



**2020**Mar

**Survei Sentimen Pasar Hotel & Restoran di Indonesia  
Terhadap Pengaruh Wabah COVID-19**

*Indonesia Hotel & Restaurant Market Sentiment Survey  
on the Influence of  
the COVID-19 Outbreak*



**Horwath HTL**

CELEBRATING 22 YEARS IN INDONESIA 

# Kata Pengantar

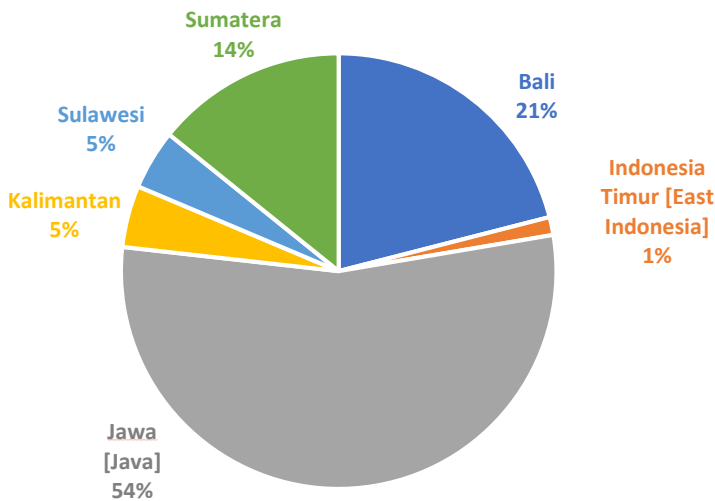
## Introduction

Survei Sentimen Pasar Hotel & Restoran di Indonesia dirancang untuk industri hotel & restoran di Indonesia dengan memberikan penilaian cepat mengenai prediksi pasar di masa yang akan datang. Survei ini diselenggarakan oleh Perhimpunan Hotel & Restoran Indonesia (PHRI) bekerjasama dengan Horwath HTL dalam rangka menilai dampak pengaruh wabah COVID-19 yang sedang dihadapi terhadap pasar.

*Indonesia Hotel & Restaurant Market Sentiment Survey designed to provide the Indonesian hotel & restaurant industry with a quick assessment of the future market prediction. This survey is conducted by PHRI (Indonesian Hotel & Restaurant Association) with Horwath HTL regarding the influence of the COVID-19 outbreak that we are facing in order to assess its impact on the market.*

### Persentase Responden – Berdasarkan Pulau

#### Percentage of Respondents – By Island

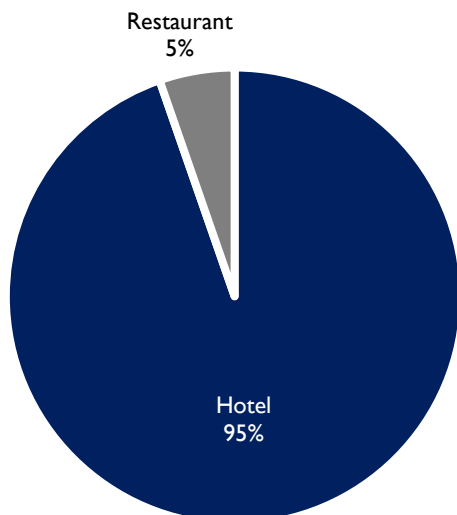


Survei ini mencakup **676** hotel dan restoran dari 28 provinsi dan kota.

*This survey covers **676** hotels and restaurants from 28 provinces and municipalities.*

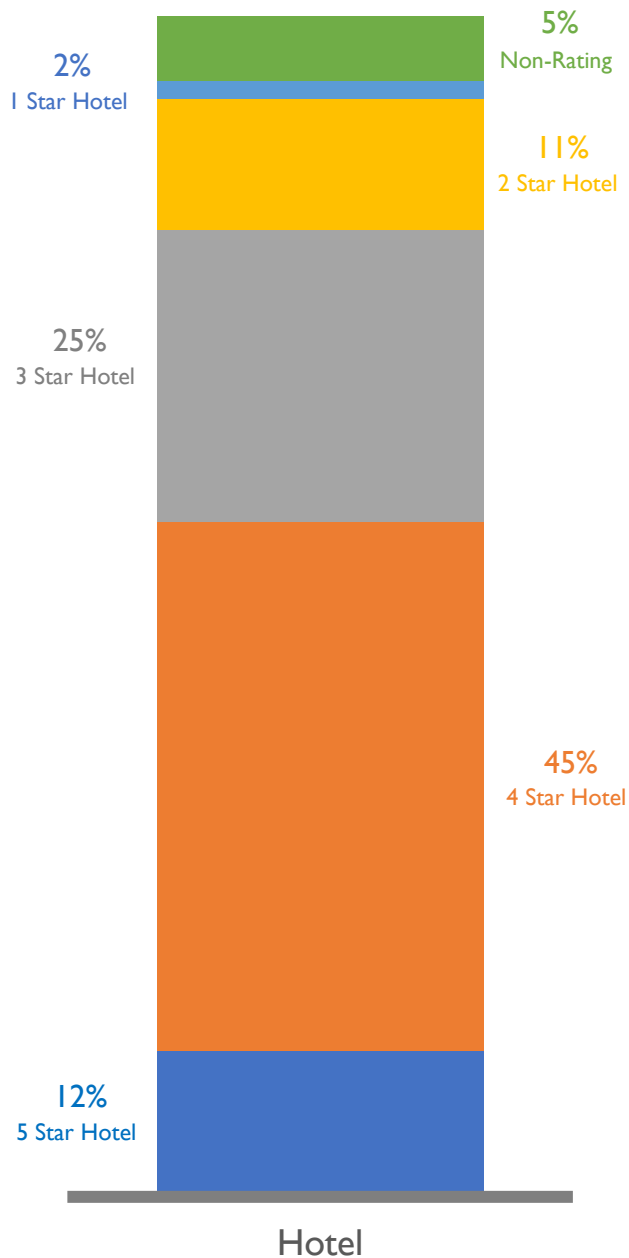
### Persentase Responden – Berdasarkan Tipe Unit Bisnis

#### Percentage of Respondents – By Type of Business



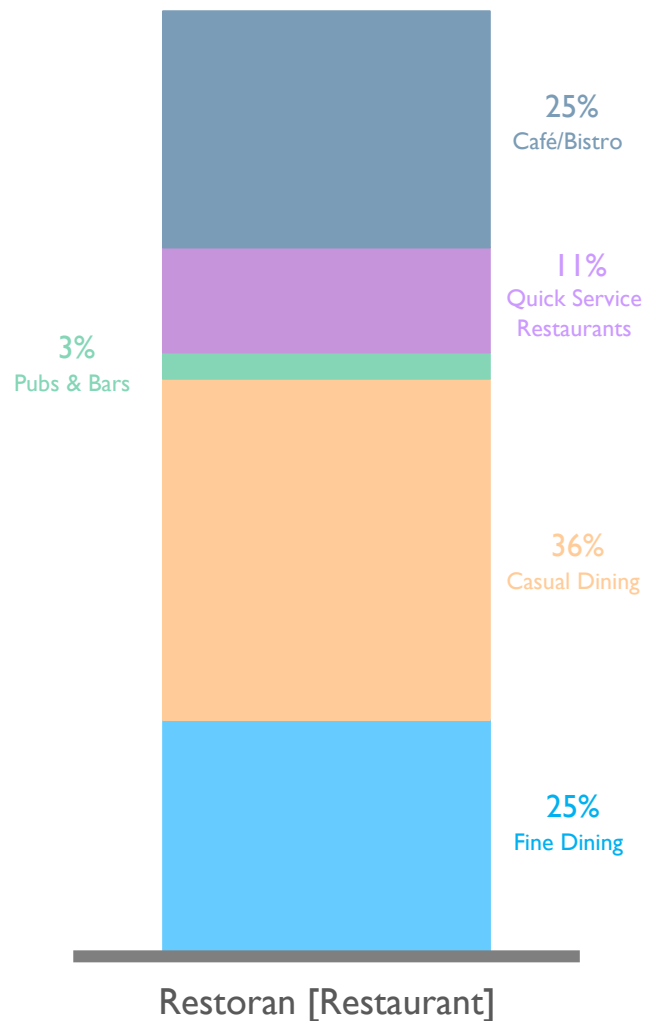
## Persentase Responden – Berdasarkan Klasifikasi Hotel dan Tipe Restoran

### Percentage of Respondents – By Hotel Classification and Type of Restaurant



Responden terbesar adalah hotel bintang 4 dengan memberikan hampir setengah dari seluruh total tanggapan. Hotel bintang 3 memberikan seperempat tanggapan dan hotel bintang 2 dan bintang 5 memperoleh masing-masing kurang lebih 10%. Sedangkan untuk restoran, responden terbesar adalah *Casual Dining* diikuti oleh *Fine Dining* dan *Café/Bistro* masing-masing sebesar 25% responden

*The largest capture of hotels were 4 Star, delivering nearly half of the responses followed by 3-star with a quarter and 2 / 5-star hotels at just over 10% each. Meanwhile, the largest capture for restaurants are casual dining, followed by fine dining and café/bistro.*



## Pertanyaan I: Berdasarkan situasi saat ini, menurut Anda berapa lama pengaruh wabah COVID-19 kepada kinerja pasar hotel akan berlangsung?

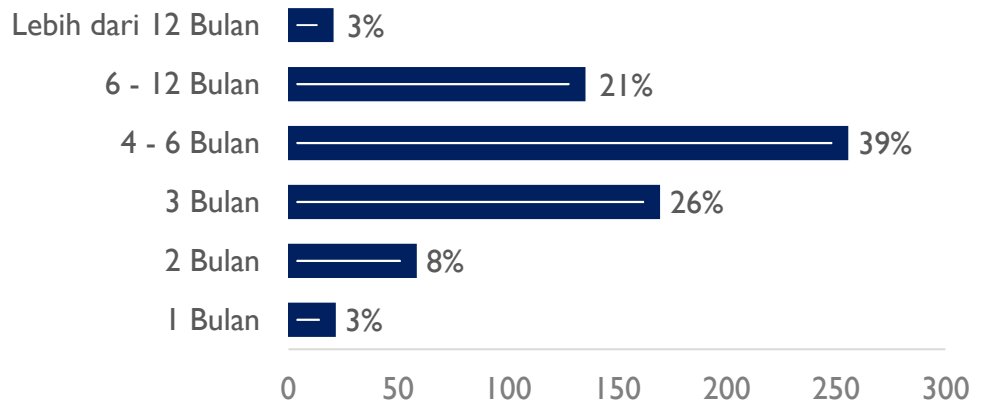
*Questions I: Based on the current situation, for how long do you assess the influence of the COVID-19 outbreak on the hotel's operating performance will continue?*

Secara keseluruhan, lebih dari 90% hotelier yakin bahwa dampak dari pengaruh wabah COVID-19 ini tidak akan berlangsung lebih dari 6 bulan. Sebagai perbandingan, saat kasus pertama SARS terkonfirmasi di Bulan Desember 2002 dan wabah mulai berlangsung pada saat April 2003. Di bulan Juli 2003, kemudian virus dapat teratasi, dan secara keseluruhan durasi berlangsung sekitar 8 bulan. Kasus COVID-19 pertama kali muncul di Desember 2019 dan wabah mulai merebak di akhir Januari 2020. Berdasarkan prediksi yang diberikan oleh mayoritas responden, pengaruh COVID-19 akan berlangsung sekitar 4-6 bulan. Oleh karena itu, dapat diperkirakan bahwa dampak tersebut akan berlangsung hingga antara bulan Mei sampai Agustus, yang tentunya akan menyebabkan tekanan besar terhadap kinerja operasional hotel untuk semester awal tahun 2020.

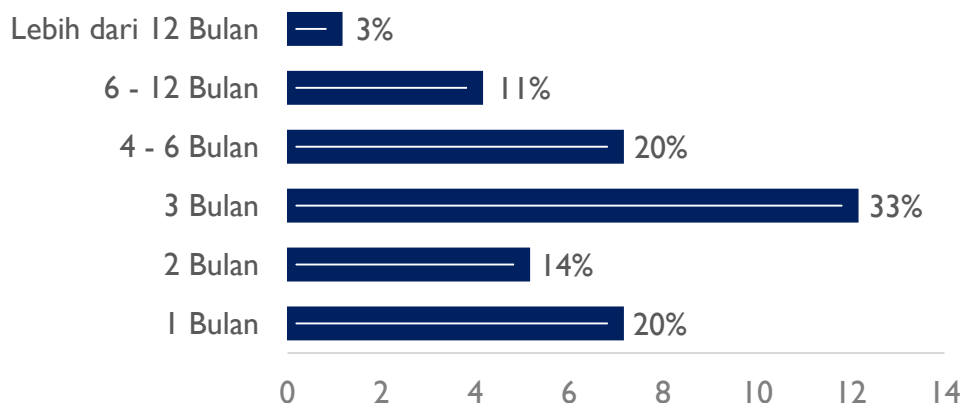
*Overall, more than 90% of hoteliers believe that this impact will not last longer than 6 months.*

*As a comparison, the first SARS confirmed case was in December 2002 and the outbreak was in April 2003. In July 2003, the virus was controlled, and the overall duration was about eight months. The COVID-19 first appeared in December 2019 and the outbreak appeared in late January 2020. Based on the prediction submitted by the majority, the impact of COVID-19 will last 4-6 months. Therefore, it is assumed that the impact will last until sometime in May to August, leading to great pressure on hotels' operating performances for the first half of 2020.*

### HOTEL

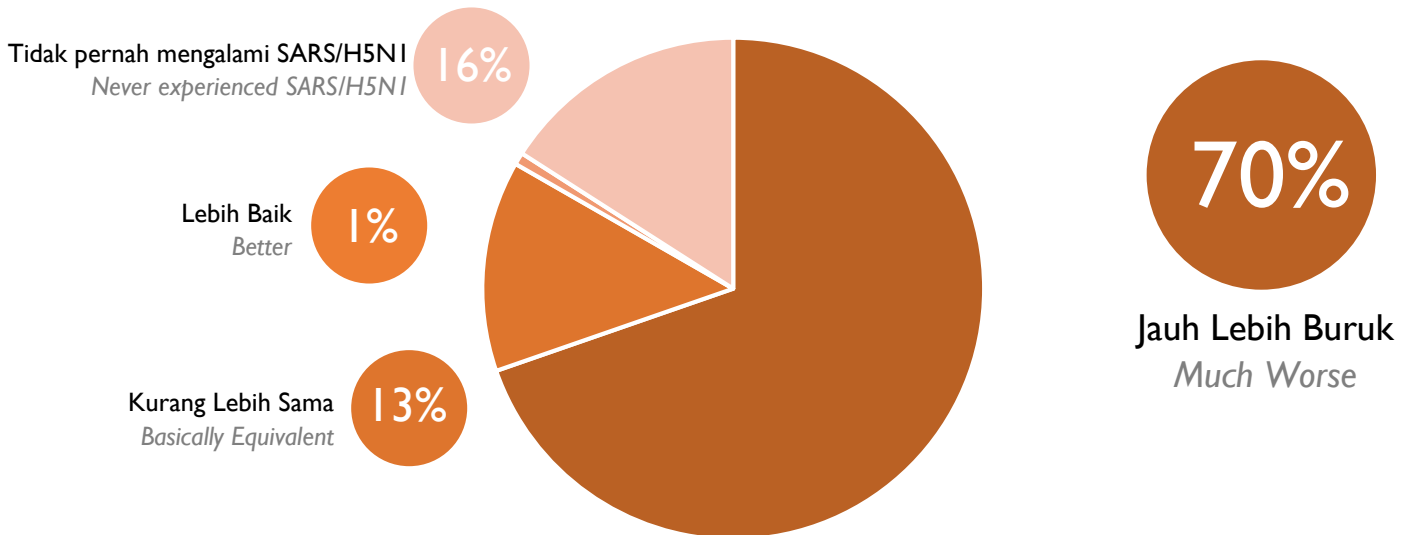


### RESTORAN RESTAURANT



**Pertanyaan 2: Bagaimana Anda menilai pengaruh wabah COVID-19 terhadap kinerja pasar hotel dan restoran, dibandingkan dengan wabah penyakit serupa, seperti SARS 2003, H5NI 2016?**

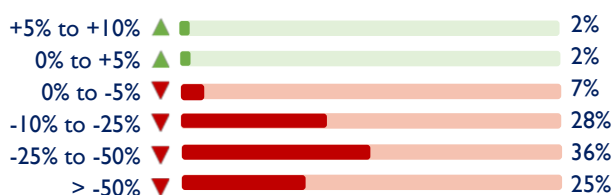
*Questions 2: Based on the How do you assess the influence of the COVID-19 outbreak on the hotel and restaurant market performance, compared to other similar health scares e.g. SARS 2003, H5NI 2016?*



**Pertanyaan 3: Dengan mempertimbangkan pengaruh wabah COVID-19, apa harapan Anda untuk pertumbuhan/penurunan di tengah tahun pertama 2020 (HI-2020) vs tengah tahun pertama 2019 (HI-2019)?**

*Question 3: Considering the influence of the COVID-19 outbreak, what is your expectation for growth/decline in the first half of 2020 (HI-2020) vs the first half of 2019 (HI-2019)?*

**HOTEL | Tingkat Hunian Kamar**  
*Occupancy*



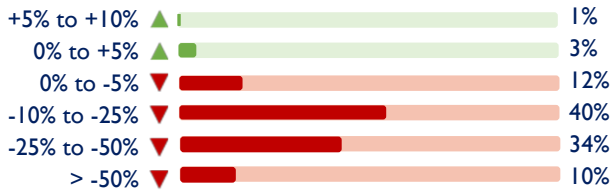
Mayoritas hotel berpendapat bahwa kinerja tingkat hunian kamar akan mengalami penurunan sekitar 25-50% pada semester awal 2020 dibandingkan semester awal 2019. Ada sekitar 25% responden berpendapat bahwa penurunan semester awal 2020 ini akan mencapai lebih dari 50% dibandingkan dengan semester awal 2019.

*The majority of hotels thought that their occupancy performance would be down between 25 – 50% in HI YOY. A very large 25% of respondents thought the fall would be greater than 50% YOY.*



## HOTEL | Rata-rata Harga Kamar Average Room Rate

**-10% to -25%**

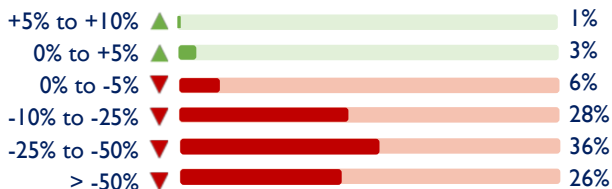


Untuk Rata-rata Harga Kamar, mayoritas hotel berpendapat bahwa kinerja ini akan mengalami penurunan sekitar 10-25% di semester awal 2020 dibandingkan semester awal 2019 lalu. Hal ini memperjelas bahwa hotel lebih mengalami tekanan dari sisi kinerja tingkat hunian kamar dibanding rata-rata harga kamar, dimana dalam hal ini disarankan untuk tidak menurunkan harga kamar karena tidak akan berpengaruh untuk menstimulasi tambahan jumlah kamar yang terjual pada sementara waktu ini.

*The majority of hotels thought that their average room rate performance would be down between 10 – 25% in H1 YOY. It is clear that hotels are feeling more pressure on occ than rate which is encouraging as a reduction in rates is unlikely to stimulate additional RND for the time being.*

## HOTEL | Total Pendapatan Total Revenue

**-25% to -50%**

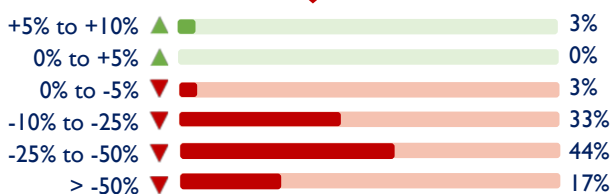


Hal yang menarik terlihat dari tanggapan responden bahwa untuk kinerja total pendapatan diperkirakan penurunannya sama dengan kinerja tingkat hunian kamar, hampir sebagian besar responden berpendapat bahwa kinerja total pendapatan hotel akan mengalami penurunan sebesar 25-50% pada semester awal 2020 dibandingkan dengan semester awal 2019 lalu. Turunnya pendapatan dari sisi F&B hampir dirasakan pula oleh hotel di seluruh Indonesia.

*Interestingly the responses for total revenue were very similar to occupancy, with a larger volume of respondents predicting a fall of between 25 – 50% in revenue in H1 2020 YOY. A reduction in F&B revenue is being keenly felt at hotels across the country.*

## RESTORAN | Total Omset Penjualan Restaurant | Total F&B Revenue

**-25% to -50%**



Sebagian besar restoran merasa bahwa omset penjualan akan turun antara 25-50% di semester awal 2020 dibandingkan dengan tahun lalu. Beberapa diantara responden tersebut dan juga dari hotel berpendapat bahwa penurunan akan lebih besar dari 50% YOY dan sebagian besar lainnya berpikir penurunan akan ada di antara 10-25%.

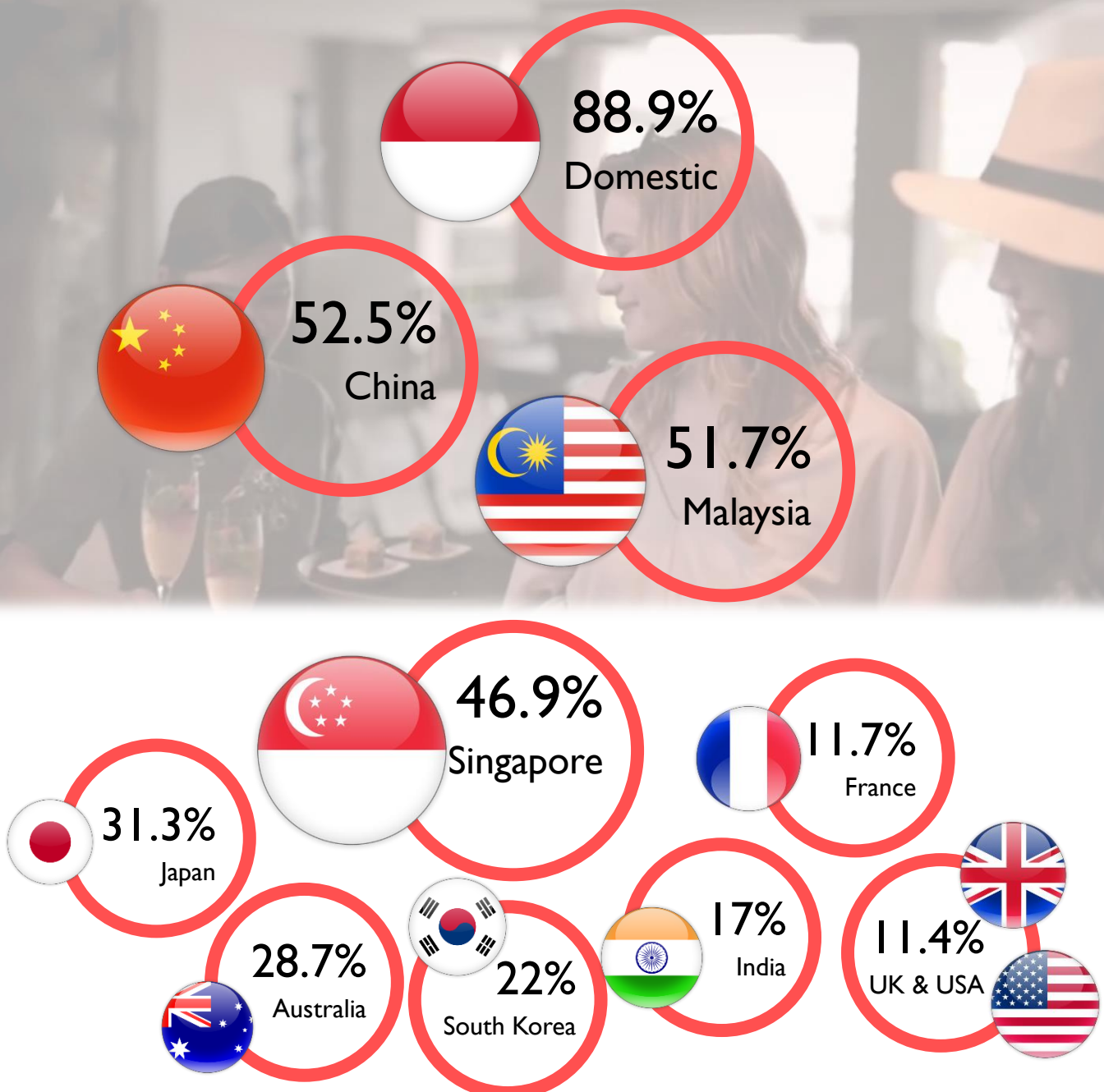
*A larger proportion of restaurants believe that their revenues are going to fall between 25 – 50% in H1 YOY. A fewer number of respondents vs hotels thought the fall would be greater than 50% YOY & a greater number thought the decline would be between 10 – 25%.*

## TOP 10 Sumber Market HOTEL from 640 responden

### TOP 10 Source of Market - HOTEL from 640 respondents

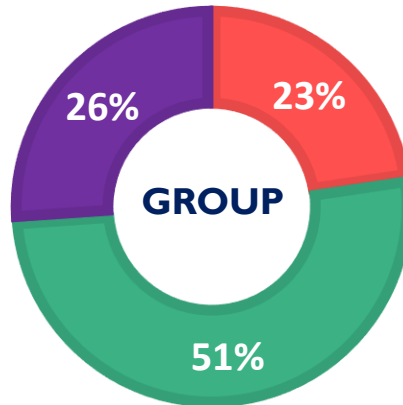
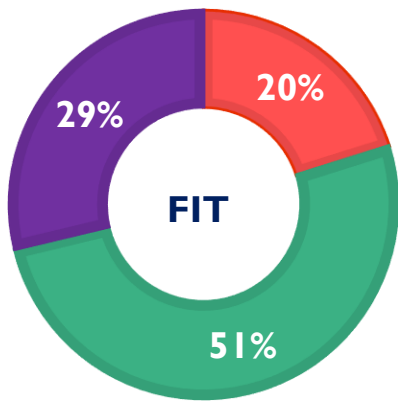
Hotel-hotel diminta untuk memilih 4 pasar terbesar mereka dan hampir 90% memilih pasar domestik. Selanjutnya pasar terbesar mereka adalah Tiongkok, Malaysia dan Singapore, menurut setengah dari hotel responden.

*The hotels were asked to select their top 4 source markets and nearly 90% chose the domestic market. There was quite a large drop then to China, Malaysia & Singapore which about half the hotels corroborate.*



## Pertanyaan 4: Bagaimana perkiraan Anda untuk pemulihan masing-masing segmen utama ini, setelah wabah COVID-19 berakhir?

Question 4: How are each of the major demand segments expected to recover, once the COVID-19 outbreak is over?

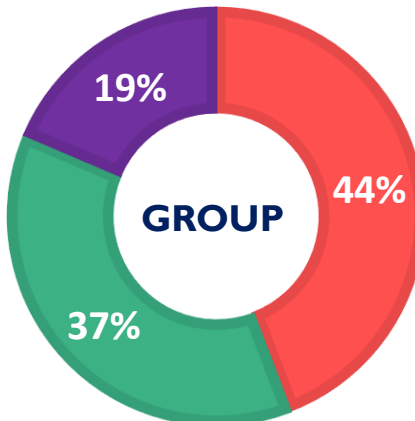
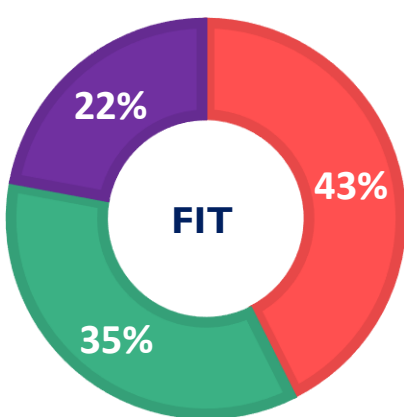


### DOMESTIC LEISURE

- Tidak mungkin pulih 100%  
Unlikely to recover 100%
- Situasi tetap sama seperti sebelum COVID-19 terjadi  
Same as pre-COVID-19
- Lebih baik dari sebelumnya  
Better than ever

Separuh dari responden hotel berpendapat bahwa *domestic leisure*, baik FIT maupun Grup akan pulih kembali pada level yang sama seperti pada masa sebelum COVID-19 terjadi begitu krisis ini berakhir. Untungnya ada sejumlah besar responden yang merasa bahwa FIT dan Grup akan menjadi lebih baik dari sebelumnya, namun ada juga mereka yang berpikir bahwa pasar *domestic leisure* tidak mungkin pulih 100%.

Half the hotels thought that **domestic leisure**, both FIT and group, would recover to levels seen before COVID-19 once the crisis ends. Fortunately, there were a larger number of respondents who thought both FIT and Group would be back better than ever, vis a vis those who thought the markets would never recover.



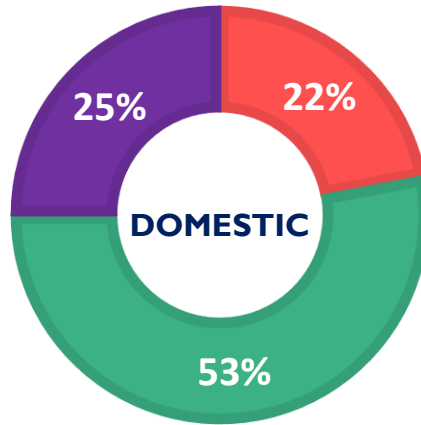
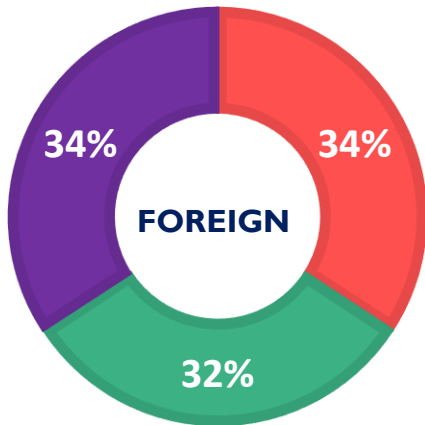
### FOREIGN LEISURE

- Tidak mungkin pulih 100%  
Unlikely to recover 100%
- Situasi tetap sama seperti sebelum COVID-19 terjadi  
Same as pre-COVID-19
- Lebih baik dari sebelumnya  
Better than ever

Sayangnya, sejumlah besar hotel berpendapat bahwa *foreign leisure*, FIT maupun Grup, TIDAK MUNGKIN PULIH 100% ke level yang sama pada masa sebelum COVID-19 terjadi. Sekitar sepertiga merasa bahwa pasar akan kembali normal seperti biasa (*status quo*), dan sejumlah kecil berpikir bahwa pasar *foreign leisure* akan pulih lebih baik dari sebelumnya.

Sadly, a very large number of hotels thought that **foreign leisure**, both FIT and Group, would NEVER recover to pre-COVID-19 levels. Around a third thought that the markets would recover *status quo* and a small number thought they'd bounce back better than ever.





## CORPORATE

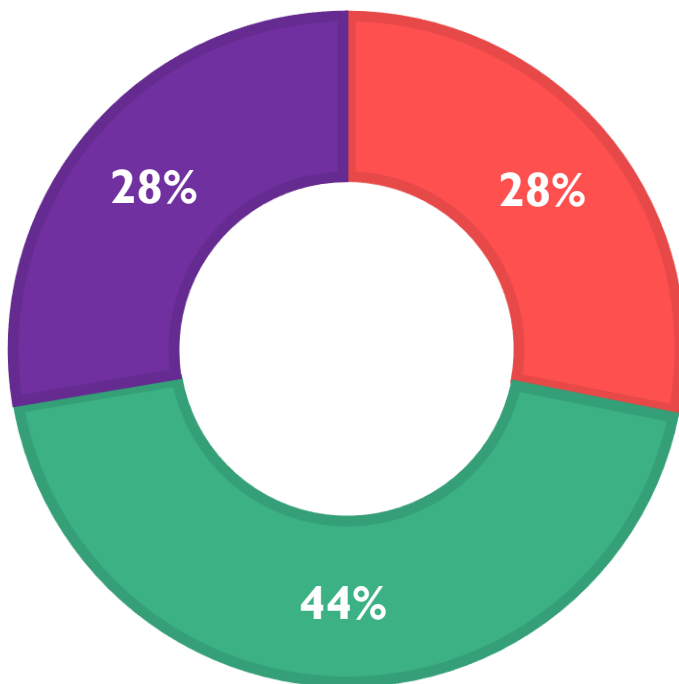
- Tidak mungkin pulih 100%  
*Unlikely to recover 100%*
- Situasi tetap sama seperti sebelum COVID-19 terjadi  
*Same as pre-COVID-19*
- Lebih baik dari sebelumnya  
*Better than ever*

Hampir 80% responden merasa bahwa *domestic corporate* akan pulih atau membaik, tetapi sepertiga dari mereka merasa *foreign corporate* tidak mungkin pulih 100%.

*Nearly 80% of respondents thought domestic corporate would recover or improve but a third thought foreign corporate would never recover.*

44% dari responden berpikir bahwa MICE akan pulih kembali pada level yang sama seperti sebelum COVID-19 terjadi, tapi pendapat sisa responden terbagi rata antara tidak mungkin pulih 100% dan lebih baik dari sebelumnya.

*44% of respondents thought that MICE would recover however the remaining respondents were evenly split between never returning to status quo & better than ever.*



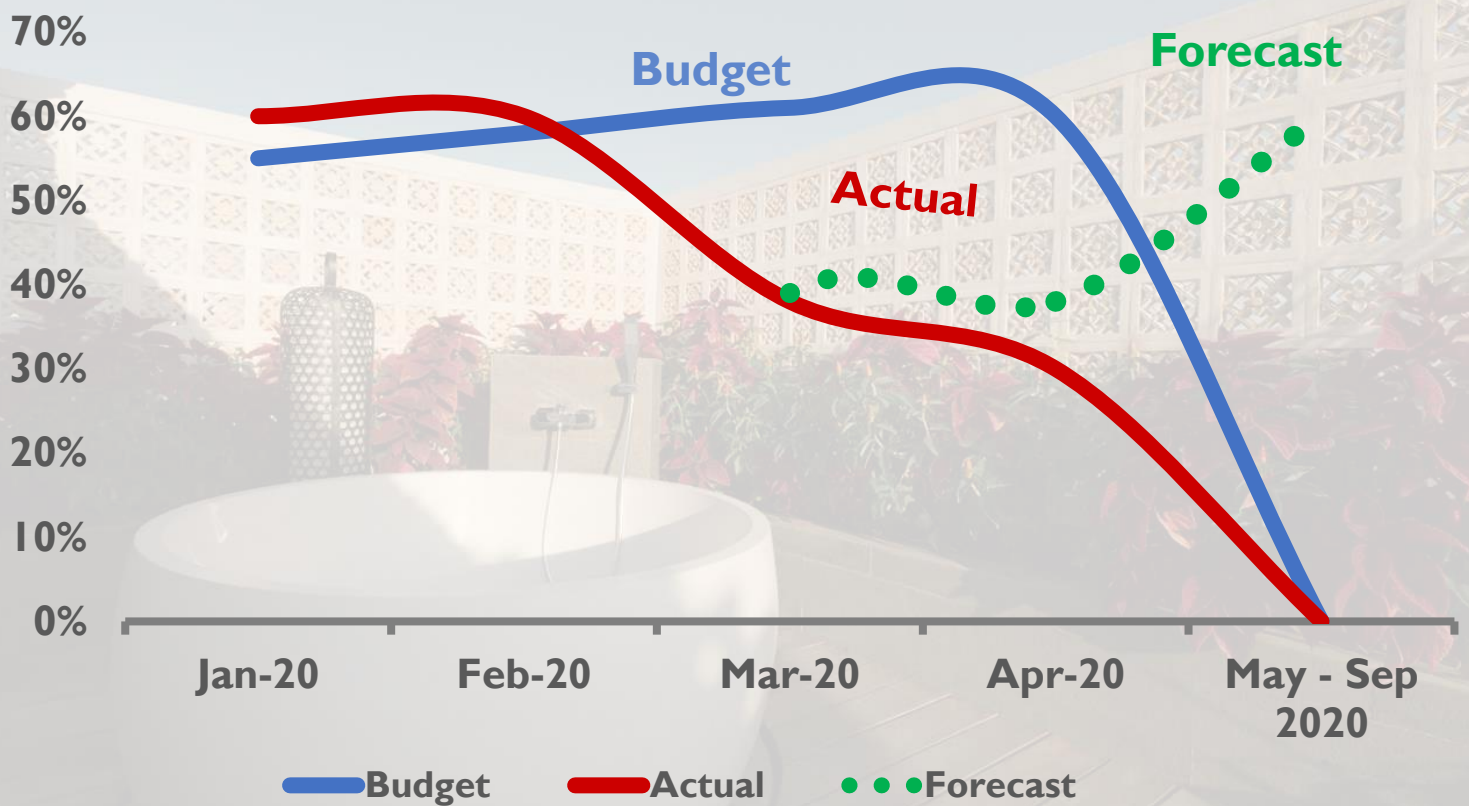
## MICE

- Tidak mungkin pulih 100%  
*Unlikely to recover 100%*
- Situasi tetap sama seperti sebelum COVID-19 terjadi  
*Same as pre-COVID-19*
- Lebih baik dari sebelumnya  
*Better than ever*

## Tingkat Hunian Kamar | PERKIRAAN VS AKTUAL DAN PROYEKSI

Occupancy | BUDGET VS. ACTUAL AND FORECAST

2020 Jan - Sep

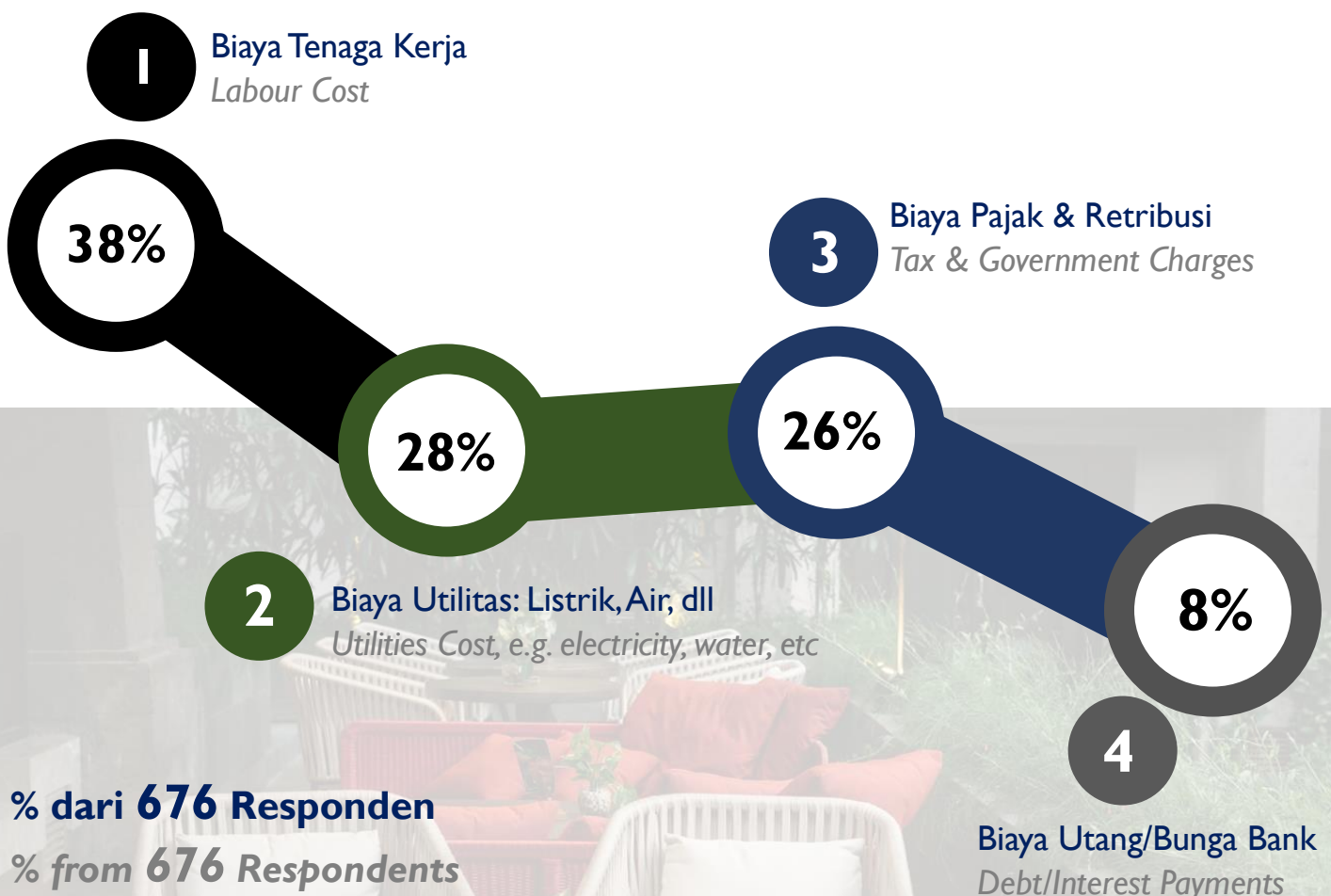


## Pertanyaan 5: Permasalahan utama yang dihadapi terkait Pengaruh Wabah COVID-19 terhadap bisnis Anda?

*Question 5: Your major business concerns related to Influence of the COVID-19 Outbreak?*

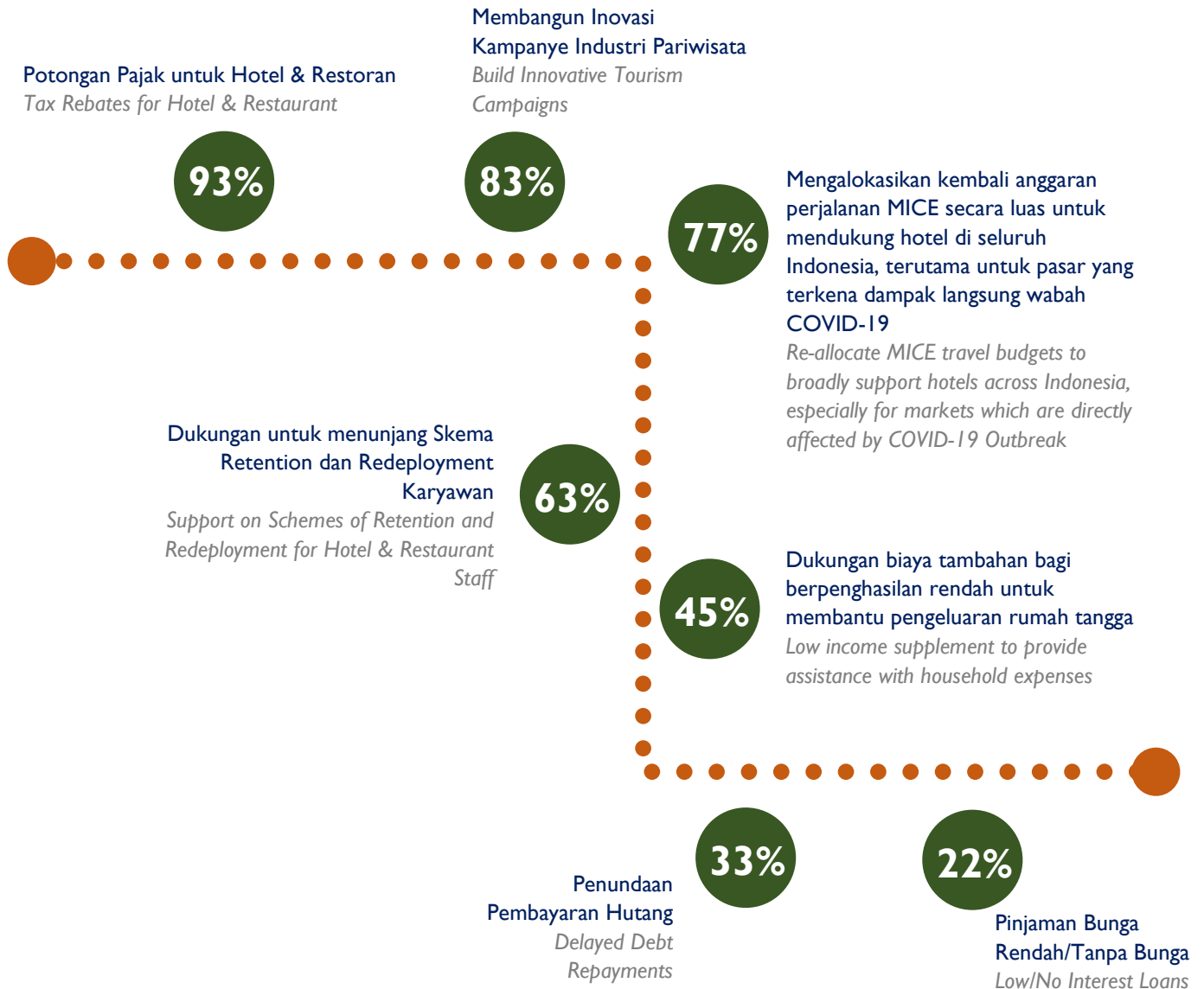
38% dari responden mengatakan bahwa biaya tenaga kerja adalah permasalahan yang paling utama, diikuti oleh biaya utilitas, pajak dan retribusi daerah. Hanya 8% responden yang memprioritaskan masalah pokok hutang & bunga pinjaman dari fasilitas kredit.

*38% of hotels consider labour costs their greatest concern, following by utilities and government taxes/fees. Only 8% of respondents prioritised debt repayments.*



## Pertanyaan 6: Apa ekspektasi Anda terhadap pemerintah untuk memberikan/membantu industri Anda dalam situasi ini?

Question 6: What do you expect government to provide/help for your industry during this situation?





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PHRI is an organization of Hotels, Restaurants, Food Suppliers, Food Catering Services and Tourism Education Institutions. The association is internationally known as Indonesia Hotel & Restaurant Association (PHRI), organization established on February 9, 1969. Head Office of the Association is in the capital city of Republic of Indonesia.

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