



ANZ Performance Update

HICAP ANZ Update - Summer 2021 25 February 2021

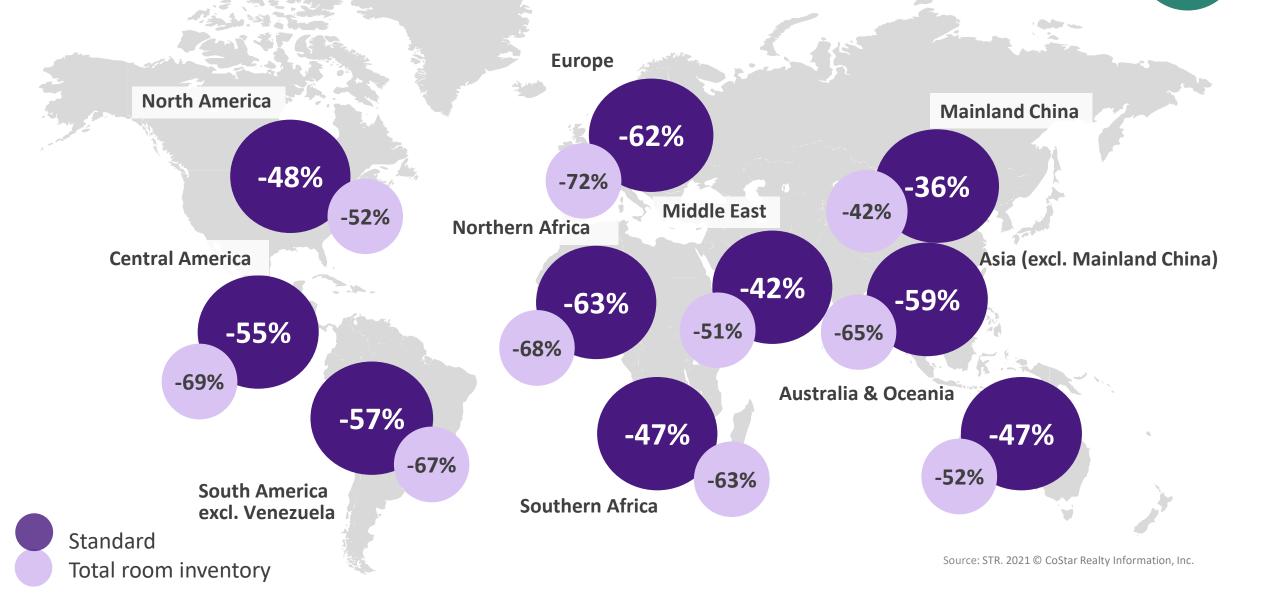
Matthew Burke | Regional Manager, Pacific

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2020 TRI RevPAR down > 50% most places, Europe down 72%

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RevPAR % Change, CC, USD, open hotels (standard) & total room inventory (TRI), Full Year 2020

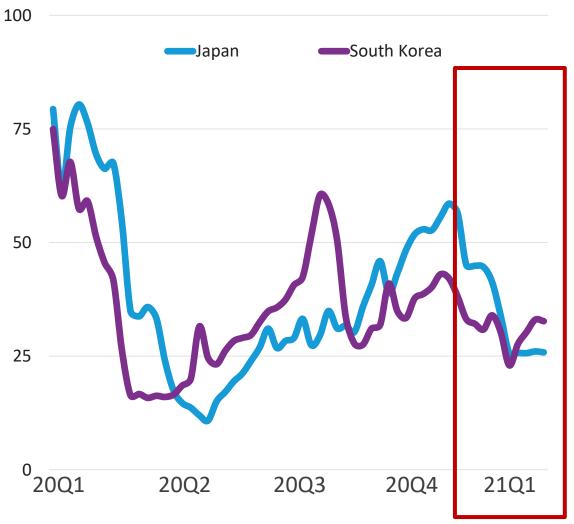


Can't hide the fact that in APAC – that '21 Q1 trend stays bumpy

Weekly Occupancy, Jan 1 2020 – Feb 6 2021







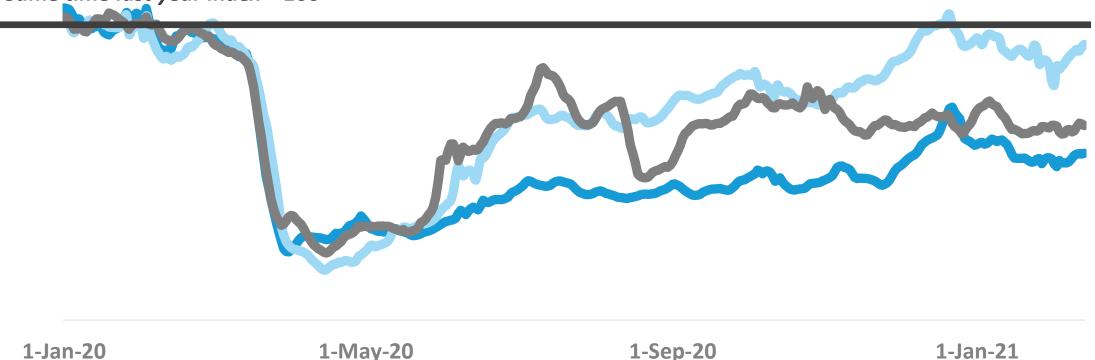
For Australia & New Zealand much more of the same trend though



Regional Australia surpasses 2019 demand across the festive season Australia split, Rolling 7 day indexed demand to prior year, January 2020 to Feb 2021



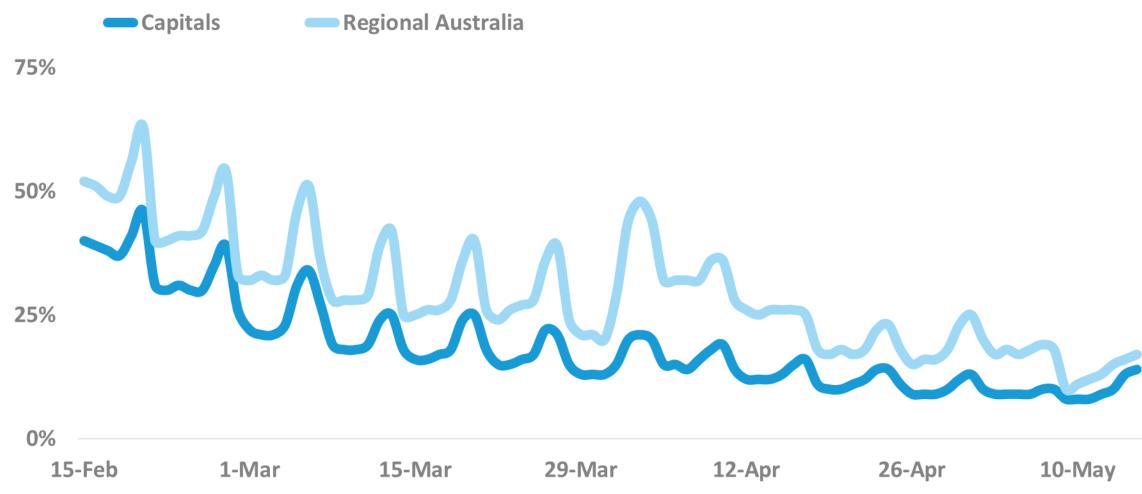




The trend for Australia at least appears like it will continue

Occupancy on the books for the next 90 days as at 15 February 2021

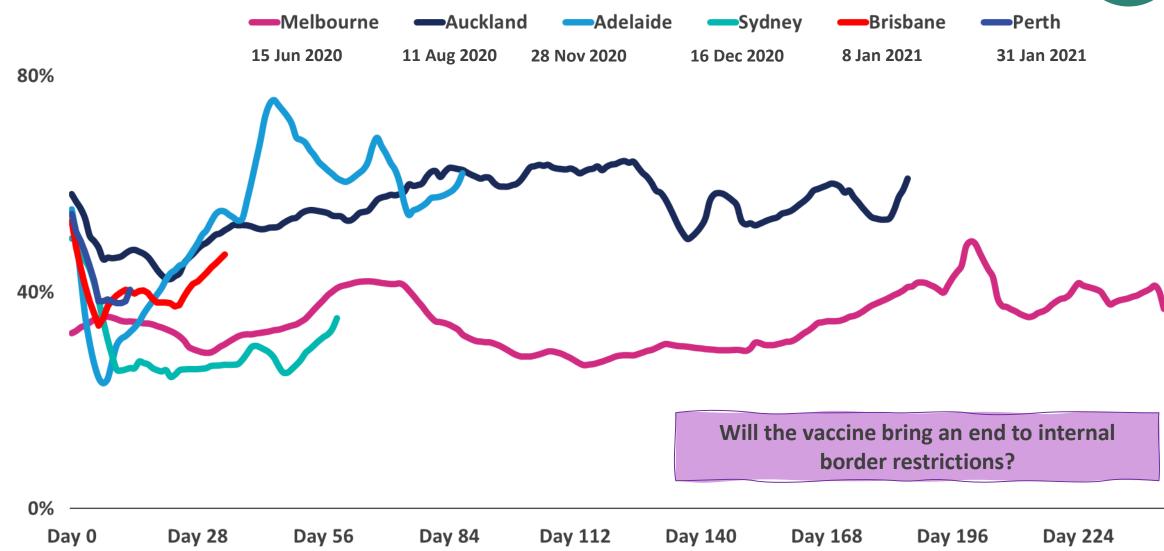




What happens when a community case is detected?

Second Wave recovery time frames: circuit breaking vs suppression perspective

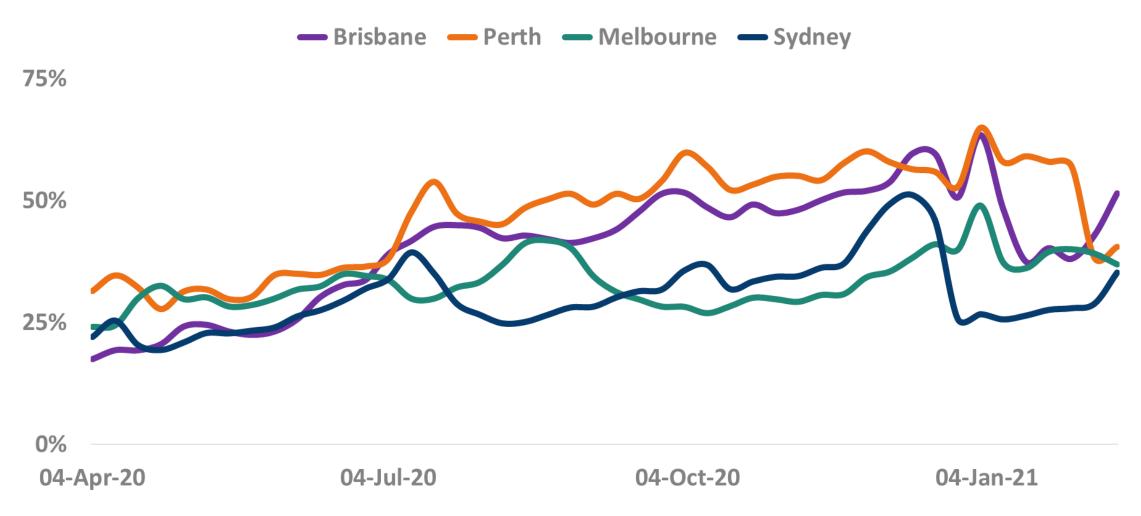




Sydney & Melbourne continue to lag the other capital cities

Rolling 7 day Occupancy % April 2020 – Feb 2021

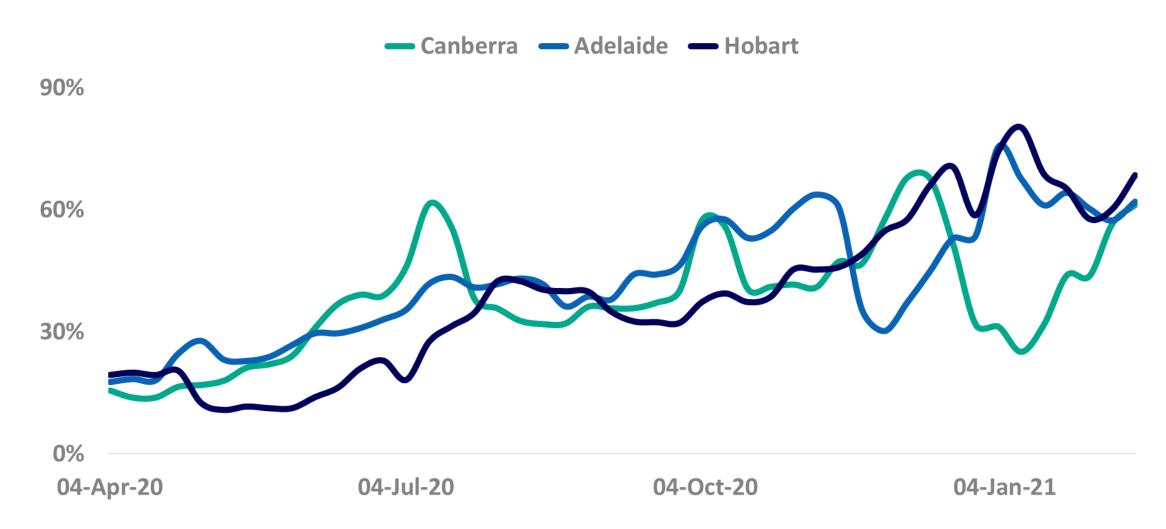




The smaller capitals have stimulated to create occupancy

Rolling 7 day Occupancy % April 2020 – Feb 2021

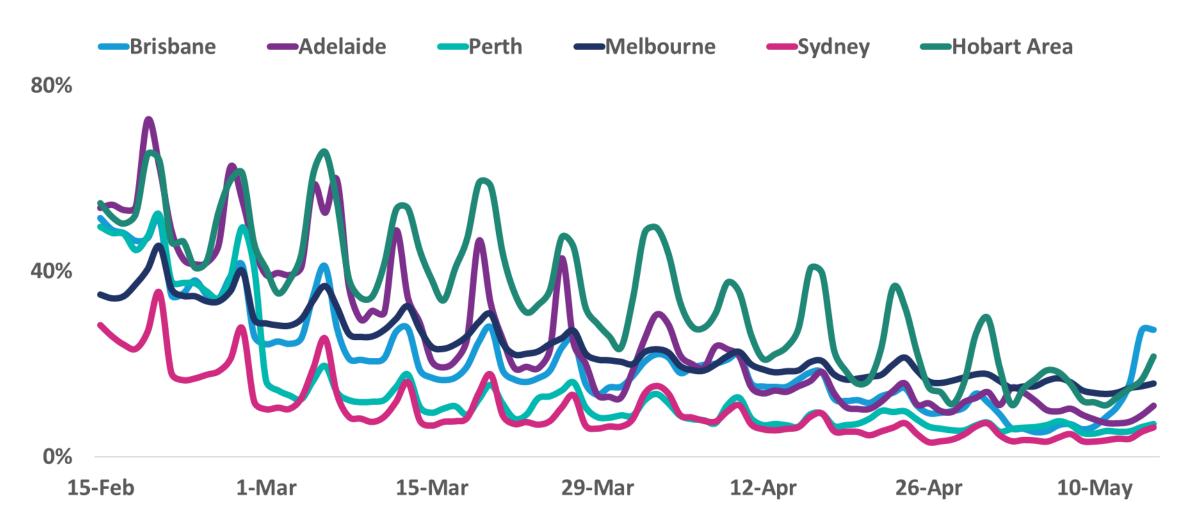




Corporate travellers continues to stay away – weekends are the peak

Occupancy on the books for the next 90 days as at 15 February 2021

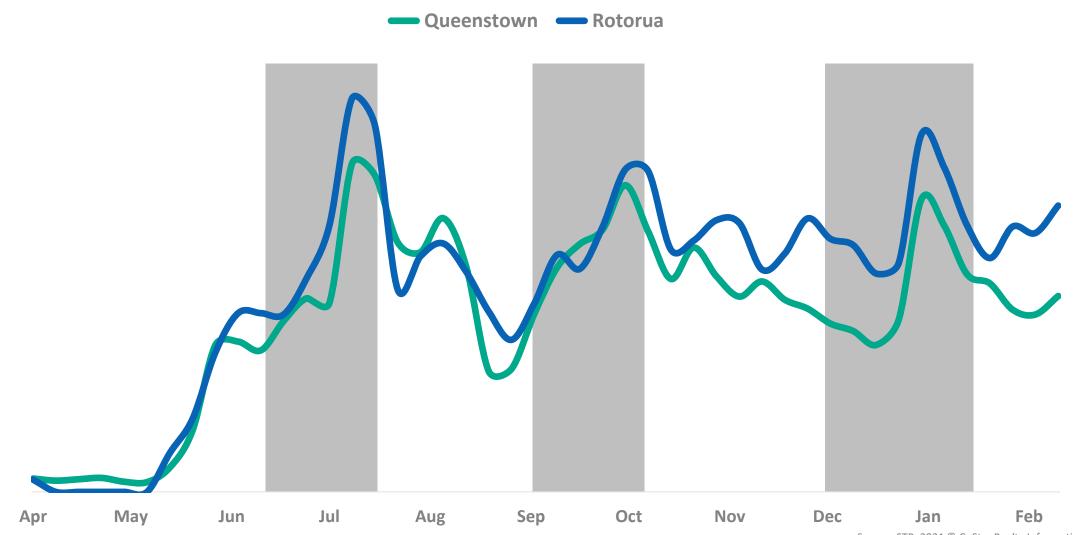




Queenstown & Rotorua wait for school holiday bounce

Rolling 7 day Occupancy % April 2020 – Feb 2021

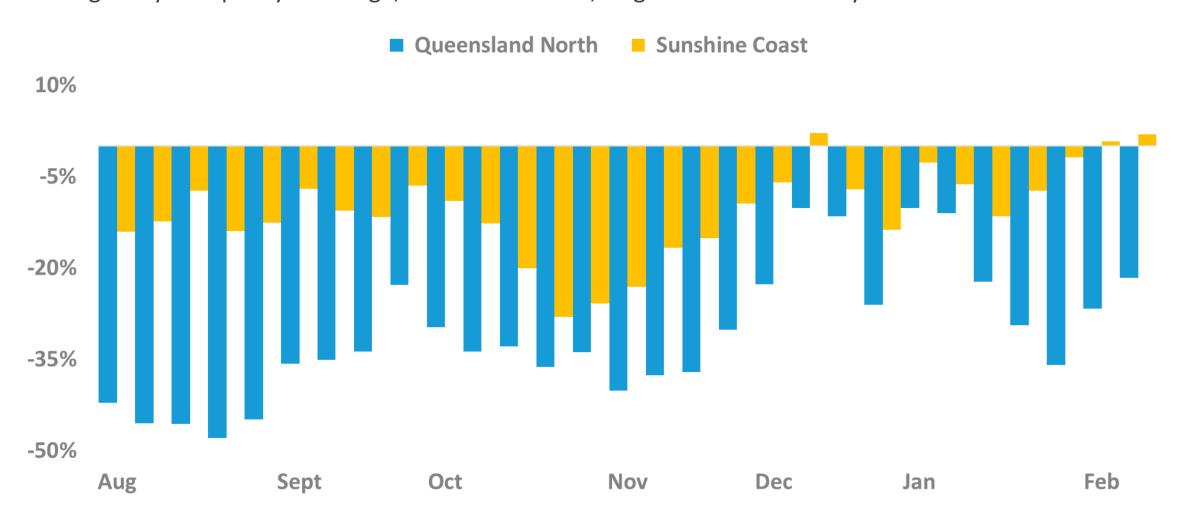




Distance to a destination makes a difference

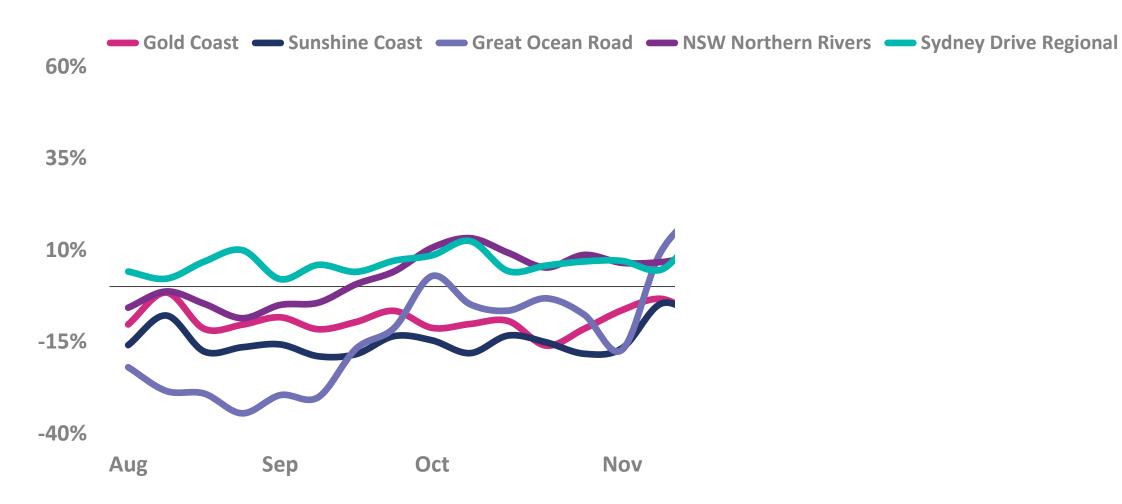


Sunshine Coast was one of the early benefactors of intrastate demand while for NQ a bit longer Rolling 7 day occupancy % change, selected markets, August 2020 – February 2021



ADR has shown resilience... shows with limited choice but desire to getaway

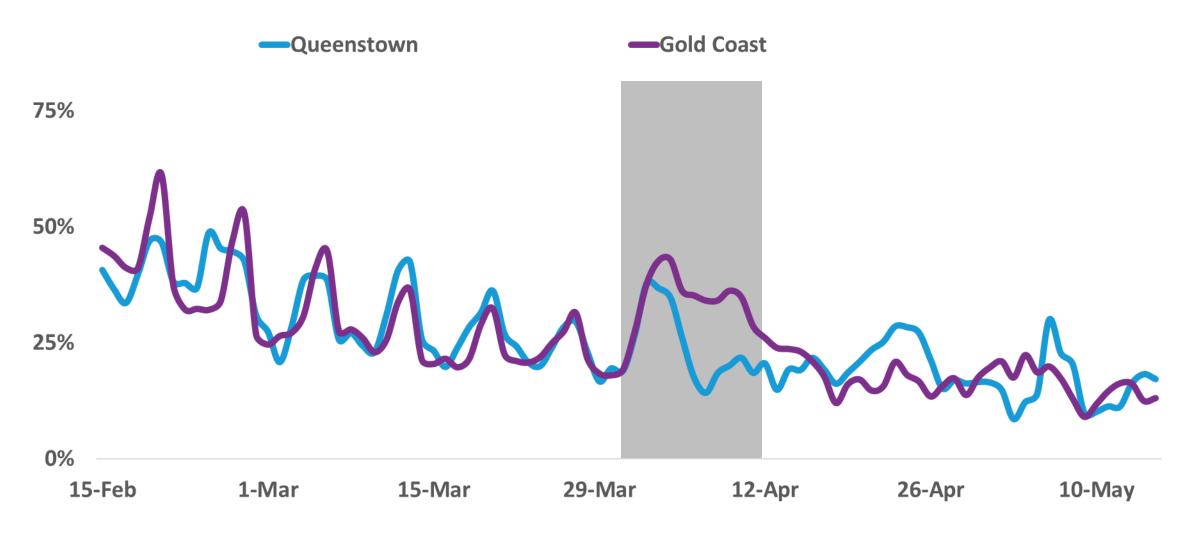
Rolling 7 days ADR % change, AUD, Aug 2020 to Feb 2021



And for now looks the same pattern for leisure into the future

Occupancy on the books for the next 90 days as at 15 February 2021

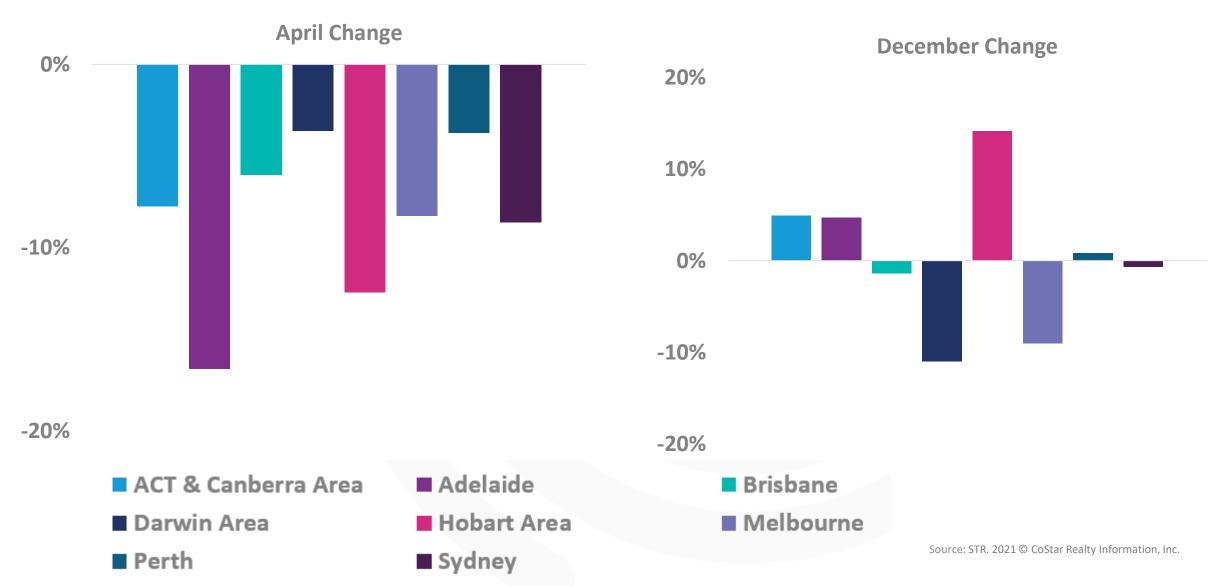




All cities saw closures – some more, others lag with sustained closures

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% change of supply rooms in April and December to February 2020





What else?

- Quarantine = 10-20% of total demand
- New supply is an ever increasing factor
- Class hasn't mattered as much in ANZ
- ADR without compression be mindful

Contact and Resources





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