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Middle East
Hospitality Sentiment Survey

September 2020

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Introduction

To help identify the impact of COVID-19, Deloitte is conducting a periodic survey of sentiment in the Middle East hospitality market

This Report presents the findings from the Middle East Sentiment Survey, conducted in September 2020. The findings are based on the responses of professionals in the hospitality industry.

The findings in this Report represent the first survey conducted specifically for the Middle East.

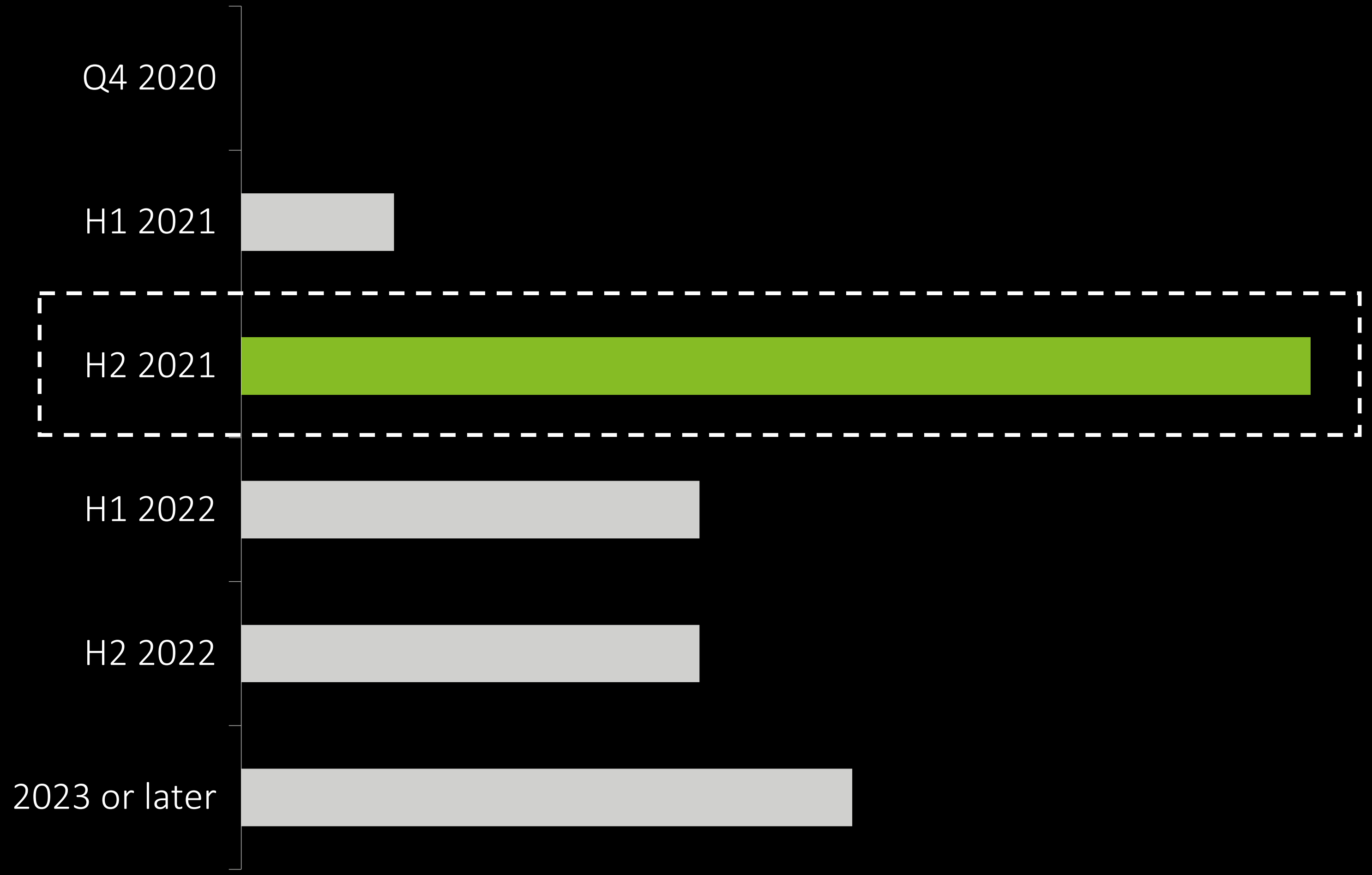
Stay tuned for our next set of findings and please contact deloittemefa@deloitte.com to sign up to our Real Estate and Hospitality mailing list.

We have previously conducted this survey for the European market, with the results available here.

When do you expect material disruption in the hospitality sector to end?

39% of the respondents believe H2 2021 is when disruption will end.

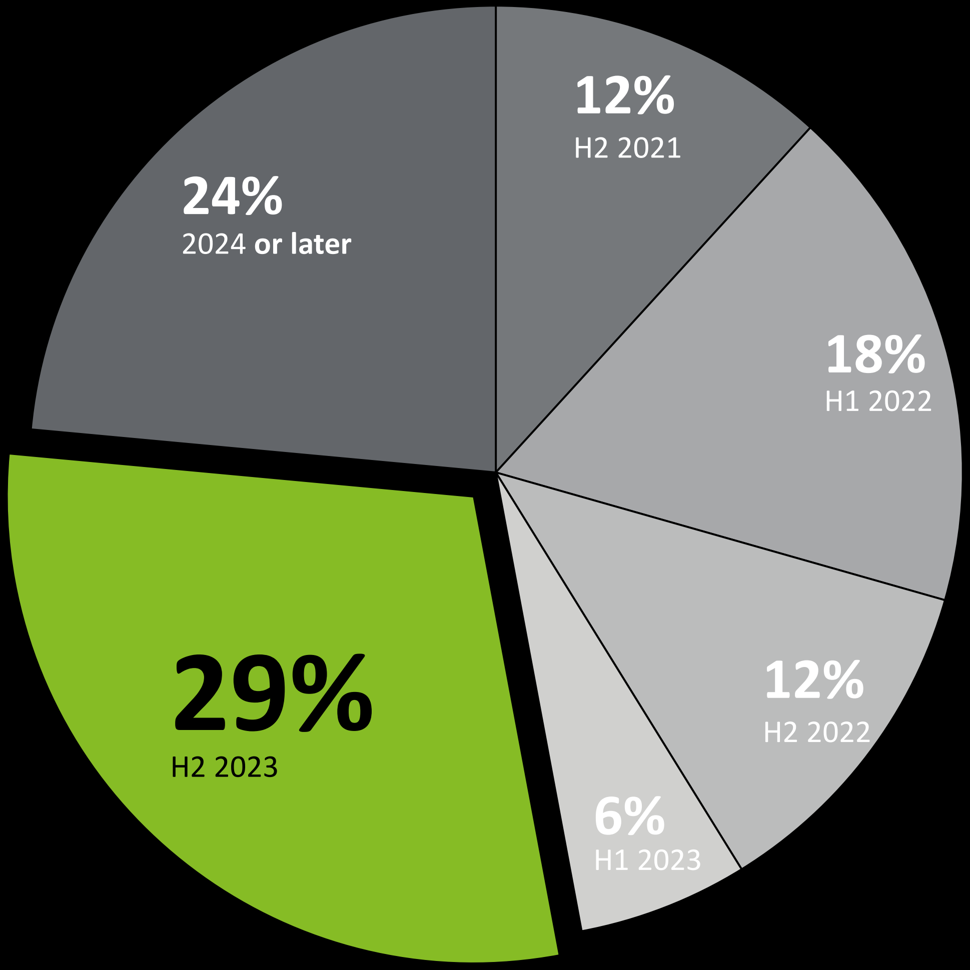
22% of the respondents consider disruption will continue to 2023 or later.



When do you think that the hospitality industry performance will return to 2019 levels?

29% of the respondents believe H2 2023 is when performance will return to 2019 levels.

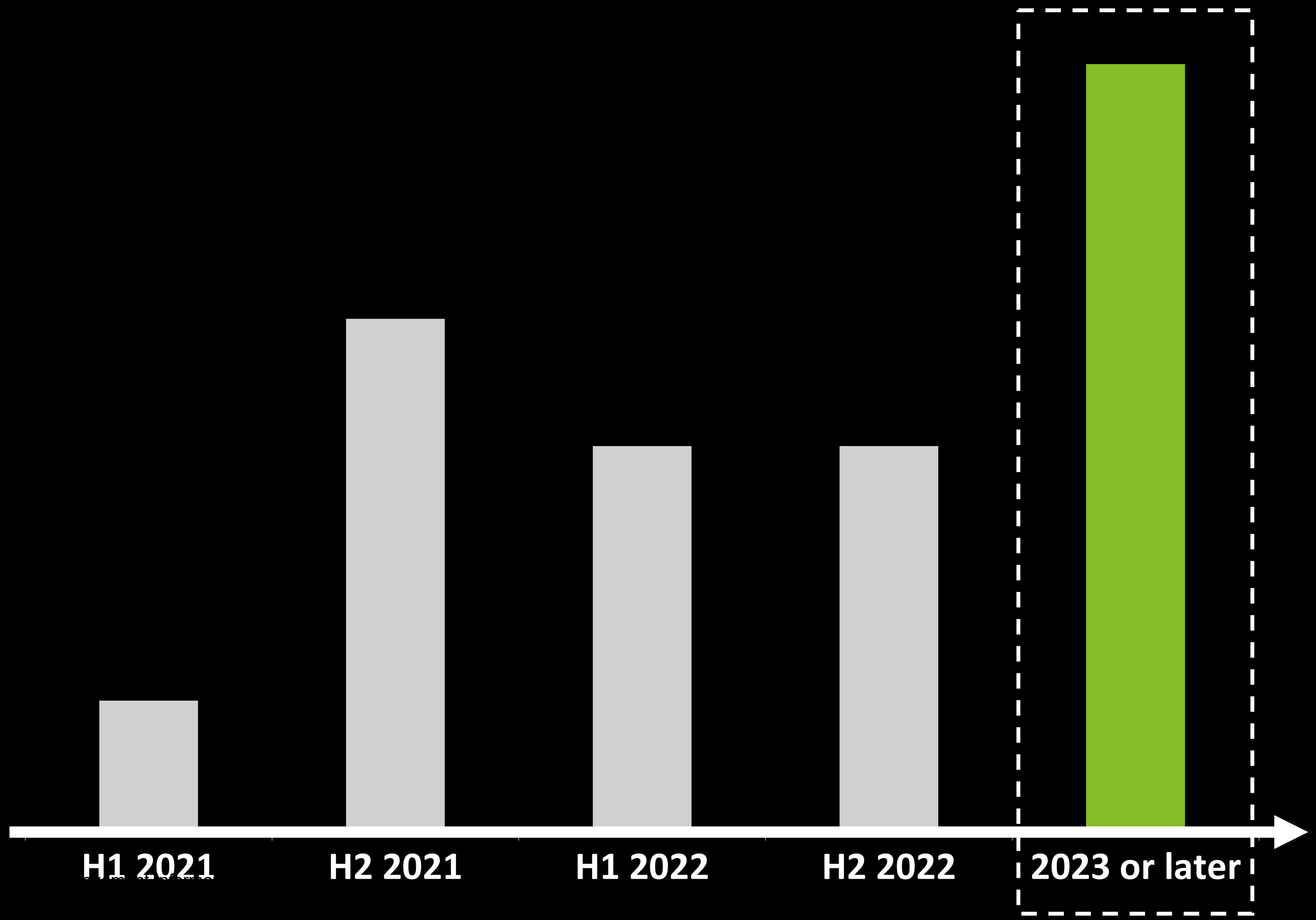
A further 24% of respondents consider performance will return to 2019 levels in 2024 or later.



When do you think international demand will outstrip domestic demand for hotel rooms?

35% of respondents believe international demand for hotels will outstrip domestic demand in 2023 i.e. not for a further 27 months.

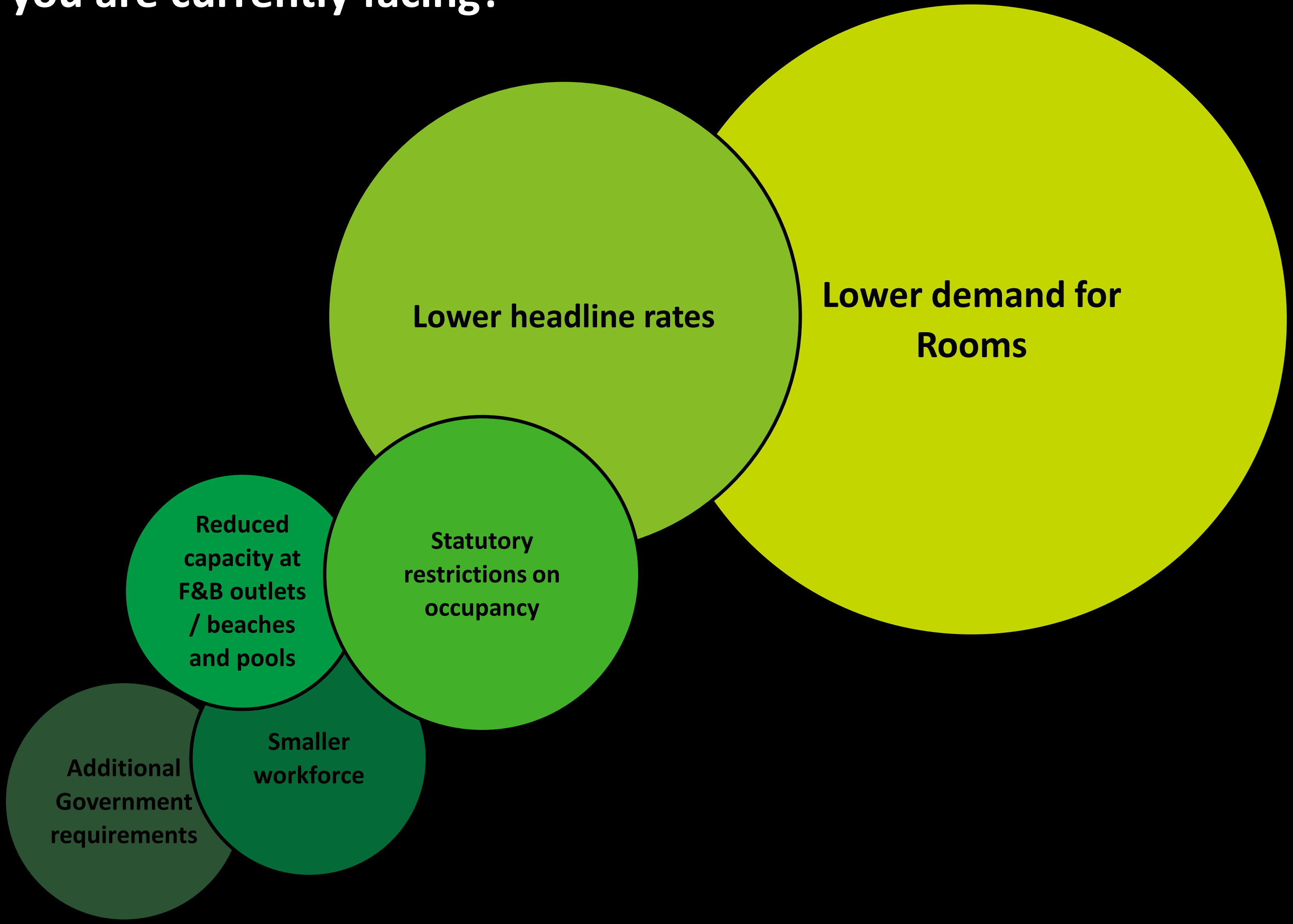
Conversely, 30% of respondents believe that international demand will outstrip domestic in 2021.



What is the biggest issue you are currently facing?

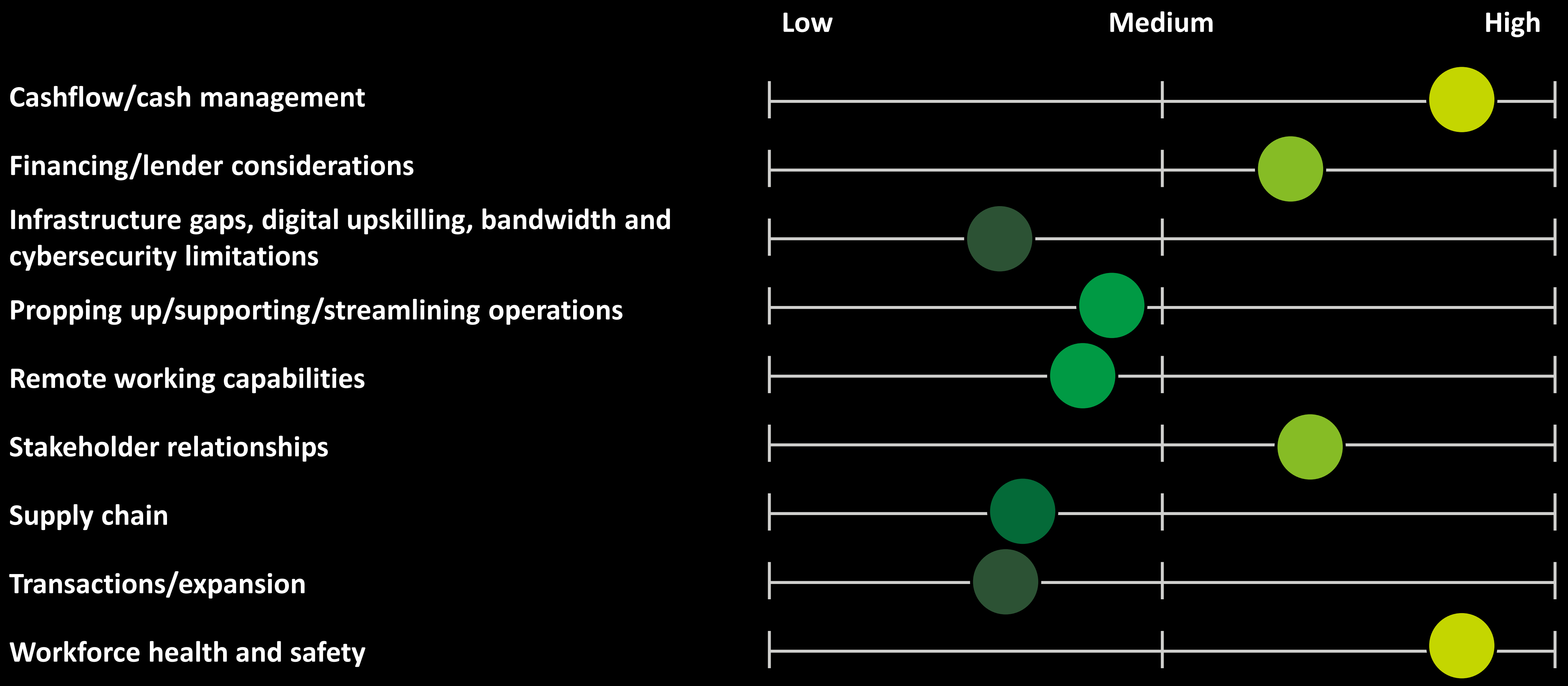
The highest proportion of respondents stated that the biggest issue they are currently facing is lower demand for rooms, followed by lower headline rates.

Statutory restrictions on occupancy and capacity limits are also affecting performance.



What are your key priorities over the next four weeks?

The respondents ranked each priority low, medium and high



Which Middle Eastern market do you consider will witness the fastest recovery?

Respondents rated Abu Dhabi, Dubai and Riyadh as the locations that are likely to recover the quickest.

Meanwhile respondents rated Doha, Makkah and Jeddah as being likely to recover reasonably quickly.

Whilst Kuwait City and Amman were rated as the locations likely to experience the slowest recovery.

Key Contacts

Please reach out with any questions

Dunia Joulani
Head of Travel, Hospitality and Leisure MENA
Deloitte Middle East
+971 56 622 8692
djoulani@deloitte.com

Hassan Malik
Director
Deloitte Middle East
+971 50 619 2447
hmalik@deloitte.com

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