

A central graphic of a square chip with a brain icon on top, surrounded by a complex circuit board pattern. The chip has the letters 'AI' inside the brain icon.

A HUMAN-POWERED, TECH-ENABLED FUTURE:

AI ADOPTION IN THE HOSPITALITY INDUSTRY

09/2024

WELCOME

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EXECUTIVE SUMMARY

In the months leading up to August 2024, Katch and Keane collaborated to examine the potential impact of emerging technology on hospitality investment in the Middle East.

Boasting over three decades of combined experience in the realm of hospitality, F&B, and PR in the GCC, Katch International and Keane MEA are proven industry leaders, consistently looking to stay ahead in a rapidly changing market. Leveraging years of deep industry knowledge, the two agencies collaborated on this White Paper to uncover the impact of emerging Artificial Intelligence (AI) and advanced technologies, and their potential to shape the future of the hospitality industry.

Having worked across an extensive portfolio of clients since inception, both agencies have been at the forefront of the hospitality and F&B industry. Using their expertise, this report aims to map the landscape of technology adoption and innovation by hospitality leaders in the region in 2024, and sets the agenda for AI adoption in years to come.

Extensive interviews with senior hospitality leaders revealed that:

- Despite clear benefits to quantitative research, machine learning cannot replace the human-centric approach essential to investment success in the rapidly evolving hospitality industry.
- In a developing market such as the middle east, region-specific contextual knowledge and strong cross-departmental relationships are still two of the most important elements to investment success.
- This has been coined a ‘triad of intelligence’; an interplay between artificial intelligence, emotional intelligence, and relationship intelligence.
- Taken together, the results show that while AI offers powerful tools for data analysis and decision-making in the hospitality industry, its effectiveness will ultimately depend on how well it is integrated with human expertise and contextual understanding.

SAUDI ARABIA IS
PROJECTED TO HAVE

320,000

NEW HOTEL ROOMS
BY 2030 ACROSS THE COUNTRY

This expansion will boost the nation's travel and tourism industry, which is central to achieving the government's goal of tourism contributing 10 percent to the economy by 2030.

TO ACCOMMODATE
AN INFLUX OF

150 M

DOMESTIC & INTERNATIONAL
TOURISTS ANNUALLY

according to a [report](#) by global
property consultancy Knight Frank.

These ambitious figures pose an opportunity for investors in hospitality sites in the region, but also two key challenges; how to uncover which sites hold the most potential, and meeting increasingly high guest expectations, at scale.

Worldwide, hoteliers are investing in digital and emerging technologies. A survey by Amadeus Hospitality revealed that on average,

HOTELIERS ARE PLANNING A

16%

INCREASE IN TECHNOLOGY
INVESTMENT IN THE NEXT

12 MOs

This investment was in areas including digital media, distribution capabilities, data analytics, and Artificial Intelligence (AI). Globally, almost all hoteliers (98%) recognise that AI has the potential to bring significant benefits to their businesses. And a recent [statistic](#) predicted that the impact of generative AI upon the travel industry would be only just behind banking and tech.

SO WHAT IS THE REALITY OF EMERGING TECH USE IN HOTEL INVESTMENT ACROSS THE MIDDLE EAST? AND HOW WILL DIGITAL TRANSFORM THE INDUSTRY IN THIS FAST-GROWING, CULTURALLY VAST, AND WIDELY VARIABLE REGION?

In our interviews and focus groups with executives representing investors, major hotel brands, operators, and owners — as well as AI consultants and marketing experts — we uncovered a road map for a human-powered, tech-enabled future in hospitality. Here's what they told us:

01

Investors, hoteliers, and restaurateurs increasingly use AI technology for interpreting

- ✓ DATA
- ✓ REVENUE MANAGEMENT
- ✓ MARKETING
- ✓ SUSTAINABILITY
- ✓ LOCATION OPTIMISATION
- ✓ INCREASING TRAFFIC
- ✓ ANALYSING GUEST BEHAVIOUR DATA

02

Although industry professionals understand the potential for new technologies to transform the industry, they *cannot replace* the **essential human-centric approach, contextual knowledge, and “gut instinct”**

03

AI-driven processes are predicted to be used increasingly in the industry to mechanise specific roles and optimise back end operations, but new training and roles will be required for humans to oversee these

04

There remain challenges to using AI; a lack of expertise in human resource/training, data protection, market specificity, a growing trend for authenticity, and nuances of cultural context

THE INTERVIEWS DISCLOSED AN INTERPLAY BETWEEN THREE DIFFERENT TYPES OF INTELLIGENCE



Caption: Our interviews showed that an overlap between these three elements is key to investment success.

ARTIFICIAL INTELLIGENCE

A DEEP DIVE INTO TECH-POWERED HOSPITALITY INVESTMENTS AND OPERATIONS WITHIN THE MIDDLE EAST.

MACHINE LEARNING IN A HUMAN INDUSTRY.

Investors and professionals in the hospitality industry are increasingly incorporating emerging technology such as AI and VR into their business operations. AI is a concept with many applications, such as machine learning, generative AI, and predictive modelling.

Within this paper, AI refers to the use of artificial intelligence such as data processing software - rather than human intelligence - to process information.





Ben Baseley-Walker of Andart Global, Consultant on Giga projects in KSA defines AI as **“the capability of a system to alter its decisions based on the data it receives.”** Rather than repeating, these systems take on new information and adjust its actions or outputs accordingly. Unlike traditional systems that repetitively perform the same task, AI has the ability to assimilate new information and adjust its actions accordingly.

Fundamentally for hospitality investments, AI can be leveraged in the decision-making process, to gather as much data as possible, understand causality within that data, and use it strategically.

Baseley-Walker goes on to explain that **“AI excels in handling vast amounts of data, distilling it, and deriving an accurate solution.”** This is an incredibly powerful tool from a hospitality investment perspective, as AI can compile information from millions of sources - rather than the average of 20-40 hotels that a human analyst might be able to review.

As Quentin Reyes, founder of Hyperfusion points out;

“AI CAN PERFORM COMPLEX SENSITIVITY ANALYSES AND UNCOVER PATTERNS THAT HUMANS MIGHT NEVER CONSIDER, EVEN IN SITUATIONS THEY’VE NEVER ENCOUNTERED BEFORE, BY DRAWING ON THE CLOSEST PARALLELS FROM PAST EXPERIENCES.”

As well as mining multiple data sources, using a machine to support quantitative investment decisions can reduce human bias from personal experience and social conditioning. Reyes provides an example; **“an analyst might dismiss a hotel investment opportunity simply because of a personal negative experience in that city.”** In finance particularly, biases can be problematic and AI can help **“level the playing field by providing objective analysis”**, making it particularly useful for investors.

AI also enables investors to move more quickly on decisions. Quicker data processing means faster decision processing, which gives investors, in the words of Lokesh Kumar, VP of Development Middle East for Minor Hotels, **“first mover advantage”**, enabling investors to move more quickly - and importantly - more intelligently on an investment decision rather than **“waiting and watching to see whether or not that particular location will become successful.”**

As one Director of Asset Management for a large real estate development and management company summarised; **“The better the data, the better the decisions; the better your service, the better your execution.”**

It's clear that AI holds the potential to revolutionise the hospitality industry, but are senior professionals actually making use of this tool?

Across Middle East economies - the UAE, Saudi Arabia and Qatar in particular - there has been a strong commitment to AI adoption, supported by governments. In a report of potential contribution to GDP by regions by 20230, [PWC](#) showed that gulf economies were only behind China and North America.

However when it comes to hospitality, Jonathan Worsley, CEO of hospitality B2B event forum The Bench, told us that

“MANY BUSINESSES ARE STILL IN THE PROCESS OF LEARNING AND TRYING TO DECIPHER WHAT AI'S RAPID EVOLUTION MEANS FOR THEM.”

As throughout history with new technological adoption comes **“initial excitement”**, but **“when it comes to making substantial investments, there's often a hesitation, particularly in larger corporations.”**



Amit Nayak, Vice President and Executive Board Member at HAMA MEAA, said they currently incorporate AI in their decision-making process for **“everything from hotel investments, based on industry demands and trends, to managing revenue.”**

From an operational perspective, AI systems pose an opportunity to enhance guest engagement by learning from past experience and offering personalisation accordingly. Nayak’s team integrates AI tools like Google Guard and ChatGPT to enhance operations and guest experiences, for example, playing an advertisement on the TV of the guest’s room, which is tailored to their interests. As Nitin Thariyan of Lean on Data explains;

“DATA HELPS ORCHESTRATE THE GUEST JOURNEY THROUGH HYPER PERSONALISATION.”

LOCATION, LOCATION, LOCATION

AI platforms are increasingly being harnessed to identify the next optimal location. Othmane Zrikem, founding Partner at VDD.ai told us that his platform offers AI-driven insights, which **“help pinpoint potential locations by evaluating market demand, local competition, and customer demographics.”**

This location optimisation is key to investment success for new sites in the region. As Uday Mukundan, Chief Executive Officer at The Food District Company told us;

“IN THE KSA MARKET, WHICH IS VAST AND DIVERSE, I NEED TO DETERMINE IF MY PRODUCT FITS WITHIN THIS SPACE. THIS INVOLVES EXAMINING THE PRODUCT’S VIABILITY, GROWTH POTENTIAL, MARKET TRENDS, AND CONSUMER BASE.”

AI systems are key to processing this information, as AI-driven data reports can **“significantly reduce errors and eliminate emotional biases from decision-making.”**



A growing area capitalising on AI systems is the cross validation of feasibility studies, run by master developers to drive interest and then validated by asset owners or hospitality brands with their own survey. One anonymous Giga project consultant explained that **“AI will enable processes to be faster, more accurate, and more robust as access to wider data becomes easier and cheaper.”**

In the words of entrepreneur Basma Elkhareiji “it’s all about the data.” To support the decision-making process for which sites to invest in for her restaurant group, We Are Social, she utilises advanced software systems, which enable her team to analyse various factors; including how individual dishes perform, peak dining hours, and sales trends. For Elkhareiji, this is “where AI shines”, particularly for a serial entrepreneur in control of multiple restaurants and brands, as it **“allows for an overview of customer habits across all establishments.”**

AI systems are built on data, which is becoming richer and deeply complex. From TripAdvisor reviews to TikTok posts, AI systems used by hospitality have a wealth of potential information at their digital fingertips. In this way, AI will **“act as a catalyst”**, as Kumar told us. For one consultant, this wealth of data through online reviews represented the real impact on data modelling: **“Previously we modelled off of historical spend and usage data...this is almost a psychographic variable.”**

A willingness to harness emerging technologies is an important factor to investors when analysing which sites or entities to invest in within a particular market. When processing information to arrive at an investment decision, Mukundan told us that he looks for entities to possess **“a readiness to adapt and innovate, which is a strong indicator of potential success in a rapidly evolving market.”**

This point was supported by Thariyan, who expressed that

“HOTELS THAT ALLOW AI TO DRIVE THEIR DYNAMIC PRICING PERFORM SIGNIFICANTLY BETTER THAN HOTELS WHO RELY ON HUMAN INSTINCT.”



In the Middle East increasingly 'green' developments are provided with financial benefits, rightly making sustainability a priority for any hospitality investors in the region. But how can - and does - technology currently support this shift to more planet-conscious processes

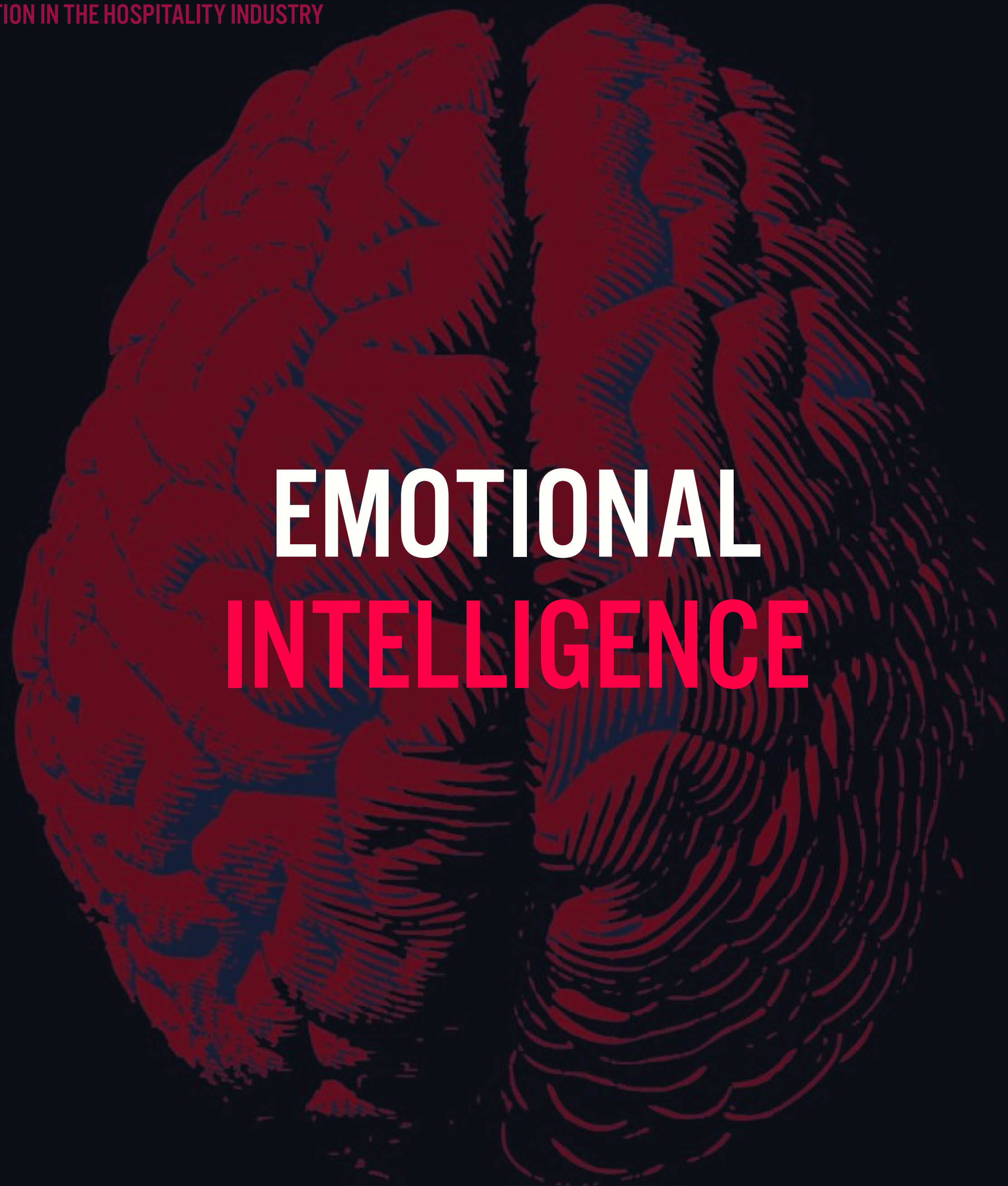
Anastasios Nychas, Hospitality and Food Consultant and the Founder of Neat Burger & Future Food Co. thinks that AI technology will be instrumental in reducing food waste, **“by providing insights and solutions that streamline the entire process from suppliers to the end-user.”** For example, AI processes can plan menu items that can be used across multiple dishes, reducing the need to order ingredients for just one dish. AI-driven management tools have “revolutionised” how Nychas manages energy consumption within his restaurant chain with smart systems that can control lighting and heating ensuring that these resources are used only when necessary. The real benefit of machine learning is the marginal gains it can provide on a large scale. In Neat Burger, Nychas can “fine-tune” extraction systems and kitchen equipment, such as fryers, to operate at optimal levels, avoiding unnecessary energy expenditure.

An aptitude for and willingness to adopt AI into business processes and process information is clearly important now, but will the uses of this technology evolve like its users? Our interviews told us that they believed in the future AI would be used to make large scale data scraping. For example, if a new investment is targeting a particular demographic or country-specific audience they can use AI to do a global scrape and summarise what that audience is saying they want, or are missing from most hotel stays. Take the case of an investment being made with a Chinese or Indian audience in mind, AI can do a global trawl of what Chinese or global travellers are saying around the world.

The future of AI in hospitality investment will be simple: more data, more of the time, to give investors more time. As one Asset Manager told us anonymously;

“NOW WE SPEND MORE TIME WORKING OUT WHAT WE NEED TO DO THAN DOING IT. THE SHIFT WILL BE TO SPEND MORE TIME DOING AND LESS TIME WORKING OUT WHAT TO DO.”





EMOTIONAL INTELLIGENCE

Our interviews told us that AI can scrape huge amounts of data, speed up information processing, and objectively provide clear pathways for investment. More importantly though, it relies on good input and on clear data. AI makes assumptions, not ideas. Even generative AI tools cannot nuance, think ahead, or provide new concepts; essential skills for investors and professionals in the hospitality industry.

Thariyan summarises this interplay succinctly:

“AI IS BETTER AT DEALING WITH VAST AMOUNTS OF DATA. HUMANS ARE BETTER AT ANYTHING THAT REQUIRES NEW THINKING.”

The enduring value of human - or emotional - intelligence was a clear theme running through our interviews, with many explaining that human intervention was being applied to data or conclusions made by AI for investment success.

As Reyes of Hyperfusion points out;

“AI CAN MIMIC UNDERSTANDING BY USING LARGE SETS OF DATA TO IDENTIFY PATTERNS, BUT IT LACKS TRUE COMPREHENSION WITHOUT THE CONTEXT PROVIDED BY HUMAN GUIDANCE.”

Elkhereiji uses AI such as PowerBI and SevenRooms to provide data and generate business plans, but ultimately for her, **“following my gut feeling is a key part in any decision I make...the physical space and its ambience are aspects that AI cannot fully appreciate.”**

The value of human intuition informed by experience was also supported by John Lossaso, CEO of FAS Hotels, whose decision-making process - whilst supported by technology, revenue indicators, and SDR data - is led by a **“clear vision on what we want to build and design when it comes to the local market”** as well as contextual factors. For example, if Lossaso wanted to open a Nikki Beach Resort, even if it was “booming” in Dubai, it may fail in KSA. He explains; **“there could be many factors. It could be the location is not correct, or the dynamics of the culture don’t work.”**



For Lossaso, design is an area where AI can pay dividends, as it's a costly exercise and an AI system can help owners come to a decision through data input of geography, culture, and location, rather than a human designer's interpretation. As he explains: **“if a designer has never seen Jeddah and never been to Jeddah, how would one understand what the true culture is? What are you trying to attract? How are you going to attract that clientele to come? So from a design point of view, in my opinion, it's very important that they need to understand the locality.”**

As Nayak summarises, AI can generate effective strategies from design to investment, but

“THE HUMAN TOUCH IS ESSENTIAL TO FINE-TUNING THESE STRATEGIES TO SUIT SPECIFIC CONTEXTS AND AUDIENCES.”

This human touch - or emotional intelligence - can be supported by human-powered events such as investment forums, particularly in a specialised market like the Middle East. As Worsley of The Bench indicates;

“PEOPLE WANT TO SHAKE HANDS AND HAVE DIRECT ACCESS TO THOSE THEY DEAL WITH.”

To create effective strategies and predict scenarios, AI needs clear data - and lots of it. This isn't always possible. As Mukundan stated; **“machine learning hasn't yet mastered all scenarios.”** His final decisions always come down to **“a blend of AI insights and human judgement.”**

Importantly from an investment perspective, the machine is only as good as its programming; or its data input. The last thing an investor wants is to be provided the same solution repeatedly, or “deal fatigue”, as Zrikem of VDD.ai calls it. In a volatile, fast-growing market, it pays to be creative and provide new solutions. As he says; **“continuously seeking fresh insights from knowledgeable professionals can help maintain a dynamic and forward-thinking approach to hotel investments.”**

Worsley provides a useful example of how the machine is only as insightful as the human controlling it: “Take, for instance, one of our client's approach to asset valuation. He's developed a sophisticated tool that uses an algorithm based on rules he's defined. While this tool is highly effective in estimating property values by analysing various parameters, it's ultimately an extension of his expertise. This is what informs the rules and parameters that the AI operates within.”

A consultant on a Giga project sees the future of AI with human intervention as a relationship between science and art; **“the science will be easier to source, but the art will still be how to turn it into what I need...the block of marble will be easier to source, but we still have to chip away to find the statue underneath.”**



A HUMAN TOUCH

As in many industries from retail to screenwriting, with the introduction of AI comes the fear of job losses. From an investment perspective, and in the wider hospitality industry, our interviews showed that AI would cause a transference of human roles, particularly in the ‘back end’, where as Kumar points out there is **“no human interference.”**

Mukundan envisions this as a shift for very **“specific tasks, such as budgeting, into AI-driven processes,”** and coupled with VR, technology could also impact sales and training departments.

Human training is a key element in the successful incorporation of AI into hospitality businesses. Zrikem of VDD.ai describes insufficient training in technology as a “significant hurdle”, as setbacks in the workforce can limit progress, rather than hiring or training people to **“effectively implement and execute these technological changes.”**

Hospitality will always remain “a people business”, as one interviewee told us, so it is unlikely that AI, robots or VR will replace humans on front desks anytime soon. New roles will be created to oversee technological systems and development and provide the emotional intelligence needed for investment success. As Mukundan predicts;

“NEW POSITIONS WILL EMERGE TO MANAGE AND VERIFY THE OUTPUTS OF THESE AI PROGRAMMES.”

Posing a more skilled, exciting opportunity for both employees and investors.

Khaled Sarhan, the Managing Director of Ishraqah for Development Ltd., sees it less as AI replacing humans, and more as **“creating AI that will help humans.”**

As the industry increasingly adopts new technologies, investors have a responsibility to the human workforce: decide whether to re-skill, redeploy or invest manpower elsewhere, as hospitality is only at the start of its journey into innovation.



FUTURE PROOFING

The potential for technology - particularly AI - to optimise the hospitality industry is enormous, but as with any industry navigating technological advancement, there remain setbacks.

From an investment perspective, there is the “deal fatigue” mentioned by Zrikem; where AI provides the same solutions repeatedly. The issue here is the data input; AI cannot imagine or create new information, it can only draw conclusions. On a deeper level, this boils down to a lack of understanding of cultural context and market specificity, which lies more in human intelligence.

As a serial entrepreneur, this “market psychology” is something that Elkhareiji understands and is crucial to her decision-making, which is why she closely monitors buying patterns, customer expectations, and spending habits. As she explains; “I believe in organic growth and seeing what the market wants.” This cultural context is particularly important in the region, and she cites Riyadh as an example, “where people are always looking for the next big thing.”

Lossaso described this knowledge as “gut instinct”, something that other interviewees touched upon and we have described as **‘Emotional Intelligence’, which “comes more from the locals and the owners because they know the Kingdom.”** Technology aside, emotional intelligence remains a key factor in his investment decisions.

For Jonathan Worsley, CEO of The Bench, AI “represents a powerful tool”, but he also is keen to flag the risks surrounding this technology; **“with more data being stored in the cloud, we must be mindful of the potential security implications.”** Or as Othmane puts it:

“THE MORE DATA COLLECTED, THE GREATER THE RISK TO PRIVACY.”



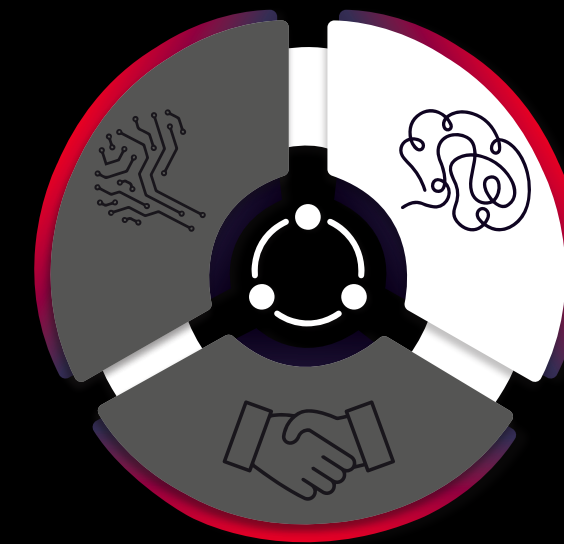
A priority for any business leader mitigating data breaches is ensuring robust security measures, and solutions do exist. Hyperfusion provides the computing infrastructure necessary for businesses to run AI instances locally, ensuring their sensitive data remains secure and private. Unlike cloud-based solutions or programs like ChatGPT, which can overlook data privacy and offer the same data to all users, their approach “supports businesses in maintaining control over their data while leveraging powerful AI capabilities.”

Data is the driving force behind AI success but can also be a double-edged sword when it comes to investment decisions, as the machine needs a huge volume to come to an accurate decision. As Lossasso explains, **“you need to sit down for a very, very long time and give them a lot of data. I haven't seen an AI tool that can generate that.”**

From a marketing perspective, authenticity is increasingly important to consumers navigating a world overwhelmed by content. Consumers can be wary of new technologies being misused, from AI-generated images to data scams. This is particularly evident when it comes to managing expectations of new locations. As Kumar says; **“using AI to create impressions of the new ‘must visit’ destination to tantalise them and then fall flat when it does not match the impression you have enhanced or generated through AI.”**

Finally, **Kurt Weinsheimer, Chief Product Officer, at travel marketing platform Sojern** sees the way to future-proof these technologies as lying in the hands of its users:

“WE LIVE IN A WORLD WHERE IT IS KEY TO UNDERSTAND THE VALUE AND CURRENT LIMITS OF AI. WE MUST EMPHASISE THE IMPORTANCE OF BUILDING TRUST THROUGH ROBUST PRIVACY, STRONG SECURITY MEASURES, USING PERMISSIONED CONSUMER OPT-IN DATA, AND ADDRESSING COPYRIGHT CONCERNS. AS VOLTAIRE (AND SPIDERMAN’S UNCLE BEN) SAID, ‘WITH GREAT POWER COMES GREAT RESPONSIBILITY’.”



RELATIONSHIP INTELLIGENCE

An interplay between machine learning and human intervention - or artificial intelligence and emotional intelligence - is a clear method for successfully harnessing emerging tech for hospitality investment. But these interviews also revealed a third element at play, specific to the growing tourism economy in the Middle East.

We have coined this term 'Relationship Intelligence', and it refers to the knowledge or understanding of potential and future plans for a region. This may include prior knowledge of a giga project, a government vision for the development of a new urban destination or regeneration of a declining area; the knowledge of the city wide or district wide strategy is the primary driver. As one interviewee anonymously told us: **“the vision comes first and then you are solving that vision to make it viable. You need to deliver the numbers against that strategy.”**

Lossaso of FAS hotels describes investment success as reliant on contacts and a knowledge of the investment landscape from a governmental perspective: **“No one can predict what's going to happen in the next five years, so it goes back to what the government is pushing within those destinations.”** As Kumar of Minor Hotels points out, some of the “larger players” even “get approached directly” by giga projects.

We have seen throughout these interviews that increasingly AI, and thus data, has a huge role to play in investment success, but as Lossaso indicates, ultimately for big construction projects “the banks manage the process”, which often require a feasibility study from an independent property consultant, which “takes the same data.” This returns us to the importance of localised or individual data, for retaining a competitive edge.

From an investment perspective, a vision is essential to the success of a project. One consultant on a giga project described the decision-making process as a “honeycomb”, as when developing any asset

“THE INTERDEPENDENCIES ARE SO COMPLICATED, IT'S ALMOST LIKE A HONEYCOMB, IT'S NOT LINEAR.”

AI has a role to play in that decision-making process, with strategy, trends, and research, but “you still need to have a vision for why you are creating a honeycomb in the first place.” This is the point where emotional and relationship Intelligence are essential.





A PEOPLE BUSINESS, POWERED BY MACHINES

In the Middle East region, tourism is a booming economy and the hospitality industry has a huge potential for growth. This white paper shows that growth will be powered by AI systems, but that ultimately human judgement and a strong network of contacts provides the competitive edge for investment success.

This is down to a number of factors, but particularly because the GCC is still a developing market, meaning plentiful guest data is harder to source. AI systems that are trained on data need huge amounts of guest input, which is harder to come by in the region, unlike in a more developed market. As one consultant told us;

“AI IS REALLY GOOD WHEN YOU HAVE LOTS OF DATA, BUT HUMANS ARE REALLY GOOD WHEN NEW THINKING IS REQUIRED.”



A PEOPLE BUSINESS, POWERED BY MACHINES

The three types of intelligence that have been uncovered through this white paper can be viewed as a matrix of success for the hospitality industry:

RELATIONSHIP INTELLIGENCE

leads in terms of success in investment, particularly in a developing market

HUMAN INTELLIGENCE

leads for guest engagement

ARTIFICIAL INTELLIGENCE

leads for optimising hospitality operations

Whether through awareness of governmental strategies, contextual knowledge or simply a human smile, this white paper revealed that in hospitality, technology must be balanced with human insight, especially in a rapidly evolving market. As one interviewee summed up;

**“HOSPITALITY IS A PEOPLE BUSINESS
AND IT ALWAYS WILL BE.”**

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