

# Pulse Report

Highlights Edition 32



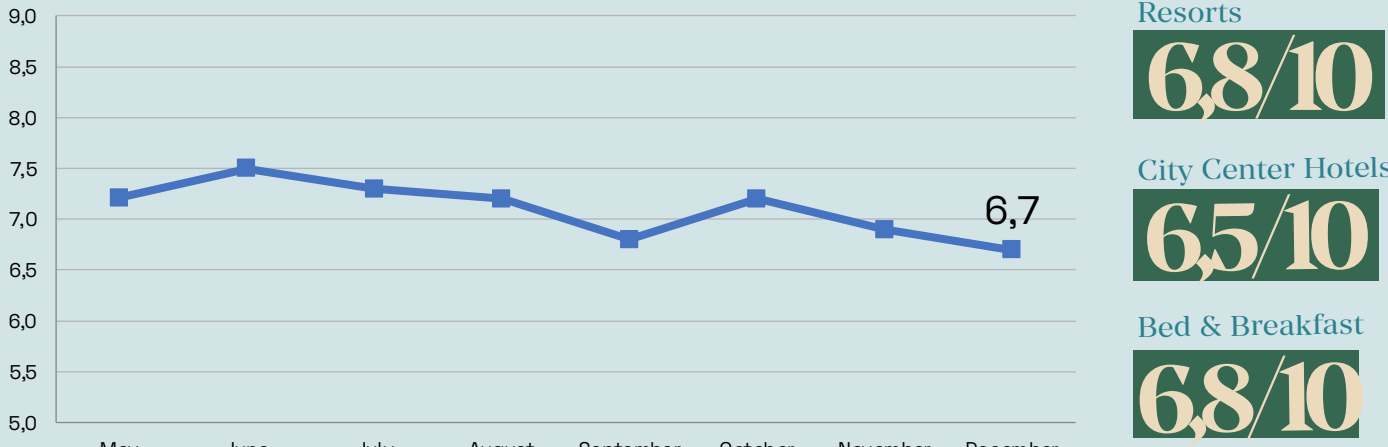
Welcome to the **32nd** edition of the Hotelier PULSE Report, where we cover the latest market trends and industry sentiments for hotels worldwide.

## Hotel Industry Optimism dips in December 2022



**December 2022** shows a **dip** in the industry's optimism about **business performance** over the next 12 months. Hoteliers surveyed in now rank business optimism **6,7 out of 10.**

Hotel optimism



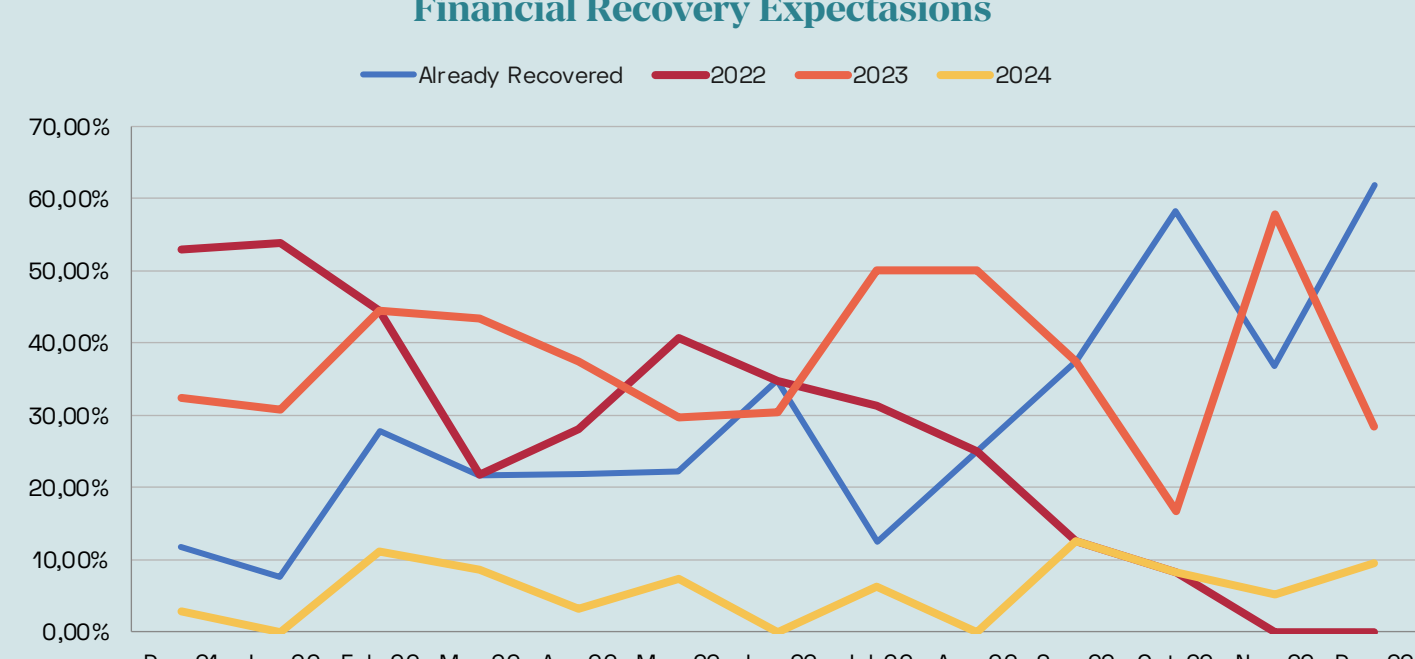
## Over Half of Hoteliers have already Financially Recovered to 2019 Levels

In December 2022, with the new year on the horizon, **nearly 62% of Hoteliers** surveyed report that they have already financially recovered to 2019 levels, vs just **36%** who reported the same in our November 2022 edition.

### Financial Recovery Forecast by Market Segment:

**Nearly 89% of Resorts** have already recovered to 2019 levels, while **just over 11%** expect to recover in 2023.

Financial Recovery Expectations



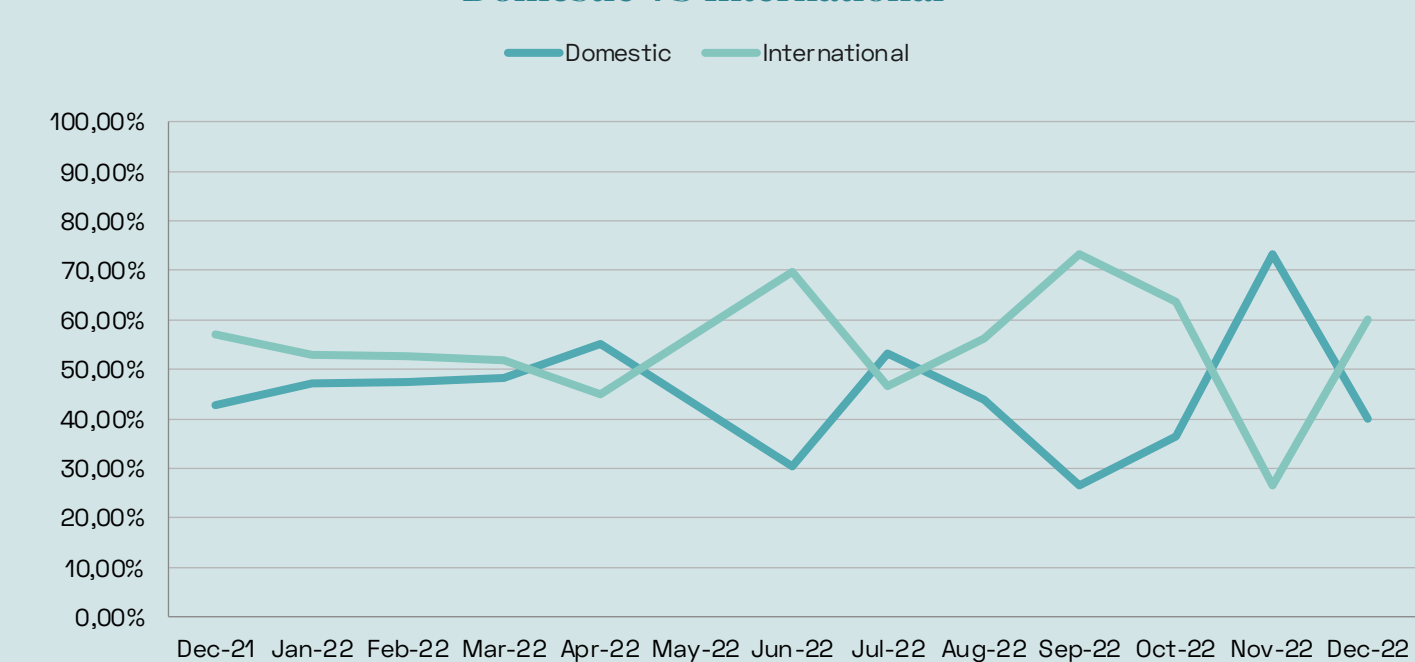
**Over 57% of City Center Hotels** expect to recover to 2019 levels next year, while **over 43%** have already financially recovered to 2019 levels.

## Over 80% of Hoteliers Revenue to increase in 2022, with over 47% of Respondents expecting an increase of 50% or more!

## Leisure Travel confidence continues to Boom, with Shifting Expectations Regarding Domestic vs International Travel

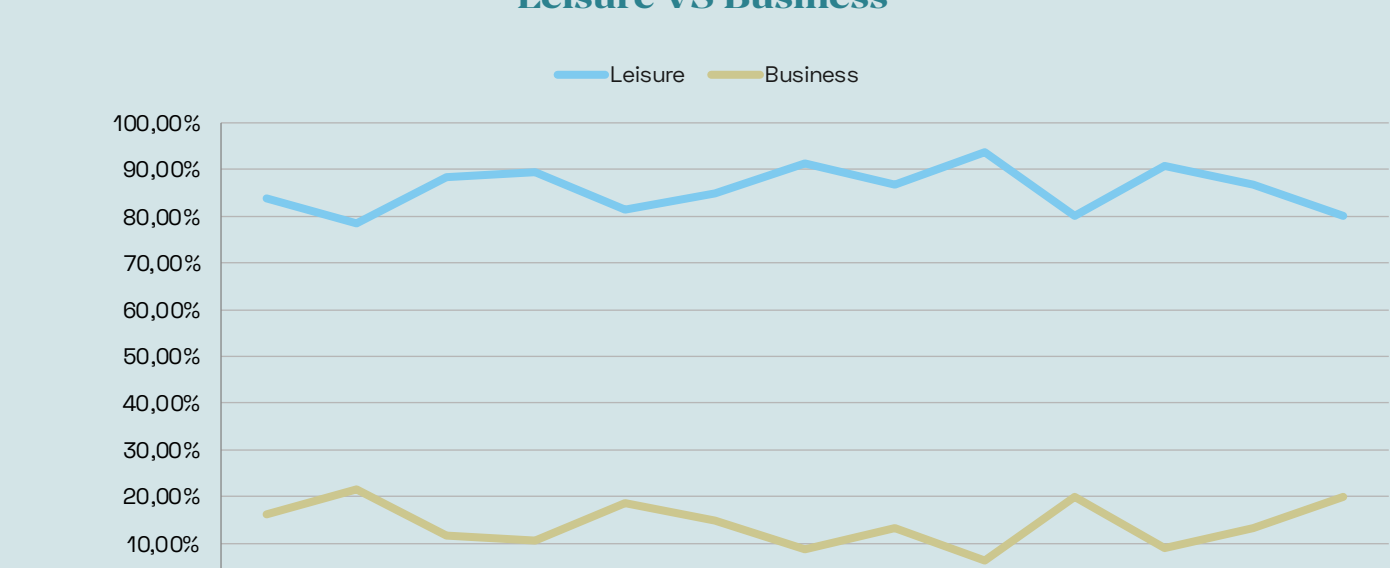
In our **November 2022** edition, we saw the industry shift expectations towards domestic travel as the strongest contributor to recovery in the coming year. Today, **60% of Hoteliers** surveyed for our December 2022 edition (vs 26,6% in November) expect International Travel to significantly contribute to hotel recovery, while **40% (vs 73,3%)** expect the same of domestic travel.

Domestic VS International



The expectation for **Leisure Travel** is still booming, with **80%** expecting this market segment to significantly impact recovery, vs just **20%** who expect the same of Business Travel

Leisure VS Business



## ADR Expectations Increase for the Next 12 Months

December 2022 shows ADR is expected to increase on the next 12 months - ranking **5,5** on a scale of 1 to 7, vs **4,8** in November.



Hotel expectations



## Hoteliers increasing Focus on Domestic Travel

While the majority of Hoteliers surveyed in November 2022 are continuing to prioritize their direct channel performance, recent months have shown an increasing focus on sustainability. In our December 2022 edition, we also see that Hoteliers are increasing focus on Domestic Travel & Staycations.

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