

**HotelBenchmark Survey
Summary report**

January 2003

Summary report

International coverage since 1996

Business data for informed decision-making.

14 independent monthly surveys

Rate & Occupancy

Asia Pacific

Australia

Belgium & The Netherlands

Caribbean and Latin America

Europe

Germany

Italy

London

Middle East and Africa

New Zealand

South Africa

United Kingdom

Profitability

Germany

Luxury London

With a track record as the definitive source of hospitality data, the HotelBenchmark Survey provides timely feedback on hotel performance and market trends to better inform key decision makers. With over 6,000 contributing hotels, the survey monitors market and financial performance in over 300 key hotel markets across 140 countries on a monthly and annual basis.

Rate & Occupancy surveys

Twelve unique occupancy and rate reports are published every month. Our four regional reports covering Asia Pacific, Caribbean and Latin America, Europe and the Middle East and Africa are supplemented by eight in-depth country/city reports covering Australia, Belgium & The Netherlands, Germany, Italy, New Zealand, South Africa, the United Kingdom and London. Our coverage is always expanding, enabling new surveys to be developed.

Results of the rate and occupancy surveys are accessible online, with preliminary data available by the middle of each month.

Profitability surveys

On a monthly basis, profit and loss surveys are currently produced for both the German and luxury London markets, with the results available to contributors online. To expand this service across the rest of the world, we would encourage hoteliers to submit their profitability data on a monthly basis. In 2002, we reported on the performance of 40 cities across Asia Pacific, Europe and the Middle East in our annual profitability survey.

For further information please contact:

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Results accessible online at

www.HotelBenchmark.com

January performance

The HotelBenchmark Survey by Deloitte & Touche is the leading survey of its kind, containing data from over **6,000 hotels** across all areas of the world outside of North America. The results below reflect a sample of the **320 markets** on which we report on a monthly basis, providing depth of coverage and sample sizes, which are unsurpassed in the majority of regions. To learn more, visit our web site at www.HotelBenchmark.com or contact us at HotelBenchmark@deloitte.co.uk.

January performance in US dollars	Occupancy		Average room rate		RevPAR	
	2003 %	Change	2003 US\$	Change	2003 US\$	Change
Asia Pacific (HotelBenchmark sample represents approximately 1,100 hotels across the region)						
Auckland	75.6	6.0%	75	43.3%	57	51.9%
Beijing	56.8	-7.0%	75	2.8%	43	-4.4%
Hong Kong	77.5	0.3%	118	4.5%	92	4.8%
Singapore	66.7	-0.1%	83	0.3%	55	0.2%
Sydney Central	74.1	15.9%	92	20.2%	68	39.3%
Tokyo	71.0	4.9%	171	5.1%	122	10.3%
Caribbean and Latin America (HotelBenchmark sample represents approximately 370 hotels across the region)						
Buenos Aires	45.2	31.3%	78	-17.5%	35	8.3%
Mexico City	60.2	-2.9%	129	-4.9%	77	-7.7%
Quito	51.8	16.2%	76	7.0%	39	24.4%
Sao Paulo	35.6	-9.8%	71	-34.8%	25	-41.2%
Santiago	51.7	8.4%	89	-9.8%	46	-2.2%
Europe (HotelBenchmark sample represents approximately 3,750 hotels across the region)						
Amsterdam	58.6	-8.4%	128	19.6%	75	9.6%
Berlin	45.2	-6.6%	93	16.1%	42	8.4%
Brussels	49.7	-5.5%	107	23.5%	53	16.7%
London	63.4	2.7%	150	13.0%	95	16.0%
Madrid	56.1	-1.8%	149	20.5%	83	18.4%
Paris	61.8	3.4%	180	24.7%	111	29.0%
Rome	49.2	1.6%	157	26.8%	77	28.8%
Vienna	47.2	8.3%	94	26.7%	44	37.3%
Middle East (HotelBenchmark sample represents 700 hotels across the Middle East & Africa)						
Cairo - All	62.6	24.0%	61	-12.8%	38	8.1%
Dubai - All	86.1	10.3%	138	21.9%	119	34.4%
Jerusalem	39.3	-2.7%	62	9.5%	24	6.6%
Riyadh	75.6	2.1%	117	-5.4%	89	-3.4%

NOTES

Contributing hotels include both independent and group operated units and the sample is typically representative of quality hotel supply. To ensure direct comparability of results, only hotels that have been able to provide two full years of trading data have been included in this survey. The exception however, is that new hotel openings are now included in the results.

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Rolling 12 months to end of January 2003

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Rolling 12 months to end of January 2003 in US dollars	Occupancy		Average room rate		RevPAR	
	2003 %	Change	2003 US\$	Change	2003 US\$	Change
Asia Pacific (HotelBenchmark sample represents approximately 1,100 hotels across the region)						
Auckland	71.4	8.9%	62	22.6%	44	33.5%
Beijing	75.5	4.5%	79	3.5%	60	8.1%
Hong Kong	78.5	4.4%	117	-3.1%	92	1.2%
Singapore	70.5	-0.4%	84	-5.2%	60	-5.6%
Sydney Central	72.7	7.1%	84	4.9%	61	12.3%
Tokyo	79.9	2.8%	174	-1.0%	139	1.8%
Caribbean and Latin America (HotelBenchmark sample represents approximately 370 hotels across the region)						
Buenos Aires	42.6	-17.2%	83	-41.2%	35	-51.3%
Mexico City	66.2	1.6%	132	-2.0%	87	-0.4%
Quito	51.9	0.8%	74	3.6%	39	4.4%
Sao Paulo	46.6	-8.1%	90	-27.8%	42	-33.6%
Santiago	51.0	6.2%	97	-16.4%	50	-11.2%
Europe (HotelBenchmark sample represents approximately 3,750 hotels across the region)						
Amsterdam	77.8	-2.1%	137	7.3%	106	5.0%
Berlin	61.3	-6.2%	93	9.7%	57	2.9%
Brussels	63.8	-5.4%	98	7.3%	62	1.4%
London	75.4	3.2%	153	0.3%	115	3.5%
Madrid	68.7	-0.4%	137	9.0%	94	8.6%
Paris	72.5	-0.5%	178	12.1%	129	11.6%
Rome	68.0	-4.8%	161	12.6%	110	7.3%
Vienna	67.5	0.7%	84	5.3%	57	6.0%
Middle East (HotelBenchmark sample represents 700 hotels across the Middle East & Africa)						
Cairo - All	65.0	6.1%	64	-19.9%	42	-15.1%
Dubai - All	79.0	8.8%	114	2.3%	90	11.3%
Jerusalem	33.2	-2.7%	70	-4.2%	23	-6.8%
Riyadh	61.6	9.0%	114	-1.7%	70	7.1%

NOTES

Contributing hotels include both independent and group operated units and the sample is typically representative of quality hotel supply. To ensure direct comparability of results, only hotels that have been able to provide two full years of trading data have been included in this survey. The exception however, is that new hotel openings are now included in the results.

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Selection of markets covered by the HotelBenchmark Survey

<p>Asia Pacific</p> <p>Bali</p> <p>Bangkok</p> <p>Beijing</p> <p>Guam</p> <p>Ho Chi Minh City</p> <p>Hong Kong</p> <p>Hong Kong - Island</p> <p>Hong Kong - Kowloon</p> <p>Jakarta</p> <p>Kuala Lumpur</p> <p>Manila</p> <p>Manila - Bay Area</p> <p>Manila - Makati</p> <p>Nanjing</p> <p>Osaka</p> <p>Penang</p> <p>Phuket</p> <p>Seoul</p> <p>Shanghai</p> <p>Singapore</p> <p>Singapore - Marina Square</p> <p>Singapore - Orchard Road</p> <p>Surabaya</p> <p>Taipei</p> <p>Tokyo</p> <p>Xian</p> <p>Yangon</p> <p>Australia</p> <p>Adelaide</p> <p>Brisbane</p> <p>Cairns</p> <p>Canberra</p> <p>Gold Coast</p> <p>Hobart</p> <p>Melbourne</p> <p>Northern Territory</p> <p>Perth</p> <p>Regional NSW</p> <p>Sydney</p> <p>Tropical North Queensland</p> <p>Sydney AARR <AUD\$150</p> <p>Sydney AARR AUD\$150-\$200</p> <p>Sydney AARR >AUD\$200</p> <p>Sydney < 100 rooms</p> <p>Sydney 100-300 rooms</p> <p>Sydney > 300 rooms</p> <p>Sydney Central</p> <p>Sydney CBD</p> <p>Sydney CBD Fringe</p> <p>Sydney Outer</p> <p>Sydney North</p> <p>Sydney West</p> <p>Sydney Airport/South</p> <p>Melbourne Central</p> <p>Melbourne CBD</p> <p>Melbourne CBD Fringe</p> <p>Caribbean and Latin America</p> <p>Barbados</p> <p>Buenos Aires</p> <p>Cancun</p> <p>Caracas</p> <p>Lima</p> <p>Mexico City</p>	<p>Panama City</p> <p>Puerto Rico</p> <p>Puerto Vallarta</p> <p>Quito</p> <p>Rio de Janeiro</p> <p>San Jose</p> <p>Santiago</p> <p>Sao Paulo</p> <p>South Africa</p> <p>Grade 5 - All Hotels</p> <p>Grade 4 - All Hotels</p> <p>Grade 3 - All Hotels</p> <p>Primary Cities - All Grades</p> <p>Primary Cities - Grade 4</p> <p>Primary Cities - Grade 5</p> <p>Secondary Cities - All Hotels</p> <p>Cape Town</p> <p>Durban</p> <p>Johannesburg</p> <p>Pretoria</p> <p>Eastern Cape</p> <p>Free State</p> <p>Gauteng</p> <p>Kwazulu-Natal</p> <p>Mpumulanga</p> <p>Western Cape</p> <p>Europe</p> <p>Amsterdam</p> <p>Amsterdam - Schiphol</p> <p>Athens</p> <p>Baku</p> <p>Barcelona</p> <p>Brussels</p> <p>Budapest</p> <p>Copenhagen</p> <p>Cote d'Azur</p> <p>Cyprus</p> <p>Dublin</p> <p>Eilat</p> <p>Geneva</p> <p>Gothenburg</p> <p>Helsinki</p> <p>Istanbul</p> <p>Jerusalem</p> <p>Lisbon</p> <p>London</p> <p>Madrid</p> <p>Malta</p> <p>Milan</p> <p>Moscow</p> <p>Paris - Central</p> <p>Paris - CDG</p> <p>Paris - AARR > 200 Euros</p> <p>Paris - AARR 100 - 200 Euros</p> <p>Paris - AARR < 100 Euros</p> <p>Prague</p> <p>Riga</p> <p>Rome</p> <p>Salzburg</p> <p>Stockholm</p> <p>Tel Aviv</p> <p>Vienna</p> <p>Warsaw</p> <p>Zurich</p>	<p>Belgium & The Netherlands</p> <p>Belgium & Netherlands >150 rooms</p> <p>Belgium & Netherlands 100 - 150 rooms</p> <p>Belgium & Netherlands <100 rooms</p> <p>Antwerp</p> <p>Brussels</p> <p>Brussels AARR > 100 Euros</p> <p>Brussels AARR < 100 Euros</p> <p>Brussels - Zaventum</p> <p>Netherlands Primary cities</p> <p>Netherlands Secondary cities</p> <p>Netherlands - North West</p> <p>Netherlands - Central</p> <p>Netherlands - South West</p> <p>Netherlands - South East</p> <p>Amsterdam</p> <p>Amsterdam AARR > 150 Euros</p> <p>Amsterdam AARR 100 - 150 Euros</p> <p>Amsterdam AARR <100 Euros</p> <p>Amsterdam - Schiphol</p> <p>The Hague</p> <p>Rotterdam</p> <p>Germany</p> <p>Germany Primary Cities</p> <p>Germany Secondary Cities</p> <p>Germany Resort and Regional</p> <p>Germany Airport Hotels</p> <p>Germany AARR >100 Euros</p> <p>Germany AARR 50-100 Euros</p> <p>Germany AARR <50 Euros</p> <p>Germany <100 rooms</p> <p>Germany 100-150 rooms</p> <p>Germany 150-200 rooms</p> <p>Germany 200-250 rooms</p> <p>Germany >250 rooms</p> <p>Baden Wurttemberg</p> <p>Bayern</p> <p>Hessen</p> <p>Niedersachsen</p> <p>Nordrhein Westfalen</p> <p>Berlin</p> <p>Bremen</p> <p>Dortmund</p> <p>Dresden</p> <p>Düsseldorf</p> <p>Essen</p> <p>Frankfurt</p> <p>Frankfurt Umgebung</p> <p>Freiburg</p> <p>Hamburg</p> <p>Hannover</p> <p>Heidelberg</p> <p>Kassel</p> <p>Köln</p> <p>Leipzig</p> <p>Lubeck</p> <p>Mainz</p> <p>Mannheim</p> <p>München</p> <p>München Airport</p> <p>Nürnberg</p> <p>Rostock</p> <p>Stuttgart</p> <p>Schwerin</p> <p>Wiesbaden</p>	<p>Italy</p> <p>Italy Primary Cities</p> <p>Italy Secondary Cities</p> <p>Italy Resort and Regional</p> <p>Italy AARR >200 Euros</p> <p>Italy AARR 100 - 200 Euros</p> <p>Italy AARR <100 Euros</p> <p>Italy <100 rooms</p> <p>Italy 100-200 rooms</p> <p>Italy >200 rooms</p> <p>Bologna</p> <p>Florence</p> <p>Milan</p> <p>Milan AARR >150 Euros</p> <p>Milan AARR 100 - 150 Euros</p> <p>Milan AARR <100 Euros</p> <p>Rome</p> <p>Rome AARR >200 Euros</p> <p>Rome AARR 100 - 150 Euros</p> <p>Rome AARR <100 Euros</p> <p>Turin</p> <p>Venice</p> <p>London</p> <p>Central London</p> <p>Outer London</p> <p>AARR >£200</p> <p>AARR £160-£200</p> <p>AARR £110-£160</p> <p>AARR £80-£110</p> <p>AARR <£80</p> <p>AARR <£80 and >400 rooms</p> <p>AARR <£80 and <400 rooms</p> <p>Rooms >500</p> <p>Rooms 300-500</p> <p>Rooms 100-300</p> <p>Townhouse/Boutique hotels</p> <p>Middle East and Africa</p> <p>Abu Dhabi</p> <p>Alexandria</p> <p>Amman</p> <p>Beirut</p> <p>Cairo - City Centre</p> <p>Cairo - Heliopolis</p> <p>Cairo - Pyramids</p> <p>Casablanca</p> <p>Damascus</p> <p>Doha</p> <p>Dubai</p> <p>Dubai - City Centre</p> <p>Dubai - Jumeirah Beach</p> <p>Hurghada</p> <p>Jeddah</p> <p>Karachi</p> <p>Kuwait</p> <p>Luxor</p> <p>Makkah and Medina</p> <p>Manama</p> <p>Marrakech</p> <p>Muscat</p> <p>Provincial Saudi Arabia</p> <p>Red Sea resorts</p> <p>Riyadh</p> <p>Sharm El-Sheikh</p> <p>UAE Regional</p>	<p>New Zealand</p> <p>North Island</p> <p>South Island</p> <p>New Zealand <150 rooms</p> <p>New Zealand >150 rooms</p> <p>New Zealand AARR >NZ\$100</p> <p>New Zealand AARR <NZ\$100</p> <p>Auckland</p> <p>Christchurch</p> <p>Queenstown</p> <p>Rotorua</p> <p>Wellington</p> <p>United Kingdom</p> <p>Regional UK</p> <p>England (excluding London)</p> <p>Scotland</p> <p>Wales</p> <p>UK AARR <£50</p> <p>UK AARR £50-£75</p> <p>UK AARR >£75</p> <p>UK <100 rooms</p> <p>UK 100-150 rooms</p> <p>UK >150 rooms</p> <p>Aberdeen</p> <p>Belfast</p> <p>Berkshire</p> <p>Birmingham</p> <p>Bournemouth</p> <p>Brighton</p> <p>Bristol</p> <p>Cardiff</p> <p>Cheshire</p> <p>Edinburgh</p> <p>Essex</p> <p>Gatwick</p> <p>Glasgow</p> <p>Greater Manchester</p> <p>Hampshire</p> <p>Heathrow</p> <p>Hertfordshire</p> <p>Jersey</p> <p>Lancashire</p> <p>Leeds</p> <p>Liverpool</p> <p>London - Central</p> <p>London - Outer</p> <p>Manchester</p> <p>Merseyside</p> <p>M2/M20 Corridor</p> <p>M4 Corridor</p> <p>Newcastle</p> <p>Nottingham</p> <p>Reading</p> <p>Sheffield</p> <p>Somerset and Avon</p> <p>Swindon</p> <p>Warwickshire</p> <p>West Midlands</p> <p>York</p> <p>Country house hotel with golf</p> <p>Country house hotel without golf</p>
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