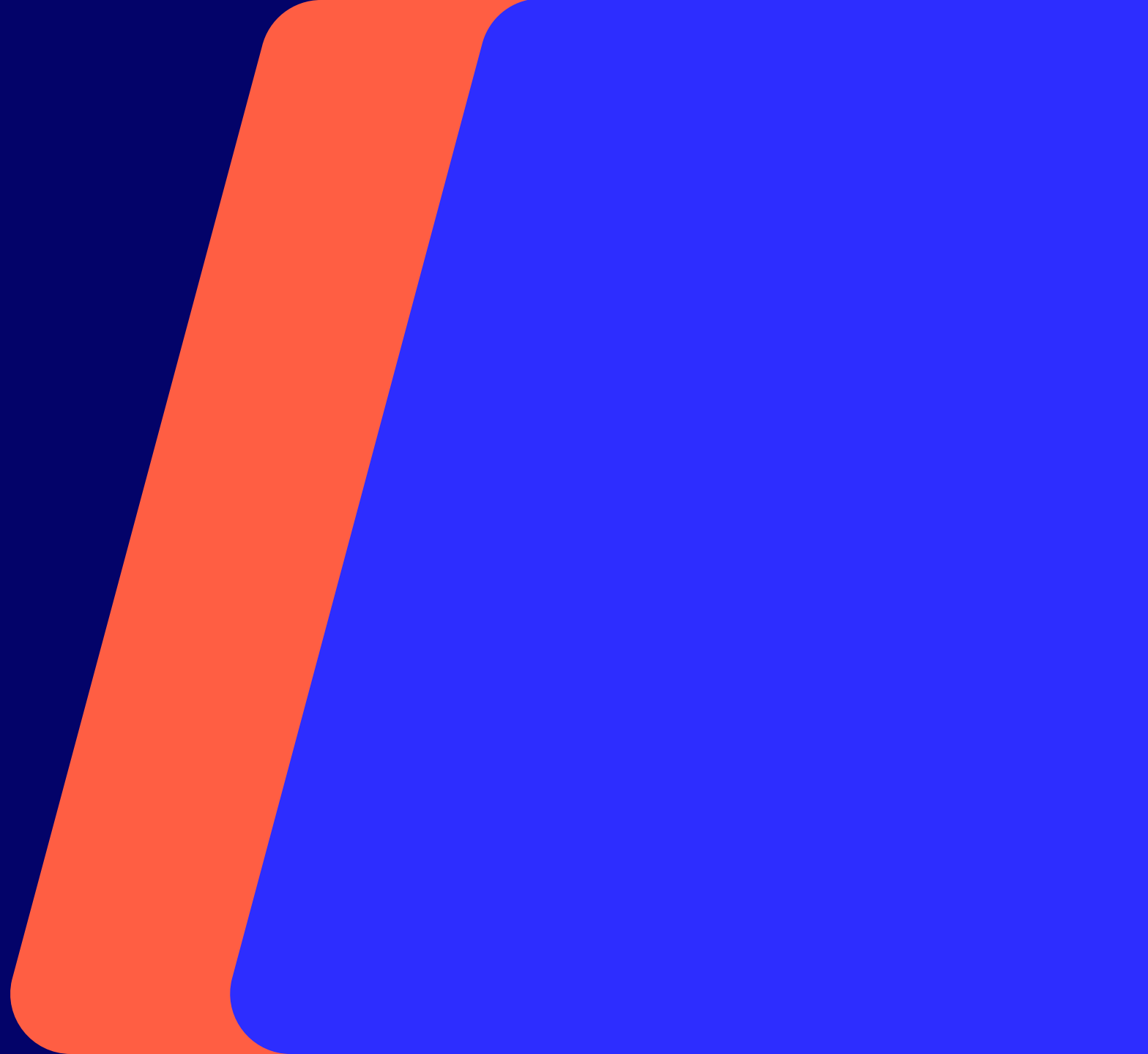


# Expedia Group

Barbara Akkermans



# Expedia Group

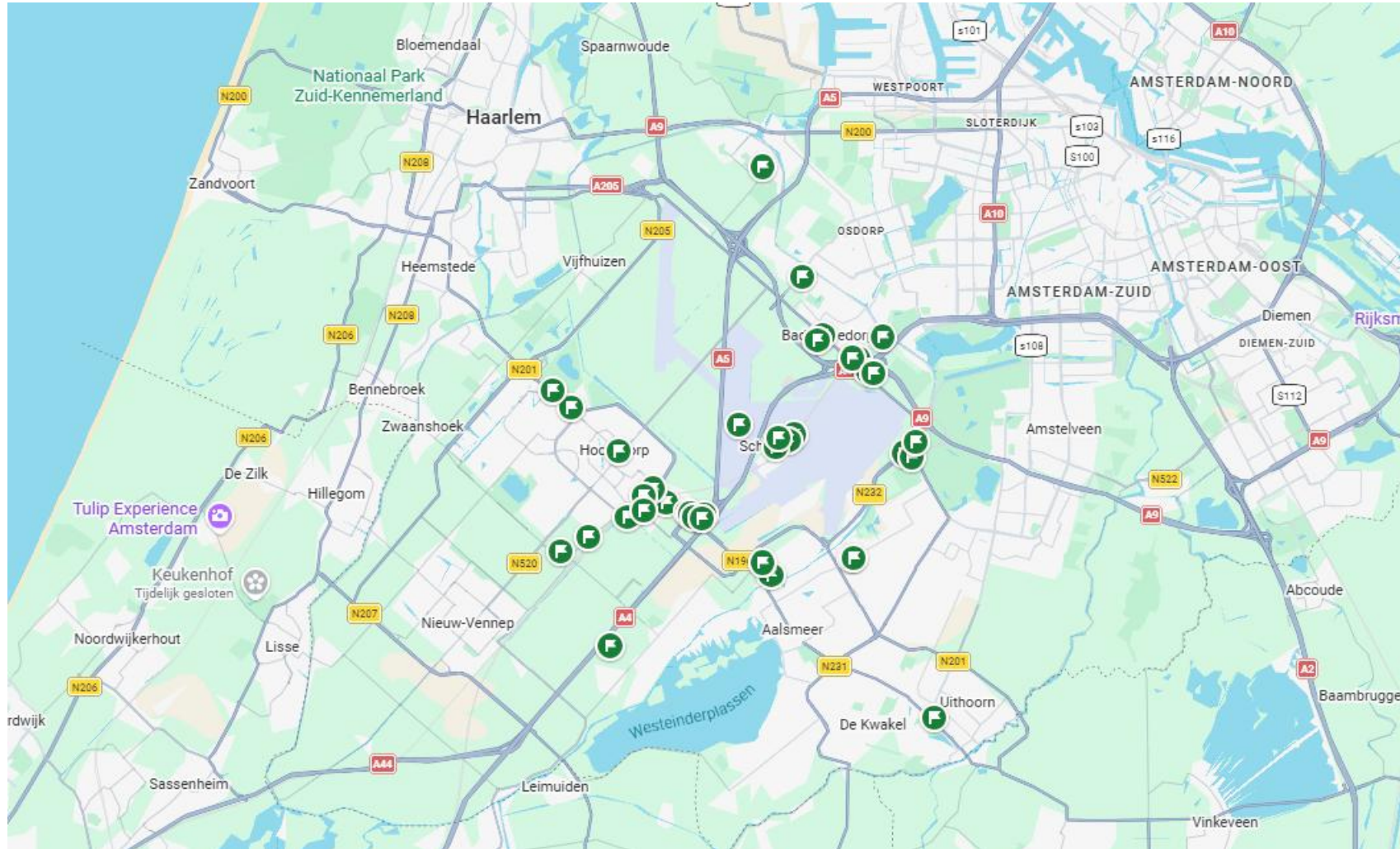


Barbara Akkermans  
Area Manager

# Agenda

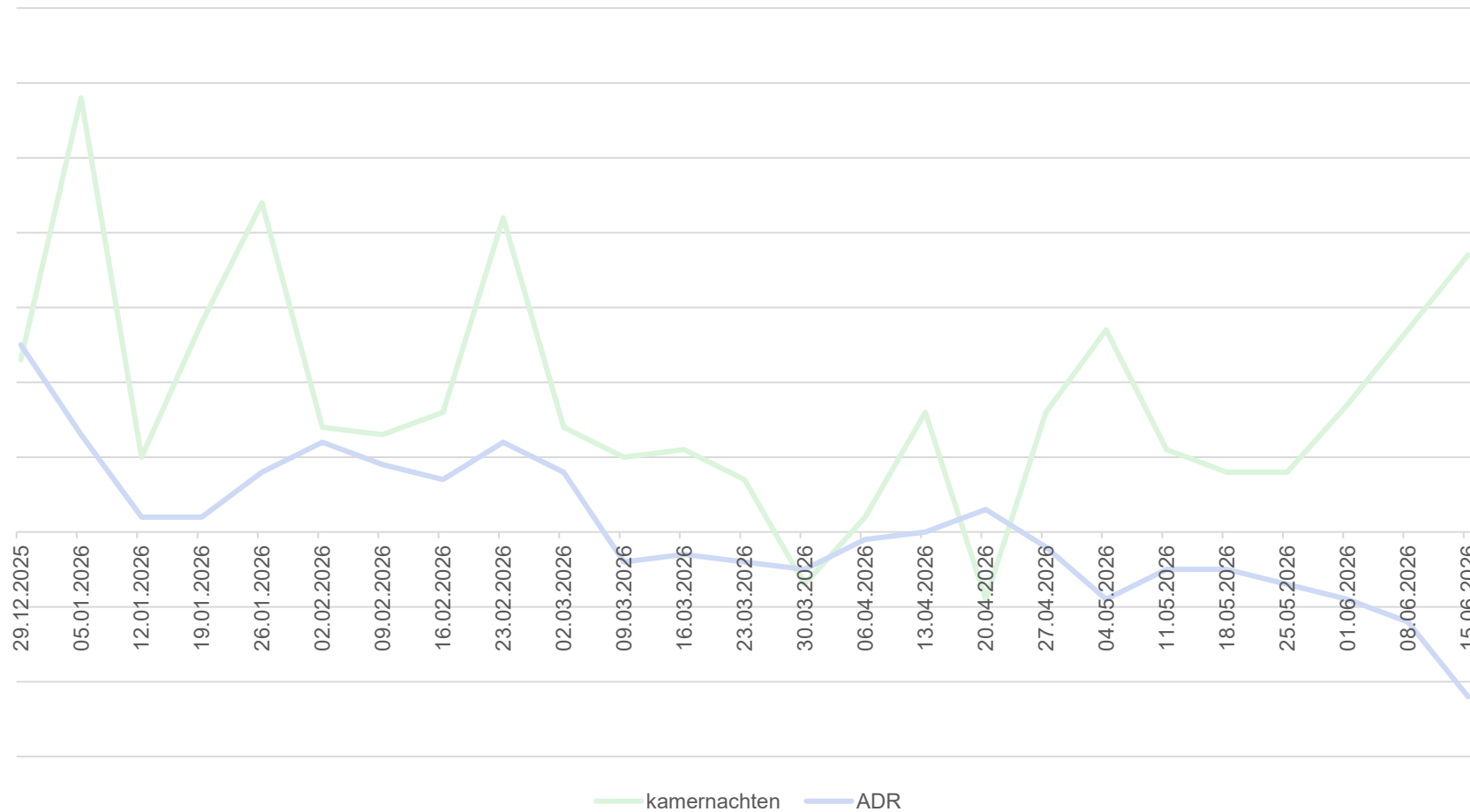
1. Markt trends
2. Algemene trends
3. Expedia Group updates
4. Take aways
5. Q&A

# Submarket Schiphol gedefinieerd



# Schiphol kamernachten overall behoorlijke groei

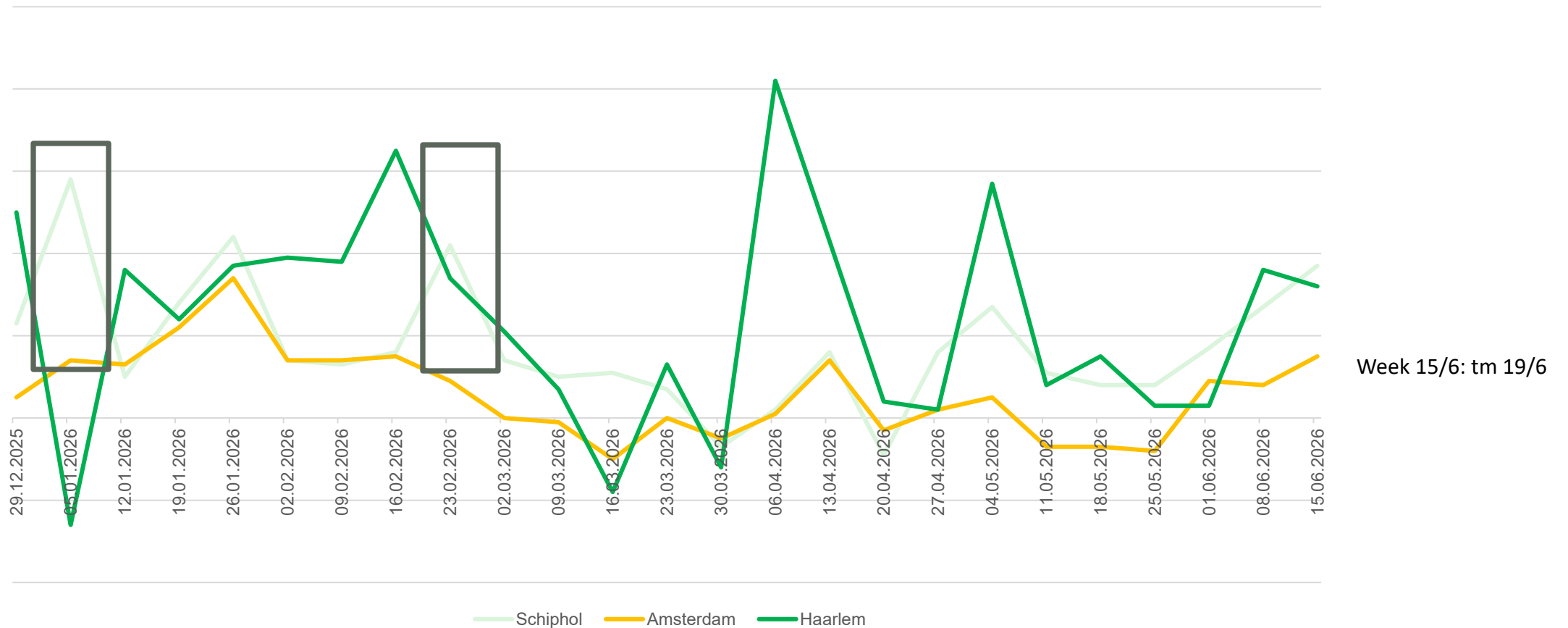
Vanaf start onrusten MO ADR onder druk



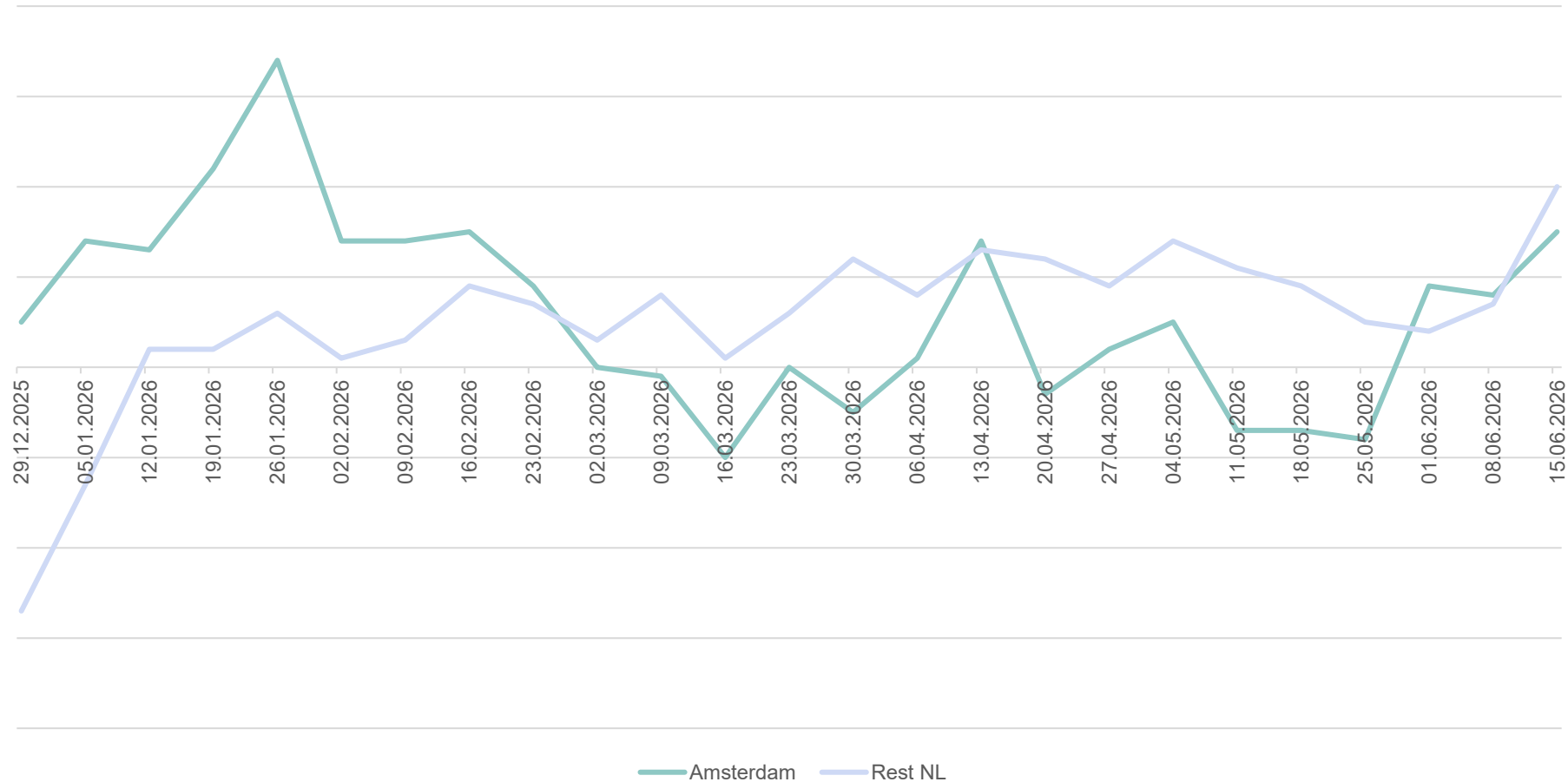
Week 15/6: tm 19/6

# Schiphol groeit sterker dan Amsterdam, volgt trend (muv winterweer)

Haarlem groeit harder (aantallen echter veel lager)

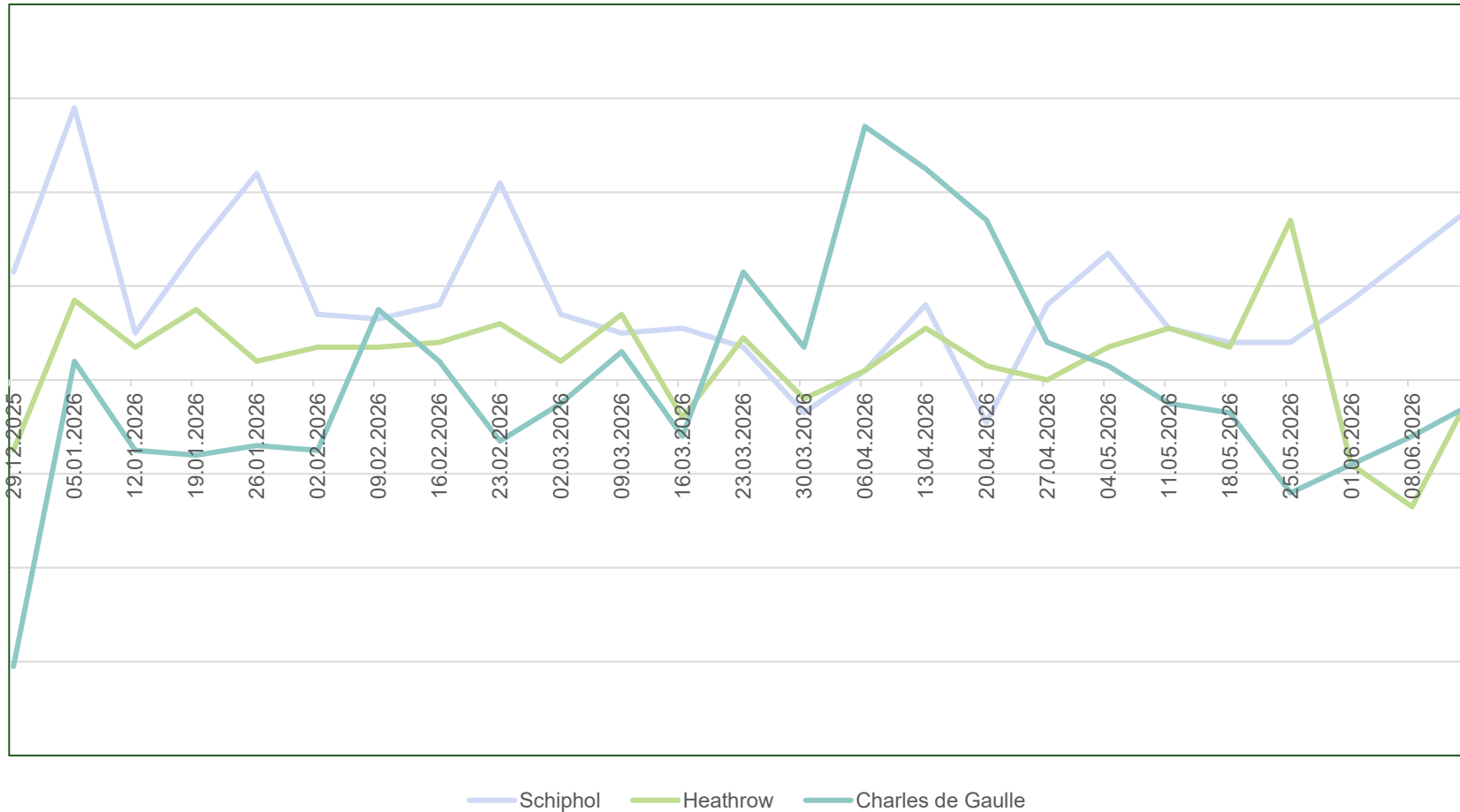


# Rest van Nederland vanaf mid januari stabiele groei



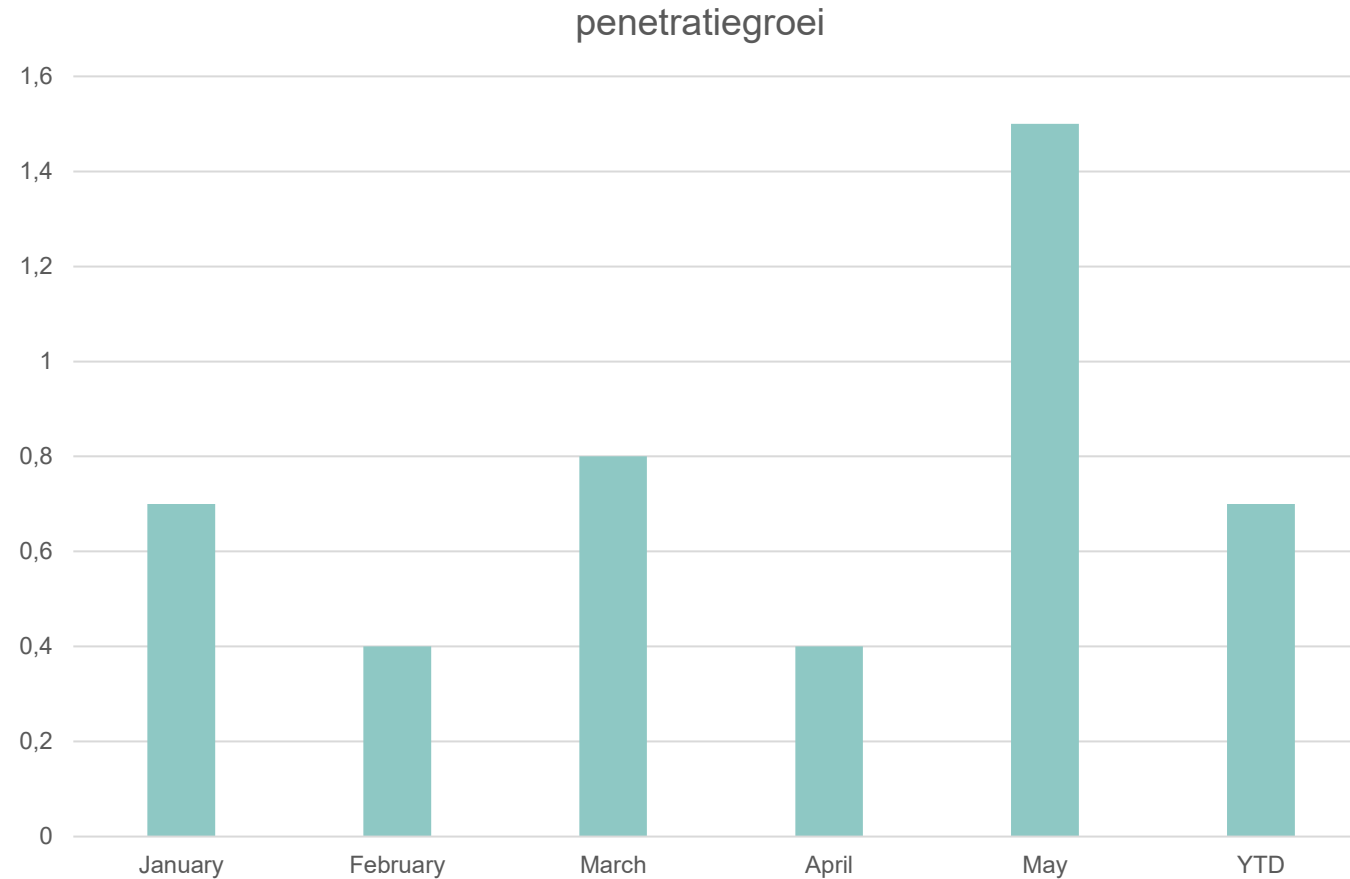
Week 15/6: tm 19/6

# Schiphol groeit sterker dan Heathrow en Charles de Gaulle



Week 15/6: tm 19/6

# Penetratie in regio Schiphol groeit stevig: in mei zelfs zo'n 20%



# Juni en September stevige ADR dalingen

(Kamernachten stijgen harder dan Amsterdam (+19% versus +4%) – echter ADR daalt (-4% versus +2%))

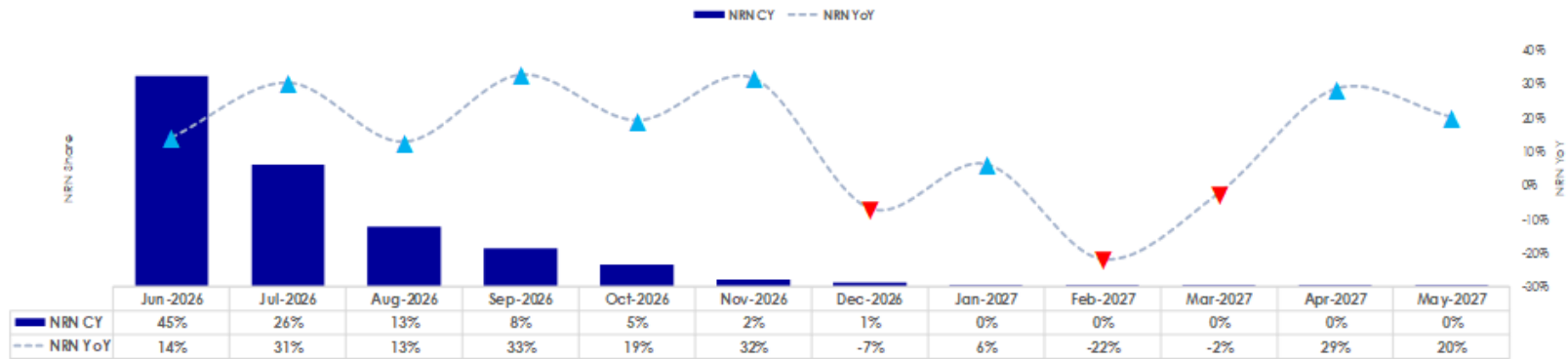
## Net Room Nights YOY

+19%

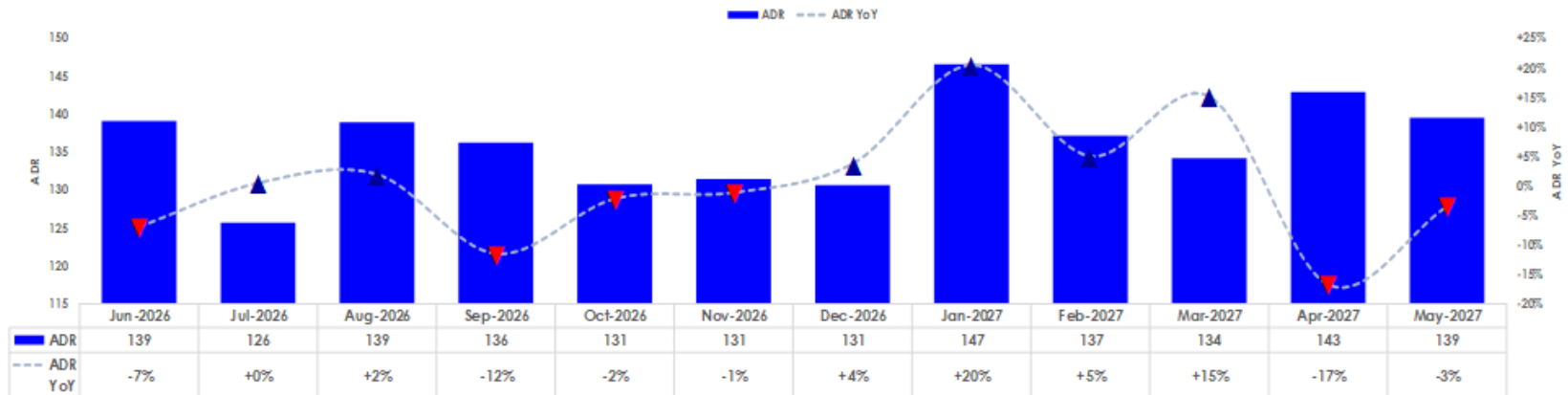
## ADR YOY

\$135 | -4% YoY

### Net Room Nights

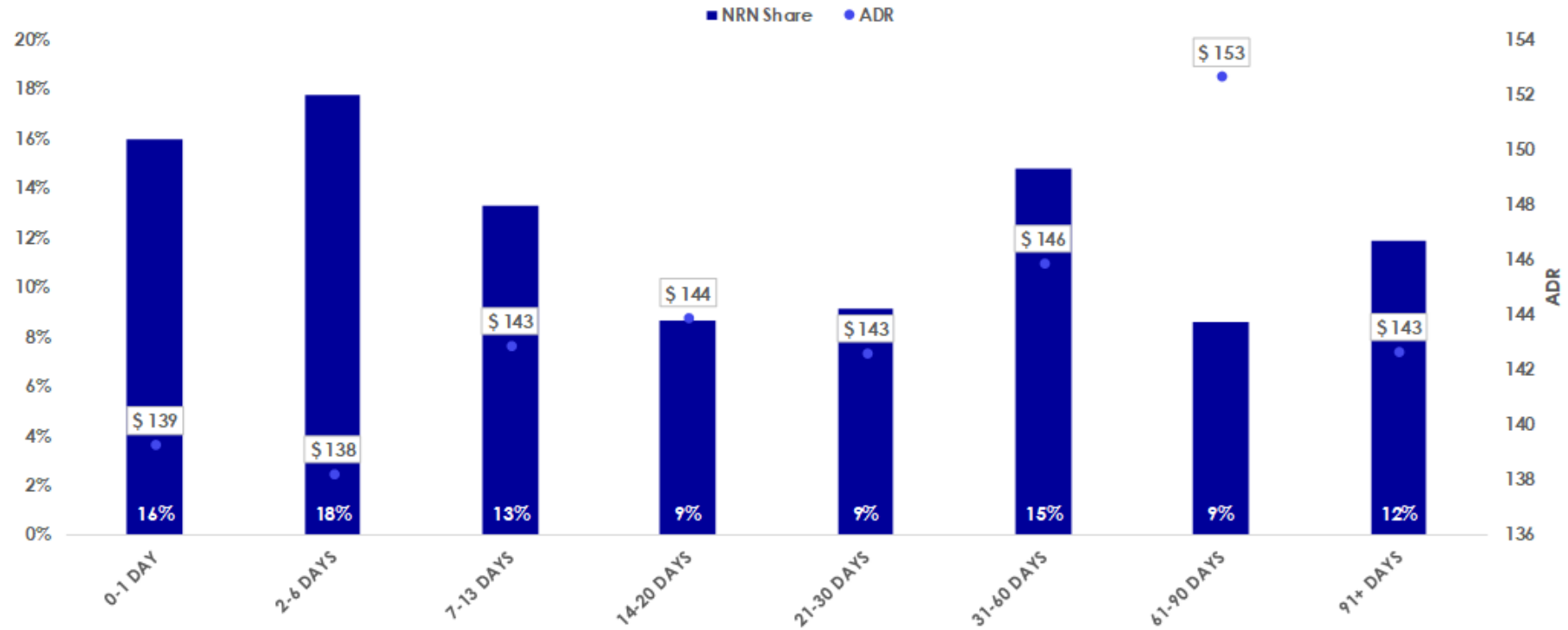


### Average Daily Rate in: USD



# Stabiele ADR – onafhankelijk van booking window

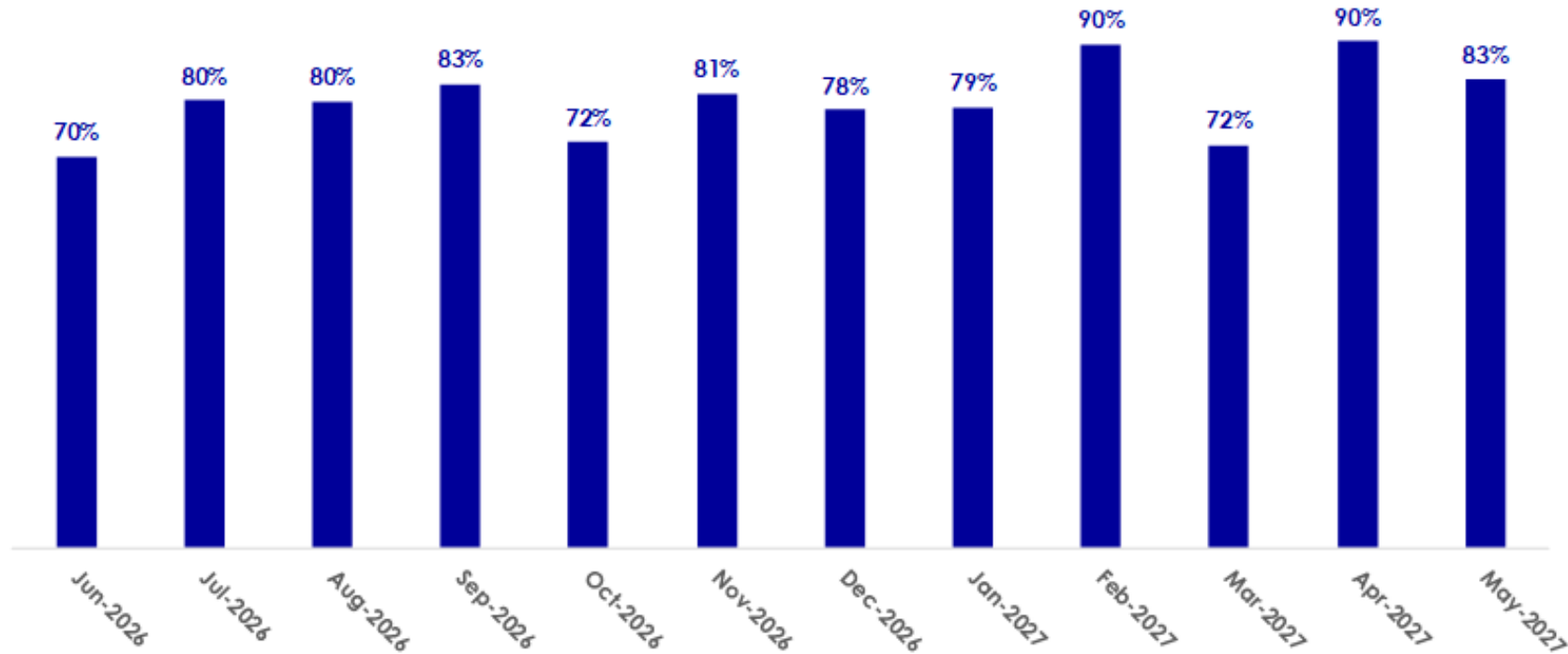
(Amsterdam markt daalt van \$ 245 (91+) naar \$ 159 (0-1 dag))



## Fluctuaties in flex tariefplannen per maand; verderuit wel wat flexibler

(Amsterdam markt sterker gericht op non ref op korte termijn dan Schiphol)

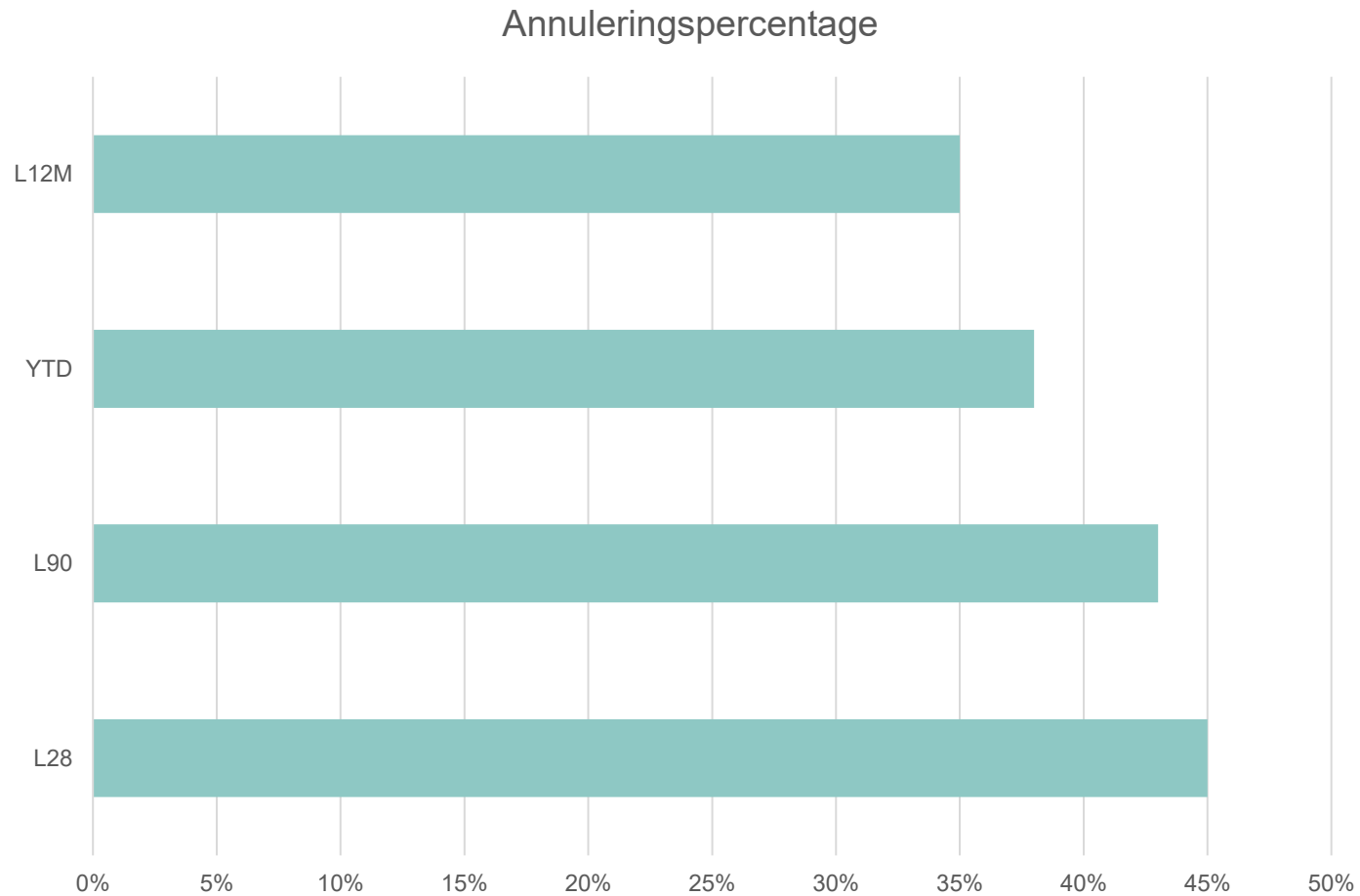
Refundable Rates share of room nights



Amsterdam	65%	68%	69%	73%	71%	74%	79%	80%	79%	88%	82%	86%
-----------	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----

# Annuleringspercentage toont stijgende lijn en hoger dan vorig jaar

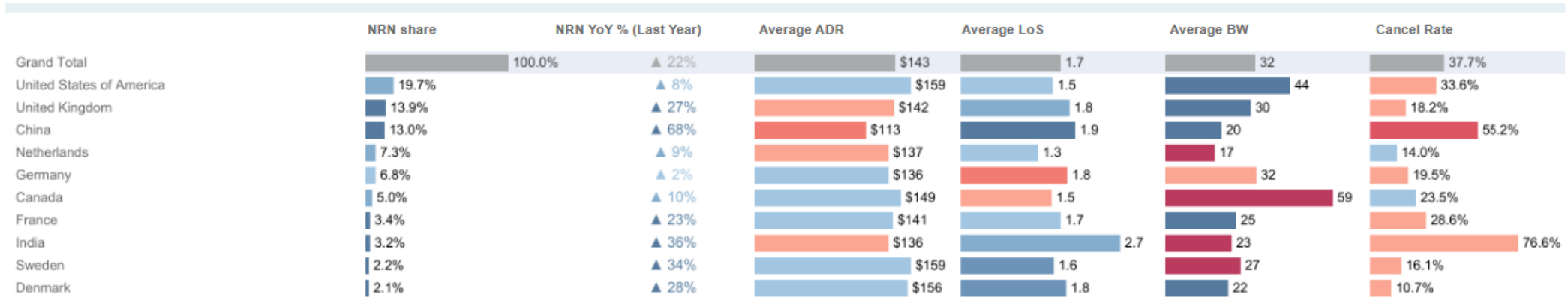
(Ook voor Amsterdam en andere Europese steden geldt dat er een stijging is in annuleringspercentage)



# USA nog steeds grootste markt, en stijgend; hoge ADR en lange BW

(UK en China groeien en groeien ook sneller dan in Amsterdam als geheel)



## Origin of traveler






## B2B segment groeit sterk, 2/3\* segment stijgt hardst

(In EMEA zien we in het algemeen stijging van 3\* en stabilisatie / kleine min in 4\*)

B2B vs. B2C bookings

	Share	YoY
 <b>B2B</b>	55%	+35%
 <b>B2C</b>	45%	+10%

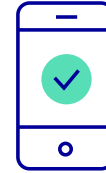
Star Segmentation

	Share	YoY	ADR	YoY
 <b>4*</b>	65%	+10%	\$161	+2%
 <b>3*</b>	25%	+55%	\$114	+1%
 <b>2*</b>	10%	+50%	\$95	-1%

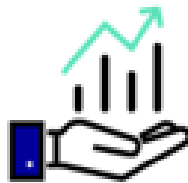
# Distributie tariefplannen winnen terrein



**Package: +/- 37%**  
(+8pp)



**Mobile: 30%**  
(+8%)



**Distributie rates: +/- 15%**  
(>100%)



**Corporate: 2%**  
(+3%)

#### 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)

# Schiphol kent sterkste groei, ADR \$10 onder gemiddelde

## Break Down (Year To Date) by

Top 25

Posu Sub Market

ai

	NRN share	NRN YoY % (Last Year)	Average ADR	Average LoS	Average BW	Cancel Rate
Grand Total	100.0%	▲ 2%	\$152	1.4	38	32.9%
Heathrow Airport (LHR)	24.4%	▲ 4%	\$140	1.3	41	26.4%
Roissy - Charles de Gaulle Airport (CDG)	20.4%	▼ -1%	\$149	1.4	34	37.3%
Schiphol Airport (AMS)	20.0%	▲ 16%	\$142	1.7	32	37.9%
Barajas Airport (MAD) - IFEMA Trade Fair	13.3%	▼ -8%	\$158	1.6	35	37.5%
Gatwick Airport (LGW)	6.4%	▲ 11%	\$136	1.2	41	15.5%
Fiumicino Airport (FCO) - New Fair	6.4%	▲ 0%	\$203	1.1	58	27.7%
Barcelona International Airport (BCN)	4.5%	▼ -4%	\$195	1.4	45	37.6%
Orly Airport (ORY)	3.4%	▼ -22%	\$126	1.3	27	25.4%
Istanbul Airport (IST)	1.2%	▼ -4%	\$253	1.2	18	27.7%

# Inzichten in andere sub markten; check het Extranet

The screenshot displays the Expedia Group Partner Central dashboard. On the left is a navigation sidebar with the following items: Home, Opportunities (9), Rooms and rates, Marketing, Reservations, Guest relations (1), Payments, Property details, Revenue management (34), **Data and insights** (highlighted with a green box), Internal tools, and Help and support. The main content area features several key sections:

- Enroll to create a business rate plan and boost bookings:** Hotels that offer business rates have experienced up to 55% growth in revenue.
- Boost growth with TravelAds:** Properties in your competitive set that use TravelAds sponsored listings saw an average of 20% greater conversion than those who don't.
- Partner reporting suite:** View detailed reports for more information on booking trends, past performance, future production, and how your performance compares to your competitive set. Includes a **View reports** button.
- Competitive set:** Keep your competitor list up to date.
- Booking insights:** View data for won and lost bookings.
- Guest insights:** Understand guests and how they book.
- Market insights:** Track market trends and demand patterns. (This section is highlighted with a green box).

# Inzichten in andere sub markten; check het Extranet

Data and insights • Market insights

## Market insights

Showing data for: All destinations **Change**

Monitor destination searches at different levels (state/province, multi-city area, city, neighborhood). Each level is standalone, meaning it is not inclusive of the levels below it.

**Your destination's demand**  
Discover when travelers search for your destination, at page views, and how many purchases they make.

Page visits:  This year  
Purchases:  This year

90,000  
80,000  
70,000  
60,000  
6,500  
6,250  
6,000  
5,750  
5,500

Mar 23 Ma

**Change**

Monitor destination searches at different levels (state/province, multi-city area, city, neighborhood). Each level is standalone, meaning it is not inclusive of the levels below it.

Show more

Deselect all

- Province state (Municipality of Lisse)
- City (Amsterdam)
- City (Haarlem)
- City (Hoofddorp)
- City (Leiden)
- City (Lisse)
- City (Noordwijk)
- City (Schiphol)
- City (Zandvoort)
- Neighborhood (Amsterdam City Centre)
- Amsterdam (AMS-Schiphol)

Cancel Update

Destinations **Change**

Monitor destination searches at different levels (state/province, multi-city area, city, neighborhood). Each level is standalone, meaning it is not inclusive of the levels below it.

Show more

Deselect all

- Province state (Municipality of Haarlemmermeer)
- Multi-city area (Amsterdam (and vicinity))
- City (Amsterdam)
- City (Hoofddorp)
- City (Schiphol)
- Neighborhood (Amsterdam City Centre)
- Neighborhood (De Hoek)
- Amsterdam (AMS-Schiphol)

Cancel Update

# Wanneer wordt er gezocht en wanneer geboekt

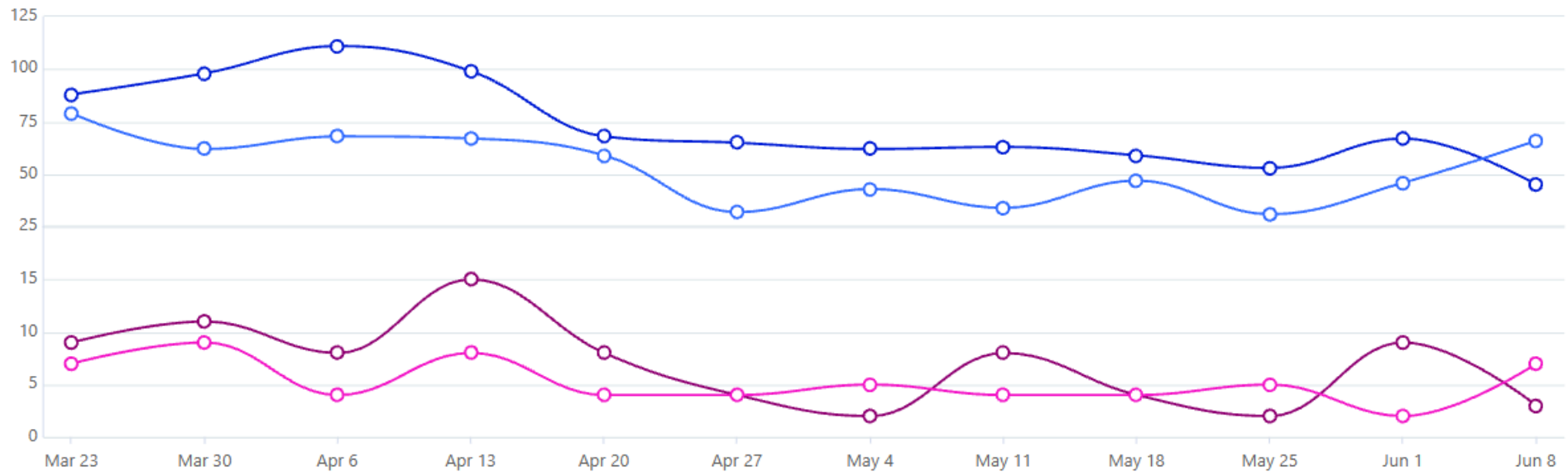
Showing data for: Municipality of Haarlemmermeer [Change](#)

## Your destination's demand by search date [i](#)

Discover when travelers searched for your destination on Expedia Group sites by looking at page views, and how many bookings they made the week of those searches.

Page visits:  This year  Last year

Purchases:  This year  Last year



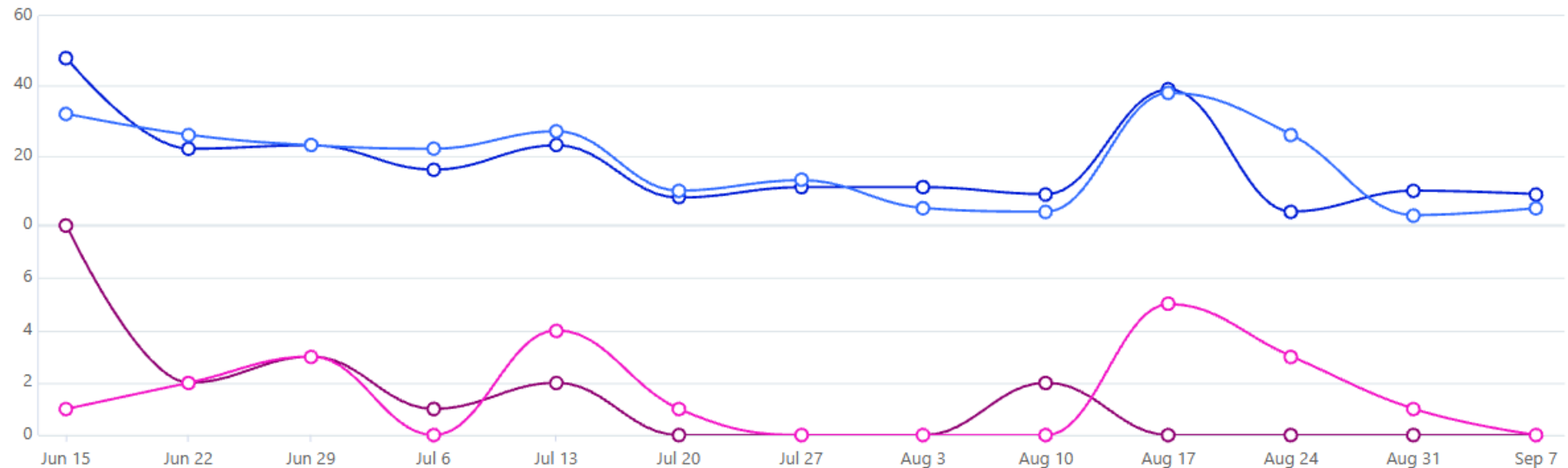
# En voor welke data wordt er gezocht en geboekt

## Your destination's demand by stay date ⓘ

Learn when you can expect travelers to return to your destination. These are the stay dates travelers are searching for in your destination, expressed in page views, and the amount of bookings completed for all properties in your destination for that week.

Page visits:  This year  Last year

Purchases:  This year  Last year



# T.o.v. vorig jaar neemt zoekvraag Duitsers en Engelsen (fors) toe

## Traveler trends breakdown — Jun 15, 2026–Sep 13, 2026

Get insights on the origin of travelers searching for your destination. ⓘ

Country/Region	↓ Page visits	Page visits (Last year)	Purchases	Purchases (Last year)	Length of stay	Length of stay (Last year)	Weekend share	Weekend share (Last year)
United States of America	41.7%	42.1%	60.0%	33.3%	1 night	2 nights	97.8%	75.0%
Germany	28.7%	13.2%	20.0%	33.3%	2 nights	2 nights	90.3%	100.0%
United Kingdom	11.1%	4.4%	20.0%	8.3%	5 nights	1 night	91.7%	20.0%
Canada	8.3%	15.8%	0.0%	0.0%	4 nights	3 nights	88.9%	72.2%
Denmark	3.7%	3.5%	0.0%	0.0%	3 nights	4 nights	100.0%	75.0%
Netherlands	3.7%	1.8%	0.0%	8.3%	1 night	5 nights	25.0%	100.0%
Sweden	2.8%	7.9%	0.0%	0.0%	5 nights	2 nights	100.0%	100.0%
Ireland	0.0%	11.4%	0.0%	16.7%	-	4 nights	0.0%	100.0%

# Agenda

1. Markt trends
2. Algemene trends
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# Unpack '26

Summer

## Set-Jetting Summer



Expedia Hotels.com Vrbo

24K travelers, 18 countries  
(first party data & social media)

**\$8B** projected Set-Jetting industry in the U.S. alone

**60%** increase in searches to Yorkshire, U.K. after the "Wuthering Heights" release

**110%** increase in searches to Muskoka, Canada after "Heated Rivalry" release

## Hotel

## Hop Summer

The desire for flexibility, value, and discovery are driving decision-making.

**54%** of travelers want to Hotel Hop, or book multiple hotels within a single destination

**1K+** increase in social buzz around "hotel hopping" year-on-year





## Event Hopping

Major sports events, festivals, and concerts extend stays and drive exploration beyond host cities



## Road Tripping

Iconic road-trips - like Route 66's centennial - encourage multi-stop itineraries.

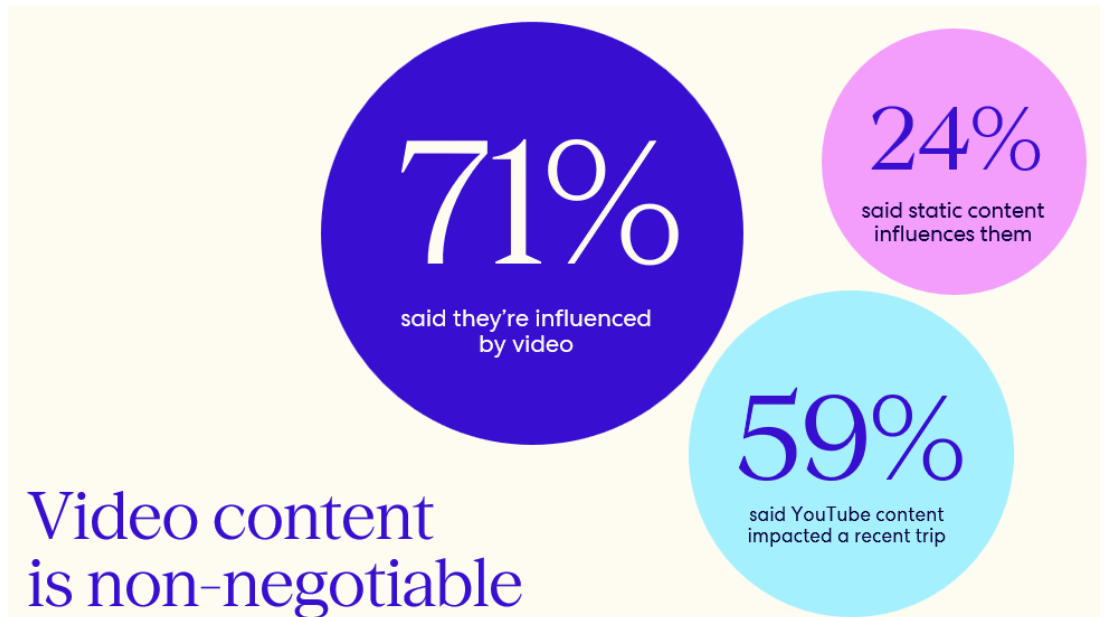
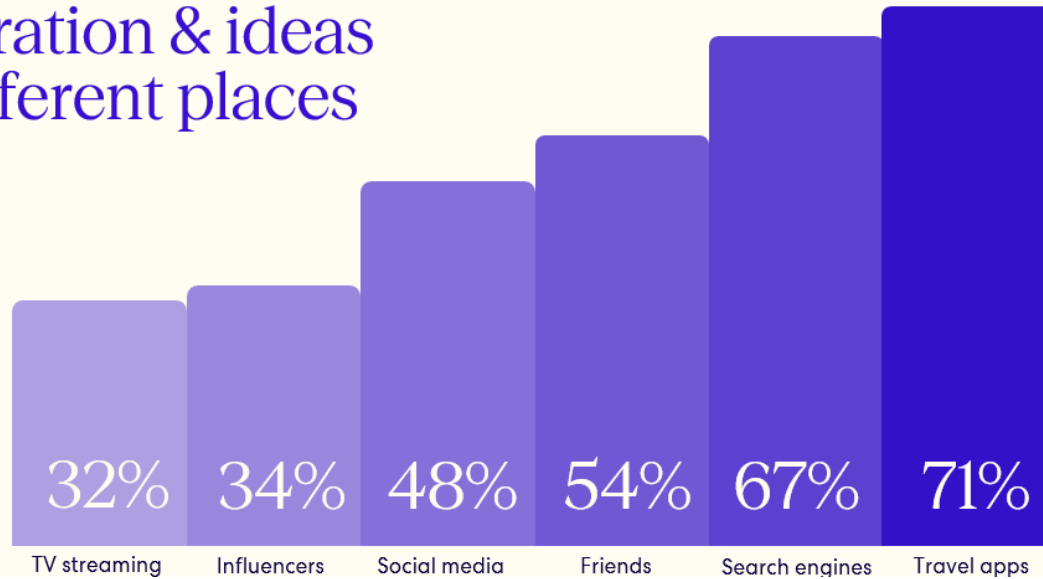


## Bleisure Hopping

Work trips blend seamlessly with leisure in cities like Helsinki, London, and Oslo.

# Veel onderzoek gedaan omtrent advertising: WANDER

Travelers find inspiration & ideas in different places




# Resultierend in een framework en checklist

expedia group advertising

HOW TO CREATE  
ads travelers  
can't resist

Should you try video? Use AI?

Instead of guessing, use  
the research-backed WANDER  
checklist to make ads that inspire.



Travelers are most likely to book when content feels:



## Watchable

Did I experiment with video instead of static images?

→ 71% of travelers are influenced by video versus 24% by static images.\*



## Authentic

Have I tried user-generated content or worked with a content creator?

Is the tone of my messaging transparent, clear, and confident to build trust?



## Narrative-driven

Do I have a clear beginning, middle, and call to action at the end?



## Designed for attention

Are the scenes in my video between 2-9 seconds for optimal engagement?



## Enhanced with AI

Does my AI usage have human input?

Are my visuals not fully AI generated?

→ Less than half of travelers are comfortable with fully AI-generated visuals.\*



## Representative and relatable

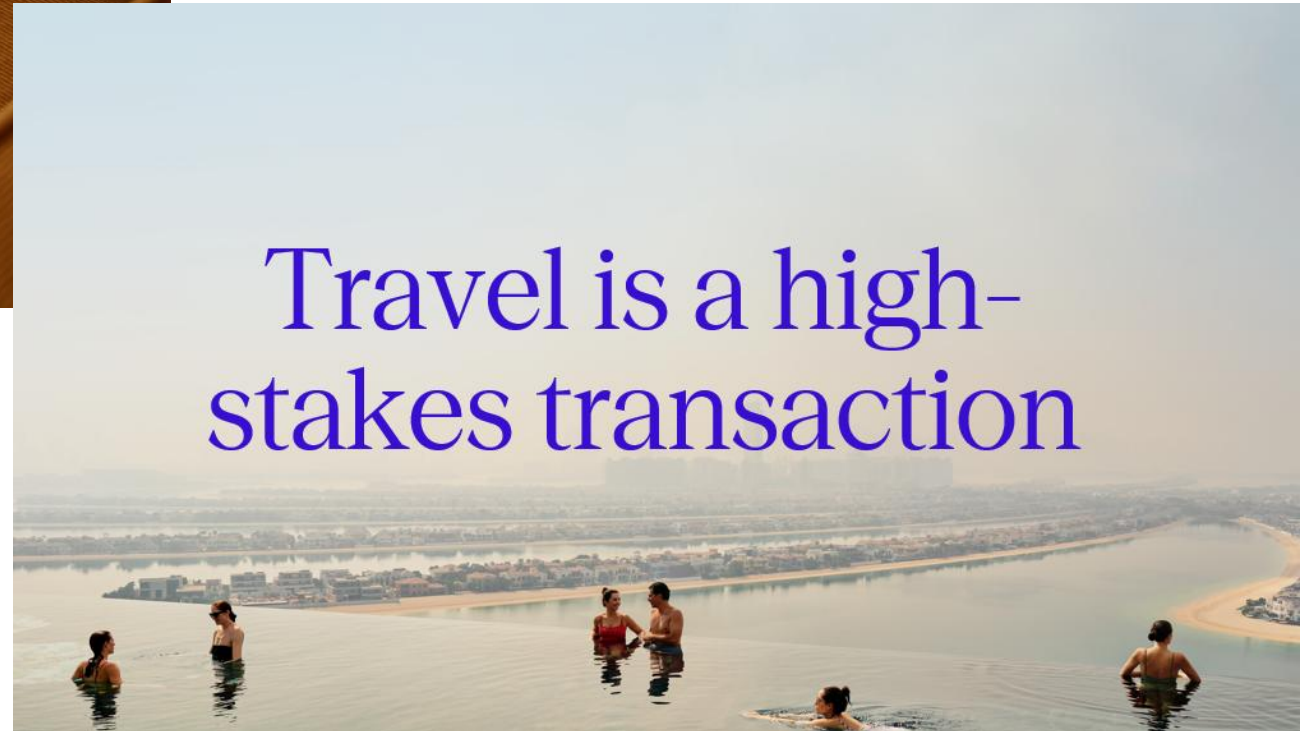
Does my content reflect the diverse identities and needs of a variety of travelers?

→ 34% of travelers say inclusive messaging made them trust a travel brand.\*

# AI and travel



AI is changing how  
people discover  
and plan travel



Travel is a high-  
stakes transaction



# Travelers trust AI for planning

53%

are comfortable letting AI suggest where to go

42%

want AI monitoring prices and key booking moments

40%

are using AI to help build full itineraries

Most travelers  
say no to  
AI booking

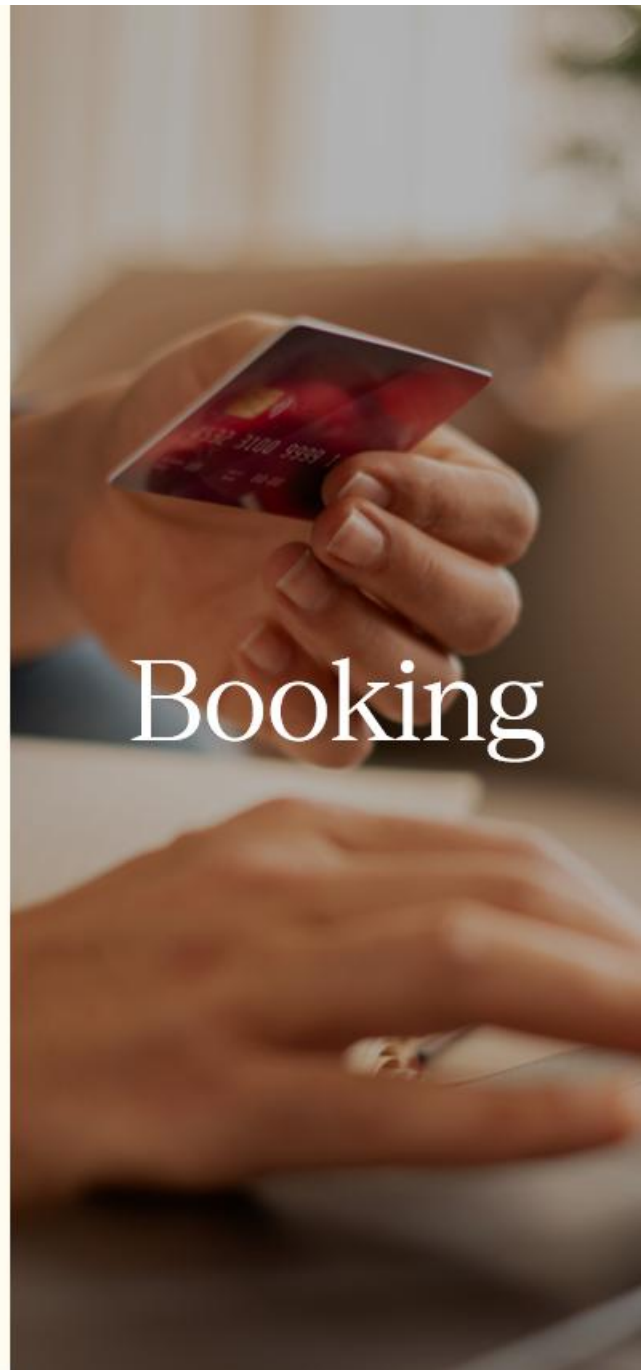
66%

of travelers would not trust AI to book  
travel on their behalf



Planning

# The AI trust gap



Booking

Traditional  
platforms still  
outpace AI  
platforms



8%

rely primarily on AI  
platforms for planning

---

49%

use online travel  
agencies (OTAs)

---

59%

use search engines  
for research



# Trust anchors the traveler journey

Maintaining high-quality structured content

---

Ensuring pricing, availability and policies are accurate

---

Supporting seamless booking and servicing

Scan to learn more  
about the AI trust gap



Scan to learn more  
about Wander



Scan to learn more  
about the Unpack 26



# Alle onderzoeken terug te vinden op onze partner website

The screenshot shows the website [partner.expediagroup.com/en-us/resources/research-insights#top-of-search](https://partner.expediagroup.com/en-us/resources/research-insights#top-of-search). The navigation bar includes the Expedia Group logo, a 'Partner with us' link, and menu items for 'Partnership', 'Industries', 'Solutions', and 'Resources'. The 'Resources' menu is open, highlighting 'Research & insights'. Below the navigation, the main heading is 'Dive into the latest research reports'. There are filter buttons for 'Hotels' and a '6 results' indicator. Three research report cards are displayed:

- Game on: 2026 soccer heats up travel demand**  
RESEARCH & INSIGHTS  
Travel fans mean business. A surge in sports tourism positions cities across North America to win big this summer.  
Read more →
- Unpack '26: The Trends in Travel**  
RESEARCH & INSIGHTS  
From hot destinations to new trends, get a data-driven guide and actionable tips on what's next in travel.  
Explore the trends →
- Summit Seekers: Who mountain travelers are and how they book**  
RESEARCH & INSIGHTS  
New research reveals why travelers choose mountain destinations, their values, and how to connect with this growing audience.  
Download the report →

<https://partner.expediagroup.com/en-us>

# Agenda

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# Travel inventory powered by Rapid API

## Cars



## Activities



## Flights



## Lodging



## Trip protection





expedia group



expedia group™

 CarTrawler



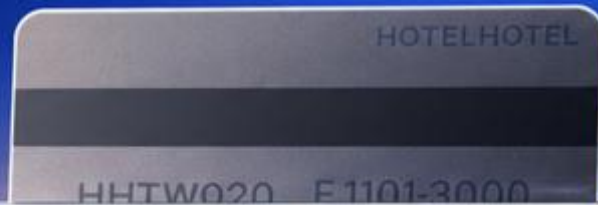
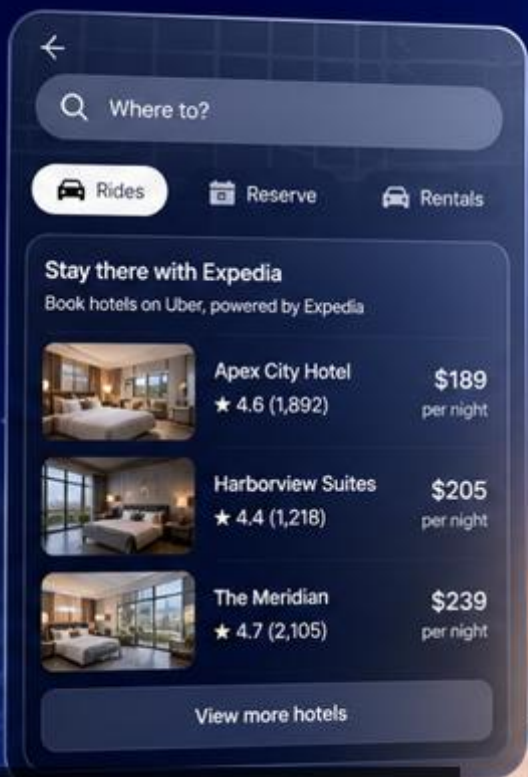


expedia group

US users for now

700k properties  
in Uber App

Uber rides soon  
in Expedia App



## Partner advantages

**Future reach** : Massive global audience, +70 countries & 15K cities, 202 million monthly users, 46 million UberOne members

**Traveler Quality** : relatively young, digital and app-first customer base, frequent usage, simple transactions

Seamless travel,  
together.

Uber

Expedia

En route  
**3 min away**

John • 4.9★  
Black SUV • 7ABC123




expedia group

150 M followers

Launched with 12  
hours livestream

Dedicated website:  
[Exspeedia.com](https://Exspeedia.com)

 Expedia x

**ISHOWSPEED**

#### Partner advantages

- **Strong visibility with younger audiences** that are difficult to reach through traditional travel channels
- Better ability to **turn social media** into traffic and bookings
- **Stronger destination and offer appeal** through influencer storytelling with massive reach (150M followers)



## Partner advantages

- **Discovery channel large scale & credible** : 67% have already used AI in their travel journey, 89% want to use it for future trips, more trusted source for trip planning
- Gives access to **high intent travelers earlier** in the funnel : inspiration and comparison
- **More qualified traffic** for hotels : AI already helps travelers refine destination, dates, budget etc before redirecting

# Traveler Profiles

Find the Travelers You Need to Succeed

## What are your top goals?

Select up to 3.

Fill last-minute gaps

Drive early bookings ✓

Increase length of stay

Attract higher-value travelers ✓

Fill midweek & shoulder periods ✓

Reduce cancellations

Target high-intent audiences

Build brand consideration

Convert intent into purchases

← Back

See my matches →



Start over

My matches

## Meet your matched travelers

These profiles are selected based on your goals. Pick a profile to see what drives them — and how to win them.



### Business Travelers

Meet Priya

Frequent, repeat travelers prioritizing reliability & convenience

Get the insights →



### B2B Network Travelers

Meet Damien

Incremental, hard-to-reach travelers booking through their trusted platform of choice

Get the insights →



### Quality Seekers

Meet John

High-spend travelers choosing luxury, comfort, and service

Get the insights →

# Traveler Profiles

Find the Travelers You Need to Succeed



Start over

My matches

Connect with an account manager

## Business Travelers

★ Frequent, repeat travelers prioritizing reliability & convenience

Business Travelers prioritize efficiency & reliability, looking for convenient access to business districts & transit, reliable Wi-Fi, practical workspaces & easy dining options. They book frequent trips, often to the same cities, and may extend travel for leisure.

### At a glance

Booking

Primarily self-bookers

Age

25–44

Travel timing

Domestic city stays with Mon/Tue check-ins

Booking window

Less than 30 days

Benefit

Less price sensitive than other travelers

Insights from



How they travel

What they consider

Who they are

How to win them

Explore more profiles

[Try it Today!](https://partner.expediagroup.com/en-us/traveler-profiles/)

<https://partner.expediagroup.com/en-us/traveler-profiles/>

# Travelads; locale inzichten – Market Managers advisereren

EXCLUSIVE BENEFITS

## Stand out from the crowd with **TravelAds Sponsored Listings**

Maximize exposure and drive room nights with a premium listing on the search results page.



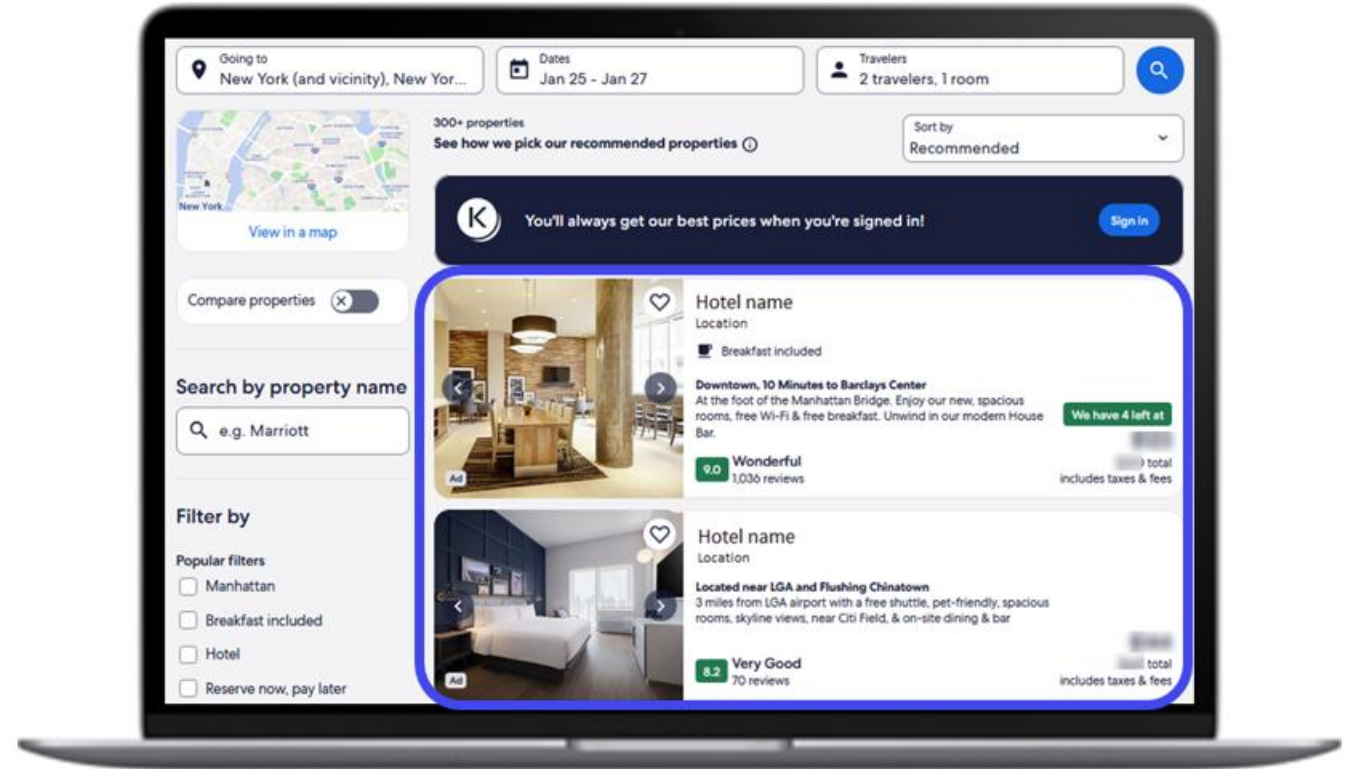
Reach your ideal traveler with **customizable content and advanced targeting** options.



A **cost-effective pay-per-click (PPC)** advertising solution that works for almost any budget



**Flexibility** to be used at any time and drive specific goals



# Agenda

1. Markt trends
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# Take aways

## Content

Streef naar 100% content score  
(geen info=geen match)

Content is king = zowel voor  
differentiatie als upsell

## Pricing

Zorg voor up-to-date prijzen en  
beschikbaarheid van alle  
kamertypes en alle tariefplannen

## Stand out

Middels content

Middels additionele tools zoals  
TravelAds en Accelerator

# Agenda

1. Markt trends
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# Q&A

# Appendix

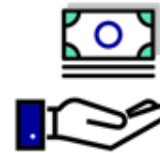
# Domestic aandeel Schiphol dubbel tov Amsterdam



Average Length of Stay



Average Booking window



Average Daily Rate



Average Cancel Rate



Share of Total Room Nights

**International**

1.7 days

33.3 days

\$143

39%

92.7%

**Domestic**

1.3 days

17.3 days

\$136

14%

7.2%

# 1/3 boekt 31+ dagen, 40% blijft 3 nachten of langer

		Booking Window							Total	
		0-1 day	2-6 days	7-13 days	14-20 days	21-30 days	31-60 days	61-90 days		91+ days
Length of stay	1 day	10%	8%	5%	3%	3%	5%	2%	4%	41%
	2 days	2%	3%	3%	2%	2%	3%	1%	2%	19%
	3 days	1%	2%	2%	1%	1%	2%	1%	2%	14%
	4 days	1%	1%	1%	1%	1%	2%	1%	1%	9%
	5 days	0%	1%	0%	0%	0%	1%	0%	1%	4%
	6 days	0%	1%	0%	0%	0%	1%	0%	0%	3%
	7 days	0%	0%	0%	0%	0%	0%	0%	0%	3%
	8-14 days	0%	1%	1%	0%	0%	1%	1%	1%	5%
	15-30 days	0%	0%	0%	0%	0%	0%	0%	0%	2%
	Total	16%	18%	13%	9%	9%	15%	9%	12%	100%

# Eveneens stijging in kamernachten, ten koste van ADR

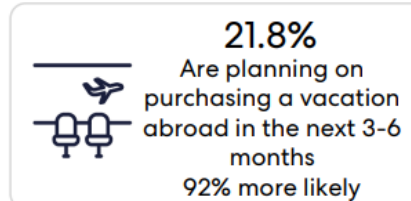
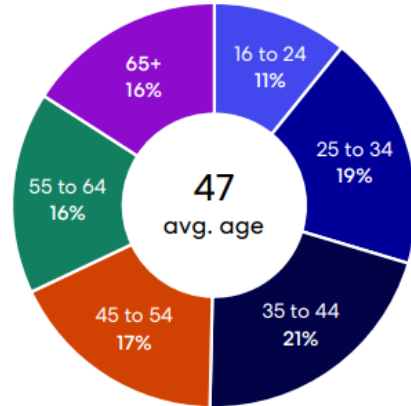
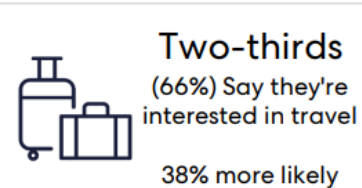
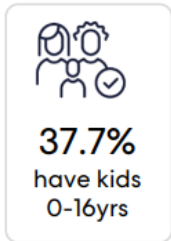
		Rest of Jun	July	August	September	October	November	December	January	February	March	April	May	N12M
Kamernachten	OTB	+15%	+32%	+22%	+29%	+27%	+33%	-2%	+31%	-19%	-2%	+32%	+9%	+24%
	L28	+8%	+28%	+33%	+51%	+27%	+50%	-8%	-6%	+11%	-14%	+238%	+80%	+25%
	L7	-10%	+29%	+60%	+147%	+90%	+152%	-5%	-27%	+50%	-73%	-475%	-13%	+31%
ADR	OTB	\$135	\$126	\$142	\$138	\$133	\$131	\$128	\$144	\$137	\$134	\$143	\$139	\$133
		-13%	-1%	+2%	-10%	+0%	-1%	+1%	+21%	+4%	+15%	-18%	-4%	-5%
	L28D	\$127	\$117	\$123	\$129	\$125	\$128	\$134	\$142	\$132	\$111	\$126	\$128	\$123
		-21%	-3%	-8%	-15%	-10%	+1%	+4%	+19%	+1%	-10%	-19%	-31%	-12%
	L7D	\$131	\$117	\$117	\$127	\$139	\$151	\$137	\$158	\$112	\$115	\$144	\$100	\$124
		-19%	-7%	-17%	-15%	-3%	-16%	-17%	+27%	-24%	+4%	+15%	-48%	-15%

# Wat inzichten vanuit onze Media Solutions zijde

GW I INSIGHT

## Expedia Group audience profile USA

### DEMOGRAPHIC PROFILE



### TOP 5 VACATION MOTIVATIONS



45.1%

Enjoying yourself / relaxing



40.0%

Experiencing a new place / culture



32.2%

To do new / exciting activities



27.1%

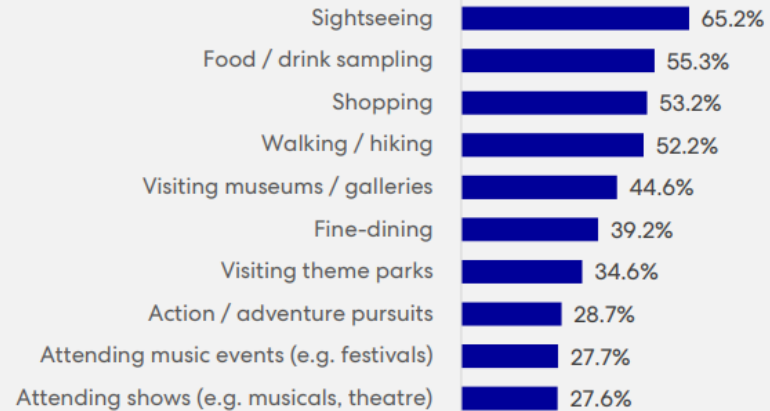
Explore the outdoors / adventure



26.8%

To try new food

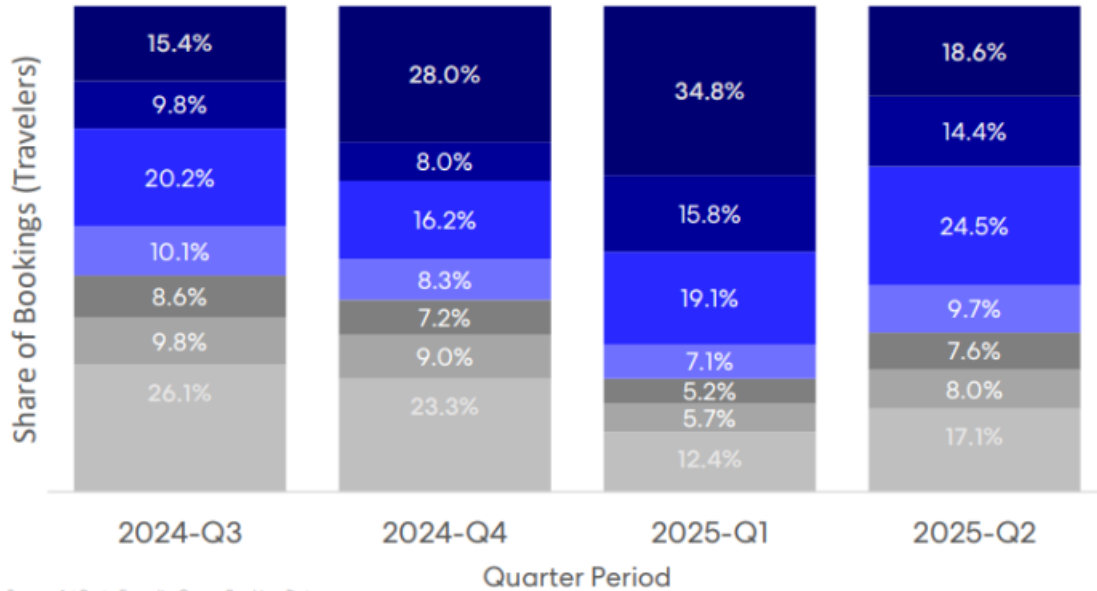
### TOP 10 ACTIVITIES ENJOYED WHILST ON VACATION



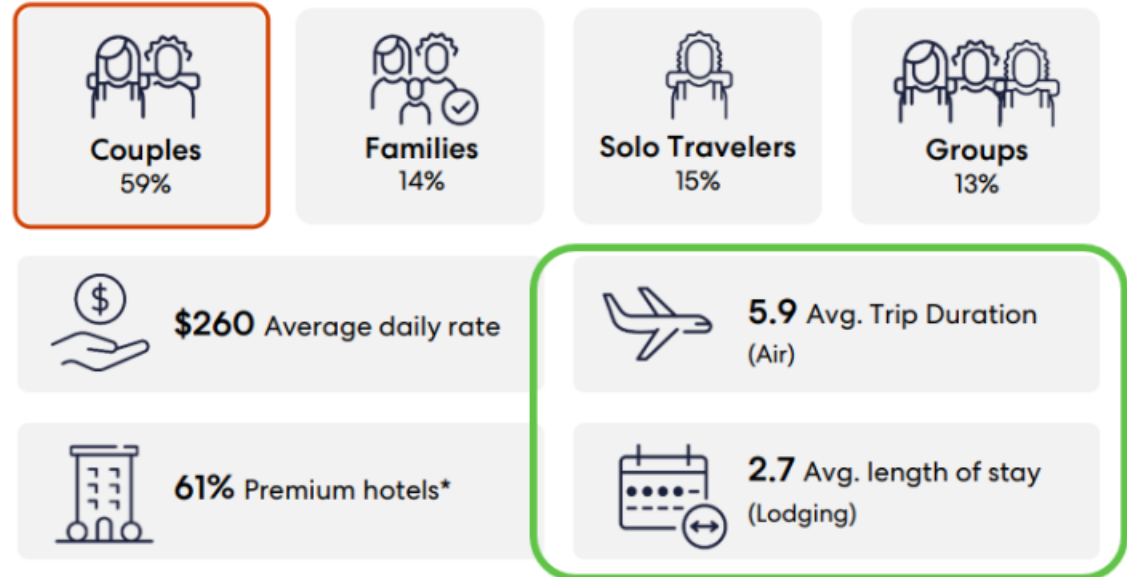
# Amsterdam onderdeel van geheel, veel premium nachten

## US POS: BOOKING WINDOW BY QUARTER

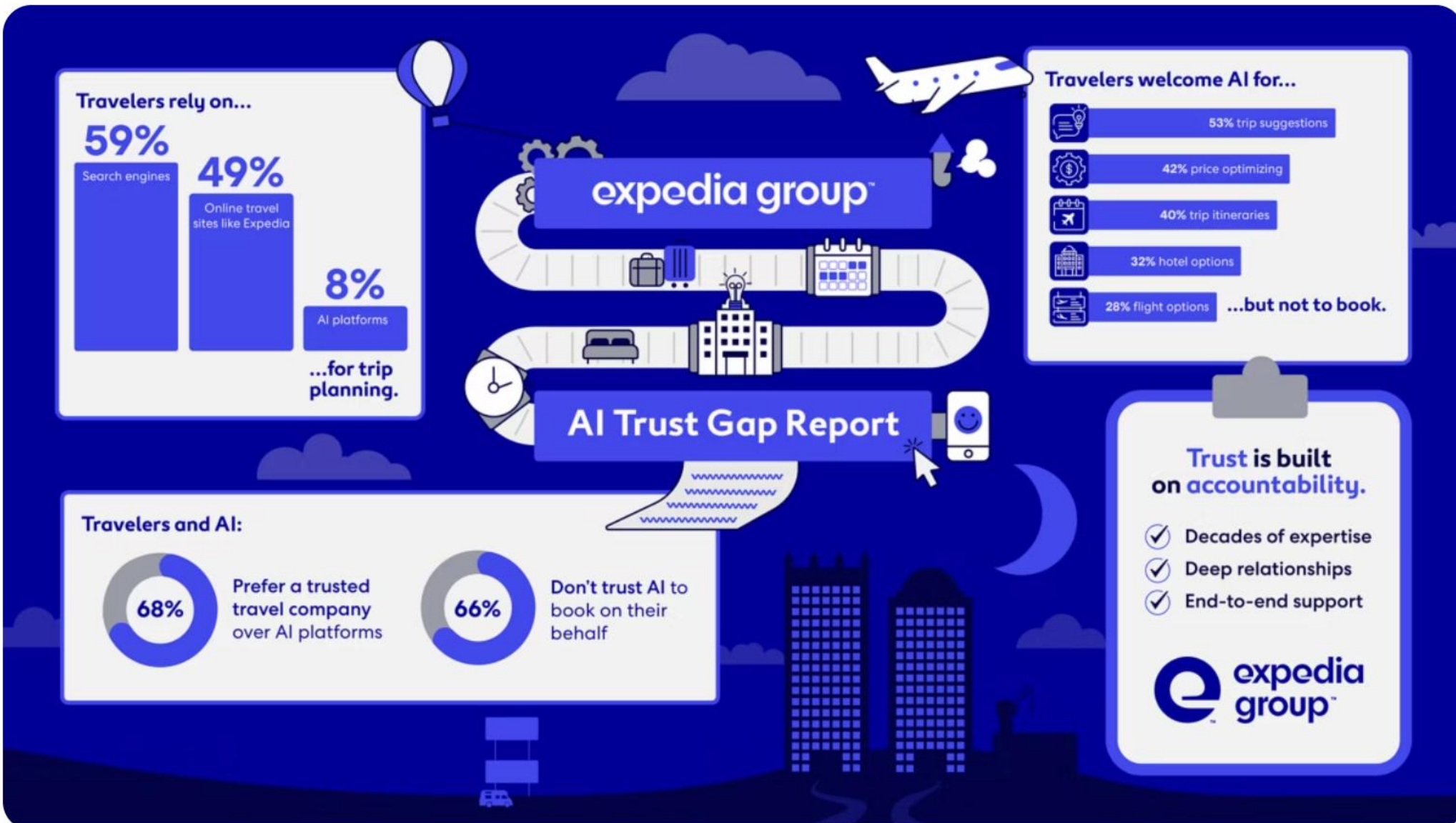
■ 0-6 Days ■ 7-13 Days ■ 14-20 Days ■ 21-30 Days ■ 31-60 Days ■ 61-90 Days ■ 91+ Days



## US POS: TRAVELER DEMOGRAPHIC

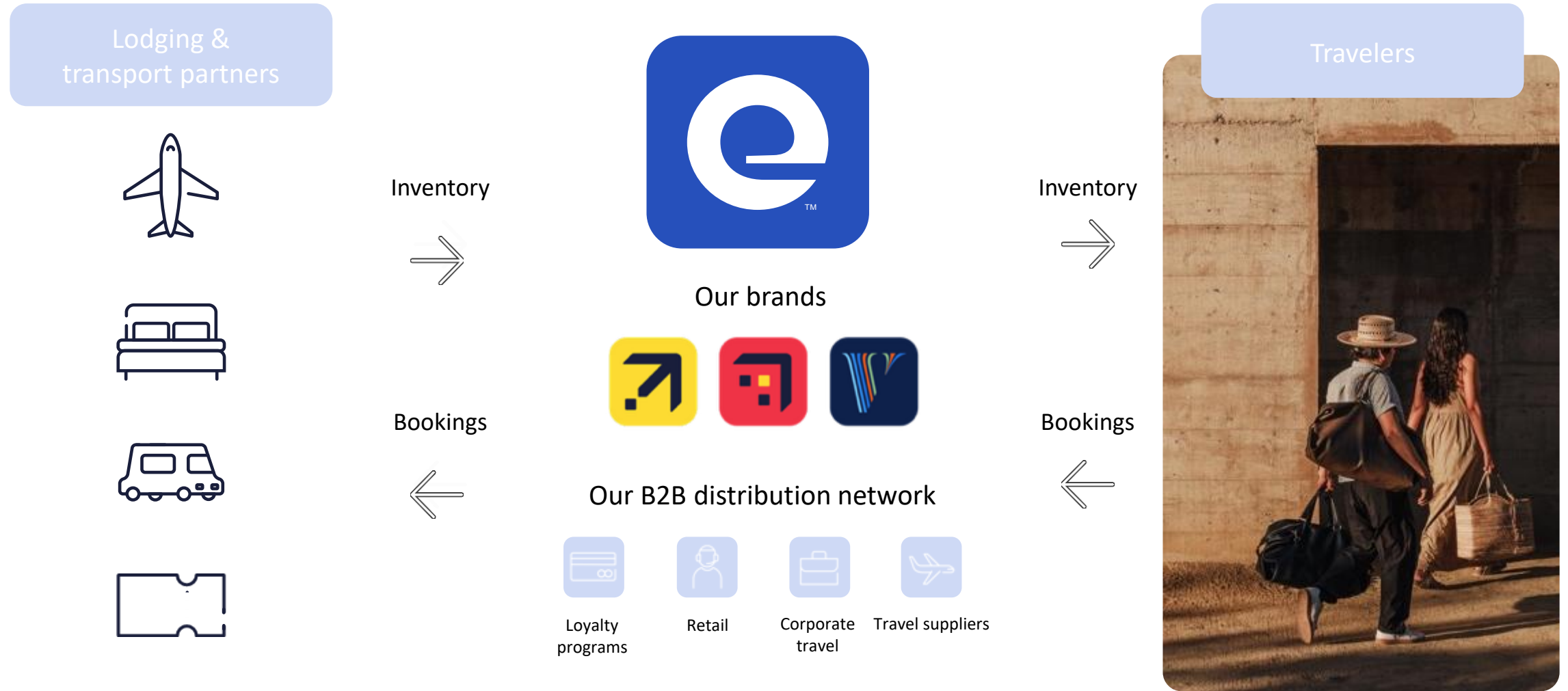


# The AI trust GAP



1. Expedia UVP
2. B2B network

# One marketplace, endless opportunities for your properties.



# Brand power that drives more stays



# Our vast B2B distribution network spans across the globe



70K+

B2B partners



150K

Travel agents

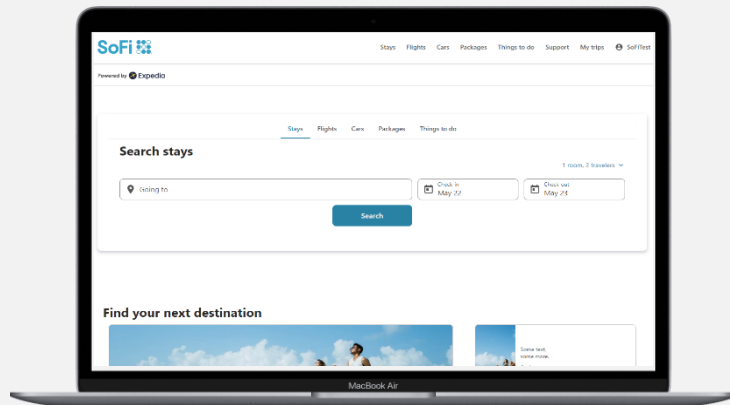


230

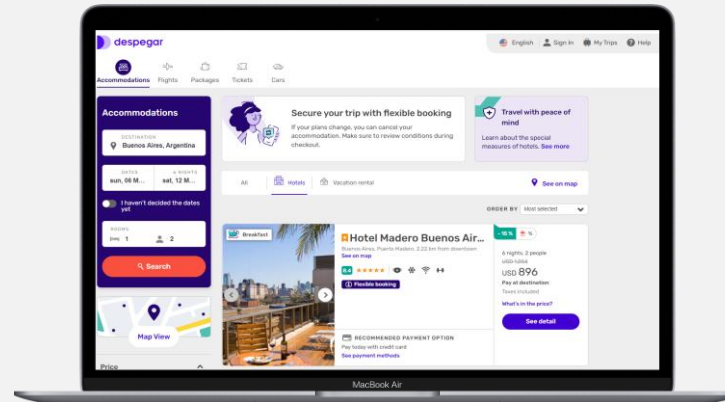
Countries\*

# Our three major B2B travel distribution products

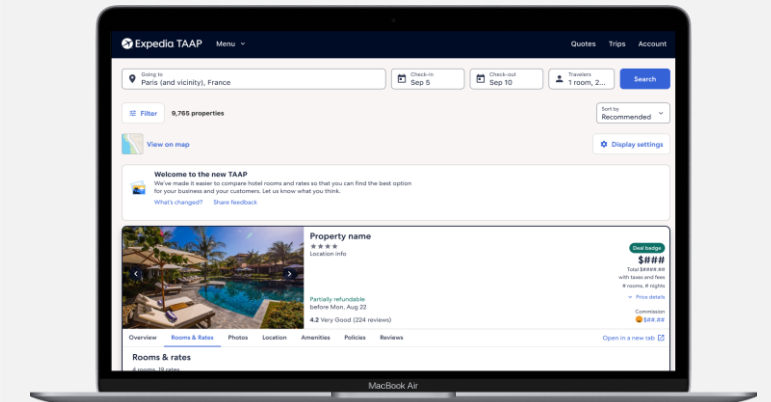
## White Label Template



## Rapid Hotel API



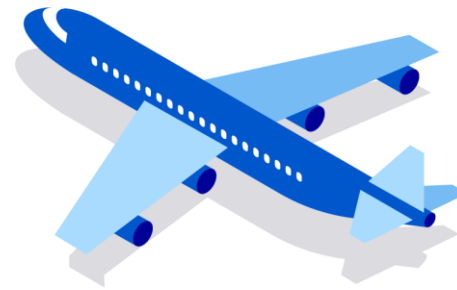
## Expedia TAAP Travel Agent Affiliate Program



# EG's B2B Network brings demand from high value traveler segments



**Loyalty**



**Travel supplier**



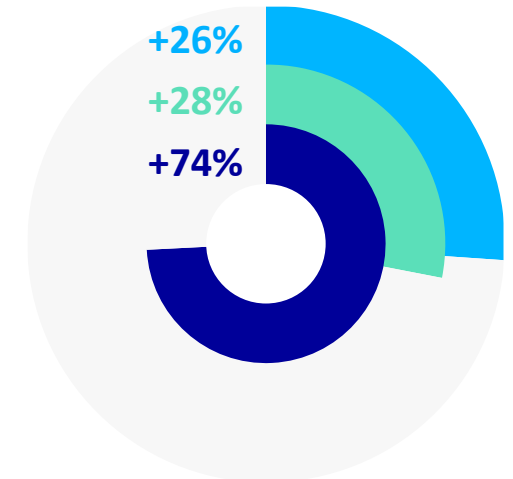
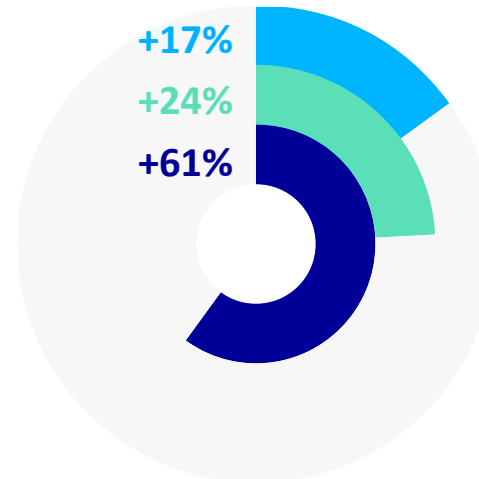
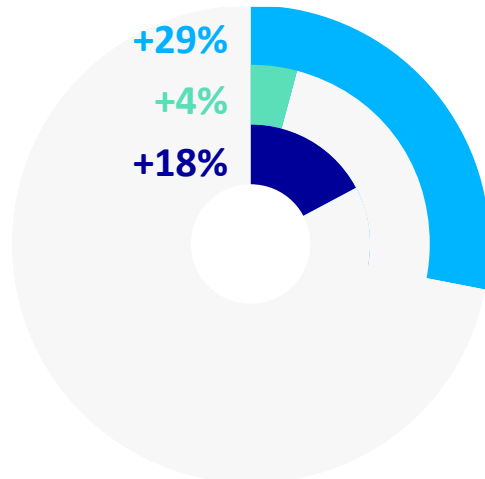
**Travel agencies**

Average day rate

Average length of stay

Average booking window

... vs rest of EG business



# Connect with leading travel brands globally

Capture B2B demand in addition to what you already receive through our EG brands with B2B Distribution Rates.



# Where does the money go?



49%

of wholesale rates  
go to unintended  
endpoints

---

48%

of unauthorized resellers  
post rates publicly

---

49%

human errors

Note: Respondents selected all that apply.



# We care about rate integrity as much as you

## Active monitoring

## Automated tools

CRA and ARM are available to help prevent overlooked rate changes.

## Rigorous vetting

All B2B partners are screened and certified before joining.

## Decisive action

Rate issues trigger immediate action and escalating penalties, up to partner termination.

# 75K

trusted global partners

# 10%

increase in midweek stays

# 2/3

of our B2B bookings are from non-U.S. travelers

## Power of our global B2B distribution network

