HSMA Deutschland e.V

Und jetzt?

Eine Reflektion, ein Lernprozess und ein Blick nach vorne

Christiane Schmidt
Amadeus IT Group
13 December 2021

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Amadeus in a few words: Our customers

travel agencies, online travel agencies, tour operators and corporations worldwide

480+ airlines

128 airport operators

129 ground handlers

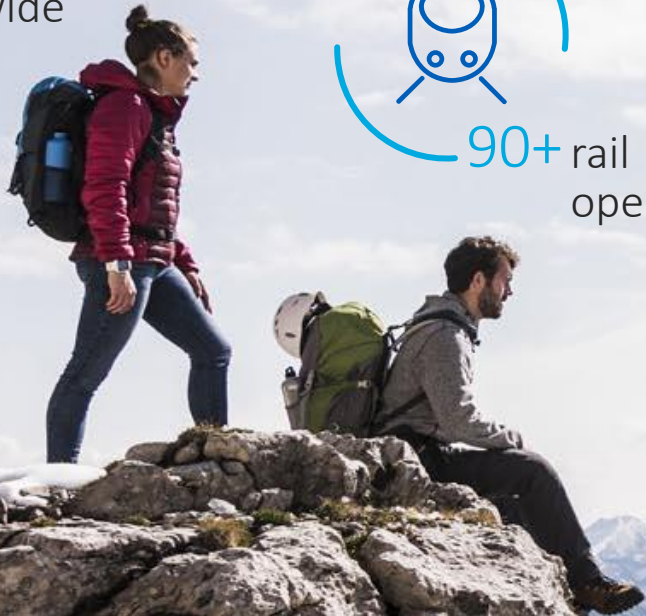+1.6M unique hotels

90+ rail operators
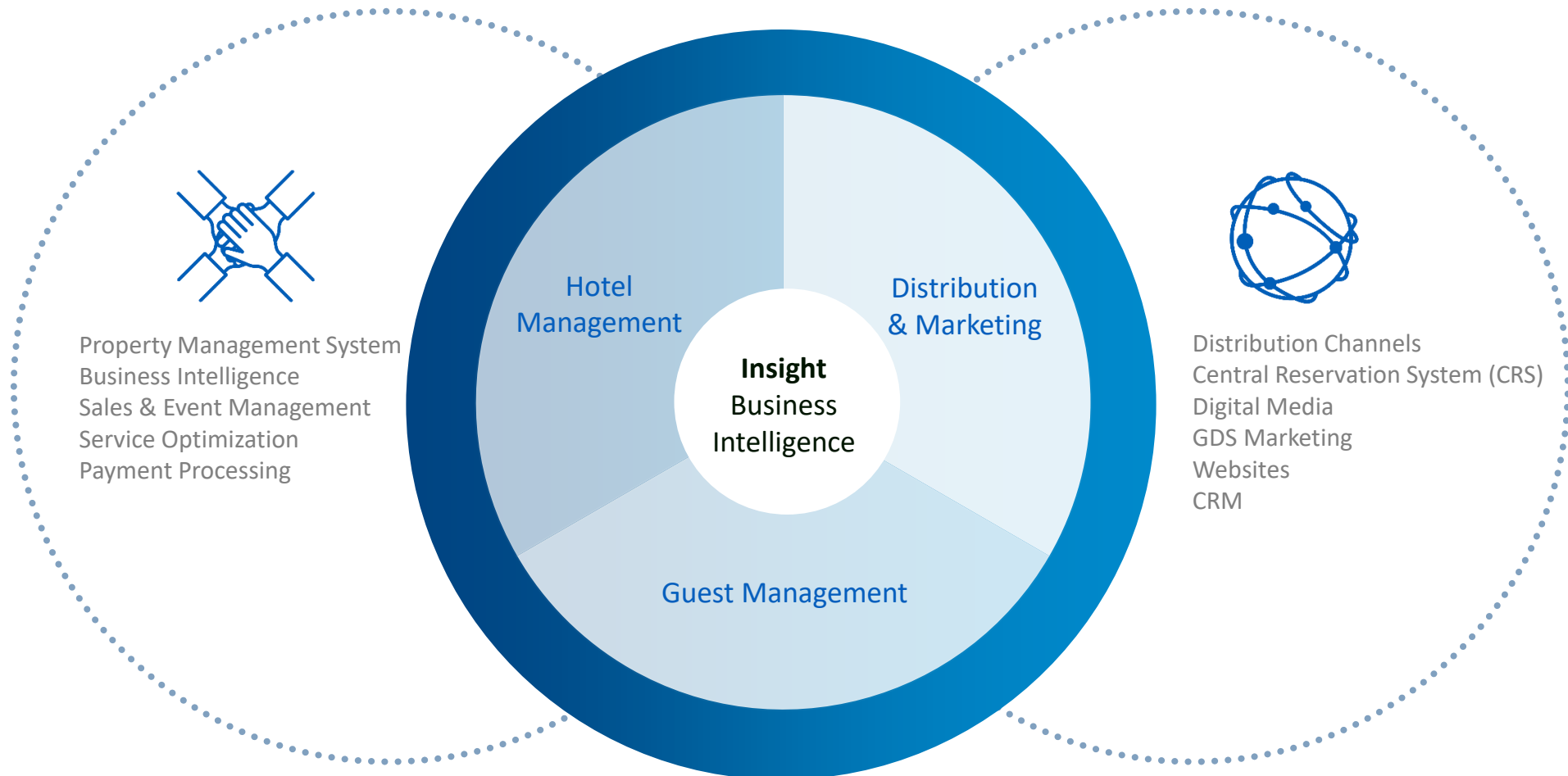
69 mobility providers

32 insurance provider groups

21 cruise and ferry lines

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Amadeus Hospitality - Drive Profitable Demand and Enhance the Guest Experience

Property Management System
Business Intelligence
Sales & Event Management
Service Optimization
Payment Processing

Hotel Management

Distribution & Marketing

Insight
Business
Intelligence

Guest Management

Distribution Channels
Central Reservation System (CRS)
Digital Media
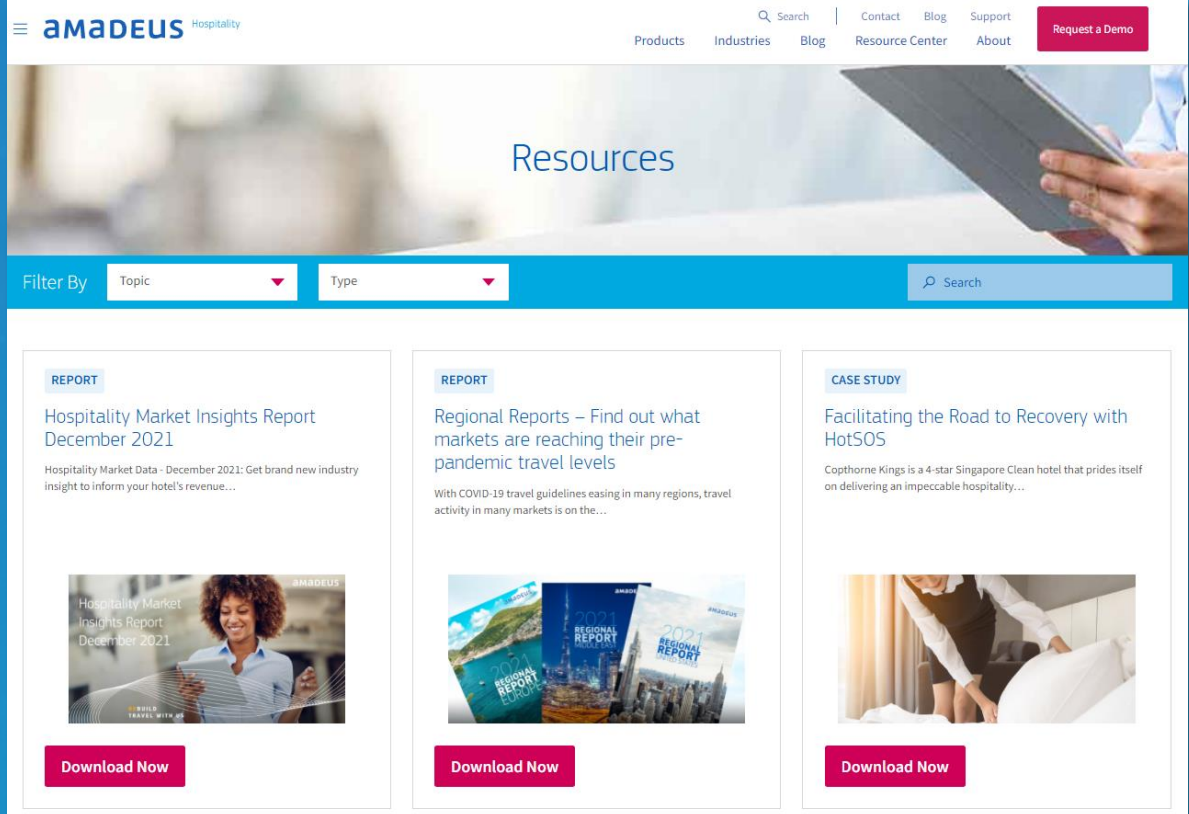GDS Marketing
Websites
CRM

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Die Reise zu einer integrierten Plattform hat begonnen

In den kommenden Jahren werden wir unsere Produkte weiter zusammenführen, sodass Sie die Vorteile einer integrierten Plattform nutzen können
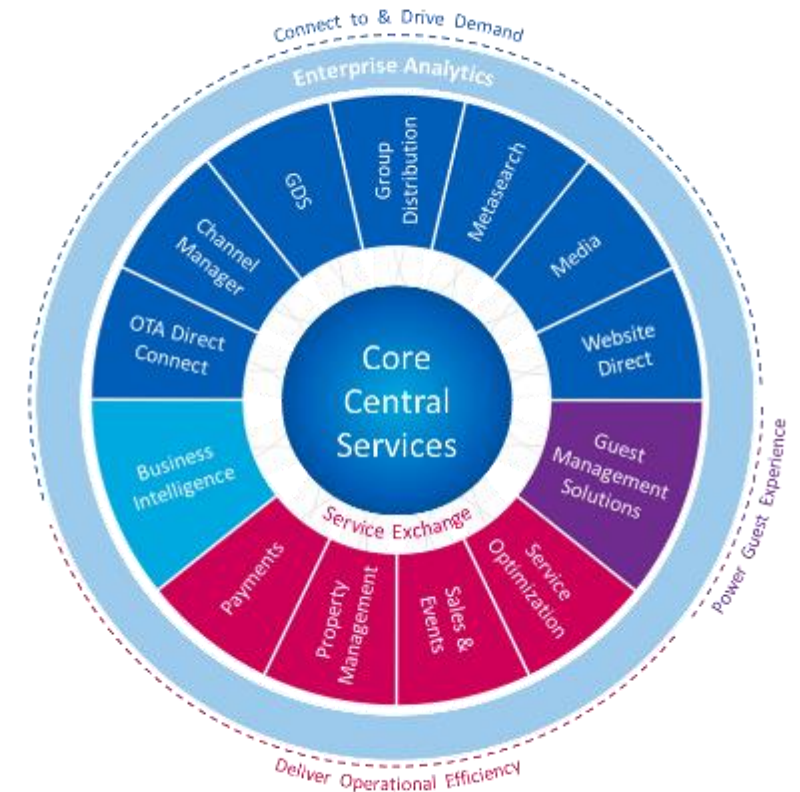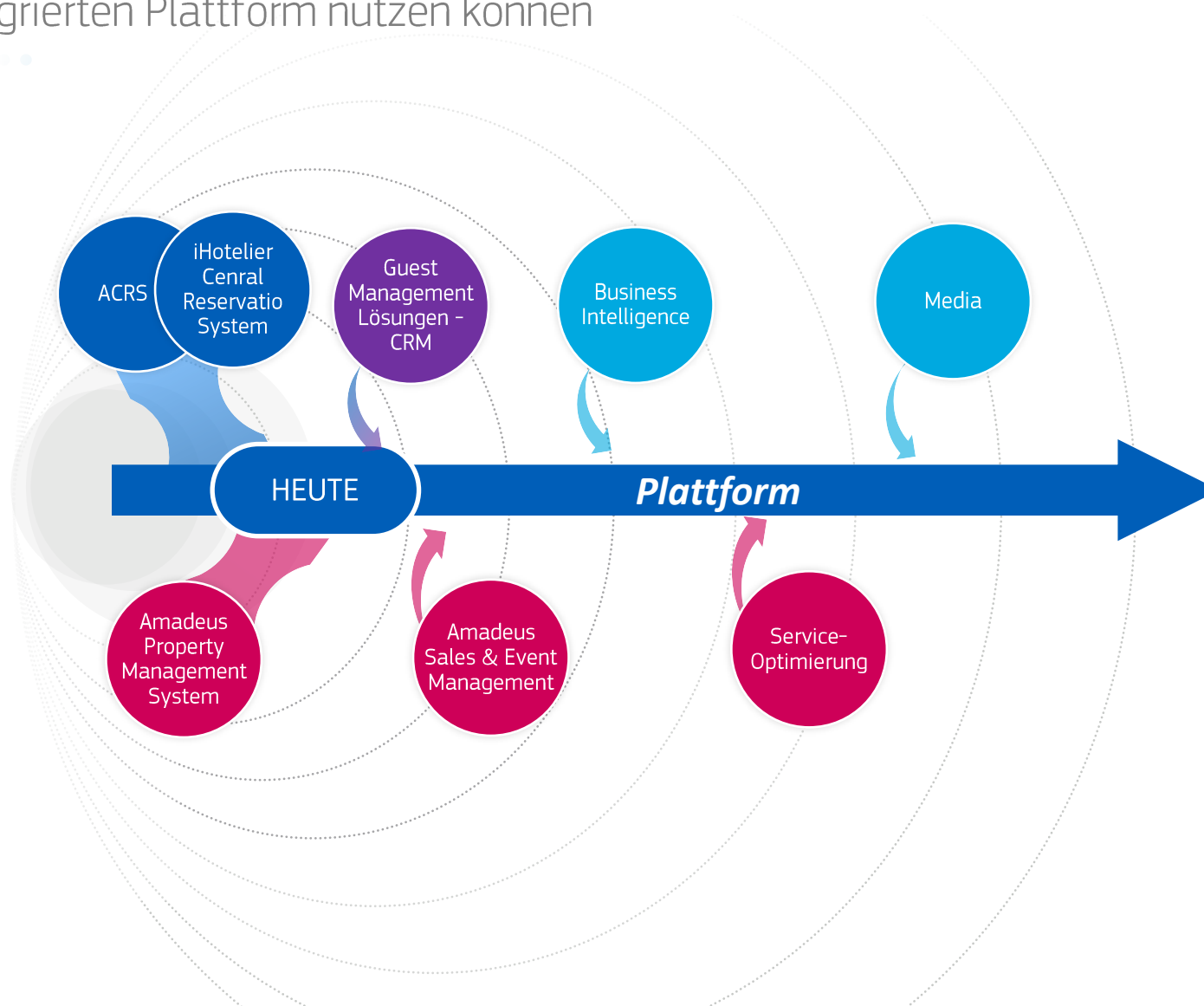
Amadeus Rebuilding Hospitality - Resources

- [Rebuilding Hospitality](#)

- [Win Guest Loyalty with Your COVID-10 Communication Strategy](#)

- [Hotel Management in a Crisis](#)

- [Generate Bookings During COVID-19 with Digital Advertising](#)

- [How to Lean on Your CRM During Tough Times](#)

- [Meetings and Events in Times of Social Distancing](#)

- [How to Manage Your Hotel's Revenue Strategy During a Crisis](#)

- [Our original Planning for Hospitality Recovery eBooks](#)

- [How to Promote Destinations when Travel is Restricted](#)

Vorstellung

● ● ● ● ●

Christiane Schmidt

Director of Sales

8 Years with Amadeus Hospitality

Christiane started in the Hotel industry as an apprentice in Garmisch-Partenkirchen, then studied Hotel Management in Heidelberg and Florida and has worked in various roles within the industry for Starwood Hotels in Boston, New York City and Washington DC before moving to Berlin as Regional Director Sales & Marketing for Westin Hotels. In 2013 she took on the role as Director of Sales for Germany & Switzerland at Amadeus Hospitality and used her hotel experience to support clients, advise them on relevant technology and consult on strategies.

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Agenda

01 Market Insights Germany

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02 Google City Statistics

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03 Takeaways for the Hospitality Industry

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Agenda

01   Market Insights Germany

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Monthly Occupancy | Europe
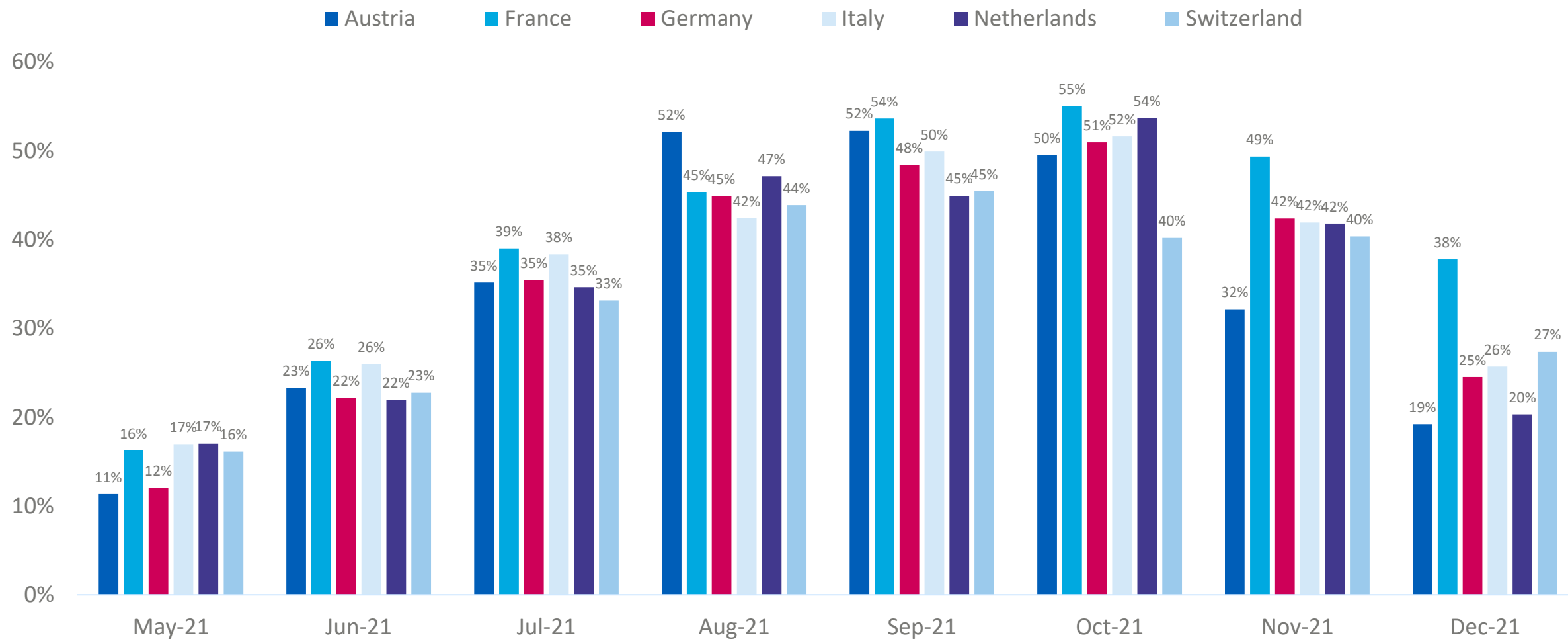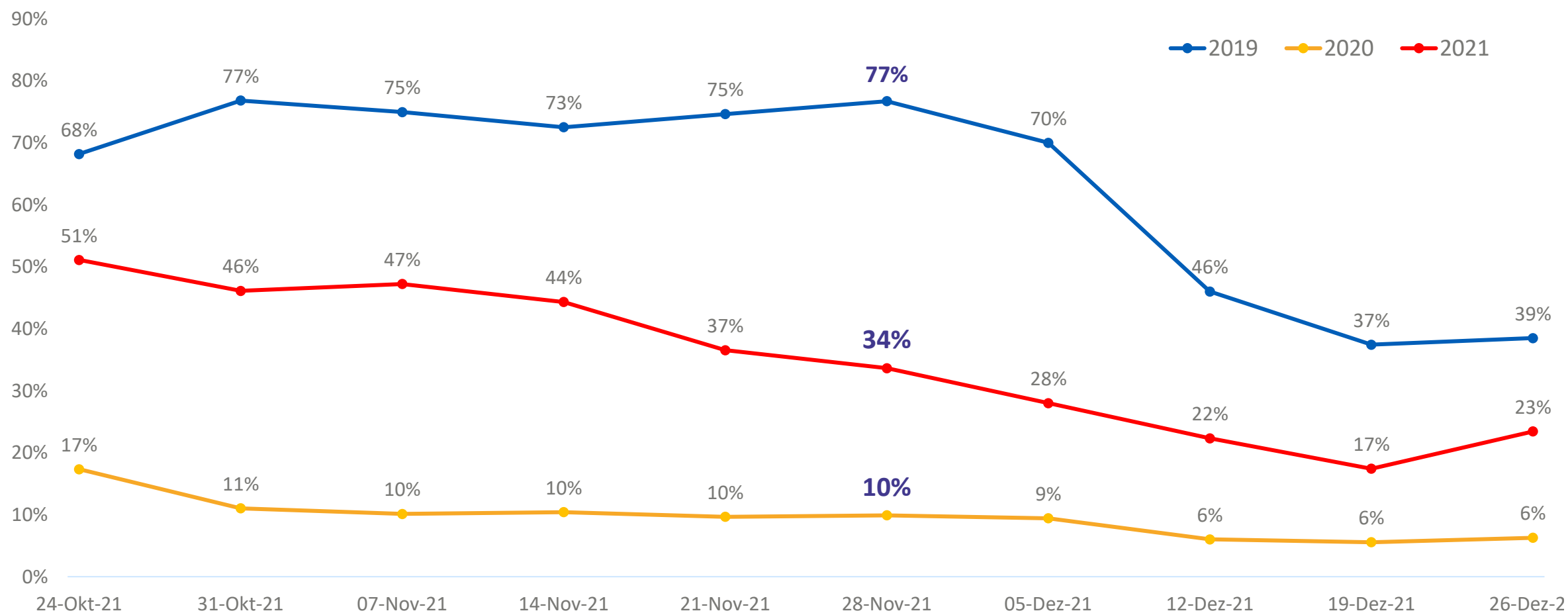
Austria ■ France ■ Germany ■ Italy ■ Netherlands ■ Switzerland

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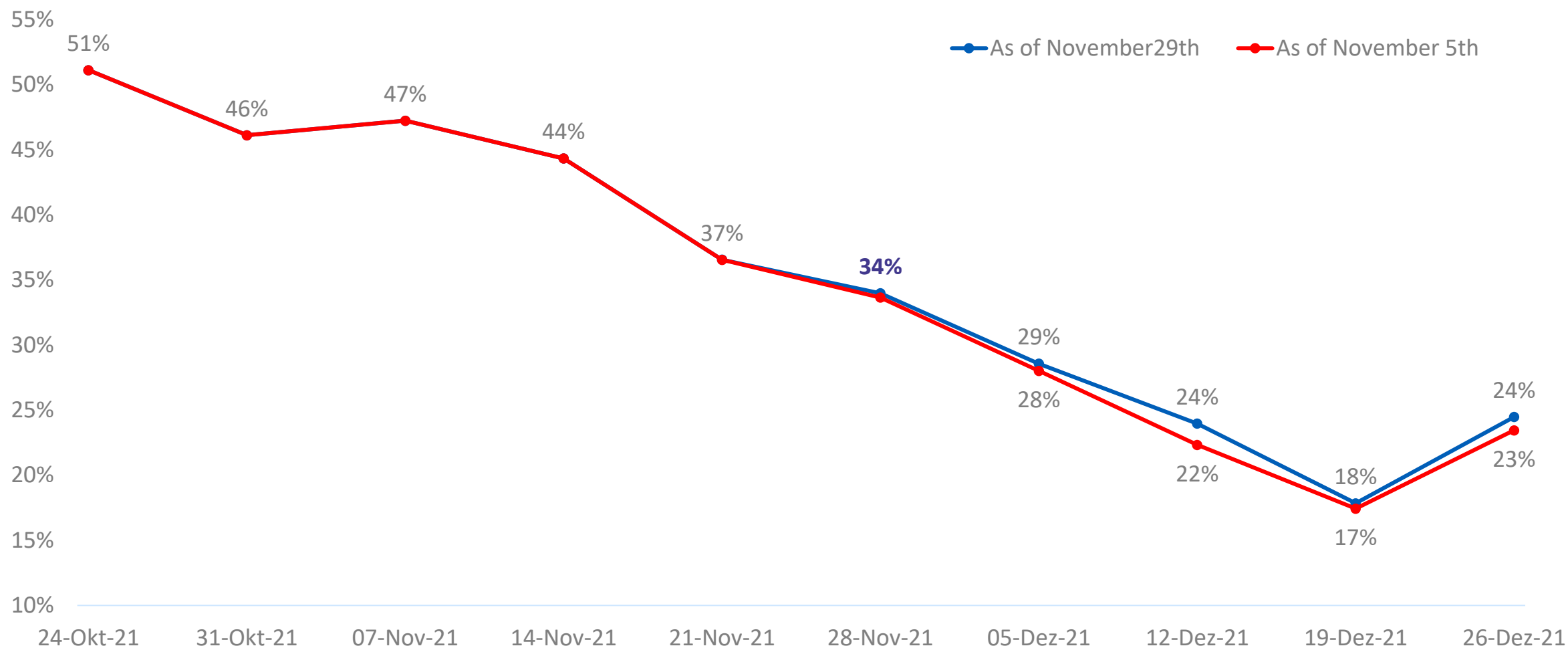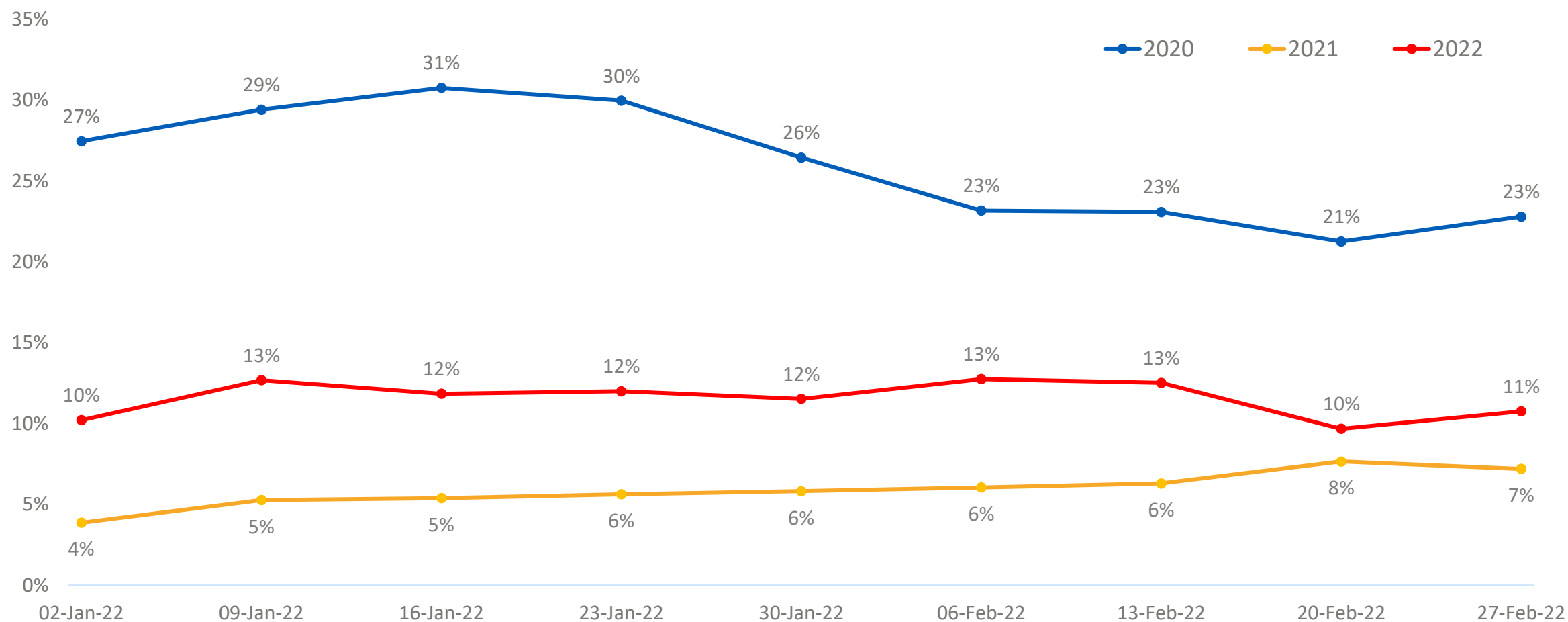
Jan/Feb 2022 week over week| Deutschland

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Occupancy | Deutschland Key Markets

Legend: Berlin, Cologne, Dresden, Frankfurt, Hamburg, Leipzig, Munich, Stuttgart

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Q4 Occupancy | Deutschland Key markets

Legend: Berlin, Cologne, Dresden, Frankfurt, Hamburg, Leipzig, Munich, Stuttgart

10-Oct-21: Berlin 52%, Cologne 63%, Dresden 71%, Frankfurt 39%, Hamburg 57%, Leipzig 58%, Munich 51%, Stuttgart 45%

17-Oct-21: Berlin 60%, Cologne 50%, Dresden 72%, Frankfurt 42%, Hamburg 64%, Leipzig 55%, Munich 52%, Stuttgart 42%

24-Oct-21: Berlin 59%, Cologne 56%, Dresden 67%, Frankfurt 43%, Hamburg 54%, Leipzig 52%, Munich 46%, Stuttgart 50%

31-Oct-21: Berlin 55%, Cologne 47%, Dresden 65%, Frankfurt 39%, Hamburg 51%, Leipzig 61%, Munich 38%, Stuttgart 40%

07-Nov-21: Berlin 56%, Cologne 52%, Dresden 52%, Frankfurt 42%, Hamburg 45%, Leipzig 51%, Munich 41%, Stuttgart 45%

14-Nov-21: Berlin 43%, Cologne 55%, Frankfurt 41%, Dresden 45%, Hamburg 46%, Leipzig 45%, Munich 42%, Stuttgart 38%

21-Nov-21: Berlin 42%, Cologne 49%, Frankfurt 19%, Dresden 36%, Hamburg 44%, Leipzig 33%, Munich 29%, Stuttgart 34%

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Q4 & next weeks Occupancy | Deutschland markets

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Q4 ADR | Deutschland

Legend: 2019, 2020, 2021

Date	2019	2020	2021
24-Okt-21	$137	$125	$149
31-Okt-21	$176	$119	$145
07-Nov-21	$156	$127	$152
14-Nov-21	$159	$124	$159
21-Nov-21	$147	$122	$141
28-Nov-21	$148	$122	$143
05-Dez-21	$146	$127	$142
12-Dez-21	$132	$130	$142
19-Dez-21	$128	$143	$137
26-Dez-21	$156	$187	$164

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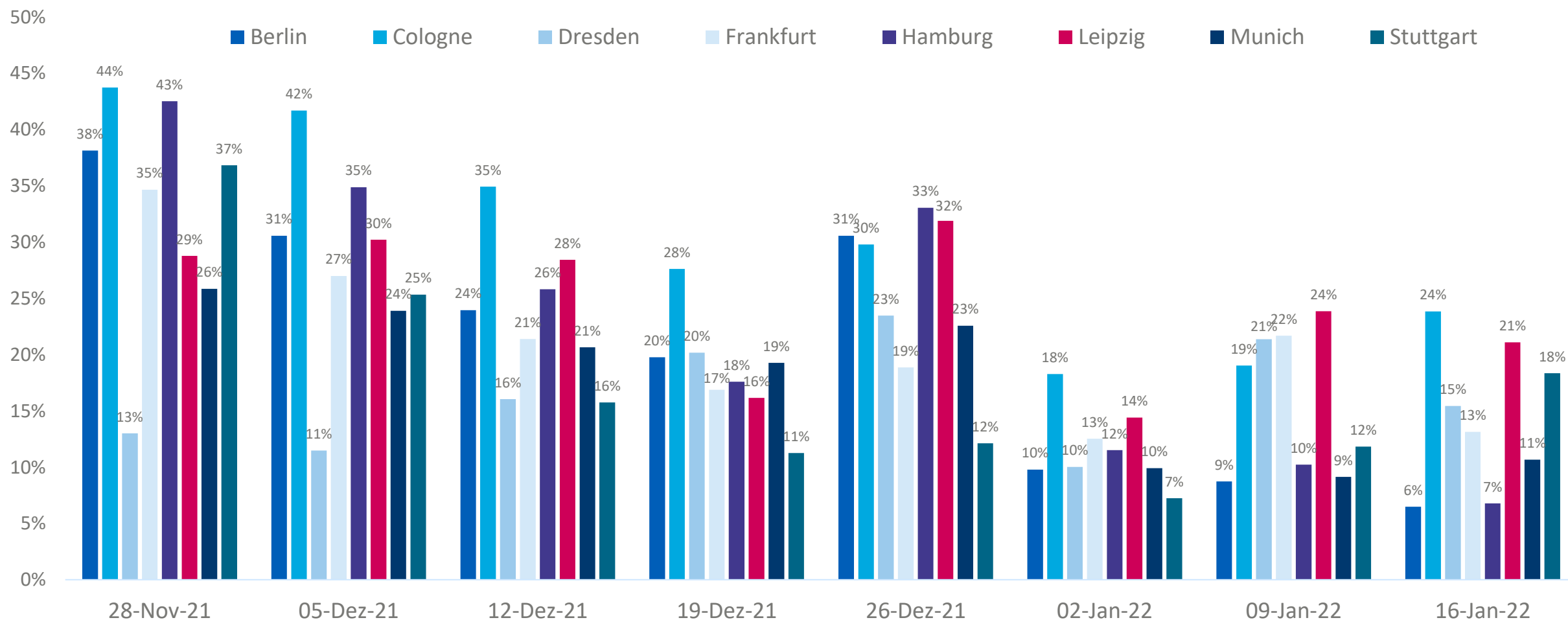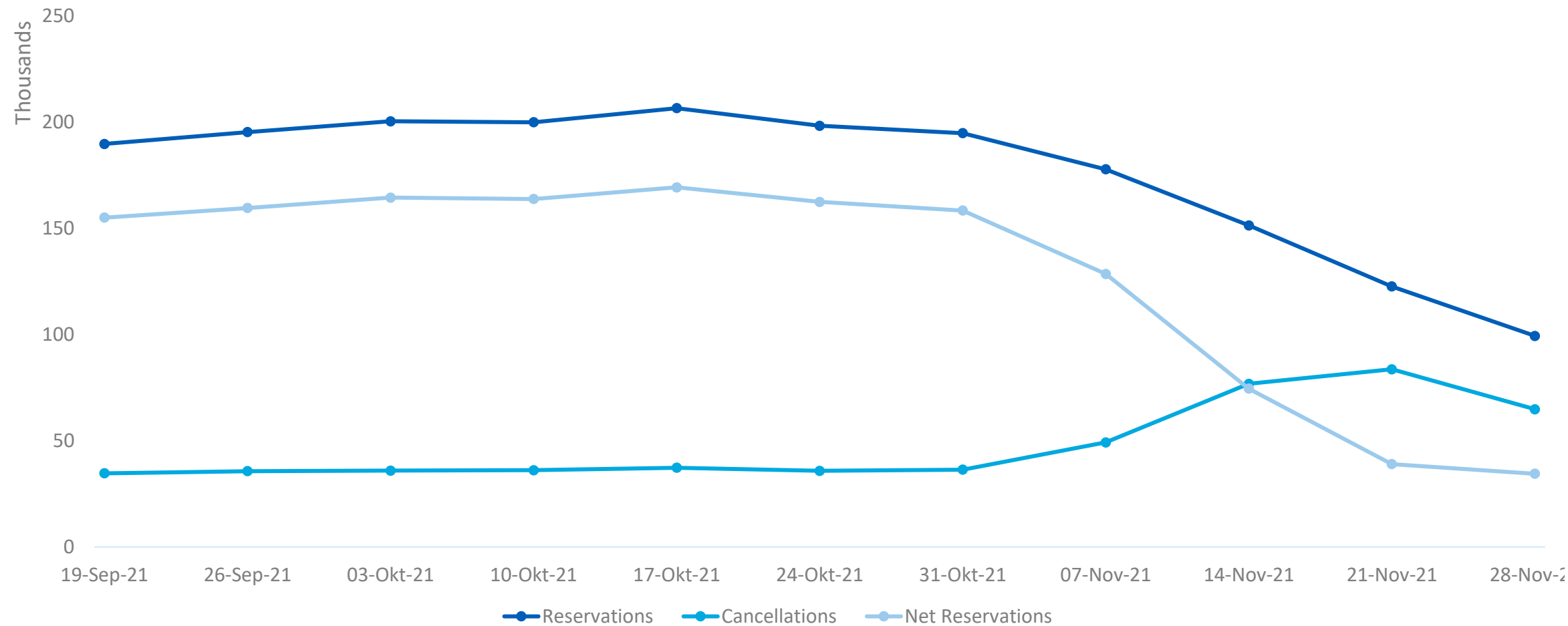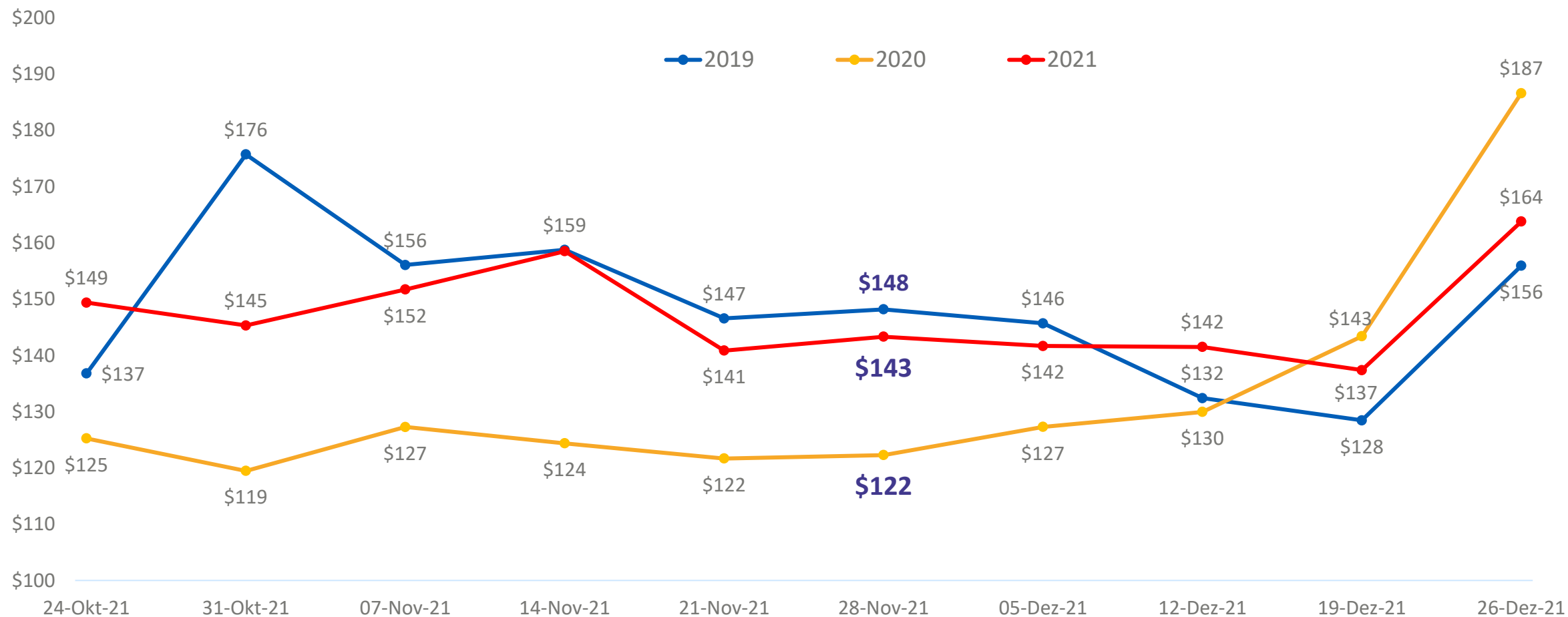
Lead time last 5 weeks & YoY | Deutschland
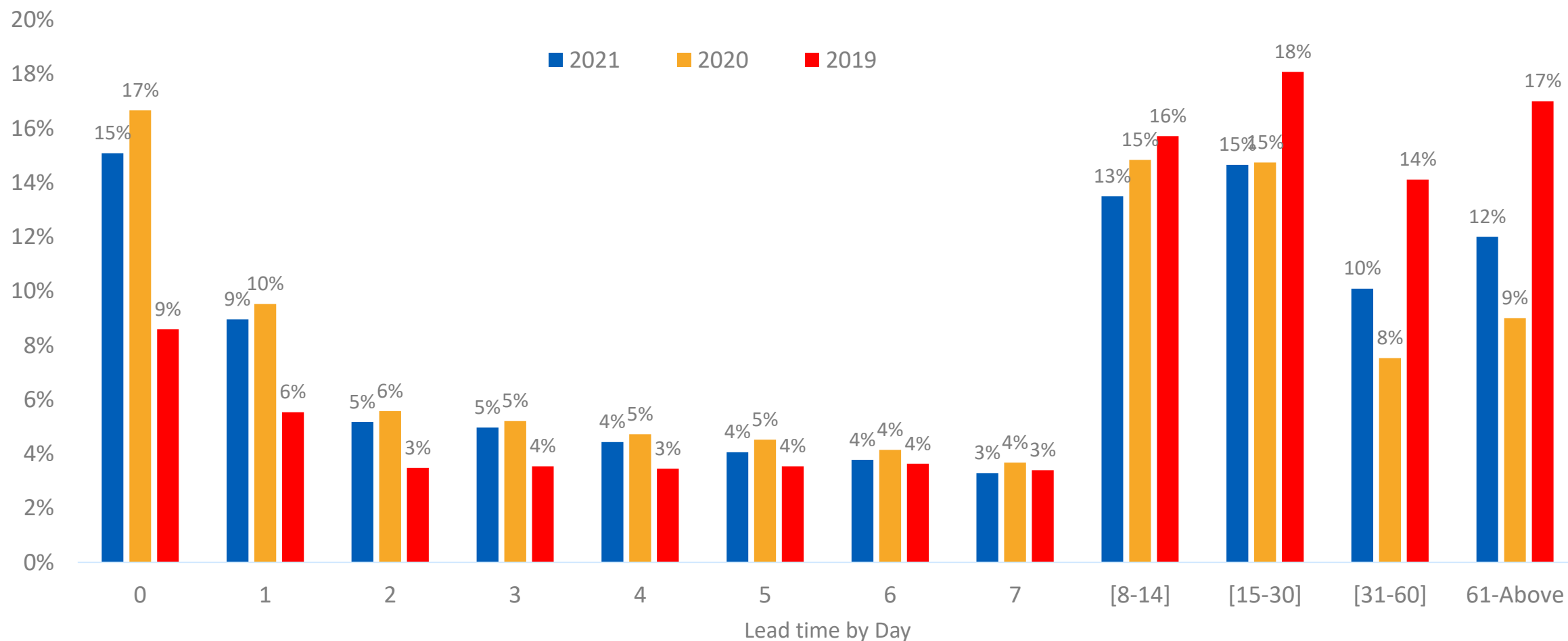
Lead time Sep & Oct vs YoY | Deutschland

Booking Lead Time Market Summary
Market: Germany
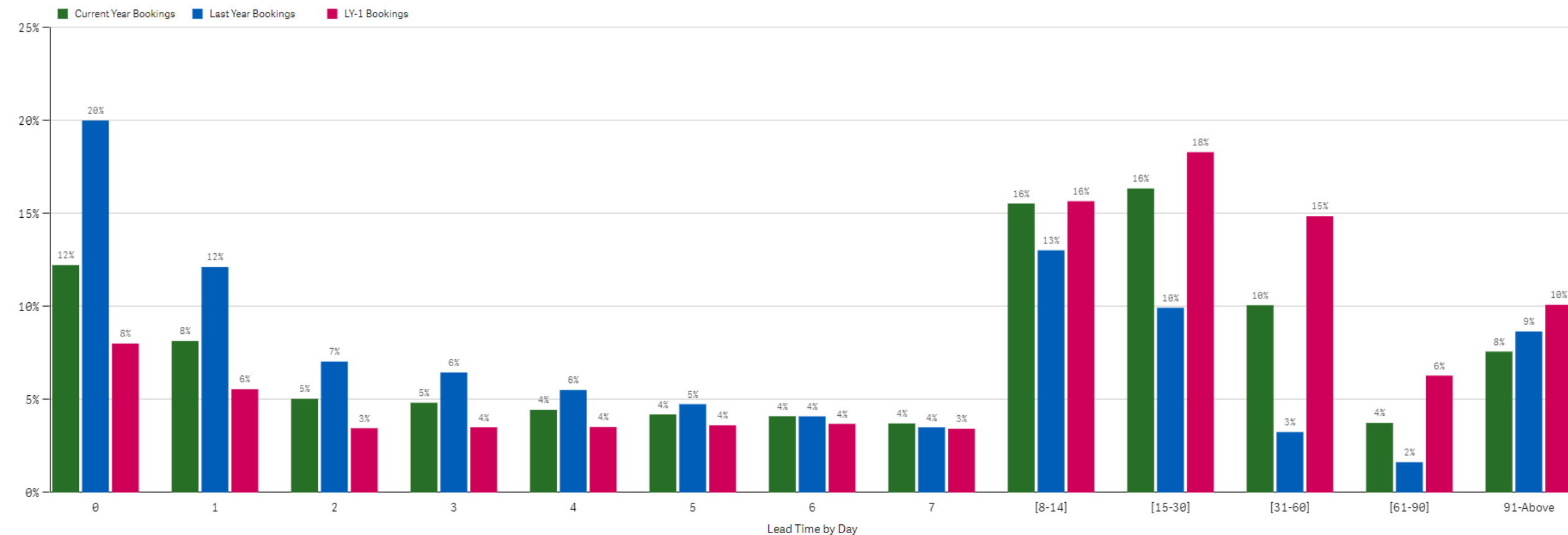
Q4 segmentation YoY | Deutschland

Q4 2021

- Wholesale 3%
- Retail 21%
- Qualified 2%
- Other 4%
- Negotiated 13%
- Discount 41%
- Group Sold 15%

Q4 2020

- Qualified 2%
- Retail 27%
- Wholesale 2%
- Other 5%
- Negotiated 13%
- Discount 38%
- Group Sold 13%

Q4 2019

- Qualified 3%
- Other 4%
- Retail 20%
- Wholesale 3%
- Negotiated 18%
- Discount 29%
- Group Sold 23%
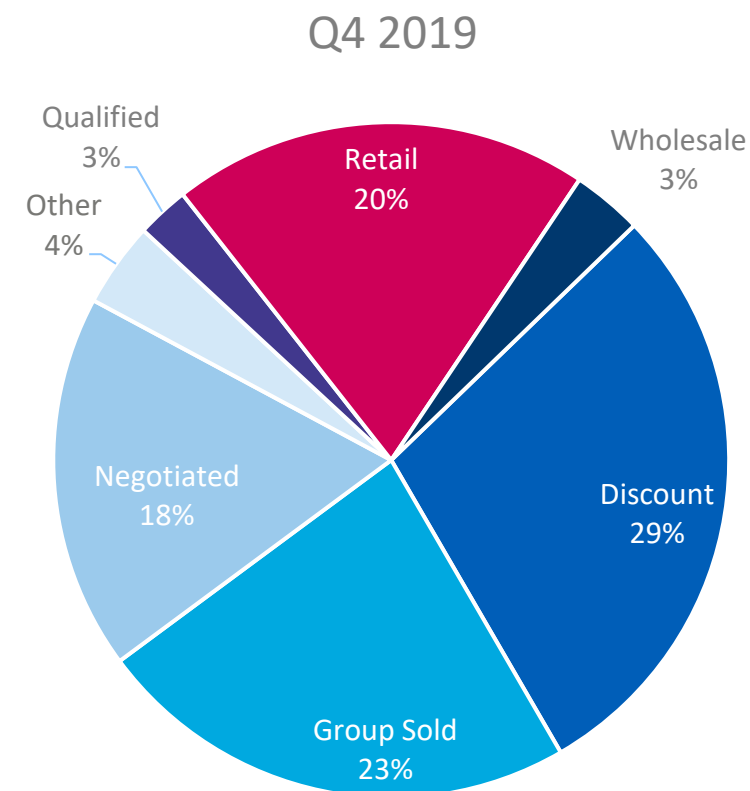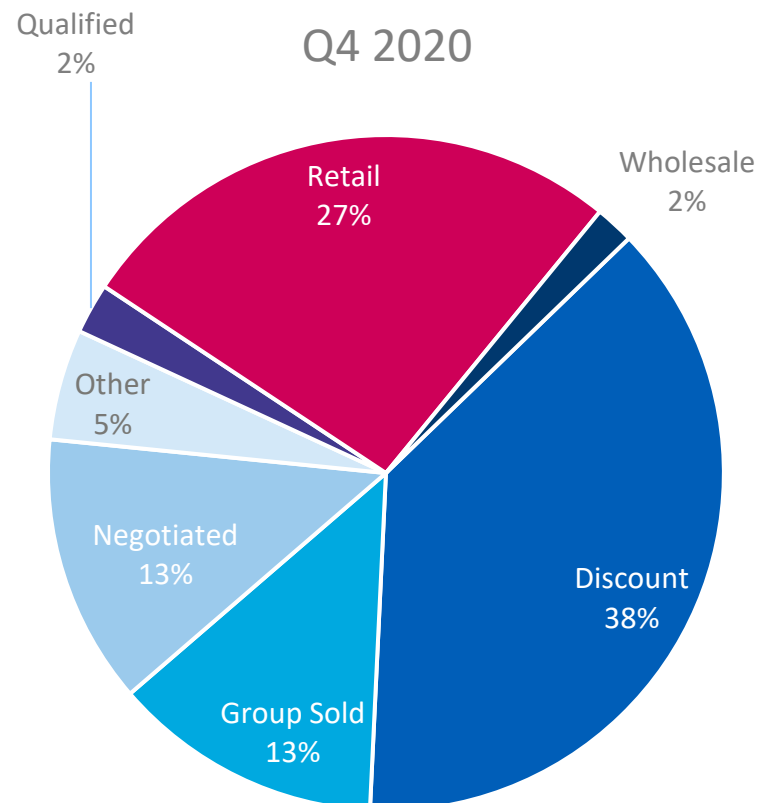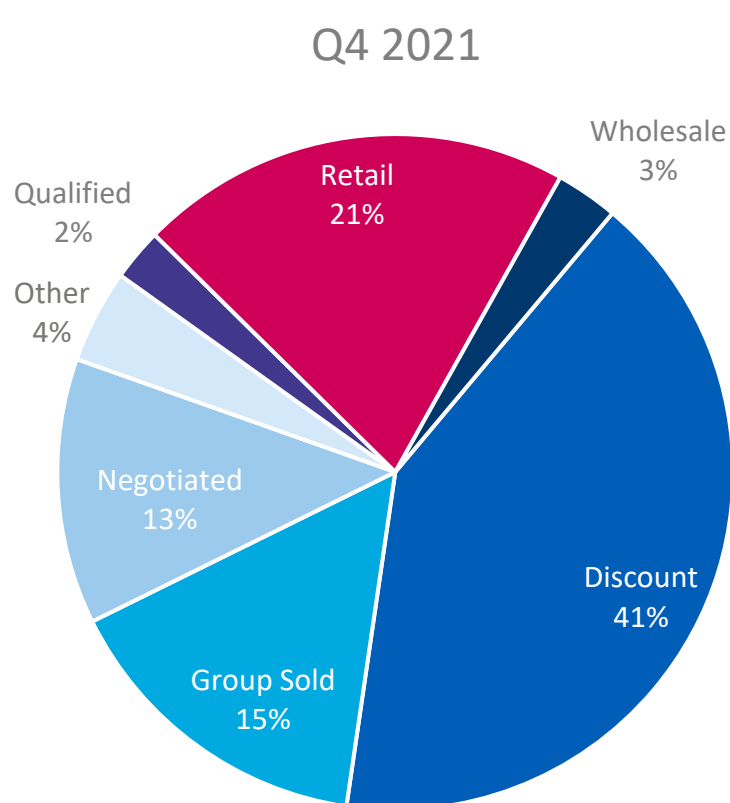
Segmentation – Oktober | Deutschland
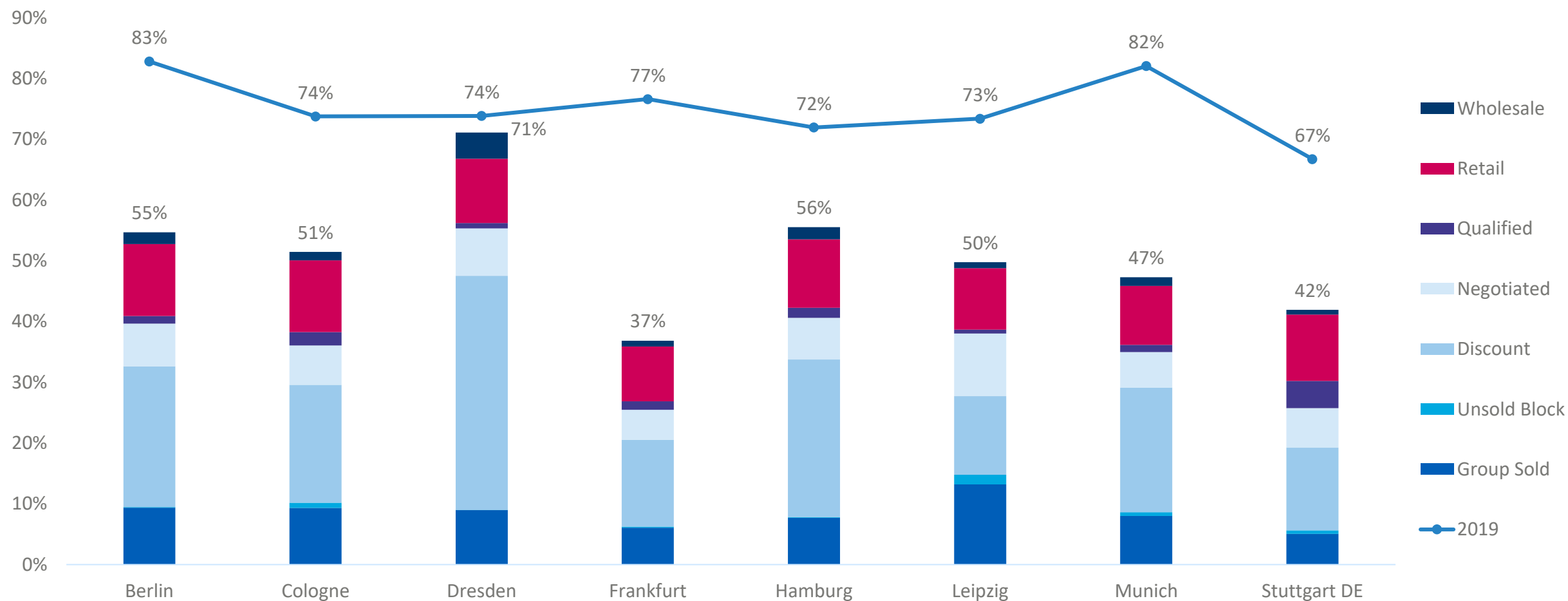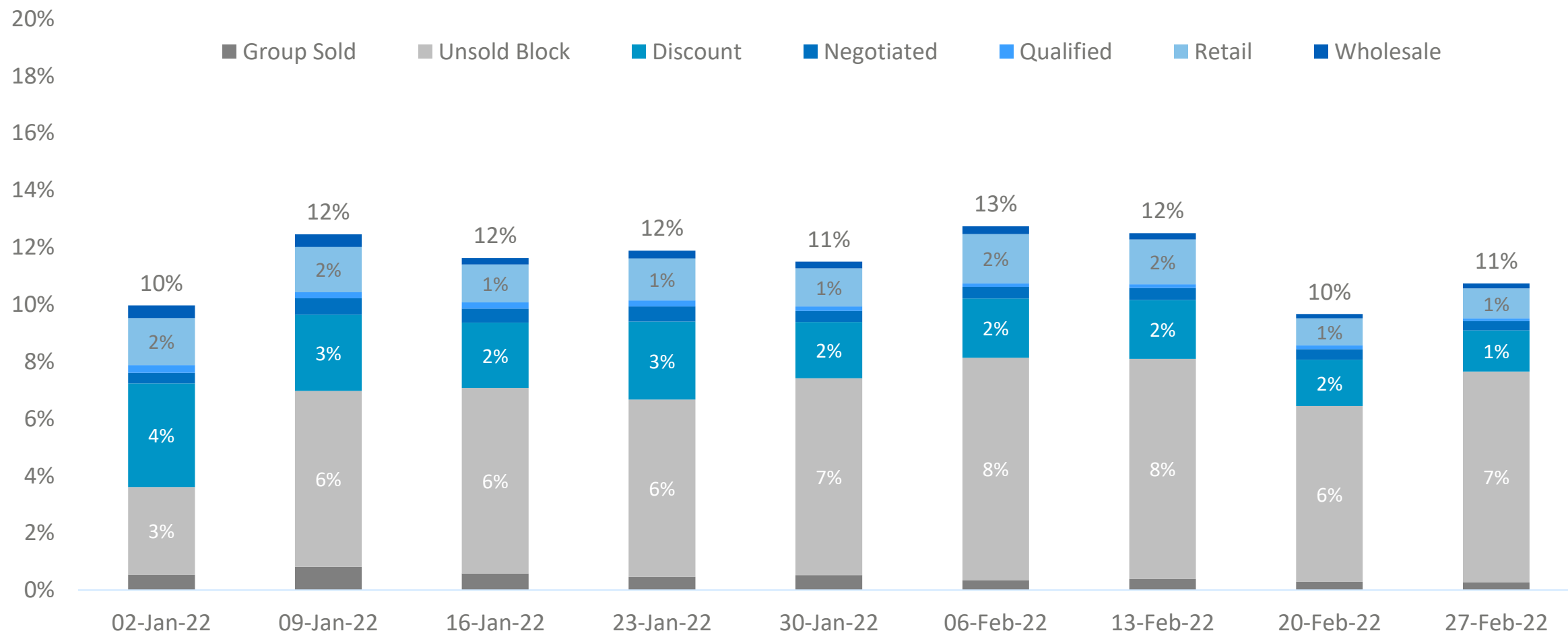
Legend:
- Wholesale
- Retail
- Qualified
- Negotiated
- Discount
- Unsold Block
- Group Sold
- 2019

Berlin: 83% (2019), 55%
Cologne: 74% (2019), 51%
Dresden: 74% (2019), 71%
Frankfurt: 77% (2019), 37%
Hamburg: 72% (2019), 56%
Leipzig: 73% (2019), 50%
Munich: 82% (2019), 47%
Stuttgart DE: 67% (2019), 42%

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GDS Room Nights | Deutschland

Thousands

2019   2020   2021

2019: 116, 80, 109, 122, 118, 107, 118, 121, 66

2021: 50, 56, 45, 62, 57, 39, 34, 27, 15

2020: 19, 17, 13, 13, 13, 12, 12, 13, 9

17-Okt-21 · 24-Okt-21 · 31-Okt-21 · 07-Nov-21 · 14-Nov-21 · 21-Nov-21 · 28-Nov-21 · 05-Dez-21 · 12-Dez-21

Amadeus' Demand360® data as of December 5th

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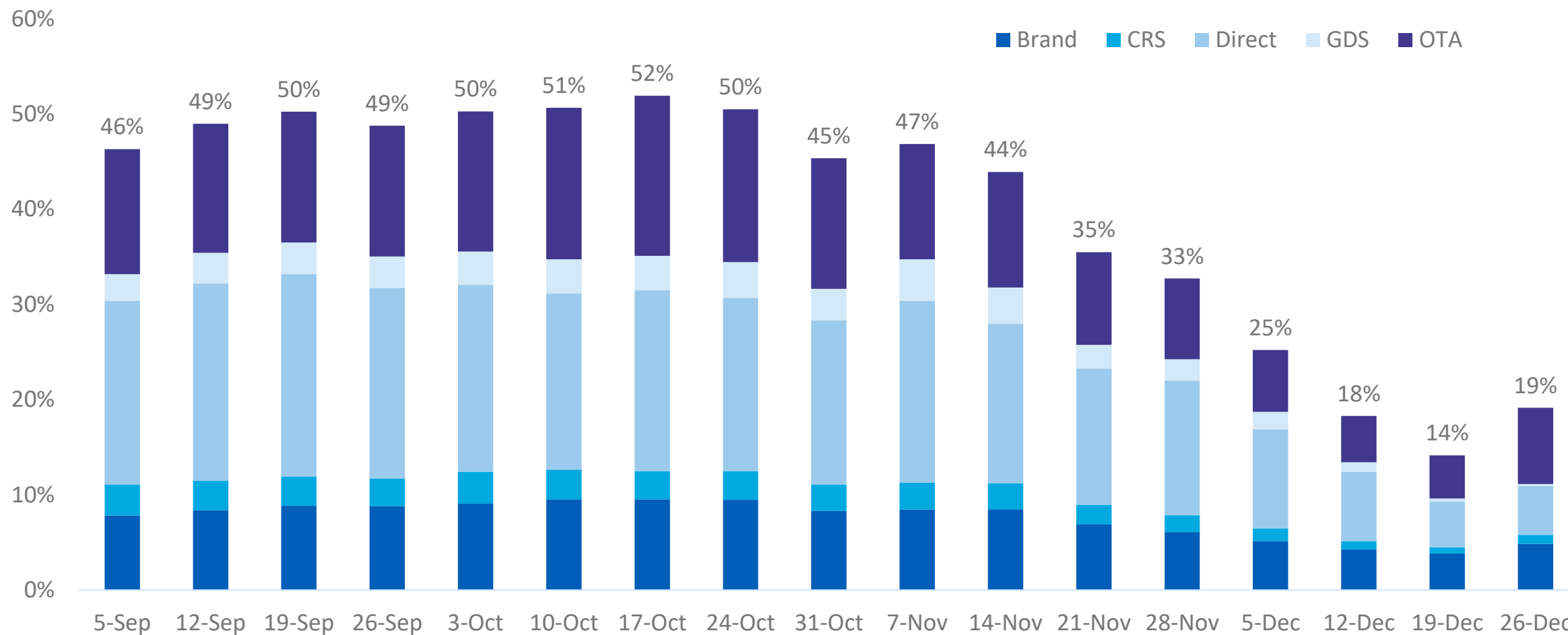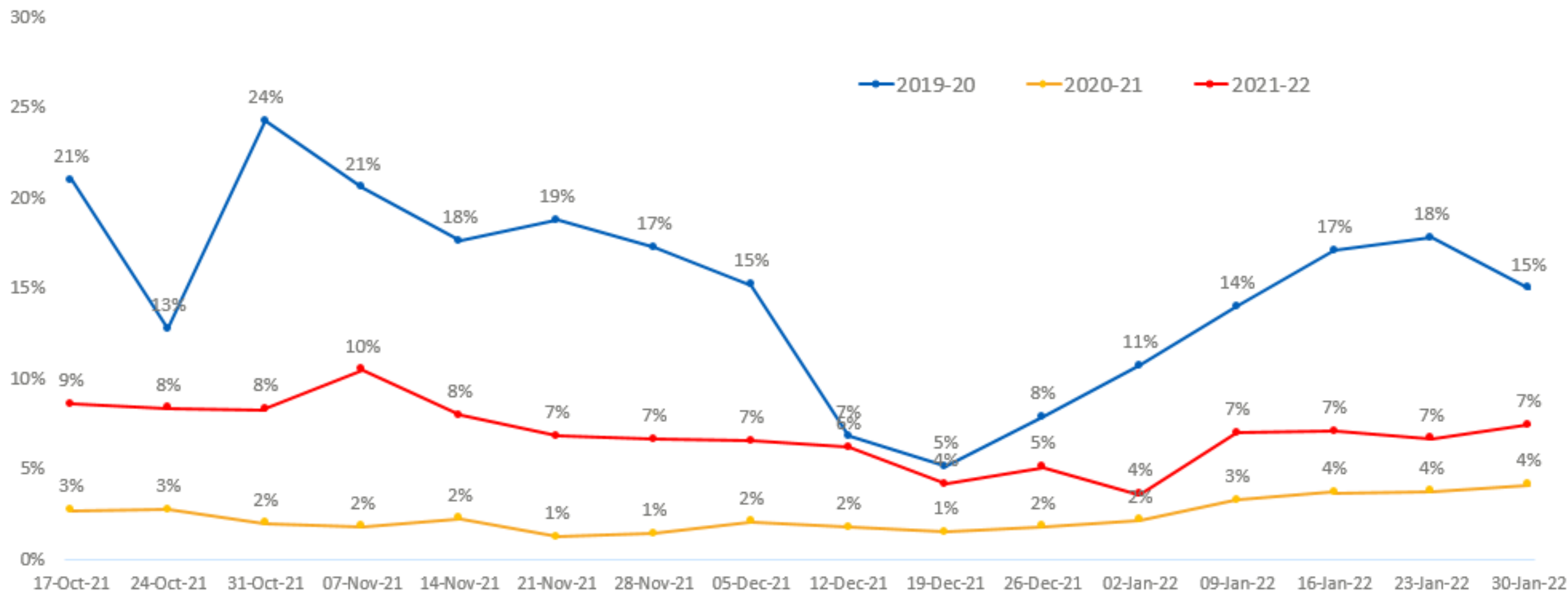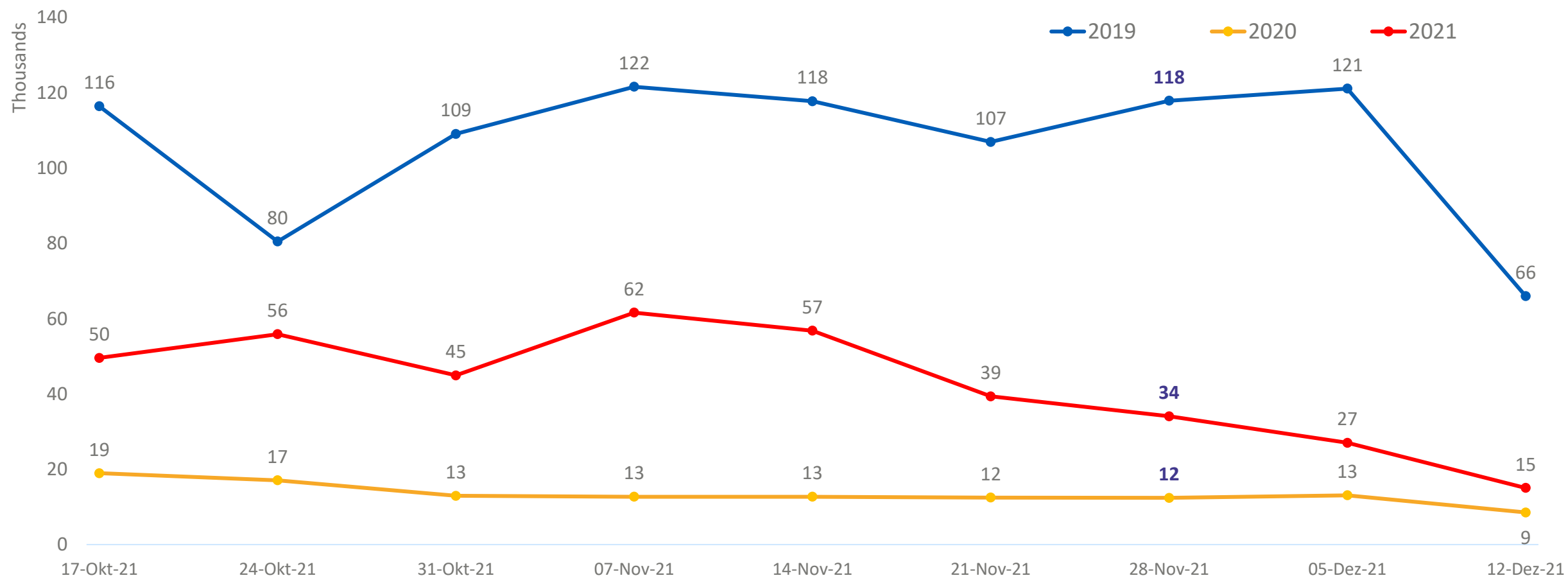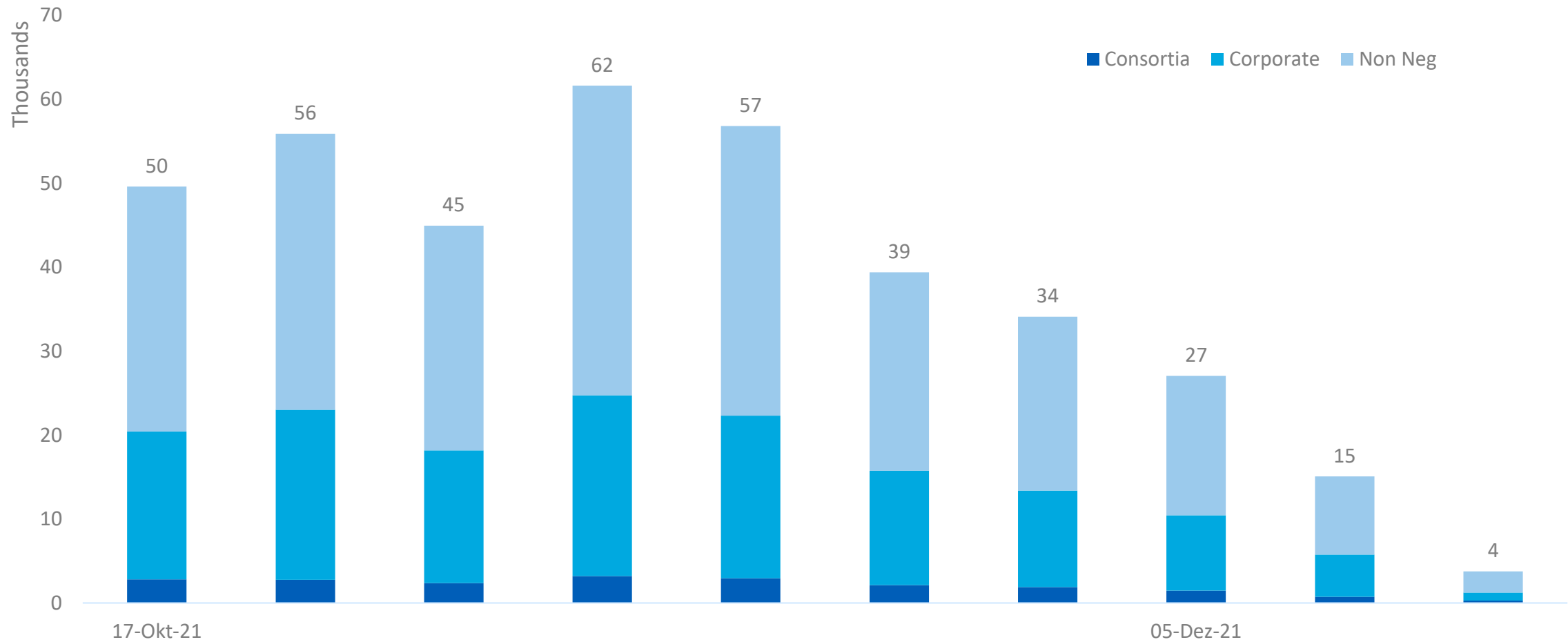
GDS Business Sectors – September & Oktober | Deutschland

GDS Room Nights by Business Sector
Market: Germany
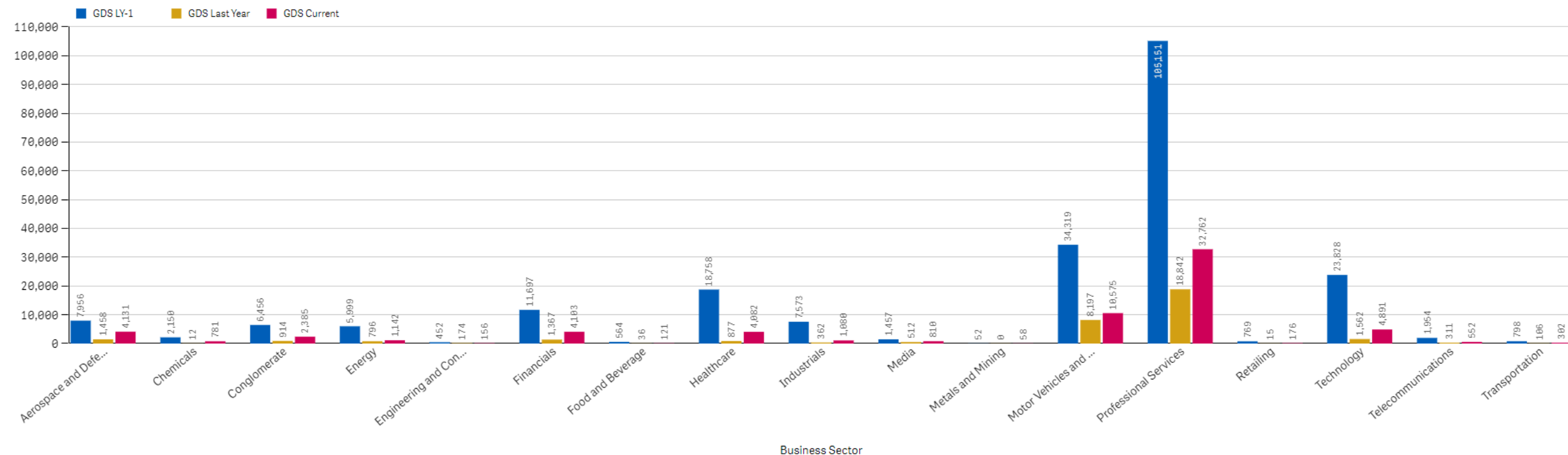
Legend: ■ GDS LY-1 ■ GDS Last Year ■ GDS Current

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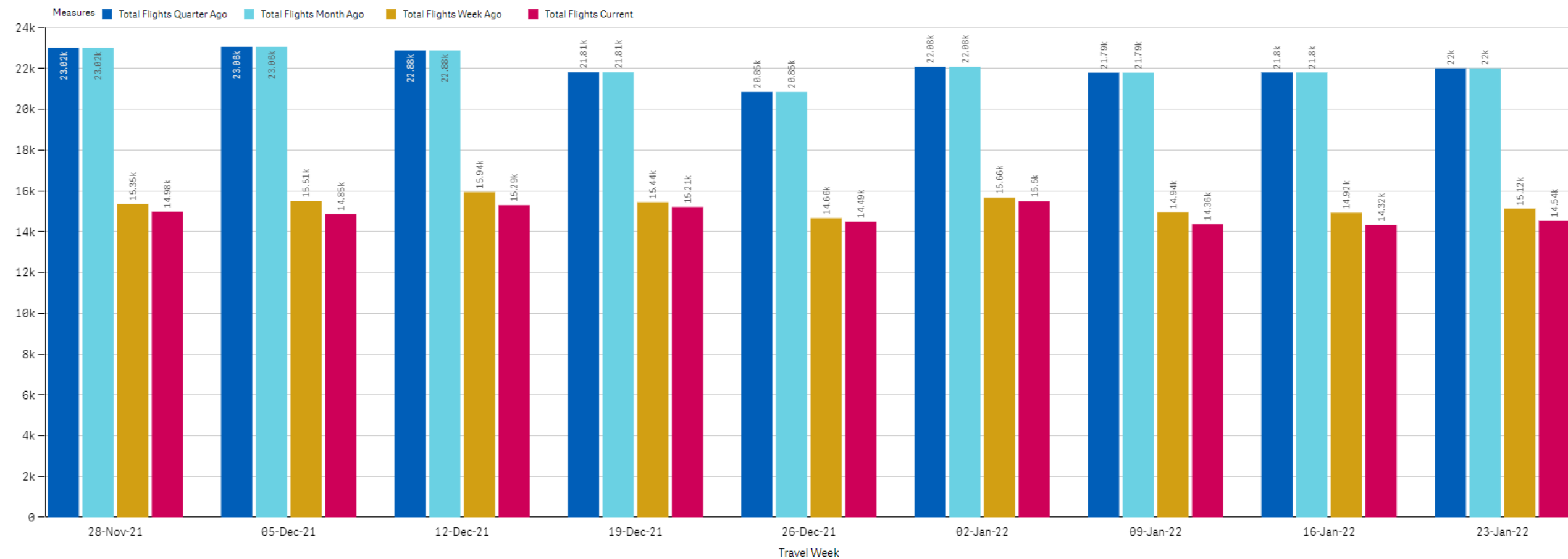
Flights Source markets | Deutschland

Top 10 Origin Country, Current Total Seats for Destination Market Selected

Origin Country

- Germany 31.4%
- Spain 15.9%
- Turkey 9.1%
- Italy 8.9%
- United Kingd... 8.5%
- United Sta... 7.6%
- France 6.8%
- Austria 4.0%
- Portugal 4.0%
- Poland 3.6%
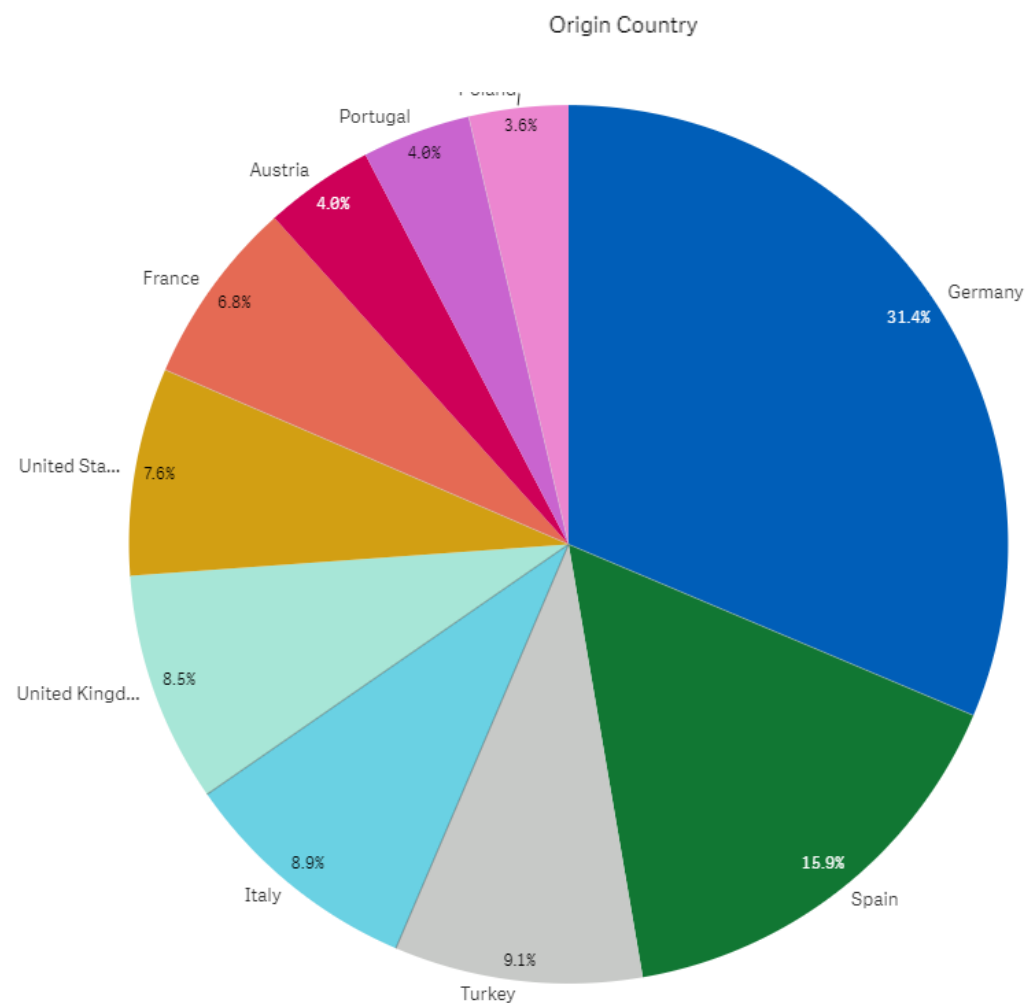
Top 10 Origin Market, Current Total Seats for Destination Market Selected

Origin Market

- Munich 16.8%
- Frankfurt 15.3%
- London 12.6%
- Istanbul 12.1%
- Berlin 8.9%
- Hamburg 7.8%
- Paris 7.5%
- Amsterdam 7.5%
- Vienna 6.1%
- Barcelona ES 5.5%

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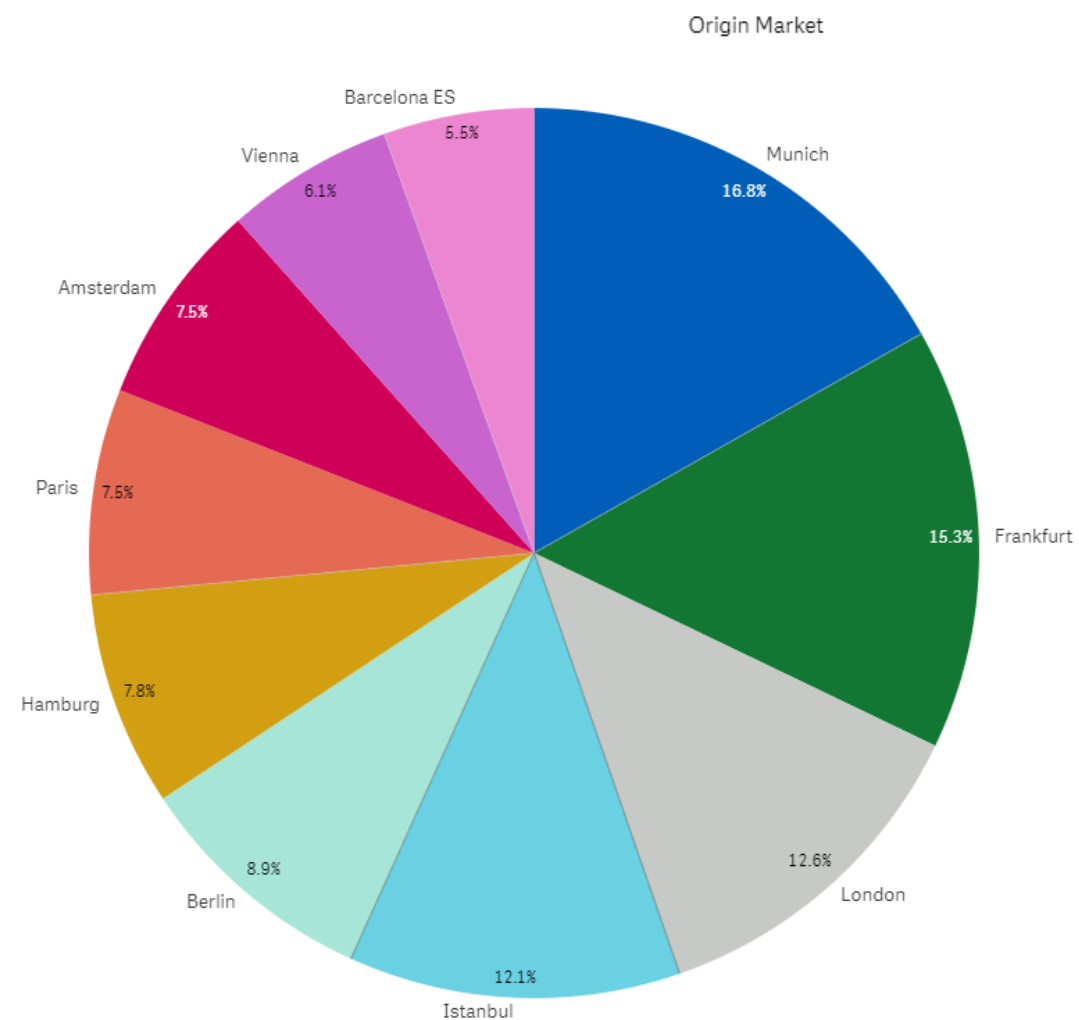
Agenda

02 Google Search Trends

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GERMANY

Demand Explorer: Lookahead Summary (Dec 2021)

Overview

Average Lookahead Window
#days between search and departure dates.

Overall	International	Domestic
39.7	42.2	34.4
-0.4% MoM	-1.1% MoM	1.2% MoM

Average Trip Duration
#days between departure and return dates.

Overall	International	Domestic
6.8	7.9	5.0
2.2% MoM	2% MoM	2% MoM

One-Way Trips
One-way **% of total**; growth calculated on the split.

Overall	International	Domestic
40.2%	43.4%	33.5%
0.7 pp MoM	0.8 pp MoM	0.5 pp MoM

Source: Google Search Trends

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GERMANY

Demand Summary for Germany as a Destination (Dec 2021)

Daily Trend
Destination-based accommodation queries. Indexed to the highest value of the period.

Accom. Demand	International	Domestic
100M	**13%**	**87%**
-26.1% PoP	-14.3% PoP	-27.7% PoP
-3.2% Yo2Y	-27.2% Yo2Y	1.9% Yo2Y

Sun, Sep 26 2021 · Sun, Oct 10 · Sun, Oct 24 · Sun, Nov 7 · Sun, Nov 21 · Sun, Dec 5

— Current Demand — Demand 2 Years Ago — Demand Previous Period

Source: Google Search Trends

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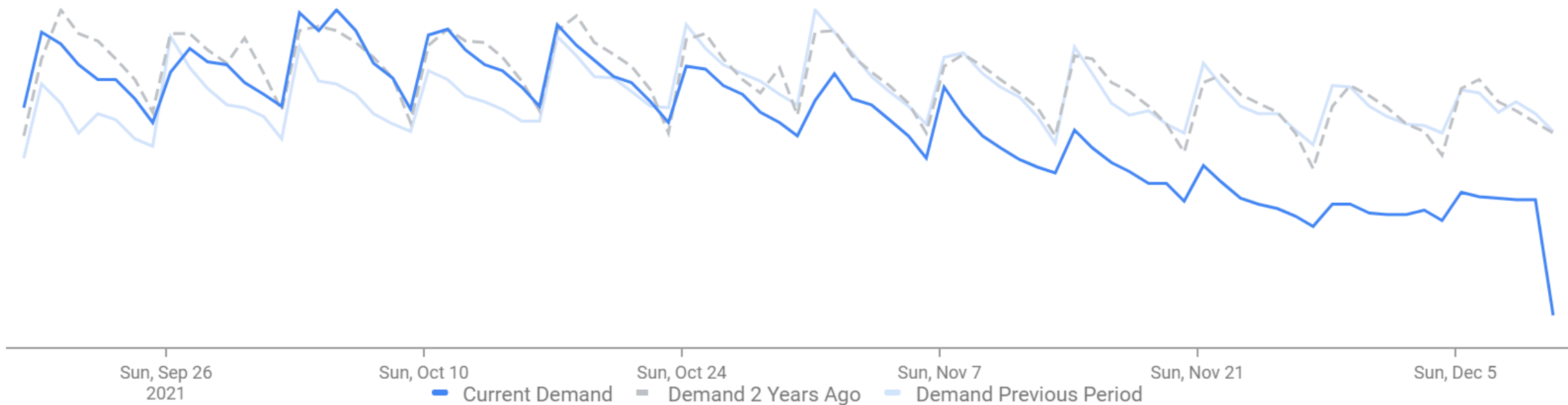
GERMANY

Demand by Accommodation Type (Dec 2021)

Accommodation Types

Demand By Accommodation Type

Destination-based accommodation queries by accommodation type: Hotel, Rentals, B&B, and Hostel. 'Other' is used when the type could not be inferred.
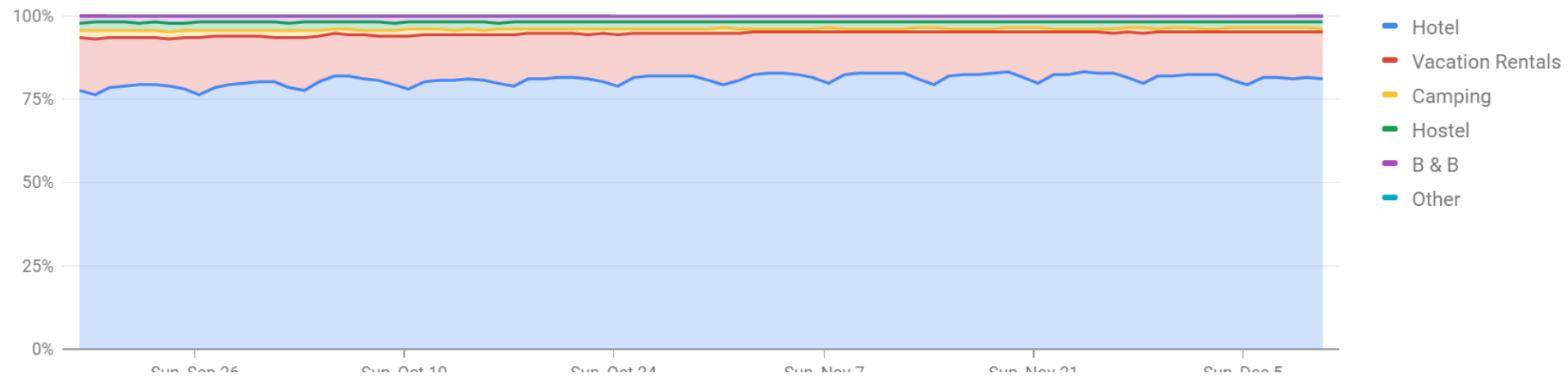
Accommodation Type	Demand Vol.	Percent of Total	Yo2Y	PoP
Hotel	100M	79%	-5%	-20%
Vacation Rentals	20.0M	16%	5%	-42%
Hostel	3.00M	2%	-20%	-20%
B & B	2.00M	2%	-1%	-32%
Camping	2.00M	2%	33%	-72%
Other	1.00K	0%	16%	15%
	100M	100%	-3%	-26%

Certain numbers in this report have been rounded up or down. There may therefore be discrepancies between the actual totals of the individual amounts in the tables and the totals shown. Percentages may not precisely reflect the absolute figures.

Source: Google Search Trends

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GERMANY

Demand by Destination Location (Dec 2021)

Demand by Destination Location

Top 200 location destinations including cities/parks/lakes/etc. (subject to applied filters).

Dest. Location	Demand Vol.	Yo2Y	PoP
+ [DE] Sylt	800K	18%	-40%
+ [DE] Lübeck	800K	14%	-33%
+ [DE] Freiburg im Breisgau	700K	-1%	-17%
+ [DE] Winterberg	700K	-1%	17%
+ [DE] Oberstdorf	700K	1%	-29%
+ [DE] Black Forest	700K	4%	-23%
+ [DE] Münster	700K	1%	-7%
+ [DE] Cuxhaven	600K	30%	-51%
+ [DE] Heidelberg	600K	-7%	-23%
+ [DE] Willingen	600K	17%	2%
+ [DE] Norderney	600K	7%	-43%
+ [DE] Bonn	600K	-13%	0%
+ [DE] Garmisch-Partenkirchen	600K	11%	-31%

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GERMANY
Demand by Origin Country (Dec 2021)

Demand by User Country

Top 50 user countries (subject to applied filters).

User Country	Demand Vol.	Yo2Y	PoP
+ [DE] Germany	100M	2%	-28%
+ [NL] Netherlands	3.00M	-17%	-36%
+ [CH] Switzerland	2.00M	-24%	-10%
+ [AT] Austria	2.00M	-23%	-27%
+ [FR] France	1.00M	-15%	-6%
+ [GB] United Kingdom	1.00M	-46%	33%
+ [US] United States	1.00M	-45%	-1%
+ [BE] Belgium	900K	-19%	-25%
+ [IT] Italy	900K	-33%	-22%
+ [DK] Denmark	900K	-1%	-29%
+ [ES] Spain	700K	-27%	24%
+ [PL] Poland	500K	-11%	-30%
+ [RU] Russia	300K	89%	52%
+ [SE] Sweden	300K	-22%	-22%

Source: Google Search Trends

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BERLIN

Demand Explorer: Lookahead Summary (Dec 2021)

Overview

Average Lookahead Window
#days between search and departure dates.

Overall	International	Domestic
40.1	**43.8**	**30.4**
-0.7% MoM	-1% MoM	-0.3% MoM

Average Trip Duration
#days between departure and return dates.

Overall	International	Domestic
5.9	**6.6**	**4.3**
2% MoM	2.1% MoM	1.4% MoM

One-Way Trips
One-way **% of total**; growth calculated on the split.

Overall	International	Domestic
36.1%	**38.2%**	**30.6%**
0.5 pp MoM	0.6 pp MoM	0.3 pp MoM

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BERLIN

Demand Summary for Berlin as a Destination (Dec 2021)
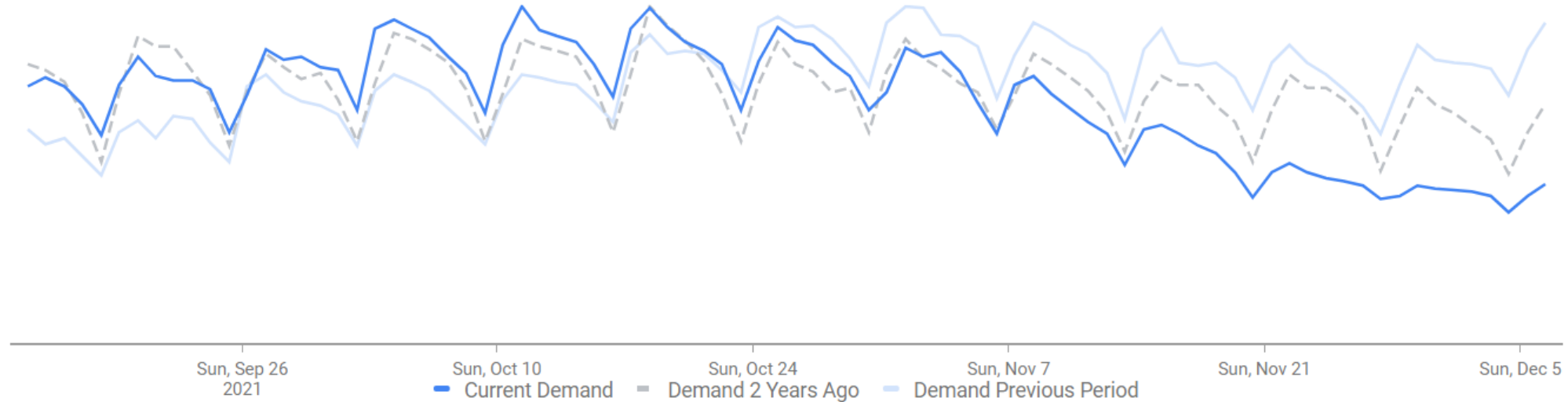
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BERLIN

Demand by Region-Location (Dec 2021)

Demand by Region-Location Directionality

Top 200 Region-location directionalities (subject to applied filters).

User Region	Destination Location	Domestic / Int'l	Demand Vol.	Yo2Y	PoP
[DE] Berlin	[DE] Berlin	Domestic	2.00M	-17%	9%
[DE] North Rhine-Westphalia	[DE] Berlin	Domestic	1.00M	-7%	1%
[DE] Bavaria	[DE] Berlin	Domestic	600K	-16%	-10%
[DE] Lower Saxony	[DE] Berlin	Domestic	600K	-10%	-3%
[DE] Baden-Württemberg	[DE] Berlin	Domestic	500K	-12%	-7%
[DE] Hessen	[DE] Berlin	Domestic	400K	-11%	4%
[DE] Hamburg	[DE] Berlin	Domestic	300K	5%	8%
[GB] England	[DE] Berlin	International	300K	-42%	98%
[DE] Saxony	[DE] Berlin	Domestic	300K	-13%	-7%
[DE] Brandenburg	[DE] Berlin	Domestic	300K	-9%	3%
[DE] Schleswig-Holstein	[DE] Berlin	Domestic	200K	-7%	-2%
[DE] Rhineland-Palatinate	[DE] Berlin	Domestic	200K	-11%	-9%
[DE] Saxony-Anhalt	[DE] Berlin	Domestic	100K	-18%	-6%
[DE] Mecklenburg-Vorpommern	[DE] Berlin	Domestic	100K	-18%	-7%
[DE] Thuringia	[DE] Berlin	Domestic	100K	-16%	-14%
[RU] Moscow	[DE] Berlin	International	90.0K	312%	69%

Source: Google Search Trends

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BERLIN

Google Search Trends for Flights To Berlin(Dec 2021)

Queries by City-City Route

Top 2000 city-city routes (subject to applied filters).

Route			Last 84 Days		Last 28 Days			Last 7 Days		
Origin	Destination	Route ID	Queries	Yo2Y	Queries	MoM	Yo2Y	Queries	WoW	Yo2Y
GB - London	DE - Berlin	LON-BER	100K	-37%	30.0K	-32%	-45%	4.00K	-23%	-62%
DE - Frankfurt	DE - Berlin	FRA-BER	90.0K	-33%	20.0K	-32%	-44%	5.00K	-4%	-49%
FR - Paris	DE - Berlin	PAR-BER	80.0K	-11%	20.0K	-38%	-31%	4.00K	-7%	-44%
IL - Tel Aviv-Yafo	DE - Berlin	TLV-BER	70.0K	-6%	10.0K	-51%	-42%	2.00K	-27%	-68%
DE - Munich	DE - Berlin	MUC-BER	70.0K	-38%	20.0K	-33%	-48%	4.00K	0%	-50%
DE - Stuttgart	DE - Berlin	STR-BER	60.0K	-35%	10.0K	-38%	-50%	3.00K	8%	-53%
DE - Düsseldorf	DE - Berlin	DUS-BER	60.0K	-32%	10.0K	-39%	-49%	3.00K	-6%	-56%
DE - Cologne	DE - Berlin	CGN-BER	60.0K	-37%	10.0K	-38%	-51%	3.00K	3%	-54%
ES - Madrid	DE - Berlin	MAD-BER	50.0K	-17%	10.0K	-39%	-36%	2.00K	-14%	-51%
NL - Amsterdam	DE - Berlin	AMS-BER	50.0K	-24%	10.0K	-39%	-41%	2.00K	-6%	-50%
AT - Vienna	DE - Berlin	VIE-BER	50.0K	-19%	10.0K	-40%	-38%	3.00K	3%	-38%
CH - Zürich	DE - Berlin	ZRH-BER	50.0K	-21%	10.0K	-38%	-38%	2.00K	-13%	-53%
IT - Milan	DE - Berlin	MIL-BER	40.0K	-20%	10.0K	-37%	-37%	2.00K	-13%	-47%

MUNICH

Demand Explorer: Lookahead Summary (Dec 2021)

Overview

Average Lookahead Window
#days between search and departure dates.

Overall	International	Domestic
42.8	47.9	32.1
-1.5% MoM	-2.1% MoM	-0.6% MoM

Average Trip Duration
#days between departure and return dates.

Overall	International	Domestic
6.8	7.9	4.8
1.8% MoM	1.6% MoM	1.5% MoM

One-Way Trips
One-way **% of total**; growth calculated on the split.

Overall	International	Domestic
37.9%	40.3%	32.7%
0.8 pp MoM	0.9 pp MoM	0.3 pp MoM

Source: Google Search Trends

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MUNICH

Demand Summary for Munich as a Destination (Dec 2021)
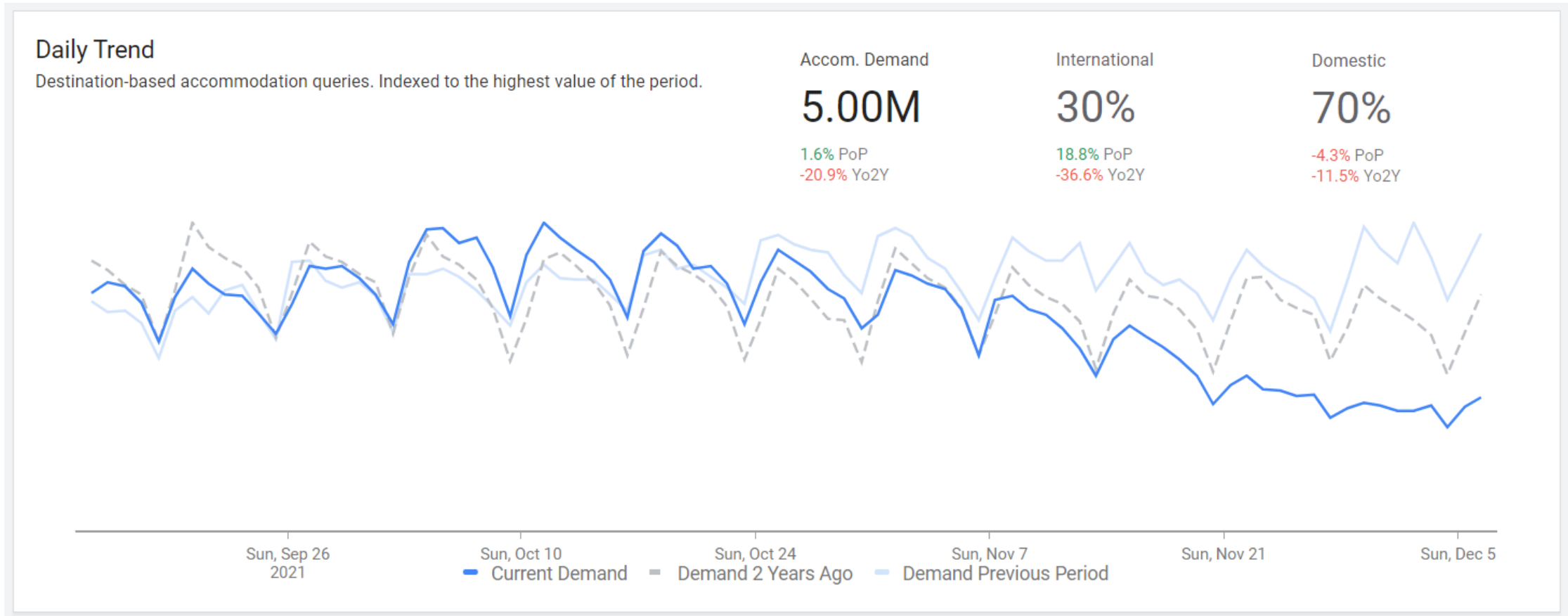
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MUNICH

Demand by Region-Location (Dec 2021)

Demand by Region-Location Directionality

Top 200 Region-location directionalities (subject to applied filters).

User Region	Destination Location	Domestic / Int'l	Demand Vol.	Yo2Y	PoP
[DE] Bavaria	[DE] Munich	Domestic	1.00M	-17%	1%
[DE] Baden-Württemberg	[DE] Munich	Domestic	500K	-7%	-6%
[DE] North Rhine-Westphalia	[DE] Munich	Domestic	400K	-5%	-10%
[DE] Hessen	[DE] Munich	Domestic	200K	-8%	-4%
[DE] Lower Saxony	[DE] Munich	Domestic	100K	-6%	-18%
[DE] Rhineland-Palatinate	[DE] Munich	Domestic	100K	-2%	-13%
[DE] Berlin	[DE] Munich	Domestic	100K	-10%	6%
[RU] Moscow	[DE] Munich	International	90.0K	479%	78%
[GB] England	[DE] Munich	International	80.0K	-50%	65%
[DE] Hamburg	[DE] Munich	Domestic	70.0K	1%	6%
[DE] Saxony	[DE] Munich	Domestic	60.0K	-8%	-12%
[CH] Zurich	[DE] Munich	International	50.0K	-21%	30%
[AT] Vienna	[DE] Munich	International	50.0K	-21%	25%
[DE] Schleswig-Holstein	[DE] Munich	Domestic	40.0K	5%	-12%
[DE] Thuringia	[DE] Munich	Domestic	30.0K	-19%	-11%
[DE] Brandenburg	[DE] Munich	Domestic	30.0K	0%	-11%

Source: Google Search Trends

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MUNICH

Google Search Trends for Flights To Munich (Dec 2021)

Queries by City-City Route

Top 2000 city-city routes (subject to applied filters).

Route			Last 84 Days		Last 28 Days			Last 7 Days		
Origin	**Destination**	**Route ID**	**Queries**	**Yo2Y**	**Queries**	**MoM**	**Yo2Y**	**Queries**	**WoW**	**Yo2Y**
DE - Hamburg	DE - Munich	HAM-MUC	70.0K	-24%	20.0K	-38%	-41%	3.00K	-1%	-48%
GB - London	DE - Munich	LON-MUC	60.0K	-43%	10.0K	-33%	-51%	2.00K	-18%	-66%
DE - Berlin	DE - Munich	BER-MUC	50.0K	-41%	10.0K	-31%	-49%	3.00K	-3%	-54%
DE - Düsseldorf	DE - Munich	DUS-MUC	50.0K	-38%	10.0K	-39%	-51%	2.00K	-2%	-56%
DE - Frankfurt	DE - Munich	FRA-MUC	50.0K	-28%	10.0K	-27%	-35%	3.00K	-4%	-43%
ES - Madrid	DE - Munich	MAD-MUC	30.0K	-11%	8.00K	-41%	-29%	1.00K	-10%	-44%
DE - Memmingen	DE - Munich	FMM-MUC	30.0K	-10%	7.00K	-35%	-26%	2.00K	1%	-29%
DE - Nuremberg	DE - Munich	NUE-MUC	30.0K	-22%	8.00K	-28%	-29%	2.00K	7%	-31%
FR - Paris	DE - Munich	PAR-MUC	30.0K	-24%	7.00K	-39%	-47%	1.00K	-5%	-64%
DE - Cologne	DE - Munich	CGN-MUC	30.0K	-42%	7.00K	-36%	-54%	1.00K	-1%	-58%
NL - Amsterdam	DE - Munich	AMS-MUC	20.0K	-31%	5.00K	-41%	-45%	1.00K	-2%	-51%
DE - Stuttgart	DE - Munich	STR-MUC	20.0K	-24%	6.00K	-29%	-33%	1.00K	-5%	-41%
ES - Barcelona	DE - Munich	BCN-MUC	20.0K	-17%	5.00K	-40%	-30%	1.00K	-13%	-44%

Source: Google Search Trends

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Frankfurt

Demand Explorer: Lookahead Summary (Dec 2021)

Overview

Average Lookahead Window
#days between search and departure dates.

Overall	International	Domestic
40.5	**42.5**	**32.7**
-1.1% MoM	-1.5% MoM	0.5% MoM

Average Trip Duration
#days between departure and return dates.

Overall	International	Domestic
9.0	**10.1**	**5.5**
1.4% MoM	1.2% MoM	1.5% MoM

One-Way Trips
One-way **% of total**; growth calculated on the split.

Overall	International	Domestic
43.0%	**44.6%**	**36.8%**
0.7 pp MoM	0.7 pp MoM	0.5 pp MoM

Source: Google Search Trends

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Frankfurt

Demand Summary for Frankfurt as a Destination (Dec 2021)

Daily Trend
Destination-based accommodation queries. Indexed to the highest value of the period.

Accom. Demand	International	Domestic
3.00M	**26%**	**74%**
20.9% PoP	30.9% PoP	17.7% PoP
-22.1% Yo2Y	-35.9% Yo2Y	-15.7% Yo2Y

Sun, Sep 26 2021 — Sun, Oct 10 — Sun, Oct 24 — Sun, Nov 7 — Sun, Nov 21 — Sun, Dec 5

— Current Demand   ▬ Demand 2 Years Ago   ▬ Demand Previous Period

Source: Google Search Trends

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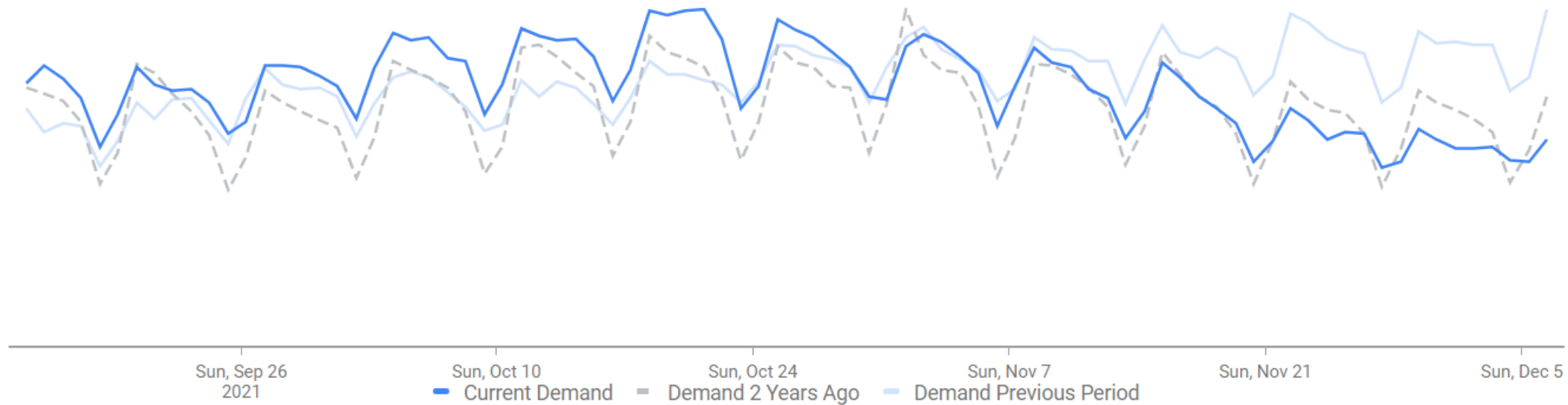
Frankfurt

Demand by Region-Location (Dec 2021)

Demand by Region-Location Directionality

Top 200 Region-location directionalities (subject to applied filters).

User Region	Destination Location	Domestic / Int'l	Demand Vol.	Yo2Y	PoP
[DE] Hessen	[DE] Frankfurt	Domestic	800K	-19%	20%
[DE] North Rhine-Westphalia	[DE] Frankfurt	Domestic	300K	-12%	18%
[DE] Baden-Württemberg	[DE] Frankfurt	Domestic	300K	-11%	13%
[DE] Bavaria	[DE] Frankfurt	Domestic	200K	-13%	13%
[DE] Rhineland-Palatinate	[DE] Frankfurt	Domestic	100K	-8%	17%
[DE] Lower Saxony	[DE] Frankfurt	Domestic	90.0K	-15%	16%
[DE] Berlin	[DE] Frankfurt	Domestic	70.0K	-16%	39%
[GB] England	[DE] Frankfurt	International	50.0K	-42%	65%
[DE] Hamburg	[DE] Frankfurt	Domestic	50.0K	-13%	31%
[DE] Saxony	[DE] Frankfurt	Domestic	30.0K	-17%	24%
[DE] Thuringia	[DE] Frankfurt	Domestic	30.0K	-20%	28%
[DE] Saarland	[DE] Frankfurt	Domestic	30.0K	-21%	17%
[DE] Schleswig-Holstein	[DE] Frankfurt	Domestic	20.0K	-18%	7%
[CH] Zurich	[DE] Frankfurt	International	20.0K	-22%	34%
[FR] Île-de-France	[DE] Frankfurt	International	20.0K	-30%	51%
[RU] Moscow	[DE] Frankfurt	International	20.0K	222%	67%

Source: Google Search Trends

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Frankfurt

Google Search Trends for Flights To Frankfurt (Dec 2021)

Queries by City-City Route

Top 2000 city-city routes (subject to applied filters).

Route			Last 84 Days		Last 28 Days			Last 7 Days		
Origin	Destination	Route ID	Queries	Yo2Y	Queries	MoM	Yo2Y	Queries	WoW	Yo2Y
GB - London	DE - Frankfurt	LON-FRA	60.0K	-39%	20.0K	-23%	-42%	3.00K	-19%	-57%
DE - Berlin	DE - Frankfurt	BER-FRA	60.0K	-31%	20.0K	-23%	-36%	4.00K	-6%	-43%
DE - Munich	DE - Frankfurt	MUC-FRA	40.0K	-26%	10.0K	-26%	-29%	3.00K	-3%	-35%
DE - Düsseldorf	DE - Frankfurt	DUS-FRA	40.0K	-21%	10.0K	-22%	-18%	3.00K	-5%	-21%
DE - Stuttgart	DE - Frankfurt	STR-FRA	40.0K	-20%	10.0K	-21%	-22%	3.00K	5%	-21%
DE - Hamburg	DE - Frankfurt	HAM-FRA	40.0K	-28%	10.0K	-26%	-34%	2.00K	-7%	-42%
DE - Cologne	DE - Frankfurt	CGN-FRA	30.0K	-20%	10.0K	-24%	-20%	2.00K	-4%	-23%
ES - Madrid	DE - Frankfurt	MAD-FRA	30.0K	-11%	8.00K	-32%	-21%	2.00K	4%	-25%
IN - New Delhi	DE - Frankfurt	DEL-FRA	30.0K	47%	10.0K	12%	70%	2.00K	-7%	69%
AT - Vienna	DE - Frankfurt	VIE-FRA	30.0K	-32%	7.00K	-26%	-41%	2.00K	2%	-45%
ES - Barcelona	DE - Frankfurt	BCN-FRA	20.0K	-2%	6.00K	-33%	-7%	1.00K	-8%	-13%
AE - Dubai	DE - Frankfurt	DXB-FRA	20.0K	9%	8.00K	-13%	5%	2.00K	-9%	4%
US - New York	DE - Frankfurt	NYC-FRA	20.0K	-34%	8.00K	13%	-26%	2.00K	5%	-33%

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Hamburg

Demand Explorer: Lookahead Summary (Dec 2021)

Overview

Average Lookahead Window
#days between search and departure dates.

Overall	International	Domestic
36.8	**39.1**	**33.7**
0% MoM	-0.7% MoM	0.8% MoM

Average Trip Duration
#days between departure and return dates.

Overall	International	Domestic
5.7	**6.9**	**4.5**
3.1% MoM	3.4% MoM	1.8% MoM

One-Way Trips
One-way **% of total**; growth calculated on the split.

Overall	International	Domestic
36.6%	**42.9%**	**27.8%**
0.9 pp MoM	0.8 pp MoM	0.7 pp MoM

Source: Google Search Trends

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Hamburg

Demand Summary for Hamburg as a Destination (Dec 2021)

Daily Trend
Destination-based accommodation queries. Indexed to the highest value of the period.

Accom. Demand	International	Domestic
6.00M	**14%**	**86%**
-0.7% PoP	5.5% PoP	-1.6% PoP
-9.7% Yo2Y	-25.1% Yo2Y	-6.7% Yo2Y

Sun, Sep 26 2021 — Sun, Oct 10 — Sun, Oct 24 — Sun, Nov 7 — Sun, Nov 21 — Sun, Dec 5

— Current Demand   ═ Demand 2 Years Ago   — Demand Previous Period
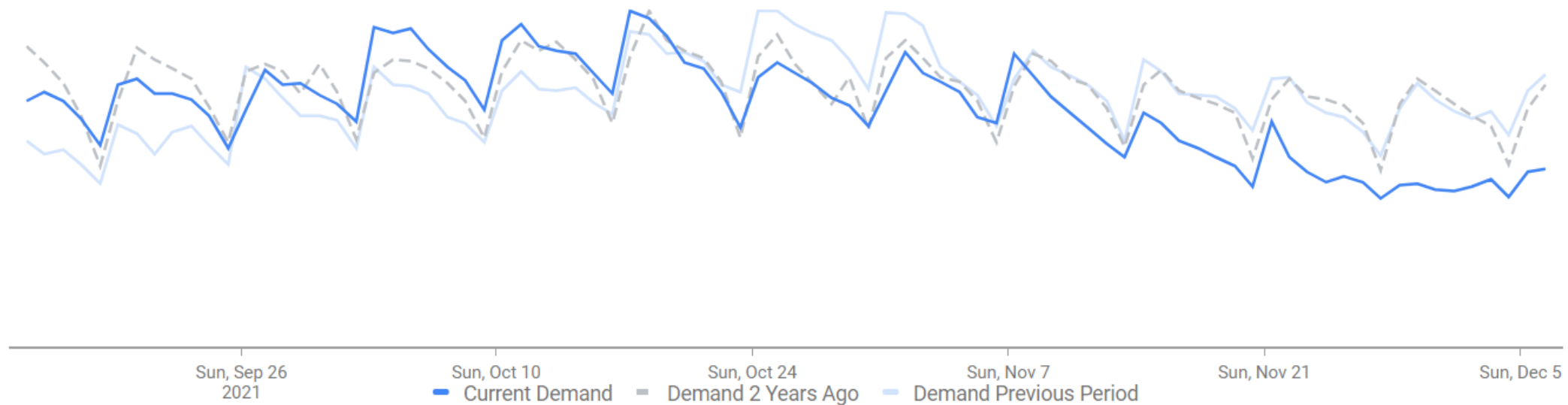
Source: Google Search Trends

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Hamburg

Demand by Region-Location (Dec 2021)

Demand by Region-Location Directionality

Top 200 Region-location directionalities (subject to applied filters).

User Region	Destination Location	Domestic / Int'l	Demand Vol.	Yo2Y	PoP
[DE] North Rhine-Westphalia	[DE] Hamburg	Domestic	1.00M	1%	0%
[DE] Hamburg	[DE] Hamburg	Domestic	1.00M	-10%	6%
[DE] Lower Saxony	[DE] Hamburg	Domestic	800K	-7%	0%
[DE] Bavaria	[DE] Hamburg	Domestic	400K	-12%	-12%
[DE] Schleswig-Holstein	[DE] Hamburg	Domestic	400K	-4%	6%
[DE] Baden-Württemberg	[DE] Hamburg	Domestic	300K	-12%	-15%
[DE] Hessen	[DE] Hamburg	Domestic	300K	-6%	-5%
[DE] Berlin	[DE] Hamburg	Domestic	200K	-1%	8%
[DE] Rhineland-Palatinate	[DE] Hamburg	Domestic	100K	-4%	-10%
[DE] Saxony	[DE] Hamburg	Domestic	100K	-15%	-11%
[DE] Mecklenburg-Vorpommern	[DE] Hamburg	Domestic	90.0K	-12%	-1%
[DE] Brandenburg	[DE] Hamburg	Domestic	90.0K	2%	4%
[DE] Saxony-Anhalt	[DE] Hamburg	Domestic	70.0K	-13%	-2%
[DK] Capital Region of Denmark	[DE] Hamburg	International	60.0K	22%	8%
[DE] Bremen	[DE] Hamburg	Domestic	60.0K	-11%	6%
[DE] Thuringia	[DE] Hamburg	Domestic	60.0K	-11%	-9%

Source: Google Search Trends

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Hamburg
Google Search Trends for Flights To Hamburg (Dec 2021)

Queries by City-City Route

Top 2000 city-city routes (subject to applied filters).

Route			Last 84 Days		Last 28 Days			Last 7 Days		
Origin	Destination	Route ID	Queries	Yo2Y	Queries	MoM	Yo2Y	Queries	WoW	Yo2Y
DE - Munich	DE - Hamburg	MUC-HAM	70.0K	-27%	20.0K	-34%	-38%	4.00K	-3%	-42%
DE - Stuttgart	DE - Hamburg	STR-HAM	50.0K	-37%	10.0K	-36%	-48%	2.00K	2%	-54%
DE - Frankfurt	DE - Hamburg	FRA-HAM	40.0K	-33%	10.0K	-25%	-39%	2.00K	-8%	-47%
CH - Zürich	DE - Hamburg	ZRH-HAM	30.0K	-18%	8.00K	-37%	-33%	1.00K	-21%	-52%
AT - Vienna	DE - Hamburg	VIE-HAM	30.0K	-30%	7.00K	-38%	-45%	2.00K	6%	-45%
GB - London	DE - Hamburg	LON-HAM	30.0K	-44%	8.00K	-26%	-49%	2.00K	-11%	-61%
DE - Düsseldorf	DE - Hamburg	DUS-HAM	30.0K	-29%	6.00K	-31%	-39%	1.00K	-3%	-43%
DE - Cologne	DE - Hamburg	CGN-HAM	20.0K	-34%	5.00K	-32%	-44%	1.00K	-12%	-53%
DE - Bremen	DE - Hamburg	BRE-HAM	20.0K	-16%	5.00K	-32%	-25%	1.00K	-10%	-36%
FR - Paris	DE - Hamburg	PAR-HAM	20.0K	-9%	5.00K	-29%	-21%	1.00K	-5%	-29%
DE - Nuremberg	DE - Hamburg	NUE-HAM	20.0K	-32%	4.00K	-37%	-46%	900	-7%	-54%
DE - Hanover	DE - Hamburg	HAJ-HAM	20.0K	-4%	4.00K	-34%	-15%	900	2%	-13%
ES - Palma	DE - Hamburg	PMI-HAM	10.0K	2%	2.00K	-56%	-11%	400	4%	-28%

Source: Google Search Trends

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Agenda

03 Takeaways for the Hospitality Industry

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Take Aways for 2021 are still the same

Domestic Market

Capture increasing demand from guests within driving distance who are traveling but do not want to fly (or can't fly).

Direct channels

Guests want to know more about the destination and hygiene standards. Driving demand to your direct channels.
.

Leisure first

Emphasize on the leisure market ready to travel.
No one is expecting business travel to begin recovering until late this year.

Digitalization & Tech Infrastructure

Your tech ecosystem must allow you to service your customers' expectations and the market trends. Use IA powered systems to target customers and the right time with the right offer and content.

Flexibility

Promote relaxed cancellation fees, rate guarantees, and rebooking policies. A must to get guests to book.

Flexcation/Workation

Cater for a new traveler segment looking for hotels with work-friendly private space and business amenities with in-destination pleasures.

Personalized Experience

Know your guests and preferences. Drive targeted communications to them based on what you know.

ADR

Don't sacrifice your ADR.
Include/offer expected ancillary services in the package

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Thank You

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