

A blue-tinted photograph of three business travelers in an airport hallway. A woman in a dark blazer is on the left, a man in a suit is in the center holding a smartphone, and another man in a suit is on the right pulling a suitcase. The hallway has a sign for 'Hall 7' in the background.

Survey Says: The New Trends Shaping Travel

Global hotelier insight and forward-looking
data surface worldwide recovery trends

amadeus | **PhocusWire**
FREE WEBINAR

Today's presenters



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Amadeus



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Chief Commercial Officer,
NH Hotel Group



Kevin May

Editor-In-Chief
PhocusWire

What will we cover today?

01 Global market performance

02 The new trends shaping recovery

03 The future of operations

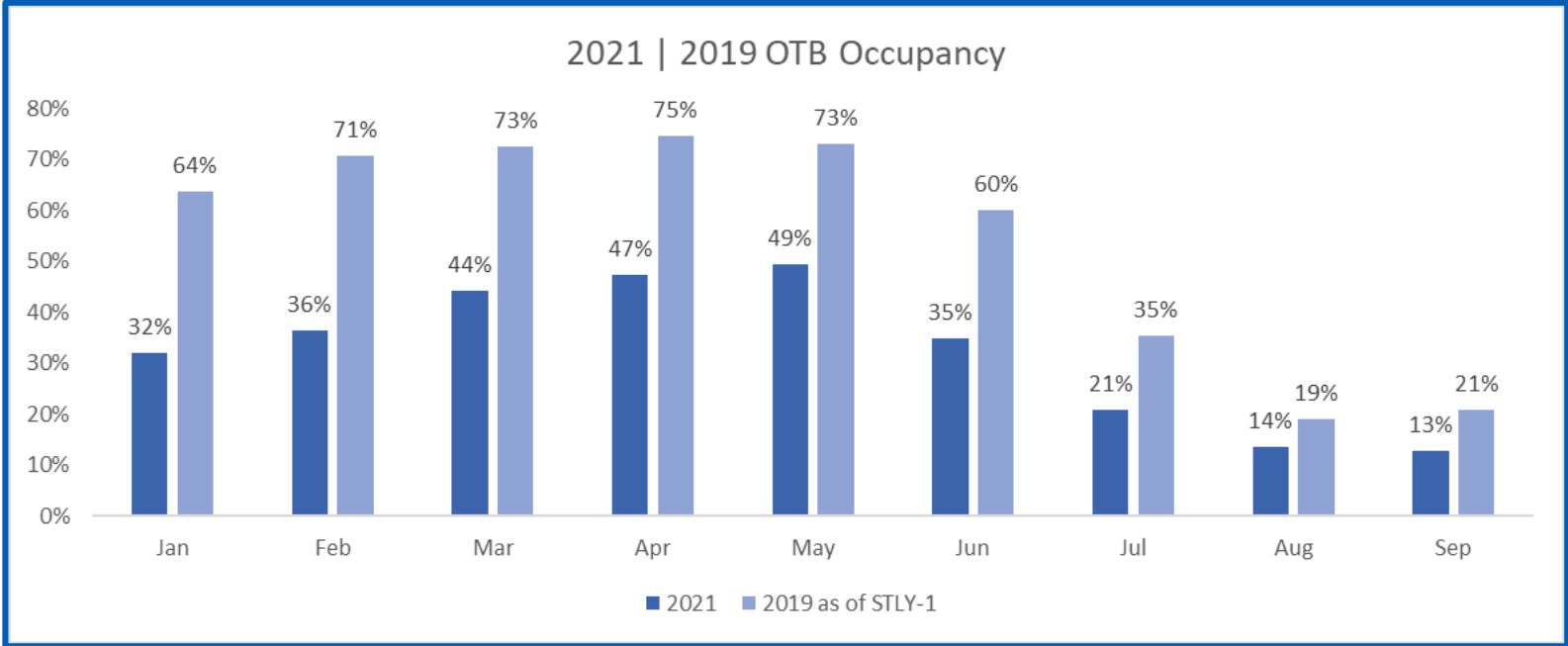
04 Prepare for what's ahead

05 Q&A

Global market performance

01

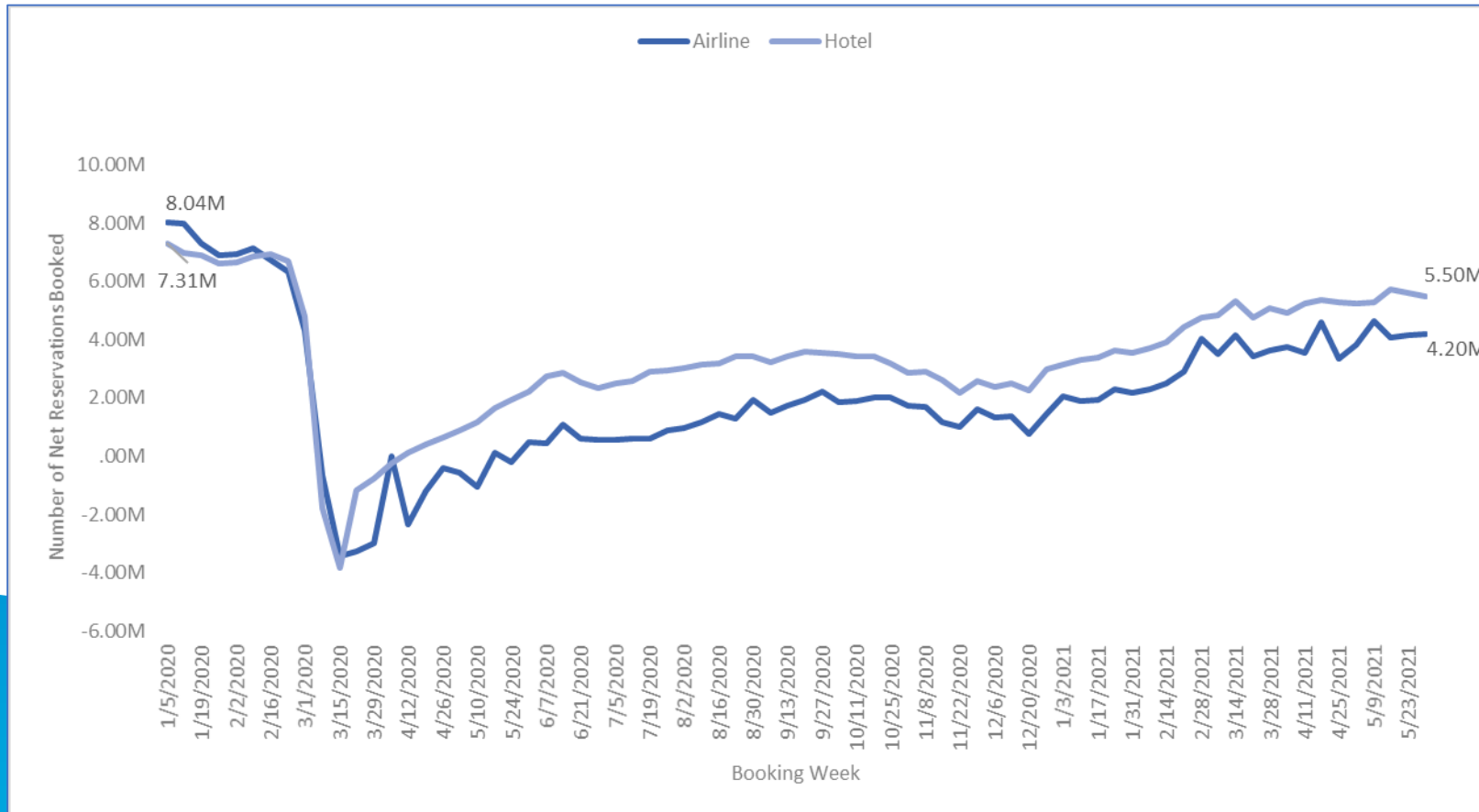
Global hotel on-the-books occupancy



Source: Amadeus' Demand360® data as of June 4 2021

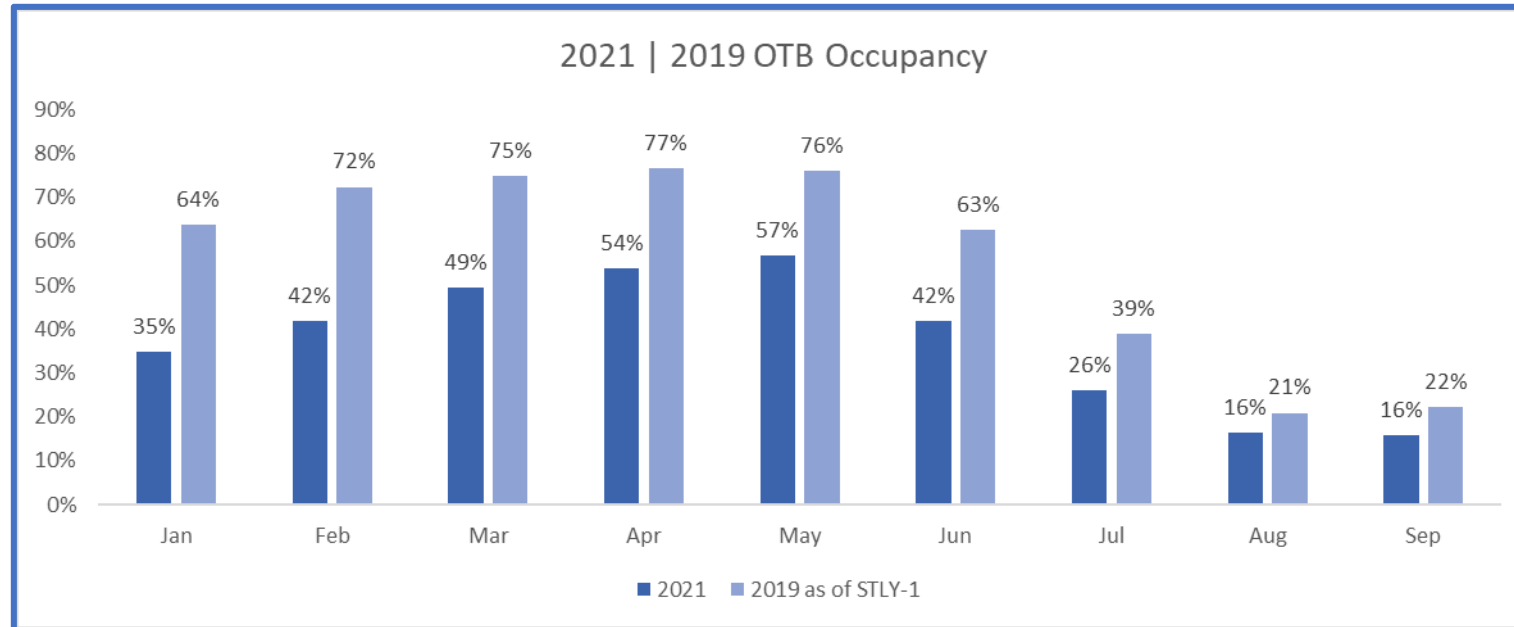
Net hotel booking activity - US

Number of weekly net reservations booked for any future stay period



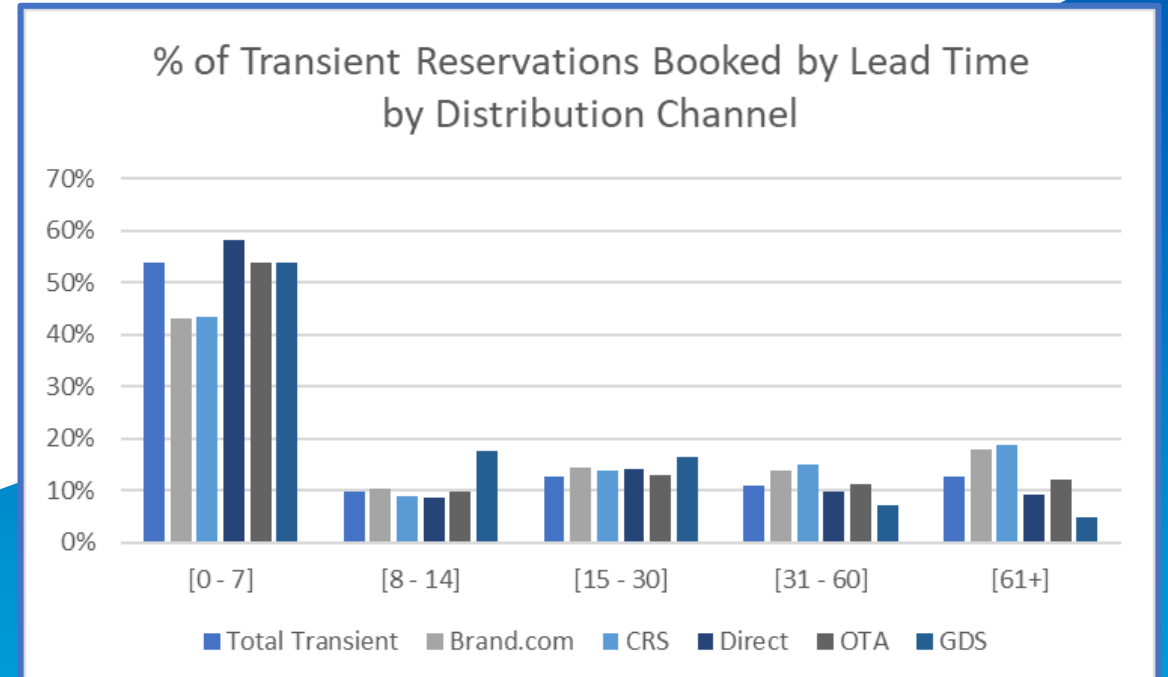
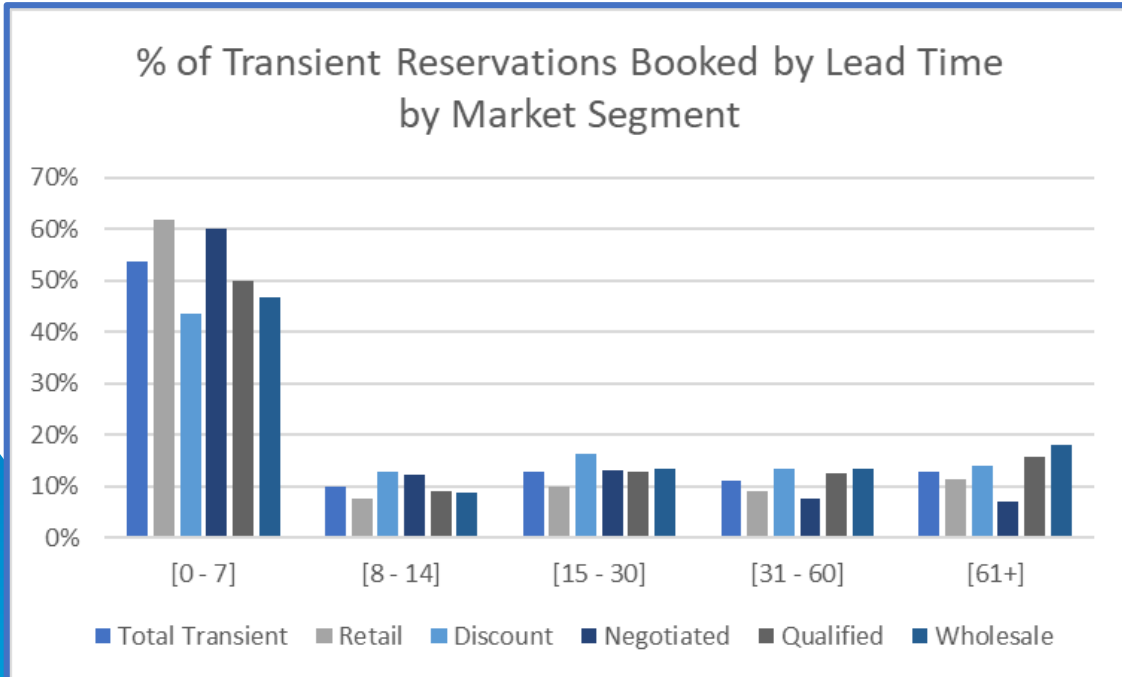
Source: Amadeus' Demand360® data as of June 4 2021

Hotel on-the-books occupancy - US



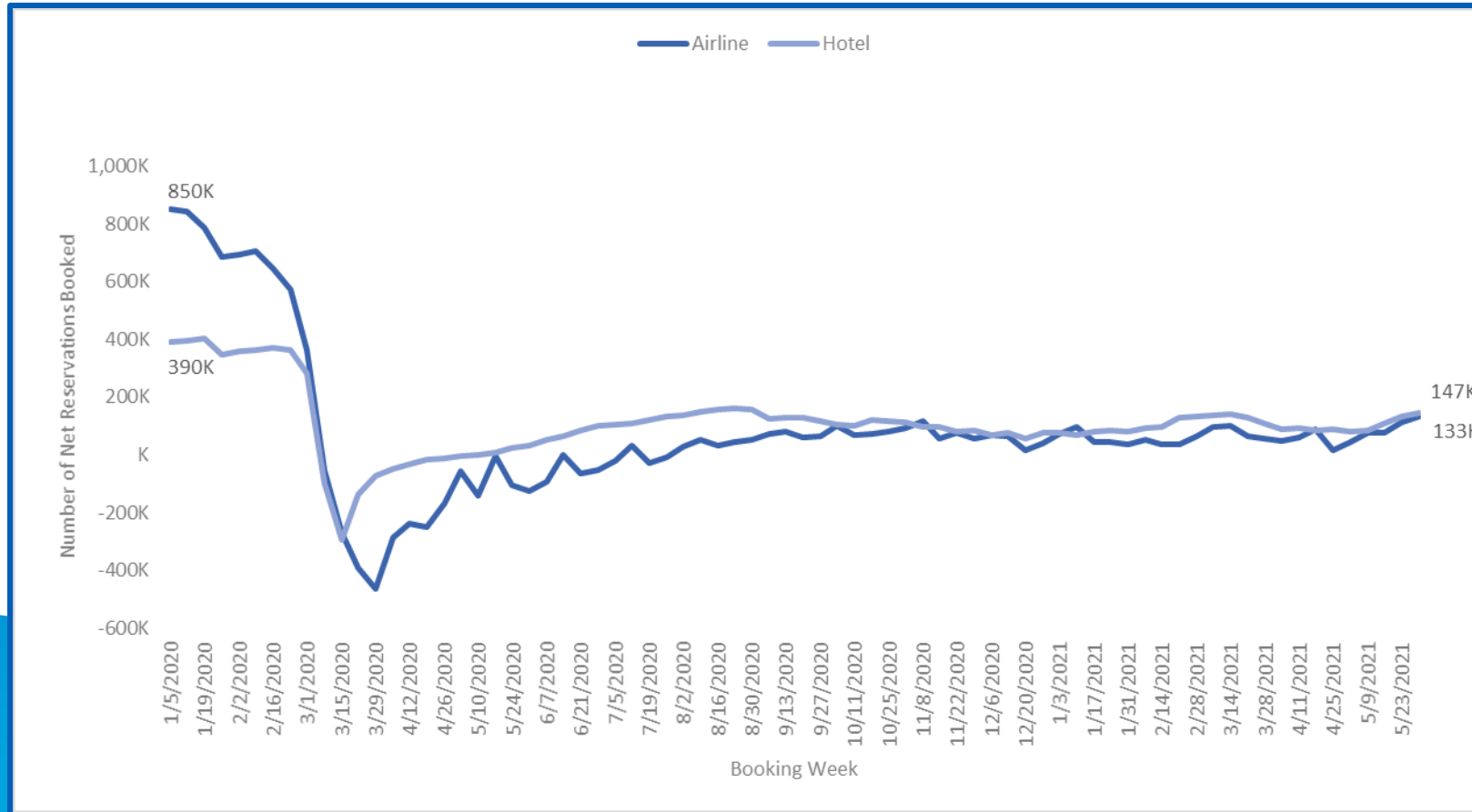
Booking lead time - US

Trailing 5 weeks

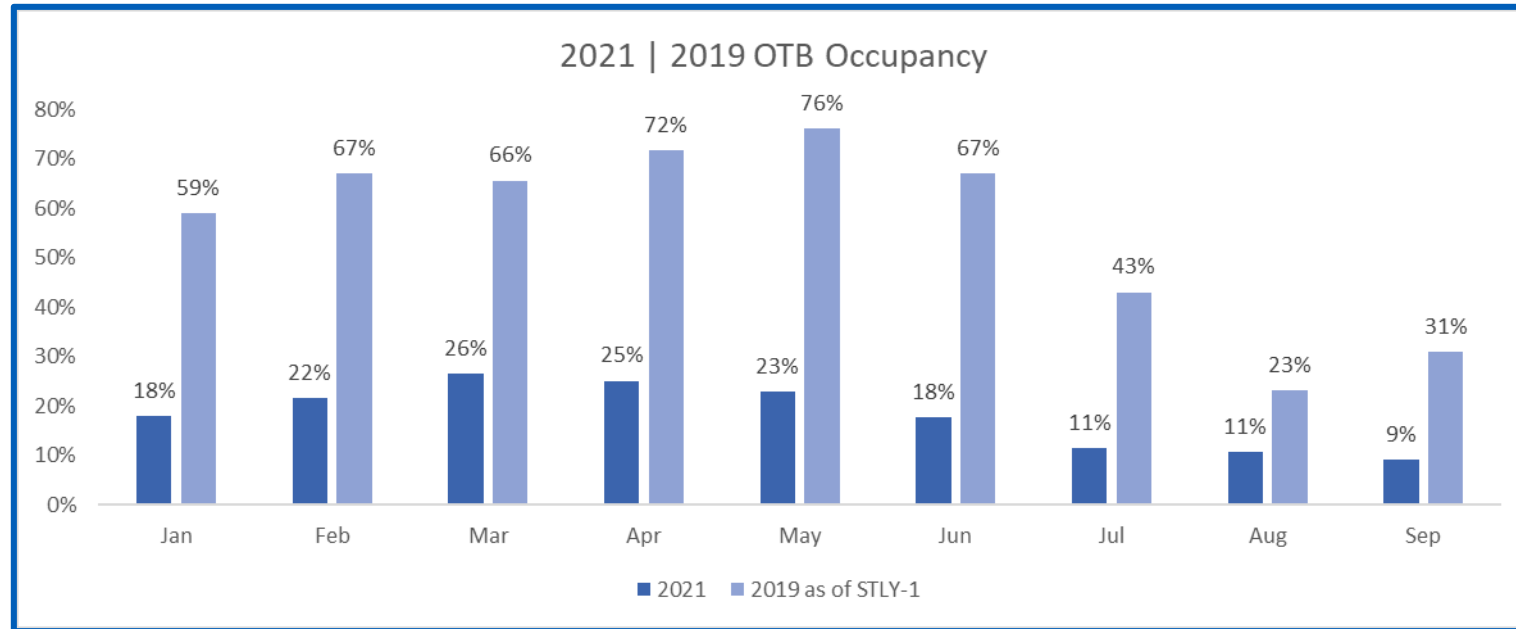


Net hotel booking activity - Canada

Number of weekly net reservations booked for any future stay period

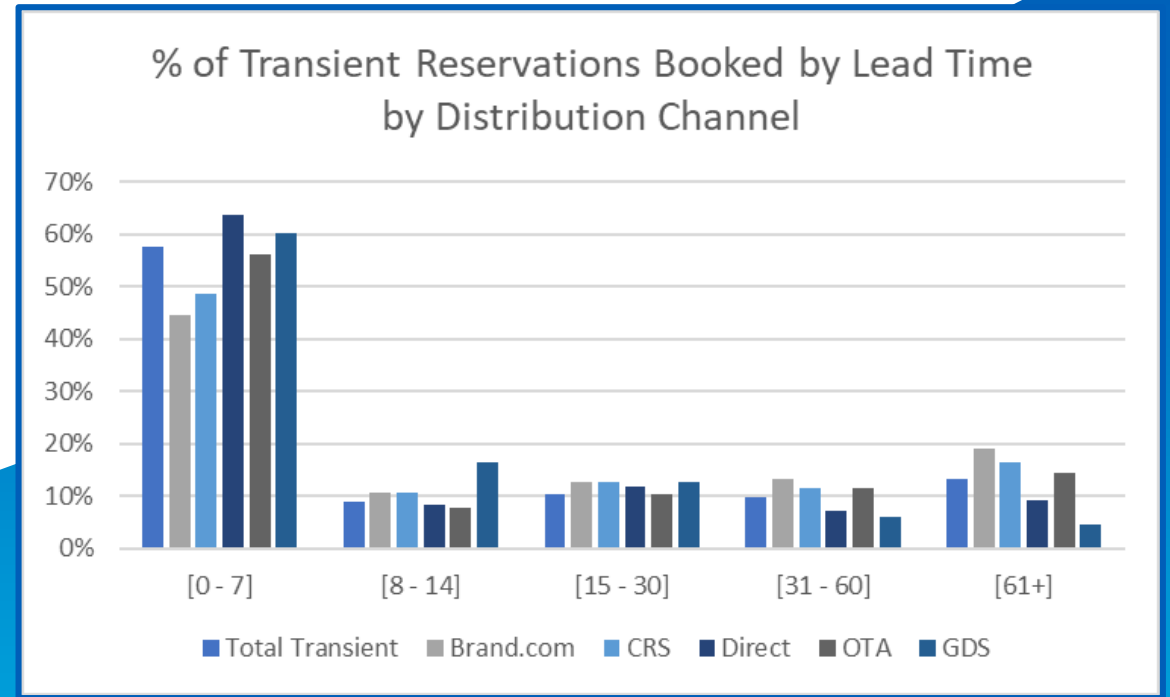
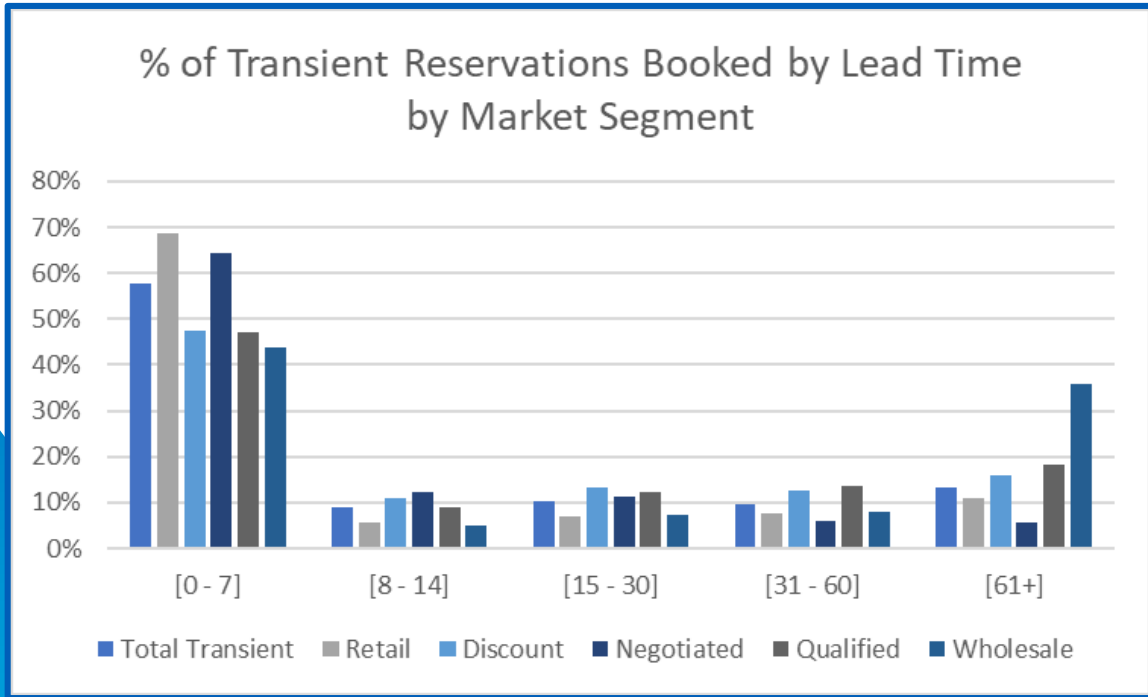


Hotel on-the-books occupancy - Canada



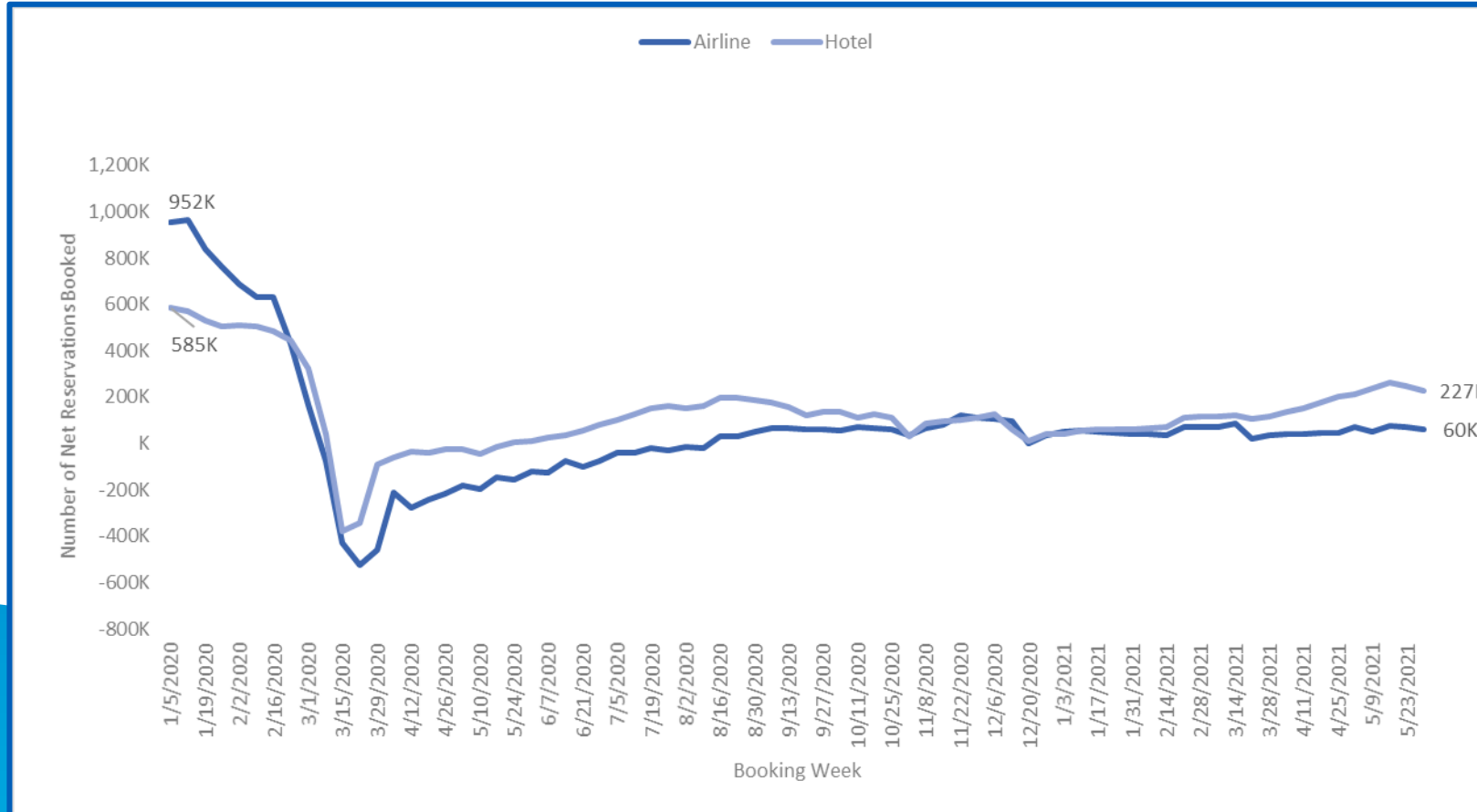
Booking lead time - Canada

Trailing 5 weeks

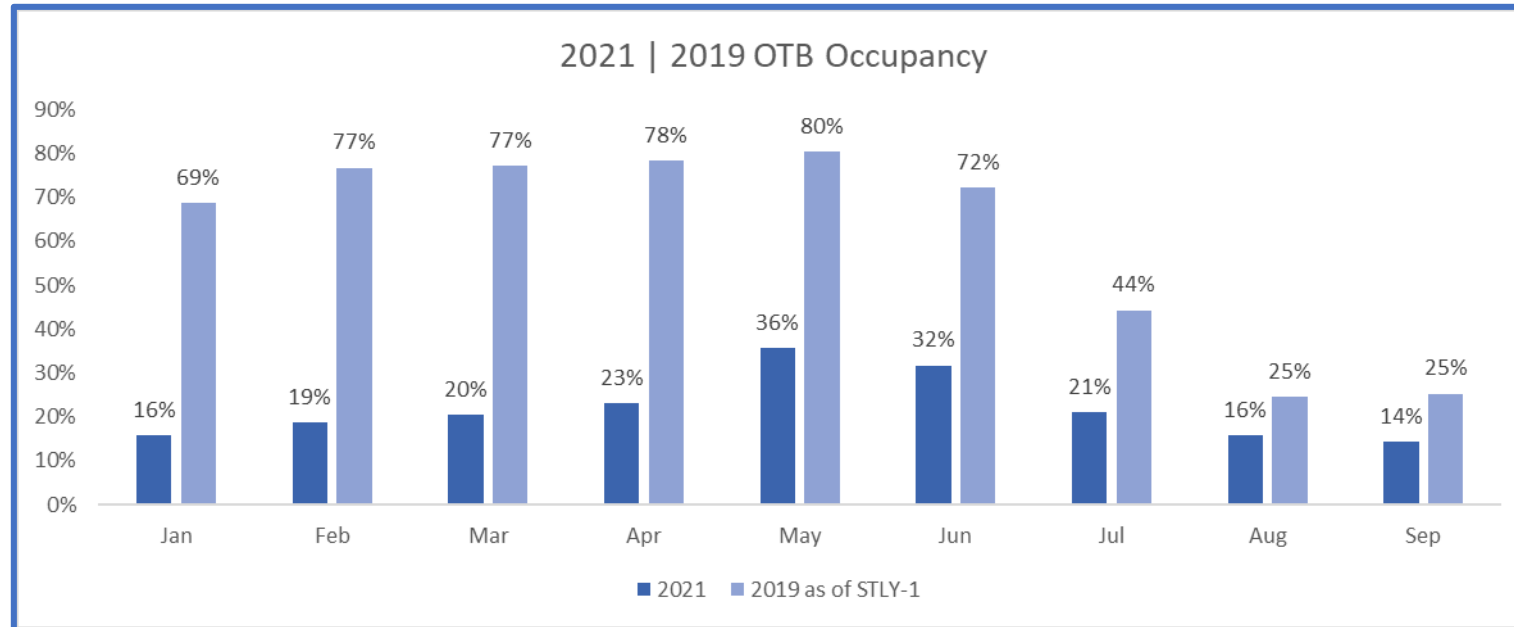


Net hotel booking activity - UK

Number of weekly net reservations booked for any future stay period

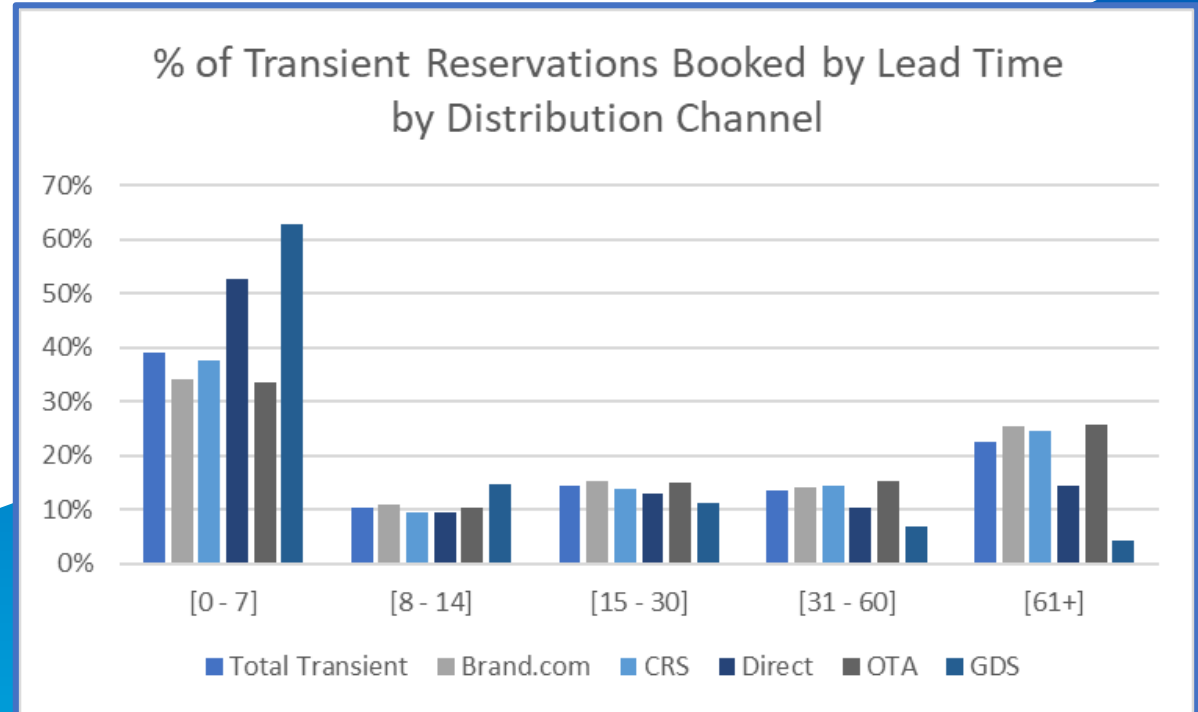
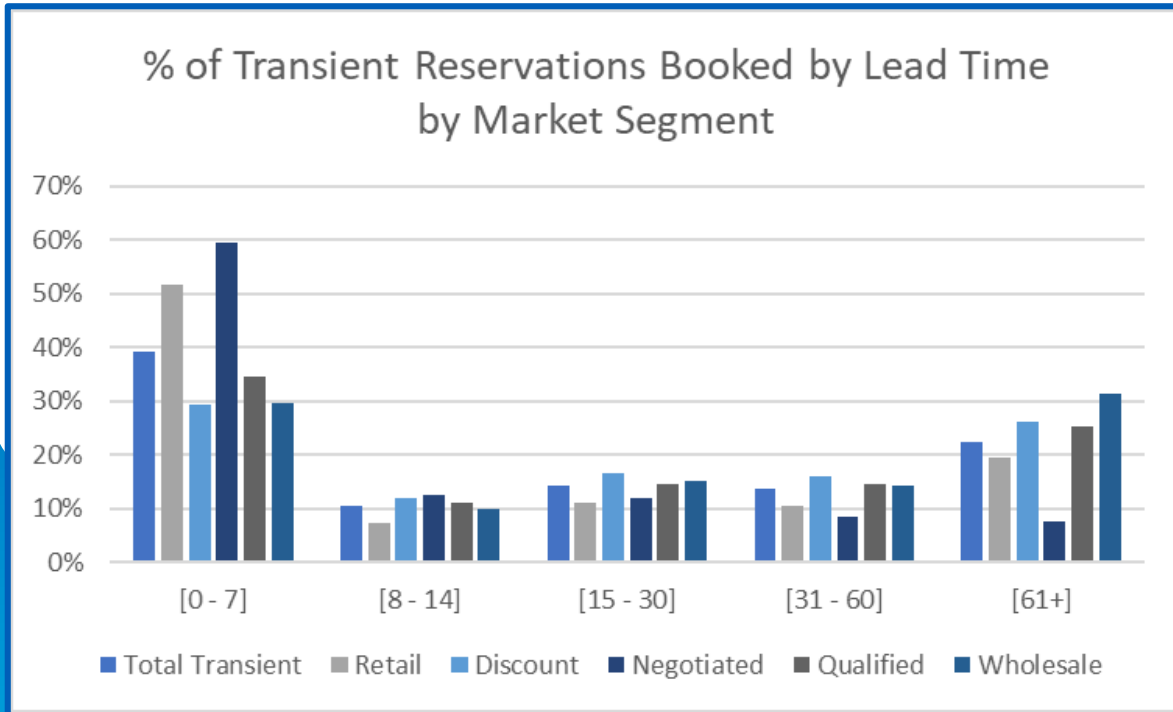


Hotel on-the-books occupancy - UK



Booking lead time - UK

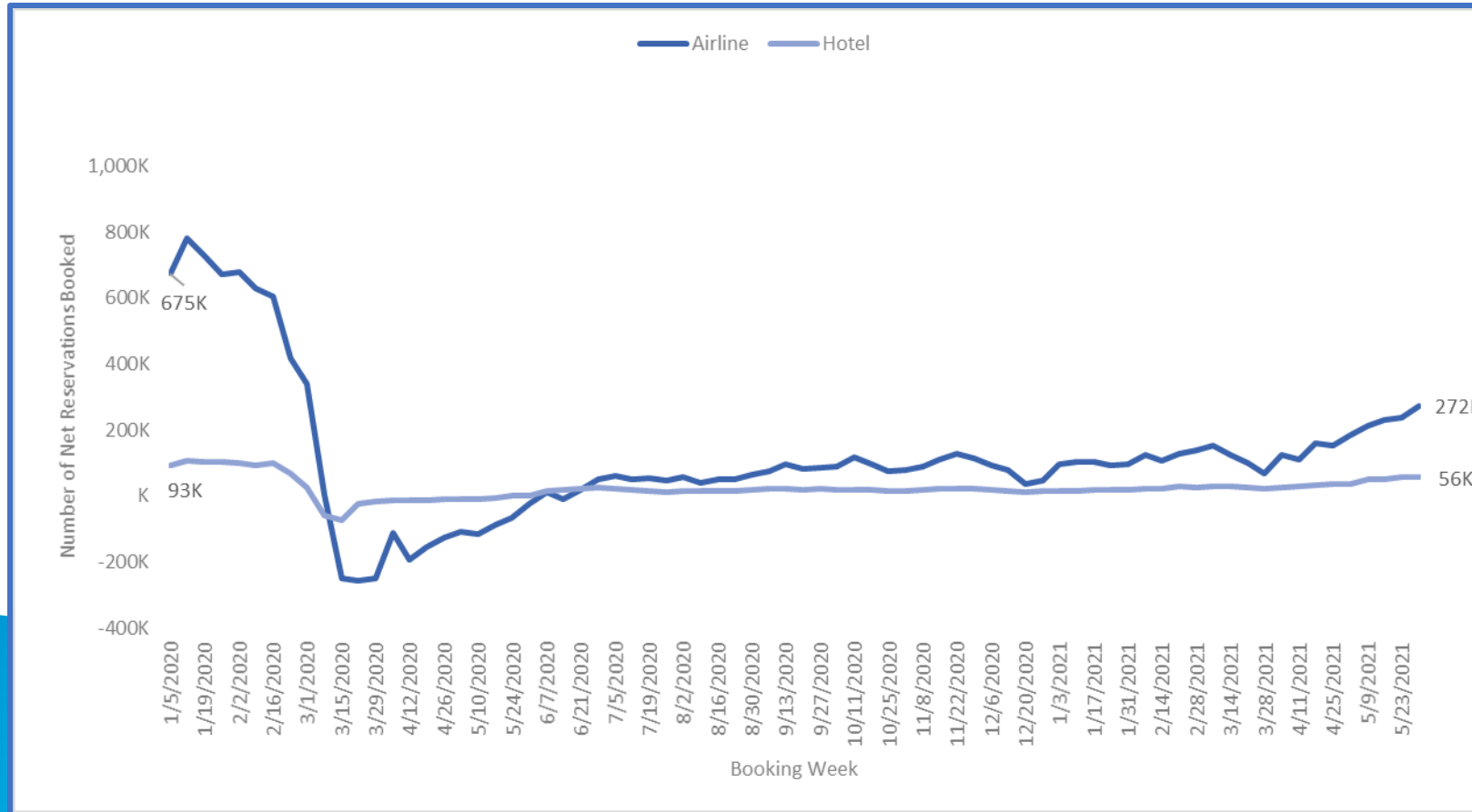
Trailing 5 weeks



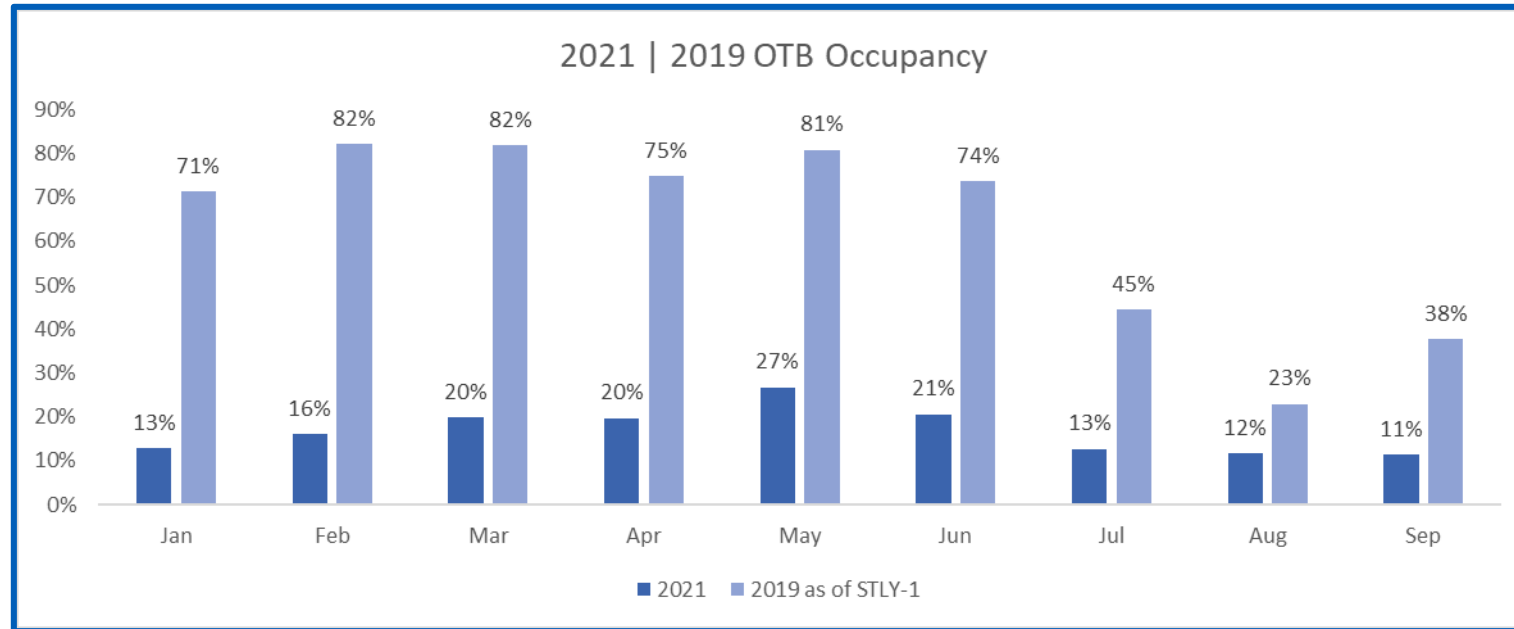
Source: Amadeus' Demand360® data as of June 4 2021

Net hotel booking activity - Spain

Number of weekly net reservations booked for any future stay period

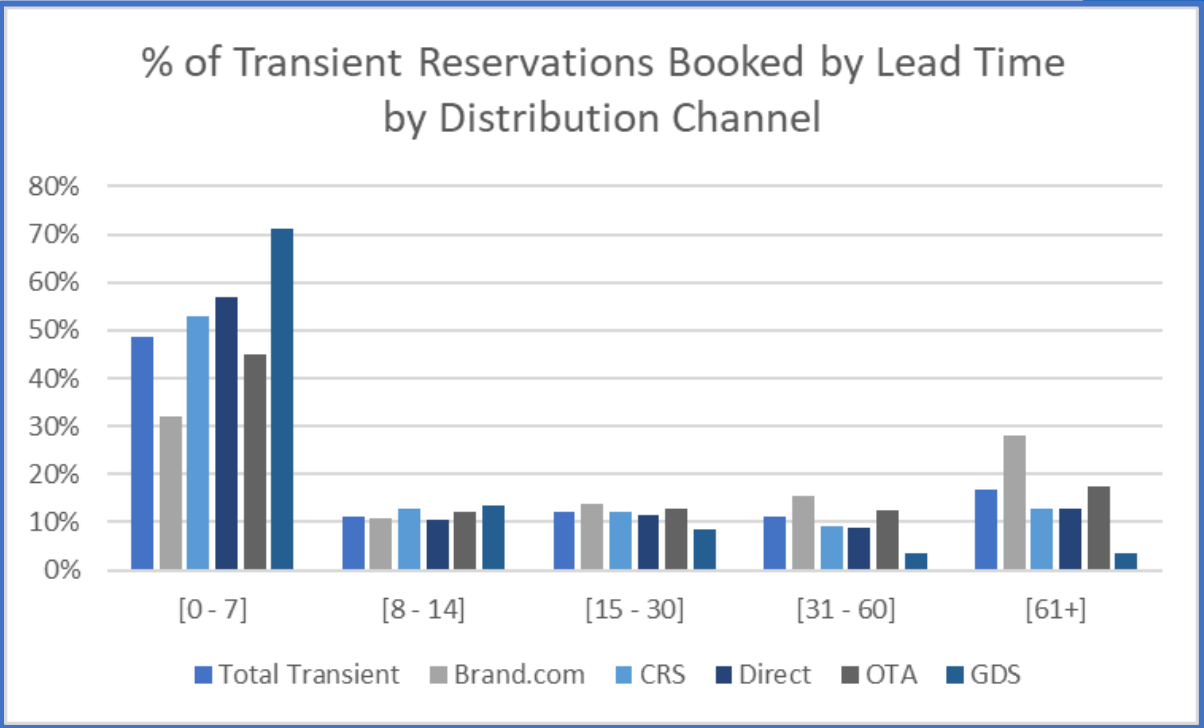
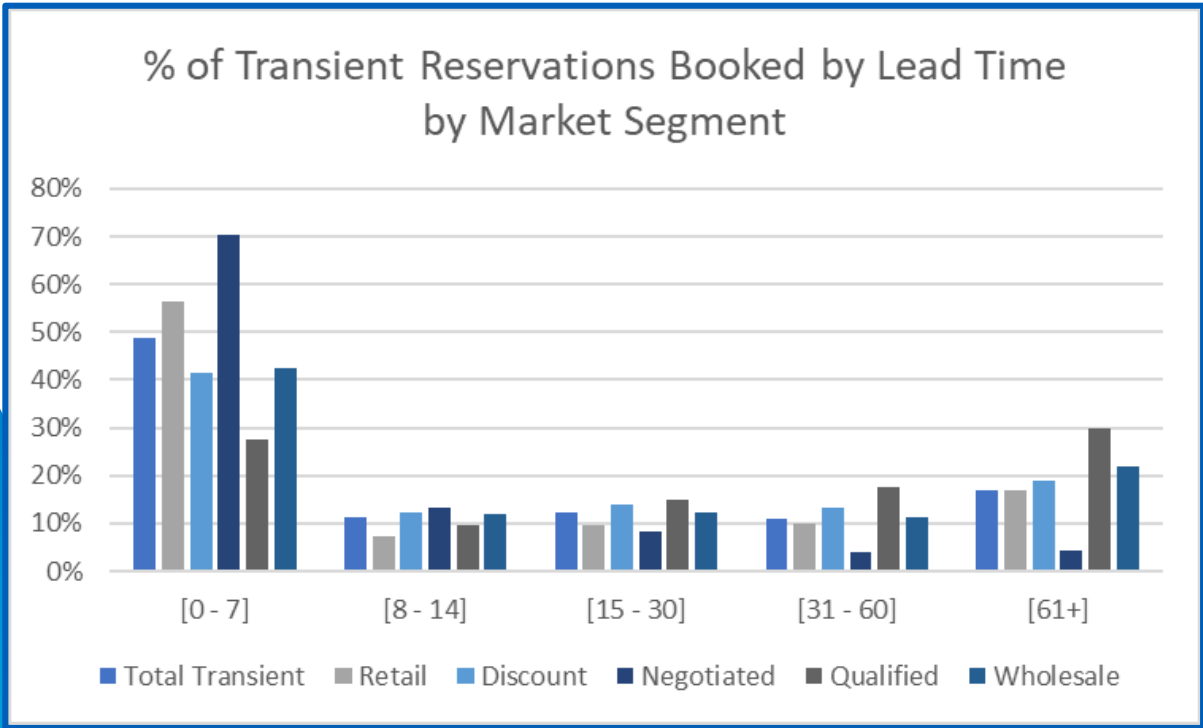


Hotel on-the-books occupancy - Spain



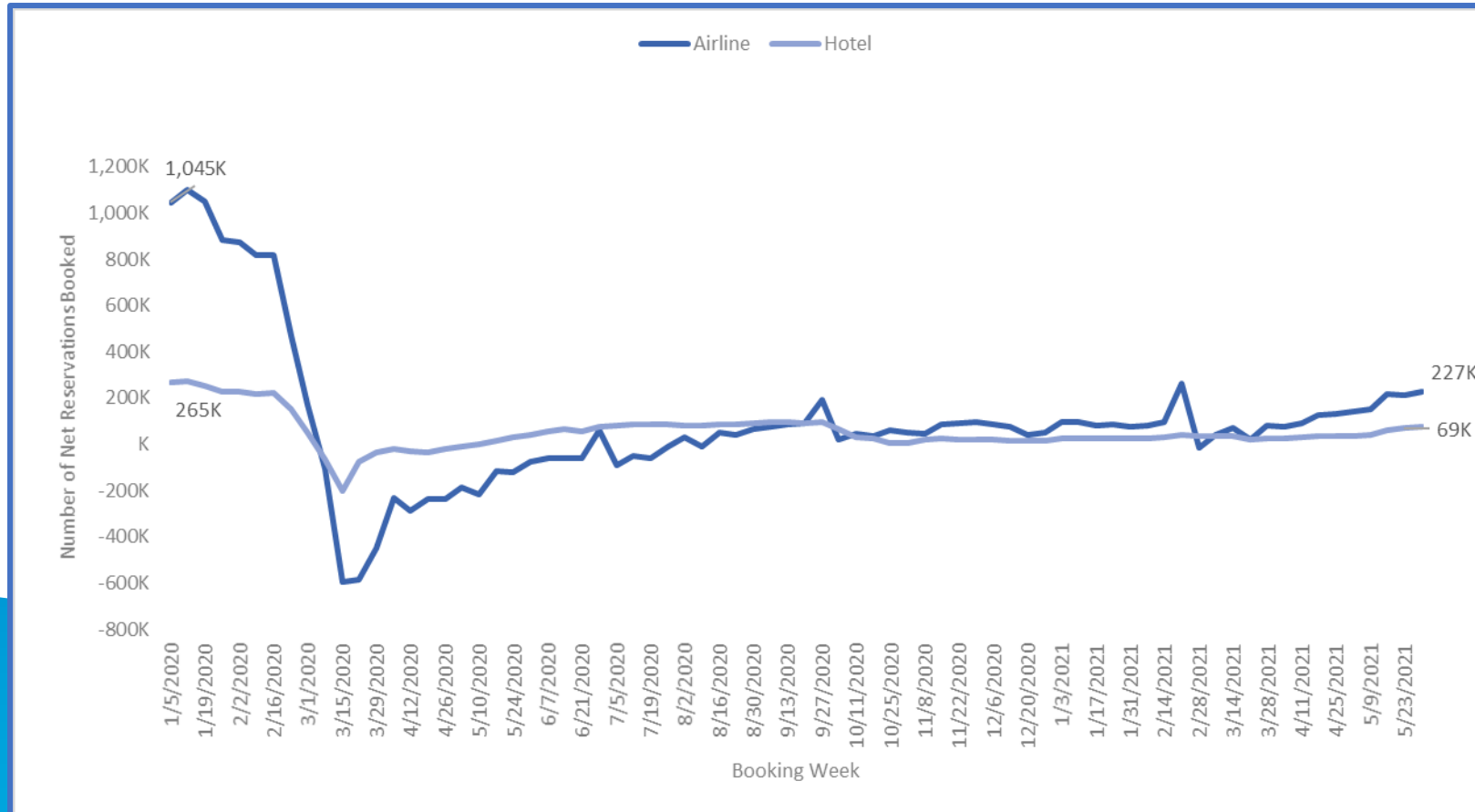
Booking lead time - Spain

Trailing 5 weeks



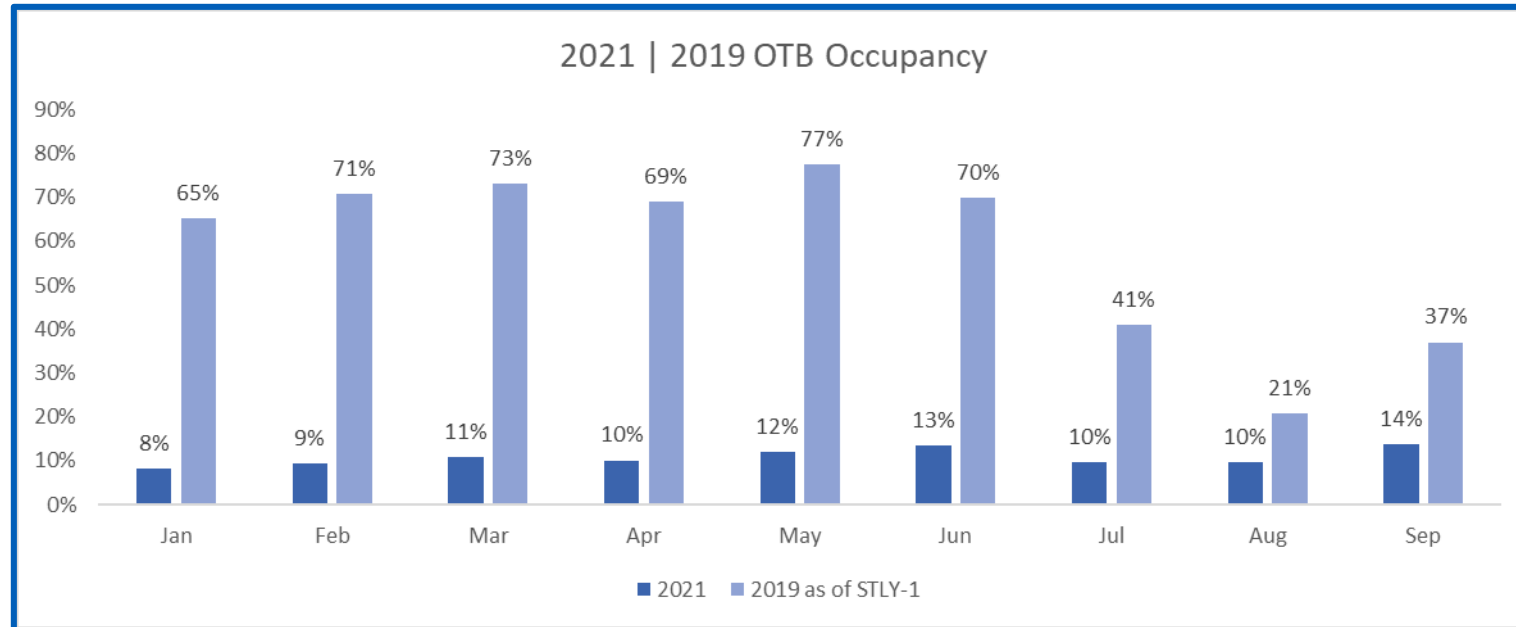
Net hotel booking activity - Germany

Number of weekly net reservations booked for any future stay period



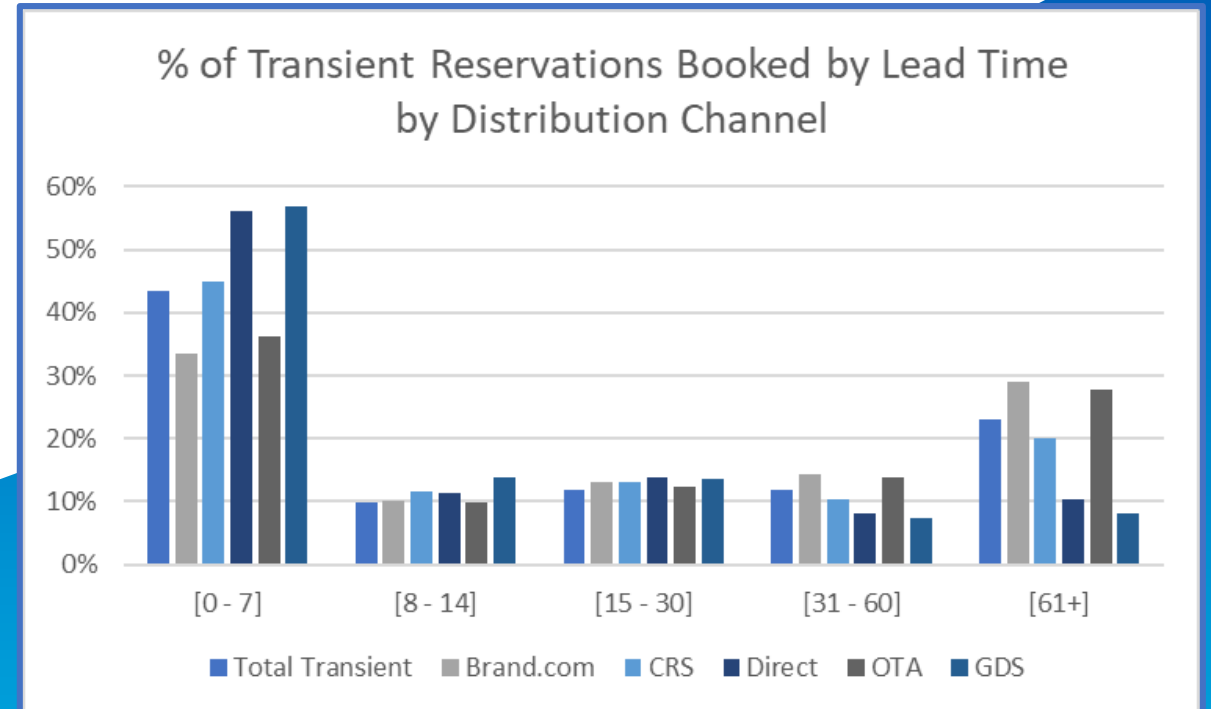
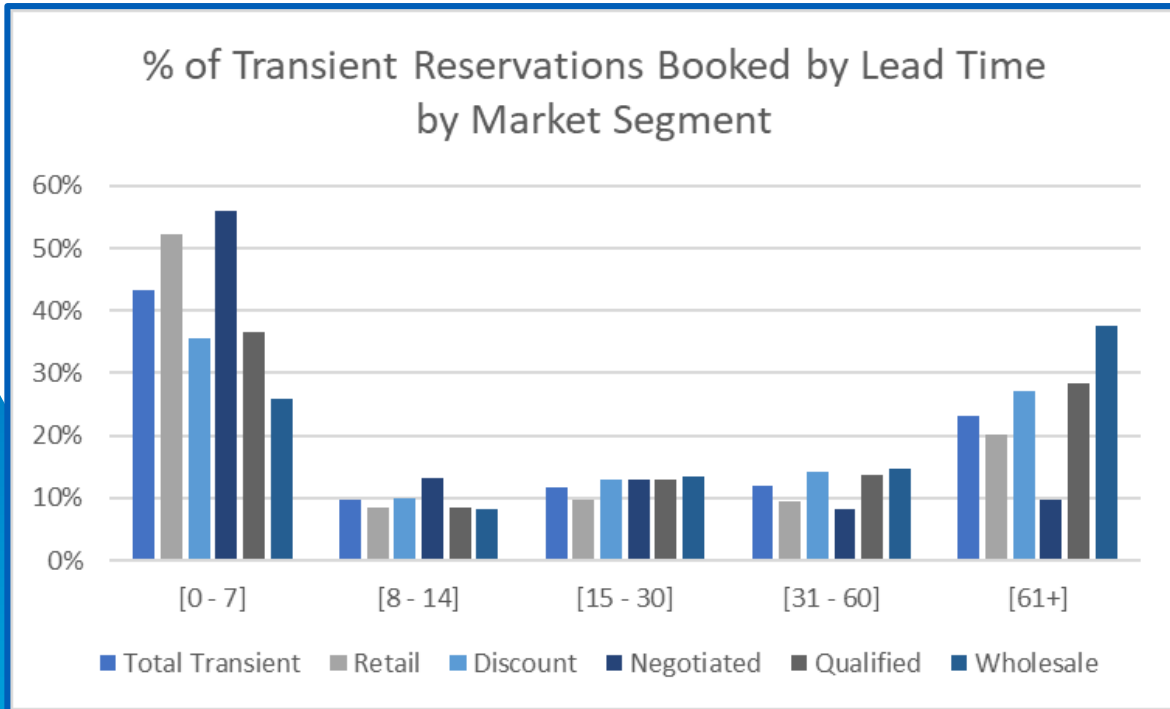
Source: Amadeus' Demand360® data as of June 4 2021

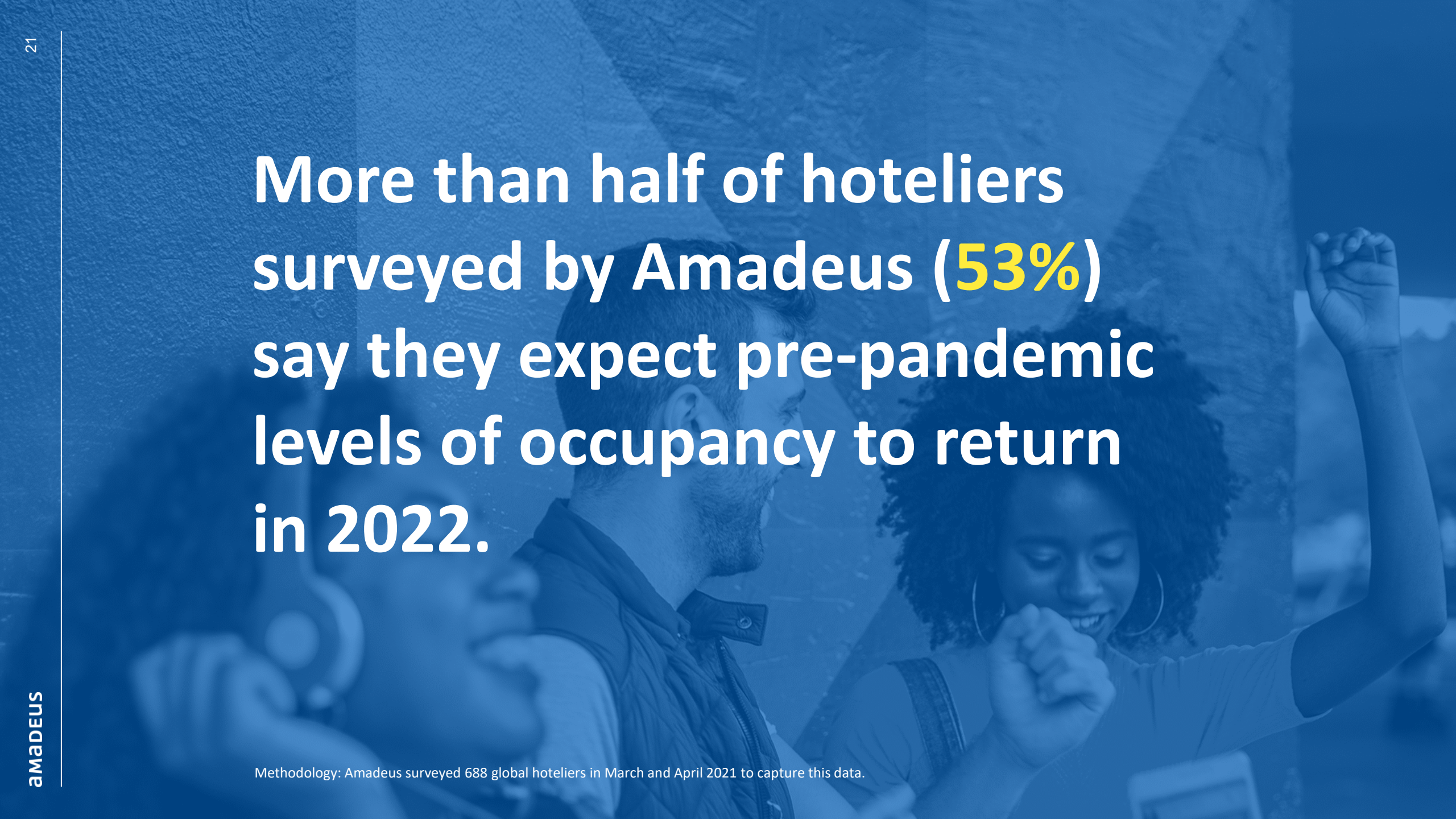
Hotel on-the-books occupancy - Germany



Booking lead time - Germany

Trailing 5 weeks





More than half of hoteliers surveyed by Amadeus (**53%**) say they expect pre-pandemic levels of occupancy to return in 2022.

Methodology: Amadeus surveyed 688 global hoteliers in March and April 2021 to capture this data.

The new trends shaping recovery

02

Generating demand

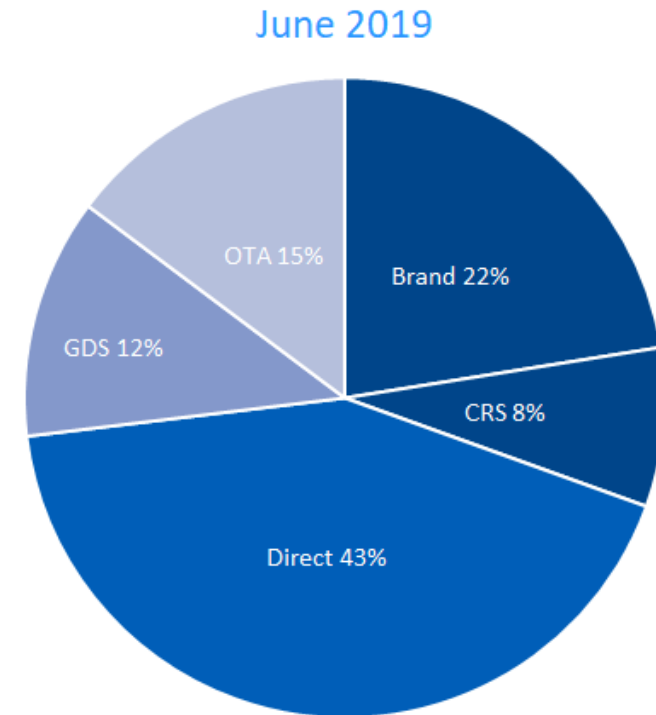
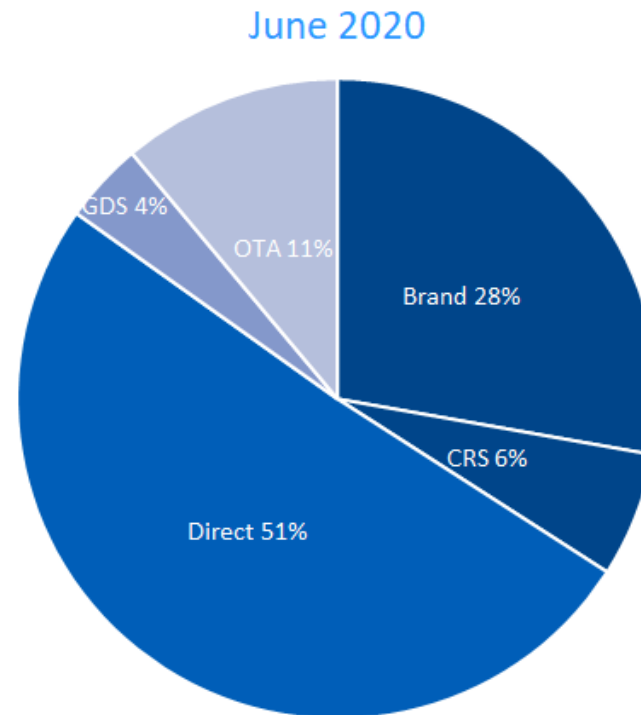
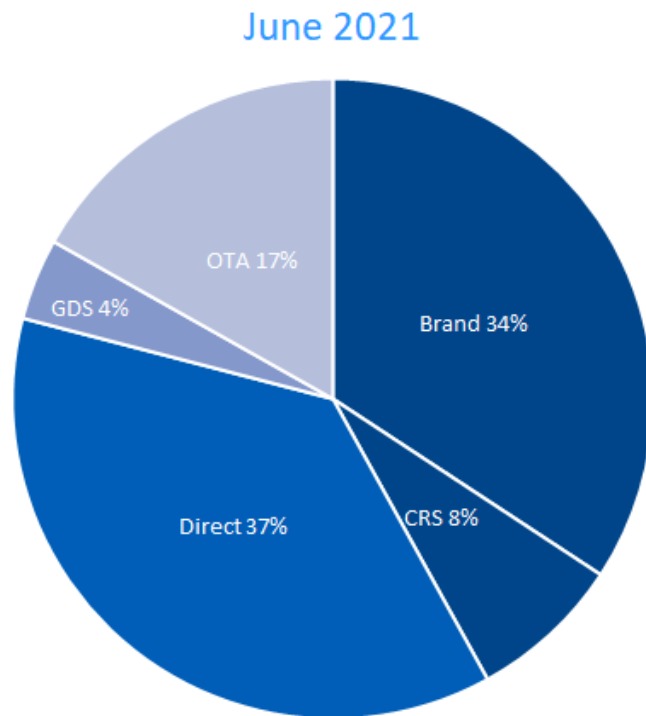
- 1.** Hoteliers worldwide ranked digital media & advertising as the #1 technology they found most helpful last year.
- 2.** 60% of survey respondents say they successfully engaged with new digital marketing strategies in the past year.



Global traveler segmentation

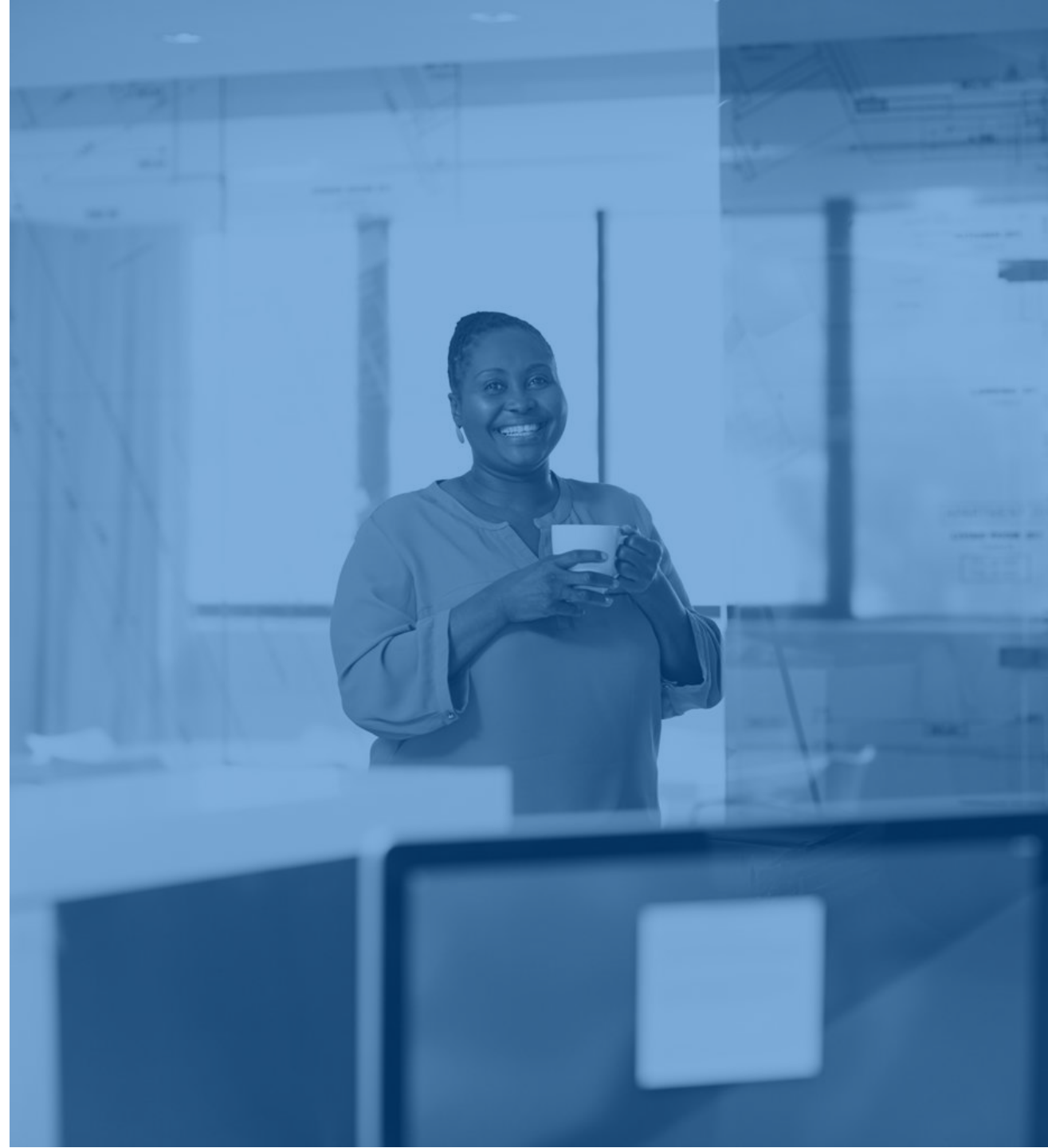
Channel mix

Hoteliers rank OTAs, Direct, and Brand.com as the three most important distribution channels for their business this year.



Hoteliers believe leisure will drive recovery

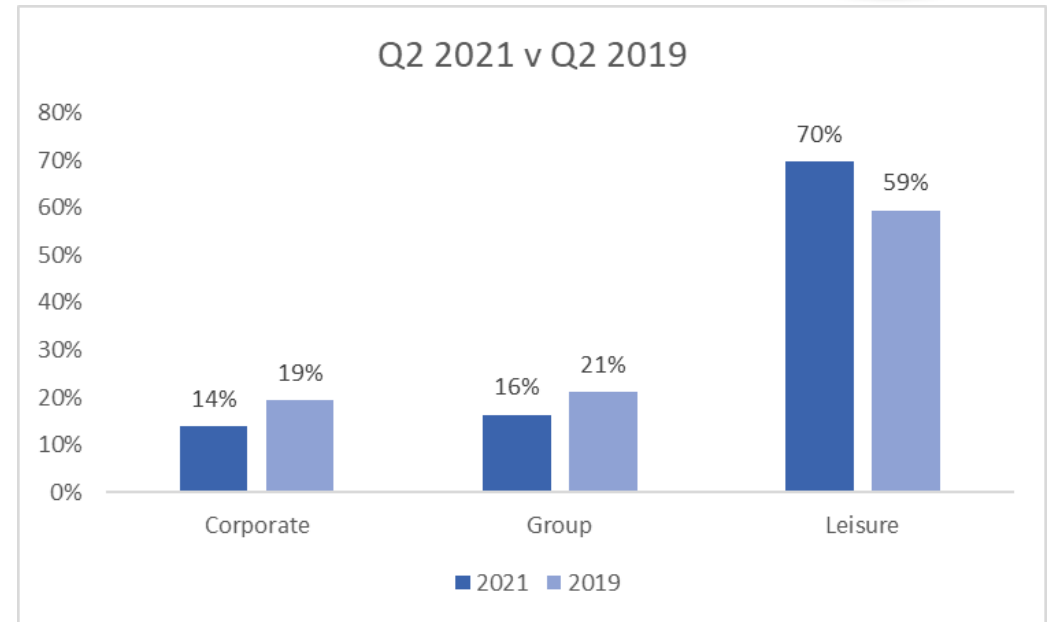
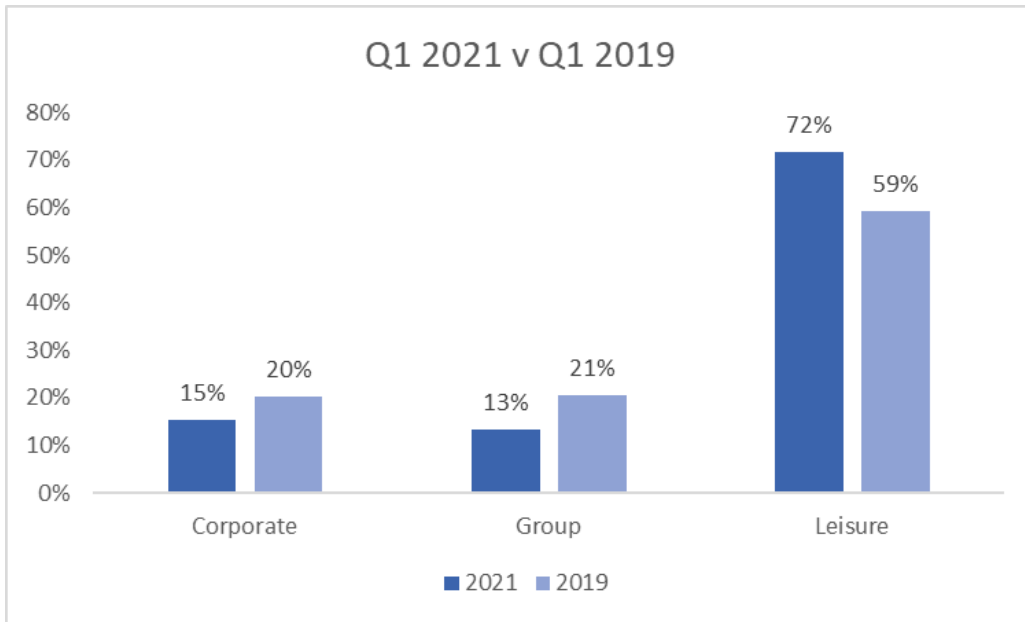
- 1.** 63% of survey respondents indicate the leisure segment will contribute most to their recovery.
- 2.** 45% say domestic leisure will be the highest contributor.



Global traveler segmentation

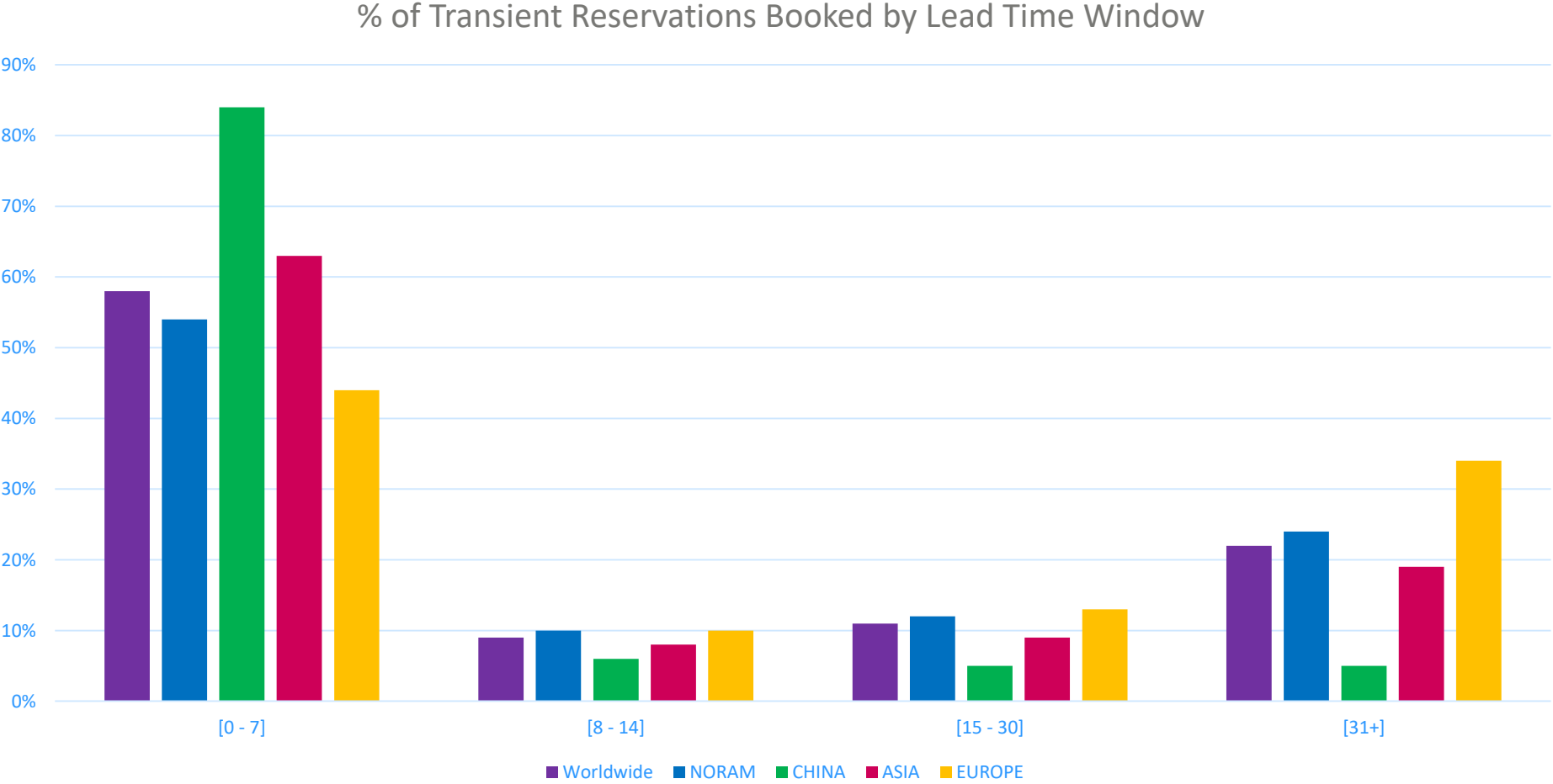
2021 vs. 2019

Global hoteliers say lack of business travel is the biggest problem they are dealing with right now.



Global booking lead time

Booking lead time by region – May 2021

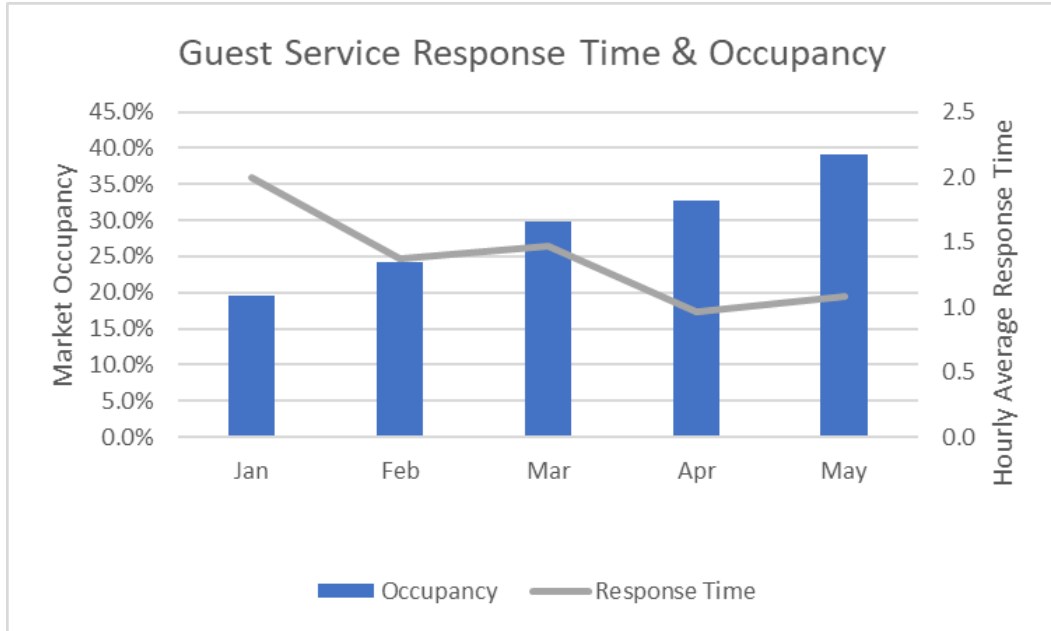


Source: Amadeus' Demand360® data as of May 28 2021

The future of operations

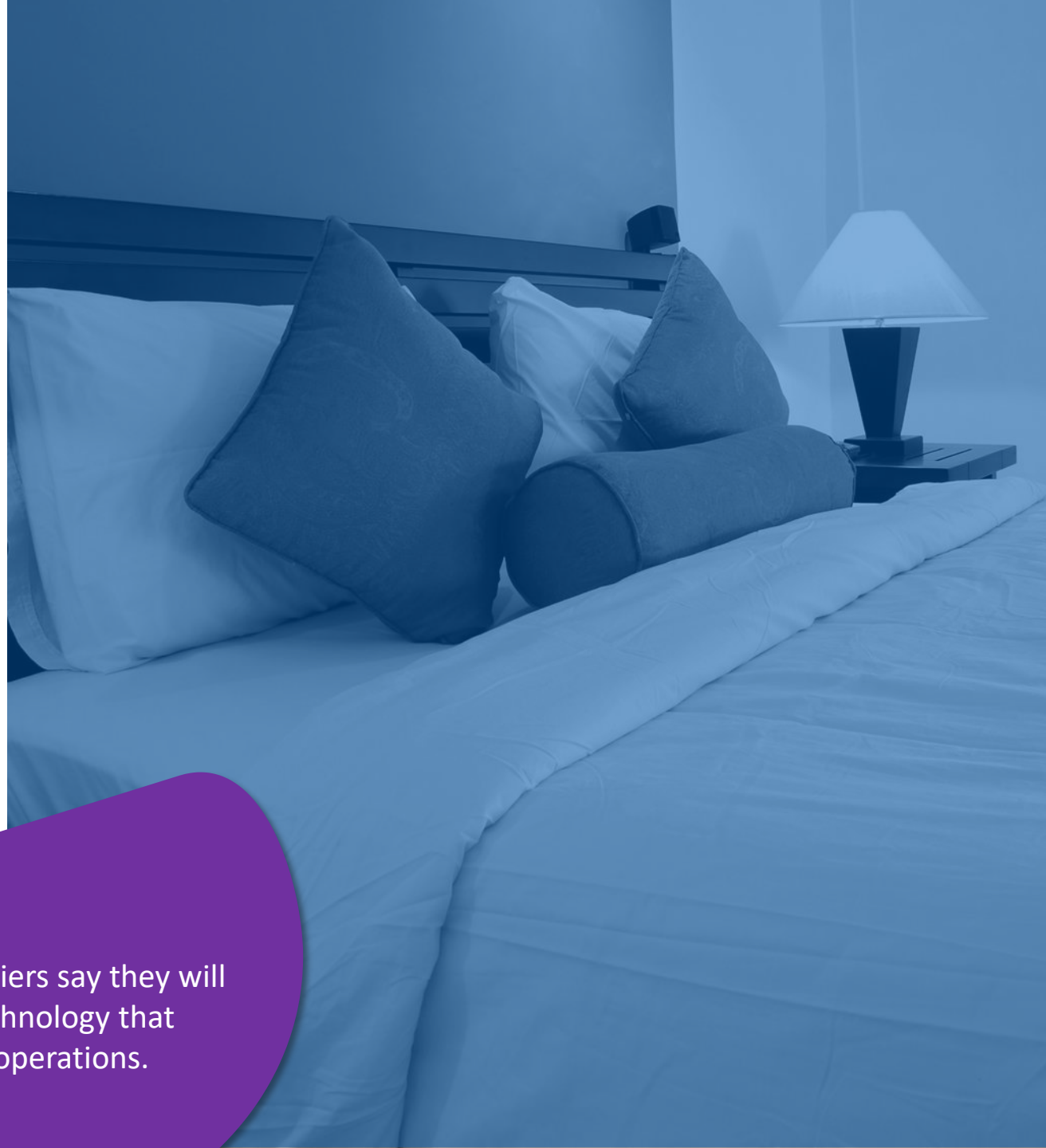
03

Welcoming back guests



Source: Amadeus Service Optimization and Business Intelligence data

25% of hoteliers say they will prioritize technology that streamlines operations.



Welcoming back guests

Reduced guest touchpoints & enhanced sanitization are here to stay

1. 21% of hoteliers plan to reduce stayover cleans.
2. 20% of hoteliers will maintain contactless deliveries of food & beverage, amenities, room service, etc.
3. 32% of hoteliers feel they will always need significant elements of hygiene measures at their property.



Prepare for what's ahead



04

Hotelier survey key takeaways

COVID-19 recovery best practices

41% of hoteliers globally report they plan to invest the same or more in IT than they did in 2019 (pre-pandemic).

30% of hoteliers are most excited about the acceleration of contactless technology to enhance the guest experience as we emerge from the pandemic.

95% of hoteliers are leveraging market performance data to monitor trends.

59% of hoteliers plan to recruit new staff in 2021, while 30% anticipate opening one or more sites this year.

Session key takeaways

COVID-19 recovery best practices

Utilize forward-looking data to understand traveler segments in your market.

Ensure your property, including specialty rooms, are visible across channels where guests are booking.

Personalize promotions and special offers to inspire guests to book at your property.

Leverage data across your business to ensure operational strategies and staff headcount can deliver the guest experience as promised.

Your recovery plan

“Rebuilding Hospitality: Trends in Demand, Data, and Technology That are Driving Recovery,” highlights the trends that have defined the industry during the pandemic as well as best practices for hoteliers to plan their recovery.



<https://www.amadeus-hospitality.com/resources/rebuilding-travel-global-recovery-report/>

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Coming soon...

The second edition of our popular eBook series containing actionable steps to rebuild your business for sales, marketing, operations, and revenue management.



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Q&A

05

Thank you

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