



# **Deloitte Analysis of Selected STR Global Hotel Performance Data for the Middle East**

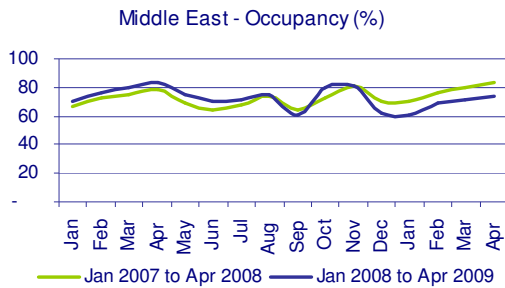
**As at April 2009**



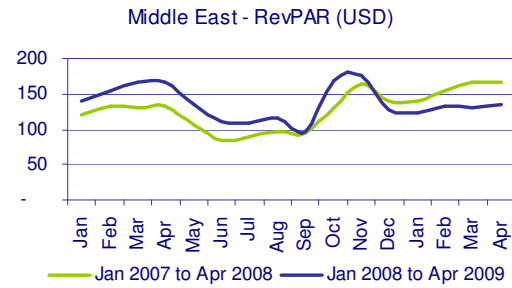
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## Deloitte Analysis of Selected STR Global Hotel Performance Data for the Middle East

### Middle East



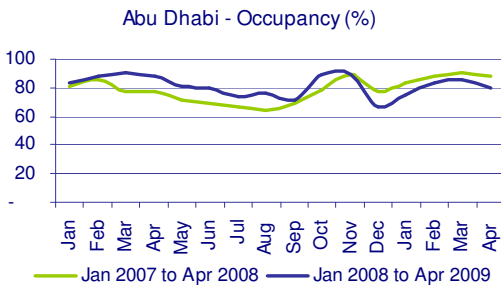
Source: STR Global Hotel Survey, April 2009



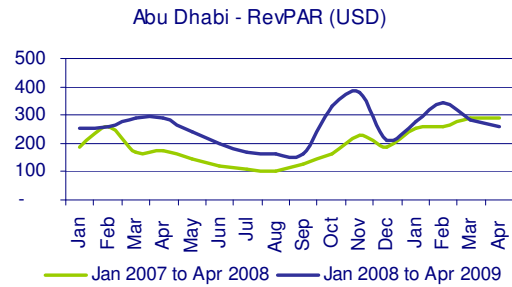
Source: STR Global Hotel Survey, April 2009

- The Middle East in general witnessed a decline in occupancy of 9.6% and RevPAR of 14.9% during year to date April 2009 compared to 2008;
- The region has been affected due to declines in occupancies and RevPARs in key markets such as Dubai.

### Abu Dhabi



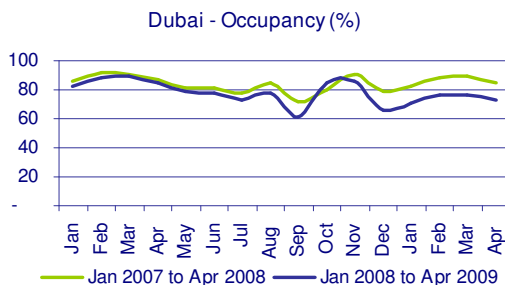
Source: STR Global Hotel Survey, April 2009



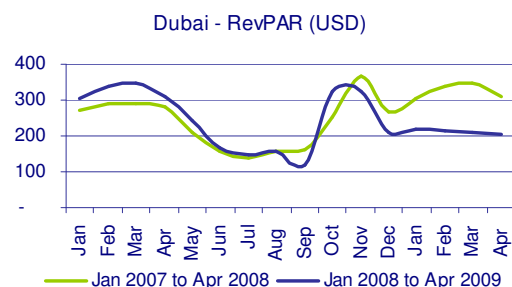
Source: STR Global Hotel Survey, April 2009

- After a year long history of growth, Abu Dhabi witnessed a dip in occupancy during the first four months of 2009;
- Abu Dhabi witnessed a decline in occupancy of 6.6% and a growth in RevPAR of 10.5% during year to date April 2009 when compared to 2008;

### Dubai



Source: STR Global Hotel Survey, April 2009

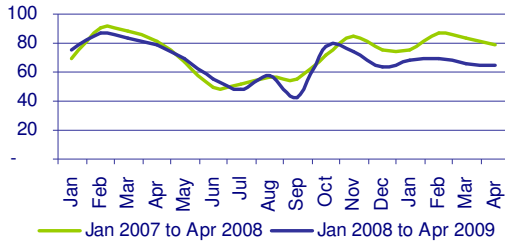


Source: STR Global Hotel Survey, April 2009

- Dubai witnessed a drop in occupancy of 16.0% and RevPAR of 34.5% during year to date April 2009 when compared to 2008;
- Dubai is challenged with continued new supply of hotel rooms. Demand generation efforts continue to play an important role in marketing strategies of hoteliers.

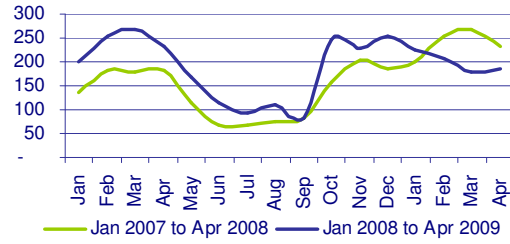
## Muscat

Muscat - Occupancy (%)



Source: STR Global Hotel Survey, April 2009

Muscat - RevPAR (USD)

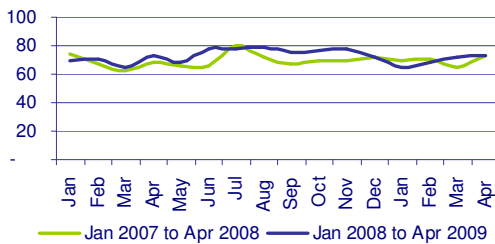


Source: STR Global Hotel Survey, April 2009

- One of the fastest growing regions in 2008, Muscat experienced a decline in occupancy and RevPAR in the first four months of 2009;
- Statistics for year to date April 2009 when compared to 2008 recorded a decline in occupancy of 19.8% and RevPAR of 6.3%.

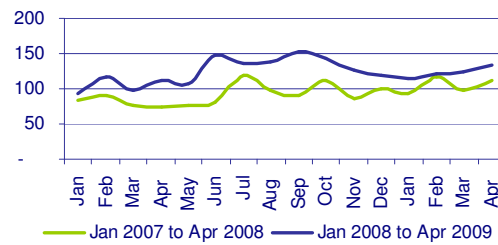
## Jeddah

Jeddah - Occupancy (%)



Source: STR Global Hotel Survey, April 2009

Jeddah - RevPAR (USD)

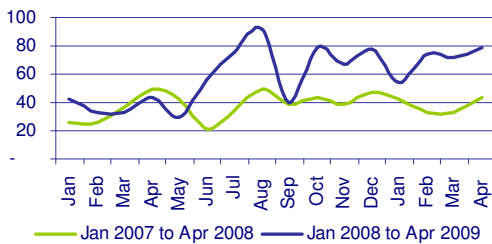


Source: STR Global Hotel Survey, April 2009

- Jeddah has been experiencing a steady trend in hotel performances in the region;
- Statistics for year to date April 2009 compared to 2008 reflected increases in occupancy of 3.7% and RevPAR of 28.2%.

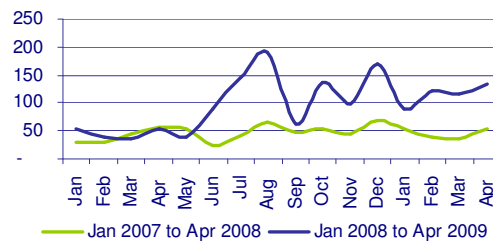
## Beirut

Beirut - Occupancy (%)



Source: STR Global Hotel Survey, April 2009

Beirut - RevPAR (USD)



Source: STR Global Hotel Survey, April 2009

- The year to date April 2009 trends when compared to 2008 reflected an increase in occupancy of 83.6% and RevPAR of 155.1%;
- Beirut is experiencing a significant inflow of visitors to the area as a result of the return to stability.



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