



KHN

Amsterdam Hoteloverleg

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Area Manager Market Management
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12.06.2025

INTRODUCTIE

Expedia Group



Jean-Philippe Monod

SVP | Government & Corporate Affairs

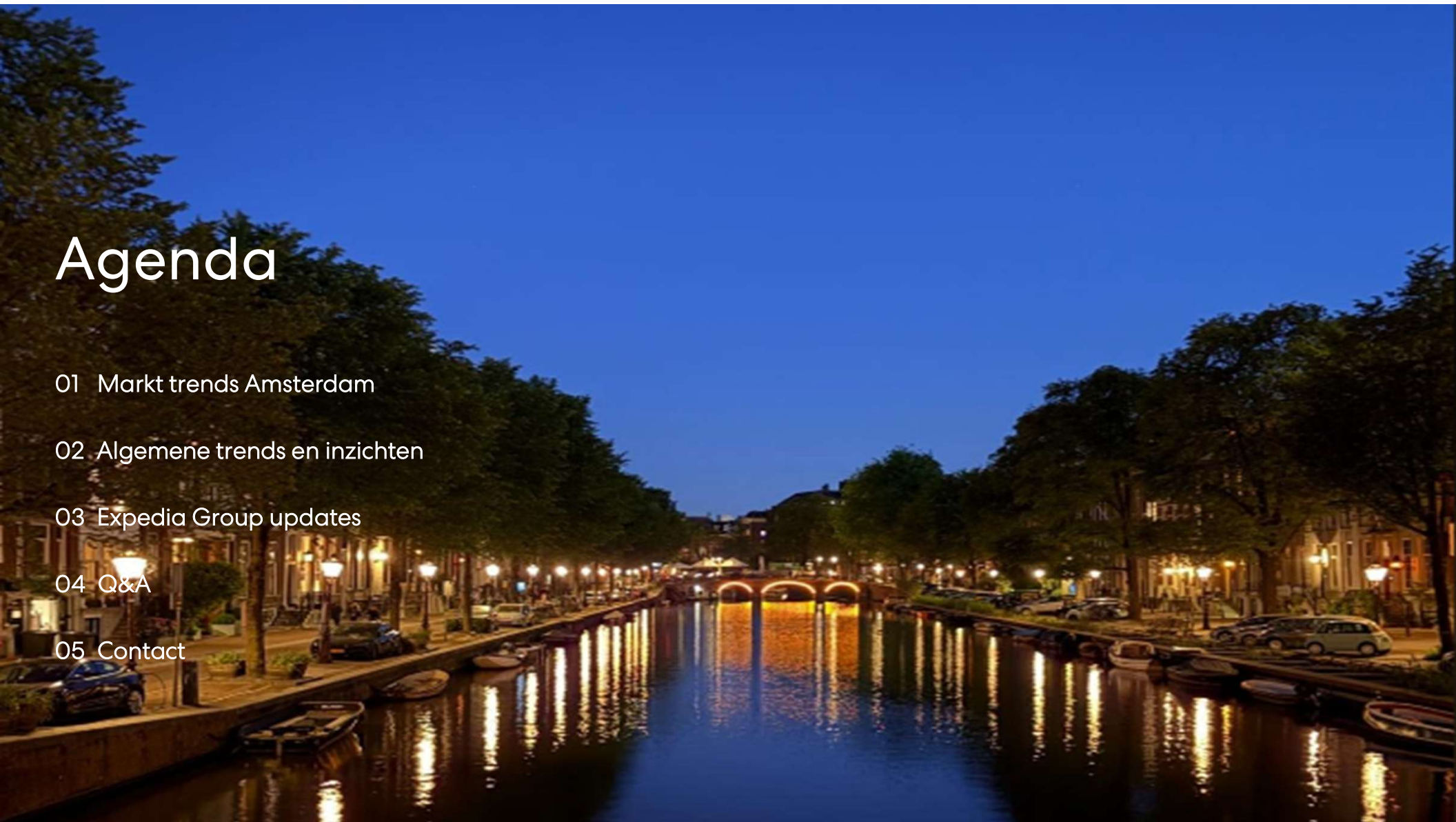


Barbara Akkermans

Area Manager Market Management
Amsterdam & Regional Netherlands

Agenda

- 01 Markt trends Amsterdam
- 02 Algemene trends en inzichten
- 03 Expedia Group updates
- 04 Q&A
- 05 Contact



Agenda

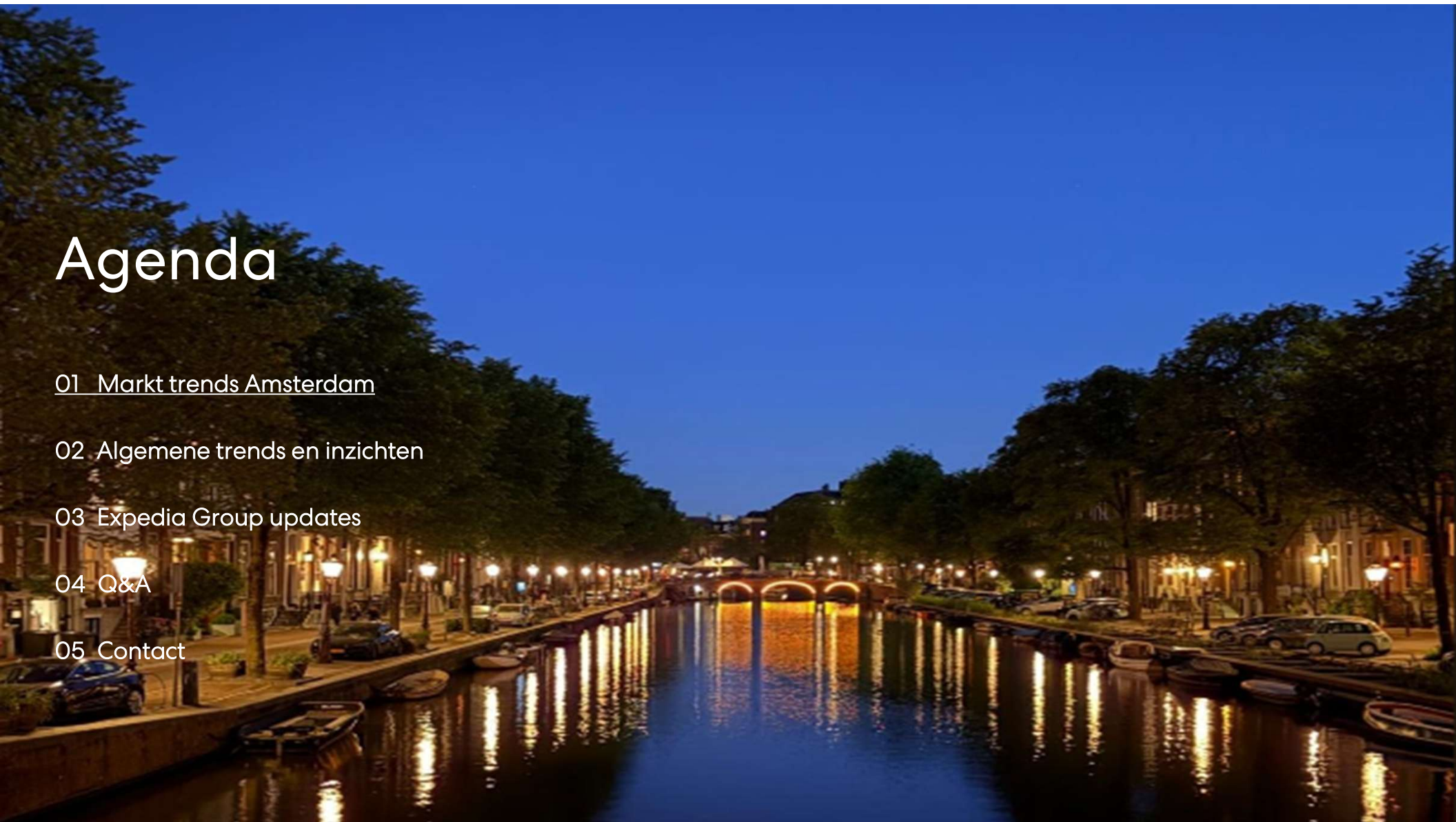
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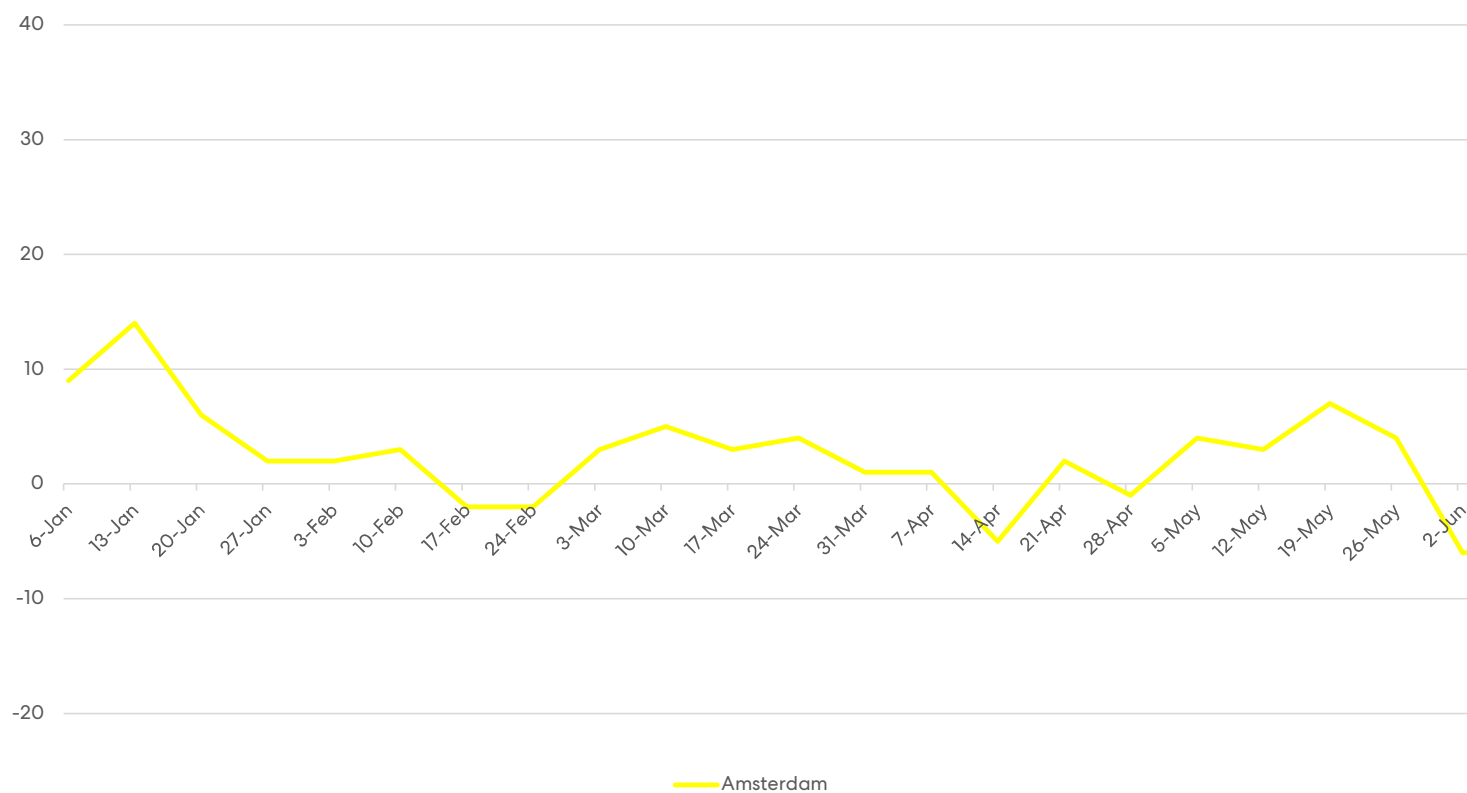
04 Q&A

05 Contact



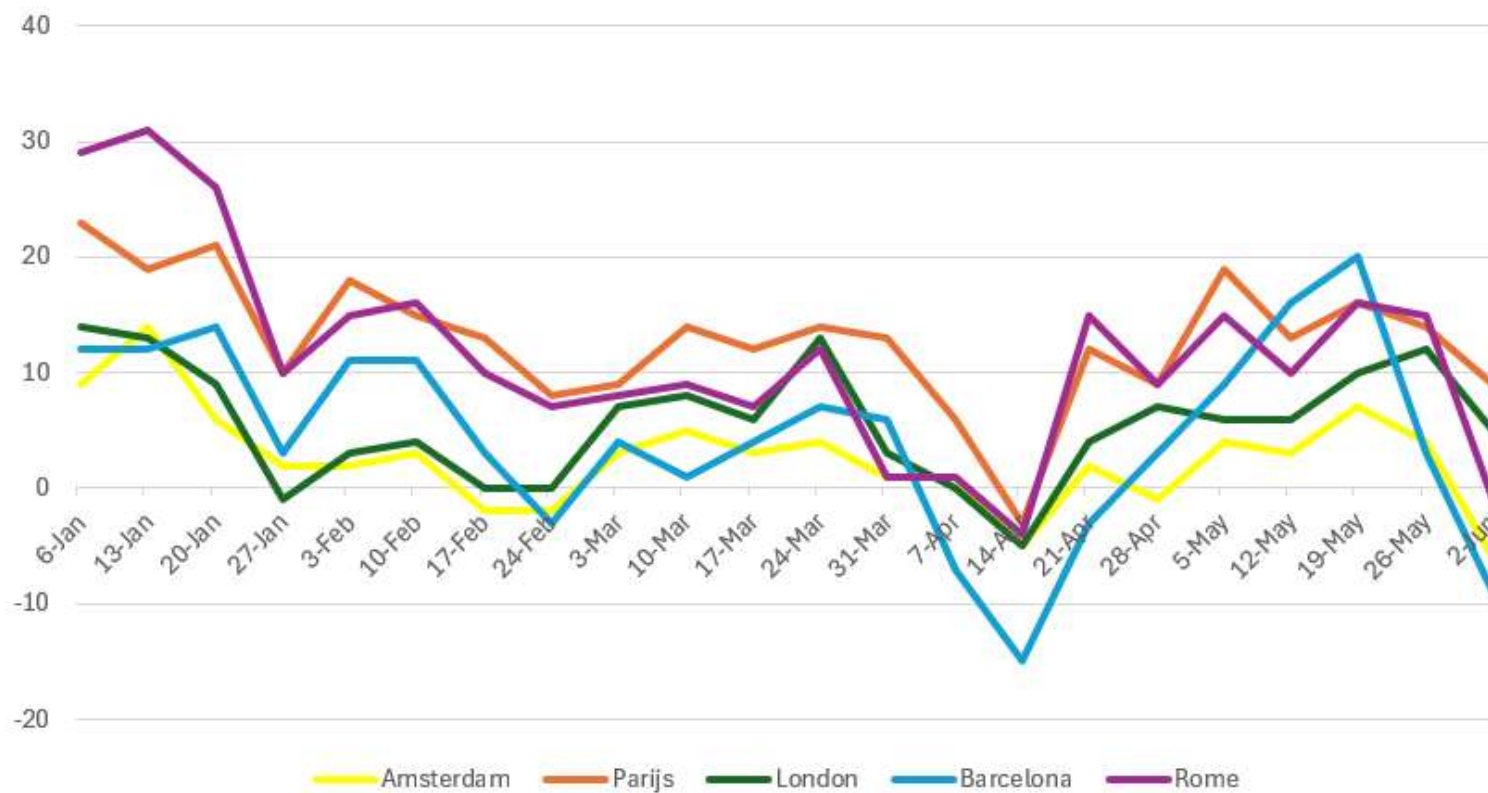
GEBOEKT YTD

Amsterdam ok gestart, nu schommelingen rondom 0-lijn; ytd +3%



GEBOEKT YTD

Andere Europese steden tonen een wat positievere trend



GEBOEKT YTD

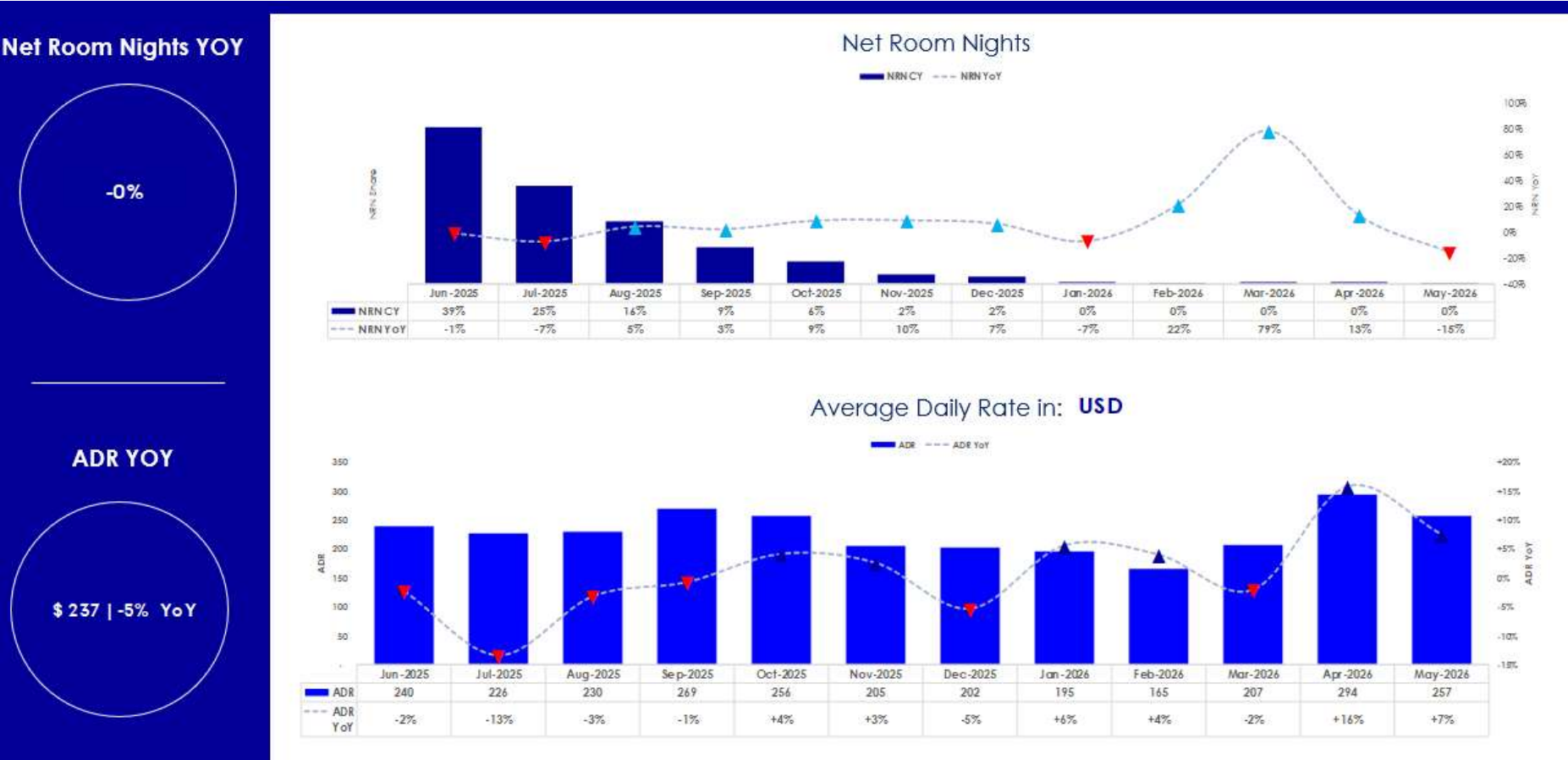
Overnachtingen luxe(re) segment stijgen, ADR daalt overall

(in andere grote Europese steden stijgt 3* segment)

	 Room Nights	 Average Daily Rate	 Booking Window	 Length of Stay	 Cancellation
3 Star Rating	-4% (share 31%)	\$ 175 -5%	46 -2.60	2.4 +0.01	28.3% +0.2pp
4 Star Rating	+5% (share 52%)	\$ 222 -4%	44 +1.30	2.3 +0.04	26.1% +0.4pp
5 Star Rating	+12% (share 8%)	\$ 476 -2%	51 +5.10	2.6 +0.06	29.7% -0.7pp

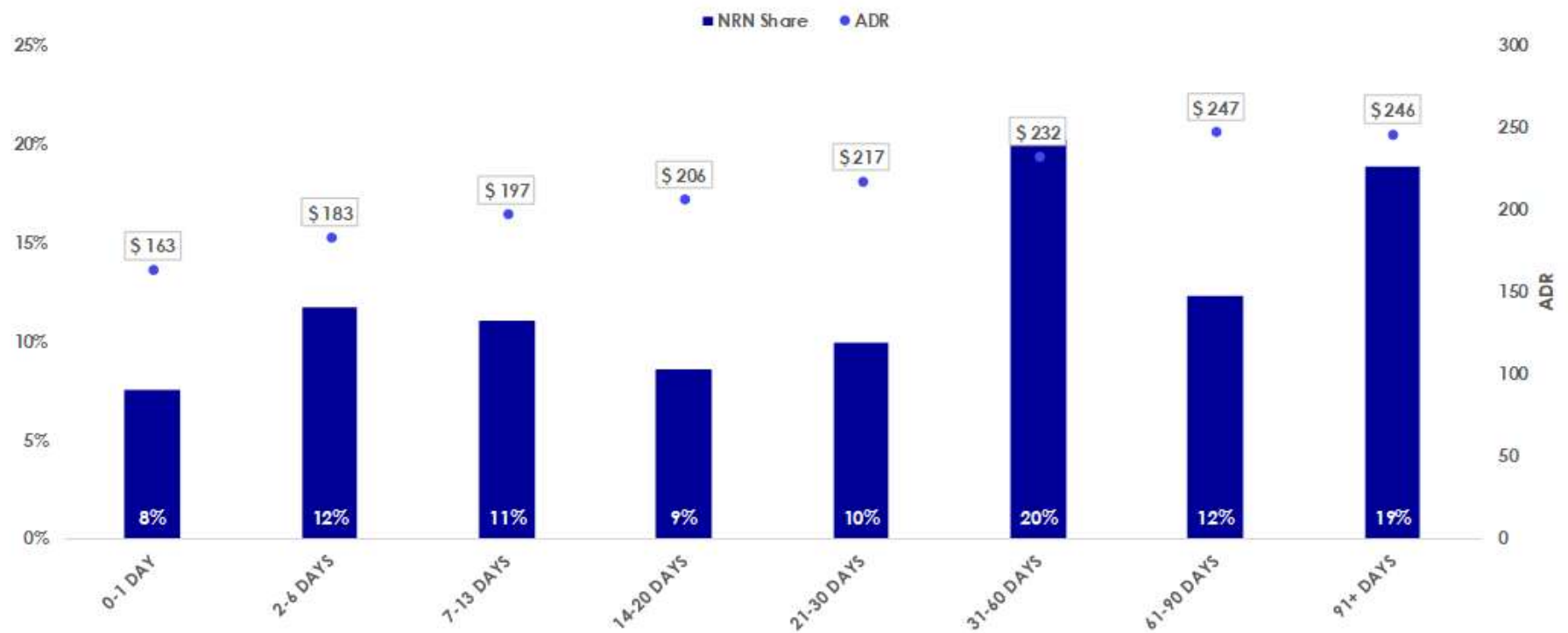
GEBOEKT YTD, TOEKOMSTIGE VERBLIJVEN

Juli; ‘Taylor Swift effect’- zowel vraag als ADR in min



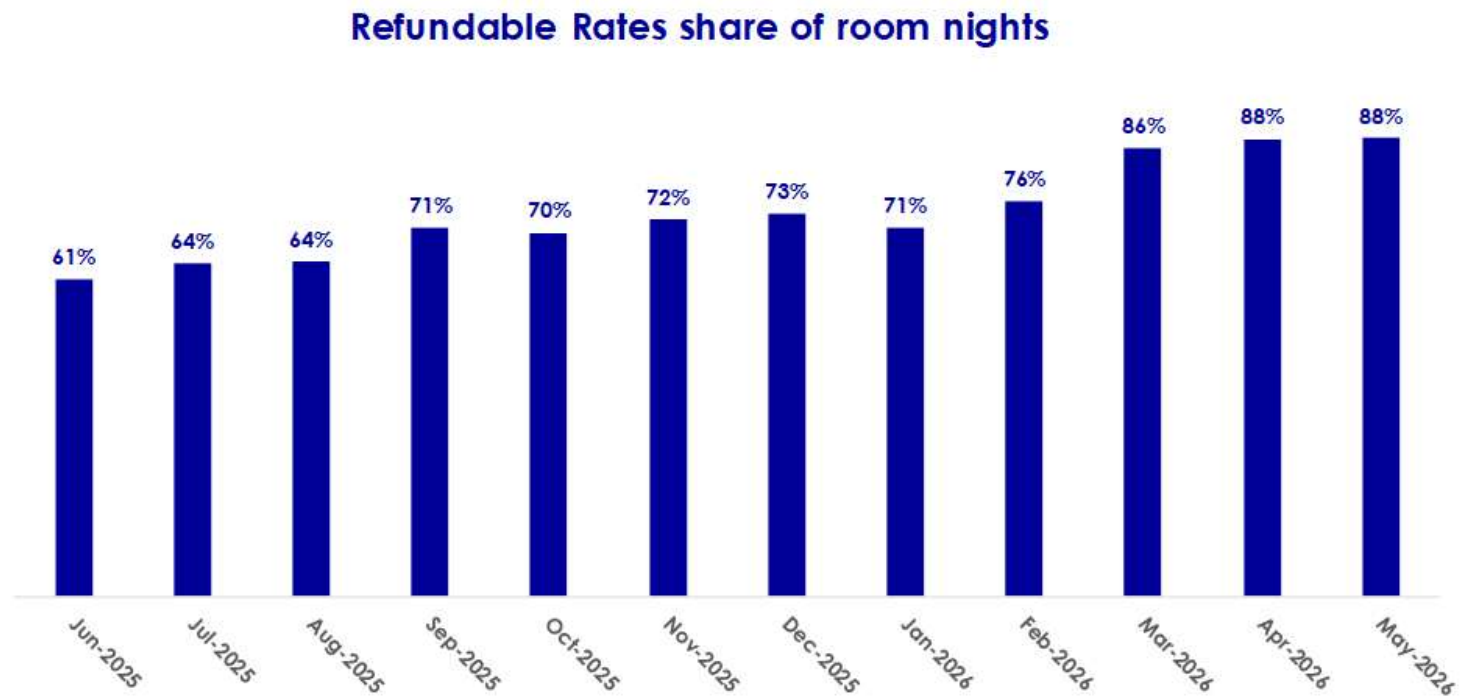
YTD GEBOEKT - PRIJSDALINGEN ROND DE 34% VER VOOR VERTREK TOT DAG VAN AANKOMST

Drie weken tot datum aankomst; ADR daling van \$43



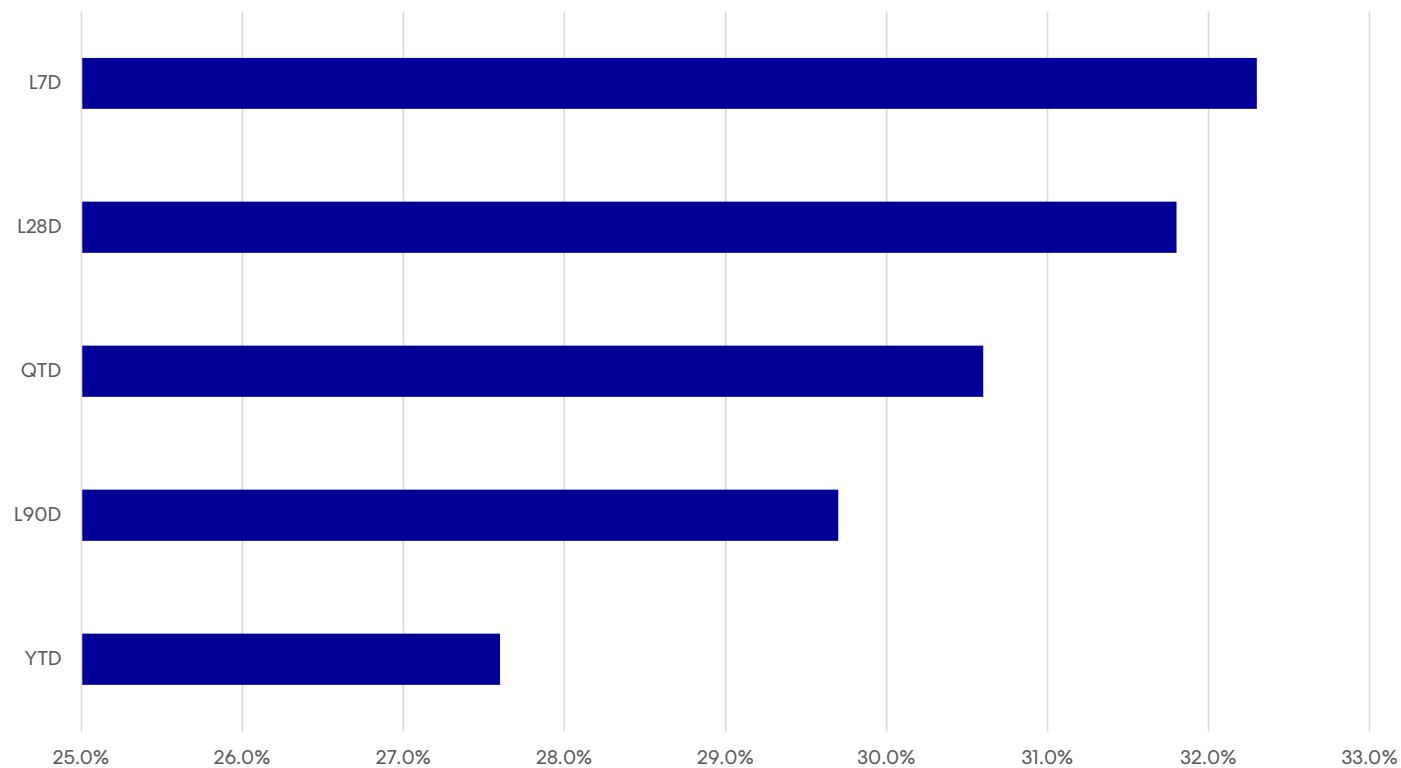
GEBOEKT YTD, VERBLIJVEN IN KOMENDE 12 MAANDEN

Ver vooruit vooral flex, (licht) dalend versus laatste jaren



GEBOEKT YTD

Annuleringspercentage toont stijgende lijn

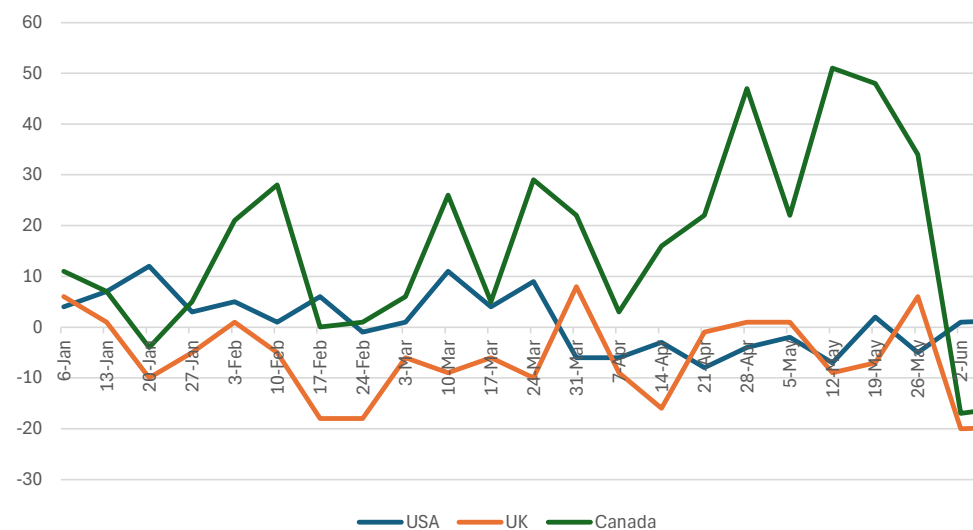
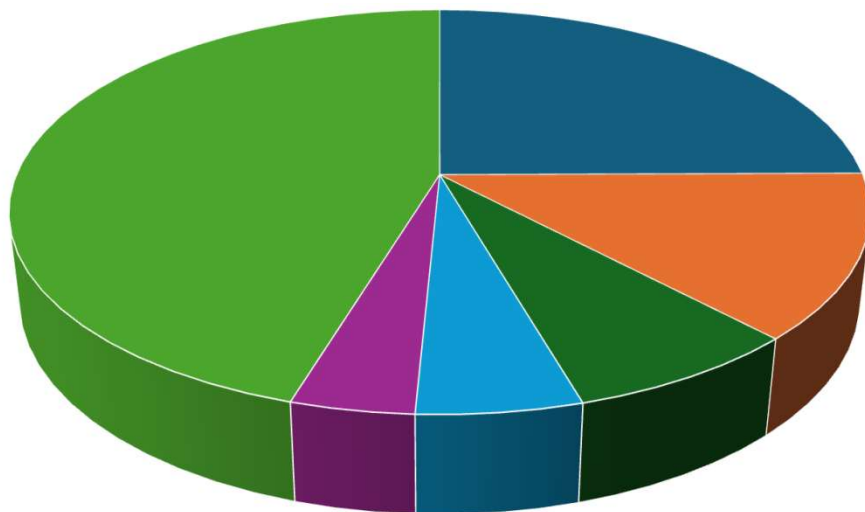


GEBOEKT YTD

USA nog grootste feeder, sinds eind maart lichte daling

- USA
- UK
- Duitsland
- Canada
- Nederland
- Overig

	Delta	ADR \$	LoS	BW
USA	1%	274	2.5	56
UK	-6%	191	2.3	46
Duitsland	12%	169	2.2	39
Canada	18%	222	2.6	71
Nederland	-19%	191	1.7	29
Totaal	3%	218	2.4	45



YTD GEBOEKT, AANTAL KERNGETALLEN

Pakketaandeel stijgt, bovengemiddelde groei VIP Access



Package: 33%
(+13%)



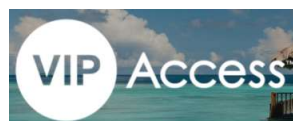
Mobile: 30%
(+12%)



Corporate: 2%
(-9%)



Distributie rates: 5%
(+120%)



VIP: 10%
(+22%)

Betaal nu de totaalprijs

- Je kunt je Expedia-punten gebruiken
- We verwerken je betaling in je lokale valuta
- Andere betalingsmethoden: betaalpas/creditcard of PayPal
- Je kunt een geldige coupon van Expedia gebruiken

Expedia Collect
(+/- 90% aandeel)

Agenda

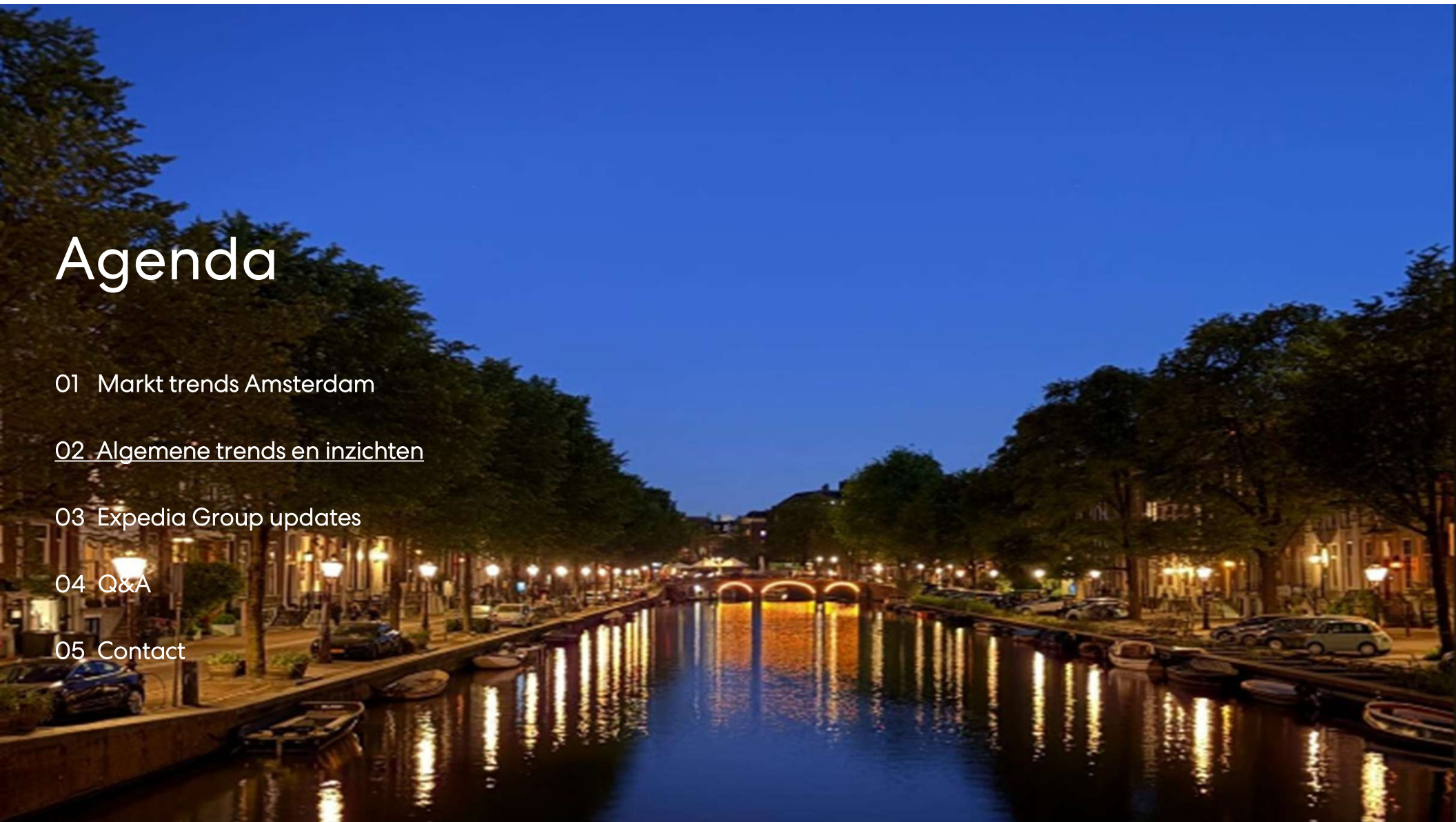
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Scan QRs voor rapportdownloads



2025 Traveler Value Index



Unpack 25; The Trends in Travel



Path to Purchase



Q2 Traveler Insights

DE TRENDS IN REIZEN

Unpack '25



Detour Destinations

In 2025, travelers are not only taking the road well-traveled, they're also taking detours to experience new places. Detour Destinations are less well-known and less crowded than tourist hotspots, but these rising stars are well worth putting on an itinerary, either as an add-on or the main destination.

Expedia's list of Detour Destinations all experienced an increase in searches over the past year, and 63% of consumers say they are likely to visit a detour destination on their next trip*.



Lapland Region, Finland

The Phenomena-List

Recent eclipses sold out rural, private vacation homes in their path. That set off a wave of travelers going to great lengths to witness natural phenomena. Whether it's looking toward dark skies to stargaze or see the Northern Lights or heading to the beach to watch sea turtles hatch, travelers want a front-row seat to breathtaking natural wonders.



Goods Getaways

It's time to leave the keychains and fridge magnets at the gift shop. Travelers are going the distance in search of treasures they can't get at home and can't go home without. On TikTok, everything from a chocolate bar from Dubai, skincare products from Korea, candy from Japan, and butter from France have gone viral. Gen Z can't wait to get their hands on these specialty goods.

2025 Set-Jetting Forecast

Expedia spotted Set-Jetting as an emerging travel behavior in 2023, and entertainment on screen is still growing as a source of travel inspiration. Two-thirds of travelers shared that movies, streaming services and TV shows have influenced their travel choices, and 36% say TV and films are more influential on their travel plans than they were last year*.

In 2025, it's time for *Emily in Paris* to move over — *The Real Housewives of Dubai* are the new travel tastemakers. According to Expedia data, interest in Dubai increased more than 30% year-over-year after the series aired**.

In addition to heading to Set-Jetting destinations, travelers are exploring famous filming locations of their favorite TV and film franchises. The U.K. remains a leading Set-Jetting stop with hundreds of *Bridgerton*, *Harry Potter*, *Game of Thrones*, and *Outlander*-themed tours available to book on Expedia***.

**Based on Expedia travel data between June 1 – Sept. 3, 2023 vs. June 1 – Sept. 3, 2022

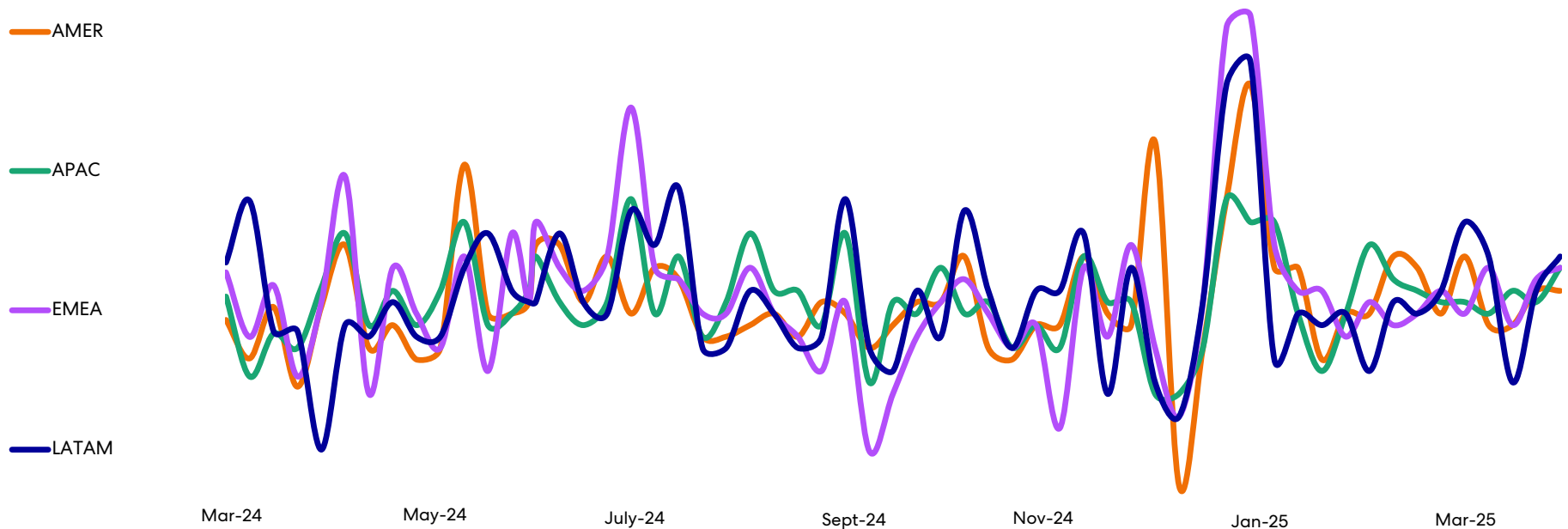
***Based on Expedia activities data between Jan. 1 – Aug. 6, 2024



Mexico City, Mexico

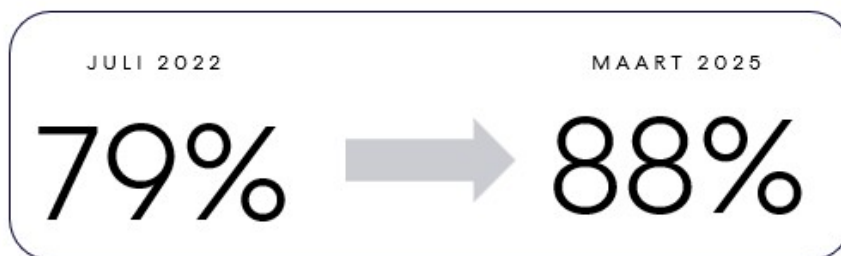
In Q1 20% groei in QoQ zoekopdrachten (ook YoY groei)

Zoekvraag EMEA stijgt met 40%, Canada naar Nederland +30%. Amsterdam op nr 7.



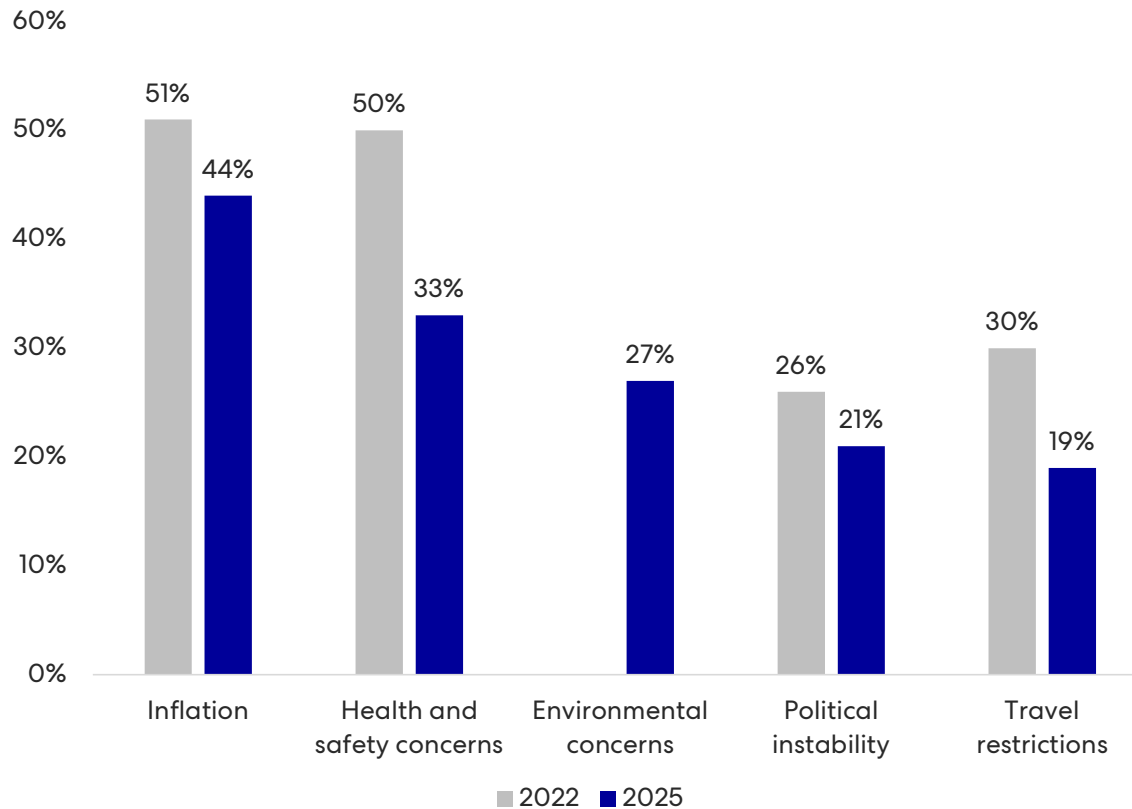
Helpt vindt reizen belangrijker dan vijf jaar geleden

Bijna 90% van de consumenten plant een reis in de komende 12 maanden – bijna 70% gaat boeken of heeft al geboekt



2025 TRAVELER VALUE INDEX

Inflatie is de grootste zorg die reizen beïnvloedt in 2025



58%

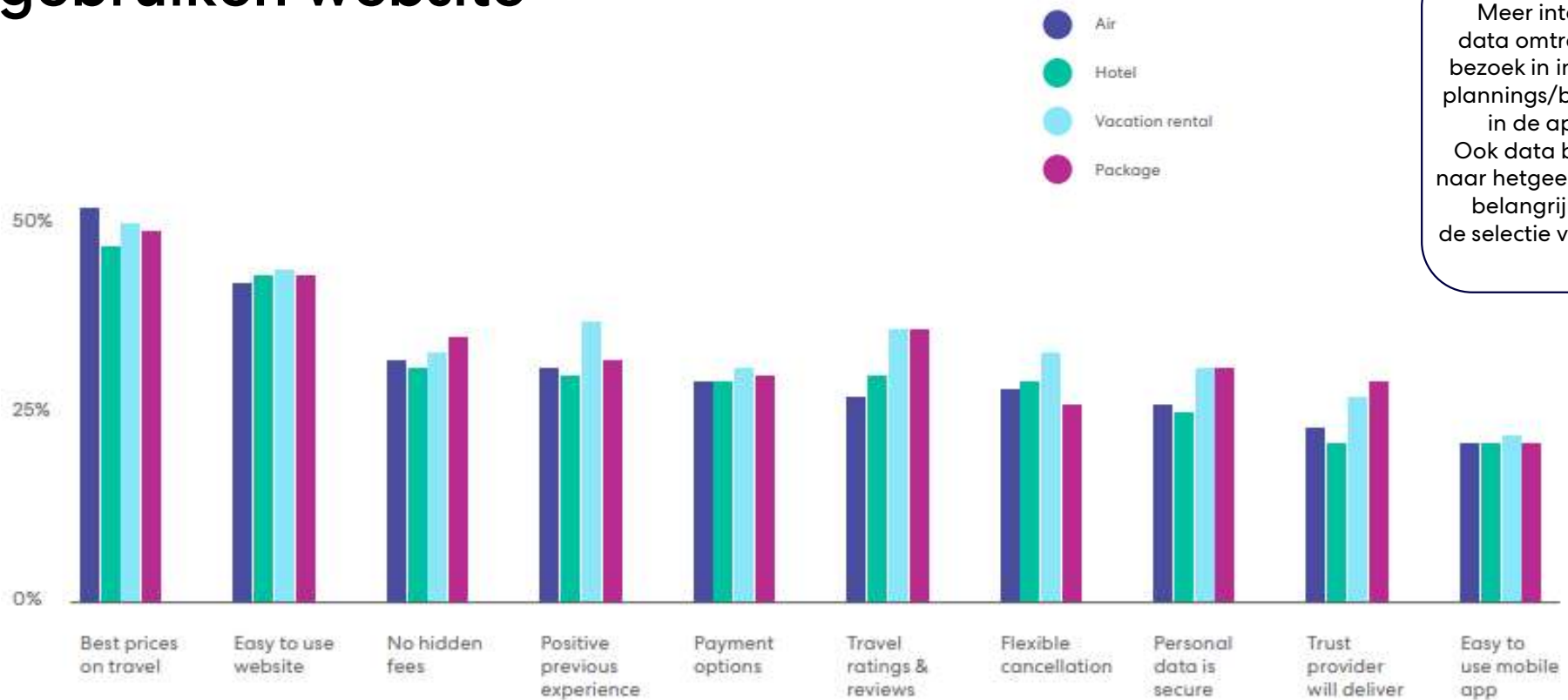
IN THE NEXT 12 MONTHS
of consumers anticipate
being more price
conscious

Source: Expedia Group, 2025 Traveler Value Index

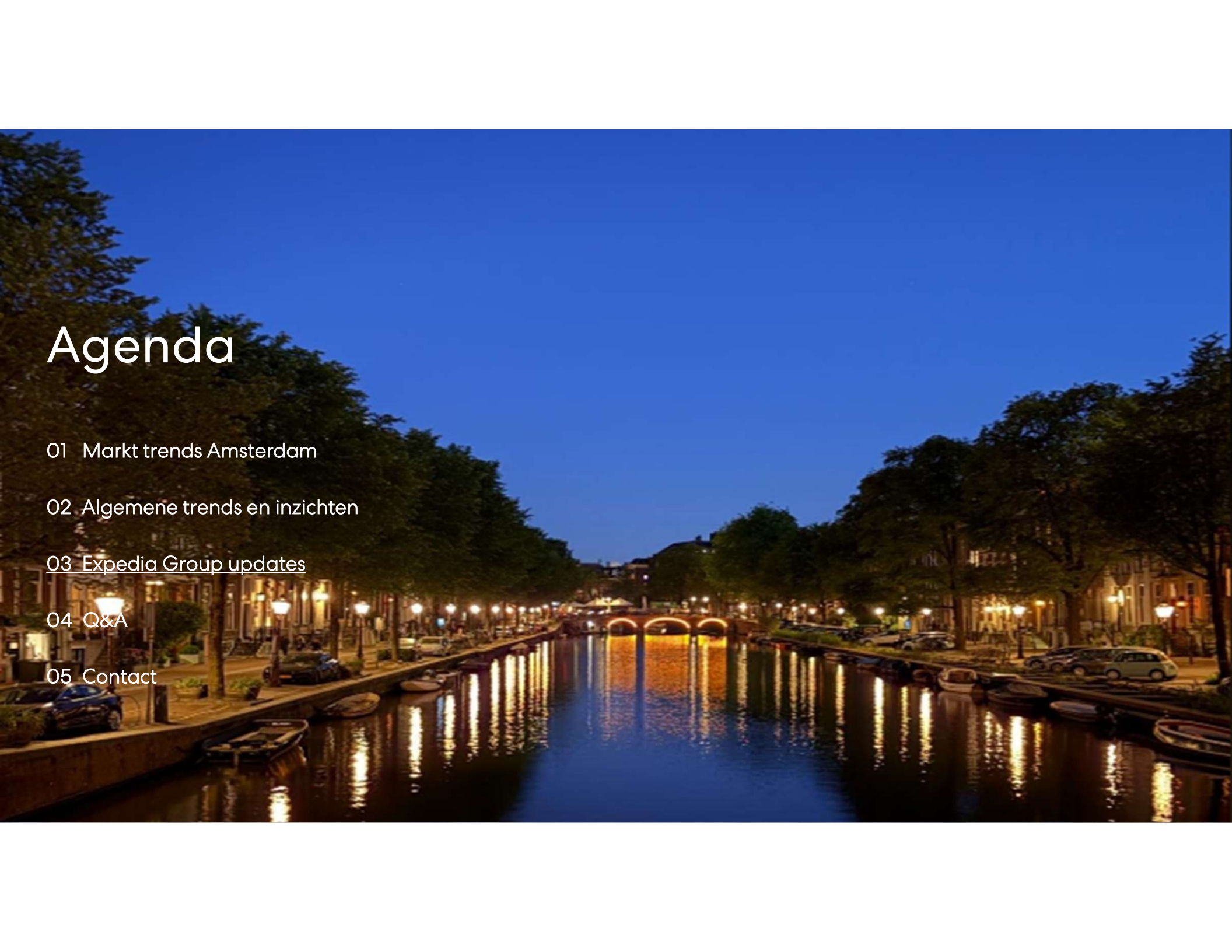
*Note that environmental concerns was a new addition to the 2025 survey

PATH TO PURCHASE

Prijs dominante factor, gevolgd door makkelijk te gebruiken website



Meer interessante data omtrent website bezoek in inspiratie- en plannings/boekingsfase in de appendix. Ook data beschikbaar naar hetgeen een reiziger belangrijk vindt bij de selectie van een hotel.



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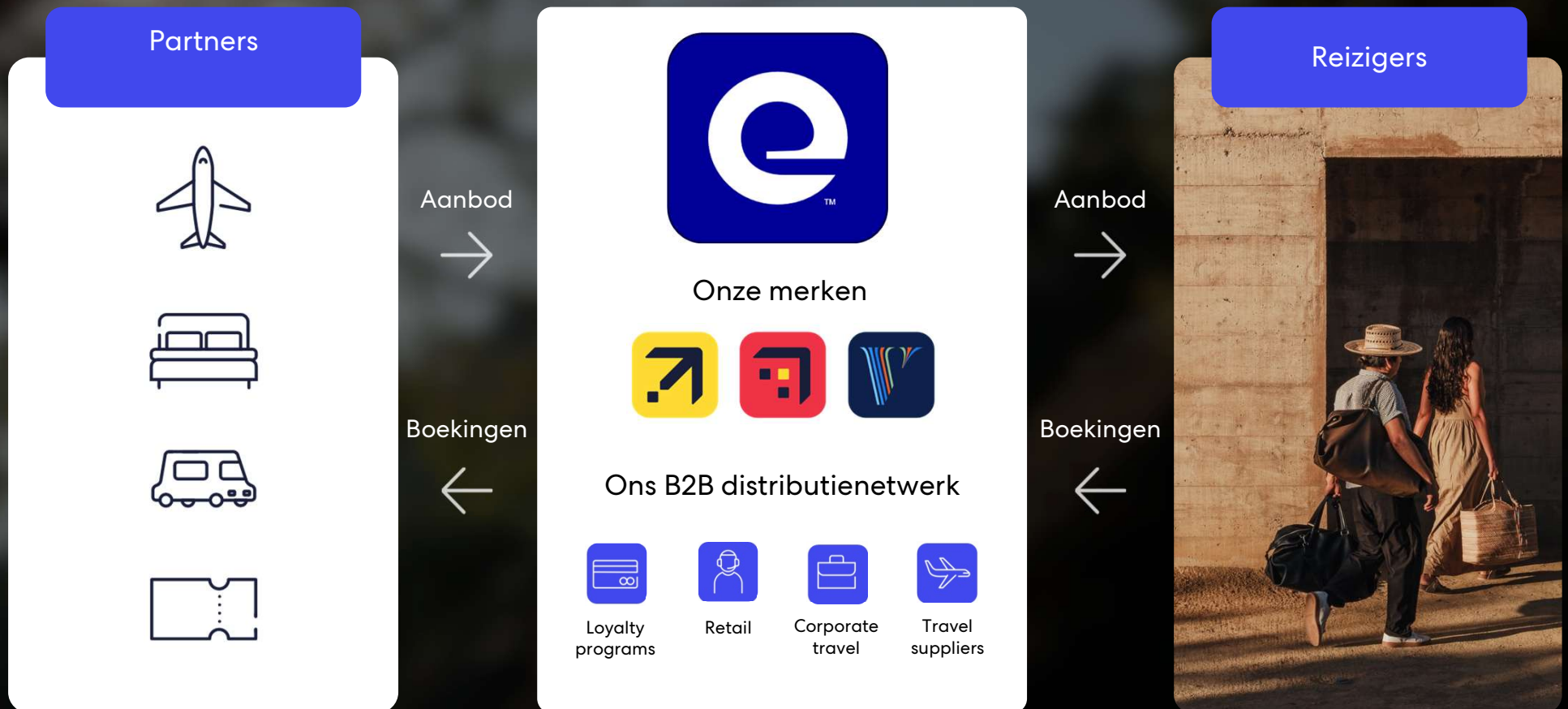
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Eén marktplaats, eindeloze mogelijkheden



Eén marktplaats, eindeloze mogelijkheden

Partners



Breeze Airways Flights Now Available on Expedia Group Booking Platforms



SEATTLE, 26 FEBRUARY 2025

Expedia Group and Southwest Airlines Announce Partnership



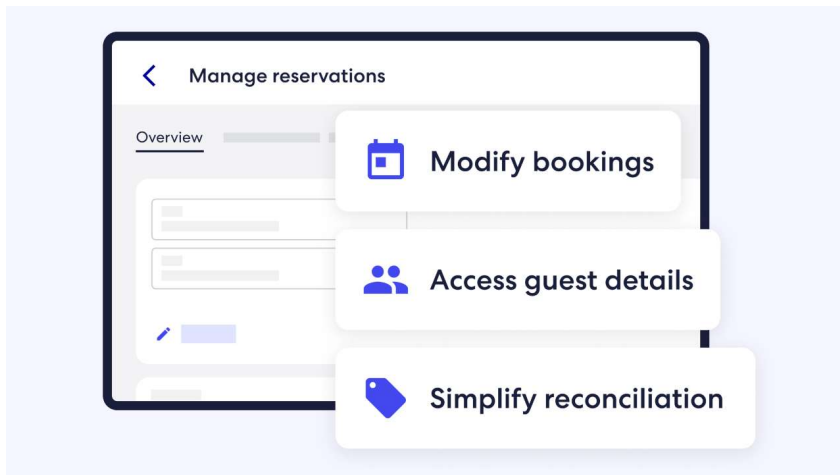
SEATTLE, 14 APRIL 2025

Ryanair Now Available on Expedia Group in US and Europe

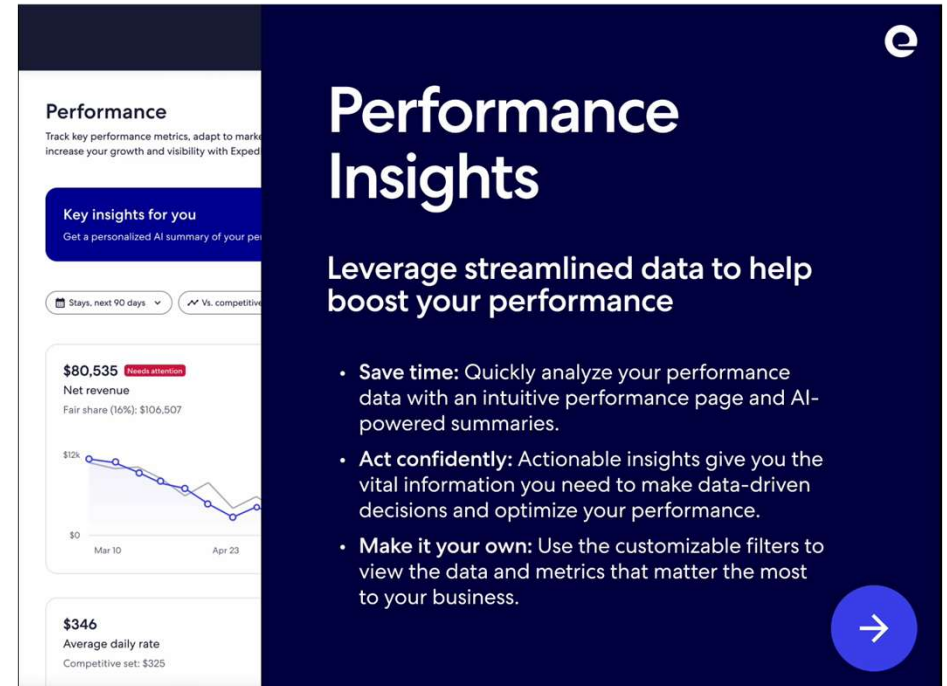
RECENTE UPDATES

Belangrijke nieuwtjes voor partners

Reservation management API



Partner Central insights / Machine Learning - AI



RECENTE UPDATES

Belangrijke nieuwtjes voor partners

Vergroot het distributiebereik middels

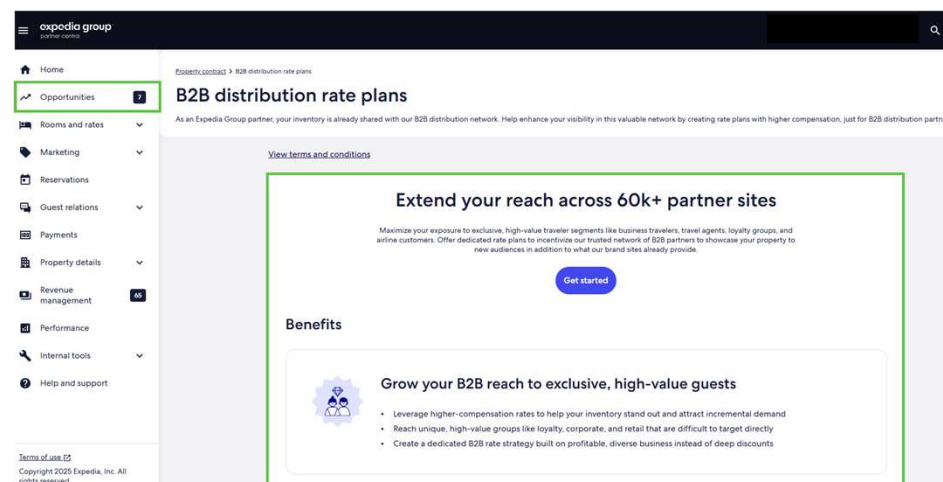


Sluit je aan bij grote merken

Onder andere deze partners maken reeds gebruik van de Optimized Distributie prijsplannen.



B2B distributie prijsplannen



B2B Partners - uitbreiding van de APIs:

- Car
- Air
- Activities
- Insurance

RECENTE UPDATES

Belangrijke nieuwtjes voor partners

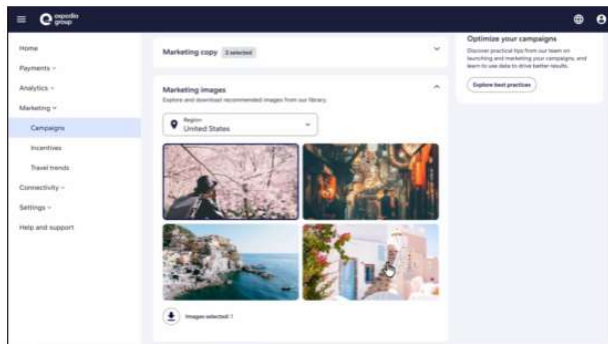
Expedia Group Advertising innovaties

“Expedia Group and Netflix announce first global advertising partnership”

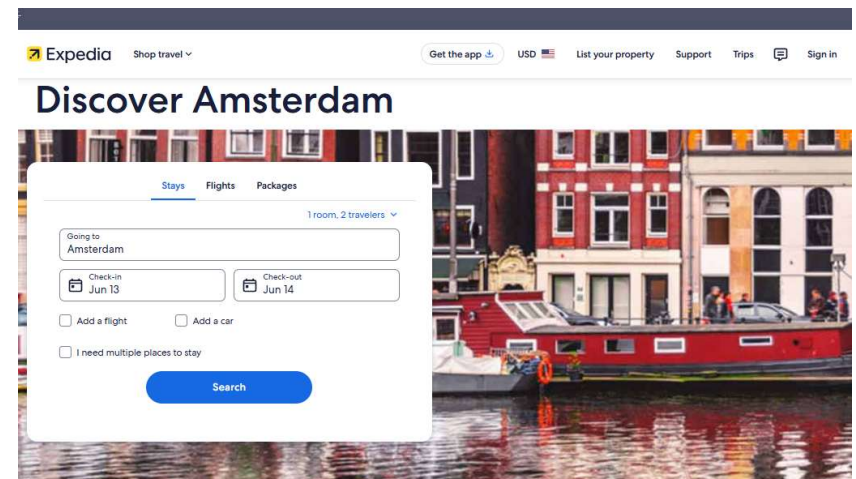
Lodging Sponsored Listings APIs (Beta versie to be released soon)

Merchandising Solutions (Coming Soon in Beta)

This new marketing section of the Portal enables partners to strategize, plan, execute, and track merchandising campaigns. We will also offer new Merchandising API endpoints for partners to build user interface experiences that promote Expedia-sourced deals and discounts to their travelers.



Expedia Group Advertising mogelijkheden: COOPs



Eén marktplaats, eindeloze mogelijkheden; merk revamps



Onze merken



Ons B2B distributienetwerk



Loyalty
programs



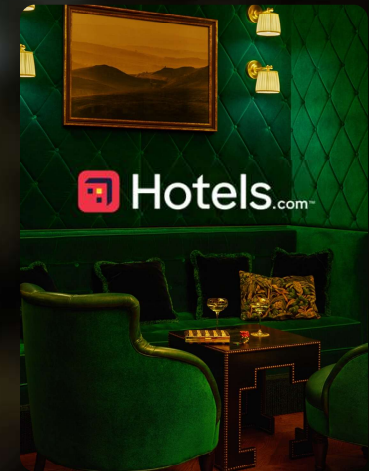
Retail



Corporate
travel

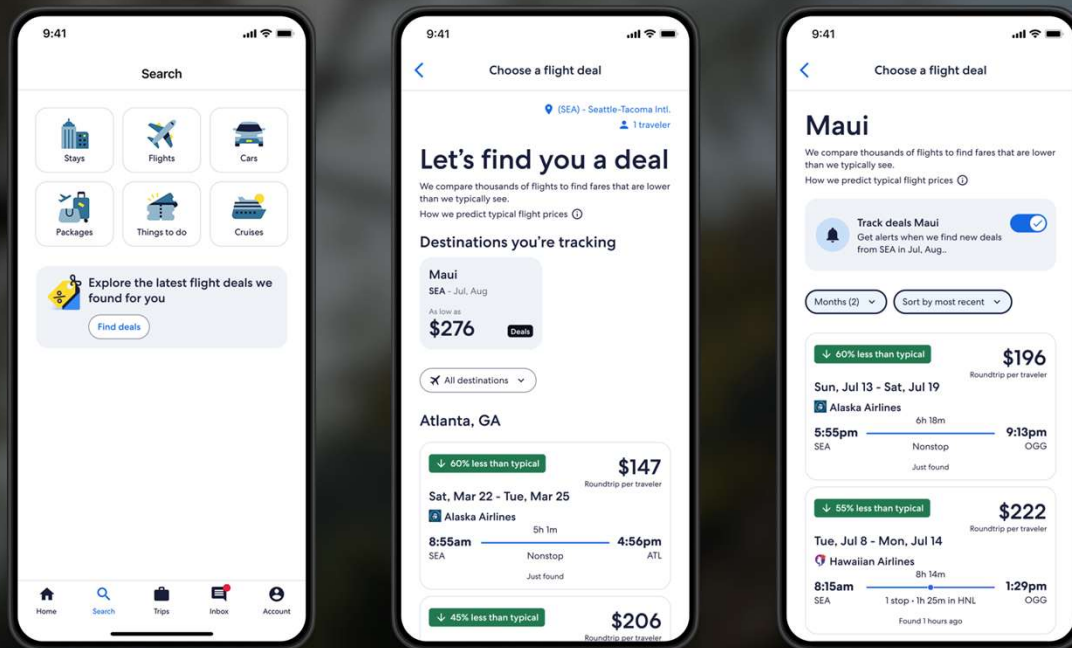


Travel
suppliers



Eén marktplaats, eindeloze mogelijkheden

Nieuw: flight deals feature



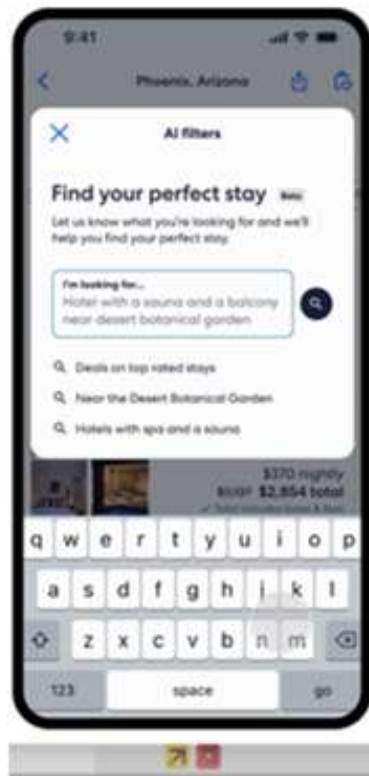
Reizigers



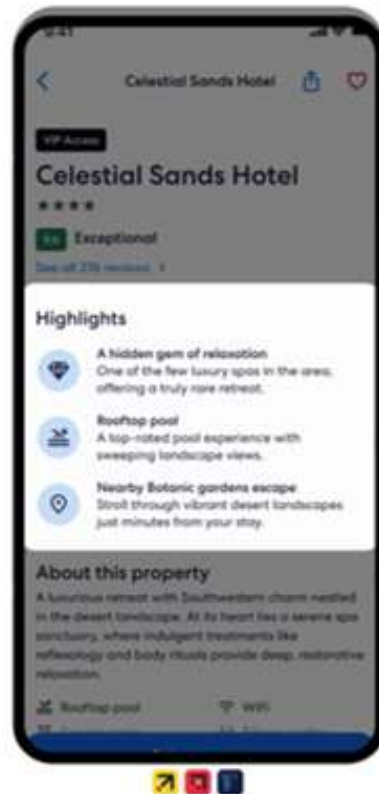
VOORBEELDEN VAN RECENTE AI ONTWIKKELINGEN

Sommigen reeds live, anderen in beta testing

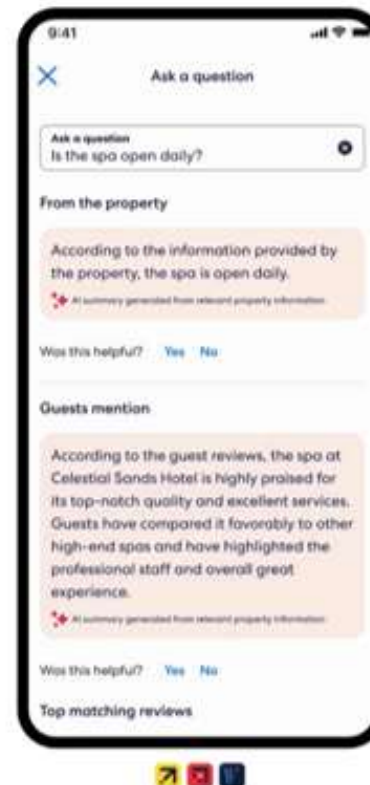
AI filters



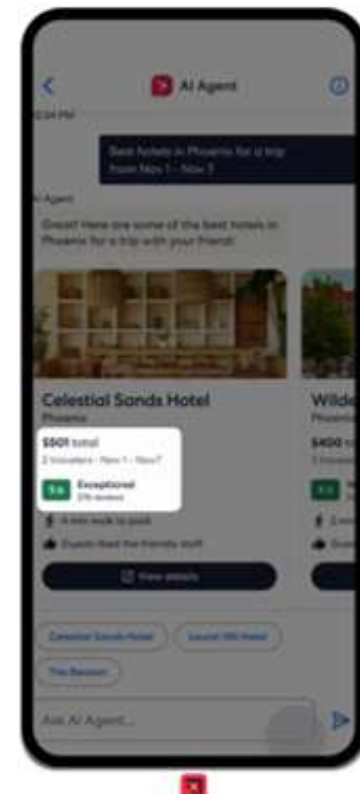
Property highlights



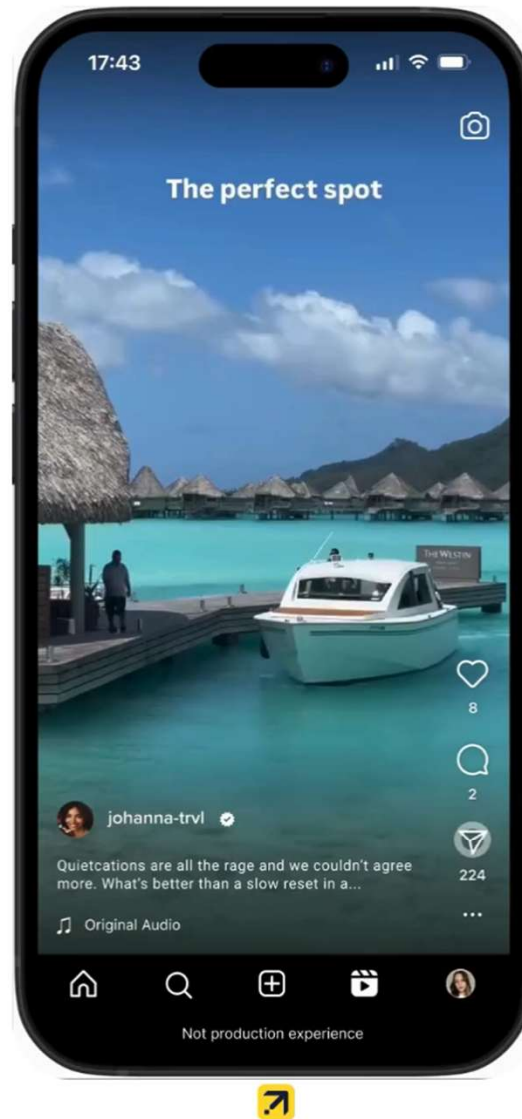
Property Q&A

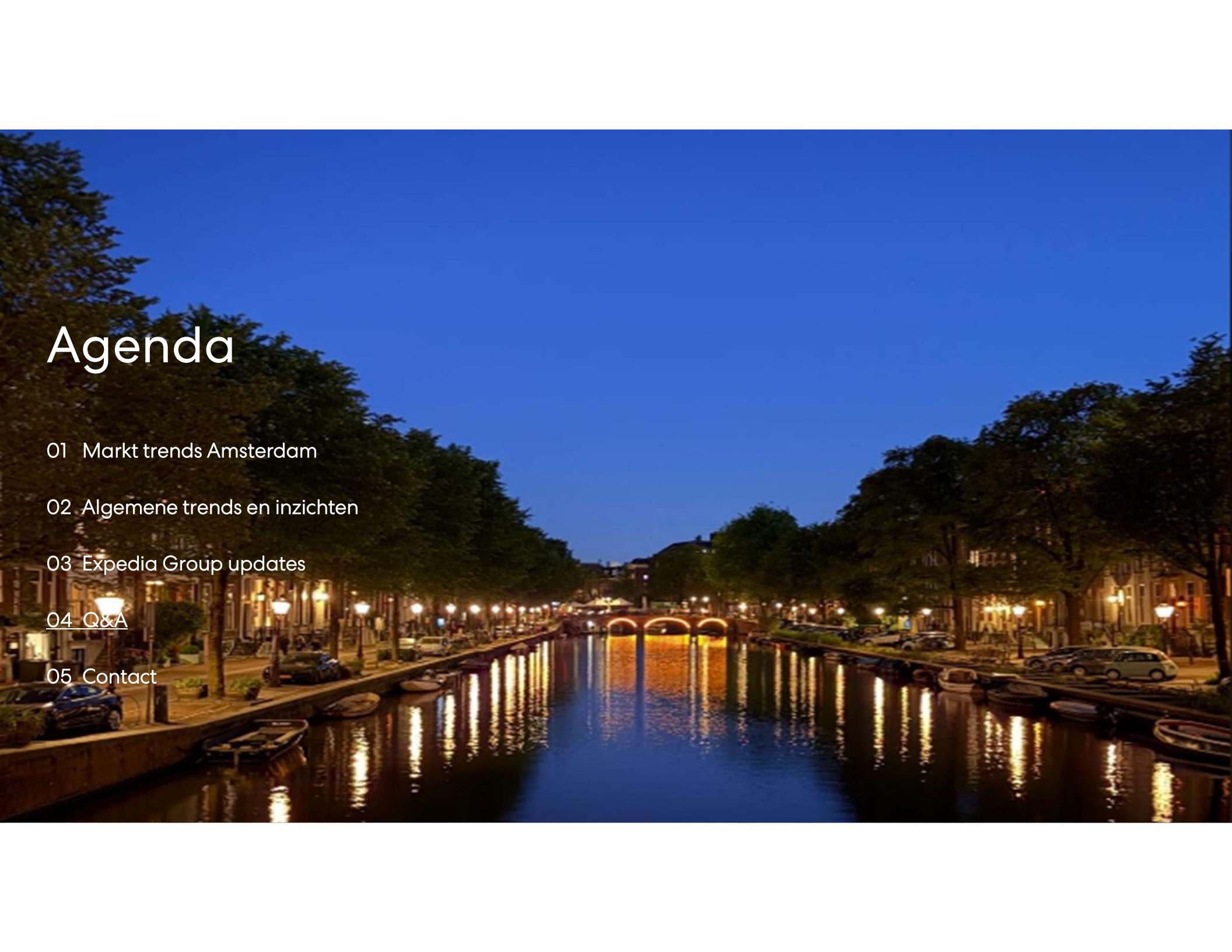


AI Agent



Trip Matching





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Welke vragen zijn er?



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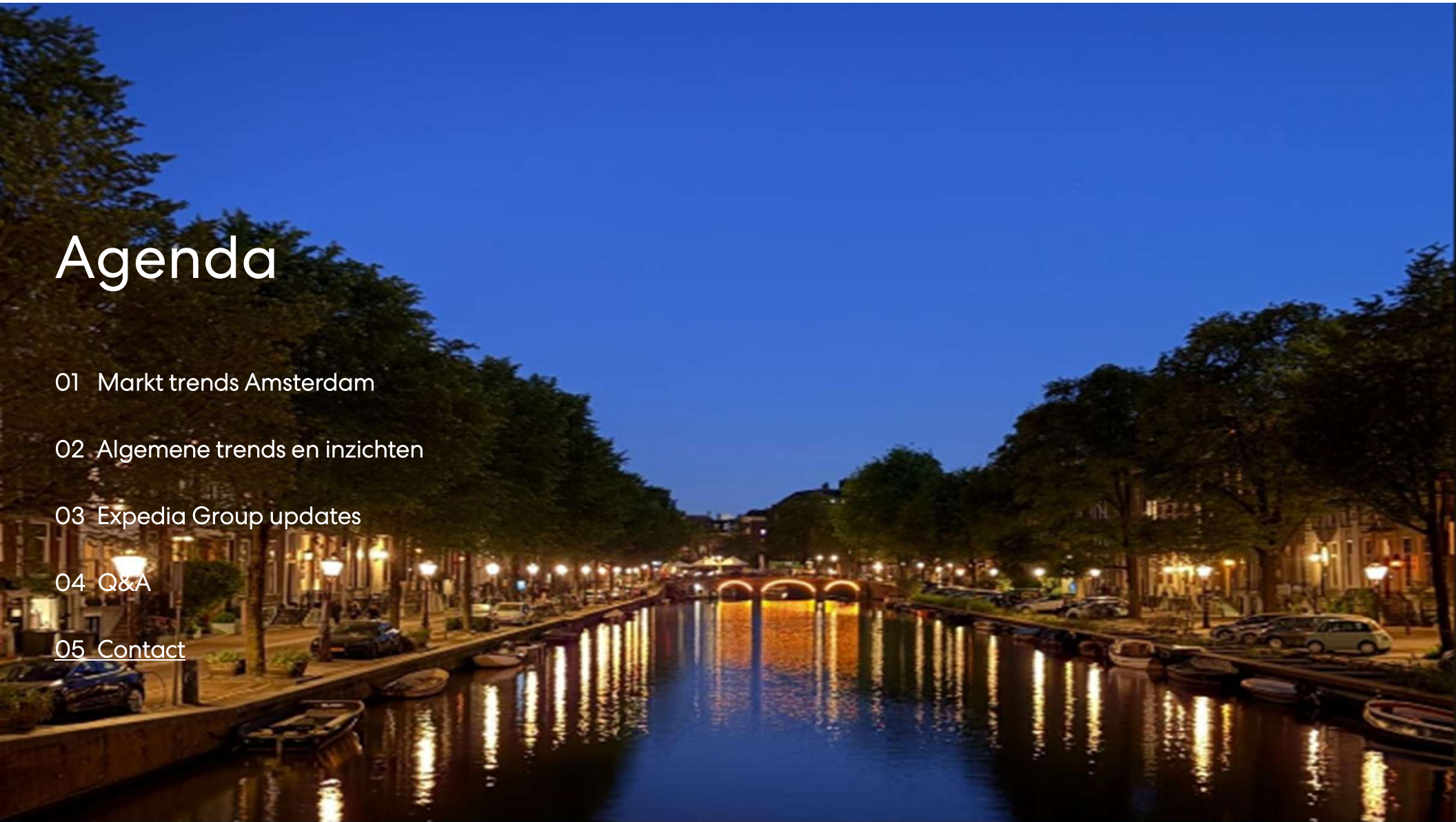
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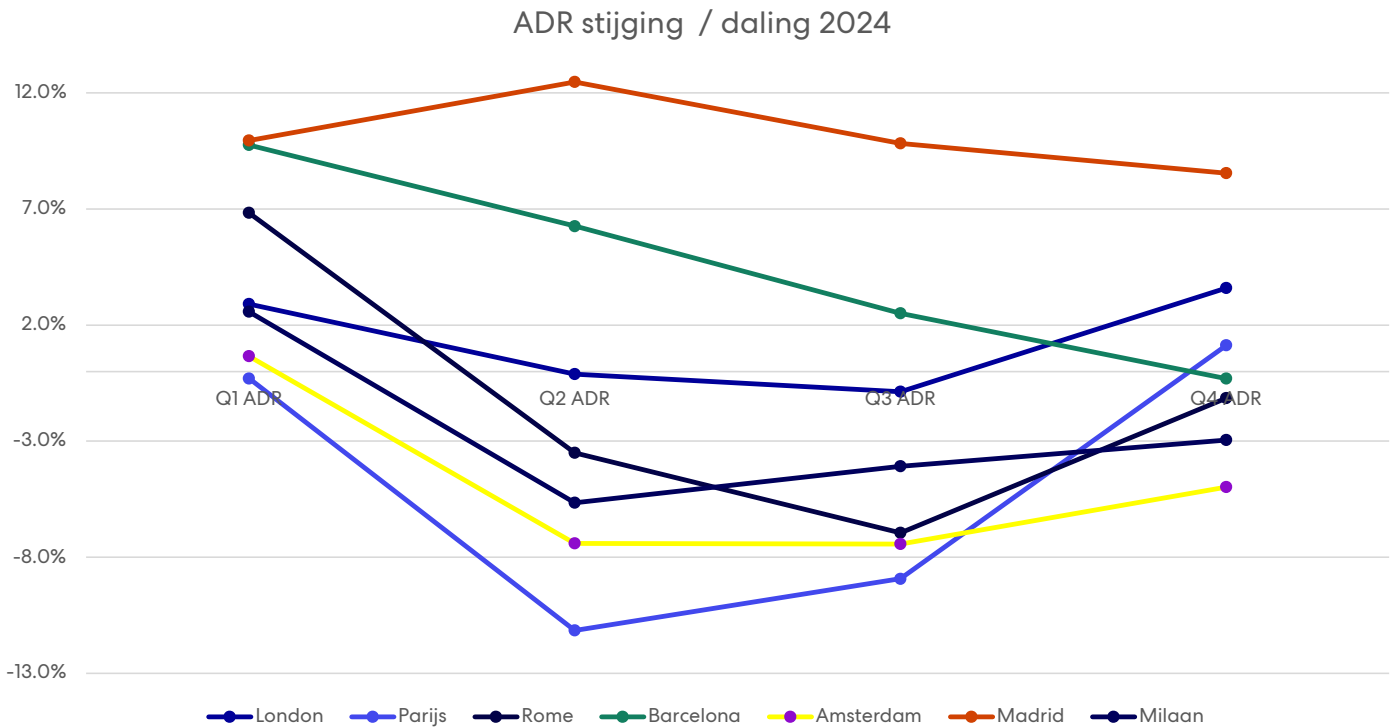


Appendix

ADR DAALT IN 2025 VERDER DOOR, INZICHT ADR ONTWIKKELING 2024 DIVERSE EUROPESE STEDEN

In 2024: Amsterdam grotere daling dan andere steden

Muv Parijs



AMSTERDAM EEN VAN DE BESTEMMINGEN DIE HET MEEST GEDAALD IS IN ADR

Hotel Price Index hotels.com



YTD BOOKED

Hoog aandeel international – metrics erg aantrekkelijk

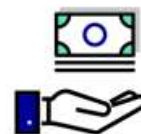
Muv annuleringspercentage, verklaarbaar door veel kortere booking window



Average Length of
Stay



Average Booking
window



Average Daily
Rate



Average Cancel
Rate



Share of Total
Room Nights

International

2.4 days

45.9 days

\$219

27%

96.1%

Domestic

1.6 days

29.4 days

\$191

15%

3.8%

GEBOEKT YTD, VERBLIJVEN IN KOMENDE 12 MAANDEN

> 31 dagen grootste aandeel, wel shift richting < 30 dagen

Gemiddeld 45.1
Booking Window

		0-1 day	2-6 days	7-13 days	14-20 days	21-30 days	31-60 days	61-90 days	91+ days	Total
Gemiddeld 2.4 Length of stay	1 day	3%	3%	2%	1%	1%	2%	1%	1%	14%
	2 days	2%	3%	3%	2%	2%	4%	2%	4%	23%
	3 days	1%	3%	3%	2%	3%	6%	4%	6%	27%
	4 days	1%	1%	1%	1%	2%	4%	2%	4%	16%
	5 days	0%	1%	1%	1%	1%	2%	1%	2%	8%
	6 days	0%	0%	0%	0%	0%	1%	1%	1%	4%
	7 days	0%	0%	0%	0%	0%	1%	1%	1%	3%
	8-14 days	0%	0%	0%	0%	0%	1%	1%	1%	4%
	15-30 days	0%	0%	0%	0%	0%	0%	0%	0%	1%
	Total	8%	12%	11%	9%	10%	20%	12%	19%	100%

L28D SEARCHES

Amsterdam bijna 20% gestegen in zoekvraag in L28D



Zoekopdrachten vanuit Canada fors gestegen

Amsterdam op plaats 7 in top searched bestemmingen voor EMEA reizigers

TRAVELER INSIGHTS | Q2 2025

Top searched destinations

*New top 10 searched destination

Top EMEA search increases from Canada:

- +30% to Ireland and the Netherlands
- +25% to Italy, France Spain and Portugal

For APAC travelers

- Tokyo, Japan
- Sydney, Australia
- Melbourne, Australia
- Seoul, South Korea
- Osaka, Japan
- Singapore
- Gold Coast, Australia
- Fukuoka, Japan
- Incheon, South Korea
- Taipei, Taiwan

For EMEA travelers

- London, England
- Paris, France
- Istanbul, Türkiye
- Dubai, UAE
- New York, New York
- Rome, Italy
- Amsterdam, Netherlands
- Barcelona, Spain*
- Lisbon, Portugal*
- Palma de Mallorca, Spain*

For LATAM travelers

- Mexico City, Mexico
- Cancun, Mexico
- Sao Paulo, Brazil
- Rio de Janeiro, Brazil
- Puerto Vallarta, Mexico
- Playa del Carmen, Mexico
- Madrid, Spain
- Paris, France*
- New York, New York
- Mazatlán, Mexico*

For NORAM travelers

- Cancun, Mexico
- Las Vegas, Nevada
- Orlando, Florida
- Punta Cana, Dominican Republic
- Miami, Florida
- Los Angeles, California
- Chicago, Illinois
- New York, New York
- Fort Lauderdale, Florida
- Boston, Massachusetts

EMEA zag sterkste groei – aandeel 91-180 aanzienlijk gegroeid

EMEA had the
strongest growth

40%

increase in EMEA search volume
quarter-over-quarter in Q1

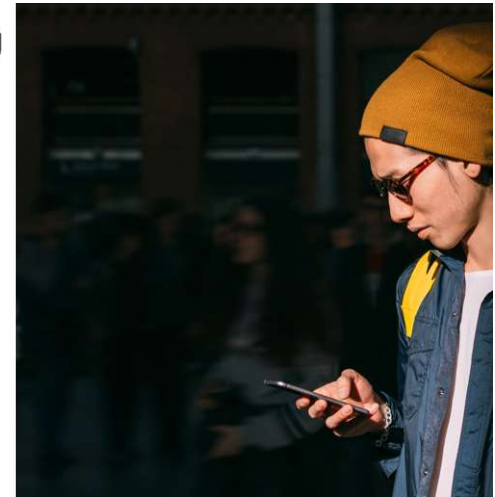


Travelers planning
further ahead

NEARLY

50%

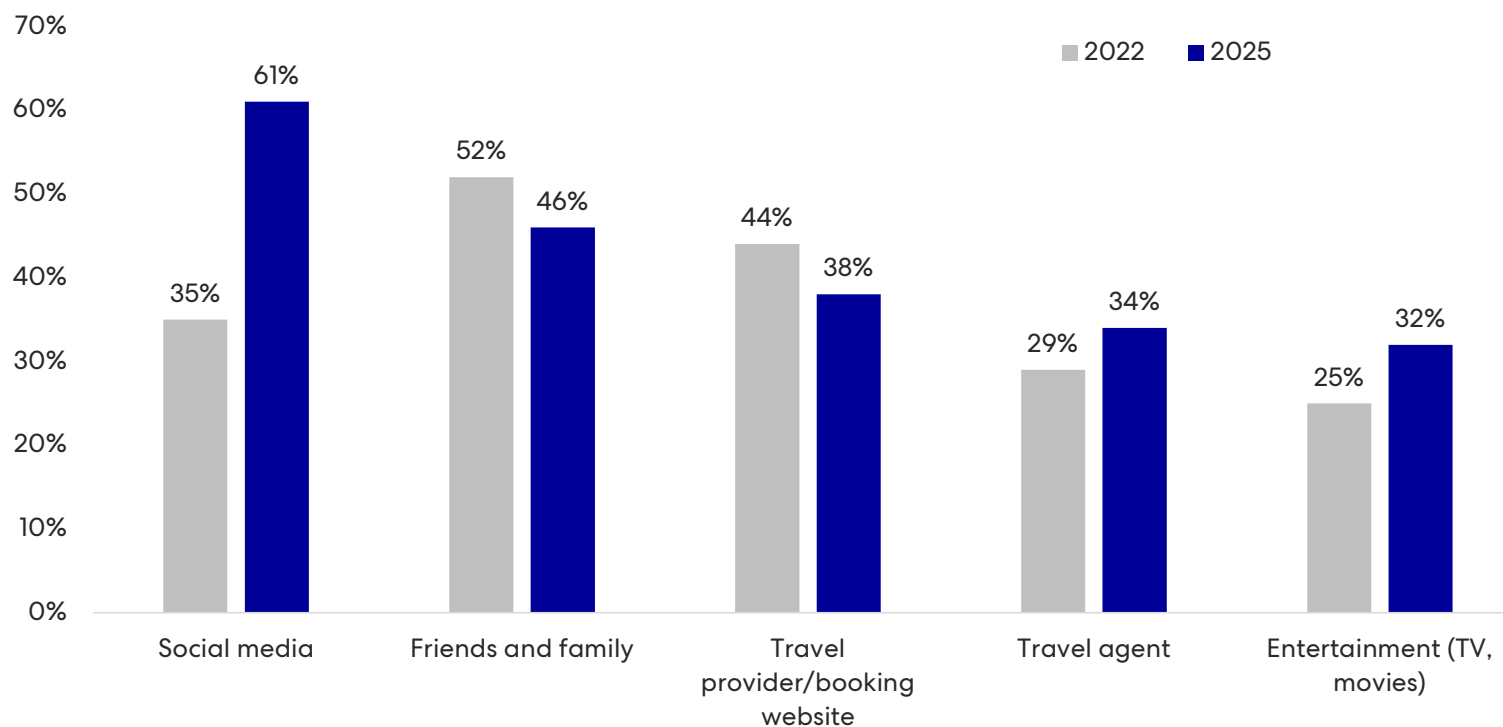
increase in the 91-180-day search
window quarter-over-quarter



2025 TRAVELER VALUE INDEX

Social media belangrijkste inspiratiebron

Waarbij hotels het vaakst geboekt worden obv aanbeveling – tours op derde plek met 24% en vliegtickets met 23% op 5



73%

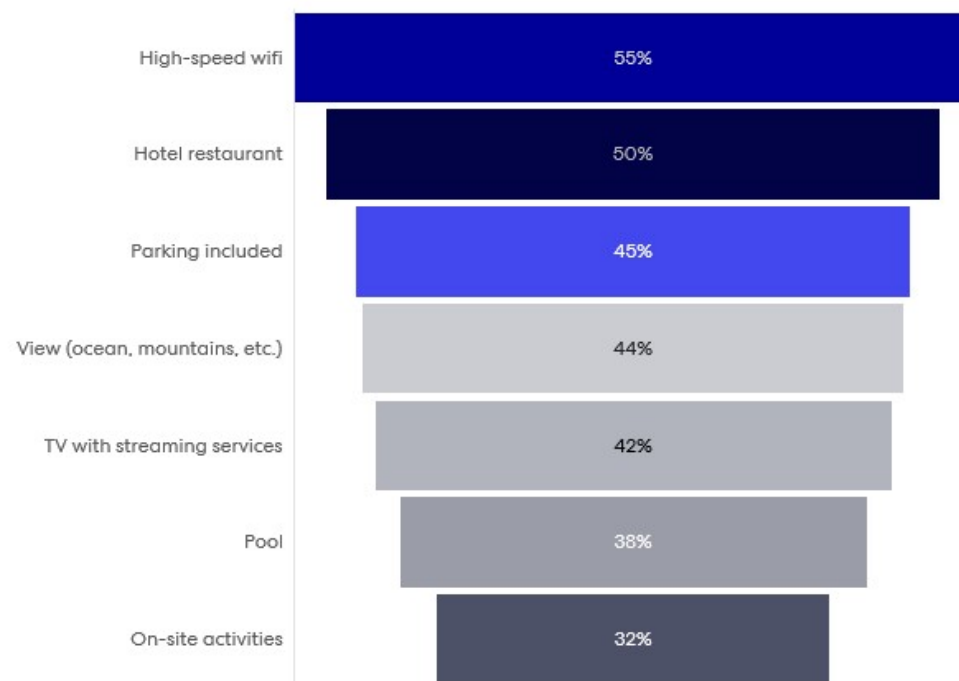
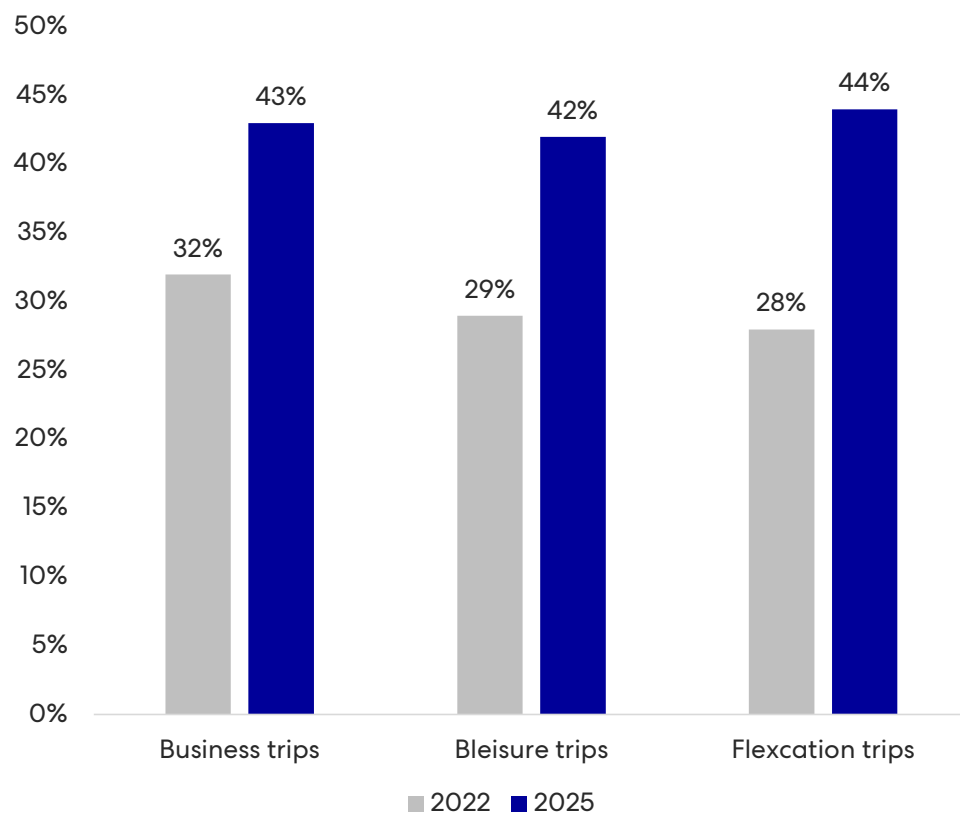
have had an influencer recommendation impact their decision to book a travel element or trip in the past

Source: Expedia Group, 2025 Traveler Value Index

*2025 social media data is a net of all social media options.

Consumenten mixen werk en vrije tijd

High speed wifi belangrijk – tv met streaming services op plek 5



PATH TO PURCHASE

Gemiddeld consumeert een reiziger 303 minuten aan reiscontent in de 45 dagen voorafgaand aan boeken



OTA's worden vaak bezocht voordat geboekt wordt



OTAs are used for cross shopping regardless of where purchase is made

The digital data shows that most travelers use OTAs in the path to purchase, regardless of where they book.

% visiting an OTA before **any travel purchase**



% visiting an OTA before **purchase on hotel site**



% visiting an OTA before **purchase on car rental site**



% visiting an OTA before **purchase on airline site**



PATH TO PURCHASE

Ruim eenderde bezoekt hotelwebsite in onderzoeksfase



Business models Expedia Group: HC, EC and ETP



