

2023 ASEAN Hotel Industry Survey of Operations

2022 Calendar Year



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Foreword by Horwath HTL Asia Pacific

Horwath HTL is once again pleased to present the 2023 ASEAN Hotel Industry Survey of Operations. This study presents results gathered from Horwath HTL's Industry Surveys and refers to calendar year 2022.

In this issue of the ASEAN Hotel Industry Survey, aggregated results of 76 established top-tier hotels with 26,522 keys in Bangkok, Ho Chi Minh City (HCMC), Hanoi, Jakarta, Kuala Lumpur, Manila and Singapore are presented as benchmarks.

We would like to extend our heartfelt appreciation to the hotel owners and managers participating in this year's study and our Honorary Advisory Board for their support in this study. We would also like to thank the Indonesian Hotel and Restaurant Association, Malaysia Association of Hotels and Singapore Hotel Association for their continuous support.



We hope to increase future participation from hotels and resorts in the region, so as to make this publication ever more representative.













Lastly, we are grateful for any feedback you may have to offer that will assist us in continuing to improve the utility of this survey. Please visit our website at www.horwathhtl.com and www.horwathhtl.asia to learn more about the services we offer and the publications we release throughout the region as well as elsewhere around the world.

Robert Hecker
Managing Director
Horwath HTL Pacific Asia

Annual Study Honorary Advisory Board

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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 exclusive of Service Charges, except Singapore where Room Revenue presented is inclusive of Service Charge.

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

Respondent Selection: In this survey, we included hotels that recorded average daily rates above a certain level for each city i.e., above USD 90 in Bangkok, above USD 110 in Ho Chi Minh City and Hanoi, above USD 105 in Jakarta, above USD 60 in Kuala Lumpur, above USD 75 in Manila, and above USD 225 in Singapore. The various rate levels have been selected to achieve a consistent grouping of hotels relative to quality levels across each market. It should be noted that the results presented in this study will be different from the ones in the individual country studies, given the differences in selection criteria.

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 2019 and 2021 figures shown in this current 2023 study (calendar year 2022) might not be identical to 2020 and 2022's studies.

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).

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 beverage 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.

<p>Undistributed Expenses</p>	<p>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:</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

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:

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