Crowe Horwath 2013 Hotel Survey Results								
Overall Performance Measurements	Region		Classification			Size		
	Dublin	Rest of ROI	5 Star	4 Star	3 Star	1-49 Rooms	50-99 Rooms	100+ Rooms
Accommodation								
Occupancy Percentage	73.9%	60.4%	62.7%	65.3%	64.1%	55.7%	62.4%	66.5%
Average Room Rate	€86.04	€70.75		€75.87	€57.10		€71.31	€79.52
RevPAR	€63.58	€42.73	€87.47	€49.54	€36.60		€44.50	€52.88
Number of Guests per Room (average) Room Cost %	1.6 32.4%	1.8 37.9%	1.8 36.0%	1.7 34.8%	1.8 37.1%	2.0 43.4%	1.8 38.1%	1.7 33.5%
Percentage of Repeat Business	23.6%	29.6%	21.1%	30.6%	28.6%		27.0%	30.7%
Average Length of Stay	2.0	1.7	1.9	1.9	1.7	1.4	1.7	2.0
Overall Revenue Breakdown	%	%	%	%	%	%	%	%
Rooms	56.1	32.0	44.0	35.3	36.4	23.2	35.1	43.8
Food	24.3	38.5	31.0	37.4	34.5	42.9	37.1	31.3
Beverage	12.3	19.9	13.6	18.4	22.5	28.0	18.3	15.1
Other	7.3	9.6	11.4	8.9	6.6	5.9	9.5	9.8
Expenses Data	%	%	%	%	%	%	%	%
Payroll	34.0	40.7	43.6	38.9	36.9	39.5	40.8	38.4
Utility Costs	4.9	6.6	5.9	6.1	6.4		6.3	6.0
Administrative and General*	4.4	4.4	4.0	4.6	4.0		4.7	4.4
Marketing and Franchise Fees*	2.6	2.5 2.9	3.4 3.1	2.5	1.9	2.1	2.2	2.7
Property Operations and Maintenance* * Does not include payroll costs	2.4	2.9	3.1	2.4	3.3	2.2	3.0	2.8
Gross Operating Profit	% 29.8	% 16.1	% 16.0	% 20.6	% 19.5	% 14.7	% 16.7	% 22.8
Departmental Profit	%	%	%	%	%	%	%	%
Rooms	67.6	62.1	64.0	65.2	62.9	56.6	61.9	66.5
Food and Beverage	26.2	29.4	23.5	30.7	28.6	29.8	28.5	28.9
Other Departmental Profit	67.4	58.4	41.3	45.4	49.8	57.4	42.1	47.9
Profit Before Tax	% 23.9	% 10.7	% 10.8	% 15.2	% 14.3	% 9.7	% 11.7	% 16.7
Gross Margin	%	%	%	%	%	%	%	%
Food Beverage	69.6 67.3	67.7 65.9	67.6 67.0	68.7 66.4	67.5 66.3	66.8 65.8	67.6 65.9	68.8 66.6
Country of Origin	%	%	%	%	%	%	%	%
Republic of Ireland	44.3	71.2	52.1 6.5	68.4	60.3 7.4		65.1 7.5	61.4 6.5
Northern Ireland Great Britain (ie UK excl. NI)	4.8 14.5	8.5 7.8	10.7	7.4 8.2	7.4 11.4	12.0 6.7	7.5 9.5	10.3
Germany	3.9	2.7	2.7	2.8	3.4	2.1	3.4	2.9
France	4.1	2.0		1.8	3.4	1.4	2.6	2.7
Other Europe	9.4	1.6	2.3	2.7	6.4	1.4	2.8	4.7
USA	16.7	5.2	20.7	7.7	6.2	2.4	7.4	10.2
Asia	0.8	0.3	0.7	0.3	0.6		0.5	0.4
Other	1.5	0.7	2.2	0.7	0.9	0.3	1.2	0.9
Channel of Business	%	%	%	%	%	%	%	%
Direct Bookings (email, phone, walk-in)	27.5	49.4	47.3	46.9	37.1	57.3	45.1	39.1
Hotel Website	23.6	18.2	16.1	21.1	18.3	14.3	18.9	21.3
Third Party Website Travel Agent (Fully Independent Traveller - FIT)	24.7 6.2	15.4 2.3	9.7 5.4	13.4 3.8	26.2 2.6	16.5 3.9	18.6 3.0	17.3 4.2
Tour Operator (Tour Series & Adhoc Groups)	7.7	2.3 7.1	6.3	5.9	10.3		6.5	4.2 8.0
Conference & Incentive Agents	5.9	4.9	7.8	5.3	3.9		4.7	6.1
GDS (Global Distribution System)	4.4	2.7	7.4	3.6	1.6	0.3	3.2	4.0
Market Segment**	%	%	%	%	%	%	%	%
Corporate/Business	24.3	17.5	12.4	20.7	19.8	9.4	18.5	22.1
Leisure	41.7	52.8	51.3	46.4	50.8	51.9	52.9	47.1
Groups	11.4	9.5	13.8	8.8	11.0		10.0	10.7
Meeting Participants (MICE)	3.7	4.8	8.7	5.3	3.1	3.1	4.5	5.0
Web/Internet Bookings	13.4	10.2	9.3	10.9	12.0		10.4	9.9
Airline Other	1.2	0.3	0.2	0.4 7.5	1.0		0.1	1.1 4.1
**Refer to Explanation of Terms and Bases Used	4.3	4.9	4.3	7.5	2.3	10.6	3.6	4.1

Explanation of Terms and Bases Used

ACCOMMODATION

Occupancy Percentage

Rooms occupied by hotel guests on a paid basis.

Average Room Rate

The average room rate is defined as room sales divided by the total number of rooms occupied.

RevPAR

Revenue per available room is calculated by multiplying average room rate by annual occupancy level.

Rooms Cost %

Room costs as a percentage of room sales.

OVERALL REVENUE BREAKDOWN

Rooms

Revenues derived from the rental of sleeping rooms at the hotel, net of Value Added Tax and any rebates and discounts.

Food

Revenues derived from the sale of food, including coffee, milk and tea.

Beverage

Revenues derived from the sale of beverages, including beer, ale, wine and liquors.

Other

Revenues derived from all other sources, e.g. health club, spa, conferences, telephone, service charge etc.

EXPENSES DATA

Payroll

Payroll costs to include labour costs such as salaries, wages and employee benefits for all staff members.

Utility Costs

Utility Costs typically include electricity, fuel (oil, gas and coal), purchased steam and water, waste removal etc.

Administrative and General (A&G)

Included in this category are office supplies, computer services, accounting and legal fees, liability insurance, cash overages and shortages, bad debt expenses, travel insurance and credit card commissions.

Marketing & Franchise Fees

Marketing expense includes direct sales expenses, advertising and promotions, travel expenses for the sales staff and civic and community projects.

Franchise Fees includes all fees charged by franchise company including royalty fees.

Property Operation and Maintenance

This category includes the cost of maintenance supplies, cost of repairs and maintenance of the building, furniture and equipment and the grounds.

GROSS OPERATING PROFIT

Gross operating profit is defined as total revenue less all departmental and undistributed operating expenses.

DEPARTMENTAL PROFIT

Departmental profit is defined as the departmental sales less the departmental costs.

Rooms

Room costs (payroll and expenses) divided by room revenue, expressed as a percentage.

Food and Beverage (F&B)

F&B costs (payroll, cost of sale and payroll) divided by F&B revenue, expressed as a percentage.

Other Department Profit

Other expenses would comprise of those expenses, including labour, which offset the revenue generated by items in the corresponding revenue areas.

PROFIT BEFORE TAX

Profitability after accounting for operational costs. Profit before debt service.

GROSS MARGIN

Gross Margin is defined as revenue less costs of sales (excluding payroll).

COUNTRY OF ORIGIN

The country in which the booking originated in.

CHANNEL OF BUSINESS

The distribution channel which delivered the business to the hotel.

MARKET SEGMENT

Corporate / Business

Consortia, corporate direct and GDS bookings

Leisure

Direct individual leisure, FIT, leisure promotional rates

Groups

Groups delivering 10 rooms or more

MICE

Guests attending a meeting, incentive conference, conference or exhibition

Web/Internet

3rd party intermediary bookings, web direct bookings (if a promo code is given to a corporate booker these room nights should be allocated to the Corporate / Business market segment)

Airline

Aircrew room nights and delayed flight crew / passengers

Other

Room nights generated that do not pertain to the above market segments