

ABU DHABI

HOTEL PERFORMANCE REPORT

FEBRUARY 2020

دائرة الثقافة والسياحة
DEPARTMENT OF CULTURE
AND TOURISM



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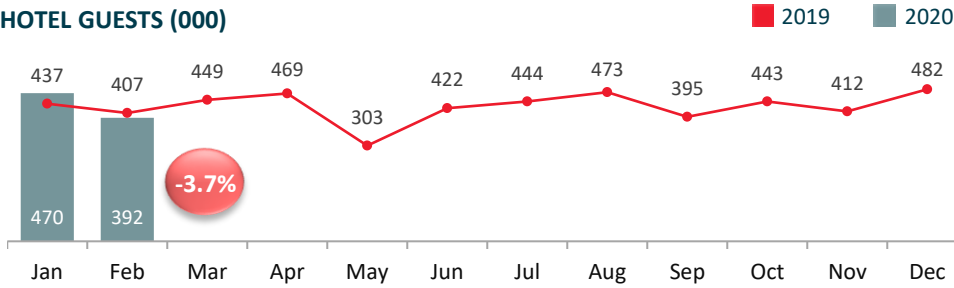
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OVERALL PERFORMANCE

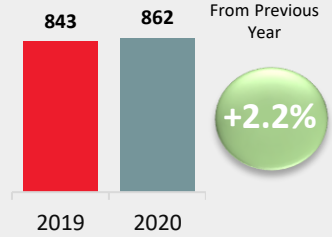
FEBRUARY 2020



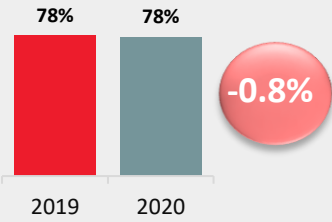
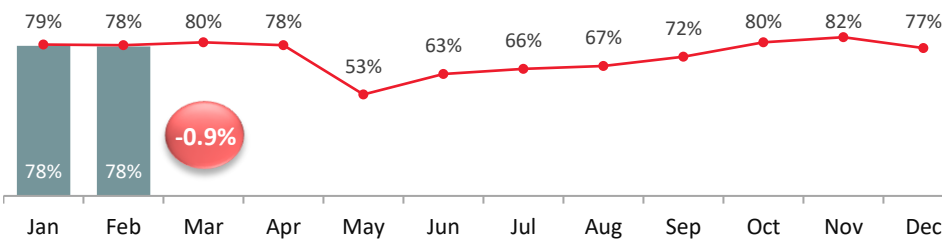
HOTEL GUESTS (000)



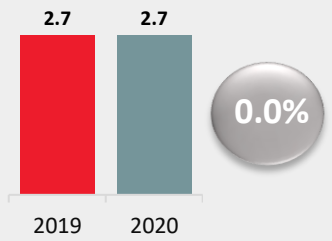
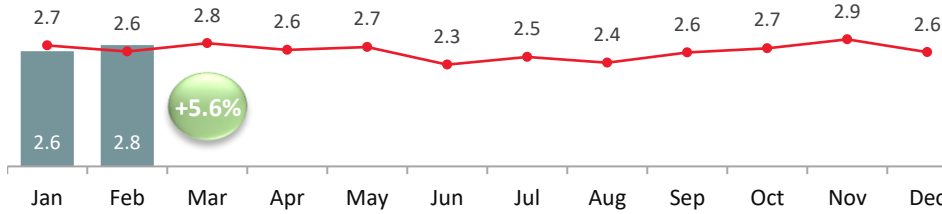
YTD (JAN-FEB)



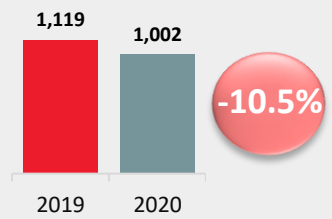
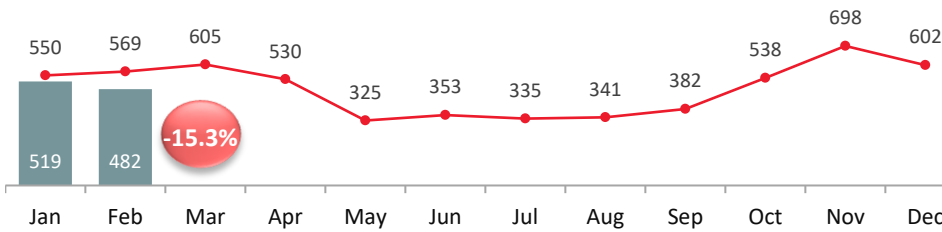
OCCUPANCY RATE



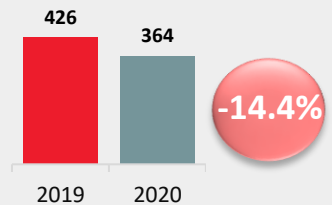
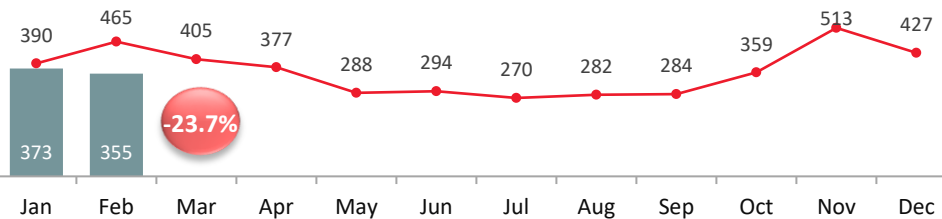
AVERAGE LENGTH OF STAY (ALOS-DAYS)



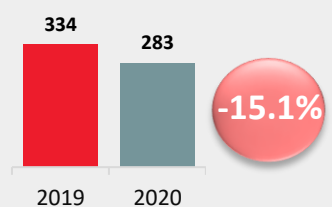
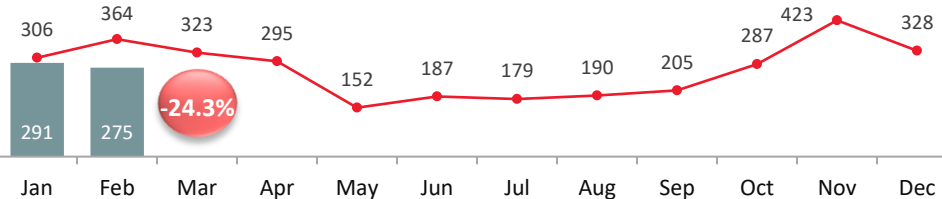
HOTEL TOTAL REVENUE (MILLION UAE)



AVERAGE ROOM RATE (UAE)



REVENUE PER AVAILABLE ROOM (UAE)



HOTEL GUESTS BY NATIONALITY

FEBRAURY 2020



UAE VS. NON-UAE HOTEL GUESTS

391,942

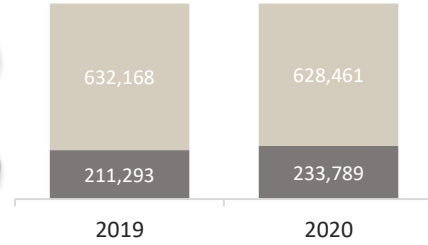
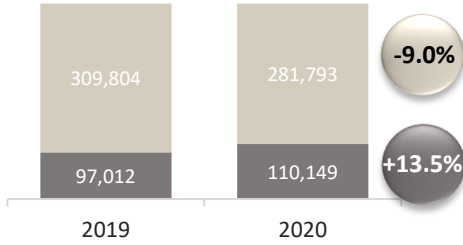
862,250

TOTAL

FEBRUARY

YTD (JAN- FEB)

TOTAL



*UAE refers to UAE citizens

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

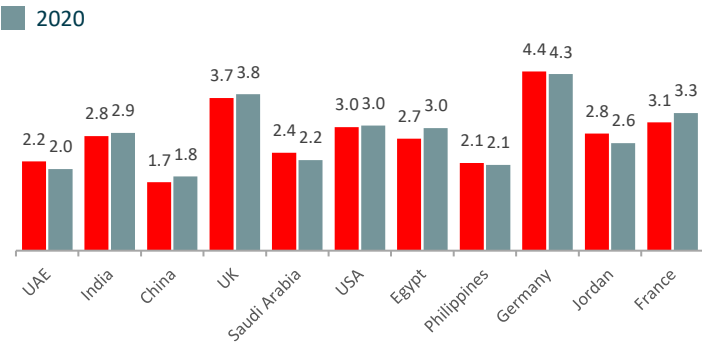
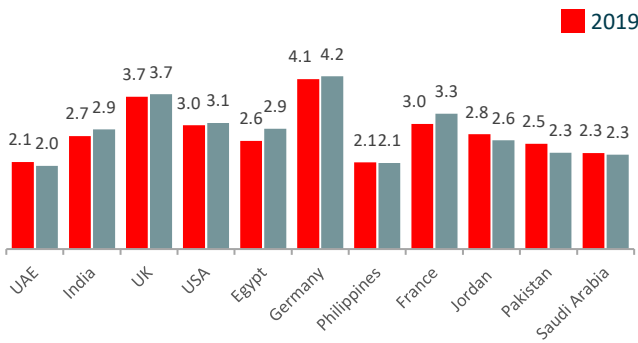
TOP 10 NON-UAE NATIONALITIES (000s) –YTD FEB 2020

Nationality	Value (000s)	% Change	% Share
India	38.2	21.4%	9.8%
UK	22.5	0.4%	5.7%
USA	17.7	-3.8%	4.5%
Egypt	17.7	13.7%	4.5%
Germany	12.0	-9.9%	3.1%
Philippines	11.6	-3.4%	3.0%
France	11.3	10.6%	2.9%
Jordan	9.2	2.2%	2.3%
Pakistan	8.4	-1.1%	2.1%
Saudi Arabia	8.3	-16.4%	2.1%

Nationality	Value (000s)	% Change	% Share
India	79.1	22.6%	9.2%
China	47.7	-45.8%	5.5%
UK	42.5	-2.8%	4.9%
Saudi Arabia	40.4	54.0%	4.7%
USA	36.6	4.1%	4.2%
Egypt	33.8	12.7%	3.9%
Philippines	22.3	-3.2%	2.6%
Germany	21.5	-9.1%	2.5%
Jordan	19.9	-3.2%	2.3%
France	19.8	12.6%	2.3%

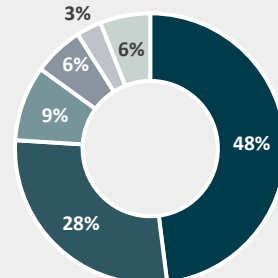
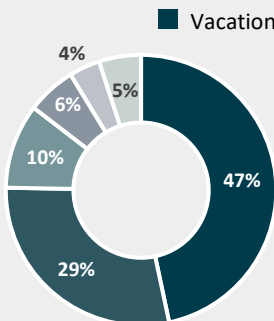
ALOS (NIGHTS)– FEB 2020

ALOS (NIGHTS)– YTD FEB 2020



PURPOSE OF VISIT- FEB 2020

PURPOSE OF VISIT – YTD FEB 2020



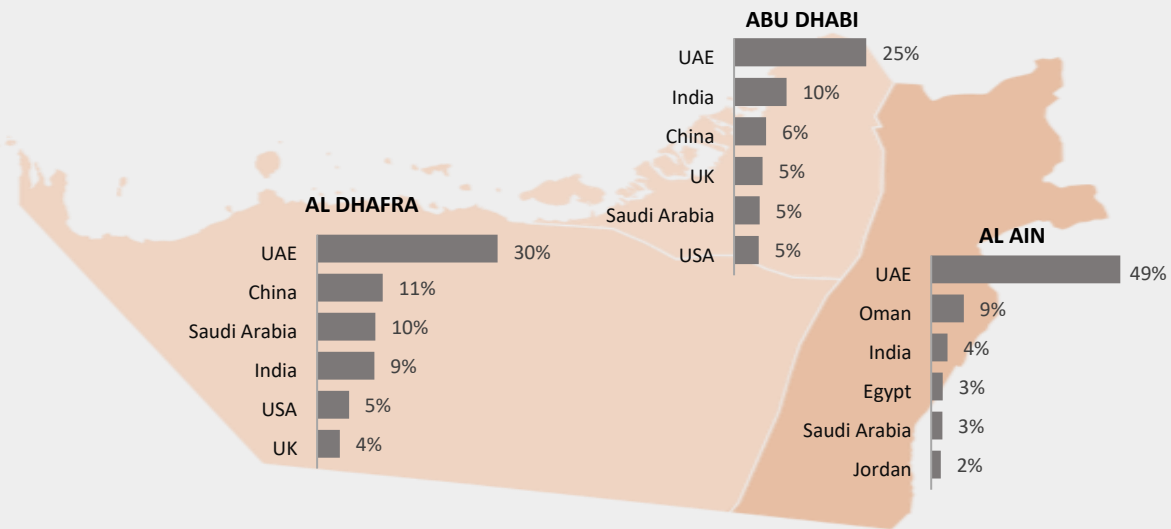
PERFORMANCE BY REGION

FEBRUARY 2020

REGIONAL PERFORMANCE – FEB 2020

KEY INDICATORS	ABU DHABI			AL AIN		AL DHAFRA			
	Actual	% Change		Actual	% Change	Actual	% Change		
GUESTS	340,137	-4.4%	▼	40,935	8.5%	▲	10,870	-18.5%	▼
OCCUPANCY RATE	79%	-1.9%	▼	68%	4.2%	▲	64%	19.6%	▲
ALOS DAYS	2.9	7.0%	▲	1.8	-9.1%	▼	2.4	12.6%	▲
REVENUES (M AED)	433.8	-16.2%	▼	23.6	-3.3%	▼	24.7	-8.7%	▼
ARR (AED)	351	-24.9%	▼	258	-7.8%	▼	740	-10.8%	▼
REVPAR (AED)	277	-26.4%	▼	176	-3.9%	▼	475	6.7%	▲

TOP NATIONALITIES ACROSS REGIONS – YTD FEB 2020



REGIONAL PERFORMANCE – YTD FEB 2020

KEY INDICATORS	ABU DHABI			AL AIN		AL DHAFRA			
	Actual	% Change		Actual	% Change	Actual	% Change		
GUESTS	752,386	2.1%	▲	85,112	3.1%	▲	24,752	1.7%	▲
OCCUPANCY RATE	79%	-1.3%	▼	68%	-3.8%	▼	61%	17.7%	▲
ALOS DAYS	2.8	1.0%	▲	1.8	-10.2%	▼	2.2	-5.7%	▼
REVENUES (M AED)	903.9	-9.9%	▼	48.4	-12.5%	▼	49.3	-19.2%	▼
ARR (AED)	360	-14.5%	▼	264	-11.8%	▼	784	-15.2%	▼
REVPAR (AED)	285	-15.6%	▼	179	-15.2%	▼	480	-0.2%	▼

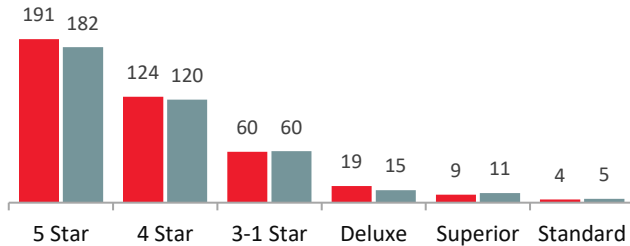
PERFORMANCE BY STAR RATING

FEBRUARY 2020

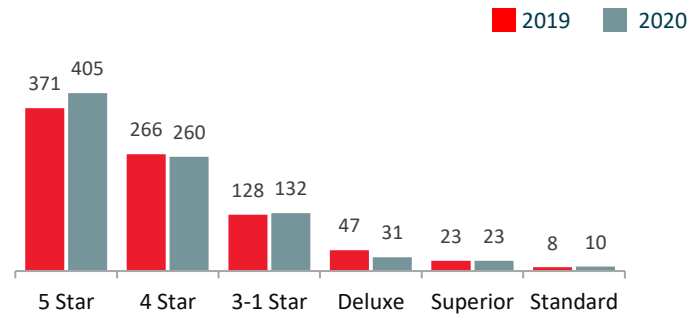


PERFORMANCE ACROSS KEY INDICATORS

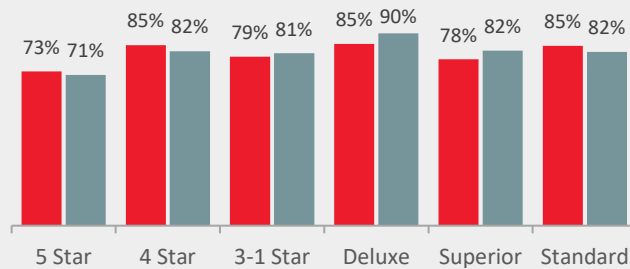
HOTEL GUESTS – FEB 2020



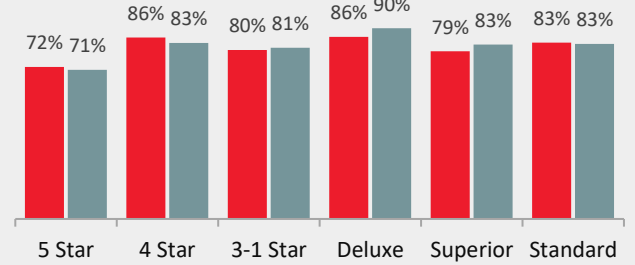
HOTEL GUESTS – YTD FEB 2020



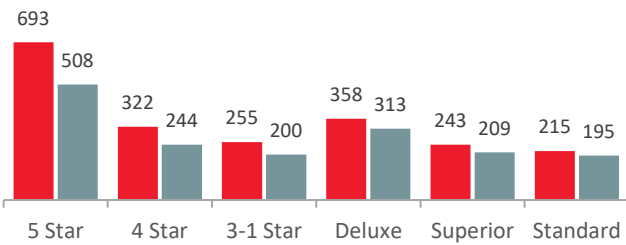
HOTEL OCCUPANCY – FEB 2020



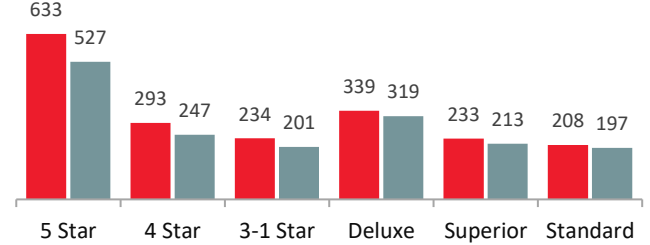
HOTEL OCCUPANCY – YTD FEB 2020



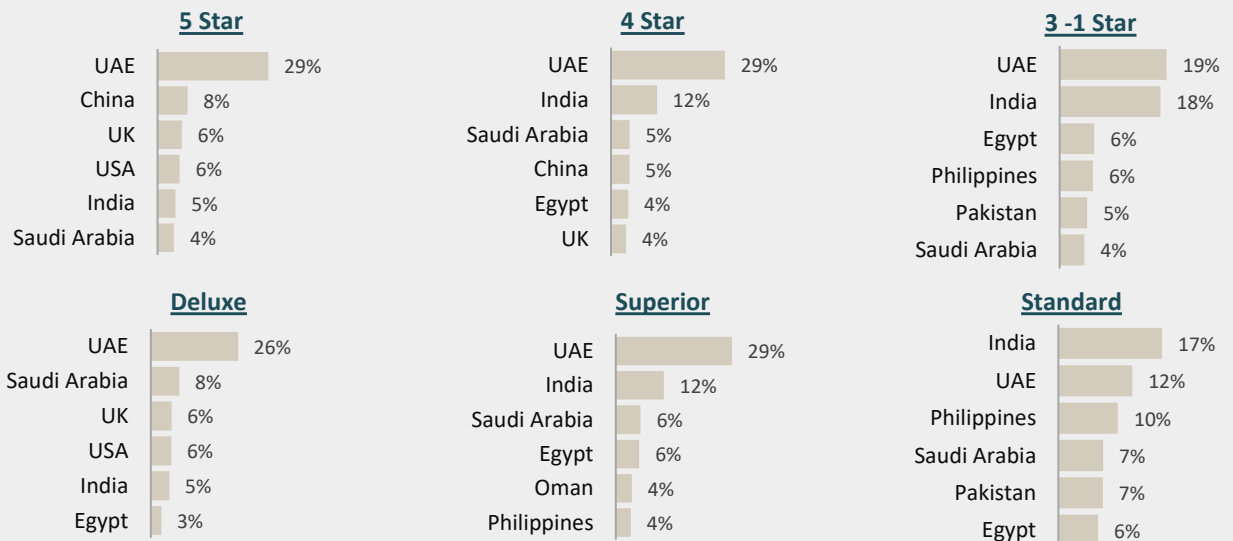
HOTEL ARR (AED) – FEB 2020



HOTEL ARR (AED) – YTD FEB 2020



TOP NATIONALITIES – YTD FEB 2020



YAS ISLAND PERFORMANCE

FEBRUARY 2020

HOTEL SUPPLY



7

HOTELS



2,259

ROOMS



OVERALL PERFORMANCE

KEY INDICATORS	FEB 2020		YTD FEB 2020	
	Actual	% Change	Actual	% Change
GUESTS	27,384	-16.9% ▼	65,226	-2.1% ▼
OCCUPANCY RATE	75%	-16.7% ▼	78%	-13.5% ▼
ALOS DAYS	2.7	3.2% ▲	2.6	-3.8% ▼
REVENUES (M AED)	27.2	-26.0% ▼	59.5	-19.8% ▼
ARR (AED)	324	-20.5% ▼	343	-10.3% ▼
REVPAR (AED)	245	-33.8% ▼	269	-22.5% ▼

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

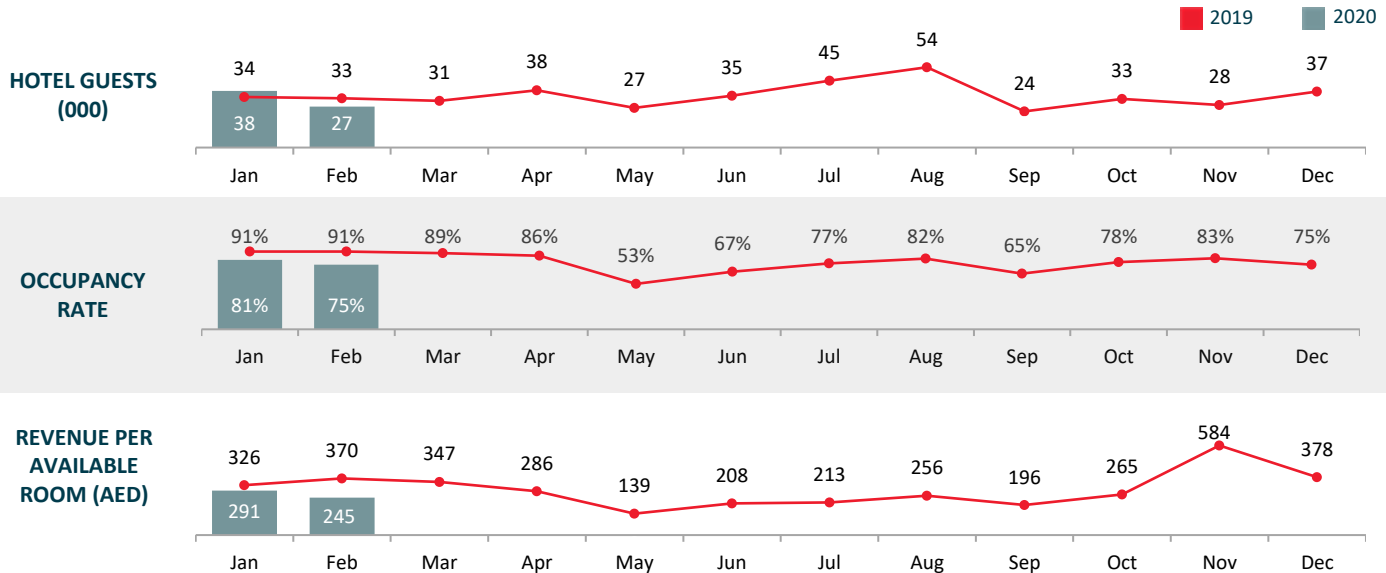
TOP NATIONALITIES (000s) – FEB 2020

Nationality	000s	% Change	% Share
UAE	6.2	-14.5%	22.7%
India	3.5	24.8%	12.8%
UK	2.9	20.5%	10.5%
USA	1.3	-16.8%	4.7%
Saudi Arabia	1.0	-4.2%	3.7%
Egypt	1.0	99.6%	3.6%
Germany	0.6	-36.3%	2.3%
France	0.6	2.3%	2.2%
Philippines	0.6	-35.0%	2.1%
Italy	0.5	-14.3%	1.9%
Kuwait	0.5	-21.9%	1.9%

TOP NATIONALITIES (000s) – YTD FEB 2020

Nationality	000s	% Change	% Share
UAE	12.8	-14.1%	19.6%
India	9.6	32.5%	14.7%
Saudi Arabia	5.6	87.8%	8.7%
UK	5.5	11.4%	8.4%
China	4.0	-48.5%	6.1%
USA	2.6	0.3%	4.0%
Egypt	1.8	69.6%	2.8%
France	1.3	35.7%	2.0%
Kuwait	1.3	-24.7%	2.0%
Philippines	1.2	-19.2%	1.9%
South Africa	1.1	10.6%	1.6%

MONTHLY TRENDS



SAADIYAT & NICHE AREAS PERFORMANCE

FEBRUARY 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	FEB 2020		YTD FEB 2020	
	Actual	% Change	Actual	% Change
GUESTS	13,754	5.3% ▲	25,700	9.1% ▲
OCCUPANCY RATE	65%	-4.2% ▼	61%	3.2% ▲
ALOS DAYS	4.3	3.3% ▲	4.4	7.1% ▲
REVENUES (M AED)	61.2	-4.8% ▼	127.1	7.2% ▲
ARR (AED)	892	-25.7% ▼	985	-18.7% ▼
REVPAR (AED)	578	-28.8% ▼	599	-16.1% ▼

TOP NATIONALITIES (000s) – FEB 2020

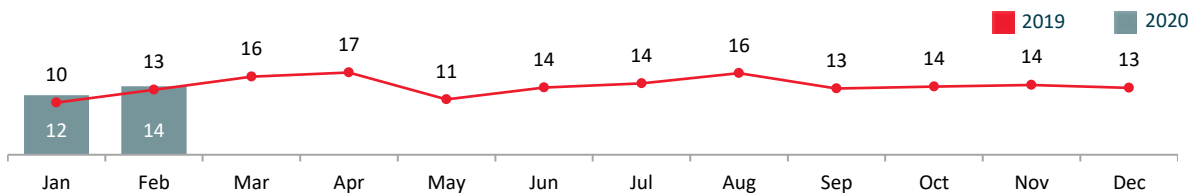
Nationality	Count (000s)	% Change	% Share
UAE	2.5	14.9%	18.0%
UK	2.1	5.9%	15.4%
Germany	1.6	4.3%	11.8%
Russia	1.0	7.4%	7.0%
France	0.9	31.2%	6.4%
USA	0.5	-7.2%	3.9%
Switzerland	0.5	36.8%	3.6%
Italy	0.4	-17.0%	2.9%
Saudi Arabia	0.4	-9.1%	2.9%
Belgium	0.3	82.3%	1.9%
India	0.3	-39.2%	1.9%

TOP NATIONALITIES (000s) – YTD FEB 2020

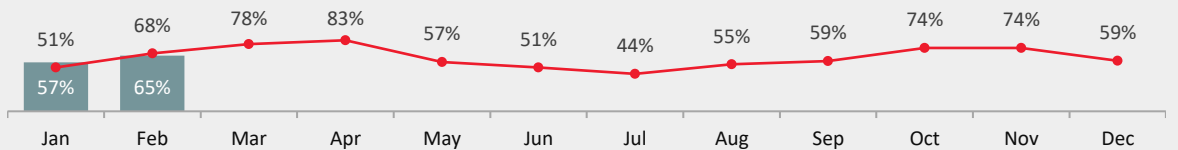
Nationality	Count (000s)	% Change	% Share
UAE	4.7	-5.2%	18.2%
UK	3.2	14.9%	12.3%
Russia	2.6	58.9%	10.1%
Germany	2.5	2.1%	9.9%
France	1.4	34.7%	5.3%
Saudi Arabia	1.0	55.1%	4.0%
USA	0.9	-6.3%	3.5%
Italy	0.9	8.0%	3.3%
Switzerland	0.8	56.2%	3.1%
Kazakhstan	0.6	6.2%	2.3%
India	0.6	-50.0%	2.2%

MONTHLY TRENDS

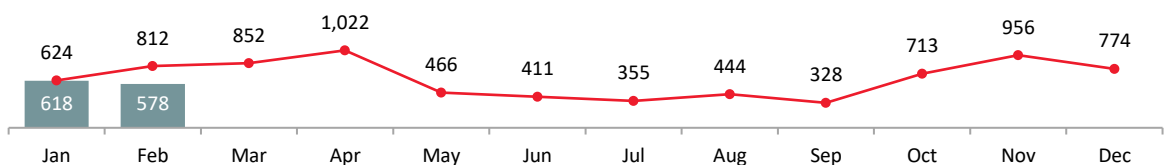
HOTEL GUESTS (000)



OCCUPANCY RATE



REVENUE PER AVAILABLE ROOM (AED)



ADNEC PERFORMANCE

FEBRUARY 2020

HOTEL SUPPLY



6

HOTELS



1,827

ROOMS



OVERALL PERFORMANCE

KEY INDICATORS	FEB 2020		YTD FEB 2020	
	Actual	% Change	Actual	% Change
GUESTS	20,571	-8.7% ▼	51,408	7.5% ▲
OCCUPANCY RATE	86%	-1.5% ▼	87%	-1.0% ▼
ALOS DAYS	3.3	11.1% ▲	3.0	-6.5% ▼
REVENUES (M AED)	18.2	-20.8% ▼	35.5	-14.6% ▼
ARR (AED)	290	-27.9% ▼	273	-19.1% ▼
REVPAR (AED)	250	-29.0% ▼	237	-19.9% ▼

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

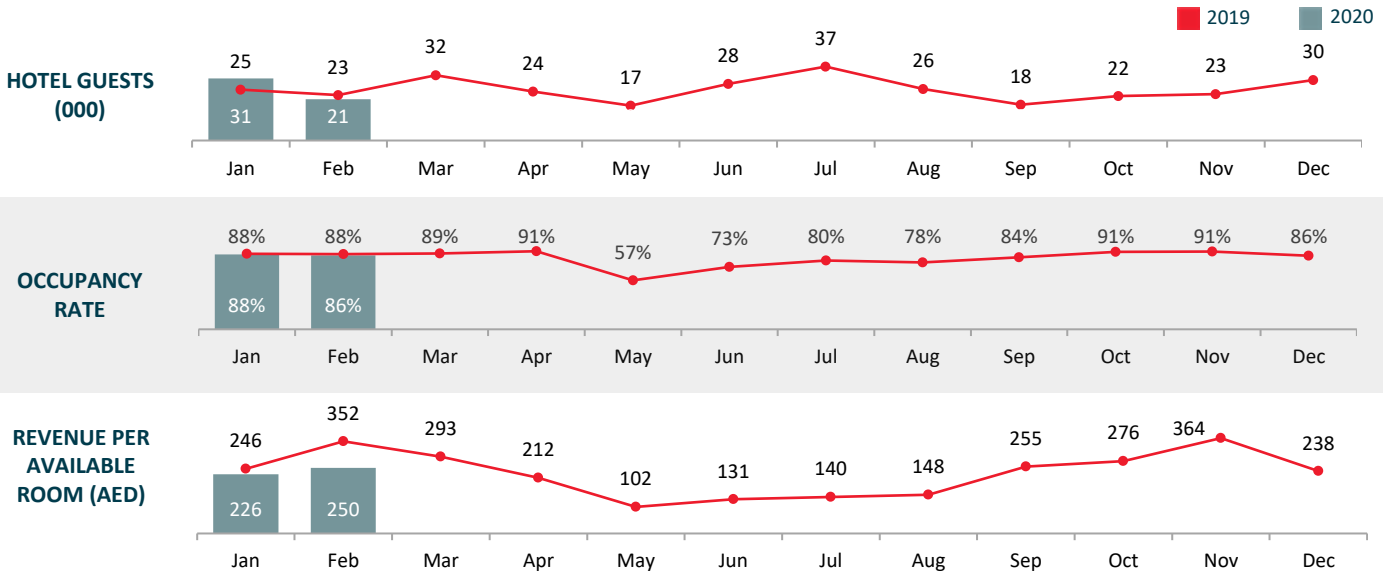
TOP NATIONALITIES (000s) – FEB 2020

Nationality	Count (000s)	% Change	% Share
UAE	7.8	10.0%	38.1%
India	1.3	-26.6%	6.2%
USA	0.9	31.5%	4.5%
Egypt	0.9	16.2%	4.5%
Pakistan	0.7	16.8%	3.2%
UK	0.7	-6.2%	3.2%
Jordan	0.5	-13.9%	2.6%
Saudi Arabia	0.5	-17.2%	2.5%
Philippines	0.5	-64.1%	2.3%
China	0.4	-72.2%	2.1%
France	0.4	12.8%	1.7%

TOP NATIONALITIES (000s) – YTD FEB 2020

Nationality	Count (000s)	% Change	% Share
UAE	18.6	14.1%	36.2%
Saudi Arabia	3.5	92.1%	6.8%
India	3.4	14.0%	6.6%
China	2.9	-17.1%	5.6%
Egypt	2.2	28.5%	4.3%
USA	1.7	28.3%	3.3%
UK	1.6	-4.6%	3.0%
Jordan	1.3	-8.5%	2.5%
Philippines	1.1	-44.3%	2.2%
Pakistan	1.1	-17.6%	2.1%
Germany	0.8	-12.3%	1.6%

MONTHLY TRENDS



ABU DHABI ISLAND PERFORMANCE*

FEBRUARY 2020

*Abu Dhabi Island includes Corniche, Marina, Bateen, Al Markaziyah, Al Zahiya, Al Maryah Island, Al Reem Island, Al Maqtaa Creek, Al Gurm Corniche, Zayed Sports City, Khalifa City & Raha Beach & Outskirts

HOTEL SUPPLY



118
HOTELS



23,265
ROOMS



OVERALL PERFORMANCE

KEY INDICATORS	FEB 2020		YTD FEB 2020	
	Actual	% Change	Actual	% Change
GUESTS	278,428	-3.1% ▼	610,052	1.9% ▲
OCCUPANCY RATE	80%	-0.1% ▼	80%	-0.1% ▼
ALOS DAYS	2.8	7.1% ▲	2.7	1.7% ▲
REVENUES (M AED)	327.2	-16.9% ▼	681.9	-11.3% ▼
ARR (AED)	326	-25.3% ▼	334	-14.9% ▼
REVPAR (AED)	259	-25.4% ▼	267	-14.9% ▼

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

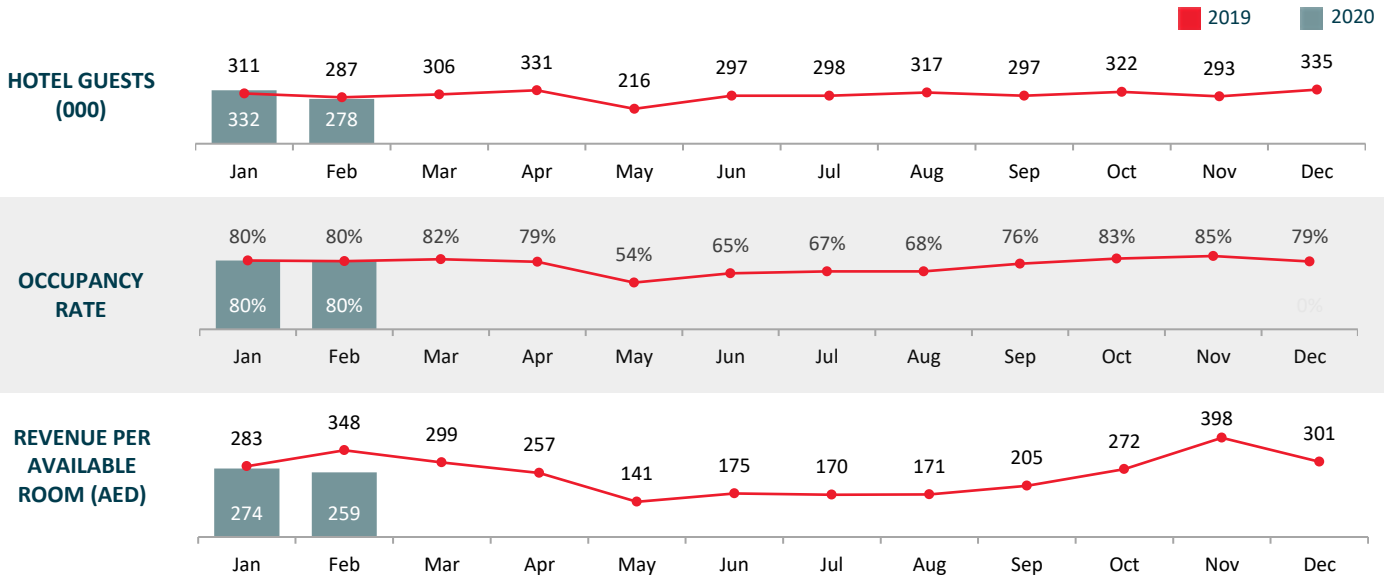
TOP NATIONALITIES (000s) – FEB 2020

Nationality	Count (000s)	% Change	% Share
UAE	70.2	15.5%	25.2%
India	29.9	25.8%	10.7%
UK	15.3	-2.0%	5.5%
Egypt	14.2	10.6%	5.1%
USA	13.8	-2.4%	5.0%
Philippines	9.2	9.1%	3.3%
Germany	8.6	-6.9%	3.1%
France	7.9	9.7%	2.9%
Jordan	6.8	-0.8%	2.4%
Pakistan	6.3	-3.6%	2.3%
China	6.2	-82.0%	2.2%

TOP NATIONALITIES (000s) – YTD FEB 2020

Nationality	Count (000s)	% Change	% Share
UAE	148.4	12.4%	24.3%
India	59.6	23.6%	9.8%
China	37.3	-47.4%	6.1%
UK	29.6	-5.7%	4.9%
USA	29.0	5.1%	4.8%
Egypt	26.5	8.9%	4.3%
Saudi Arabia	25.5	45.9%	4.2%
Philippines	17.9	3.0%	2.9%
Germany	15.8	-6.2%	2.6%
Jordan	15.1	-0.4%	2.5%
Russia	14.9	38.9%	2.4%

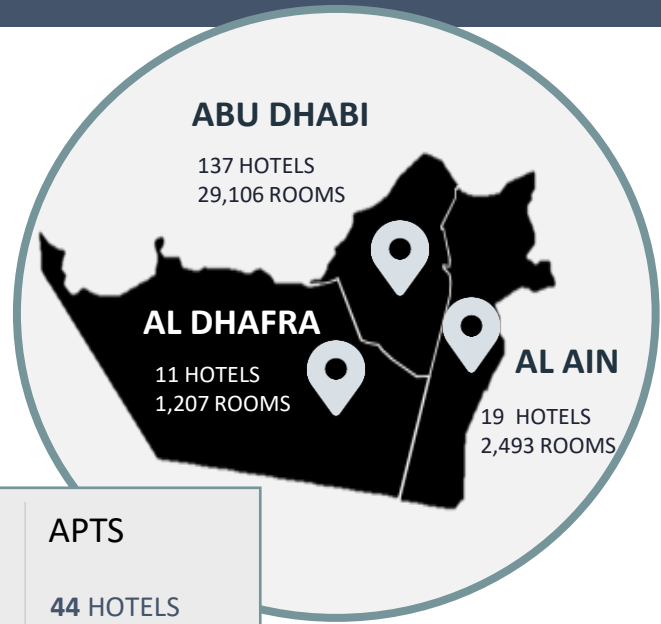
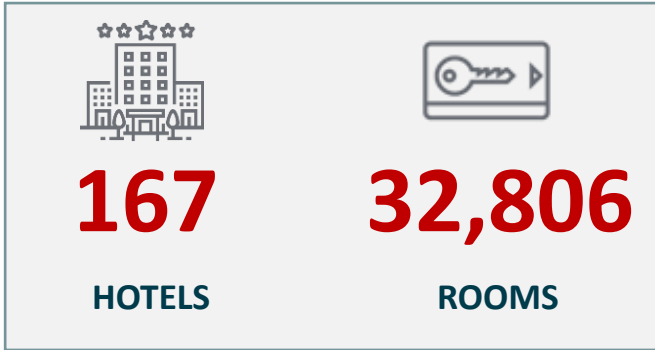
MONTHLY TRENDS



HOTEL SUPPLY

FEBRUARY 2020

HOTEL SUPPLY AS OF JANUARY 2020



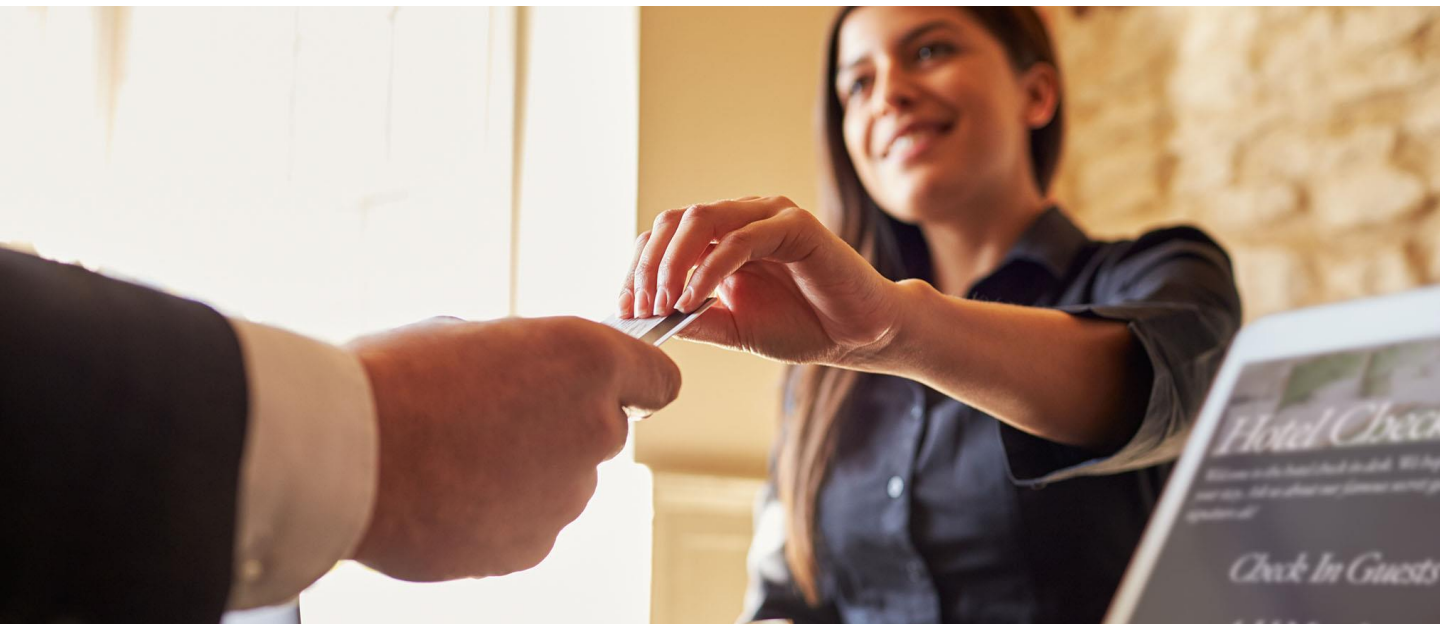
STAR RATING	5 STAR	4 STAR	1-3 STAR	APTS
	54 HOTELS 15,154 ROOMS	36 HOTELS 7,604 ROOMS	33 HOTELS 4,600 ROOMS	44 HOTELS 5,448 ROOMS

RECENT SUPPLY ADDITIONS AND CLOSURES - 2020



CLOSED: JAN 2020

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



FEBRUARY 2020

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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