The 2021 Stakeholder Conference

Tuesday 3rd February 2021

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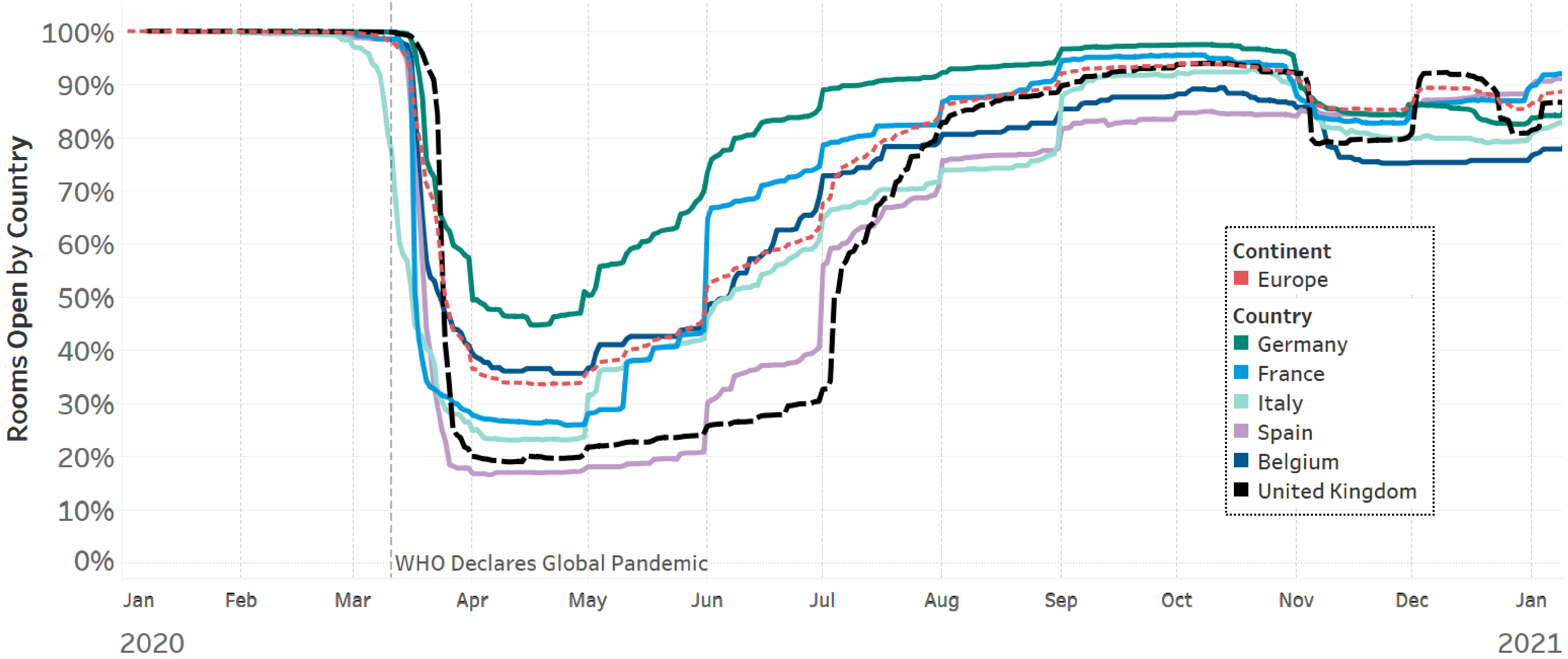
Could 2021 signal a
New Beginning?


Hold on to
your seats!!!

Global performance

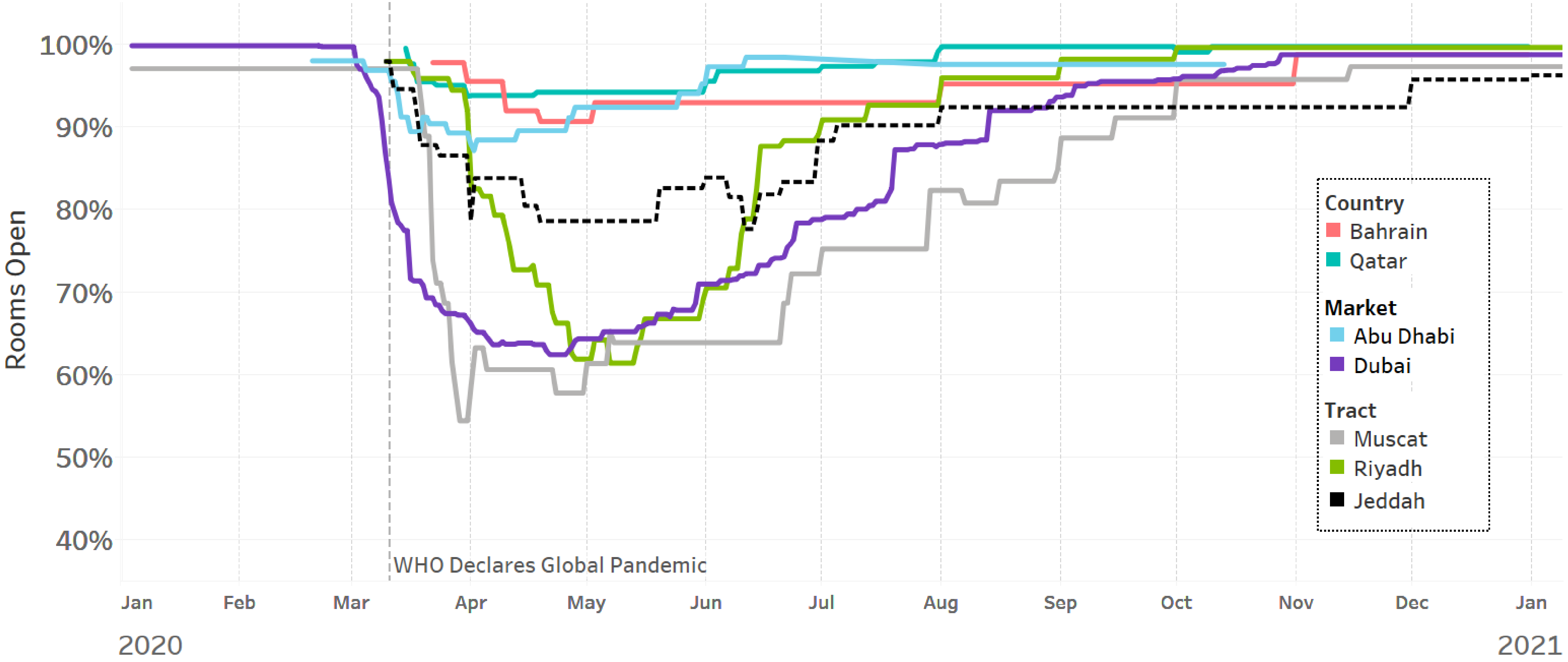
90% European hotels open by October… now back to 80%

European hotel rooms open by country – STR reporting sample



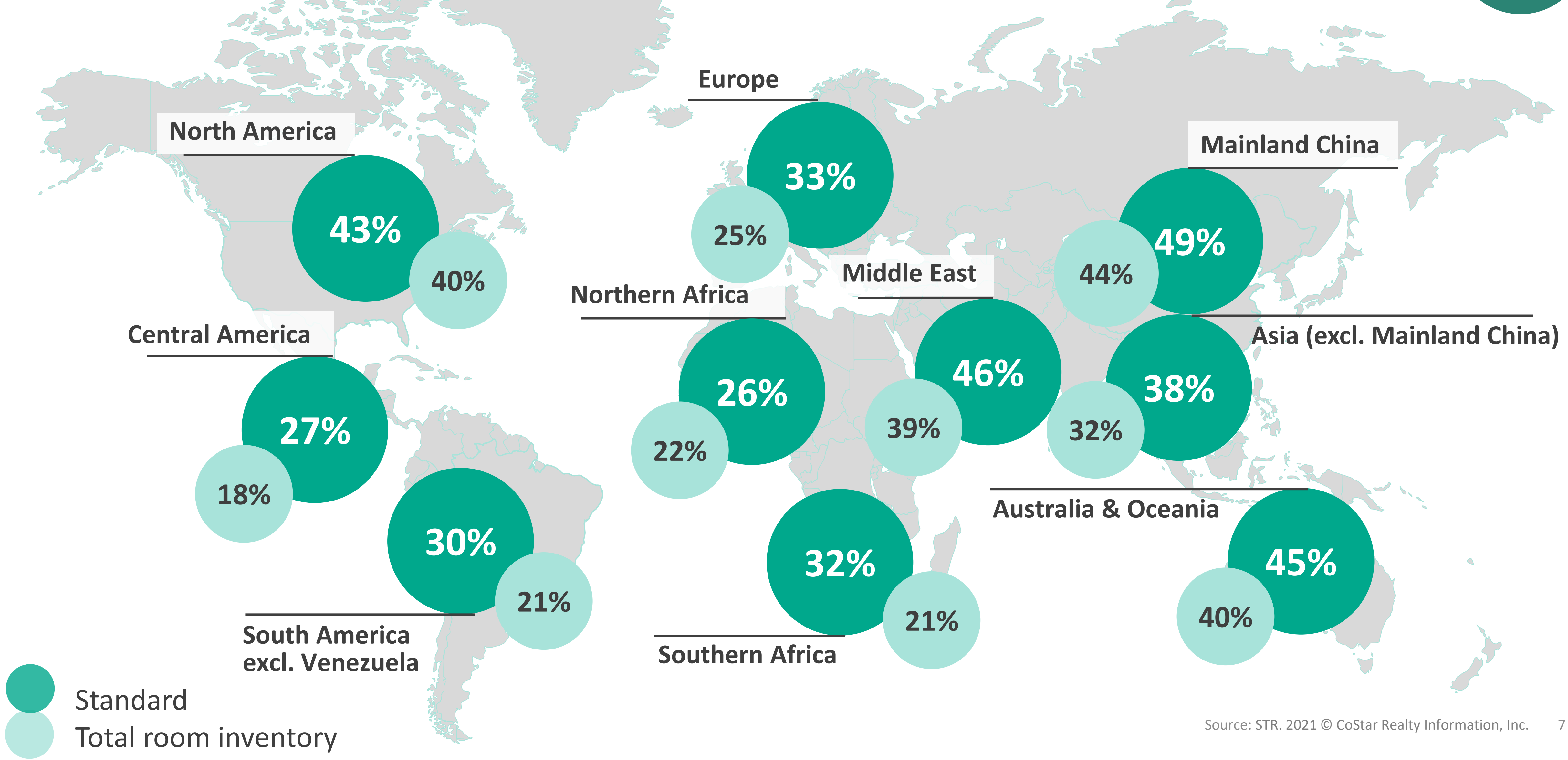
95% Middle East hotels open and staying open

Middle East hotel rooms open by country/market – STR reporting sample



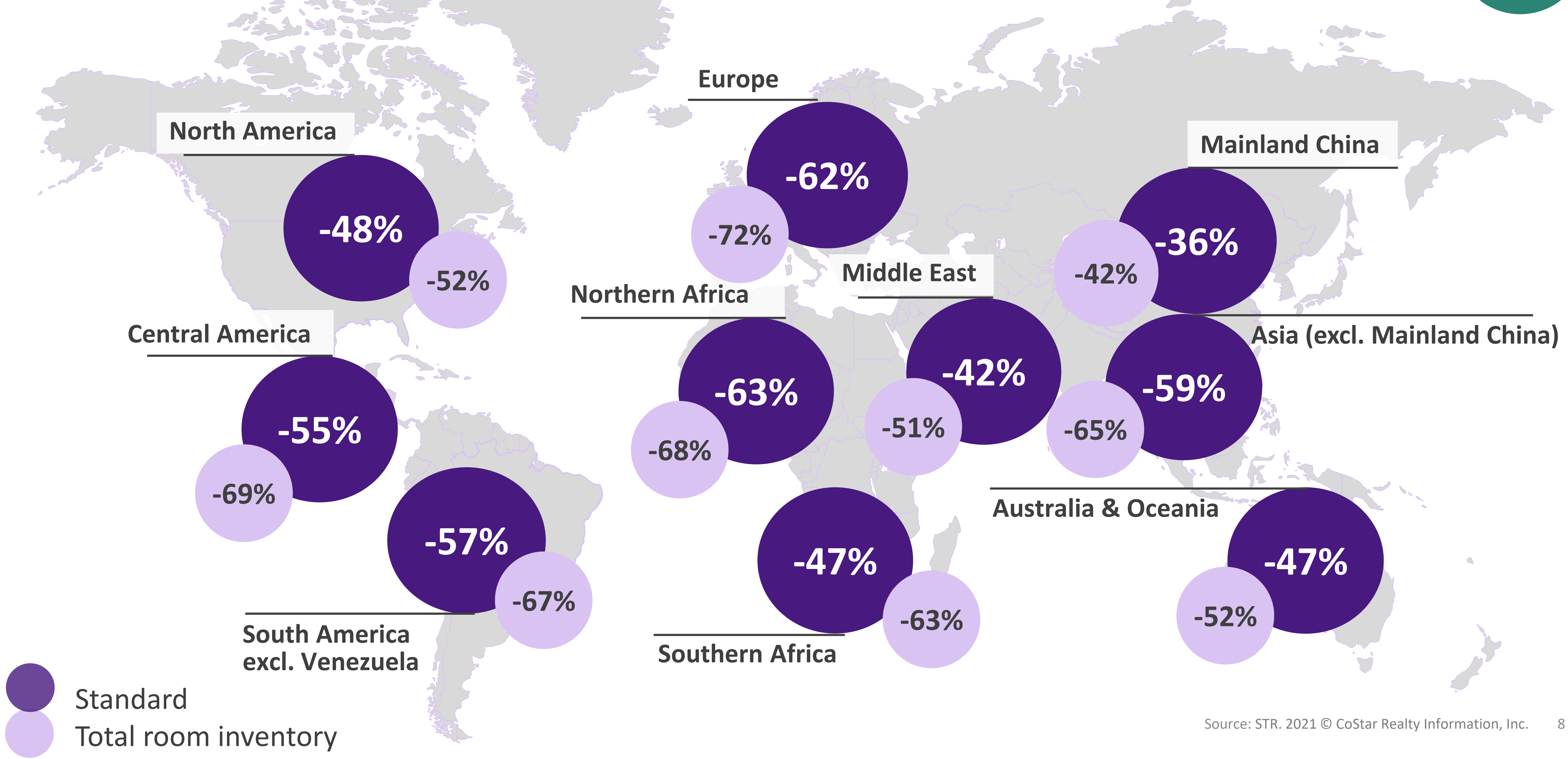
Full year TRI occupancies by region range from 18% to 44%

Occupancy actuals, open hotels (standard) & total room inventory (TRI), Full Year 2020



2020 TRI RevPAR down > 50% most places, Europe down 72%

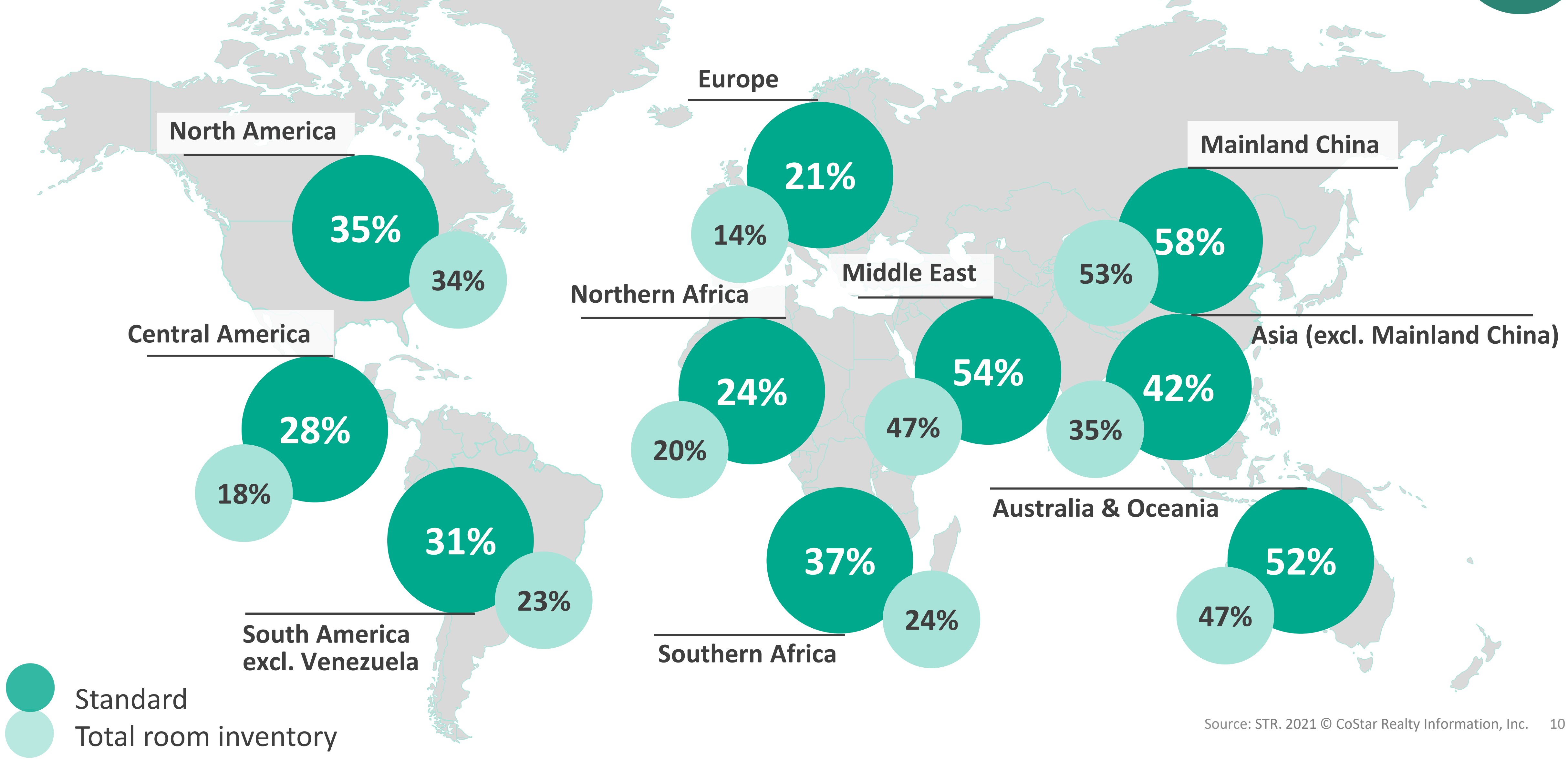
RevPAR % Change, CC, USD, open hotels (standard) & total room inventory (TRI), Full Year 2020



Don't panic

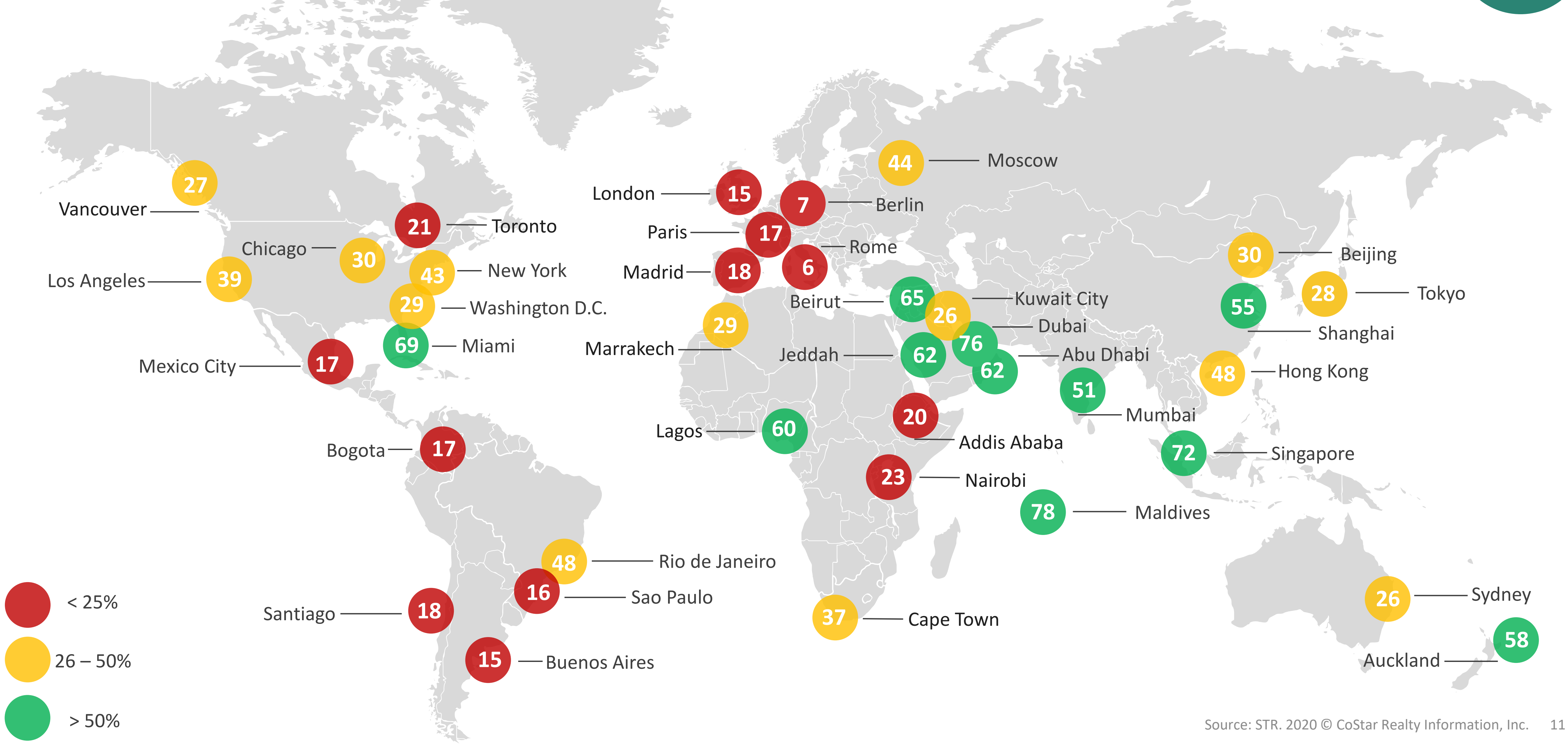
Many regions of the world doing much better than Mar/Apr 20

Occupancy actuals, open hotels (standard) & total room inventory (TRI), December 2020



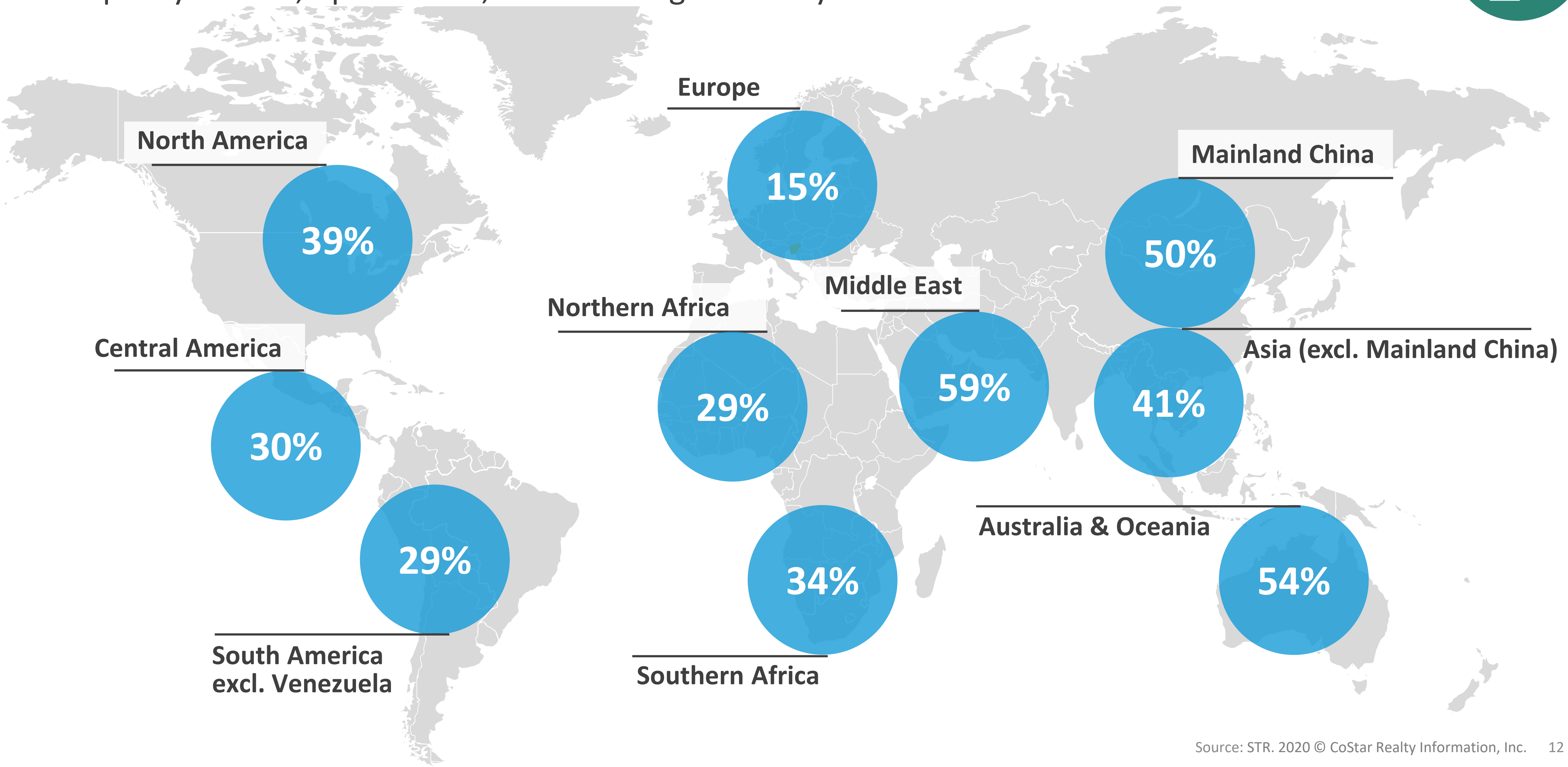
Lockdown 2.0 cancels Christmas/NY holidays. Not everywhere…

Occupancy actuals, all hotels (total room inventory), Week ending 3 January 2021



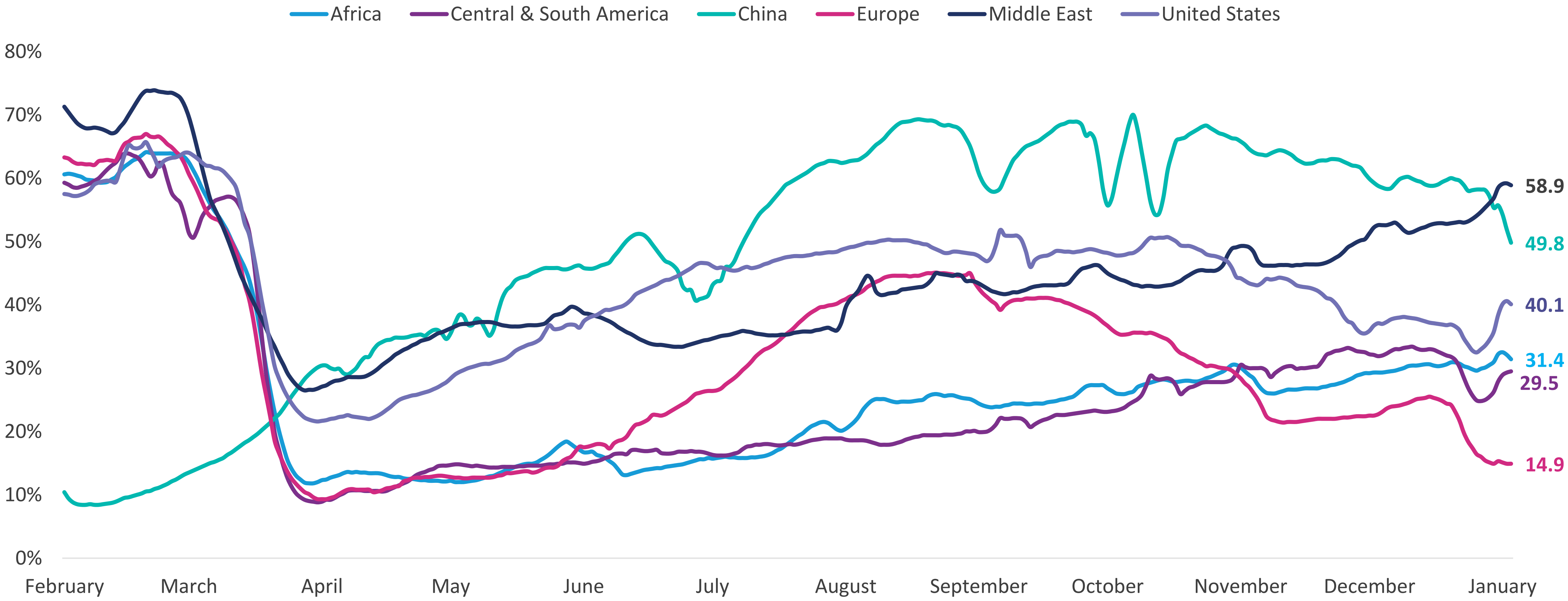
Middle East leads the way - a benchmark most would be happy with

Occupancy actuals, open hotels, Week ending 3 January 2021



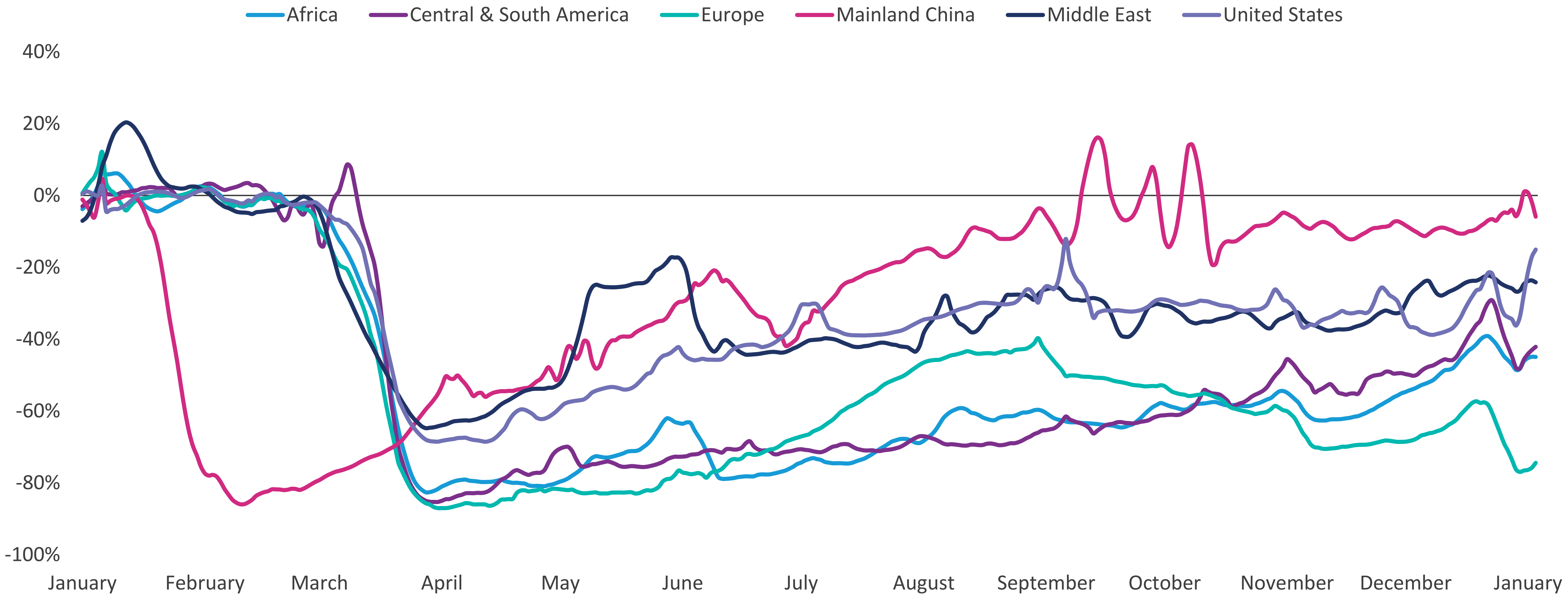
The new normal? Middle East tops global occupancy charts

Absolute Rolling 7 days Occ % to 3 January 2021



China almost back to pre-Covid levels

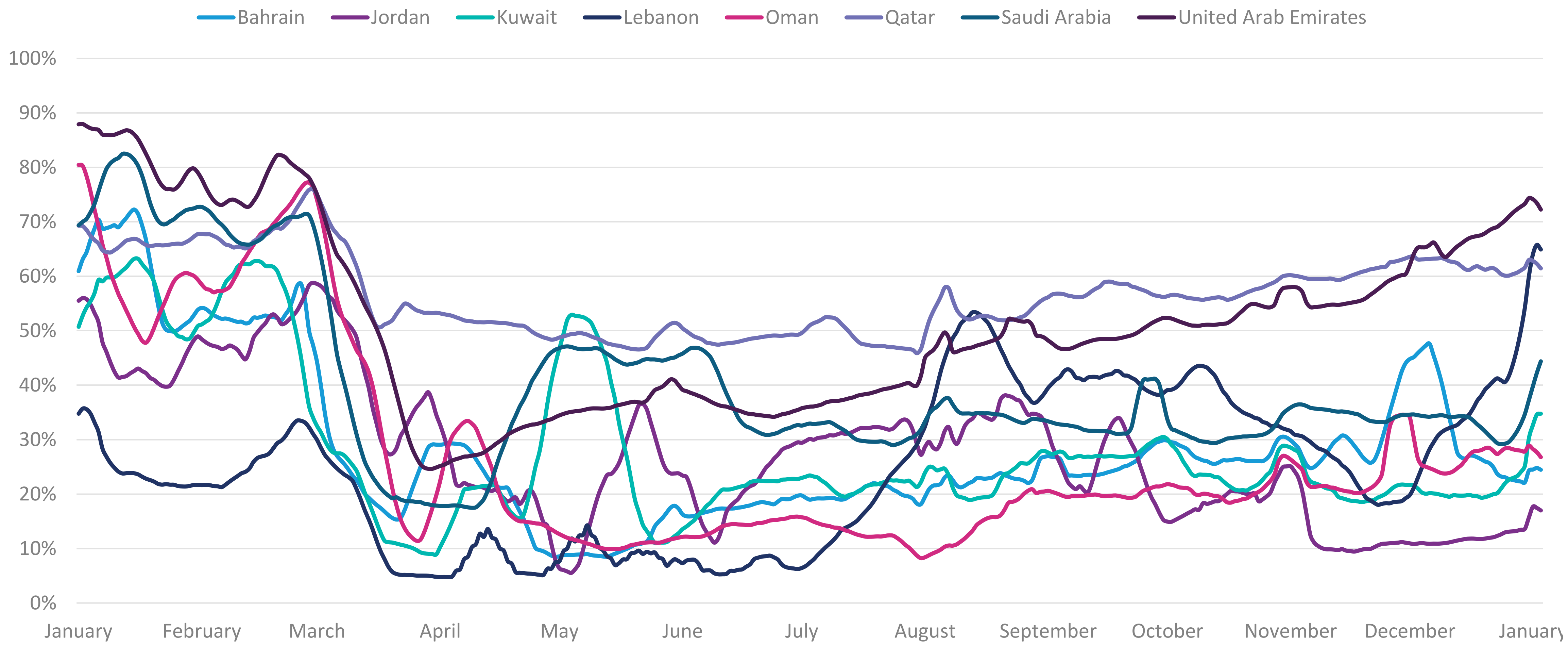
Rolling 7 days Occ % change, January 1st 2020 to 3rd January 2021



Middle East

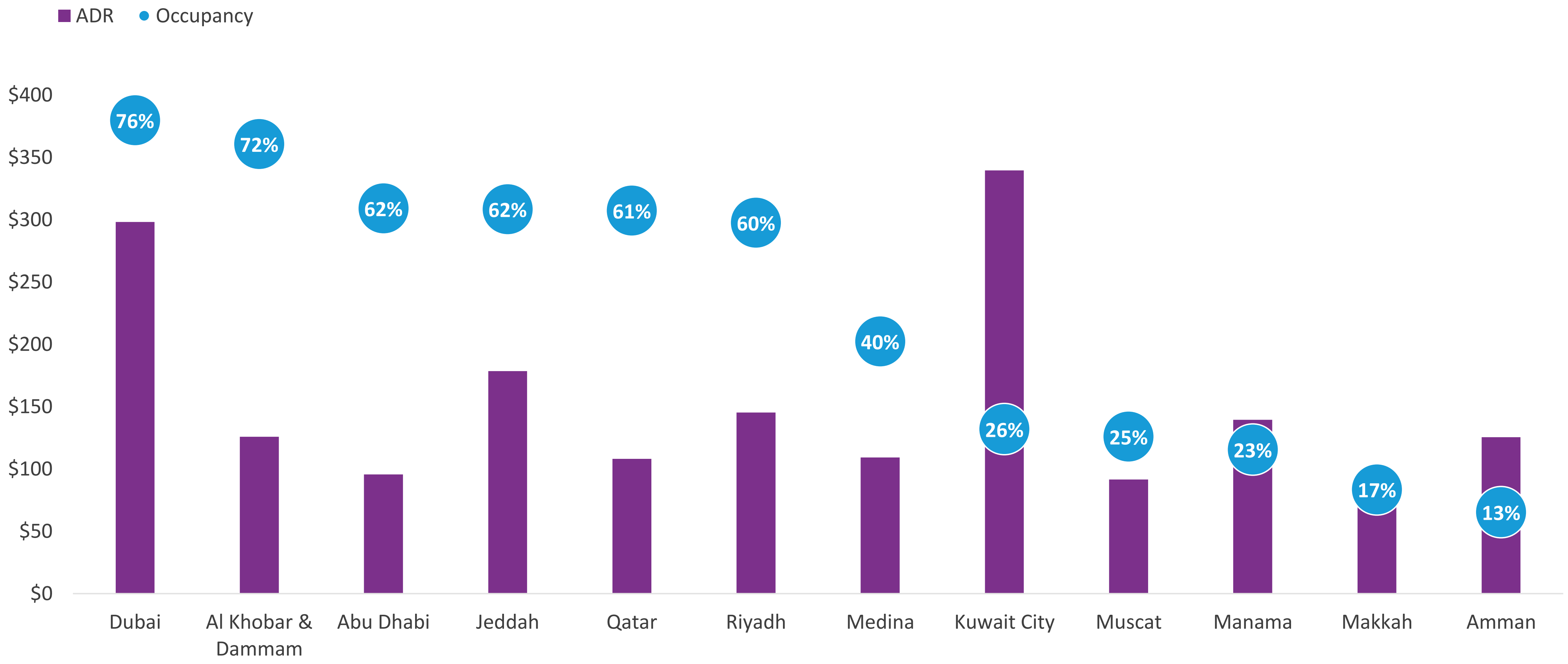
Geographically close but a dozen different roads to recovery

Middle East, Rolling 7 days occupancy (standard), 1 Jan 2020 – 3 Jan 2021



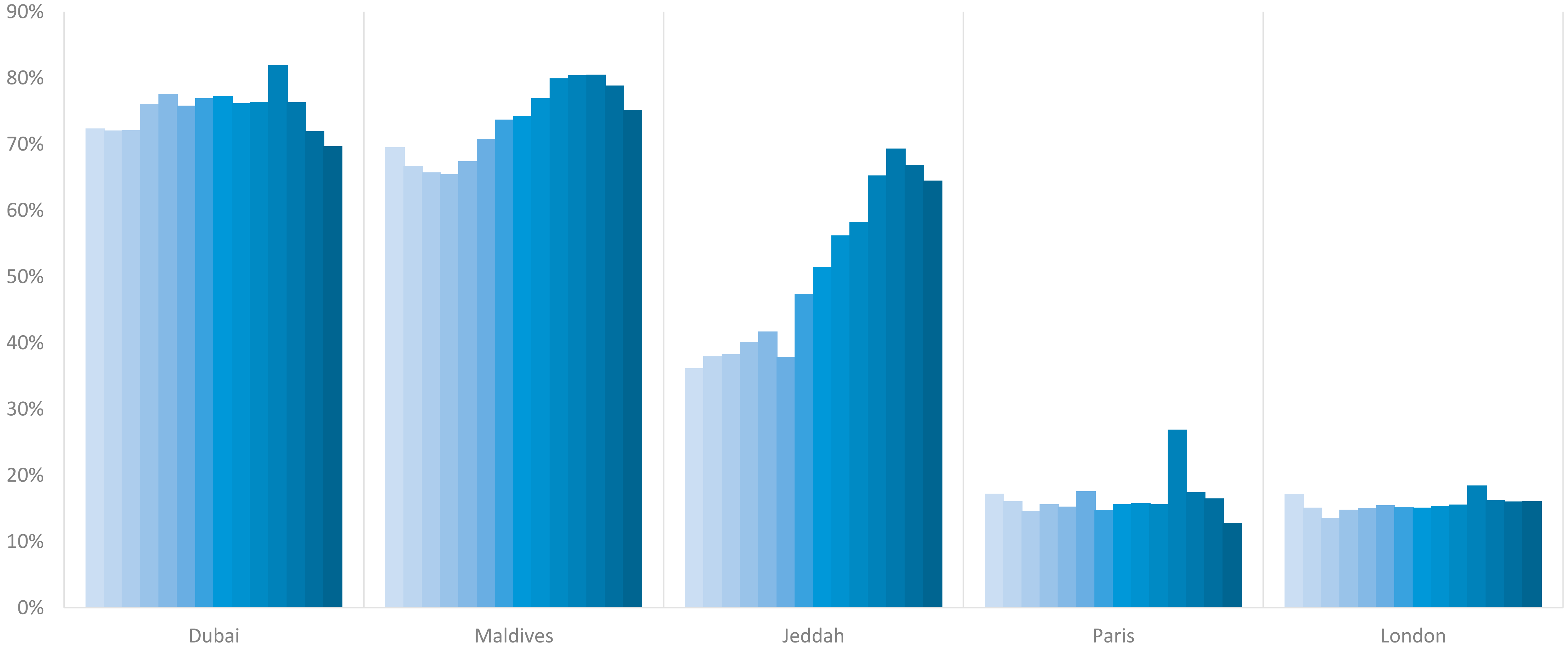
New Year drives occupancy across Middle East markets

Week ending 3 Jan 2021, Occupancy (standard) & ADR, USD



Holiday Season Occupancy

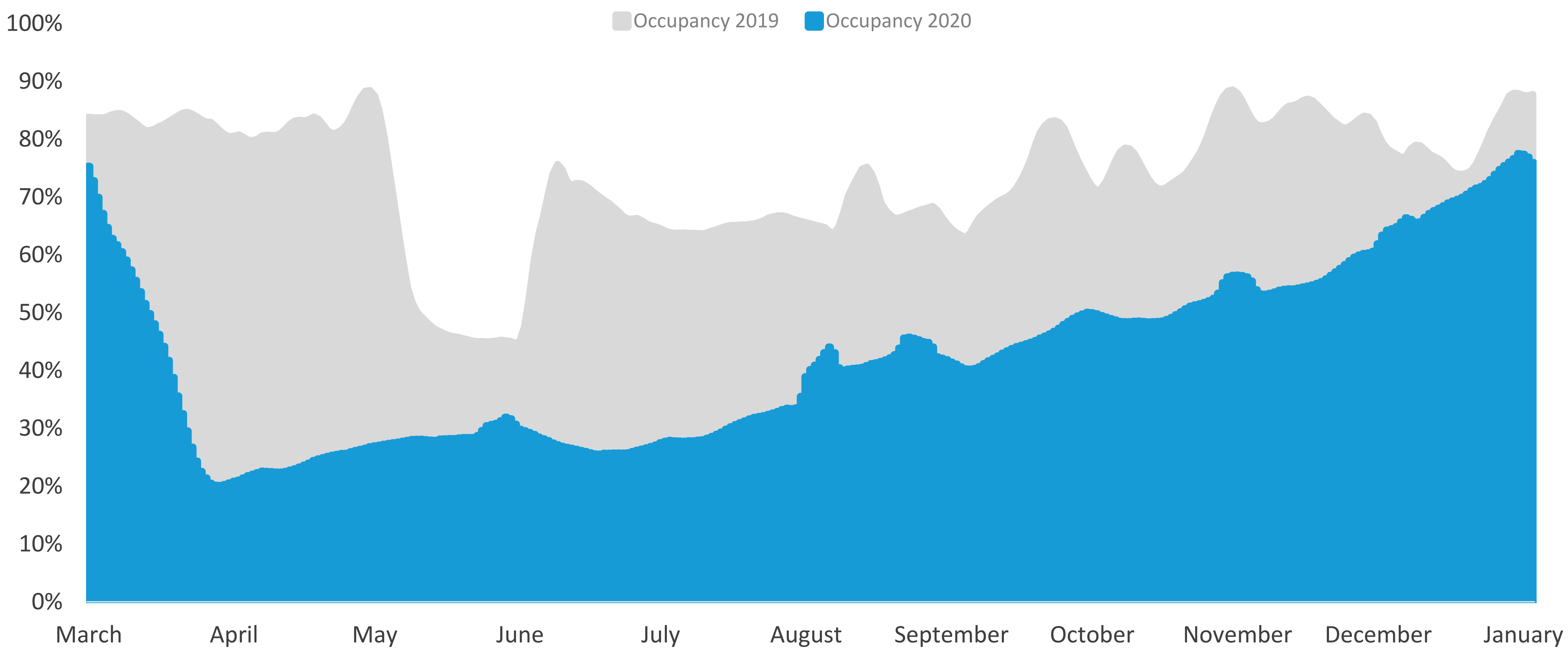
Absolute occupancy levels, 21 December 2020 to 3 January 2021



Dubai

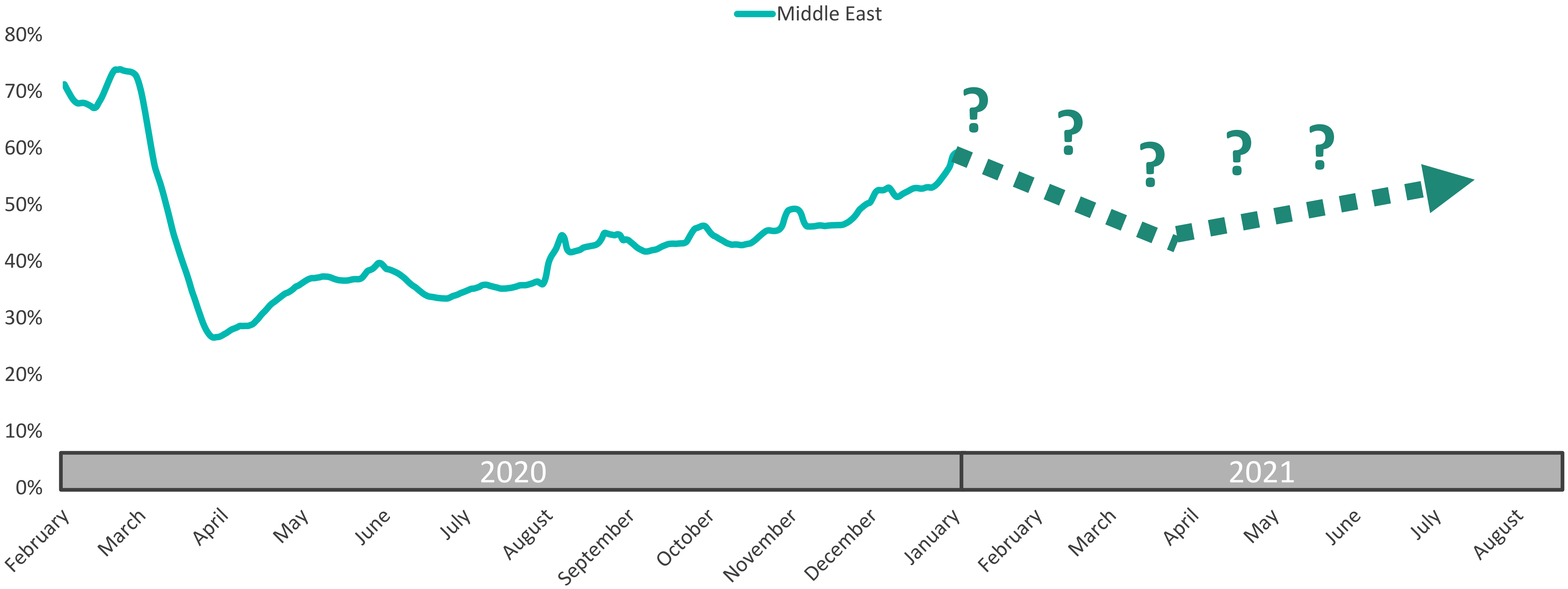
Dubai occupancy catching up

Rolling 7 days occupancy (standard), March to December – 2020 vs 2019



Recovery to continue into Q1 2021

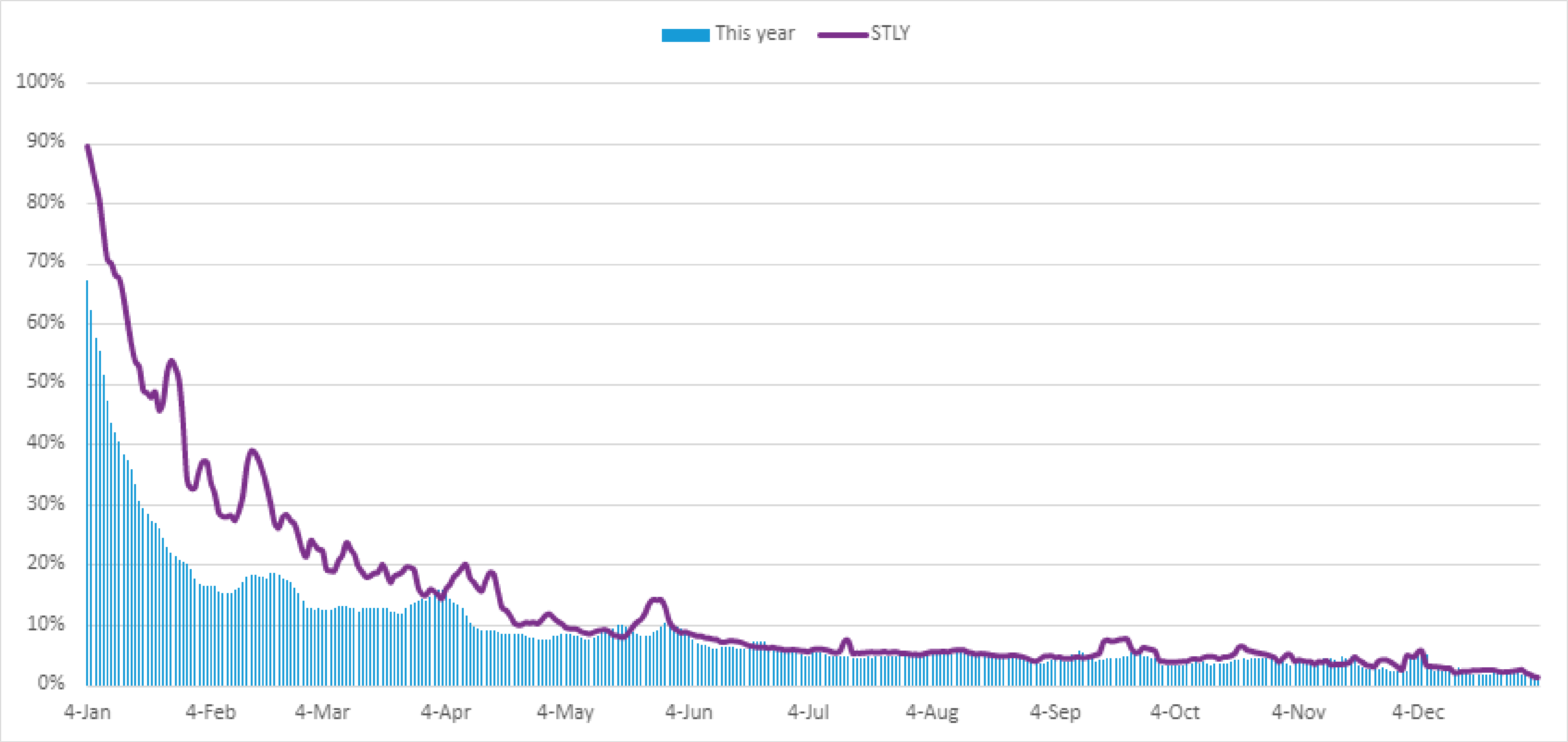
Rolling 7 days Occ (standard) % to 3 Jan 2021 – scenario thereafter is not official forecast



Source: STR. 2020 © CoStar Realty Information, Inc.

Dubai Occupancy on the books closely tracking 2019

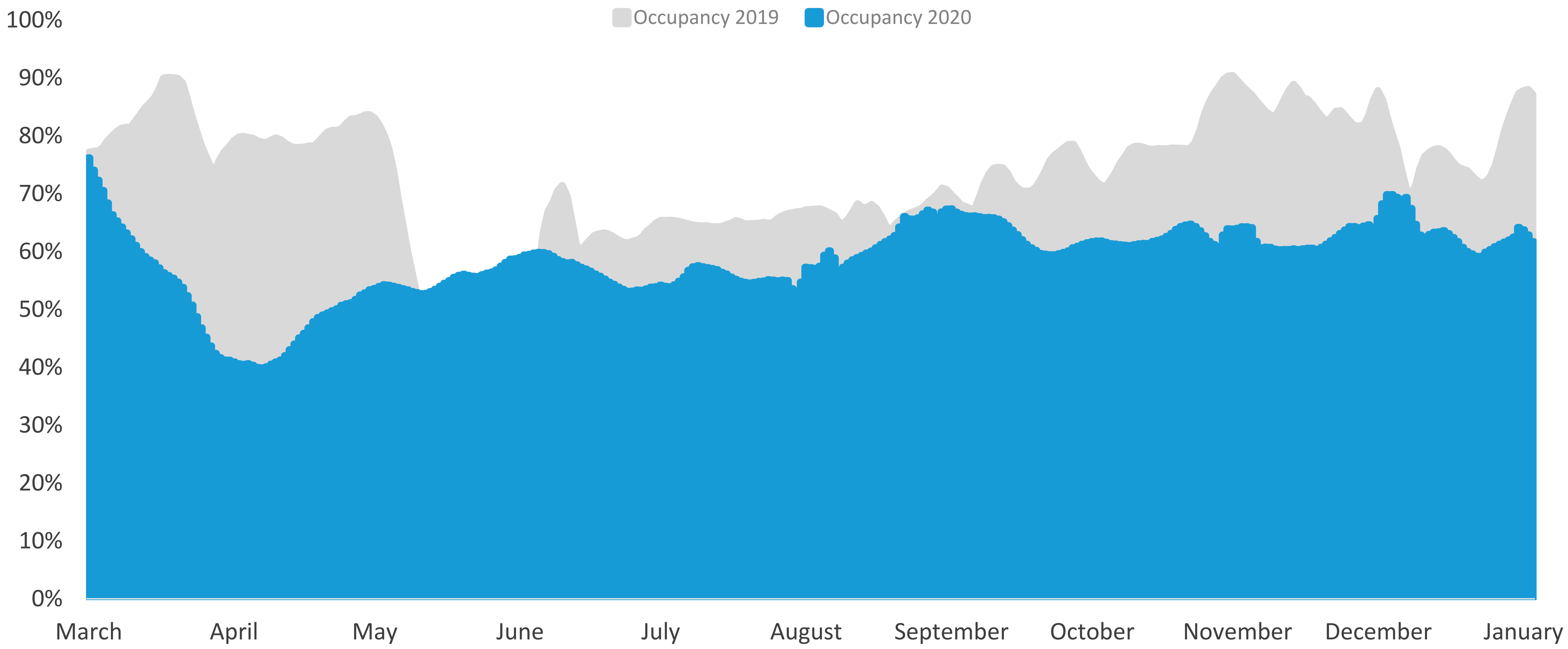
As at 04 January 2021



Abu Dhabi

Abu Dhabi occupancy stable but Q4 challenging

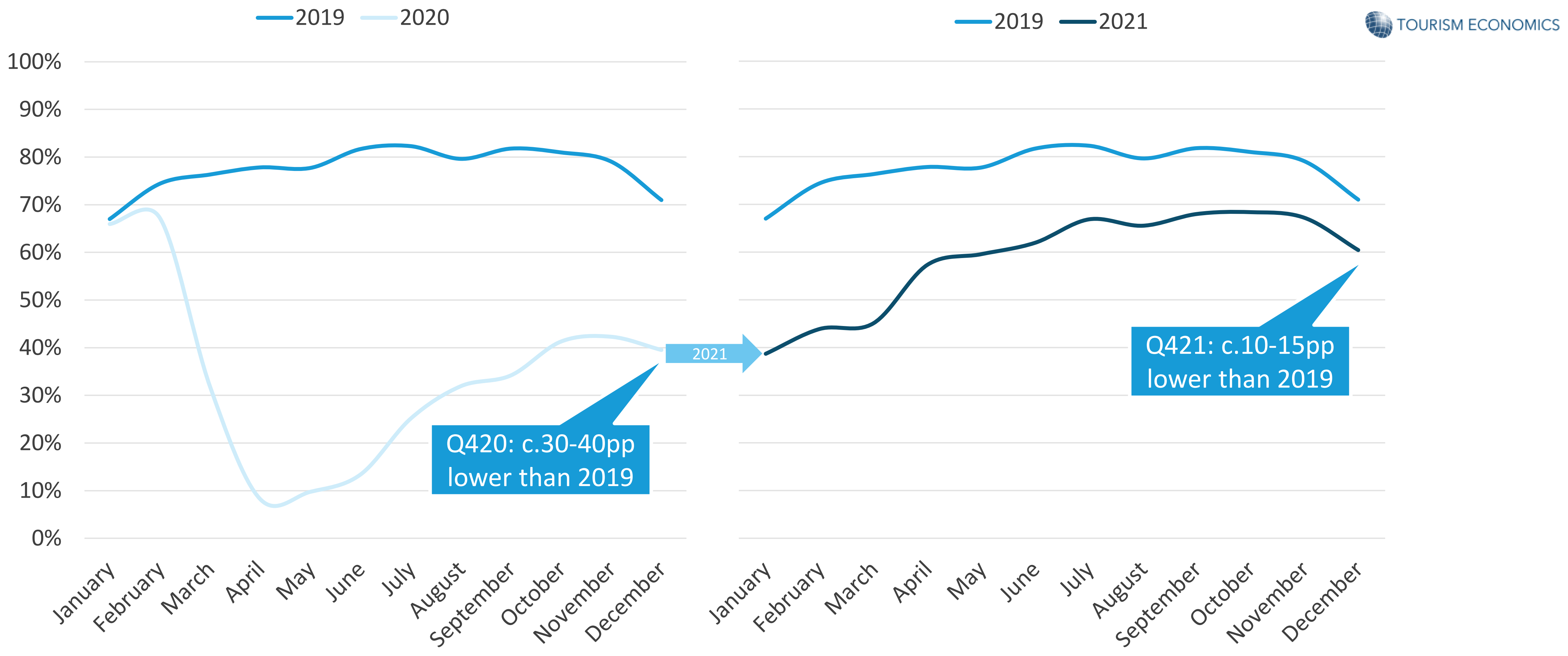
Rolling 7 days occupancy (standard), March to December – 2020 vs 2019



What about Recovery!!

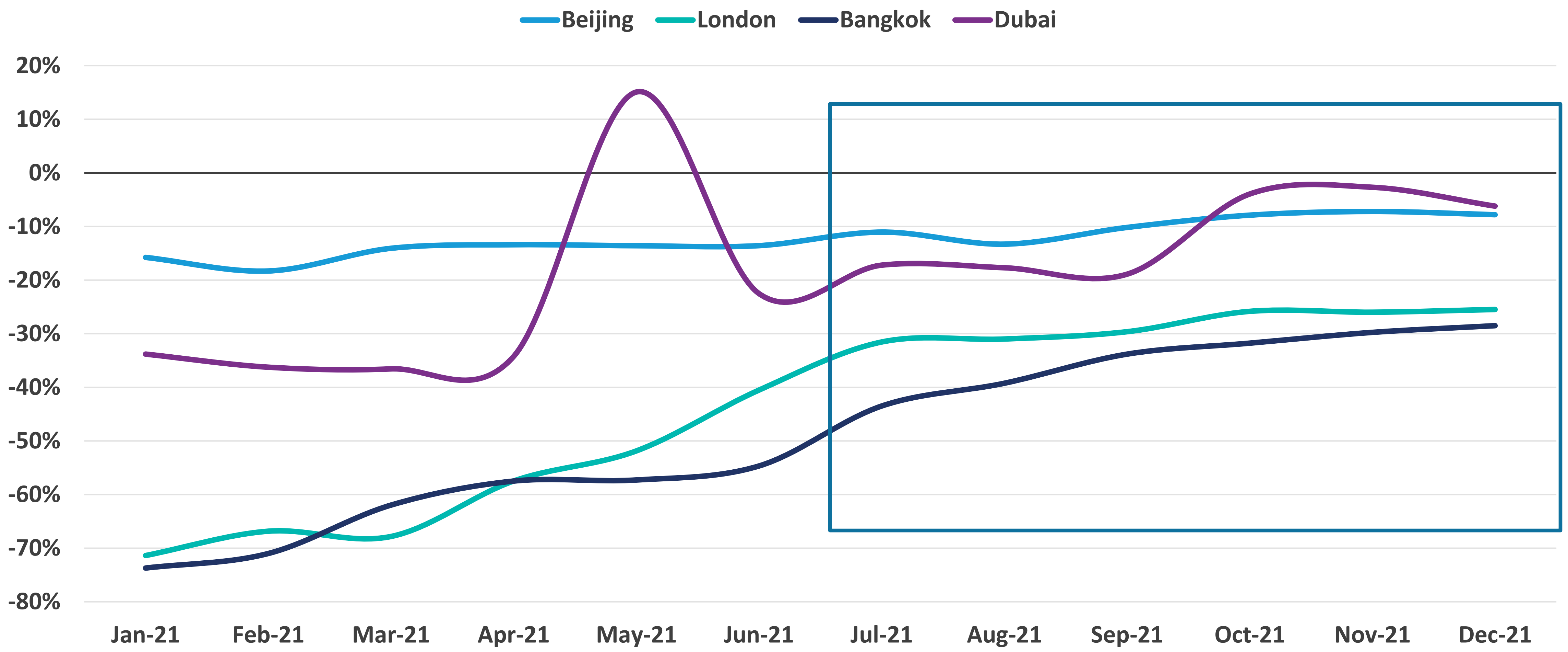
We expect recovery from Q2 onwards

All Market Forecasts excl. China, Occupancy, 2020 & 2021 vs 2019



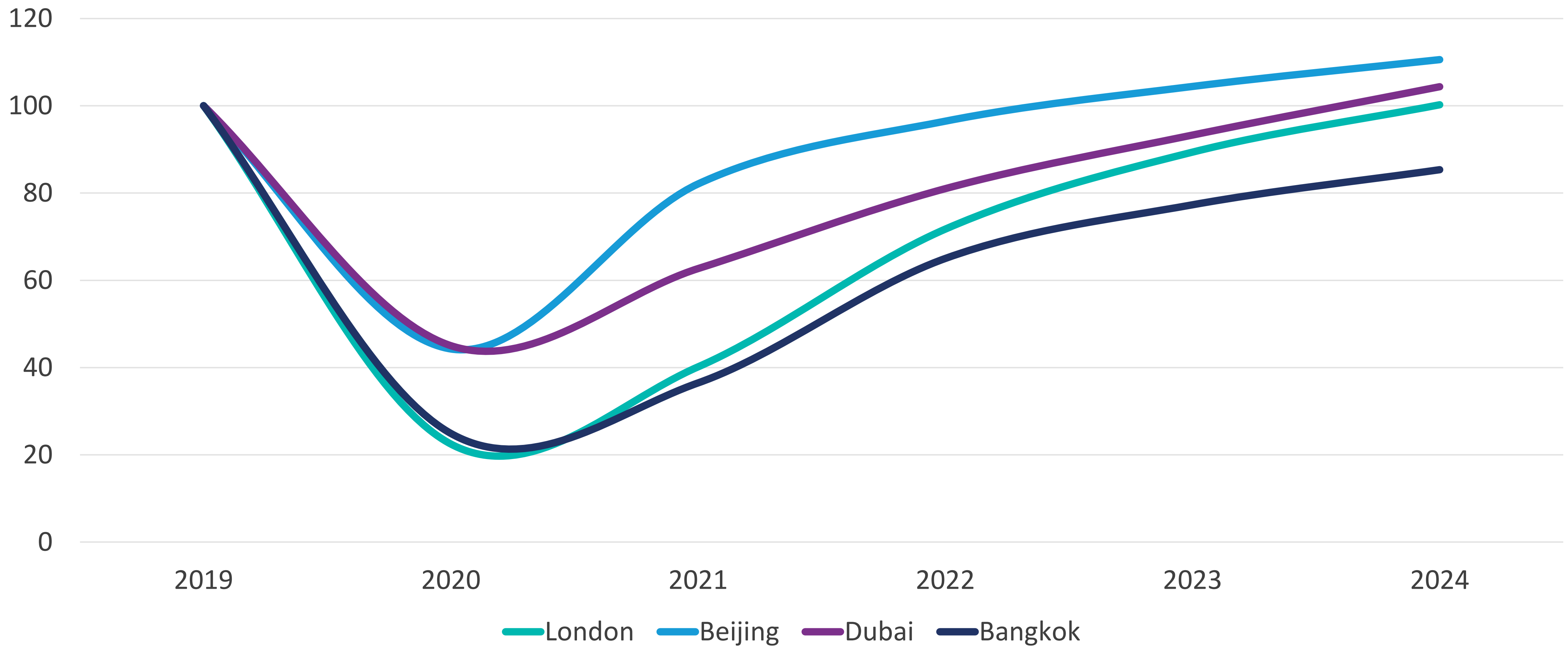
It will differ by region in the short term

Demand % Change vs 2019, Beijing, London, Bangkok and Dubai



3 markets out of 4 recovering by 2024

RevPAR Indexed to 2019, London, Beijing, Dubai and Singapore



Saudi Arabia

Iran
Isfahan
Yazd
Al Hillah
Kut
Al Qadisiyah
Amarah
Ahvaz
Nasiriyah
Al Salman
Basra
Yasuj
Kerman
Shiraz
Bushehr
Kuwait
Israel
Gaza Strip
Jordan
Zarqa
Arar
Sakaka
Marsa Matruh
Alexandria
Port Said
Al Ismailiya
Cairo
Suez
Faiyum
Siwa Oasis
Dahab
Tabuk
Al-Minya
Hail
Nariyah
Persian Gulf
Bandar Abbas
El Farafra Oasis
Egypt
Sohag
Qena
Al Ula
Simira
Az Zulfi
Khasab
Qatar
Shaqra
Hofuf
Dubai
Madha
Gulf of Oman
Idfu
Marsa Alam
Medina
Yanbu
Aswan
Ras Banas
Al Ain
United Arab Emirates
Saudi Arabia
Muscat
Al Shalaten
Nizwa
Sur
Halayeb
Wadi Halfa
Jeddah
Mecca
Oman
Al Bahah
Port Sudan
Red Sea
Dongola
Jubayt
Al Golad
Merowe
Atbara
Shendi
Salalah
Yemen
Khartoum
Kassala
Eritrea
Sana'a

Saudi Arabia Top 10 Parent Companies Pipeline
(All Pipeline Stages) 15 Jan 2021

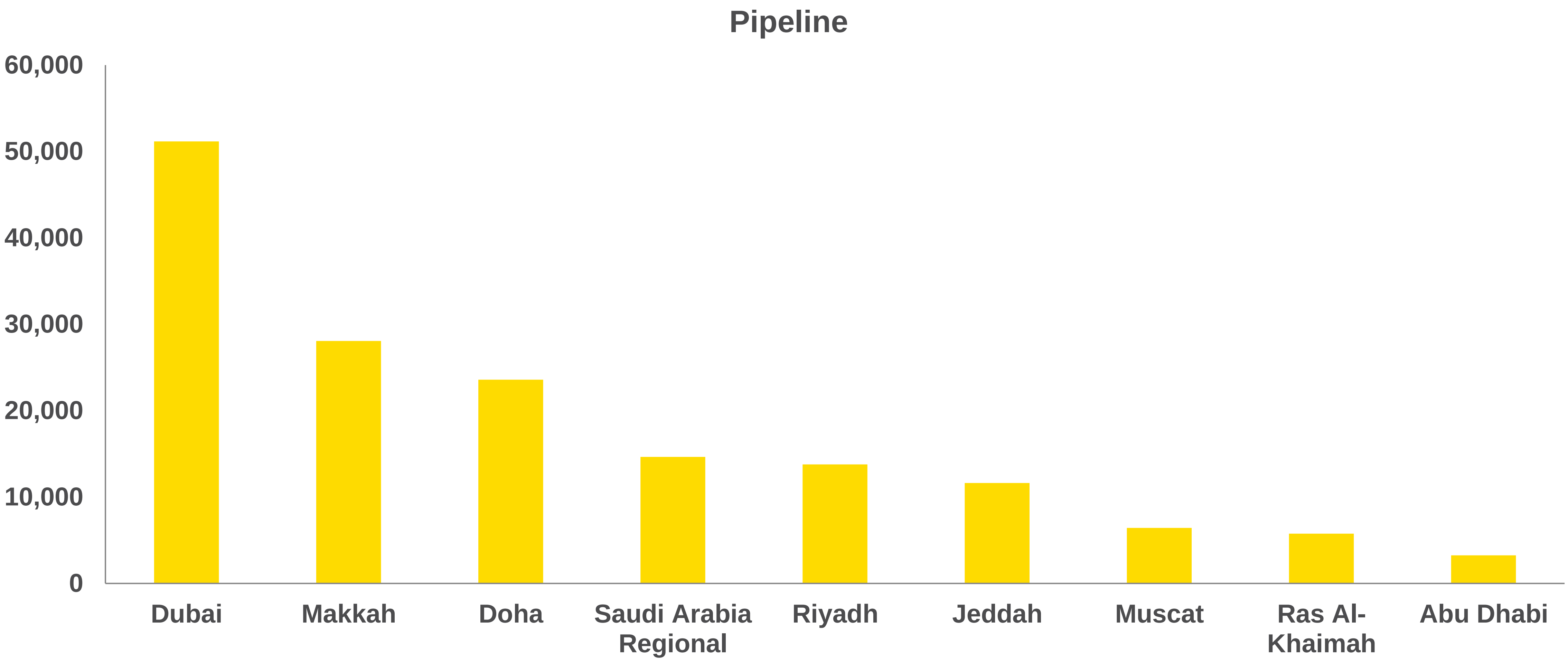
		Rooms			Rooms
1.	Hilton	12,578	6.	RHG RADISSON HOTEL GROUP	1,468
2.	ACCOR	12,561	7.	MILLENNIUM & COPTHORNE HOTELS plc	1,467
3.	Marriott	9,981	8.	HYATT	999
4.	IHG	5,225	9.	Rotana	840
5.	EMAAR	1,720	10.	Prince Hotels & Resorts	774

Saudi Arabia Top 10 Brands Pipeline (All Pipeline Stages) – 15 Jan 2021

		Rooms
1.	Hilton Garden Inn	4,904
2.	Novotel Hotels & Resorts	3,235
3.	ibis Styles Hotels	3,137
4.	DoubleTree by Hilton	3,027
5.	Fairfield by Marriott	2,600
6.	Courtyard Marriott	2,211
7.	Holiday Inn	1,969
8.	Hilton	1,662
9.	Address Hotels + Resorts	1,480
10.	ibis Hotels	1,345

What’s in the pipeline?

183,926 rooms still under contract across the Middle East



Middle East Top 16 Parent Companies Pipeline (Planning, Final Planning & In Construction as on 15 Jan 2021…..

		Rooms
1.	ACCOR	27,735
2.	Hilton	24,937
3.	Marriott	23,063
4.	IHG	9,862
5.	Rotana	8,418
6.	EMAAR	6,905
7.	MILLENNIUM & COPTHORNE HOTELS plc	3,925
8.	RHG RADISSON HOTEL GROUP	3,195

		Rooms
9.	WYNDHAM HOTELS AND RESORTS	1,894
10.	MINOR HOTELS	1,862
11.	Dusit Thani HOTELS & RESORTS	1,782
12.	HYATT	1,586
13.	MELIÃ HOTELS INTERNATIONAL	1,027
14.	Kempinski HOTELIERS SINCE 1897	981
15.	WHITBREAD	951
16.	شذا SHAZA HOTELS	883

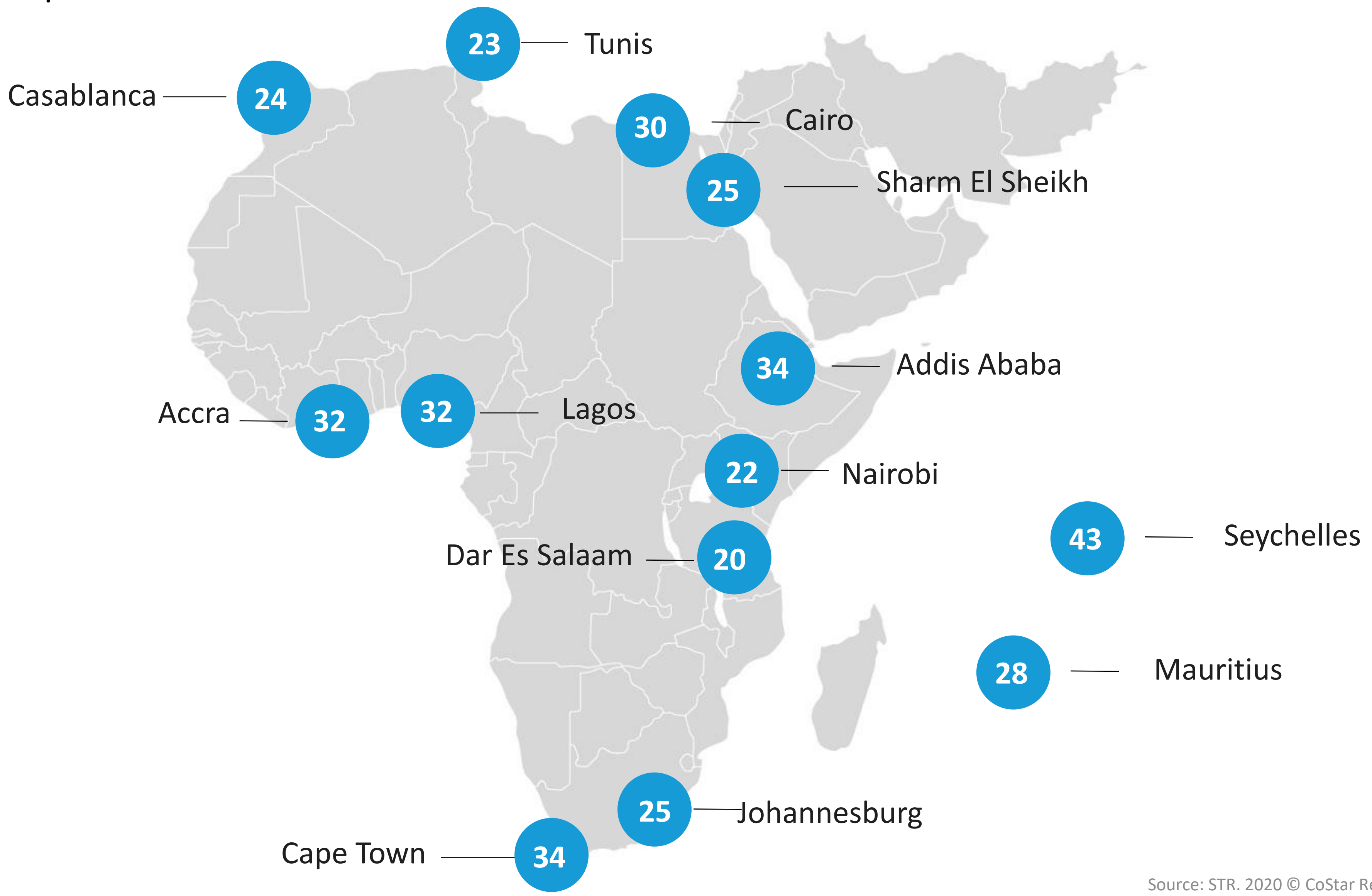
Middle East Top 16 Brands Pipeline as on 15 Jan 2021…..

		Rooms
1.	Hilton Garden Inn	6,389
2.	Hilton	5,921
3.	DoubleTree by Hilton	5,604
4.	Courtyard Marriott	4,124
5.	Novotel Hotels & Resorts	4,028
6.	ibis Styles	3,861
7.	Mövenpick Hotels & Resorts	3,634
8.	Millennium Hotels and Resorts	3,053
9.	Rotana	2,910
10.	Rove Hotels	2,835
11.	Holiday Inn	2,813
12.	ريحان Rayhaan Hotels & Resorts	2,801
13.	Fairfield by Marriott	2,800
14.	Address Hotels + Resorts	2,449
15.	Fairmont	2,108
16.	Residence Inn by Marriott	2,057

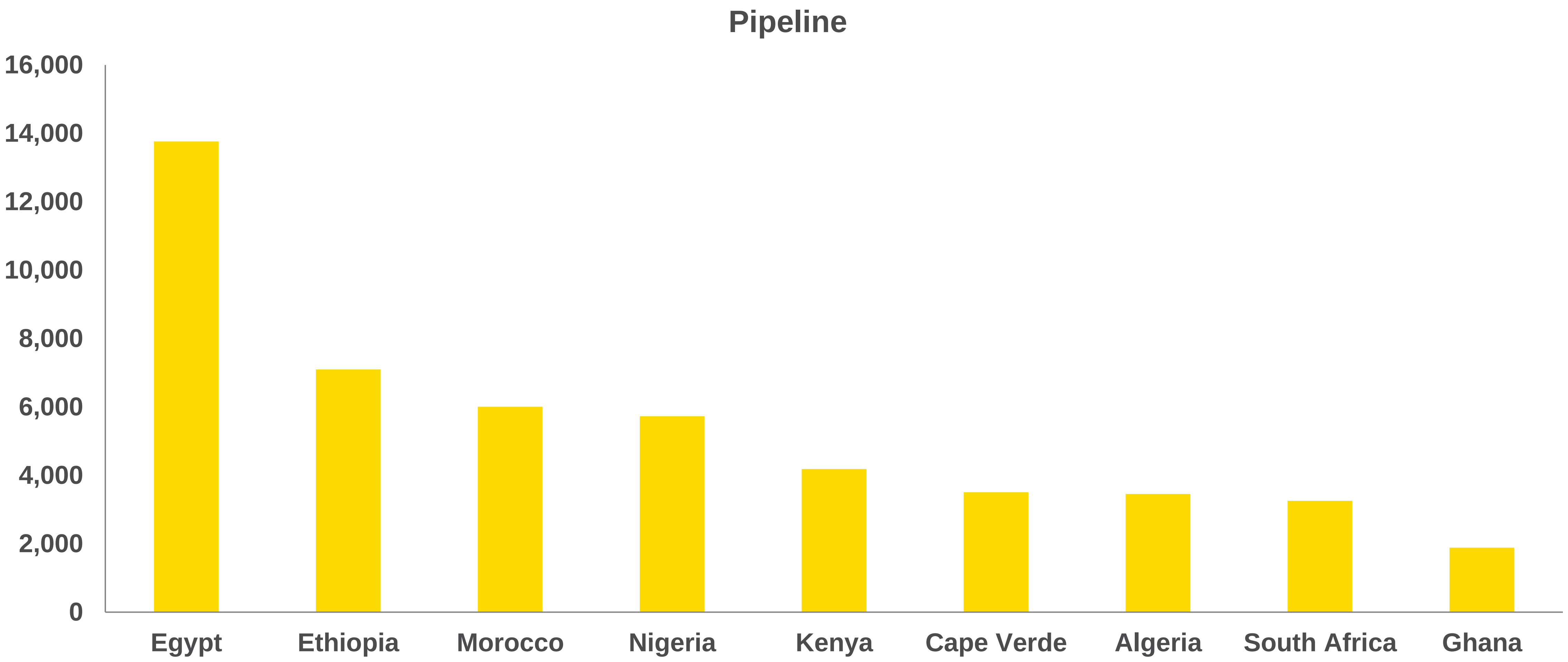

Africa

Africa occupancies at very low levels

Occupancy of open hotels – 2020 Full Year



64,419 under contract in Africa with a fifth being in Egypt



Africa Top 10 Parent Companies Pipeline as on 15 Jan 2021.....

		Rooms			Rooms
1.	Marriott	16,324	6.	MELIÃ HOTELS INTERNATIONAL	2,146
2.	ACCOR	14,976	7.	HYATT	1,547
3.	Hilton	10,427	8.	WYNDHAM HOTELS AND RESORTS	1,200
4.	IHG	2,836	9.	Rotana	1,162
5.	RHG RADISSON HOTEL GROUP	2,684	10.	EMAAR	1,028

Africa Top 16 Brands Pipeline (Planning, Final Planning & Under Construction) as on 15 Jan 2021…..

		Rooms
1.	Hilton	5,458
2.	Mövenpick Hotels & Resorts	2,933
3.	Marriott	2,820
4.	Protea Hotels Marriott	2,432
5.	Rixos Hotels	2,110
6.	Four Points by Sheraton	2,067
7.	Fairmont Hotels & Resorts	2,029
8.	Novotel Hotels & Resorts	1,950
9.	Meliá Hotels International	1,935
10.	Hilton Garden Inn	1,783
11.	DoubleTree by Hilton	1,773
12.	Sheraton	1,295
13.	Pullman Hotels and Resorts	1,230
14.	InterContinental Hotels & Resorts	1,178
15.	JW Marriott	1,087
16.	Swissôtel	1,037

Thank You!

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Hotel News Now

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