

# Hospitality Market Insights Report

August

**RENEW**  
TRAVEL WITH US

# Executive Summary

US hotel bookings in August are matching performance for the same time in 2019, and 6.1 points ahead of 2019 for Canada. Both countries have reached pre-pandemic occupancy levels for the remainder of the year. US negotiated room nights trail 2019 by -19% for August, while Canada's negotiated segment is only -9%.

Softened COVID-19 restrictions in China has contributed to a positive turn in occupancy since June, with a strong pick up in July. Interestingly, lead time is slowly shifting with an increase in bookings beyond the month of arrival. Occupancy for the rest of Asia continues to grow month over month. Brand channels still have larger shares of bookings than in 2019, with Negotiated reaching the same share of business.

In Europe, both airline and hotel reservations have declined over the last few weeks while maintaining high levels of occupancy towards the end of the summer, only few points below 2019 levels.

The Middle East matched 2019 levels in July after the last few months paced above 2019. Brand and OTAs are gaining share to Direct, yet it is still the most prominent channel. Here, Tel Aviv and Istanbul are the leading markets towards the end of the summer.

Latin America is also seeing a decline in airline and hotel reservations into the future, likely affecting July and August (although pace against 2019 is very close). Like in the Middle East, Brand and OTAs are gaining share against Direct, which is still the largest channel.

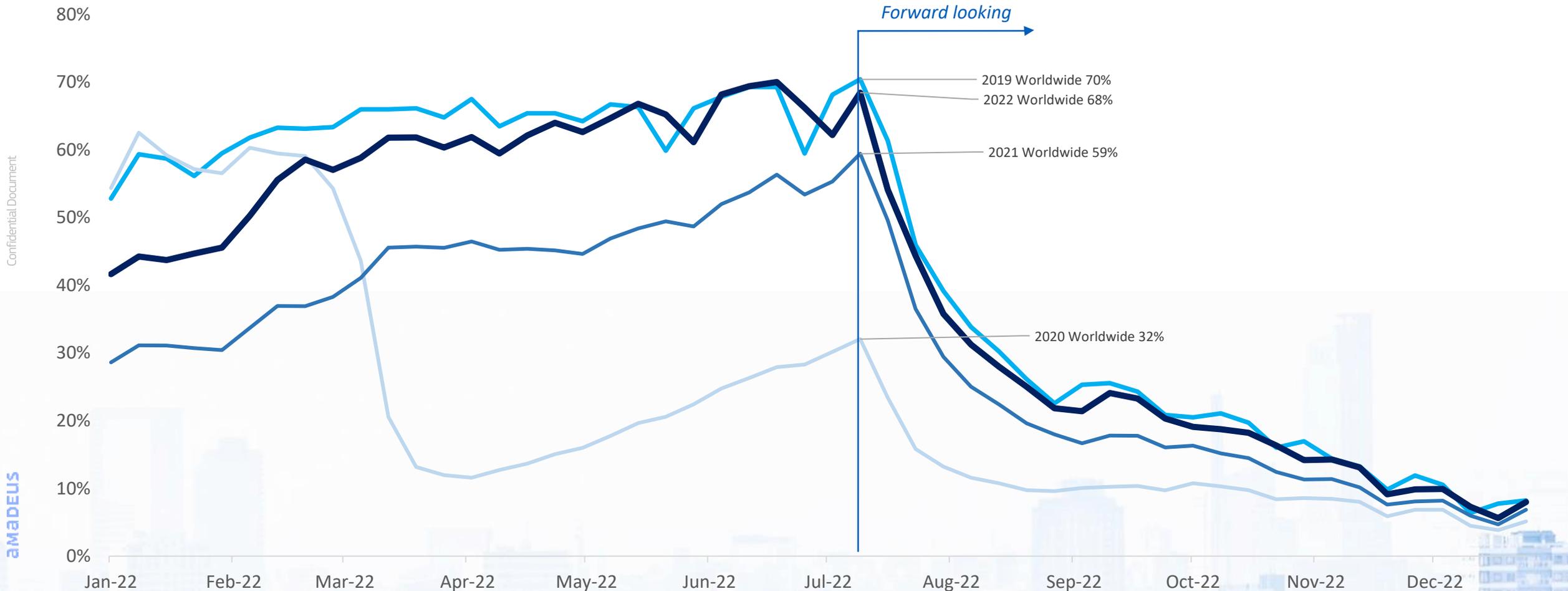


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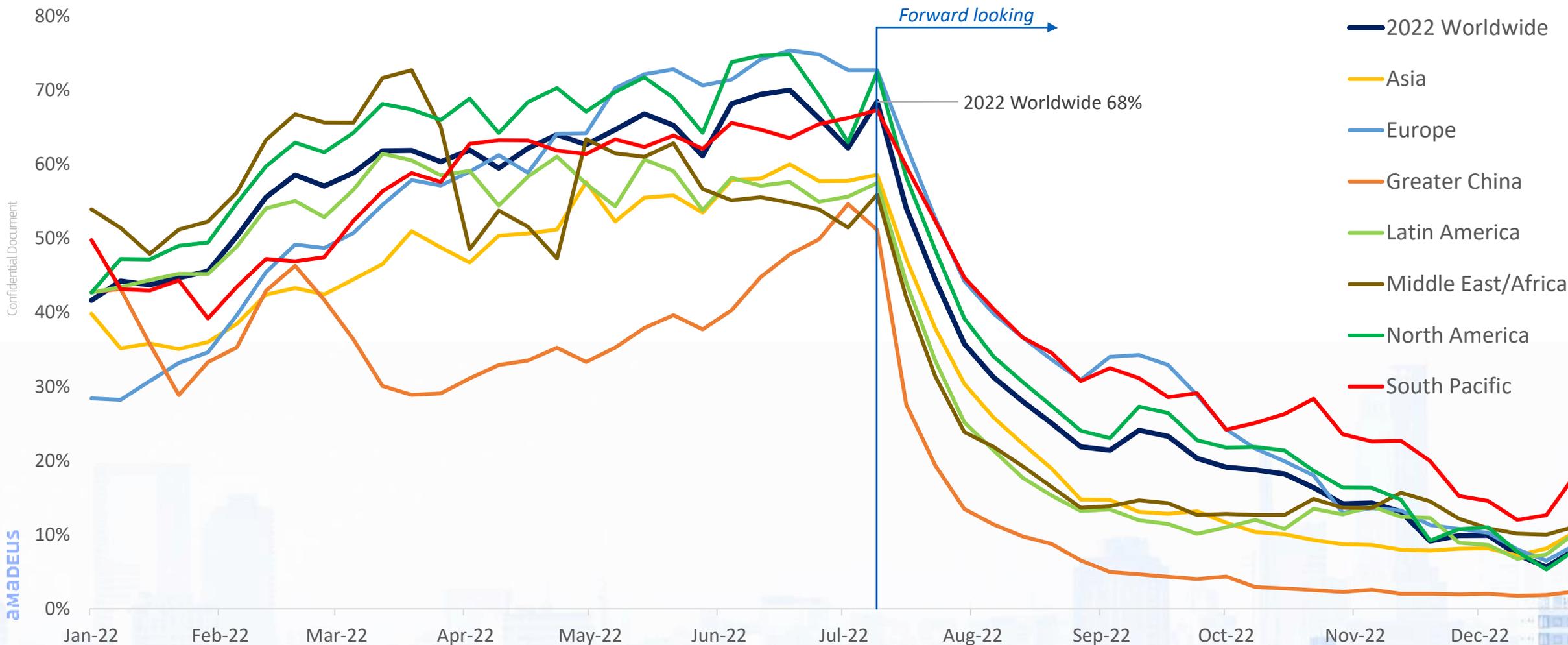
# Weekly Occupancy | Worldwide

See worldwide hotel occupancy this year side by side with the last three years actuals and on-the-books.



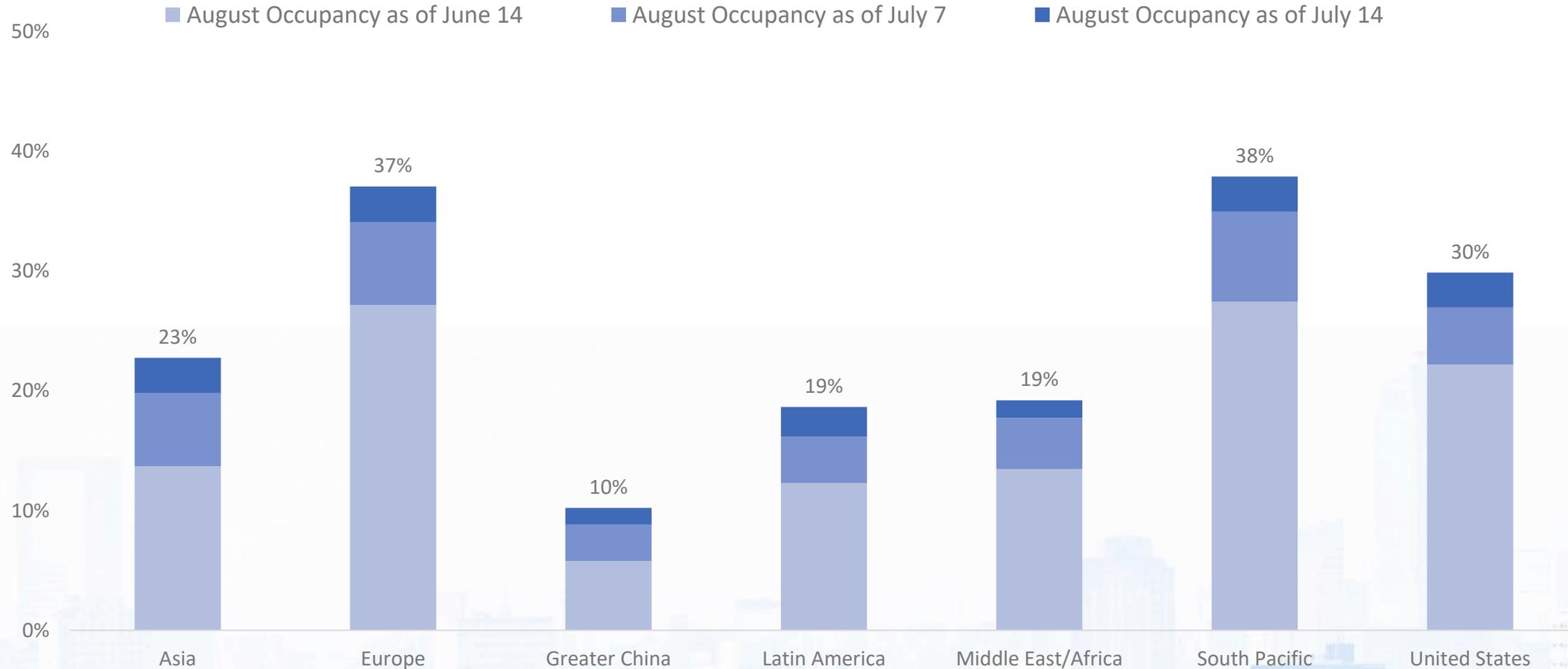
# Weekly Occupancy | Worldwide

The below graph depicts global actual and on-the-books occupancy trends broken out by region.



# Occupancy by Region | Worldwide

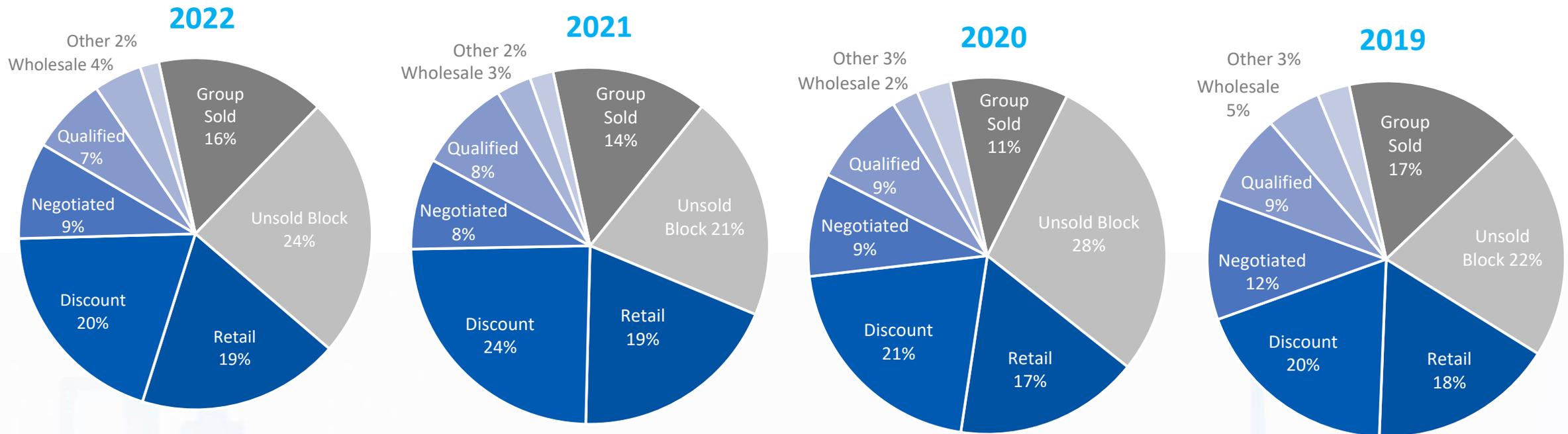
Below allows you to see how the different regions are pacing for August 2022 since mid-June.



# Year-on-Year Segmentation | Worldwide

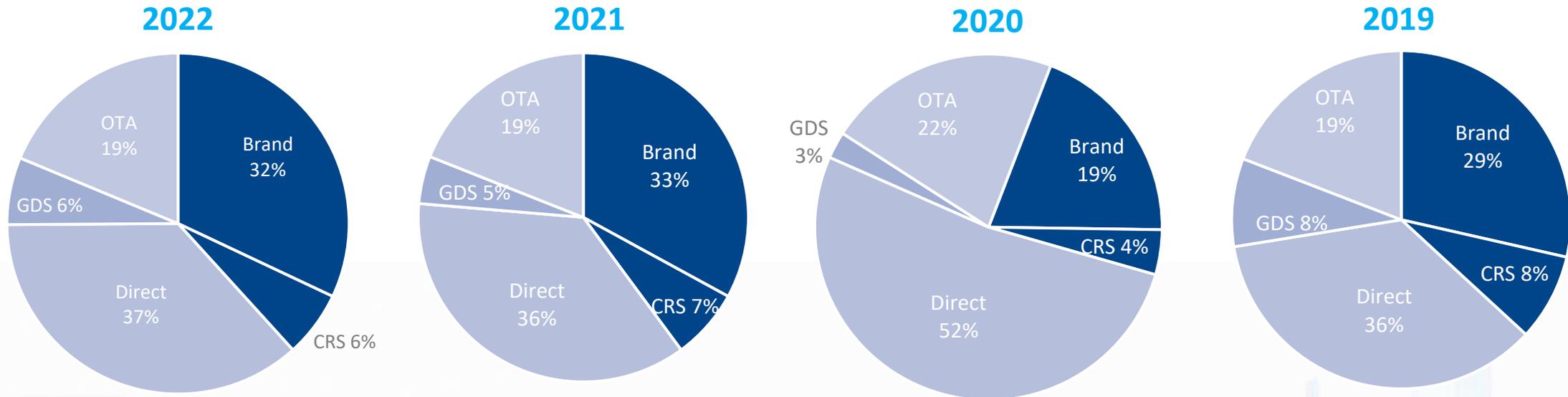
Global market segmentation mix for August 2022 on-the-books vs same time August 2021, 2020, and 2019.

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# Year-on-Year Channel Mix | Worldwide

Distribution channel mix for August 2022 on-the-books vs same time August 2021, 2020, and 2019.



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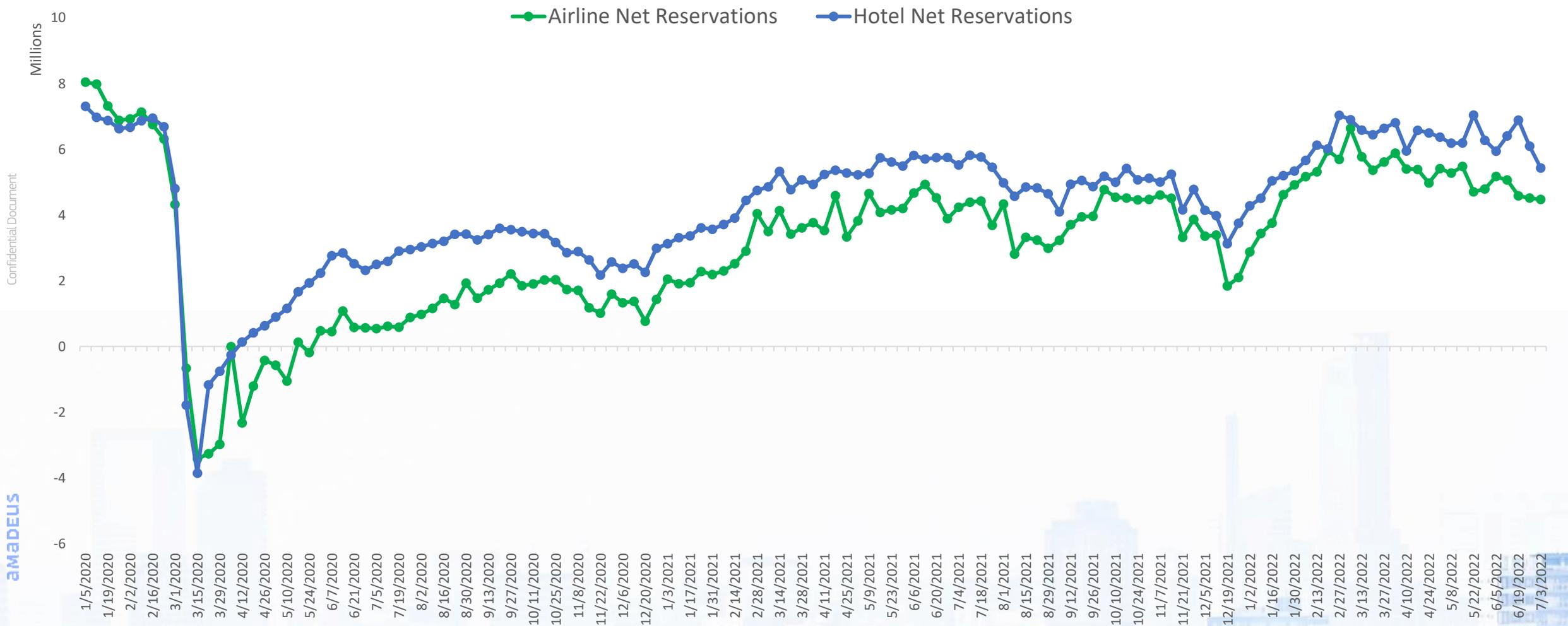
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United States

# Airline & Hotel Net Reservations | United States

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



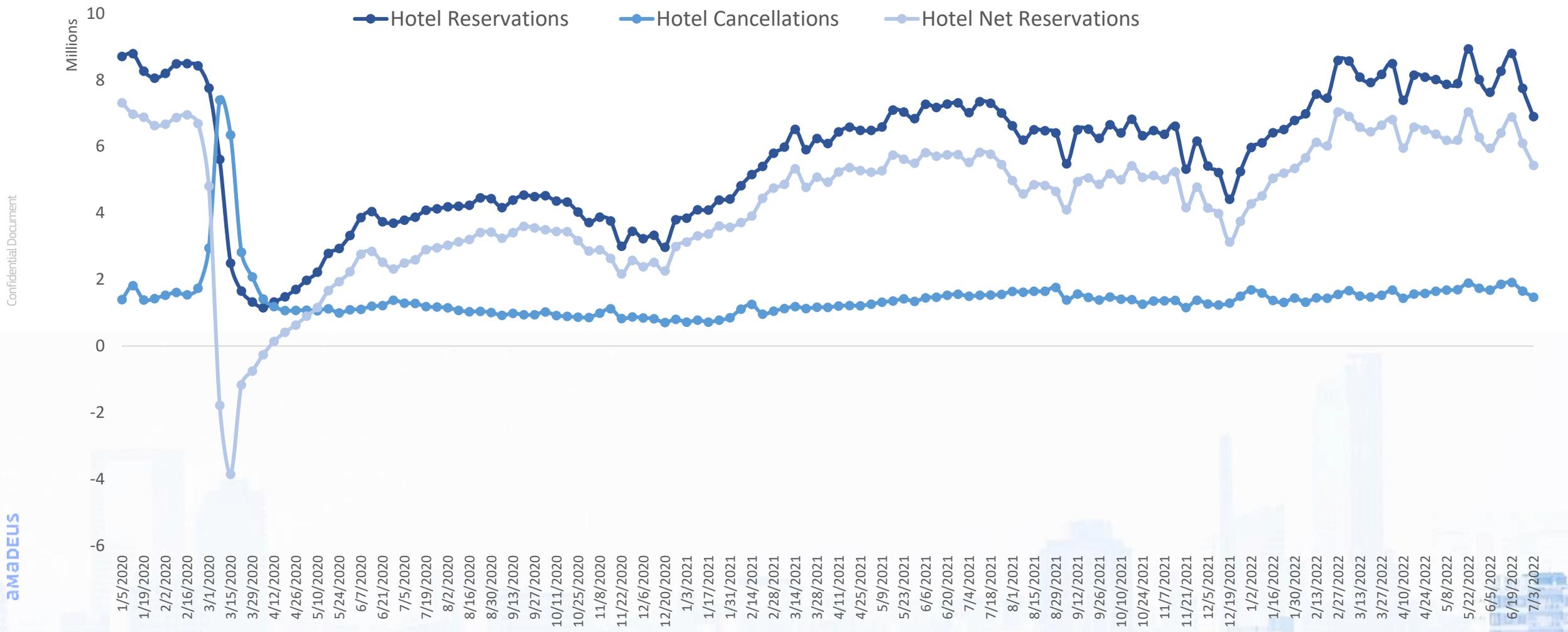
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Source: Amadeus Demand360® and GDS Airline Booking Data (MIDT) data as of July 7, 2022

# Weekly Hotel Reservation Activity | United States

Total reservations activity with cancellations and net trends.

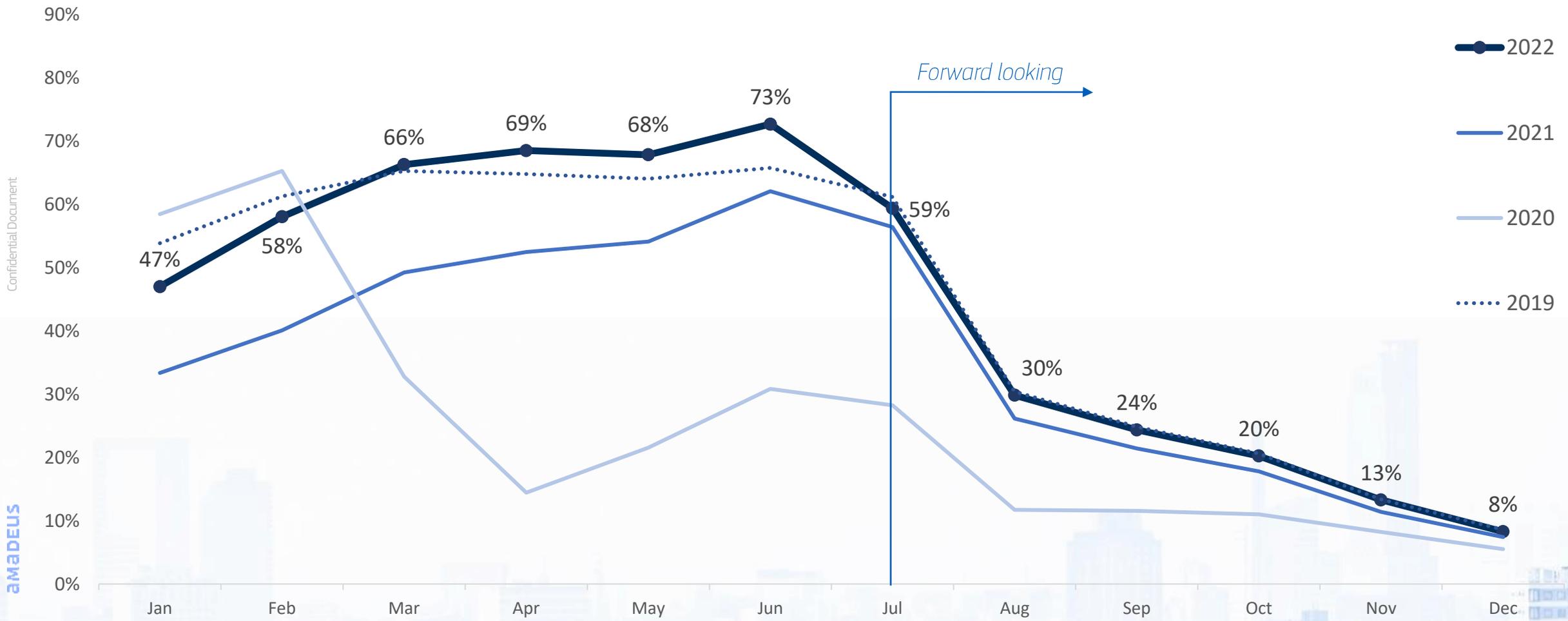


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# Monthly Occupancy & Year-on-Year Variance | United States

On-the-books occupancy by month compared to last three years.

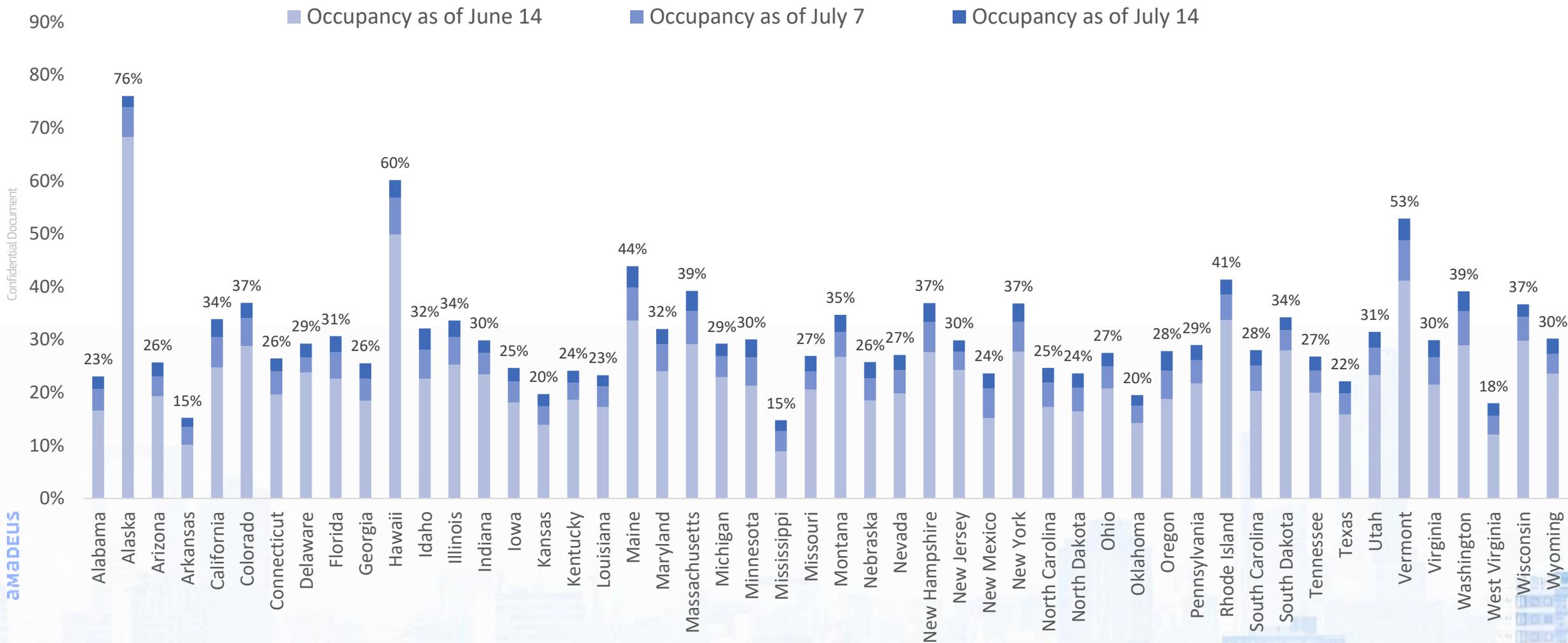


Source: Amadeus Demand360® data as of July 14, 2022

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# Occupancy & Pace by State | United States

Pace by state for August 2022 since mid-June.

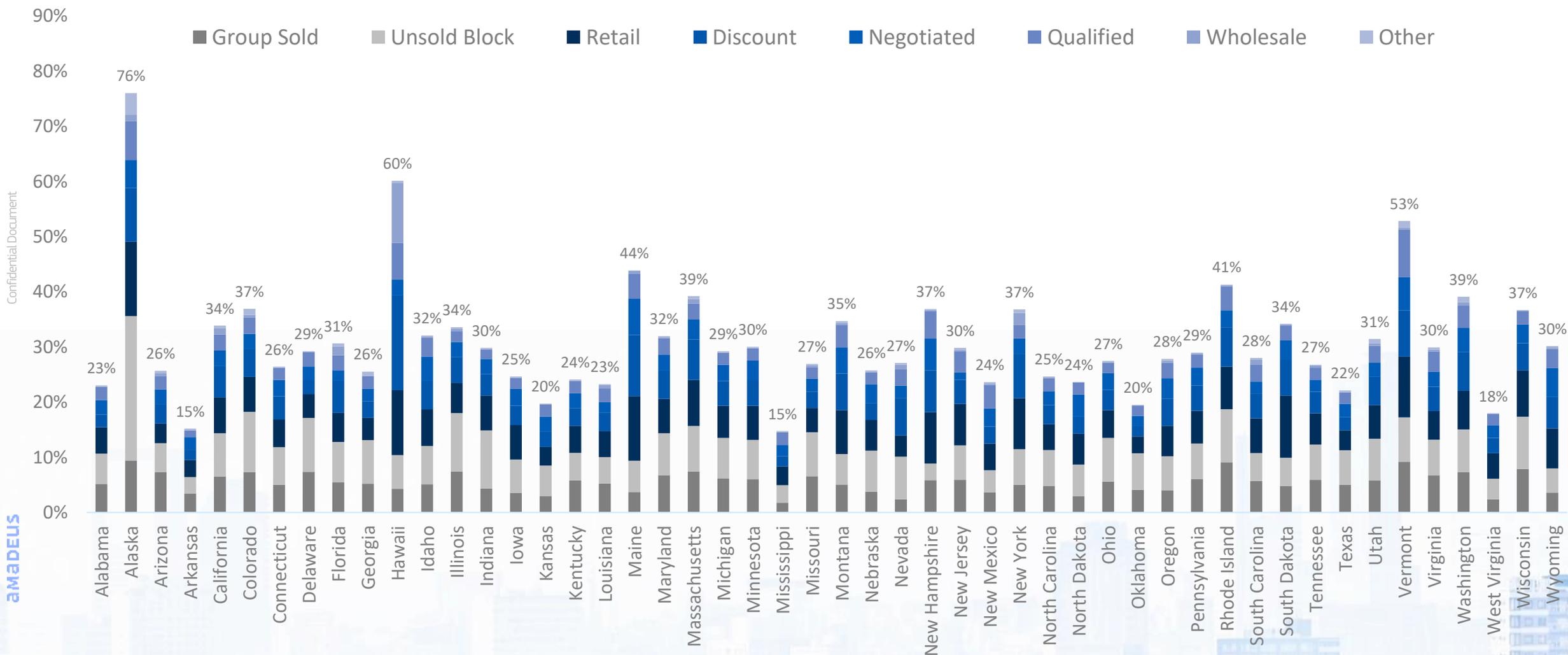


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# Occupancy & Segment by State | United States

On-the-books market segmentation contribution by state for August 2022.

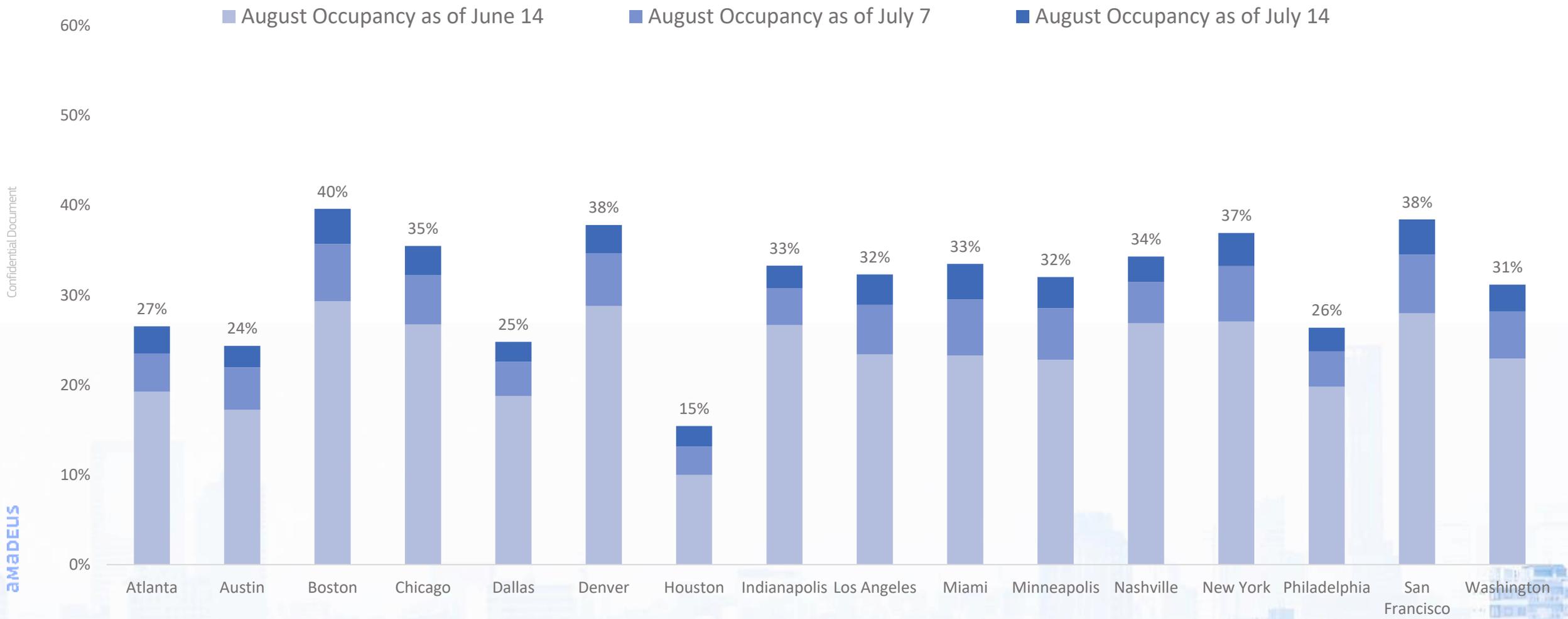


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# Occupancy & Pace by Market | United States

Pace by market for August 2022 since mid-June.

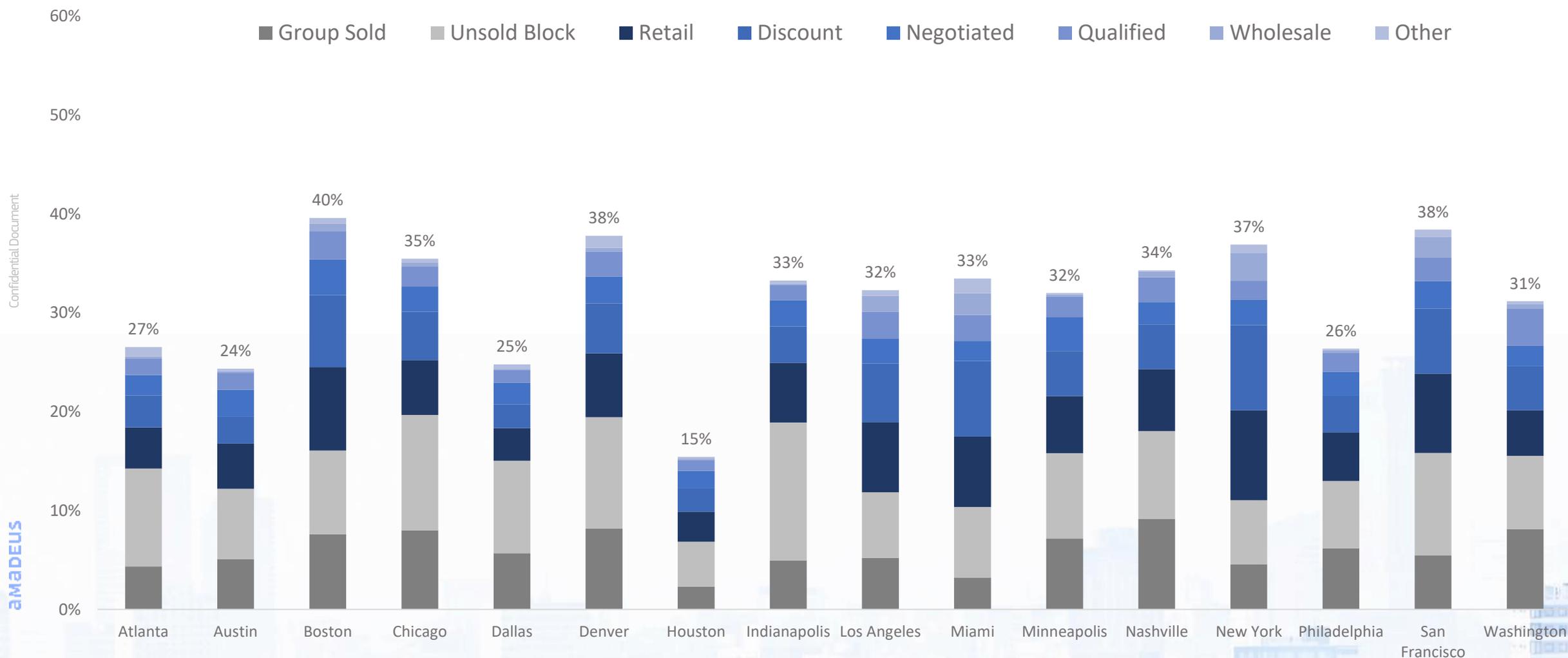


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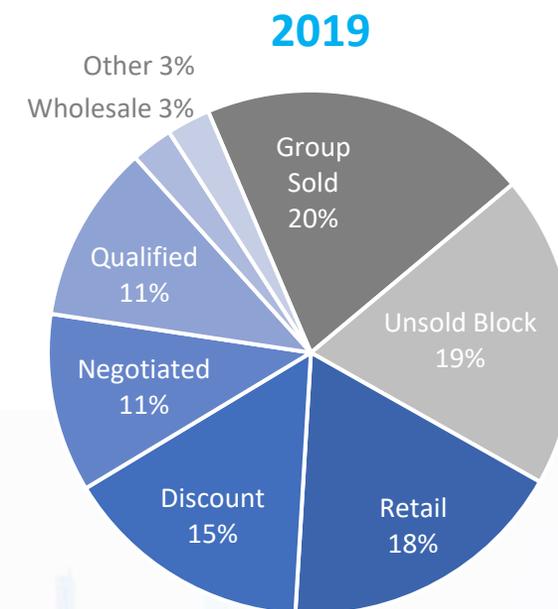
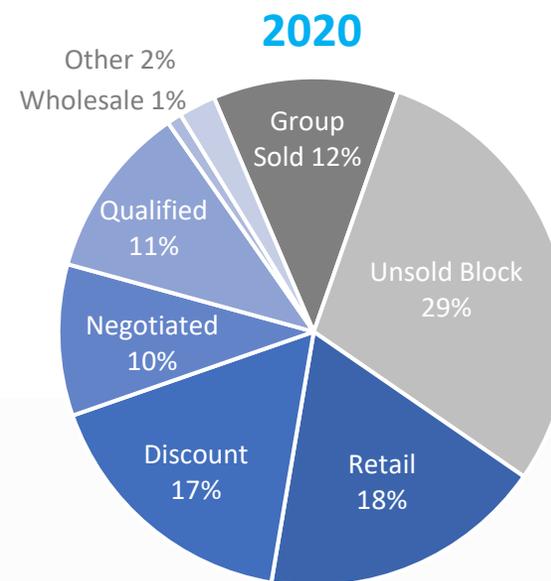
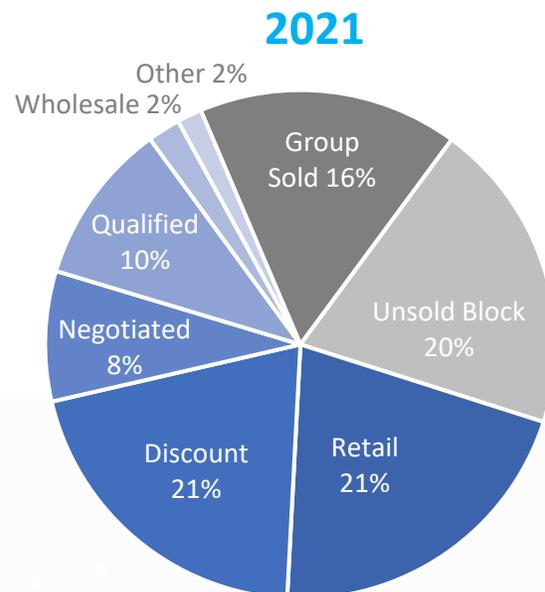
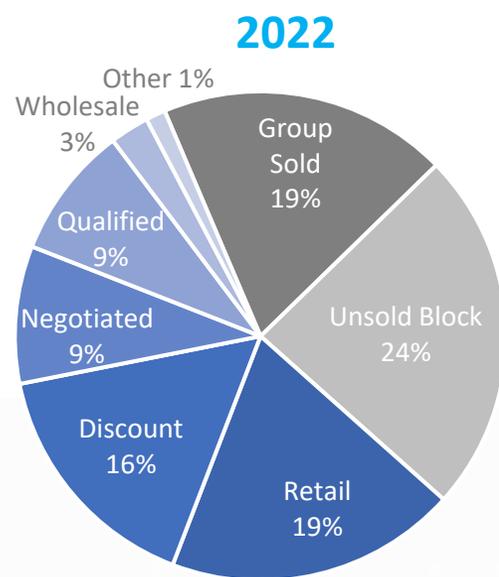
# Occupancy by Market & Segment | United States

On-the-books market segmentation contribution by market for August 2022.



# Year-on-Year Segmentation | United States

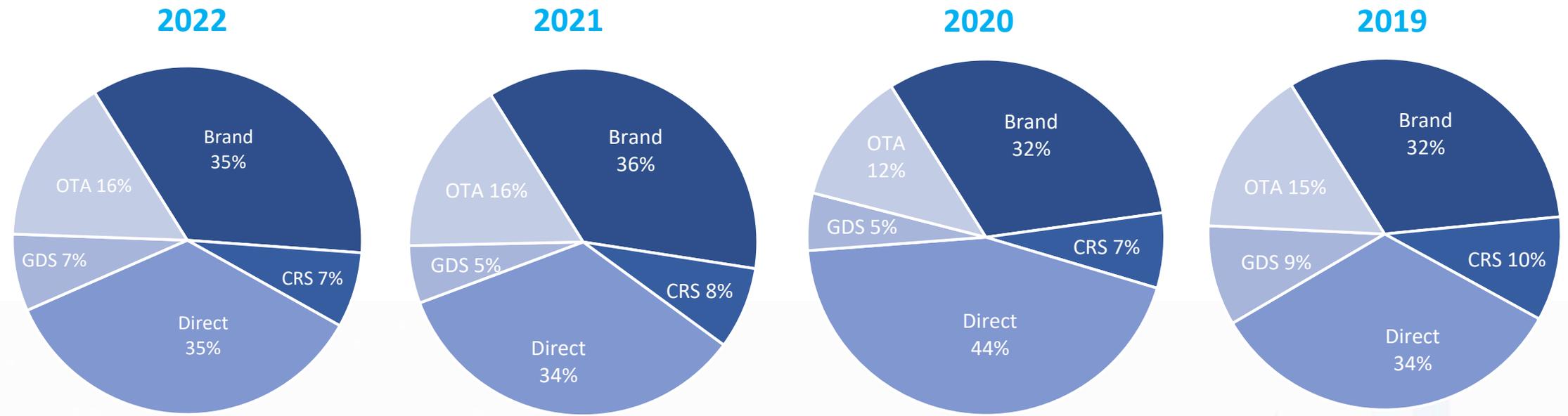
Market segmentation mix for August 2022 on-the-books same time August 2021, 2020, and 2019.



# Year-on-Year Channel Mix | United States

Distribution channel mix for August 2022 on-the-books vs same time August 2021, 2020, and 2019.

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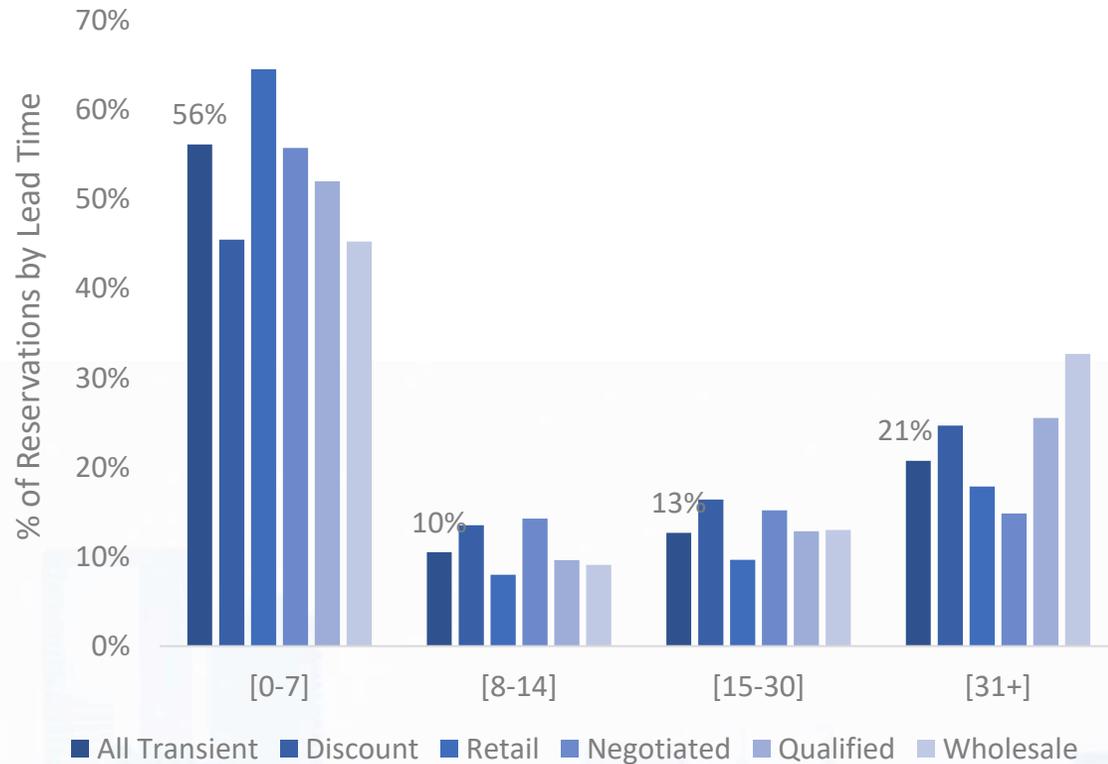


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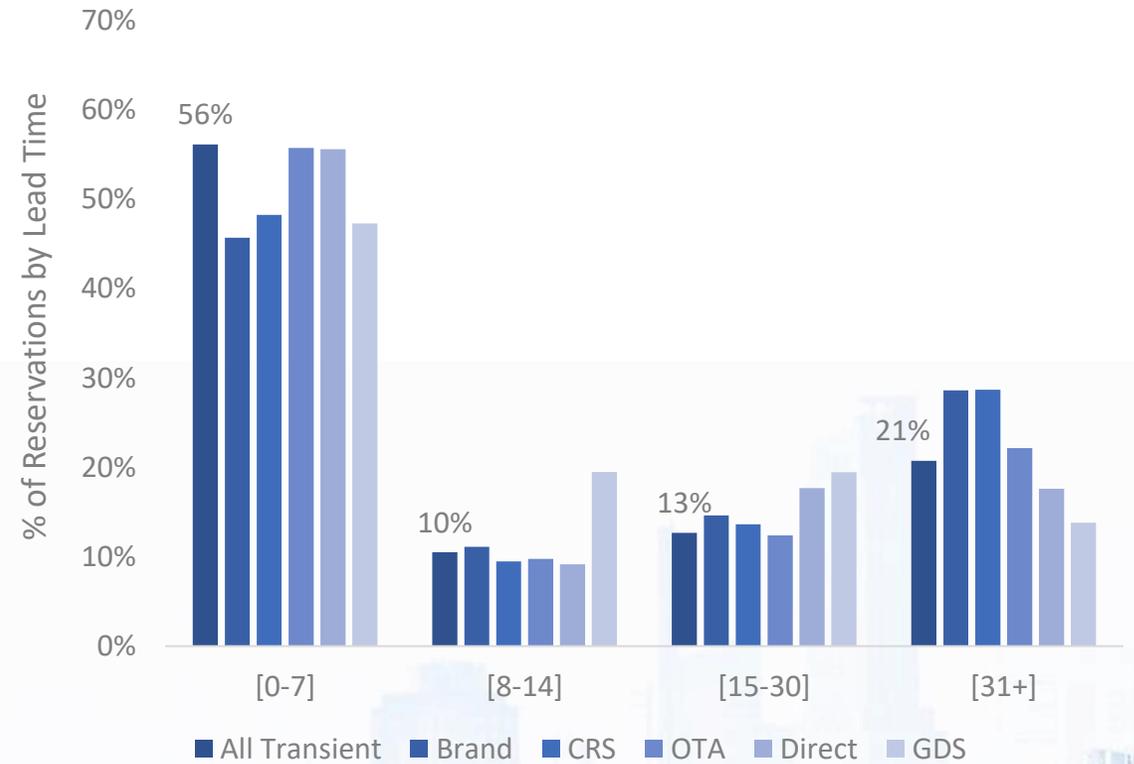
# Transient Lead Time by Segment & Channel | United States

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

### Lead Time by Segment



### Lead Time by Channel

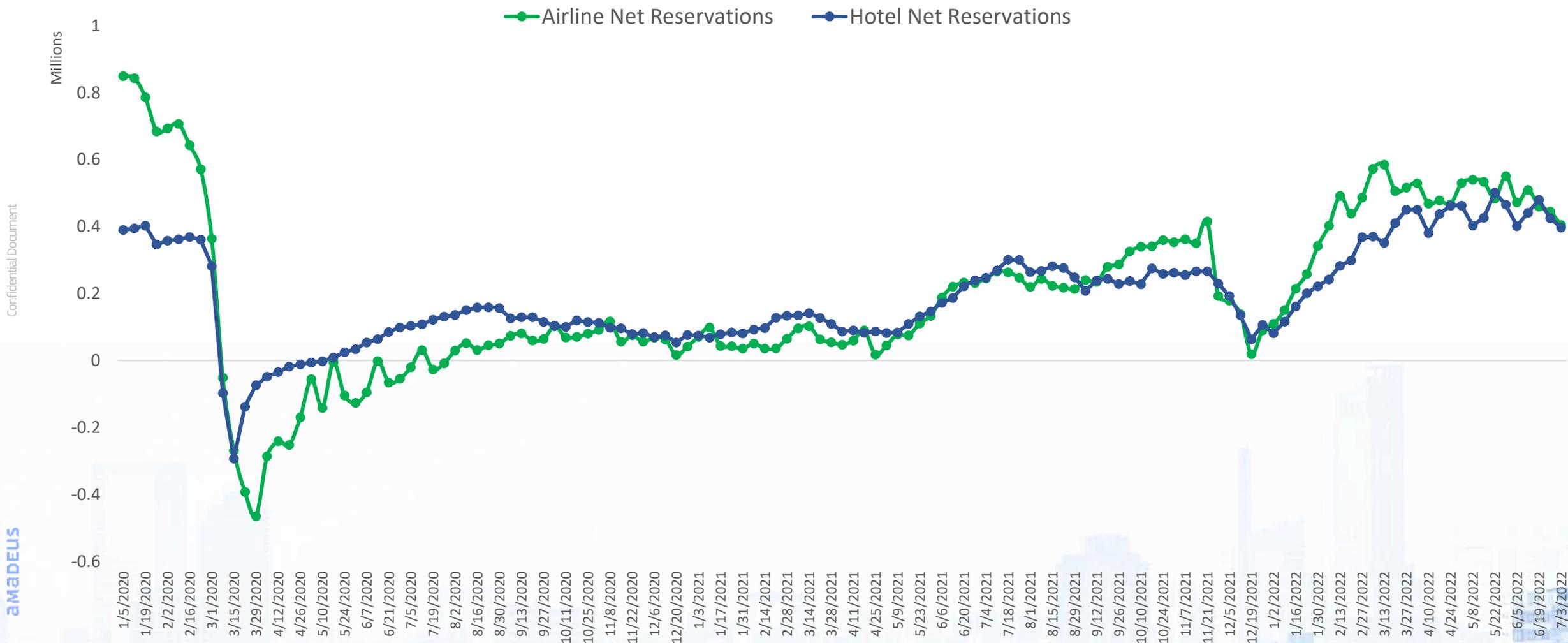




Canada

# Airline & Hotel Net Reservations | Canada

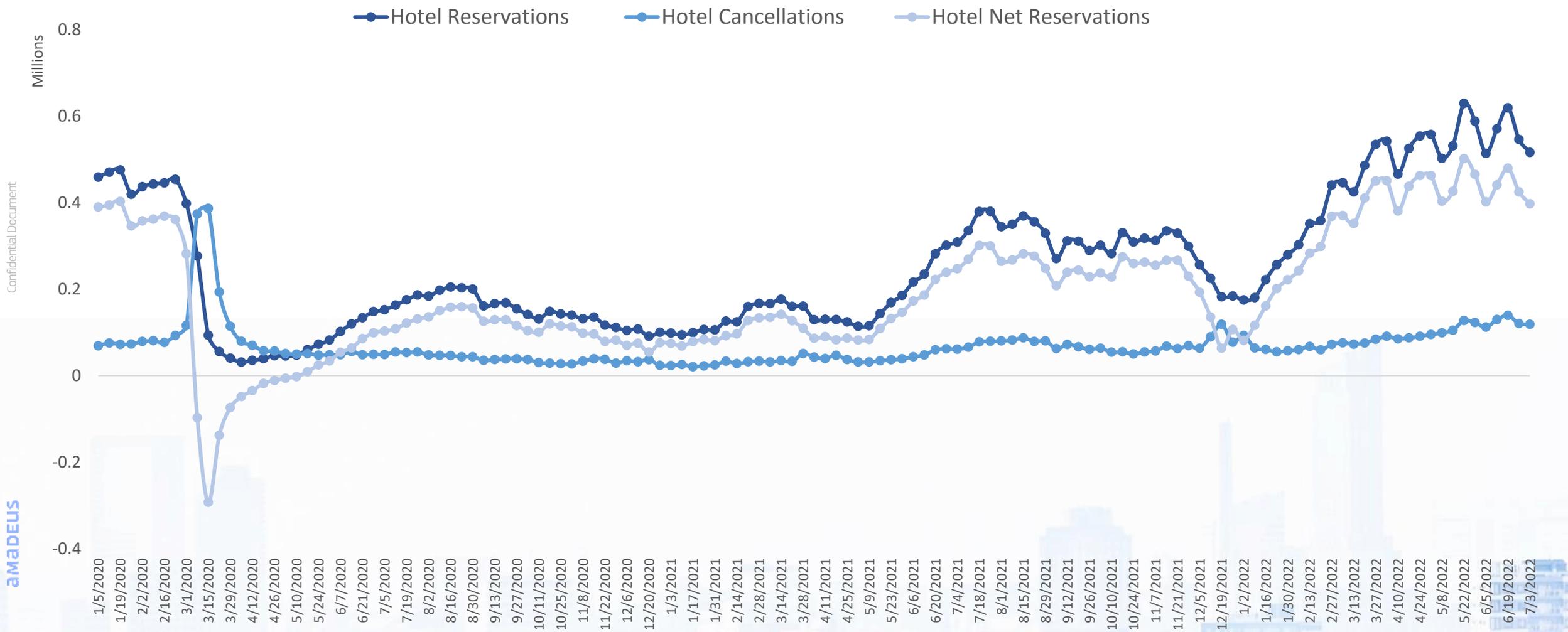
Below represents the number of net reservations booked during each week for any future travel period.



Source: Amadeus Demand360® and GDS Airline Booking Data (MIDT) data as of July 7, 2022

# Weekly Hotel Reservation Activity | Canada

Total reservations activity with cancellations and net trends.



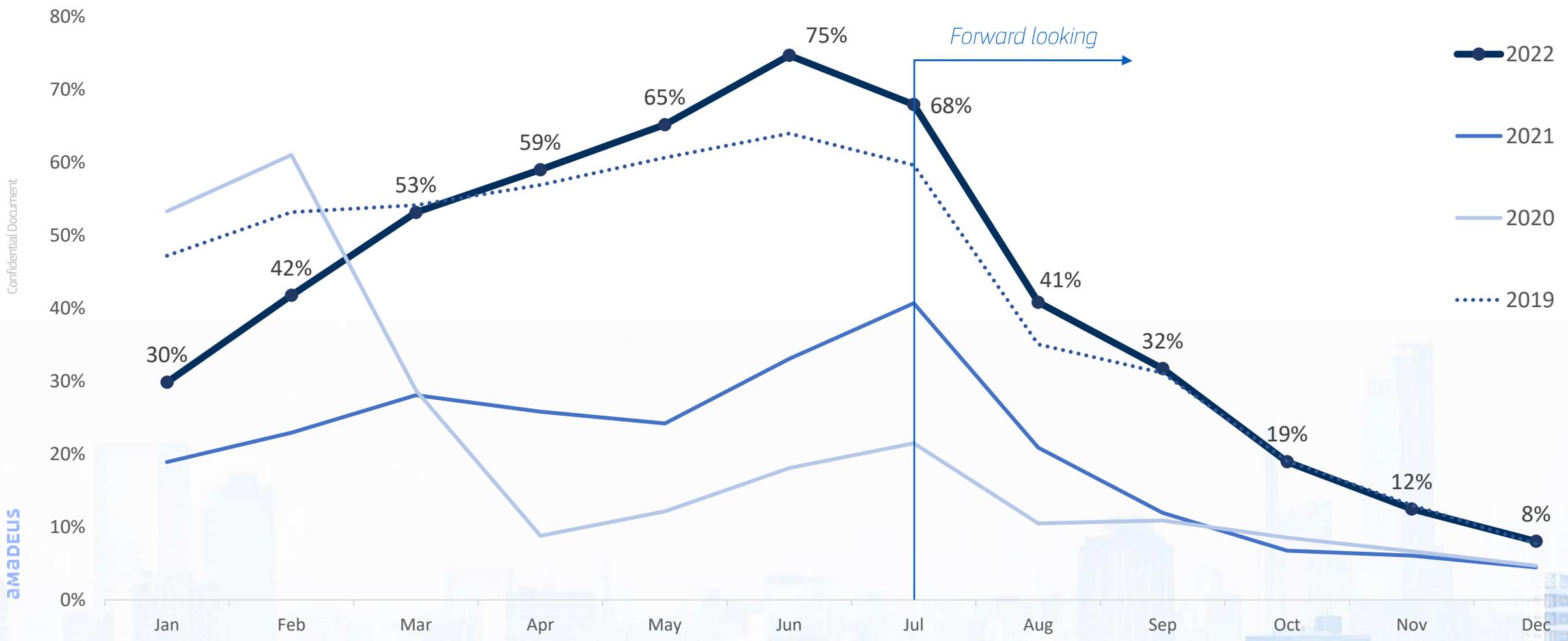
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# Monthly Occupancy & Year-on-Year Variance | Canada

On-the-books occupancy by month compared to last three years.

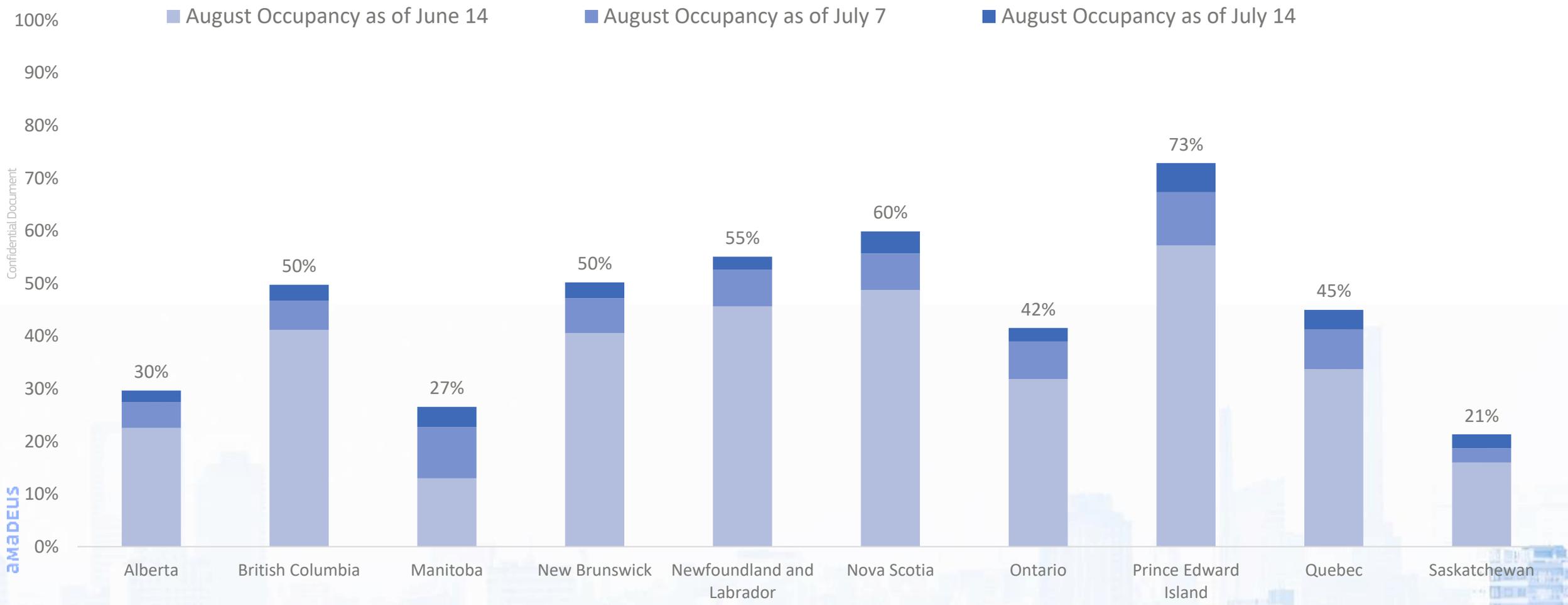


Source: Amadeus Demand360® data as of July 14, 2022

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# Occupancy by Province & Pace | Canada

Pace by province for August 2022 since mid-June.

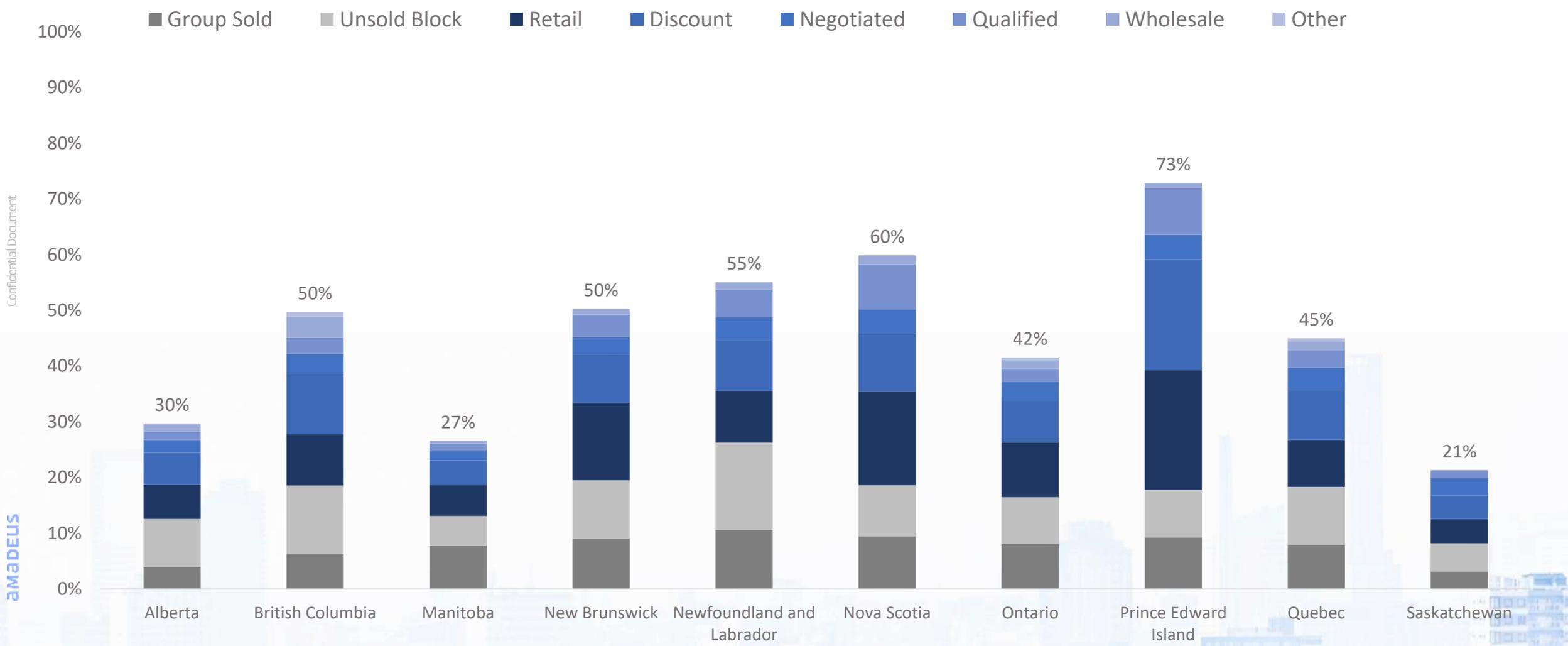


Source: Amadeus Demand360® data as of July 14, 2022

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# Occupancy by Province & Segment | Canada

On-the-books market segmentation contribution by province for August 2022.

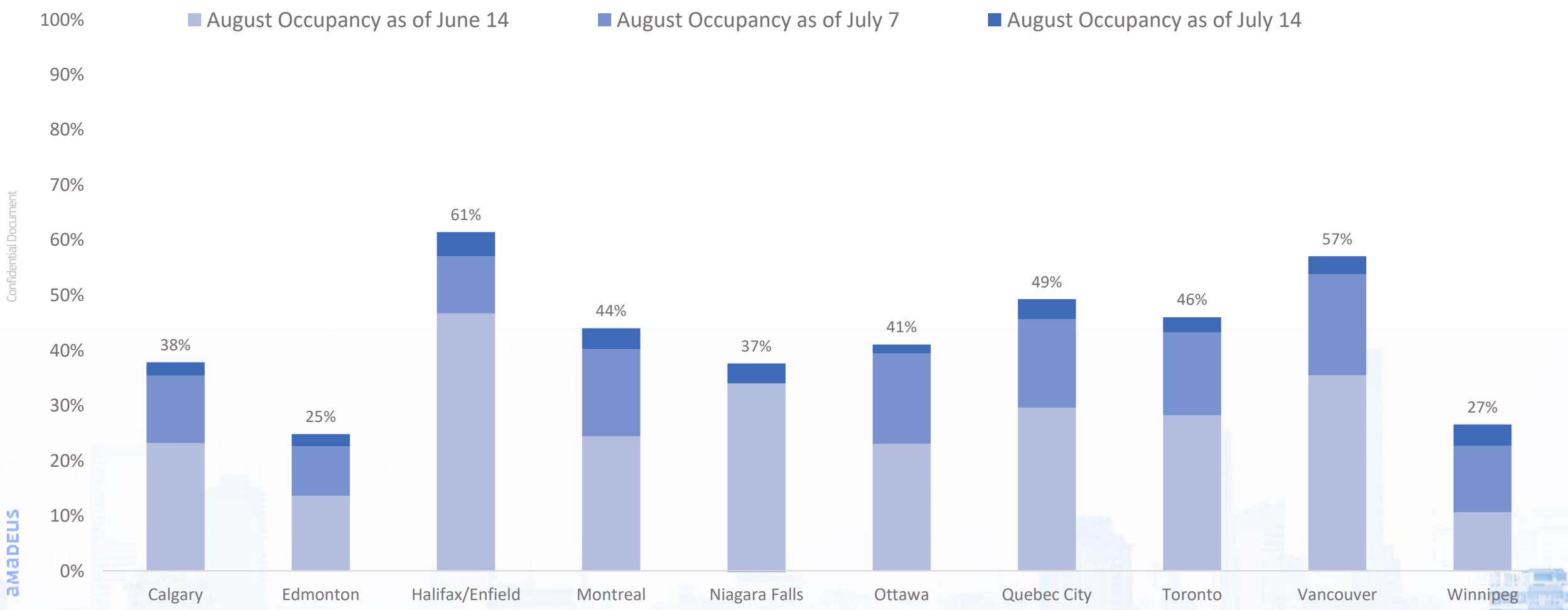


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# Occupancy by Market & Pace | Canada

Pace by market for August 2022 since mid-June.

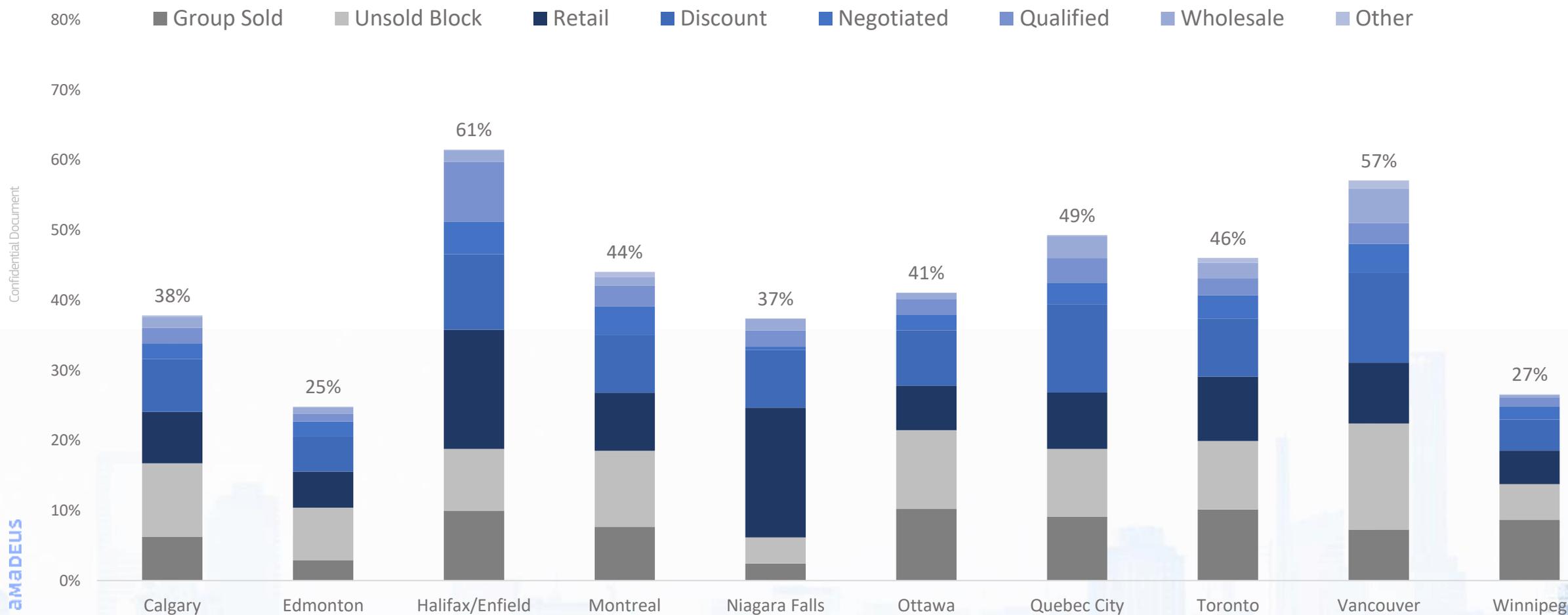


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# Occupancy by Market & Segment | Canada

Segmentation by market for August 2022 since mid-June.

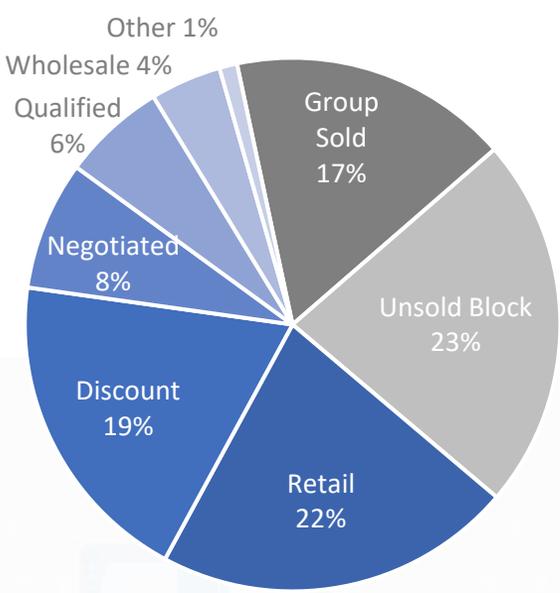


# Year-on-Year Segmentation | Canada

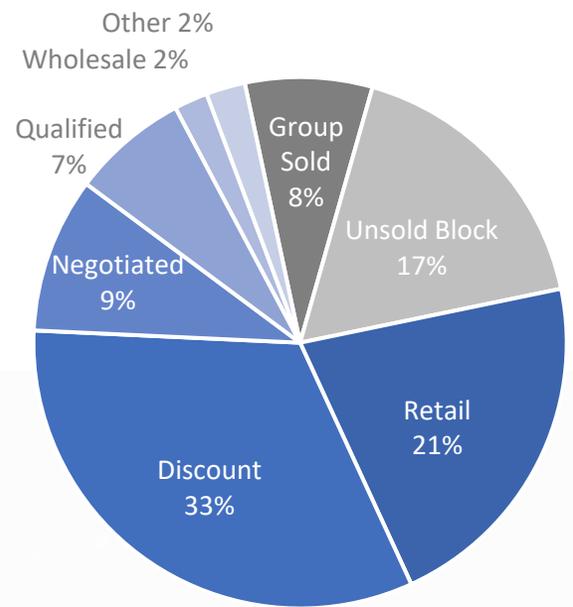
Market segmentation mix for August 2022 on-the-books vs same time August 2021, 2020, and 2019.

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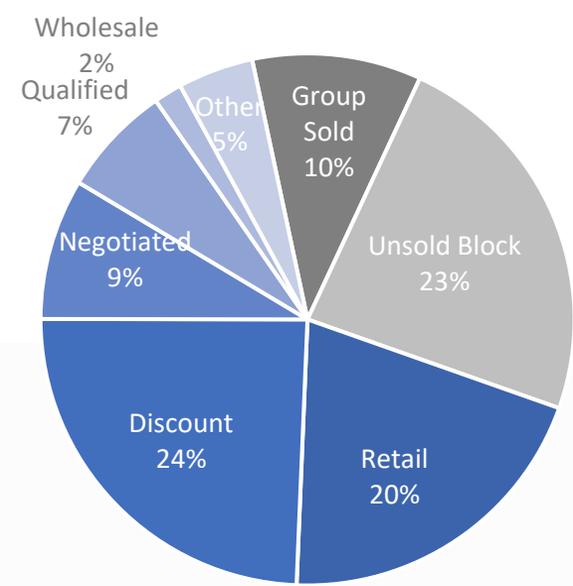
### 2022



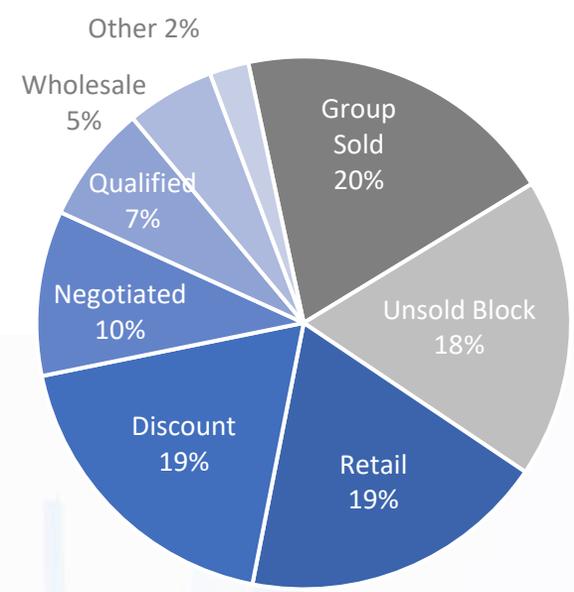
### 2021



### 2020



### 2019



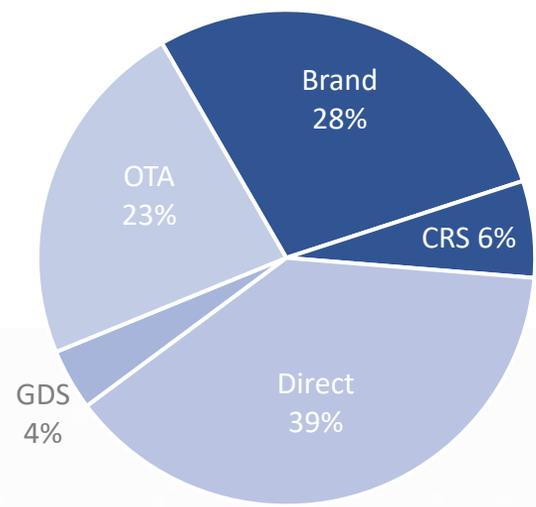
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# Year-on-Year Channel Mix | Canada

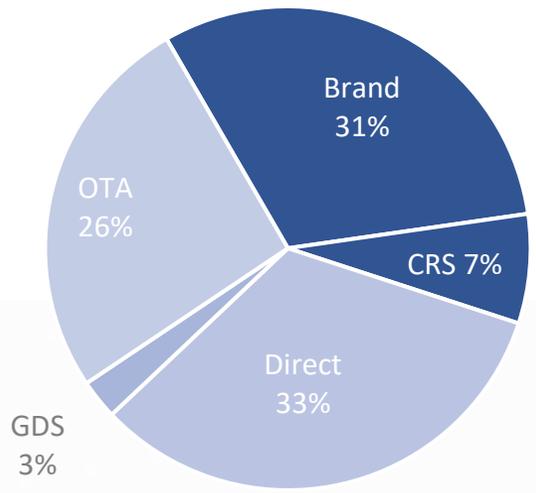
Distribution channel mix for August 2022 on-the-books vs same time August 2021, 2020, and 2019.

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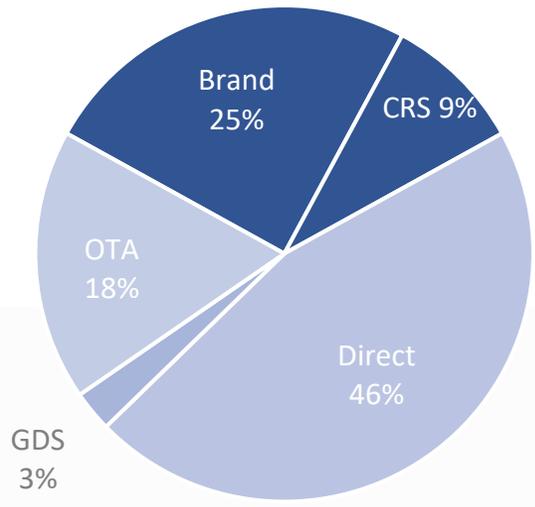
### 2022



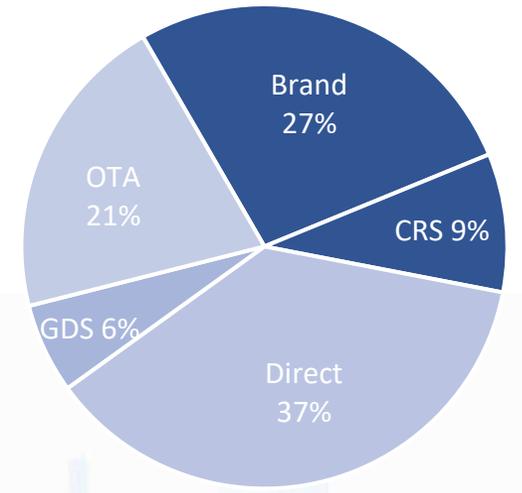
### 2021



### 2020



### 2019

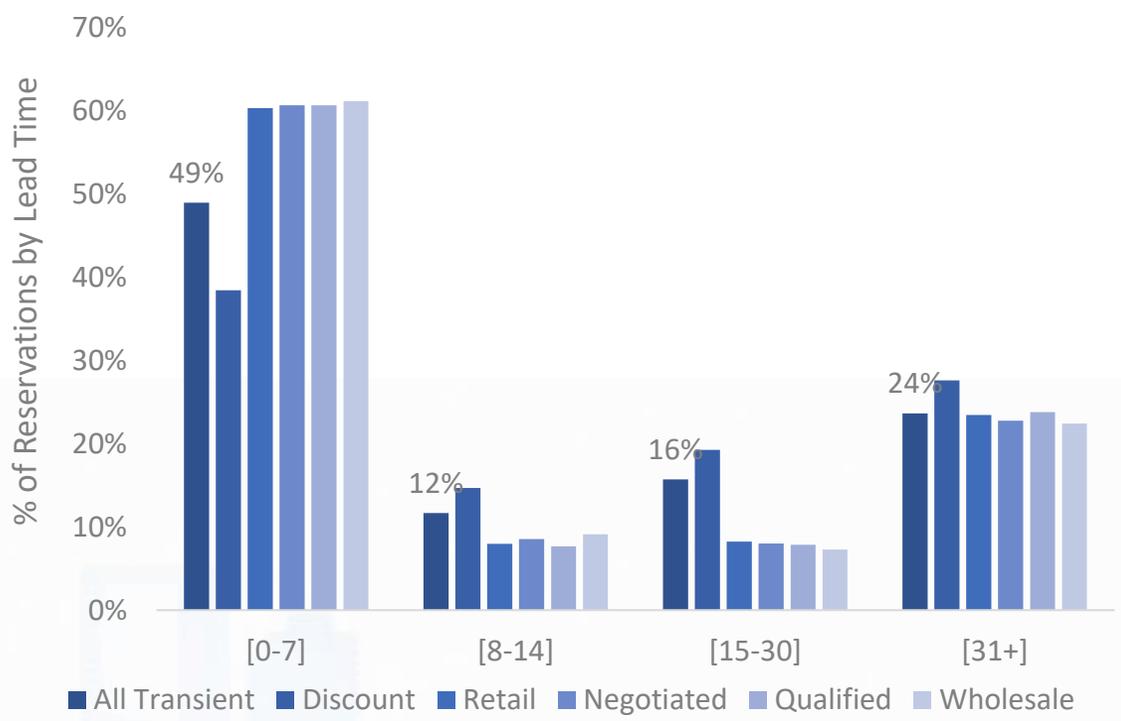


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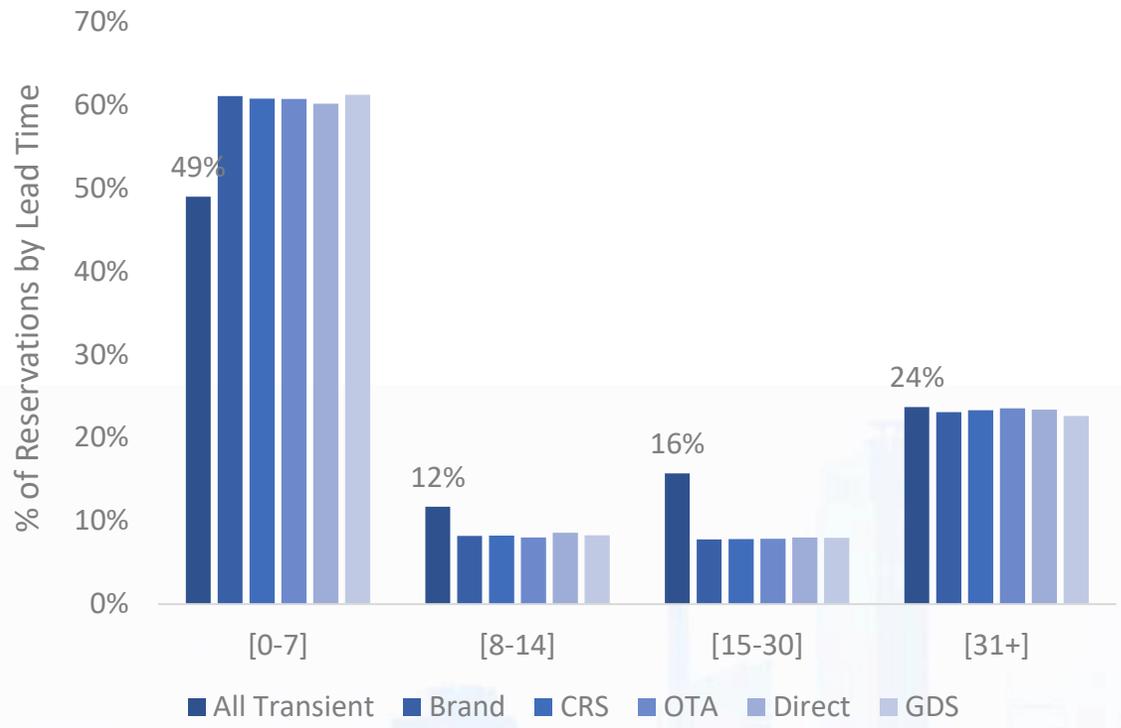
# Transient Lead Time by Segment & Channel | Canada

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

### Lead Time by Segment



### Lead Time by Channel



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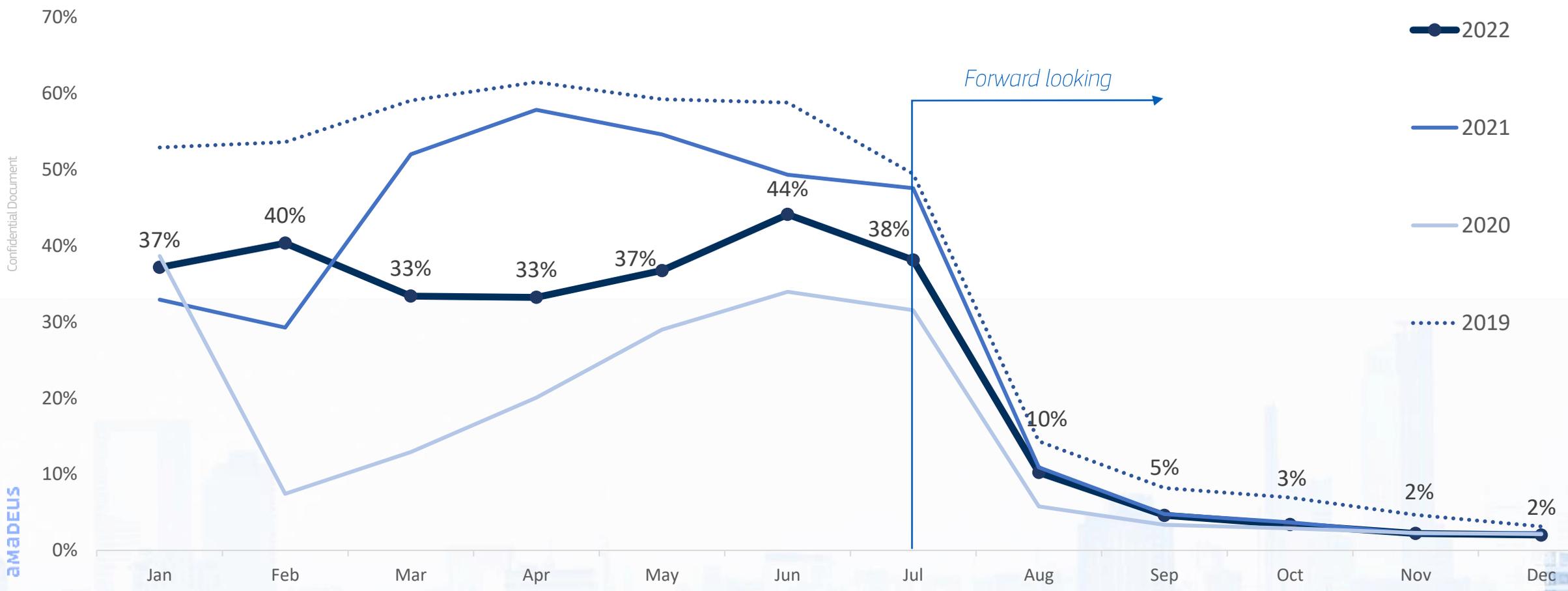
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Greater China

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

On-the-books occupancy by month compared to last three years.

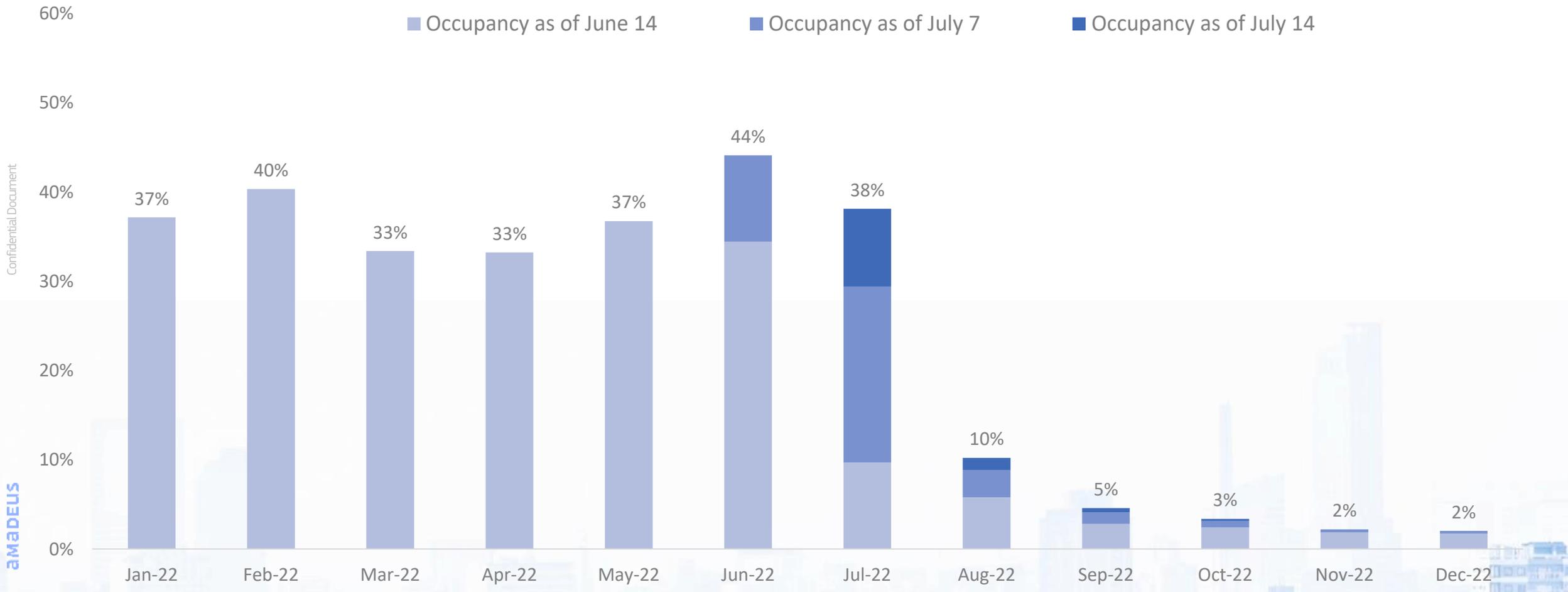


Source: Amadeus Demand360® data as of July 14, 2022

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# Monthly Occupancy & Pace | Greater China

Occupancy and pace by month since mid-June.

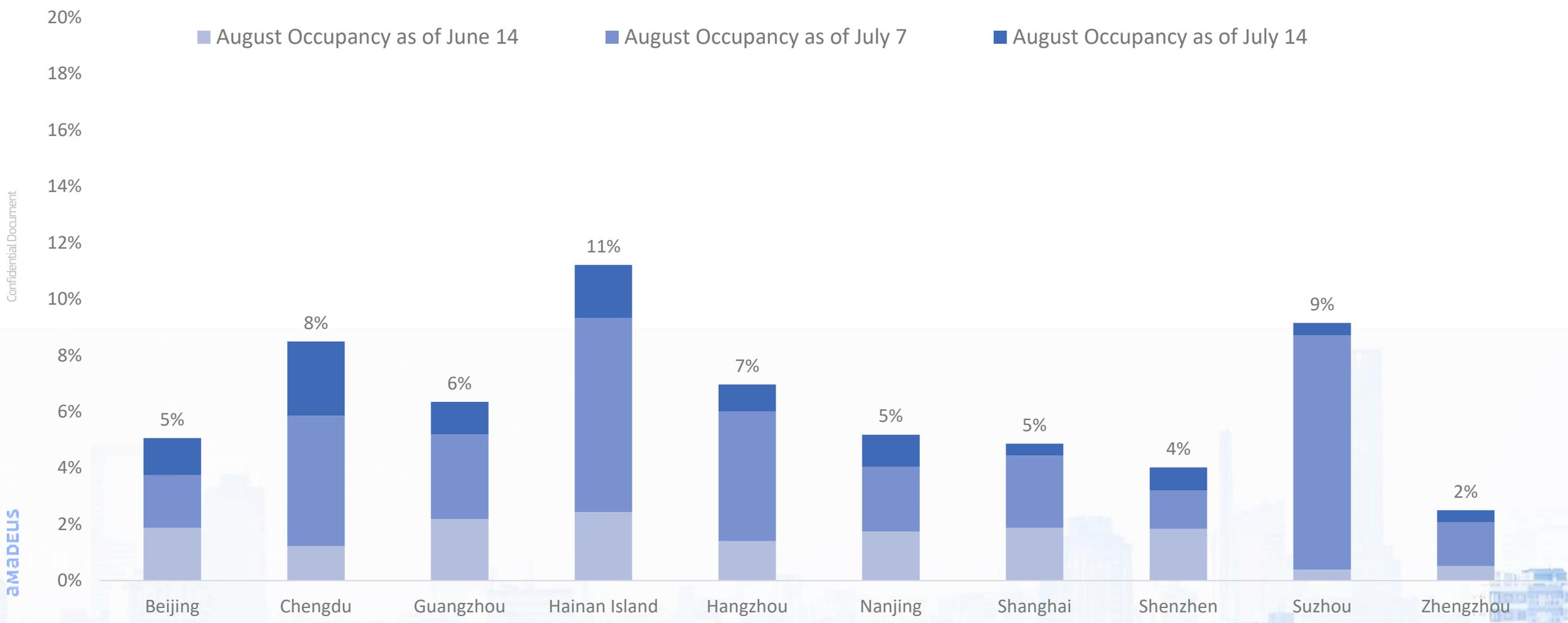


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# Occupancy by Market & Pace | Greater China

Pace by market for August 2022 since mid-June.



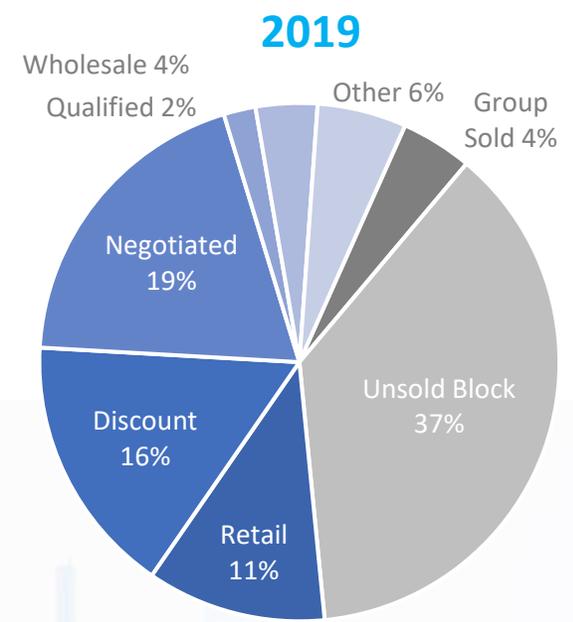
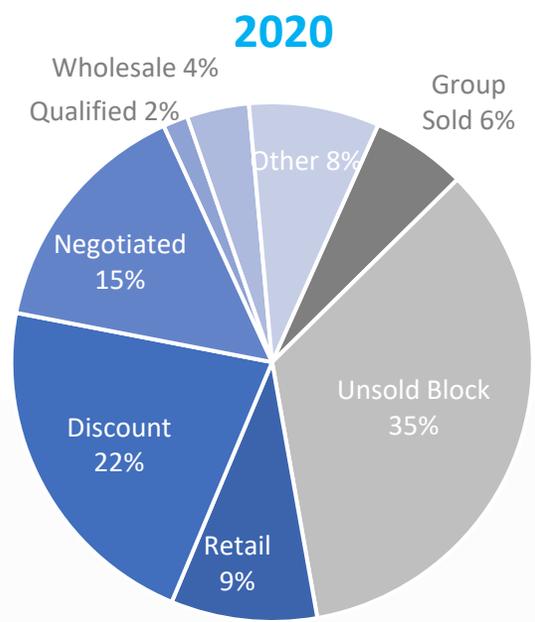
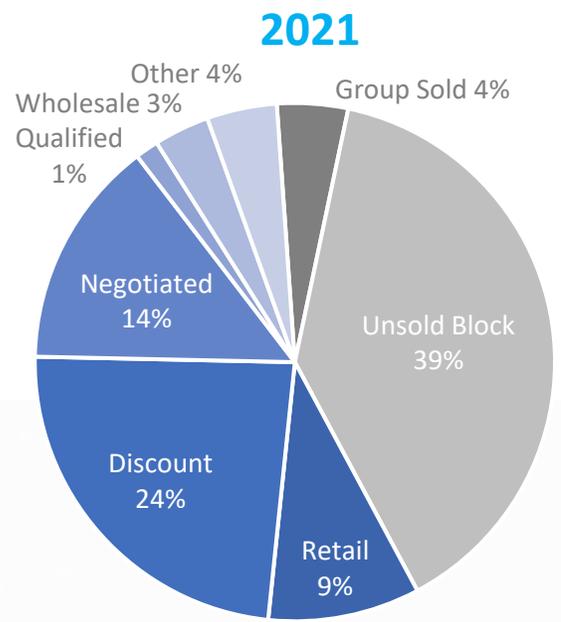
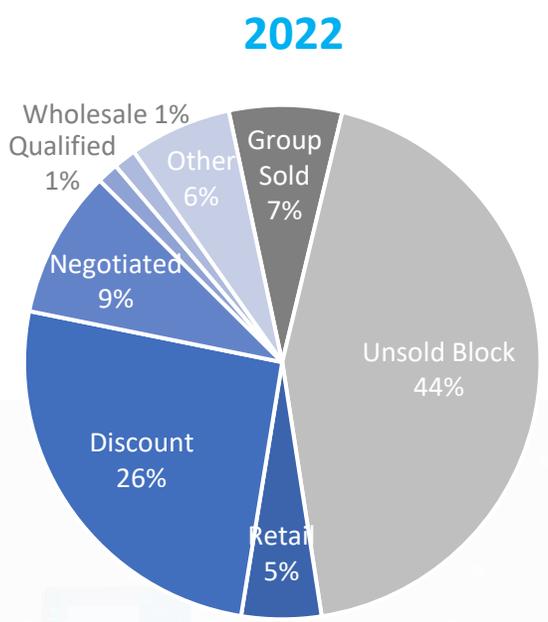
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# Year-on-Year Segmentation | Greater China

Market segmentation mix for August 2022 on-the-books vs same time August 2021, 2020, and 2019.

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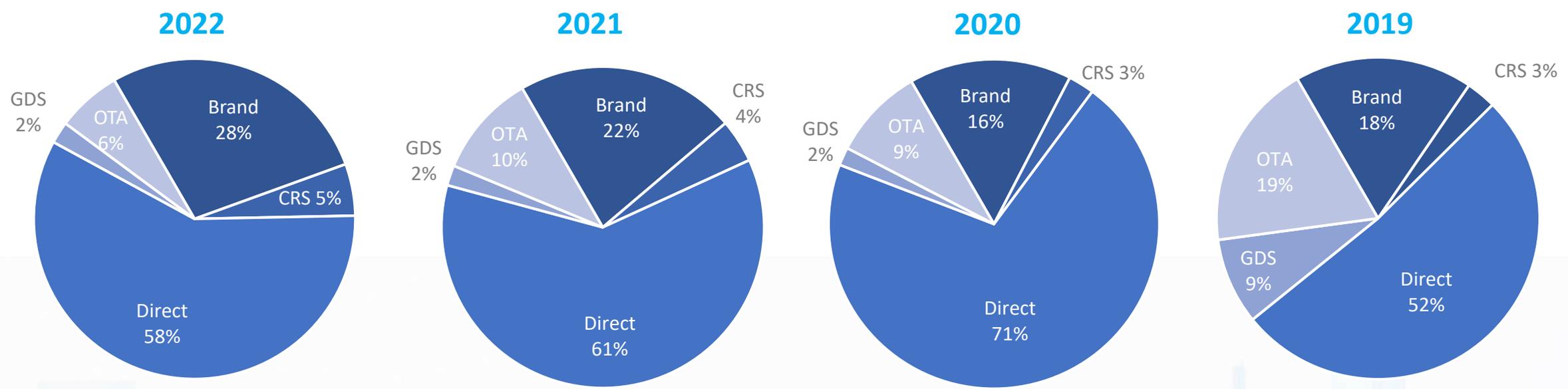


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# Year-on-Year Channel Mix | Greater China

Distribution channel mix for August 2022 on-the-books vs same time August 2021, 2020, and 2019.

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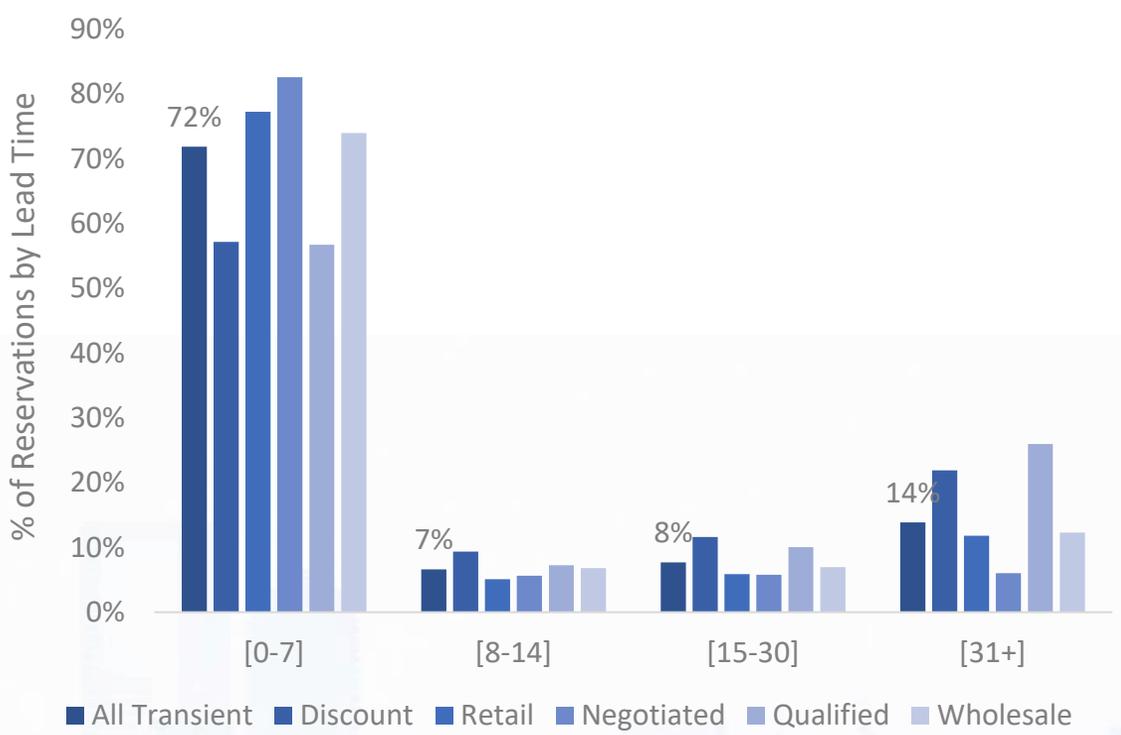
# Transient Lead Time by Segment & Channel | Greater China

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

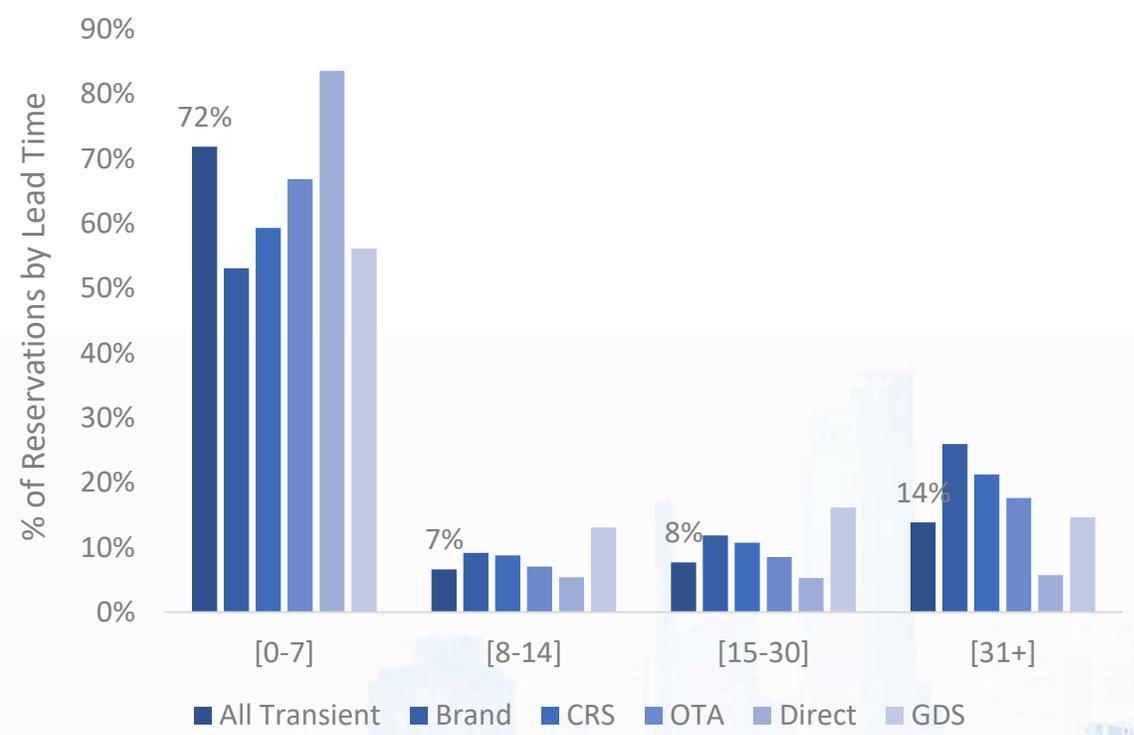
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### Lead Time by Segment



### Lead Time by Channel

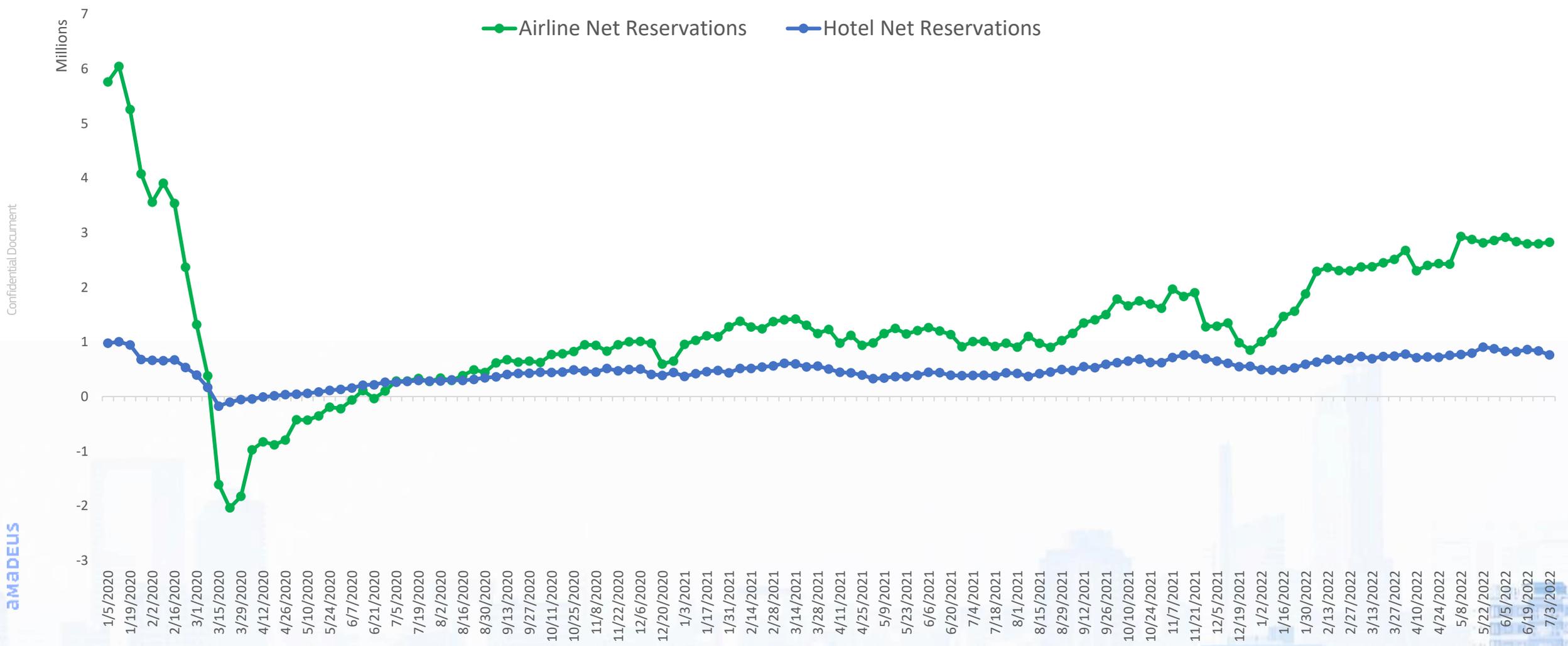


# Rest of Asia Pacific



# Airline & Hotel Net Reservations | Rest of Asia Pacific

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



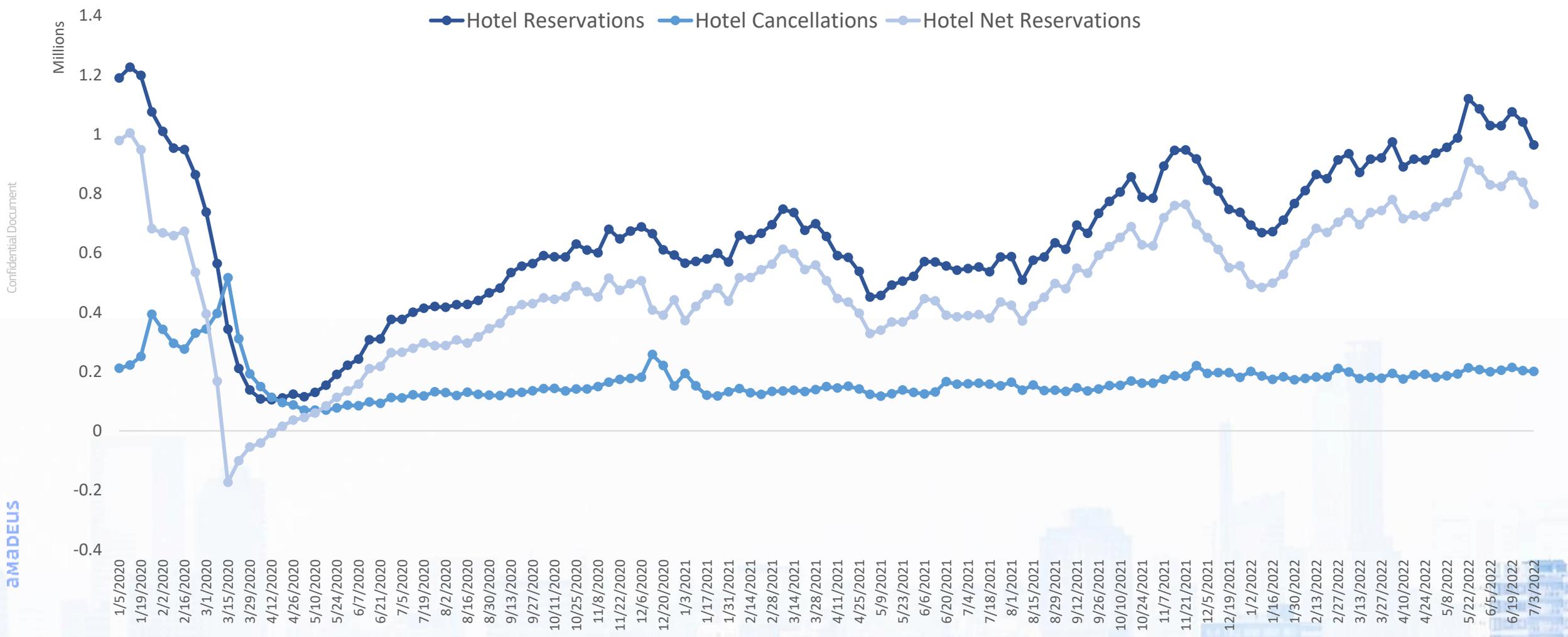
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Source: Amadeus Demand360® and GDS Airline Booking Data (MIDT) data as of July 7, 2022

# Weekly Hotel Reservation Activity | Rest of Asia Pacific

Total reservations activity with cancellations and net trends.

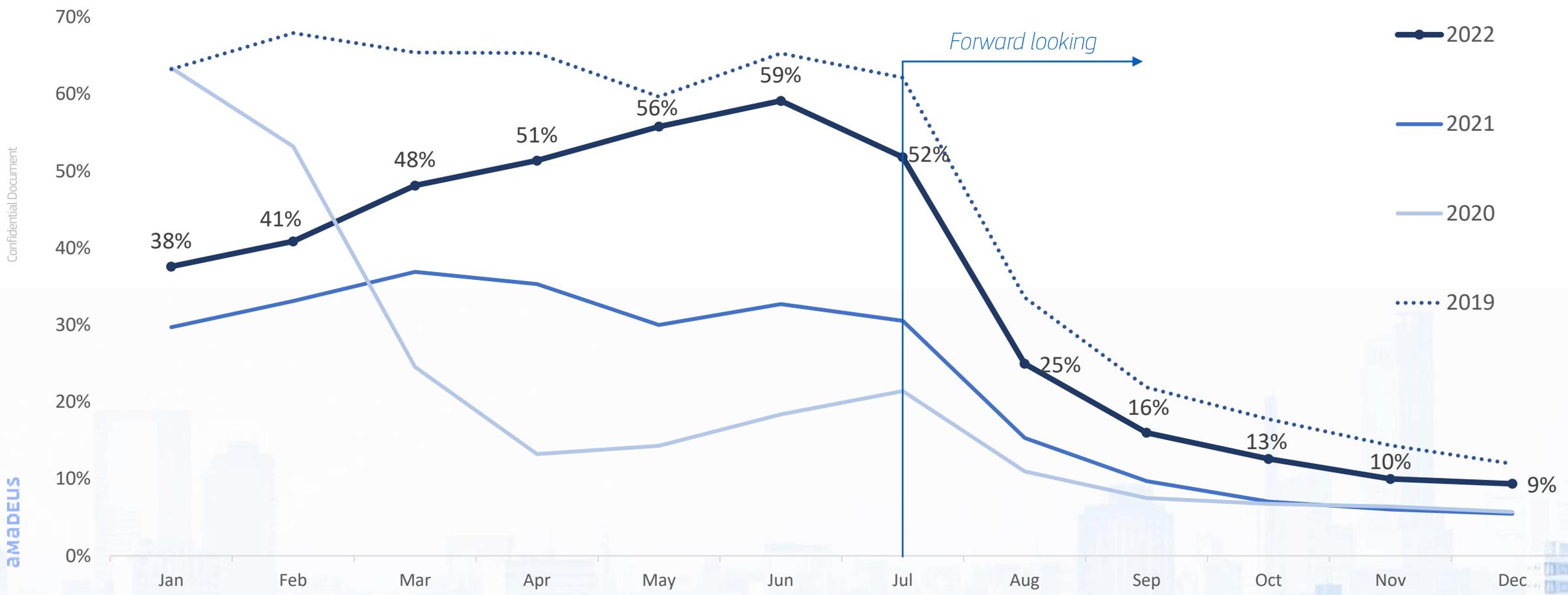


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# Monthly Occupancy & Year-on-Year Variance | Rest of Asia Pacific

On-the-books occupancy by month compared to last three years.

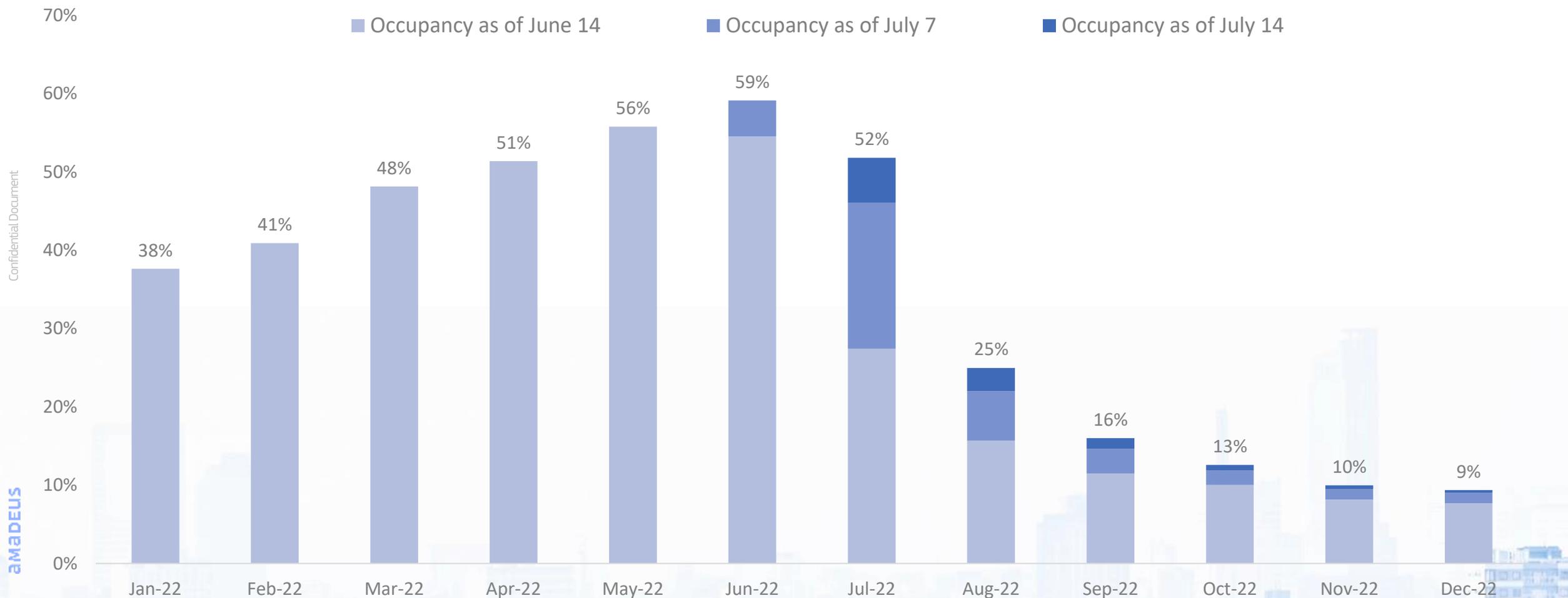


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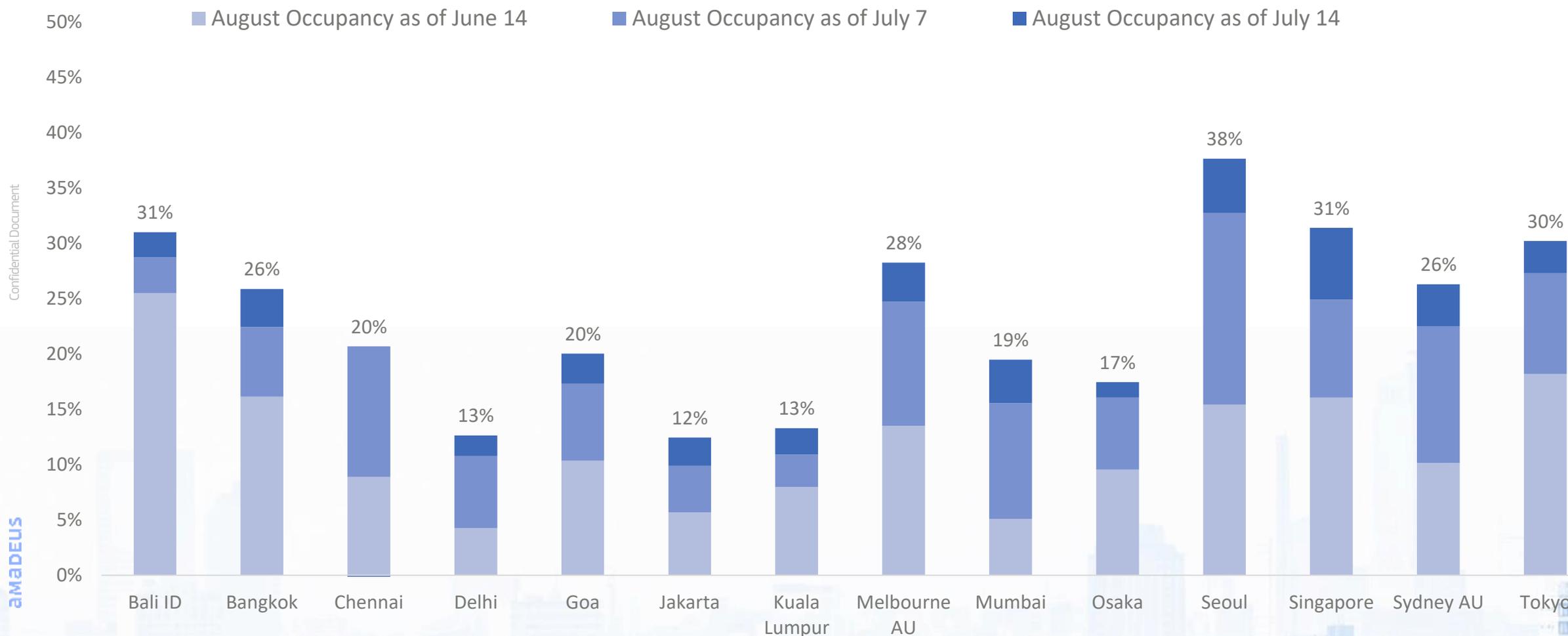
# Monthly Occupancy & Pace | Rest of Asia Pacific

Occupancy and pace by month since mid-June.



# Occupancy by Market & Pace | Rest of Asia Pacific

Pace by market for August 2022 since mid-June.

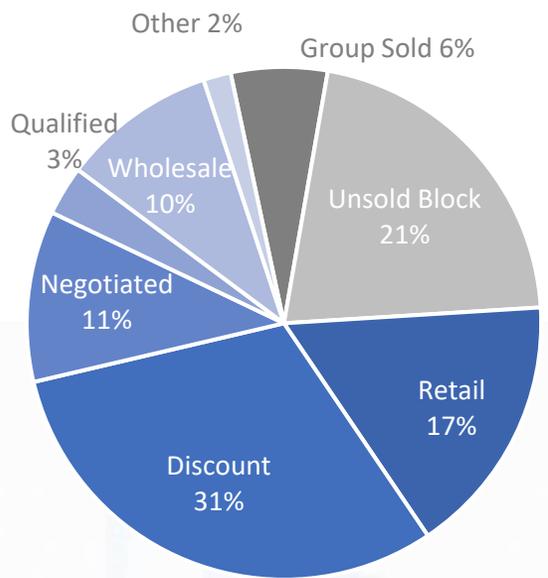


# Year-on-Year Segmentation | Rest of Asia Pacific

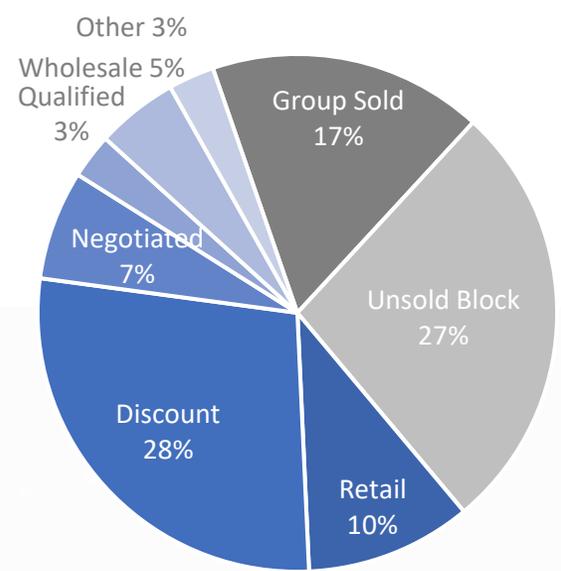
Market segmentation mix for August 2022 on-the-books vs same time August 2021, 2020, and 2019.

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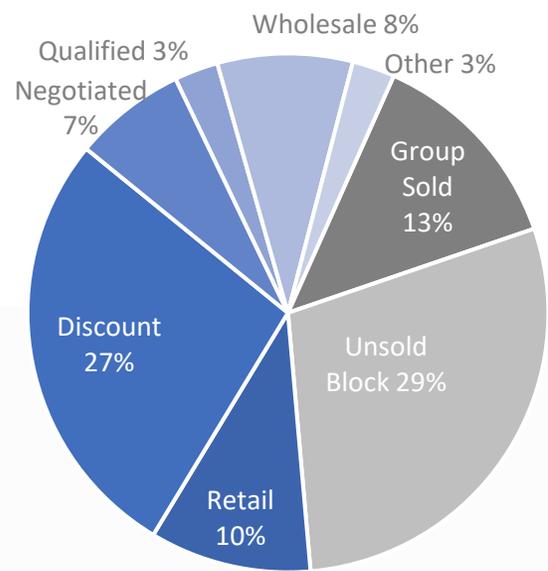
### 2022



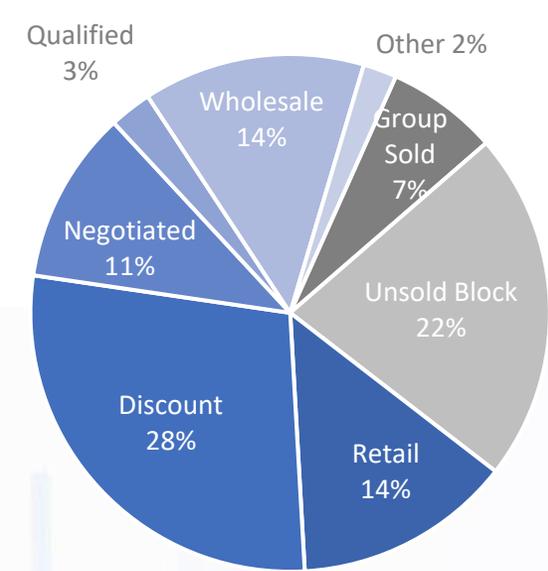
### 2021



### 2020



### 2019

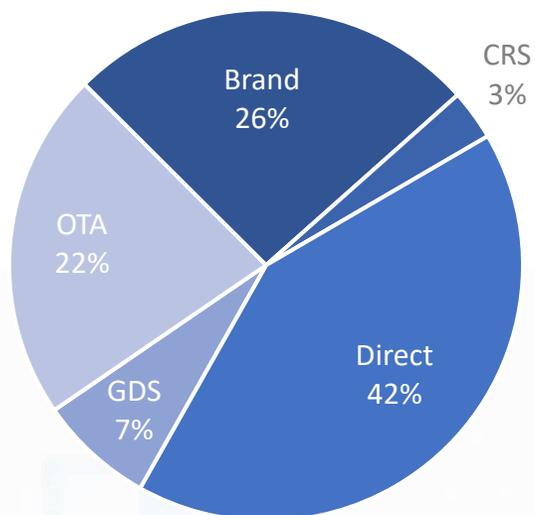


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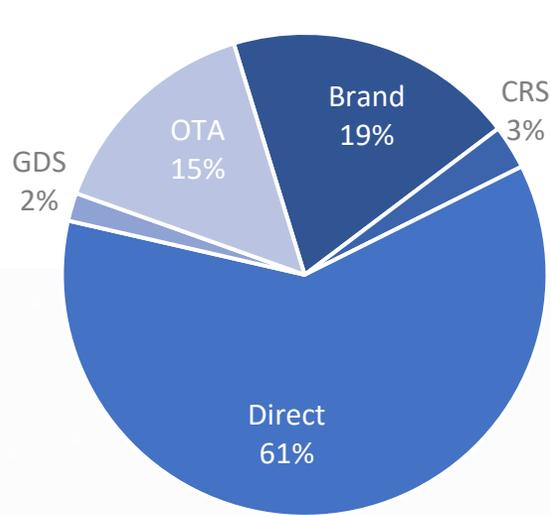
# Year-on-Year Channel Mix | Rest of Asia Pacific

Distribution channel mix for August 2022 on-the-books vs same time August 2021, 2020, and 2019.

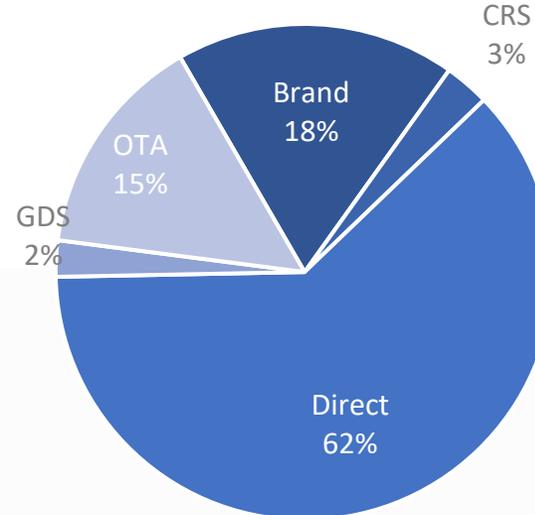
## 2022



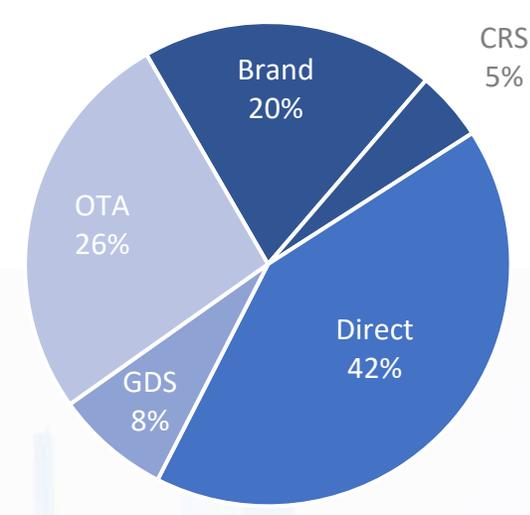
## 2021



## 2020



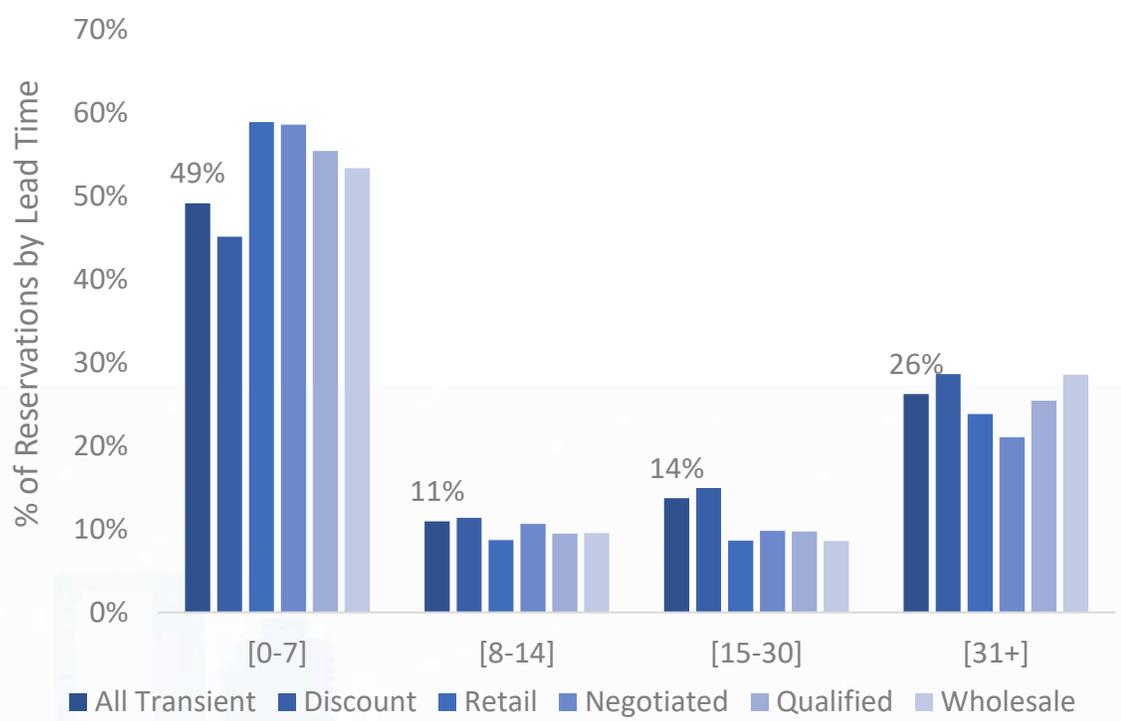
## 2019



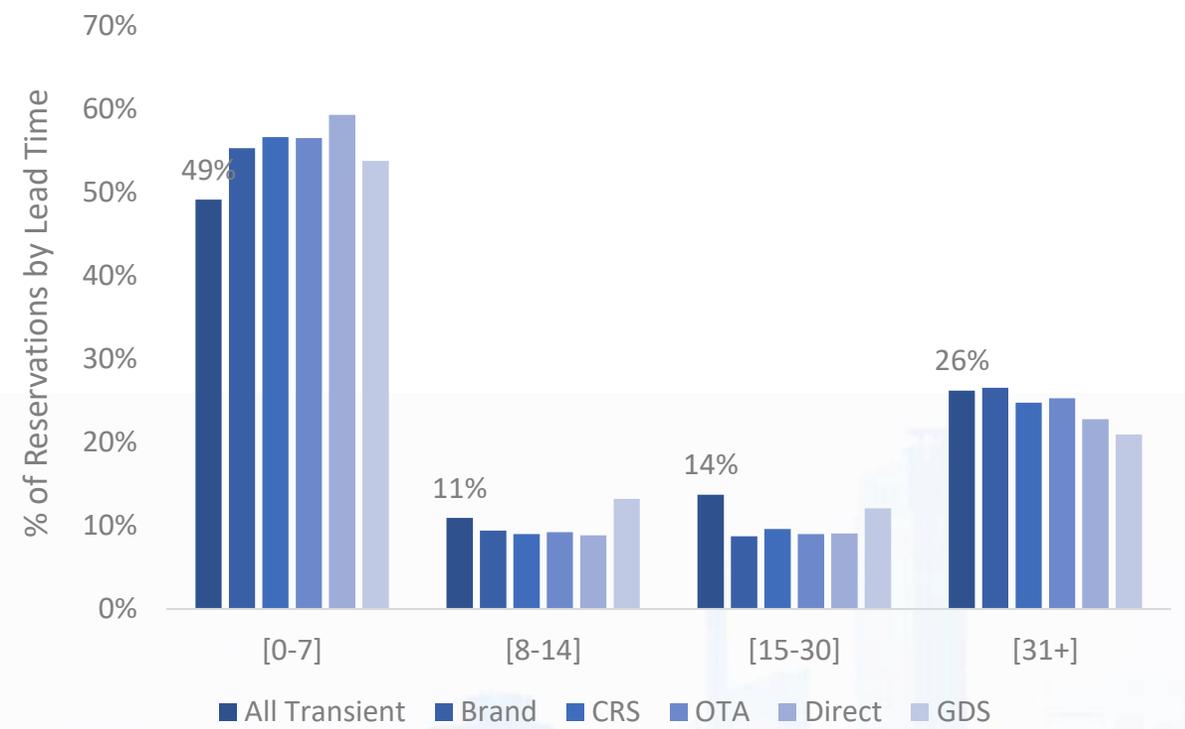
# Transient Lead Time by Segment & Channel | Rest of Asia Pacific

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

### Lead Time by Segment



### Lead Time by Channel



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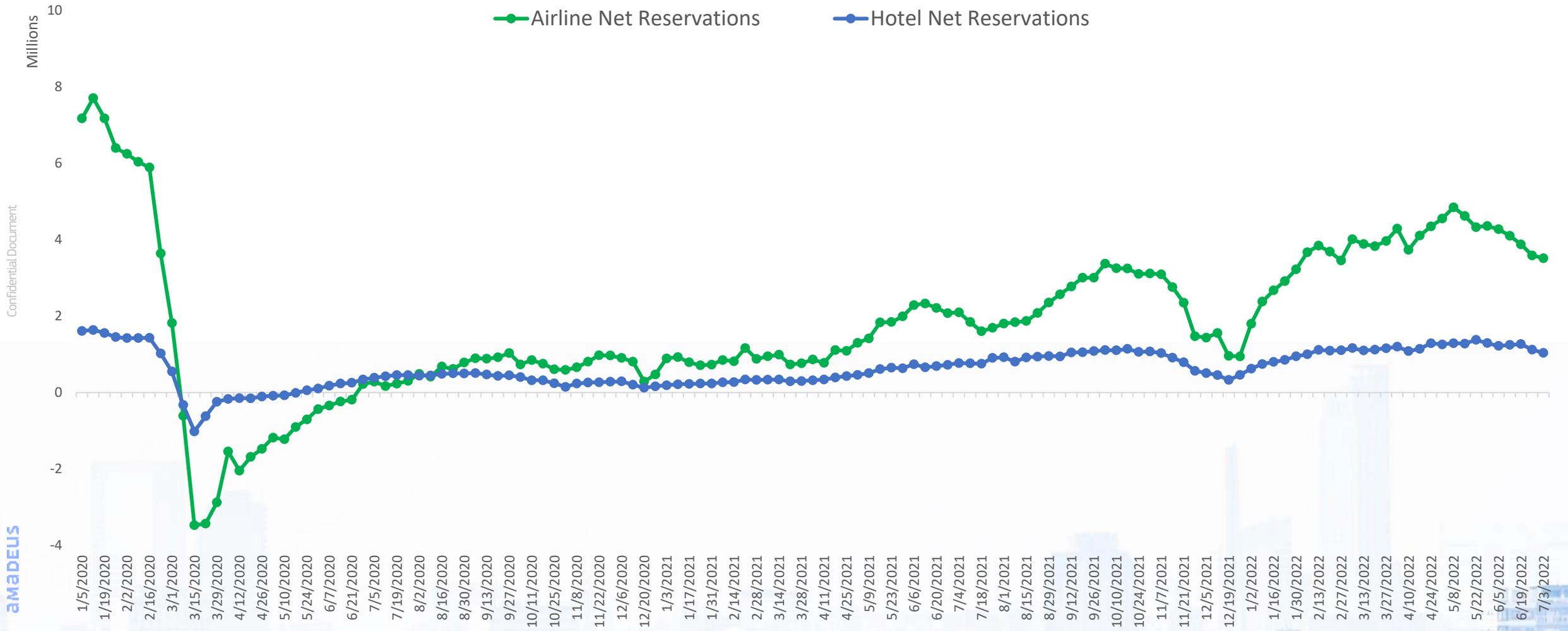
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Europe

# Airline & Hotel Net Reservations | Europe

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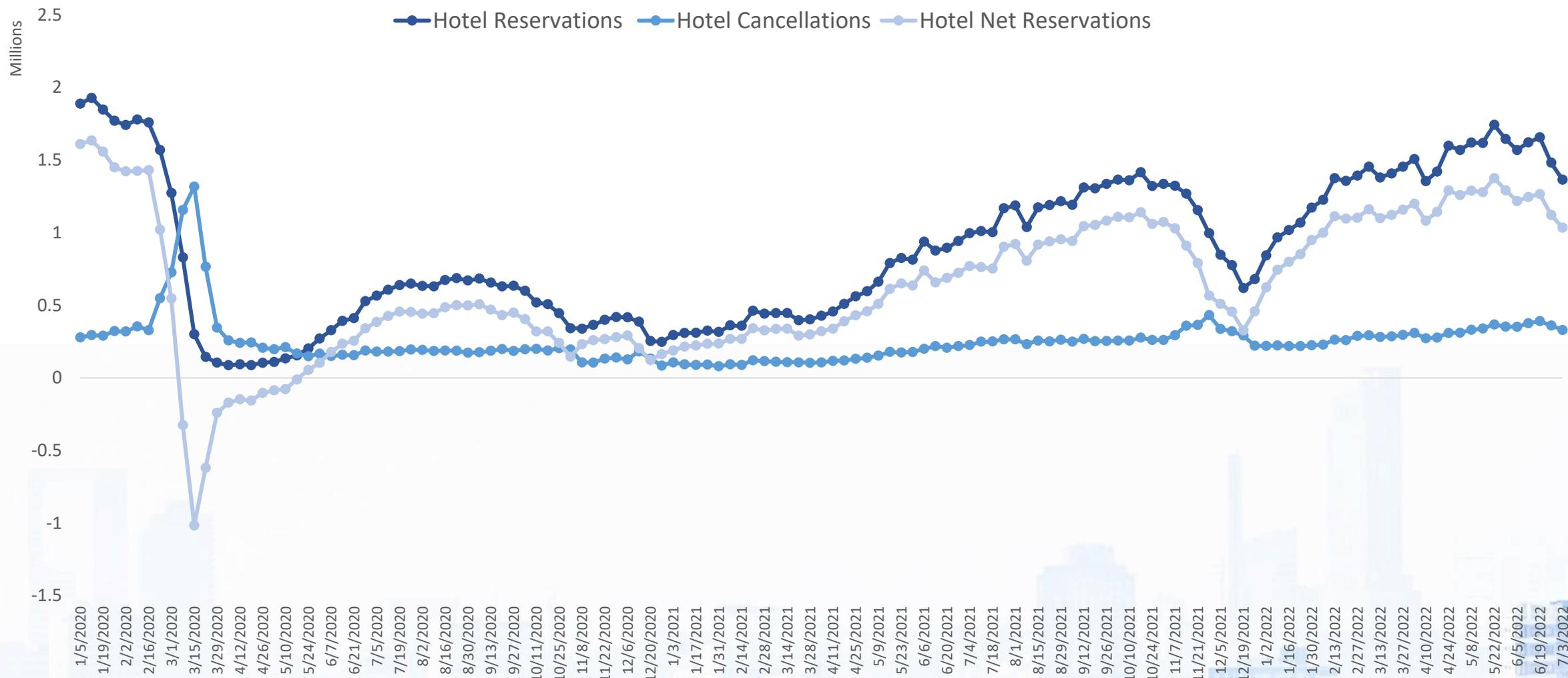


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Source: Amadeus Demand360® and GDS Airline Booking Data (MIDT) data as of July 7, 2022

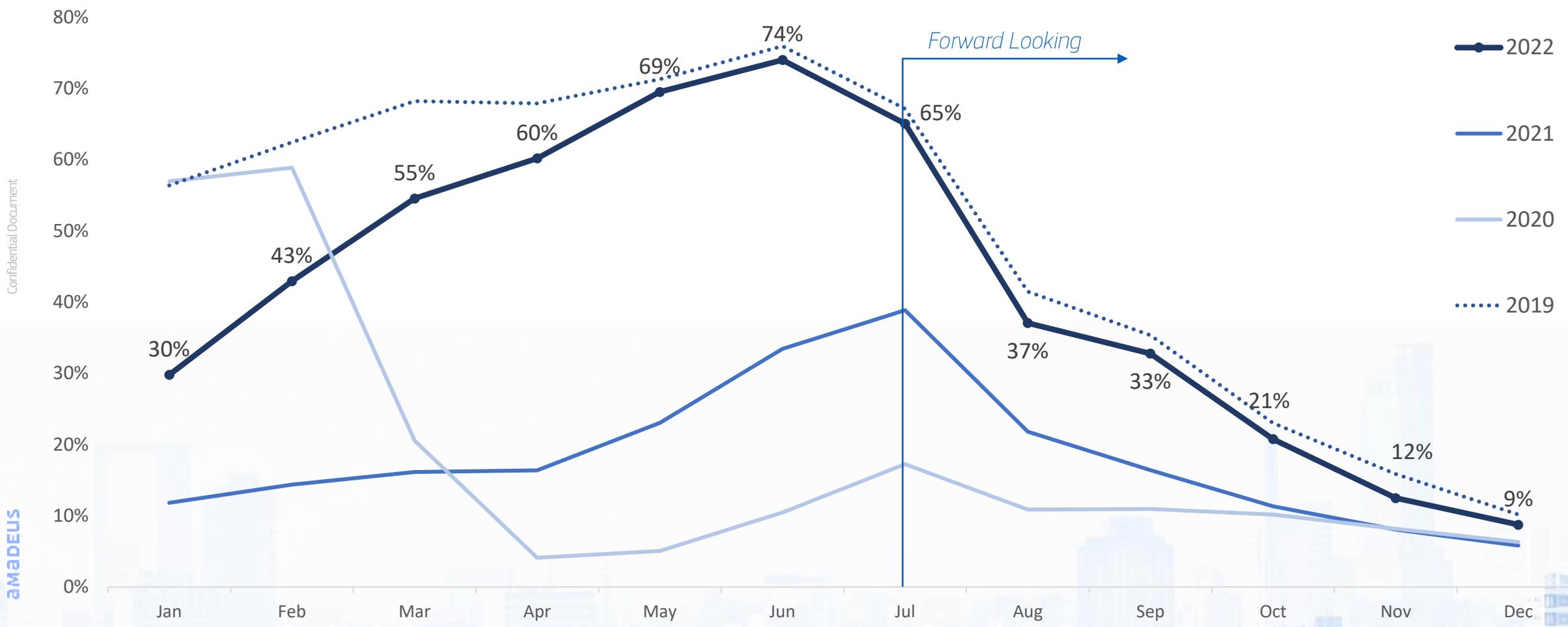
# Weekly Hotel Reservation Activity | Europe

Total reservations activity with cancellations and net trends.



# Monthly Occupancy & Year-on-Year Variance | Europe

On-the-books occupancy by month compared to last three years.

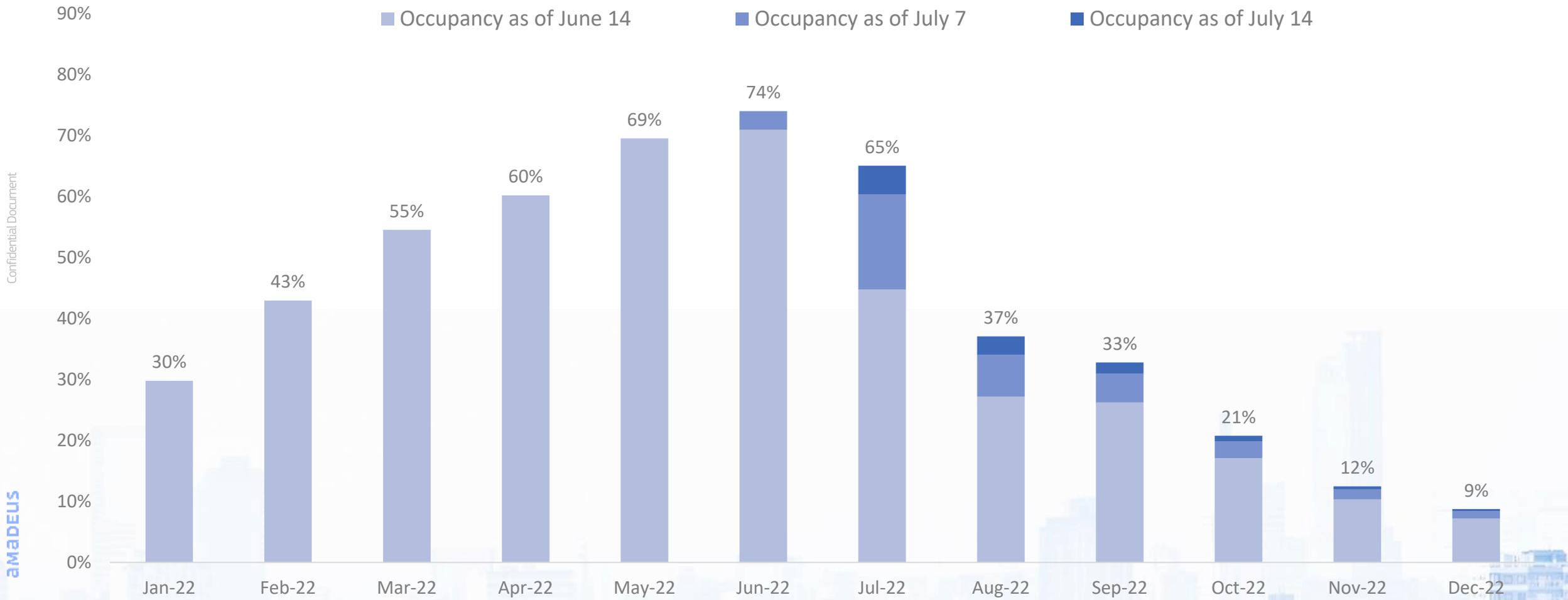


Source: Amadeus Demand360® data as of July 14, 2022

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# Monthly Occupancy & Pace | Europe

Occupancy and pace by month since mid-June.

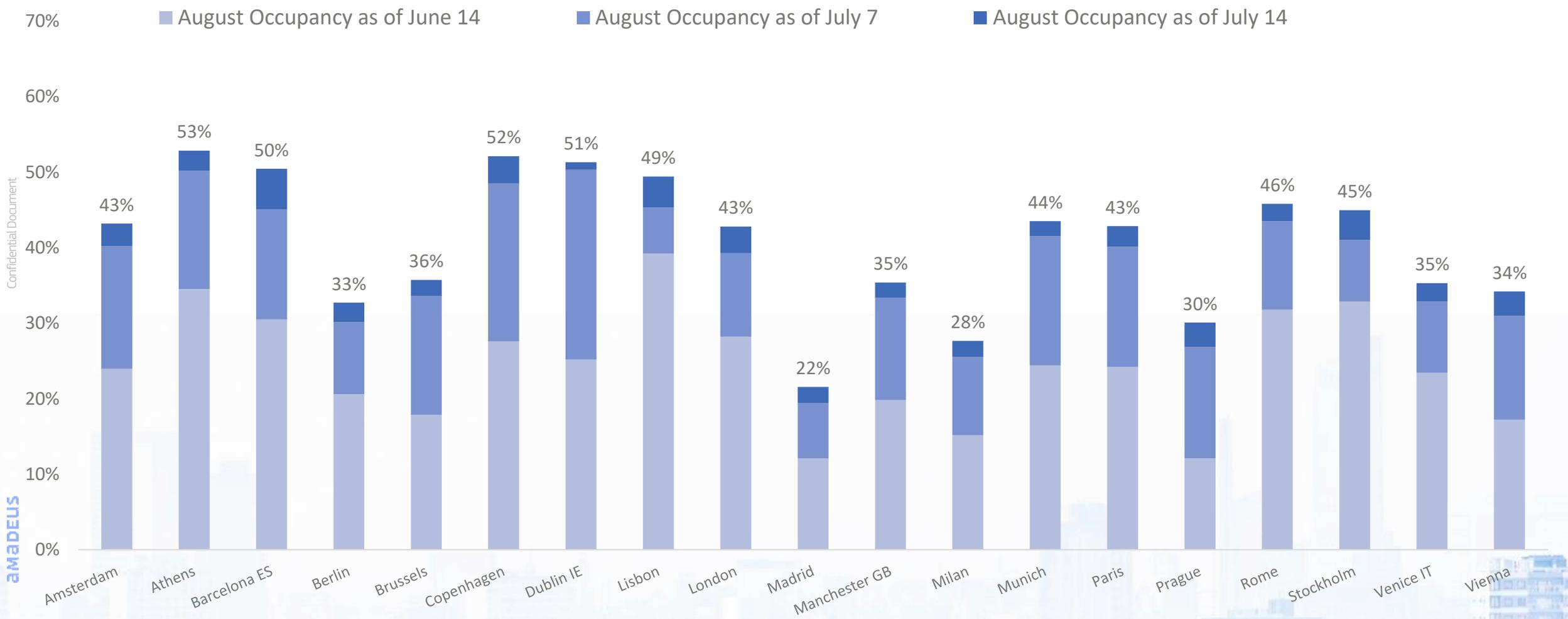


Source: Amadeus Demand360® data as of July 14, 2022

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# Occupancy by Market & Pace | Europe

Pace by market for August 2022 since mid-June.



Source: Amadeus Demand360® data as of July 14, 2022

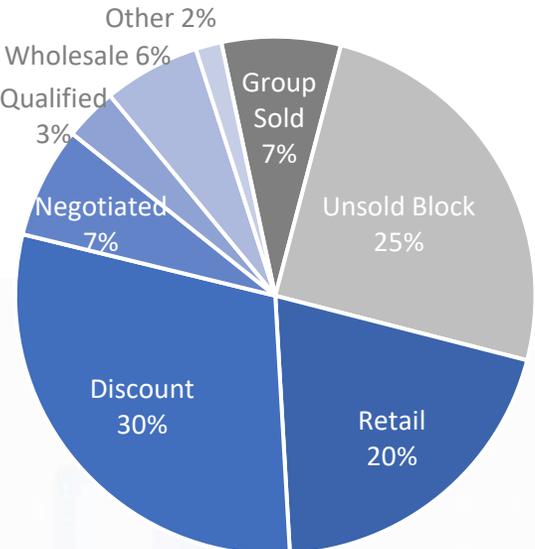
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# Year-on-Year Segmentation | Europe

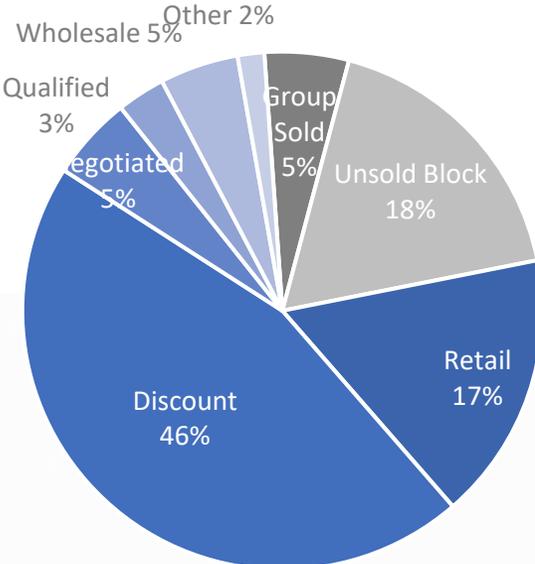
Market segmentation mix for August 2022 on-the-books vs same time August 2021, 2020, and 2019.

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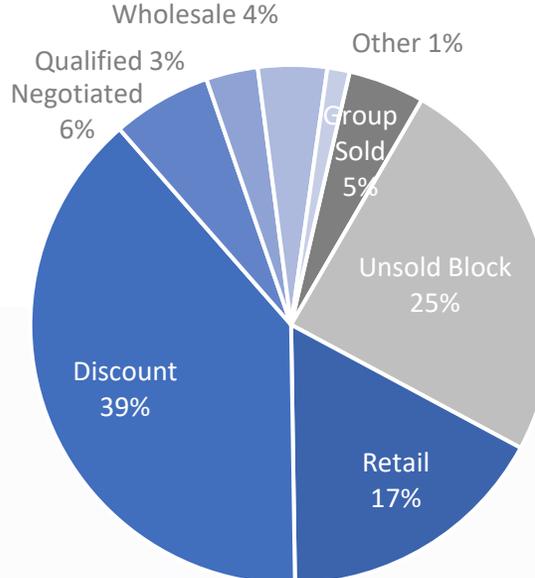
### 2022



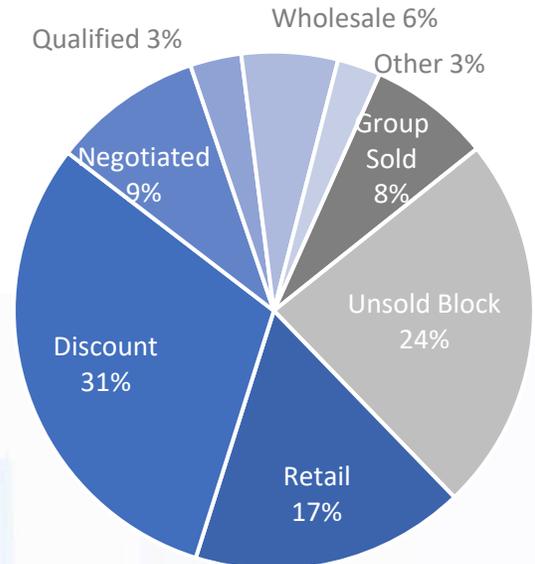
### 2021



### 2020



### 2019



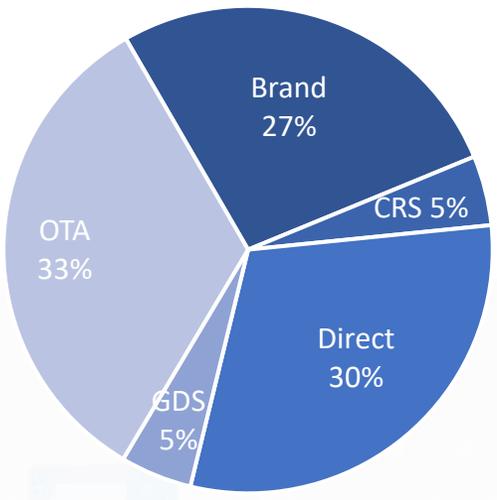
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# Year-on-Year Channel Mix | Europe

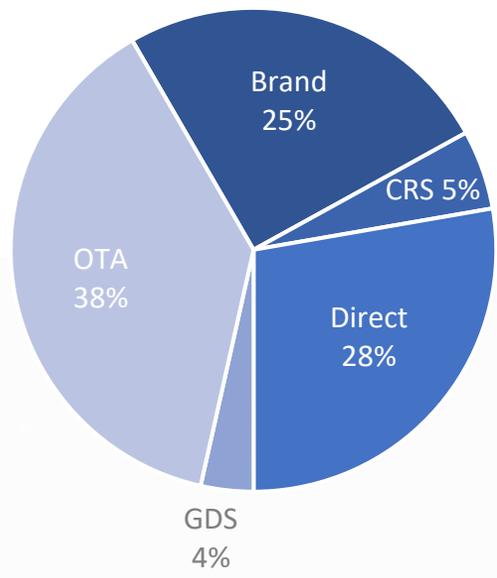
Distribution channel mix for August 2022 on-the-books vs same time August 2021, 2020, and 2019.

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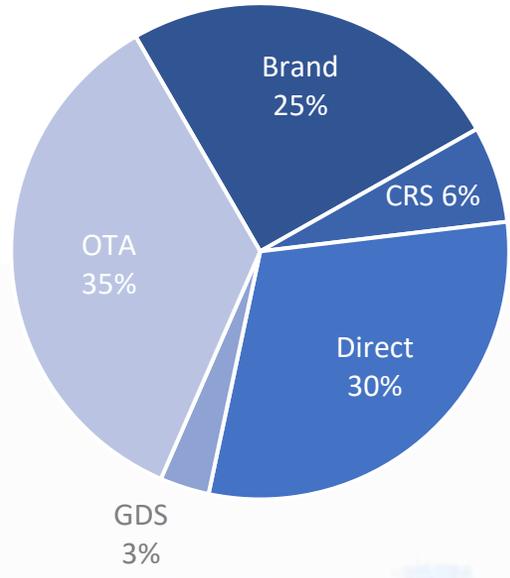
**2022**



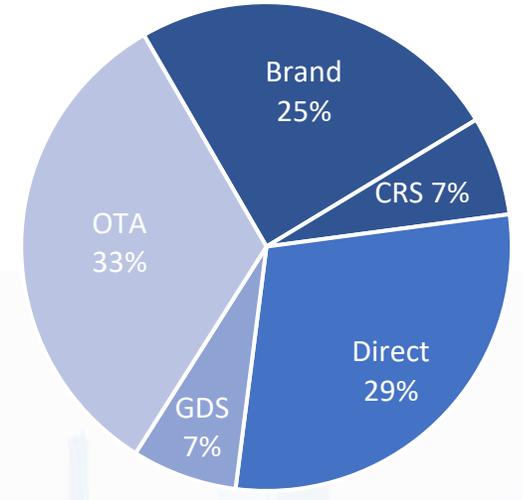
**2021**



**2020**



**2019**



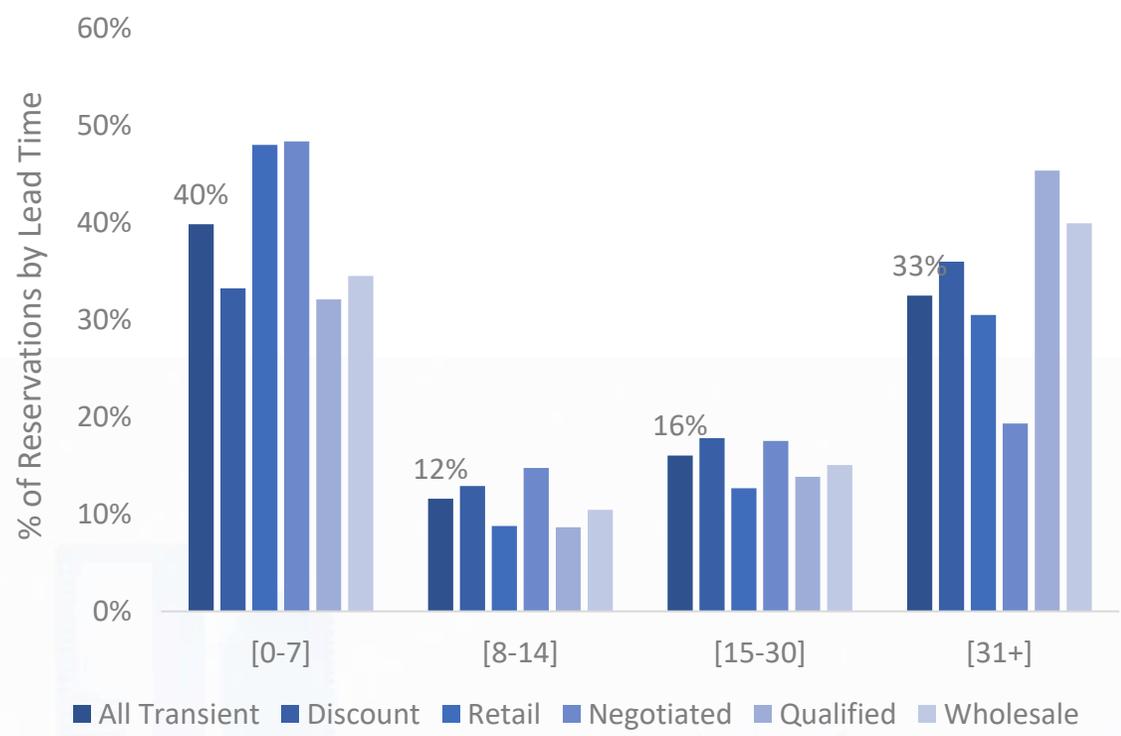
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# Transient Lead Time by Segment & Channel | Europe

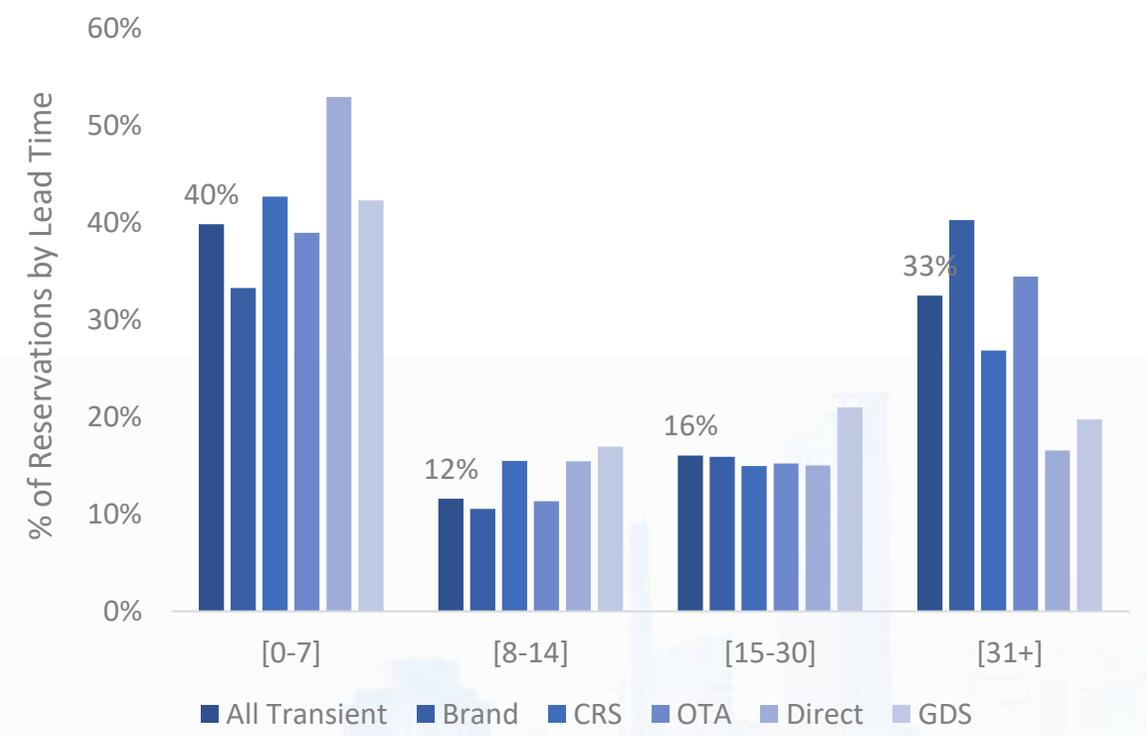
Percentage of transient reservations booked by lead time bucket based on the previous 5 weeks of booking activity.

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### Lead Time by Segment



### Lead Time by Channel



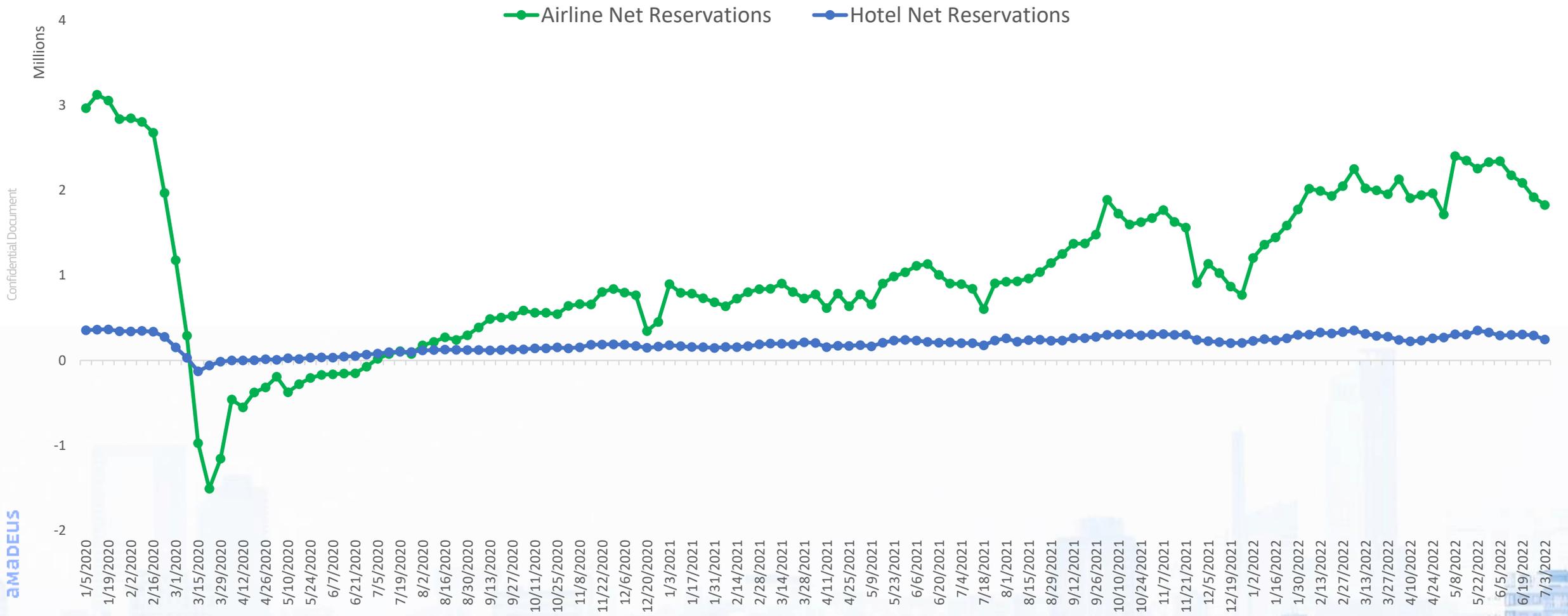
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# Middle East & Africa



# Airline & Hotel Net Reservations | Middle East & Africa

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

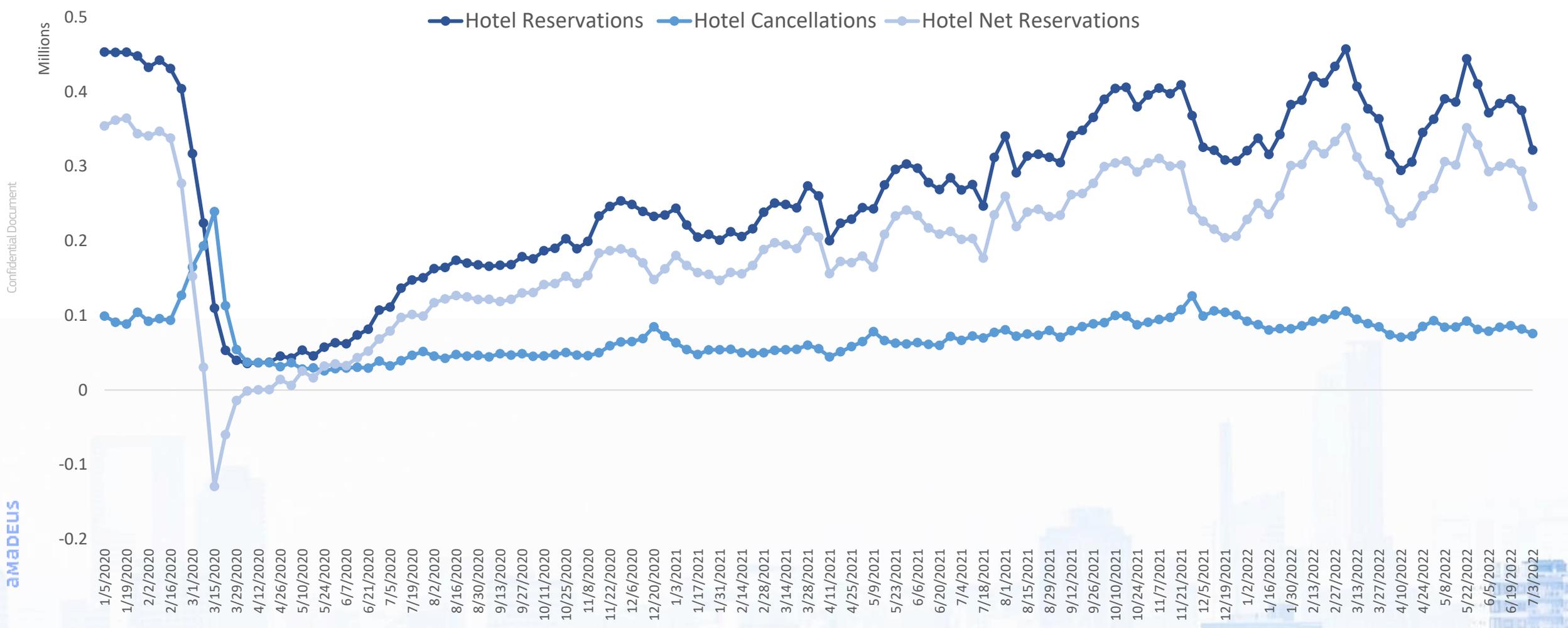


AMADEUS

Source: Amadeus Demand360® and GDS Airline Booking Data (MIDT) data as of July 7, 2022

# Weekly Hotel Reservation Activity | Middle East & Africa

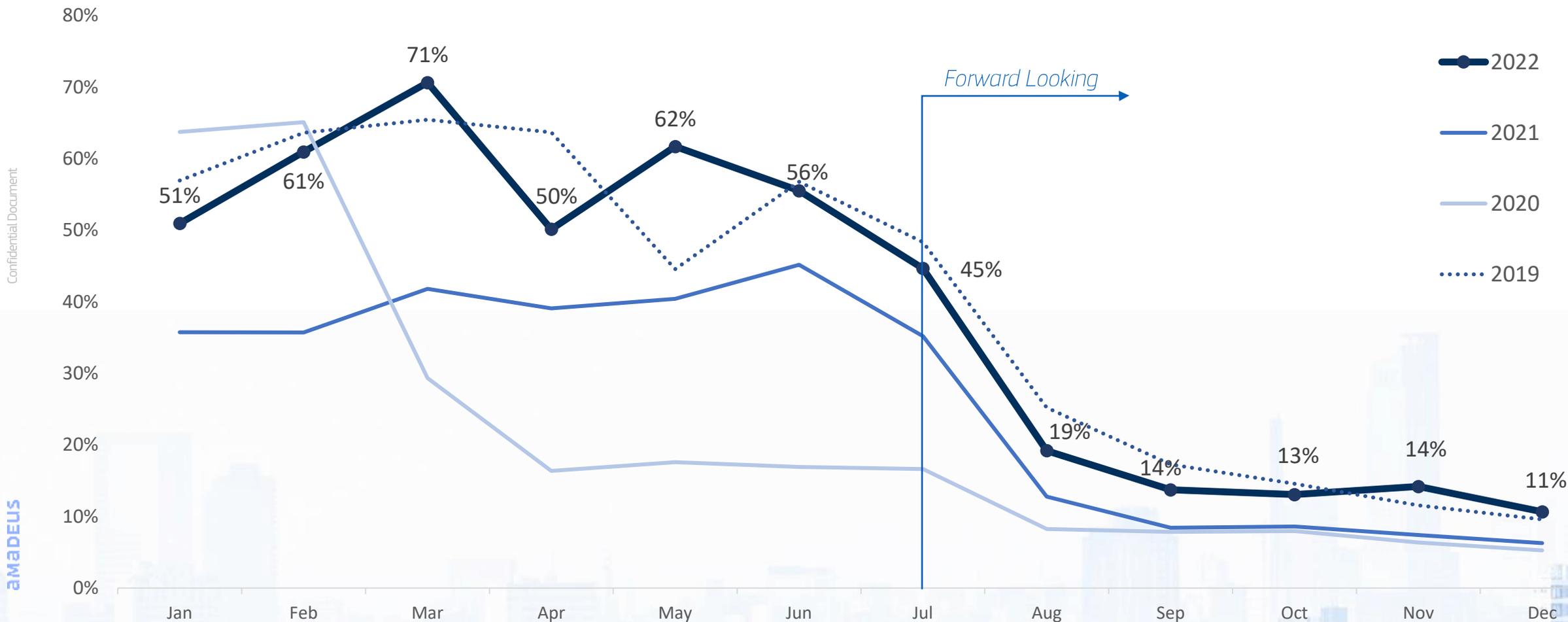
Total reservations activity with cancellations and net trends.



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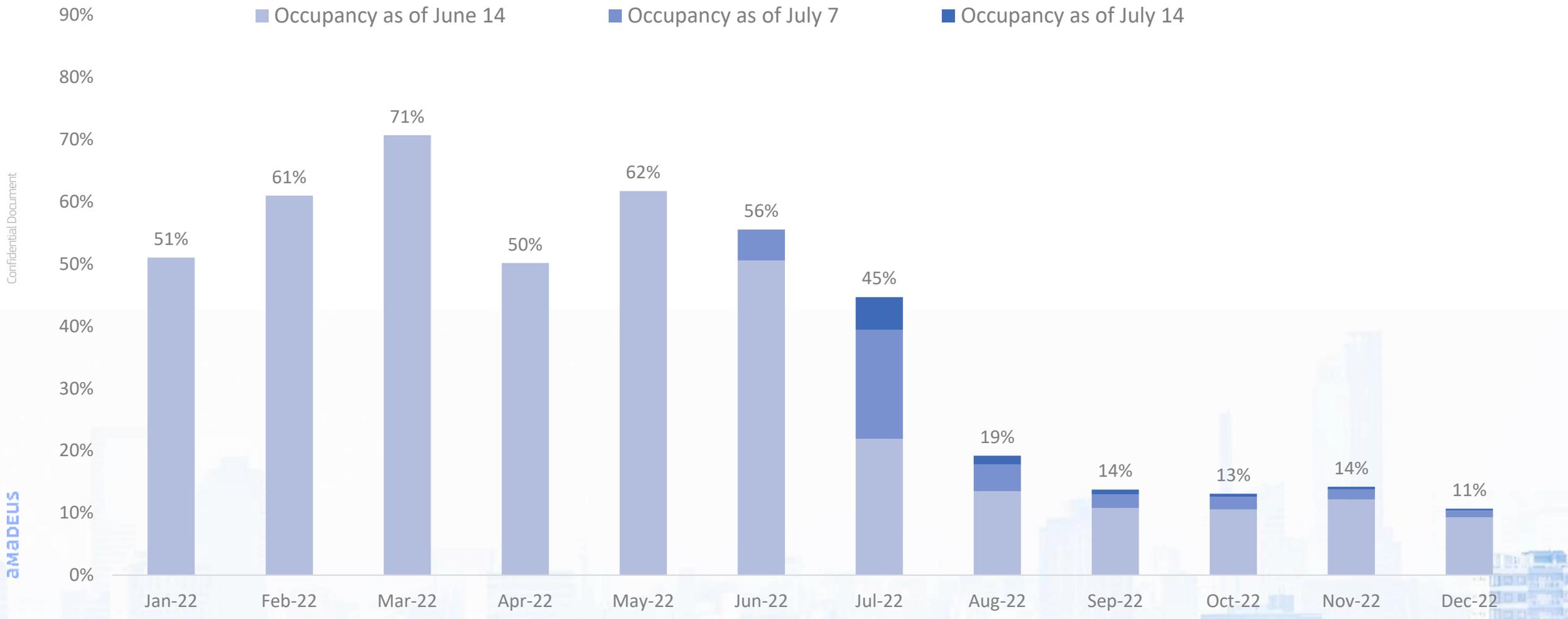
# Monthly Occupancy & Year-on-Year Variance | Middle East & Africa

On-the-books occupancy by month compared to last three years.



# Monthly Occupancy & Pace | Middle East & Africa

Occupancy and pace by month since mid-June.

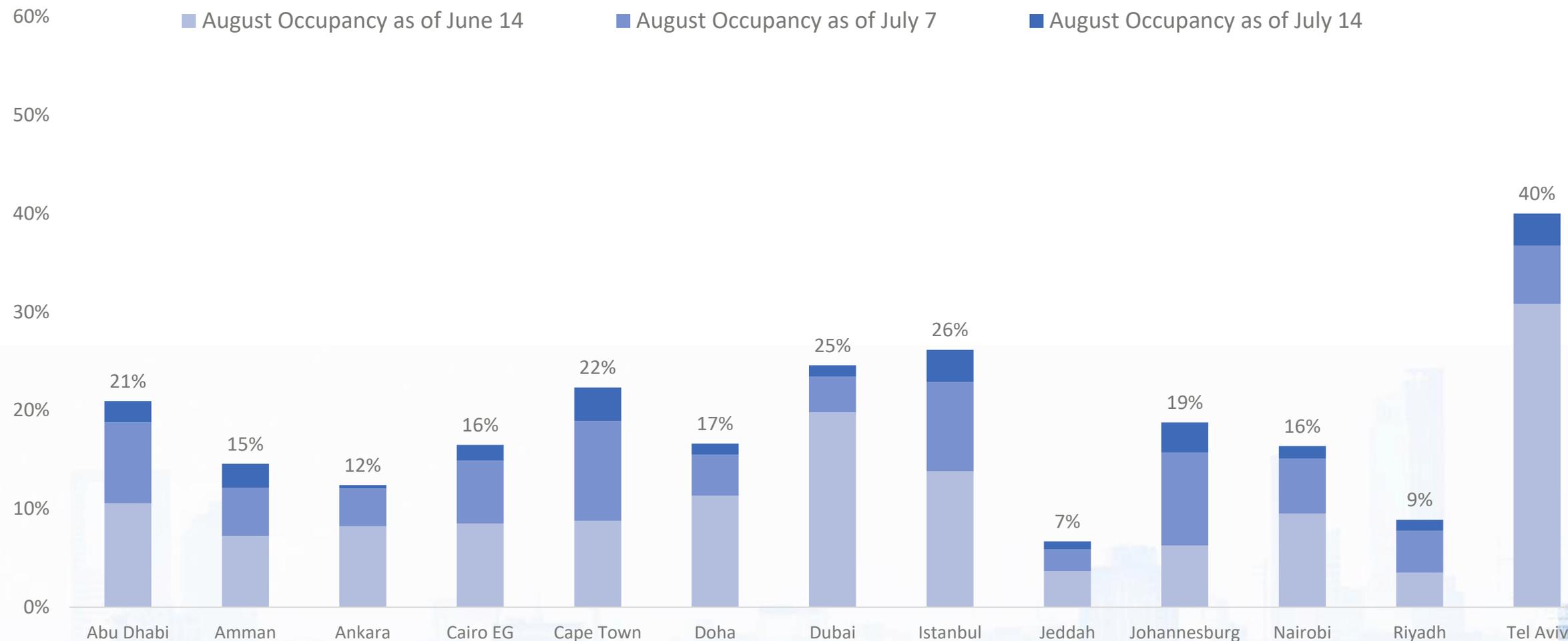


Source: Amadeus Demand360® data as of July 14, 2022

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# Occupancy by Market & Pace | Middle East & Africa

Pace by market for August 2022 since mid-June.

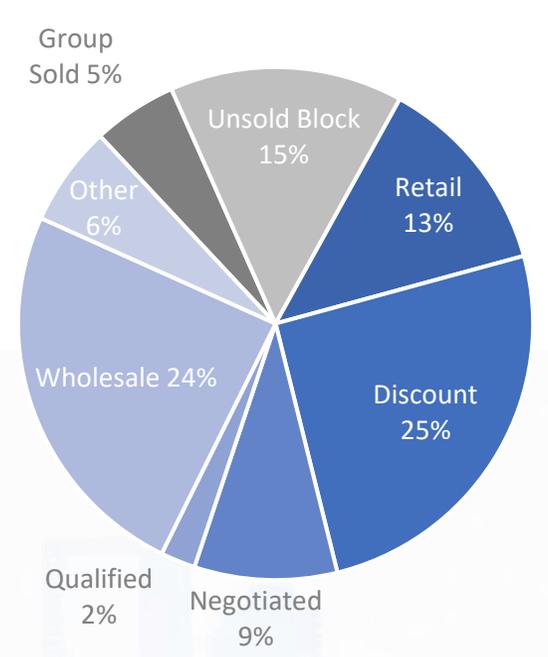


# Year-on-Year Segmentation | Middle East & Africa

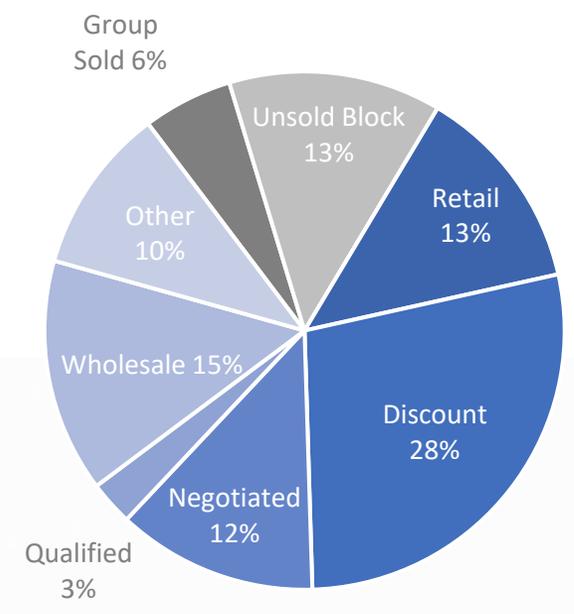
Market segmentation mix for August 2022 on-the-books vs same time August 2021, 2020, and 2019.

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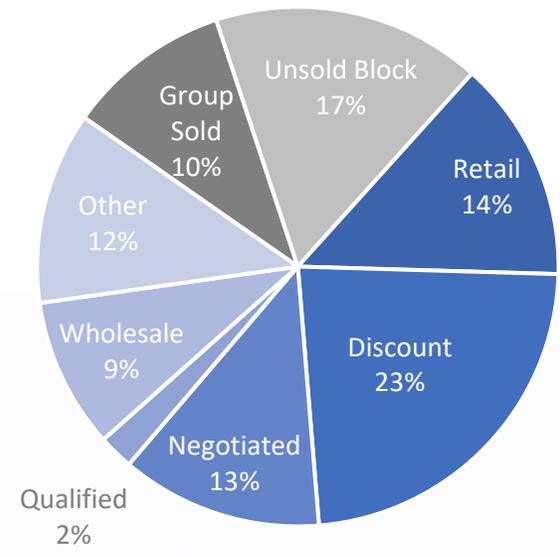
### 2022



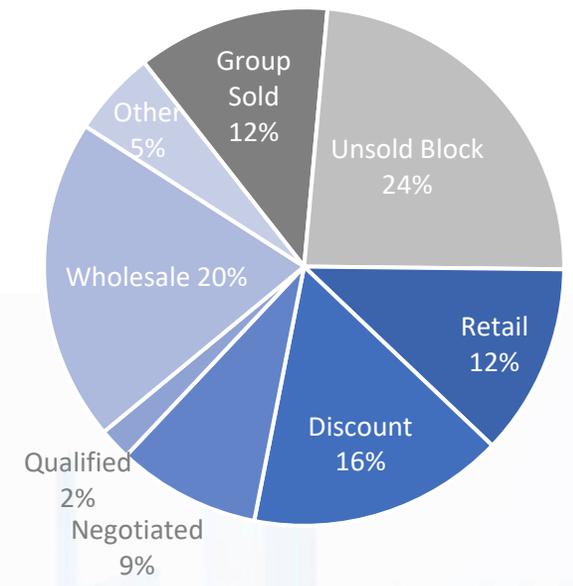
### 2021



### 2020



### 2019



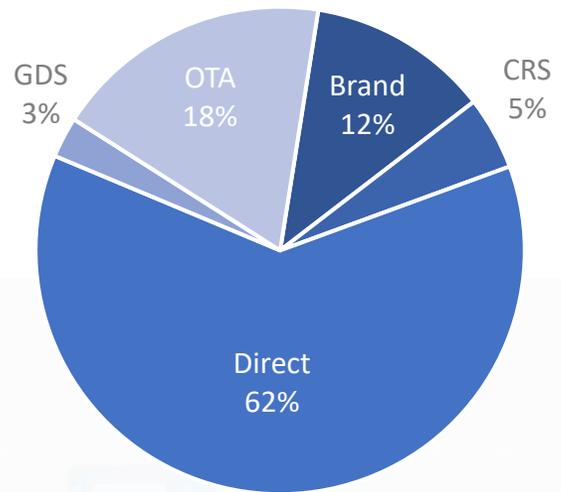
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# Year-on-Year Channel Mix | Middle East & Africa

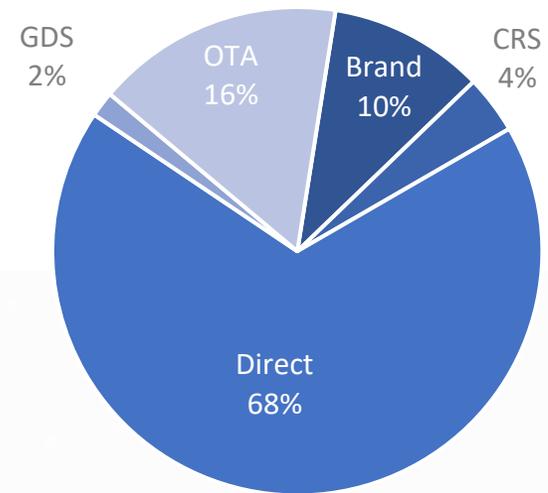
Distribution channel mix for August 2022 on-the-books same time August 2021, 2020, and 2019.

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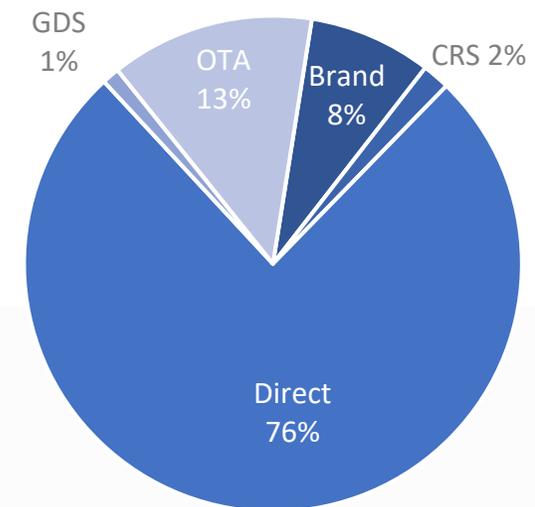
**2022**



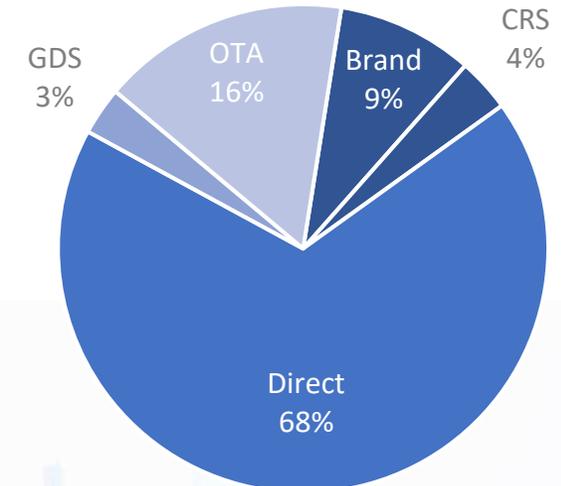
**2021**



**2020**



**2019**



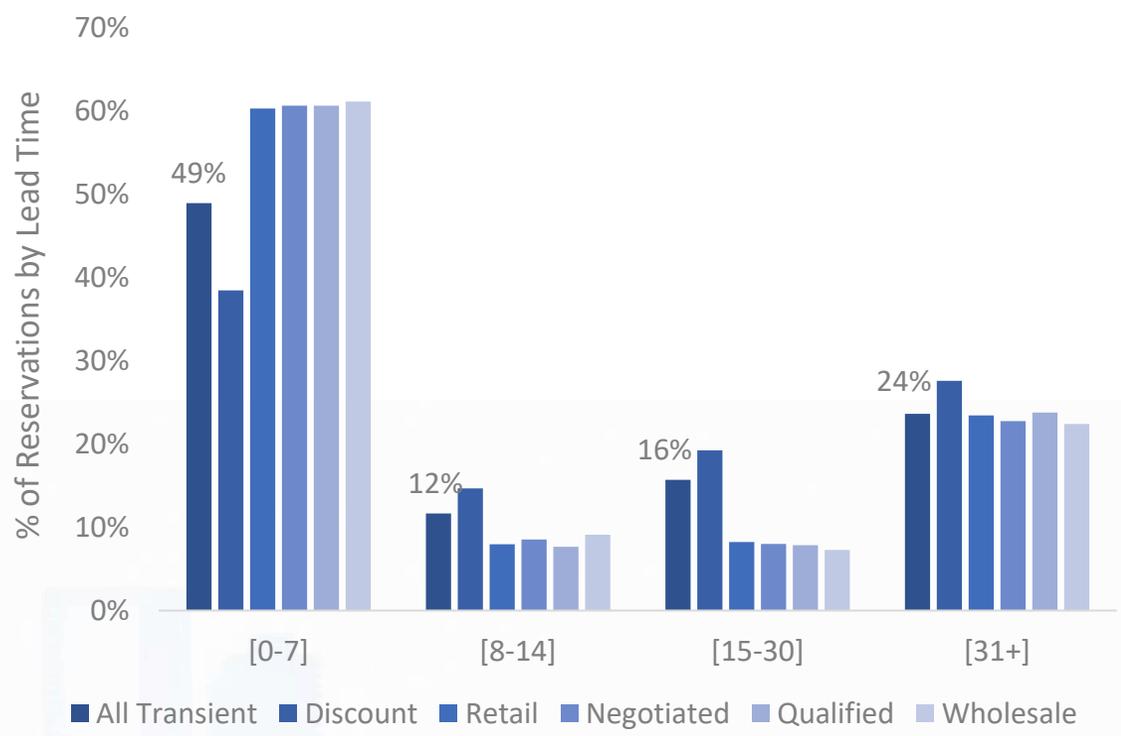
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# Transient Lead Time by Segment & Channel | Middle East & Africa

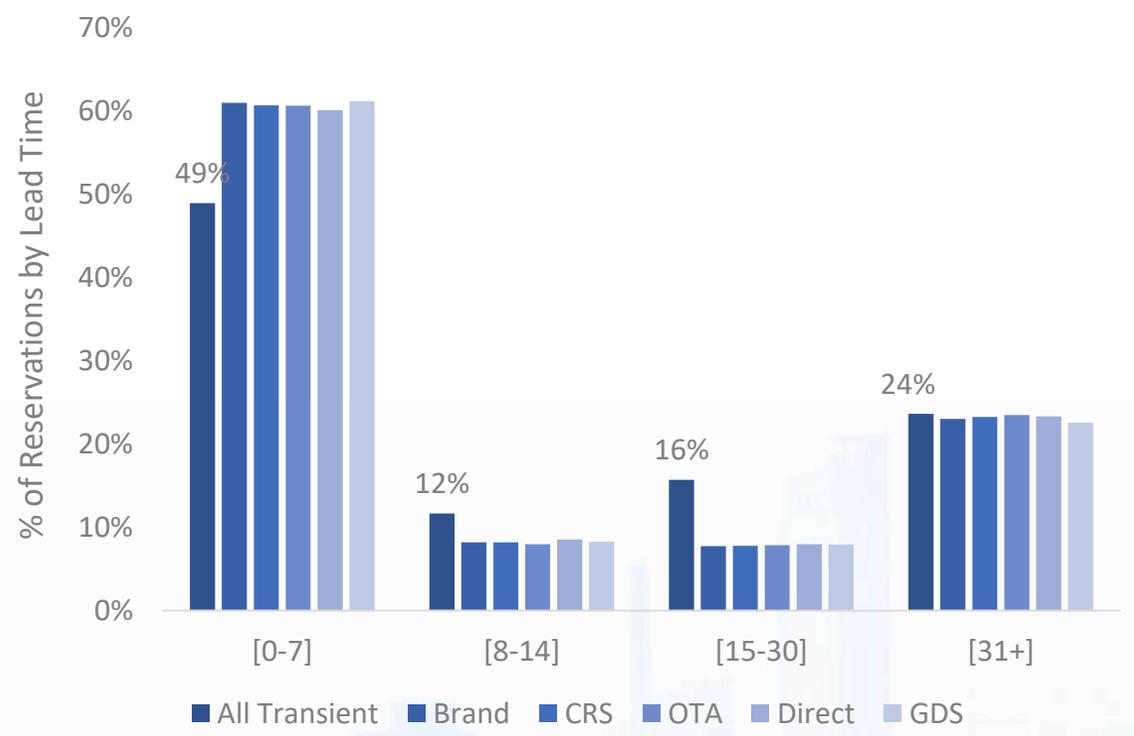
Percentage of transient reservations booked by lead time bucket based on the previous 5 weeks of booking activity.

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### Lead Time by Segment



### Lead Time by Channel



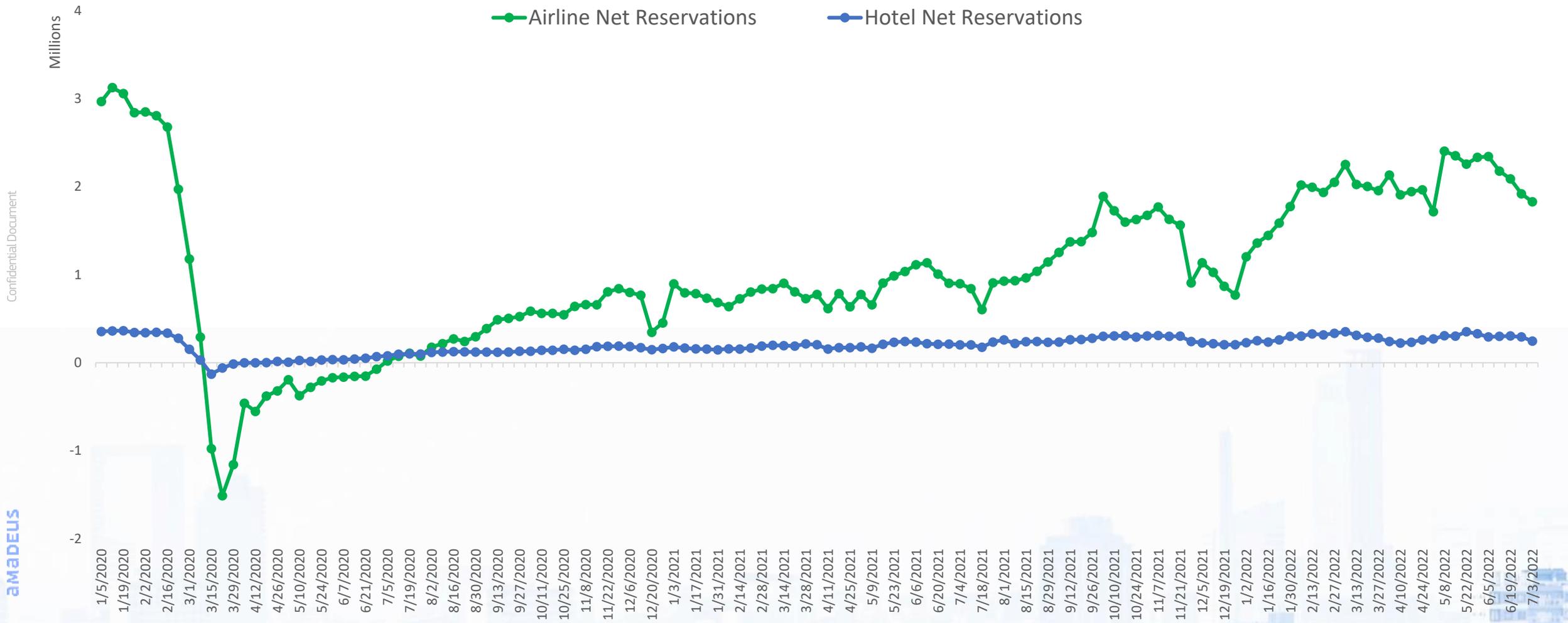
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Latin America

# Airline & Hotel Net Reservations | Latin America

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



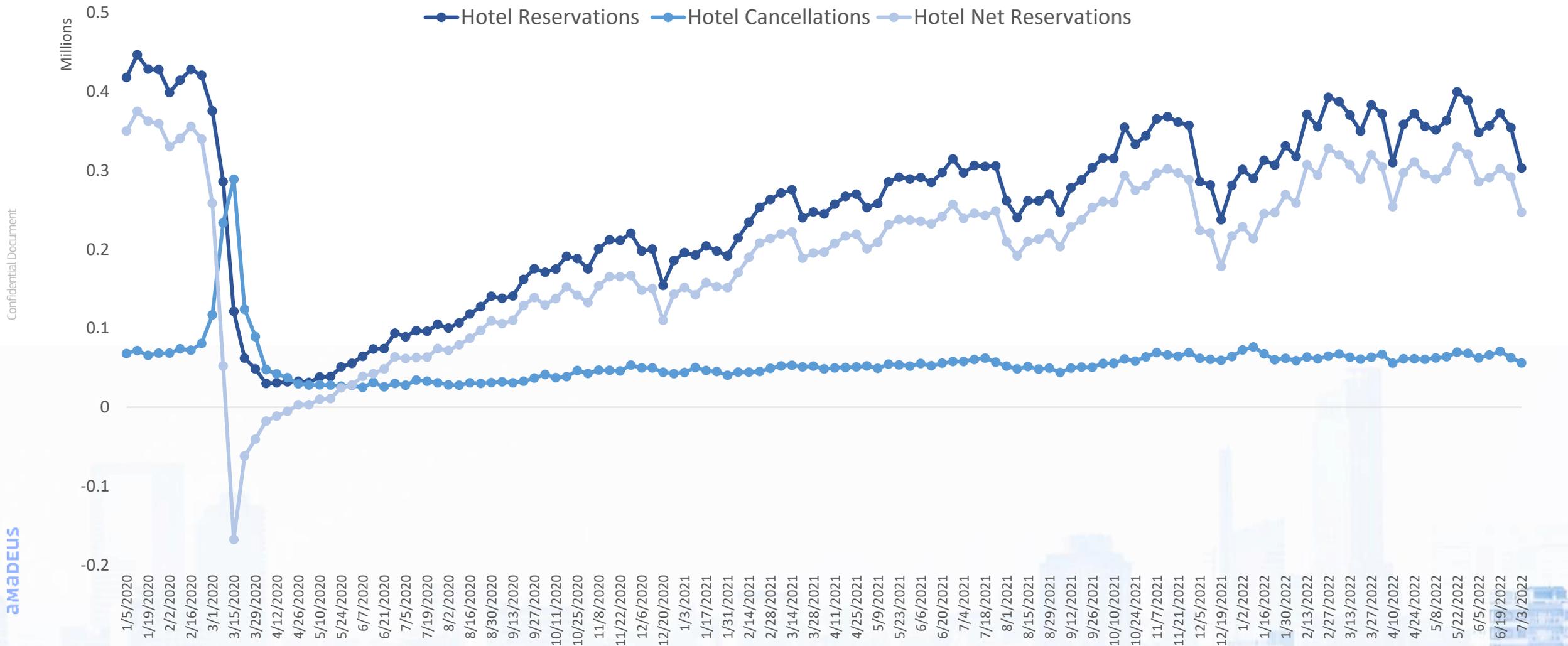
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Source: Amadeus Demand360® and GDS Airline Booking Data (MIDT) data as of July 7, 2022

# Weekly Hotel Reservation Activity | Latin America

Total reservations activity with cancellations and net trends.

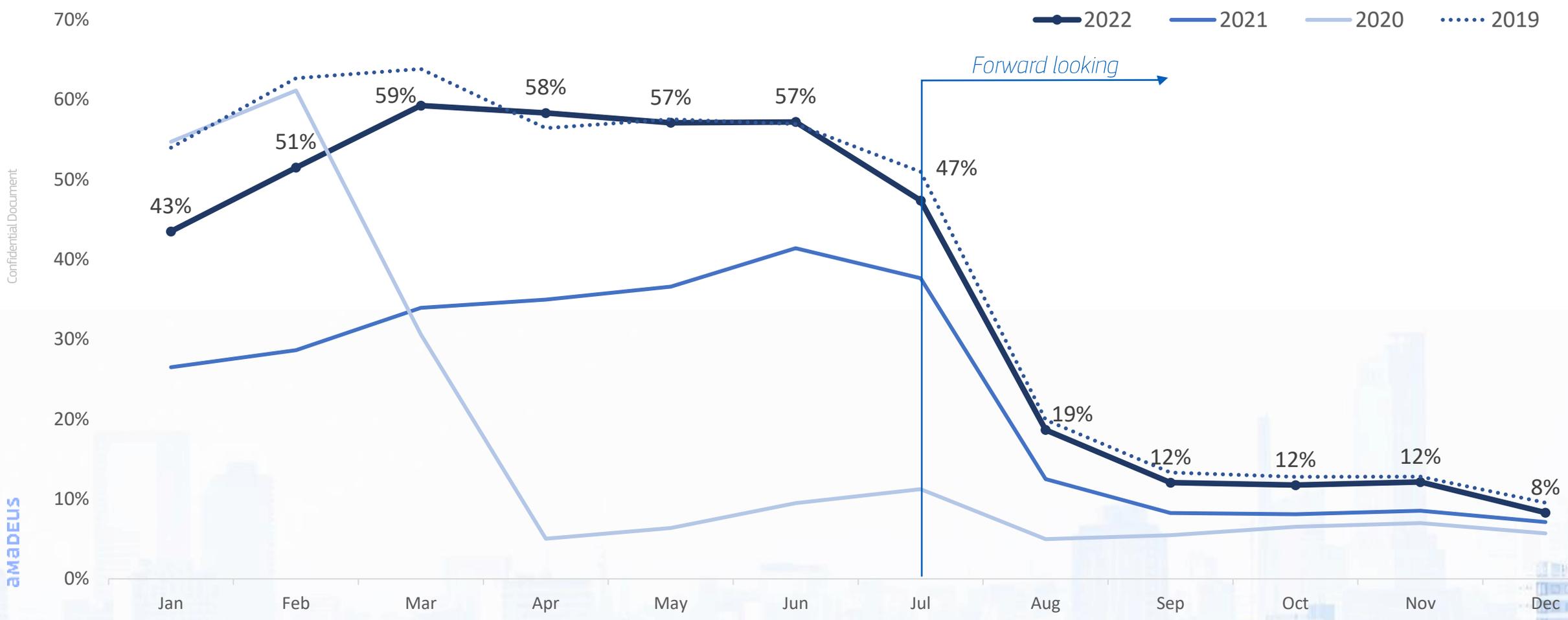


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# Monthly Occupancy & Year-on-Year Variance | Latin America

On-the-books occupancy by month compared to last three years.

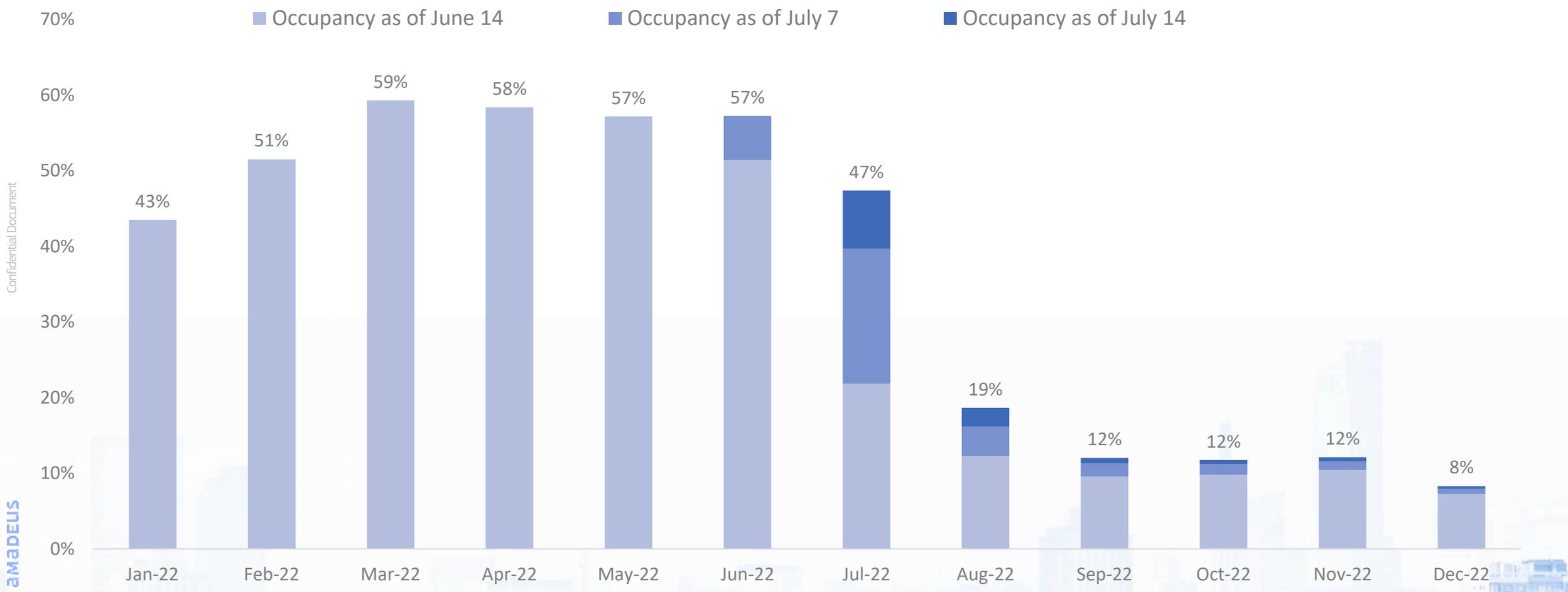


Source: Amadeus Demand360® data as of July 14, 2022

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# Monthly Occupancy & Pace | Latin America

Occupancy and pace by month since mid-June.

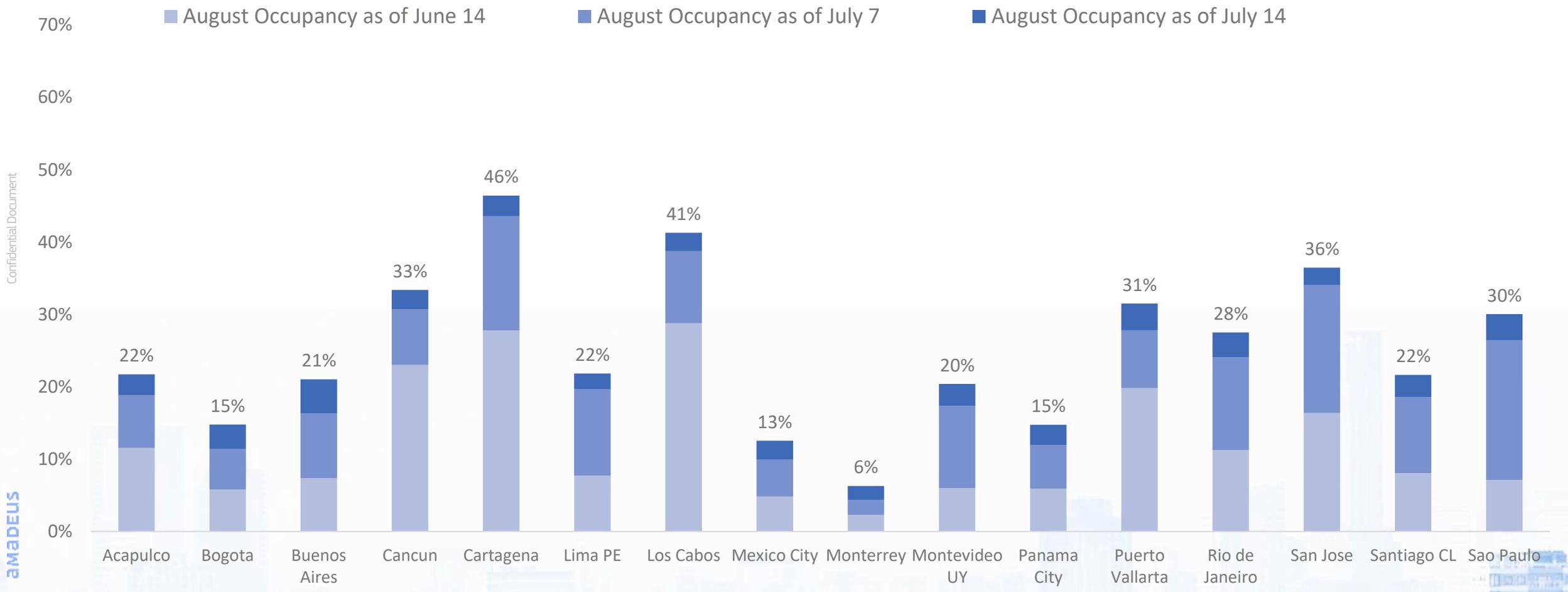


Source: Amadeus Demand360® data as of July 14, 2022

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# Occupancy by Market & Pace | Latin America

Pace by market for August 2022 since mid-June.



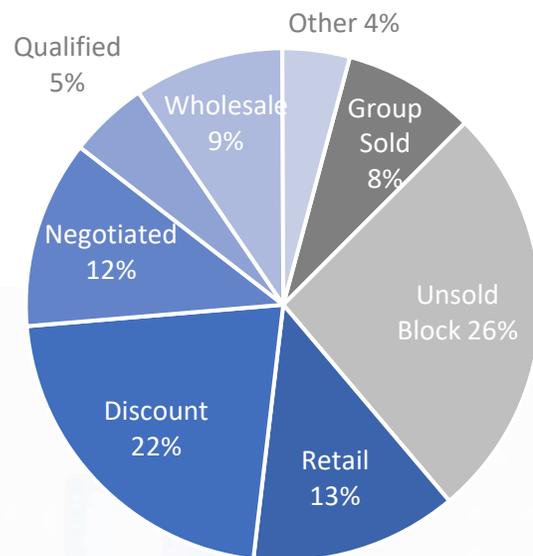
Source: Amadeus Demand360® data as of July 14, 2022

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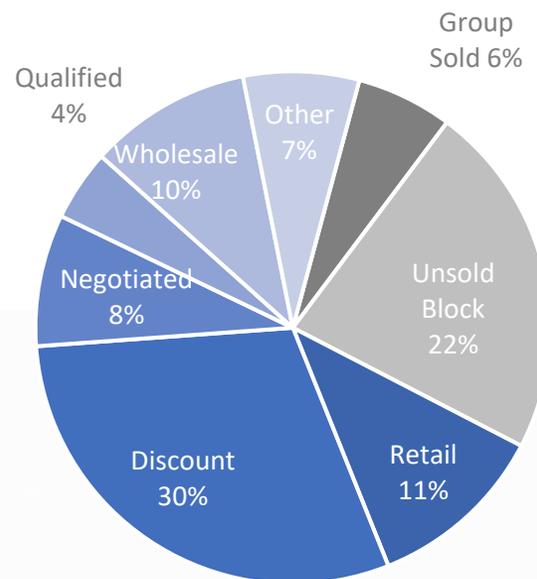
# Year-on-Year Segmentation | Latin America

Market segmentation mix for August 2022 on-the-books same time August 2021, 2020, and 2019.

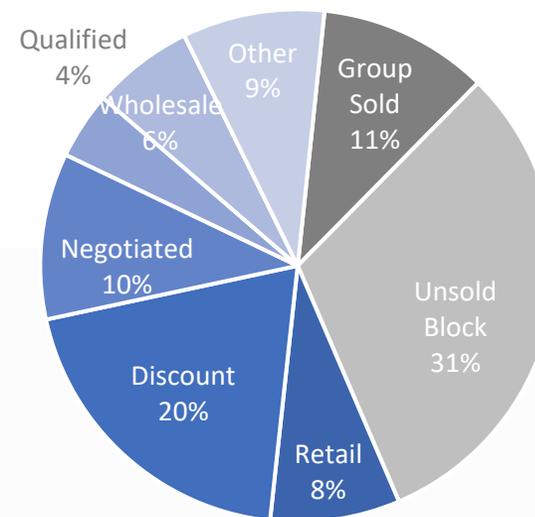
## 2022



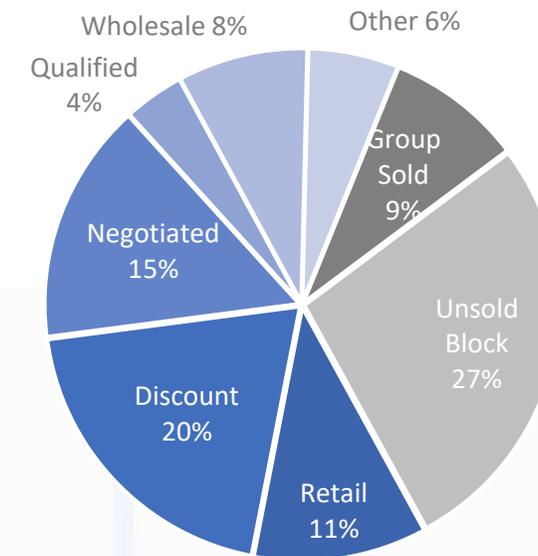
## 2021



## 2020



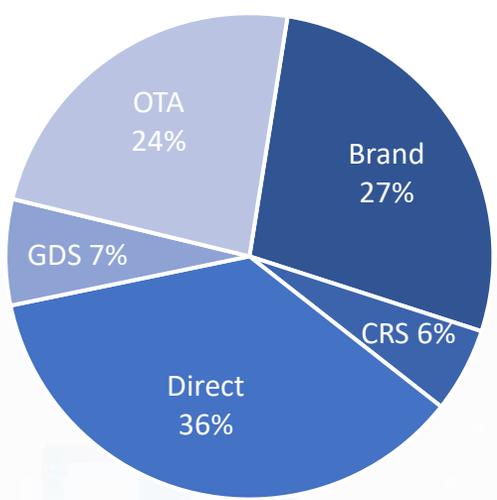
## 2019



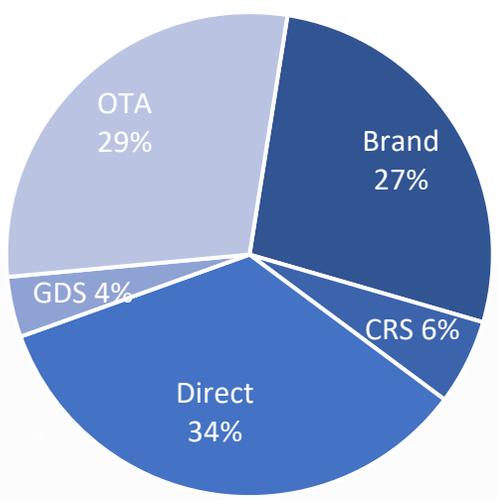
# Year-on-Year Channel Mix | Latin America

Distribution channel mix for August 2022 on-the-books vs same time August 2021, 2020, and 2019.

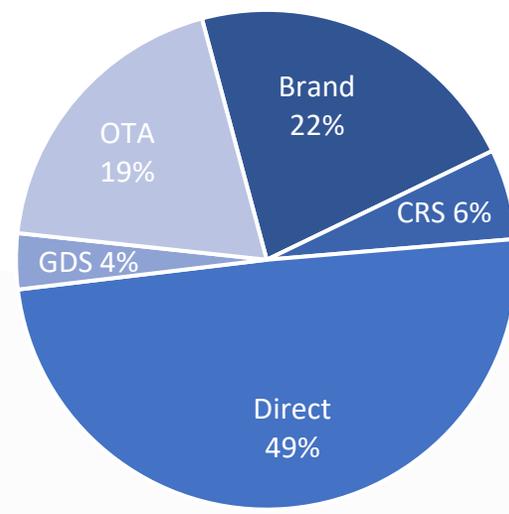
**2022**



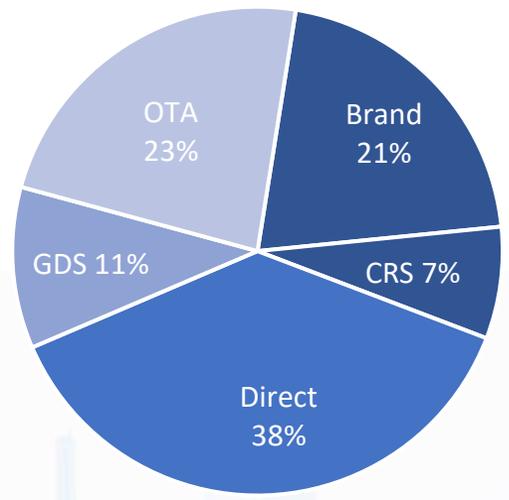
**2021**



**2020**



**2019**



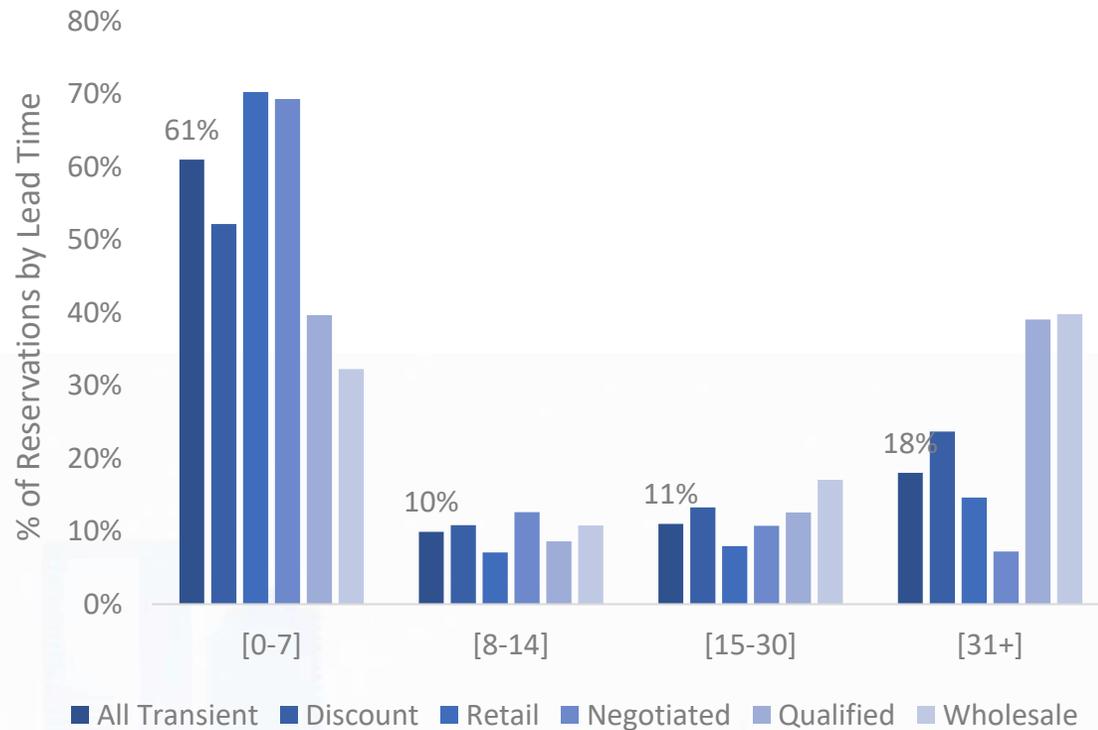
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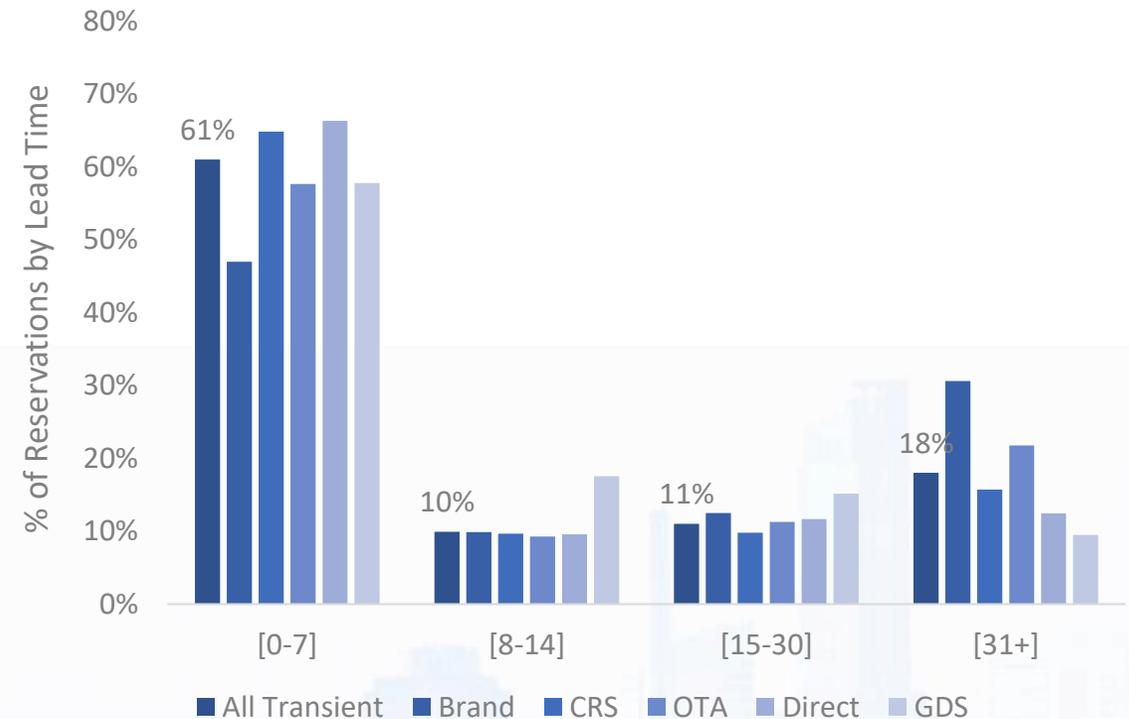
# Transient Lead Time by Segment & Channel | Latin America

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

## Lead Time by Segment



## Lead Time by Channel



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