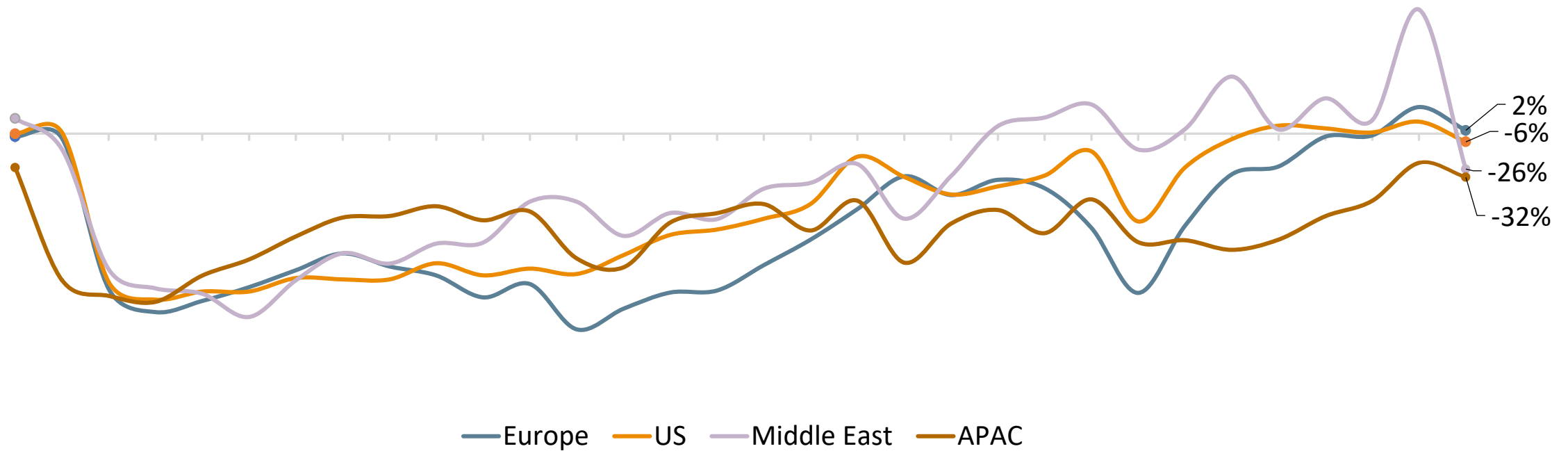


# That Recovery Chart

Month on Month Index vs 2019 – GOP Per Available Room

Jan-20

Aug-22

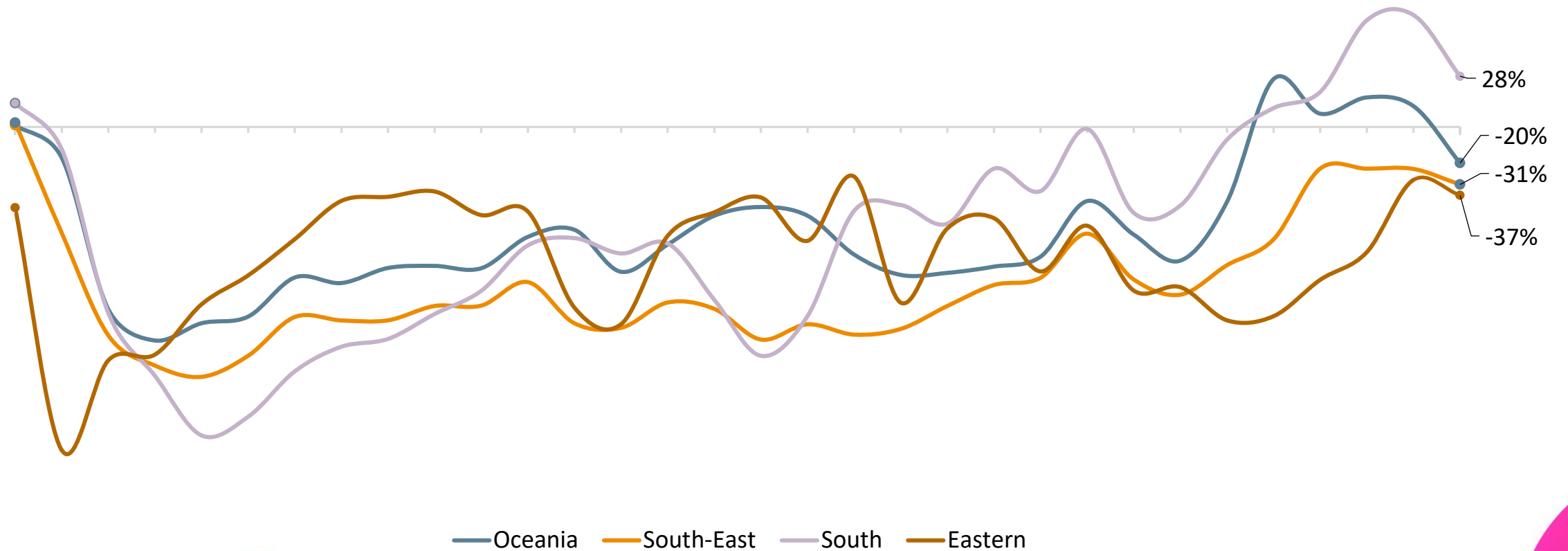


# That Recovery Chart

Month on Month Index vs 2019 – GOP Per Available Room

Jan-20

Aug-22

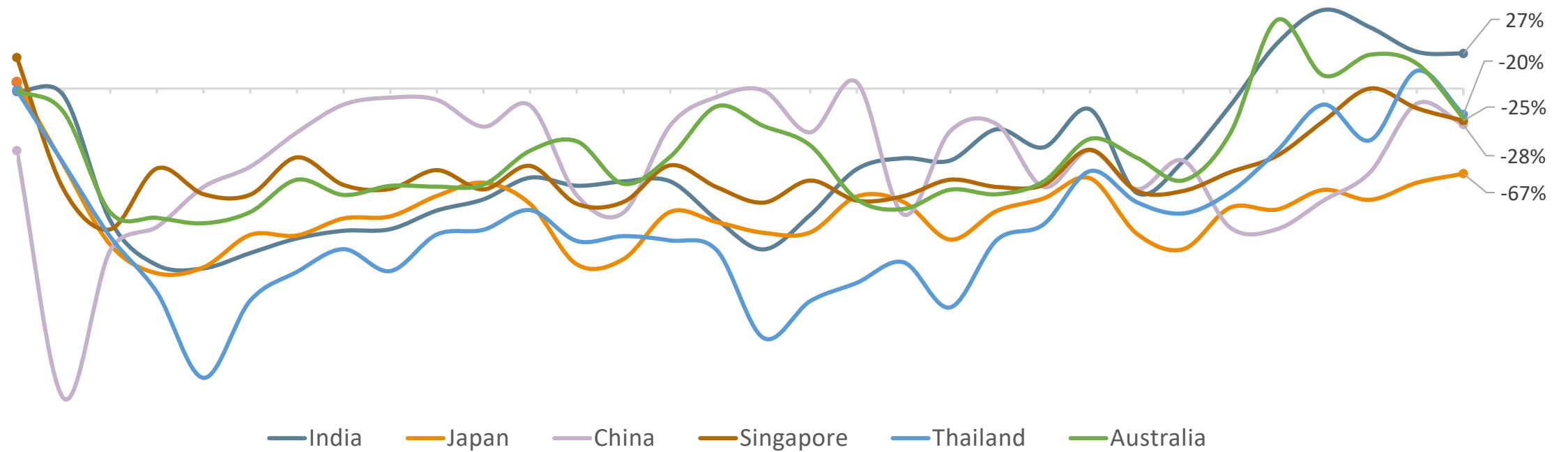


# The Recovery Position

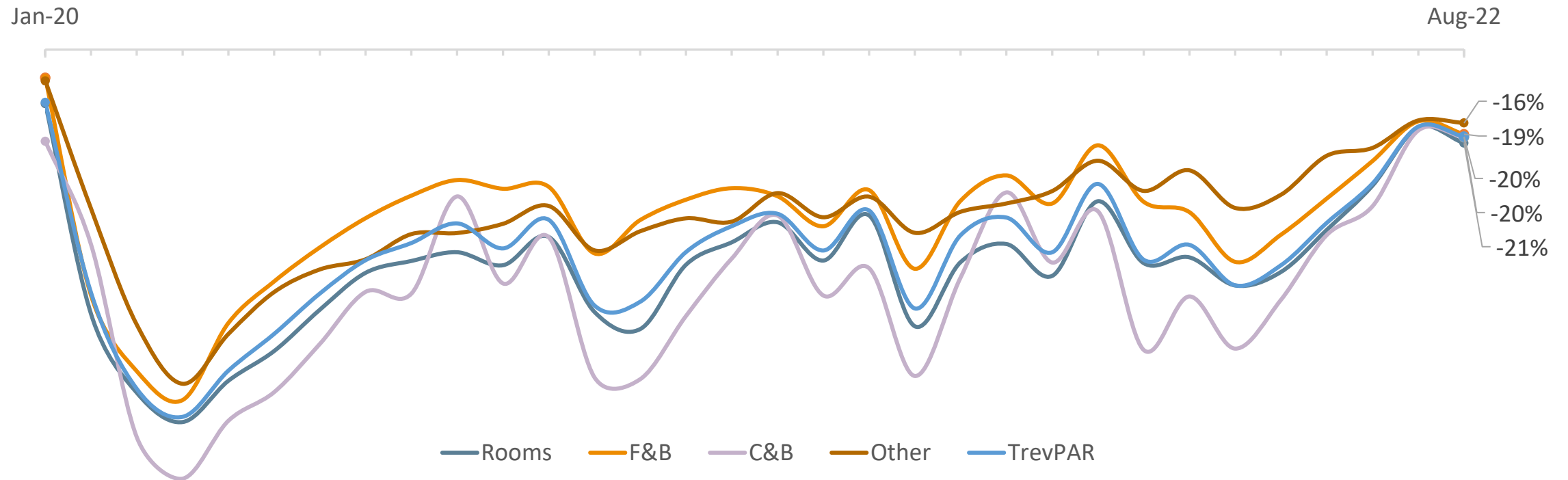
Month on Month Index vs 2019 – GOP Per Available Room

Jan-20

Aug-22

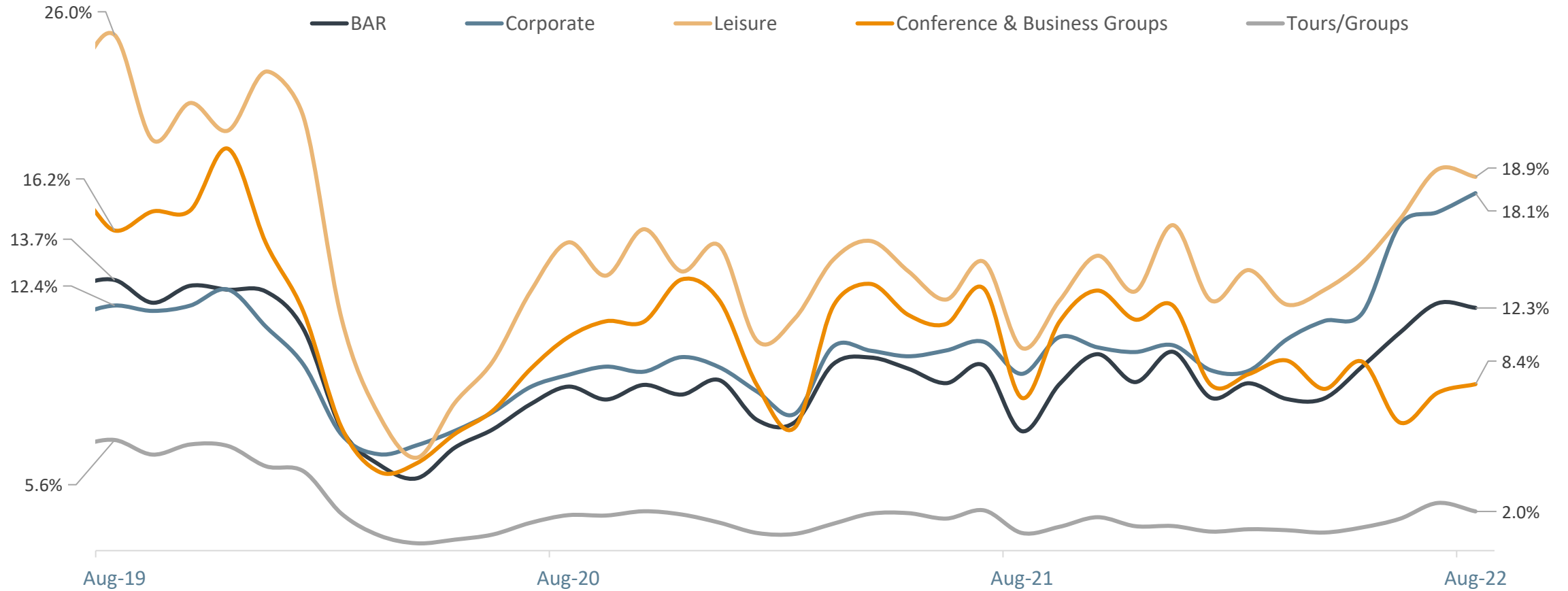


## Month on Month Index vs 2019 – Revenue Per Available Room



# Segment by Segment

Occupancy by Segment – APAC

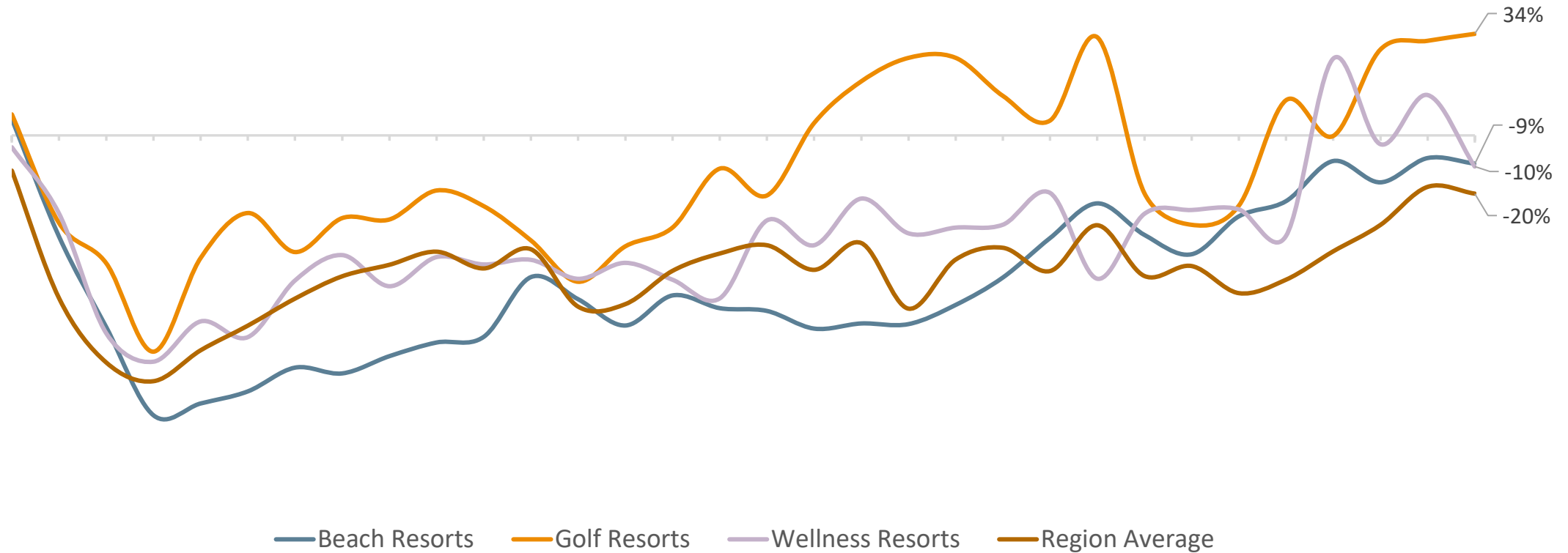


# That Recovery Chart

Month to Month Index vs 2019 – Total Revenue Per Available Room – Asia Pacific

Jan-20

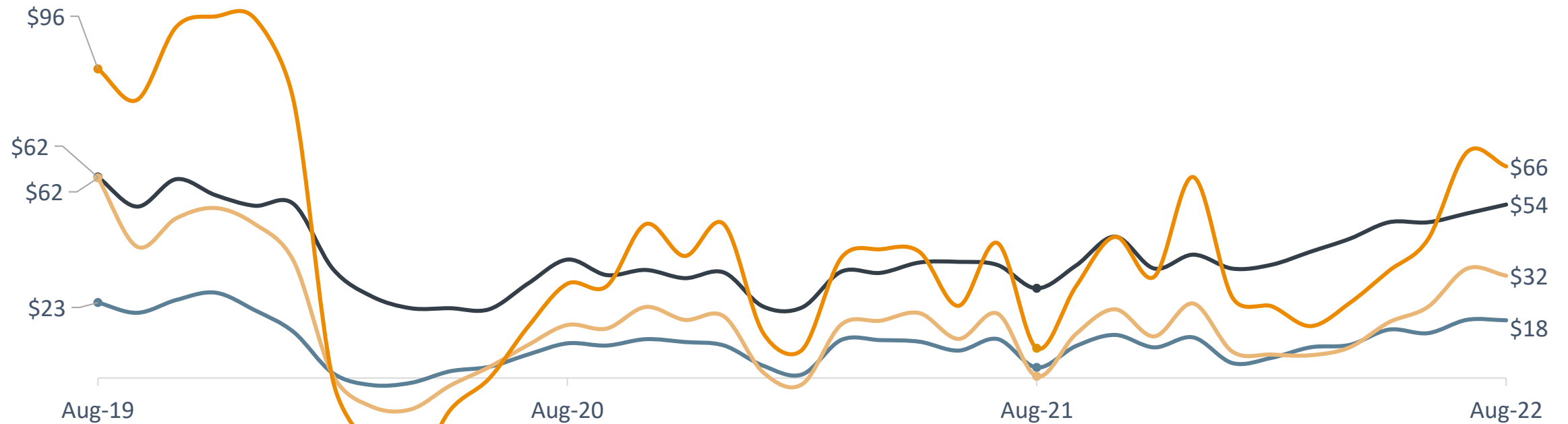
Aug-22



# Not all Created Equally

Gross Operating Profit Per Available Room

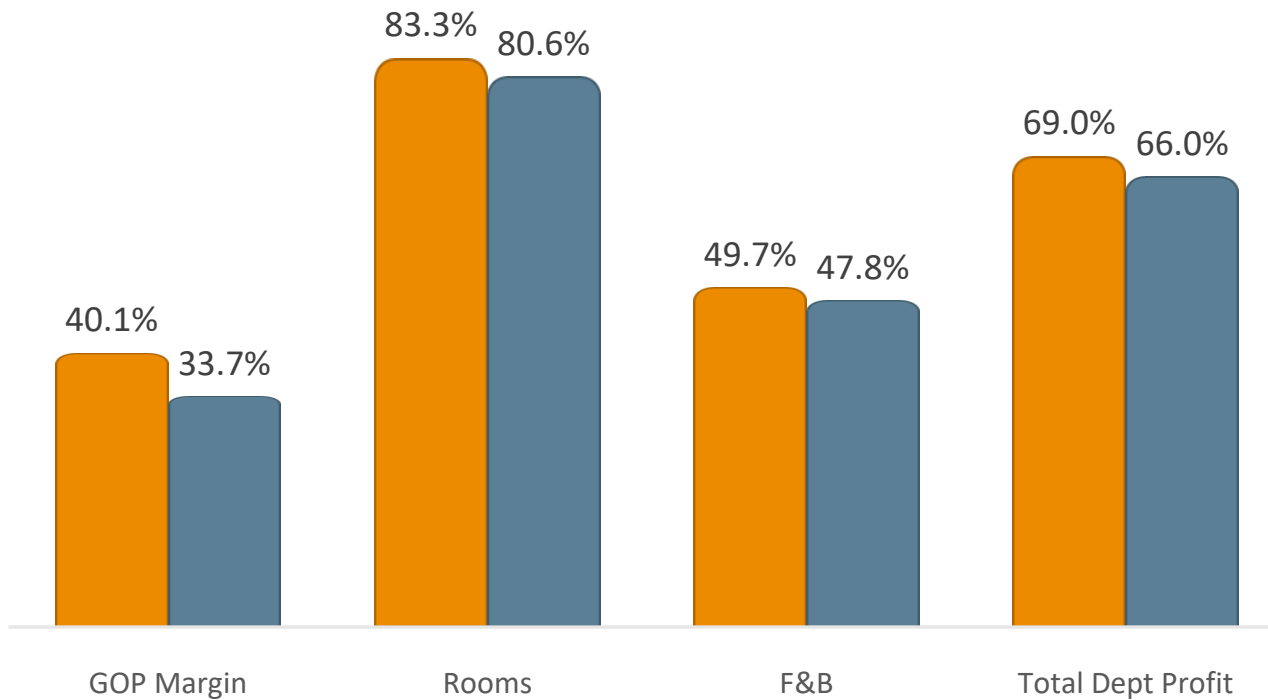
— Extended Stay — Full Service — Limited Service — Luxury



# Key Labour and Expense Trends

Rolling 6 months vs Same time 2019 – India (Full Service Only)

■ 2022 ■ 2019



Rooms Labour (POR) -15%

Linen / Laundry (POR) +15%

Booking Costs (POR) +24%

Guest Amenities (POR) +10%

F&B Cost Of Sale (%) +7%

F&B Labour (%) -14%

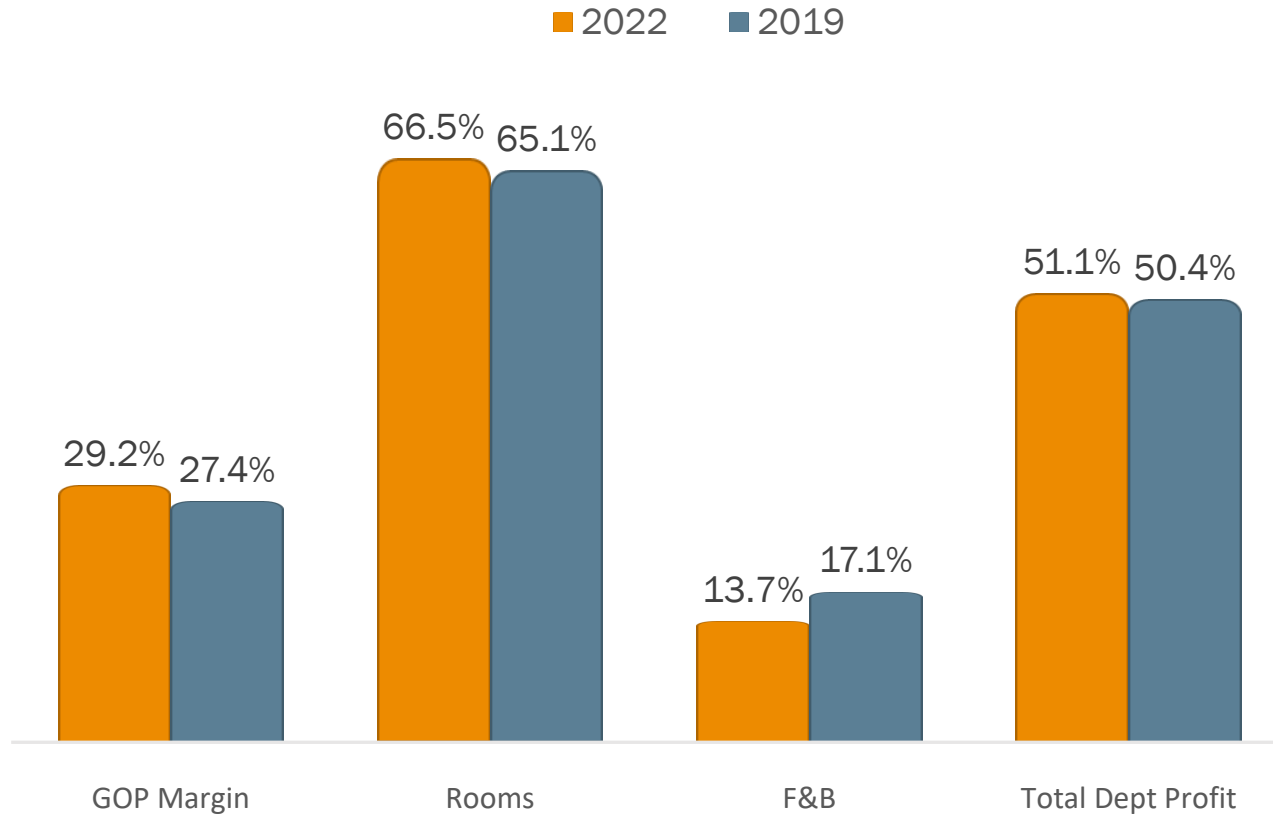
Undistributed Labour (PAR) -14%

Total Labour (PAR) -13%



# Key Labour and Expense Trends

Rolling 6 months vs Same time 2019 – Australia



Rooms Labour (POR) **+7%**

Linen / Laundry (POR) **+16%**

Booking Costs (POR) **+37%**

Guest Amenities (POR) **+8%**

F&B Cost Of Sale (%) **+7%**

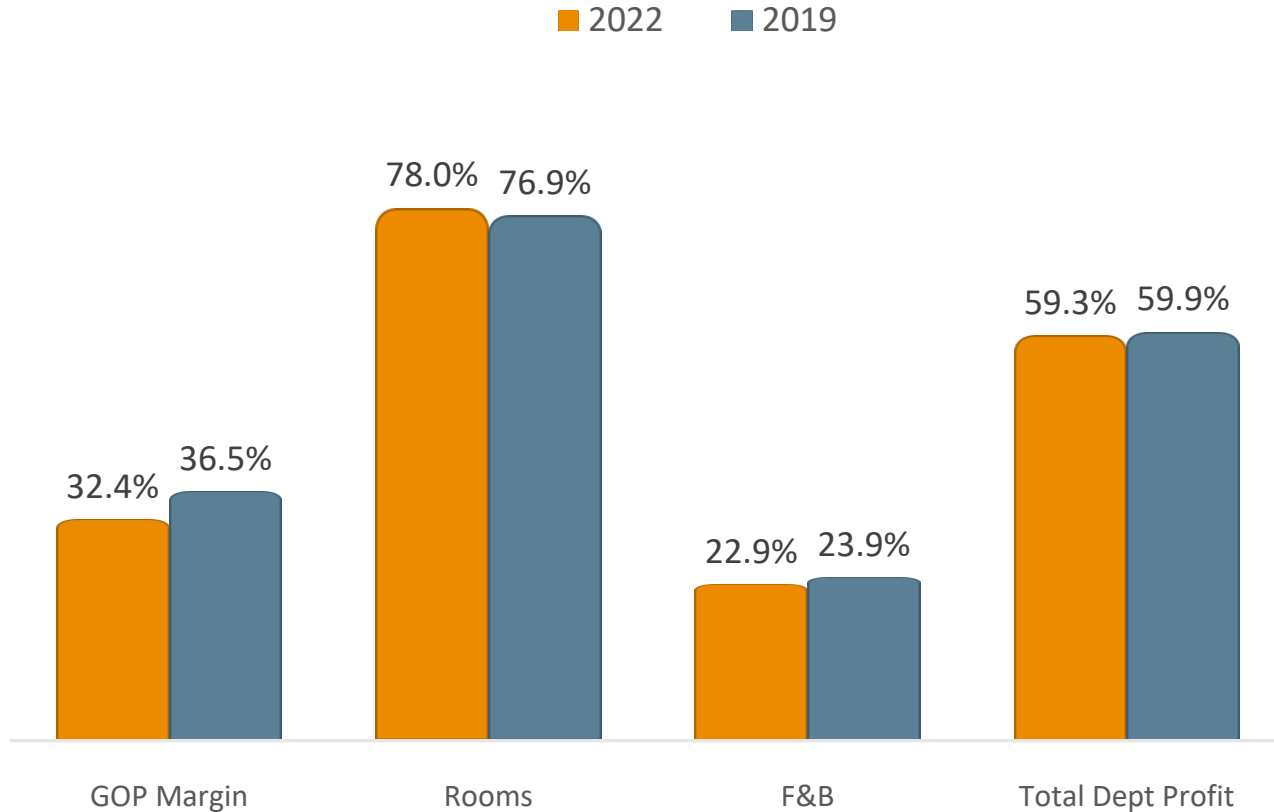
F&B Labour (%) **+5%**

Undistributed Labour (PAR) **-7%**

Undistributed Expenses (PAR) **-11%**

# Key Labour and Expense Trends

Rolling 6 months vs Same time 2019 – Singapore



Rooms Labour (POR) -4%

Linen / Laundry (POR) 14%

Booking Costs (POR) -10%

Guest Amenities (POR) -12%

F&B Cost Of Sale (%) +3%

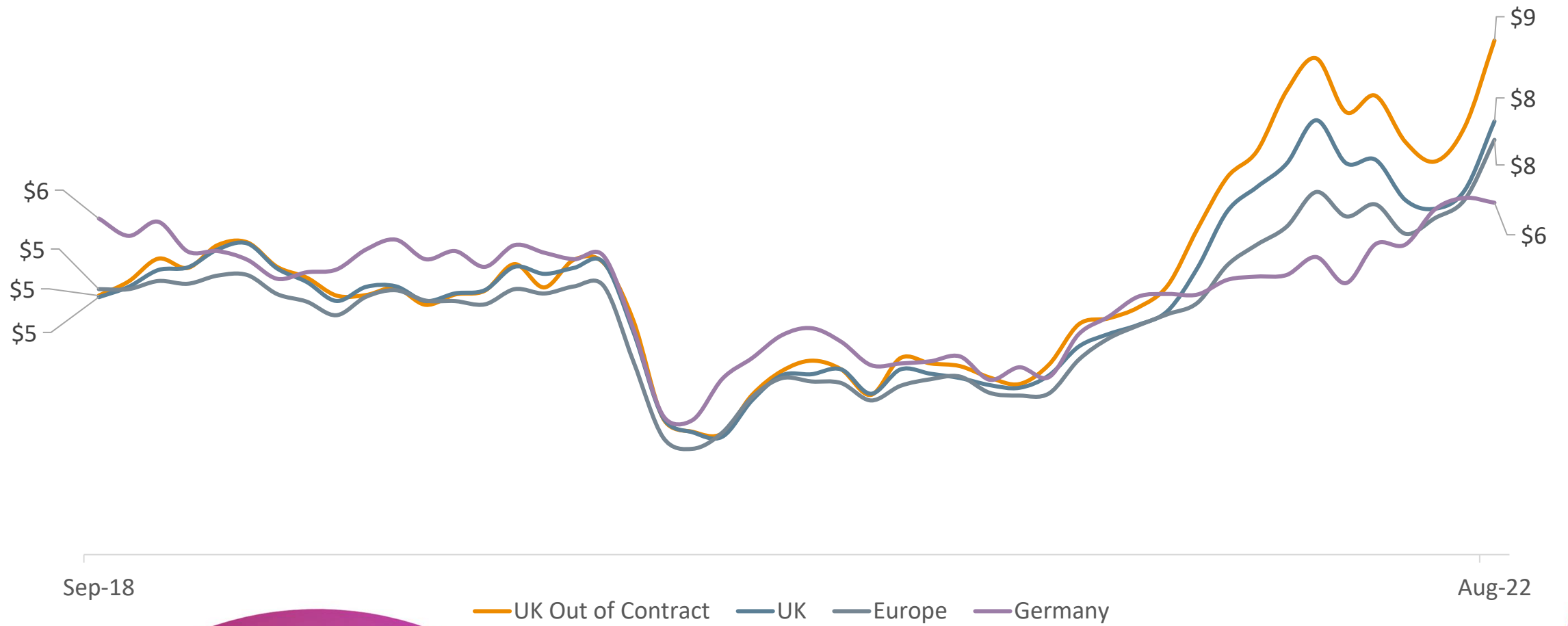
F&B Labour (%) -0.5%

Undistributed Labour (PAR) -16%

Undistributed Expenses (PAR) -15%

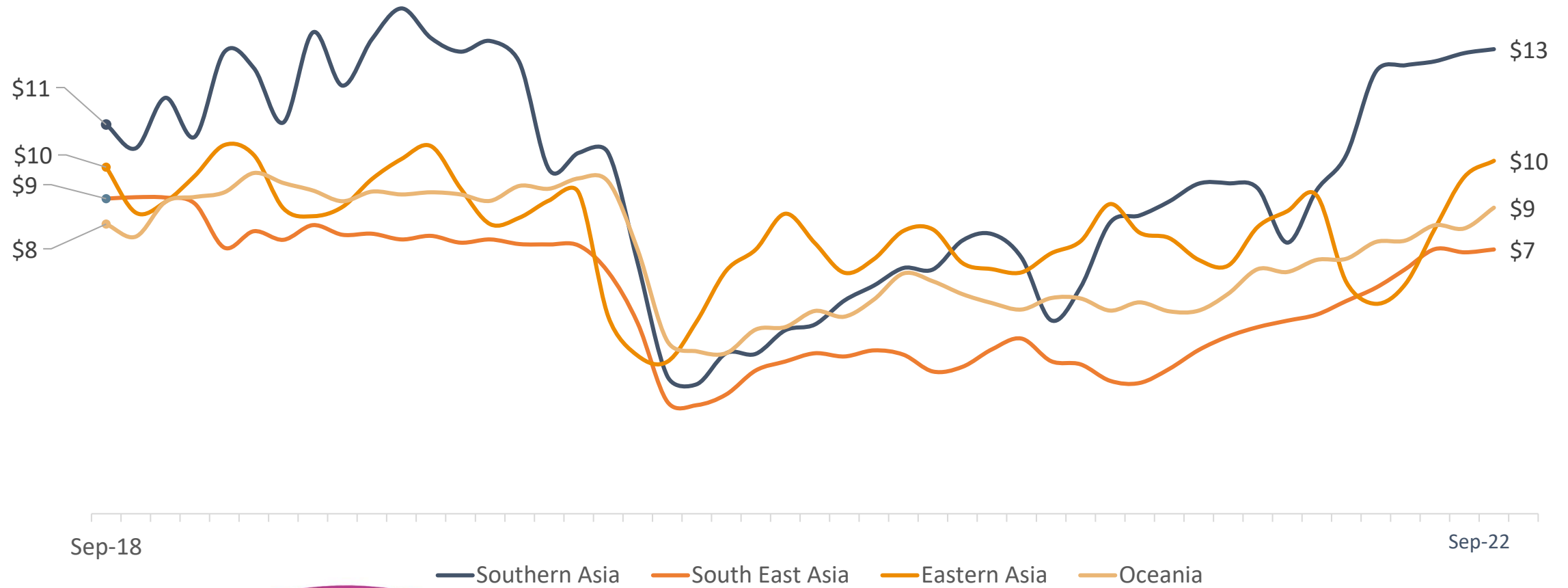
# Energy's Rising

Utilities Per Available Room

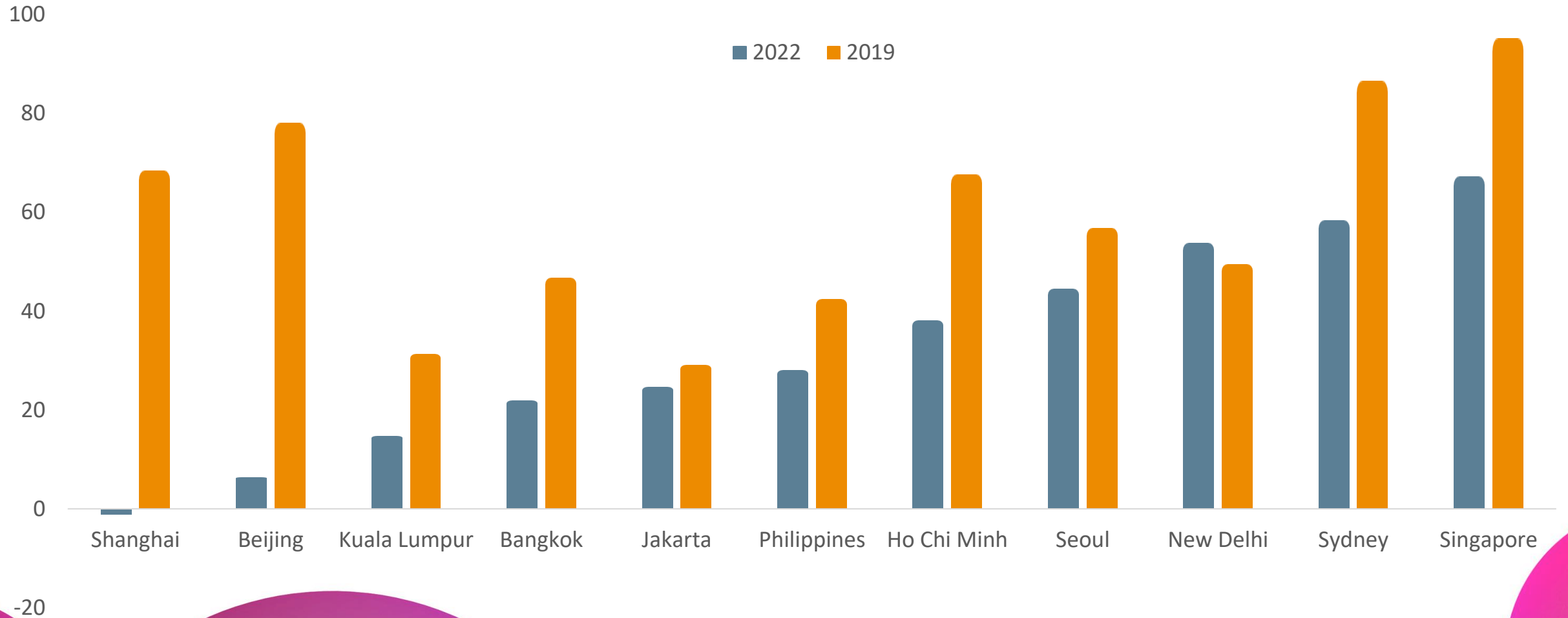


# Energy's Rising

Utilities Per Available Room



## Variance vs Same Time 2019– Gross Operating Profit Per Available Room



- Majority of APAC recovery far behind Europe, Middle East and US
- Many key markets still have more than 20% gap in TrevPAR
- Resorts leading return of demand
- Inflation evident in some of the key cost areas but hotels have been forced into efficiency savings
- Energy costs are ramping up around the world, countries in APAC also seeing early signs

