Beyond the peak: what the numbers say about the next chapter in hospitality

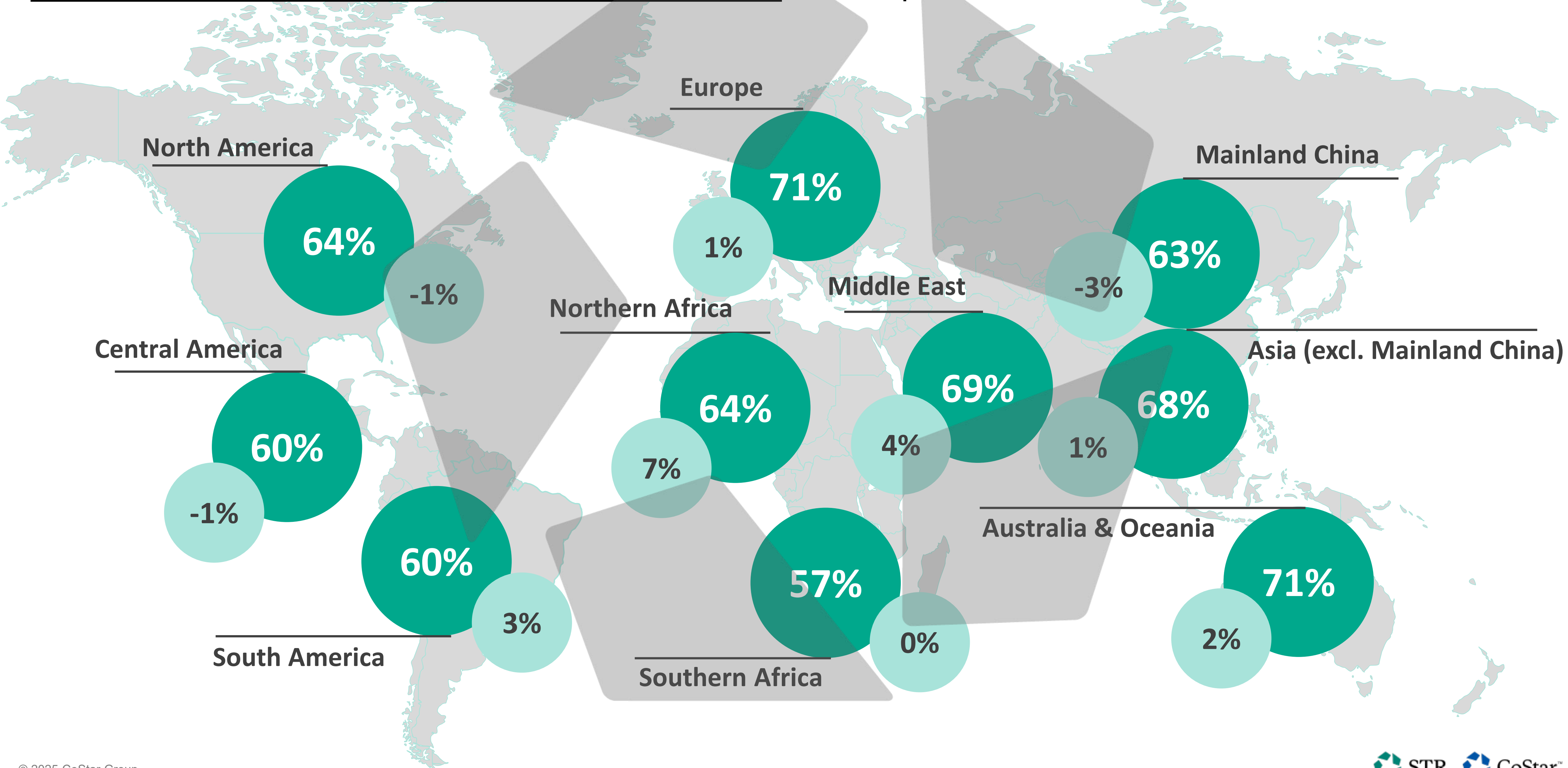
FHS World
28th October 2025

Sarah Duignan
Director, Client Relationships
sduignan@str.com

Getting to grips with the Global hotel landscape

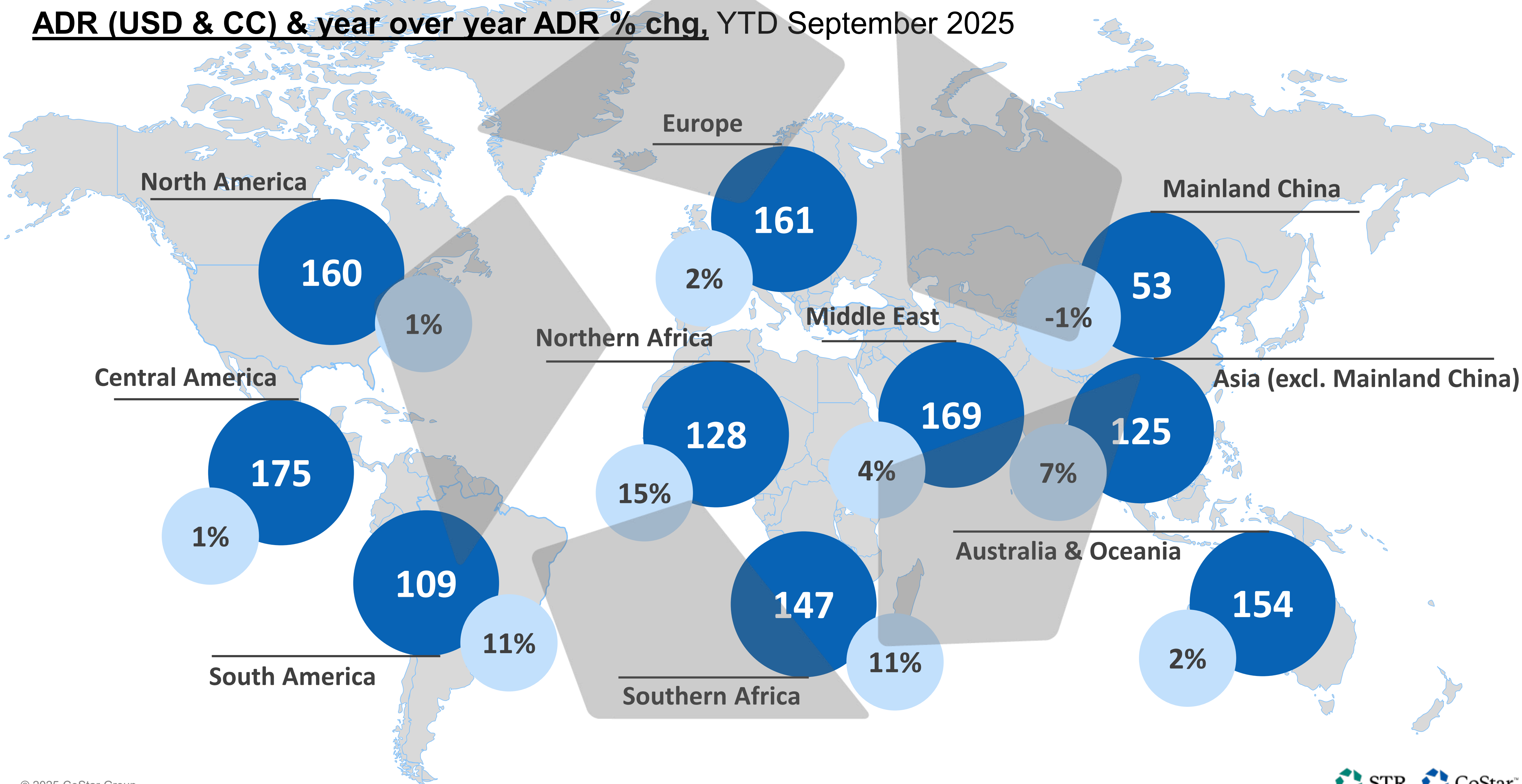
Positive demand growth drives positive occupancy growth

<u>Occupancy % & year over year occupancy % chg,</u> YTD September 2025



Which in turn, provides a platform for ADR to expand

ADR (USD & CC) & year over year ADR % chg, YTD September 2025

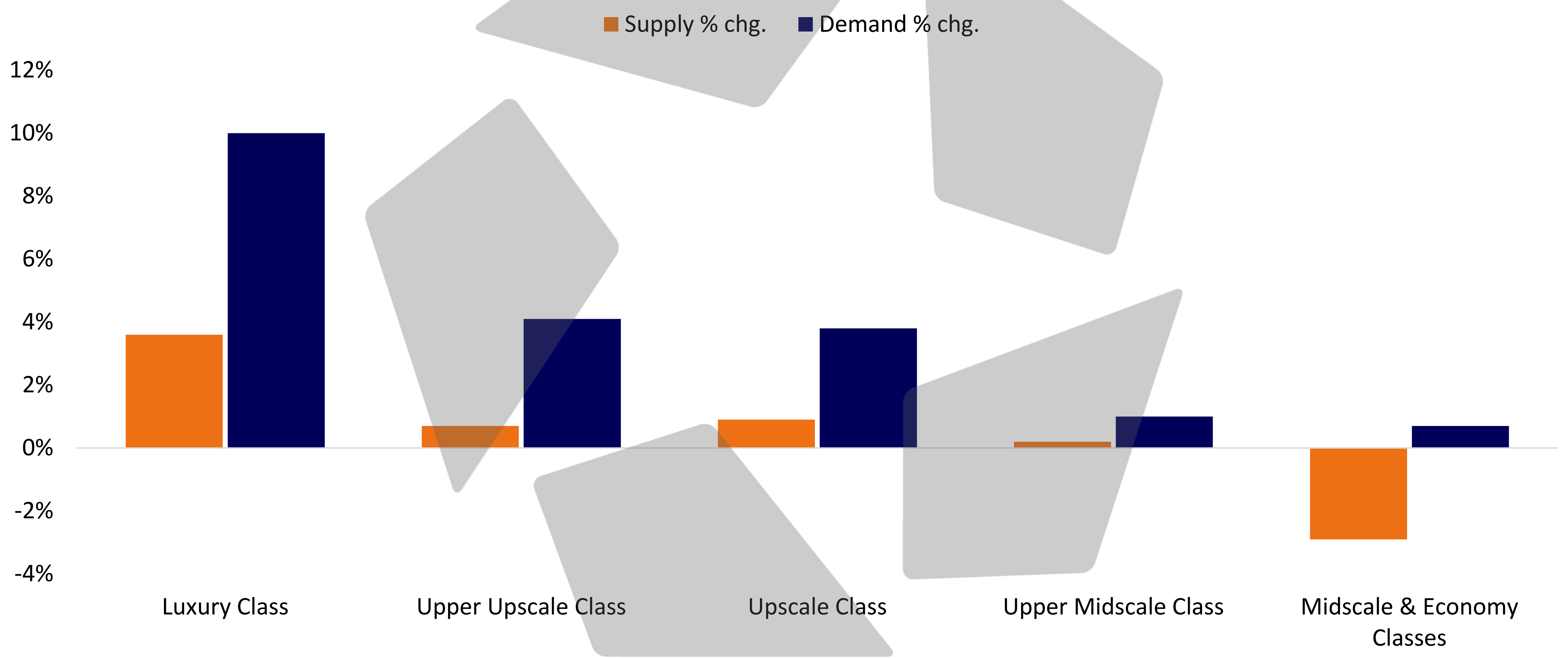


The GCC: supply + demand = Growth

STR CoStar

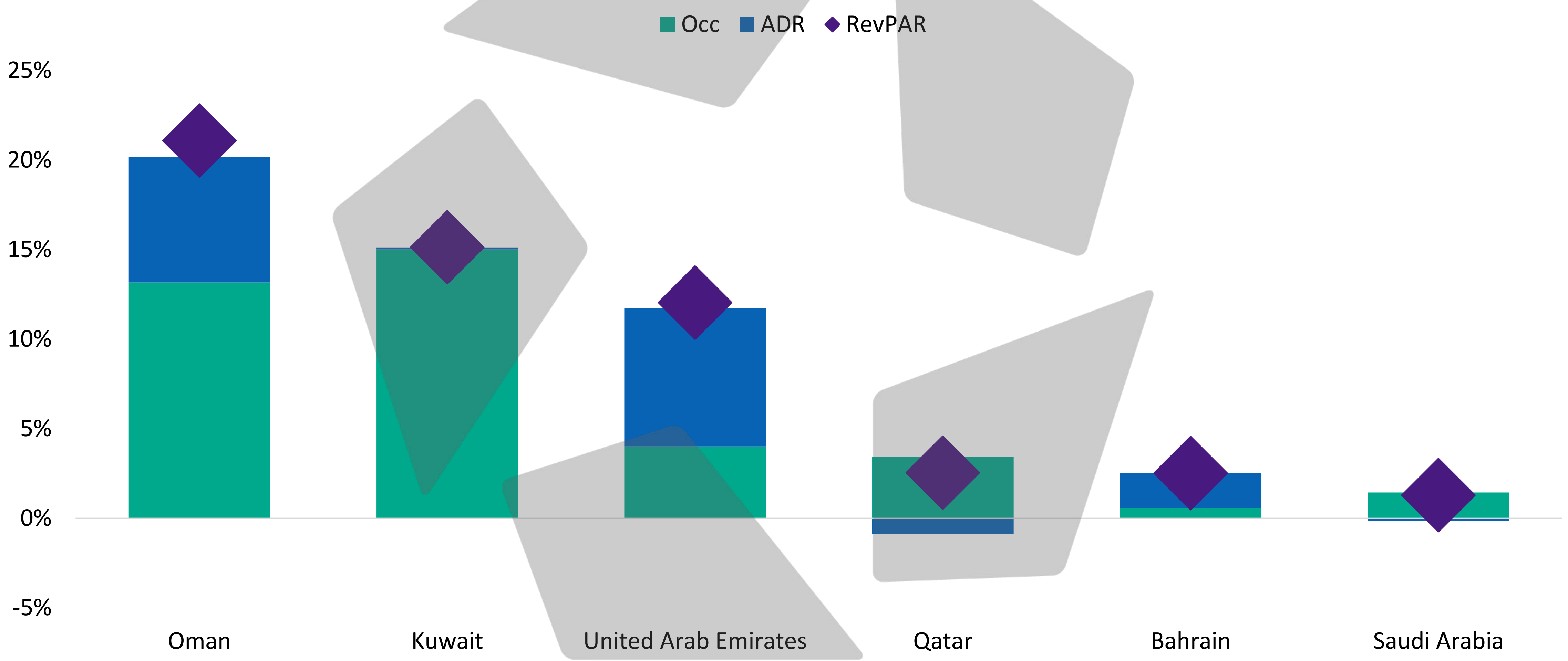
Slower supply growth in 2025 has helped demand growth across the classes

<u>GCC supply and demand % chg.</u> YoY, YTD September 2025



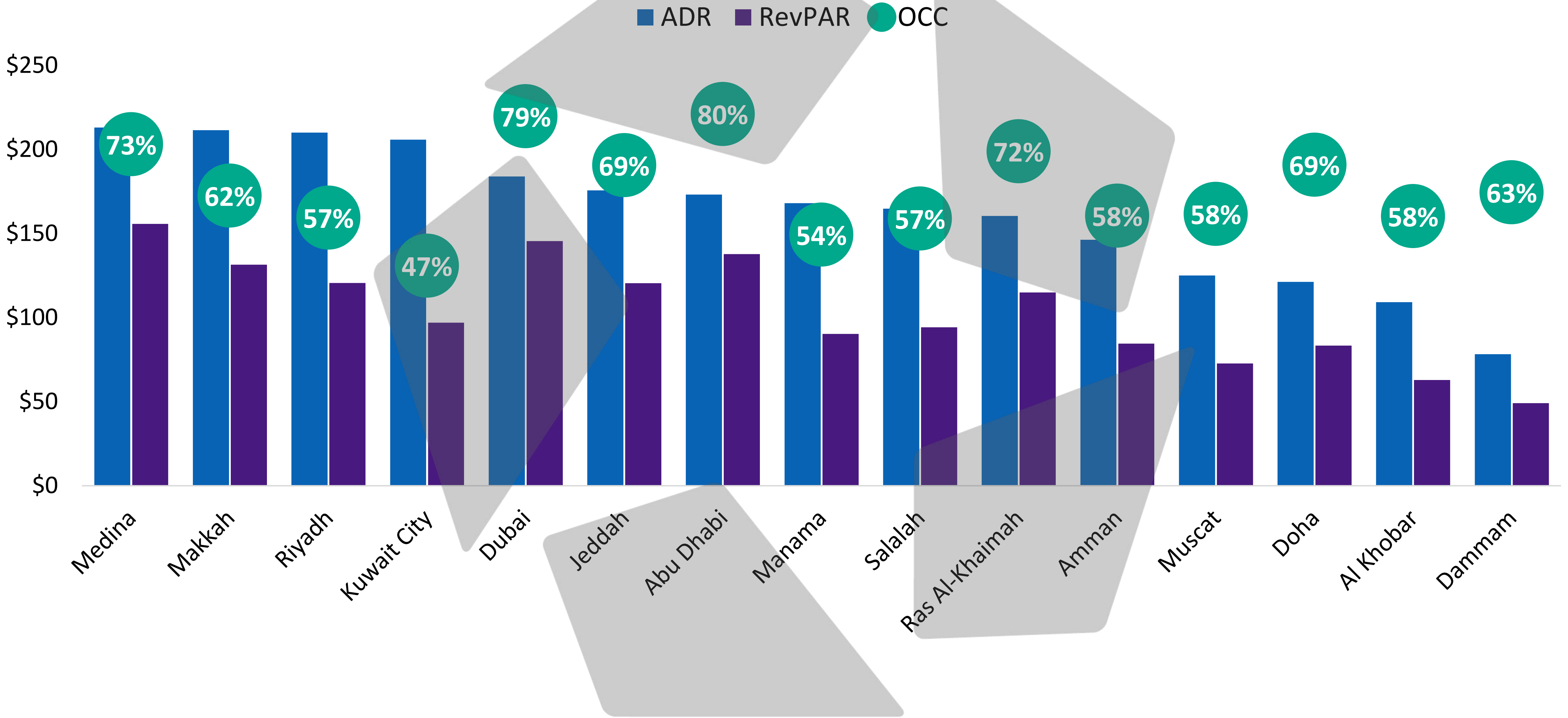
RevPAR growth across the GCC, with Oman, Kuwait & the UAE in double digits

<u>GCC KPI's (local currency) % chg.</u> YoY, YTD September 2025



KSA takes the top 3 ADR spots with less than $3 difference between each city

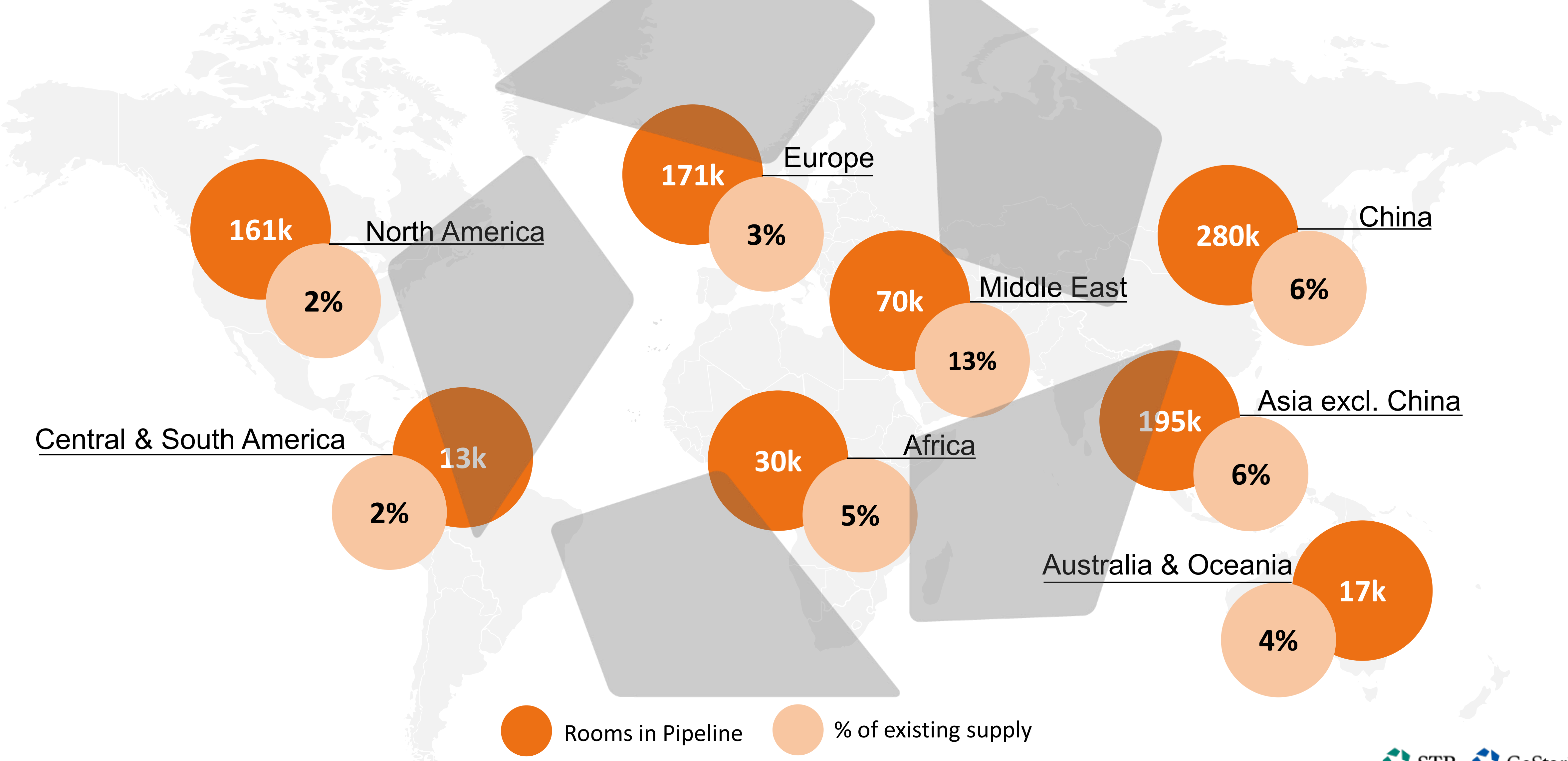
GCC key markets, actual occupancy %, ADR & RevPAR (USD currency), **YTD September 2025**



What does the future hold?

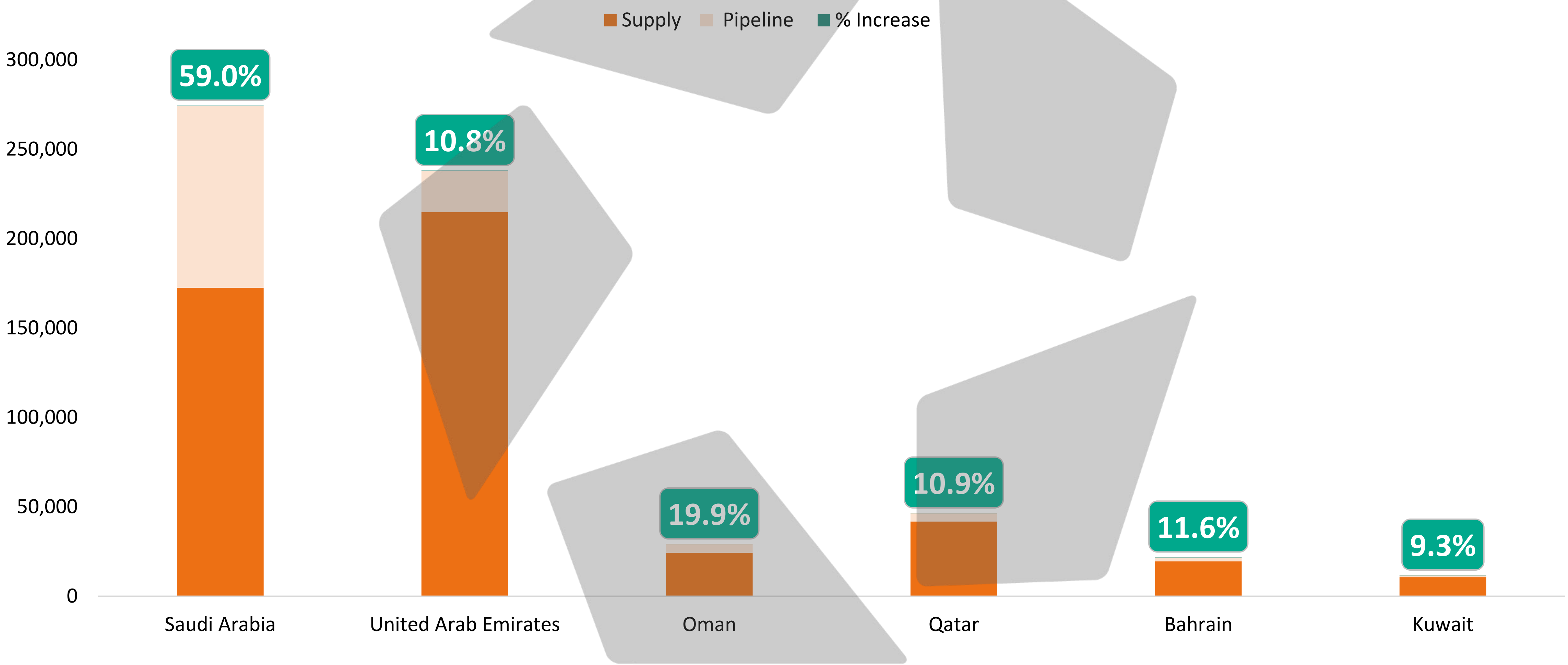
Over 900,000 of those pipeline rooms are under construction – c.39%

Rooms **under construction only** and as % of existing, **October 2025**



Unsurprisingly Saudi Arabia is leading the way with new pipeline in the GCC

<u>GCC Countries pipeline,</u> No. of Rooms as at October 2025



STR CoStar™

Thank You!

Sarah Duignan
Director, Client Relationships
sduignan@str.com