Variance	% Variance
BBH	\$2,242,819	\$537,274	31.5 %
INC	\$1,674,101	\$428,181	34.4 %
VBH	\$1,555,870	\$394,931	34.0 %
JRI	\$564,076	\$387,110	218.7 %
NRI	\$1,601,390	\$377,944	30.9 %
PMH	\$657,177	\$330,375	101.1 %
NCY	\$1,876,389	\$267,530	16.6 %
ANC	\$1,100,402	\$247,834	29.1 %
MNH	\$1,305,377	\$209,657	19.1 %
STP	\$1,323,720	\$190,944	16.9 %

Bottom 10:

Property	2019 REV	# Variance	% Variance
LIH	\$1,174,618	(\$796,805)	-40.4 %
AES	\$401,445	(\$213,650)	-34.7 %
COH	\$387,939	(\$206,557)	-34.7 %
PHS	\$221,161	(\$187,708)	-45.9 %
DES	\$479,391	(\$178,796)	-27.2 %
SCY	\$348,334	(\$161,561)	-31.7 %
SLM	\$1,335,316	(\$158,750)	-10.6 %
LBV	\$489,354	(\$130,308)	-21.0 %
WCR	\$849,397	(\$120,236)	-12.4 %
FWW	\$1,177,285	(\$99,776)	-7.8 %

Common Accounts (June 2019YTD)

Account	# of Properties with Account
GENERAL ELECTRIC GPP	34
GENERAL DYNAMICS	33
CISCO GPP	32
GENERAL MOTORS GPP	32
IBM GPP	32
PRICEWATERHOUSECOOPERS	32
ACCENTURE GPP	31
GENERAL DYNAMICS CORP	31
HEWLETT PACKARD GPP	31
MICROSOFT GPP	31

Account	# of Properties with Account
AT&T WARNERMEDIA GPP	30
KPMG GPP	30
MEDTRONIC GPP	30
BERKSHIRE HATHAWAY GPP	29
GPP SAP AG	29
CVS HEALTH GPP	28
DANAHER GPP	28
MARCH OF DIMES	28
JOHNSON & JOHNSON GPP	27
ORACLE CORP GLOBAL PRT	27