ABU DHABI

HOTEL PERFORMANCE REPORT

MAY 2020

دائرة الثقافة والسياحة
DEPARTMENT OF CULTURE AND TOURISM

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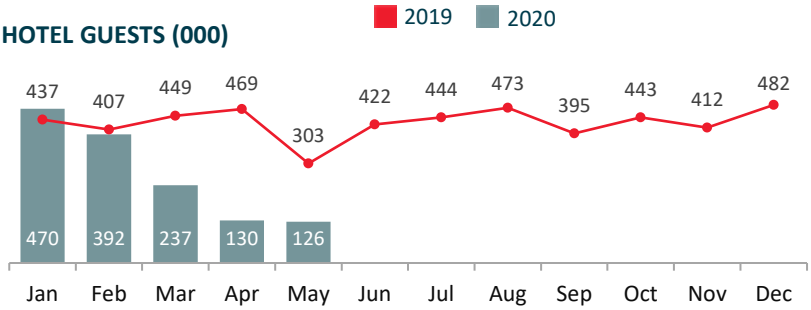
OVERALL PERFORMANCE

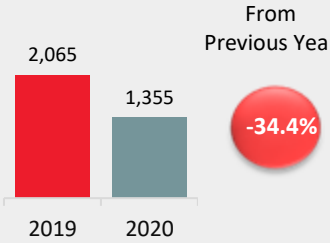
MAY 2020

HOTEL GUESTS (000)

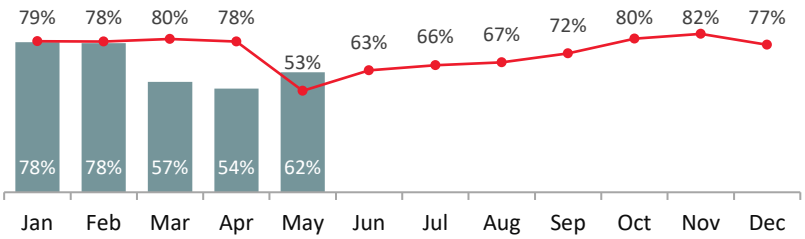


% Change (May 2020): -58.6%

YTD (JAN- MAY)



OCCUPANCY RATE



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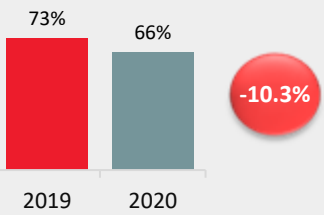
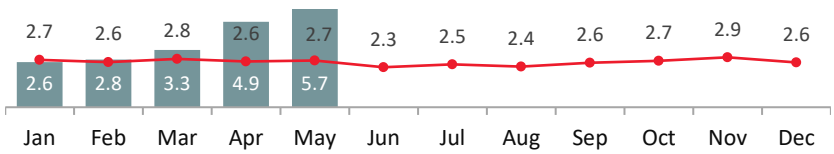


AVERAGE LENGTH OF STAY (ALOS-NIGHTS)



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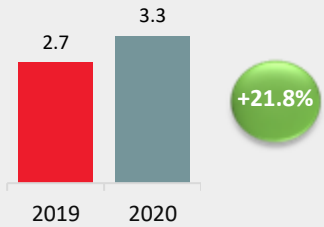
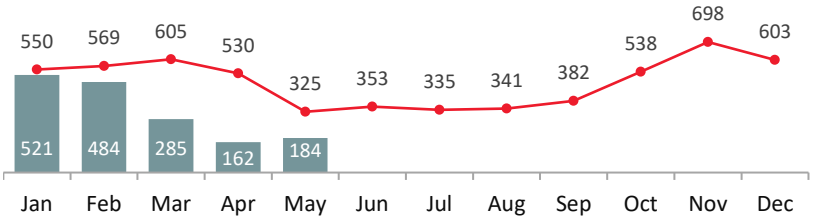


HOTEL TOTAL REVENUE (MILLION AED)



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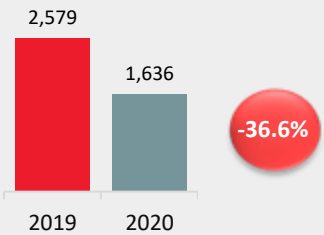
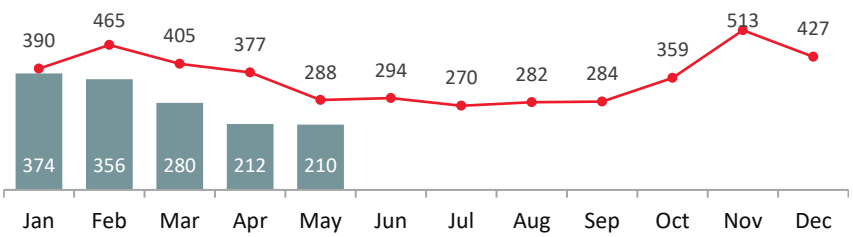


AVERAGE ROOM RATE (AED)



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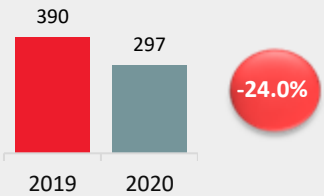
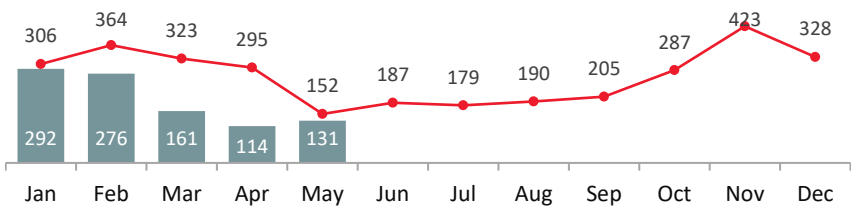


REVENUE PER AVAILABLE ROOM (AED)



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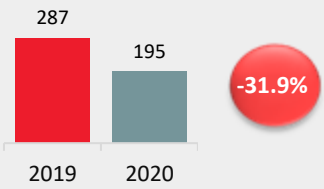

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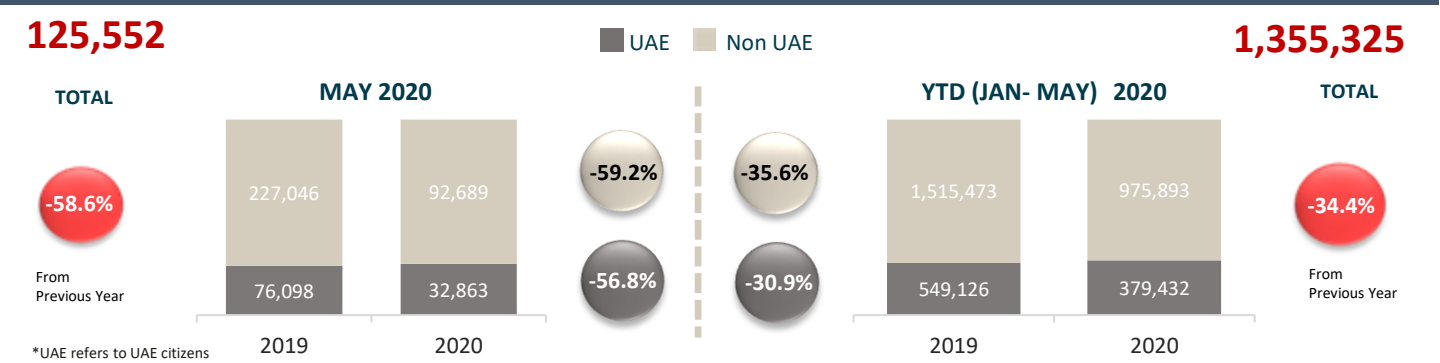
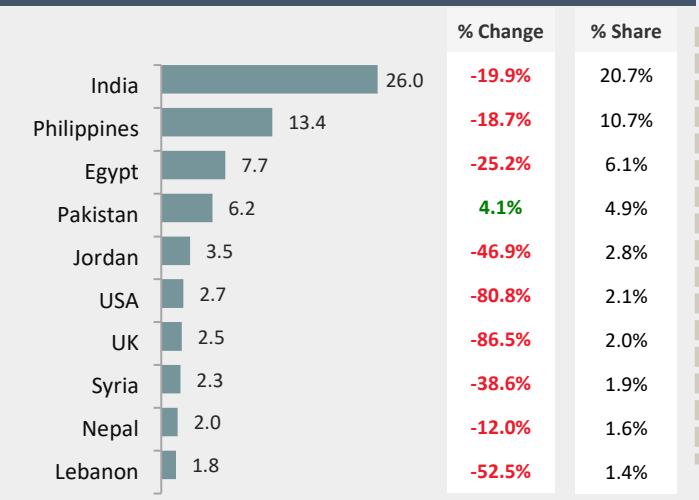
HOTEL GUESTS BY NATIONALITY

MAY 2020

UAE VS. NON-UAE HOTEL GUESTS



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

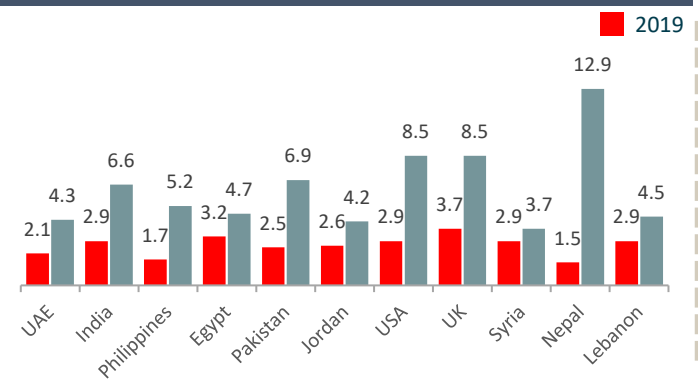


	% Change	% Share
India	-19.9%	20.7%
Philippines	-18.7%	10.7%
Egypt	-25.2%	6.1%
Pakistan	4.1%	4.9%
Jordan	-46.9%	2.8%
USA	-80.8%	2.1%
UK	-86.5%	2.0%
Syria	-38.6%	1.9%
Nepal	-12.0%	1.6%
Lebanon	-52.5%	1.4%

TOP 10 NON-UAE NATIONALITIES (000s) YTD MAY 2020

	% Change	% Share
India	-7.6%	11.0%
Egypt	-15.6%	4.5%
UK	-48.9%	4.4%
Philippines	-17.2%	3.9%
China	-71.0%	3.9%
USA	-40.9%	3.9%
KSA	-16.6%	3.3%
Pakistan	-16.1%	2.7%
Jordan	-30.1%	2.4%
Germany	-54.5%	2.1%

ALOS (NIGHTS) – MAY 2020



ALOS (NIGHTS) – YTD MAY 2020

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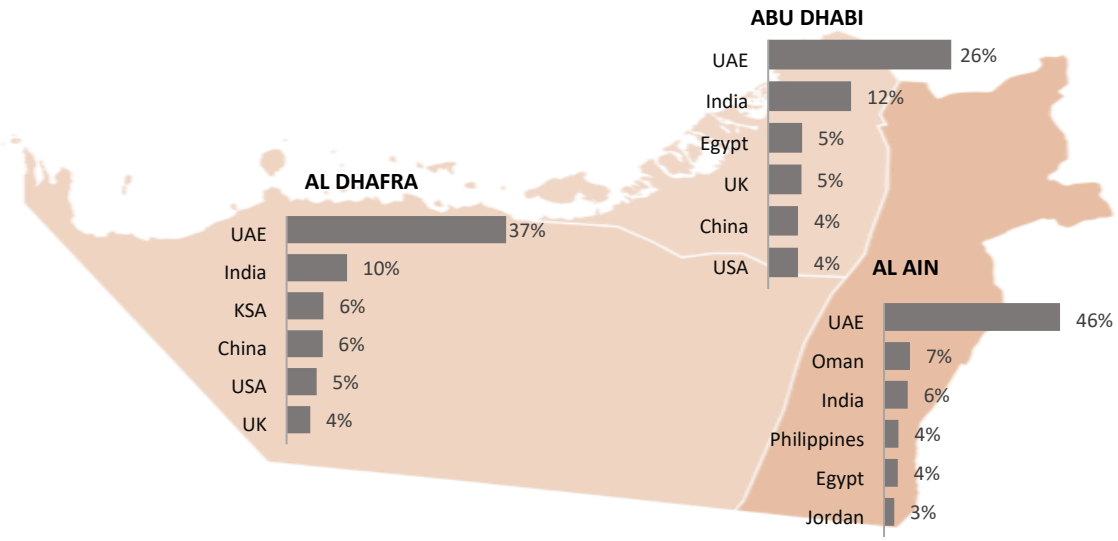
PERFORMANCE BY REGION

MAY 2020

REGIONAL PERFORMANCE – MAY 2020

KEY INDICATORS	ABU DHABI		AL AIN		AL DHAFRA	
	Actual	% Change	Actual	% Change	Actual	% Change
GUESTS	106,612	-60.6%	13,627	-41.6%	5,313	-41.3%
OCCUPANCY RATE	62%	13.8%	60%	61.3%	70%	102.9%
ALOS DAYS	6.1	117.3%	3.4	67.5%	4.4	110.5%
REVENUES (M AED)	153.4	-48.6%	10.3	-33.2%	20.1	85.2%
ARR (AED)	203	-29.3%	163	-29.9%	476	3.7%
REVPAR (AED)	127	-19.5%	99	13.0%	332	110.4%

TOP NATIONALITIES ACROSS REGIONS – YTD MAY 2020



REGIONAL PERFORMANCE – YTD MAY 2020

KEY INDICATORS	ABU DHABI		AL AIN		AL DHAFRA	
	Actual	% Change	Actual	% Change	Actual	% Change
GUESTS	1,176,755	-34.7%	132,347	-33.9%	46,223	-24.4%
OCCUPANCY RATE	67%	-11.7%	57%	-8.7%	65%	38.9%
ALOS DAYS	3.4	22.7%	2.2	9.2%	2.9	30.6%
REVENUES (M AED)	1,444.2	-38.2%	78.3	-37.0%	113.2	-4.2%
ARR (AED)	291	-25.0%	221	-22.5%	597	-22.6%
REVPAR (AED)	194	-33.8%	125	-29.2%	390	7.5%

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DEPARTMENT OF CULTURE AND TOURISM

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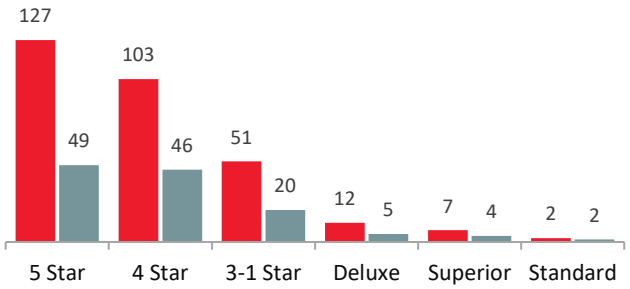
PERFORMANCE BY STAR RATINGS

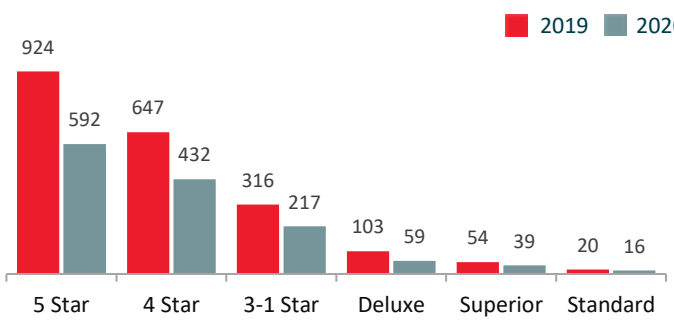
MAY 2020

PERFORMANCE ACROSS KEY INDICATORS

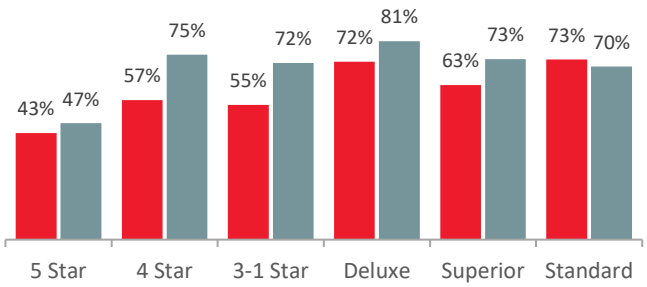
HOTEL GUESTS – MAY 2020



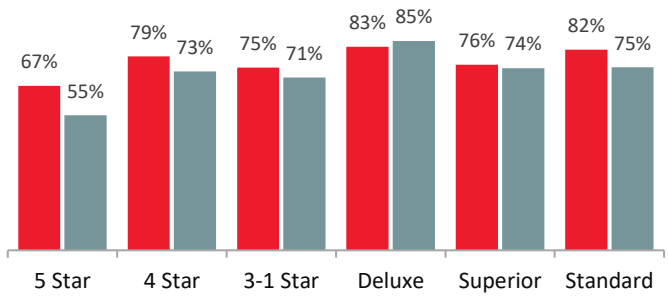
HOTEL GUESTS – YTD MAY 2020



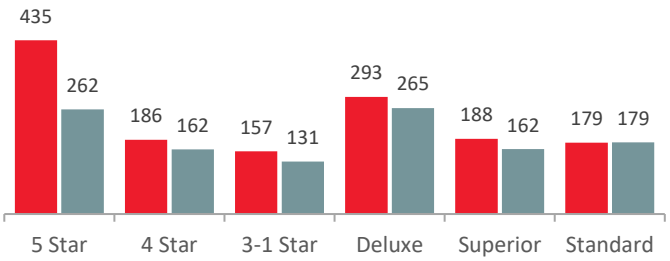
HOTEL OCCUPANCY– MAY 2020



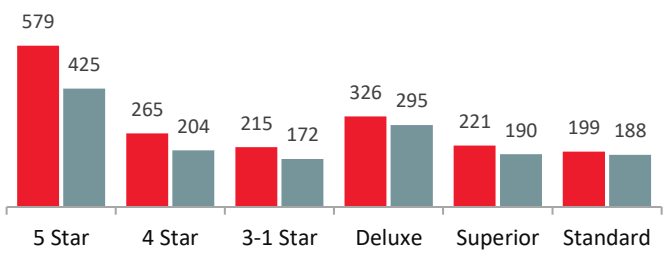
HOTEL OCCUPANCY – YTD MAY 2020



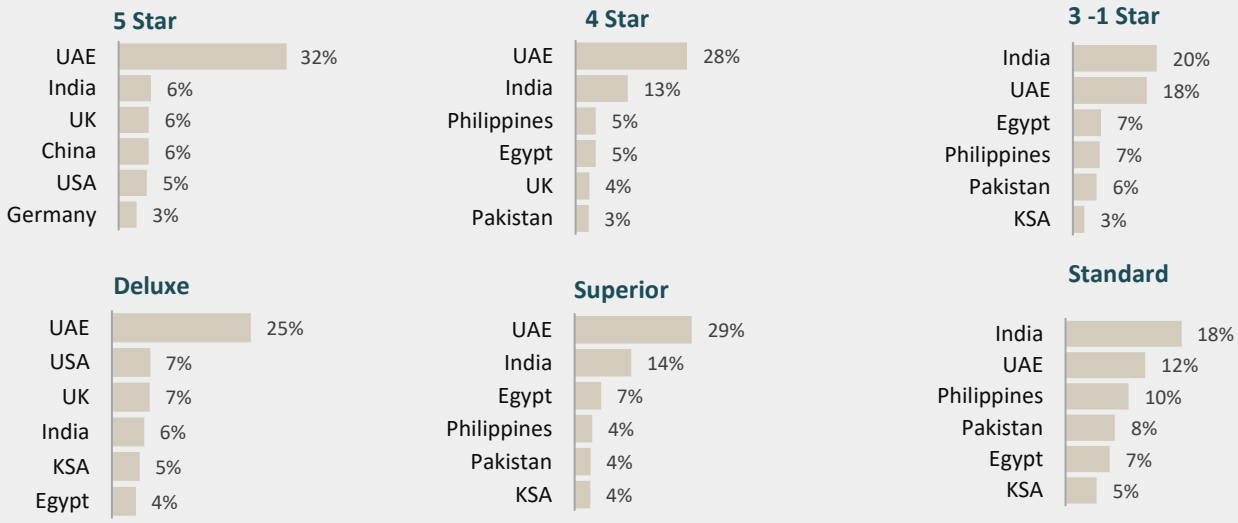
HOTEL ARR (AED)– MAY 2020



HOTEL ARR (AED) –YTD MAY 2020



TOP NATIONALITIES – YTD MAY 2020



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YAS ISLAND PERFORMANCE

MAY 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	MAY 2020 Actual	MAY 2020 % Change	YTD MAY 2020 Actual	YTD MAY 2020 % Change
GUESTS	1,801	-93.2% ▼	77,966	-52.1% ▼
OCCUPANCY RATE	33%	-37.4% ▼	53%	-34.9% ▼
ALOS NIGHTS	8.8	271.6% ▲	3.1	15.0% ▲
REVENUES (M AED)	4.8	-73.2% ▼	81.0	-52.3% ▼
ARR (AED)	221	-15.7% ▼	278	-22.3% ▼
REVPAR (AED)	73	-47.3% ▼	148	-49.4% ▼

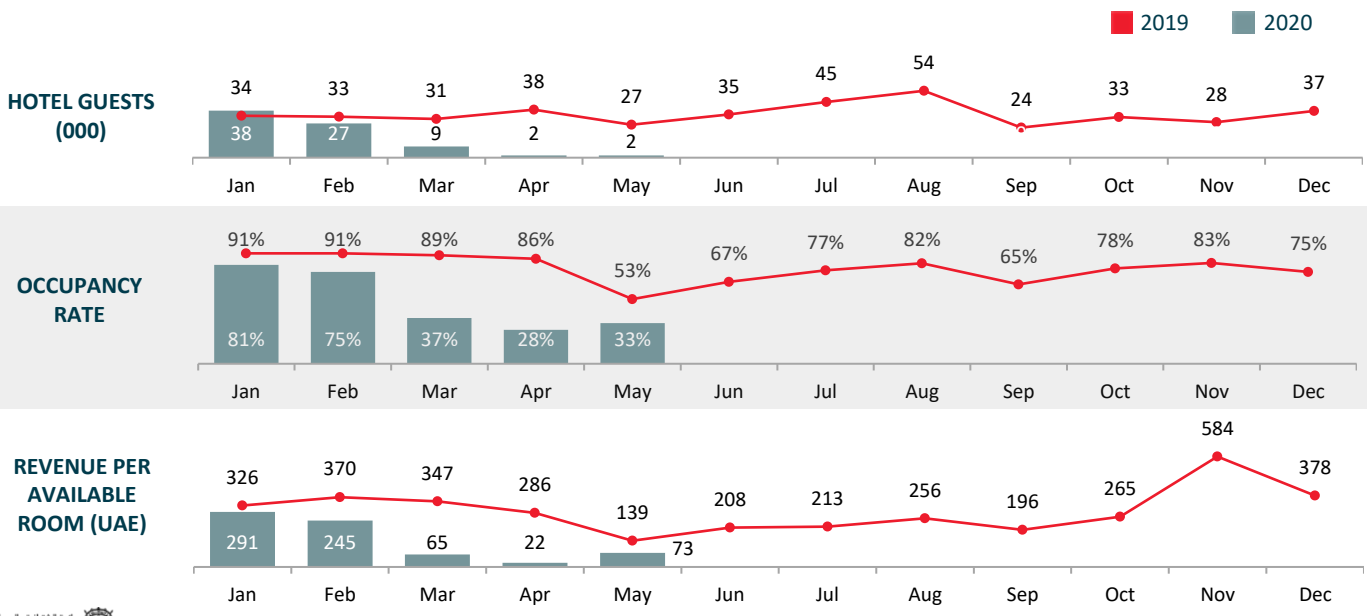
TOP NATIONALITIES (000s) – MAY 2020

		% Change	% Share
UAE	0.51	-88.5%	28.3%
Cuba	0.33	---	18.2%
India	0.29	-95.0%	16.2%
Philippines	0.08	-97.3%	4.6%
Pakistan	0.08	-73.4%	4.4%
UK	0.07	-97.0%	3.9%
Nepal	0.06	-11.3%	3.1%
USA	0.05	-94.8%	2.9%
Bangladesh	0.04	500.0%	2.3%
Egypt	0.03	-95.0%	1.4%
South Africa	0.03	-94.5%	1.4%

TOP NATIONALITIES (000s) – YTD MAY 2020

		% Change	% Share
UAE	18.1	-51.5%	23.2%
India	10.9	-41.8%	14.0%
UK	6.2	-59.7%	7.9%
KSA	5.8	-5.8%	7.4%
China	4.0	-67.6%	5.2%
USA	3.0	-53.2%	3.9%
Egypt	1.9	-41.1%	2.5%
France	1.6	-36.9%	2.1%
Philippines	1.5	-75.4%	1.9%
Kuwait	1.3	-50.6%	1.7%
South Africa	1.2	-50.6%	1.6%

MONTHLY TRENDS



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SAADIYAT & NICHE AREAS PERFORMANCE

MAY 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	MAY 2020 Actual	MAY 2020 % Change	YTD MAY 2020 Actual	YTD MAY 2020 % Change
GUESTS	2,729	-75.4% ▼	37,432	-44.0% ▼
OCCUPANCY RATE	8%	-86.2% ▼	36%	-46.1% ▼
ALOS NIGHTS	2.9	-42.0% ▼	4.3	-8.3% ▼
REVENUES (M AED)	10.7	-76.2% ▼	177.6	-45.4% ▼
ARR (AED)*	1,624	100.2% ▲	1,005	-10.0% ▼
REVPAR (AED)	128	-72.5% ▼	366	-51.5% ▼

*Increase in ARR can be attributed to high demand for villas in some of the Saadiyat hotels

TOP NATIONALITIES (000s) – MAY 2020

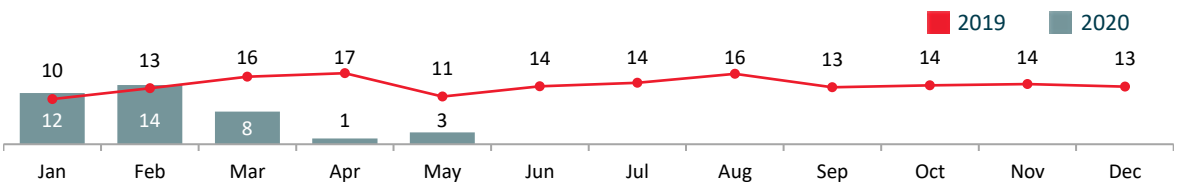
		% Change	% Share
UAE	2.10	13.5%	76.9%
Jordan	0.12	162.2%	4.3%
UK	0.11	-94.2%	3.8%
USA	0.04	-86.8%	1.4%
Italy	0.03	-92.4%	1.1%
Lebanon	0.03	-85.6%	1.0%
France	0.03	-92.6%	1.0%
Egypt	0.02	-62.7%	0.8%
Germany	0.02	-98.7%	0.7%
India	0.02	-87.2%	0.7%
Ukraine	0.02	-91.8%	0.6%

TOP NATIONALITIES (000s) – YTD MAY 2020

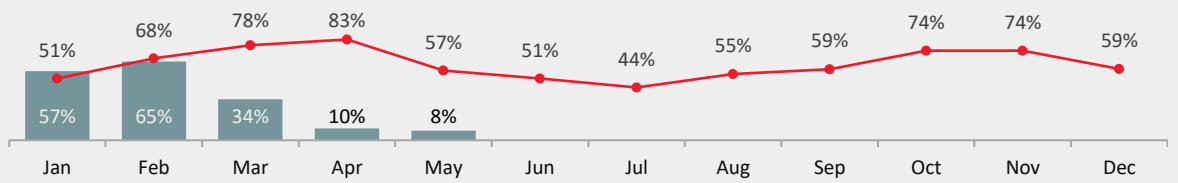
		% Change	% Share
UAE	10.1	-18.7%	27.0%
UK	4.2	-51.8%	11.2%
Russia	3.5	-36.8%	9.3%
Germany	3.4	-61.4%	9.1%
France	1.7	-35.9%	4.5%
KSA	1.1	-20.7%	3.0%
USA	1.1	-50.1%	2.9%
Italy	1.0	-62.2%	2.7%
Switzerland	1.0	-55.0%	2.6%
Kazakhstan	0.9	-65.7%	2.4%
India	0.7	-58.6%	2.0%

MONTHLY TRENDS

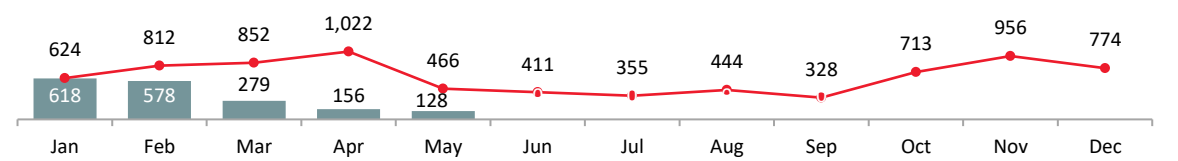
HOTEL GUESTS (000)



OCCUPANCY RATE



REVENUE PER AVAILABLE ROOM (UAE)



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ADNEC PERFORMANCE

MAY 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	MAY 2020 Actual	MAY 2020 % Change	YTD MAY 2020 Actual	YTD MAY 2020 % Change
GUESTS	4,725	-72.7% ▼	74,706	-38.7% ▼
OCCUPANCY RATE	84%	46.8% ▲	76%	-8.2% ▼
ALOS NIGHTS	12.3	328.4% ▲	4.2	40.2% ▲
REVENUES (M AED)	13.8	58.0% ▲	66.4	-26.9% ▼
ARR (AED)	173	-2.8% ▼	223	-23.0% ▼
REVPAR (AED)	145	42.6% ▲	169	-29.3% ▼

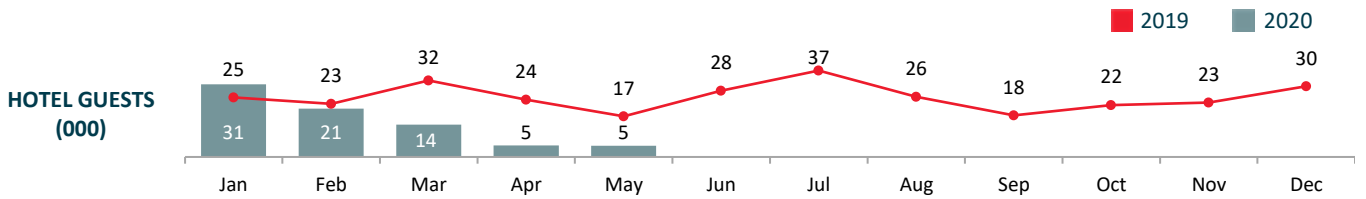
TOP NATIONALITIES (000s) – MAY 2020

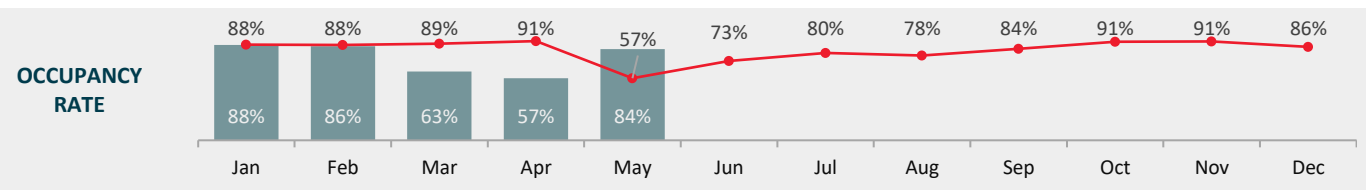
		% Change	% Share
UAE	1.10	-79.4%	23.2%
India	0.82	-36.5%	17.4%
Philippines	0.56	-34.8%	11.8%
Pakistan	0.35	-34.4%	7.5%
Egypt	0.28	-65.3%	5.9%
Nepal	0.16	65.3%	3.4%
Jordan	0.12	-78.2%	2.5%
Syria	0.10	-67.7%	2.1%
USA	0.09	-74.7%	1.9%
Bangladesh	0.09	244.0%	1.8%
Morocco	0.08	-40.6%	1.7%

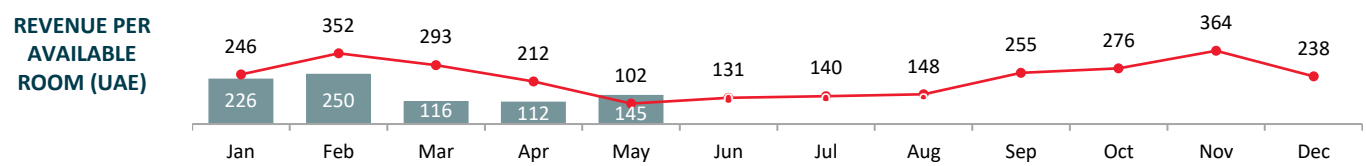
TOP NATIONALITIES (000s) – YTD MAY 2020

		% Change	% Share
UAE	28.2	-29.8%	37.7%
India	5.6	-22.7%	7.5%
KSA	3.6	-4.7%	4.9%
Egypt	3.6	-29.4%	4.8%
China	3.1	-66.9%	4.1%
Philippines	2.3	-49.0%	3.1%
USA	2.3	-41.2%	3.1%
Pakistan	2.1	-29.7%	2.8%
UK	2.1	-51.9%	2.7%
Jordan	2.0	-43.3%	2.6%
Syria	1.0	-40.3%	1.3%

MONTHLY TRENDS







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ABU DHABI ISLAND PERFORMANCE*

MAY 2020

*Abu Dhabi Island includes Corniche, Marina, Bateen, Al Markaziyah, Al Zahiya, Al Maryah Island, Al Reem Island, Al Maqtaa Creek, Al Gurm Corniche, Zayed Sports City, Khalifa City & Raha Beach & Outskirts

HOTEL SUPPLY

118 HOTELS

23,296 ROOMS

STAR RATING	5 STAR	4 STAR	1-3 STAR	APTS
	36 HOTELS	22 HOTELS	22 HOTELS	38 HOTELS
	11,287 ROOMS	4,663 ROOMS	2,689 ROOMS	4,657 ROOMS

OVERALL PERFORMANCE

KEY INDICATORS	MAY 2020 Actual	MAY 2020 % Change	YTD MAY 2020 Actual	YTD MAY 2020 % Change
GUESTS	97,357	-54.9%	986,651	-32.0%
OCCUPANCY RATE	66%	21.4%	69%	-7.5%
ALOS NIGHTS	5.8	113.1%	3.4	24.5%
REVENUES (M AED)	124.1	-45.3%	1,119.1	-36.1%
ARR (AED)	193	-25.8%	272	-23.0%
REVPAR (AED)	128	-9.9%	188	-28.8%

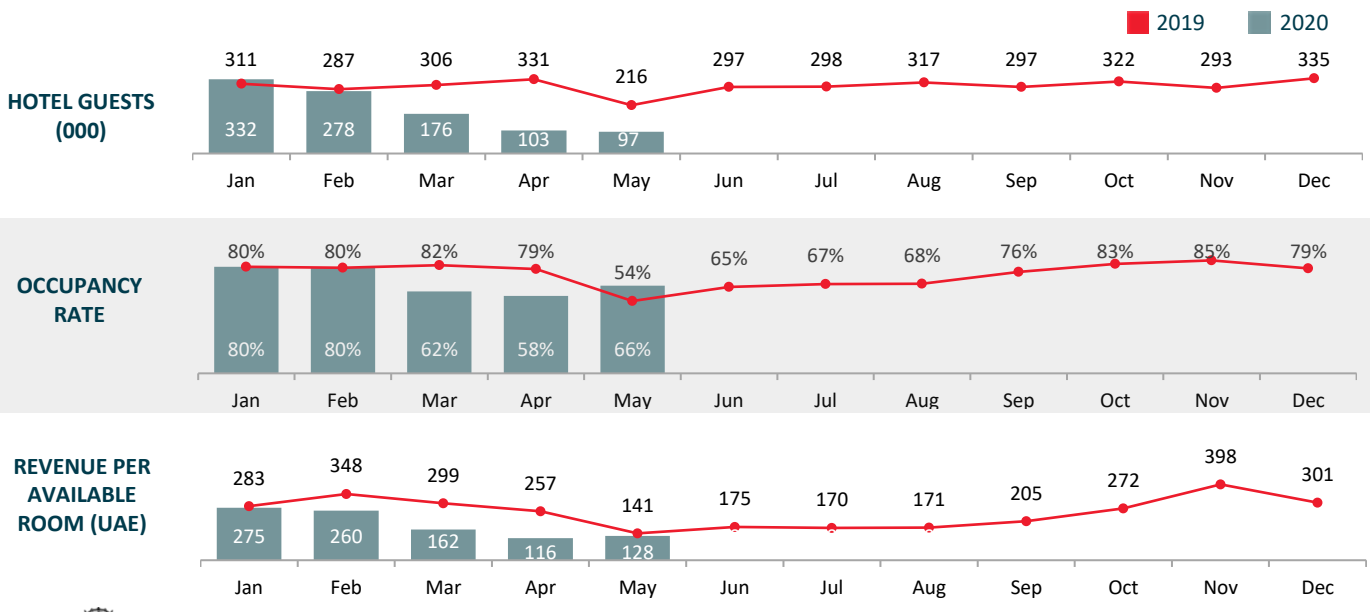
TOP NATIONALITIES (000s) – MAY 2020

		% Change	% Share
UAE	22.5	-56.0%	23.1%
India	22.1	-3.3%	22.7%
Philippines	10.9	-3.0%	11.1%
Egypt	6.7	-16.9%	6.9%
Pakistan	5.0	10.4%	5.1%
Jordan	2.7	-45.7%	2.8%
USA	2.1	-81.1%	2.2%
UK	1.7	-86.2%	1.8%
Syria	1.6	-34.3%	1.7%
Nepal	1.6	-16.6%	1.7%
Lebanon	1.5	-41.3%	1.5%

TOP NATIONALITIES (000s) – YTD MAY 2020

		% Change	% Share
UAE	245.2	-29.9%	24.9%
India	119.4	-0.3%	12.1%
Egypt	49.8	-12.1%	5.0%
Philippines	43.4	-8.3%	4.4%
USA	42.6	-39.3%	4.3%
UK	42.2	-47.3%	4.3%
China	41.9	-72.1%	4.3%
Pakistan	29.1	-11.8%	2.9%
KSA	28.6	-17.6%	2.9%
Jordan	25.3	-27.2%	2.6%
Germany	21.1	-50.2%	2.1%

MONTHLY TRENDS



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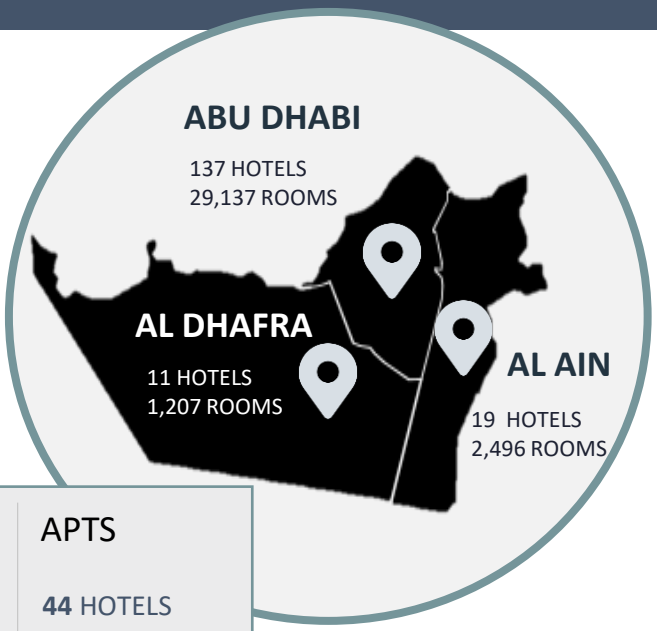
HOTEL SUPPLY
MAY 2020

HOTEL SUPPLY AS OF APRIL 2020

167 HOTELS

32,840 ROOMS



STAR RATING	5 STAR	4 STAR	1-3 STAR	APTS
	54 HOTELS **15,154** ROOMS	**36** HOTELS **7,638** ROOMS	**33** HOTELS **4,600** ROOMS	**44** HOTELS **5,448** ROOMS

Quarantine Hotels: Around 15 properties across the Abu Dhabi emirate were used at some point for quarantine purposes in May.

Temporary Closed Hotels: May supply includes 16 temporary closed hotels. 13 of these hotels were closed for the entire month, while the remaining 3 hotels were closed for some days in the month.

RECENT SUPPLY ADDITIONS AND CLOSURES - 2020

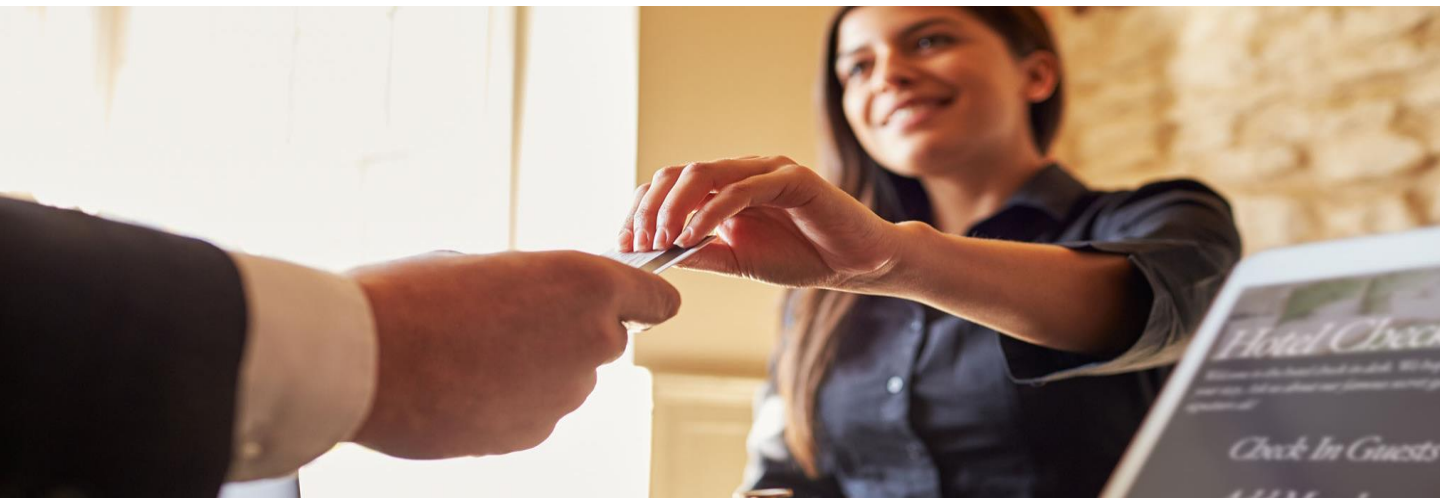
CLOSED: JAN 2020

BIN MAJID TOWER HOTEL APT

LOCATION: AL MARKAZIYAH & AL ZAHIYA

TYPE: DELUXE APT

ROOMS: 224



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GLOSSARY

MAY 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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