

HOSPITALITY, TOURISM AND LEISURE CONSULTANCY

Middle East and North Africa



FOREWORD

Founded in 1896, today Knight Frank is operating in 50 territories, with 600+ offices, and over 20,000 dedicated staff serving our clients. We are proud to deliver full scale hospitality, tourism and leisure advisory services in the region with our specialised team having successfully advised on a variety of projects over the past 25 years.

Our extensive advisory process and unparalleled attention to detail are what drives our success. We are your partner in every step from conceiving an idea to delivering a project and later overseeing the assets to secure the best return on investment.

Our team brings a blend of operational and consulting expertise, strengthened by deep local insight. With strong analysis and a wealth of knowledge, we consistently deliver high-quality results. Our specialists share a unified vision to create exceptional projects and support sustainable growth across the region.



A stylized, handwritten signature in white ink.

OUSSAMA EL KADIRI, MRICS
Partner – Head of Hospitality, Tourism & Leisure Advisory
Knight Frank MENA



INTRODUCTION

Knight Frank is a recognised market leader in the field of hospitality, leisure and tourism advisory services. Our services are regionally and internationally acknowledged and highly valued by investors, developers, financial institutions and operators. We offer a full range of services from developing a suitable business model to selection of a suitable operator, negotiating lease management, procurement for a project. In order to guarantee the success of any project, we offer in-depth support in the development process.

Decades of experience guarantee the highest standards and reliability concerning our services for hotels as well as tourism and leisure entities. The unique combination of experience and consulting know-how provides the basis for the quality and reliability for which our services are known. We deliver independent and unbiased advice based on realistic assessments.

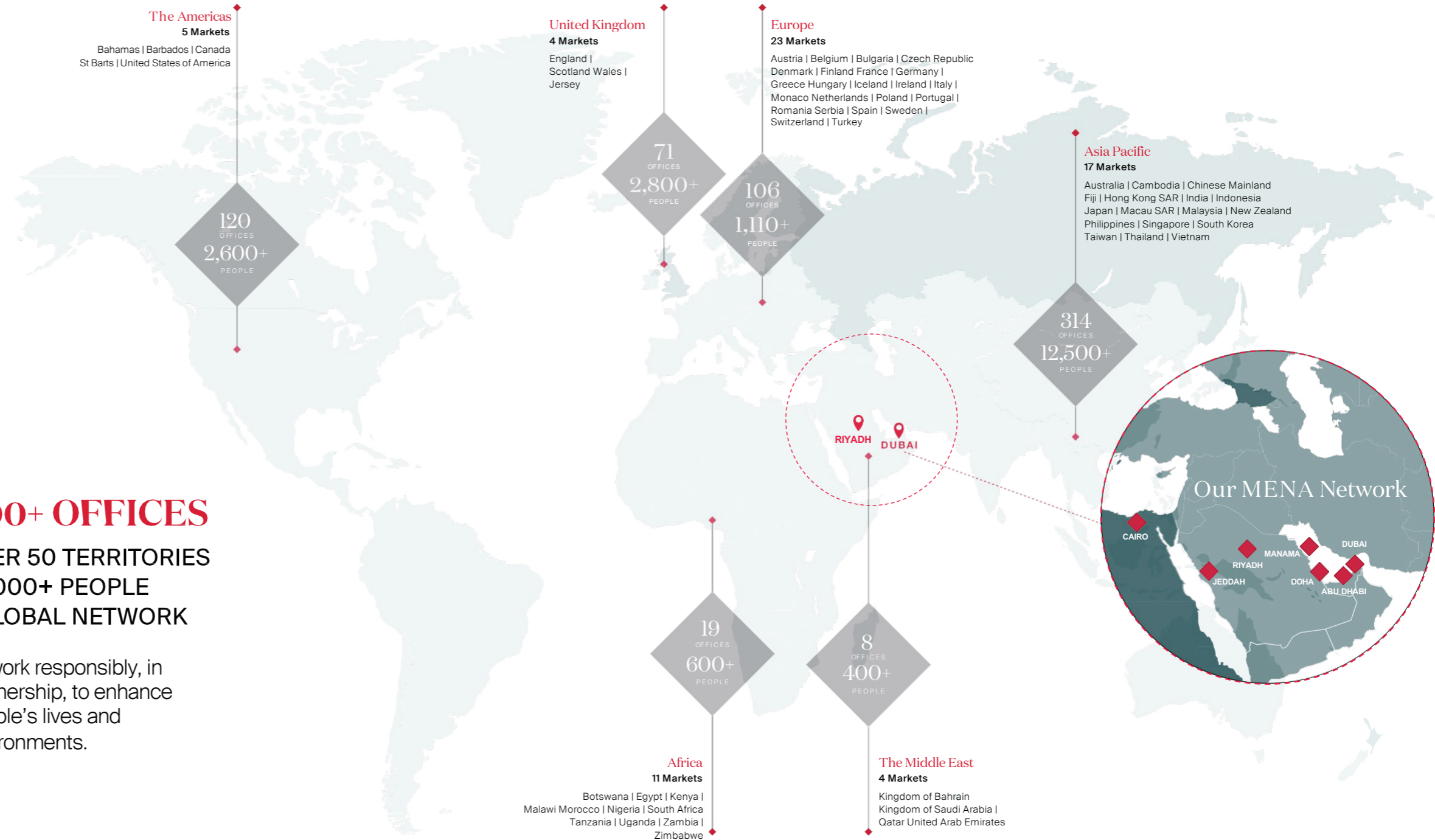
600+ OFFICES

OVER 50 TERRITORIES

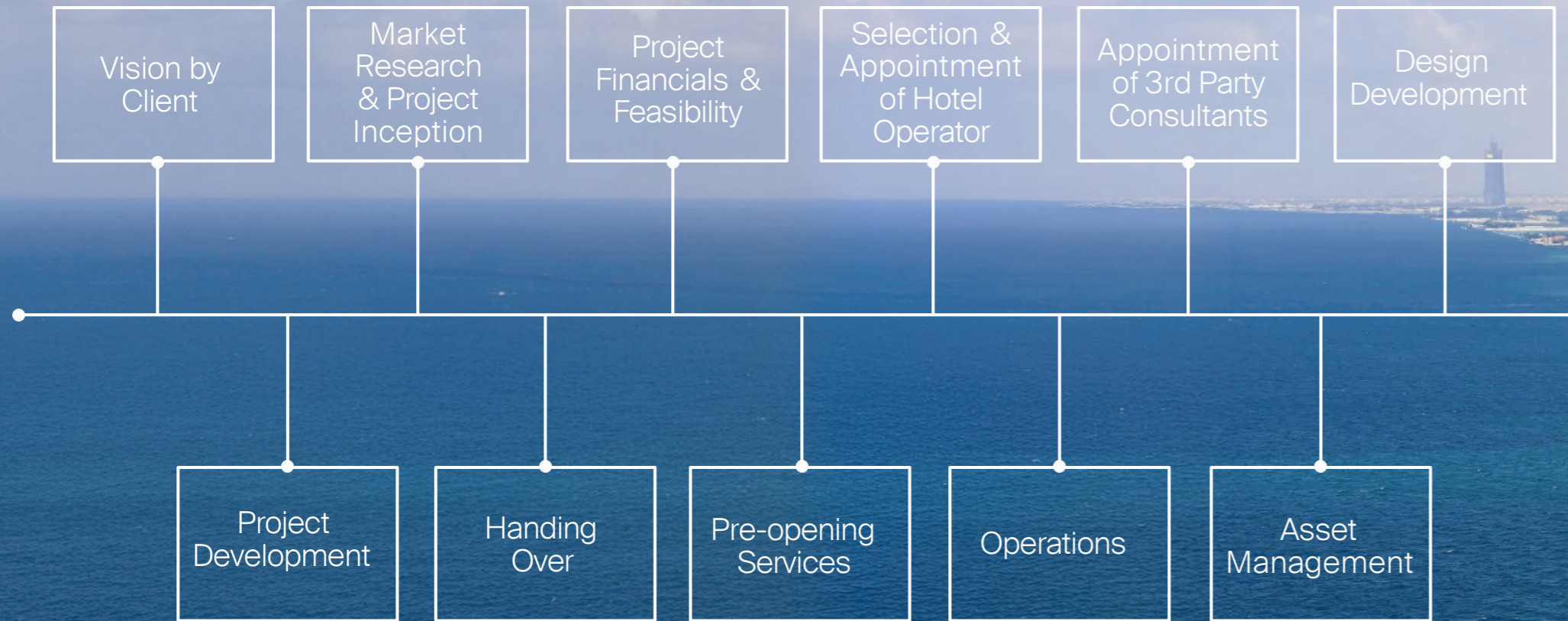
20,000+ PEOPLE

1 GLOBAL NETWORK

To work responsibly, in partnership, to enhance people's lives and environments.



PROJECT LIFECYCLE



SERVICES

We specialise in all aspects of the hospitality, leisure, and tourism sectors, offering a comprehensive portfolio of services. Knight Frank delivers a wide range of advisory solutions to hotel and resort owners, tourism authorities, destination management companies, airlines, and F&B groups. Our expert and pragmatic approach is focused on enhancing feasibility, maximising asset value, and improving overall performance. Some of our key services include:

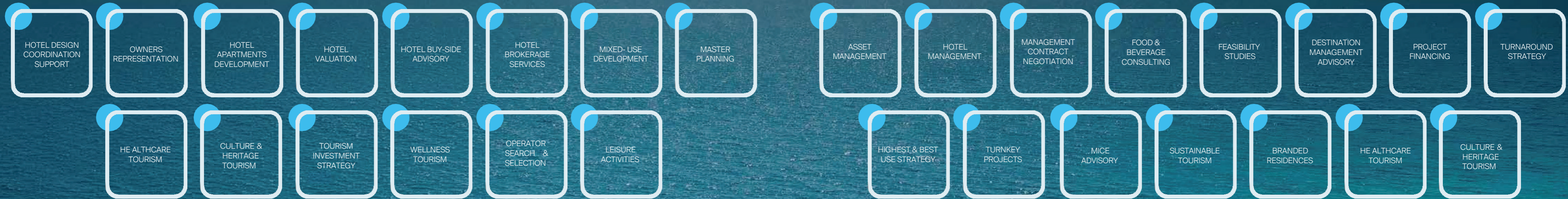
- Tourism Advisory and placemaking strategy
- Development Advisory for mixed-use masterplans and feasibility studies
- Hotel and Branded Residences Operator Search & Selection and contract negotiation services
- Hospitality & Leisure Advisory (Marinas, Leisure, Convention centres etc.)
- Strategic Advisory & repositioning strategy
- Operational turnaround strategy & asset management services
- Development Hotel Technical Support services (Design reviews, OS&E procurement etc.)
- Merger & Acquisitions and Transaction Advisory *
- Appraisals & Valuations*

* In coordination with relevant Knight Frank teams

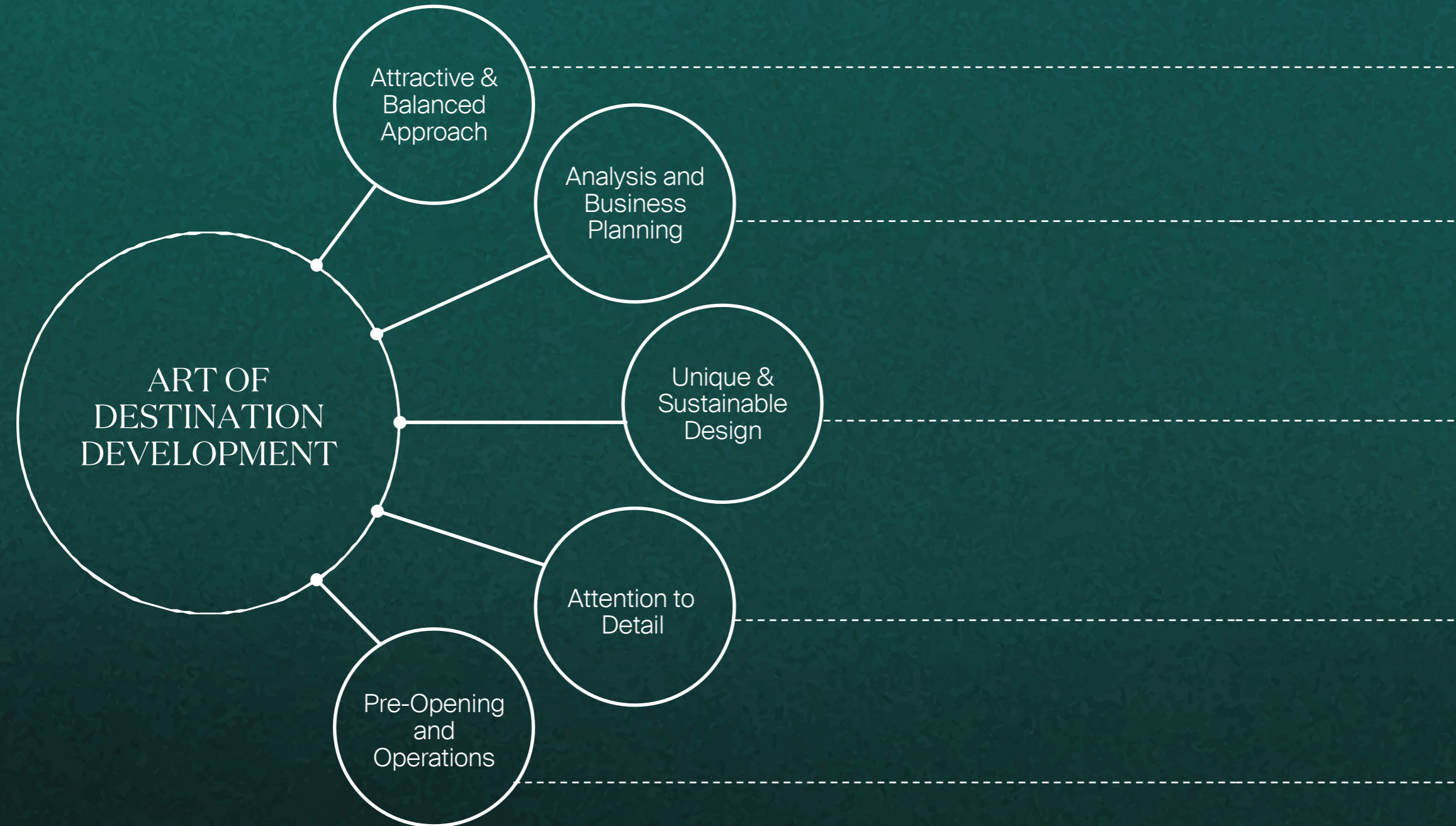


HOSPITALITY, TOURISM & LEISURE ACTIVITIES

Our services span the entire spectrum of the real estate development value chain and our teams have worked across all major asset classes within the hospitality industry.



TOURISM ADVISORY



We believe in positioning the right destination to the right target market and our projects range from mixed-use site development to attracting new markets, bringing footfall and vibrancy to urban regeneration, or leisure led property masterplans and much more.

Knight Frank has a deep understanding of various markets around the globe with vast experience in business analysis and planning to guide the clients and create masterplans that are attractive investment propositions.

Sustainable Tourism is our main focus to benefit the local communities and help the environment. Our Design practices ensure maintaining the highest diligence on sustainable material & practices.

Overseeing the project from inception and completion is what we are specialised in with our multidisciplinary in-house team that ensures the highest levels of quality in execution.

With over 100 years of combined experience in hospitality and tourism management and operational experience, we possess the expertise required for pre-opening phases and overseeing operations.

STRATEGIC ADVISORY

Knight Frank's world class advisory results in quality business models. Our advisory specialists assist in maximising profit, minimising risk and enhancing the management of company assets. We have the expertise to deliver strategic tourism, leisure and hospitality advisory services for smaller one-off assignments to large-scale, highly specialised projects.

Our international reach, scope of services and dedication to achieving the best results ensure that our clients gain a competitive advantage. Quality advice leads to quality decisions and with rapid market change, hoteliers and owners must adapt and adjust their strategies. Our clients require flexible, reliable and increasingly sophisticated hotel real estate solutions. They choose us because of our reputation for consultation and our customer-centric approach, and because we offer a comprehensive suite of hotel advisory services.



Destination & Tourism
Strategic Advisory



Feasibility Study



Repositioning
strategy



Operational
development
strategy



Buy-side Advisory



Masterplan tourism and
hospitality strategy



OPERATOR SEARCH & SELECTION

Selecting the right hotel operator is essential to the long-term success of any hospitality asset. We leverage strong global operator relationships, deep market insight and commercial expertise to match each project with a brand whose standards and operating model align with its vision. Our focus is to secure both the right operator and the right commercial terms, safeguarding the owner's interests throughout the appointment process.

1. Brand Strategy & Shortlisting

- Identify brands aligned with the project vision, concept and target market.
- Prepare an initial list of potential brands and agree the shortlist with the client.
- Develop operator briefing materials.

2. Operator Engagement & Evaluation

- Engage shortlisted operators and request LOIs and supporting documents.
- Evaluate proposals using a clear technical and commercial assessment framework.
- Coordinate workshops and presentations to support decision-making.

3. Commercial Negotiation & Appointment

- Support negotiations of MOUs with preferred operators.
- Lead the negotiation of the Hotel Management Agreement (HMA).
- Ensure alignment between brand standards, development requirements and investment objectives.



LEISURE ADVISORY

With more than half a century of combined team experience in creating opportunities and overcoming challenges for owners, investors and developers, Knight Frank optimises the broad spectrum of issues related to the hospitality industry. Our senior management team, have the inherent ability to grasp the business and leisure climate of any market or asset, driving top-line revenues in all segments to achieve optimum profitability.

We understand hotels with complex operations and multiple revenue streams, and we have significant experience in managing these assets with a shared focus on guest service, profitability and return to investors. When opening a new hotel or repositioning an existing operation, the questions are almost always the same. Whether you are an experienced operator or a novice restaurateur, through our hospitality advisory services specialising in hotels, restaurants, spas, food and beverage operations, we can help in recognising the challenges of running a successful operation by performing frequent examinations and performance audits performed by professional consultants.

Some of our services include but are not limited to:



Specialised wellness developments



Strategic reviews / operations



Leisure (Marinas, Golf, Equestrian etc.)



Market Research



Member clubs



Branding (Developing & Launching New Brands)



Operator screening & negotiations



Spa & Wellness Services & Development



ASSET MANAGEMENT

We act as the owner's representative, providing tailored asset management solutions aligned with your ultimate goals – whether that's maximizing asset value, ensuring operational excellence, maintaining the property to the highest standards, or achieving strong guest satisfaction scores.

We deliver pragmatic, results-oriented advisory services to hotel owners and lenders, drawing on extensive operational experience, international best practices, and deep local market knowledge. Our role is to mitigate risk, uphold quality, and drive strategic performance across your hospitality portfolio. With a strong background in both ownership and hotel operations, our team brings the insight and hands-on expertise required to enhance the overall return on investment. We offer a full-service, high-engagement hospitality advisory model that focuses on achieving your strategic objectives and improving profitability.



Budgeting



Performance
Optimisation



Cost analysis
per department



Segmentation
analysis



Forecast review



Calculation of
operator's fees



Pre-opening
management



Capex review and
assessment



Pre-opening
Management



PRE-OPENING SERVICES

Knight Frank's Pre-Opening Services ensure a seamless transition from construction completion to the opening of the hotel. Our team provides meticulous planning and coordination to prepare your hotel for its debut, addressing every detail that contributes to a successful launch. We intervene in staffing, training, operational setup, and marketing activations, ensuring that every aspect of the hotel is polished and ready for guests.

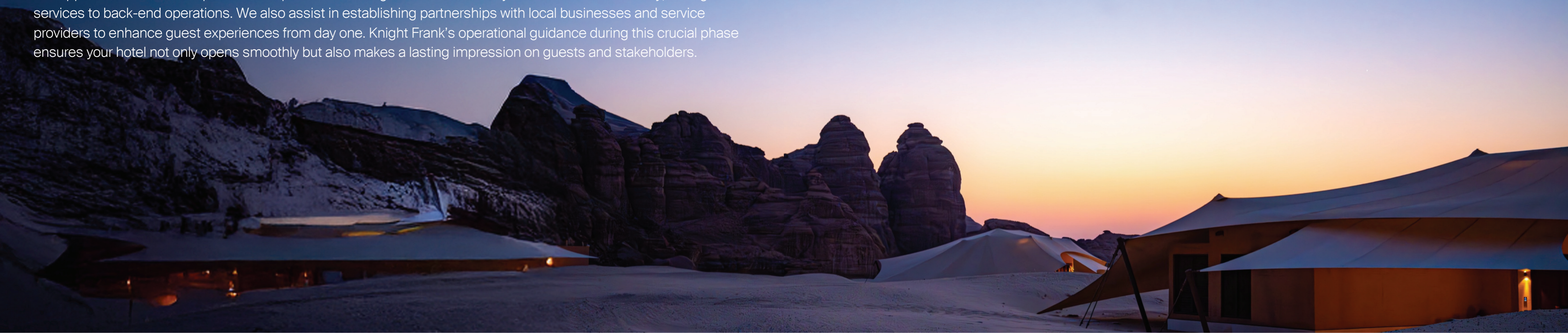
Our approach includes comprehensive operational testing to ensure that all systems function flawlessly, from guest services to back-end operations. We also assist in establishing partnerships with local businesses and service providers to enhance guest experiences from day one. Knight Frank's operational guidance during this crucial phase ensures your hotel not only opens smoothly but also makes a lasting impression on guests and stakeholders.

1 | Handover / Taker over to Operator

2 | HR Support

3 | Marketing Plan Review

4 | Budget Review



OUR TEAM

Driven by unmatched experience and passion for innovation, our team of experts guarantees your hospitality venture starts and operates at its best. We comprise a team of well-rounded professionals with expertise in hospitality, operation management, franchise management, business development, procurement and asset management that has managed positions across multi international hospitality consultancy firms not only in the region but also around the globe.



Oussama El Kadiri, MRICS

Partner - Head of Hospitality, Tourism and Leisure Advisory, MENA

With extensive experience in real estate and hospitality management in Europe, the Middle East and North Africa, Oussama oversees Knight Frank's dedicated consultancy for hospitality, leisure and tourism.

He previously headed hotel development in the Middle East for international operators such as Accor, as well as Radisson Hotel Group. Oussama's real estate and hospitality consulting experience spans multiple markets within the EMEA region. Whilst he is a hospitality specialist, Oussama has also worked with other asset classes including residential, retail, entertainment and MICE, as part of his consultancy for mixed-use projects. He has been involved on multiple tourism and hospitality developments across the MENA Region.



Javad Hajiyev

Associate Partner – Hospitality, Tourism and Leisure Advisory, MENA

Javad brings strong experience in hospitality management and real estate across the region. He supports Knight Frank's hospitality advisory work, drawing on both operational and consultancy-led expertise.

He began his career in hotel operations before moving into international real estate consultancy, advising on hospitality developments and operator selection. At Aldar, one of the region's leading real estate developers, he strengthened his skills in asset management and investment, managing hotels, golf clubs, beach clubs and marinas across multiple markets. His responsibilities covered operator engagement, performance reviews, budgeting and long-term planning. Javad's combined operational, advisory and ownership-side experience enables him to deliver grounded, commercially focused hospitality advice.



Nader Batniji

Associate Partner – Hospitality, Tourism and Leisure Advisory, MENA

Nader is a seasoned hospitality executive with over 25 years of experience across luxury and upscale hotels in the Middle East. He has held senior leadership roles with leading international brands, including Marriott, Hyatt, IHG, Radisson, Rotana, Millennium, and Seibu Prince Hotels & Resorts.

Currently serving as Regional Operations Manager – Middle East at Seibu Prince Hotels & Resorts, he oversees multi-property operations, focusing on service excellence, brand compliance, and commercial performance. Previously, as General Manager of Copthorne Hotel Sharjah, he led full hotel operations, enhancing profitability, guest experience, and operational alignment. With a strong background in operations, commercial strategy, and general management, Nader brings a holistic, owner-focused perspective to the hotel value chain.

OUR MIDDLE EAST & NORTH AFRICA INTEGRATED SERVICES

Commercial Transactional Services

Capital & Debt Advisory
Capital Markets
Data Centres
Hotel & Leisure Capital Markets
Industrial & Logistics
Land Sales
Occupier Strategy & Solutions
Offices

Residential Transactional Services

Exclusive Project Sales
Interior Services
KSA Residential
Mortgage Advisory
Private Capital & Family Enterprises
Prime Residential, UAE
Private Office
Qatar Residential

Consulting Services

Education Consultancy
ESG Consultancy
Food & Beverage Consultancy
Healthcare Consultancy
Hospitality, Leisure & Tourism Advisory
PPP & Deal Advisory
Real Estate Consultancy
Research, Economics & Geospatial
Residential Consultancy
Retail Advisory

Valuation & Advisory Services

Commercial Valuation & Advisory
Hospitality Valuation
Plant & Machinery Valuation
Residential Valuation

Project & Development Services

Building Consultancy
Cost Management Fit
Out Management
Programme Management

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LOCALLY EXPERT, GLOBALLY CONNECTED

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