



TABLE OF CONTENTS

01	KEY HIGHLIGHTS	<input type="radio"/>
02	HOTEL SUPPLY	<input type="radio"/>
03	HOTEL GUESTS	<input type="radio"/>
04	PERFORMANCE BY REGION	<input type="radio"/>
05	PERFORMANCE BY STAR RATING	<input type="radio"/>
06	PERFORMANCE BY ZONES	<input type="radio"/>
07	HOTEL KPI MONTHLY TRENDS	<input type="radio"/>
08	EVENTS	<input type="radio"/>
09	GLOSSARY	<input type="radio"/>



KEY HIGHLIGHTS



Q4 2019

HOTEL GUESTS

1.3 M

▲ +0.04%
(FROM Q4 2018)

HOTEL OCCUPANCY

80%

▲ +2.1%
(FROM Q4 2018)

HOTEL REVENUES

1.8 B

▲ +3.4%
(FROM Q4 2018)

ALOS (NIGHTS)

2.7

▲ +1.4%
(FROM Q4 2018)

FIULL YEAR 2019

5.1 M

▲ +2.1%
(FROM 2018)

73%

▲ +1.6%
(FROM 2018)

5.8 B

▲ +6.6%
(FROM 2018)

2.6

▲ +1.8%
(FROM 2018)

Q4 2019

FULL YEAR 2019

Other Key Indicators
(AED)

Actual

% Change vs
Previous Year

Actual

% Change vs
Previous Year

Hotel ARR

432

+1.3%

369

+4.7%

Hotel REVPAR

344

+3.4%

269

+6.4%

Room Revenues

1,023 M

+3.3%

3,189 M

+10.5%

F&B Revenues

637 M

+6.6%

2,021 M

+4.9%

Other Revenues

174 M

-5.9%

615 M

-5.6%

HOTEL SUPPLY

Q4 2019



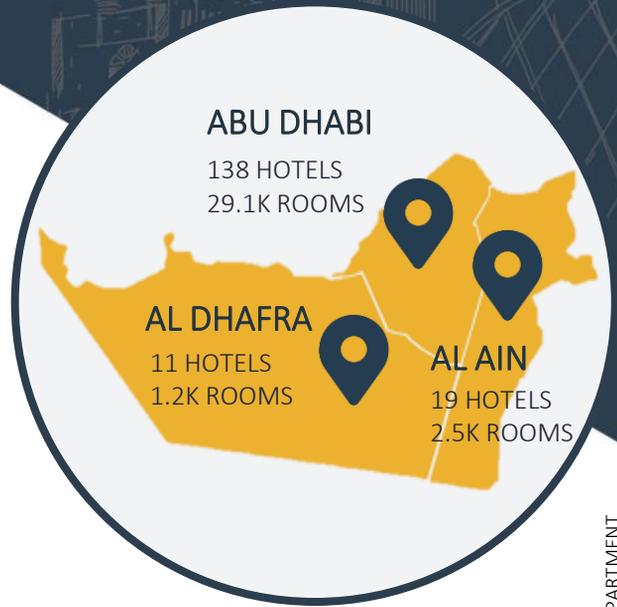
168

HOTELS



32.8K

ROOMS



STAR RATING	5 STAR	4 STAR	1-3 STAR	APTS
	54 HOTELS 15.0K ROOMS	36 HOTELS 7.6K ROOMS	33 HOTELS 4.5K ROOMS	45 HOTELS 5.7K ROOMS

SOURCE: DCT LICENSING DEPARTMENT

SUPPLY ADDITIONS & CLOSURES IN 2019



OPENED: FEB 2019

JUMERIAH AL WATBHA
KHALIFA & OUTSKIRTS
TYPE: 5 STAR
ROOMS: 103



CLOSED: APR 2019

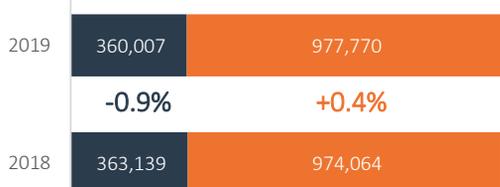
AL SHUROOQ APTS
CORNICHE & LULU
TYPE: STANDARD
ROOMS: 32

HOTEL GUESTS

Q4 2019

1,337,777

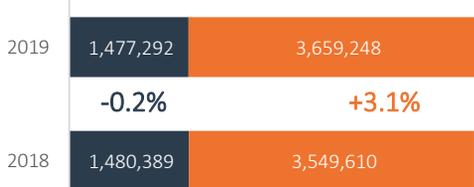
▲ +0.04% FROM Q4 2018



FULL YEAR 2019

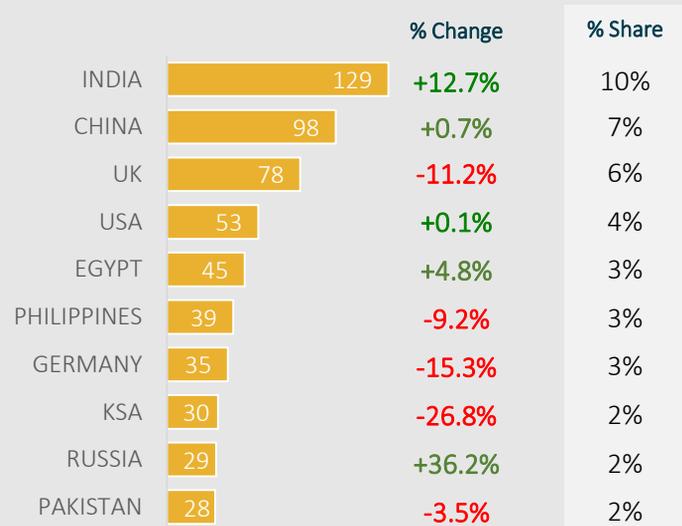
5,136,540

▲ +2.1% FROM 2018

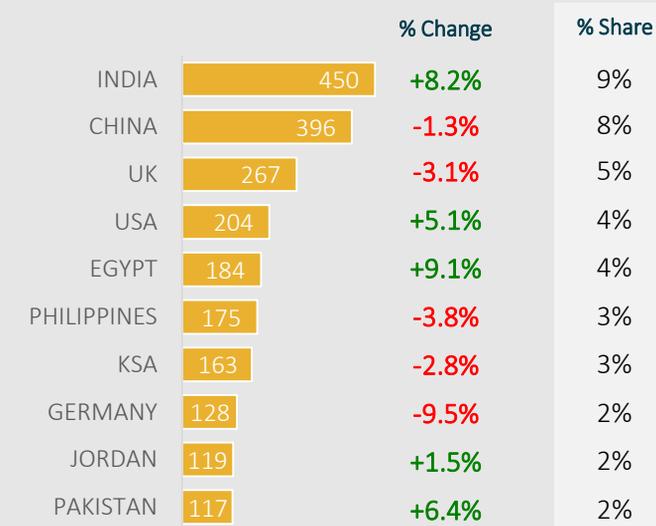


*UAE refers to UAE citizens

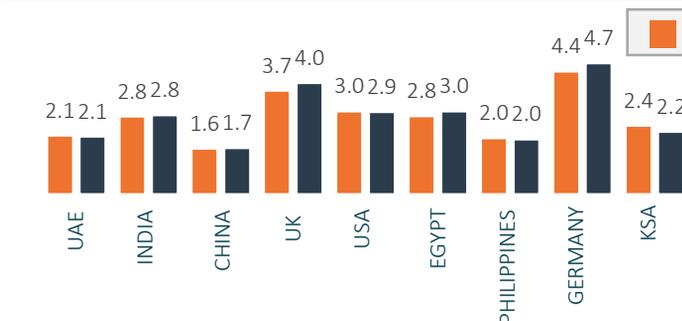
TOP NON-UAE NATIONALITIES (000) – Q4 2019



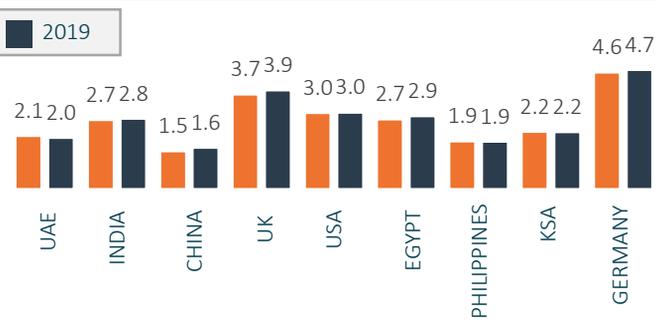
TOP NON-UAE NATIONALITIES (000) – FULL YEAR 2019



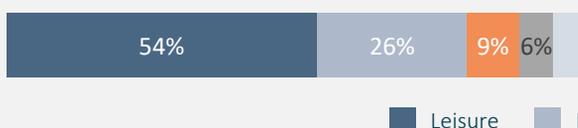
ALOS (NIGHTS) – Q4 2019



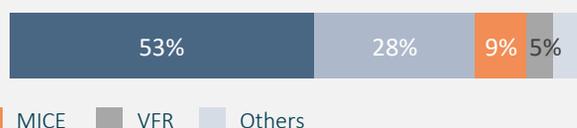
ALOS (NIGHTS) – FULL YEAR 2019



PURPOSE OF VISIT – Q4 2019



PURPOSE OF VISIT – FULL YEAR 2019



Legend: Leisure (Dark Blue), Business (Light Blue), MICE (Orange), VFR (Grey), Others (Lightest Blue)

PERFORMANCE BY REGION

Q4 2019	ABU DHABI		AL AIN		AL DHAFRA	
Key Indicators	Actual	% Change vs Previous Year	Actual	% Change vs Previous Year	Actual	% Change vs Previous Year
GUESTS	1,164,501	-0.6%	134,988	+6.4%	38,288	-1.9%
OCCUPANCY RATE	82%	+2.2%	64%	-3.0%	57%	+3.9%
ALOS (NIGHTS)	2.8	+3.0%	1.7	-11.9%	2.2	-11.3%
REVENUES (M AED)	1,688	+4.6%	75	-9.5%	72	-7.7%
ARR (AED)	436	+2.1%	264	-12.6%	757	+2.9%
REVPAR (AED)	356	+4.3%	169	-15.2%	433	+6.8%

TOP NATIONALITIES Q4 2019

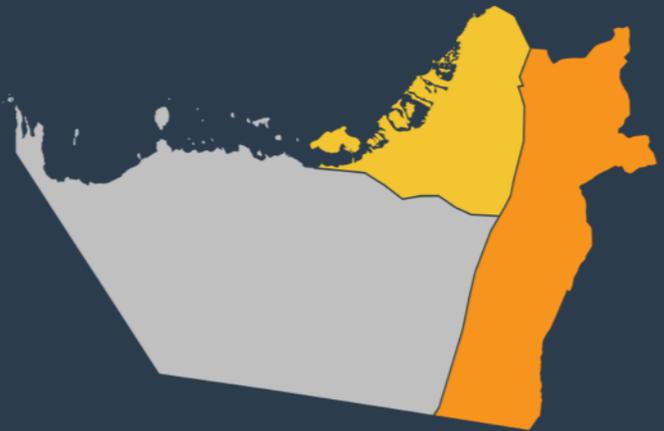
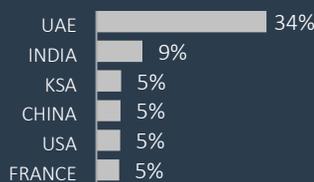
ABU DHABI



AL AIN



AL DHAFRA



FULL YEAR 2019

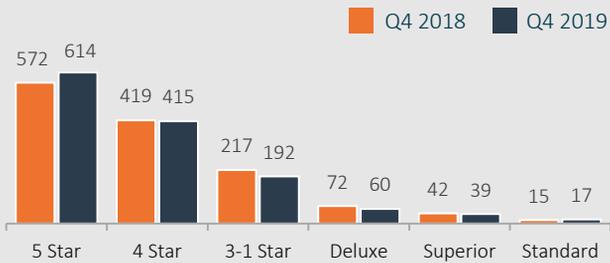
FULL YEAR 2019	ABU DHABI		AL AIN		AL DHAFRA	
Key Indicators	Actual	% Change vs Previous Year	Actual	% Change vs Previous Year	Actual	% Change vs Previous Year
GUESTS	4,499,259	+1.5%	500,322	+9.8%	136,959	-3.2%
OCCUPANCY RATE	75%	+1.3%	61%	+2.3%	47%	+3.6%
ALOS (NIGHTS)	2.7	+2.8%	1.8	-6.6%	2.1	-3.1%
REVENUES (M AED)	5,310	+7.3%	284	-4.0%	230	+5.0%
ARR (AED)	369	+5.3%	269	-6.3%	679	+10.1%
REVPAR (AED)	276	+6.6%	164	-4.2%	322	+14.1%



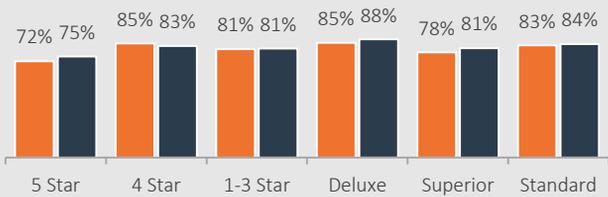
PERFORMANCE BY STAR RATING

Q4 2019

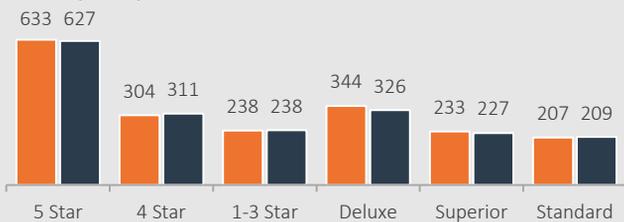
HOTEL GUESTS (000)



OCCUPANCY RATE (%)

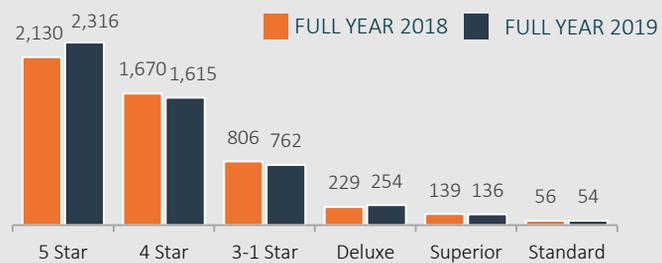


ARR (AED)

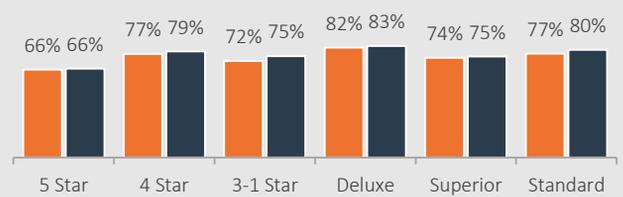


FULL YEAR 2019

HOTEL GUESTS (000)



OCCUPANCY RATE (%)

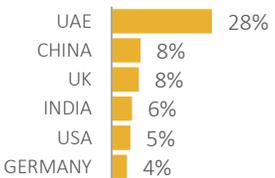


ARR (AED)



TOP NATIONALITIES – Q4 2019

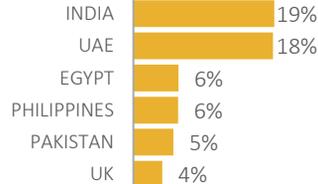
5 STAR



4 STAR



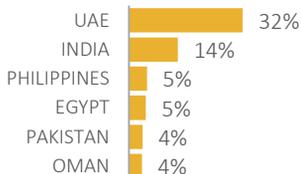
1-3 STAR



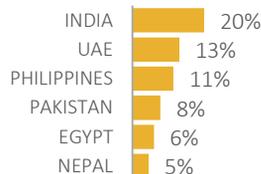
DELUXE



SUPERIOR



STANDARD



YAS ISLAND PERFORMANCE

7 HOTELS
2,259 ROOMS



STAR RATING

5 STAR

1 HOTEL
499 ROOMS

4 STAR

3 HOTELS
1,133 ROOMS

1-3 STAR

2 HOTELS
463 ROOMS

APTS

1 HOTELS
164 ROOMS

Key Indicators	Q4 2019		FULL YEAR 2019	
	Actual	% Change vs Previous Year	Actual	% Change vs Previous Year
Guests	98,465	-12.0%	418,333	-3.8%
Occupancy	79%	-6.1%	78%	+2.2%
Revenues (AED)	134 M	-5.0%	401 M	+1.4%
ALOS (Nights)	2.7	+2.2%	2.5	+2.8%
ARR (AED)	517	+3.1%	380	+2.9%
REVPAR (AED)	408	-3.1%	297	+5.2%

TOP NATIONALITIES (000) – Q4 2019

Nationality	Count (000)	% Change	% Share
INDIA	18.0	+6.9%	18%
UAE	17.8	-26.6%	18%
UK	10.7	-15.4%	11%
CHINA	4.4	-31.0%	4%
USA	4.4	+17.6%	4%
KSA	2.9	-37.6%	3%
GERMANY	2.4	-13.5%	2%
PHILIPPINES	2.3	-14.1%	2%
S.AFRICA	2.1	-3.2%	2%
AUSTRALIA	1.9	+1.4%	2%
EGYPT	1.9	-21.6%	2%

TOP NATIONALITIES (000) – FULL YEAR 2019

Nationality	Count (000)	% Change	% Share
UAE	96.6	-15.7%	23%
INDIA	56.5	+10.7%	14%
UK	34.9	-10.4%	8%
CHINA	26.2	-23.9%	6%
KSA	23.0	+8.3%	6%
USA	15.3	+21.9%	4%
PHILIPPINES	13.5	+8.3%	3%
EGYPT	10.3	-2.1%	2%
KUWAIT	8.2	+57.8%	2%
PAKISTAN	7.9	+18.0%	2%
JORDAN	7.7	-6.8%	2%

SAADIYAT & NICHE AREAS PERFORMANCE



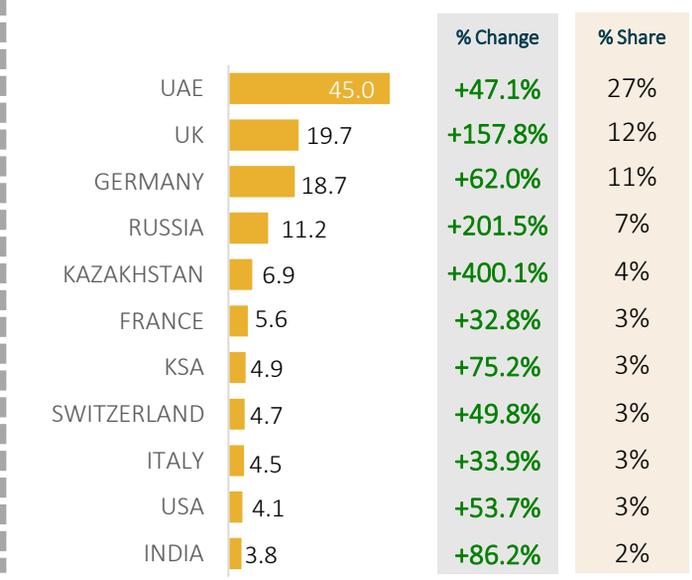
STAR RATING	5 STAR	4 STAR	1-3 STAR	APTS
	6 HOTELS 1,755 ROOMS	----	----	----

PERFORMANCE	Q4 2019		FULL YEAR 2019	
	Actual	% Change vs Previous Year	Actual	% Change vs Previous Year
Key Indicators				
Guests	41,088	+35.1%	165,436	+73.6%
Occupancy	69%	+20.4%	63%	+14.7%
Revenues (AED)	246 M	+27.7%	711 M	+50.3%
ALOS (Nights)	4.4	-0.6%	4.2	+2.5%
ARR (AED)	1,180	-13.6%	1,032	-7.9%
REVPAR (AED)	813	+4.0%	647	+5.7%

TOP NATIONALITIES (000) – Q4 2019

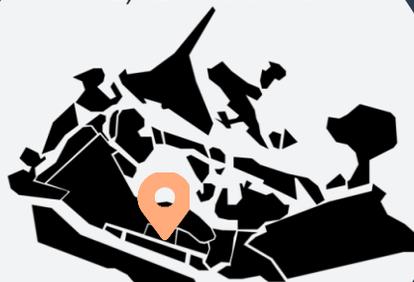


TOP NATIONALITIES (000) – FULL YEAR 2019



ADNEC PERFORMANCE

6 HOTELS
1,827 ROOMS



STAR RATING

5 STAR

1 HOTEL
189 ROOMS

4 STAR

2 HOTELS
723 ROOMS

1-3 STAR

2 HOTELS
656 ROOMS

APTS

1 HOTELS
259 ROOMS

PERFORMANCE

Q4 2019

FULL YEAR 2019

Key Indicators

Actual

% Change vs
Previous Year

Actual

% Change vs
Previous Year

Guests

75,169

+0.3%

305,257

+9.4%

Occupancy

89%

+2.3%

83%

+9.9%

Revenues (AED)

67 M

+12.5%

209 M

+22.7%

ALOS (Nights)

3.0

-7.8%

3.1

+1.6%

ARR (AED)

328

+9.0%

276

+10.4%

REVPAR (AED)

292

+11.5%

229

+21.3%

TOP NATIONALITIES (000) – Q4 2019

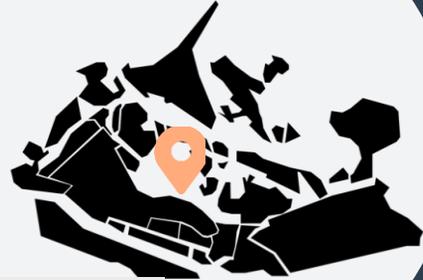
Nationality	Count (000)	% Change	% Share
UAE	25.9	+6.1%	34%
CHINA	6.6	+23.3%	9%
INDIA	4.4	+2.9%	6%
UK	3.3	+4.3%	4%
USA	2.5	+20.4%	3%
EGYPT	2.5	-4.3%	3%
PHILIPPINES	2.2	-23.5%	3%
PAKISTAN	1.9	-7.5%	3%
KSA	1.8	-42.1%	2%
JORDAN	1.6	-22.4%	2%
VIETNAM	1.4	+71.8%	2%

TOP NATIONALITIES (000) – FULL YEAR 2019

Nationality	Count (000)	% Change	% Share
UAE	108.3	+8.0%	35%
CHINA	22.1	+4.3%	7%
INDIA	19.0	+15.3%	6%
EGYPT	12.2	+18.1%	4%
PHILIPPINES	11.8	+5.1%	4%
KSA	10.5	-2.1%	3%
UK	10.1	+16.6%	3%
USA	9.0	+36.6%	3%
JORDAN	8.5	-6.0%	3%
PAKISTAN	8.0	+0.8%	3%
GERMANY	4.5	-14.4%	1%

ABU DHABI ISLAND* PERFORMANCE

119 HOTELS
23,301 ROOMS



STAR RATING

5 STAR

36 HOTELS
11,169 ROOMS

4 STAR

22 HOTELS
4,637 ROOMS

1-3 STAR

22 HOTELS
2,619 ROOMS

APTS

39 HOTELS
4,876 ROOMS

*Includes Corniche, Marina, Bateen, Al Markaziyah, Al Zahiya, Al Maryah Island, Al Reem Island, Al Maqtaa Creek, Al Gurm Corniche, Zayed Sports City and Khalifa City & Raha Beach

PERFORMANCE	Q4 2019		FULL YEAR 2019	
	Actual	% Change vs Previous Year	Actual	% Change vs Previous Year
Key Indicators				
Guests	949,779	-0.4%	3,610,233	-0.4%
Occupancy	82%	+2.3%	75%	+0.4%
Revenues (AED)	1,242 M	+1.7%	3,989 M	+2.0%
ALOS (Nights)	2.8	+3.6%	2.6	+1.6%
ARR (AED)	391	+1.1%	335	+2.1%
REVPAR (AED)	322	+3.4%	251	+2.5%

TOP NATIONALITIES (000) – Q4 2019

Nationality	Count (000)	% Change	% Share
UAE	230.5	-1.7%	24%
INDIA	92.1	+13.0%	10%
CHINA	83.1	+3.1%	9%
UK	54.2	-15.1%	6%
USA	41.9	-2.8%	4%
EGYPT	35.0	+3.8%	4%
PHILIPPINES	29.9	-9.5%	3%
GERMANY	24.4	-21.6%	3%
RUSSIA	21.5	+35.7%	2%
PAKISTAN	21.3	-2.7%	2%
JORDAN	20.2	-3.5%	2%

TOP NATIONALITIES (000) – FULL YEAR 2019

Nationality	Count (000)	% Change	% Share
UAE	949.4	-2.7%	26%
INDIA	328.9	+5.9%	9%
CHINA	328.5	+0.8%	9%
UK	187.3	-7.9%	5%
USA	161.8	+1.3%	4%
EGYPT	141.1	+8.7%	4%
PHILIPPINES	133.3	-6.4%	4%
KSA	98.7	-6.1%	3%
PAKISTAN	88.2	+5.4%	2%
GERMANY	87.0	-17.9%	2%
JORDAN	85.8	+1.1%	2%

HOTEL KPI

MONTHLY TRENDS

HOTEL GUESTS (000)

2019 2018

+2.9%



OCCUPANCY RATE

-2.1%



AVERAGE LENGTH OF STAY (ALOS - NIGHTS)

-4.9%



HOTEL TOTAL REVENUES (MILLION UAE)

+2.0%



AVERAGE ROOM RATE (ARR - AED)

+4.5%



REVENUE PER AVAILABLE ROOM (REVPAR - AED)

+2.3%



EVENTS

KEY Q4 2019 EVENTS



DU EMINEM CONCERT

25th Oct

Yas Island



ADIPEC 2019

11th - 14th Nov

ADNEC



F1 ABU DHABI

28th Nov – 1st Dec

Yas Island



BRUNO MARS LIVE

31st Dec

Yas Island

KEY UPCOMING EVENTS – Q1 2020



AD SUSTAINABILITY WEEK

11th – 18th Jan

Saadiyat, ADNEC,
Masdar City



WORLD ENERGY SUMMIT

13th – 16th Jan

ADNEC



HSBC GOLF CHAMPIONSHIP

16th – 20th Jan

Abu Dhabi Island



CHINESE NEW YEAR

17th Jan – 2nd Feb

Yas & AD Island



WINTER CONSUMER FAIR

23th Jan – 10th Feb

Al Ain



ABU DHABI CLASSICS

28th Jan – 7th Feb

Abu Dhabi Island



ULTRA MUSIC FESTIVAL

5th - 6th Mar

Yas Island



VIDCON ABU DHABI 2020

25th - 28th Mar

ADNEC

GLOSSARY

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:

- All rights are reserved regarding the data contained in the Department of Culture and Tourism – Abu Dhabi (DCT Abu Dhabi) attached report.
- The content and data included in the report are subject to alteration with the emergence of more accurate data or the acquisition of the full required data, in accordance with the requirements of the data updating process or audit conducted in accordance with UAE legislation and procedures.
- DCT Abu Dhabi shall not be held accountable to the requestor or any other parties regarding alterations made to the data or information contained in this report as a result of the updating process, the conducted audit, the emergence of new data obtained from partners' overseas sources, or in any other case.