

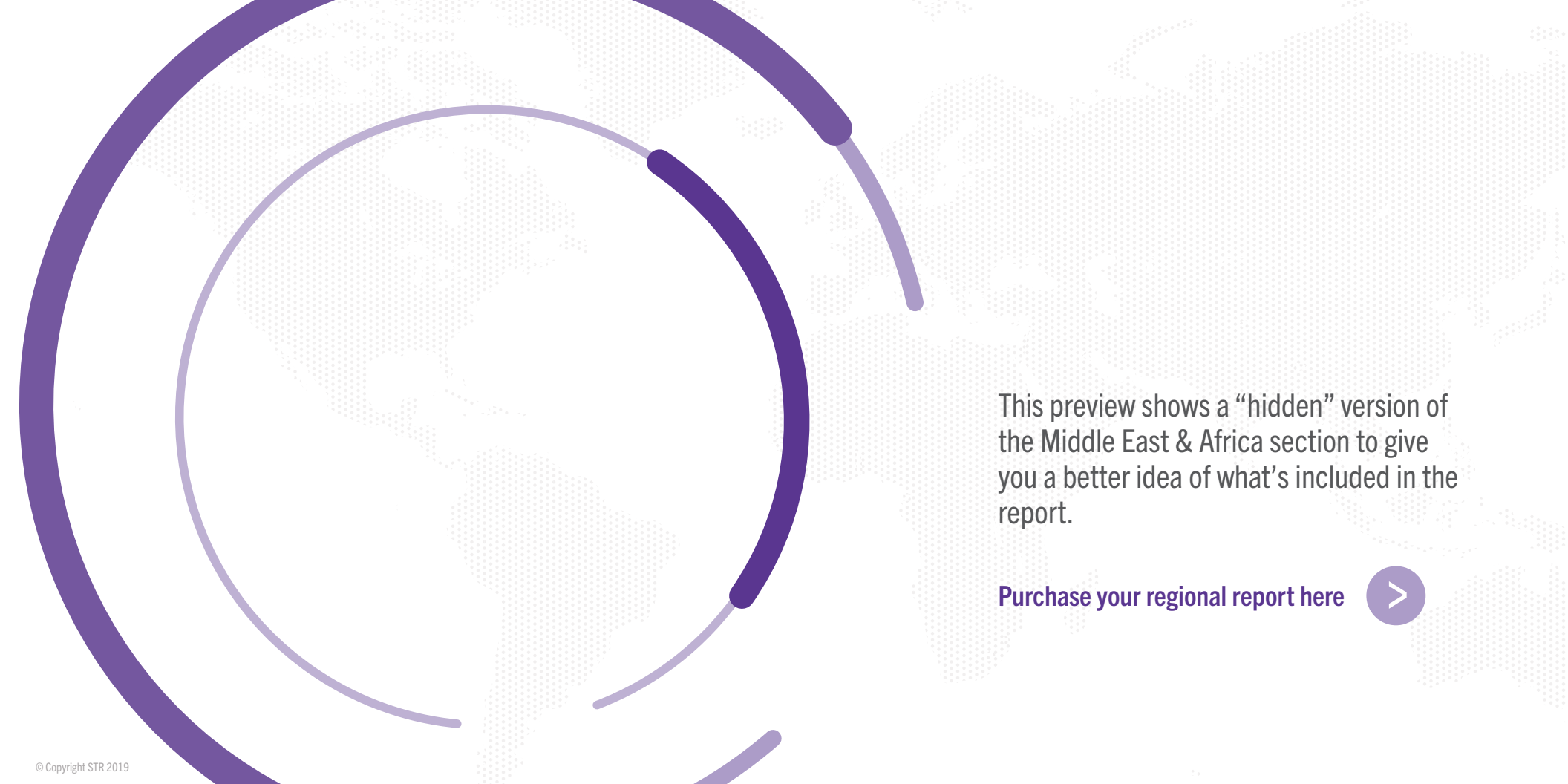
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2018

Middle East & Africa

The hospitality industry in review





This preview shows a “hidden” version of the Middle East & Africa section to give you a better idea of what’s included in the report.

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Key Findings by Region & Markets Included

Middle East & Africa

- Middle East sees ADR drop
- Dubai builds up for 2020 Expo
- Mixed pictures throughout Africa

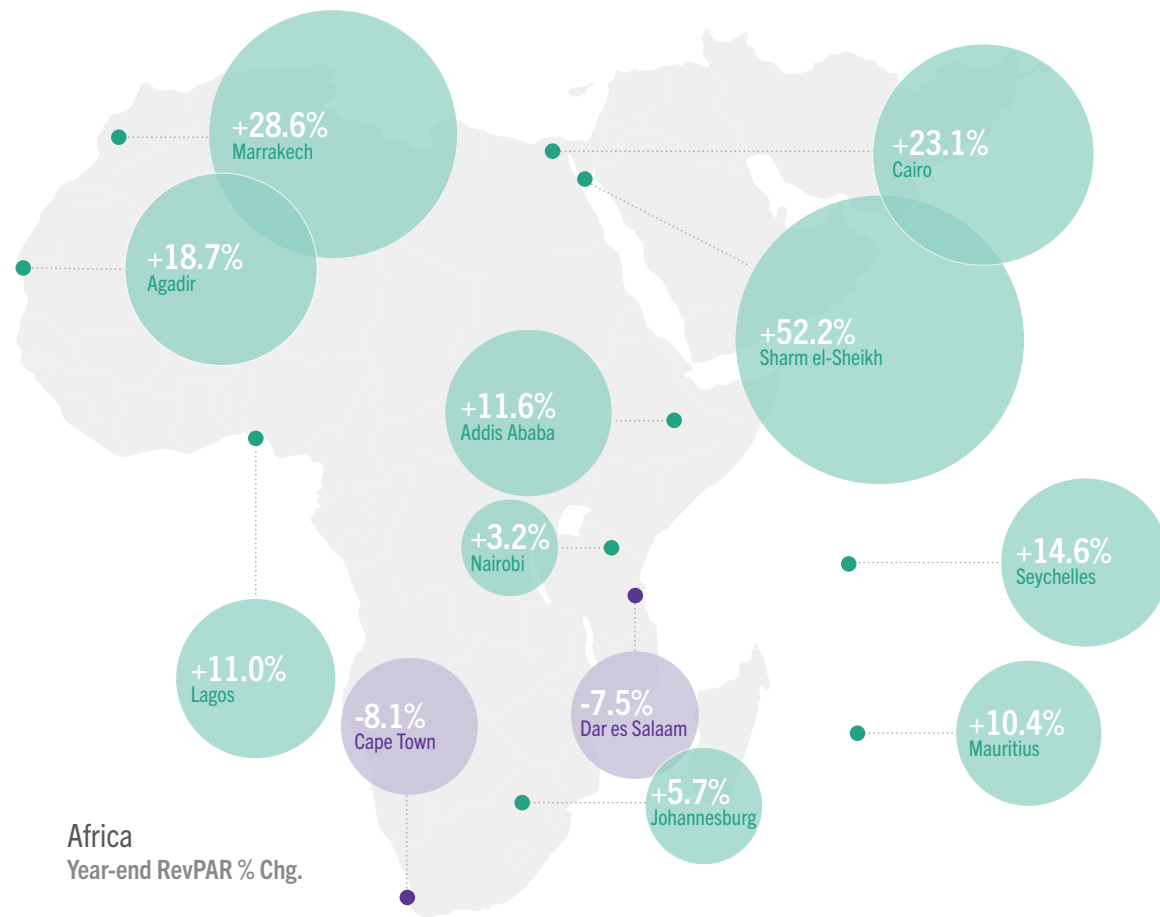
Markets in this report:

Agadir	Sharm el-Sheikh	Doha
Mauritius	Cairo/Giza	Makkah
Seychelles	Marrakech	Dar es Salaam
Addis Ababa	Jeddah	Abu Dhabi
Kuwait City	Nairobi	Cape Town
Lagos	Dubai	
Johannesburg	Riyadh	



Mixed pictures throughout Africa

Across the continent, there are numerous types of market offerings and drivers of demand. Overall, Africa's hotel sector posted a 12.1% increase in RevPAR for 2018, with the majority of this growth driven by Northern Africa (RevPAR: +27.2%). Markets in the north are seeing recovery following declines in recent years due to security concerns. Noteworthy RevPAR increases were seen in Cairo and Marrakech. Performance was also mainly positive in East Africa. The diplomatic capital of Addis Ababa posted an 11.6% RevPAR growth for the year, having finally adjusted to supply growth it has experienced in recent years, but the market currently has the second-largest pipeline in Africa. Nairobi also posted growth in 2018, with RevPAR up 3.2% as a 26.4% jump in demand eclipsed a 13.2% increase in supply. Increases in oil prices helped boost hotel performance in Western Africa, including Lagos and Accra. However, both Abidjan and Conakry saw declines due to supply growth. Performance was more mixed in South Africa. RevPAR was up in Lusaka, Gaborne and Johannesburg, but down in Windhoek, Maputo and Cape Town (due to a water shortage as well as strong supply growth). Leisure travel to Africa's main holiday islands was also buoyant, with RevPAR increases in Cape Verde, the Seychelles and Mauritius.



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