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COMMERCIAL LEADERS FORUM

Revenue Beyond Rooms

hsmai

SEOUL 20 June 2025

여행자 환경 업데이트 및 2025 Y2D 성과 검토
Traveller Landscape Update and a Review of 2025 Y2D Performance

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COMMERCIAL LEADERS FORUM
커머셜 전략 컨퍼런스

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Amadeus Hospitality

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Amadeus Hospitality

SEOUL 20 June 2025

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The Power of Travel Intelligence

How data can enhance revenue opportunities across the travel ecosystem

Amadeus. It's how travel works better.

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

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Amadeus. It's how travel works better.

What can you do with detailed insights?
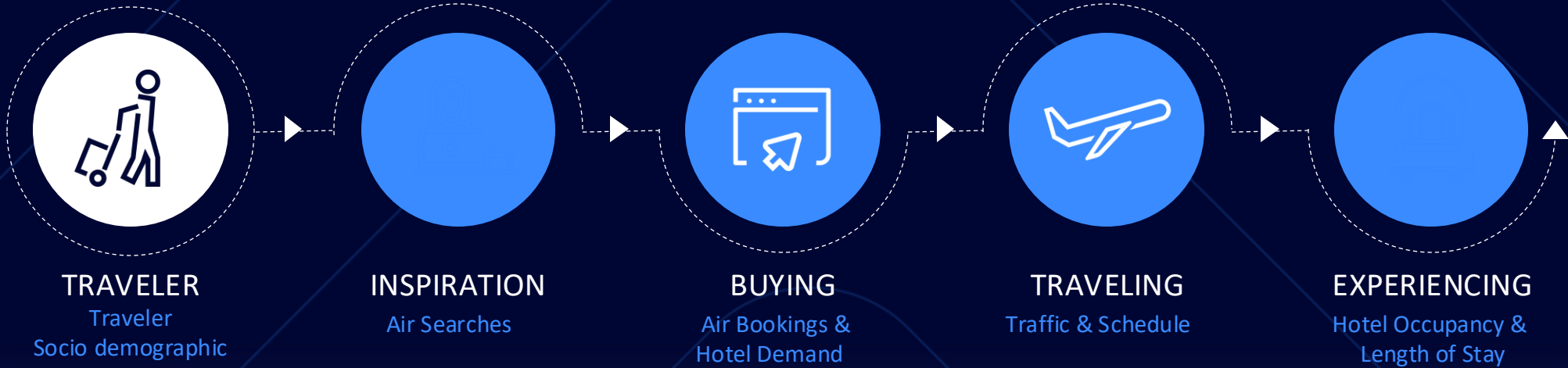## Information is key.

Maximize Revenue

Improve Marketing

Increase Occupancy

Optimize Performance

Amadeus offers the most comprehensive one-stop shop data across traveler's journey

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TRAVELER
Traveler
Socio demographic

INSPIRATION
Air Searches

BUYING
Air Bookings &
Hotel Demand

TRAVELING
Traffic & Schedule

EXPERIENCING
Hotel Occupancy &
Length of Stay

450m bookings Leverage unique Amadeus bookings database	**+200m pax** Searched daily for insight into worldwide travel demand	**100% bookings** Coming from **all three GDSs** (Amadeus, Sabre, Travelport).	**4500 airports** With active traffic	**+35m prop.** To see short-term rental trends
Trend data Age, Gender, Nationality	**20k OTAs & TA** Worldwide	**65k hotels** Worldwide to leverage demand and rate insights	**+900 airlines** to benefit from schedule data	**On-the-books data** That is constantly updated

* for searches, schedules, and bookings.

12 months of forward-looking data*

Multiple choice
54 votes

🗑 ⚙ Poll settings

현재 세계적으로 가장 많이 예약된 해외 여행지는 어느 도시입니까?

⊘ London 런던

2%

⊘ Tokyo 도쿄

28%

⊘ Seoul 서울

9%

✅ New York 뉴욕

20%

⊘ Paris 파리

13%

⊘ Bangkok 방콕

28%

Top 10 Cities for Airline Outbound | Worldwide

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

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

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

Source: Amadeus Navigator360 ™ data as of 19 May, 2025

Highlights

- For June 2025, London is the most searched destination but only the 3rd most booked.

- Madrid, Rome, Istanbul, Barcelona and Bangkok are not among the top 10 most booked cities, while they are among the top 10 searched.

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8

Multiple choice ⌄
4 votes

🗑 ⚙ Poll settings

아시아 태평양 지역에서 가장 많이 예약된 도시는 어디입니까?

- ⊘ London 런던 🗑

  ░░░░░░░░░░░░░░░░░░░░░░░░░░░░ 0%

- ⊘ Tokyo 도쿄

  ░░░░░░░░░░░░░░░░░░░░░░░░░░░░ 0%

- ✅ Seoul 서울

  ████████████████████████████ 100%

- ⊘ Delhi 델리

  ░░░░░░░░░░░░░░░░░░░░░░░░░░░░ 0%

- ⊘ Sydney 시드니

  ░░░░░░░░░░░░░░░░░░░░░░░░░░░░ 0%

- ⊘ Singapore 싱가포르

  ░░░░░░░░░░░░░░░░░░░░░░░░░░░░ 0%

Top 10 Cities for Airline Inbound | Rest of Asia Pacific

Top airline searches vs. bookings for June 2025.

	Searched		Booked
1	Seoul, Korea (ROK)	=	Seoul, Korea (ROK)
2	London, UK	↘	Tokyo, Japan
3	Tokyo, Japan	↗	Taipei
4	Singapore	↘	London, UK
5	Taipei	↗	Bangkok, Thailand
6	Bangkok, Thailand	↗	Delhi, India
7	Kuala Lumpur, Malaysia	↓	Sydney, Australia
8	Hong Kong	↘	Singapore
9	Dubai, UAE	↓	Osaka, Japan
10	New York, USA	↓	Hong Kong

Source: Amadeus Navigator360 ™ data as of 19 May, 2025

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

- Seoul is the top searching and booking city for destinations in Asia and the Pacific.

- Kuala Lumpur, New York and Dubai drop from top 10 searches when looking at booked.
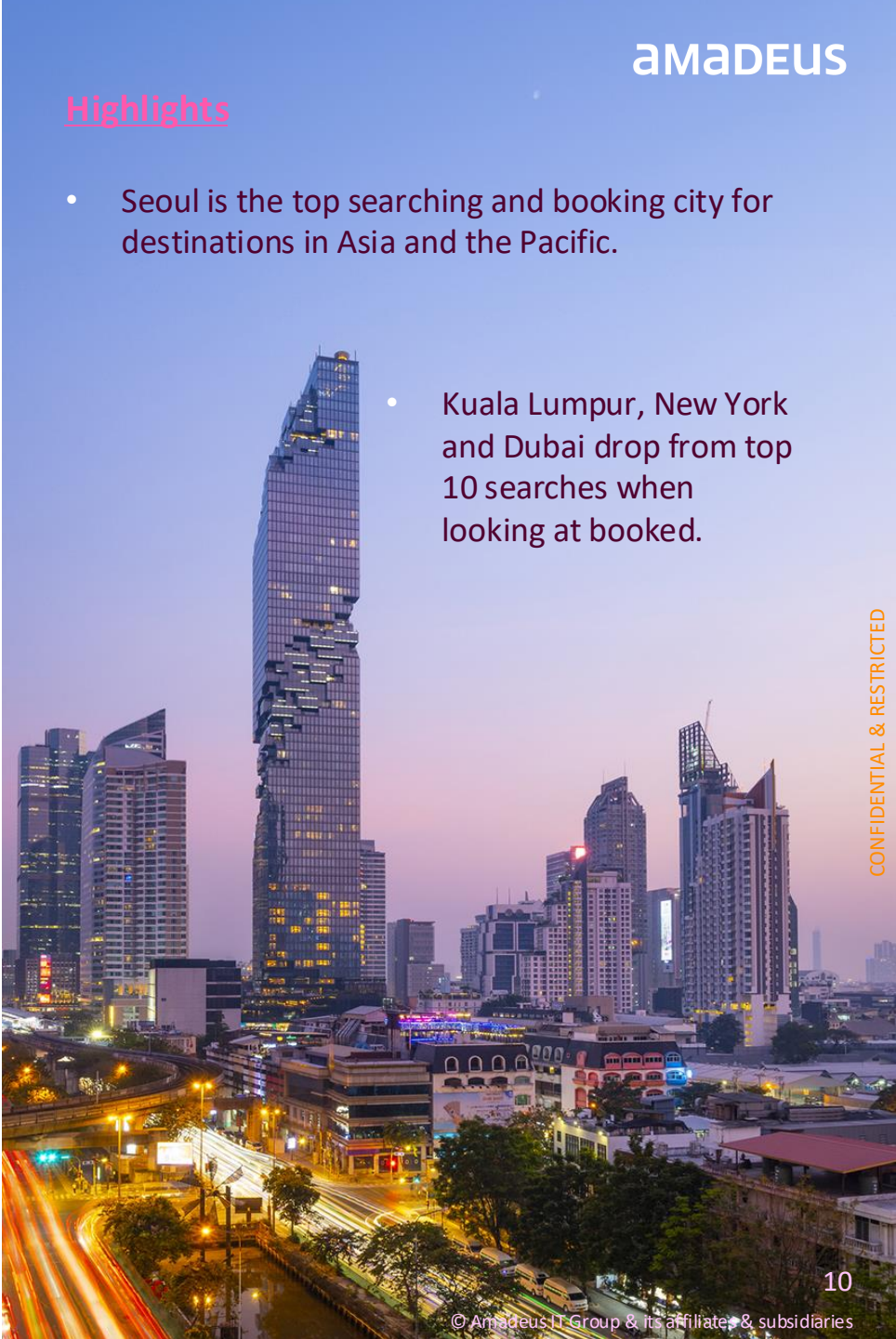
Top 10 Cities for Airline Inbound | Greater China

Top airline searches vs. bookings for June 2025.

	Searched		Booked
1	Seoul, Korea (ROK)	=	Seoul, Korea (ROK)
2	Tokyo, Japan	↘	Bangkok, Thailand
3	Singapore, Singapore	↘	Osaka, Japan
4	Bangkok, Thailand	↗	Hong Kong, Hong Kong
5	Osaka, Japan	↗	Singapore, Singapore
6	Hong Kong, Hong Kong	↗	Tokyo, Japan
7	Kuala Lumpur, Malaysia	=	Kuala Lumpur, Malaysia
8	Taipei	=	Taipei
9	New York, USA	↓	Hanoi, Vietnam
10	London, UK	↓	Ho Chi Ming, Vietnam

Source: Amadeus Navigator360 ™ data as of 19 May, 2025

LEGEND

↘
Position dropped from searched to booked

↗
Position improved from searched to booked

=
Same position in top 10 searched & booked
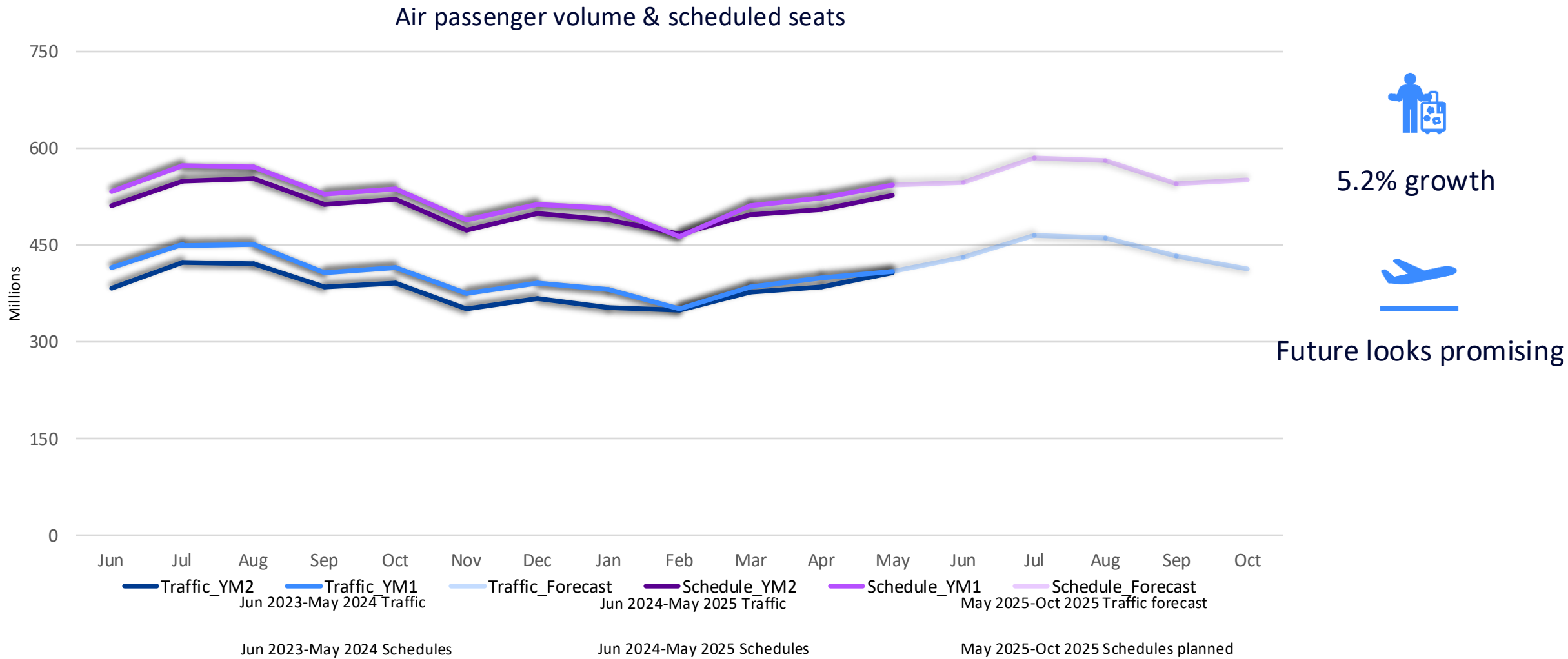
↓
Not one of top 10 booked cities

Highlights

- Seoul is the top searching and booking into China.

- London and New York are the only regions in the top 10 searches that are on the top 10 booking cities.

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11

Worldwide Passenger & Capacity trend

Air passenger volume & scheduled seats

5.2% growth

Future looks promising

Millions

Legend:
- Traffic_YM2 — Jun 2023-May 2024 Traffic
- Traffic_YM1 — Jun 2024-May 2025 Traffic
- Traffic_Forecast — May 2025-Oct 2025 Traffic forecast
- Schedule_YM2 — Jun 2023-May 2024 Schedules
- Schedule_YM1 — Jun 2024-May 2025 Schedules
- Schedule_Forecast — May 2025-Oct 2025 Schedules planned

Source: Navigator360™ as of Sunday, 8 June 2025

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Worldwide to Seoul: Passenger traffic and Capacity analysis

Air passenger volume & scheduled seats

5.8% growth

Traffic_YM2	Traffic_YM1	Traffic_Forecast	Schedule_YM2	Schedule_YM1	Schedule_Forecast
Jun 2023-May 2024 Traffic		Jun 2024-May 2025 Traffic		May 2025-Oct 2025 Traffic forecast
Jun 2023-May 2024 Schedules		Jun 2024-May 2025 Schedules		May 2025-Oct 2025 Schedules planned

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Source: Navigator360™ as of Sunday, 8 June 2025
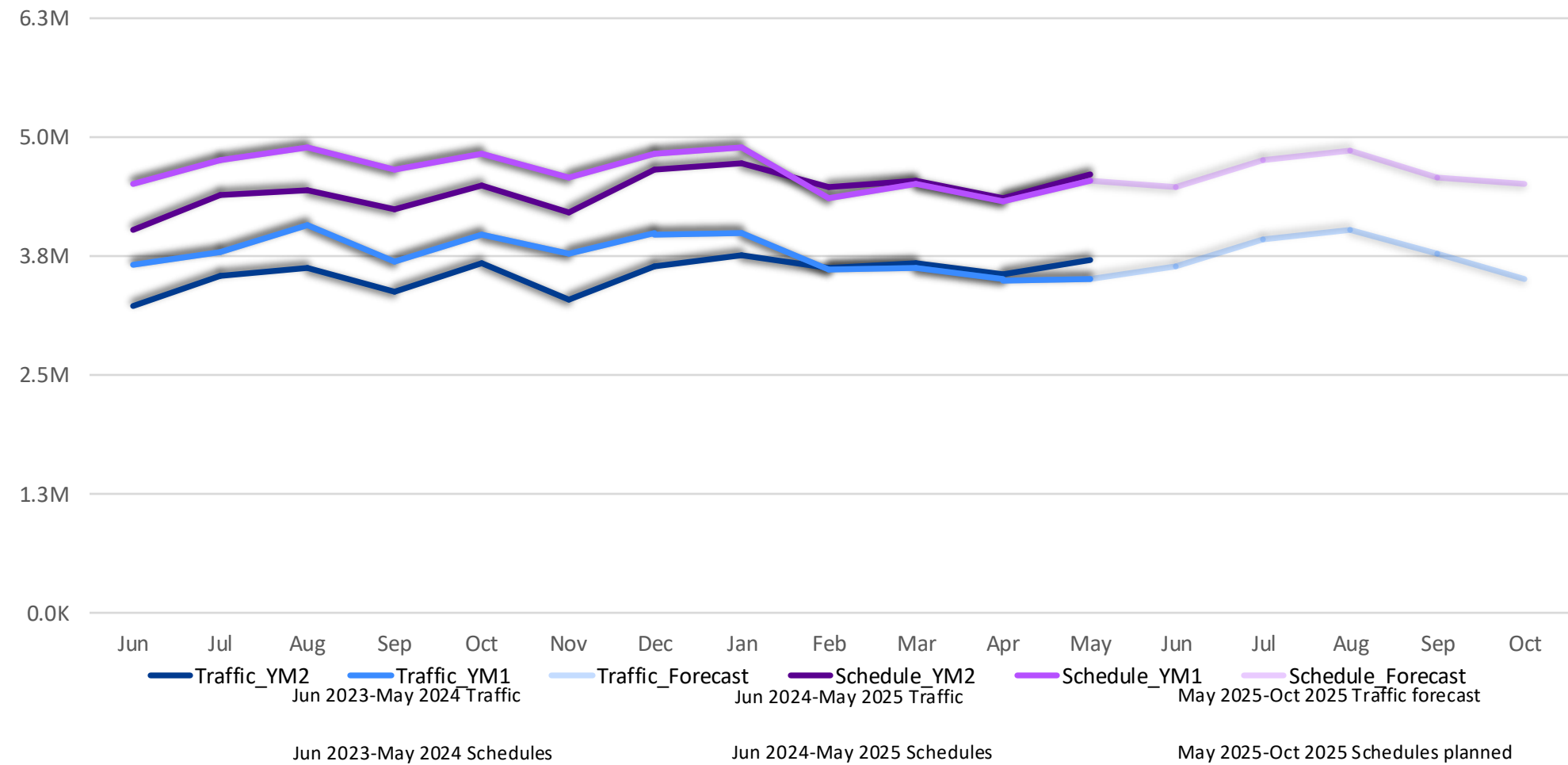
Where do Seoul's visitors come from? Reality vs. aspirations

Top 10 departure markets searching to Seoul

Origin market	Jun.23-May.24 ranking	Jun.24-May.25 ranking
Japan	1	1
China	3	2
United Sta.	2	3
Taiwan	4	4
Thailand	6	5
Vietnam	7	6
South Korea	5	7
Canada	8	8
Hong Kong	9	9
Philippines	11	10

Top 10 departure markets sending passengers to Seoul

Origin market	Jun.23-May.24 ranking	Jun.24-May.25 ranking	Jun.24-May.25 vs Jun.23-May.24
Japan	1	1	14%
China	3	2	47%
South Korea	2	3	-12%
United Sta.	4	4	4%
Taiwan	5	5	23%
Vietnam	6	6	-6%
Hong Kong	8	7	36%
Thailand	7	8	-13%
Indonesia	10	9	3%
Philippines	9	10	-2%
Total	**76.2%**	**78.0%**	

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Source: Navigator360™ as of Sunday, 8 June 2025

14

Hotel Occupancy by Region | Worldwide

YTD May 2025 vs. Same Time Last Year

● North America
2025:   66.1%
2024:   66.4%

● Europe
2025:   65.1%
2024:   64.5%

● Greater China
2025:   56.7%
2024:   56.6%

● Latin America
2025:   58.8%
2024:   59.7%

● Middle East & Africa
2025:   68.0%
2024:   65.1%

● Asia
2025:   64.9%
2024:   64.7%

● ANZ
2025:   73.7%
2024:   71.4%

Highlights

- Global Occupancy for YTD May 2025 is 64.6%, compared to 64.4% Same Time Last Year.

- ANZ has the highest occupancy levels worldwide.

- Most regions are trending ahead year over year.

Source: Amadeus Demand360+® data as Jun 04, 2025

Asia
Performance

January - September 2025
OCC: 44.7% / ADR: $174
RevPAR: $73

January - September 2024
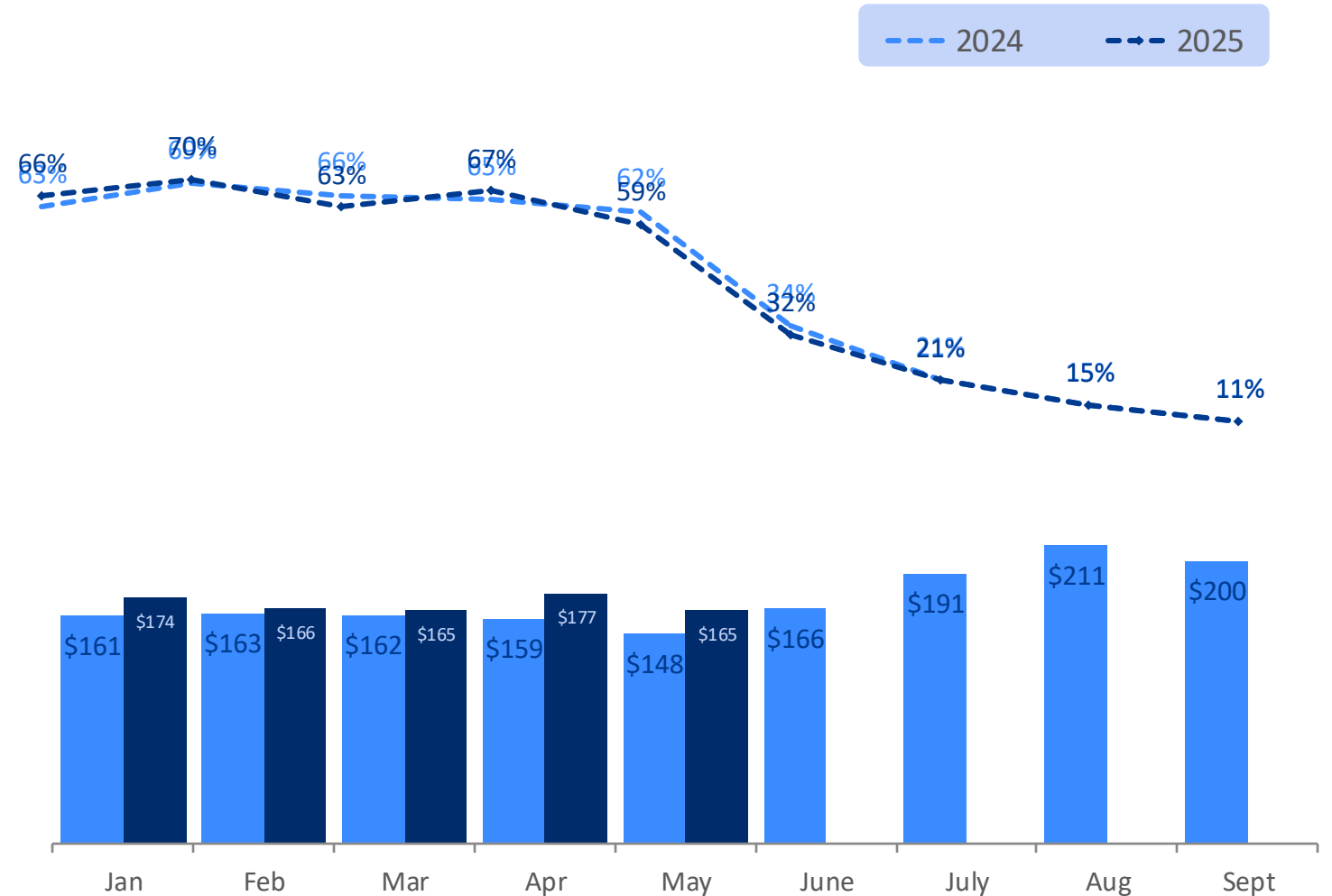OCC: 44.8% / ADR: $163
RevPAR: $69

2025 Hotel Occupancy & ADR | Asia

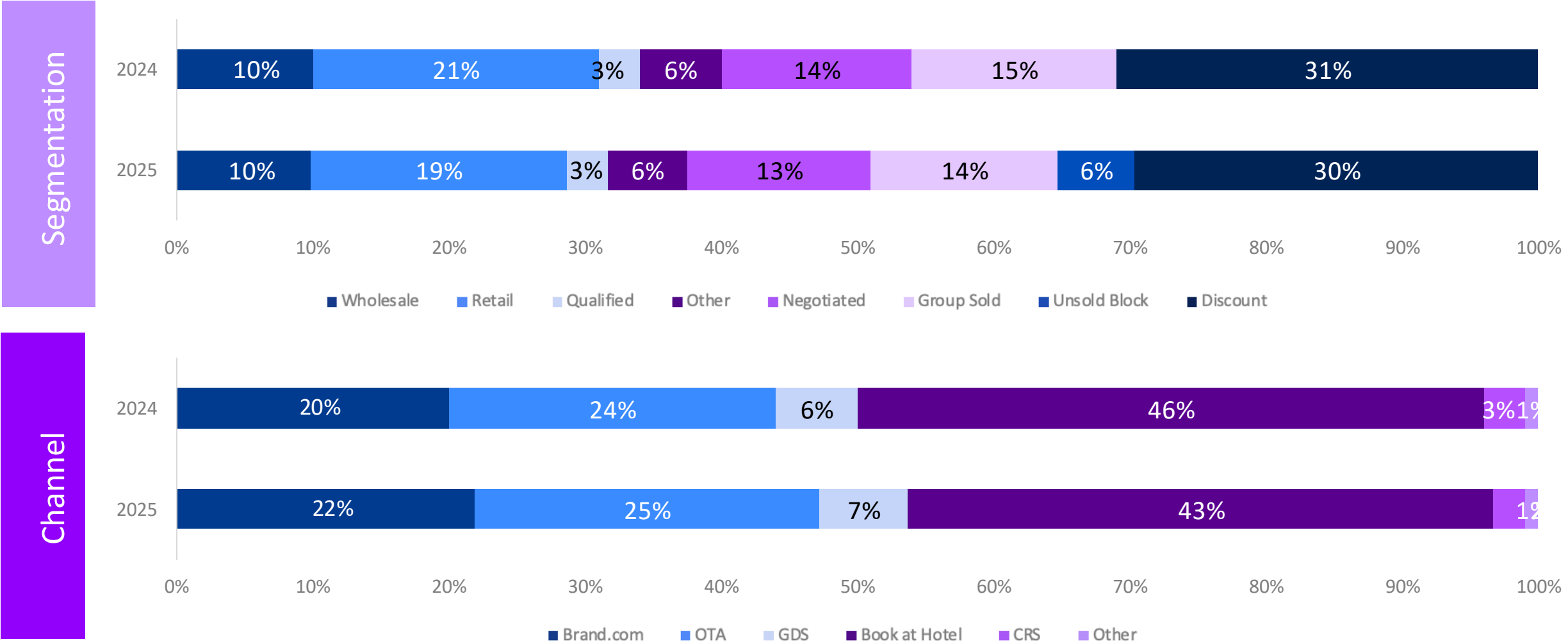## On-the-books by month compared to same time last year.

--- 2024   --- 2025

Occupancy (line chart):
- Jan: 63% / 66%
- Feb: 70% / 70%
- Mar: 66% / 63%
- Apr: 67% / 63%
- May: 62% / 59%
- June: 34% / 32%
- July: 21%
- Aug: 15%
- Sept: 11%

ADR (bar chart):
Month	2024	2025
Jan	$161	$174
Feb	$163	$166
Mar	$162	$165
Apr	$159	$177
May	$148	$165
June	$166	
July	$191	
Aug	$211	
Sept	$200	

Source: Amadeus Demand360+® data as Jun 04, 2025 (USD)

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Hotel Segmentation & Channel Mix | Asia

Room Nights Mix for Jan – Sept 2025

Segmentation

Year	Wholesale	Retail	Qualified	Other	Negotiated	Group Sold	Unsold Block	Discount
2024	10%	21%	3%	6%	14%	15%		31%
2025	10%	19%	3%	6%	13%	14%	6%	30%

Legend: ■ Wholesale ■ Retail ■ Qualified ■ Other ■ Negotiated ■ Group Sold ■ Unsold Block ■ Discount

Channel

Year	Brand.com	OTA	GDS	Book at Hotel	CRS	Other
2024	20%	24%	6%	46%	3%	1%
2025	22%	25%	7%	43%	1%	

Legend: ■ Brand.com ■ OTA ■ GDS ■ Book at Hotel ■ CRS ■ Other

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2025 GDS Performance | Asia

GDS Room Nights

- Current Year: Jan-25 598k, Feb-25 757k, Mar-25 826k, Apr-25 735k, May-25 685k, Jun-25 268k, Jul-25 88k, Aug-25 33k, Sept-25 27k
- Last Year: Jan-25 565k, Feb-25 627k, Mar-25 731k, Apr-25 712k, May-25 725k, Jun-25 707k, Jul-25 722k, Aug-25 669k, Sept-25 759k

Legend: Current Year — — — Last Year · · · · ·

YTD May 2025 vs LY

Room Nights +7.2%

3.36M to 3.6M

ADR +9.5%

$191 to $209

- Consortia 4.2%
- Non-Neg 52.2%
- Corporate 43.6%
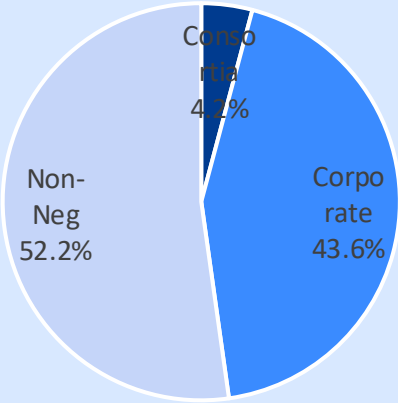
January - September 2025 Top 10 Origin for Air Passenger into Asia

- India 23%
- Japan 17%
- Indonesia 11%
- Russia 10%
- Thailand 8%
- Korea Republic Of 8%
- Vietnam 6%
- Philippines 6%
- Malaysia 6%
- China 5%
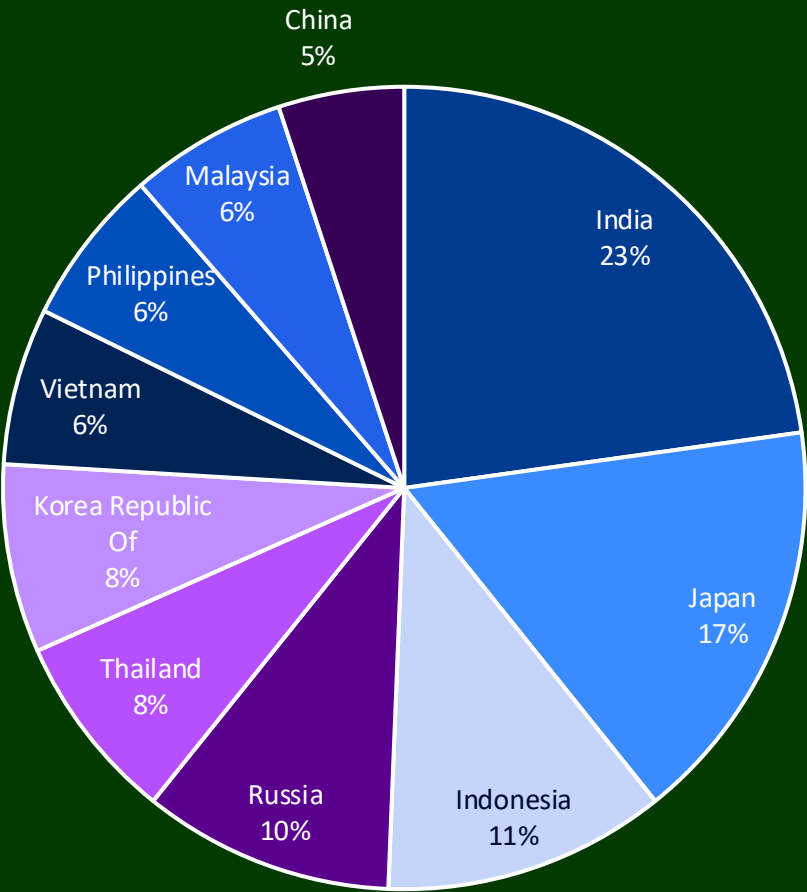
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Seoul
Performance On-the-books

January - September 2025
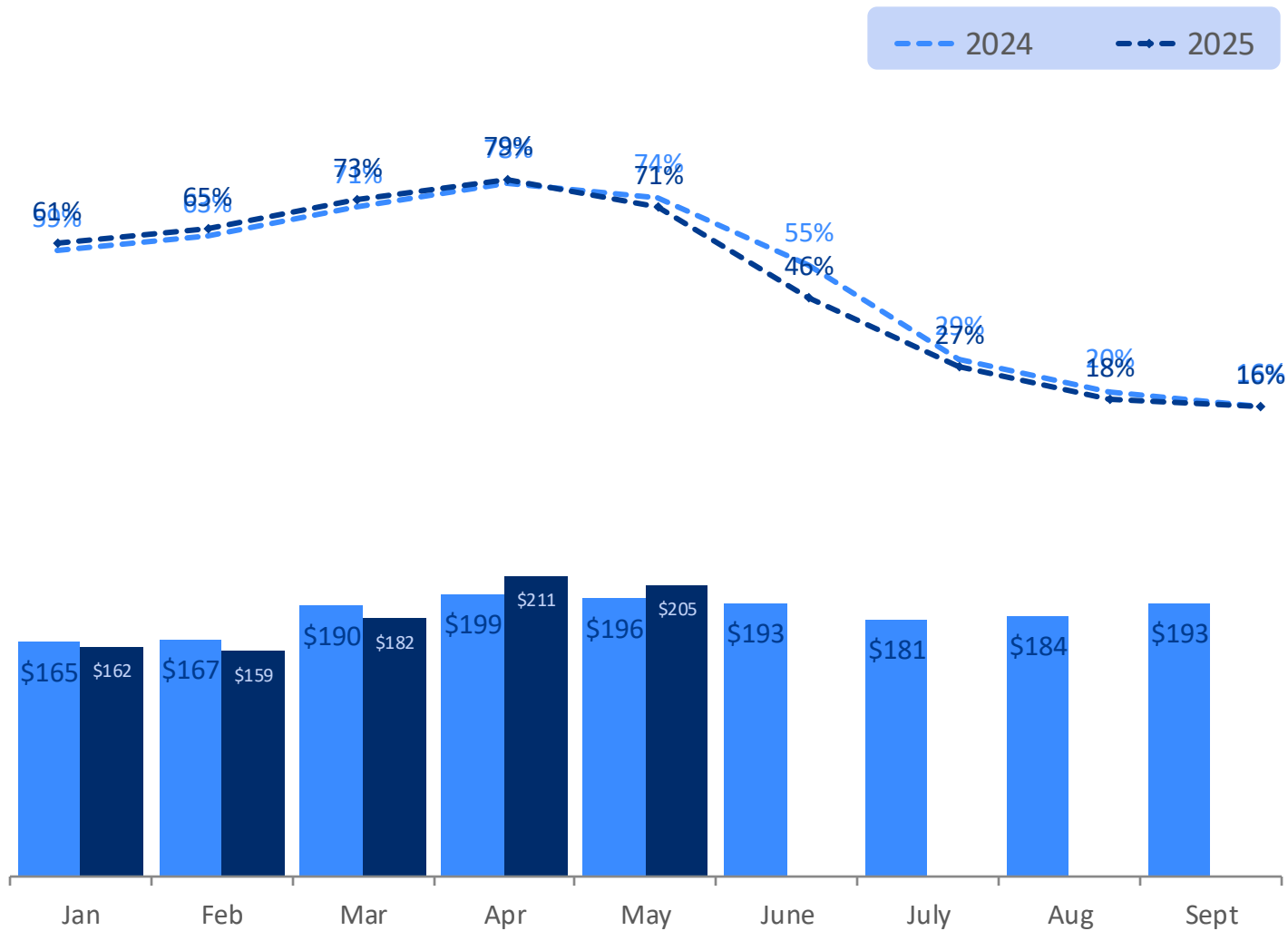OCC: 50.7% / ADR: $188
RevPAR: $87

January - September 2024
OCC: 51.3% / ADR: $186
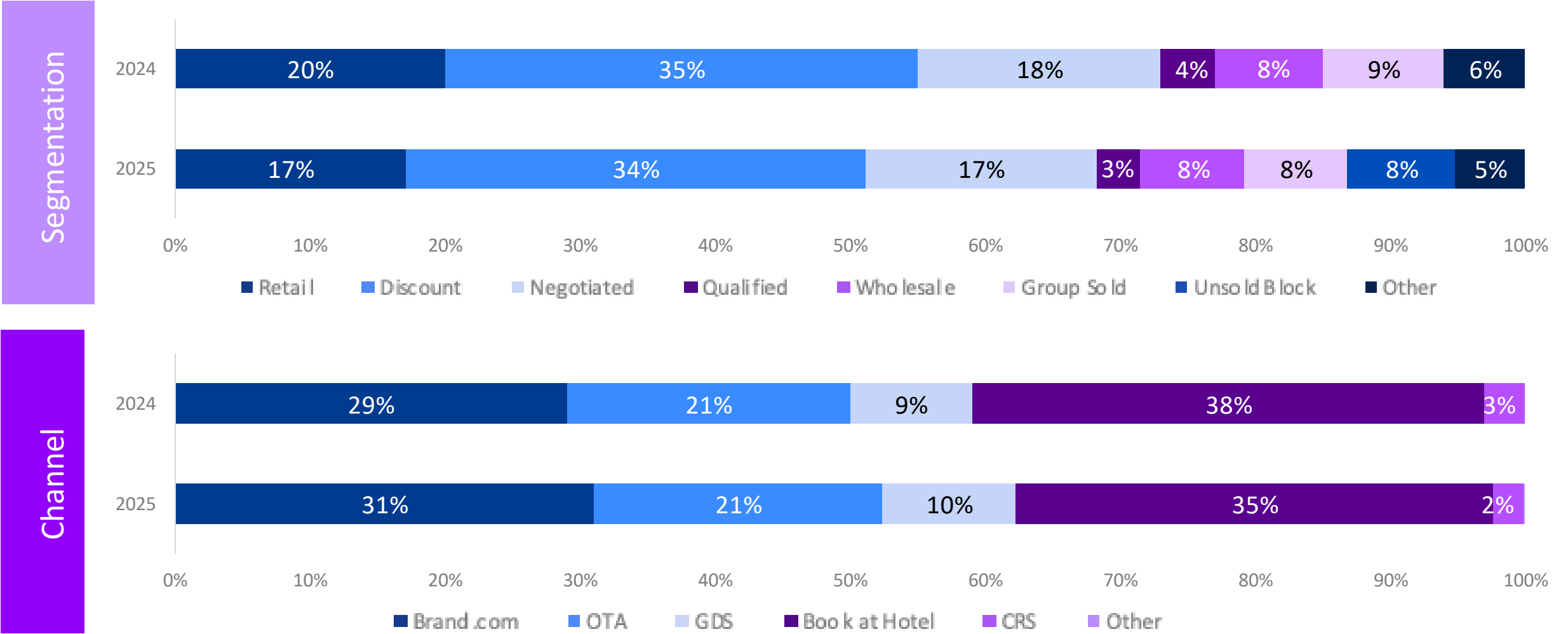RevPAR: $88

2025 Hotel Occupancy & ADR | Seoul
On-the-books by month compared to same time last year.

Legend: --- 2024   --- 2025

Occupancy line values:
- Jan: 61%, 61%
- Feb: 65%, 65%
- Mar: 73%, 73%
- Apr: 79%, 79%
- May: 74%, 71%
- June: 55%, 46%
- July: 39%, 27%
- Aug: 20%, 18%
- Sept: 16%

ADR bar values:
- Jan: $165 / $162
- Feb: $167 / $159
- Mar: $190 / $182
- Apr: $199 / $211
- May: $196 / $205
- June: $193
- July: $181
- Aug: $184
- Sept: $193

Source: Amadeus Demand360+® data as Jun 06, 2025 (USD)

Hotel Segmentation & Channel Mix | Seoul

Room Nights Mix for Jan – Sept 2025

Segmentation

	Retail	Discount	Negotiated	Qualified	Wholesale	Group Sold	Unsold Block	Other
2024	20%	35%	18%	4%	8%	9%		6%
2025	17%	34%	17%	3%	8%	8%	8%	5%

Channel

	Brand.com	OTA	GDS	Book at Hotel	CRS	Other
2024	29%	21%	9%	38%	3%	
2025	31%	21%	10%	35%	2%	

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Source: Amadeus Demand360+® data as Jun 06, 2025 (USD)

Hotel ADR in Seoul

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

Forward Looking

$288

$230

$173

$115

$58

$0

Dec   Jan   Feb   Mar   Apr   May   Jun   Jul   Aug   Sep   Oct

Series1   Current year   Series2   Previous year

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Source: Navigator360™ as of Sunday, 8 June 2025
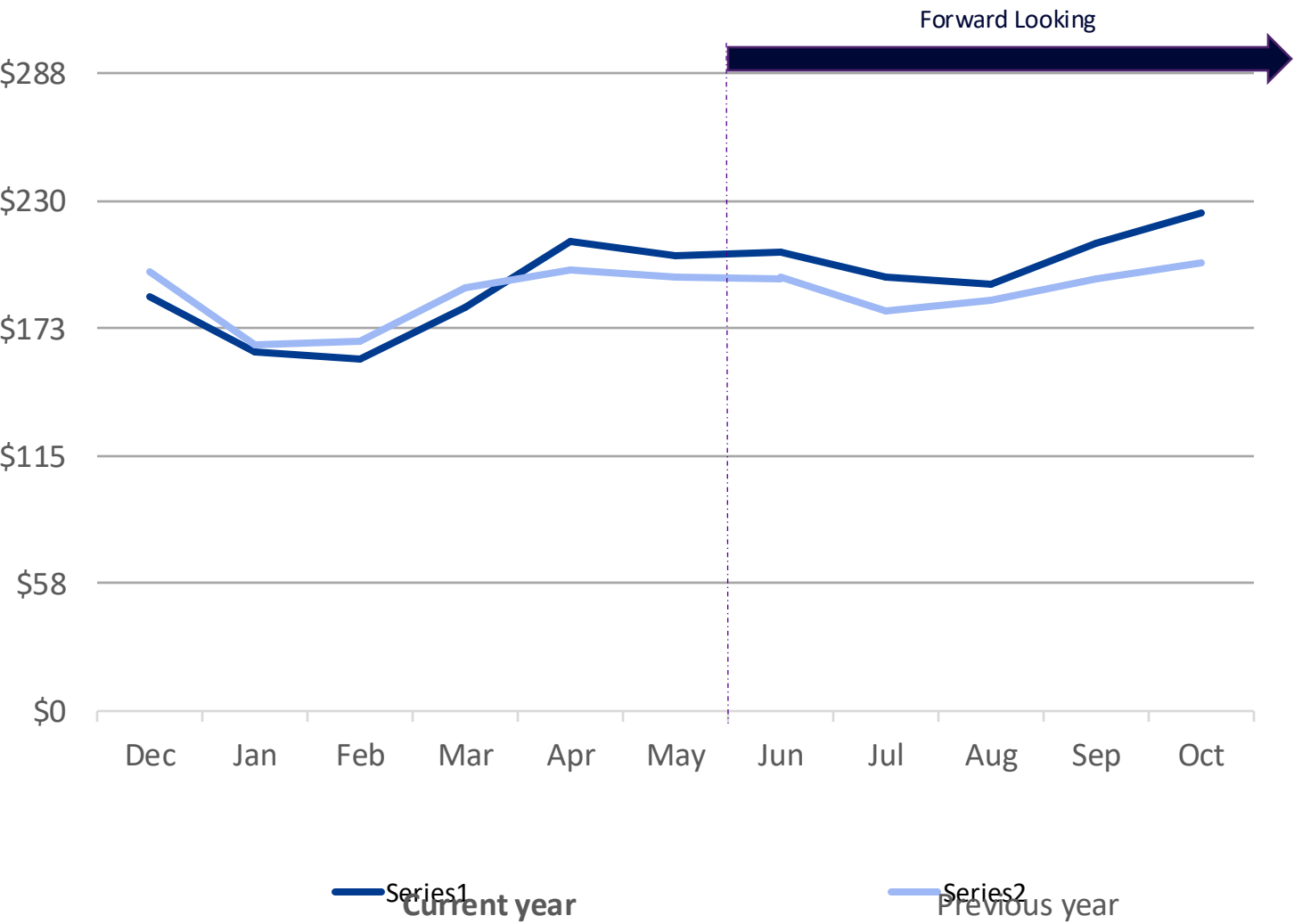
Multiple choice ⌄
41 votes

🗑 ⚙ Poll settings

2025년 서울의 GDS 채널 평균 요금은 얼마입니까?

✅ **$206**   🗑

████████████████████████████░░░░░░ 61%

◯ $188

██████████░░░░░░░░░░░░░░░░░░░░░░░ 27%

◯ $135

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◯ $289

███░░░░░░░░░░░░░░░░░░░░░░░░░░░░░░ 7%

◯ $355

█░░░░░░░░░░░░░░░░░░░░░░░░░░░░░░░░ 2%

2025 GDS Performance | Seoul

GDS Room Nights

Current Year values: 26k, 40k, 48k, 48k, 44k, 20k, 7k, 3k, 2k
Last Year values: 30k, 30k, 45k, 48k, 43k, 43k, 41k, 37k, 42k

Months: Jan-25, Feb-25, Mar-25, Apr-25, May-25, Jun-25, Jul-25, Aug-25, Sept-25

--- Current Year   ---- Last Year
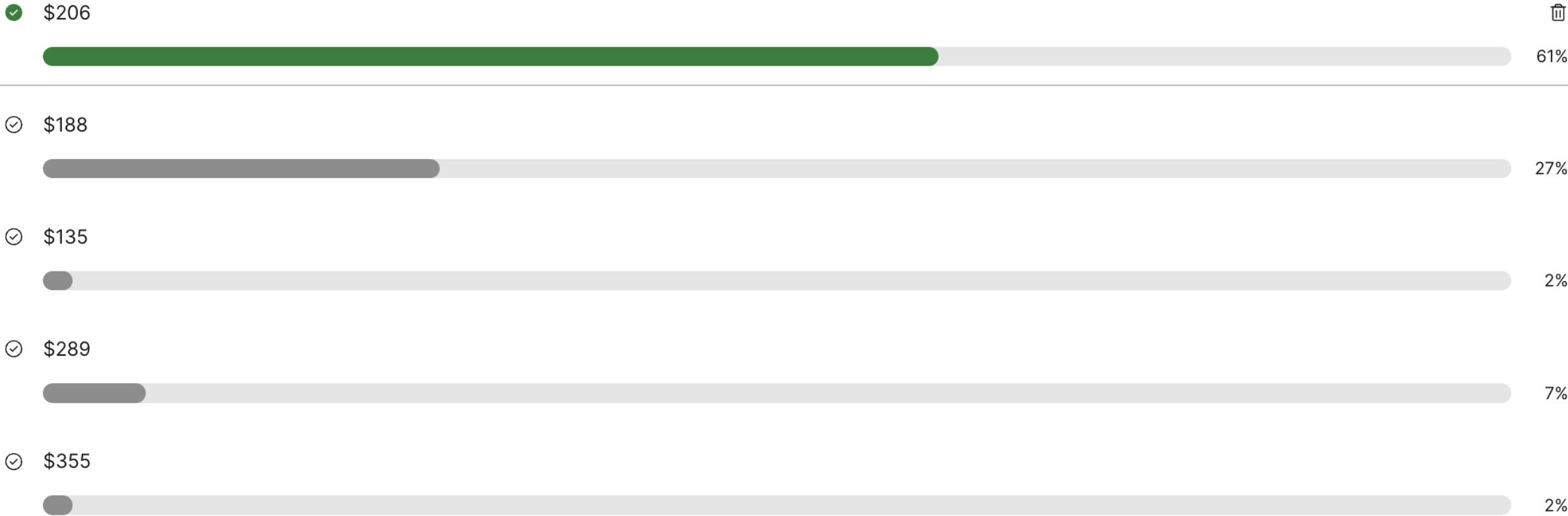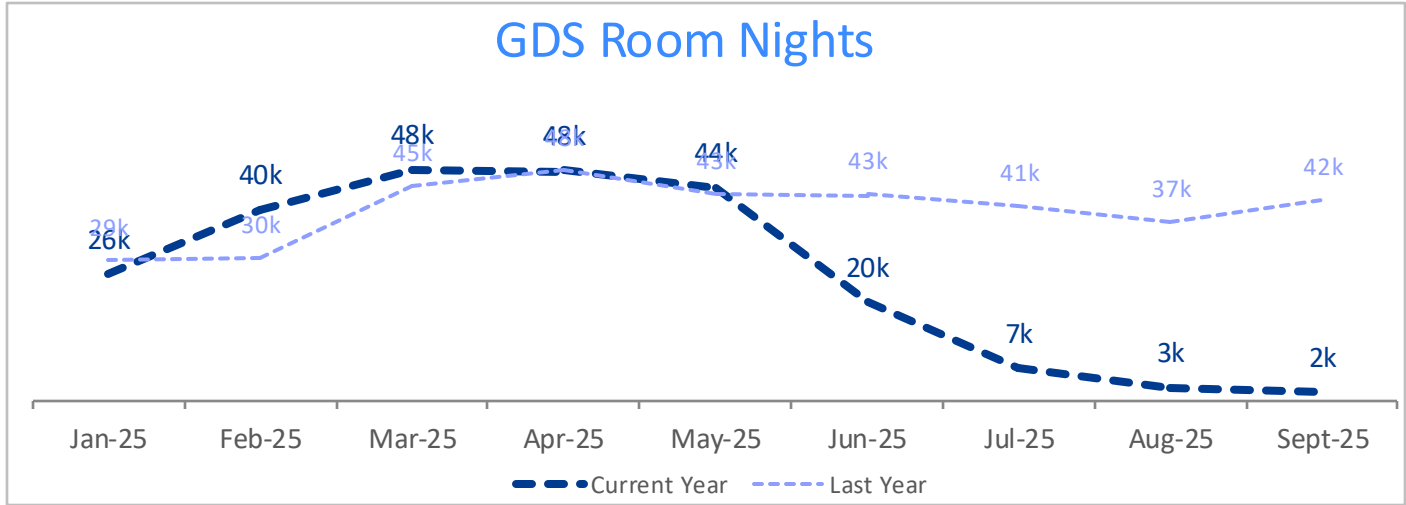
YTD May 2025 vs LY

Room Nights +5.8%

195.1K to 206.4K

ADR -1.0%

$206 to $208

Pie chart:
- Corporate 84.5%
- Non-Neg 8.6%
- Consortia 6.9%

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Word cloud
20 votes

Poll settings
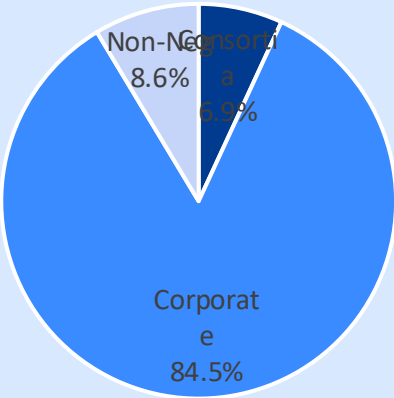
매일 비즈니스 의사 결정을 위해 사용하는 가장 유용하고 영향력 있는 기술은 무엇입니까?

Review answers 21 >
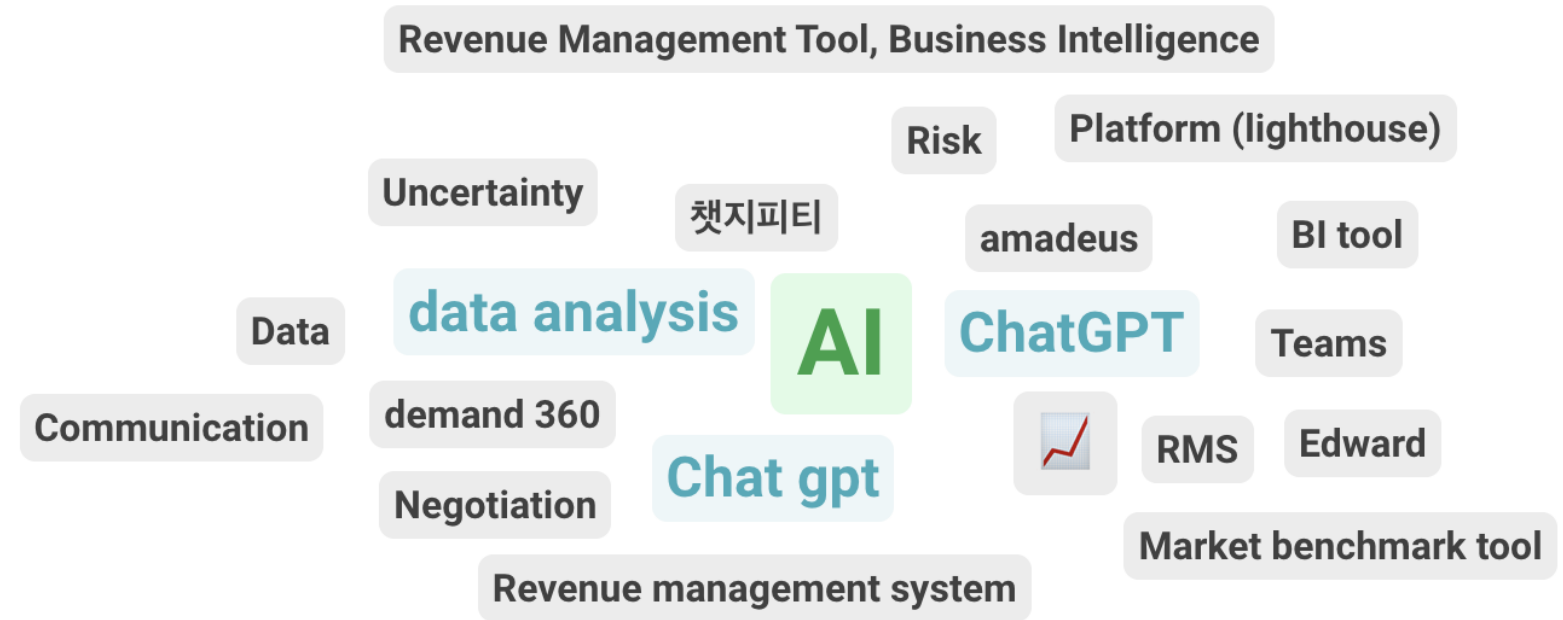
Revenue Management Tool, Business Intelligence

Risk

Platform (lighthouse)

Uncertainty

챗지피티

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BI tool

Data

data analysis

AI

ChatGPT

Teams

Communication

demand 360

📈

RMS

Edward

Chat gpt

Negotiation

Market benchmark tool

Revenue management system

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Hotels See AI as Their
Trusted Digital Ally
for the Future of
Hospitality

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Crafting Memorable Travel Experiences
Demand Constant Reinvention from Hoteliers

Having the most tempting offer

How to craft personalized offers amid vast traveler data?

Standing out from the competition

How to effectively communicate your unique value in a sea of choices?

Managing the unexpected

How to quickly turn sudden changes into opportunities?

Making travelers' stays unforgettable

How to ensure consistent, high-quality service across all guest touchpoints?

We firmly believe that AI has the potential to enhance every stage of the traveler journey

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Inform & inspire
Providing travel ideas and sparking bookings

Plan & book
Creating traveler-centric search and shopping experiences

On trip
More intuitive and personalized ways to meet travelers' needs

Post-trip
Maintain traveler relationship between trips and evaluate customer sentiment

Hotels See AI as Their
Trusted Digital Ally
for the Future of Hospitality

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98%

of hoteliers recognize that AI has the potential to bring significant benefits.

Technologies expected to make the biggest impact in the next 12 months

#1 Artificial intelligence

#2 Digital Payments

#3 Data Analytics

Top benefits expected by hoteliers:

49%	46%	44%	43%	41%
Offer upsell opportunity	Personalize experience for guests	Drive efficiencies	Automatically generate content	Understand insights

Source: Travel Technology Investment Trends report

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Hotels Are Betting Big on **AI** | Real-world Use Cases

INSPIRATION	BUYING	EXPERIENCING	POST STAY

RADISSON HOTELS

HYATT®

Hilton

FOUR SEASONS

AI-powered agent that helps personalize marketing content to resonate with local audiences, by automating ad creation, localization, and translation.

AI-powered booking engine that analyzes customer data to recommend specific hotels and add-ons based on preferences.

AI-driven concierge, "Connie", provides instant assistance with local recommendations, directions, and answering common guest questions.
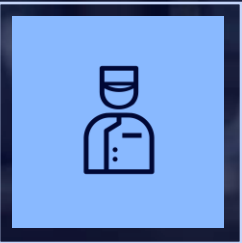
AI-driven sentiment analysis to scan reviews and social media, identifying pain points and refining services to boost guest satisfaction.

- **22% increase** in ad-driven revenue
- **50% increase** in productivity

$40 million in revenue boost in just 6 months

50% decrease in concierge desk time

31% increase in problem resolution satisfaction

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Leading with Balance

Key to success: Merging AI, Automation, and Human Expertise

Personalization at scale:

Use **AI** to turn guest data into dynamic, real-time experiences: before, during, and after the stay.

Smarter Operations:

Streamline tasks with automation and predictive tools, freeing staff to focus on meaningful service.

Agile Differentiation:

Leverage AI-driven insights to adapt to evolving guest expectations, refine brand messaging, and stay ahead of changing market dynamics.

Visit our website to learn more about Hospitality Market Insights.

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

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SEOUL 20 June 2025