

# PULSE

EDITION #2

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YOUR ONE SOURCE TO TRACK WHERE TRAVEL IS GOING IN THE NEW NORMAL

RateGain®

# WE HAVE COME A LONG WAY

FROM THE CEO'S DESK

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**HARMEET SINGH**

Chief Executive Officer

Since our inaugural edition of PULSE, a lot has changed in the world but none of it is a surprise or unexpected. The majority of the United States and Europe is once again under lockdown, as the United Kingdom battles a more aggressive strain of the virus. Yet again, our resilient industry is putting a fight to the crises for just a little longer as vaccines rollout across 17 different markets. In the words of Thomas Fuller “The night is the darkest before dawn”.

As you read this, close to 42 million vaccines have been deployed, with an average of 2.44 million vaccines a day being rolled out in countries like US, UAE, UK, China, Russia, Germany and India. While the vaccine rollout is limited to a few countries, it is important to note that the COVID19 vaccine is a great asset to foreign relations, as each of the countries manufacturing vaccines, are also providing it to their neighboring regions to help accelerate the inevitable resumption of trade, commerce, and investments. Lastly all countries look forward to welcoming new travelers.

While we had seen China experience higher levels of travel since September, in December we observed three more countries get close to surpassing last year’s numbers based entirely on the optimism of the vaccine. This surge was not in line with most trends as COVID19 cases are still increasing in most of the western world, making it important for us to think about how travel companies will revisit demand pickup as the situation remains volatile up to the summer of 2021.

In this edition, we compare actual recovery and also look at how bookings are behaving through the rest of January. In addition, we will review if social media behavior across key countries and cities impacted booking trends. What learnings can marketers take away from our analysis of over 12000+ properties across the world? The team at RateGain, always values the critical feedback that you share with us and look forward to your suggestions on how we can continue to add value through our insights to help you recover faster in 2021.

# WHERE ARE WE NOW

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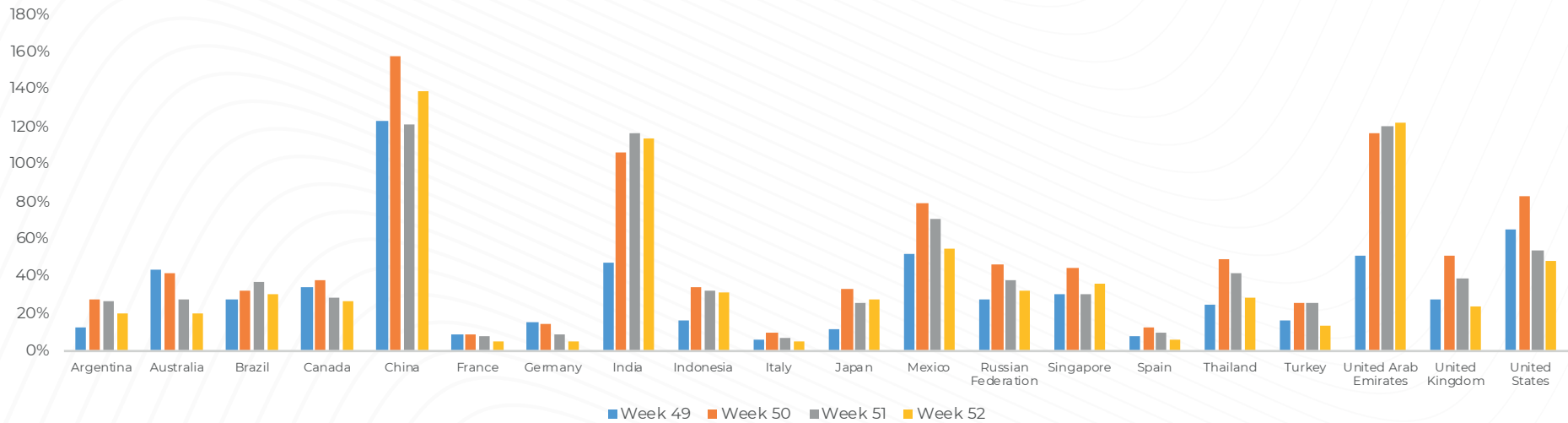
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# THE LAST MILE OF 2020

## How the Holidays Helped the Industry

In our [first edition of PULSE](#), we showed how the largest tourism markets in the world recovered starting from May till end of November battling multiple waves and lockdowns. However, as some countries controlled the surge, and others started rolling out vaccine, in this edition, we track how December, one of the biggest months for the industry panned out in terms of Recovery.

panned out in terms of Recovery. Comparison of bookings across the last four weeks, gives some clear patterns that will be useful for hoteliers, car rental operators, package providers and OTAs to plan the first quarter of 2021.



Source : [DHISCO and RezGain](#)

## **INDIA GOES ON VACATION**

With daily cases in its largest cities dropping around 1000, and concluding a long due wedding season, Indians of all age groups moved out of cities, filling flights to almost 100% capacity, heading to remote destinations to enjoy a well earned break from 2020. Majorly dominated by last-minute travel bookings, India consistently made higher travel bookings than last year as India plans to open up more travel bubbles in the spring with neighboring countries.

## **UAE GETS THE BEST OF BOTH WORLD**

UAE positioned itself as a hub of transit travel during COVID19, allowing travelers to enter UAE, and leave on flights for other countries after a mandatory quarantine, seeing a surge in bookings and inbound travelers, from India who were looking for an international trip, or European and American citizens looking to travel back to their respective countries, making UAE also book higher rooms than last year.

## **A SPIKE OF JOY FOR UNITED STATES**

As the first shot of vaccine was delivered in the UK, United States saw its highest weekly bookings since March, touching upto 83% of last year levels and its highest daily bookings since March. However, with a rise in cases, and most of United States, going back on lock down, bookings when compared to last year were lower going down to 50% of last year, the lowest United States has seen all through out the pandemic.

## **THE UNRELENTING CHINESE TRAVELER**

Ever since its last break in September, the local Chinese traveler, has been booking and traveling more with bookings being consistently higher than 2019 levels with 25% higher bookings received in all the weeks of December. Even though China is seeing a surge in daily cases, and had the first fatality from the virus in 242 days, the Chinese traveler, the biggest outbound travel market in the world has sustained the domestic market's recovery over he last three months.

## **SOUTH-EAST ASIA SHOWS SIGNS OF RECOVERY**

With India, UAE, Saudi rolling out vaccines, South-east Asia is earnestly looking at its western neighbors to begin flights and help in an early recovery 2021, as the average recovery across Singapore, Thailand, Indonesia hovered around 40%. India's next big wedding season is starting now, and with the Chinese new year coming in early Feb, this region would be the one to watch out for, as travelers throng to the tropical destinations for a much needed break, however a lot would depend on the vaccine roll out and COVID19 restrictions.

## **WAIT AND WATCH BY EUROPE**

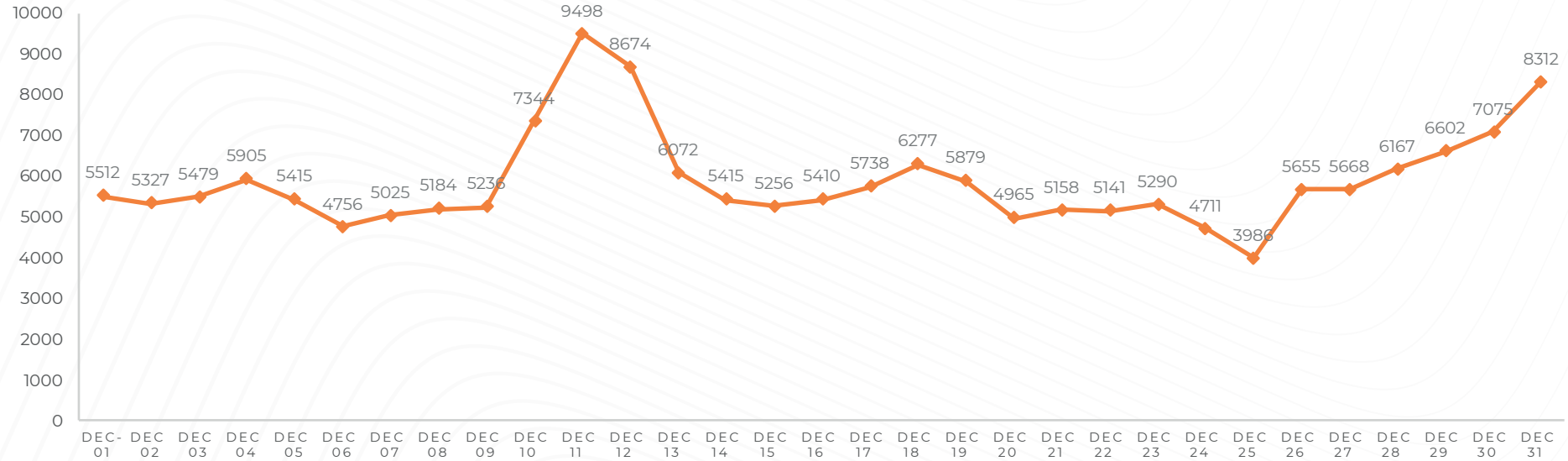
With the new strain in the UK, and a surge in cases across Europe, travel recovery has been at the lowest levels since the pandemic started with most countries not even crossing the 10% mark, with lockdowns in place till March.

# THE RIGHT KIND OF SURGE

## Tracking the Outbreak of High U.S. Bookings

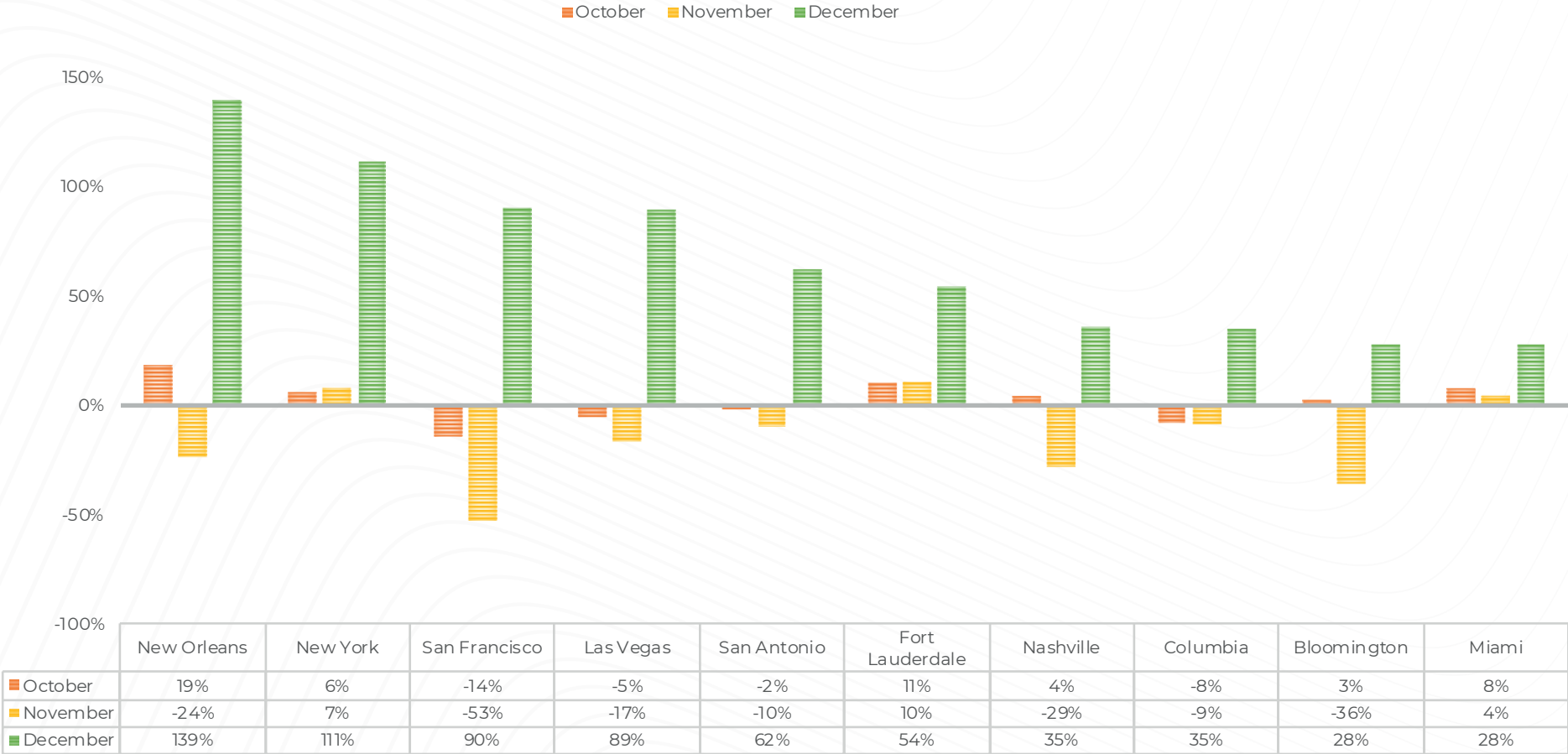
The United States cannot wait to travel and December proved that to us as [Bloomberg and RateGain](#) broke the news to the world of the impact of the first vaccine shot on daily bookings in the US, however, as we expected the surge was not a one-off event we saw bookings increase in the last week of December coupled both by year end plans, as well as the vaccine roll out consistently increasing since December 27th after an initial roll out on December 14th.

This saw bookings touch another high of 8312 the third highest day in the OND quarter. As we saw increased bookings in December, we also looked at which cities have recovered and which cities declined in December. With the new administration committing to Masks in all public spaces and putting stricter regulations around social distancing, it was surprising to see three predominantly blue cities showing signs of healthy recovery in December, while traditional red cities continue to show healthy growth in bookings



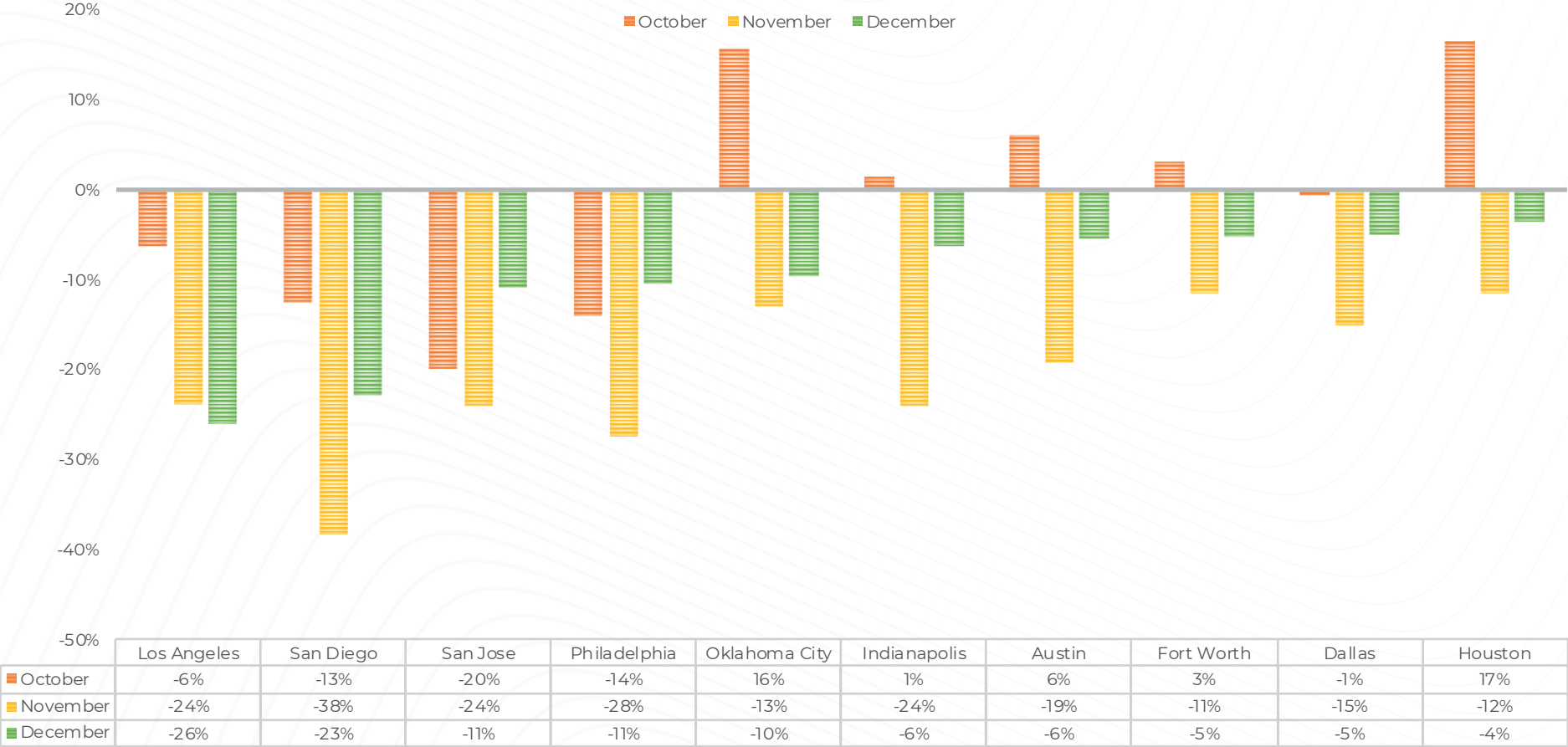
Source : [DHISCO and RezGain](#)

# U.S. Cities that Bounced Back During the Holidays



Source : [DHISCO](#) and [RezGain](#)

# U.S. Cities that Dipped During the Holidays



Source : [DHISCO and RezGain](#)



# WHAT DO GUESTS WANT

A Year Long Analysis of Queries by Guests in the U.S.



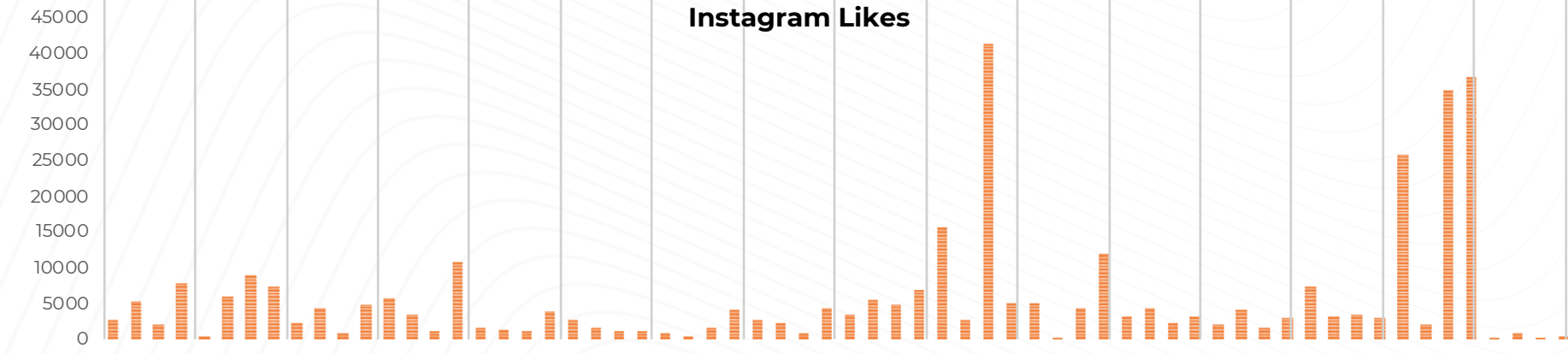
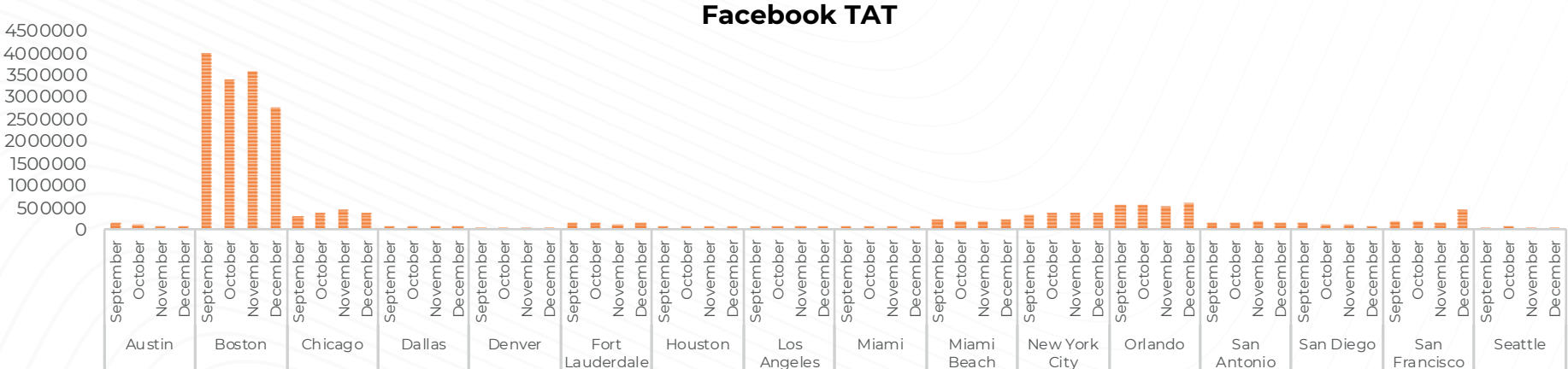
Source : [BCV](#)

Even though parts of United States was shut down in November and December due to the raging third wave, we saw an increase guest messages in December as well as October, coming close to pre-pandemic levels in March, as the U.S. saw the conclusion of an election year as well as a surge in bookings due to the roll out of the vaccine. However, messaging activity is yet to reach January levels when BCV was processing over 115K messages on a monthly basis for its partner hotels.

Our analysis also shows that guests in the U.S. have lesser concerns or demands at the moment, when visiting a hotel, as compared to the summer, when the volume of private messages v/s community messages were 3 per 100, as compared to 1.5 per 100 messages received in November and December, concluding that guests are now able to trust hotels more while planning their travel.

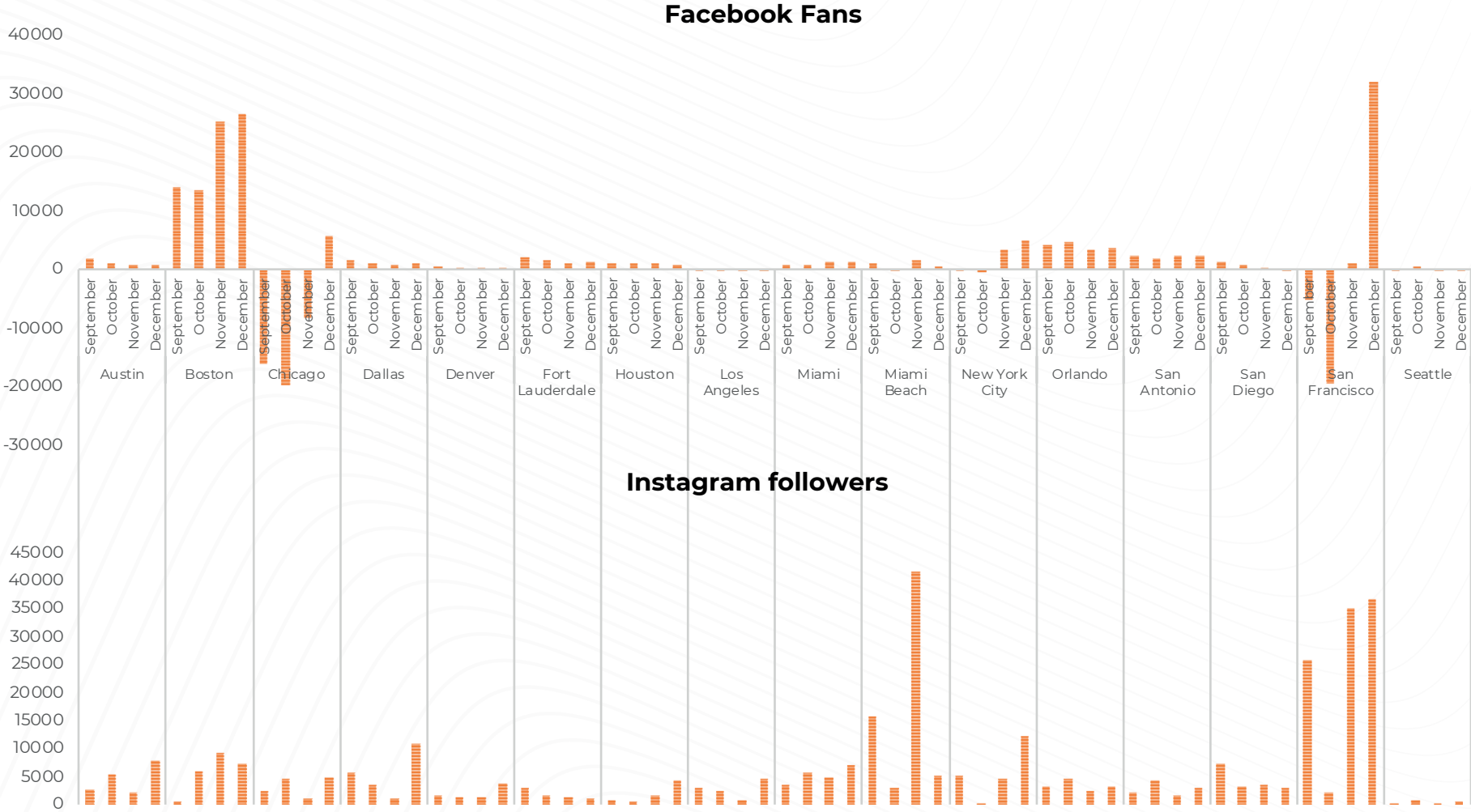
Another heartening statistic observed was the increase in messages related to 'Travel planning' which was at its highest since March when over 7000+ messages were processed related to travel planning. December also, saw the lowest number of messages exchanged on POLITICS since June, as America concluded an election that saw over 150 million people vote.

# WHICH U.S. CITIES ARE MOST EAGER TO TRAVEL



Source : [BCV](#)

# WHICH U.S. CITIES ARE MOST EAGER TO TRAVEL



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### **BOSTON HOLDS ON TO FACEBOOK**

Hotels in BOSTON continue to see healthy engagement on Facebook with 25% of the population of BOSTON being in the 35-54 age demographic. It is also the only city where hotels have seen a higher growth on Facebook when compared to Instagram. Every other city as part of our analysis saw higher engagement on Instagram.

### **INSTAGRAM IS THE GOTO CHANNEL FOR HOTELS**

For every city that we analyzed on our Active Social platform, we saw that on an average engagement and increase in followers on Instagram is at least higher by 3x with the exception of BOSTON where Facebook continues to be the preferred channel.

### **GOOD WEATHER, MORE INSTALOVE**

Miami Beach and San Francisco, saw the highest engagement in the United States September through December thanks to the great weather. Even though cases in both cities increased, eventually forcing California into lockdown, however engagement with hotels on Instagram only kept going higher

### **BIG APPLE SEES SIGNS OF LIFE**

As the year end celebrations came closer, while the Times Square Ball Drop was not allowed to pack large crowds, social media users crowded Hotel Pages on Instagram with engagement increasing by over 8X as compared to September and 3x when compared to November



## About RateGain

RateGain is a leading provider of SaaS products, which help travel and hospitality companies with cognitive revenue management, smart e-distribution, and brand engagement to make more revenue every day. RateGain is proud to support 250,000+ hotel properties globally by providing 240 billion rate and availability updates & powering over 30 Million bookings. RateGain is trusted by 25 out of the top 30 OTAs, world's fastest-growing airlines, 23 of the top 30 hotel chains, tour operators and wholesalers, all top car rental companies, largest cruise lines, and the largest travel management companies. In 2018, RateGain acquired DHISCO, which made it the only company in the world to offer end-to-end smart distribution. In June 2019, RateGain acquired award-winning BCV to offer guest experience cloud to maximize guest lifetime value for hospitality chains. For more information, visit [www.rategain.com](http://www.rategain.com)