

# ABU DHABI

## HOTEL PERFORMANCE REPORT FEBRUARY 2021



دائرة الثقافة والسياحة  
DEPARTMENT OF CULTURE  
AND TOURISM



# TABLE OF CONTENTS



**OVERALL PERFORMANCE**

**PAGE 3**



**HOTEL GUESTS BY NATIONALITY**

**PAGE 4**



**PERFORMANCE BY REGION**

**PAGE 5**



**PERFORMANCE BY STAR RATING**

**PAGE 6**



**PERFORMANCE BY ABU DHABI ZONES**

**PAGE 9**



**OVERALL HOTEL SUPPLY**

**PAGE 15**



**GLOSSARY**

**PAGE 16**

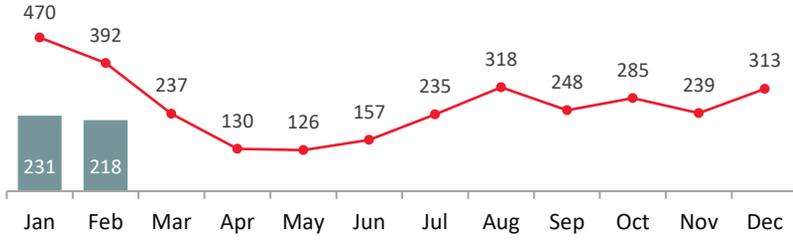
# OVERALL PERFORMANCE

## FEBRUARY 2021



### HOTEL GUESTS (000)

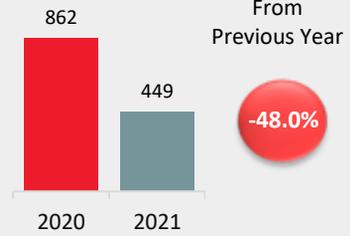
■ 2020 ■ 2021



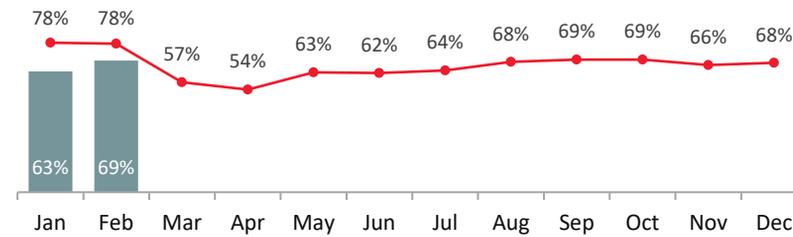
% Change  
(Feb 2021)

-44.5%

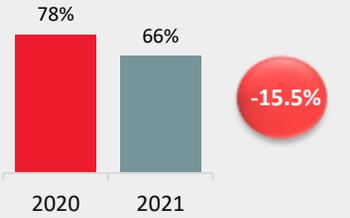
### YTD (JAN- FEB)



### OCCUPANCY RATE



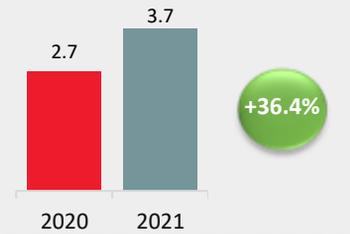
-11.5%



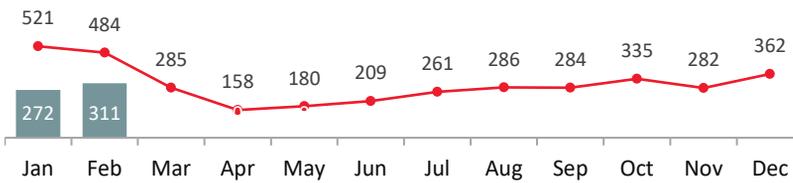
### AVERAGE LENGTH OF STAY (ALOS-NIGHTS)



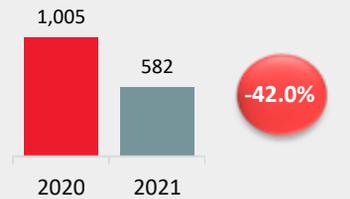
+35.4%



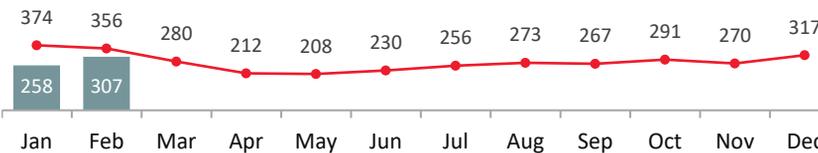
### HOTEL TOTAL REVENUE (MILLION AED)



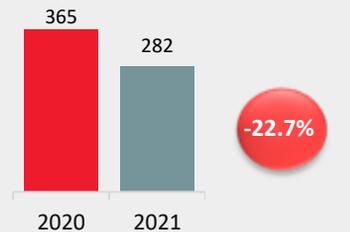
-35.8%



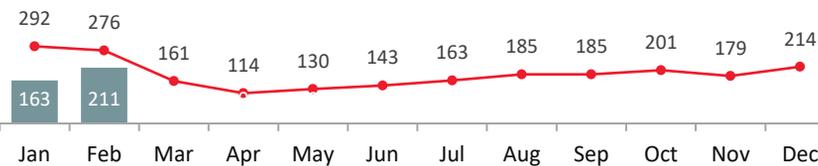
### AVERAGE ROOM RATE (AED)



-13.6%



### REVENUE PER AVAILABLE ROOM (AED)



-23.6%



# HOTEL GUESTS BY NATIONALITY

FEBRUARY 2021



## UAE VS. NON-UAE HOTEL GUESTS

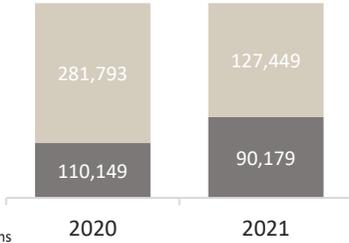
**217,628**

TOTAL

FEB 2021

■ UAE ■ Non UAE

**-44.5%**  
From Previous Year



**-54.8%**

**-18.1%**

\*UAE refers to UAE citizens

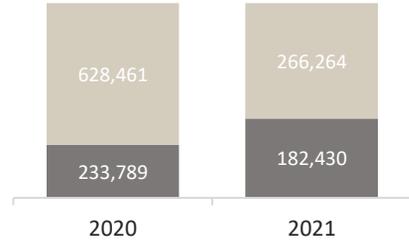
**448,694**

YTD (JAN- FEB) 2021

TOTAL

**-57.6%**

**-22.0%**

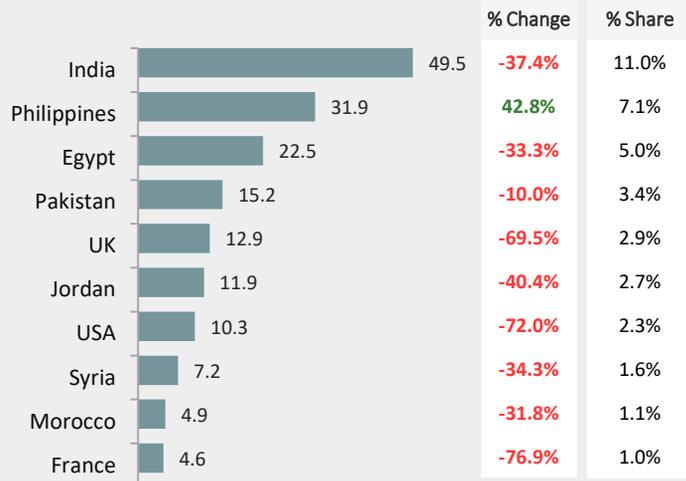


**-48.0%**  
From Previous Year

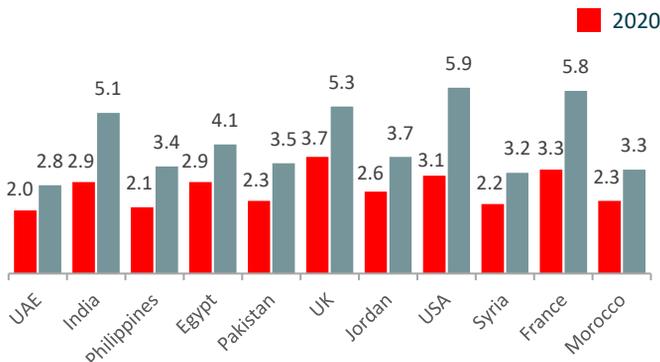
## TOP 10 NON-UAE NATIONALITIES (000s) – FEB 2021



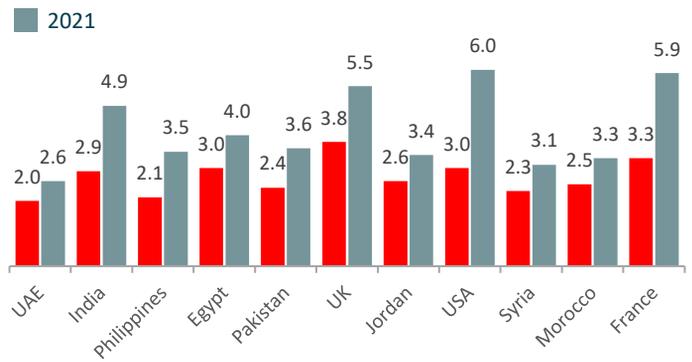
## TOP 10 NON-UAE NATIONALITIES (000s) YTD FEB 2021



## ALOS (NIGHTS) – FEB 2021



## ALOS (NIGHTS) – YTD FEB 2021



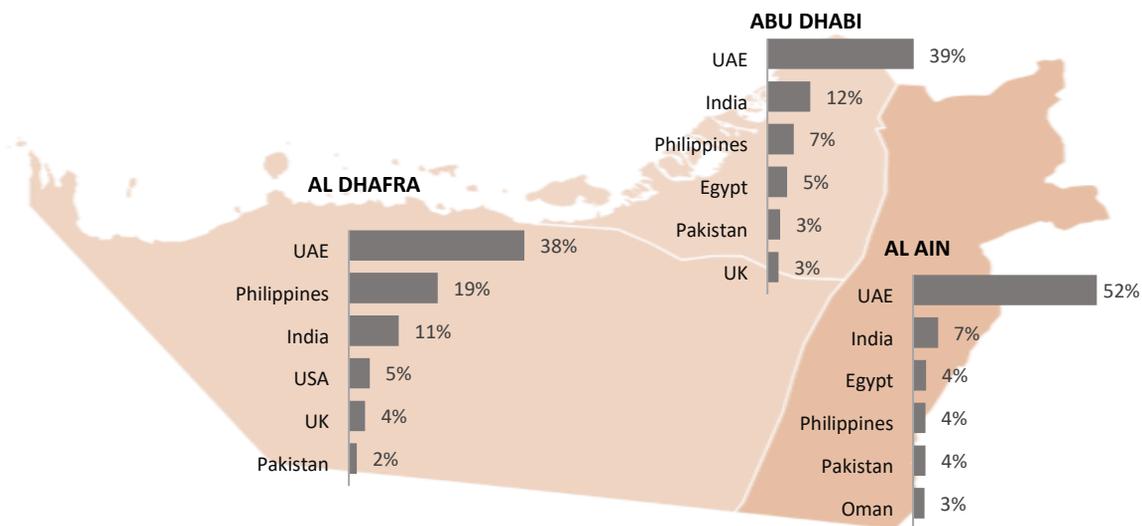
# PERFORMANCE BY REGION

FEBRUARY 2021

## REGIONAL PERFORMANCE – FEB 2021

KEY INDICATORS	ABU DHABI			AL AIN			AL DHAFRA		
	Actual	% Change		Actual	% Change		Actual	% Change	
GUESTS	186,418	-45.2%	▼	23,142	-43.5%	▼	8,068	-25.8%	▼
OCCUPANCY RATE	69%	-12.3%	▼	70%	2.7%	▲	58%	-10.1%	▼
ALOS DAYS	3.8	33.1%	▲	3.0	63.1%	▲	3.5	46.9%	▲
REVENUES (M AED)	267.7	-38.5%	▼	20.4	-14.6%	▼	22.5	-9.3%	▼
ARR (AED)	298	-15.4%	▼	275	4.1%	▲	604	-18.6%	▼
REVPAR (AED)	206	-25.8%	▼	193	6.9%	▲	349	-26.8%	▼

## TOP NATIONALITIES ACROSS REGIONS – YTD FEB 2021



## REGIONAL PERFORMANCE – YTD FEB 2021

KEY INDICATORS	ABU DHABI			AL AIN			AL DHAFRA		
	Actual	% Change		Actual	% Change		Actual	% Change	
GUESTS	383,089	-49.1%	▼	49,314	-42.1%	▼	16,291	-34.2%	▼
OCCUPANCY RATE	66%	-16.3%	▼	68%	0.2%	▲	51%	-17.4%	▼
ALOS DAYS	3.8	35.1%	▲	2.9	58.2%	▲	3.2	48.2%	▲
REVENUES (M AED)	505.1	-44.3%	▼	39.7	-18.8%	▼	37.6	-23.7%	▼
ARR (AED)	274	-24.0%	▼	261	-3.2%	▼	545	-30.6%	▼
REVPAR (AED)	182	-36.4%	▼	178	-3.0%	▼	276	-42.7%	▼

# PERFORMANCE BY STAR RATING

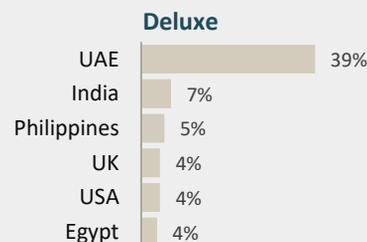
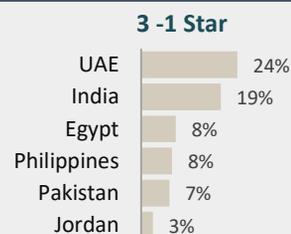
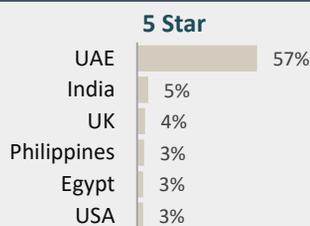
FEBRUARY 2021



## PERFORMANCE ACROSS KEY INDICATORS\* - FEB 2021

KEY INDICATORS	5 Star		4 Star		3-1 Star		Hotel Apts.	
	Actual	% Change	Actual	% Change	Actual	% Change	Actual	% Change
GUESTS	82,401	-54.6%	75,007	-37.6%	38,189	-36.3%	22,031	-26.8%
OCCUPANCY RATE	61%	-14.2%	74%	-10.3%	76%	-6.0%	78%	-10.2%
ALOS DAYS	4.0	+50.2%	2.6	+19.3%	3.3	+44.9%	7.2	+11.2%
REVENUES (M AED)	199.6	-40.2%	58.5	-24.6%	23.3	-27.9%	29.2	-26.7%
ARR (AED)	420	-17.2%	230	-6.4%	195	-3.9%	248	-8.2%
REVPAR (AED)	256	-28.9%	169	-16.1%	149	-9.6%	194	-17.6%

## TOP NATIONALITIES – YTD FEB 2021



## PERFORMANCE ACROSS KEY INDICATORS\* - YTD FEB 2021

KEY INDICATORS	5 Star		4 Star		3-1 Star		Hotel Apts.	
	Actual	% Change	Actual	% Change	Actual	% Change	Actual	% Change
GUESTS	165,866	-59.1%	158,417	-39.1%	77,143	-41.4%	47,268	-27.2%
OCCUPANCY RATE	56%	-20.8%	73%	-12.2%	73%	-9.7%	77%	-11.7%
ALOS DAYS	3.8	+50.7%	2.6	+21.7%	3.2	+42.2%	7.1	+11.5%
REVENUES (M AED)	369.8	-46.5%	112.9	-30.6%	41.9	-36.9%	57.9	-31.1%
ARR (AED)	393	-25.4%	211	-15.4%	168	-17.4%	236	-14.1%
REVPAR (AED)	220	-40.9%	154	-25.7%	123	-25.4%	182	-24.2%

\*Note: Jumeriah at Etihad towers was rebranded to Conrad Abu Dhabi Etihad Towers on Oct 1, 2020. The establishment's Jan & Feb 2021 performance includes combined performance for both Etihad towers and apartments under 5-star classification. This may be subject to change under certain circumstances

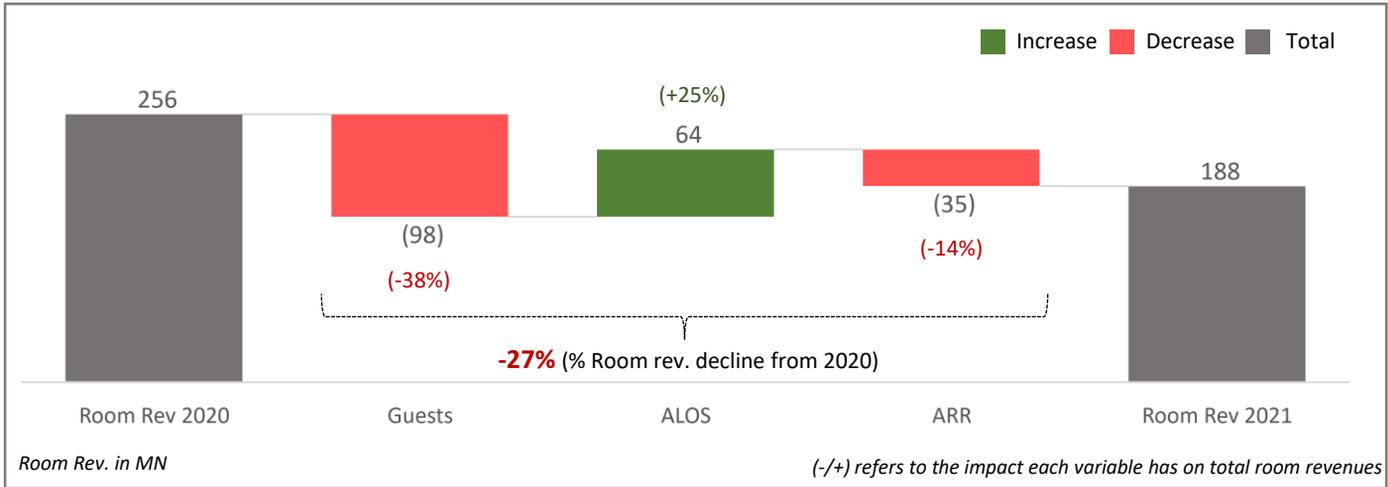
# PERFORMANCE BY STAR RATING

## FEBRUARY 2021 – ROOM REVENUE ATTRIBUTION

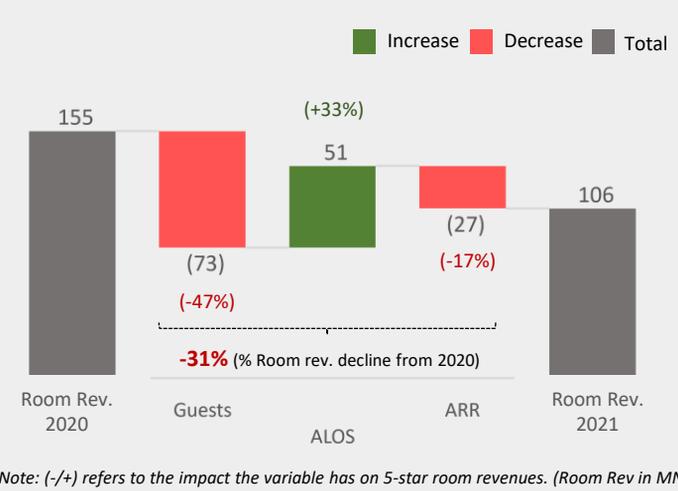


- In Feb, hotels in Abu Dhabi Emirate reported a double-digit drop (-27%) in room revenues compared to same period in 2020. The decline was primarily driven by drop in guest numbers and to a certain extent, due to the room rates. However, it was partially offset by increase in ALOS
- Compared to 2020, all hotel types recorded a decline in room revenues in Feb 2021, with 5-star hotels reporting the largest decline (-31%). While the decline across all hotel types was largely driven by drop in guest numbers, it was more evident with 5-star and 3-1 star type of hotels

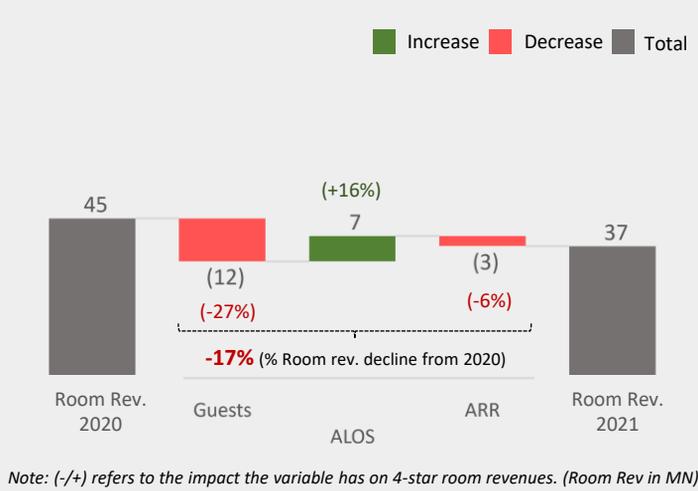
### ABU DHABI EMIRATE – FEB 2021



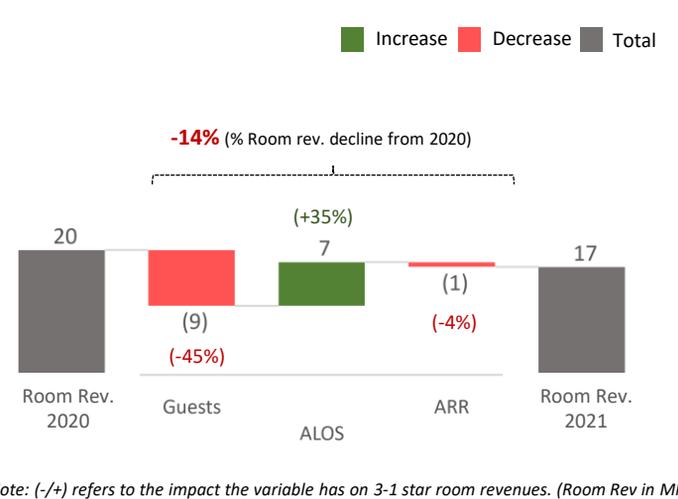
### 5-STAR HOTELS – FEB 2021



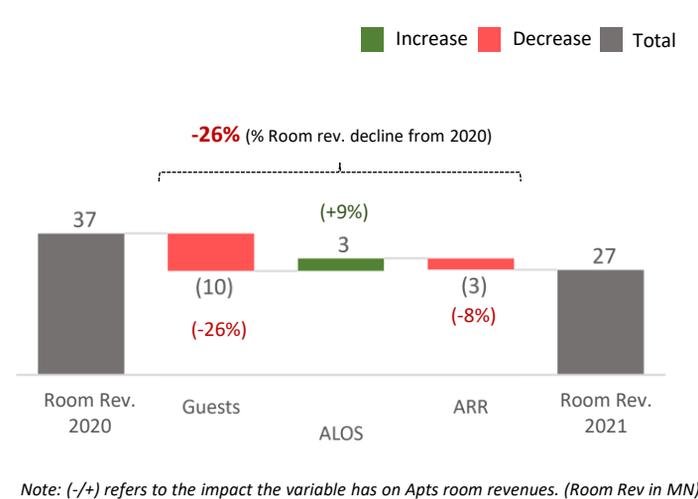
### 4-STAR HOTELS – FEB 2021



### 3-1 STAR HOTELS – FEB 2021



### HOTEL APARTMENTS – FEB 2021



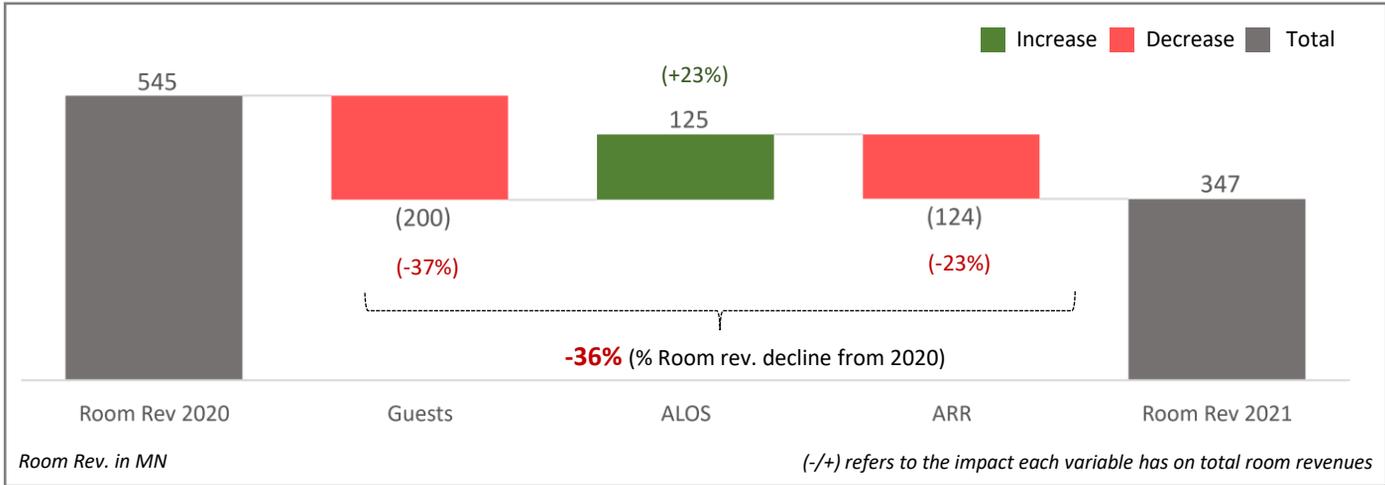
# PERFORMANCE BY STAR RATING

## YTD FEBRUARY 2021 – ROOM REVENUE ATTRIBUTION

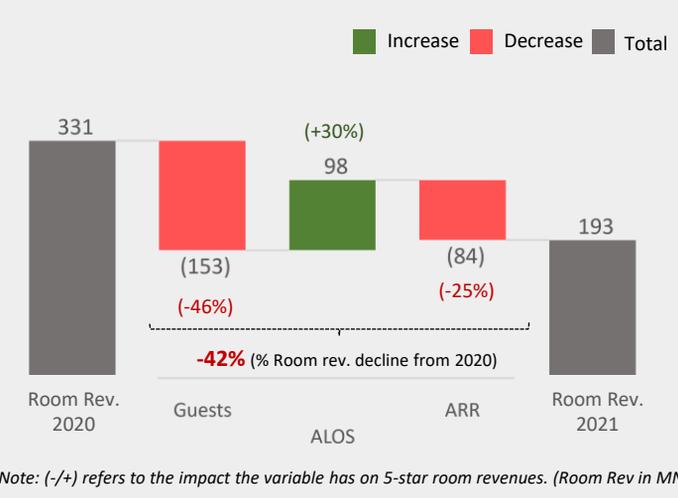


- Double-digit declines during the first two months of 2021 has impacted the total room revenues on YTD basis. YTD decline was primarily driven by drop in guest numbers as well as average room rates. However, it was partially offset by higher length of stay compared to 2020
- 5-star hotels continue to report the largest drop in room revenues (-42%). Decline across all hotel types continue to be largely driven by drop in guest numbers and to some extent, the average room rates

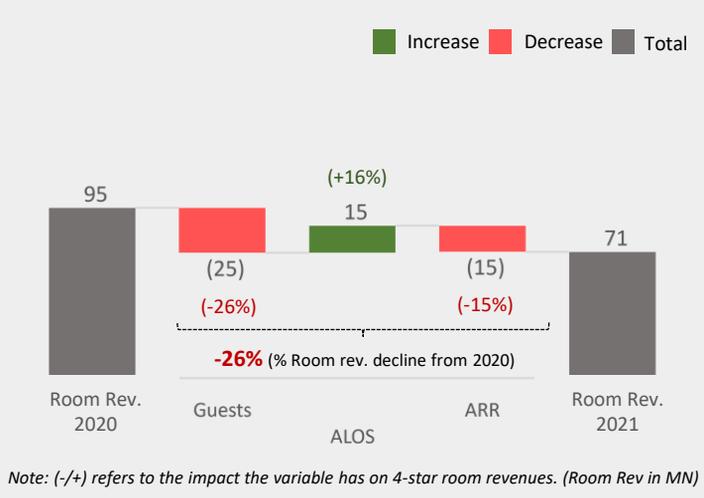
### ABU DHABI EMIRATE – YTD FEB 2021



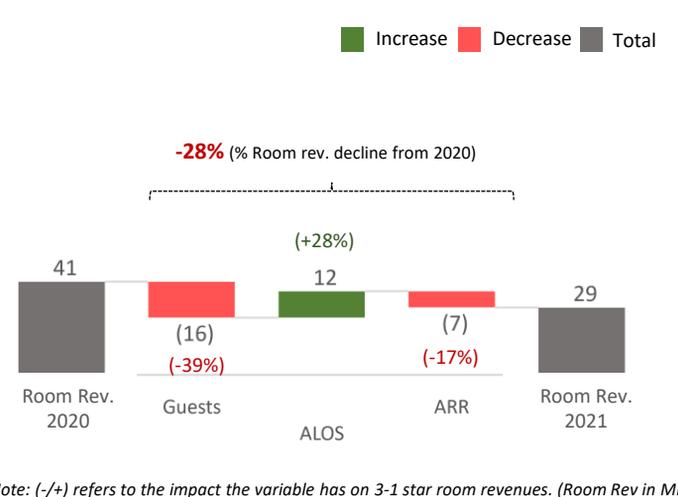
### 5-STAR HOTELS – YTD FEB 2021



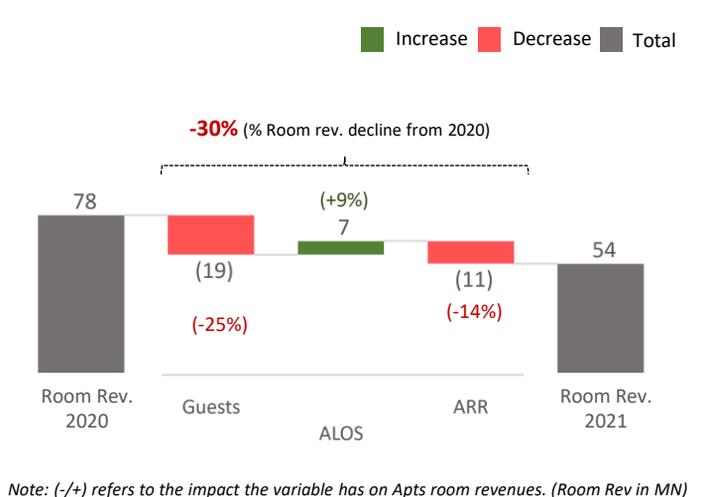
### 4-STAR HOTELS – YTD FEB 2021



### 3-1 STAR HOTELS – YTD FEB 2021



### HOTEL APARTMENTS – YTD FEB 2021



# YAS ISLAND PERFORMANCE

## FEBRUARY 2021

### HOTEL SUPPLY\*



8

HOTELS



2,804

ROOMS



STAR RATING	5 STAR	4 STAR	1-3 STAR	APTS
	2 HOTELS	3 HOTELS	2 HOTELS	1 HOTEL
	1,044 ROOMS	1,133 ROOMS	463 ROOMS	164 ROOMS

\*Hotel Supply as of Mar 1, 2021. Hilton Yas Bay opened its doors on Feb 18, 2021

### OVERALL PERFORMANCE

KEY INDICATORS	FEB 2021		YTD FEB 2021	
	Actual	% Change	Actual	% Change
GUESTS	15,306	-44.1% ▼	26,312	-59.7% ▼
OCCUPANCY RATE	54%	-28.9% ▼	53%	-33.0% ▼
ALOS NIGHTS	3.0	10.2% ▲	3.5	34.5% ▲
REVENUES (M AED)	16.1	-40.6% ▼	37.4	-37.1% ▼
ARR (AED)	302	-6.9% ▼	370	7.8% ▲
REVPAR (AED)	162	-33.8% ▼	194	-27.7% ▼

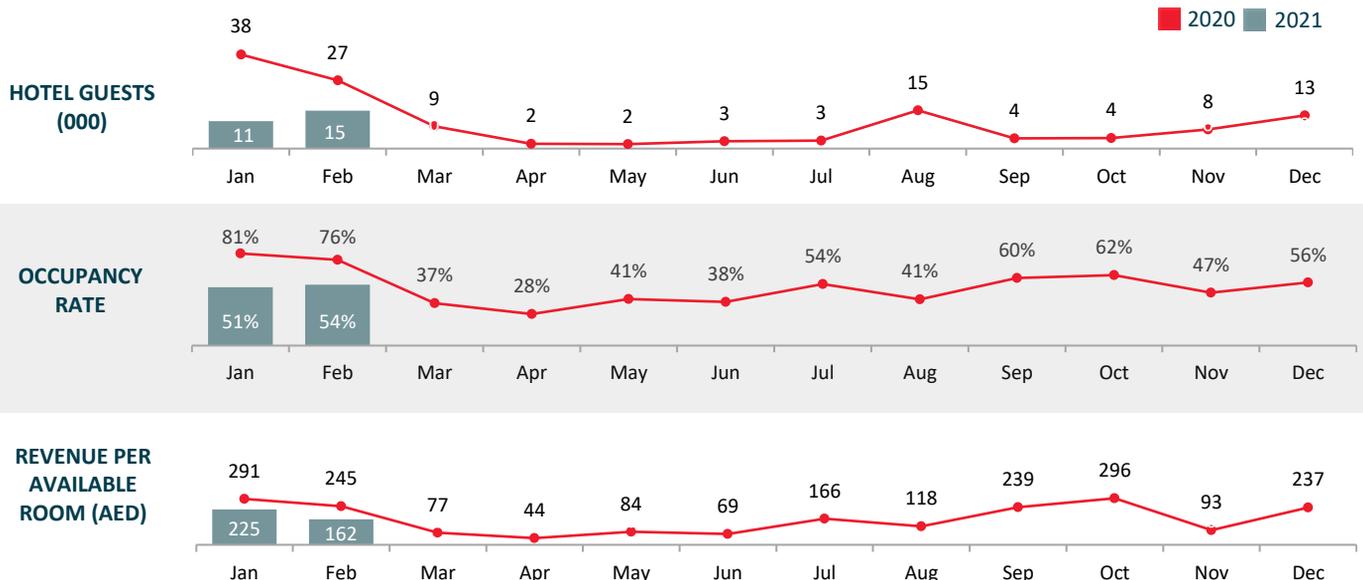
### TOP NATIONALITIES (000s) – FEB 2021

Nationality	Count (000s)	% Change	% Share
UAE	5.3	-14.6%	34.7%
UK	1.2	-58.9%	7.7%
India	1.2	-66.5%	7.7%
Philippines	0.8	32.9%	4.9%
Egypt	0.6	-43.4%	3.7%
Italy	0.6	7.6%	3.7%
USA	0.5	-57.9%	3.5%
Jordan	0.4	-15.8%	2.8%
Pakistan	0.4	1.1%	2.4%
France	0.3	-45.5%	2.2%
South Africa	0.3	-16.9%	2.2%

### TOP NATIONALITIES (000s) – YTD FEB 2021

Nationality	Count (000s)	% Change	% Share
UAE	8.8	-31.2%	33.4%
UK	2.2	-59.6%	8.4%
India	2.0	-79.1%	7.6%
Philippines	1.4	16.7%	5.4%
USA	1.2	-54.0%	4.5%
Egypt	0.9	-48.5%	3.5%
Pakistan	0.7	-11.9%	2.7%
Jordan	0.7	-30.8%	2.7%
Italy	0.6	-31.3%	2.4%
South Africa	0.5	-50.0%	2.0%
France	0.5	-65.4%	1.8%

### MONTHLY TRENDS



# SAADIYAT & NICHE AREAS PERFORMANCE

## FEBRUARY 2021

### HOTEL SUPPLY



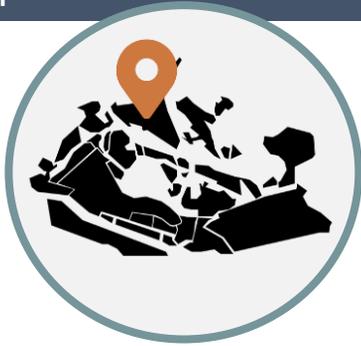
6

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

\*Hotel Supply as of Mar 1, 2021.

### OVERALL PERFORMANCE

KEY INDICATORS	FEB 2021		YTD FEB 2021	
	Actual	% Change	Actual	% Change
GUESTS	10,092	-26.6% ▼	16,762	-34.8% ▼
OCCUPANCY RATE	32%	-51.2% ▼	28%	-54.5% ▼
ALOS NIGHTS	2.3	-47.7% ▼	2.3	-47.4% ▼
REVENUES (M AED)	30.0	-51.0% ▼	54.8	-56.9% ▼
ARR (AED)	1,143	28.1% ▲	1,193	21.1% ▲
REVPAR (AED)	361	-37.5% ▼	330	-44.9% ▼

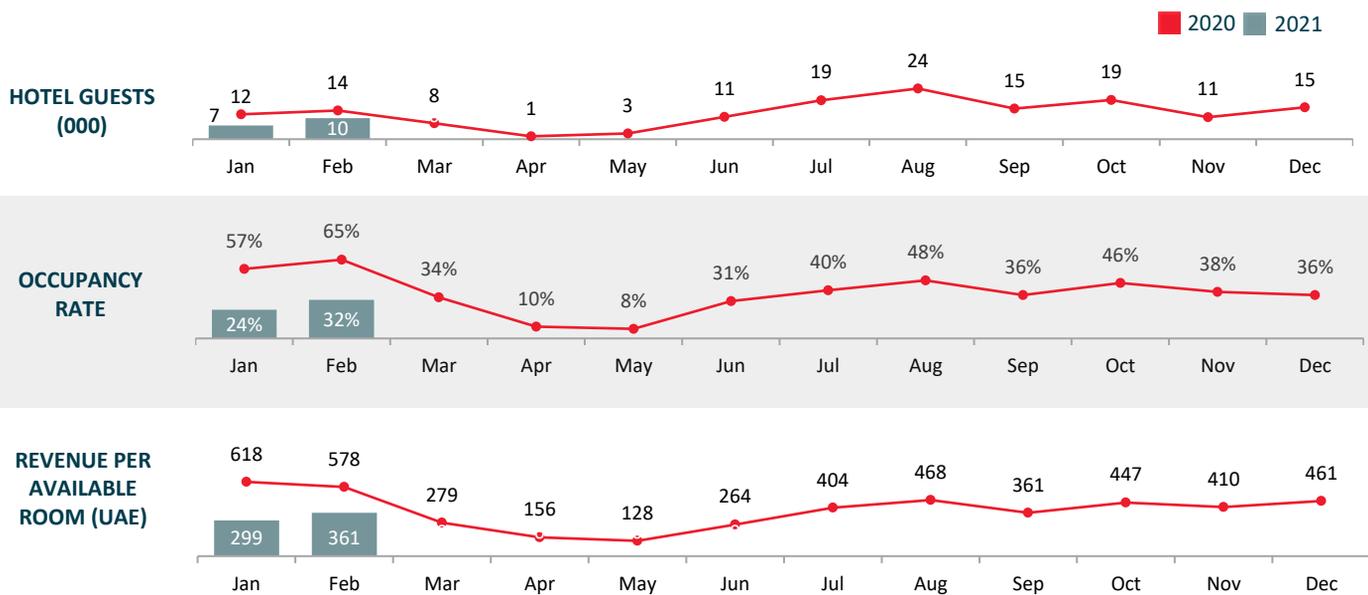
### TOP NATIONALITIES (000s) – FEB 2021

Nationality	000s	% Change	% Share
UAE	6.2	149.7%	61.3%
UK	0.7	-64.8%	7.4%
France	0.2	-73.7%	2.3%
India	0.2	-14.6%	2.2%
Russia	0.2	-79.5%	2.0%
USA	0.2	-68.8%	1.7%
Philippines	0.2	71.4%	1.5%
Lebanon	0.1	-19.5%	1.5%
Egypt	0.1	-35.6%	1.3%
Canada	0.1	-10.9%	1.2%
Australia	0.1	24.1%	1.1%

### TOP NATIONALITIES (000s) – YTD FEB 2021

Nationality	000s	% Change	% Share
UAE	10.5	123.9%	62.3%
UK	1.1	-65.7%	6.5%
India	0.4	-34.9%	2.2%
Philippines	0.3	65.1%	2.1%
France	0.3	-75.7%	2.0%
USA	0.3	-63.2%	1.9%
Russia	0.3	-87.9%	1.9%
Lebanon	0.2	-24.5%	1.3%
Egypt	0.2	-53.7%	1.2%
Canada	0.2	-15.3%	1.1%
Jordan	0.2	-28.3%	1.0%

### MONTHLY TRENDS



# ADNEC PERFORMANCE

## FEBRUARY 2021

### HOTEL SUPPLY\*



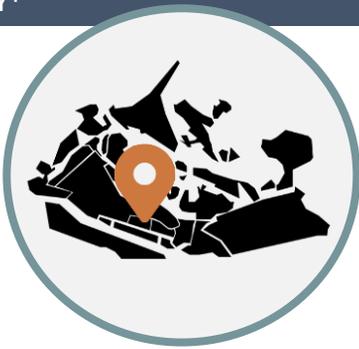
6

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

\*Hotel Supply as of Mar 1, 2021.

### OVERALL PERFORMANCE

KEY INDICATORS	FEB 2021		YTD FEB 2021	
	Actual	% Change	Actual	% Change
GUESTS	13,177	-35.9%	28,022	-45.5%
OCCUPANCY RATE	84%	-3.0%	78%	-10.3%
ALOS NIGHTS	5.1	51.2%	4.5	51.1%
REVENUES (M AED)	15.5	-14.5%	24.9	-30.0%
ARR (AED)	280	-3.4%	226	-17.3%
REVPAR (AED)	234	-6.4%	176	-25.8%

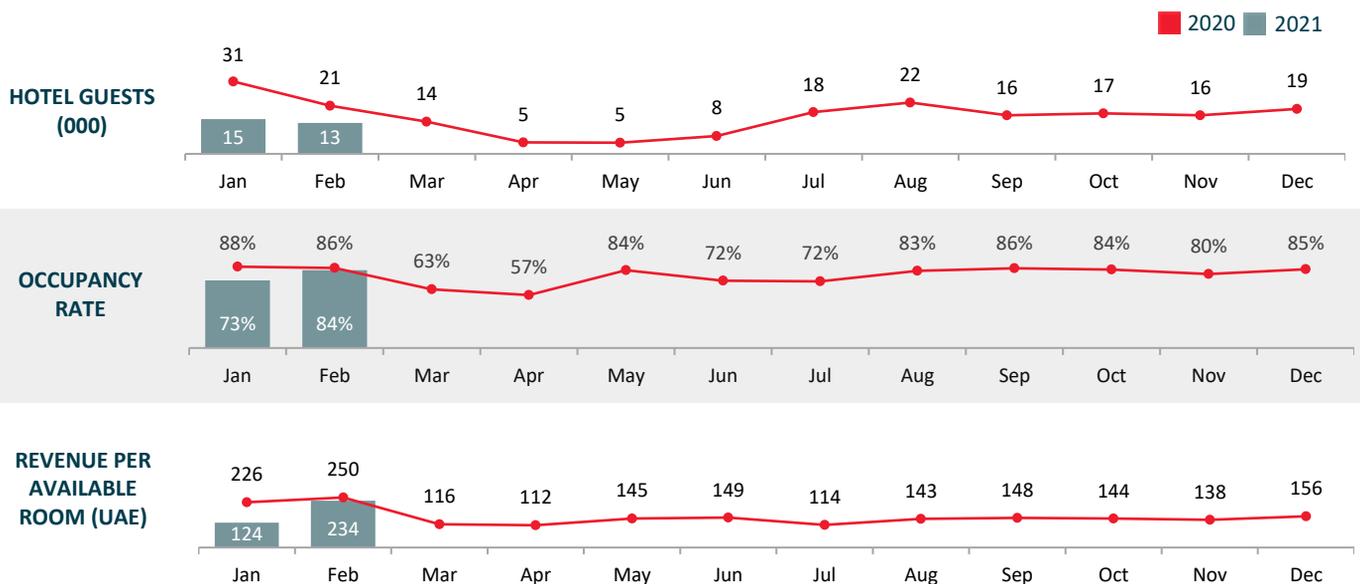
### TOP NATIONALITIES (000s) – FEB 2021

Nationality	000s	% Change	% Share
UAE	6.4	-17.7%	48.9%
India	1.1	-10.6%	8.7%
Egypt	0.6	-33.9%	4.6%
Jordan	0.4	-22.1%	3.1%
Pakistan	0.4	-41.8%	3.0%
USA	0.4	-60.2%	2.8%
Philippines	0.3	-32.3%	2.4%
UK	0.3	-56.8%	2.2%
Syria	0.2	4.8%	1.8%
Lebanon	0.2	-26.1%	1.3%
South Korea	0.2	-42.2%	1.3%

### TOP NATIONALITIES (000s) – YTD FEB 2021

Nationality	000s	% Change	% Share
UAE	14.6	-21.8%	52.0%
India	1.6	-52.1%	5.8%
Egypt	1.3	-39.7%	4.7%
Jordan	1.0	-25.0%	3.4%
Philippines	0.9	-22.0%	3.1%
Pakistan	0.8	-25.5%	2.8%
USA	0.7	-60.4%	2.4%
UK	0.6	-64.5%	2.0%
Syria	0.5	-24.9%	1.6%
South Korea	0.4	-26.7%	1.5%
Lebanon	0.4	-13.3%	1.4%

### MONTHLY TRENDS



# ABU DHABI ISLAND PERFORMANCE

## FEBRUARY 2021

### HOTEL SUPPLY\*



**115**

HOTELS



**22,961**

ROOMS



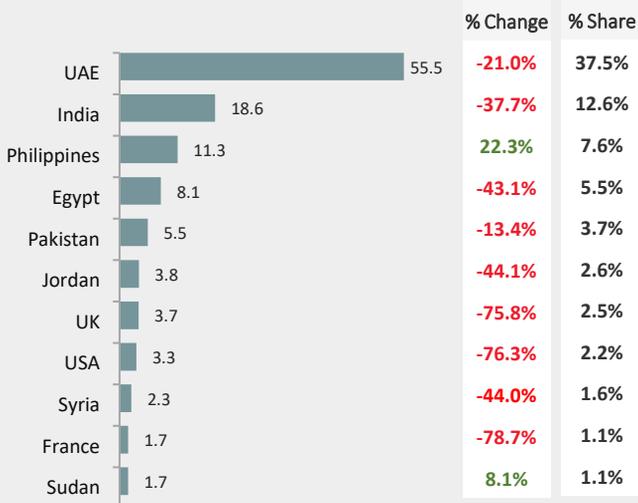
STAR RATING	5 STAR	4 STAR	1-3 STAR	APTS
	36 HOTELS	23 HOTELS	21 HOTELS	35 HOTELS
	11,335 ROOMS	4,795 ROOMS	2,426 ROOMS	4,405 ROOMS

\*Hotel Supply as of Mar 1, 2021. Vision Hotel Apts ceased its operations on Feb 28, 2021

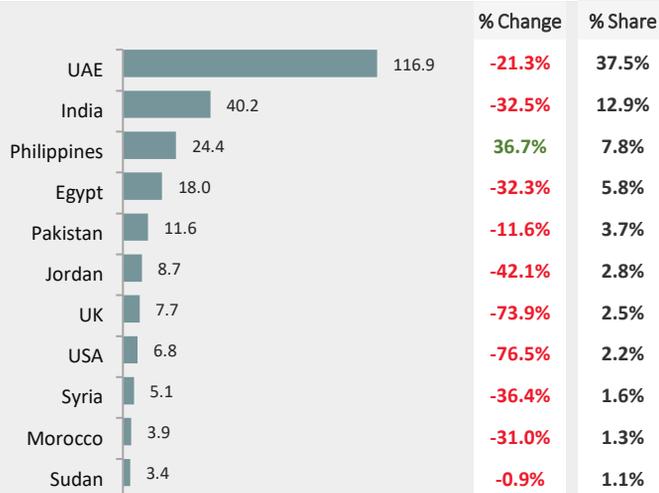
### OVERALL PERFORMANCE

KEY INDICATORS	FEB 2021		YTD FEB 2021	
	Actual	% Change	Actual	% Change
GUESTS	147,843	-46.9% ▼	311,993	-48.9% ▼
OCCUPANCY RATE	72%	-9.3% ▼	69%	-13.3% ▼
ALOS NIGHTS	3.9	40.5% ▲	3.8	39.6% ▲
REVENUES (M AED)	206.0	-37.3% ▼	388.0	-43.3% ▼
ARR (AED)	272	-16.7% ▼	246	-26.5% ▼
REVPAR (AED)	197	-24.4% ▼	171	-36.2% ▼

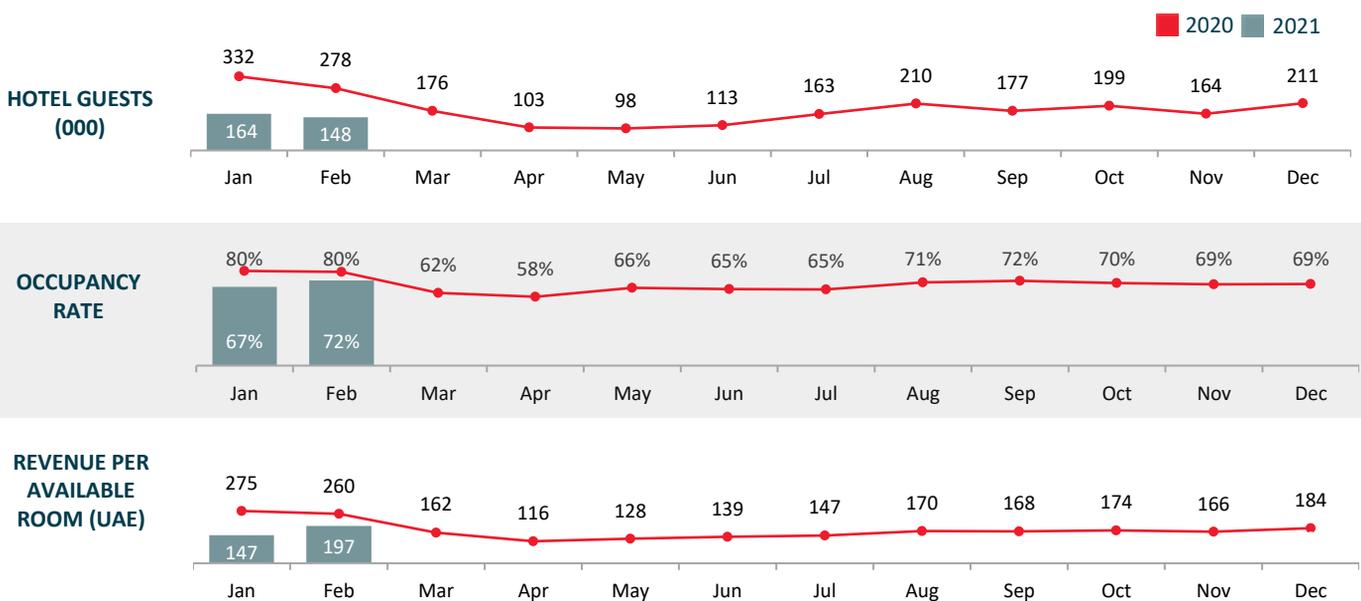
### TOP NATIONALITIES (000s) – FEB 2021



### TOP NATIONALITIES (000s) – YTD FEB 2021



### MONTHLY TRENDS



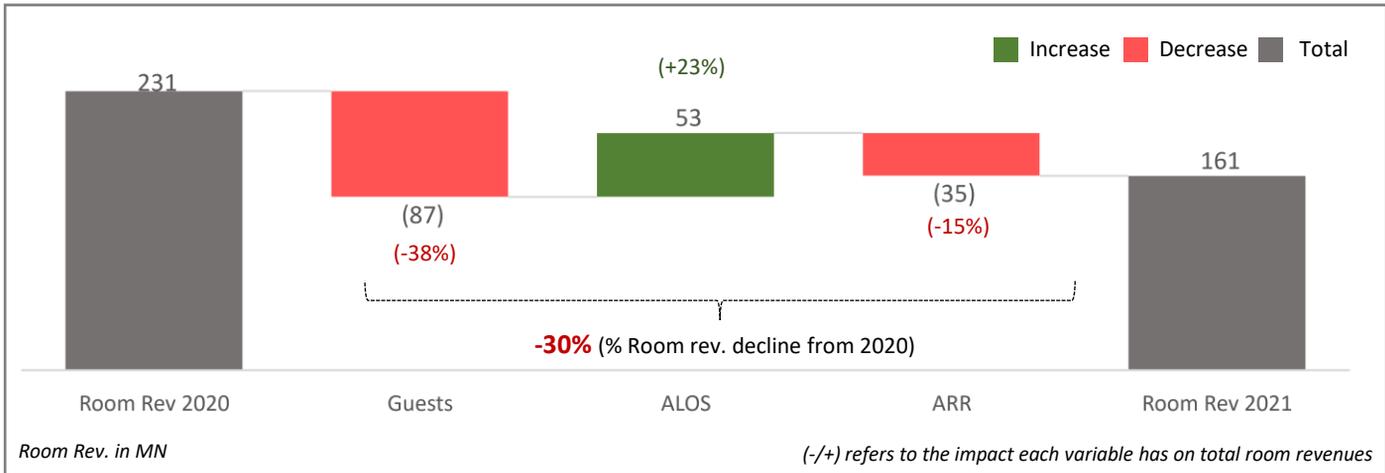
# PERFORMANCE BY ZONES

## FEBRUARY 2021 – ROOM REVENUE ATTRIBUTION

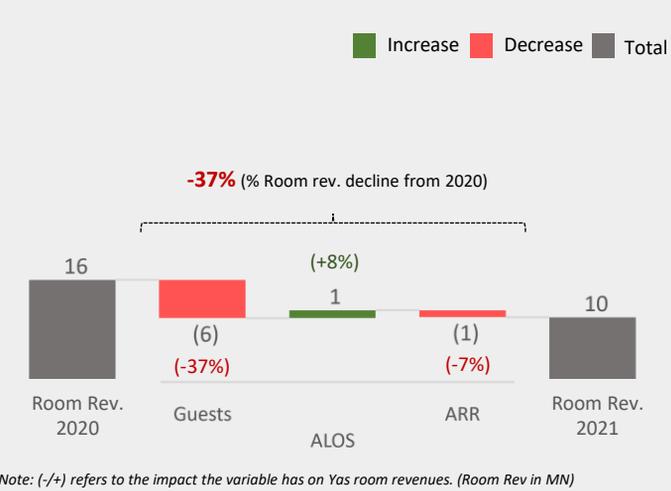


- In Feb, all Abu Dhabi zones reported a decline in room revenues compared to 2020, with Saadiyat Island recording the largest decline (-43%). Unlike other zones, where the decline is predominantly driven by drop in guest numbers, decline in Saadiyat was highly attributed to reduced length of stay. However, Saadiyat hotels have partially offset this with higher prices, with ARR increasing by more than 25% compared to 2020
- ADNEC reported the lowest decline in room revenues in Feb (-10%). This is attributed to strong performance during the IDEX event. Decline in room revenues in ADNEC was largely driven by drop in guest numbers. In Feb, its hotel guest impact was the largest amongst all other zones

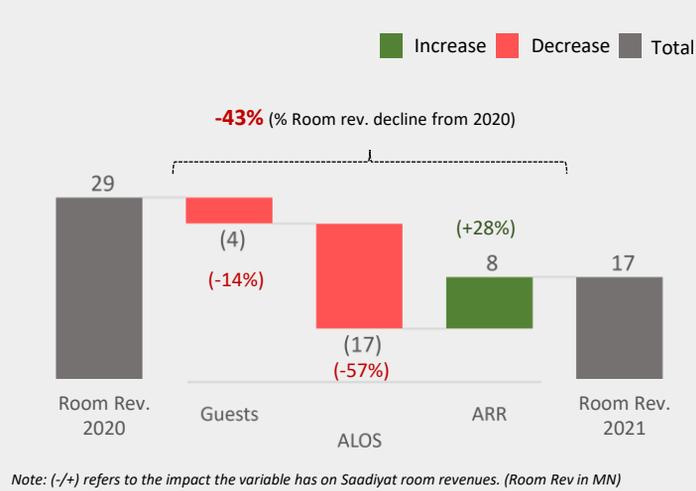
### ABU DHABI CITY – FEB 2021



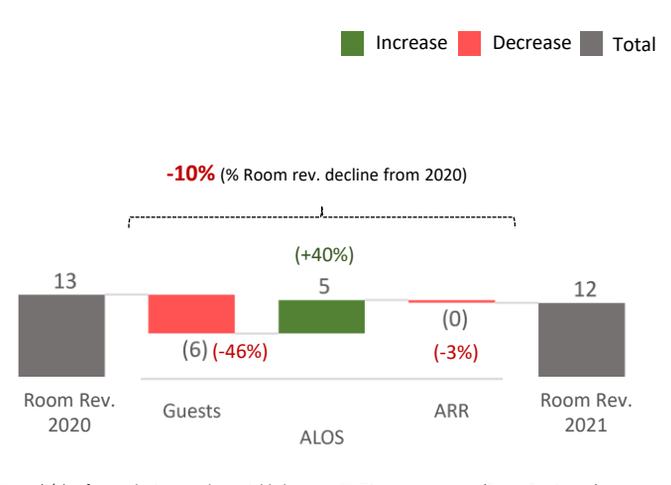
### YAS ISLAND – FEB 2021



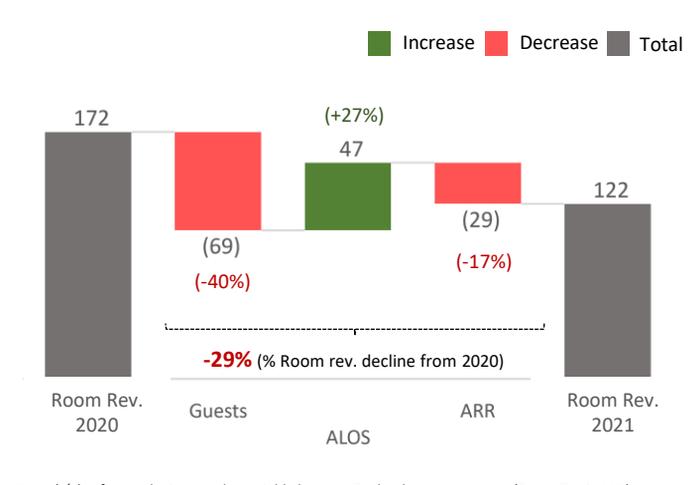
### SAADIYAT ISLAND – FEB 2021



### ADNEC – FEB 2021



### ABU DHABI ISLAND – FEB 2021



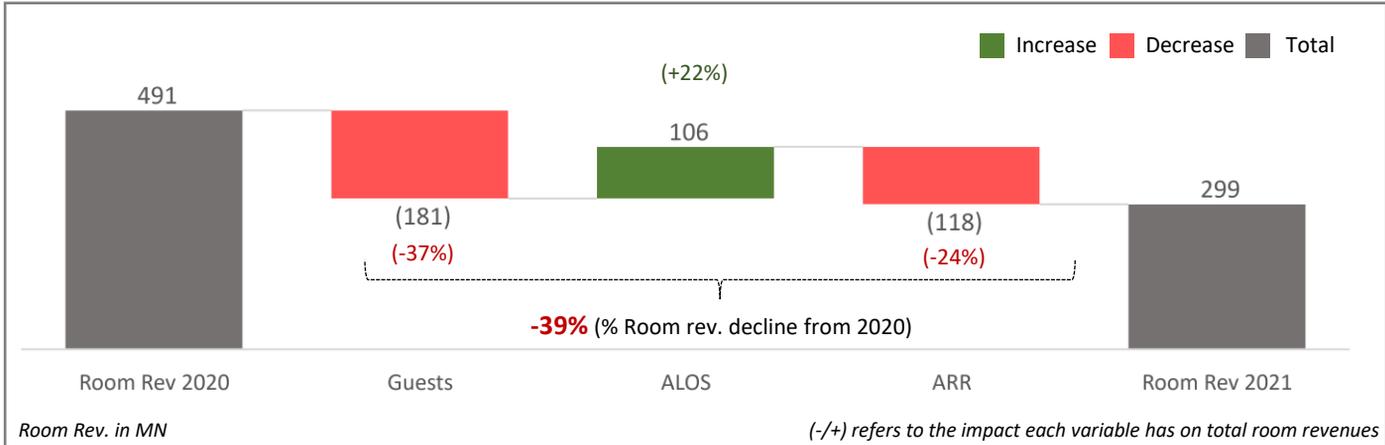
# PERFORMANCE BY ZONES

## YTD FEBRUARY 2021 – ROOM REVENUE ATTRIBUTION

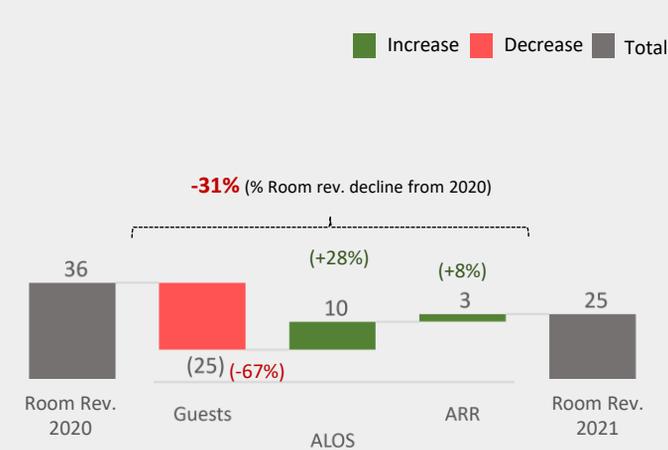


- On YTD basis, hotels in Abu Dhabi city reported significant declines (-39%) in room revenues compared to 2020, with declines largely driven by drop in guest numbers and the average room rates. High ALOS continues to offset the decline to a certain extent.
- Decline in Yas Island was primarily due to drop in hotel guests, with its impact on guests now being the largest across all other zones on YTD basis. However, the decline was neutralized to a certain extent due to increase in ALOS as well as ARR. Increase across these two metrics can be attributed to UFC 3.0, UAE Cycle tour and IDEX events that took place during the last two months

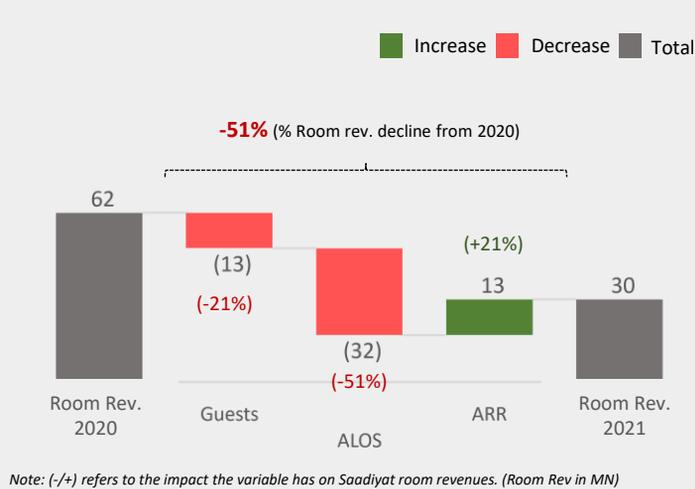
### ABU DHABI CITY – YTD FEB 2021



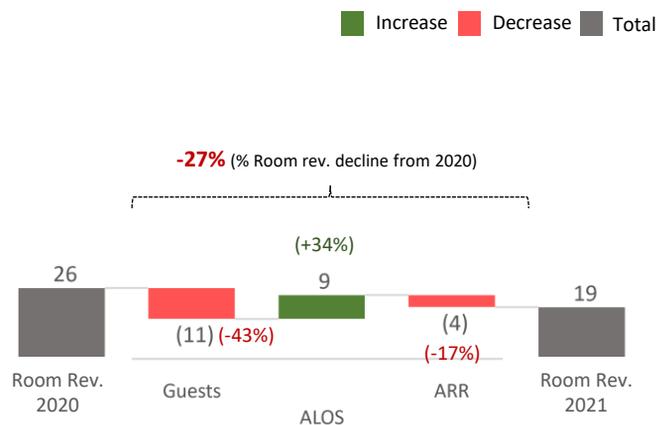
### YAS ISLAND – YTD FEB 2021



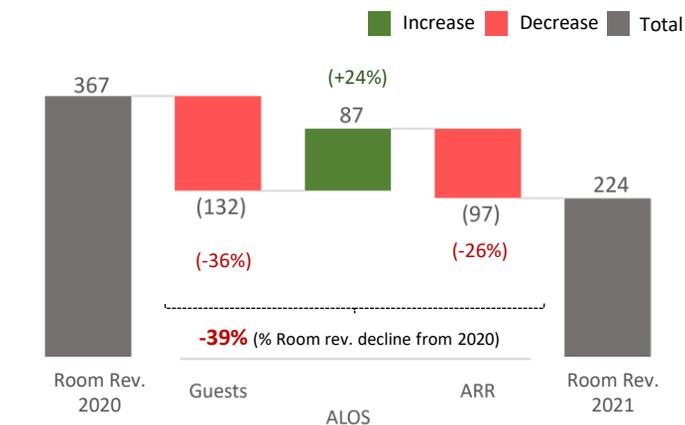
### SAADIYAT ISLAND – YTD FEB 2021



### ADNEC – YTD FEB 2021



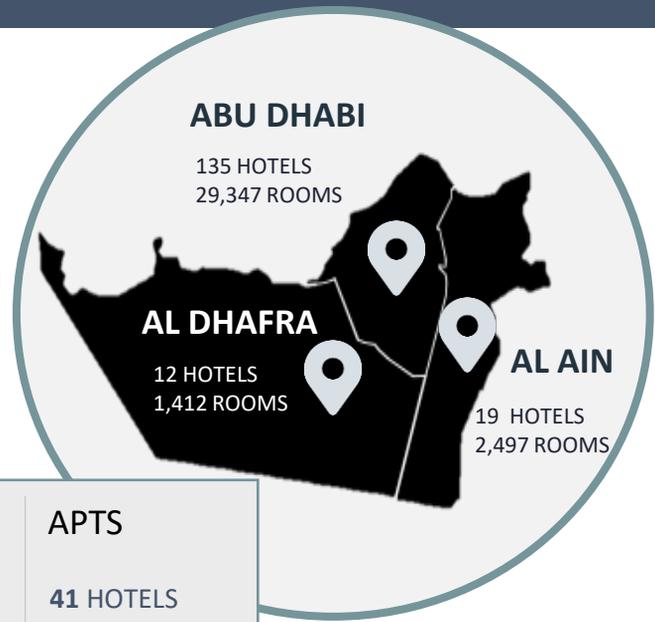
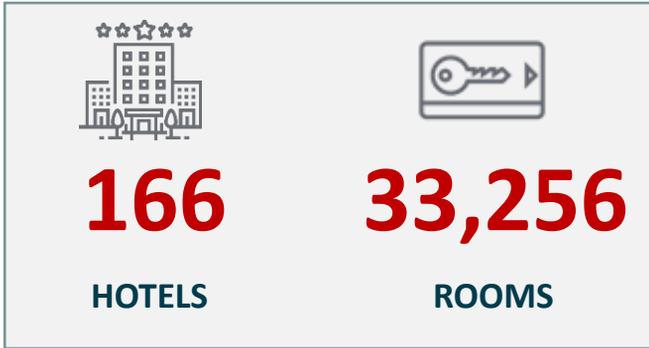
### ABU DHABI ISLAND – YTD FEB 2021



# HOTEL SUPPLY

AS OF 1<sup>st</sup> MARCH 2021

## HOTEL SUPPLY AS OF 1<sup>st</sup> March 2021



STAR RATING	5 STAR	4 STAR	3-1 STAR	APTS
	55 HOTELS 15,748 ROOMS	38 HOTELS 7,975 ROOMS	32 HOTELS 4,337 ROOMS	41 HOTELS 5,196 ROOMS

**Quarantine Hotels:** City seasons Al Ain hotel was the only addition to the list of quarantine hotels, taking the total number of quarantine hotels to from 7 in Jan to 8 hotels in Feb. As of Mar 15, these eight hotels continue to be used for quarantine purposes.

**Temporary Closed Hotels:** In February, 2 hotels (225 rooms) continue to suspend their operations for the entire month. As of Mar 15, these 2 hotels (Strand & Golden Tulip Al Jazira) remain temporarily closed

**Yas Island Hotels:** Between Feb 18 – Feb 28 2021, two hotels in Yas Island (Centro Yas and W hotel) went under lockdown due to the UAE Cycle tour event. While Centro was completely closed for the public, W Yas was partially kept open for general public (38% of all rooms).

## RECENT SUPPLY ADDITIONS AND CLOSURES - 2021

### RECENT ADDITIONS



**OPENED: JAN 2021**

**GRAVITY HOTEL**

LOCATION: AD ISLAND  
TYPE: 3 STAR HOTEL  
ROOMS: 73

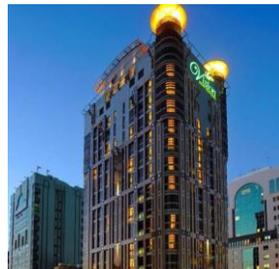


**OPENED: FEB 2021**

**HILTON YAS BAY\***

LOCATION: YAS ISLAND  
TYPE: 5 STAR HOTEL  
ROOMS: 545

### RECENT CLOSURES



**CLOSED: FEB 2021**

**VISION HOTEL APTS**

LOCATION: AD ISLAND  
TYPE: DELUXE APT  
ROOMS: 125

\*Note: Hilton Yas Bay has a room inventory of 545 rooms. However, only 327 rooms are currently made available for sale



### 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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