ABU DHABI

HOTEL PERFORMANCE REPORT

DECEMBER & FULL YEAR 2020

دائرة الثقافة والسياحة
DEPARTMENT OF CULTURE AND TOURISM

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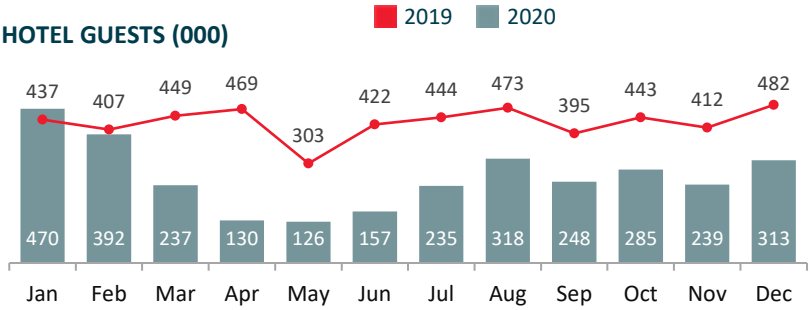
OVERALL PERFORMANCE

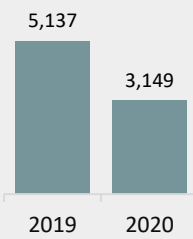
DECEMBER 2020

HOTEL GUESTS (000)



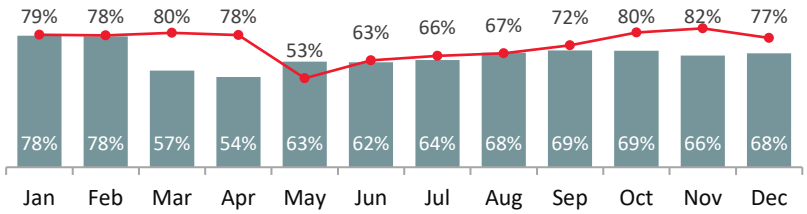
% Change (Dec 2020): -35.0%

YTD (JAN- DEC)

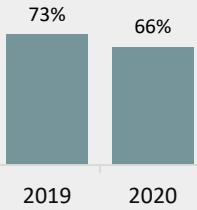


From Previous Year: -38.7%

OCCUPANCY RATE

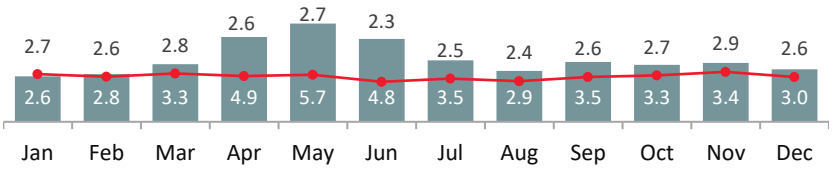


-12.0%

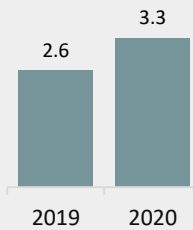


-9.1%

AVERAGE LENGTH OF STAY (ALOS-NIGHTS)

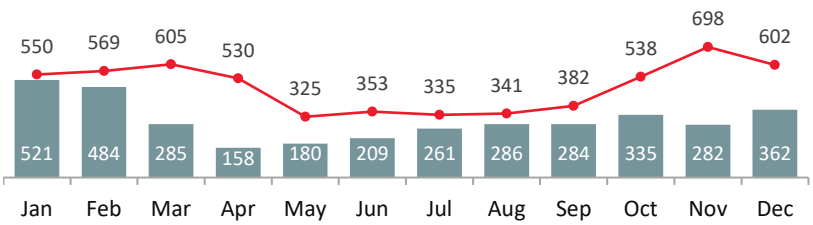


+17.0%

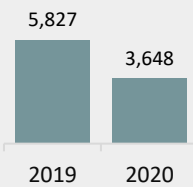


+27.9%

HOTEL TOTAL REVENUE (MILLION AED)

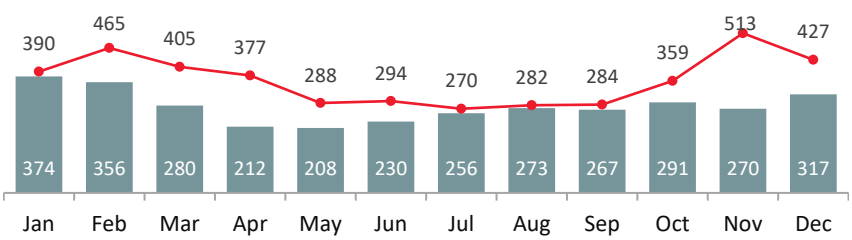


-39.9%

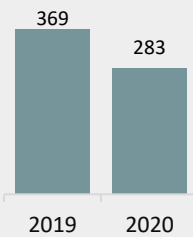


-37.4%

AVERAGE ROOM RATE (AED)

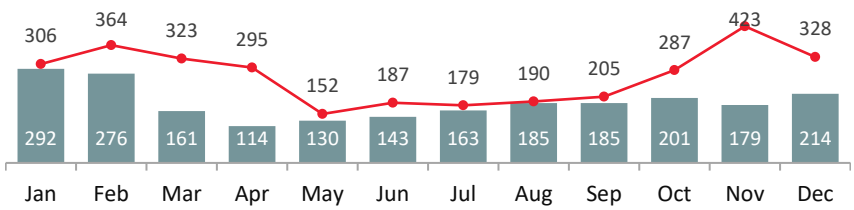


-25.9%

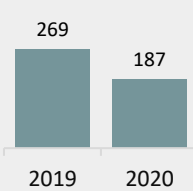


-23.3%

REVENUE PER AVAILABLE ROOM (AED)



-34.8%



-30.3%

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HOTEL GUESTS BY NATIONALITY

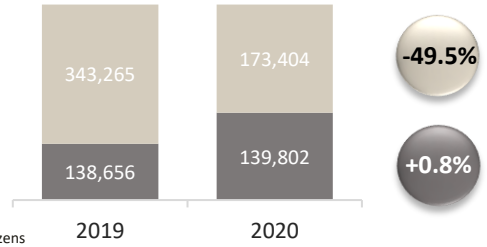
DECEMBER 2020

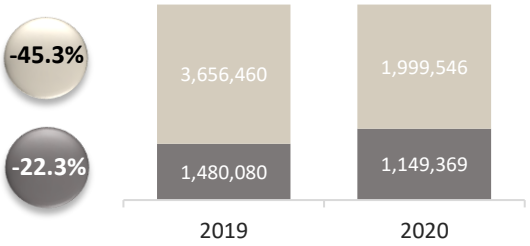
UAE VS. NON-UAE HOTEL GUESTS

313,206 TOTAL

-35.0% From Previous Year

*UAE refers to UAE citizens

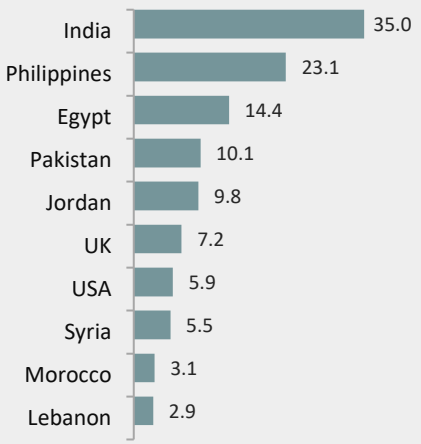




3,148,915 TOTAL

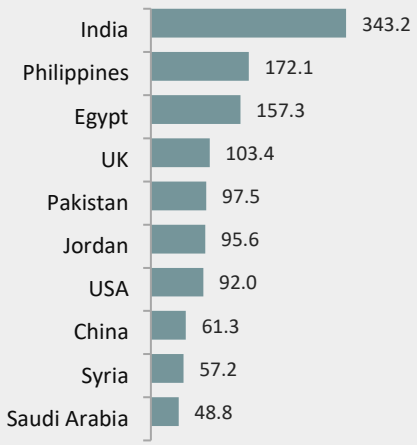
-38.7% From Previous Year

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



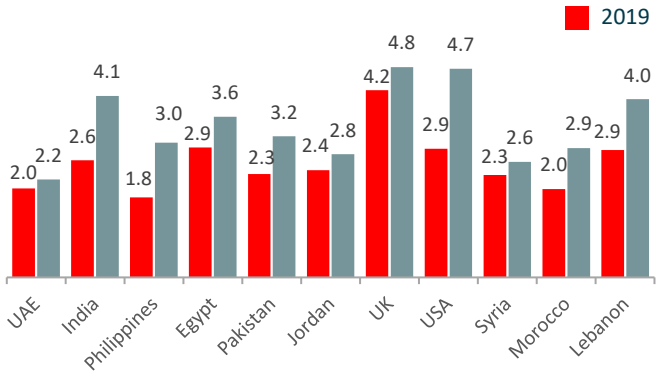
	% Change	% Share
India	-27.6%	11.2%
Philippines	50.2%	7.4%
Egypt	-5.9%	4.6%
Pakistan	3.6%	3.2%
Jordan	-3.4%	3.1%
UK	-67.4%	2.3%
USA	-66.0%	1.9%
Syria	-1.9%	1.8%
Morocco	-33.2%	1.0%
Lebanon	-31.5%	0.9%

TOP 10 NON-UAE NATIONALITIES (000s) FULL YEAR 2020

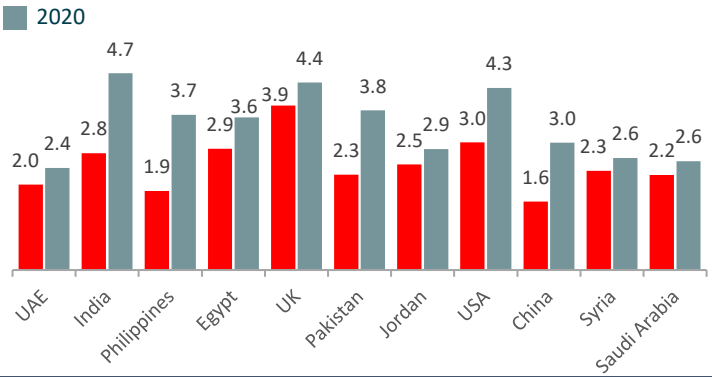


	% Change	% Share
India	-23.7%	10.9%
Philippines	-1.8%	5.5%
Egypt	-14.7%	5.0%
UK	-61.4%	3.3%
Pakistan	-16.9%	3.1%
Jordan	-19.5%	3.0%
USA	-55.0%	2.9%
China	-84.5%	1.9%
Syria	-16.0%	1.8%
Saudi Arabia	-70.0%	1.5%

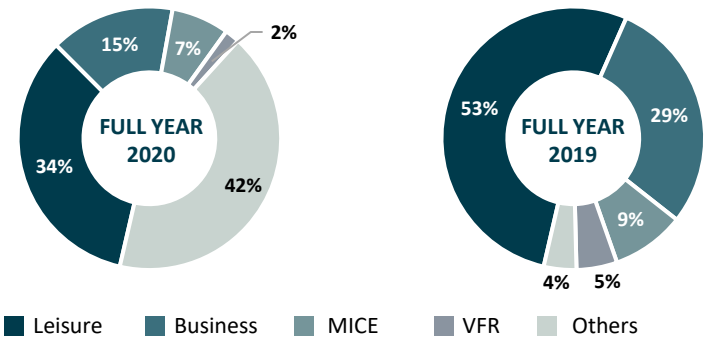
ALOS (NIGHTS) – DEC 2020



ALOS (NIGHTS) – FULL YEAR 2020



PURPOSE OF VISIT– FULL YEAR 2020 VS FULL YEAR 2019



Notes:

- Leisure segment is focused on recreation, entertainment, sports, shopping etc.
- Business segment refers to guests visiting the Emirate for corporate/company/project work, standalone business visits etc.
- MICE refers to guests visiting the Emirate for pre-organized MICE events (Meetings, Incentive trips, Conferences & Exhibitions)
- VFR refers to guests visiting the Emirate whose main purpose is to visit friends & family
- In 2020, "Others" largely refers to private & public companies accommodating their employees in the hotels due to COVID-19 related purposes (For example, Medical/Healthcare centers, Oil & Gas companies).
- The purpose of visit analysis is based on a sample of hotels (149 hotels)

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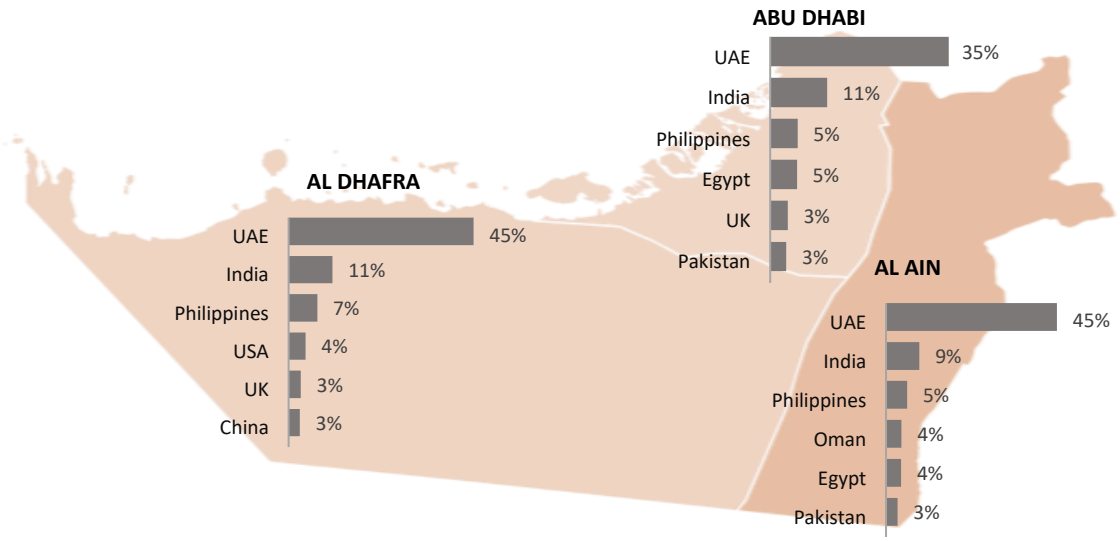
PERFORMANCE BY REGION

DECEMBER 2020

REGIONAL PERFORMANCE – DEC 2020

KEY INDICATORS	ABU DHABI		AL AIN		AL DHAFRA	
	Actual	% Change	Actual	% Change	Actual	% Change
GUESTS	258,402	-37.9% ▼	38,502	-24.9% ▼	16,302	11.9% ▲
OCCUPANCY RATE	67%	-13.8% ▼	74%	11.5% ▲	60%	-0.6% ▼
ALOS DAYS	3.2	17.5% ▲	2.2	30.8% ▲	2.4	13.7% ▲
REVENUES (M AED)	309.8	-43.2% ▼	26.0	-6.3% ▼	26.1	-8.1% ▼
ARR (AED)	301	-29.0% ▼	319	8.6% ▲	654	-28.4% ▼
REVPAR (AED)	203	-38.8% ▼	236	21.2% ▲	393	-28.8% ▼

TOP NATIONALITIES ACROSS REGIONS – FULL YEAR 2020



REGIONAL PERFORMANCE – FULL YEAR 2020

KEY INDICATORS	ABU DHABI		AL AIN		AL DHAFRA	
	Actual	% Change	Actual	% Change	Actual	% Change
GUESTS	2,695,315	-40.1% ▼	335,745	-32.9% ▼	117,855	-13.9% ▼
OCCUPANCY RATE	67%	-11.0% ▼	64%	5.3% ▲	62%	30.0% ▲
ALOS DAYS	3.5	28.7% ▲	2.4	31.5% ▲	2.6	19.8% ▲
REVENUES (M AED)	3,190.5	-39.9% ▼	212.6	-25.4% ▼	245.0	6.4% ▲
ARR (AED)	277	-24.8% ▼	240	-11.2% ▼	551	-18.8% ▼
REVPAR (AED)	185	-33.0% ▼	154	-6.5% ▼	340	5.5% ▲

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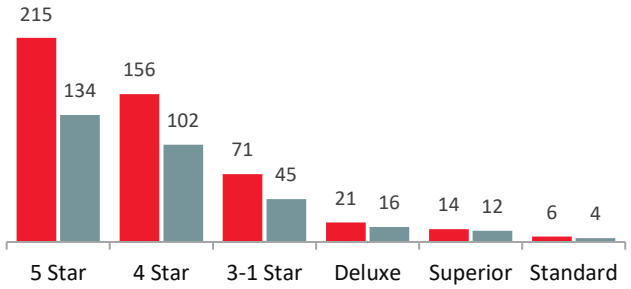
PERFORMANCE BY STAR RATING

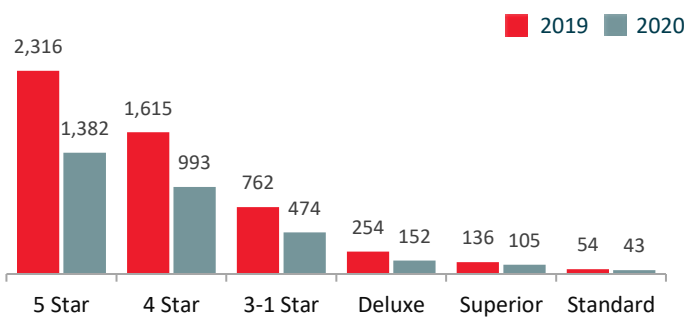
DECEMBER 2020

PERFORMANCE ACROSS KEY INDICATORS*

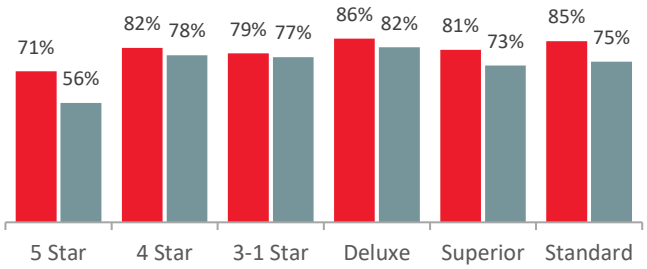
HOTEL GUESTS – DEC 2020



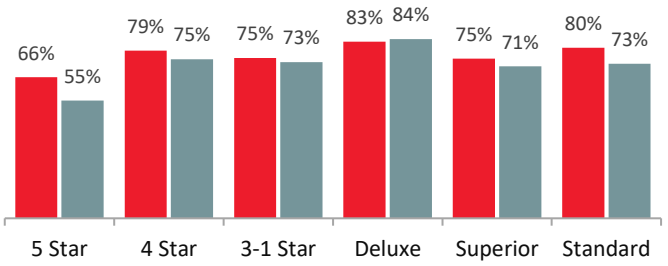
HOTEL GUESTS – FULL YEAR 2020



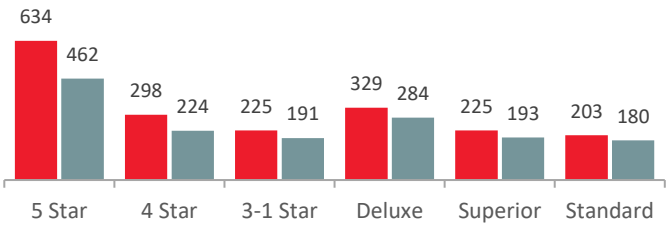
HOTEL OCCUPANCY– DEC 2020



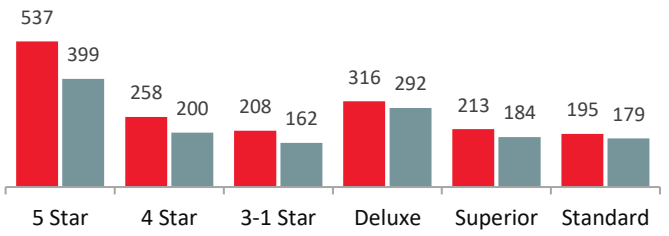
HOTEL OCCUPANCY – FULL YEAR 2020



HOTEL ARR (AED)– DEC 2020

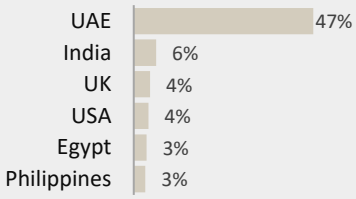


HOTEL ARR (AED) –FULL YEAR 2020

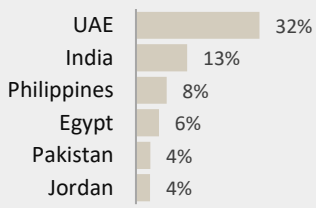


TOP NATIONALITIES – FULL YEAR 2020

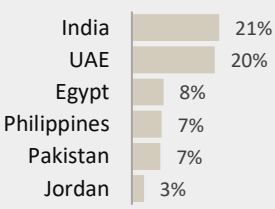
5 Star



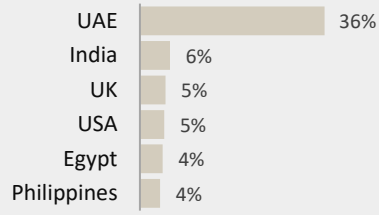
4 Star



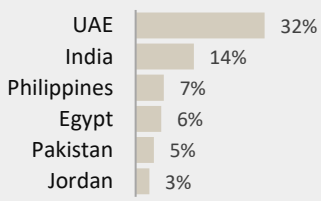
3 -1 Star



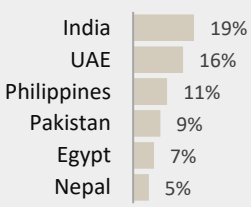
Deluxe



Superior



Standard



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

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YAS ISLAND PERFORMANCE

DECEMBER 2020

HOTEL SUPPLY

7 HOTELS

2,259 ROOMS

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

OVERALL PERFORMANCE*

KEY INDICATORS	DEC 2020 Actual	DEC 2020 % Change	FULL YEAR 2020 Actual	FULL YEAR 2020 % Change
GUESTS	13,326	-64.4% ▼	129,167	-69.1% ▼
OCCUPANCY RATE	56%	-26.4% ▼	53%	-32.7% ▼
ALOS NIGHTS	3.8	48.3% ▲	4.1	62.9% ▲
REVENUES (M AED)	33.8	-25.1% ▼	214.1	-46.6% ▼
ARR (AED)	426	-14.9% ▼	318	-16.3% ▼
REVPAR (AED)	237	-37.3% ▼	167	-43.6% ▼

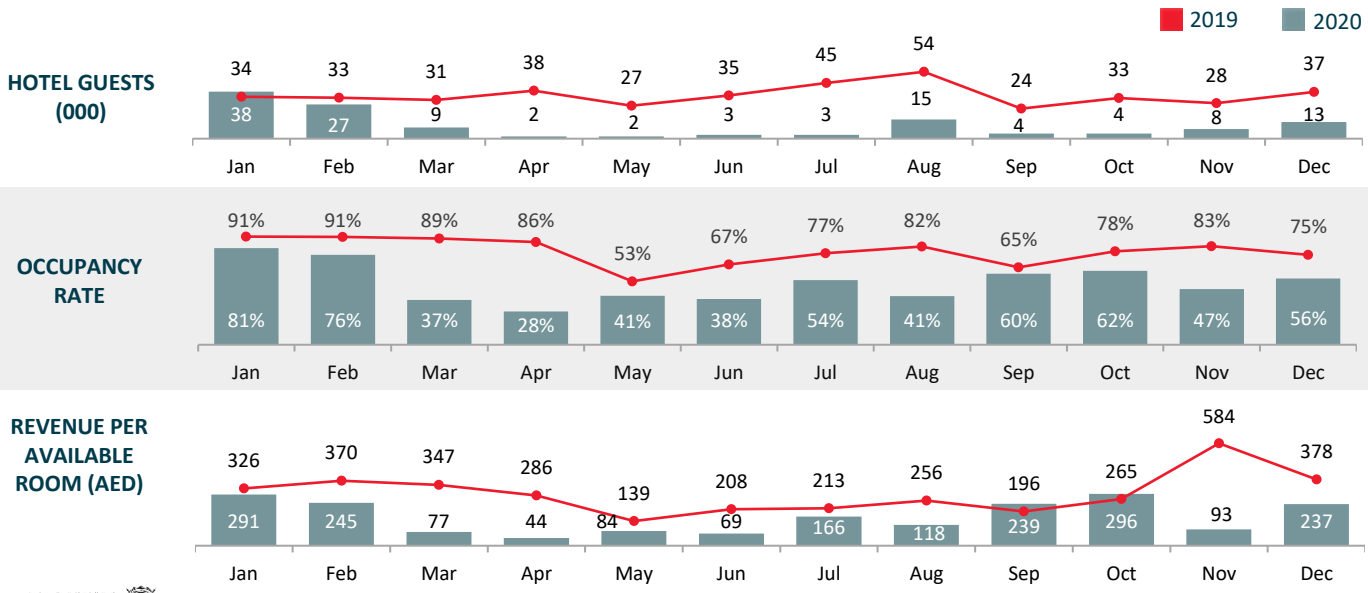
TOP NATIONALITIES (000s) – DEC 2020

		% Change	% Share
UAE	4.2	-42.1%	31.7%
Philippines	1.4	20.5%	10.6%
India	1.3	-81.6%	9.9%
UK	1.2	-61.0%	8.7%
Egypt	0.5	-32.8%	3.8%
Jordan	0.5	-31.5%	3.8%
USA	0.3	-80.4%	2.2%
Italy	0.3	-57.2%	2.0%
South Africa	0.2	-79.0%	1.8%
Pakistan	0.2	-58.3%	1.7%
Nepal	0.2	684.6%	1.5%

TOP NATIONALITIES (000s) – FULL YEAR 2020

		% Change	% Share
UAE	34.1	-64.7%	26.4%
India	15.4	-72.8%	11.9%
UK	9.2	-73.6%	7.1%
Saudi Arabia	5.8	-74.7%	4.5%
Egypt	5.4	-47.3%	4.2%
Philippines	5.2	-61.2%	4.1%
USA	4.7	-69.5%	3.6%
China	4.1	-84.2%	3.2%
Jordan	3.4	-56.0%	2.6%
Pakistan	2.6	-66.5%	2.1%
South Africa	2.1	-68.8%	1.6%

MONTHLY TRENDS



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SAADIYAT & NICHE AREAS PERFORMANCE

DECEMBER 2020

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

OVERALL PERFORMANCE

KEY INDICATORS	DEC 2020 Actual	DEC 2020 % Change	FULL YEAR 2020 Actual	FULL YEAR 2020 % Change
GUESTS	15,321	14.1% ▲	150,631	-8.9% ▼
OCCUPANCY RATE	36%	-39.5% ▼	38%	-39.3% ▼
ALOS NIGHTS	2.1	-51.3% ▼	2.6	-39.1% ▼
REVENUES (M AED)	42.4	-49.3% ▼	424.0	-40.4% ▼
ARR (AED)	1,291	-1.7% ▼	1,023	-0.9% ▼
REVPAR (AED)	461	-40.5% ▼	389	-39.8% ▼

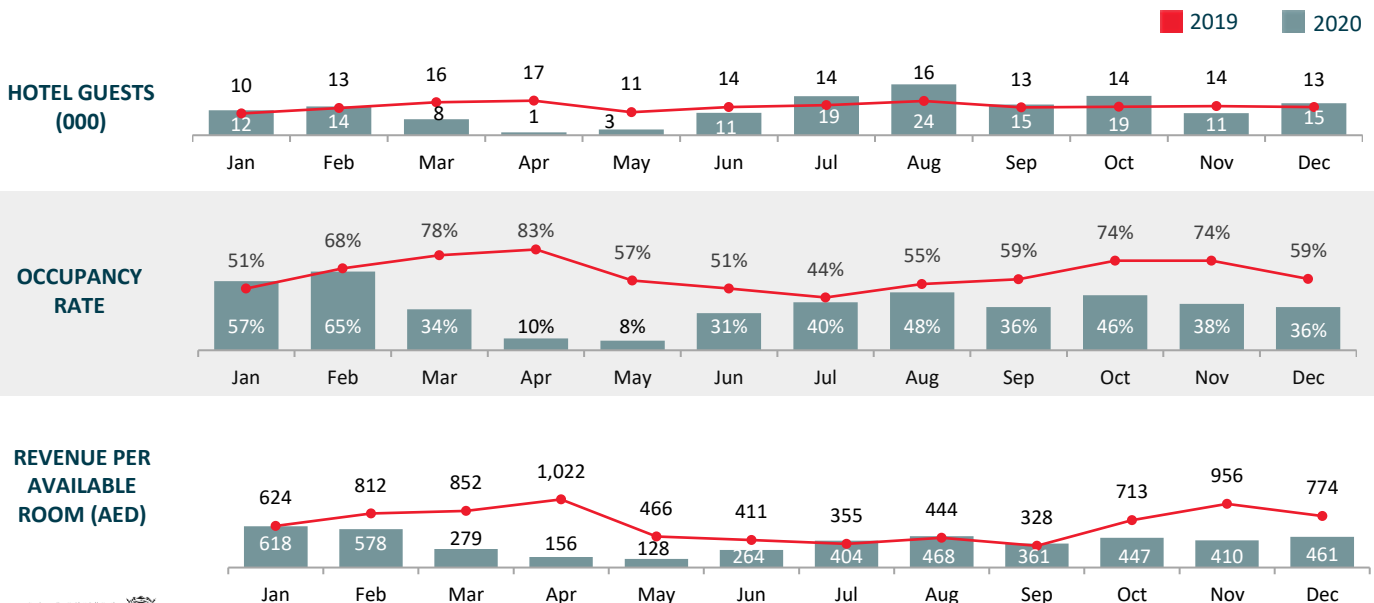
TOP NATIONALITIES (000s) – DEC 2020

		% Change	% Share
UAE	9.7	251.0%	63.5%
UK	0.7	-59.3%	4.4%
India	0.5	-16.4%	3.3%
USA	0.5	42.6%	3.1%
France	0.4	-54.6%	2.4%
Egypt	0.3	125.0%	1.9%
Jordan	0.3	134.9%	1.7%
Canada	0.2	161.8%	1.5%
Italy	0.2	-62.7%	1.4%
Philippines	0.2	233.3%	1.2%
Lebanon	0.2	41.8%	1.2%

TOP NATIONALITIES (000s) – FULL YEAR 2020

		% Change	% Share
UAE	84.9	88.4%	56.3%
UK	9.7	-50.8%	6.4%
Germany	4.1	-78.2%	2.7%
Russia	3.9	-65.2%	2.6%
USA	3.7	-10.5%	2.5%
France	3.5	-38.0%	2.3%
Egypt	3.1	79.1%	2.0%
Jordan	3.0	94.2%	2.0%
Lebanon	2.9	41.7%	1.9%
India	2.7	-30.3%	1.8%
Philippines	2.0	45.8%	1.3%

MONTHLY TRENDS



ADNEC PERFORMANCE

DECEMBER 2020

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

OVERALL PERFORMANCE

KEY INDICATORS	DEC 2020 Actual	DEC 2020 % Change	FULL YEAR 2020 Actual	FULL YEAR 2020 % Change
GUESTS	19,220	-36.0%	191,379	-37.3%
OCCUPANCY RATE	85%	-1.0%	78%	-5.4%
ALOS NIGHTS	4.1	48.9%	4.2	35.7%
REVENUES (M AED)	11.9	-34.7%	143.3	-31.6%
ARR (AED)	183	-34.0%	195	-29.4%
REVPAR (AED)	156	-34.6%	153	-33.2%

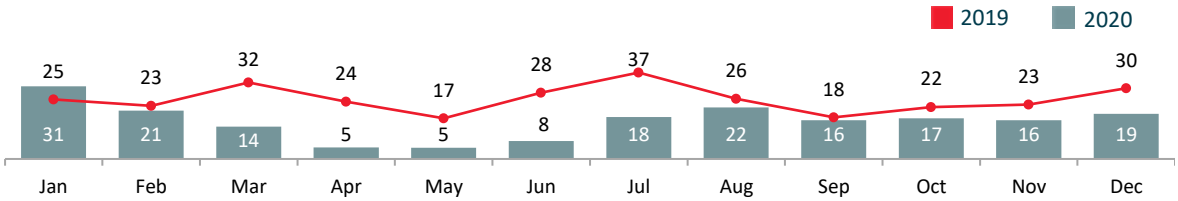
TOP NATIONALITIES (000s) – DEC 2020

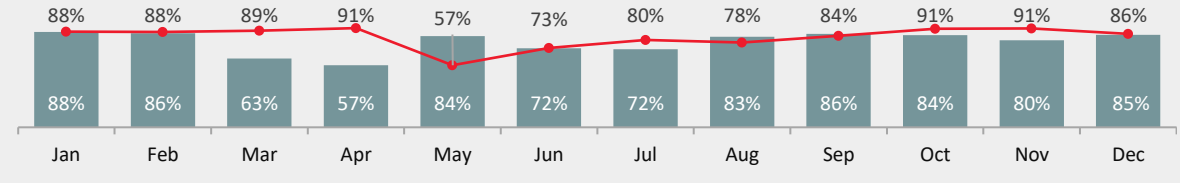
		% Change	% Share
UAE	9.4	-31.7%	48.8%
Philippines	1.1	28.3%	5.6%
Egypt	1.0	19.7%	5.3%
India	0.9	-41.4%	4.8%
Jordan	0.8	37.5%	4.3%
Ecuador	0.6	3,659%	3.3%
Pakistan	0.6	-16.2%	3.0%
Syria	0.4	37.5%	2.2%
USA	0.3	-56.8%	1.8%
UK	0.3	-54.3%	1.6%
Lebanon	0.3	48.0%	1.3%

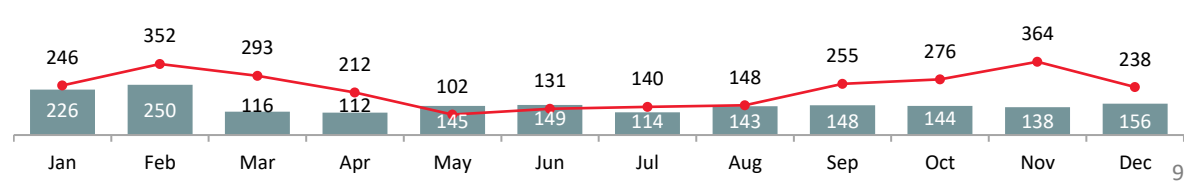
TOP NATIONALITIES (000s) – FULL YEAR 2020

		% Change	% Share
UAE	87.9	-18.9%	45.9%
India	13.9	-26.8%	7.3%
Egypt	9.7	-20.6%	5.1%
Philippines	7.3	-38.4%	3.8%
Jordan	6.8	-20.0%	3.5%
Pakistan	5.9	-26.0%	3.1%
USA	4.2	-53.0%	2.2%
UK	4.2	-58.7%	2.2%
Saudi Arabia	4.1	-61.2%	2.1%
Syria	3.4	-23.5%	1.8%
China	3.3	-85.2%	1.7%

MONTHLY TRENDS







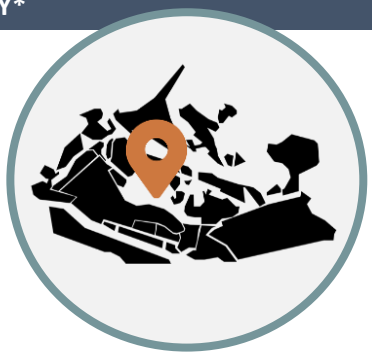
ABU DHABI ISLAND PERFORMANCE

DECEMBER 2020

HOTEL SUPPLY*

115 HOTELS

23,013 ROOMS



STAR RATING	5 STAR	4 STAR	1-3 STAR	APTS
	36 HOTELS	23 HOTELS	20 HOTELS	36 HOTELS
	11,335 ROOMS	4,795 ROOMS	2,353 ROOMS	4,530 ROOMS

OVERALL PERFORMANCE

KEY INDICATORS	DEC 2020 Actual	DEC 2020 % Change	FULL YEAR 2020 Actual	FULL YEAR 2020 % Change
GUESTS	210,535	-37.2%	2,224,138	-38.4%
OCCUPANCY RATE	69%	-12.5%	69%	-7.9%
ALOS NIGHTS	3.2	18.2%	3.5	31.3%
REVENUES (M AED)	221.6	-44.4%	2,409.2	-39.6%
ARR (AED)	265	-30.2%	253	-24.6%
REVPAR (AED)	184	-38.9%	174	-30.6%

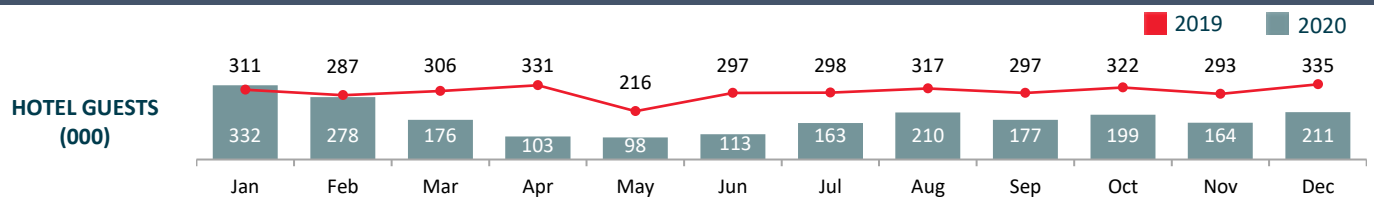
TOP NATIONALITIES (000s) – DEC 2020

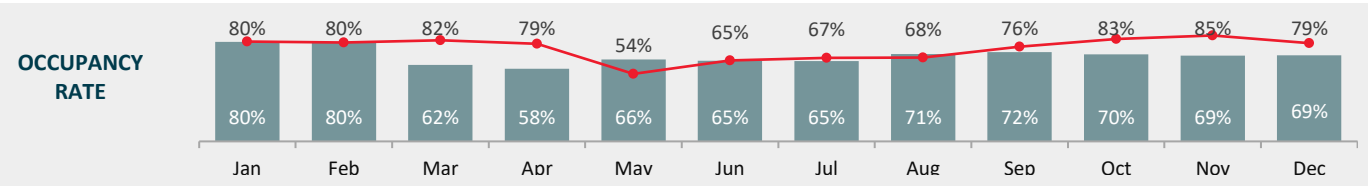
		% Change	% Share
UAE	90.9	6.0%	43.2%
India	24.7	-23.6%	11.7%
Philippines	16.9	45.3%	8.0%
Egypt	10.9	-4.7%	5.2%
Pakistan	7.6	7.1%	3.6%
Jordan	6.9	-3.2%	3.3%
UK	4.1	-73.9%	1.9%
USA	4.0	-70.2%	1.9%
Syria	3.8	-3.2%	1.8%
Morocco	2.4	-36.9%	1.2%
S.Korea	2.3	-27.8%	1.1%

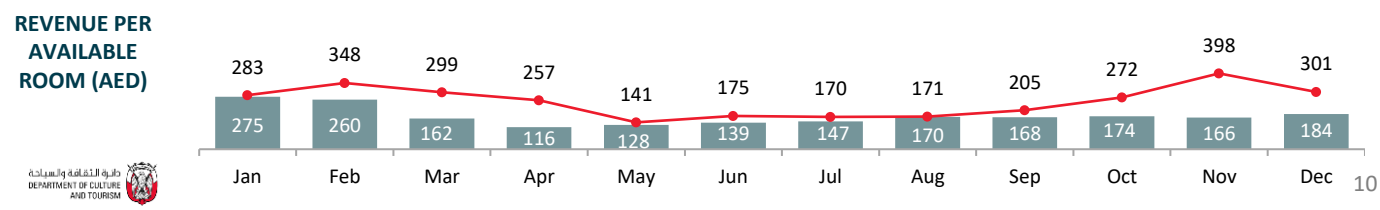
TOP NATIONALITIES (000s) – FULL YEAR 2020

		% Change	% Share
UAE	739.2	-22.4%	33.2%
India	269.4	-18.1%	12.1%
Philippines	130.9	-1.8%	5.9%
Egypt	123.8	-12.3%	5.6%
Pakistan	76.2	-13.6%	3.4%
Jordan	70.3	-18.1%	3.2%
UK	70.3	-62.6%	3.2%
USA	69.5	-57.2%	3.1%
China	48.9	-85.1%	2.2%
Syria	41.0	-9.6%	1.8%
Saudi Arabia	31.0	-68.6%	1.4%

MONTHLY TRENDS





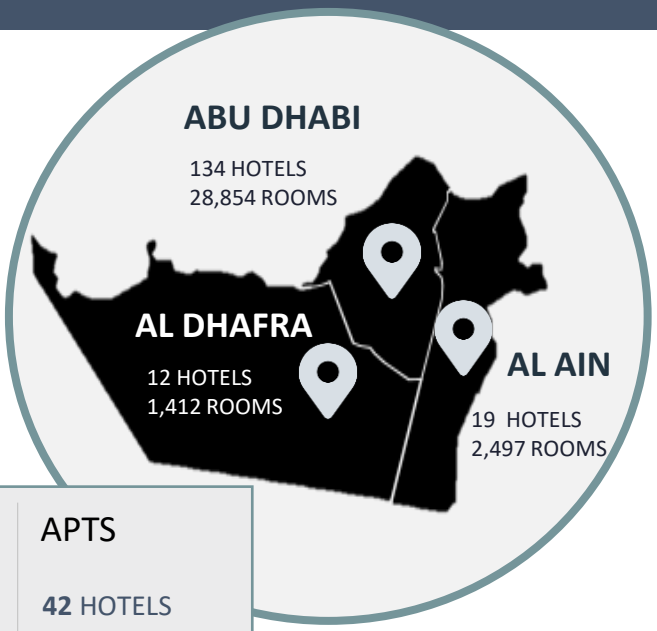


HOTEL SUPPLY
DECEMBER 2020

HOTEL SUPPLY AS OF 31st DECEMBER 2020

165 HOTELS

32,763 ROOMS



STAR RATING	5 STAR	4 STAR	1-3 STAR	APTS
	54 HOTELS **15,203** ROOMS	**38** HOTELS **7,975** ROOMS	**31** HOTELS **4,264** ROOMS	**42** HOTELS **5,321** ROOMS

Quarantine Hotels: The number of properties used for quarantine purposes have remained unchanged from Nov. As of Dec 31, 6 hotels continue to be used for quarantine reasons. Throughout the year, 50 properties were used at some point for quarantine purposes (Feb – Dec 2020)

Temporary Closed Hotels: 5 hotels were temporarily closed at some point in December. 2 hotels remained temporarily closed for the entire month (225 rooms), while the remaining 3 hotels were closed at some point in Dec (627 rooms). Liwa hotel resumed its hotel operations in the past month (Dec 1), after remaining closed since July 2019.

Yas Island Hotels: Hotels in Yas Island were under lockdown until the mid of December to accommodate the F1 2020 event. Between Dec 16 – Dec 31, 5 Yas Island hotels were opened for commercial business

RECENT SUPPLY ADDITIONS AND CLOSURES - 2020

Closures

CLOSED: JAN 2020

BIN MAJID HOTEL APT

LOCATION: ABU DHABI ISLAND

TYPE: DELUXE APT

ROOMS: 224

CLOSED: JUL 2020

PARAGON HOTEL

LOCATION: ABU DHABI ISLAND

TYPE: 3 STAR

ROOMS: 209

CLOSED: SEP 2020

MURJAN ASFAR HOTEL APT

LOCATION: ABU DHABI ISLAND

TYPE: SUPERIOR APT

ROOMS: 92

CLOSED: OCT 2020

RAMEE GARDEN HOTEL APT

LOCATION: ABU DHABI ISLAND

TYPE: STANDARD APT

ROOMS: 36

Additions

OPEN: MAR/OCT 2020*

REMAL HOTEL

LOCATION: AL DHAFRA

TYPE: 4 STAR

ROOMS: 205

*Remal Hotel, located in Al Dhafra region, was issued a temporary license in March and has been recently upgraded to a 4-star property (Oct). As a result, this hotel has been now added into the supply

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GLOSSARY

DECEMBER 2020

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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