

### Average rates fall in Dubai but rise in Abu Dhabi

Four and five star hotels in Dubai saw average room rates (ARR) fall by 5.5% to US\$380.85 in March, according to the latest data from HotStats. Occupancy levels remained stable during the month at 88.8%, however the reduction in ARR had a flow-on effect on revenue per available room (RevPAR) which fell by 4.8% to US\$338.25. A reduction in food and beverage revenues further reduced total revenue per available room (TRevPAR) which dropped by 8.9%. Although operational expenses were marginally reduced, the lower overall revenues resulted in gross operating profit per available room (GOPPAR) falling by 7.8% to US\$306.62.

Conversely, hotels in the neighbouring Abu Dhabi recorded a 6.5% growth in ARR to US\$167.62 as the market capitalised on strong visitor demand with hotels in the Emirate achieving an average occupancy level of 83.9%, an increase of 1.3 percentage points on the same period last year. The strong rate performance boosted RevPAR levels and offset a reduction in food and beverage revenues, allowing TRevPAR to rise by 4.1% to US\$287.50. As a result of stronger revenues, GOPPAR levels increased by 2.2% to US\$107.53.

### Beirut and Sharm El Sheikh hotels witness a boost in occupancy on the back of strong demand

Hotels in Beirut saw occupancy levels increase by 17.5 percentage points to 57.9% as the city saw a rise in visitor numbers. The growth in demand allowed hoteliers to yield higher ARR's, which grew by 6.1% to US\$143.77 and drove a significant increase in RevPAR of 52.0% to US\$83.24. However, the increase in rooms revenue was

not enough to reverse a large reduction in food and beverage demand and TRevPAR fell by 15.0% compared to the same period last year.

The four and five star hotels in Sharm El Sheikh continued to benefit from a revival in tourism activity to the Red Sea destination. Occupancy levels rose 9.3 percentage points during March, fuelling a 25.2% increase in ARR to US\$43.57, and a subsequent 47.0% rise in RevPAR. Softer food and beverage demand had a marginal impact on the growth in total revenue, however significantly lower operating expenses helped to deliver a GOPPAR increase of 68.6% to US\$14.11.

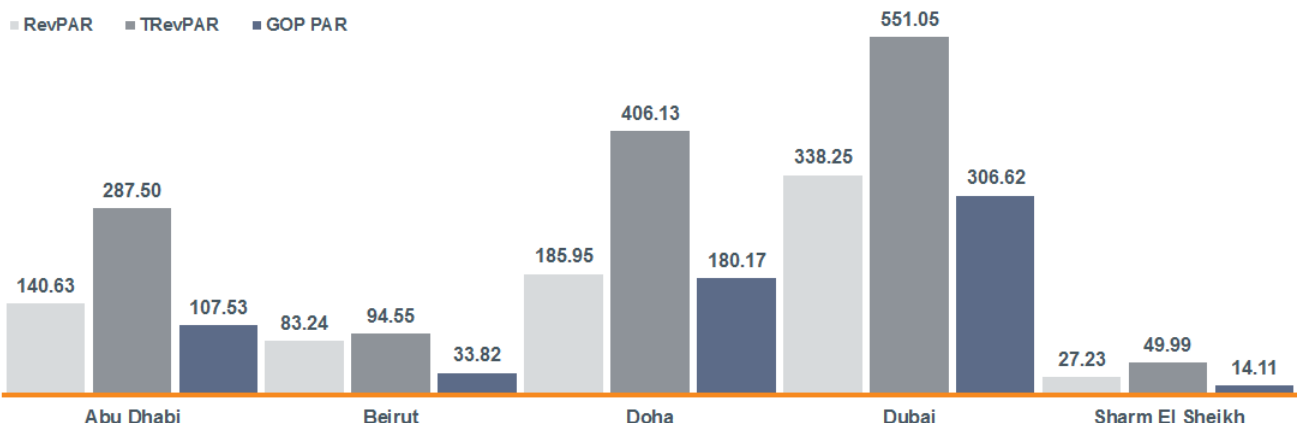
### Revenues up but profits down in Doha hotels

Strengthening demand and higher ARR's in four and five star hotels in Doha drove a 6.6% rise in RevPAR to US\$185.95 in March. Doha's increased attraction as a regional tourist and transit hub has resulted in a greater number of visitors to the country, which is having a positive impact on hotel performance. Although rooms revenue increased during the month, lower food and beverage revenues softened the TRevPAR growth to 3.8%. Higher operational expenses had a significant impact on bottom-line performance as it reversed the increase in overall revenues and drove GOPPAR down by 3.5% to US\$180.17.

#### The month of March 2015

\$ Dollars	Occ %	ARR	RevPAR	TRevPAR	Payroll %	GOP PAR
Abu Dhabi	83.9	167.62	140.63	287.50	26.8	107.53
Beirut	57.9	143.77	83.24	94.55	55.3	33.82
Doha	82.6	225.13	185.95	406.13	20.5	180.17
Dubai	88.8	380.85	338.25	551.05	16.5	306.62
Sharm El Sheikh	62.5	43.57	27.23	49.99	23.4	14.11

### MENA City Markets achieved **REVPAR**, **TREVPAR** and **GOPAR** March 2015



## Editor's Notes

The hotels profiled in this report are drawn from the HotStats database and reflect the portfolios and distribution of the hotel chains that we survey and which operate primarily in the full-service sector.

**Please note:** The data samples are reviewed and rebased each year to reflect the changes in the HotStats survey base. As a result, performance ratios published last year may differ from those contained within this report.

## HotStats Services

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HotStats provides two reporting tools to hoteliers:

- Our unique profit and loss benchmarking service enables monthly comparison of hotels' performance against a competitive set. It is distinguished by the fact that it provides in excess of 100 performance metrics covering 70 hotel performance, revenue, cost and profit statistics providing the deepest insight available into hotel operations.
- Our latest innovation in daily revenue intelligence, MORSE. Amongst its reporting are daily and highly granular market segmentation metrics as well as distribution channel and source of booking analysis. It takes daily market intelligence to a whole new level.

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Sharm El Sheikh	62.5	43.57	27.23	49.99	23.4	14.11

### Calendar year to March 2015

	Occ %	ARR	RevPAR	TRevPAR	Payroll %	GOP PAR
	82.0	179.64	147.31	292.08	27.1	109.11
	54.2	144.71	78.41	123.63	42.9	26.04
	81.4	227.06	184.77	402.37	21.2	179.24
	87.9	377.77	332.13	536.75	17.9	289.23
	56.5	41.69	23.56	44.20	27.3	9.11

### Twelve months to March 2015

	Occ %	ARR	RevPAR	TRevPAR	Payroll %	GOP PAR	
	77.4	163.16	126.21	262.32	28.9	83.73	Abu Dhabi
	56.1	141.97	79.70	139.87	35.9	24.52	Beirut
	72.3	220.91	159.81	361.32	22.1	152.33	Doha
	80.3	332.49	266.87	470.00	20.5	216.69	Dubai
	62.6	44.48	27.86	50.71	22.2	14.34	Sharm El Sheikh

### The month of March 2014

	Occ%	ARR	RevPAR	TRevPAR	Payroll %	GOP PAR
Abu Dhabi	82.6	157.36	130.02	276.14	25.9	105.19
Beirut	40.4	135.56	54.78	111.22	42.7	5.42
Doha	79.8	218.64	174.39	391.39	19.4	186.80
Dubai	88.2	402.98	355.31	604.98	15.5	332.69
Sharm El Sheikh	53.2	34.80	18.52	37.28	23.9	8.37

### Calendar year to March 2014

	Occ%	ARR	RevPAR	TRevPAR	Payroll %	GOP PAR
	79.2	161.44	127.86	269.07	27.3	95.30
	40.3	137.04	55.19	109.28	45.9	0.74
	74.9	217.01	162.45	356.31	21.7	158.87
	87.2	393.62	343.30	580.16	16.8	309.34
	56.2	35.56	19.97	40.41	24.1	10.15

### Twelve months to March 2014

	Occ %	ARR	RevPAR	TRevPAR	Payroll %	GOP PAR	
	72.7	155.58	113.09	243.61	29.7	71.65	Abu Dhabi
	47.9	138.35	66.21	130.29	38.4	9.94	Beirut
	63.3	216.41	137.08	310.09	23.6	123.81	Doha
	80.0	335.33	268.31	470.93	19.8	215.54	Dubai
	56.6	39.56	22.40	43.27	21.8	12.45	Sharm El Sheikh

### Movement for the month of March

	Occ Change	ARR Change	RevPAR Change	TRevPAR Change	Payroll Change	GOP PAR Change
Abu Dhabi	1.3	6.5%	8.2%	4.1%	-0.9	2.2%
Beirut	17.5	6.1%	52.0%	-15.0%	-12.5	524.0%
Doha	2.8	3.0%	6.6%	3.8%	-1.1	-3.5%
Dubai	0.6	-5.5%	-4.8%	-8.9%	-1.0	-7.8%
Sharm El Sheikh	9.3	25.2%	47.0%	34.1%	0.5	68.6%

### Movement for the calendar year to March

	Occ Change	ARR Change	RevPAR Change	TRevPAR Change	Payroll Change	GOP PAR Change
	2.8	11.3%	15.2%	8.6%	0.2	14.5%
	13.9	5.6%	42.1%	13.1%	3.0	3418.9%
	6.5	4.6%	13.7%	12.9%	0.5	12.8%
	0.7	-4.0%	-3.3%	-7.5%	-1.2	-6.5%
	0.3	17.2%	18.0%	9.4%	-3.2	-10.2%

### Movement for the twelve months to March

	Occ Change	ARR Change	RevPAR Change	TRevPAR Change	Payroll Change	GOP PAR Change	
	4.7	4.9%	11.6%	7.7%	0.8	16.9%	Abu Dhabi
	8.3	2.6%	20.4%	7.4%	2.5	146.7%	Beirut
	9.0	2.1%	16.6%	16.5%	1.6	23.0%	Doha
	0.3	-0.8%	-0.5%	-0.2%	-0.7	0.5%	Dubai
	6.0	12.4%	24.4%	17.2%	-0.4	15.2%	Sharm El Sheikh