

# Mews Data Dive: 2022 H1

Unpacking hospitality's performance in the first half of 2022

**MEWS**

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# Setting the scene

**Data is your friend. Not only does it tell you how you're doing compared to past performance, it also reveals trends and guides your future actions.**

Now, imagine you have easy access to a whole ocean of hospitality data, boiled down to a select few snappy insights. Welcome to the Mews Data Dive.

We anonymized the data from thousands of Mews properties and had a good rummage around to see what we could find. Get the headlines about how hospitality is performing, analysis about what it all means, and ideas for how to take advantage.

And of course, measure your own property's performance against our industry benchmarks.

**Here we go.**



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## Where we get our data from?

The data in this report is taken from active properties in 80 countries around the world, from the US to Australia. However, it is not an even distribution, and so the data you'll see is weighted towards Europe.

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# Occupancy

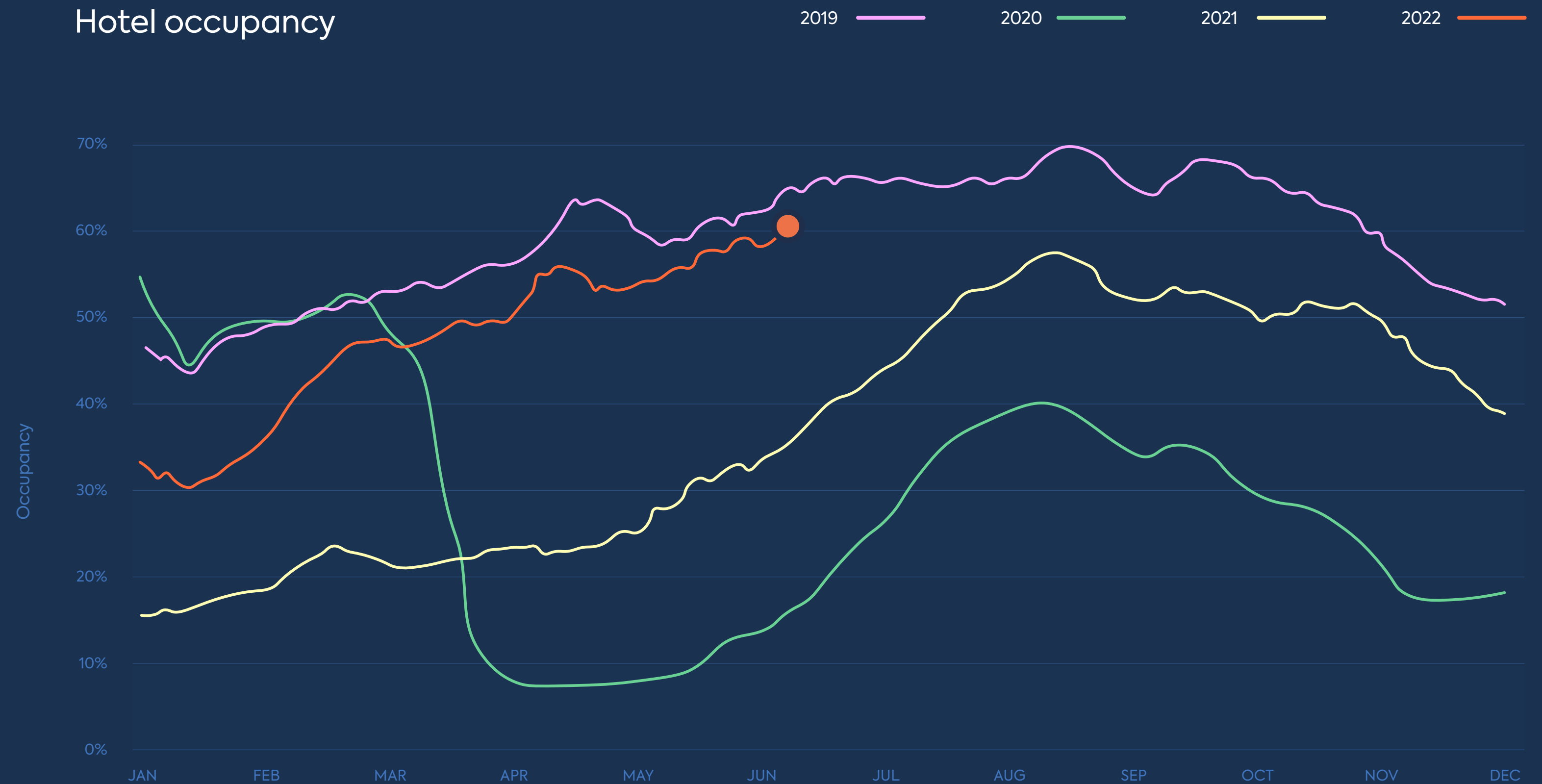
# Q1

## Headline news

After two incredibly difficult years (for reasons we don't need to go over again), occupancy is almost back at 2019 levels. For certain regions – for instance Spain, France, Germany, the Netherlands and the UK – occupancy levels have already reached parity, and the same is true for particular accommodation types such as apartment rentals.

When we look at month-on-month performance, there's also a positive trend from January through to June, which is broadly what we'd expect to see. Hotels and hostels follow a similar pattern of filling up as the year progresses, while occupancy in serviced apartments also increases as we reach the summer, albeit at a slower pace thanks to strong, consistent performances during the winter.

## Hotel occupancy



61%

Average hotel occupancy  
as of June 2022



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## Occupancy is almost back at 2019 levels.

For certain regions – for instance Spain, France, Germany, the Netherlands and the UK – occupancy levels have already reached parity.

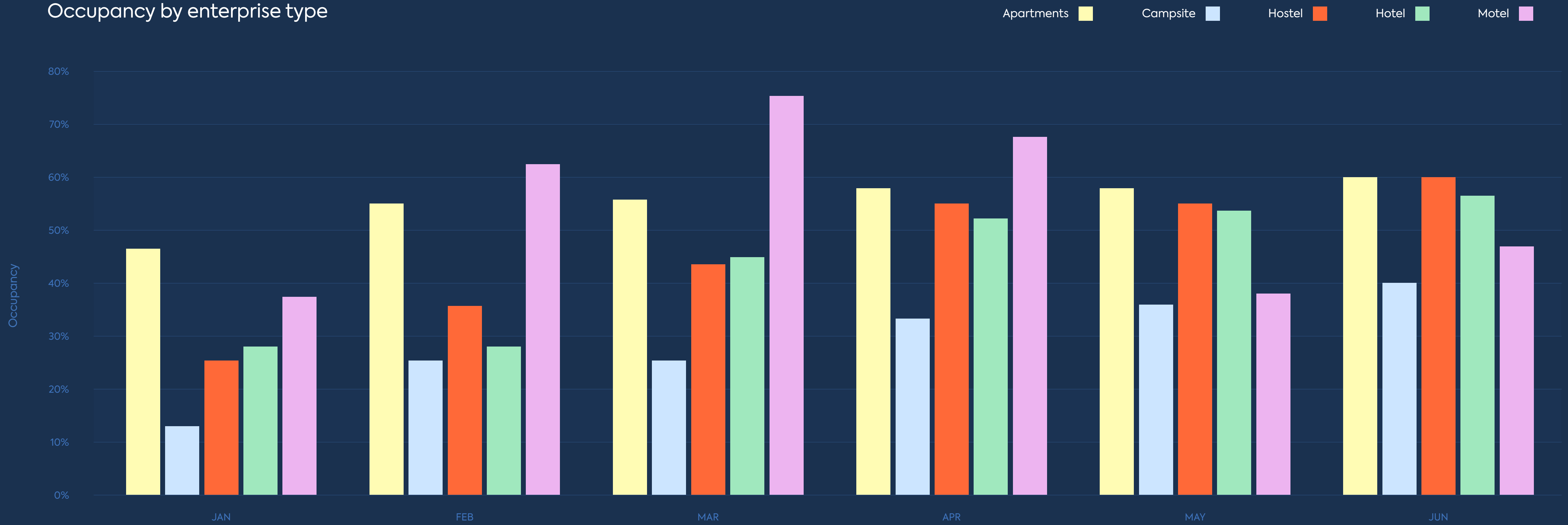


# What does this mean?

Cautious optimism has been hospitality's motto for the past year or so. Today, uncertainty remains as talk of a global recession continues, but in the short term at least, there are reasons to be cheerful. Record levels of leisure travel are expected during the summer as travelers look to make hay while the sun shines.

Hostels were the hardest hit during the pandemic, so to see their occupancy rates peaking above hotels from April through to June is very encouraging. Campsite occupancy is also on the rise as the northern hemisphere begins its warmer months, something explored in our [glamping report](#).

### Occupancy by enterprise type







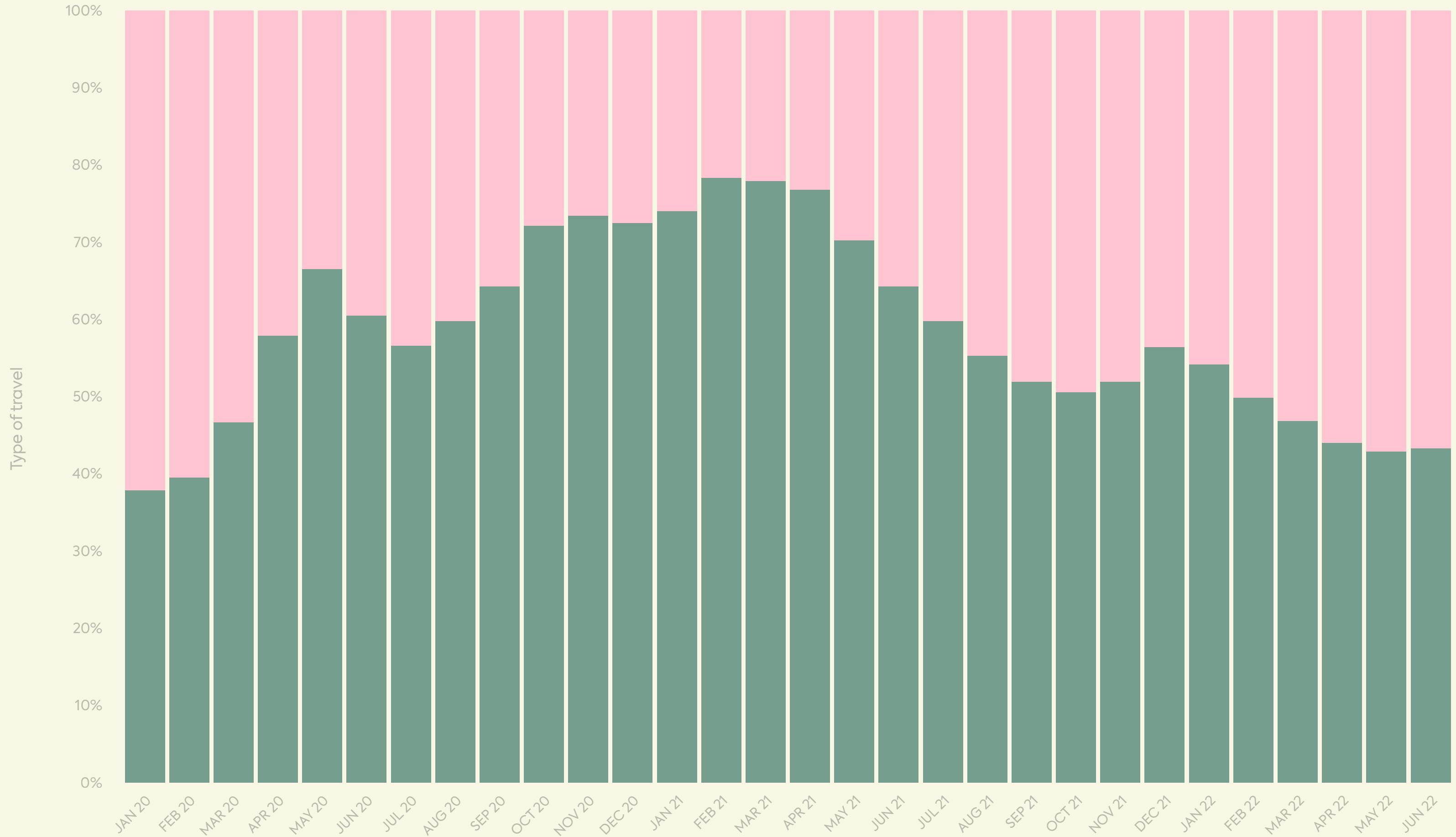
# Domestic travel

2022



## Domestic vs foreign travel

Domestic Foreign



## Headline news

The first few months of 2020 markedly demonstrate the effects of the pandemic on domestic travel. From a steady 2019 figure of around 30%, the first summer of covid took domestic travel to highs of 65% as travel restrictions came into play. Cut to 2022 and although there’s been a steady fall, it looks to have settled at a higher base rate: about 40% of total travel.

## What does this mean?

Although the urge to travel is stronger than ever, many travelers still feel safer remaining within their own borders – particularly with the latest staffing problems faced by airlines. If you haven’t already, it’s still a wise move to refocus your marketing activities to a domestic audience. If you’re running ads, it could be as simple as retargeting them. Alternatively, you could hit your database with a segmented special offer email for domestic stays, whether it’s 5% off or free parking.



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From a steady figure of around 30%, the first summer of covid took **domestic travel to highs of 65%** as travel restrictions came into play.







# Online check-in and kiosk usage

FOR



## Headline news

The acceptance of contact-free guest journeys was already on the rise pre-pandemic, and the last two years have accelerated this trend across all industries. Within hospitality, online check-in and check-out were the big winners. From 2021 to 2022, there was a 20% increase in the amount of online check-ins.

We also know that booking channel has a big impact on whether a guest checks in online. For guests who book directly on the property's website, 40% go on to check-in online. Bookings from other sources only have a 16% rate of doing so.

Another form of self check-in is using onsite kiosks. When it comes to kiosk usage, the last six months of kiosk check-in sessions reveal a very positive trend, with the amount quadrupling from January to June. The number of Mews enterprises using kiosks has risen from 6.1% in January to 9.2% in June.

### Direct bookings

**40%** Guests who use self check-in

**60%** Guests who don't use self check-in

### Other booking sources

**16%** Guests who use self check-in

**84%** Guests who don't use self check-in



# 20% ▲

Increase in the amount of online check-ins from 2021 to 2023



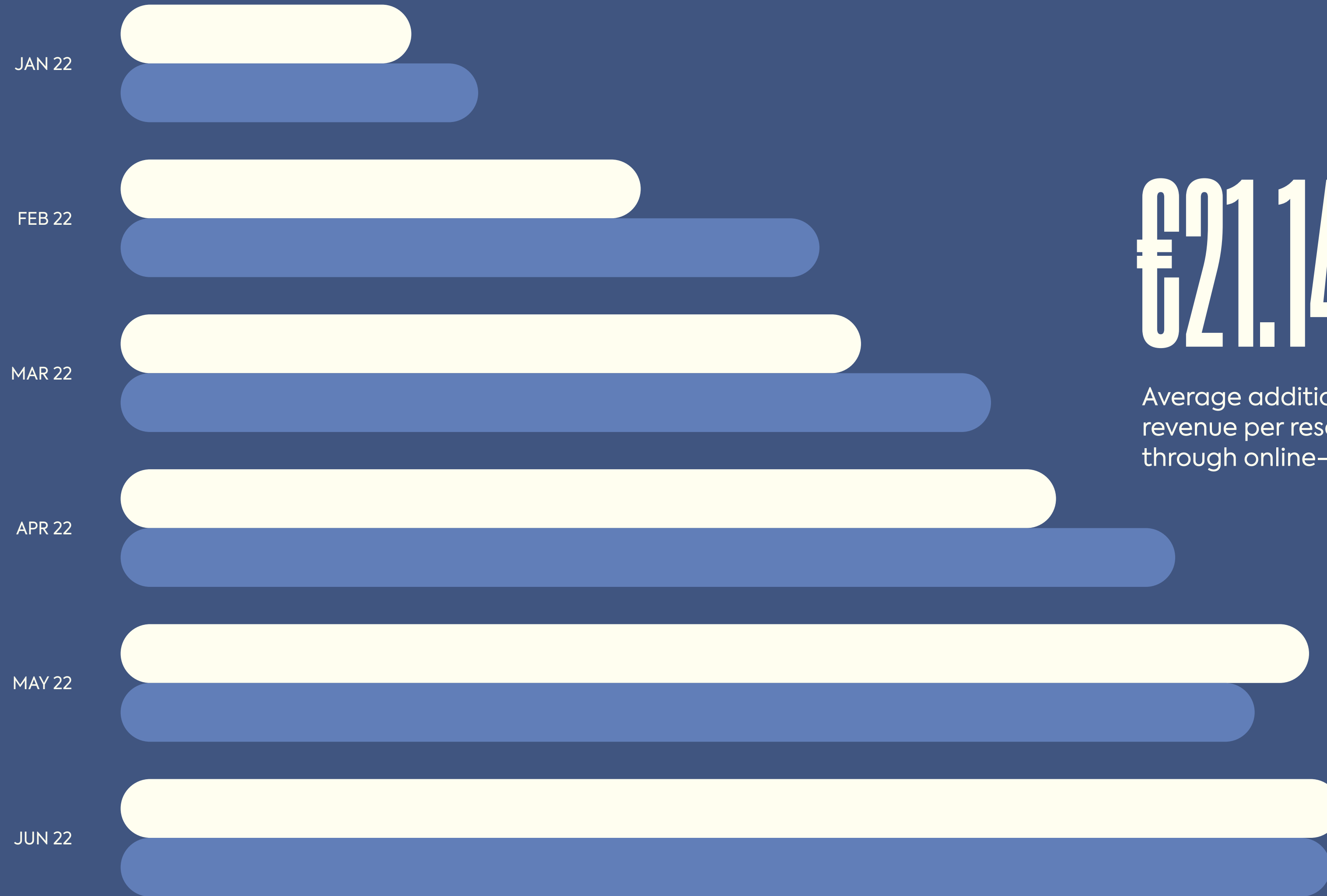


## Kiosk and online check-in rates

Kiosk check-in



Online check-in



# €21.14

Average additional revenue per reservation through online-check-in

## What does it mean?

Many guests are happy to handle small amounts of admin in their own time if it means skipping the queues at reception and heading straight to their room. If you haven't already, enable online check-in for your property; it will not only improve the experience for those who want to use it, it will give your team more time to provide a better experience for those checking in the traditional way. Self-service kiosks are also becoming more popular and are a reliable queue-busting solution.

The fact that over one in three guests who book direct go on to check in online (compared to one in six through other channels) means you should focus more on driving website bookings. These guests will save your team time on arrival, and their high levels of engagement makes them ripe for upselling. In fact, with Mews, you can include upsells as part of online check-in, and since introducing this functionality in March, the average additional revenue per reservation has increased by €21.14.



# Chargebacks





## Headline news

There's no hiding the big news from this chart. The chargeback ratio for apartment rentals is over three times that of hostels or hotels. For reference, [2021's global chargeback-to-transaction ratio was 1.52%](#).

## What does it mean?

First off, it means that chargeback ratios for Mews properties are well below average. With ratios of 0.13% and 0.16% respectively, hotels and hostels see the tangible benefits of Mews' high levels of security. So why are apartments not performing quite so strongly? It could be that there's a lower uptake of security protocols like 3DS. Enabling authentication is a surefire way to bring down that chargeback ratio.

//  
Enabling authentication is a surefire way to bring down that chargeback ratio.

0.13%

**Hotel**  
chargeback ratio

0.16%

**Hostel**  
chargeback ratio

0.49%

**Apartments**  
chargeback ratio



# 1.52%

2021's global  
chargeback-to-  
transaction ratio





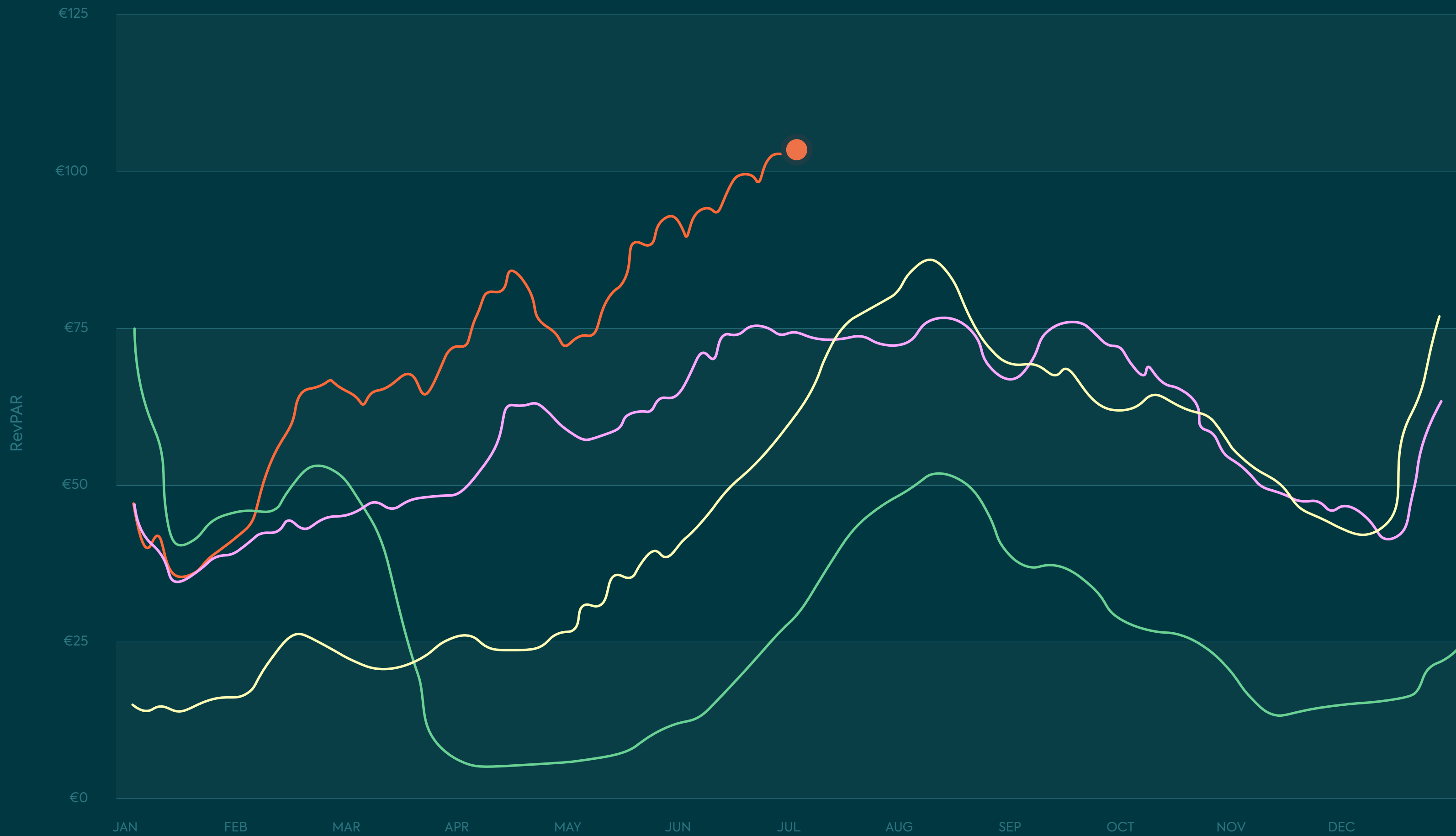
# RevPAR and ADR

# Q5



## RevPAR

2019 — 2020 — 2021 — 2022 —



## Headline news

As you can see in the graphs, 2022 is proving to be a great year for RevPAR and ADR performance. There's a 30% uplift in RevPAR between the first six months of 2022 compared to the same time in 2019, as well as a massive 53% increase in ADR.

Weekdays in 2022 have, on average, 40% higher ADR and a 33% higher RevPAR compared to 2019. For weekends, ADR is 44% higher and RevPAR is 47% higher.

**30%** ▲

Uplift in RevPar between the first six months of 2022 compared to 2019



**40% ADR ▲**

increase on weekdays in 2022  
compared to 2019

**44% ADR ▲**

increase on weekends in 2022  
compared to 2019

MON

TUE

WED

THU

FRI

SAT

SUN

**33% RevPAR ▲**

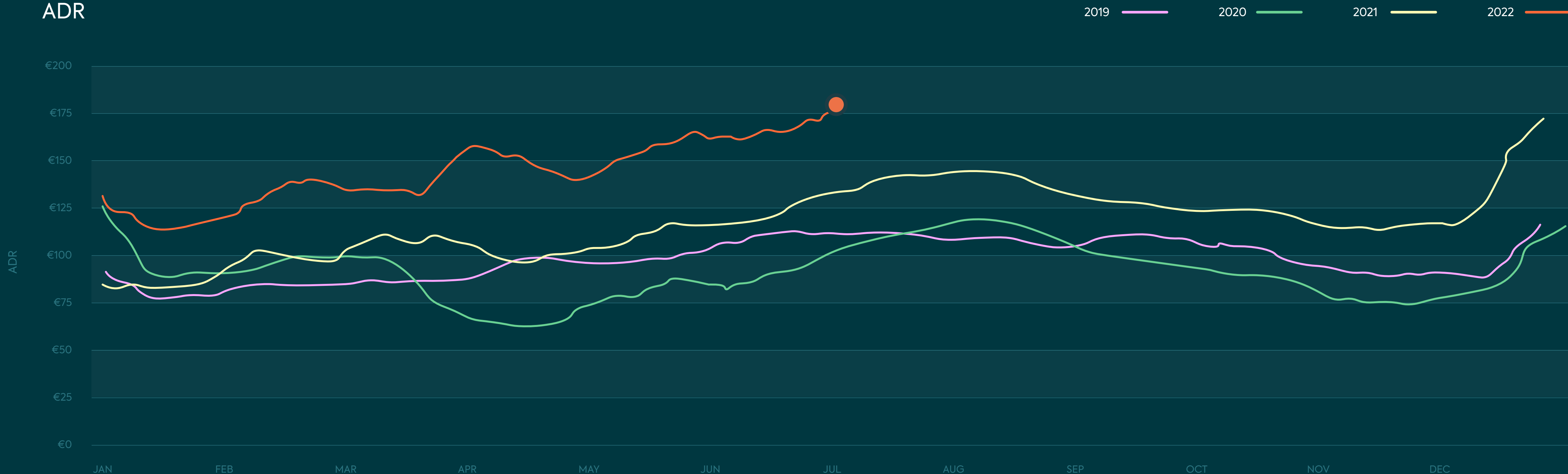
increase on weekdays in 2022  
compared to 2019

**47% RevPAR ▲**

increase on weekends in 2022  
compared to 2019



## ADR



## What does this mean?

While an increase in ADR may feel like good news, it's worth remembering that it's tied to a number of global factors like inflation. So while ADR is higher now, operating costs are higher and occupancy is still a little lower than 2019. Saying that, a 53% bump in ADR should still be noticeable on your bottom line.

A 30% increase in RevPAR is a hugely encouraging figure. In simple terms, it means that properties are generating better revenue for their spaces, suggesting a boost in both

ADR and occupancy (which we know to be true from our other data). And the good news is we expect this positive trend to continue into the rest of the year.

When you compare weekday to weekend performance, the change in ADR has been pretty much consistent. However, RevPAR has risen higher on weekends, which means we're still seeing higher weekend occupancy. That being said, the fact that weekday RevPAR is still 33% higher than in 2019 suggests that business travel has been returning.

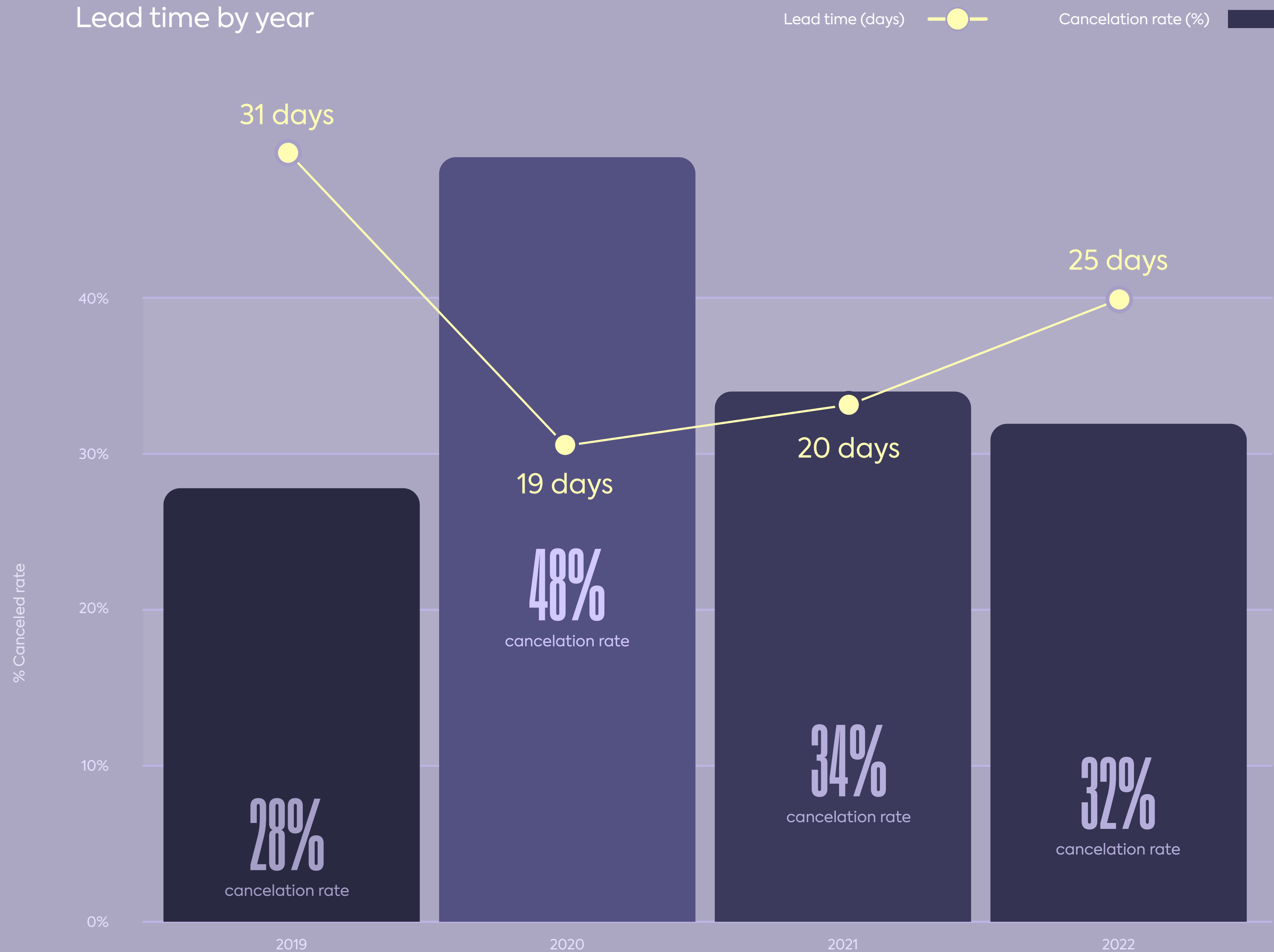


# Booking lead times





## Lead time by year



## Headline news

As you likely remember, cancellation rates in 2020 shot up by 20% as a result of pandemic. Since then, there's been a welcome drop, but levels are still hovering above the 2019 base rate. Lead time for bookings has taken a similar journey. The time between booking and arrival dropped by 39% – 12 days – from 2019 to 2020. Since then, lead times have begun to creep back up to 25 days so far in 2022.

## What does it mean?

Confidence is beginning to return. The reason why cancellation rates remain higher than we'd like is most likely a combination of travel uncertainties with airlines, as well as the lingering reality of covid.

It's a similar story for lead time. During the earlier stages of the pandemic, the constantly changing rules led people to be more late notice with their bookings, something that played havoc with revenue management. Finally, people are starting to look further ahead with their travel plans. This should inform the timing of your marketing campaigns and offers.



# 12 days ▼

The reduction in  
booking lead time  
from 2019 to 2020





# Additional bookable services

# 27



# Headline news

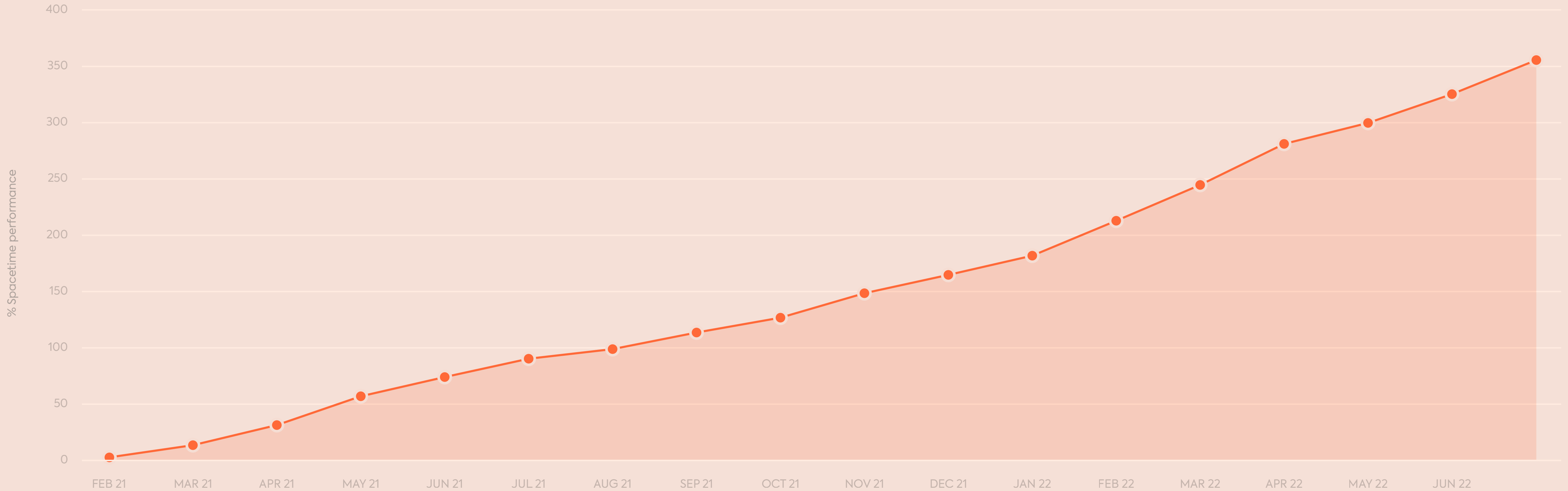
We introduced additional bookable services to Mews at the beginning of 2021. These are services beyond places to sleep that can be booked by guests

and managed in the Mews platform. Examples include desks, parking spaces, meeting rooms, bike rentals and roof terraces.

357

Enterprises using additional bookable services as of 30th June, 2022

## Enterprises using additional bookable services



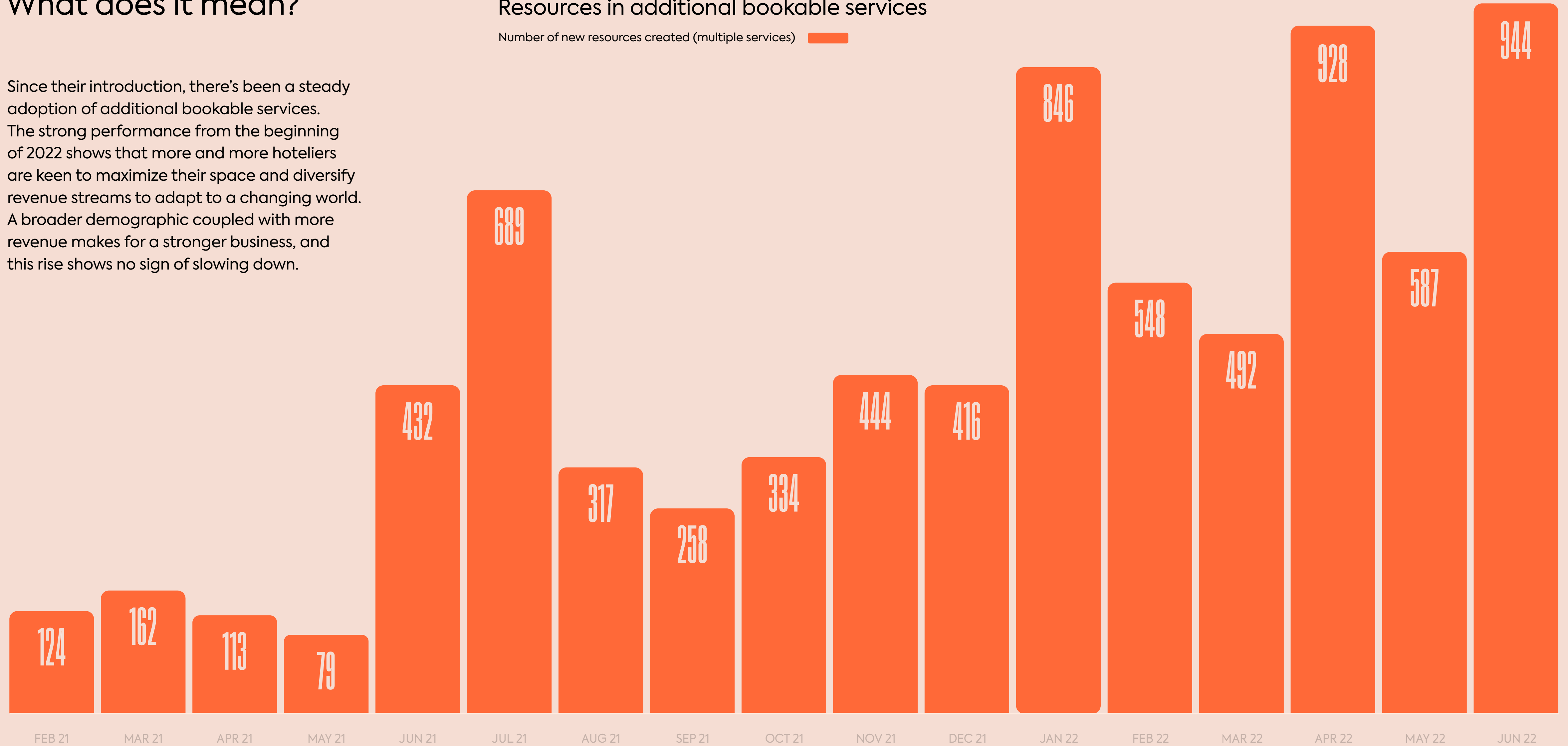


# What does it mean?

Since their introduction, there's been a steady adoption of additional bookable services. The strong performance from the beginning of 2022 shows that more and more hoteliers are keen to maximize their space and diversify revenue streams to adapt to a changing world. A broader demographic coupled with more revenue makes for a stronger business, and this rise shows no sign of slowing down.

## Resources in additional bookable services

Number of new resources created (multiple services)





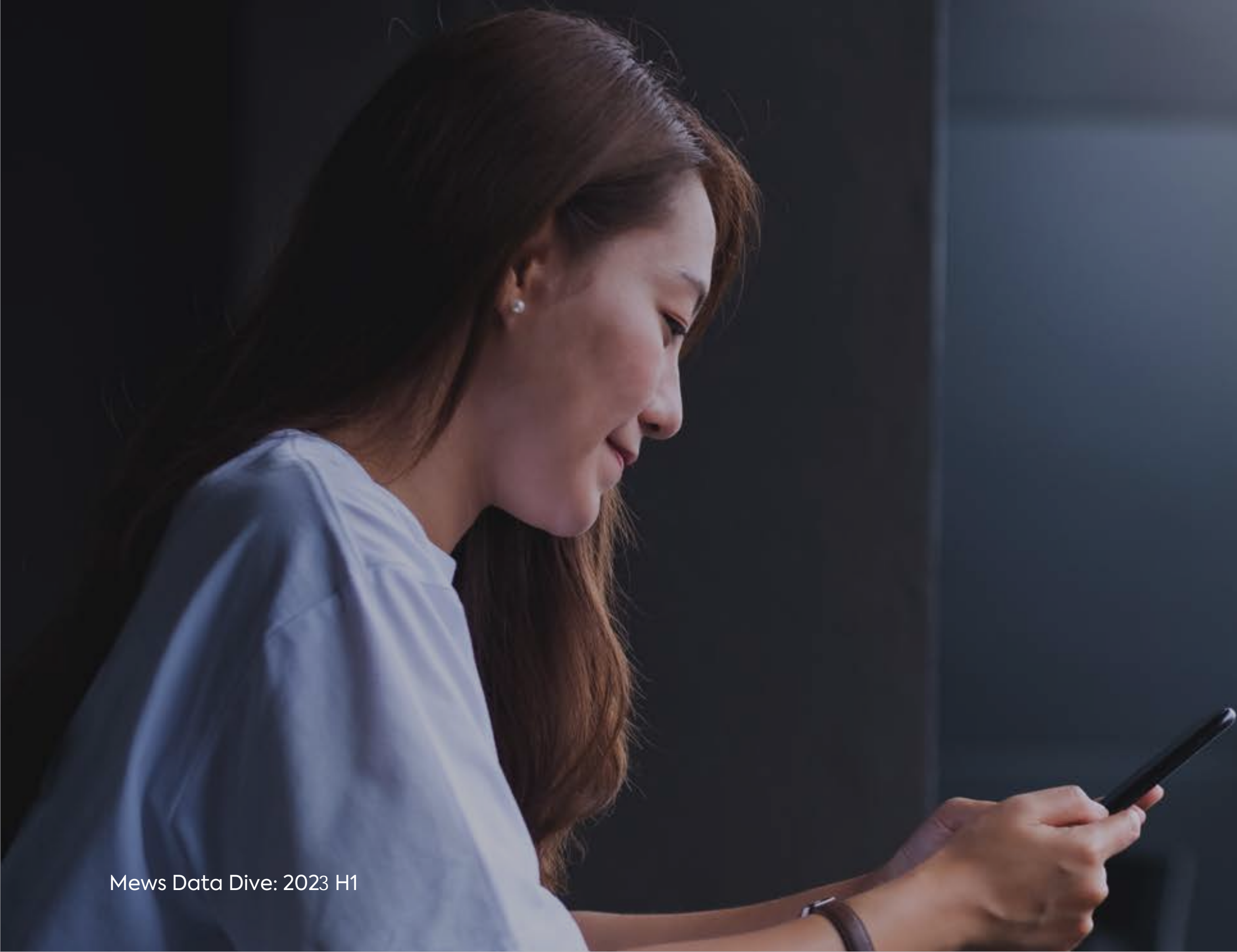
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More and more hoteliers are keen to **maximize their space and diversify** revenue streams to adapt to a changing world.





# Hotel staff



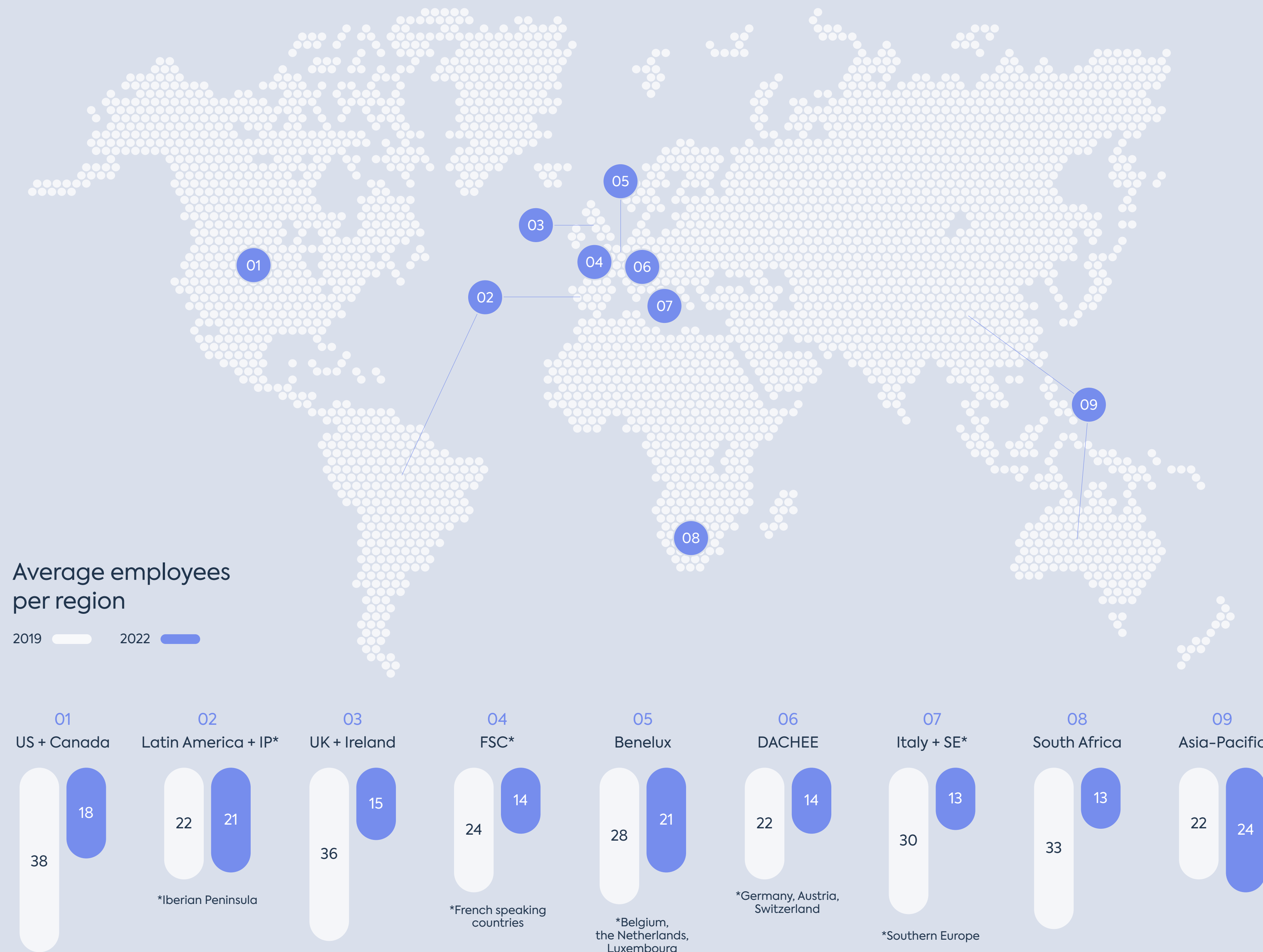
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## Headline news

There's been a significant reduction in the average number of employees per property. In 2019, the average number of employees was 27, while in the first six months of 2022 it is 16. The UK and Ireland saw the biggest fall, dropping from an average of 36 employees to 15. The US and Canada saw a similar drop of 38 to 18, while Benelux and French-speaking countries saw a smaller but still significant headcount reduction. The only exception is in Australia Pacific, where the average staff count has increased by two.

When you look at the data by property type, hostels have seen the most dramatic staff reduction, dropping from an average team size of 33 to 14. Hotel team sizes have reduced by a third, from 26 to 16, with a similar result for apartments.





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Hostels have seen the most **dramatic staff reduction**, dropping from an average team size of 33 to 14.





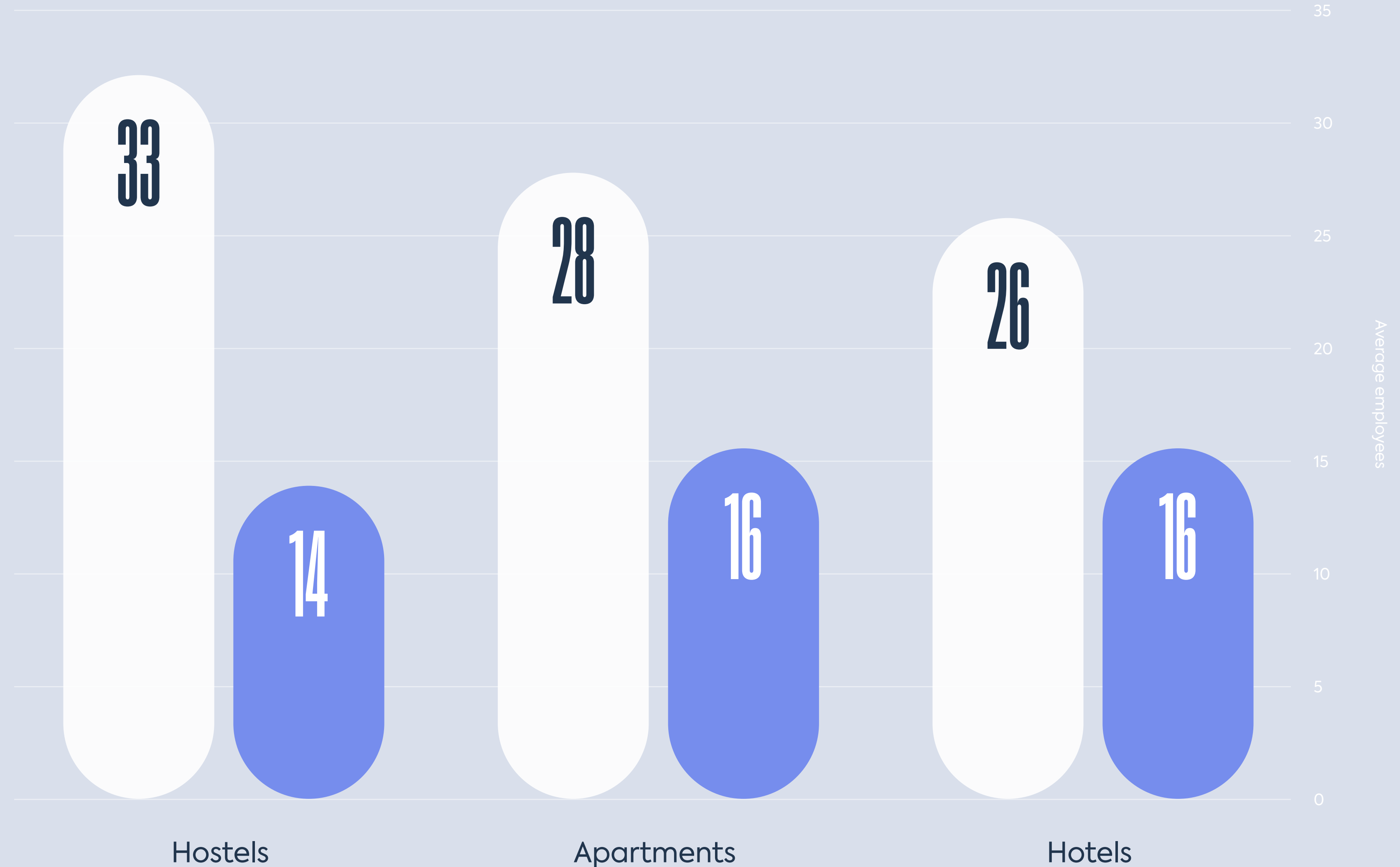
# What does it mean?

A perfect storm of factors has left hospitality businesses around the world struggling to keep and attract talent to their teams. Taken in isolation, this could be seen as a worrisome datapoint. However, when you also consider that RevPAR is up and occupancy rates are more or less on par with 2019, it paints a different picture.

In effect, this data shows us that hotels are able to act just as efficiently – if not more so – even with a reduced team. The key, of course, is choosing the right technology. As luck would have it, we put together a guide on [10 Ways to Manage Staff Shortages](#).

Average employees per enterprise type

2019  2022 





# Rate types





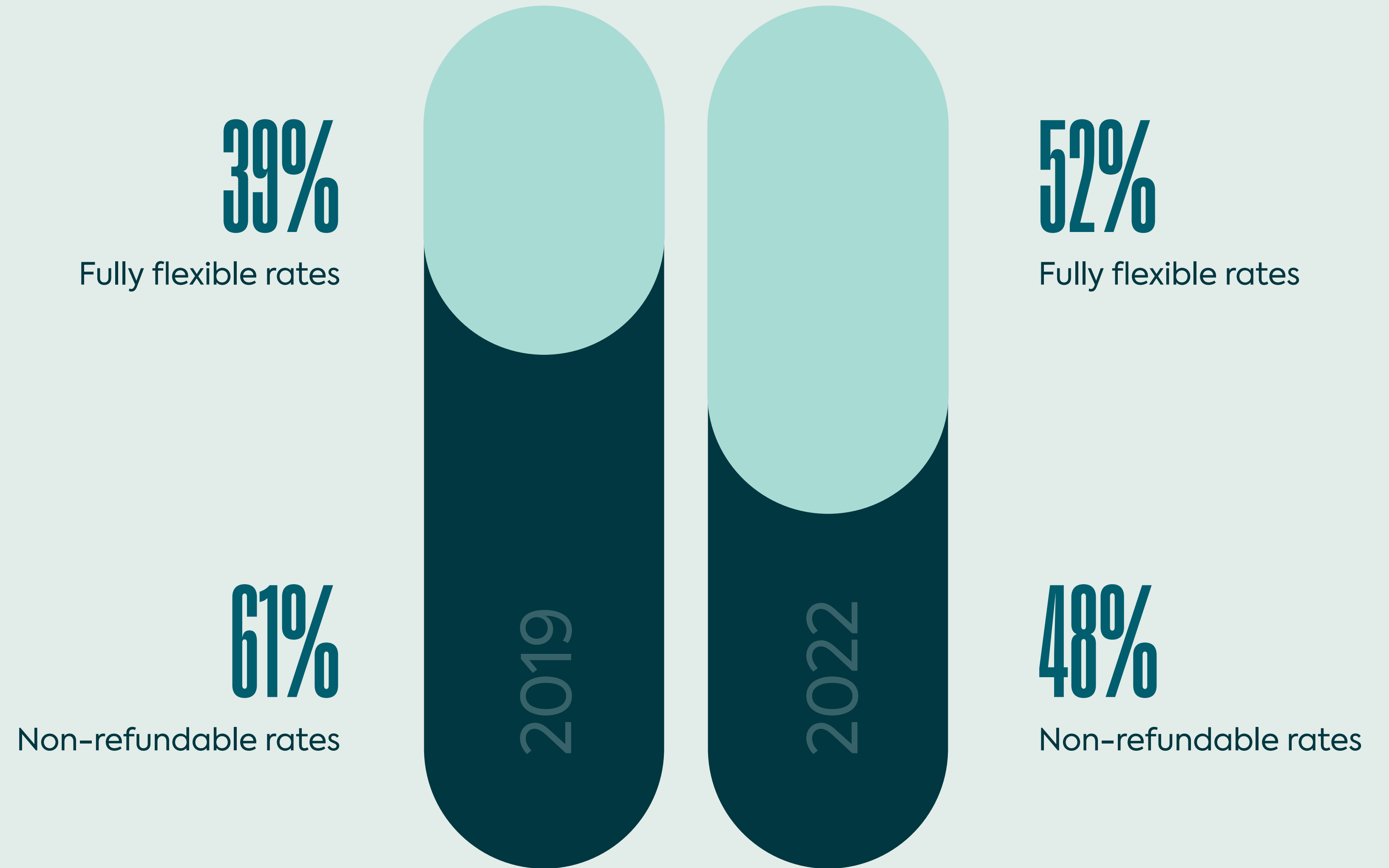
## Headline news

There has been a shift to more flexible bookings since 2019. In 2019, the number of non-refundable reservations was 61%. In the first half of 2022, this number decreased to 48%.

## What does it mean?

Ongoing uncertainty around travel restrictions meant that many travelers were wary of booking accommodation in case they were no longer able to travel. In response, many hoteliers decided to offer more flexible reservations.

However, this shift isn't as dramatic as some predicted. Almost half of all reservations made in the first half of 2022 were non-refundable, demonstrating a willingness and a trust in guests to travel. If your property is offering only flexible bookings and still seeing a high cancellation rate, it's definitely worth bringing back a non-refundable option.





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**Almost half** of all reservations made in the first half of 2022 were non-refundable.





# Integrations

10



## Headline news

Across Mews properties, 2,584 integrations were created during the first six months of 2021. 3,275 integrations were created during the first six months of 2022, an increase of 27%. In other words, hotels are becoming more connected.

## What does it mean?

It's no surprise that distribution is the top integration category. Broadening your property's reach across multiple channels continues to be a necessity while we educate more guests to book direct. It's exciting to see business intelligence tools as second on the list as it shows that more and more hoteliers are actively using their data to make business decisions and streamline operations.

## Top integration categories

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01 Distribution

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02 Business intelligence

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03 Accounting

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04 Revenue management

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05 Point of sale

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## Most installed integrations

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01  SiteMinder

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02  Hotel Search

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03  Booking.com

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04  cubilis

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05  lightspeed

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# 3,275

Integrations created  
within the first six  
months of 2022 across  
Mews properties





## Business Intelligence

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01 Power BI

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02 

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03 OTAIN SIGHT

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## Accounting

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01 Sage

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02 =exact

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03 

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## Revenue Management

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01  pace revenue

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02 

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03 ATOMIZE

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## Facility Management

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01 

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02 

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03 

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04 

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## Customer Management

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01 

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02 

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03 

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## Distribution

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01 

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02 

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03 

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04 

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# Summing up

There you have it. Were there any surprises? How did your property perform against current trends?

The thing about data is that it's a constant flow. That's why the Mews Data Dive isn't a one off. This is the first in a regular series that will assess the state of our industry every few months.

To make sure you don't miss the next installment, sign up to the Mews mailing list.

[Subscribe](#)



# About Mews

Mews has been transforming hospitality since 2012. What began in a single hotel in Prague now powers thousands of hotels around the world, as we pursue our mission to develop transformational solutions for brands and create remarkable experiences for guests.

Since the beginning we embraced being different. We're not simply a property management system, but a connected hospitality cloud with products across the hotel ecosystem and more integrations than anyone else.

From global hospitality brands to independent properties, hoteliers join Mews because they recognize the power of innovation. Properties like yours can benefit from hotel tech that drives efficiency, maximizes revenue, and improves guest happiness. Are you ready to discover your future?

Head to [mewstrade.com](https://mewstrade.com) and fill in the short form. One of our sales specialists will get back to you and arrange a time to show you around Mews Hospitality Cloud in more detail.

**We can't wait to hear from you.**





A young woman with long dark hair, wearing a black turtleneck sweater and blue jeans, is smiling and looking towards a young man. The man is wearing glasses, a black jacket over a maroon sweater, and is also smiling. They are sitting on a ledge in front of a light-colored building with a window and a door. The word "MEWS" is overlaid in large white letters across the center of the image.

# MEWS

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