

ABU DHABI

HOTEL PERFORMANCE REPORT OCTOBER 2020



دائرة الثقافة والسياحة
DEPARTMENT OF CULTURE
AND TOURISM



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NOTE TO READERS

THIS REPORT DOES NOT INCLUDE SEP & OCT REVENUES FROM YAS ISLAND HOTELS DUE TO NON-AVAILABILITY OF COMPLETE DATA AT THE TIME OF REPORTING. PERFORMANCE ACROSS KEY REVENUE METRICS AT THE EMIRATE & REGIONAL LEVEL HAVE BEEN RE-ESTIMATED ACCORDINGLY (i.e. BY DISCOUNTING YAS ISLAND PERFORMANCE FOR SEP AND OCT 2020 & 2019) AS A RESULT, THE CONTENT AND DATA INCLUDED IN THIS REPORT ARE SUBJECT TO ALTERATION WITH EMERGENCE OF MORE ACCURATE DATA OR ACQUISITION OF FULL REQUIRED DATA

OVERALL PERFORMANCE

OCTOBER 2020

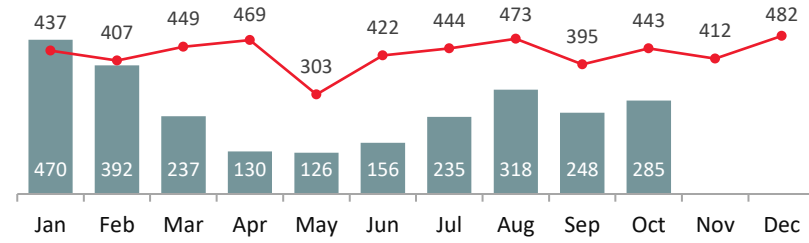


HOTEL GUESTS (000)

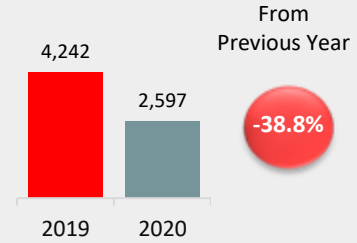
■ 2019 ■ 2020

% Change
(Oct 2020)

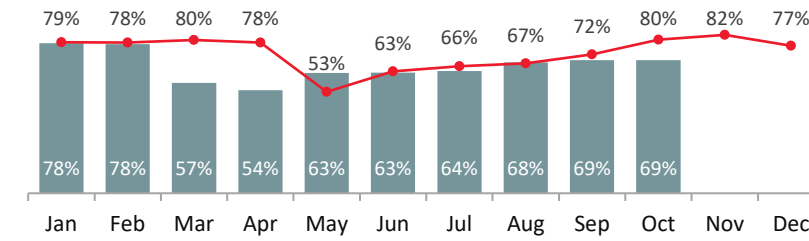
YTD (JAN- OCT)



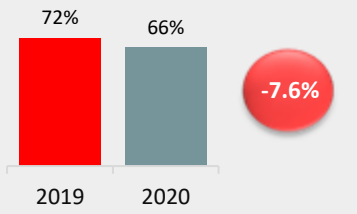
-35.8%



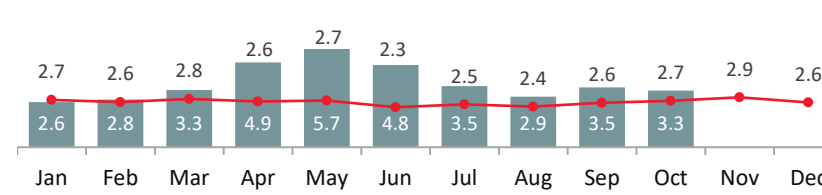
OCCUPANCY RATE



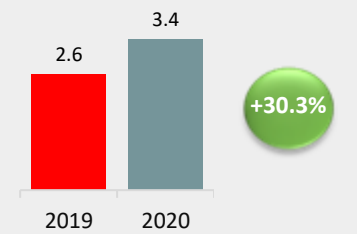
-13.4%



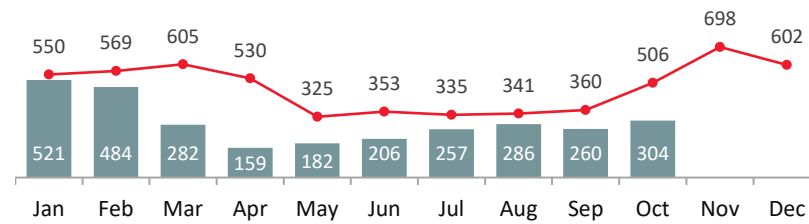
AVERAGE LENGTH OF STAY (ALOS-NIGHTS)



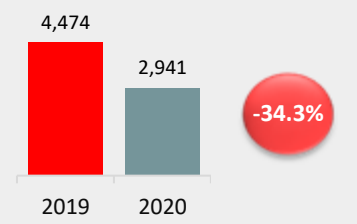
+22.6%



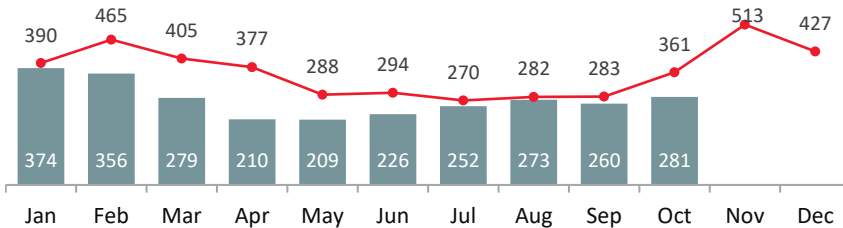
HOTEL TOTAL REVENUE (MILLION AED)



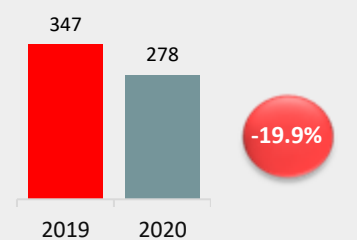
-39.9%



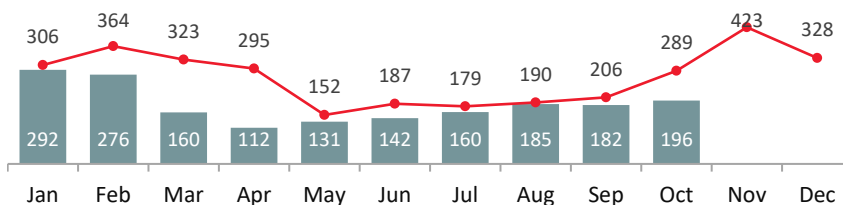
AVERAGE ROOM RATE (AED)



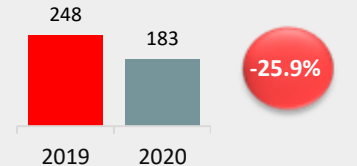
-22.1%



REVENUE PER AVAILABLE ROOM (AED)



-32.2%



HOTEL GUESTS BY NATIONALITY

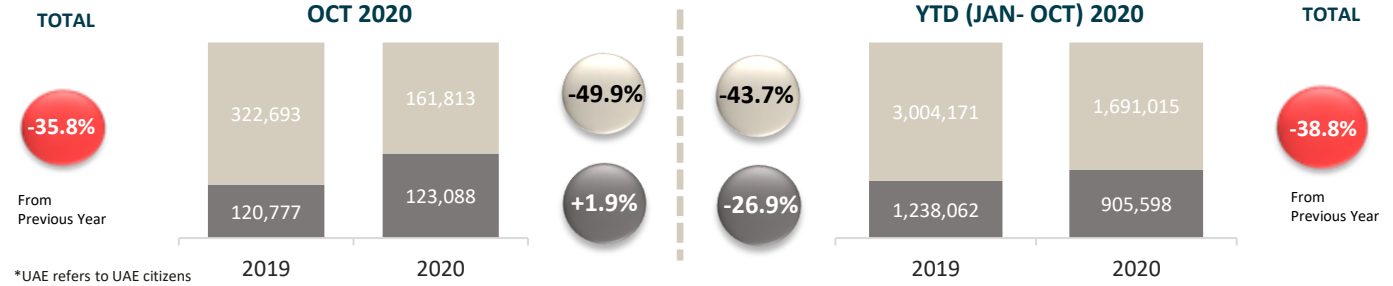
OCTOBER 2020



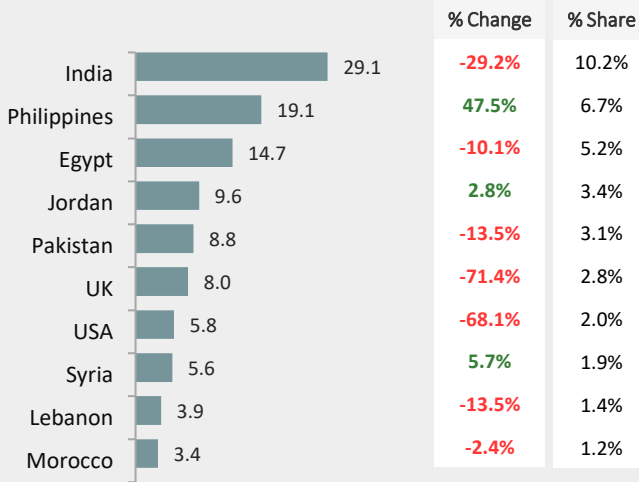
UAE VS. NON-UAE HOTEL GUESTS

284,901

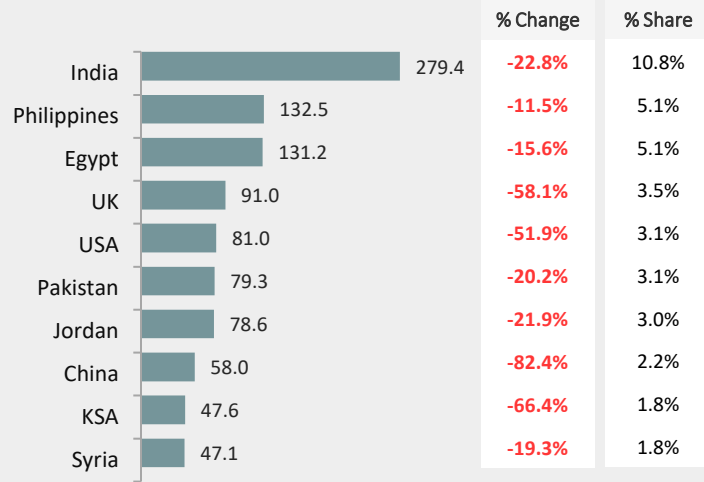
2,596,613



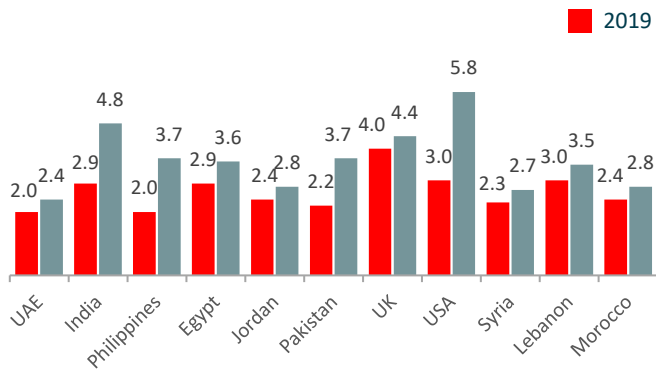
TOP 10 NON-UAE NATIONALITIES (000s) – OCT 2020



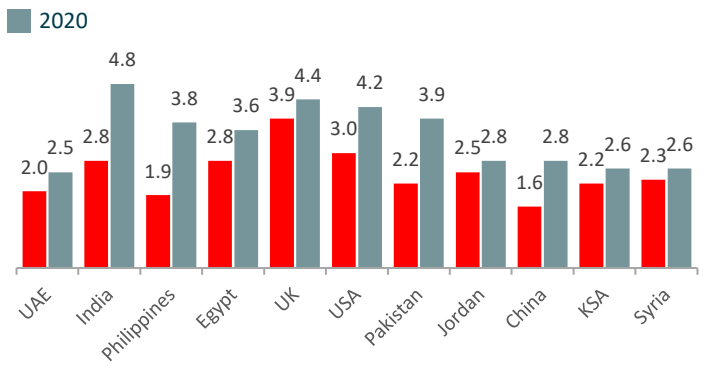
TOP 10 NON-UAE NATIONALITIES (000s) YTD OCT 2020



ALOS (NIGHTS) – OCT 2020



ALOS (NIGHTS) – YTD OCT 2020



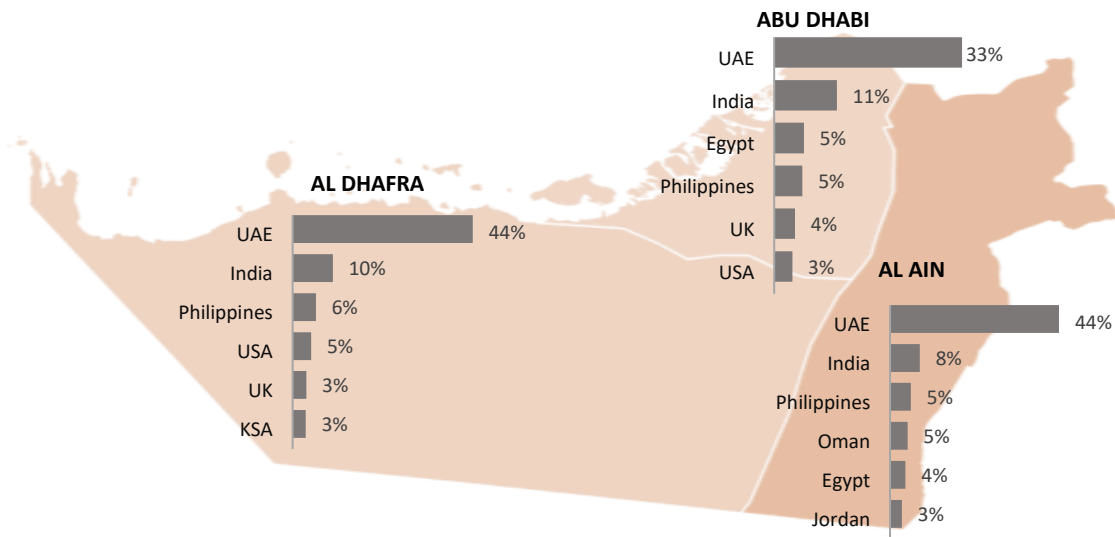
PERFORMANCE BY REGION

OCTOBER 2020

REGIONAL PERFORMANCE – OCT 2020

KEY INDICATORS	ABU DHABI			AL AIN			AL DHAFRA		
	Actual	% Change		Actual	% Change		Actual	% Change	
GUESTS	239,676	-38.6%	▼	32,623	-21.8%	▼	12,602	9.7%	▲
OCCUPANCY RATE	69%	-16.0%	▼	71%	14.9%	▲	67%	26.7%	▲
ALOS DAYS	3.4	22.5%	▲	2.5	43.4%	▲	2.7	24.4%	▲
REVENUES (M AED)	257.4	-44.5%	▼	21.8	-6.1%	▼	25.0	31.0%	▲
ARR (AED)	272	-25.3%	▼	269	12.3%	▲	513	-14.6%	▼
REVPAR (AED)	189	-37.1%	▼	191	29.1%	▲	343	8.3%	▲

TOP NATIONALITIES ACROSS REGIONS – YTD OCT 2020



REGIONAL PERFORMANCE – YTD OCT 2020

KEY INDICATORS	ABU DHABI			AL AIN			AL DHAFRA		
	Actual	% Change		Actual	% Change		Actual	% Change	
GUESTS	2,237,930	-39.9%	▼	267,858	-34.2%	▼	90,825	-17.6%	▼
OCCUPANCY RATE	67%	-9.4%	▼	63%	4.6%	▲	62%	37.3%	▲
ALOS DAYS	3.5	31.2%	▲	2.4	30.2%	▲	2.6	20.8%	▲
REVENUES (M AED)	2,573.7	-36.7%	▼	166.7	-28.4%	▼	200.7	12.9%	▲
ARR (AED)	273	-20.9%	▼	229	-14.7%	▼	544	-15.3%	▼
REVPAR (AED)	182	-28.3%	▼	143	-10.8%	▼	338	16.3%	▲

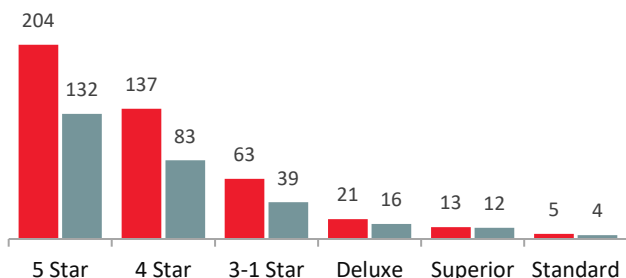
PERFORMANCE BY STAR RATING

OCTOBER 2020

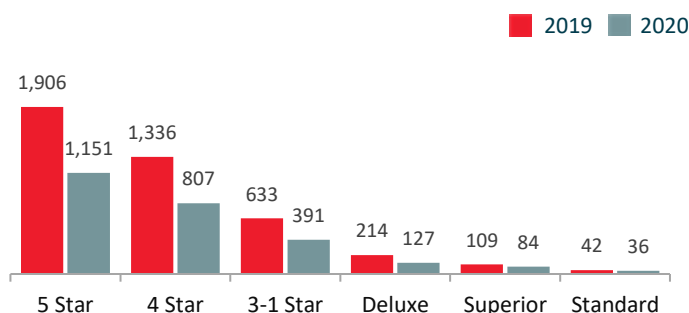


PERFORMANCE ACROSS KEY INDICATORS*

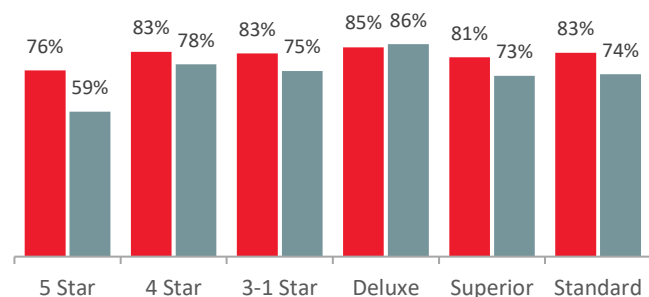
HOTEL GUESTS – OCT 2020



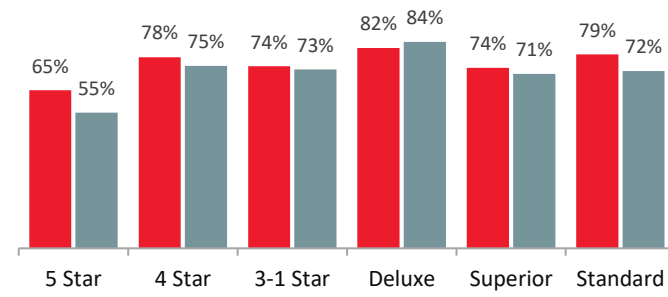
HOTEL GUESTS – YTD OCT 2020



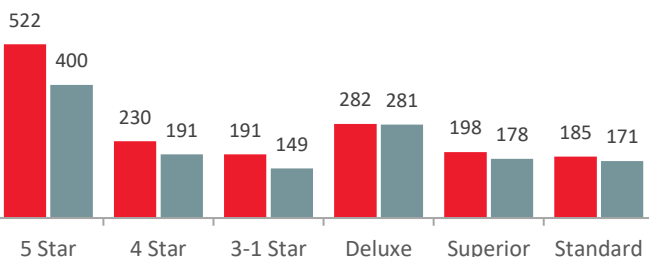
HOTEL OCCUPANCY – OCT 2020



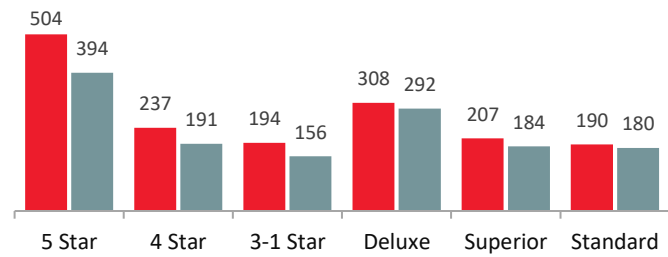
HOTEL OCCUPANCY – YTD OCT 2020



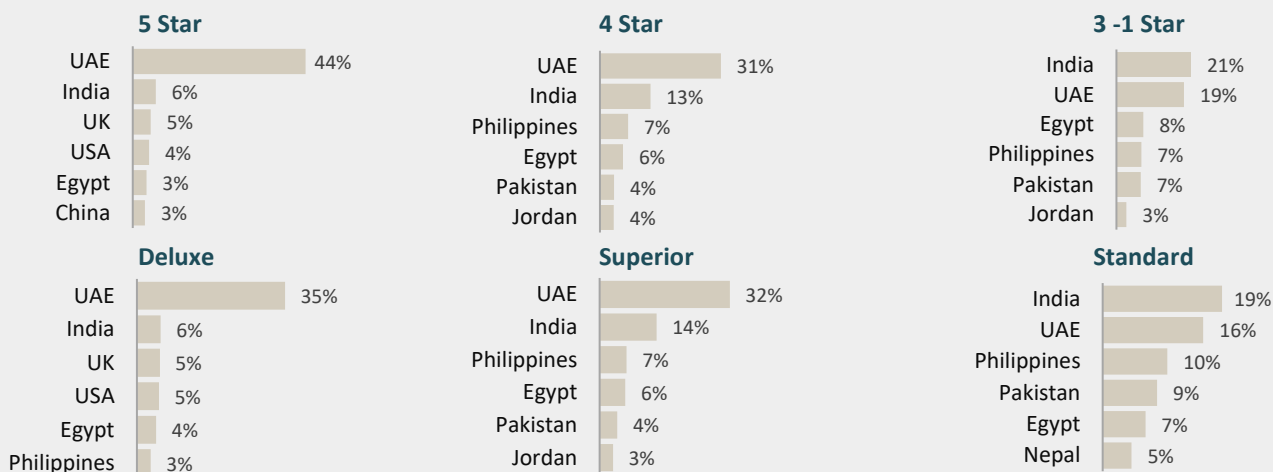
HOTEL ARR (AED) – OCT 2020



HOTEL ARR (AED) – YTD OCT 2020



TOP NATIONALITIES – YTD OCT 2020



*Note: Jumeriah at Etihad towers was rebranded to Conrad Abu Dhabi Etihad Towers on Oct 1. The establishment's October performance includes combined performance for both Etihad towers and apartments under 5-star classification. This may be subject to change under certain circumstances

YAS ISLAND PERFORMANCE

OCTOBER 2020

HOTEL SUPPLY



7

HOTELS



2,259

ROOMS



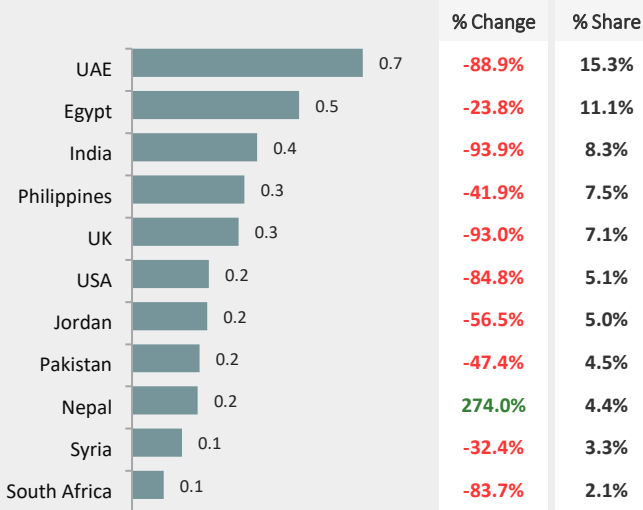
OVERALL PERFORMANCE

KEY INDICATORS	OCT 2020*		YTD OCT 2020*	
	Actual	% Change	Actual	% Change
GUESTS	4,287	-86.8% ▼	107,634	-69.5% ▼
OCCUPANCY RATE	62%	-20.8% ▼	53%	-31.7% ▼
ALOS NIGHTS	11.6	329.7% ▲	4.1	66.4% ▲
REVENUES (M AED)	---	---	110.1	-54.9% ▼
ARR (AED)	---	---	255	-24.2% ▼
REVPAR (AED)	---	---	131	-50.9% ▼

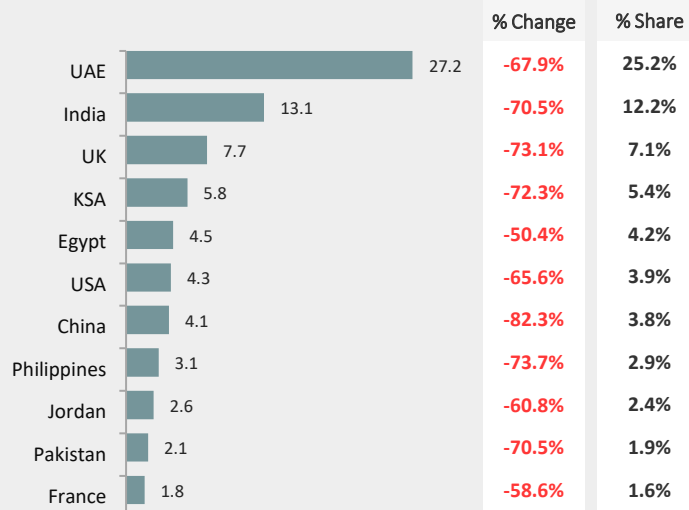
* Yas performance does not include revenues for September & October due to unavailability of complete data at the time of reporting. YTD revenue performance is reflected upto August

STAR RATING	5 STAR	4 STAR	1-3 STAR	APTS
	1 HOTEL	3 HOTELS	2 HOTELS	1 HOTEL
	499 ROOMS	1,133 ROOMS	463 ROOMS	164 ROOMS

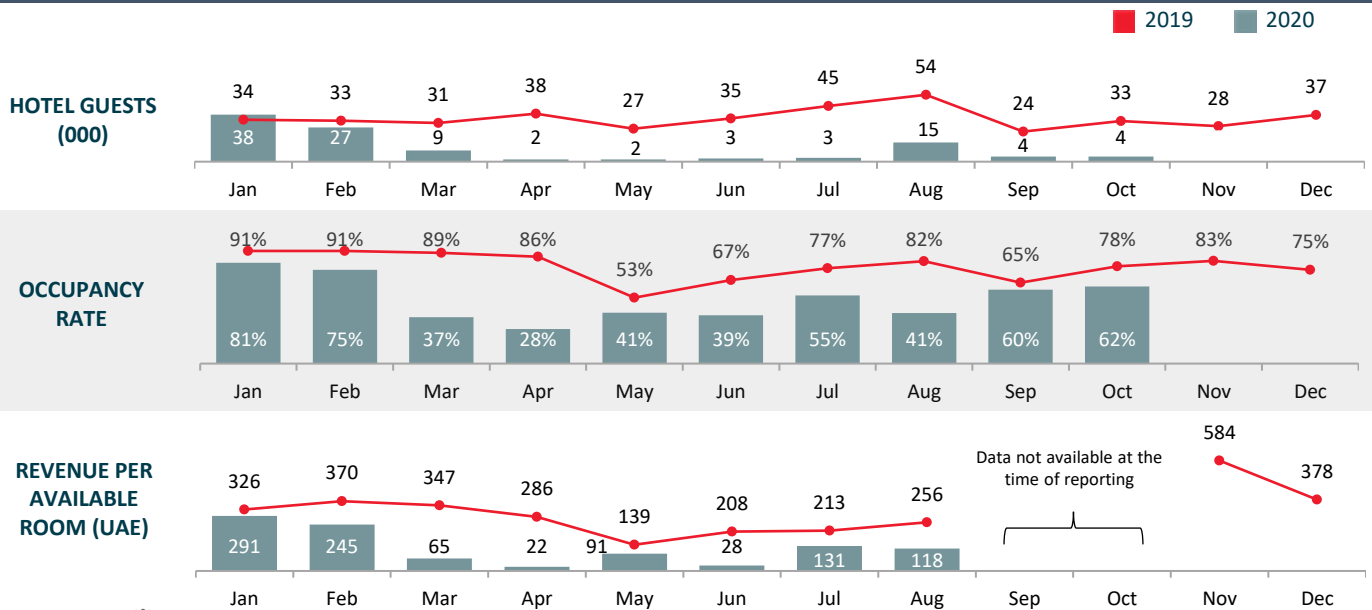
TOP NATIONALITIES (000s) – OCT 2020



TOP NATIONALITIES (000s) – YTD OCT 2020



MONTHLY TRENDS



SAADIYAT & NICHE AREAS PERFORMANCE

OCTOBER 2020

HOTEL SUPPLY



6

HOTELS



1,755

ROOMS



OVERALL PERFORMANCE

KEY INDICATORS	OCT 2020		YTD OCT 2020	
	Actual	% Change	Actual	% Change
GUESTS	18,787	37.3% ▲	124,697	-9.7% ▼
OCCUPANCY RATE	46%	-38.4% ▼	38%	-38.2% ▼
ALOS NIGHTS	2.1	-51.8% ▼	2.6	-36.3% ▼
REVENUES (M AED)	42.5	-40.3% ▼	345.6	-35.6% ▼
ARR (AED)	982	1.8% ▲	991	1.9% ▲
REVPAR (AED)	447	-37.3% ▼	380	-37.0% ▼

STAR RATING	5 STAR	4 STAR	1-3 STAR	APTS
	6 HOTELS	--- HOTELS	--- HOTELS	--- HOTELS
	1,755 ROOMS	--- ROOMS	--- ROOMS	--- ROOMS

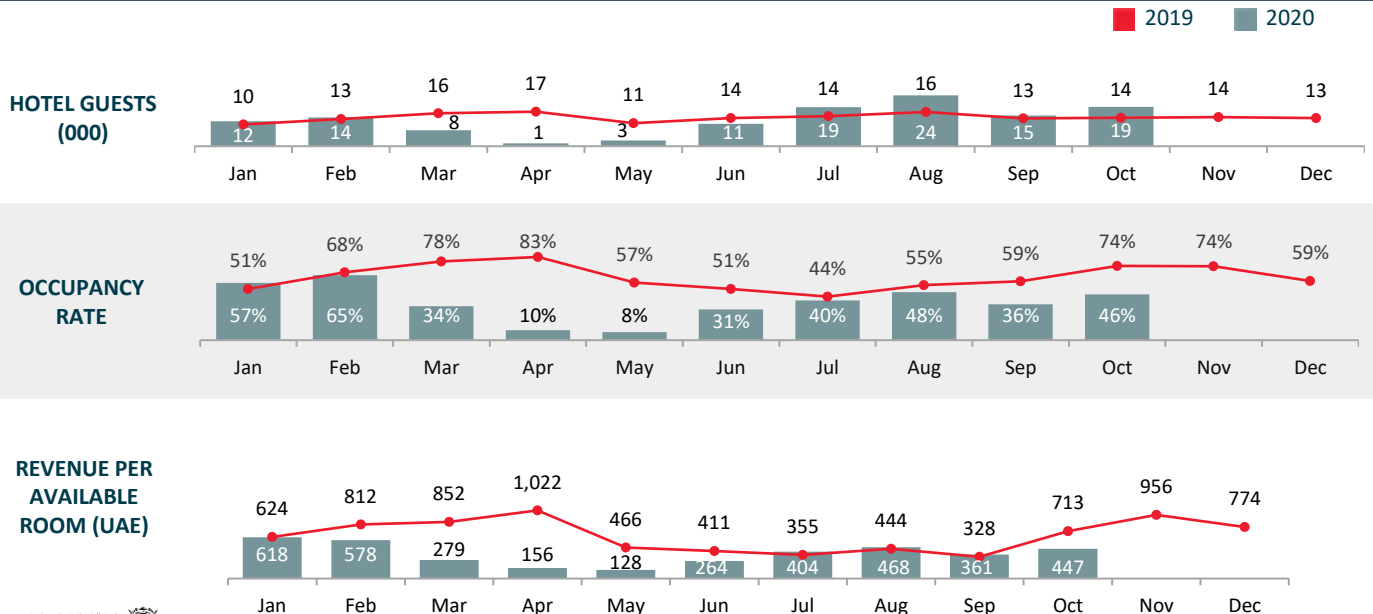
TOP NATIONALITIES (000s) – OCT 2020

Nationality	Count (000s)	% Change	% Share
UAE	11.8	309.4%	62.6%
UK	1.1	-49.2%	5.6%
Egypt	0.5	294.8%	2.4%
Lebanon	0.5	250.4%	2.4%
Jordan	0.4	422.6%	2.3%
India	0.4	115.9%	2.3%
France	0.4	-15.2%	2.1%
USA	0.4	67.1%	1.9%
Philippines	0.4	349.4%	1.9%
Canada	0.3	266.2%	1.4%
Italy	0.2	-43.8%	0.9%

TOP NATIONALITIES (000s) – YTD OCT 2020

Nationality	Count (000s)	Change %	Share %
UAE	68.2	74.1%	54.7%
UK	8.6	-48.5%	6.9%
Germany	3.9	-75.2%	3.1%
Russia	3.8	-56.6%	3.0%
USA	3.0	-8.1%	2.4%
France	2.9	-30.3%	2.3%
Egypt	2.6	77.9%	2.1%
Jordan	2.6	98.0%	2.1%
Lebanon	2.5	45.5%	2.0%
India	1.8	-39.5%	1.5%
Italy	1.6	-53.3%	1.3%

MONTHLY TRENDS



ADNEC PERFORMANCE

OCTOBER 2020

HOTEL SUPPLY



6

HOTELS



1,827

ROOMS

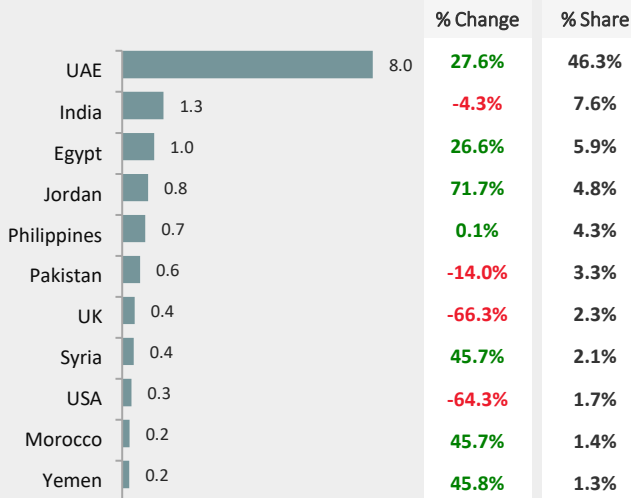


OVERALL PERFORMANCE

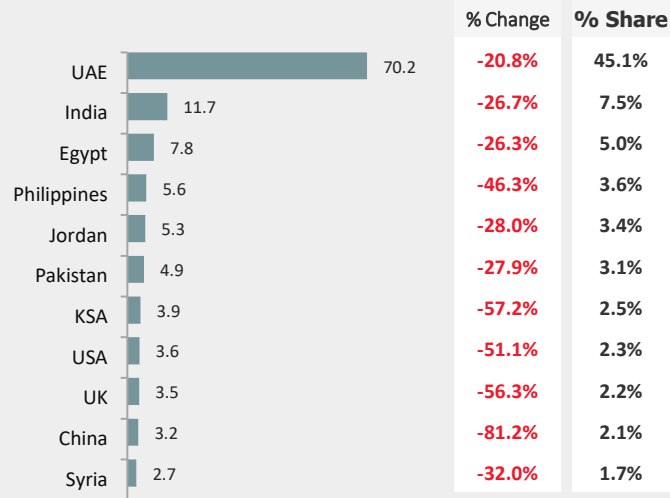
KEY INDICATORS	OCT 2020		YTD OCT 2020	
	Actual	% Change	Actual	% Change
GUESTS	17,276	-21.6%	155,745	-38.2%
OCCUPANCY RATE	84%	-6.7%	77%	-5.2%
ALOS NIGHTS	4.3	32.0%	4.2	36.0%
REVENUES (M AED)	11.0	-48.7%	120.6	-26.5%
ARR (AED)	170	-44.2%	198	-24.3%
REVPAR (AED)	144	-47.9%	154	-28.2%

STAR RATING	5 STAR	4 STAR	1-3 STAR	APTS
	1 HOTEL	2 HOTELS	2 HOTELS	1 HOTEL
	189 ROOMS	723 ROOMS	656 ROOMS	259 ROOMS

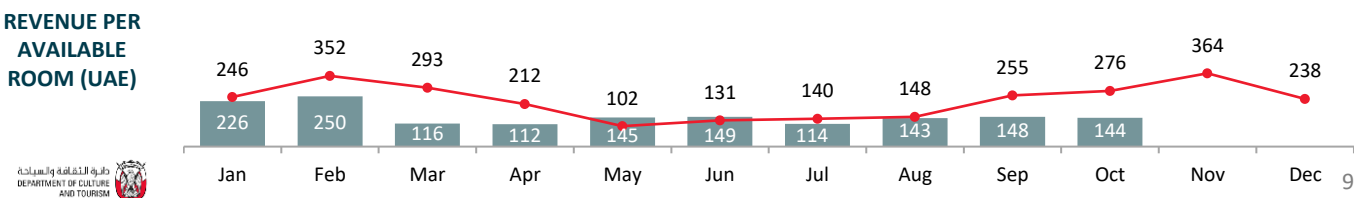
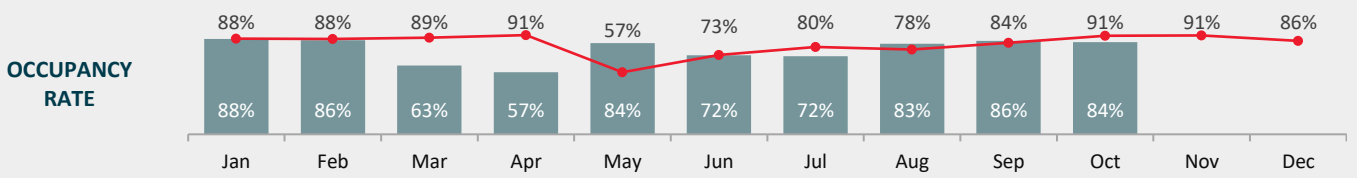
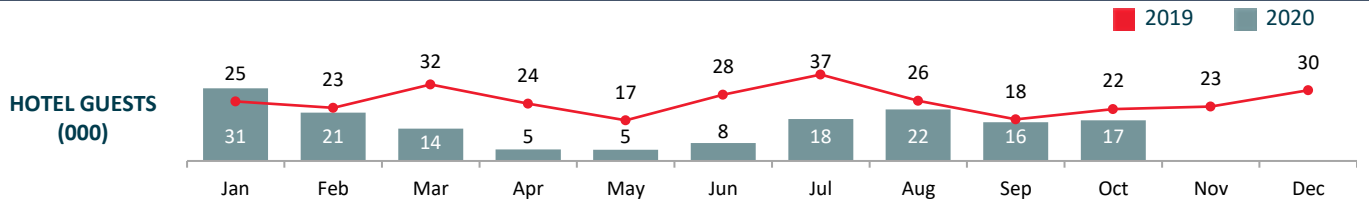
TOP NATIONALITIES (000s) – OCT 2020



TOP NATIONALITIES (000s) – YTD OCT 2020



MONTHLY TRENDS



ABU DHABI ISLAND PERFORMANCE

OCTOBER 2020

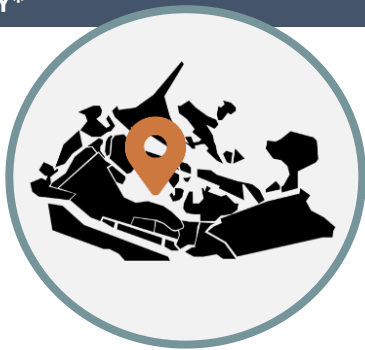
HOTEL SUPPLY*



115
HOTELS



22,995
ROOMS



STAR RATING	5 STAR	4 STAR	1-3 STAR	APTS
	36 HOTELS	23 HOTELS	20 HOTELS	36 HOTELS
	11,317 ROOMS	4,795 ROOMS	2,353 ROOMS	4,530 ROOMS

Ramee Garden (Standard Apt – 36 rooms) permanently closed on 22nd Oct 20

OVERALL PERFORMANCE

KEY INDICATORS	OCT 2020		YTD OCT 2020	
	Actual	% Change	Actual	% Change
GUESTS	199,326	-38.1% ▼	1,849,854	-38.0% ▼
OCCUPANCY RATE	70%	-15.1% ▼	69%	-6.1% ▼
ALOS NIGHTS	3.3	21.8% ▲	3.5	33.9% ▲
REVENUES (M AED)	204.0	-45.1% ▼	1,997.3	-36.0% ▼
ARR (AED)	247	-24.8% ▼	253	-19.9% ▼
REVPAR (AED)	174	-36.2% ▼	174	-24.8% ▼

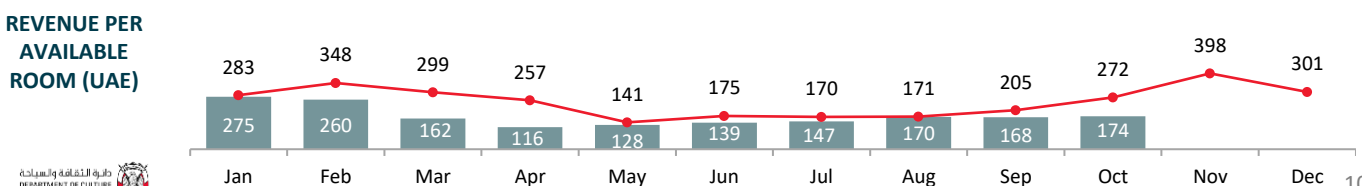
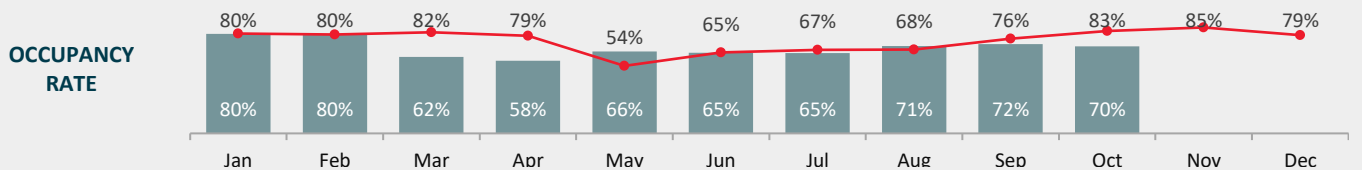
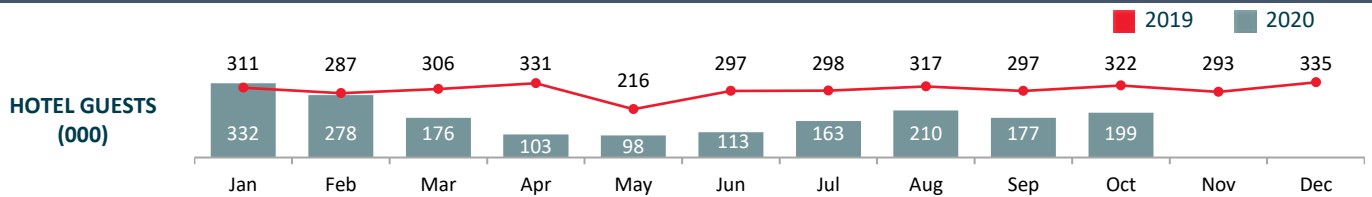
TOP NATIONALITIES (000s) – OCT 2020

Nationality	Count (000s)	% Change	% Share
UAE	83.4	3.6%	41.9%
India	22.1	-28.9%	11.1%
Philippines	14.1	35.8%	7.1%
Egypt	11.1	-15.3%	5.5%
Jordan	6.9	-2.8%	3.5%
Pakistan	6.7	-15.6%	3.4%
UK	4.9	-73.8%	2.4%
USA	4.1	-72.7%	2.0%
Syria	3.9	3.5%	1.9%
Lebanon	2.8	-15.9%	1.4%
Morocco	2.6	0.1%	1.3%

TOP NATIONALITIES (000s) – YTD OCT 2020

Nationality	Count (000s)	% Change	% Share
UAE	581.7	-27.2%	31.4%
India	223.1	-16.7%	12.1%
Egypt	103.9	-12.8%	5.6%
Philippines	102.5	-10.0%	5.5%
UK	62.8	-58.6%	3.4%
Pakistan	62.6	-16.4%	3.4%
USA	61.7	-54.2%	3.3%
Jordan	58.2	-20.1%	3.1%
China	46.4	-83.1%	2.5%
Syria	34.1	-11.5%	1.8%
KSA	30.3	-64.3%	1.6%

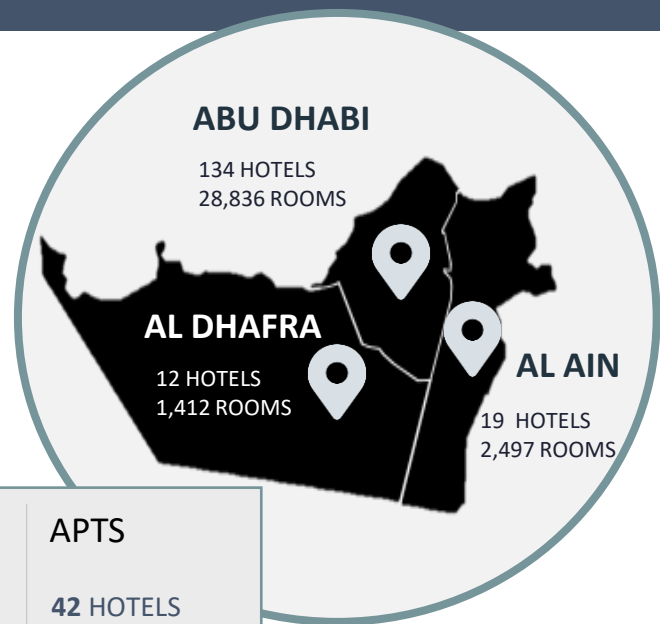
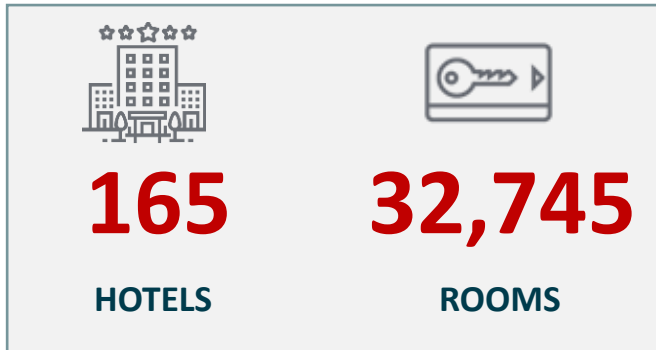
MONTHLY TRENDS



HOTEL SUPPLY

OCTOBER 2020

HOTEL SUPPLY AS OF 31st OCTOBER 2020



STAR RATING	5 STAR	4 STAR	1-3 STAR	APTS
	54 HOTELS 15,185 ROOMS	38 HOTELS 7,975 ROOMS	31 HOTELS 4,264 ROOMS	42 HOTELS 5,321 ROOMS

Quarantine Hotels: 7 properties continue to be used for quarantine purposes in October. As of Nov 8, the number of hotels used for quarantine reasons has remained unchanged

Temporary Closed Hotels: 10 hotels were temporarily closed in October, of which 6 hotels (812 rooms) remained closed for the entire month, while the remaining 4 hotels were closed during some point in October (879 rooms). Tulip Inn Al Sharia and Al Masa Plus hotel resumed their hotel operations in the past month (6th Oct & 21st Oct, respectively)

Yas Island Hotels: Since Oct 27, 3 hotels in Yas Island have resumed taking new bookings after being closed to general public for more than 50 days due to UFC 2.0 precautionary measures. Centro Yas & Staybridge suites remain temporarily closed for the entire month, while Park Inn and W Yas have suspended their room operations since the last week of October

RECENT SUPPLY ADDITIONS AND CLOSURES - 2020

Closures



CLOSED: JAN 2020

BIN MAJID HOTEL APT
LOCATION: ABU DHABI ISLAND
TYPE: DELUXE APT
ROOMS: 224



CLOSED: JUL 2020

PARAGON HOTEL
LOCATION: ABU DHABI ISLAND
TYPE: 3 STAR
ROOMS: 209



CLOSED: SEP 2020

MURJAN ASFAR HOTEL APT
LOCATION: ABU DHABI ISLAND
TYPE: SUPERIOR APT
ROOMS: 92



CLOSED: OCT 2020

RAMEE GARDEN HOTEL APT
LOCATION: ABU DHABI ISLAND
TYPE: STANDARD APT
ROOMS: 36

Additions



OPEN: MAR/OCT 2020*

REMAL HOTEL
LOCATION: AL DHAFRA
TYPE: 4 STAR
ROOMS: 205

*Remal Hotel, located in Al Dhafra region, was issued a temporary license in March and has been recently upgraded to a 4-star property (Oct). As a result, this hotel has been now added into the supply



Available rooms for sale

Number of rooms available during the month covered by the report excluding out-of-order (a room status term indicating that a room is scheduled for maintenance, refurbishment, deep cleaning, etc.)



Occupied rooms

Number of rooms used on a daily basis including complimentary rooms.



Occupancy Rate, %

Occupancy is the percentage of available rooms that are occupied, calculated by dividing the number of occupied rooms by the available rooms.



Hotel Guests

Number of guests staying in the hotel including those who occupied complimentary or non-revenue generating rooms either for day-stay or overnight-stay.



Guests Nights

Number of night guests spent in the hotel regardless of the type of rooms they occupy.



Average Length of Stay (ALOS)

Average number of nights guests spent in a single stay, calculated by dividing guest nights by hotel guests.



Total revenues

Revenue generated by hotels from all their operations, including service charge and taxes.



Average room (daily) rate ARR/ADR

A ratio that indicates average room rate and to what extent rooms are being up-sold or discounted; calculated by dividing room revenue by the number of occupied rooms. (excludes complimentary & house use)



Revenue per available room RevPAR

Revenue per Available rooms, calculated by dividing the total revenues by total rooms in hotel minus out-of-service rooms

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