



Hotel Performance Tracker

53rd Online Forum for Hoteliers

February 2023

BENCHMARKING FOR PROFIT

HOTSTATS

Hospitality Intelligence



10,000+
Hotels Worldwide



400+
Data Providers



135
Countries



500+
KPI's

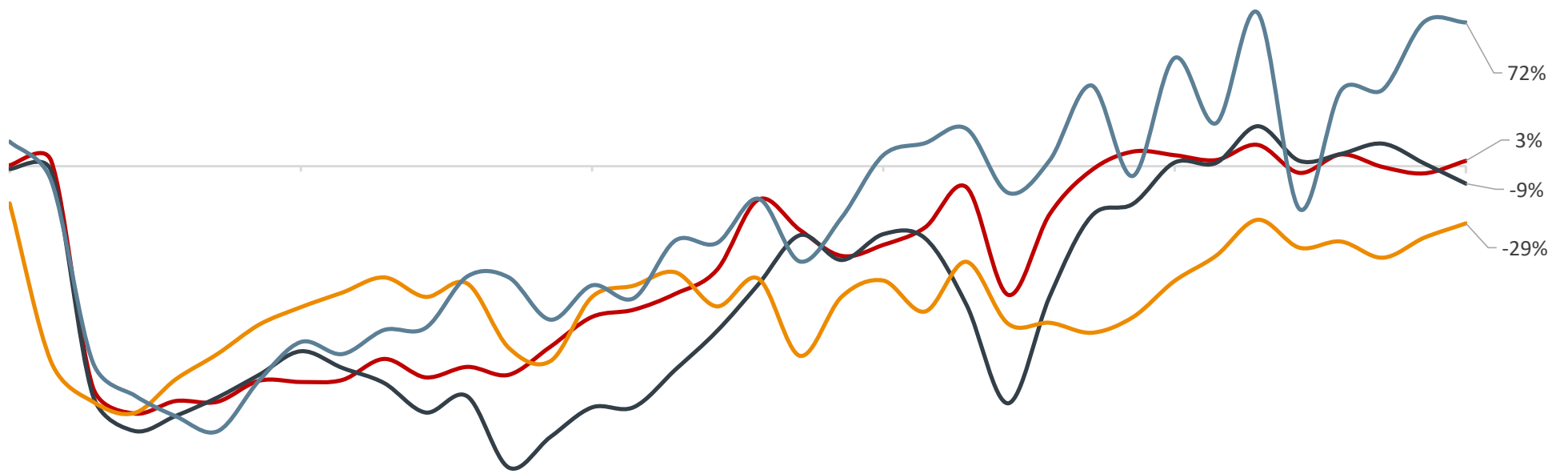
“Without data you are just another person with an opinion” William E Deming

That Recovery Graph

Month to Month Index vs 2019 – GOP Per Available Room

Jan-20

Dec-22



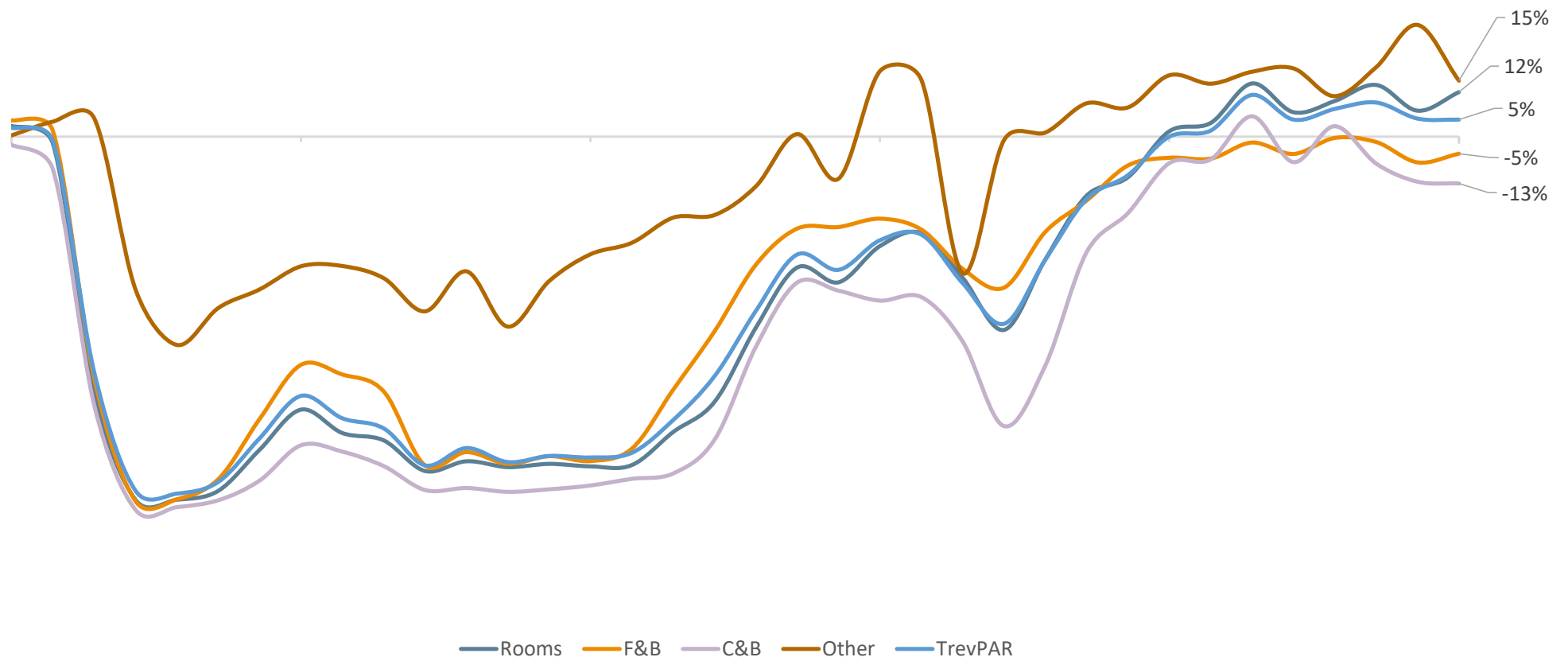
— United States — Europe — APAC — Middle East

The Recovery Position

Month to Month Index vs 2019 – Revenue Per Available Room – Europe

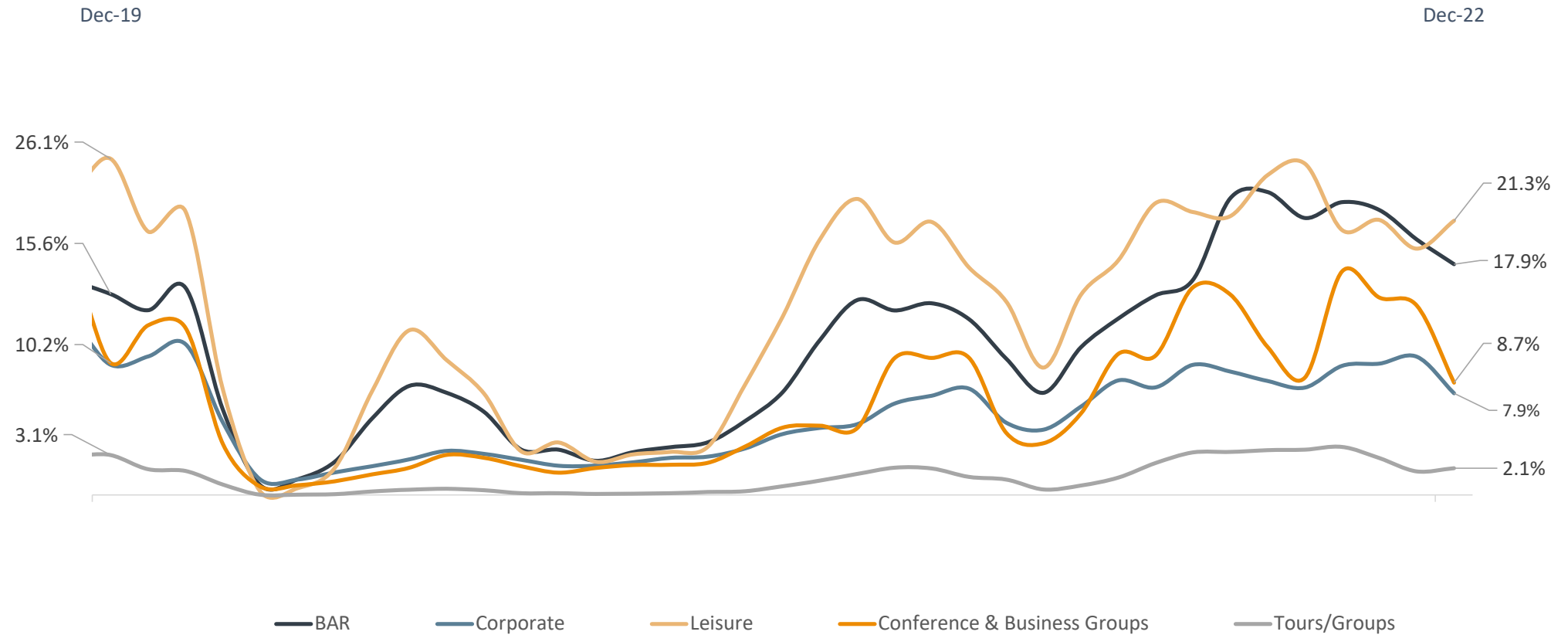
Jan-20

Dec-22



Bleisure, Workation.....next?

Occupancy by Segment – Europe

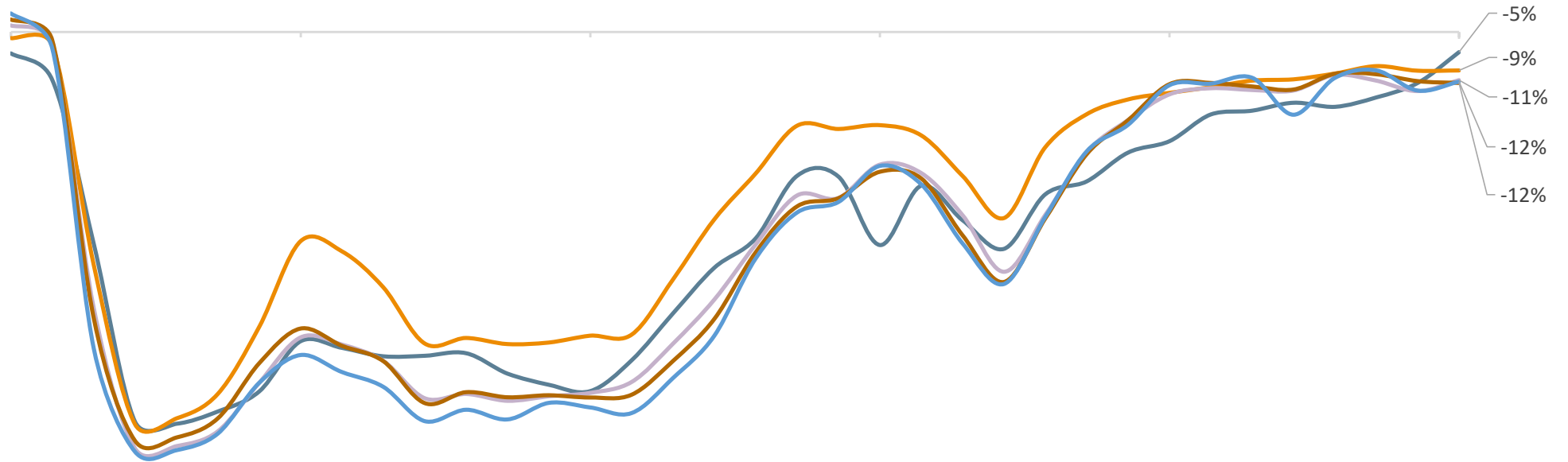


That Recovery Graph

Month to Month Index vs 2019 – Occupancy – Europe

Jan-20

Dec-22



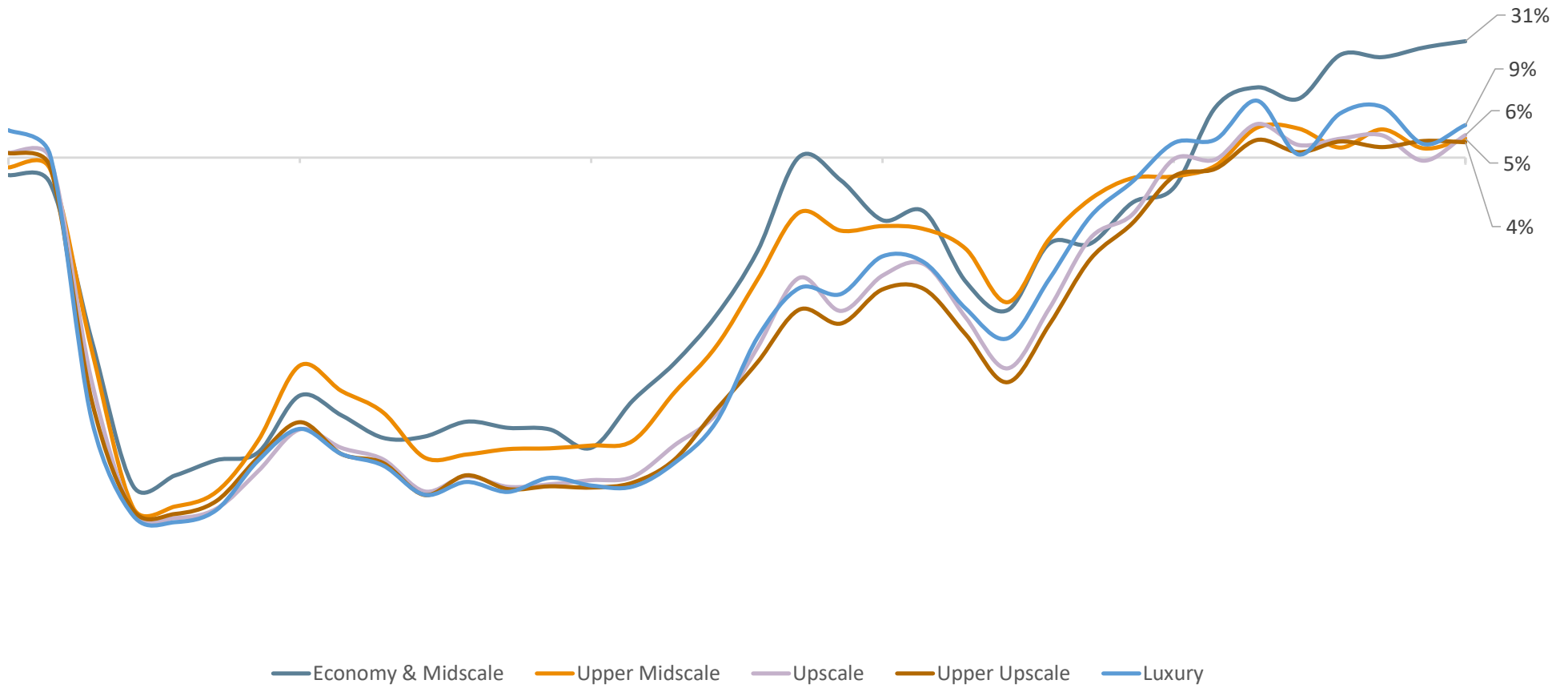
— Economy & Midscale — Upper Midscale — Upscale — Upper Upscale — Luxury

Midscale Leading the Way

Month to Month Index vs 2019 – Total Revenue Per Available Room – Europe

Jan-20

Dec-22

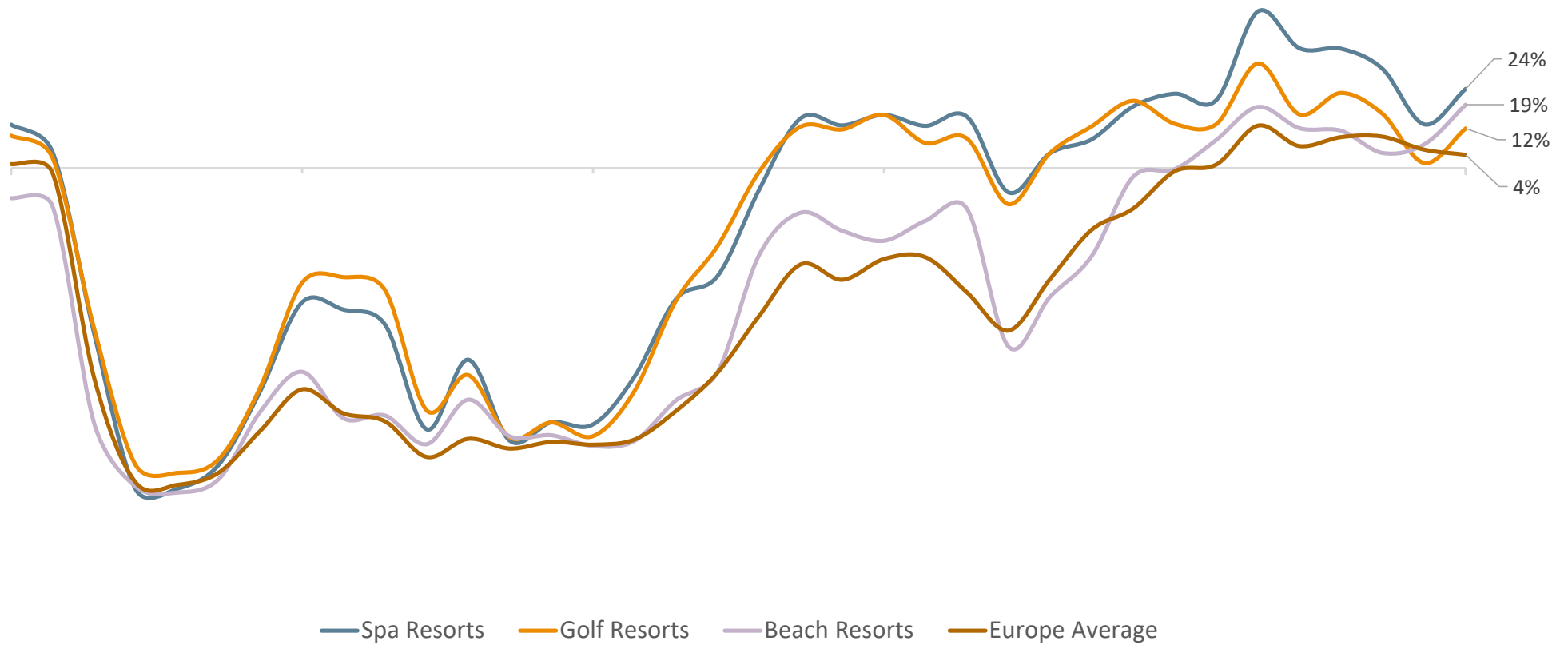


Resorting to Nature

Month to Month Index vs 2019 – Total Revenue Per Available Room – Europe

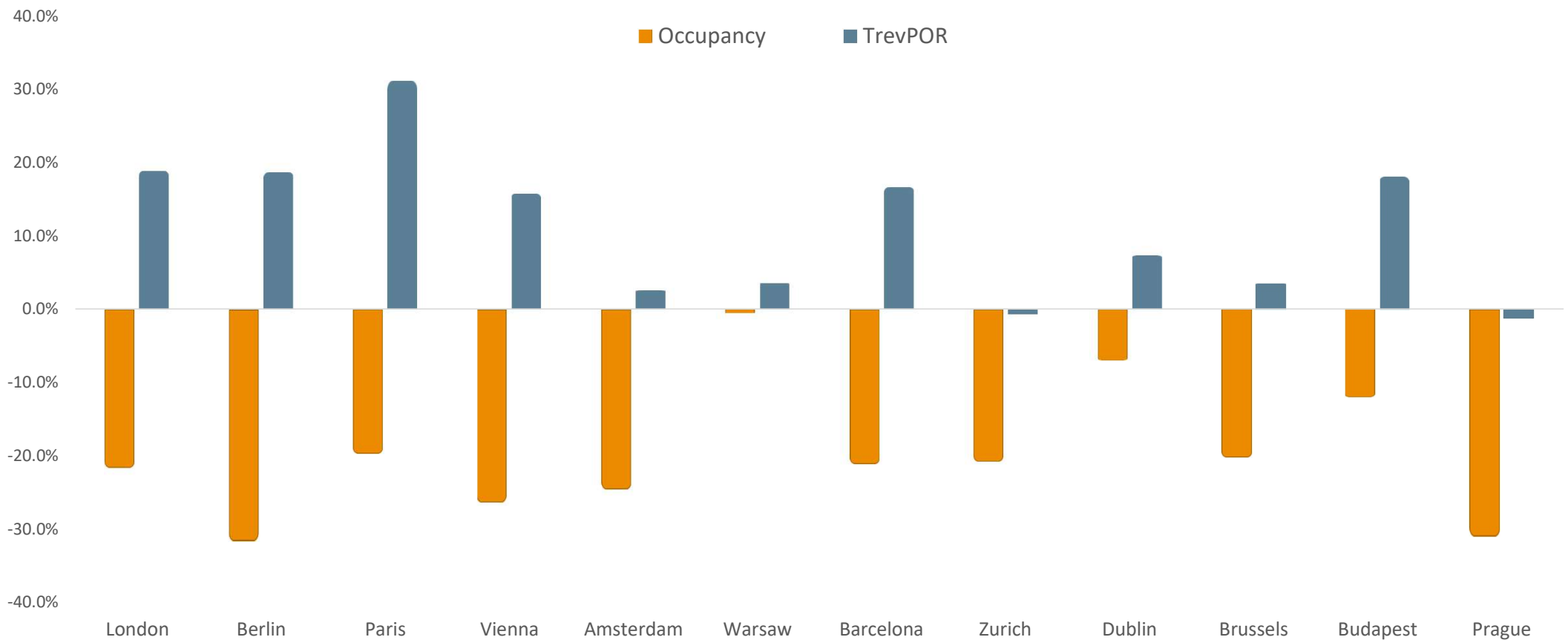
Jan-20

Dec-22



Occupancy Challenge / Rate Gain

% Change – YTD 2022 vs YTD 2019

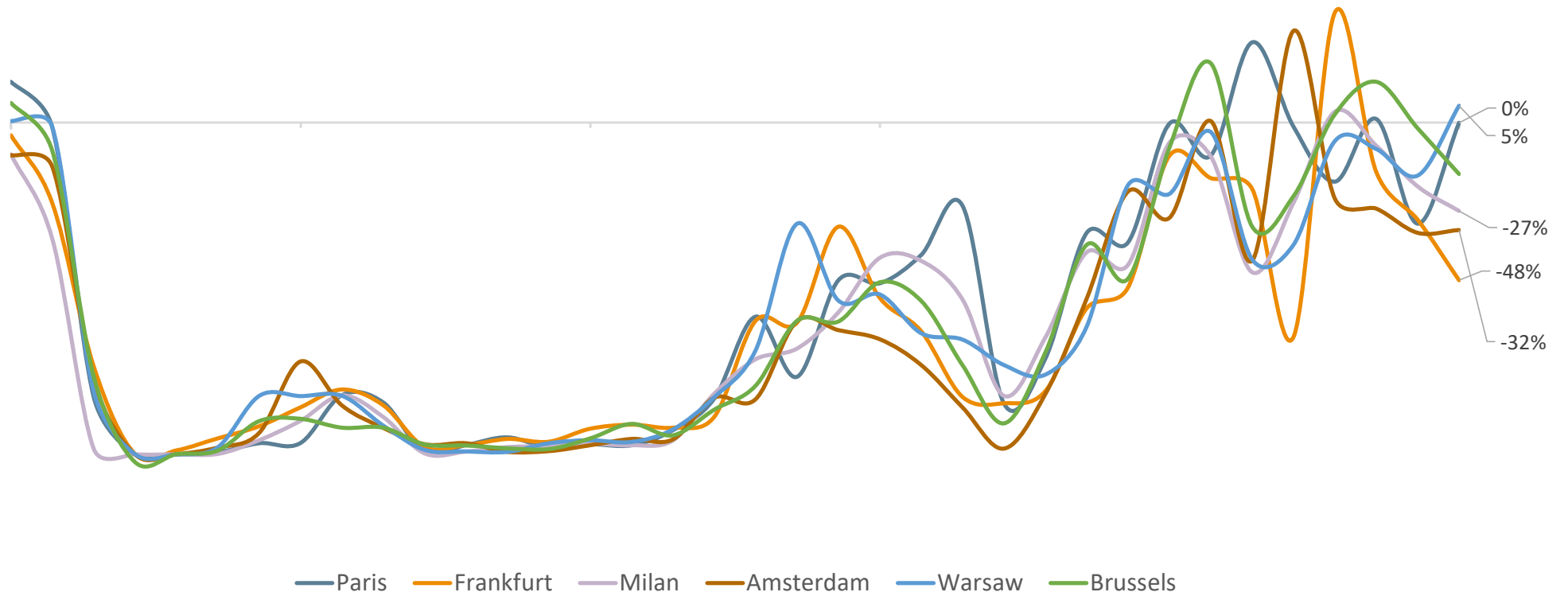


Now you C&B me..

Month to Month Index vs 2019 – C&B Revenue per m2

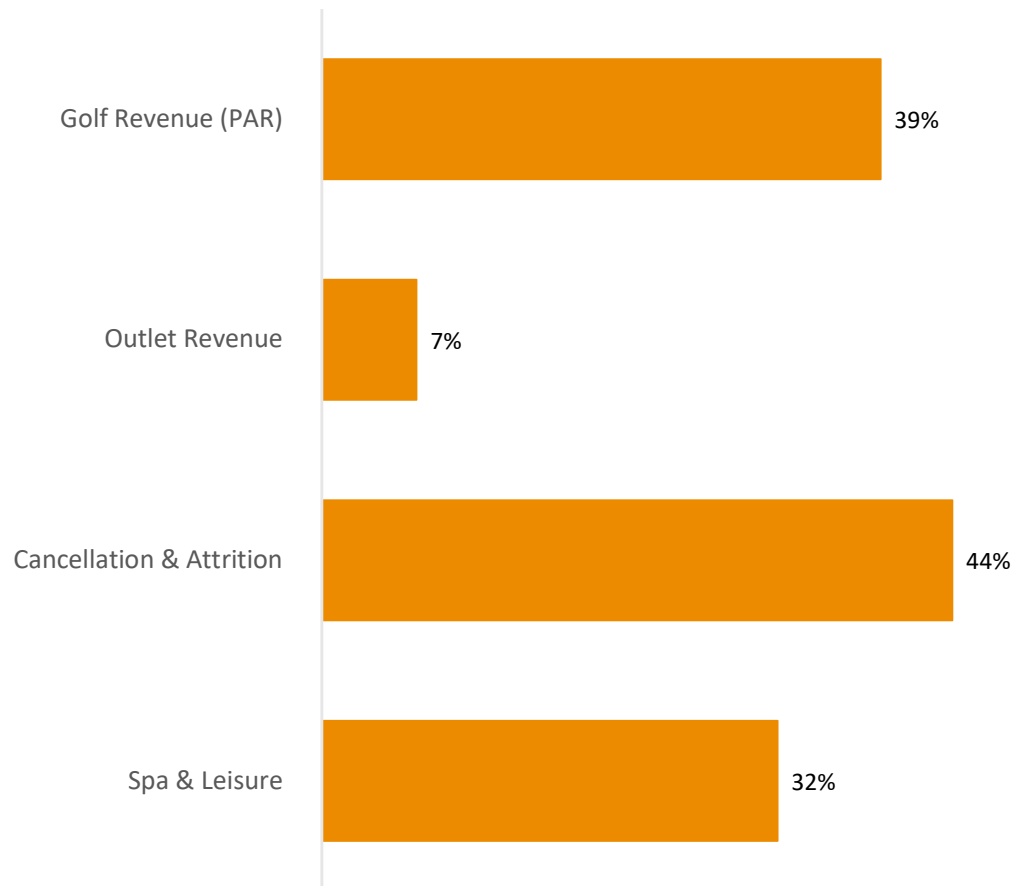
Jan-20

Dec-22



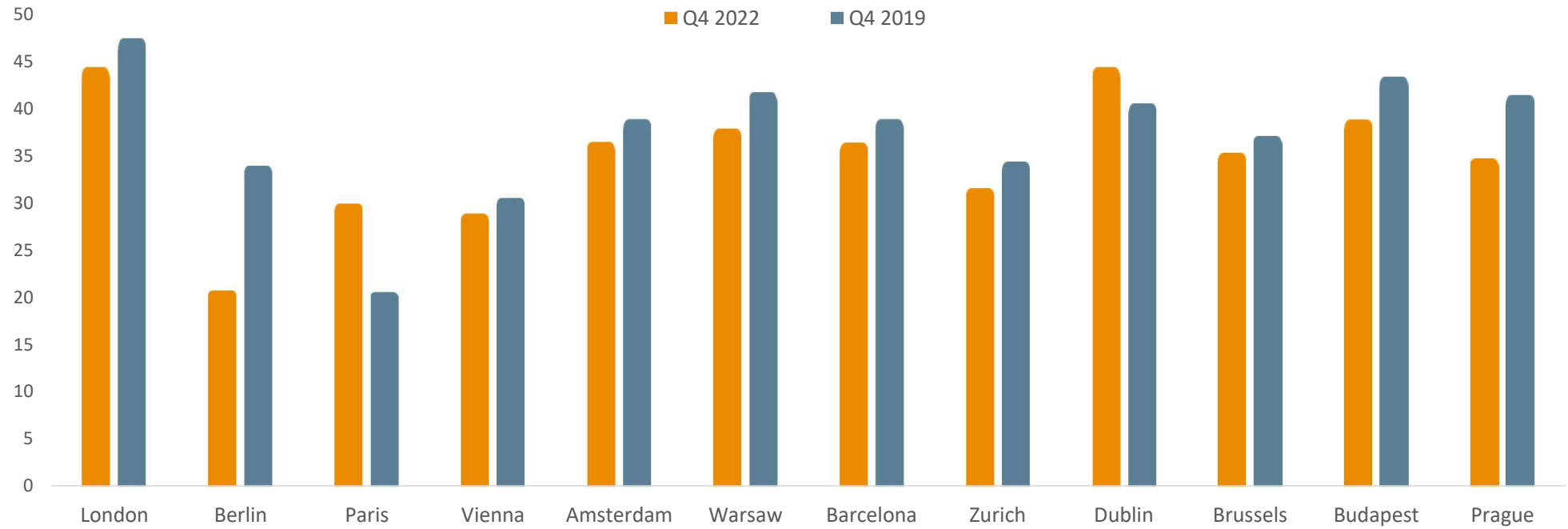
Ancillary Revenues

% Change POR – 2022 vs 2019 – Europe



The Margins

GOP Margin by Region

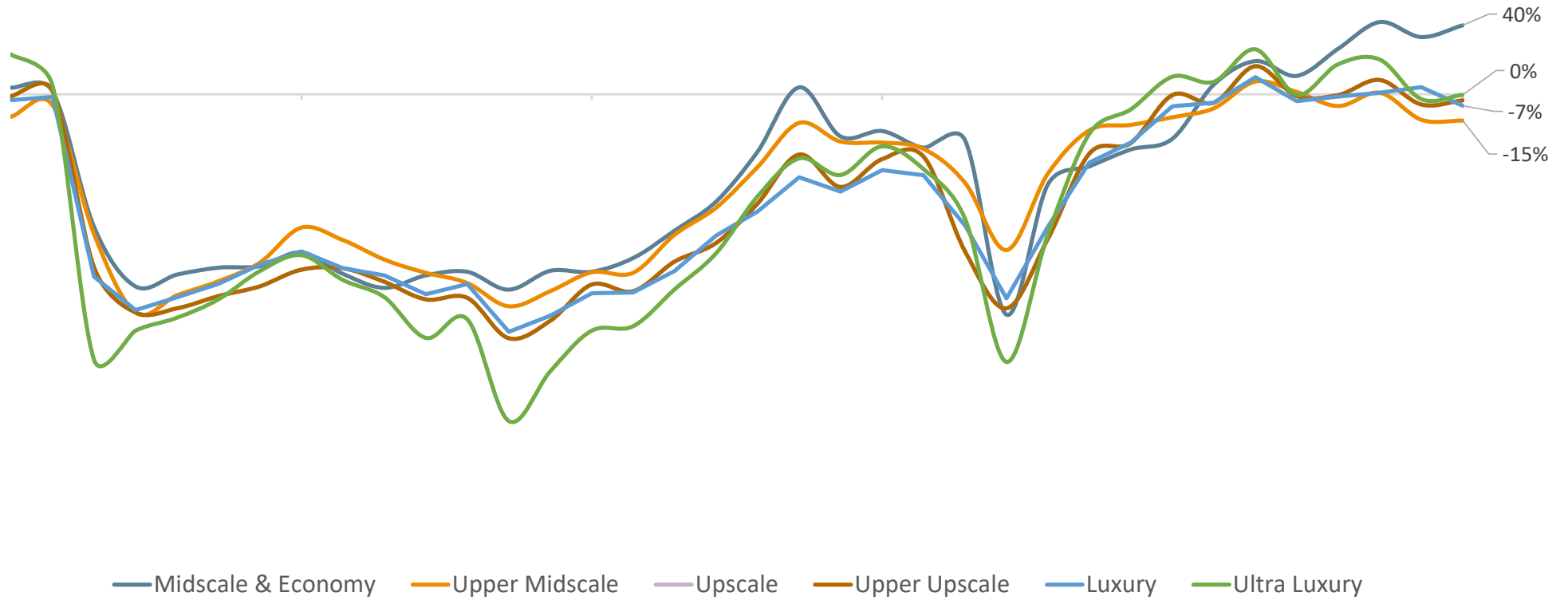


Efficiency Pays Off

Month to Month Index vs 2019 – GOP Per Available Room – Europe

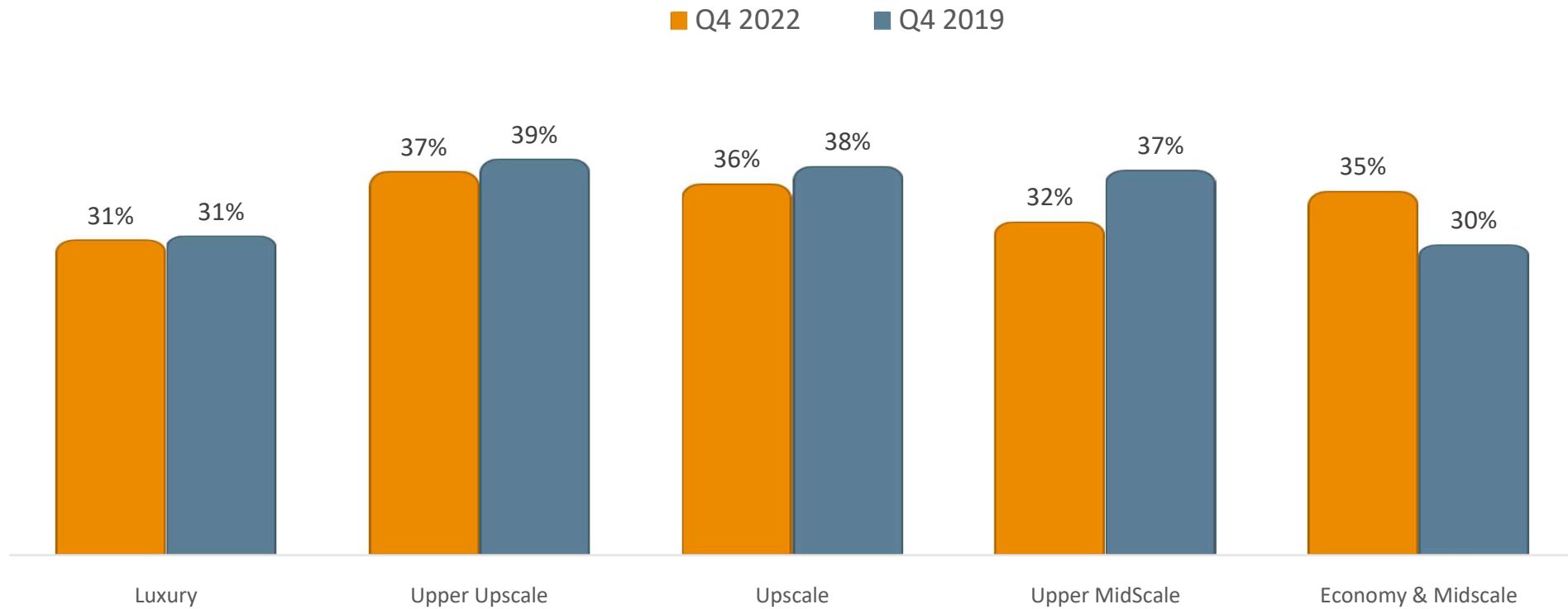
Jan-20

Dec-22



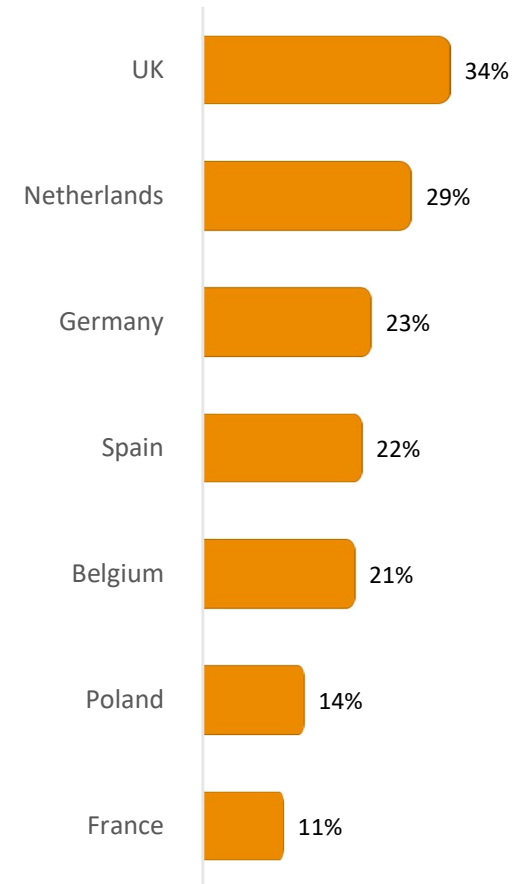
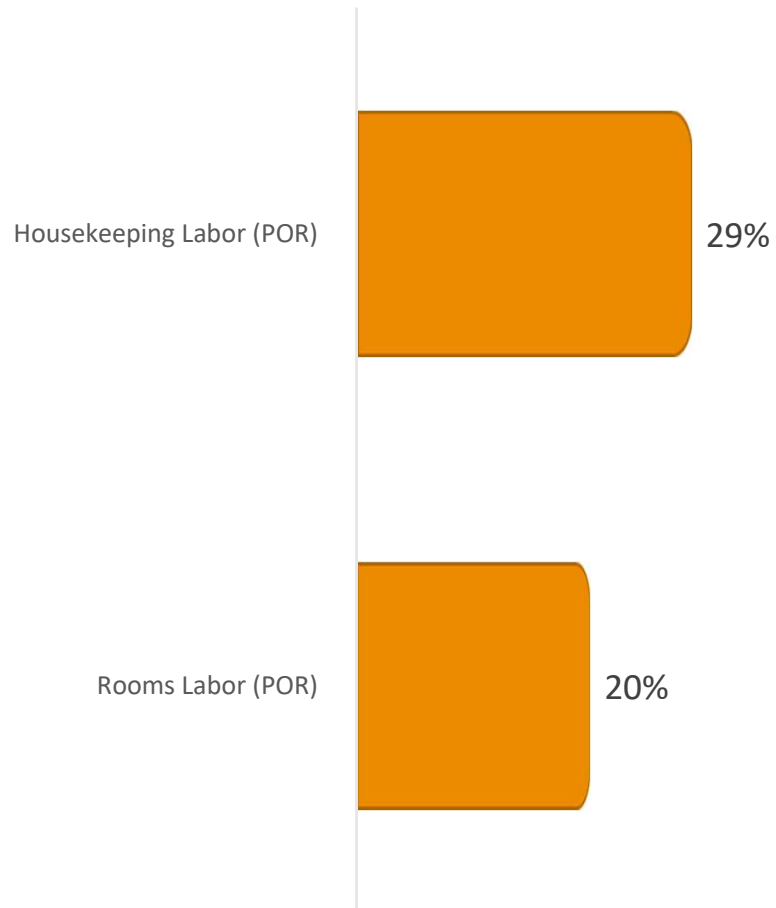
The Margins

Gross Operating Profit Margin – Europe



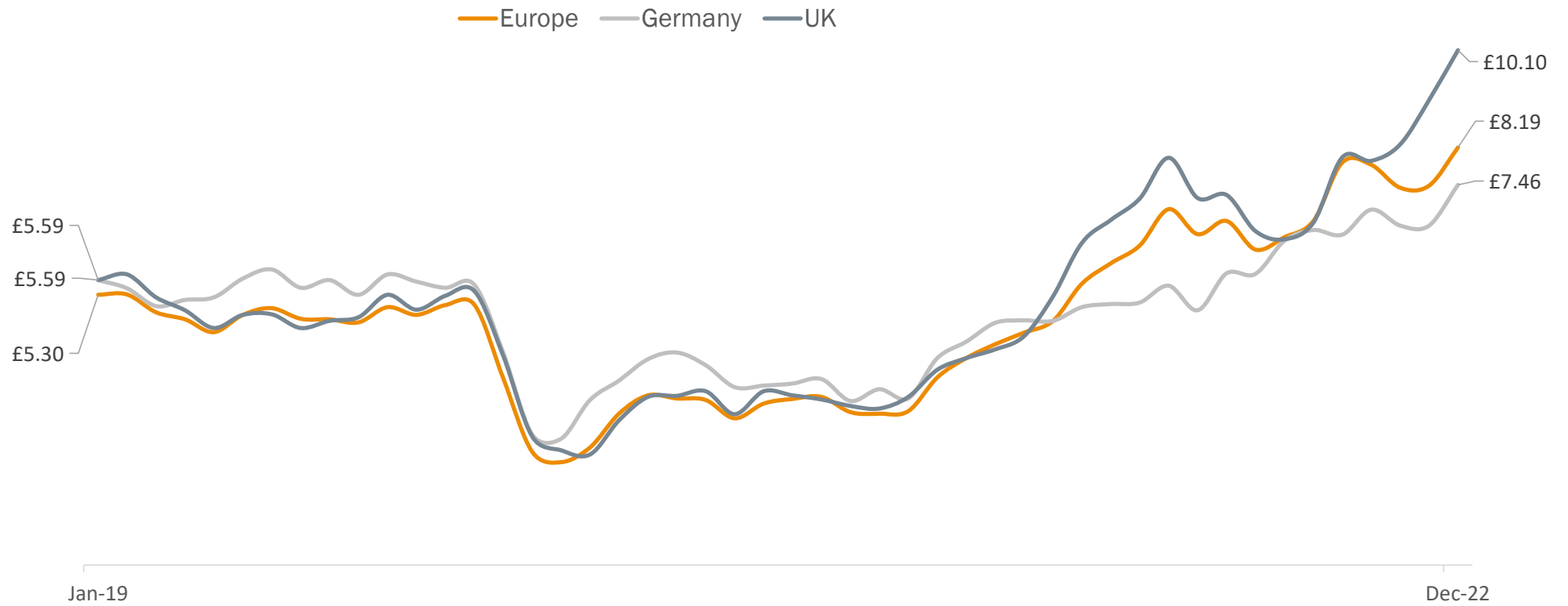
Key Labour Trends

2022 vs 2019 – Europe



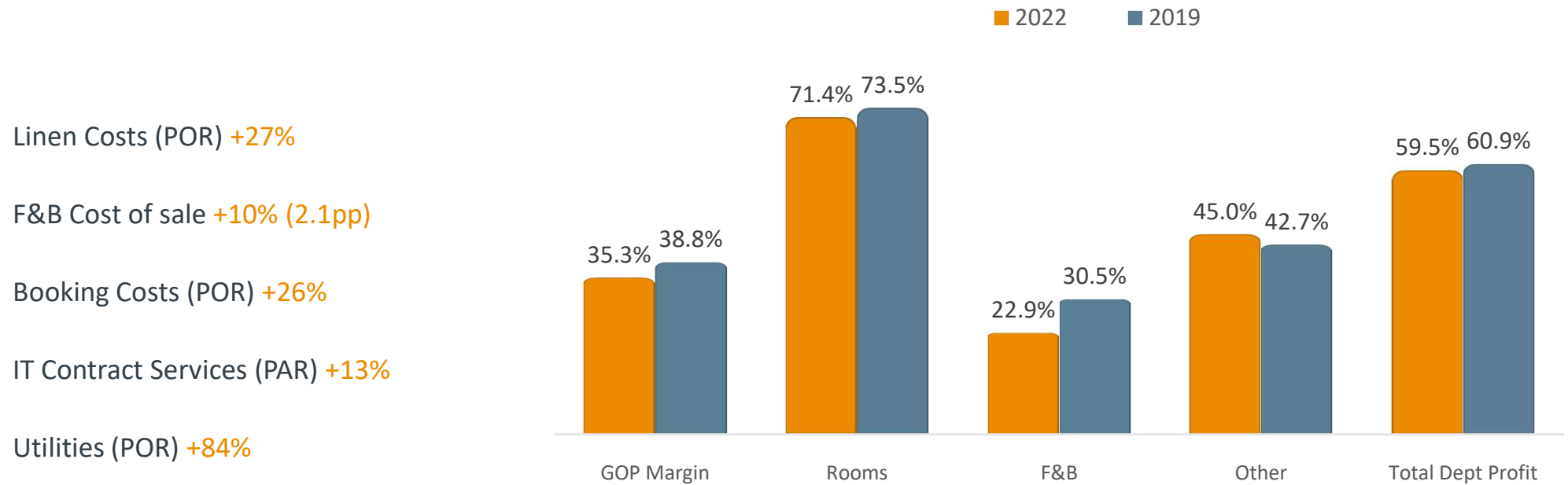
Winter is Coming...

Total Utilities Per Available Room



Key Expense Trends

2022 vs 2019 – United Kingdom



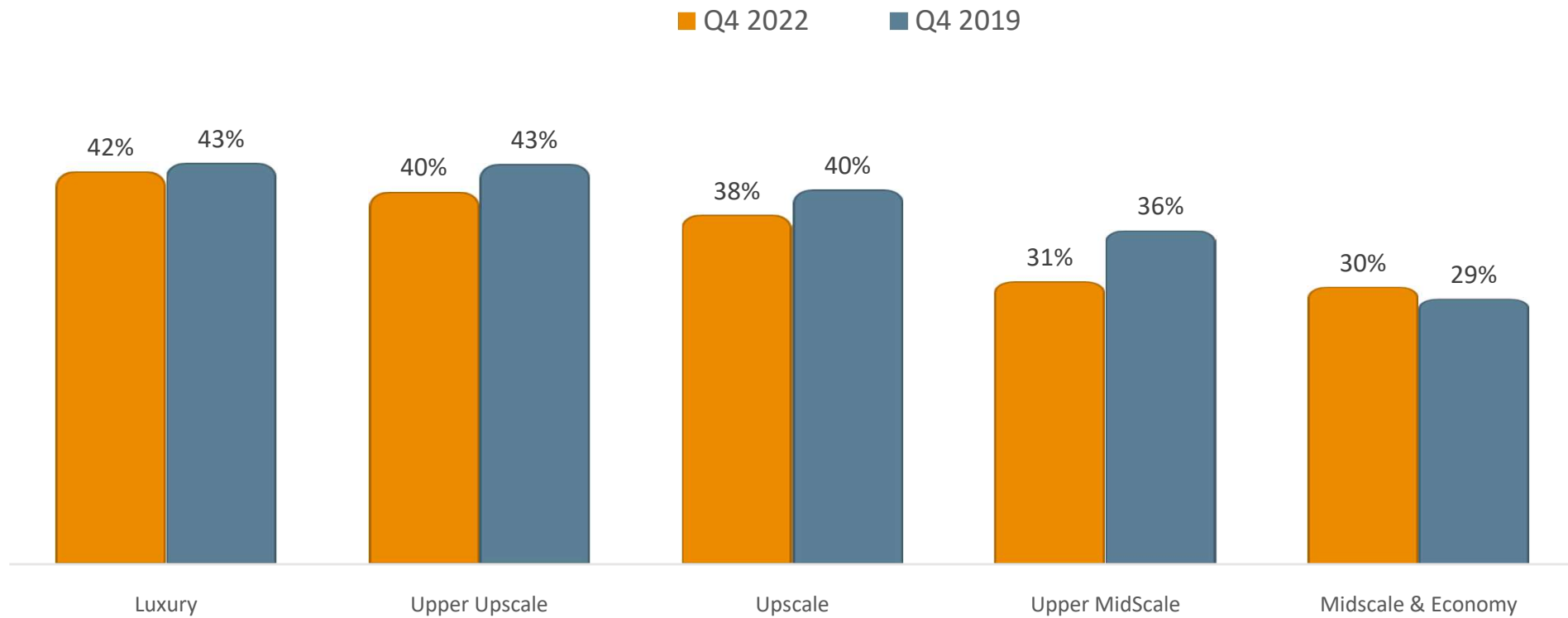
Costly Exercise

Cost Per Occupied Room – United Kingdom

	2022	2019
Booking Costs	11.63	9.25
Housekeeping	7.71	5.75
Rooms Exp	9.2	7.53
Credit Card Commission	2.96	2.77
Utilities	11.79	6.42
	43.29	31.72

The Margins

Gross Operating Profit Margin – United Kingdom



Key Takeaways

- Big impact of cost increases across the board but higher rates and control of variables appears to be working across the board especially in Midscale and Economy.
- Middle East hotels well ahead of 2019 levels due to high demand, strong ADR and low impact on cost lines – Expect the region to see negative profit performance vs 2022.
- Seasonal Hotels more resilient in low months due to lower fixed costs – Expect this to be a feature in 2023 for resort locations
- Q1 performance expected to be strong year on year, but hampered by full year of high energy pricing and cost inflation
- European resort locations expected to see a strong 2023 summer
- UK Profit margin set to fall further 2-3 pps

Question Time...

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