



Wiener Tourismusverband Webinar

Zahlen, Daten, Fakten und Prognosen mit STR

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1.

**STR
Vorstellung**

2.

**Entwicklung auf
Internationaler
Ebene**

3.

Deep Dive Wien

4.

Ausblick

The world's largest hotel performance sample



over
35 years
of expertise



Data from
180 countries



73,000
Hotels



9.6 million
Rooms

Unser Angebot



Performance Reports

Occ, ADR, RevPAR
Supply/Demand
Revenue
P&L



Research Studies

Event Impact
Regional
Performance Reviews
Whitepapers
Ad Hoc studies



Supply Reports

Existing supply
Future supply
Pipeline
Characteristics



Analysis

Compression
Day of Week
Event Impact
Bespoke client reporting



Forecast Reports

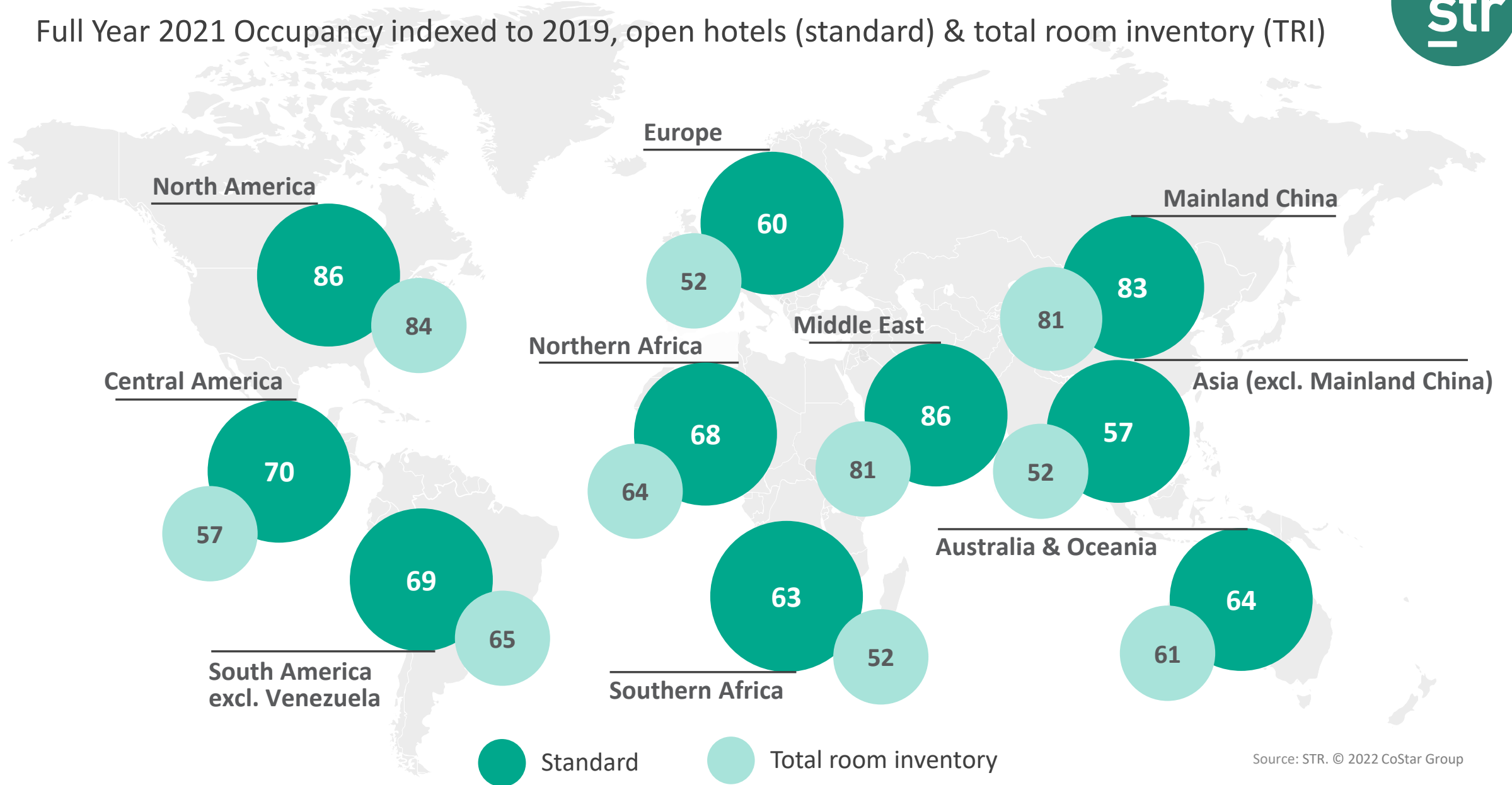
Main KPIs
5 years/6 quarters/
18 months
Macro economic input
Micro economic input



Entwicklung auf Internationaler Ebene

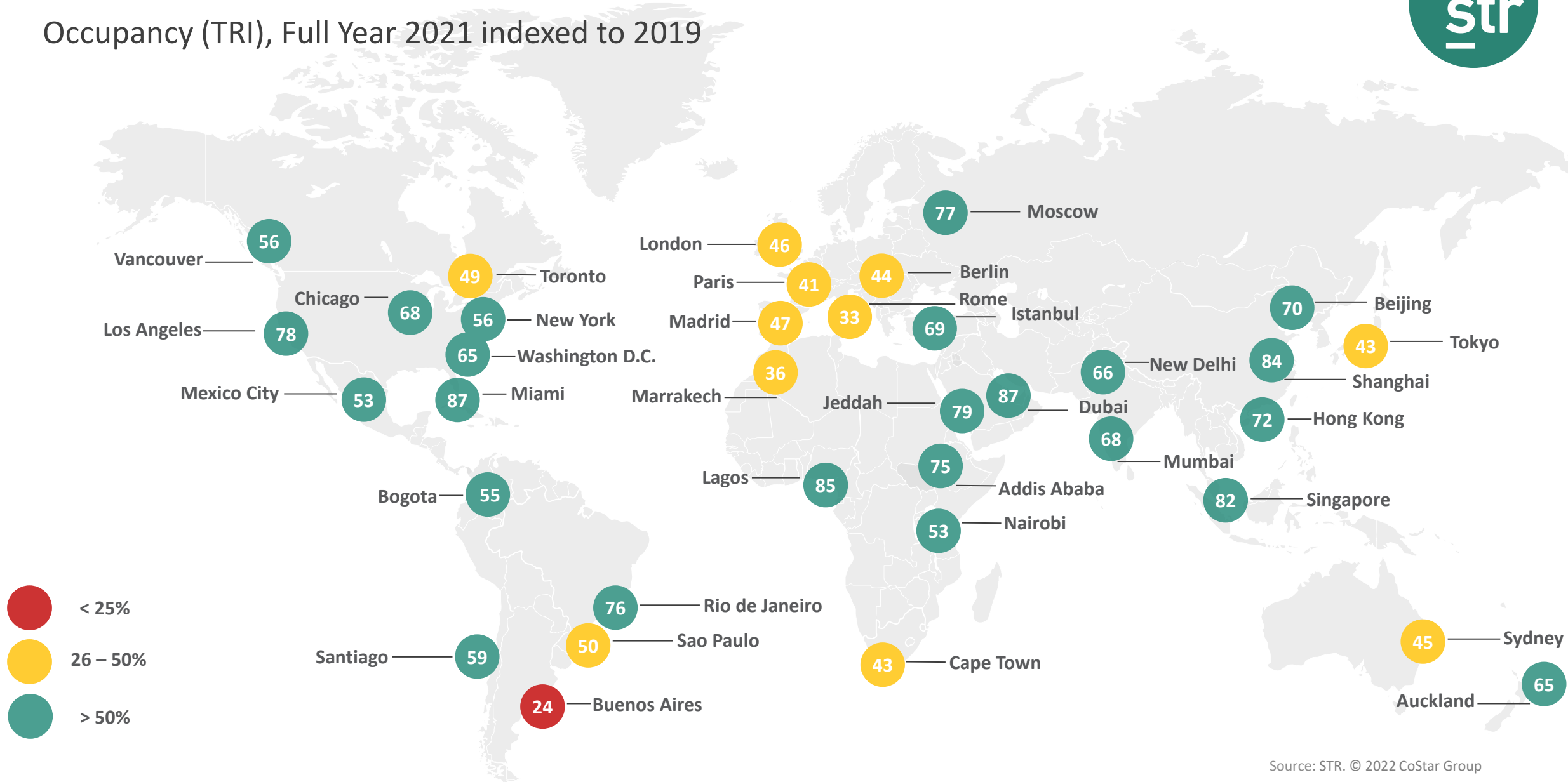
Im Vergleich zu 2019 konnte sich keine Region komplett erholen

Full Year 2021 Occupancy indexed to 2019, open hotels (standard) & total room inventory (TRI)



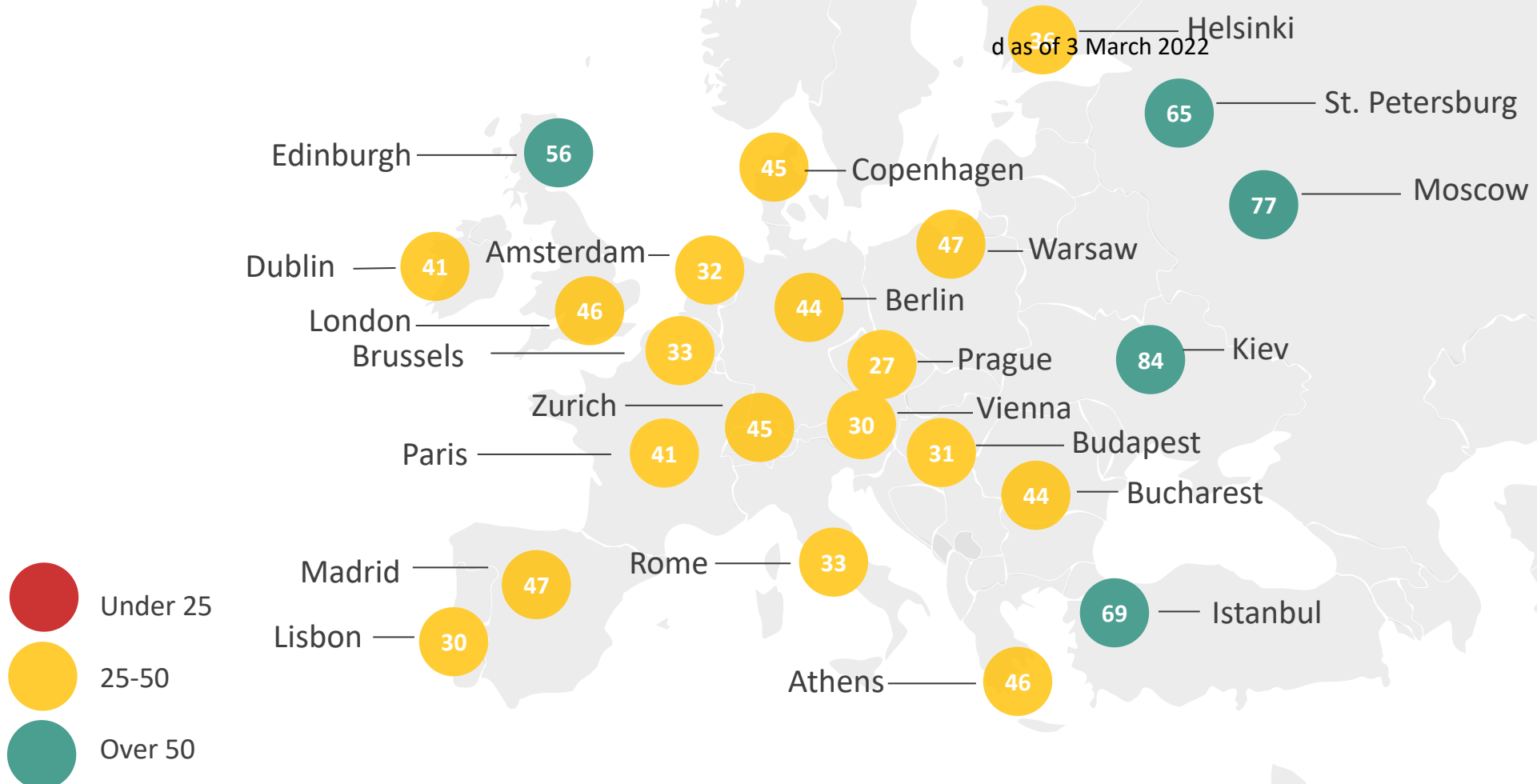
Gruen, die Farbe der Hoffnung ...

Occupancy (TRI), Full Year 2021 indexed to 2019



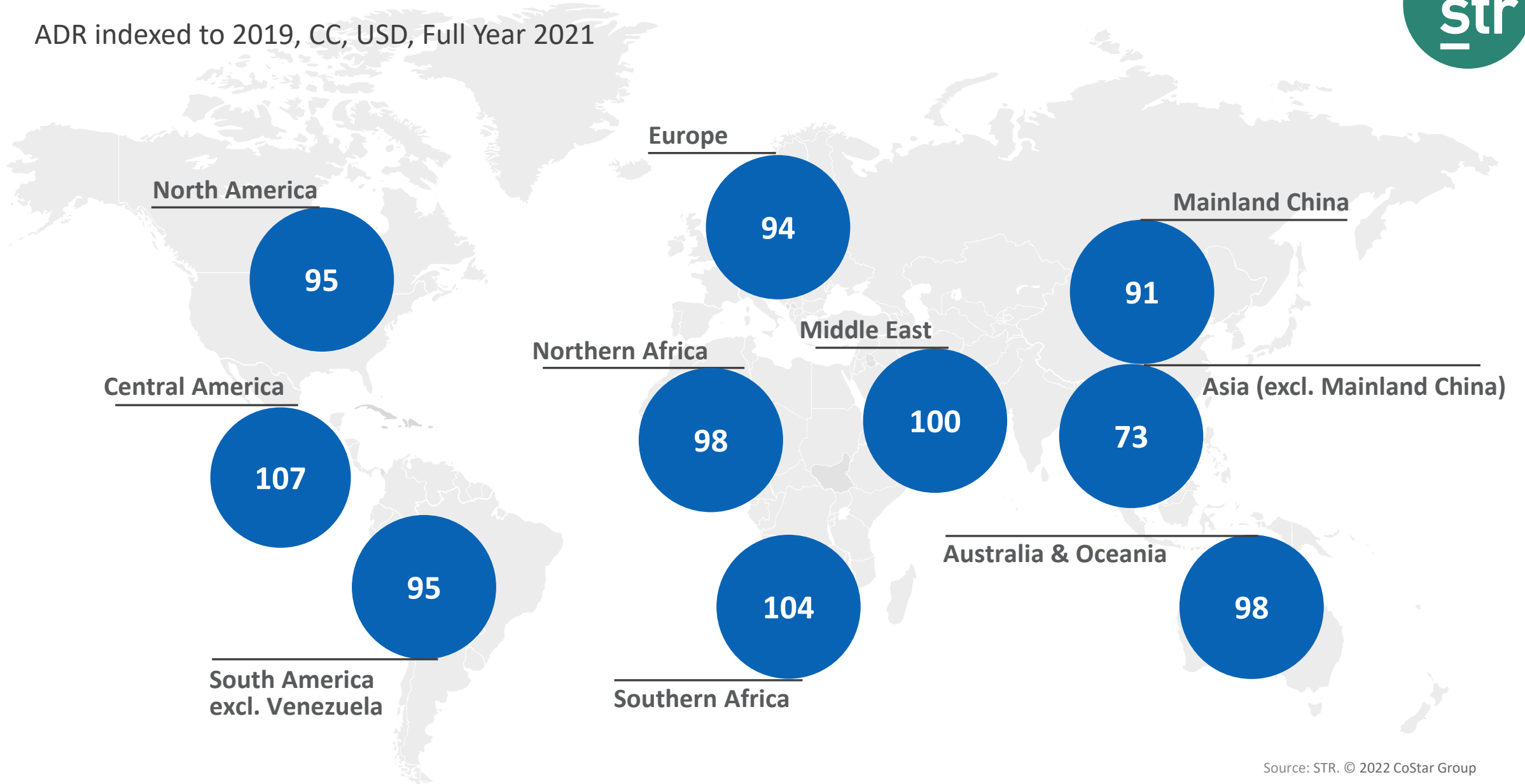
Edinburgh und Istanbul in Fuehrung

European major markets, Occupancy (TRI), Full Year 2021 indexed to 2019



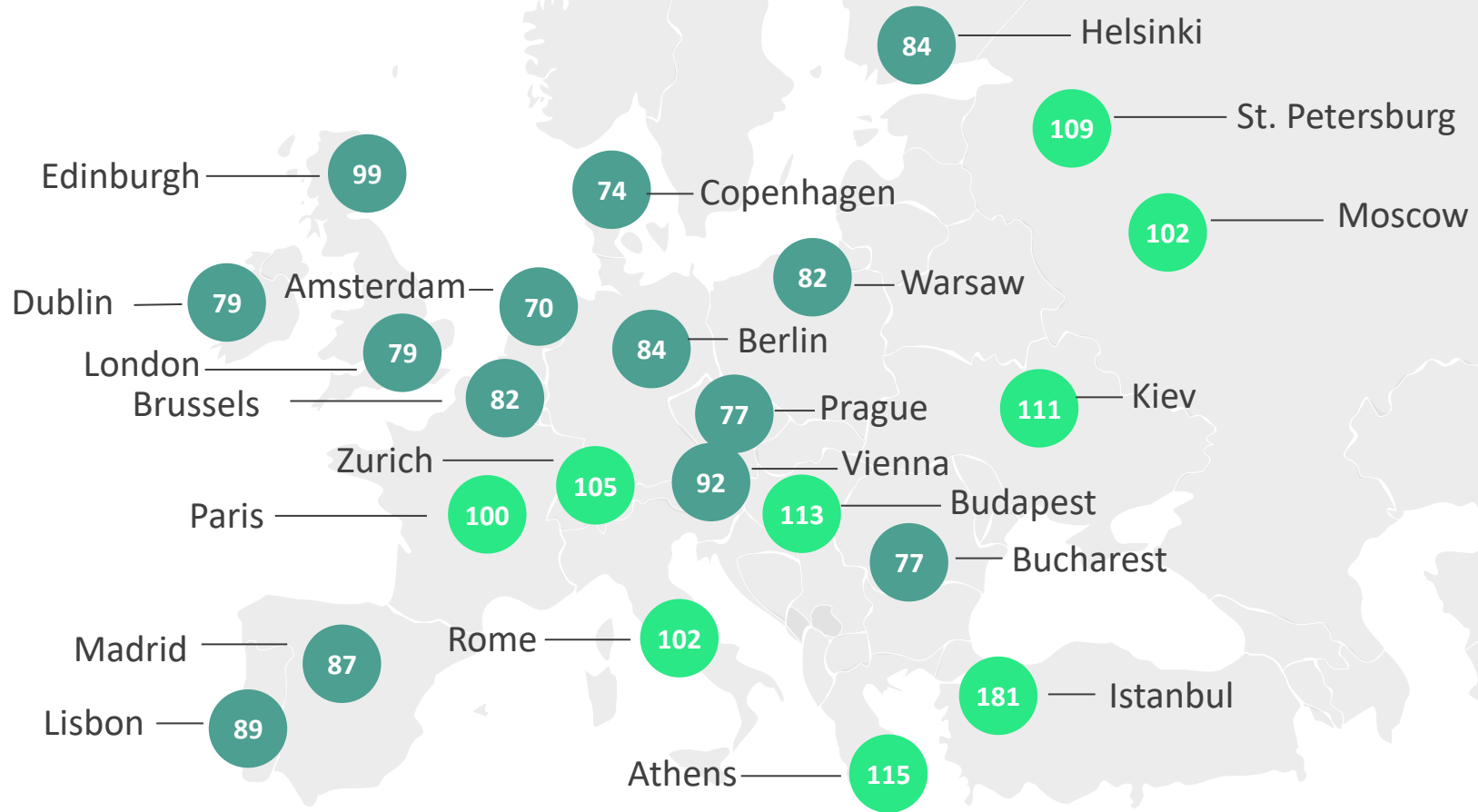
ADR ist deutlich stabiler

ADR indexed to 2019, CC, USD, Full Year 2021



Durchschnittsrate stabil, unabhangig von Auslastung

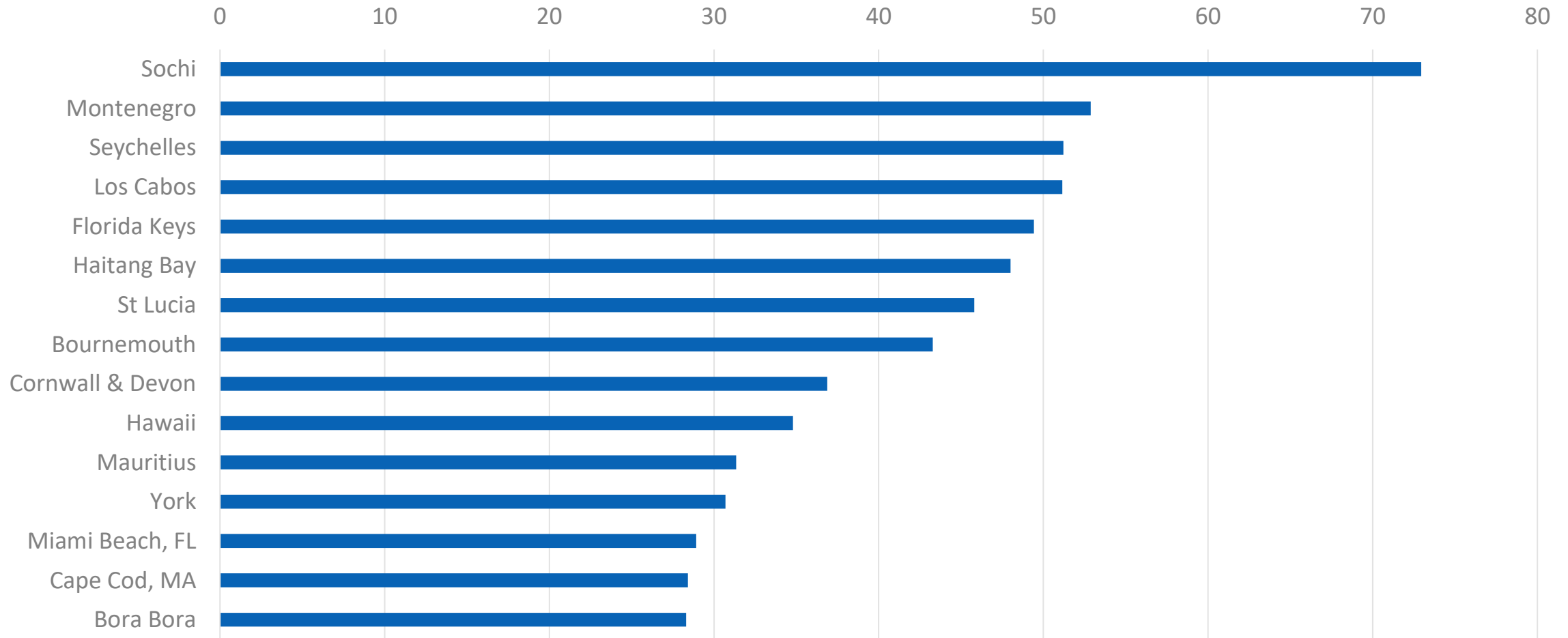
European major markets, ADR (Local Currency) indexed to 2019, Full Year 2021



Inlaendische Freizeitdestinationen und deren ADR Boom



Selection of STR markets with highest ADR growth, 2021 Percent change from 2019

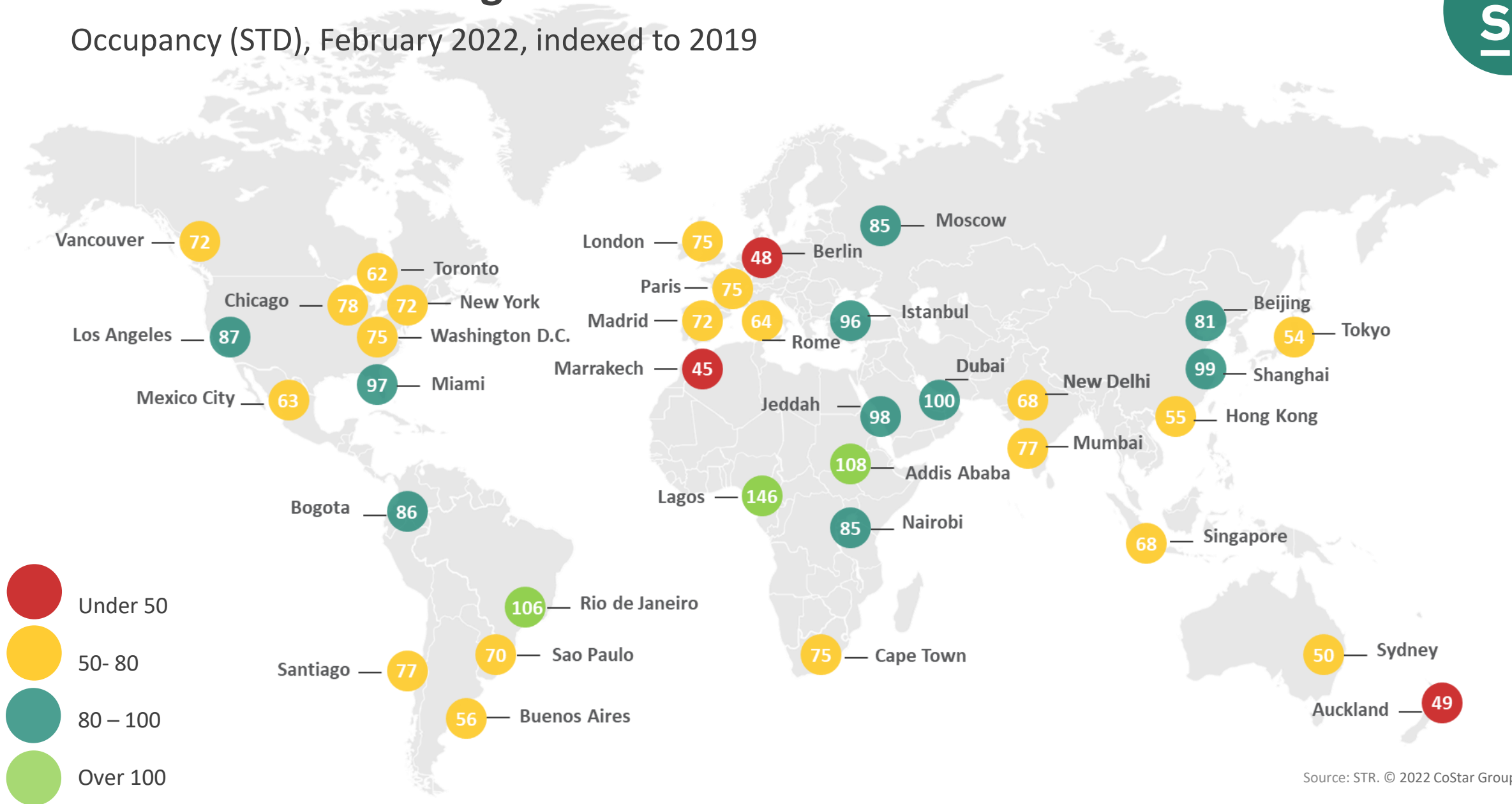




2022 ***Neuer Anfang?***

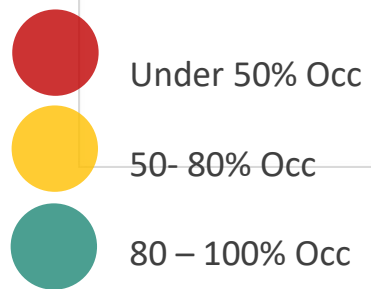
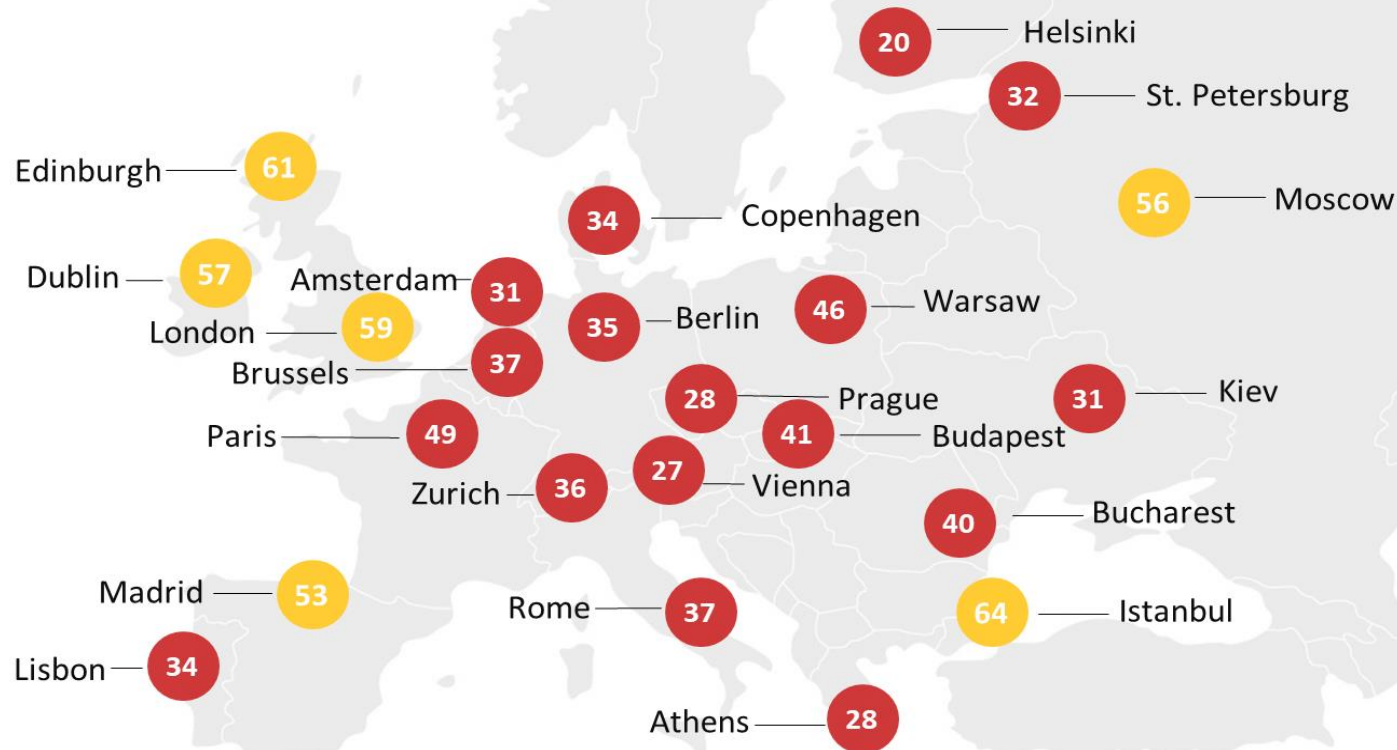
Die Welt auf Erholungskurs

Occupancy (STD), February 2022, indexed to 2019



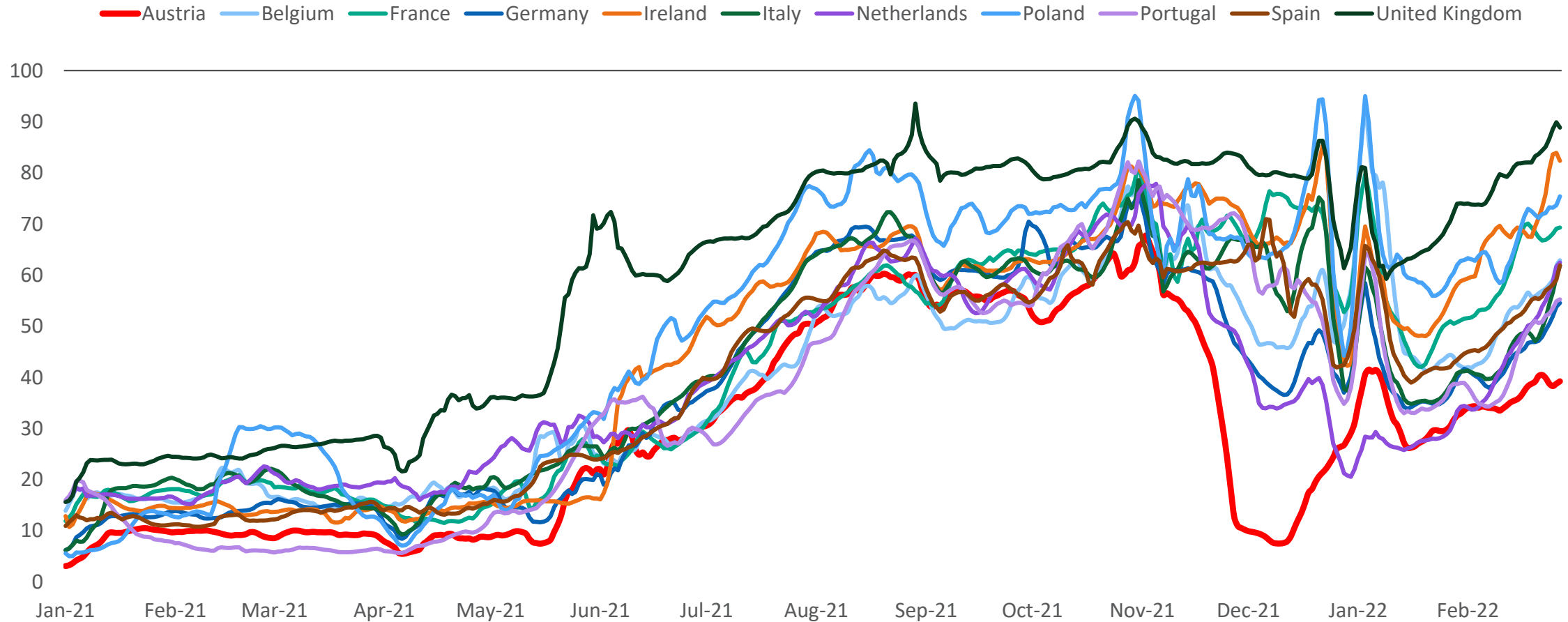
Luft nach oben in Europa

European major markets, Occupancy (STD), February 2022



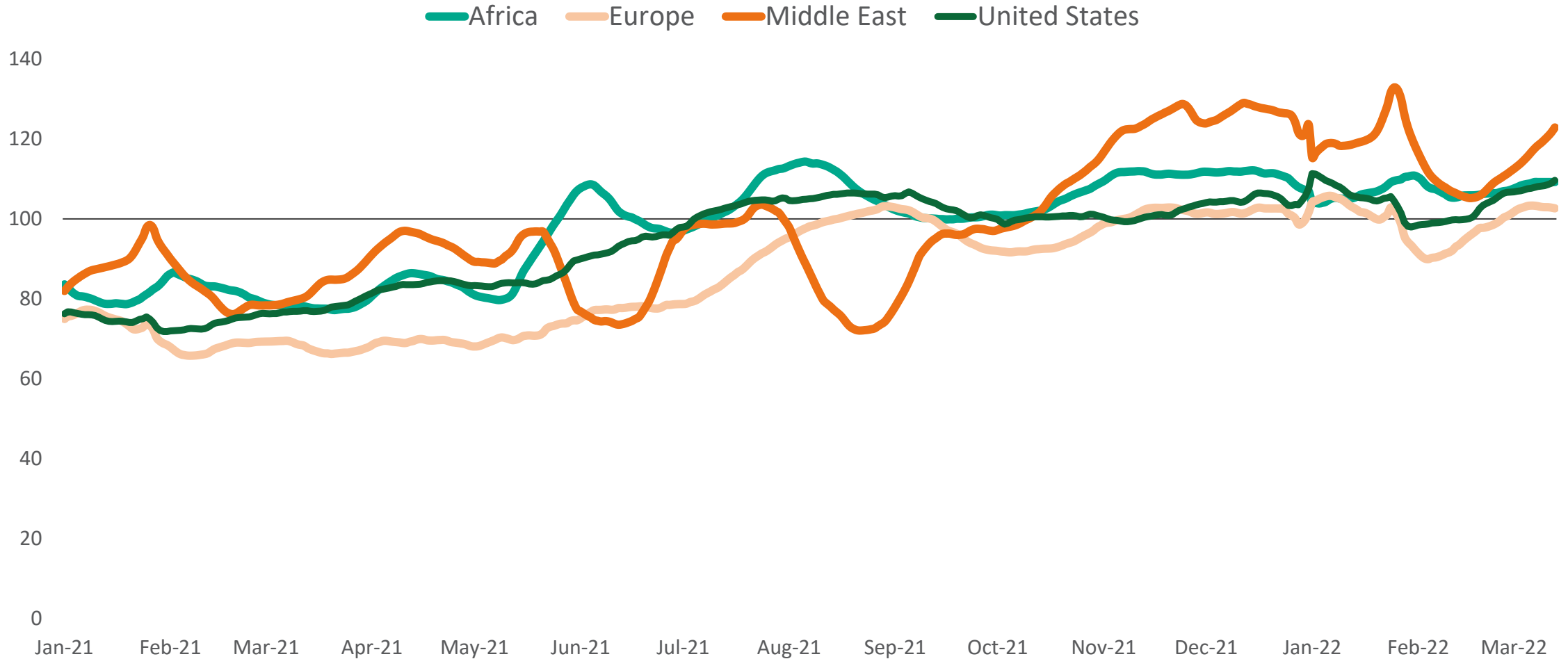
United Kingdom gibt den Trend vor

Occupancy (TRI) R7 Jan 2021 to Feb 2022, indexed to 2019



Weltweite Erholung der Durchschnittsrate

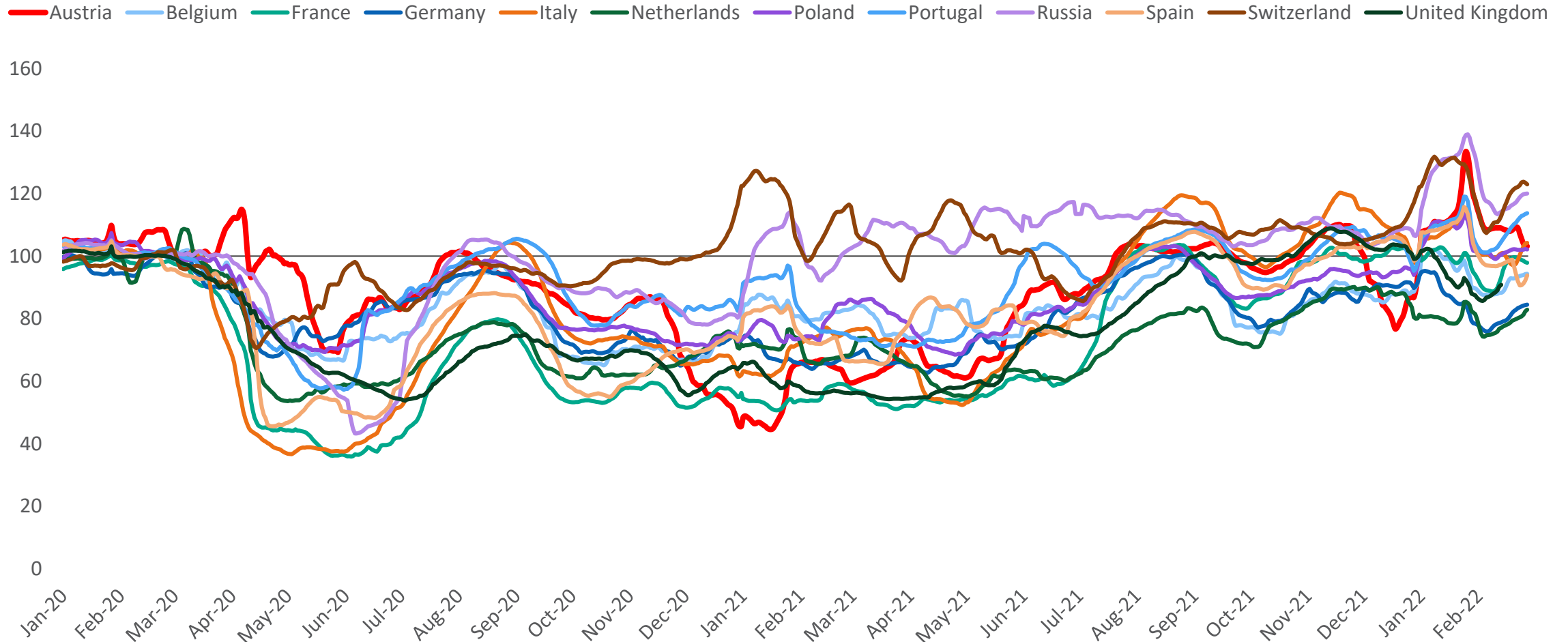
ADR R28 (USD) Constant Currency, indexed to 2019



Ein schwungvoller Start ins Jahr 2022 für viele europäische Länder



ADR (Local Currency) R28 Jan 2020 to Feb 2022, indexed to 2019

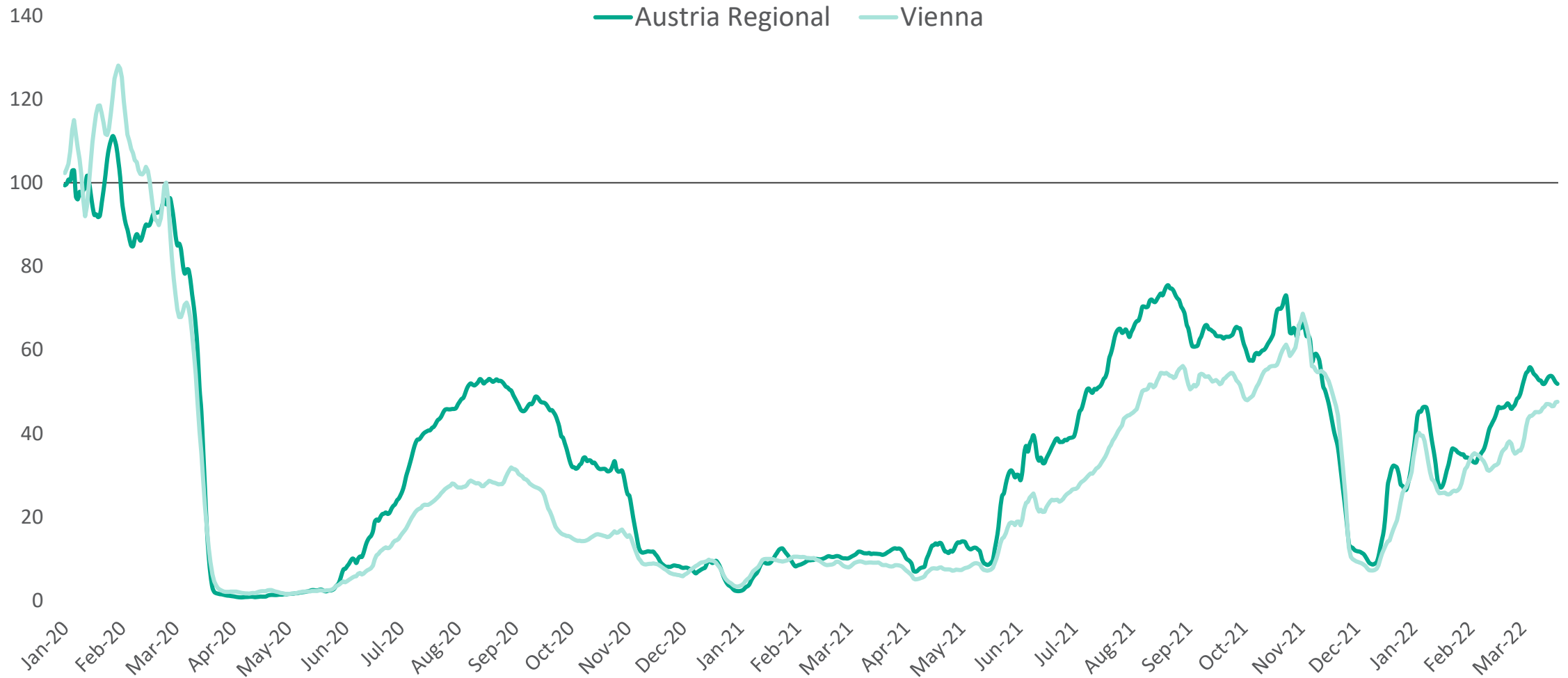




Deep Dive Wien

Die Auslastung erholt sich unterschiedlich

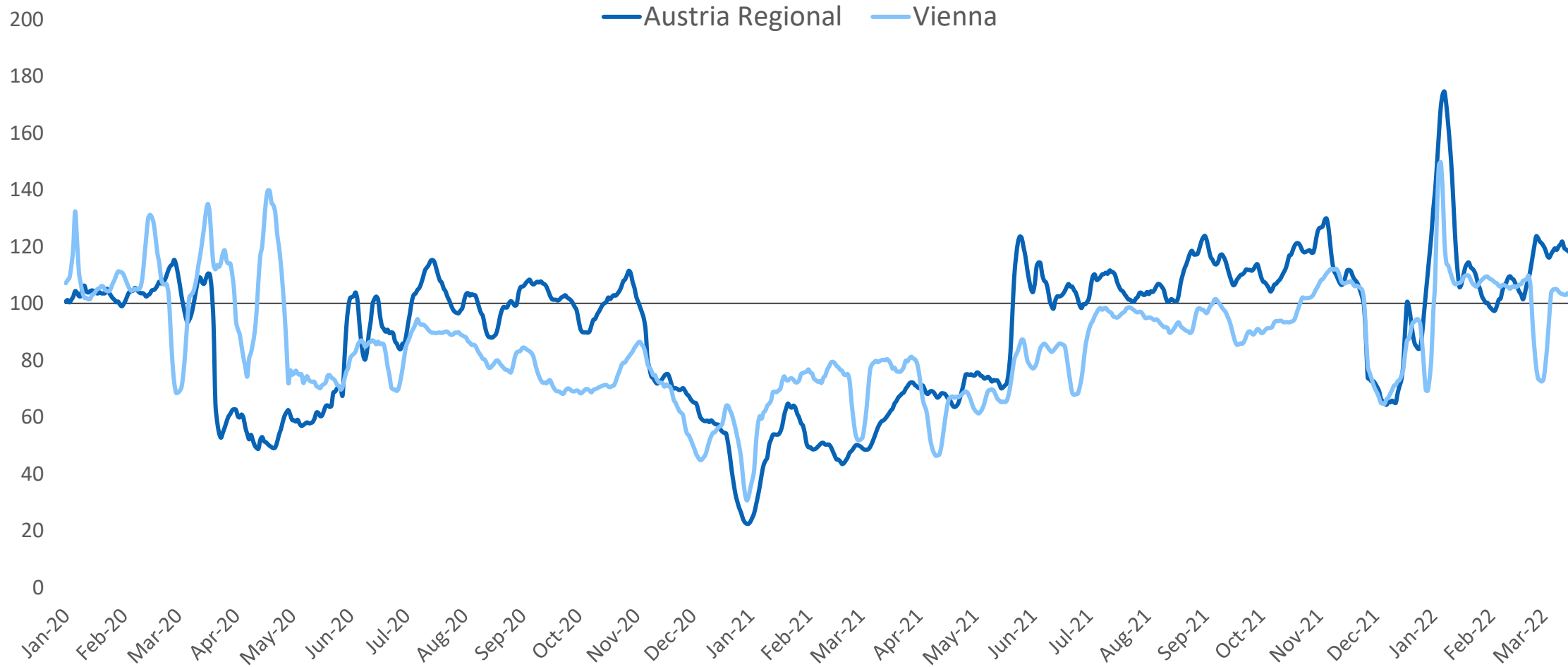
Occupancy R7 (TRI) Austria Regional vs Wien Jan 2020 to Mar 2022 indexed to 2019



Die Nachfrage ist das und der ADR steigt bereits über 2019 Level



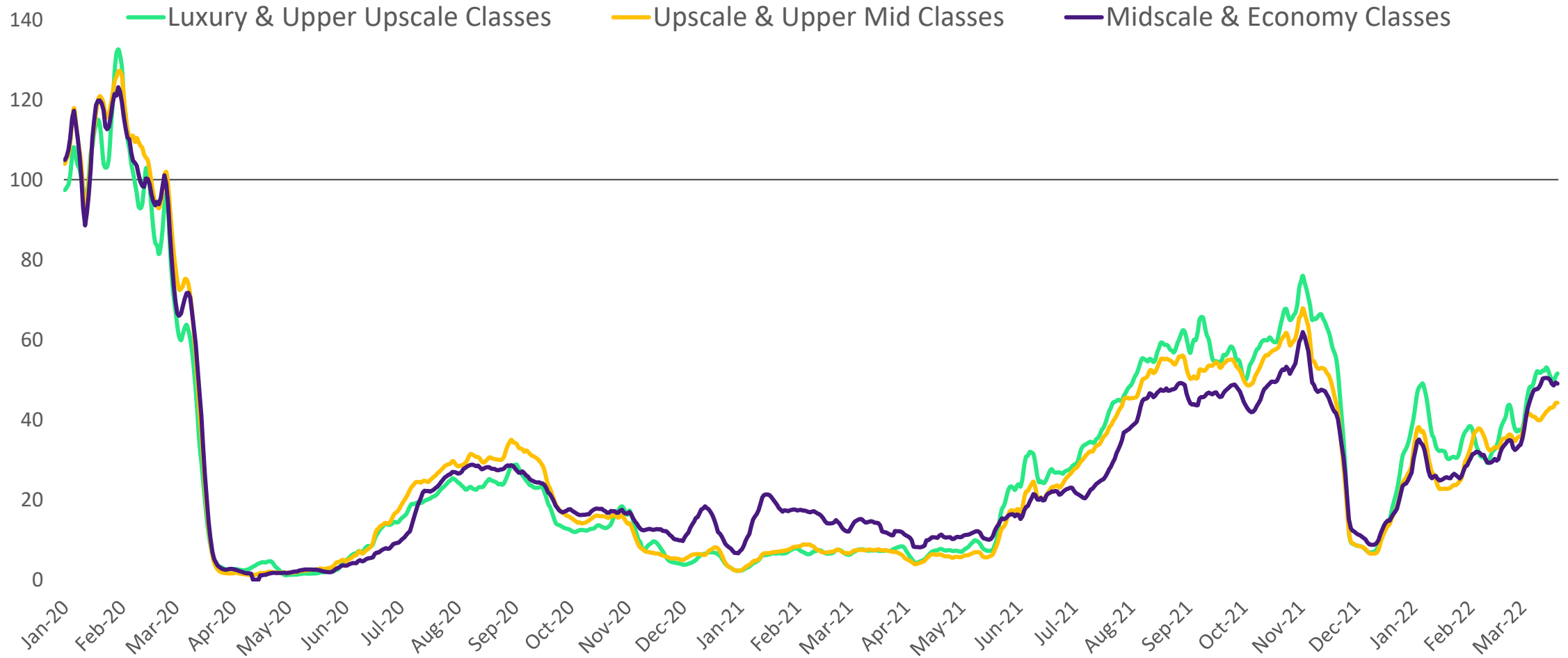
ADR (Local Currency) R7 Austria Regional vs Wien Jan 2020 to Mar 2022 indexed to 2019



Luxury Stadthotels on the go?



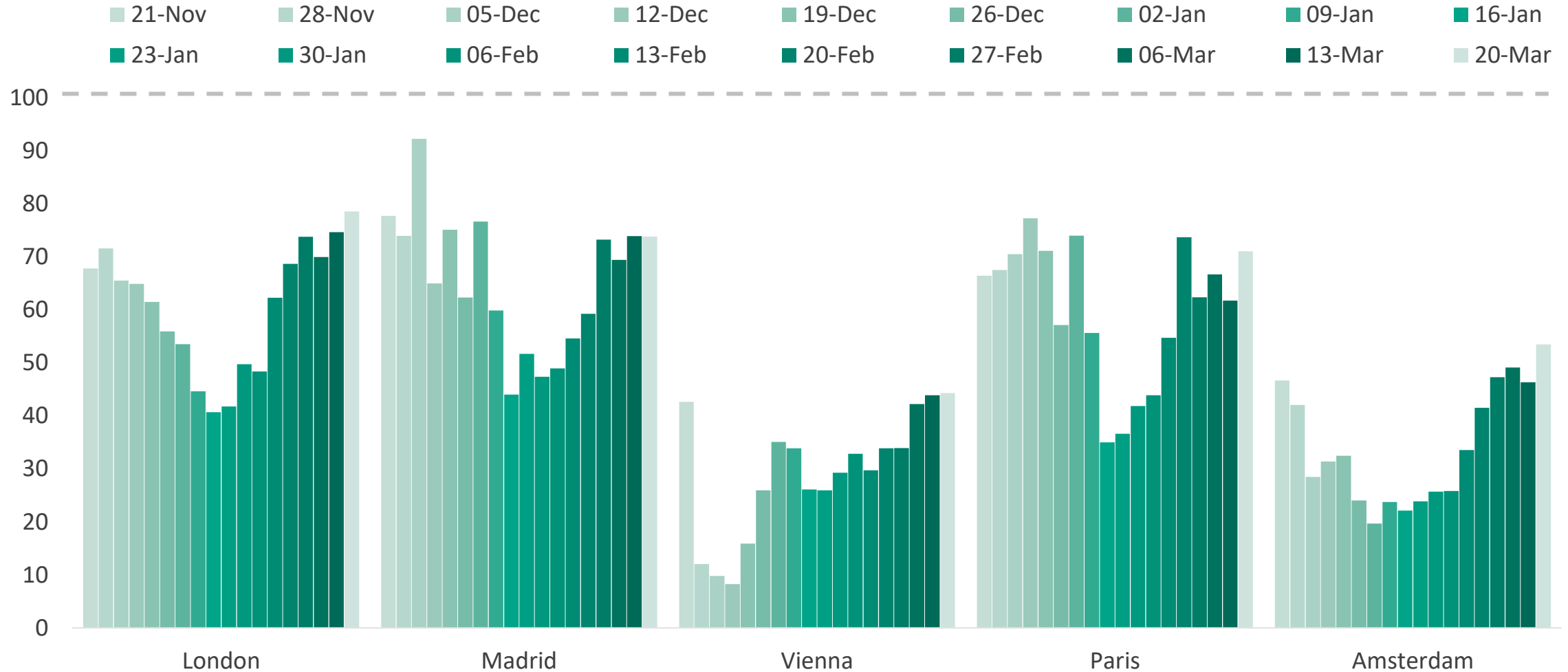
Occ R7 (TRI) Wien Collapsed Classes Jan 2020 to Mar 2022 indexed to 2019



Ist Businessstravel zurück?

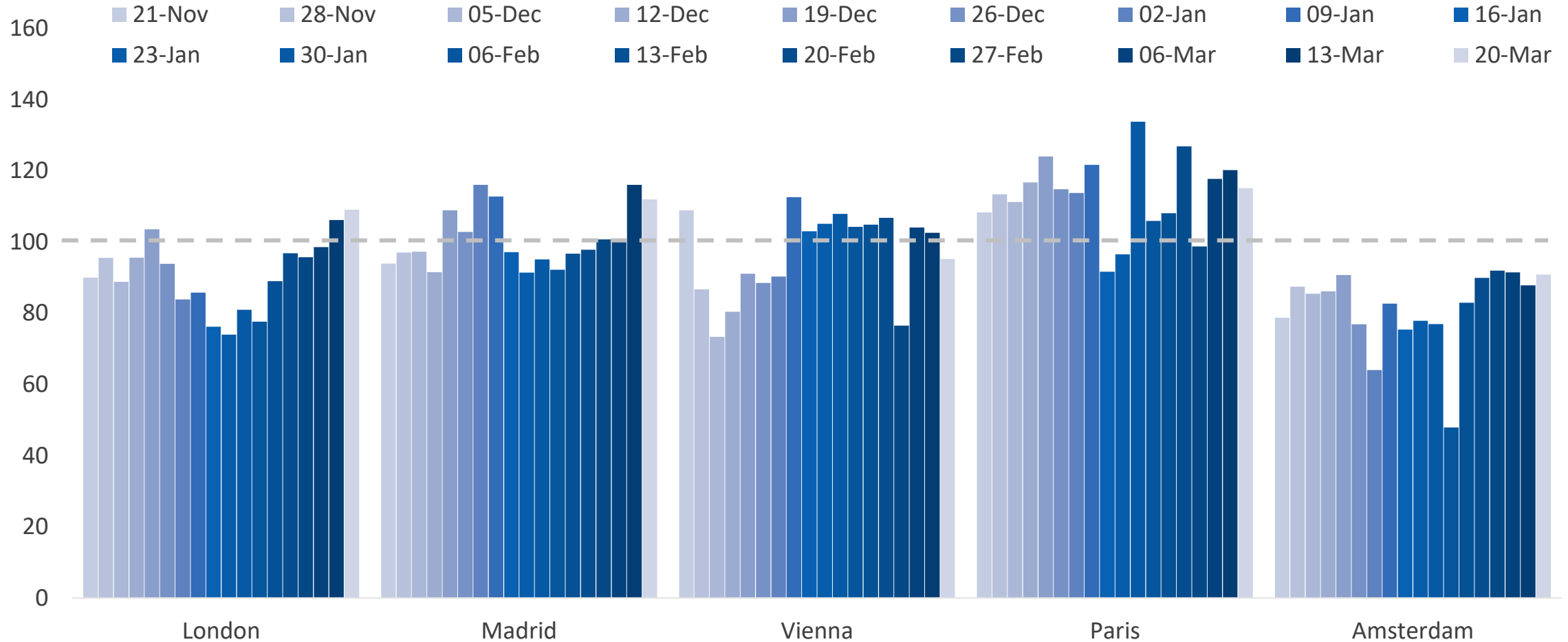


Weekday occupancy (TRI) indexed to 2019 21 Nov – 20 Mar 2022



ADR wächst durch die Stabilisation der Nachfrage

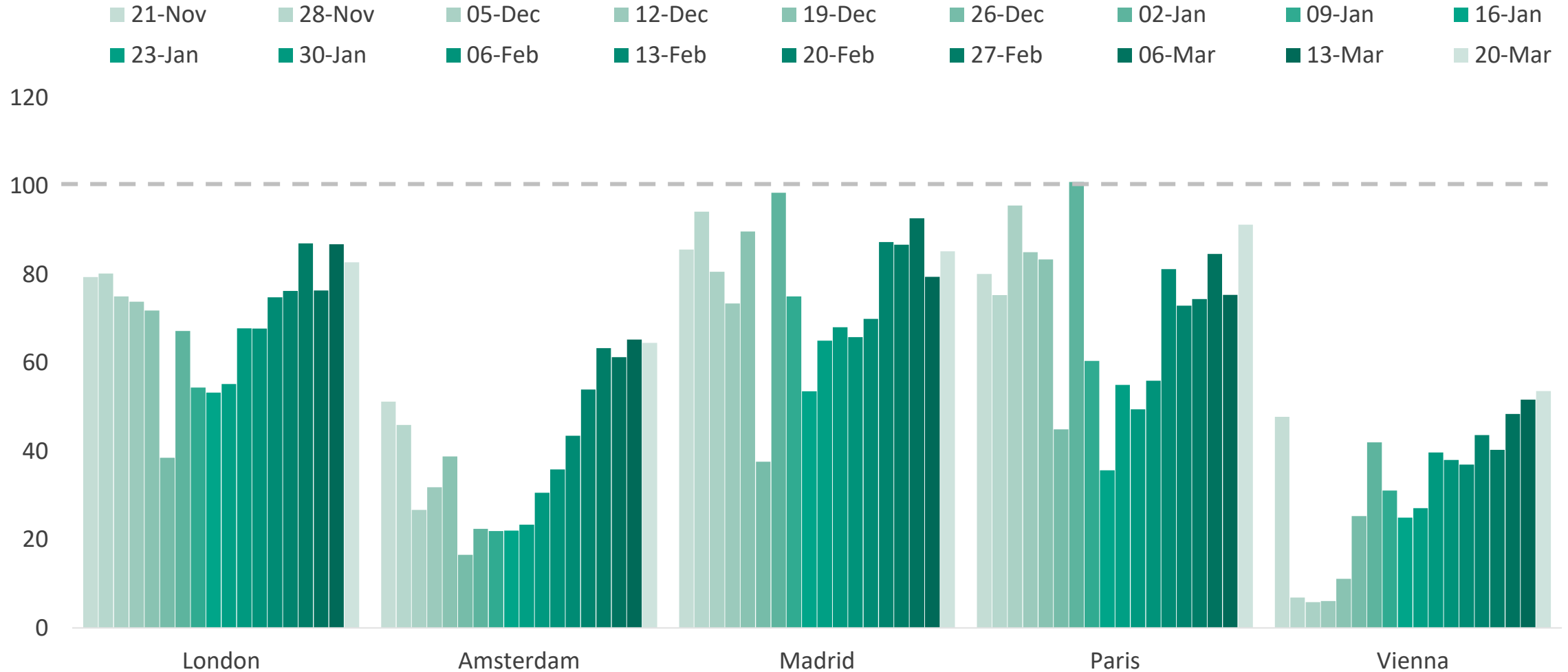
Weekday ADR (local currency) indexed to 2019, 21 Nov – 20 Mar 2022



Freizeitreisende immer noch der Treiber für die Weekends

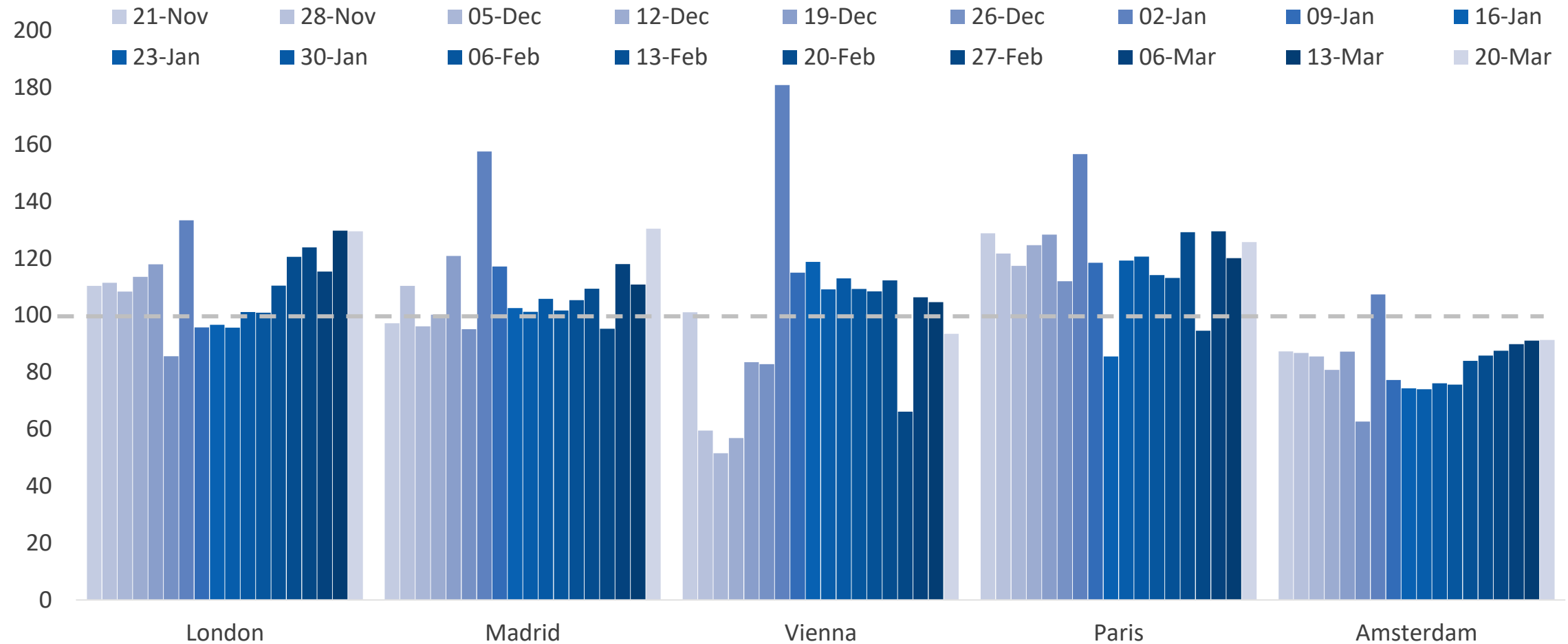


Weekend occupancy (TRI) indexed to 2019 21 Nov – 20 Mar 2022



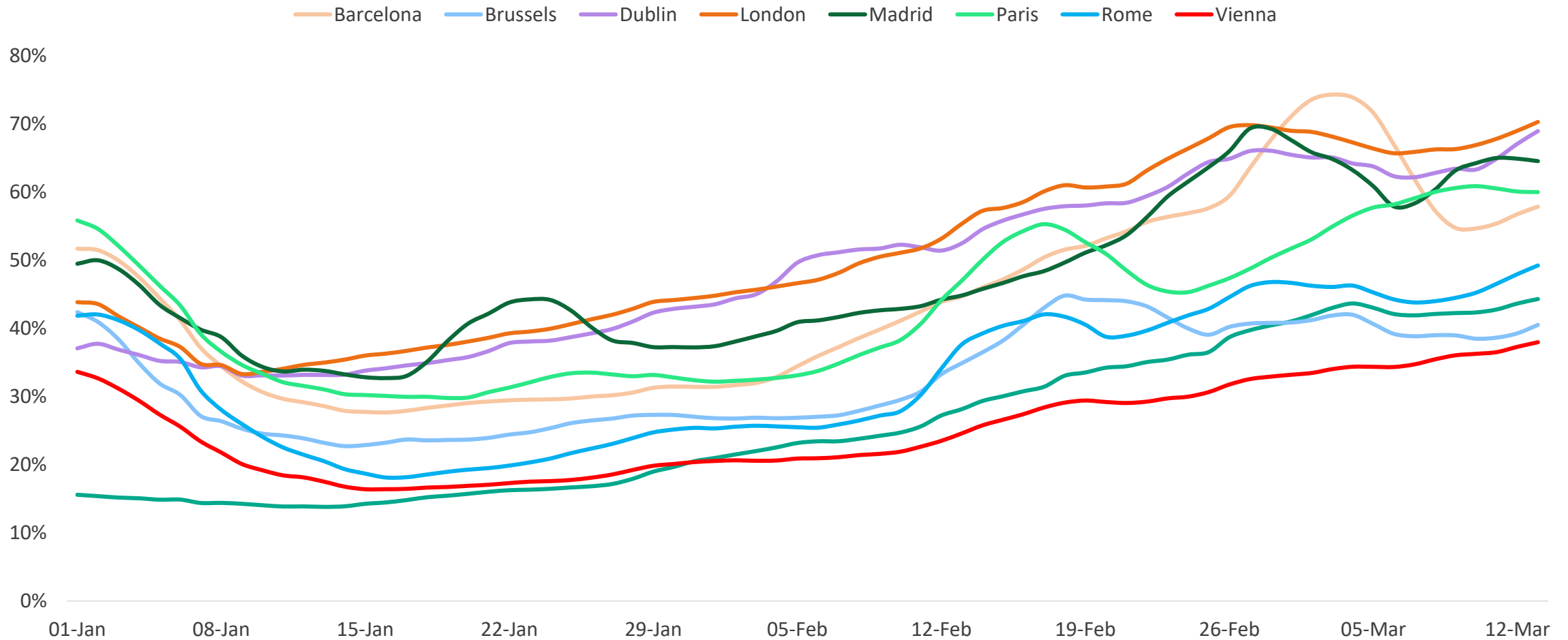
Weekend ADR topt 2019 Performance

Weekend ADR (local currency) indexed to 2019, 21 Nov – 20 Mar 2022



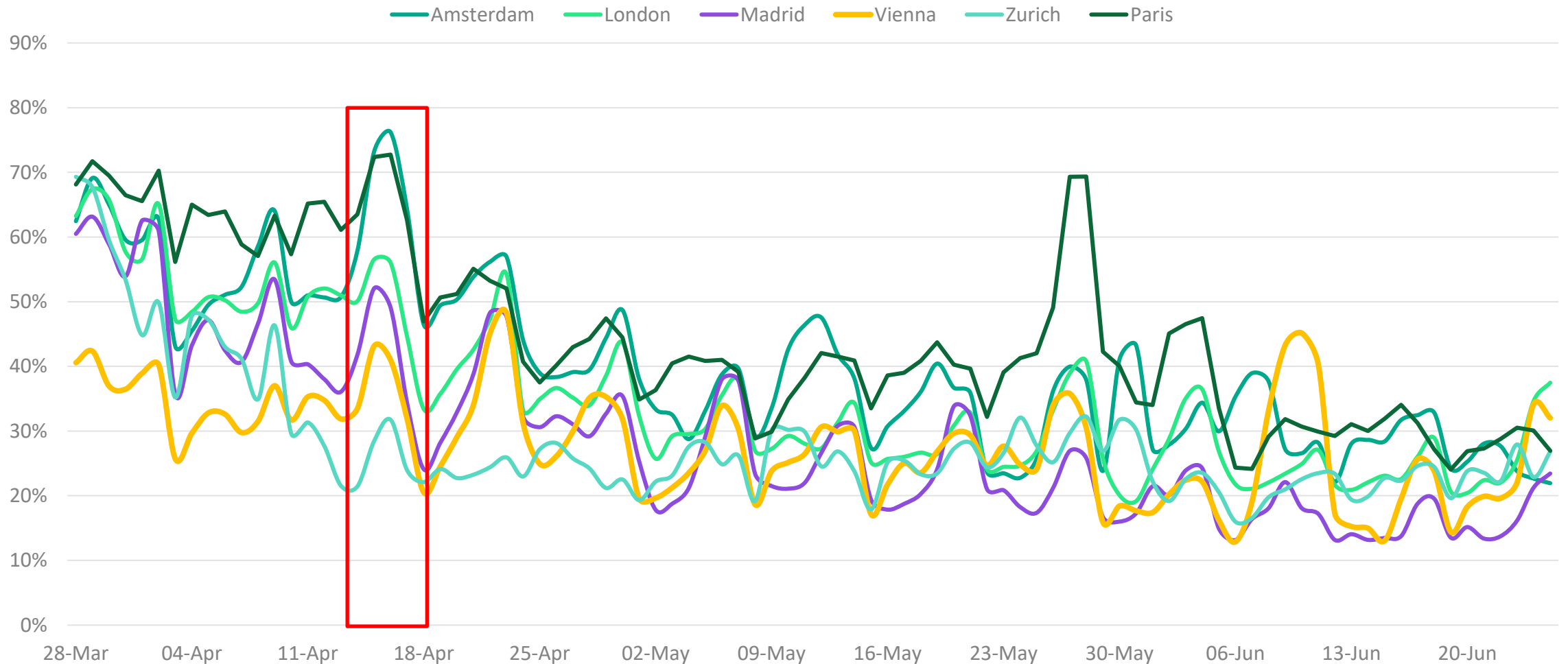
City Occ is trending up across Europe – ranging from 40-70%

Occupancy (STD) R7 Jan 2022 to Mar 2022



Internationaler Ausblick BOB

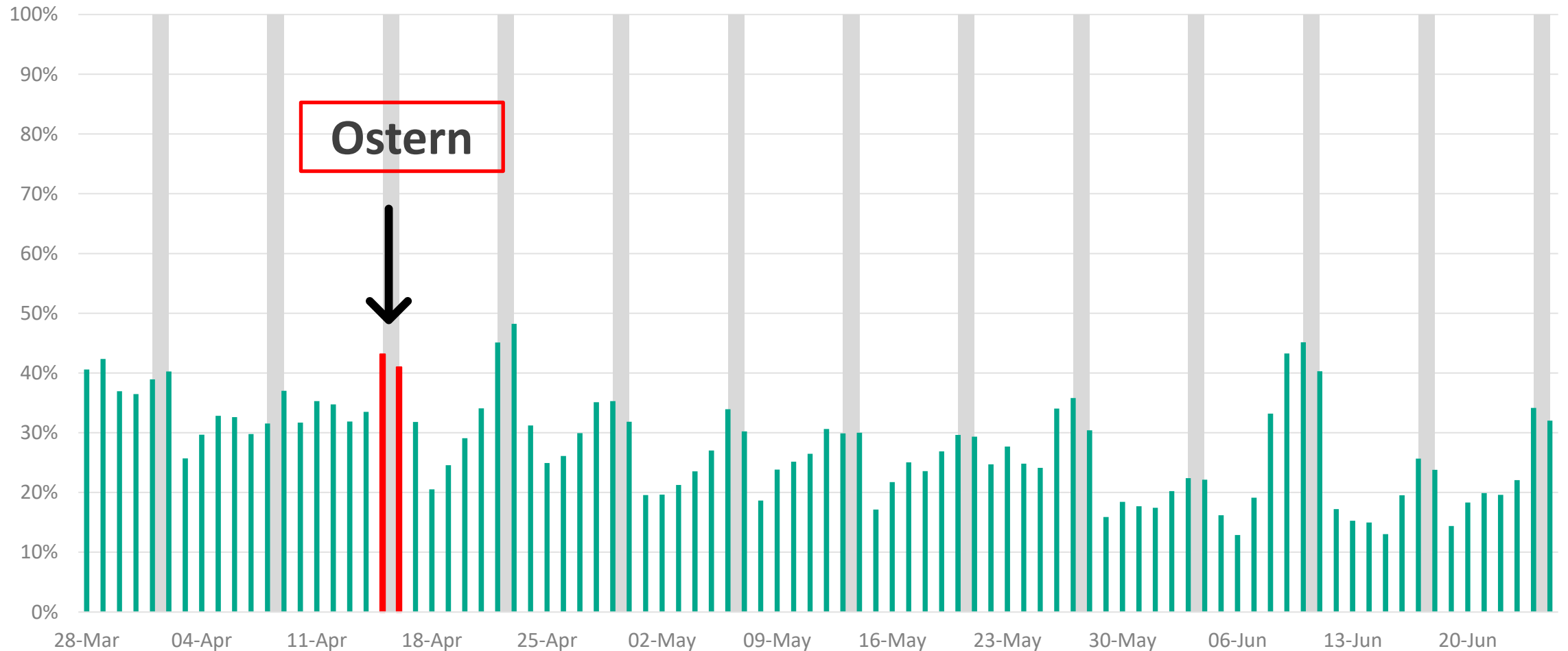
Occupancy (Standard) on the books for the next 90 days as at 14 March 2022



Wochenende in Wien on top gegenüber den Wochentagen



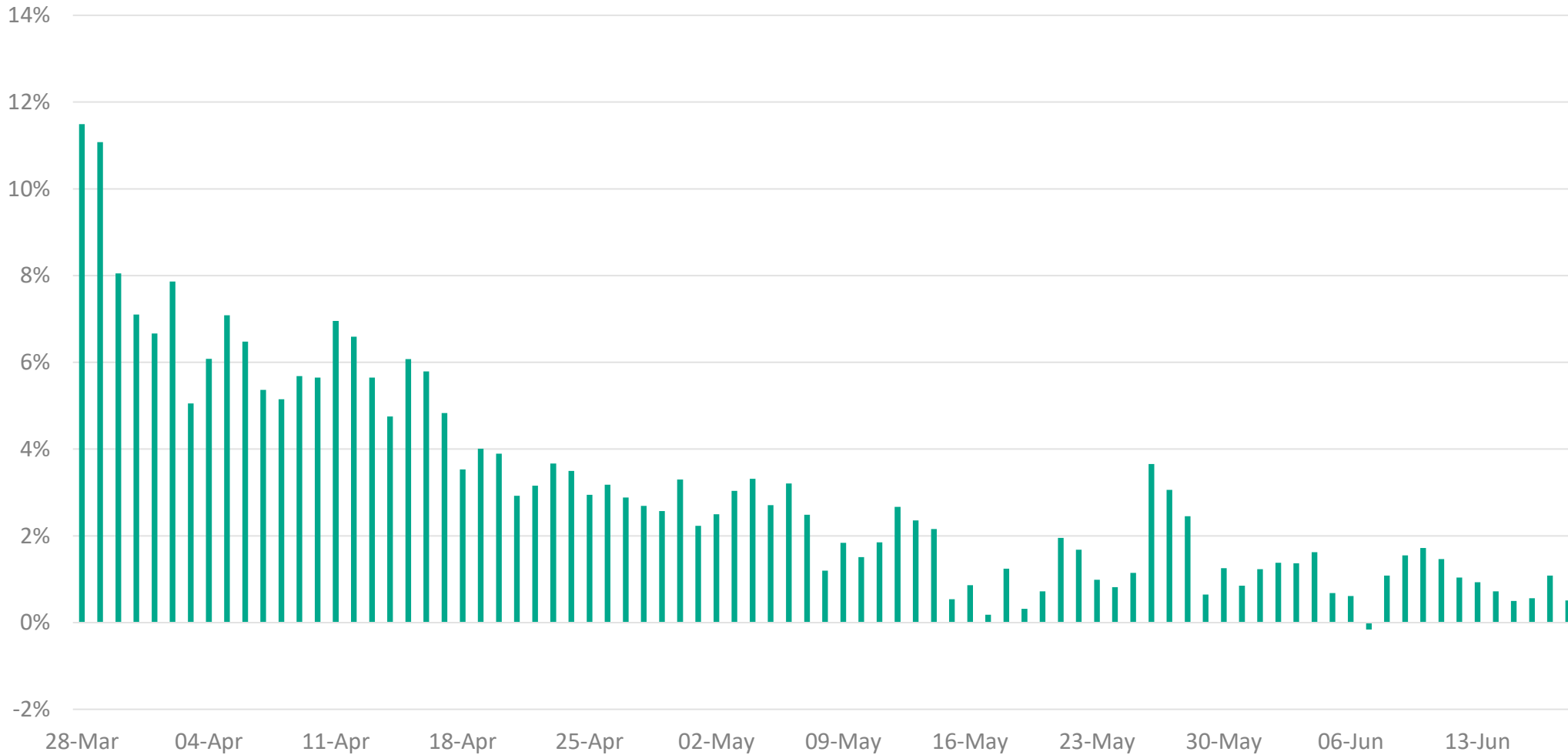
Wien, Occupancy on the books für die nächsten 90 Tage per 28 März 2022



Wien - Wöchentlicher pickup für die nächsten 83 Tage



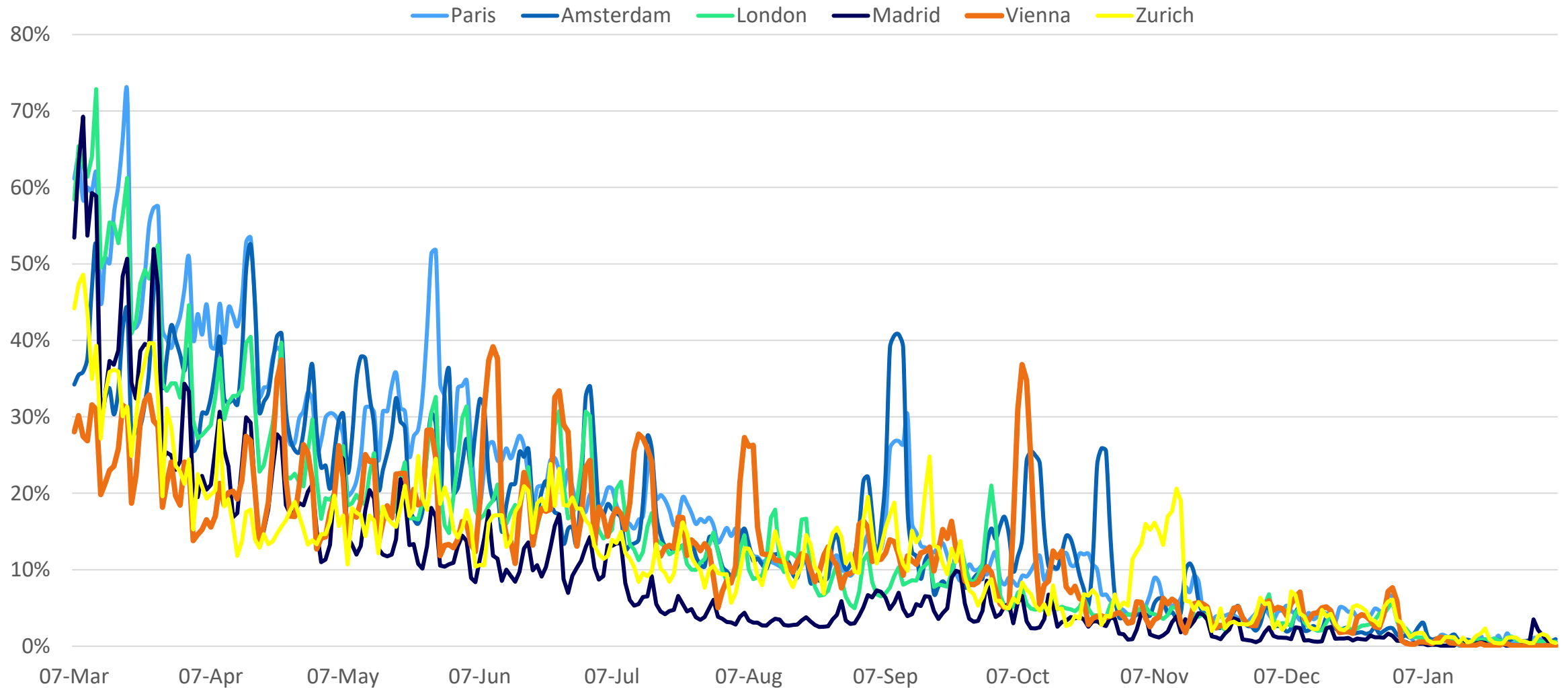
Wien, Pick up für die nächsten 83 Tage per 28 März 2022



Europäischer Vergleich der Business on the book



Occupancy on the books for the next 365 days as at 07 March 2022





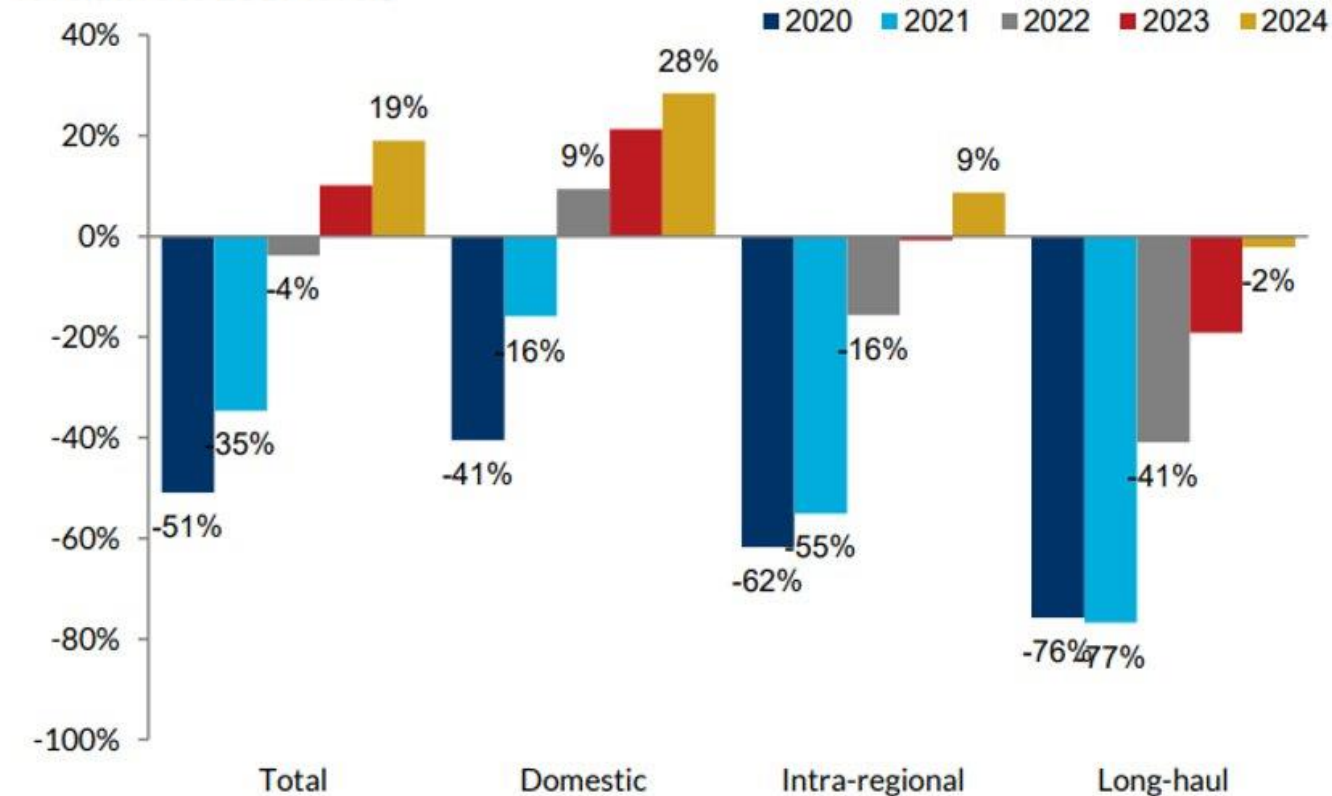
Ausblick

Domestic and intra-regional travel remain key to recovery



Europe: recovery by travel segment

% relative to 2019 levels



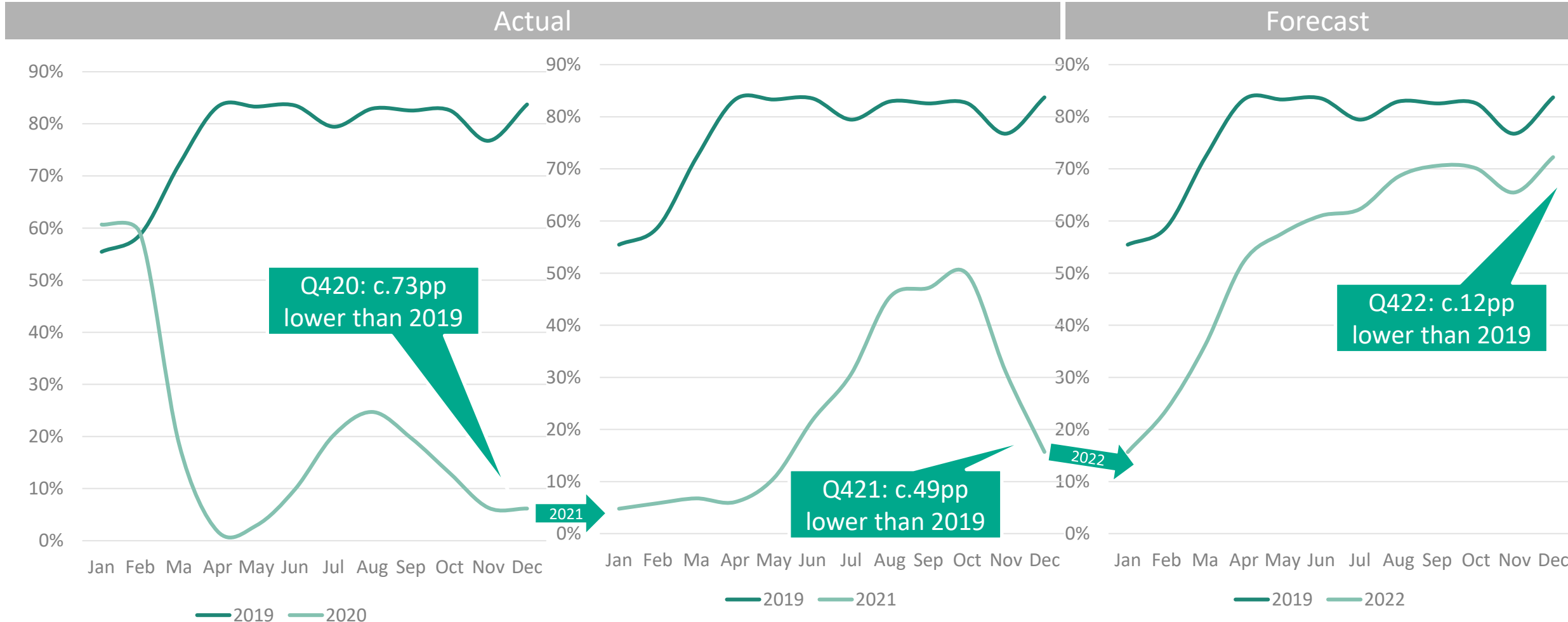
Source: Oxford Economics

Recovery to 2019 levels:

- Domestic 2022
- International 2024
- Total 2023

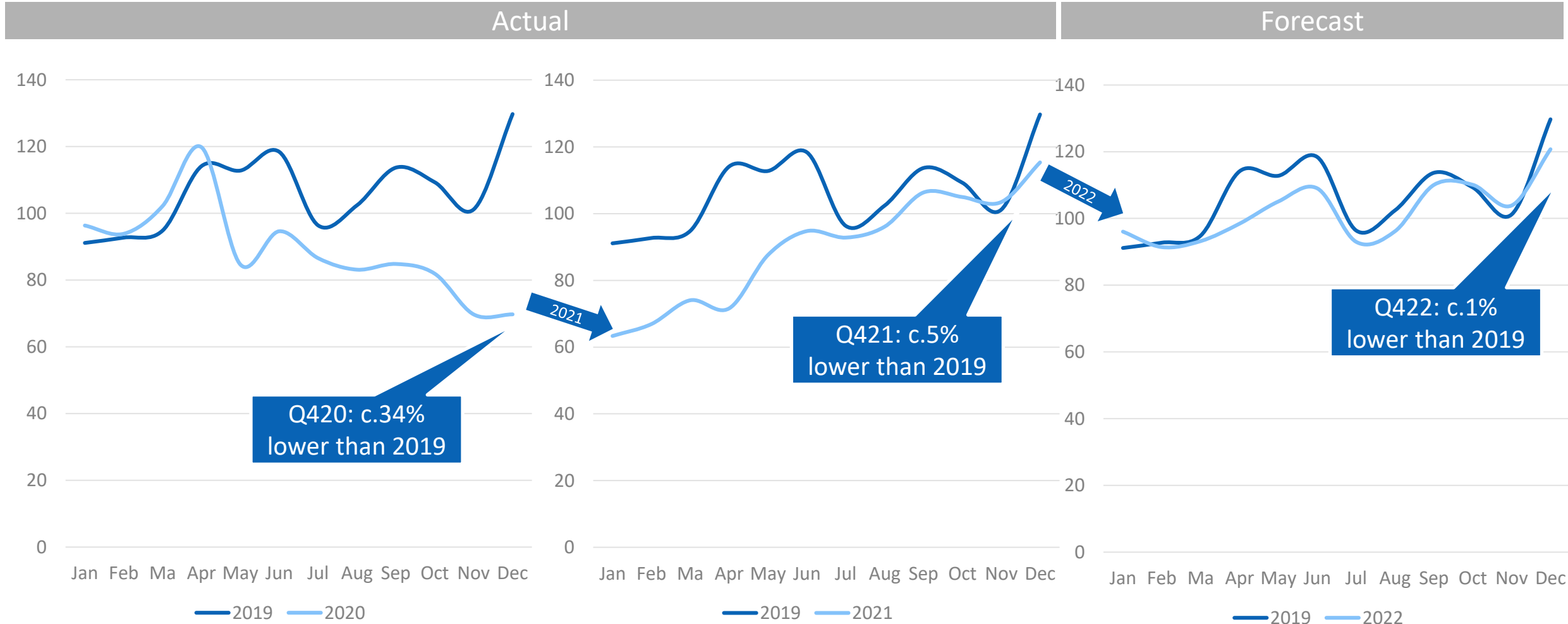
Die Auswirkungen von Omicron konzentrieren sich auf Q1 2022

Wien, Occupancy, Februar 2022 Forecast



ADR Erholung robuster als bisher erwartet

Wien, ADR, EUR, Februar 2022 Forecast



Key takeaways



Wir haben 2020/21 Widerstandsfähigkeit bewiesen, wir werden 2022 beweisen, dass wir die Stärke haben uns zu erholen

1

Die Nachfrage hat und wird sich weiter erholen
... und wir sogar 2019 überholen

2

Nachholbedarf ist vorhanden und ermöglicht ADR Wachstum
... die Inflation ist nicht der einzige Treiber, wird aber die Rentabilität in Frage stellen

3

Die Branche steht vor vielen Herausforderungen
... aber das Verlangen zu reisen und sich wieder zu treffen bleibt



Fragen?



www.str.com

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**HOTEL DATA
CONFERENCE**
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