دائرة الثقافة والسياحة
**DEPARTMENT OF CULTURE
AND TOURISM**

ABU DHABI
HOTEL PERFORMANCE
REPORT

MARCH 2023

ABU DHABI HOTEL PERFORMANCE
MARCH 2023

OVERALL PERFORMANCE – MAR 2023

Mar 2023 Performance	Hotel Guests	Hotel Occupancy	Hotel ALOS	ARR (AED)	REVPAR (AED)	Revenues (AED)
	408K	72%	2.8 Nights	434	314	545M
% Change vs 2022	+13%	-5%	-9%	+16%	+10%	+10%

HOTEL GUEST NATIONALITIES – MAR 2023

Guest Rank	Guests in Thousands		Vs 2022	2023 Share
#1	UAE	79	-27%	19%
#2	India	44	+29%	11%
#3	Russia	18	+272%	4%
#4	UK	18	+23%	4%
#5	Egypt	14	+5%	3%
#6	Philippines	13	-1%	3%
#7	KSA	13	+9%	3%
#8	USA	12	+6%	3%
#9	China	9	+331%	2%
#10	Germany	9	+13%	2%
#11	Israel	8	+16%	2%

TOP 10 NON-UAE NATIONALITIES **39%** OF TOTAL HOTEL GUESTS
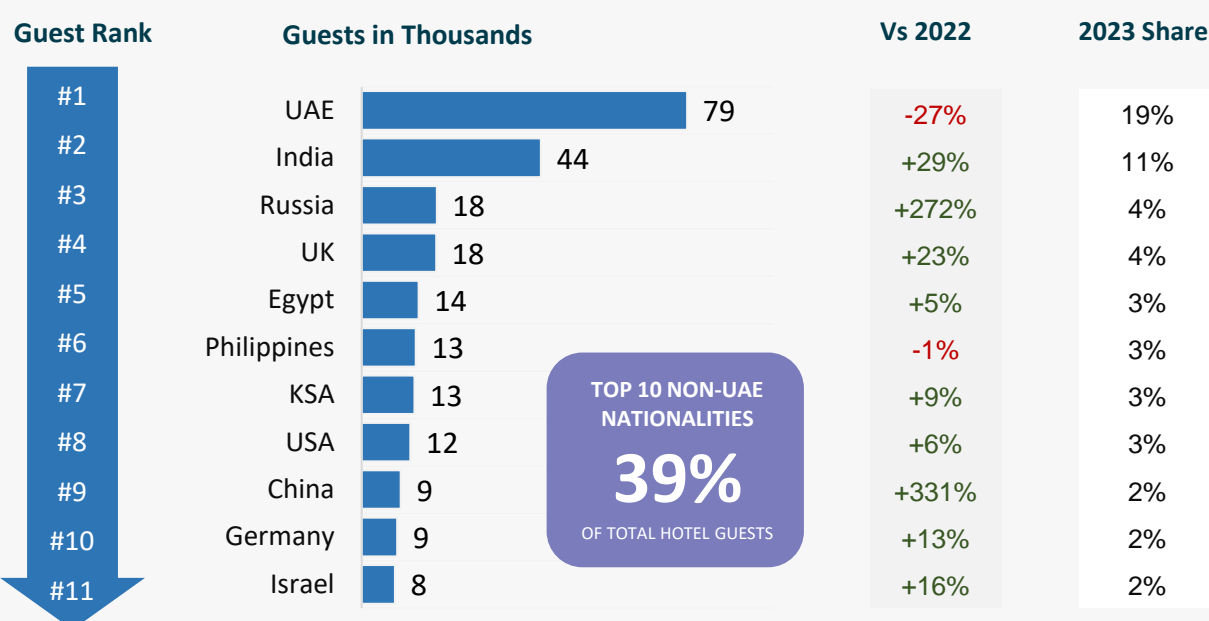
ALOS ACROSS TOP NATIONALITIES – MAR 2023

Legend: 2022, 2023

Nationality	2022	2023
UAE	2.2	2.1
India	3.9	2.6
Russia	4.9	4.6
UK	4.1	3.9
Egypt	3.4	3.4
Philippines	4.3	2.0
KSA	2.1	2.1
USA	4.0	3.6
China	6.0	2.4
Germany	4.4	4.4
Israel	1.9	2.4
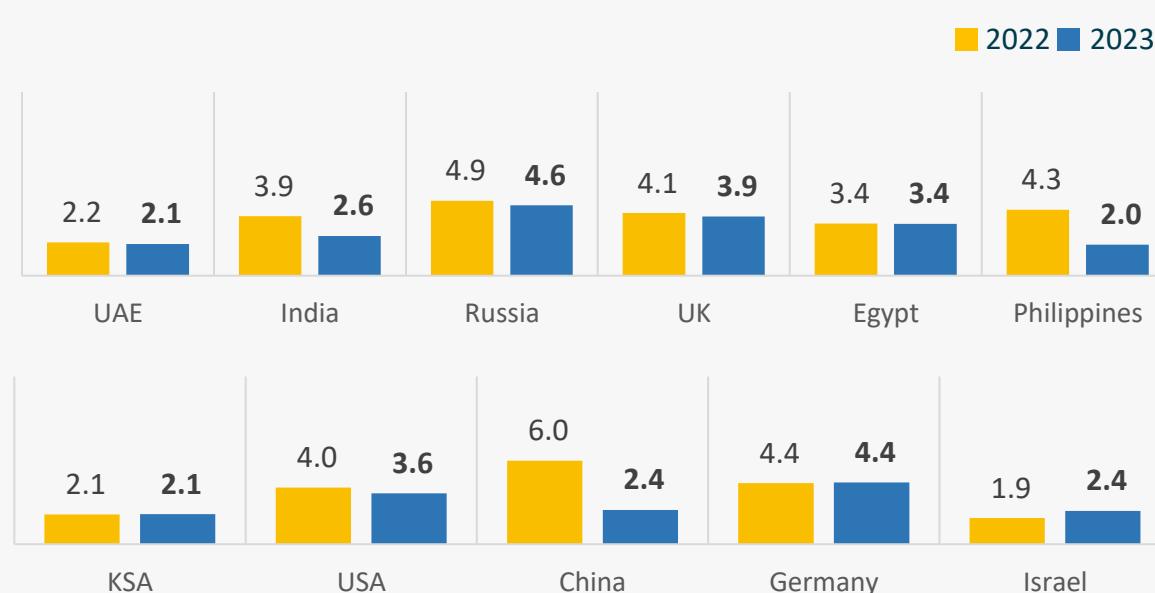
Notes: Excludes Unspecified nationalities, which represents ~6% of total guest volumes in Mar 2023 & 2022

PERFORMANCE BY REGIONS – MAR 2023

MAR 2023	ABU DHABI		AL AIN		AL DHAFRA	
Key Indicators	Actuals	% Change vs. 2022	Actuals	% Change vs. 2022	Actuals	% Change vs. 2022
Guests (K)	371	+17%	27	-16%	10	-10%
Occupancy	75%	-3%	53%	-23%	43%	-30%
ALOS (Nights)	2.9	-9%	1.9	-8%	2.6	-16%
Total Rev(M AED)	504	+12%	18	-16%	23	+1%
ARR (AED)	434	+15%	285	+7%	697	+34%
REVPAR (AED)	327	+12%	152	-17%	297	-6%

Notes: Guest & revenue values are rounded off to their nearest value

PERFORMANCE BY STAR-RATINGS – MAR 2023

MAR 2023	5-STAR HOTELS		4-STAR HOTELS		1-3 STAR HOTELS		HOTEL APARTMENTS	
Key Indicators	Actuals	% Change vs. 2022	Actuals	% Change vs. 2022	Actuals	% Change vs. 2022	Actuals	% Change vs. 2022
Guests (K)	189	+17%	121	+12%	62	+11%	36	+5%
Occupancy	70%	-3%	75%	-9%	66%	-10%	80%	-6%
ALOS (Nights)	2.9	-5%	2.2	-12%	1.9	-14%	5.4	-8%
Total Rev(M AED)	404	+15%	71	-4%	27	-4%	44	-3%
ARR (AED)	647	+20%	242	+4%	216	+12%	297	+3%
REVPAR (AED)	451	+17%	183	-5%	143	+1%	238	-3%

Notes: Guest & revenue values are rounded off to their nearest value

YTD MAR 2023 PERFORMANCE

OVERALL PERFORMANCE – YTD MAR 2023

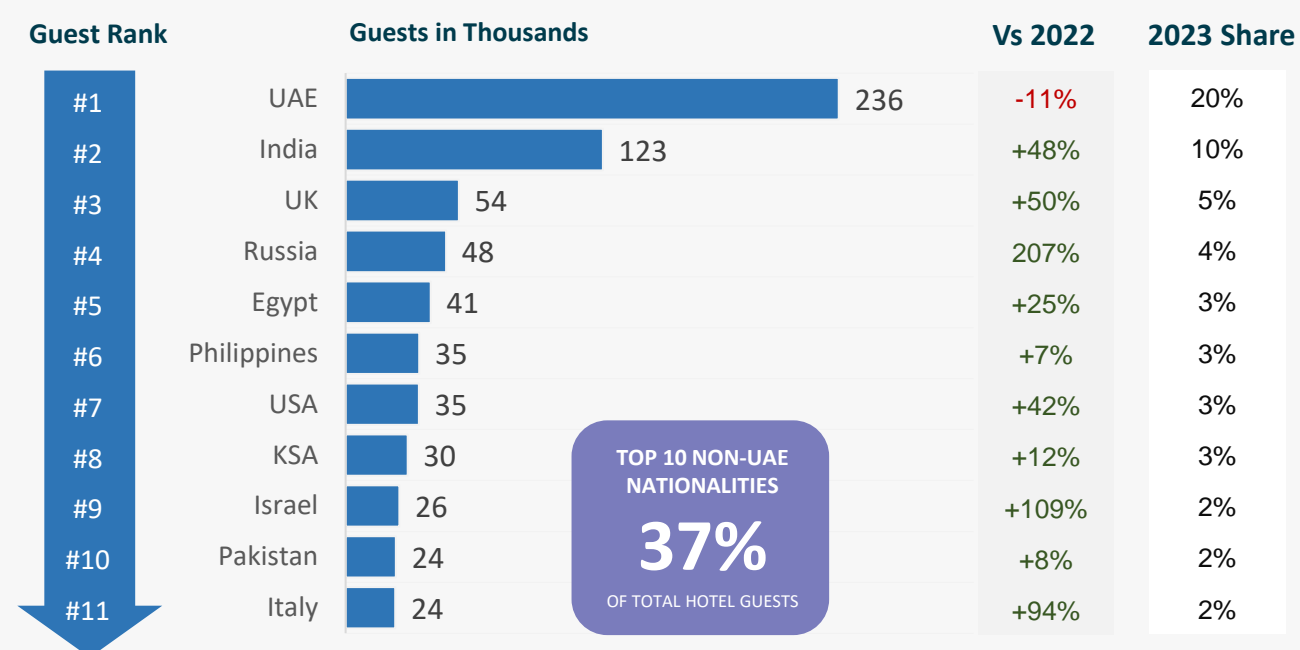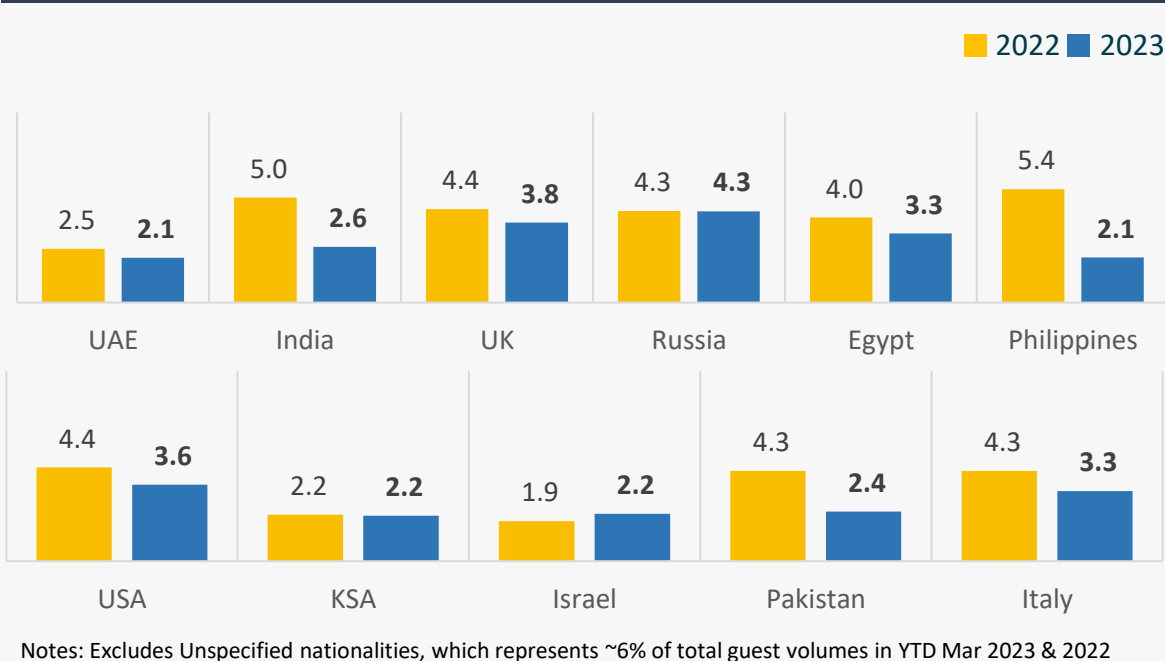| YTD Mar 2023 Performance	Hotel Guests	Hotel Occupancy	Hotel ALOS	ARR (AED)	REVPAR (AED)	Revenues (AED)
	1,182K	74%	2.8 Nights	468	346	1,700M
% Change vs 2022	+34%	-5%	-22%	+33%	+27%	+28%
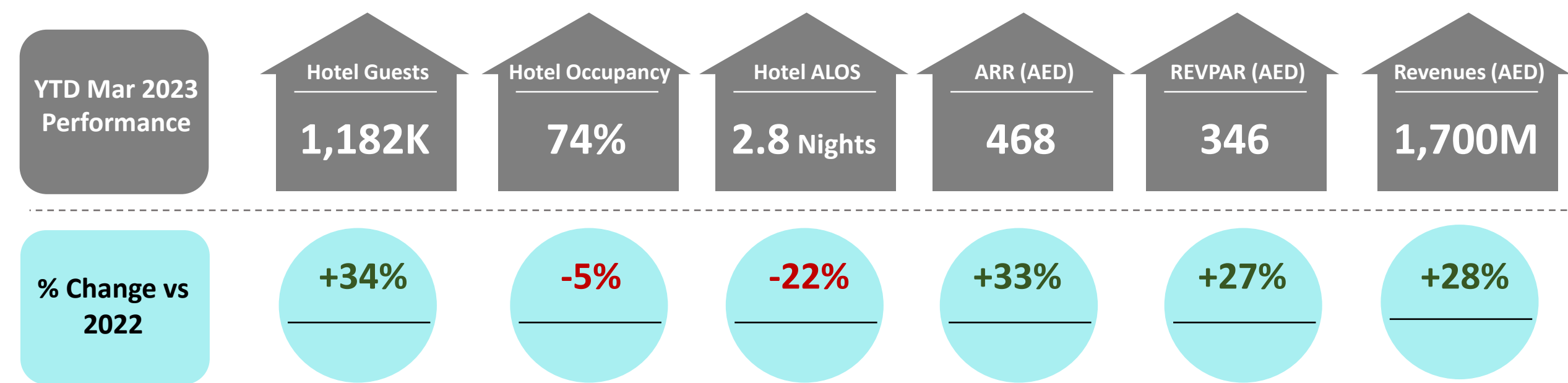
HOTEL GUEST NATIONALITIES – YTD MAR 2023

Guest Rank	Nationality	Guests in Thousands	Vs 2022	2023 Share
#1	UAE	236	-11%	20%
#2	India	123	+48%	10%
#3	UK	54	+50%	5%
#4	Russia	48	207%	4%
#5	Egypt	41	+25%	3%
#6	Philippines	35	+7%	3%
#7	USA	35	+42%	3%
#8	KSA	30	+12%	3%
#9	Israel	26	+109%	2%
#10	Pakistan	24	+8%	2%
#11	Italy	24	+94%	2%

TOP 10 NON-UAE NATIONALITIES 37% OF TOTAL HOTEL GUESTS

ALOS ACROSS TOP NATIONALTIES – YTD MAR 2023

Legend: 2022, 2023

Nationality	2022	2023
UAE	2.5	2.1
India	5.0	2.6
UK	4.4	3.8
Russia	4.3	4.3
Egypt	4.0	3.3
Philippines	5.4	2.1
USA	4.4	3.6
KSA	2.2	2.2
Israel	1.9	2.2
Pakistan	4.3	2.4
Italy	4.3	3.3

Notes: Excludes Unspecified nationalities, which represents ~6% of total guest volumes in YTD Mar 2023 & 2022

PERFORMANCE BY REGIONS –YTD MAR 2023

YTD MAR 2023	ABU DHABI		AL AIN		AL DHAFRA	
Key Indicators	Actuals	% Change vs. 2022	Actuals	% Change vs. 2022	Actuals	% Change vs. 2022
Guests (K)	1,067	+38%	82	+9%	32	+11%
Occupancy	76%	-3%	60%	-18%	44%	-28%
ALOS (Nights)	2.9	-22%	2.0	-24%	2.5	-28%
Total Rev(M AED)	1,569	+31%	57	-10%	75	+14%
ARR (AED)	471	+34%	283	+6%	755	+45%
REVPAR (AED)	360	+30%	169	-13%	331	+5%

Guest & revenue values are rounded off to their nearest value

PERFORMANCE BY STAR-RATINGS –YTD MAR 2023

YTD MAR 2023	5-STAR HOTELS		4-STAR HOTELS		1-3 STAR HOTELS		HOTEL APARTMENTS	
Key Indicators	Actuals	% Change vs. 2022	Actuals	% Change vs. 2022	Actuals	% Change vs. 2022	Actuals	% Change vs. 2022
Guests (K)	532	+37%	358	+36%	182	+36%	110	+17%
Occupancy	70%	-0.2%	78%	-8%	69%	-13%	82%	-5%
ALOS (Nights)	2.9	-17%	2.2	-26%	2.0	-30%	5.2	-18%
Total Rev(M AED)	1,232	+37%	241	+13%	90	+5%	137	+4%
ARR (AED)	693	+38%	284	+25%	240	+26%	316	+10%
REVPAR (AED)	486	+37%	221	+16%	167	+9%	259	+5%

Guest & revenue values are rounded off to their nearest value