



Global Hospitality Performance



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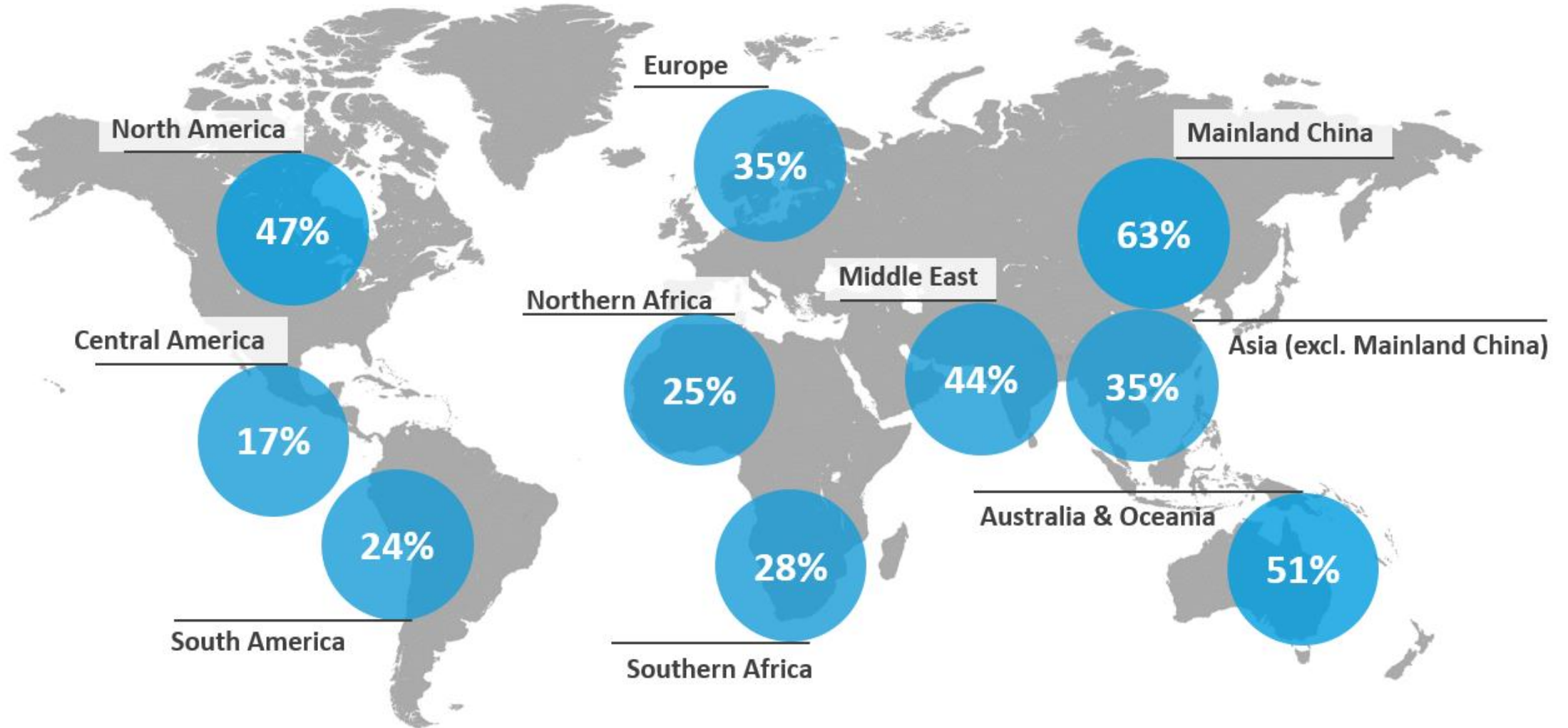


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China Leading the Way – a Benchmark Most Would Be Happy With

Occupancy, Week ending October 4, 2020



Lack of Corporate Demand Slows Recovery in Cities

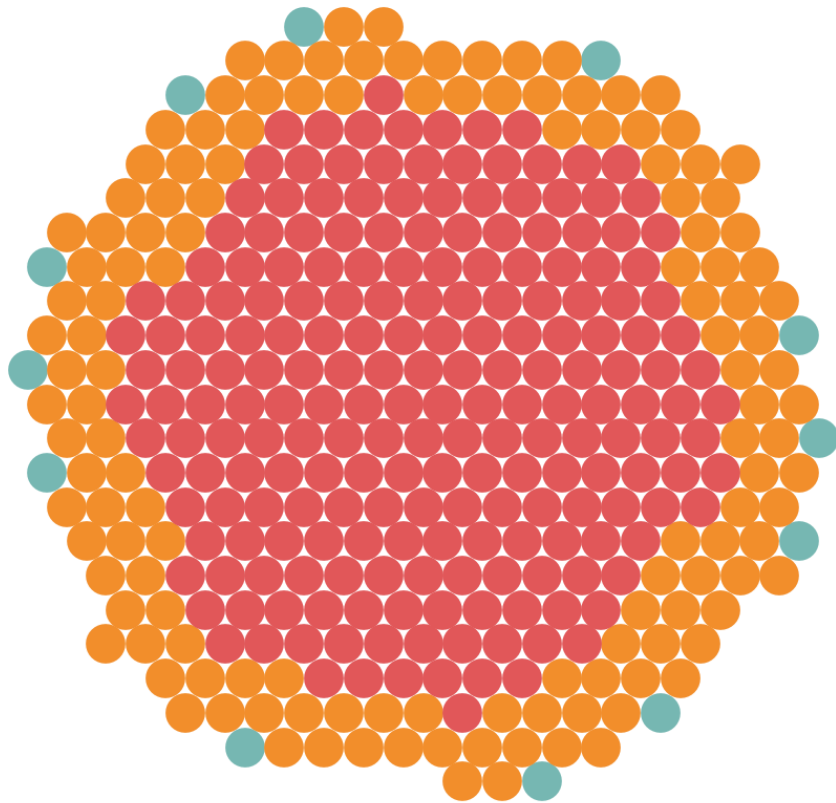
Occupancy actuals, week ending October 4, 2020



Asia Pacific Submarkets are Transitioning

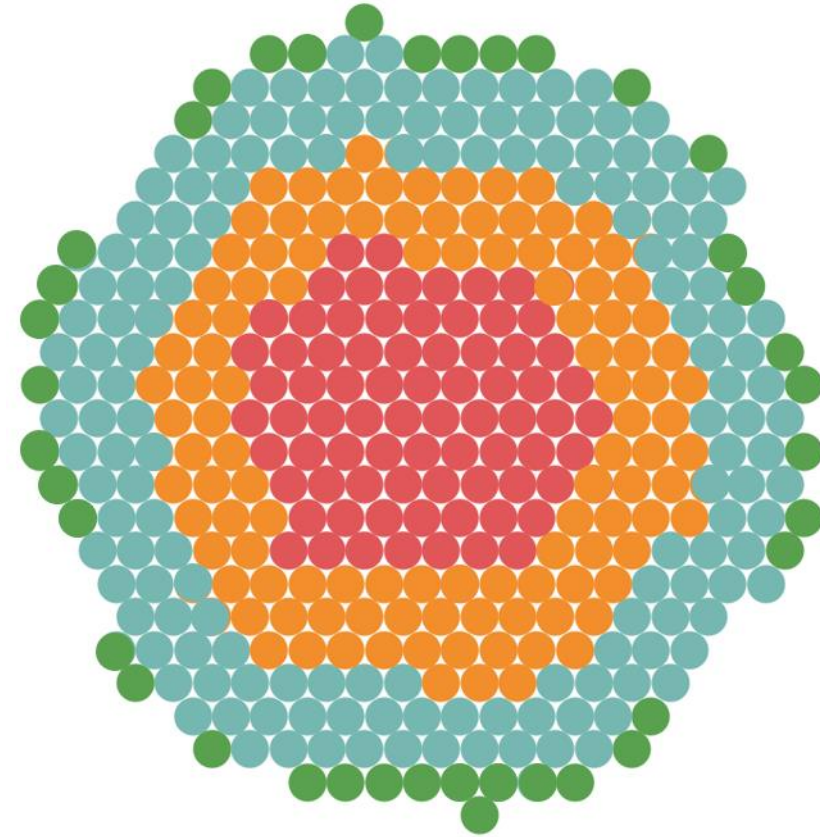


R7



Week of April 4th

R7



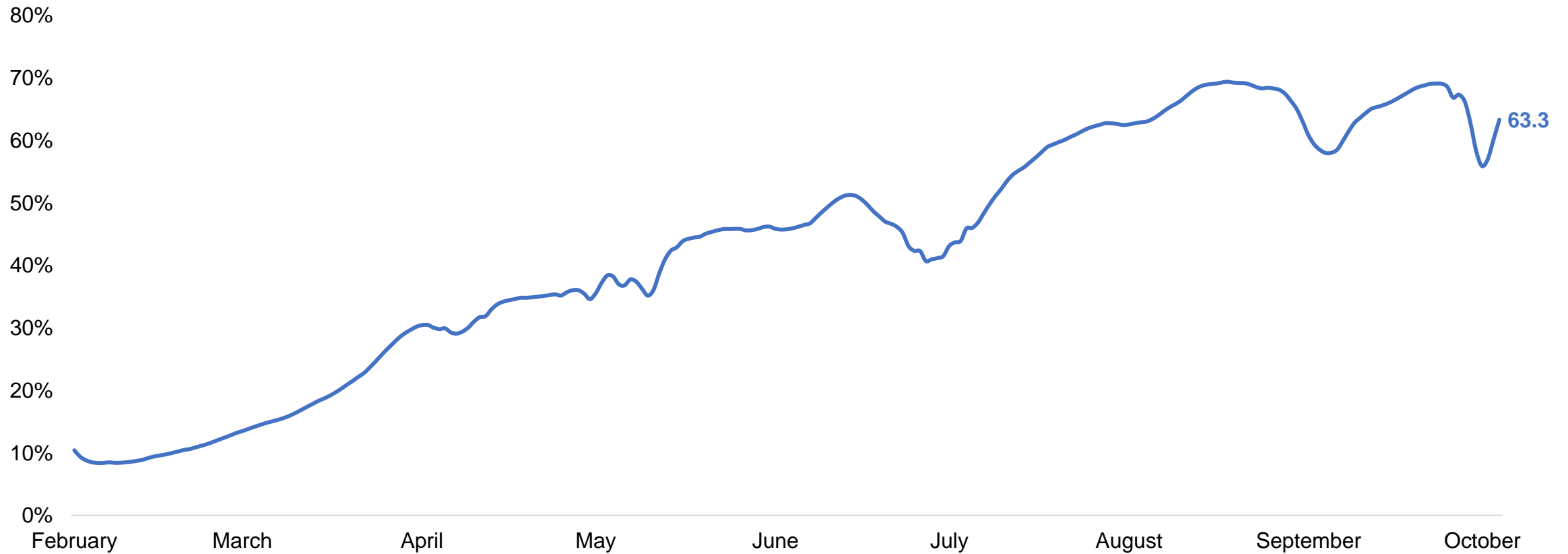
Week of October 3rd

Occupancy Bucket

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

China Bounces Back

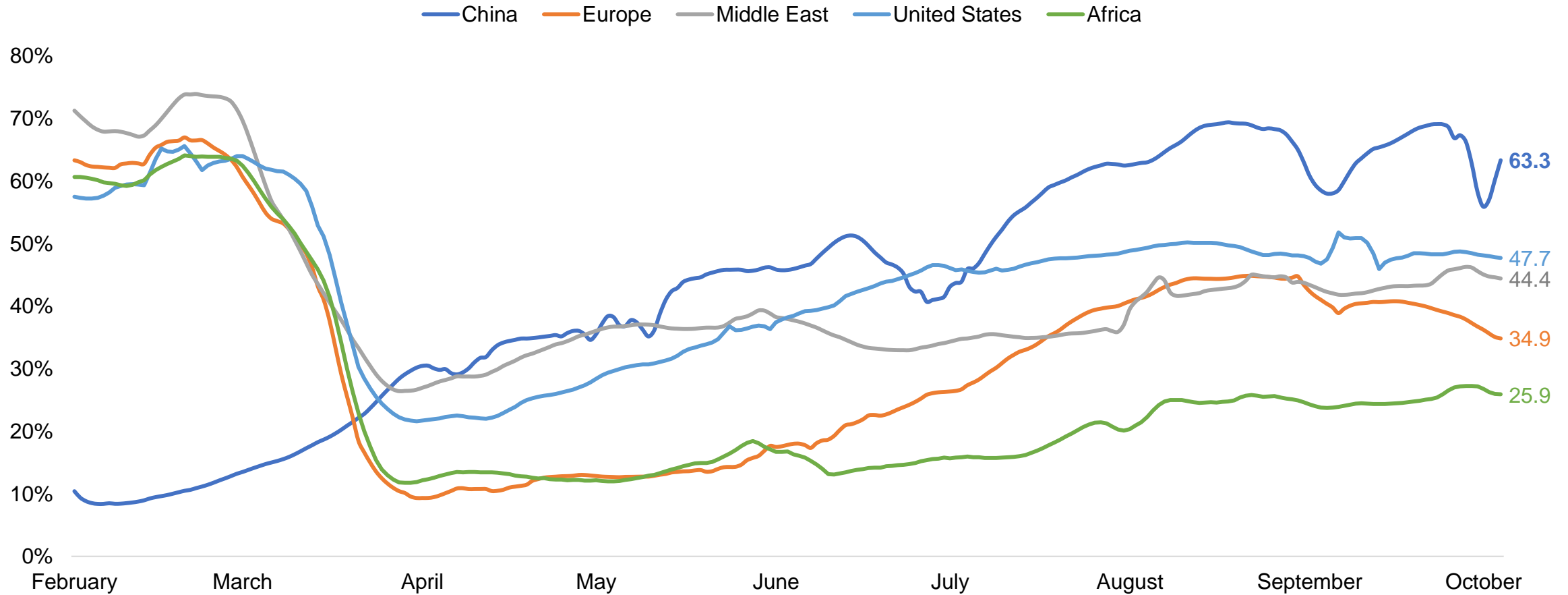
Rolling 7-day Occupancy, Feb 1 – Oct 4, 2020



Europe's Recovery Delayed, and Africa Delayed Even More

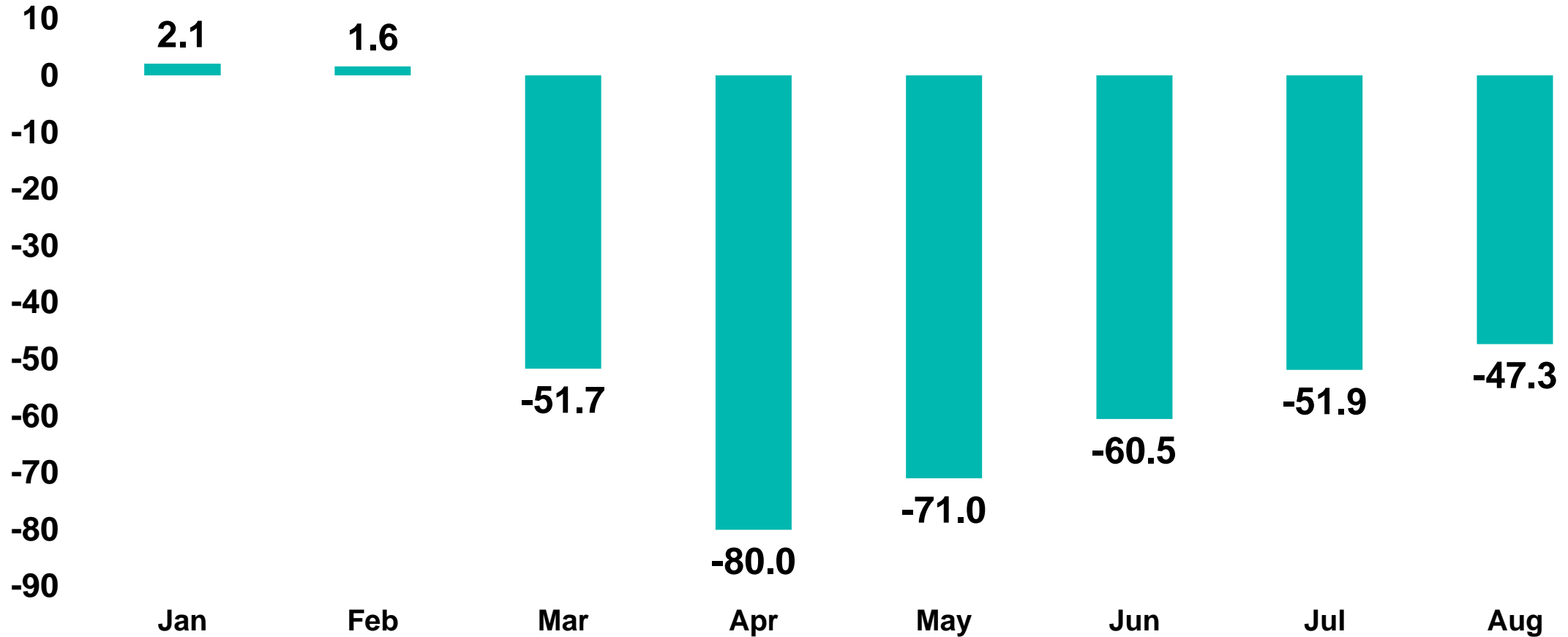


Rolling 7-day Occupancy, Feb 1 – Oct 4, 2020



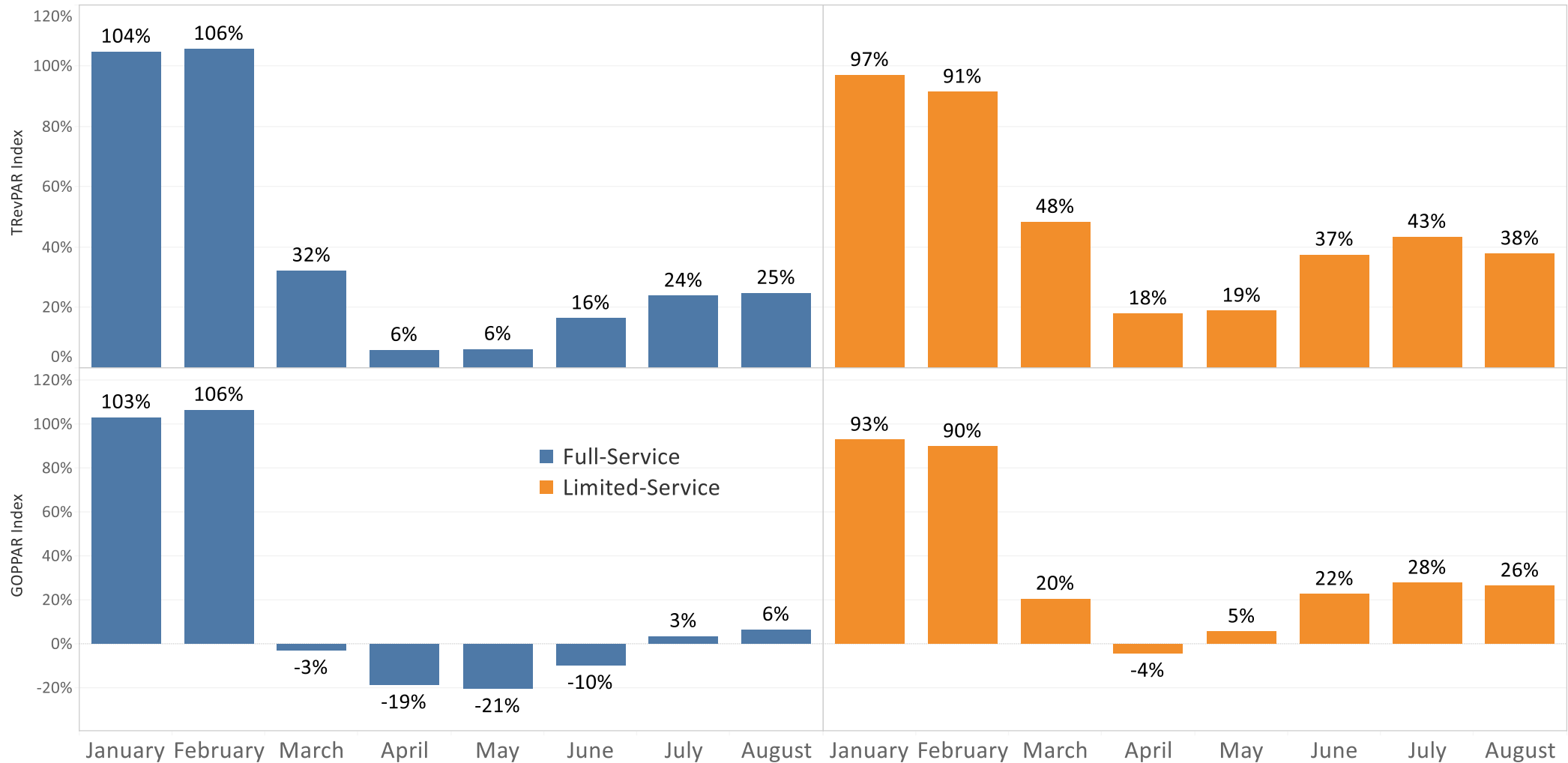
RevPAR Growth: Step by Step...

Total US, Jan – Aug 2020



Revenues Improving, but Profits Remain Weak Compared to LY

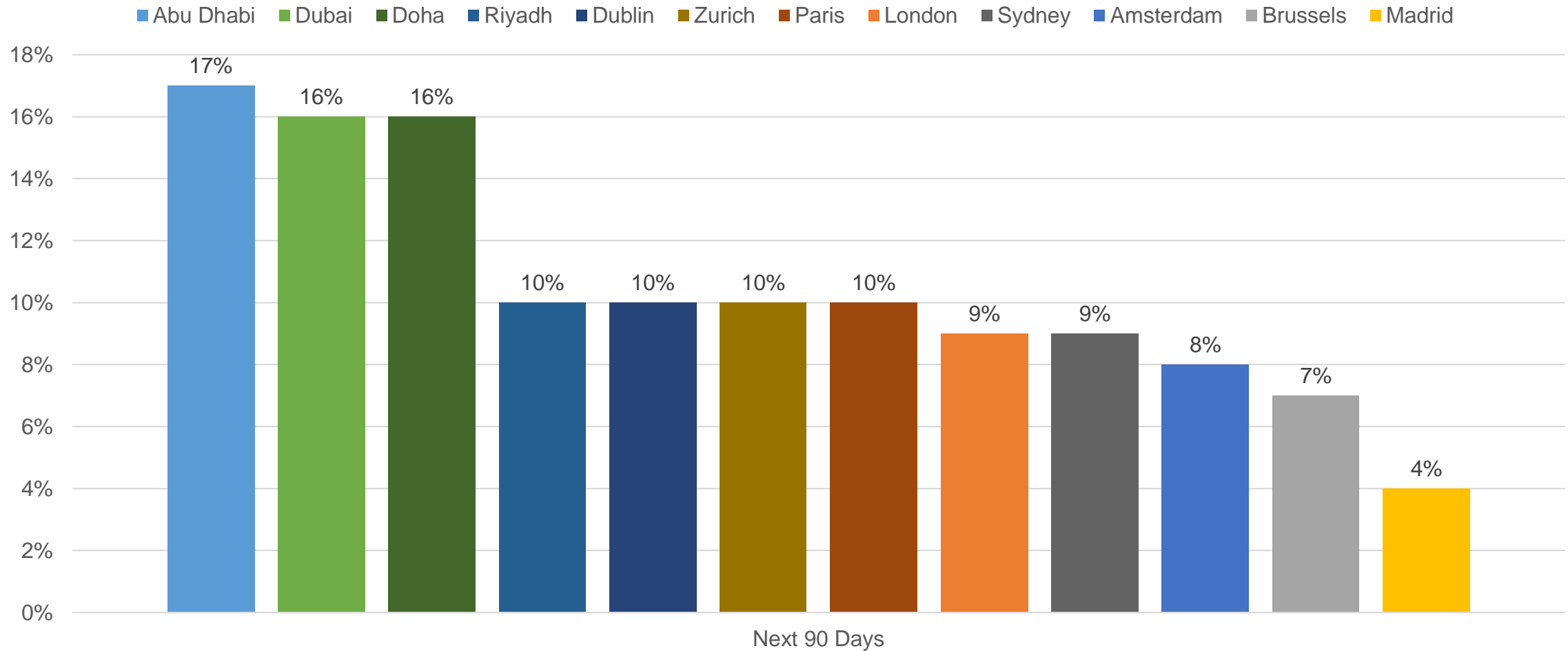
TRevPAR & GOPPAR indexed to same months last year



UAE Forward Occupancy Better Than Most Markets

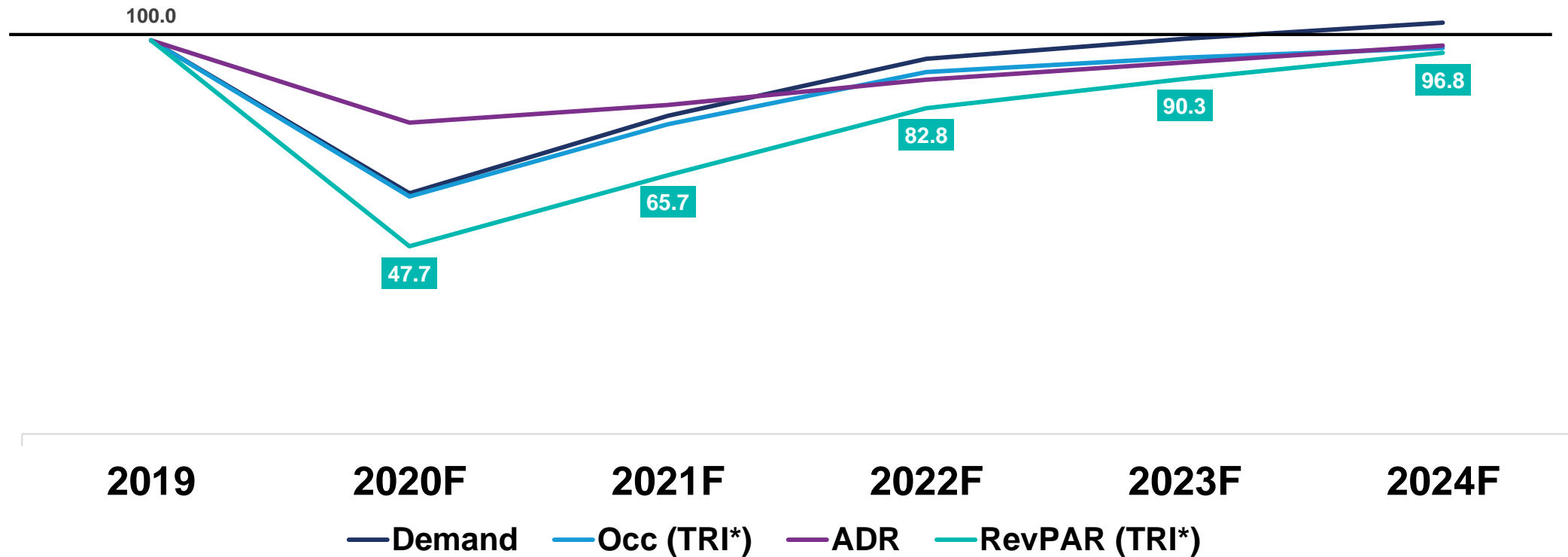


Occupancy on the books for next 90 days as of September 21, 2020



U.S. Forecast: COVID-19 Recovery Scenario

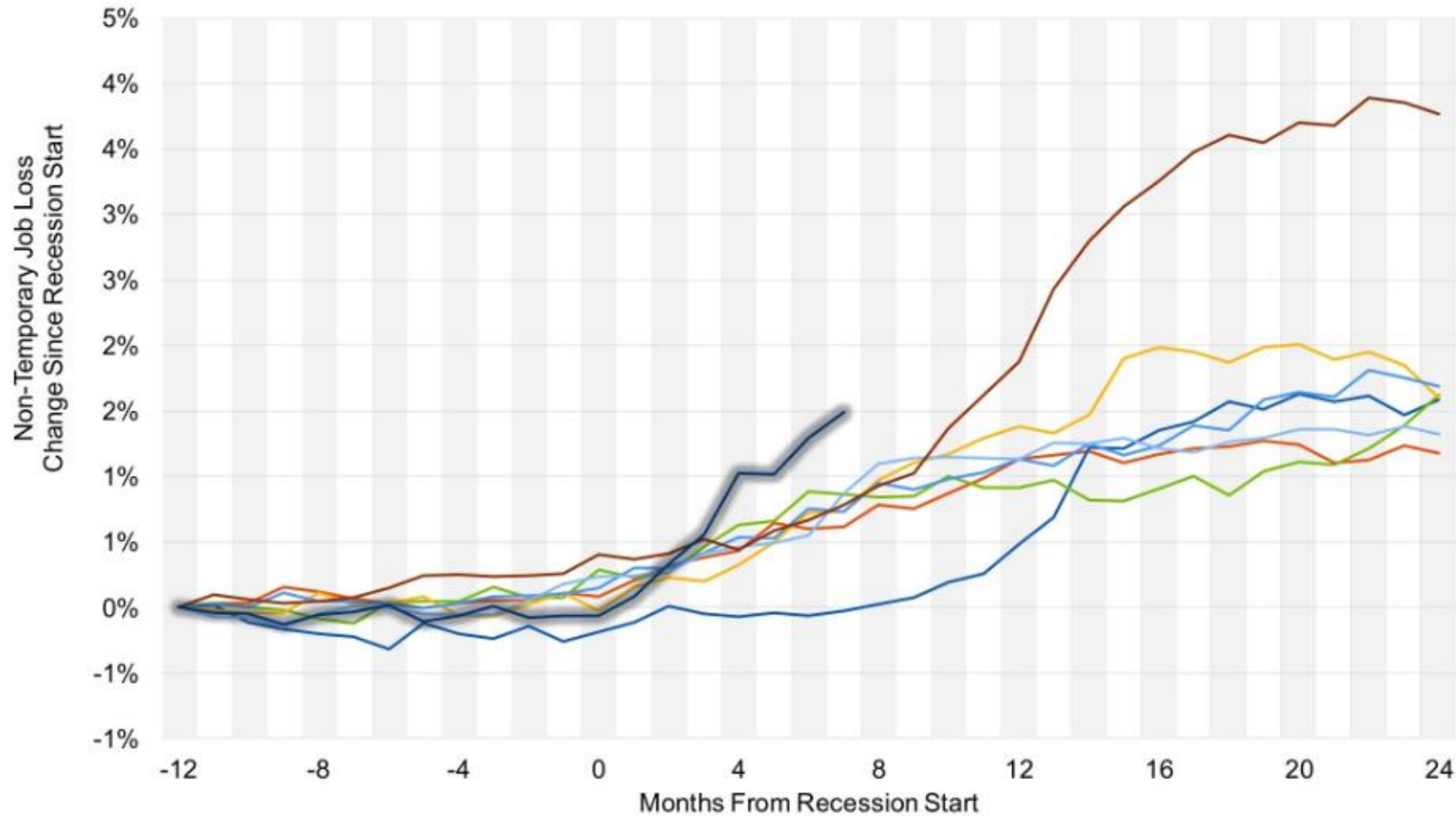
Indexed to end of 2019
2020F – 2024F



*Reflects Total-Room-Inventory (TRI) methodology, which assumes no temporary hotel closures.

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

Permanent Job Losses Mounting Fast



Source: BLS, Haver
As of Oct-20

— 1969 — 1973 — 1980 — 1981 — 1990 — 2001 — 2007 — 2020

