



Horwath HTL

Hotel, Tourism and Leisure

2022 日本ホテル業界調査 Japan Hotel Industry Survey of Operations

2021会計年度

2021 Calendar Year



Hotel / Tourism / Leisure

The Global Leader in Hospitality Consulting

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Foreword by Horwath HTL Asia Pacific

各位

2022 年 9 月

この度はお忙しい中、「日本ホテル業界調査（Japan Hotel Industry, Survey of Operations FY2021）」にご協力を賜りまして誠にありがとうございました。

お陰様で本年度は参加いただいた国内 88 ホテル（フルサービス 73 ホテル及び宿泊主体型 15 ホテル）のご協力により調査分析を実施することができました。この度、本年度調査結果（2021 会計年度データ）がまとまりましたのでご送付申し上げます。皆様の予算、運営の比較、開発・改装計画等の際のベンチマークとしてお役に立てれば幸いです。

本レポートに関しご質問等がございましたら、お気軽にお問合せください。皆様からご提供いただいたデータの機密性に関しては最大限の注意をもって取り扱わせていただきます。今後とも継続して当社調査へのご協力を賜りますよう、宜しくお願い申し上げます。

ホーワス HTL, ジャパン
マネージング・ディレクター
高林 浩司

Dear Hotelier

September 2022

Thank you very much for participating in our annual hotel industry survey (Japan Hotel Industry, Survey of Operations FY2021). We appreciate your cooperation.

This year, we received feedback from 88 hotels (73 Full-Service and 15 Limited-Service hotels) nationwide. We are happy to announce the completion of the survey results. We hope you utilize this as benchmarks for your budgeting, operational comparisons, and/or development/refurbishment planning.
















Should you have any questions or comments regarding this hotel industry survey, please feel free to contact us. We conduct this hotel industry survey annually and we believe that our survey results will be a help as a benchmarking material for hotel owners, operators, developers, and other related parties.

Koji Takabayashi
Managing Director
Horwath HTL, Japan

Annual Study Honorary Advisory Board

(in alphabetical order)

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用語解説および本調査の前提事項

用語	開設
客室売上	客室を1日未満、終日、もしくはそれ以上の期間に渡り賃貸することから得られる収入をいう。また、この金額には客室収入として保持或いは経費(すなわち人件費)相殺のために使用されるサービス料を含むが、税金やスタッフに渡されるチップは含まれない。
料理売上	レストラン、ルームサービス、ミニバー、バンケット、ケータリングにおける料理販売収入及びソフトドリンク販売収入を指す。この収入には料理収入として保持或いは経費(すなわち人件費)相殺のために使用されるサービス料を含むが、税金やスタッフに渡されるチップは含まれない。
飲料売上	酒類の売上より生み出される飲料収入を指す。この収入には飲料収入として保持される或いは経費(すなわち人件費)相殺のために使用されるサービス料を含むが、税金やスタッフに渡されるチップは含まれない。
その他営業部門売上	ランドリー、ジム・フィットネス、スイミングプール、バレーサービスなど、部門として特に記載のない営業部門から生み出される収入を指す。
雑収入	第三者の運営に関連する収入或いはホテルから直接運営経費が発生しない収入を指し、為替差損益、店舗スペースやショーケースのリース収入やキャンセル料収入、現金割引収入などが含まれる。
料理原価	客に提供される食材及びソフトドリンクの原価や仕入れに伴う運送料などを含んだ食材の総請求金額(値引きがある場合は値引き後)を指す。従業員用の食事費用などは別部門に計上されるため、ここで計上される料理原価には含まない。
飲料原価	客に提供される酒類の原価、カクテルなど混合飲料を作るために使用される飲料の原価、関税や配送料などを含むが、値引き額は減額された総請求金額を指す。従業員用飲料の原価は別部門に計上されるため、ここでの費用には含まない。
その他営業部門原価	ランドリー、ヘルスセンター、スイミングプール、バレーサービスおよび特に部門として記載のないその他営業部門に関わる原価を指す。
Payroll & Related Expenses	ホテル従業員に対し支払われる給与、賃金、ボーナスおよびその他関連費用を指す。ここには社会保険、医療手当、有給休暇、福利厚生費、従業員の食事補助や従業員割引に対する負担金額などが含まれる。
客室その他費用	客室部門の費用において、人件費以外の費用を指し、ケーブルTV受信料、清掃用具、旅行代理店手数料、無料サービスやギフト、客用消耗品、リネン費用、印刷物および事務用品、客室への備品貸出、ロイヤルティーフィー、本社費用などを含む。
料飲その他費用	料飲部門の費用において、人件費以外の費用を指し、陶器やガラス類、清掃用具、装飾品、客用消耗品、ランドリー、リネン、音楽およびエンターテイメント、メニュー、シルバーやユニフォームなどを含む。
その他営業部門その他費用	その他営業部門の費用において、人件費以外の費用を指し、ランドリー、ヘルスセンターやスイミングプールでの提供備品などを含む。

<p>非配賦費用</p>	<p>非配賦費用は(1)一般管理部門費用、(2)セールス&マーケティング費用、(3)情報通信システム費用、(4)水道光熱費、(5)修繕維持管理部門費用が含まれる。これらの費用はそれぞれが1つ1つの個別部門としても取り扱われる。(1)~(5)の費用項目の内容は以下の通りである。</p> <ul style="list-style-type: none"> • 一般管理部門費用には現金過不足、クレジットカード手数料、回収費用、役員関連の経費、一般保険料、郵便料金、弁護士費用、諸会費、旅費、会計士費用やコンサルティング料が含まれる。 • マーケティング部門費用は広告、営業、販売促進、マーチャンダイジング、広報および調査、マーケティングに関連する旅費・交際費および消耗品を含む。 • 情報通信システム費用には、電話代、インターネットサービス料金、サービス費用として計上されるホスティングストレージ費用、テクニカルサポート費用、ソフトウェアライセンス及びメンテナンス費用が含まれる。 • 水道光熱費は電気代、ガス代、燃料代、スチーム代、水道代が含まれる。 • 修繕・維持管理部門費用は建物、電気機器や据付品、カーペット、家具、植栽等の補修費用や電球交換、機器関連の消耗品費用、廃棄物処理費用などを含む。
<p>本調査における3水準の利益</p>	<ul style="list-style-type: none"> • 第1水準：部門利益・損失 • 第2水準：GOP（マネジメントフィー・固定費前利益。部門利益・損失から非配賦費用を減じたもの。） • 第3水準：EBITDA（利払い、税金、減価償却前の収益。GOPからマネジメントフィーおよびその他固定費用を減じたもの。）

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. The figures include service charges that are retained as room revenue or used to offset expenses (namely payroll), excluding hotel accommodation tax and tips given to employees.
Food Revenue	Revenue derived from the sale of food and non-alcoholic beverages in restaurants, in-room dining, mini bar, banquets and/or catering. This includes service charges that are retained as revenue or used to offset expenses (namely payroll), but excludes tax and tips given to employees.
Beverage Revenue	Revenue derived from the sale of alcoholic beverages. This includes service charges that are retained as revenue or used to offset expenses (namely payroll), but excludes tax and tips given to employees.
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, cancellation 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.

<p>Other Operated Departments Other Expenses</p>	<p>Represents non-payroll expenses for all other operated departments, including laundry supplies, health centre and swimming pool supplies, etc.</p>
<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).

ホーワス HTL –アジア・パシフィックについて

ホーワス HTL- アジア・パシフィック (HHTL)はクロウ・グローバル (Crowne Global) のホテル・旅行・観光に特化したコンサルティンググループのアジア太平洋地域部門です。1987年の創立以来、HHTL はアジア太平洋地域において個人事業家、世界の著名ホテルチェーン、デベロッパー、金融機関、投資家、各種企業等、お客様のプロジェクトのさまざまな段階において2,000以上のプロジェクトに携わって参りました。当社はアジア太平洋地域にて活動しており、シンガポール、香港、北京、上海、ジャカルタ、クアラルンプール、シドニー、ムンバイ、東京、オークランド、バンコクを含む主要都市にてオフィスを展開しております。

アジア太平洋地域の主要都市における当社オフィス間で協力しながら、国際的視野を持った多種多様なスキルをご提供し、業界における幅広い人脈を使い、お客様のお役にたてることを保証いたします。また、世界で最も幅広く、包括的である HHTL のホテル・旅行・観光関連のデータベースも我々の業務における強力なサポートとなっています。当社がプロジェクトのさまざまな段階においてご提供している業務内容は大きく3種類に分類されます。

開発計画支援： 戦略立案；市場参入戦略；市場調査；国・地方自治体の観光政策分析；観光関連プロジェクトのマスタープラン策定；サイト分析；土地の最有効活用；ホテルのコンセプト立案化；施設構成のアドバイス；事業化調査；資産価値評価；ホテル運営会社選定；運営委託契約交渉

アセット・マネジメント業務： オーナー代行業務；アカウントビリティレビュー；運営レビュー；ベンチマーキング；ベストプラクティス分析；資本支出の費用対効果分析；リポジショニング戦略および分析；固定資産税の見直し；法廷審理サポート

トランザクション / 融資関連サービス： 投資・売却戦略；入札プロセス支援；融資事前調査；価値評価・鑑定評価；売手側デューディリジェンス；買手側デューディリジェンス；債務超過・破産管財業務関連；融資条件改定

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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:

Planning & Development Services

- Strategic Planning
- Market Entry Strategy
- Market Research
- Macro Tourism Analysis
- Tourism, Project and Destination Master-planning
- Site Analysis
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- Product Conceptualization
- Facilities Recommendation
- Market and Financial Feasibility
- Residual Land Valuation
- Hotel Management Company Selection
- Management Contract Negotiation

Asset Management Services

- Owner Representation
- Accountability Review
- Operational Review
- Benchmarking
- Best Practice Analysis
- Capital Expenditure Cost/Benefit Analysis
- Reposition Strategy and Analysis
- Property Tax Appeals
- Litigation Support

Transaction/Lender Services

- Investment/Divestment Strategy
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- Pre-lending Review
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