ABU DHABI

HOTEL PERFORMANCE REPORT

SEPTEMBER 2020

دائرة الثقافة والسياحة
DEPARTMENT OF CULTURE AND TOURISM

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NOTE TO READERS

THIS REPORT DOES NOT INCLUDE SEPTEMBER 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)

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

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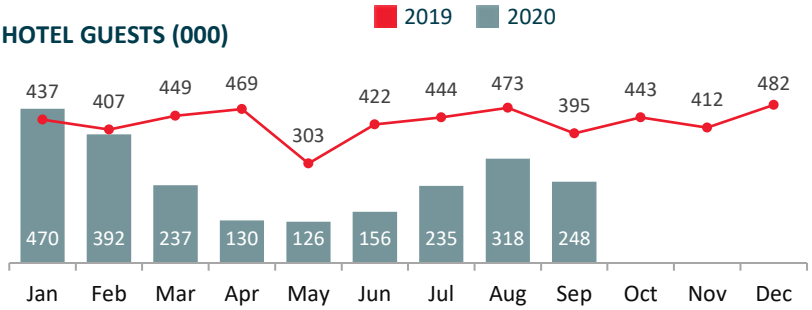
OVERALL PERFORMANCE

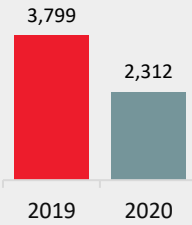
SEPTEMBER 2020

HOTEL GUESTS (000)



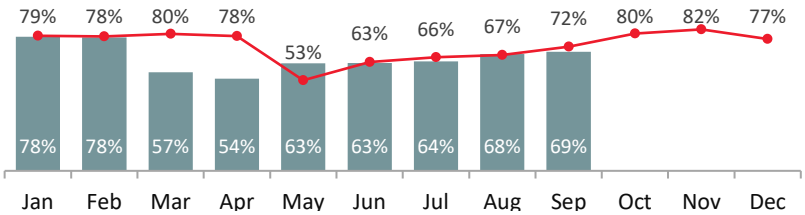
% Change (Sep 2020): -37.2%

YTD (JAN- SEP)

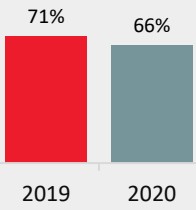


From Previous Year: -39.1%

OCCUPANCY RATE

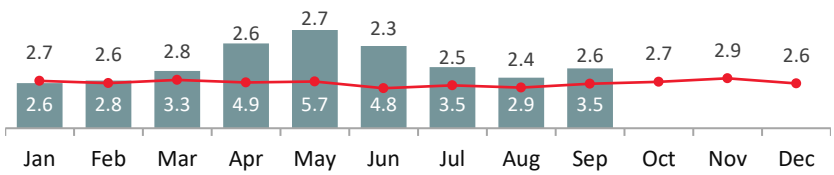


-4.2%

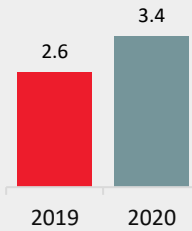


-6.8%

AVERAGE LENGTH OF STAY (ALOS-NIGHTS)

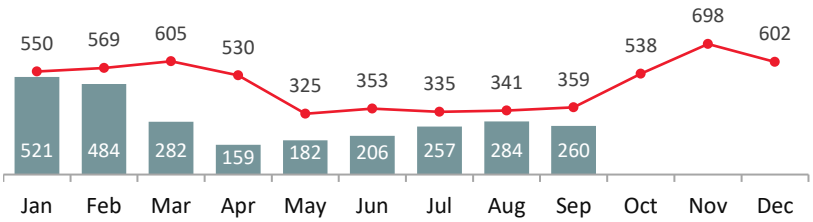


+33.9%

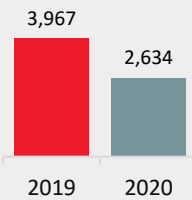


+31.3%

HOTEL TOTAL REVENUE (MILLION AED)

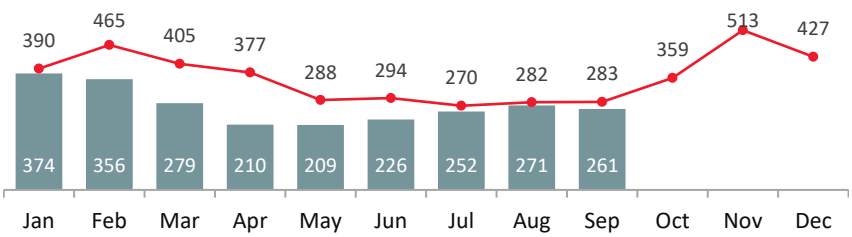


-27.7%

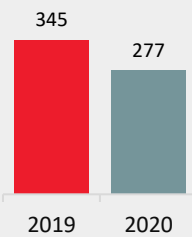


-33.6%

AVERAGE ROOM RATE (AED)

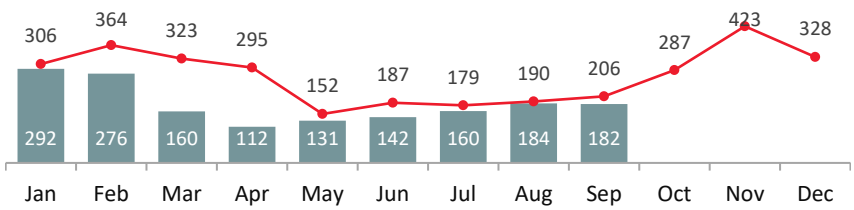


-7.9%

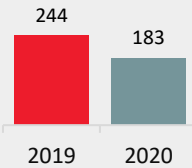


-19.7%

REVENUE PER AVAILABLE ROOM (AED)



-11.7%



-25.2%

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HOTEL GUESTS BY NATIONALITY

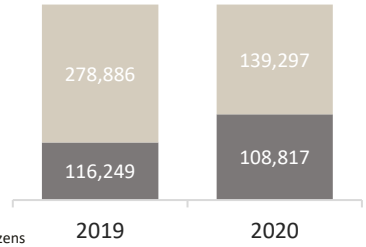
SEPTEMBER 2020

UAE VS. NON-UAE HOTEL GUESTS

248,114 TOTAL

-37.2% From Previous Year

*UAE refers to UAE citizens

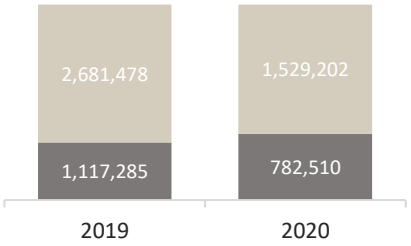


-50.1%

-6.4%

-43.0%

-30.0%



2,311,712 TOTAL

-39.1% From Previous Year

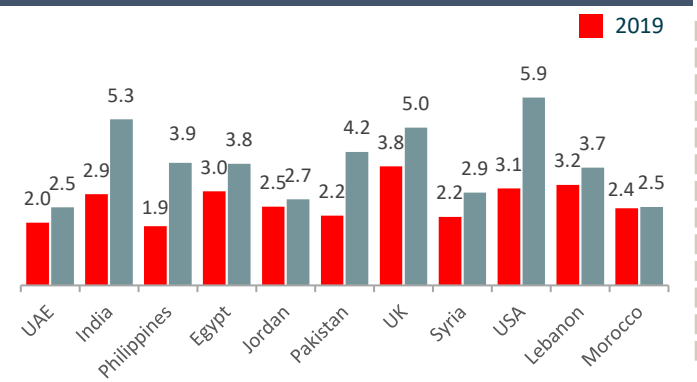
TOP 10 NON-UAE NATIONALITIES (000s) – SEP 2020

		% Change	% Share
India	25.5	-27.8%	10.3%
Philippines	16.3	7.4%	6.6%
Egypt	13.0	-11.1%	5.2%
Jordan	8.3	-15.1%	3.3%
Pakistan	8.2	-13.1%	3.3%
UK	5.3	-74.4%	2.2%
Syria	5.2	1.4%	2.1%
USA	4.9	-70.0%	2.0%
Lebanon	3.3	-20.0%	1.3%
Morocco	3.2	-2.1%	1.3%

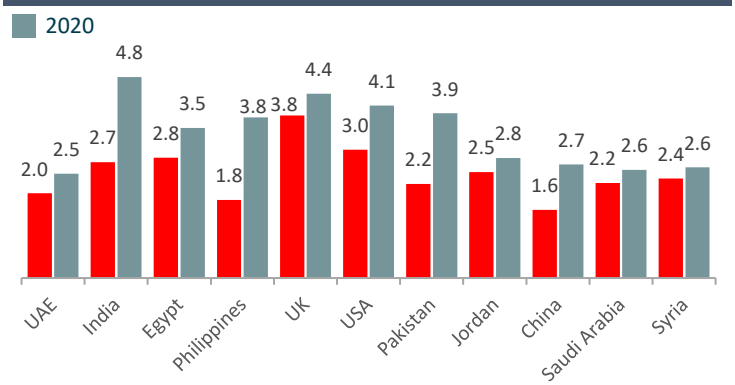
TOP 10 NON-UAE NATIONALITIES (000s) YTD SEP 2020

		% Change	% Share
India	250.3	-21.9%	10.8%
Egypt	116.5	-16.2%	5.0%
Philippines	113.4	-17.1%	4.9%
UK	83.1	-56.2%	3.6%
USA	75.2	-50.0%	3.3%
Pakistan	70.6	-21.0%	3.1%
Jordan	68.9	-24.5%	3.0%
China	56.8	-80.9%	2.5%
Saudi Arabia	46.9	-64.7%	2.0%
Syria	41.5	-21.8%	1.8%

ALOS (NIGHTS) – SEP 2020



ALOS (NIGHTS) – YTD SEP 2020



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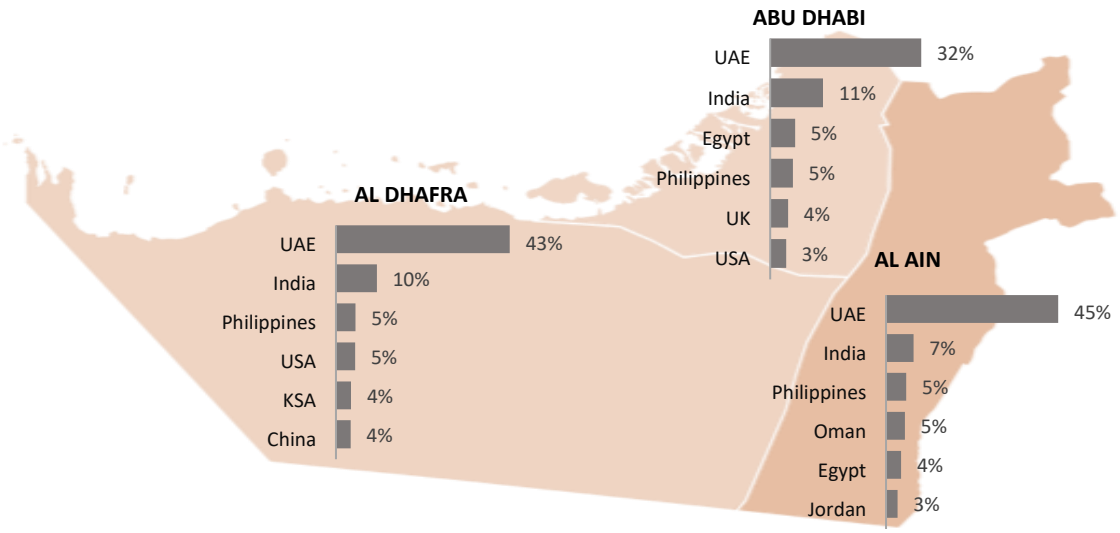
PERFORMANCE BY REGION

SEPTEMBER 2020

REGIONAL PERFORMANCE – SEP 2020

KEY INDICATORS	ABU DHABI		AL AIN		AL DHAFRA	
	Actual	% Change	Actual	% Change	Actual	% Change
GUESTS	212,300	-39.8% ▼	26,467	-23.4% ▼	9,347	17.3% ▲
OCCUPANCY RATE	70%	-7.0% ▼	70%	32.7% ▲	53%	32.1% ▲
ALOS DAYS	3.6	34.3% ▲	2.8	61.1% ▲	2.3	10.0% ▲
REVENUES (M AED)	224.4	-32.2% ▼	17.7	-1.0% ▼	17.6	72.4% ▲
ARR (AED)	255	-10.7% ▼	246	13.6% ▲	501	28.5% ▲
REVPAR (AED)	179	-17.0% ▼	175	51.5% ▲	265	69.7% ▲

TOP NATIONALITIES ACROSS REGIONS – YTD SEP 2020



REGIONAL PERFORMANCE – YTD SEP 2020

KEY INDICATORS	ABU DHABI		AL AIN		AL DHAFRA	
	Actual	% Change	Actual	% Change	Actual	% Change
GUESTS	1,998,254	-40.1% ▼	235,235	-35.6% ▼	78,223	-20.7% ▼
OCCUPANCY RATE	66%	-8.6% ▼	62%	3.4% ▲	61%	38.1% ▲
ALOS DAYS	3.5	32.3% ▲	2.4	28.6% ▲	2.6	20.1% ▲
REVENUES (M AED)	2,316.2	-35.7% ▼	143.7	-31.2% ▼	174.1	9.7% ▲
ARR (AED)	273	-20.4% ▼	222	-18.1% ▼	543	-16.2% ▼
REVPAR (AED)	182	-27.2% ▼	138	-15.4% ▼	333	15.7% ▲

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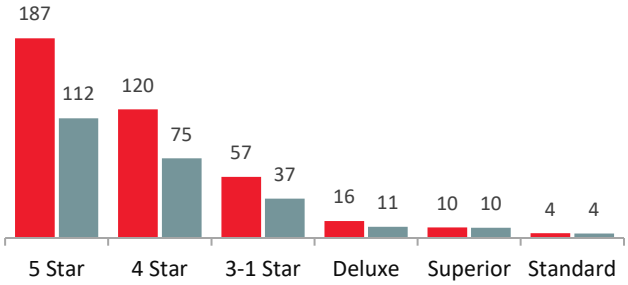
PERFORMANCE BY STAR RATING

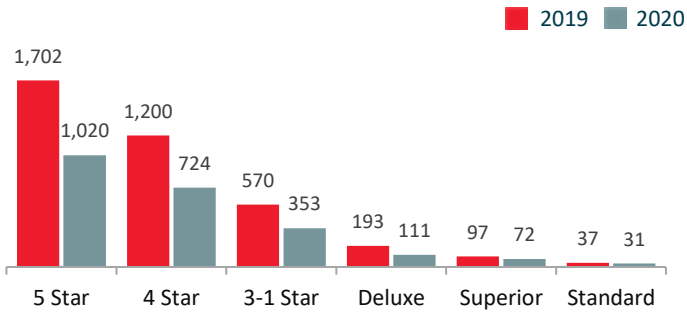
SEPTEMBER 2020

PERFORMANCE ACROSS KEY INDICATORS

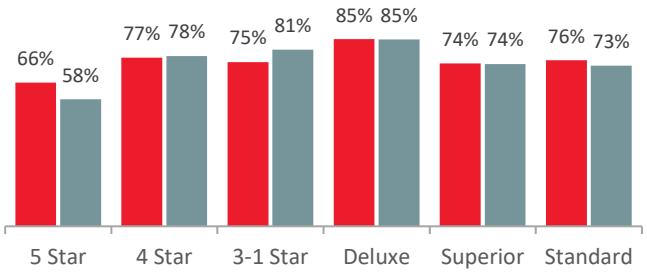
HOTEL GUESTS – SEP 2020



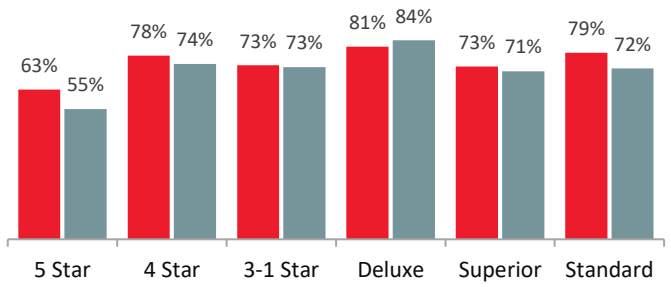
HOTEL GUESTS – YTD SEP 2020



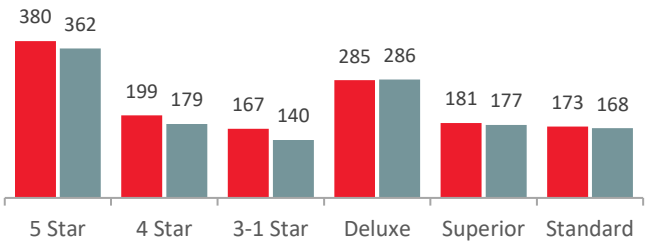
HOTEL OCCUPANCY– SEP 2020



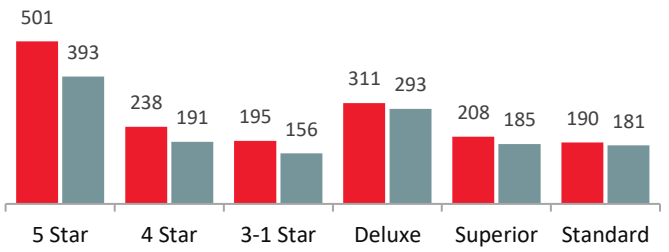
HOTEL OCCUPANCY – YTD SEP 2020



HOTEL ARR (AED)– SEP 2020

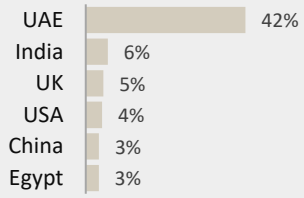


HOTEL ARR (AED) –YTD SEP 2020

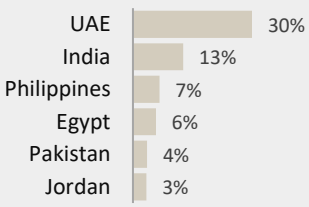


TOP NATIONALITIES – YTD SEP 2020

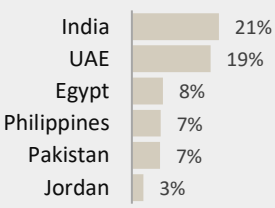
5 Star



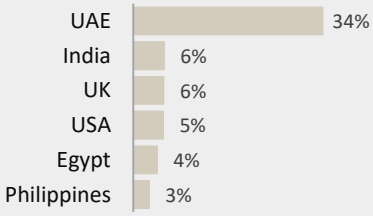
4 Star



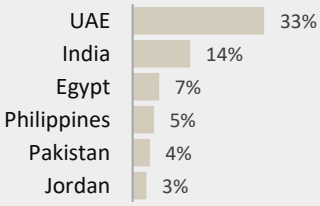
3 -1 Star



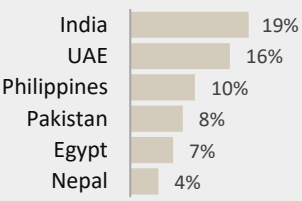
Deluxe



Superior



Standard



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YAS ISLAND PERFORMANCE

SEPTEMBER 2020

HOTEL SUPPLY

7 HOTELS

2,259 ROOMS

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

OVERALL PERFORMANCE

KEY INDICATORS	SEP 2020 Actual	SEP 2020 % Change	YTD SEP 2020 Actual	YTD SEP 2020 % Change
GUESTS	4,107	-83.1%	103,347	-67.7%
OCCUPANCY RATE	60%	-8.5%	52%	-32.8%
ALOS NIGHTS	10.9	337.8%	3.8	55.3%
REVENUES (M AED)*	---	---	110.1	-54.9%
ARR (AED)*	---	---	255	-24.2%
REVPAR (AED)*	---	---	131	-50.9%

* Sep performance does not include revenues from Yas hotels due to unavailability of complete data at the time of reporting. YTD revenue performance is reflected upto Aug

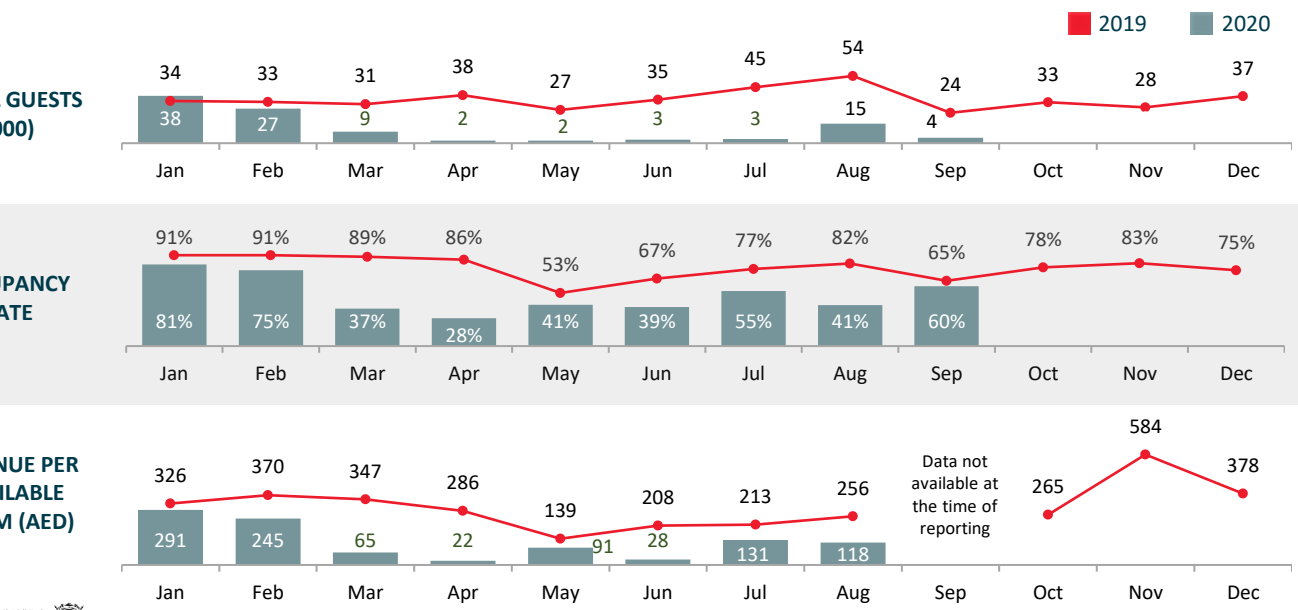
TOP NATIONALITIES (000s) – SEP 2020

		% Change	Share %
UAE	1.0	-76.1%	25.3%
India	0.3	-89.2%	8.2%
Philippines	0.3	-60.5%	7.4%
Nepal	0.3	573.2%	6.7%
Pakistan	0.3	-47.3%	6.2%
USA	0.2	-77.3%	5.9%
UK	0.2	-91.2%	3.8%
Egypt	0.2	-76.6%	3.7%
Sri Lanka	0.1	150.0%	3.5%
Bangladesh	0.1	1150%	2.4%
Syria	0.1	-62.2%	2.4%

TOP NATIONALITIES (000s) – YTD SEP 2020

		% Change	% Share
UAE	26.5	-66.3%	25.7%
India	12.7	-67.0%	12.3%
UK	7.4	-69.5%	7.1%
Saudi Arabia	5.8	-71.1%	5.6%
China	4.1	-81.4%	3.9%
USA	4.0	-63.1%	3.9%
Egypt	4.0	-52.4%	3.9%
Philippines	2.8	-75.2%	2.7%
Jordan	2.4	-61.1%	2.3%
Pakistan	1.9	-71.7%	1.8%
France	1.7	-53.8%	1.7%

MONTHLY TRENDS



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SAADIYAT & NICHE AREAS PERFORMANCE
SEPTEMBER 2020

HOTEL SUPPLY

6 HOTELS

1,755 ROOMS

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

OVERALL PERFORMANCE

KEY INDICATORS	SEP 2020 Actual	SEP 2020 % Change	YTD SEP 2020 Actual	YTD SEP 2020 % Change
GUESTS	14,677	10.6% ▲	105,910	-14.8% ▼
OCCUPANCY RATE	36%	-39.2% ▼	37%	-38.1% ▼
ALOS NIGHTS	1.9	-54.3% ▼	2.7	-33.6% ▼
REVENUES (M AED)	31.9	-10.0% ▼	303.1	-34.9% ▼
ARR (AED)	1,014	81.4% ▲	992	1.9% ▲
REVPAR (AED)	361	10.2% ▲	372	-36.9% ▼

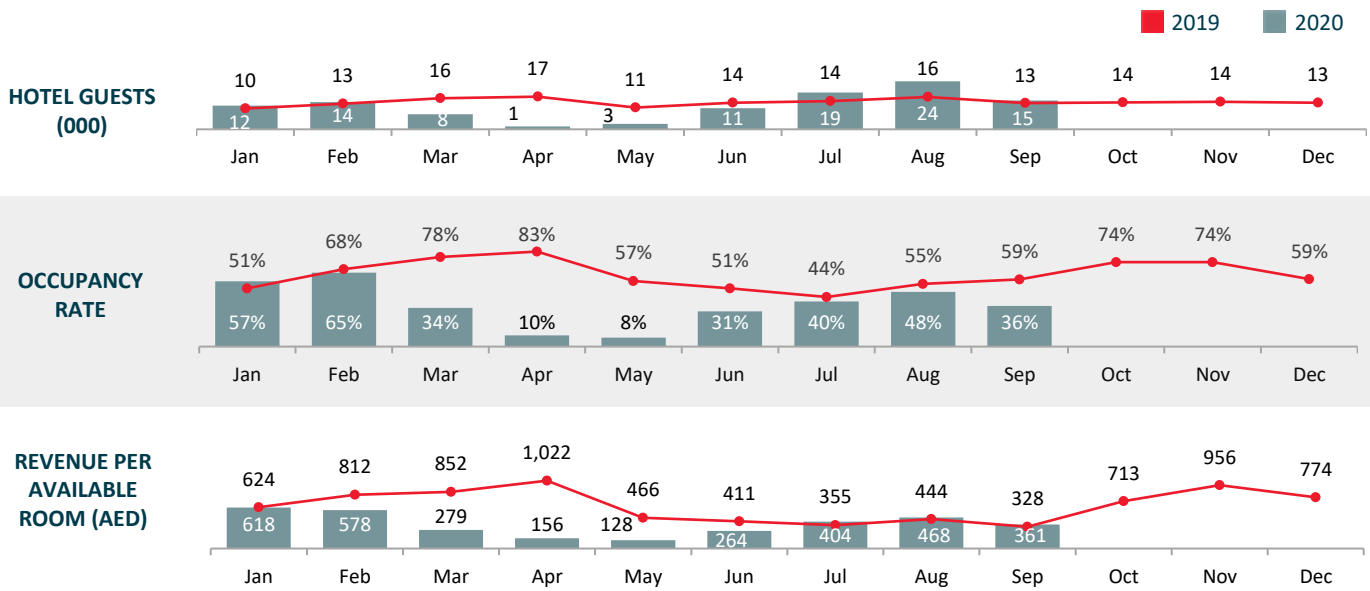
TOP NATIONALITIES (000s) – SEP 2020

		% Change	% Share
UAE	10.1	174.0%	69.1%
UK	0.7	-64.1%	4.5%
Philippines	0.4	282.3%	2.9%
Jordan	0.3	164.1%	2.1%
USA	0.3	20.0%	2.0%
Egypt	0.3	133.9%	1.9%
India	0.3	36.1%	1.8%
Lebanon	0.2	59.9%	1.6%
France	0.2	-49.5%	1.0%
Canada	0.1	83.6%	0.9%
Syria	0.1	115.4%	0.8%

TOP NATIONALITIES (000s) – YTD SEP 2020

		Change %	Share %
UAE	56.4	55.5%	53.3%
UK	7.5	-48.3%	7.1%
Germany	3.8	-72.6%	3.6%
Russia	3.7	-48.9%	3.5%
USA	2.7	-13.3%	2.5%
France	2.5	-32.2%	2.4%
Egypt	2.2	59.3%	2.0%
Jordan	2.1	75.6%	2.0%
Lebanon	2.0	28.9%	1.9%
Italy	1.4	-54.3%	1.3%
India	1.4	-50.6%	1.3%

MONTHLY TRENDS



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ADNEC PERFORMANCE
SEPTEMBER 2020

HOTEL SUPPLY

6 HOTELS

1,827 ROOMS

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

OVERALL PERFORMANCE

KEY INDICATORS	SEP 2020 Actual	SEP 2020 % Change	YTD SEP 2020 Actual	YTD SEP 2020 % Change
GUESTS	16,440	-7.4%	138,469	-39.8%
OCCUPANCY RATE	86%	2.1%	77%	-5.0%
ALOS NIGHTS	4.3	10.1%	4.2	36.3%
REVENUES (M AED)	11.0	-42.6%	109.6	-23.2%
ARR (AED)	173	-43.0%	202	-21.3%
REVPAR (AED)	148	-41.8%	155	-25.2%

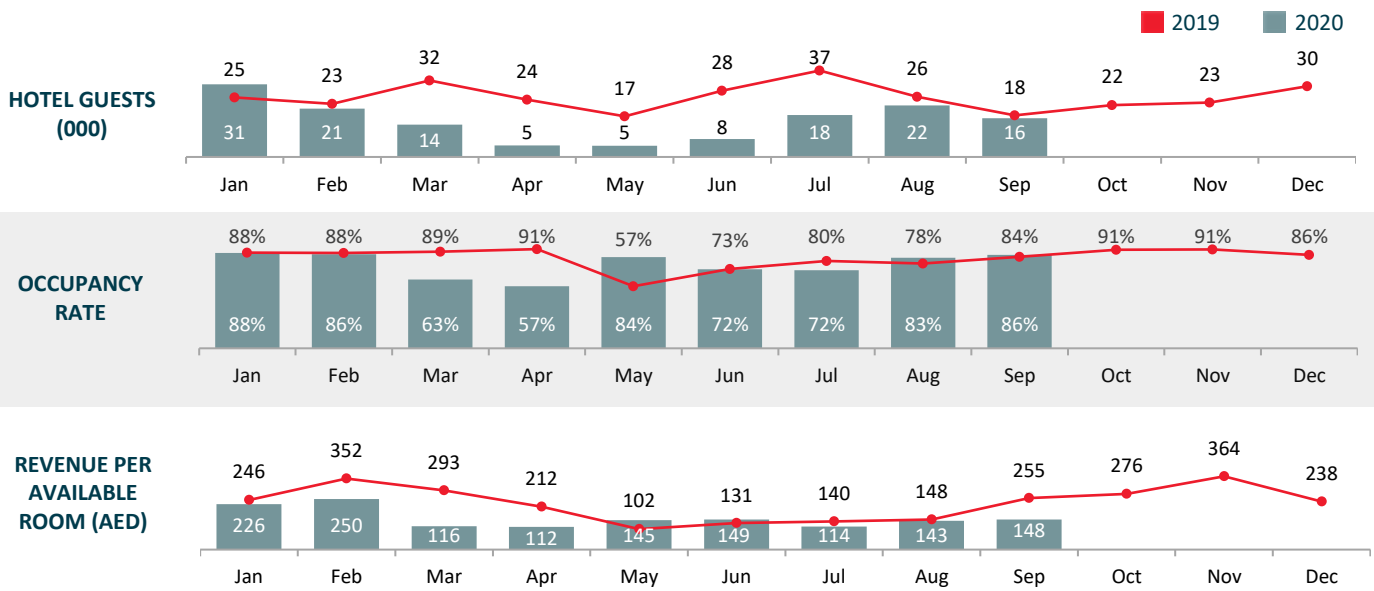
TOP NATIONALITIES (000s) – SEP 2020

		% Change	% Share
UAE	8.6	50.3%	52.4%
India	1.3	1.5%	7.7%
Egypt	0.8	4.6%	4.9%
Jordan	0.7	28.9%	4.0%
Philippines	0.6	18.8%	3.6%
Pakistan	0.5	2.8%	3.1%
Syria	0.4	58.4%	2.1%
UK	0.3	-47.5%	2.1%
USA	0.2	-63.2%	1.5%
Morocco	0.2	37.0%	1.1%
Lebanon	0.2	-22.7%	1.1%

TOP NATIONALITIES (000s) – YTD SEP 2020

		% Change	% Share
UAE	62.2	-24.5%	44.9%
India	10.4	-28.8%	7.5%
Egypt	6.7	-30.7%	4.9%
Philippines	4.8	-49.8%	3.5%
Jordan	4.4	-35.0%	3.2%
Pakistan	4.3	-29.4%	3.1%
Saudi Arabia	3.8	-56.2%	2.8%
USA	3.3	-49.4%	2.4%
China	3.2	-79.3%	2.3%
UK	3.1	-54.6%	2.2%
Syria	2.3	-37.4%	1.7%

MONTHLY TRENDS



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ABU DHABI ISLAND PERFORMANCE

SEPTEMBER 2020

HOTEL SUPPLY

117 HOTELS

23,123 ROOMS

STAR RATING	5 STAR	4 STAR	1-3 STAR	APTS
	36 HOTELS	23 HOTELS	20 HOTELS	38 HOTELS
	11,317 ROOMS	4,795 ROOMS	2,353 ROOMS	4,658 ROOMS

OVERALL PERFORMANCE

KEY INDICATORS	SEP 2020 Actual	SEP 2020 % Change	YTD SEP 2020 Actual	YTD SEP 2020 % Change
GUESTS	177,076	-40.4%	1,650,528	-38.0%
OCCUPANCY RATE	72%	-6.0%	69%	-4.9%
ALOS NIGHTS	3.5	37.0%	3.5	35.5%
REVENUES (M AED)	181.5	-34.4%	1,793.4	-34.7%
ARR (AED)	234	-12.9%	253	-19.3%
REVPAR (AED)	168	-18.1%	174	-23.3%

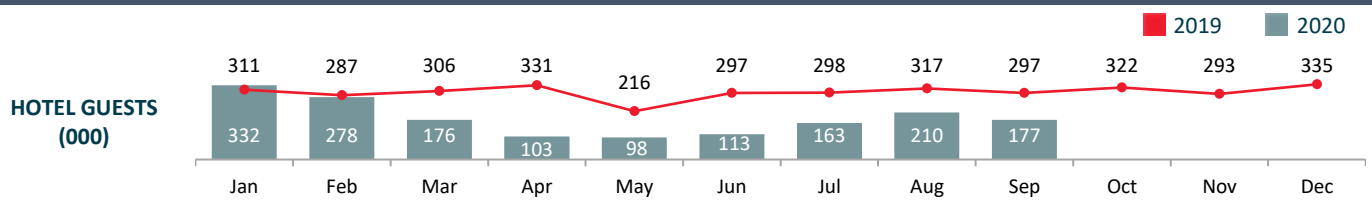
TOP NATIONALITIES (000s) – SEP 2020

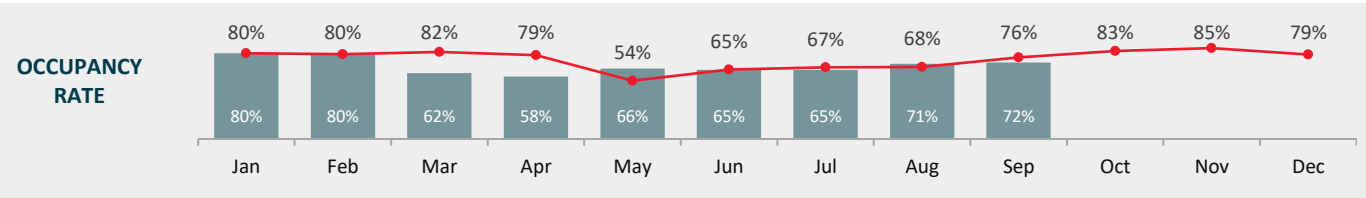
		% Change	% Share
UAE	72.1	-13.1%	40.7%
India	20.4	-29.0%	11.5%
Philippines	11.9	-3.6%	6.7%
Egypt	10.5	-8.3%	5.9%
Pakistan	6.3	-15.2%	3.6%
Jordan	6.1	-16.3%	3.5%
Syria	3.9	6.9%	2.2%
UK	3.6	-77.3%	2.0%
USA	3.5	-74.2%	2.0%
Lebanon	2.5	-18.9%	1.4%
Morocco	2.5	-1.1%	1.4%

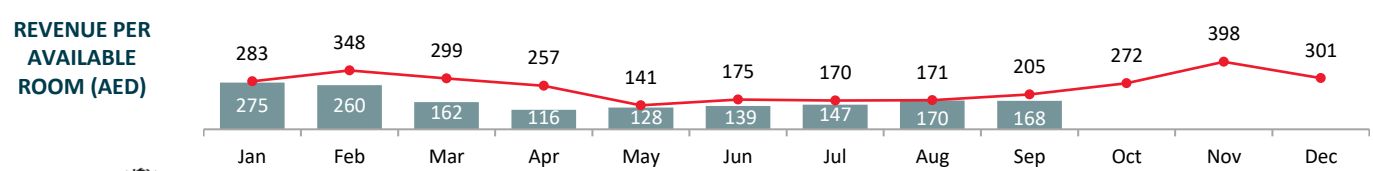
TOP NATIONALITIES (000s) – YTD SEP 2020

		% Change	% Share
UAE	498.2	-30.7%	30.2%
India	201.0	-15.1%	12.2%
Egypt	92.9	-12.5%	5.6%
Philippines	88.4	-14.6%	5.4%
UK	57.9	-56.5%	3.5%
USA	57.6	-51.9%	3.5%
Pakistan	55.8	-16.5%	3.4%
Jordan	51.2	-22.0%	3.1%
China	45.3	-81.5%	2.7%
Syria	30.2	-13.1%	1.8%
Saudi Arabia	30.0	-62.1%	1.8%

MONTHLY TRENDS







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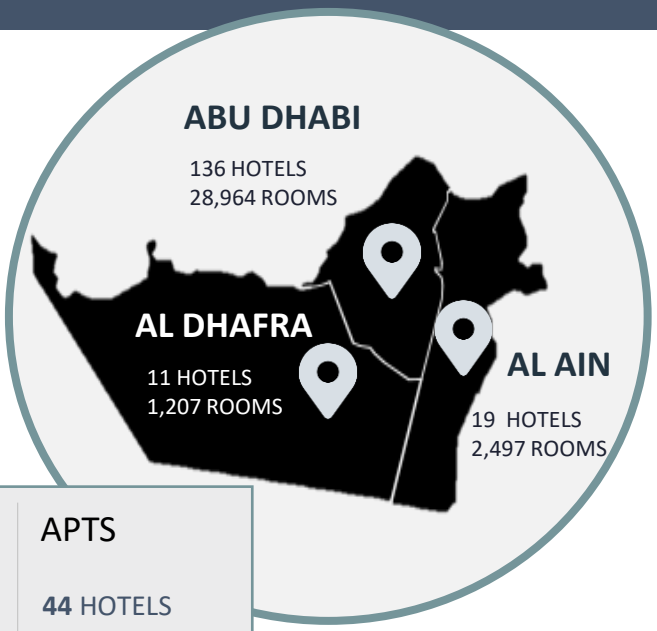
HOTEL SUPPLY
SEPTEMBER 2020

HOTEL SUPPLY AS OF SEPTEMBER 2020

166 HOTELS

32,668 ROOMS



STAR RATING

5 STAR	4 STAR	1-3 STAR	APTS
54 HOTELS **15,185** ROOMS	**37** HOTELS **7,770** ROOMS	**31** HOTELS **4,264** ROOMS	**44** HOTELS **5,449** ROOMS

Quarantine Hotels: In September, 7 properties were used at some point for quarantine purposes. Of these, five hotels were brought back under quarantine, after resuming normal operations for a brief period. As of Oct 20, these hotels continue to be used for quarantine reasons

Temporary Closed Hotels: 10 hotels were temporarily closed in September, of which 8 hotels (988 rooms) remained closed for almost the entire month, while the remaining 2 hotels were closed for a few days in September (632 rooms)

Yas Island Hotels: From September 4, all Yas Island hotels have stopped taking bookings from the general public due to the lockdown protocol required for the upcoming UFC Island 2.0 event in October. In September, two Yas Island properties were closed almost for the entire month (Centro Yas and Staybridge Suites)

RECENT SUPPLY ADDITIONS AND CLOSURES - 2020

CLOSED: JAN 2020

BIN MAJID TOWER 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

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GLOSSARY

SEPTEMBER 2020

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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