

HTLroundtable australia	australia	online (02.02.2021)	13 participants
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supply

667 properties; 134,324 rooms¹

BRANDED ROOMS



CHAIN AFFILIATED ROOMS



GROUP / BRAND PROFILE

- strongest brand: **Mantra**
- strongest group: **Accor**
- fastest growing brand: **Crowne Plaza**
- fastest growing group: **IHG**
- strongest regional brand (global presence): **Rydges**
- fastest growing regional brand: **Vibe**

pipeline

94 properties; 20,152 rooms^{1,2}

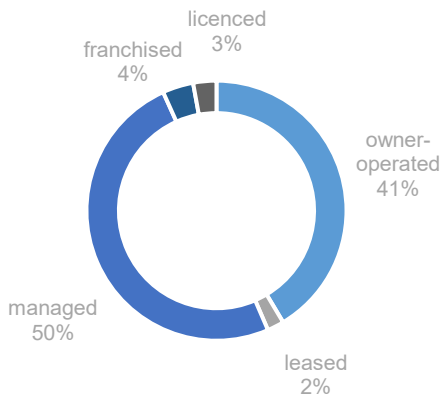


SELECTED OPENINGS of 2020

- Holiday Inn Express Melbourne Southbank, Melbourne, **345 rooms**
- Crowne Plaza Adelaide, Adelaide, **329 rooms**
- Flynn, a Crystalbrook Collection Hotel, Cairns, **311 rooms**
- Holiday Inn Express Sydney Airport, Sydney, **247 rooms**

hotel contracts

179 properties; 38,751 rooms under contract^{2,3,4}



key takeaways

- The regional destinations saw progressive growth in demand, in particular during the festive season, which surpassed the demand in 2019, as interstate travel was allowed.
- The ADR has shown resilience in regional locations (e.g. the Sunshine Coast, NSW Mid North Coast, and NSW Northern Rivers) and in some cases surpassed 2019 levels.
- Larger cities underperformed compared to regional cities. In particularly Sydney, typically the country's best performing market, saw the greatest RevPAR percentage decline.
- Drive-to destinations have seen some of the best performance as travellers opt for modes of transport which are perceived as being safer.
- Future demand is indicatively leisure-oriented in the capital cities with slow recovery in corporate demand.
- The current pipeline still exists, but the construction period will likely be stretched out, consequently, deferring the initially planned opening.

HTLpartners



HTLroundtables around the globe



learn more and find the HTLroundtables schedule at

www.pkfhotels.com

NOTES:

1) calculated as per PKF sample; includes all properties with at least 100 rooms; 2) as per 31 December 2020; 3) as per the PKF contract database 4) from the viewpoint of hotel groups