ABU DHABI

HOTEL PERFORMANCE REPORT

JULY 2020

دائرة الثقافة والسياحة
DEPARTMENT OF CULTURE AND TOURISM

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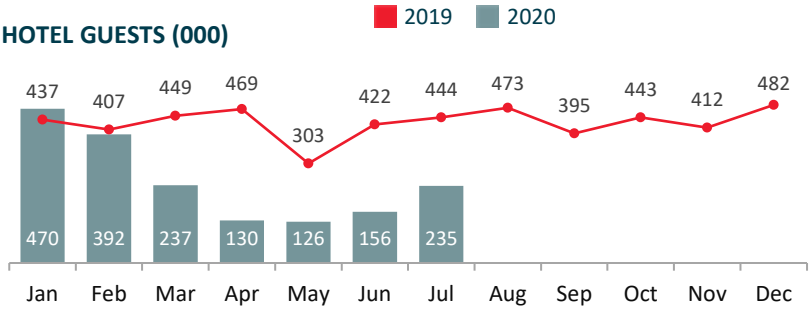
OVERALL PERFORMANCE

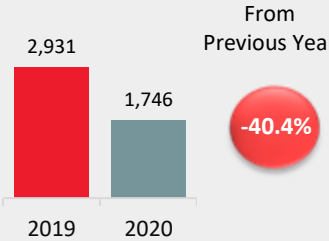
JULY 2020

HOTEL GUESTS (000)



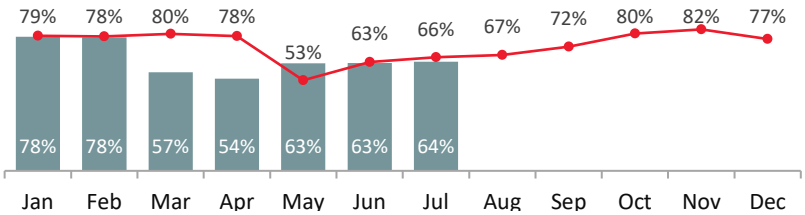
% Change (Jul 2020): -47.0%

YTD (JAN- JUL)

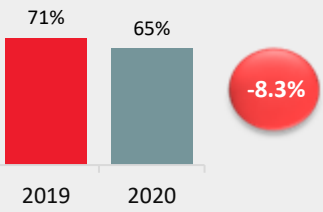


From Previous Year: -40.4%

OCCUPANCY RATE

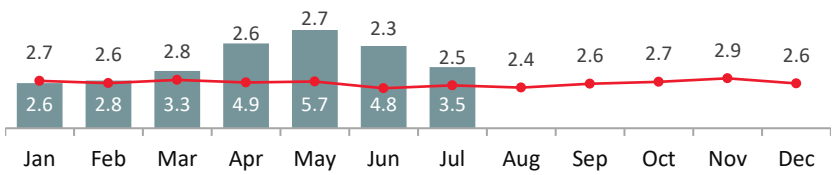


% Change (Jul 2020): -3.8%

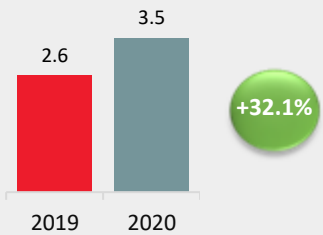


From Previous Year: -8.3%

AVERAGE LENGTH OF STAY (ALOS-NIGHTS)

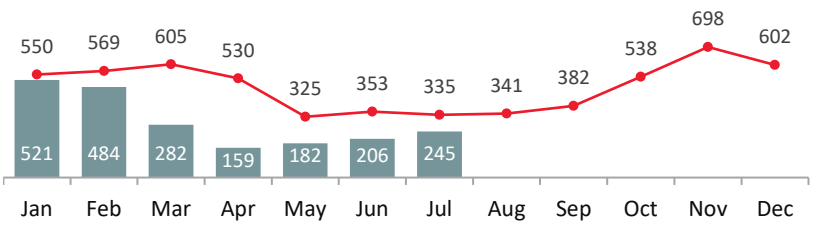


% Change (Jul 2020): +42.8%

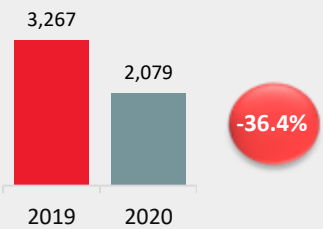


From Previous Year: +32.1%

HOTEL TOTAL REVENUE (MILLION AED)

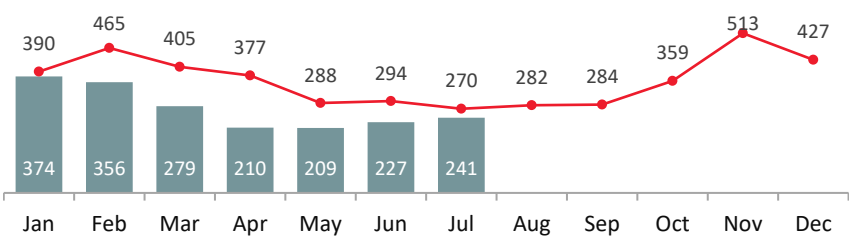


% Change (Jul 2020): -27.0%

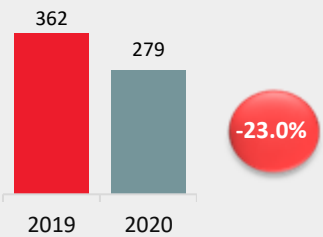


From Previous Year: -36.4%

AVERAGE ROOM RATE (AED)

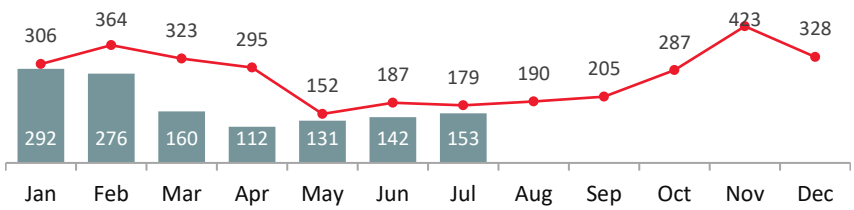


% Change (Jul 2020): -10.7%

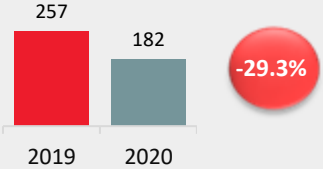


From Previous Year: -23.0%

REVENUE PER AVAILABLE ROOM (AED)



% Change (Jul 2020): -14.1%



From Previous Year: -29.3%

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HOTEL GUESTS BY NATIONALITY

JULY 2020

UAE VS. NON-UAE HOTEL GUESTS

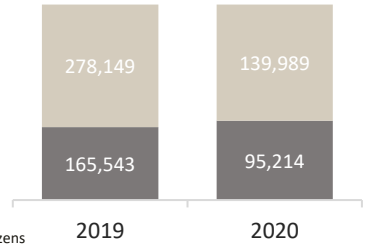
235,203 — UAE / Non UAE — **1,745,928**

TOTAL

-47.0%

From Previous Year

JUL 2020



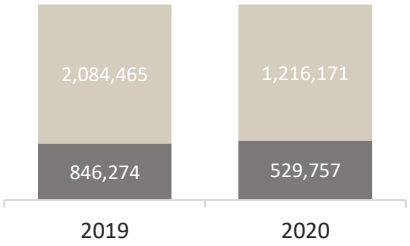
-49.7%

-42.5%

YTD (JAN- JUL) 2020

-41.7%

-37.4%



TOTAL

-40.4%

From Previous Year

*UAE refers to UAE citizens

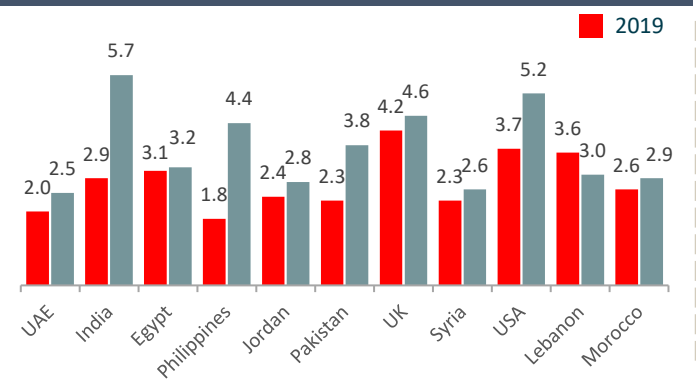
TOP 10 NON-UAE NATIONALITIES (000s) – JUL 2020

		% Change	% Share
India	24.3	-30.1%	10.3%
Egypt	14.4	-15.7%	6.1%
Philippines	14.0	-6.2%	5.9%
Jordan	9.6	-13.8%	4.1%
Pakistan	8.9	-19.8%	3.8%
UK	6.9	-57.1%	2.9%
Syria	5.8	-16.0%	2.5%
USA	5.8	-59.0%	2.5%
Lebanon	3.9	6.0%	1.7%
Morocco	3.0	-24.6%	1.3%

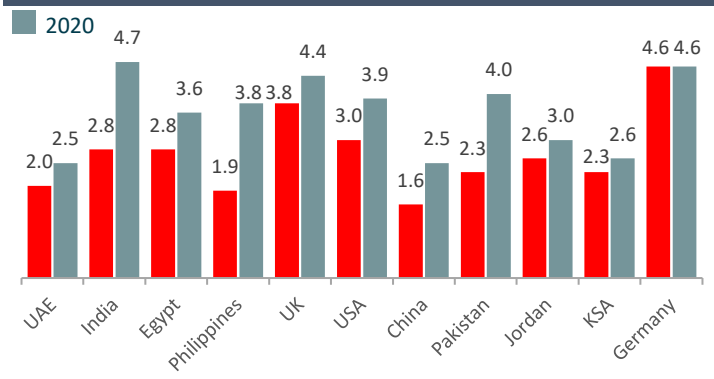
TOP 10 NON-UAE NATIONALITIES (000s) YTD JUL 2020

		% Change	% Share
India	195.9	-19.1%	11.2%
Egypt	84.2	-21.9%	4.8%
Philippines	80.9	-18.9%	4.6%
UK	69.4	-53.2%	4.0%
USA	62.2	-47.7%	3.6%
China	54.6	-77.3%	3.1%
Pakistan	52.3	-20.6%	3.0%
Jordan	47.1	-32.6%	2.7%
KSA	45.7	-49.9%	2.6%
Germany	29.7	-61.2%	1.7%

ALOS (NIGHTS) – JUL 2020



ALOS (NIGHTS) – YTD JUL 2020



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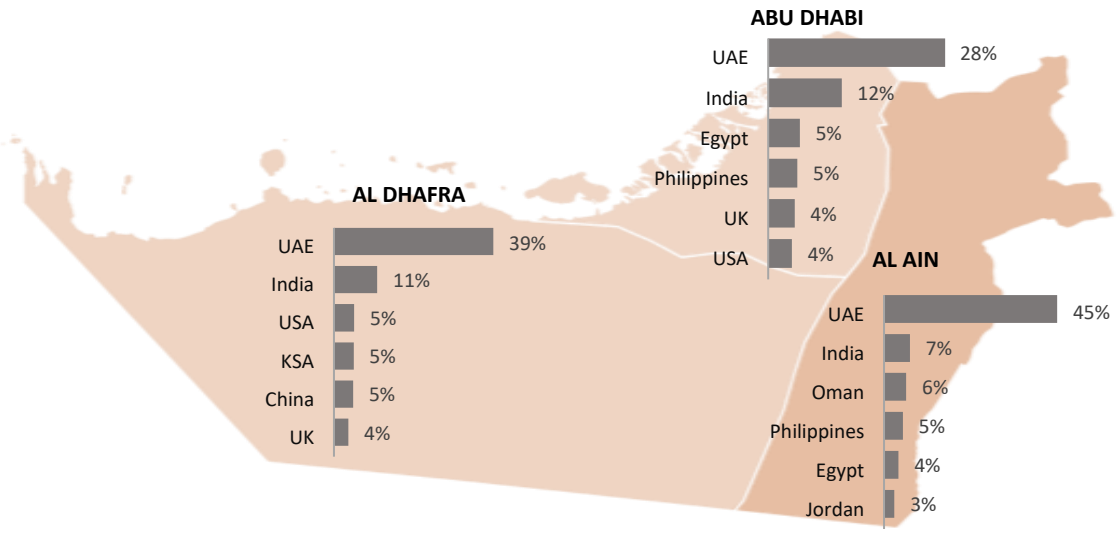
PERFORMANCE BY REGION

JULY 2020

REGIONAL PERFORMANCE – JUL 2020

KEY INDICATORS	ABU DHABI		AL AIN		AL DHAFRA	
	Actual	% Change	Actual	% Change	Actual	% Change
GUESTS	203,131	-48.4% ▼	22,923	-45.0% ▼	9,149	8.1% ▲
OCCUPANCY RATE	63%	-6.7% ▼	65%	12.9% ▲	75%	82.9% ▲
ALOS DAYS	3.7	43.1% ▲	2.8	61.5% ▲	2.6	16.2% ▲
REVENUES (M AED)	210.5	-30.7% ▼	14.8	-32.6% ▼	19.6	107.9% ▲
ARR (AED)	238	-11.6% ▼	218	-10.3% ▼	394	-6.2% ▼
REVPAR (AED)	150	-17.5% ▼	143	1.3% ▲	296	71.5% ▲

TOP NATIONALITIES ACROSS REGIONS – YTD JUL 2020



REGIONAL PERFORMANCE – YTD JUL 2020

KEY INDICATORS	ABU DHABI		AL AIN		AL DHAFRA	
	Actual	% Change	Actual	% Change	Actual	% Change
GUESTS	1,513,912	-41.1% ▼	172,808	-38.3% ▼	59,208	-26.5% ▼
OCCUPANCY RATE	66%	-10.0% ▼	60%	-0.6% ▼	64%	40.1% ▲
ALOS DAYS	3.6	33.5% ▲	2.4	24.5% ▲	2.6	21.1% ▲
REVENUES (M AED)	1,831.6	-38.1% ▼	106.0	-37.2% ▼	140.9	1.5% ▲
ARR (AED)	275	-23.5% ▼	214	-23.6% ▼	568	-18.3% ▼
REVPAR (AED)	180	-31.2% ▼	128	-24.1% ▼	365	14.5% ▲

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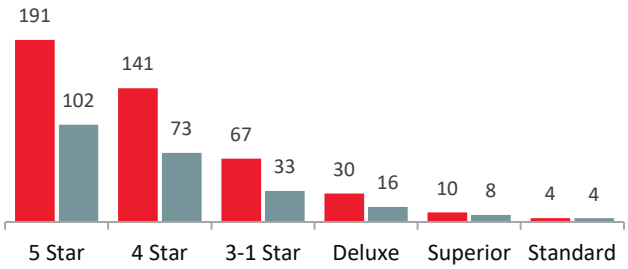
PERFORMANCE BY STAR RATING

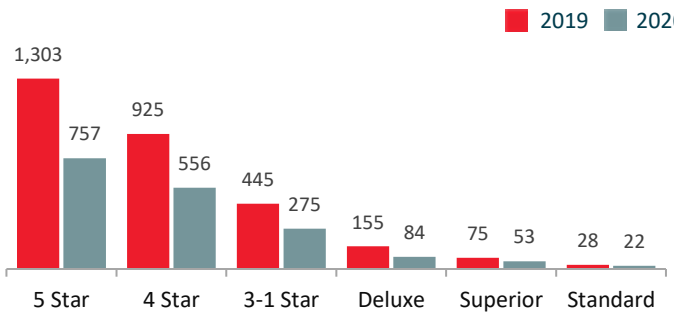
JULY 2020

PERFORMANCE ACROSS KEY INDICATORS

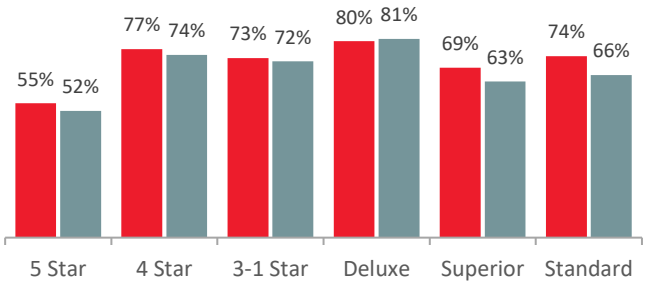
HOTEL GUESTS – JUL 2020



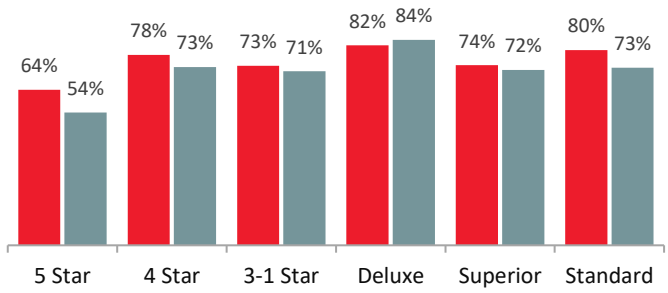
HOTEL GUESTS – YTD JUL 2020



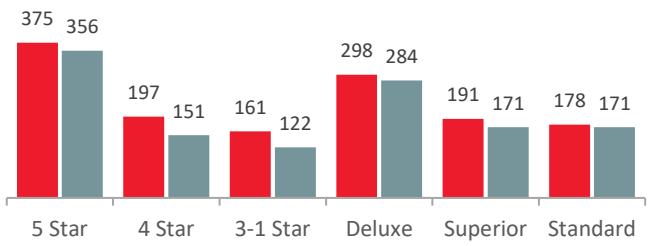
HOTEL OCCUPANCY– JUL 2020



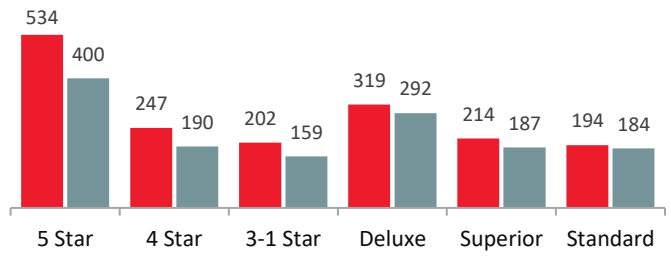
HOTEL OCCUPANCY – YTD JUL 2020



HOTEL ARR (AED)– JUL 2020

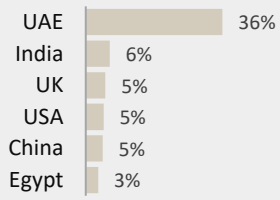


HOTEL ARR (AED) –YTD JUL 2020

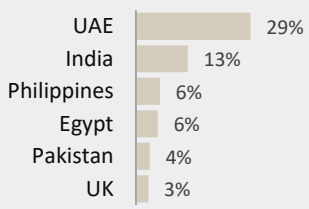


TOP NATIONALITIES – YTD JUL 2020

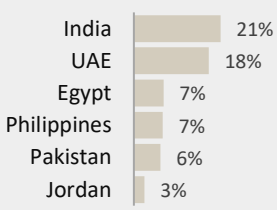
5 Star



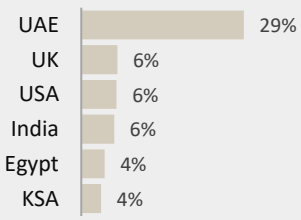
4 Star



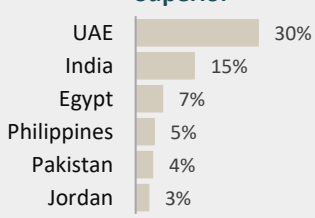
3 -1 Star



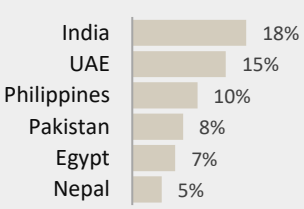
Deluxe



Superior



Standard



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YAS ISLAND PERFORMANCE

JULY 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

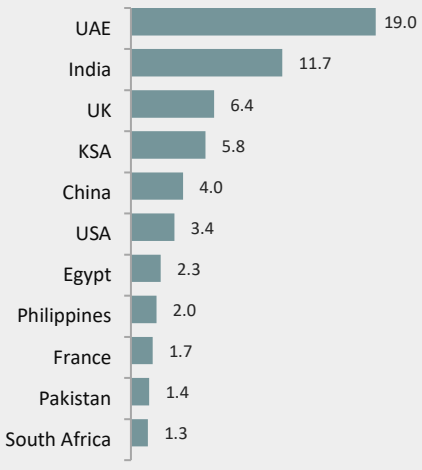
KEY INDICATORS	JUL 2020 Actual	JUL 2020 % Change	YTD JUL 2020 Actual	YTD JUL 2020 % Change
GUESTS	3,298	-92.6% ▼	83,854	-65.4% ▼
OCCUPANCY RATE	54%	-29.8% ▼	52%	-33.7% ▼
ALOS NIGHTS	15.0	579.6% ▲	3.8	50.8% ▲
REVENUES (M AED)	5.8	-75.4% ▼	89.5	-58.7% ▼
ARR (AED)	70	-74.7% ▼	225	-34.0% ▼
REVPAR (AED)	38	-82.2% ▼	118	-56.2% ▼

Since July 30, hotels in Yas Island have resumed taking new bookings after being closed to general public for more than a month due to UFC 251 precautionary measures.

TOP NATIONALITIES (000s) – JUL 2020

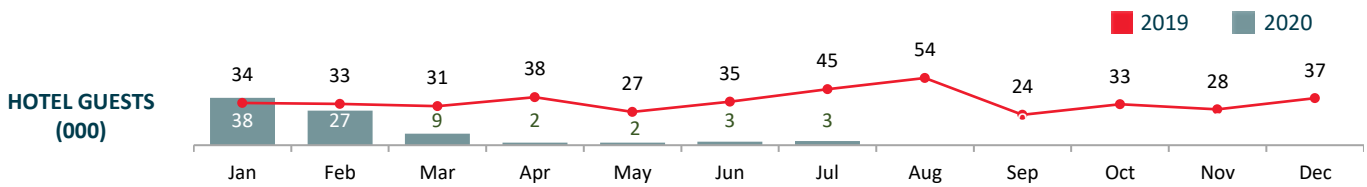
	% Change	Share %
UAE	-97.6%	12.1%
Egypt	-70.5%	9.7%
USA	-73.3%	8.4%
Philippines	-78.9%	7.5%
UK	-90.5%	6.3%
Nepal	580.0%	6.2%
Pakistan	-85.0%	6.1%
India	-95.4%	5.0%
Syria	-78.5%	4.4%
Jordan	-87.4%	3.3%
Brazil	-19.5%	3.1%

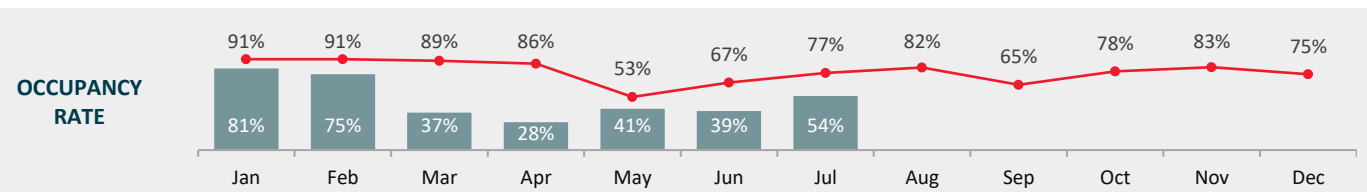
TOP NATIONALITIES (000s) – YTD JUL 2020

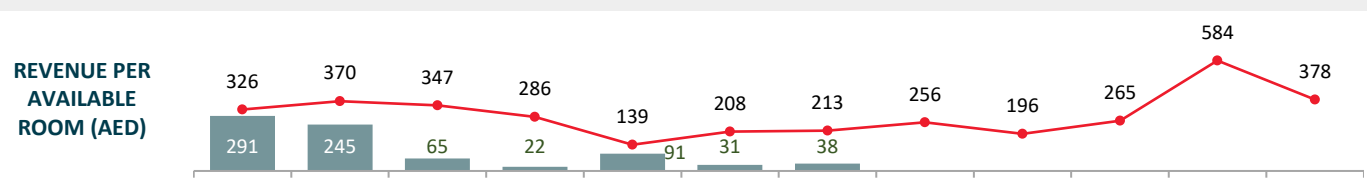


	% Change	% Share
UAE	-68.0%	22.6%
India	-61.0%	14.0%
UK	-67.6%	7.7%
KSA	-54.0%	6.9%
China	-76.1%	4.8%
USA	-61.4%	4.0%
Egypt	-60.9%	2.7%
Philippines	-77.9%	2.3%
France	-46.9%	2.0%
Pakistan	-69.6%	1.7%
South Africa	-62.3%	1.6%

MONTHLY TRENDS







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SAADIYAT & NICHE AREAS PERFORMANCE

JULY 2020

HOTEL SUPPLY

6 HOTELS

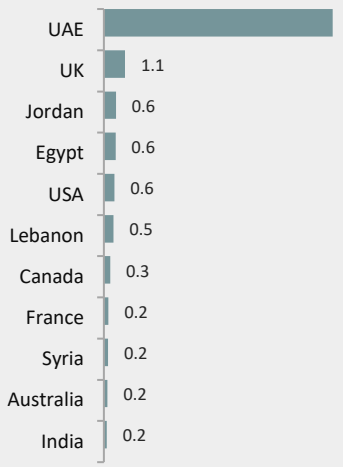
1,755 ROOMS

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

OVERALL PERFORMANCE

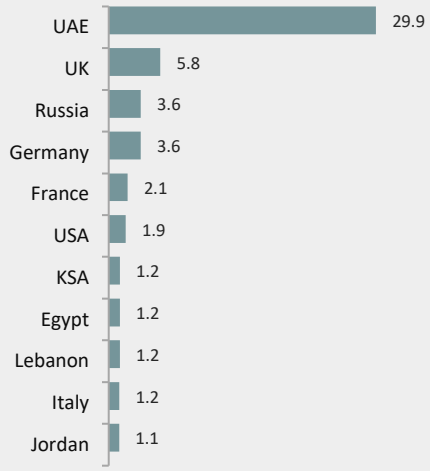
KEY INDICATORS	JUL 2020 Actual	JUL 2020 % Change	YTD JUL 2020 Actual	YTD JUL 2020 % Change
GUESTS	18,705	30.4% ▲	66,883	-29.4% ▼
OCCUPANCY RATE	40%	-9.1% ▼	36%	-41.5% ▼
ALOS NIGHTS	1.8	-40.8% ▼	3.2	-24.3% ▼
REVENUES (M AED)	32.4	8.1% ▲	230.0	-41.8% ▼
ARR (AED)	1,022	25.2% ▲	991	-5.5% ▼
REVPAR (AED)	404	13.8% ▲	358	-44.7% ▼

TOP NATIONALITIES (000s) – JUL 2020



	% Change	% Share
UAE	48.8%	64.1%
UK	-6.8%	6.0%
Jordan	466.7%	3.4%
Egypt	500.0%	3.3%
USA	314.1%	3.0%
Lebanon	302.4%	2.7%
Canada	420.3%	1.8%
France	105.1%	1.3%
Syria	190.8%	1.2%
Australia	32.9%	1.0%
India	-23.8%	0.8%

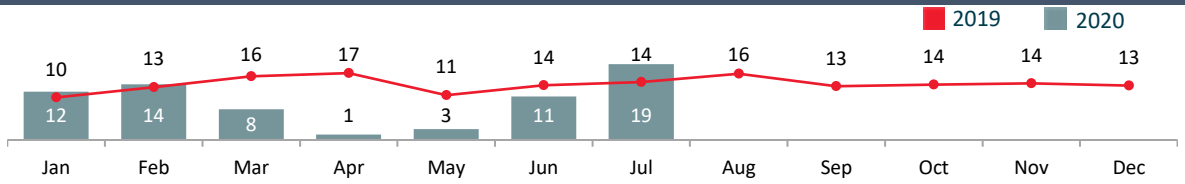
TOP NATIONALITIES (000s) – YTD JUL 2020



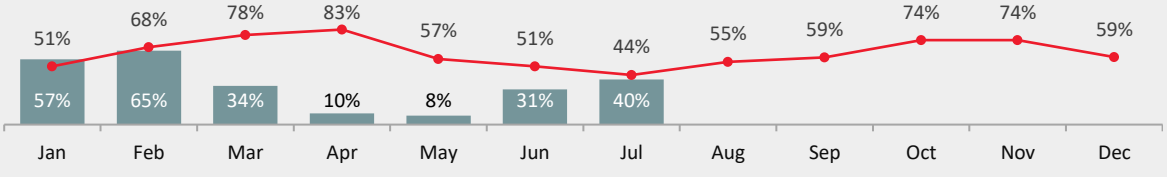
	Change %	Share %
UAE	18.8%	44.6%
UK	-46.6%	8.6%
Russia	-41.6%	5.3%
Germany	-67.8%	5.3%
France	-33.1%	3.1%
USA	-27.6%	2.8%
KSA	-46.0%	1.8%
Egypt	20.2%	1.8%
Lebanon	-3.3%	1.8%
Italy	-58.1%	1.8%
Jordan	24.4%	1.7%

MONTHLY TRENDS

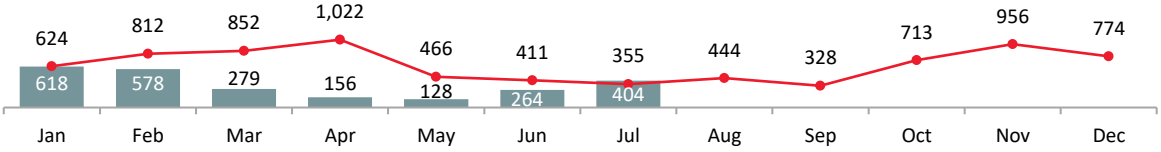
HOTEL GUESTS (000)



OCCUPANCY RATE



REVENUE PER AVAILABLE ROOM (AED)



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ADNEC PERFORMANCE

JULY 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	JUL 2020 Actual	JUL 2020 % Change	YTD JUL 2020 Actual	YTD JUL 2020 % Change
GUESTS	17,772	-51.5% ▼	100,112	-46.4% ▼
OCCUPANCY RATE	72%	-10.6% ▼	75%	-7.6% ▼
ALOS NIGHTS	3.9	-0.8% ▼	4.4	42.5% ▲
REVENUES (M AED)	9.5	-13.4% ▼	88.1	-21.3% ▼
ARR (AED)	158	-8.9% ▼	211	-18.4% ▼
REVPAR (AED)	114	-18.6% ▼	158	-24.6% ▼

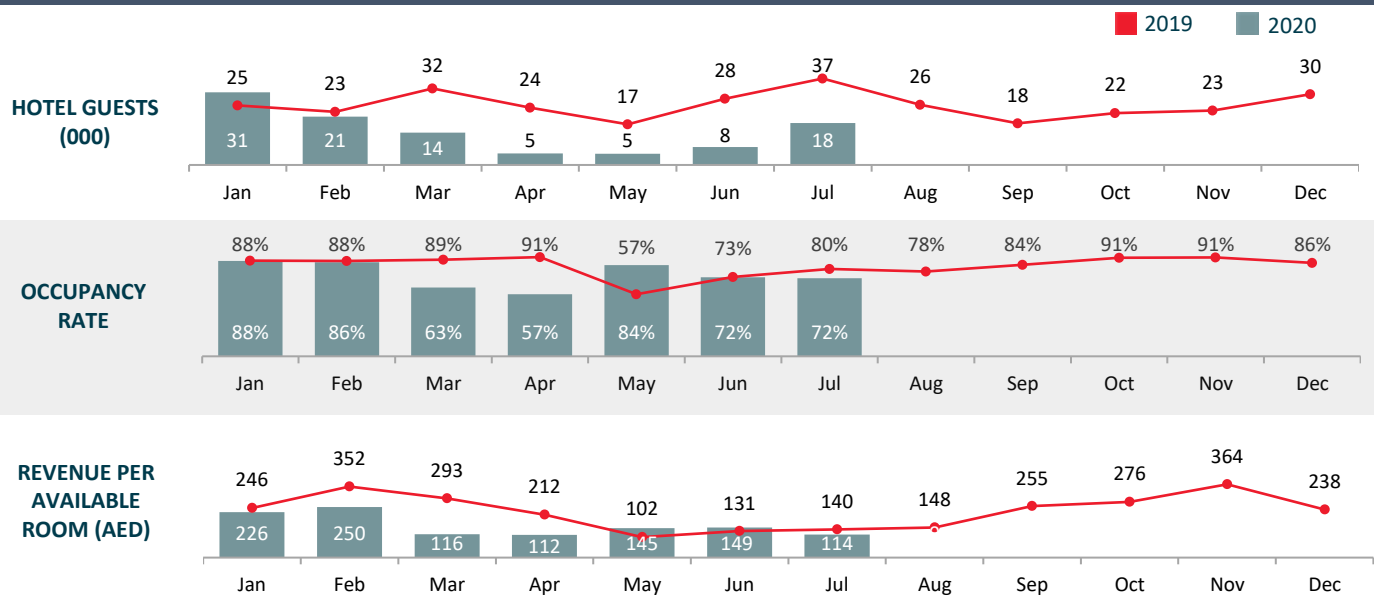
TOP NATIONALITIES (000s) – JUL 2020

		% Change	% Share
UAE	9.2	-43.1%	51.9%
India	1.3	-39.1%	7.4%
Egypt	1.0	-38.5%	5.4%
Jordan	0.7	-37.4%	4.0%
Philippines	0.7	-50.1%	4.0%
Pakistan	0.5	-41.1%	3.0%
Syria	0.5	-34.4%	2.5%
UK	0.4	-57.4%	2.1%
USA	0.3	-62.7%	1.6%
Palestine	0.2	-27.7%	1.2%
Lebanon	0.2	-39.5%	1.2%

TOP NATIONALITIES (000s) – YTD JUL 2020

		% Change	% Share
UAE	40.1	-39.2%	40.0%
India	7.9	-33.7%	7.9%
Egypt	5.0	-37.9%	5.0%
KSA	3.7	-42.5%	3.7%
Philippines	3.6	-53.7%	3.6%
Pakistan	3.2	-35.3%	3.2%
China	3.1	-77.1%	3.1%
Jordan	3.0	-47.5%	3.0%
USA	2.7	-48.8%	2.7%
UK	2.5	-55.6%	2.5%
Syria	1.6	-43.5%	1.6%

MONTHLY TRENDS



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ABU DHABI ISLAND PERFORMANCE

JULY 2020

HOTEL SUPPLY

117 HOTELS

23,123 ROOMS

STAR RATING	5 STAR	4 STAR	1-3 STAR	APTS
	36 HOTELS	23 HOTELS	20 HOTELS	38 HOTELS
	11,317 ROOMS	4,795 ROOMS	2,353 ROOMS	4,658 ROOMS

OVERALL PERFORMANCE

KEY INDICATORS	JUL 2020 Actual	JUL 2020 % Change	YTD JUL 2020 Actual	YTD JUL 2020 % Change
GUESTS	163,356	-45.2% ▼	1,263,063	-38.3% ▼
OCCUPANCY RATE	65%	-3.8% ▼	68%	-6.1% ▼
ALOS NIGHTS	3.6	49.4% ▲	3.6	35.7% ▲
REVENUES (M AED)	162.8	-32.0% ▼	1,424.0	-36.3% ▼
ARR (AED)	226	-10.3% ▼	258	-21.5% ▼
REVPAR (AED)	147	-13.7% ▼	175	-26.3% ▼

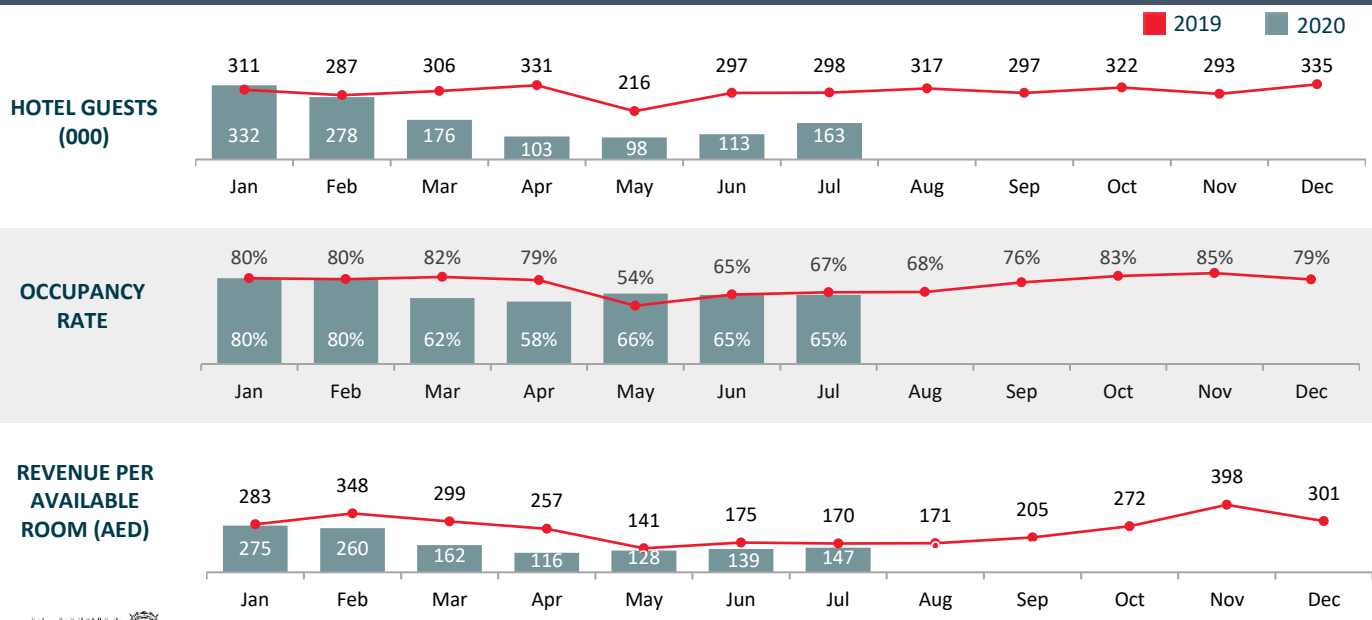
TOP NATIONALITIES (000s) – JUL 2020

		% Change	% Share
UAE	58.3	-41.3%	35.7%
India	20.0	-25.4%	12.3%
Egypt	11.3	-12.7%	6.9%
Philippines	10.9	-1.8%	6.7%
Jordan	7.0	-10.0%	4.3%
Pakistan	6.9	-12.4%	4.3%
UK	4.6	-59.2%	2.8%
Syria	4.3	0.0%	2.6%
USA	4.1	-64.2%	2.5%
Lebanon	2.9	12.5%	1.8%
Morocco	2.3	-20.2%	1.4%

TOP NATIONALITIES (000s) – YTD JUL 2020

		% Change	% Share
UAE	339.6	-37.3%	26.9%
India	157.3	-10.8%	12.5%
Egypt	68.1	-17.6%	5.4%
Philippines	64.6	-12.6%	5.1%
USA	49.2	-47.6%	3.9%
UK	49.2	-52.2%	3.9%
China	43.4	-78.0%	3.4%
Pakistan	41.7	-15.0%	3.3%
Jordan	35.8	-29.0%	2.8%
KSA	29.3	-47.8%	2.3%
Germany	21.7	-57.8%	1.7%

MONTHLY TRENDS



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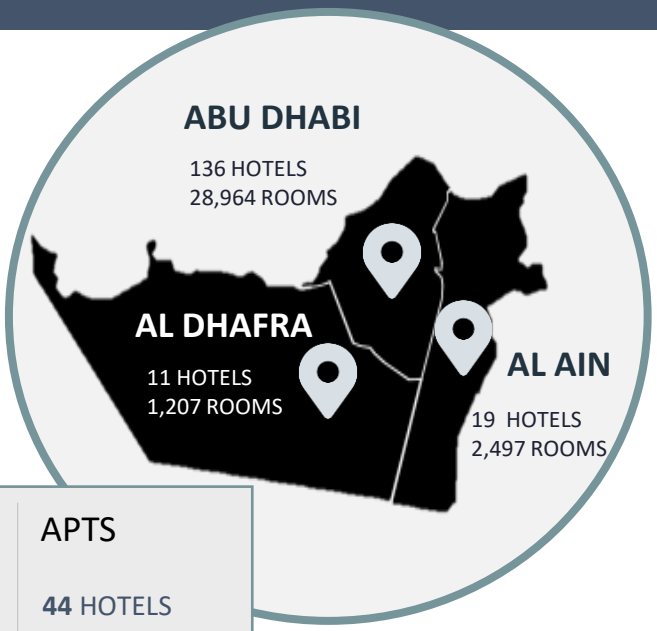
HOTEL SUPPLY
JULY 2020

HOTEL SUPPLY AS OF JULY 2020

166 HOTELS

32,668 ROOMS



STAR RATING	5 STAR	4 STAR	1-3 STAR	APTS
	54 HOTELS **15,185** ROOMS	**37** HOTELS **7,770** ROOMS	**31** HOTELS **4,264** ROOMS	**44** HOTELS **5,449** ROOMS

Quarantine Hotels: In July, only 4 properties across the Abu Dhabi emirate were used at some point for quarantine purposes. As of August 16, two hotels are currently being used for quarantine purposes.

Temporary Closed Hotels: 11 hotels were temporarily closed in July, of which 8 hotels (1,030 rooms) remained closed for the entire month, while the remaining 3 hotels were closed for the last two days in July.

Yas Island Hotels: Since July 30, hotels in Yas Island have resumed taking new bookings after being closed to general public for more than a month due to UFC 251 precautionary measures.

RECENT SUPPLY ADDITIONS AND CLOSURES - 2020

CLOSED: JAN 2020

BIN MAJID TOWER 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

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GLOSSARY

JULY 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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