

Hospitality Market Insights Report

June

RENEW
TRAVEL WITH US

Executive Summary

Worldwide occupancy continues improving year-on-year in almost all regions. Europe is leading occupancy in June with Group shares exceeding 2019 levels.

The **U.S.** is experiencing a slight contraction in occupancy for June, trailing the same time last year by 2% points and same time 2019 by 6% points. This may be the first time this year that occupancy does not exceed last year's levels

Canada has turned a corner and, due to a significant contribution from the Group segment, is now exceeding on-the-books occupancy for June vs. same time last year and same time 2019.

China has continued its spectacular growth with occupancy levels beyond 2019 for an entire quarter. Over 75% of stays are booked within a week of arrival. Retail and Group are now driving larger shares as compared to 2019 levels.

The **Rest of Asia** continues growing year-on-year. Occupancy in Bali has now outpaced 2019 levels, with Tokyo leading occupancy in the region. Brand.com & Group are gaining momentum in June, with shares now larger than in 2019.

In **Europe**, occupancy continues growing as summer approaches, with Athens heading to a “sold out” status in June. Brand shares are higher than in 2019, displacing OTA and close to Direct.

Middle East & Africa Group shares continue exceeding 2019 levels, with slightly shorter booking windows. Brand is seeing a shift from OTAs for the second consecutive month.

Latin America’s occupancy exceeded 2019 levels over the first four months and is fairly well aligned for the remainder of the year. Occupancy within key leisure markets in the Caribbean is in some cases ahead of 2019 levels for June, but in most cases, it is behind last year. There is a noticeable shift to Brand.com from other channels year-on-year.



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Top 10 Markets for Air Arrivals

Worldwide and regional air passenger arrivals in June 2023

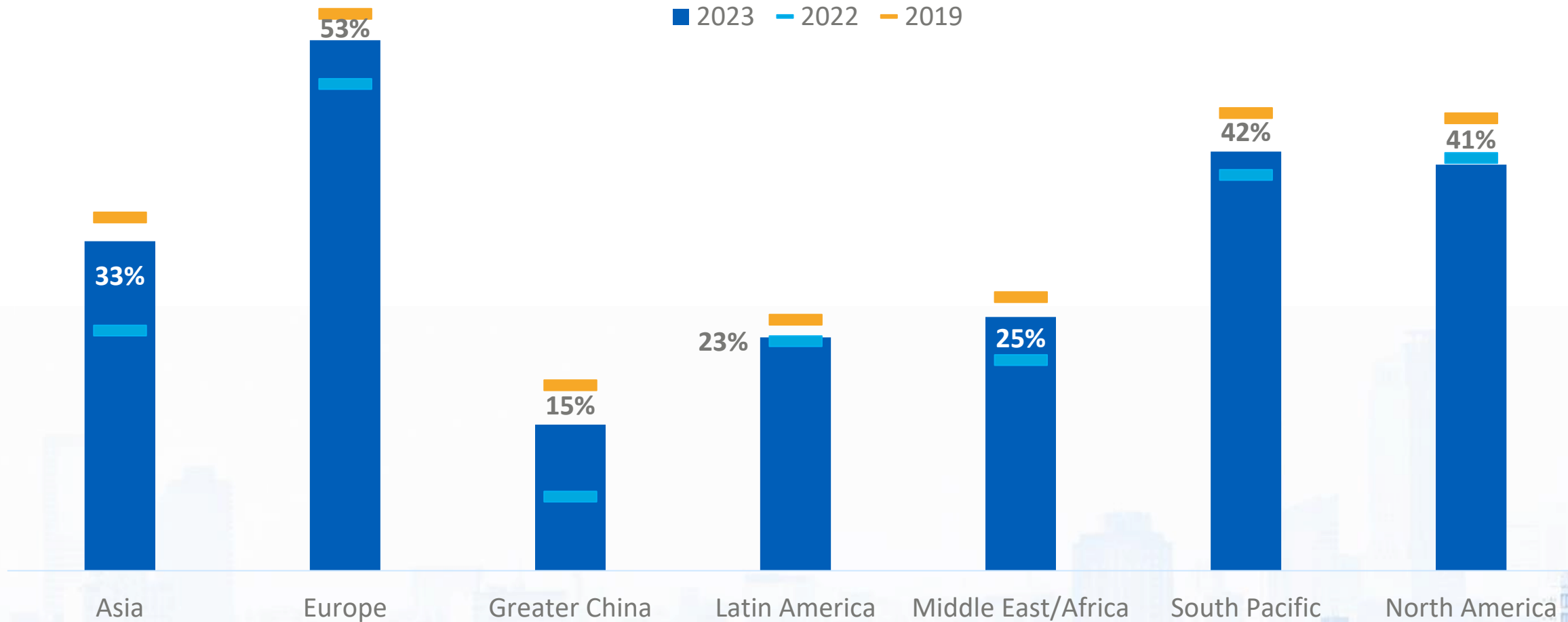
	Worldwide	Asia	Canada	Caribbean	Europe	Greater China	Latin America	Middle East - Africa	South Pacific	United States
1	London	Tokyo	Toronto	Montego Bay	London	Beijing	Sao Paulo	Dubai	Sydney	New York City
2	New York City	Moscow	Vancouver	Nassau	Paris	Shanghai	Mexico City	Jeddah	Melbourne	Los Angeles
3	Beijing	Delhi	Montreal	Oranjestad	Istanbul	Chengdu	Cancun	Riyadh	Brisbane	Chicago
4	Paris	Bangkok	Calgary	Belize City	Milan	Shenzhen	Bogota	Tel Aviv	Auckland	Washington DC
5	Shanghai	Seoul	Edmonton	Port of Spain	Barcelona	Guangzhou	Buenos Aires	Cairo	Perth	Orlando
6	Chengdu	Jakarta	Winnipeg	Kingston	Palma de Mallorca	Chongqing	Rio de Janeiro	Johannesburg	Adelaide	Dallas
7	Tokyo	Mumbai	Ottawa	Pointe-a-Pitre	Rome	Kunming	Lima PE	Kuwait City	Gold Coast	Las Vegas
8	Los Angeles	Ho Chi Minh City	Halifax/Enfield	Fort de France	Madrid	Hangzhou	Guadalajara	Sharjah	Christchurch	Atlanta
9	Moscow	Singapore	Victoria	Saint Thomas	Amsterdam	Taipei	Santiago	Doha	Wellington	Denver
10	Delhi	Kuala Lumpur	Kelowna	Curacao	Frankfurt	Zhengzhou	Tijuana	Dammam	Cairns	Boston

Hotel Occupancy by Region | Worldwide

On-the-books hotel occupancy by region for June 2023 vs. same time last year and in 2019.

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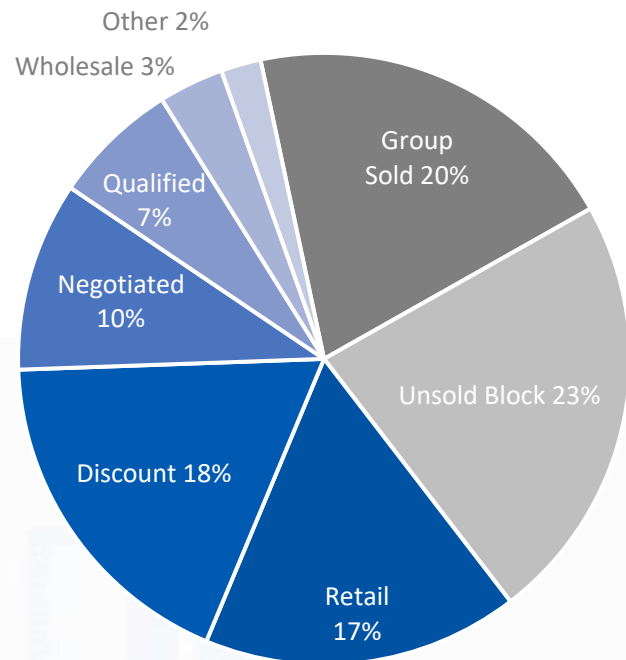
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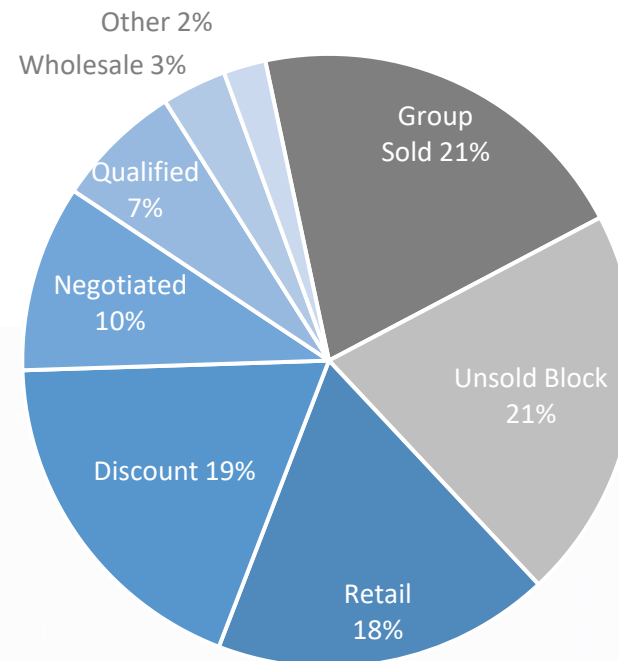
Year-on-Year Segmentation | Worldwide

On-the-books segmentation for June 2023 vs. same time last year and in 2019.

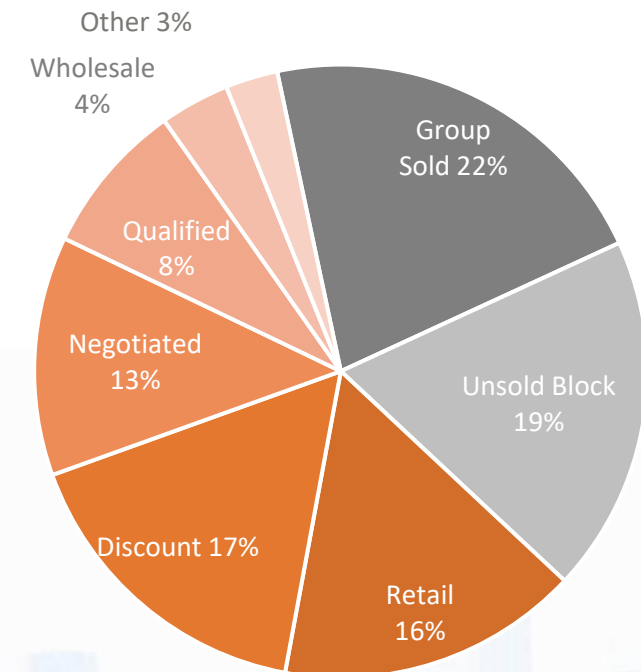
2023



2022



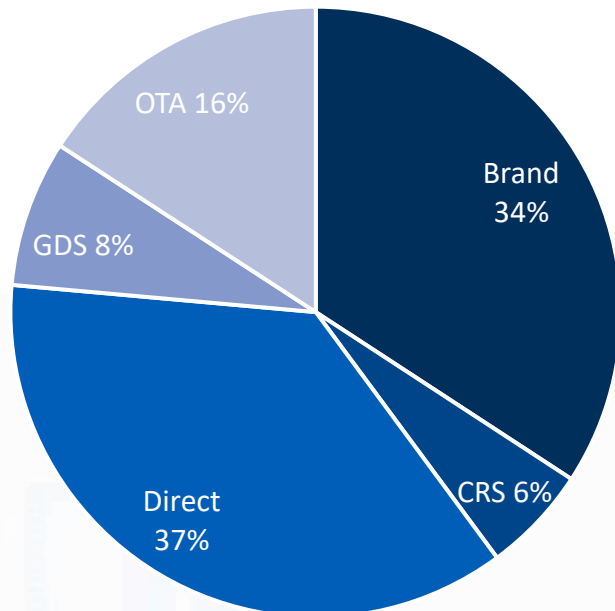
2019



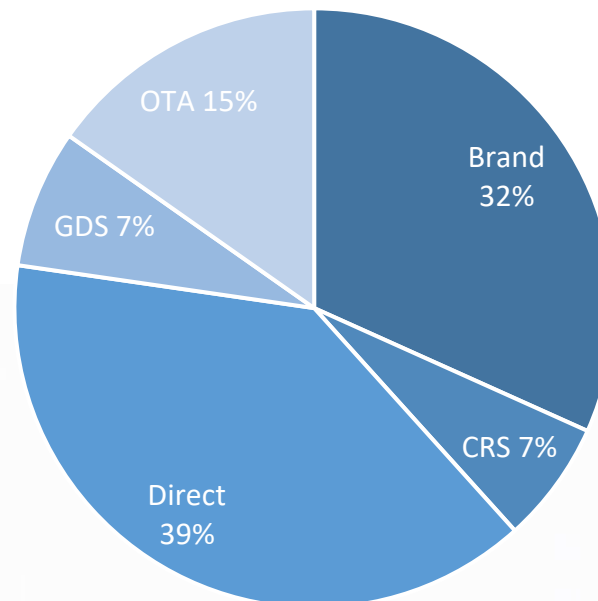
Year-on-Year Channel Mix | Worldwide

On-the-books distribution channel mix for June 2023 vs. same time last year and in 2019.

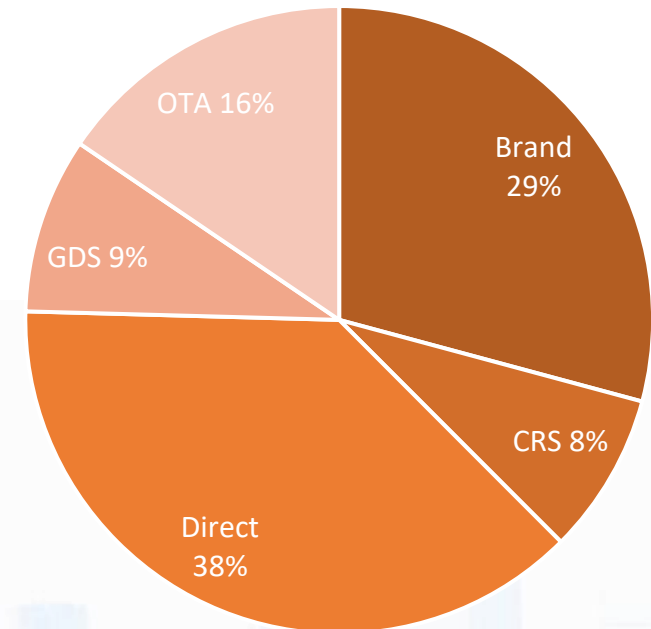
2023



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United States

Airline Year-on-Year Net Reservations | United States

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

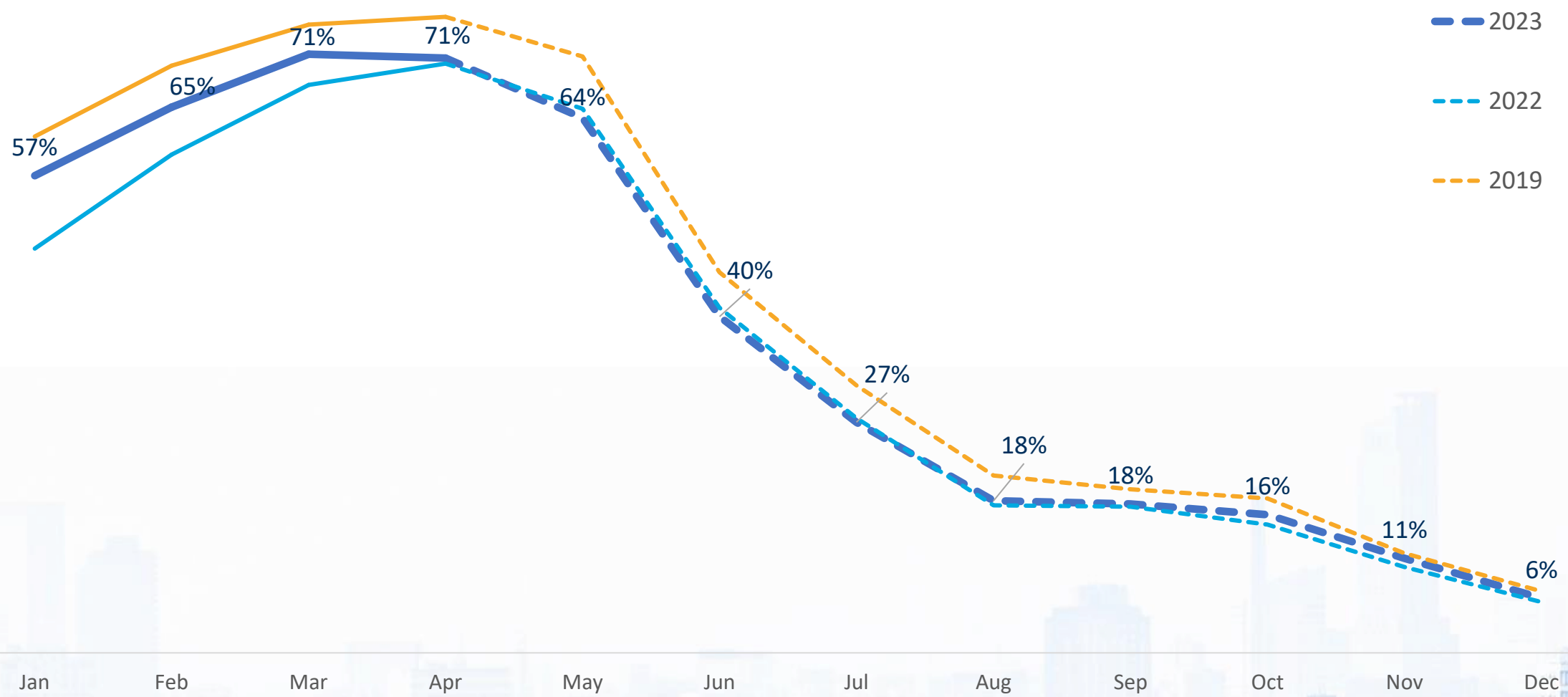


Source: Amadeus GDS Airline Booking Data (MIDT) data as of May 18, 2023

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

2023 occupancy by month compared to 2022 and 2019.

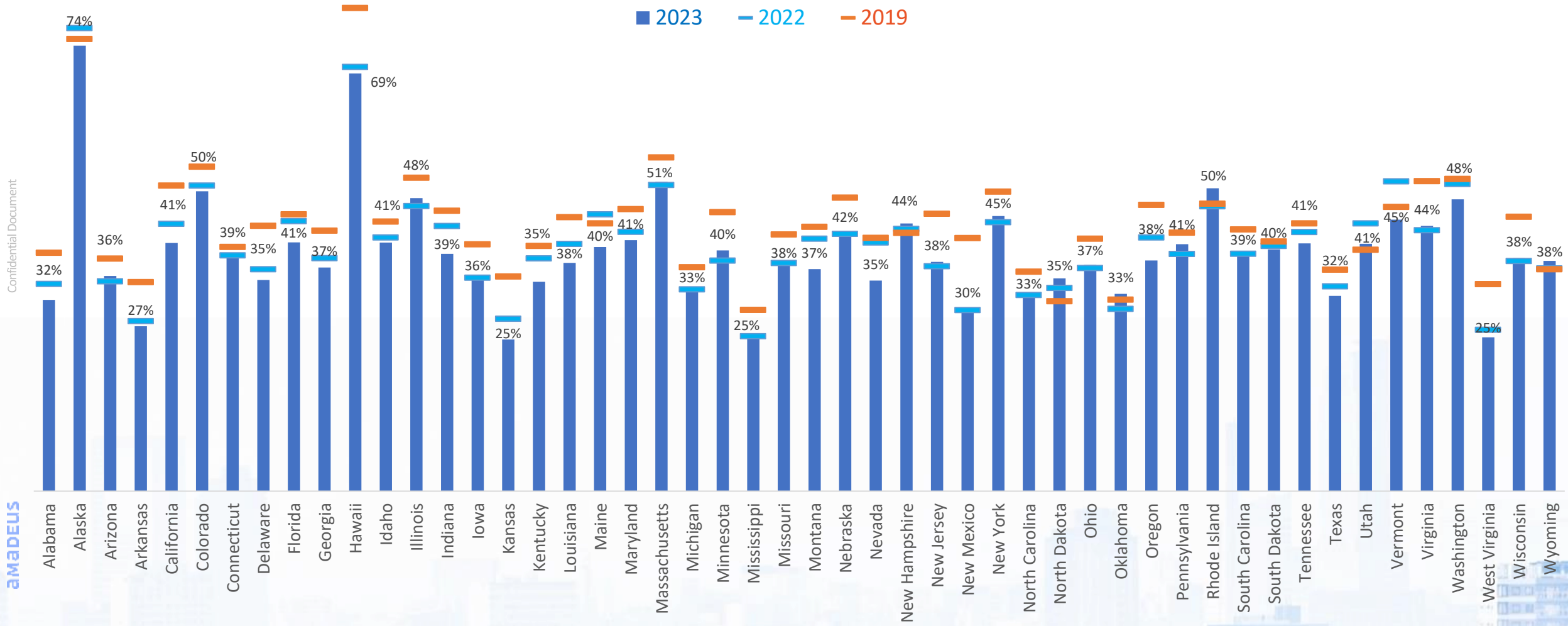


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Occupancy & Pace by State | United States

On-the-books total occupancy by state for June 2023 vs. same time last year and in 2019.

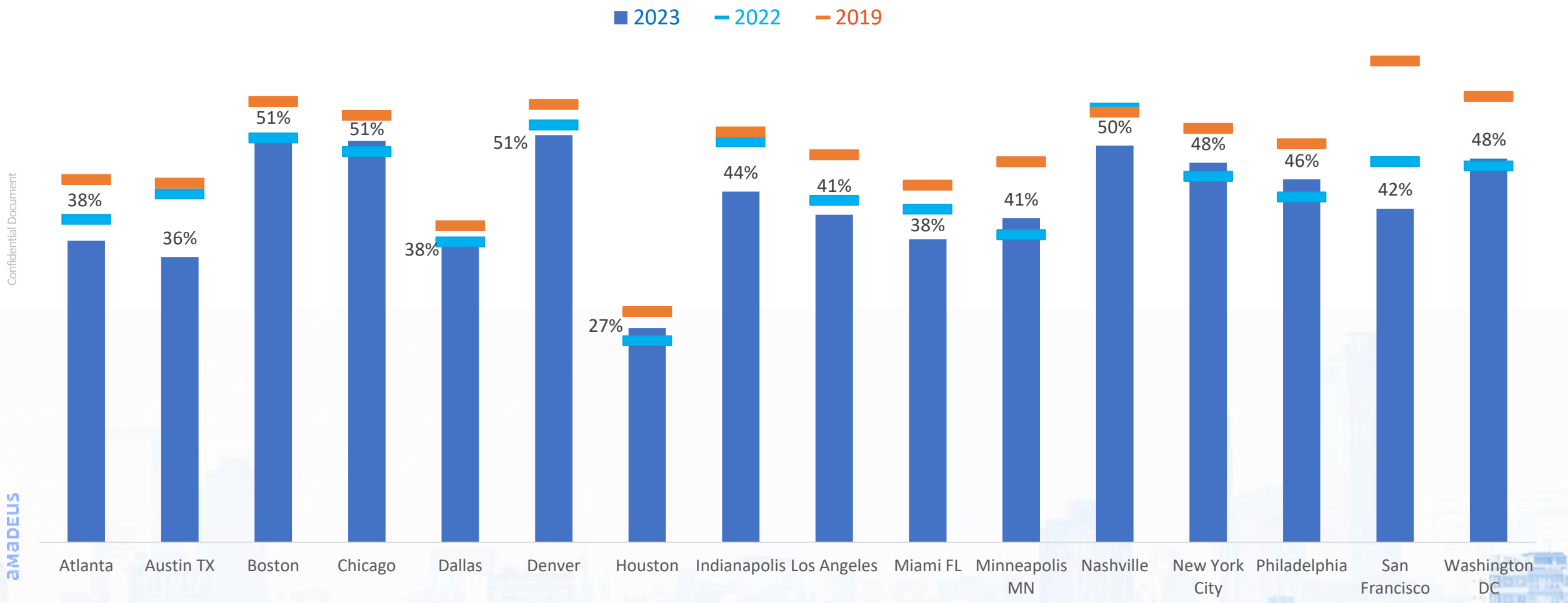


Source: Amadeus Demand360® data as of May 18, 2023

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Occupancy & Pace by Market | United States

On-the-books total occupancy by market for June 2023 vs. same time last year and in 2019.



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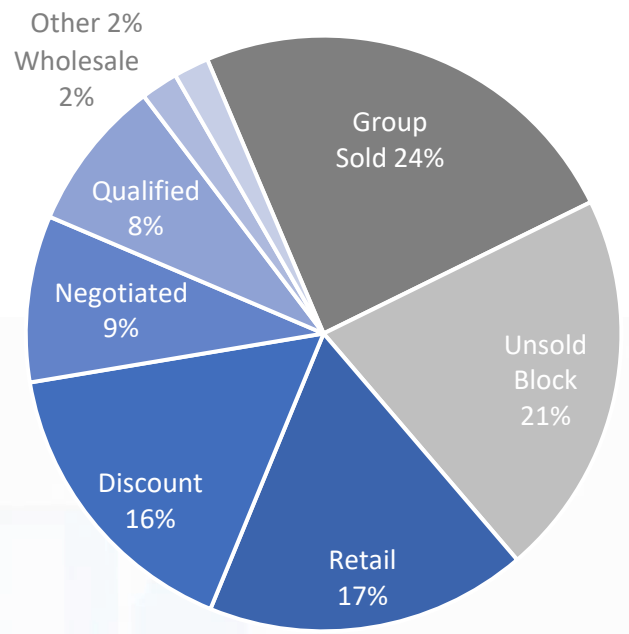
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Year-on-Year Segmentation | United States

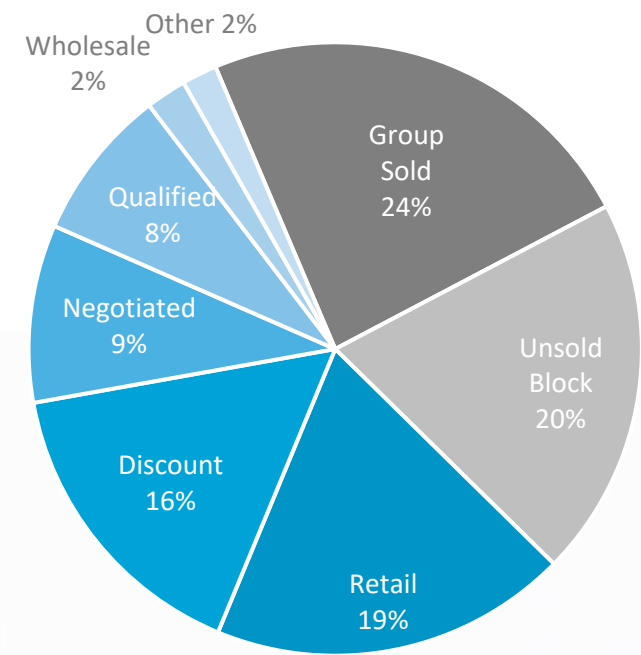
On-the-books market segmentation mix for June 2023 vs. same time last year and in 2019.

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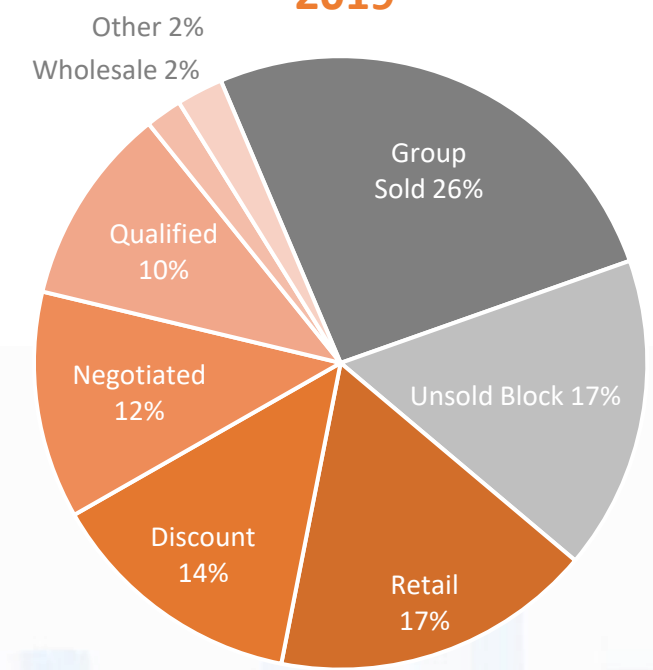
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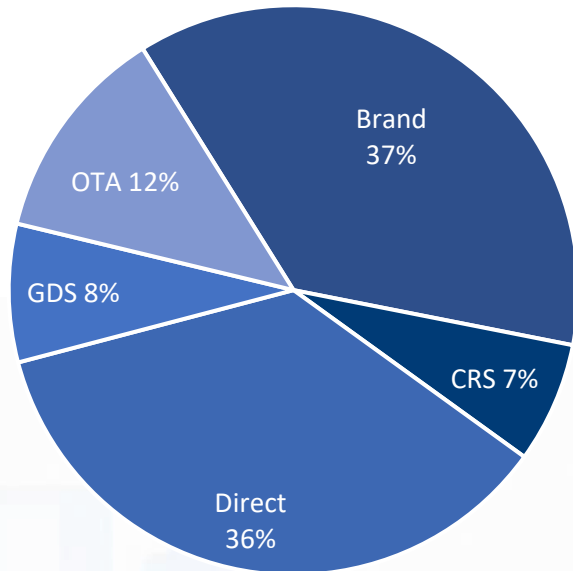


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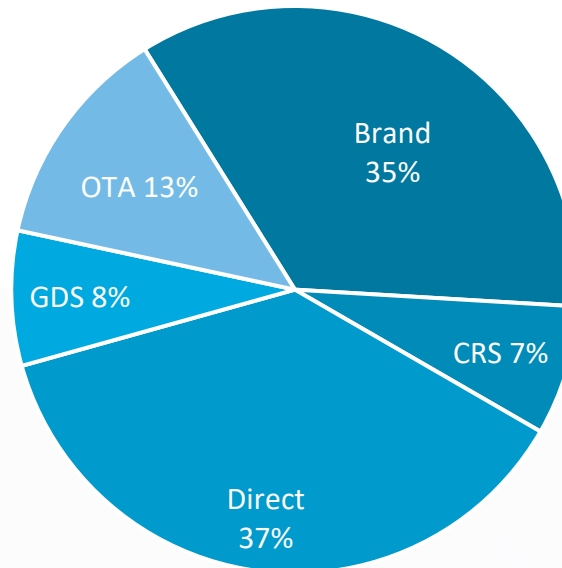
Year-on-Year Channel Mix | United States

On-the-books distribution channel mix for June 2023 vs. same time last year and in 2019.

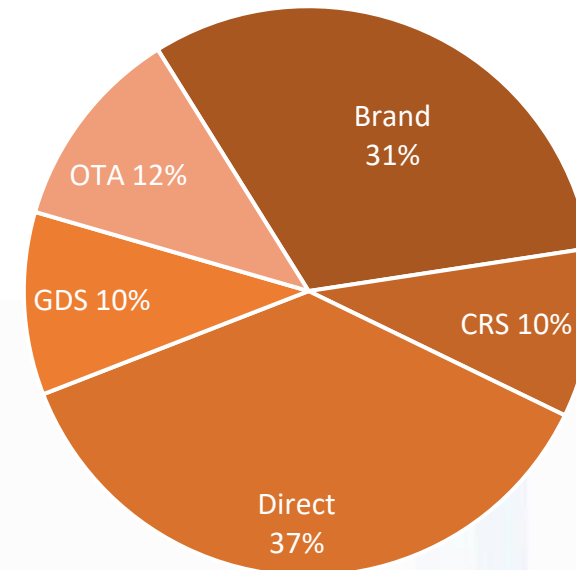
2023



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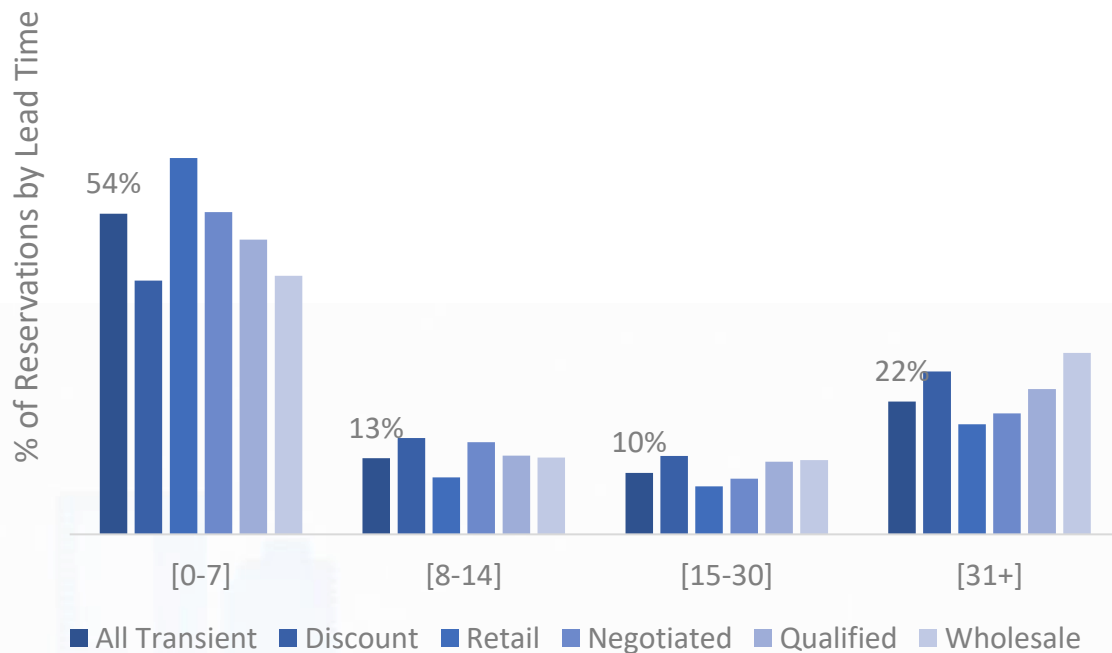
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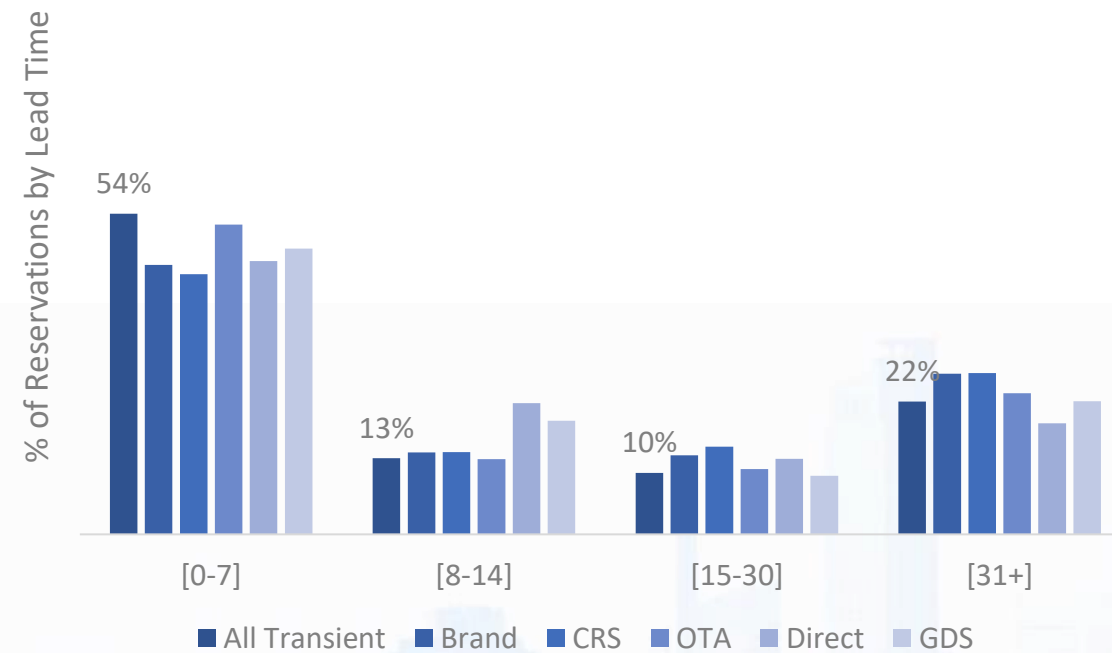
Transient Lead Time by Segment & Channel | United States

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

Lead Time by Segment



Lead Time by Channel



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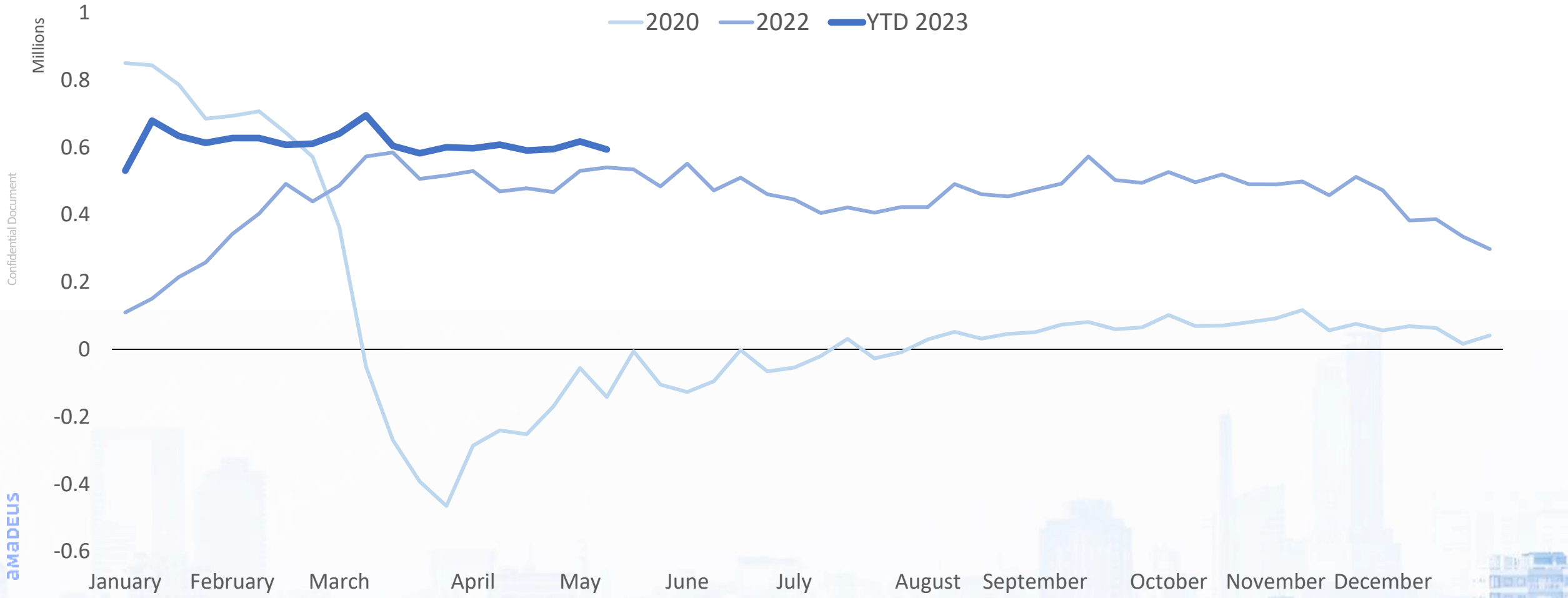
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Canada

Airline Year-on-Year Net Reservations | Canada

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



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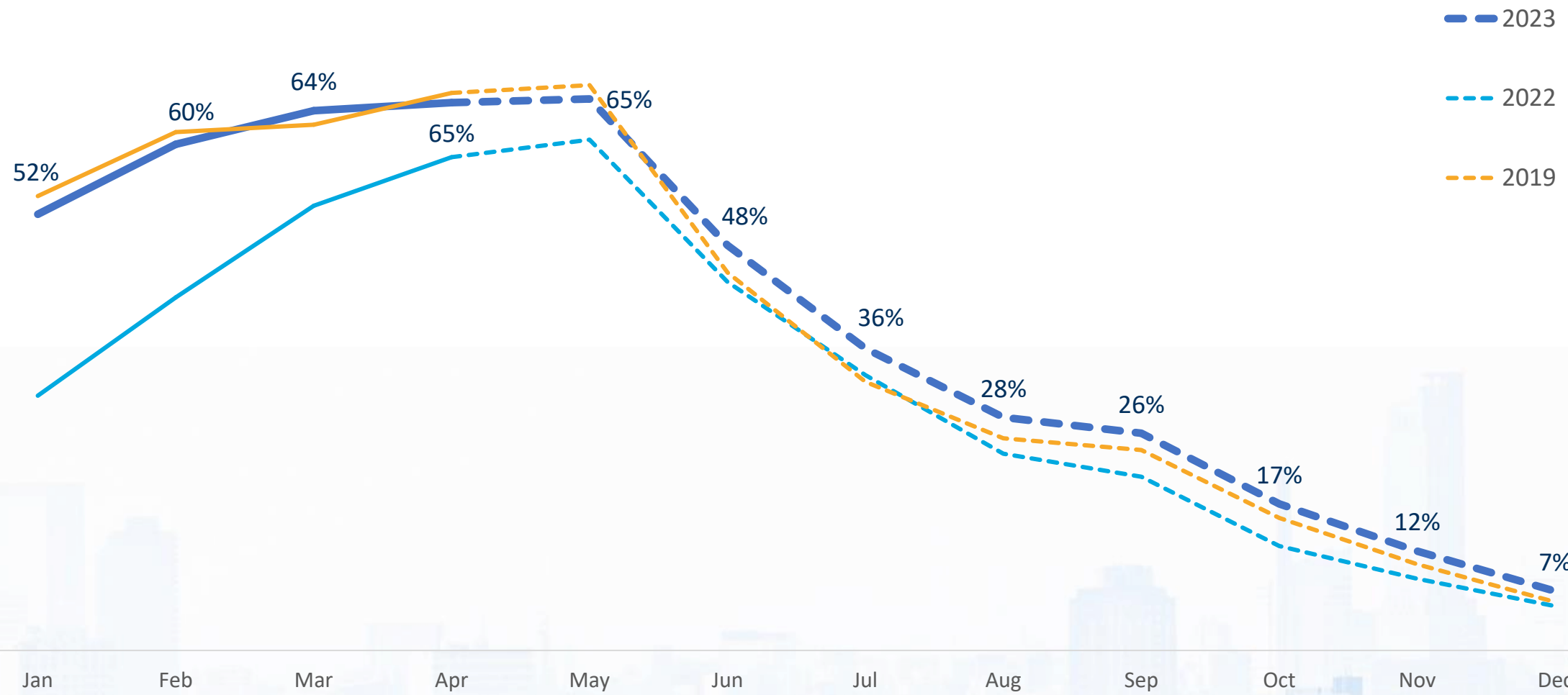
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Monthly Occupancy & Year-on-Year Variance | Canada

2023 occupancy by month compared to 2022 and 2019.

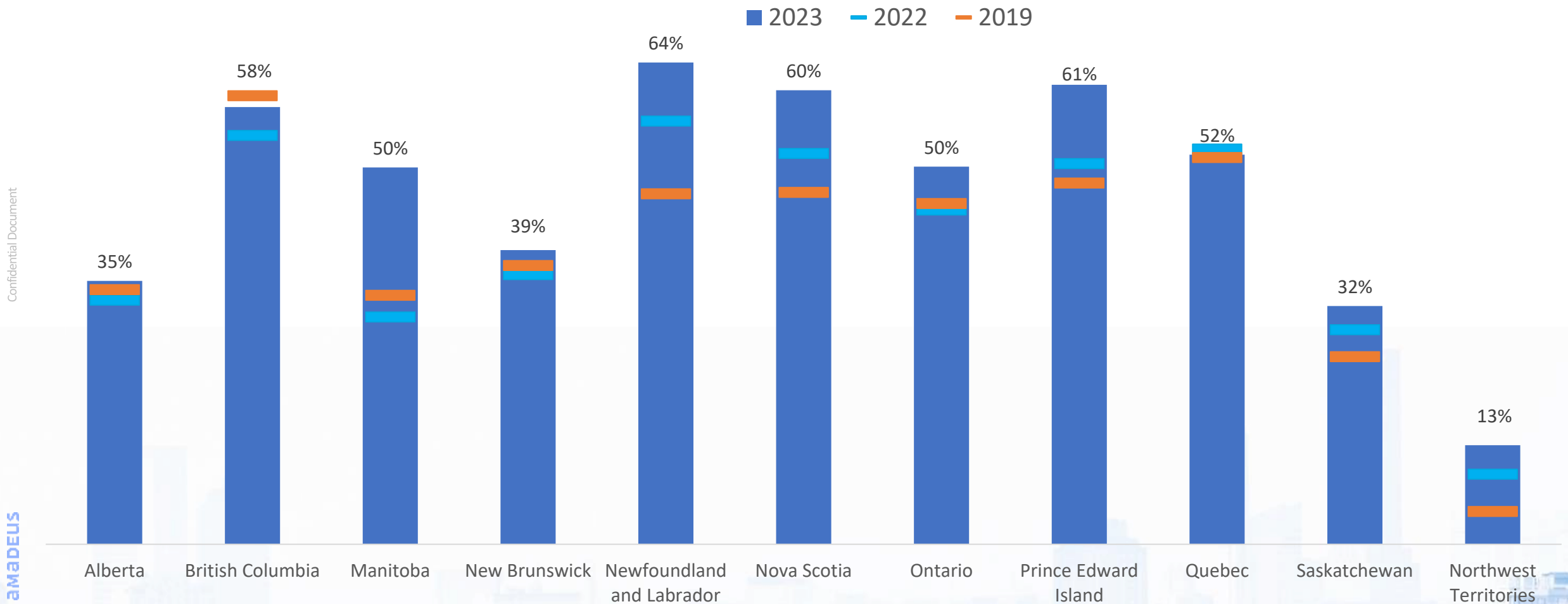


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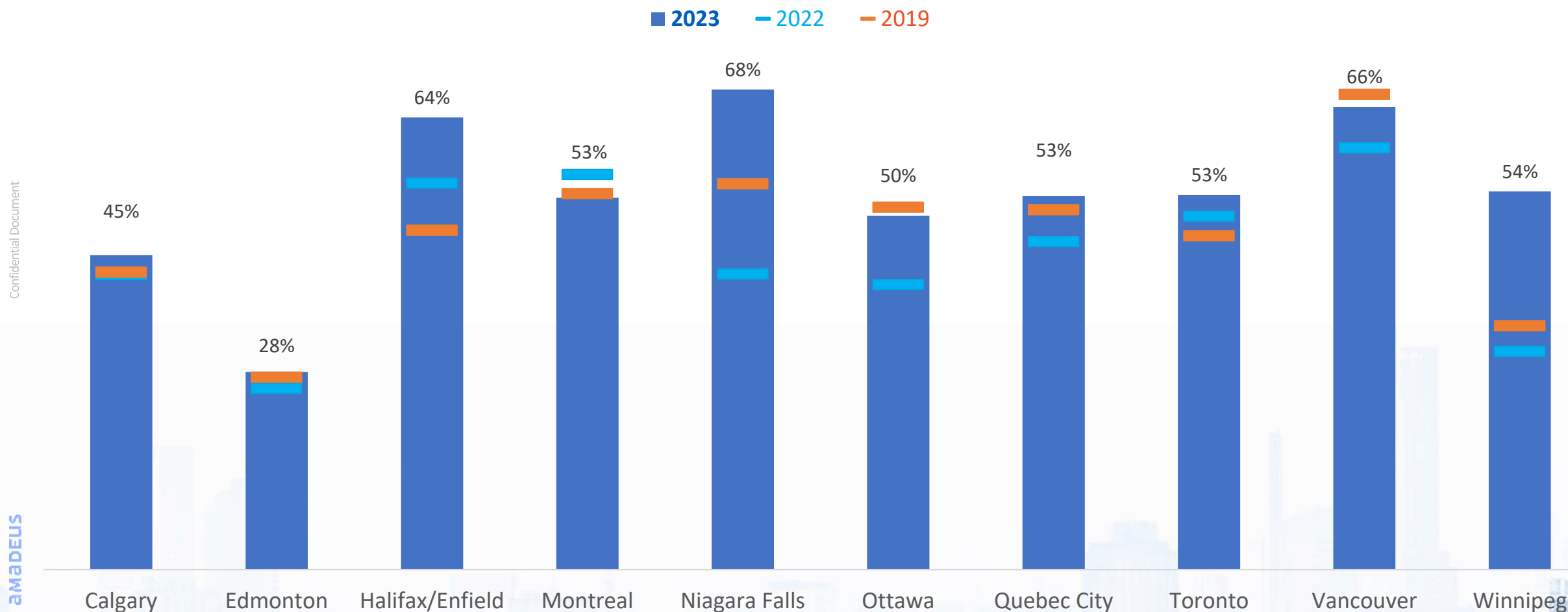
Occupancy & Pace by Province | Canada

On-the-books total occupancy by province for June 2023 vs. same time last year and in 2019.



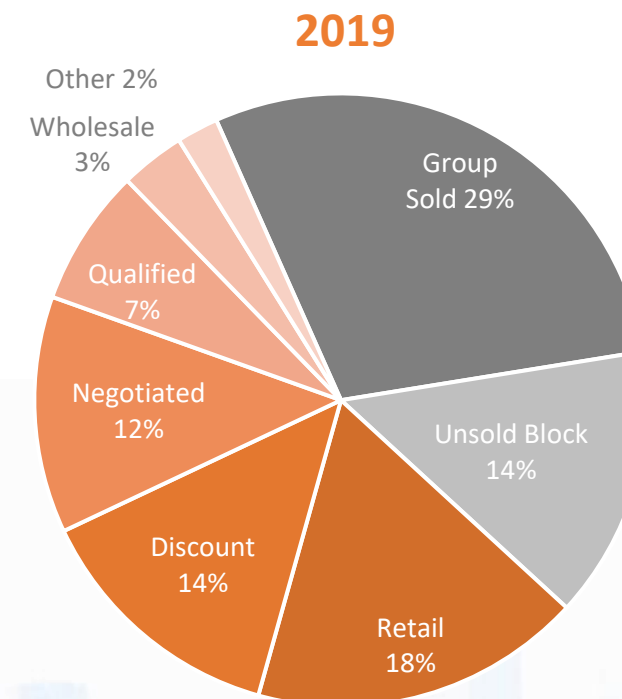
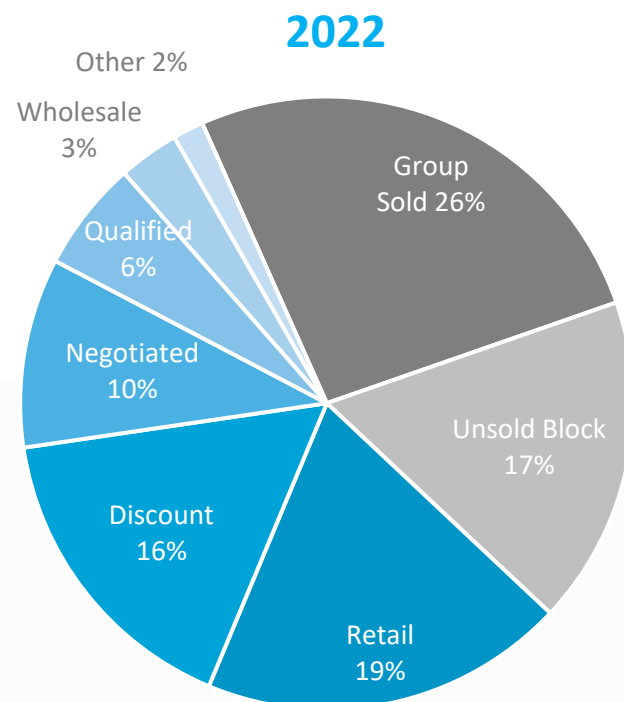
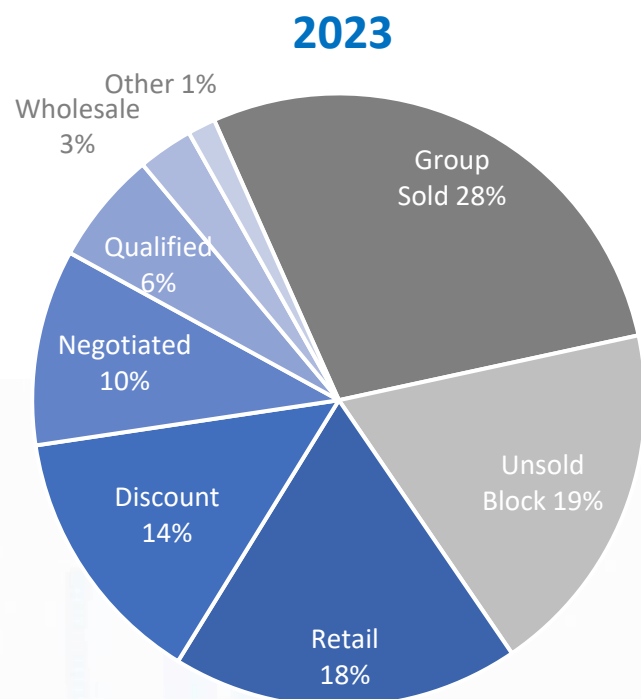
Occupancy & Pace by Market | Canada

On-the-books total occupancy by market for June 2023 vs. same time last year and in 2019.



Year-on-Year Segmentation | Canada

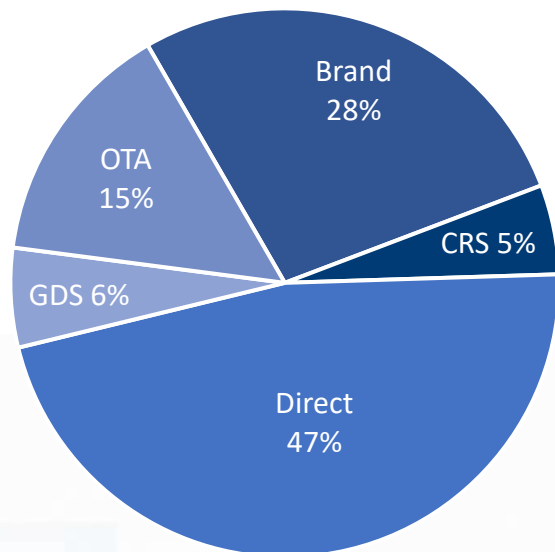
On-the-books market segmentation mix for June 2023 vs. same time last year and in 2019.



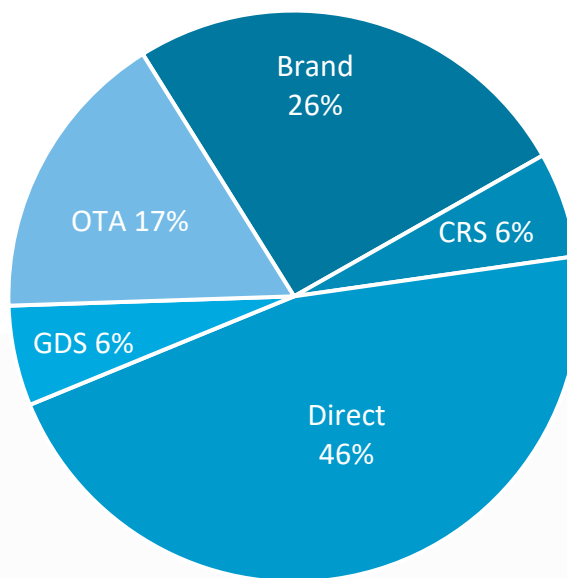
Year-on-Year Channel Mix | Canada

On-the-books distribution channel mix for June 2023 vs. same time last year and in 2019.

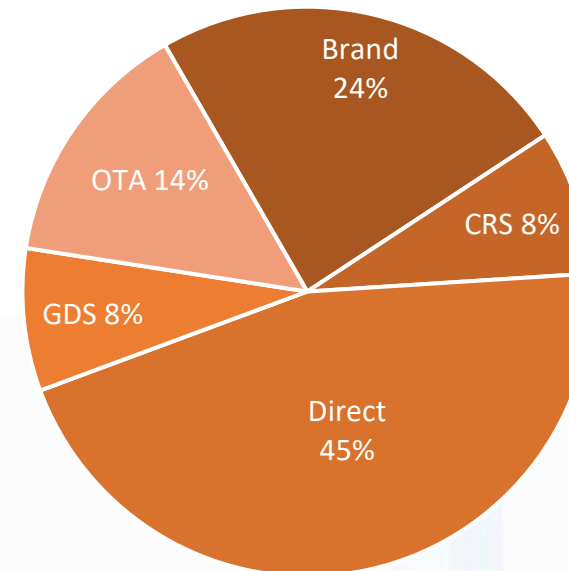
2023



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2019



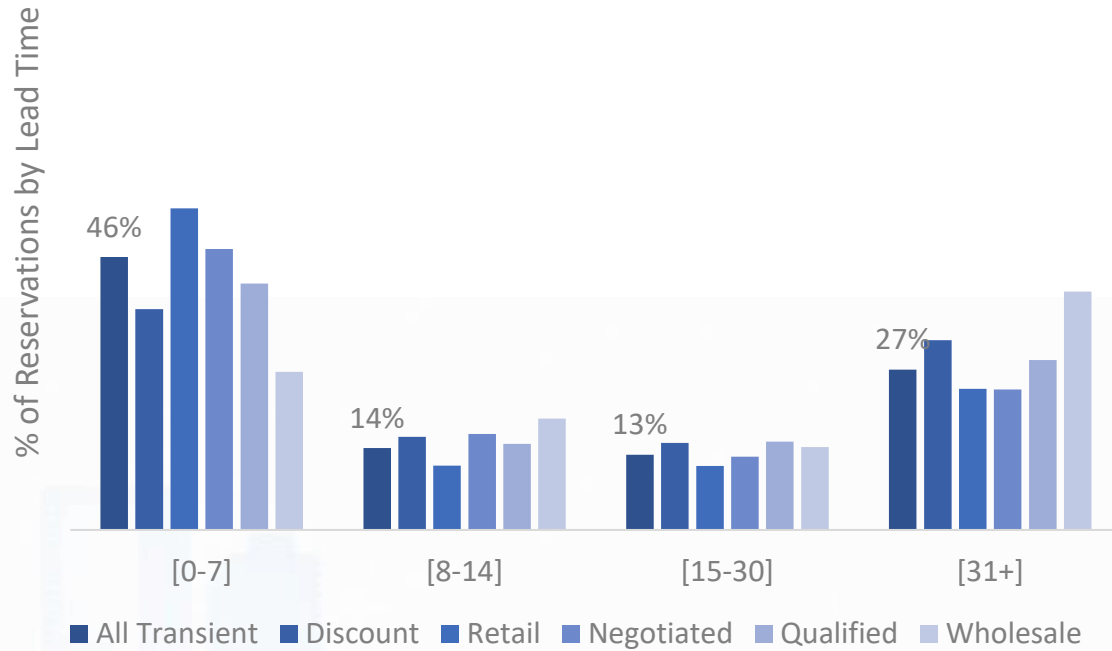
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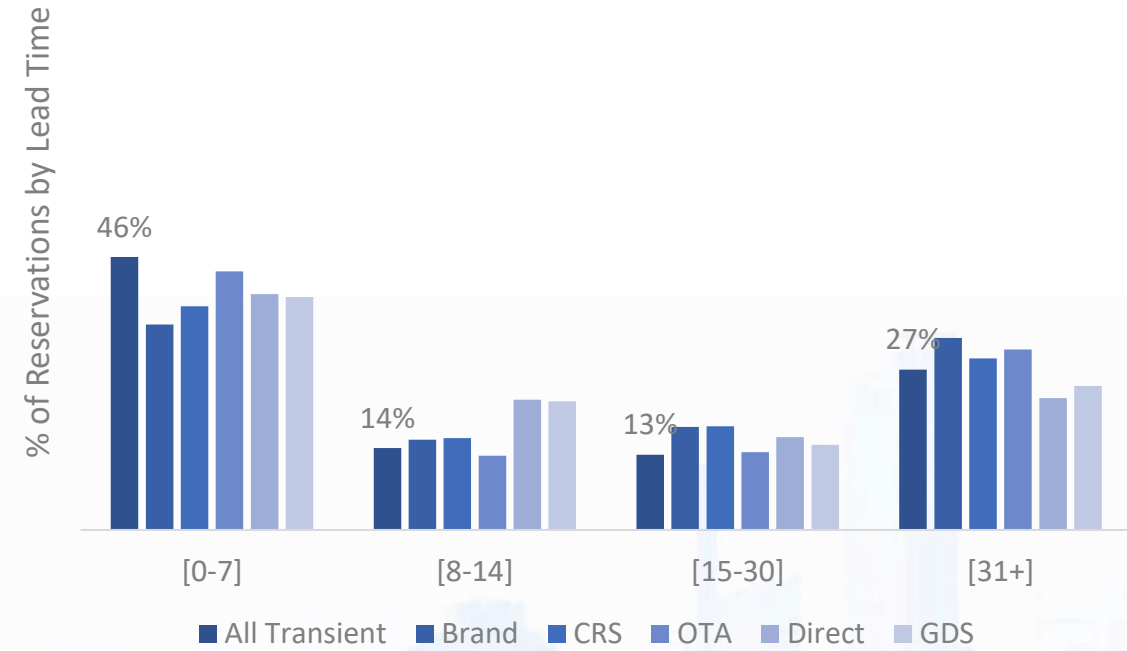
Transient Lead Time by Segment & Channel | Canada

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

Lead Time by Segment



Lead Time by Channel



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Greater China

Airline Year-on-Year Net Reservations | Greater China

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



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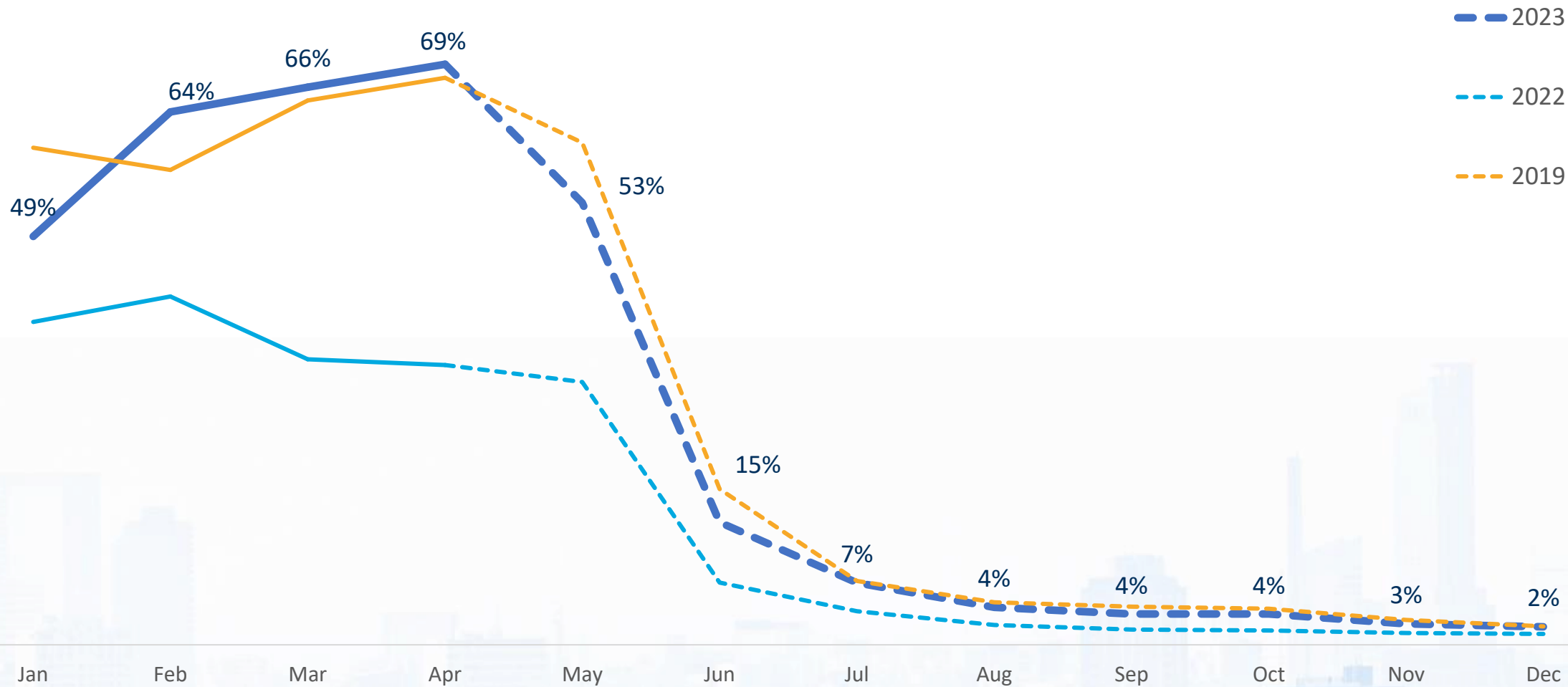
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Monthly Occupancy & Year-on-Year Variance | Greater China

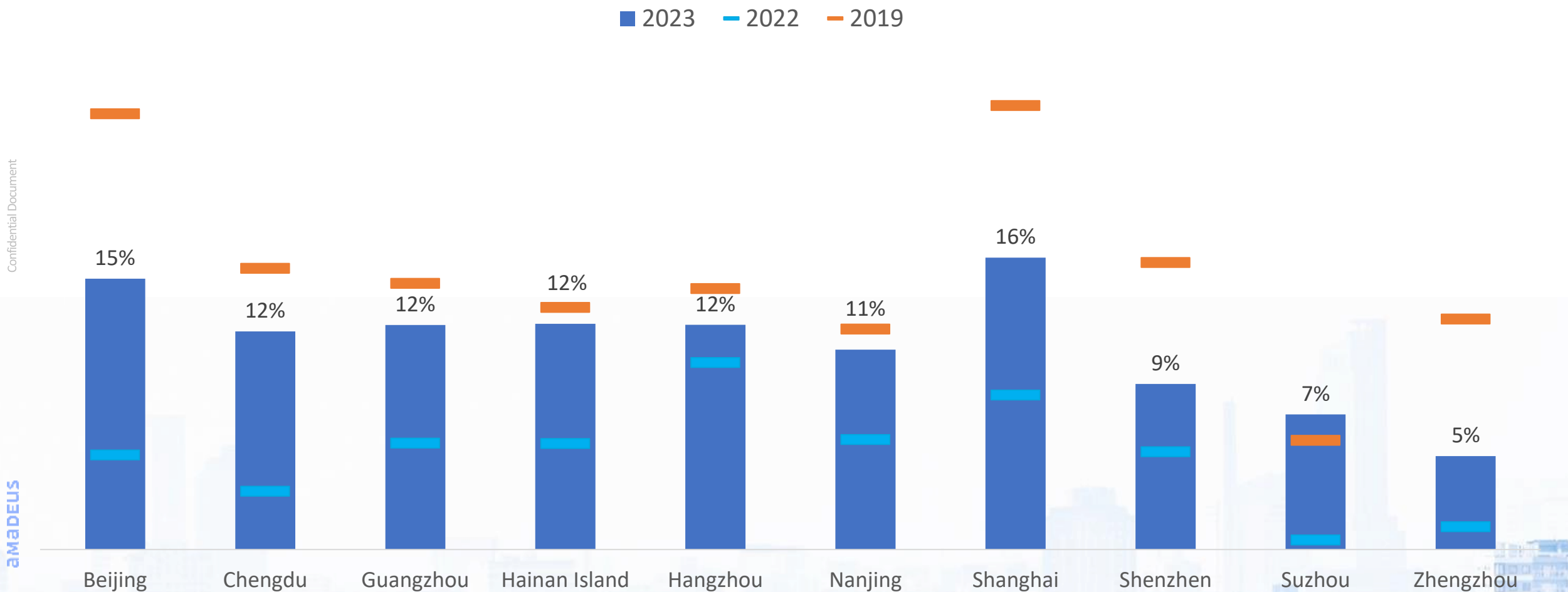
2023 occupancy by month compared to 2022 and 2019.

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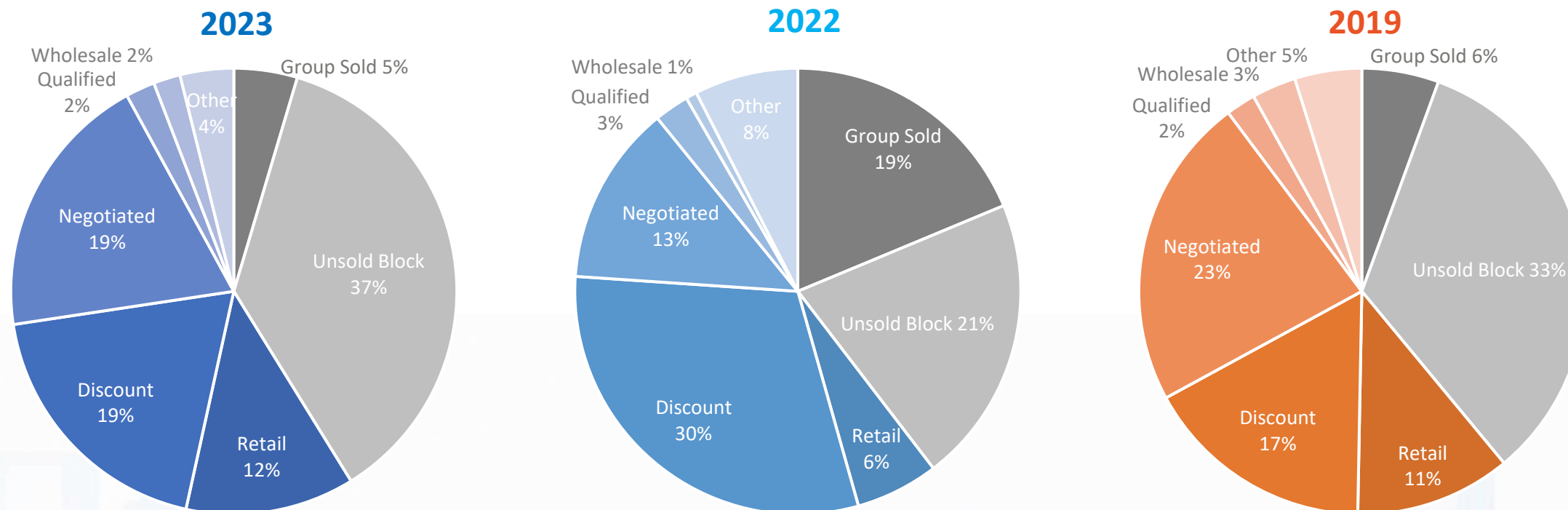
Occupancy & Pace by Market | Greater China

On-the-books total occupancy by market for June 2023 vs. same time last year and in 2019.



Year-on-Year Segmentation | Greater China

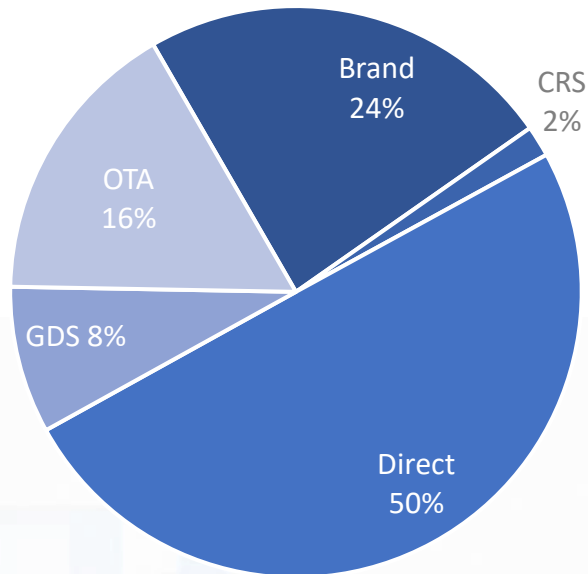
On-the-books market segmentation mix for June 2023 vs. same time last year and in 2019.



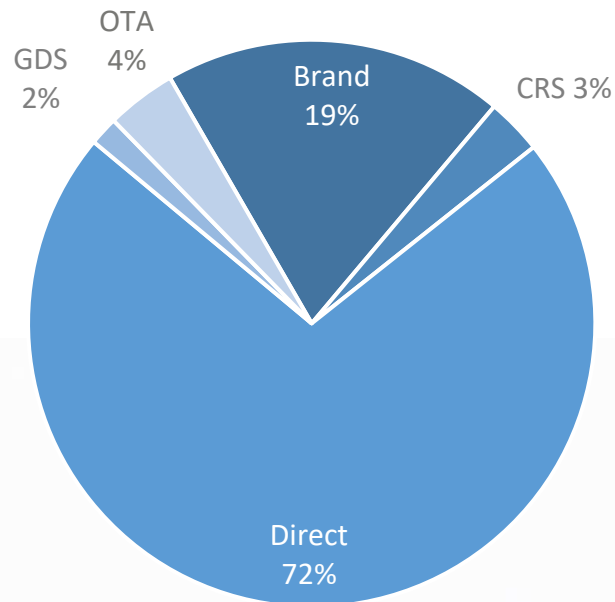
Year-on-Year Channel Mix | Greater China

On-the-books distribution channel mix for June 2023 vs. same time last year and in 2019.

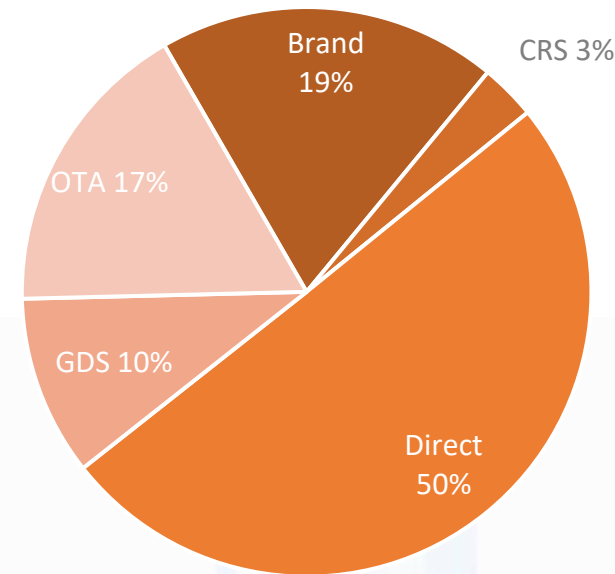
2023



2022



2019



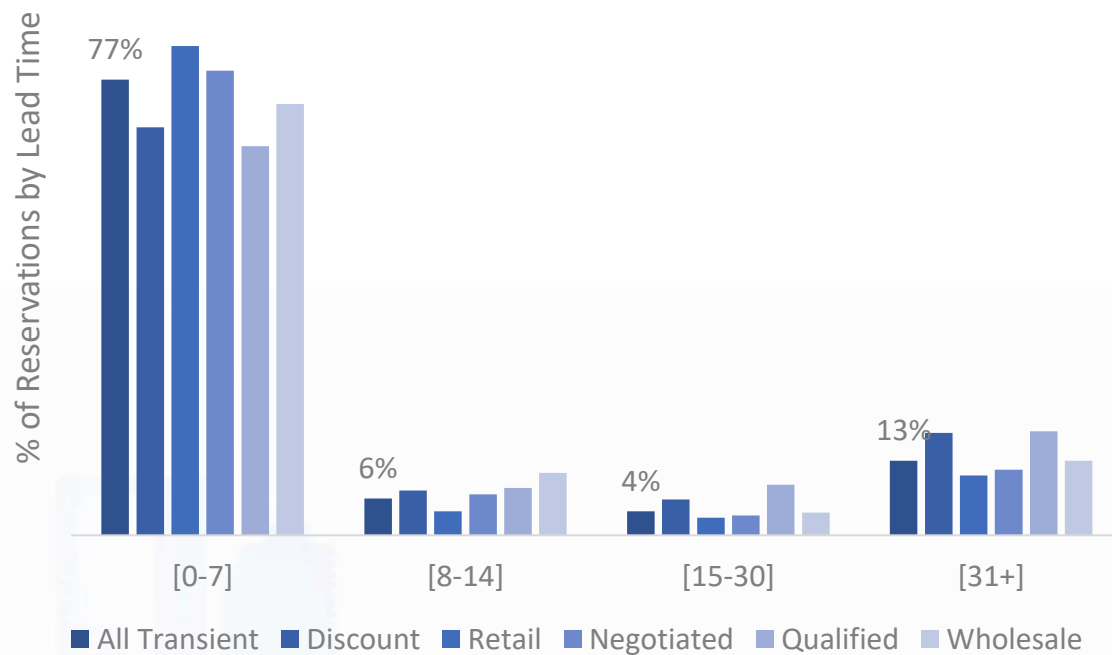
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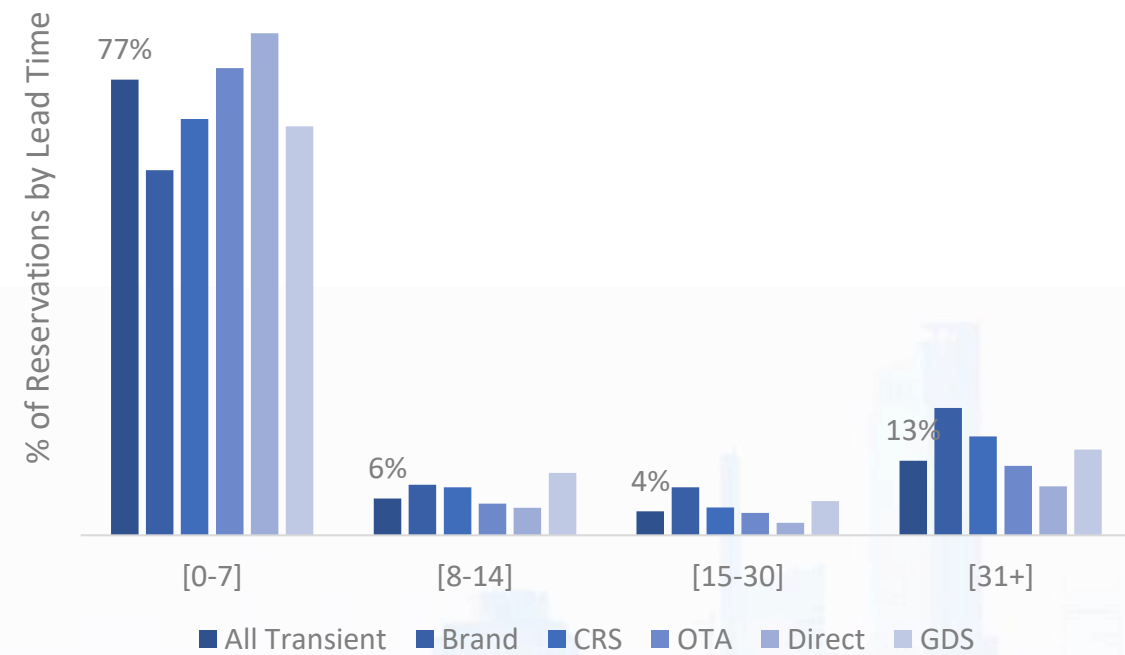
Transient Lead Time by Segment & Channel | Greater China

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

Lead Time by Segment



Lead Time by Channel



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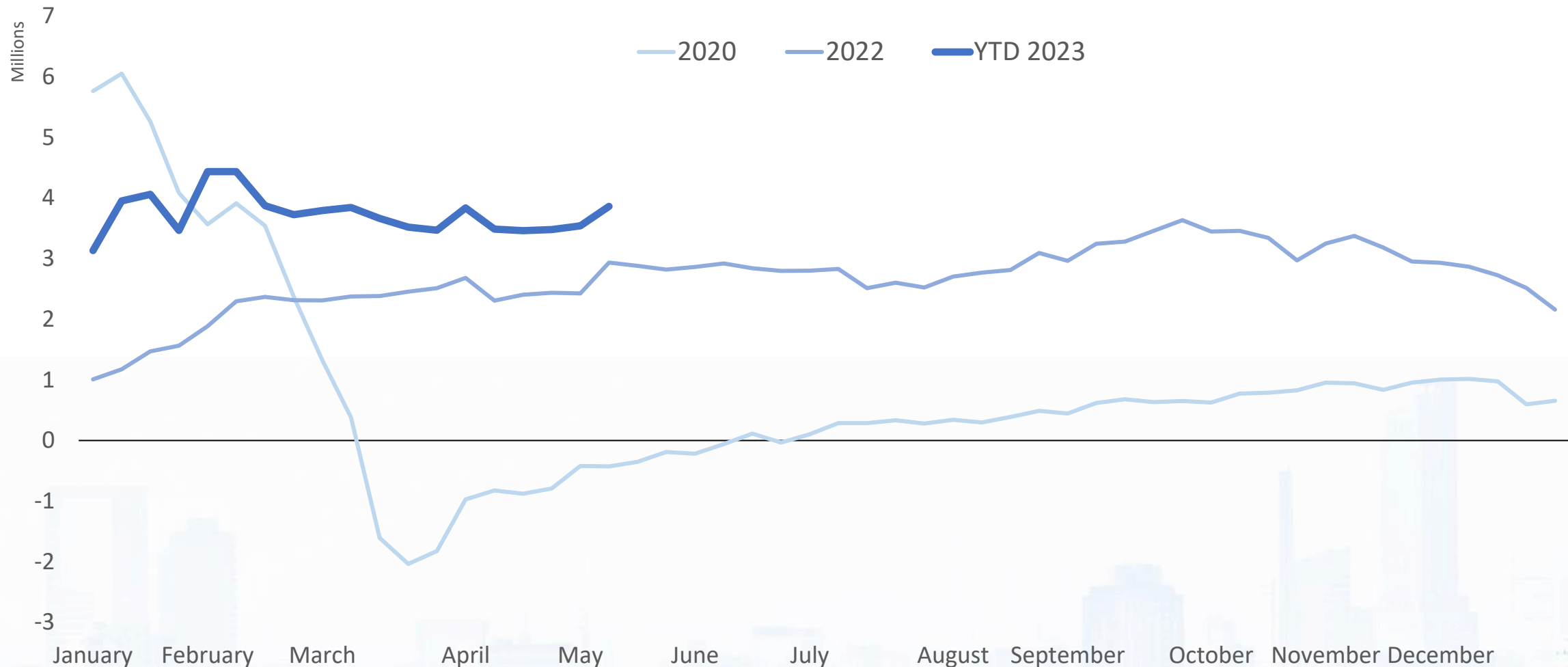
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Rest of Asia Pacific



Airline Year-on-Year Net Reservations | Rest of Asia Pacific

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



Monthly Occupancy & Year-on-Year Variance | Rest of Asia Pacific

2023 occupancy by month compared to 2022 and 2019.

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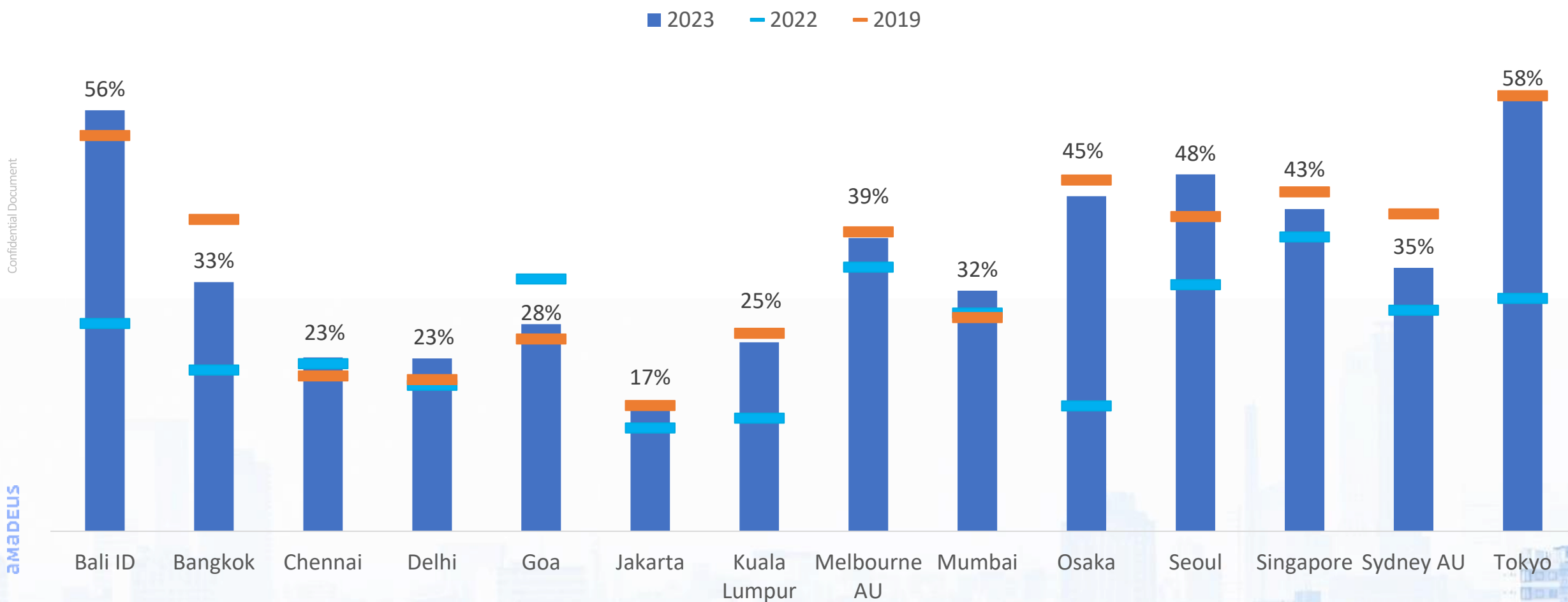
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Source: Amadeus Demand360® data as of May 18, 2023

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Occupancy & Pace by Market | Rest of Asia Pacific

On-the-books total occupancy by market for June 2023 vs. same time last year and in 2019.

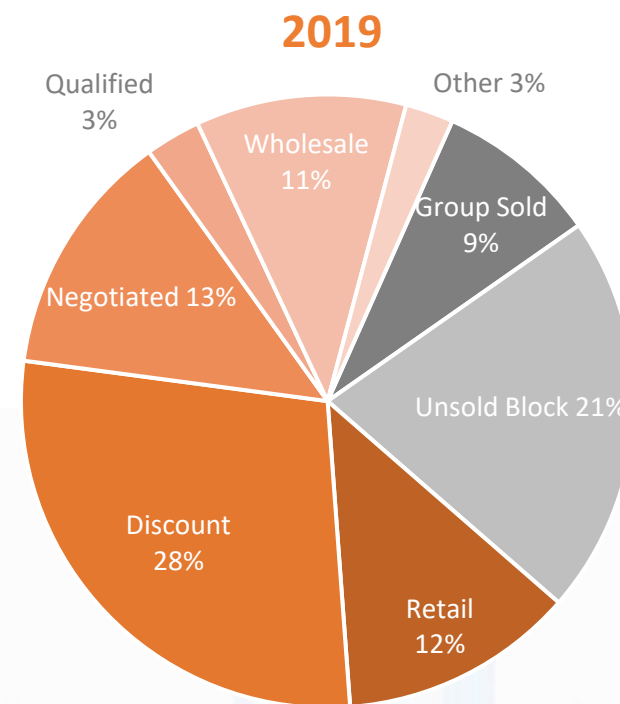
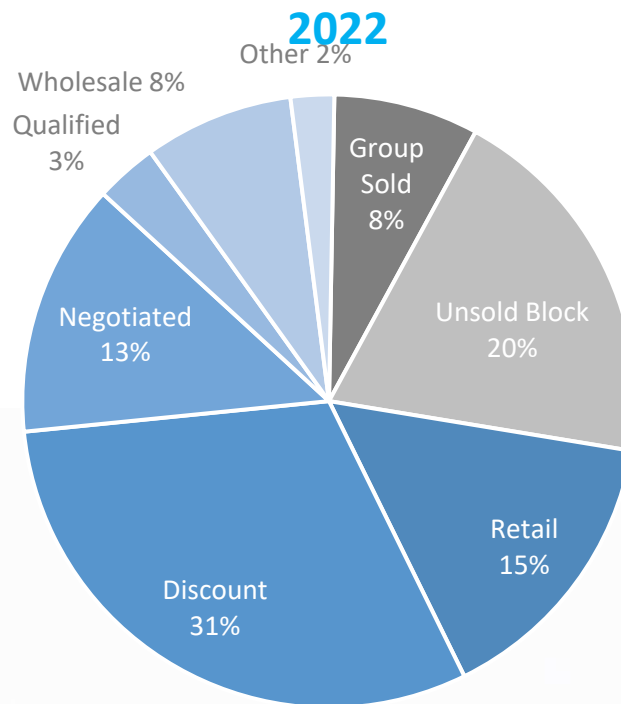
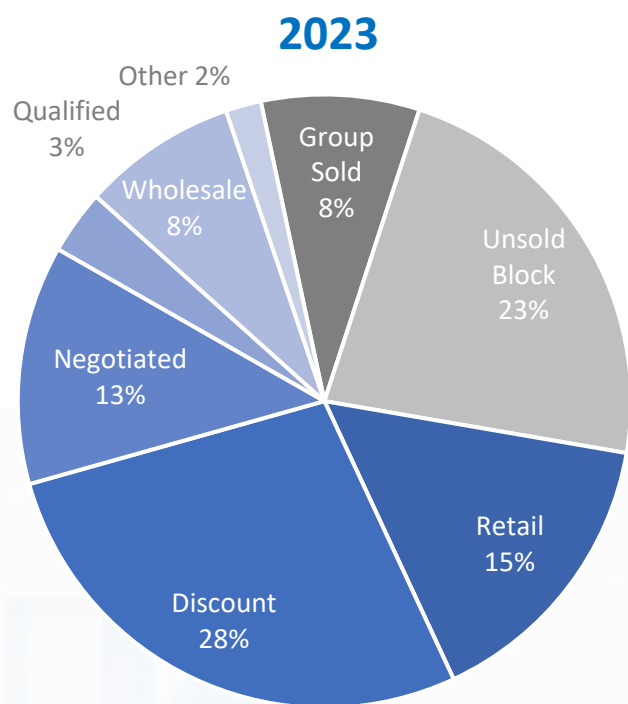


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Year-on-Year Segmentation | Rest of Asia Pacific

On-the-books market segmentation mix for June 2023 vs. same time last year and in 2019.

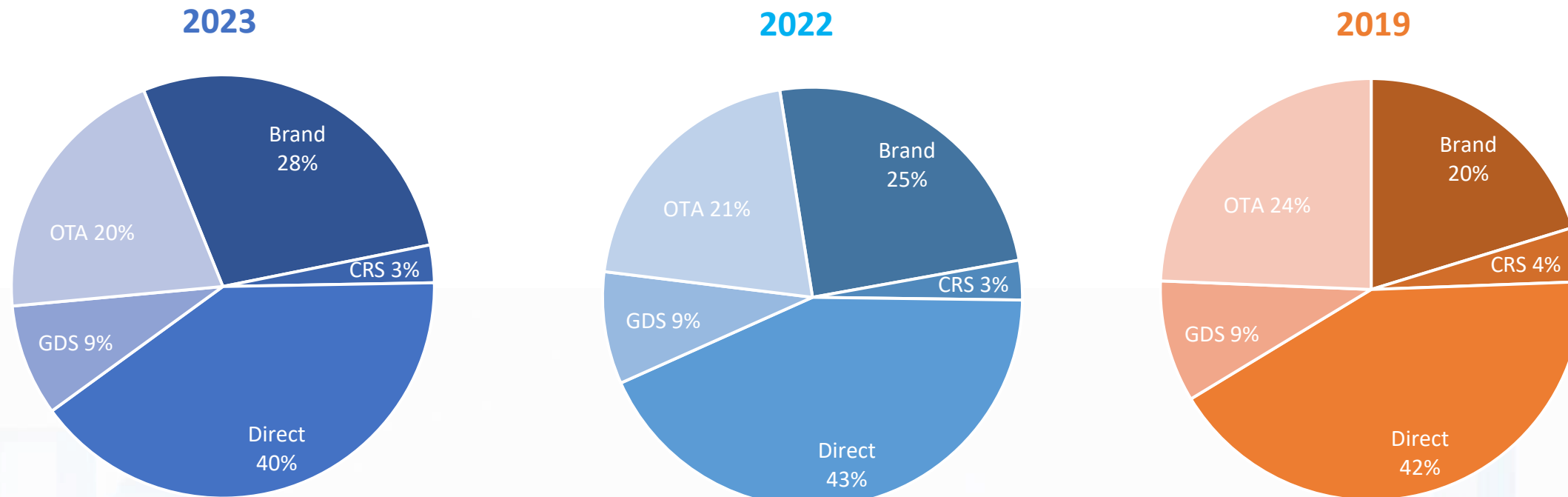


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Year-on-Year Channel Mix | Rest of Asia Pacific

On-the-books distribution channel mix for June 2023 vs. same time last year and in 2019.



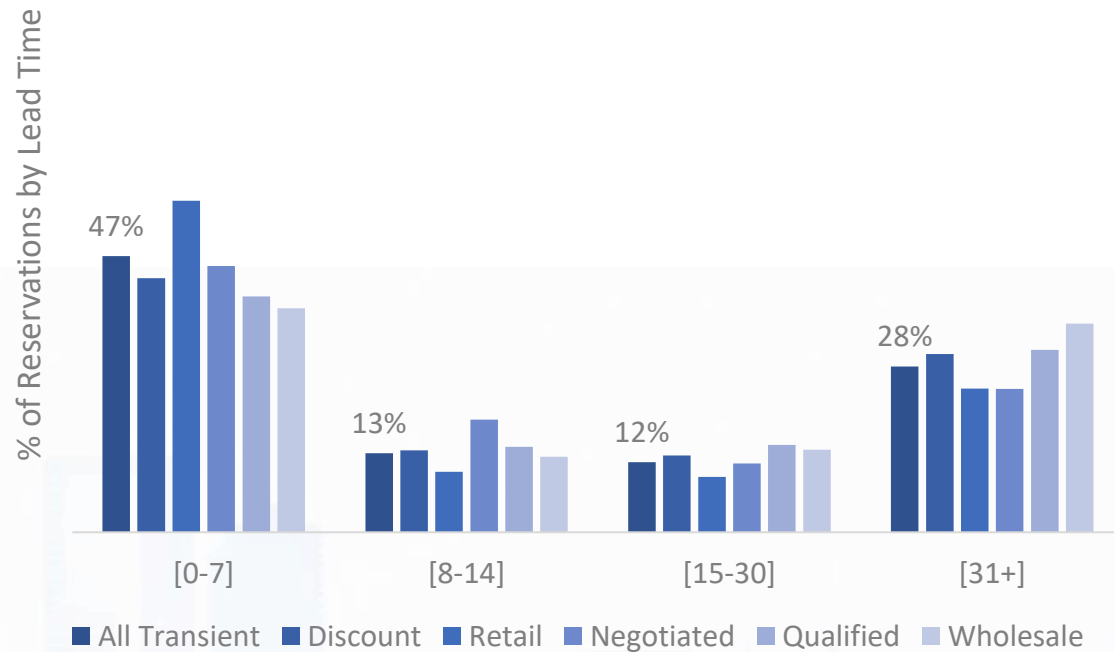
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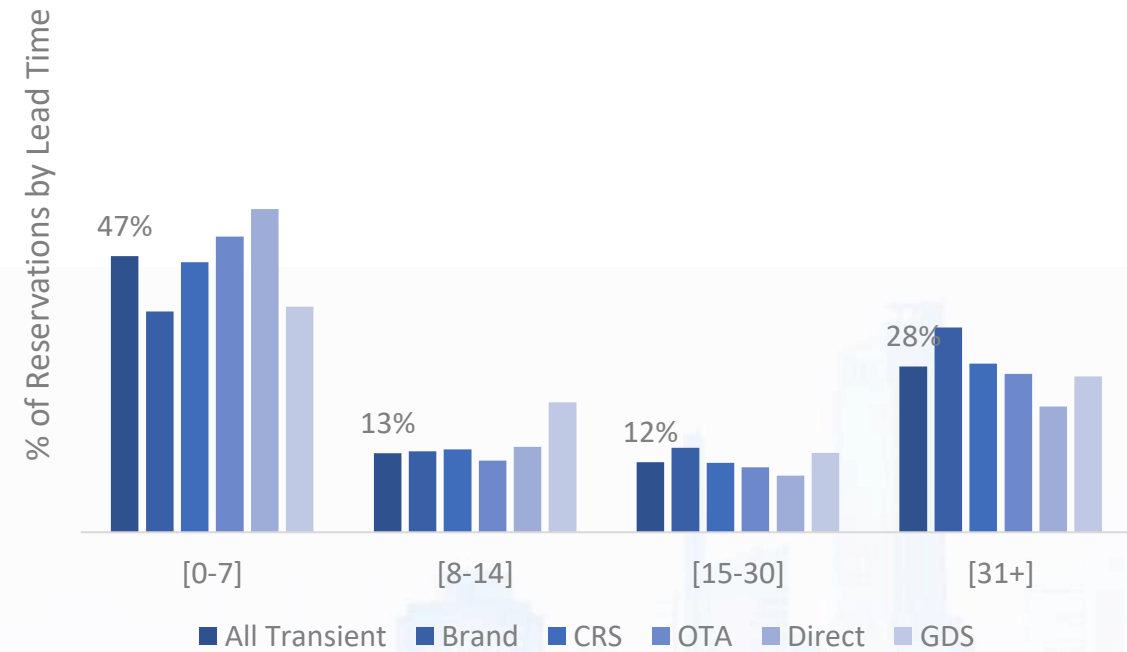
Transient Lead Time by Segment & Channel | Rest of Asia Pacific

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

Lead Time by Segment



Lead Time by Channel



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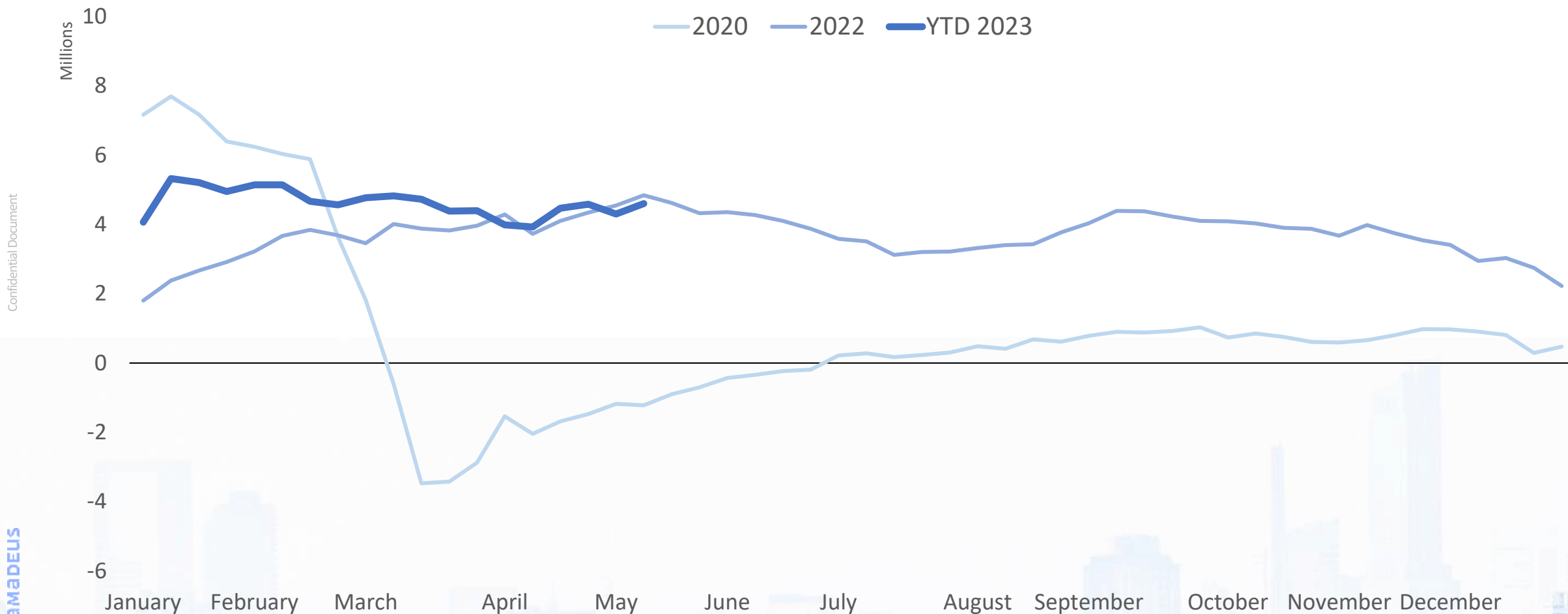
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Europe

Airline Year-on-Year Net Reservations | Europe

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



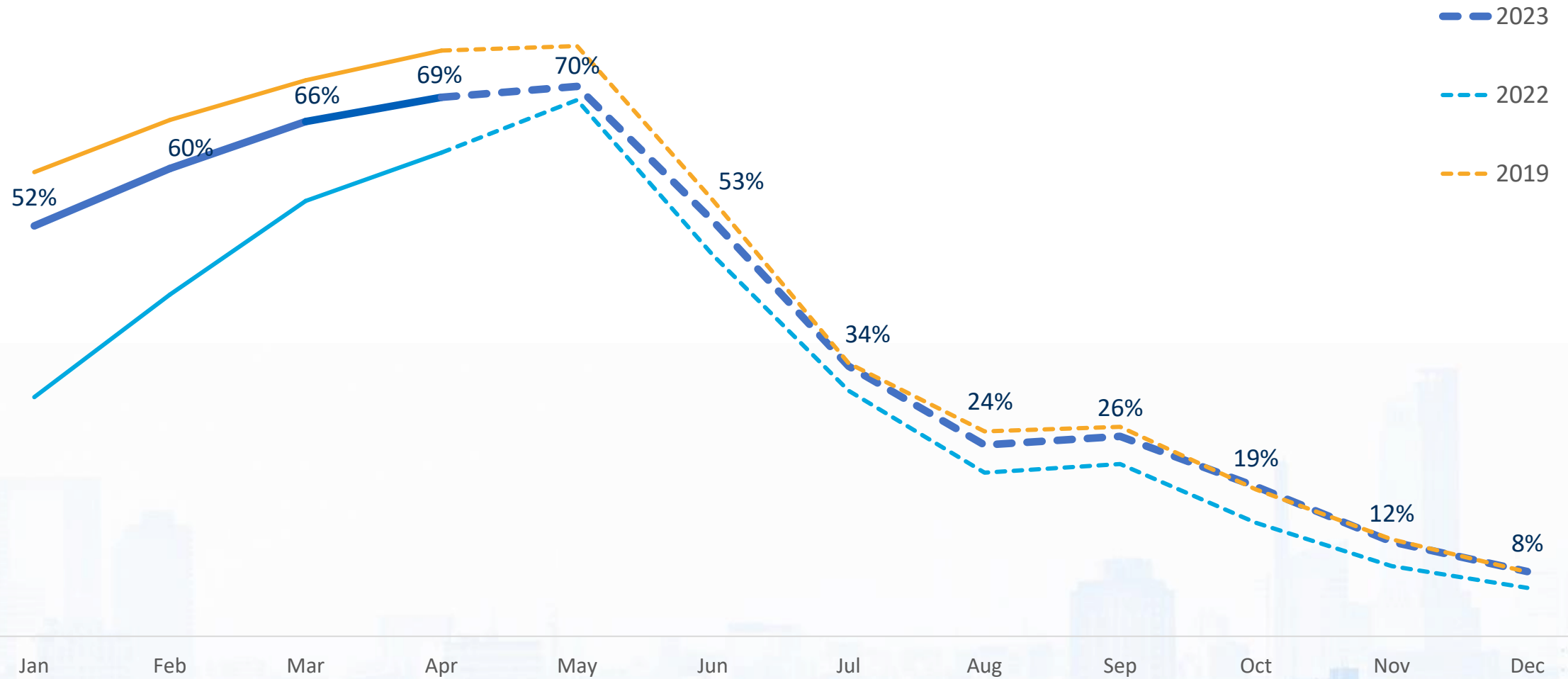
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Monthly Occupancy & Year-on-Year Variance | Europe

2023 occupancy by month compared to 2022 and 2019.

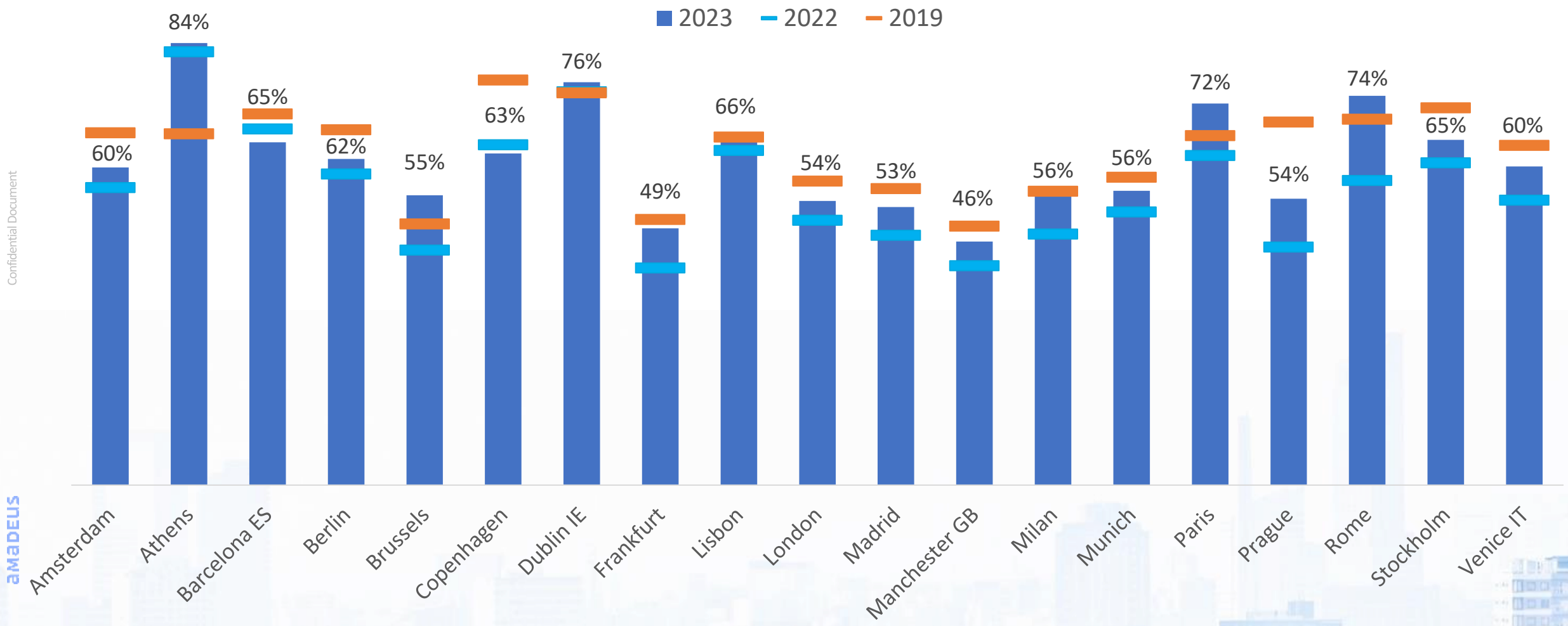
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Occupancy & Pace by Market | Europe

On-the-books total occupancy by market for June 2023 vs. same time last year and in 2019.

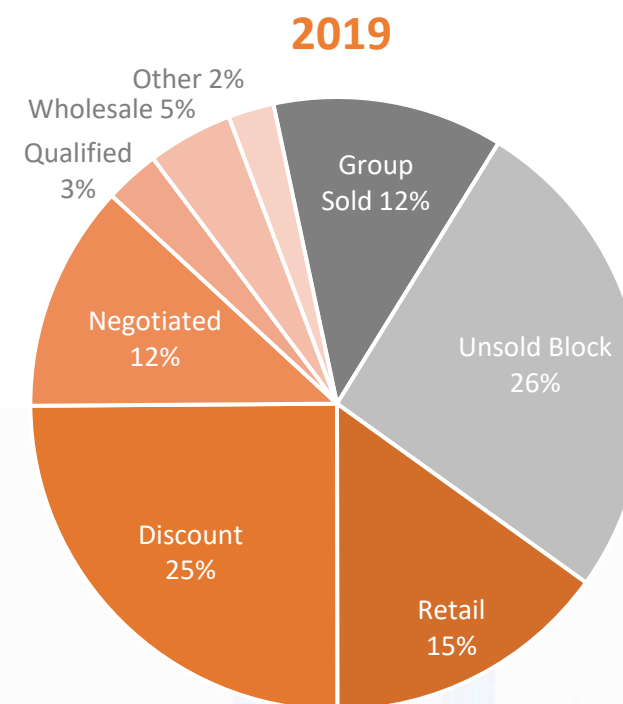
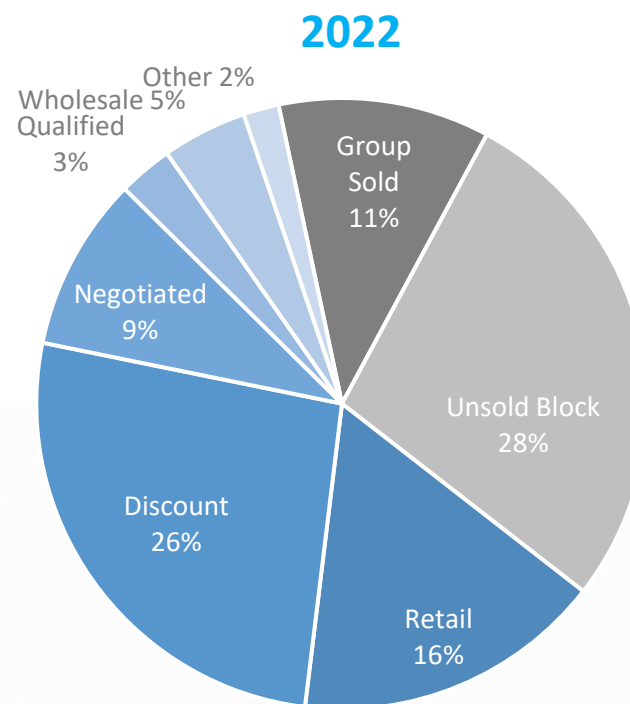
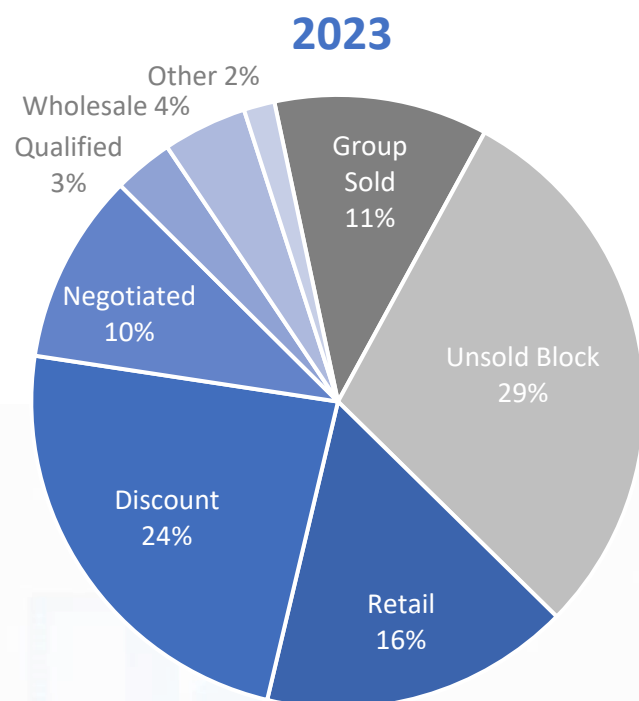


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Year-on-Year Segmentation | Europe

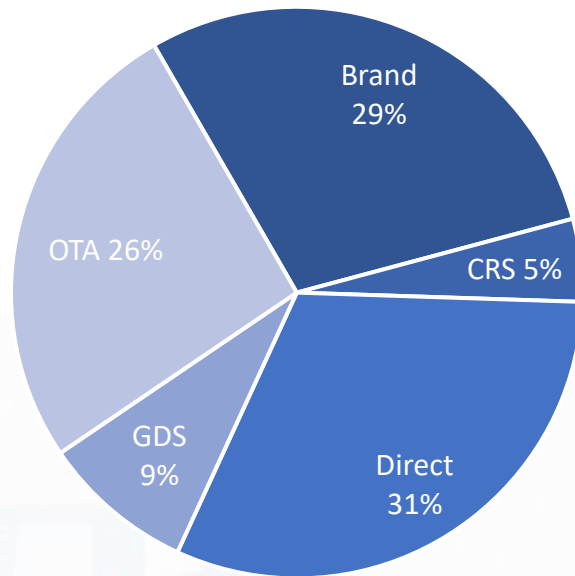
On-the-books market segmentation mix for June 2023 vs. same time last year and in 2019.



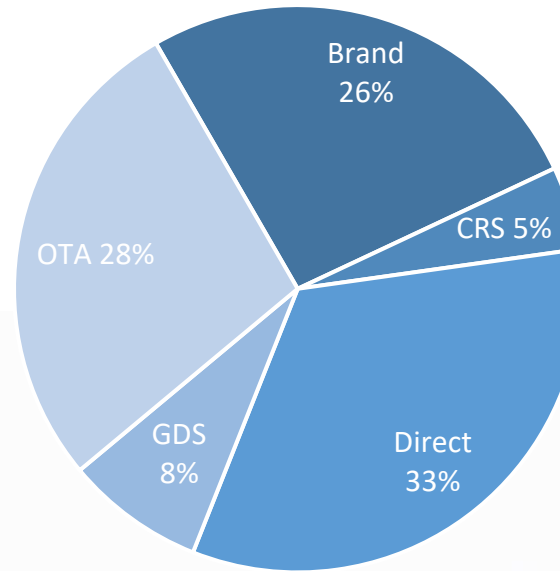
Year-on-Year Channel Mix | Europe

On-the-books distribution channel mix for June 2023 vs. same time last year and in 2019.

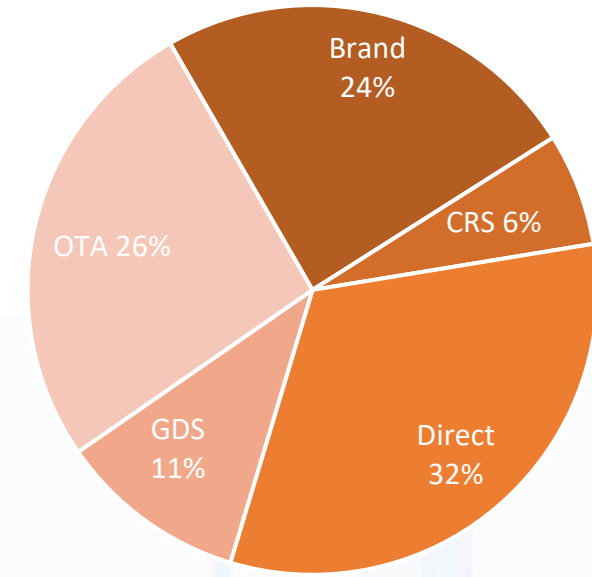
2023



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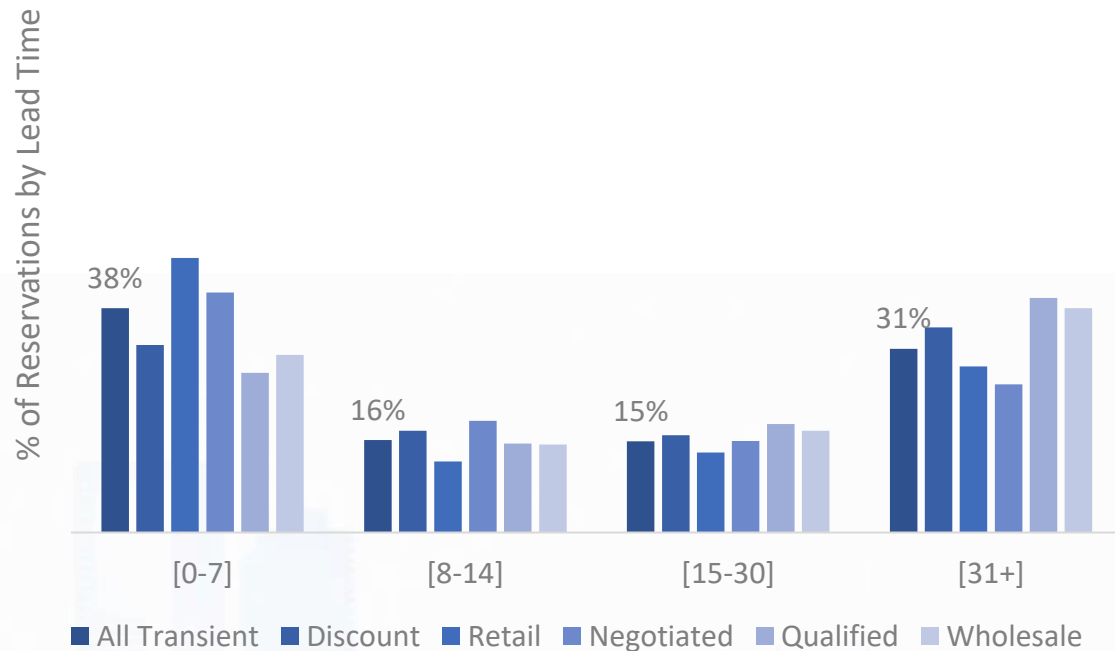
2019



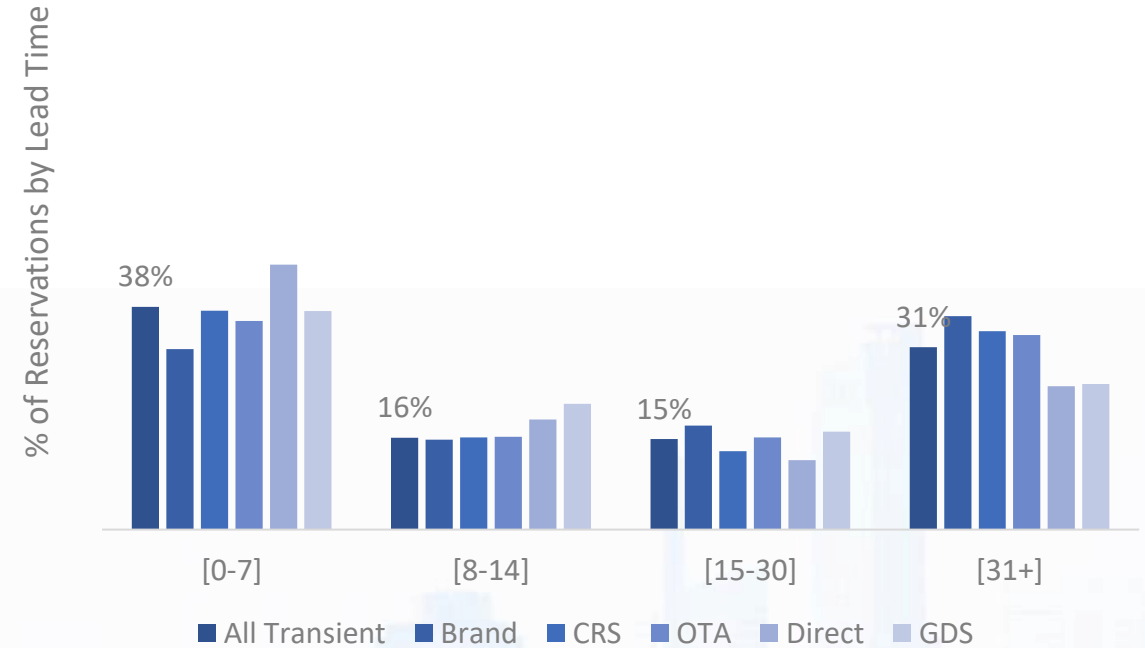
Transient Lead Time by Segment & Channel | Europe

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



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Middle East & Africa



Airline Year-on-Year Net Reservations | Middle East & Africa

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

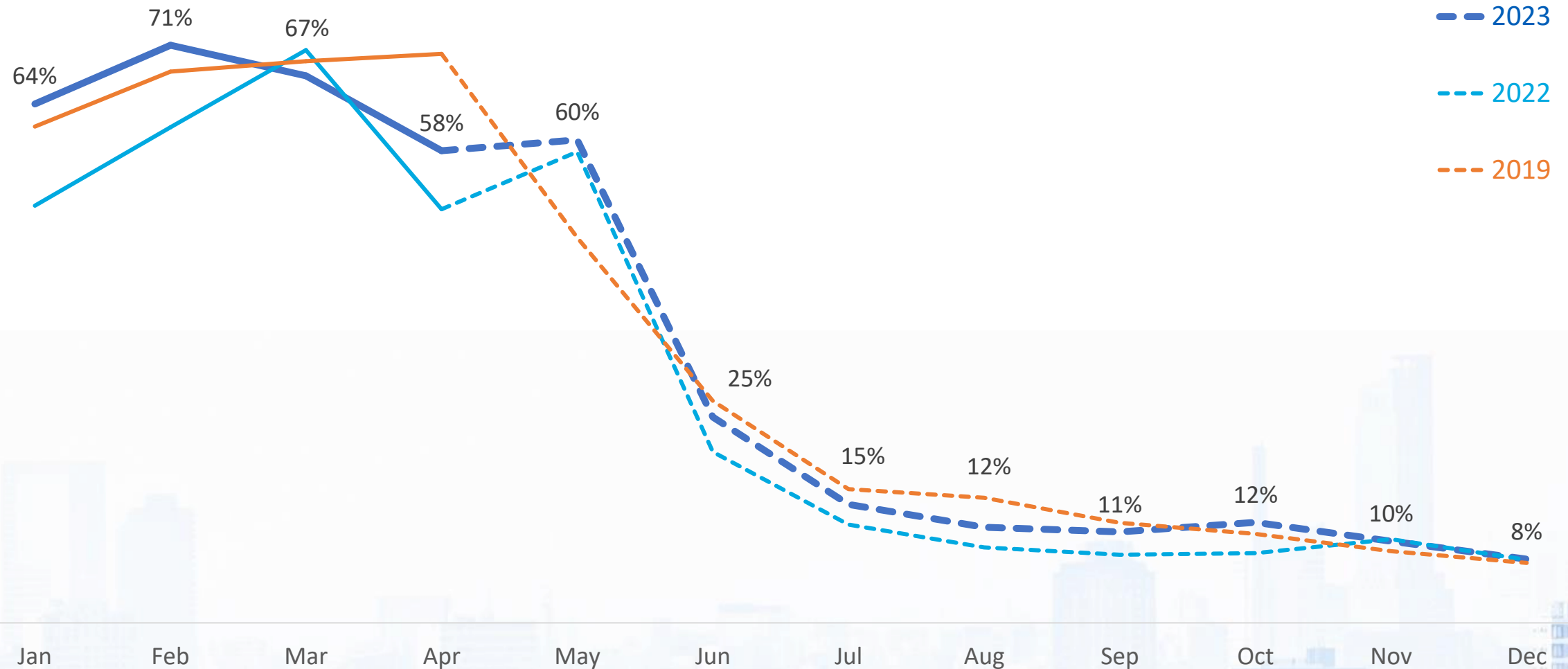


Source: Amadeus GDS Airline Booking Data (MIDT) data as of May 18, 2023

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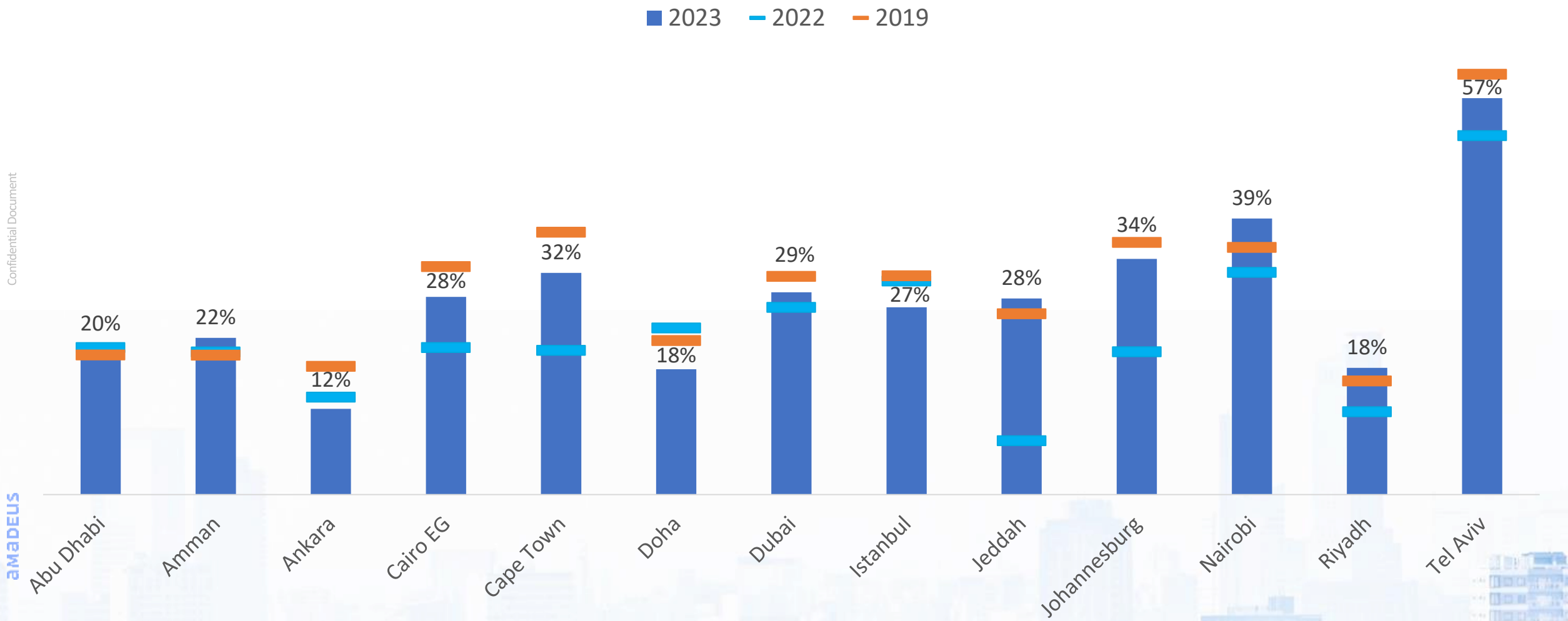
Monthly Occupancy & Year-on-Year Variance | Middle East & Africa

2023 occupancy by month compared to 2022 and 2019.



Occupancy & Pace by Market | Middle East & Africa

On-the-books total occupancy by market for June 2023 vs. same time last year and in 2019.



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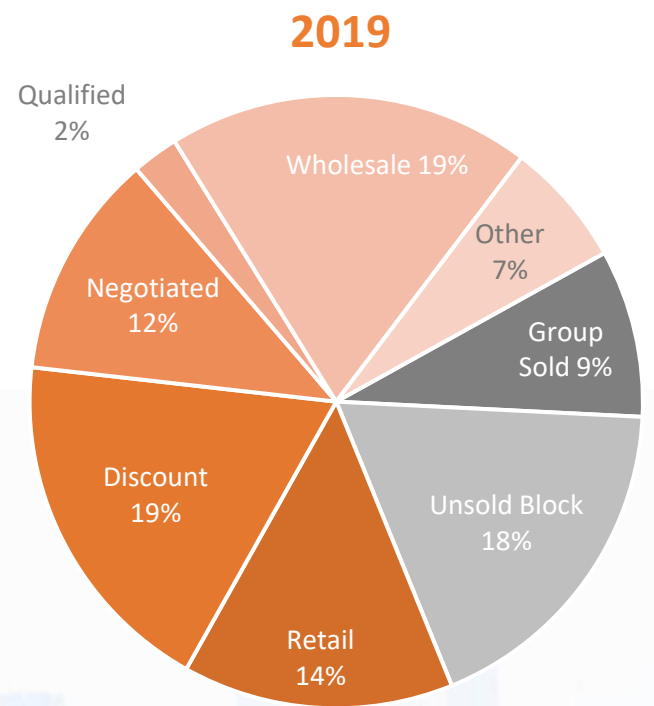
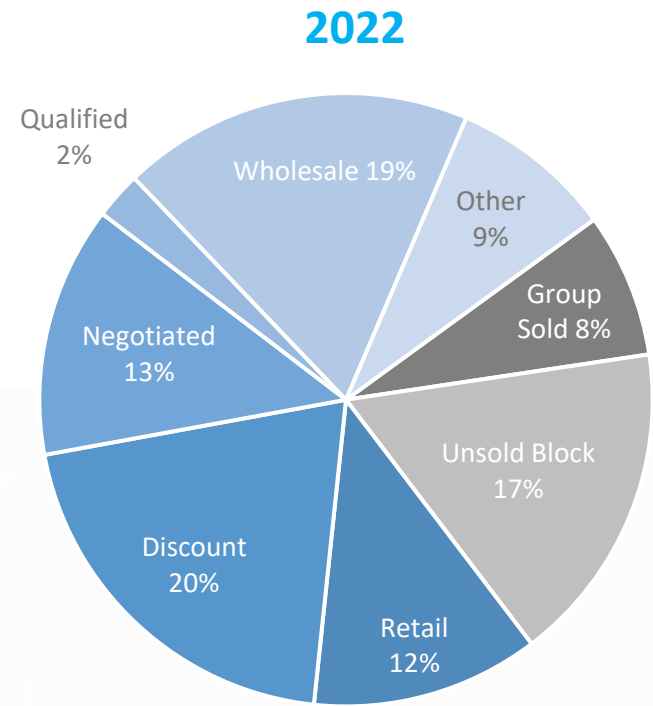
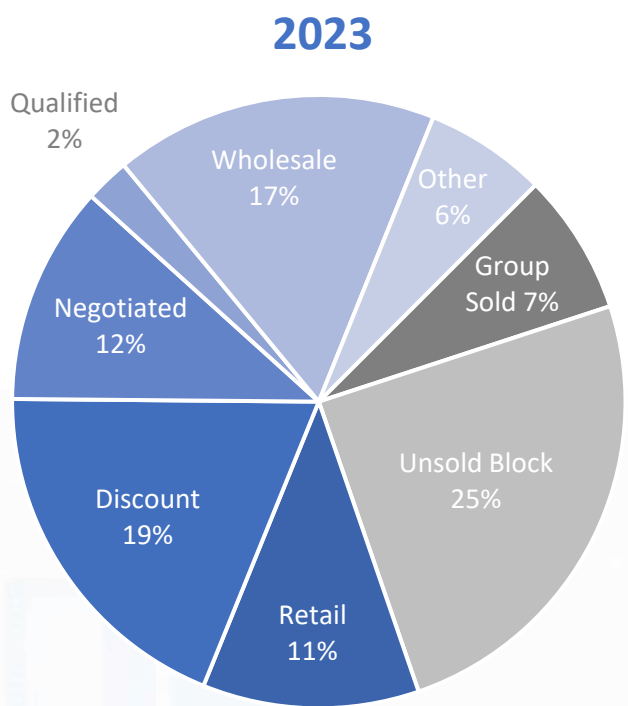
Source: Amadeus Demand360® data as of May 18, 2023

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Year-on-Year Segmentation | Middle East & Africa

On-the-books market segmentation mix for June 2023 vs. same time last year and in 2019.

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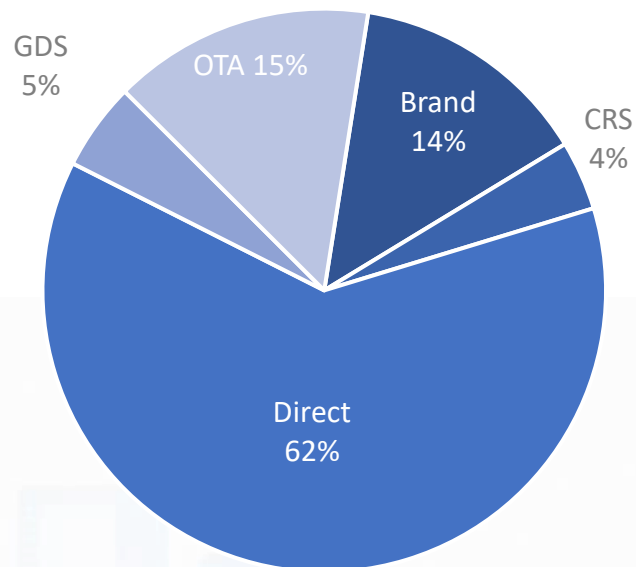


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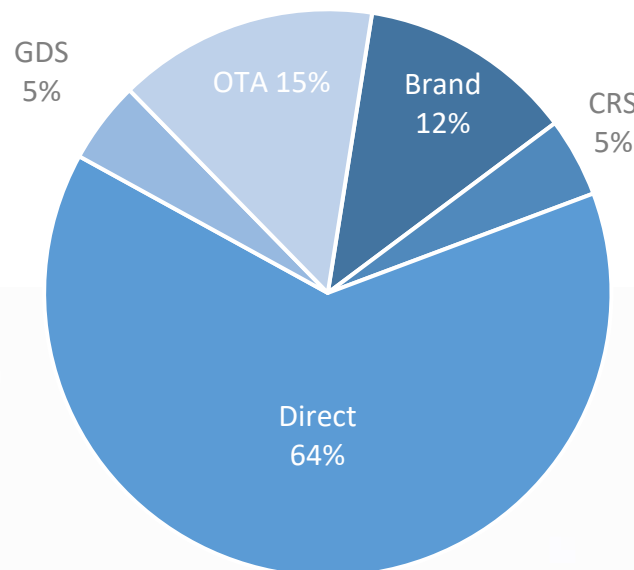
Year-on-Year Channel Mix | Middle East & Africa

On-the-books distribution channel mix for June 2023 vs. same time last year and in 2019.

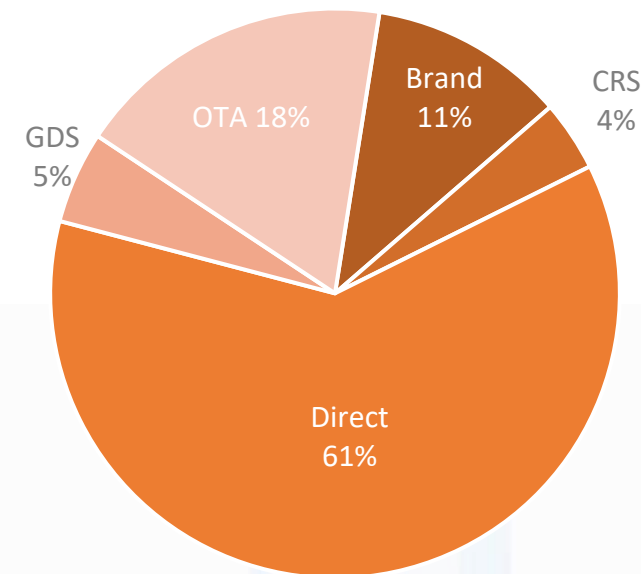
2023



2022



2019



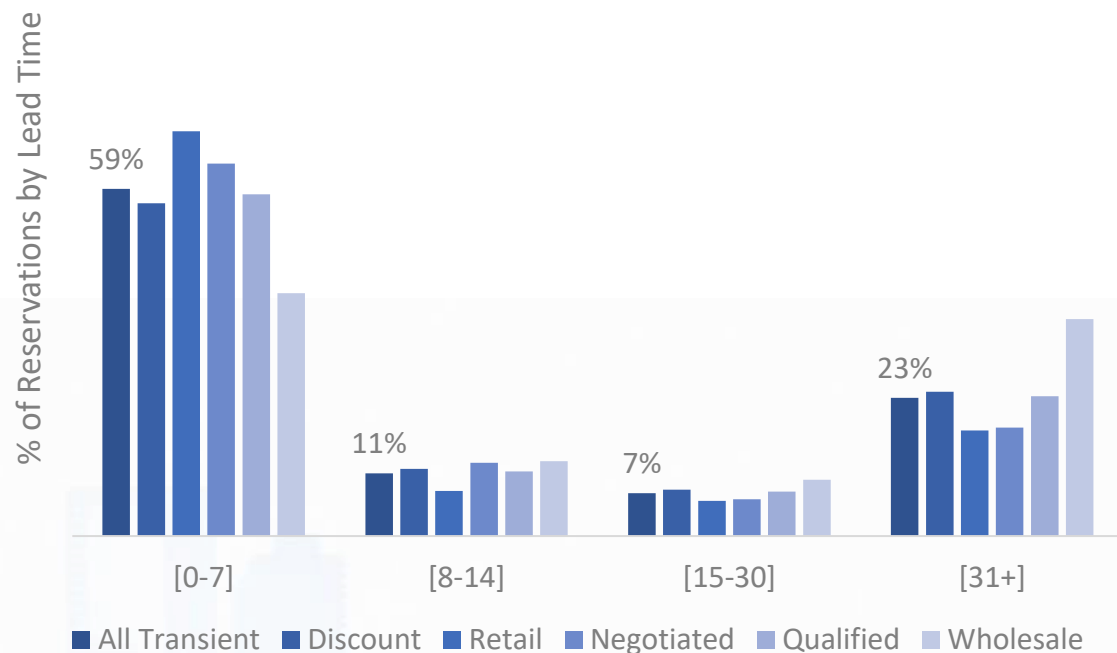
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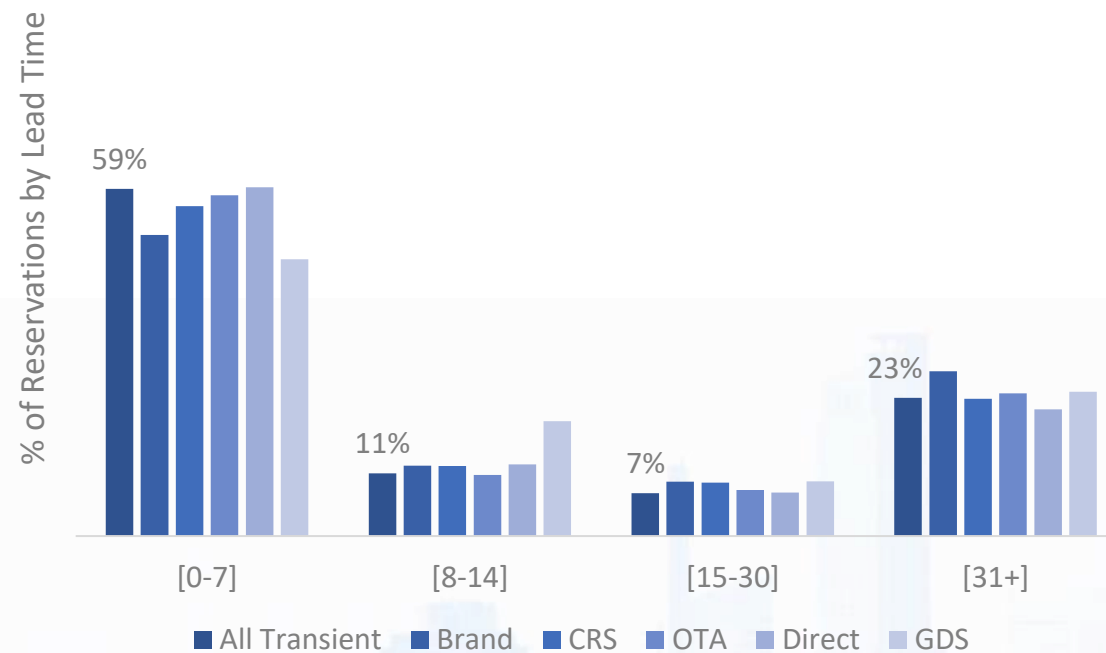
Transient Lead Time by Segment & Channel | Middle East & Africa

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

Lead Time by Segment



Lead Time by Channel



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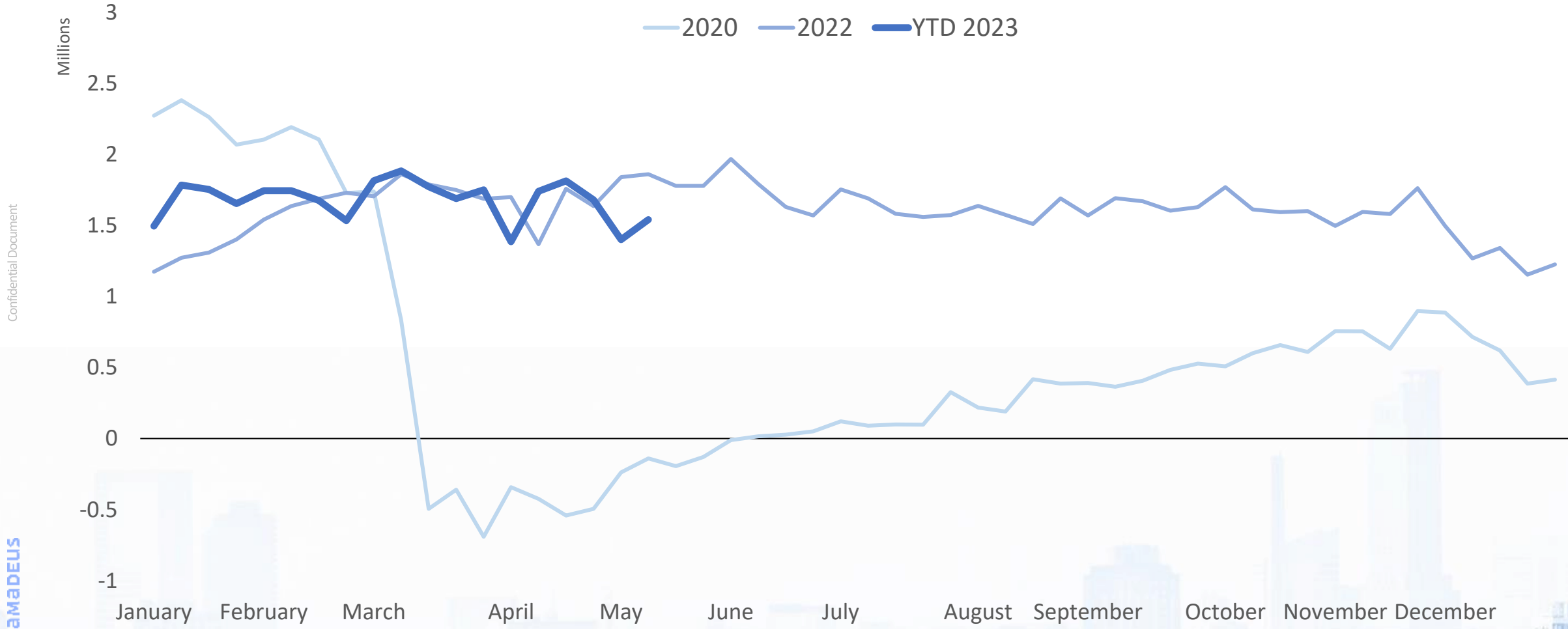
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Latin America

Airline Year-on-Year Net Reservations | Latin America

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

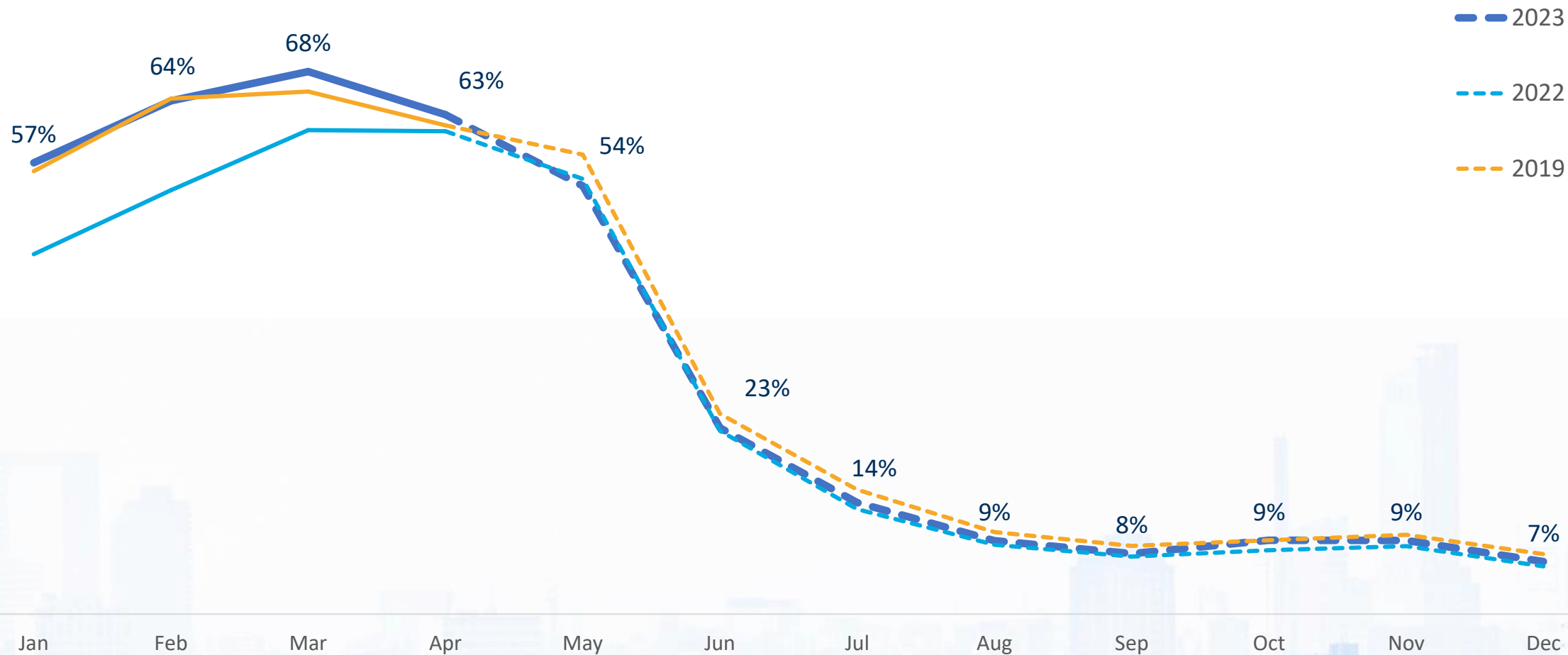


Source: Amadeus GDS Airline Booking Data (MIDT) data as of May 18, 2023

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Monthly Occupancy & Year-on-Year Variance | Latin America

2023 occupancy by month compared to 2022 and 2019.

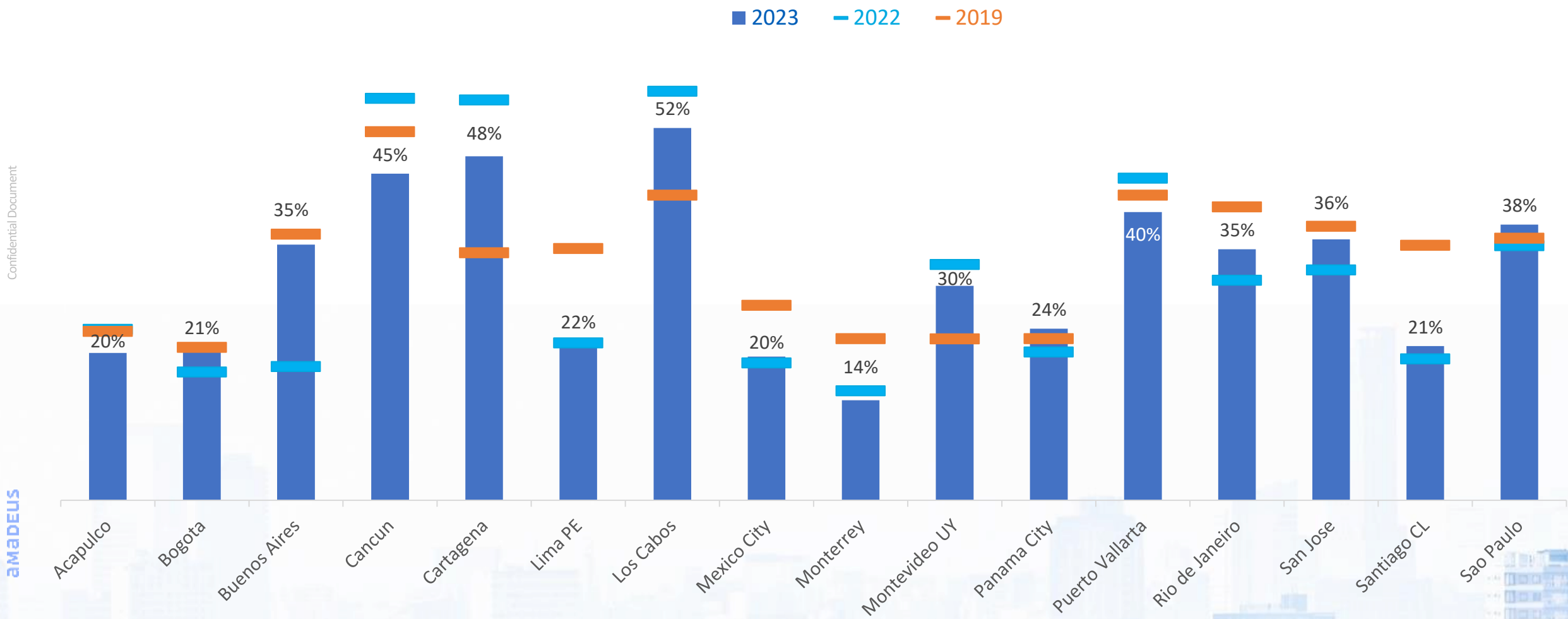


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Occupancy & Pace by Market | Latin America

On-the-books total occupancy by market for June 2023 vs. same time last year and in 2019.



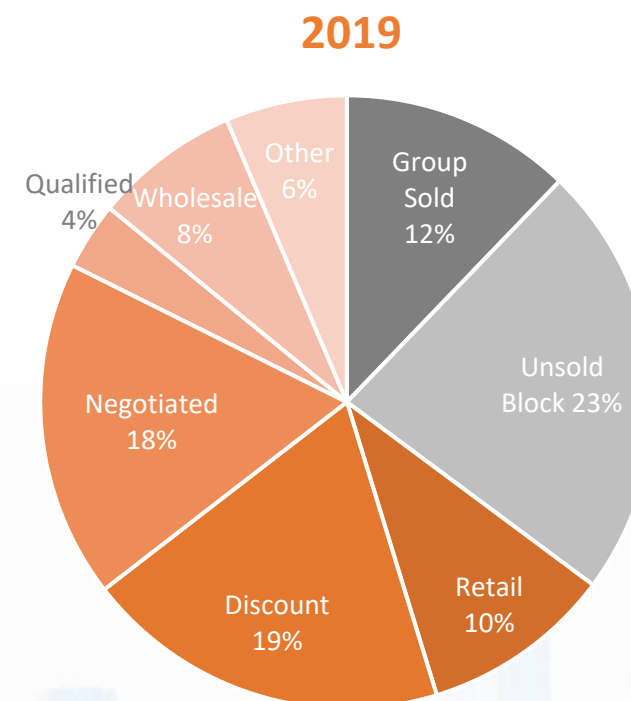
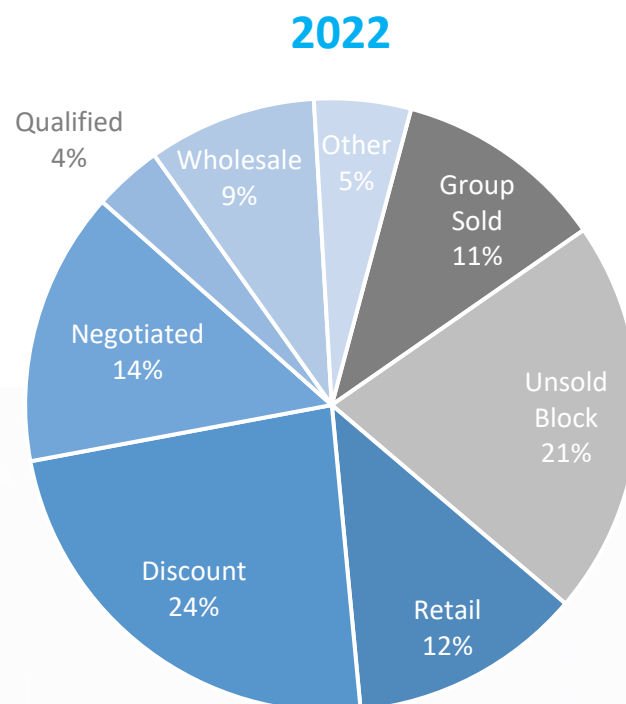
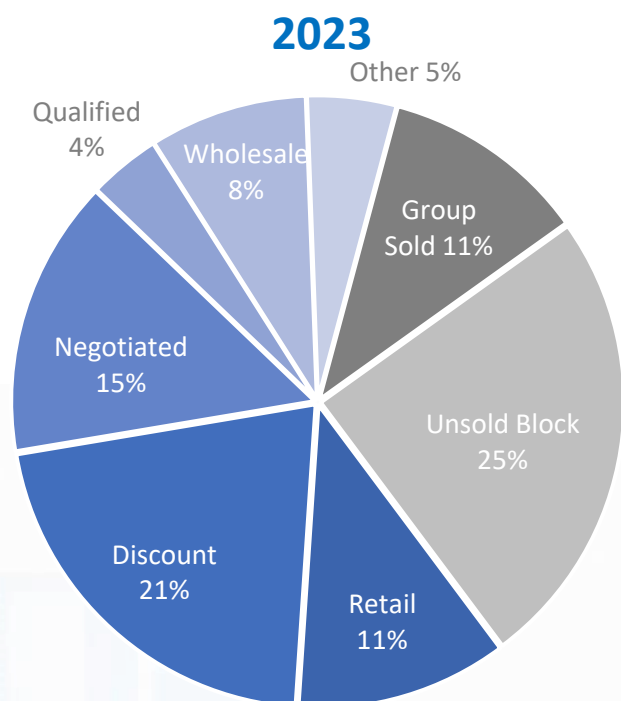
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Year-on-Year Segmentation | Latin America

On-the-books market segmentation mix for June 2023 vs. same time last year and in 2019.

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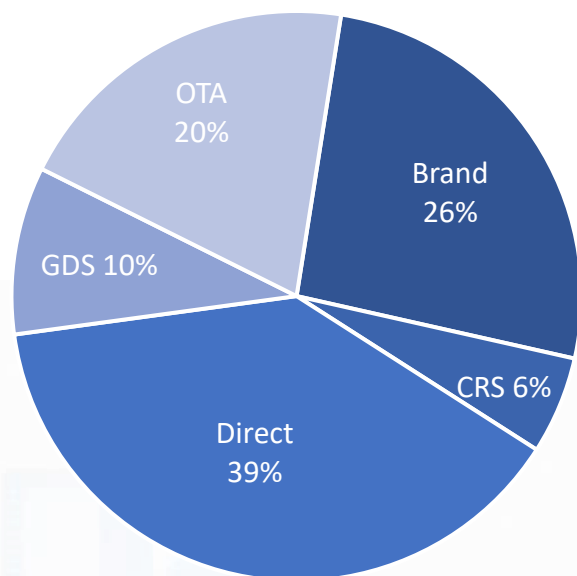


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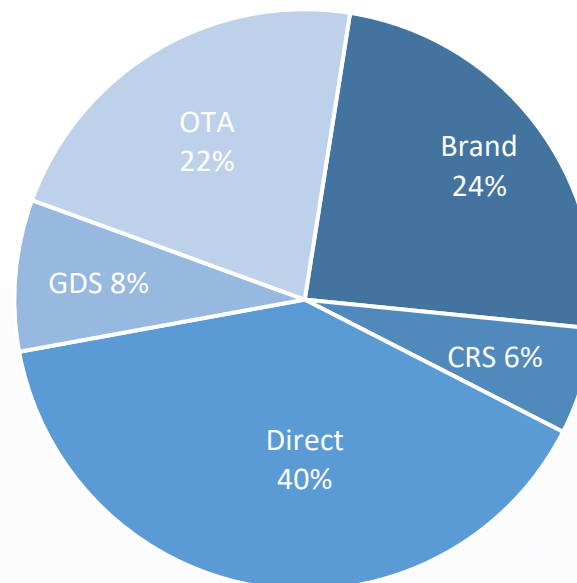
Year-on-Year Channel Mix | Latin America

On-the-books distribution channel mix for June 2023 vs. same time last year and in 2019.

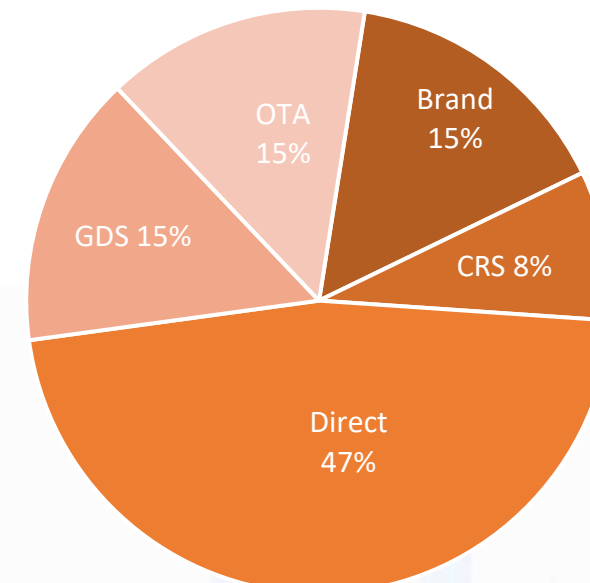
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2022



2019



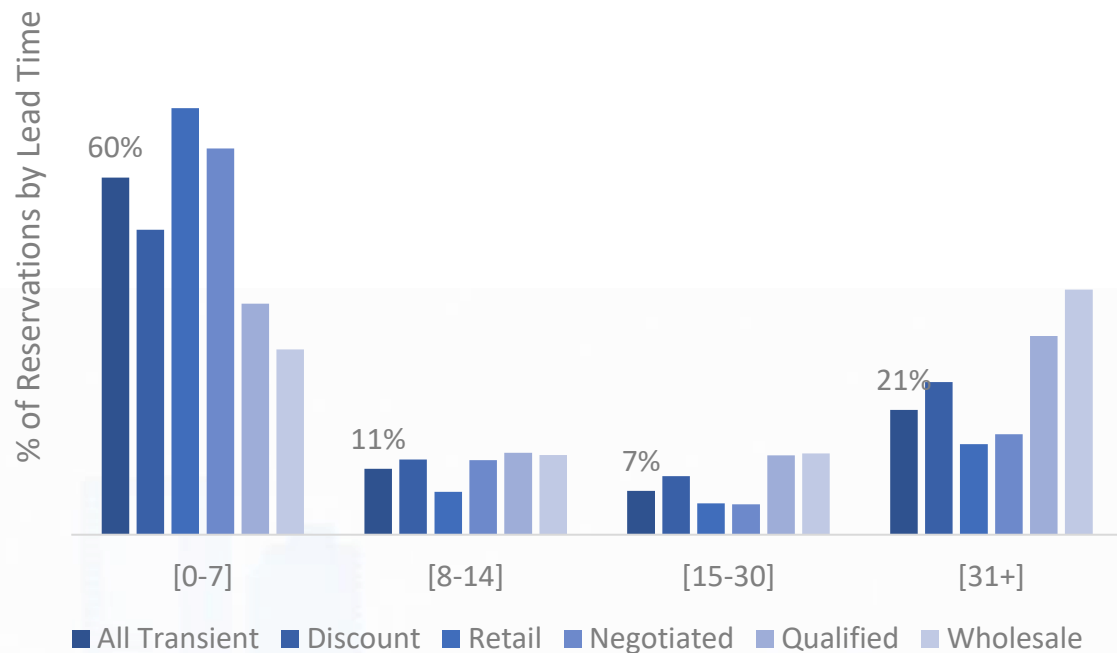
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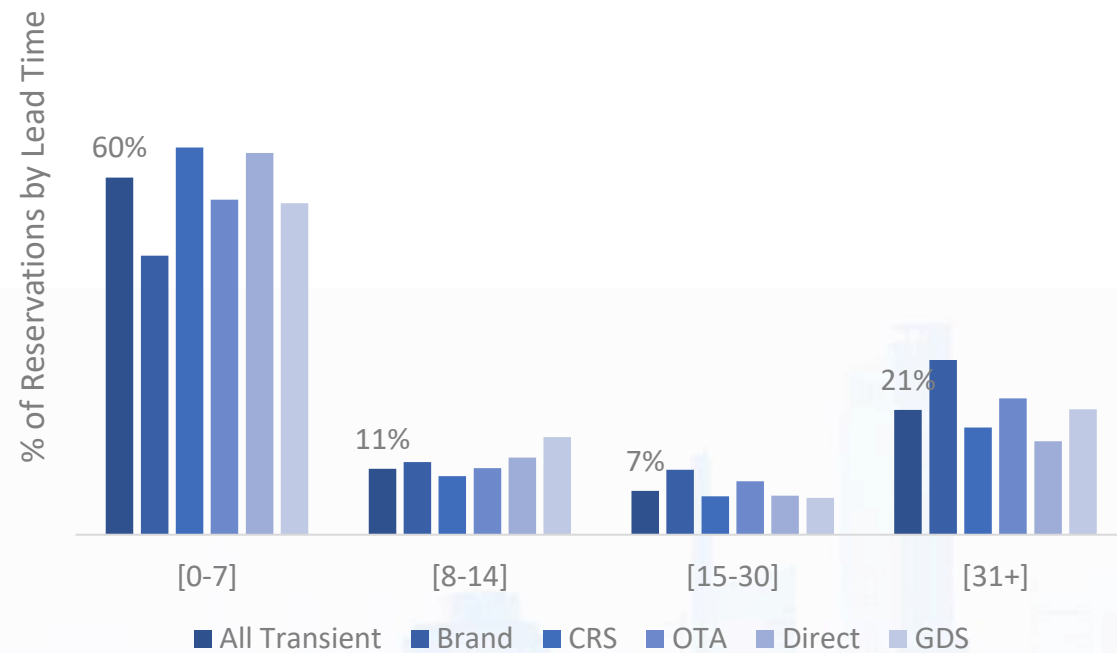
Transient Lead Time by Segment & Channel | Latin America

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

Lead Time by Segment



Lead Time by Channel



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