



# POWER-UP

EDUCATION & NETWORKING EVENT

**BANGKOK**  
20 MAR 2024

meet share learn unwind



**FOR COMMERCIAL HOTELIERS**



**amadeus**

**eme**  
emarketingeye



# Catalysts for Change



**EDWARD WRIGHT, CMP**

Vice President - Asia

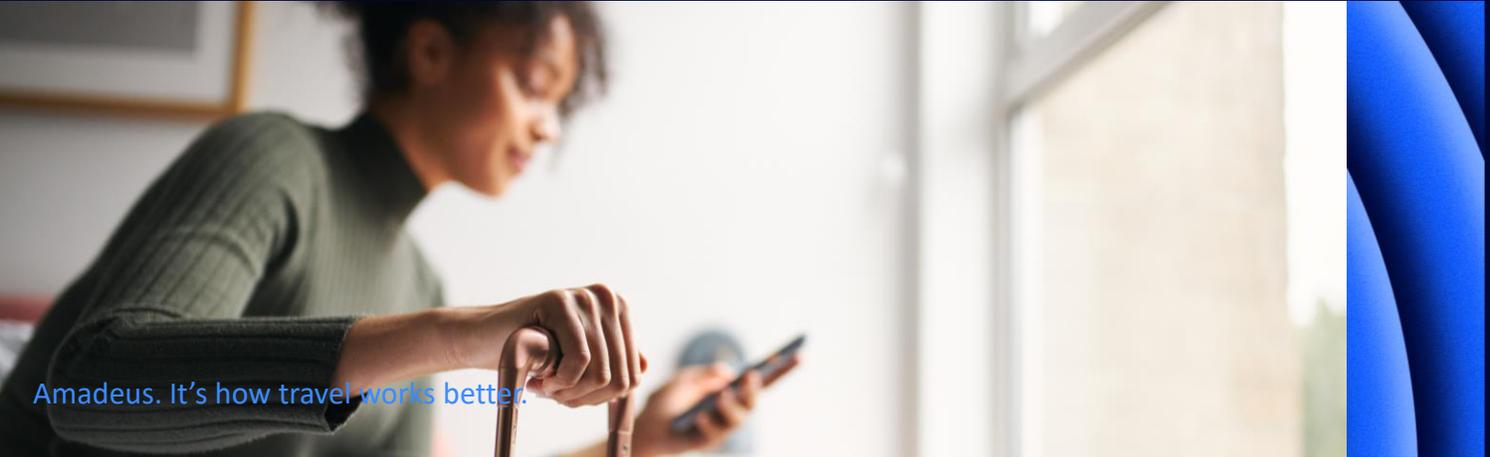
Amadeus Hospitality



**aMADEUS**

# *Catalysts for Change*

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**01** What's Happening in the Market?

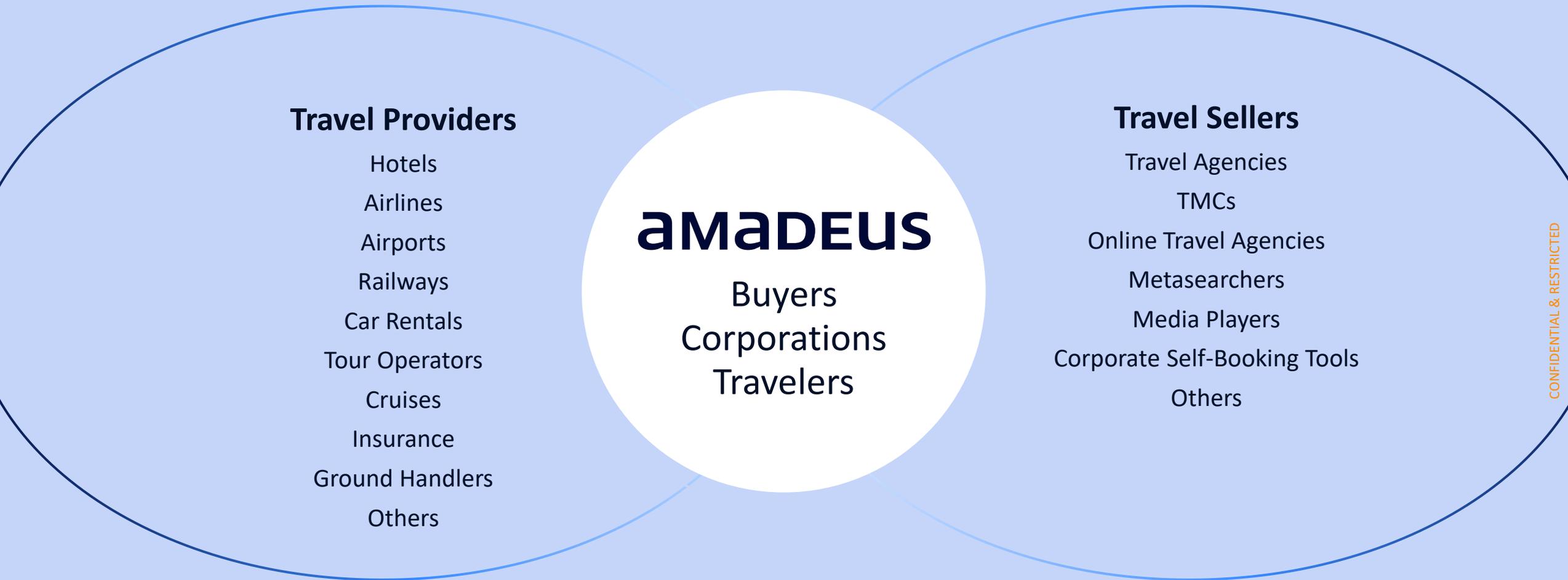
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**02** Understanding the Catalysts for Change

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# About Amadeus



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# Amadeus – It's how travel works smarter

## Hotel Brands & Management Companies



## Destinations



## Airlines



## Airports



## Corporations



## Travel Agencies & Providers



# Serving all areas of the travel community.



1300+ Hospitality Partnerships



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# Data paints a positive picture in the year ahead for the global hospitality market



# Hotel Occupancy by Region | Worldwide

On-the-books hotel occupancy by region for February 2024 vs. same time last year and 2019.

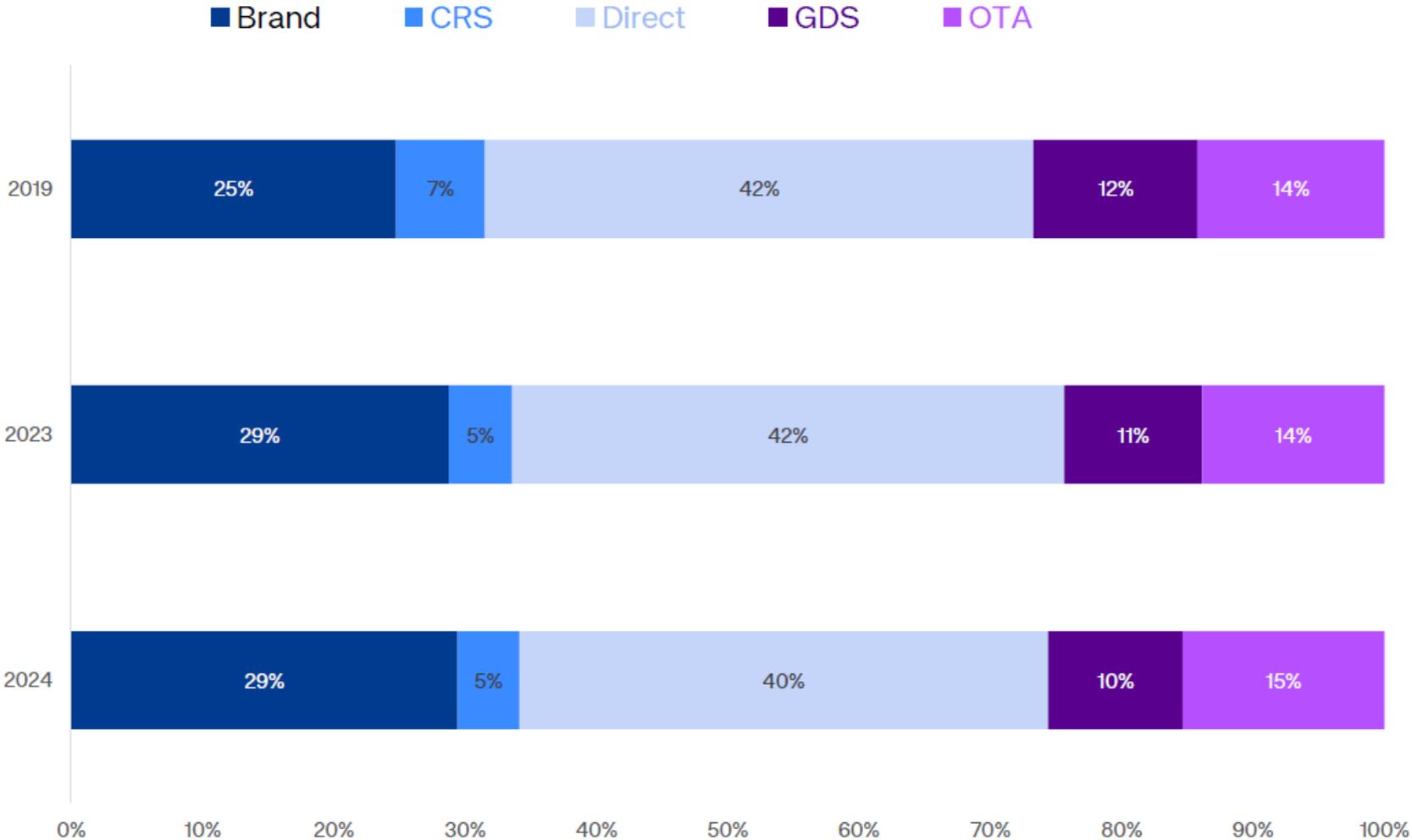


## Highlights

- Worldwide Hotel Occupancy is aligned with same time last year and remains below 2019
- Middle East & Africa is the region with the largest growth vs 2019
- China is experiencing a growth of 57% YoY.

# Hotel Channel Mix | Worldwide

On-the-books channel mix for February 2024 vs. same time last year and 2019.

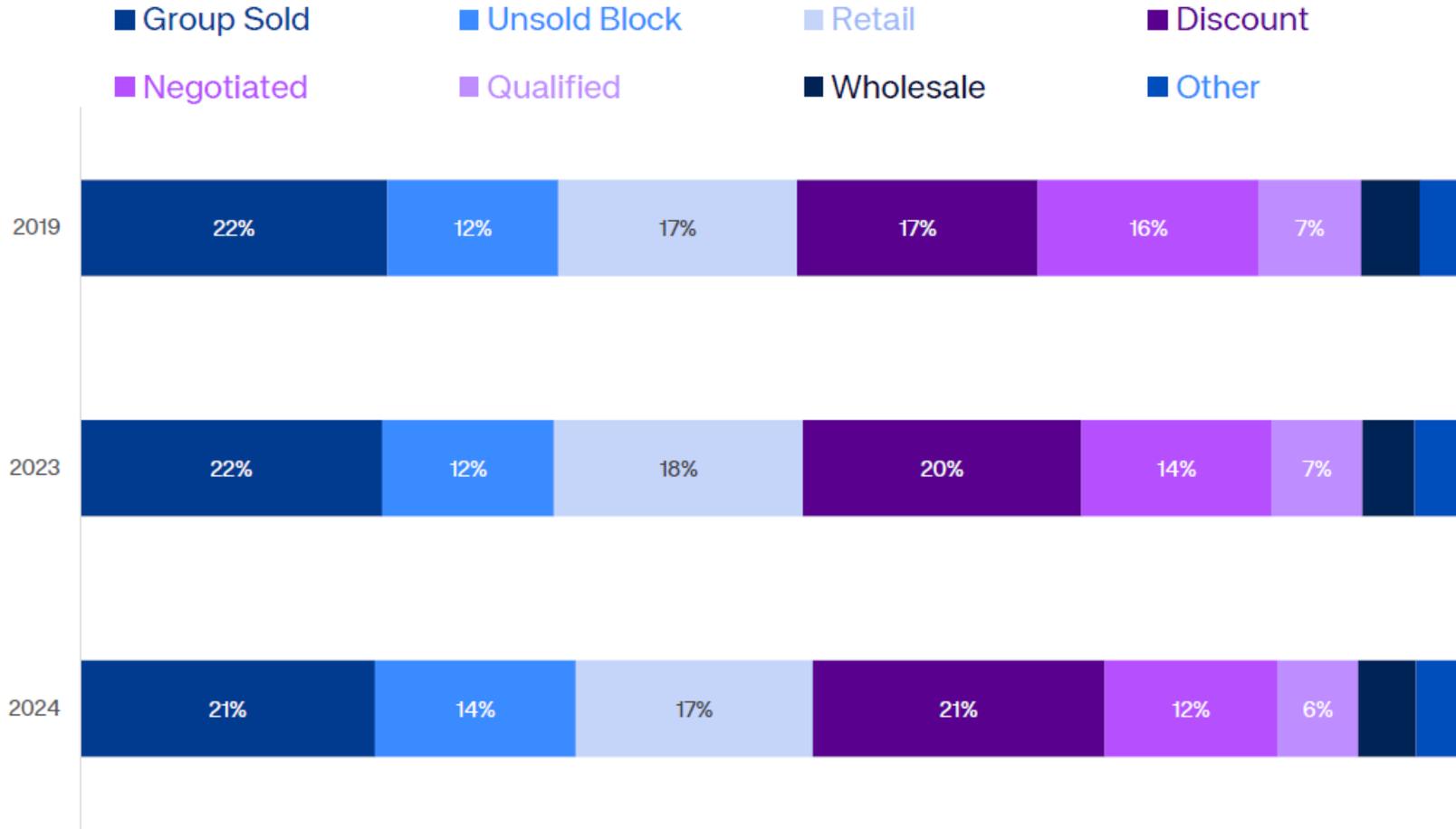


## Highlights

- Direct business remains the largest booking channel yet losing few points in February to OTAs.
- Brand is the second largest Channel, with larger shares than in 2019 and stable from last year

# Hotel Segmentation | Worldwide

On-the-books segmentation for February 2024 vs. same time last year and 2019.

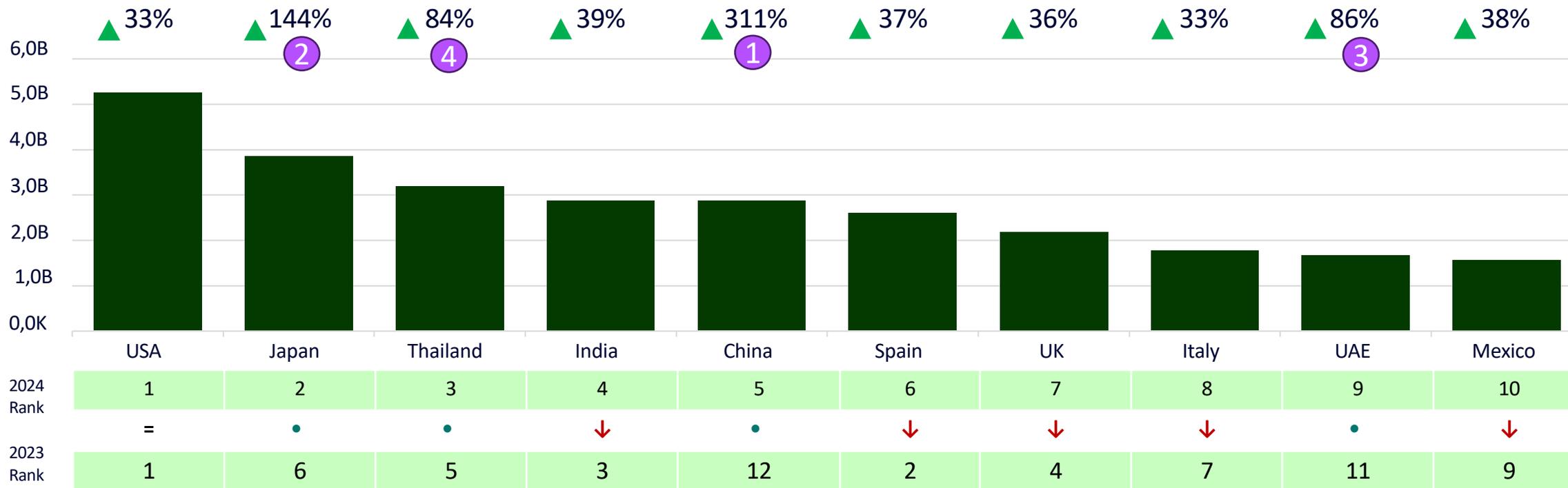


## Highlights

- Group business continues growing with higher shares than in 2019 (35% between Sold and Block). Group confirmations are materializing later this February than last year and in 2019.
- Retail and Negotiated shares have slightly dropped vs. other segments compared to last year.

Top 10 most searched markets see a positive year-over-year growth. China, Japan, the UAE and Thailand stand out as the best growing markets.

TOP SEARCHED DESTINATIONS IN 2024, JANUARY TO APRIL, in absolute volumes and rank of searches. %'s indicates 2024 year-over-year growth.



- China's search volumes surged by 311% YoY, tripling last year's record.
- Similarly, Japan doubling its global search volumes, registering a 144% YoY increase.

# Top 10 Cities for Airline Outbound | Worldwide

Understand how most searched cities rank against the most booked cities in February 2024

| Top 10 Searched cities      | Vs. | Top 10 Booked cities     |
|-----------------------------|-----|--------------------------|
| 1 Bangkok, Thailand         | =   | 1 Bangkok, Thailand      |
| 2 Tokyo, Japan              | ↘   | 2 Dubai, UAE             |
| 3 London, UK                | ↘   | 3 Tokyo, Japan           |
| 4 Dubai, UAE                | ↗   | 4 Cancun, Mexico         |
| 5 Seoul, Korea (ROK)        | ↘   | 5 Osaka, Japan           |
| 6 Paris, France             | ↓   | 6 London, UK             |
| 7 US: Others                | ↘   | 7 Taipei, Chinese Taipei |
| 8 Delhi, India              | =   | 8 Delhi, India           |
| 9 New York City, USA        | ↓   | 9 Seoul, Korea (ROK)     |
| 10 Hong Kong, Hong Kong SAR | ↓   | 10 US: Others            |

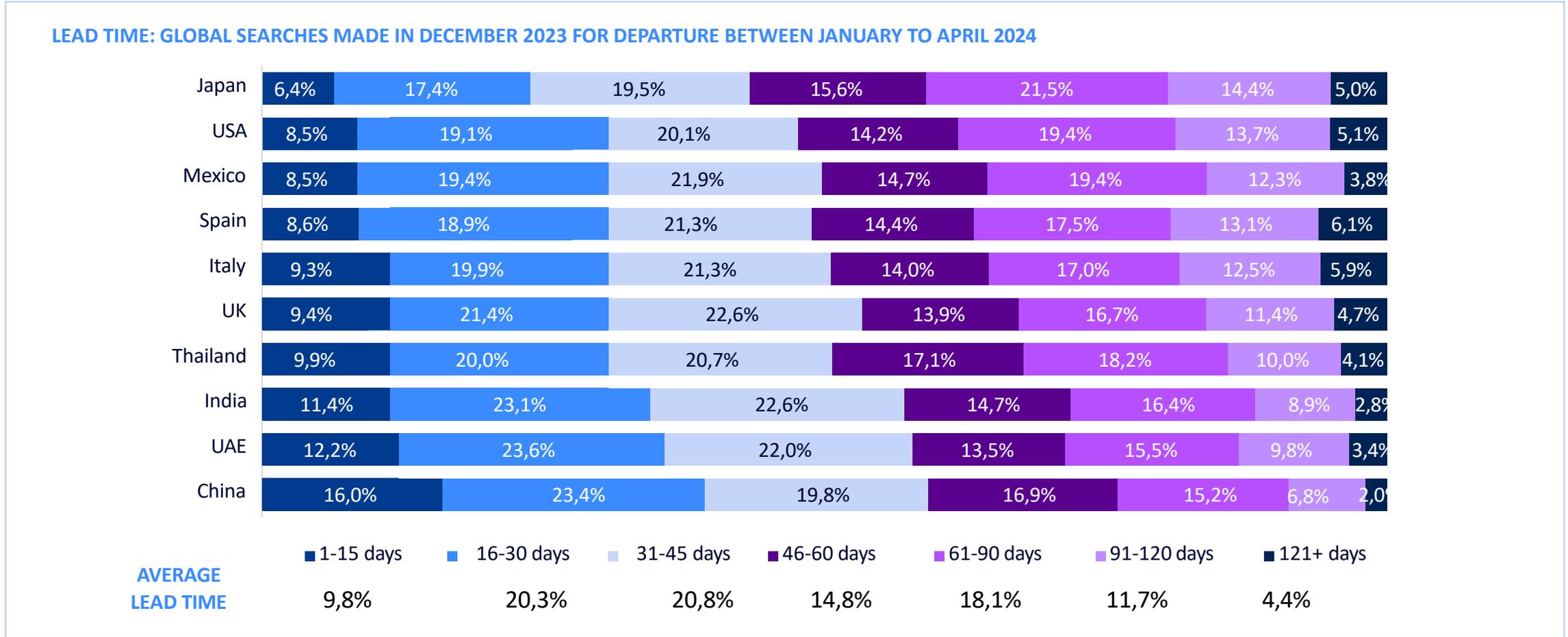
**Legend**

- ↘ Position dropped from searched to booked
- = Same position in top 10 searched and booked
- ↗ Position improved from searched to booked
- ↓ Not one of top 10 booked cities

## Highlights

- The top 3 most searched cities for worldwide travel in February 2024 are Bangkok, Tokyo, and London.
- There is an overlap in the top 10 searched and booked cities worldwide, but while Paris and New York are two of the most searched destinations, they did not make the top 10 booked destinations list.

# The majority of international travellers are searching to travel within one month prior departure.



- 30% of international visitors searching for the world's most sought-after destinations are preparing for their trips within a month of the departure date.

# In the region, travel is firmly on the rise

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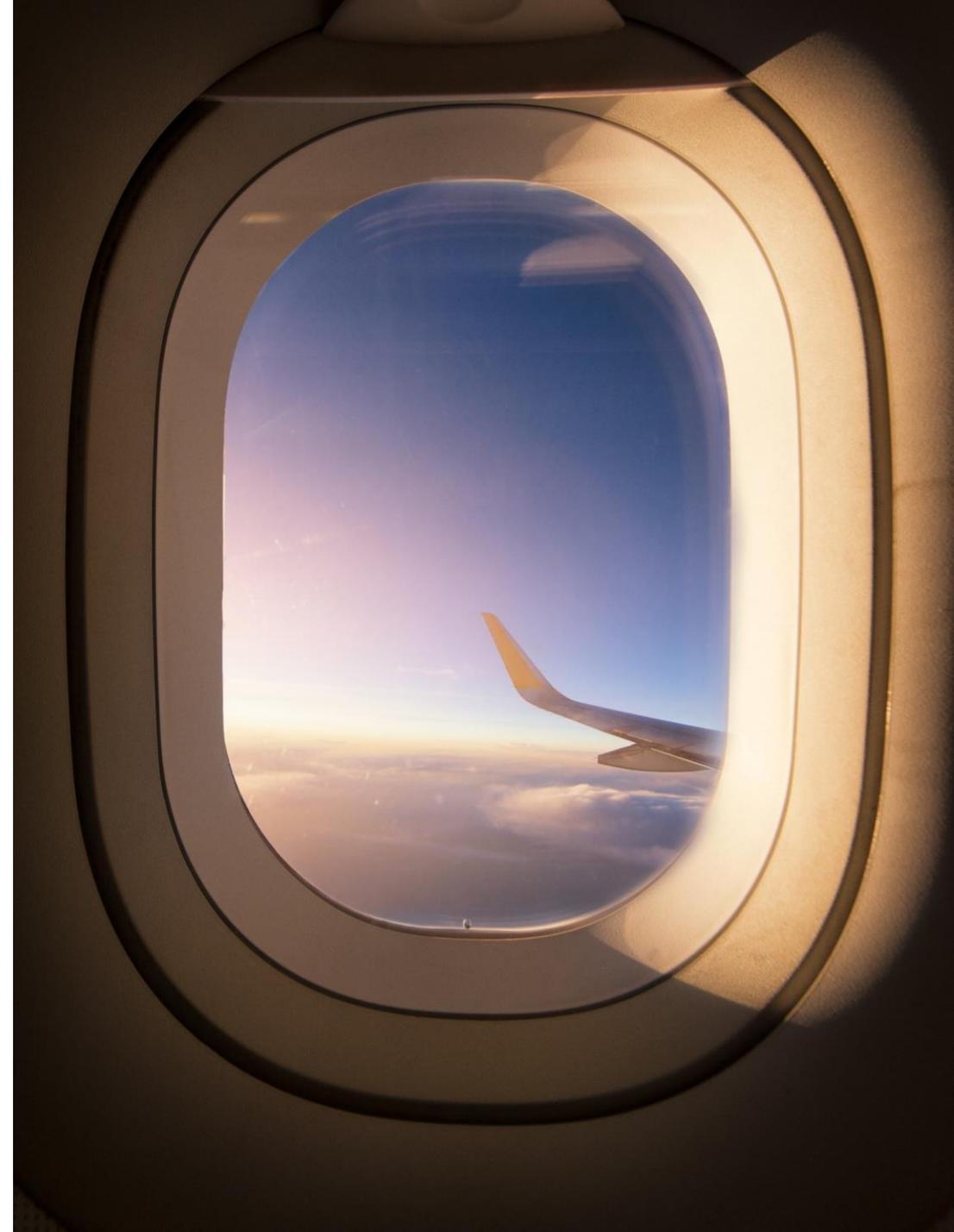


With Easter, Eid and Songkran all on the horizon, the region has high hopes for tourism.

- 194 mil people, 72% of the Indonesian population, expected to travel over Eid
- Songkran set to generate 24 bil THB over 12-16 Apr, see 510k int'l and 4.3 mil domestic trips.

## Commitment to address flight capacity challenges

- Thai Airways confirmed it has ordered 45 Boeing aircraft
- Indonesia's Sandiaga Uno says it will take 350 more planes in Indonesian fleets to bring down fares
- Air India announced an order for US\$70 billion
- SIA group has 100 aircraft on order
- Four Chinese airlines have placed a mega-order for 292 single-aisle A320 family aircraft from airbus



# Music Tourism is a real phenomenon

Projected tourism receipts:

## \$350m to \$500m

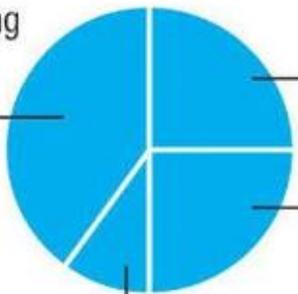
Estimated breakdown of tourism receipts:

Airfare and local transport, among other things

**40%**

Food and beverage

**10%**



Accommodation

**25%**

Shopping

**25%**

Ticket sales:

## \$75.2m

Ticket sales revenue retained within Singapore economy:

## \$11.3m

(assuming 85% goes to Swift)

### Flights and bookings:

Singapore-inbound flights

▲ **186%**



Accommodation bookings

▲ **462%**



Attractions and tour bookings

▲ **2,373%**



## Swift lift to Singapore's economy

### BY THE NUMBERS

The concerts by US pop star Taylor Swift and British rock band Coldplay are estimated to add about

**0.25** percentage point

to the Republic's gross domestic product in the first quarter.

Economic ripple effect on the economy from each Swift concertgoer's spending:

**\$1,385**

Total spending by **300,000** concertgoers:

**\$415.5m**



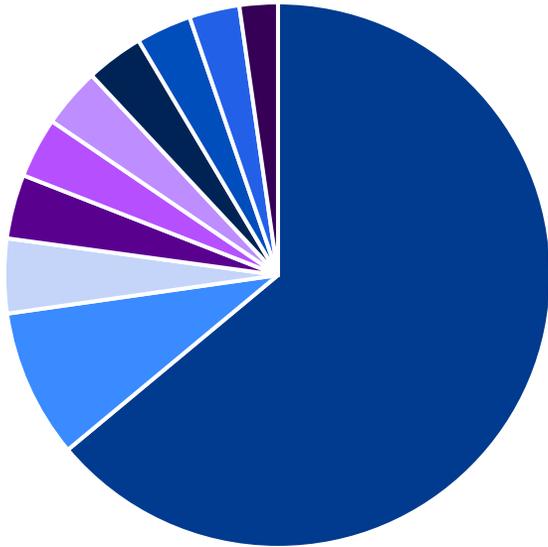


# What's happening locally?

# Scheduled Flight Capacity by Country | Thailand

## Total Seats for Next 13 Weeks

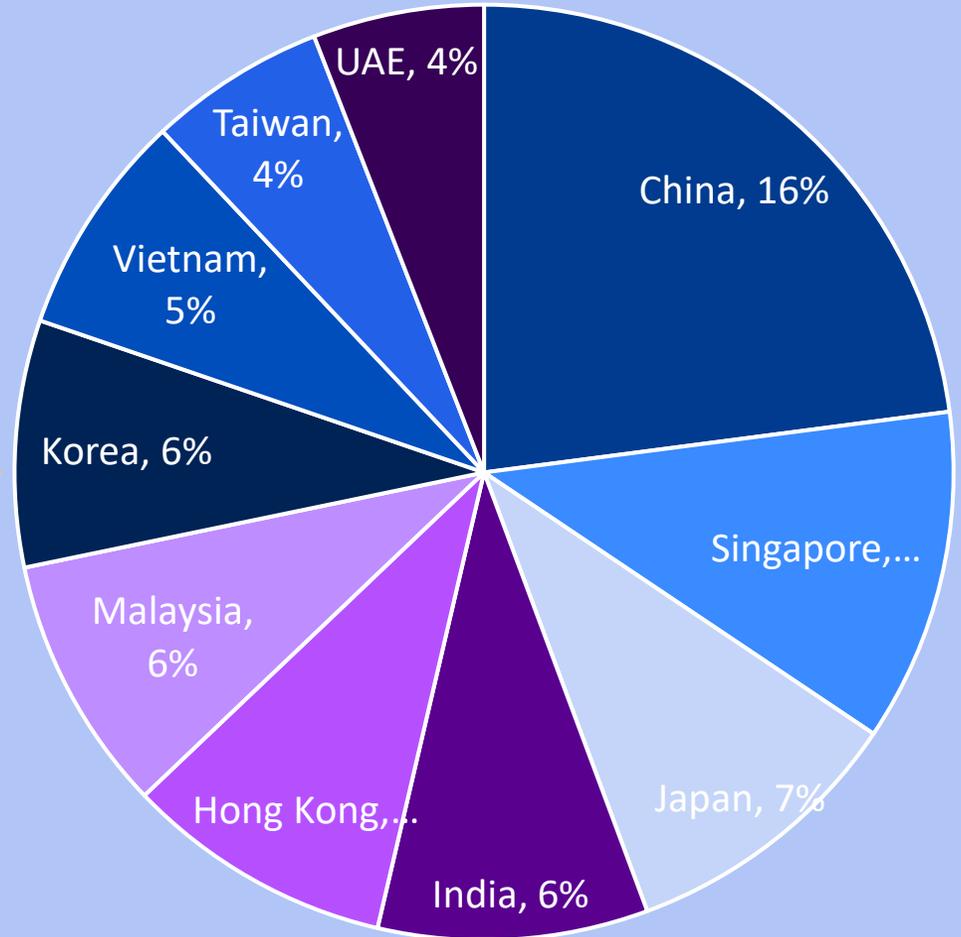
### Top 10 Origin Country



| Origin Country | Contribution |
|----------------|--------------|
| Thailand       | 53%          |
| China          | 7%           |
| Singapore      | 4%           |
| Japan          | 3%           |
| India          | 3%           |
| Hong Kong      | 3%           |
| Malaysia       | 3%           |
| Korea          | 3%           |
| Vietnam        | 2%           |
| UAE            | 2%           |

China & India back in top 10

### Top 10 Origin Country



# Online Accommodation Search Demands | Thailand

Last 12 weeks

## Demand by User Country (Top 15)

| User Country          | Demand Vol. | YoY  | PoP |
|-----------------------|-------------|------|-----|
| + [TH] Thailand       | 60.0M       | 6%   | 4%  |
| + [IN] India          | 4.00M       | 27%  | 10% |
| + [GB] United Kingdom | 4.00M       | 27%  | 26% |
| + [US] United States  | 4.00M       | 18%  | 13% |
| + [DE] Germany        | 3.00M       | 10%  | 19% |
| + [AU] Australia      | 3.00M       | 17%  | 18% |
| + [MY] Malaysia       | 2.00M       | 11%  | 1%  |
| + [FR] France         | 2.00M       | 31%  | 23% |
| + [SG] Singapore      | 2.00M       | -1%  | -5% |
| + [JP] Japan          | 2.00M       | 18%  | 9%  |
| + [TW] Taiwan         | 900K        | 20%  | -1% |
| + [HK] Hong Kong      | 800K        | -17% | 4%  |
| + [NL] Netherlands    | 800K        | 23%  | 20% |
| + [ID] Indonesia      | 700K        | 18%  | 10% |
| + [CH] Switzerland    | 700K        | 25%  | 21% |

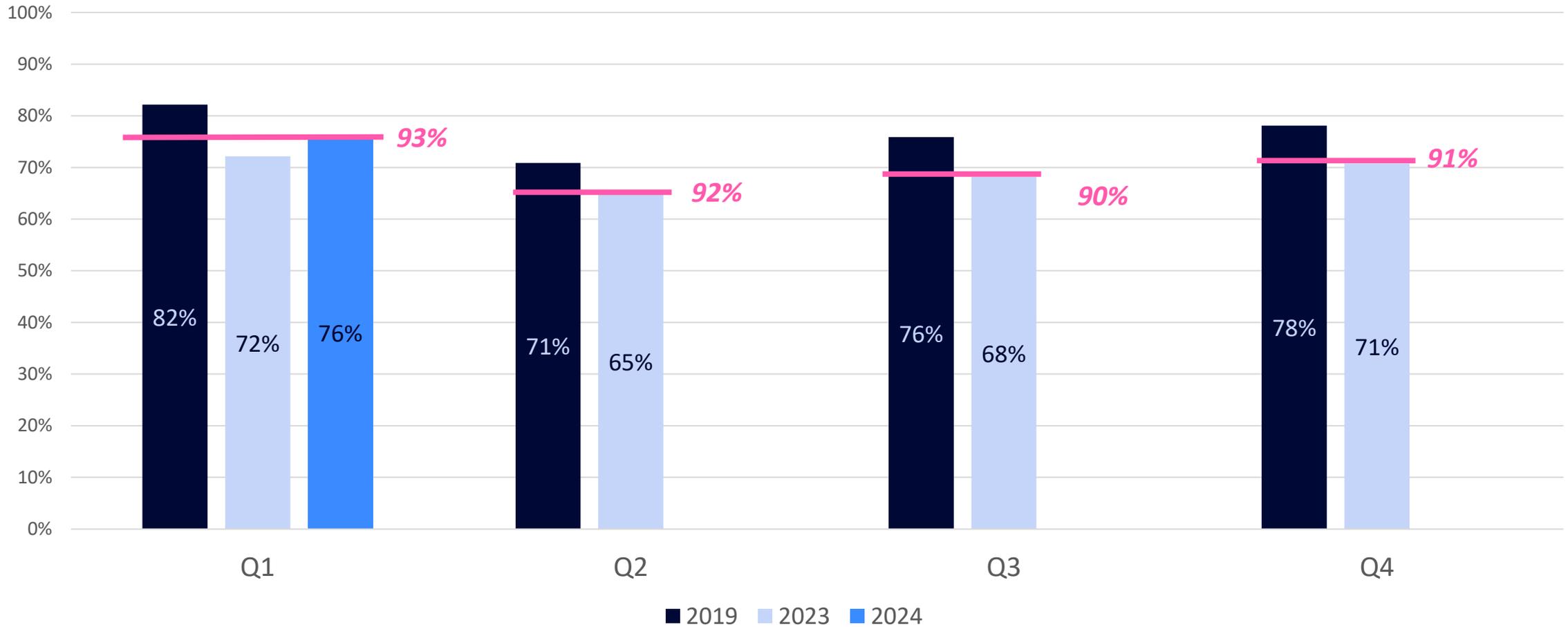
## Daily Trend

|                       |                        |                      |
|-----------------------|------------------------|----------------------|
| Accom. Demand         | International          | Domestic             |
| <b>100M</b>           | <b>40%</b>             | <b>60%</b>           |
| 7.6% PoP<br>10.9% YoY | 13.8% PoP<br>18.5% YoY | 3.9% PoP<br>6.4% YoY |



# Year-on-Year Occupancy | Thailand

On-the-books occupancy trending from 2019, 2023 & 2024

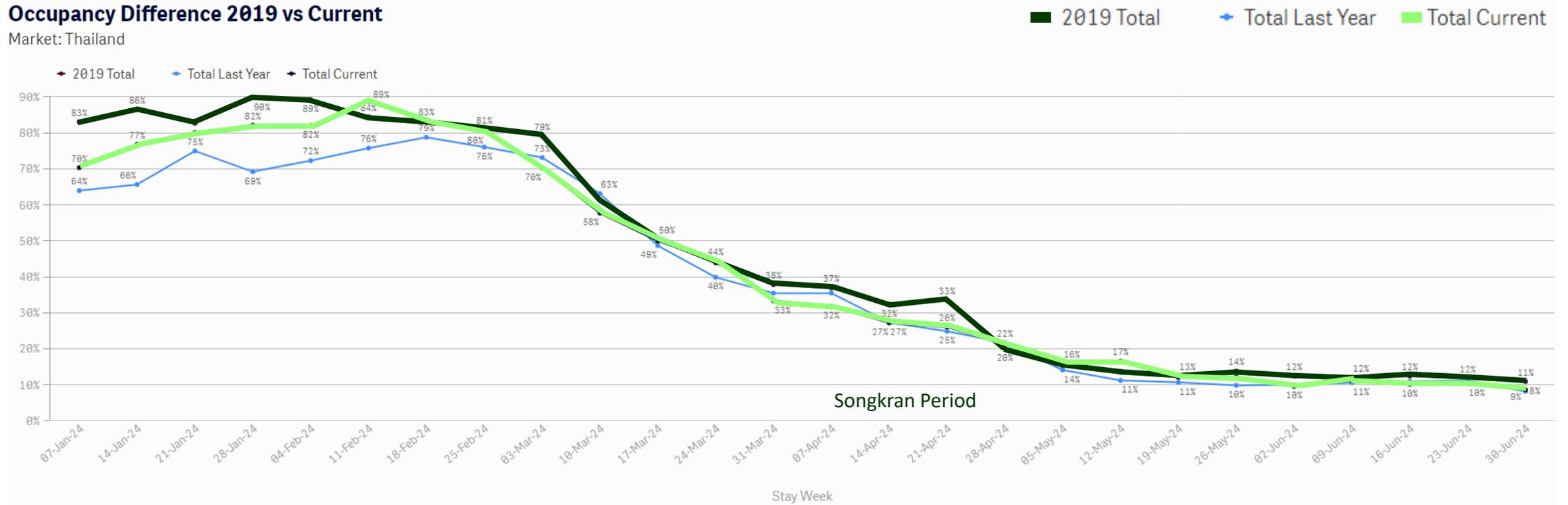


# H1 2024 Weekly OTB Occupancy | Thailand

On-the-books occupancy trending from 2019, 2023 & 2024

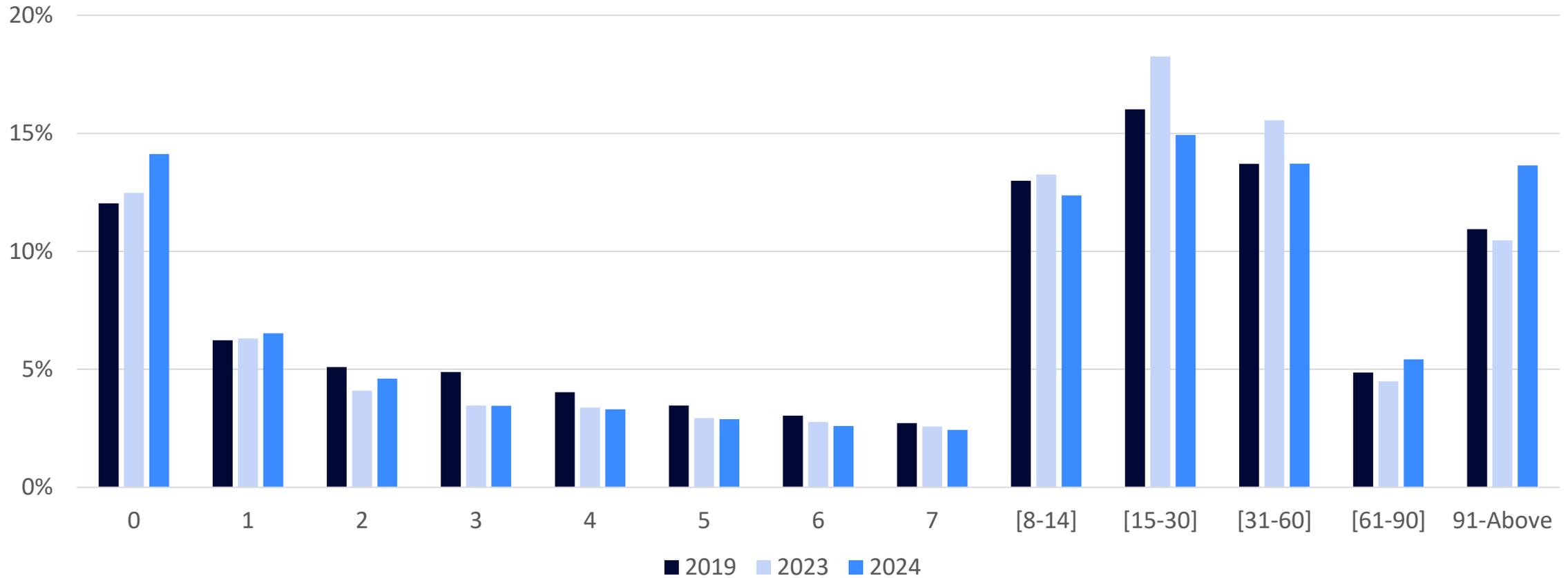
## Occupancy Difference 2019 vs Current

Market: Thailand



# Lead Time | Thailand

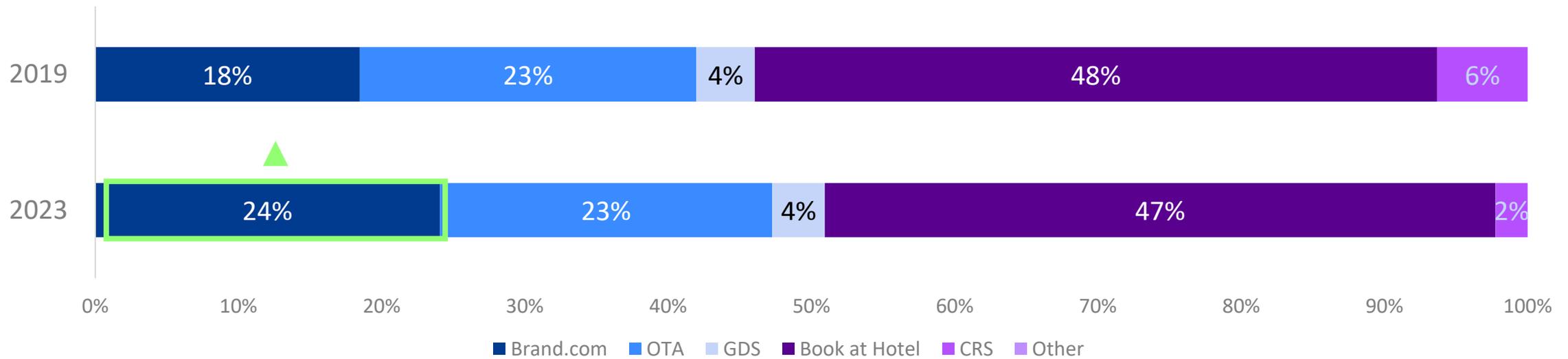
Data from Activity Week: 11 Feb – 10 Mar 2023



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# Year-on-Year Channel Mix | Thailand

## 2019 vs 2023

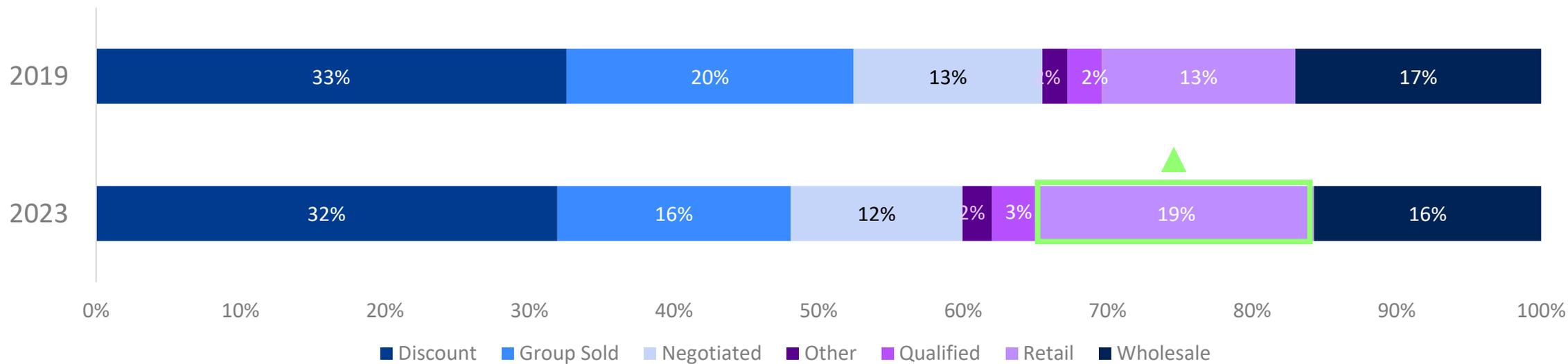


Brand.com  
2019 vs 2023

▲ 30%

# Year-on-Year Segmentation Mix | Thailand

## 2019 vs 2023



**Retail**  
2019 vs 2023  
▲ 42%

# Catalysts for Change

Hospitality market of 2024 is not that of 2019...

## Traveler expectations and preferences are evolving



# With these priorities in mind our TIPS FOR HOTELIERS



# TIPS FOR HOTELIERS

**Digital experiences**  
gained renewed prominence  
during the pandemic, with  
travelers now expecting them  
as standard



# TIPS FOR HOTELIERS

Effective use of **business intelligence insights** and **media campaigns** to build a comprehensive multi-channel distribution strategy is vital for demand generation

# TIPS FOR HOTELIERS

Technology is a must to help  
understaffed properties  
**automate daily operations**  
and manage critical event details  
with ease

# TIPS FOR HOTELIERS

## Sustainability Commitment

Committed to **preserving and regenerating** the environment and leaving a positive, enduring impact on our local community.



# Delivering better journeys for everyone, everywhere



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Visit [www.amadeus-hospitality.com](http://www.amadeus-hospitality.com)  
to learn more insights

Thank you



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