

Pulse Report

Highlights Edition 21

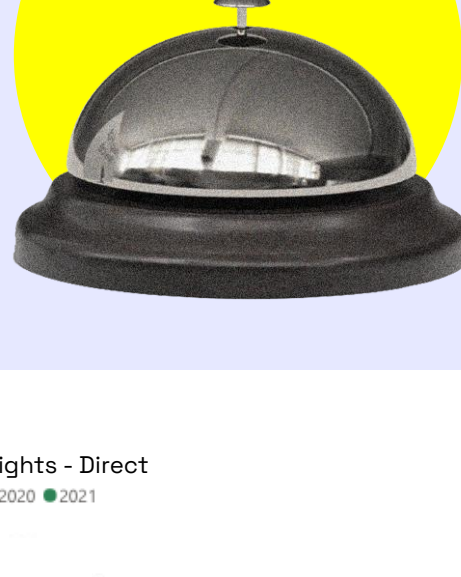


2021 Year in Review

Welcome to our 2021 Year in Review edition of the Hotelier PULSE Report. Here, we review the market trends and sentiment analysis from thousands of Hotels analysed and surveyed over the course of 2021.

Market Trends Review in 2021

More guests who booked direct converted into check-in nights when benchmarked against 2019 levels

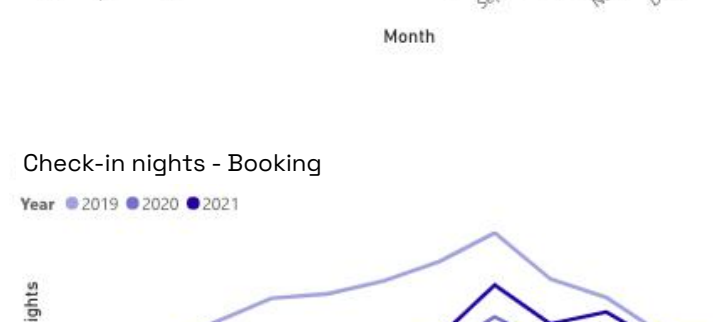


In July, hotel direct stays exceeded 2019 levels and have maintained this position up until December 2021

All other channels, including major OTAs Booking and Expedia, GDS, and all other channels (including wholesalers) remained below 2019 levels in 2021.

Check-in nights - Direct

Year ● 2019 ● 2020 ● 2021



Check-in nights - Expedia

Year ● 2019 ● 2020 ● 2021



Check-in nights - Booking

Year ● 2019 ● 2020 ● 2021



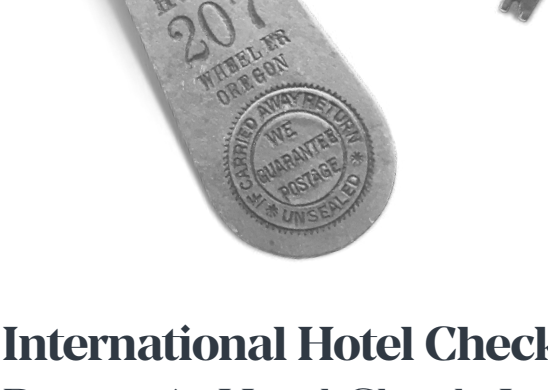
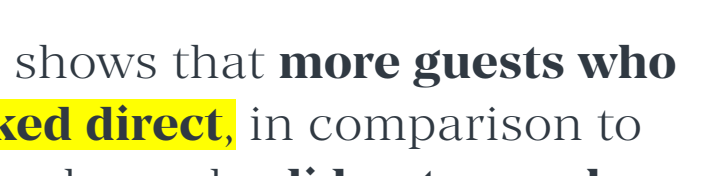
Check-in nights - GDS

Year ● 2019 ● 2020 ● 2021



Check-in nights - Others

Year ● 2019 ● 2020 ● 2021

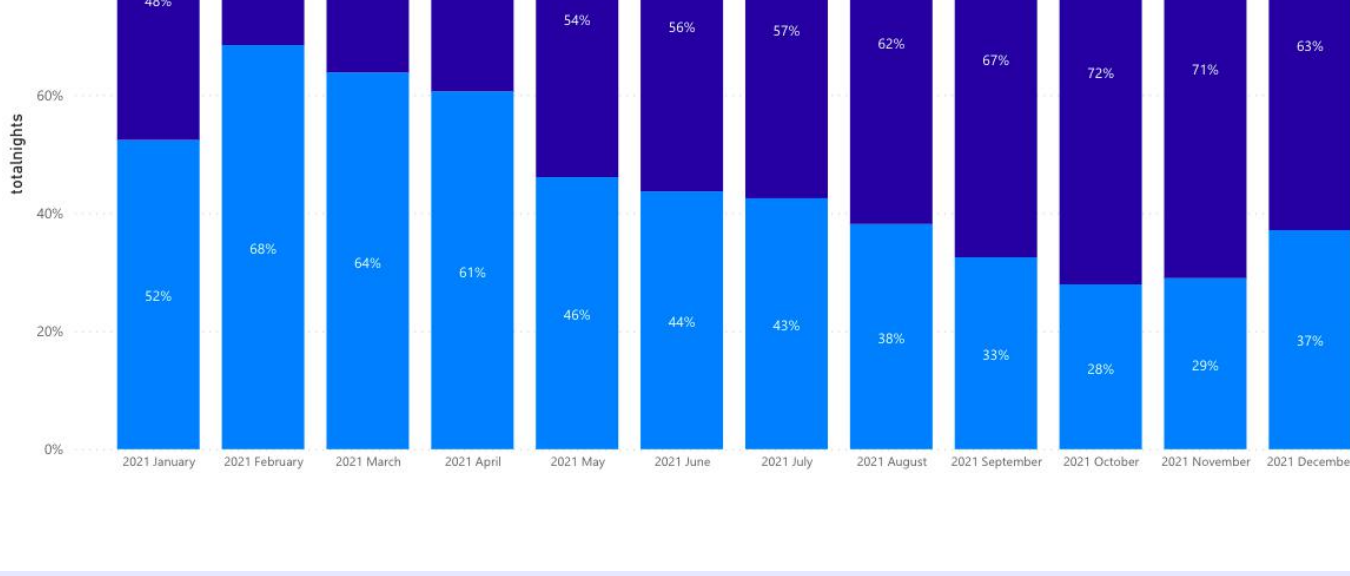


This shows that **more guests who booked direct**, in comparison to other channels, **did not cancel or defer their bookings in 2021**.

International Hotel Check-Ins overtook Domestic Hotel Check-Ins from May until December 2021:

Domestic Hotel Check-Ins from May until December 2021:

Domestic ● International



Monthly Business Optimism Barometer & Occupancy Forecast evolution in 2021

6.8/10 optimism about business performance



Hoteliers surveyed in December 2021 showed a dip in optimism about business performance over the next 12 months, ranking **6.80** out of 10.

Resorts show the most optimistic outlook for business performance in 2022, ranking 7.50 out of 10. Bed & Breakfasts and City Center Hotels each ranked 6.63 out of 10.

Question of the Month

We asked Hoteliers in December 2021:

How confident do you feel that your hotel can manage **changing restrictions** in the foreseeable future?

On average, Hoteliers surveyed in December 2021 ranked 6.3 out of 10 in confidence levels.



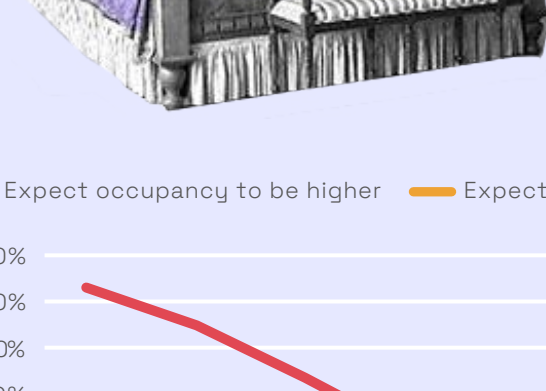
6.3/10 in confidence levels

What are your thoughts about **in-person meetings**?

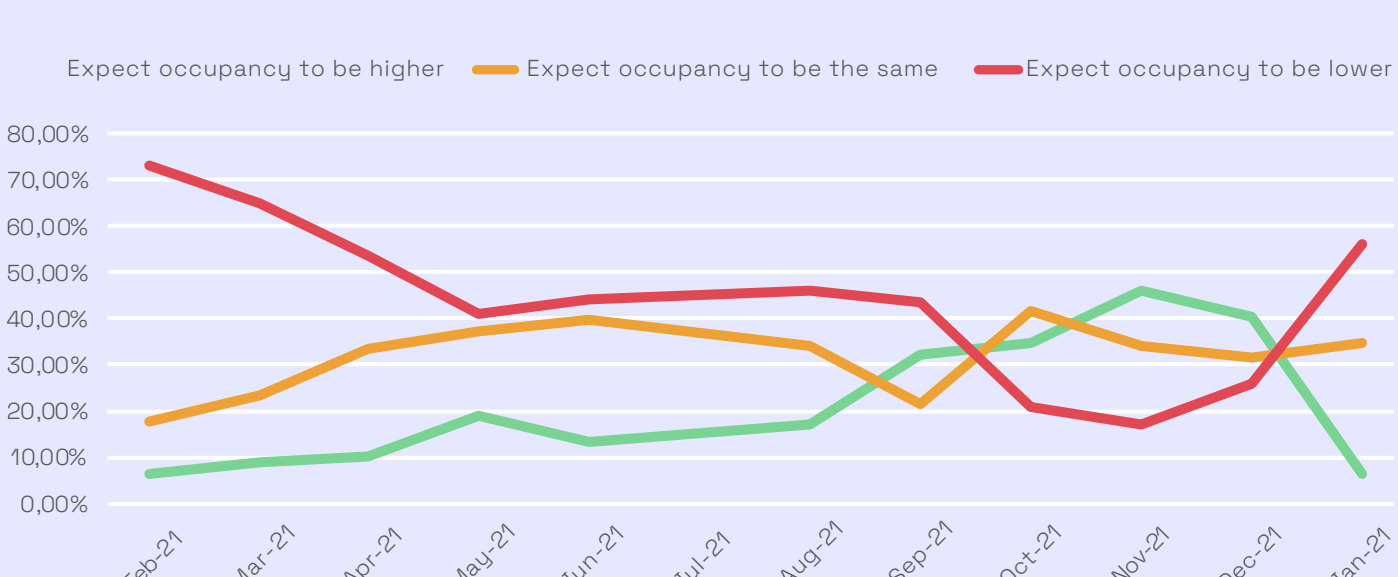
A thing of the future 73.33%
A thing of the past 26.67%

Monthly Occupancy Forecast

57.14%



A staggering **57.14%** did not achieve the occupancy forecast for December 2021

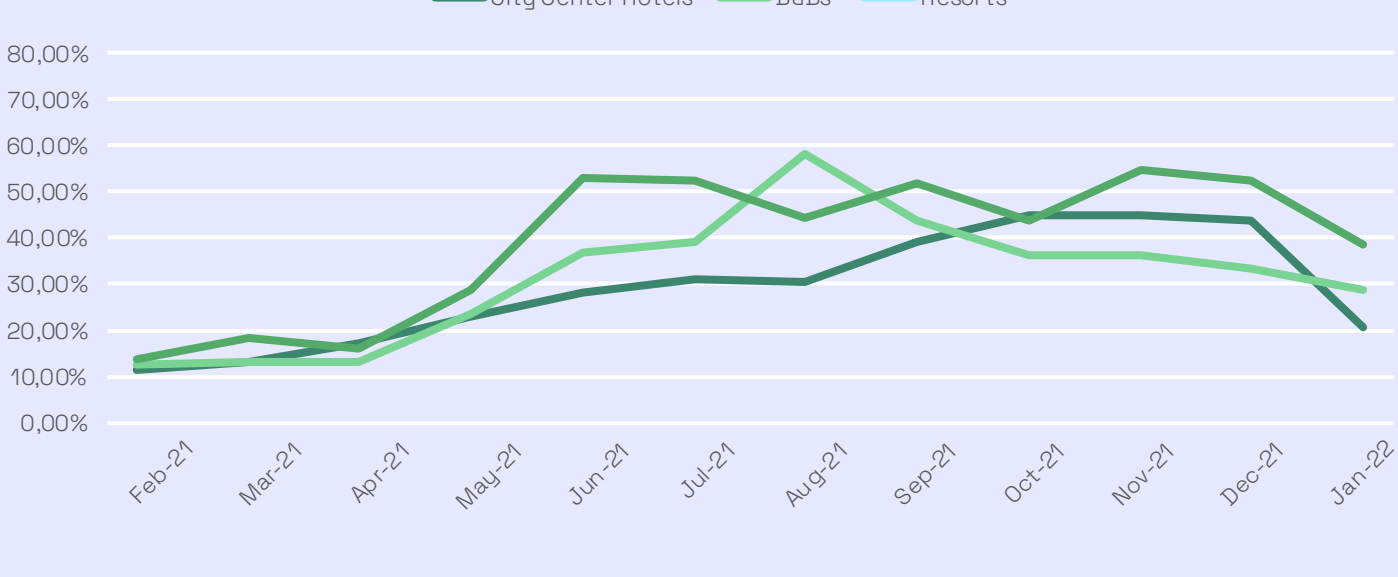


Resorts show the highest expectations, forecasting an average of 44.75% occupancy.

followed by Bed & Breakfasts (32.5%), and City Center Hotels (23%).

Occupancy Expectation

● City Center Hotels ● B&Bs ● Resorts



Revenue Performance & Financial Recovery Forecast

Revenue Performance: 2021 vs 2020

69.22% of Hoteliers surveyed said they **outperformed** 2020 revenue levels

23.09% decreased their revenue in 2021 vs 2020.



69.22% outperformed 2020 revenue levels

Travel Segment Recovery & Performance Forecast

57.14% of Hoteliers expect **international & leisure** (78.57%) travel to significantly contribute to hotel recovery in 2022



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Sales & Marketing Concerns, Priorities & Strategies

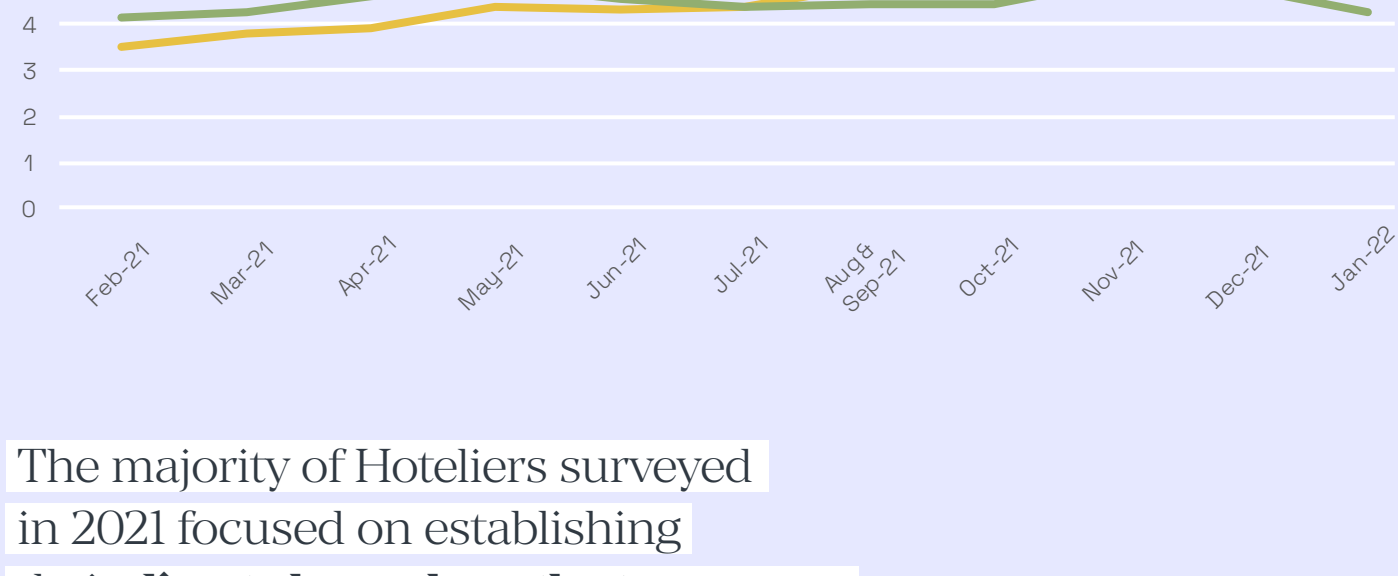
Over the course of 2021, the majority of Hoteliers surveyed **expected ADR, Marketing Spend, and Hotel Direct Bookings to increase** over the next 12 months.



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

Hotel Expectations

● ADR ● Marketing Spend ● Direct Bookings



The majority of Hoteliers surveyed in 2021 focused on establishing their **direct channels as the top source of reservations** over the next 12 months.

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