The Hotelier

Pulse Report

DEPARTURES ↑

N.17 SEPTEMBER 2021

GREAT HOTELS OF THE WORLD

guestcentric

Editor's Note

Pedro Colaco

It's back to business, and we've returned with the 17th Edition of The Hotelier PULSE Report. To those of you who have taken a break this summer, I hope you have returned refreshed and energized for some exciting months ahead in our industry.

Despite a rocky start to the summer in Europe, I'm pleased to report that our August 2021 survey results reveal a positive shift in sentiment across the hotel industry. The majority of Hoteliers surveyed met or exceeded the monthly occupancy forecast for August 2021, and also expect to significantly increase revenue (by as much as 50%) in 2021 vs 2020.

As vaccinations accelerate and governments start to reopen their economies, our survey results also indicate Hoteliers seem to be cautiously optimistic that revenge travel may still happen in the remaining months of this year. Our market trends analysis also reveals consistent month-to-month growth in international hotel bookings, outperforming the domestic market.

Hotel stays are steadily growing to pre-pandemic levels. Notably, although overall stays have yet to reach this benchmark, the direct channel is the only one to have exceeded 2019 levels in August 2021. Therefore, it's unsurprising that the majority of Hoteliers surveyed want to focus efforts on establishing their direct channels as the top source of reservations in the future.

As Hoteliers embrace the concept of revenge travel on the horizon, focusing on staffing challenges and rethinking distribution partnerships, we understand that some of the pandemic-centric issues we've previously addressed in this report will become less relevant to your business decision-making. We also understand you may also not have as much time to participate in a lengthy, complex survey each month going forward.

Thus, we have launched a new, simplified monthly Hotel Business Barometer to ensure you stay informed of crucial market trends and industry sentiments on the go! As part of this relaunch, I am personally inviting Hoteliers to, on an ongoing basis, ask me any questions they may have in relation to the current market trends best practices to implement for business growth.

Please send me your questions in our latest survey here:

Go To Survey →

Sincerely,

Pedro Colaco,
CEO of Guestcentric & GHOTW
Editor of The Hotelier PULSE Report

Table of Content

August 2021 Edition Key Takeaways

1.0

Market Trends

• Hotel Direct Stays in August 2021 represented more than **118%** of those in 2019.

• International hotel bookings now represent **61.0%** of overall bookings.

• In August 2021, mobile bookings represented **28.0%** of total bookings.

2.1

Occupancy Expectation & Hotel Business Status

• Over **91.0%** of properties surveyed in August 2021 are now open and operational.

• In August 2021, **55.6%** of Hoteliers expected to meet or exceed the average occupancy forecast.

• City Center Hotels & Resorts expect higher occupancy levels in September vs August 2021.

2.2

Financial Recovery Forecast

• The majority (**64.0%**) of hotels surveyed in August 2021 now expect to increase revenue in 2021 vs 2020.

• Most Hoteliers surveyed now expect to financially recover to 2019 levels in 2021 or 2022.

• The majority of City Center Hotels and Resorts now expect to increase revenue in 2021 vs 2020, yet Bed & Breakfasts largely now expect their revenue to decline.

2.3

Sales & Marketing Concerns, Priorities & Strategies in the Next 12 Months

• The majority of Hoteliers surveyed in August 2021 are continuing to establish their direct channels as the top source of reservations in the future.

• Despite increasing international bookings (*see Market Trends chapter above), the majority of Hoteliers still expect domestic and leisure travel to be the main contributors to recovery.

• Curiously, most Bed & Breakfasts surveyed expect International Leisure and Domestic Business travel to significantly contribute to recovery.

2.4

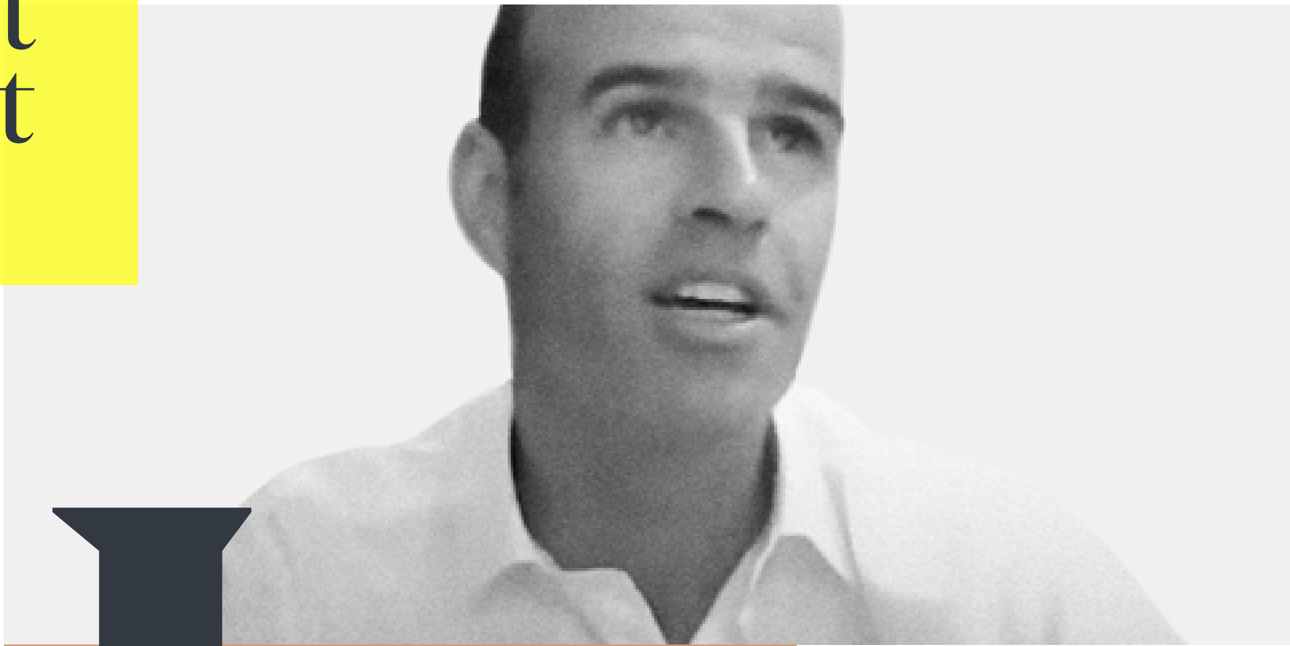
Guest Behavior and Hotel Expectations

• The majority of Hoteliers surveyed appear to cautiously expect that revenge travel may still occur in 2021.

• ADR, Marketing spend, and Hotel Direct Bookings are all forecasted to increase over the next 12 months.

• The level of vaccination per destination is expected to be of the highest significance to the uptick of meetings and events.

Spot light



João Pinto Coelho

Director of Sales & Commercial at Onyria Hotels & Resorts Group

Contrary to widespread industry expectations, cross-border travel has not resumed with a vengeance, due to unexpected restrictions at the start of summer 2021. But as destinations such as the UK continue to stay the course in reopening their economy, there is still cautious optimism that other destinations will follow suit and a vast majority of consumers will use the autumn of 2021 to travel.

In this month's Hotelier Spotlight Interview, we caught up with João Pinto Coelho, Director of Sales & Commercial at Onyria Hotels & Resorts Group to find out what he expects for the hotel industry in the second half of 2021, and how his business has adapted to continuous market changes.

How have the new variants disrupted consumer confidence and business operations across Onyria Resorts?

I think the disruption is not so much due to the variants themselves, but rather the communication around them by local governments. The result is that our reservations team is talking less about the rooms and products we offer, and answering more questions about safety and requirements to access our hotel and activities in destinations where we operate.

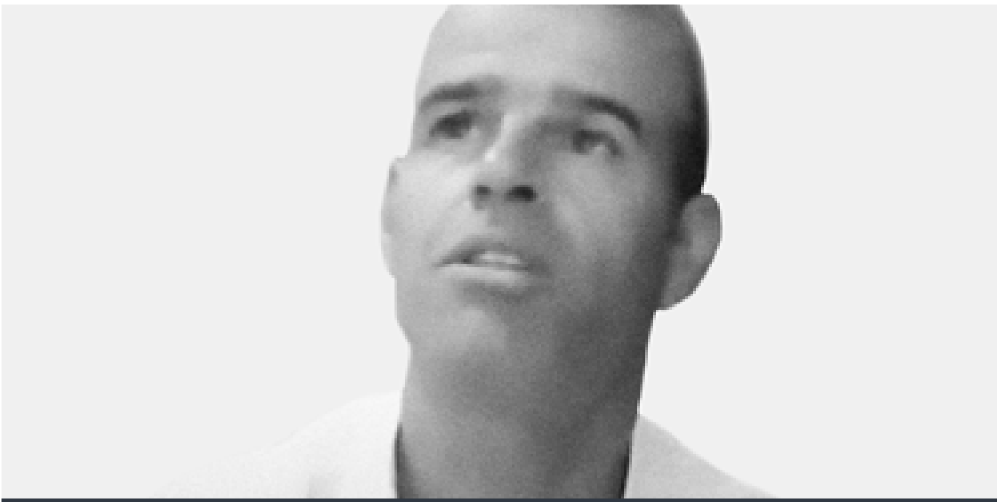
> “We're currently testing all-inclusive, holistic offers & packages.

What strategies has Onyria Hotels & Golf Resorts implemented to respond to current market disruptions and guest demands?

We have done some major refurbishments across our rooms and villas. We're also currently testing all-inclusive offers and packages to give guests a more holistic experience at our resorts. We've also introduced open-air concerts with more space to enjoy the vibe in a socially-distanced way. Throughout the implementation of these new measures, our strategy has been to continuously communicate with guests and show what we are doing.

As life continues to steadily return to normal, what are you looking forward to the most in a post-pandemic world?

I cannot wait for social distancing to become a concept of the past, and for us all as humans to be able to hug each other again. From an operational standpoint, we would love to go back to offering normal buffets without restrictions. Listening to a standing ovation at a big event or experiencing the rush of a concert at full capacity, are some other things I am looking forward to experiencing in a post-pandemic world.



About João Pinto Coelho

João Pinto Coelho boasts a long history as Director of Sales & Commercial at the Onyria Hotels & Resorts Group, a chain with properties and golf courses across Portugal's top tourism hotspots, including Cascais, metropolitan Lisbon, and the Algarve. Appointed as the Group's Director of Sales in 2004, he has contributed to a wide range of key projects for the group, including the opening of Onyria Palmares Beach House Hotel in the Algarve in 2016, and a large-scale renovation project during the first lockdown of 2020 for the Hotel Quinta da Marinha Golf Resort in his native Cascais.

> “From an operational standpoint, we would love to go back to offering normal buffets without restrictions.

Read the Full Interview Here.

1.0

MARKET TRENDS

Key Takeaways

01 Hotel Direct Stays in August 2021 represented more than 118% of those in 2019.

02 International hotel bookings now represent 61% of overall bookings.

03 In August 2021, mobile bookings represented 28% of total bookings.

Booking Behaviours in 2021

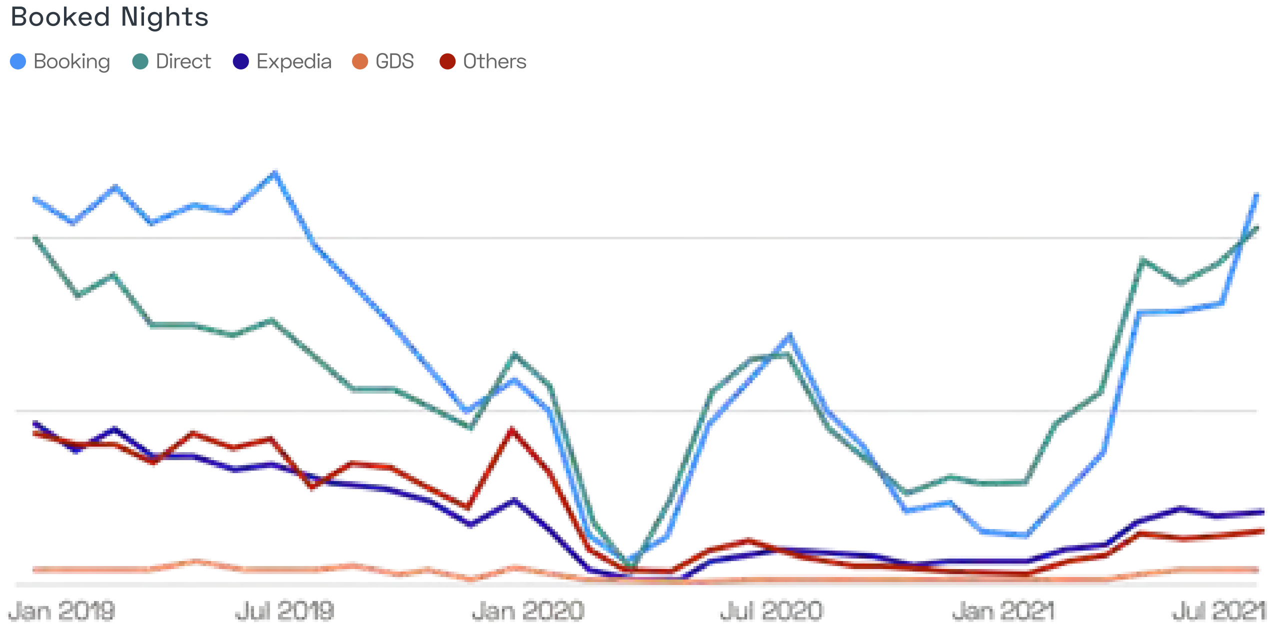
Our Market Trends analysis covers booking behaviour in 2021 year-to-date, in comparison to the same period in 2020.

We also cover the evolution of channel performance in 2021 vs 2020 and 2019, how each reservation channel is recovering, mobile reservations behavior, booking pace, Domestic vs International travel trends, and the latest world news that has impacted hotel bookings in recent weeks.

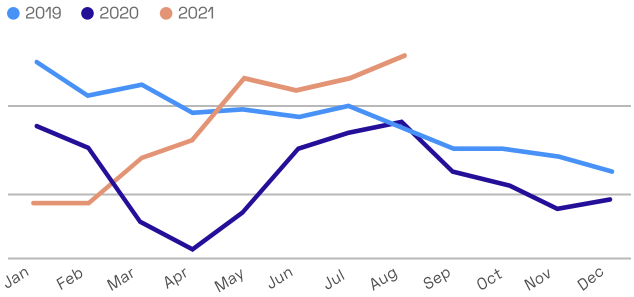
Analysing bookings and stays per channel from January to August 2021, the graphs below show how each of the 5 main channels performed.

These channels are:

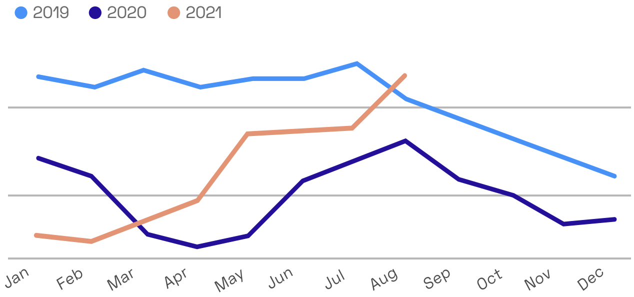
1. Direct
2. Booking
3. Expedia
4. GDS
5. Others



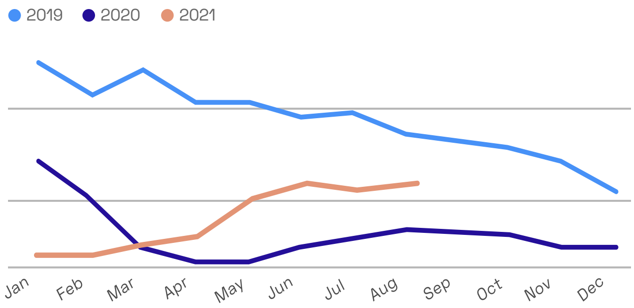
Booked Nights - Direct



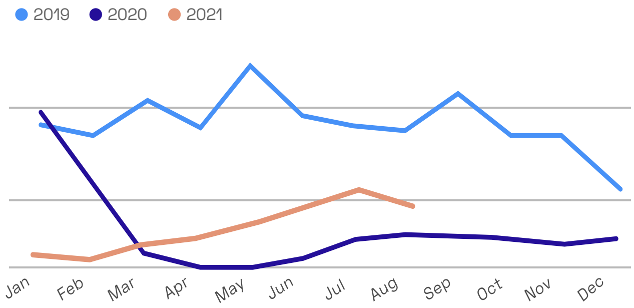
Booked Nights - Booking



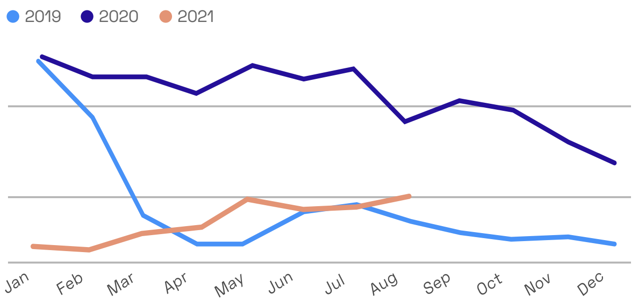
Booked Nights - Expedia



Booked Nights - GDS



Booked Nights - Others



In August 2021, booked nights across all channels reached **99.7%** of those over the same period in 2019. When compared to bookings over the same period in 2020, booked nights in August 2021 represented **156.7%**.

Below are the total booked nights for each channel by order of performance in August 2021 - compared to bookings over the same period in 2020 and 2019:

VS 2019
Direct: **153.6%**
Booking: **112.4%**
Expedia: **62.6%**
GDS: **50.0%**
Others: **4.1%**

VS 2020
Direct: **149.4%**
Booking: **158.8%**
Expedia: **220.8%**
GDS: **236.7%**
Others: **59.0%**

Showing the strongest performance against pre-pandemic levels, Direct bookings in August 2021 reached **153.6%** of those over the same period in 2019. In 2nd place, Booking is also registering better bookings results than in August 2019, selling **112.4%** of August 2019 nights. All other channels (including wholesalers etc) show a massive drop in bookings compared to pre-pandemic levels, generating just **4.1%** of 2019 nights sold in August 2021.

Stay Behaviours in 2021

In terms of Stays, the Direct Channel is the only one that exceeded 2019 levels in August 2021, generating over **118.0%** of stays over the same period in 2019. Below is the complete channel breakdown of stays generated in August 2021:

Direct:
August 2021 vs 2020: **137.0%**
August 2021 vs 2019: **118.3%**

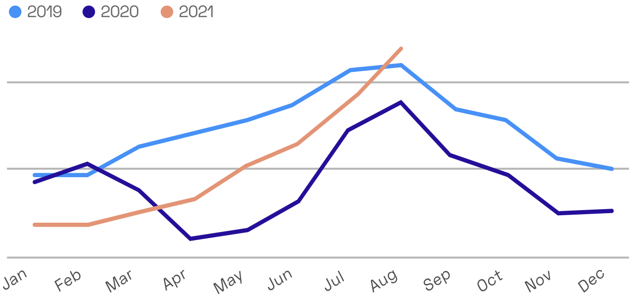
Booking:
August 2021 vs 2020: **127.6%**
August 2021 vs 2019: **70.9%**

Expedia
August 2021 vs 2020: **185.9%**
August 2021 vs 2019: **43.6%**

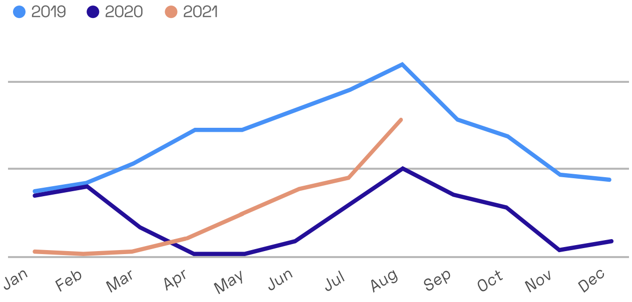
Others:
August 2021 vs 2020: **106.0%**
August 2021 vs 2019: **36.5%**

GDS:
August 2021 vs 2020: **172.6%**
August 2021 vs 2019: **46.2%**

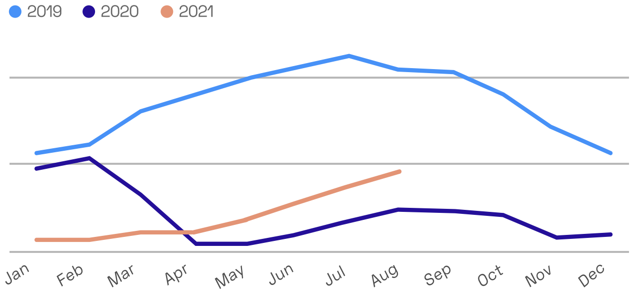
Stay Nights - Direct



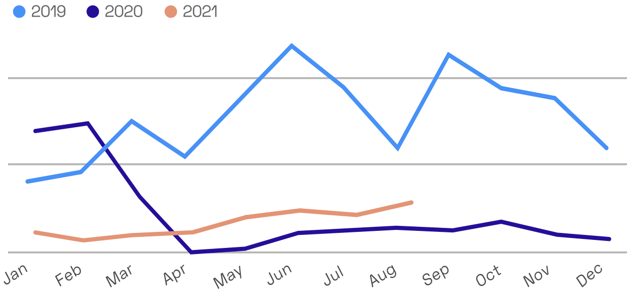
Stay Nights - Booking



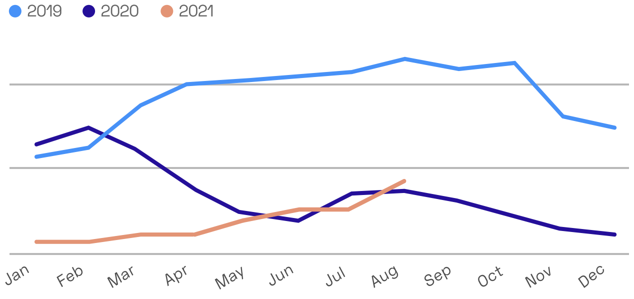
Stay Nights - Expedia



Stay Nights - GDS



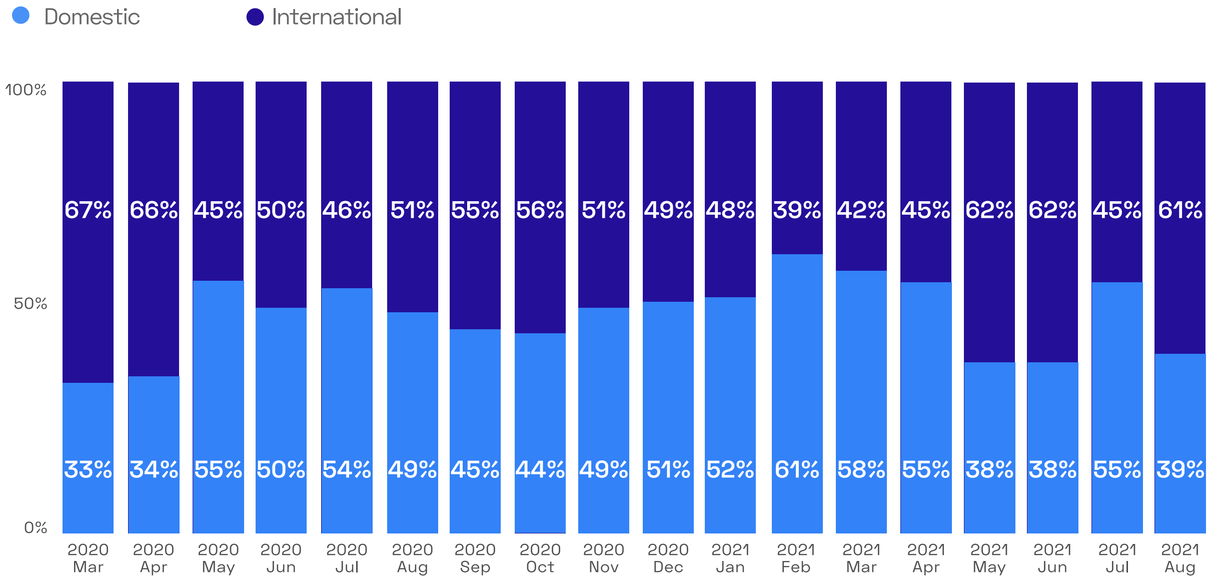
Stay Nights - Others



International Travel vs Domestic Travel in 2021

In August 2021, domestic bookings dropped to **39.0%** of total bookings. International bookings currently represent **61.0%** of total bookings.

International Travel vs Domestic Travel



Booking Pace

Although booking pace is still shorter than 2019, it has increased steadily since June 2021, against 2020 levels. Below is the overall booking pace breakdown in August 2021 vs 2020 and 2019:

Overall Booking Pace

August 2019 - **45 Days**
August 2020 - **26 Days**
August 2021 - **30 Days**

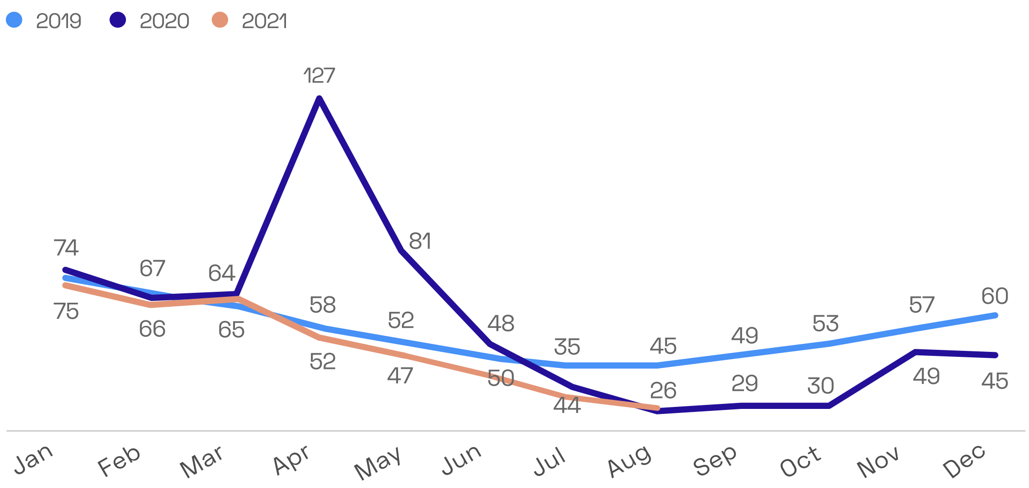
Domestic Booking Pace

August 2020 - **14 Days**
August 2021 - **22 Days**

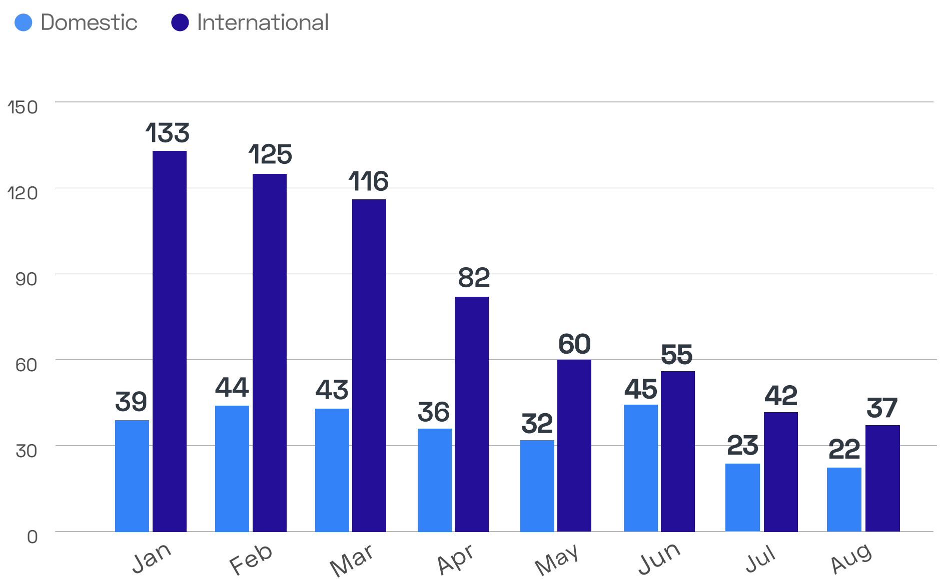
International Booking Pace

August 2020 - **14 Days**
August 2021 - **37 Days**

Booking Pace - Overall



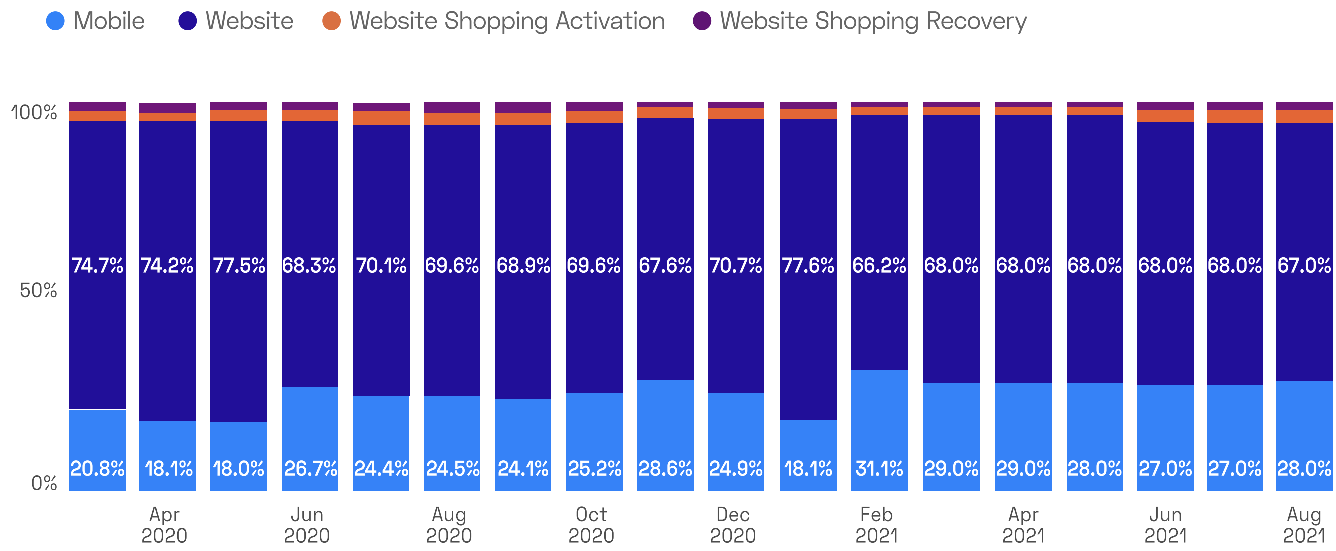
Booking Pace 2021 - Domestic vs International

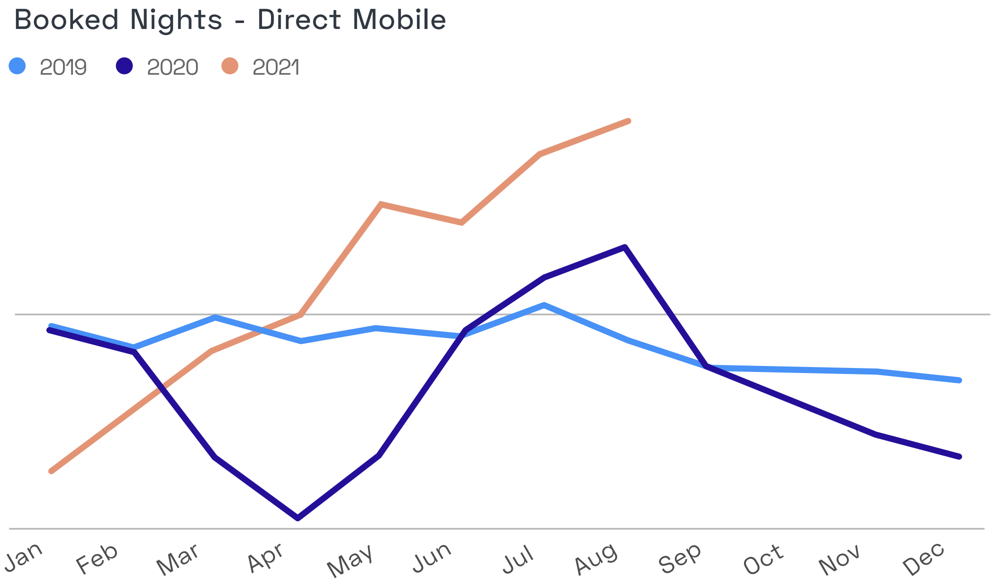


Mobile Booking Trends

Since January 2021, mobile bookings' importance has remained steady at **27.5%** of total bookings. In August they represented **28.0%** of total bookings, an increase of **10.0%** as compared to August 2019.

Direct Bookings





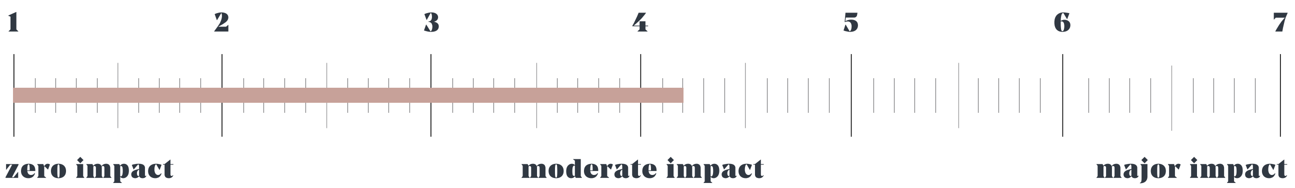
Mobile bookings are rising. When analysing the direct channel, there were over **49.0%** of mobile direct bookings in August 2020 vs 2019. In August 2021, there were over **119.0%** of mobile direct reservations than August 2019, and over **47.0%** up from August 2020.

1.1

QUESTION OF THE MONTH

In August 2021, we asked Hoteliers to rank, on a scale of 1 to 7, the degree to which they expect Google Hotel Free Booking links to impact their hotel bookings in the future.

4.2% Average Rating



Resorts show the strongest expectation in terms of how Google Hotel Free Booking Links will impact hotel bookings in the future, ranking **4.9** out of 7. City Center Hotels ranked 4 out 7, while Bed & Breakfasts ranked **3.8** out of 7.

2.1

OCCUPANCY EXPECTATIONS & HOTEL BUSINESS STATUS

Key Takeaways

01 In August 2021, 55.6% of Hoteliers expected to meet or exceed the average occupancy forecast.

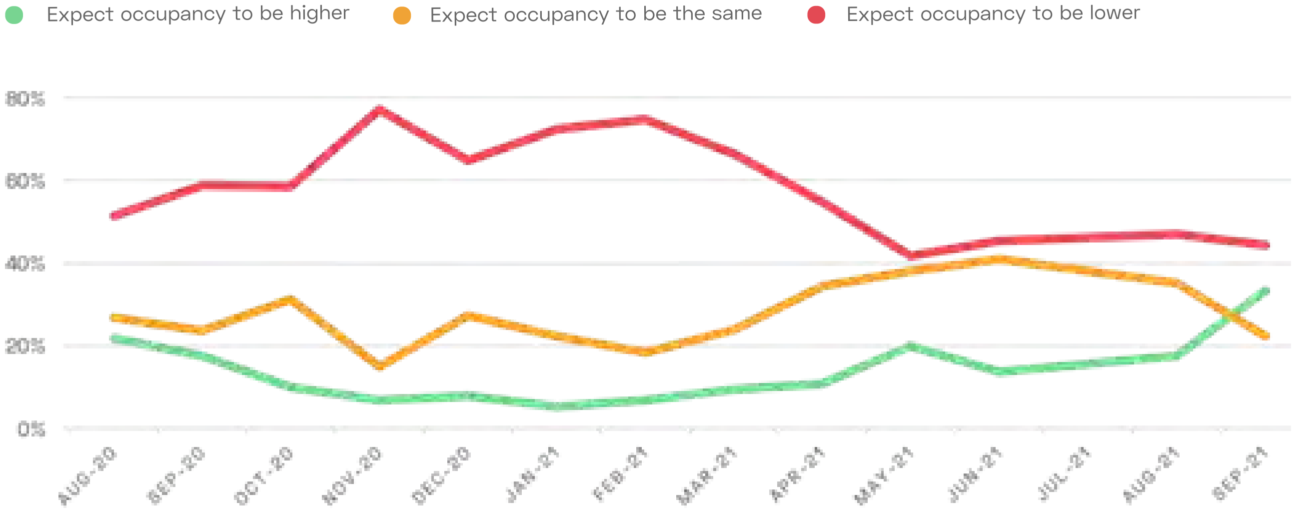
02 Over 91.0% of properties surveyed in August 2021 are now open and operational.

03 City Center Hotels & Resorts expect higher occupancy levels in September vs August 2021

Poll

Hoteliers we surveyed expected an average of **58.0%** occupancy in August. Do you expect your property to be below, the same, or above this expectation?

Occupancy Expectations



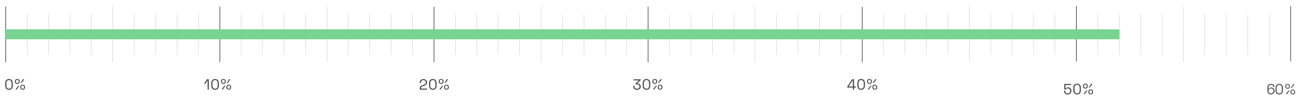
In August 2021, **5.6%** of Hoteliers expected to meet or exceed the average occupancy forecast for that month. However, **44.4%** of respondents did not expect to meet the monthly occupancy forecasted for August.

Of the property segments surveyed, **50.0%** of Bed & Breakfasts, **57.1%** of City Center Hotels, and **85.7%** of Resorts exceeded the industry's monthly occupancy forecast for August 2021.

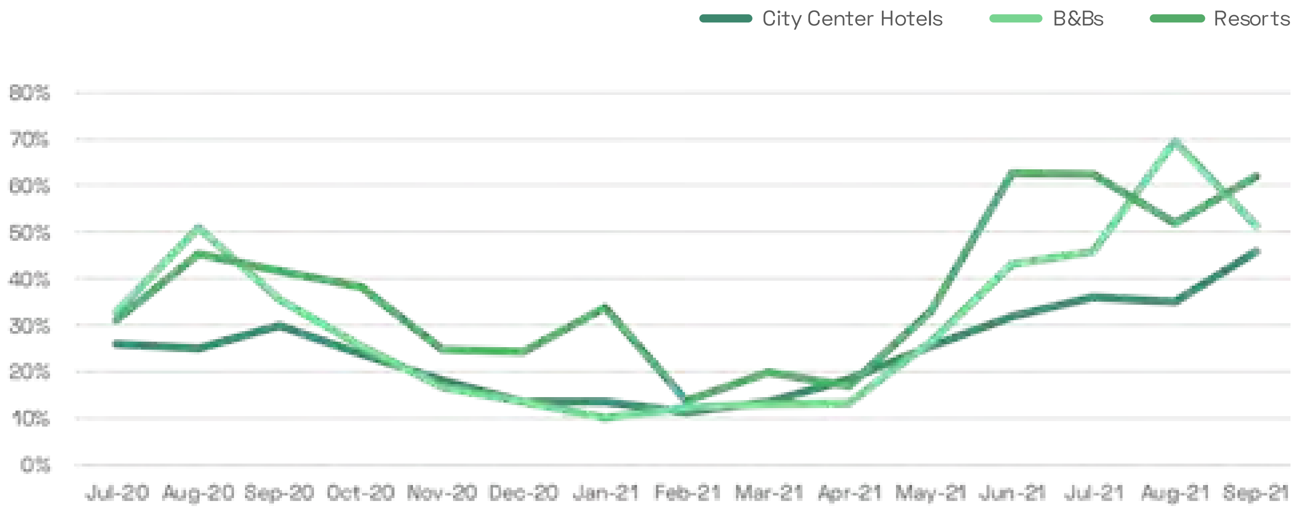
Occupancy Expectations

What is your expectation for total occupancy in September 2021?

52.0% Average Occupancy



September 2021 marks one of the highest occupancy expectations since the launch of the Hotelier PULSE report in April 2020 started - surpassed only by August 2021 at **58.0%.**



Property Segment breakdown:

- City hotels: 45.9%

- Resorts: 51.3%

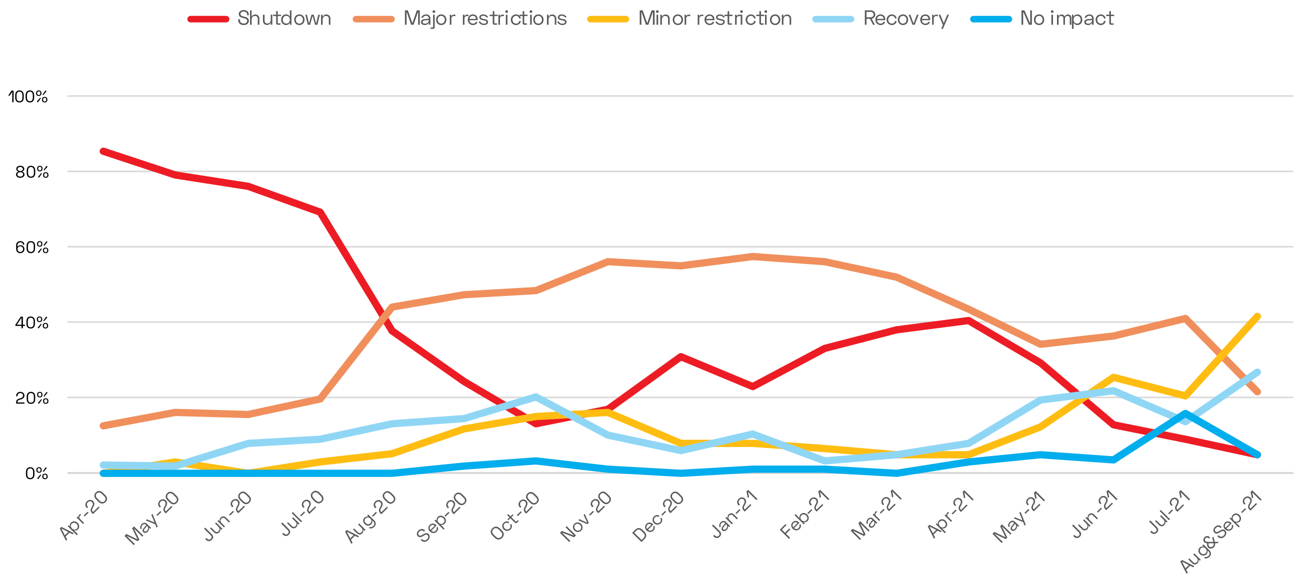
- Bed & Breakfasts: 61.9%

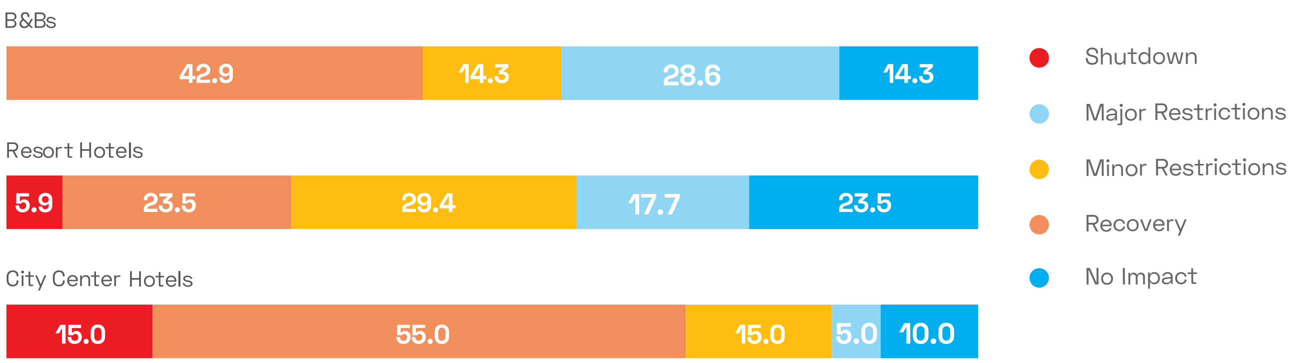
Of the market segments surveyed, City Center & Resorts expect higher occupancy levels in September than in August 2021.

How are Hotels Doing This Month?

For the first time since April 2020, the majority of properties surveyed in August 2021 are currently dealing with minor restrictions. In fact, most of the properties surveyed are moving away from the 'shutdown' and 'major restrictions' and into the 'minor restrictions' or 'recovery' stages.

What statement best describes the current status of your hotel today?





Property segment Segment breakdown:

City Hotels:

- Shutdown: **10.0%** (vs 15.0% in June 2021)
- Major restrictions: **25.0%** (vs 55.0% in June 2021)
- Minor restrictions: **35.0%** (vs 15.0% in June 2021)
- Recovery: **30.0%** (vs 5.0% in June 2021)
- No impact: **10.0%** (vs 10.0% in June 2021)

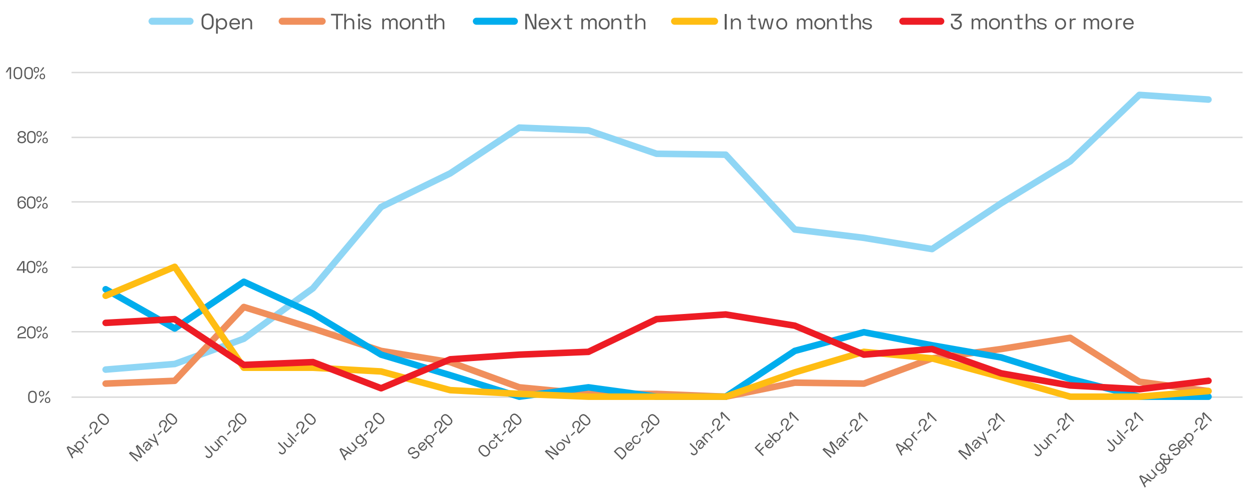
Resorts:

- Shutdown: **0.0%** (vs 5.9% in June 2021)
- Major restrictions: **16.0%** (vs 23.5% in June 2021)
- Minor restrictions: **52.0%** (vs 29.4% in June 2021)
- Recovery: **20.0%** (vs 17.7% in June 2021)
- No impact: **12.0%** (vs 23.5% in June 2021)

Bed & Breakfasts:

- Shutdown: **6.7%** (vs 0.0% in June 2021)
- Major restrictions: **26.7%** (vs 42.9% in June 2021)
- Minor restrictions: **33.3%** (vs 14.3% in June 2021)
- Recovery: **33.3%** (vs 28.6% in June 2021)
- No impact: **0.0%** (vs 14.3% in June 2021)

When will your hotel reopen?



Over **91.0%** of properties surveyed in August 2021 are now open and operational. Only **3.3%** will open over the course of the next 3 months, and just **5.0%** will wait until 2022 to reopen.

2.2

FINANCIAL RECOVERY FORECAST

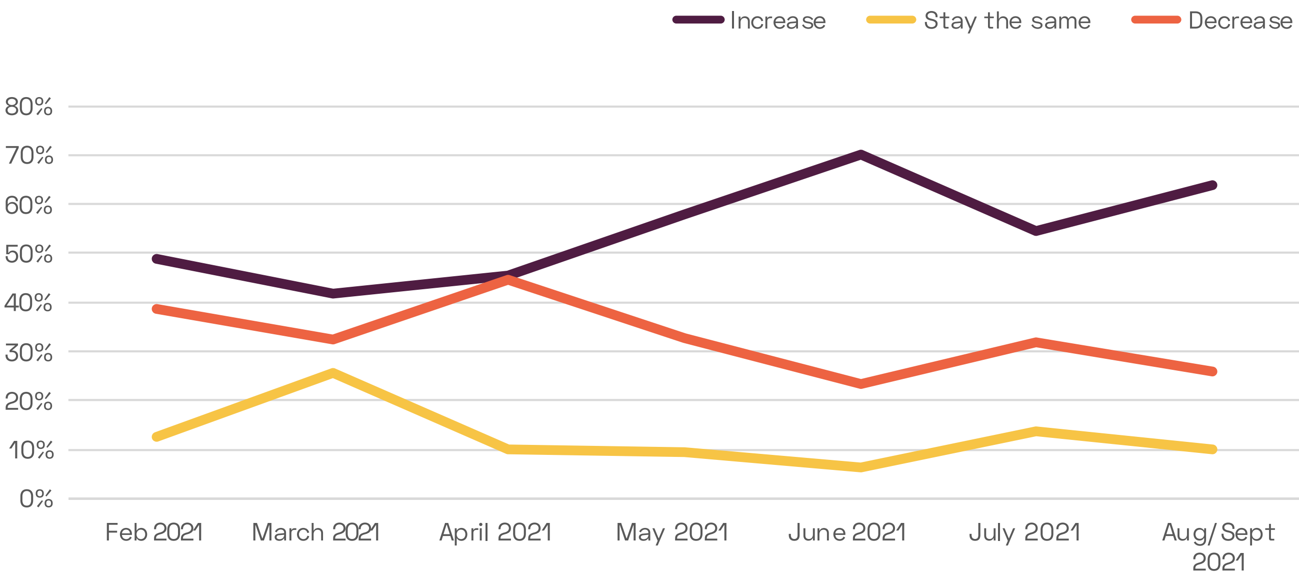
Key Takeaways

01 The majority (64.0%) of hotels surveyed in August 2021 now expect to increase revenue in 2021 vs 2020.

02 The majority of Hoteliers surveyed now expect to financially recover to 2019 levels in 2022 and 2021.

03 The majority of City Center Hotels and Resorts now expect to increase revenue in 2021 vs 2020, yet the majority of Bed & Breakfasts now expect revenue to decline.

What is your expectation of total hotel revenue in 2021 when compared to 2020?



01 **26.0% of Hoteliers now expect the revenue to decrease** in 2021 vs 2020 (compared to **31.8%** in June 2021).

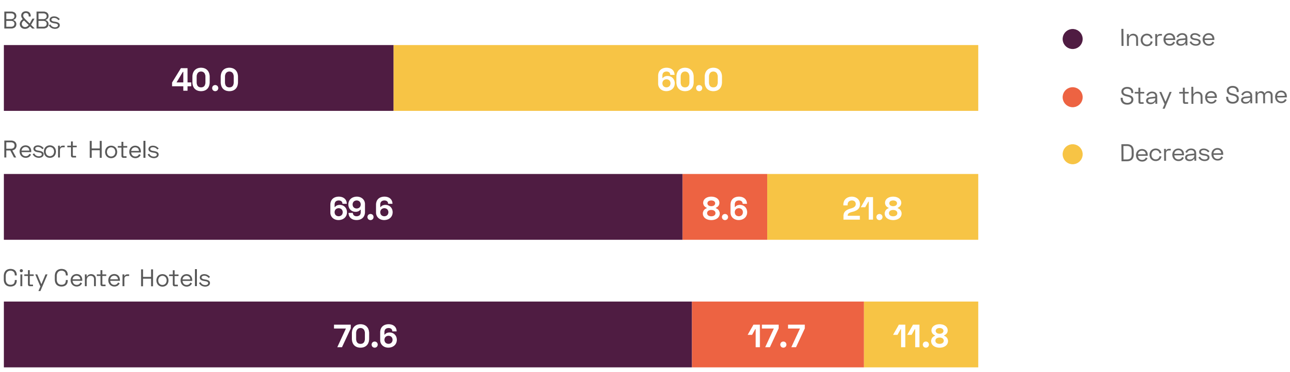
02 **10.0% of Hoteliers now expect to maintain the same revenue** level in 2021 vs 2020 (compared to **13.6%** in June 2021).

03 **64.0% of Hoteliers now expect to increase** revenue in 2021 vs 2020 (compared to **54.5%** in June 2021).

Our August survey results show a positive shift in the industry's expectation for revenue performance in 2021 vs 2020.

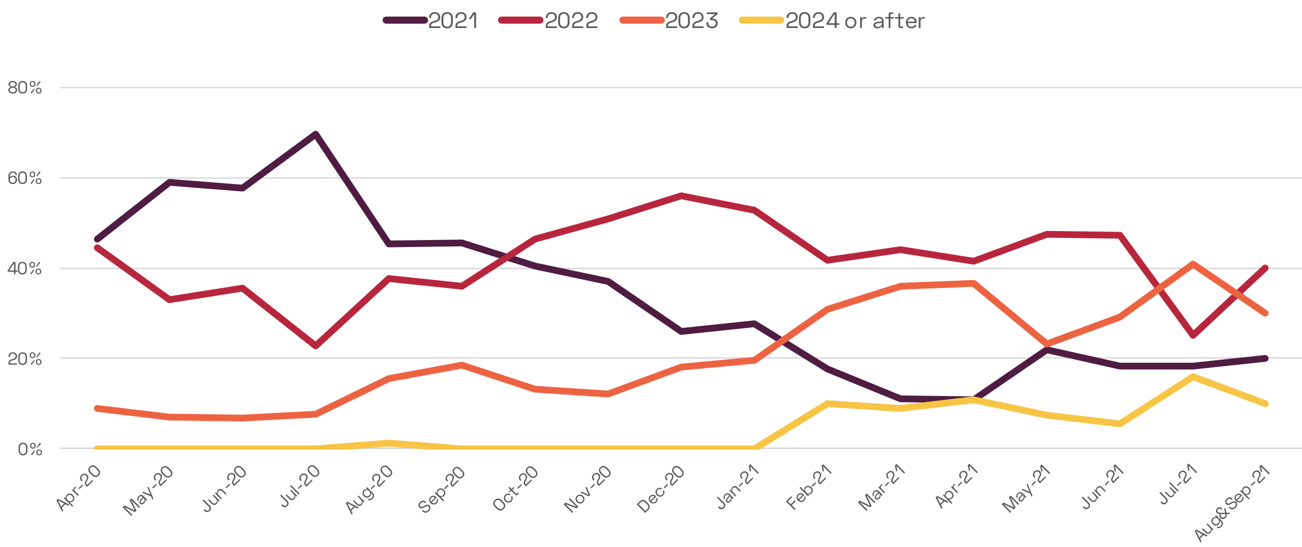
64.0% of hotels surveyed expect to increase revenue in 2021 vs 2020. Of those who shared this sentiment, **26.0%** expect revenue to increase by **50.0%** or more compared to 2020. However, there are still **36.0%** of respondents who believe their revenue will be the same or lower than 2020. Of those, **14.0%** expect revenue to decrease by **50.0%** or more in 2021 vs 2020.

What is your expectation of total hotel revenue in 2021 when compared to 2020?



Nearly **71.0%** of City Center Hotels and **70.0%** of Resorts are expecting to increase their revenue in 2021 vs 2020. However, **60.0%** of Bed & Breakfasts now expect less revenue than in 2020.

When do you estimate your business will recover to the same financial position 2019?

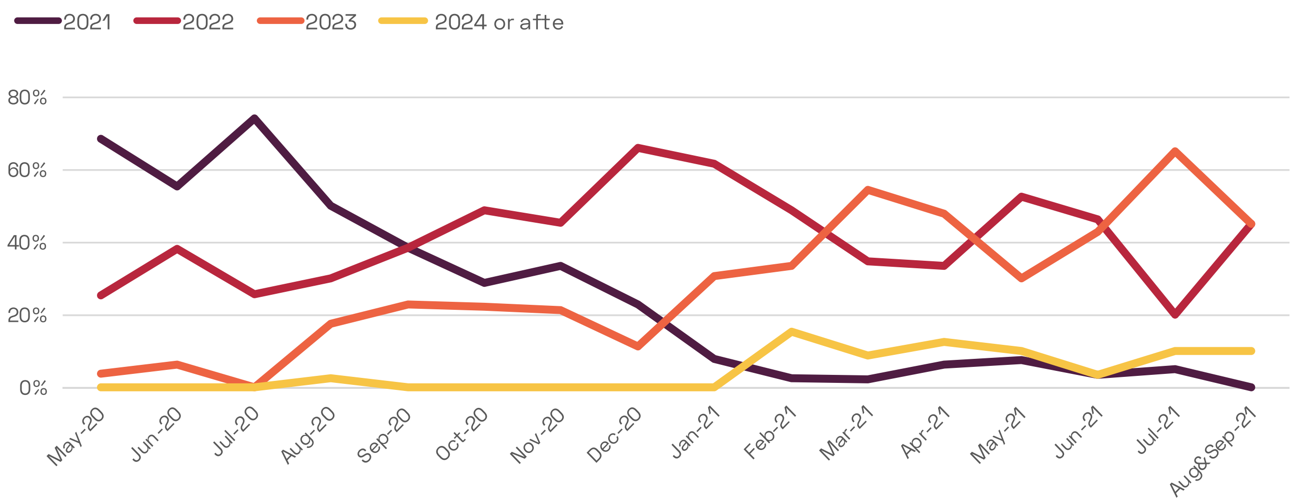


The majority of Hoteliers surveyed in August now expect to financially recover to 2019 levels in 2022 and, some, even in 2021. Currently, **40.0%** of hoteliers expect to financially recover to pre-pandemic levels in 2022 and **20.0%** expect to achieve the benchmark in 2021. Of Hoteliers delaying financial recovery expectations, **30.0%** expect to reach 2019 levels in 2023 and **10.0%** in 2024 or later.

Financial Recovery Forecast per Property Type

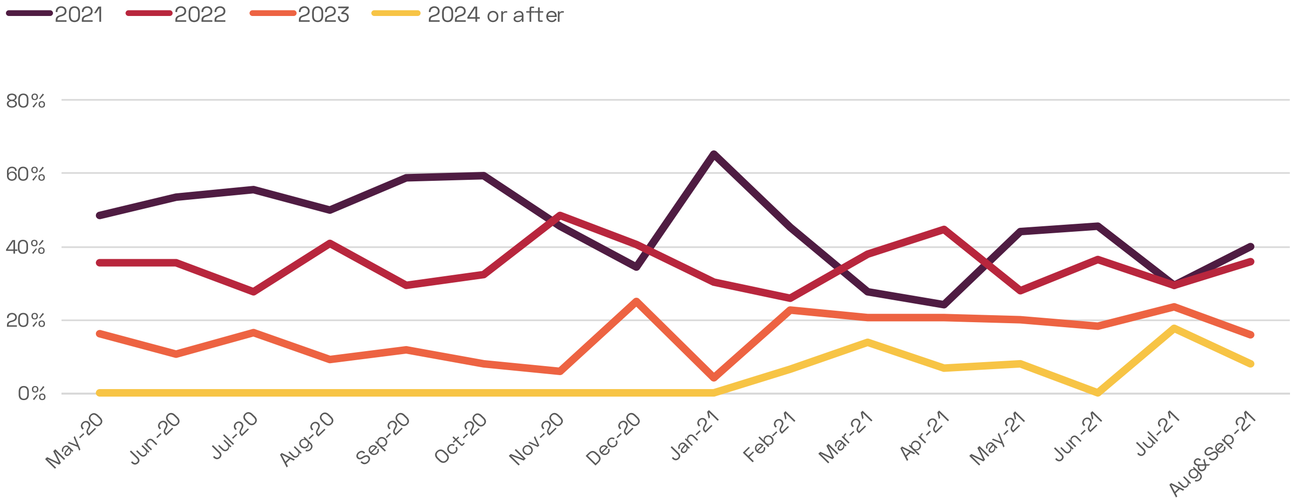
City Center Hotels show an equal split in the expected timeline for financial recovery, between next year or in two year's time. Of those surveyed, **45.0%** expect to reach 2019 financial levels in 2022 and 2023.

City Center Hotels



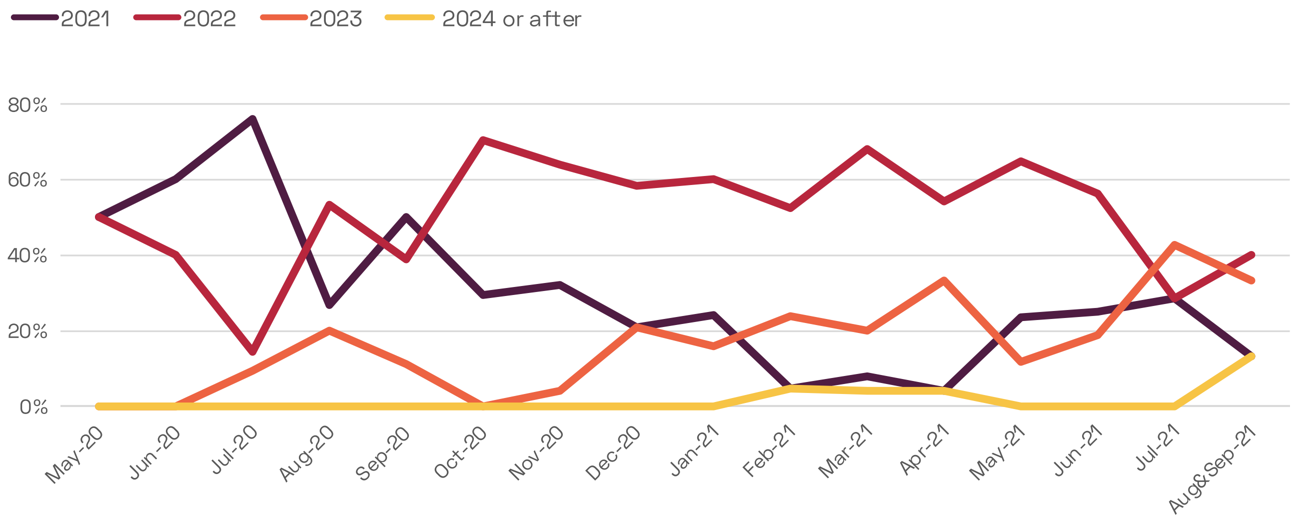
Resorts are the most optimistic market segment in the expected timeline for financial recovery to 2019 levels. Of those surveyed, **40.0%** expect to reach this target in 2021.

Resorts



The majority of Bed & Breakfasts (**40.0%**) expect to reach 2019 financial levels in 2022.

Bed & Breakfasts



2.3

SALES & MARKETING CONCERNS, PRIORITIES & STRATEGIES IN THE NEXT 12 MONTHS

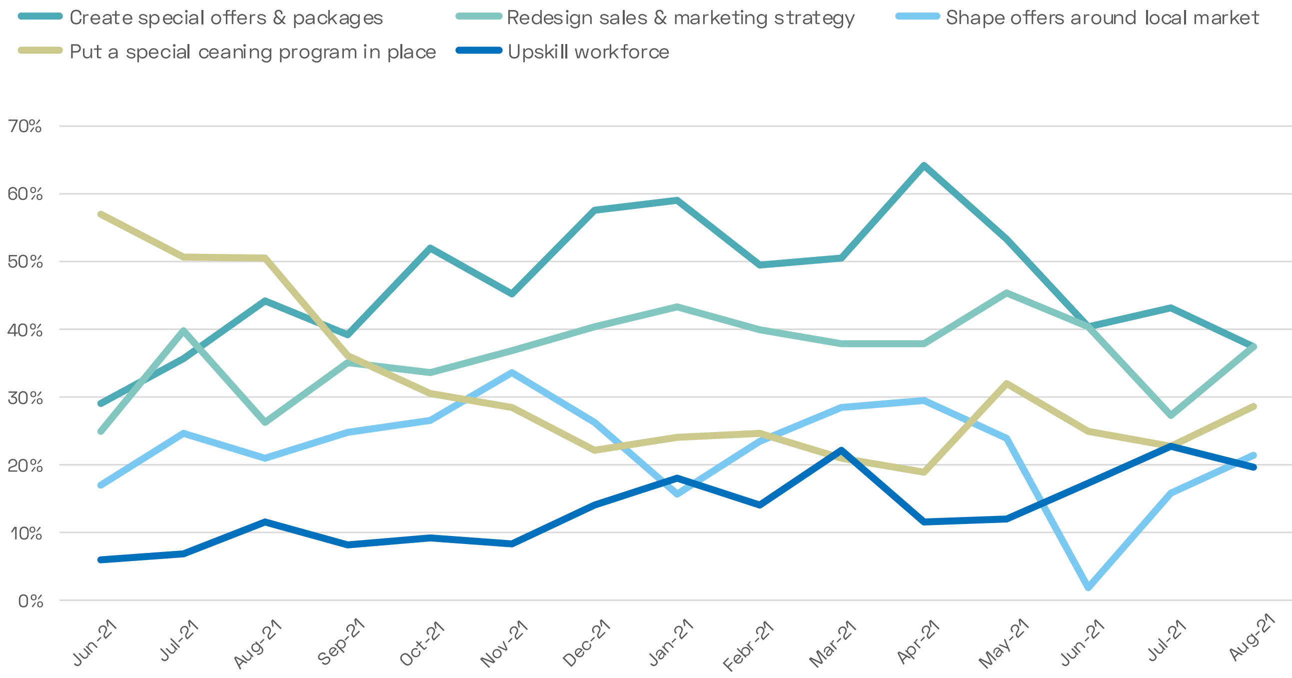
Key Takeaways

01 The majority of Hoteliers surveyed in August 2021 continue to establish their direct channels as the top source of reservations in the future.

02 Despite increasing international bookings (*see Market Trends chapter above), most Hoteliers still expect domestic and leisure travel to be the biggest contributors to recovery.

03 Curiously, the majority of Bed & Breakfasts surveyed expect International Leisure and Domestic Business travel to significantly contribute to recovery.

Select your number 1 priority in overcoming the Covid crisis and preparing for the upturn



Short Term Priorities to Recover from Crisis:

Top priorities according to Hoteliers surveyed in August 2021:

1. Create special offers & packages + Redesign sales & marketing strategies
2. Put a special cleaning program in place
3. Shape offers around local market
4. Upskill the workforce

Renegotiating distribution partnerships and offering long term vouchers for bookings are also top of mind for **14.3%** and **7.1%** of Hoteliers surveyed, respectively.

Short Term Priorities to Recover from Crisis:

We asked Hoteliers to rank by order of importance their Sales & Marketing Priorities to maximize sales and profitability over the next 12 months. By order of importance according to survey results, these are:

1. Hotel website: Ranks 1st Position

2. Social media: Ranks 2nd Position

3. Hotel CRS: Ranks 3rd Position

4. Rich media: Ranks 4th Position

5. Meta-search: Ranks 5th Position

6. OTAs: Ranks 6th Position

7. Channel Manager: Ranks 7th Position

8. Online Ads: Ranks 8th Position

9. New distribution technology: Ranks 9th Position

10. Price comparison widget with OTAs on website: Ranks 10th Position

11. Rate shopping system: Ranks 11th Position

12. Revenue management: Ranks 12th Position

13. Corporate Sales: Ranks 13th Position,

14. Tour Operators: Ranks 14th Position

15. Hotel bed banks: Ranks 15th Position

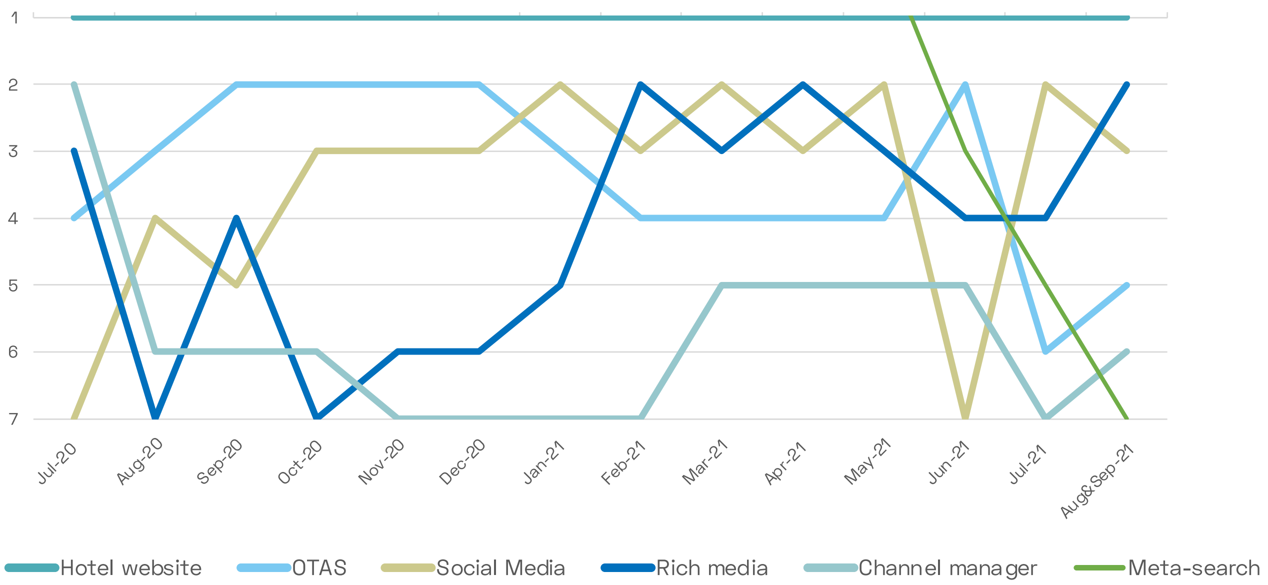
16. GDS: Ranks 16th Position

17. Joining a brand/soft brand: Ranks 17th Position

18. Sales Calls & roadshows: Ranks 18th Position

19. Trade Shows: Ranks 19th Position

Rank by order of importance your Marketing Priorities to maximize sales over the next 12 months



94.0% of Hoteliers surveyed view the **Hotel website** as very or extremely important while **74.0%** rank **Rich Media** as very important. Meanwhile, **74.0%** also rank **OTAs** as very or extremely important, yet **12.0%** do not expect these services to significantly impact their long-term Sales & Marketing Strategies. Although **72.0%** of Hoteliers surveyed rank **Channel Manager** as very or extremely important, **16.0%** rank it as slightly or not important at all. Furthermore, **68.0%** of Hoteliers rank **Social Media** as very or extremely important. While **64.0%** rank **Meta-search** as very or extremely important, **14.0%** do not expect it to significantly impact their their long-term Sales & Marketing Strategy.

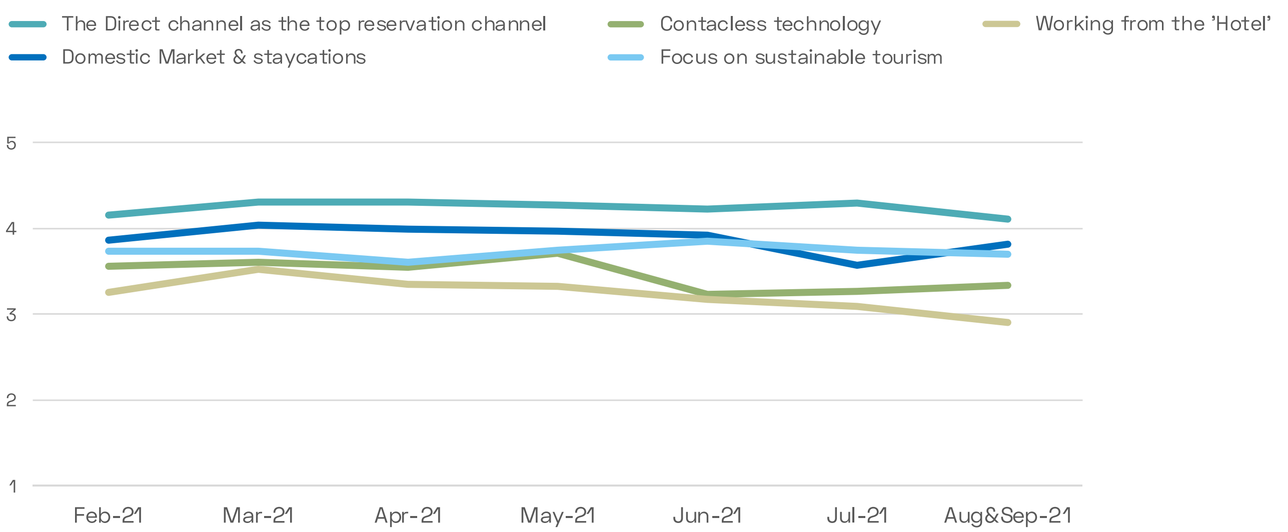
Hotel Trends that have Emerged or Re-Emerged as a Result of the Pandemic

We've seen a number of hotel trends emerge or re-emerge as a result of the pandemic. Since February 2021, we continue to ask Hoteliers to rank, by order of importance, which trends they plan to continue implementing in the next 12 months.

The trends by order of importance are:

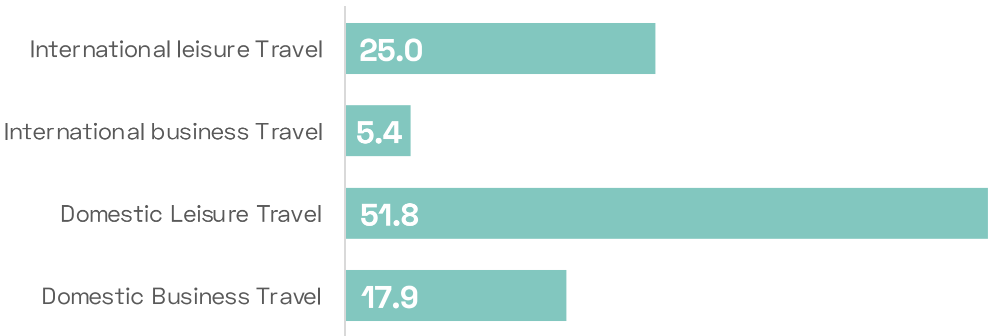
1. The Direct channel as the top reservation channel: 4.1 out of 7 (vs 4.2 in June 2021)
2. Domestic Market & Staycations: 3.8 out of 7 (vs 3.6 in June 2021)
3. Focus on Sustainable Tourism: 3.7 out of 7 (vs 3rd place at 3.8 in June 2021)
4. Contactless technology: 3.3 out of 7 (vs 3.3 in June 2021)
5. Working from the hotel: 2.9 out of 7 (vs 3.1 in June 2021)

Rank by order of importance (1 Not Important to 5 Extremely Important) the top trends you plan to continue implementing in the next 12 months.

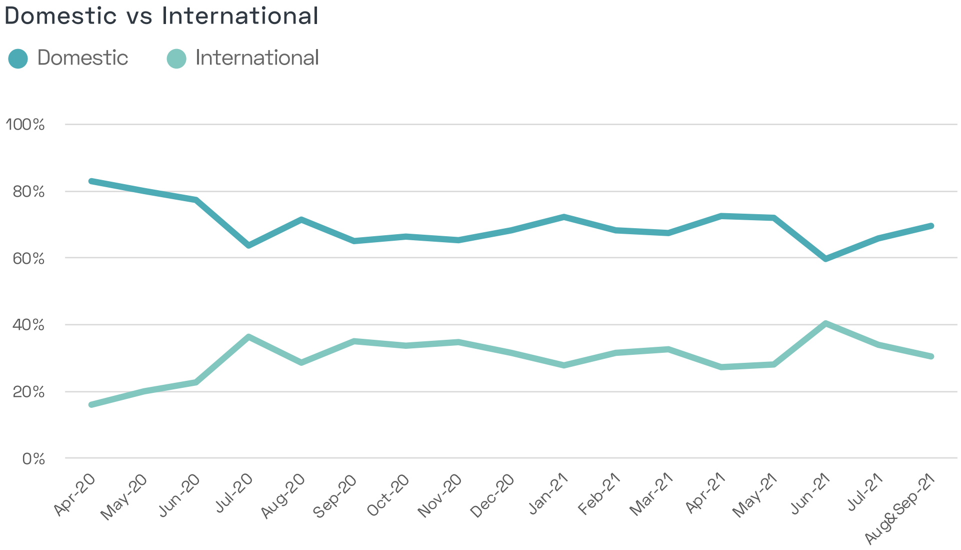


Which Segment will be the first to Contribute to Your Recovery once Restrictions are Lifted?

- **International Leisure: 25.0%** (vs 27.3% in June 2021)
- **International Business: 5.4%** (vs 6.8% in June 2021)
- **Domestic Leisure: 51.8%** (vs 45.5% in June 2021)
- **Domestic Business: 17.9%** (vs 20.5% in June 2021)

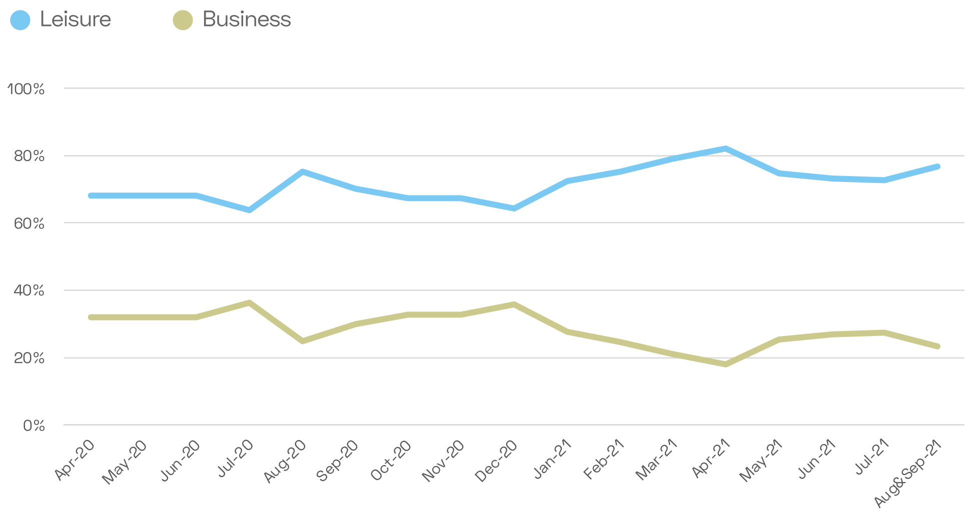


The expectation for domestic and leisure travel's contribution to recovery continues to grow, while the expectation for International travel and business travel in general is decreasing. **69.7%** of Hoteliers surveyed expect Domestic Travel to significantly contribute to hotel recovery. Just **30.4%** expect international travel to significantly contribute to recovery.

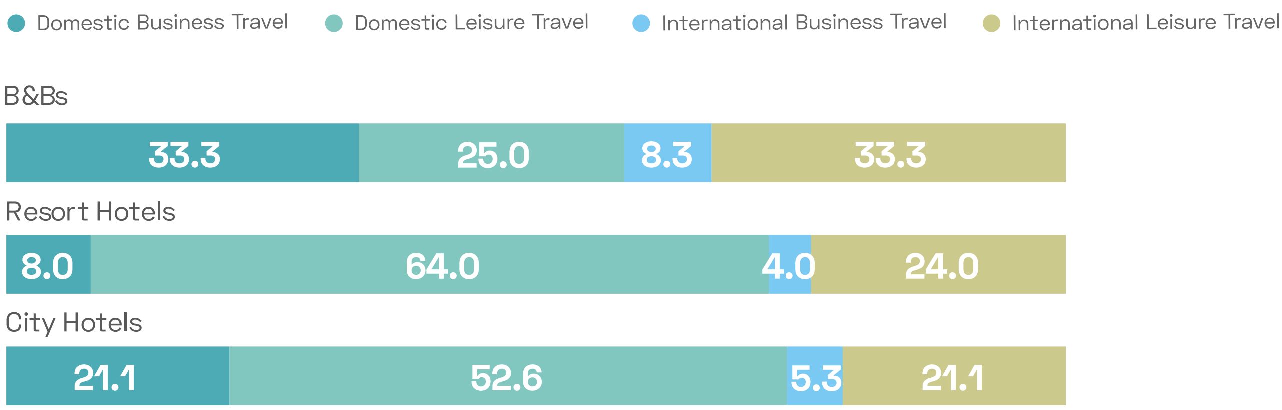


76.8% of Hoteliers surveyed expect Leisure Travel to significantly contribute to recovery. A decreasing number of Hoteliers (**23.2%** vs **27.3%** in June 2021) expect the same of Business travel.

Leisure vs Business



Hotel Segment breakdown:



- City Center Hotels:

Majority (**53.6%**) expect **Domestic Leisure** to be the strongest contributor to recovery.

- Resorts:

Majority (**64.0%**) also expect **Domestic Leisure** to be strongest contributor to their recovery

- Bed & Breakfasts:

Majority (**33.3%**) expect **Domestic Business and International Leisure** to be the strongest contributors to their recovery

Travel/Hotel Segment breakdown:

- International Leisure Travel:
Showing the most optimism, **33.3%** of Bed & Breakfasts expect this travel segment to significantly contribute to recovery. City Center Hotels are the least optimistic segment, at **21.1%**.

- Domestic Leisure Travel:
52.9% Resorts expect this travel segment to significantly bolster recovery, while Bed & Breakfasts are the least optimistic at **25.0%**.

- International Business Travel:
Bed & Breakfasts show the most optimism, with **8.3%** expecting this travel segment to be the main contributor to recovery. Resorts are the least optimistic, at just **4.0%**.

- Domestic Business Travel:
Bed & Breakfasts are the most optimistic segment at **33.3%**, while the least optimistic segment is Resorts at **8.0%**.

2.4

GUEST BEHAVIOUR & HOTEL EXPECTATIONS

Key Takeaways

01 The majority of Hoteliers surveyed appear to cautiously expect that revenge travel may still occur in 2021.

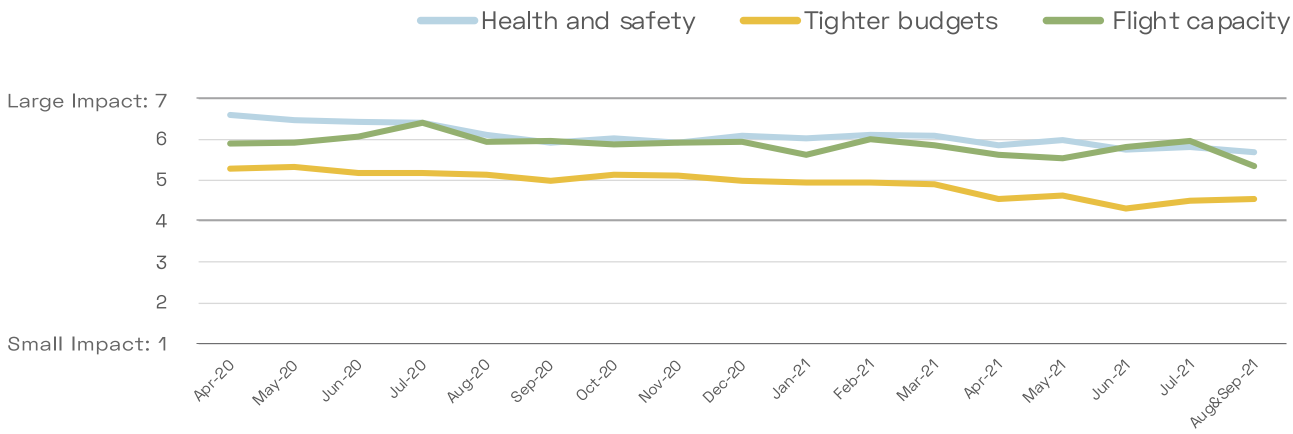
02 ADR, Marketing spend, and Hotel Direct Bookings are all forecasted to increase over the next 12 months.

03 The level of vaccination per destination is considered to be of the highest significance to the uptick of meetings and events.

Consumer Behaviour Concerns:

We continue to track the evolution of industry expectations around consumer behaviour and the impact on business. The following consumer behaviour concerns were rated on a scale of 1 to 7 by Hoteliers - with 1 considered 'Not Important' and 7 considered 'Extremely Important'.

On a scale from 1 to 7, rate the following concerns and the impact they have on your business:



Our August 2021 survey results show that all consumer behaviour concerns are decreasing in importance. Overall Rankings in importance from 1 to 7 are as follows:

1. Health & Safety: Ranks **1st position at 5.7** vs 2nd position in June 2021
2. Flight Capacity: Ranks **2nd position at 5.4** vs 1st position in June 2021
3. Tighter Budgets: Ranks **3rd position at 4.5** vs 3rd position in June 2021

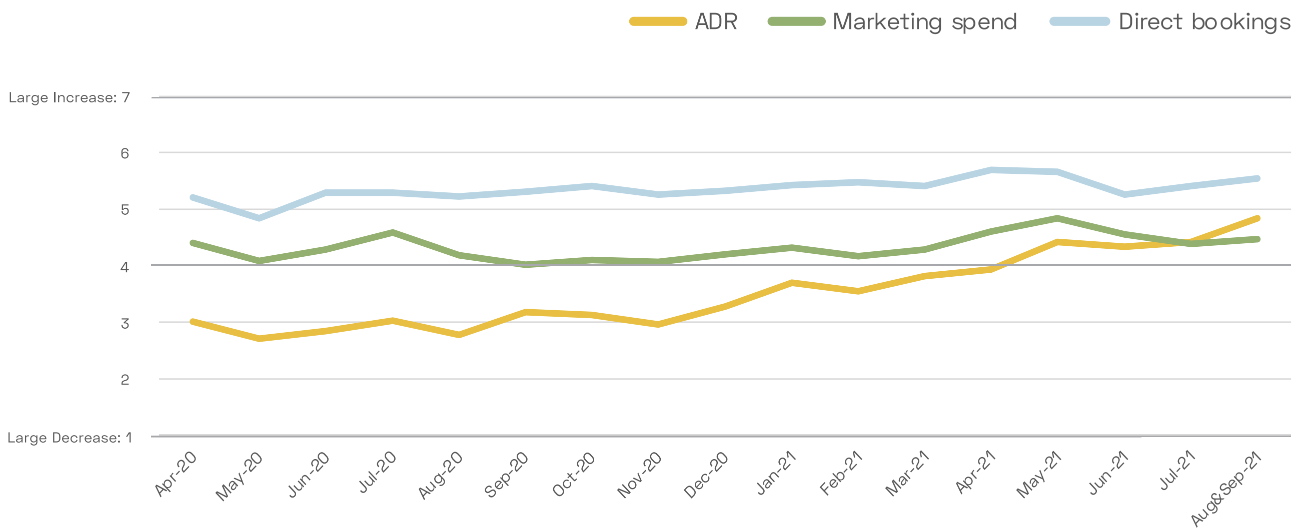
Hotel Segment breakdown:

- City Hotels: Most concerned about flight capacity, and least concerned about tighter consumer budgets

- Resorts: Most concerned about health & safety precautions, and least concerned about about tighter consumer budgets

- Bed & Breakfasts: Most concerned about health & safety precautions, and least concerned about tighter consumer budgets

In a scale from 1 to 7 rate your expectation on whether ADR, marketing spend and the importance of direct bookings will increase or decrease:



We continue to ask Hoteliers to rate, on a scale of 1 to 7 (with 7 being the highest level), their expectations on whether ADR, Marketing Spend, and the Importance of Direct Bookings will increase or decrease in the next 12 months. In this edition, Hoteliers are more likely to increase their ADR, to spend more on marketing and also to focus on the direct bookings.

Overall Rankings:

- **ADR:** 4.8 out of 7 (vs 4.4 in June 2021)
- **Marketing Spend:** 4.5 out of 7 (vs 4.4 in June 2021)
- **Direct Bookings:** 5.5 out of 7 (vs 5.3 in June 2021)

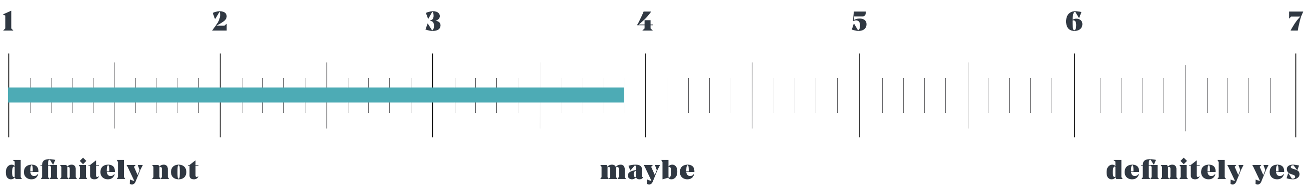
Revenge Travel

We asked hoteliers to rank from a scale of 1 to 7 how likely they believe it is that Revenge Travel will Happen in 2021. The overall industry ranking in August 2021 is **3.9**, indicating the majority of Hoteliers surveyed cautiously expect that revenge travel may still occur this year. Resorts show the greatest expectation that revenge travel will still occur in 2021, followed by City Center Hotels and Bed & Breakfasts.

Property Segment Breakdown:

- **Resorts: 4.4**
- **City Hotels: 4.2**
- **Bed & Breakfasts: 2.6**

Do you expect "Revenge Travel" to happen in 2021?

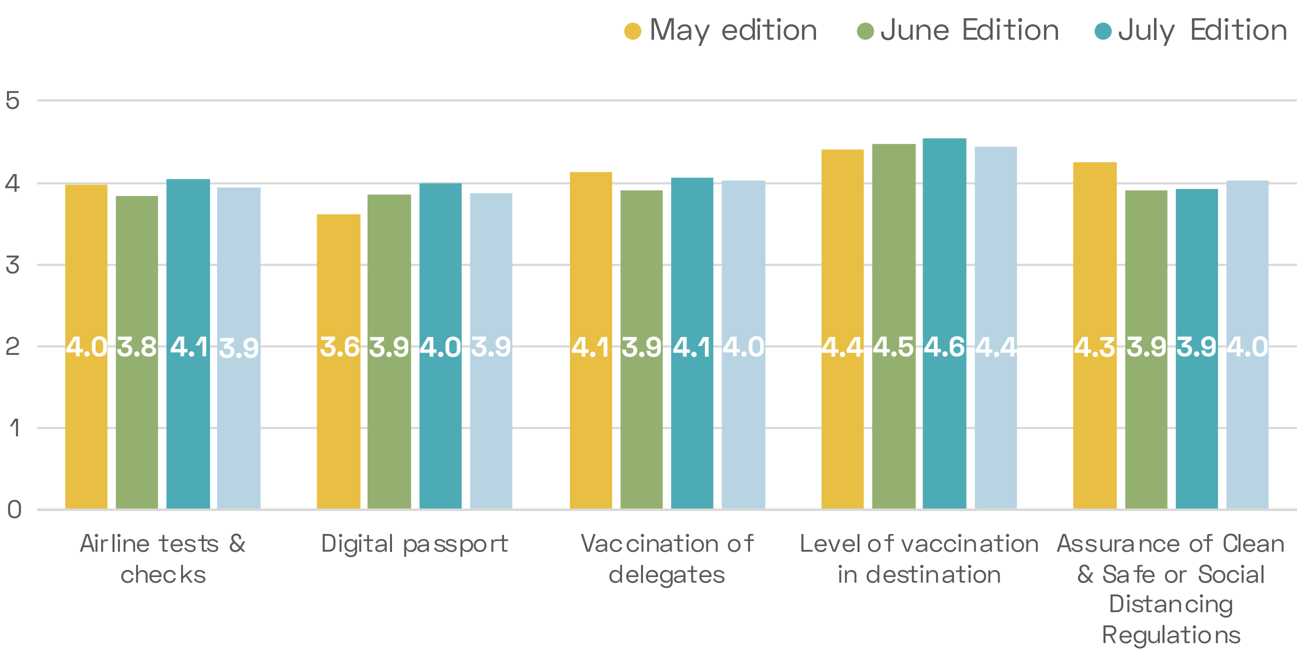


Hoteliers' Expectations on Meetings and Events (MICE)

We asked Hoteliers in August 2021 to to rank, by order of importance, which of the following measures will significantly impact the uptick of Hotel Meetings & Events over the next 12 months. Currently, Hoteliers have ranked the listed measures as follows:

- **Level of vaccination in destination: 4.4 out of 7**
- **Assurance of Clean & Safe or Social Distancing Regulations: 4.0 out of 7**
- **Vaccination of delegates: 4.0 out of 7**
- **Airline tests & checks: 3,.9 out of 7**
- **Digital passport: 3.0 out of 7**

Rank by order of importance which of the following issues will be more impactful on the uptick of Events for Hotels over the next 12 months:



Hotel Segment Breakdown:

- **City Hotels:** Most concerned about level of vaccination in destinationandLeast concerned about assurance of clean & safe or social distancing regulations

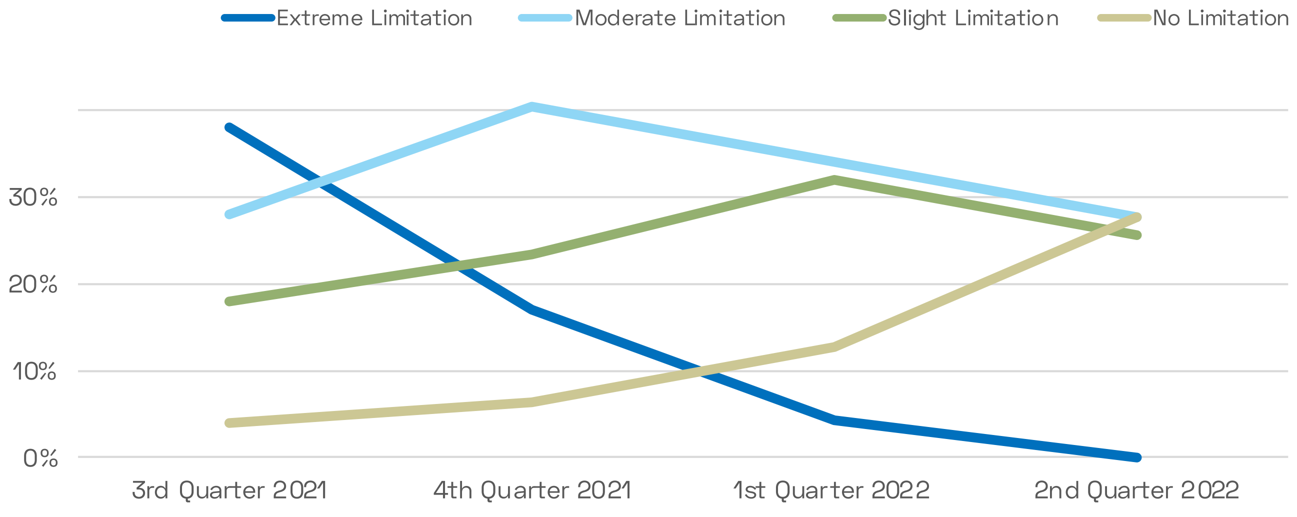
- **Resorts:** Most concerned about level of vaccination in destination and Least concerned about Digital Passport

- **Bed & Breakfasts:** Most concerned about level of vaccination in destination and Least concerned about Vaccination of delegates

Hoteliers' Expectations on Business Travel

We also asked Hoteliers in August 2021 to rank the degree to which Covid-19 will limit Business Travel Plans, from now until the end of 2022.

Please rank the degree of limitation to which you think Covid-19 will limit your Business Travel Plans for the following periods below.



Conclusions

As vaccinations accelerate and more destinations reopen or plan to reopen their economies, the latest market trends and industry sentiments signal the start of the new post-covid era for our industry.

Yet, it seems Hoteliers are determined to maintain some of the gains they made at the height of the crisis - namely to maintain control of distribution and optimize direct channel growth in a post-covid world.

What will the industry outlook be in September 2021? Take our latest Hotel Business Barometer to find out.

Go To Survey →

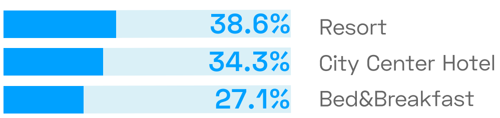
About This Report

For the 17th Edition of The Hotelier PULSE Report, we surveyed 70 key decision-makers at hotels. General Managers represent the majority of our respondents at **32.9%**, followed by Group CEOs/Property Managers at **25.7%**. The remaining respondents include Front Office Managers (**15.7%**), followed by Directors of Sales and Revenue Managers/e-Commerce Managers (each **10.0%**), Marketing Directors & Managers (**4.3%**), and IT Managers (**1.4%**).

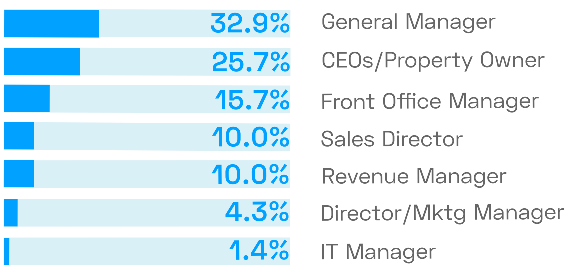
The majority of our respondents come from Europe (**77.1%**), followed by North America (**14.3%**), South America (**4.3%**), Asia (**2.9%**), and Africa (**1.4%**).

Most of our respondents are from Resorts at **38.6%**, followed by City Center Hotels (**34.3%**), and Bed & Breakfasts (**27.1%**).

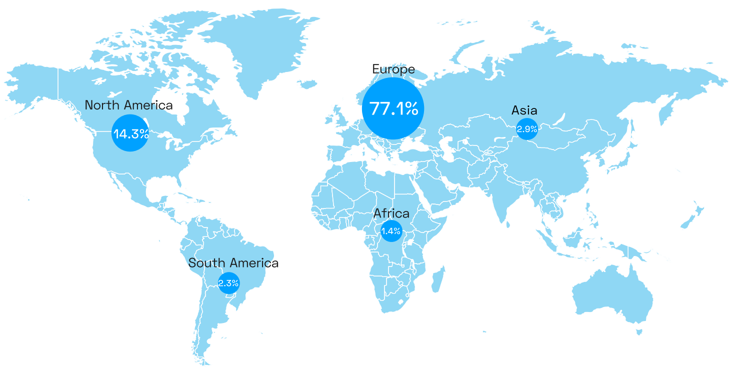
Type of Property



Role



Property Locations



MUST-READ THIS MONTH

Hotel Technology – 6 Ways to Upskill the Workforce

In this article, we outline what you need to think about before implementing a new technological solution and how you can successfully train your hotel staff on new technology and ultimately optimize the guest experience.

READ FULL ARTICLE →

Hotel Bookings – What is the Guest's Decision-Making Process?

What makes your hotel stand out to people booking their next holiday? Where do your prospective guests book and why? Read on to find the answers to these questions.

READ FULL ARTICLE →

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About Guestcentric

GuestCentric is a leading provider of cloud-based digital marketing software and services that help extraordinary hoteliers promote their brand, drive direct bookings and connect with customers on all digital platforms. GuestCentric's all-in-one platform provides hotels with the only unified solution for managing their guests' online journey, with award-winning, high impact websites and built-in booking engines working as one. GuestCentric is featured on Skift Travel Tech 250, a list of the top 250 travel tech companies shaping the modern-day travel experience.

About Great Hotels of the World

Represents a portfolio of 60 largely independent upscale hotels and resorts worldwide that have been thoughtfully curated to cater to the rising bleisure traveller. Beyond exceptional accommodation, a sweeping range of meetings and events venues, and world-class leisure facilities in exciting destinations, the Great Hotels of the World brand is a seal of authenticity and character in hospitality. For more information, please visit **join.ghotw.com**.

The Hotelier

Pulse Report

We will be emailing you and other hoteliers another round of questions next week or you can take our new survey directly here.

Go To Survey →

If you would like to track the evolution of sentiment across the industry, be sure to take our poll.

If you have any question, please reach out at
hotelierpulse@guestcentric.com

guestcentric

GREAT HOTELS OF THE WORLD