

# Hospitality Market Insights Report

August 2023

# Executive Summary

**Worldwide** hotel occupancy is lower for August than in 2019, but higher than 2022 for every region except for North America. Retail shares exceed 2019 levels and Brand shares are also up compared to both 2022 and 2019.

Group room nights in the **US** are consistent with last year; however, still trailing 2019 levels. Transient is experiencing a slight decline compared to last year, but a significant decline (-5.7 points) compared to 2019, with rates soaring. **Canada** continues to outpace 2022 and 2019 in Group and has shown less than a 2-point decline in Transient.

**China** has continued its hotel occupancy growth, with levels very close to 2019 for the whole of H1. Retail is driving larger shares than in 2019 and 2022, and OTA shares are on a par with 2019 levels.

Occupancy in the **Rest of Asia** is far above 2022 levels but still slightly below as compared to 2019, for the most part. Jakarta is the only city surpassing 2019 levels in August, with Sydney as a close runner-up. Brand & Retail still have larger shares than in 2019 for the second month in a row.

In **Europe**, hotel occupancy continues to grow as summer approaches, with Athens, Milan, Paris and Rome surpassing 2019 occupancy levels. Brand shares are trending higher than in 2019, while OTAs and Direct shares are at the same level.

Occupancy levels in **Middle East & Africa** are slightly lower what they were in 2019 overall, with a few exceptions, most notably Cape Town, going well above 2019 figures. Brand continues to see a shift from OTAs for the fourth consecutive month.

**Latin America's** occupancy has either exceeded or been on par with 2019 levels throughout the first half of this year. There has been a noticeable shift to Brand.com from other channels year-on-year, while Retail has surpassed 2019 numbers.



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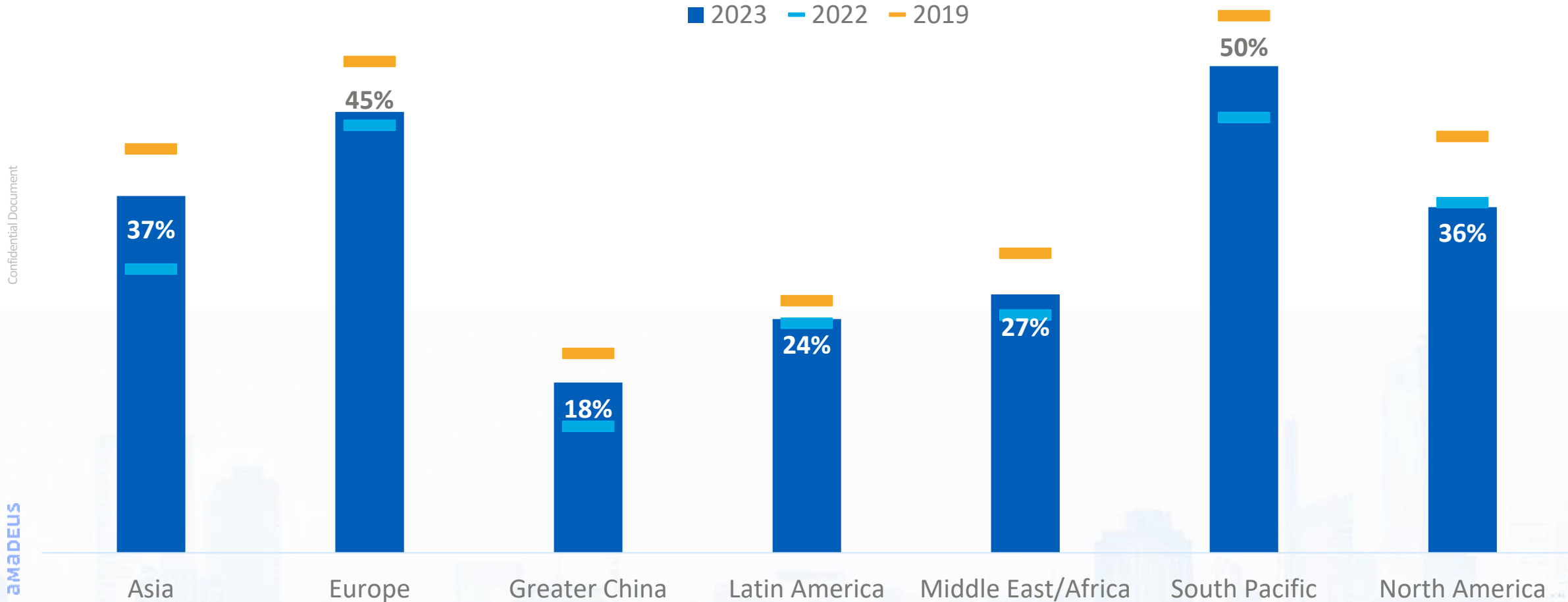
# Top 10 Markets for Air Arrivals

Worldwide and regional air passenger arrivals in August 2023

	Worldwide	Asia	Canada	Caribbean	Europe	Greater China	Latin America	Middle East - Africa	South Pacific	United States
1	London	Tokyo	Toronto, ON	Montego Bay	London	Shanghai	Sao Paulo	Dubai	Sydney	New York, NY
2	New York, NY	Bangkok	Vancouver, BC	Nassau	Paris	Beijing	Mexico City	Jeddah	Melbourne	Los Angeles, CA
3	Shanghai	Seoul	Montreal, QC	Aruba	Istanbul	Chengdu	Cancun	Riyadh	Brisbane	Washington, DC
4	Beijing	Moscow	Calgary, AB	Kingston	Milan	Guangzhou	Bogota	Tel Aviv-Yafo	Auckland	Chicago, IL
5	Paris	Delhi	Edmonton, AB	Port of Spain	Barcelona	Shenzhen	Buenos Aires	Cairo	Perth	Orlando, FL
6	Tokyo	Jakarta	Ottawa, ON	Belize City	Palma de Mallorca	Kunming	Lima	Johannesburg	Christchurch	Dallas, TX
7	Los Angeles, CA	Mumbai	Winnipeg, MB	Pointe-a-Pitre	Amsterdam	Hangzhou	Rio de Janeiro	Kuwait	Gold Coast	Denver, CO
8	Chengdu	Kuala Lumpur	Halifax, NS	Curacao	Rome	Chongqing	Santiago	Doha	Wellington	Las Vegas, NV
9	Bangkok	Singapore	Kelowna, BC	Fort-de-France	Madrid	Taipei	Guadalajara	Sharjah	Cairns	Atlanta, GA
10	Seoul	Osaka	Victoria, BC	Bridgetown	Frankfurt	Xi'an	Tijuana	Dammam	Canberra	San Francisco, CA

# Hotel Occupancy by Region | Worldwide

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



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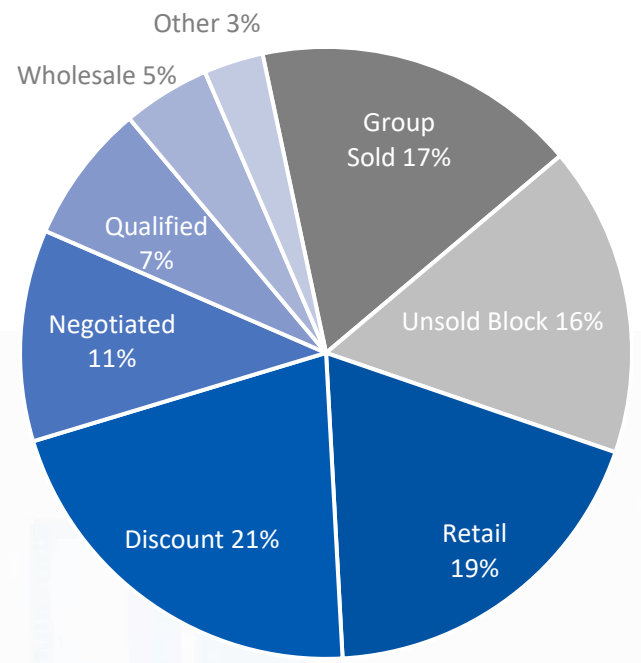
# Year-on-Year Segmentation | Worldwide

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

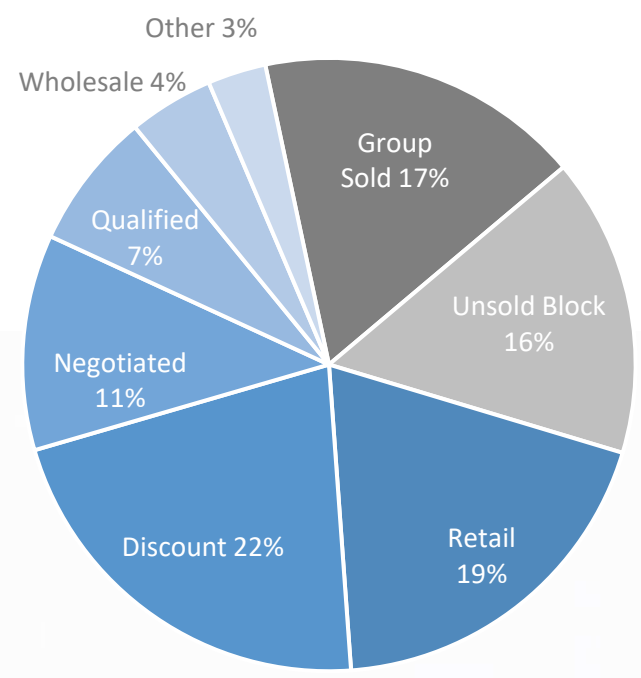
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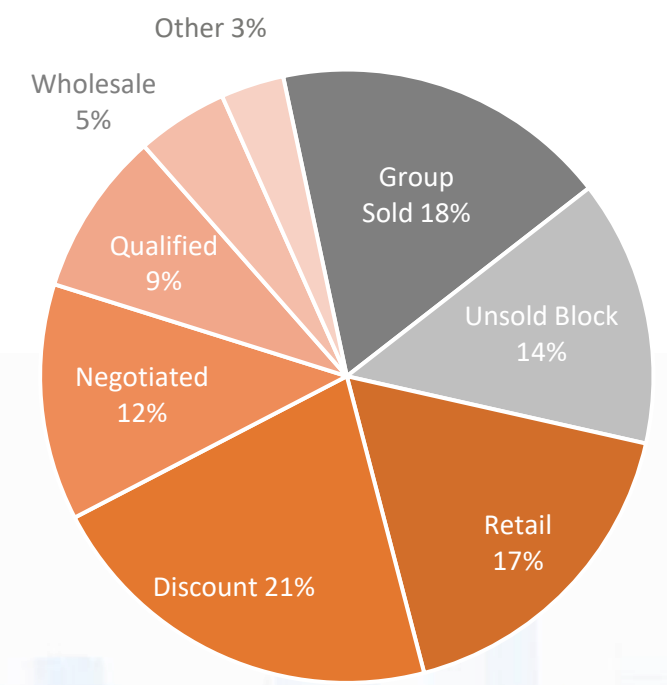
### 2023



### 2022



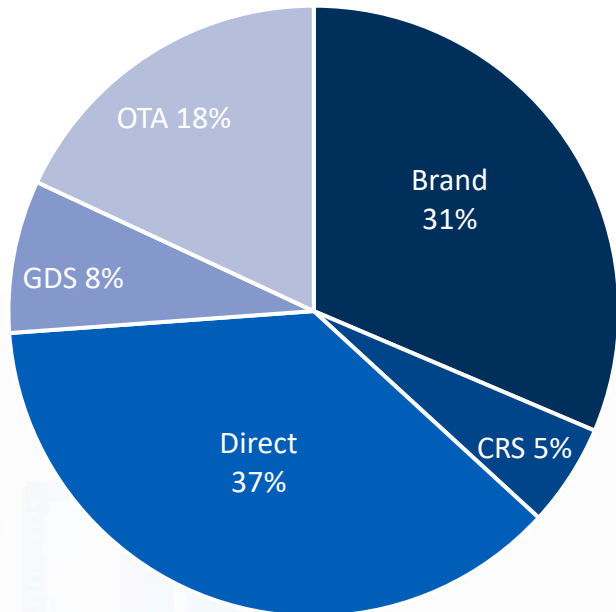
### 2019



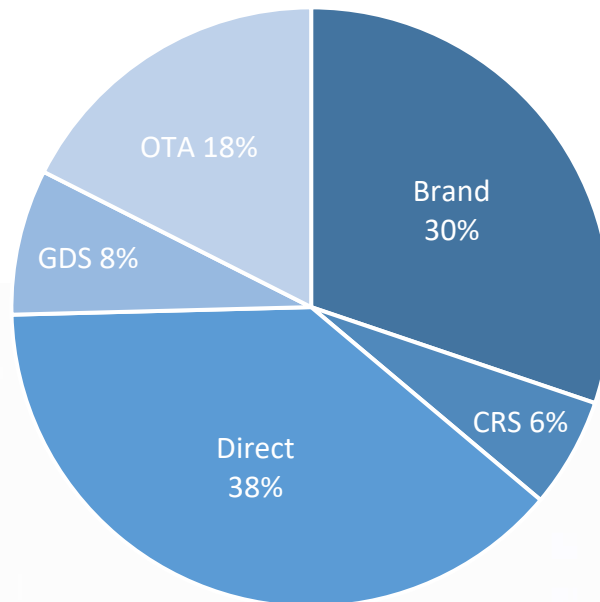
# Year-on-Year Channel Mix | Worldwide

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

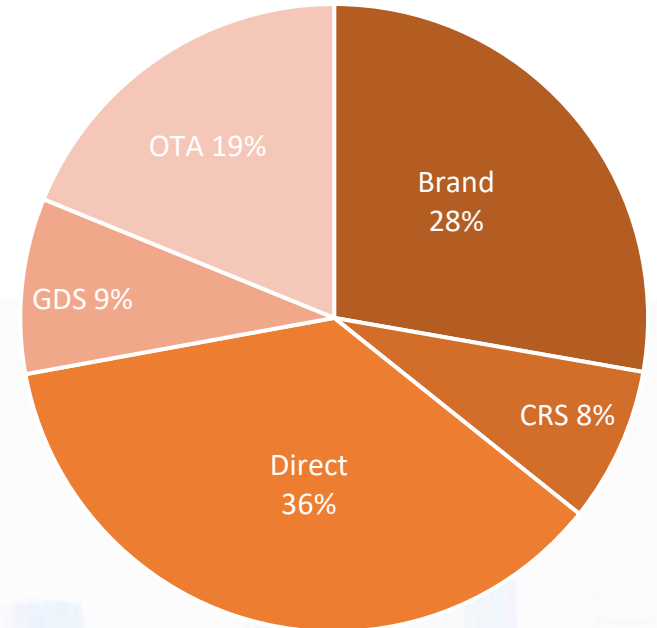
2023



2022



2019



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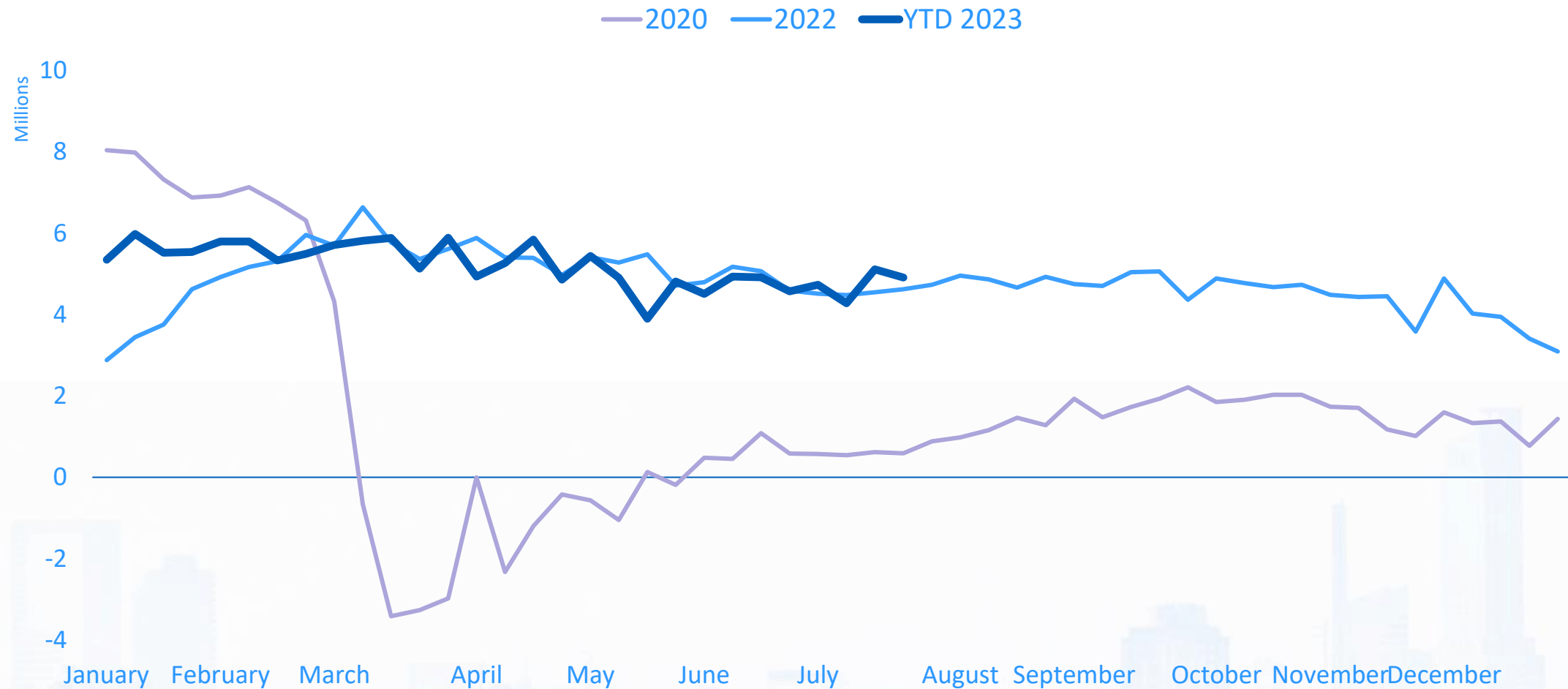


**United States**



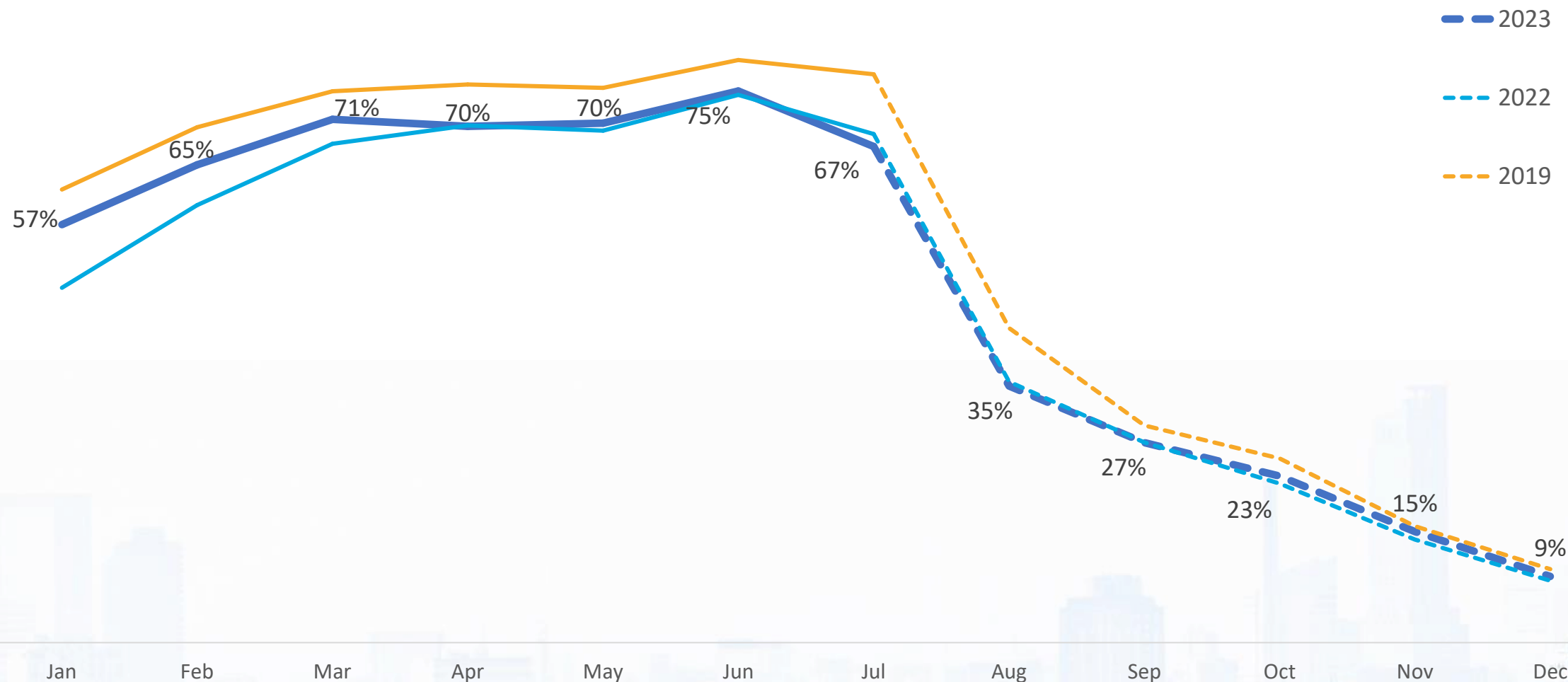
# Airline Year-on-Year Net Reservations | United States

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



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

2023 occupancy by month compared to 2022 and 2019.

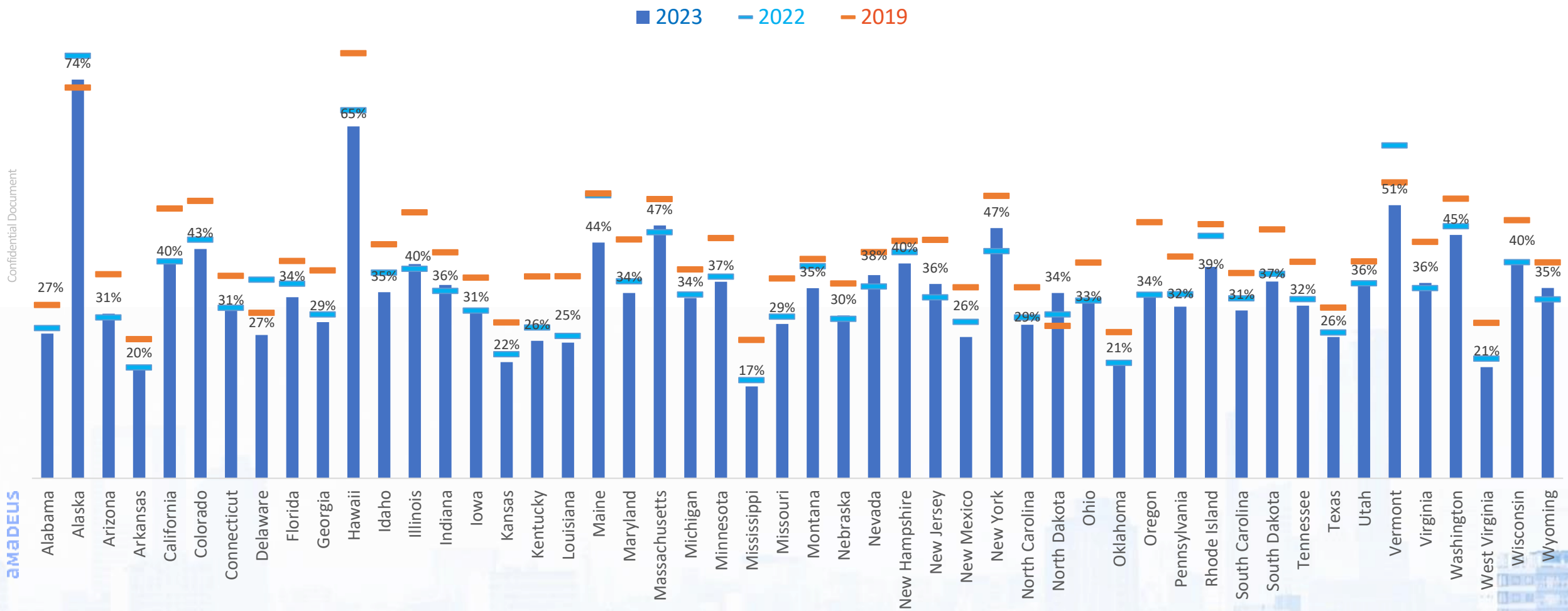


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# Occupancy & Pace by State | United States

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



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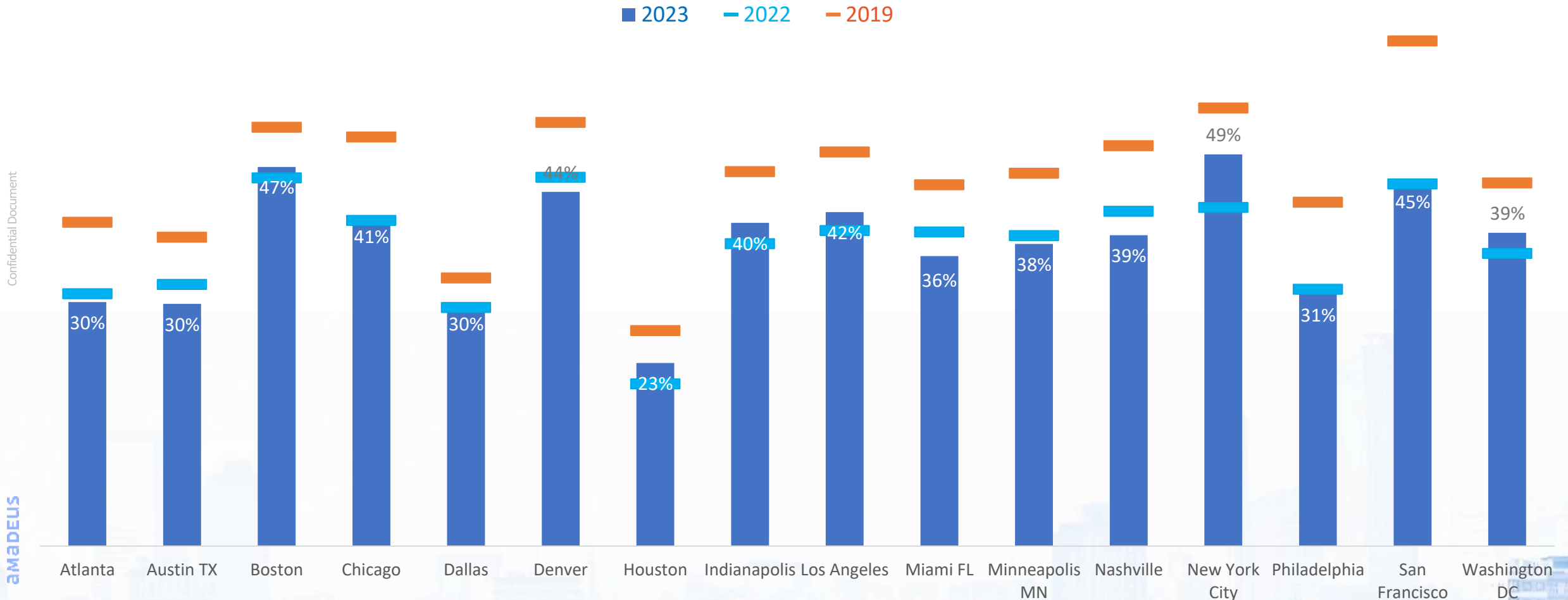
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Source: Amadeus Demand360® data as of July 21, 2023

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# Occupancy & Pace by Market | United States

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

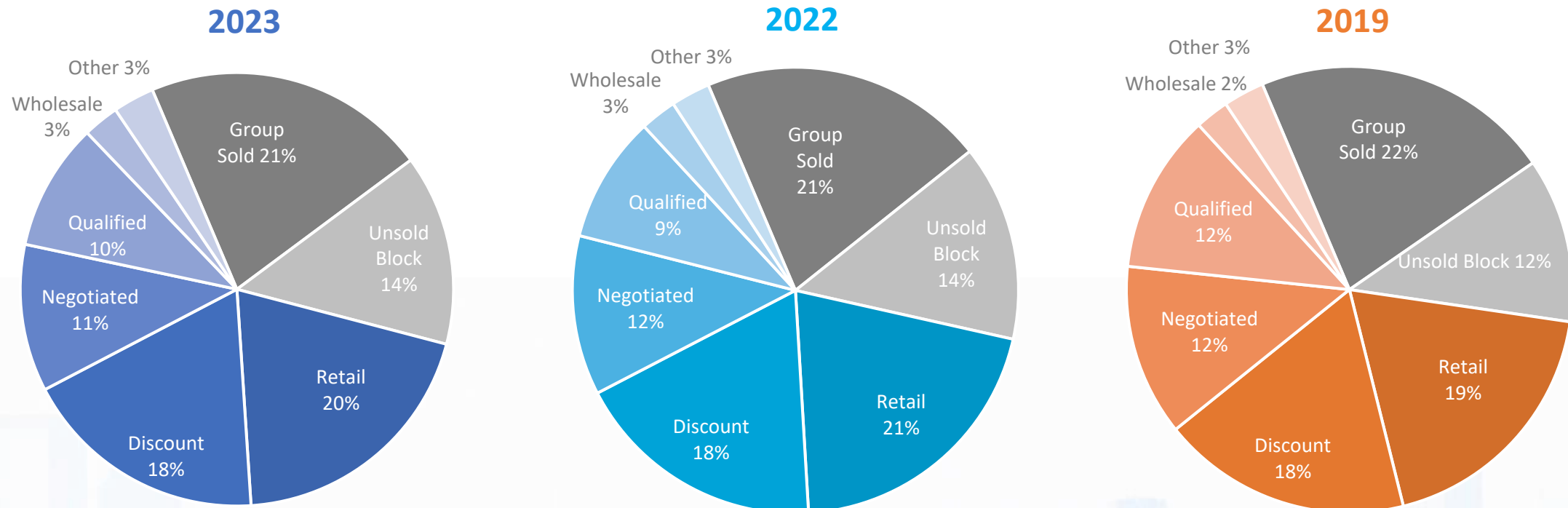


Source: Amadeus Demand360® data as of July 21, 2023

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# Year-on-Year Segmentation | United States

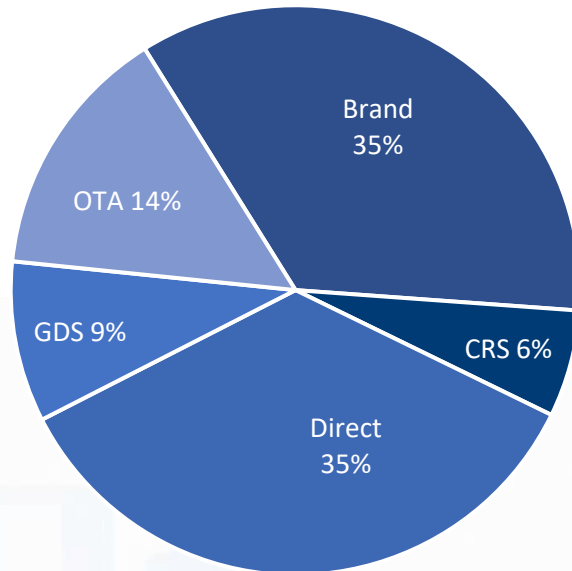
On-the-books market segmentation mix for August 2023 vs. same time last year and in 2019.



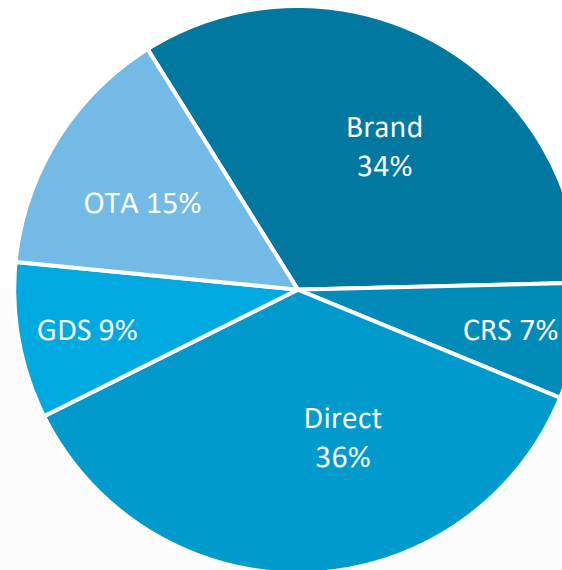
# Year-on-Year Channel Mix | United States

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

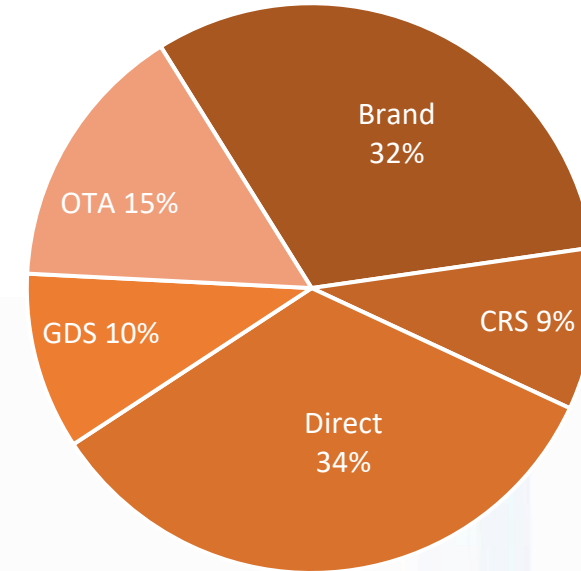
2023



2022



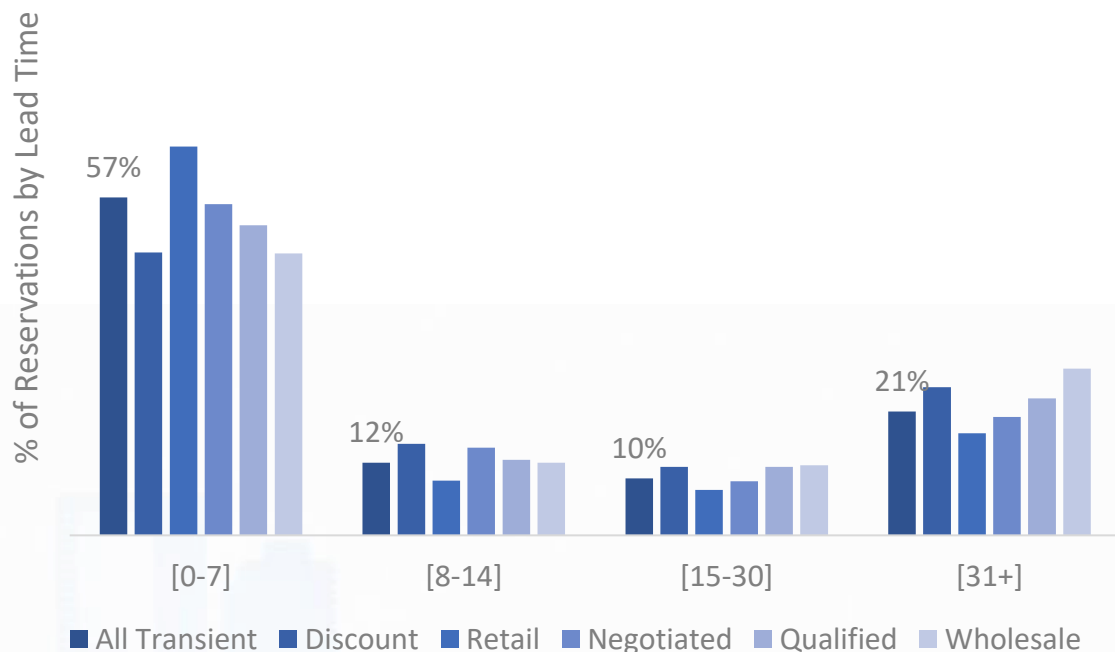
2019



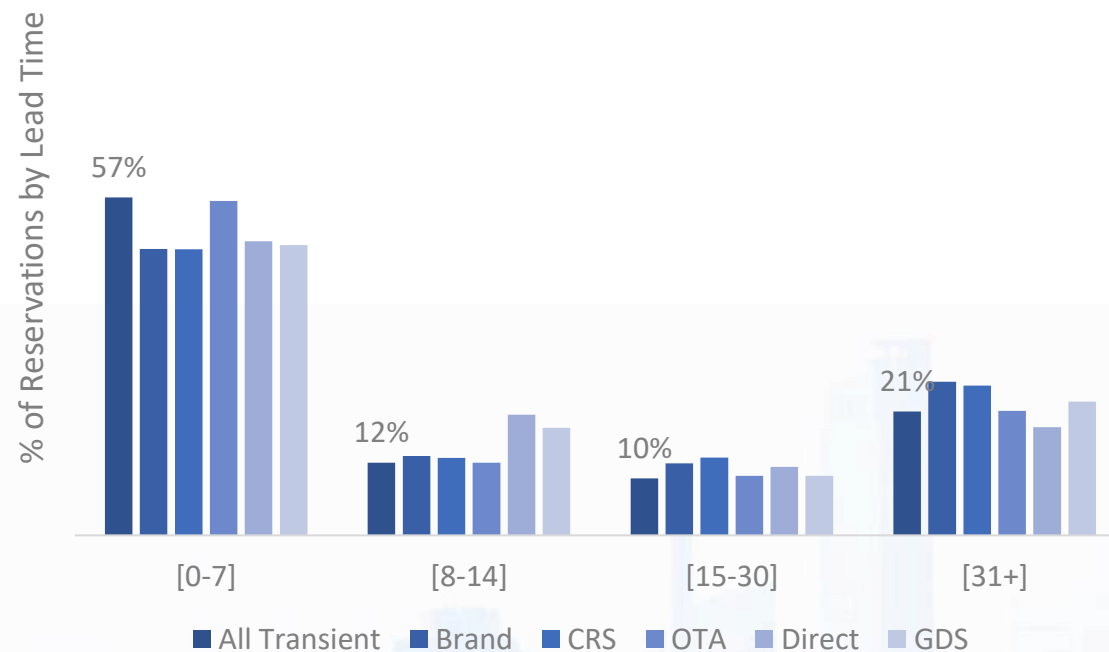
# Transient Lead Time by Segment & Channel | United States

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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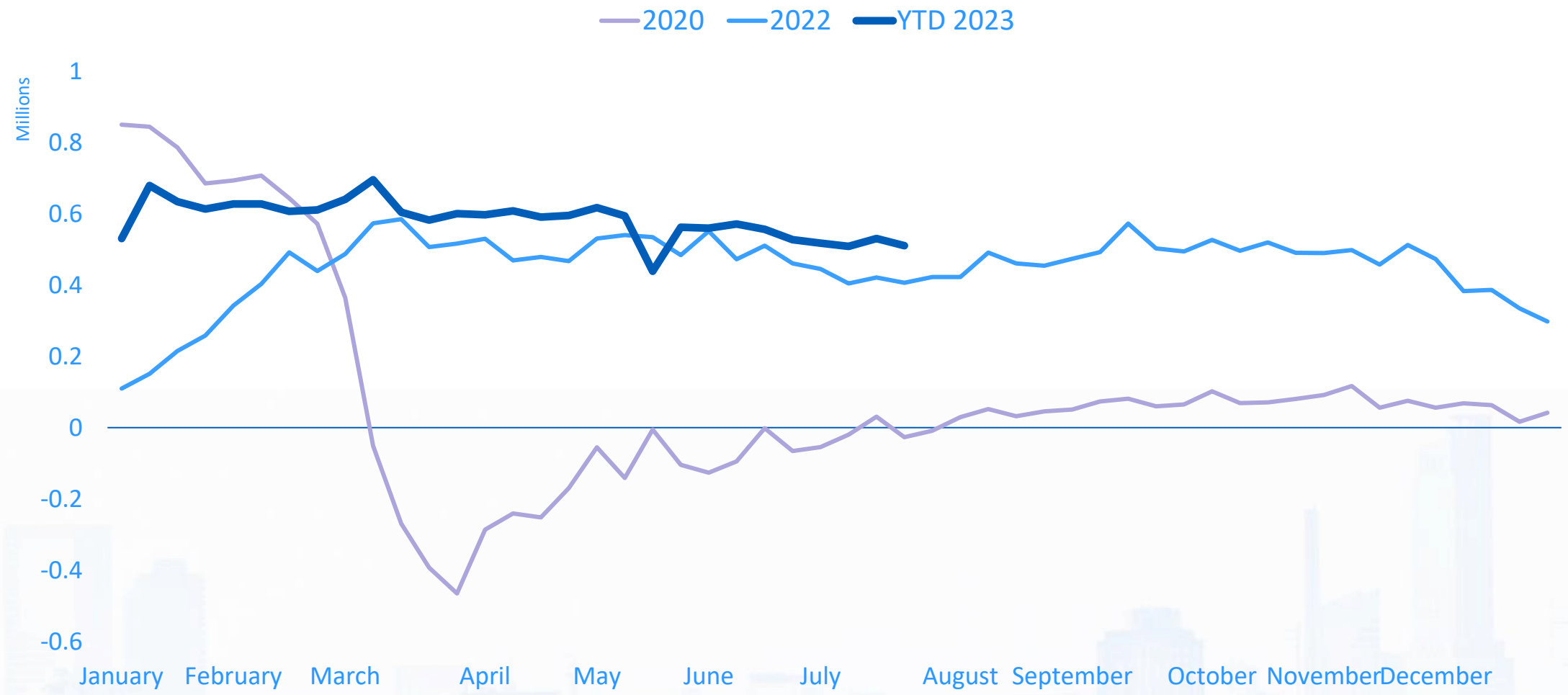


Canada



# Airline Year-on-Year Net Reservations | Canada

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

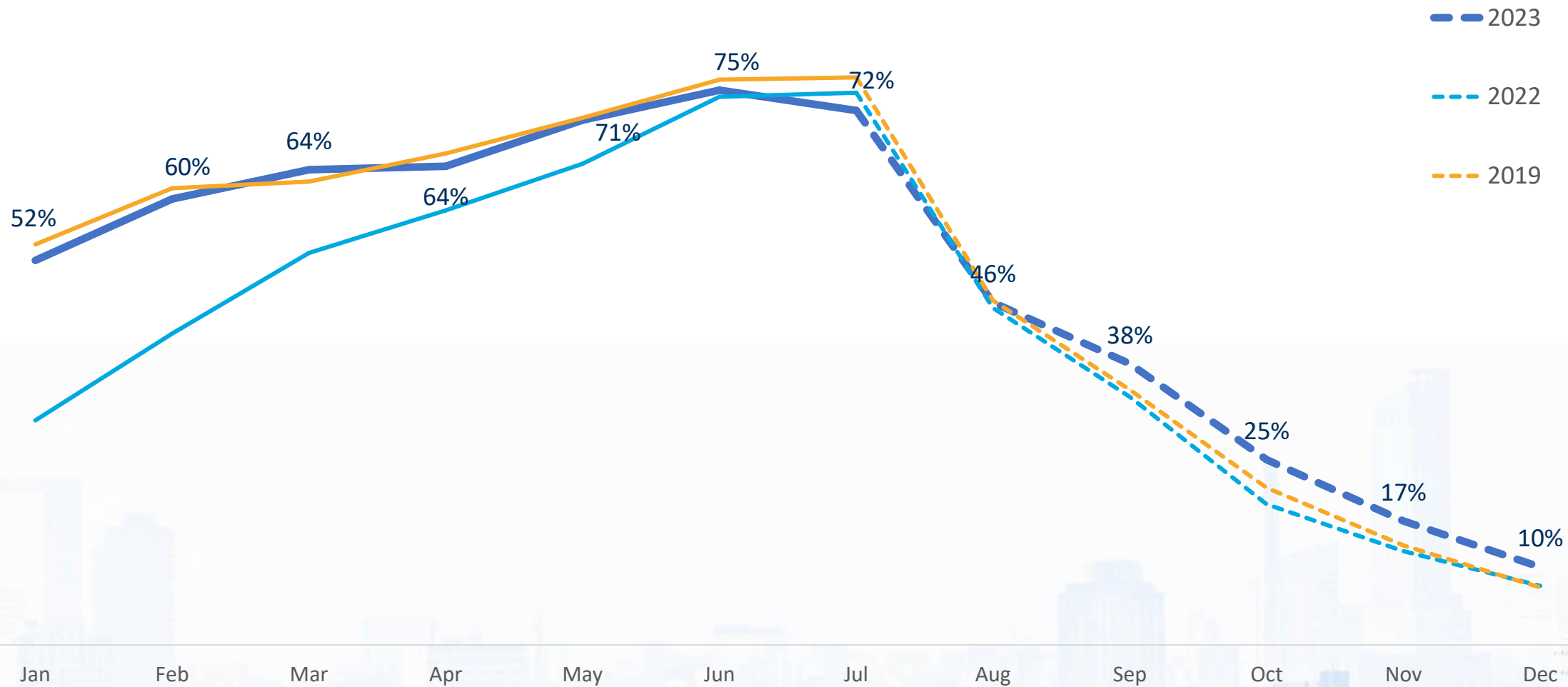


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# Monthly Occupancy & Year-on-Year Variance | Canada

2023 occupancy by month compared to 2022 and 2019.

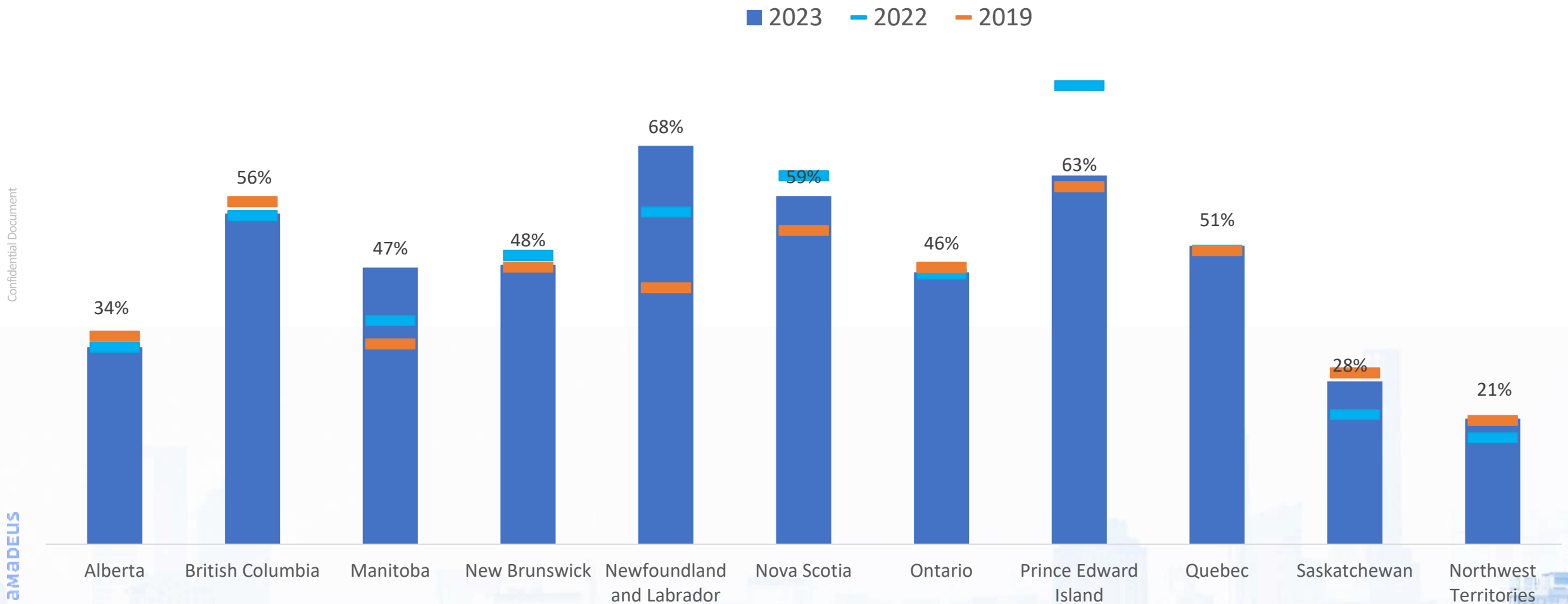


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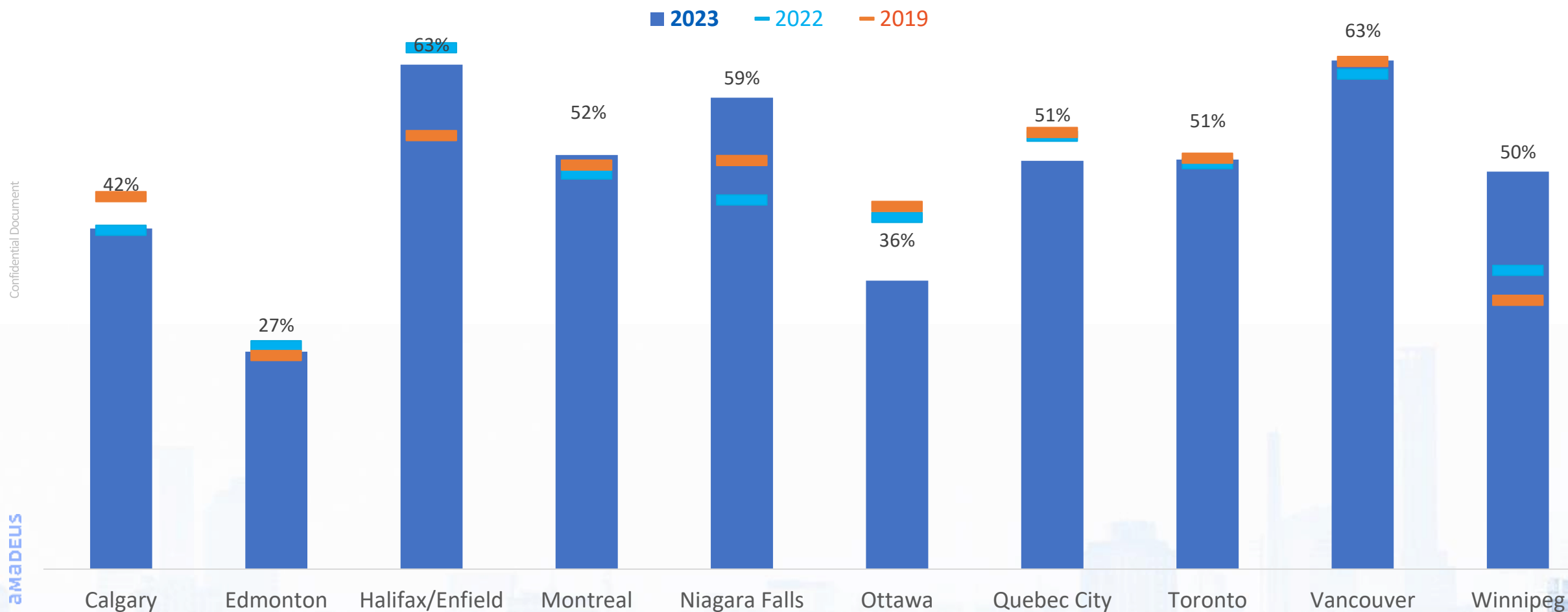
# Occupancy & Pace by Province | Canada

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



# Occupancy & Pace by Market | Canada

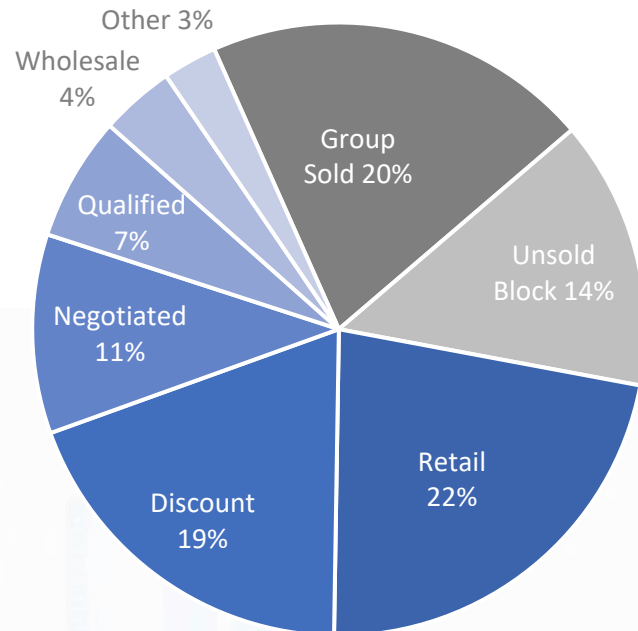
On-the-books total occupancy by market for August 2023 vs. same time last year and in 2019.



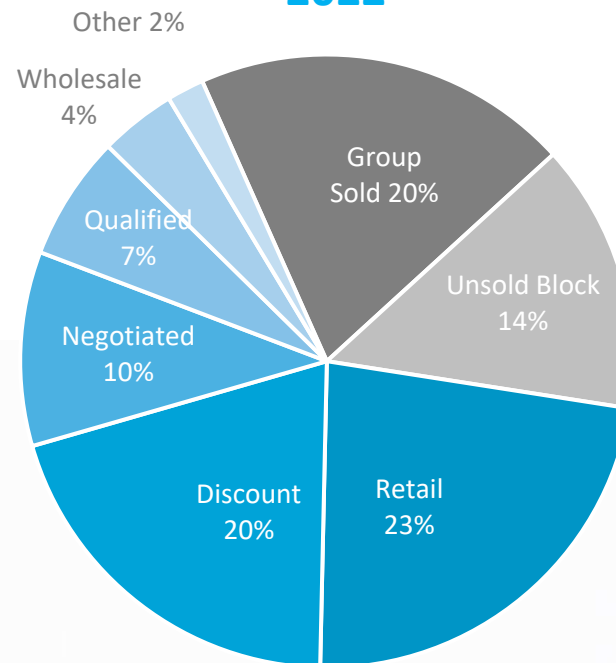
# Year-on-Year Segmentation | Canada

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

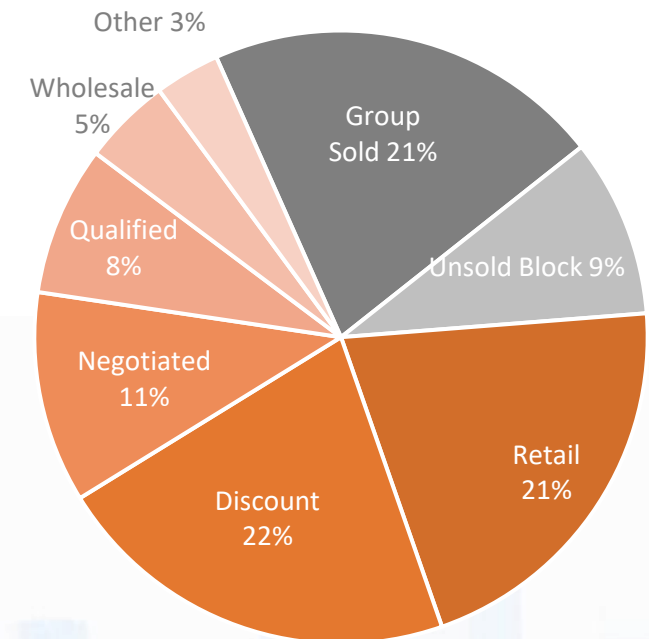
## 2023



## 2022



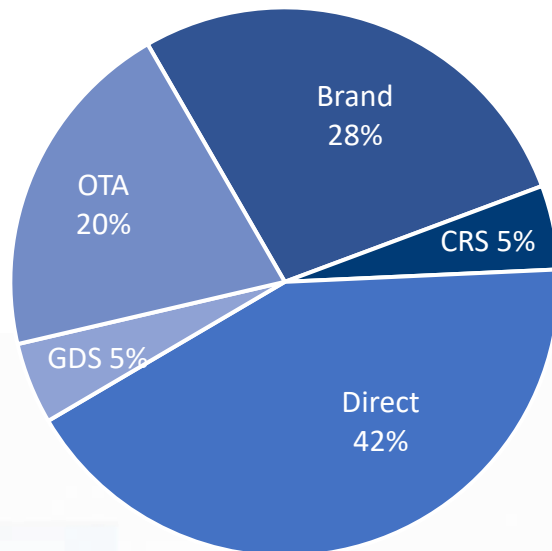
## 2019



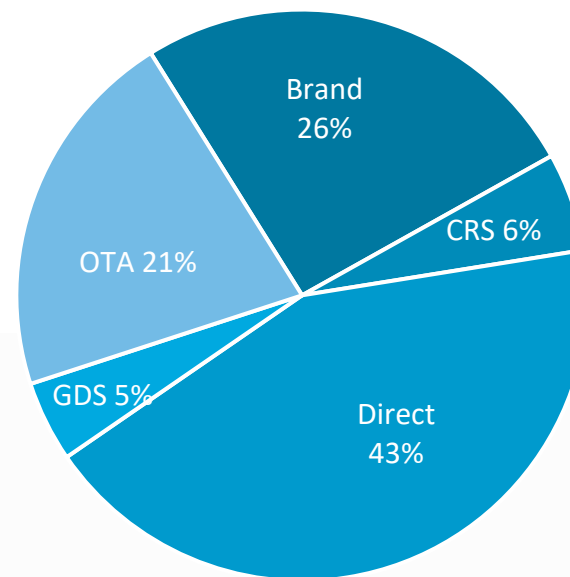
# Year-on-Year Channel Mix | Canada

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

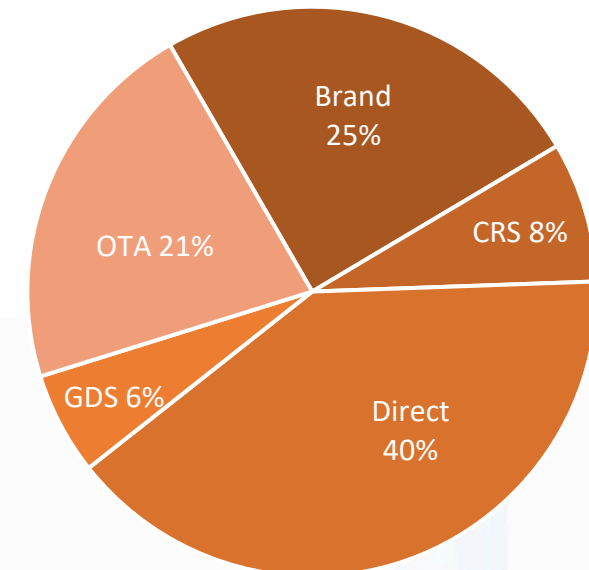
2023



2022



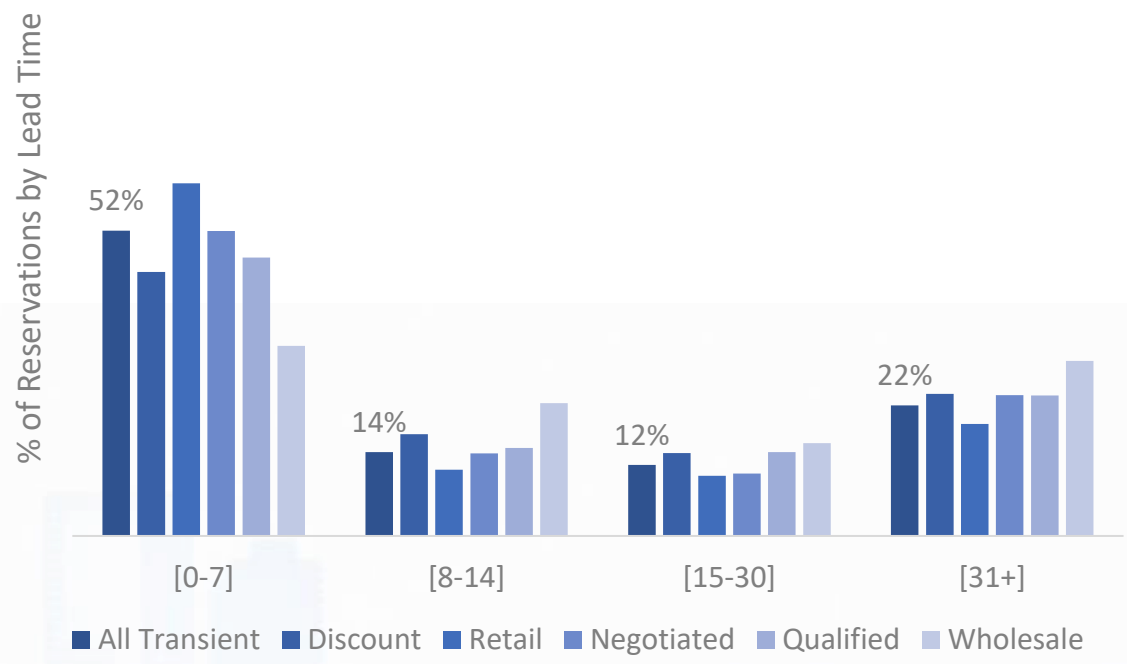
2019



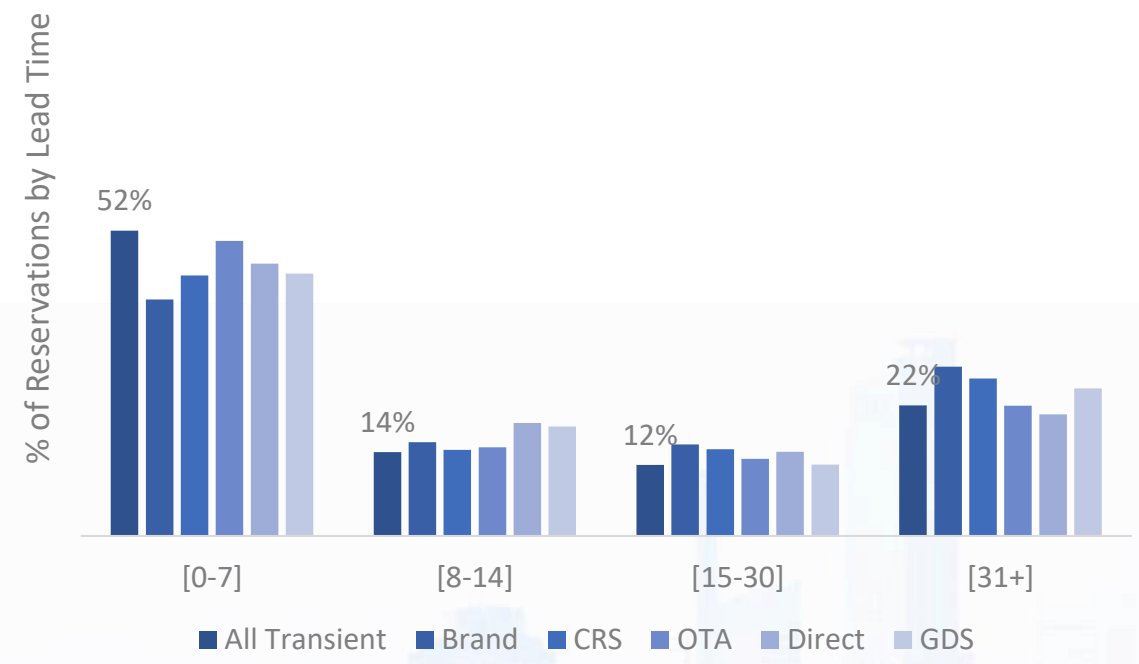
# Transient Lead Time by Segment & Channel | Canada

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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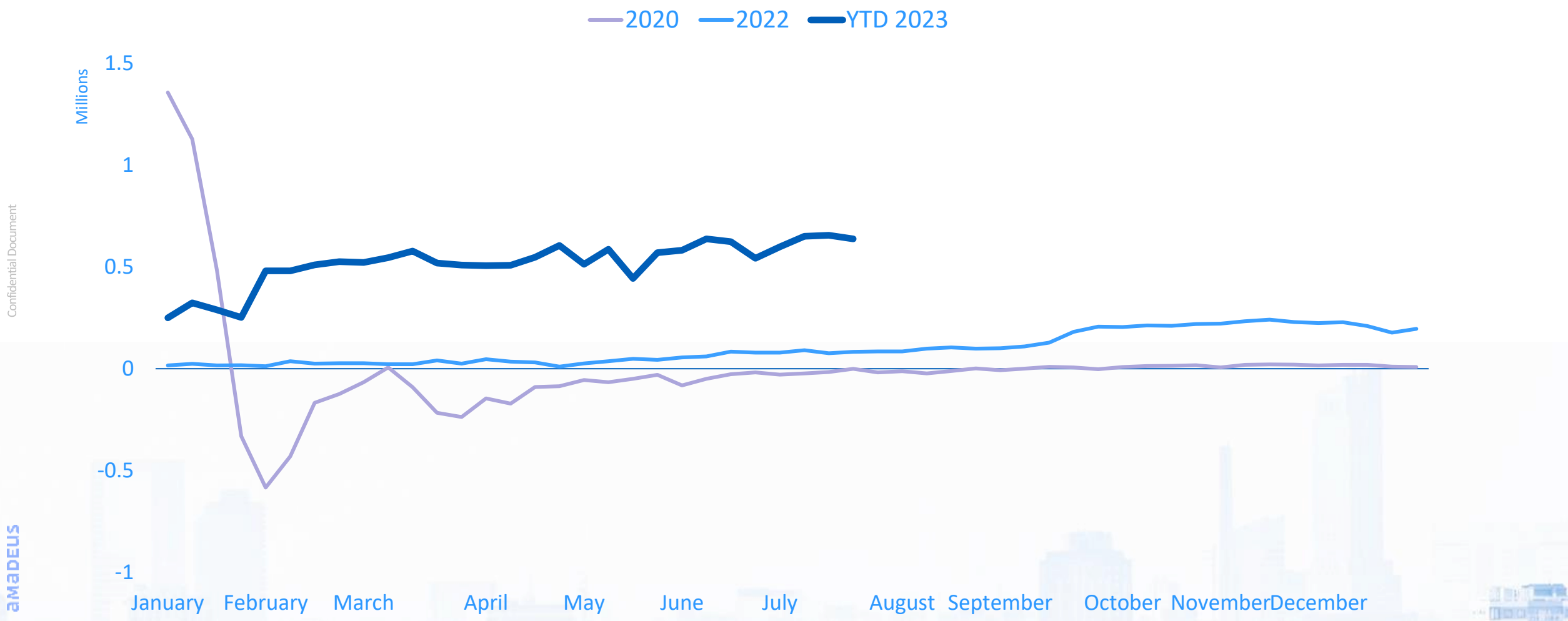


**Greater China**



# Airline Year-on-Year Net Reservations | Greater China

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



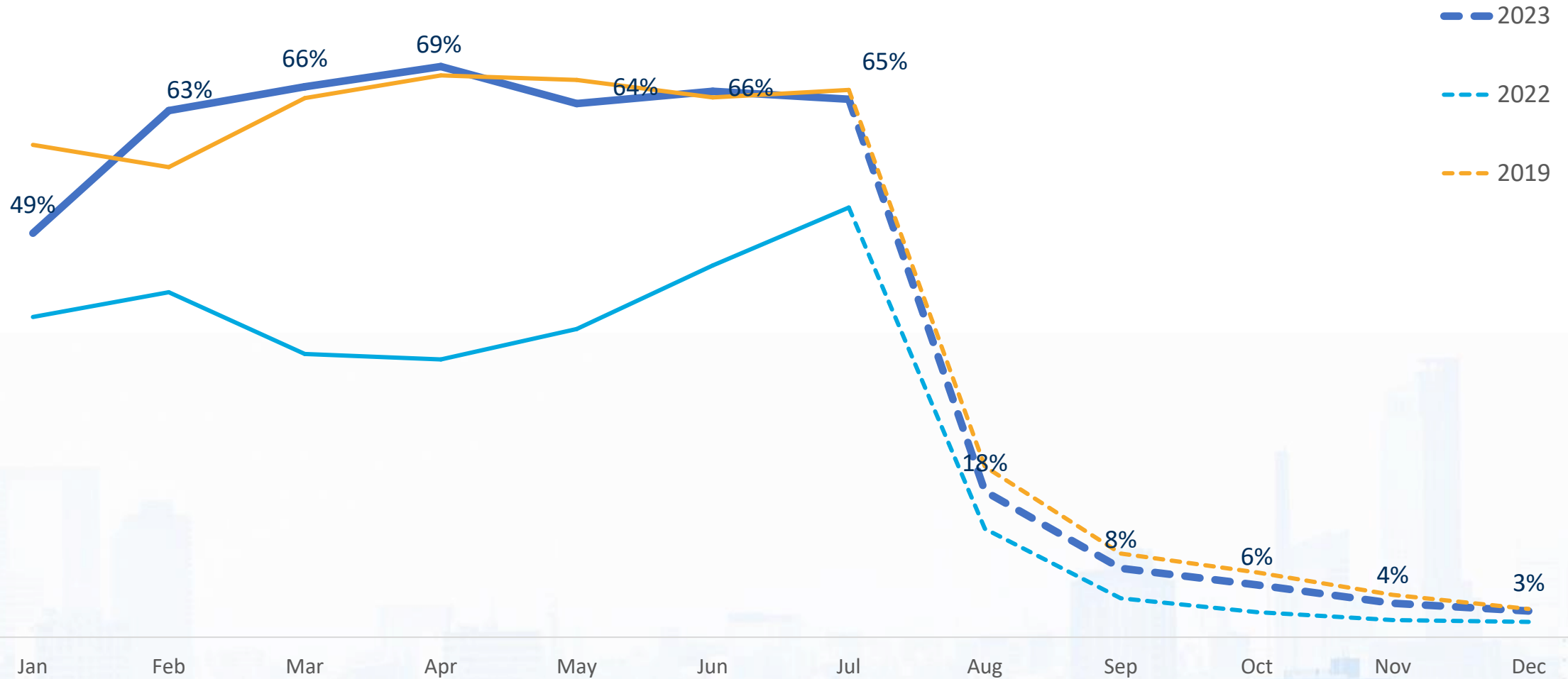
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# Monthly Occupancy & Year-on-Year Variance | Greater China

2023 occupancy by month compared to 2022 and 2019.

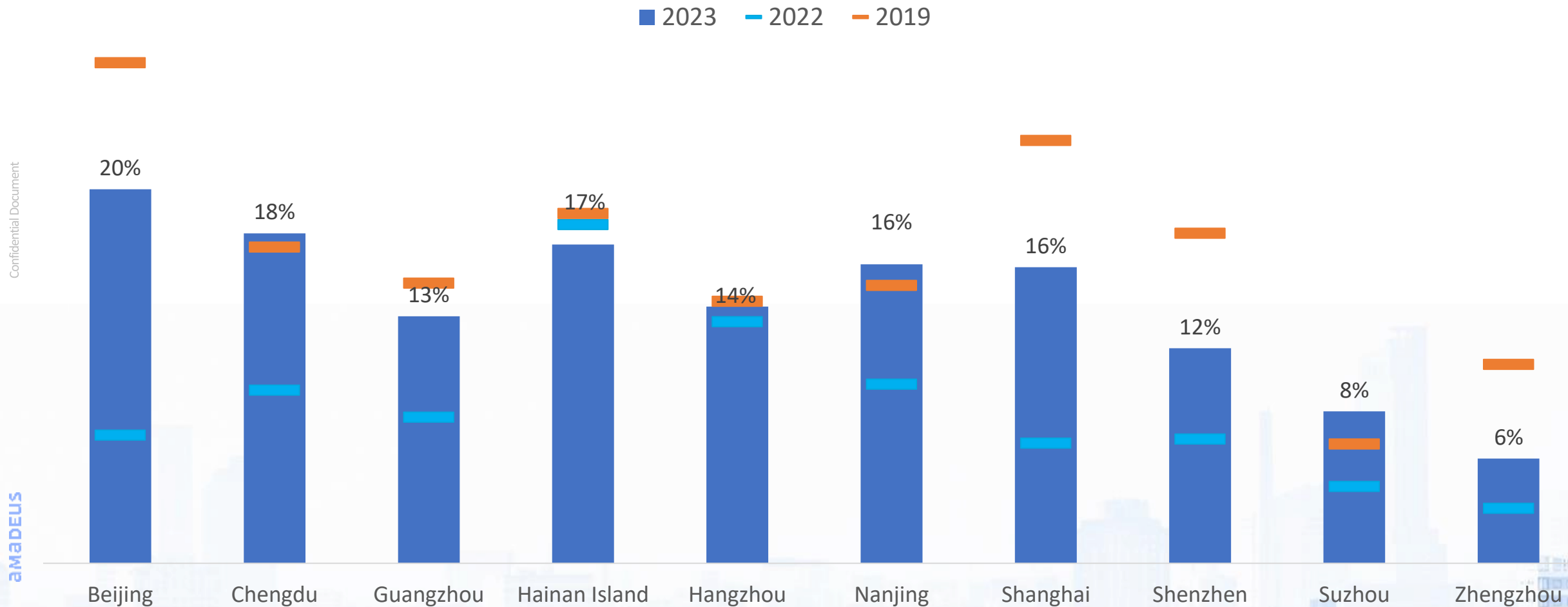
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# Occupancy & Pace by Market | Greater China

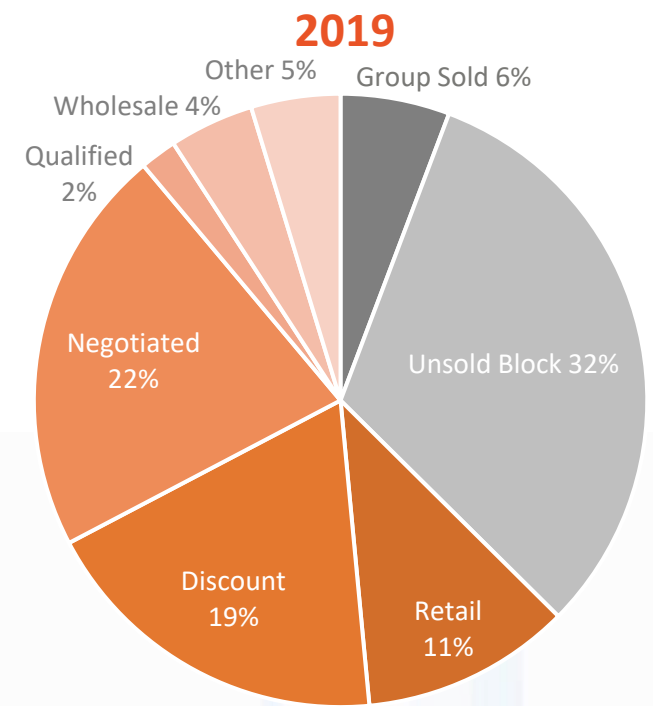
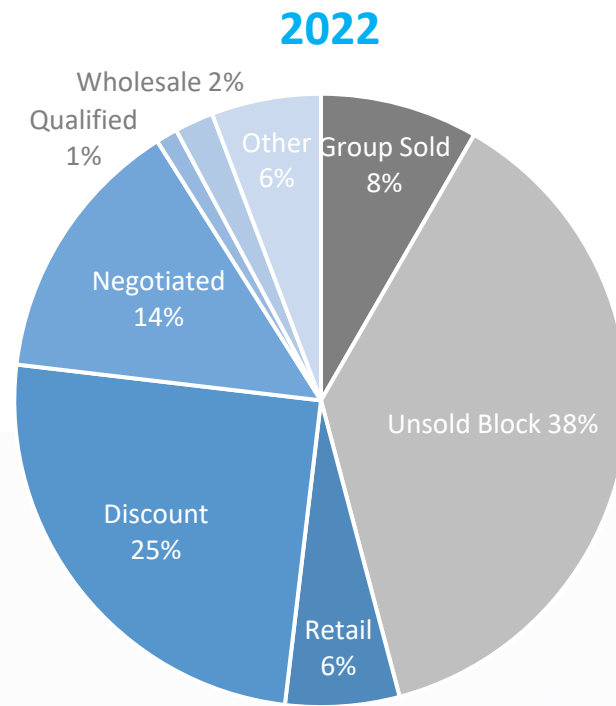
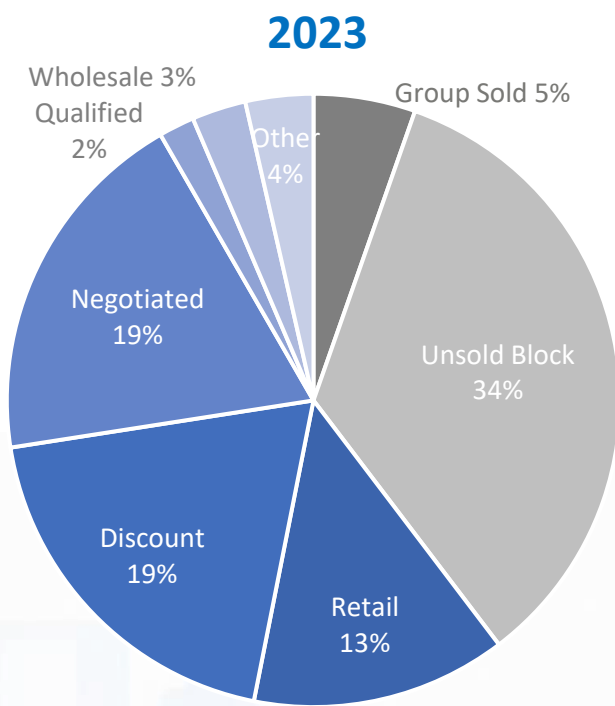
On-the-books total occupancy by market for August 2023 vs. same time last year and in 2019.



# Year-on-Year Segmentation | Greater China

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

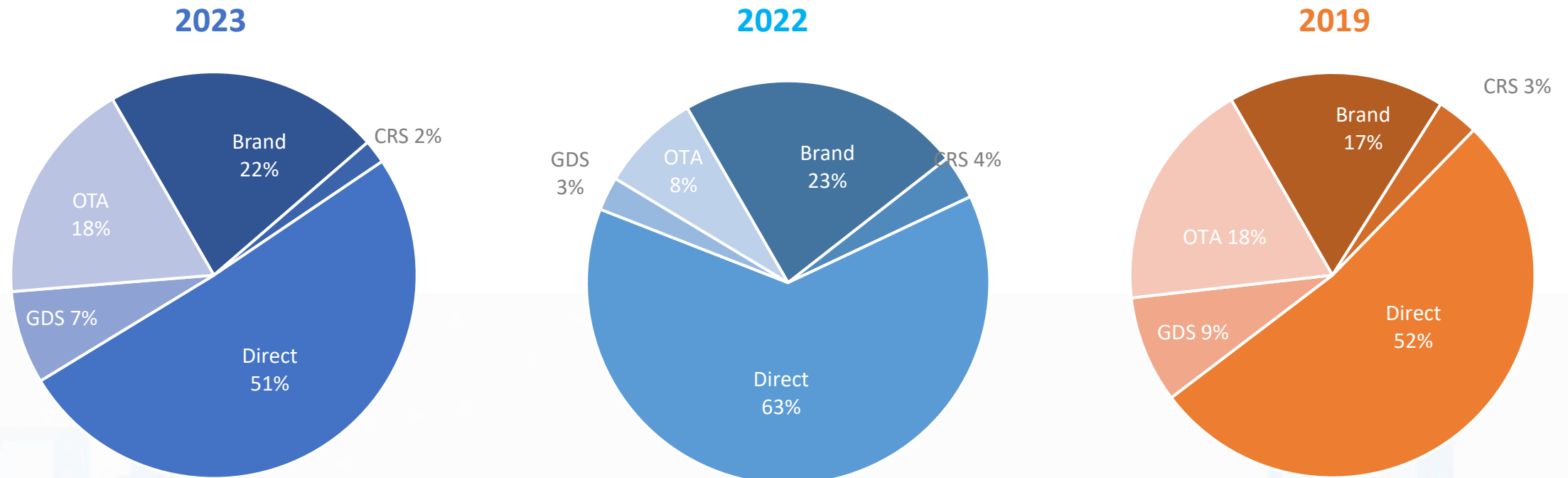
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# Year-on-Year Channel Mix | Greater China

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



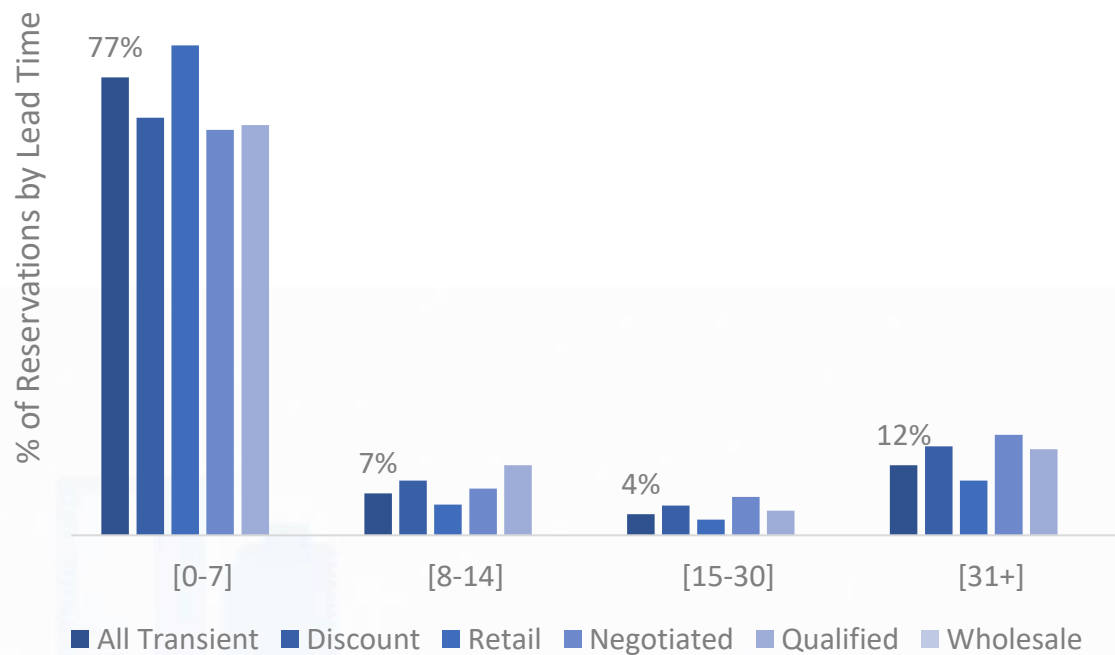
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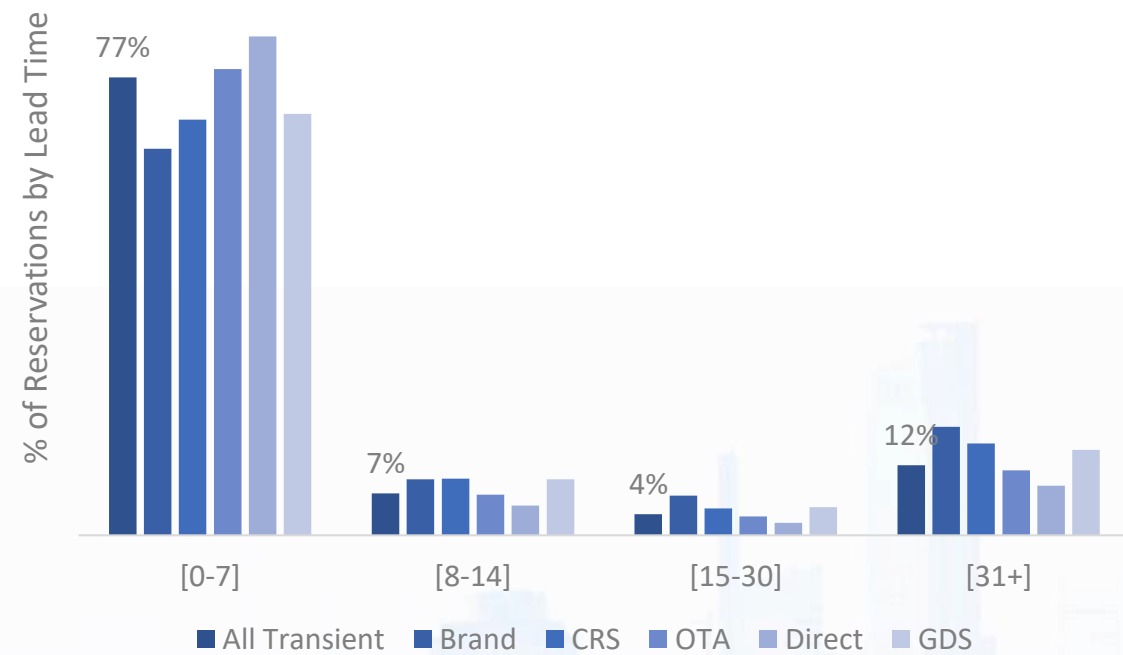
# Transient Lead Time by Segment & Channel | Greater China

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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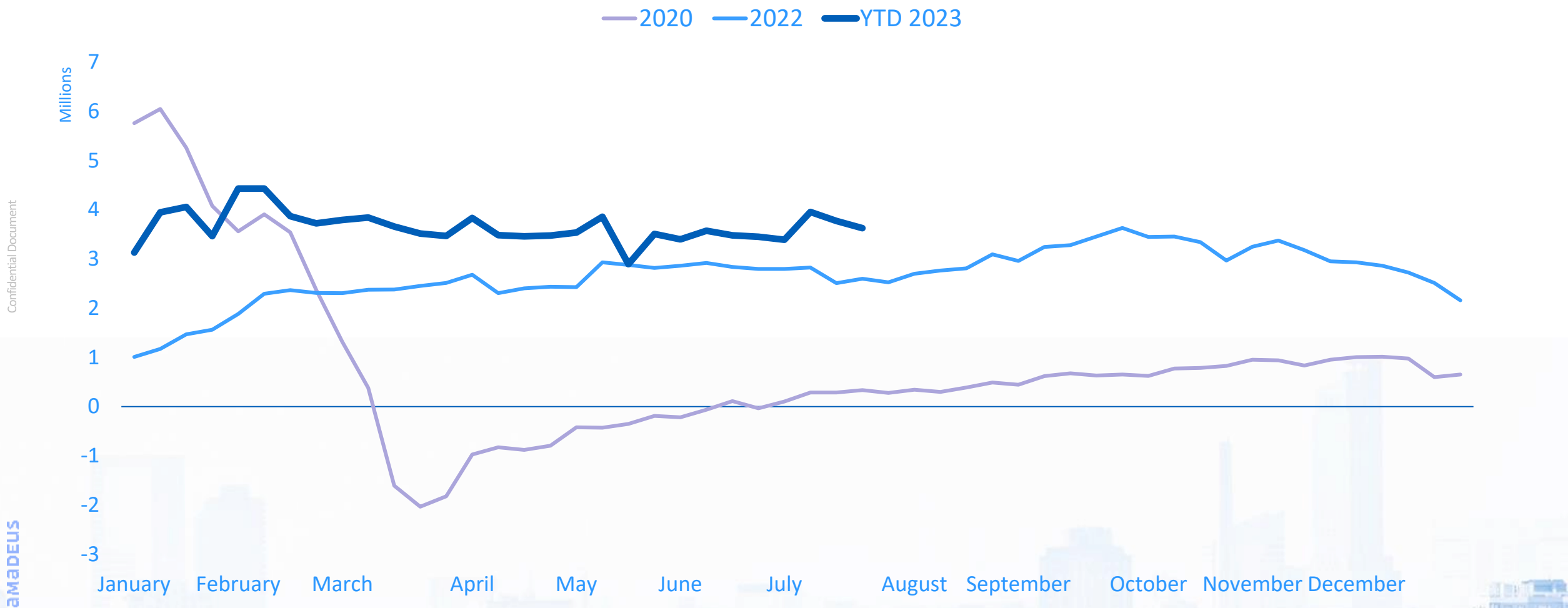
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# Rest of Asia Pacific



# 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.



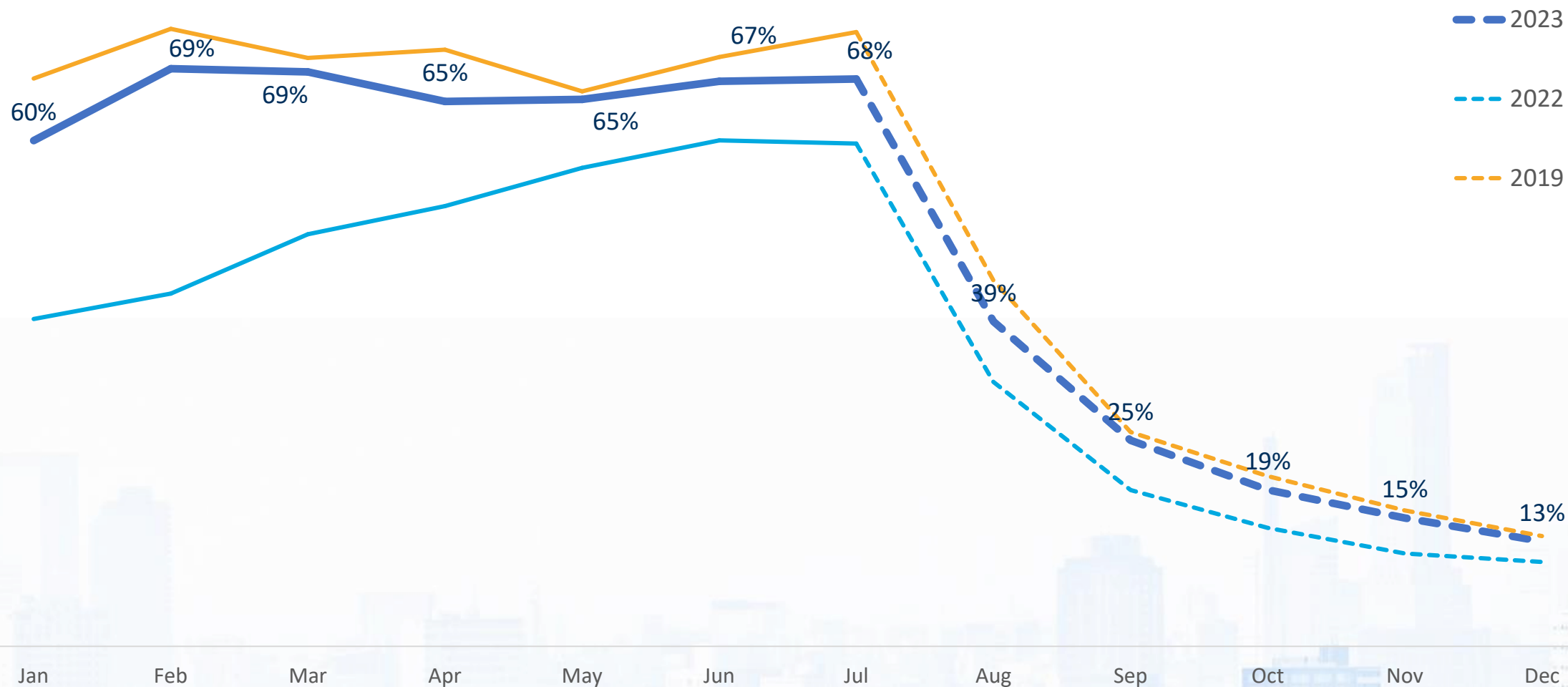
Source: Amadeus GDS Airline Booking Data (MIDT) data as of July 21, 2023

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

2023 occupancy by month compared to 2022 and 2019.

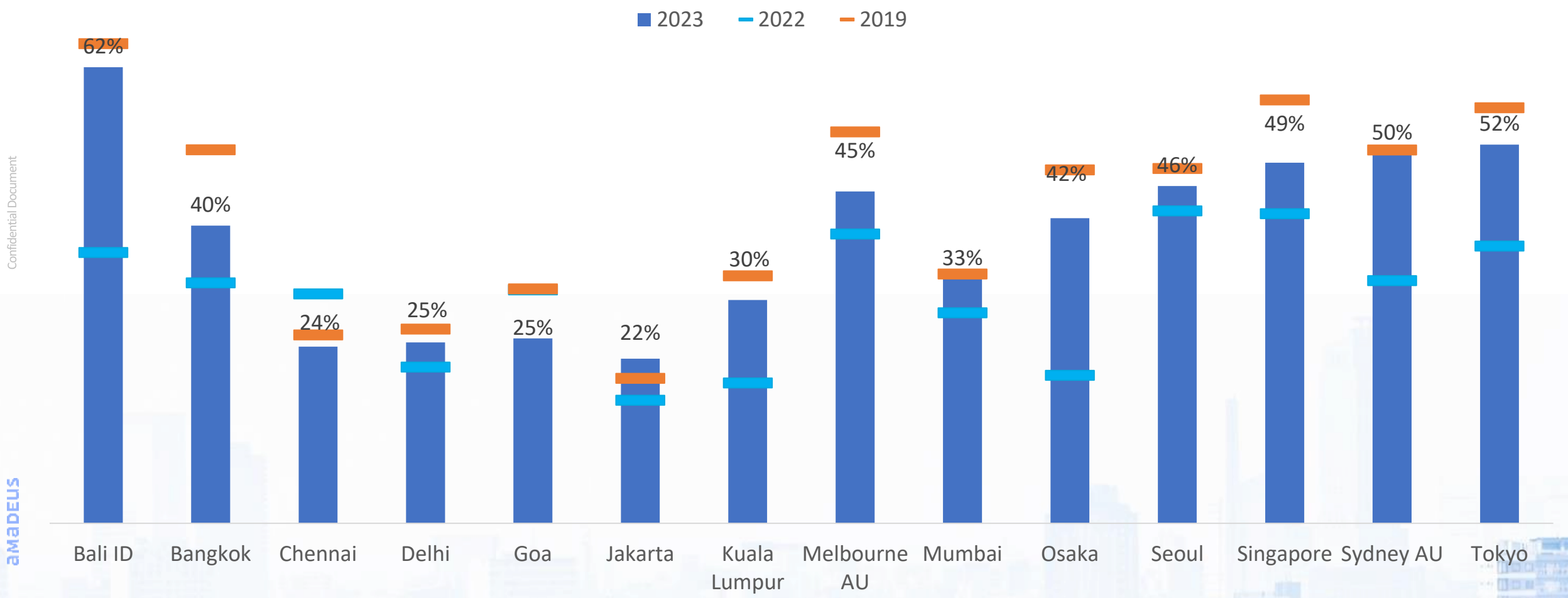


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# Occupancy & Pace by Market | Rest of Asia Pacific

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

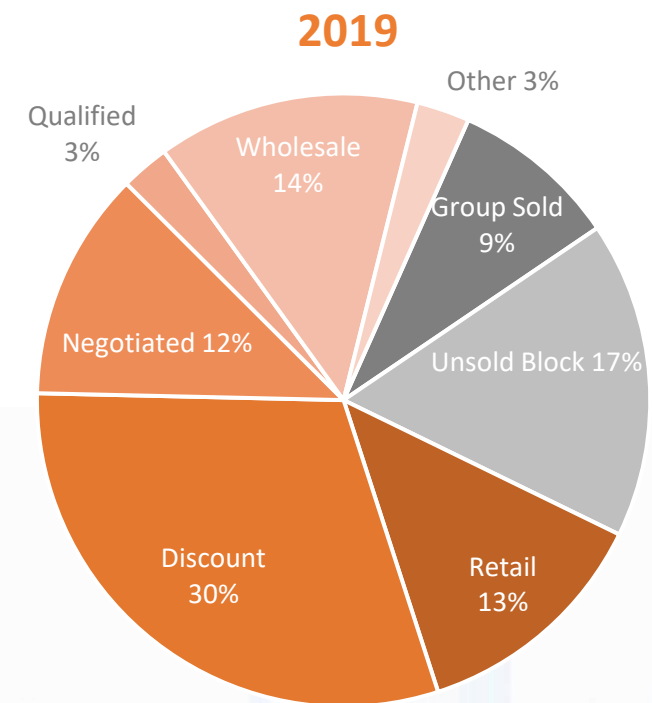
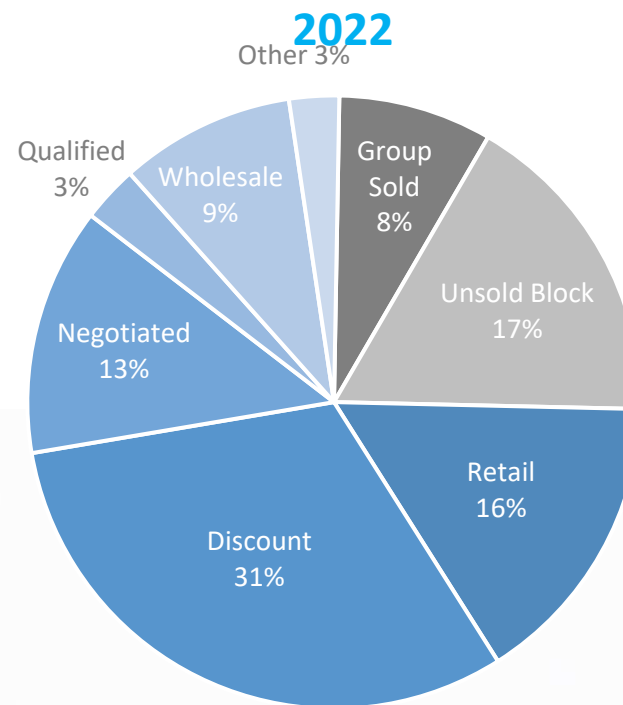
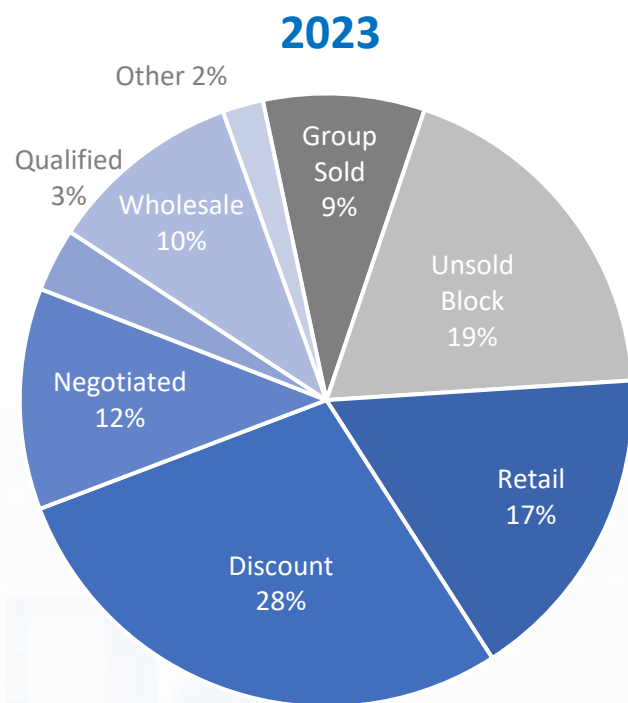


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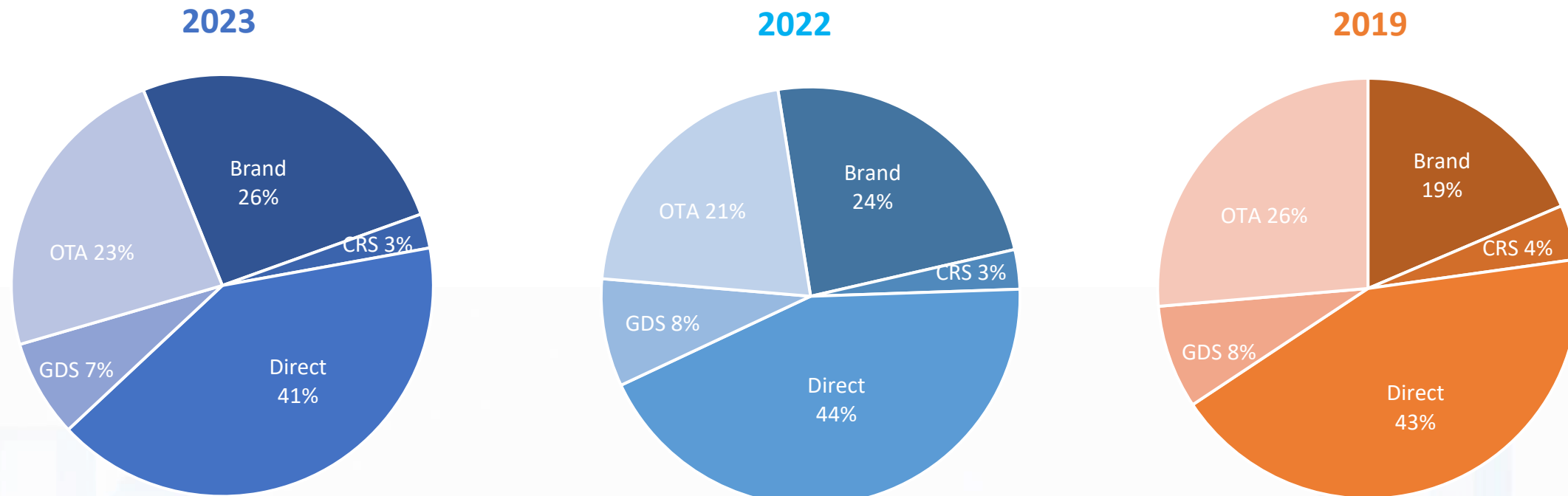
# Year-on-Year Segmentation | Rest of Asia Pacific

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



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

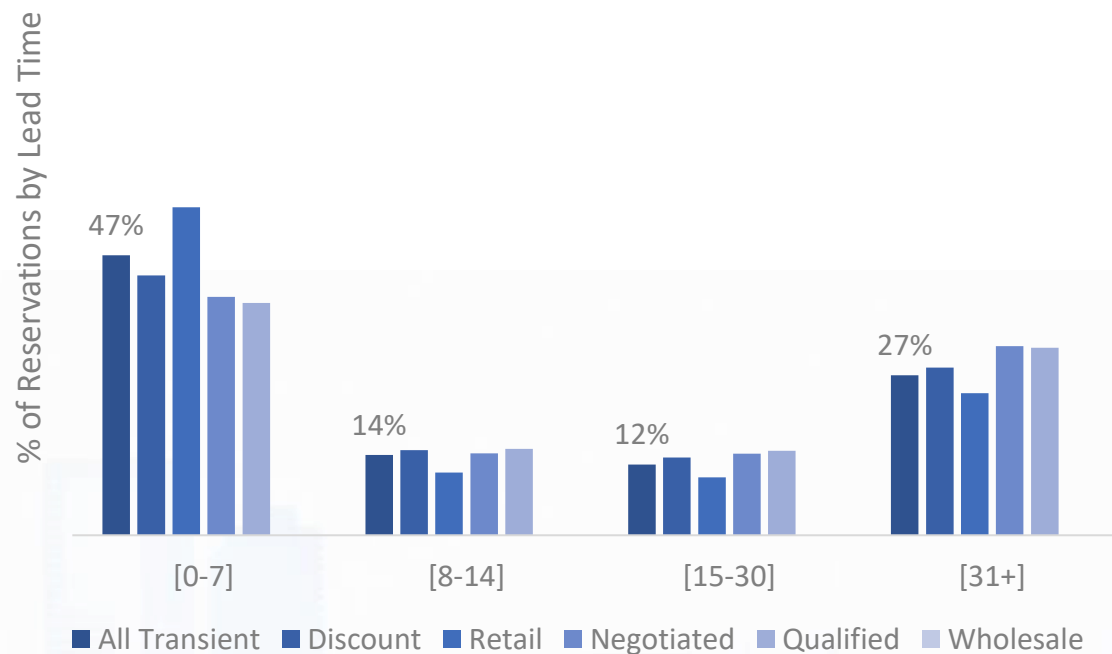
On-the-books distribution channel mix for August 2023 vs. same time last year and in 2019.



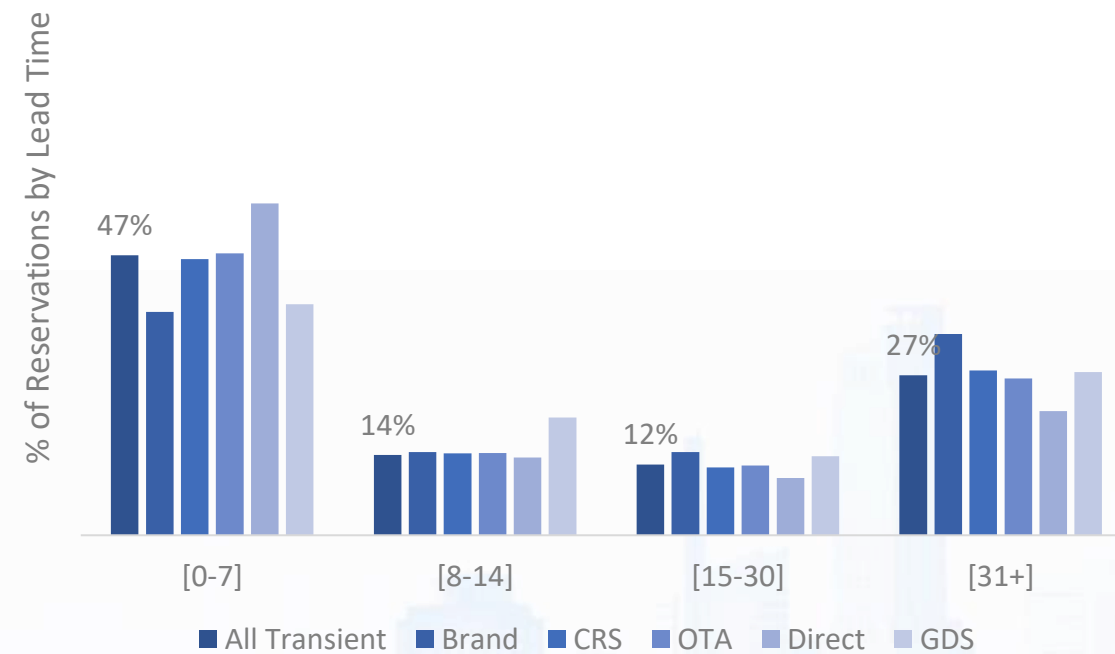
# Transient Lead Time by Segment & Channel | Rest of Asia Pacific

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

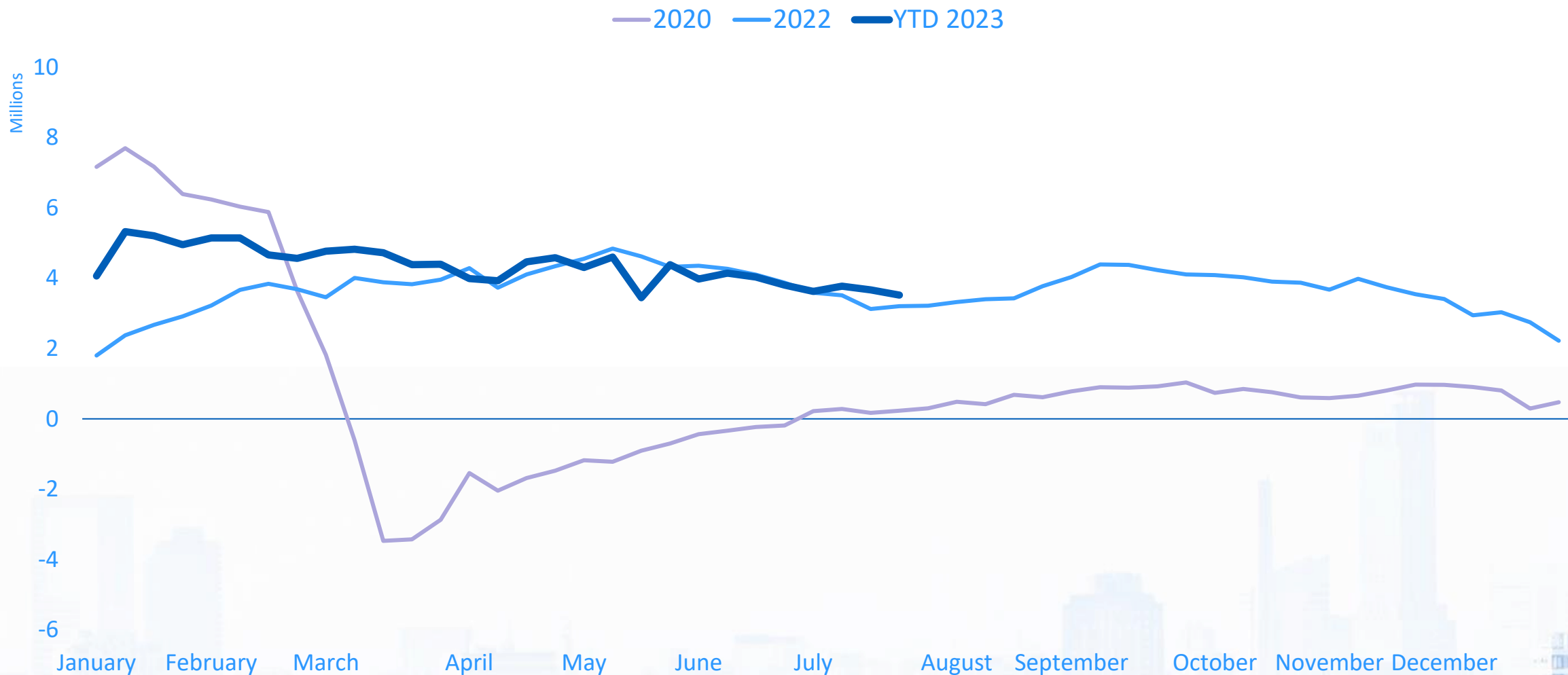




Europe

# Airline Year-on-Year Net Reservations | Europe

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



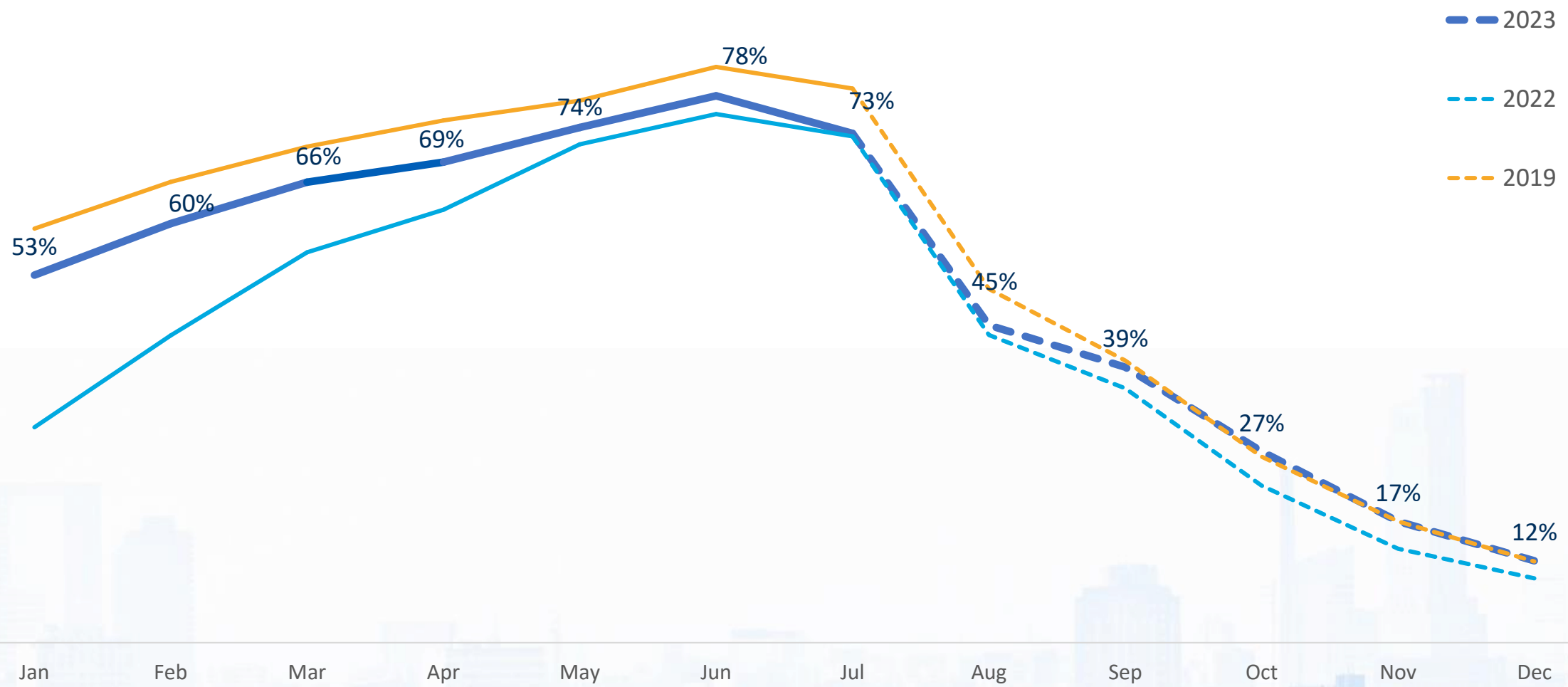
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# Monthly Occupancy & Year-on-Year Variance | Europe

2023 occupancy by month compared to 2022 and 2019.

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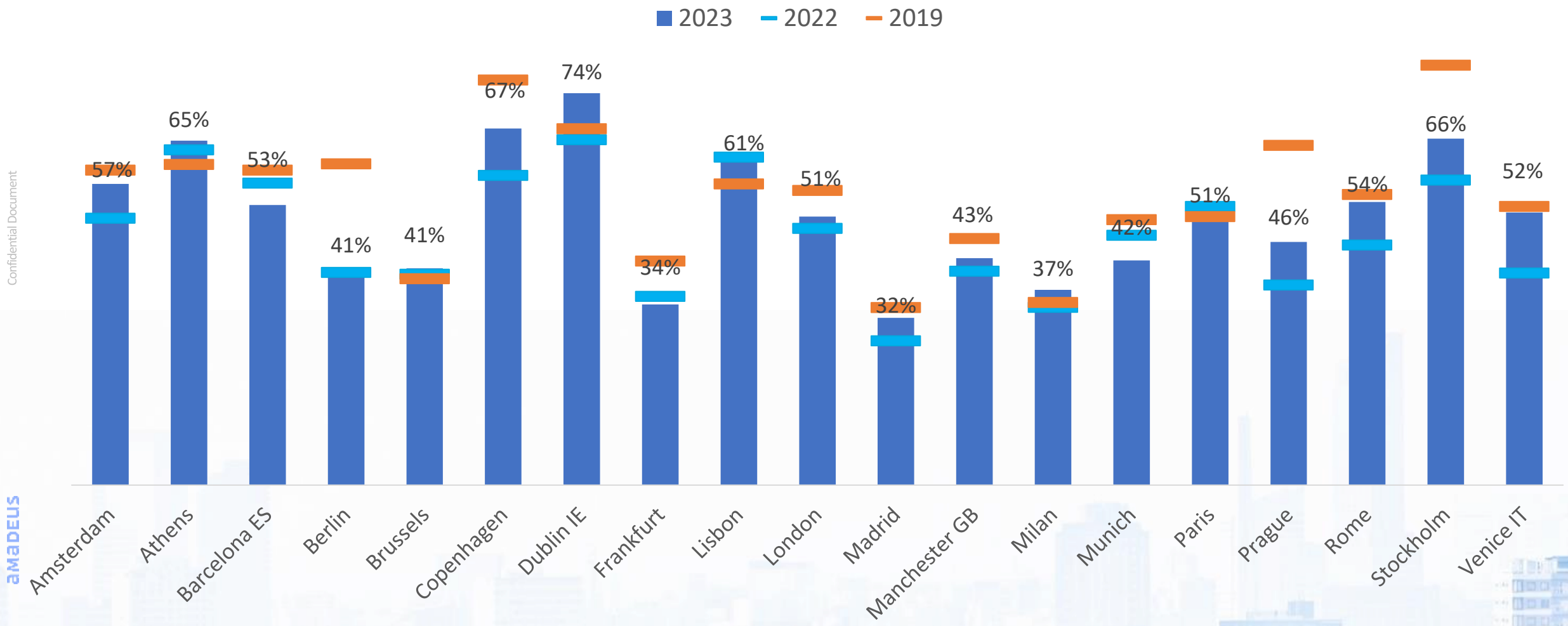


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# Occupancy & Pace by Market | Europe

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

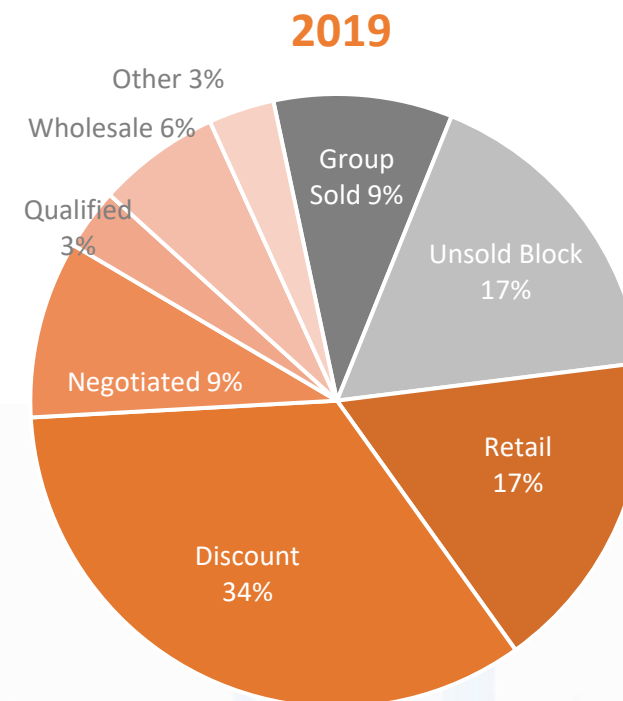
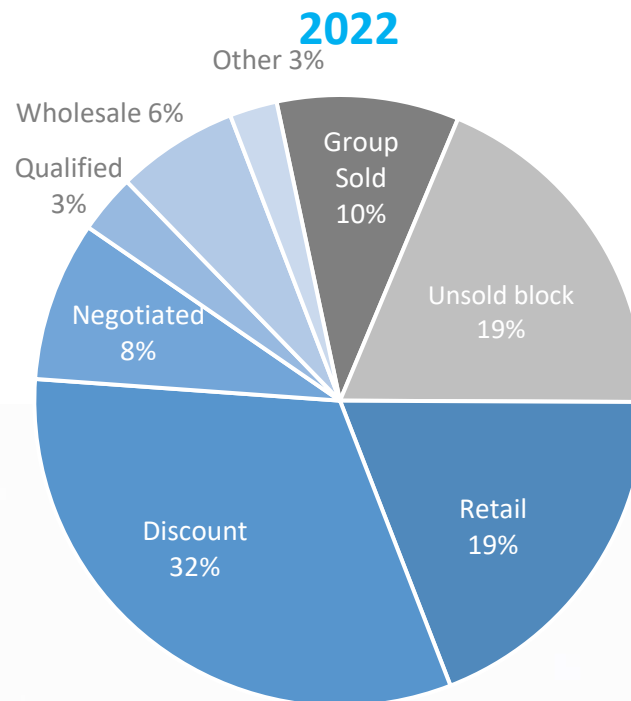
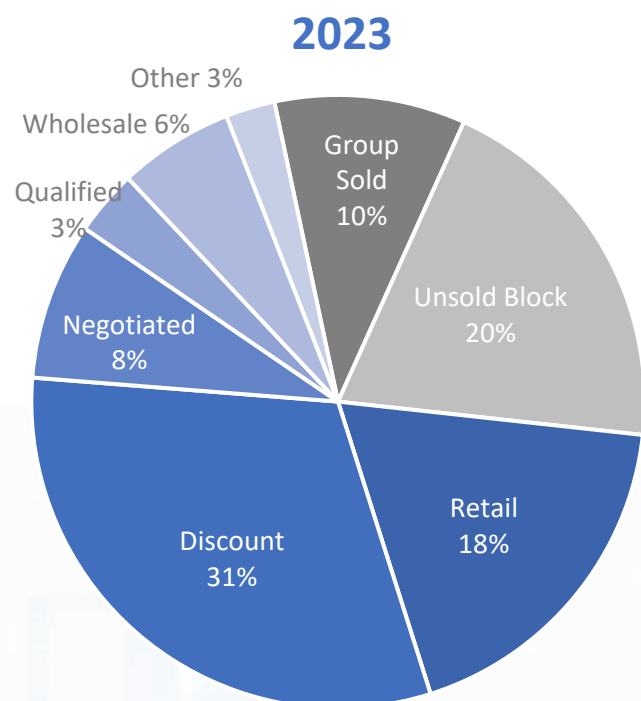


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# Year-on-Year Segmentation | Europe

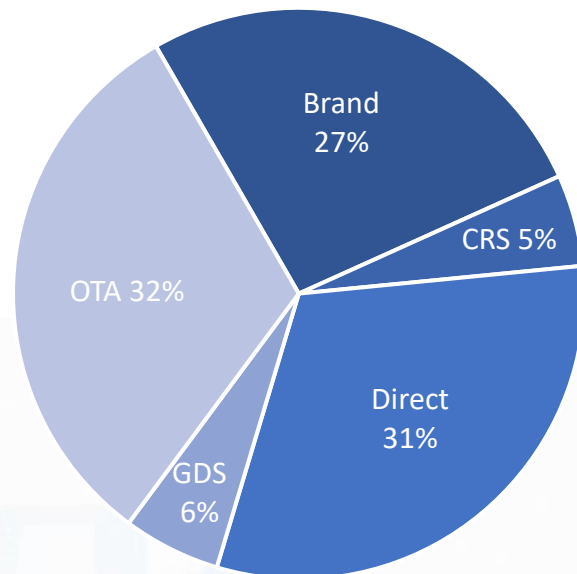
On-the-books market segmentation mix for August 2023 vs. same time last year and in 2019.



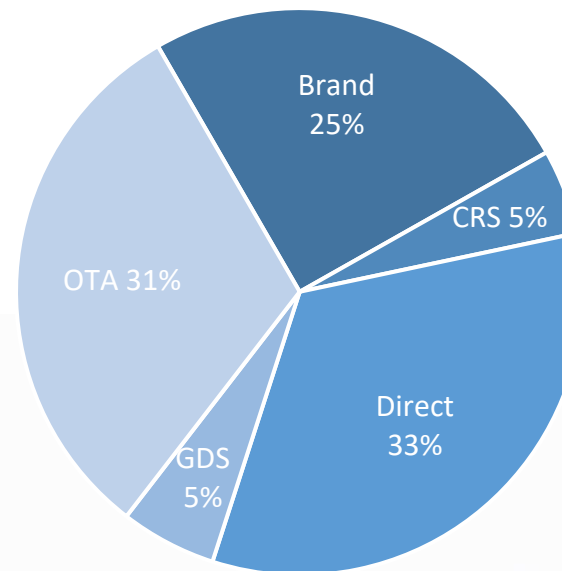
# Year-on-Year Channel Mix | Europe

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

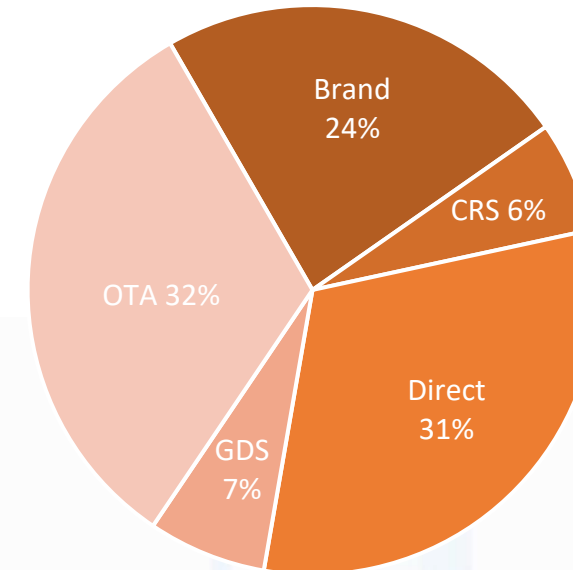
2023



2022



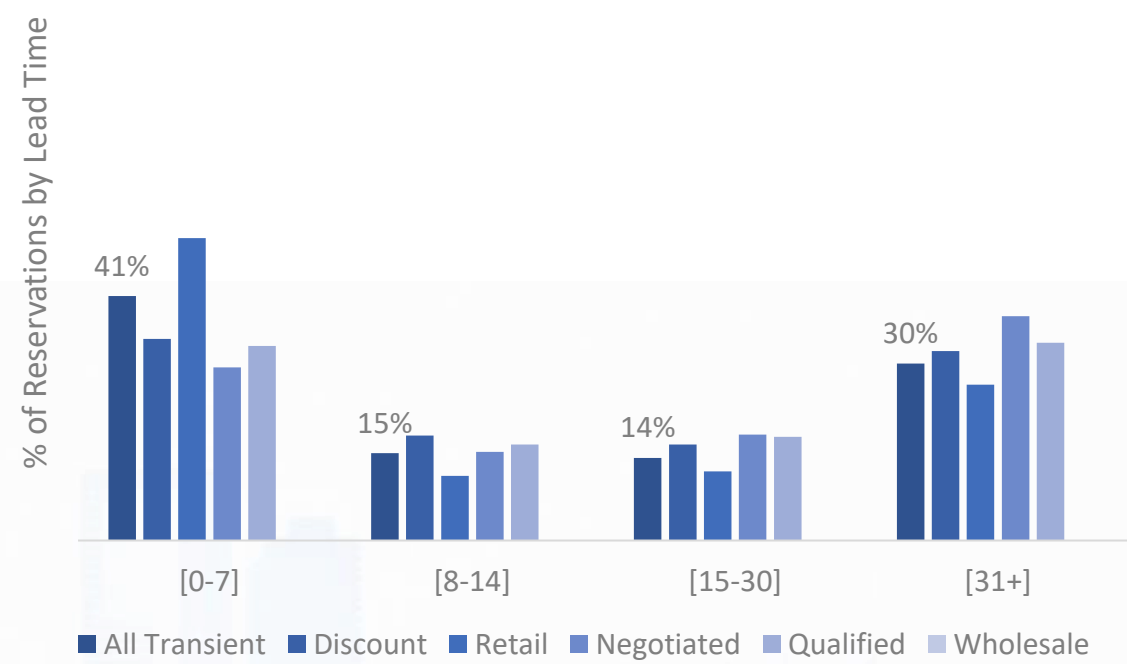
2019



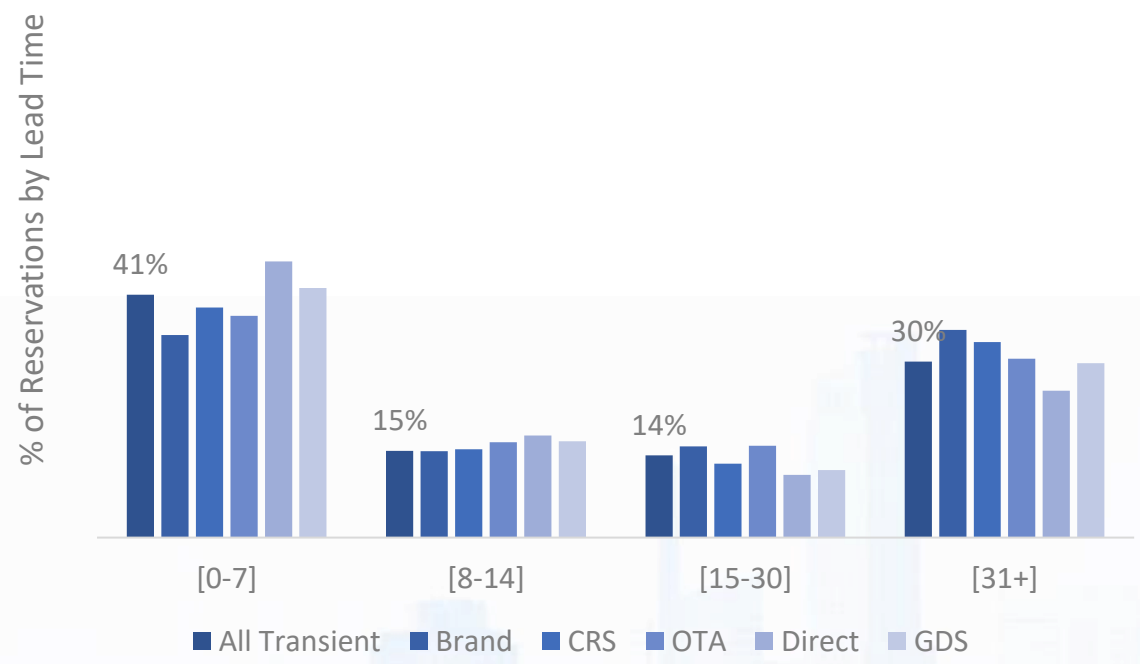
# Transient Lead Time by Segment & Channel | Europe

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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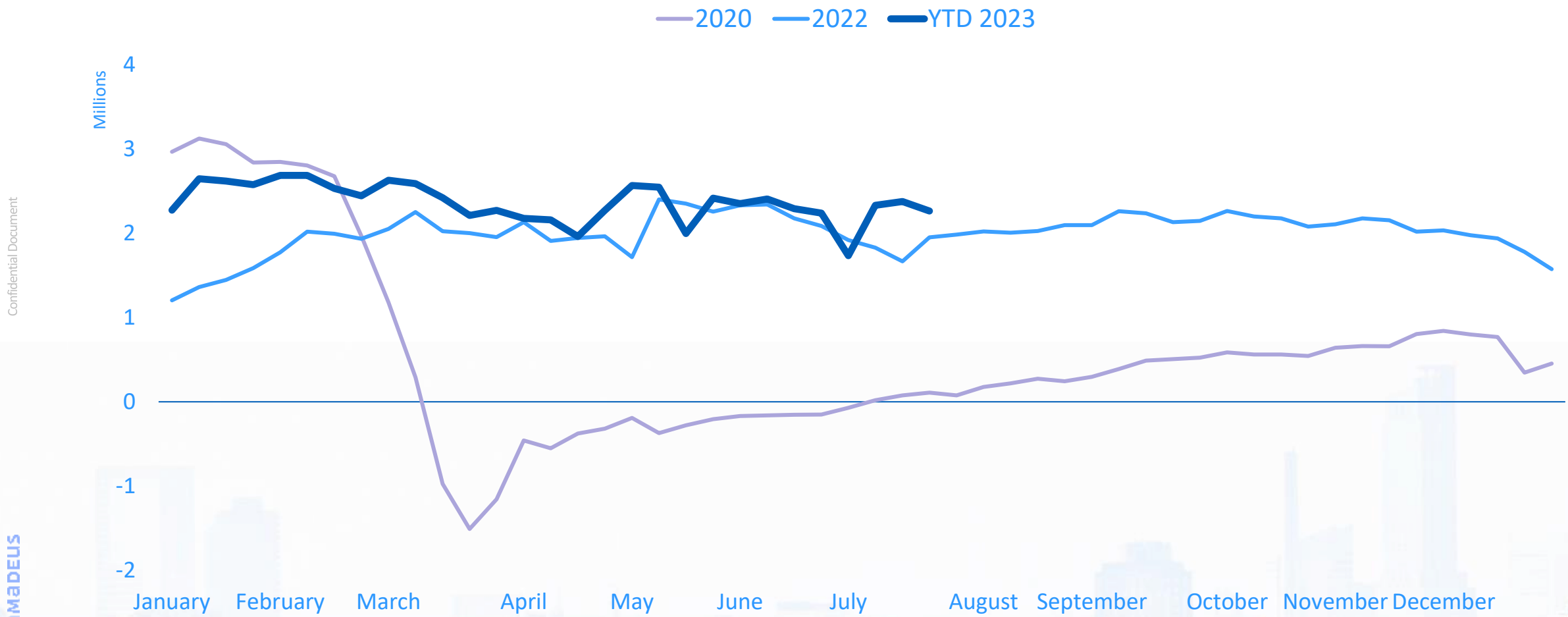
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# Middle East & Africa



# 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.



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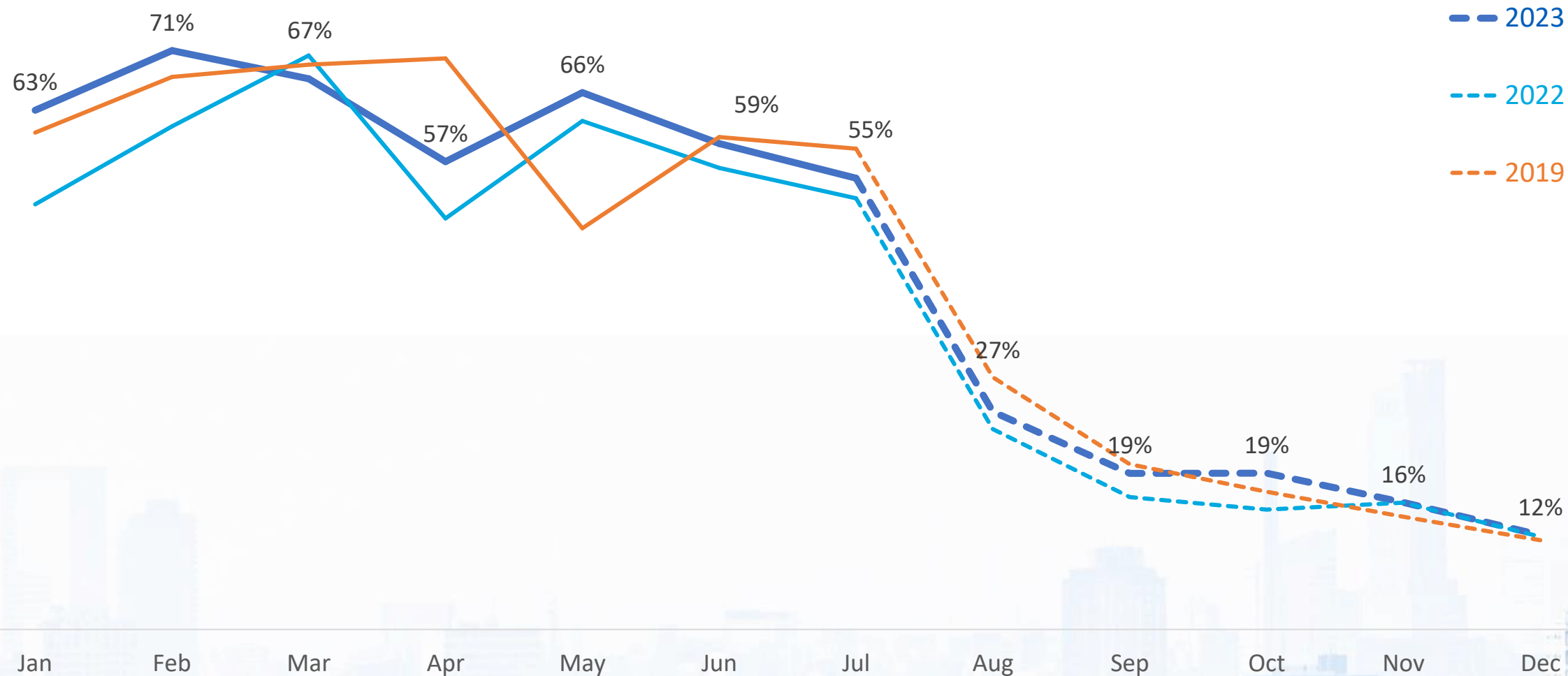
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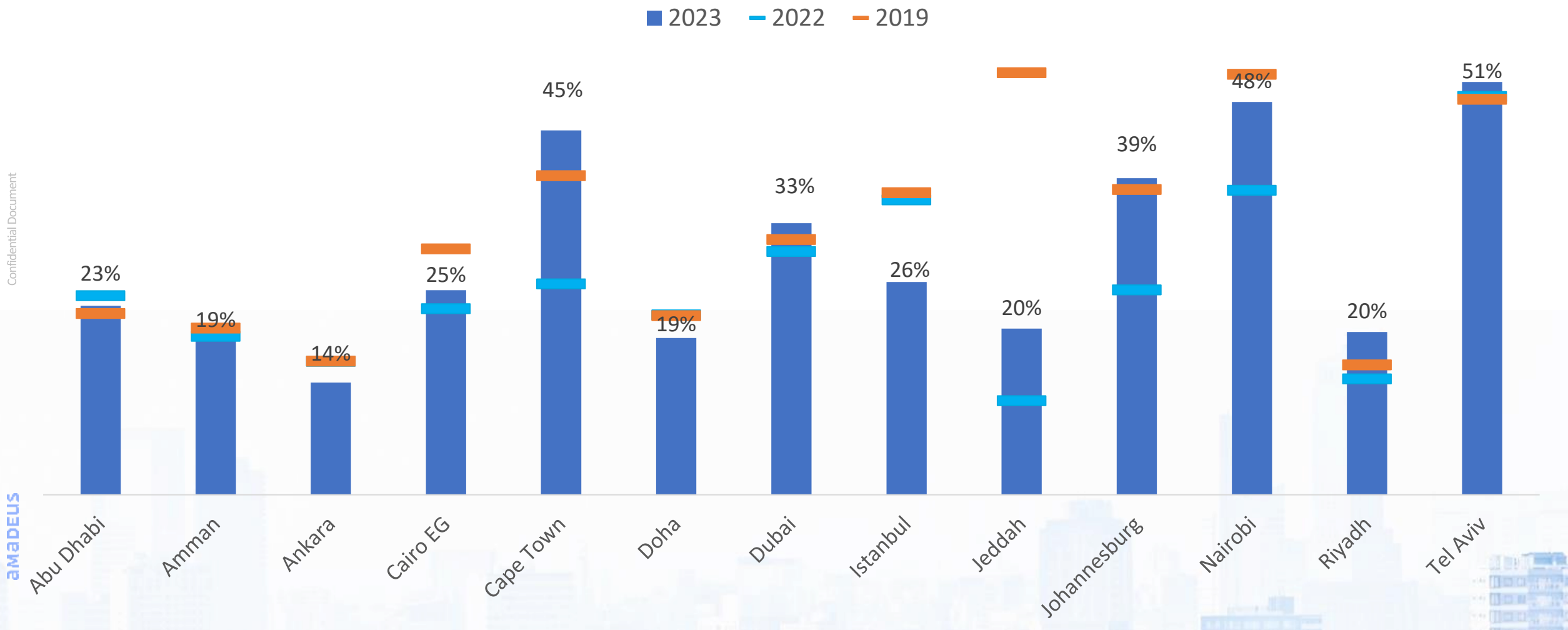
# Monthly Occupancy & Year-on-Year Variance | Middle East & Africa

2023 occupancy by month compared to 2022 and 2019.



# Occupancy & Pace by Market | Middle East & Africa

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



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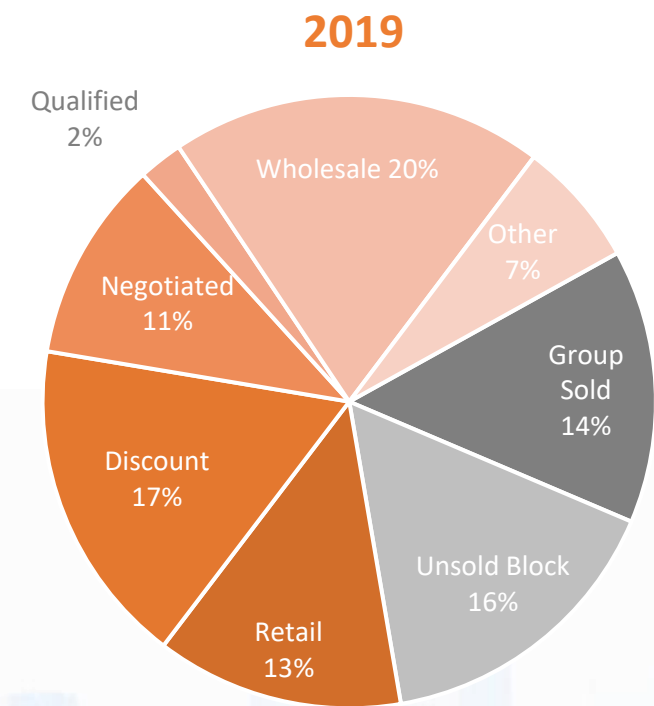
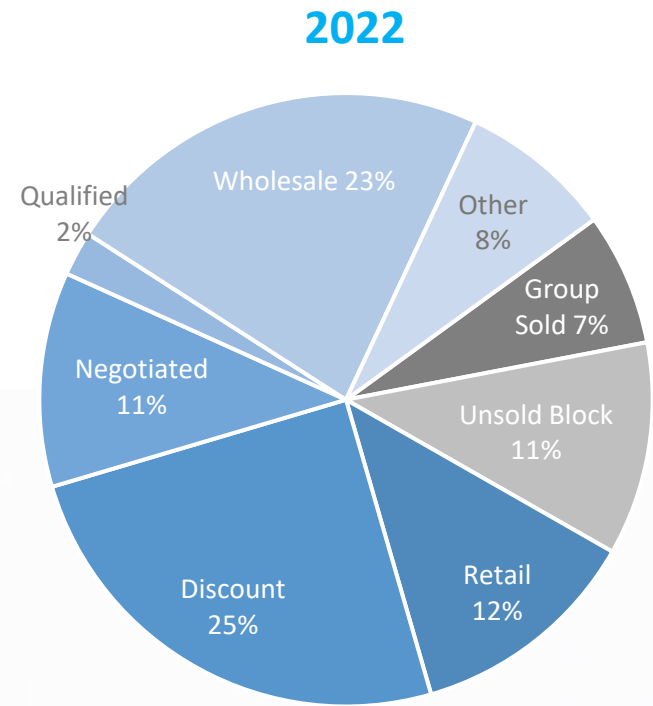
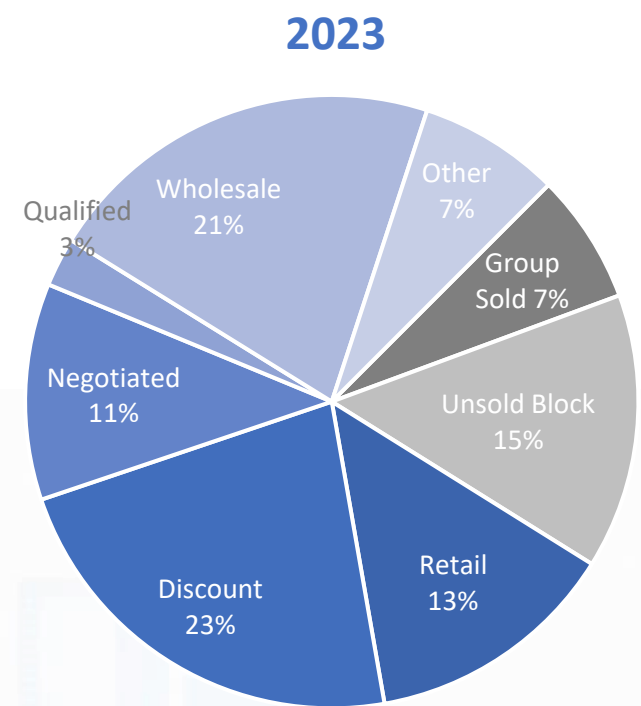


# Year-on-Year Segmentation | Middle East & Africa

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

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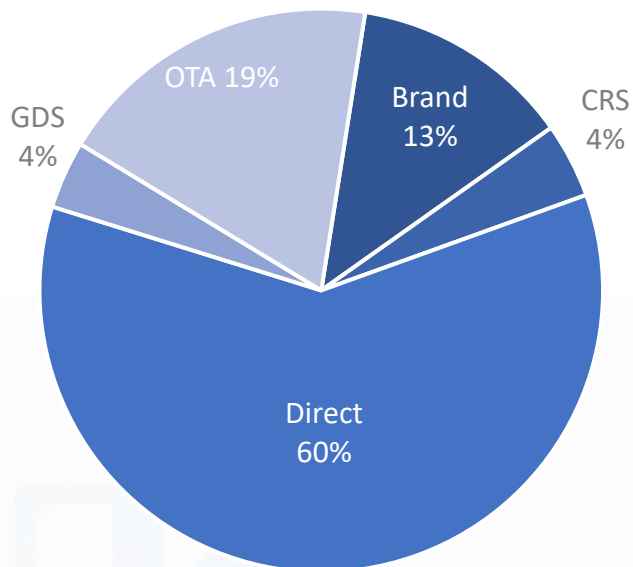
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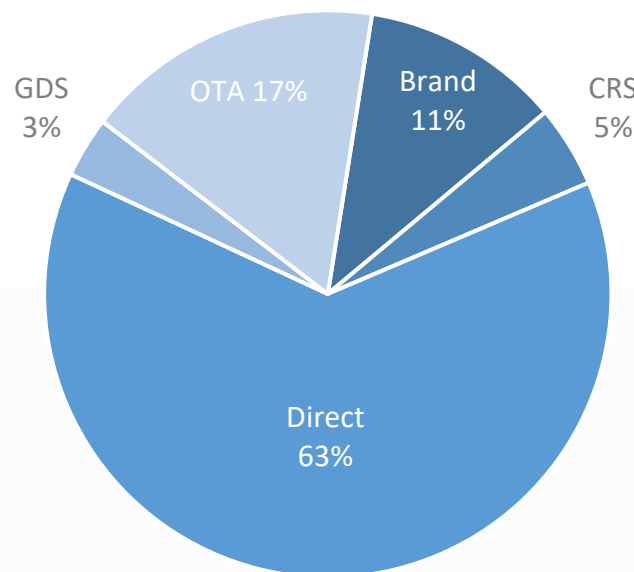
# Year-on-Year Channel Mix | Middle East & Africa

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

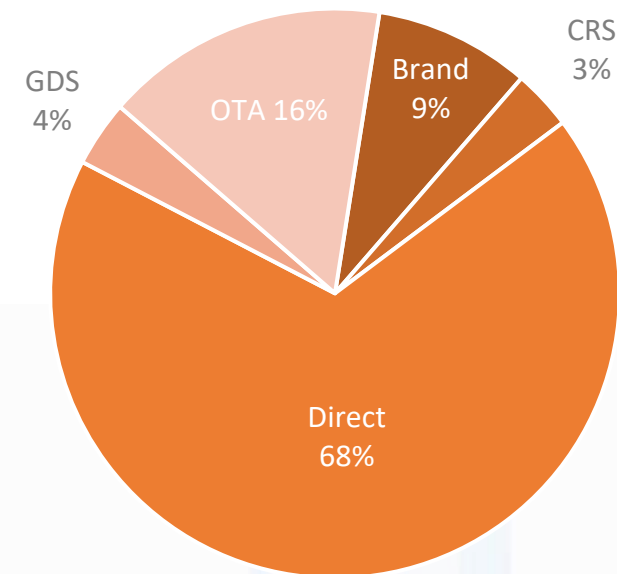
### 2023



### 2022



### 2019



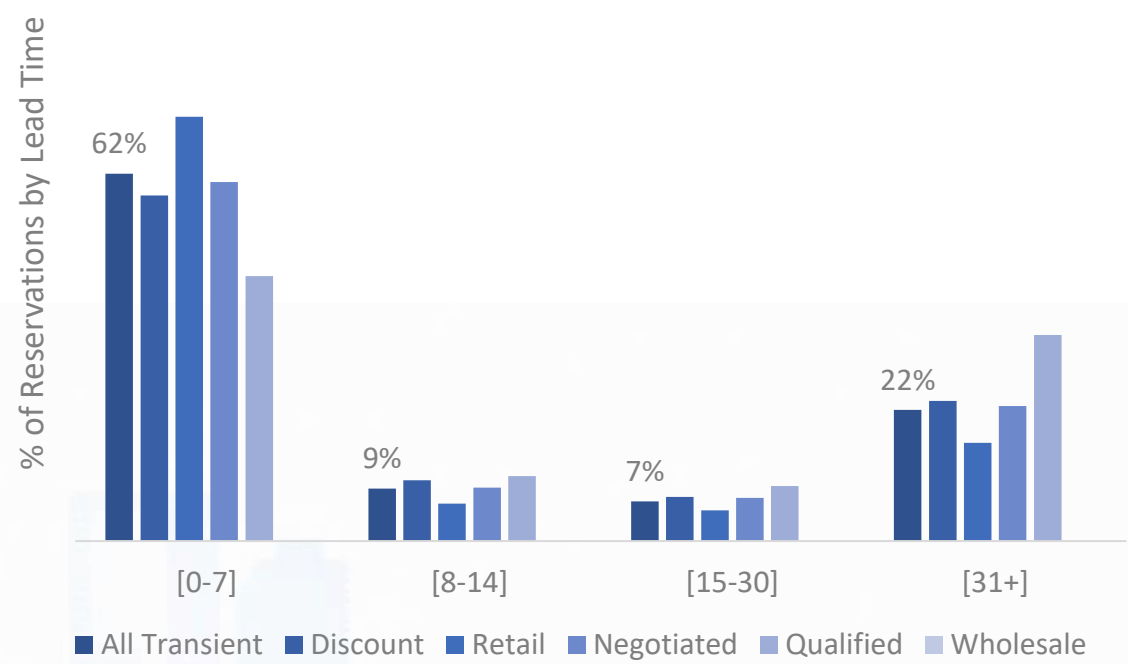
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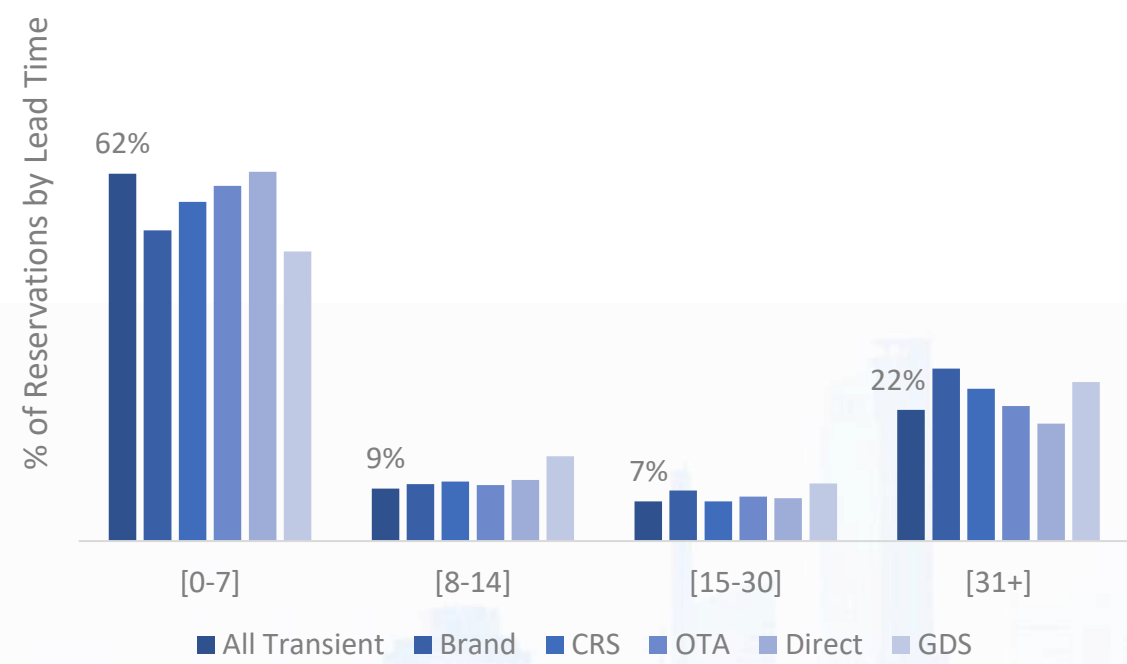
# Transient Lead Time by Segment & Channel | Middle East & Africa

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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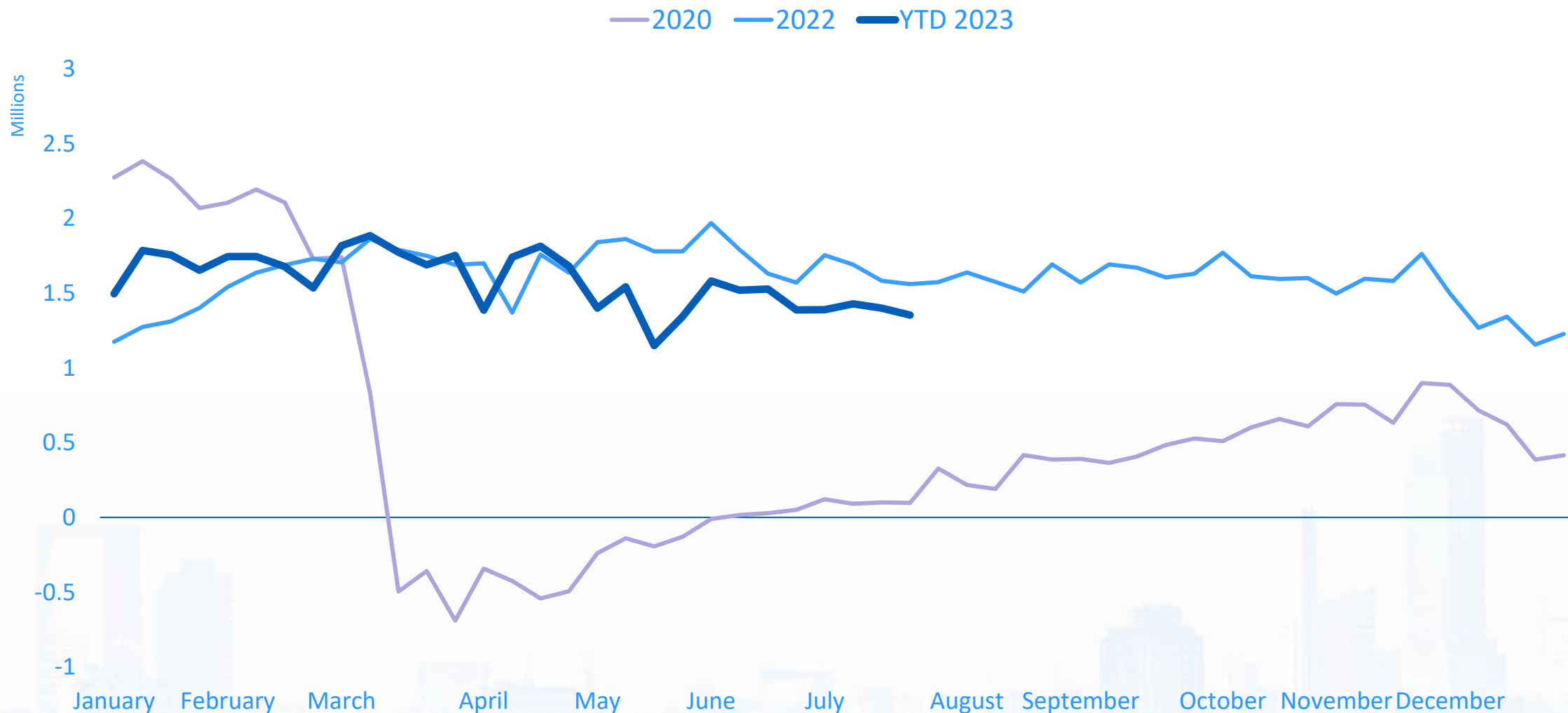
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Latin America

# Airline Year-on-Year Net Reservations | Latin America

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



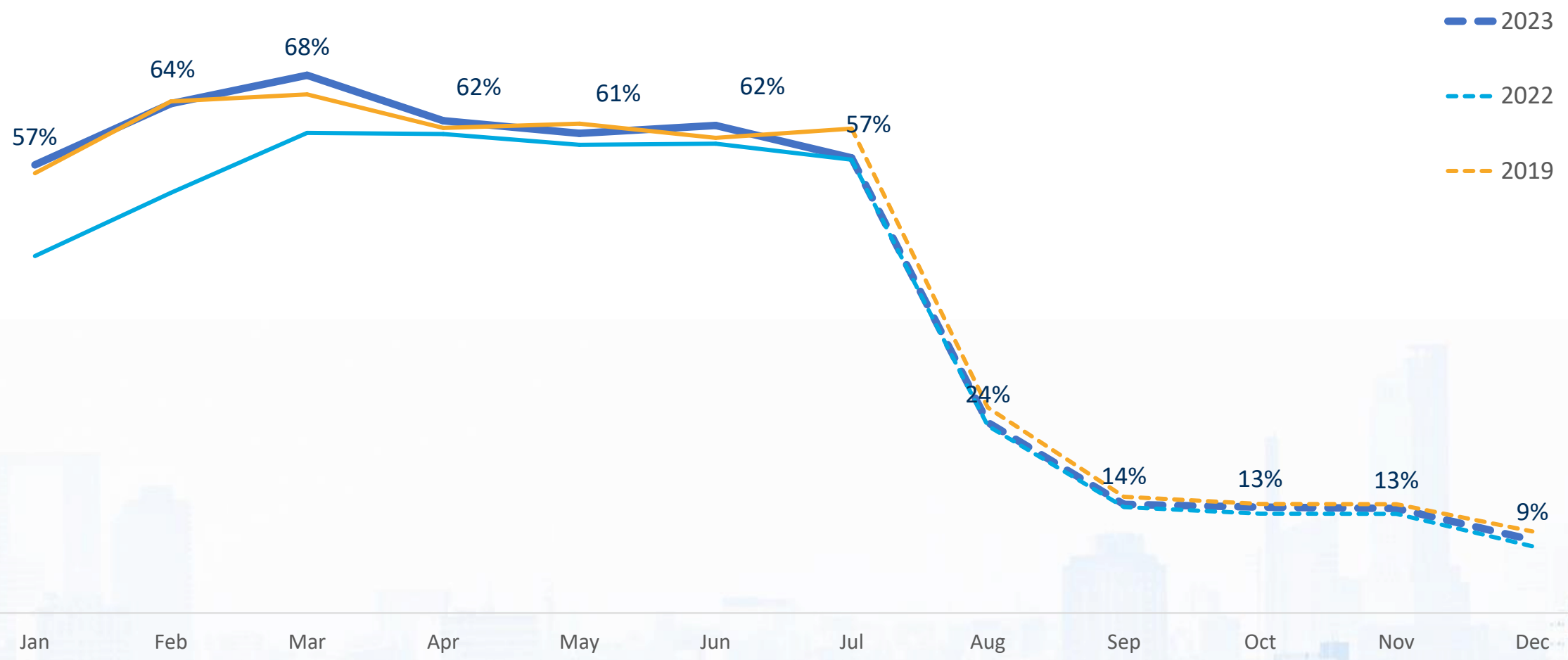
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# Monthly Occupancy & Year-on-Year Variance | Latin America

2023 occupancy by month compared to 2022 and 2019.

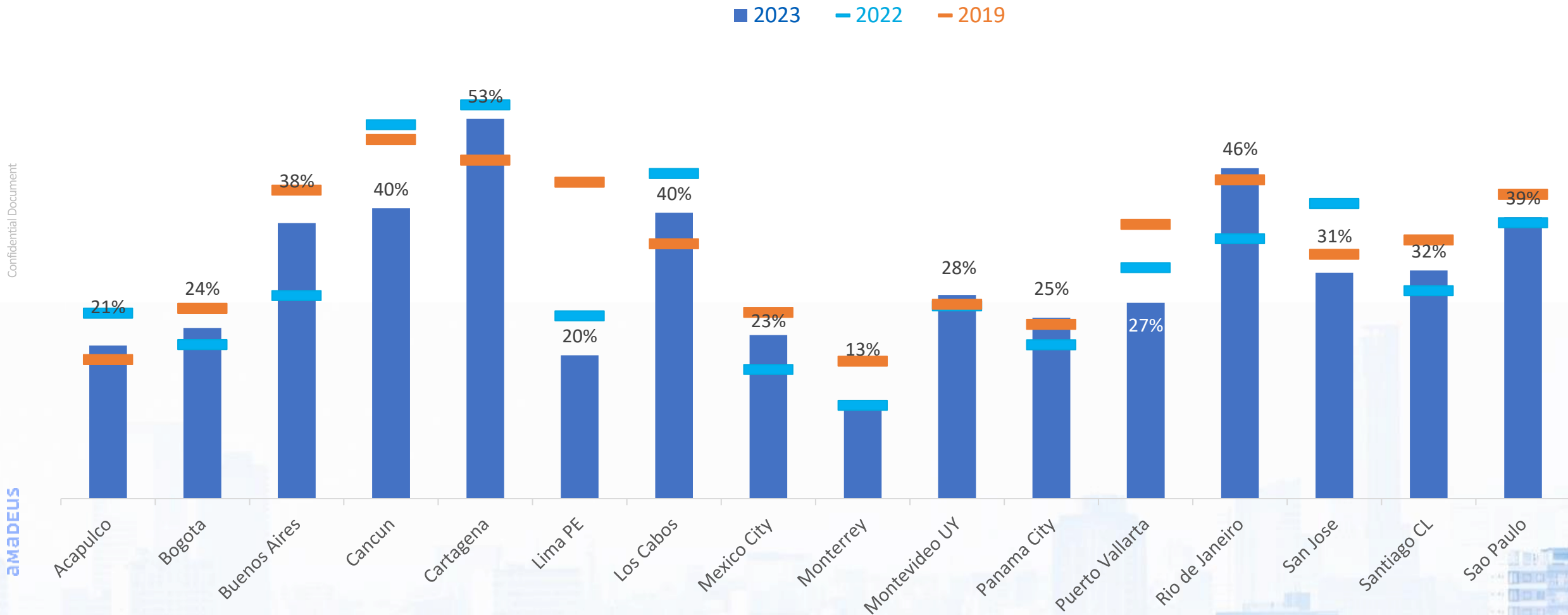
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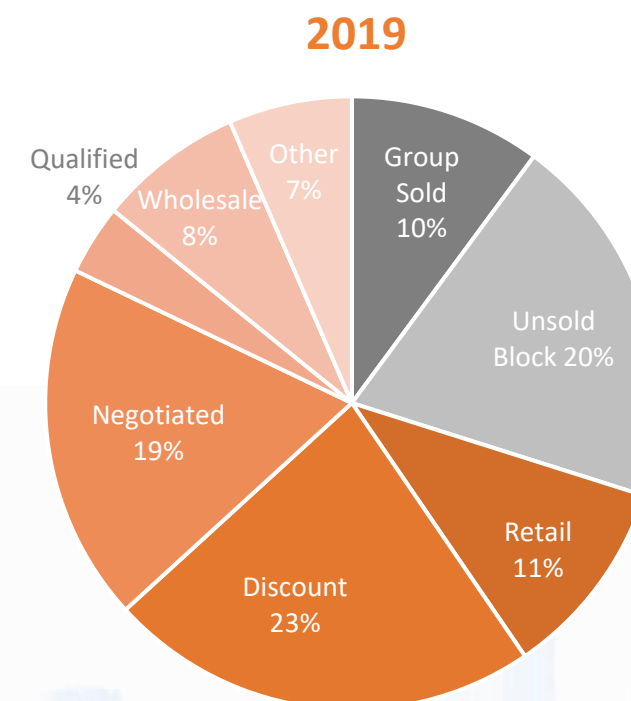
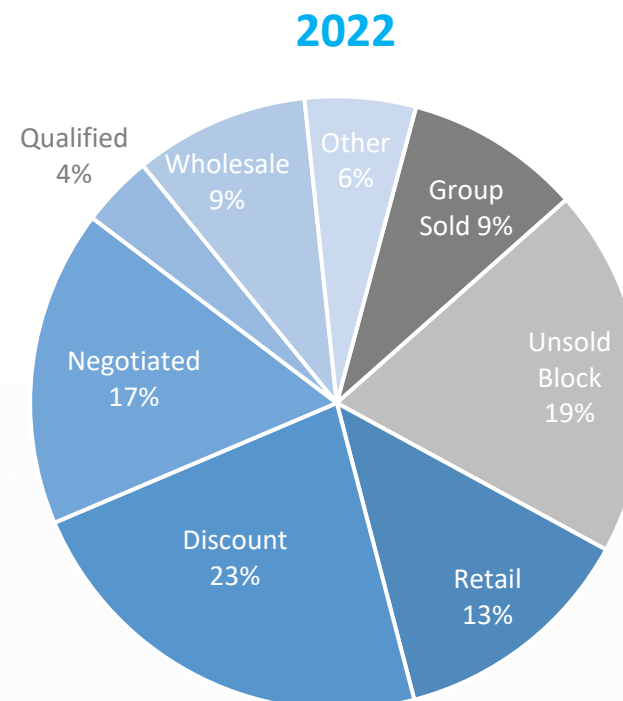
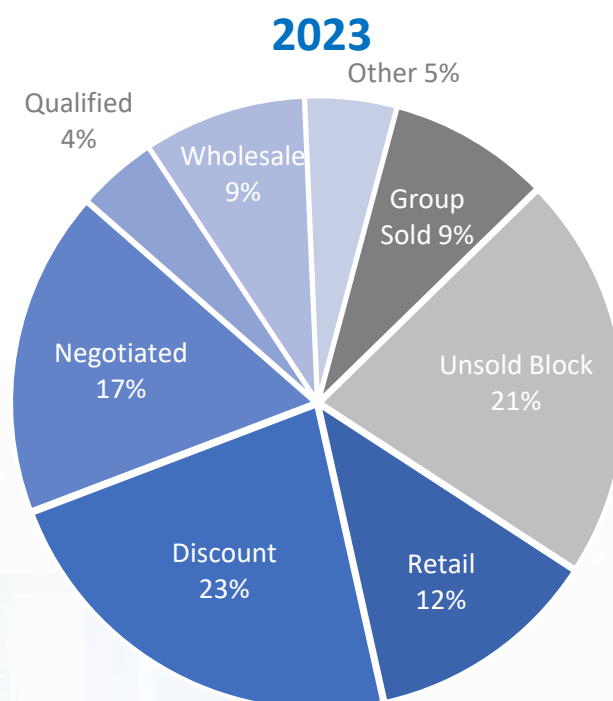
# Occupancy & Pace by Market | Latin America

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



# Year-on-Year Segmentation | Latin America

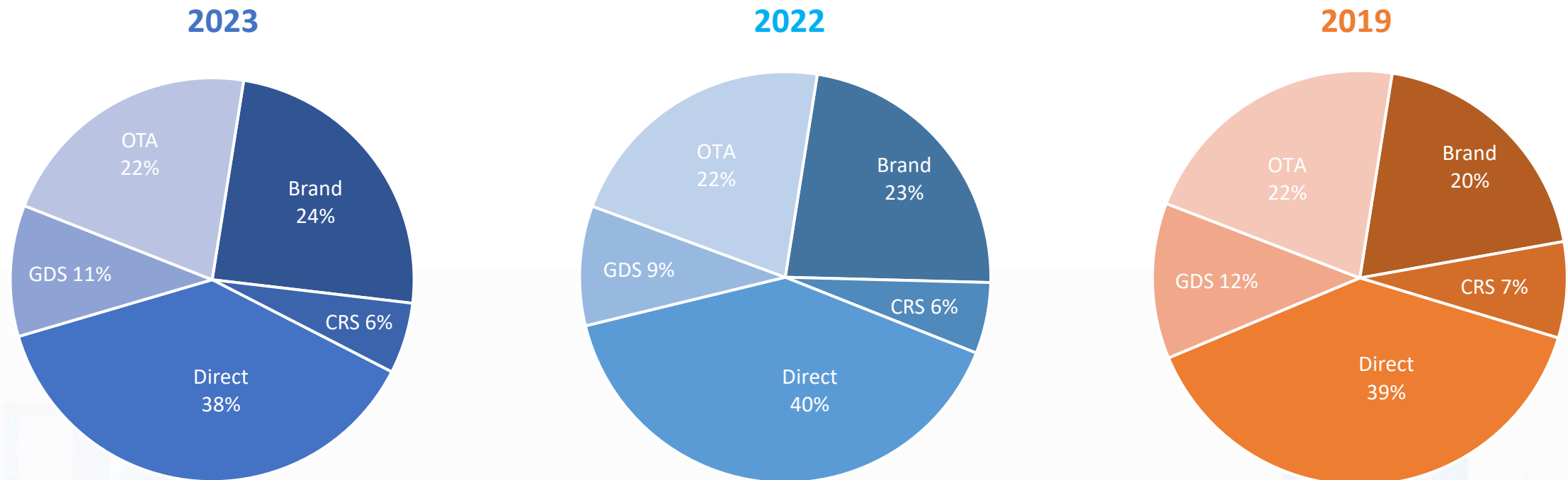
On-the-books market segmentation mix for August 2023 vs. same time last year and in 2019.





# Year-on-Year Channel Mix | Latin America

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



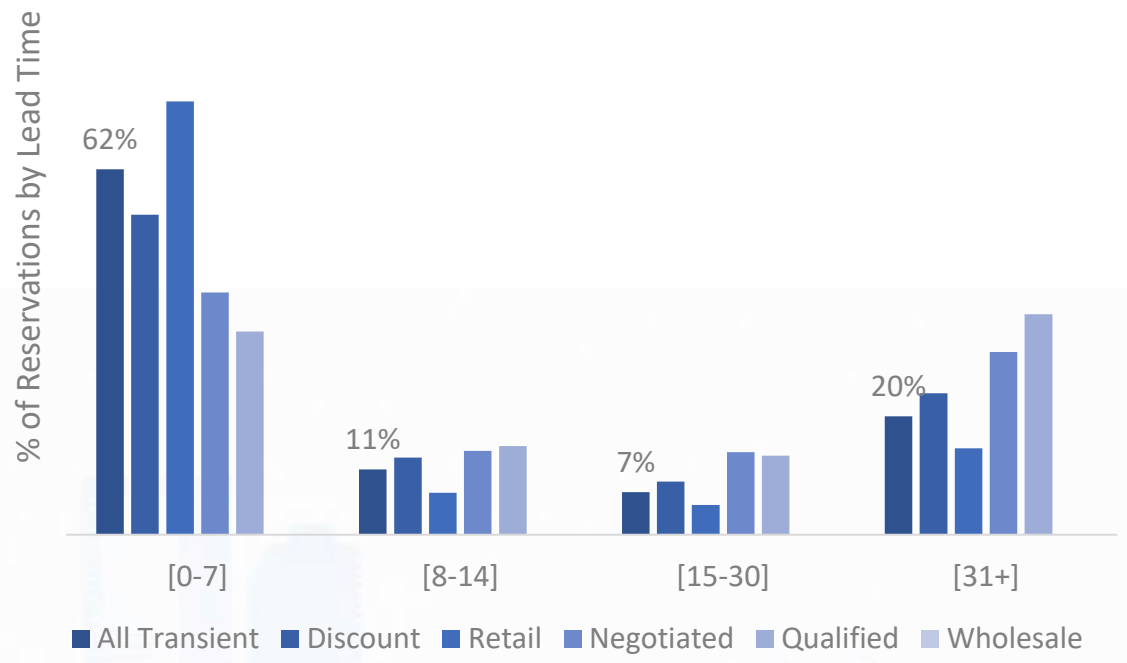
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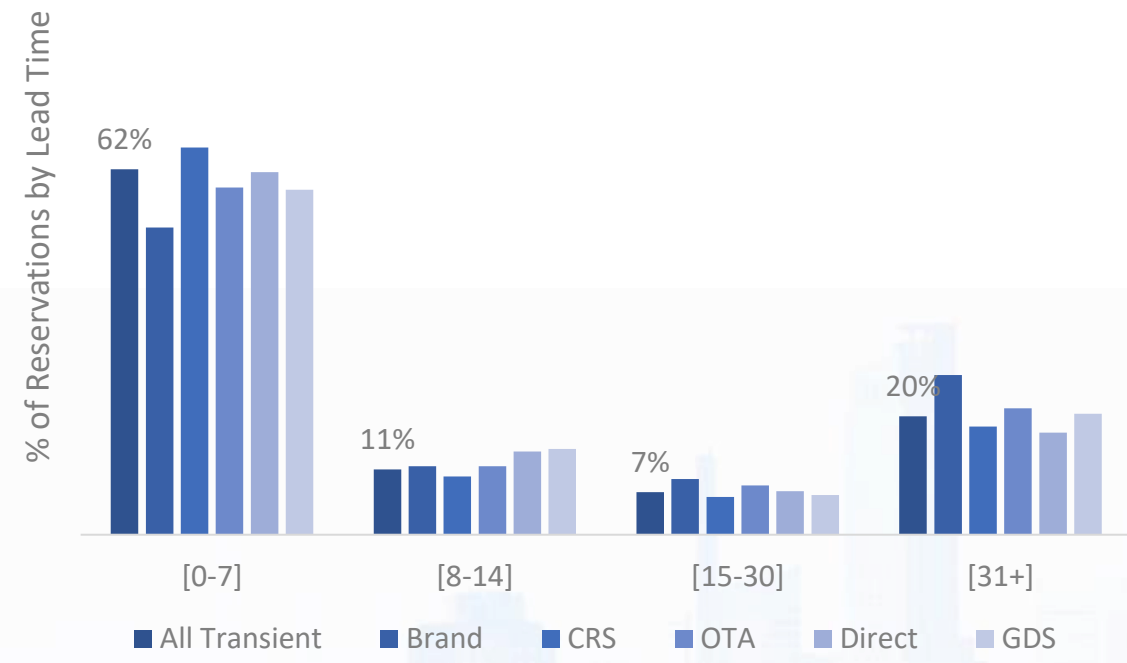
# Transient Lead Time by Segment & Channel | Latin America

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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