

ABU DHABI

HOTEL PERFORMANCE REPORT

JANUARY 2021



دائرة الثقافة والسياحة
DEPARTMENT OF CULTURE
AND TOURISM



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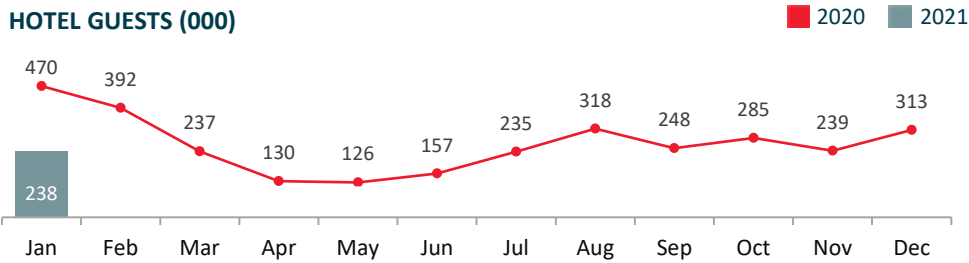
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OVERALL PERFORMANCE

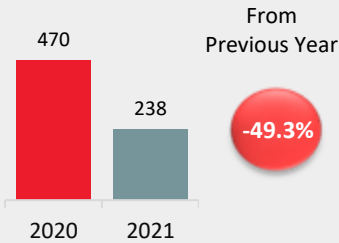
JANUARY 2021



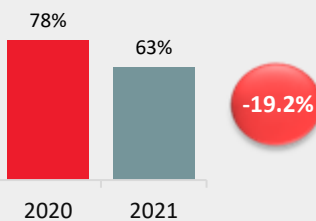
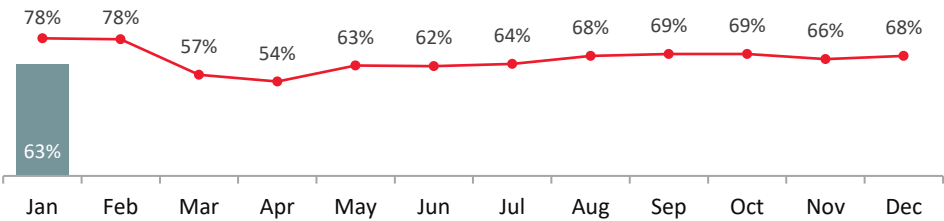
HOTEL GUESTS (000)



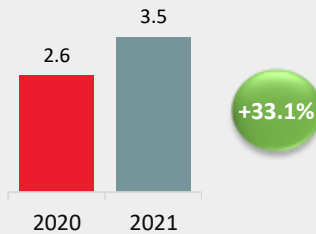
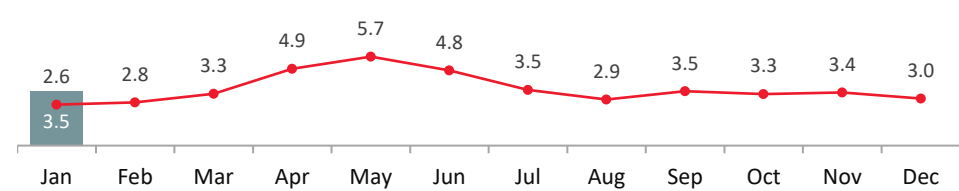
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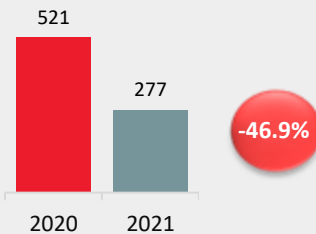
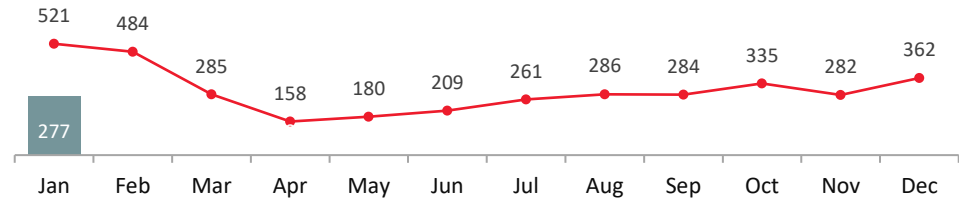
OCCUPANCY RATE



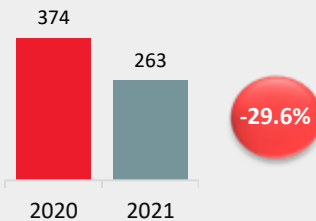
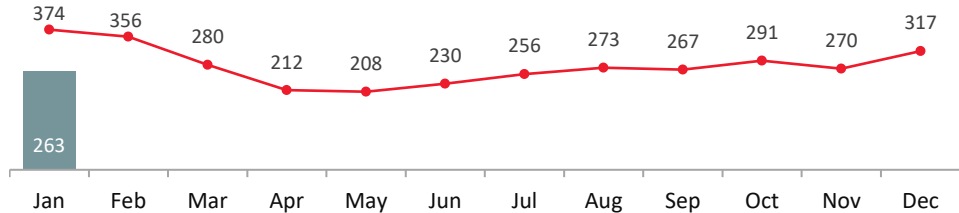
AVERAGE LENGTH OF STAY (ALOS-NIGHTS)



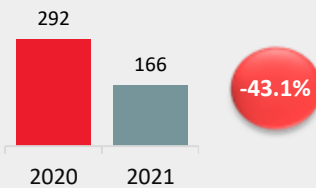
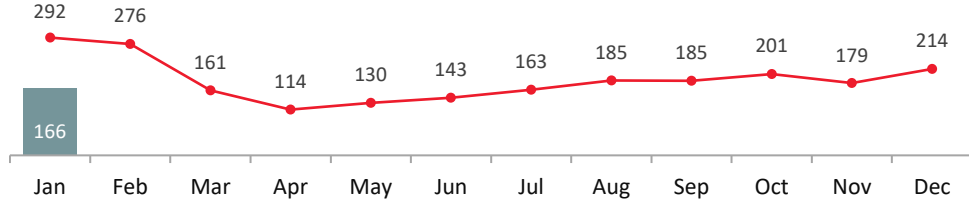
HOTEL TOTAL REVENUE (MILLION AED)



AVERAGE ROOM RATE (AED)



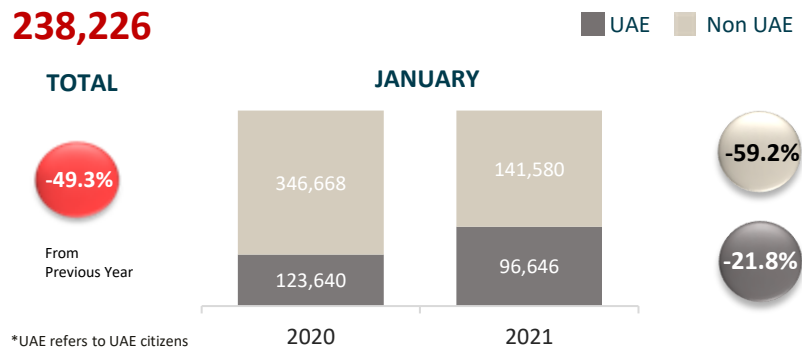
REVENUE PER AVAILABLE ROOM (AED)



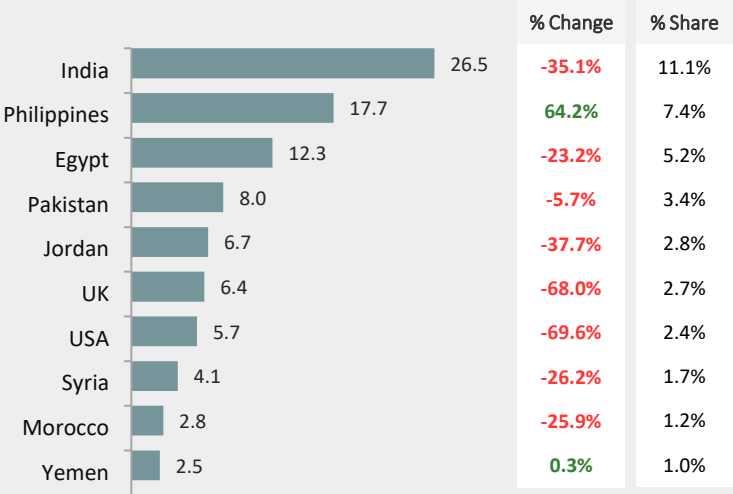
HOTEL GUESTS BY NATIONALITY

JANUARY 2021

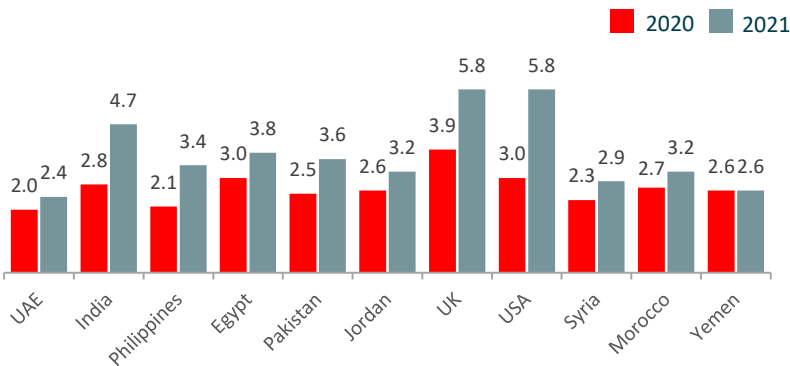
UAE VS. NON-UAE HOTEL GUESTS



TOP 10 NON-UAE NATIONALITIES (000s)



ALOS (NIGHTS)



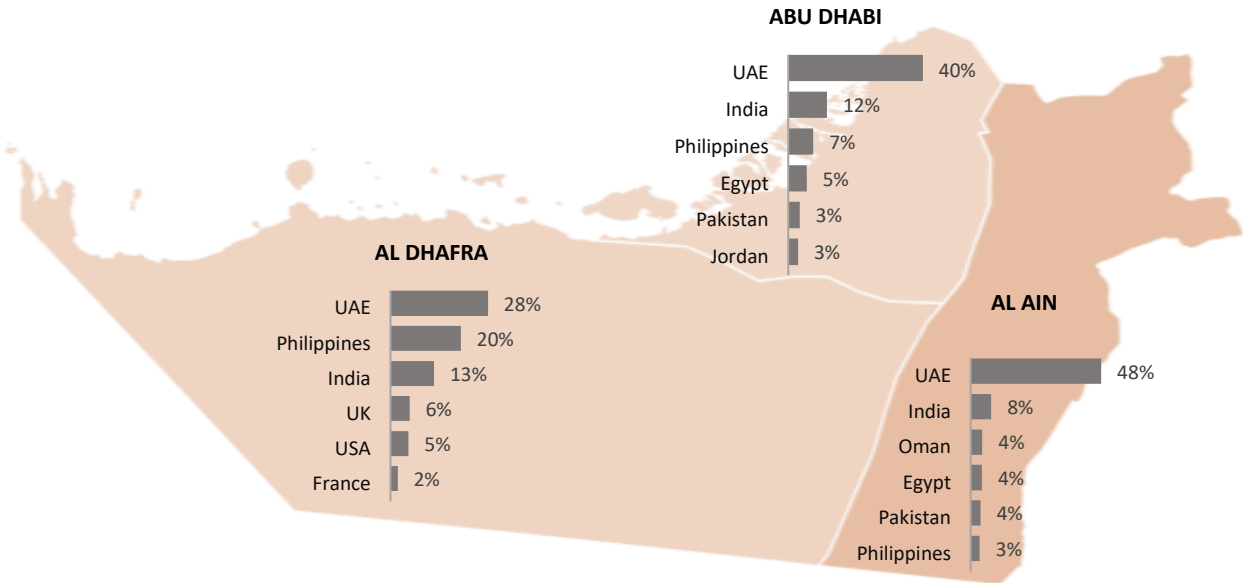
PERFORMANCE BY REGION

JANUARY 2021

REGIONAL PERFORMANCE

KEY INDICATORS	ABU DHABI			AL AIN		AL DHAFRA	
	Actual	% Change		Actual	% Change	Actual	% Change
GUESTS	203,831	-50.6%	▼	26,172	-40.8%	8,223	-40.8%
OCCUPANCY RATE	64%	-19.9%	▼	66%	-2.0%	44%	-24.5%
ALOS DAYS	3.6	32.0%	▲	2.8	53.9%	3.0	47.3%
REVENUES (M AED)	242.1	-48.6%	▼	19.3	-22.8%	15.2	-38.0%
ARR (AED)	257	-30.4%	▼	249	-9.9%	475	-42.7%
REVPAR (AED)	164	-44.2%	▼	164	-11.7%	210	-56.8%

TOP NATIONALITIES ACROSS REGIONS



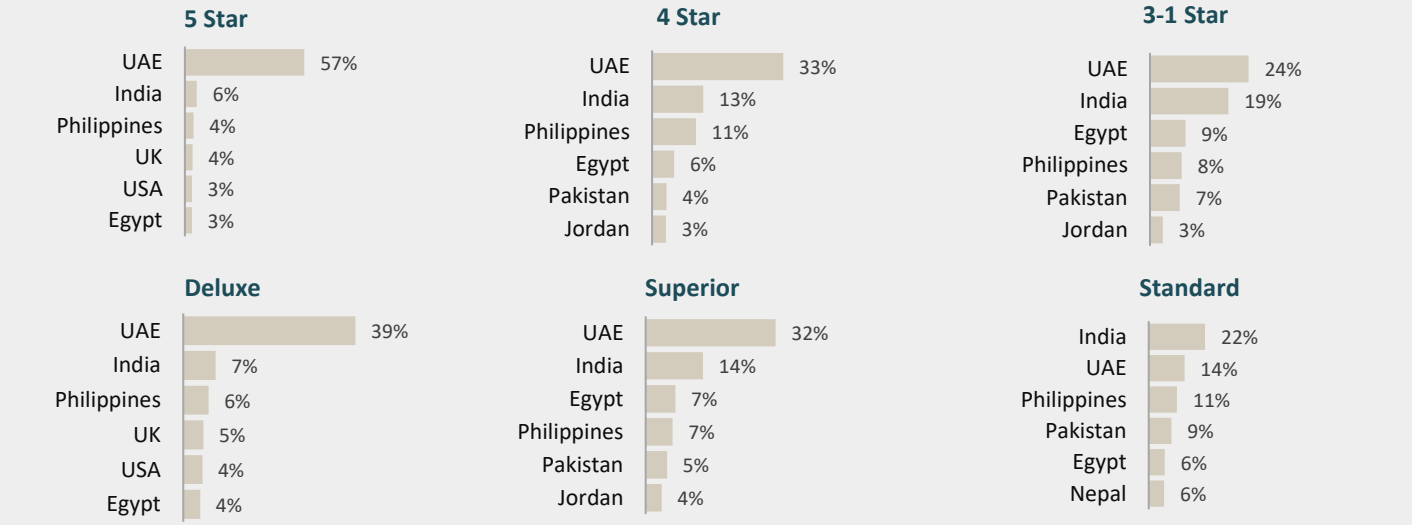
PERFORMANCE BY STAR RATING

JANUARY 2021

PERFORMANCE ACROSS KEY INDICATORS*

KEY INDICATORS	5 Star		4 Star		3-1 Star		Hotel Apts.	
	Actual	% Change	Actual	% Change	Actual	% Change	Actual	% Change
GUESTS	90,625	-59.5%	83,410	-40.4%	38,954	-45.7%	25,237	-27.5%
OCCUPANCY RATE	52%	-26.8%	73%	-13.9%	70%	-13.1%	76%	-13.1%
ALOS DAYS	3.4	+38.9%	2.6	+23.9%	3.1	+39.2%	7.0	+11.8%
REVENUES (M AED)	174.9	-51.1%	54.4	-36.1%	18.7	-45.3%	28.6	-35.2%
ARR (AED)	379	-30.5%	194	-23.3%	142	-30.8%	225	-19.5%
REVPAR (AED)	195	-49.1%	141	-34.0%	100	-39.9%	171	-30.0%

TOP NATIONALITIES*



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



YAS ISLAND PERFORMANCE

JANUARY 2021

HOTEL SUPPLY



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

TOP NATIONALITIES (000s)

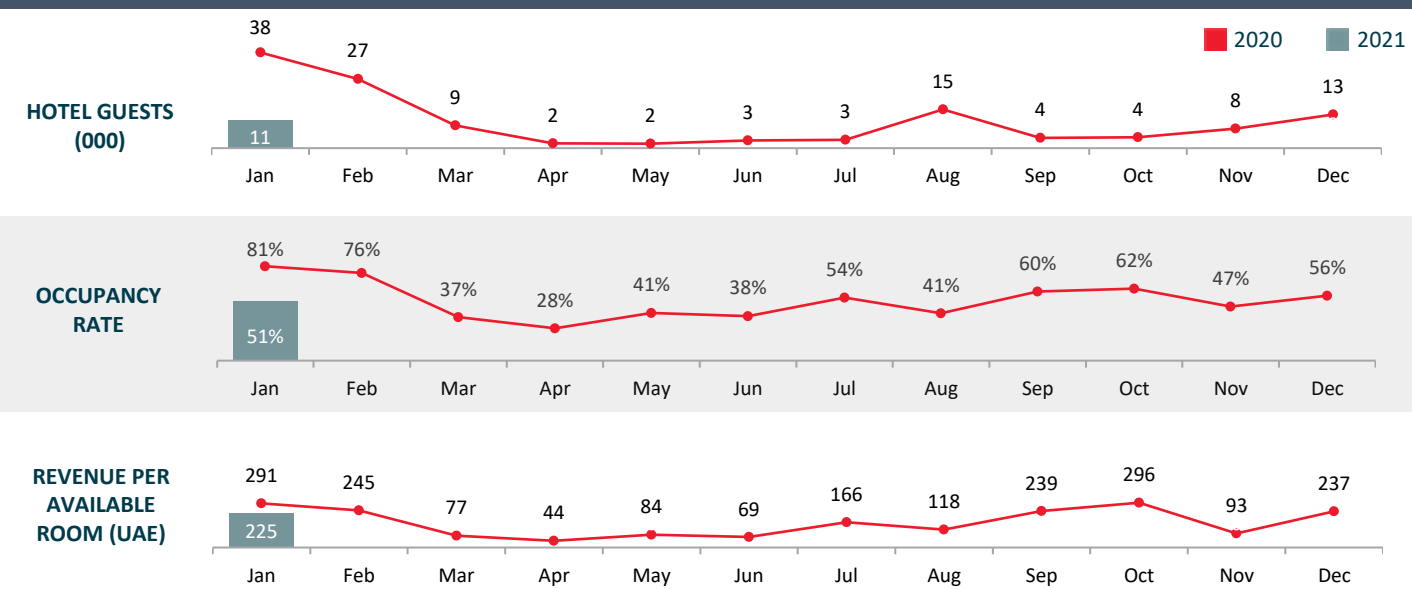
		% Change	% Share
UAE	3.5	-47.0%	31.5%
UK	1.0	-60.3%	9.3%
India	0.8	-86.4%	7.5%
Philippines	0.7	2.3%	6.0%
USA	0.6	-50.3%	5.9%
Egypt	0.4	-54.8%	3.3%
Pakistan	0.4	-22.1%	3.2%
Jordan	0.3	-45.8%	2.5%
South Africa	0.2	-69.8%	1.8%
Nepal	0.2	254.5%	1.8%
Kosovo	0.1	-	1.3%

OVERALL PERFORMANCE

KEY INDICATORS	JAN 2021	
	Actual	% Change
GUESTS	11,006	-70.9% ▼
OCCUPANCY RATE	51%	-36.5% ▼
ALOS NIGHTS	4.3	67.3% ▲
REVENUES (M AED)	21.3	-34.3% ▼
ARR (AED)	437	21.8% ▲
REVPAR (AED)	225	-22.7% ▼



MONTHLY TRENDS



SAADIYAT & NICHE AREAS PERFORMANCE

JANUARY 2021

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	JAN 2021	
	Actual	% Change
GUESTS	6,670	-44.2% ▼
OCCUPANCY RATE	24%	-58.4% ▼
ALOS NIGHTS	2.5	-46.3% ▼
REVENUES (M AED)	24.8	-62.3% ▼
ARR (AED)	1,259	16.2% ▲
REVPAR (AED)	299	-51.7% ▼

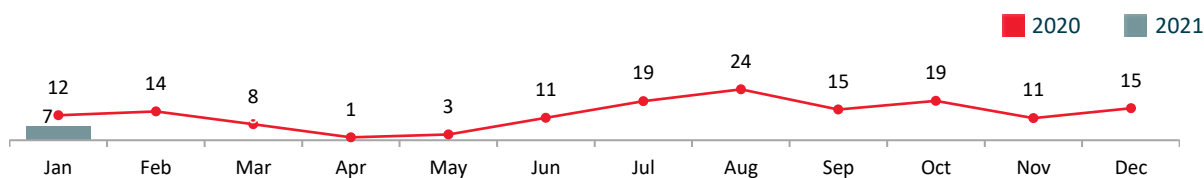
TOP NATIONALITIES (000s)

		% Change	% Share
UAE	4.3	94.8%	64.0%
UK	0.3	-67.3%	5.1%
Philippines	0.2	60.2%	2.8%
USA	0.2	-54.5%	2.4%
India	0.1	-52.5%	2.2%
Russia	0.1	-93.0%	1.7%
France	0.1	-79.5%	1.5%
Sri Lanka	0.1	425.0%	1.3%
Lebanon	0.1	-33.0%	1.1%
Egypt	0.1	-70.0%	1.0%
Canada	0.1	-22.4%	1.0%

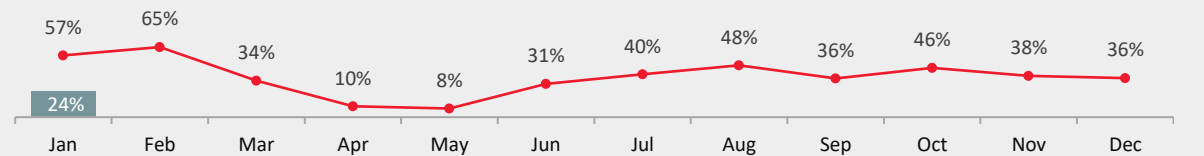


MONTHLY TRENDS

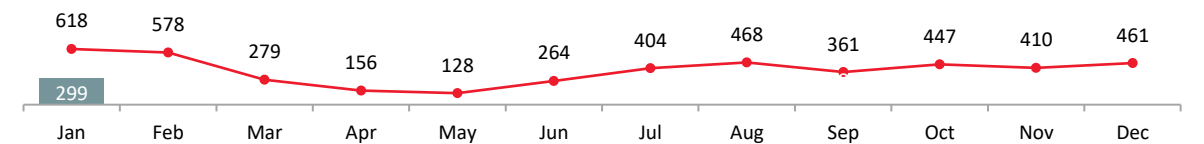
HOTEL GUESTS (000)



OCCUPANCY RATE



REVENUE PER AVAILABLE ROOM (UAE)



ADNEC PERFORMANCE

JANUARY 2021

HOTEL SUPPLY



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

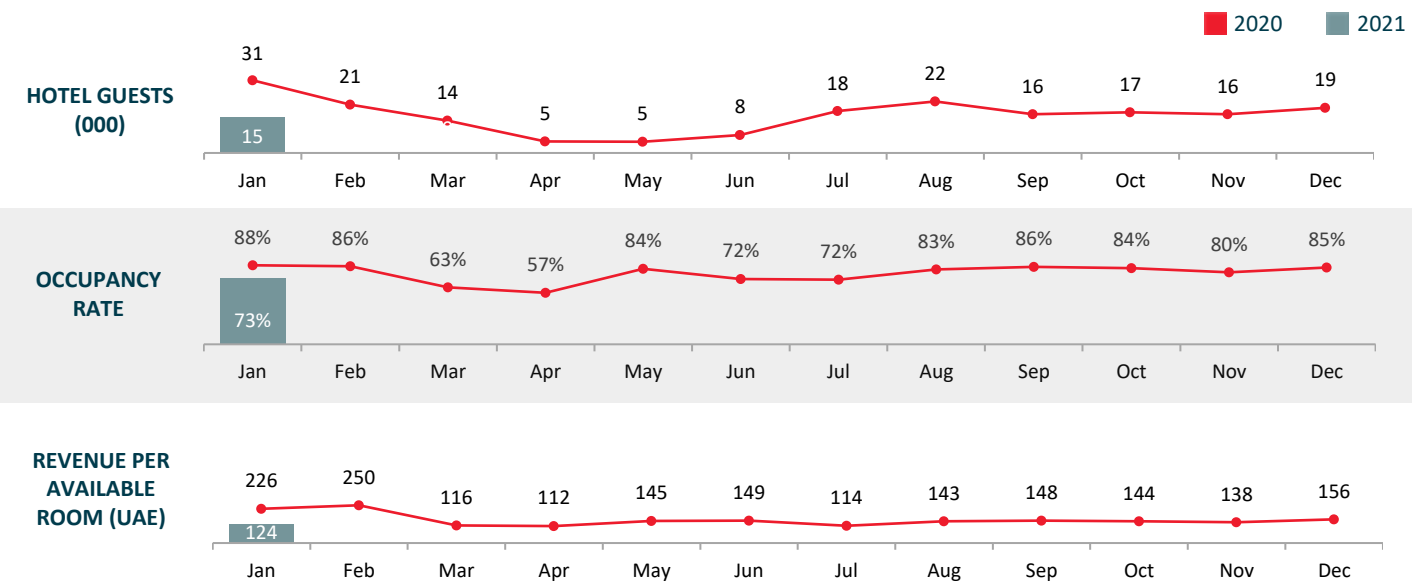
KEY INDICATORS	JAN 2021	
	Actual	% Change
GUESTS	14,845	-51.9% ▼
OCCUPANCY RATE	73%	-16.7% ▼
ALOS NIGHTS	4.1	46.9% ▲
REVENUES (M AED)	9.4	-46.1% ▼
ARR (AED)	170	-34.1% ▼
REVPAR (AED)	124	-45.1% ▼

TOP NATIONALITIES (000s)

		% Change	% Share
UAE	8.1	-24.7%	54.8%
Egypt	0.7	-43.8%	4.8%
Philippines	0.6	-14.5%	3.7%
Jordan	0.5	-27.1%	3.7%
India	0.5	-77.0%	3.3%
Pakistan	0.4	1.8%	2.7%
USA	0.3	-60.6%	2.0%
UK	0.3	-70.4%	1.8%
S. Korea	0.3	-11.1%	1.7%
Lebanon	0.2	-0.9%	1.6%
Syria	0.2	-43.2%	1.4%



MONTHLY TRENDS



ABU DHABI ISLAND PERFORMANCE

JANUARY 2021

HOTEL SUPPLY



116
HOTELS



23,086
ROOMS



STAR RATING	5 STAR	4 STAR	1-3 STAR	APTS
	36 HOTELS	23 HOTELS	21 HOTELS	36 HOTELS
	11,335 ROOMS	4,795 ROOMS	2,426 ROOMS	4,530 ROOMS

OVERALL PERFORMANCE

KEY INDICATORS	JAN 2021	
	Actual	% Change
GUESTS	171,310	-48.3% ▼
OCCUPANCY RATE	67%	-16.9% ▼
ALOS NIGHTS	3.6	33.0% ▲
REVENUES (M AED)	186.7	-47.5% ▼
ARR (AED)	228	-33.3% ▼
REVPAR (AED)	152	-44.6% ▼

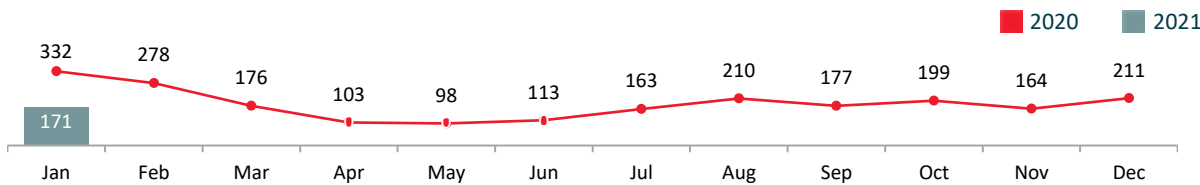
TOP NATIONALITIES (000s)

		% Change	% Share
UAE	65.8	-15.9%	38.4%
India	22.0	-25.9%	12.8%
Philippines	13.7	59.5%	8.0%
Egypt	10.0	-19.3%	5.8%
Pakistan	6.1	-9.4%	3.6%
Jordan	5.0	-40.1%	2.9%
UK	4.0	-71.8%	2.4%
USA	4.0	-74.0%	2.3%
Syria	3.0	-24.8%	1.7%
Morocco	2.3	-24.2%	1.3%
Yemen	1.8	7.1%	1.1%

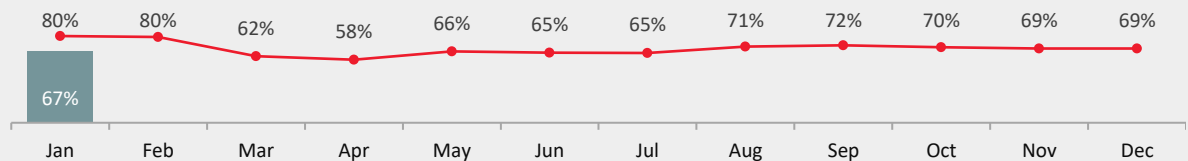


MONTHLY TRENDS

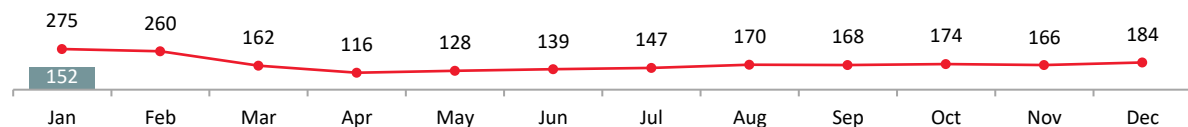
HOTEL GUESTS (000)



OCCUPANCY RATE



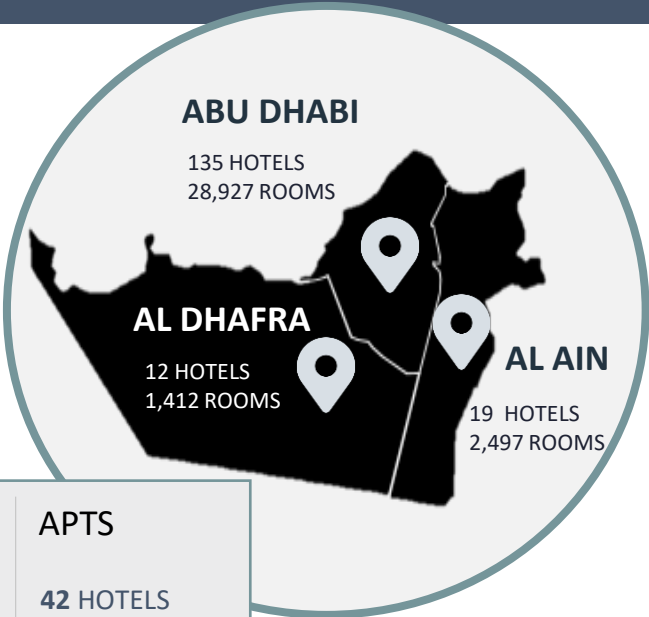
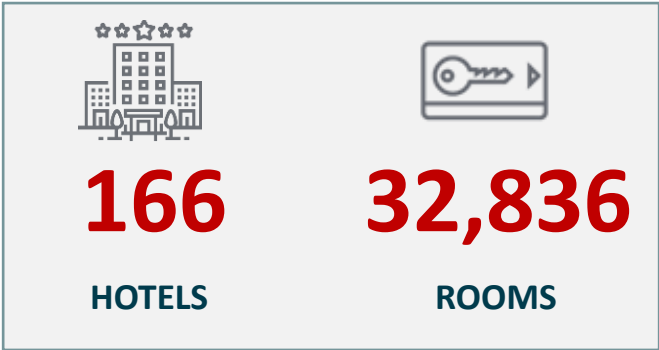
REVENUE PER AVAILABLE ROOM (UAE)



HOTEL SUPPLY

JANUARY 2021

HOTEL SUPPLY AS OF 31st JANUARY 2021



STAR RATING	5 STAR	4 STAR	3-1 STAR	APTS
	54 HOTELS 15,203 ROOMS	38 HOTELS 7,975 ROOMS	32 HOTELS 4,337 ROOMS	42 HOTELS 5,321 ROOMS

Quarantine Hotels: Since Jan 20, Radisson Blu Abu Dhabi hotel was again being used for quarantine, taking the total number of quarantine hotels from 6 in Dec 2020 to 7 in Jan 2021. Most of these hotels are currently accommodating medical staff & COVID patients. City seasons Al Ain hotel was the recent addition to the list (Feb 3), taking the total to 8 hotels as of Feb 16

Temporary Closed Hotels: In January, six hotels were temporarily closed, of which 4 hotels were closed at some point in January (984 rooms), while the remaining 2 hotels (225 rooms) remained closed for the entire month. As of Feb 16, these 2 hotels (Strand & Golden Tulip Al Jazira) continue to suspend their hotel operations

Yas Island Hotels: Between Jan 6 – Jan 24, three Hotels on Yas Island were under lockdown due to UFC 3.0 (W Yas, Crowne Plaza & Park Inn). Unlike the previous bubble events, where all hotels were closed for commercial business, the remaining 4 Yas hotels remained open to general public (Rotana, Radisson Blu, Centro & Staybridge). As of Jan 25, all 7 hotels in Yas Island were open for commercial business.

RECENT SUPPLY ADDITIONS AND CLOSURES - 2021

RECENT ADDITIONS

OPENED: JAN 2021

GRAVITY HOTEL

LOCATION: ABU DHABI ISLAND

TYPE: 3 STAR HOTEL

ROOMS: 73





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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