The Hotelier Pulse Report

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1.0 Market Trends

Take February's Survey

Key Takeaways

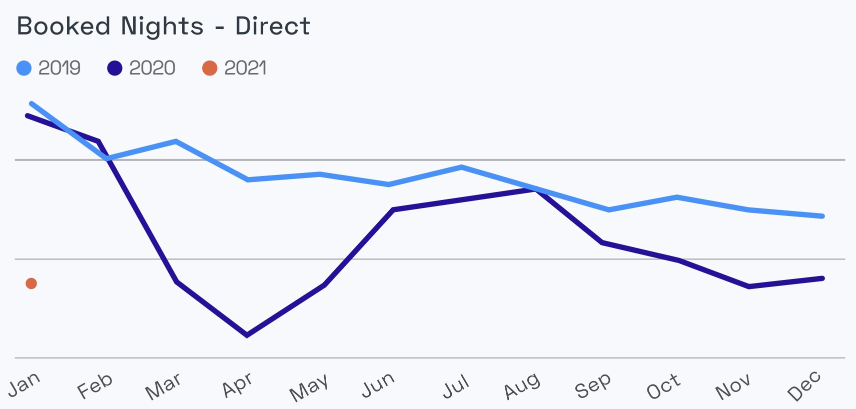
- The traditional January lift in bookings did not happen, and the trend of bookings continues downwards. Booked nights in January 2021 comprise just 21.0% of bookings over the same period in 2020.
- The start of 2021 indicates domestic travel will continue to grow. In January, Domestic bookings comprised 52.1% of total bookings - surpassing International travel for the first time since 2015.
- Since the 1st Edition of the Hotelier Pulse Report, the Direct Channel shows the smallest reduction in reservations compared to Booking, Expedia, GDS, and Others

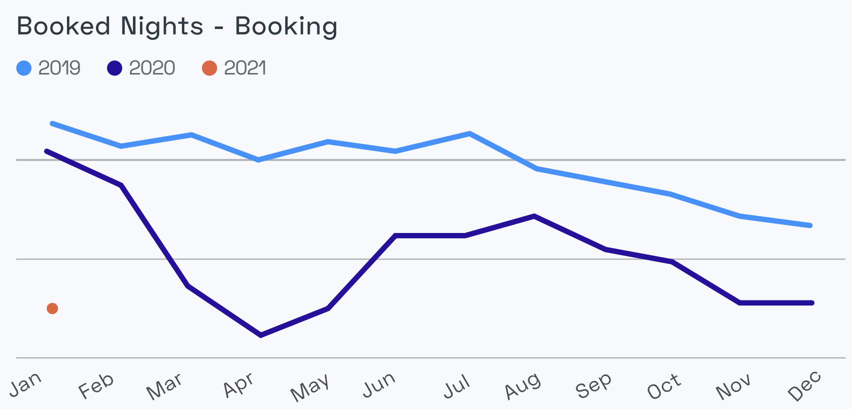
Booking & Stays Behaviour in 2021

It's a new year and a new chapter for Hoteliers on the road to recovery. Our Market Trends analysis covers booking behaviour throughout 2021, in comparison to 2020 and 2019.

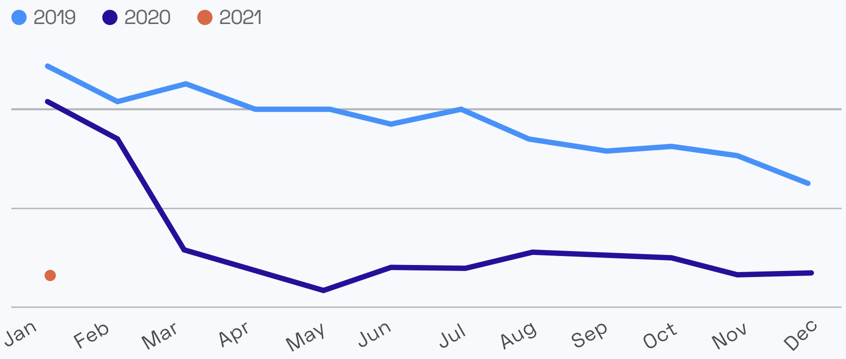
We also cover the evolution of channel performance in 2021 vs 2020 and 2019, before the pandemic impacted on check-ins and booked nights. We also analyse how each reservation channel is recovering, mobile reservations behaviour, booking pace and Domestic vs International travel trends. Analysing bookings and stays per channel from 2019 to 2021, the graphs below show how each of the 5 main channels performed. These channels are:

1. Direct 2. Booking 3. Expedia 4. GDS.

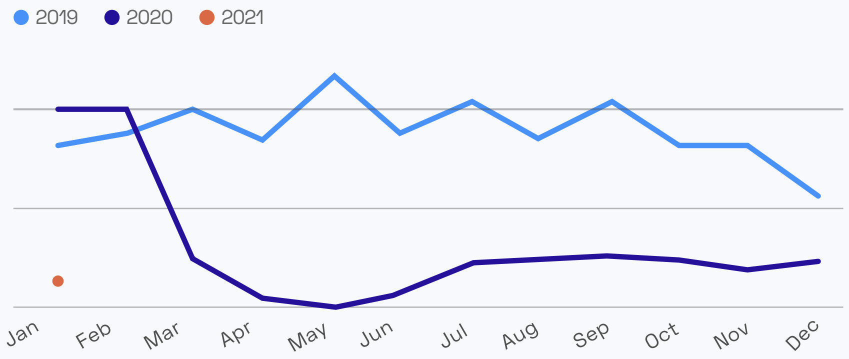




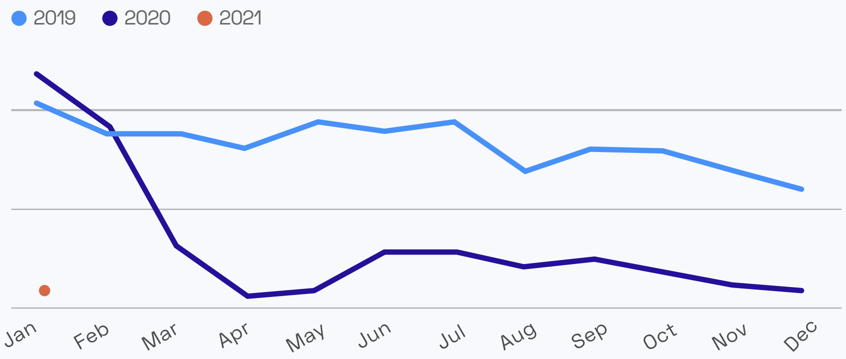
Booked Nights - Expedia



Booked Nights - GDS



Booked Nights - Others



Historically, January generates high volumes of bookings, especially in Europe. Most guests use the winter period to decide where to go throughout the year, particularly for the summer holidays. With exception of GDS, our analysis shows this trend across all channels. However, this booking behaviour has been changing since January last year.

2.1 Occupancy Expectation

Take February's Survey

Key Takeaways

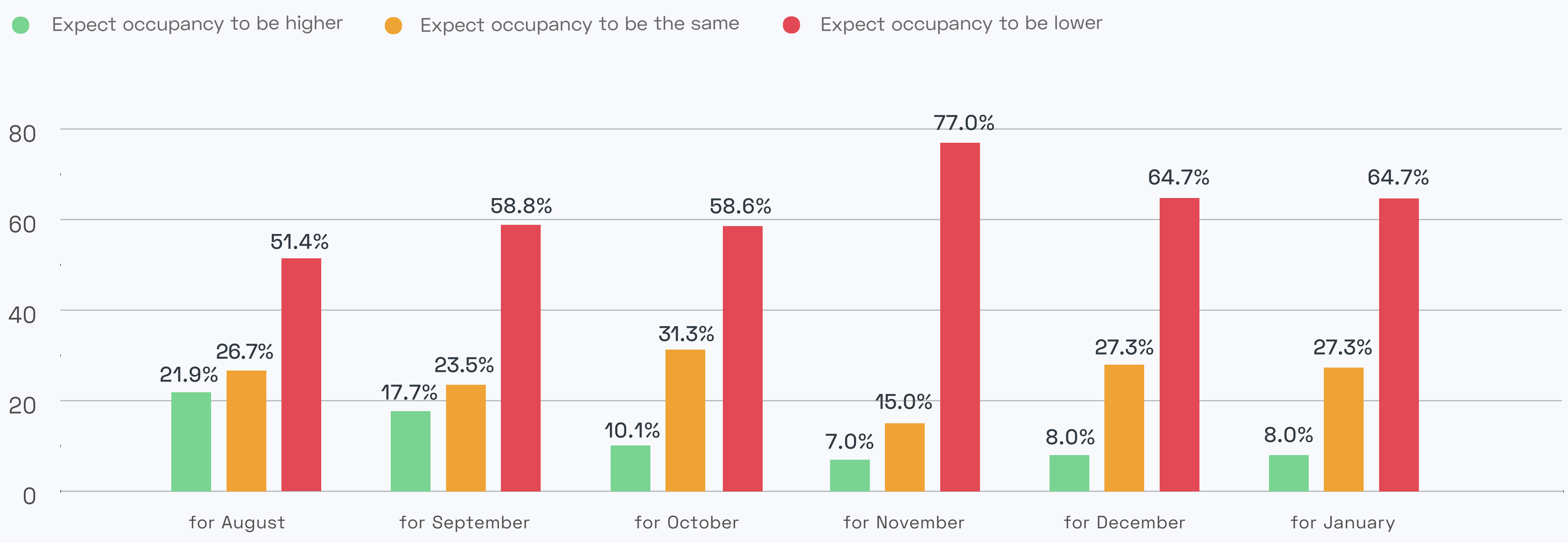
- **The monthly occupancy expectation has lowered significantly for February 2021, from 18% in January 2021 to just 12.0% today.**
- **Resorts represent the majority of respondents who expected to meet the average occupancy level anticipated for January 2021, at 28.1%.**
- **On the flip-side, only Bed & Breakfasts expect occupancy levels to increase in February 2021 at 12.4%, compared to 10.0% expected for January 2021.**

POLL:
Hoteliers we surveyed in December expected an average of **18.0%** occupancy in January. Do you expect your property to be below, the same, or above this expectation? Since we began asking Hoteliers to share their monthly occupancy expectations with us, we've seen that our respondents keep overestimating occupancy for the following month.

Of the Hoteliers we surveyed in January 2021, **72.3%** expected occupancy to be significantly lower than the **18.0%** average, which was the expectation back in December 2020.

Furthermore, **64.8%** of Hotels did not meet their occupancy expectations for December. These numbers continue to increase month by month, indicating that hoteliers now find it more difficult to make accurate forecasts.

Occupancy Expectations



What's top of Mind for Hoteliers in February 2021?

To find out, we are asking the industry:

- What is your expectation for total occupancy in February 2021?
- When do you expect to financially recover to at least 2019 levels?
- What is your number 1 priority to tackle the Covid-19 crisis and prepare for recovery?

If you want to receive the answers to these questions and more in the 12th edition of The Hotelier PULSE Report, then **please take our survey.**

Take Survey Now!