

# Pulse Report

Highlights Edition 20



## Monthly Business Optimism Barometer

### How optimistic are you?

Following a wave of new restrictions across Europe, Hoteliers surveyed in November show a slight dip in optimism about business performance over the next 12 months, ranking **7.0 out of 10**.

**7.0/10**

hotel business optimism



Resorts are the most optimistic segment (**7.9/10**)

followed by Bed & Breakfasts (**6.7 out of 10**), and City Center Hotels (**6.7 out of 10**).

## Question of the Month

### What are your top concerns for 2022?

- 1 New travel restrictions
- 2 Labour shortage
- 3 Last minute bookings
- 4 Reclaiming control of online distribution
- 5 Increasing ADR
- 6 Slow business travel recovery
- 7 Vaccination rates in your destination
- 8 Economic inflation



new travel restrictions is the top concern for 2022

## Monthly Occupancy Forecast

**41.2%**

exceeded occupancy forecast for November



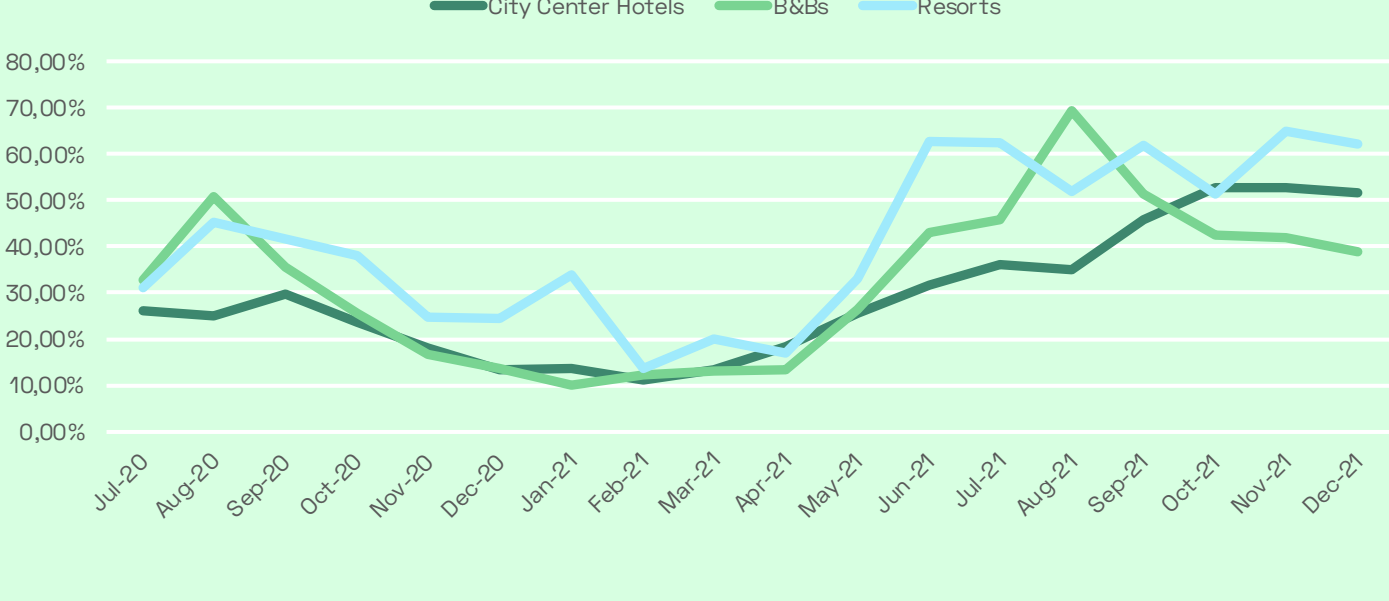
**41.2% of hoteliers exceeded the occupancy forecast for November 2021.**

vs 47.1% who said the same for October 2021.

Resorts are the most optimistic segment with **62.1%** occupancy expected in December.

followed by City Center Hotels (**51.7%**), and Bed & Breakfasts (**38.8%**).

### Occupancy Expectation



## Revenue Performance & Financial Recovery Forecast

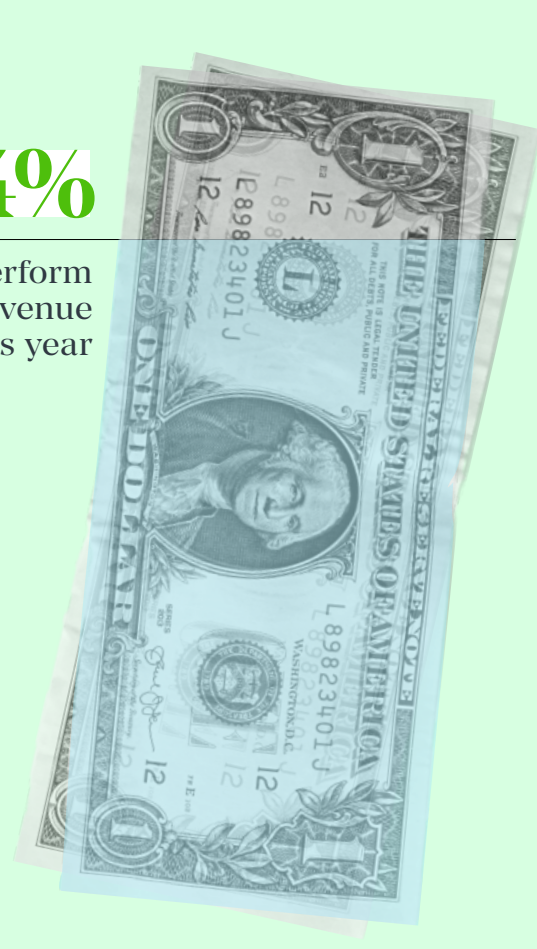
**82.4% expect to outperform 2020 revenue levels in 2021**

**82.4%**

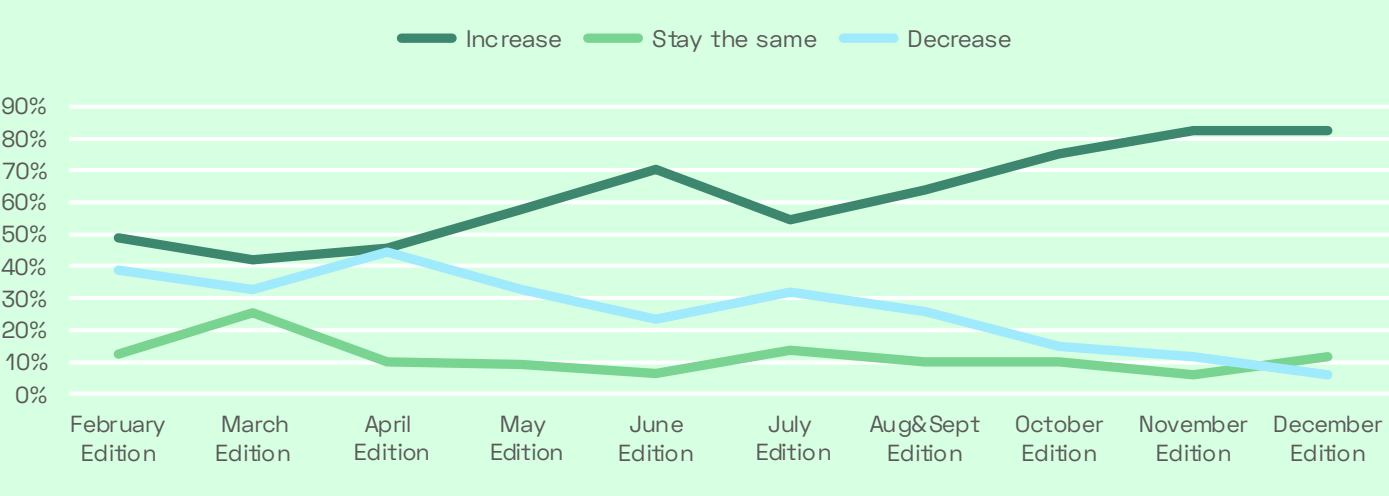
expect to outperform 2020 revenue levels this year

All Resorts surveyed expect to exceed 2020 revenue levels in 2021,

Followed by **88.9%** of Bed & Breakfasts, and **70.6%** of City Center Hotels.



### 2021 Revenue VS 2020



## Travel Segment Recovery & Performance Forecast



**international & leisure** are expected to boost travel recovery

**Hoteliers expect international (↑ 58.1%) & leisure (↑ 83.9%) travel to significantly contribute to their recovery.**

The majority across all market segments expect **international leisure travel** to be the strongest contributor to their recovery.

The majority of Hoteliers surveyed expect the four travel segments to **exceed** pre-pandemic levels in 2022.

## Sales & Marketing Expectations, Priorities & Strategies

**Most Hoteliers expect ↓ ADR, ↓ Marketing Spend, and ↓ Hotel Direct Bookings to increase over the next year.**

The majority of Hoteliers surveyed rank the **Hotel website** their most important tool to optimize sales and marketing strategies over the next 12 months. **OTAs** currently sit in 7th position.



**ADR, marketing spend & direct bookings** are expected to increase over the next year

### Hotel expectations



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