



**Horwath HTL**

*Hotel, Tourism and Leisure*

# 2022 Philippines Hotel Industry Survey of Operations

2021 Calendar Year



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## Foreword by Horwath HTL Asia Pacific

The Horwath HTL is pleased to present the 2022 Philippines Hotel Industry Survey (Calendar Year 2021).

This year's study attracted a total of 43 participating hotels, which accounted for 11,665 rooms. This represents a growth of participating rooms by 32 percent YoY. We are excited to continue growing the reach of this study.

The Philippines continued to be impacted by the Covid-19 pandemic in 2021. International arrivals saw a further decline of 89 percent YoY, registering a mere 0.16 million compared to 1.48 million in 2020. However, it was positive to see that with support of domestic demand, occupancy showed a notable improvement. Among survey participants, occupancy increased from 49 percent in 2020 to 59 percent in 2021. On the other hand, ADR remained soft, decreasing by 19 percent YoY from PHP 2,893 in 2020 to PHP 2,332 in 2021.
















Lastly, I would like to offer our heartfelt appreciation to all survey participants for your longstanding support of this publication. We are grateful for any feedback or comments you may have to offer that will assist us in continuing to improve the utility of this survey.

**Robert Hecker**  
Managing Director  
Horwath HTL Pacific Asia

# Annual Study Honorary Advisory Board

(in alphabetical order)

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## Market and Survey Introduction

The benchmark data presented in this survey of operations for the hotel industry offers users a baseline reference on the operational performance of hotels in each category by and large. With great emphasis on presenting accurate benchmarks, the following fundamentals on the results presented should be noted.

**Service Charges:** In accordance to local industry practice, all respective departmental revenues, ADR and RevPAR are not inclusive of Service Charges.

**Government Subsidies:** All respective department revenues and payrolls are excluding of government subsidies.

**Previous Year Comparisons:** The derivation methods of the previous year data (presented in the Summary of Results), has been retroactively adjusted to be consistent with the current year's practice. On this note, the calendar year 2020 figures shown in this current 2022 study (calendar year 2021) might not be identical to 2021's study.

**Line Items:** Vertical totals and averages may not add up as each average indicator is based on the hotels that contribute data for each specific line item.

**Requisite Sample Size:** Each average benchmark figure will only be presented if the number of respondents is more than 10 percent of the total respondents in the respective column group. Anything less than 10 percent will be show as Not Available (N/A).

**Rate Classification:** Same as the previous year, in order to make consistent YoY comparison, hotels are grouped based on their FY2019 performance rather than achieved ADR in 2021, which generally substantially declined due to the Covid-19 pandemic. For new entrants, rate segment is given according to brand positioning and type/level of amenities offered.

## Explanation of Terms & Bases Used

Item	Description
<b>Rooms Revenue</b>	Revenues obtained from guests' accommodation rented on a part-day, full-day or longer period basis.
<b>Food Revenue</b>	Revenue derived from the sale of food and non-alcoholic beverages in restaurants, in-room dining, mini bar, banquets and/or catering.
<b>Beverage Revenue</b>	Revenue derived from the sale of alcoholic beverages.
<b>Other Operated Departments Revenue</b>	Revenues generated from laundry, health centre, swimming pool, valet and other operated department revenues not mentioned.
<b>Miscellaneous Income</b>	Revenues related to a third party or revenues that do not incur any direct operating expenses, including foreign currency transaction gains (losses), income from rental of stores and showcases, commissions, cancellation penalties, cash discounted earned, etc.
<b>Cost of Food Sales</b>	Includes cost of food and non-alcoholic beverages served to guests, together with transportation and delivery charges, at gross invoices price less trade discounts. The cost of employees' meals is charged to the appropriate department and does not constitute a part of the cost of food sold.
<b>Cost of Beverage Sales</b>	Represents the cost of alcoholic beverages served to guests or used in the preparation of mixed drinks, at gross invoice price less trade discounts, plus import duties, transportation and delivery charges. The cost of employees' beverages is charged to the appropriate department and does not constitute a part of the cost of food sold.
<b>Cost of Other Operated Departments Sales</b>	Represents the cost from laundry, health centre, swimming pool, valet and other operated department revenues not mentioned.
<b>Payroll &amp; Related Expenses</b>	Comprises of expenses associated with salaries, wages and bonuses and payroll-related expenses for employees. Also included are the employee benefits such as social insurances, medical allowance, vacation and holiday pay, goods and services to employees free of charge or at markedly reduced price, employee' meals.
<b>Rooms Other Expenses</b>	Represents non-payroll expenses for the room department, including the expenses of cable/satellite, television, cleaning supplies, commissions, complementary services and gifts, guest supplies, linen, printing and stationery, royalty fees, equipment rentals, corporate office reimbursable, etc.
<b>Food and Beverage Other Expenses</b>	Represents non-payroll expenses for food and beverage department, including china and glassware, cleaning supplies, decorations, guest supplies, laundry, linen, music and entertainment, menus and beverage lists, silver and uniforms.
<b>Other Operated Departments Other Expenses</b>	Represents non-payroll expenses for all other operated departments, including laundry supplies, health centre and swimming pool supplies, etc.
<b>Undistributed Expenses</b>	This classification is used for (1) administrative and general expenses, (2) sales and marketing expenses, (3) information and telecommunications systems expenses, (4) utilities costs, and (5) property operation and maintenance expenses. Each of these can be considered as an individual entity. The explanations of each category expense are as follows:



	<ul style="list-style-type: none"> <li>• <b>Administrative and general expenses</b> include cash overages or shortages, commissions on credit cards, collection charges, executive office expenses, general insurance, postal charges, legal expenses, trade association dues, travelling expenses, accounts and consultants' fees.</li> <li>• <b>Sales and marketing expenses</b> include advertising, sales, promotion, merchandising, public relations and research, plus applicable travel and entertainment expenses and supplies.</li> <li>• <b>Information and telecommunications systems</b> expenses include cost of phone calls, internet services, software licenses and maintenance, software as a service fee, hosting storage fees and technical support fees.</li> <li>• <b>Utilities expenses</b> which include the cost of electrical power, fuel, steam and water.</li> <li>• <b>Property operation and maintenance expenses</b> include the cost of repairing buildings, electrical and mechanical equipment and fixtures, floor coverings, furniture, grounds and landscaping plus the cost of electric bulbs, mechanical supplies and removal of waste matter.</li> </ul>
<p><b>Three levels of profit in this study</b></p>	<ul style="list-style-type: none"> <li>• First level is the Departmental Profit/Loss.</li> <li>• Second level is the Gross Operating Profit (sum of department profits less undistributed operating expenses).</li> <li>• Third level is the Earnings before Interest, Taxes, Depreciation and Amortization (Gross Operating Profit less management fees and non-operating income and expenses).</li> </ul>

## Participating Properties

Admiral Hotel Manila – MGallery  
Clark Marriott Hotel  
Conrad Manila  
Courtyard by Marriott Iloilo  
Crown Plaza Manila Galleria  
DusitD2 Davao & Dusit Thani Residence Davao  
Dusit Thani Mactan Cebu Resort  
Dusit Thani Manila  
Fairmont Makati & Raffles Makati  
Grand Hyatt Manila  
Hilton Clark Sun Valley Resort  
Hilton Manila  
Holiday Inn & Suites Makati  
Holiday Inn Baguio City Centre  
Holiday Inn Manila Galleria  
Marco Polo Ortigas Manila  
Marco Polo Plaza Cebu  
Marriott Hotel Manila  
Microtel by Wyndham Tarlac  
New World Makati Hotel  
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Park Inn by Radisson Bacolod  
Park Inn by Radisson Clark  
Park Inn by Radisson Davao  
Park Inn by Radisson North EDSA  
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Red Planet Manila Mabini  
Red Planet Manila Makati  
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Sofitel Philippine Plaza Manila  
Swiss-Belhotel Blulane  
The Heritage Hotel Manila  
Valero Grand Suites by Swiss-Belhotel Makati

## About Horwath HTL Asia Pacific

**At Horwath HTL – Asia Pacific (HHTL)** is the regional arm of Crowe Global’s Hotel, Tourism and Leisure Consulting Group. Since its establishment in 1987, HHTL has been involved with thousands of projects throughout the region in all phases of the property lifecycle for clients ranging from individually held businesses to the world’s most prominent hotel companies, developers, lenders, investors and industrial corporations. HHTL currently operates out of offices in Singapore, Hong Kong, Beijing, Shanghai, Jakarta, Kuala Lumpur, Sydney, Mumbai, Tokyo, Auckland and Bangkok.

By combining resources from our offices in key cities throughout the Asia Pacific region, we ensure that clients receive a multi-skilled international perspective for their projects and benefit from our wide-reaching industry contacts. We are also supported by the Horwath HTL database, the largest and most complete hotel and tourism related database in the world. HHTL offers a wide range of services at all stages of the property lifecycle. Grouped under three broad areas, our services include the following:

### Planning & Development Services

- Strategic Planning
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- Market Research
- Macro Tourism Analysis
- Tourism, Project and Destination Master-planning
- Site Analysis
- Highest and Best Use
- Product Conceptualization
- Facilities Recommendation
- Market and Financial Feasibility
- Residual Land Valuation
- Hotel Management Company Selection
- Management Contract Negotiation

### Asset Management Services

- Owner Representation
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- Loan Work-out

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