

# ABU DHABI

## HOTEL PERFORMANCE REPORT

APRIL 2020

دائرة الثقافة والسياحة  
DEPARTMENT OF CULTURE  
AND TOURISM



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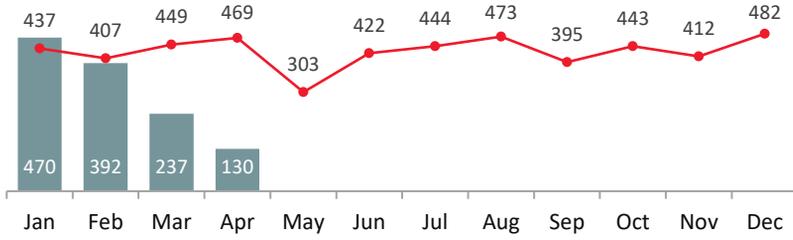
# OVERALL PERFORMANCE

## APRIL 2020



### HOTEL GUESTS (000)

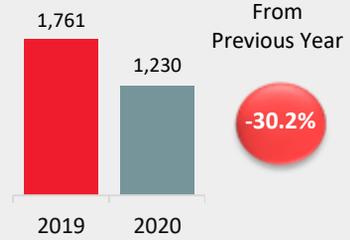
■ 2019 ■ 2020



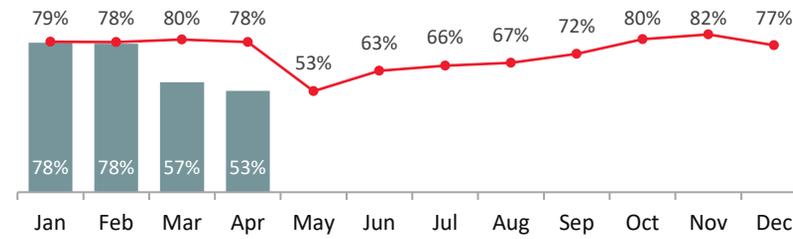
% Change (Apr 2020)

-72.3%

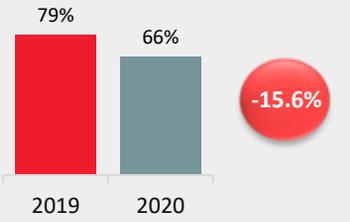
### YTD (JAN- APR)



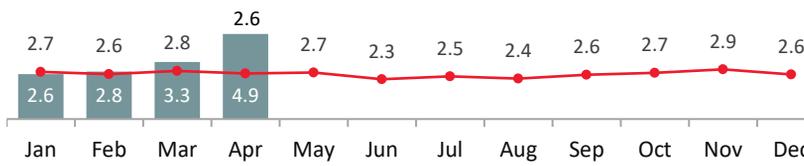
### OCCUPANCY RATE



-32.5%



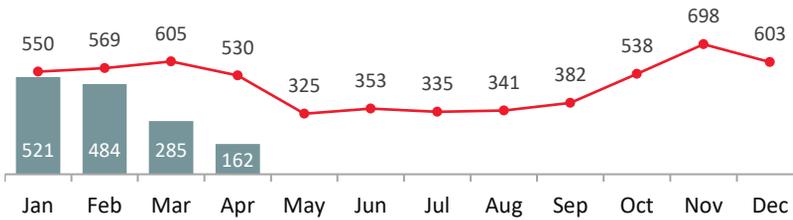
### AVERAGE LENGTH OF STAY (ALOS-NIGHTS)



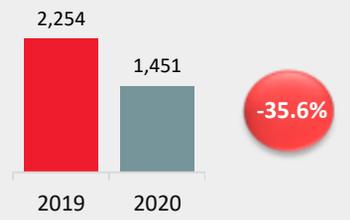
+86.7%



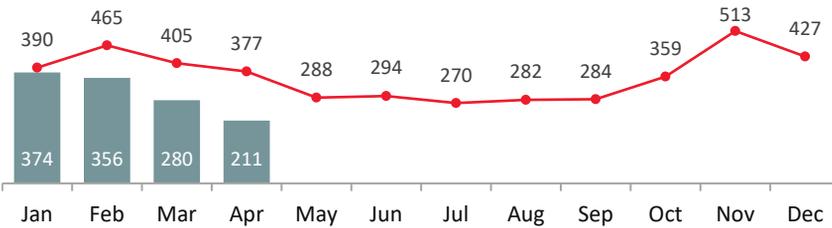
### HOTEL TOTAL REVENUE (MILLION AED)



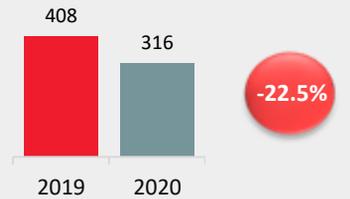
-69.5%



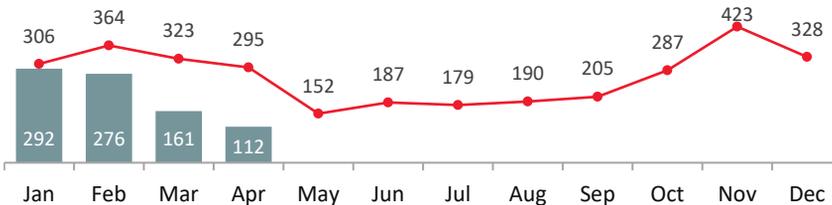
### AVERAGE ROOM RATE (AED)



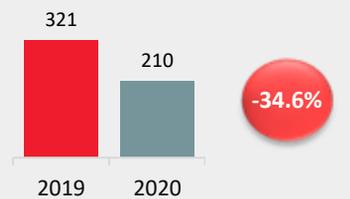
-44.0%



### REVENUE PER AVAILABLE ROOM (AED)



-62.2%



# HOTEL GUESTS BY NATIONALITY

APRIL 2020



## UAE VS. NON-UAE HOTEL GUESTS

130,029

1,229,771

TOTAL

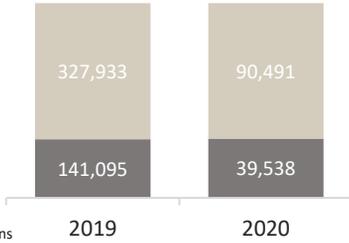
APR 2020

YTD (JAN- APR) 2020

TOTAL

-72.3%

From Previous Year



■ UAE ■ Non UAE

-72.4%

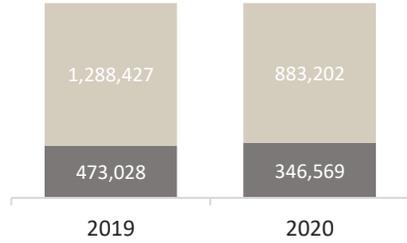
-72.0%

-31.5%

-26.7%

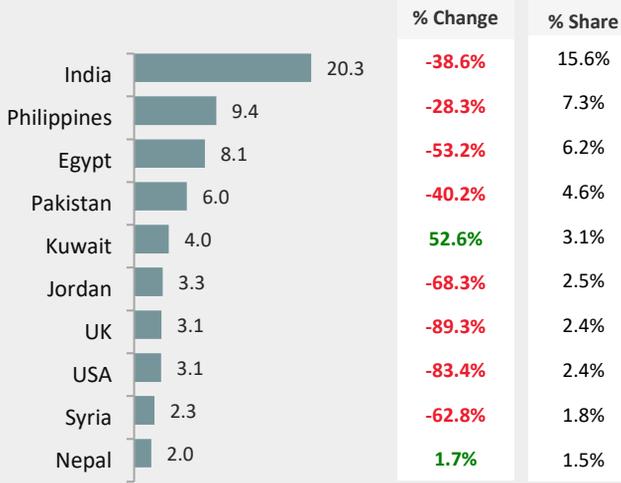
-30.2%

From Previous Year



\*UAE refers to UAE citizens

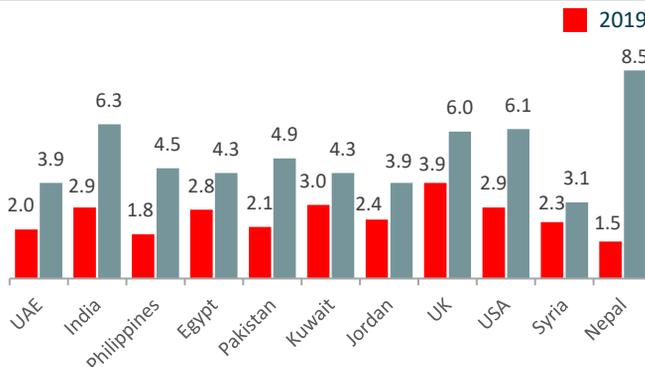
## TOP 10 NON-UAE NATIONALITIES (000s) – APR 2020



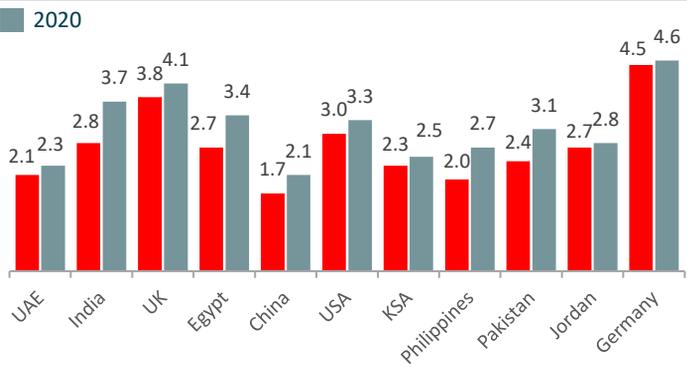
## TOP 10 NON-UAE NATIONALITIES (000s) YTD APR 2020



## ALOS (NIGHTS) – APR 2020



## ALOS (NIGHTS) – YTD APR 2020



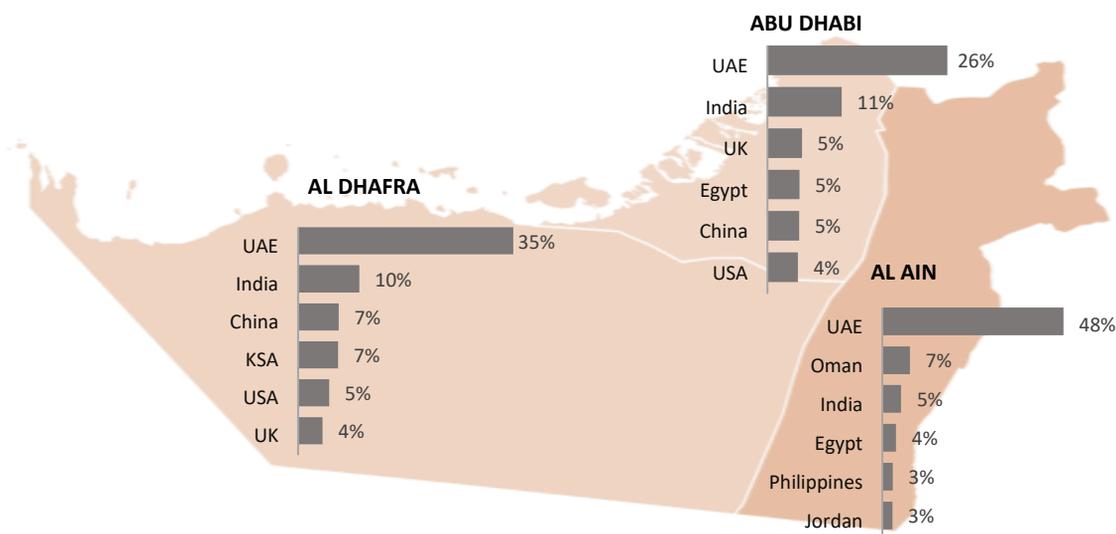
# PERFORMANCE BY REGION

## APRIL 2020

### REGIONAL PERFORMANCE – APR 2020

KEY INDICATORS	ABU DHABI			AL AIN			AL DHAFRA		
	Actual	% Change		Actual	% Change		Actual	% Change	
GUESTS	111,023	-73.0%	▼	11,222	-74.6%	▼	7,784	-45.8%	▼
OCCUPANCY RATE	53%	-34.0%	▼	44%	-36.1%	▼	67%	36.8%	▲
ALOS DAYS	5.2	90.8%	▲	3.3	72.1%	▲	3.2	47.7%	▲
REVENUES (M AED)	134.8	-71.9%	▼	6.2	-76.9%	▼	21.0	-10.4%	▼
ARR (AED)	202	-46.0%	▼	141	-49.7%	▼	489	-36.4%	▼
REVPAR (AED)	107	-64.4%	▼	62	-67.9%	▼	329	-12.9%	▼

### TOP NATIONALITIES ACROSS REGIONS – YTD APR 2020



### REGIONAL PERFORMANCE – YTD APR 2020

KEY INDICATORS	ABU DHABI			AL AIN			AL DHAFRA		
	Actual	% Change		Actual	% Change		Actual	% Change	
GUESTS	1,070,141	-30.2%	▼	118,720	-32.9%	▼	40,910	-21.5%	▼
OCCUPANCY RATE	67%	-16.6%	▼	56%	-18.6%	▼	64%	27.5%	▲
ALOS DAYS	3.2	13.3%	▲	2.0	2.2%	▲	2.7	20.4%	▲
REVENUES (M AED)	1,290.4	-36.7%	▼	68.0	-37.6%	▼	93.0	-13.3%	▼
ARR (AED)	311	-23.5%	▼	236	-19.0%	▼	628	-23.7%	▼
REVPAR (AED)	209	-36.2%	▼	131	-34.1%	▼	401	-2.7%	▼

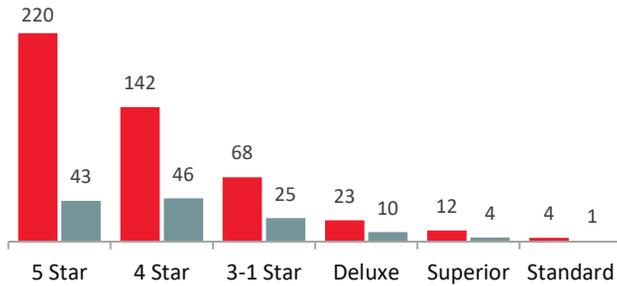
# PERFORMANCE BY STAR RATING

APRIL 2020

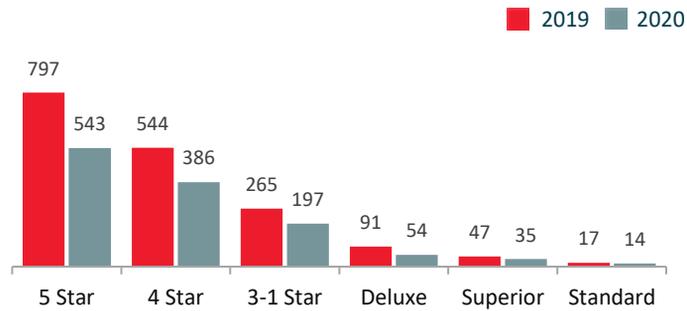


## PERFORMANCE ACROSS KEY INDICATORS

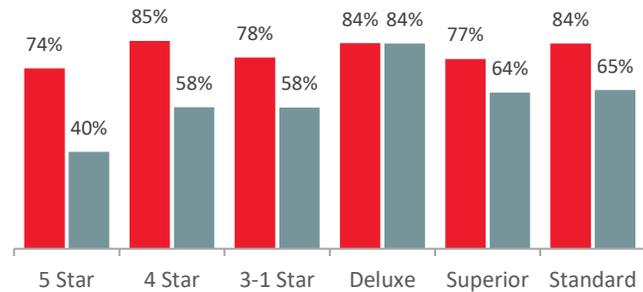
### HOTEL GUESTS – APR 2020



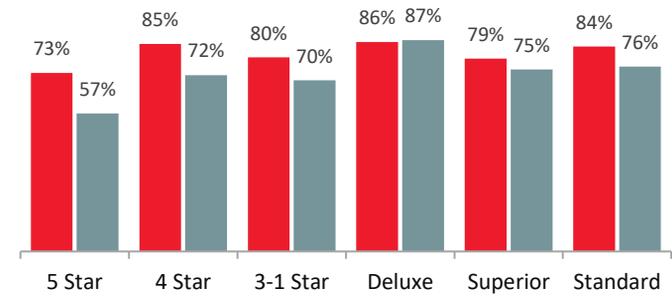
### HOTEL GUESTS – YTD APR 2020



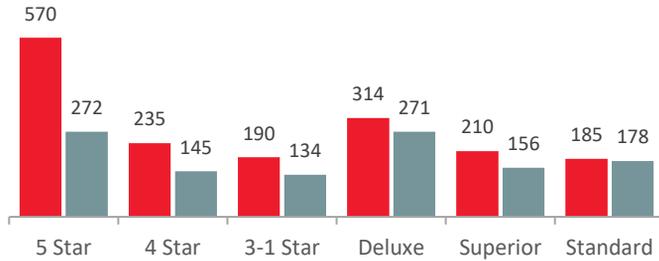
### HOTEL OCCUPANCY – APR 2020



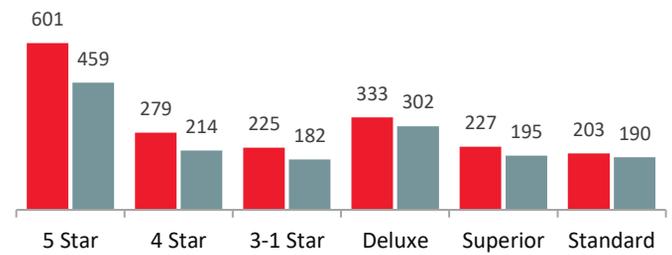
### HOTEL OCCUPANCY – YTD APR 2020



### HOTEL ARR (AED) – APR 2020



### HOTEL ARR (AED) – YTD APR 2020



## TOP NATIONALITIES – YTD APR 2020



# YAS ISLAND PERFORMANCE

## APRIL 2020

### HOTEL SUPPLY



7

HOTELS



2,259

ROOMS



### OVERALL PERFORMANCE

KEY INDICATORS	APR 2020		YTD APR 2020	
	Actual	% Change	Actual	% Change
GUESTS	1,927	-95.0% ▼	76,165	-44.1% ▼
OCCUPANCY RATE	27%	-69.1% ▼	55%	-38.2% ▼
ALOS NIGHTS	11.6	344.6% ▲	3.0	7.5% ▲
REVENUES (M AED)	9.4	-71.7% ▼	76.2	-49.8% ▼
ARR (AED)	80	-75.9% ▼	282	-24.2% ▼
REVPAR (AED)	21	-92.6% ▼	155	-53.2% ▼

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

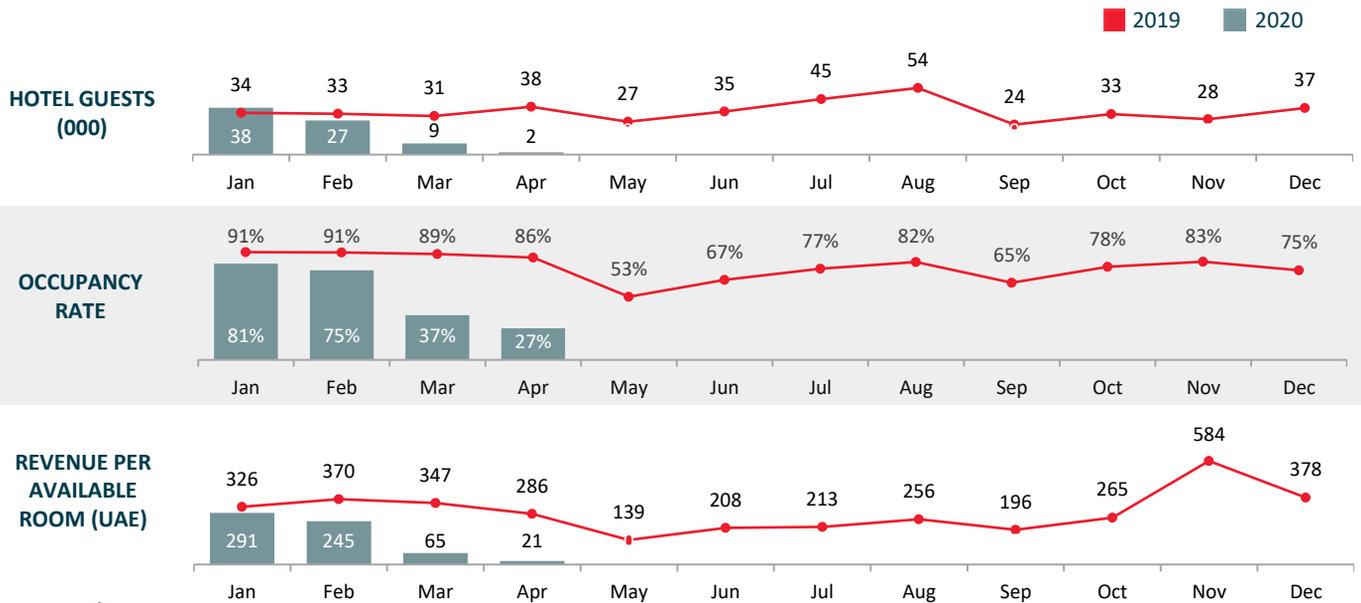
### TOP NATIONALITIES (000s) – APR 2020

Nationality	000s	% Change	% Share
UAE	0.92	-91.9%	47.7%
India	0.34	-85.5%	17.7%
Philippines	0.08	-92.1%	4.0%
Pakistan	0.07	-87.6%	3.7%
Nepal	0.06	-1.6%	3.1%
Morocco	0.05	-40.5%	2.4%
USA	0.05	-96.9%	2.4%
UK	0.03	-99.3%	1.7%
Sri Lanka	0.03	-64.7%	1.6%
Bangladesh	0.03	92.3%	1.3%
South Africa	0.02	-95.8%	1.2%

### TOP NATIONALITIES (000s) – YTD APR 2020

Nationality	000s	% Change	% Share
UAE	17.6	-46.5%	23.1%
India	10.7	-18.0%	14.0%
UK	6.1	-53.0%	8.0%
KSA	5.8	1.7%	7.6%
China	4.0	-63.9%	5.3%
USA	3.0	-45.5%	3.9%
Egypt	1.9	-31.0%	2.5%
France	1.6	-28.7%	2.1%
Philippines	1.4	-54.0%	1.9%
Kuwait	1.3	-48.6%	1.7%
South Africa	1.2	-40.4%	1.6%

### MONTHLY TRENDS



# SAADIYAT & NICHE AREAS PERFORMANCE

## APRIL 2020

### HOTEL SUPPLY



6

HOTELS



1,755

ROOMS



### OVERALL PERFORMANCE

KEY INDICATORS	APR 2020		YTD APR 2020	
	Actual	% Change	Actual	% Change
GUESTS	1,368	-91.7% ▼	34,703	-37.8% ▼
OCCUPANCY RATE	7%	-91.6% ▼	42%	-40.6% ▼
ALOS NIGHTS	3.6	-27.2% ▼	4.4	-4.6% ▼
REVENUES (M AED)	7.7	-90.7% ▼	167.0	-40.5% ▼
ARR (AED)	1,587	29.0%* ▲	973	-17.5% ▼
REVPAR (AED)	111	-89.2% ▼	406	-51.0% ▼

\*Increase in ARR can be attributed to high demand for villas in some of the Saadiyat hotels

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

### TOP NATIONALITIES (000s) – APR 2020

Nationality	Count (000s)	% Change	% Share
UAE	0.94	-70.9%	68.9%
UK	0.06	-97.3%	4.5%
Kazakhstan	0.04	-89.2%	2.7%
Russia	0.03	-98.1%	1.9%
Kuwait	0.03	-79.8%	1.9%
Italy	0.02	-97.6%	1.7%
Lebanon	0.02	-88.8%	1.5%
USA	0.02	-94.8%	1.5%
Netherlands	0.02	-83.3%	1.3%
Germany	0.02	-99.3%	1.2%
Jordan	0.02	-90.5%	1.1%

### TOP NATIONALITIES (000s) – YTD APR 2020

Nationality	Count (000s)	% Change	% Share
UAE	8.0	-24.4%	23.0%
UK	4.1	-40.7%	11.8%
Russia	3.5	-22.2%	10.0%
Germany	3.4	-53.7%	9.8%
France	1.7	-27.1%	4.8%
KSA	1.1	-14.4%	3.3%
USA	1.0	-44.6%	3.0%
Switzerland	1.0	-49.5%	2.8%
Italy	1.0	-56.6%	2.8%
Kazakhstan	0.9	-53.6%	2.5%
India	0.7	-56.0%	2.1%

### MONTHLY TRENDS



# ADNEC PERFORMANCE

## APRIL 2020

### HOTEL SUPPLY



6

HOTELS



1,827

ROOMS

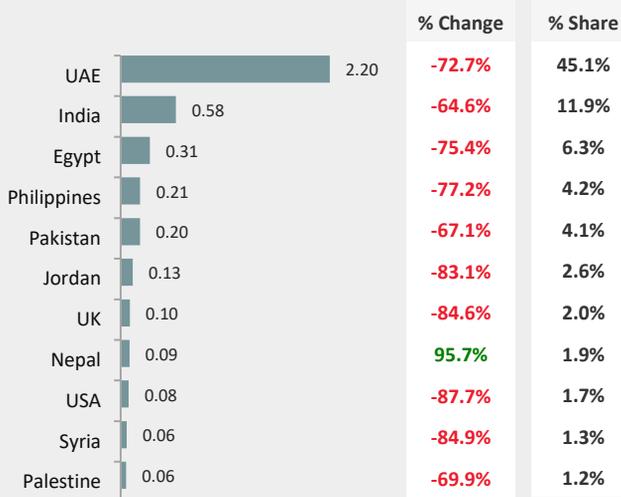


### OVERALL PERFORMANCE

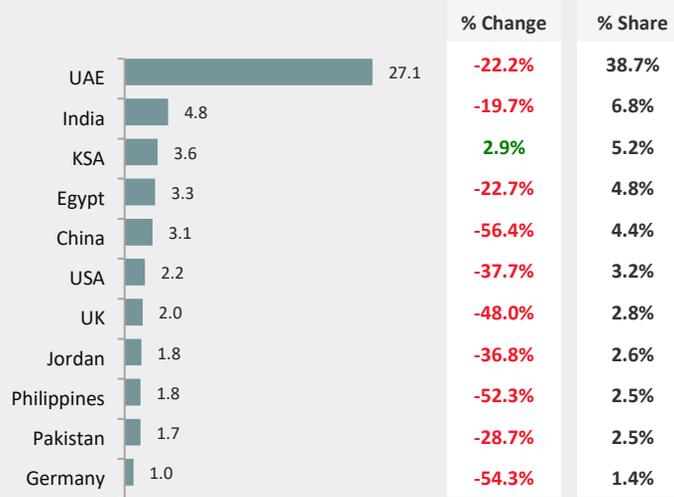
KEY INDICATORS	APR 2020		YTD APR 2020	
	Actual	% Change	Actual	% Change
GUESTS	4,868	-80.0% ▼	69,981	-33.1% ▼
OCCUPANCY RATE	57%	-37.2% ▼	73%	-17.3% ▼
ALOS NIGHTS	8.3	154.8% ▲	3.6	21.1% ▲
REVENUES (M AED)	7.7	-55.7% ▼	52.6	-36.0% ▼
ARR (AED)	195	-16.0% ▼	238	-22.9% ▼
REVPAR (AED)	112	-47.3% ▼	175	-36.2% ▼

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) – APR 2020



### TOP NATIONALITIES (000s) – YTD APR 2020



### MONTHLY TRENDS



# ABU DHABI ISLAND PERFORMANCE\*

## APRIL 2020

### HOTEL SUPPLY



**118**  
HOTELS



**23,270**  
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	4,657 ROOMS

### OVERALL PERFORMANCE

KEY INDICATORS	APR 2020		YTD APR 2020	
	Actual	% Change	Actual	% Change
GUESTS	102,860	-69.0% ▼	889,292	-28.0% ▼
OCCUPANCY RATE	58%	-25.7% ▼	70%	-12.6% ▼
ALOS NIGHTS	5.0	91.2% ▲	3.1	14.8% ▲
REVENUES (M AED)	110.0	-68.2% ▼	994.6	-34.7% ▼
ARR (AED)	197	-39.5% ▼	290	-21.4% ▼
REVPAR (AED)	115	-55.1% ▼	203	-31.3% ▼

### TOP NATIONALITIES (000s) – APR 2020

Nationality	000s	% Change	% Share
UAE	26.8	-71.4%	26.0%
India	17.4	-31.4%	16.9%
Philippines	8.0	-19.4%	7.8%
Egypt	6.9	-46.4%	6.7%
Pakistan	5.2	-31.0%	5.1%
Kuwait	3.9	133.6%	3.8%
Jordan	2.6	-65.2%	2.6%
UK	2.6	-86.8%	2.5%
USA	2.5	-82.6%	2.5%
Syria	1.7	-58.3%	1.7%
Nepal	1.7	2.8%	1.7%

### TOP NATIONALITIES (000s) – YTD APR 2020

Nationality	000s	% Change	% Share
UAE	222.7	-25.4%	25.0%
India	97.3	0.4%	10.9%
Egypt	43.1	-11.4%	4.9%
China	41.2	-67.8%	4.6%
UK	40.5	-40.1%	4.6%
USA	40.4	-31.4%	4.5%
Philippines	32.5	-10.0%	3.7%
KSA	28.3	-10.4%	3.2%
Pakistan	24.1	-15.3%	2.7%
Jordan	22.5	-24.0%	2.5%
Germany	20.9	-43.4%	2.3%

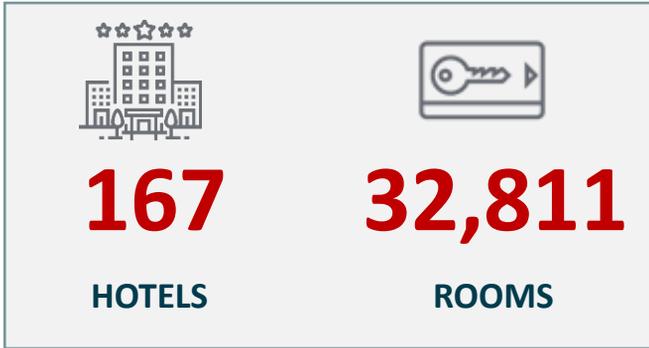
### MONTHLY TRENDS



# HOTEL SUPPLY

APRIL 2020

## HOTEL SUPPLY AS OF APRIL 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 5,453 ROOMS

**Quarantine Hotels:** As per government directive and precautionary measure against COVID-19, around 47 properties across the Abu Dhabi emirate were used at some point for quarantine purposes in April.

## 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

#### Disclaimer:

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