



ABU DHABI HOTEL PERFORMANCE REPORT

Q2 2019

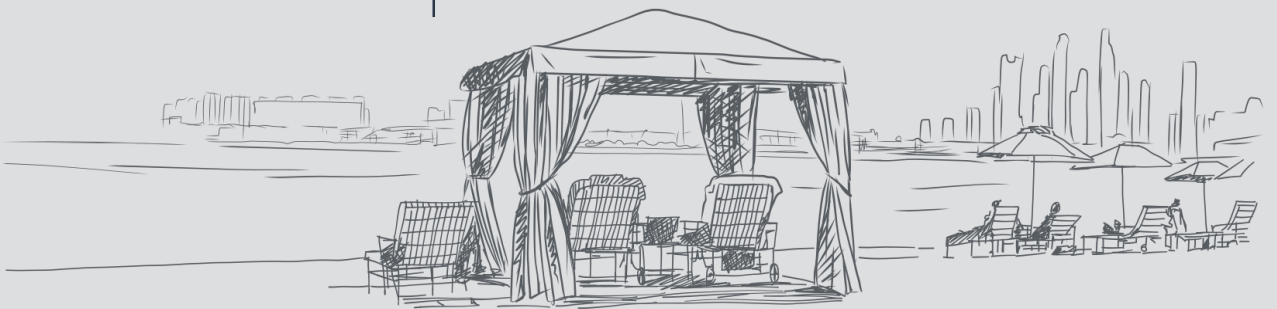
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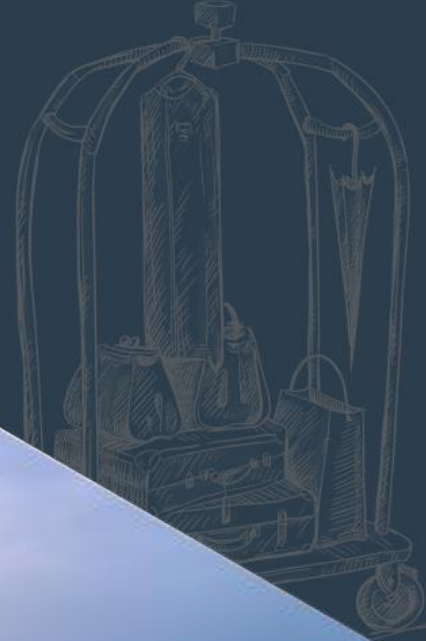


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KEY HIGHLIGHTS



Q2 2019	HOTEL GUESTS	HOTEL OCCUPANCY	HOTEL REVENUES	ALOS (DAYS)
	1.2 M +6.8% <small>(FROM Q2 2018)</small>	65% -0.7% <small>(FROM Q2 2018)</small>	1.2 B +3.7% <small>(FROM Q2 2018)</small>	2.5 -1.8% <small>(FROM Q2 2018)</small>

YTD 2019	2.5 M	72%	2.9 B	2.6
	+3.5% <small>(FROM YTD 2018)</small>	+0.5% <small>(FROM YTD 2018)</small>	+10.6% <small>(FROM YTD 2018)</small>	+0.2% <small>(FROM YTD 2018)</small>

Other Key Indicators (AED)	Q2 2019		YTD 2019	
	Actual	% Change vs Previous Year	Actual	% Change vs Previous Year
Hotel ARR	326	+3.5%	377	+10.2%
Hotel REVPAR	211	+2.7%	270	+10.7%
Room Revenues	626 M	+8.2%	1,597 M	+17.6%
F&B Revenues	445 M	+0.4%	1,032 M	+5.8%
Other Revenues	137 M	-4.3%	303 M	-4.3%

HOTEL SUPPLY

Q2 2019



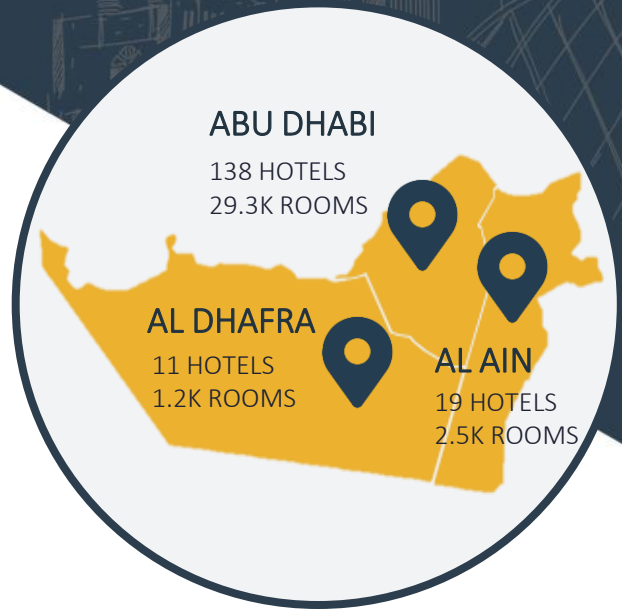
168

HOTELS



33.0K

ROOMS



STAR RATING	5 STAR	4 STAR	1-3 STAR	APTS
	53 HOTELS 14.9K ROOMS	37 HOTELS 7.8K ROOMS	33 HOTELS 4.6K ROOMS	45 HOTELS 5.7K ROOMS

RECENT SUPPLY ADDITIONS & CLOSURES – HY 2019



JUMERIAH AL WATBHA

KHALIFA & OUTSKIRTS
TYPE: 5 STAR
ROOMS: 103
OPEN: FEB 2019



AL SHUROOQ APTS

CORNICHE & LULU
TYPE: STANDARD
ROOMS: 32
CLOSED: APR 2019

HOTEL GUESTS

Q2 2019

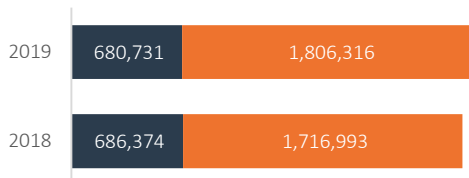
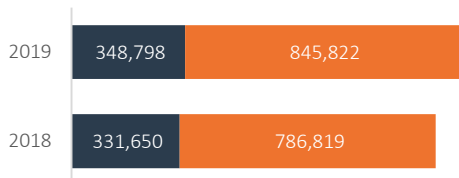
1,194,620

▲ +6.8% FROM Q2 2018

YTD 2019

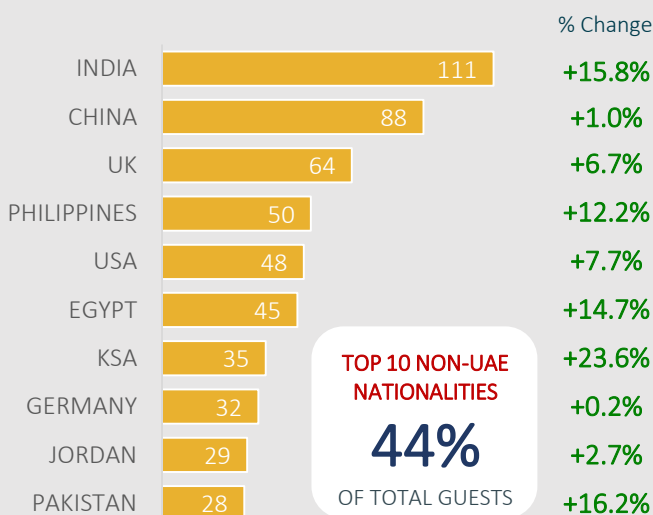
2,487,047

▲ +3.5% FROM YTD 2018



■ UAE ■ Non UAE

TOP NON-UAE NATIONALITIES (000) – Q2 2019

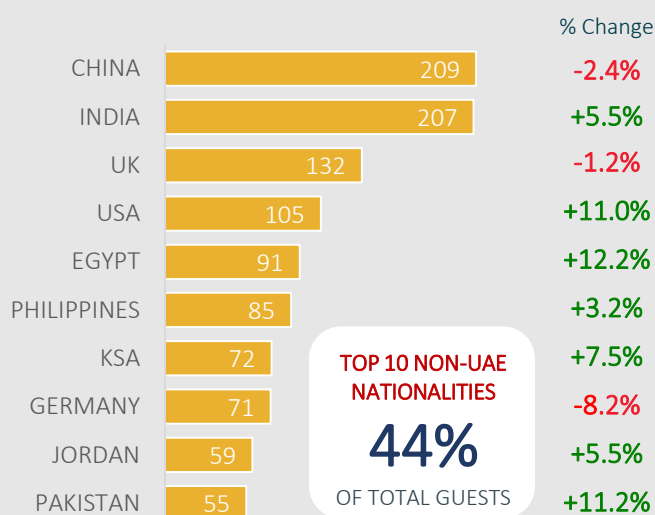


TOP 10 NON-UAE NATIONALITIES

44%

OF TOTAL GUESTS

TOP NON-UAE NATIONALITIES (000) – YTD 2019

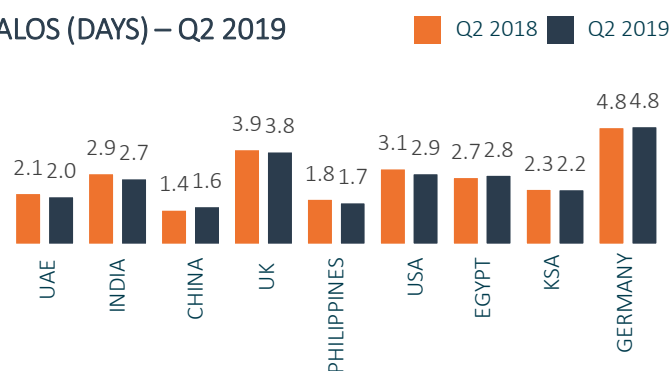


TOP 10 NON-UAE NATIONALITIES

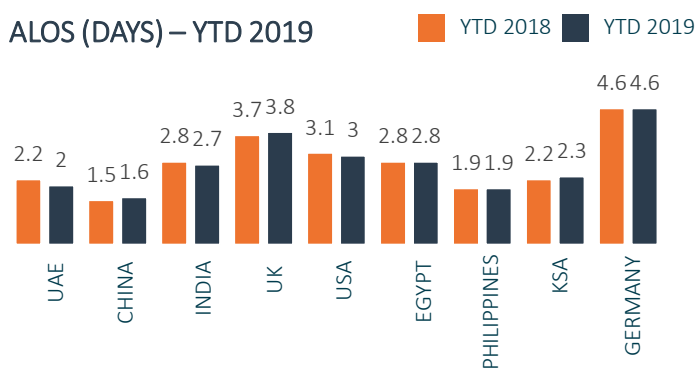
44%

OF TOTAL GUESTS

ALOS (DAYS) – Q2 2019



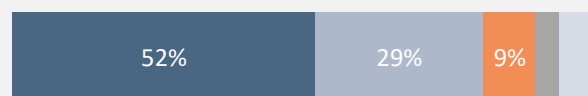
ALOS (DAYS) – YTD 2019



PURPOSE OF VISIT – Q2 2019



PURPOSE OF VISIT – YTD 2019



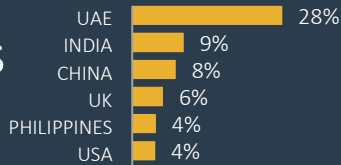
■ Leisure ■ Business ■ MICE ■ VFR ■ Others

PERFORMANCE BY REGION

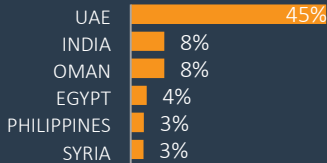
Q2 2019	ABU DHABI		AL AIN		AL DHAFRA	
Key Indicators	Actual	% Change vs Previous Year	Actual	% Change vs Previous Year	Actual	% Change vs Previous Year
GUESTS	1,054,584	+6.4%	105,614	+9.9%	34,422	+10.3%
OCCUPANCY RATE	67%	-1.6%	53%	+5.1%	42%	+5.7%
ALOS DAYS	2.6	-1.6%	1.8	-3.4%	2.1	-4.1%
REVENUES (M AED)	1,097	+3.8%	65	+1.4%	45	+4.9%
ARR (AED)	323	+3.5%	273	-0.7%	588	+12.3%
REVPAR (AED)	215	+1.9%	145	+4.3%	249	+18.7%

TOP NATIONALITIES Q2 2019

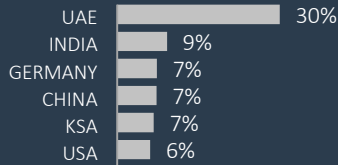
ABU DHABI



AL AIN



AL DHAFRA



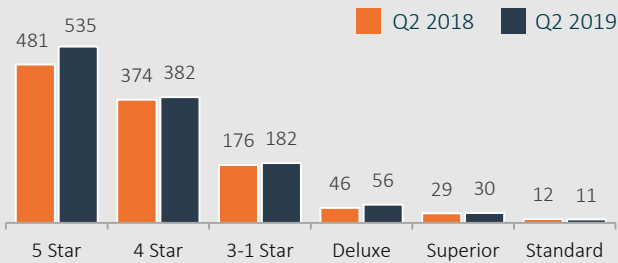
YTD 2019	ABU DHABI		AL AIN		AL DHAFRA	
Key Indicators	Actual	% Change vs Previous Year	Actual	% Change vs Previous Year	Actual	% Change vs Previous Year
GUESTS	2,176,538	+2.5%	238,365	+15.2%	72,144	-0.1%
OCCUPANCY RATE	74%	-0.4%	60%	+8.5%	46%	+4.0%
ALOS DAYS	2.7	+0.7%	1.9	-2.7%	2.2	+2.1%
REVENUES (M AED)	2,656	+10.9%	147	+2.4%	129	+15.6%
ARR (AED)	374	+10.9%	286	-0.7%	729	+12.7%
REVPAR (AED)	276	+10.5%	173	+7.7%	339	+17.3%



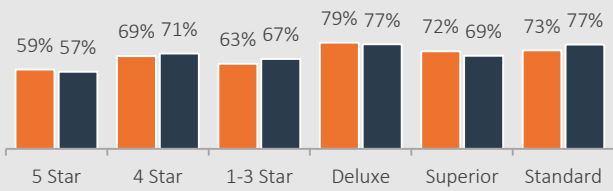
PERFORMANCE BY STAR RATING

Q2 2019

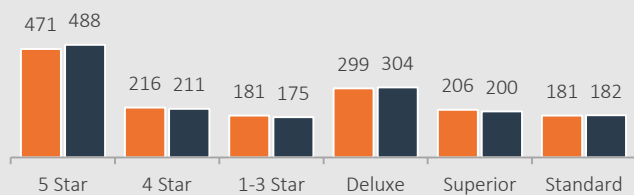
HOTEL GUESTS (000)



OCCUPANCY RATE (%)

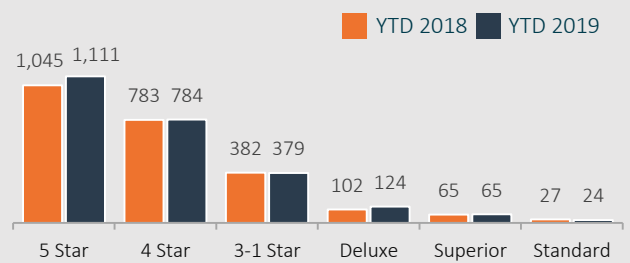


ARR (AED)

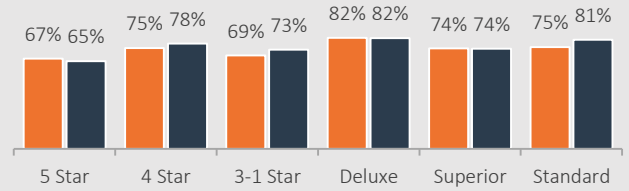


YTD 2019

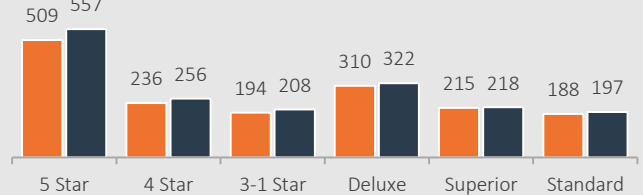
HOTEL GUESTS (000)



OCCUPANCY RATE (%)

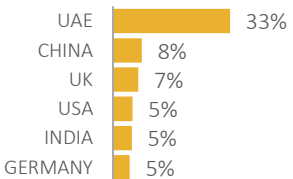


ARR (AED)

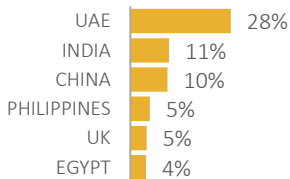


TOP NATIONALITIES – Q2 2019

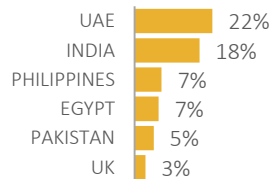
5 STAR



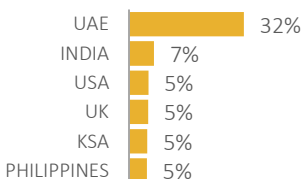
4 STAR



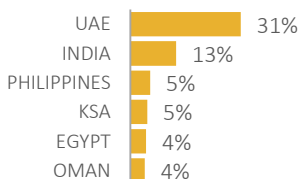
1-3 STAR



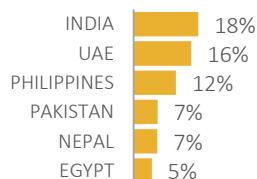
DELUXE



SUPERIOR



STANDARD



YAS ISLAND PERFORMANCE

7 HOTELS
2,259 ROOMS



STAR RATING

5 STAR

1 HOTEL
499 ROOMS

4 STAR

3 HOTELS
1,133 ROOMS

1-3 STAR

2 HOTELS
463 ROOMS

APTS

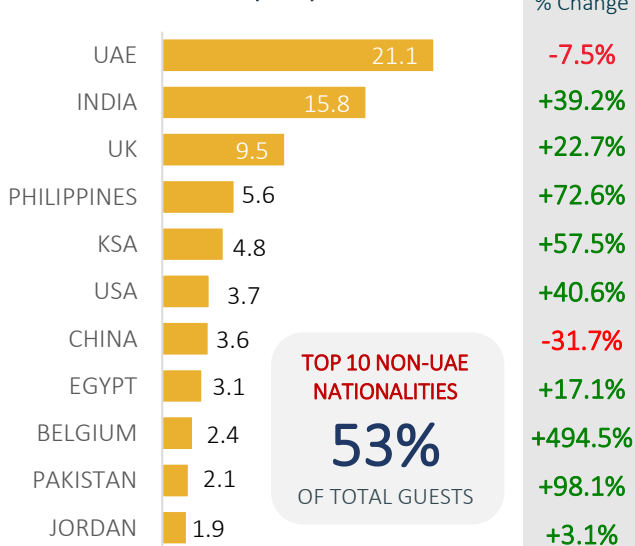
1 HOTELS
164 ROOMS

Q2 2019

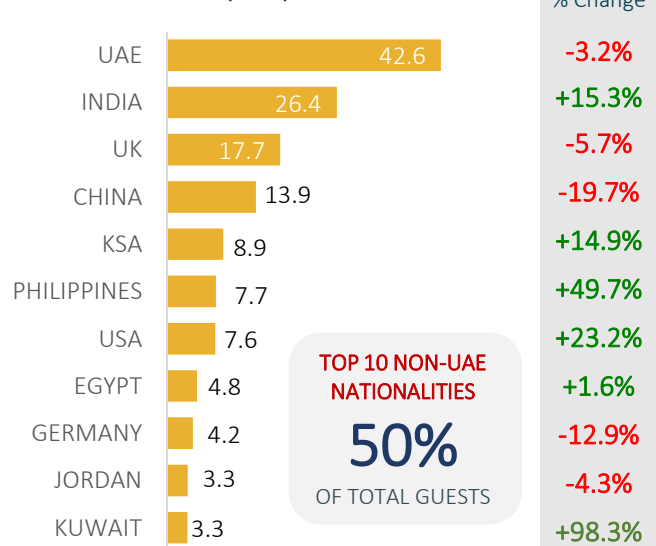
YTD 2019

Key Indicators	Q2 2019		YTD 2019	
	Actual	% Change vs Previous Year	Actual	% Change vs Previous Year
Guests	99,560	+16.5%	197,393	+2.9%
Occupancy	69%	+6.8%	79%	+5.8%
Revenues (AED)	75 M	+1.6%	193 M	+7.8%
ALOS (days)	2.4	-3.8%	2.6	-0.2%
ARR (AED)	306	-1.4%	351	+5.5%
REVPAR (AED)	210	+5.3%	278	+11.6%

TOP NATIONALITIES (000) – Q2 2019



TOP NATIONALITIES (000) – YTD 2019



SAADIYAT & NICHE AREAS PERFORMANCE



6 HOTELS
1,755 ROOMS

STAR RATING

5 STAR

6 HOTELS
1,755 ROOMS

4 STAR

1-3 STAR

APTS

Q2 2019

YTD 2019

Key Indicators

Actual

% Change vs
Previous Year

Actual

% Change vs
Previous Year

Guests

41,114

+83.5%

80,372

+105.0%

Occupancy

64%

+26.1%

65%

+9.4%

Revenues (AED)

167 M

+73.4%

365 M

+71.3%

ALOS (days)

4.5

+6.5%

4.5

-0.6%

ARR (AED)

992

+3.7%

1,076

-0.5%

REVPAR (AED)

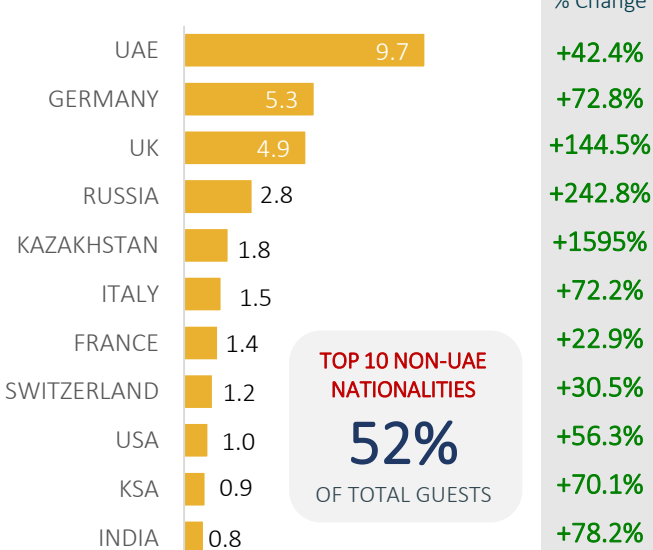
633

+30.9%

697

+8.8%

TOP NATIONALITIES (000) – Q2 2019

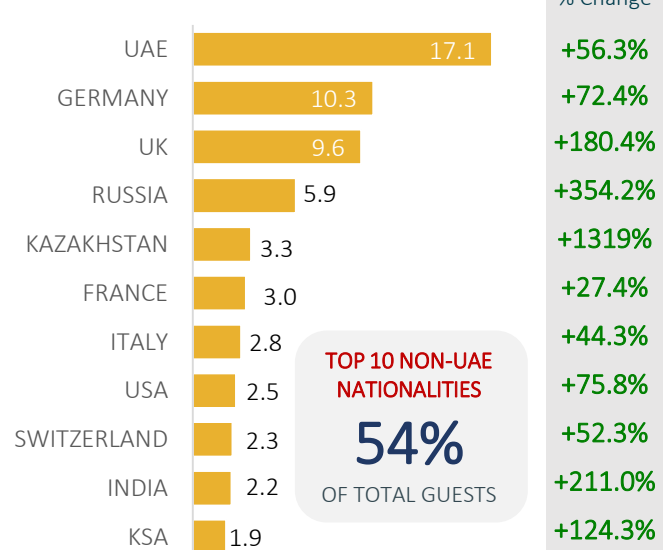


TOP 10 NON-UAE NATIONALITIES

52%

OF TOTAL GUESTS

TOP NATIONALITIES (000) – YTD 2019



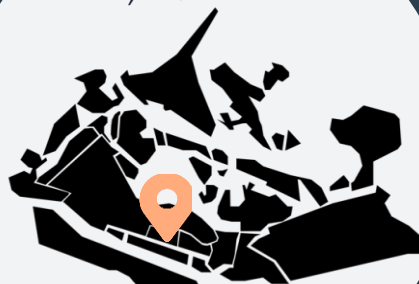
TOP 10 NON-UAE NATIONALITIES

54%

OF TOTAL GUESTS

ADNEC PERFORMANCE

6 HOTELS
1,827 ROOMS



STAR RATING

5 STAR

1 HOTEL
189 ROOMS

4 STAR

2 HOTELS
723 ROOMS

1-3 STAR

2 HOTELS
656 ROOMS

APTS

1 HOTELS
259 ROOMS

Q2 2019

YTD 2019

Key Indicators

Actual

% Change vs
Previous Year

Actual

% Change vs
Previous Year

Guests

69,789

+10.2%

150,079

+15.9%

Occupancy

73%

+11.9%

81%

+11.3%

Revenues (AED)

36 M

+2.5%

101 M

+26.0%

ALOS (days)

2.8

-11.6%

2.9

-6.6%

ARR (AED)

201

-8.6%

274

+10.7%

REVPAR (AED)

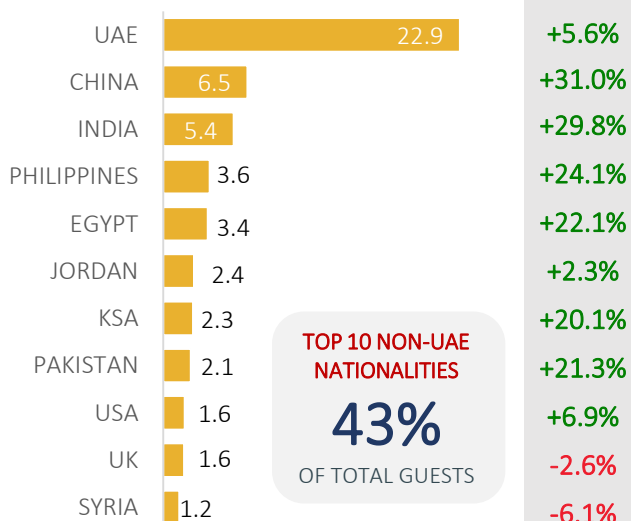
148

+2.3%

221

+23.2%

TOP NATIONALITIES (000) – Q2 2019

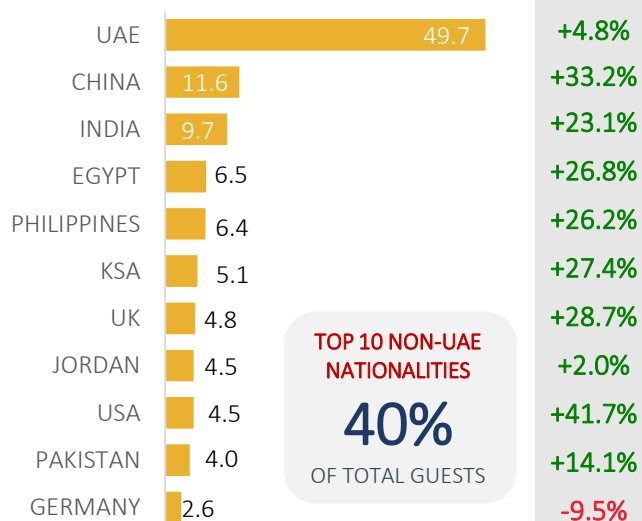


TOP 10 NON-UAE
NATIONALITIES

43%

OF TOTAL GUESTS

TOP NATIONALITIES (000) – YTD 2019



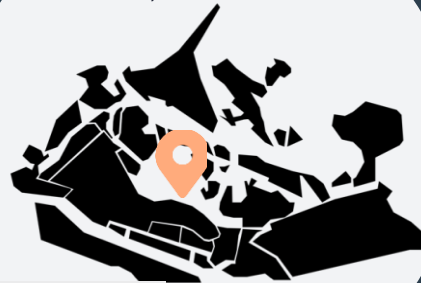
TOP 10 NON-UAE
NATIONALITIES

40%

OF TOTAL GUESTS

ABU DHABI ISLAND* PERFORMANCE

119 HOTELS
23,501 ROOMS



STAR RATING

5 STAR

35 HOTELS
11,057 ROOMS

4 STAR

23 HOTELS
4,871 ROOMS

1-3 STAR

22 HOTELS
2,689 ROOMS

APTS

39 HOTELS
4,884 ROOMS

*Includes Corniche, Marina, Bateen, Al Markaziyah, Al Zahiya, Al Maryah Island, Al Reem Island, Al Maqtaa Creek, Al Gurm Corniche, Zayed Sports City and Khalifa City & Raha Beach

Q2 2019

YTD 2019

Key Indicators

Actual

% Change vs
Previous Year

Actual

% Change vs
Previous Year

Guests

844,121

+2.9%

1,748,694

-0.8%

Occupancy

66%

-4.3%

73%

-1.8%

Revenues (AED)

819 M

-3.9%

1,997 M

+3.9%

ALOS (days)

2.5

-2.2%

2.6

-0.2%

ARR (AED)

289

-2.6%

341

+6.5%

REVPAR (AED)

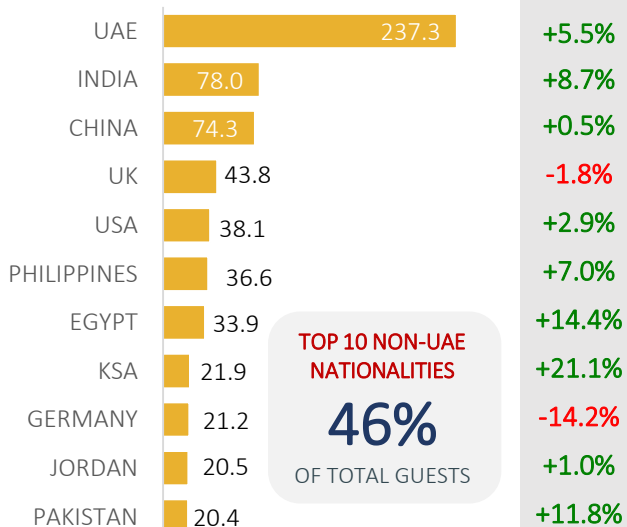
191

-6.8%

250

+4.5%

TOP NATIONALITIES (000) – Q2 2019

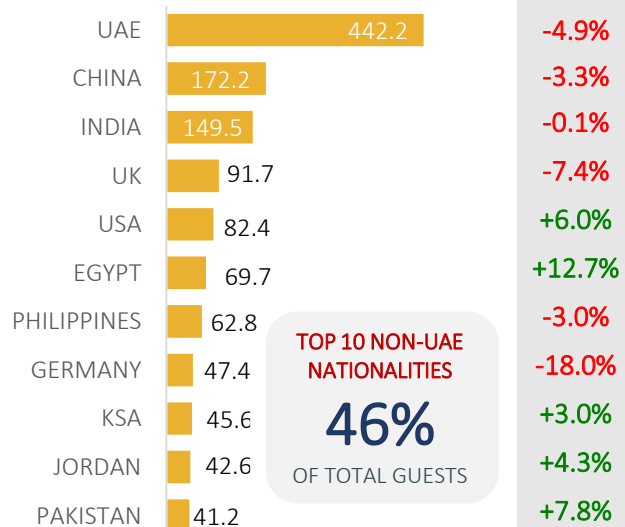


TOP 10 NON-UAE NATIONALITIES

46%

OF TOTAL GUESTS

TOP NATIONALITIES (000) – YTD 2019



TOP 10 NON-UAE NATIONALITIES

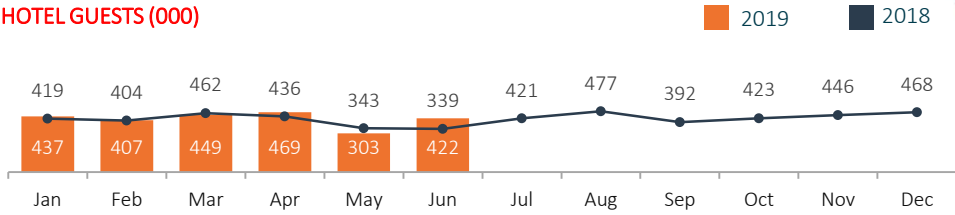
46%

OF TOTAL GUESTS

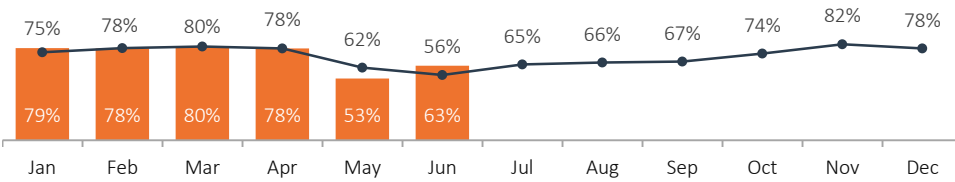
HOTEL KPI

MONTHLY TRENDS

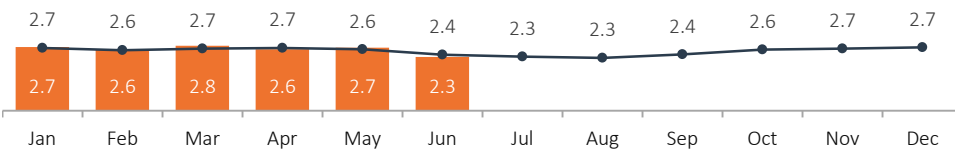
HOTEL GUESTS (000)



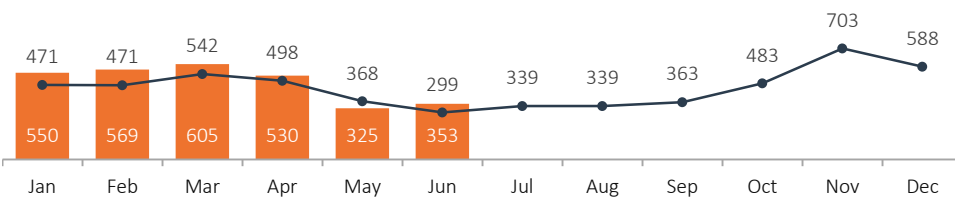
OCCUPANCY RATE



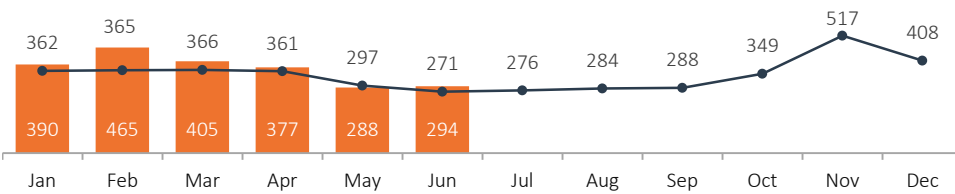
AVERAGE LENGTH OF STAY (ALOS - DAYS)



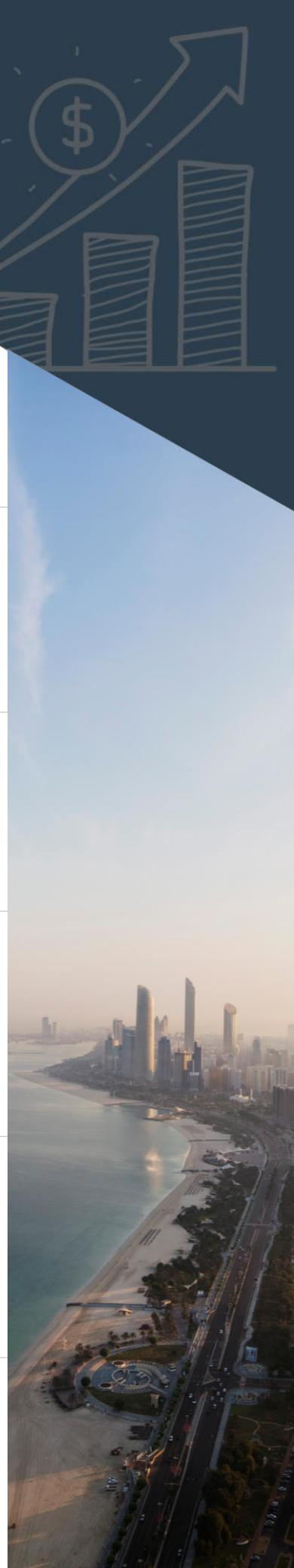
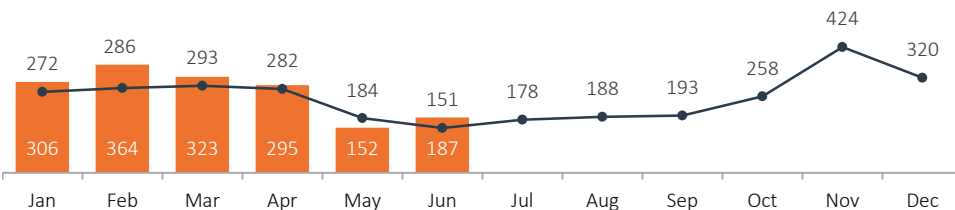
HOTEL TOTAL REVENUES (MILLION UAE)



AVERAGE ROOM RATE (ARR - AED)



REVENUE PER AVAILABLE ROOM (REVPAR - AED)



EVENTS

Q2 2019 EVENTS



FIA WORLD RALLYCROSS



5th -6th April



Abu Dhabi



ABU DHABI INTL BOOK FAIR



24th -30th April



Abu Dhabi



EID AL FITR CELEBRATIONS



1st -8th June



Abu Dhabi

ON-GOING & UPCOMING EVENTS – Q3 2019



SUMMER IN ABU DHABI



24th June -3rd August



Abu Dhabi



EID AL ADHA CELEBRATIONS



11th - 13th August



Abu Dhabi



UFC 242 ABU DHABI



7th September



Abu Dhabi

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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