



aMADEUS

Hospitality

Market Insights Report

December 2024

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Top 10 Cities for Airline Outbound | Worldwide

Understand how most searched cities rank against the most booked cities into December 2024.

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

Source: Amadeus Navigator360™ data as of 20 November, 2024

Highlights

- For December 2024, Bangkok is again the most searched and booked destination worldwide.
- London is the second most searched market, but only the 4th most booked.

LEGEND

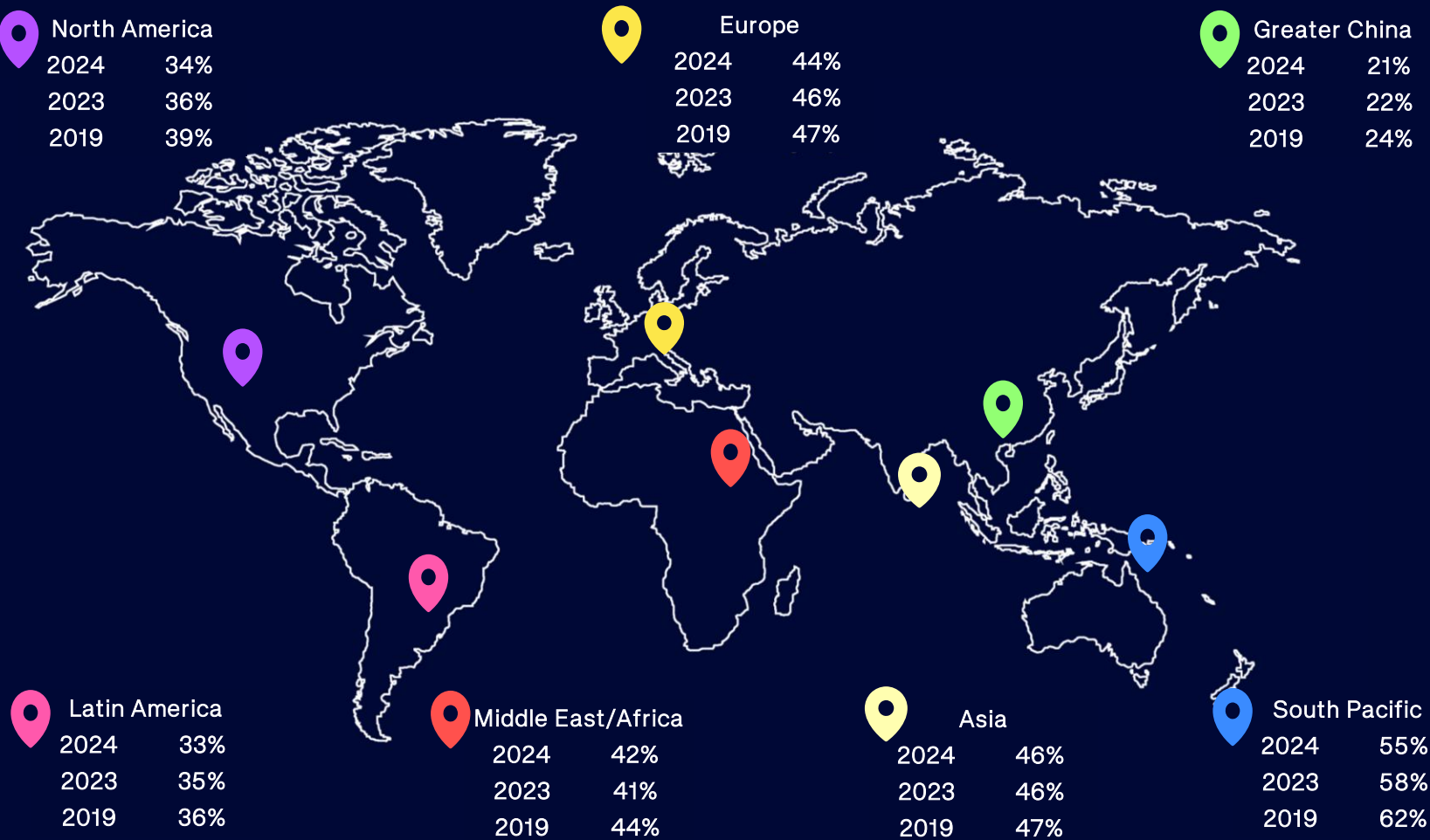
- ↘ Position dropped from searched to booked
- ↗ Position improved from searched to booked
- = Same position in top 10 searched & booked
- ↓ Not one of top 10 booked cities



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Hotel Occupancy by Region | Worldwide

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



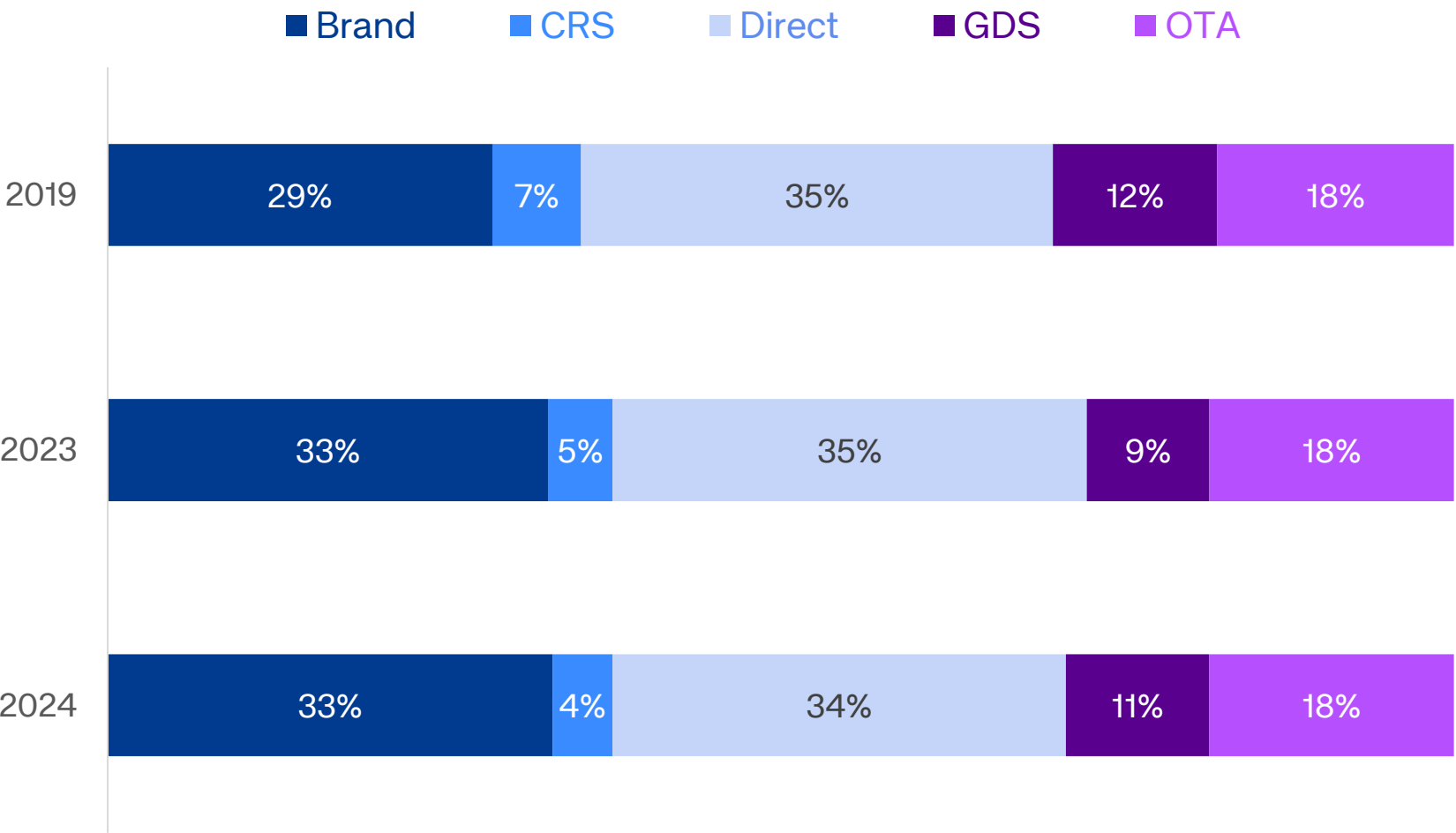
Highlights

- South Pacific is leading occupancy levels worldwide, followed by Europe, as it did a month ago.
- Middle East is the only region exceeding last year's occupancy levels. All regions are pacing under 2019 levels.

Note that the hospitality insights included are based on the current database of properties reporting their insights as of Nov 22, 2024. Therefore, the insights for October represent a change compared to the data reporting in previous years.

Hotel Channel Mix | Worldwide

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



Note that the hospitality insights included are based on the current database of properties their insights as of 22 November 2024. Therefore, the insights for November represent a change compared to the data report in previous years

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Source: Amadeus Demand360® data as of 22 November, 2024.

Highlights

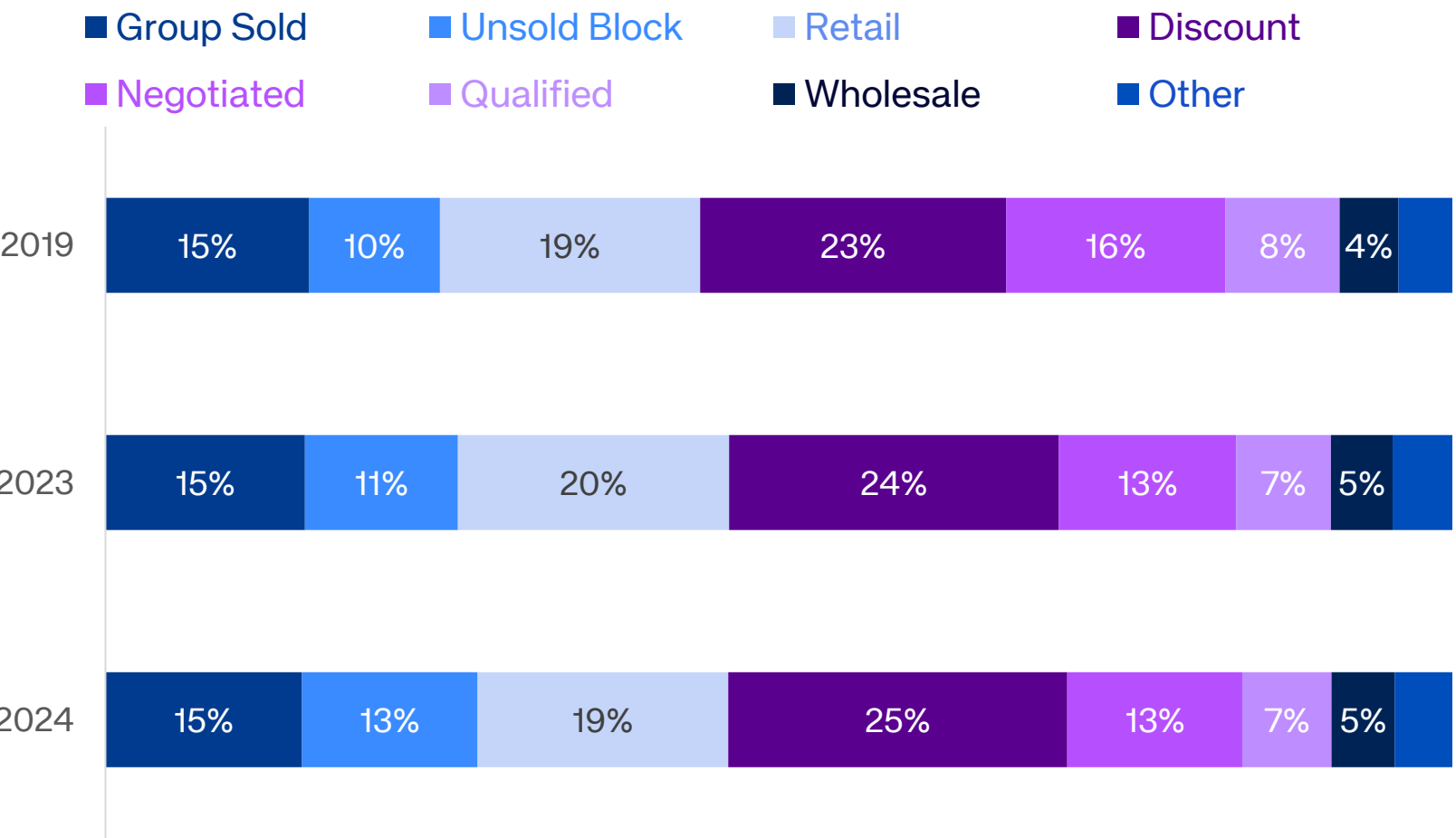
- Brand is showing a healthy increase against same time last year and 2019.
- GDS contribution continues growing year-on-year, slightly behind 2019.
- Direct is now just one point ahead of Brand.



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Hotel Segmentation | Worldwide

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



Note that the hospitality insights included are based on the current database of properties their insights as of 22 November 2024. Therefore, the insights for November represent a change compared to the data report in previous years

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Source: Amadeus Demand360® data as of 22 November, 2024.

Highlights

- Into December, Transient business is dominated by Discount sales, shifting from Retail.
- Groups show a nice year on year increase into Unsold Blocks while Groups sold maintains a steady share, indicating that confirmations are occurring closer to check-n than before.

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United States

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Top 10 Cities for Airline Inbound YoY | U.S.

Top international airline searches into the U.S. for December 2024 and last year.

Searched Year on Year

	2023	Vs.	2024
1	London, UK	=	London, UK
2	Toronto, Canada	=	Toronto, Canada
3	Sao Paulo, Brazil	=	Sao Paulo, Brazil
4	Paris, France	↘	Tokyo, Japan
5	Seoul, Korea (ROK)	↘	Paris, France
6	Tokyo, Japan	↗	Seoul, Korea (ROK)
7	Frankfurt am Main, Germany	↘	Mexico City, Mexico
8	Montreal, Canada	↓	Frankfurt am Main, Germany
9	Mexico City, Mexico	↗	Vancouver, Canada
10	San Juan, Puerto Rico	↓	Buenos Aires, Argentina

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

- There is no variance among the top 3 origin cities for air travel into the U.S. when comparing year-on-year.
- Montreal and San Juan are dropping from Top 10 this year.

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Source: Amadeus Navigator360™ data as of 20 November, 2024

Top 10 Cities for Airline Inbound | U.S.

Top airline searches (international only) vs. bookings for December 2024.

	Searched	Vs.	Booked
1	London, UK	↘	Toronto, Canada
2	Toronto, Canada	↗	London, UK
3	Sao Paulo, Brazil	↓	Mexico City, Mexico
4	Tokyo, Japan	=	Tokyo, Japan
5	Paris, France	↓	Seoul, Korea (ROK)
6	Seoul, Korea (ROK)	↗	Vancouver, Canada
7	Mexico City, Mexico	↗	Buenos Aires, Argentina
8	Frankfurt am Main, Germany	=	Frankfurt am Main, Germany
9	Vancouver, Canada	↗	Montreal, Canada
10	Buenos Aires, Argentina	↗	Calgary, 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

Highlights

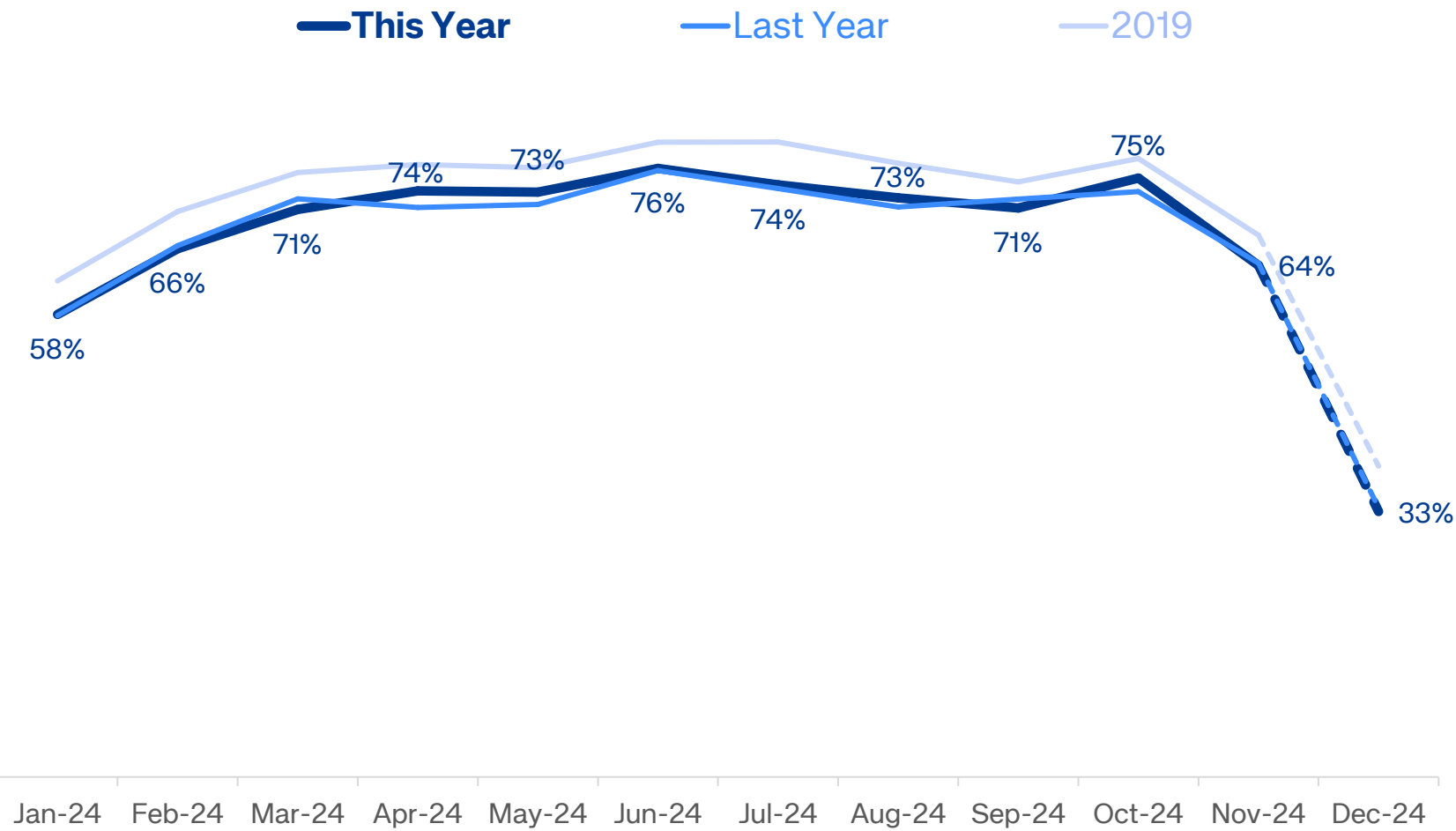
- The top 2 origin cities travelling into the U.S. in December 2024 are London and Toronto, both in terms of air searches and bookings.
- Despite being part of the top 10 searched origin cities, large markets Sao Paulo and Paris are not among the top 10 to be booked.

Source: Amadeus Navigator360™ data as of 20 November, 2024



Hotel Occupancy | United States

On-the-books by month compared to same time last year and 2019.



Note that the hospitality insights included are based on the current database of properties their insights as of 22 November 2024. Therefore, the insights for November represent a change compared to the data report in previous years

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Source: Amadeus Demand360® data as of 22 November, 2024.



Highlights

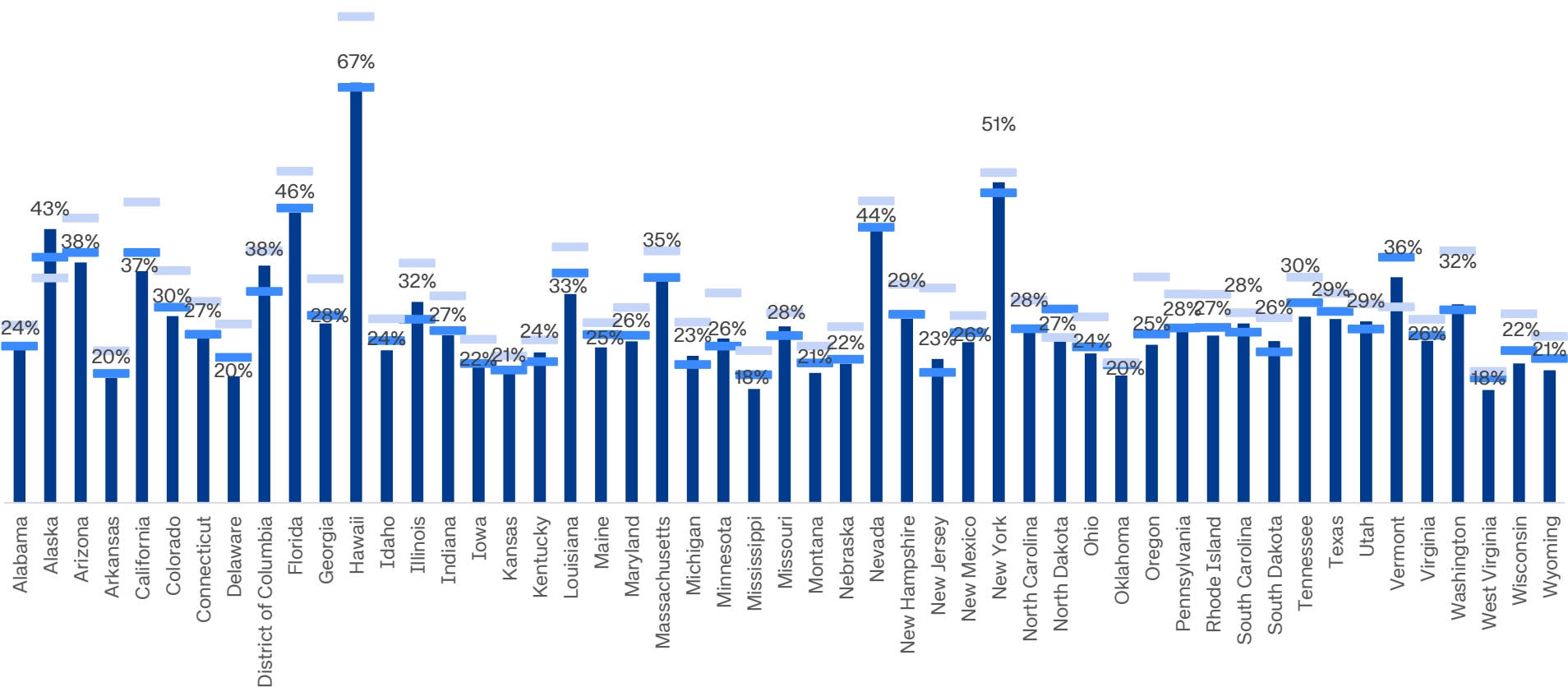
- December 2024 is 1.0 percentage point behind last year's occupancy and behind 2019 by 4.0 percentage points.

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Hotel Occupancy by State | United States

On-the-books total occupancy by state for December 2024 vs. last year and 2019.

■ 2024 — 2023 — 2019



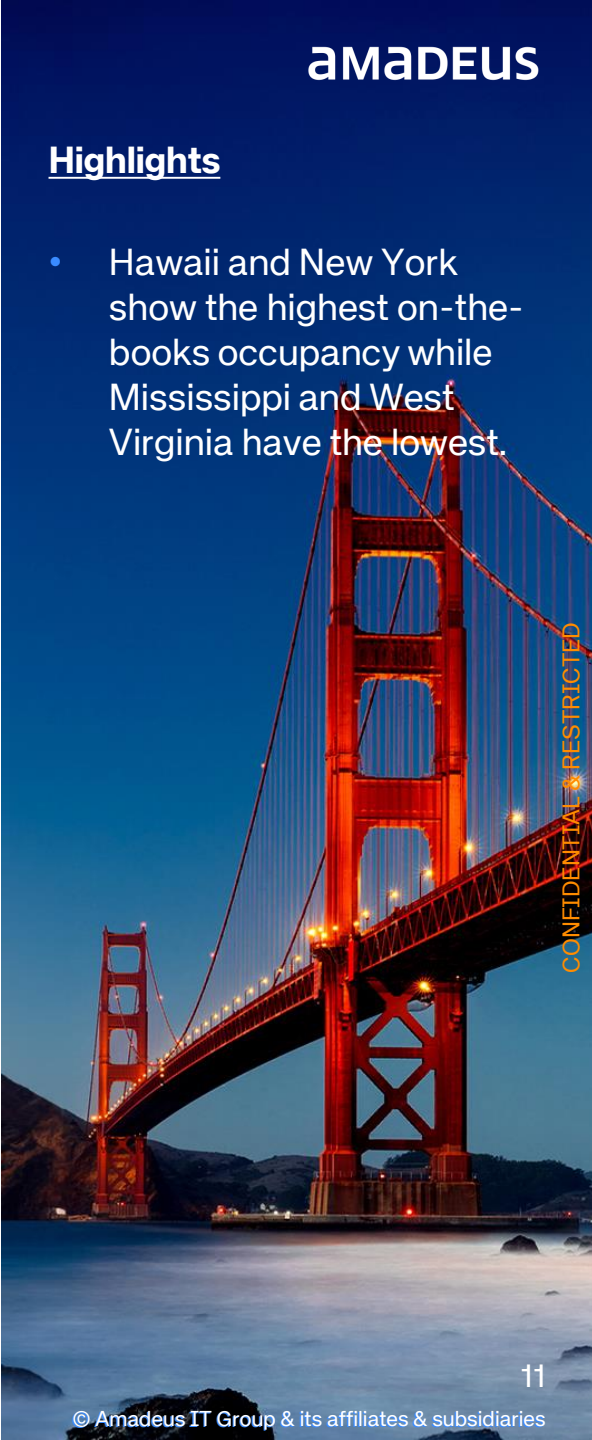
Highlights

- Hawaii and New York show the highest on-the-books occupancy while Mississippi and West Virginia have the lowest.

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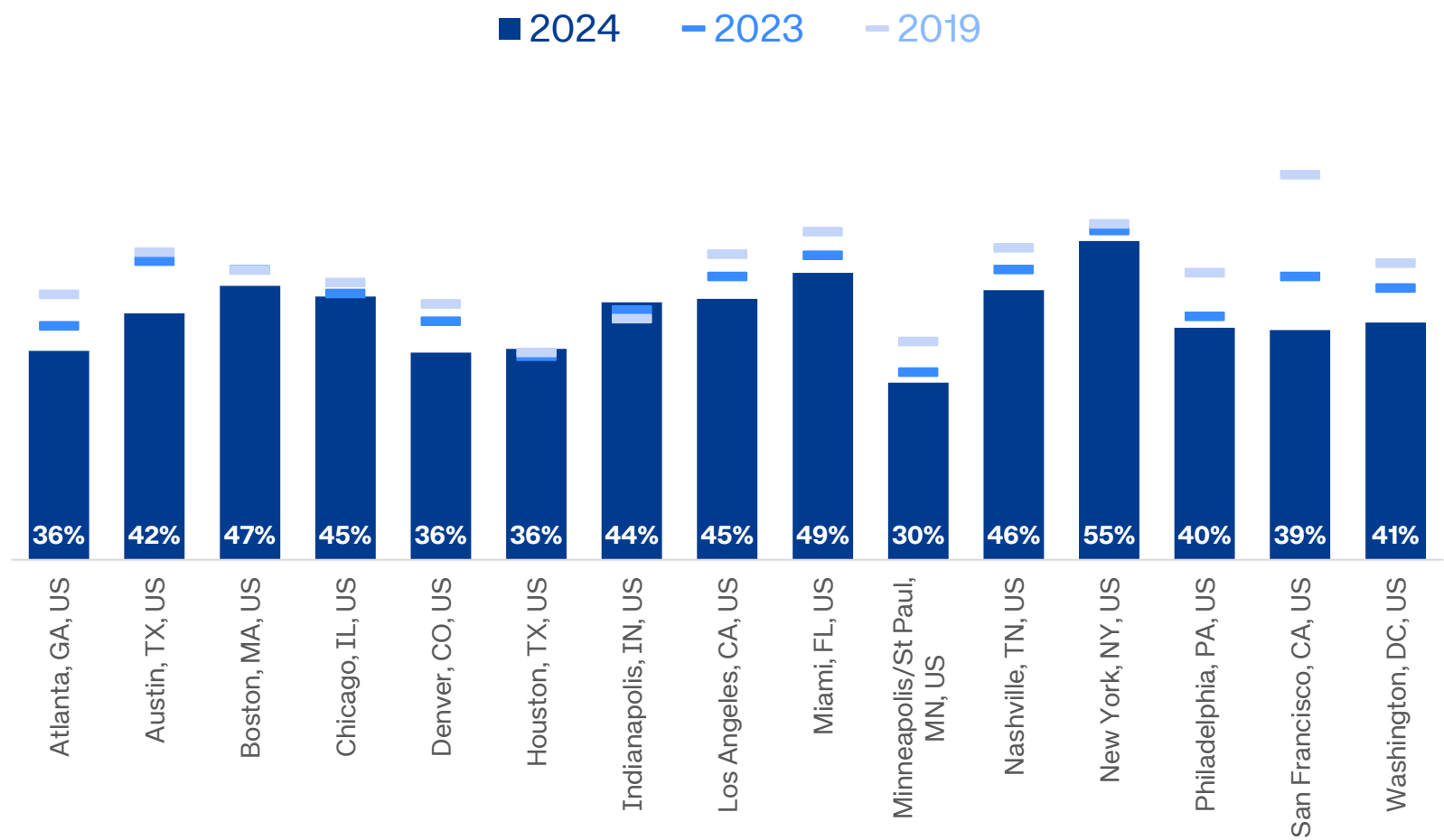
Source: Amadeus Demand360® data as of 22 November, 2024.



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Hotel Occupancy by Market | United States

On-the-books total occupancy for December 2024 vs. same time last year and 2019.



Note that the hospitality insights included are based on the current database of properties their insights as of 22 November 2024. Therefore, the insights for November represent a change compared to the data report in previous years

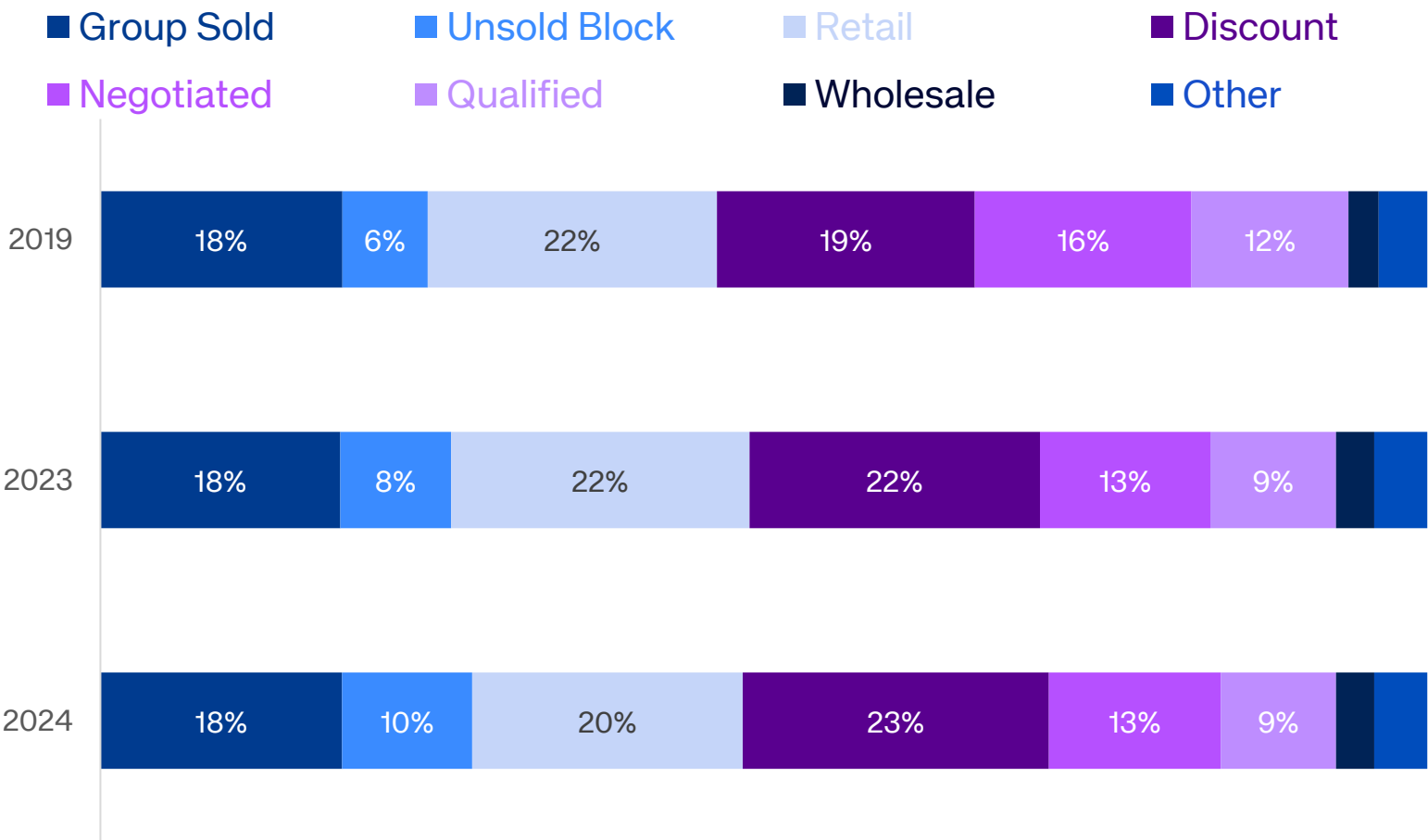


Highlights

- New York has the highest on-the-books occupancy, while Minneapolis has the lowest.

Hotel Segmentation | United States

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



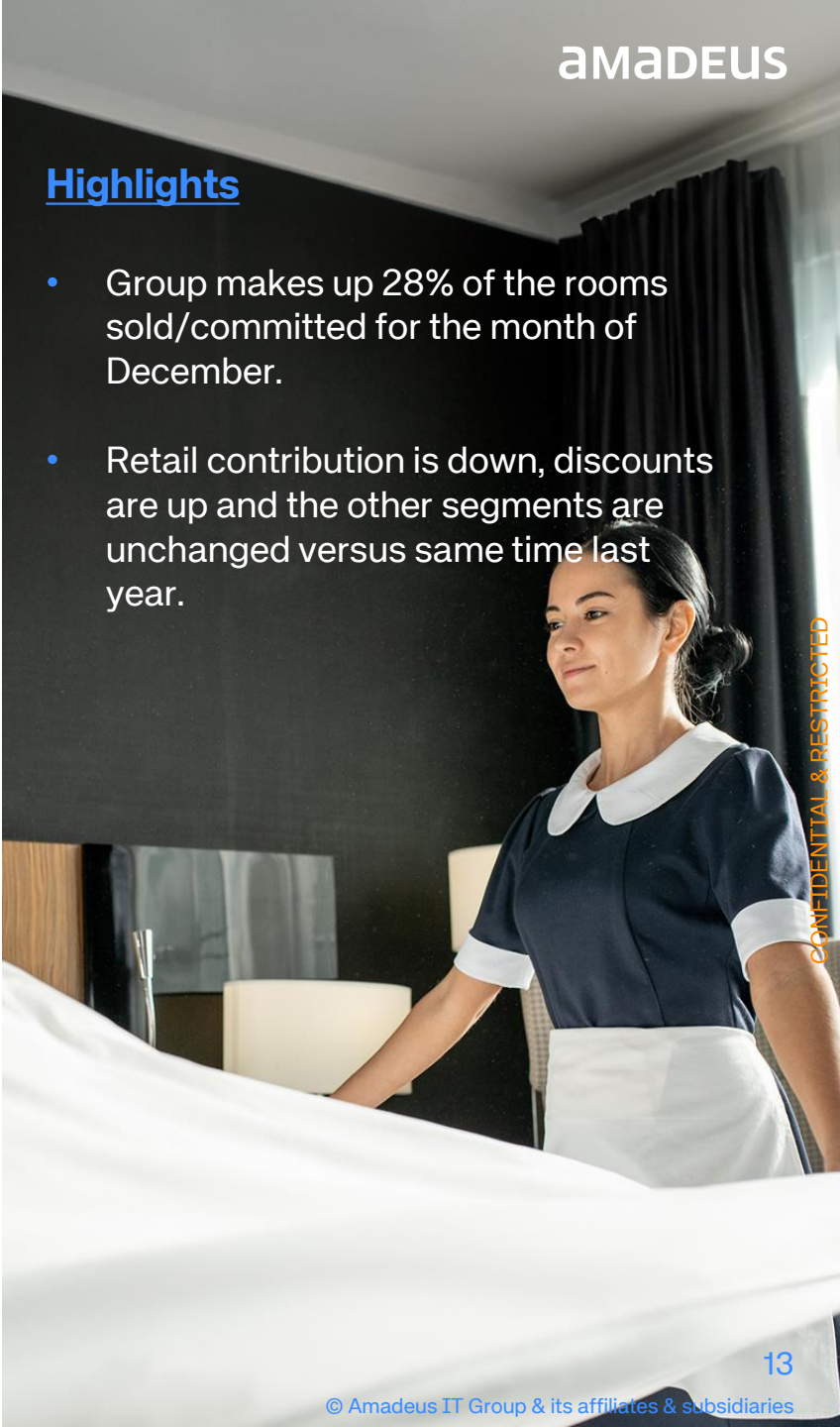
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Source: Amadeus Demand360® data as of 22 November, 2024.

Highlights

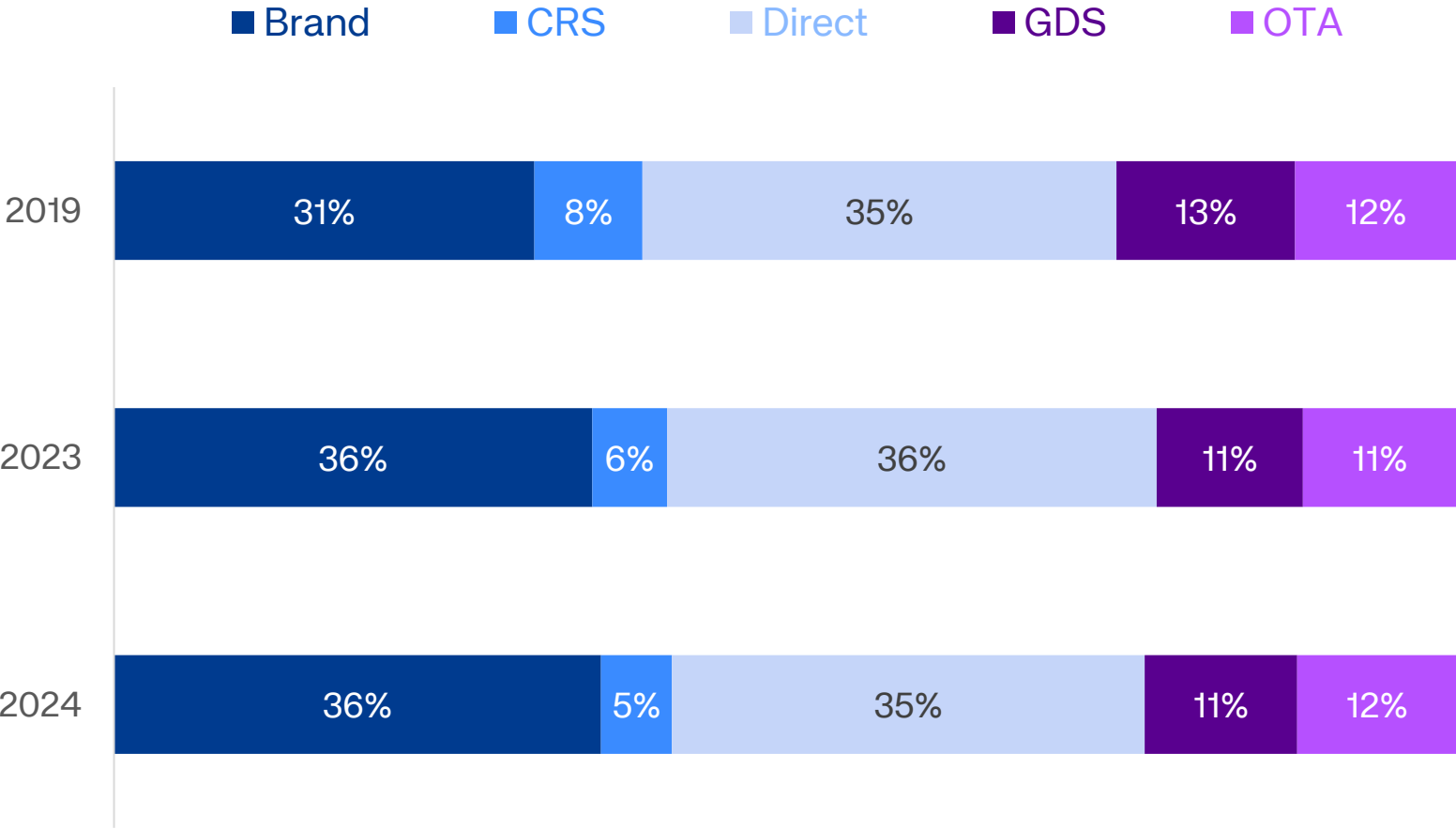
- Group makes up 28% of the rooms sold/committed for the month of December.
- Retail contribution is down, discounts are up and the other segments are unchanged versus same time last year.



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Hotel Channel Mix | United States

On-the-books distribution for December 2024 vs. same time last year and 2019.



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Source: Amadeus Demand360® data as of 22 November, 2024.

Highlights

- There is a slight shift from CRS/Direct to OTA versus same time last year.



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Canada



Top 10 Cities for Airline Inbound YoY | Canada

Top international airline searches into Canada for December 2024 and last year.

Searched Year on Year

	2023	Vs.	2024
1	US: Others	=	US: Others
2	London, UK	=	London, UK
3	Delhi, India	↘	New York City, USA
4	New York City, USA	↗	Delhi, India
5	Paris, France	↘	Tokyo, Japan
6	Hong Kong, Hong Kong SAR	↘	Paris, France
7	Los Angeles, USA	↘	Seoul, Korea (ROK)
8	Seoul, Korea (ROK)	↗	Los Angeles, USA
9	Tokyo, Japan	↗	Hong Kong, Hong Kong SAR
10	Cancun, Mexico	↓	Sao Paulo, Brazil

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

- Into December, the top two markets have not changed year on year.
- From the remaining cities, only Cancun drops from top 10 this year.

Source: Amadeus Navigator360™ data as of 20 November, 2024

Top 10 Cities for Airline Inbound | Canada

Top airline searches vs. bookings in December 2024.

	Searched		Booked
1	US: Others	=	US: Others
2	London, UK	↘	New York City, USA
3	New York City, USA	↗	London, UK
4	Delhi, India	↘	Los Angeles, USA
5	Tokyo, Japan	↓	Paris, France
6	Paris, France	↗	San Francisco, USA
7	Seoul, Korea (ROK)	↘	Delhi, India
8	Los Angeles, USA	↗	Seoul, Korea (ROK)
9	Hong Kong, Hong Kong SAR	↓	Chicago, USA
10	Sao Paulo, Brazil	↓	Mexico City, Mexico

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

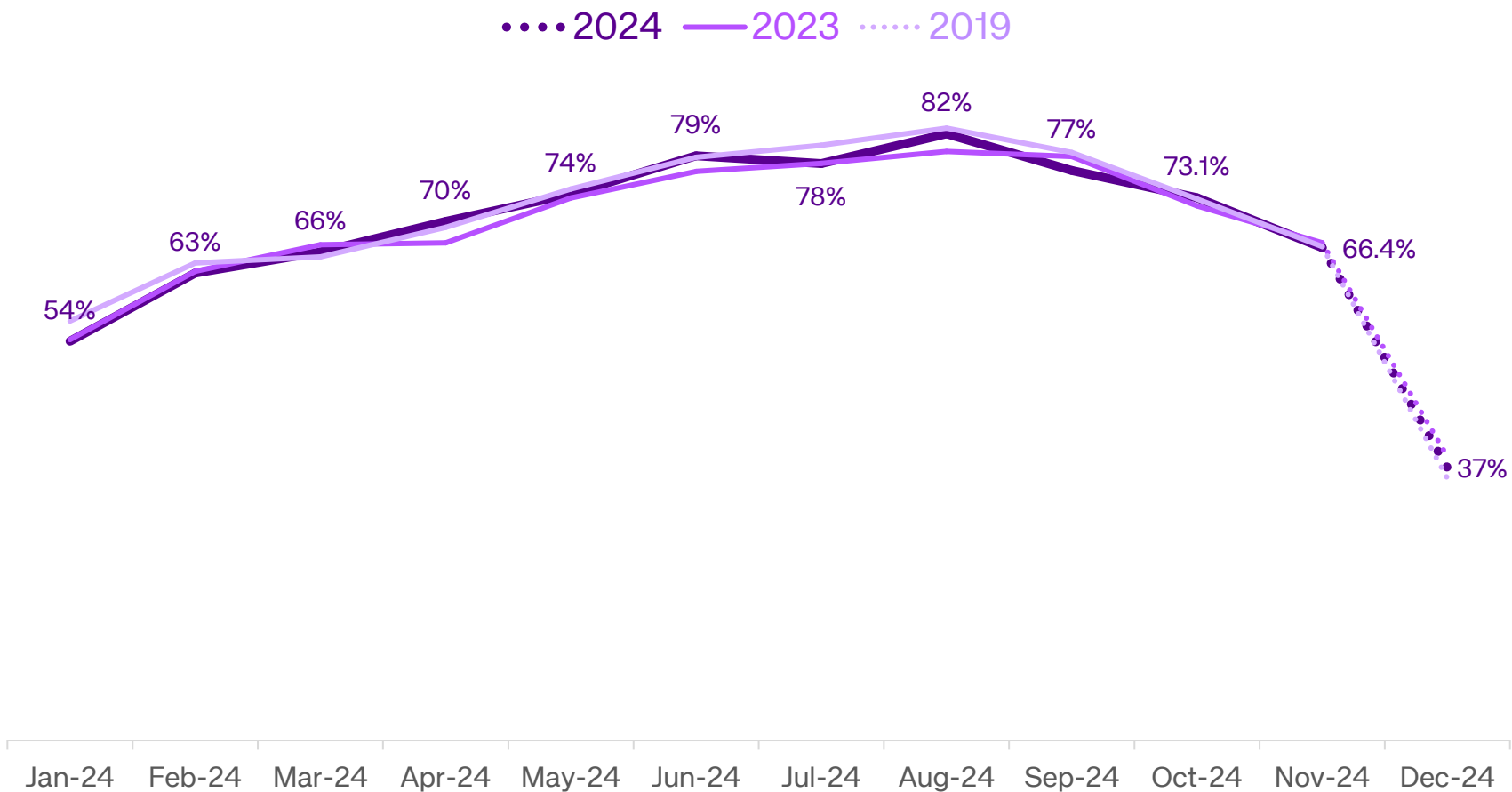
Highlights

- Small US markets (“Others”) lead searches and bookings into Canada, followed by London and New York City.
- Los Angeles is the market to look at, as it jumps from 8th position searching for flights to 4th booking flights into Canada.

Source: Amadeus Navigator360™ data as of 20 November, 2024

Hotel Occupancy | Canada

On-the-books by month compared to same time last year and 2019.



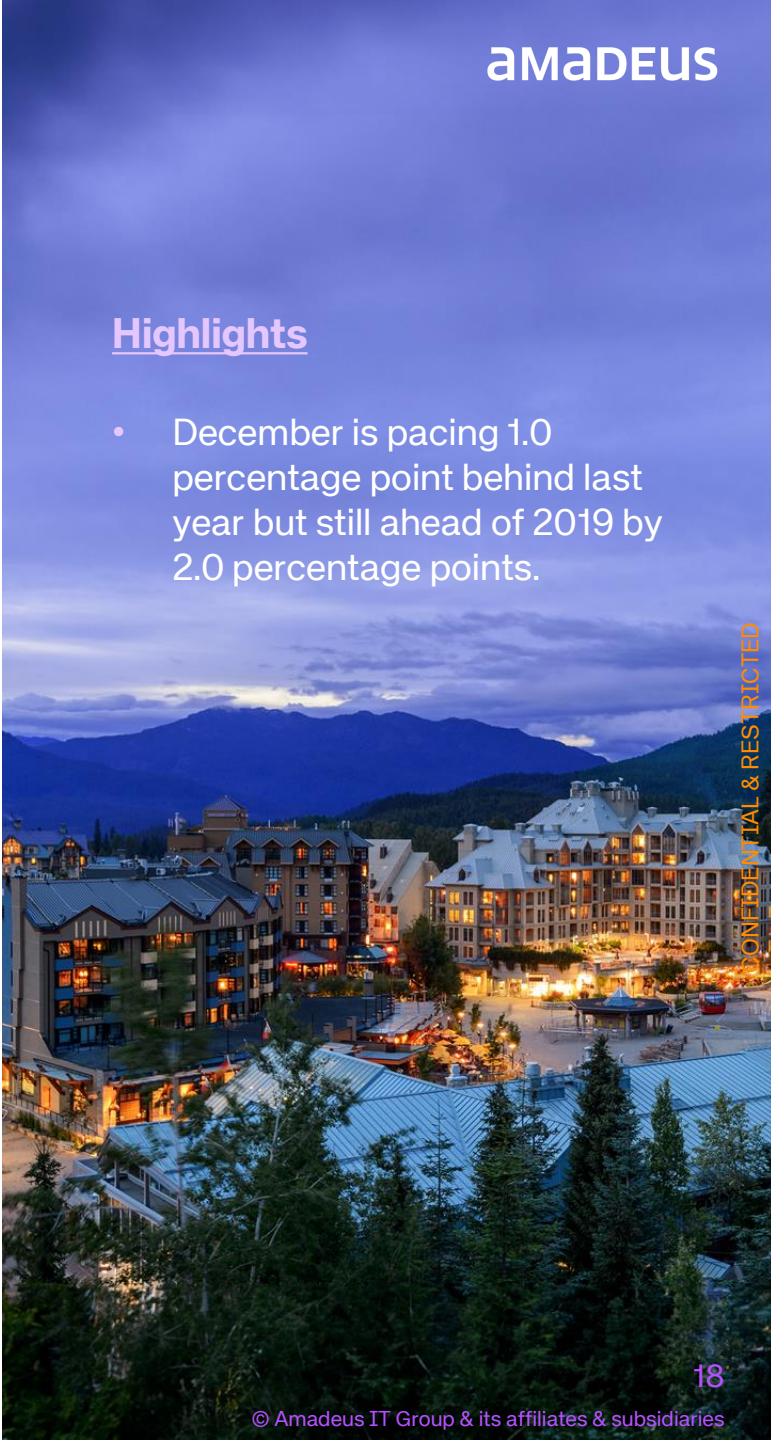
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Source: Amadeus Demand360® data as of 22 November, 2024.

Highlights

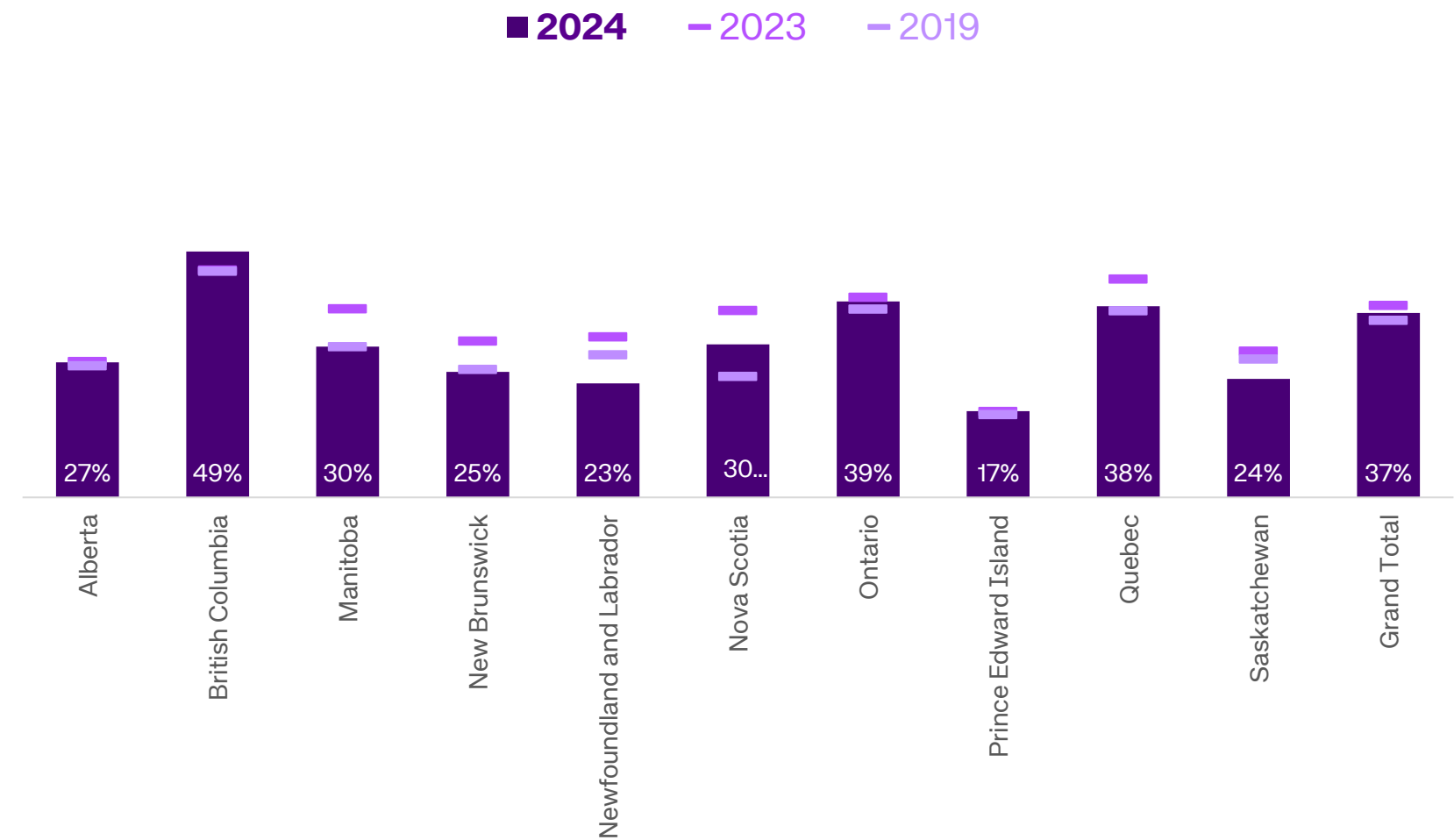
- December is pacing 1.0 percentage point behind last year but still ahead of 2019 by 2.0 percentage points.



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Hotel Occupancy by Province | Canada

On-the-books total occupancy by province for December 2024 vs. last year and 2019.



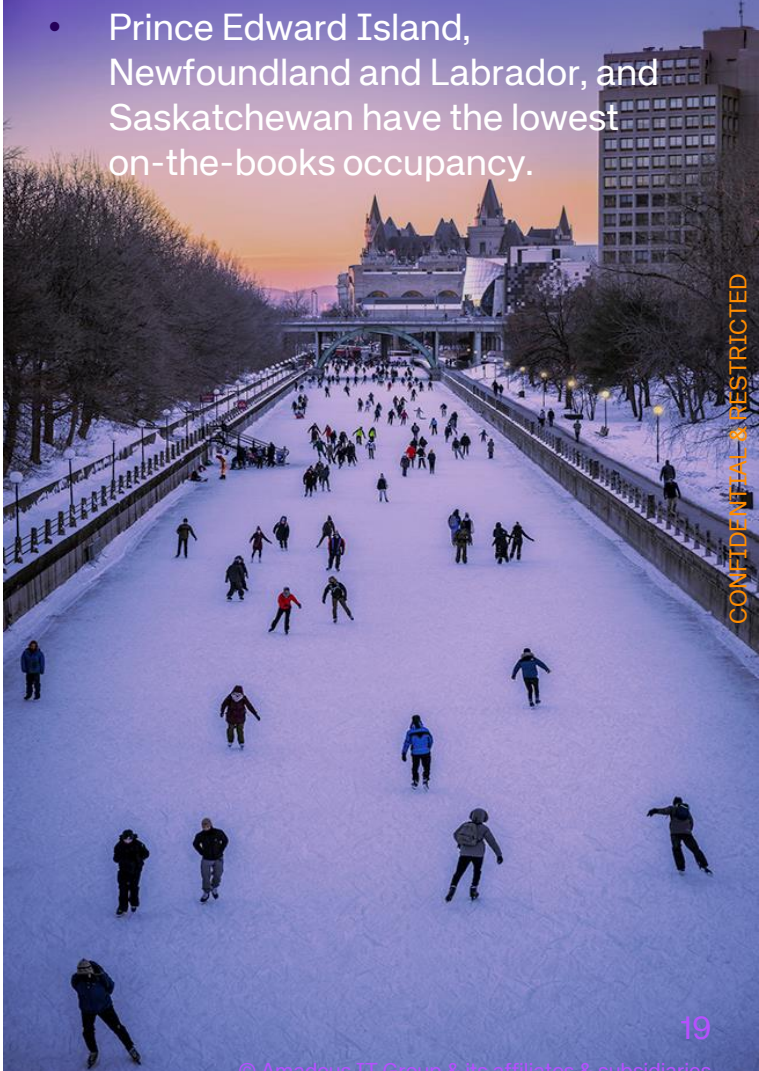
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Source: Amadeus Demand360® data as of 22 November, 2024.

Highlights

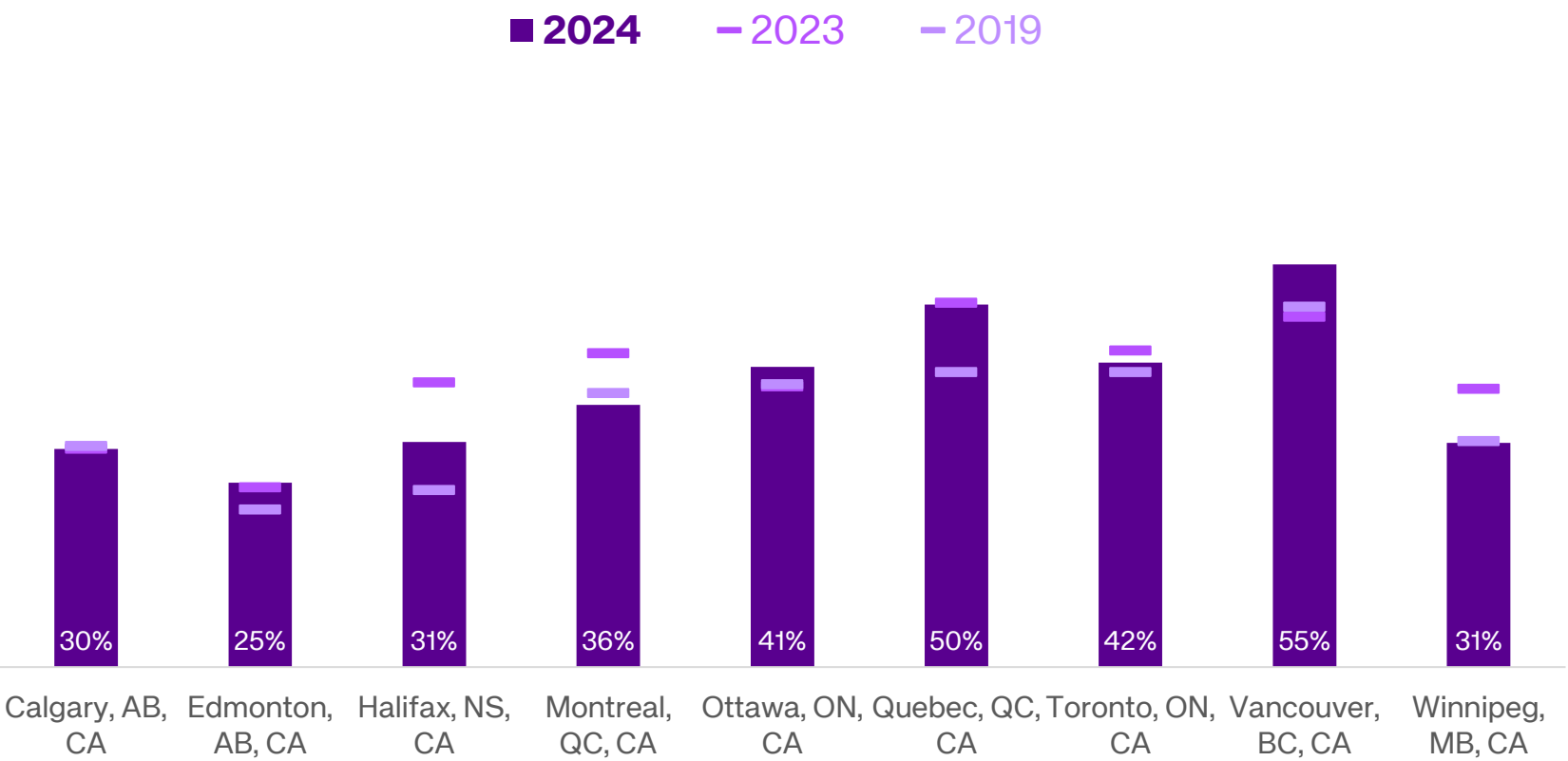
- British Columbia has the highest occupancy for December.
- Prince Edward Island, Newfoundland and Labrador, and Saskatchewan have the lowest on-the-books occupancy.



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Hotel Occupancy by Market | Canada

On-the-books total occupancy by market for December 2024 vs. last year and 2019.



Note that the hospitality insights included are based on the current database of properties their insights as of 22 November 2024. Therefore, the insights for November represent a change compared to the data report in previous years

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Source: Amadeus Demand360® data as of 22 November, 2024.

Highlights

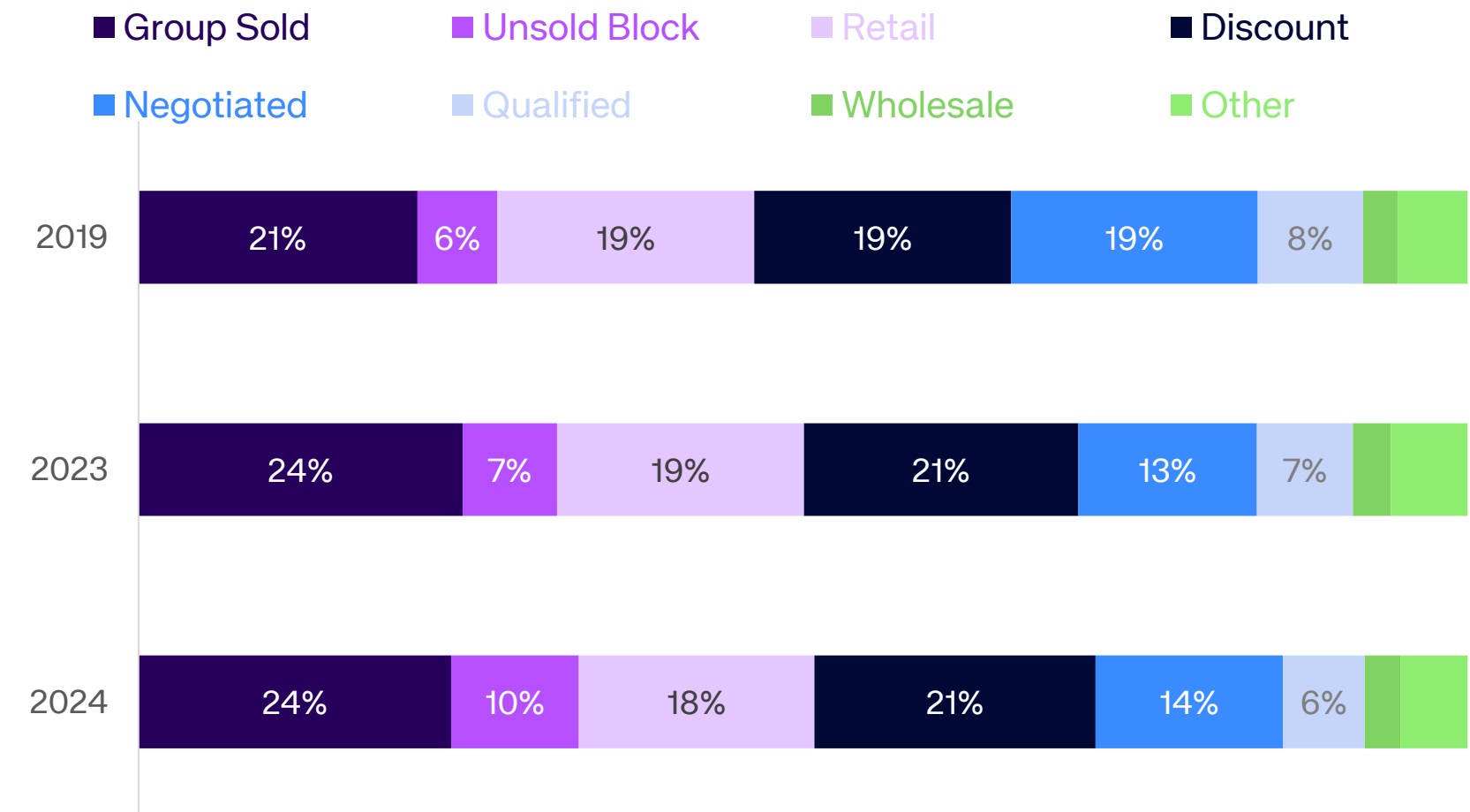
- Vancouver and Quebec show strong occupancies moving into December.



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Year-on-Year Segmentation | Canada

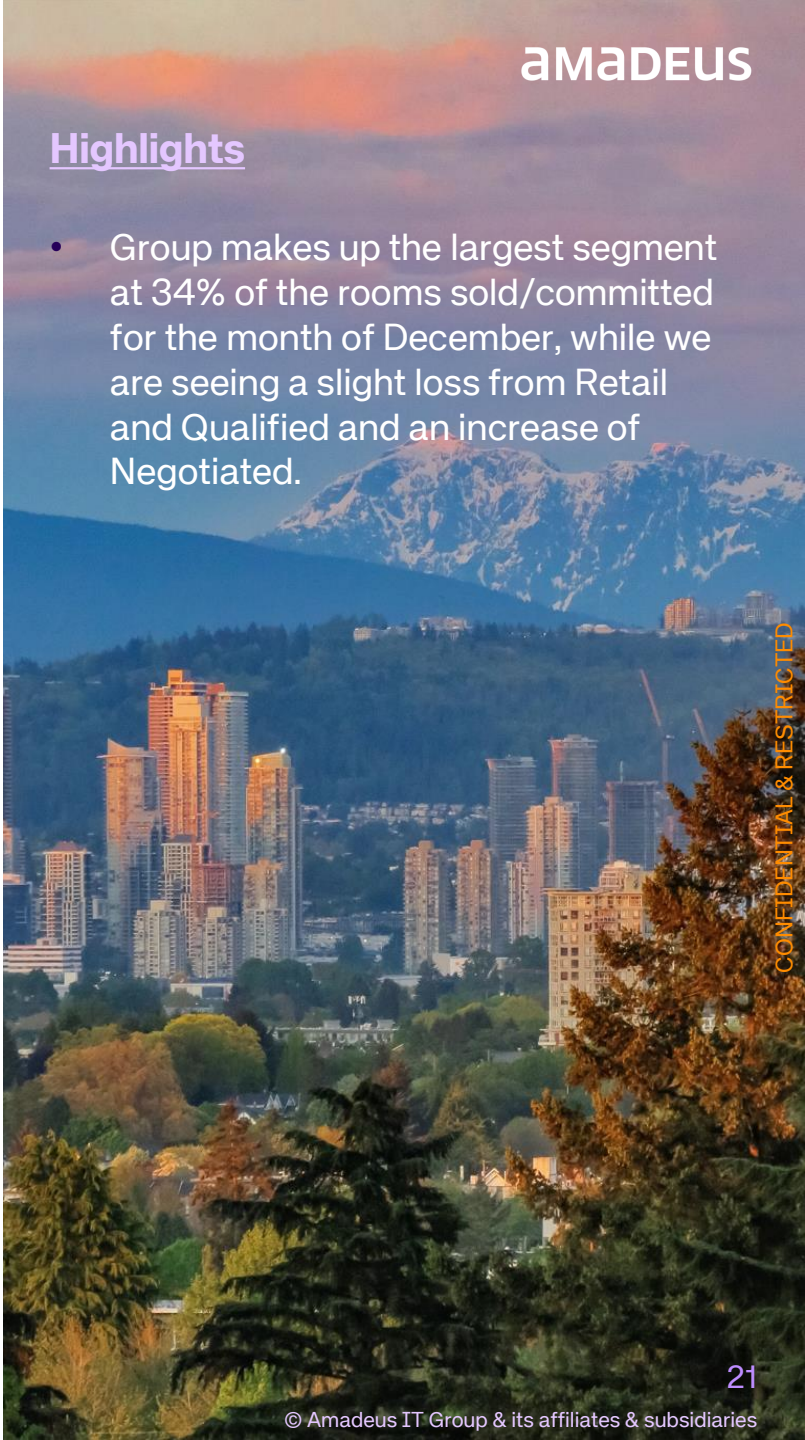
On-the-books market segmentation mix for December 2024 vs. last year and 2019.



Note that the hospitality insights included are based on the current database of properties their insights as of 22 November 2024. Therefore, the insights for November represent a change compared to the data report in previous years

Highlights

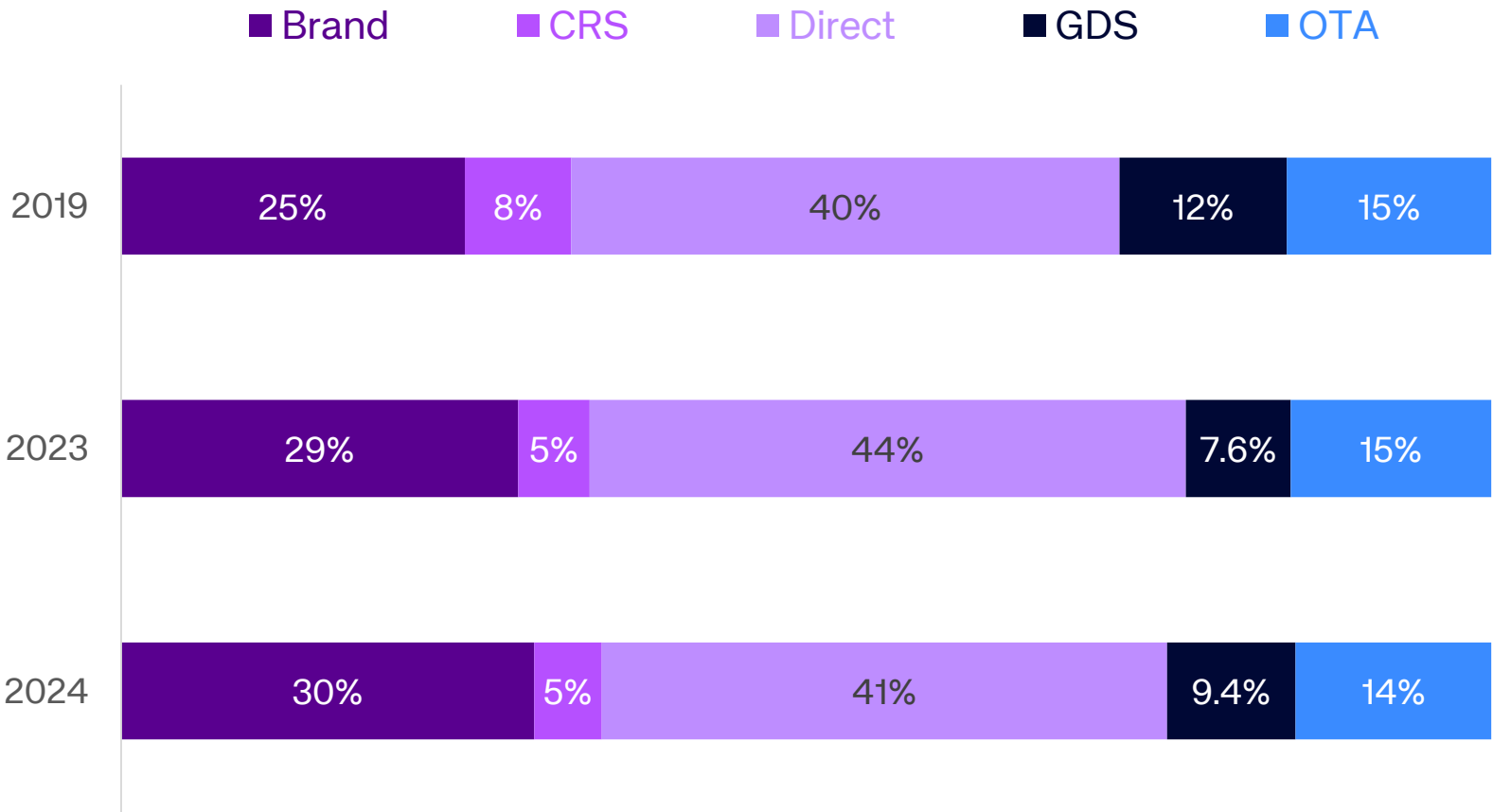
- Group makes up the largest segment at 34% of the rooms sold/committed for the month of December, while we are seeing a slight loss from Retail and Qualified and an increase of Negotiated.



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Hotel Channel Mix | Canada

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



Note that the hospitality insights included are based on the current database of properties their insights as of 22 November 2024. Therefore, the insights for November represent a change compared to the data report in previous years

Highlights

- Brand.com and GDS gained in contribution due to a shift from Direct bookings.



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Greater China



Top 10 Cities for Airline Inbound YoY | Greater China

Top international airline searches into China for December 2024 and last year.

Searched Year on Year			
	2023		2024
1	Tokyo, Japan	↘	Bangkok, Thailand
2	Seoul, Korea (ROK)	=	Seoul, Korea (ROK)
3	Hong Kong, Hong Kong SAR	↘	Tokyo, Japan
4	Singapore, Singapore	=	Singapore, Singapore
5	Sydney, Australia	=	Sydney, Australia
6	Bangkok, Thailand	↗	London, UK
7	London, UK	↗	Kuala Lumpur, Malaysia
8	Osaka, Japan	↘	Hong Kong, Hong Kong SAR
9	Melbourne, Australia	↘	Osaka, Japan
10	New York City, USA	↓	Melbourne, Australia

Source: Amadeus Navigator360™ data as of 20 November, 2024

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

- Similarly to last month, searches from Bangkok are significantly higher year-on-year.
- Into December, Hong Kong is seeing a significant drop in searched against last year.



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Top 10 Cities for Airline Inbound | Greater China

Top airline searches vs. bookings for December 2024.

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

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

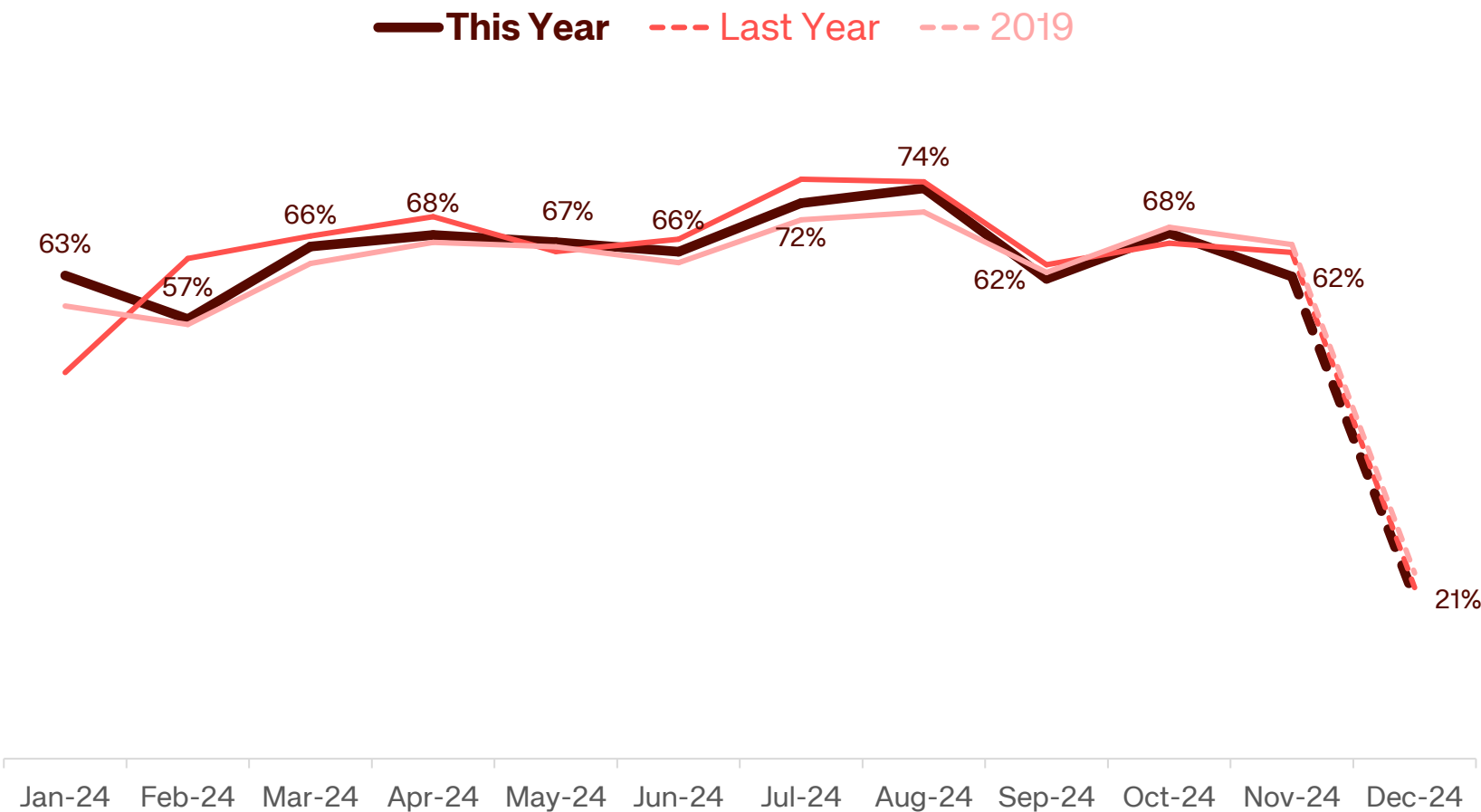
Highlights

- Most searches and bookings into China come regionally and from Asia Pacific markets
- Only London and NYC are exceptions among top 10 searching and booking Greater China respectively.

Source: Amadeus Navigator360™ data as of 20 November, 2024

2024 Hotel Occupancy | Greater China

On-the-books by month compared to same time last year and 2019.



Note that the hospitality insights included are based on the current database of properties their insights as of 22 November 2024. Therefore, the insights for November represent a change compared to the data report in previous years

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Source: Amadeus Demand360® data as of 22 November, 2024.

Highlights

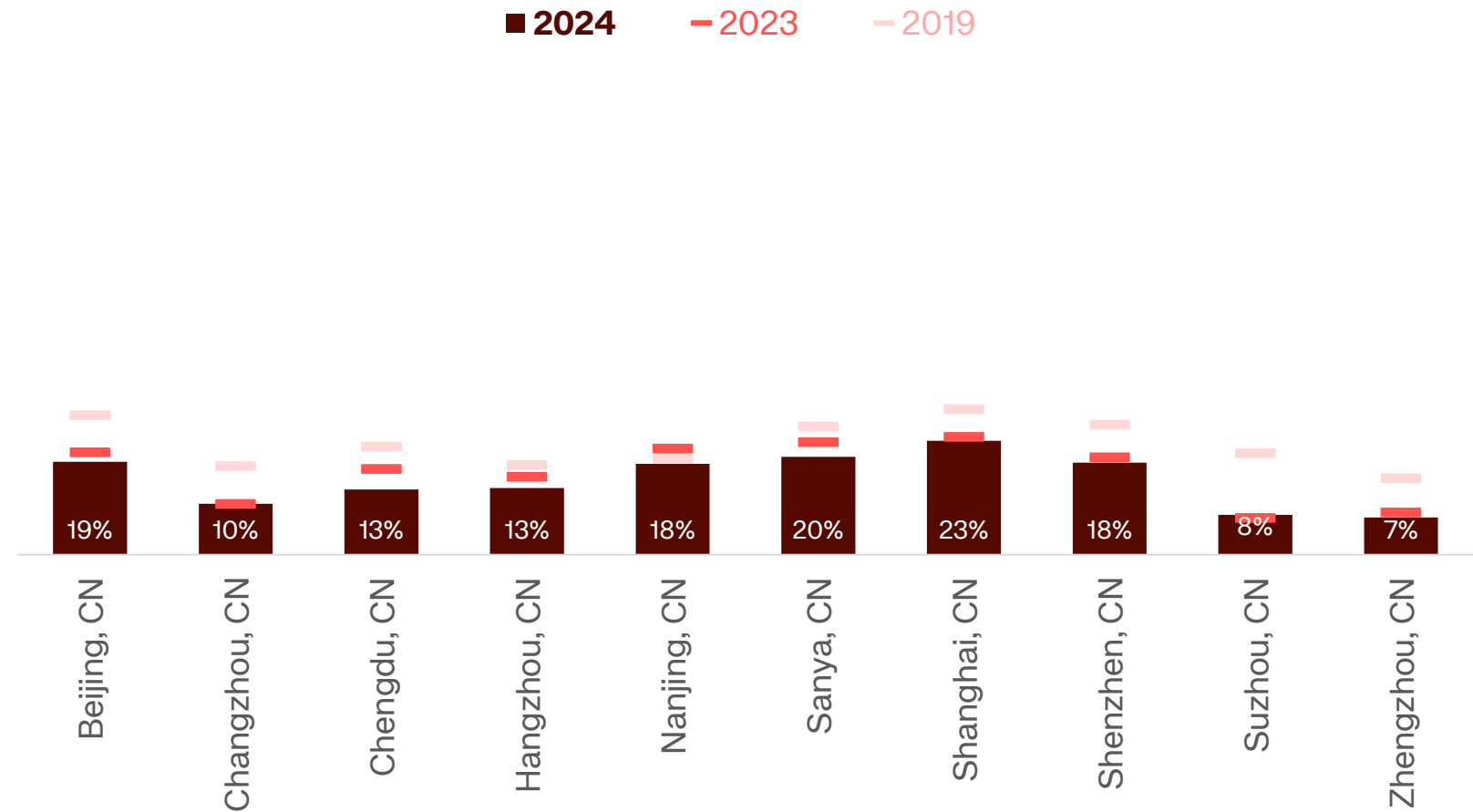
- October closed as one of the busiest months in the year with occupancy ahead of last year.
- November, on the other hand, is pacing under last year and 2019. December is aligned with both 2023 and 2019.



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Occupancy & Pace by Market | Greater China

On-the-books total occupancy by market for December 2024 vs. 2023 and 2019.



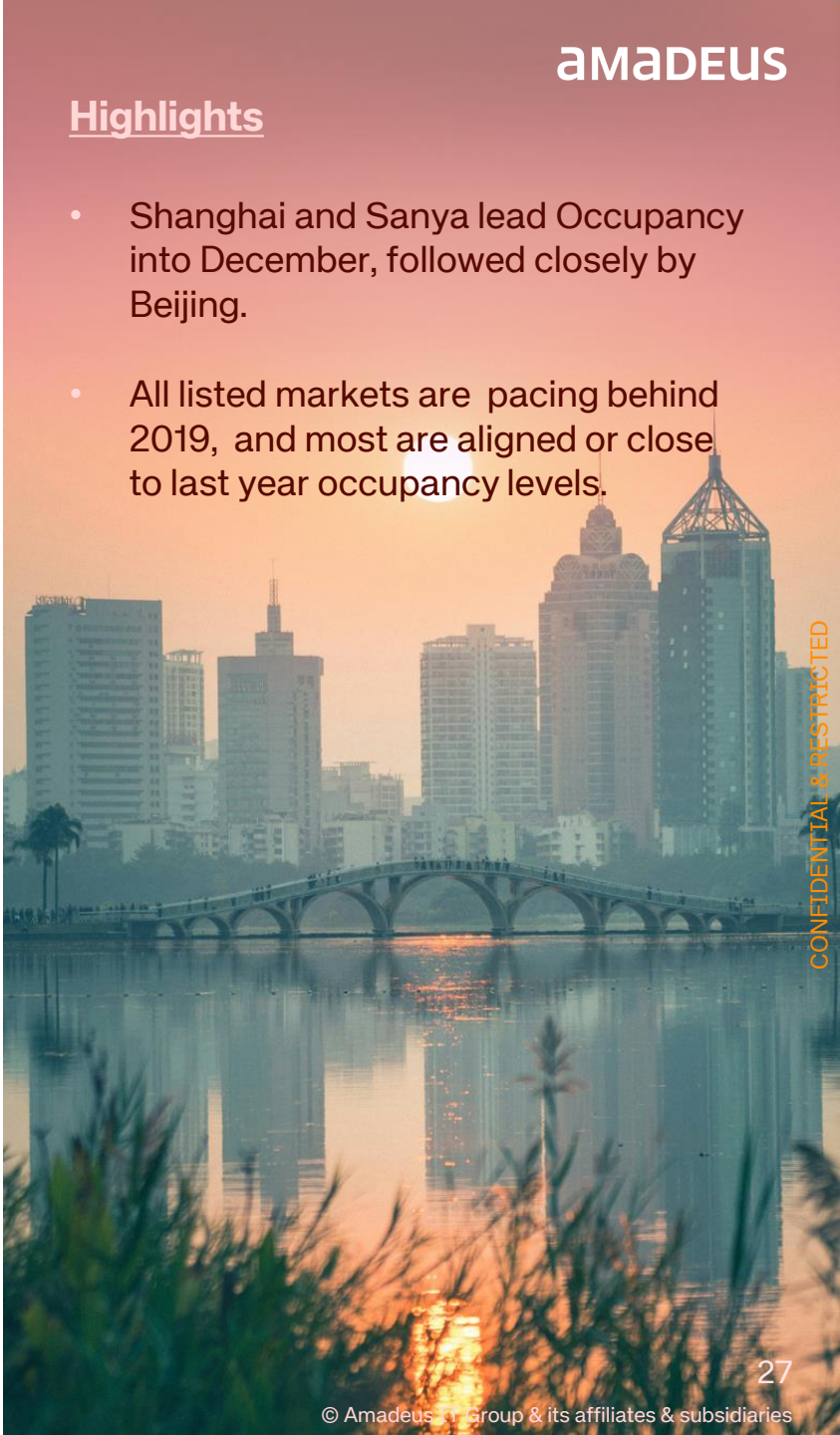
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Highlights

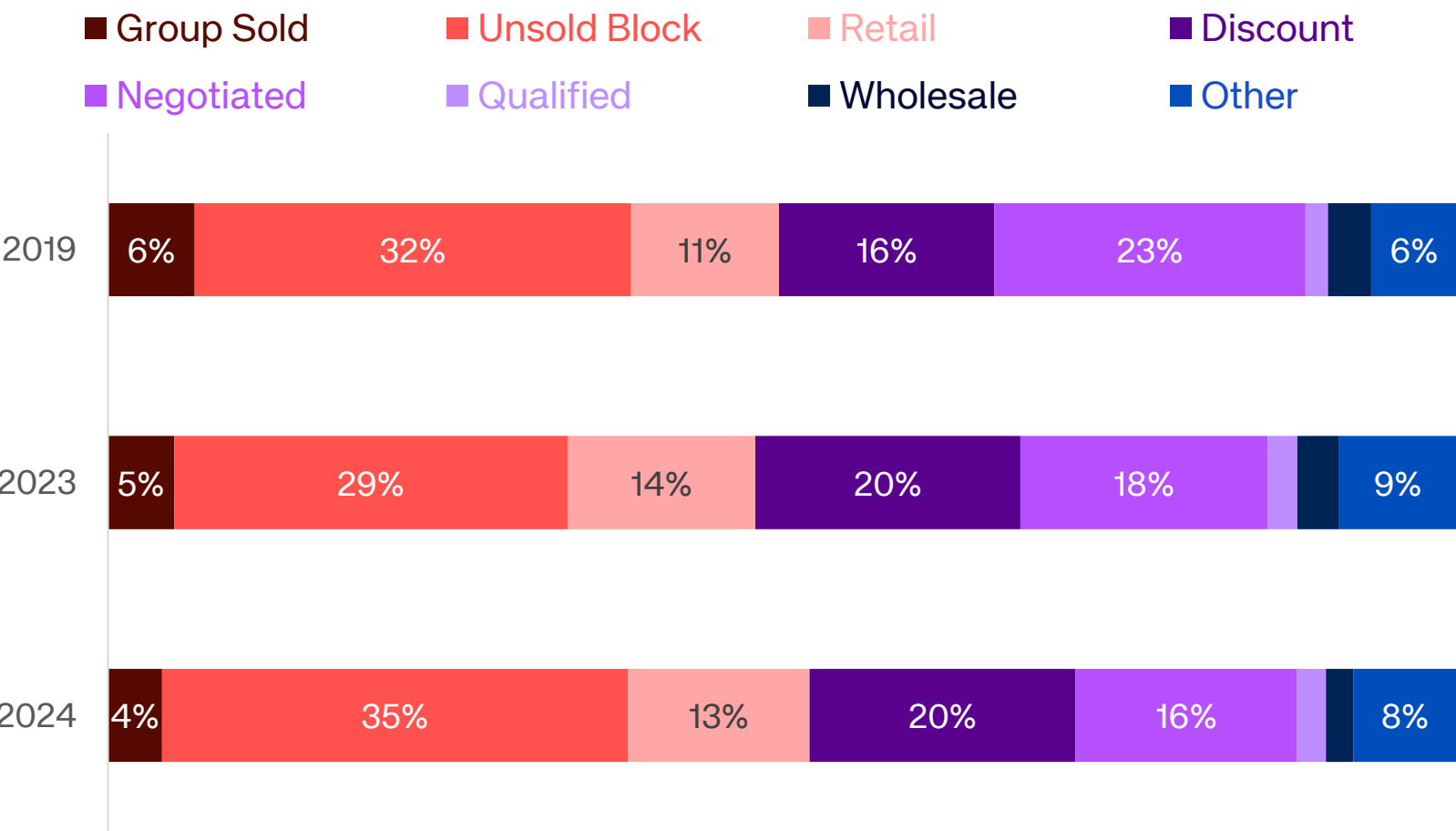
- Shanghai and Sanya lead Occupancy into December, followed closely by Beijing.
- All listed markets are pacing behind 2019, and most are aligned or close to last year occupancy levels.



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Year-on-Year Segmentation | Greater China

On-the-books market segmentation mix for Dec. 2024 vs. last year and 2019.



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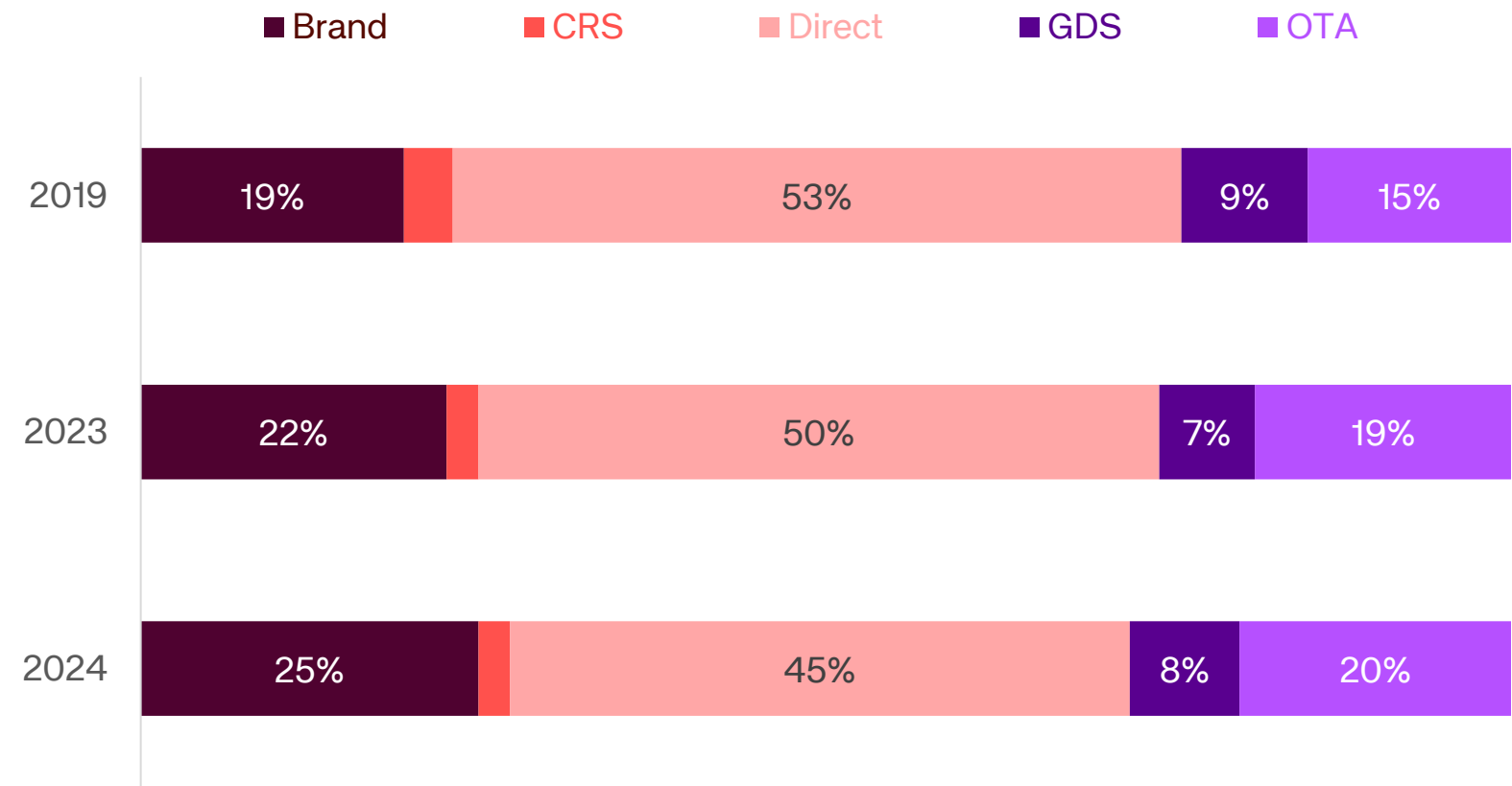
Highlights

- Into December, Group + Unsold Block are growing faster not only than last year, but also than 2019, with confirmations happening well within the month of arrival.
- Transient is seeing a shift to group business.



Year-on-Year Channel Mix | Greater China

On-the-books distribution channel mix for December 2024 vs. last year and 2019.



Note that the hospitality insights included are based on the current database of properties their insights as of 22 November 2024. Therefore, the insights for November represent a change compared to the data report in previous years

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Source: Amadeus Demand360® data as of 22 November, 2024.

Highlights

- Brand is the fastest growing channel, followed by OTAs, mainly shifted from Direct business.
- GDS contribution has also increased for December yet is slightly behind 2019 levels



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Rest of Asia Pacific



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

Top international airline searches into Asia for December 2024 and last year.

Searched Year on Year			
	2023		2024
1	London, UK	=	London, UK
2	Seoul, Korea (ROK)	=	Seoul, Korea (ROK)
3	US: Others	=	US: Others
4	Dubai, UAE	↘	Toronto, Canada
5	Singapore, Singapore	↘	Tokyo, Japan
6	Moscow, Russian Federation	↓	New York City, USA
7	Toronto, Canada	↗	Frankfurt am Main, Germany
8	New York City, USA	↗	Sydney, Australia
9	Paris, France	↓	Singapore, Singapore
10	Tokyo, Japan	↗	Dubai, UAE

LEGEND

↘
Position dropped from searched to booked

↗
Position improved from searched to booked

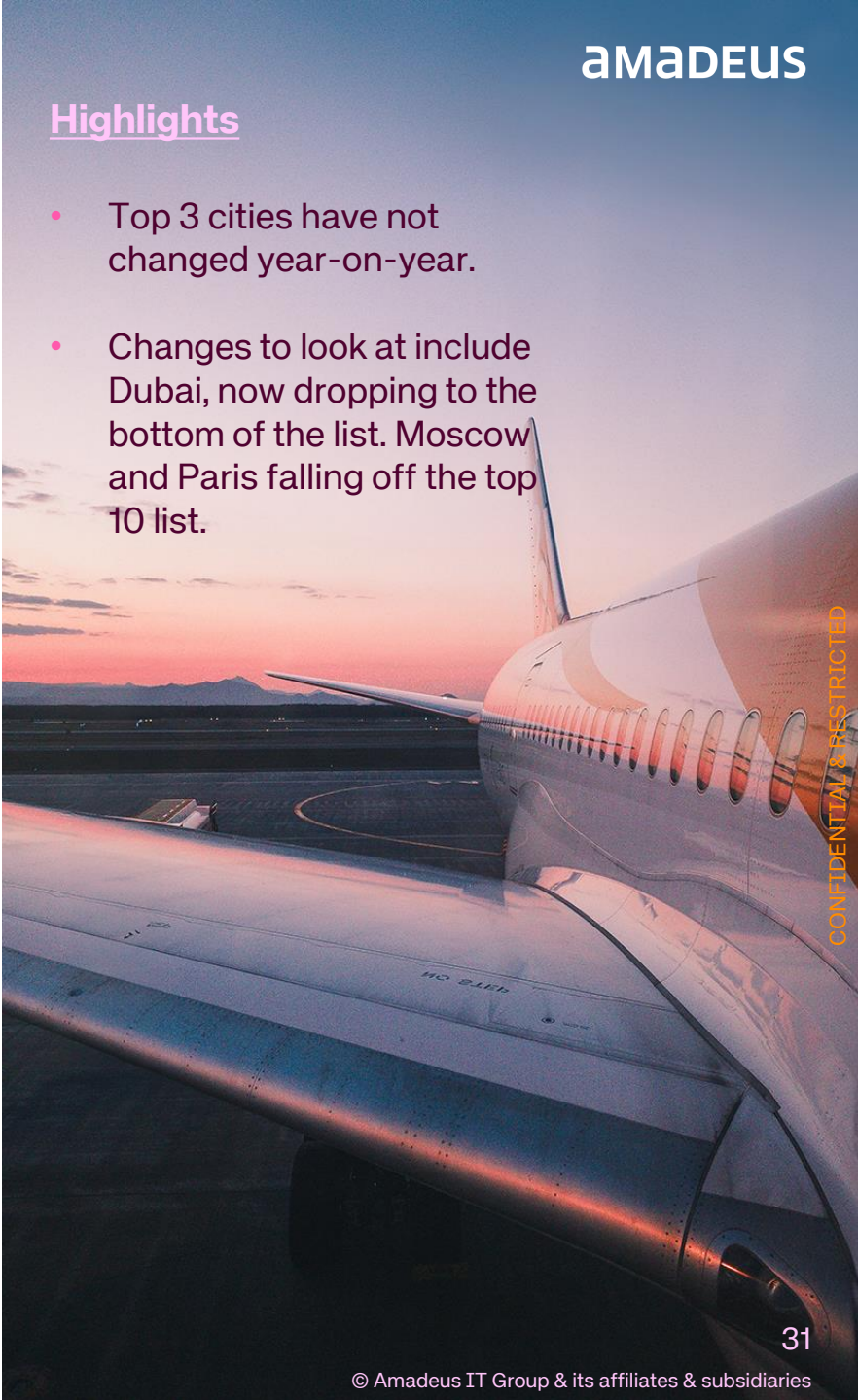
=
Same position in top 10 searched & booked

↓
Not one of top 10 booked cities

Highlights

- Top 3 cities have not changed year-on-year.
- Changes to look at include Dubai, now dropping to the bottom of the list. Moscow and Paris falling off the top 10 list.

Source: Amadeus Navigator360™ data as of 20 November, 2024



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Top 10 Cities for Airline Inbound | Rest of Asia Pacific

Top airline searches vs. bookings for December 2024.

	Searched		Booked
1	London, UK	↘	Seoul, Korea (ROK)
2	Seoul, Korea (ROK)	↗	London, UK
3	US: Others	↘	Tokyo, Japan
4	Toronto, Canada	↓	Taipei, Chinese Taipei
5	Tokyo, Japan	↗	Frankfurt am Main, Germany
6	New York City, USA	↘	Busan, Korea (ROK)
7	Frankfurt am Main, Germany	↗	Sydney, Australia
8	Sydney, Australia	↗	New York City, USA
9	Singapore, Singapore	↓	Paris, France
10	Dubai, UAE	↓	US: Others

LEGEND

↘
Position dropped from searched to booked

↗
Position improved from searched to booked

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Same position in top 10 searched & booked

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Not one of top 10 booked cities

Highlights

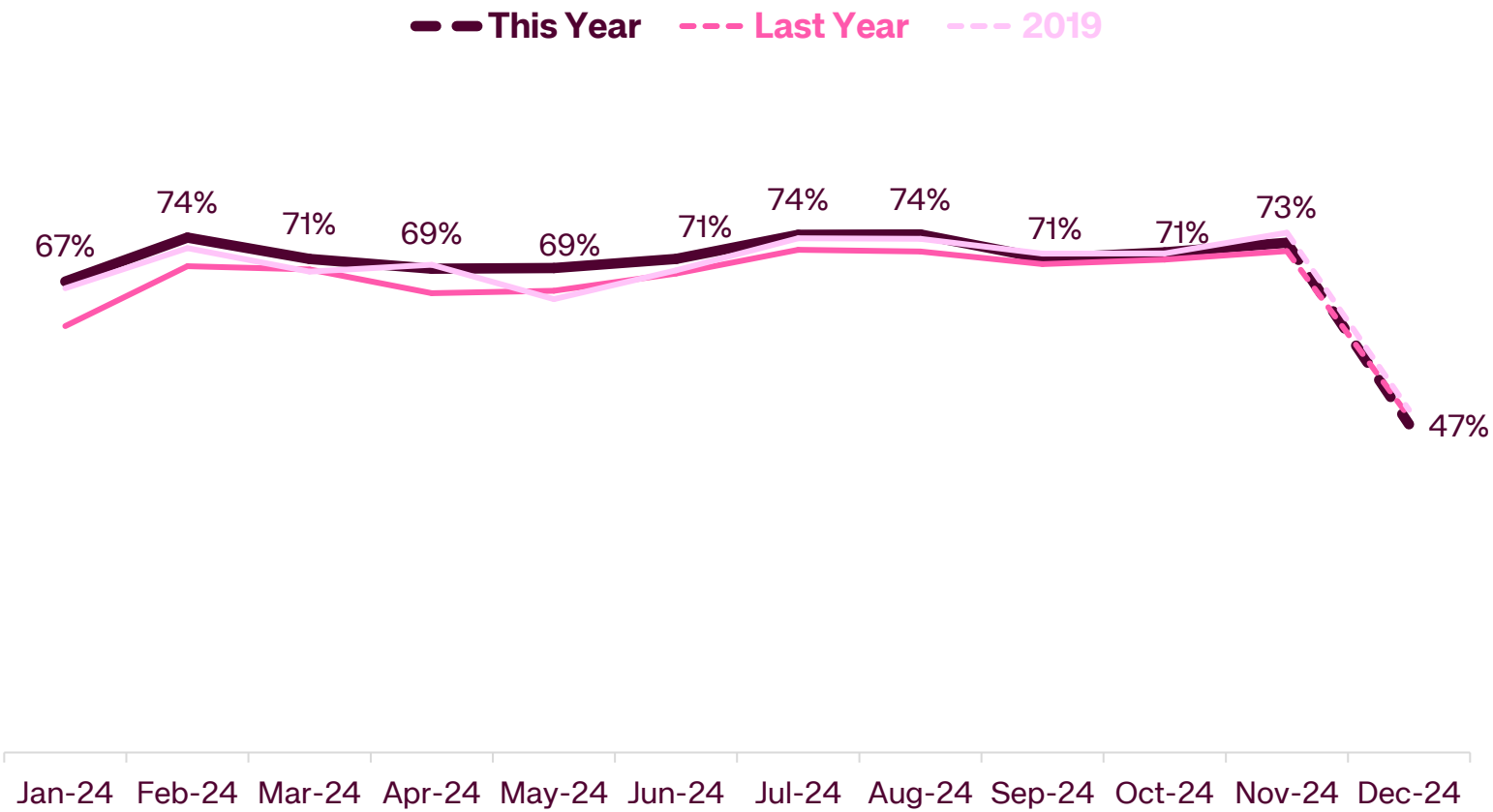
- The top two source markets searching and traveling into the region in December 2024 will come from London and Seoul.
- Toronto and Dubai drop from top 10 searches when looking at booked.



Source: Amadeus Navigator360™ data as of 20 November, 2024

2024 Hotel Occupancy | Rest of Asia Pacific

On-the-books by month compared to same time last year and 2019.



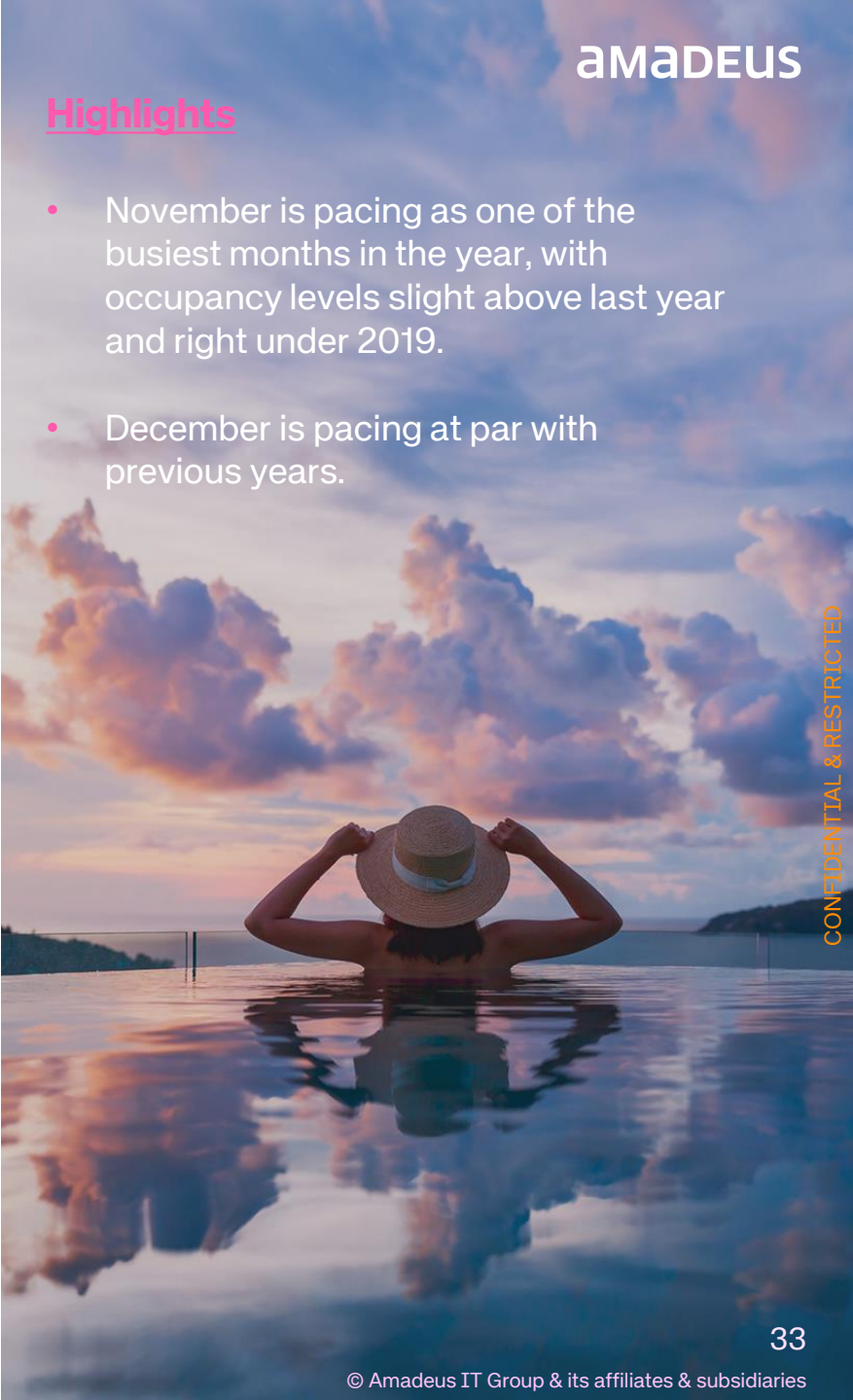
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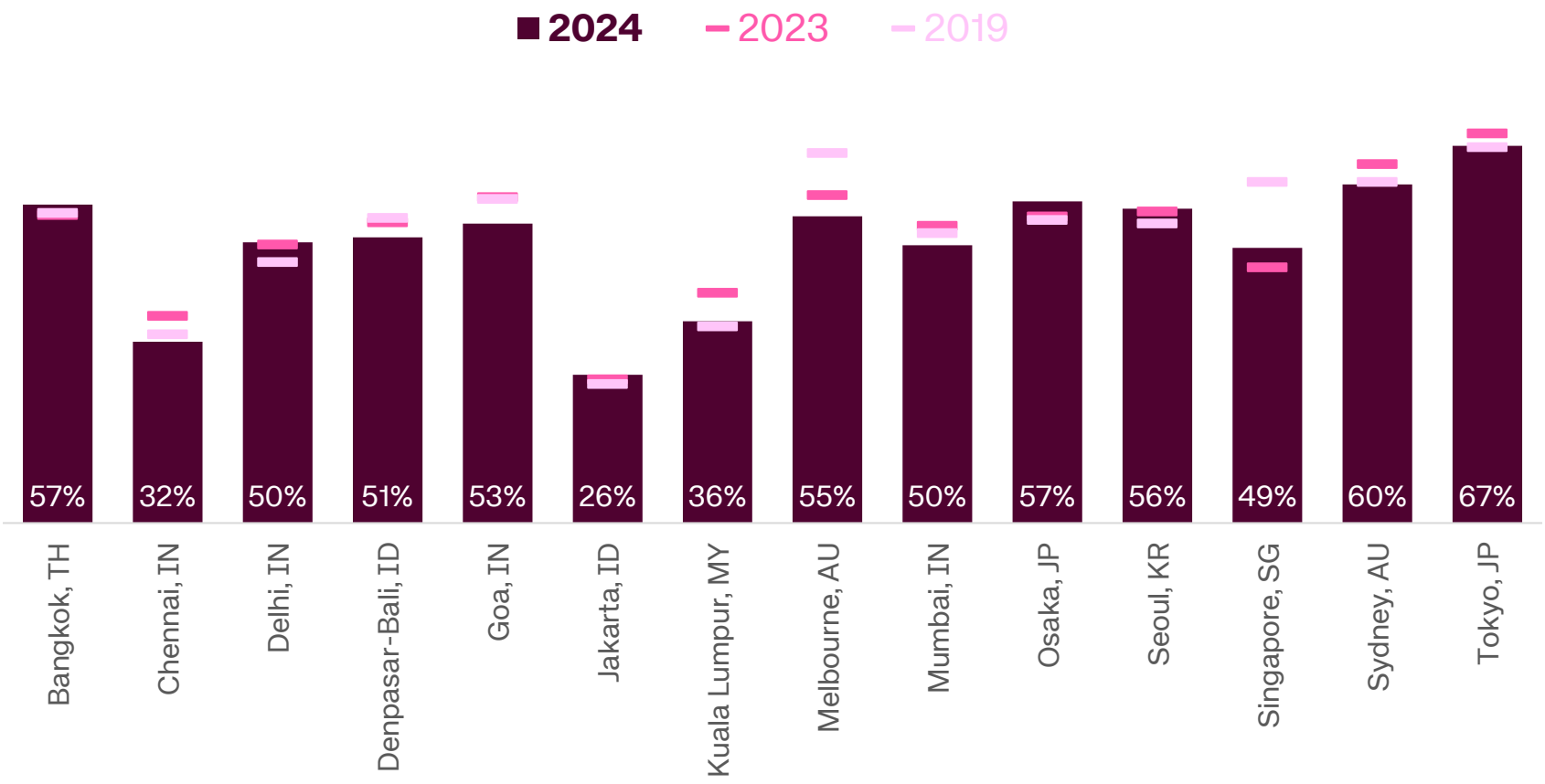
- November is pacing as one of the busiest months in the year, with occupancy levels slight above last year and right under 2019.
- December is pacing at par with previous years.



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Occupancy & Pace by Market | Rest of Asia Pacific

On-the-books market segmentation mix for December 2024 vs. last year and 2019.



Highlights

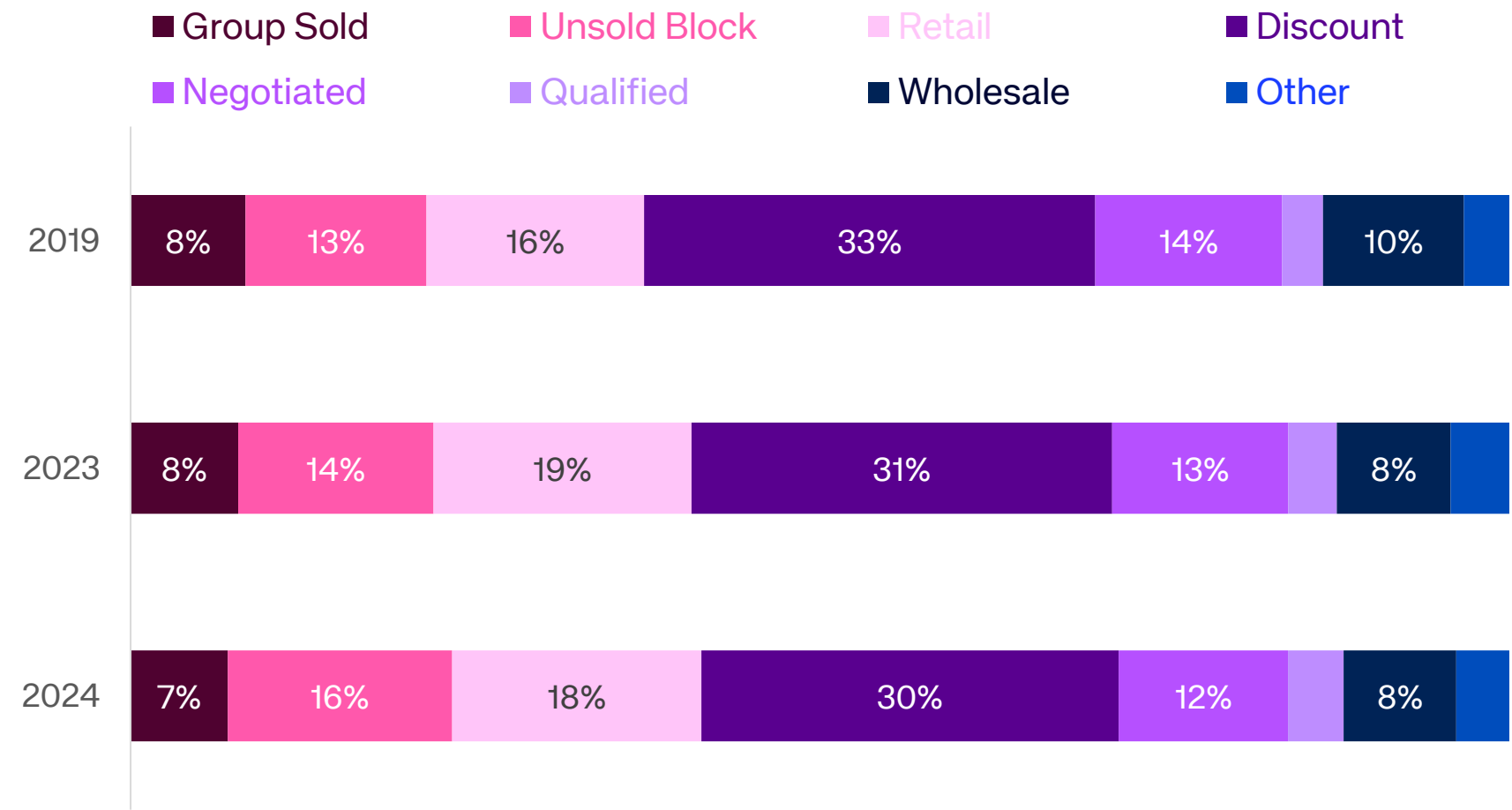
- Tokyo continues leading occupancy levels in the region with occupancy levels slightly behind last year and aligned with 2019.
- Osaka, Jakarta, Bangkok and Delhi are the only markets with occupancy levels higher in 2024 than both 2023 and 2019.

Note that the hospitality insights included are based on the current database of properties their insights as of 22 November 2024. Therefore, the insights for November represent a change compared to the data report in previous years



Year-on-Year Segmentation | Rest of Asia

On-the-books market segmentation mix for December 2024 vs. last year and 2019.



Note that the hospitality insights included are based on the current database of properties their insights as of 22 November 2024. Therefore, the insights for November represent a change compared to the data report in previous years

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Source: Amadeus Demand360® data as of 22 November, 2024.

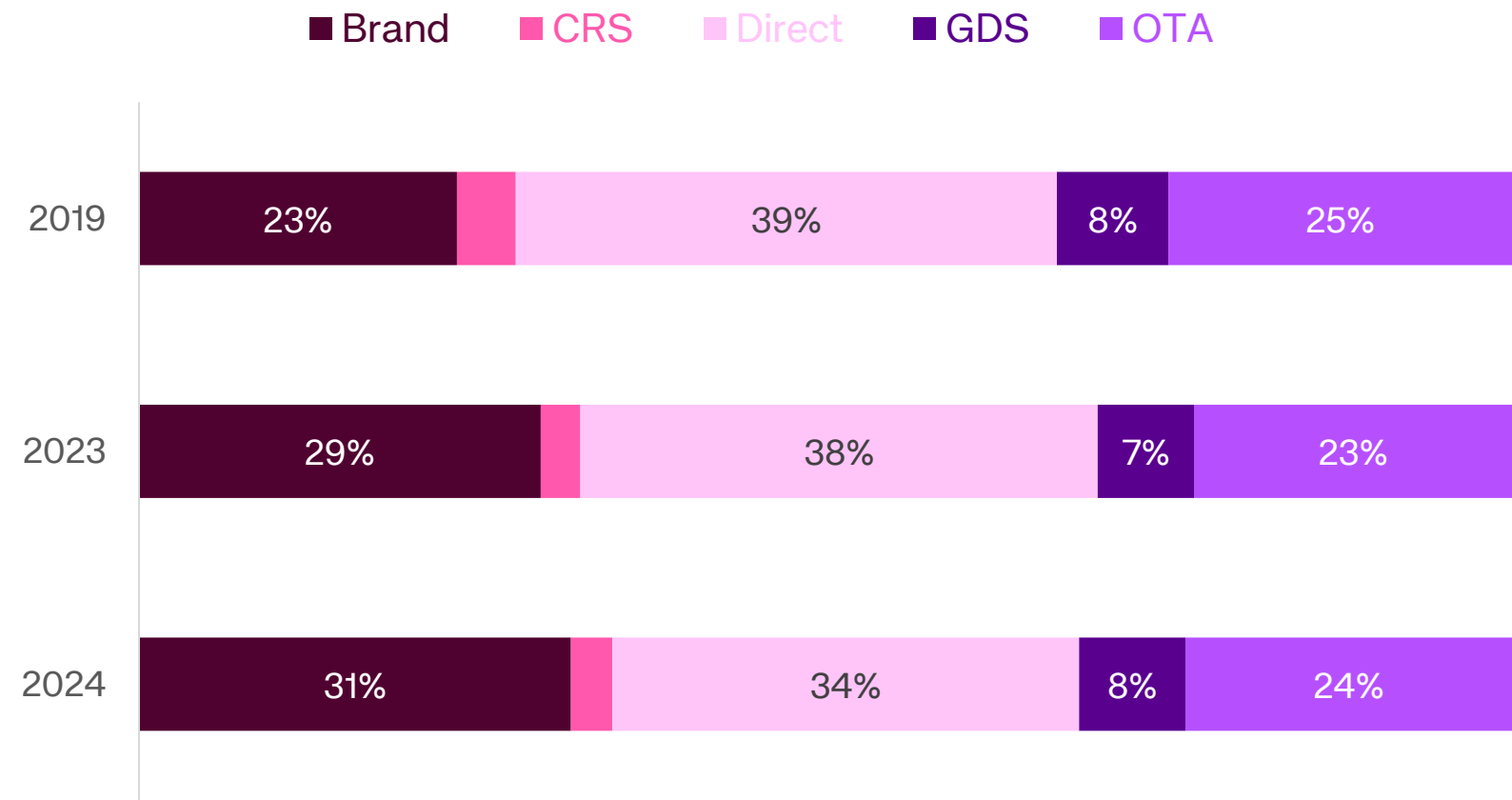
Highlights

- Group (Sold + Unsold Block) contribution continues growing, month-on-month and year-on-year, especially Unsold Block, indicating that groups are confirming closer to arrival.
- Transient is YoY shifting their business to groups with smaller figures in almost all segments.



Year-on-Year Channel Mix | Rest of Asia

On-the-books market distribution channel mix for December 2024 vs. last year and 2019.



Note that the hospitality insights included are based on the current database of properties their insights as of 22 November 2024. Therefore, the insights for November represent a change compared to the data report in previous years

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Source: Amadeus Demand360® data as of 22 November, 2024.

Highlights

- Brand continues expanding month-on-month and year-on-year. OTAs are slightly ahead of last year but remain below 2019.
- Direct channel is seeing a shift of their business to other channels, especially against last year.



Europe

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Top 10 Cities for Airline Inbound YoY | Europe

Top international airline searches into Europe for December 2024 and last year.

Searched Year-on-Year

	2023		2024
1	London, UK	=	London, UK
2	Paris, France	↘	US: Others
3	US: Others	↗	Paris, France
4	Milan, Italy	↘	New York City, USA
5	New York City, USA	↗	Milan, Italy
6	Madrid, Spain	↘	Sao Paulo, Brazil
7	Rome, Italy	↘	Madrid, Spain
8	Amsterdam, Netherlands	↘	Rome, Italy
9	Barcelona, Spain	↘	Amsterdam, Netherlands
10	Frankfurt am Main, Germany	↓	Barcelona, Spain

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 remains on top of searching cities year-on-year.
- With few exceptions (US Cities, Sao Paulo), most searches remain within Europe for both years.



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Source: Amadeus Navigator360™ data as of 20 November, 2024

Top 10 Cities for Airline Inbound | Europe

Top airline searches vs bookings in December 2024.

	Searched		Booked
1	London, UK	=	London, UK
2	US: Others	↘	New York City, USA
3	Paris, France	↘	US: Others
4	New York City, USA	↗	Tel Aviv, Israel
5	Milan, Italy	↓	Paris, France
6	Sao Paulo, Brazil	↓	Madrid, Spain
7	Madrid, Spain	↗	Frankfurt am Main, Germany
8	Rome, Italy	↓	Amsterdam, Netherlands
9	Amsterdam, Netherlands	↗	Copenhagen, Denmark
10	Barcelona, Spain	↓	Lisbon, Portugal

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 leads Searched and Booked into December.
- Tel Aviv, Frankfurt, Copenhagen and Lisbon are markets from the list of top 10 travelling cities that are not on the list of top 10 searched.

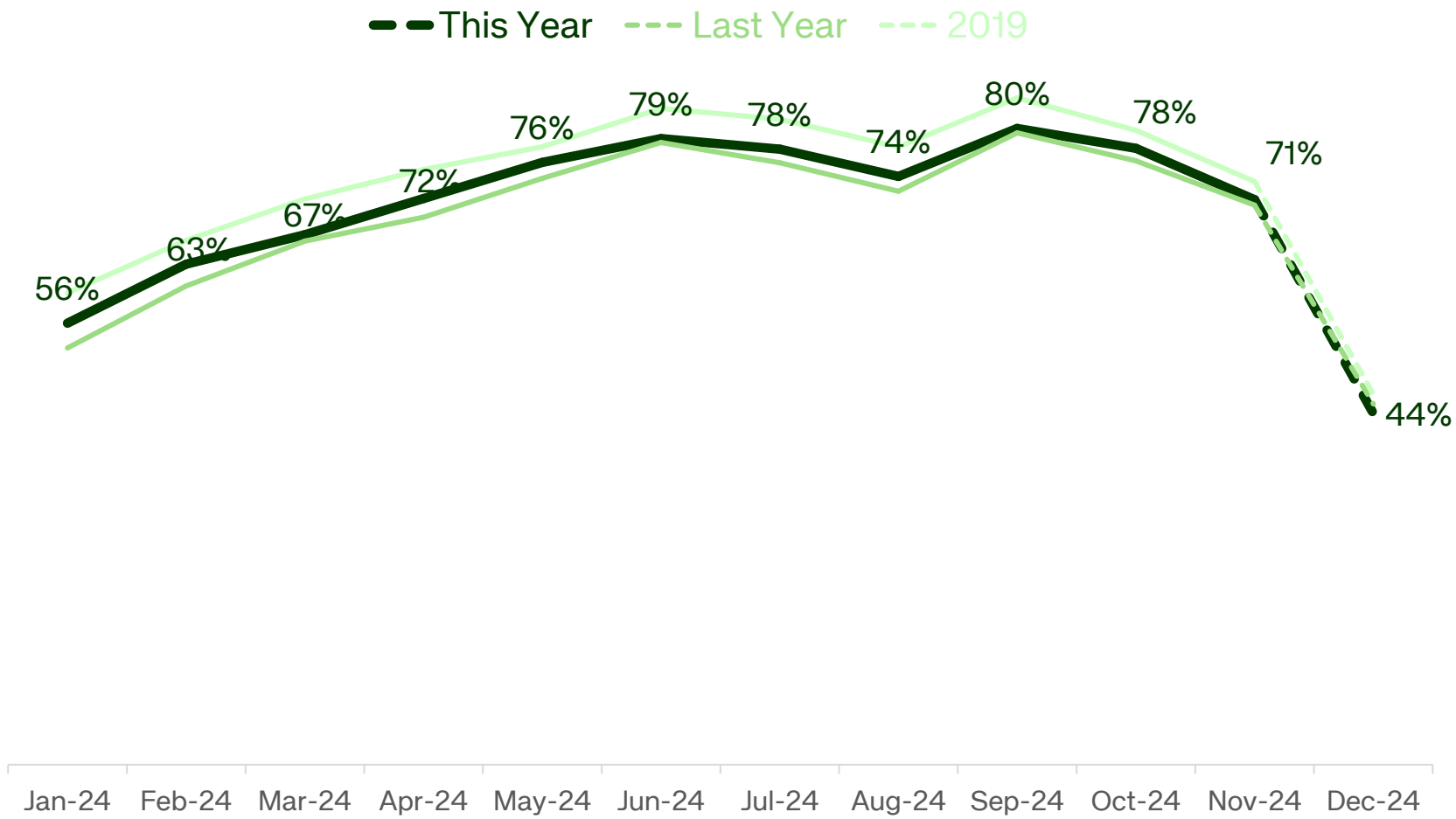
Source: Amadeus Navigator360™ data as of 20 November, 2024



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2024 Hotel Occupancy | Europe

On-the-books by month compared to same time last year and 2019.



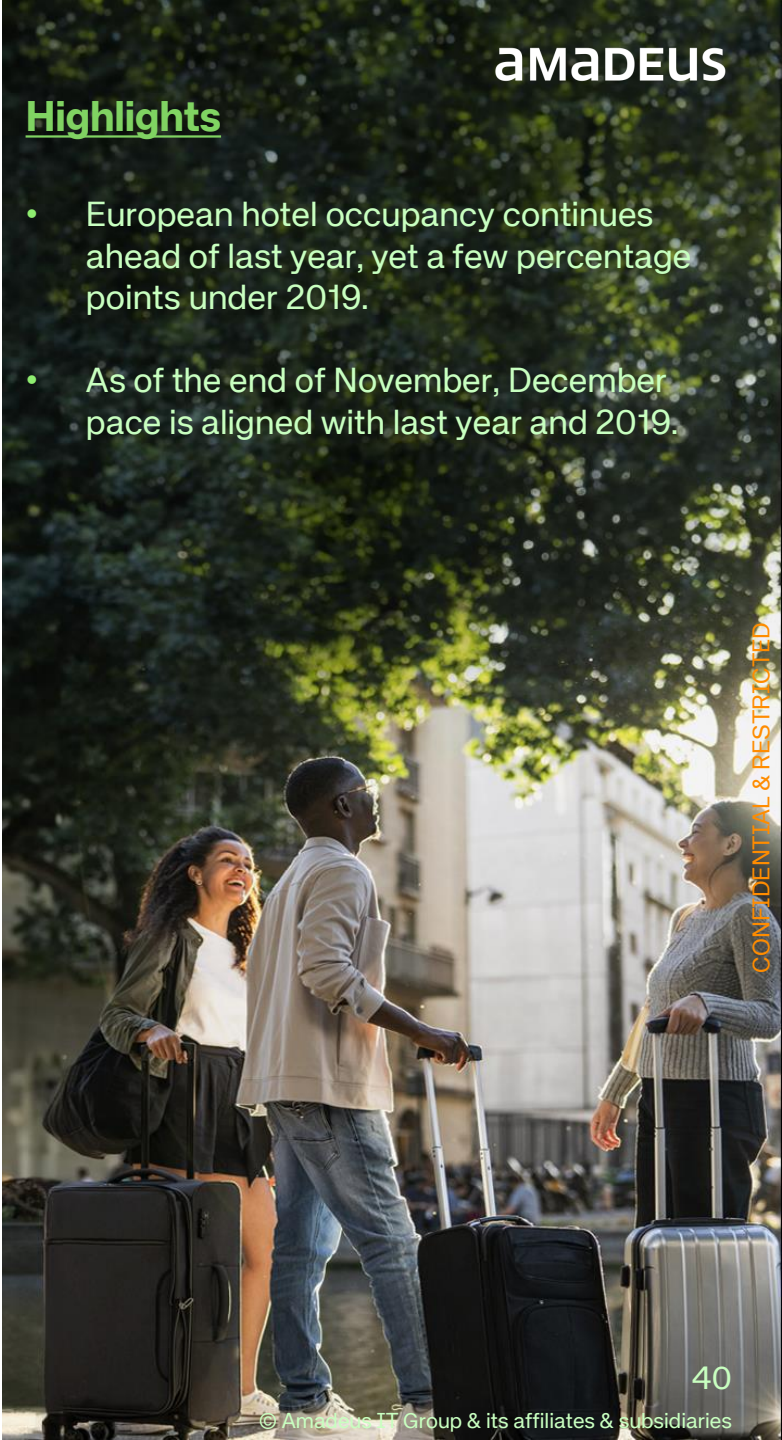
Note that the hospitality insights included are based on the current database of properties their insights as of 22 November 2024. Therefore, the insights for November represent a change compared to the data report in previous years

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Source: Amadeus Demand360® data as of 22 November, 2024.

Highlights

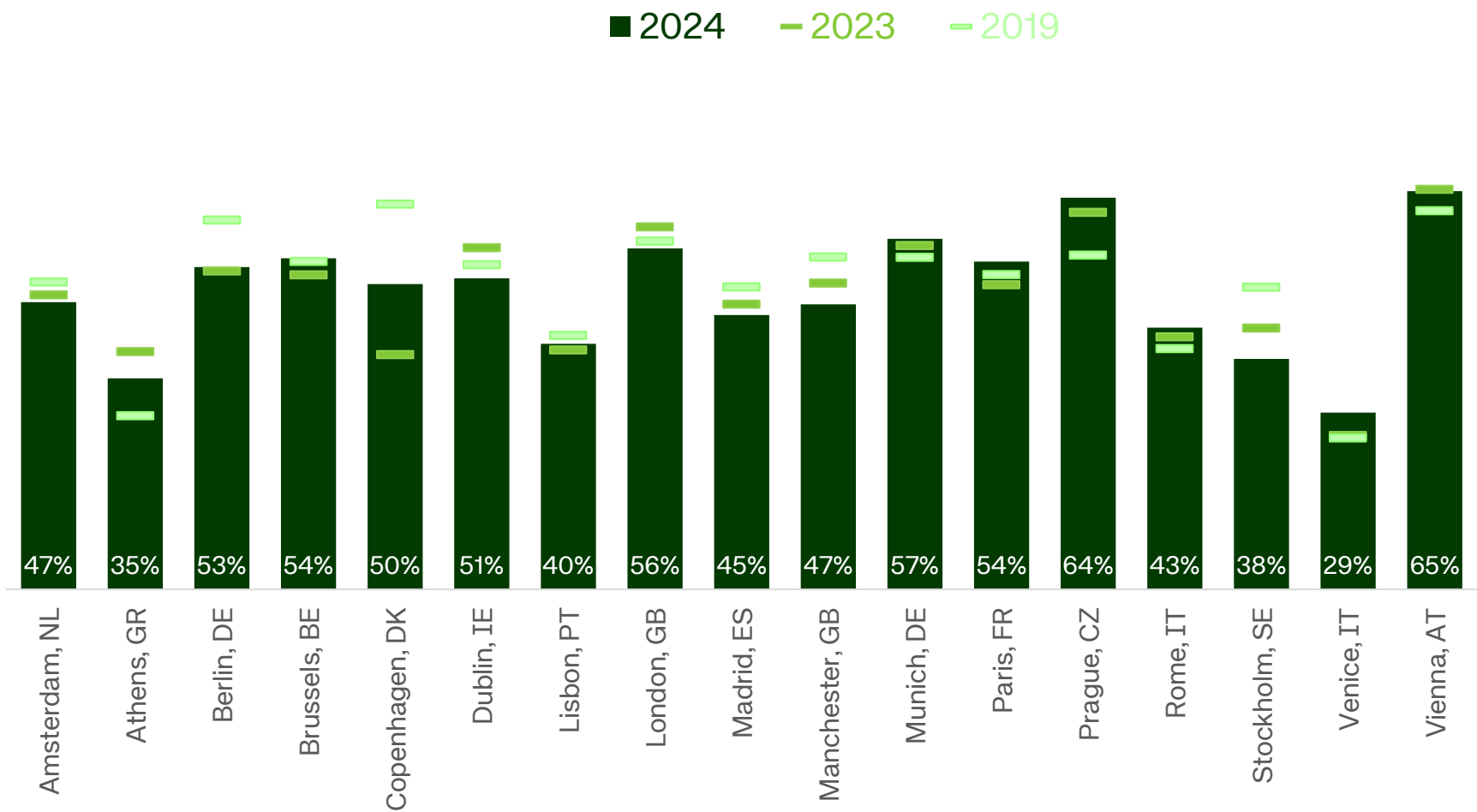
- European hotel occupancy continues ahead of last year, yet a few percentage points under 2019.
- As of the end of November, December pace is aligned with last year and 2019.



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Occupancy & Pace by Market | Europe

On-the-books total occupancy by market for December 2024 vs. last year and 2019.



Note that the hospitality insights included are based on the current database of properties their insights as of 22 November 2024. Therefore, the insights for November represent a change compared to the data report in previous years

Highlights

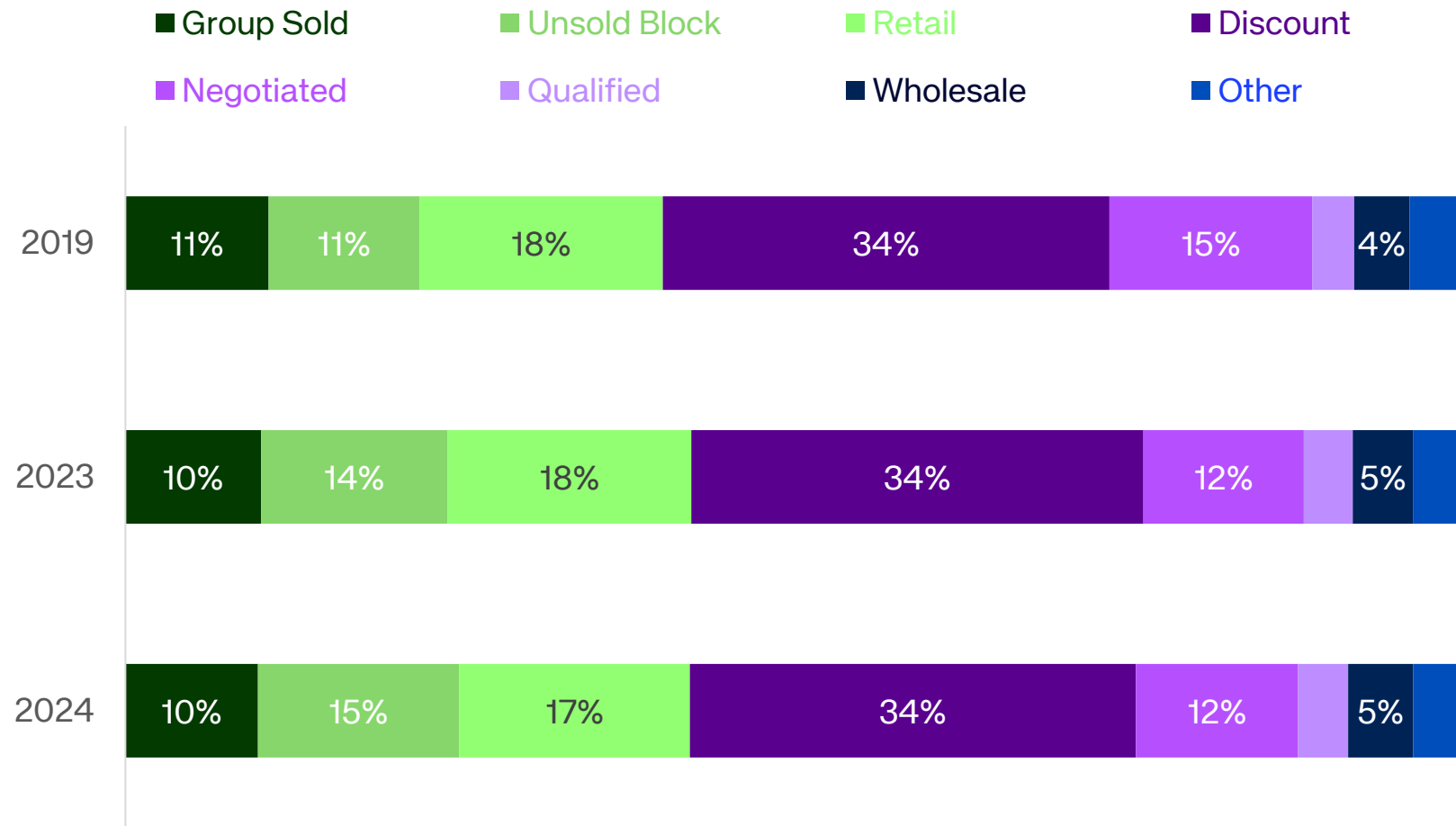
- Vienna is leading occupancy into December in the region, slightly behind last year and well ahead of 2019.
- Prague is the second busiest market and one of the few where occupancy in 2024 is pacing ahead of both last year and 2019.



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Year-on-Year Segmentation | Europe

On-the-books market segmentation mix for Dec. 2024 vs. last year & 2019.



Note that the hospitality insights included are based on the current database of properties their insights as of 22 November 2024. Therefore, the insights for November represent a change compared to the data report in previous years

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Source: Amadeus Demand360® data as of 22 November, 2024.

Highlights

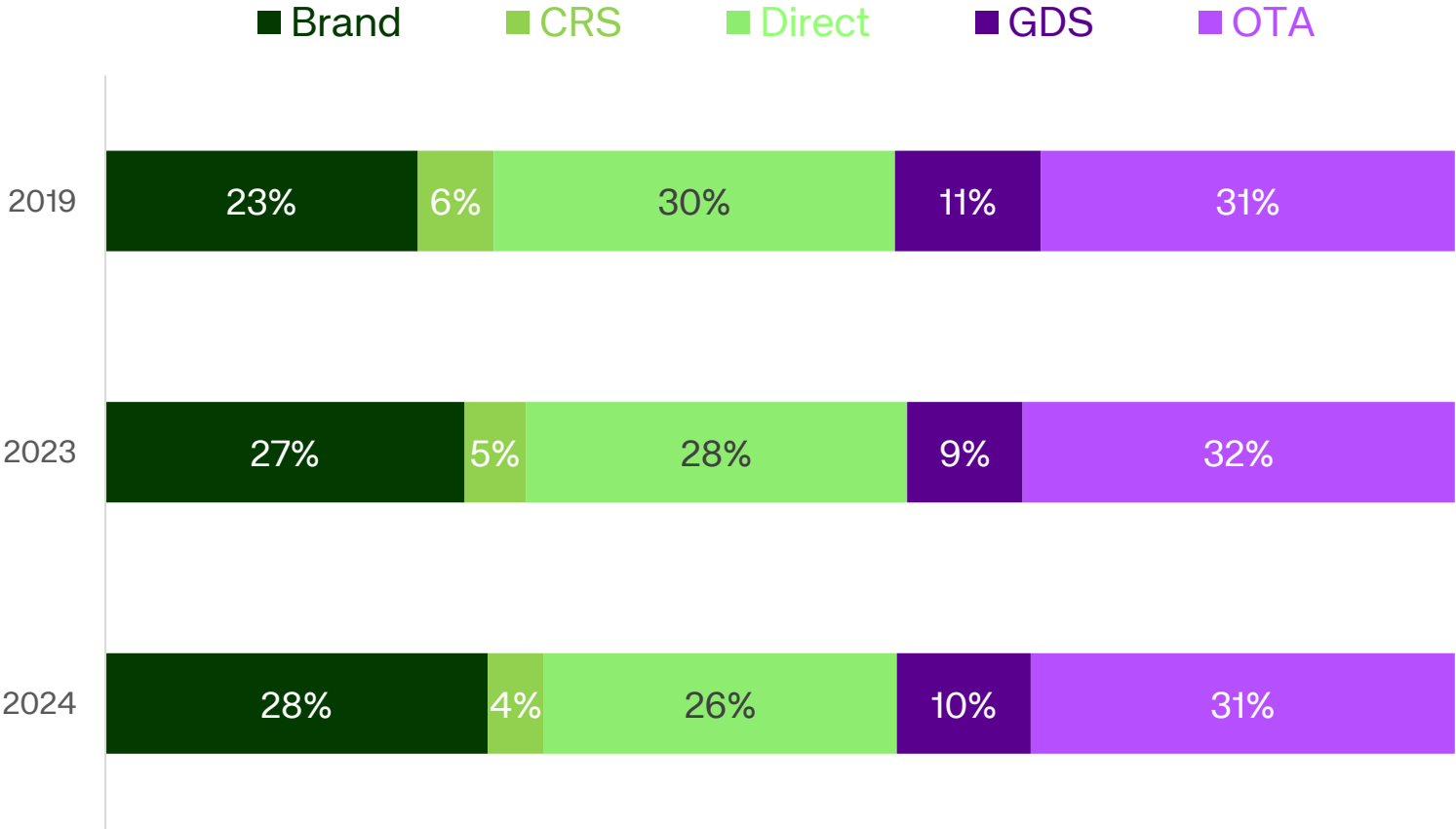
- Group Segment (Sold + Unsold) continues its growing pace against 2019 and is at a slightly higher level compared to last year, going into December.
- Within Transient, Discount remains the busiest segment with a small contraction of Retail business versus last year.



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Year-on-Year Channel Mix | Europe

On-the-books distribution channel mix for December 2024 vs. last year and 2019.



Note that the hospitality insights included are based on the current database of properties their insights as of 22 November 2024. Therefore, the insights for November represent a change compared to the data report in previous years

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Source: Amadeus Demand360® data as of 22 November, 2024.

Highlights

- Direct channels continue shifting business to Brand.com.
- Into December, GDS are showing a slight increase, to the detriment of OTAs.



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Middle East Africa



Top 10 Cities for Airline Inbound YoY | Middle East & Africa

Top international airline searches into MEA for December 2024 and last year.

Searches Year-over-Year			
	2023		2024
1	London, UK	=	London, UK
2	Paris, France	=	Paris, France
3	Moscow, Russian Federation	↓	US: Others
4	US: Others	↗	Dubai, UAE
5	Frankfurt am Main, Germany	=	Frankfurt am Main, Germany
6	Dubai, UAE	↗	New York City, USA
7	New York City, USA	↗	Milan, Italy
8	Duesseldorf, Germany	=	Duesseldorf, Germany
9	Milan, Italy	↗	IN: Others
10	Amsterdam, Netherlands	↓	Cairo, Egypt

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 December 2024, London and Paris are ranked highest in air searches by origin city, as in 2023.
- Moscow and Amsterdam are both falling off the top 10 searches this year.

Source: Amadeus Navigator360™ data as of 20 November, 2024

Top 10 Cities for Airline Inbound | Middle East & Africa

Top airline searches vs. bookings for December 2024.

	Searched		Booked
1	London, UK	↘	Paris, France
2	Paris, France	↗	London, UK
3	US: Others	↓	Cairo, Egypt
4	Dubai, UAE	↘	Kuwait City, Kuwait
5	Frankfurt am Main, Germany	↘	Dubai, UAE
6	New York City, USA	↘	Riyadh, Saudi Arabia
7	Milan, Italy	↓	Frankfurt am Main, Germany
8	Duesseldorf, Germany	↓	Algiers, Algeria
9	IN: Others	↓	New York City, USA
10	Cairo, Egypt	↗	Doha, Qatar

Source: Amadeus Navigator360™ data as of 20 November, 2024

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

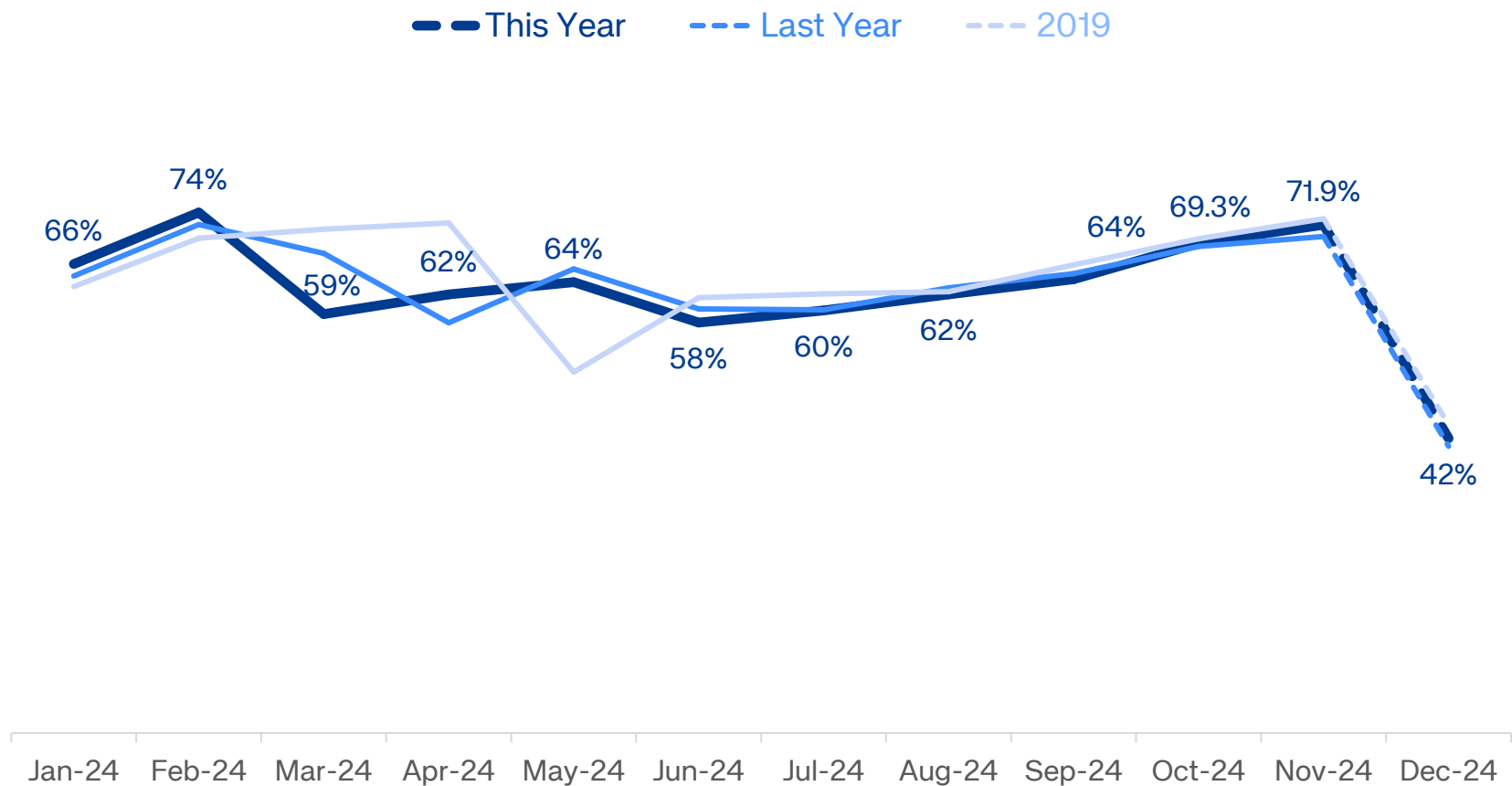
- London and Paris are the top two markets, both in terms of searches and bookings.
- Almost half of the top 10 searching cities fall from top 10 booking markets in December.



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2024 Hotel Occupancy | Middle East & Africa

On-the-books occupancy by month compared to same time last year and 2019.



Note that the hospitality insights included are based on the current database of properties their insights as of 22 November 2024. Therefore, the insights for November represent a change compared to the data report in previous years

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Source: Amadeus Demand360® data as of 22 November, 2024.

Highlights

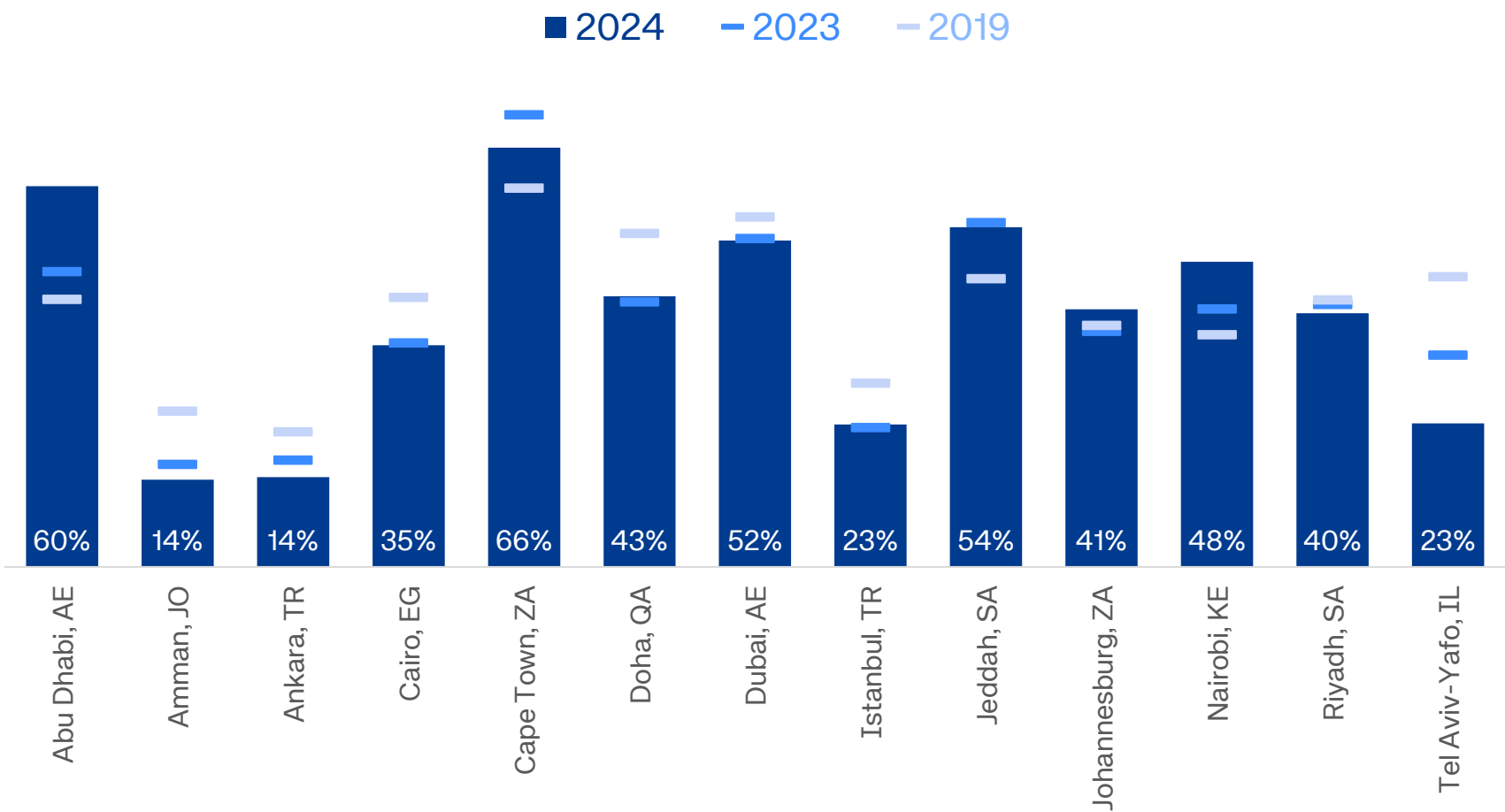
- August occupancy ended very close to last year's and 2019's levels, while October and December are under last year's.
- For December, occupancy in the region is ahead of last year. With the exception of December, all of Q4 is pacing below 2019.



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Occupancy & Pace by Market | Middle East & Africa

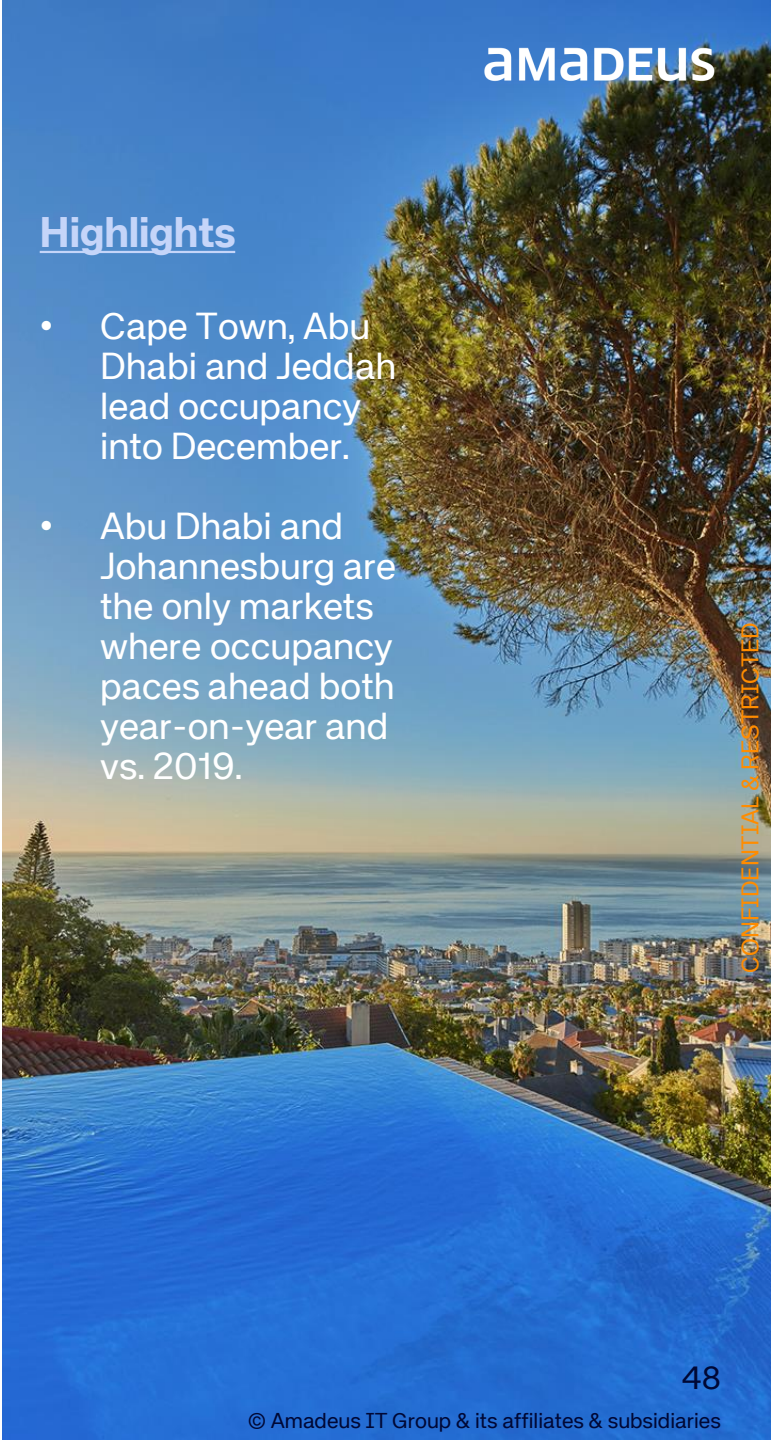
On-the-books total occupancy by market for December 2024 vs. last year and 2019.



Note that the hospitality insights included are based on the current database of properties their insights as of 22 November 2024. Therefore, the insights for November represent a change compared to the data report in previous years

Highlights

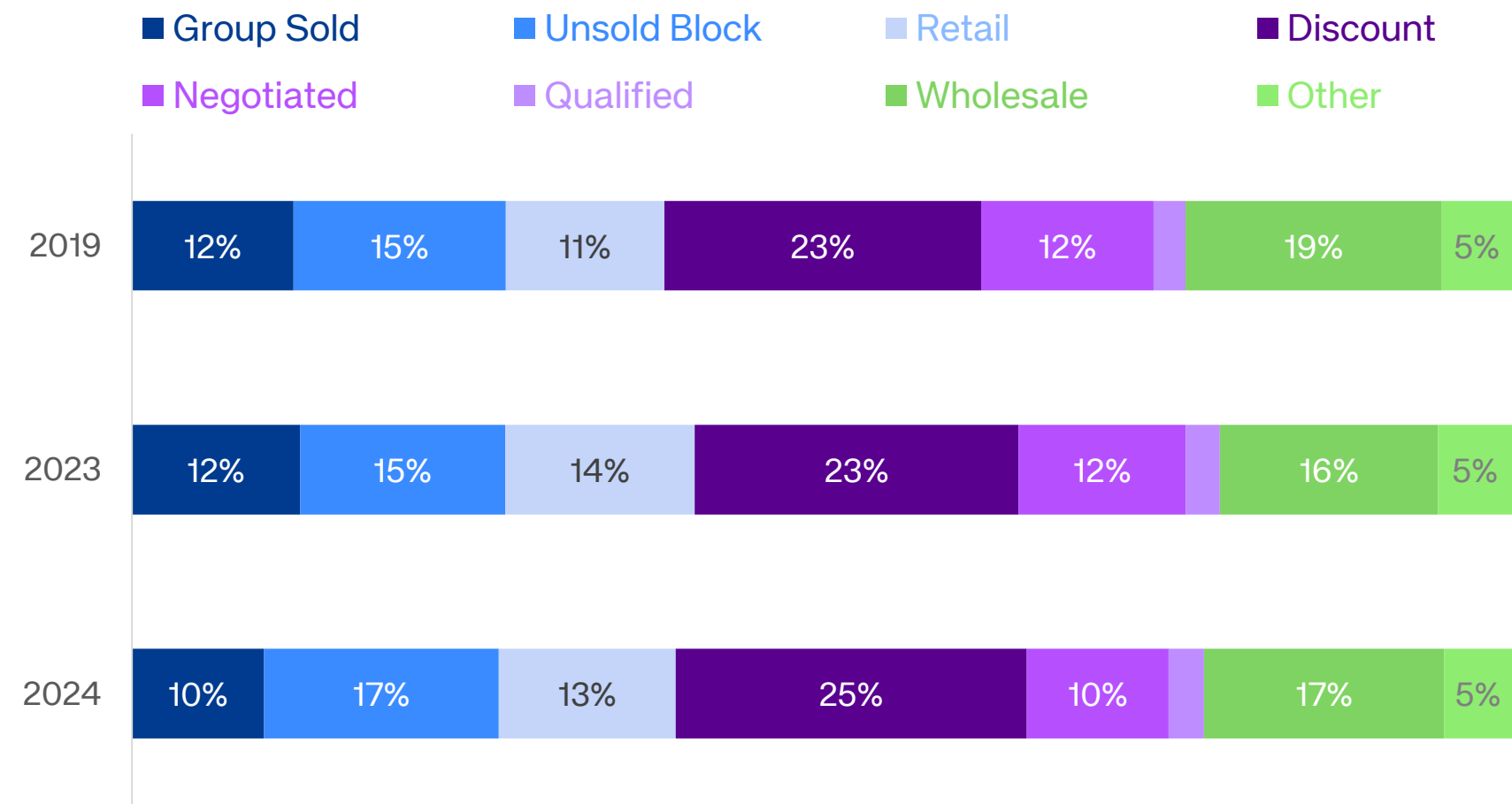
- Cape Town, Abu Dhabi and Jeddah lead occupancy into December.
- Abu Dhabi and Johannesburg are the only markets where occupancy paces ahead both year-on-year and vs. 2019.



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Year-on-Year Segmentation | Middle East & Africa

On-the-books market segmentation mix for December 2024 vs. last year and 2019.



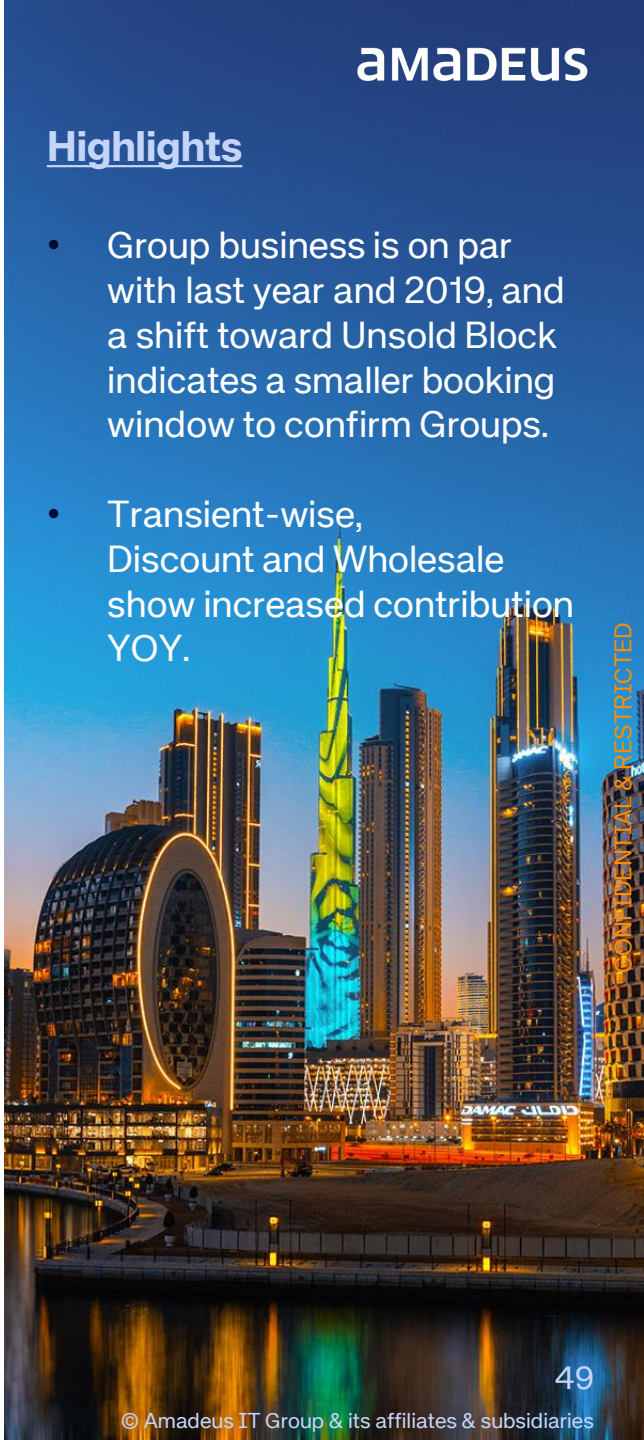
Note that the hospitality insights included are based on the current database of properties their insights as of 22 November 2024. Therefore, the insights for November represent a change compared to the data report in previous years

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Source: Amadeus Demand360® data as of 22 November, 2024.

Highlights

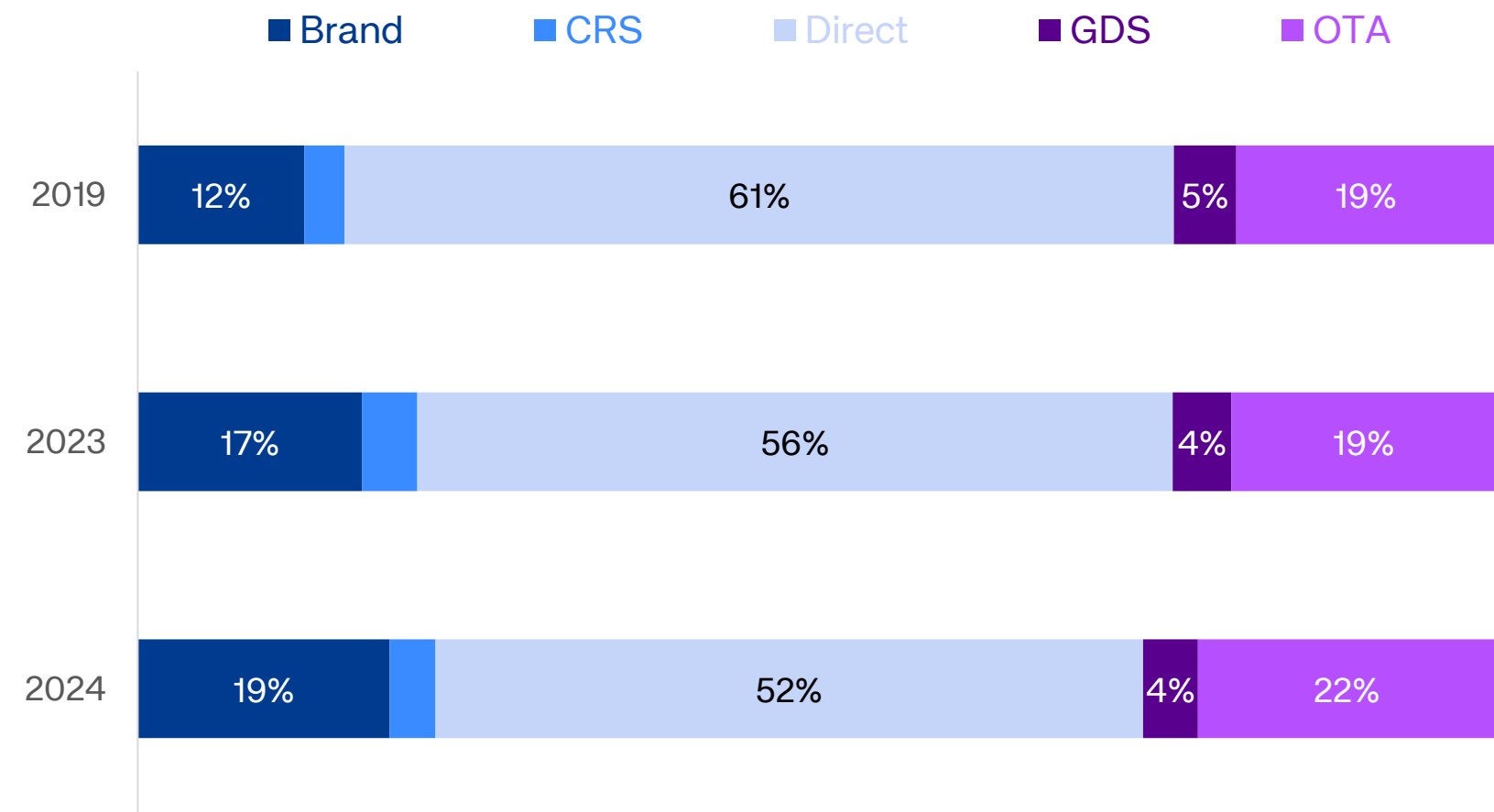
- Group business is on par with last year and 2019, and a shift toward Unsold Block indicates a smaller booking window to confirm Groups.
- Transient-wise, Discount and Wholesale show increased contribution YOY.



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

On-the-books distribution channel mix for December 2024 vs. last year and 2019.



Note that the hospitality insights included are based on the current database of properties their insights as of 22 November 2024. Therefore, the insights for November represent a change compared to the data report in previous years

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Source: Amadeus Demand360® data as of 22 November, 2024.

Highlights

- Shifting contribution from Direct to other channels continues month-on-month and year-on-year.
- Brand and OTAs both receive the shifting business.



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Latin America



Top 10 Cities for Airline Inbound YoY | Latin America

Top international airline searches into Latin America for December 2024 and last year.

Searched Year-over-Year			
	2023		2024
1	US: Others	=	US: Others
2	New York City, USA	↘	Buenos Aires, Argentina
3	Buenos Aires, Argentina	↗	New York City, USA
4	Sao Paulo, Brazil	=	Sao Paulo, Brazil
5	Madrid, Spain	↘	Santiago, Chile
6	Miami, USA	↘	Madrid, Spain
7	London, UK	↘	Miami, USA
8	Los Angeles, USA	=	Los Angeles, USA
9	Santiago, Chile	↗	London, UK
10	Paris, France	=	Paris, France

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 20 November, 2024

Highlights

- There are limited shifts in markets searching for Latin America into December this year over last year.
- Top 10 searching markets have not changed into December year-on-year.



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Top 10 Cities for Airline Inbound | Latin America

Top airline searches vs. bookings for December 2024.

	Searched		Booked
1	US: Others	=	US: Others
2	Buenos Aires, Argentina	=	Buenos Aires, Argentina
3	New York City, USA	=	New York City, USA
4	Sao Paulo, Brazil	↘	Los Angeles, USA
5	Santiago, Chile	=	Santiago, Chile
6	Madrid, Spain	=	Madrid, Spain
7	Miami, USA	↘	Sao Paulo, Brazil
8	Los Angeles, USA	↗	Miami, USA
9	London, UK	↓	Chicago, USA
10	Paris, France	↓	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

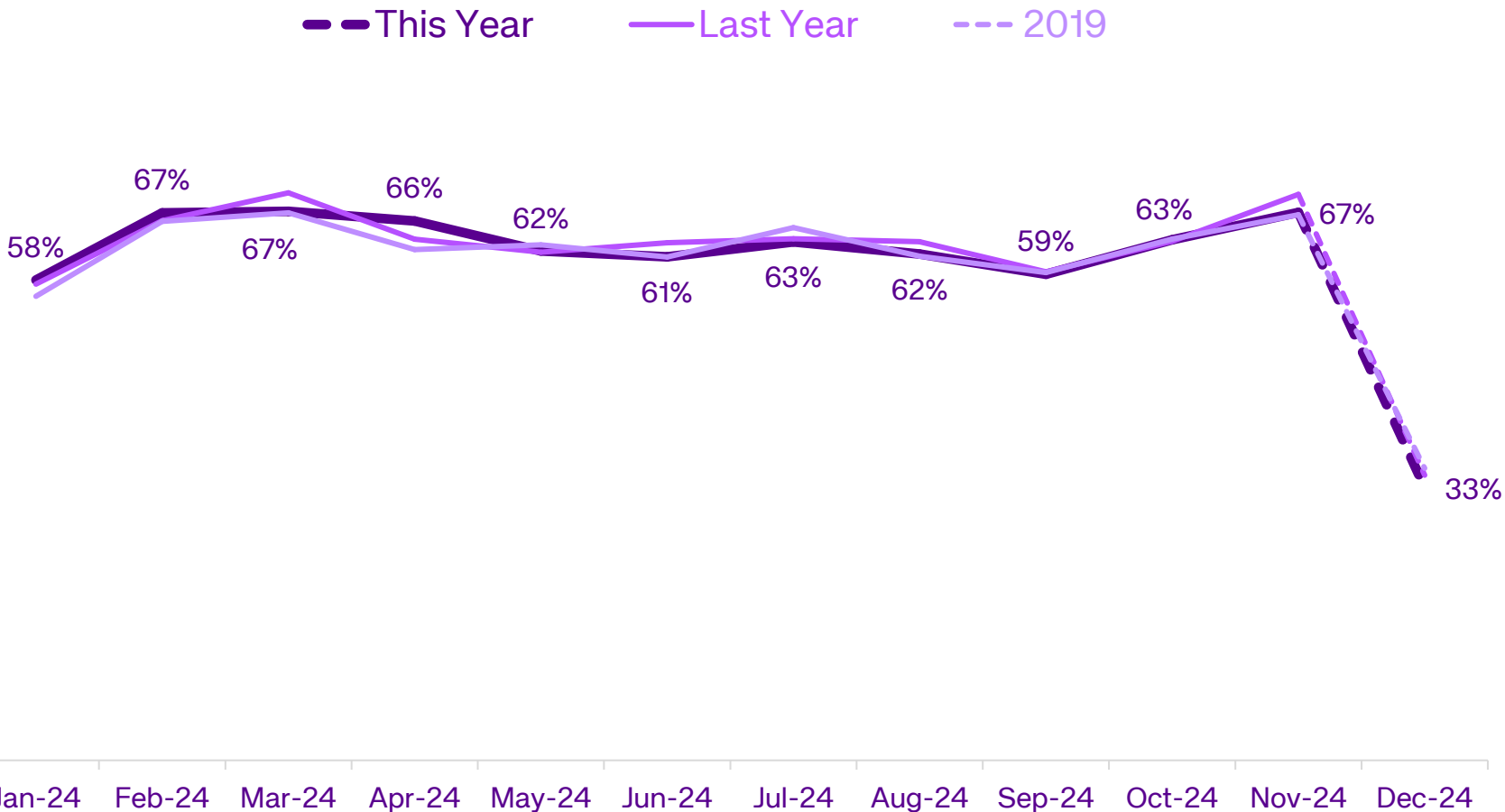
Highlights

- Most markets in the top 10 searching Latin America, are those travelling.
- Only London and Paris drop from top 10 searching to travelling markets in December.

Source: Amadeus Navigator360™ data as of 20 November, 2024

2024 Hotel Occupancy | Latin America

On-the-books by month compared to same time last year and 2019.



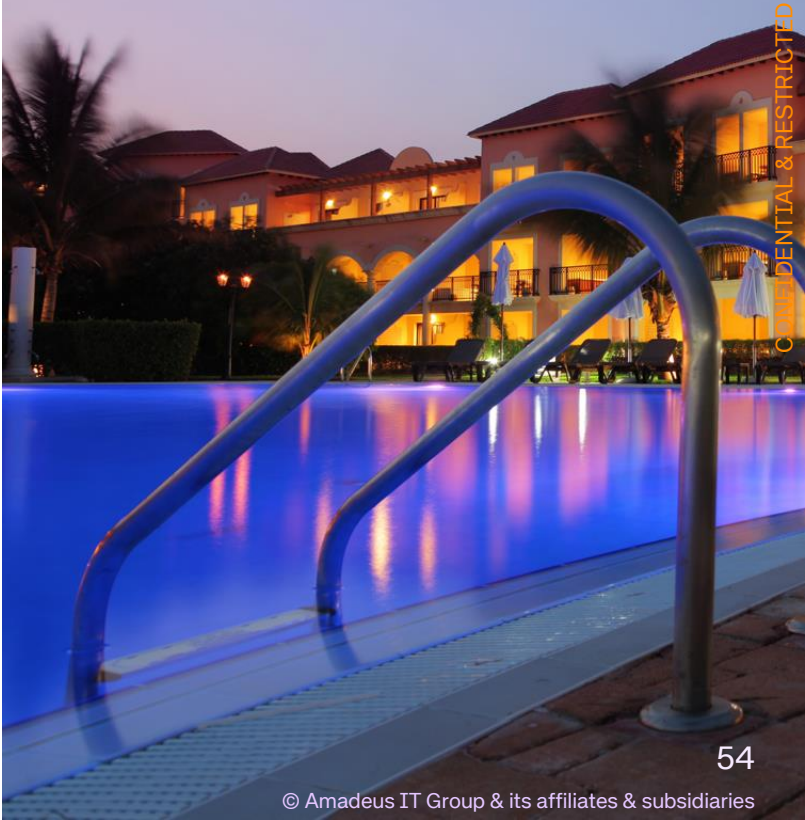
Note that the hospitality insights included are based on the current database of properties their insights as of 22 November 2024. Therefore, the insights for November represent a change compared to the data report in previous years

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Source: Amadeus Demand360® data as of 22 November, 2024.

Highlights

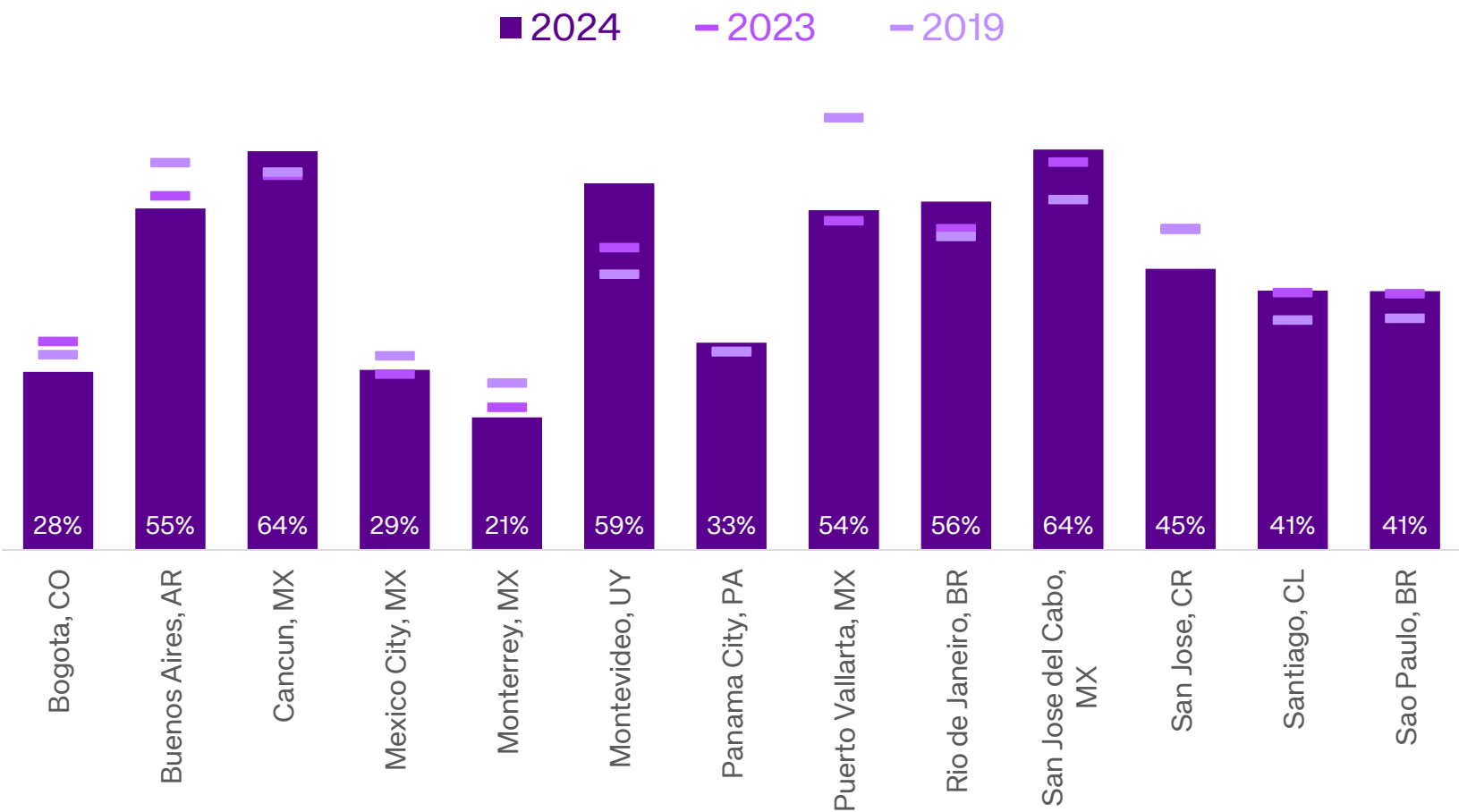
- November is setting to close at same levels as 2019, yet 2 percentage points under last year.
- December occupancy continues pacing slightly behind previous years.



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Occupancy & Pace by Market | Latin America

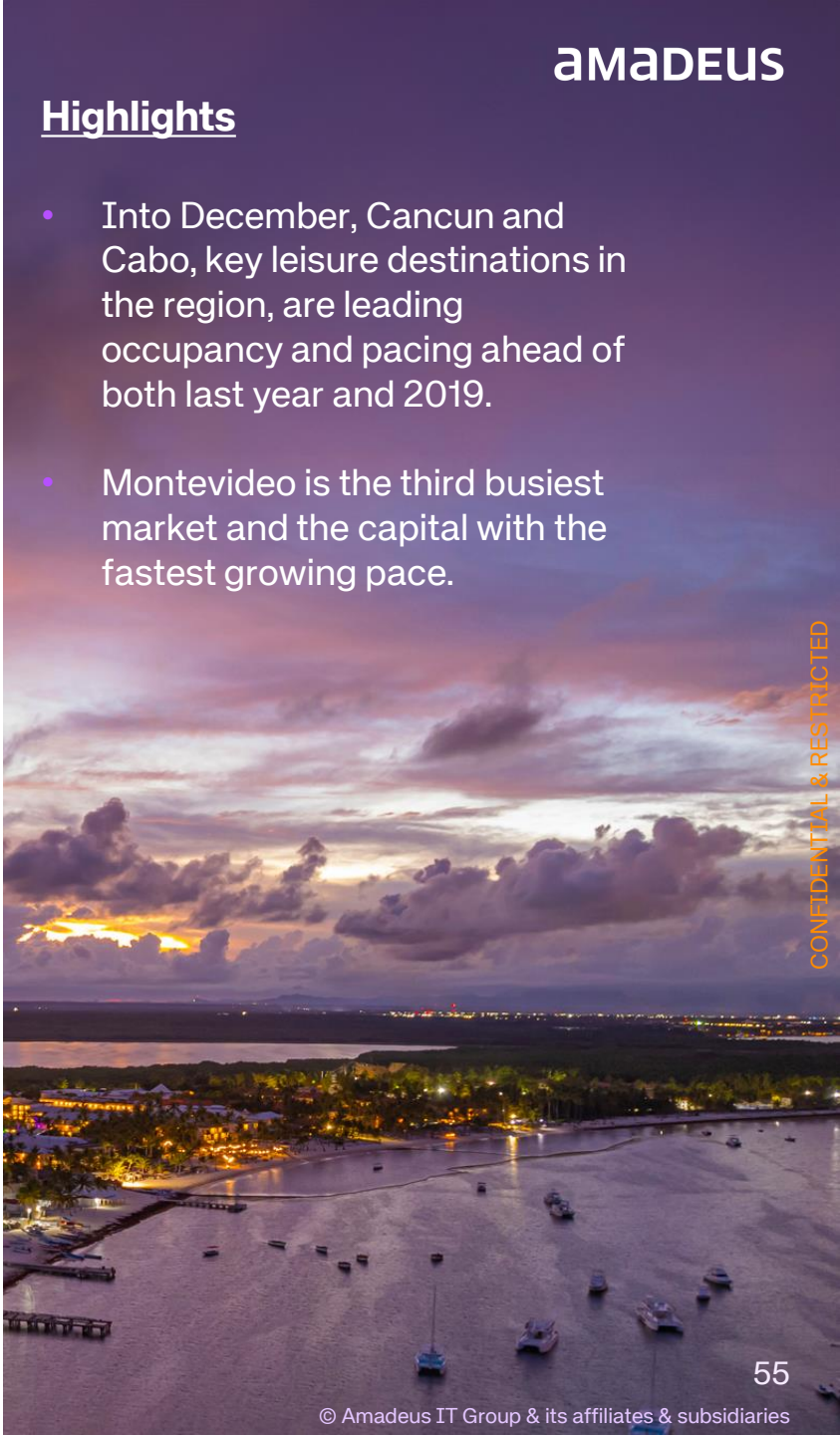
On-the-books total occupancy by market for December 2024 vs. last year and 2019.



Note that the hospitality insights included are based on the current database of properties their insights as of 22 November 2024. Therefore, the insights for November represent a change compared to the data report in previous years

Highlights

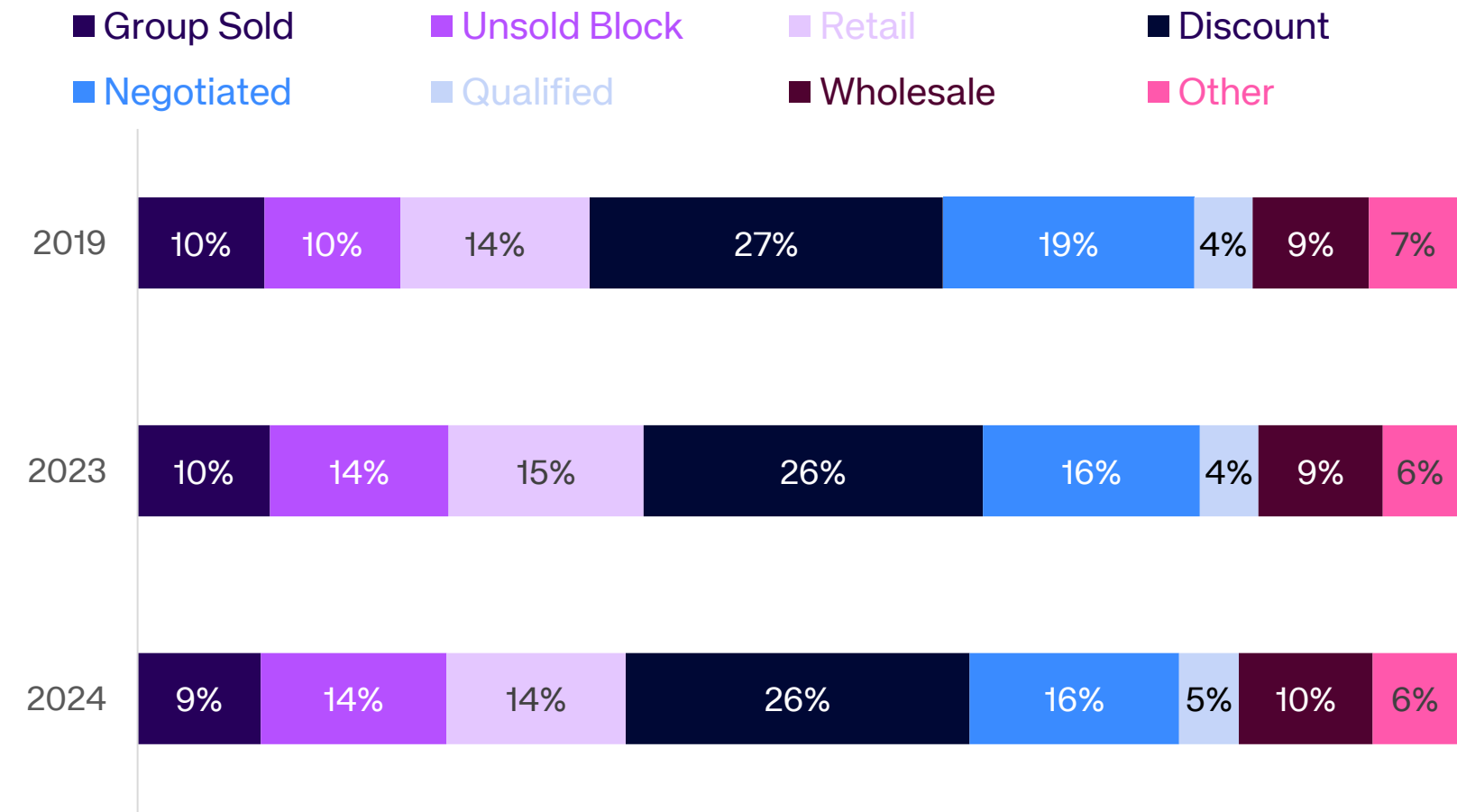
- Into December, Cancun and Cabo, key leisure destinations in the region, are leading occupancy and pacing ahead of both last year and 2019.
- Montevideo is the third busiest market and the capital with the fastest growing pace.



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Year-on-Year Segmentation | Latin America

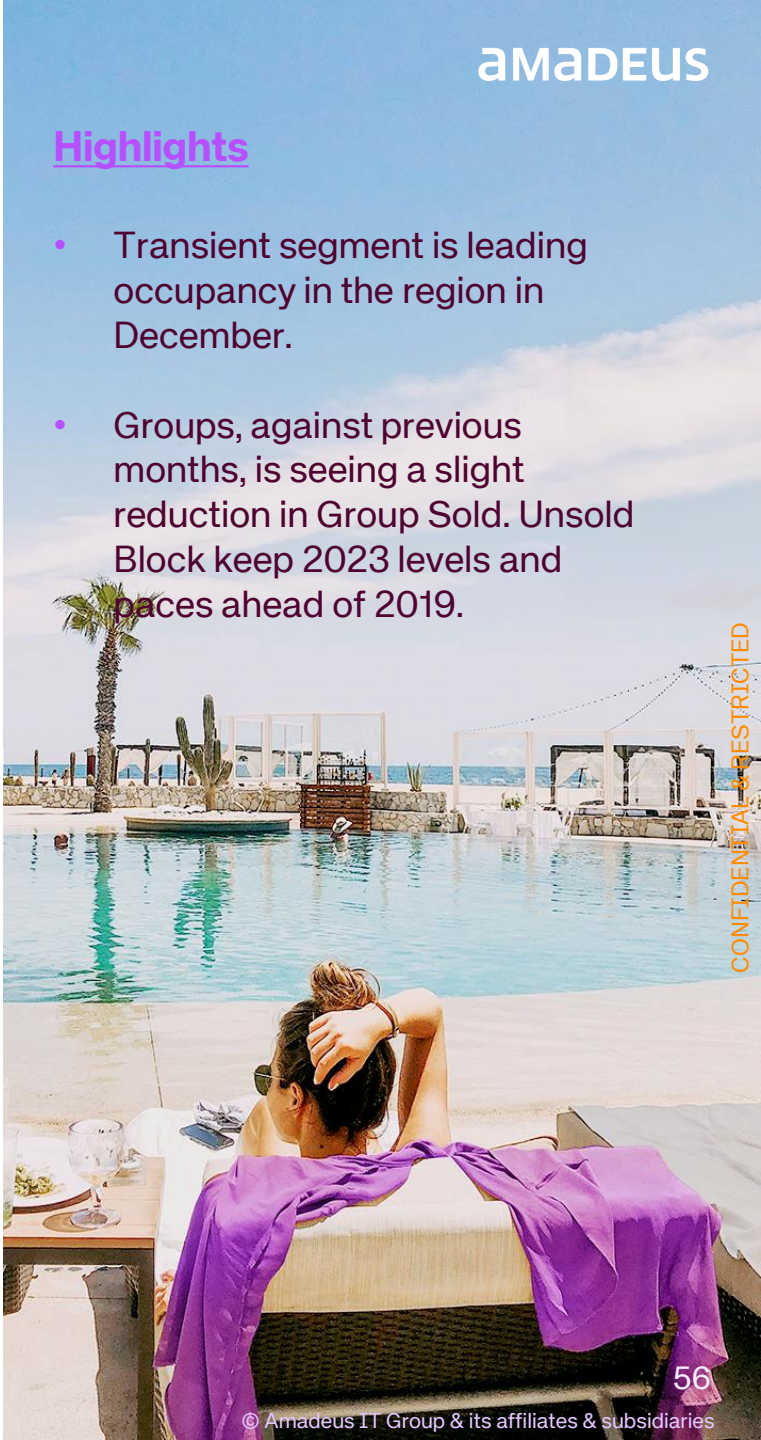
On-the-books market segmentation mix for December 2024 vs. last year and 2019.



Note that the hospitality insights included are based on the current database of properties their insights as of 22 November 2024. Therefore, the insights for November represent a change compared to the data report in previous years

Highlights

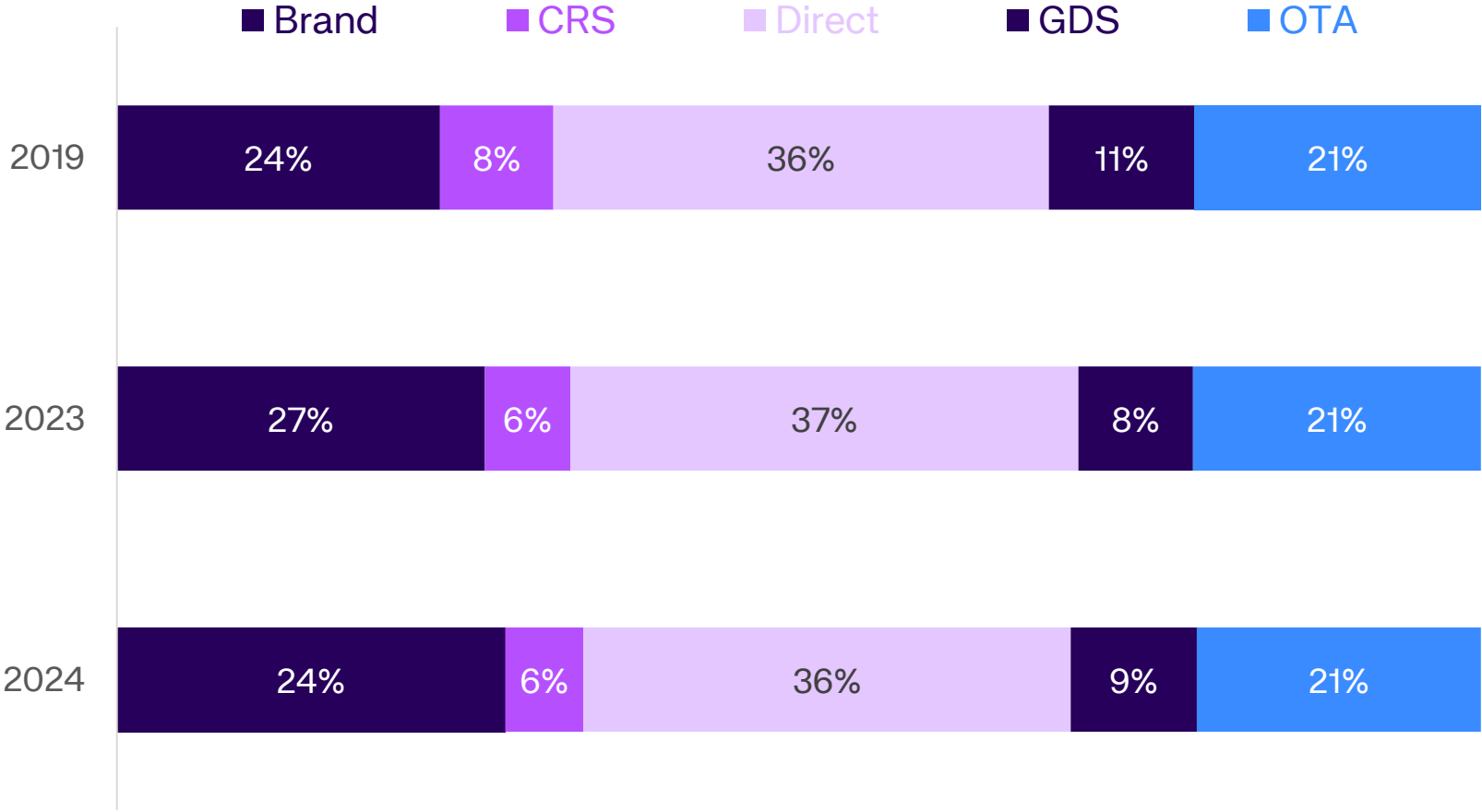
- Transient segment is leading occupancy in the region in December.
- Groups, against previous months, is seeing a slight reduction in Group Sold. Unsold Block keep 2023 levels and paces ahead of 2019.



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Year-on-Year Channel Mix | Latin America

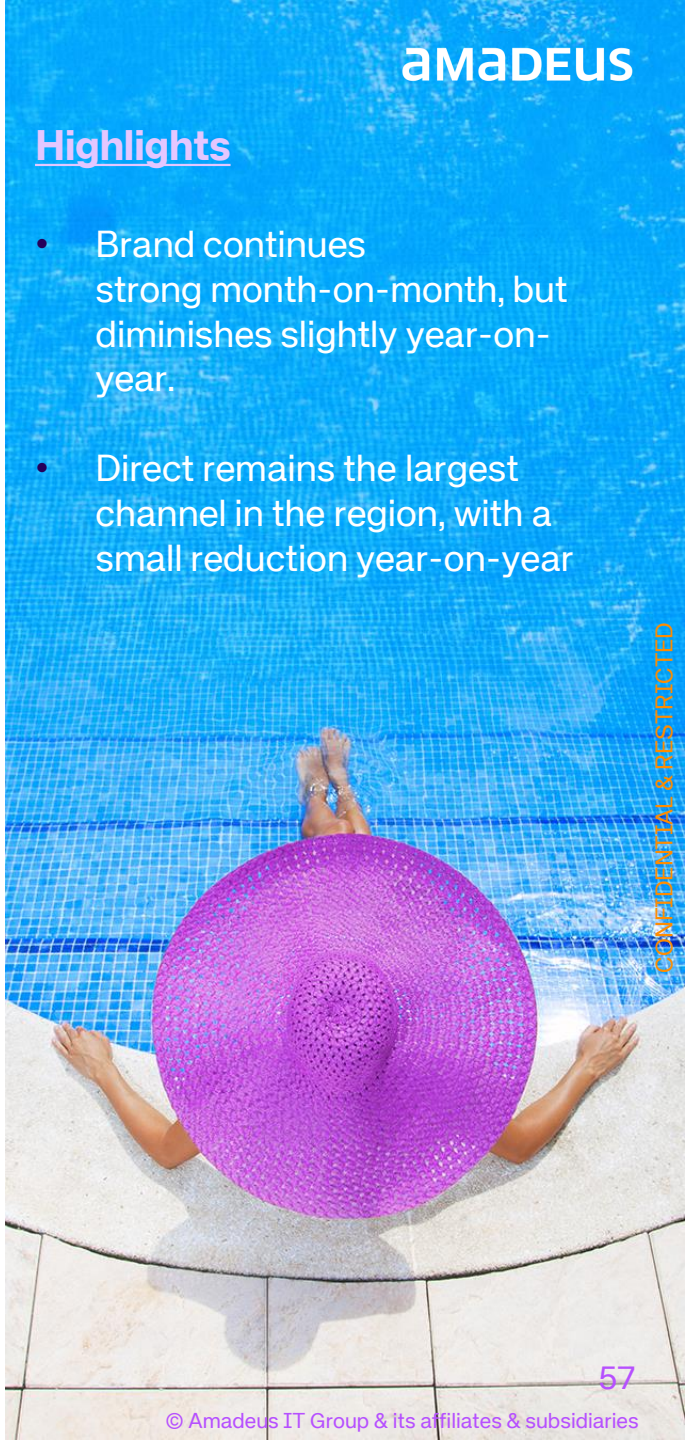
On-the-books distribution channel mix for December 2024 vs. last year and 2019.



Note that the hospitality insights included are based on the current database of properties their insights as of 22 November 2024. Therefore, the insights for November represent a change compared to the data report in previous years

Highlights

- Brand continues strong month-on-month, but diminishes slightly year-on-year.
- Direct remains the largest channel in the region, with a small reduction year-on-year





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