

Destination Insights :
Looking at channels
and segments

The Brave new world of
Hotel Distribution



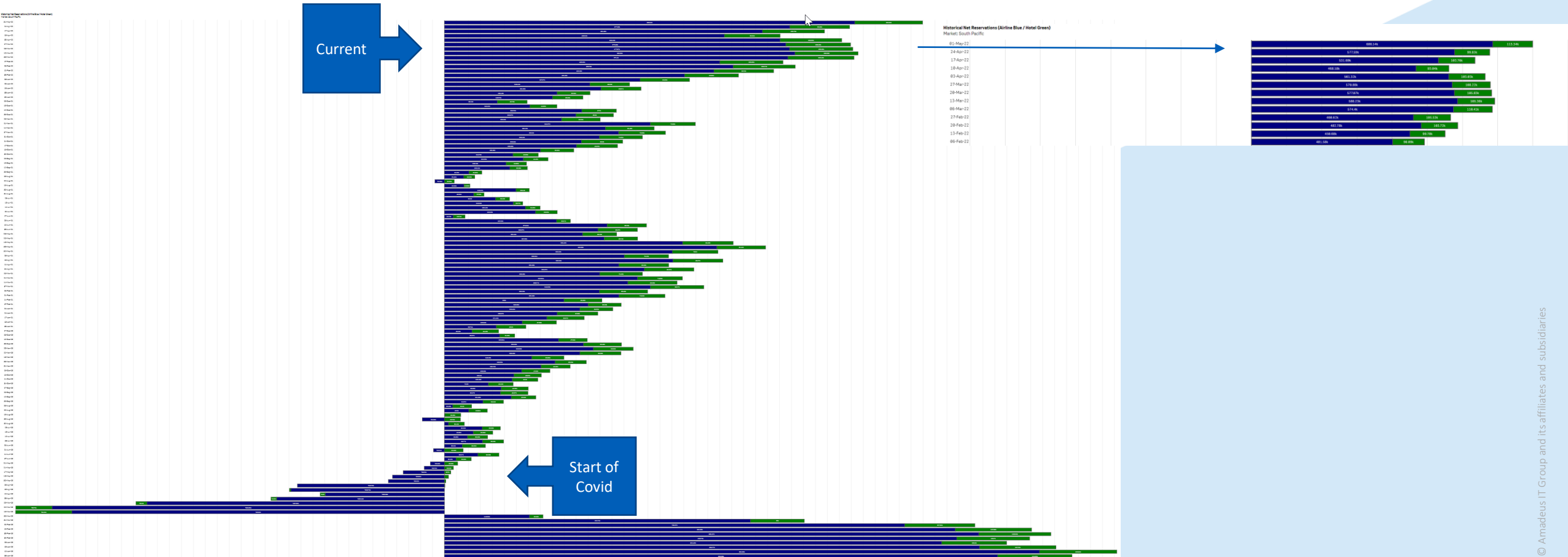
amadeus



Historical Net Reservations (Airline Blue / Hotel Green) - Pacific

Extract Date: May/05/2022 (as of date is 3 days prior)

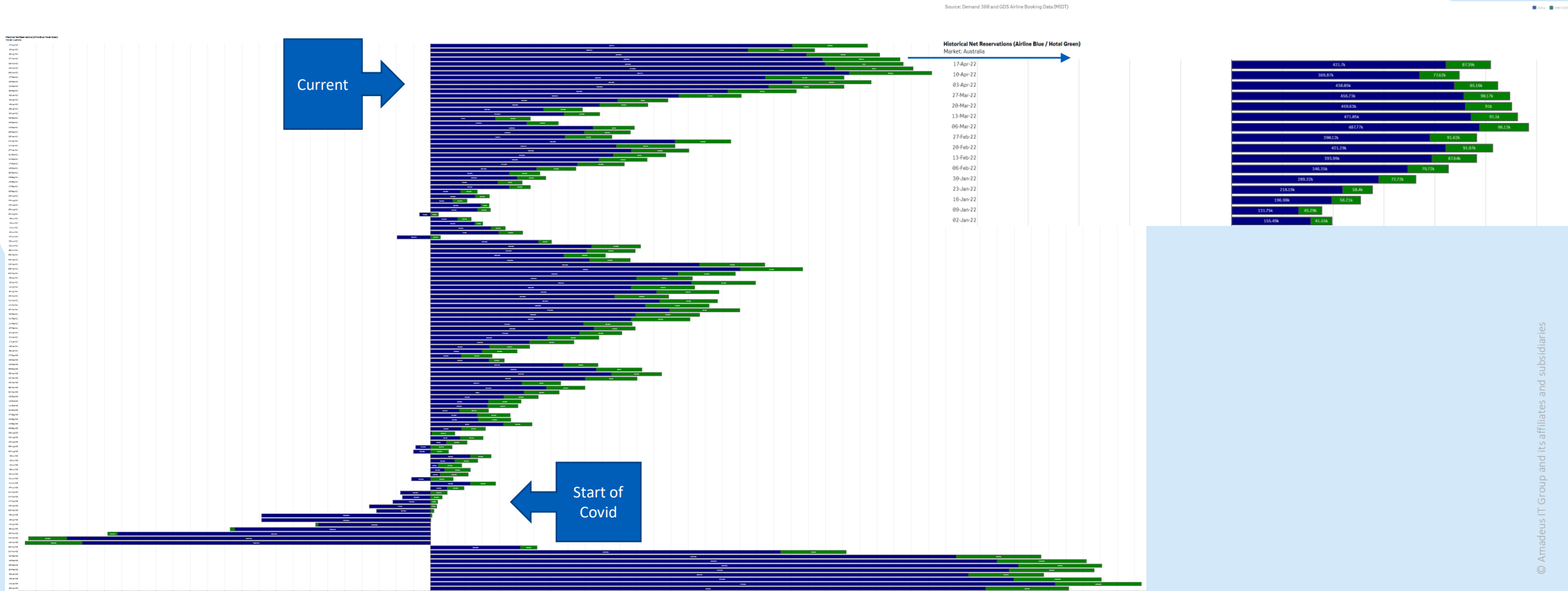
_Week 01 MAY: 686.14K Air / 113.3K Hotels (Air Approx. 2/3 back in comparison to Pre COVID)



Historical Net Reservations (Airline Blue / Hotel Green) - Australia

Extract Date: Apr/24/2022 (as of date is 3 days prior)

_Week 17 APR: 421.7K Air / 87.39K Hotels (Air Approx. 2/3 back in comparison to Pre COVID)

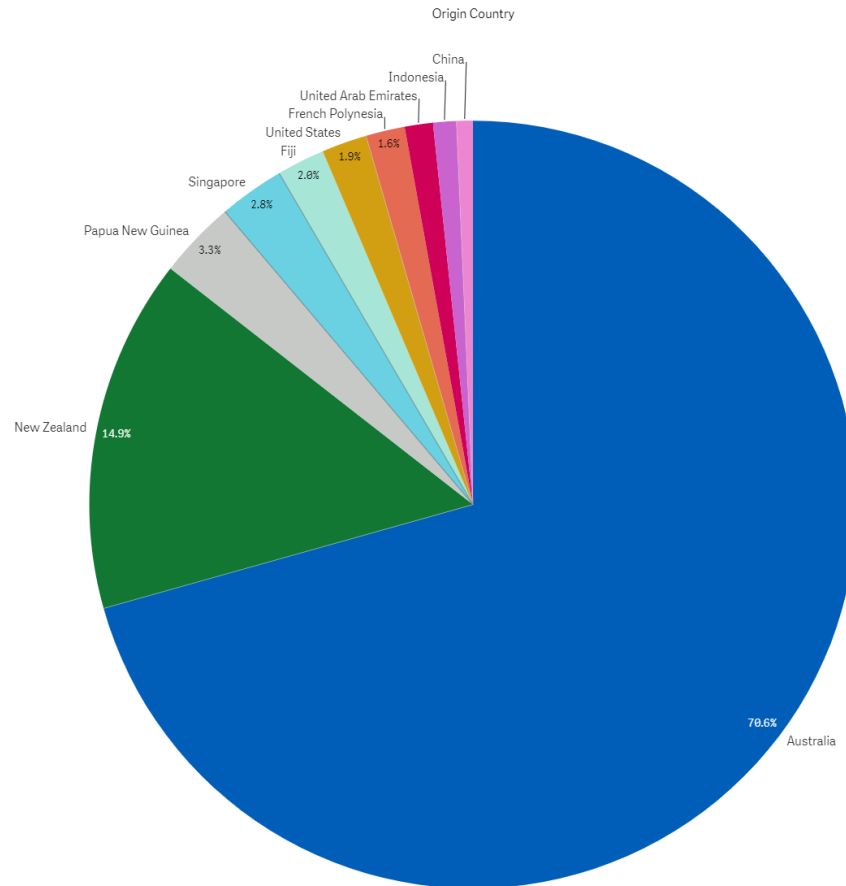


Source of Flights - Pacific

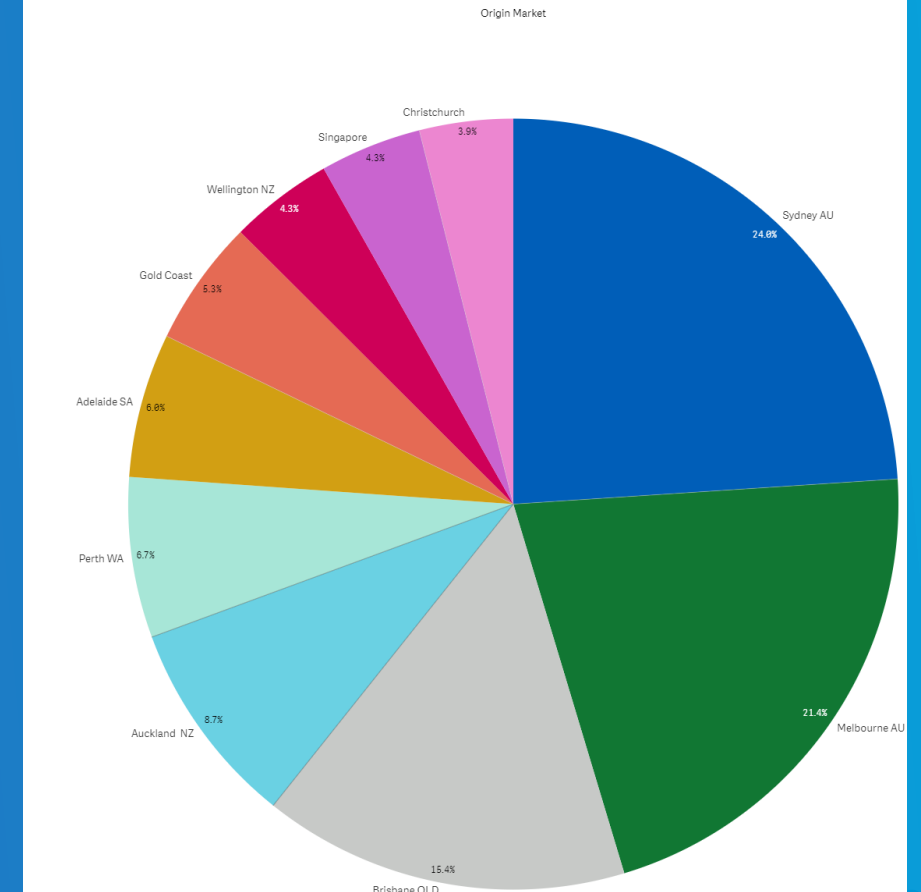
Extract Date: May/05/2022 (as of date is 3 days prior)

- _ Flights into Pacific for May, June, July 2022
- _ 70.6% Flights Originating from Australia with Sydney, Melbourne, Brisbane and Auckland leading the Travel Bookings

Top 10 Origin Country, Current Total Seats for Destination Market Selected



Top 10 Origin Market, Current Total Seats for Destination Market Selected

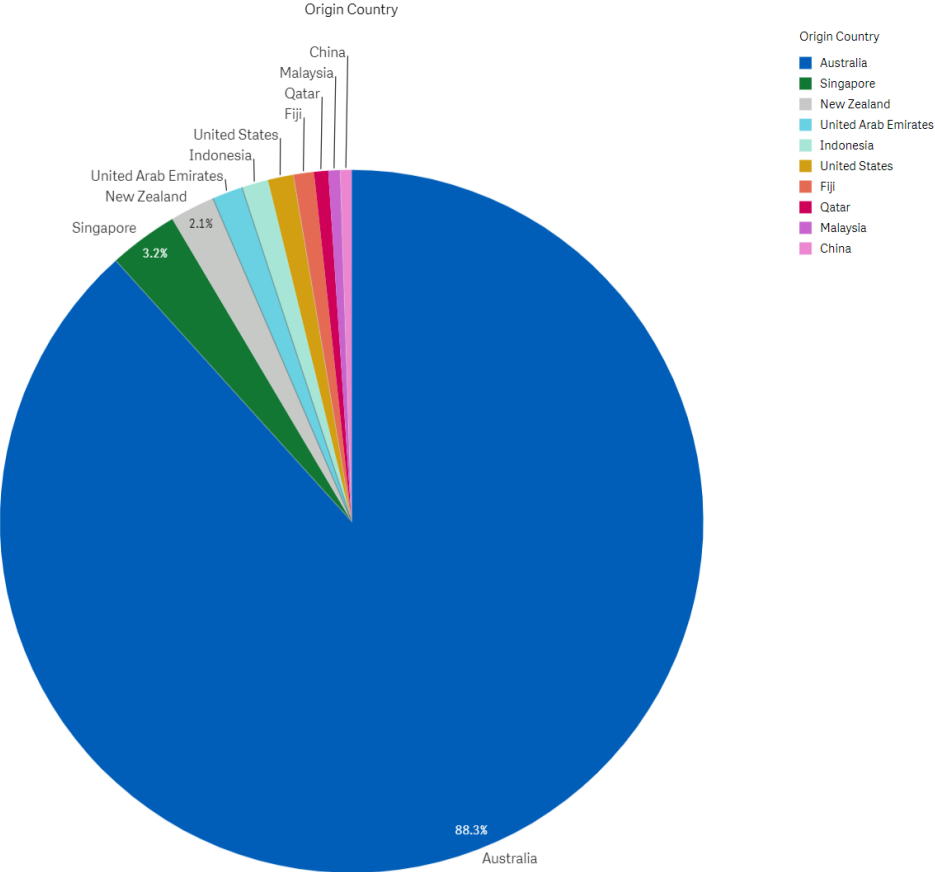


Source of Flights - Australia

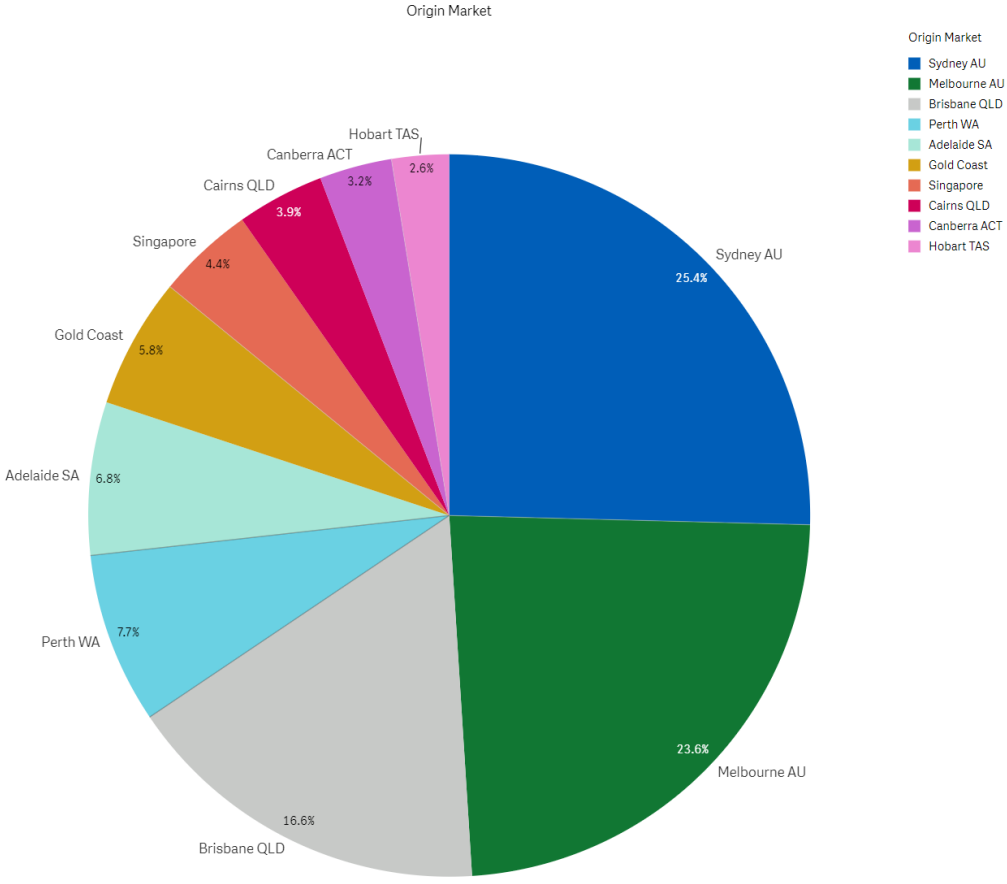
Extract Date: Apr/24/2022 (as of date is 3 days prior)

- _ Flights into Australia for May, June, July 2022
- _ 88.3% Domestic Travel with Sydney, Melbourne and Brisbane leading the Travel Bookings

Top 10 Origin Country, Current Total Seats for Destination Market Selected



Top 10 Origin Market, Current Total Seats for Destination Market Selected



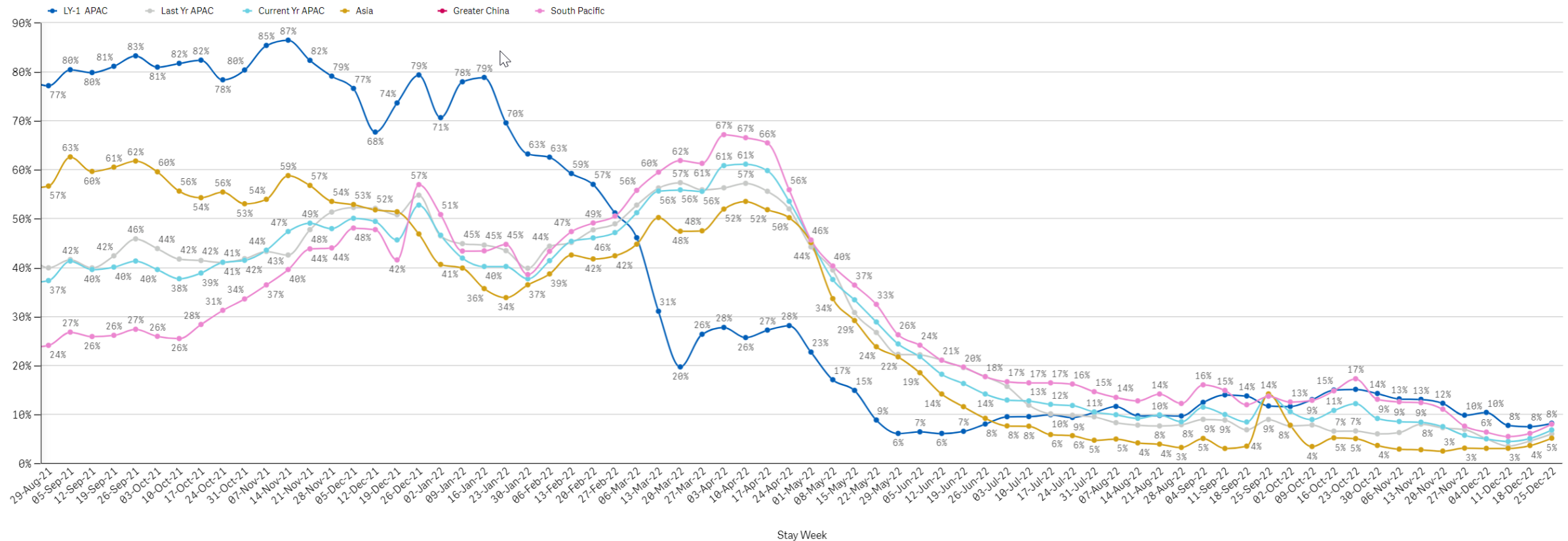
Demand360 – Occupancy by APAC Region

Extract Date: Apr/24/2022 (as of date is 3 days prior)

_ APAC Current Yr (light blue) in April exceeded Last Yr Occupancy and forward pace looking more positive

_ South Pacific achieving higher occupancies presently (pink)

Occupancy by APAC Region



Demand360 – Hotels, Australia | Last Year vs Current (YTD)

Extract Date: Apr/24/2022 (as of date is 3 days prior)

_ Australia YTD holding more occupancy than LY and LY-1 with ADR stronger

Demand Summary - Current

Total	Group	Transient	ADR (USD)	RevPAR (USD)
54.6%	9.4%	43.2%	\$210	\$114
As of Week Ago	As of Week Ago	Transient As of Week Ago		
53.7%	9.5%	42.3%		

Demand Summary - Last Year

Total	Group	Transient	ADR (USD)	RevPAR (USD)
47.7%	7.2%	36.1%	\$184	\$88
As of Week Ago	Group As of Week Ago	As of Week Ago		
0.0%	0.0%	0.0%		

Demand Summary LY-1

Total	Group	Transient	ADR (USD)	RevPAR (USD)
51.7%	12.0%	37.7%	\$162	\$84

Default: Australia for YTD as at Apr/24/2022 to same period 2021, 2020

Demand360 – Hotels, Australia | Last Year vs Current (March / April)

Extract Date: Apr/24/2022 (as of date is 3 days prior)

– March and April 2022 holding 64.4% occupancy

Demand Summary - Current

Total	Group	Transient	ADR (USD)	RevPAR (USD)
64.4%	10.7%	51.7%	\$213	\$136
As of Week Ago	As of Week Ago	Transient As of Week Ago		
62.5%	10.9%	49.7%		

Demand Summary - Last Year

Total	Group	Transient	ADR (USD)	RevPAR (USD)
55.3%	7.1%	43.6%	\$186	\$102
As of Week Ago	Group As of Week Ago	As of Week Ago		
0.0%	0.0%	0.0%		

Demand Summary LY-1

Total	Group	Transient	ADR (USD)	RevPAR (USD)
25.3%	10.0%	14.3%	\$124	\$31

Default: Australia for March and April 2022 as at Apr/24/2022 to same period 2021, 2020

Demand360 – Hotels, Australia | Last Year vs Current (May)

Extract Date: Apr/24/2022 (as of date is 3 days prior)

_ May 2022 continues this trend sitting at 38% occupancy with and ADR of USD \$216

Demand Summary - Current				
Total	Group	Transient	ADR (USD)	RevPAR (USD)
38.0%	15.8%	21.8%	\$216	\$60
As of Week Ago	As of Week Ago	Transient As of Week Ago		
34.0%	15.4%	18.3%		
Demand Summary - Last Year				
Total	Group	Transient	ADR (USD)	RevPAR (USD)
31.3%	11.3%	18.3%	\$199	\$46
As of Week Ago	Group As of Week Ago	As of Week Ago		
0.0%	0.0%	0.0%		
Demand Summary LY-1				
Total	Group	Transient	ADR (USD)	RevPAR (USD)
8.9%	6.3%	2.6%	\$110	\$6

Default: Australia for May 2022 as at Apr/24/2022 to same period 2021, 2020

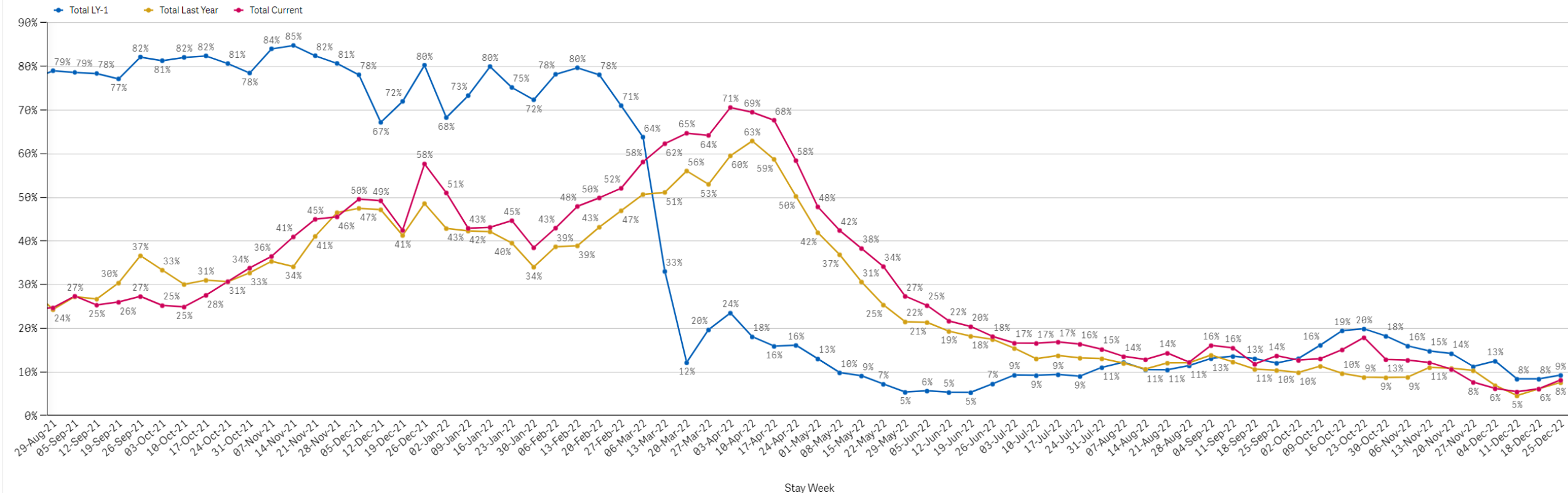
Demand360 – Occupancy LY-1 vs Last Year vs Current

Extract Date: Apr/24/2022 (as of date is 3 days prior)

- Occupancy climbed as at end of February 2022
- March / April 2022 showed solid Occupancies and growth in comparison to LY

Occupancy - LY-1 vs Last Year vs Current

Market: Australia

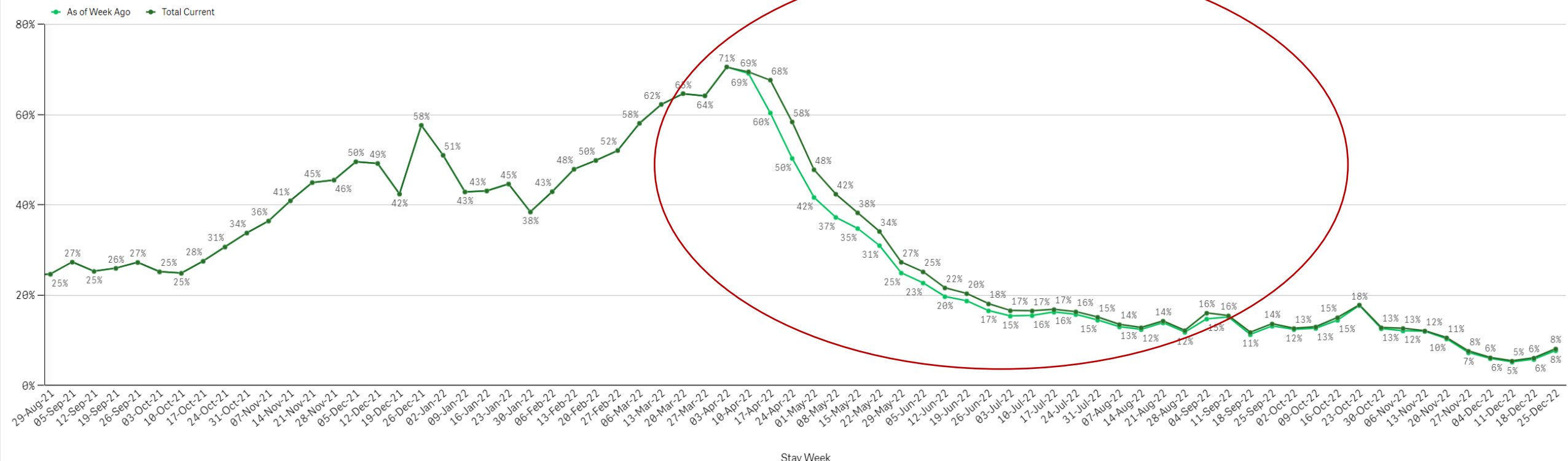


Demand360 – Occupancy as of a Week Ago vs Current

Extract Date: Apr/24/2022 (as of date is 3 days prior)

_Forward Pace showing longer lead times are beginning to come back

Occupancy - As of a Week Ago vs Current
Market: Australia



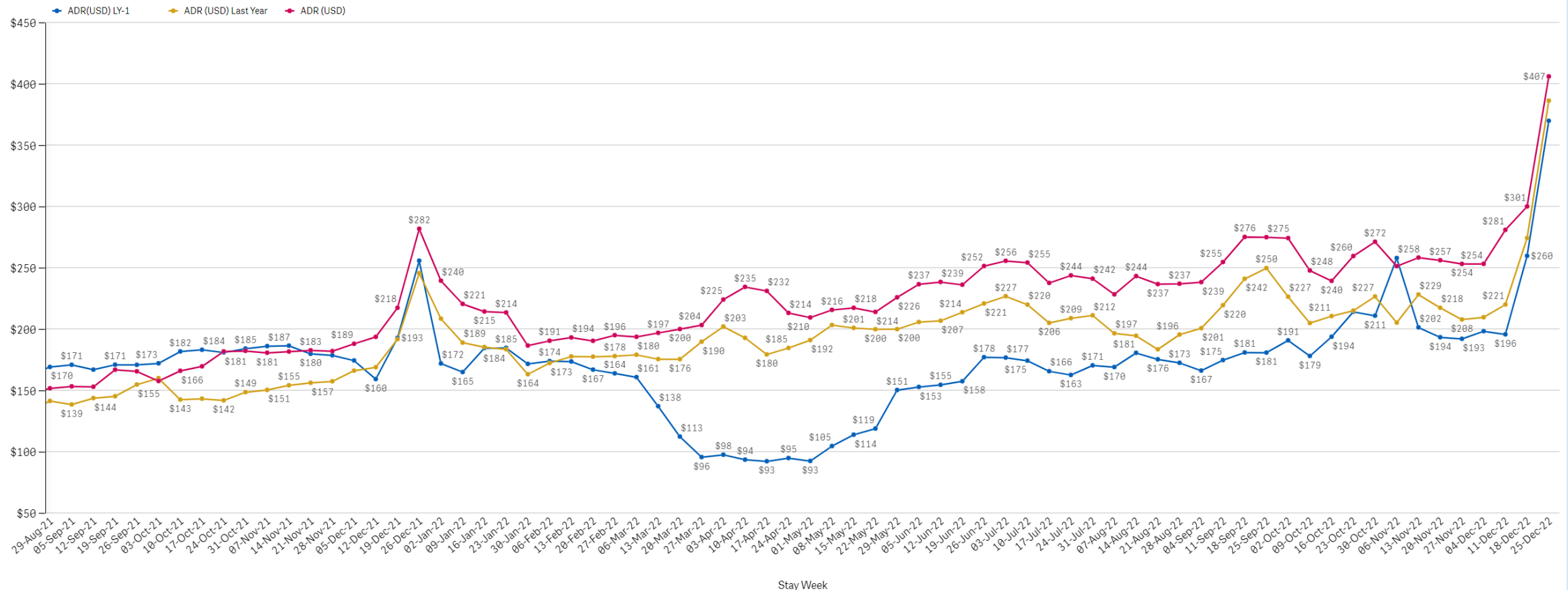
Demand360 – ADR LY-1 vs Last Year vs Current

Extract Date: Apr/24/2022 (as of date is 3 days prior)

ADR (Note: reflected in USD) holding higher than LY-1 and LY since end of 2021

ADR LY-1 vs Last Year vs Current

Market: Australia



Demand360 – Occupancy % by Booking Channel

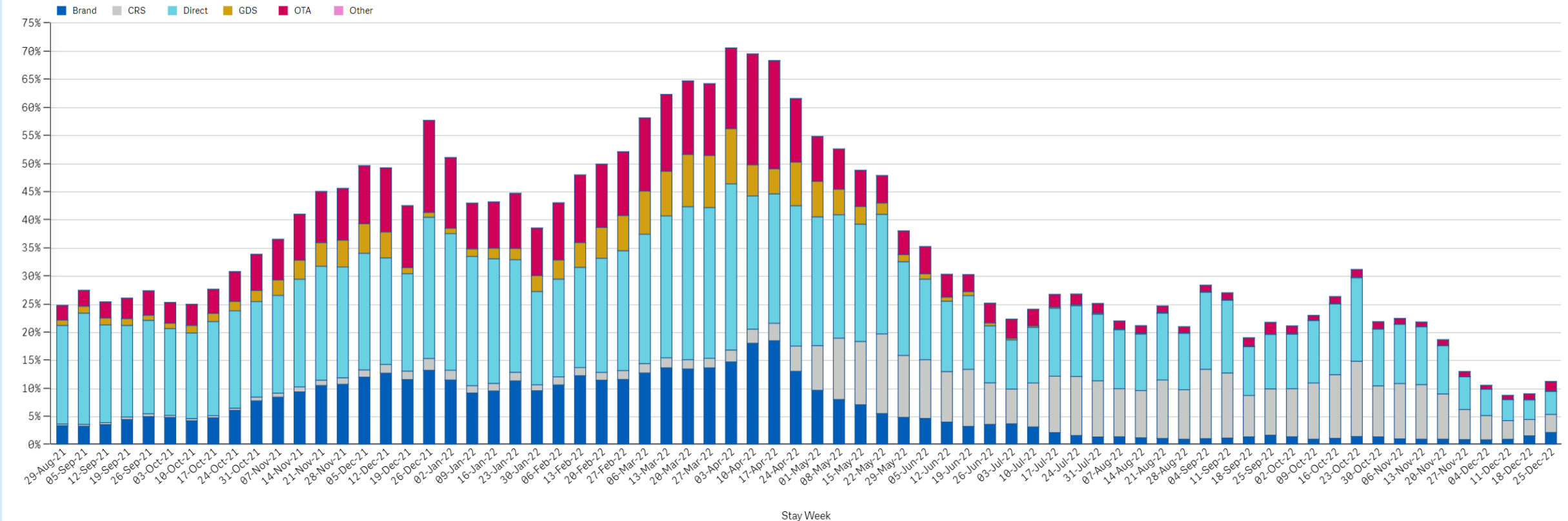
Extract Date: Apr/24/2022 (as of date is 3 days prior)

_ Direct largest Occupancy % by Booking Channel

_ OTA's and GDS now growing in % Share (note: CRS = Call Centre)

Occupancy % by Booking Channel

Market: Australia

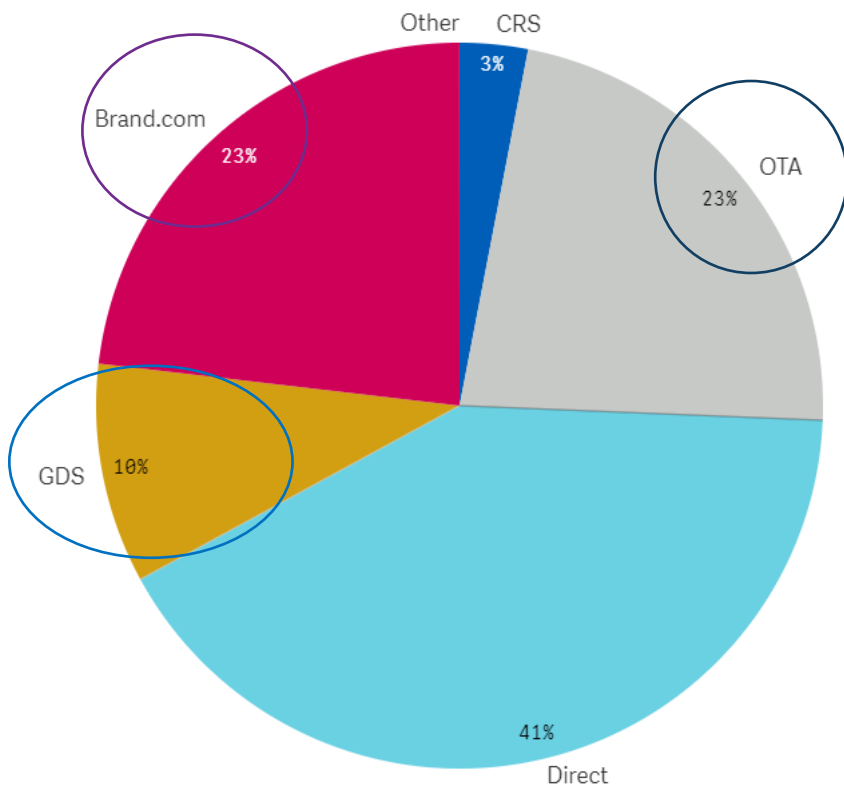


Demand360 – Room Nights Booking Channel Mix (YTD)

Extract Date: Apr/24/2022 (as of date is 3 days prior)

Current Year Room Nights Booking Channel Mix

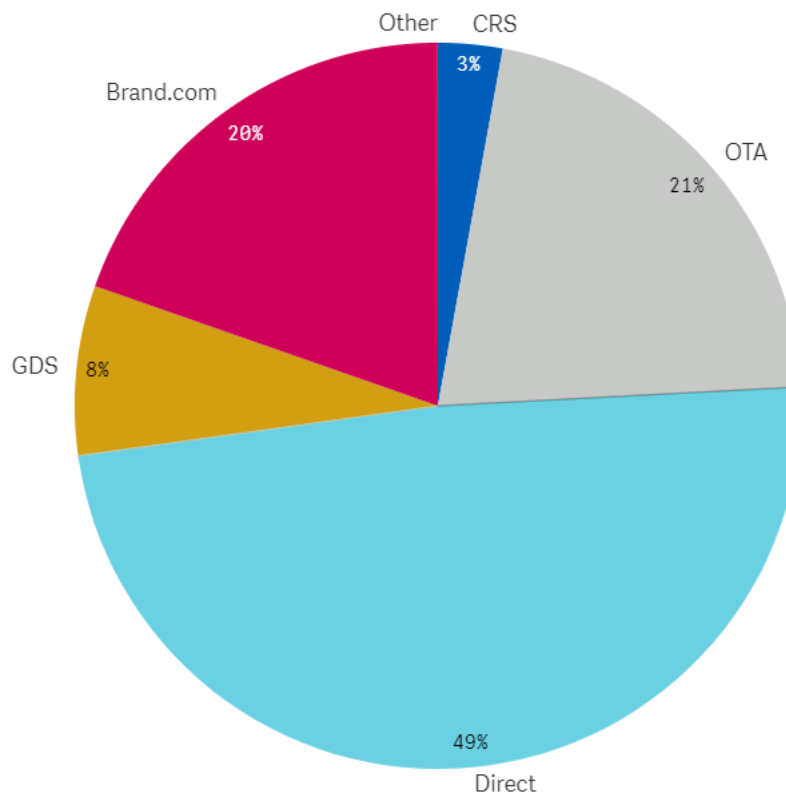
Market: Australia



Last Year Room Nights Booking Channel Mix

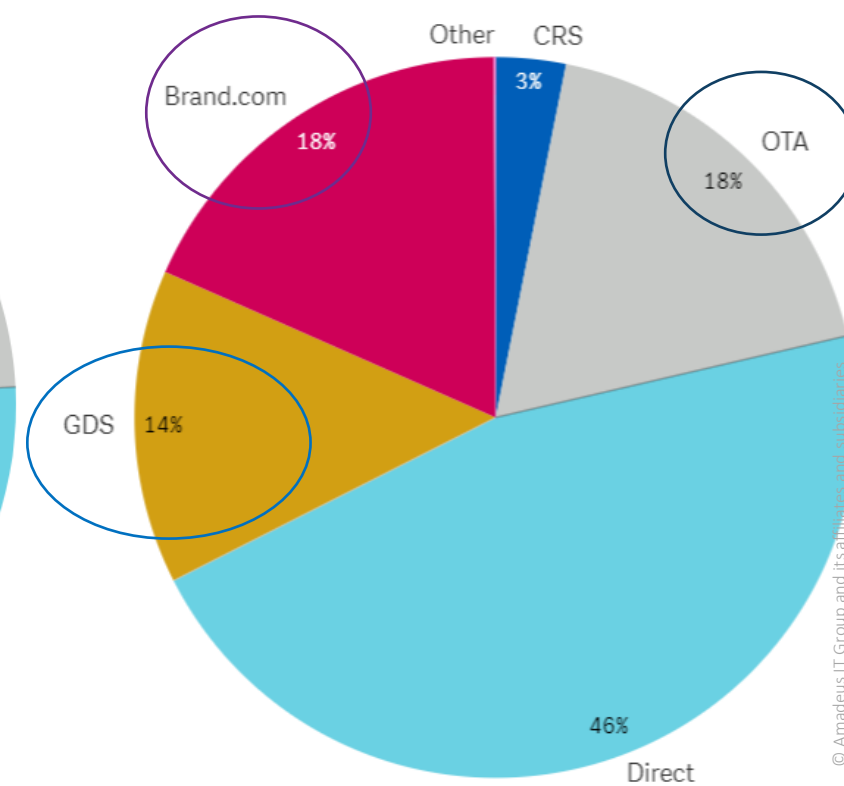
Market: Australia

■ CRS ■ OTA ■ Direct ■ GDS ■ Brand.com ■ Other



LY-1 Room Nights Booking Channel Mix

Market: Australia



Default: Australia for YTD as at Apr/24/2022 to same period 2021, 2020

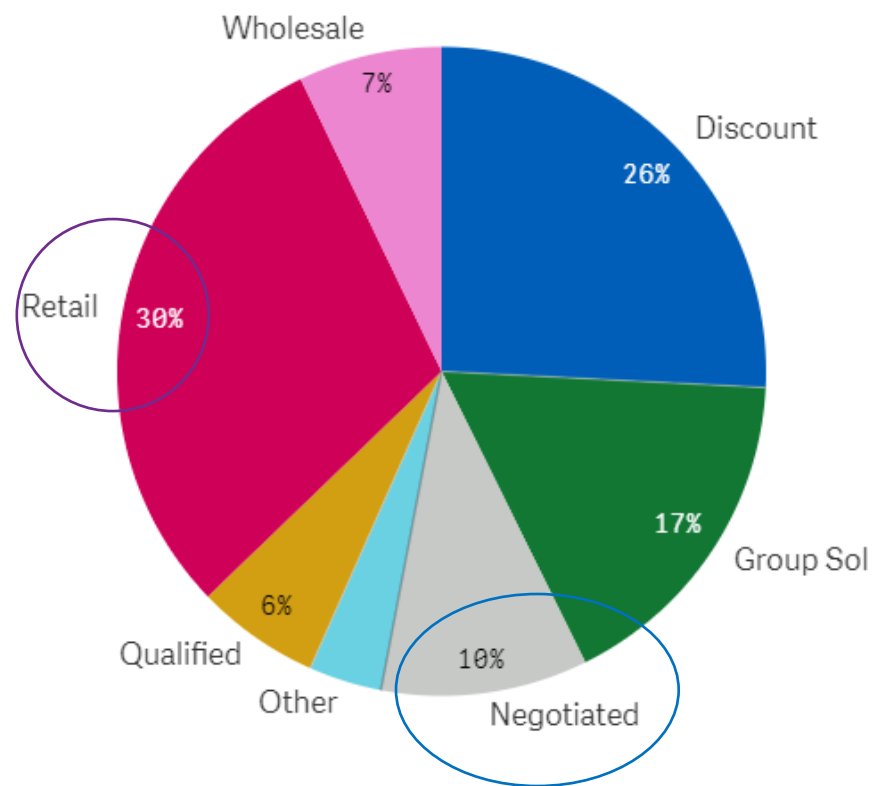
AMADEUS

Demand360 – Room Nights Booking Market Segment Mix (YTD)

Extract Date: Apr/24/2022 (as of date is 3 days prior)

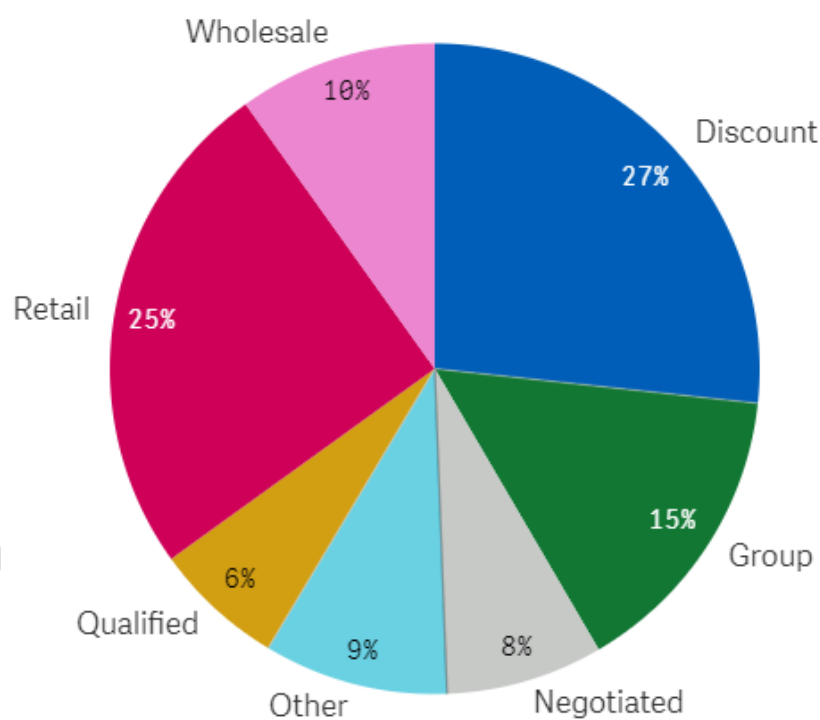
Current Year Room Nights Market Segment Mix

Market: Australia



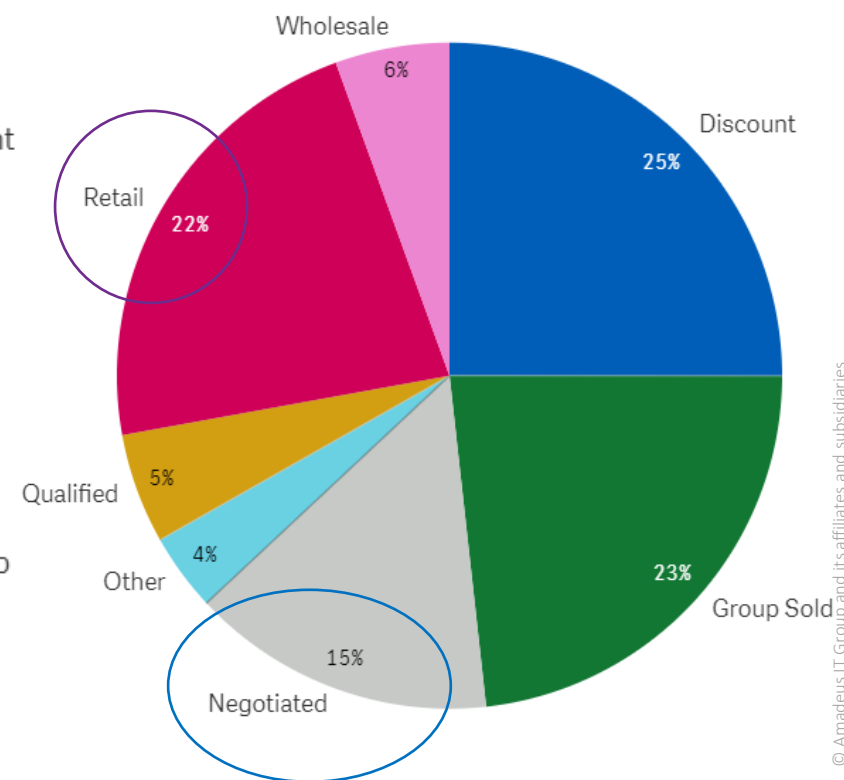
Last Year Room Nights Market Segment Mix

Market: Australia



LY-1 Room Nights Market Segment Mix

Market: Australia



© Amadeus IT Group and its affiliates and subsidiaries

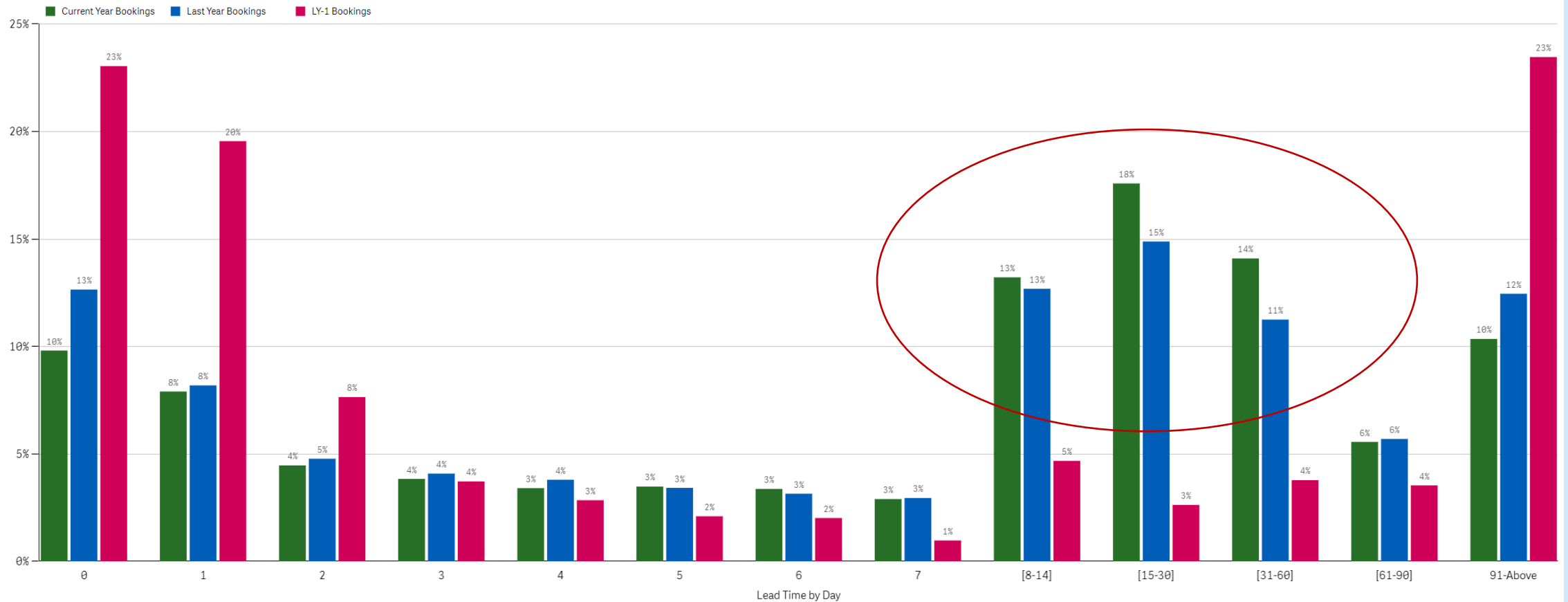
Demand360 – Booking Lead Time Market Summary

Extract Date: Apr/24/2022 (as of date is 3 days prior)

_Lead Time growth 8-14 / 15-30 / 31-60

Booking Lead Time Market Summary

Market: Australia



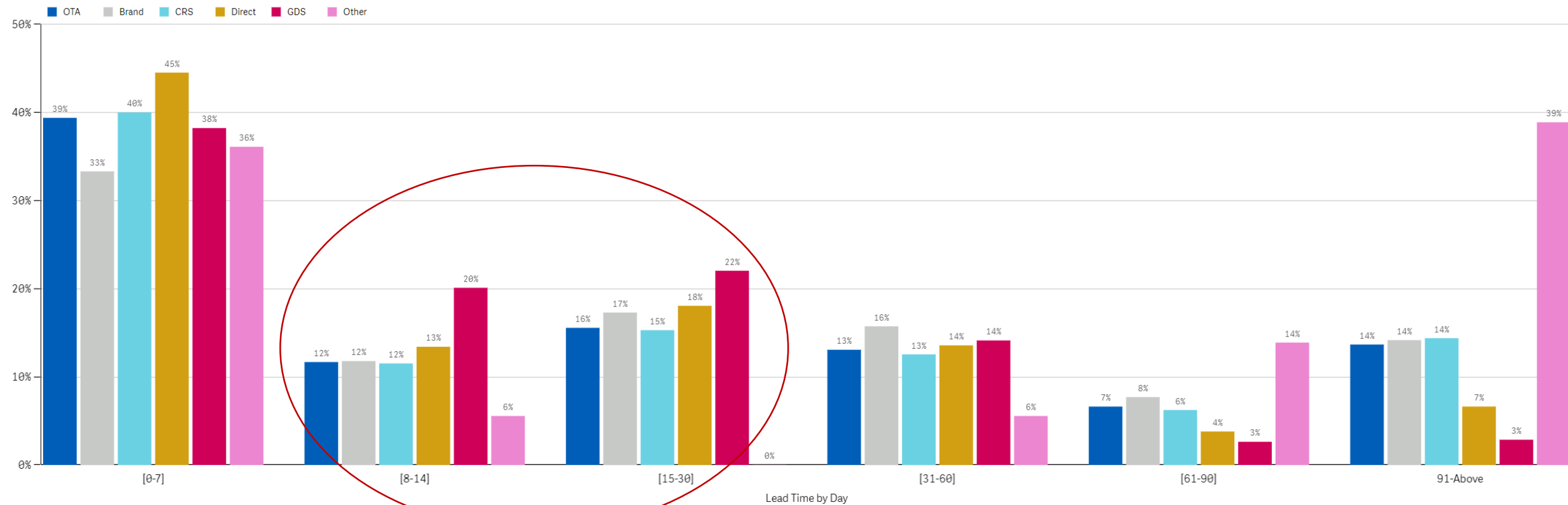
Demand360 – Booking Lead Time by Booking Channel

Extract Date: Apr/24/2022 (as of date is 3 days prior)

_GDS Channel showing movement and lengthening of Booking Lead Time

Booking Lead Time by Booking Channel

Market: Australia



Demand360 – Booking Lead Time by Market Segment

Extract Date: Apr/24/2022 (as of date is 3 days prior)

_Group / Negotiated showing movement and lengthening of Booking Lead Time

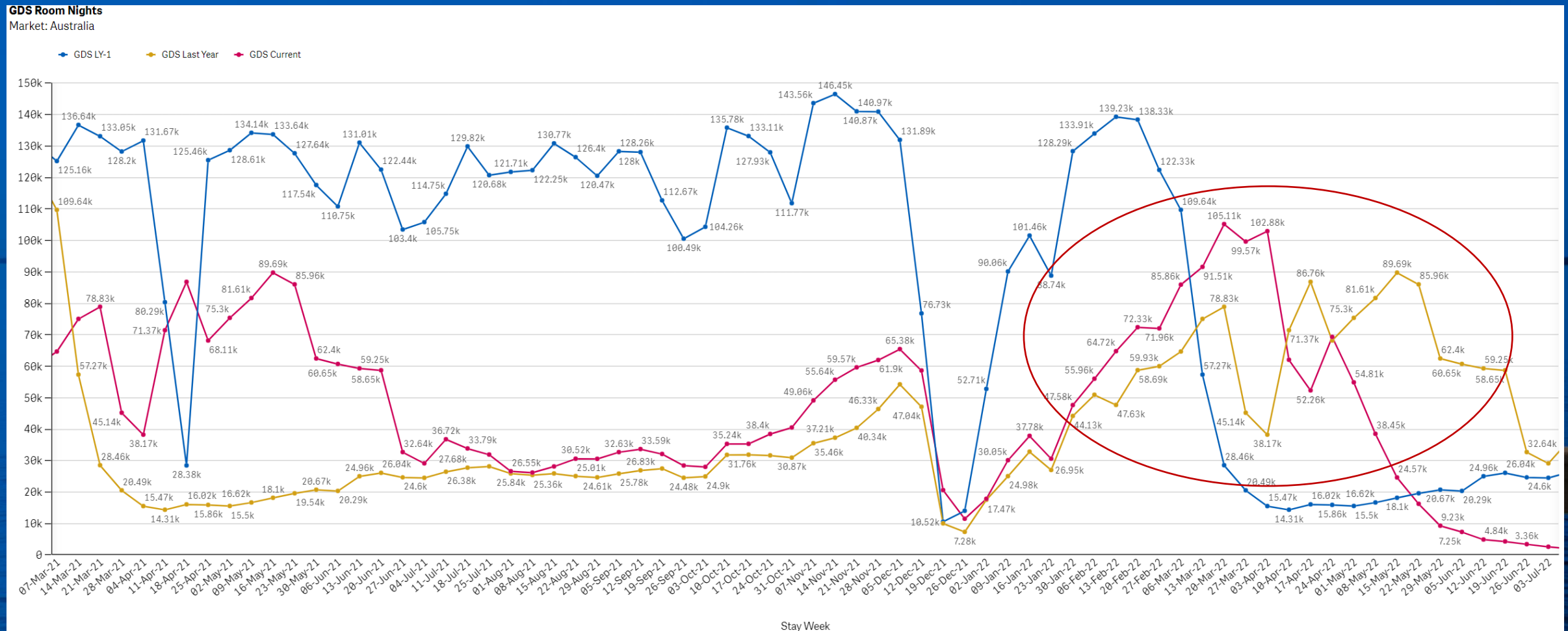


Demand360 – GDS Room Nights, Australia

Extract Date: Apr/24/2022 (as of date is 3 days prior)

_ GDS Channel has showed strong growth since end of February 2022

_ Corporate market is returning, and recovery is taking place



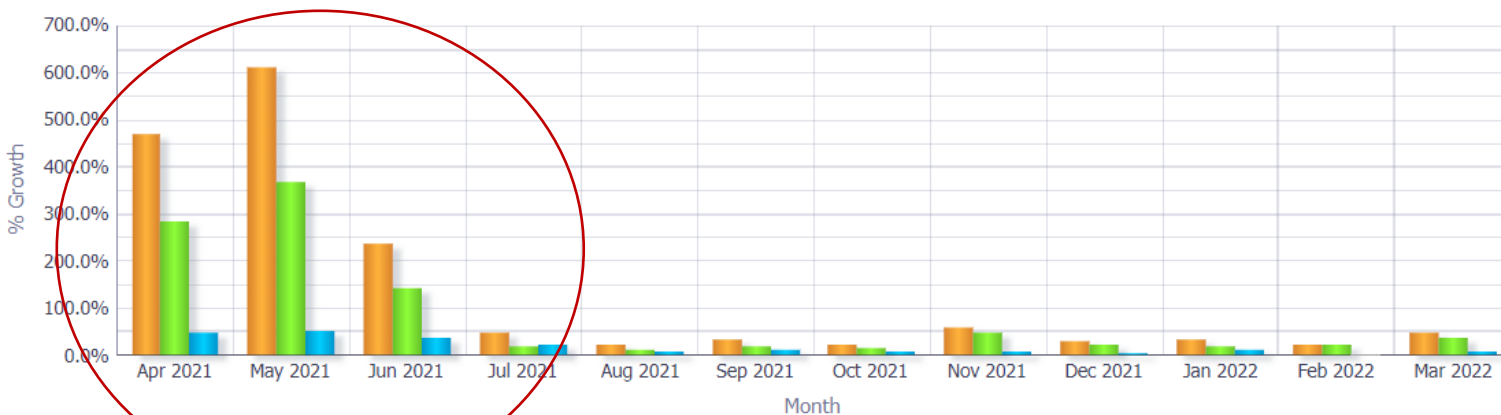
GDS – Revenue, Room Nights, ADR: Australia

Extract Date: Apr/27/2022

- April, May, June 22 showing strong % Growth
- Currently higher proportion of Non-Negotiated booking over Negotiated Rate Category

	Apr 2021	May 2021	Jun 2021	Jul 2021	Aug 2021	Sep 2021	Oct 2021	Nov 2021	Dec 2021	Jan 2022	Feb 2022	Mar 2022	Total
Revenue													
Revenue	41,465,596	55,264,291	38,247,928	20,657,770	17,208,708	19,298,384	20,253,597	32,293,025	28,495,321	20,898,329	35,975,444	67,693,473	397,751,865
Year Ago	7,275,671	7,803,305	11,409,338	14,017,028	13,921,843	14,594,995	16,535,849	20,344,500	21,873,951	15,825,612	29,093,941	46,094,414	218,790,446
Growth	469.9%	608.2%	235.2%	47.4%	23.6%	32.2%	22.5%	58.7%	30.3%	32.1%	23.7%	46.9%	81.8%
Room Nights													
Room Nights	268,614	352,884	248,049	141,899	125,730	138,287	145,705	230,349	188,395	129,952	247,857	424,669	2,642,390
Year Ago	69,844	75,277	101,902	118,005	111,455	115,130	128,250	155,732	152,003	108,122	203,021	312,750	1,651,491
Growth	284.6%	368.8%	143.4%	20.2%	12.8%	20.1%	13.6%	47.9%	23.9%	20.2%	22.1%	35.8%	60.0%
ADR													
ADR	154	157	154	146	137	140	139	140	151	161	145	159	151
Year Ago	104	104	112	119	125	127	129	131	144	146	143	147	132
Growth	48.2%	51.1%	37.7%	22.6%	9.6%	10.1%	7.8%	7.3%	5.1%	9.9%	1.3%	8.2%	13.6%

% Growth (Revenue, Room Nights, ADR)



Future Bookings for the Market (Current Month and Next 3 Months)
Revenue, Room Nights and ADR

	Apr 2022	May 2022	Jun 2022	Jul 2022
Revenue				
Revenue	53,928,467	35,698,241	5,732,666	2,324,319
Year Ago	40,956,995	20,098,791	3,690,509	1,640,119
Growth	31.7%	77.6%	55.3%	41.7%
Room Nights				
Room Nights	316,175	214,454	31,664	10,771
Year Ago	267,345	123,090	19,215	7,185
Growth	18.3%	74.2%	64.8%	49.9%
ADR				
ADR	171	166	181	216
Year Ago	153	163	192	228
Growth	11.3%	1.9%	(5.7%)	(5.5%)



Demand360 – Hotels, New Zealand | Last Year vs Current (YTD)

Extract Date: May/01/2022 (as of date is 3 days prior)

_ New Zealand YTD holding less occupancy than LY and LY-1 with ADR weaker

Demand Summary - Current

Total	Group	Transient	ADR (USD)
40.0%	16.6%	22.7%	\$137
As of Week Ago	As of Week Ago	Transient As of Week Ago	
39.7%	16.5%	22.4%	

Demand Summary - Last Year

Total	Group	Transient	ADR (USD)
54.3%	30.2%	23.7%	\$147
As of Week Ago	Group As of Week Ago	As of Week Ago	
0.0%	0.0%	0.0%	

Demand Summary LY-1

Total	Group	Transient	ADR (USD)
52.5%	15.7%	35.1%	\$156

Demand360 – Hotels, New Zealand | Last Year vs Current (March / April)

Extract Date: May/01/2022 (as of date is 3 days prior)

_ March and April 2022 held 35.1% occupancy

Demand Summary - Current				
Total	Group	Transient	ADR (USD)	RevPAR (USD)
35.1%	10.5%	23.7%	\$132	\$46
As of Week Ago	As of Week Ago	Transient As of Week Ago		
34.5%	10.4%	23.1%		
Demand Summary - Last Year				
Total	Group	Transient	ADR (USD)	RevPAR (USD)
53.7%	28.9%	24.3%	\$146	\$79
As of Week Ago	Group As of Week Ago	As of Week Ago		
0.0%	0.0%	0.0%		
Demand Summary LY-1				
Total	Group	Transient	ADR (USD)	RevPAR (USD)
24.6%	9.8%	13.7%	\$119	\$29

Demand360 – Hotels, New Zealand | Last Year vs Current (May)

Extract Date: May/01/2022 (as of date is 3 days prior)

_ May 2022 continues this trend sitting at 25.7% occupancy with and ADR of USD \$134

Demand Summary - Current

Total	Group	Transient	ADR (USD)	RevPAR (USD)
25.7%	6.9%	18.2%	\$134	\$48
As of Week Ago	As of Week Ago	Transient As of Week Ago		
19.3%	4.2%	14.5%		

Cancel

Demand Summary - Last Year

Total	Group	Transient	ADR (USD)	RevPAR (USD)
34.8%	17.5%	16.9%	\$154	\$49
As of Week Ago	Group As of Week Ago	As of Week Ago		
0.0%	0.0%	0.0%		

Demand Summary LY-1

Total	Group	Transient	ADR (USD)	RevPAR (USD)
14.3%	12.4%	2.0%	\$104	\$13

Default: Australia for May 2022 as at May/01/2022 to same period 2021, 2020

Demand360 – GDS Room Nights, New Zealand

Extract Date: May/01/2022 (as of date is 3 days prior)

_GDS Channel has showed growth heading into May 2022

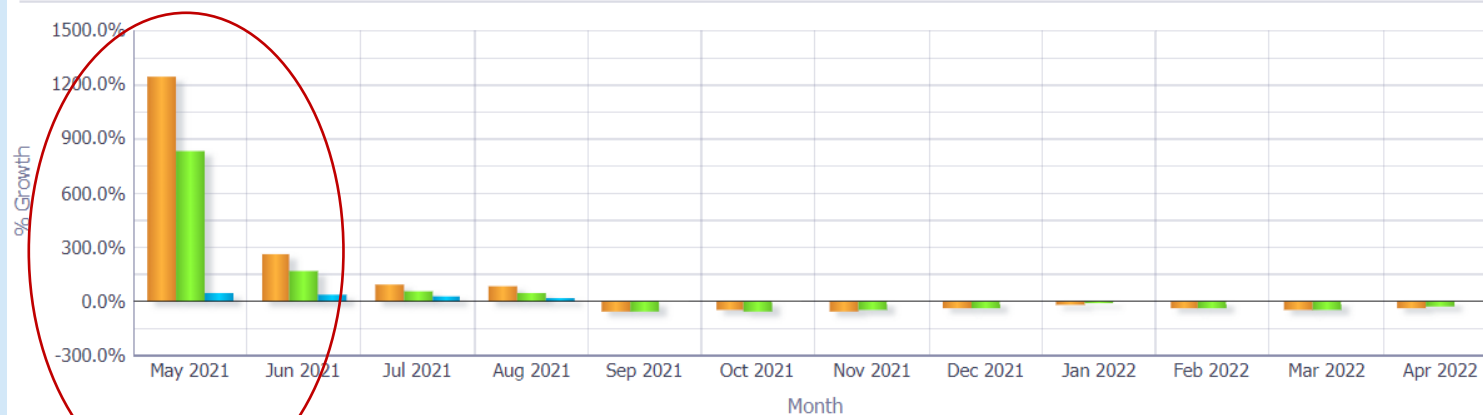


GDS – Revenue, Room Nights, ADR: New Zealand

Extract Date: May/01/2022

	May 2021	Jun 2021	Jul 2021	Aug 2021	Sep 2021	Oct 2021	Nov 2021	Dec 2021	Jan 2022	Feb 2022	Mar 2022	Apr 2022	Total
Revenue													
Revenue	10,898,390	9,897,101	8,828,787	6,132,716	1,997,207	2,812,046	3,687,925	3,049,794	2,906,131	3,192,072	3,994,210	4,457,539	61,853,918
Year Ago	810,096	2,714,315	4,459,522	3,336,932	4,357,941	5,553,010	7,438,808	5,031,708	3,348,465	5,130,207	7,386,718	6,800,048	56,367,770
Growth	1245.3%	264.6%	98.0%	83.8%	(54.2%)	(49.4%)	(50.4%)	(39.4%)	(13.2%)	(37.8%)	(45.9%)	(34.4%)	9.7%
Room Nights													
Room Nights	77,826	72,289	65,818	46,548	16,739	23,550	31,152	35,865	24,423	26,940	32,583	35,920	479,653
Year Ago	8,374	27,032	41,950	30,976	39,690	48,089	60,463	39,880	27,048	39,530	56,770	52,471	472,273
Growth	829.4%	167.4%	56.9%	50.3%	(57.8%)	(51.0%)	(48.5%)	(35.1%)	(9.7%)	(31.8%)	(42.6%)	(31.5%)	1.6%
ADR													
ADR	140	137	134	132	119	119	118	118	119	118	123	124	129
Year Ago	97	100	106	108	110	115	123	126	124	130	130	130	119
Growth	44.8%	36.3%	26.2%	22.3%	8.7%	3.4%	(3.8%)	(6.5%)	(3.9%)	(8.7%)	(5.8%)	(4.2%)	8.0%

% Growth (Revenue, Room Nights, ADR)



— May holding flat YOY for Room Nights, ADR softer

Future Bookings for the Market (Current Month and Next 3 Months)
Revenue, Room Nights and ADR

	May 2022	Jun 2022	Jul 2022	Aug 2022
Revenue				
Revenue	7,470,541	1,294,386	388,716	224,476
Year Ago	7,909,738	1,484,843	549,029	186,420
Growth	(5.6%)	(12.8%)	(29.2%)	20.4%
Room Nights				
Room Nights	58,639	9,779	2,550	1,418
Year Ago	57,991	11,143	3,269	1,164
Growth	1.1%	(12.2%)	(22.0%)	21.8%
ADR				
ADR	127	132	152	158
Year Ago	136	133	168	160
Growth	(6.6%)	(0.7%)	(9.2%)	(1.2%)

Visit our Website to learn more
about Recovery Insights.



www.amadeus-hospitality.com

amadeus

