



Middle East hotel performance update

Philip Wooller – Area Director MEA



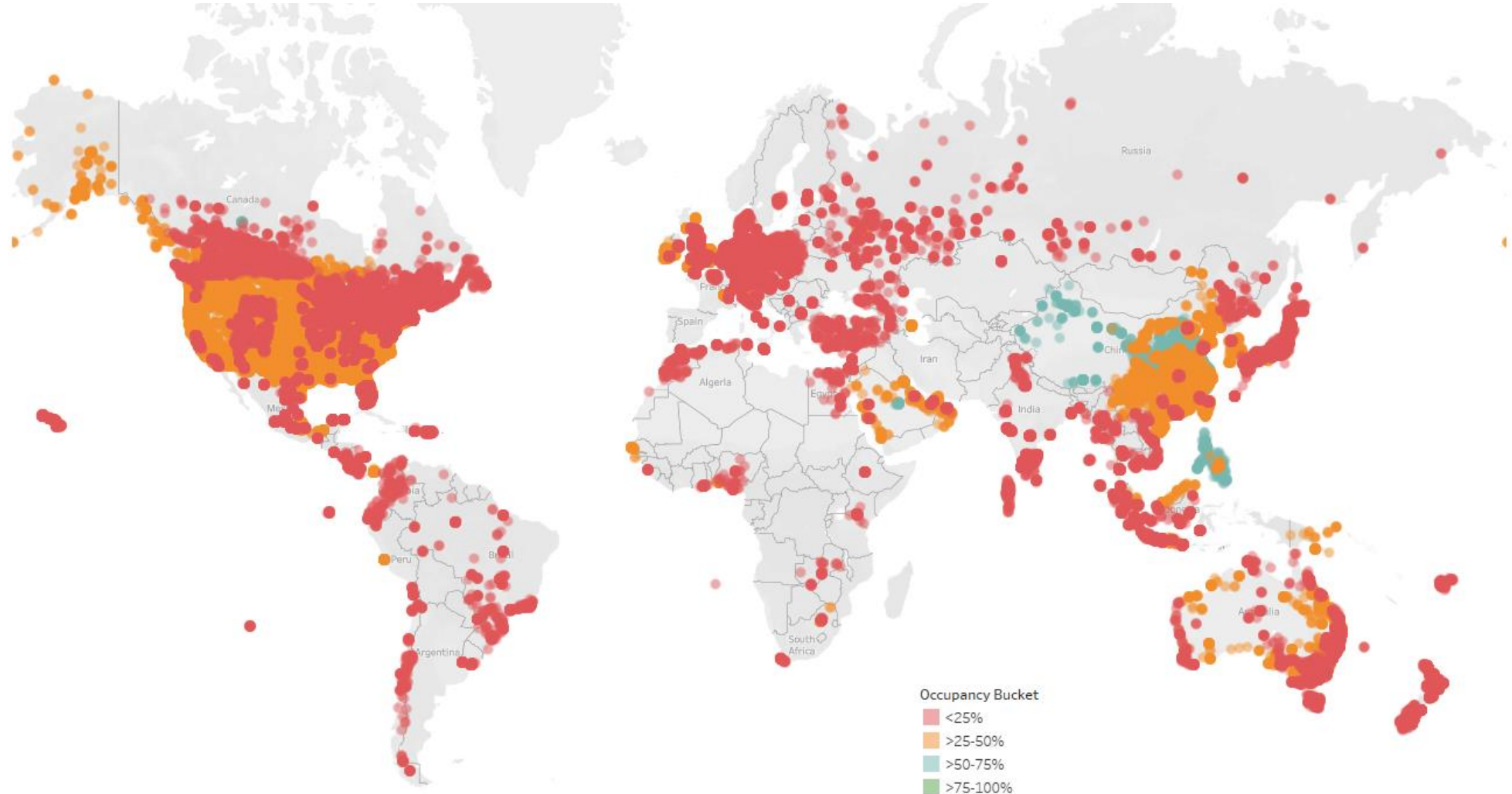
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Where is
the world
in the
recovery
cycle?

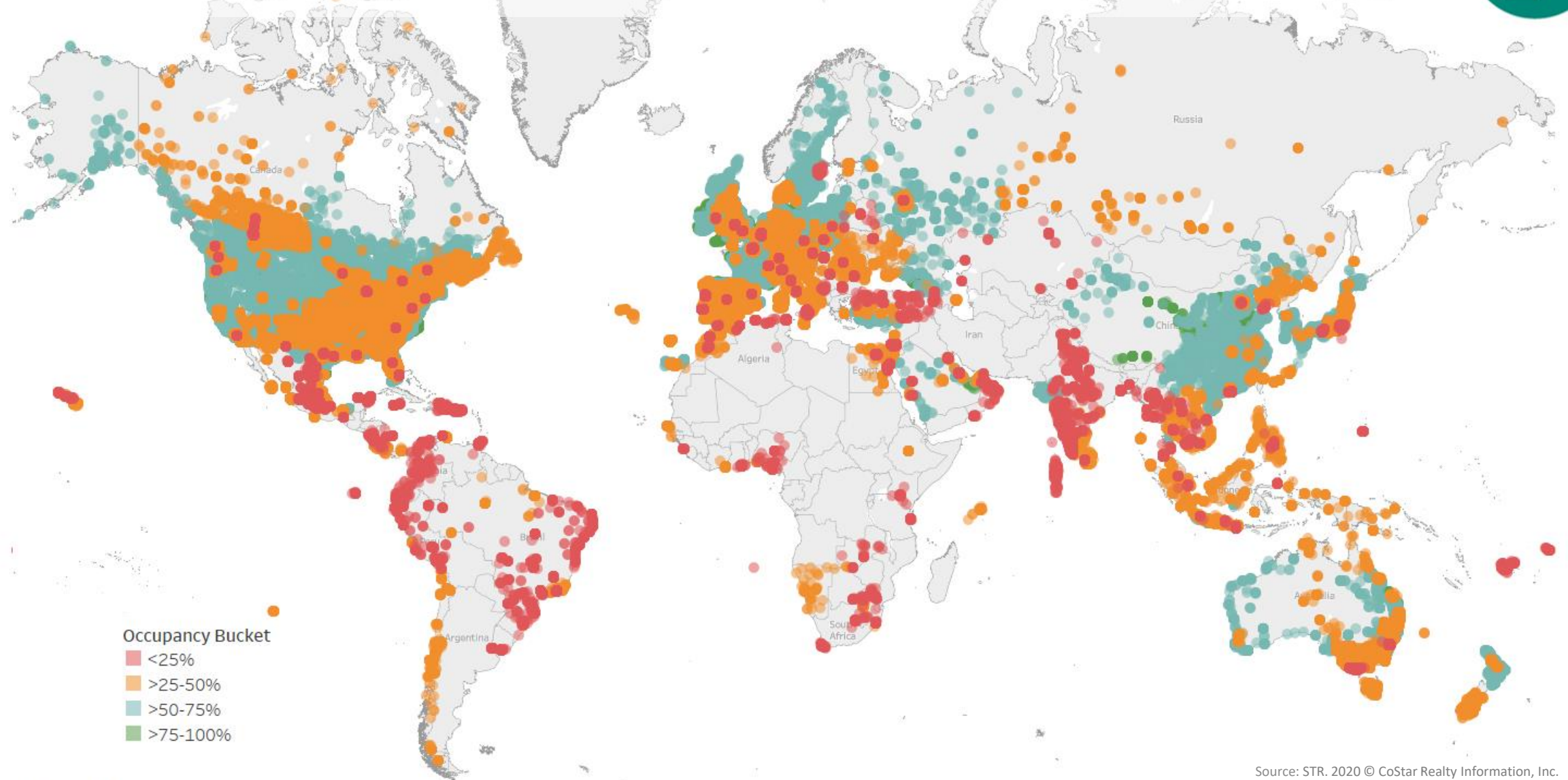
What are the occupancies of the hotels still open?

Occupancy Rolling 28 days until 16 May 2020, STR Submarkets



August starts much stronger for many markets around the world

Occupancy of STR sub-markets (reporting methodology). Rolling 7 days to 01 August 2020



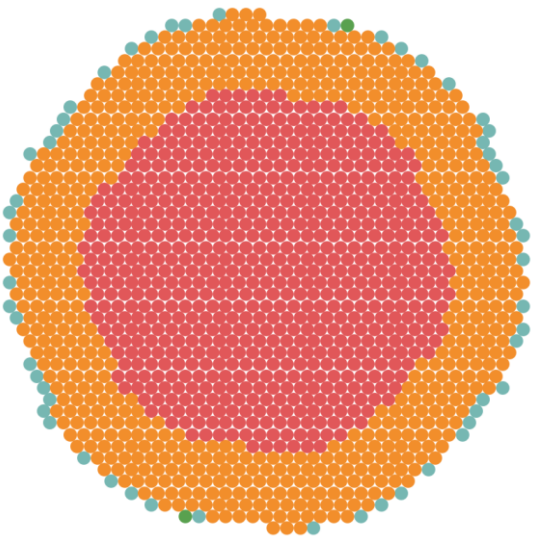
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We're a long way from May and continuing to get better

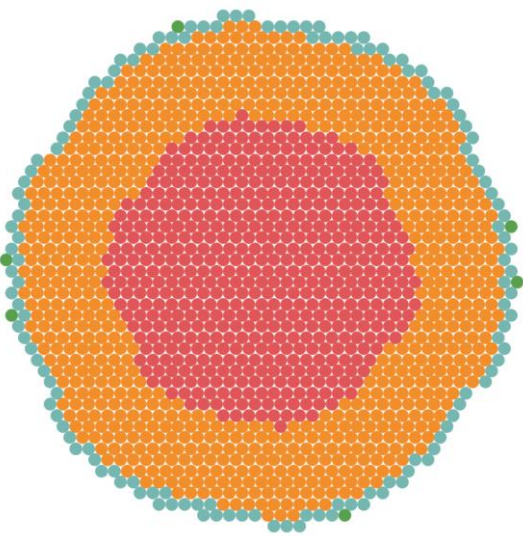
Sub-Markets, Occupancy actuals 25% buckets. Rolling 7 days



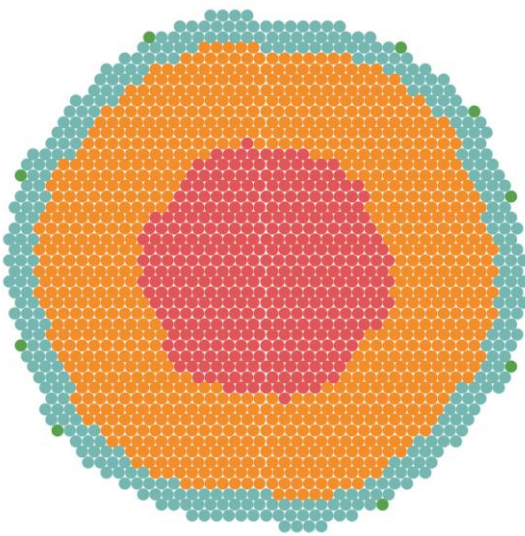
R7 until 02 May



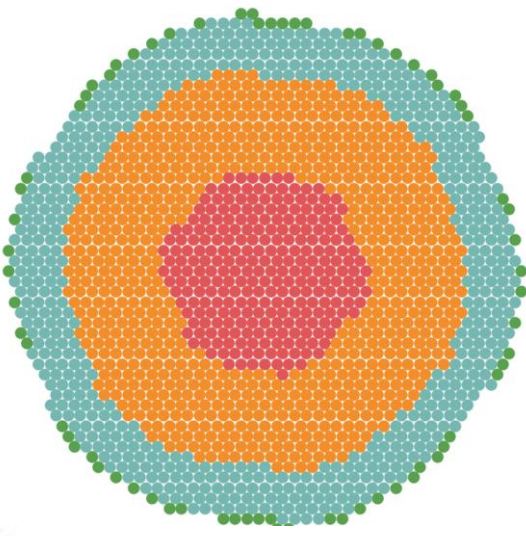
R7 until 30 May



R7 until 04 July

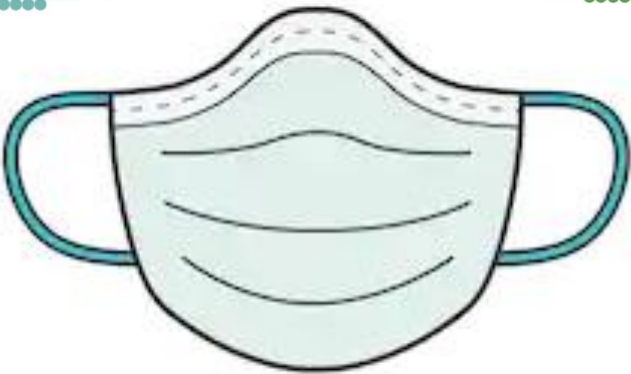


R7 until 01 August



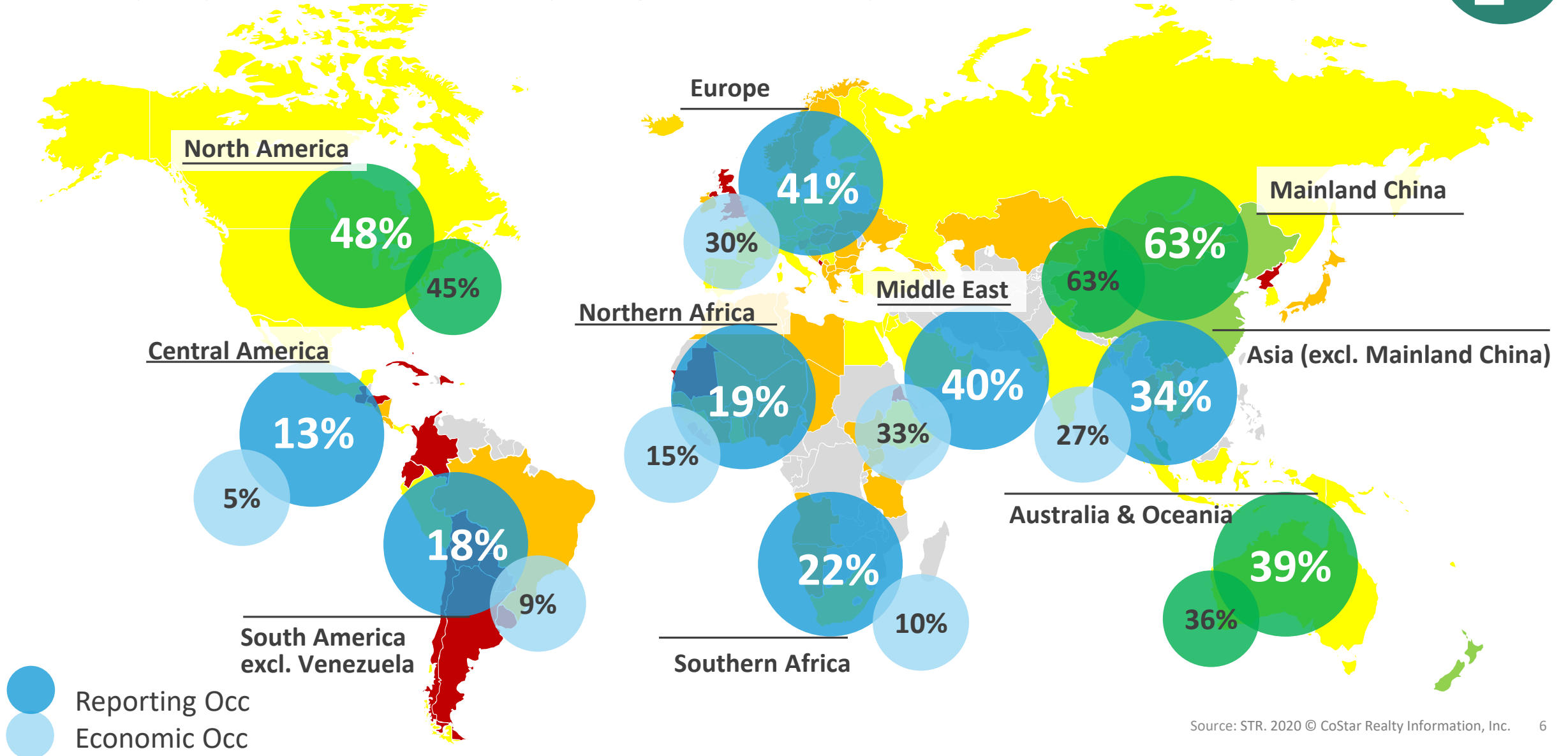
Occupancy

- <25%
- >25-50%
- >50-75%
- >75-100%



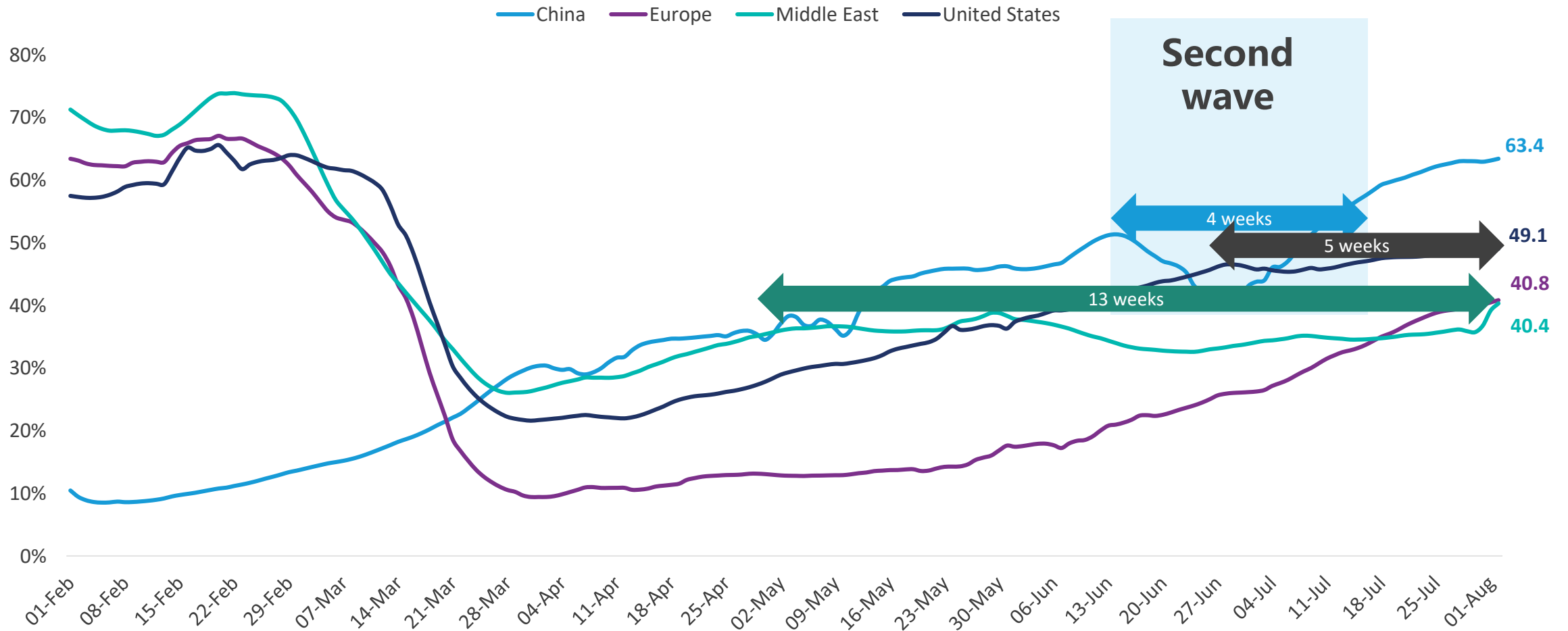
China leading the way - a benchmark most would be happy with

Occupancy actuals, open hotels (reporting) & full inventory (economic), Week ending August 2nd



China bounces back, US stalls, ME stuck at 40%, Europe recovering

Absolute Rolling 7 days Occ % of (reporting methodology) to the August 2nd 2020

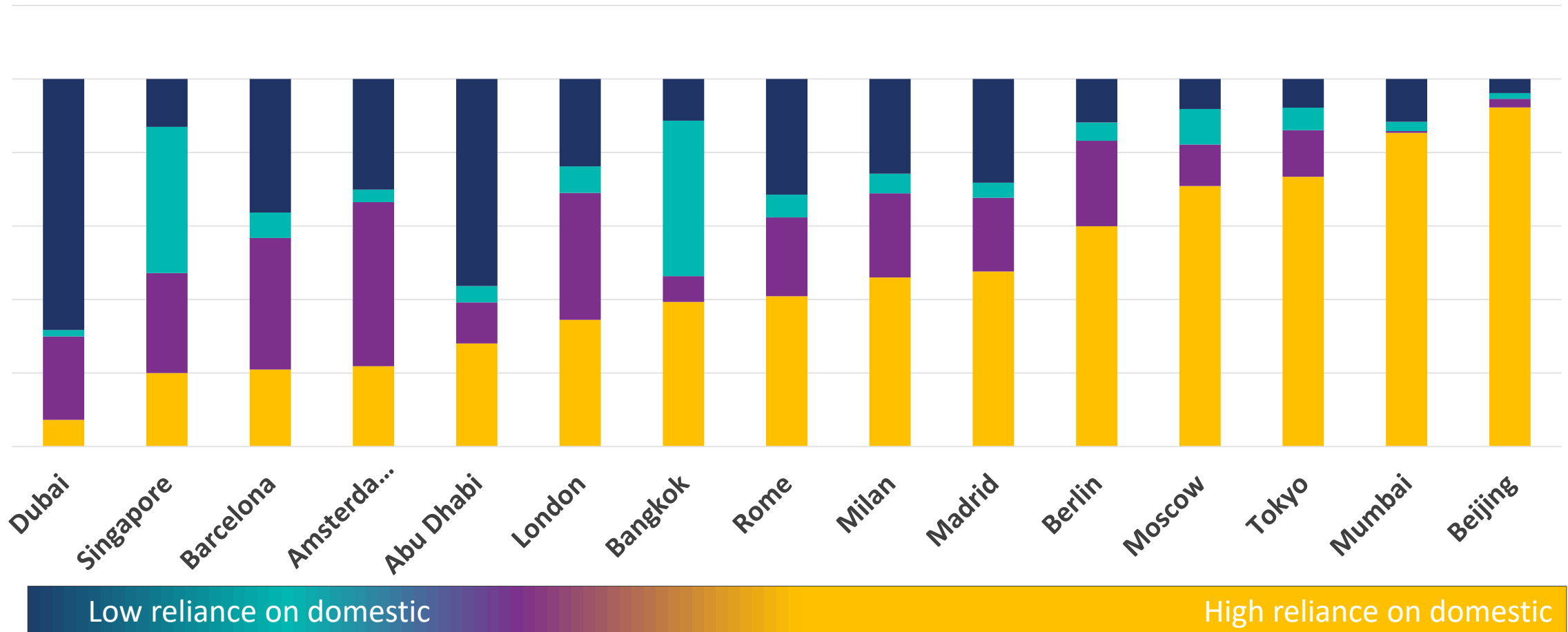


#3 Phased Recovery

Short-haul and domestic markets to recover quicker than highly International markets



Domestic Short-haul Medium-haul Long-haul



The Middle East

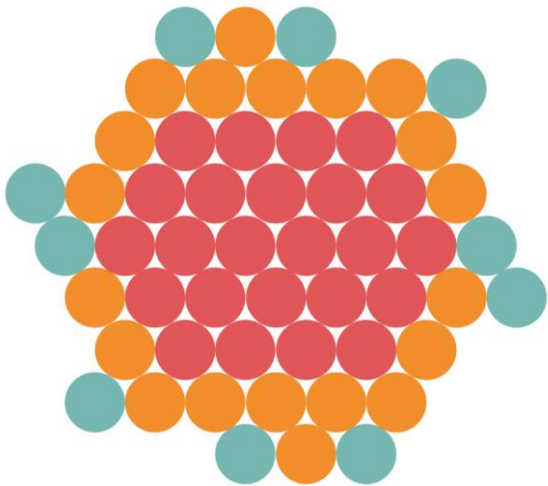


MEA Recovery

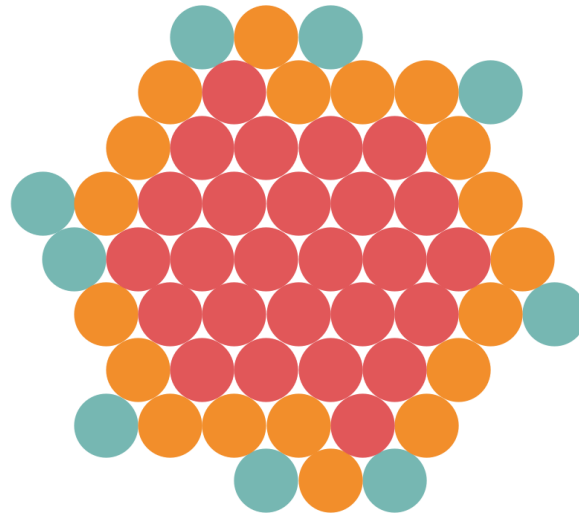
Sub-Markets, Occupancy actuals 25% buckets. Rolling 7 days



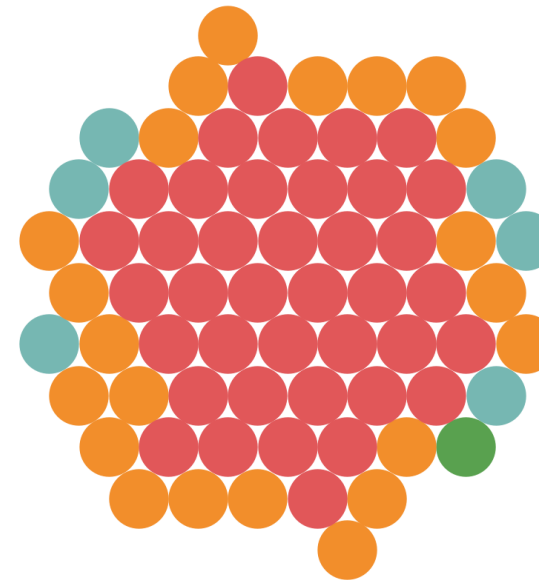
R7 until 09 May



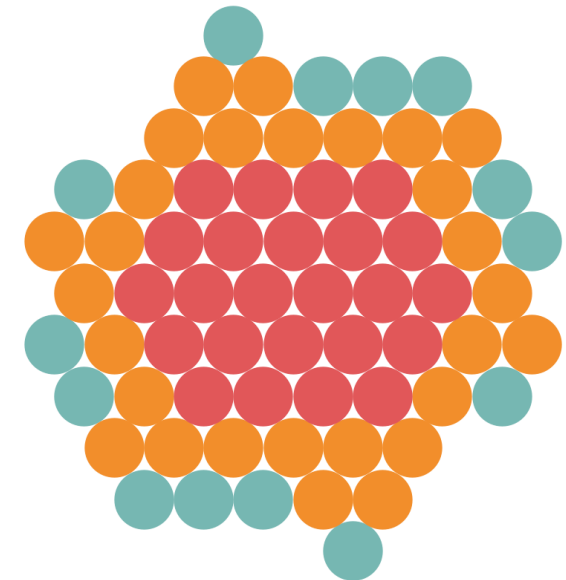
R7 until 06 June



R7 until 11 July



R7 until 08 August



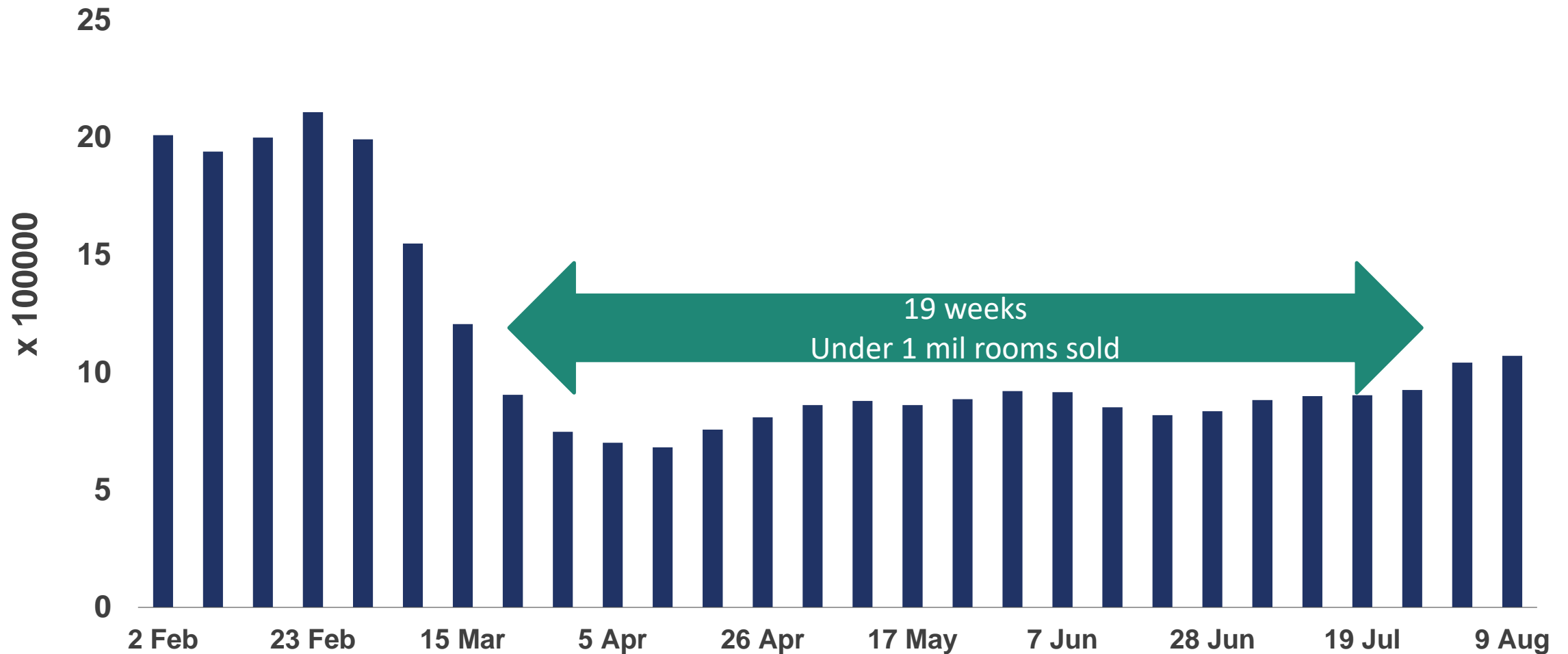
Occupancy Bucket

- <25%
- >25-50%
- >50-75%
- >75-100%

Middle East - Room Demand stagnates but finally breaks up in August



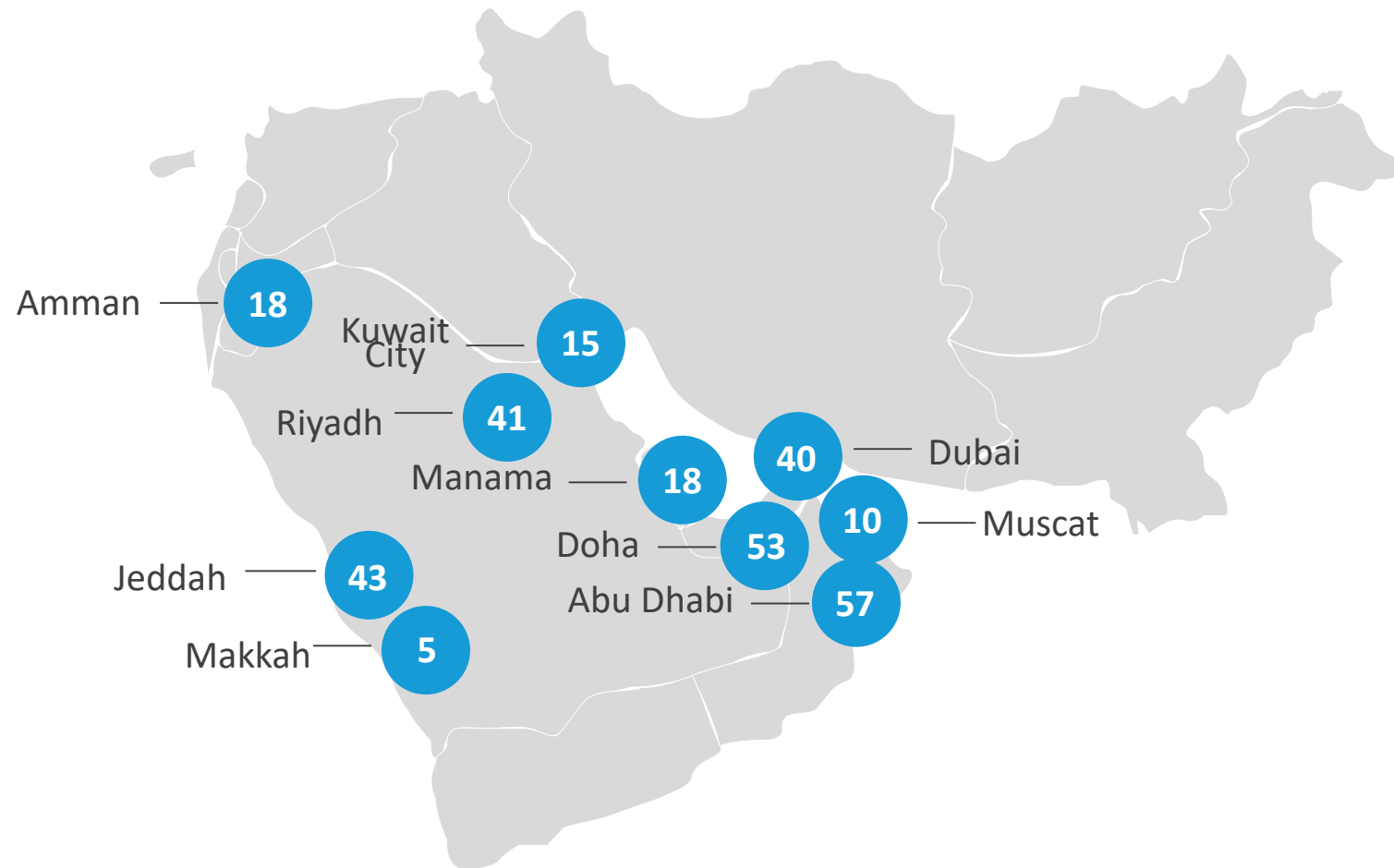
Total actual demand by Week



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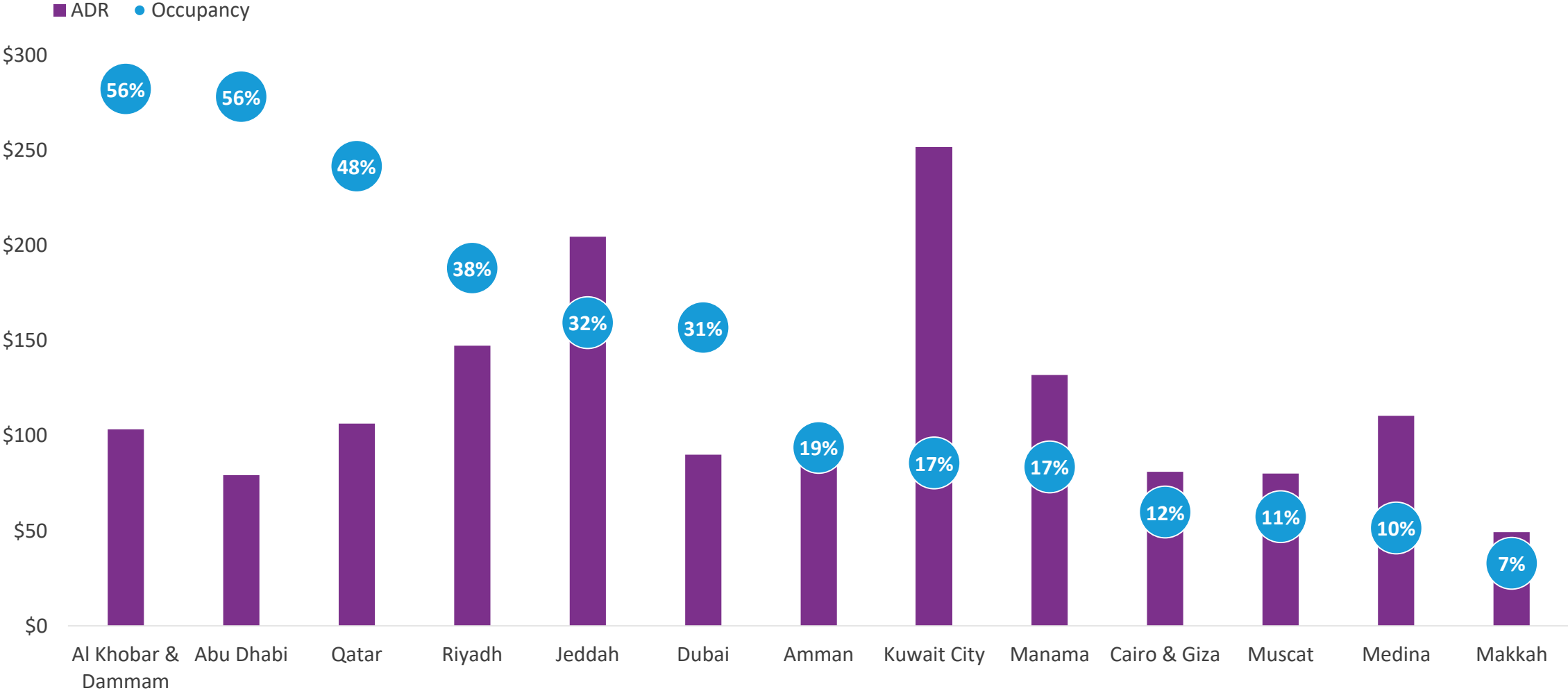
Occupancy ranges from 5% to 57%

Week ending 9th Aug 2020, Occupancy vs same week last year



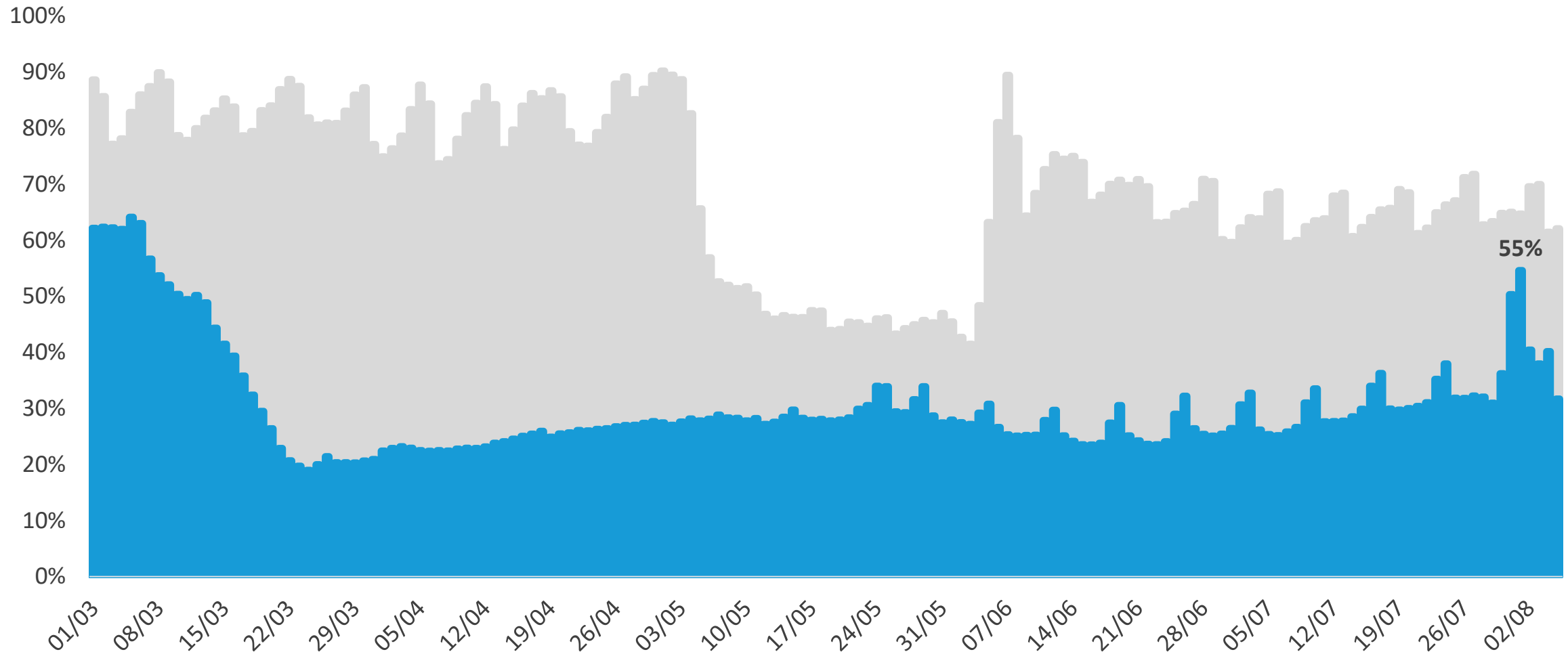
GCC Markets Occ, ADR

July 2020, USD



Dubai Occupancy spikes during Eid al-Adha weekend

Daily Data, Mar to Aug –2020 vs 2019



The sun always shines in the desert

July 2020 v July 2019 in AED



Desert Hotels UAE

Occupancy

51%

+36.8%

ADR

1190

+20.2%

RevPAR

608

+64.6%



Thank You



HOTEL DATA
CONFERENCE
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