

HOTEL REPORT

JULY 2018



28 August, 2018

دائرة الثقافة والسياحة
DEPARTMENT OF CULTURE
AND TOURISM



Dear friends,

The July figures for hotel performance allow us to reflect on some recent collective success and at the same time afford an opportunity to take stock and be ready for the challenge of the next six months.

Thanks to all your combined efforts, Abu Dhabi continues on track to set a new benchmark visitor figure for the year. For the period between January and July 2018, we can report a 5.1% increase in the number of hotel guests staying in Abu Dhabi compared with the same period in 2017. In total, 421,000 hotel guests were recorded in the emirate's 162 hotels and hotel apartments compared to 402,000 a year ago.

Testament to the emirate's growing appeal to international visitors, non-UAE guests staying at our hotels registered an increase of 5.1% for the period between January and July 2018 compared to the same period in 2017. The latest figures also show that the July arrivals are driven by increases in uptake from Saudi Arabia, the United States, and India, with these countries posting significant percentage growth, respectively contributing 21,700, 14,500, and 30,700 guests. When comparing YTD 2018, China recorded an impressive increase of 13.8%, India 17.8% and the United States 24.6% on the year.

The influx of additional Saudi guests can naturally be attributed to the start of the summer vacation with Abu Dhabi hosting Abu Dhabi Summer Season (ADSS) and this being a key factor the emirate hosting 24.5% more guests from KSA over July 2017. This growth in numbers is indicative of Abu Dhabi's ongoing efforts to strengthen ties with the Kingdom of Saudi Arabia and attract an increased number of Saudi travellers.

The emirate's popularity amongst Chinese visitors recovered in July 2018 and registered a small growth of 0.3%. While India is the largest overseas market for this month, China still represents Abu Dhabi's largest source of international guests in 2018 to date with a total of 242,700 arrivals, a 13.8% increase for the year.

On a less positive note, UK numbers registered a decline of 19.6% in July 2018 compared to July 2017. Conversely, it still maintains a healthy position as one of the top three overseas source markets for guests, with an overall 8.5% increase on a year-to-date basis.

In terms of main visitation purpose, vacations and business tourism still lead, growing at 50% and 31% respectively in July 2018 compared to the same month in 2017. On a year-to-date basis, the figures are consistent, with vacations and business recording 51% and 30% respectively, with healthy contributions from MICE and shopping, among others.

Regionally speaking, hotel guest numbers were positive for the month in Abu Dhabi City (4.4%), Al Ain (4.6%) and Al Dhafra (28.2%). Occupancy Rates were also in positive territory in all three regions (4.3%, 7.9% and 9.3% respectively).

While we have recorded notable achievements in July, we must continue to work together in the face of challenges. Revenue per Available Room (RevPAR) improved only slightly by around 0.02% compared to July 2017. Hotel Total Revenues and Average Room Rate (ARR) have not moved. This is the reality of our challenge; year to date, Hotel Revenues are down 3.6%, ARR is down 6.4% and RevPAR is down 4.3%.

As we head into the Winter season with several festivals and events lined up, DCT Abu Dhabi will maintain the momentum we have already generated in 2018, with our traditionally strong line-up of events such as Abu Dhabi Food Festival and the Formula One Etihad Airways Grand Prix adding impetus to our efforts.

Yours sincerely,

Saif Saeed Ghobash

Undersecretary, Department of Culture & Tourism – Abu Dhabi

TABLE OF CONTENTS



OVERALL PERFORMANCE

PAGE 1



HOTEL GUESTS

PAGE 2



PERFORMANCE BY REGION

PAGE 3



PERFORMANCE BY STAR RATING

PAGE 4



UPCOMING EVENTS

PAGE 5



DCT NEWS

PAGE 6



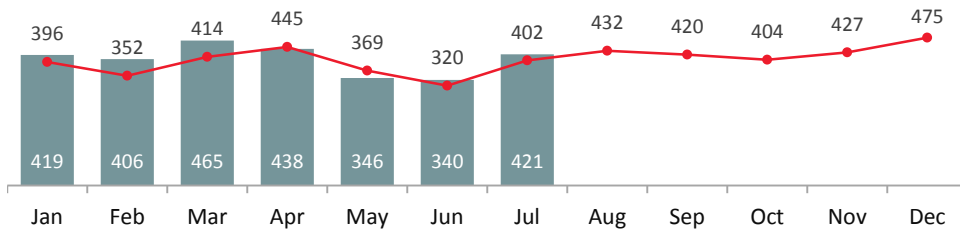
GLOSSARY

PAGE 7

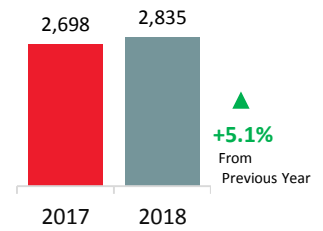
2017 2018

162 Hotels with 31,545 rooms

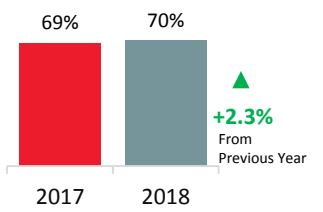
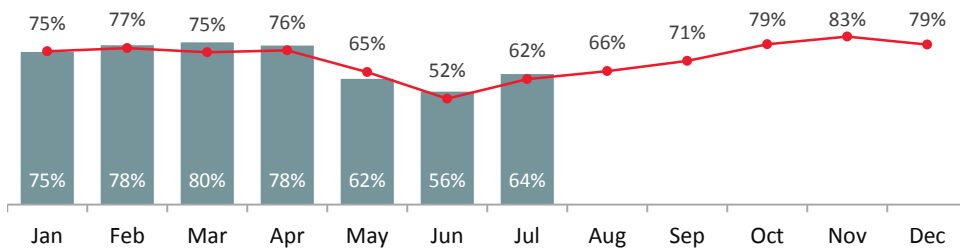
HOTEL GUESTS (000)



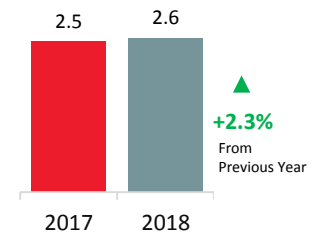
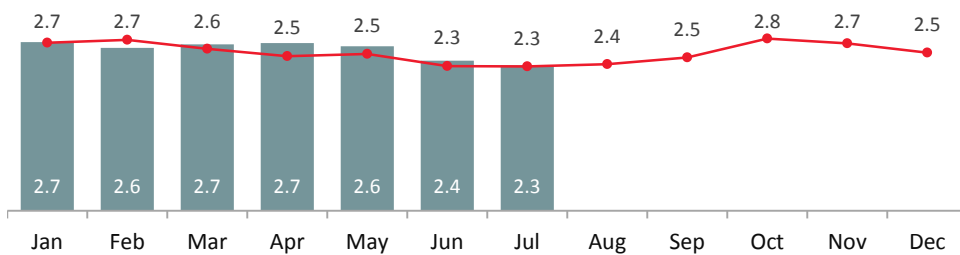
YTD (JAN-JUL)



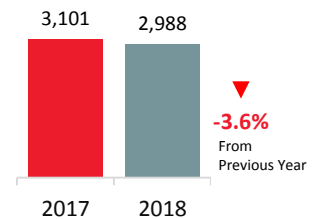
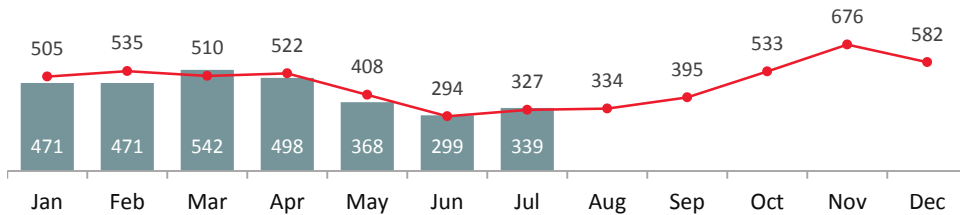
OCCUPANCY RATE



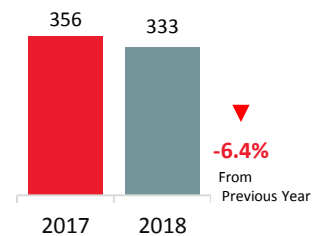
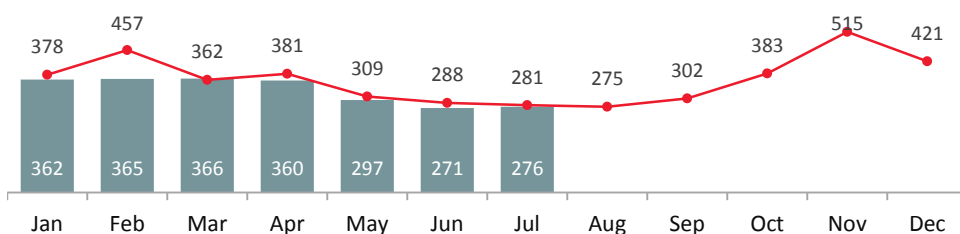
AVERAGE LENGTH OF STAY (ALOS-DAYS)



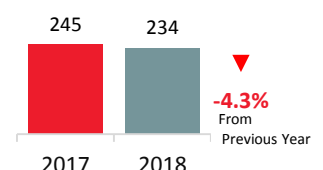
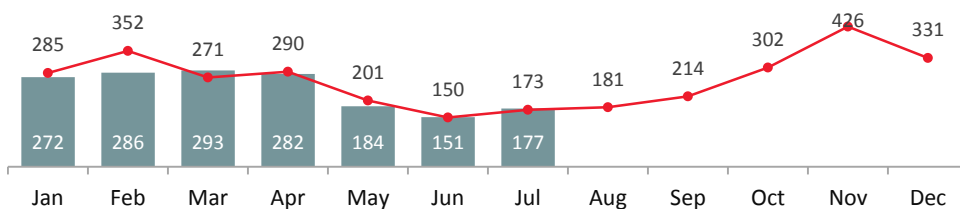
HOTEL TOTAL REVENUE (MILLION UAE)



AVERAGE ROOM RATE (UAE)



REVENUE PER AVAILABLE ROOM (UAE)



JULY 2018

HOTEL GUESTS

421,275

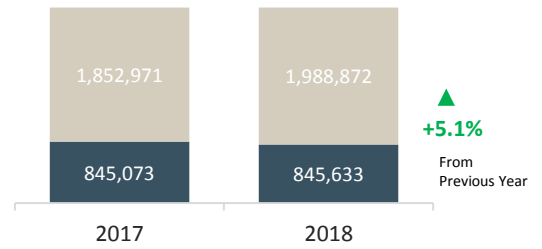
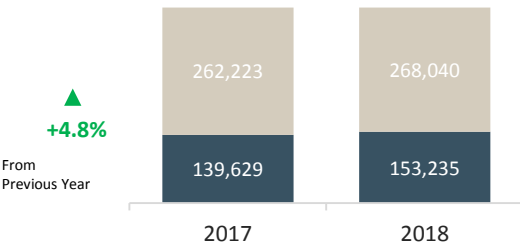
HOTEL GUESTS

JULY 2018

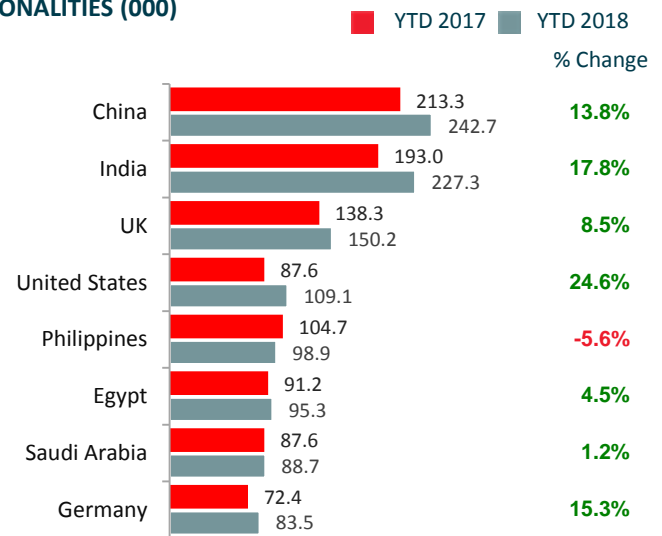
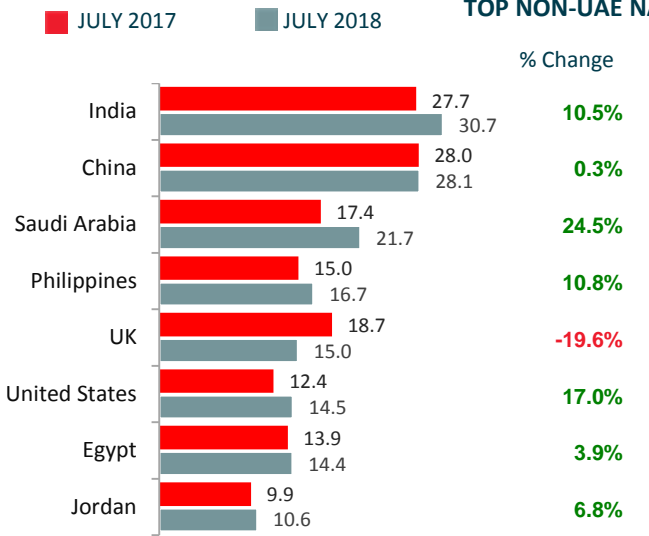
YTD (JAN- JUL) 2018

2,834,505

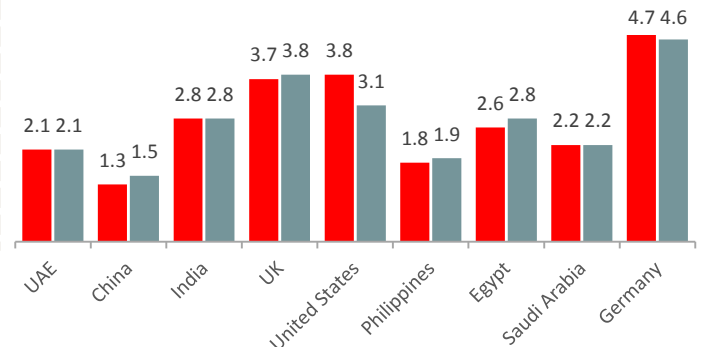
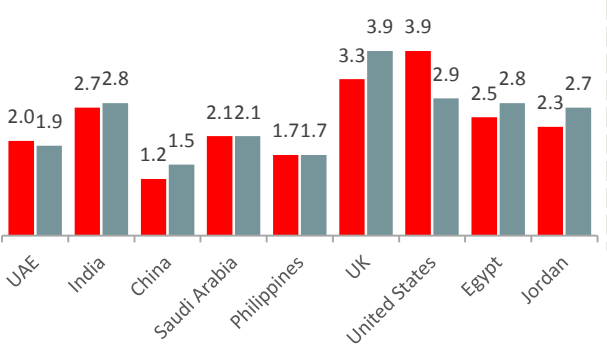
HOTEL GUESTS



TOP NON-UAE NATIONALITIES (000)



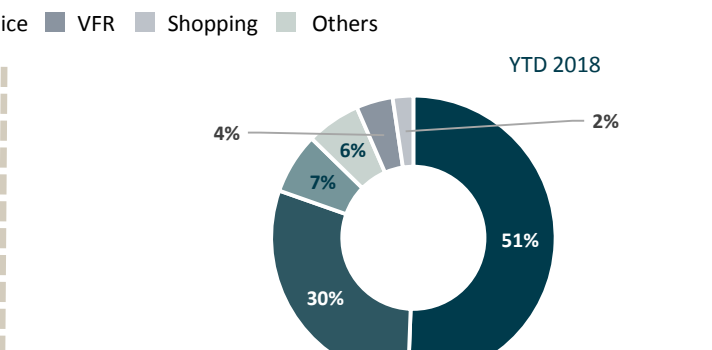
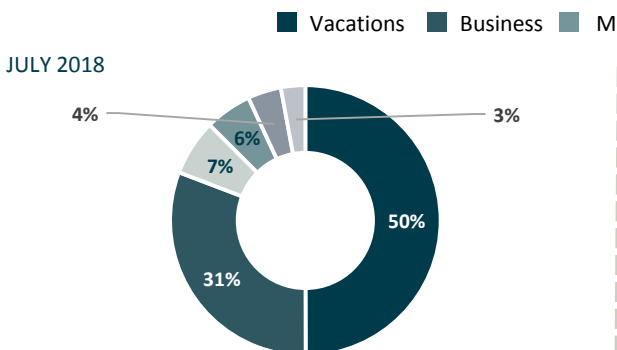
ALOS BY NATIONALITY (DAYS)



TRIP MAIN PURPOSE

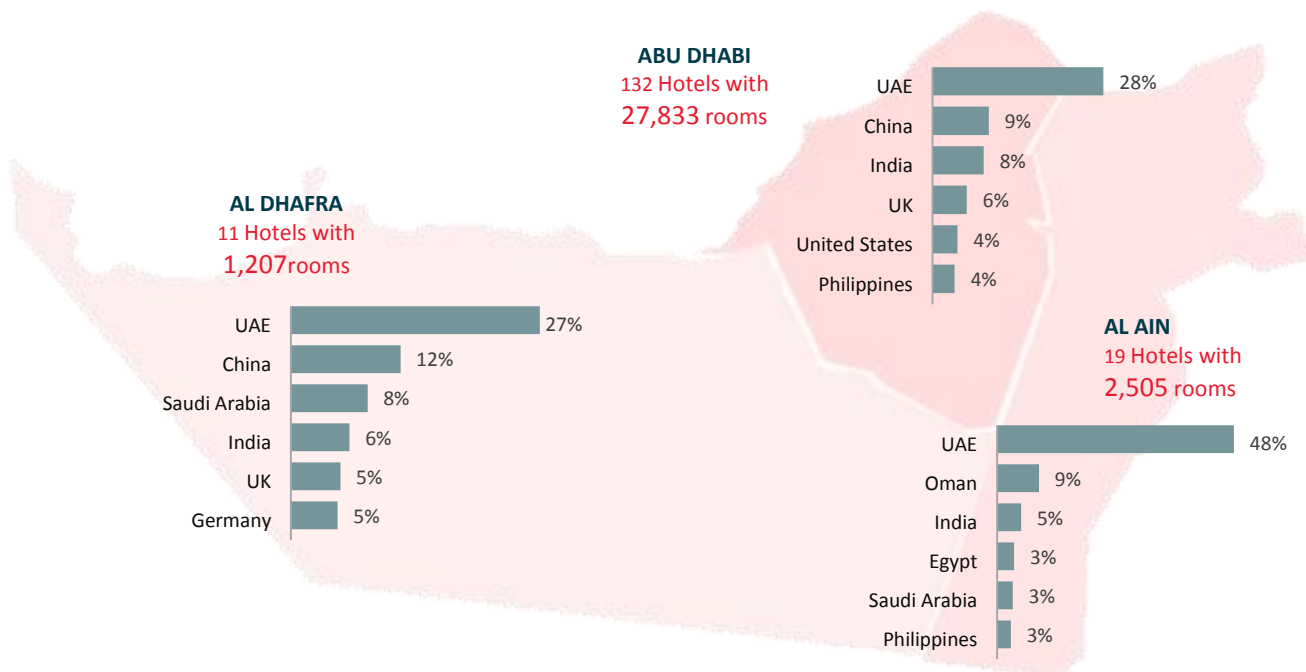
JULY 2018

YTD 2018



JULY 2018	ABU DHABI			AI AIN			AI DHAFRA		
	Actual	% Change vs Previous Year		Actual	% Change vs Previous Year		Actual	% Change vs Previous Year	
GUESTS	369,968	4.4%	▲	41,671	4.6%	▲	9,636	28.2%	▲
OCCUPANCY RATE	66%	4.3%	▲	60%	7.9%	▲	36%	9.3%	▲
ALOS DAYS	2.4	0.8%	▲	1.8	0.7%	▲	2.1	-1.6%	▼
REVENUES (M AED)	306.7	4.5%	▲	23.0	-7.2%	▼	8.8	-2.4%	▼
ARR (AED)	276	-0.7%	▼	261	-6.9%	▼	331	-21.8%	▼
REVPAR (AED)	182	3.6%	▲	157	0.4%	▲	120	-14.5%	▼

SUPPLY AND TOP NATIONALITIES - YTD 2018



YTD (JAN- JUL) 2018	ABU DHABI			AI AIN			AI DHAFRA		
	Actual	% Change vs Previous YTD		Actual	% Change vs Previous YTD		Actual	% Change vs Previous YTD	
GUESTS	2,503,982	5.2%	▲	248,662	2.0%	▲	81,861	11.3%	▲
OCCUPANCY RATE	73%	3.2%	▲	56%	-3.4%	▼	43%	-10.8%	▼
ALOS DAYS	2.7	2.9%	▲	2.0	0.5%	▲	2.1	-13.2%	▼
REVENUES (M AED)	2,701.2	-3.2%	▼	166.3	-11.8%	▼	120.6	-1.1%	▼
ARR (AED)	329	-6.4%	▼	284	-13.1%	▼	608	7.6%	▲
REVPAR (AED)	240	-3.4%	▼	160	-16.0%	▼	263	-4.1%	▼



46 HOTELS
13,112 ROOMS



38 HOTELS
8,182 ROOMS



33 HOTELS
4,583 ROOMS

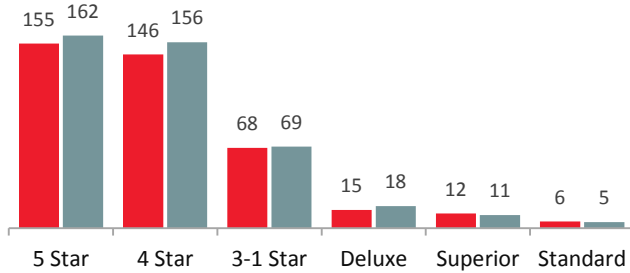
DELUXE
19 HOTELS
3,327 ROOMS

SUPERIOR
15 HOTELS
1,725 ROOMS

STANDARD
11 HOTELS
616 ROOMS

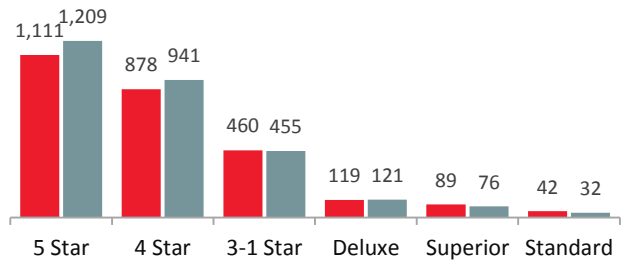
HOTEL GUESTS (000)

JULY 2017 JULY 2018

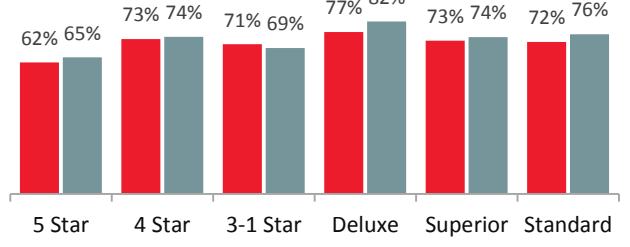
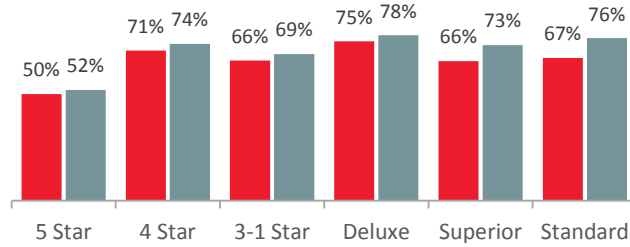


HOTEL GUESTS (000)

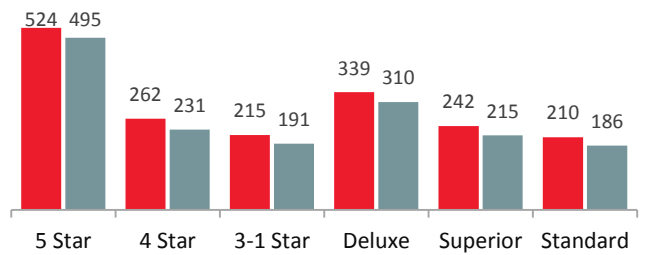
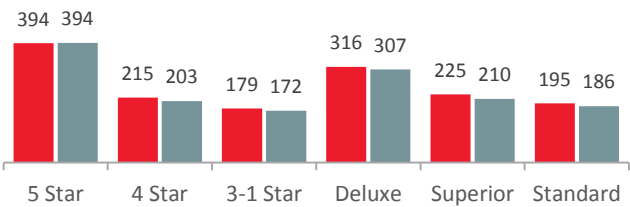
YTD 2017 YTD 2018



OCCUPANCY RATE (%)

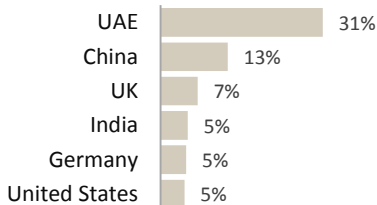


ARR (AED)

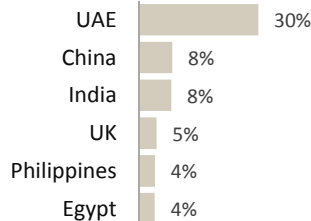


TOP NATIONALITIES YTD - 2018

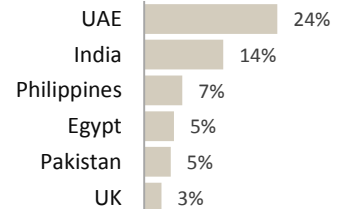
5 Star



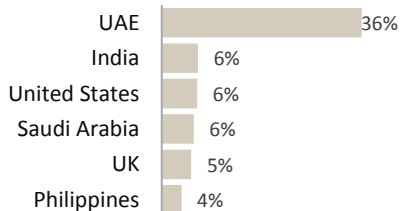
4 Star



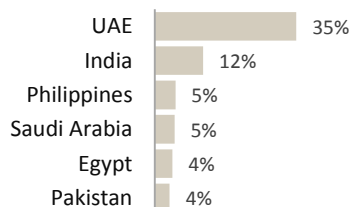
3-1 Star



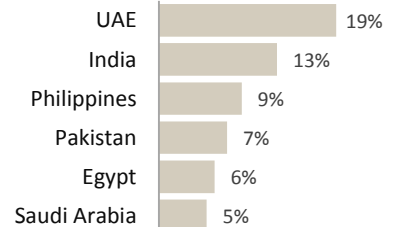
Deluxe



Superior



Standard



JULY 2018

UPCOMING EVENTS



AUGUST 2018



Nickelodeon Expo

Aug 06 - Aug 15, 2018

Marina Mall, Abu Dhabi

TICKETED FAMILY



SPARKLES OF INDIA

Aug 16 - Aug 18, 2018

du Forum, Abu Dhabi

TICKETED FAMILY



Teenage Mutant Ninja Turtles Live in Action

Aug 17 - Aug 23, 2018

Dalma Mall, Abu Dhabi

FREE FAMILY



Yas Gaming Festival

Aug 22 - Sep 01, 2018

Yas Mall, Yas Island, Abu Dhabi

FREE FAMILY



Eid Al Adha Celebrations at Yas Marina

Aug 21 - Aug 23, 2018

Yas Marina, Yas Island, Abu Dhabi

FREE FAMILY



Count Dracula & His Monsters at Bawabat Al Sharq Mall

Aug 22 - Aug 24, 2018

Bawabat al Sharq Mall, Abu Dhabi

FREE FAMILY

SEPTEMBER 2018



The Abu Dhabi International Hunting & Equestrian Exhibition

Sep 25 - Sep 29, 2018

ADNEC, Abu Dhabi

TICKETED CULTURE

For detailed list of events please check <https://abudhabievents.ae/en/Pages/default.aspx>

Abu Dhabi Summer Season: In response to popular demand, the Abu Dhabi Summer Season (ADSS) has been now extended until August 31. UAE residents and visitors will continue to enjoy unbeatable deals and promotions in addition to a host of activities and performances across the Emirate. Visitors and residents also have the chance to try their hand and win a host of exciting prizes and deals as they ‘Unbox the Amazing’ at participating malls.



Abu Dhabi Explores Future Collaborations with Saudi Tourism Sector: In collaboration with Etihad Airways and the Aviation Sector Development Committee (ASDC), the Department of Culture and Tourism – Abu Dhabi (DCT Abu Dhabi) successfully hosted a delegation of 11 key stakeholders and senior travel experts from the Kingdom of Saudi Arabia. The high-level trade meeting focussed on ways to leverage opportunities and address challenges as Abu Dhabi aims to attract 5.5 million visitors by end of 2018, of which Saudis make up a significant number.

DCT Abu Dhabi Attends Executive Summit at Google HQ: A delegation led by DCT Abu Dhabi attended an exclusive executive summit recently held at the Google headquarters in Mountain View, California, USA. The event offered DCT Abu Dhabi and its partners, Etihad Airways, Miral, ADNEC, and Aldar, the opportunity to explore Google’s main campus as well as give exclusive insight into the tech giant’s work culture, technology, and innovations.



DCT Abu Dhabi leads trade meeting with Australian delegation: During the first week of July, DCT Abu Dhabi and Etihad Airways organised a promotional tour that raised the bar for trade events in Australia. This has been effectively done by offering ‘gold leaf-infused’ welcome drinks, a spectacular chocolate model of the Sheikh Zayed Grand Mosque and unique interactive ways to learn about the capital of the UAE as a potential destination. The ‘Discover Abu Dhabi’ Roadshow included events in major Australian cities namely, Brisbane, Melbourne and Sydney.



DCT Abu Dhabi Wins PATA Accolade for Best Destination Campaign: DCT Abu Dhabi has been awarded a top honour at the annual Pacific Asia Travel Association Awards for its destination brand campaign. The winners of the 2018 PATA Grand and Gold Awards were announced by organisers, with DCT Abu Dhabi triumphing in the Gold category after an independent judging committee consisting of fourteen senior executives from the travel, tourism and hospitality sectors recognised the ‘Your Extraordinary Story’ campaign as a winner in the “Marketing – Secondary Government Destination”.

Sessions were organised around the unique working culture at Google, digital brand building and various Google travel products, as well as trends that are shaping the industry. Google also organised an exclusive presentation by Visit California, as a way of sharing experiences among tourism boards, with particular emphasis on organisational structure, objectives and marketing strategy.



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.