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Hospitality Market Insights Report

September

RENEW
TRAVEL WITH US

Executive Summary

The **US and Canada** are at or above 2019 hotel occupancy levels for the remainder of the year with strong performances from Group and Brand.com.

Greater China closed July with the highest hotel occupancy rates of the year and strong pick up into August. Groups and Blocks are gaining share month over month and year over year. Direct and Brand channels are also growing share against 2019, but lead time is shrinking with almost 90% of transient bookings being made within a week of arrival.

The rest of Asia is experiencing strong demand through August and September. Singapore is the leading market for September (followed by Melbourne). The Retail and Discount segments have larger shares than in 2019, with Negotiated now at 2019 levels and growing month over month.

Europe had a very strong second half of July, with hotel occupancy levels surpassing 2019 and pacing at the same levels over the next few months. Brand continues to capture more bookings at the expense of OTAs. Groups and Blocks now account for a slightly larger share than same time 2019.

The Middle East ends summer pacing ahead of 2019 for 4 consecutive months, with peaks in November due to worldwide events (F1 in Abu Dhabi, FIFA world cup in Qatar). Of note is an increase in bookings beyond the month of arrival, almost a quarter of which is transient.

Latin America is entering its 5th month in a row with higher occupancy levels compared to the same time in 2019. Pick up is strong heading in September, especially in Cartagena and Rio de Janeiro.
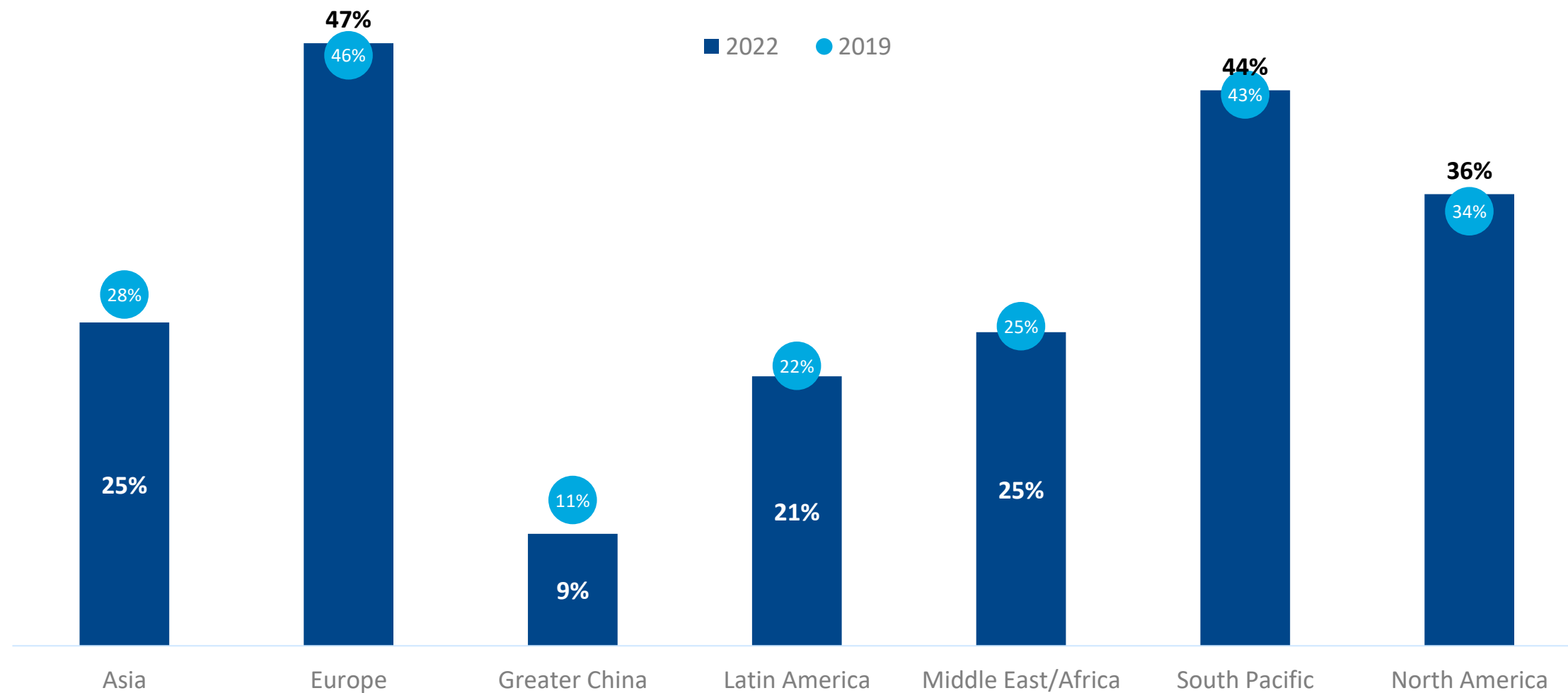
Content

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Occupancy by Region | Worldwide

On-the-books hotel occupancy by region for September 2022 vs same time in 2019.

■ 2022   ● 2019

Region	2022	2019
Asia	25%	28%
Europe	47%	46%
Greater China	9%	11%
Latin America	21%	22%
Middle East/Africa	25%	25%
South Pacific	44%	43%
North America	36%	34%

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Source: Amadeus Demand360® data as of August 18, 2022

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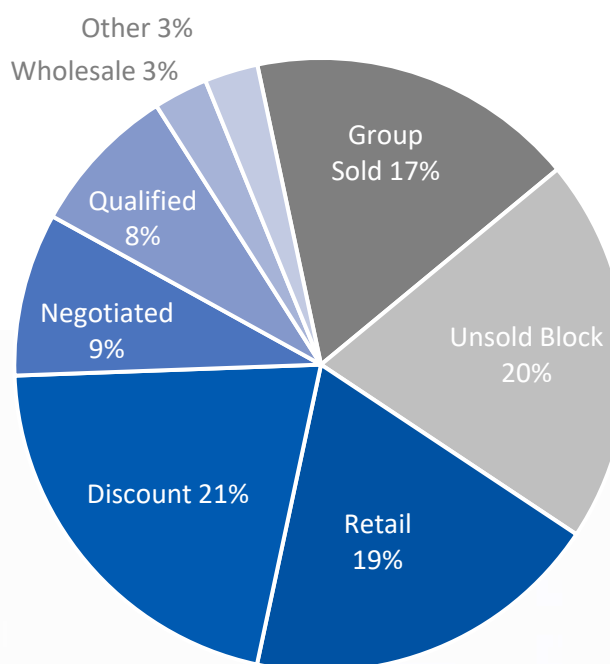
Year-on-Year Segmentation | Worldwide

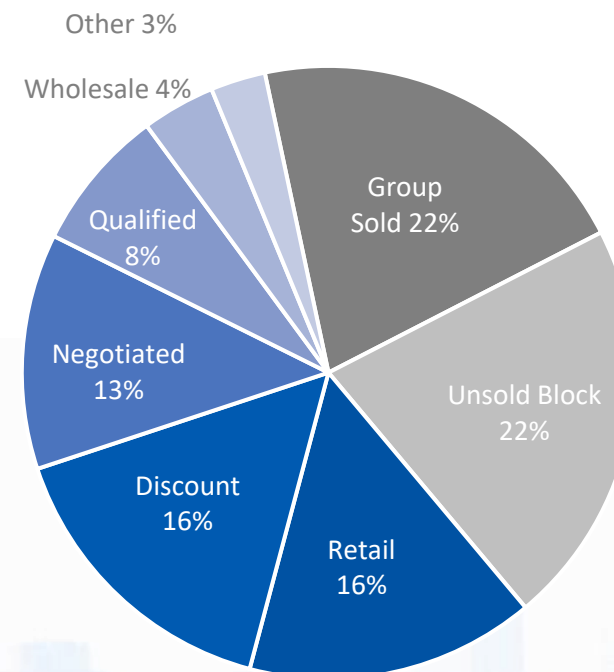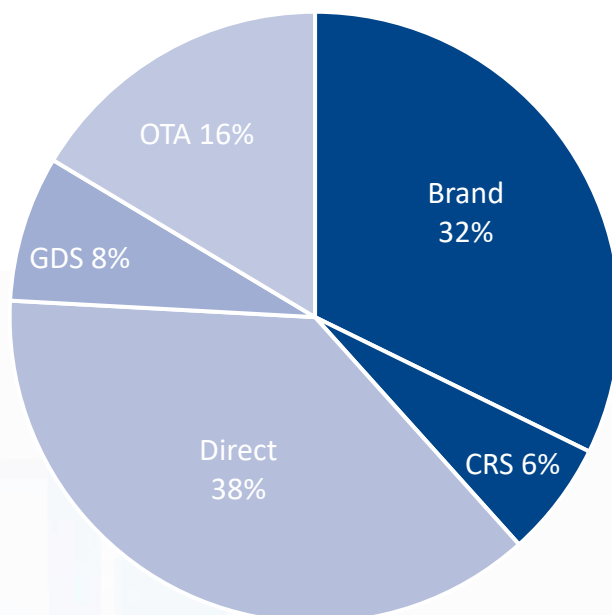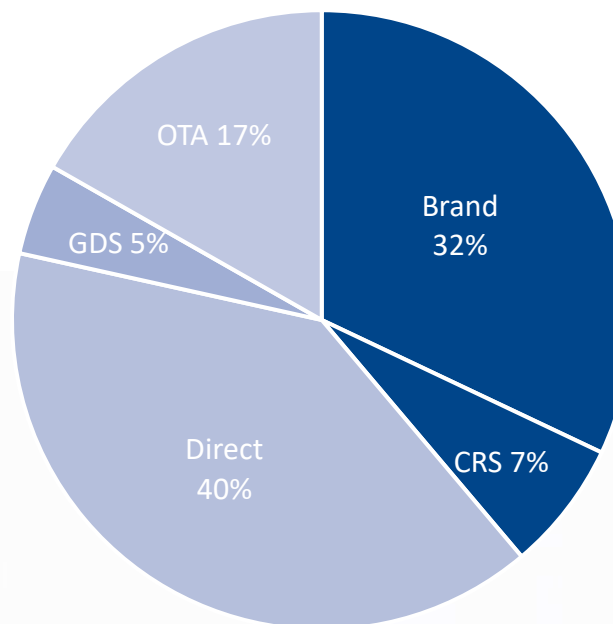On-the-books global market segmentation mix for September 2022 vs same time September 2021 and 2019.

2022

- Group Sold 18%
- Unsold Block 24%
- Retail 17%
- Discount 18%
- Negotiated 10%
- Qualified 7%
- Wholesale 4%
- Other 2%

2021

- Group Sold 17%
- Unsold Block 20%
- Retail 19%
- Discount 21%
- Negotiated 9%
- Qualified 8%
- Wholesale 3%
- Other 3%

2019

- Group Sold 22%
- Unsold Block 22%
- Retail 16%
- Discount 16%
- Negotiated 13%
- Qualified 8%
- Wholesale 4%
- Other 3%

Source: Amadeus Demand360® data as of August 18, 2022

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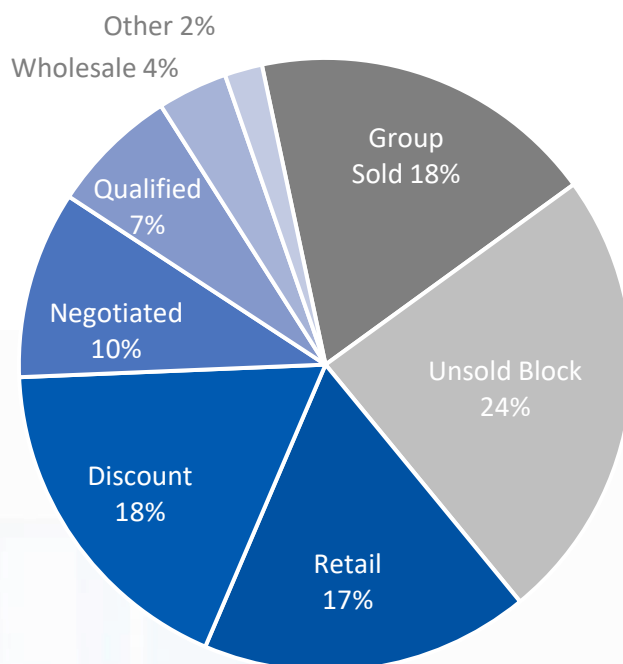
Year-on-Year Channel Mix | Worldwide

On-the-books distribution channel mix for September 2022 vs same time September 2021 and 2019.

2022

Brand
32%

CRS 6%

Direct
38%

GDS 8%

OTA 16%

2021

Brand
32%

CRS 7%

Direct
40%

GDS 5%

OTA 17%

2019

Brand
28%

CRS 8%

Direct
39%

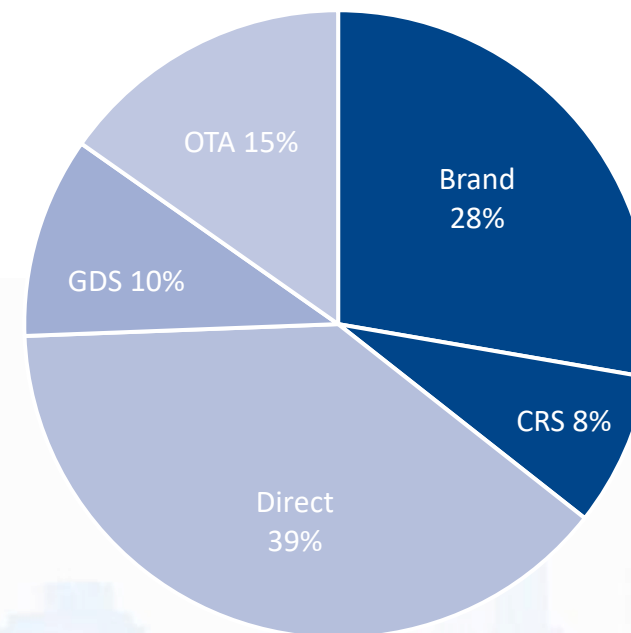GDS 10%

OTA 15%

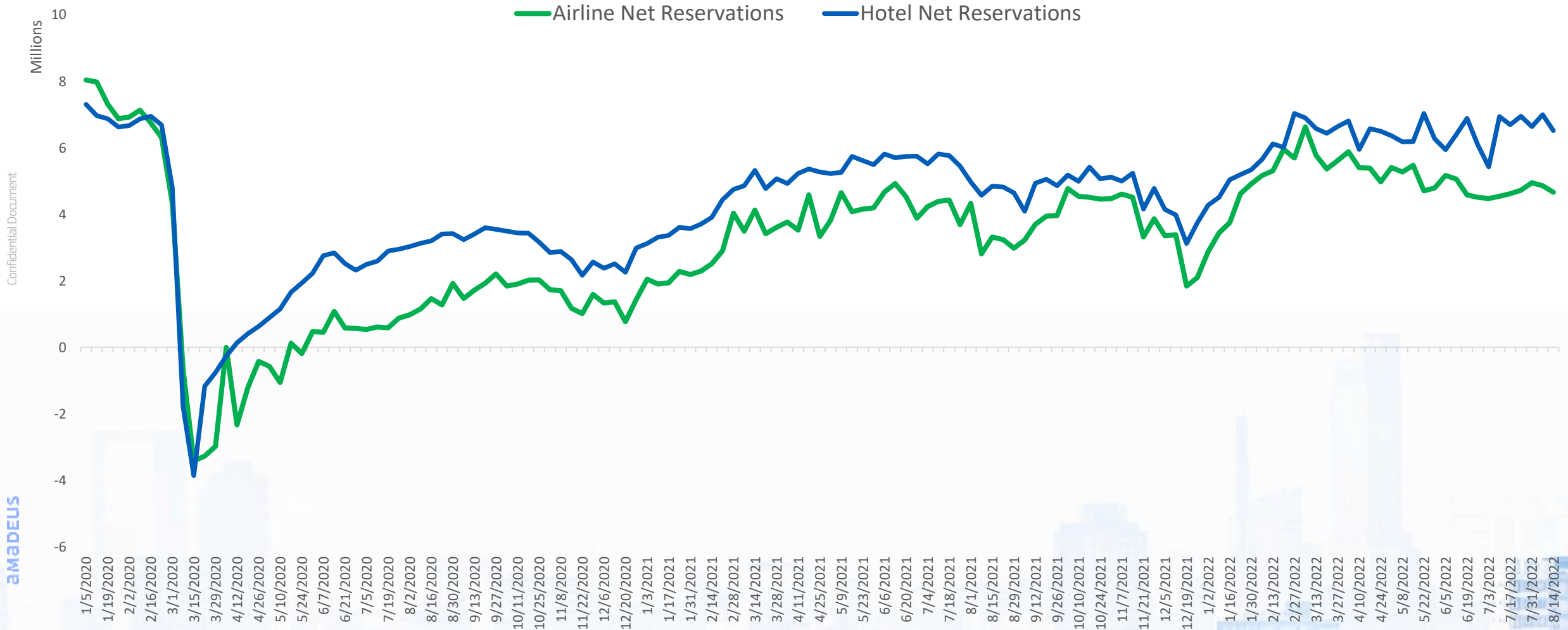Source: Amadeus Demand360® data as of August 18, 2022

United States

Airline & Hotel Net Reservations | United States

Below represents the number of net reservations booked during each week for any future travel period.
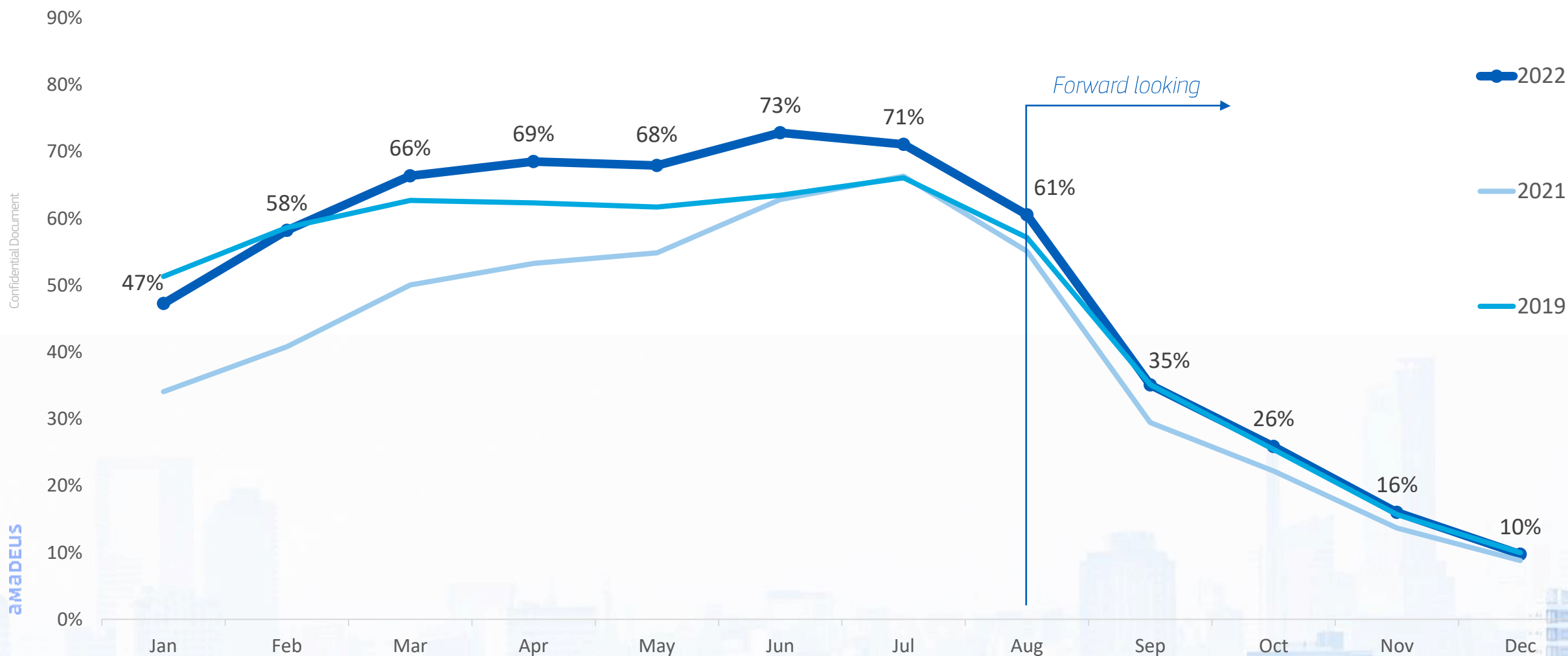

Source: Amadeus Demand360® and GDS Airline Booking Data (MIDT) data as of August 18, 2022

Monthly Occupancy & Year-on-Year Variance | United States

On-the-books occupancy by month compared to 2021 and 2019.

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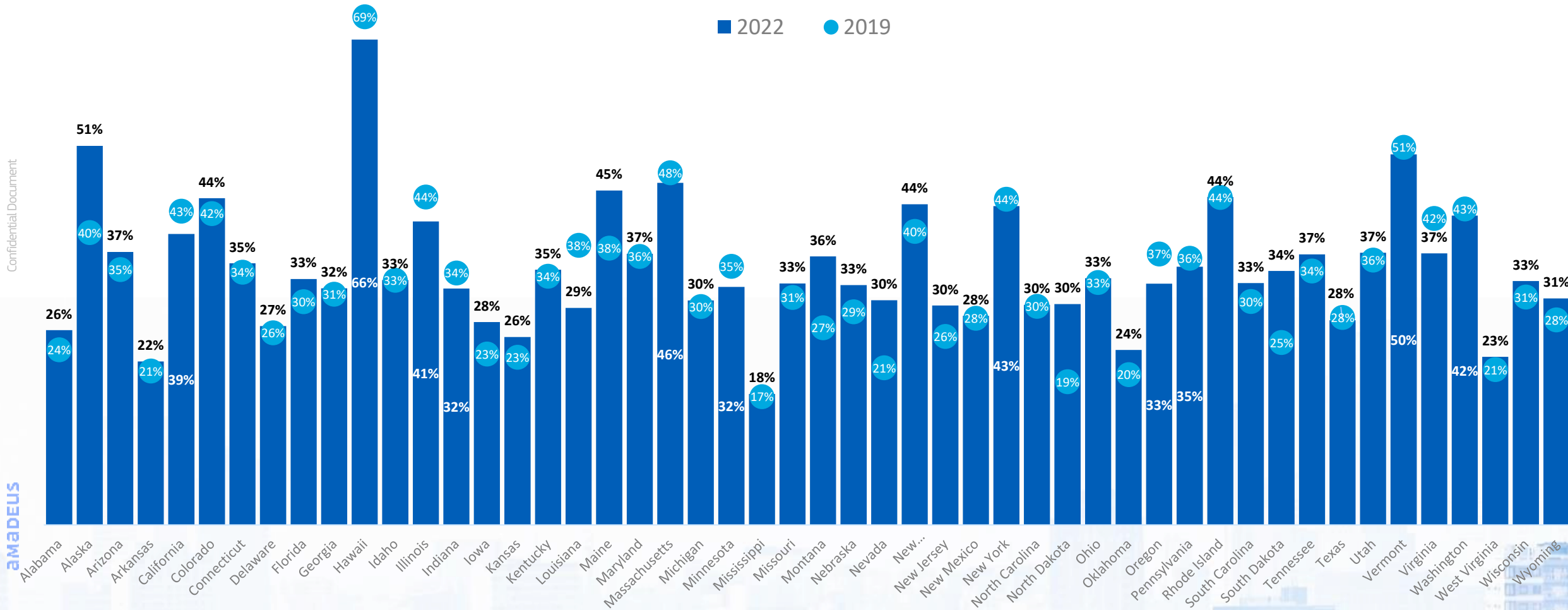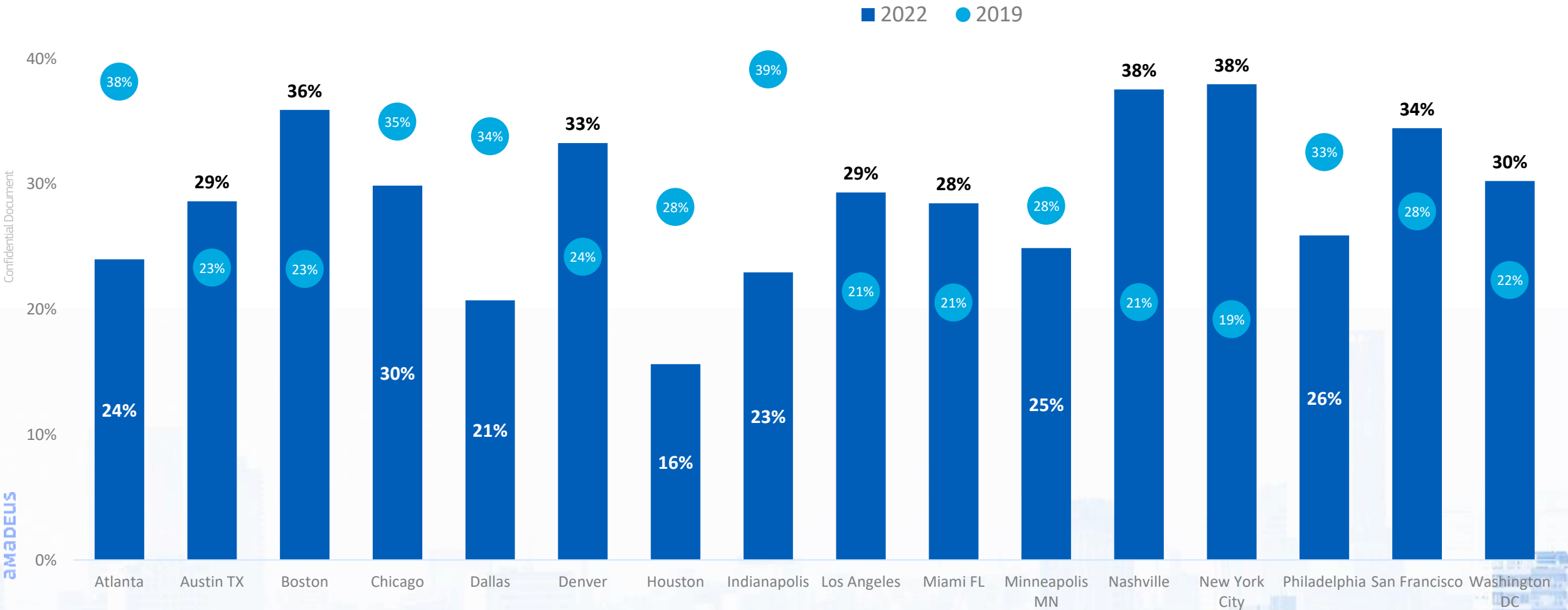
Occupancy & Pace by State | United States

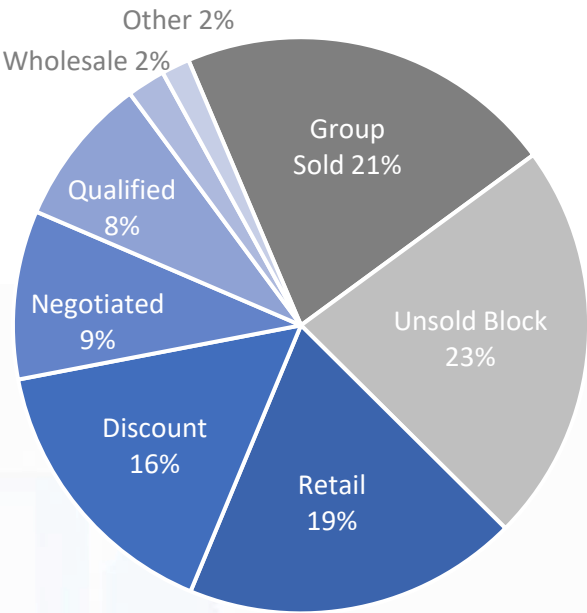On-the-books total occupancy by state for September 2022 vs same time in 2019.

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■ 2022   ● 2019

State	2022	2019
Alabama	26%	24%
Alaska	51%	40%
Arizona	37%	35%
Arkansas	22%	21%
California	39%	43%
Colorado	44%	42%
Connecticut	35%	34%
Delaware	27%	26%
Florida	33%	30%
Georgia	32%	31%
Hawaii	69%	66%
Idaho	33%	33%
Illinois	41%	44%
Indiana	30%	34%
Iowa	28%	23%
Kansas	26%	23%
Kentucky	35%	34%
Louisiana	29%	38%
Maine	45%	38%
Maryland	37%	36%
Massachusetts	46%	48%
Michigan	30%	30%
Minnesota	32%	35%
Mississippi	18%	17%
Missouri	33%	31%
Montana	36%	27%
Nebraska	33%	29%
Nevada	30%	21%
New...	44%	40%
New Jersey	30%	26%
New Mexico	28%	28%
New York	43%	44%
North Carolina	30%	30%
North Dakota	30%	19%
Ohio	33%	33%
Oklahoma	24%	20%
Oregon	33%	37%
Pennsylvania	35%	36%
Rhode Island	44%	44%
South Carolina	33%	30%
South Dakota	34%	25%
Tennessee	37%	34%
Texas	28%	28%
Utah	37%	36%
Vermont	50%	51%
Virginia	37%	42%
Washington	42%	43%
West Virginia	23%	21%
Wisconsin	33%	31%
Wyoming	31%	28%

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Occupancy & Pace by Market | United States

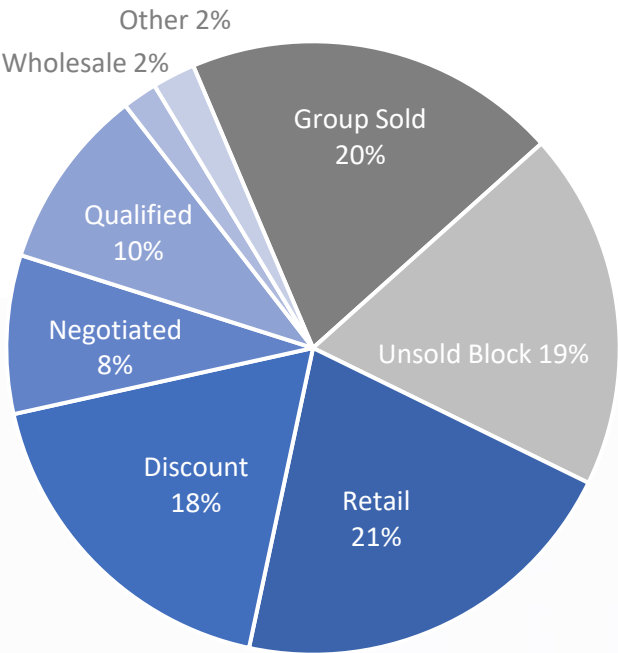On-the-books total occupancy by market for September 2022 and same time in 2019.

■ 2022   ● 2019

Market	2022	2019
Atlanta	24%	38%
Austin TX	29%	23%
Boston	36%	23%
Chicago	30%	35%
Dallas	21%	34%
Denver	33%	24%
Houston	16%	28%
Indianapolis	23%	39%
Los Angeles	29%	21%
Miami FL	28%	21%
Minneapolis MN	25%	28%
Nashville	38%	21%
New York City	38%	19%
Philadelphia	26%	33%
San Francisco	34%	28%
Washington DC	30%	22%

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Year-on-Year Segmentation | United States

On-the-books market segmentation mix for September 2022 vs same time September 2021 and 2019.

2022

- Other 2%
- Wholesale 2%
- Group Sold 21%
- Unsold Block 23%
- Retail 19%
- Discount 16%
- Negotiated 9%
- Qualified 8%

2021

- Other 2%
- Wholesale 2%
- Group Sold 20%
- Unsold Block 19%
- Retail 21%
- Discount 18%
- Negotiated 8%
- Qualified 10%

2019

- Other 3%
- Wholesale 2%
- Group Sold 25%
- Unsold Block 19%
- Retail 17%
- Discount 13%
- Negotiated 12%
- Qualified 10%
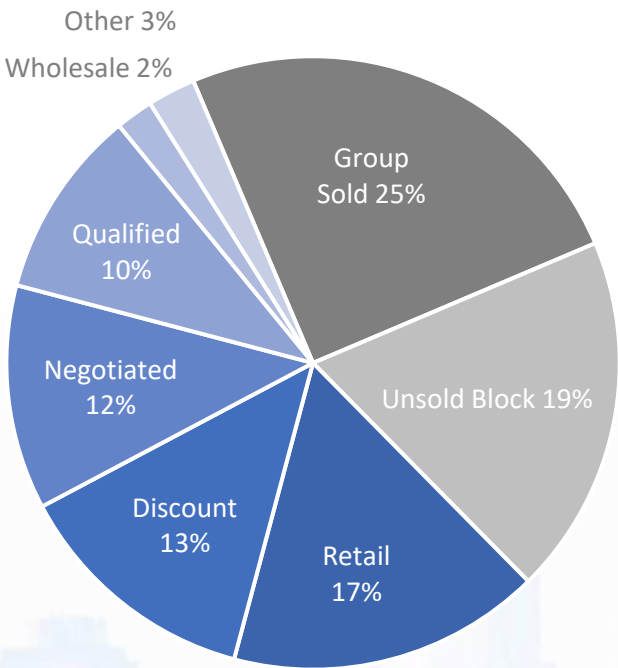
Year-on-Year Channel Mix | United States

On-the-books distribution channel mix for September 2022 vs same time September 2021 and 2019.

2022

2021

2019

Brand 36%
OTA 14%
GDS 8%
CRS 7%
Direct 35%

Brand 35%
OTA 15%
GDS 5%
CRS 8%
Direct 37%

Brand 31%
OTA 12%
GDS 11%
CRS 9%
Direct 36%

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Source: Amadeus Demand360® data as of August 18, 2022

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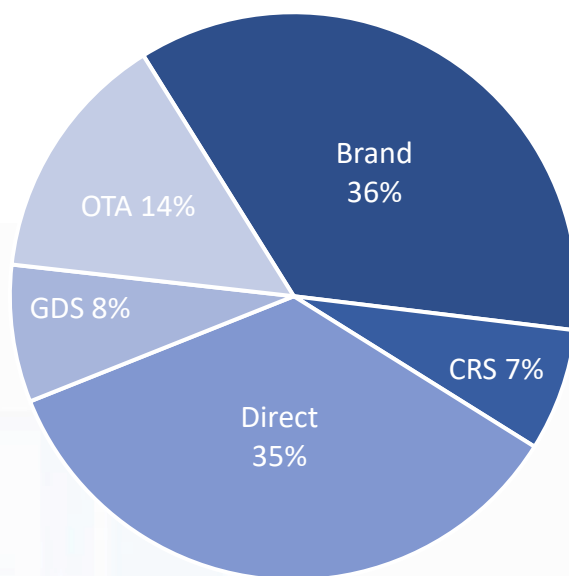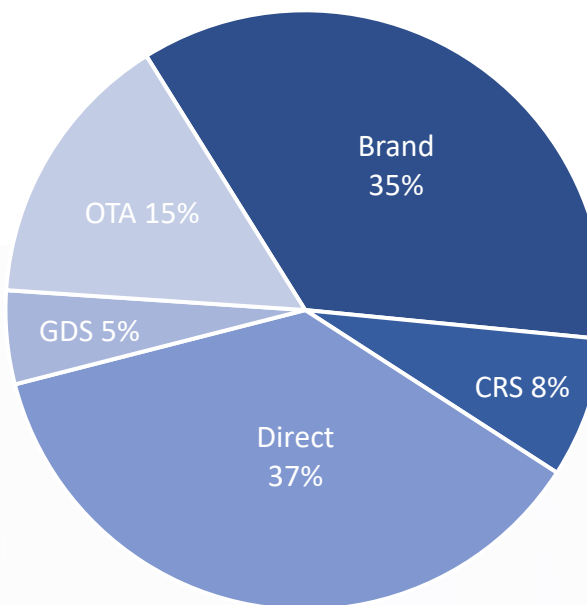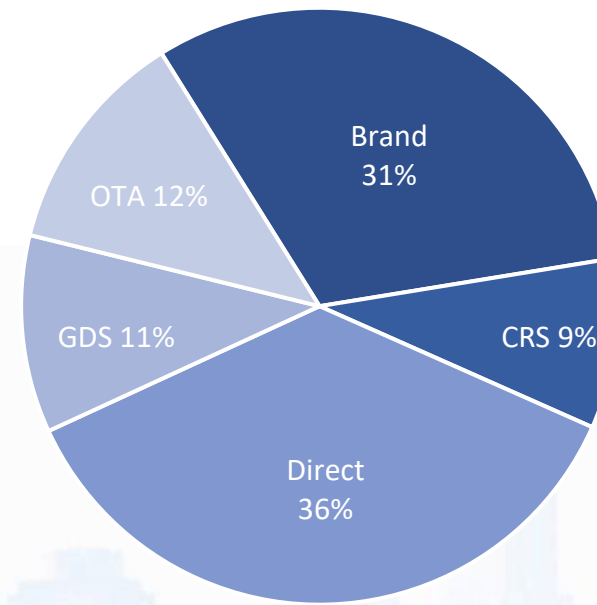
Transient Lead Time by Segment & Channel | United States

Percentage of transient reservations booked by lead time based on the previous 5 weeks of booking activity.

Lead Time by Segment

Legend: All Transient, Discount, Retail, Negotiated, Qualified, Wholesale

Lead Time by Channel

Legend: All Transient, Brand, CRS, OTA, Direct, GDS
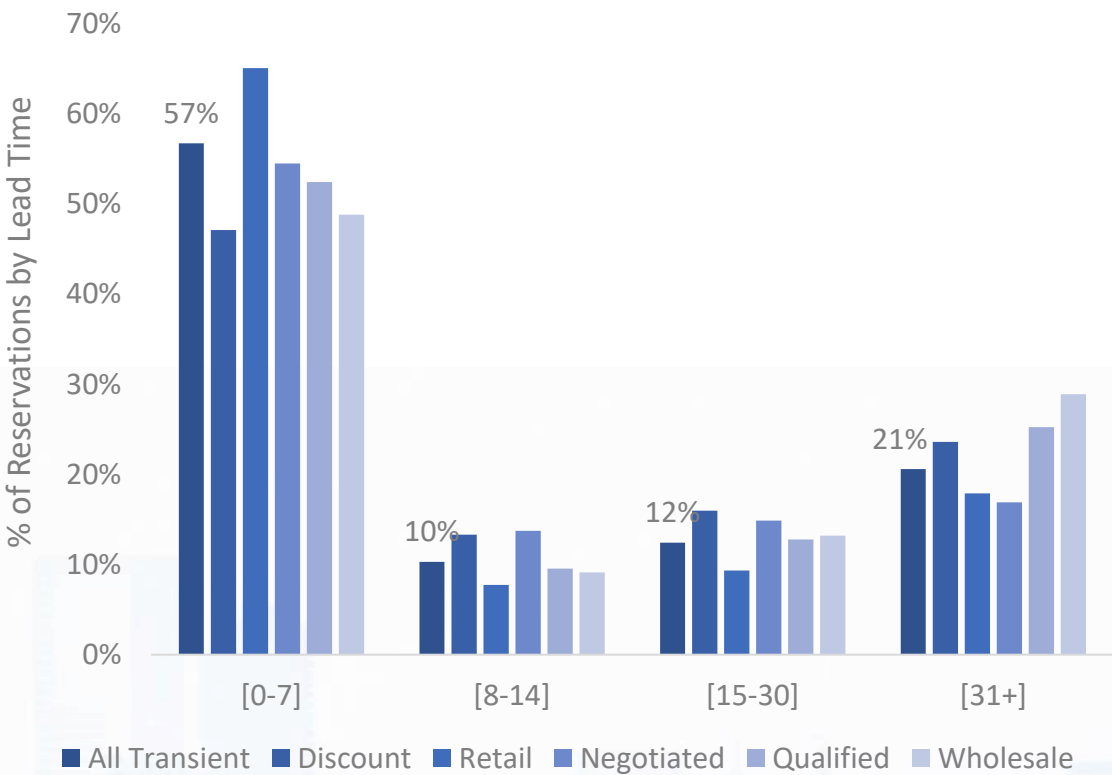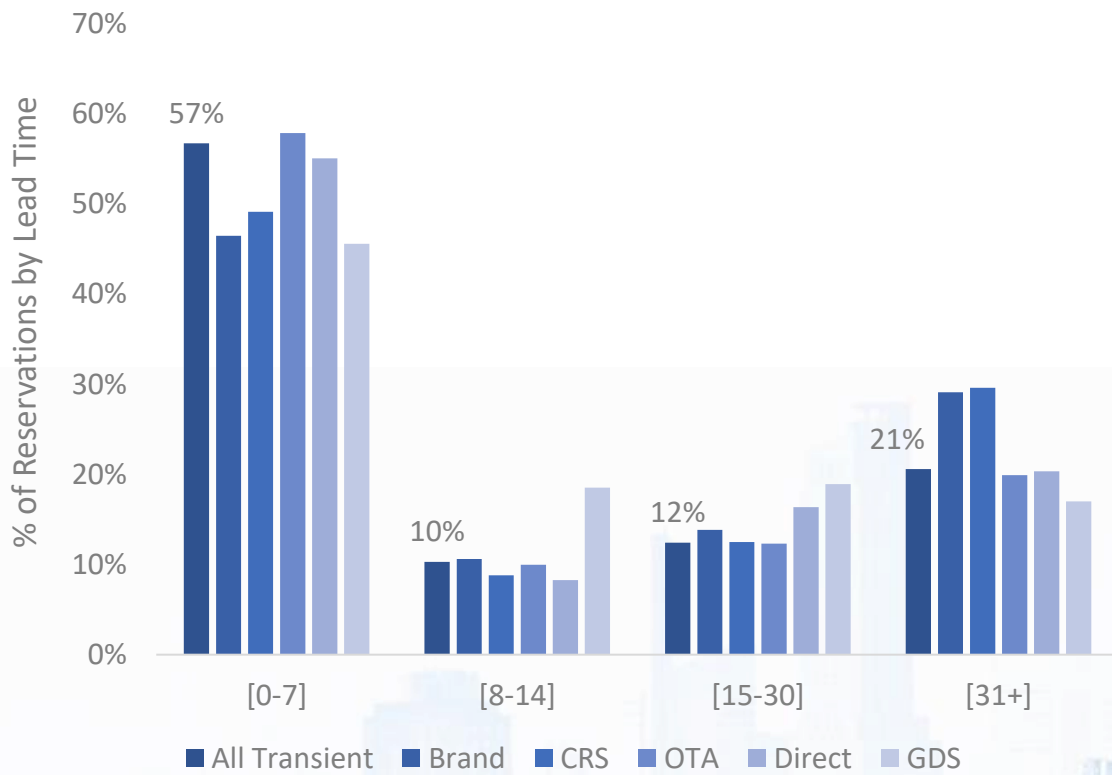
Canada

Airline & Hotel Net Reservations | Canada

Below represents the number of net reservations booked during each week for any future travel period.
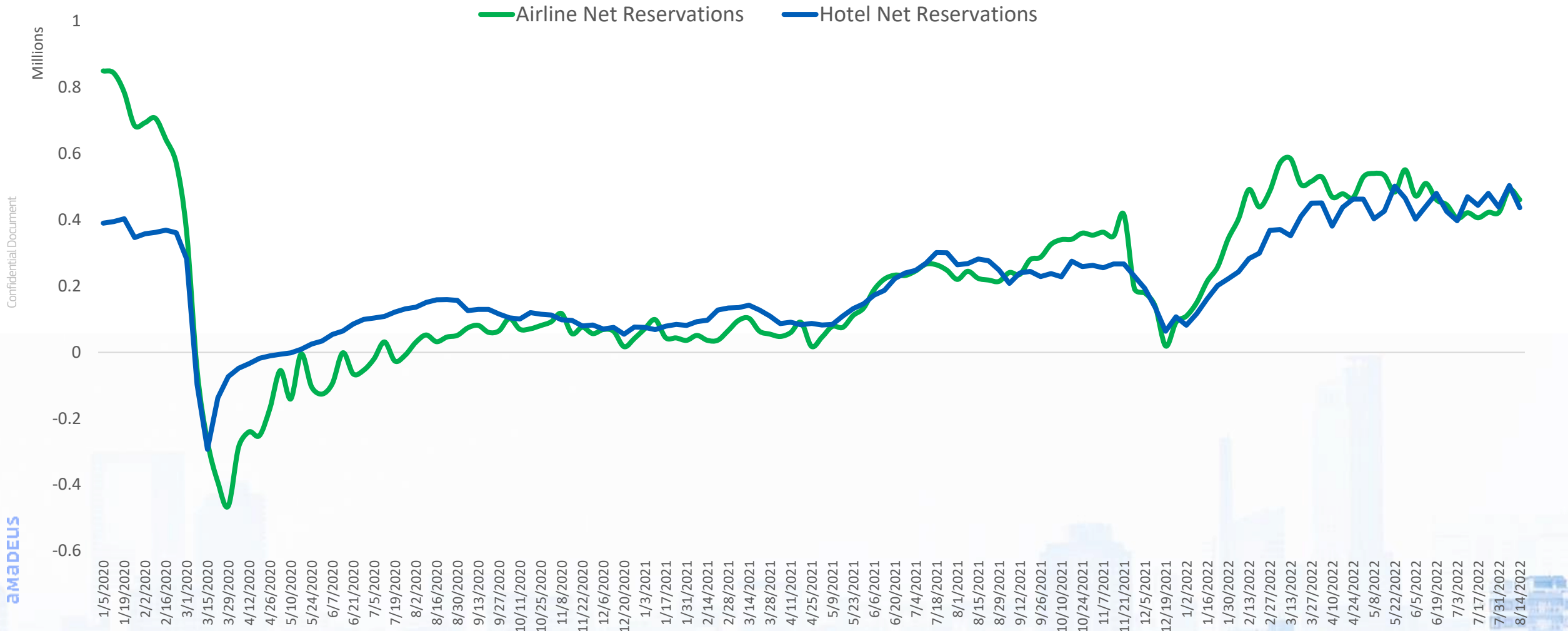
Source: Amadeus Demand360® and GDS Airline Booking Data (MIDT) data as of August 18, 2022

Monthly Occupancy & Year-on-Year Variance | Canada

On-the-books occupancy by month compared to 2021 and 2019.

Forward looking

	2022
	2021
	2019

Data labels (2022): 30%, 42%, 53%, 59%, 65%, 74%, 77%, 70%, 44%, 25%, 16%, 11%

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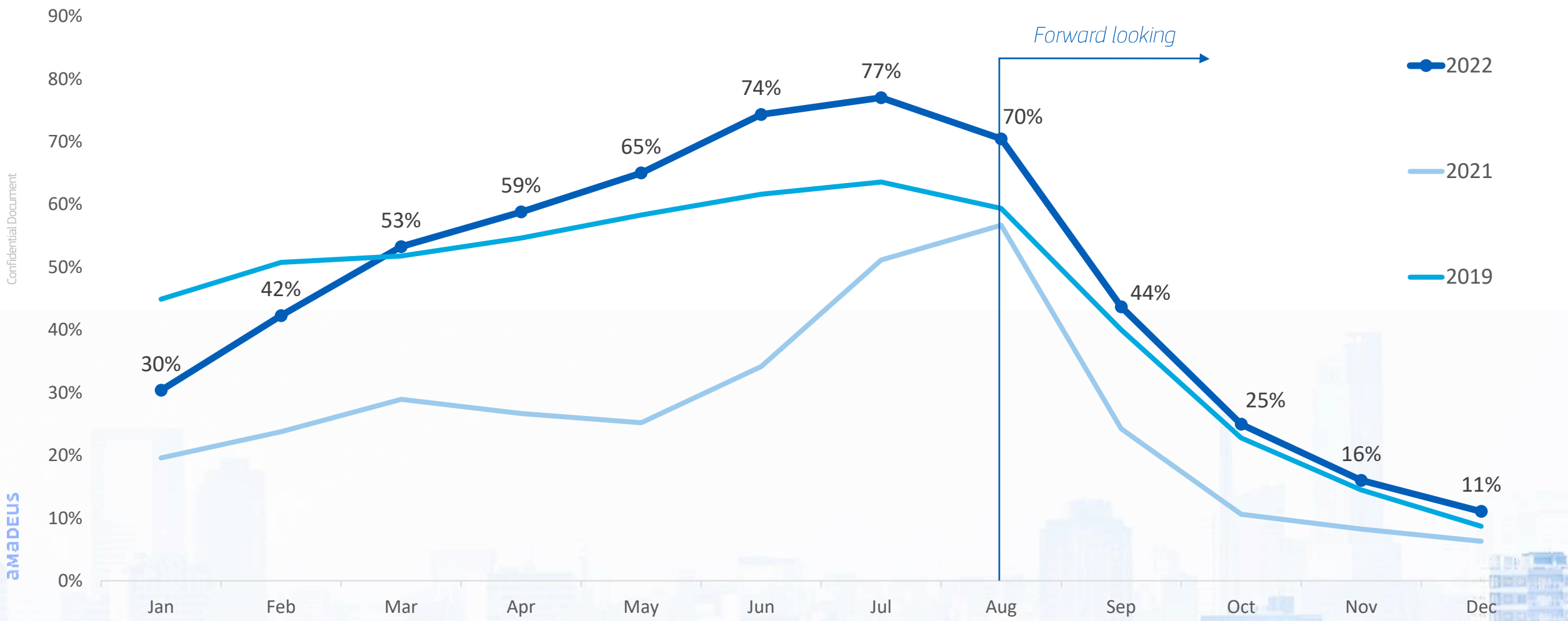
Occupancy by Province & Pace | Canada

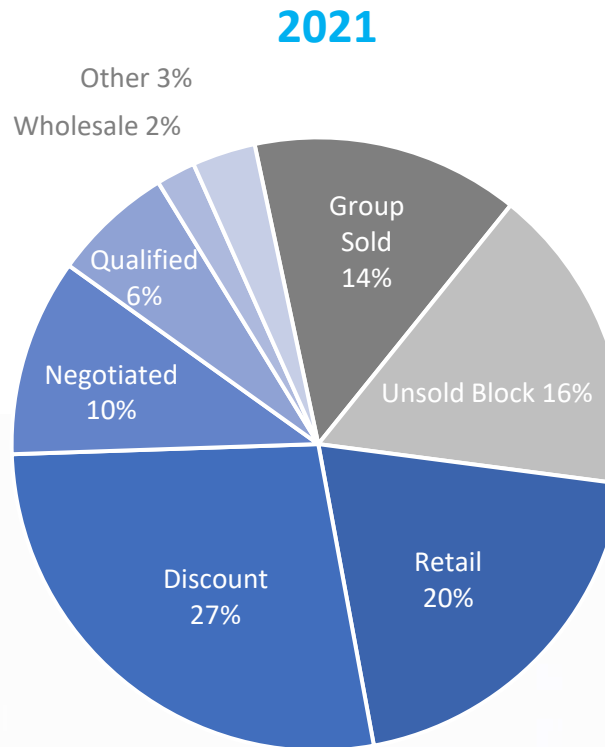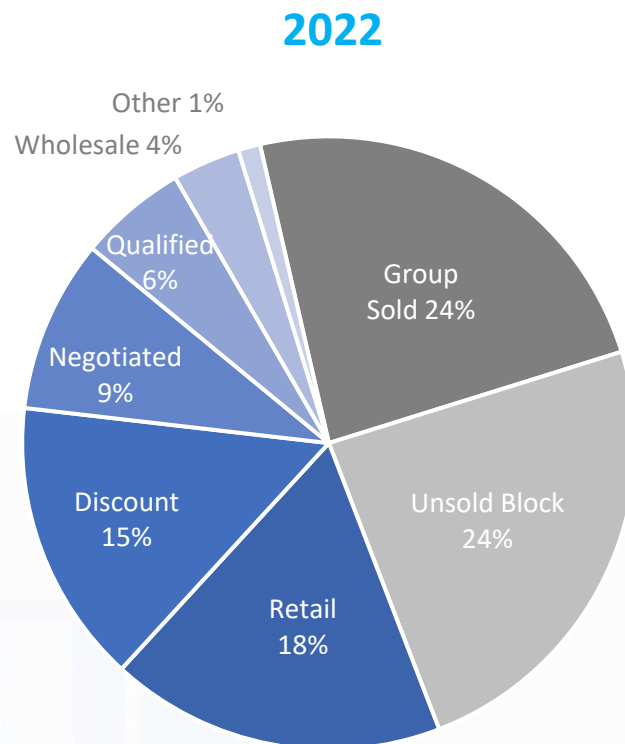On-the-books total occupancy by province for September 2022 vs same time in 2019.

■ 2022   ● 2019

Province	2022	2019
Alberta	31%	25%
British Columbia	51%	47%
Manitoba	37%	30%
New Brunswick	40%	31%
Newfoundland and Labrador	57%	50%
Nova Scotia	63%	50%
Ontario	47%	44%
Prince Edward Island	78%	76%
Quebec	46%	49%
Saskatchewan	21%	18%
Northwest Territories	34%	2%
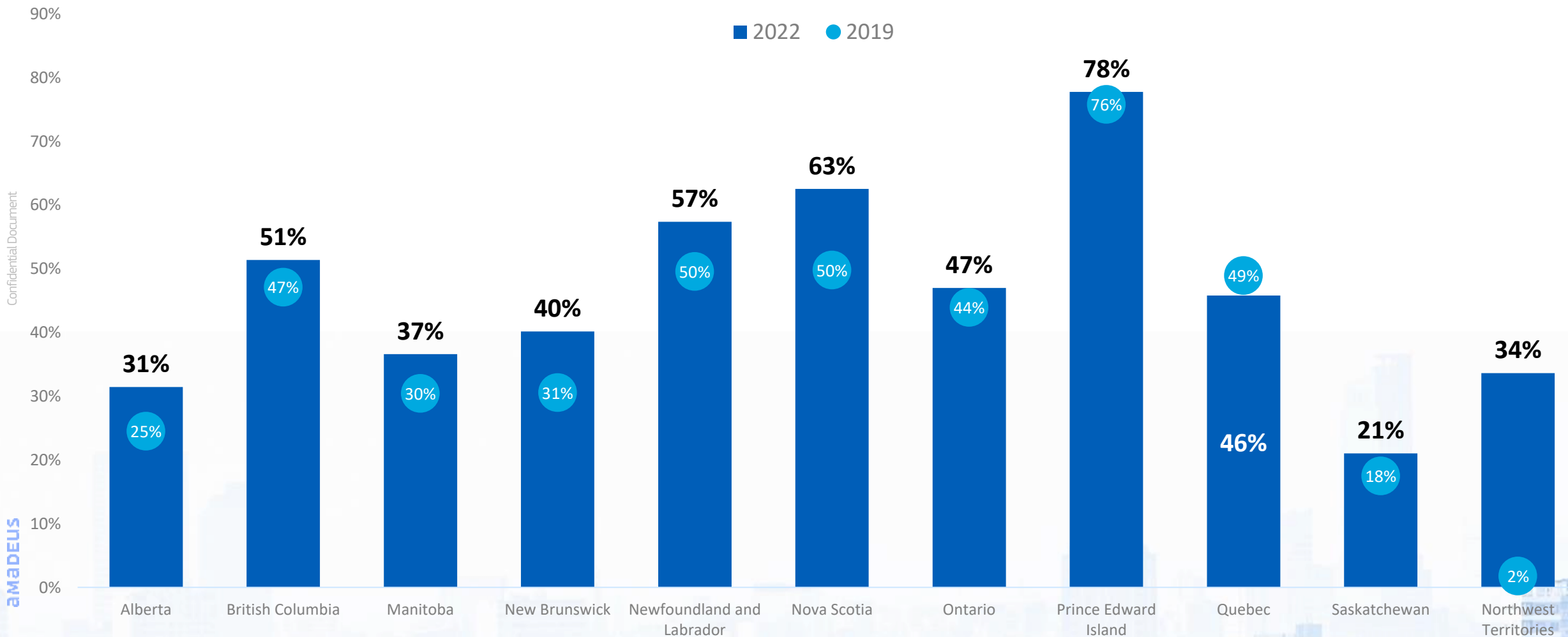
Occupancy by Market & Pace | Canada

On-the-books total occupancy by market for September 2022 vs same time in 2019.

Legend: ■ 2022 ● 2019

Market	2022	2019
Calgary	42%	33%
Edmonton	24%	19%
Halifax/Enfield	66%	52%
Montreal	44%	48%
Niagara Falls	43%	49%
Ottawa	46%	42%
Quebec City	57%	59%
Toronto	52%	50%
Vancouver	60%	63%
Winnipeg	38%	34%
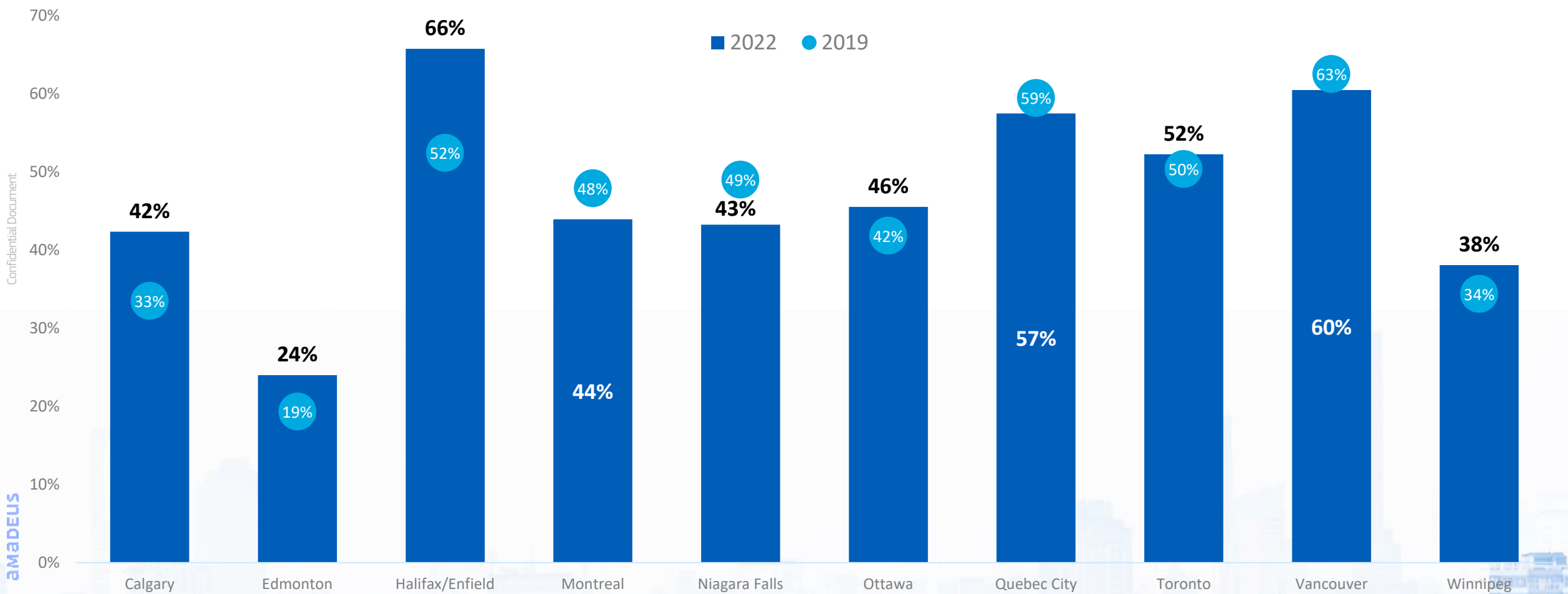
Year-on-Year Segmentation | Canada

On-the-books market segmentation mix for September 2022 vs same time September 2021 and 2019.

2022

- Other 1%
- Wholesale 4%
- Qualified 6%
- Negotiated 9%
- Discount 15%
- Retail 18%
- Unsold Block 24%
- Group Sold 24%

2021

- Other 3%
- Wholesale 2%
- Qualified 6%
- Negotiated 10%
- Discount 27%
- Retail 20%
- Unsold Block 16%
- Group Sold 14%

2019

- Other 3%
- Wholesale 4%
- Qualified 6%
- Negotiated 12%
- Discount 12%
- Retail 14%
- Unsold Block 18%
- Group Sold 30%

Source: Amadeus Demand360® data as of August 18, 2022
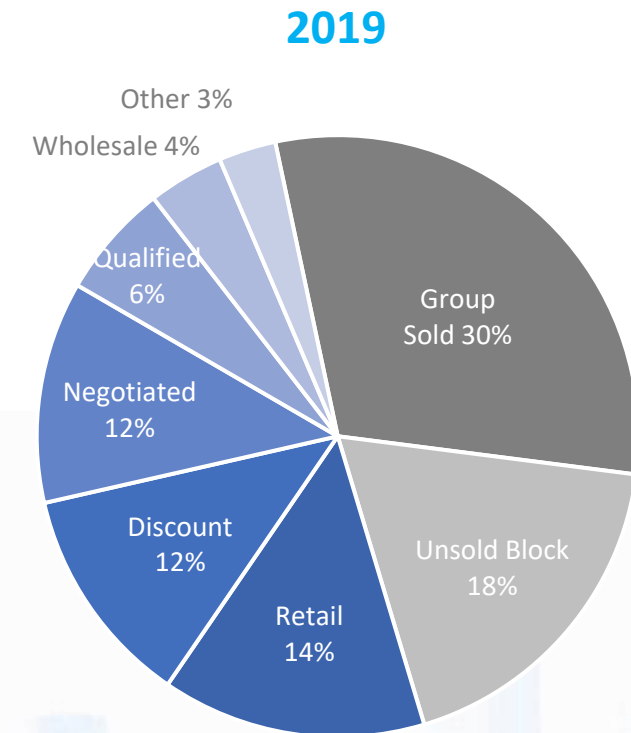
Year-on-Year Channel Mix | Canada

On-the-books distribution channel mix for September 2022 vs same time September 2021 and 2019.

2022

Brand
26%

CRS 6%

OTA
17%

GDS 6%

Direct
45%

2021

Brand
25%

CRS 6%

OTA
21%

GDS 3%

Direct
44%

2019

Brand
24%

CRS 9%

OTA 13%

GDS 8%

Direct
46%

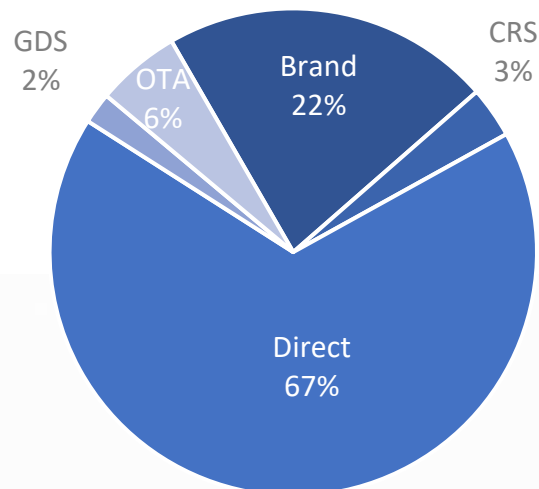Source: Amadeus Demand360® data as of August 18, 2022
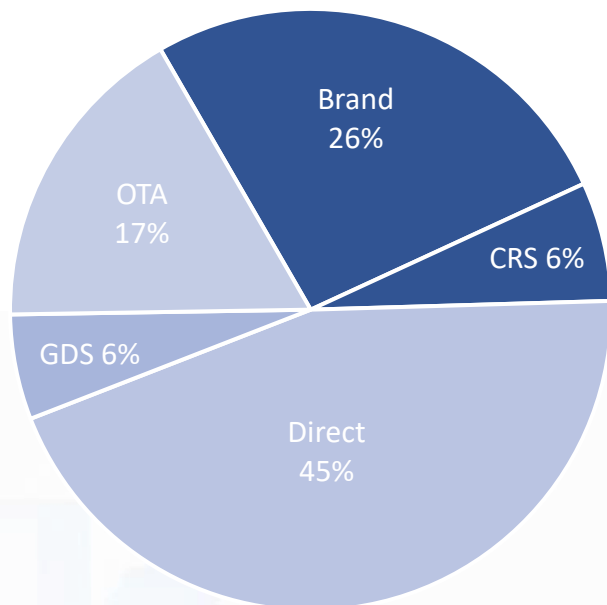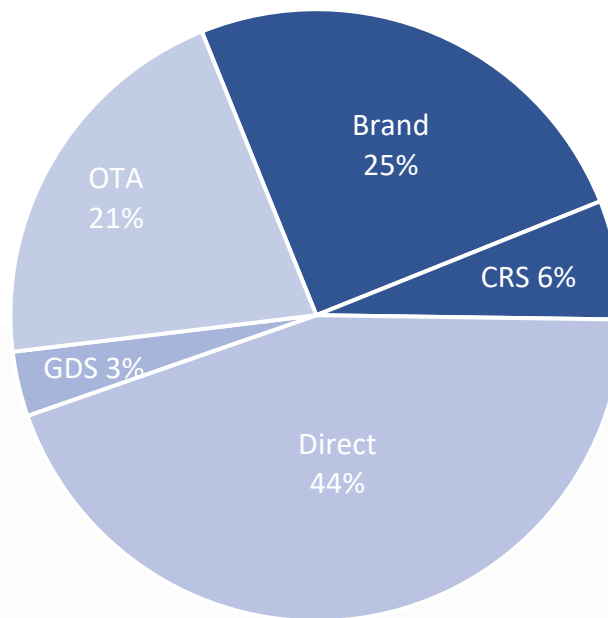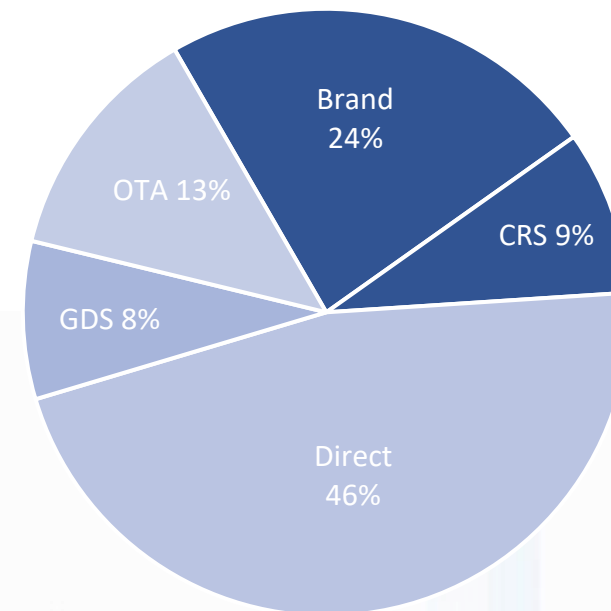
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Transient Lead Time by Segment & Channel | Canada

Percentage of transient reservations booked by lead time based on the previous 5 weeks of booking activity.

Lead Time by Segment

■ All Transient ■ Discount ■ Retail ■ Negotiated ■ Qualified ■ Wholesale

Lead Time by Channel

■ All Transient ■ Brand ■ CRS ■ OTA ■ Direct ■ GDS

Source: Amadeus Demand360® data as of August 18, 2022

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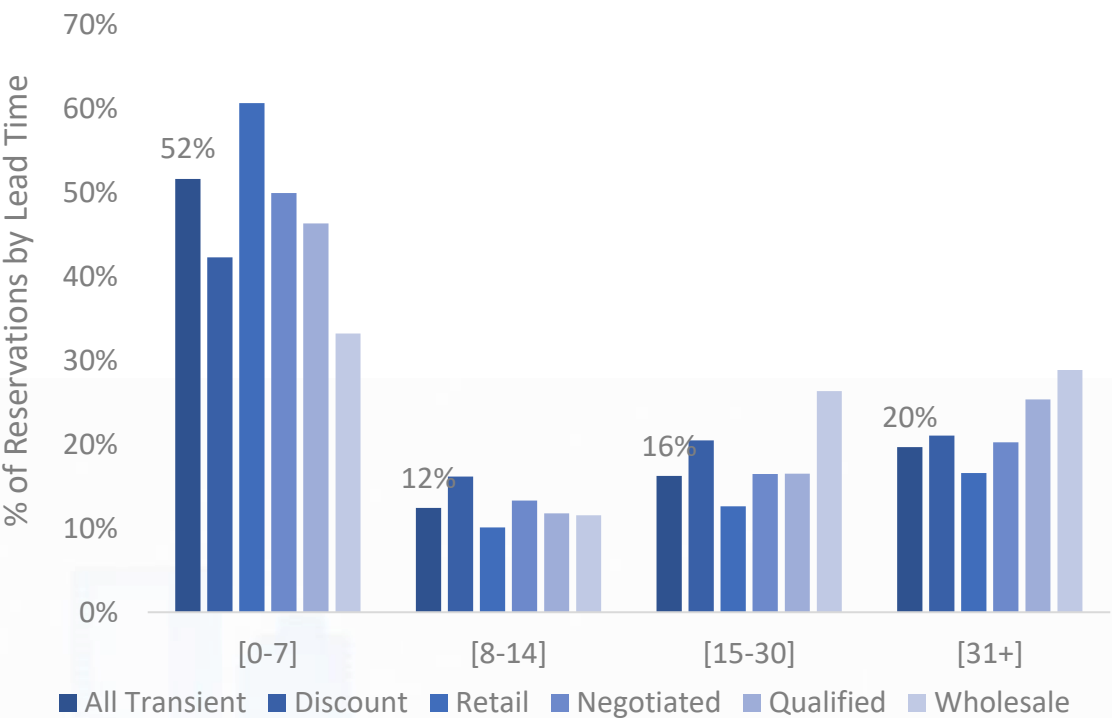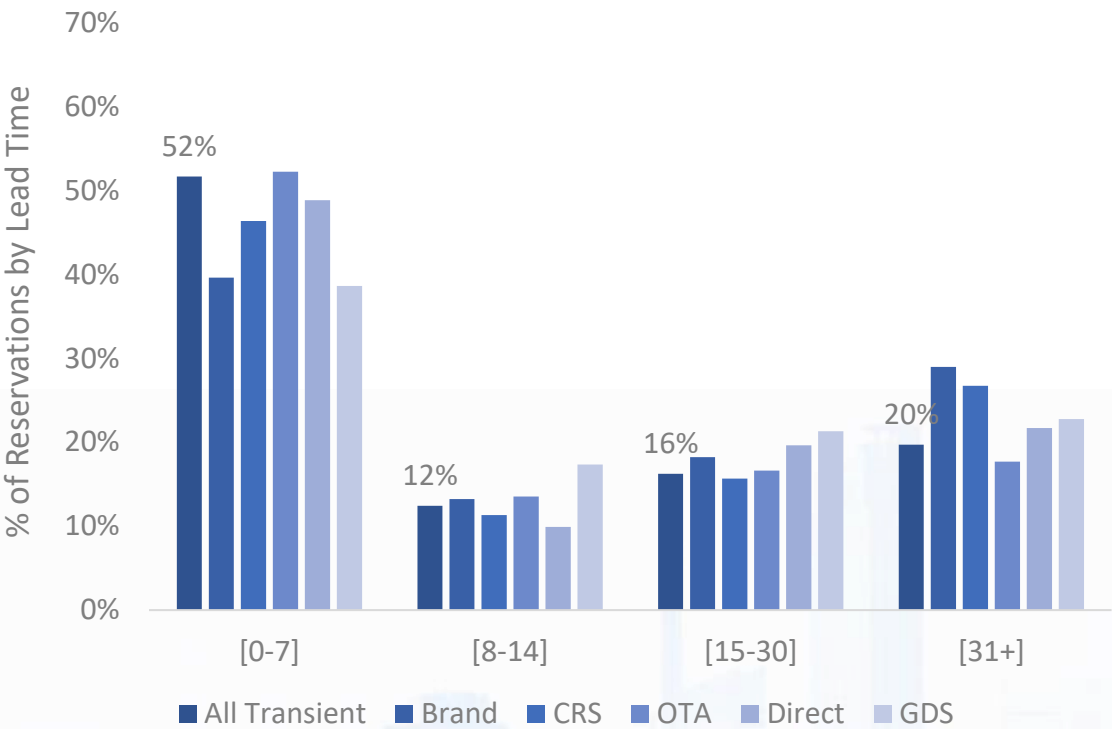
Greater China

Monthly Occupancy & Year-on-Year Variance | Greater China

On-the-books occupancy by month compared to 2021 and 2019.

Forward looking

Legend: 2022, 2021, 2019

2022 data points: Jan 37%, Feb 40%, Mar 34%, Apr 33%, May 37%, Jun 44%, Jul 56%, Aug 45%, Sep 9%, Oct 4%, Nov 3%, Dec 2%
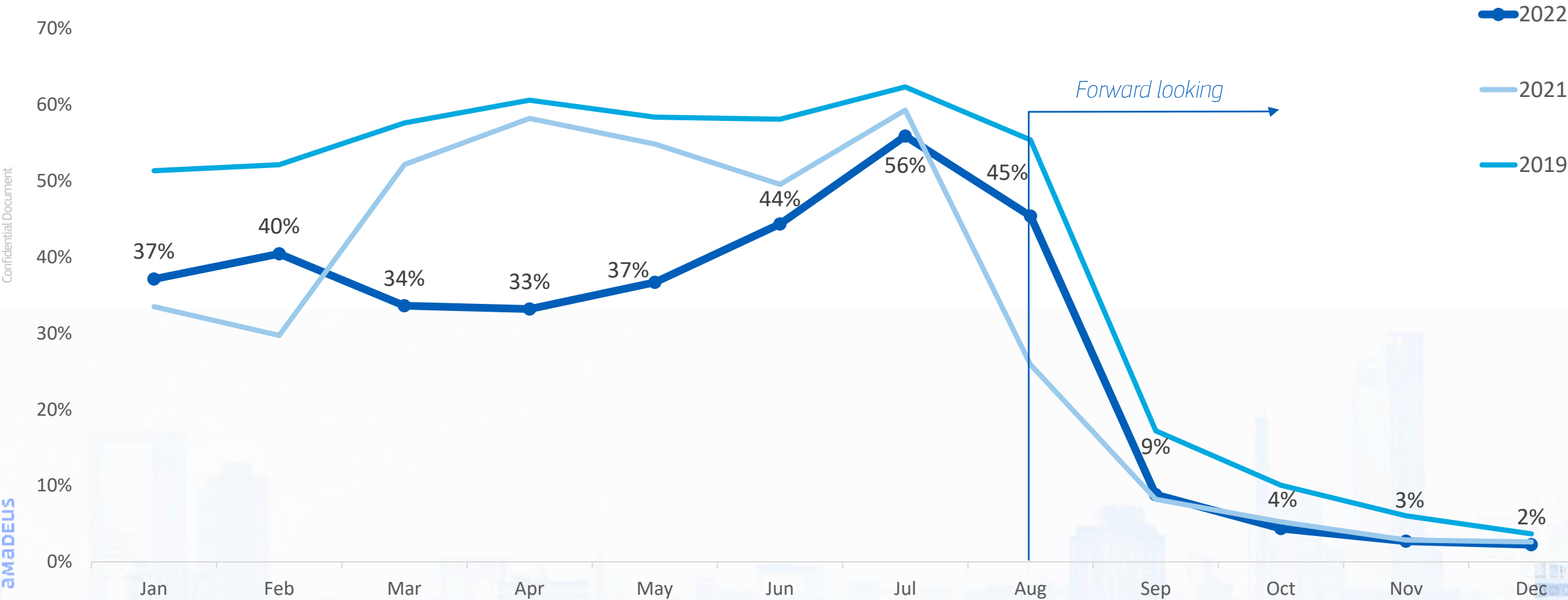
Occupancy by Market & Pace | Greater China

On-the-books total occupancy by market for September 2022 vs same time in 2019.

Legend: ■ 2022 ● 2019

Market	2022	2019
Beijing	5%	25%
Chengdu	10%	16%
Guangzhou	7%	14%
Hainan Island	9%	17%
Hangzhou	11%	17%
Nanjing	7%	11%
Shanghai	5%	22%
Shenzhen	5%	15%
Suzhou	3%	5%
Zhengzhou	5%	16%
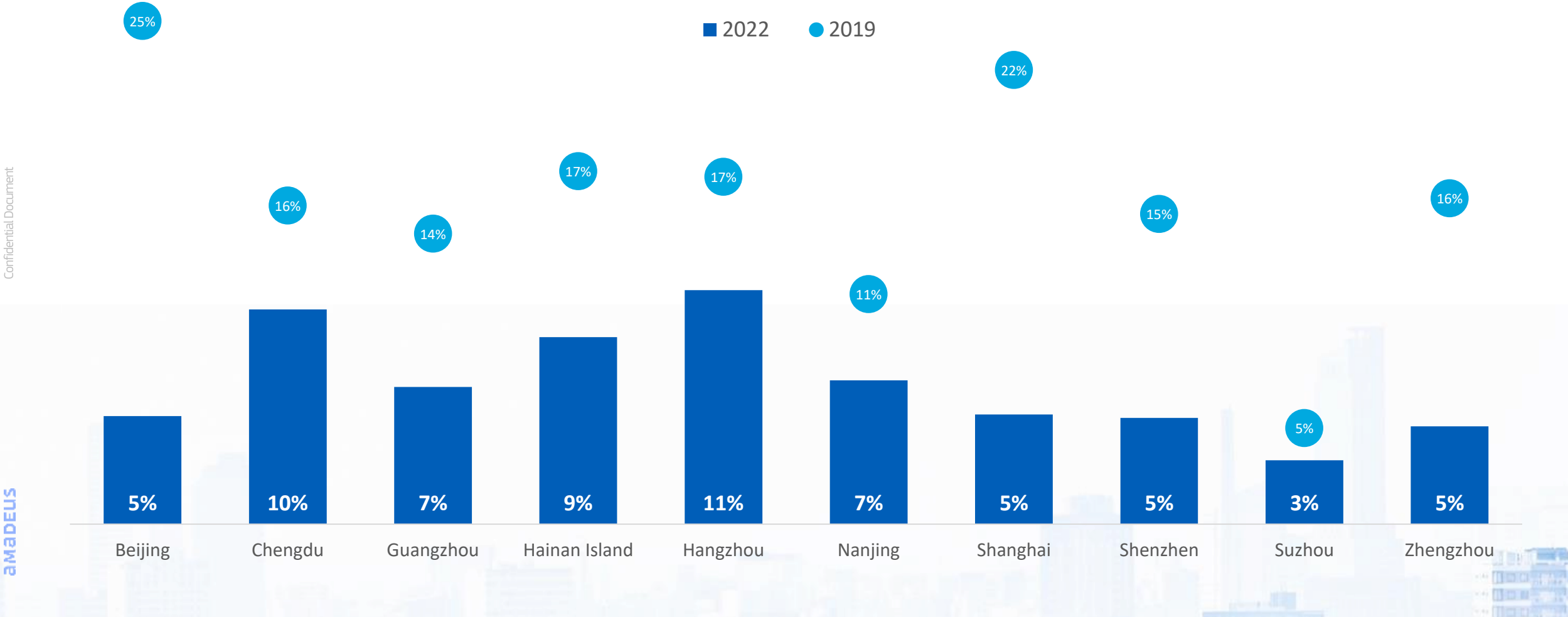
Year-on-Year Segmentation | Greater China

On-the-books market segmentation mix for September 2022 vs same time September 2021 and 2019.

2022

- Wholesale 1%
- Qualified 1%
- Other 7%
- Group Sold 9%
- Unsold Block 40%
- Retail 6%
- Discount 23%
- Negotiated 14%

2021

- Other 6%
- Wholesale 1%
- Qualified 2%
- Group Sold 6%
- Unsold Block 34%
- Retail 7%
- Discount 27%
- Negotiated 17%

2019

- Wholesale 3%
- Qualified 2%
- Other 5%
- Group Sold 7%
- Unsold Block 36%
- Retail 11%
- Discount 16%
- Negotiated 21%
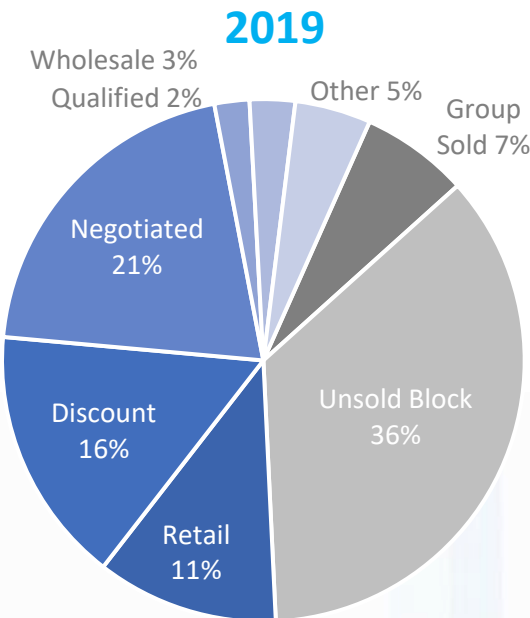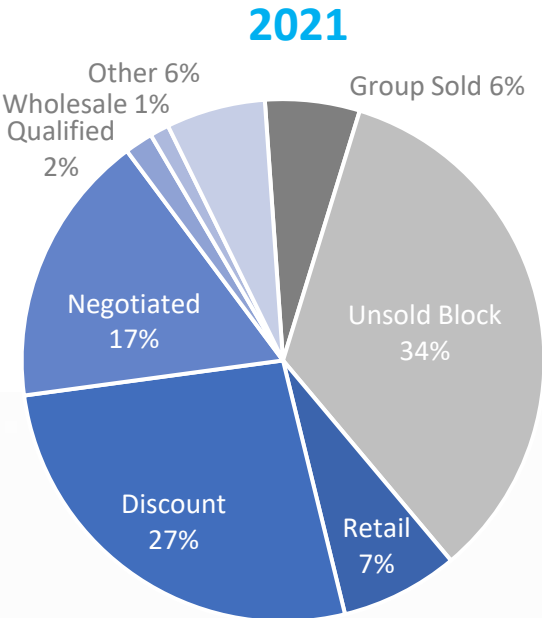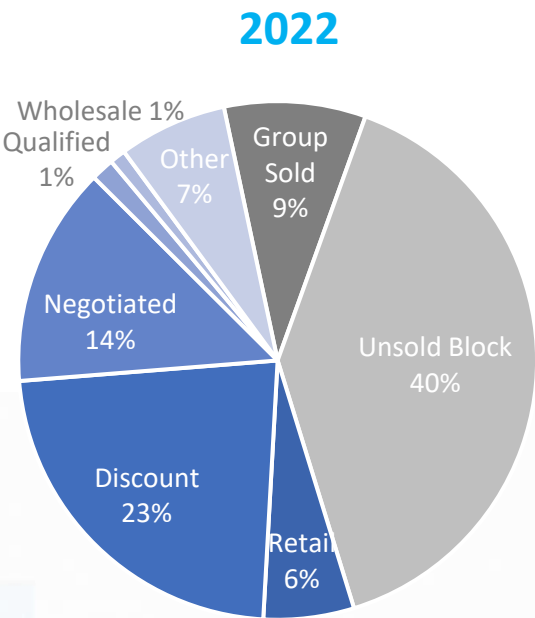
Year-on-Year Channel Mix | Greater China

On-the-books distribution channel mix for September 2022 vs same time September 2021 and 2019.

2022

- GDS 3%
- OTA 7%
- Brand 22%
- CRS 3%
- Direct 65%

2021

- GDS 2%
- OTA 6%
- Brand 22%
- CRS 3%
- Direct 67%

2019

- OTA 17%
- GDS 9%
- Brand 19%
- CRS 3%
- Direct 51%

Source: Amadeus Demand360® data as of August 18, 2022
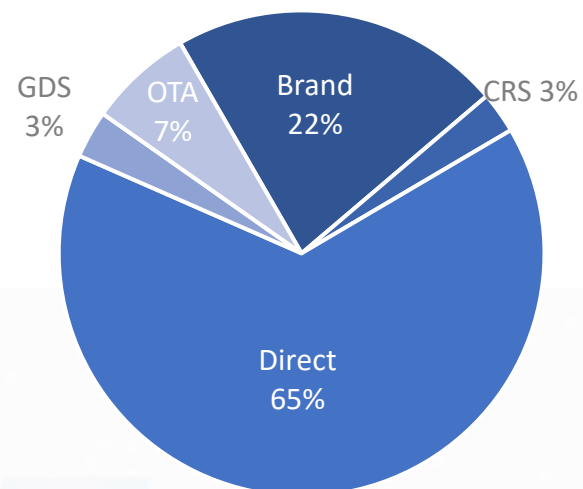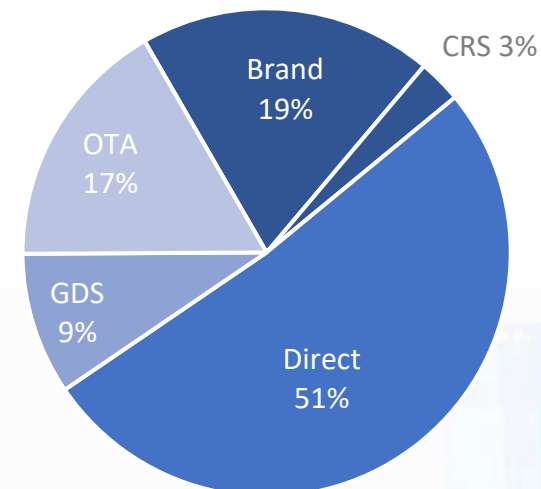
Transient Lead Time by Segment & Channel | Greater China

Percentage of transient reservations booked by lead time based on the previous 5 weeks of booking activity.

Lead Time by Segment

% of Reservations by Lead Time

- All Transient
- Discount
- Retail
- Negotiated
- Qualified
- Wholesale

Lead Time by Channel

% of Reservations by Lead Time

- All Transient
- Brand
- CRS
- OTA
- Direct
- GDS
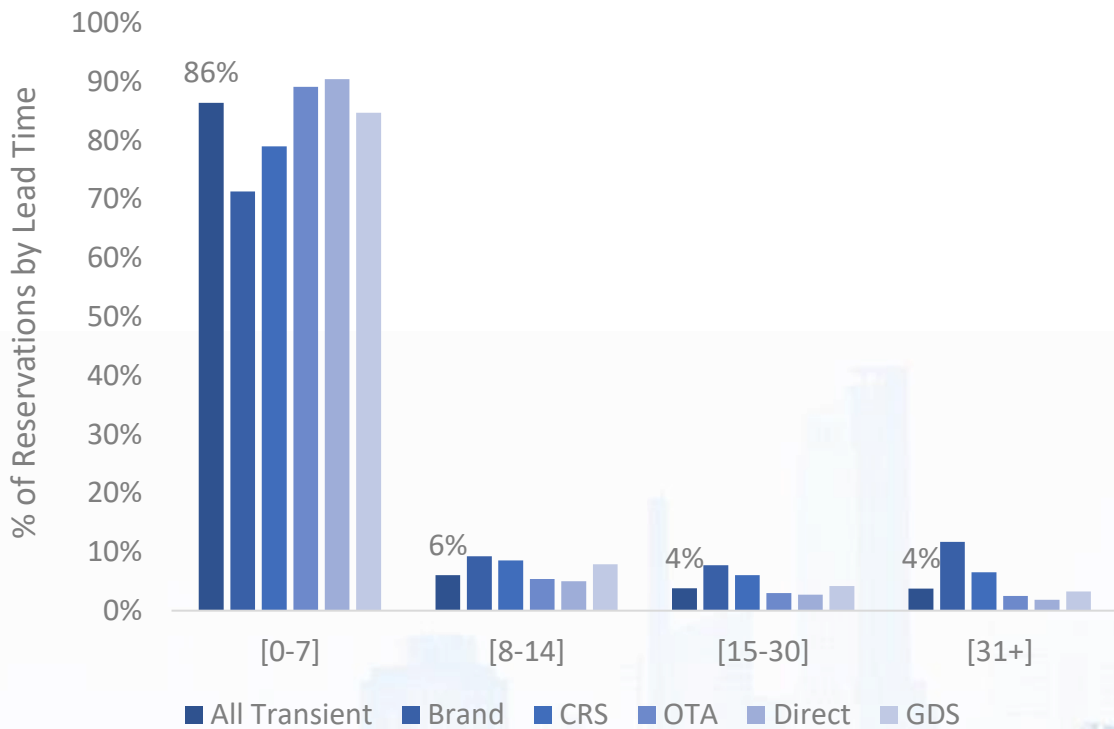
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Rest of Asia Pacific

Airline & Hotel Net Reservations | Rest of Asia Pacific

Below represents the number of net reservations booked during each week for any future travel period.
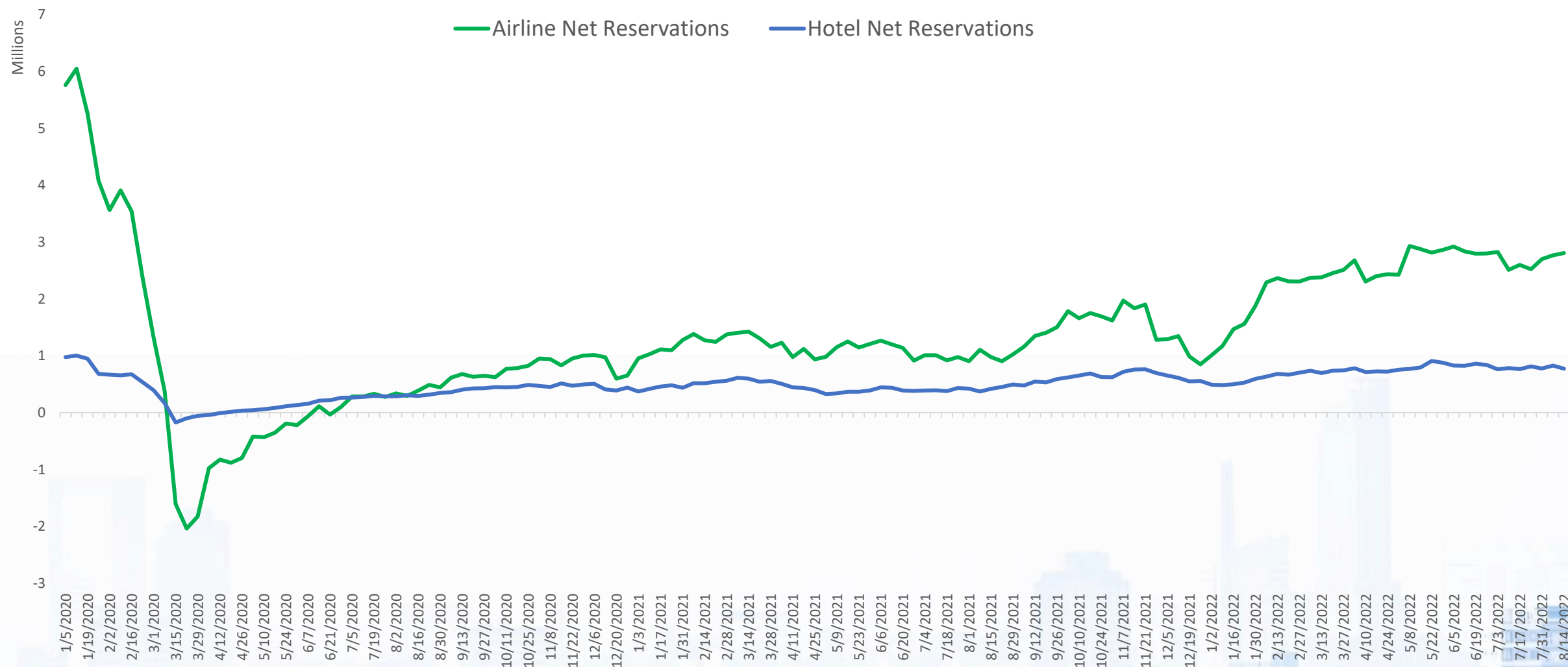
Source: Amadeus Demand360® and GDS Airline Booking Data (MIDT) data as of August 18, 2022

Monthly Occupancy & Year-on-Year Variance | Rest of Asia Pacific
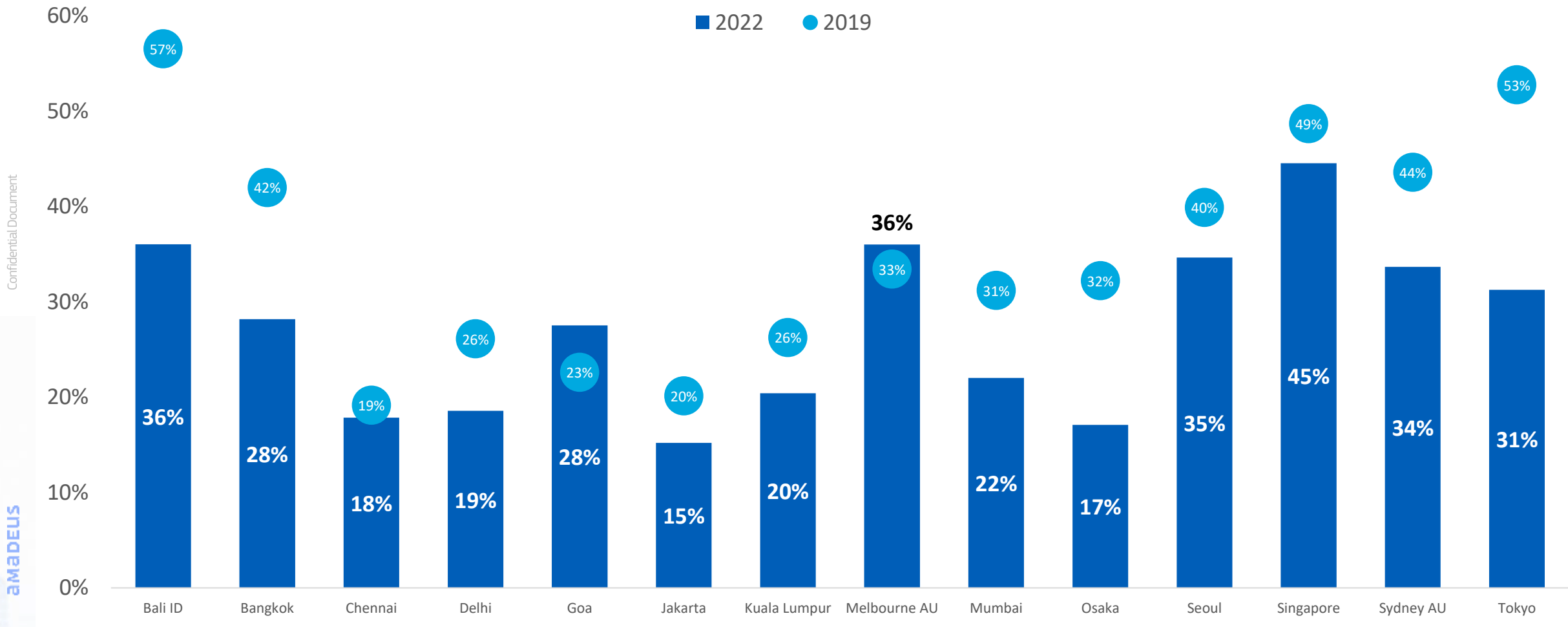
On-the-books occupancy by month compared to 2021 and 2019.
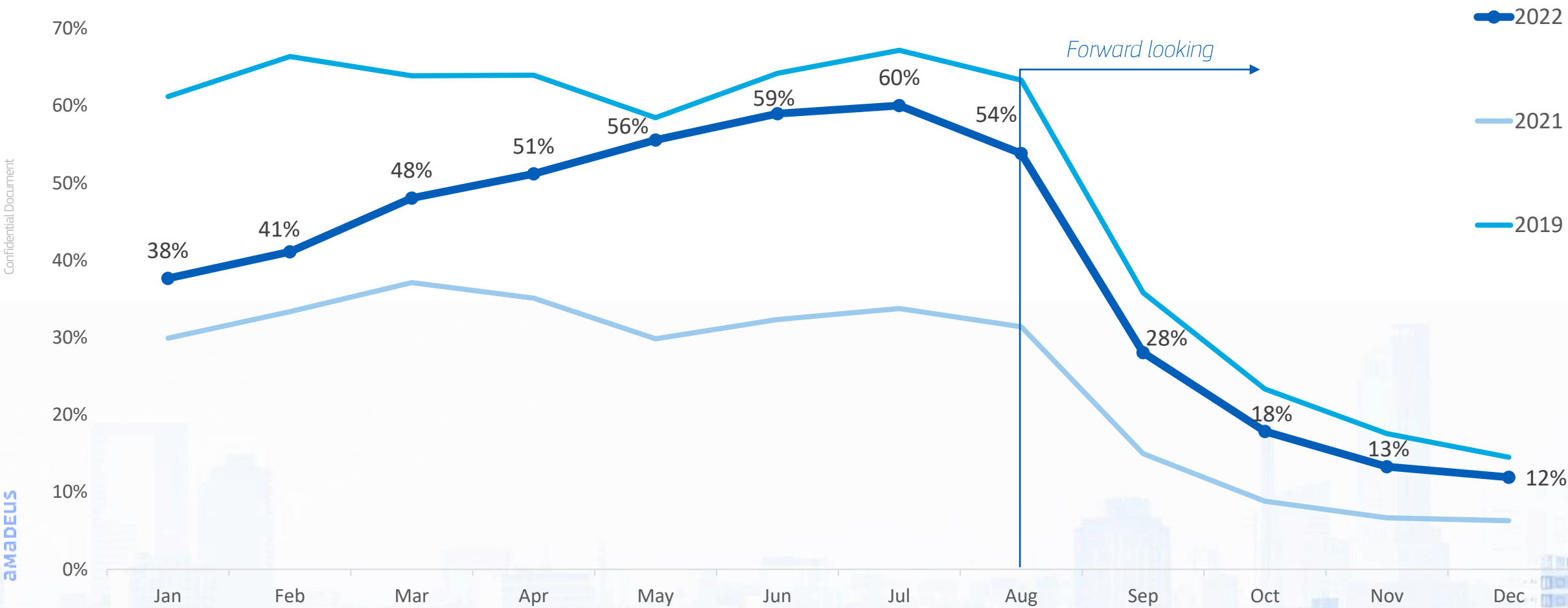
Forward looking

Legend:
- 2022
- 2021
- 2019

Data labels (2022): Jan 38%, Feb 41%, Mar 48%, Apr 51%, May 56%, Jun 59%, Jul 60%, Aug 54%, Sep 28%, Oct 18%, Nov 13%, Dec 12%

Occupancy by Market & Pace | Rest of Asia Pacific

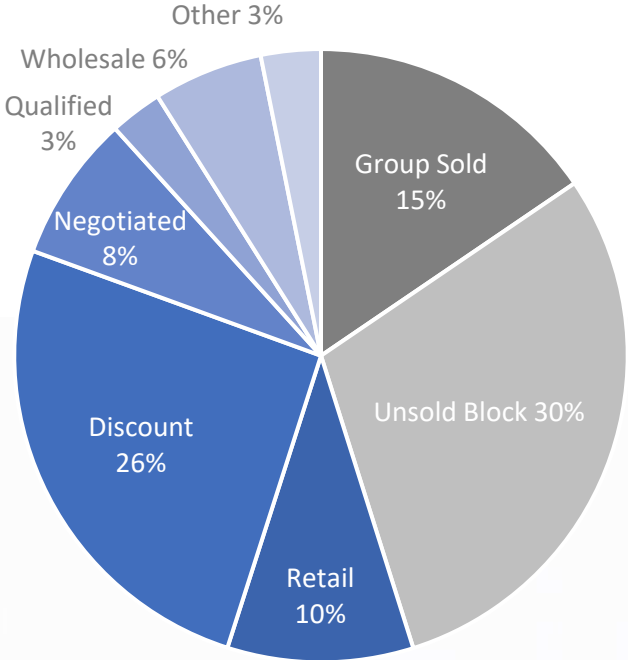On-the-books total occupancy by market for September 2022 vs same time in 2019.

Legend: ■ 2022 ● 2019

Market	2022	2019
Bali ID	36%	57%
Bangkok	28%	42%
Chennai	18%	19%
Delhi	19%	26%
Goa	28%	23%
Jakarta	15%	20%
Kuala Lumpur	20%	26%
Melbourne AU	36%	33%
Mumbai	22%	31%
Osaka	17%	32%
Seoul	35%	40%
Singapore	45%	49%
Sydney AU	34%	44%
Tokyo	31%	53%

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Year-on-Year Segmentation | Rest of Asia Pacific

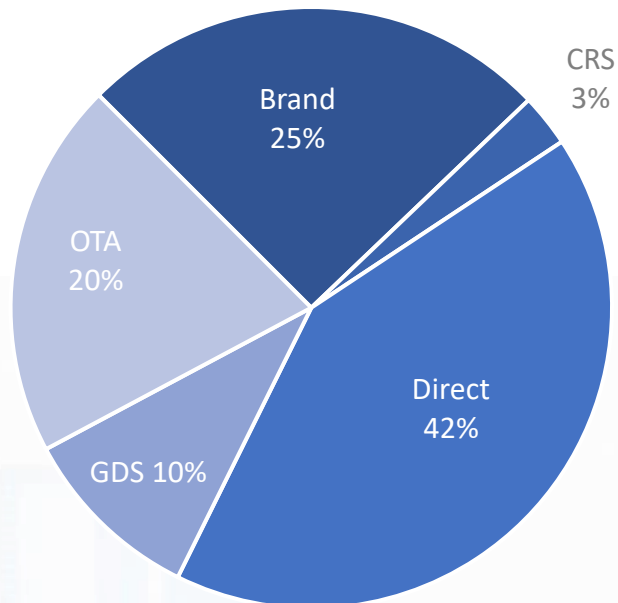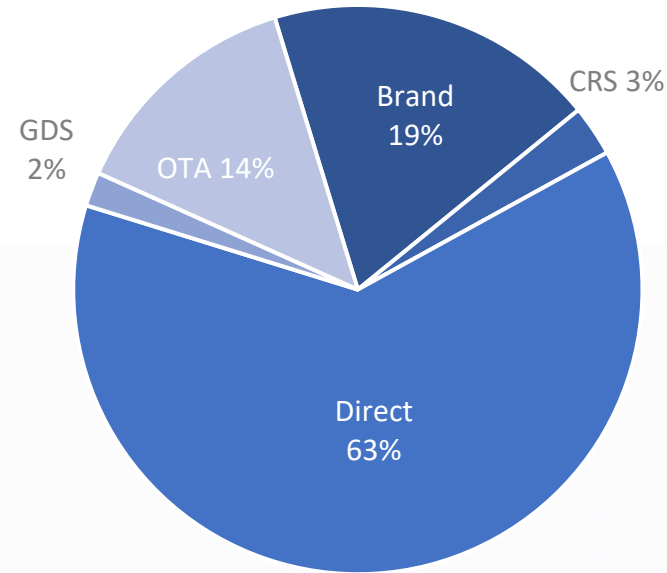On-the-books market segmentation mix for September 2022 vs same time September 2021 and 2019.

2022

- Other 2%
- Qualified 3%
- Wholesale 8%
- Group Sold 9%
- Unsold Block 22%
- Negotiated 13%
- Discount 27%
- Retail 16%

2021

- Other 3%
- Wholesale 6%
- Qualified 3%
- Negotiated 8%
- Group Sold 15%
- Unsold Block 30%
- Discount 26%
- Retail 10%

2019

- Other 2%
- Qualified 3%
- Wholesale 11%
- Group Sold 11%
- Unsold Block 22%
- Negotiated 13%
- Discount 25%
- Retail 12%

Source: Amadeus Demand360® data as of August 18, 2022
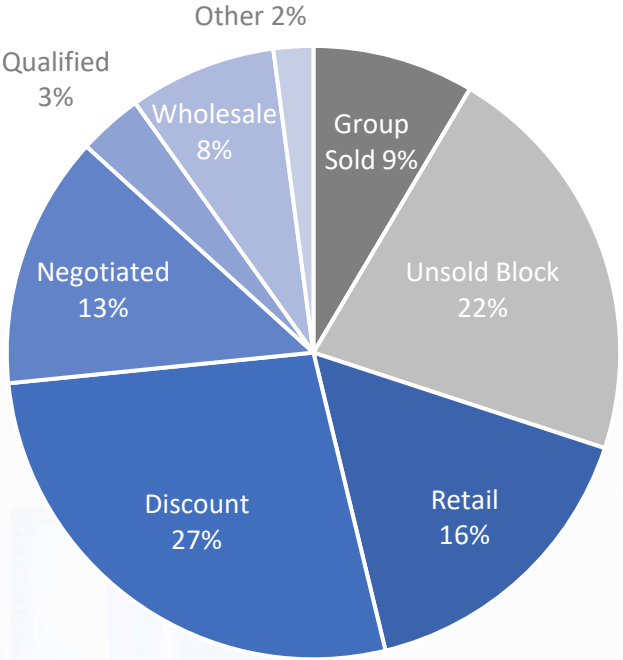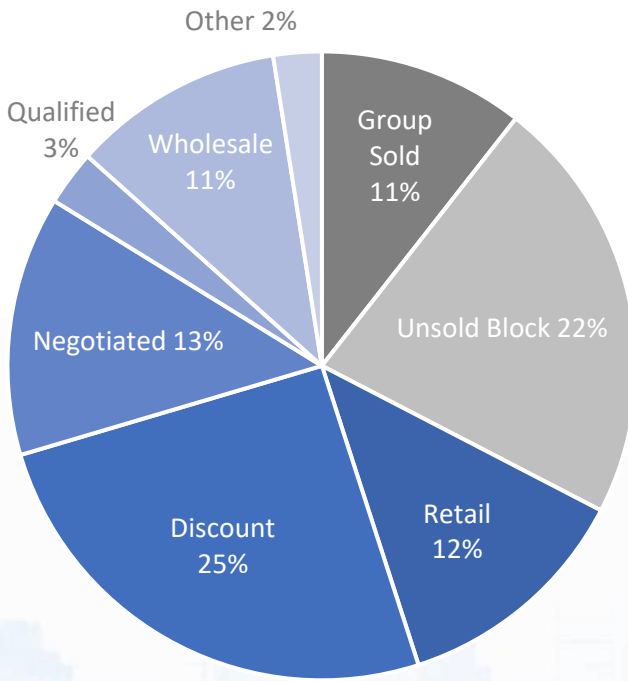
Year-on-Year Channel Mix | Rest of Asia Pacific

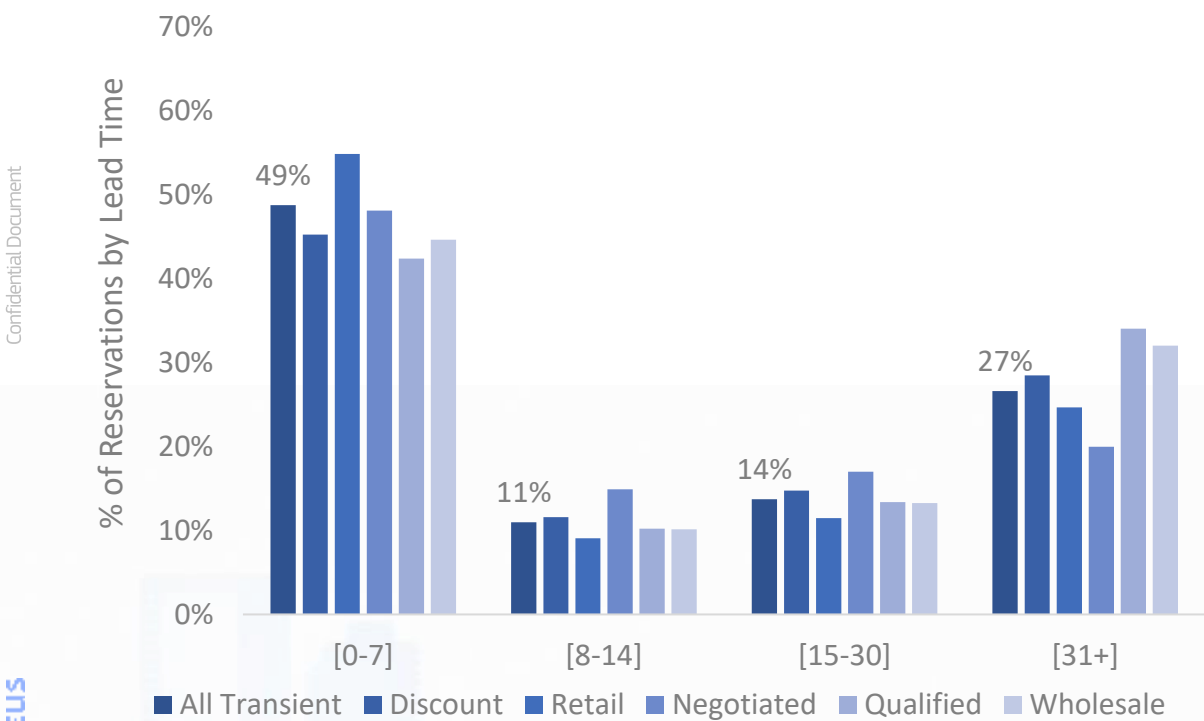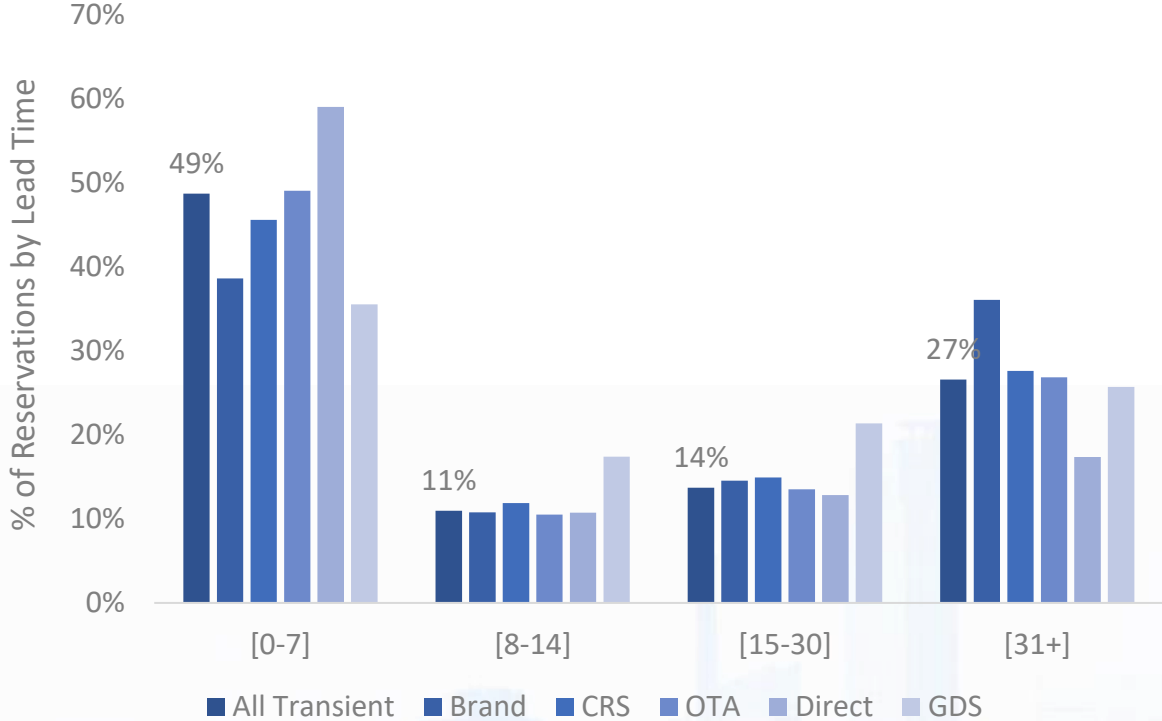On-the-books distribution channel mix for September 2022 vs same time September 2021 and 2019.

2022

- CRS 3%
- Brand 25%
- OTA 20%
- GDS 10%
- Direct 42%

2021

- GDS 2%
- OTA 14%
- Brand 19%
- CRS 3%
- Direct 63%

2019

- CRS 4%
- Brand 20%
- OTA 22%
- GDS 10%
- Direct 44%

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Transient Lead Time by Segment & Channel | Rest of Asia Pacific

Percentage of transient reservations booked by lead time based on the previous 5 weeks of booking activity.


Lead Time by Segment

Legend: All Transient, Discount, Retail, Negotiated, Qualified, Wholesale

Values labeled: [0-7] 49%, [8-14] 11%, [15-30] 14%, [31+] 27%

Lead Time by Channel

Legend: All Transient, Brand, CRS, OTA, Direct, GDS

Values labeled: [0-7] 49%, [8-14] 11%, [15-30] 14%, [31+] 27%

Source: Amadeus Demand360® data as of August 18, 2022

Europe

Airline & Hotel Net Reservations | Europe

Below represents the number of net reservations booked during each week for any future travel period.
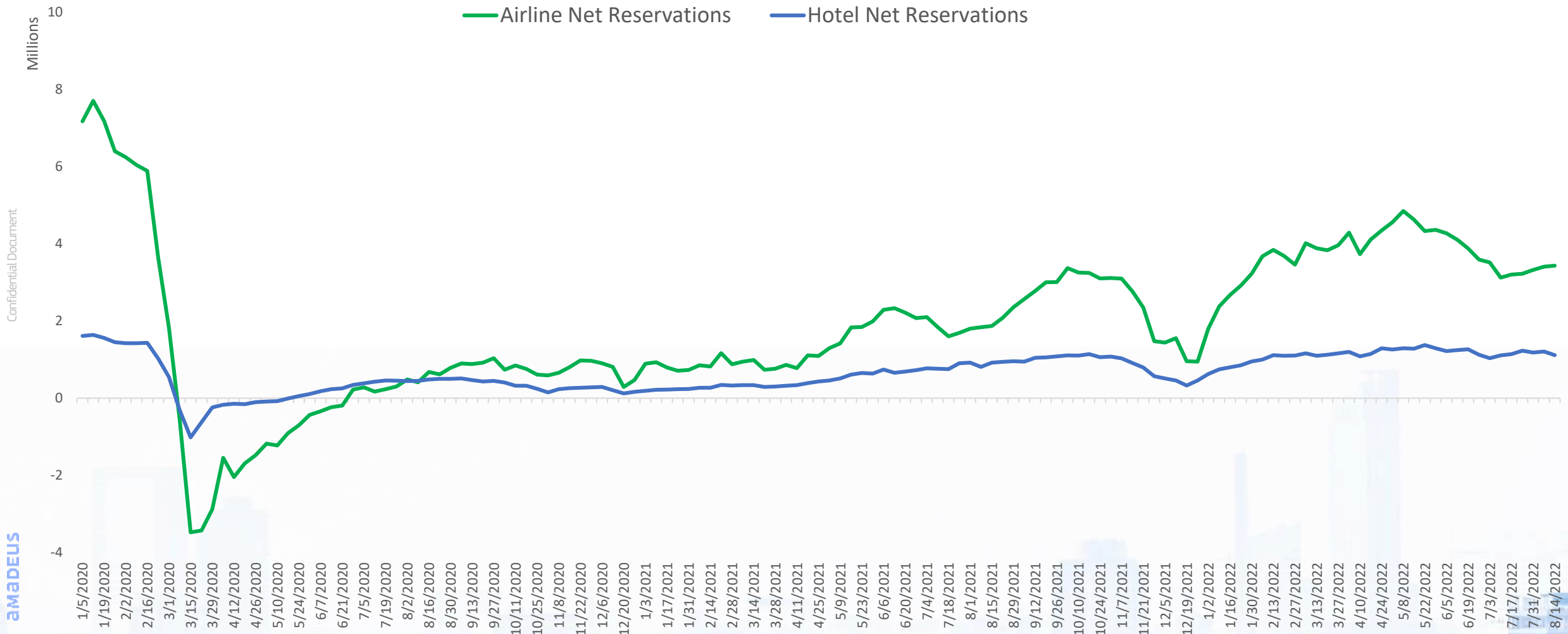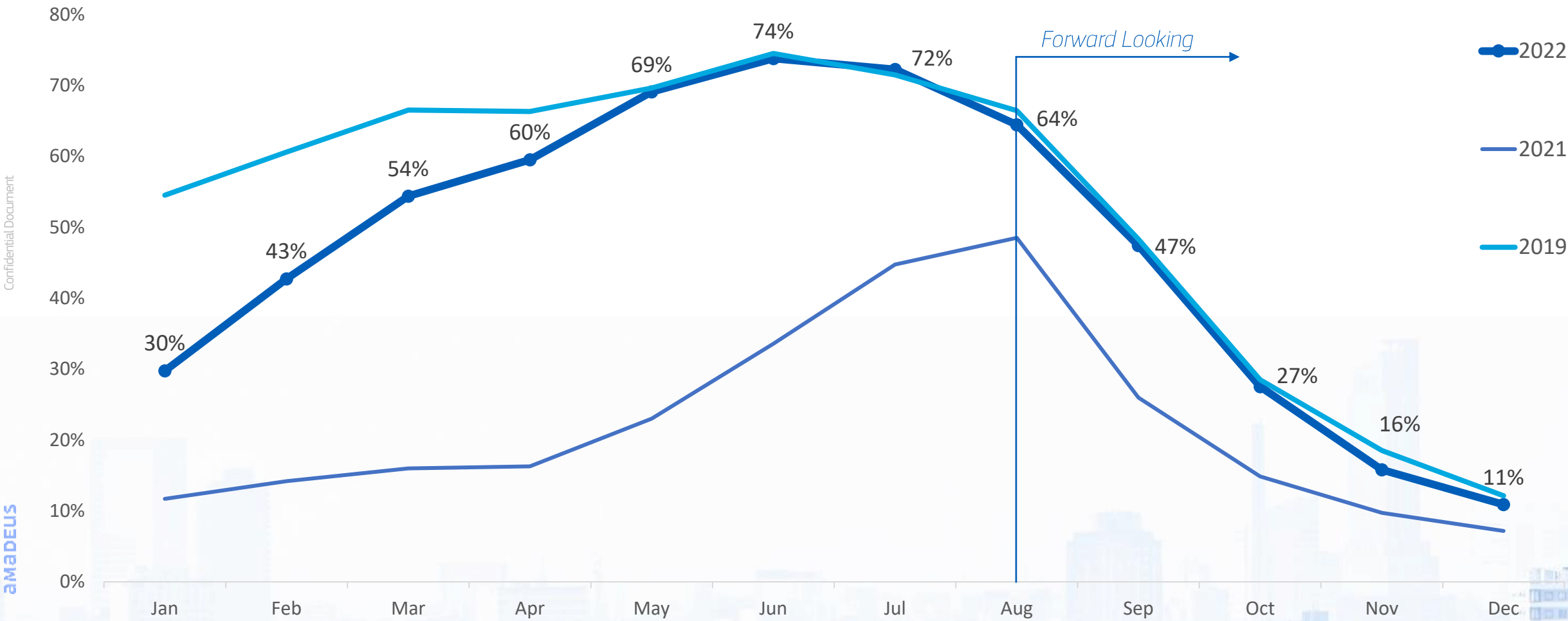
Monthly Occupancy & Year-on-Year Variance | Europe
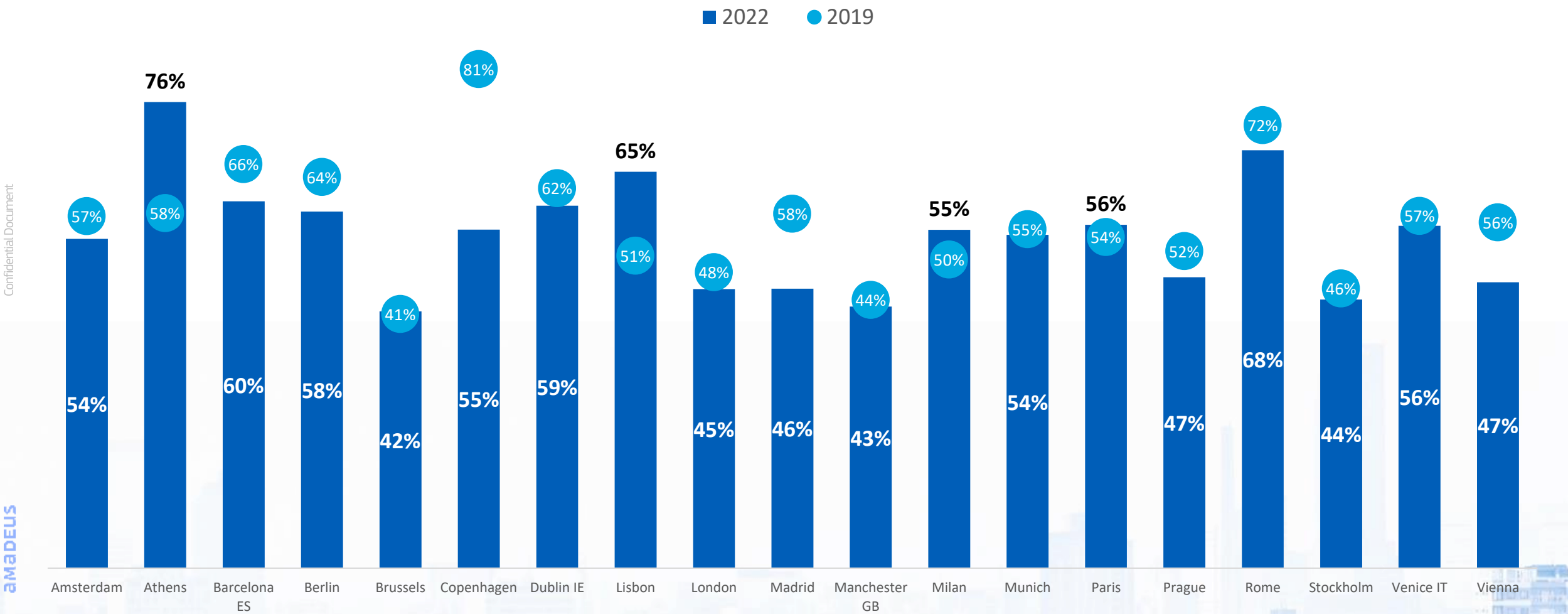
On-the-books occupancy by month compared to 2021 and 2019.

Forward Looking

2022

2021

2019

30% 43% 54% 60% 69% 74% 72% 64% 47% 27% 16% 11%

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

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Occupancy by Market & Pace | Europe

On-the-books total occupancy by market for September 2022 vs same time in 2019.

■ 2022   ● 2019

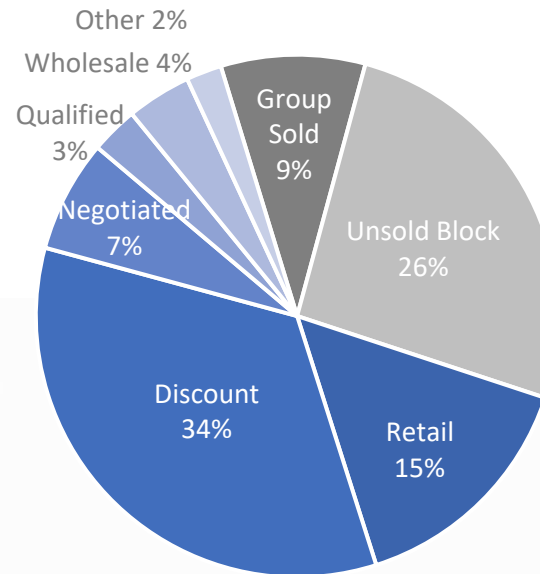| Market	2022	2019
Amsterdam	54%	57%
Athens	76%	58%
Barcelona ES	60%	66%
Berlin	58%	64%
Brussels	42%	41%
Copenhagen	55%	81%
Dublin IE	59%	62%
Lisbon	65%	51%
London	45%	48%
Madrid	46%	58%
Manchester GB	43%	44%
Milan	55%	50%
Munich	54%	55%
Paris	56%	54%
Prague	47%	52%
Rome	68%	72%
Stockholm	44%	46%
Venice IT	56%	57%
Vienna	47%	56%

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Year-on-Year Segmentation | Europe

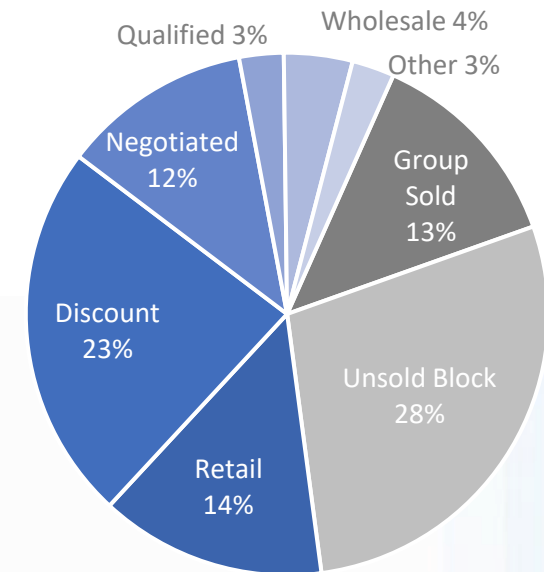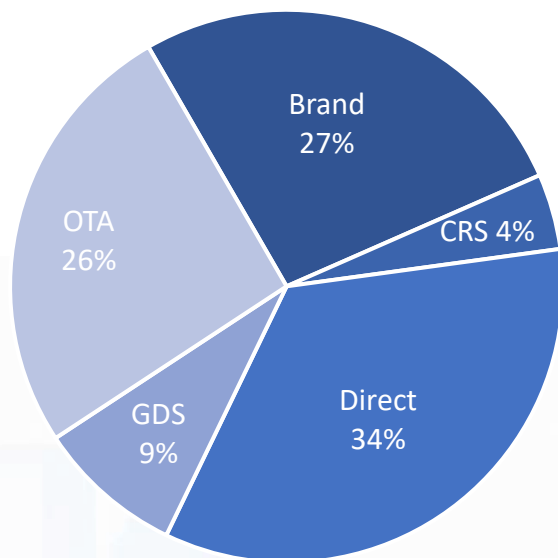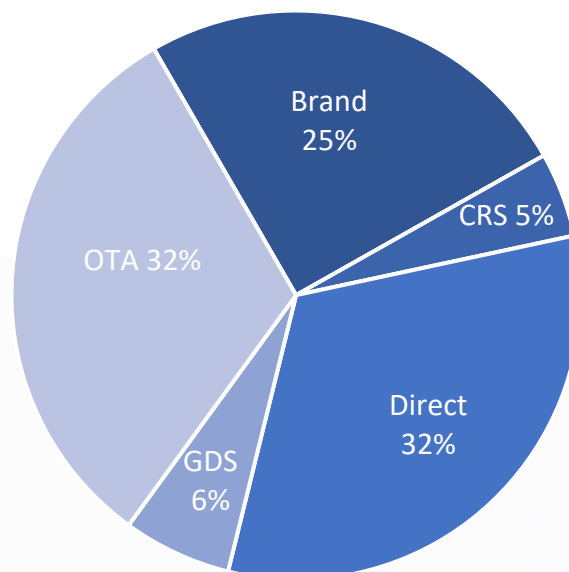On-the-books market segmentation mix for September 2022 vs same time September 2021 and 2019.

2022

- Other 2%
- Wholesale 4%
- Qualified 3%
- Group Sold 12%
- Unsold Block 31%
- Negotiated 9%
- Discount 23%
- Retail 15%

2021

- Other 2%
- Wholesale 4%
- Qualified 3%
- Group Sold 9%
- Unsold Block 26%
- Negotiated 7%
- Discount 34%
- Retail 15%

2019

- Qualified 3%
- Wholesale 4%
- Other 3%
- Negotiated 12%
- Group Sold 13%
- Discount 23%
- Unsold Block 28%
- Retail 14%

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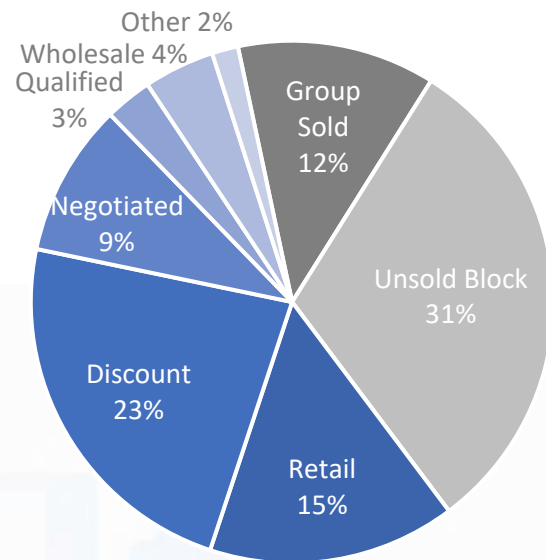
Year-on-Year Channel Mix | Europe

On-the-books distribution channel mix for September 2022 vs same time September 2021 and 2019.

2022

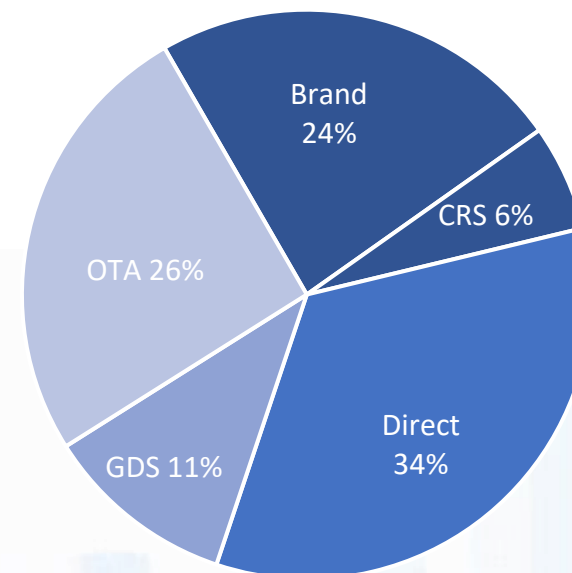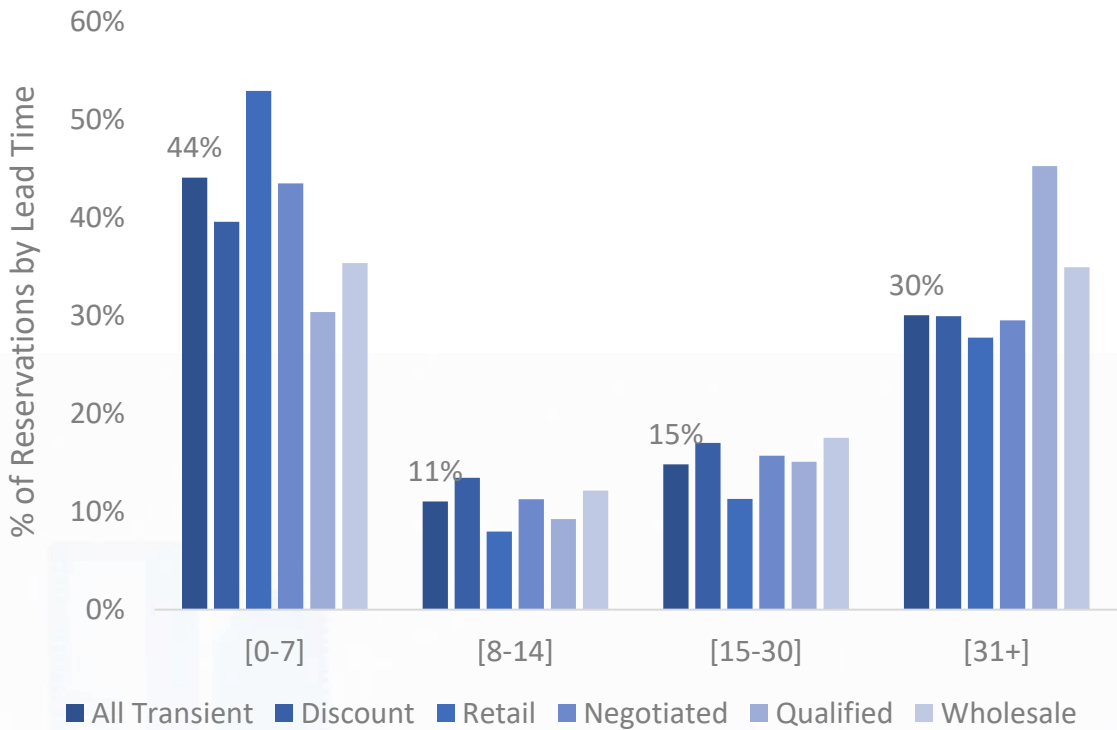**2021**

2019

Brand
27%

CRS 4%

Direct
34%

GDS
9%

OTA
26%

Brand
25%

CRS 5%

Direct
32%

GDS
6%

OTA 32%

Brand
24%

CRS 6%

Direct
34%

GDS 11%

OTA 26%

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Source: Amadeus Demand360® data as of August 18, 2022

Transient Lead Time by Segment & Channel | Europe

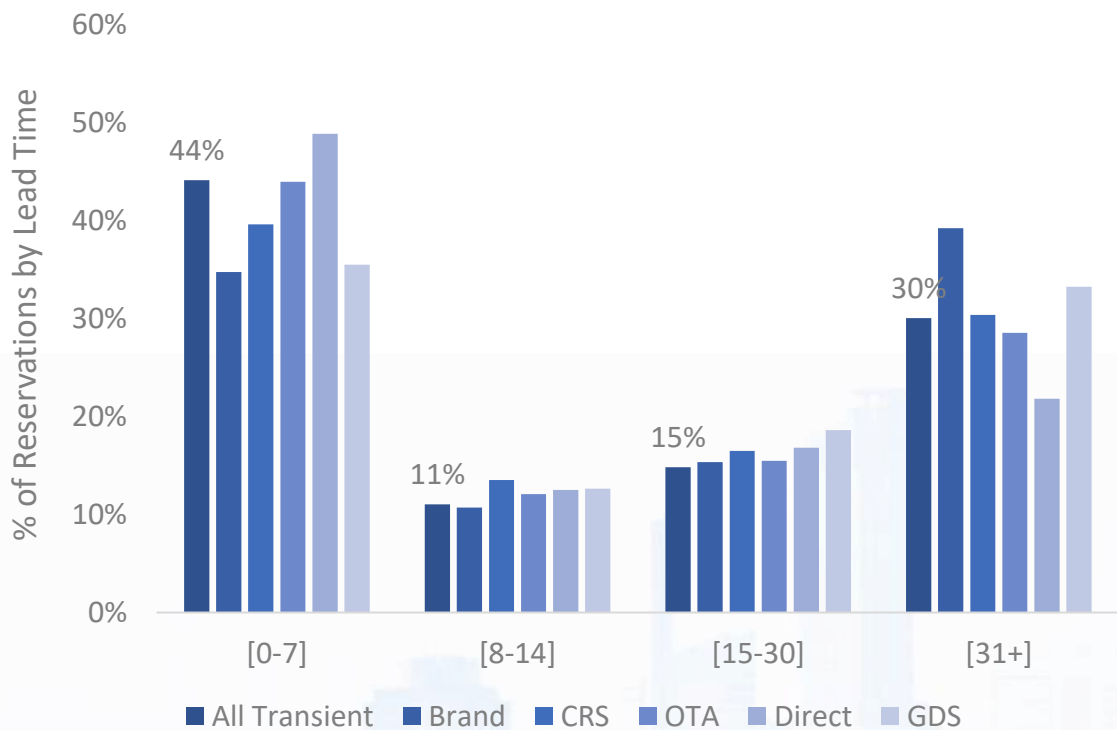Percentage of transient reservations booked by lead time based on the previous 5 weeks of booking activity.

Lead Time by Segment

Lead Time by Channel

©2022 Amadeus. Do not publish or redistribute without the prior written consent of Amadeus. All data is for informational purposes only.
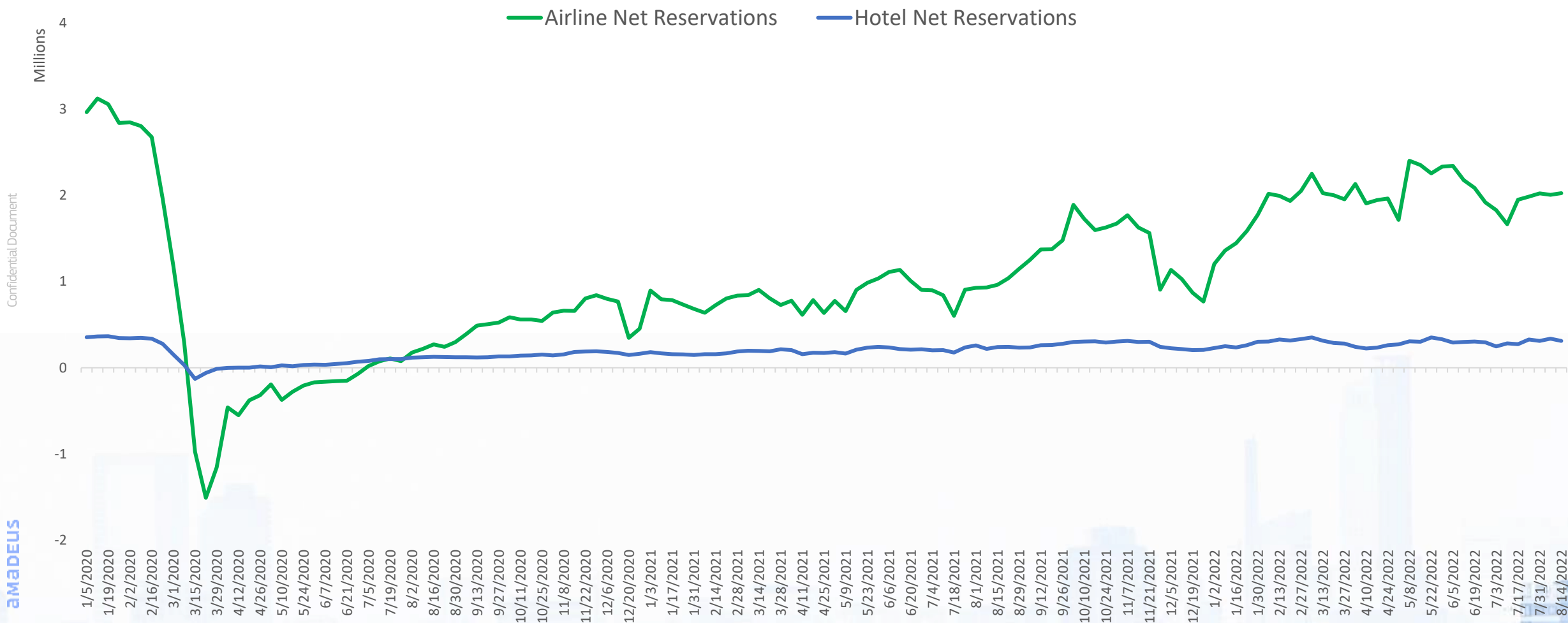
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Middle East & Africa

Airline & Hotel Net Reservations | Middle East & Africa

Below represents the number of net reservations booked during each week for any future travel period.


Source: Amadeus Demand360® and GDS Airline Booking Data (MIDT) data as of August 18, 2022

Monthly Occupancy & Year-on-Year Variance | Middle East & Africa

On-the-books occupancy by month compared to 2021 and 2019.

Forward Looking

Legend:
- 2022
- 2021
- 2019

Data labels (2022): Jan 52%, Feb 61%, Mar 71%, Apr 50%, May 62%, Jun 56%, Jul 55%, Aug 51%, Sep 25%, Oct 19%, Nov 18%, Dec 14%

Source: Amadeus Demand360® data as of August 18, 2022

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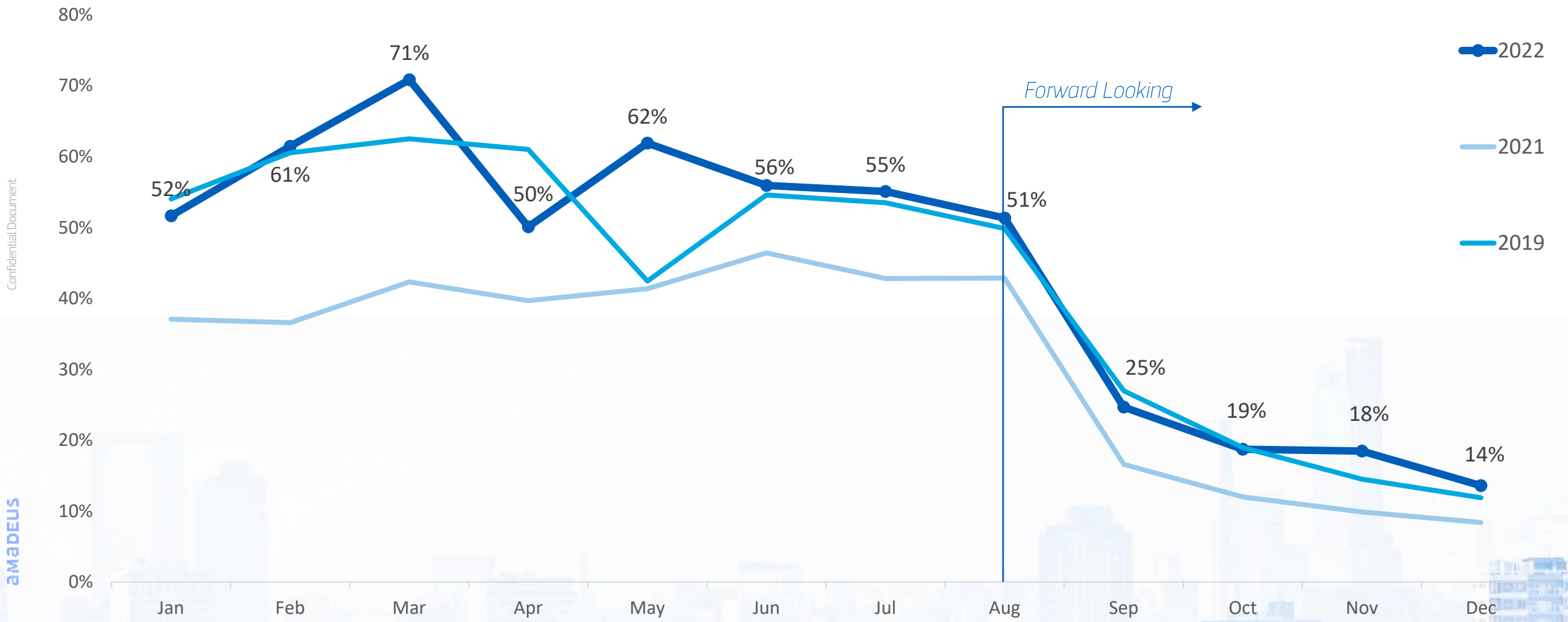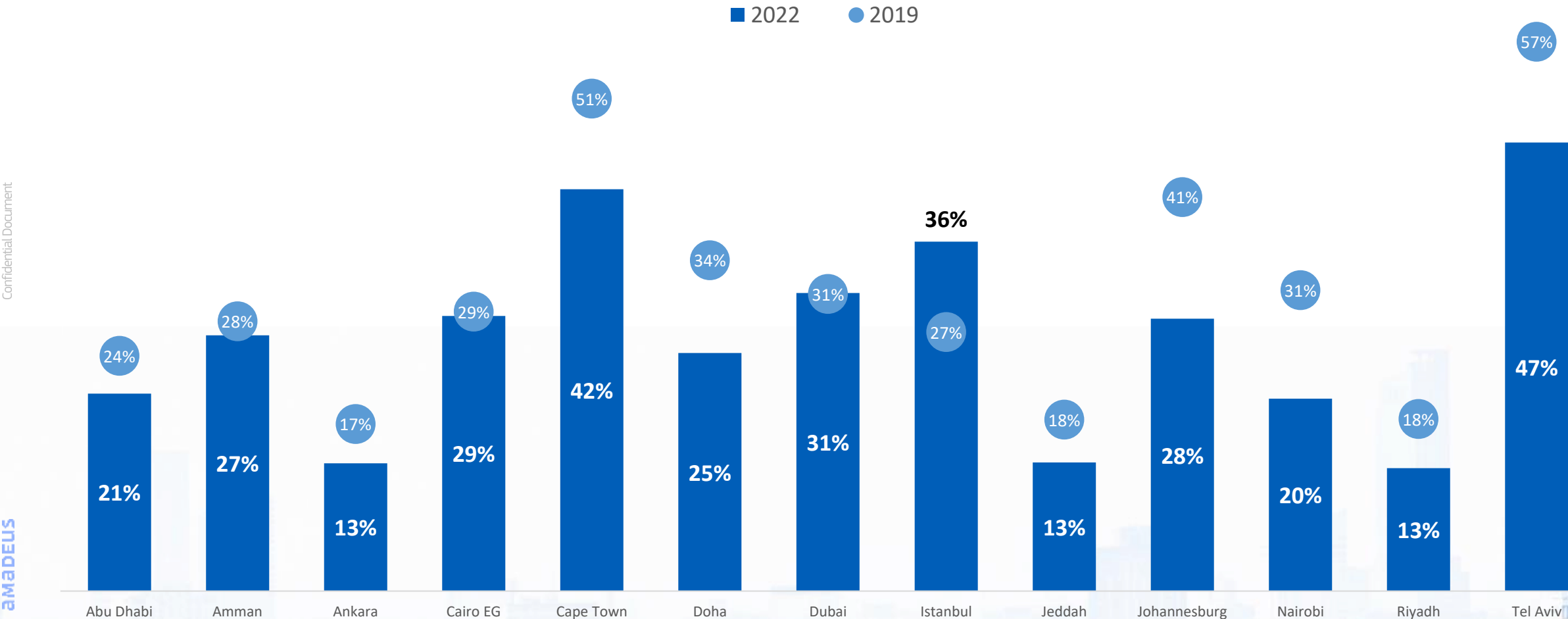
Occupancy by Market & Pace | Middle East & Africa

On-the-books total occupancy by market for September 2022 and same time in 2019.

■ 2022   ● 2019

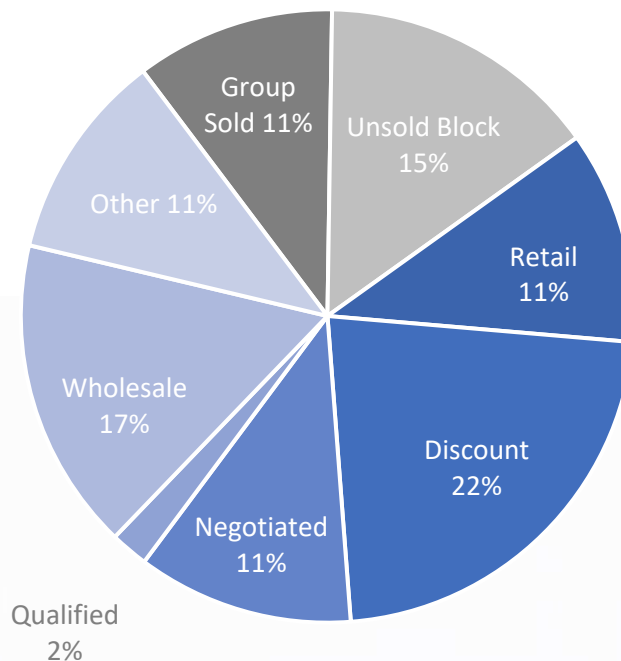| Market	2022	2019
Abu Dhabi	21%	24%
Amman	27%	28%
Ankara	13%	17%
Cairo EG	29%	29%
Cape Town	42%	51%
Doha	25%	34%
Dubai	31%	31%
Istanbul	36%	27%
Jeddah	13%	18%
Johannesburg	28%	41%
Nairobi	20%	31%
Riyadh	13%	18%
Tel Aviv	47%	57%

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Year-on–Year Segmentation | Middle East & Africa

On-the-books market segmentation mix for September 2022 vs same time September 2021 and 2019.

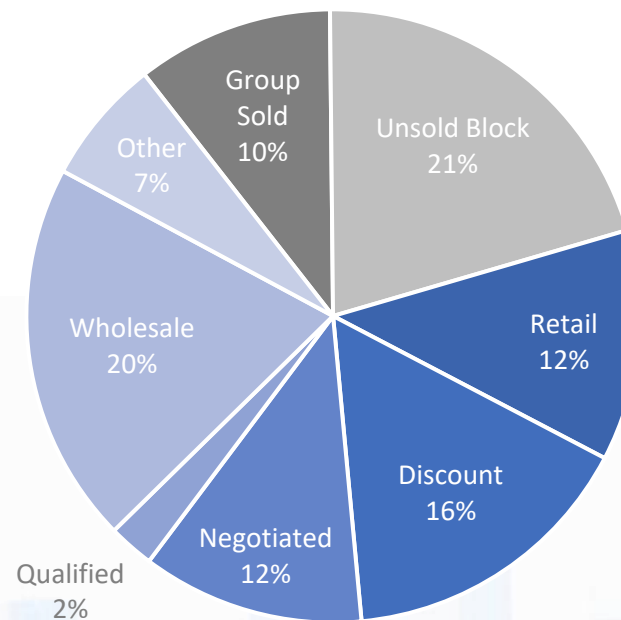## 2022

- Unsold Block 21%
- Retail 10%
- Discount 21%
- Negotiated 10%
- Qualified 2%
- Wholesale 22%
- Other 7%
- Group Sold 8%

2021

- Group Sold 11%
- Unsold Block 15%
- Retail 11%
- Discount 22%
- Negotiated 11%
- Qualified 2%
- Wholesale 17%
- Other 11%

2019

- Group Sold 10%
- Unsold Block 21%
- Retail 12%
- Discount 16%
- Negotiated 12%
- Qualified 2%
- Wholesale 20%
- Other 7%

Source: Amadeus Demand360® data as of August 18, 2022
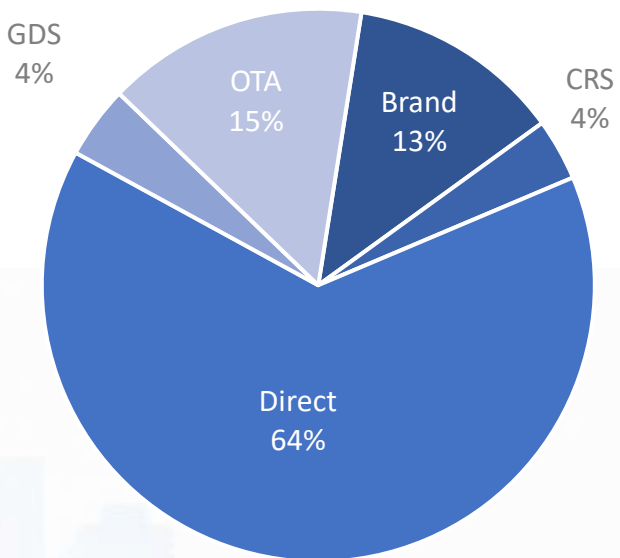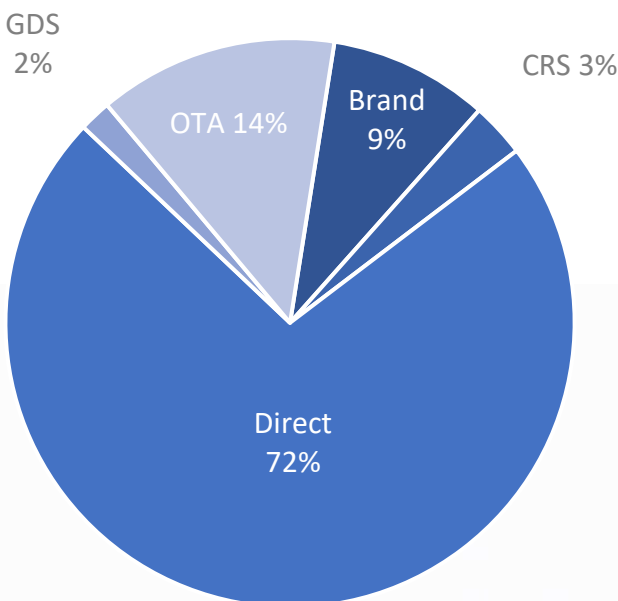
Confidential Document
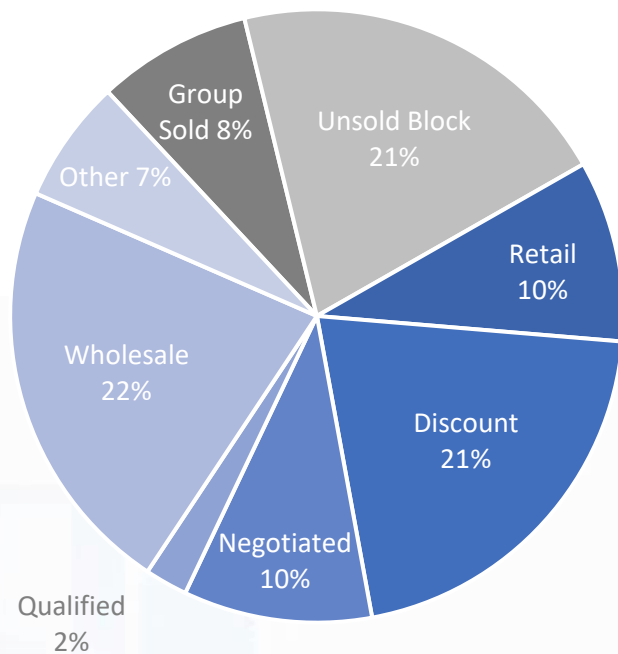
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Year-on-Year Channel Mix | Middle East & Africa

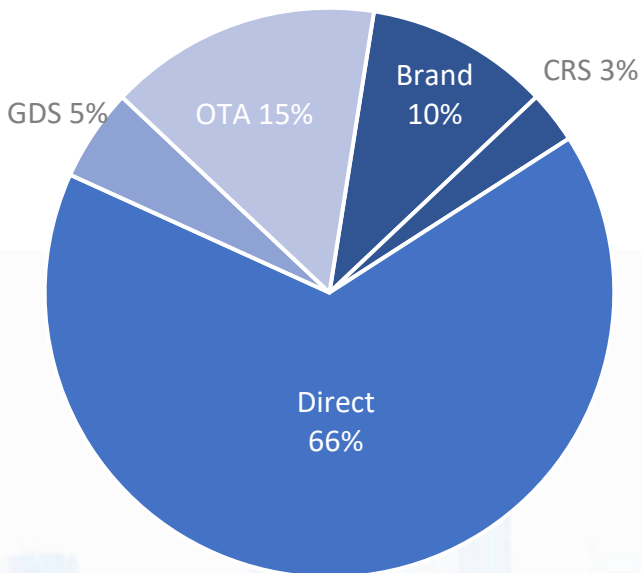On-the-books distribution channel mix for September 2022 vs same time September 2021 and 2019.

2022

GDS 4%
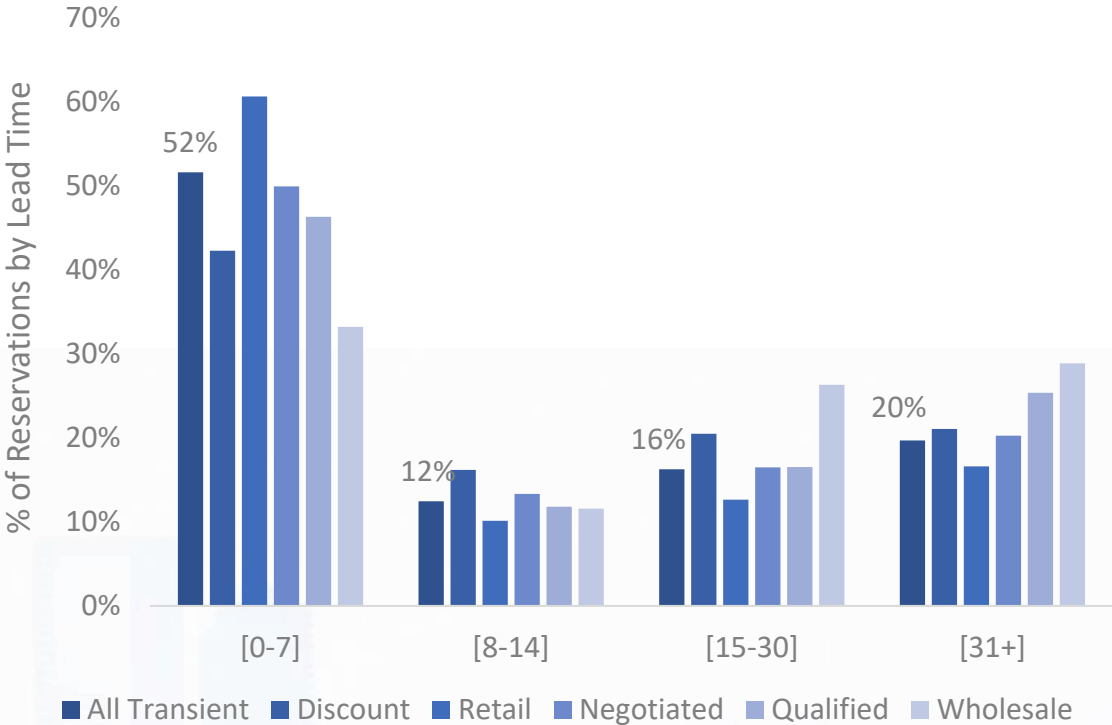OTA 15%
Brand 13%
CRS 4%
Direct 64%

2021

GDS 2%
OTA 14%
Brand 9%
CRS 3%
Direct 72%

2019

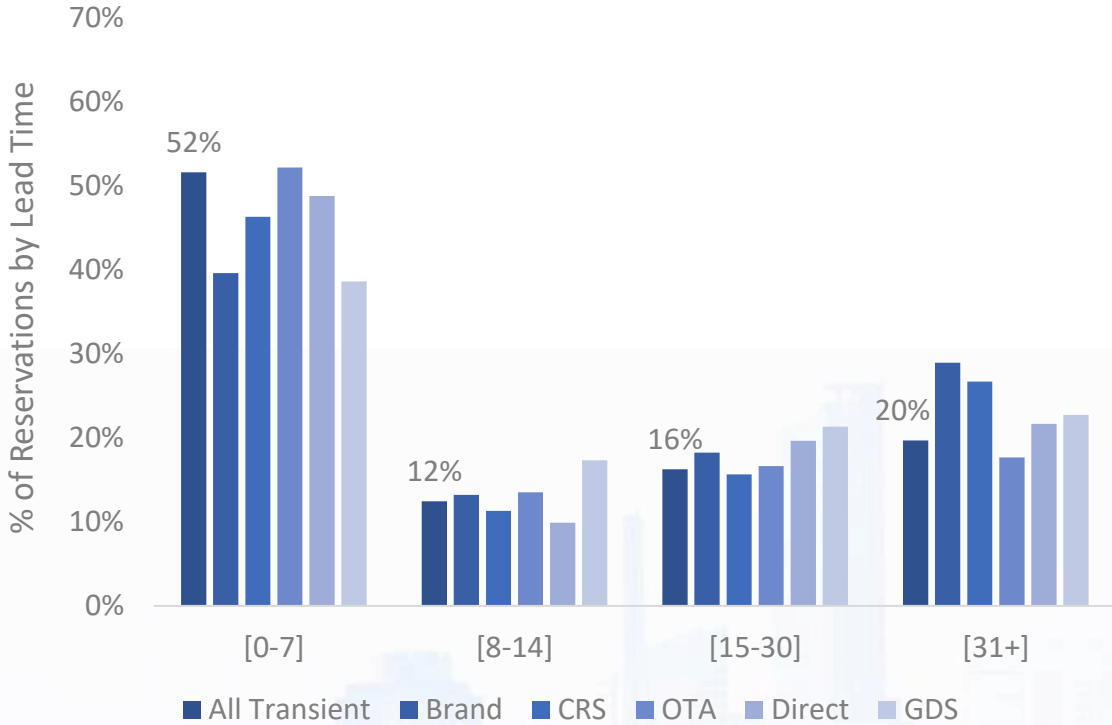GDS 5%
OTA 15%
Brand 10%
CRS 3%
Direct 66%

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Transient Lead Time by Segment & Channel | Middle East & Africa

Percentage of transient reservations booked by lead time based on the previous 5 weeks of booking activity.

Lead Time by Segment

Legend: All Transient, Discount, Retail, Negotiated, Qualified, Wholesale

Lead Time by Channel

Legend: All Transient, Brand, CRS, OTA, Direct, GDS

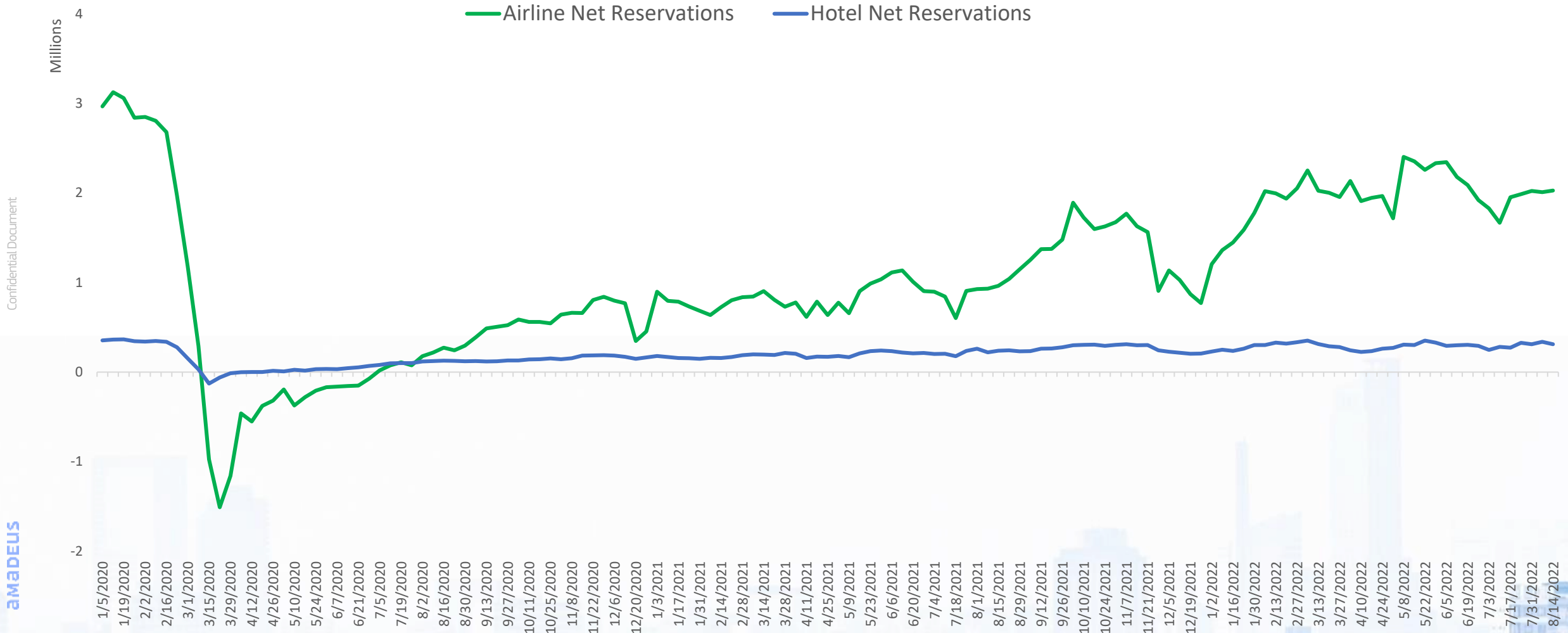Source: Amadeus Demand360® data as of August 18, 2022

Latin America

Airline & Hotel Net Reservations | Latin America

Below represents the number of net reservations booked during each week for any future travel period.
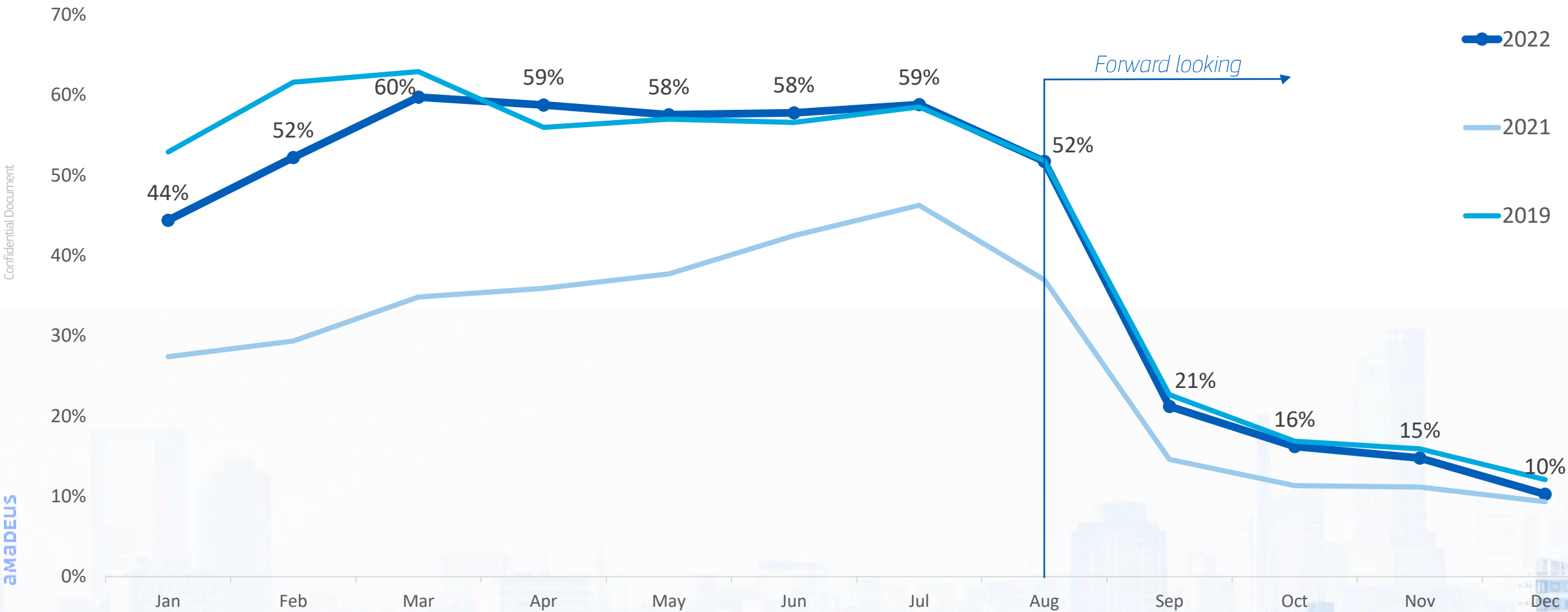

Source: Amadeus Demand360® and GDS Airline Booking Data (MIDT) data as of August 18, 2022

Monthly Occupancy & Year-on-Year Variance | Latin America
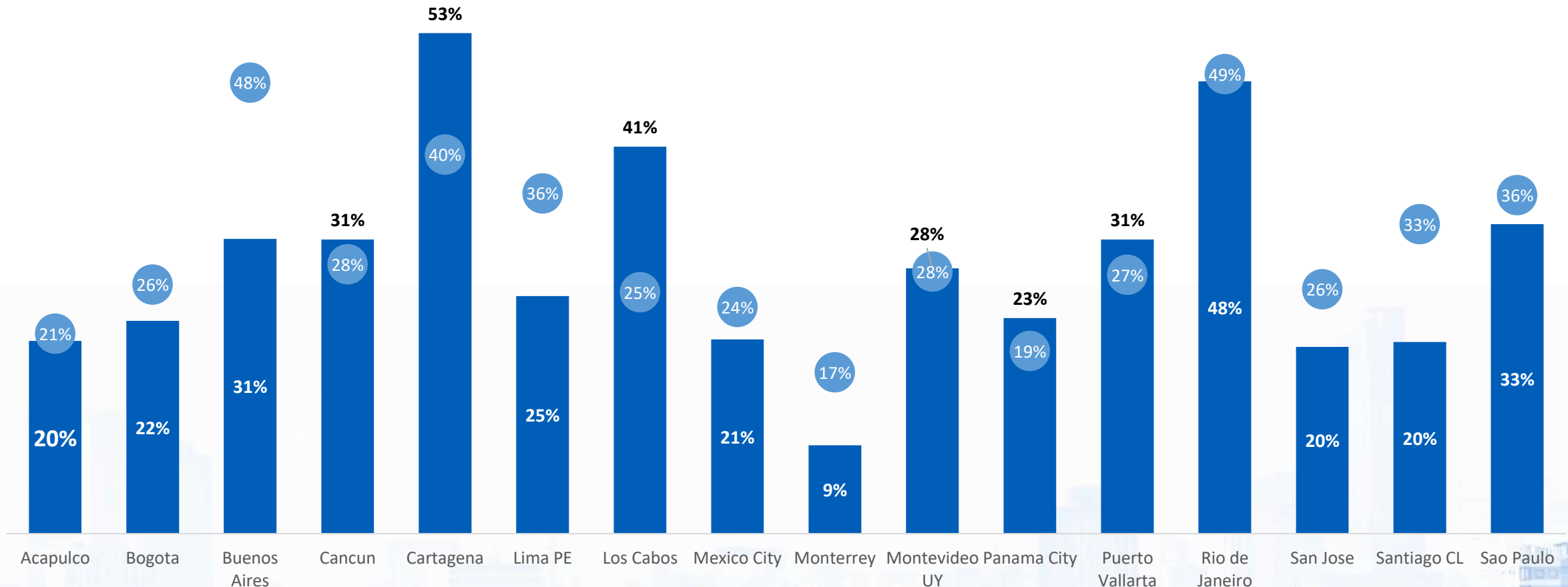
On-the-books occupancy by month compared to 2021 and 2019.

Forward looking

Legend: 2022, 2021, 2019

Data labels (2022 line): 44%, 52%, 60%, 59%, 58%, 58%, 59%, 52%, 21%, 16%, 15%, 10%

Source: Amadeus Demand360® data as of August 18, 2022

Occupancy by Market & Pace | Latin America

On-the-books total occupancy by market for September 2022 vs same time in 2019.

■ 2022 ● 2019

	Acapulco	Bogota	Buenos Aires	Cancun	Cartagena	Lima PE	Los Cabos	Mexico City	Monterrey	Montevideo UY	Panama City	Puerto Vallarta	Rio de Janeiro	San Jose	Santiago CL	Sao Paulo
2022	20%	22%	31%	31%	53%	25%	41%	21%	9%	28%	23%	31%	48%	20%	20%	33%
2019	21%	26%	48%	28%	40%	36%	25%	24%	17%	28%	19%	27%	49%	26%	33%	36%

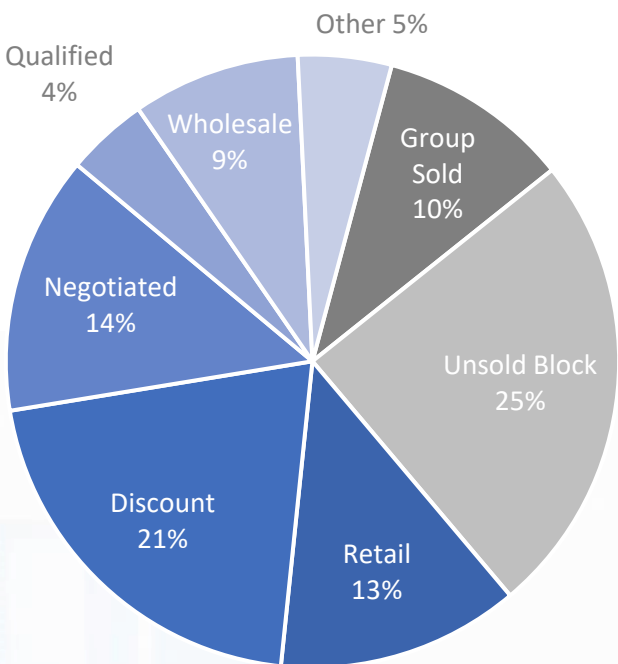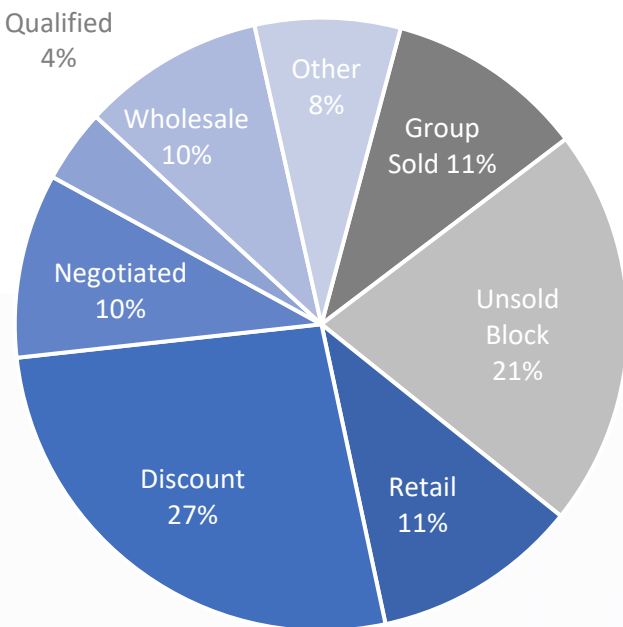Source: Amadeus Demand360® data as of August 18, 2022

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Year-on-Year Segmentation | Latin America

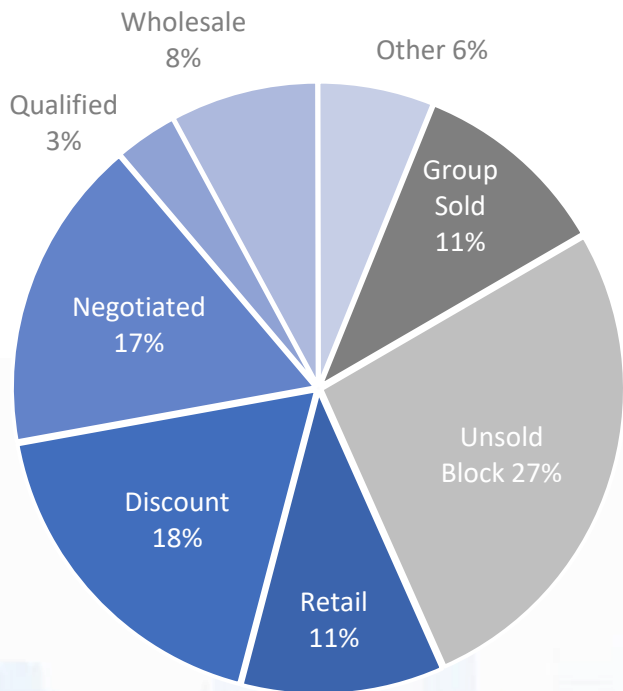On-the-books market segmentation mix for September 2022 vs same time September 2021 and 2019.

2022

- Other 5%
- Qualified 4%
- Wholesale 9%
- Group Sold 10%
- Negotiated 14%
- Unsold Block 25%
- Discount 21%
- Retail 13%

2021

- Qualified 4%
- Other 8%
- Wholesale 10%
- Group Sold 11%
- Negotiated 10%
- Unsold Block 21%
- Discount 27%
- Retail 11%

2019

- Wholesale 8%
- Other 6%
- Qualified 3%
- Group Sold 11%
- Negotiated 17%
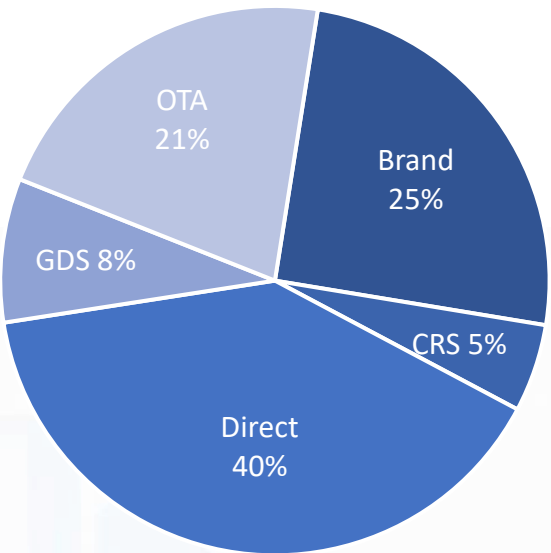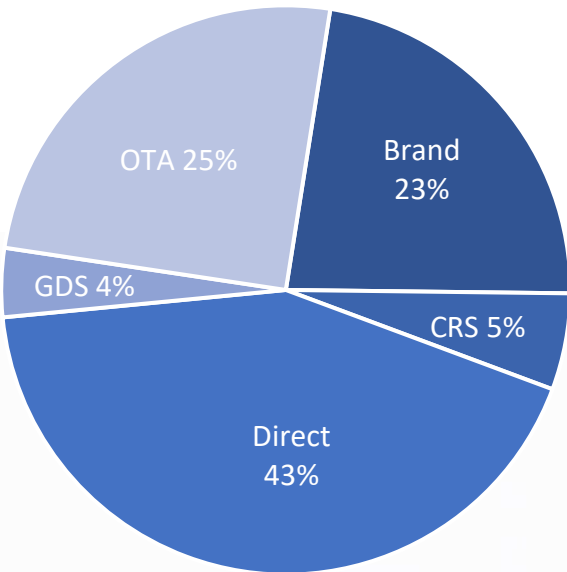- Unsold Block 27%
- Discount 18%
- Retail 11%

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Year-on-Year Channel Mix | Latin America

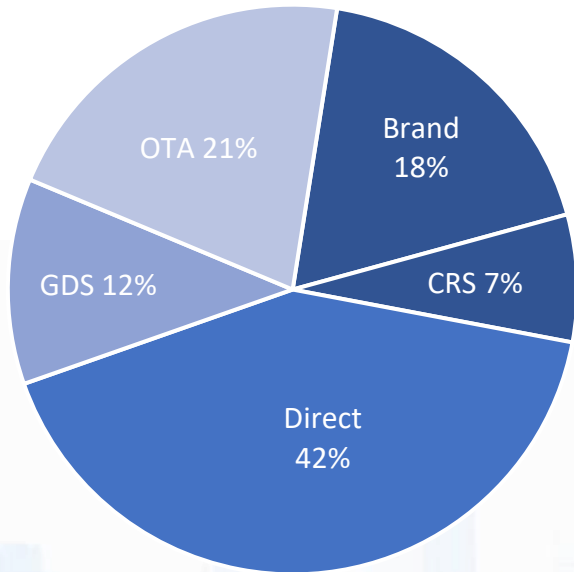On-the-books distribution channel mix for September 2022 vs same time September 2021 and 2019.

2022

- OTA 21%
- Brand 25%
- GDS 8%
- CRS 5%
- Direct 40%

2021

- OTA 25%
- Brand 23%
- GDS 4%
- CRS 5%
- Direct 43%

2019

- OTA 21%
- Brand 18%
- GDS 12%
- CRS 7%
- Direct 42%

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Source: Amadeus Demand360® data as of August 18, 2022

Transient Lead Time by Segment & Channel | Latin America

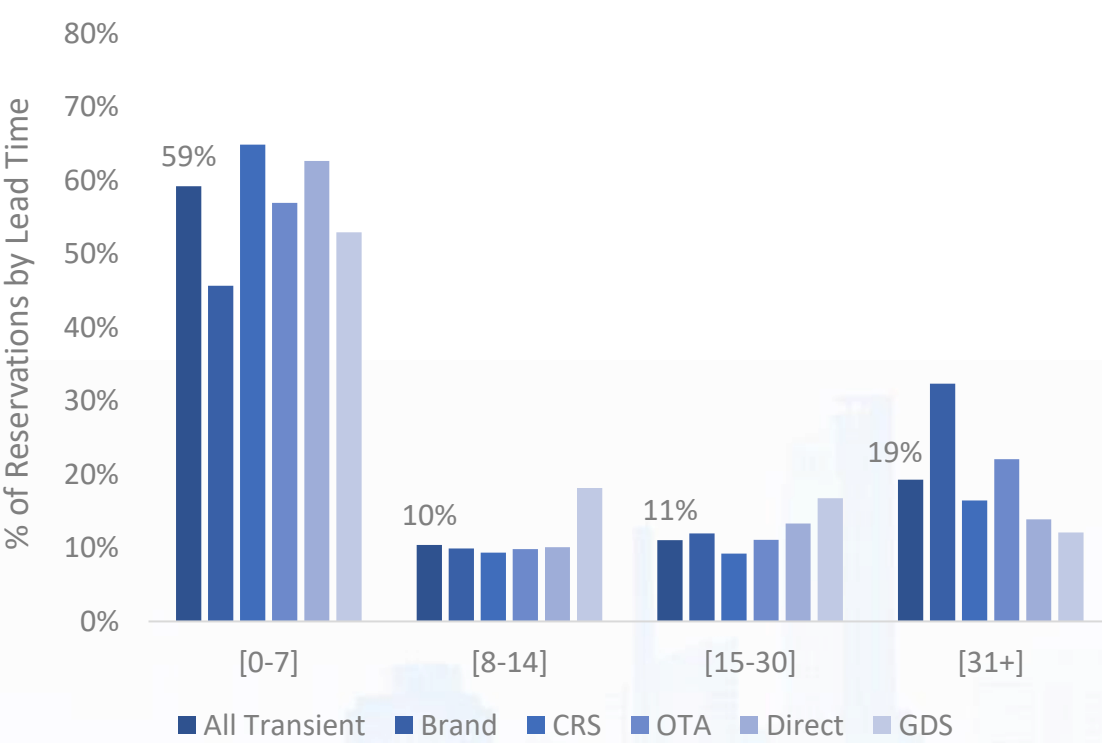Percentage of transient reservations booked by lead time based on the previous 5 weeks of booking activity.

Lead Time by Segment

■ All Transient   ■ Discount   ■ Retail   ■ Negotiated   ■ Qualified   ■ Wholesale

Lead Time by Channel

■ All Transient   ■ Brand   ■ CRS   ■ OTA   ■ Direct   ■ GDS

Source: Amadeus Demand360® data as of August 18, 2022

Visit our website to learn more about Recovery Insights.

To request time to talk with an Amadeus representative, please contact us.

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