

HOTEL REPORT

APRIL 2018





Dear Friends,

We enter the second quarter of 2018 with April data for hotel performance that presents a slightly varied picture.

For this past month, we can report a slight decrease in the number of Abu Dhabi hotel guests compared with the same period in 2017, a decline of 2.1%. In total, 435,430 hotel guests stayed in the emirate's 162 hotels and hotel apartments, a drop of 9,500 on the year.

That said, the cumulative picture for the first four months of the year shows guest growth of 7.3%, maintaining our early progress towards a record-setting 2018 on this central metric.

The latest arrival figures also show a mixed performance picture by key source market; growth from China, the US and India, offset by lower totals from the UK and Germany, amongst others.

Looking at the detail of this, both the US and India posted double digit growth for the month (16.2% and 15.9% respectively), while China also chipped in with a healthy 9.6% gain for April. We are continuing to see reward from our focus on the Chinese market with multiple roadshows and trade show appearances; the country continues to be our No.1 international visitor market.

Numbers were slightly less robust versus a year ago for the UK (-11.2%) and Germany (-7.7%). However, on the aforementioned Year to Date measure, all five key markets are performing well in; China is up by 25.8%, India by 26.8%, the US by 22.2%, Germany by 16.9% and the UK by 13.7%.

Looking at the regional picture, the data reflects overall performance; hotel guest numbers were under some pressure; Abu Dhabi City down 2%, Al Ain 1.4% and Al Dhafra 8.1%. Again, the position for 2018 to-date is still very positive, with Abu Dhabi up 7.6%, Al Ain up 3.2% and Al Dhafra up 11.7%.

Beyond that, importantly, we have seen positive movement on Average Length of Stay. All three regions have posted positive results, with Abu Dhabi up 7.3%, Al Ain up 8.8% and Al Dhafra up 9%. These numbers are a pleasing reversal on recent months.

We continue to face pressure on other important measures, most notably Total Hotel Revenues, Average Room Rate and Revenue per Available Room. Summing it up, the April performance against these metrics is behind where it was a year ago, for all regions. We are on record as describing this as an ongoing issue and a shared responsibility to be addressed.

As we head further into Q2, our collective emphasis is clear, to maintain steady year-to-date increases as we look to reach shared 2018 targets. We must work as one towards this goal.

Yours sincerely,

Saif Saeed Ghobash
Undersecretary, Department of Culture & Tourism

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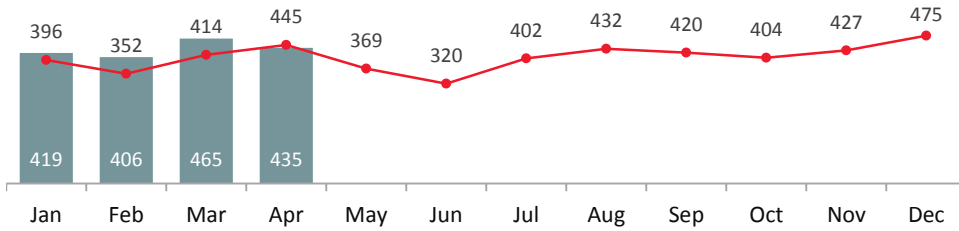
APRIL 2018

OVERALL PERFORMANCE

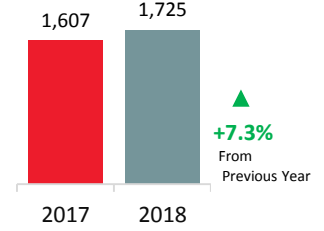
2017 2018

162 Hotels with 31,236 rooms

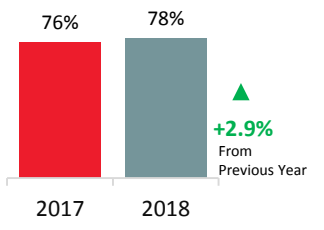
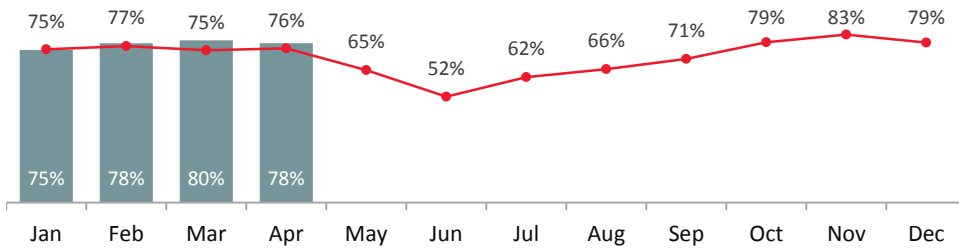
HOTEL GUESTS (000)



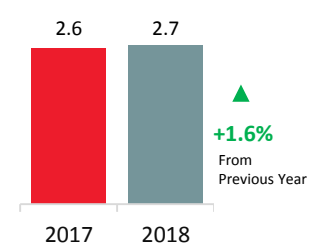
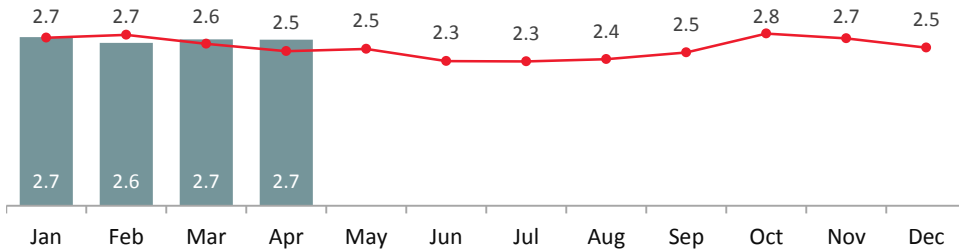
YTD (JAN- APR)



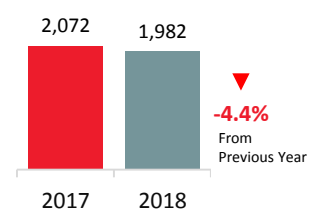
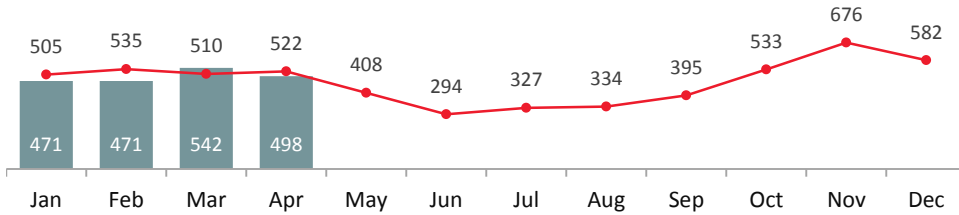
OCCUPANCY RATE



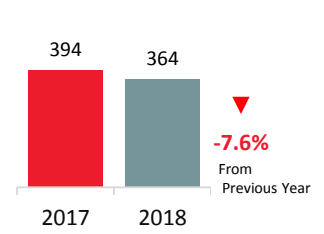
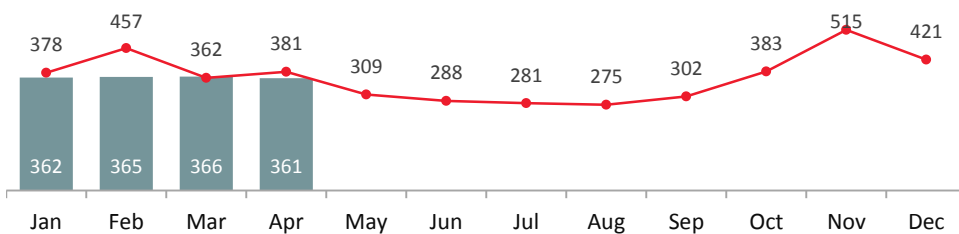
AVERAGE LENGTH OF STAY (ALOS-DAYS)



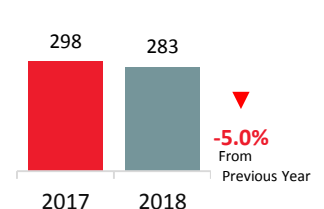
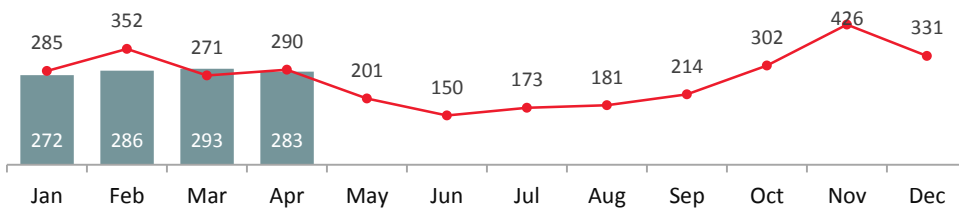
HOTEL TOTAL REVENUE (MILLION UAE)



AVERAGE ROOM RATE (UAE)



REVENUE PER AVAILABLE ROOM (UAE)



APRIL 2018 HOTEL GUESTS

435,430

HOTEL GUESTS

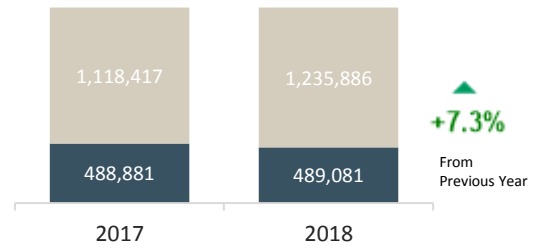
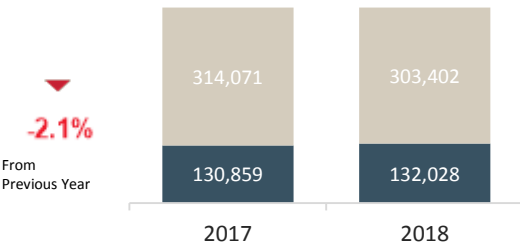
■ UAE ■ Non UAE

APRIL 2018

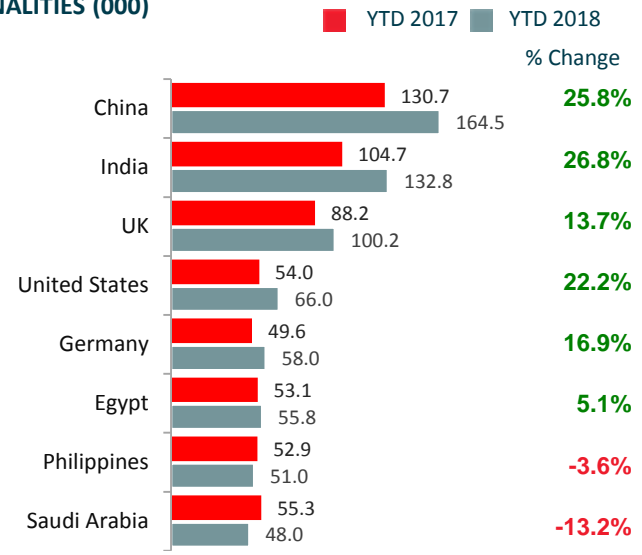
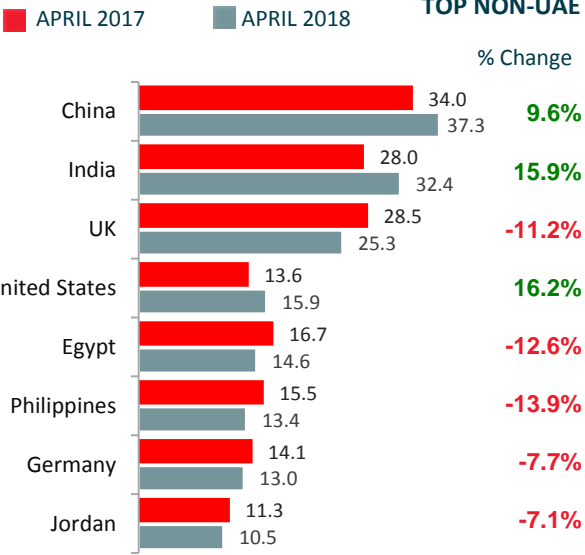
YTD (JAN- APR)
2018

1,724,967

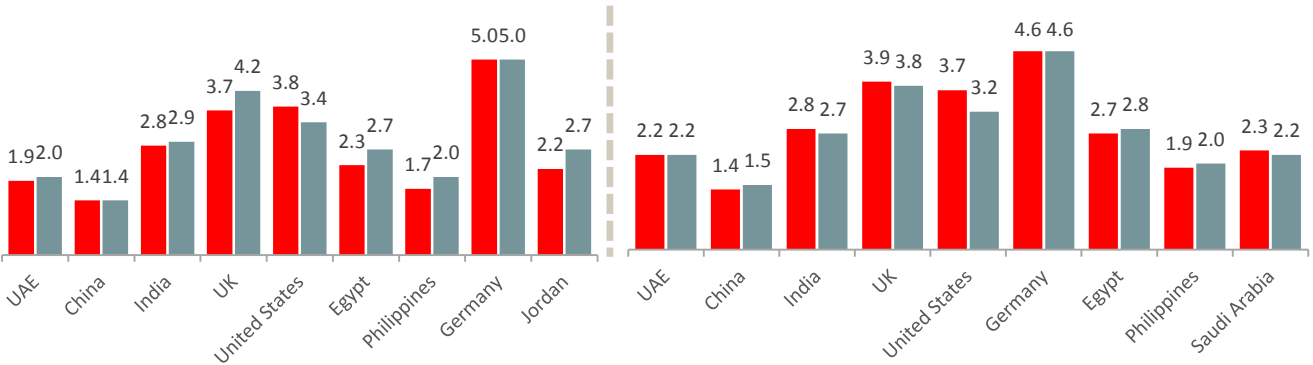
HOTEL GUESTS



TOP NON-UAE NATIONALITIES (000)



ALOS BY NATIONALITY (DAYS)

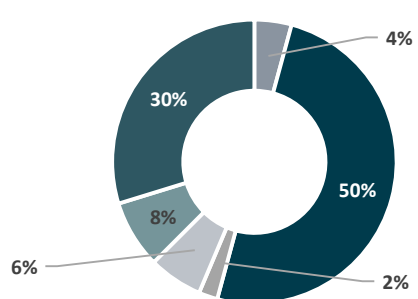
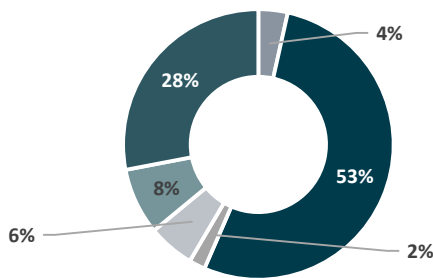


TRIP MAIN PURPOSE

■ Vacations ■ Business ■ Mice ■ VFR ■ Shopping ■ Others

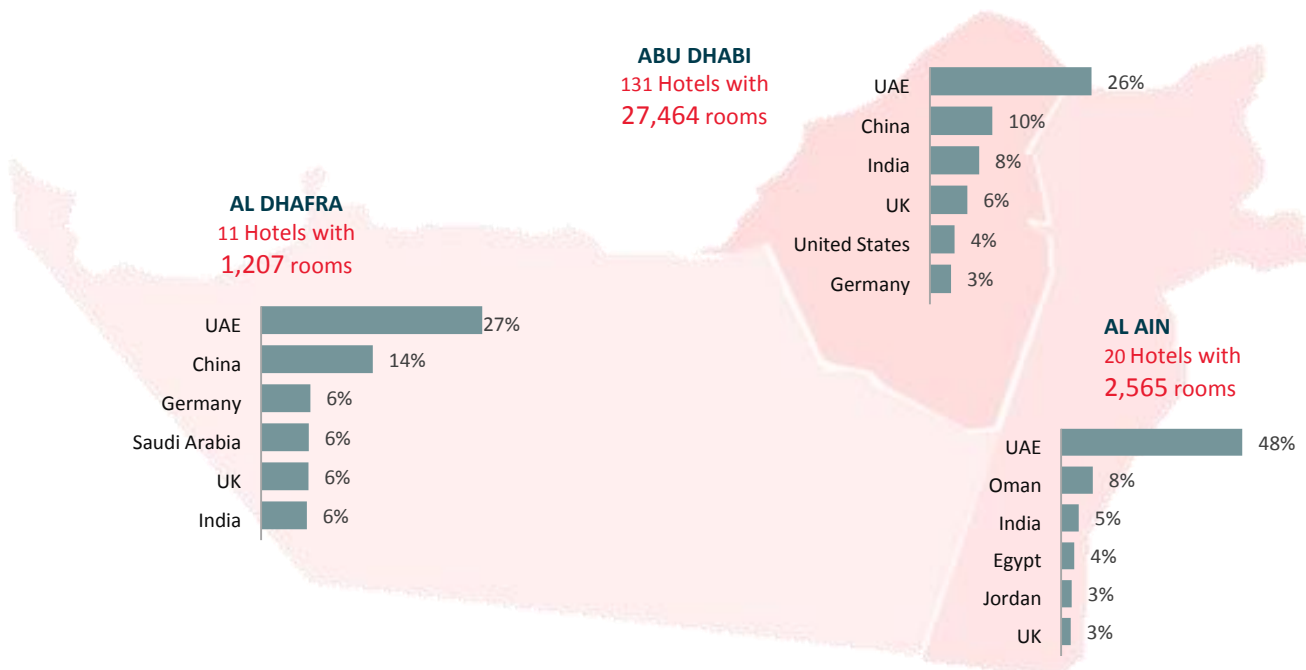
APRIL 2018

YTD 2018



APRIL 2018	ABU DHABI			AI AIN			AI DHAFRA		
	Actual	% Change vs Previous Year		Actual	% Change vs Previous Year		Actual	% Change vs Previous Year	
GUESTS	383,324	-2.0%	▼	38,550	-1.4%	▼	13,556	-8.1%	▼
OCCUPANCY RATE	81%	3.5%	▲	59%	-0.8%	▼	52%	3.6%	▲
ALOS DAYS	2.8	7.3%	▲	1.9	8.8%	▲	2.3	9.0%	▲
REVENUES (M AED)	450.4	-3.5%	▼	24.9	-18.3%	▼	22.3	-11.3%	▼
ARR (AED)	357	-4.1%	▼	288	-17.2%	▼	657	-16.6%	▼
REVPAR (AED)	290	-0.7%	▼	170	-17.9%	▼	341	-13.6%	▼

SUPPLY AND TOP NATIONALITIES - YTD 2018



YTD (JAN- APR) 2018	ABU DHABI			AI AIN			AI DHAFRA		
	Actual	% Change vs Previous YTD		Actual	% Change vs Previous YTD		Actual	% Change vs Previous YTD	
GUESTS	1,521,038	7.6%	▲	149,371	3.2%	▲	54,558	11.7%	▲
OCCUPANCY RATE	81%	4.5%	▲	60%	-7.3%	▼	50%	-18.3%	▼
ALOS DAYS	2.8	2.2%	▲	2.0	2.8%	▲	2.1	-20.0%	▼
REVENUES (M AED)	1,787.2	-4.1%	▼	104.3	-11.9%	▼	90.8	-0.3%	▼
ARR (AED)	359	-8.0%	▼	296	-15.6%	▼	726	22.8%	▲
REVPAR (AED)	290	-3.9%	▼	179	-21.7%	▼	364	0.4%	▲



45 HOTELS
12,744 ROOMS



38 HOTELS
8,182 ROOMS



33 HOTELS
4,583 ROOMS

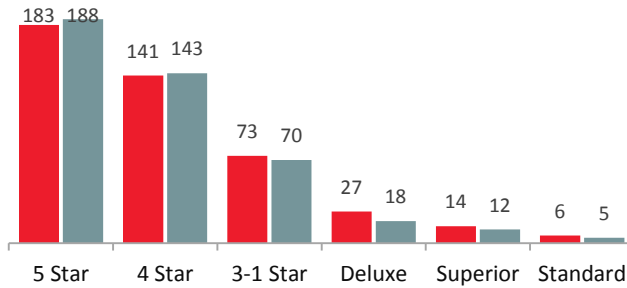
DELUXE
19 HOTELS
3,327 ROOMS

SUPERIOR
15 HOTELS
1,725 ROOMS

STANDARD
12 HOTELS
675 ROOMS

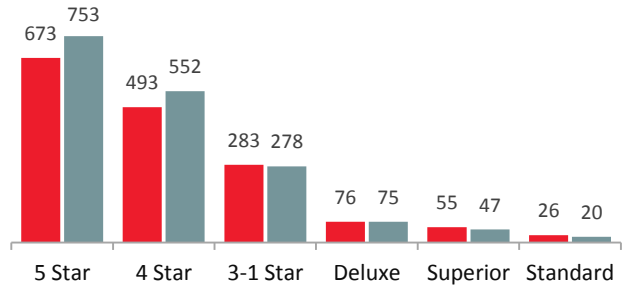
HOTEL GUESTS (000)

■ APRIL 2017 ■ APRIL 2018

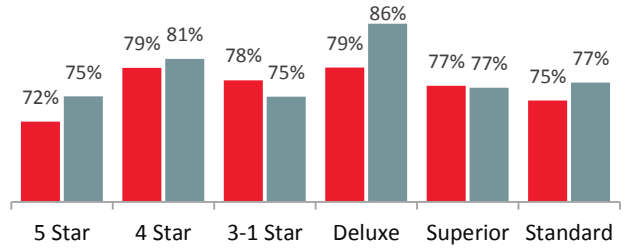
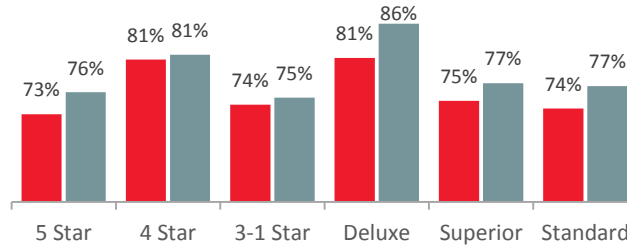


HOTEL GUESTS (000)

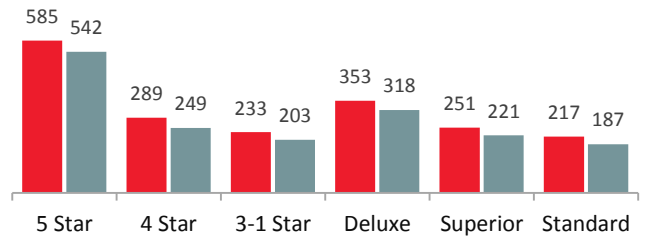
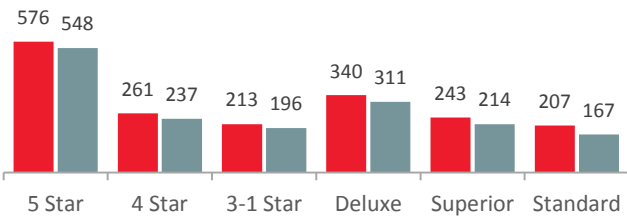
■ YTD 2017 ■ YTD 2018



OCCUPANCY RATE (%)

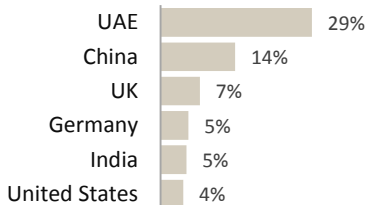


ARR (AED)

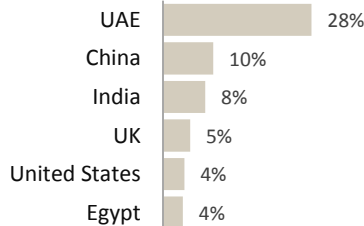


TOP NATIONALITIES YTD - 2018

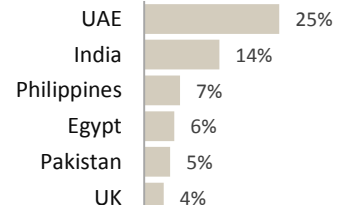
5 Star



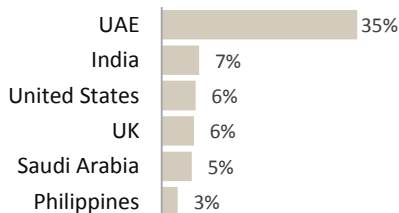
4 Star



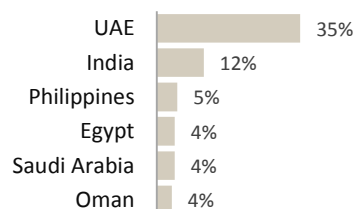
3-1 Star



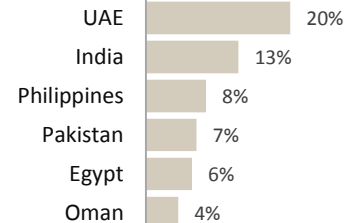
Deluxe



Superior



Standard



APRIL 2018 UPCOMING EVENTS



May 2018



Zayed: Story of a Nation

May 14 - Jun 09, 2018

Manarat Al Saadiyat, Abu Dhabi

FREE EDUCATION



Year of Zayed Photographic Exhibition

May 15 - Jun 17, 2018

The Galleria, Abu Dhabi

FREE ARTS



The Month of Blessings

May 15 - Jun 13, 2018

Bawabat al Sharq Mall, Abu Dhabi

FREE FAMILY



Lines and Stitches

Mar 15 - Jun 14, 2018

Al Qattara Arts Centre, Al Ain

FREE ARTS



13th Ramdhan Festival

May 20 - Jun 04, 2018

Abu Dhabi National Theatre, Abu Dhabi

FREE FAMILY



Ramadan Caravan at Al Seef Mall

May 24 - May 25, 2018

The Walk at Al Seef Resort and Spa by Andalus, Abu Dhabi

FREE FAMILY

June 2018



100 Challenge Day

Feb 18 - Sep 09, 2018

Family Development Foundation HQ, Abu Dhabi

FREE SPORTS



Permanent Temporariness

Feb 24 - Jun 09, 2018

NYU Abu Dhabi Art Gallery, Abu Dhabi

FREE ARTS

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

Sheikh Zayed Book Award: Under the patronage of HH Sheikh Mohammed bin Zayed Al Nahyan, Crown Prince of Abu Dhabi and Deputy Supreme Commander of the UAE Armed Forces, the Sheikh Zayed Book Award held the award ceremony for its 12th edition (2017/18) yesterday at Manarat Al Saadiyat in Abu Dhabi, where the Arab World Institute was named the ‘Cultural Personality of the Year’. This year’s edition of the Sheikh Zayed Book Award awarded prizes for eight of its nine categories, after no winner was declared for the ‘Contribution to the Development of Nations’ category.



Culture Summit 2018: The annual international convening, CultureSummit Abu Dhabi 2018, came to a close this month following final panel discussions examining themes, concepts, and action points arising throughout the event. Under the theme “Celebrating the Fruits of Unexpected Collaborations”, the discussions summarised those ideas and initiatives from the summit that will be taken forward to concretely address, through the power of culture, some of the world’s most pressing global challenges.



Abu Dhabi International Book Fair: The 28th edition of the Abu Dhabi International Book Fair took place at Abu Dhabi National Exhibition Centre from April 25th until May 1. Highlights include the 6th edition of the Abu Dhabi International Translation Conference under the slogan ‘Scientific Translation and Knowledge Development’; the Professional Programme, which includes presentations covering the various aspects of publishing, translation, and children’s literature and illustration; the Cultural Programme, which includes a selection of talks celebrating the legacy of the late Sheikh Zayed bin Sultan Al Nahyan and the Show Kitchen, where the focus will be on the Country of Honour Poland.

Arabian Travel Market: The participation of DCT Abu Dhabi at Arabian Travel Market (ATM) 2018 concluded this month after four successful days showcasing distinct business growth, increased tourist arrivals and significant new partnership deals. Leading a large delegation to ATM, DCT Abu Dhabi was joined by 77 stakeholders representing more than 90 products in order to build further momentum behind increased guest arrival numbers. Abu Dhabi’s tourism sector is enjoying steady growth as the emirate continues to position itself as an attractive destination for visitors and investors alike. This year, DCT Abu Dhabi achieved record first quarter hotel traffic amounting to a 10.9% rise over the corresponding period of 2017. This growth was driven by a surge of visitors from the UK, Germany, India, China, United States and the GCC region.





Occupancy Rate, %

Occupancy is the percentage of available rooms that are occupied, calculated by dividing the number of occupied rooms by the available rooms.



Available rooms

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 daily, including complimentary and house use



Average Length
of Stay
ALOS

Average number of nights guests spent in a single stay, calculated by dividing guest nights by guest arrivals



Guest arrivals

Number of registered guest arrivals (check-ins) 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



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.
(Note: Based on paid rooms only, excluding complimentary and house use but service charge)



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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