



Hotel Performance Updates: Bali + more

HSMIAI Revenue Optimisation Workshop – Bali

28 October 2016



Horwath HTL™

Hotel, Tourism and Leisure

Overview of discussion:

Macro Tourism Snapshot + Pipeline

STR Performance Snapshot

- YTD August 2016: Jakarta, Bali, Bandung, Yogyakarta, Surabaya
- YTD August 2016: Bali by area
- YTD August 2016: Bali by class



Bali: Reservations & Sales Statistics YE 2015

- Composition of Advanced Bookings
- Market Mix
- Ave Length of Stay & Double Occupancy Factor
- Ave Proportion of Return Guests
- Ave No. Days at 100% Occupancy



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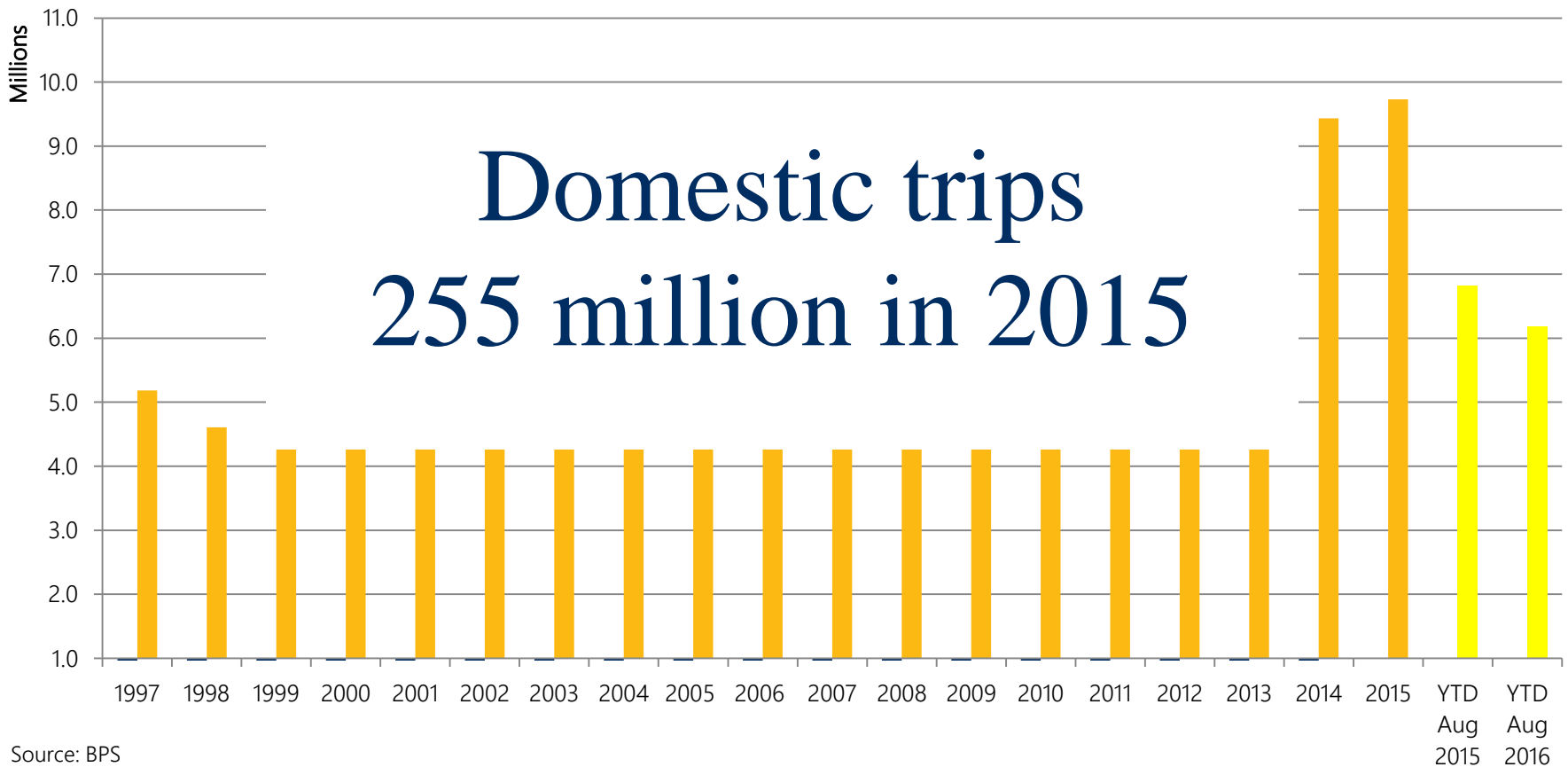
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Macro Tourism Snapshot: Demand

5 yr. CAAG	8%
10 yr. CAAG	6%
15 yr. CAAG	5%
YOY Aug 2016	-9%

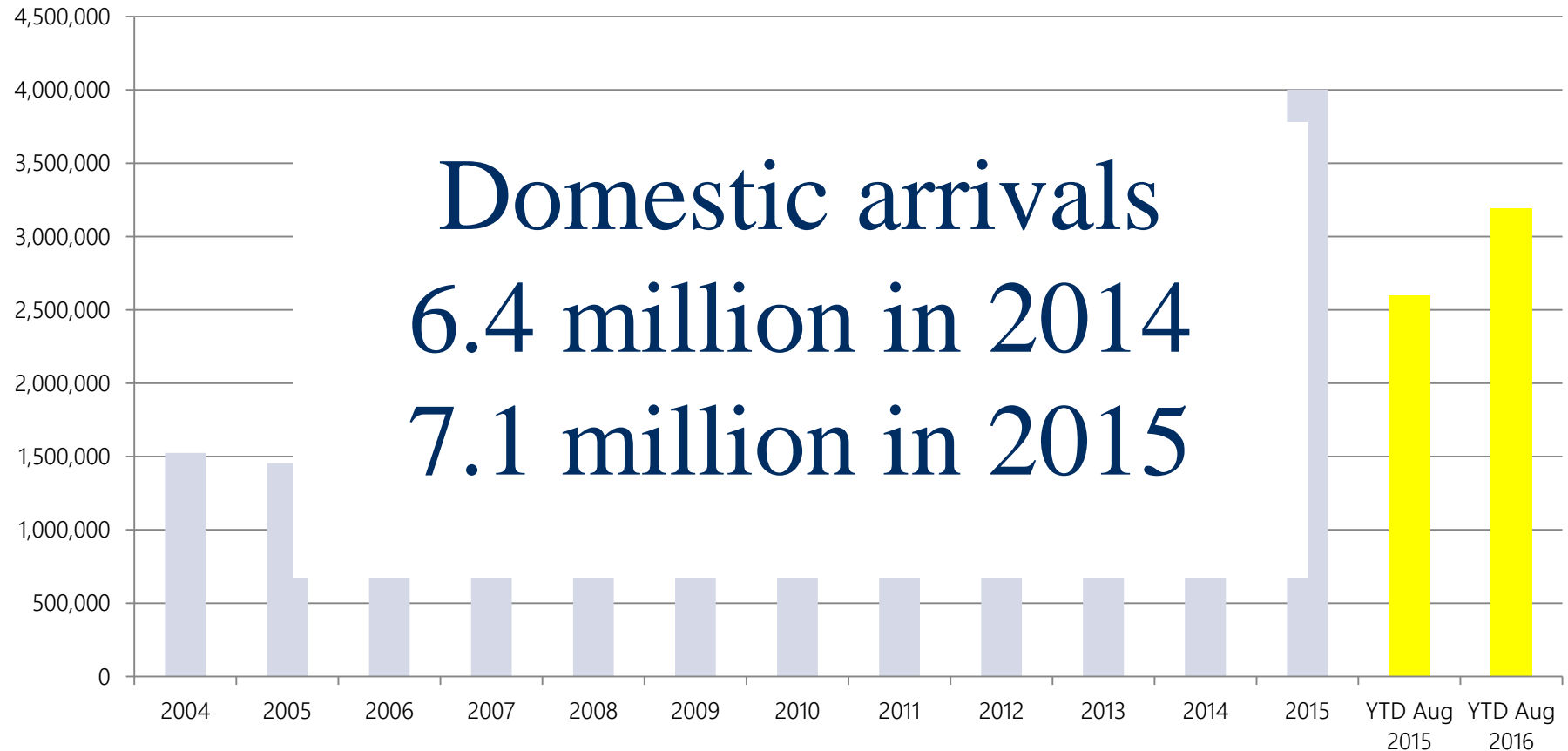
Foreign Arrivals to Indonesia: YTD August 2016



Macro Tourism Snapshot (Demand)

5 yr. CAAG	10%
10 yr. CAAG	11%
YOY Aug 2016	23%

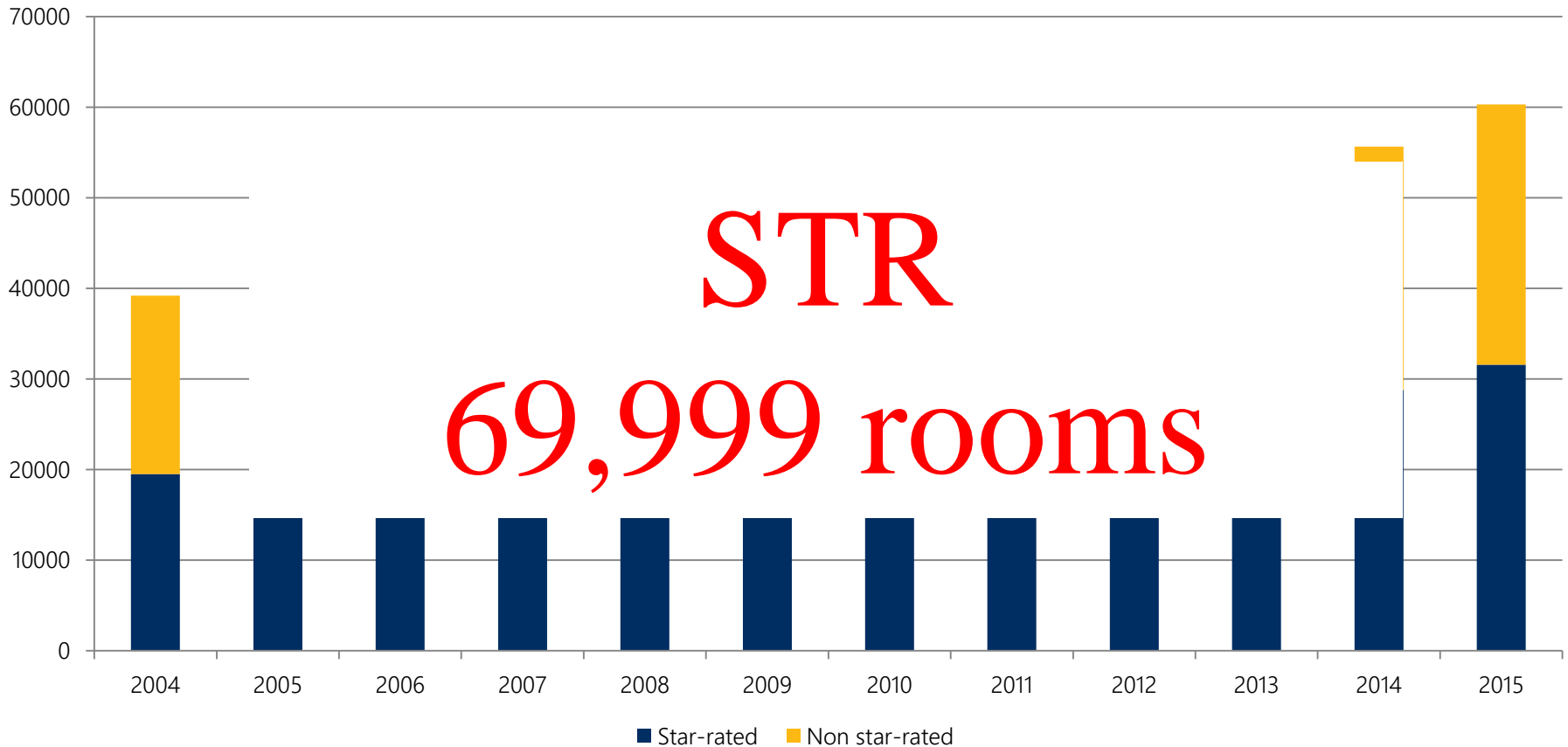
Foreign Arrivals to Bali: YTD August 2016



Macro Tourism Snapshot (Supply)

5 yr. CAAG	7%
10 yr. CAAG	4%
Star v Non Star	52% (43%)

Hotel Rooms Bali: 2004 to 2015

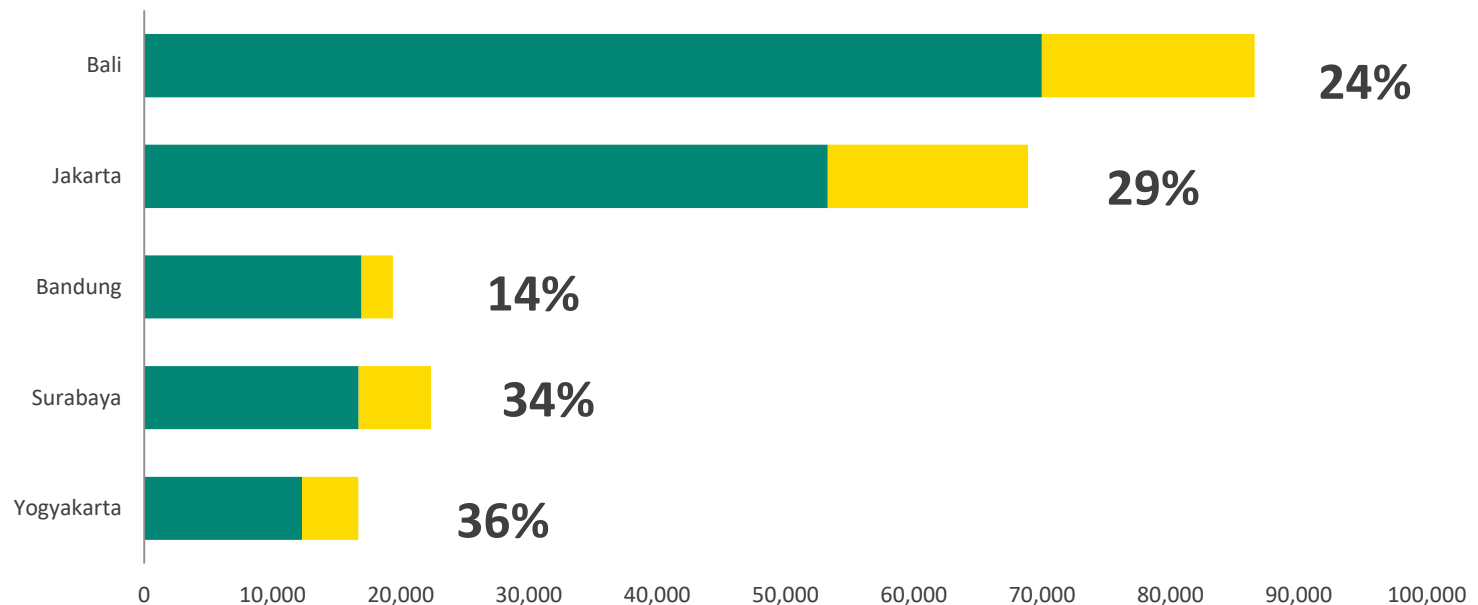


INDONESIA – Hotel Pipeline Under Contract



Top 5 Markets by Total Numbers of Rooms

Existing Supply Under Contract Pipeline



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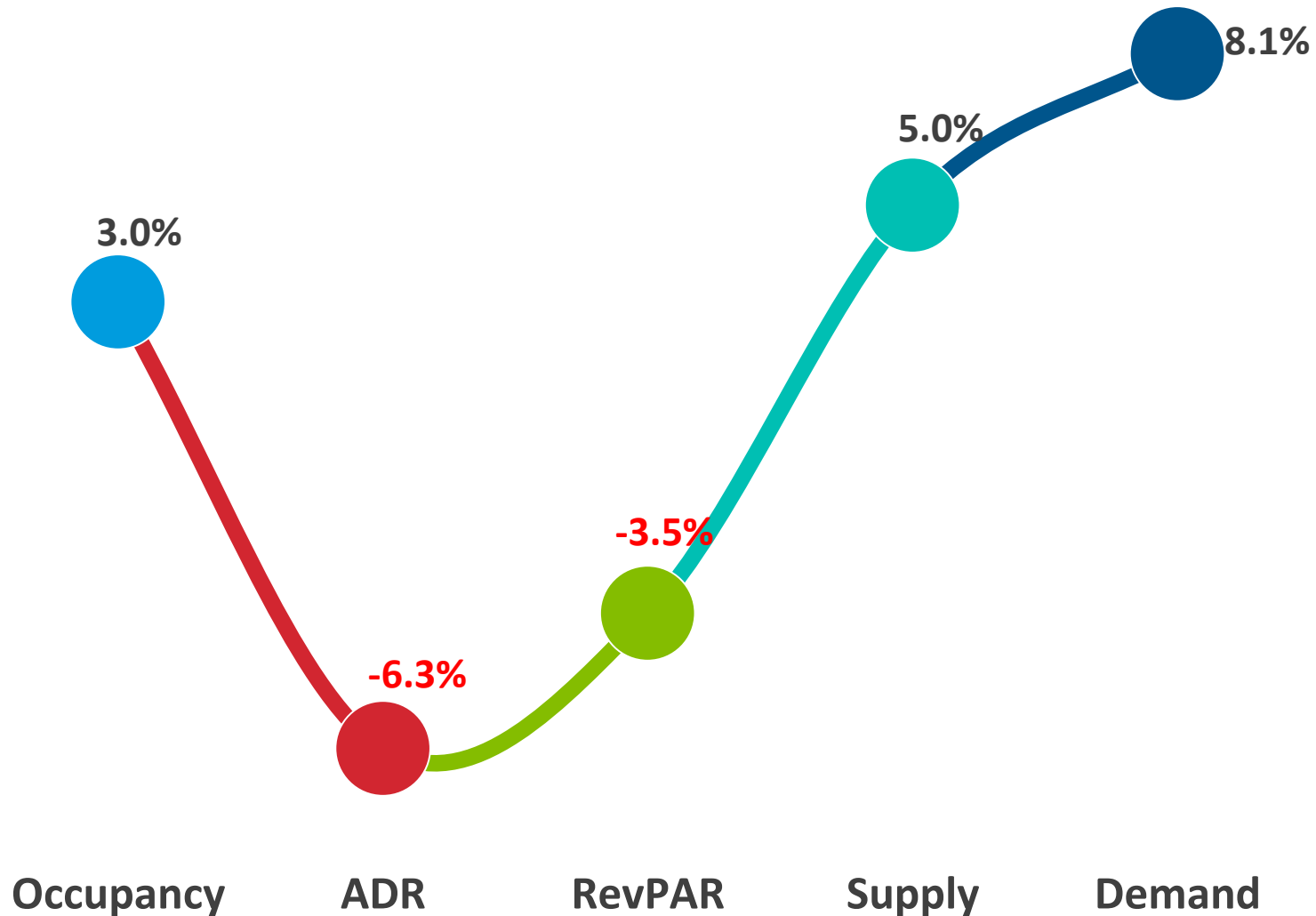
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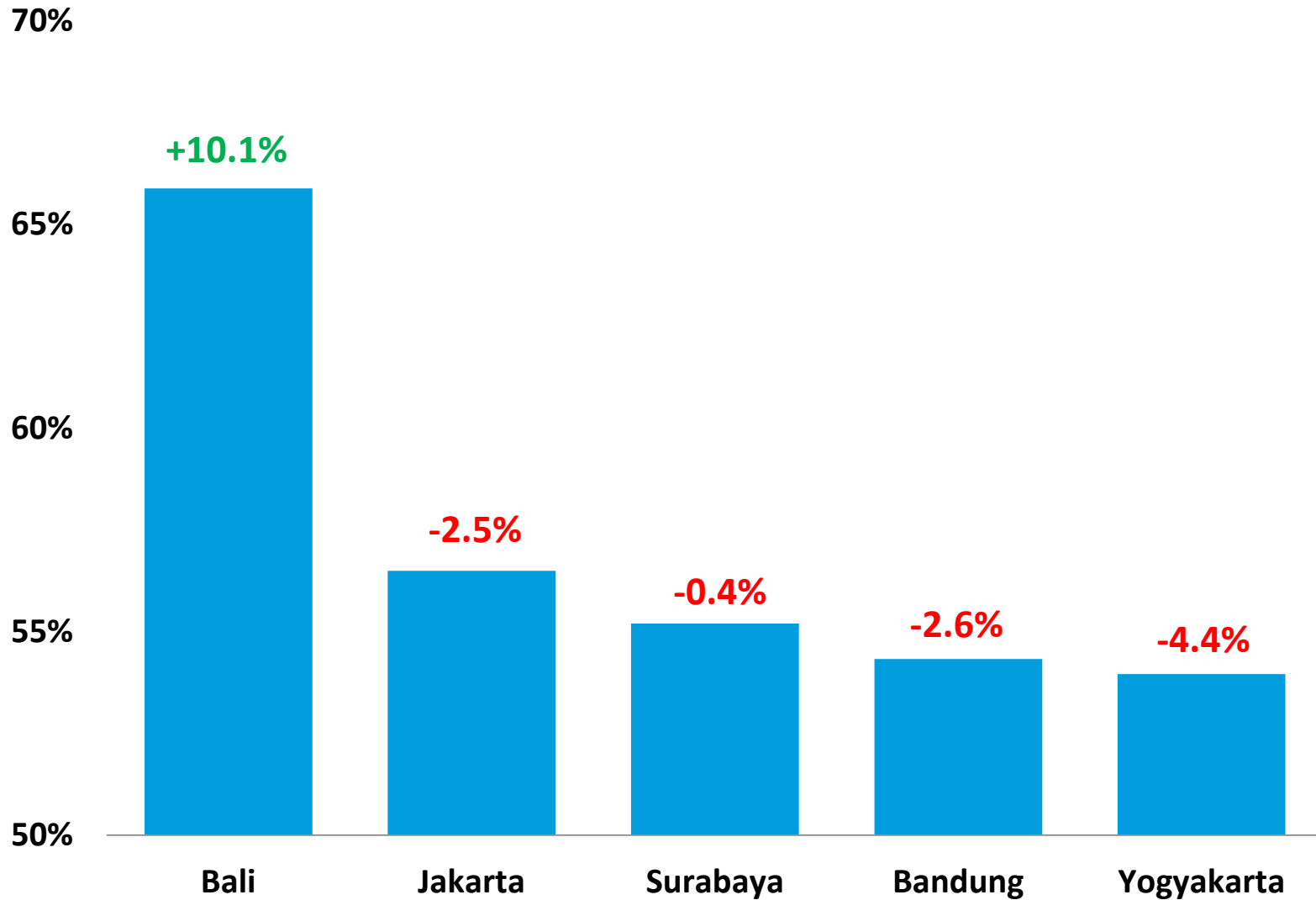


INDONESIA – Main KPIs % Change, August 2016 YTD

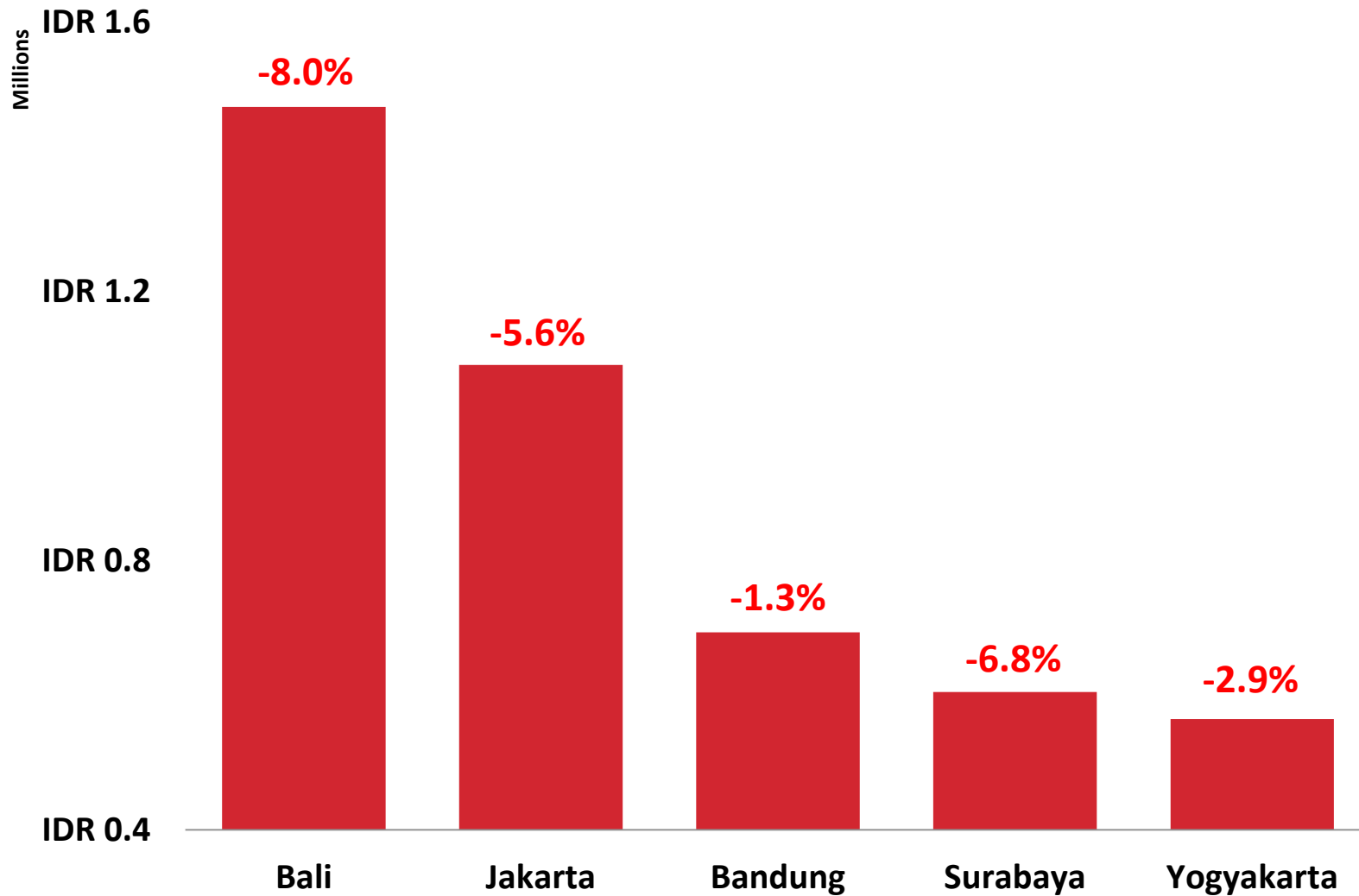
What's driving growth?



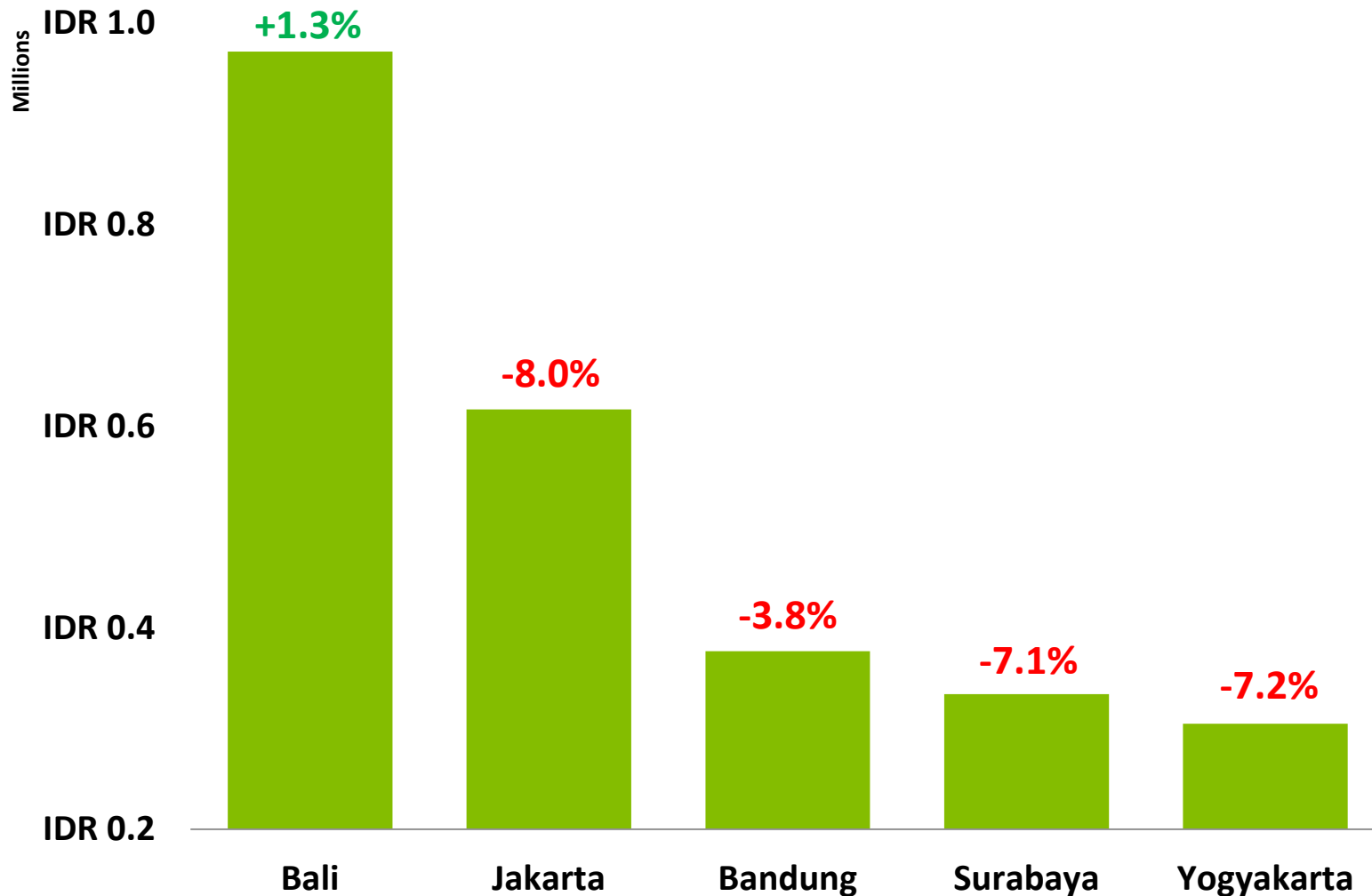
Key Cities Performance – Occ % Change August 2016 YTD



Key Cities Performance – ADR % Change August 2016 YTD



Key Cities Performance – RevPAR % Change August 2016 YTD



BALI – August 2016 YTD



68.8%

Occupancy
+10.2%

IDR 1,476,200

ADR
-8.2%

IDR 972,000

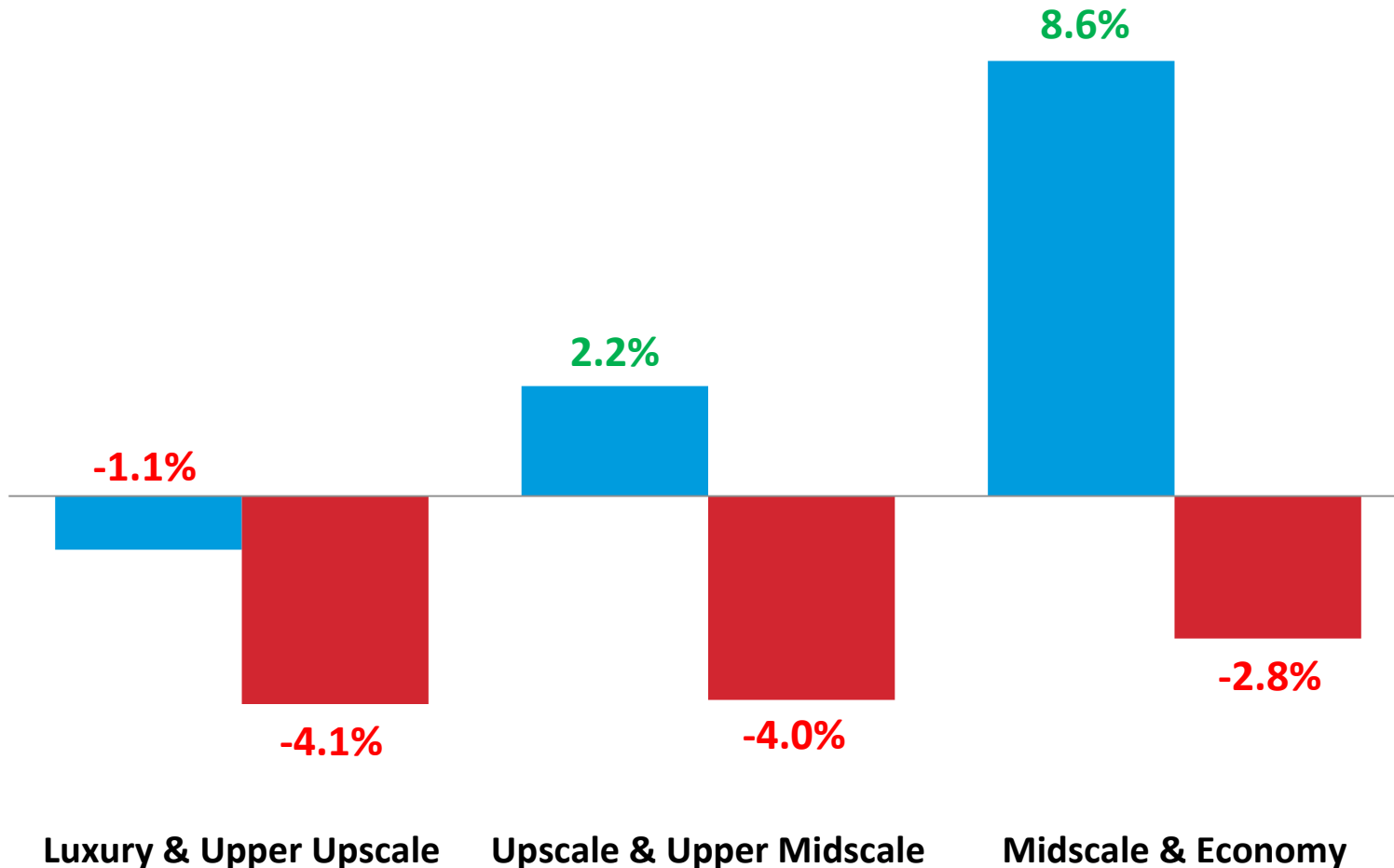
RevPAR
+1.1%

BALI Hotel Performance Occ & ADR Growth – Collapsed Class

August 2016 YTD

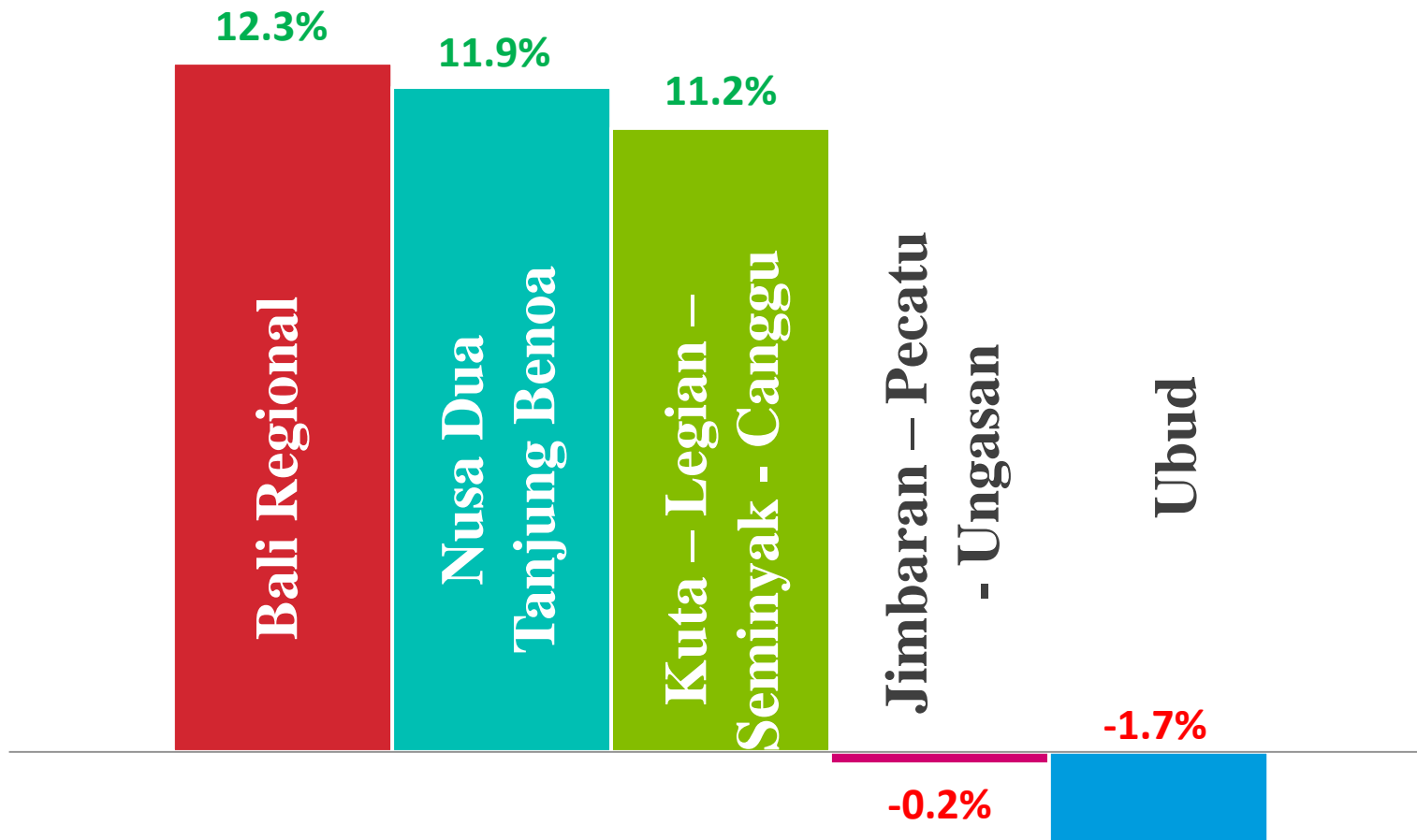


■ Occupancy ■ ADR



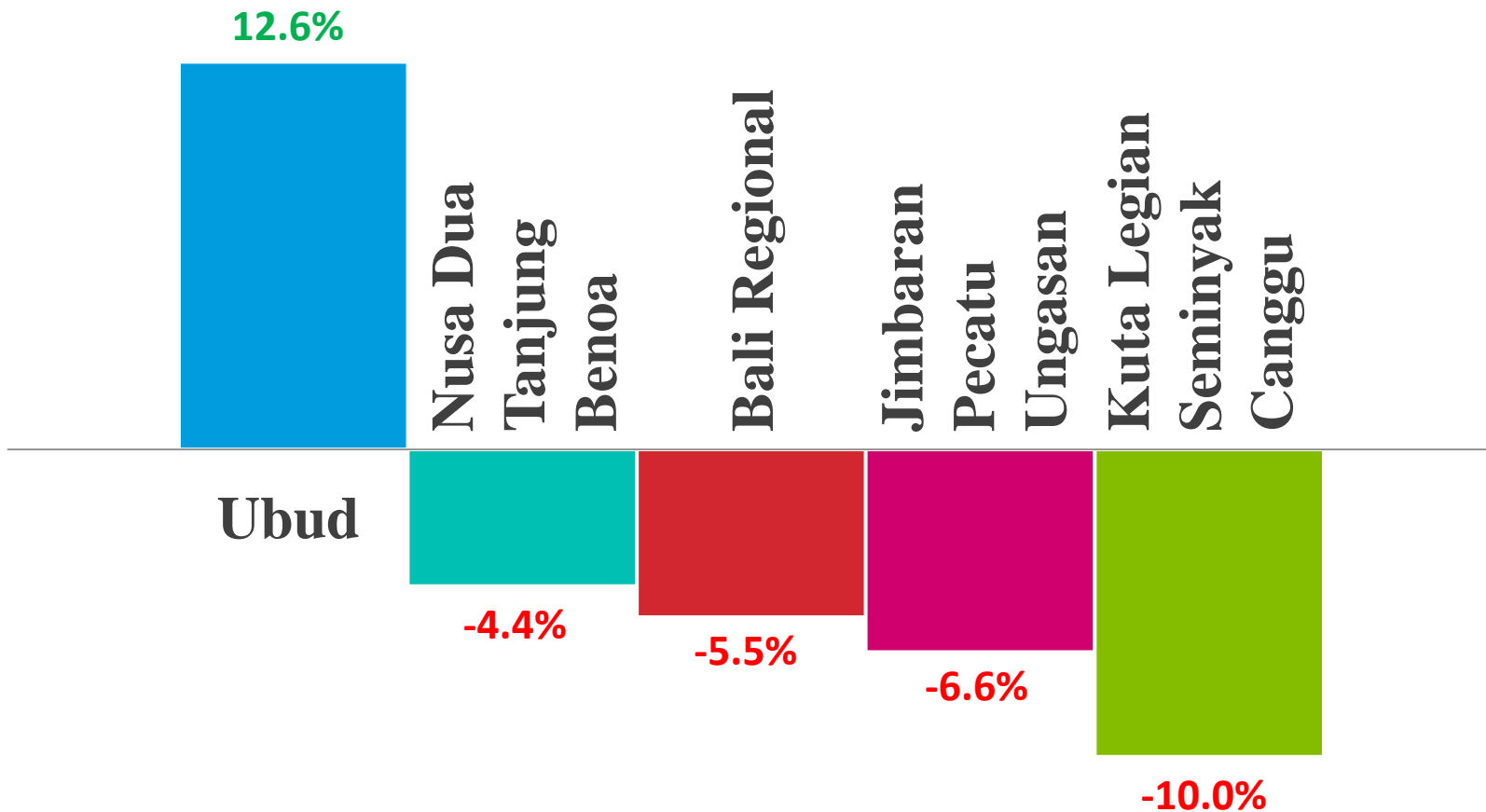
BALI Hotel Performance Submarket Occ Growth

August 2016 YTD



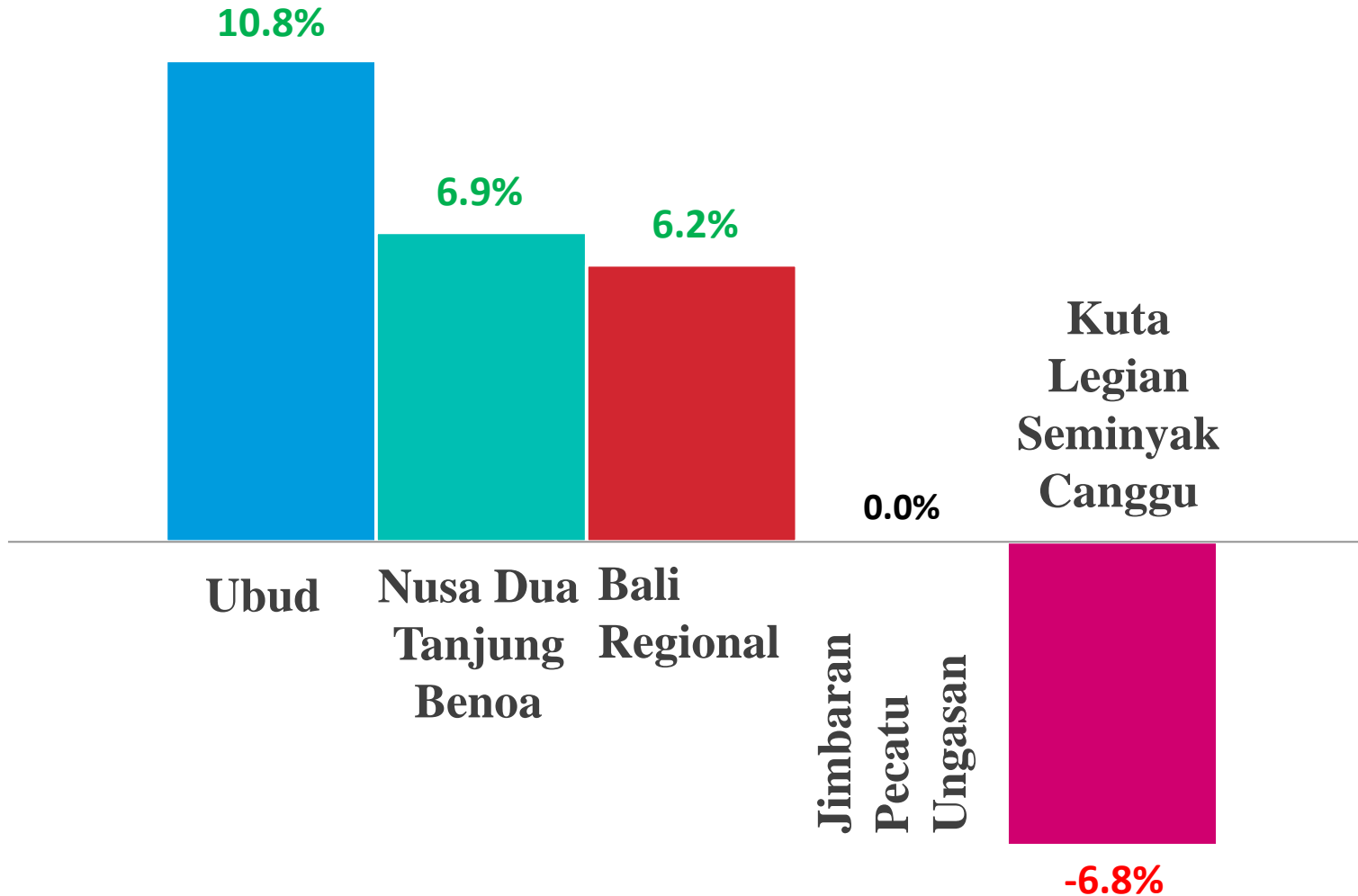
BALI Hotel Performance Submarket ADR Growth

August 2016 YTD



BALI Hotel Performance Submarket RevPAR Growth

August 2016 YTD



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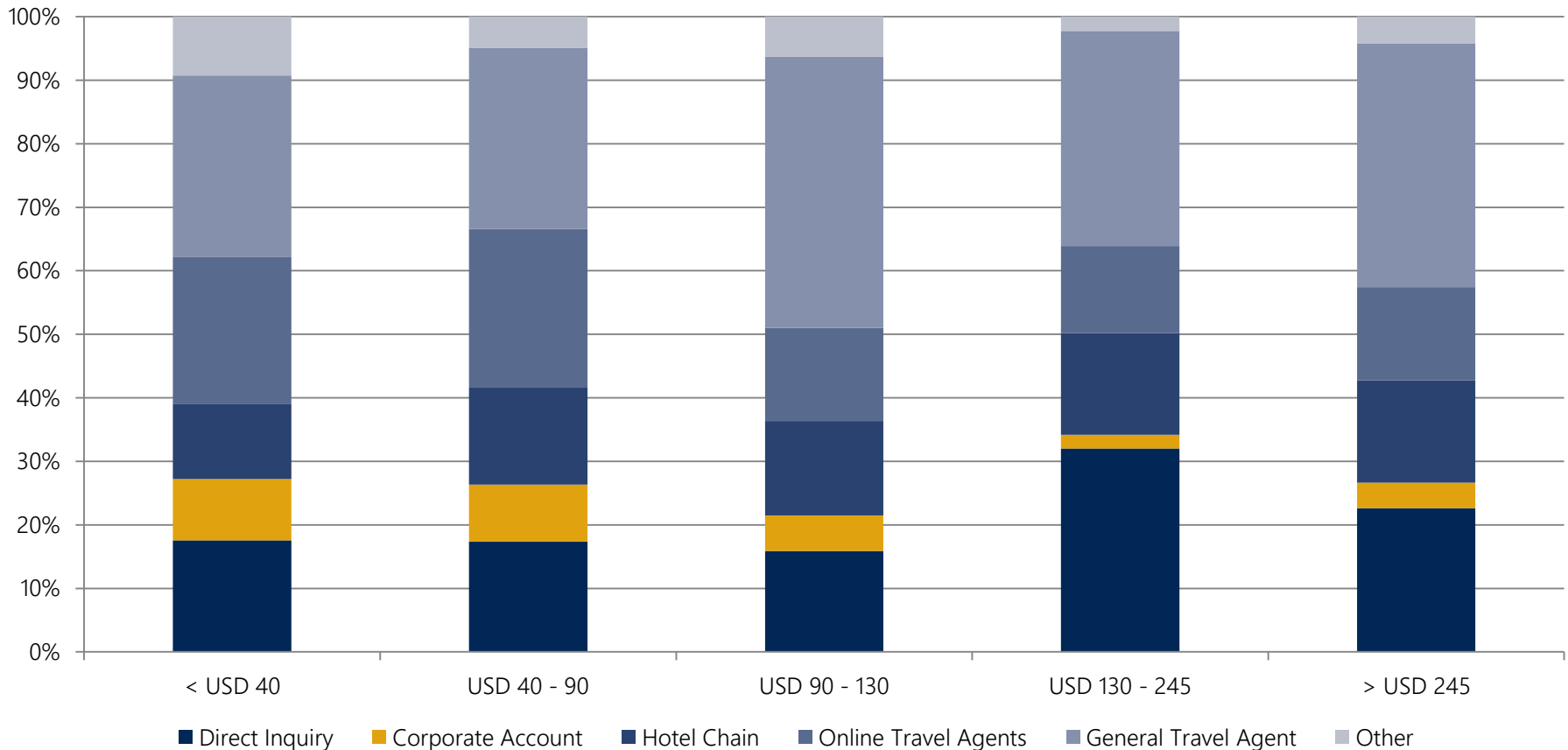
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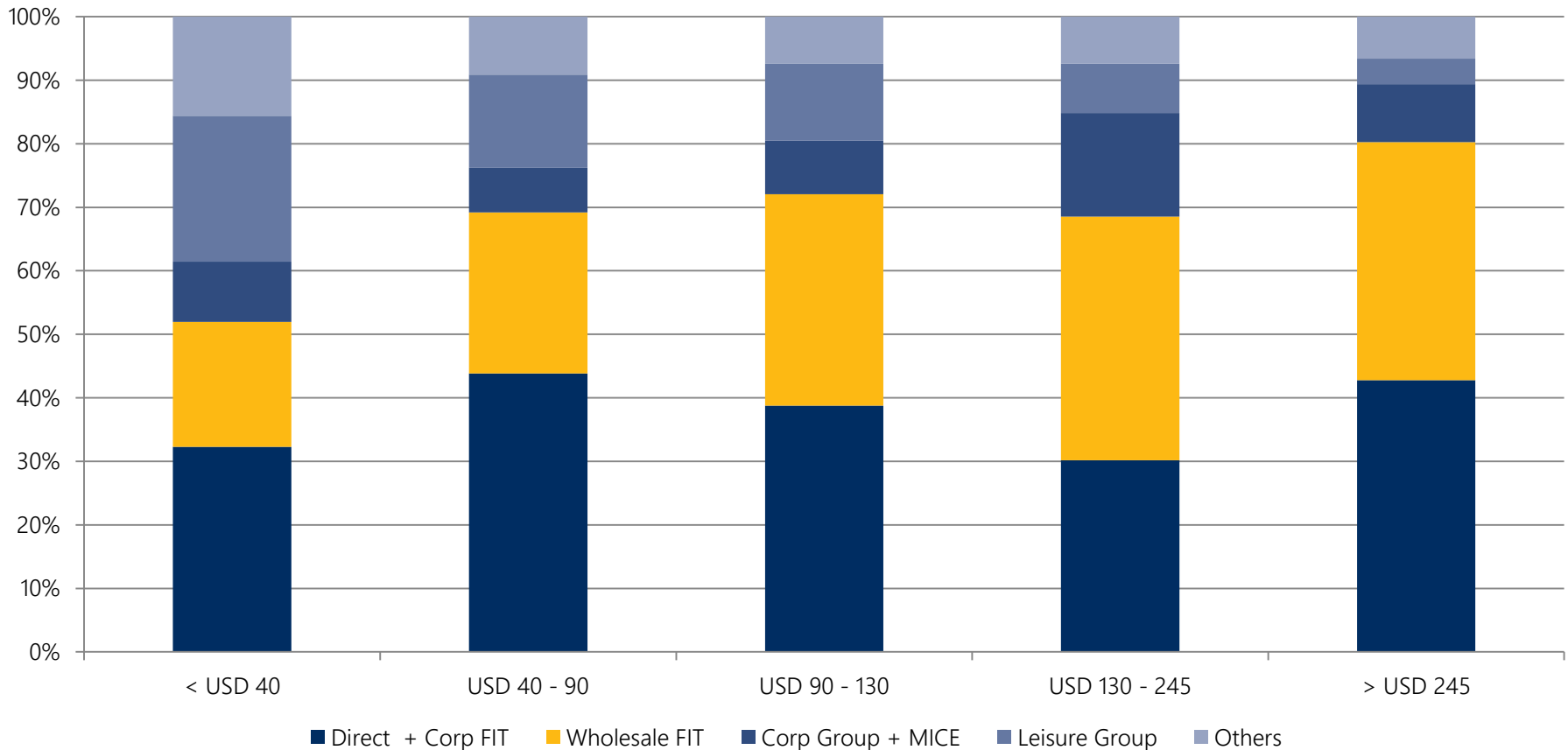
Bali: Reservations & Sales Trends

Composition of Advanced Bookings: 2015



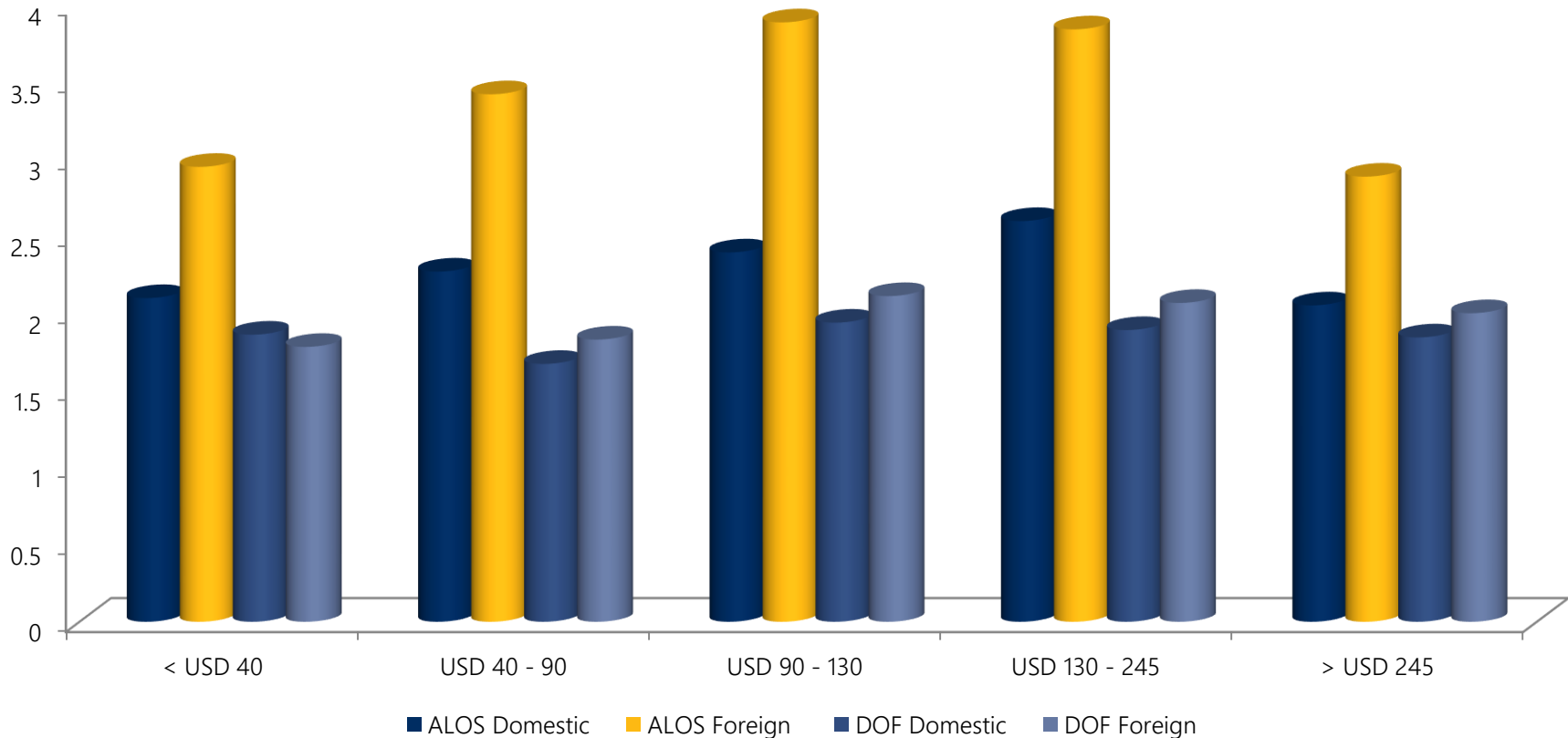
Bali: Reservations & Sales Trends

Market Mix: 2015



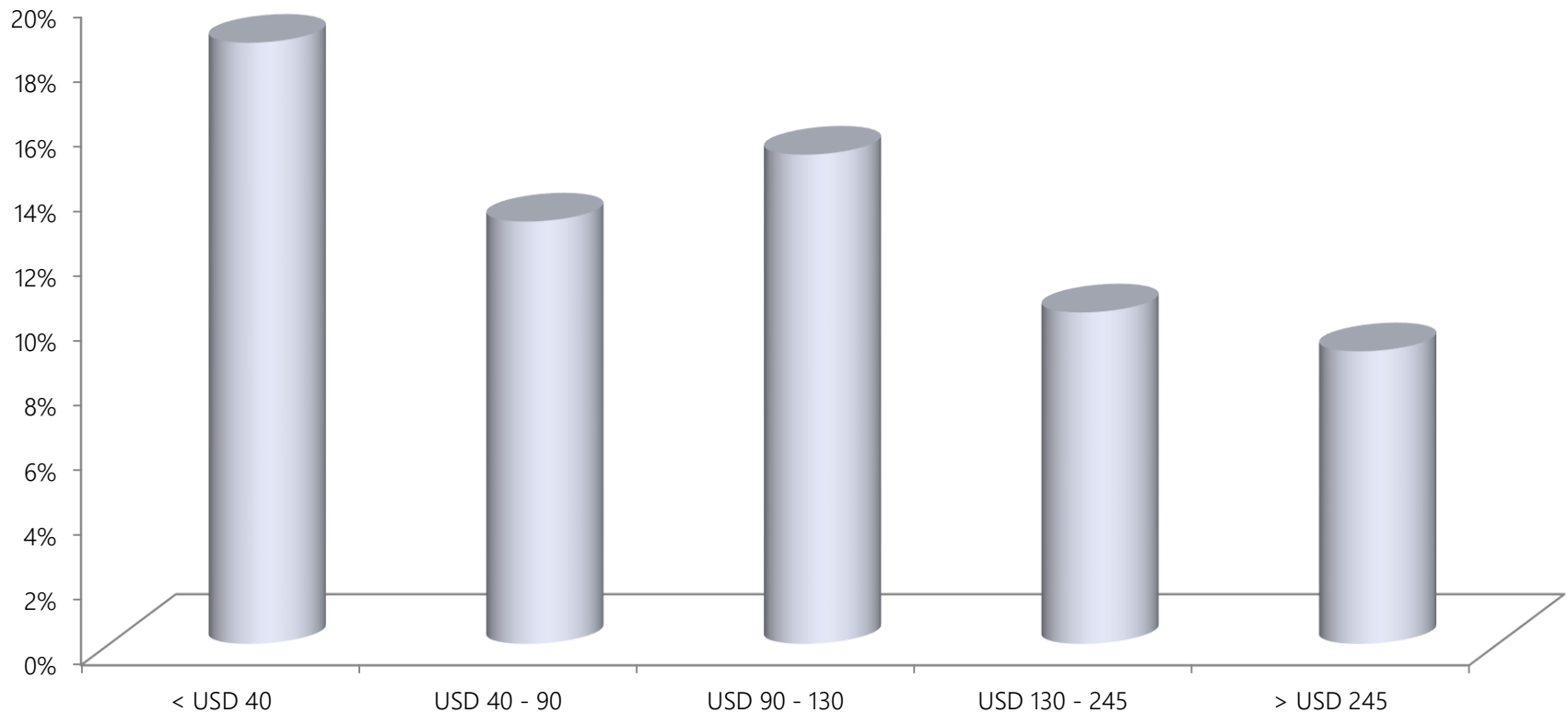
Bali: Reservations & Sales Trends

Average Length of Stay & Double Occupancy Factor 2015



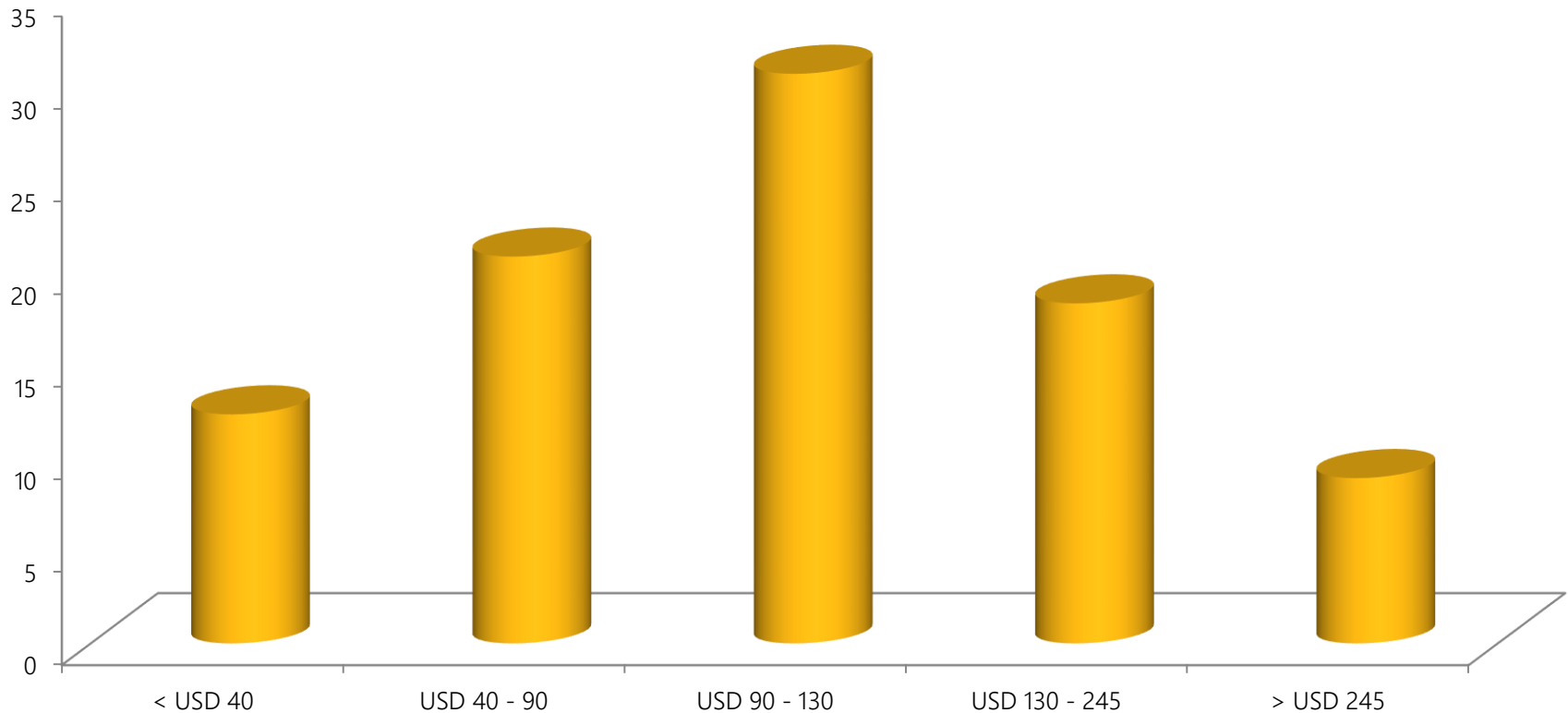
Bali: Reservations & Sales Trends

Percentage of Return Guests 2015



Bali: Reservations & Sales Trends

Ave Number of Days at 100% Occupancy: 2015



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