



Berlin Hotel Market Dynamics

PRICING & MARKET ANALYSIS (19-22 OCTOBER 2026)

This report compares double-room OTA quotations for 63 large Berlin hotels (23 five-star and 40 four-star properties, with the latter having over 130 rooms). The stay dates are 19-22 October 2026. Breakfast-inclusive rates with the same cancellation conditions were recorded manually at successive lead times. The results describe advertised room rates, not confirmed bookings or occupancy.

1. Market Overview & Averages

The largest average rate increases were observed for stays on 20 and 21 October. Both segments showed lower final quoted rates on 22 October, although these remained above 19 October levels. This pattern is consistent with a temporary high-price period; OTA quotations alone do not establish its cause or actual demand.

Stay Date	Category	Base Price (EUR)	Final Price (EUR)	Net Change (%)
19 Oct 2026	4-Star	184.2	180.1	-2.2%
	5-Star	318.3	355.3	+11.6%
20 Oct 2026	4-Star	220.7	318.9	+44.5%
	5-Star	399.7	551.0	+37.9%
21 Oct 2026	4-Star	233.0	324.4	+39.2%
	5-Star	435.1	525.7	+20.8%
22 Oct 2026	4-Star	202.5	210.5	+4.0%
	5-Star	345.0	378.0	+9.6%

2. Methodology & Definitions

Source: public OTAs; breakfast included; the same cancellation terms throughout. Five-star tracking began 9 Sep 2026 (T-40 to T-43); four-star tracking began 12 Sep (T-37 to T-40), depending on stay date. 'Closed' means not offered for sale on the observed OTA, not a confirmed sell-out. Status charts compare each quote with that hotel's first available rate (within +/- EUR 3 = Stable). Average-rate figures reproduce the original report's summary values.

Daily Analysis: 19 October 2026 (Reference Night)

4-STAR FINAL AVERAGE RATE

180.1 EUR

5-STAR FINAL AVERAGE RATE

355.3 EUR

19 October provides a lower-rate reference for the four stay dates. The four-star average quote declined by 2.2% between the first and final observations, whereas the five-star average increased by 11.6%. These are changes in advertised OTA offers, not direct measures of hotel occupancy.



Daily Analysis: 20 October 2026 (High-Price Night)

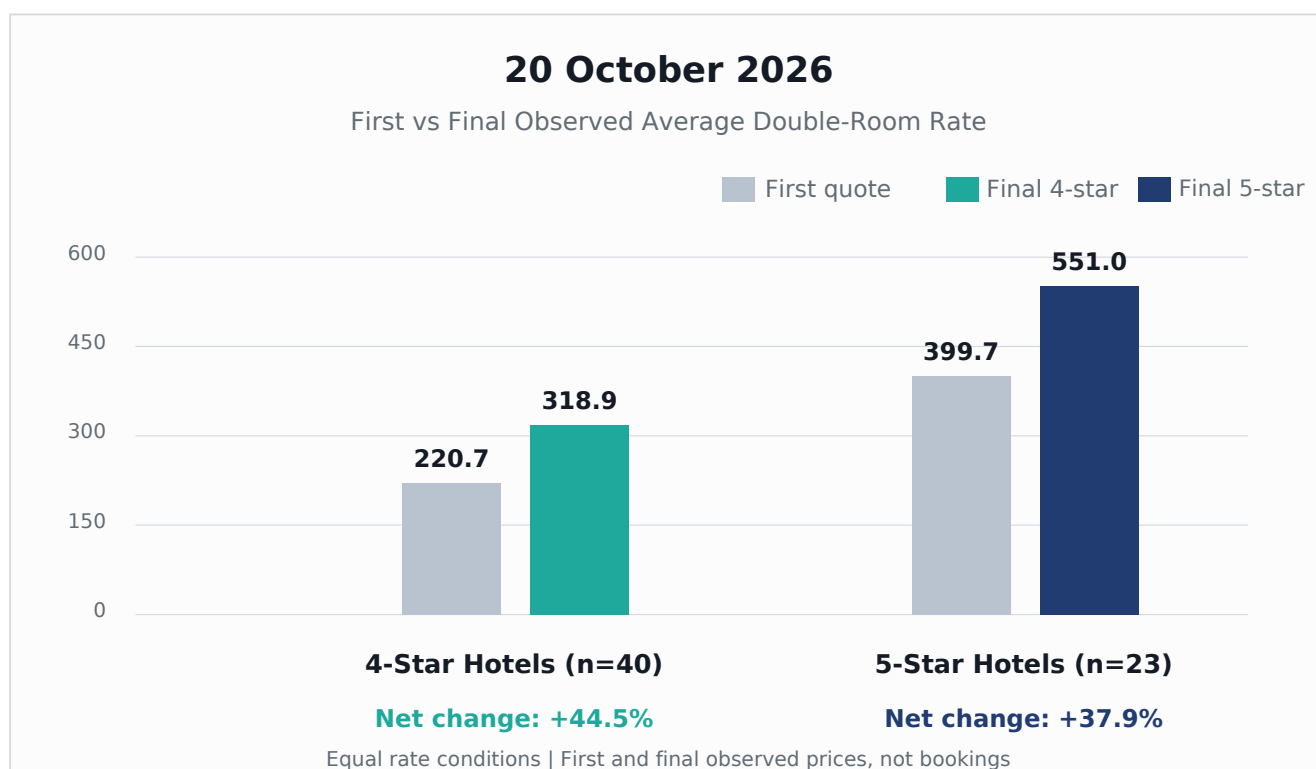
4-STAR FINAL AVERAGE RATE

318.9 EUR

5-STAR FINAL AVERAGE RATE

551.0 EUR

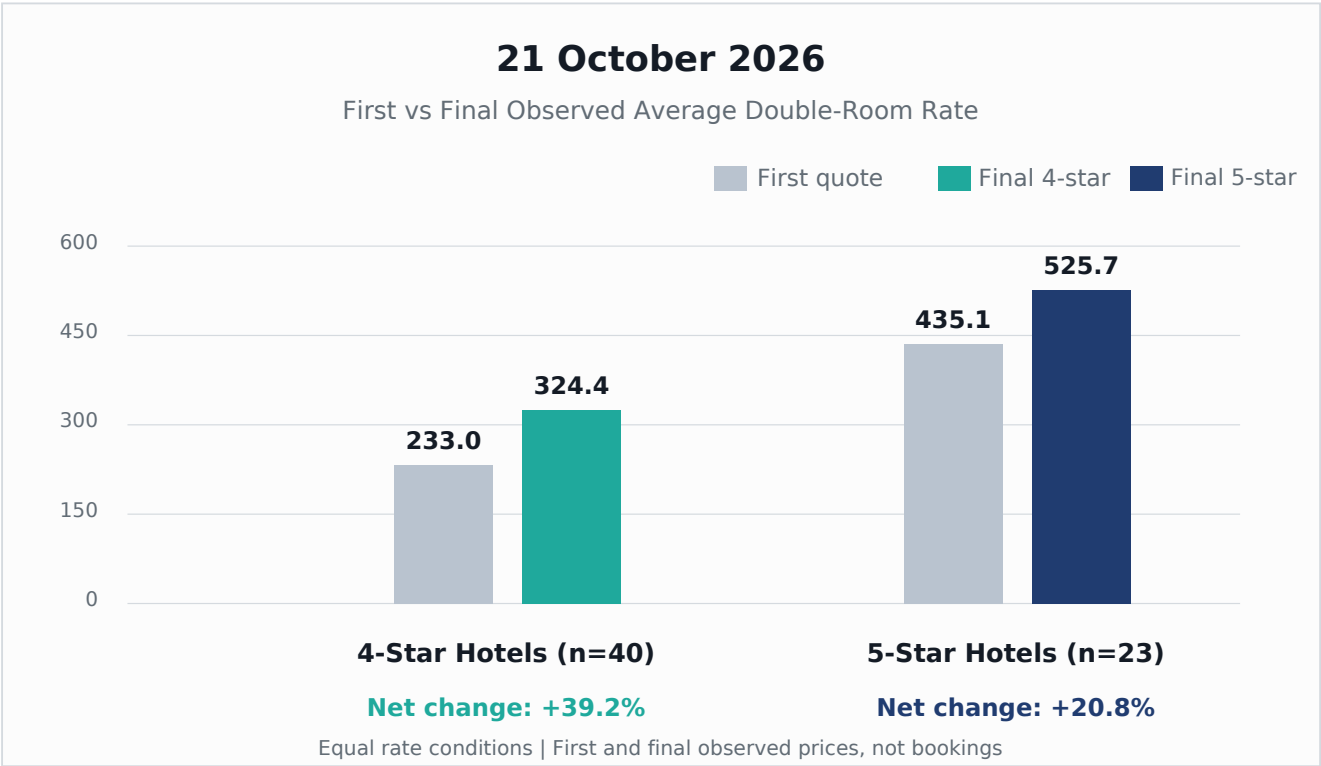
20 October shows sharply higher quoted rates in both segments. The four-star average rose from EUR 220.7 to EUR 318.9 (+44.5%), while the five-star average increased from EUR 399.7 to EUR 551.0 (+37.9%). Higher prices may be consistent with market compression, but the report cannot isolate a single cause.



Daily Analysis: 21 October 2026 (Sustained High Prices)

4-STAR FINAL AVERAGE RATE	5-STAR FINAL AVERAGE RATE
324.4 EUR	525.7 EUR

Elevated rates persisted for stays on 21 October. The four-star segment reached its highest final average across the four dates (EUR 324.4), an increase of 39.2% from the initial quote. The five-star final average was EUR 525.7 (+20.8%). Both observations describe published prices rather than realized revenue.



Daily Analysis: 22 October 2026 (Post-Peak Moderation)

4-STAR FINAL AVERAGE RATE

210.5 EUR

5-STAR FINAL AVERAGE RATE

378.0 EUR

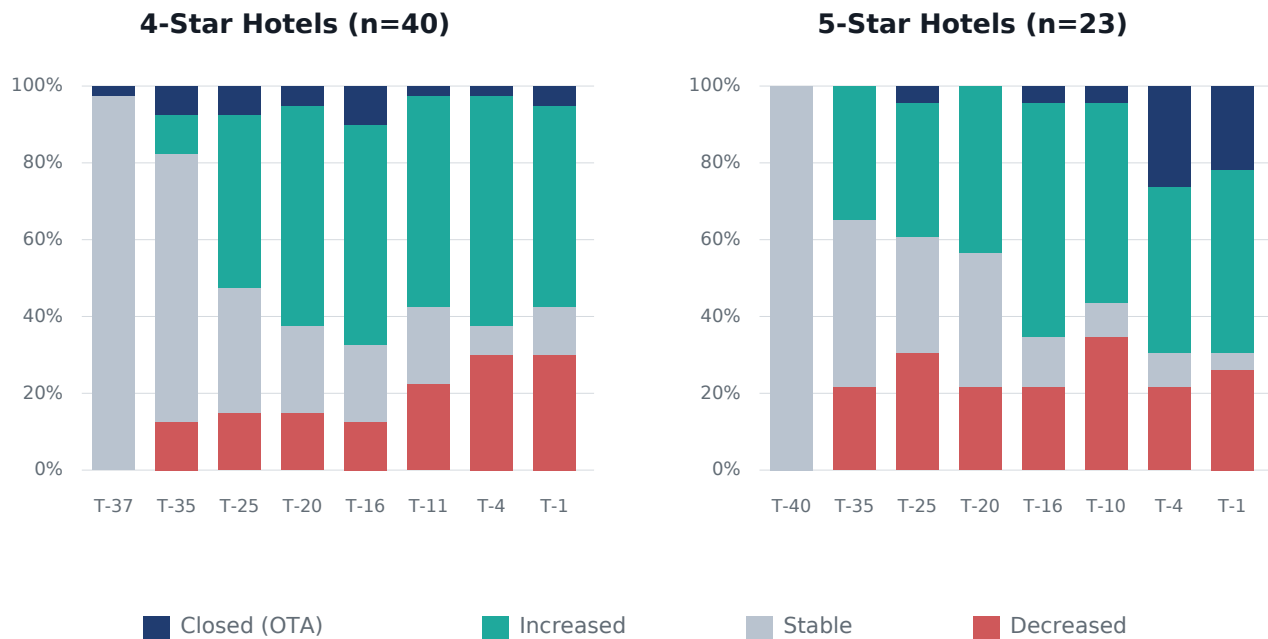
Final quoted rates moderated on 22 October compared with 20-21 October, but they remained above those for 19 October. The four-star average was EUR 210.5 (+4.0% from its first quote) and the five-star average was EUR 378.0 (+9.6%). The pattern is better described as post-peak moderation than a complete return to baseline.



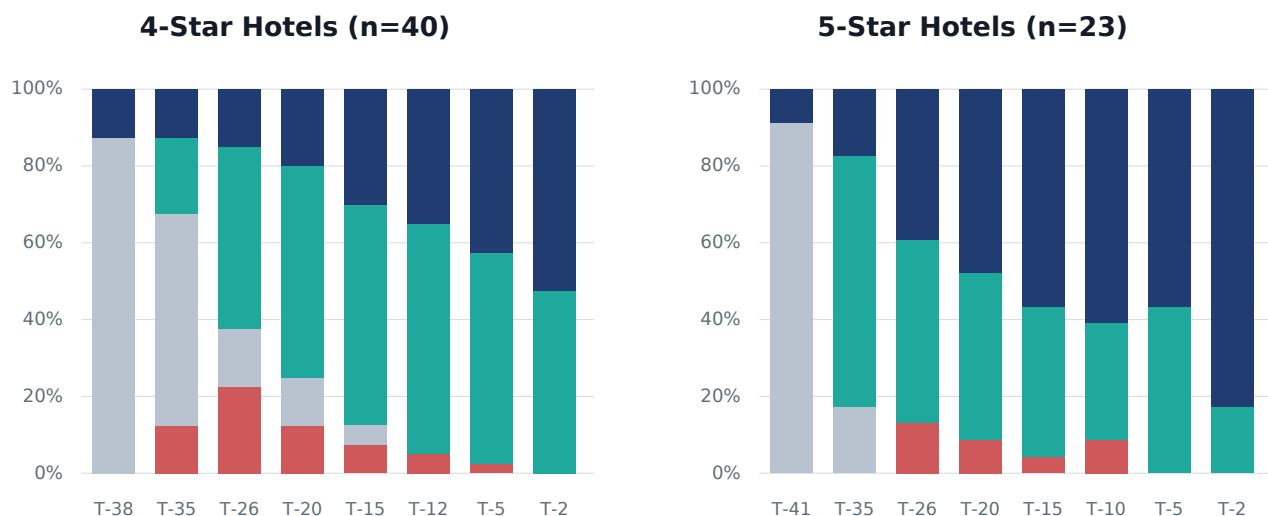
Yield Management & OTA Availability

PRICE STATUS VS FIRST AVAILABLE QUOTE (19 & 20 OCT)

CHECK-IN: 19 OCTOBER 2026



CHECK-IN: 20 OCTOBER 2026



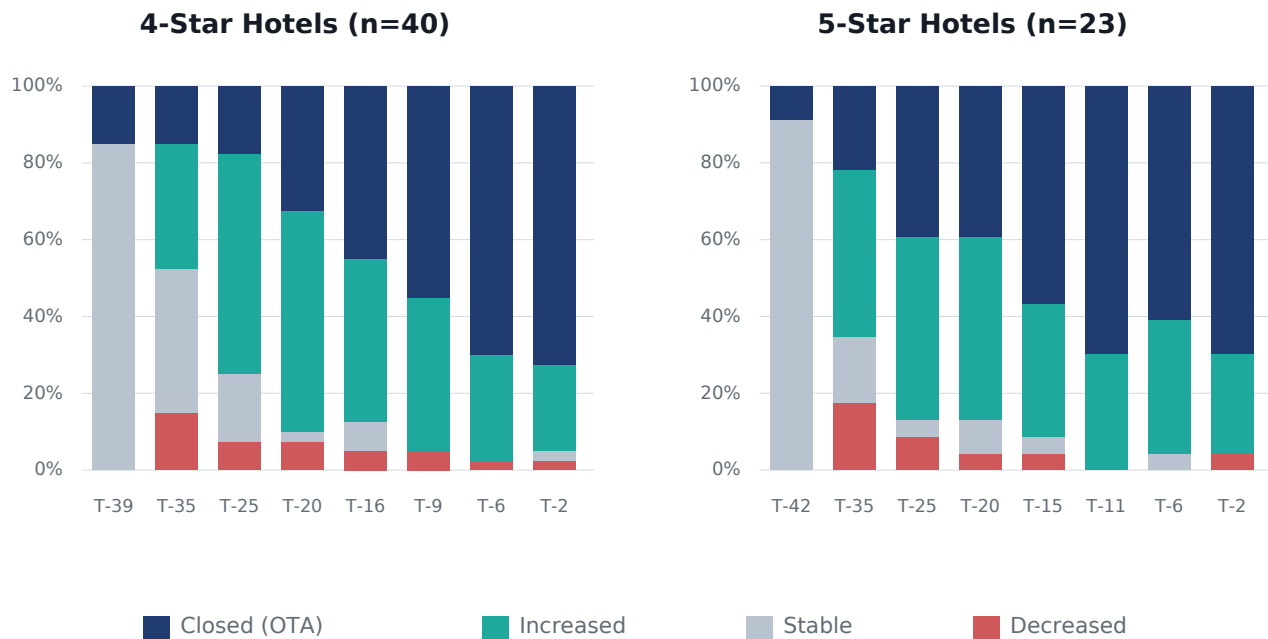
Each hotel's advertised rate is compared with its own first available numerical quote for that stay date. A change from -EUR 3 to +EUR 3 counts as Stable; larger differences are Decreased or Increased.

'Closed' means no bookable offer was shown on the observed OTA, not confirmed hotel sell-out. At T-2 for 20 October, 21 of 40 four-star and 19 of 23 five-star hotels were closed on the observed OTA. Every bar represents 100% of its tracked hotel sample.

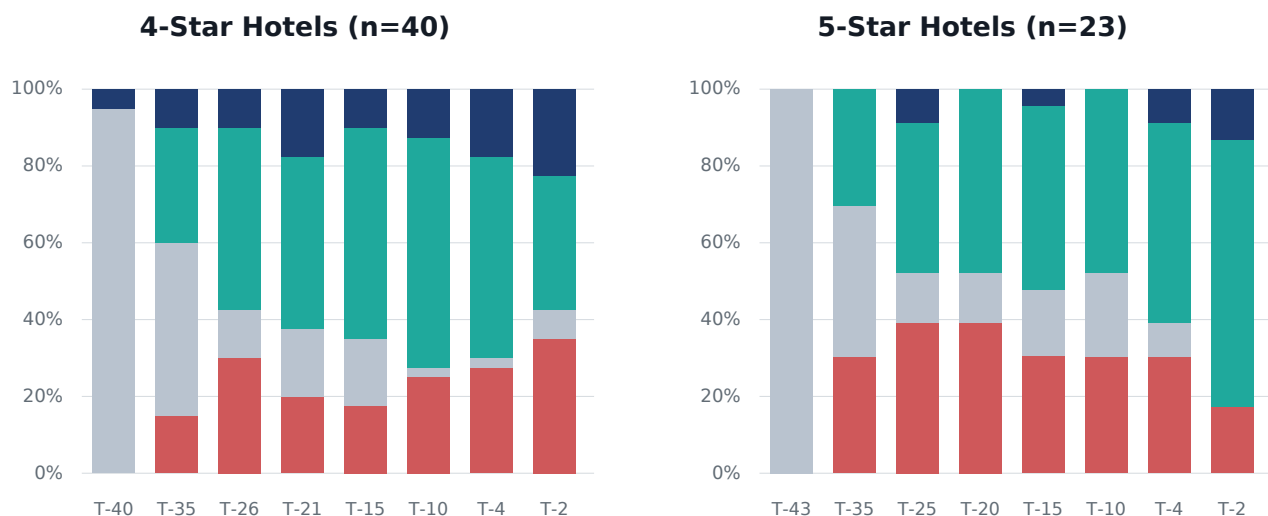
Yield Management & OTA Availability

PRICE STATUS VS FIRST AVAILABLE QUOTE (21 & 22 OCT)

CHECK-IN: 21 OCTOBER 2026



CHECK-IN: 22 OCTOBER 2026



At T-2 for 21 October, 29 of 40 four-star and 16 of 23 five-star hotels showed no bookable offer on the sampled OTA. For 22 October, the corresponding counts were 9 and 3. These values describe OTA availability, not independently verified occupancy.

The x-axis gives each checkpoint's actual days before check-in. Snapshots were selected from the nearest recorded observation dates, so the first T value and later gaps differ across panels. All quoted prices use the same breakfast and cancellation conditions.