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The state of play
Spotlight on 2010
hotel performance





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Table 1: Global occupancy rankings

City	Ranking	Q1 2010		FY 2009
		Occupancy %	% change	Occupancy %
Canberra	1	85.6	15.4	76.0
Sydney	2	85.3	9.2	78.1
Phuket	3	82.4	33.1	56.1
Singapore	4	81.2	19.9	73.2
Perth	5	81.1	(4.0)	78.3
Adelaide	6	80.9	5.1	75.7
Auckland	7	80.5	6.1	67.1
Sharm El Sheikh	8	79.9	27.1	73.9
Hong Kong SAR	9	79.5	10.4	73.7
Dubai	10	78.6	9.8	68.9
Miami	11	77.9	9.7	64.7
San Juan	12	77.8	9.5	69.2
Seoul	13	77.6	(4.0)	80.8
Fort Lauderdale	14	77.4	7.2	63.0
Melbourne	15	77.2	2.2	73.3
Brisbane	16	76.5	5.9	76.5
Goa	17	76.1	13.2	63.2
Osaka	18	75.7	3.4	74.1
London	19	75.6	5.1	80.4
Manila	20	75.5	9.8	67.3

Source: STR Global & STR.

Table 2: Global ADR rankings

City	Ranking	Q1 2010		FY 2009
		ADR USD	% change	ADR USD
Geneva	1	301	7.1	293
Riyadh	2	269	0.0	252
Manama	3	262	12.0	220
Dubai	4	252	(10.1)	235
Muscat	5	251	(20.1)	262
Venice	6	250	(3.1)	352
Doha	7	250	(16.3)	263
Basel	8	248	4.7	207
Abu Dhabi	9	245	(30.5)	288
Tokyo	10	233	5.5	227
Beirut	11	220	31.8	211
Paris	12	215	8.4	235
Hainan	13	214	33.0	140
Delhi	14	206	4.0	178
Moscow	15	202	(3.6)	204
Zurich	16	199	3.8	193
Hong Kong SAR	17	197	17.7	168
Mumbai	18	192	(2.6)	180
San Juan	19	191	(8.4)	169
New York	20	188	(3.6)	215

Source: STR Global & STR.

Table 3: Global revPAR rankings

City	Ranking	Q1 2010		FY 2009
		RevPAR USD	% change	RevPAR USD
Dubai	1	198	(1.3)	162
Geneva	2	189	16.6	178
Riyadh	3	186	2.2	148
Manama	4	182	7.6	138
Tokyo	5	172	17.0	159
Doha	6	169	(21.2)	148
Muscat	7	161	(20.5)	139
Basel	8	160	9.1	133
Hong Kong SAR	9	157	29.9	124
Delhi	10	153	18.9	114
San Juan	11	148	0.3	117
Paris	12	147	11.1	172
Singapore	13	147	28.7	122
Miami	14	142	14.1	91
Abu Dhabi	15	141	(50.3)	199
Sydney	16	140	52.9	106
Beirut	17	138	25.6	151
New York	18	135	7.6	166
Canberra	19	134	64.8	99
London	20	133	18.8	147

Source: STR Global & STR.

Table 4: Global hotel supply pipeline

City	Supply as at March 2010	Expected increase in supply 2010 – 2015
	Rooms	%
Dubai	52,608	59.2
Geneva	9,298	0.9
Riyadh	6,087	55.4
Doha	6,754	112.5
Muscat	4,034	34.4
Tokyo	67,493	0.4
Basel	3,418	0.0
Hong Kong	52,220	1.8
Paris	128,955	1.1
London	103,299	8.6
Delhi	14,441	46.6
Singapore	43,145	11.2
Abu Dhabi	13,593	103.5
Manama	5,604	99.3
San Juan	5,485	0.7
Miami	47,356	11.0
Greater Sydney	36,075	1.7
Beirut	7,091	10.9
New York	91,738	24.5
Canberra	6,231	48.9

Source: STR Global & STR.

Table 5: The Americas

City	Currency	Q1 2010				FY 2009
		Occupancy %	ADR	RevPAR	RevPAR % change	RevPAR
Beunos Aires	ARS	63.2	527	333	5.3	298
Los Angeles	USD	64.8	115	75	1.5	73
Mexico City	MXN	54.1	1,454	787	(11.1)	736
Miami	USD	77.9	183	142	14.1	92
New York	USD	72.0	188	135	7.6	166
Rio de Janeiro	BRL	74.9	315	236	3.8	198
Sao Paulo	BRL	60.6	186	113	18.9	107
Toronto	CAD	59.6	127	76	2.0	81
Vancouver	CAD	65.3	178	116	61.2	87
Washington	USD	59.0	142	84	(12.6)	94

Source: STR Global & STR.



Table 6: Middle East & Africa

City	Currency	Q1 2010				FY 2009
		Occupancy %	ADR	RevPAR	RevPAR % change	RevPAR
Abu Dhabi	AED	57.6	900	519	(50.3)	740
Amman	JOD	54.2	106	57	8.4	64
Beirut	LBP	62.6	335,451	210,039	25.5	221,512
Cairo	EGP	68.0	722	491	0.7	468
Cape Town	ZAR	64.6	1,177	760	(4.5)	628
Dubai	AED	79.0	926	732	(0.8)	600
Jeddah	SAR	66.5	688	457	10.4	469
Johannesburg	ZAR	56.7	744	422	(7.2)	435
Muscat	OMR	64.2	98	63	(20.0)	54
Riyadh	SAR	69.2	1010	699	2.3	555

Source: STR Global.



Table 7: Europe

City	Currency	Q1 2010			FY 2009	
		Occupancy %	ADR	RevPAR	RevPAR % change	
Amsterdam	EUR	62.6	109	69	7.1	83
Athens	EUR	49.0	94	46	(9.7)	65
Berlin	EUR	57.9	89	51	9.5	54
Dublin	EUR	55.8	77	43	(9.5)	55
Geneva	CHF	62.9	321	202	7.5	200
Istanbul	TRY	61.4	239	146	0.1	197
London	GBP	75.8	115	87	10.3	93
Paris	EUR	68.5	158	108	5.5	123
Rome	EUR	53.6	116	62	(1.0)	86
Stockholm	SEK	58.3	1,061	618	(2.7)	708

Source: STR Global.



Table 8: Asia Pacific

City	Currency	Q1 2010				FY 2009
		Occupancy %	ADR	RevPAR	RevPAR % change	RevPAR
Bangkok	THB	65.8	3,268	2,151	12.0	1,742
Beijing	CNY	53.9	610	329	28.0	327
Hong Kong SAR	HKD	79.5	1,532	1,219	30.1	956
Melbourne	AUD	77.7	182	142	(0.9)	131
Mumbai	INR	67.5	8,833	5,966	3.2	5,403
New Delhi	INR	75.9	9,483	7,200	9.7	5,556
Seoul	KRW	77.6	172,604	133,993	2.3	143,898
Shanghai	CNY	49.2	746	367	18.5	366
Sydney	AUD	85.3	183	156	11.7	135
Tokyo	JPY	74.0	21,136	15,650	11.9	15,047

Source: STR Global.



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