

ABU DHABI

HOTEL PERFORMANCE REPORT

MARCH 2020

دائرة الثقافة والسياحة
DEPARTMENT OF CULTURE
AND TOURISM



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OVERALL PERFORMANCE

MARCH 2020

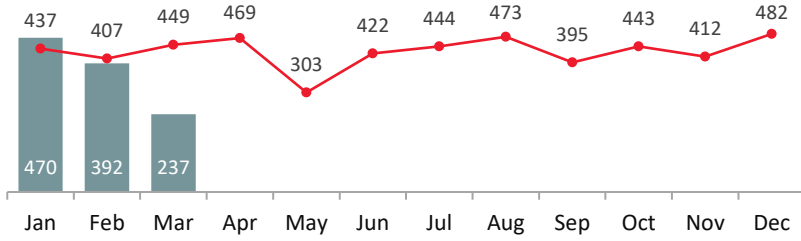


HOTEL GUESTS (000)

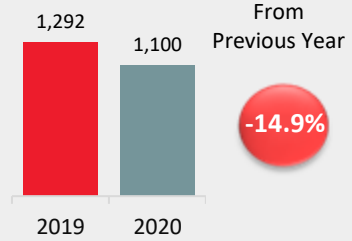
2019 2020

% Change (Mar 2020)

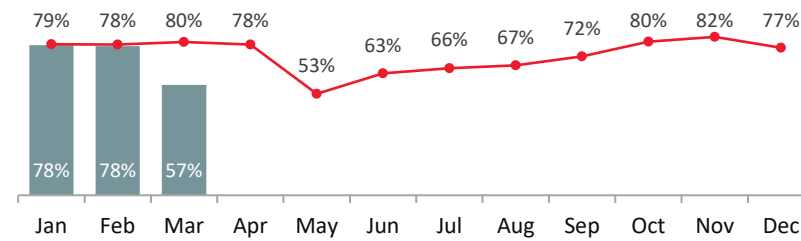
YTD (JAN- MAR)



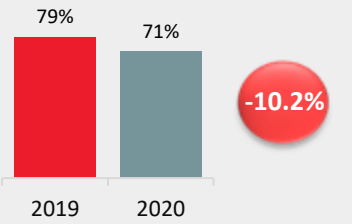
-47.1%



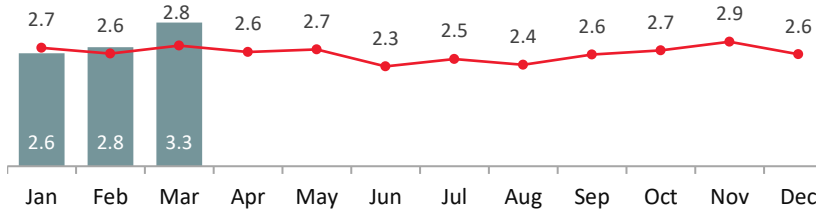
OCCUPANCY RATE



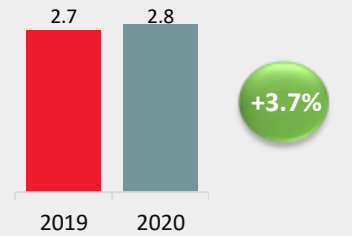
-28.0%



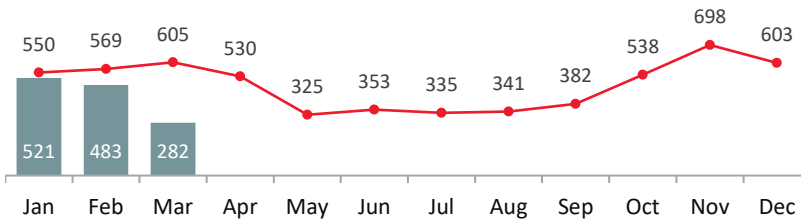
AVERAGE LENGTH OF STAY (ALOS-DAYS)



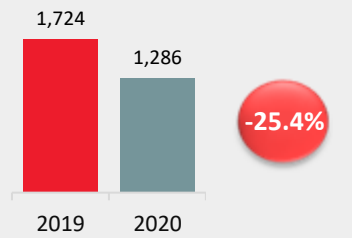
+19.1%



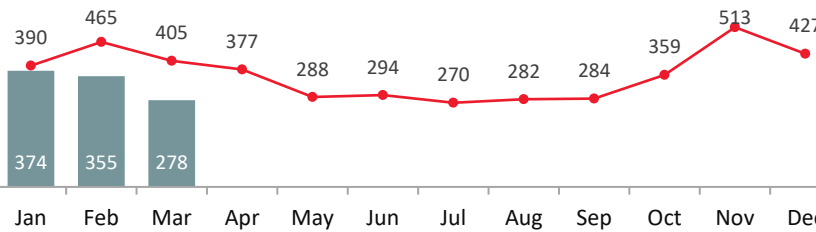
HOTEL TOTAL REVENUE (MILLION UAE)



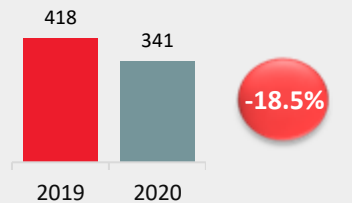
-53.4%



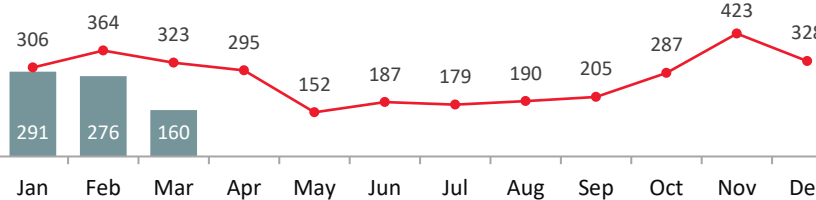
AVERAGE ROOM RATE (UAE)



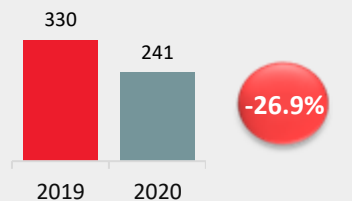
-31.3%



REVENUE PER AVAILABLE ROOM (UAE)



-50.5%



HOTEL GUESTS BY NATIONALITY

MARCH 2020



UAE VS. NON-UAE HOTEL GUESTS

237,492

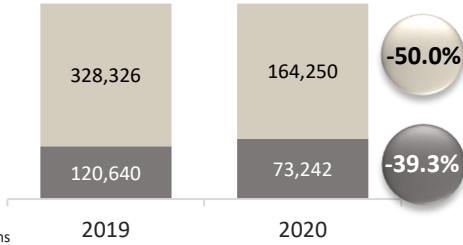
TOTAL

MAR 2020

■ UAE ■ Non UAE

-47.1%

From Previous Year



*UAE refers to UAE citizens

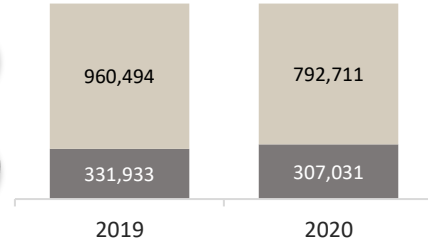
1,099,742

TOTAL

YTD (JAN- MAR) 2020

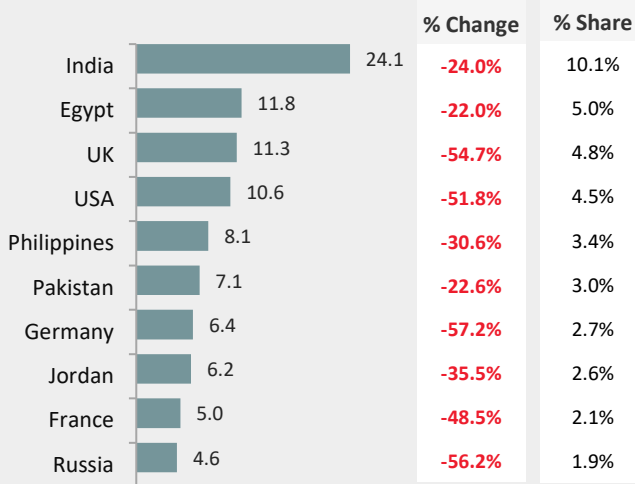
-17.5%

From Previous Year

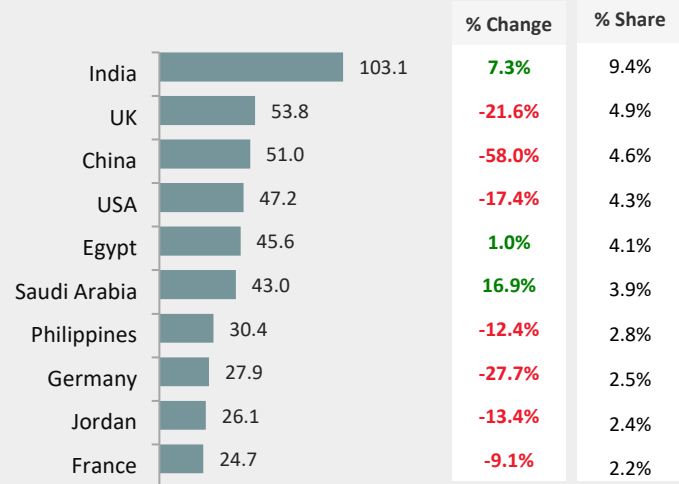


From Previous Year

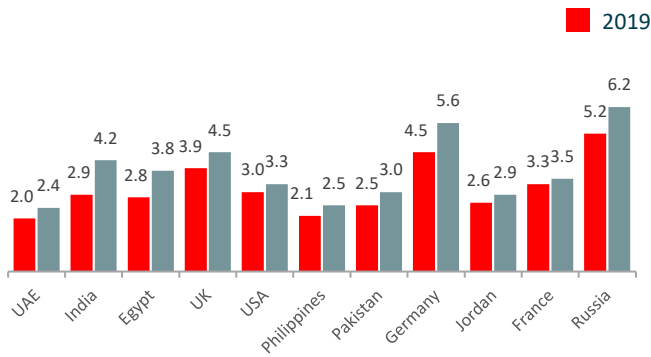
TOP 10 NON-UAE NATIONALITIES (000s) – MAR 2020



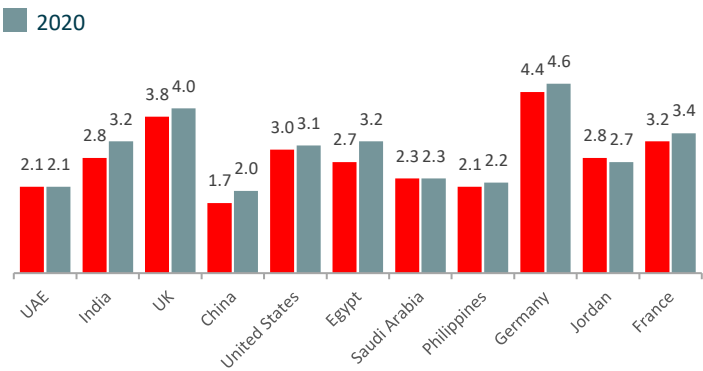
TOP 10 NON-UAE NATIONALITIES (000s) –YTD MAR 2020



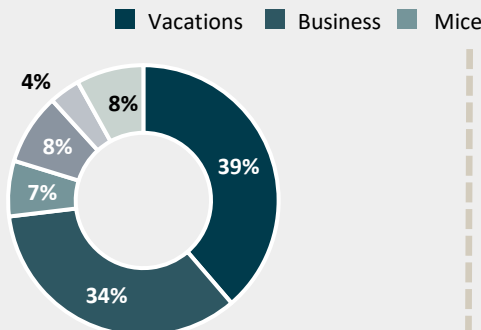
ALOS (NIGHTS) – MAR 2020



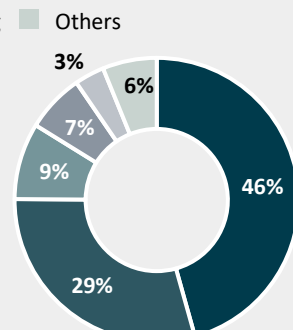
ALOS (NIGHTS) – YTD MAR 2020



PURPOSE OF VISIT- MAR 2020



PURPOSE OF VISIT – YTD MAR 2020



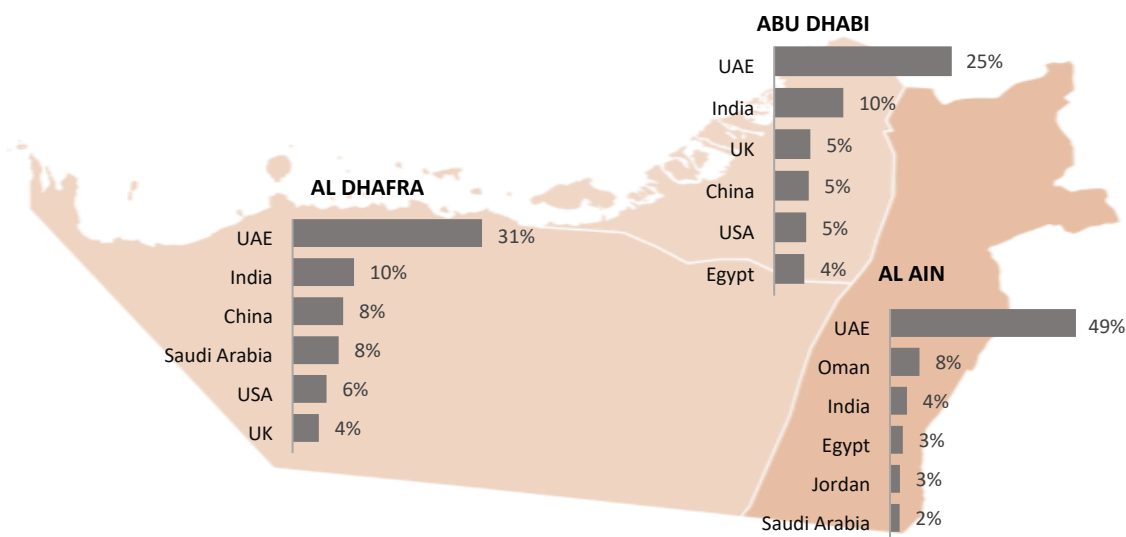
PERFORMANCE BY REGION

MARCH 2020

REGIONAL PERFORMANCE – MAR 2020

KEY INDICATORS	ABU DHABI			AL AIN			AL DHAFRA		
	Actual	% Change		Actual	% Change		Actual	% Change	
GUESTS	206,732	-46.4%	▼	22,386	-55.4%	▼	8,374	-37.5%	▼
OCCUPANCY RATE	58%	-29.3%	▼	43%	-32.1%	▼	65%	37.3%	▲
ALOS DAYS	3.5	17.7%	▲	2.1	9.6%	▲	3.6	72.9%	▲
REVENUES (M AED)	246.7	-55.6%	▼	12.7	-52.6%	▼	22.7	-0.9%	▼
ARR (AED)	270	-33.6%	▼	225	-22.0%	▼	525	-20.8%	▼
REVPAR (AED)	157	-53.0%	▼	97	-47.0%	▼	340	8.8%	▲

TOP NATIONALITIES ACROSS REGIONS – YTD MAR 2020



REGIONAL PERFORMANCE – YTD MAR 2020

KEY INDICATORS	ABU DHABI			AL AIN			AL DHAFRA		
	Actual	% Change		Actual	% Change		Actual	% Change	
GUESTS	959,118	-14.5%	▼	107,498	-19.0%	▼	33,126	-12.2%	▼
OCCUPANCY RATE	72%	-11.0%	▼	59%	-12.8%	▼	63%	24.3%	▲
ALOS DAYS	2.9	4.0%	▲	1.9	-5.6%	▼	2.5	13.8%	▲
REVENUES (M AED)	1,153.1	-26.0%	▼	61.0	-25.5%	▼	72.0	-14.2%	▼
ARR (AED)	336	-19.3%	▼	255	-14.0%	▼	680	-19.1%	▼
REVPAR (AED)	242	-28.2%	▼	151	-25.0%	▼	425	0.6%	▲

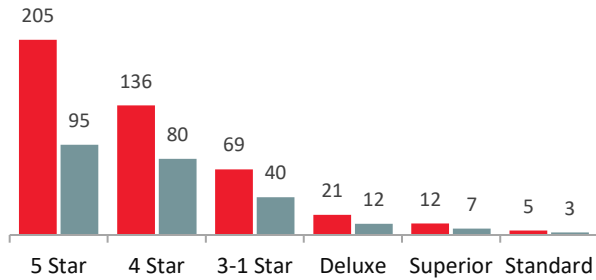
PERFORMANCE BY STAR RATING

MARCH 2020

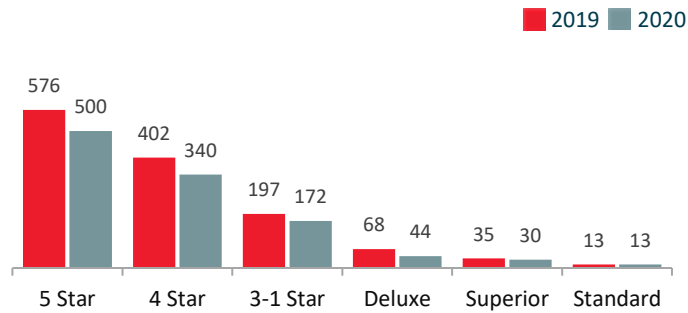


PERFORMANCE ACROSS KEY INDICATORS

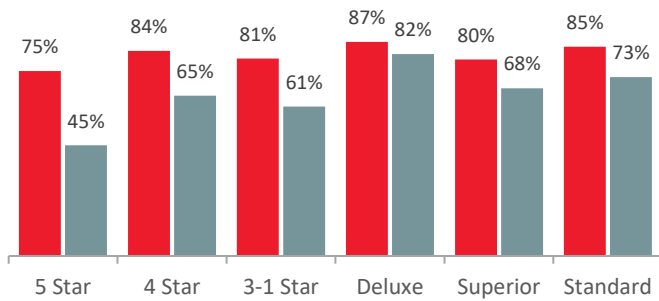
HOTEL GUESTS – MAR 2020



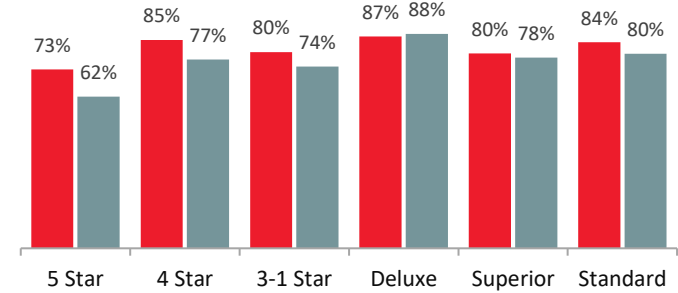
HOTEL GUESTS – YTD MAR 2020



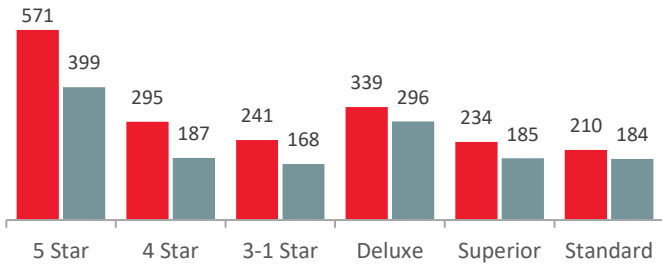
HOTEL OCCUPANCY – MAR 2020



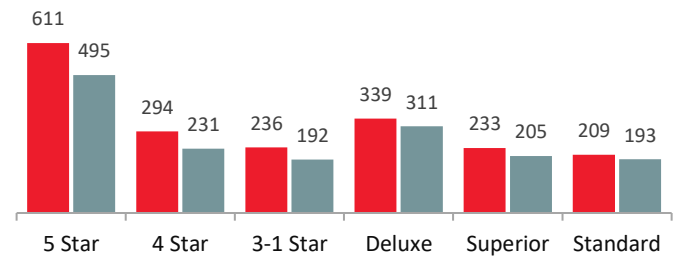
HOTEL OCCUPANCY – YTD MAR 2020



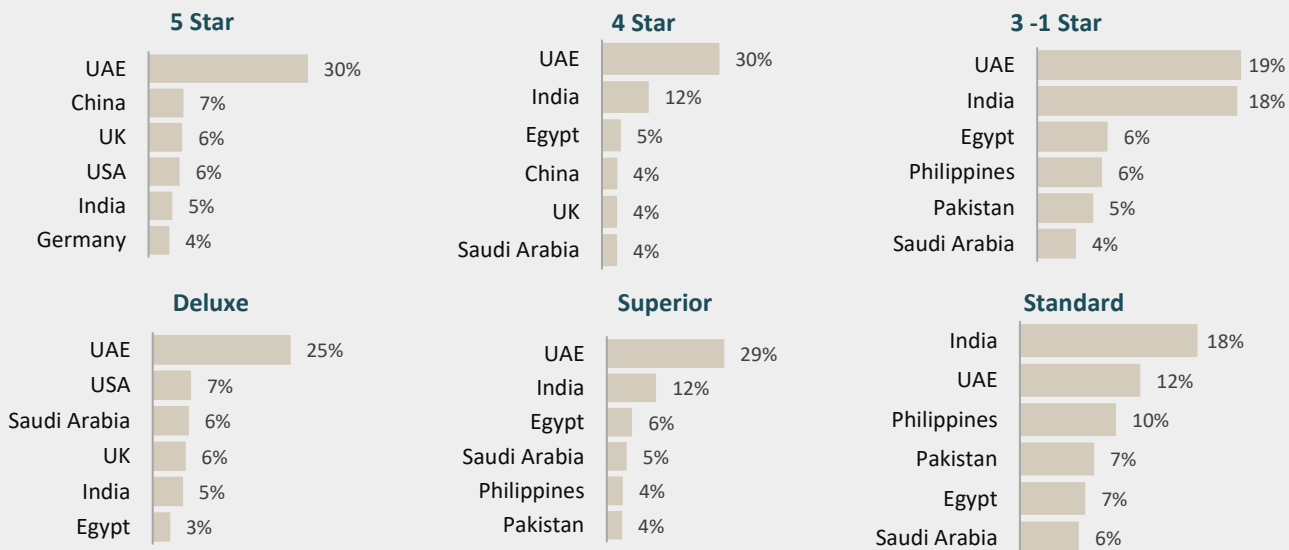
HOTEL ARR (AED) – MAR 2020



HOTEL ARR (AED) – YTD MAR 2020



TOP NATIONALITIES – YTD MAR 2020



YAS ISLAND PERFORMANCE

MARCH 2020

HOTEL SUPPLY



7

HOTELS



2,259

ROOMS

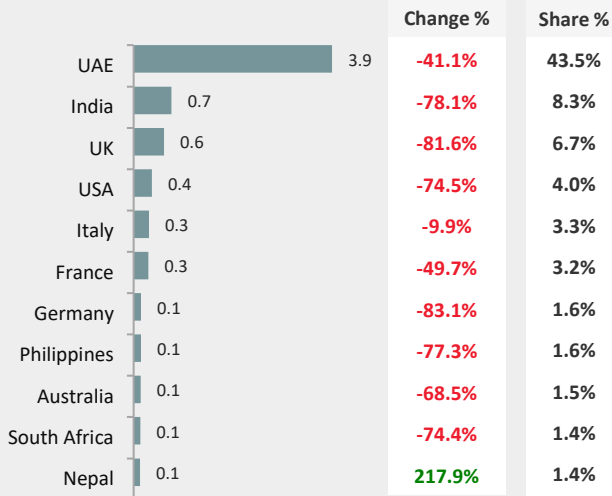


STAR RATING	5 STAR	4 STAR	1-3 STAR	APTS
	1 HOTEL	3 HOTELS	2 HOTELS	1 HOTEL
	499 ROOMS	1,133 ROOMS	463 ROOMS	164 ROOMS

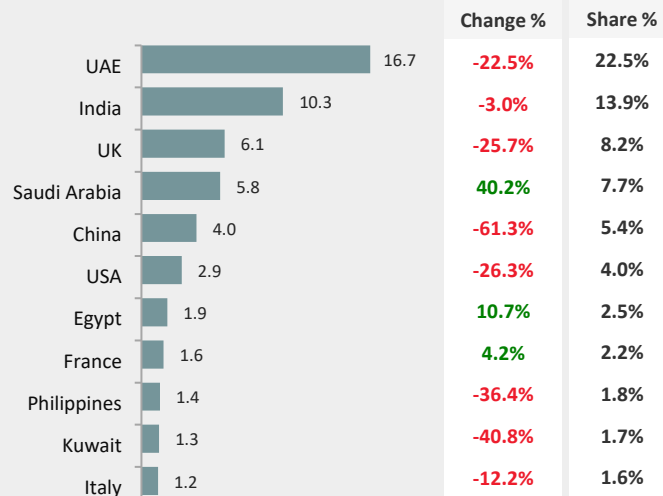
OVERALL PERFORMANCE

KEY INDICATORS	MAR 2020		YTD MAR 2020	
	Actual	% Change	Actual	% Change
GUESTS	9,012	-71.1% ▼	74,238	-24.1% ▼
OCCUPANCY RATE	37%	-58.0% ▼	64%	-28.5% ▼
ALOS DAYS	3.5	18.0% ▲	2.7	-2.8% ▼
REVENUES (M AED)	7.3	-83.6% ▼	66.8	-43.7% ▼
ARR (AED)	175	-55.1% ▼	310	-19.6% ▼
REVPAR (AED)	65	-81.1% ▼	199	-42.5% ▼

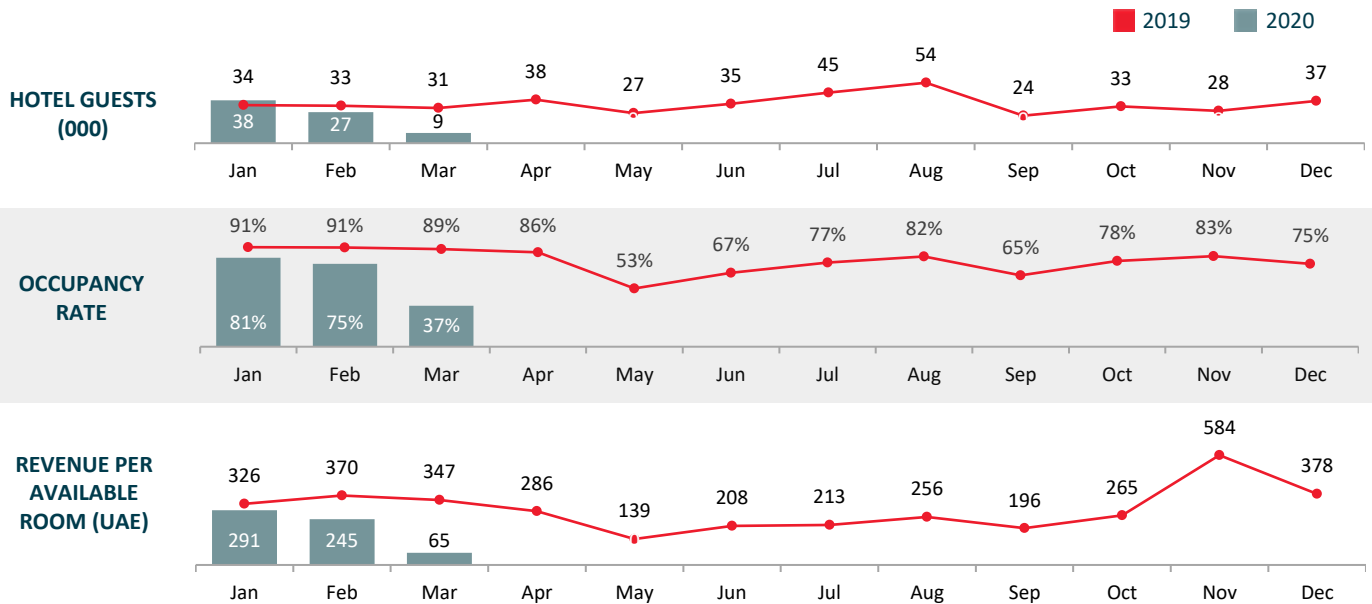
TOP NATIONALITIES (000s) – MAR 2020



TOP NATIONALITIES (000s) – YTD MAR 2020



MONTHLY TRENDS



SAADIYAT & NICHE AREAS PERFORMANCE

MARCH 2020

HOTEL SUPPLY



6

HOTELS



1,755

ROOMS



OVERALL PERFORMANCE

KEY INDICATORS	MAR 2020		YTD MAR 2020	
	Actual	% Change	Actual	% Change
GUESTS	7,635	-51.4%	33,335	-15.1%
OCCUPANCY RATE	34%	-57.0%	52%	-21.5%
ALOS DAYS	4.4	-10.3%	4.4	-0.4%
REVENUES (M AED)	32.2	-59.3%	159.2	-19.4%
ARR (AED)	826	-23.9%	950	-18.0%
REVPAR (AED)	279	-67.2%	490	-35.7%

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

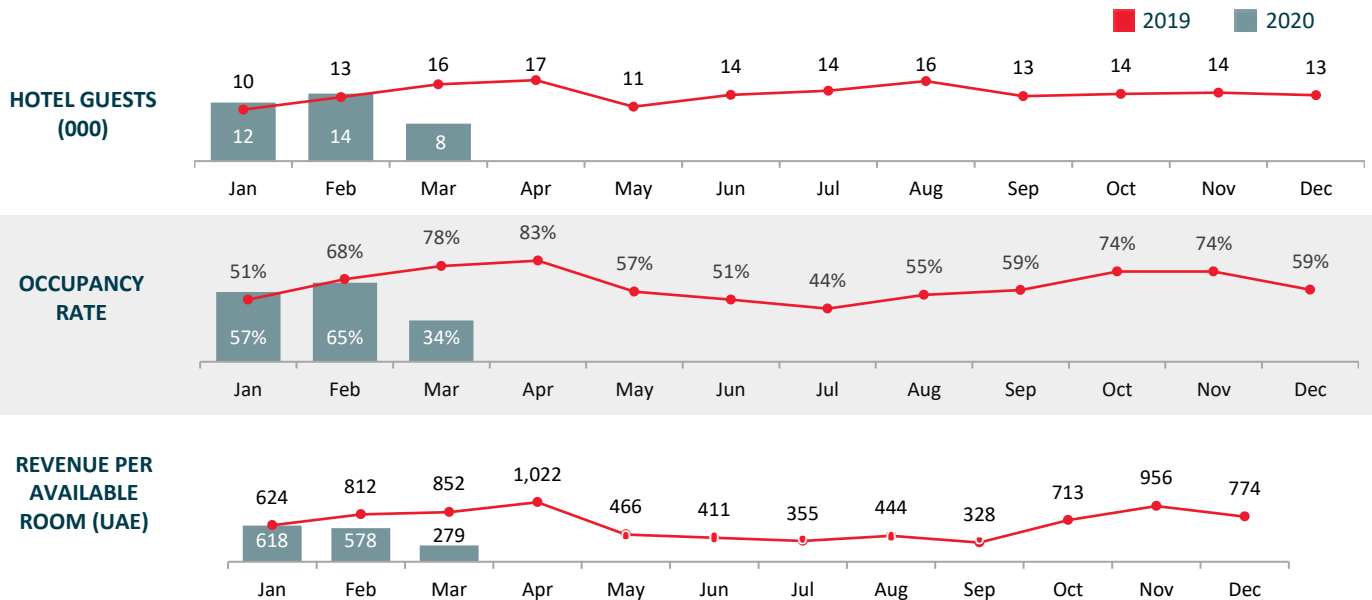
TOP NATIONALITIES (000s) – MAR 2020

Nationality	000s	Change %	Share %
UAE	2.4	-0.9%	31.2%
UK	0.9	-53.4%	11.7%
Russia	0.9	-41.7%	11.3%
Germany	0.8	-66.9%	11.0%
France	0.3	-52.9%	4.0%
Kazakhstan	0.2	-76.2%	3.0%
Ukraine	0.2	-50.0%	2.2%
Switzerland	0.2	-72.1%	2.1%
India	0.1	-47.5%	2.0%
USA	0.1	-76.1%	1.7%
Saudi Arabia	0.1	-71.5%	1.3%

TOP NATIONALITIES (000s) – YTD MAR 2020

Nationality	000s	Change %	Share %
UAE	7.1	-3.8%	21.2%
UK	4.0	-13.1%	12.1%
Russia	3.5	11.0%	10.4%
Germany	3.4	-32.7%	10.1%
France	1.7	0.4%	5.0%
Saudi Arabia	1.1	10.4%	3.4%
USA	1.0	-31.5%	3.0%
Switzerland	1.0	-11.1%	2.9%
Italy	0.9	-24.4%	2.8%
Kazakhstan	0.8	-45.5%	2.5%
India	0.7	-49.5%	2.1%

MONTHLY TRENDS



ADNEC PERFORMANCE

MARCH 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	MAR 2020		YTD MAR 2020	
	Actual	% Change	Actual	% Change
GUESTS	13,705	-57.8%	65,113	-18.9%
OCCUPANCY RATE	63%	-28.7%	79%	-10.5%
ALOS DAYS	4.4	74.5%	3.3	12.4%
REVENUES (M AED)	9.4	-59.4%	44.9	-30.7%
ARR (AED)	183	-44.7%	248	-25.9%
REVPAR (AED)	116	-60.6%	196	-33.6%

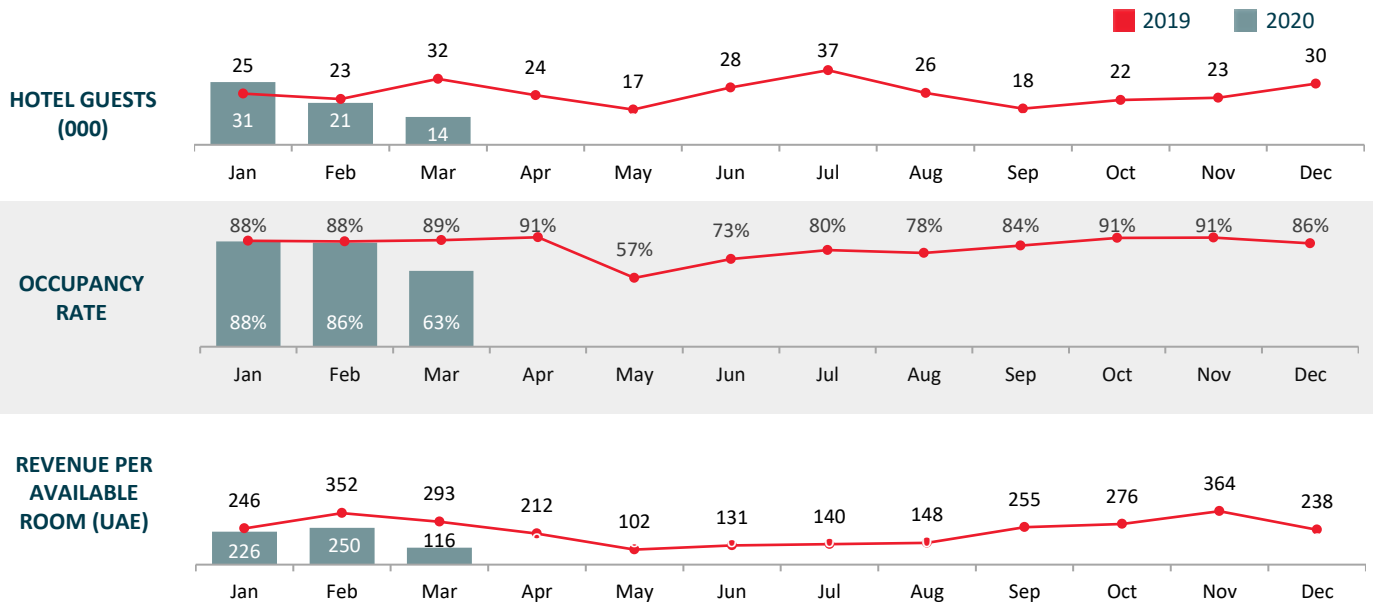
TOP NATIONALITIES (000s) – MAR 2020

Nationality	000s	% Change	Share %
UAE	6.3	-39.9%	45.7%
Egypt	0.8	-38.4%	6.1%
India	0.8	-40.2%	5.7%
Pakistan	0.5	-11.6%	3.5%
USA	0.5	-71.3%	3.3%
Philippines	0.4	-44.2%	3.2%
Jordan	0.4	-43.8%	3.2%
UK	0.3	-78.3%	2.5%
Syria	0.2	-30.2%	1.7%
Morocco	0.2	-2.2%	1.3%
Germany	0.2	-79.3%	1.2%

TOP NATIONALITIES (000s) – YTD MAR 2020

Nationality	000s	% Change	Share %
UAE	24.9	-7.0%	38.2%
India	4.2	-2.6%	6.4%
Saudi Arabia	3.6	27.9%	5.5%
Egypt	3.0	-1.2%	4.7%
China	3.0	-41.0%	4.7%
USA	2.1	-25.9%	3.3%
UK	1.9	-40.8%	2.9%
Jordan	1.7	-21.0%	2.6%
Philippines	1.6	-44.3%	2.4%
Pakistan	1.5	-15.8%	2.4%
Germany	1.0	-43.8%	1.5%

MONTHLY TRENDS



ABU DHABI ISLAND PERFORMANCE*

MARCH 2020

HOTEL SUPPLY



118
HOTELS



23,265
ROOMS



STAR RATING	5 STAR	4 STAR	1-3 STAR	APTS
	36 HOTELS	22 HOTELS	22 HOTELS	38 HOTELS
	11,287 ROOMS	4,637 ROOMS	2,689 ROOMS	4,652 ROOMS

OVERALL PERFORMANCE

KEY INDICATORS	MAR 2020		YTD MAR 2020	
	Actual	% Change	Actual	% Change
GUESTS	175,087	-42.8% ▼	785,139	-13.2% ▼
OCCUPANCY RATE	62%	-24.2% ▼	74%	-8.4% ▼
ALOS DAYS	3.3	16.4% ▲	2.9	4.3% ▲
REVENUES (M AED)	197.2	-51.7% ▼	879.1	-25.3% ▼
ARR (AED)	261	-29.0% ▼	313	-18.3% ▼
REVPAR (AED)	161	-46.2% ▼	231	-25.2% ▼

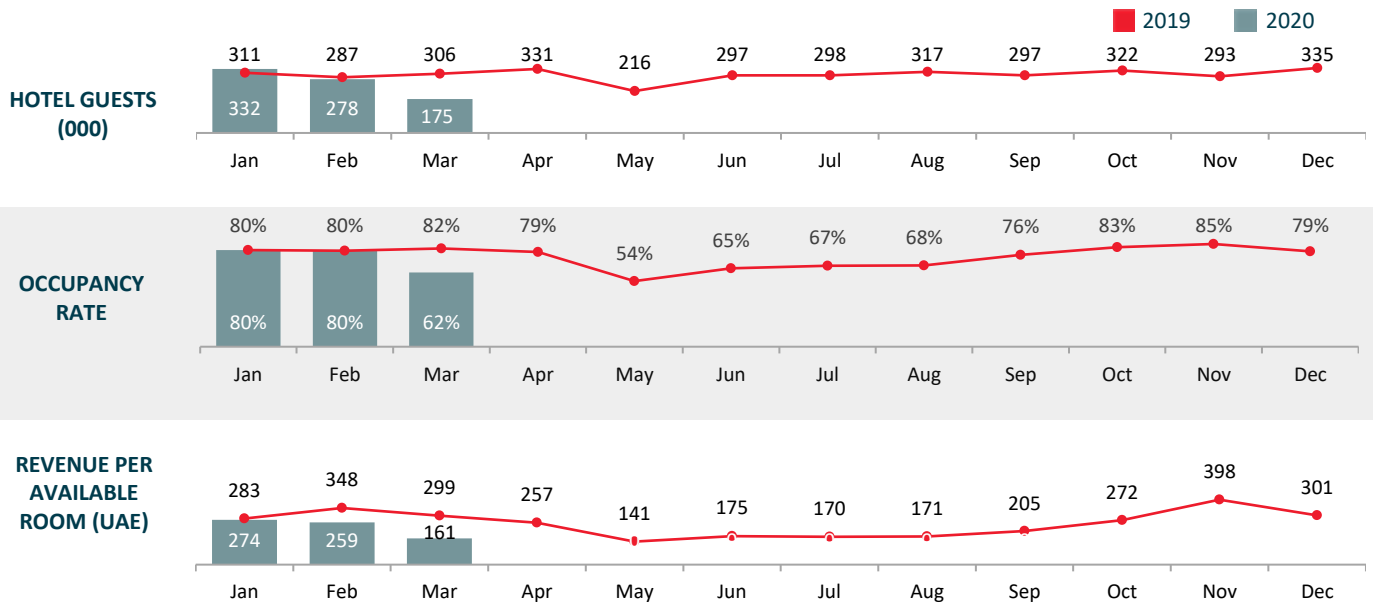
TOP NATIONALITIES (000s) – MAR 2020

Nationality	Count (000s)	% Change	% Share
UAE	46.6	-36.0%	26.6%
India	20.2	-13.1%	11.5%
Egypt	9.7	-15.4%	5.5%
USA	8.9	-46.9%	5.1%
UK	8.3	-49.8%	4.7%
Philippines	6.6	-25.0%	3.8%
Pakistan	5.7	-16.6%	3.3%
Jordan	4.8	-31.2%	2.7%
Germany	4.6	-50.2%	2.7%
Russia	3.5	-55.8%	2.0%
France	3.4	-47.1%	1.9%

TOP NATIONALITIES (000s) – YTD MAR 2020

Nationality	Count (000s)	% Change	% Share
UAE	195.0	-4.8%	24.8%
India	79.8	11.7%	10.2%
China	40.2	-58.9%	5.1%
UK	37.9	-20.9%	4.8%
USA	37.9	-14.6%	4.8%
Egypt	36.2	1.2%	4.6%
Saudi Arabia	27.4	15.2%	3.5%
Philippines	24.5	-6.4%	3.1%
Germany	20.5	-21.8%	2.6%
Jordan	19.9	-10.1%	2.5%
Pakistan	18.8	-9.6%	2.4%

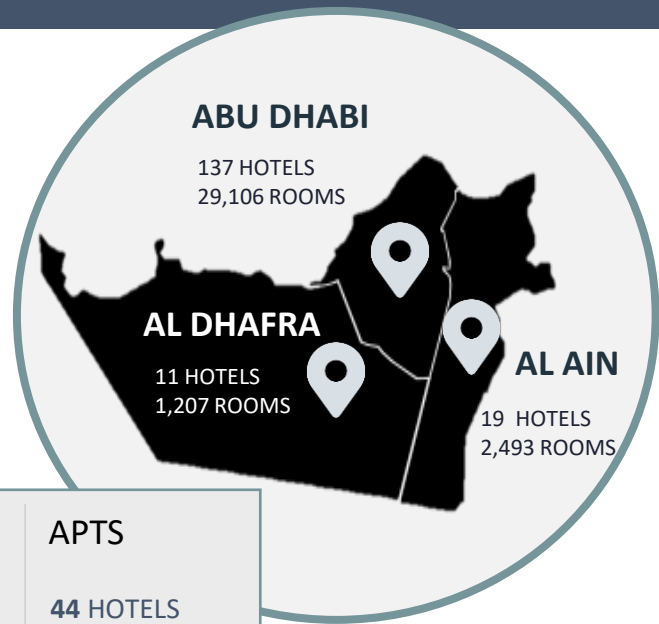
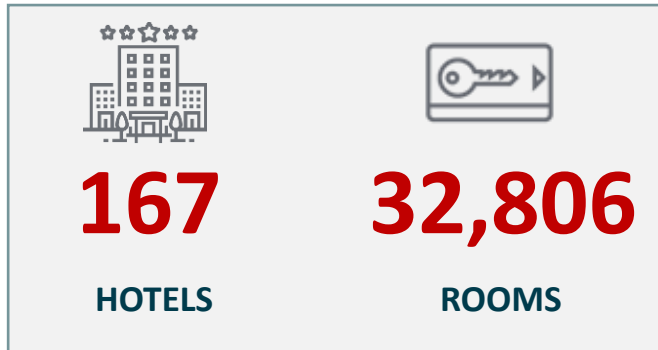
MONTHLY TRENDS



HOTEL SUPPLY

MARCH 2020

HOTEL SUPPLY AS OF MARCH 2020



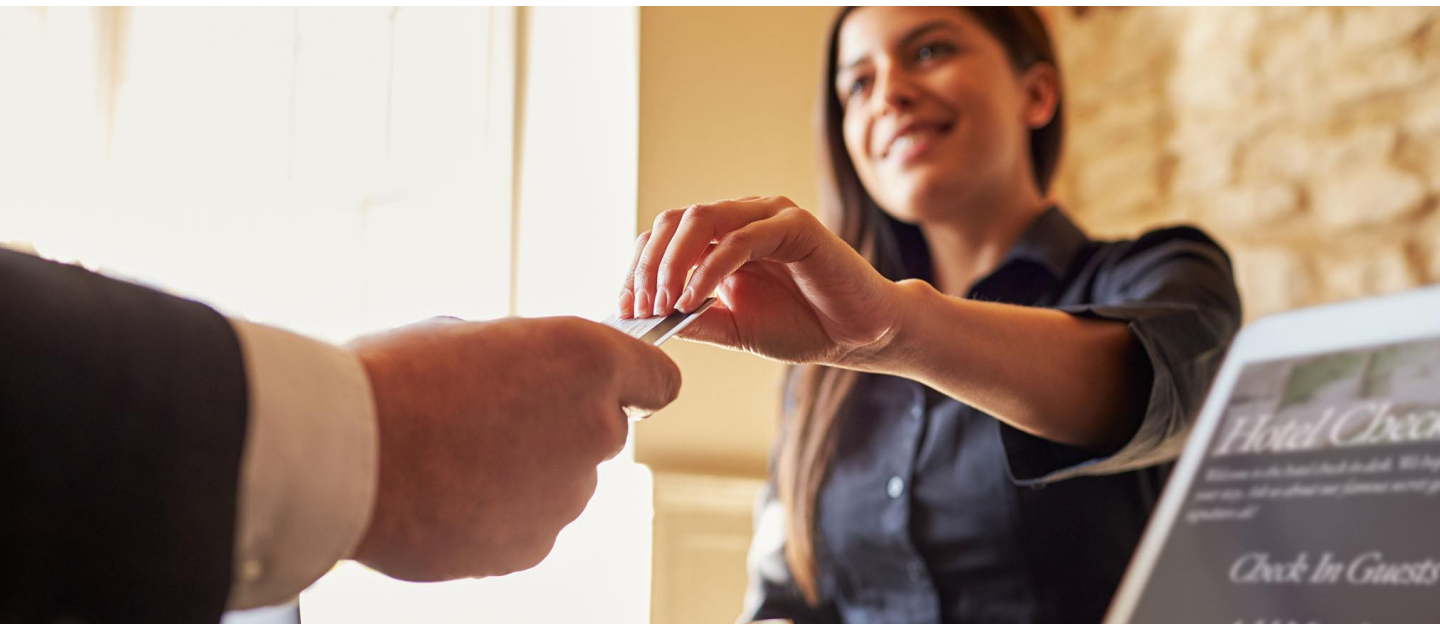
STAR RATING	5 STAR	4 STAR	1-3 STAR	APTS
	54 HOTELS 15,154 ROOMS	36 HOTELS 7,604 ROOMS	33 HOTELS 4,600 ROOMS	44 HOTELS 5,448 ROOMS

RECENT SUPPLY ADDITIONS AND CLOSURES - 2020



CLOSED: JAN 2020

BIN MAJID TOWER HOTEL APT
LOCATION: AL MARKAZIYAH & AL ZAHIYA
TYPE: DELUXE APT
ROOMS: 224





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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- DCT Abu Dhabi shall not be held accountable to the requestor or any other parties regarding alterations made to the data or information contained in this report as a result of the updating process, the conducted audit, the emergence of new data obtained from partners' overseas sources, or in any other case.