The Hotelier

Pulse Report

N.12 MARCH 2021

GREAT HOTELS OF THE WORLD

guestcentric

Market Trends

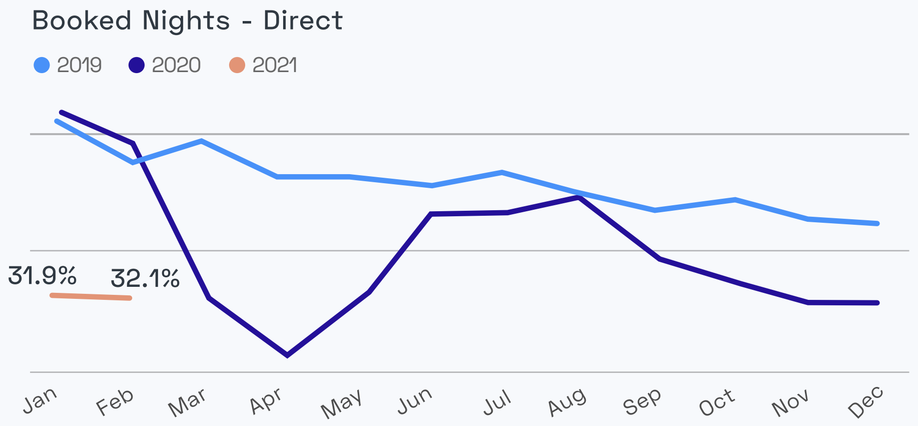
Key Takeaways

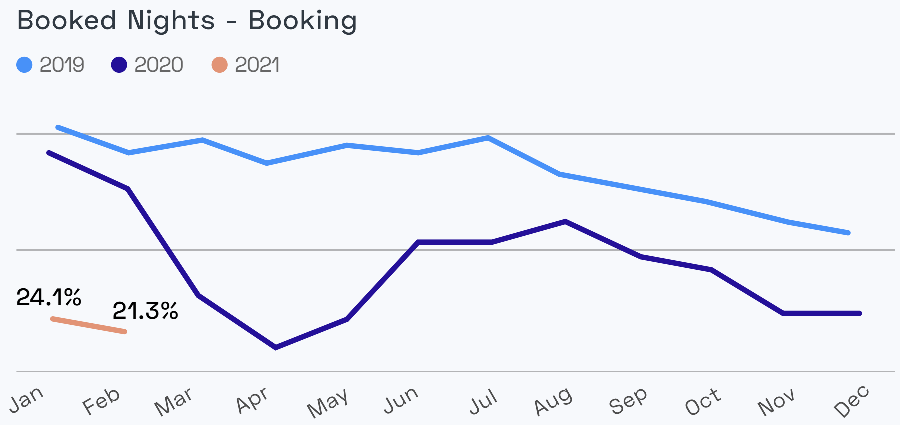
- **Booked nights across all online channels in February 2021 comprise just 21.3% of bookings over the same period in 2020.**
- **Following the UK's comprehensive plan for reopening their economy, announced on February 22, 2021, the volume of booked nights spiked dramatically. On February 23rd, hotel bookings rose to 76.0% of nights booked over the same period in 2020.**
- **February 2021 registered the largest volume of mobile booked nights compared to the past few years, surpassing 30.0% of total bookings for the first time since 2015.**

Booking & Stays Behaviour in 2021

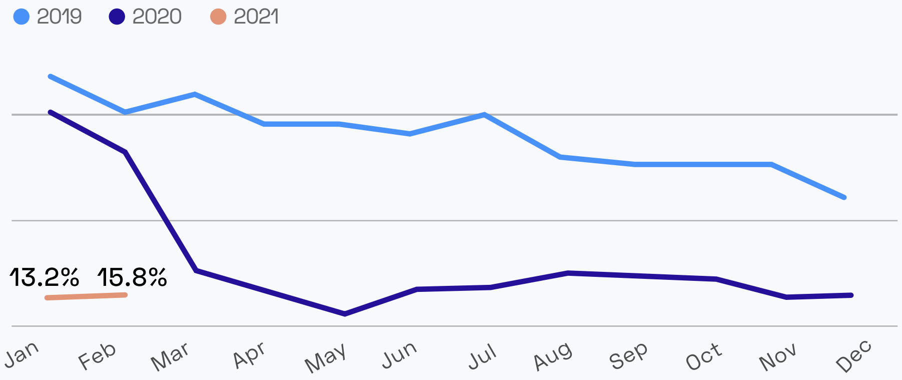
Our Market Trends analysis covers booking behaviour throughout 2021 to date, in comparison to the same period in 2020. We also cover the evolution of channel performance in 2021 vs 2020, how each reservation channel is recovering, mobile reservations behaviour, booking pace, Domestic vs International travel trends, and the latest world news that has impacted your hotel bookings in recent weeks. Analysing bookings and stays per channel from January 2020 to February 2021, the graphs below show how each of the 5 main channels performed. These channels are:

1. Direct **2. Booking** **3. Expedia** **4. GDS** **5. Others**

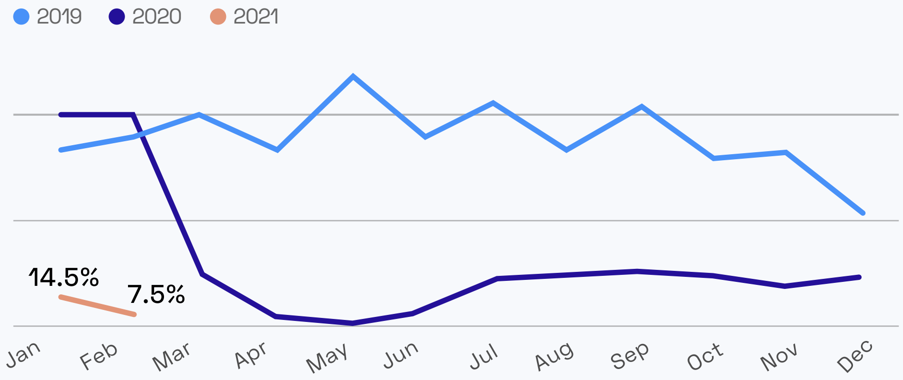




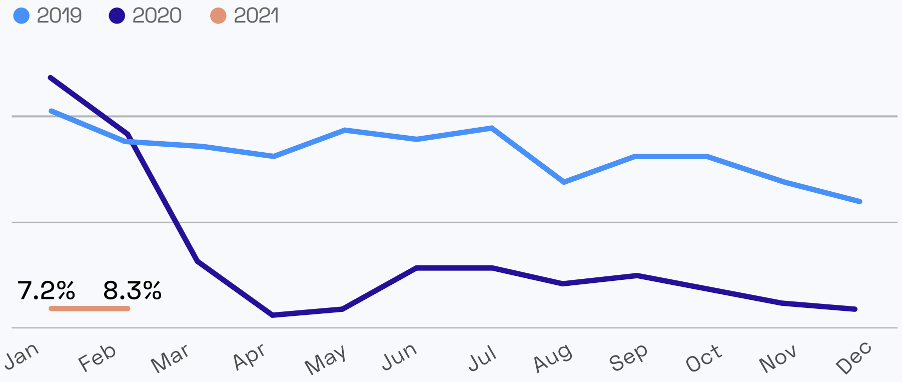
Booked Nights - Expedia



Booked Nights - GDS



Booked Nights - Others



Fresh waves of cases, restrictions and flight bans continue to impact hotel bookings across all channels. However, some channels are more resilient than others. We can see that booked nights in February 2021 comprise just **21.3%** of bookings over the same period in 2020, right before the pandemic started and various restrictions were put in place.

The Direct Channel continues to be the most resilient since the 1st Edition of the Hotelier PULSE Report, showing the smallest reduction in reservations compared to the same period in 2020, outperforming the major OTAs and all other reservation channels.

In February 2021, our analysis shows the Direct channel generated **32.1%** of total nights booked in February 2020 (vs **31.9%** in January 2021 vs 2020). In second place is Booking, which in February 2021 generated **21.3%** of the nights booked over the same period in 2020. Compared with January 2021, the Direct channel's volume of reservations in February 2021 vs 2020 increased **1.0%**, while Booking decreased **3.0%**.

Expedia sits in 3rd place, generating **15.8%** of February 2021 nights booked compared to February 2020. Others (which represents all other channels including wholesalers, tour operators, smaller groups, etc.) generated **8.3%**, while GDS generated just **7.5%** of bookings over the same period in 2020.

Compared to our February 2021 results, GDS and Booking had a lower volume of nights booked vs the same period in 2020, while Direct, Expedia and Others increased.

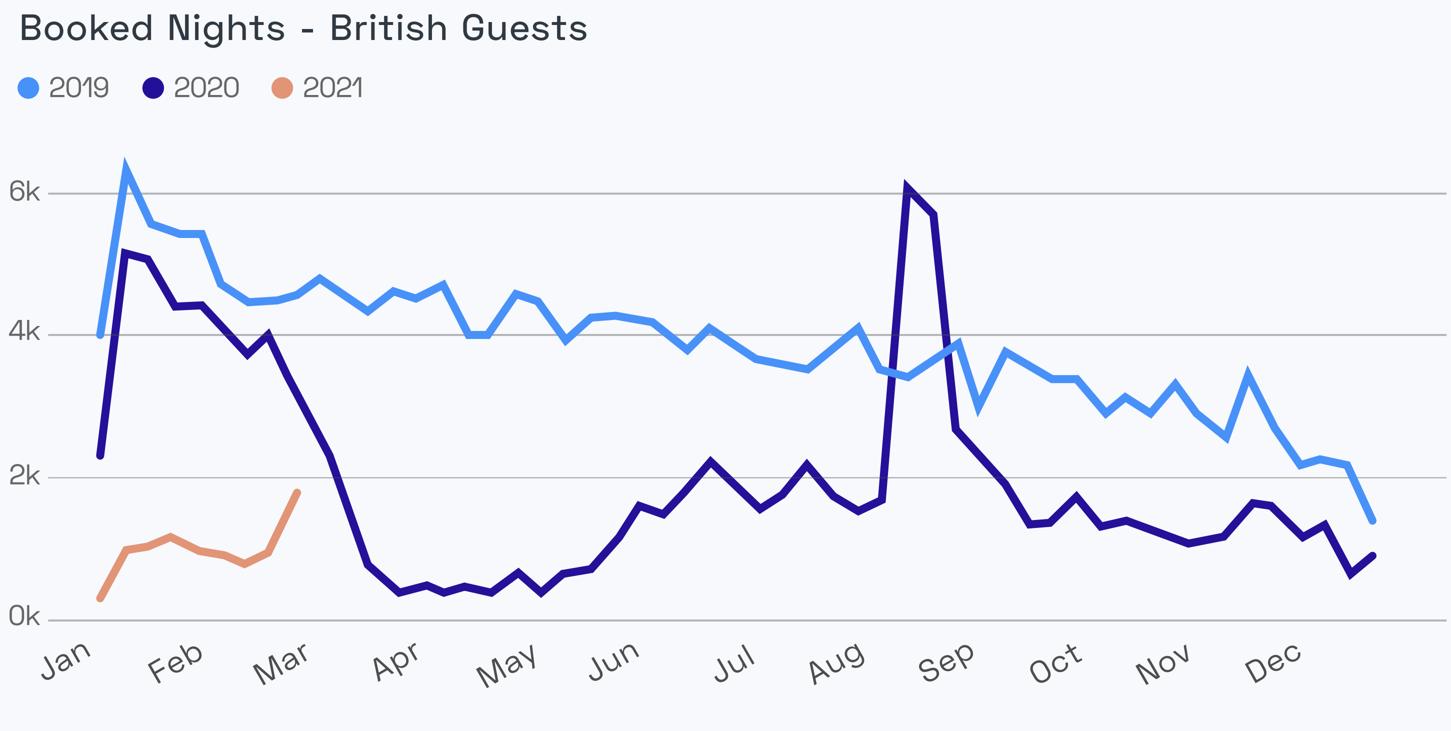
Looking at the overall results for February 2021, here are the total booked nights for each channel by order of performance compared to bookings in February 2020 and also to February 2019:

Vs 2020

Direct: 32.1%
Booking: 21.3%
GDS: 7.5%
Expedia: 15.8%
Others: 8.3%

Vs 2019

Direct: 33.4%
Booking: 17.4%
GDS: 15.8%
Expedia: 8.6%
Others: 8.6%



On a more optimistic note, the UK has recently announced a comprehensive plan for reopening their economy with target dates on opening up certain activities. The target date for life back to normal is June 21st. As you can see in the graph above, his positive news has not only led to a massive increase in airline bookings, but also in hotel bookings by British guests.

Occupancy Expectations

Key Takeaways

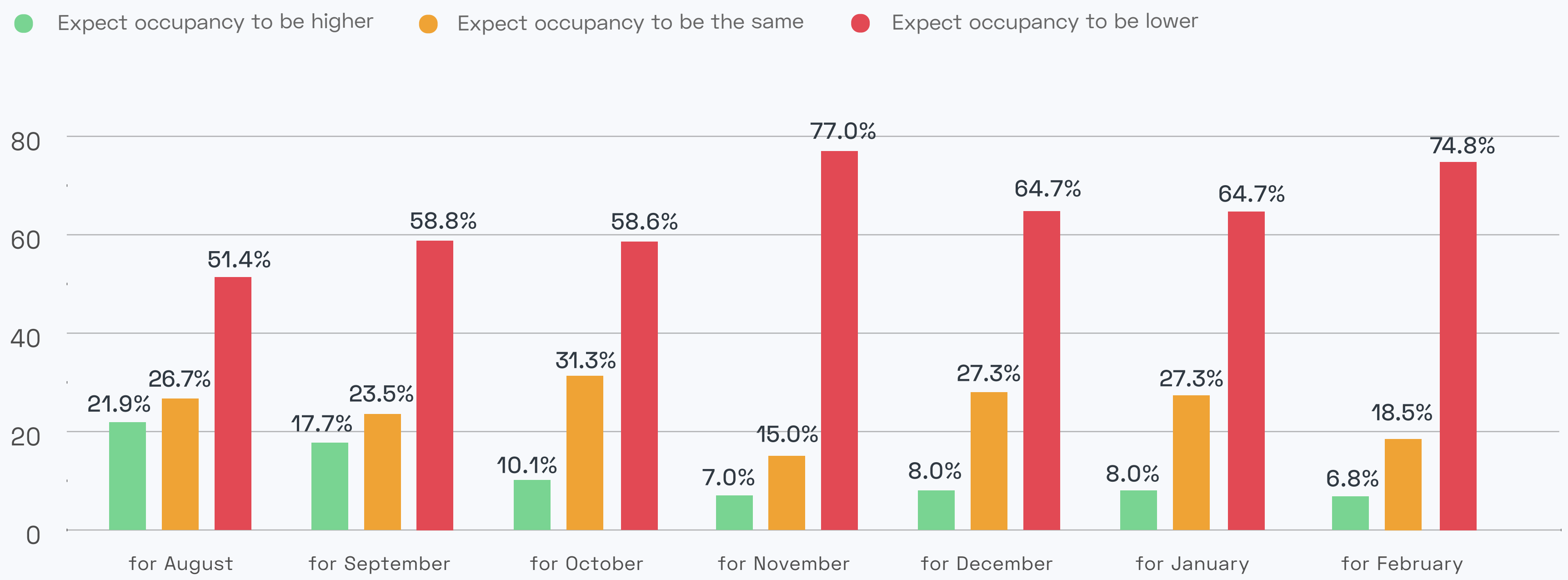
- There was an increase of around 1.5% in Hoteliers exceeding the average occupancy expectation for February 2021 vs occupancy expected for January 2021.

- Bed & Breakfasts represent the majority of respondents saying they do not expect to meet the average 12.0% occupancy expected for February 2021. Resorts represent the majority of respondents expecting to meet the average occupancy level expected for February 2021.

- The average monthly occupancy expectancy for Hoteliers has increased for March 2021 - from 12.0% in February 2021 to 15.0% today.

POLL:
Hoteliers we surveyed in January expected an average of **12.0%** occupancy in February. Do you expect your property to be below, the same, or above this expectation?

Occupancy Expectations



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

To find out, we are asking the industry:

What is your expectation for total occupancy in March 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 13th edition of The Hotelier PULSE Report, then **please take our survey.**

Go To Survey →