



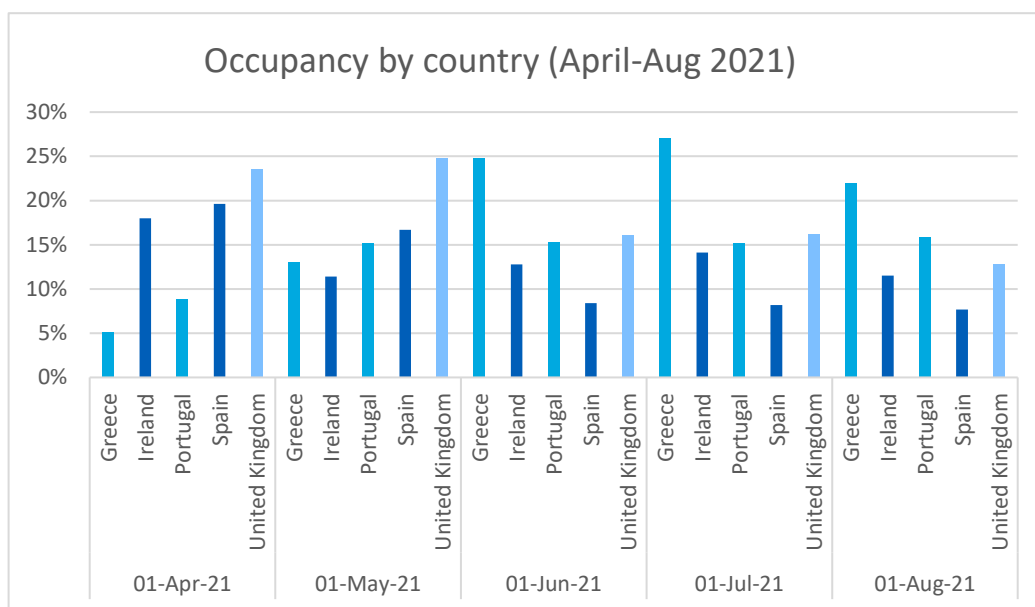
Amadeus Data Insights – May

With 12 countries on the green list... are Brits staying at home or away?

The long-awaited list of countries that made the green list is finally available, but as of May, only 12 destinations made the cut. Even with the potential introduction of the EU passport, the question remains – where are those in the UK & Ireland looking to travel this summer? We use Amadeus Demand360® forward-looking, on-the-books hotel and flight data to find out.

When comparing the UK and Ireland to other key European markets - including Portugal, the only typical summer hotspot on the UK’s green list currently – UK occupancy is higher for the months of April, May and June. Greece and Portugal both increase then as we look further into the Summer months. Remember that this data is not predictive but represents real-time reservations.

Higher occupancy in the UK between April and July

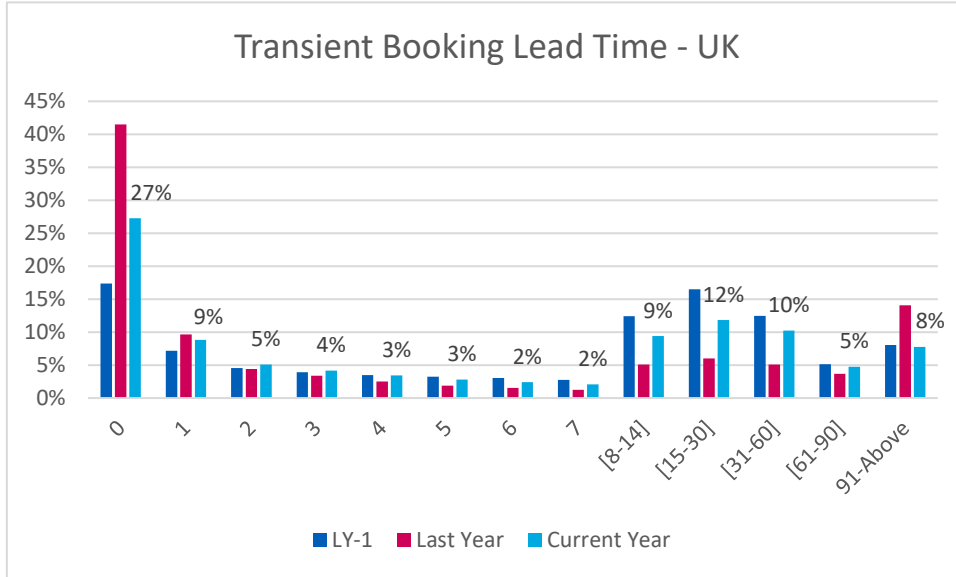


Amadeus’ Demand360® data, as of 9 May 2021

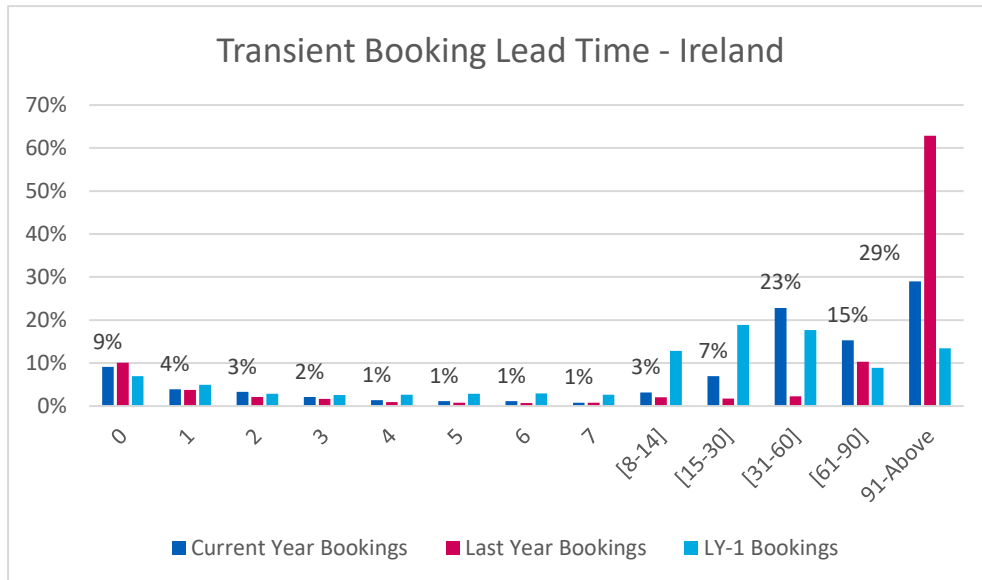
However, one of the major trends that emerged out of the pandemic is a reduction in lead times. In the U.K., this is still an important indicator for demand. Currently, 56% of bookings are made within the one-week window, of which 27% are made on the day of arrival. Whilst this number is down from 2020, it’s still a notable change than when comparing with 2019.



As for Ireland, travellers are taking a more cautious approach, with 67% of bookings made 31+ days in advance.



Amadeus' Demand360® data, as of 9 May 2021



Amadeus' Demand360® data, as of 16 May 2021

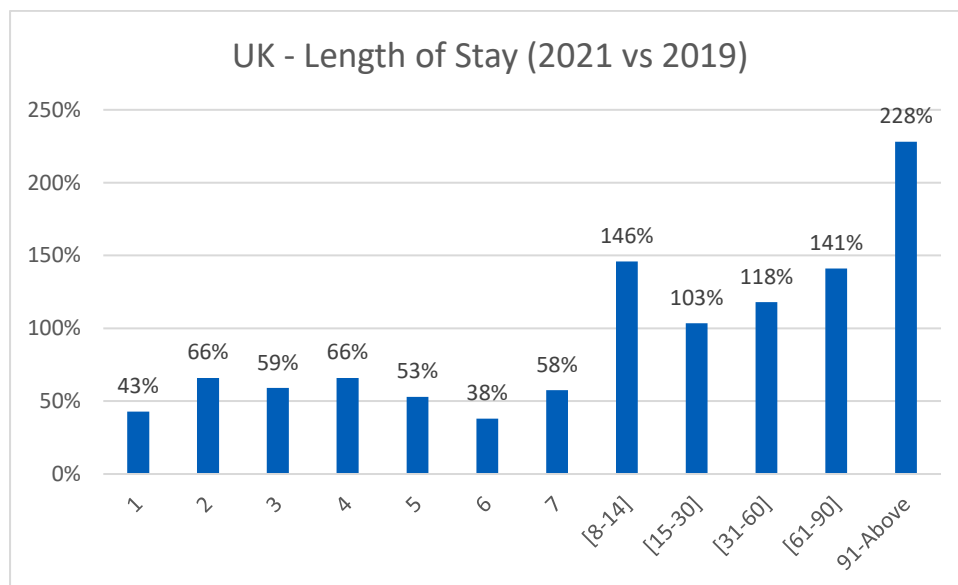


Another important factor to consider is the cancellation ratio - the rate at which hotel bookings are cancelled. For the UK, this number is sitting around 20% for the months of April and May. This is lower than the 40% average seen even before the pandemic ([Phocuswire](#)). This is good news for hoteliers as it suggests that, whilst travellers might be waiting longer to book, when they are booking, they are doing so with more certainty.

Stronger signs of recovery in leisure destinations as anticipated by hoteliers

The increase in occupancy in line with the reopening of hotels is a positive sign for hoteliers across the U.K. But which destinations are driving demand? In our latest [Rebuilding Hospitality report](#), hoteliers believe that leisure will be the primary driver of recovery. Current bookings align with this expectation. For example, throughout May, seaside destinations are leading the way with highs of 40-50% occupancy in Blackpool and Bournemouth. As we look further out, Plymouth is showing strong signs of demand with occupancy reaching 60% for July and August. Similarly, in Ireland, occupancy in Galway is above 50% throughout these months. In comparison, for London, occupancy is lower the further out we look. However, that’s not to say the demand isn’t there. When drilling down on lead time, 21% of bookings in London are currently made either the day before or day of arrival. If you have properties in this area, think about how to encourage stays by combining them with value-add activities such as restaurant discounts.

Finally, our newest indicator now provides insight into length of stay. Where the number appears as higher than 100% in the graph, this shows an increase compared with the previous time period. For the UK, this means that, compared with 2019, stays are lengthening overall. With alternative accommodations coming back strong, it’s important to think about how you can capture this market. Discounts on longer stays, remote office concepts or complimentary breakfast are examples of what could help your property stand out from the competition.



Amadeus’ Demand360® data, as of 16 May 2021



Understanding and applying data will be a key asset for hotels that want to effectively capture market share and stand out from the competition. For this reason, we have launched [Amadeus Demand Generation](#). Combining insight from five solutions, hoteliers have the power to make informed decisions that can increase bookings in your direct channel.