UNWTO - hotel performance update

Philip Wooller – Area Director Middle East & Africa
Global Occupancy for Q1 at 49.4%
Occupancy, Q1 2020

- North America: 51.6%
- Central America: 51.2%
- South America: 47.7%
- Northern Africa: 46.5%
- Southern Africa: 50.1%
- Europe: 48.8%
- Middle East: 59.2%
- Asia: 42.1%
- Australia & Oceania: 62.7%
Global RevPAR % Change
USD, Europe in EUR, Constant Currency, Q1 2020
Global Occupancy now at 23.4%............
Occupancy, April 2020

North America
- 23.1%

Central America
- 7.8%

Southern America
- 10.8%

Northern Africa
- 10.6%

Southern Africa
- 13.9%

Europe
- 10.1%

Middle East
- 30.5%

Asia
- 29.1%

Australia & Oceania
- 22.1%
Global RevPAR % Change
USD, Europe in EUR, Constant Currency, April 2020

North America: -80.8%
Central America: -89.7%
South America: -86.8%
Europe: -90.6%
Northern Africa: -90.2%
Middle East: -74.2%
Asia: -77.2%
Australia & Oceania: -78.9%
Africa
Africa cases continue to rise
Travel extremely restricted

Map of Member States that are imposing travel restrictions (as of 05 April 2020 20:00 EAT)

- **43** Full border closures¹
- **7** International air traffic closures
- **2** Travel restrictions to and from specific countries
- **3** Entry/Exit restrictions²

Most Member States have imposed mandatory quarantine for all travelers or travelers arriving from high risk areas.

¹ Some countries still allow cargo, freight and emergency transport into and out of the country; Some MSs will still allow citizens and residents to enter but all borders are essentially closed.
² Banning entry or exit of citizens or suspending visa issuance to specific countries.

Source: Africa CDC
Lockdowns easing soon

Ghana lifts lockdown, citing improved testing and 'severe' impact on the poor

South Africa discusses lifting lockdown sector by sector

Tanzanian president rules out lockdown amid COVID-19 pandemic
Most key African markets hovering close to low points
Actual Occ %

Source: STR. 2020 © CoStar Realty Information, Inc.
Occupancies have pretty much bottomed out

African markets, Week ending 26th April 2020, Occupancy and % change vs same week prior year

- Lagos: -44%
- Casablanca: -69%
- Addis Ababa: -63%
- Cape Town: -82%
- Nairobi: -85%
- Cairo: -92%

Source: STR. 2020 © CoStar Realty Information, Inc.
Occupancy drives RevPAR declines
RevPAR % Change, Local Currency, Week ending 26th April 2020

- Casablanca: -90
- Cairo: -95
- Lagos: -68
- Addis Ababa: -78
- Nairobi: -91
- Cape Town: -91

Source: STR. 2020 © CoStar Realty Information, Inc.
China Recovers Slightly. US & Europe Plateau. Absolute Occ %, Select Countries
China Shows Recovery After National Shutdown
Since U.S. Occ Is Still Much Higher, Recovery Will Take Longer

Absolute Occ %, Select Countries, Aligned by level of OCC

- China
- US
- Europe

Week End:
- US 3/7
- China: 1/18
- Europe 2/29

Week End:
- US 4/25
- Europe 4/25
- China: 4/25
Thank You