

ABU DHABI

HOTEL PERFORMANCE REPORT

MARCH 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 7



PERFORMANCE BY ABU DHABI ZONES

PAGE 11



OVERALL HOTEL SUPPLY

PAGE 17



GLOSSARY

PAGE 18

OVERALL PERFORMANCE

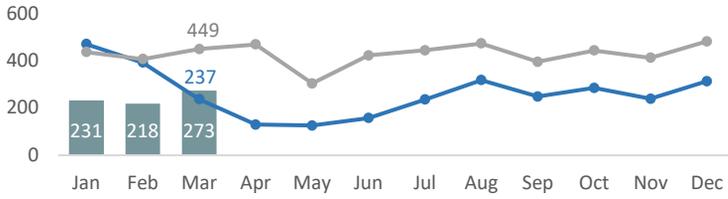
MAR & YTD MAR 2021

■ 2021 — 2020 — 2019

% Change (vs. Mar 2020) % Change (vs. Mar 2019)

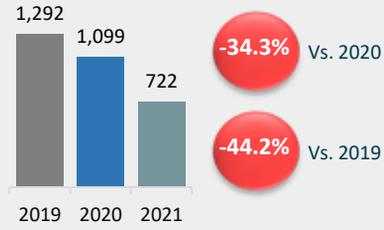
YTD MAR PERFORMANCE

HOTEL GUESTS (000)

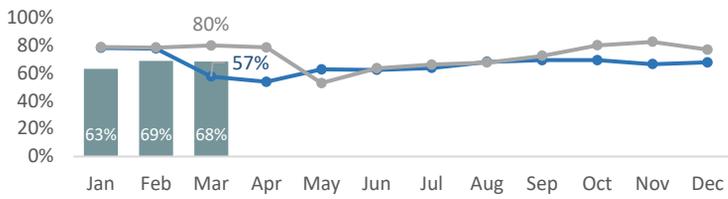


+15.3%

-39.2%



OCCUPANCY RATE

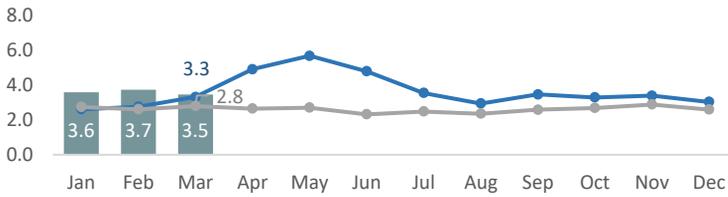


+18.9%

-14.5%



AVERAGE LENGTH OF STAY (ALOS-NIGHTS)

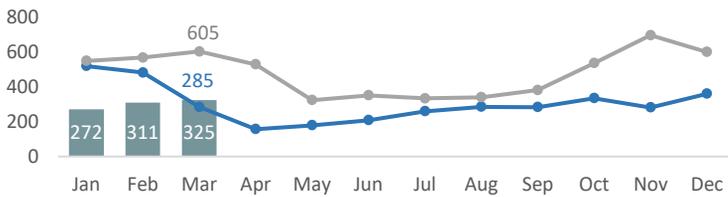


+4.2%

+23.8%

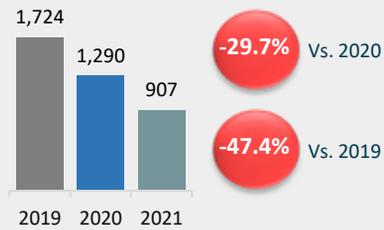


HOTEL TOTAL REVENUE (MILLION AED)

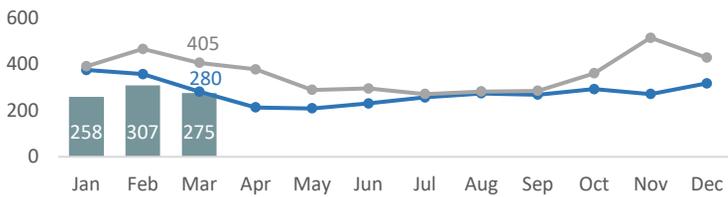


+13.8%

-46.3%

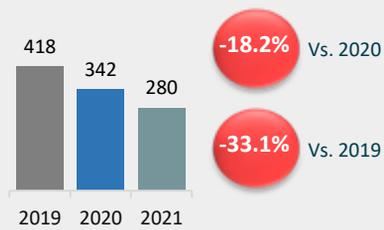


AVERAGE ROOM RATE (AED)

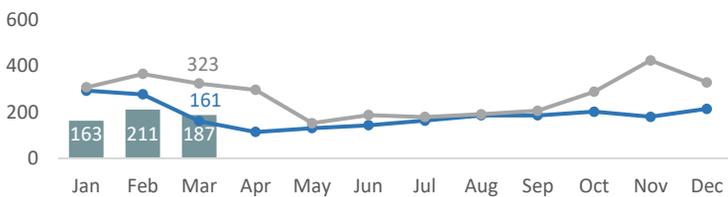


-2.0%

-32.2%

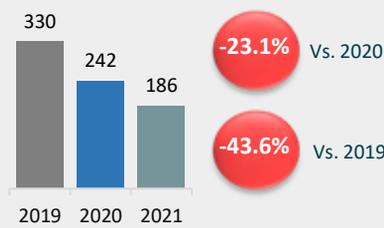


REVENUE PER AVAILABLE ROOM (AED)



+16.5%

-42.0%



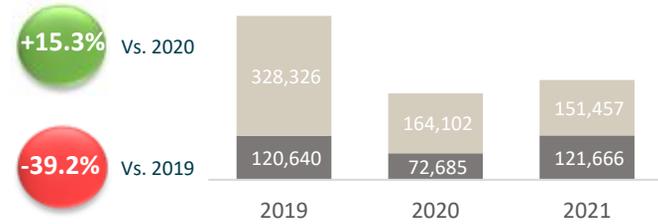
HOTEL GUESTS BY NATIONALITY

MAR & YTD MAR 2021

UAE VS. NON-UAE HOTEL GUESTS

273,123

TOTAL MAR GUESTS



■ UAE ■ Non UAE

721,817

TOTAL YTD MAR GUESTS



*UAE refers to UAE citizens

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



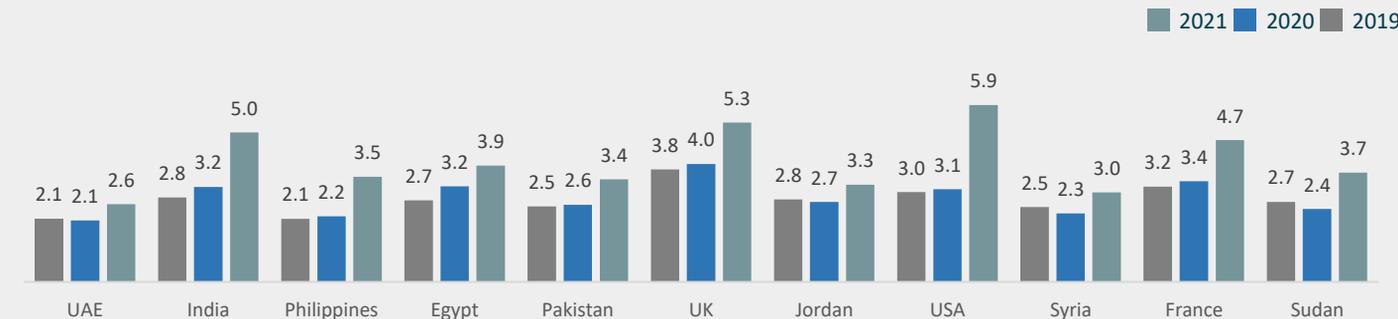
TOP 10 NON-UAE NATIONALITIES (000s) -YTD MAR 2021



ALOS (NIGHTS) – MAR 2021



ALOS (NIGHTS) – YTD MAR 2021



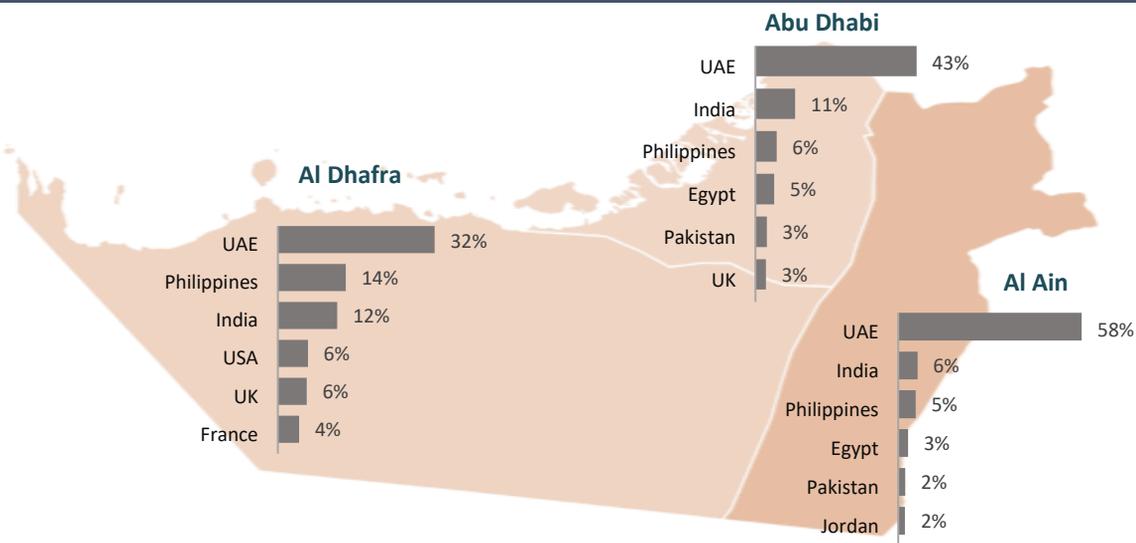
PERFORMANCE BY REGION

MAR 2021

REGIONAL PERFORMANCE – MAR 2021 vs MAR 2020

KEY INDICATORS	ABU DHABI			AL AIN			AL DHAFRA		
	Actual	% Change		Actual	% Change		Actual	% Change	
GUESTS	231,464	12.0%	▲	30,537	36.4%	▲	11,122	45.0%	▲
OCCUPANCY RATE	69%	18.3%	▲	70%	62.9%	▲	50%	-21.0%	▼
ALOS DAYS	3.6	5.4%	▲	2.4	12.0%	▲	2.8	-16.2%	▼
REVENUES (M AED)	279.2	10.8%	▲	24.5	91.6%	▲	20.9	2.2%	▲
ARR (AED)	264	-3.5%	▼	283	23.2%	▲	544	-1.3%	▼
REVPAR (AED)	182	14.1%	▲	198	100.7%	▲	274	-22.1%	▼

TOP NATIONALITIES ACROSS REGIONS – MAR 2021



REGIONAL PERFORMANCE – MAR 2021 vs MAR 2019

KEY INDICATORS	ABU DHABI			AL AIN			AL DHAFRA		
	Actual	% Change		Actual	% Change		Actual	% Change	
GUESTS	231,464	-39.9%	▼	30,537	-39.1%	▼	11,122	-17.0%	▼
OCCUPANCY RATE	69%	-16.4%	▼	70%	10.6%	▲	50%	7.2%	▲
ALOS DAYS	3.6	24.0%	▲	2.4	22.7%	▲	2.8	34.8%	▲
REVENUES (M AED)	279.2	-49.7%	▼	24.5	-8.2%	▼	20.9	-9.0%	▼
ARR (AED)	264	-35.2%	▼	283	-1.9%	▼	544	-18.1%	▼
REVPAR (AED)	182	-45.8%	▼	198	8.4%	▲	274	-12.1%	▼

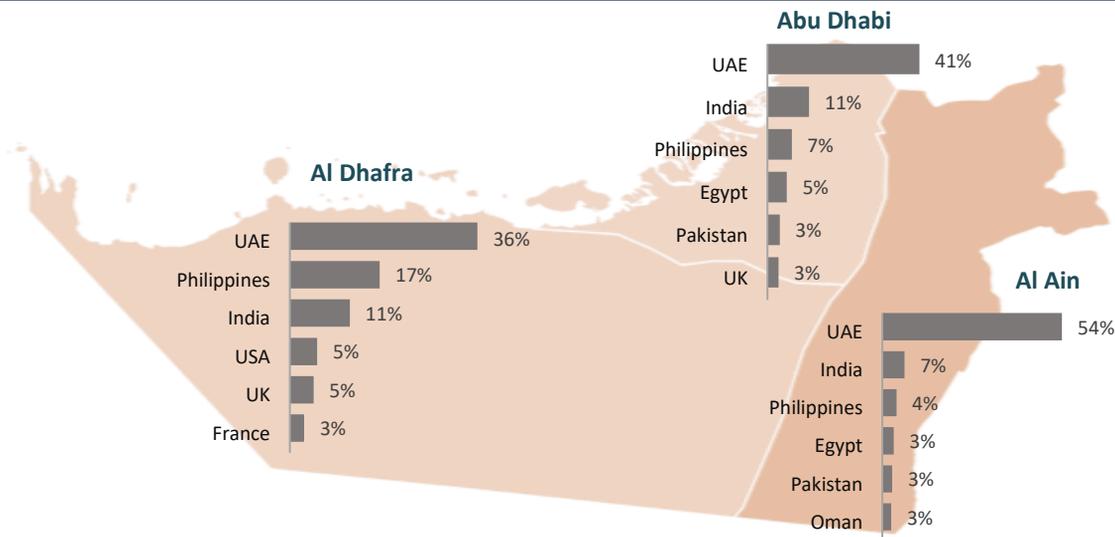
PERFORMANCE BY REGION

YTD MAR 2021

REGIONAL PERFORMANCE – YTD MAR 2021 vs YTD MAR 2020

KEY INDICATORS	ABU DHABI			AL AIN			AL DHAFRA		
	Actual	% Change		Actual	% Change		Actual	% Change	
GUESTS	614,553	-35.9%	▼	79,851	-25.7%	▼	27,413	-15.4%	▼
OCCUPANCY RATE	67%	-6.7%	▼	69%	15.7%	▲	51%	-18.7%	▼
ALOS DAYS	3.7	26.8%	▲	2.7	42.8%	▲	3.1	24.5%	▲
REVENUES (M AED)	784.3	-32.3%	▼	64.2	4.0%	▲	58.5	-16.1%	▼
ARR (AED)	270	-19.7%	▼	269	3.5%	▲	545	-22.4%	▼
REVPAR (AED)	182	-25.1%	▼	185	19.7%	▲	275	-36.9%	▼

TOP NATIONALITIES ACROSS REGIONS – YTD MAR 2021



REGIONAL PERFORMANCE – YTD MAR 2021 vs YTD MAR 2019

KEY INDICATORS	ABU DHABI			AL AIN			AL DHAFRA		
	Actual	% Change		Actual	% Change		Actual	% Change	
GUESTS	614,553	-45.2%	▼	79,851	-39.8%	▼	27,413	-27.3%	▼
OCCUPANCY RATE	67%	-17.0%	▼	69%	1.0%	▲	51%	0.5%	▲
ALOS DAYS	3.7	31.9%	▲	2.7	34.9%	▲	3.1	37.1%	▲
REVENUES (M AED)	784.3	-49.7%	▼	64.2	-21.6%	▼	58.5	-30.3%	▼
ARR (AED)	270	-35.0%	▼	269	-9.1%	▼	545	-35.2%	▼
REVPAR (AED)	182	-46.1%	▼	185	-8.3%	▼	275	-34.9%	▼

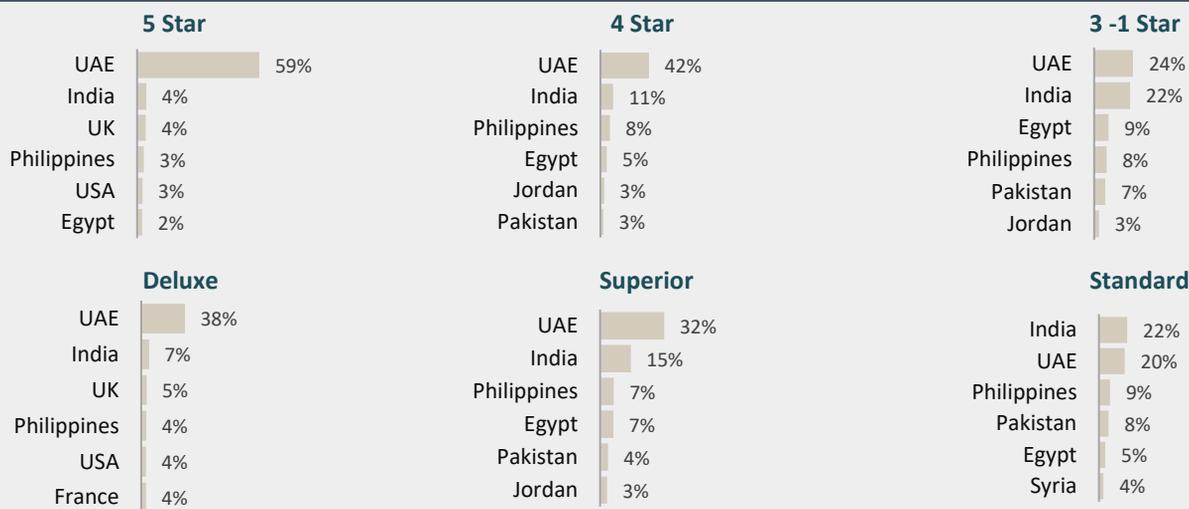
PERFORMANCE BY STAR RATING

MAR 2021

PERFORMANCE ACROSS KEY INDICATORS* - MAR 2021 vs MAR 2020

KEY INDICATORS	5 Star		4 Star		3-1 Star		Hotel Apts.	
	Actual	% Change	Actual	% Change	Actual	% Change	Actual	% Change
GUESTS	102,180	+7.6%	101,590	+26.7%	40,704	+1.9%	28,649	+32.1%
OCCUPANCY RATE	60%	+32.1%	76%	+16.0%	70%	+15.5%	81%	+4.7%
ALOS DAYS	3.6	+13.2%	2.4	-1.0%	2.8	+0.1%	7.4	-6.6%
REVENUES (M AED)	216.1	+20.8%	59.2	+16.3%	18.6	-10.6%	30.6	-11.6%
ARR (AED)	386	-4.2%	193	+1.1%	148	-14.4%	230	-9.8%
REVPAR (AED)	230	+26.5%	146	+17.3%	104	-1.1%	186	-5.6%

TOP NATIONALITIES – MAR 2021



PERFORMANCE ACROSS KEY INDICATORS* - MAR 2021 vs MAR 2019

KEY INDICATORS	5 Star		4 Star		3-1 Star		Hotel Apts.	
	Actual	% Change	Actual	% Change	Actual	% Change	Actual	% Change
GUESTS	102,180	-50.2%	101,590	-25.4%	40,704	-41.2%	28,649	-25.2%
OCCUPANCY RATE	60%	-20.8%	76%	-9.3%	70%	-12.7%	81%	-4.8%
ALOS DAYS	3.6	+29.9%	2.4	+12.2%	2.8	+18.1%	7.4	+29.1%
REVENUES (M AED)	216.1	-46.6%	59.2	-45.3%	18.6	-57.7%	30.6	-36.2%
ARR (AED)	386	-32.4%	193	-34.8%	148	-38.3%	230	-22.4%
REVPAR (AED)	230	-46.5%	146	-40.9%	104	-46.1%	186	-26.1%

*Note: Jumeriah at Etihad towers was rebranded to Conrad Abu Dhabi Etihad Towers on Oct 1, 2020. The establishment's Q1 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

YTD MAR 2021

PERFORMANCE ACROSS KEY INDICATORS* - YTD MAR 2021 vs YTD MAR 2020

KEY INDICATORS	5 Star		4 Star		3-1 Star		Hotel Apts.	
	Actual	% Change	Actual	% Change	Actual	% Change	Actual	% Change
GUESTS	268,046	-46.4%	260,007	-23.6%	117,847	-31.4%	75,917	-12.3%
OCCUPANCY RATE	57%	-7.5%	74%	-4.0%	72%	-2.7%	78%	-6.6%
ALOS DAYS	3.8	+40.7%	2.6	+14.4%	3.1	+28.8%	7.2	+6.7%
REVENUES (M AED)	585.9	-32.7%	172.1	-19.4%	60.6	-30.6%	88.5	-25.4%
ARR (AED)	391	-21.3%	205	-11.9%	162	-17.2%	234	-13.0%
REVPAR (AED)	224	-27.2%	152	-15.4%	117	-19.4%	183	-18.7%

TOP NATIONALITIES – YTD MAR 2021



PERFORMANCE ACROSS KEY INDICATORS* - YTD MAR 2021 vs YTD MAR 2019

KEY INDICATORS	5 Star		4 Star		3-1 Star		Hotel Apts.	
	Actual	% Change	Actual	% Change	Actual	% Change	Actual	% Change
GUESTS	268,046	-53.5%	260,007	-35.4%	117,847	-40.2%	75,917	-34.9%
OCCUPANCY RATE	57%	-21.7%	74%	-13.0%	72%	-9.9%	78%	-7.1%
ALOS DAYS	3.8	+41.1%	2.6	+19.4%	3.1	+26.9%	7.2	+32.3%
REVENUES (M AED)	585.9	-49.7%	172.1	-42.6%	60.6	-50.9%	88.5	-35.3%
ARR (AED)	391	-36.1%	205	-30.3%	162	-31.5%	234	-20.8%
REVPAR (AED)	224	-49.9%	152	-39.4%	117	-38.3%	183	-26.4%

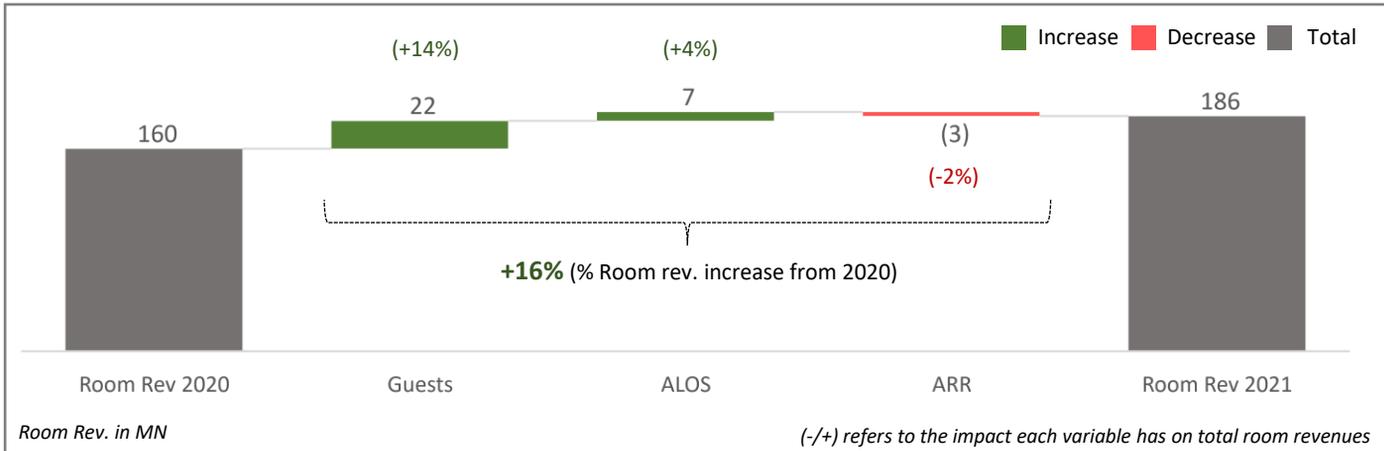
*Note: Jumeriah at Etihad towers was rebranded to Conrad Abu Dhabi Etihad Towers on Oct 1, 2020. The establishment's Q1 2021 performance includes combined performance for both Etihad towers and apartments under 5-star classification. This may be subject to change under certain circumstances

PERFORMANCE BY STAR RATING

MAR 2021 – ROOM REVENUE ATTRIBUTION

- In Mar, hotels in Abu Dhabi Emirate reported a double-digit growth (+16%) in room revenues compared to same period in 2020. Year-over-year percentage increases are substantial as prior year comparison has now shifted to pandemic-affected months in 2020. Increase in room revenues is primarily driven by positive performance across 5 & 4-star hotels. These hotel types account for 71% of total room supply
- 3-1 star & hotel apts recorded a drop in room revenues compared to 2020. The decline was largely driven by drop in room rates and to a certain extent, due to the reduced length of stay in hotel apartments. However, it was partially offset by increase in guest numbers

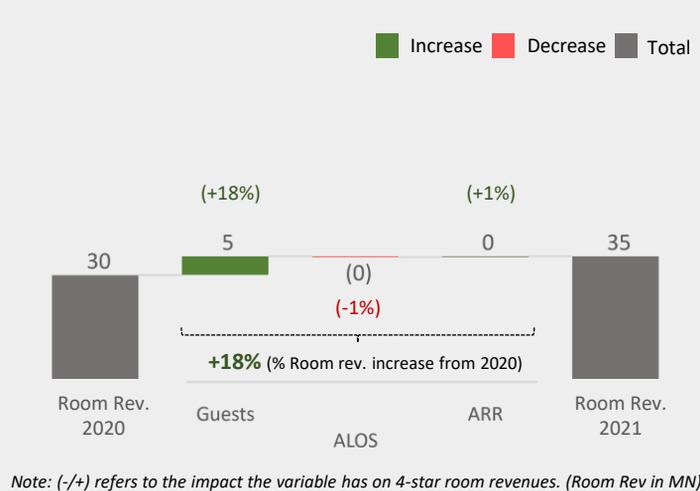
ABU DHABI EMIRATE – MAR 2021



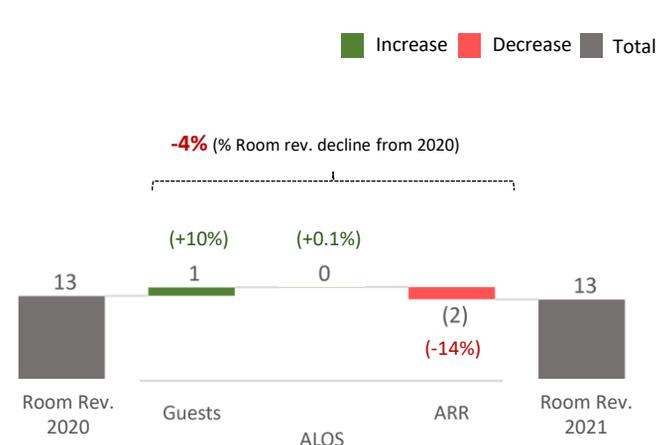
5-STAR HOTELS – MAR 2021



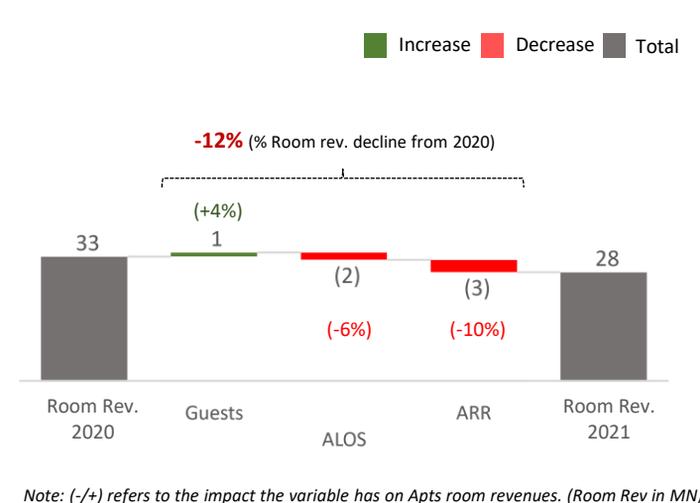
4-STAR HOTELS – MAR 2021



3-1 STAR HOTELS – MAR 2021



HOTEL APARTMENTS – MAR 2021

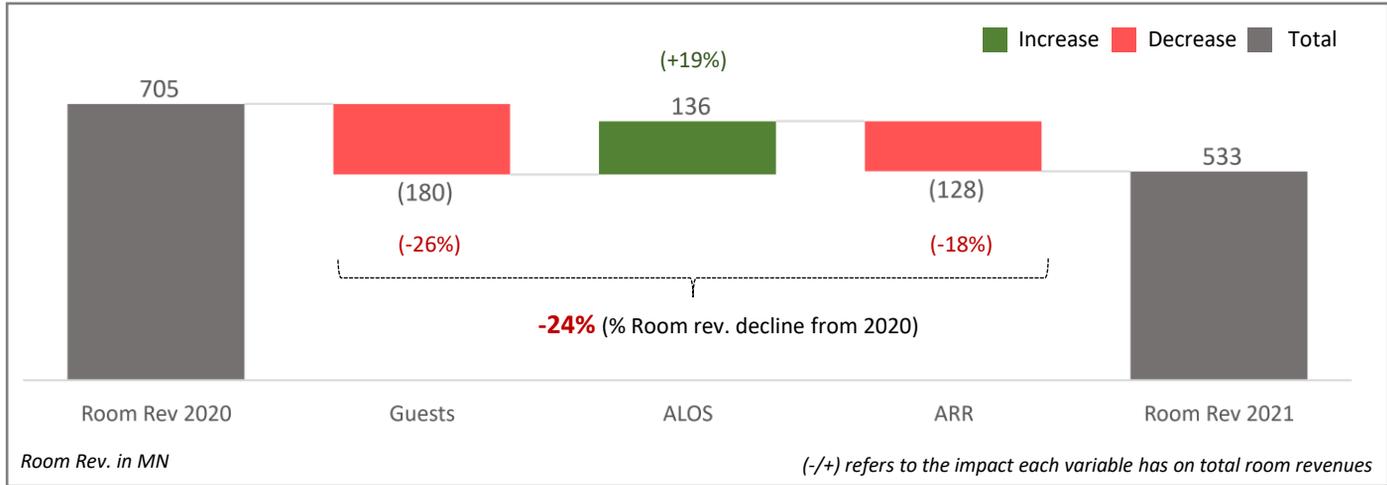


PERFORMANCE BY STAR RATING

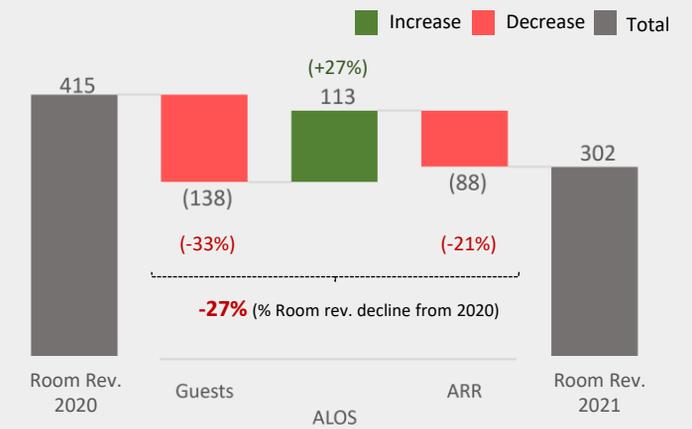
YTD MAR 2021 – ROOM REVENUE ATTRIBUTION

- 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 (-27%), closely followed by hotel apartments (-25%). Decline across all hotel types continue to be largely driven by drop in guest numbers and average room rates

ABU DHABI EMIRATE – YTD MAR 2021

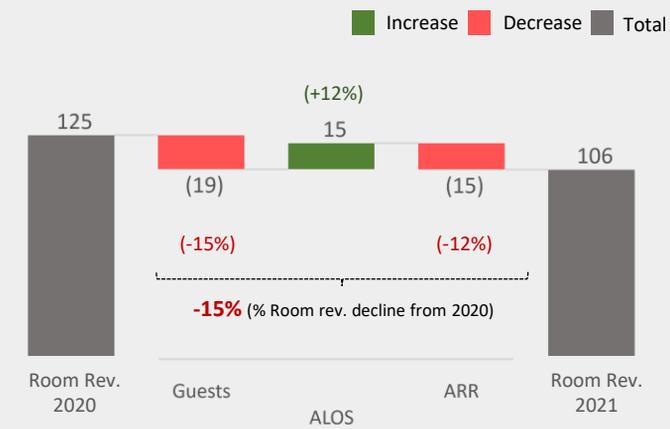


5-STAR HOTELS – YTD MAR 2021



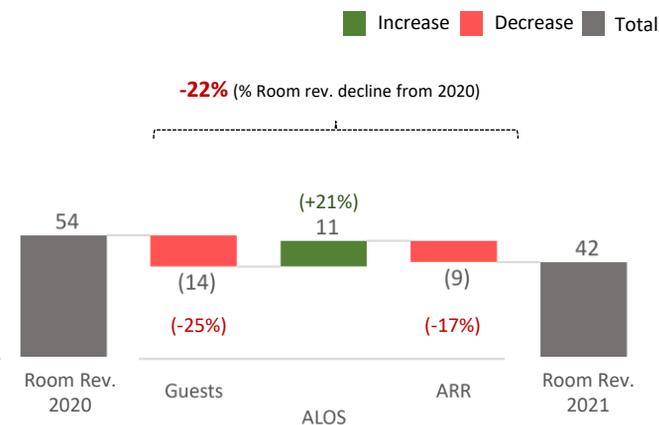
Note: (-/+ refers to the impact the variable has on 5-star room revenues. (Room Rev in MN))

4-STAR HOTELS – YTD MAR 2021



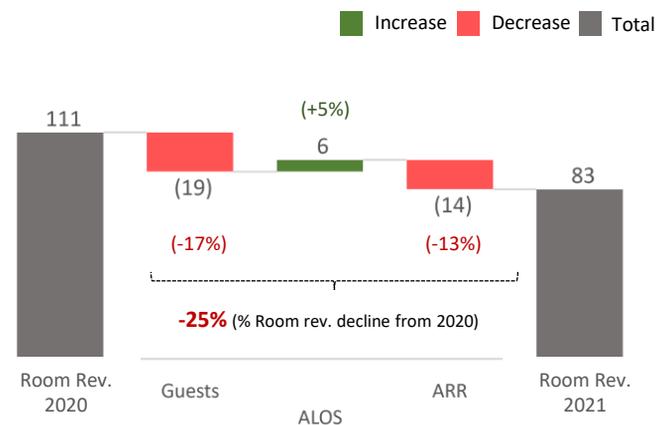
Note: (-/+ refers to the impact the variable has on 4-star room revenues. (Room Rev in MN))

3-1 STAR HOTELS – YTD MAR 2021



Note: (-/+ refers to the impact the variable has on 3-1 star room revenues. (Room Rev in MN))

HOTEL APARTMENTS – YTD MAR 2021



Note: (-/+ refers to the impact the variable has on Apts room revenues. (Room Rev in MN))

YAS ISLAND PERFORMANCE

MAR & YTD MAR 2021

OVERALL PERFORMANCE

KEY INDICATORS	MAR 2021			YTD MAR 2021		
	Actual	% Change Vs 2020	% Change Vs 2019	Actual	% Change Vs 2020	% Change Vs 2019
GUESTS	24,024	166.6% ▲	-23.0% ▼	50,336	-32.2% ▼	-48.5% ▼
OCCUPANCY RATE	41%	8.2% ▲	-54.5% ▼	48%	-24.9% ▼	-46.3% ▼
ALOS NIGHTS	1.8	-48.2% ▼	-38.8% ▼	2.7	-0.5% ▼	-3.3% ▼
REVENUES (M AED)	13.1	29.9% ▲	-70.5% ▼	50.5	-27.4% ▼	-57.4% ▼
ARR (AED)	263	27.4% ▲	-32.4% ▼	339	7.3% ▲	-11.9% ▼
REVPAR (AED)	107	37.9% ▲	-69.2% ▼	164	-19.4% ▼	-52.7% ▼

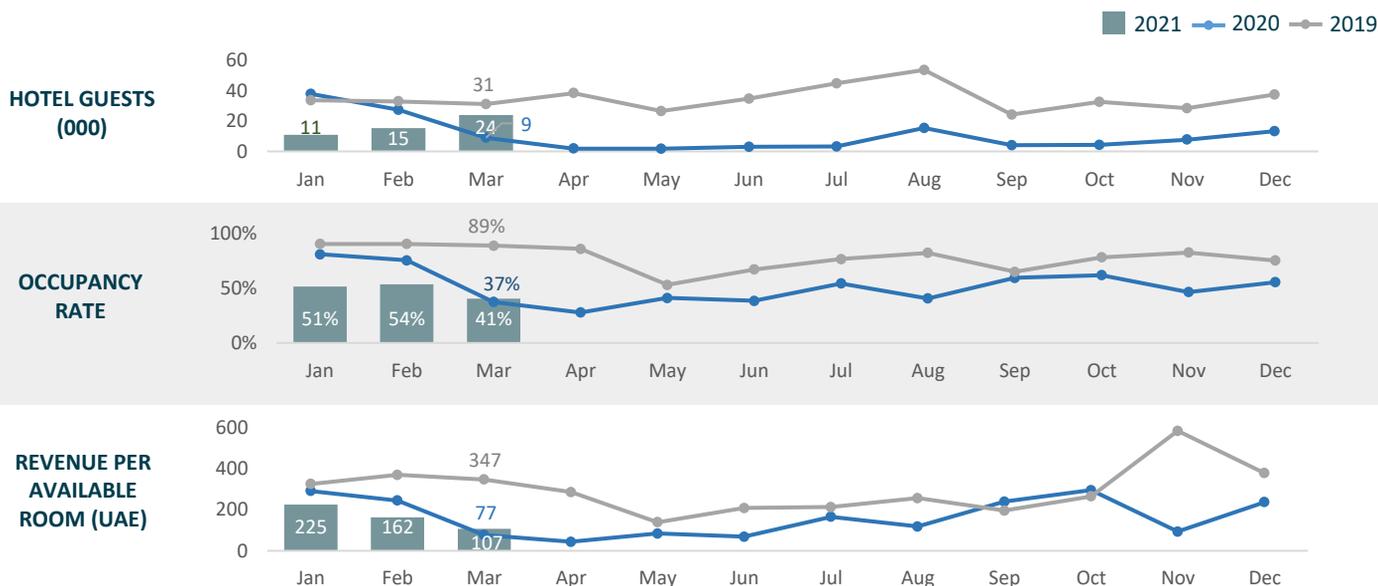
TOP NATIONALITIES (000s) – MAR 2021

Nationality	000s	% Change (vs. 2020)	% Change (vs. 2019)	% Share (2021)
UAE	8.5	117.6%	28.3%	35.5%
France	1.8	535.6%	220.0%	7.6%
India	1.8	135.4%	-48.5%	7.3%
Philippines	1.6	1049.3%	160.7%	6.8%
Egypt	1.6	1900.0%	153.1%	6.7%
UK	1.4	137.8%	-56.2%	5.9%
Jordan	1.1	2550.0%	201.1%	4.4%
Syria	0.5	1896.3%	118.2%	2.2%
USA	0.4	22.7%	-68.7%	1.8%
South Africa	0.4	205.4%	-21.7%	1.7%
Pakistan	0.3	298.9%	-22.0%	1.4%

TOP NATIONALITIES (000s) - YTD MAR 2021

Nationality	000s	% Change (vs. 2020)	% Change (vs. 2019)	% Share (2021)
UAE	17.3	3.8%	-19.5%	34.4%
India	3.8	-63.5%	-64.6%	7.5%
UK	3.6	-40.1%	-55.5%	7.2%
Philippines	3.0	125.2%	43.3%	6.0%
Egypt	2.6	35.2%	49.6%	5.1%
France	2.3	41.7%	47.7%	4.6%
Jordan	1.8	67.7%	21.6%	3.5%
USA	1.6	-44.6%	-59.2%	3.2%
Pakistan	1.1	18.0%	-13.0%	2.1%
South Africa	0.9	-22.1%	-36.7%	1.8%
Syria	0.9	142.7%	29.4%	1.8%

MONTHLY TRENDS



SAADIYAT & NICHE AREAS PERFORMANCE

MAR & YTD MAR 2021

OVERALL PERFORMANCE

KEY INDICATORS	MAR 2021			YTD MAR 2021		
	Actual	% Change Vs 2020	% Change Vs 2019	Actual	% Change Vs 2020	% Change Vs 2019
GUESTS	14,084	93.9% ▲	-5.7% ▼	31,566	-5.3% ▼	-19.6% ▼
OCCUPANCY RATE	34%	0.7% ▲	-56.6% ▼	30%	-42.0% ▼	-54.5% ▼
ALOS NIGHTS	2.5	-41.9% ▼	-47.9% ▼	2.4	-45.0% ▼	-45.2% ▼
REVENUES (M AED)	41.1	27.7% ▲	-48.0% ▼	95.9	-39.8% ▼	-51.5% ▼
ARR (AED)	1,243	50.4% ▲	14.5% ▲	1,213	27.8% ▲	4.7% ▲
REVPAR (AED)	423	51.5% ▲	-50.4% ▼	363	-25.9% ▼	-52.4% ▼

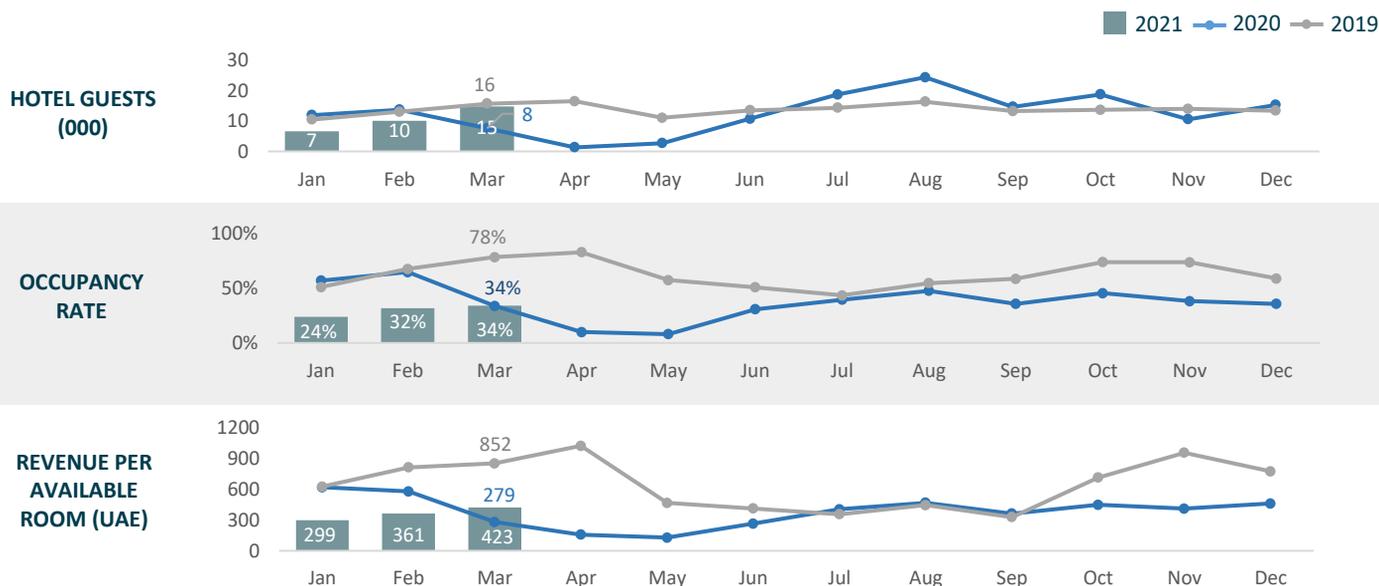
TOP NATIONALITIES (000s) – MAR 2021

Nationality	000s	% Change (vs. 2020)	% Change (vs. 2019)	% Share (2021)
UAE	9.2	286.2%	282.7%	62.2%
UK	1.0	11.0%	-48.3%	6.7%
USA	0.4	211.7%	-25.4%	2.7%
France	0.4	25.7%	-40.9%	2.6%
Lebanon	0.3	479.3%	133.3%	2.3%
Jordan	0.3	863.3%	165.1%	2.0%
India	0.3	91.9%	0.7%	1.9%
Canada	0.3	371.2%	94.4%	1.9%
Egypt	0.2	254.1%	83.1%	1.5%
Philippines	0.2	157.5%	255.2%	1.4%
Kazakhstan	0.2	-28.1%	-82.8%	1.1%

TOP NATIONALITIES (000s) - YTD MAR 2021

Nationality	000s	% Change (vs. 2020)	% Change (vs. 2019)	% Share (2021)
UAE	19.7	178.8%	168.3%	62.3%
UK	2.1	-48.8%	-55.5%	6.6%
USA	0.7	-28.6%	-51.1%	2.3%
France	0.7	-57.1%	-57.0%	2.2%
India	0.7	-8.4%	-53.7%	2.1%
Lebanon	0.6	58.5%	46.5%	1.8%
Philippines	0.6	90.7%	162.4%	1.7%
Canada	0.5	65.8%	34.3%	1.5%
Jordan	0.5	74.6%	52.9%	1.4%
Egypt	0.4	-15.6%	12.7%	1.3%
Russia	0.4	-88.1%	-86.7%	1.3%

MONTHLY TRENDS



ADNEC PERFORMANCE

MAR & YTD MAR 2021

OVERALL PERFORMANCE

KEY INDICATORS	MAR 2021			YTD MAR 2021		
	Actual	% Change Vs 2020	% Change Vs 2019	Actual	% Change Vs 2020	% Change Vs 2019
GUESTS	15,353	12.0% ▲	-52.7% ▼	43,375	-33.4% ▼	-46.0% ▼
OCCUPANCY RATE	77%	21.9% ▲	-13.1% ▼	78%	-1.5% ▼	-11.8% ▼
ALOS NIGHTS	4.0	-8.0% ▼	60.5% ▲	4.4	32.4% ▲	48.8% ▲
REVENUES (M AED)	11.5	22.7% ▲	-50.2% ▼	36.4	-18.9% ▼	-43.8% ▼
ARR (AED)	190	3.9% ▲	-42.5% ▼	214	-14.0% ▼	-36.3% ▼
REVPAR (AED)	147	26.7% ▲	-50.0% ▼	166	-15.3% ▼	-43.8% ▼

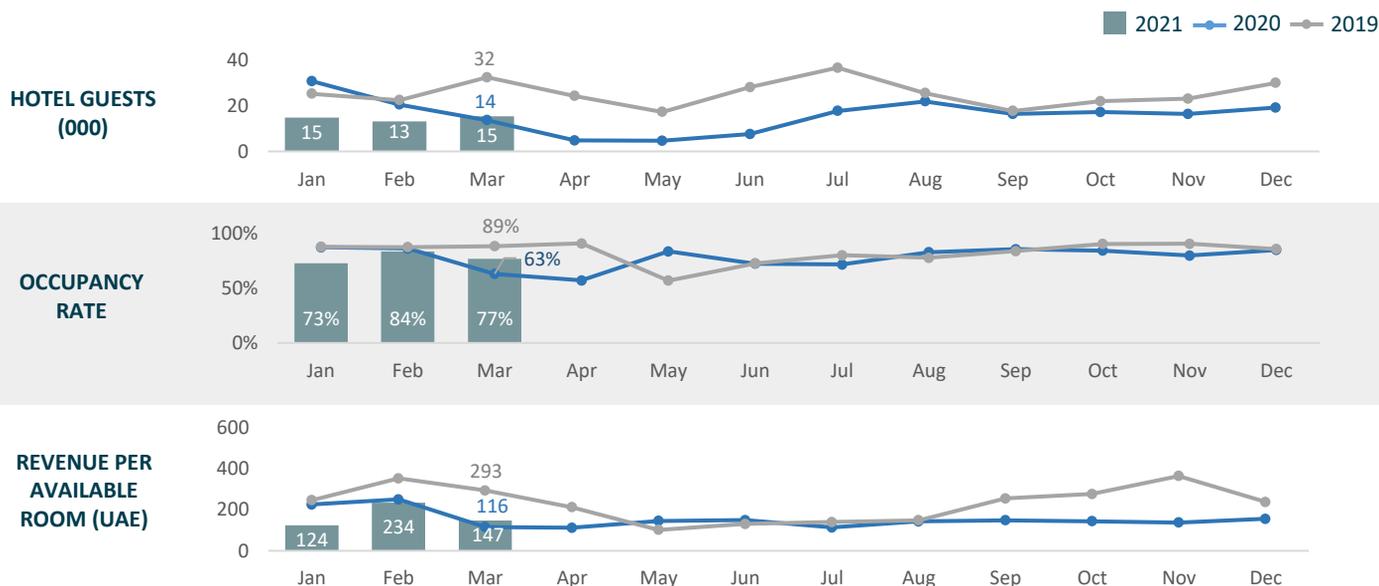
TOP NATIONALITIES (000s) – MAR 2021

Nationality	000s	% Change (vs. 2020)	% Change (vs. 2019)	% Share (2021)
UAE	8.4	34.0%	-19.5%	54.7%
India	1.0	23.7%	-26.1%	6.3%
Egypt	0.8	-10.3%	-44.7%	4.9%
Philippines	0.5	24.7%	-30.4%	3.6%
Jordan	0.5	21.5%	-31.7%	3.4%
Pakistan	0.4	-7.1%	-17.8%	2.9%
Syria	0.3	27.1%	-11.2%	2.0%
USA	0.2	-47.6%	-84.9%	1.5%
UK	0.2	-30.9%	-85.0%	1.5%
Palestine	0.2	109.7%	63.9%	1.3%
Lebanon	0.2	18.2%	-46.9%	1.2%

TOP NATIONALITIES (000s) - YTD MAR 2021

Nationality	000s	% Change (vs. 2020)	% Change (vs. 2019)	% Share (2021)
UAE	23.0	-7.7%	-14.1%	53.0%
India	2.6	-37.9%	-39.5%	6.0%
Egypt	2.1	-31.5%	-32.3%	4.8%
Jordan	1.5	-13.3%	-31.5%	3.4%
Philippines	1.4	-8.8%	-49.2%	3.3%
Pakistan	1.2	-19.8%	-32.5%	2.9%
USA	0.9	-57.7%	-68.7%	2.1%
UK	0.8	-58.5%	-75.4%	1.8%
Syria	0.8	-10.3%	-21.2%	1.7%
Lebanon	0.6	-5.4%	-35.6%	1.3%
S.Korea	0.6	-17.7%	-34.9%	1.3%

MONTHLY TRENDS



ABU DHABI ISLAND PERFORMANCE

MAR & YTD MAR 2021

OVERALL PERFORMANCE

KEY INDICATORS	MAR 2021			YTD MAR 2021		
	Actual	% Change Vs 2020	% Change Vs 2019	Actual	% Change Vs 2020	% Change Vs 2019
GUESTS	177,283	0.5% ▲	-42.1% ▼	489,276	-37.8% ▼	-45.9% ▼
OCCUPANCY RATE	74%	19.2% ▲	-9.7% ▼	71%	-4.0% ▼	-12.1% ▼
ALOS NIGHTS	3.9	18.1% ▲	37.2% ▲	3.9	34.6% ▲	40.4% ▲
REVENUES (M AED)	213.5	6.5% ▲	-47.8% ▼	601.5	-32.0% ▼	-48.9% ▼
ARR (AED)	236	-9.8% ▼	-35.6% ▼	242	-22.7% ▼	-36.7% ▼
REVPAR (AED)	174	7.5% ▲	-41.9% ▼	172	-25.8% ▼	-44.4% ▼

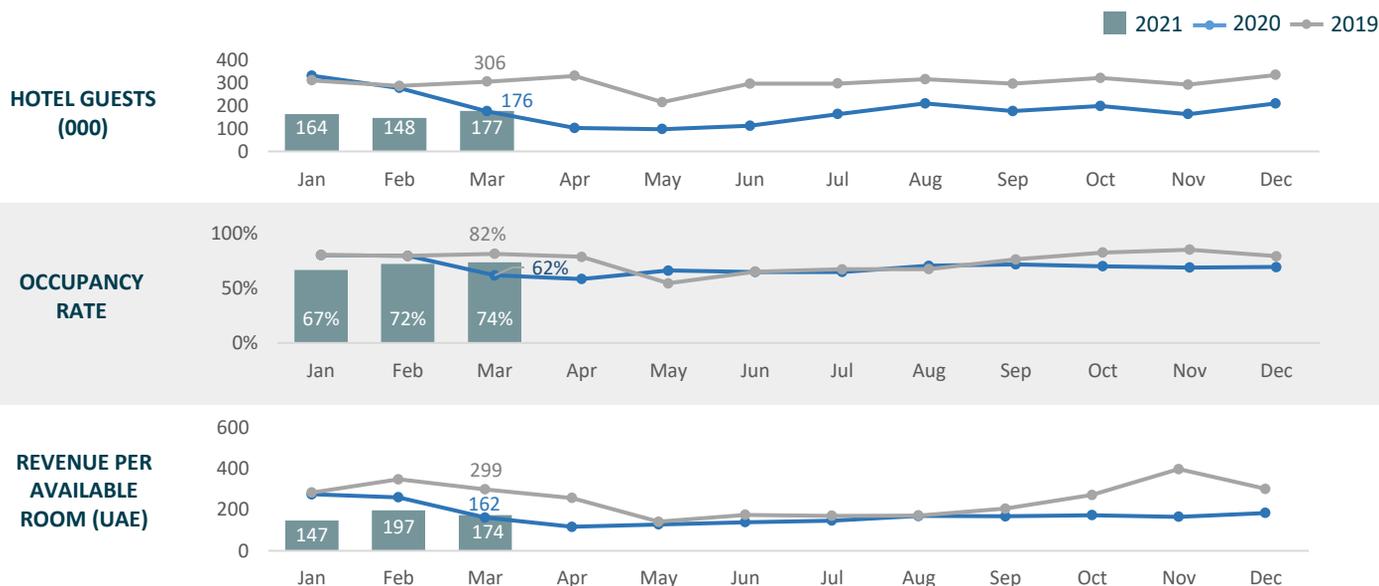
TOP NATIONALITIES (000s) – MAR 2021

Nationality	Value (000s)	% Change (vs. 2020)	% Change (vs. 2019)	% Share (2021)
UAE	74.2	56.2%	2.0%	41.9%
India	21.7	7.4%	-6.5%	12.2%
Philippines	10.8	62.4%	22.2%	6.1%
Egypt	9.1	-5.8%	-20.0%	5.2%
Pakistan	6.2	9.0%	-8.7%	3.5%
Jordan	4.4	-7.7%	-36.1%	2.5%
UK	3.9	-52.8%	-76.3%	2.2%
USA	3.4	-62.2%	-79.9%	1.9%
Syria	3.1	1.3%	-20.8%	1.8%
Sudan	2.4	63.8%	18.3%	1.3%
China	2.0	-30.9%	-92.4%	1.2%

TOP NATIONALITIES (000s) - YTD MAR 2021

Nationality	Value (000s)	% Change (vs. 2020)	% Change (vs. 2019)	% Share (2021)
UAE	191.1	-2.5%	-6.7%	39.0%
India	62.0	-22.4%	-13.3%	12.7%
Philippines	35.2	43.7%	34.6%	7.2%
Egypt	27.1	-25.2%	-24.2%	5.5%
Pakistan	17.8	-5.3%	-14.3%	3.6%
Jordan	13.2	-33.8%	-40.4%	2.7%
UK	11.6	-69.3%	-75.7%	2.4%
USA	10.2	-73.1%	-77.0%	2.1%
Syria	8.3	-26.0%	-25.1%	1.7%
Sudan	5.8	18.5%	5.9%	1.2%
Morocco	5.7	-25.3%	-26.3%	1.2%

MONTHLY TRENDS

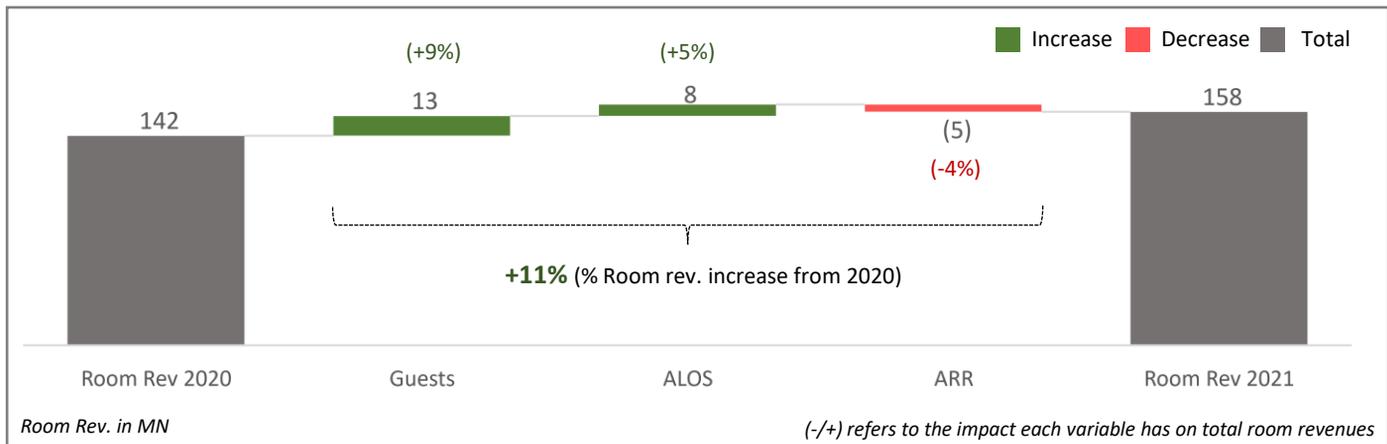


PERFORMANCE BY ZONES

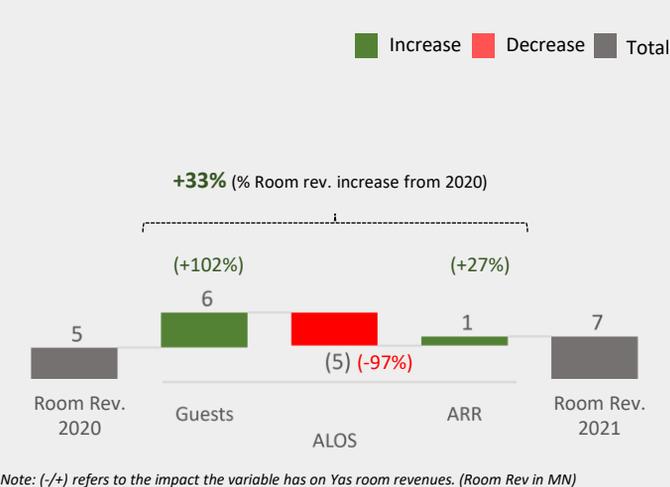
MAR 2021 – ROOM REVENUE ATTRIBUTION

- In Mar, all Abu Dhabi zones reported an increase in room revenues compared to 2020, with Saadiyat Island recording the largest increase (+47%). Year-over-year percentage increases are substantial because of the comparison with pandemic-affected month (Mar 2020)
- Across most zones, increase in room revenue is primarily because of high guest count and room rates. Having said that, ALOS continues to remain below the 2020 levels. High ALOS in Mar 2020 is likely because of companies (private and public) accommodating their employees in hotels and the presence of long-term guests (as a result of quarantine and/or travel restrictions for stranded tourists). In contrast to other zones, increase in Abu Dhabi Island (+5% - the lowest across Abu Dhabi zones) was driven by higher length of stay compared to 2020

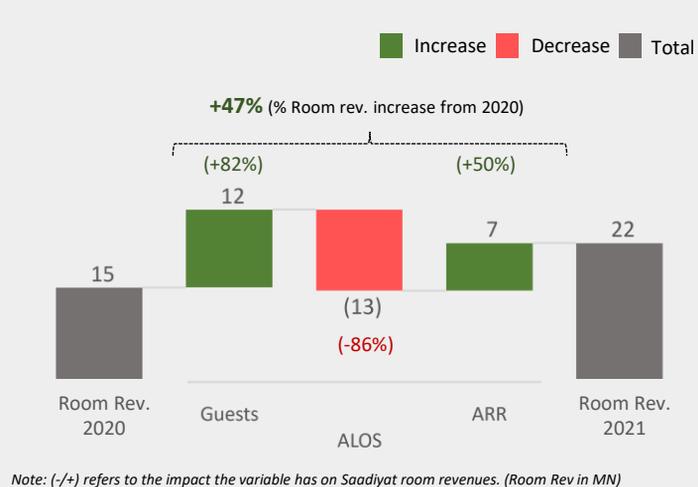
ABU DHABI CITY – MAR 2021



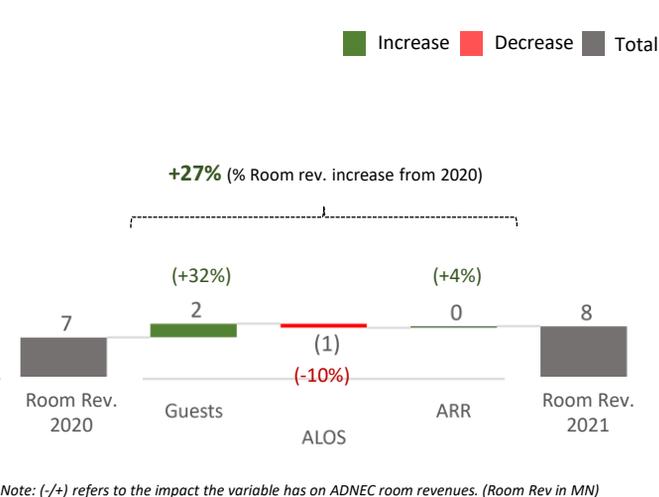
YAS ISLAND – MAR 2021



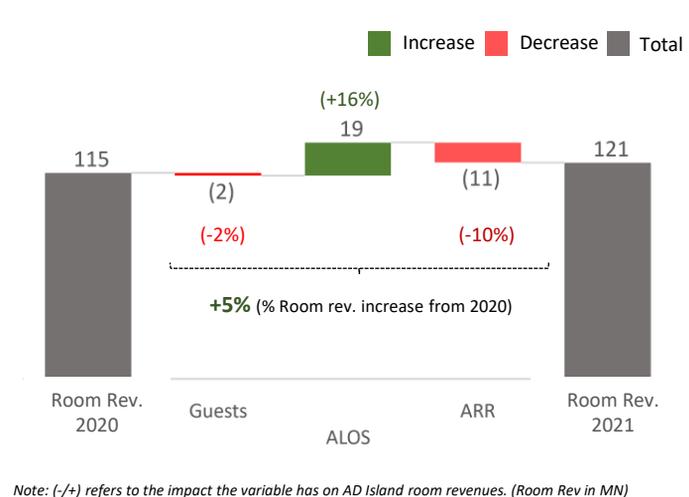
SAADIYAT ISLAND – MAR 2021



ADNEC – MAR 2021



ABU DHABI ISLAND – MAR 2021

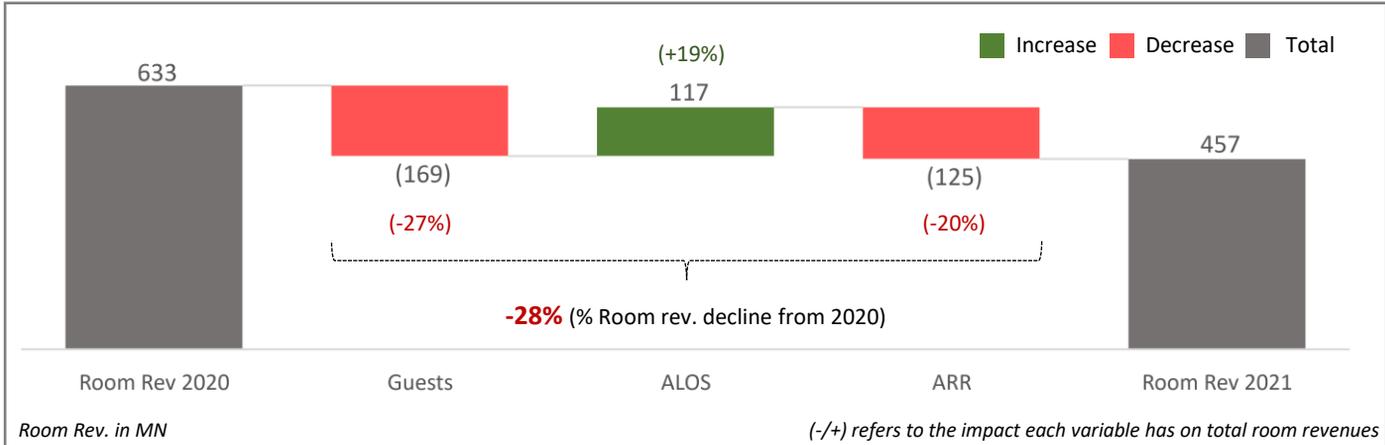


PERFORMANCE BY ZONES

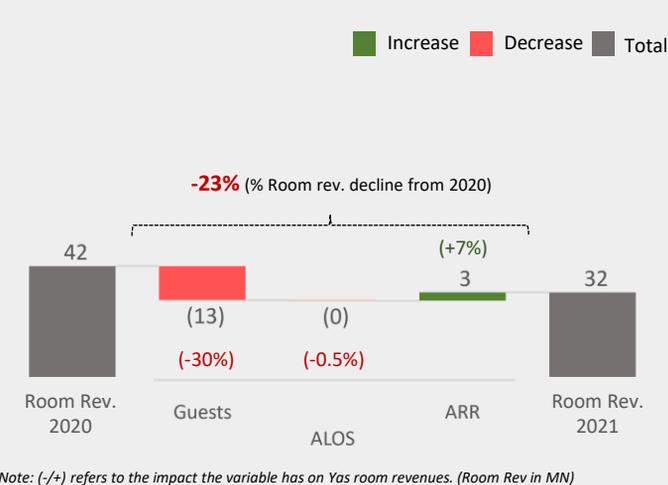
YTD MAR 2021 – ROOM REVENUE ATTRIBUTION

- On YTD basis, hotels in Abu Dhabi city reported significant declines (-28%) 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.
- While most zones reported significant declines in their guest numbers impacting their room revenue vs 2020, decline in room revenues in Saadiyat Island was highly attributed to reduced length of stay. However, hotels in Saadiyat have partially offset this with higher prices, with ARR increasing by 28% vs 2020. In 2020, High ALOS in Saadiyat Island was driven by presence of international visitors

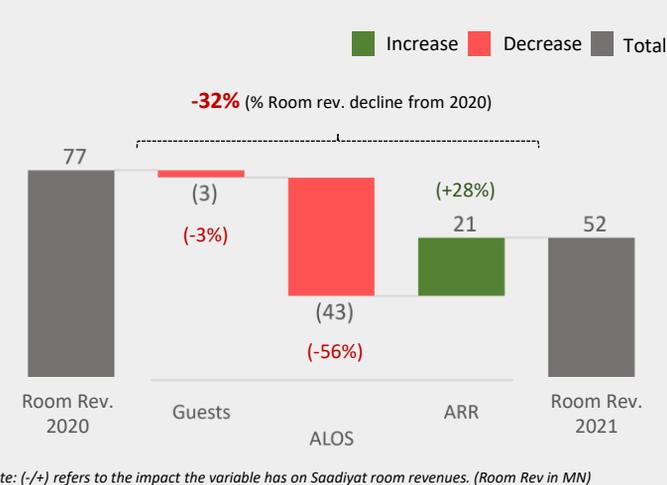
ABU DHABI CITY – YTD MAR 2021



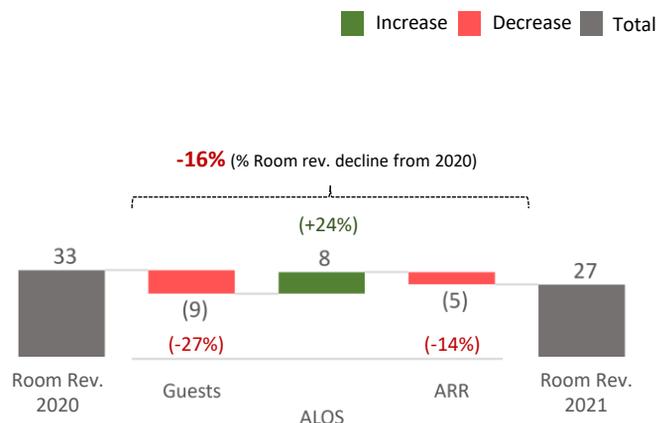
YAS ISLAND – YTD MAR 2021



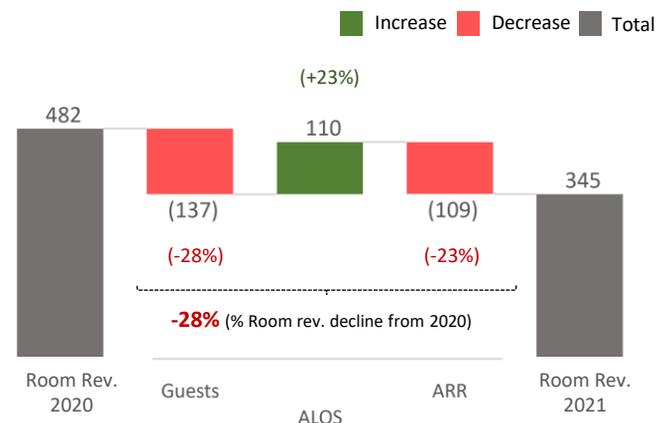
SAADIYAT ISLAND – YTD MAR 2021



ADNEC – YTD MAR 2021



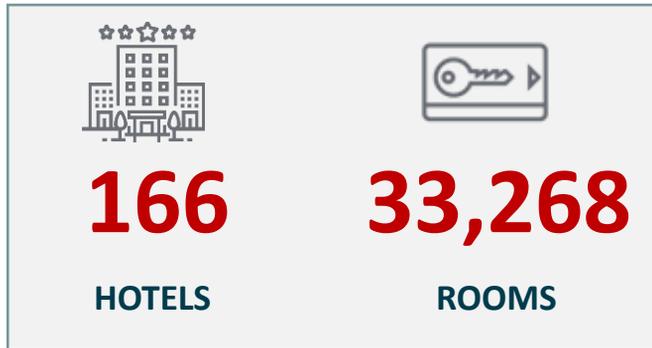
ABU DHABI ISLAND – YTD MAR 2021



HOTEL SUPPLY

AS OF 31ST MAR 2021

HOTEL SUPPLY AS OF 31ST March 2021



CLASS	5 STAR	4 STAR	3-1 STAR	APTS
	55 HOTELS 15,748 ROOMS	38 HOTELS 7,987 ROOMS	32 HOTELS 4,337 ROOMS	41 HOTELS 5,196 ROOMS

AD ZONES	YAS ISLAND	SAADIYAT & NICHE	ADNEC	AD ISLAND
	8 HOTELS 2,804 ROOMS	6 HOTELS 1,755 ROOMS	6 HOTELS 1,827 ROOMS	115 HOTELS 22,961 ROOMS

Quarantine Hotels: Nine hotels were used for quarantine purposes for the entire month of March. These hotels accounted for 6% of the total room supply in March (2,021 rooms). Since Apr 1, Radisson Abu Dhabi was removed from the list, after being re-used as a quarantine hotel since mid Jan 2021.

Temporary Closed Hotels: In March, 3 hotels (484 rooms) continue to suspend their operations for the entire month. As of Apr 13, these 3 hotels (Strand, Golden Tulip Al Jazira & Centro Yas) have remained temporarily closed

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

Disclaimer:

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