ABU DHABI

HOTEL PERFORMANCE REPORT

JUNE 2020

دائرة الثقافة والسياحة
DEPARTMENT OF CULTURE AND TOURISM

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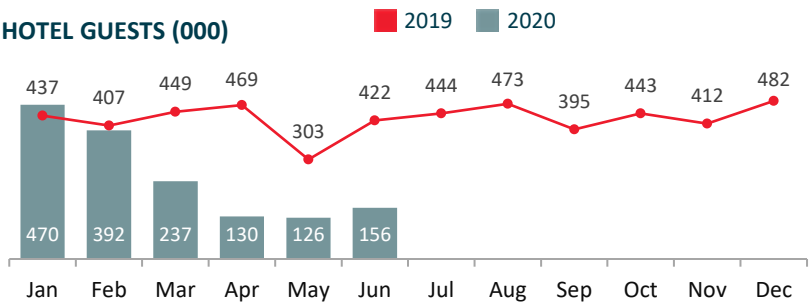
OVERALL PERFORMANCE

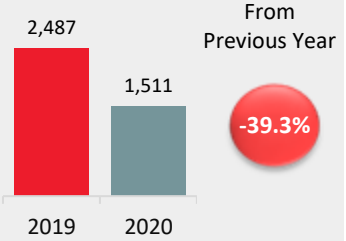
JUNE 2020

HOTEL GUESTS (000)



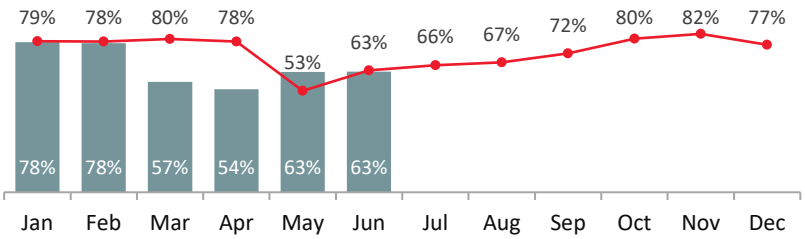
% Change (Jun 2020): -63.0%

YTD (JAN- JUN)

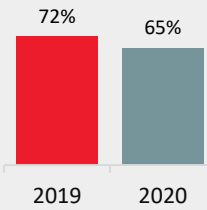


From Previous Year: -39.3%

OCCUPANCY RATE

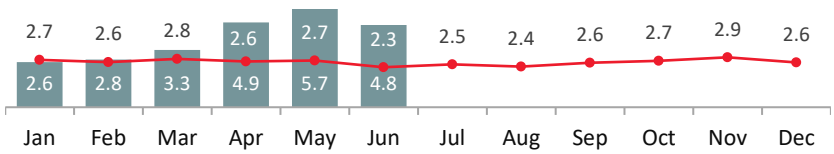


-1.2%

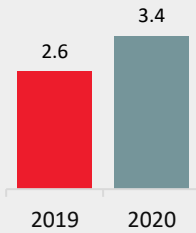


-9.0%

AVERAGE LENGTH OF STAY (ALOS-NIGHTS)

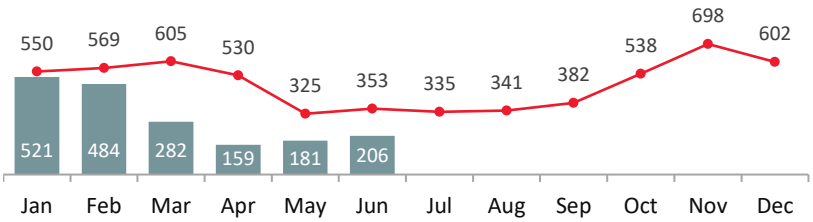


+106%

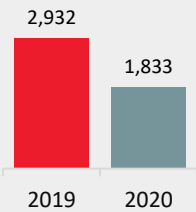


+30.4%

HOTEL TOTAL REVENUE (MILLION AED)

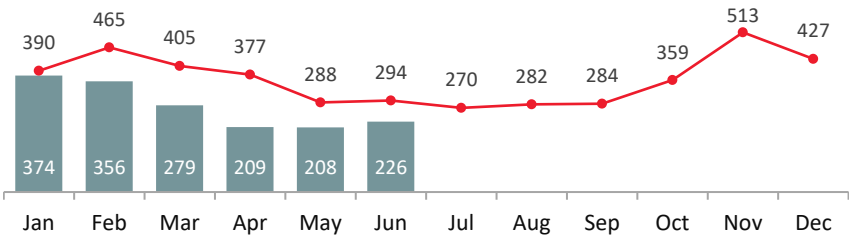


-41.7%

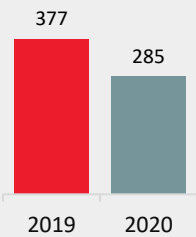


-37.5%

AVERAGE ROOM RATE (AED)

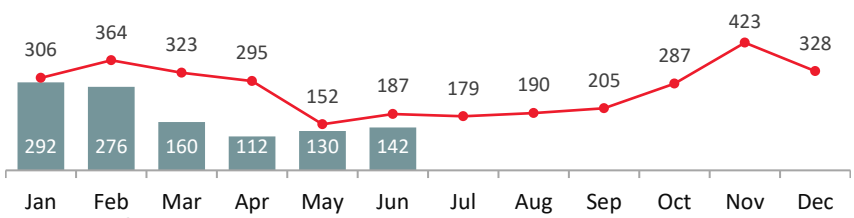


-23.2%

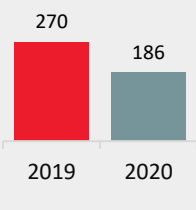


-24.3%

REVENUE PER AVAILABLE ROOM (AED)



-24.1%



-31.1%

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HOTEL GUESTS BY NATIONALITY

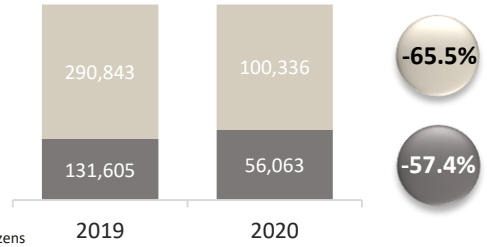
JUNE 2020

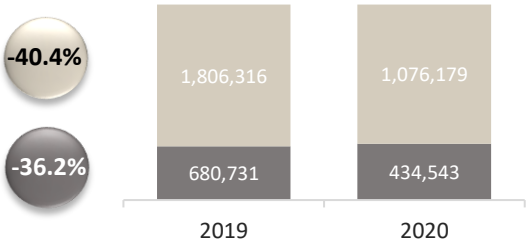
UAE VS. NON-UAE HOTEL GUESTS

156,399 TOTAL

-63.0% From Previous Year

*UAE refers to UAE citizens





1,510,722 TOTAL

-39.3% From Previous Year

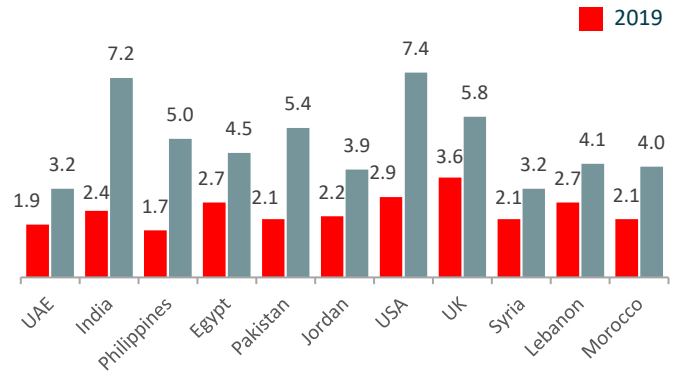
TOP 10 NON-UAE NATIONALITIES (000s) – JUN 2020

		% Change	% Share
India	22.0	-52.0%	14.0%
Philippines	13.6	-33.4%	8.7%
Egypt	8.3	-53.2%	5.3%
Pakistan	7.2	-37.7%	4.6%
Jordan	4.7	-60.2%	3.0%
USA	3.5	-77.2%	2.2%
UK	3.2	-80.5%	2.0%
Syria	3.1	-57.1%	2.0%
Lebanon	2.2	-50.4%	1.4%
Morocco	2.2	-39.4%	1.4%

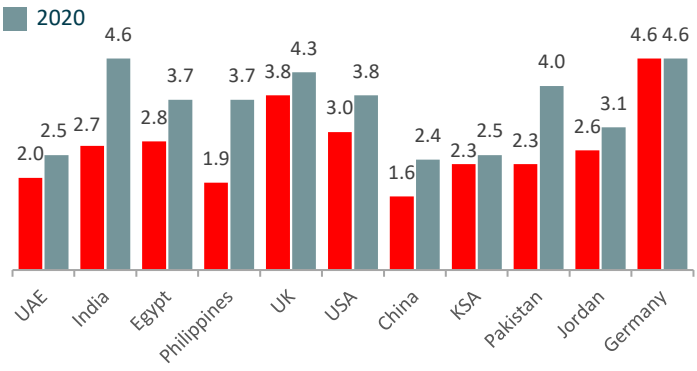
TOP 10 NON-UAE NATIONALITIES (000s) YTD JUN 2020

		% Change	% Share
India	171.6	-17.3%	11.4%
Egypt	69.8	-23.0%	4.6%
Philippines	66.9	-21.1%	4.4%
UK	62.5	-52.8%	4.1%
USA	56.4	-46.2%	3.7%
China	53.7	-74.3%	3.6%
KSA	45.1	-37.0%	3.0%
Pakistan	43.4	-20.7%	2.9%
Jordan	37.5	-36.2%	2.5%
Germany	29.0	-59.1%	1.9%

ALOS (NIGHTS) – JUN 2020



ALOS (NIGHTS) – YTD JUN 2020



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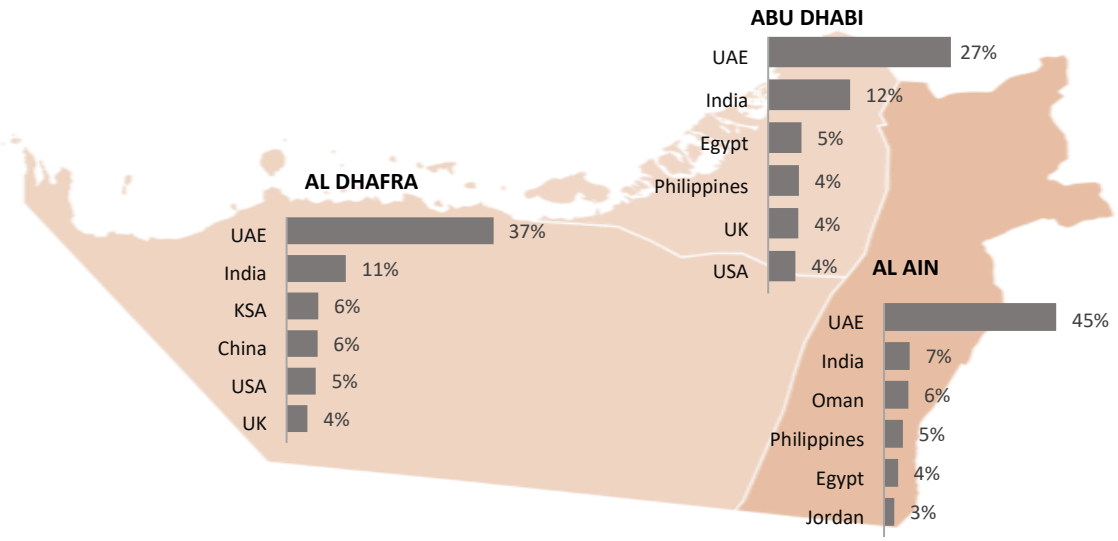
PERFORMANCE BY REGION

JUNE 2020

REGIONAL PERFORMANCE – JUN 2020

KEY INDICATORS	ABU DHABI		AL AIN		AL DHAFRA	
	Actual	% Change	Actual	% Change	Actual	% Change
GUESTS	133,740	-64.2% ▼	17,538	-54.0% ▼	5,121	-53.4% ▼
OCCUPANCY RATE	62%	-4.6% ▼	70%	31.7% ▲	65%	50.6% ▲
ALOS DAYS	5.0	110.0% ▲	3.3	100.9% ▲	3.4	63.6% ▲
REVENUES (M AED)	175.0	-45.1% ▼	13.0	-42.4% ▼	17.6	57.1% ▲
ARR (AED)	225	-22.6% ▼	182	-38.1% ▼	418	-11.0% ▼
REVPAR (AED)	139	-26.2% ▼	127	-18.5% ▼	272	34.1% ▲

TOP NATIONALITIES ACROSS REGIONS – YTD JUN 2020



REGIONAL PERFORMANCE – YTD JUN 2020

KEY INDICATORS	ABU DHABI		AL AIN		AL DHAFRA	
	Actual	% Change	Actual	% Change	Actual	% Change
GUESTS	1,310,778	-39.8% ▼	149,885	-37.1% ▼	50,059	-30.6% ▼
OCCUPANCY RATE	66%	-10.5% ▼	59%	-2.8% ▼	63%	34.5% ▲
ALOS DAYS	3.6	31.9% ▲	2.3	19.2% ▲	2.6	21.9% ▲
REVENUES (M AED)	1,620.1	-39.0% ▼	91.2	-37.9% ▼	121.3	-6.2% ▼
ARR (AED)	281	-24.9% ▼	213	-25.5% ▼	600	-17.9% ▼
REVPAR (AED)	185	-32.8% ▼	125	-27.6% ▼	375	10.5% ▲

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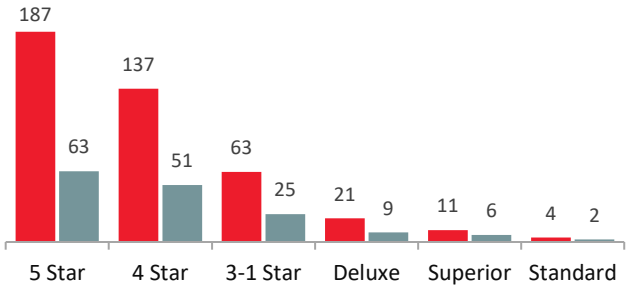
PERFORMANCE BY STAR RATING

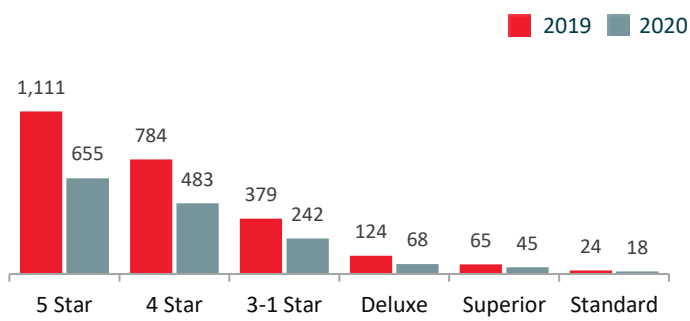
JUNE 2020

PERFORMANCE ACROSS KEY INDICATORS

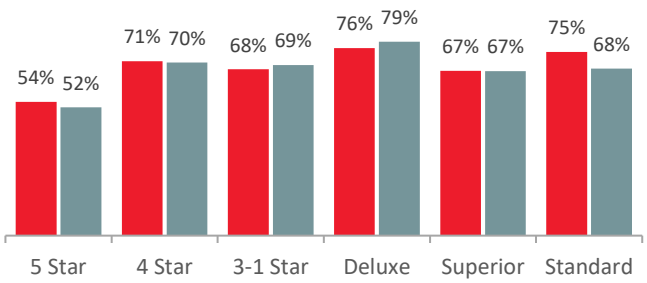
HOTEL GUESTS – JUN 2020



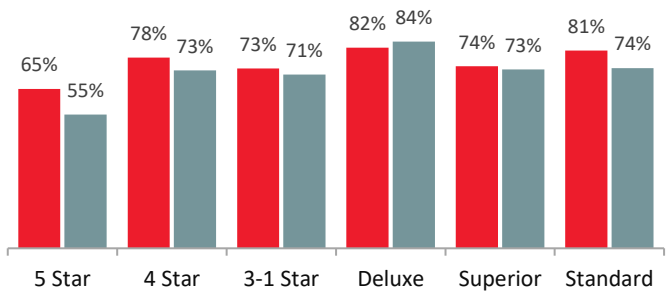
HOTEL GUESTS – YTD JUN 2020



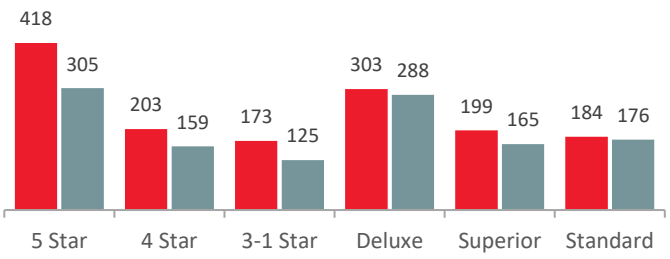
HOTEL OCCUPANCY– JUN 2020



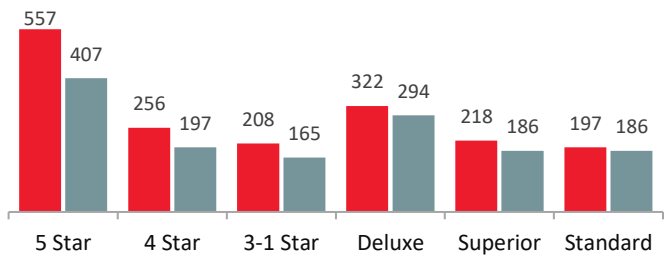
HOTEL OCCUPANCY – YTD JUN 2020



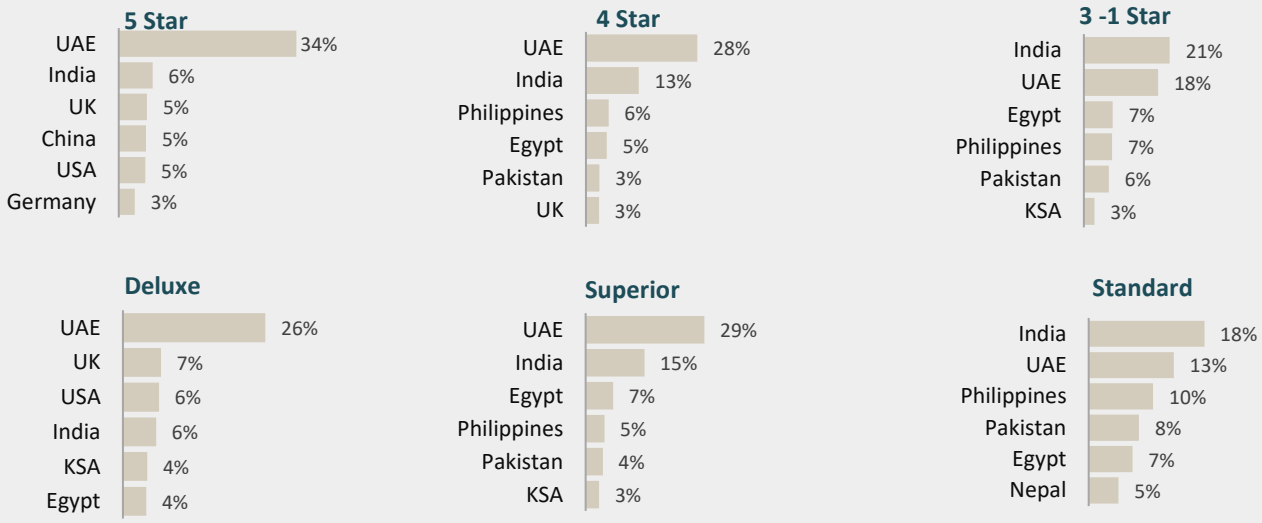
HOTEL ARR (AED)– JUN 2020



HOTEL ARR (AED) –YTD JUN 2020



TOP NATIONALITIES – YTD JUN 2020



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YAS ISLAND PERFORMANCE

JUNE 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	JUN 2020		YTD JUN 2020	
	Actual	% Change	Actual	% Change
GUESTS	2,590	-92.5% ▼	80,556	-59.2% ▼
OCCUPANCY RATE	39%	-42.1% ▼	52%	-34.4% ▼
ALOS NIGHTS	11.5	415.9% ▲	3.4	28.9% ▲
REVENUES (M AED)	2.6	-88.8% ▼	83.7	-56.7% ▼
ARR (AED)	78	-74.6% ▼	256	-27.1% ▼
REVPAR (AED)	31	-85.3% ▼	133	-52.2% ▼

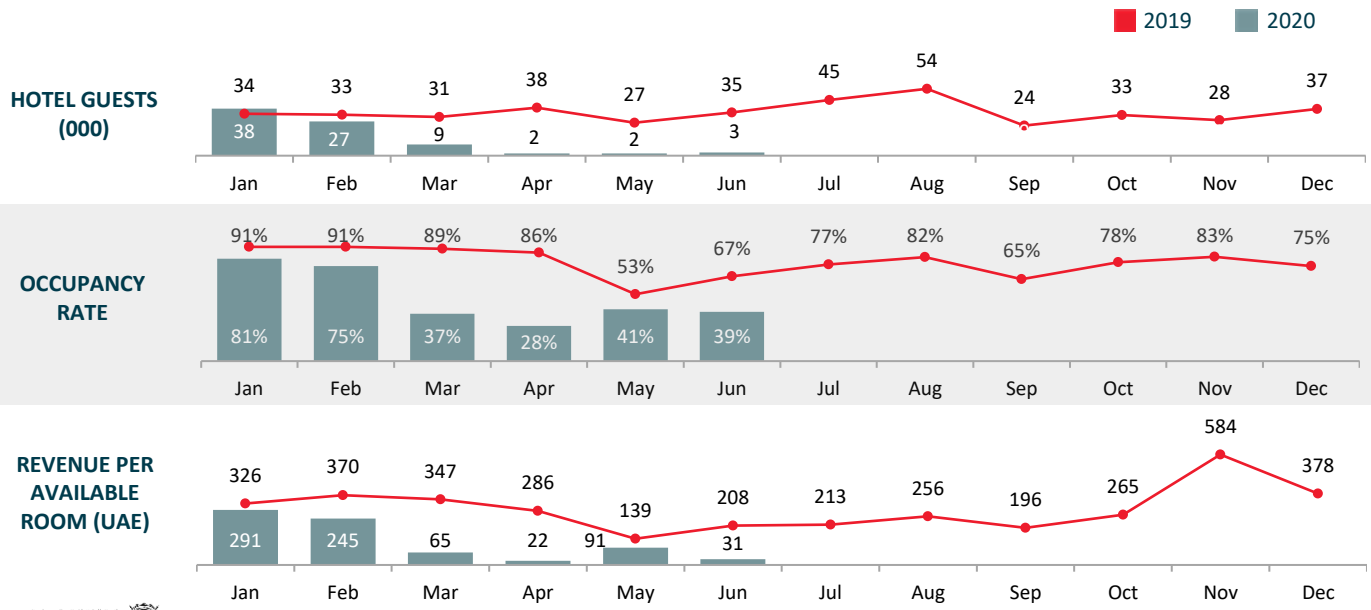
TOP NATIONALITIES (000s) – JUN 2020

		% Change	% Share
India	0.61	-92.0%	23.5%
UAE	0.45	-91.4%	17.3%
Cuba	0.43	-	16.4%
Philippines	0.21	-86.7%	8.0%
Pakistan	0.15	-87.3%	5.8%
Nepal	0.11	1,020.0%	4.3%
Sri Lanka	0.06	-61.2%	2.2%
Egypt	0.05	-96.7%	1.9%
UK	0.05	-97.9%	1.9%
Jordan	0.04	-96.2%	1.7%
USA	0.04	-96.8%	1.4%

TOP NATIONALITIES (000s) – YTD JUN 2020

		% Change	% Share
UAE	18.6	-56.4%	23.0%
India	11.6	-56.3%	14.3%
UK	6.2	-64.8%	7.7%
KSA	5.8	-35.0%	7.1%
China	4.0	-71.1%	5.0%
USA	3.1	-59.7%	3.8%
Egypt	2.0	-58.7%	2.5%
Philippines	1.7	-77.7%	2.1%
France	1.7	-42.4%	2.0%
Kuwait	1.3	-60.8%	1.6%
South Africa	1.3	-59.0%	1.6%

MONTHLY TRENDS



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SAADIYAT & NICHE AREAS PERFORMANCE

JUNE 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	JUN 2020 Actual	JUN 2020 % Change	YTD JUN 2020 Actual	YTD JUN 2020 % Change
GUESTS	10,746	-20.5%	48,178	-40.1%
OCCUPANCY RATE	31%	-39.8%	36%	-45.1%
ALOS NIGHTS	2.0	-42.6%	3.8	-15.6%
REVENUES (M AED)	20.0	-49.5%	197.6	-45.9%
ARR (AED)	861	6.6%	986	-8.4%
REVPAR (AED)	264	-35.8%	350	-49.7%

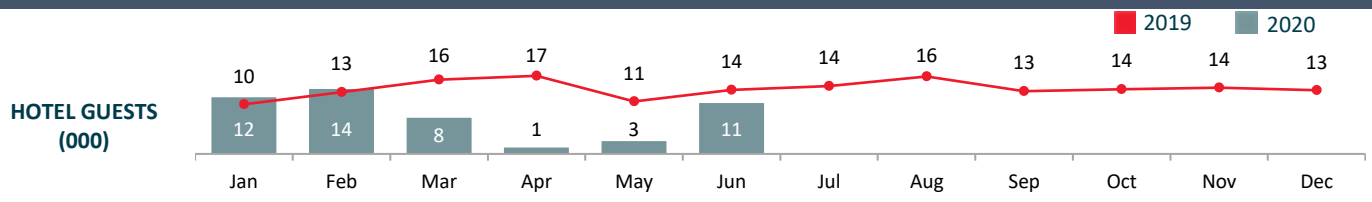
TOP NATIONALITIES (000s) – JUN 2020

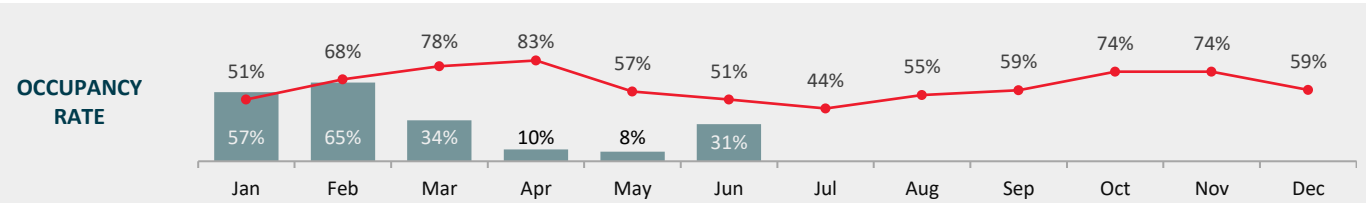
		% Change	% Share
UAE	7.78	67.0%	72.4%
UK	0.44	-49.0%	4.1%
Lebanon	0.32	-17.4%	2.9%
USA	0.25	-20.1%	2.4%
France	0.17	-56.7%	1.6%
Syria	0.13	-15.3%	1.2%
Canada	0.13	-10.8%	1.2%
Jordan	0.13	-59.4%	1.2%
Ireland	0.12	10.6%	1.1%
Italy	0.09	-30.8%	0.8%
Egypt	0.09	-74.3%	0.8%

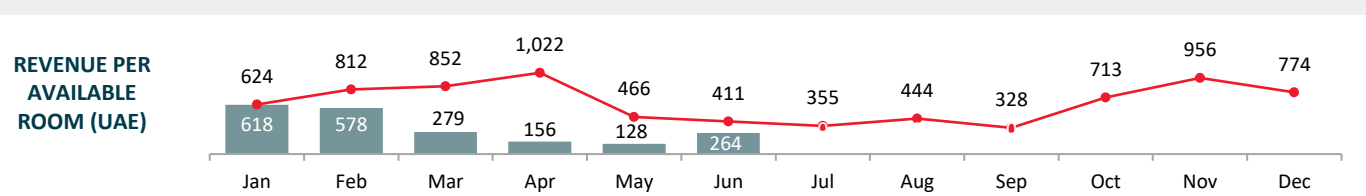
TOP NATIONALITIES (000s) – YTD JUN 2020

		% Change	% Share
UAE	17.9	4.6%	37.1%
UK	4.6	-51.6%	9.6%
Russia	3.5	-39.9%	7.3%
Germany	3.5	-66.3%	7.2%
France	1.9	-38.5%	3.9%
USA	1.3	-46.3%	2.8%
KSA	1.2	-38.3%	2.4%
Italy	1.1	-60.7%	2.2%
Switzerland	1.0	-56.7%	2.0%
Kazakhstan	0.9	-73.0%	1.9%
India	0.8	-64.5%	1.6%

MONTHLY TRENDS







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ADNEC PERFORMANCE

JUNE 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	JUN 2020 Actual	JUN 2020 % Change	YTD JUN 2020 Actual	YTD JUN 2020 % Change
GUESTS	7,634	-72.9% ▼	82,340	-45.1% ▼
OCCUPANCY RATE	72%	-0.6% ▼	75%	-7.0% ▼
ALOS NIGHTS	7.6	214.8% ▲	4.5	56.4% ▲
REVENUES (M AED)	12.2	21.0% ▲	78.6	-22.1% ▼
ARR (AED)	205	14.4% ▲	221	-19.4% ▼
REVPAR (AED)	149	13.8% ▲	166	-25.1% ▼

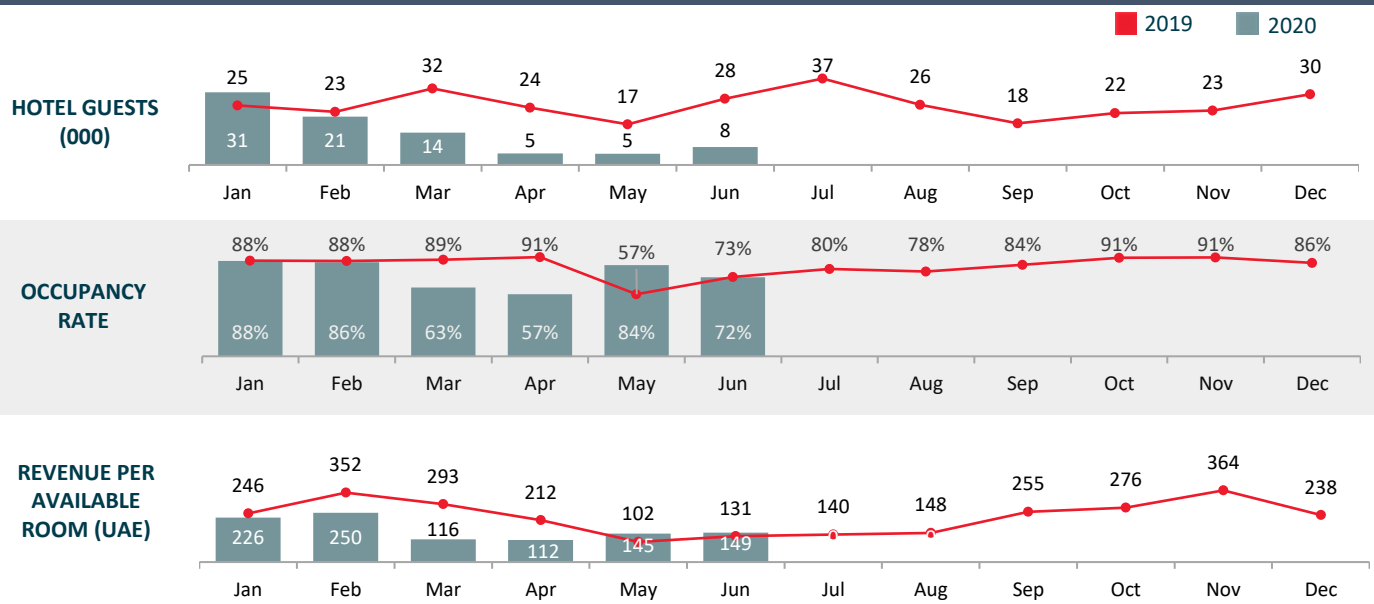
TOP NATIONALITIES (000s) – JUN 2020

		% Change	% Share
UAE	2.66	-72.2%	34.8%
India	0.99	-60.7%	13.0%
Philippines	0.58	-68.2%	7.6%
Pakistan	0.51	-47.2%	6.7%
Egypt	0.43	-69.0%	5.6%
Jordan	0.30	-71.8%	4.0%
Nepal	0.25	121.9%	3.3%
Syria	0.16	-66.9%	2.1%
Bangladesh	0.14	93.2%	1.9%
USA	0.12	-80.5%	1.5%
Yemen	0.10	-60.9%	1.4%

TOP NATIONALITIES (000s) – YTD JUN 2020

		% Change	% Share
UAE	30.8	-37.9%	37.5%
India	6.6	-32.5%	8.0%
Egypt	4.0	-37.8%	4.9%
KSA	3.7	-28.6%	4.4%
China	3.1	-73.4%	3.8%
Philippines	2.9	-54.5%	3.5%
Pakistan	2.6	-34.0%	3.2%
USA	2.4	-46.4%	2.9%
Jordan	2.3	-50.1%	2.7%
UK	2.1	-55.2%	2.6%
Syria	1.2	-46.4%	1.4%

MONTHLY TRENDS



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ABU DHABI ISLAND PERFORMANCE*

JUNE 2020

HOTEL SUPPLY

118 HOTELS

23,331 ROOMS

STAR RATING

5 STAR	4 STAR	1-3 STAR	APTS
36 HOTELS	23 HOTELS	21 HOTELS	38 HOTELS
11,316 ROOMS	4,795 ROOMS	2,562 ROOMS	4,658 ROOMS

OVERALL PERFORMANCE

KEY INDICATORS	JUN 2020 Actual	JUN 2020 % Change	YTD JUN 2020 Actual	YTD JUN 2020 % Change
GUESTS	112,770	-62.0% ▼	1,099,704	-37.1% ▼
OCCUPANCY RATE	65%	-0.4% ▼	69%	-6.5% ▼
ALOS NIGHTS	5.0	111.6% ▲	3.5	33.7% ▲
REVENUES (M AED)	140.2	-43.0% ▼	1,260.2	-36.9% ▼
ARR (AED)	214	-20.4% ▼	263	-22.9% ▼
REVPAR (AED)	139	-20.7% ▼	180	-27.9% ▼

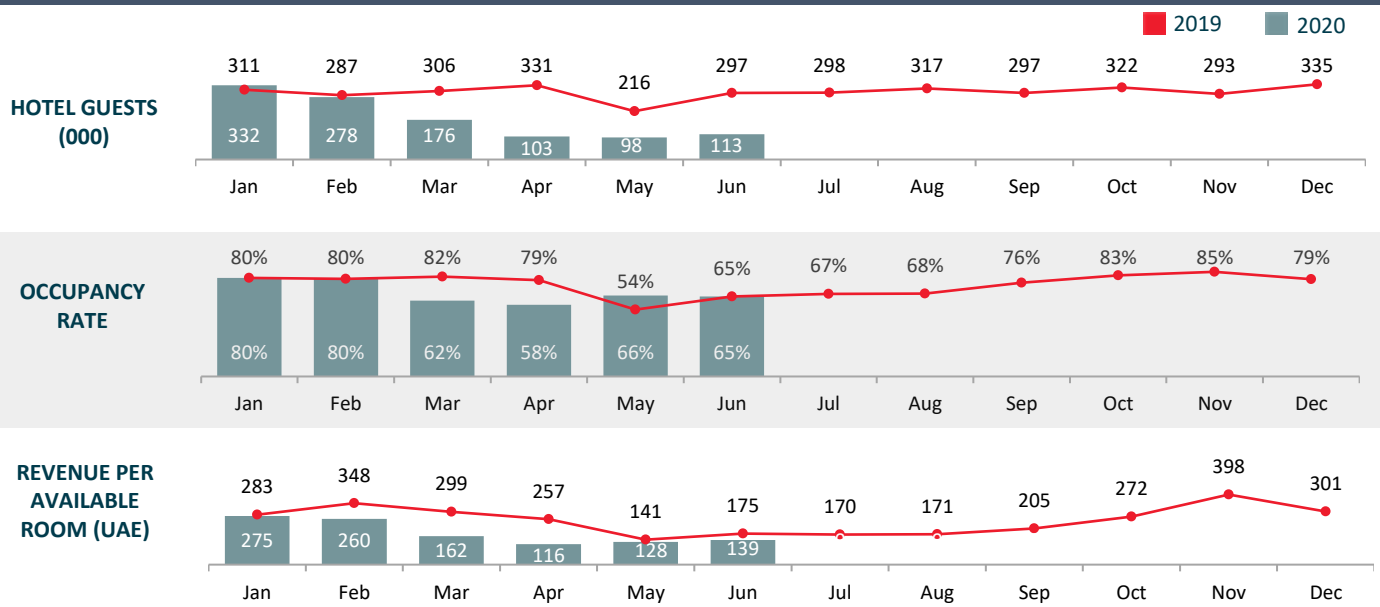
TOP NATIONALITIES (000s) – JUN 2020

		% Change	Share %
UAE	36.1	-61.0%	32.0%
India	17.7	-40.5%	15.7%
Philippines	10.2	-33.8%	9.1%
Egypt	7.0	-46.0%	6.2%
Pakistan	5.7	-30.5%	5.1%
Jordan	3.5	-55.5%	3.1%
USA	2.6	-79.1%	2.3%
UK	2.4	-79.4%	2.1%
Syria	2.3	-50.3%	2.1%
Morocco	1.8	-33.9%	1.6%
Lebanon	1.7	-43.8%	1.5%

TOP NATIONALITIES (000s) – YTD JUN 2020

		% Change	% Share
UAE	281.3	-36.4%	25.6%
India	137.3	-8.2%	12.5%
Egypt	56.8	-18.5%	5.2%
Philippines	53.7	-14.5%	4.9%
USA	45.1	-45.3%	4.1%
UK	44.6	-51.4%	4.1%
China	42.6	-75.2%	3.9%
Pakistan	34.8	-15.5%	3.2%
KSA	28.9	-36.6%	2.6%
Jordan	28.8	-32.4%	2.6%
Germany	21.3	-55.1%	1.9%

MONTHLY TRENDS



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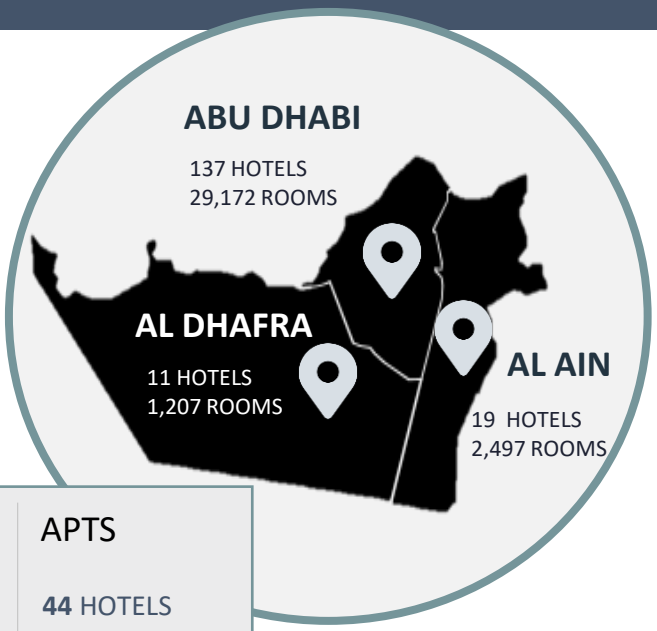
HOTEL SUPPLY
JUNE 2020

HOTEL SUPPLY AS OF JUNE 2020

167 HOTELS

32,876 ROOMS



STAR RATING

5 STAR	4 STAR	1-3 STAR	APTS
54 HOTELS **15,184** ROOMS	**37** HOTELS **7,770** ROOMS	**32** HOTELS **4,473** ROOMS	**44** HOTELS **5,449** ROOMS

Quarantine Hotels: In June, around 13 properties across the Abu Dhabi emirate were used at some point for quarantine purposes. As of July 18, there are around 3 hotels currently being used for quarantine purposes.

Temporary Closed Hotels: Since end of May, around 7 properties have resumed their hotel operations, while 8 hotels continue to remain temporarily closed till date (July 18)

Yas Island Hotels: Stringent measures have been put in place in Yas Island to ensure the safe running of UFC Flight Island during the coronavirus pandemic. Most of the Yas Island hotels are currently accommodating guests from UFC 251 committee and as a precautionary measure towards COVID-19, all hotels in Yas island have stopped accepting any new bookings.

RECENT SUPPLY ADDITIONS AND CLOSURES - 2020

CLOSED: JAN 2020

BIN MAJID TOWER HOTEL APT

LOCATION: AL MARKAZIYAH & AL ZAHIYA

TYPE: DELUXE APT

ROOMS: 224

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GLOSSARY

JUNE 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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