

2023 Indonesia Hotel Industry Survey of Operations

2022 Financial Year



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Foreword by Horwath HTL Asia Pacific

Horwath HTL is pleased to present the 2023 Indonesia Hotel Industry Survey (Financial Year 2022), generated for 25 years in collaboration with the Indonesian Hotel and Restaurant Association (PHRI), Bali Hotels Association (BHA), Jakarta Hotels Association (JHA), and Riung Priangan.

This year's study attracted a total of 239 participating hotels, which accounted for 43,379 rooms. This represents a similar number of participating rooms YoY.

We are excited to continue growing the reach of this study back to pre-Covid levels in 2024. 2022's international arrivals to Indonesia grew a massive 350 percent, YOY to just under 5.5 million (vs 16.1 million in 2019). Given the predominance of domestic tourists and the tapering in new supply growth, the Indonesian hotel market recorded a solid recovery in occupancy in 2022 to around 57 percent from a weak 42 percent in 2021.

Horwath HTL has become far more optimistic about the future potential, since markets reopened in 2022 and foreign tourist numbers bounced back.

There are still global red flags for future growth, including global inflation and reduced consumer spending, the ongoing Ukraine invasion by Russia and the tepid relationship between China and the United States but "revenge tourism" has helped buoy the market. With the renewal of arrivals from China, the massive growth in the Indian market and the world's love of Bali, the future is bright.



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 Asia Pacific

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Explanation of Terms & Bases Used

Item	Description
Rooms Revenue	Revenues obtained from guests' accommodation rented on a part-day, full-day or longer period basis.
Food Revenue	Revenue derived from the sale of food and non-alcoholic beverages in restaurants, in-room dining, mini bar, banquets and/or catering.
Beverage Revenue	Revenue derived from the sale of alcoholic beverages.
Other Operated Departments Revenue	Revenues generated from laundry, health centre, swimming pool, valet and other operated department revenues not mentioned.
Miscellaneous Income	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, cancelation penalties, cash discounted earned, etc.
Cost of Food Sales	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.
Cost of Beverage Sales	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.
Cost of Other Operated Departments Sales	Represents the cost from laundry, health centre, swimming pool, valet and other operated department revenues not mentioned.
Payroll & Related Expenses	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.
Rooms Other Expenses	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.
Food and Beverage Other Expenses	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.
Other Operated Departments Other Expenses	Represents non-payroll expenses for all other operated departments, including laundry supplies, health centre and swimming pool supplies, etc.
Undistributed Expenses	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

	<p>these can be considered as an individual entity. The explanations of each category expense are as follows:</p> <ul style="list-style-type: none"> • Administrative and general expenses 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. • Sales and marketing expenses include advertising, sales, promotion, merchandising, public relations and research, plus applicable travel and entertainment expenses and supplies. • Information and telecommunications systems expenses include cost of phone calls, internet services, software licenses and maintenance, software as a service fee, hosting storage fees and technical support fees. • Utilities expenses which include the cost of electrical power, fuel, steam and water. • Property operation and maintenance expenses 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.
<p>Three levels of profit in this study</p>	<ul style="list-style-type: none"> • First level is the Departmental Profit/Loss. • Second level is the Gross Operating Profit (sum of department profits less undistributed operating expenses). • Third level is the Earnings before Interest, Taxes, Depreciation and Amortization (Gross Operating Profit less management fees and non-operating income and expenses).

About Horwath HTL Asia Pacific

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
- Market Entry Strategy
- 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

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