

ABU DHABI

HOTEL PERFORMANCE REPORT

NOVEMBER 2020



دائرة الثقافة والسياحة
DEPARTMENT OF CULTURE
AND TOURISM



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OVERALL PERFORMANCE

NOVEMBER 2020



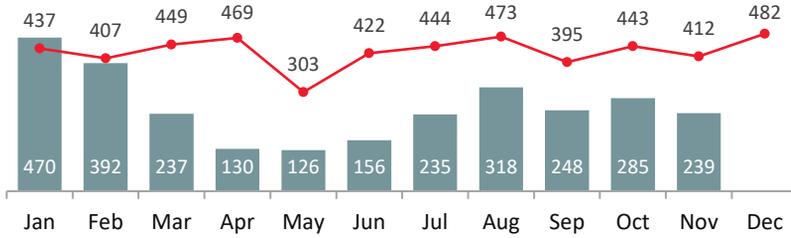
HOTEL GUESTS (000)

■ 2019 ■ 2020

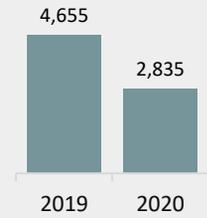
% Change
(Nov 2020)

YTD (JAN- NOV)

From
Previous Year

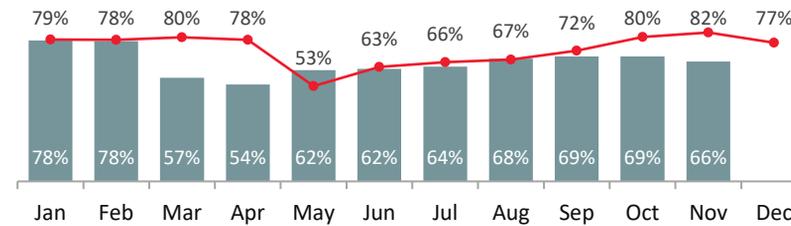


-42.1%

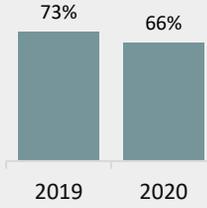


-39.1%

OCCUPANCY RATE



-19.5%

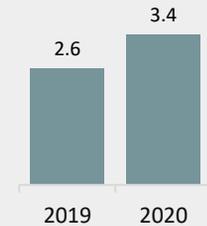


-9.0%

AVERAGE LENGTH OF STAY (ALOS-NIGHTS)

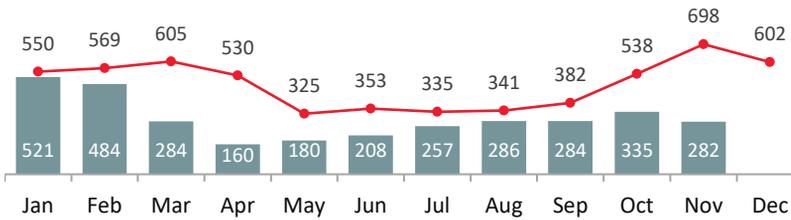


+17.6%

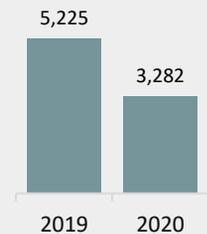


+29.1%

HOTEL TOTAL REVENUE (MILLION AED)

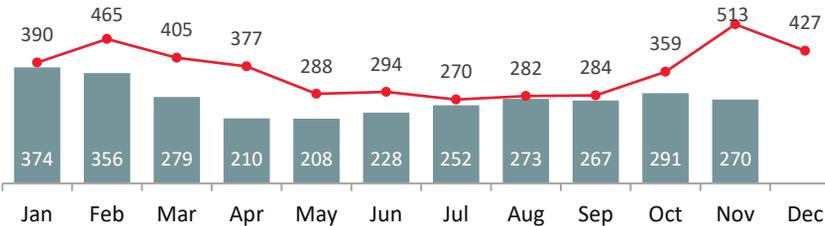


-59.5%

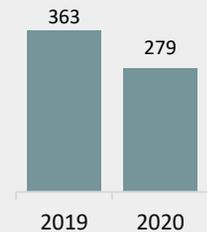


-37.2%

AVERAGE ROOM RATE (AED)

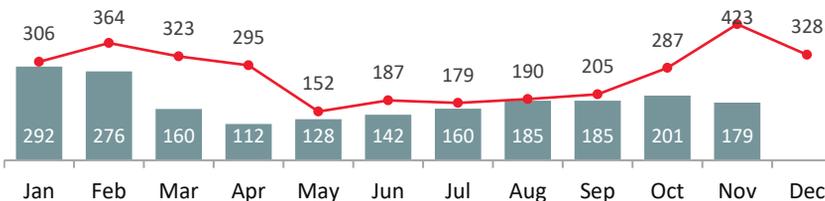


-47.4%

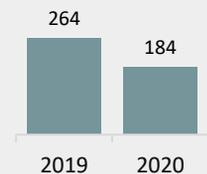


-23.3%

REVENUE PER AVAILABLE ROOM (AED)



-57.6%



-30.1%

HOTEL GUESTS BY NATIONALITY

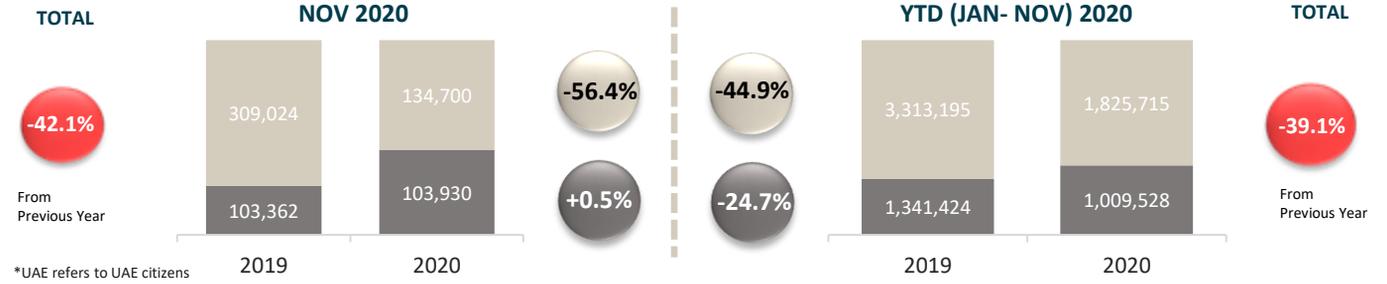
NOVEMBER 2020



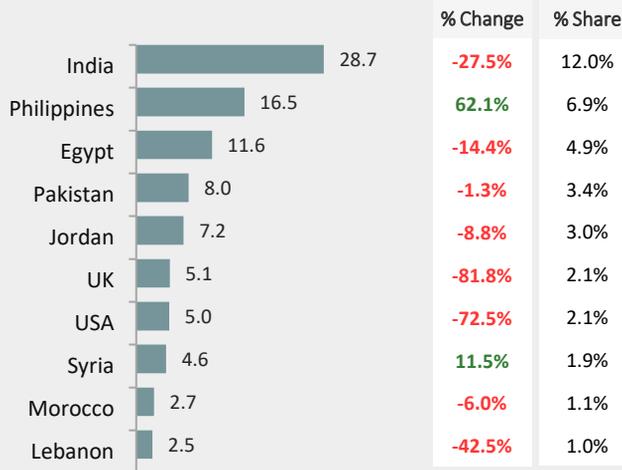
UAE VS. NON-UAE HOTEL GUESTS

238,630

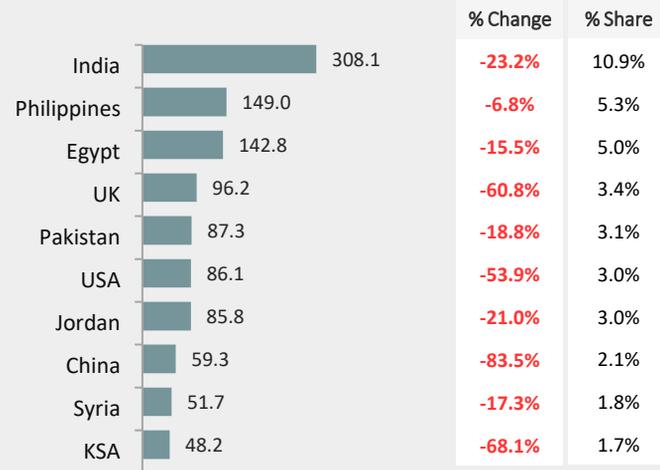
2,835,243



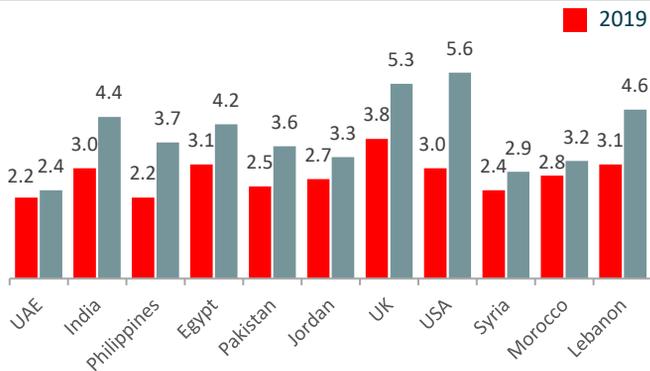
TOP 10 NON-UAE NATIONALITIES (000s) – NOV 2020



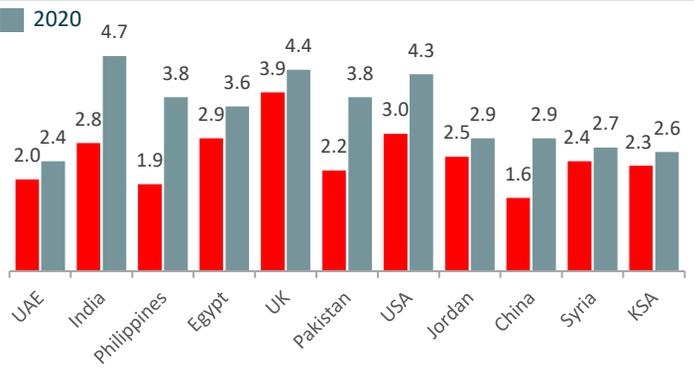
TOP 10 NON-UAE NATIONALITIES (000s) YTD NOV 2020



ALOS (NIGHTS) – NOV 2020



ALOS (NIGHTS) – YTD NOV 2020



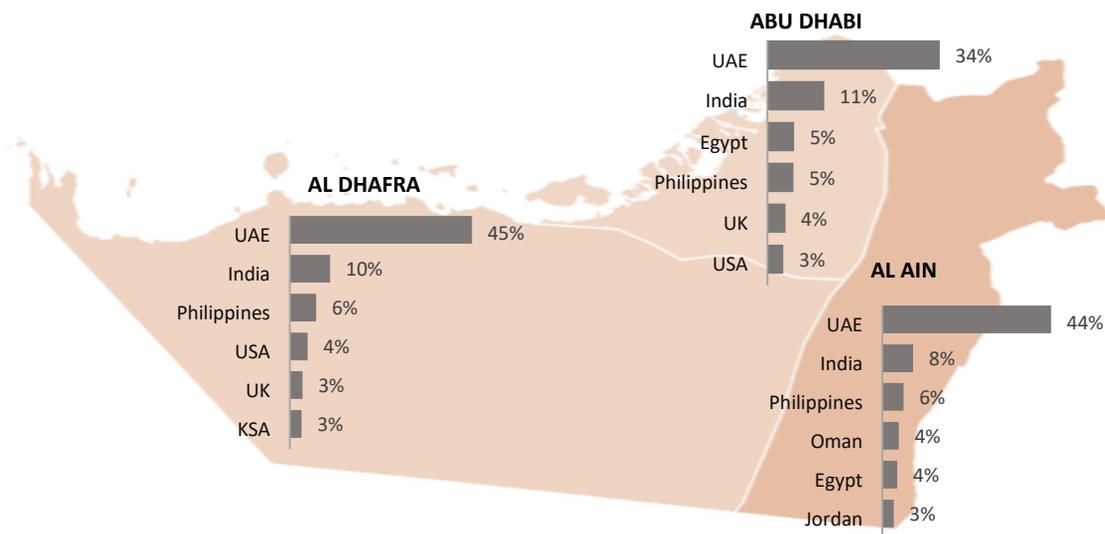
PERFORMANCE BY REGION

NOVEMBER 2020

REGIONAL PERFORMANCE – NOV 2020

KEY INDICATORS	ABU DHABI			AL AIN			AL DHAFRA		
	Actual	% Change		Actual	% Change		Actual	% Change	
GUESTS	198,517	-44.6%	▼	29,385	-30.1%	▼	10,728	-12.3%	▼
OCCUPANCY RATE	66%	-21.6%	▼	67%	4.5%	▲	60%	3.4%	▲
ALOS DAYS	3.6	16.8%	▲	2.6	47.8%	▲	2.7	21.1%	▲
REVENUES (M AED)	244.2	-62.4%	▼	19.9	-19.5%	▼	18.3	-23.9%	▼
ARR (AED)	262	-49.9%	▼	259	-4.8%	▼	490	-33.5%	▼
REVPAR (AED)	174	-60.7%	▼	174	-0.5%	▼	296	-31.2%	▼

TOP NATIONALITIES ACROSS REGIONS – YTD NOV 2020



REGIONAL PERFORMANCE – YTD NOV 2020

KEY INDICATORS	ABU DHABI			AL AIN			AL DHAFRA		
	Actual	% Change		Actual	% Change		Actual	% Change	
GUESTS	2,436,447	-40.3%	▼	297,243	-33.8%	▼	101,553	-17.0%	▼
OCCUPANCY RATE	66%	-10.9%	▼	63%	4.6%	▲	62%	33.5%	▲
ALOS DAYS	3.5	29.8%	▲	2.4	31.8%	▲	2.6	20.9%	▲
REVENUES (M AED)	2,876.0	-39.7%	▼	186.6	-27.5%	▼	218.9	8.5%	▲
ARR (AED)	274	-24.5%	▼	232	-13.7%	▼	538	-17.6%	▼
REVPAR (AED)	182	-32.7%	▼	146	-9.7%	▼	333	10.1%	▲

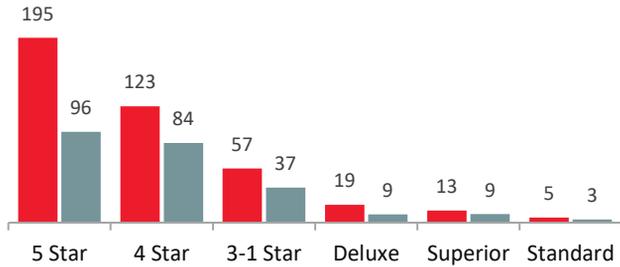
PERFORMANCE BY STAR RATING

NOVEMBER 2020

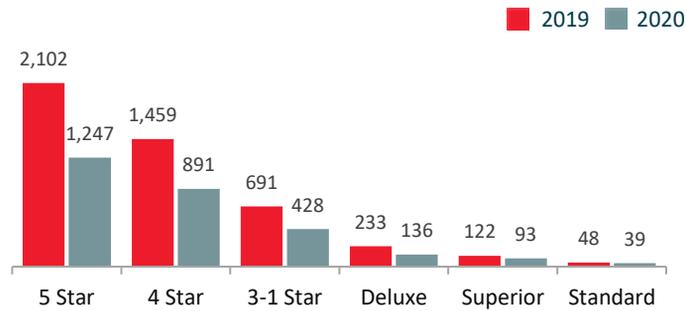


PERFORMANCE ACROSS KEY INDICATORS*

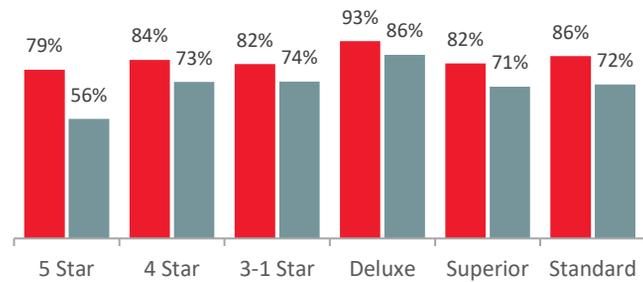
HOTEL GUESTS – NOV 2020



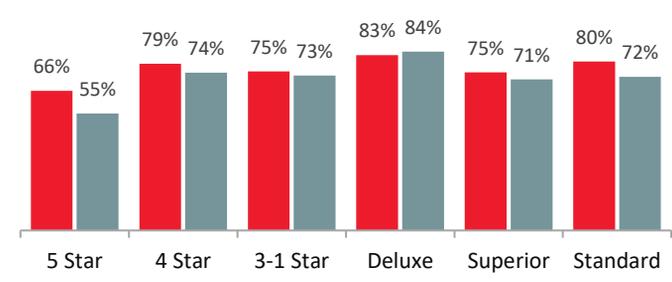
HOTEL GUESTS – YTD NOV 2020



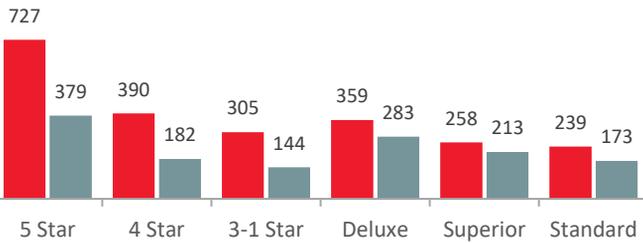
HOTEL OCCUPANCY – NOV 2020



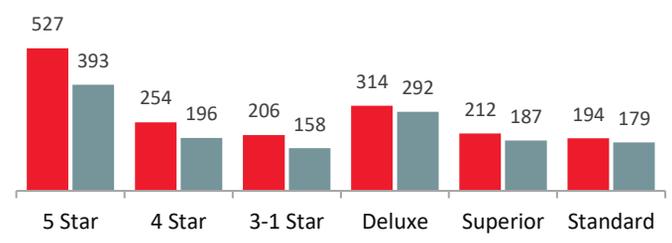
HOTEL OCCUPANCY – YTD NOV 2020



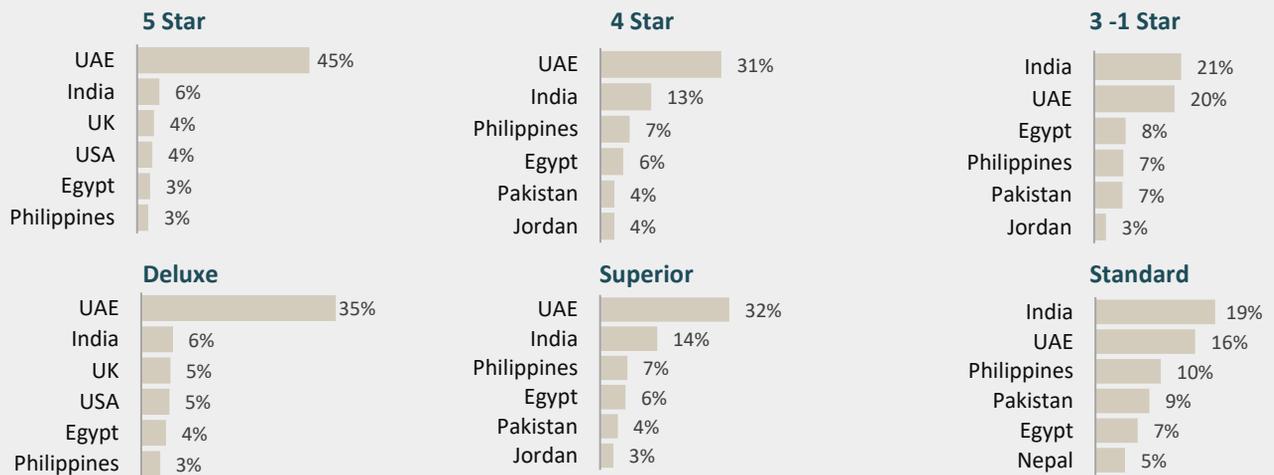
HOTEL ARR (AED) – NOV 2020



HOTEL ARR (AED) – YTD NOV 2020



TOP NATIONALITIES – YTD NOV 2020



*Note: Jumeriah at Etihad towers was rebranded to Conrad Abu Dhabi Etihad Towers on Oct 1. The establishment's October performance includes combined performance for both Etihad towers and apartments under 5-star classification. This may be subject to change under certain circumstances

YAS ISLAND PERFORMANCE

NOVEMBER 2020

HOTEL SUPPLY



7

HOTELS



2,259

ROOMS



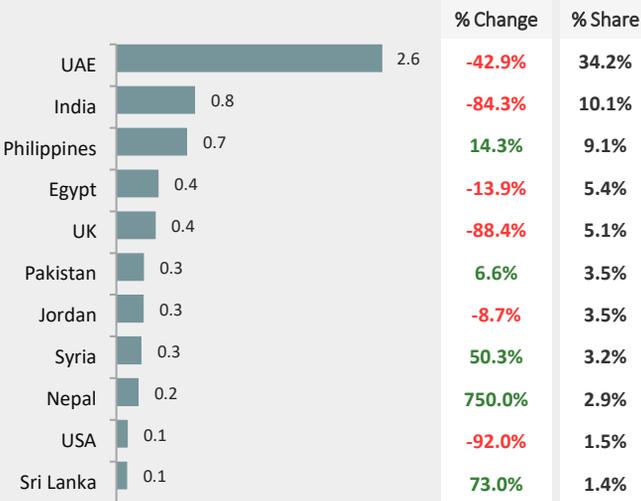
OVERALL PERFORMANCE*

KEY INDICATORS	NOV 2020		YTD NOV 2020	
	Actual	% Change	Actual	% Change
GUESTS	7,741	-72.8% ▼	115,375	-69.7% ▼
OCCUPANCY RATE	47%	-43.7% ▼	51%	-34.9% ▼
ALOS NIGHTS	3.9	31.4% ▲	4.1	63.3% ▲
REVENUES (M AED)	7.2	-87.6% ▼	175.5	-50.7% ▼
ARR (AED)	200	-71.6% ▼	291	-21.3% ▼
REVPAR (AED)	93	-84.0% ▼	148	-48.7% ▼

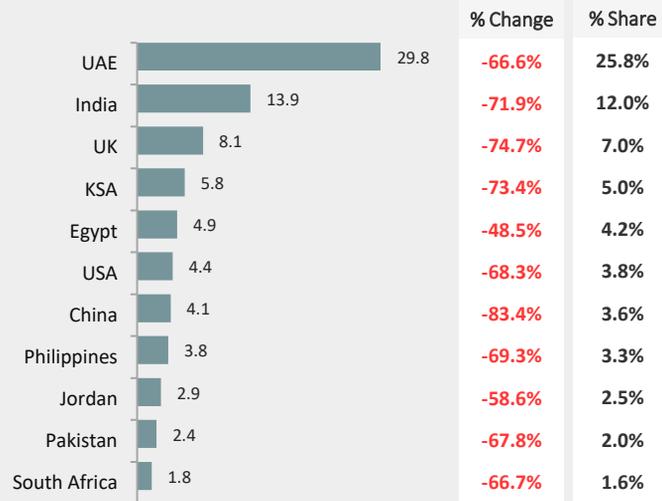
*Note: Revenue metrics (ARR, REVPAR and Total Rev) are subject to some adjustments

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

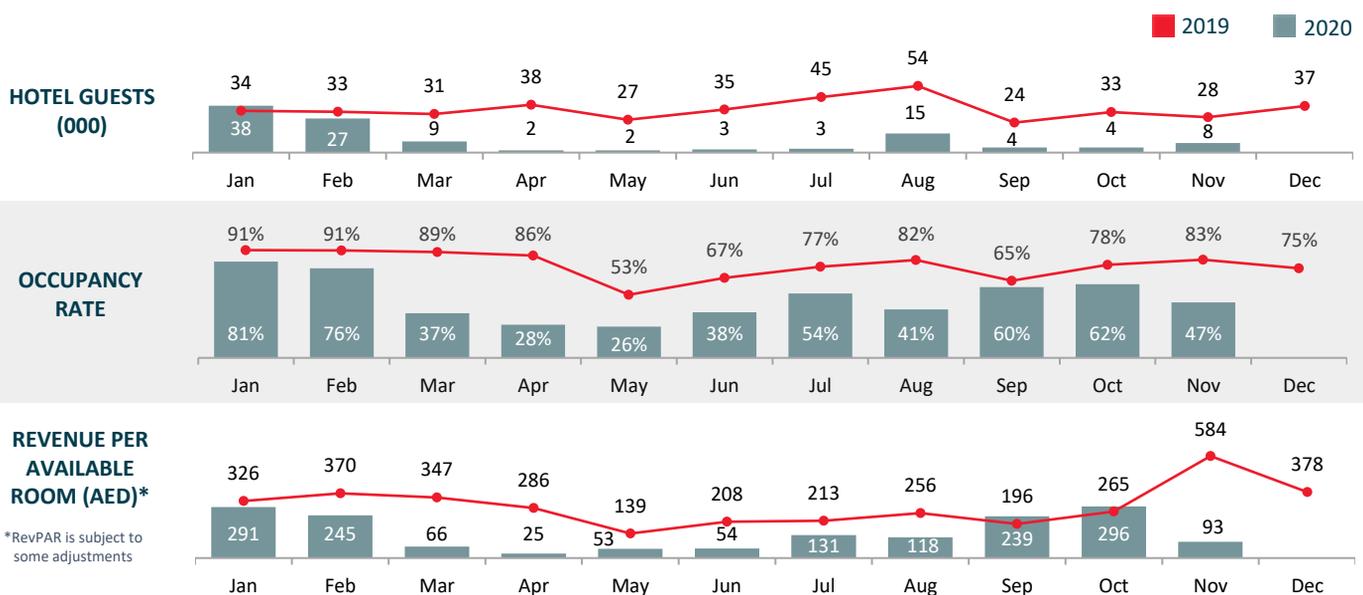
TOP NATIONALITIES (000s) – NOV 2020



TOP NATIONALITIES (000s) – YTD NOV 2020



MONTHLY TRENDS



SAADIYAT & NICHE AREAS PERFORMANCE

NOVEMBER 2020

HOTEL SUPPLY



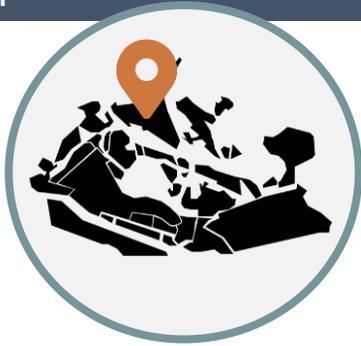
6

HOTELS



1,755

ROOMS



OVERALL PERFORMANCE

KEY INDICATORS	NOV 2020		YTD NOV 2020	
	Actual	% Change	Actual	% Change
GUESTS	10,613	-24.1%	135,310	-11.0%
OCCUPANCY RATE	38%	-48.3%	38%	-39.3%
ALOS NIGHTS	2.1	-53.0%	2.6	-37.8%
REVENUES (M AED)	36.0	-60.5%	381.6	-39.2%
ARR (AED)	1,072	-17.1%	998	-0.8%
REVPAR (AED)	410	-57.1%	382	-39.8%

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

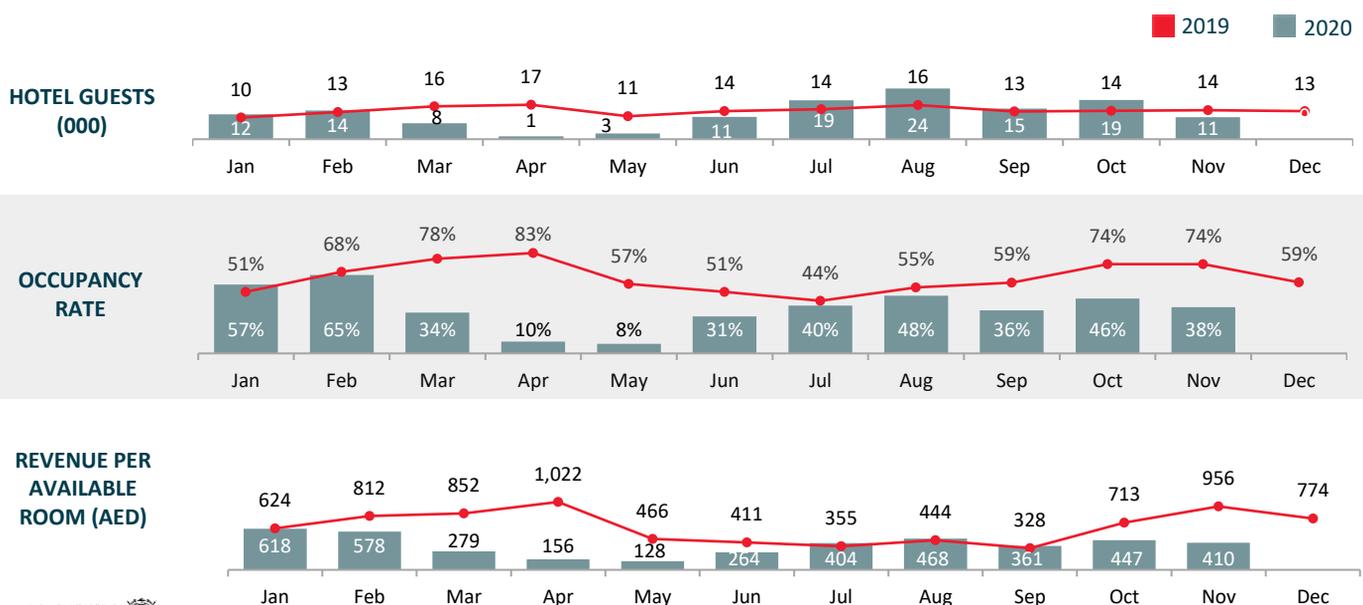
TOP NATIONALITIES (000s) – NOV 2020

Nationality	Count (000s)	% Change	% Share
UAE	7.0	123.9%	65.7%
UK	0.4	-69.2%	4.1%
India	0.4	49.4%	3.4%
Philippines	0.3	1,300.0%	3.0%
USA	0.2	-60.1%	1.9%
Jordan	0.2	29.5%	1.8%
France	0.2	-69.4%	1.7%
Lebanon	0.2	0.6%	1.5%
Egypt	0.2	42.5%	1.5%
Canada	0.1	-30.3%	1.0%
Syria	0.1	102.3%	0.8%

TOP NATIONALITIES (000s) – YTD NOV 2020

Nationality	Count (000s)	% Change	% Share
UAE	75.1	77.8%	55.5%
UK	9.0	-50.1%	6.7%
Germany	4.0	-77.0%	2.9%
Russia	3.8	-62.3%	2.8%
USA	3.2	-15.1%	2.4%
France	3.1	-35.3%	2.3%
Egypt	2.8	75.4%	2.1%
Jordan	2.8	91.1%	2.0%
Lebanon	2.7	41.7%	2.0%
India	2.2	-32.8%	1.6%
Philippines	1.8	37.7%	1.3%

MONTHLY TRENDS



ADNEC PERFORMANCE

NOVEMBER 2020

HOTEL SUPPLY



6

HOTELS



1,827

ROOMS



OVERALL PERFORMANCE

KEY INDICATORS	NOV 2020		YTD NOV 2020	
	Actual	% Change	Actual	% Change
GUESTS	16,414	-29.0%	172,159	-37.5%
OCCUPANCY RATE	80%	-11.9%	78%	-5.8%
ALOS NIGHTS	3.9	20.0%	4.2	34.5%
REVENUES (M AED)	10.7	-60.3%	131.4	-31.3%
ARR (AED)	172	-57.1%	196	-28.9%
REVPAR (AED)	138	-62.2%	152	-33.1%

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

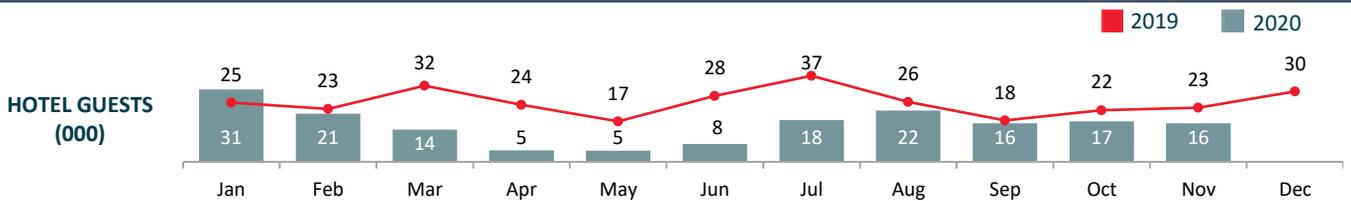
TOP NATIONALITIES (000s) – NOV 2020

Nationality	Count	% Change	% Share
UAE	8.3	39.8%	50.3%
India	1.3	-11.9%	7.7%
Egypt	0.9	11.2%	5.4%
Jordan	0.7	25.2%	4.1%
Philippines	0.6	6.3%	3.8%
Pakistan	0.5	-15.0%	2.8%
UK	0.4	-74.6%	2.2%
Syria	0.3	40.5%	1.9%
USA	0.3	-65.3%	1.9%
Lebanon	0.2	-16.2%	1.4%
Palestine	0.2	140.0%	1.2%

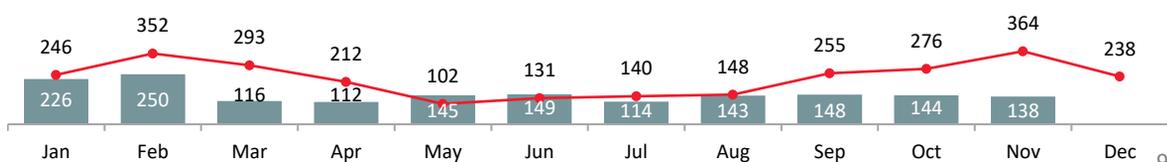
TOP NATIONALITIES (000s) – YTD NOV 2020

Nationality	Count	% Change	% Share
UAE	78.5	-17.0%	45.6%
India	13.0	-25.5%	7.5%
Egypt	8.6	-23.7%	5.0%
Philippines	6.2	-43.5%	3.6%
Jordan	5.9	-24.4%	3.4%
Pakistan	5.3	-26.9%	3.1%
KSA	4.0	-58.6%	2.3%
USA	3.9	-52.7%	2.3%
UK	3.8	-59.0%	2.2%
China	3.3	-83.6%	1.9%
Syria	3.0	-28.0%	1.7%

MONTHLY TRENDS



REVENUE PER AVAILABLE ROOM (AED)



ABU DHABI ISLAND PERFORMANCE

NOVEMBER 2020

HOTEL SUPPLY*



115

HOTELS



22,995

ROOMS



OVERALL PERFORMANCE

KEY INDICATORS	NOV 2020		YTD NOV 2020	
	Actual	% Change	Actual	% Change
GUESTS	163,749	-44.0% ▼	2,013,603	-38.5% ▼
OCCUPANCY RATE	69%	-19.1% ▼	69%	-7.4% ▼
ALOS NIGHTS	3.6	21.4% ▲	3.5	32.6% ▲
REVENUES (M AED)	190.3	-59.7% ▼	2,187.6	-39.1% ▼
ARR (AED)	240	-48.5% ▼	251	-24.0% ▼
REVPAR (AED)	166	-58.3% ▼	173	-29.6% ▼

STAR RATING	5 STAR	4 STAR	1-3 STAR	APTS
	36 HOTELS	23 HOTELS	20 HOTELS	36 HOTELS
	11,317 ROOMS	4,795 ROOMS	2,353 ROOMS	4,530 ROOMS

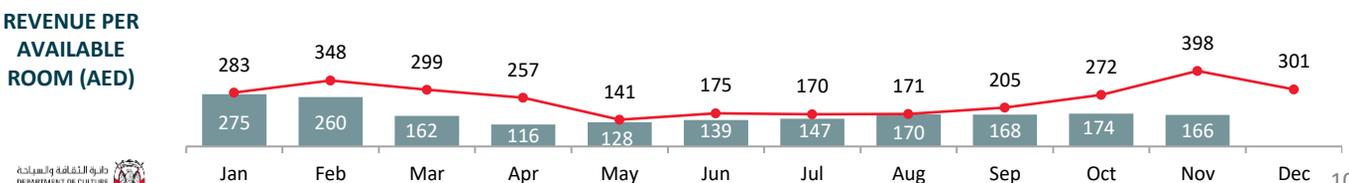
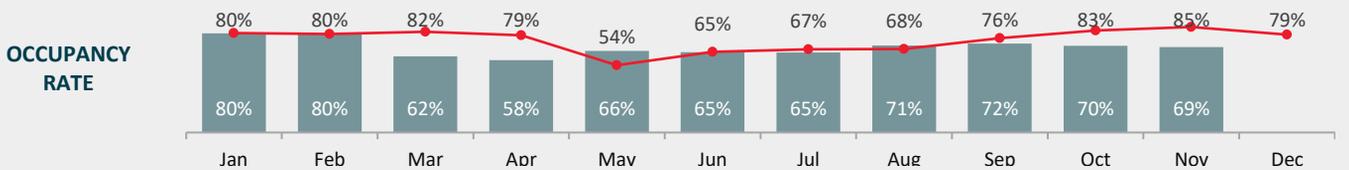
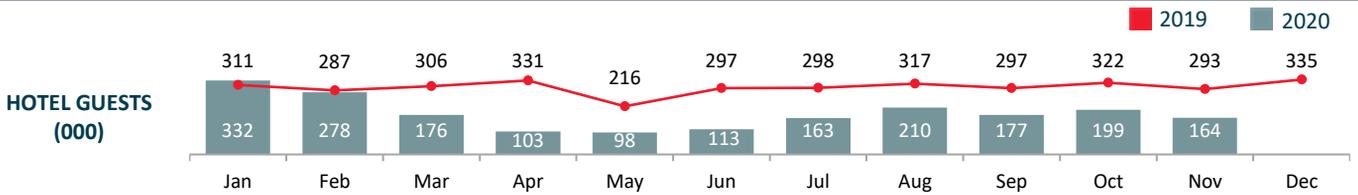
TOP NATIONALITIES (000s) – NOV 2020

Nationality	Count (000s)	% Change	% Share
UAE	66.6	-0.6%	40.7%
India	21.6	-24.8%	13.2%
Philippines	11.5	45.9%	7.0%
Egypt	8.9	-14.3%	5.5%
Pakistan	6.0	-3.4%	3.7%
Jordan	5.2	-11.5%	3.2%
USA	3.9	-73.1%	2.4%
UK	3.4	-83.4%	2.1%
Syria	3.1	7.4%	1.9%
Morocco	2.0	-5.8%	1.2%
Sudan	1.8	23.9%	1.1%

TOP NATIONALITIES (000s) – YTD NOV 2020

Nationality	Count (000s)	% Change	% Share
UAE	648.2	-25.2%	32.2%
India	244.7	-17.5%	12.2%
Philippines	114.0	-6.3%	5.7%
Egypt	112.9	-12.9%	5.6%
Pakistan	68.6	-15.4%	3.4%
UK	66.2	-61.6%	3.3%
USA	65.5	-56.0%	3.3%
Jordan	63.4	-19.5%	3.1%
China	47.5	-84.0%	2.4%
Syria	37.2	-10.2%	1.8%
KSA	30.6	-66.4%	1.5%

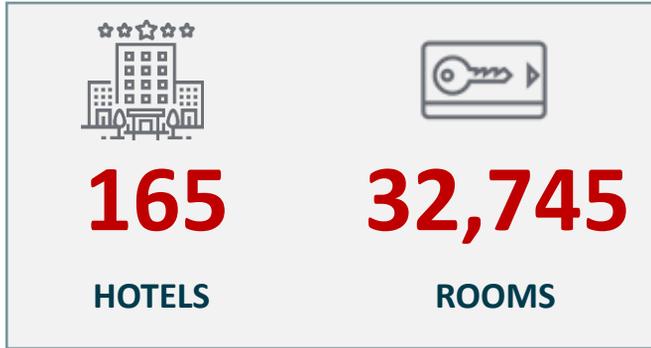
MONTHLY TRENDS



HOTEL SUPPLY

NOVEMBER 2020

HOTEL SUPPLY AS OF 30th NOVEMBER 2020



STAR RATING	5 STAR	4 STAR	1-3 STAR	APTS
	54 HOTELS 15,185 ROOMS	38 HOTELS 7,975 ROOMS	31 HOTELS 4,264 ROOMS	42 HOTELS 5,321 ROOMS

Quarantine Hotels: 7 properties continue to be used for quarantine purposes in November. Of these, 6 properties were used as a quarantine facility for the entire month, while 1 hotel was removed since mid Nov. As of Dec 12, 6 hotels are currently being used for quarantine reasons.

Temporary Closed Hotels: 8 hotels were temporarily closed in November. 4 hotels (455 rooms) remained closed for the entire month, while the remaining 4 hotels were closed during some point in November (1,060 rooms). Al Dhafra Beach Hotel resumed its room operations in the past month (26th Nov)

Yas Island Hotels: Since 10th Nov, hotels in Yas Island were under lockdown to accommodate guests from F1 committee (W Yas : 10th Nov; Yas Plaza Hotels : 19th Nov – except Staybridge suites which remained temporary closed)

RECENT SUPPLY ADDITIONS AND CLOSURES - 2020

Closures



CLOSED: JAN 2020

BIN MAJID 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



CLOSED: SEP 2020

MURJAN ASFAR HOTEL APT
LOCATION: ABU DHABI ISLAND
TYPE: SUPERIOR APT
ROOMS: 92



CLOSED: OCT 2020

RAMEE GARDEN HOTEL APT
LOCATION: ABU DHABI ISLAND
TYPE: STANDARD APT
ROOMS: 36

Additions



OPEN: MAR/OCT 2020*

REMAL HOTEL
LOCATION: AL DHAFRA
TYPE: 4 STAR
ROOMS: 205

*Remal Hotel, located in Al Dhafra region, was issued a temporary license in March and has been recently upgraded to a 4-star property (Oct). As a result, this hotel has been now added into the supply



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

Disclaimer:

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