



# POWER-UP

EDUCATION & NETWORKING EVENT

**HONG KONG**

27 MAR 2025

meet share learn unwind



FOR COMMERCIAL HOTELIERS



**HYATT  
REGENCY™**  
HONG KONG  
TSIM SHA TSUI

**amadeus**



# HONG KONG MARKET PERFORMANCE & OUTLOOK



**EDWARD WRIGHT**  
Vice President - Asia  
Amadeus Family

## HONG KONG **POWER-UP**

EDUCATION & NETWORKING

For Commercial Hoteliers





# Travel Intelligence

Actionable insights. Unlocked potential.

“We believe that hospitality data has powerful stories to tell, and in order to ignite your business growth you need to know those stories in real-time.”



# Hotels have big plans to use business intelligence data for revenue growth in 2025.

Business intelligence is a key area of focus with hoteliers of all sizes. Many are seeking a competitive edge by leveraging analytics.

The highest value insights from BI are currently counted as:

37%

Historical hotel performance data (occupancy, RevPAR and ADR)

35%

Future trends

30%

Google search trends

29%

Competitive set insights on occupancy and rates

26%

Air searches by market



# Information is key.

**Maximize Revenue**

**Improve Marketing**

**Increase Occupancy**

**Optimize Performance**



We deliver the complete context for your strategies.



**3**

Seamless connectivity with all three major GDS



**41K**

Hotel data providers



**12**

Full months of forward-looking data



**350K**

Travel agencies worldwide available



**600+**

Data sources (Hotels, OTAs, Rentals, Metasearch)

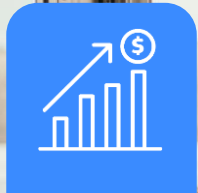


**10b**

Rates per month

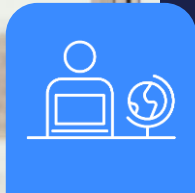


# Unlock the right Insights Your Business Potential



## Demand360<sup>®</sup>

Establish profitable demand strategies with greater visibility into the market, the competition, and how you stack up against them



## Agency360<sup>®</sup>

Expand agency booking insights beyond the GDS for a total market view to improve leisure and corporate sales prospecting



## RevenueStrategy360<sup>™</sup>

View all the forward-looking demand and rate data you need - in one place - to make the most informed revenue strategy decisions



## AmadeusNavigator360<sup>™</sup>

Seamlessly merge Air, hotel and sociodemographic data to uncover every step of the traveler's journey and develop powerful destination marketing strategies.



# Demand360+ Channel Mix

**Brand.com**

Reservations booked directly on a hotel's website.

**CRS**

Reservations booked via call center.

**Direct/ Book  
at Hotel**

Reservations booked directly with the property. Via email, voice call and etc.

**GDS**

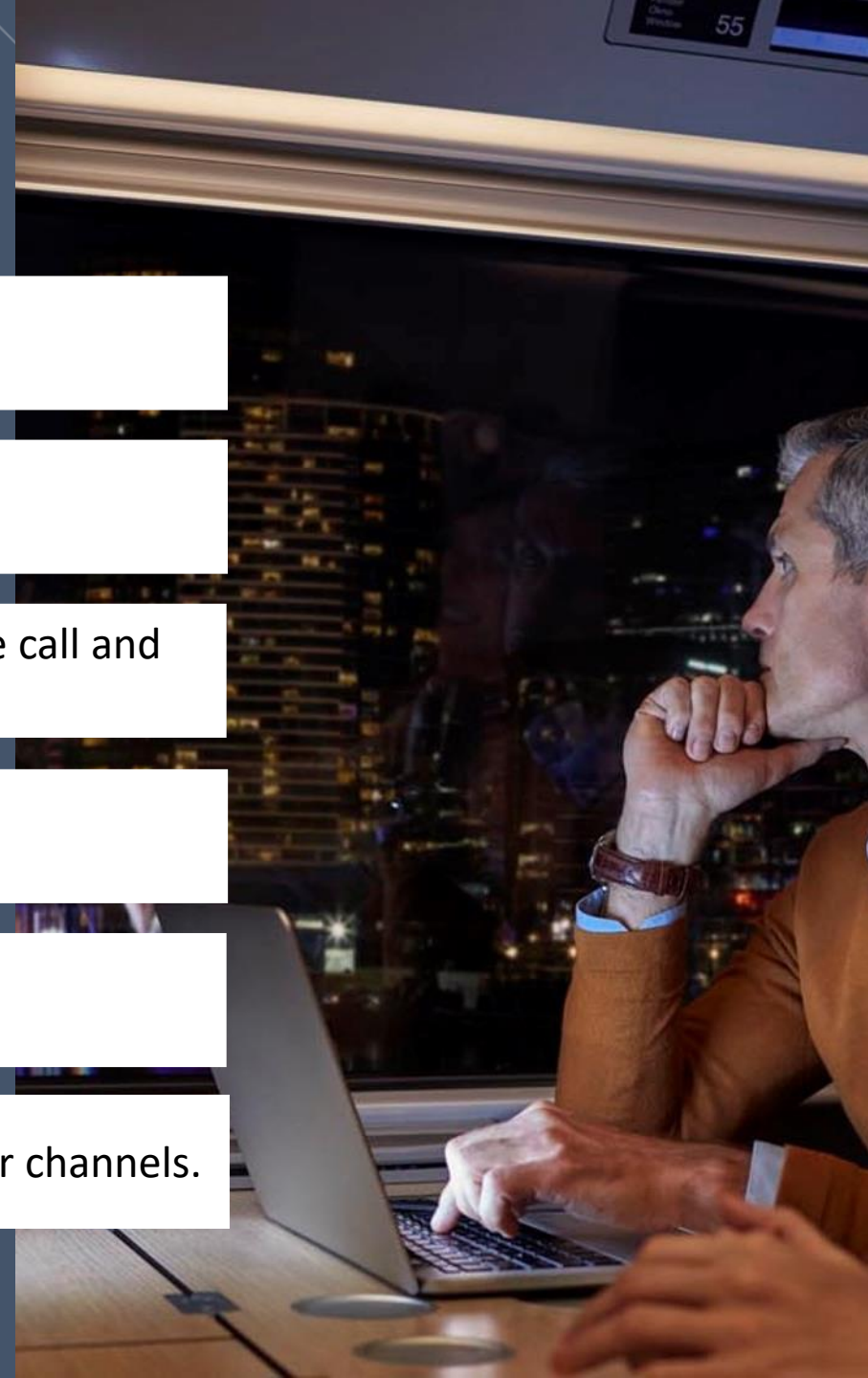
Global distribution system via Amadeus, Sabre and Travelport.

**OTA**

Online travel agencies.

**Other**

Reservations that could not be categorized into any of the other channels.



# Hotel Occupancy by Region | Worldwide

April 2025 vs. same time last year

**North America**

2025: 35.7%  
2024: 39.3%

**Europe**

2025: 42.5%  
2024: 44.9%

**Greater China**

2025: 16.2%  
2024: 16.4%



**Latin America**

2025: 28.2%  
2024: 30.1%

**Middle East/Africa**

2025: 36.8%  
2024: 31.3%

**Asia**

2025: 32.5%  
2024: 34.2%

**ANZ**

2025: 44.1%  
2024: 42.7%

## Highlights

- ANZ has the highest occupancy levels worldwide, followed by Europe.
- Only Middle East/Africa and ANZ are tracking ahead of last year.

# Top 10 Cities for Airline Outbound | Worldwide

Understand how most searched cities rank against the most booked cities into April 2025.

Searched cities	Vs.	Booked cities
1 Tokyo, Japan	↘	New York City, US
2 London, UK	↘	Seoul, Korea (ROK)
3 Bangkok, Thailand	↘	London, UK
4 New York City, US	↗	Tokyo, Japan
5 Paris, France	=	Paris, France
6 Seoul, Korea (ROK)	↗	Bangkok, Thailand
7 Dubai, UAE	↓	Los Angeles, USA
8 Istanbul, Turkey	↓	Delhi, India
9 Rome, Italy	↓	Washington, USA
10 Madrid, Spain	↓	Taipei, China

### LEGEND



Position dropped from searched to booked



Position improved from searched to booked



Same position in top 10 searched & booked



Not one of top 10 booked cities

### Highlights

- For April 2025, Tokyo is the most searched destination but only the 4th most booked.
- Madrid, Rome, Istanbul and Dubai are not among the top 10 most booked cities, while they are on top 10 searched.



Source: Amadeus Navigator360™ data as of 21 March, 2025



# Greater China



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# Top 10 Cities for Airline Inbound YoY | Greater China

Top international airline searches into China for April 2025 and last year.

Searched Year on Year

	2024		2025
1	Bangkok, Thailand	↘	Seoul, Korea (ROK)
2	Tokyo, Japan	↘	Bangkok, Thailand
3	Seoul, Korea (ROK)	↗	Tokyo, Japan
4	Hong Kong, Hong Kong	=	Hong Kong, Hong Kong
5	Singapore, Singapore	=	Singapore, Singapore
6	Taipei, Taiwan	=	Taipei, Taiwan
7	Kuala Lumpur, Malaysia	↘	Osaka, Japan
8	Osaka, Japan	↗	London, UK
9	Sydney, Australia	↘	Kuala Lumpur, Malaysia
10	London, UK	↗	Sydney, Australia

**LEGEND**

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

**Highlights**

- Bangkok, Tokyo and Seoul remain in top 3 places year-on-year for searches.
- Into April, all countries from 2024 are also present in the top 10 for 2025.



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Source: Amadeus Navigator360™ data as of 21 March, 2025



# Top 10 Cities for Airline Inbound | Greater China

Top airline searches vs. bookings for April 2025.

	Searched		Booked
1	Seoul, Korea (ROK)	=	Seoul, Korea (ROK)
2	Bangkok, Thailand	↘	Tokyo, Japan
3	Tokyo, Japan	=	Taipei, Taiwan
4	Hong Kong, Hong Kong	↘	Bangkok, Thailand
5	Singapore, Singapore	↘	Hong Kong, Hong Kong
6	Taipei, Taiwan	↗	Osaka, Japan
7	Osaka, Japan	↗	Moscow, Russia
8	London, UK	↓	Singapore, Singapore
9	Kuala Lumpur, Malaysia	=	Kuala Lumpur, Malaysia
10	Sydney, Australia	=	Sydney, Australia

**LEGEND**

↘  
Position dropped from searched to booked

↗  
Position improved from searched to booked

=  
Same position in top 10 searched & booked

↓  
Not one of top 10 booked cities

Highlights

- Most searches and bookings into China come from Seoul.
- London is not on the top 10 list of bookings.



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Source: Amadeus Navigator360™ data as of 21 March, 2025



# Rest of Asia Pacific



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# Top 10 Cities for Airline Inbound YoY | Rest of Asia Pacific

Top international airline searches into Asia for April 2025 and 2024.

Searched Year on Year

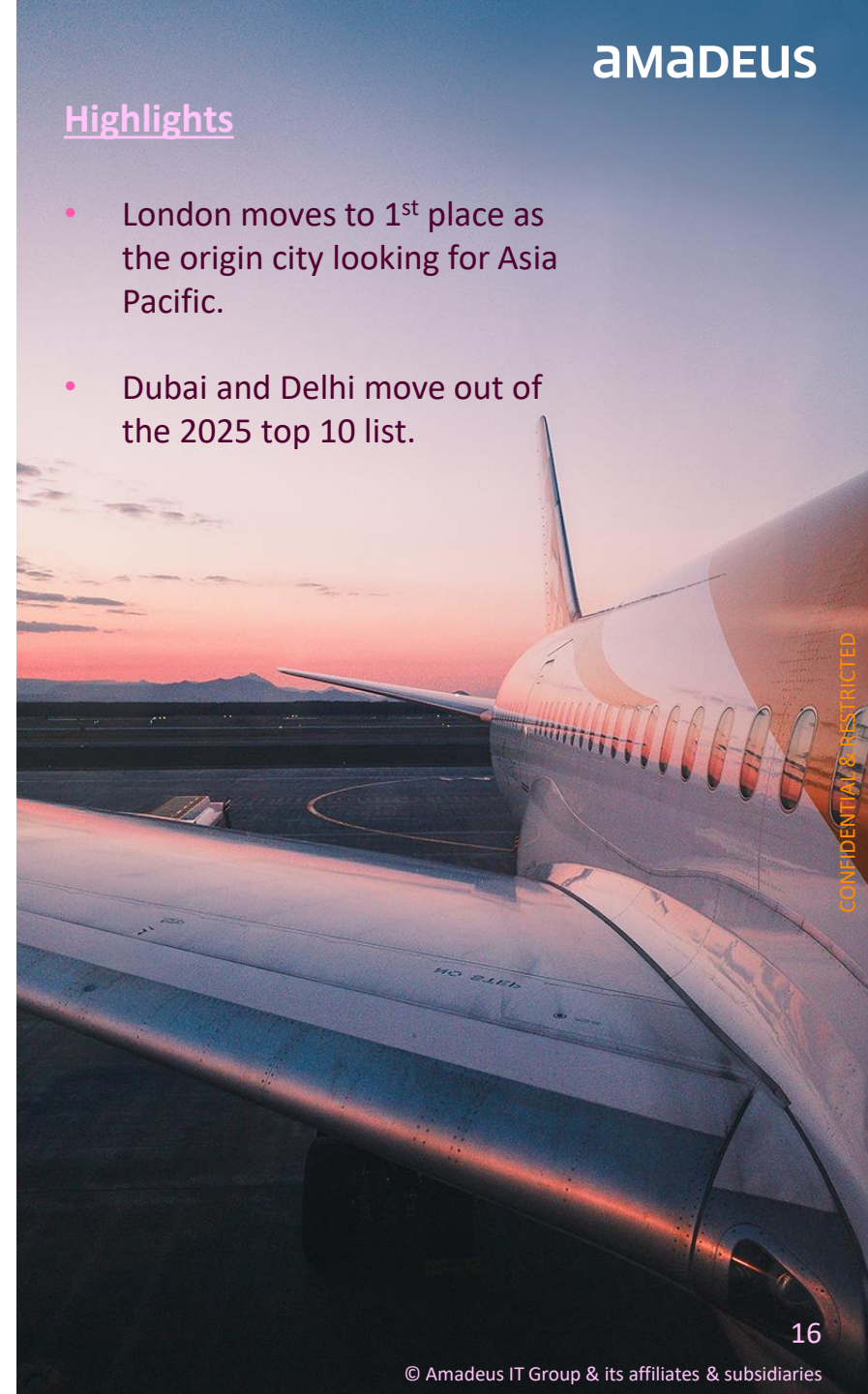
	2024		2025
1	Seoul, Korea (ROK)	↘	London, UK
2	Bangkok, Thailand	↘	Seoul, Korea (ROK)
3	London, UK	↗	Bangkok, Thailand
4	Tokyo, Japan	=	Tokyo, Japan
5	Taipei, Taiwan	↘	Hong Kong
6	Dubai, UAE	↓	Taipei, Taiwan
7	Hong Kong	↗	Singapore
8	Singapore	↗	Paris, France
9	Kuala Lumpur, Malaysia	=	Kuala Lumpur, Malaysia
10	Delhi, India	↓	Sydney, Australia

**LEGEND**

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

Highlights

- London moves to 1<sup>st</sup> place as the origin city looking for Asia Pacific.
- Dubai and Delhi move out of the 2025 top 10 list.



Source: Amadeus Navigator360™ data as of 21 March, 2025

# Top 10 Cities for Airline Inbound | Rest of Asia Pacific

## Highlights

- London is where most searches are coming from but it is in top 4 of bookings

Top airline searches vs. bookings for April 2025.

	Searched		Booked
1	London, UK	↘	Seoul, Korea (ROK)
2	Seoul, Korea (ROK)	↗	Bangkok, Thailand
3	Bangkok, Thailand	↗	Tokyo, Japan
4	Tokyo, Japan	↗	London, UK
5	Hong Kong	↘	Taipei, Taiwan
6	Taipei, Taiwan	↗	Hong Kong
7	Singapore	↓	Delhi, India
8	Paris, France	↓	Manila, Philippines
9	Kuala Lumpur, Malaysia	↓	Jeddah, Saudi Arabia
10	Sydney, Australia	↓	Osaka, Japan

### LEGEND

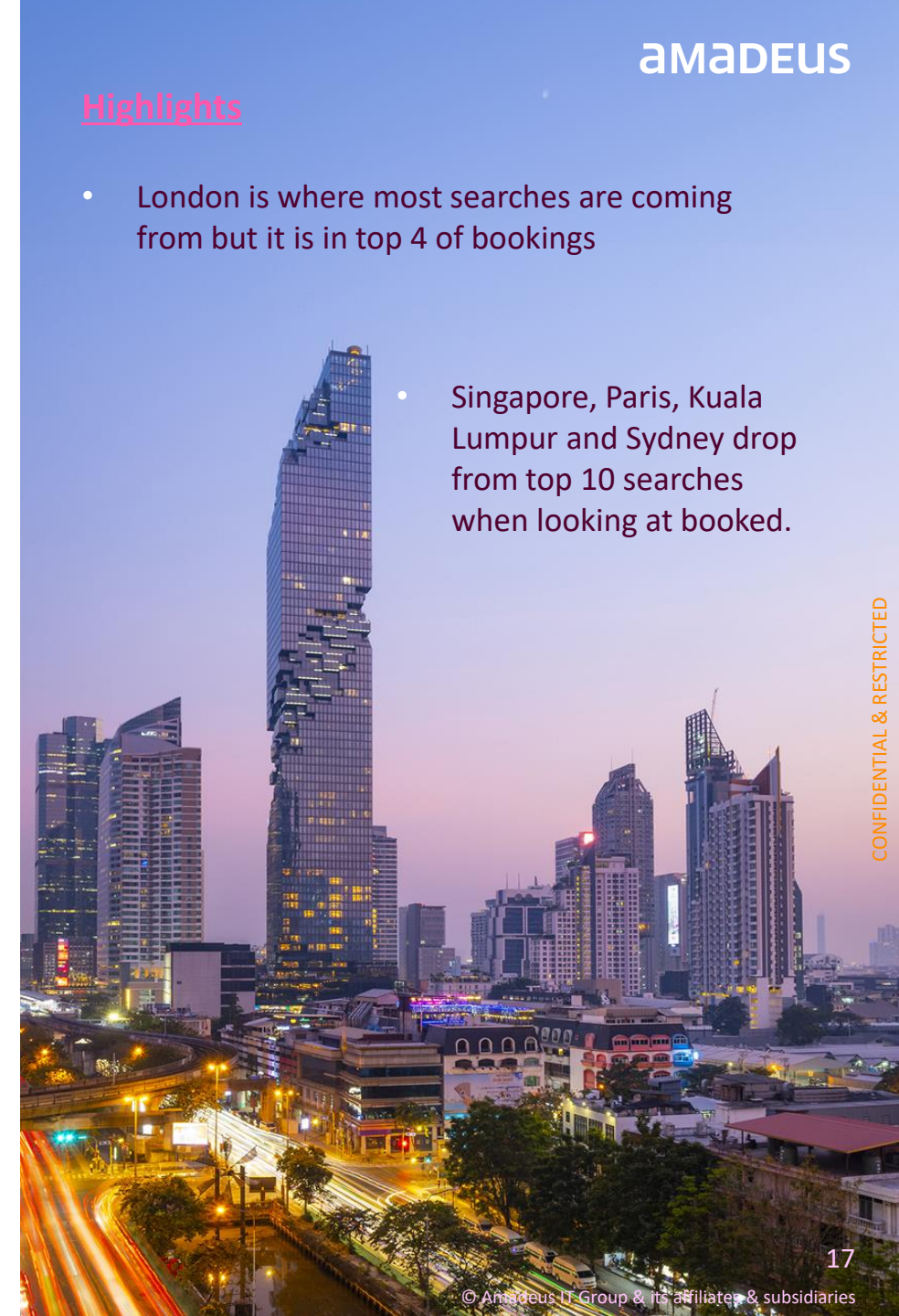
↘  
Position dropped from searched to booked

↗  
Position improved from searched to booked

=  
Same position in top 10 searched & booked

↓  
Not one of top 10 booked cities

- Singapore, Paris, Kuala Lumpur and Sydney drop from top 10 searches when looking at booked.



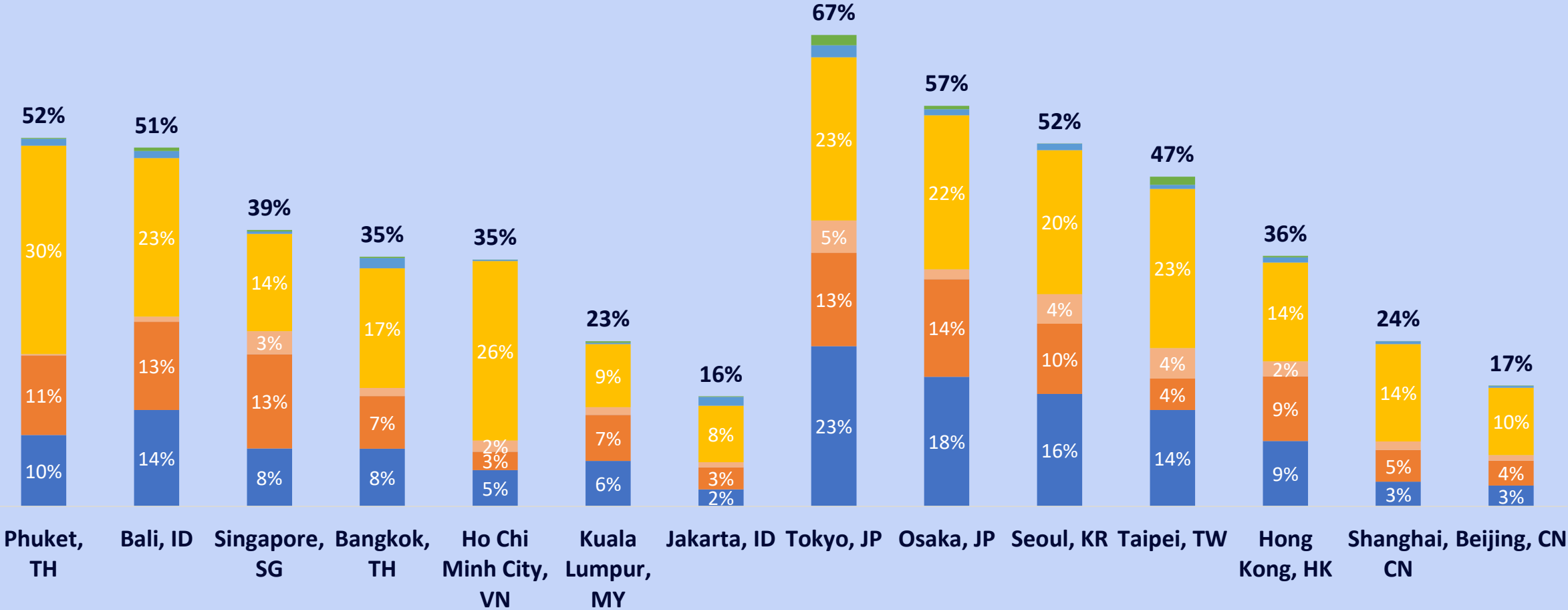
Source: Amadeus Navigator360™ data as of 21 March, 2025



# Hotel Occupancy by Channel | Major Markets in SE vs N Asia

April 2025

Brand    OTA    GDS    Direct    CRS    Other



Source: Amadeus Demand360+® data as Mar 20, 2025

# Hong Kong

Performance

## Q1 2025

OCC: 79.5% / ADR: \$230

RevPAR: \$181

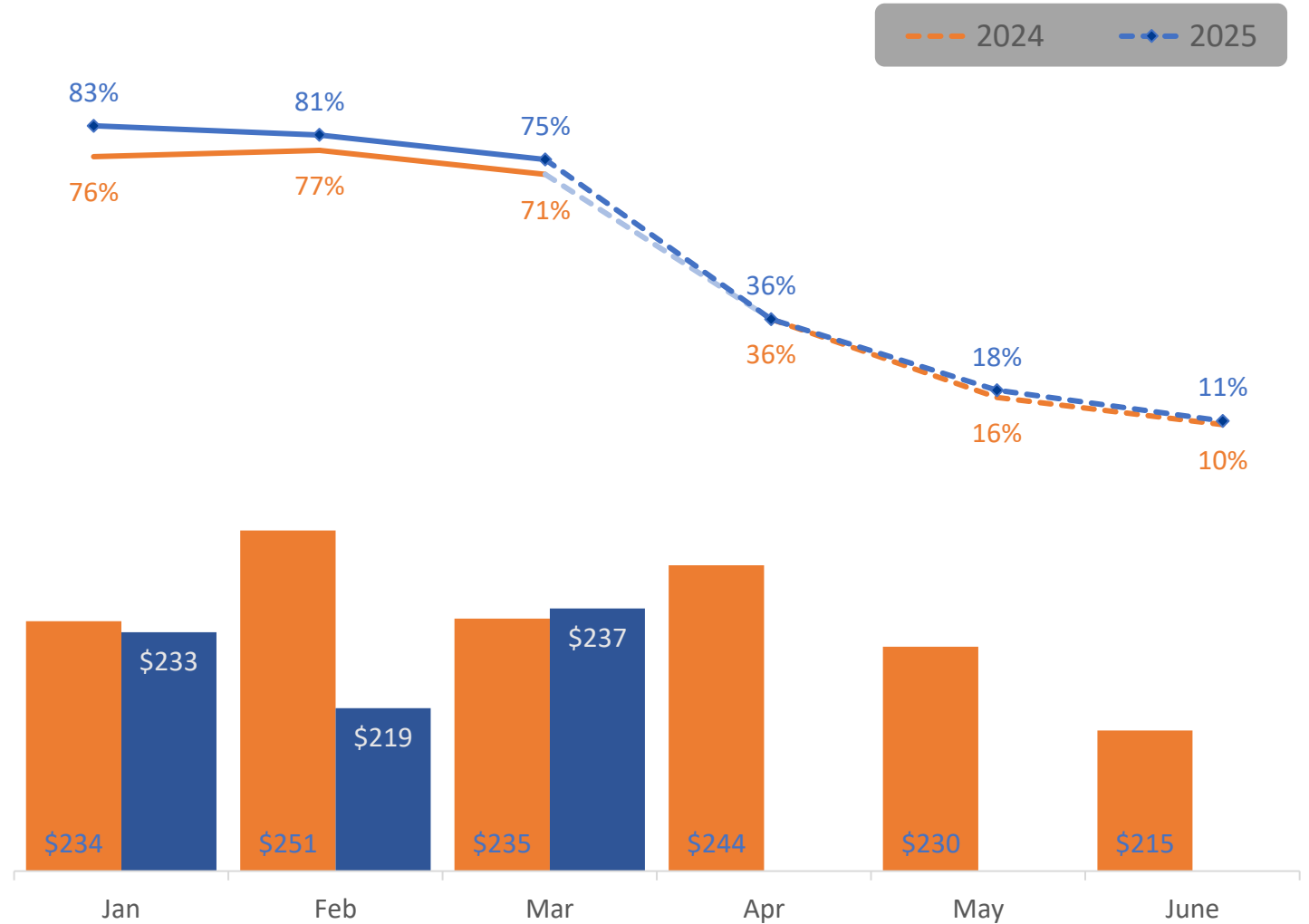
## Q1 2024

OCC: 74.5% / ADR: \$240

RevPAR: \$178

## Hotel Occupancy & ADR | Hong Kong

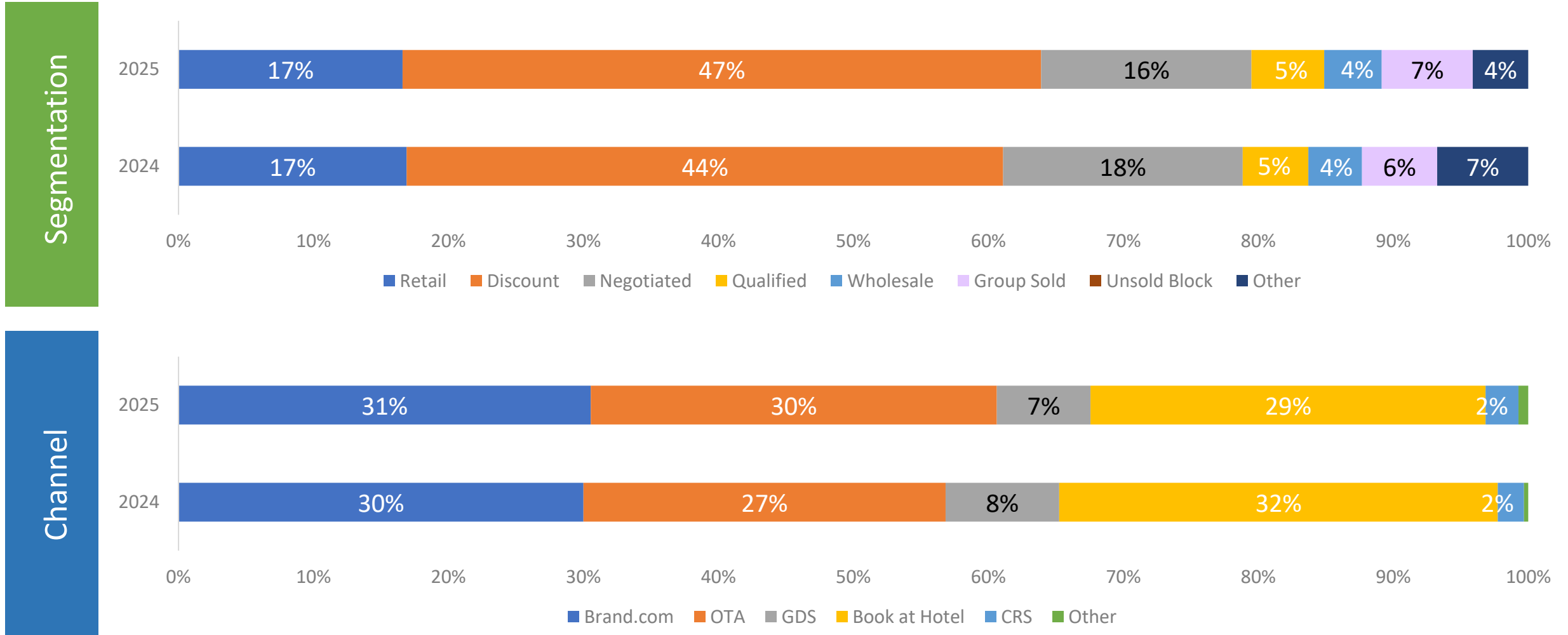
On-the-books by month compared to same time last year.



Source: Amadeus Demand360+® data as Mar 20, 2025

# Segmentation & Channel Mix | Hong Kong

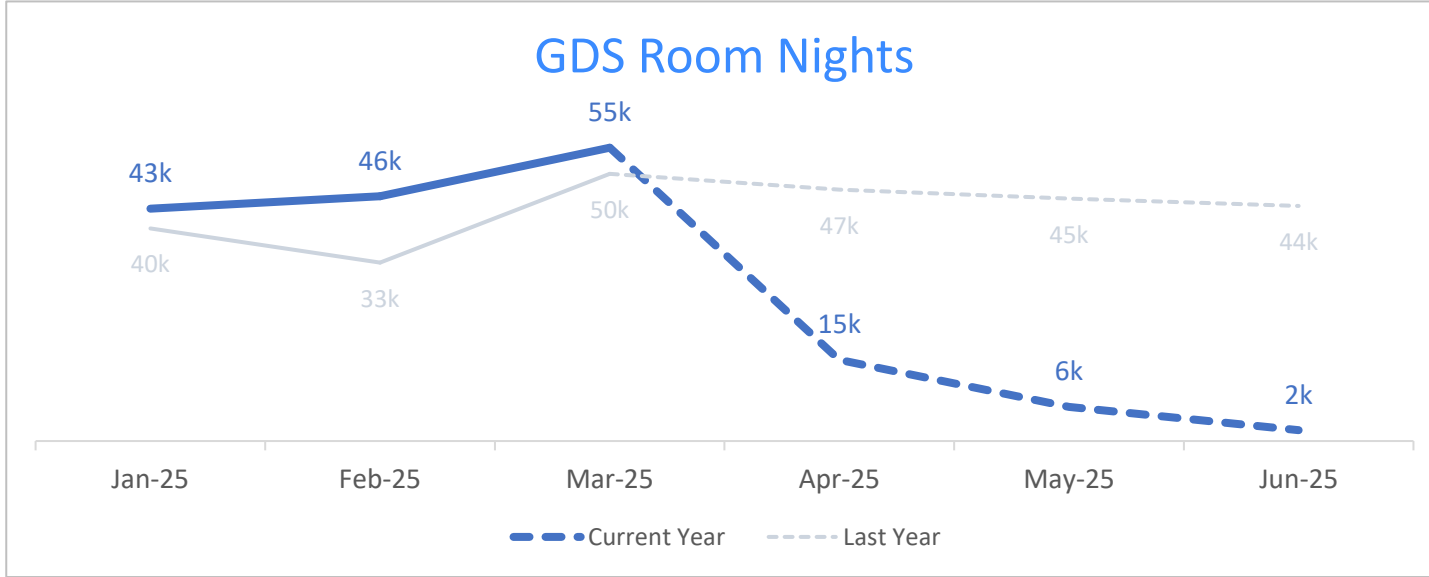
On-the-books market segmentation and distribution channel mix for April 2025 vs 2024.



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# 2025 GDS Performance | Hong Kong



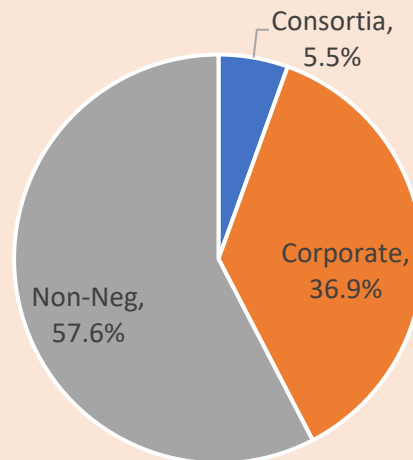
## Q1 2025 vs 2024

Room Nights **+17.1%**

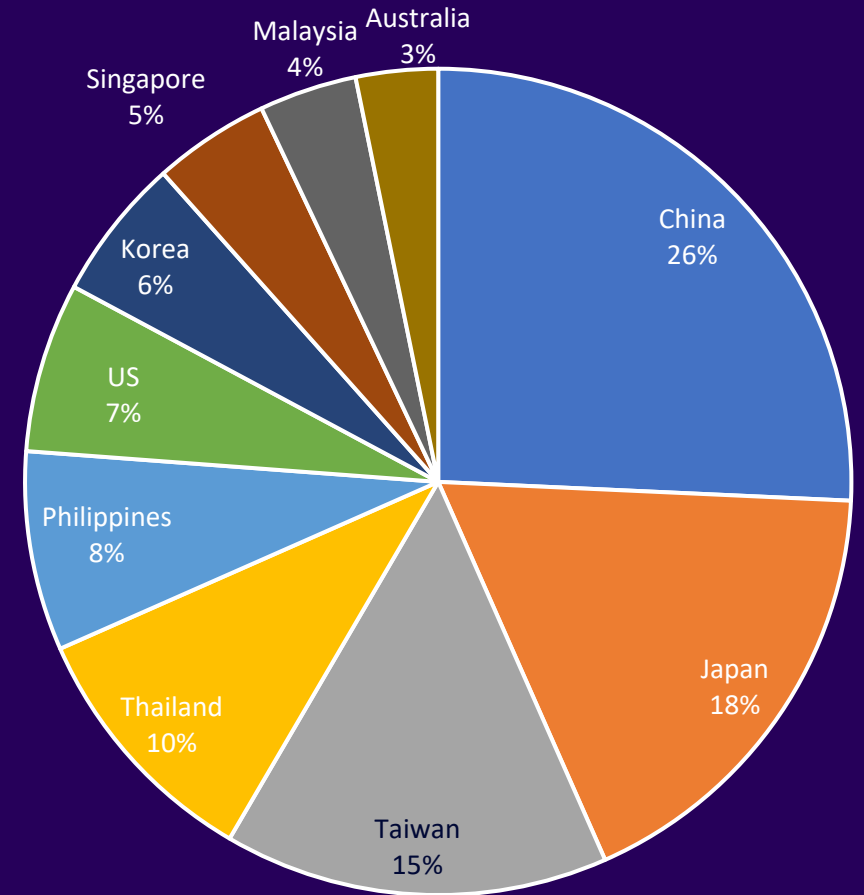
123k to 143.9k

ADR **-4.8%**

\$363 to \$345



# Q2 2025 Top 10 Origin for Air Passenger into HK



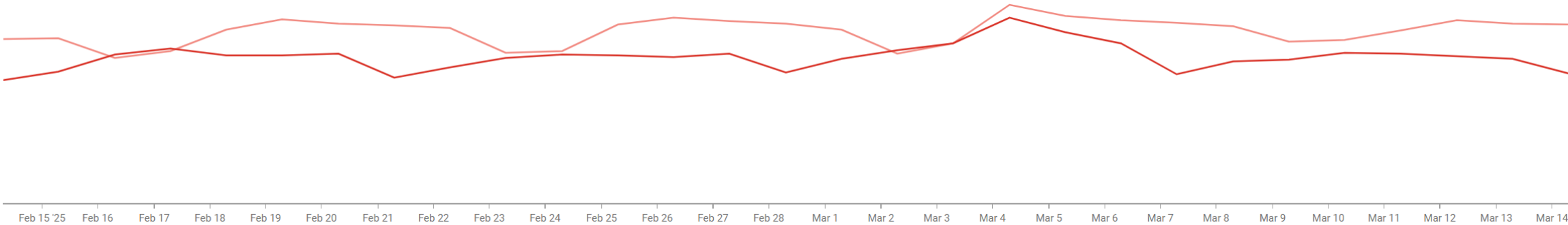
# Online Search Demand | Hong Kong

Last 12 weeks (14 Feb – 14 Mar 25)

Total queries  
**5M**  
↓ -14.97%

Domestic  
**33.37%**  
↑ 0.03%

International  
**66.63%**  
↓ -0.03%












— Indexed Queries Relative (Current) — Indexed Queries Relative (Previous)

Source: Google Destination Trends as Mar 19, 2025

# Online Search Demand | Hong Kong

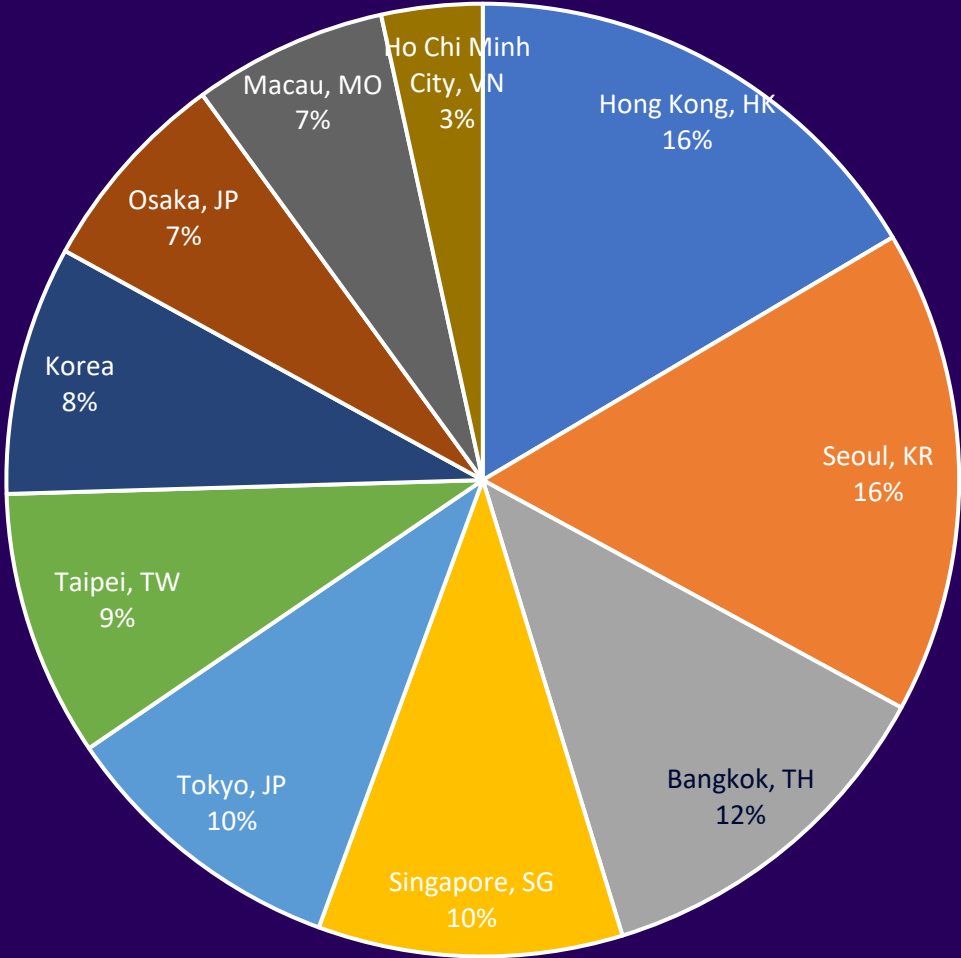
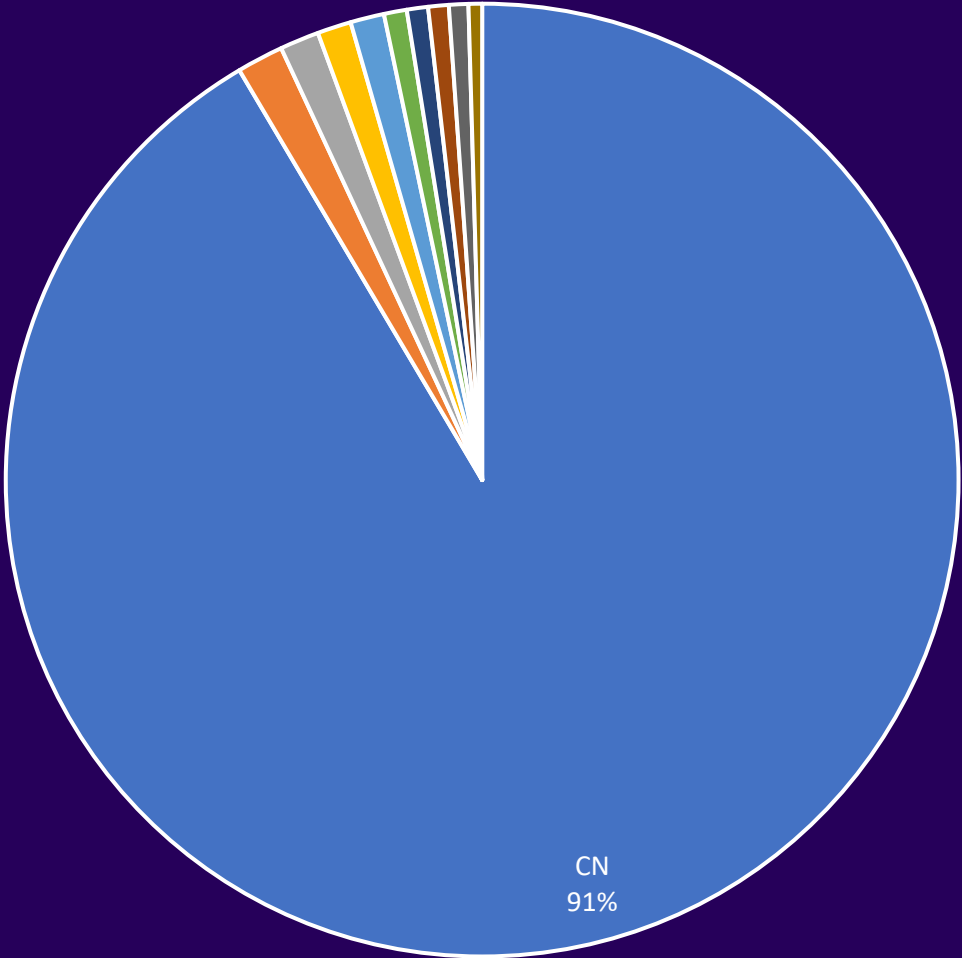
## Last 12 weeks (14 Feb – 14 Mar 25)

Destination Country	Queries	
	Current	PoP
 Hong Kong	2,000,000	↓ -14.89 %
 Japan	900,000	↓ -19.62 %
 China	500,000	↑ 2.11 %
 Taiwan	200,000	↓ -29.12 %
 Thailand	200,000	↓ -32.56 %
 Macao	200,000	↓ -27.48 %
 United States	100,000	↑ 7.25 %
 South Korea	100,000	↓ -16.66 %
 Singapore	80,000	↓ -20.42 %
 United Kingdom	80,000	↓ -23.64 %

Source: Google Destination Trends as Mar 19, 2025



# Q2 2025 Air Passenger Destination | Origin: China



Source: Amadeus Navigator360TM data as of Mar 20, 2025

# Key Takeaways



**Use accurate, forward-looking data** to manage your strategies



**Work with partners** who support breaking down the silos to ensure your success



**Challenge your teams** to find ways to embrace technology that supports you on your journey



# amadeus

Visit our website to learn more  
about **Hospitality Market Insights**.

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



Amadeus. It's how travel works.





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