

HOTSTATS

Empowering You With Profit Intelligence

“Without data you are just
another person with an opinion”

William E Deming

Who is HotStats?



Benchmarking for Profit



12,500+
Hotels Worldwide



790+
Data Providers



160
Countries



500+
KPI's

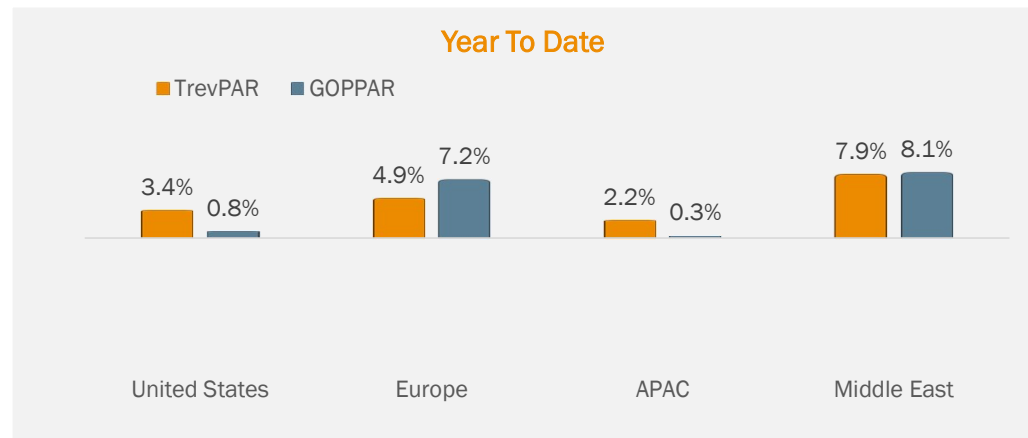
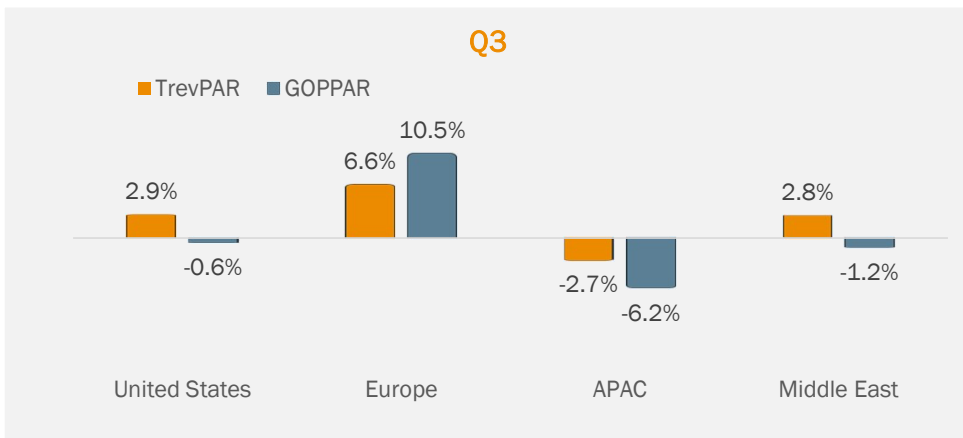
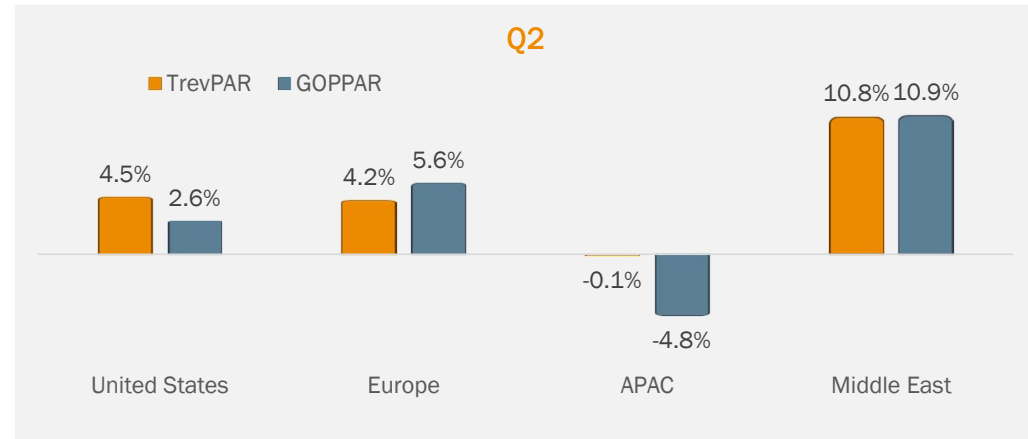
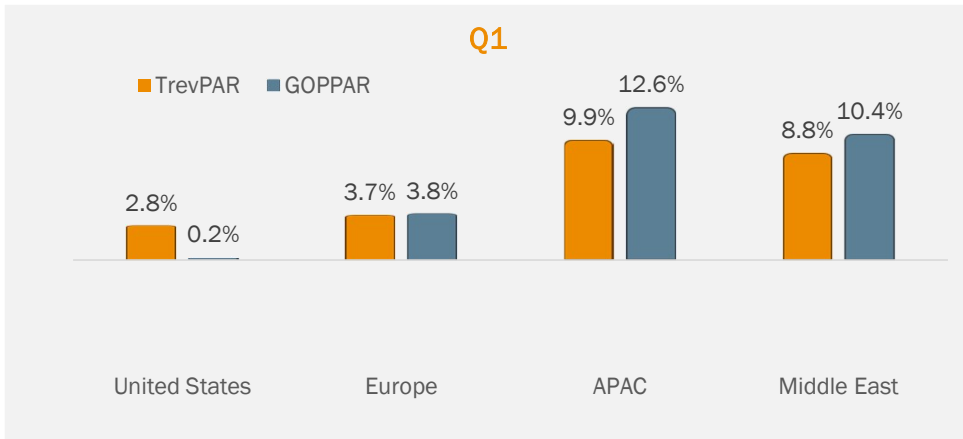
How the data is used



- Pre-opening and ongoing budgeting / Strategic planning / FP&A
- Re-positioning & ROI
- Asset Management / Business Model Benchmarking
- Total Revenue Management
- Feasibility & Underwriting investment
- Operational Reviews / Tracking performance – Owner / Operator Alignment
- Procurement & Cost control review
- Market Tracking & Industry updates

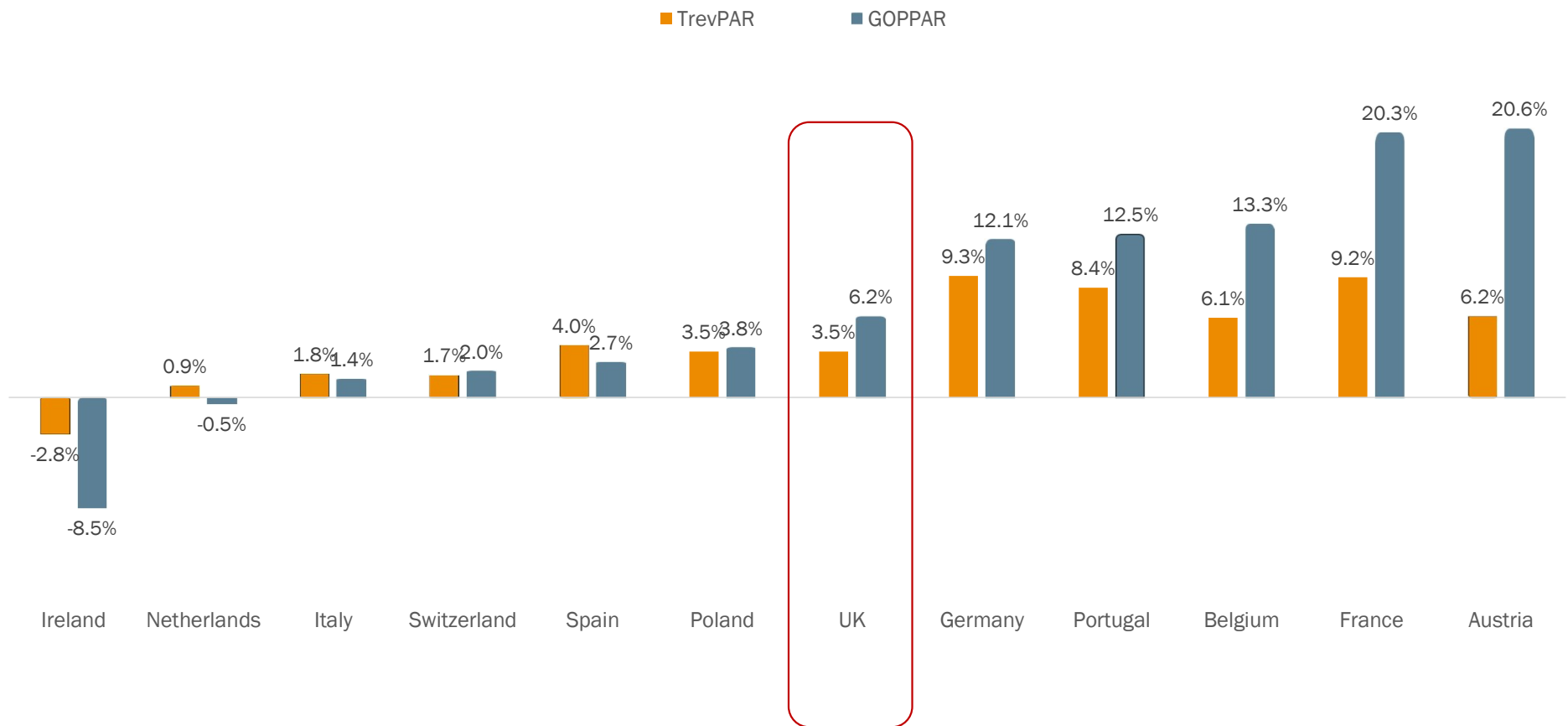
EMEA Looking Good

Year on Year – Revenue and Profit Variances



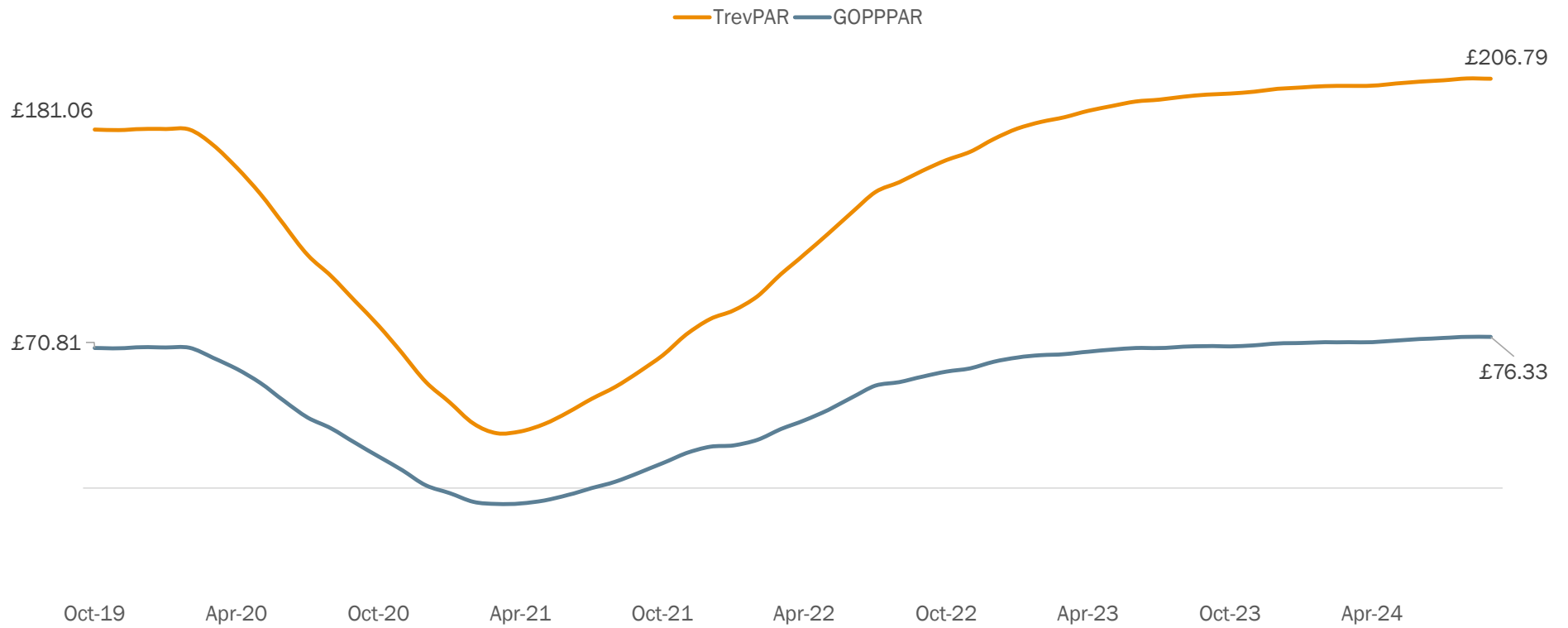
Sitting Mid-Table

Revenue and Profit Variance Year on Year – YTD



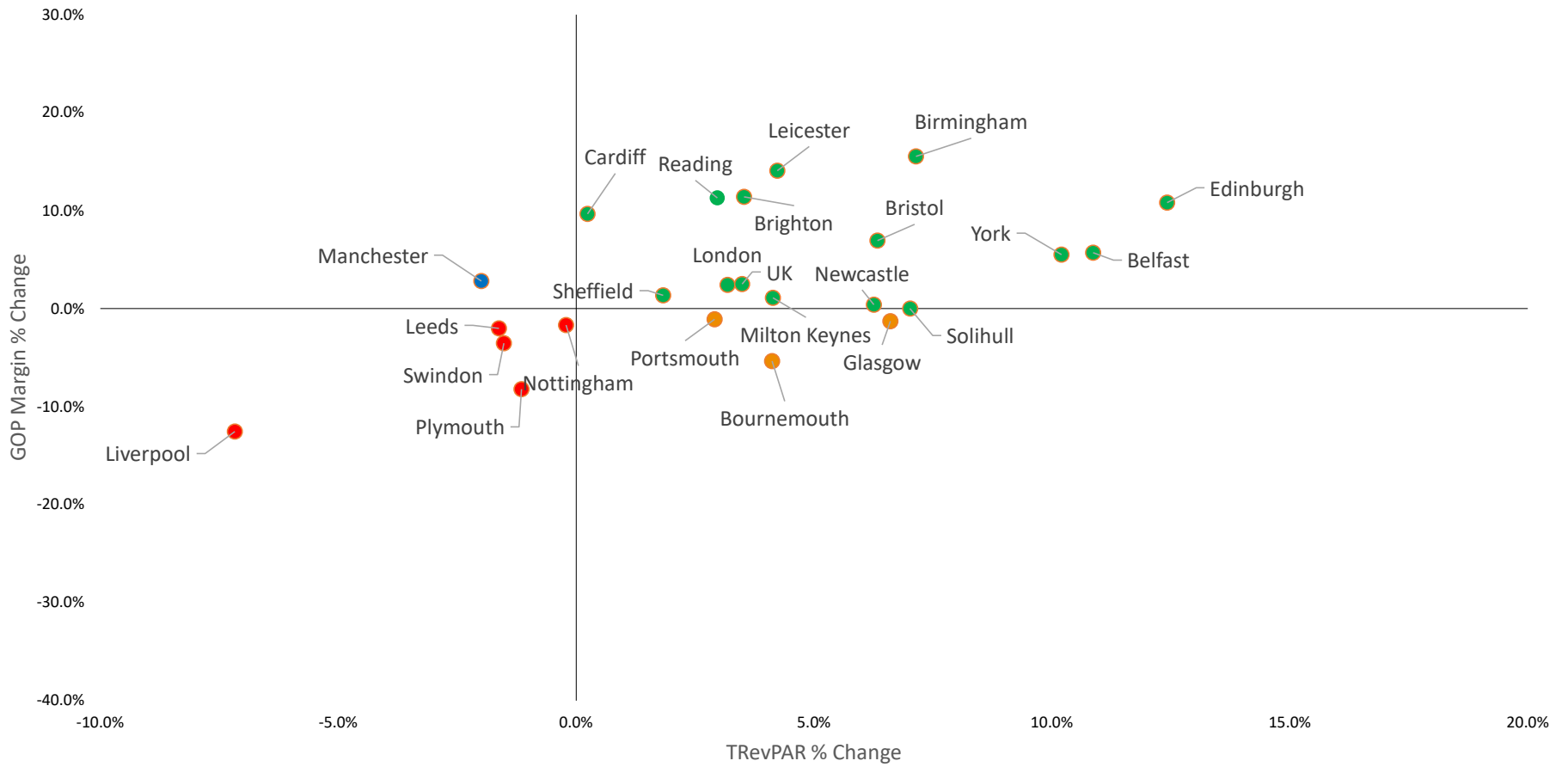
Slowing but Growing

Revenue and GOP Per Available Room – UK – 12 Month Moving Average



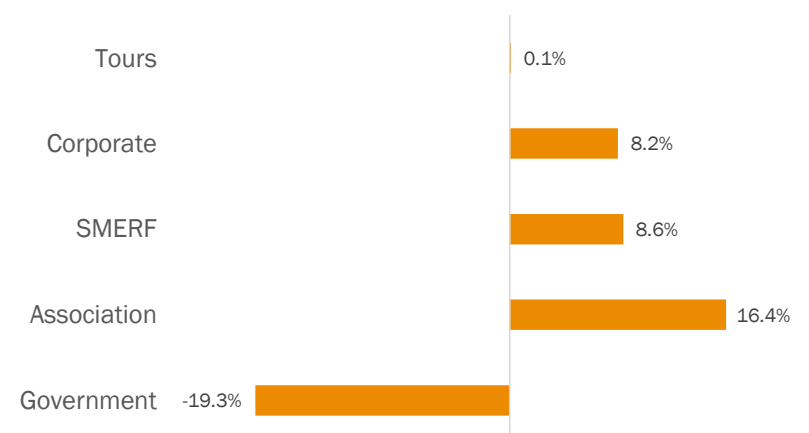
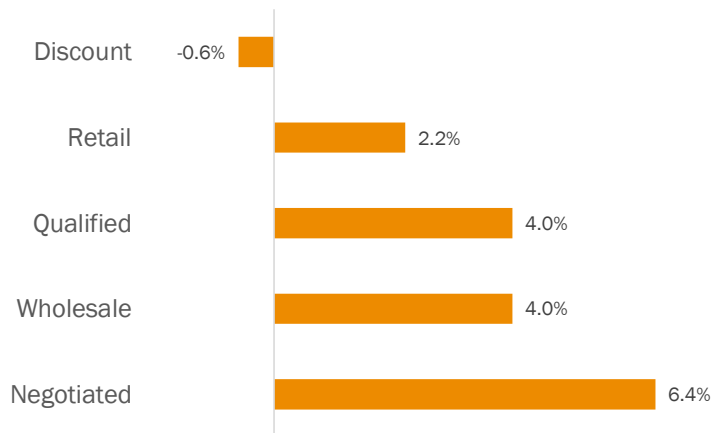
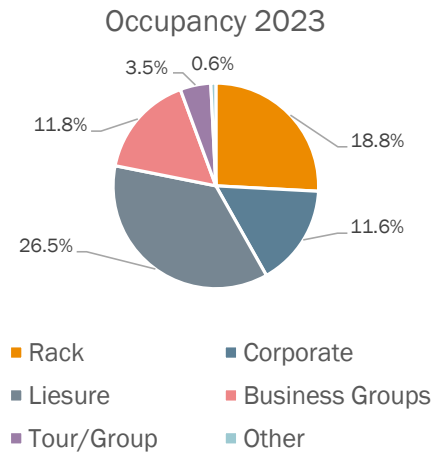
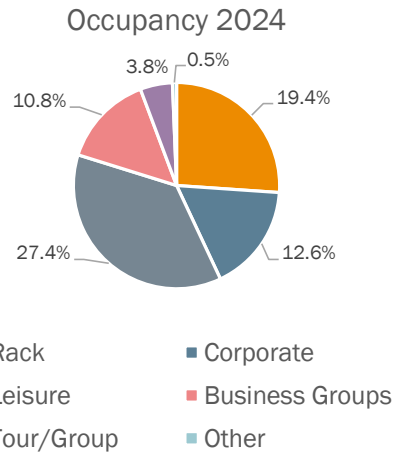
The Matrix

TRevPAR % Change vs GOP Margin % Change - YTD: 2024 vs 2023



Rooms for Improvement

Occupancy & Rate Analysis



Other Revenues

Revenue per Room Sold 2024 vs 2023 YTD

Golf



+9.1%

Wellness



+8.1%

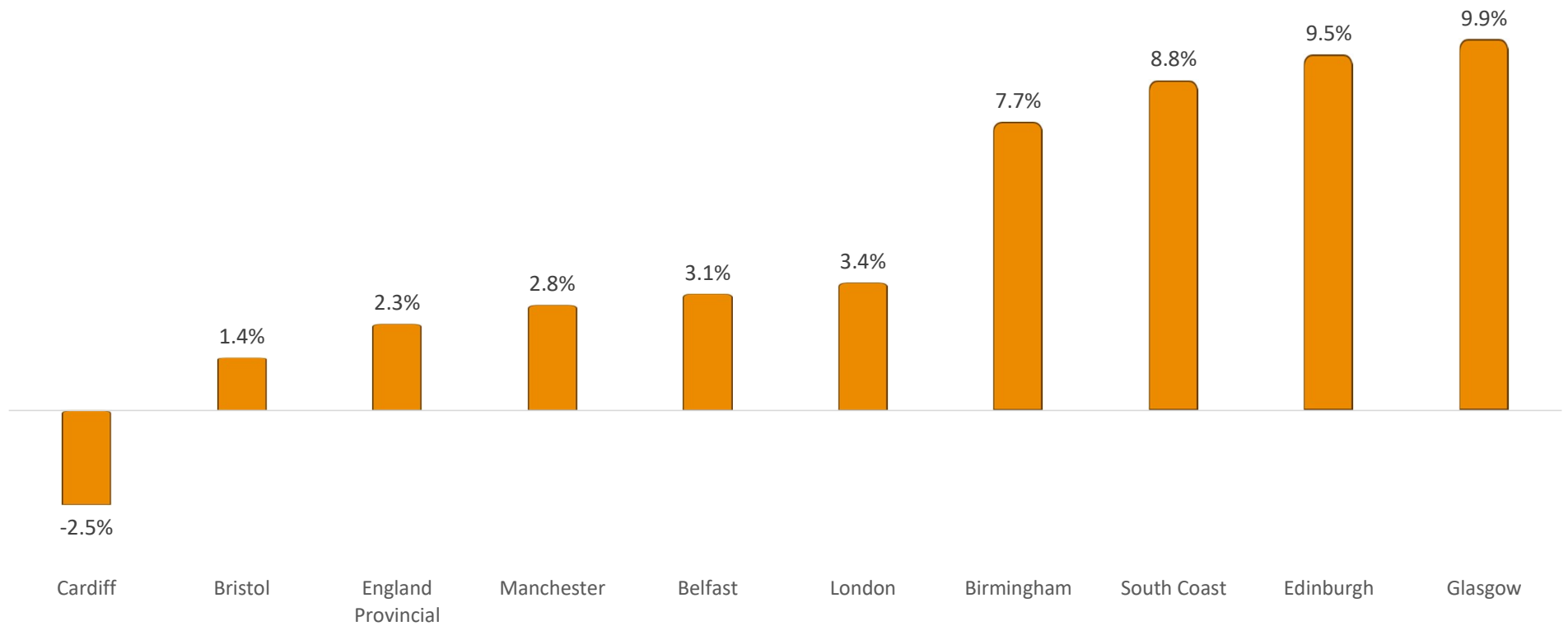
Parking



+7%

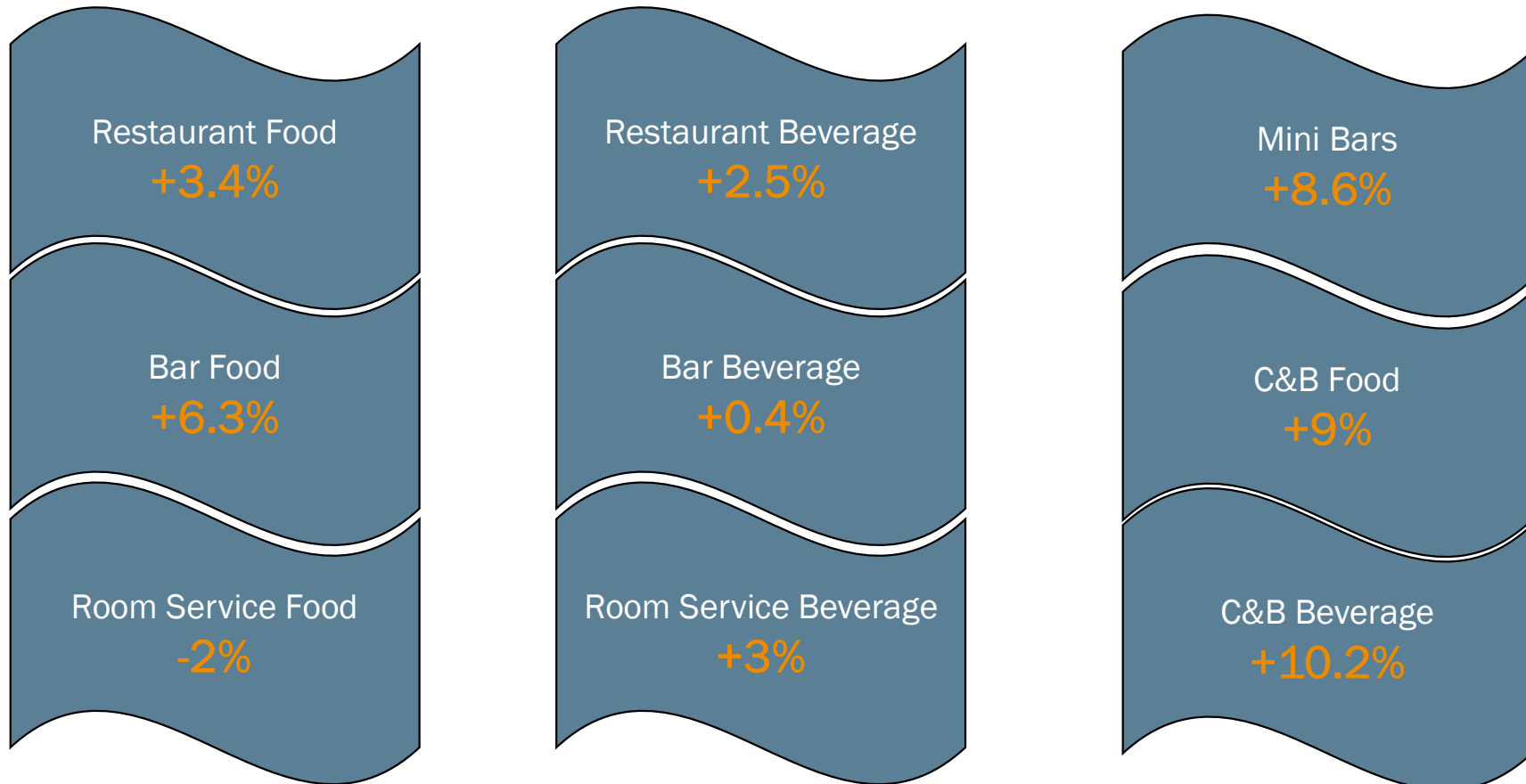
Summer Nights..

F&B Outlet Revenue PAR – June - Aug - 2024 vs 2023



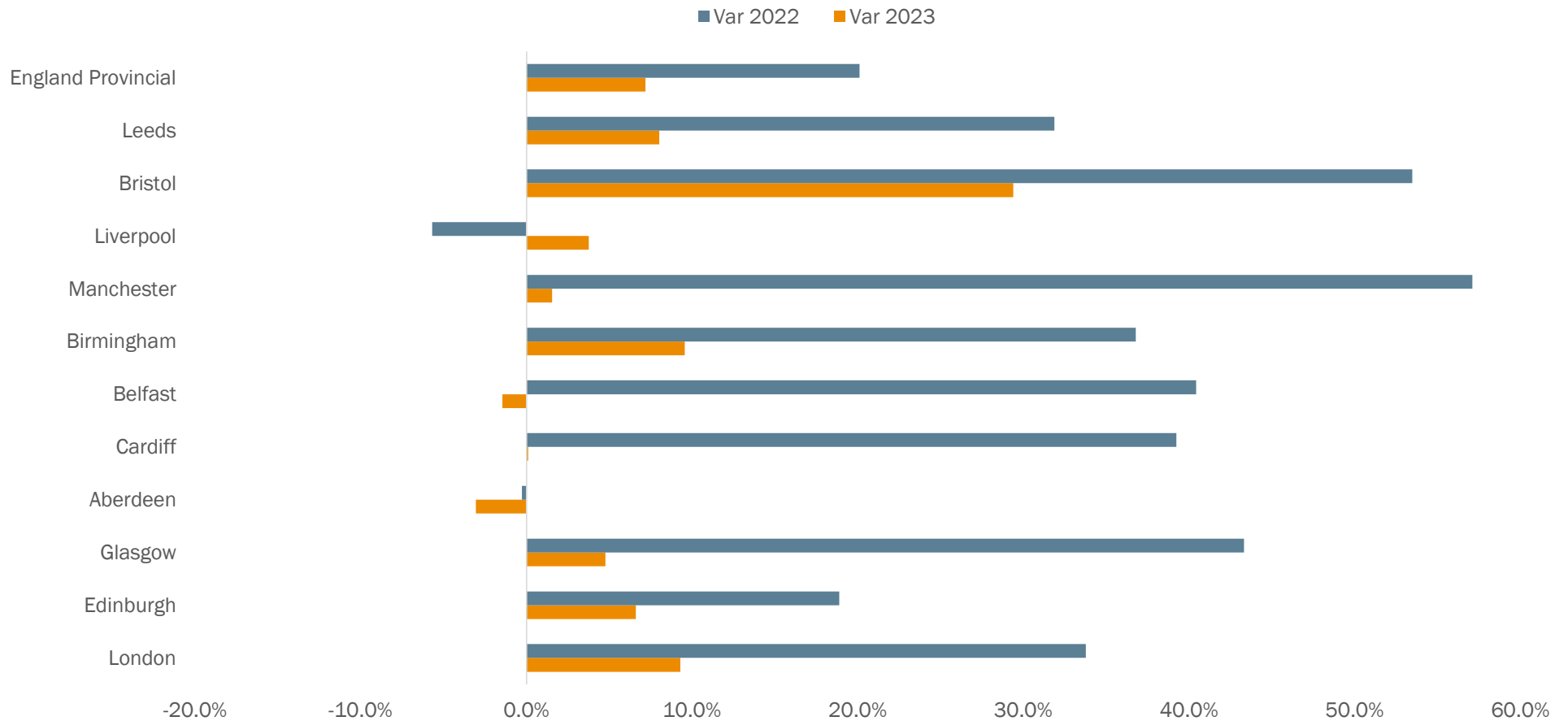
Food for Thought?

Revenue per Available Room – 2024 vs 2023 YTD – United Kingdom



Now you C&B me..

Conference & Banqueting Revenue per Sqm Year to Date





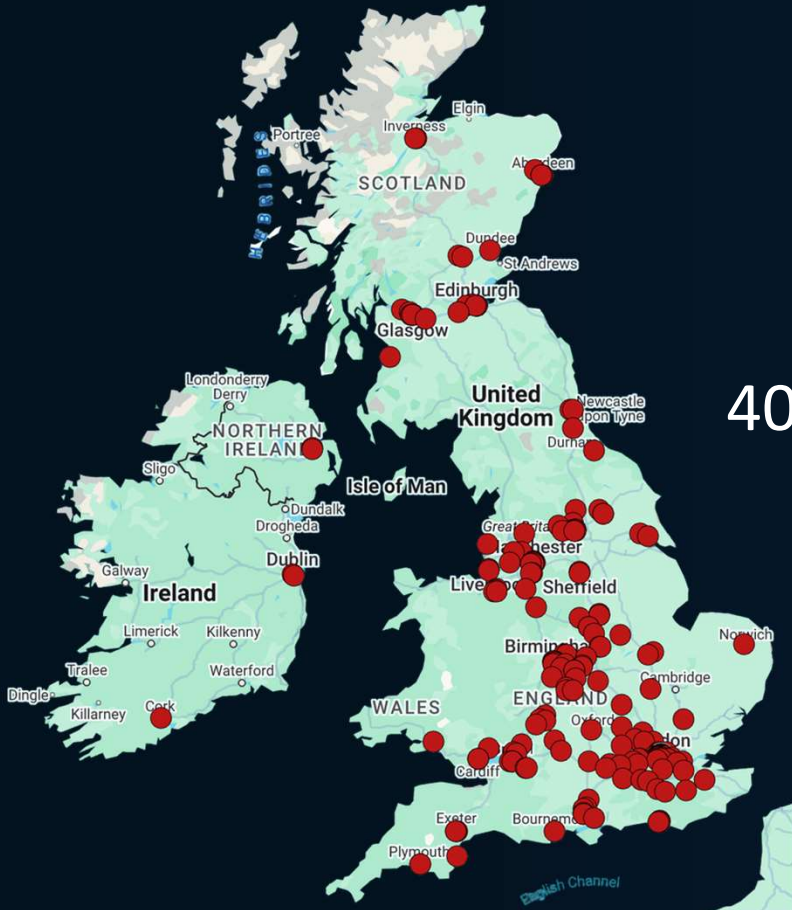
Unified Data Model

for M&E Benchmarking



Think STR, but for M&E

VENUE PERFORMANCE



LEONARDO Hotels

Aimbridge

Hilton

WARWICK CONFERENCES

IHG HOTELS & RESORTS

Marriott HOTELS · RESORTS · SUITES

The Kings Fund

Royal College of Physicians

Klarent hospitality

EST. 1847 SEARCYS

One Birdcage Walk

Radisson HOTELS & RESORTS

APEX HOTELS

GEII CENTRE

VALOR

michels&taylor

DE VERE

IMAGO venues

edgbaston

One Great George Street

the hoxton

CROWNE PLAZA

THE BELFRY HOTEL & RESORT

RBH HOSPITALITY MANAGEMENT

CLERMONT HOTEL GROUP

PAN PACIFIC Hotels and Resorts

ROYAL MUSEUMS GREENWICH

IET The Institution of Engineering and Technology

BMA HOUSE LONDON

HAMILTON PYRAMID Europe

CAMM & HOOPER

Emirates Old Trafford

Partnerships



Stronger Together

Tech

Associations

DMOs

Govt

ORACLE
Hospitality

AMADEUS



 **Kinetic**

 **Guestline**

HOSPA
The Hospitality Professionals Association

beam



 **venues of excellence**



LONDON
CONVENTION BUREAU

marketing Manchester

meet
BRISTOL & BATH

Conference
Leeds.


Department for
Digital, Culture
Media & Sport


appg events

The Business of Events

This chart measures the average number of sales / events that occur in the month:

- - - - - Sales made during the month for any future date
- Events delivered in the month.

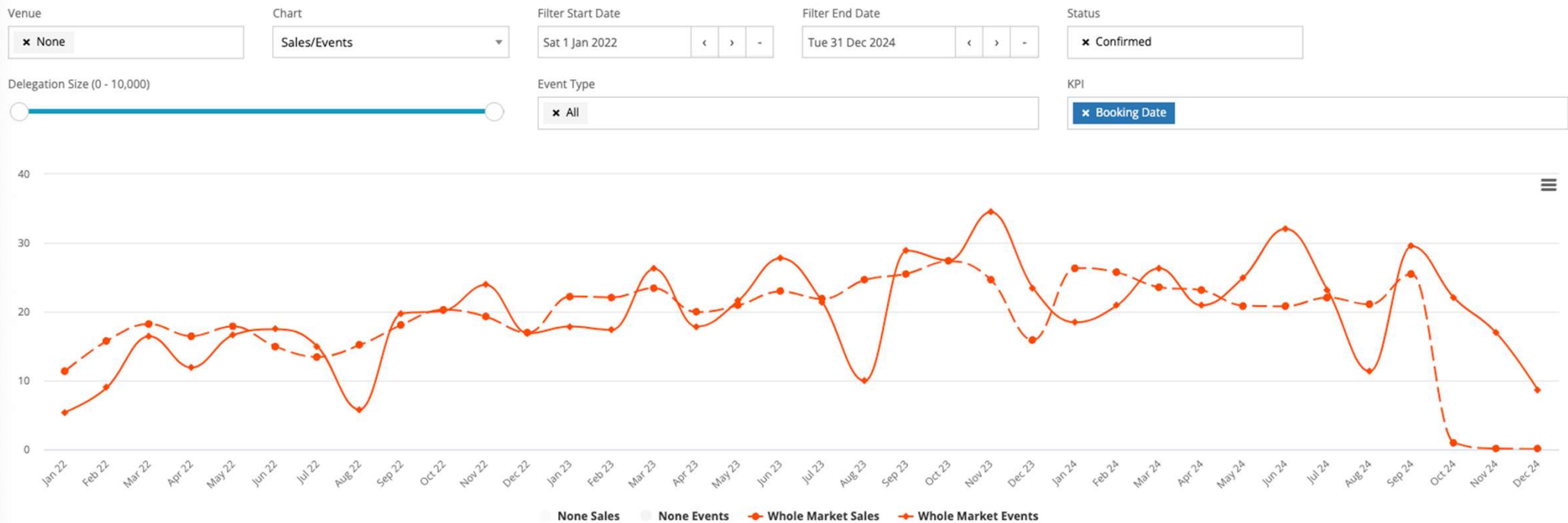
It also shows forward 'business on the books'.



This chart measures the average number of sales / events that occur in the month:

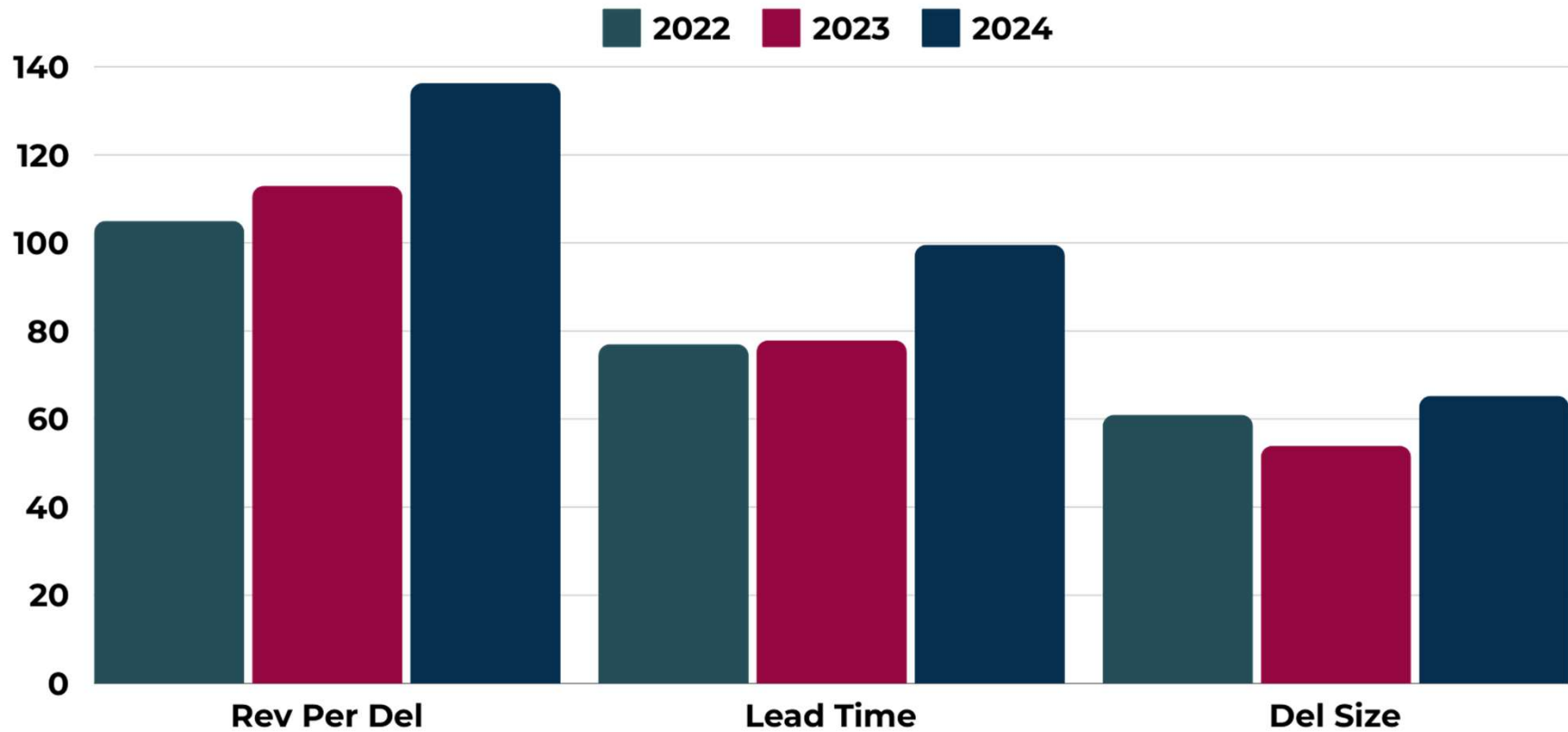
- Sales made during the month for any future date
- Events delivered in the month.

It also shows forward 'business on the books'.



KPI

All Events - All Sizes



This chart measures the average number of sales / events that occur in the month:

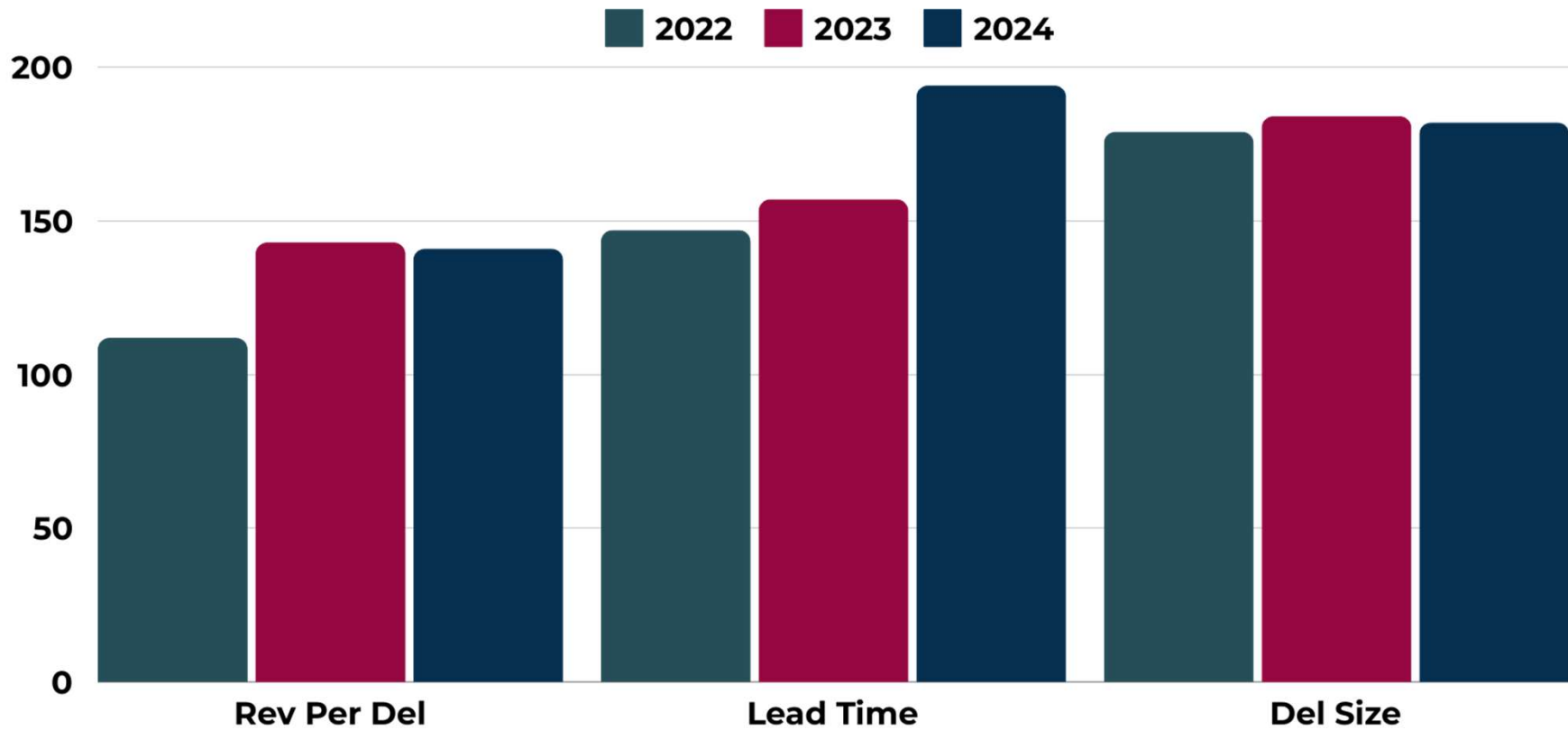
- Sales made during the month for any future date
- Events delivered in the month.

It also shows forward 'business on the books'.



KPI

Conferences (100-500)



This chart measures the average number of sales / events that occur in the month:

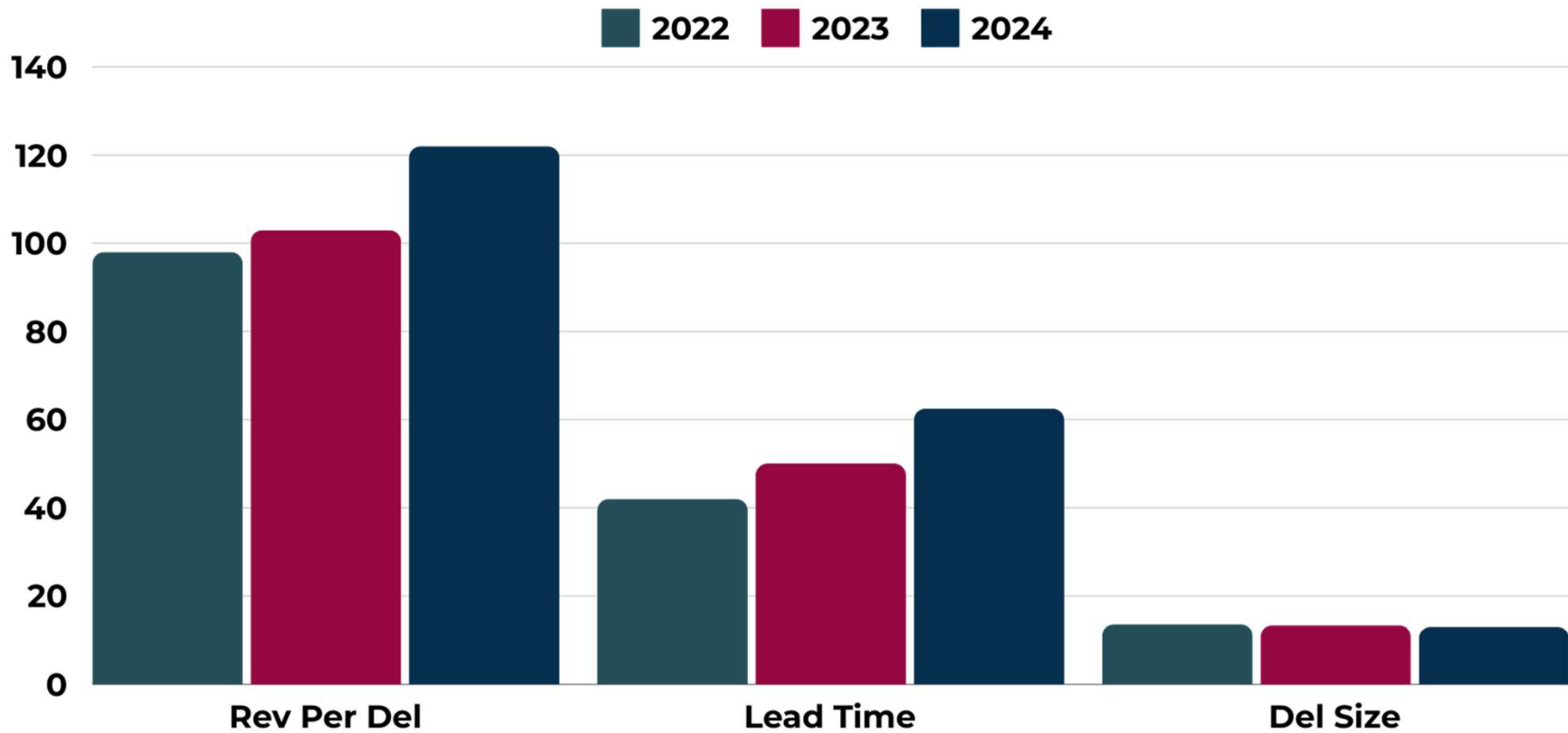
- Sales made during the month for any future date
- Events delivered in the month.

It also shows forward 'business on the books'.



KPI

Meetings (>30)

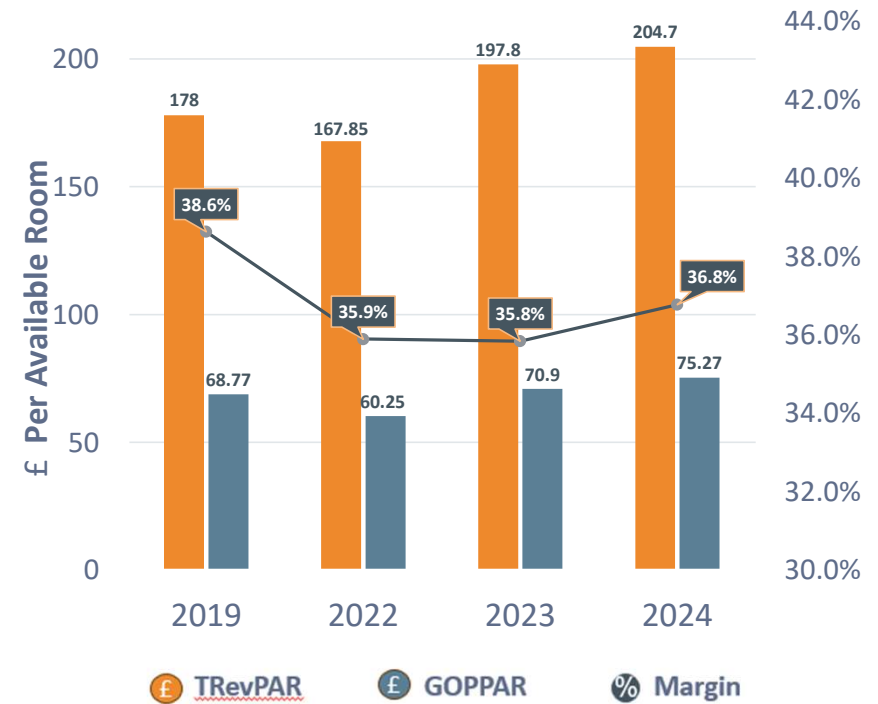
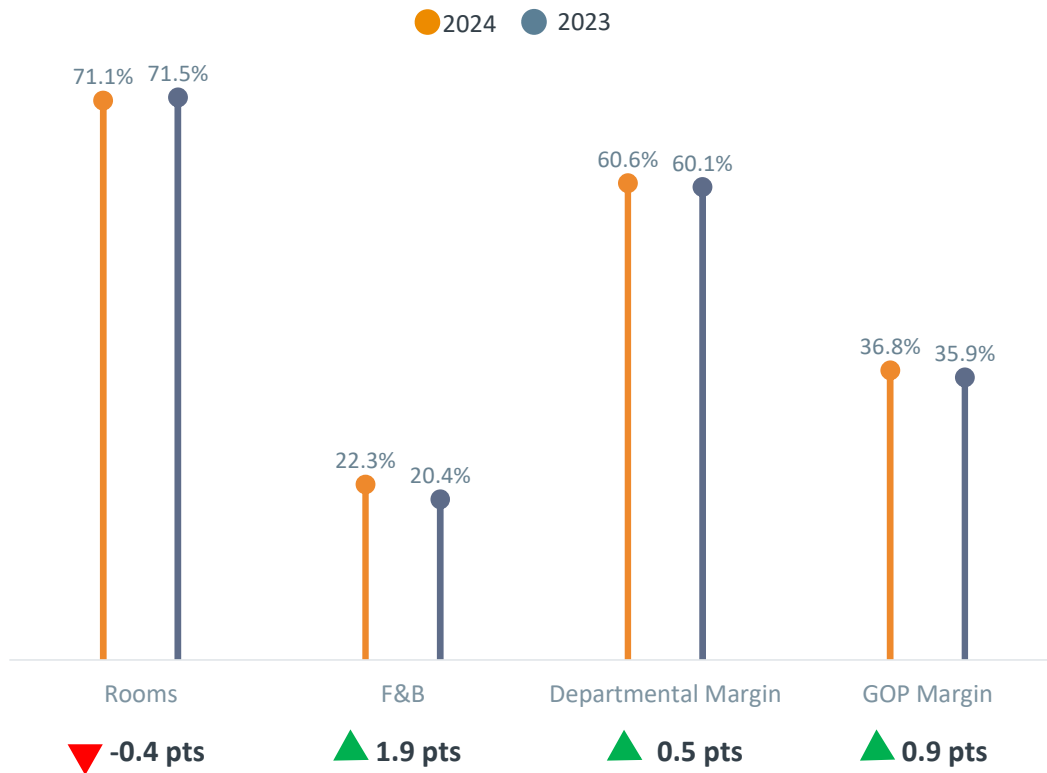


Summary

- UK M&E market is on a positive upward trend.
- Large events (sales) have been effected.
 - Possibly a lag due to: infl, int rates, gen elec, budget
- Meetings are growing.
- Market stabilising (return to normal?).

View from the Chopper..

Revenue and Profit Trends – Year to Date – UK



Is Labour the Answer?



Housekeeping
+11.5%

F&B
+5.2%

Spa/Health Club
+6.5%

Other Operating
+8.6%

Admin
+5.5%

**Sales &
Marketing**
+11.2%

**Property &
Maintenance**
+11.1%

Total Labour
+4.5%

Costs as a Tailwind?

CPOR
+0.5%

Booking Costs
-4.8%

Room Supplies
+3.1%

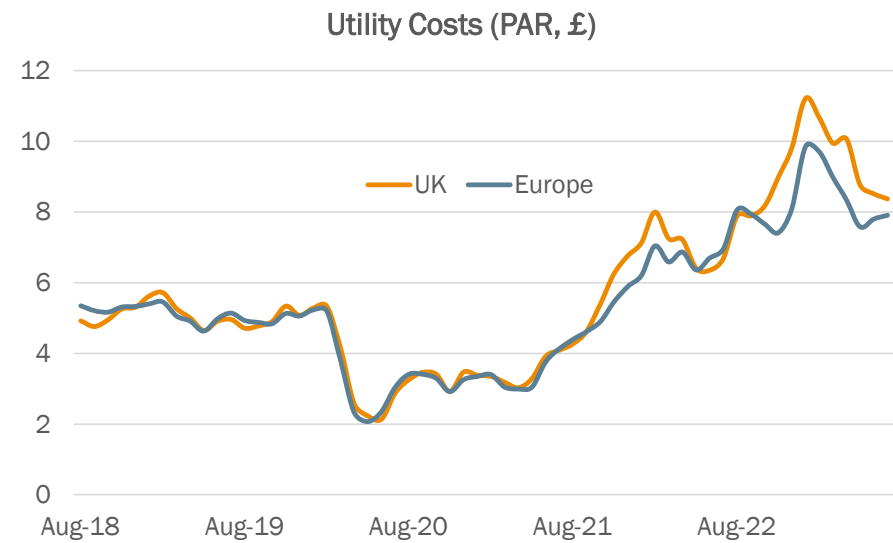
Food Cost
-1.3pps

Beverage Cost
-0.4pps

F&B Supplies
-1.5%

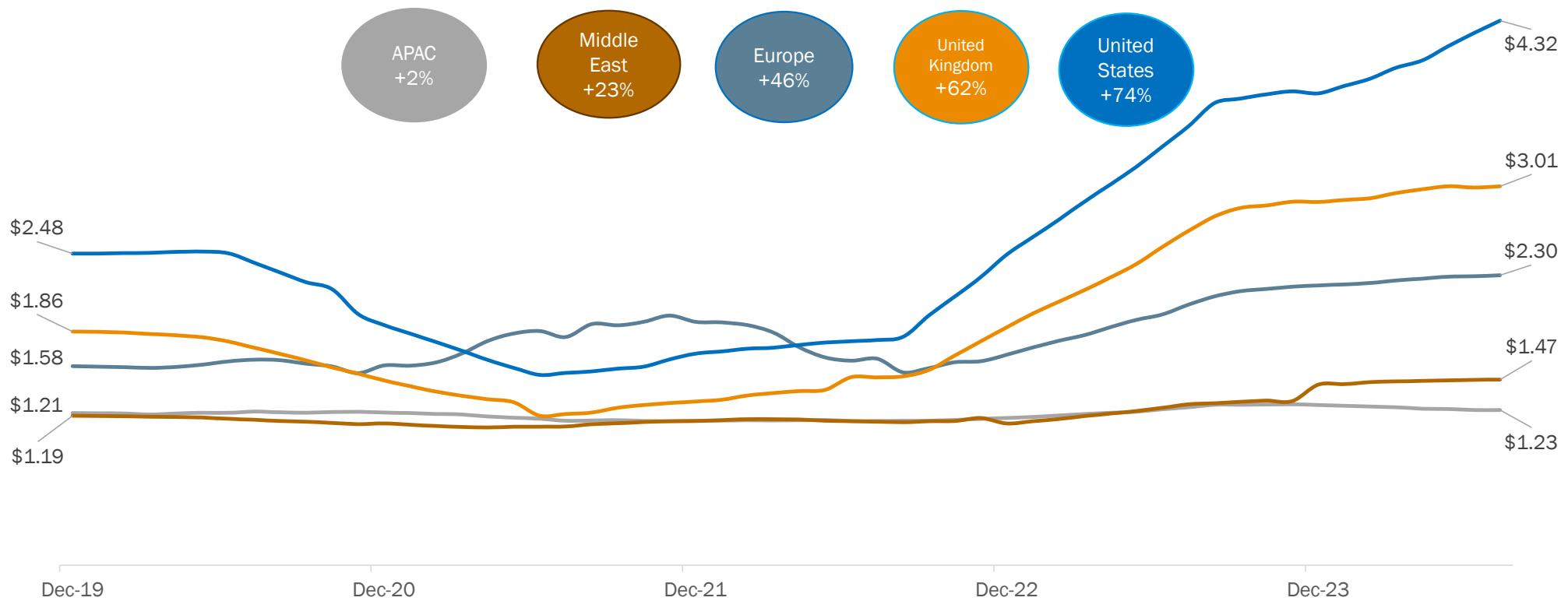
Undistributed Expenses
+7.2%

Utilities
-16.5%



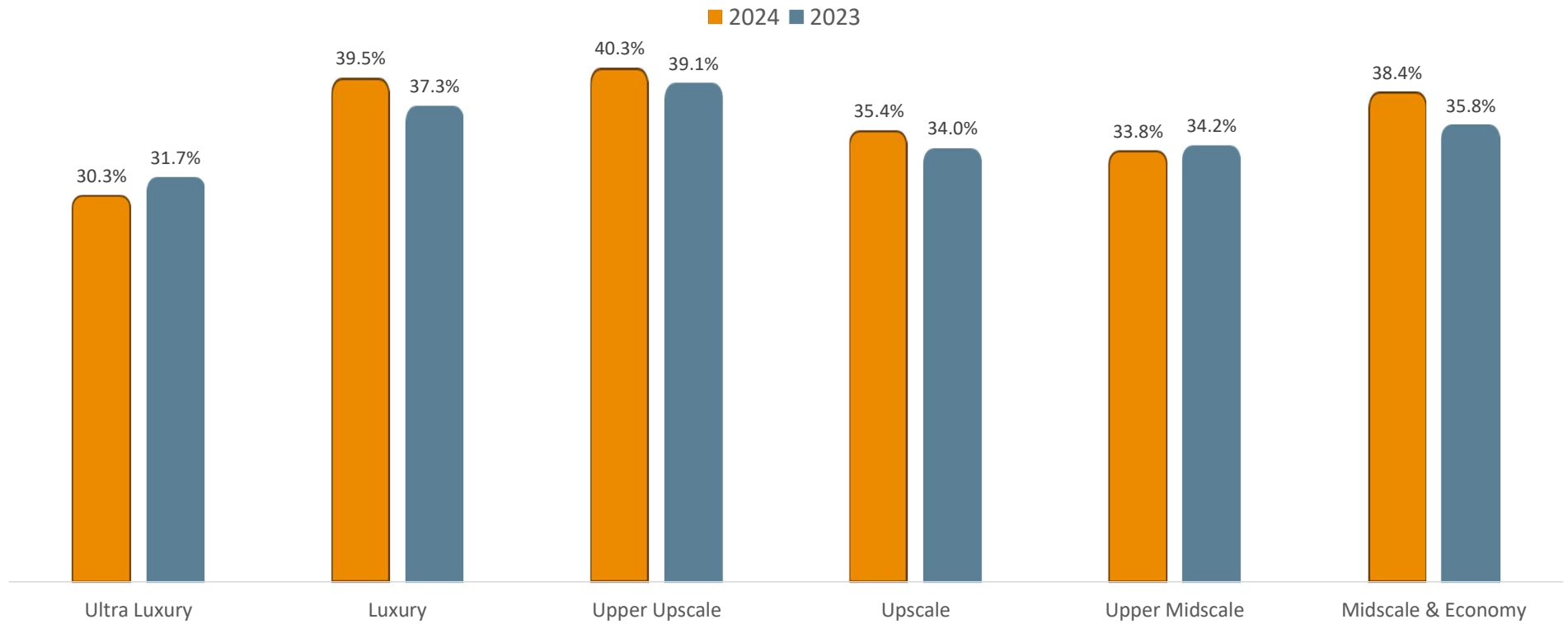
Insuring Success..

Total Insurance Costs Per Available Room(\$USD)



A Matter Of Scale

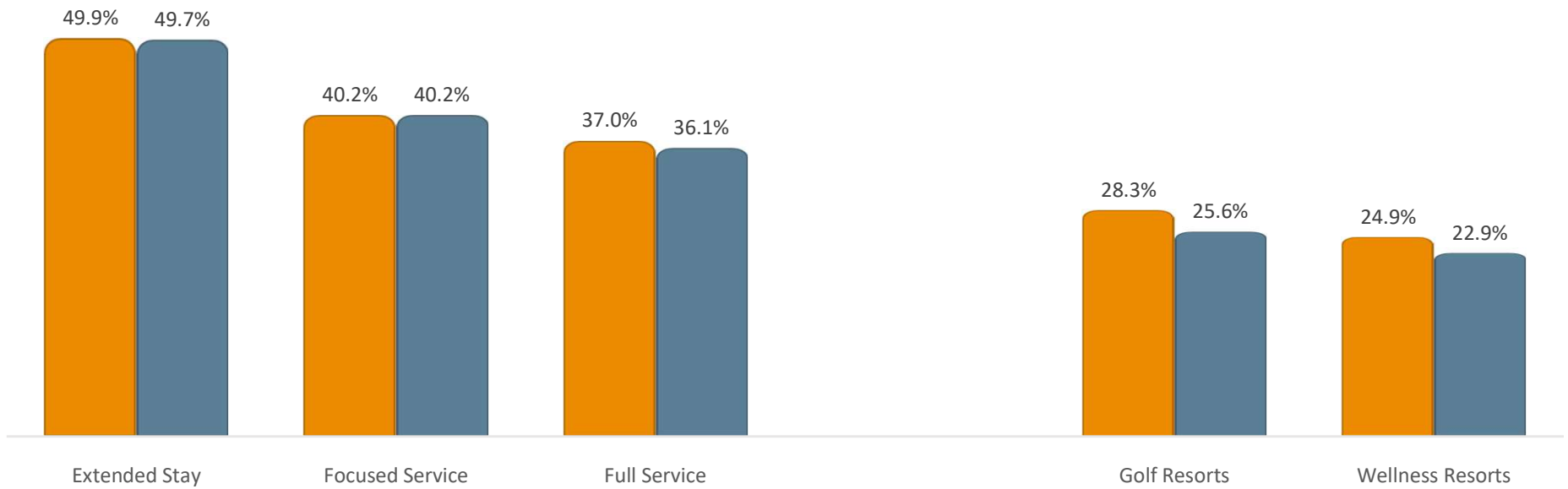
Gross Operating Profit Margin by Brand Scale – YTD – United Kingdom



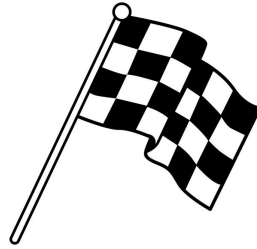
Not all Created Equally

Gross Operating Profit Margin – Year to Date – UK

■ 2024 ■ 2023



A Few notes to finish...



- Guest spend continues to rise, now closer aligned with inflation
- Growth in spend is higher in wellness and leisure activities continues to outpace rooms & F&B
- Further high street F&B chains set to close, may support hotel F&B
- C&B nearly back to 2019 levels, not adjusting for inflation
- Hotel F&B probability has improved year on year as costs have slowed
- Energy costs have fallen and supporting profit margin growth YOY

Questions?

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