

ABU DHABI

HOTEL PERFORMANCE REPORT

AUGUST 2020

دائرة الثقافة والسياحة
DEPARTMENT OF CULTURE
AND TOURISM



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TABLE OF CONTENTS



OVERALL PERFORMANCE

PAGE 3



HOTEL GUESTS BY NATIONALITY

PAGE 4



PERFORMANCE BY REGION

PAGE 5



PERFORMANCE BY STAR RATING

PAGE 6



PERFORMANCE BY ABU DHABI ZONES

PAGE 7



OVERALL HOTEL SUPPLY

PAGE 8



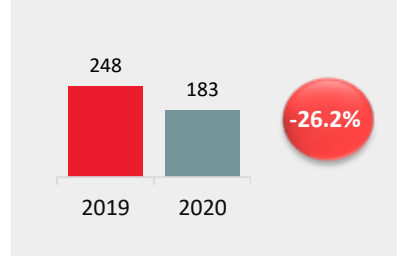
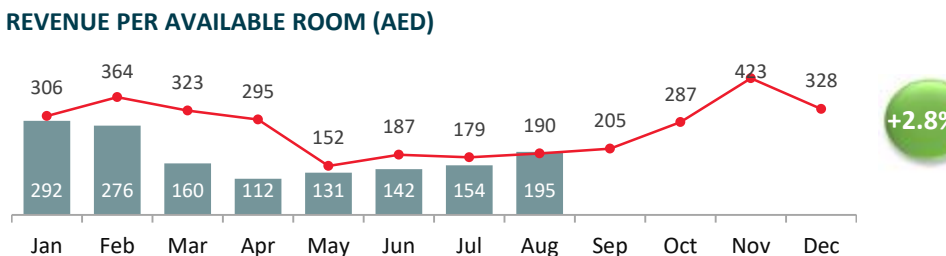
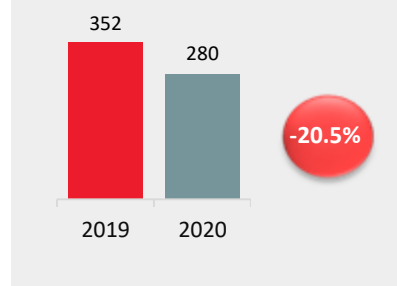
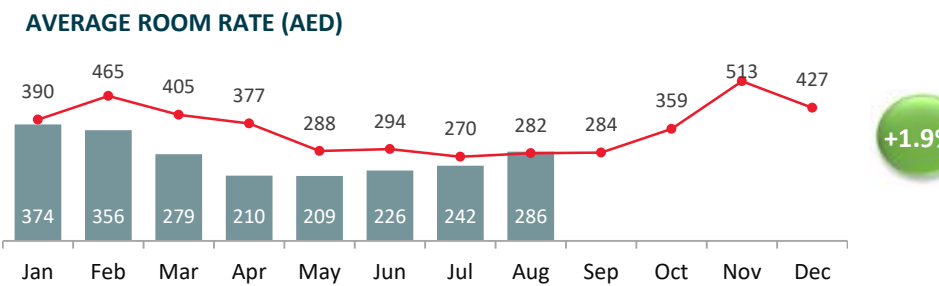
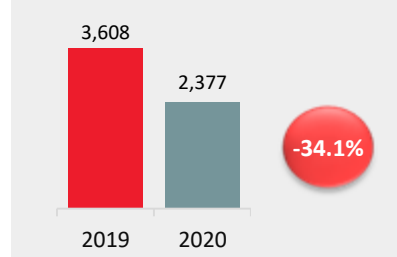
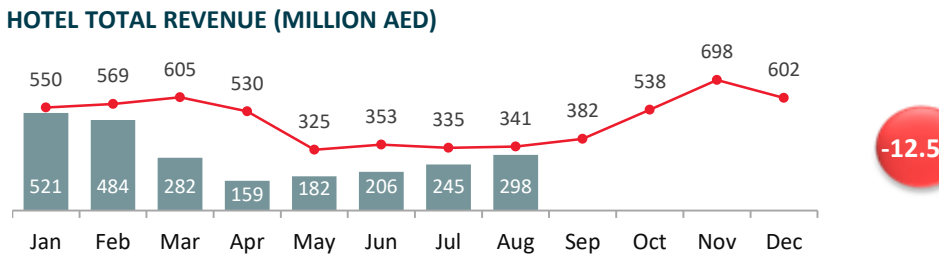
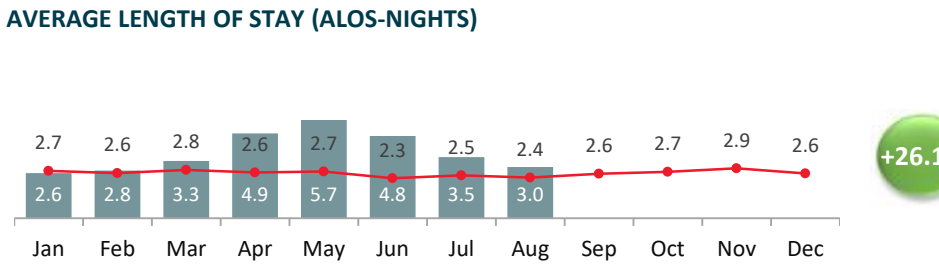
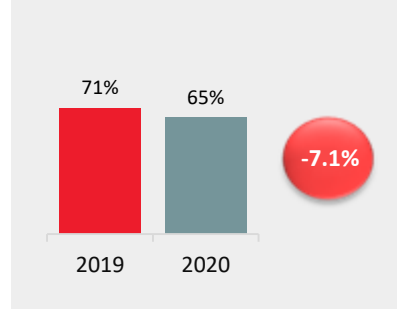
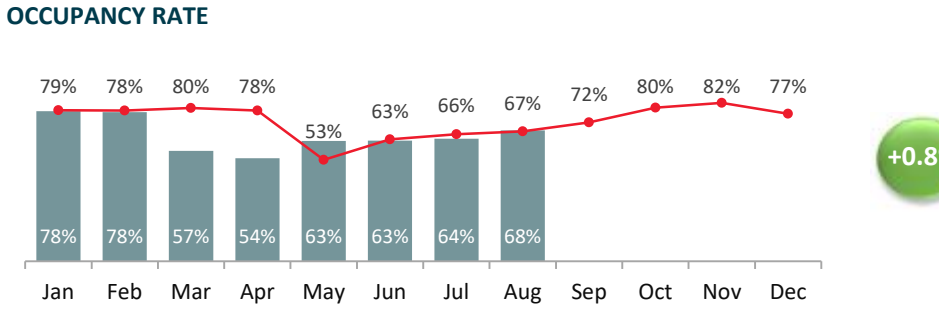
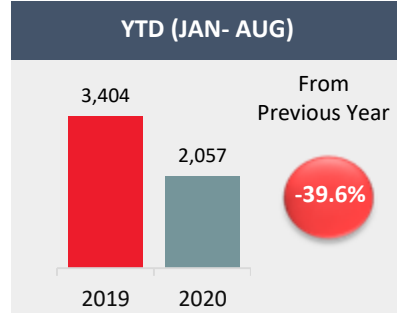
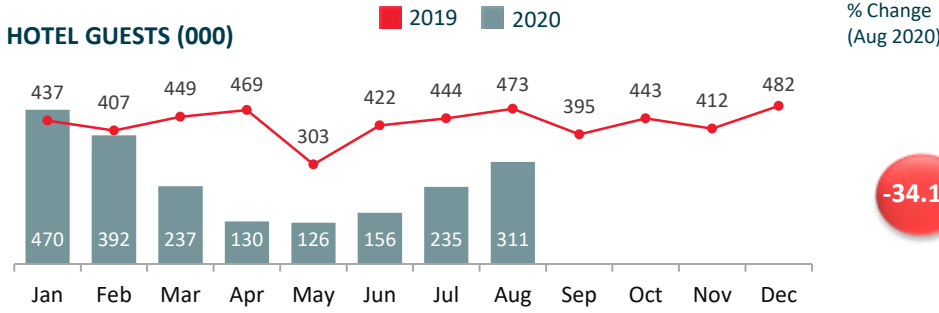
GLOSSARY

PAGE 12

OVERALL PERFORMANCE

AUGUST 2020

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HOTEL GUESTS BY NATIONALITY

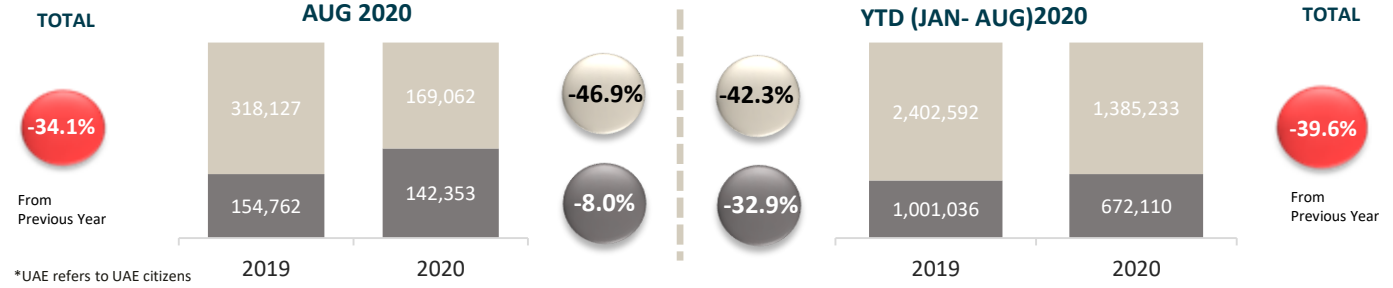
AUGUST 2020



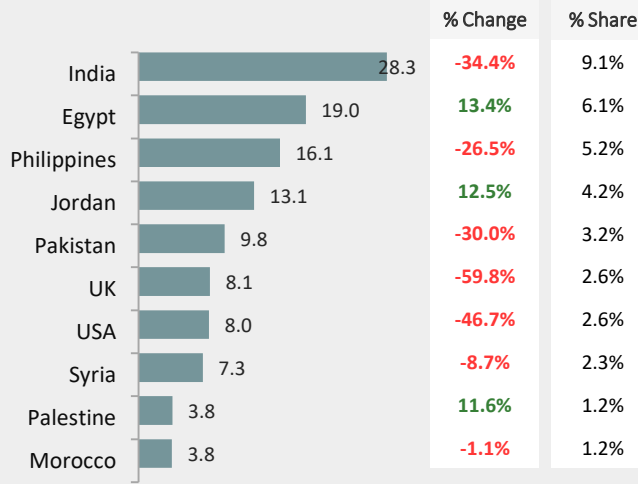
UAE VS. NON-UAE HOTEL GUESTS

311,415

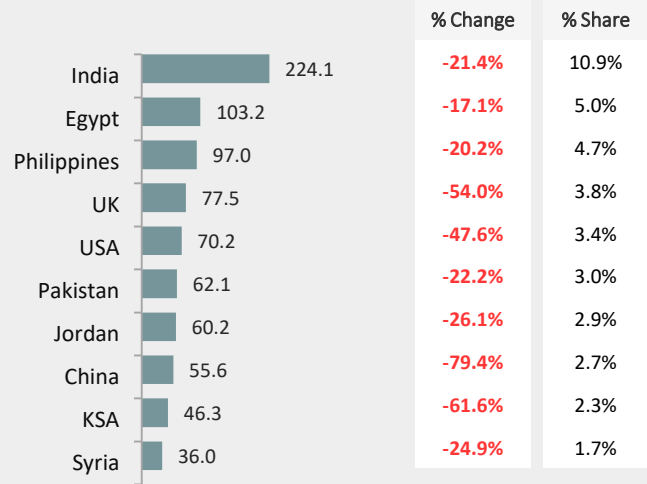
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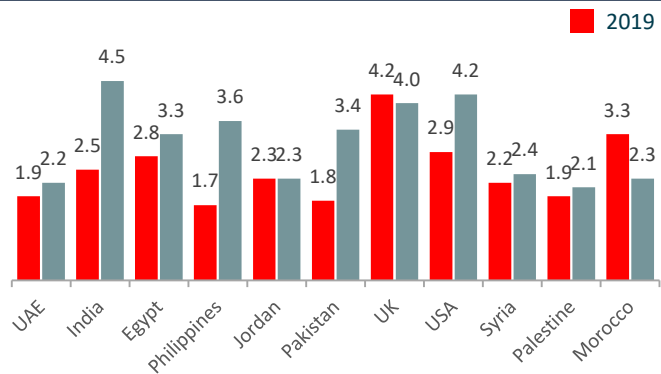
TOP 10 NON-UAE NATIONALITIES (000s) – AUG 2020



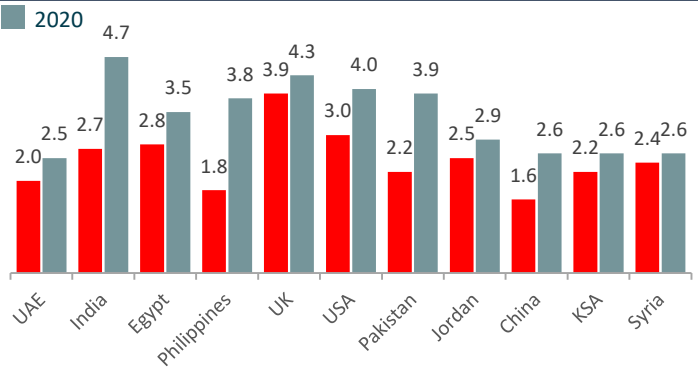
TOP 10 NON-UAE NATIONALITIES (000s) YTD AUG 2020



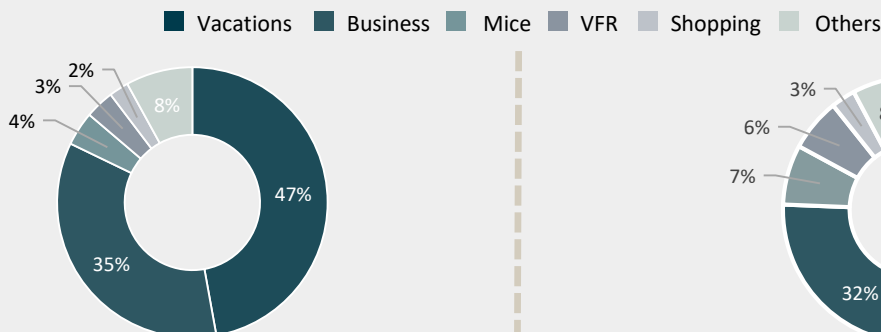
ALOS (NIGHTS) – AUG 2020



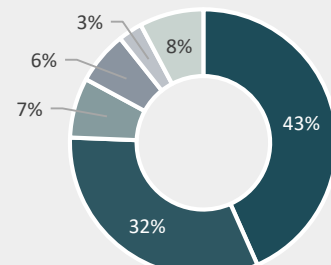
ALOS (NIGHTS) – YTD AUG 2020



PURPOSE OF VISIT- AUG 2020



PURPOSE OF VISIT – YTD AUG 2020



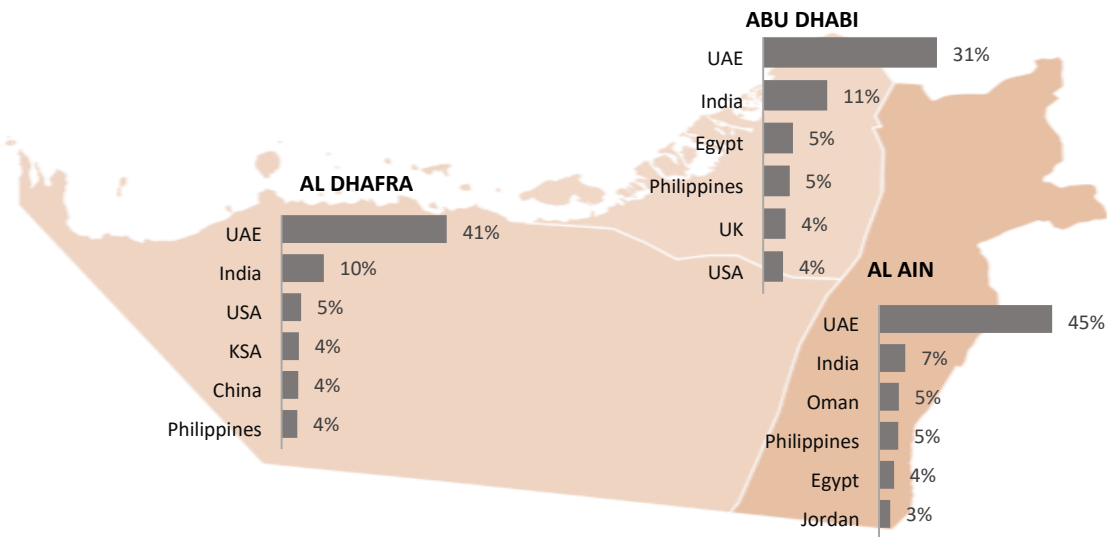
PERFORMANCE BY REGION

AUGUST 2020

REGIONAL PERFORMANCE – AUG 2020

KEY INDICATORS	ABU DHABI			AL AIN			AL DHAFRA		
	Actual	% Change		Actual	% Change		Actual	% Change	
GUESTS	265,787	-35.5%	▼	35,960	-29.2%	▼	9,668	-4.2%	▼
OCCUPANCY RATE	69%	-0.1%	▼	69%	5.4%	▲	53%	40.3%	▲
ALOS DAYS	3.1	26.4%	▲	2.2	29.4%	▲	2.5	28.8%	▲
REVENUES (M AED)	262.8	-14.9%	▼	20.0	-10.7%	▼	15.3	57.9%	▲
ARR (AED)	287	2.3%	▲	250	-4.0%	▼	405	-11.2%	▼
REVPAR (AED)	197	2.2%	▲	172	1.2%	▲	216	24.6%	▲

TOP NATIONALITIES ACROSS REGIONS – YTD AUG 2020



REGIONAL PERFORMANCE – YTD AUG 2020

KEY INDICATORS	ABU DHABI			AL AIN			AL DHAFRA		
	Actual	% Change		Actual	% Change		Actual	% Change	
GUESTS	1,779,699	-40.3%	▼	208,768	-36.9%	▼	68,876	-24.1%	▼
OCCUPANCY RATE	66%	-8.8%	▼	61%	0.2%	▲	63%	39.3%	▲
ALOS DAYS	3.5	32.3%	▲	2.3	25.0%	▲	2.6	21.6%	▲
REVENUES (M AED)	2,094.5	-35.9%	▼	126.0	-34.1%	▼	156.5	5.4%	▲
ARR (AED)	277	-21.0%	▼	219	-21.0%	▼	548	-18.6%	▼
REVPAR (AED)	182	-27.9%	▼	133	-20.8%	▼	343	13.4%	▲

PERFORMANCE BY STAR RATING

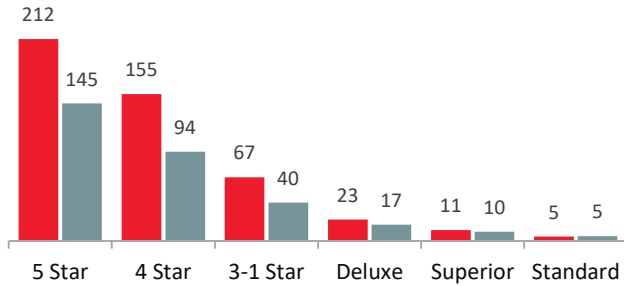
AUGUST 2020

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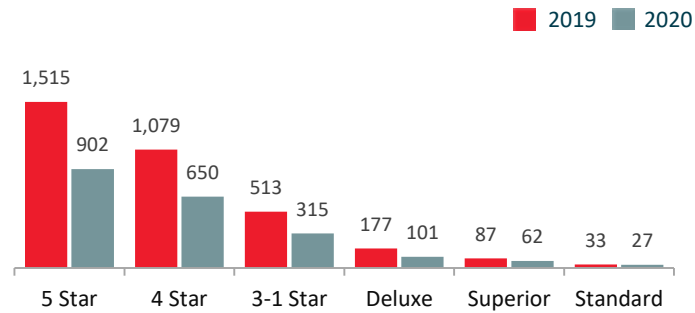


PERFORMANCE ACROSS KEY INDICATORS

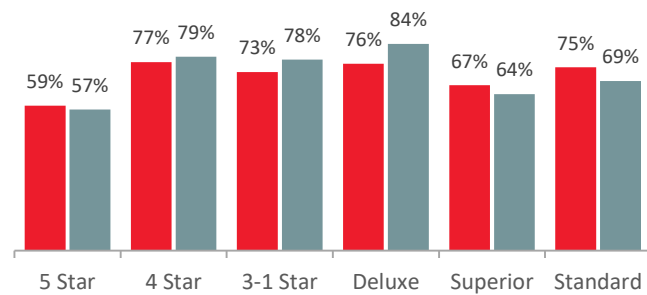
HOTEL GUESTS – AUG 2020



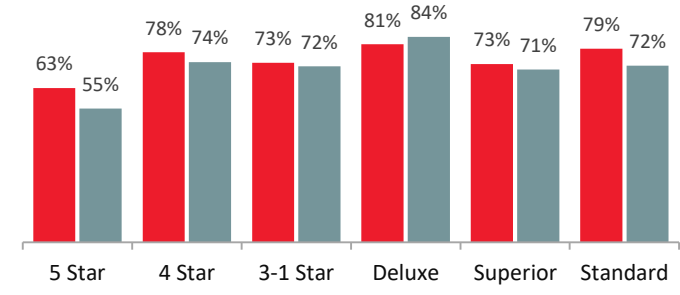
HOTEL GUESTS – YTD AUG 2020



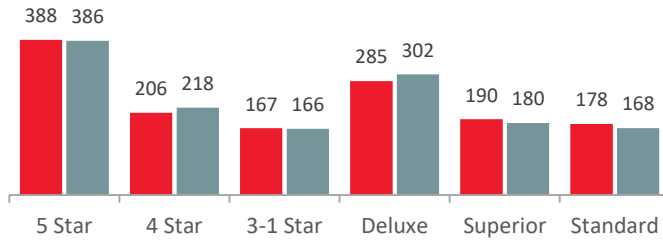
HOTEL OCCUPANCY – AUG 2020



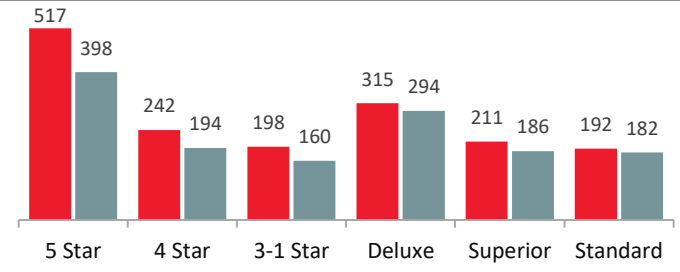
HOTEL OCCUPANCY – YTD AUG 2020



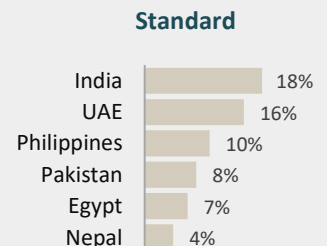
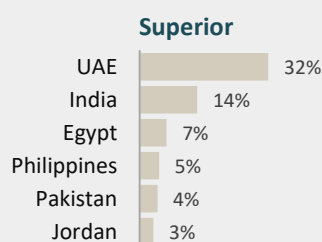
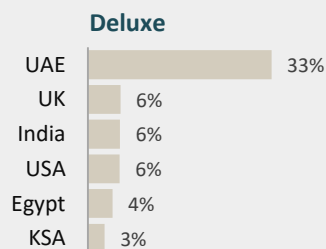
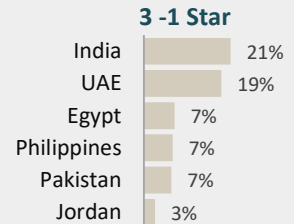
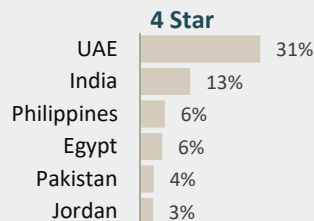
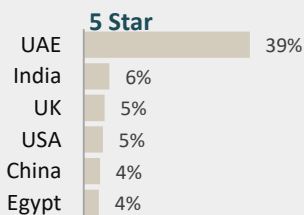
HOTEL ARR (AED) – AUG 2020



HOTEL ARR (AED) – YTD AUG 2020



TOP NATIONALITIES – YTD AUG 2020



YAS ISLAND PERFORMANCE

AUGUST 2020

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HOTEL SUPPLY



7
HOTELS



2,259



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

Note: Centro Yas, Crowne Plaza and Park Inn were closed for the entire month of August.

OVERALL PERFORMANCE

KEY INDICATORS	AUG 2020		YTD AUG 2020	
	Actual	% Change	Actual	% Change
GUESTS	15,386	-71.2% ▼	99,240	-66.4% ▼
OCCUPANCY RATE	41%	-50.5% ▼	51%	-35.2% ▼
ALOS NIGHTS	2.0	-6.3% ▼	3.5	43.5% ▲
REVENUES (M AED)	9.7	-64.1% ▼	112.7	-53.8% ▼
ARR (AED)	290	-6.9% ▼	264	-21.4% ▼
REVPAR (AED)	118	-53.9% ▼	136	-49.1% ▼

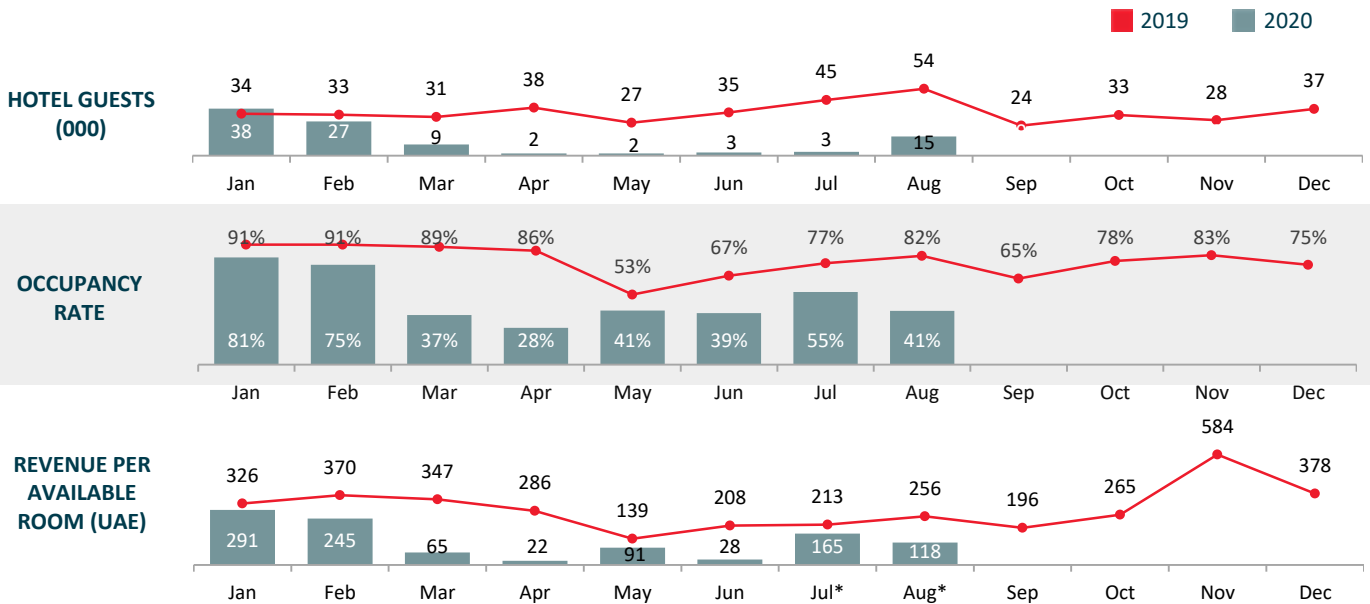
TOP NATIONALITIES (000s) – AUG 2020

Nationality	000s	% Change	% Share
UAE	6.5	-56.9%	42.4%
Egypt	1.6	-17.2%	10.1%
Jordan	1.1	-22.7%	7.3%
UK	0.8	-69.5%	5.1%
India	0.7	-87.6%	4.4%
Philippines	0.5	-67.1%	3.2%
Syria	0.5	-46.3%	3.2%
USA	0.4	-62.9%	2.8%
Palestine	0.3	-16.3%	1.9%
Morocco	0.3	59.6%	1.7%
South Africa	0.3	-45.0%	1.7%

TOP NATIONALITIES (000s) – YTD AUG 2020

Nationality	000s	Change %	% Share
UAE	25.5	-65.7%	25.7%
India	12.4	-65.1%	12.5%
UK	7.2	-67.8%	7.3%
KSA	5.8	-68.1%	5.8%
China	4.1	-79.8%	4.1%
Egypt	3.9	-50.3%	3.9%
USA	3.8	-61.5%	3.8%
Philippines	2.5	-76.3%	2.5%
Jordan	2.3	-58.7%	2.4%
France	1.7	-50.1%	1.7%
Pakistan	1.6	-73.6%	1.7%

MONTHLY TRENDS



SAADIYAT & NICHE AREAS PERFORMANCE

AUGUST 2020

HOTEL SUPPLY



6

HOTELS



1,755



OVERALL PERFORMANCE

KEY INDICATORS	AUG 2020		YTD AUG 2020	
	Actual	% Change	Actual	% Change
GUESTS	24,350	48.8% ▲	91,233	-17.9% ▼
OCCUPANCY RATE	48%	-12.7% ▼	38%	-38.0% ▼
ALOS NIGHTS	2.0	-43.4% ▼	2.9	-30.3% ▼
REVENUES (M AED)	41.3	16.4% ▲	271.2	-37.0% ▼
ARR (AED)	980	20.7% ▲	989	-3.2% ▼
REVPAR (AED)	468	5.3% ▲	373	-40.0% ▼

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

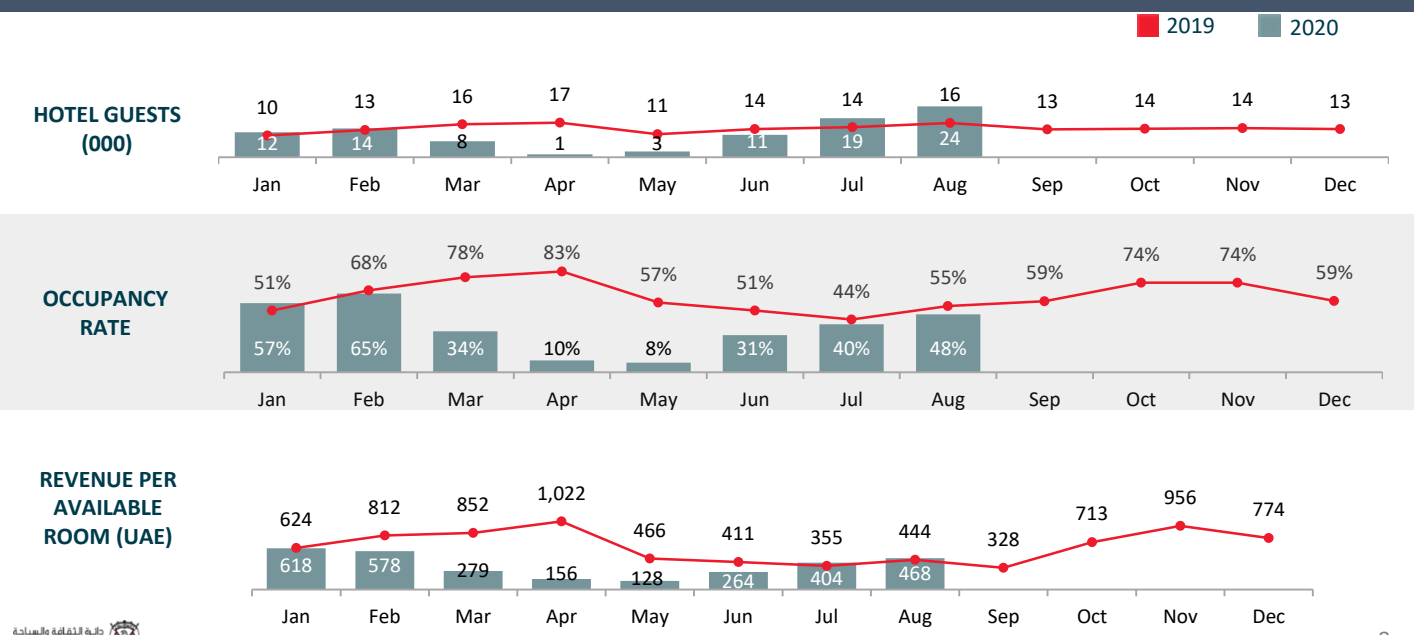
TOP NATIONALITIES (000s) – AUG 2020

Nationality	Count (000s)	% Change	% Share
UAE	16.4	120.1%	67.4%
UK	1.1	-42.9%	4.6%
Jordan	0.7	283.7%	2.8%
Egypt	0.7	206.1%	2.7%
Lebanon	0.6	236.0%	2.4%
USA	0.5	114.2%	2.0%
Canada	0.4	351.2%	1.6%
Syria	0.3	284.5%	1.3%
France	0.3	-4.7%	1.2%
Philippines	0.2	-6.8%	1.0%
Kazakhstan	0.2	-70.9%	0.9%

TOP NATIONALITIES (000s) – YTD AUG 2020

Nationality	Count (000s)	% Change	% Share
UAE	46.3	42.0%	50.7%
UK	6.9	-46.1%	7.5%
Germany	3.7	-68.9%	4.1%
Russia	3.6	-43.7%	4.0%
France	2.4	-30.7%	2.6%
USA	2.4	-16.2%	2.6%
Egypt	1.9	52.2%	2.1%
Jordan	1.8	66.2%	2.0%
Lebanon	1.8	25.7%	2.0%
Italy	1.3	-55.1%	1.5%
KSA	1.3	-59.7%	1.4%

MONTHLY TRENDS



ADNEC PERFORMANCE

AUGUST 2020

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HOTEL SUPPLY



6

HOTELS



1,827



STAR RATING

5 STAR

1 HOTELS
189 ROOMS

4 STAR

2 HOTELS
723 ROOMS

1-3 STAR

2 HOTELS
656 ROOMS

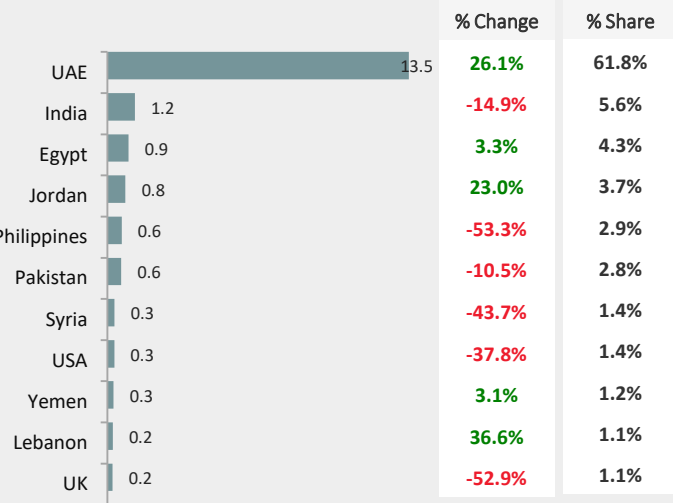
APTS

1 HOTELS
259 ROOMS

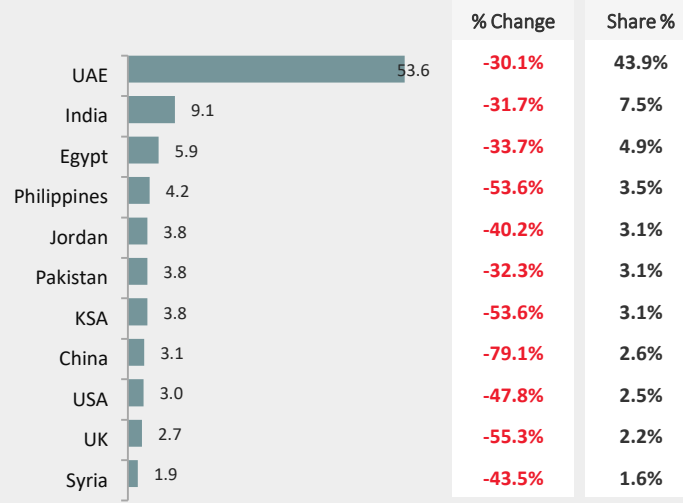
OVERALL PERFORMANCE

KEY INDICATORS	AUG 2020		YTD AUG 2020	
	Actual	% Change	Actual	% Change
GUESTS	21,917	-14.3%	122,029	-42.5%
OCCUPANCY RATE	83%	6.5%	76%	-5.9%
ALOS NIGHTS	3.4	27.8%	4.2	39.1%
REVENUES (M AED)	10.5	-9.1%	98.6	-20.1%
ARR (AED)	172	-9.6%	206	-17.8%
REVPAR (AED)	143	-3.8%	156	-22.6%

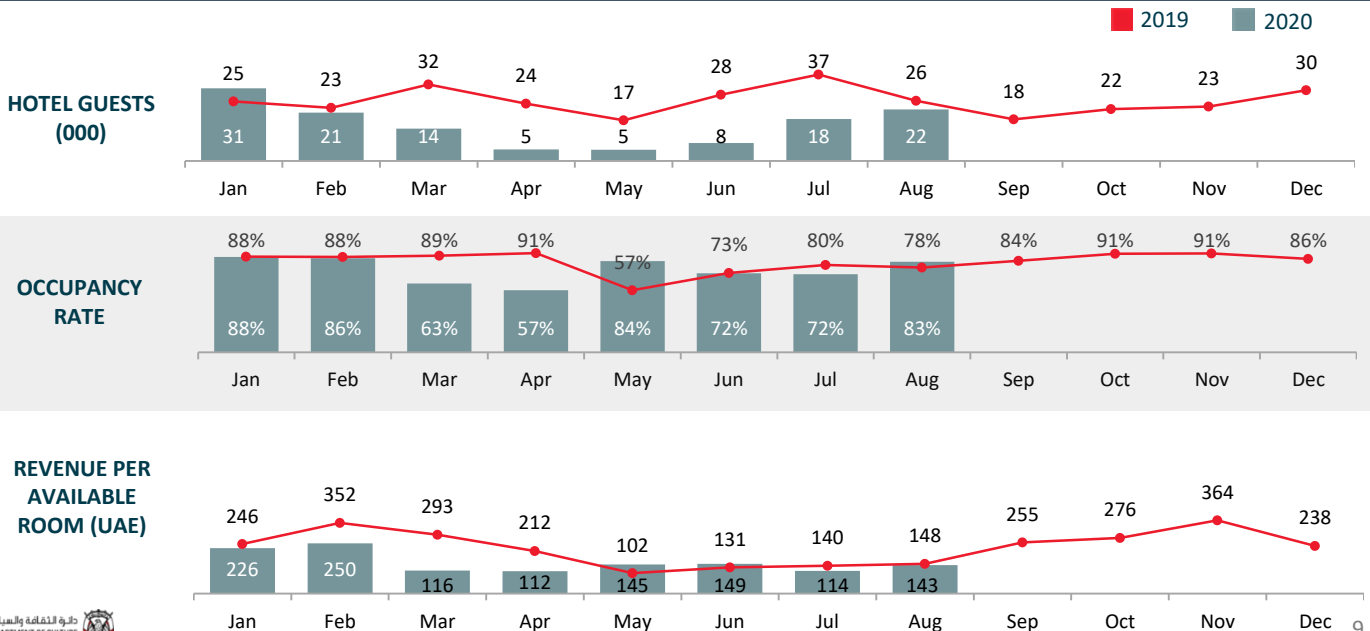
TOP NATIONALITIES (000s) – AUG 2020



TOP NATIONALITIES (000s) – YTD AUG 2020



MONTHLY TRENDS



ABU DHABI ISLAND PERFORMANCE*

AUGUST 2020

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HOTEL SUPPLY



117

HOTELS



23,123



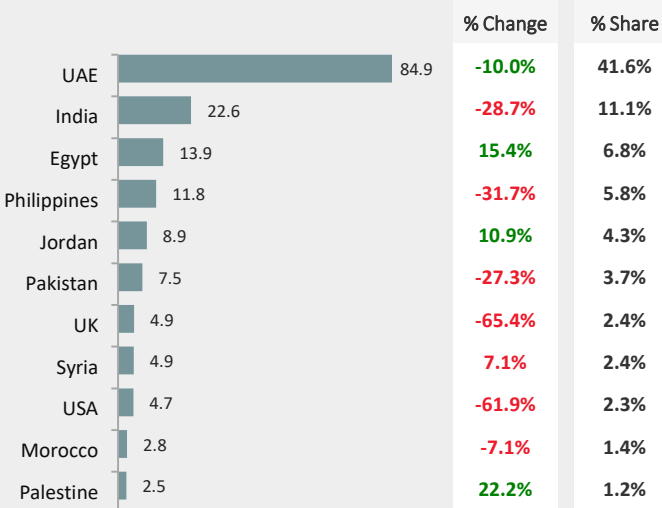
STAR RATING

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

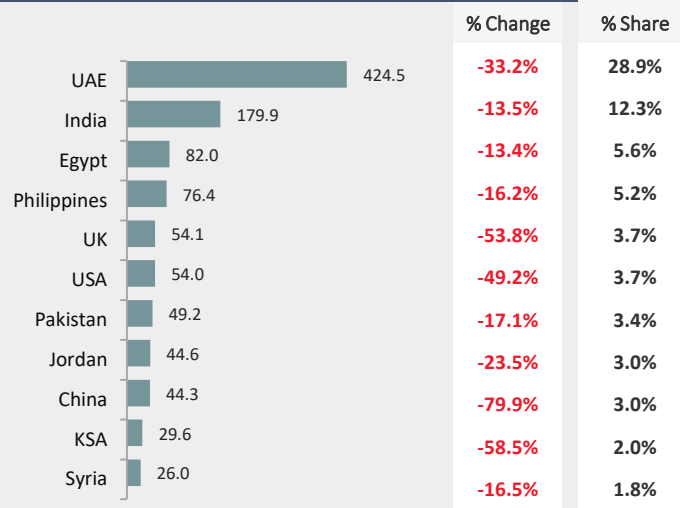
OVERALL PERFORMANCE

KEY INDICATORS	AUG 2020		YTD AUG 2020	
	Actual	% Change	Actual	% Change
GUESTS	204,134	-35.5%	1,467,197	-37.9%
OCCUPANCY RATE	71%	4.7%	68%	-4.8%
ALOS NIGHTS	3.3	35.1%	3.5	35.6%
REVENUES (M AED)	187.6	-20.1%	1,611.6	-34.8%
ARR (AED)	243	-4.1%	256	-19.9%
REVPAR (AED)	172	0.4%	175	-23.7%

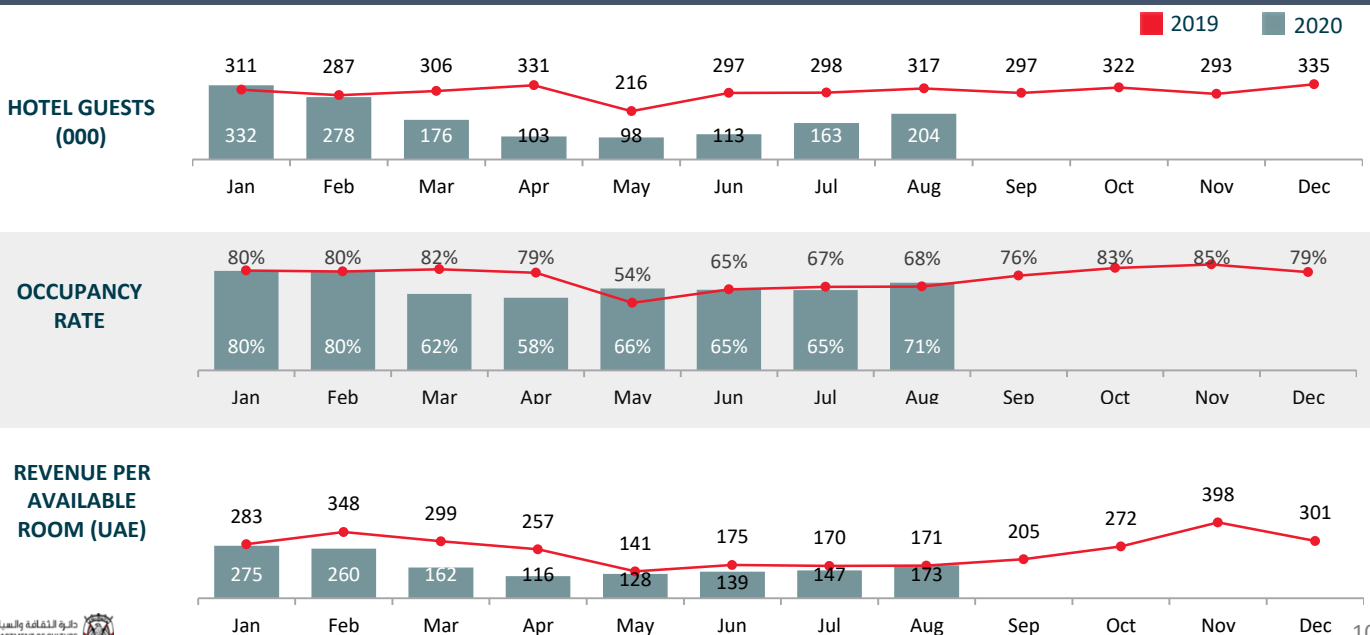
TOP NATIONALITIES (000s) – AUG 2020



TOP NATIONALITIES (000s) – YTD AUG 2020



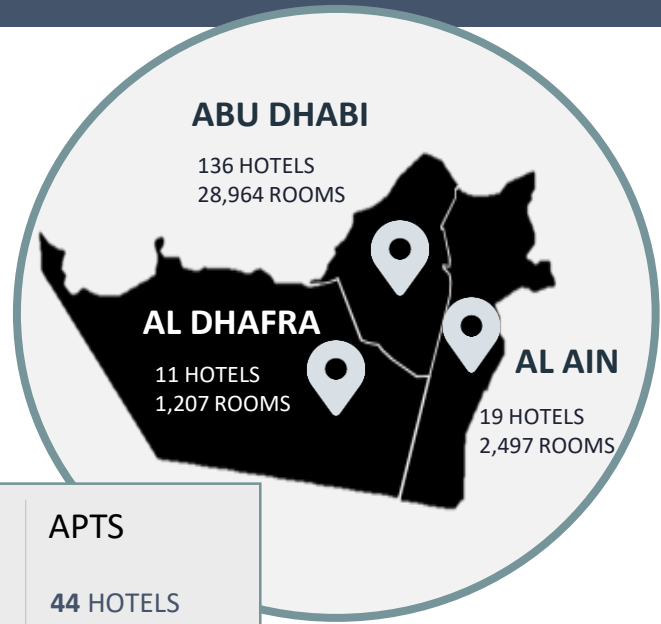
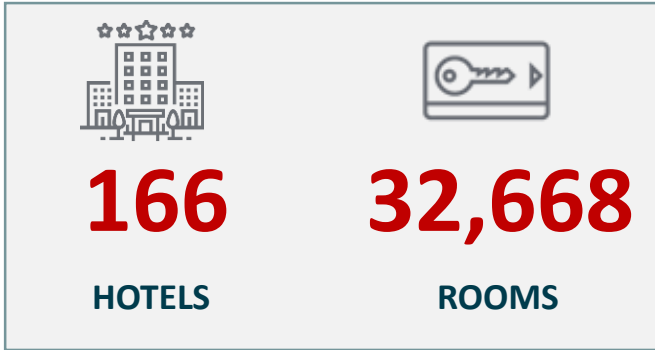
MONTHLY TRENDS



HOTEL SUPPLY

AUGUST 2020

HOTEL SUPPLY AS OF AUGUST



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 August, only 3 properties across the Abu Dhabi emirate were used at some point for quarantine purposes. As of September 15, 4 hotels are currently being used for quarantine purposes.

Temporary Closed Hotels: 9 hotels were temporarily closed in August, all remained closed for the entire month

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 August three Yas Island properties were closed for the full month (Centro Yas, Crowne Plaza and Park Inn).

RECENT SUPPLY ADDITIONS AND CLOSURES - 2020



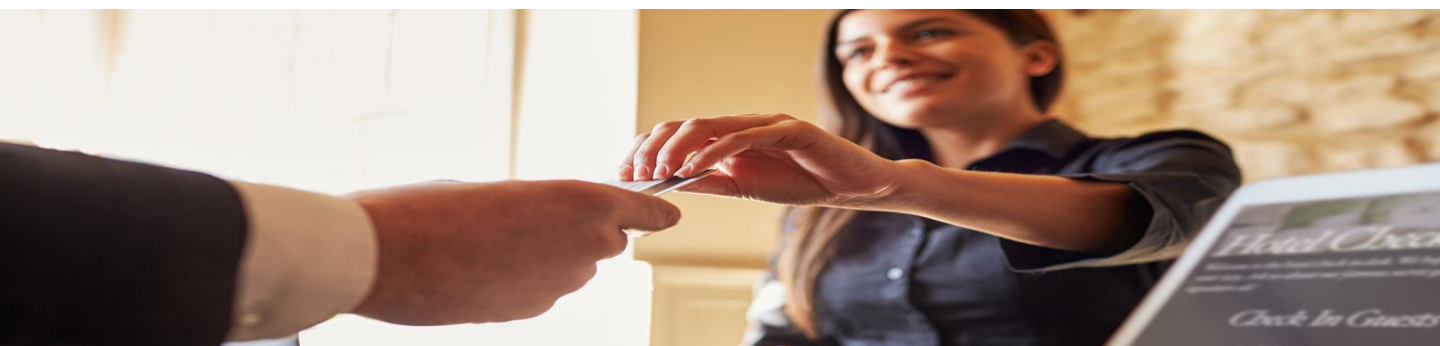
CLOSED: JAN 2020

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



MAY 2019 GLOSSARY



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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