



Indonesia Performance Highlights

Hospitality Highlights, Jakarta
13 July 2017

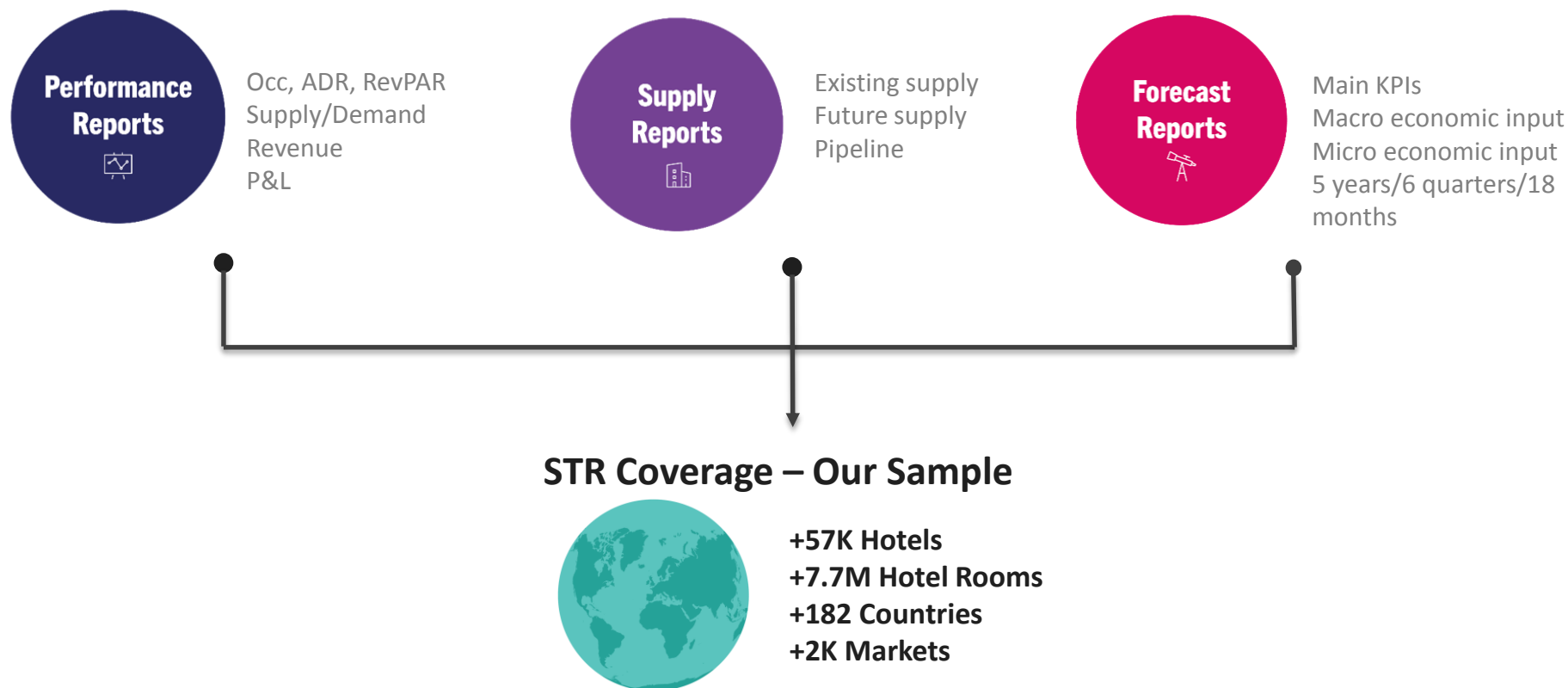
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STR, collecting data since 1985



Asia Pacific – RevPAR % Change

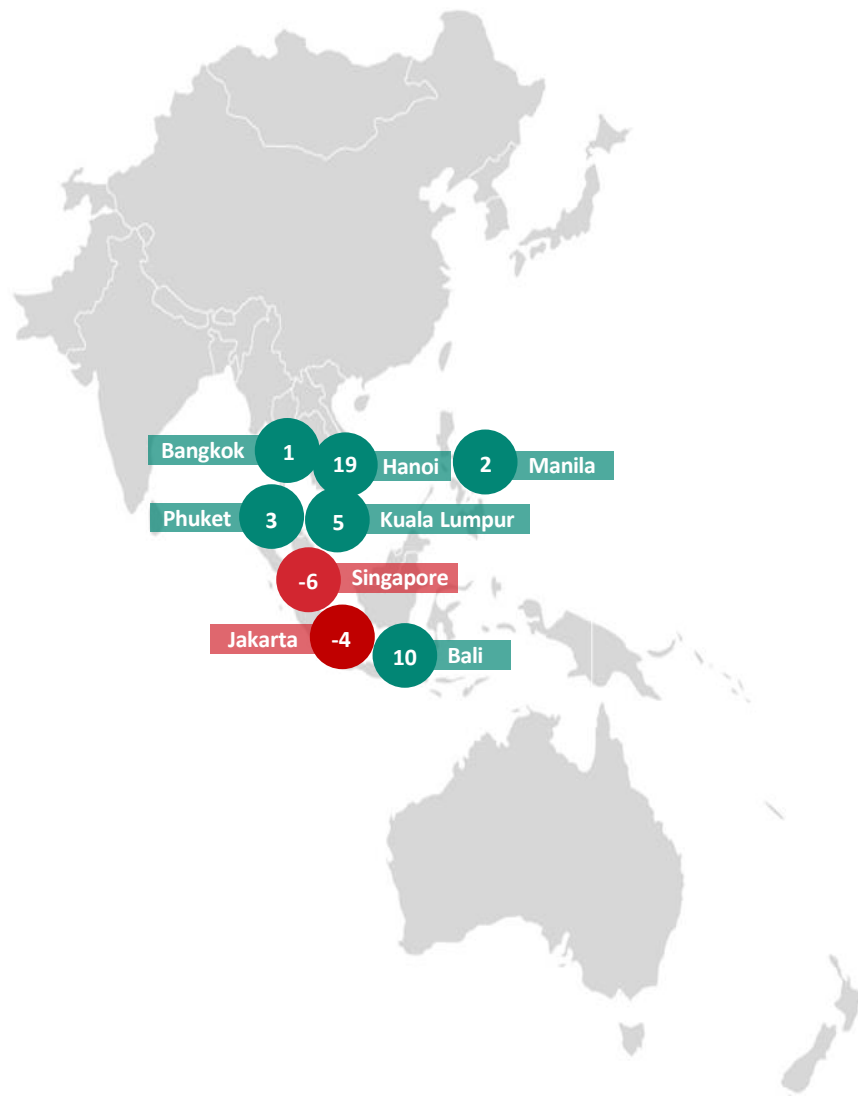
LC, May 2017 YTD



16 markets +
7 markets -

SEA – RevPAR % Change

LC, May 2017 YTD

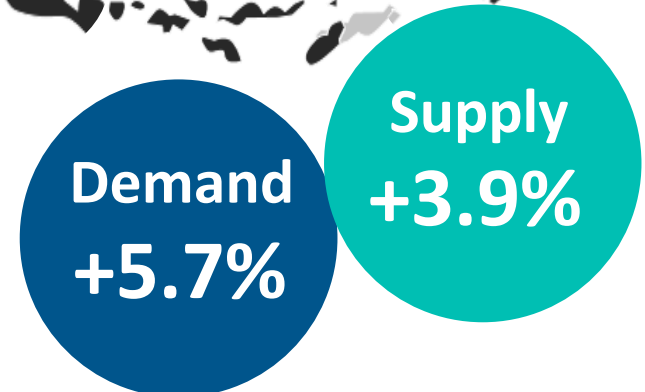
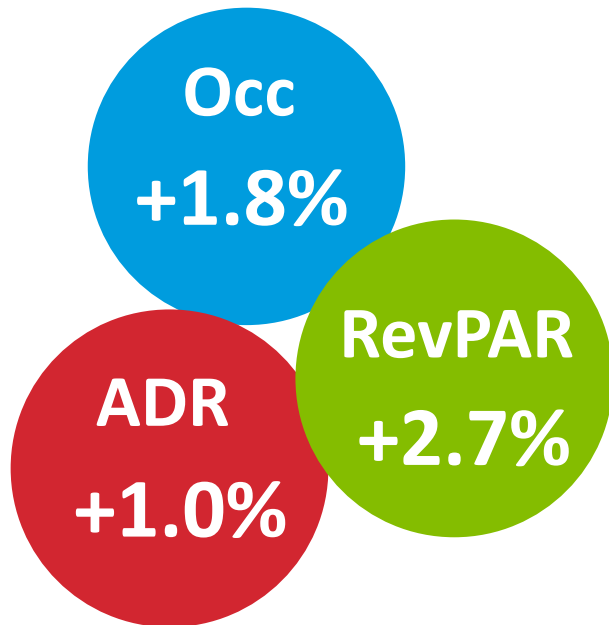




INDONESIA

81,168 rooms
participants

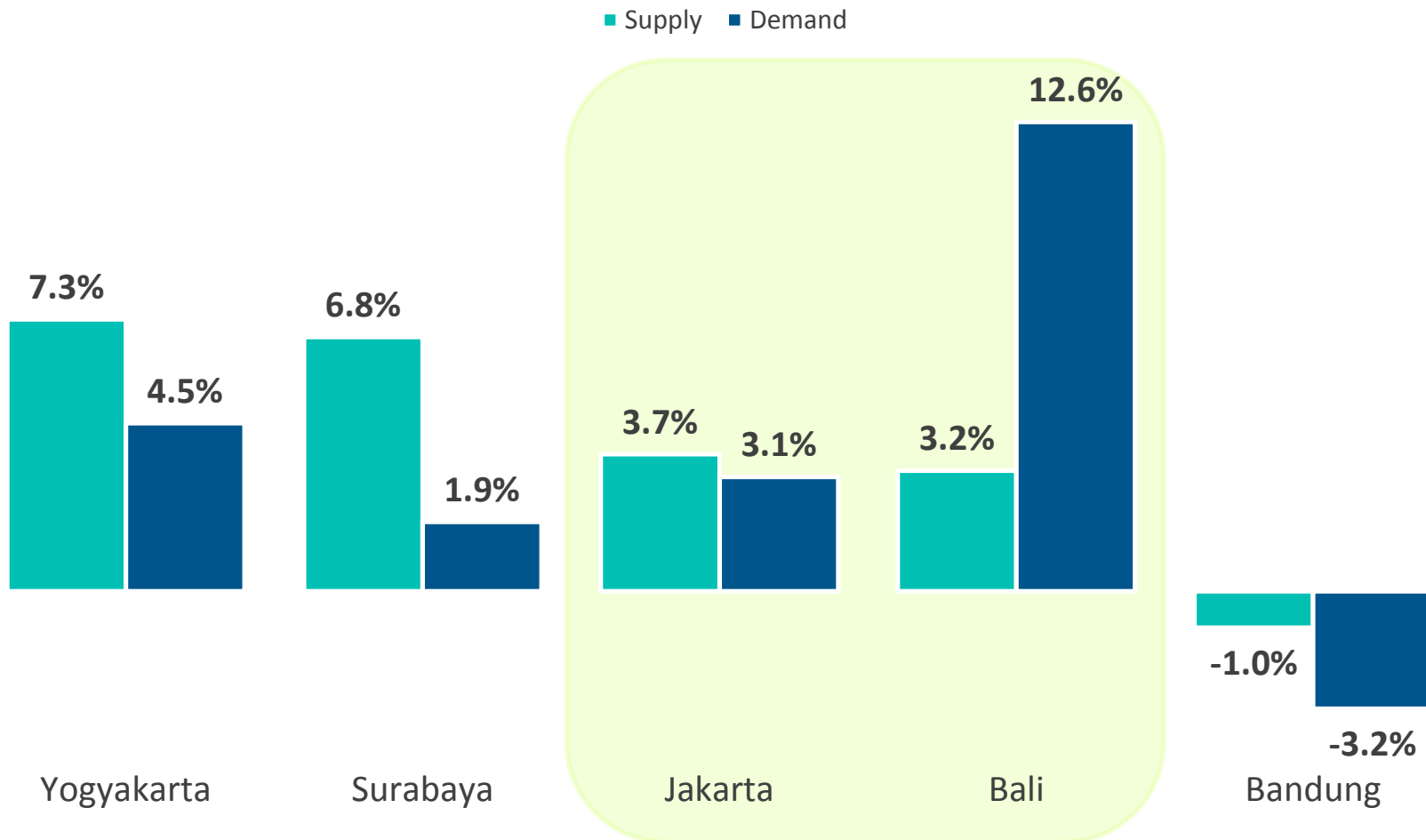
Main KPIs % Change
What's driving growth?
YTD May 2017
IDR



Indonesia's Key Markets Performance

Supply and Demand Growth

YTD May 2017, IDR

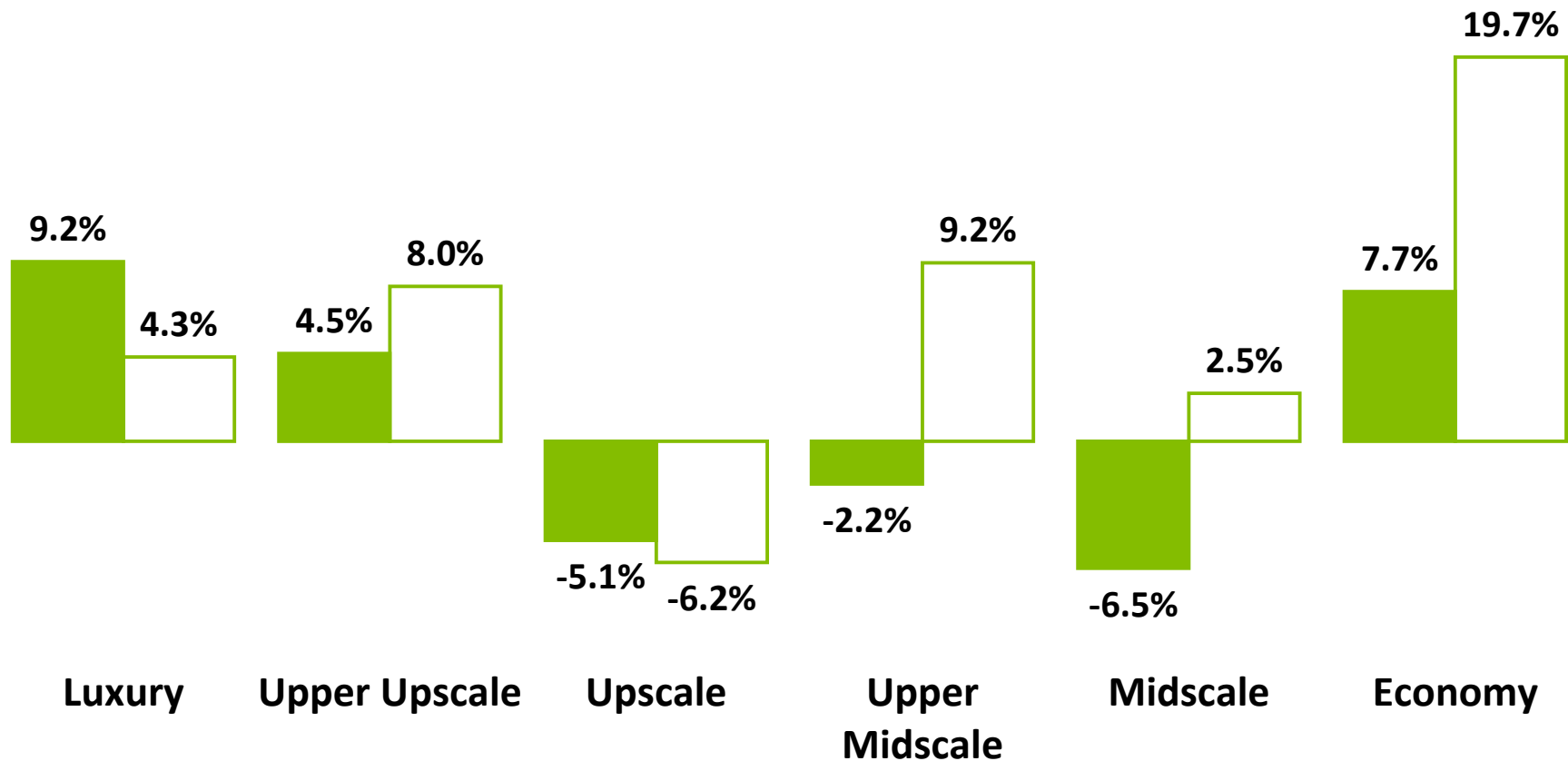


INDONESIA – RevPAR % Change

Branded vs. Unbranded by Class, IDR, YTD May 2017



■ RevPAR %Chg Branded □ RevPAR %Chg Unbranded



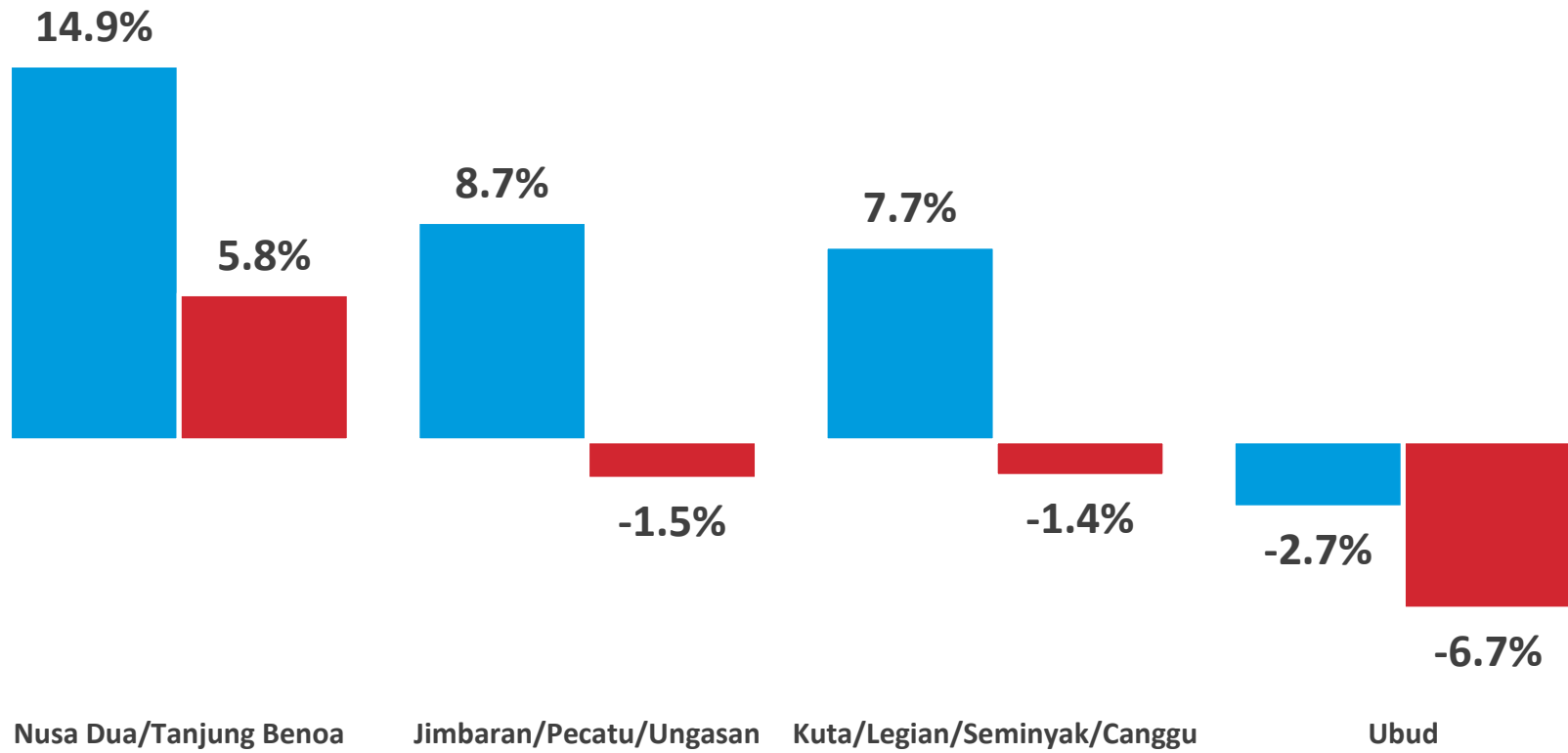
Bali Performance Highlights

Occupancy & ADR Growth per Areas

YTD May 2017, in Local Currency

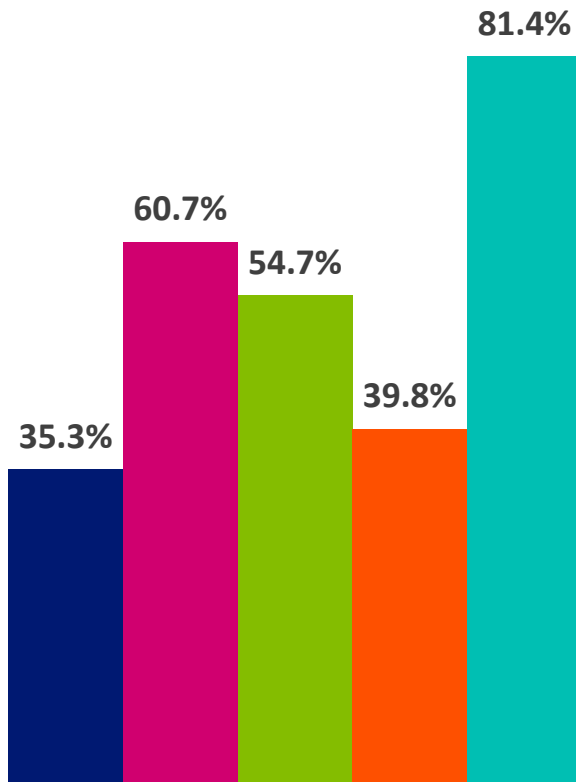


■ Occupancy ■ ADR

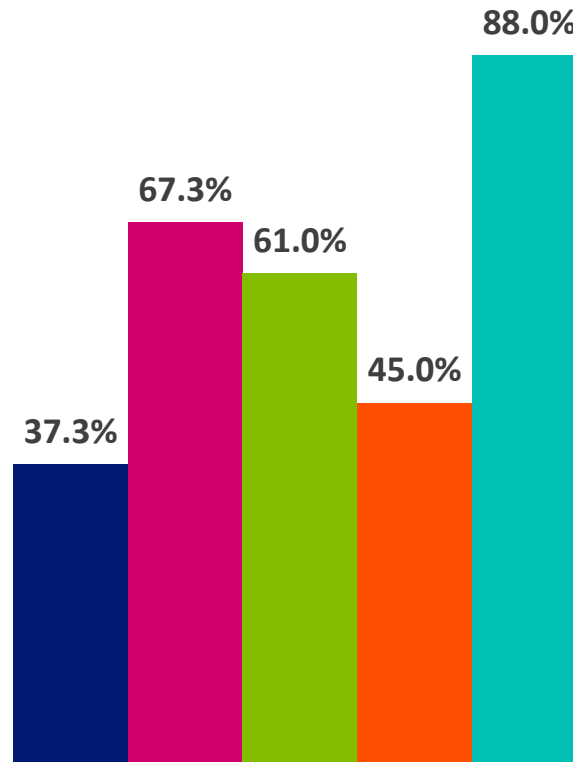




Events



2016



2017

Start Date: **June 23, 2017**

End Date: **July 2, 2017**

Start Date: **July 1, 2016**

End Date: **July 10, 2016**

Jakarta 24,990 rooms

Bandung 4,820 rooms

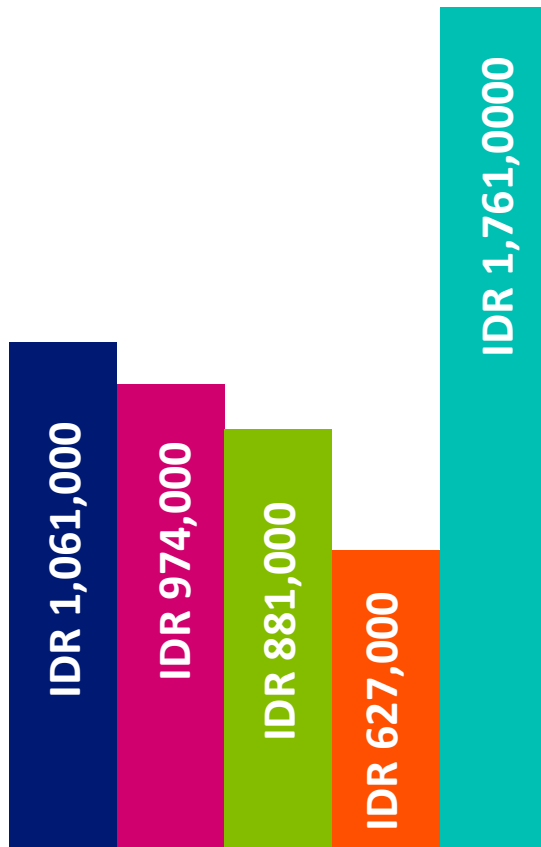
Yogyakarta 3,197 rooms

Surabaya 5,272 rooms

Bali 23,935 rooms



2016



2017

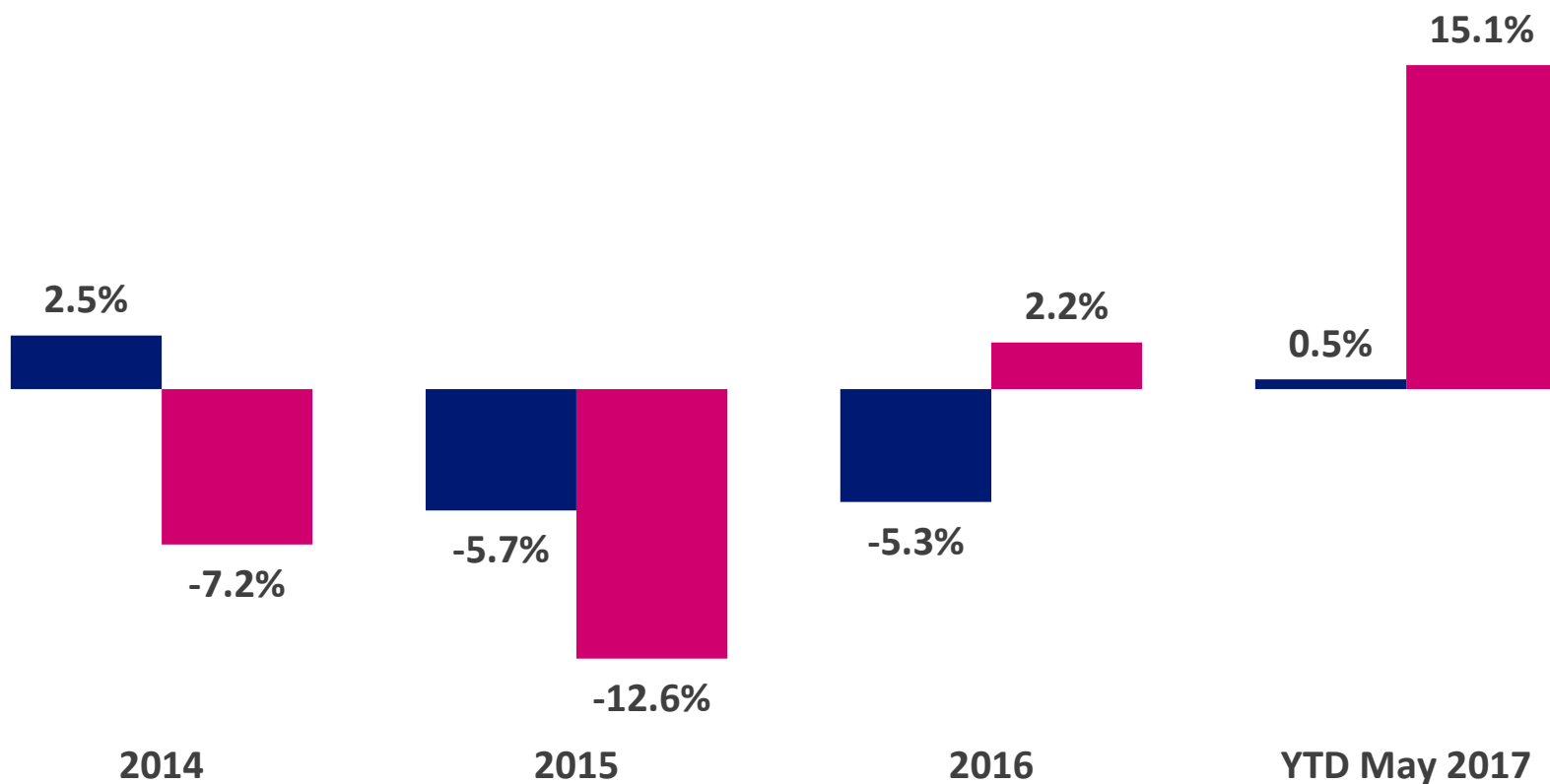
Start Date: **June 23, 2017**End Date: **July 2, 2017**Start Date: **July 1, 2016**End Date: **July 10, 2016****Jakarta** 24,990 rooms**Bandung** 4,820 rooms**Yogyakarta** 3,197 rooms**Surabaya** 5,272 rooms**Bali** 23,935 rooms

Indonesia – RevPAR % Change

Segmentation, LC, FY 2014 – FY 2016 + May 2017 YTD



■ Transient RevPAR % change ■ Group RevPAR % change





THE 4th ASEAN LITERARY FESTIVAL

Beyond Imagination

Jakarta, 3-6 August 2017

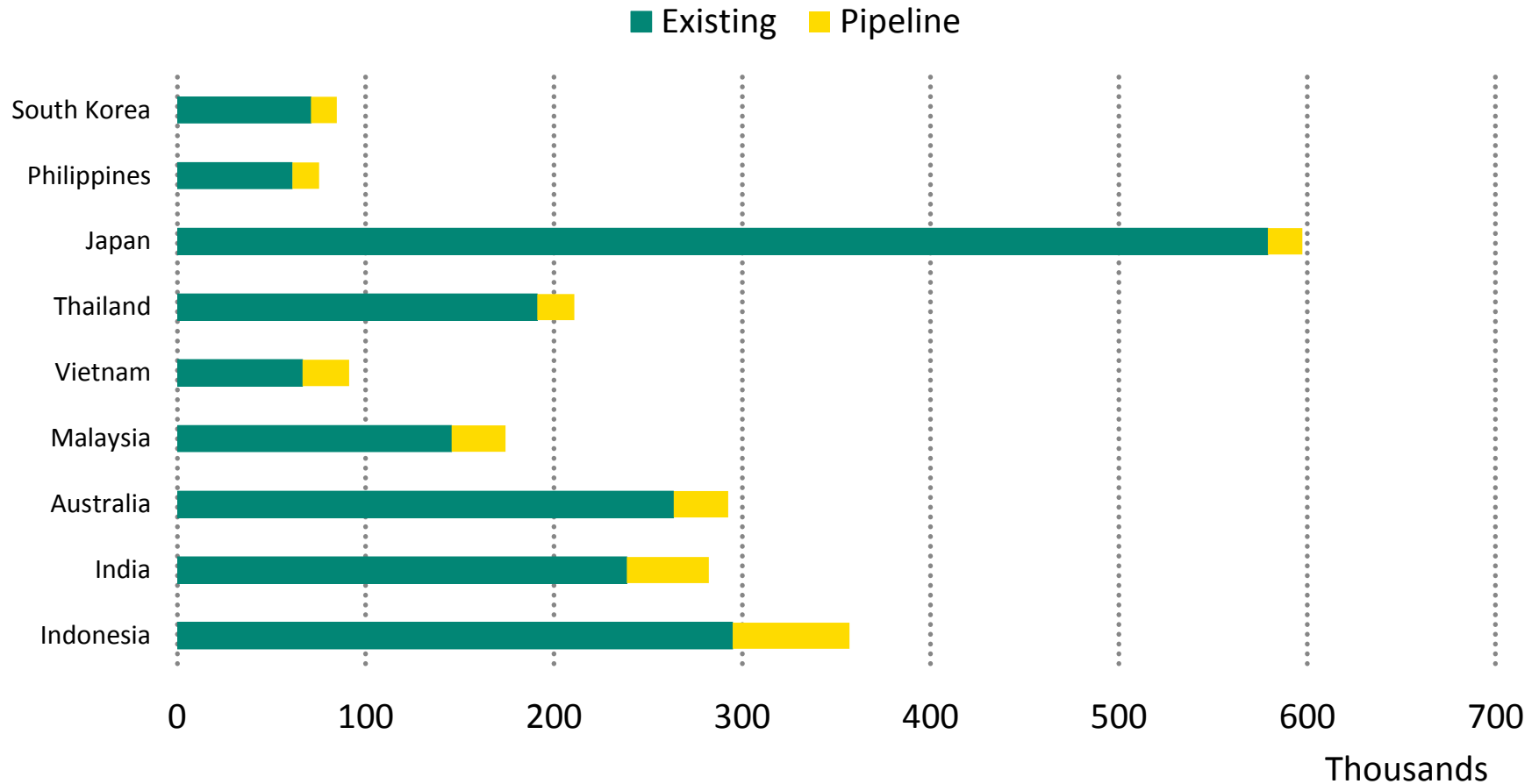


18th ASIAN GAMES
**Jakarta
Palembang
2018**



APAC – Pipeline, Top 10 (excl. China)

May 2017 Report, Pipeline by Room Count

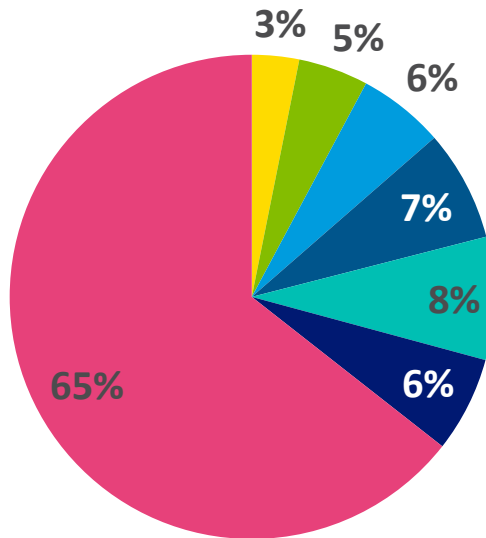


INDONESIA Supply & Pipeline Share – by Chain Scale

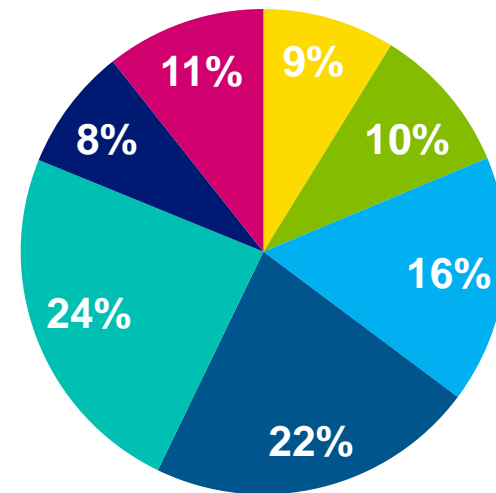
Existing & Pipeline Room Count Share, May 2017 Report



Existing (Class)



Pipeline (Under Contract)



■ Luxury ■ Upper Upscale ■ Upscale ■ Upper Midscale ■ Midscale ■ Economy ■ Unaffiliated



Joint Study

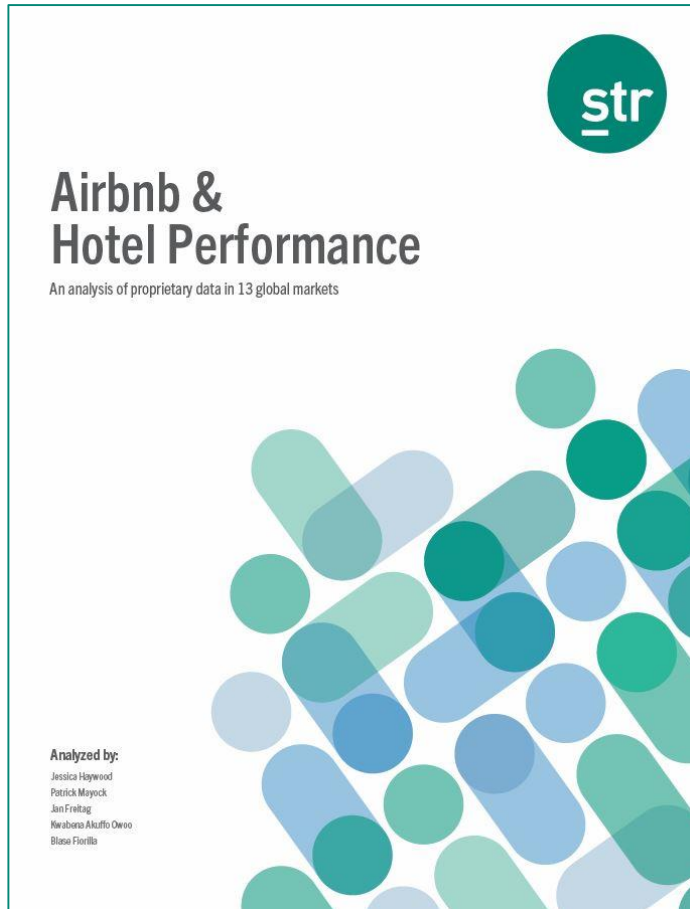
The influence of

Alternative Accommodations

(staying with friends and family, camping, home-sharing)

 **airbnb** - *a force in the travel industry*

- Legislative challenge
- Supply & Demand growth
- Hotels' growth was also strong
- Nuances
 - Length of Stay - Airbnb longer
 - Business travel - Much smaller than leisure
 - ADR & Occ - Hotel ADR/Occ higher
- Remember: Apples and Oranges



Download here:

<http://www.str.com/research1>

Markets included:

Boston
Los Angeles
Miami
New Orleans
San Francisco
Seattle
Washington, D.C.

Barcelona
London
Mexico City
Paris
Sydney
Tokyo



STR & Google

Can search results predict
hotel occupancy levels?

STR and Google have joined forces to research the correlation between accommodation search results and hotel bookings.



Questions?

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Benchmarking
↑ your world



Thank You!

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