

HOTEL REPORT

NOVEMBER-2017



Dear Hotel Partner,

As part of our commitment to sharing with you the latest data available regarding the hospitality sector in Abu Dhabi, I am pleased to disclose details of November's Hotel Establishments' Performance Report.

The month saw impressive double digit growth with a 16% rise in visitors staying in the emirate's 162 hotels and hotel apartments compared to the same month last year to reach 443,636 guests.

Our cumulative total for the first 11 months of the year is now 4,384,652, representing a year-on-year increase of 9%.

The number of guests increased across all three regions in November with Abu Dhabi city recording a 16.8 per cent rise at its 131 hotels, Al Ain Region increasing by 10.7% across its 20 hotels and Al Dhafra Region increasing by 15.3% at its 11 hotels.

While November and Q4 is traditionally a strong period for us, particularly with visitors from Europe, we are still highly encouraged by these results and expect a strong close to the year.

The opening of Louvre Abu Dhabi on November 11 was a monumental event, not only for Abu Dhabi, but also for the whole of the country and the region, contributing enormously to the emirate's appeal as a place to visit. Our French visitors increased by 32% in November and we expect further positive traction from the France and European markets next year.

I am sure the Formula 1 Etihad Airways Abu Dhabi Grand Prix, Abu Dhabi Art and the Fourth National Traditional Handicrafts Festival also all contributed positively to occupancy levels during November.

China remains Abu Dhabi's largest overseas source market with 334,000 Chinese guests staying in the emirate this year, a rise of 63%, which can be attributed to the lifting of visa restrictions, destination marketing campaigns in major Chinese cities throughout the year and your help in tailoring your services to their requirements.

India is the second largest supplier of international guests, rising almost 10% this year to number 320,000 while the UK is Europe's largest source market, recording 12% growth to number 244,000. The US and Saudi Arabian markets have also shown increases.

This month's UAE guest arrivals total of 121,130 was a 14% rise on November 2016 and as we expand our annual calendar of events, we expect further uplift from this vital market.

We have challenges to address, such as increasing average length of stay of our guests and the occupancy rate, but we are constantly working on new initiatives and marketing to improve these figures.

May I now take this opportunity to wish you all a very happy and prosperous New Year.
As ever, thank you for your continued support.

Yours sincerely,

Saif Saeed Ghobash

Director General, Department of Culture and Tourism

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NOVEMBER 2017

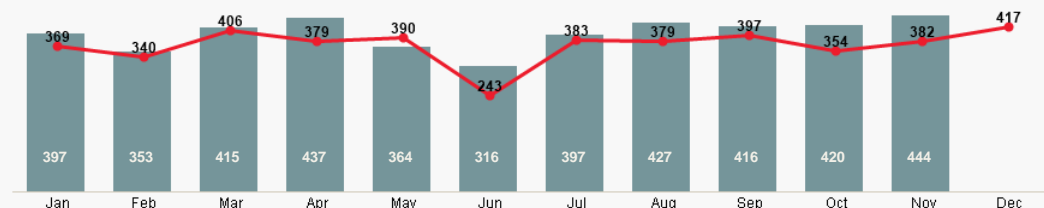
OVERALL PERFORMANCE



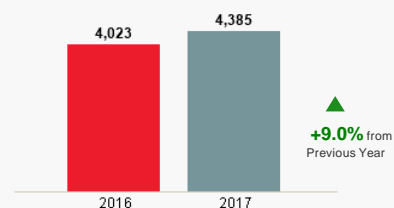
162 HOTELS WITH 30,574 ROOMS

■ 2016 ■ 2017

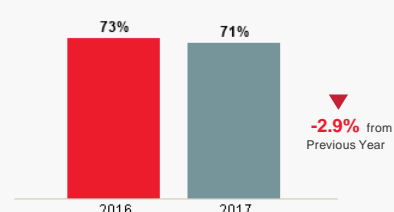
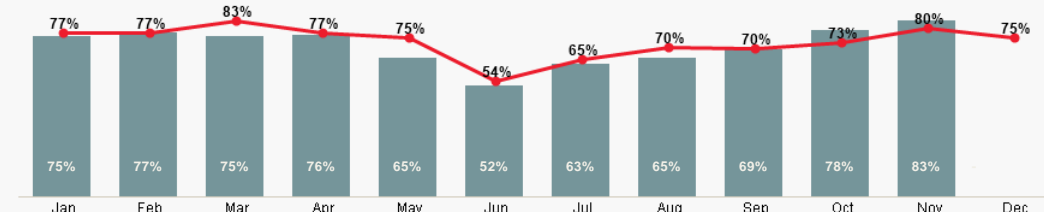
HOTEL GUESTS (000)



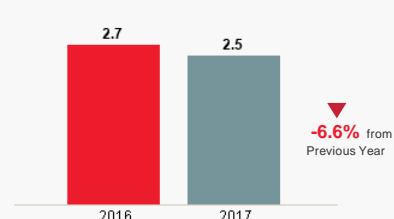
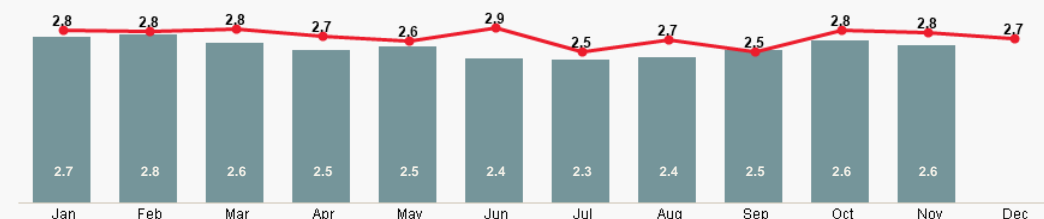
YTD (JAN- NOV)



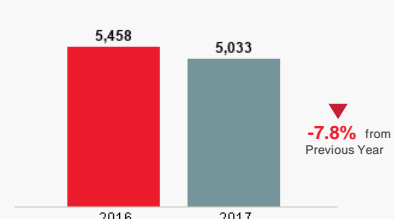
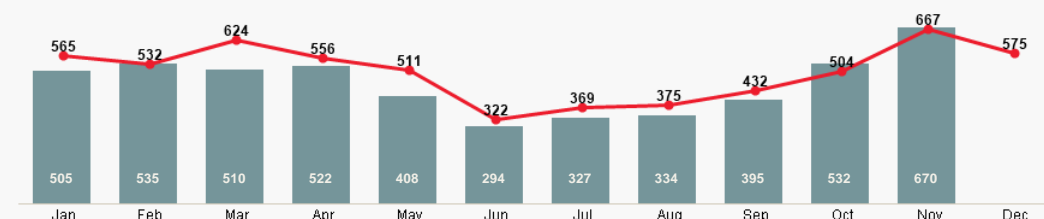
OCCUPANCY RATE



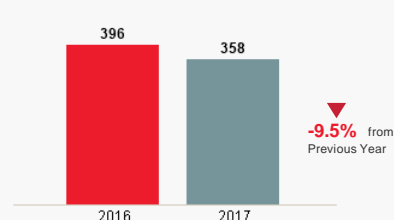
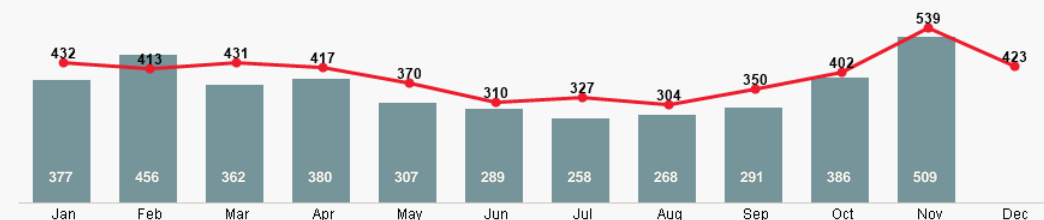
AVERAGE LENGTH OF STAY (ALOS-DAYS)



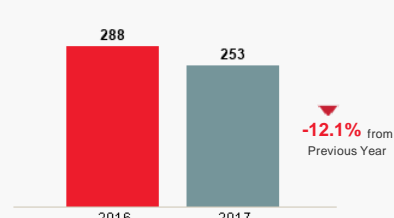
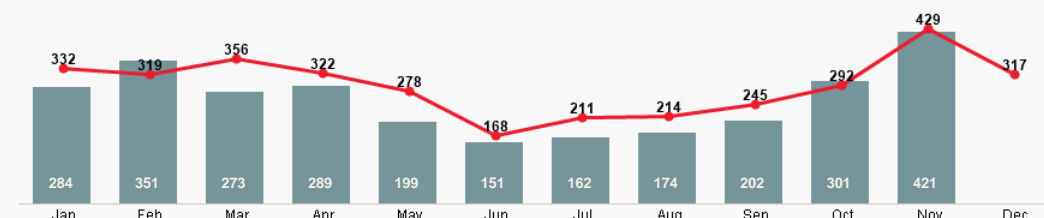
HOTEL TOTAL REVENUE (MILLION UAE)



AVERAGE ROOM RATE (UAE)



REVENUE PER AVAILABLE ROOM (UAE)

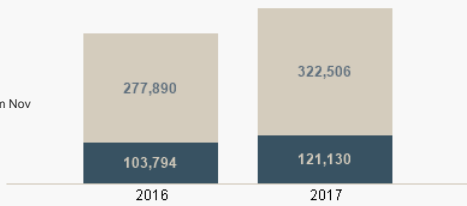




443,636
HOTEL GUESTS

■ Non UAE ■ UAE

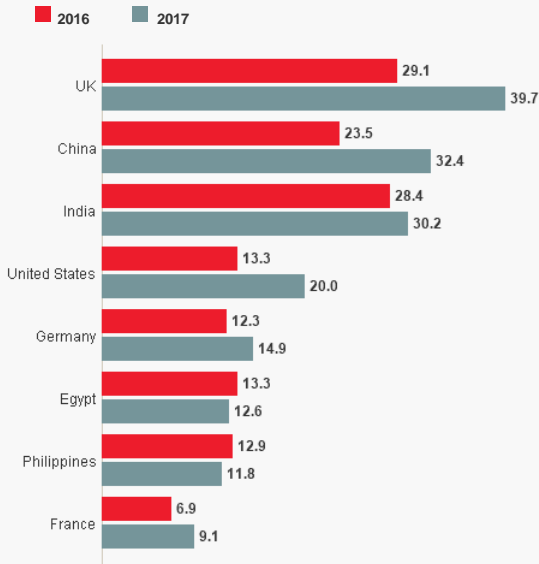
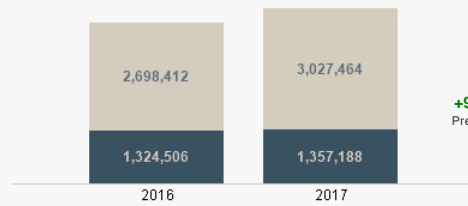
▲ **+16.2%** from Nov 2016



NOVEMBER 2017 YTD (JAN- NOV) 2017

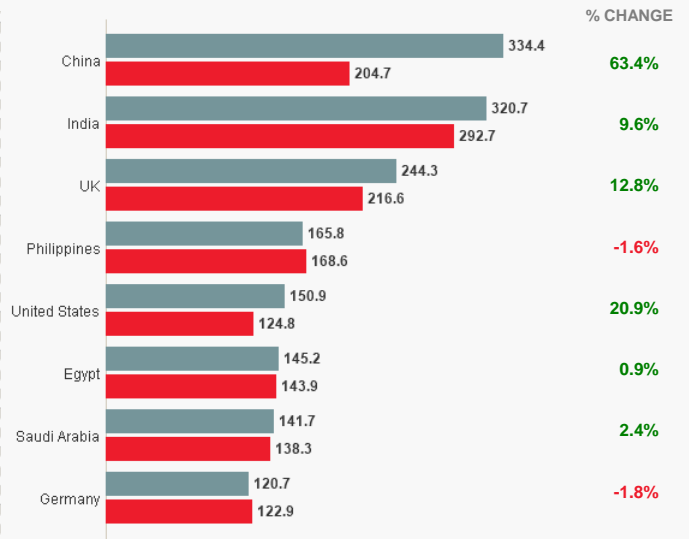
4,384,652
HOTEL GUESTS

▲ **+9.0%** from Previous Year

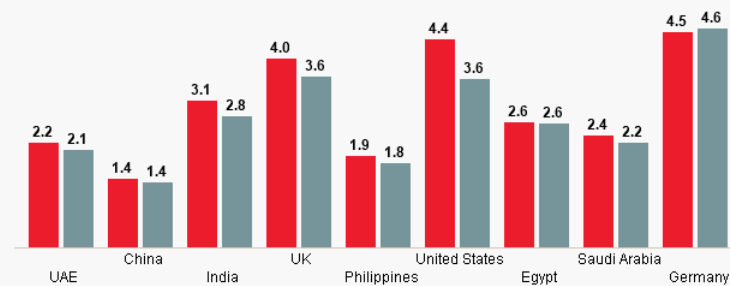
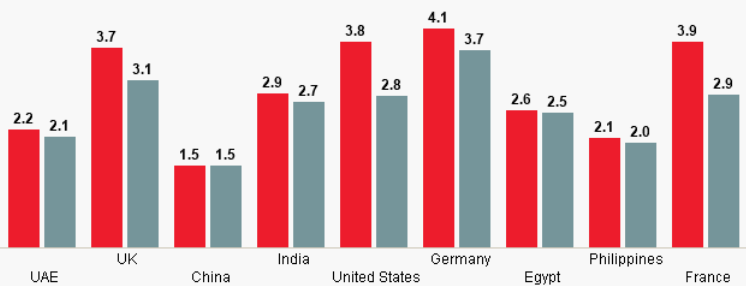


TOP NON-UAE NATIONALITIES (000)

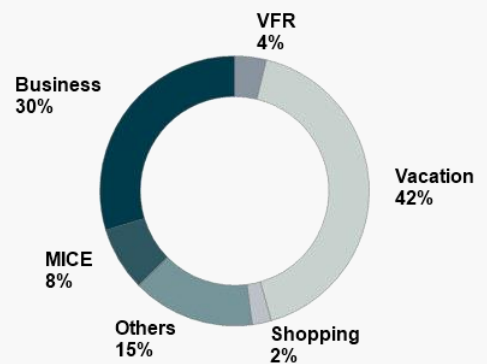
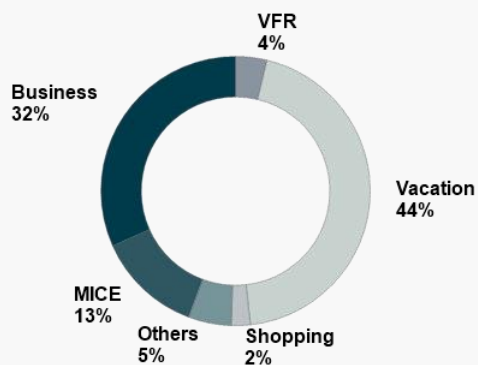
% CHANGE



ALOS BY NATIONALITY (DAYS)



TRIP MAIN PURPOSE



NOVEMBER 2017

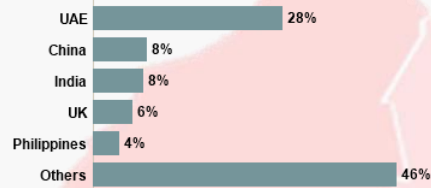
PERFORMANCE BY REGION

NOV 2017	ABU DHABI		AL AIN		AL DHAFRA	
	Actual	% Change Previous Year	Actual	% Change Previous Year	Actual	% Change Previous Year
GUESTS	393,378	16.8% ▲	38,262	10.7% ▲	11,996	15.3% ▲
OCCUPANCY RATE	86%	6.4% ▲	60%	-10.5% ▼	46%	-32.7% ▼
ALOS (DAYS)	2.7	-7.1% ▼	1.8	-6.8% ▼	2.1	-34.6% ▼
REVENUES (M AED)	622.1	1.9% ▲	26.0	-11.3% ▼	21.9	-18.2% ▼
ARR (AED)	516	-5.7% ▼	304	-13.1% ▼	798	23.2% ▲
REVPAR (AED)	446	0.3% ▲	182	-22.2% ▼	369	-17.1% ▼

SUPPLY AND TOP NATIONALITIES YTD (JAN- NOV)

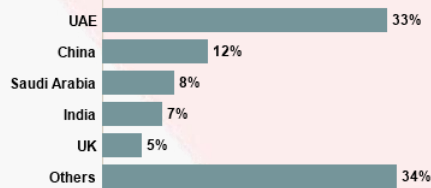
ABU DHABI

131 Hotels
with 26,821 rooms



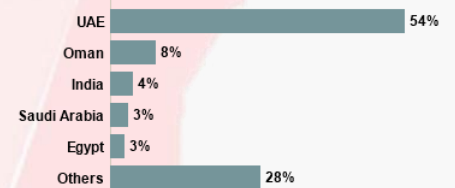
AL DHAFRA

11 Hotels
with 1,206 rooms



AL AIN

20 Hotels
with 2,547 rooms



YTD (JAN- NOV) 2017	ABU DHABI		AL AIN		AL DHAFRA	
	Actual	% Change Previous Year	Actual	% Change Previous Year	Actual	% Change Previous Year
GUESTS	3,865,961	9.5% ▲	402,985	5.1% ▲	115,706	7.0% ▲
OCCUPANCY RATE	73%	-0.9% ▼	58%	-11.3% ▼	45%	-33.5% ▼
ALOS (DAYS)	2.6	-6.3% ▼	1.9	-4.7% ▼	2.5	-23.3% ▼
REVENUES (M AED)	4,556.4	-6.0% ▼	292.2	-12.5% ▼	184.1	-33.1% ▼
ARR (AED)	356	-8.2% ▼	315	-15.5% ▼	551	-14.5% ▼
REVPAR (AED)	259	-9.0% ▼	184	-25.1% ▼	246	-43.2% ▼

NOVEMBER 2017

PERFORMANCE BY STAR RATING



5
45 HOTELS
12,538 ROOMS

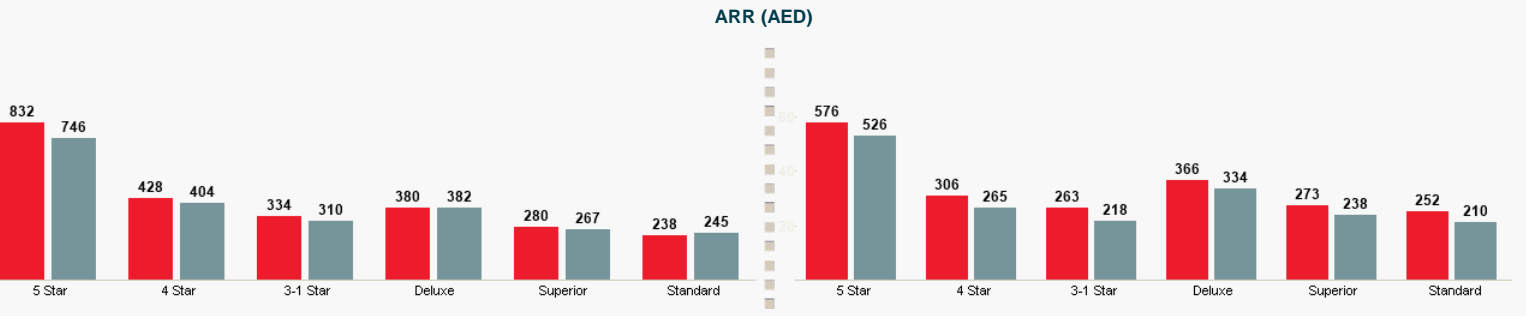
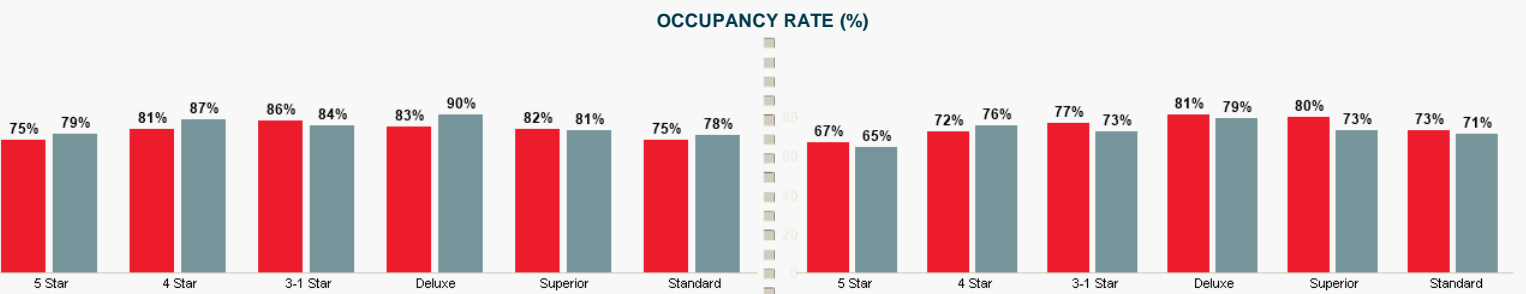
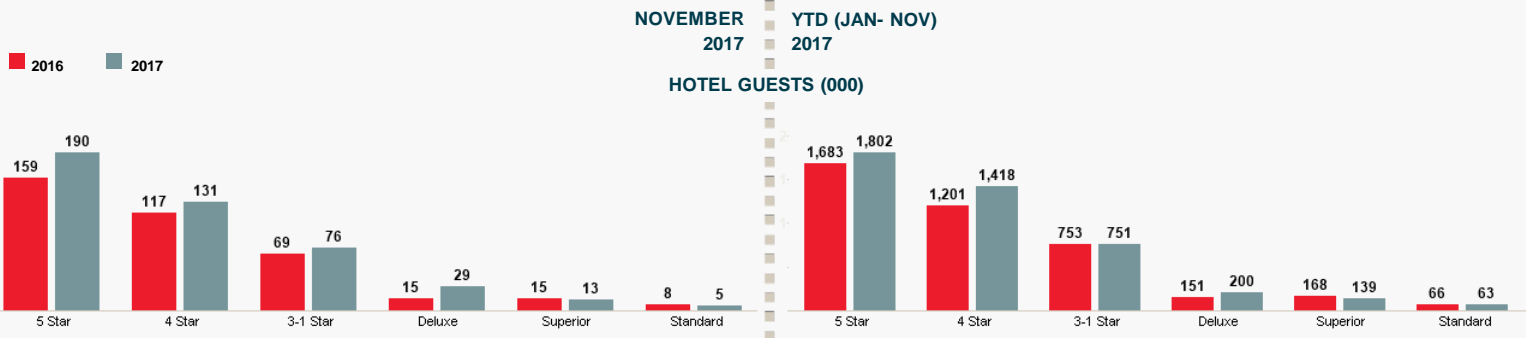
4
37 HOTELS
7,593 ROOMS

3-1
33 HOTELS
4,720 ROOMS

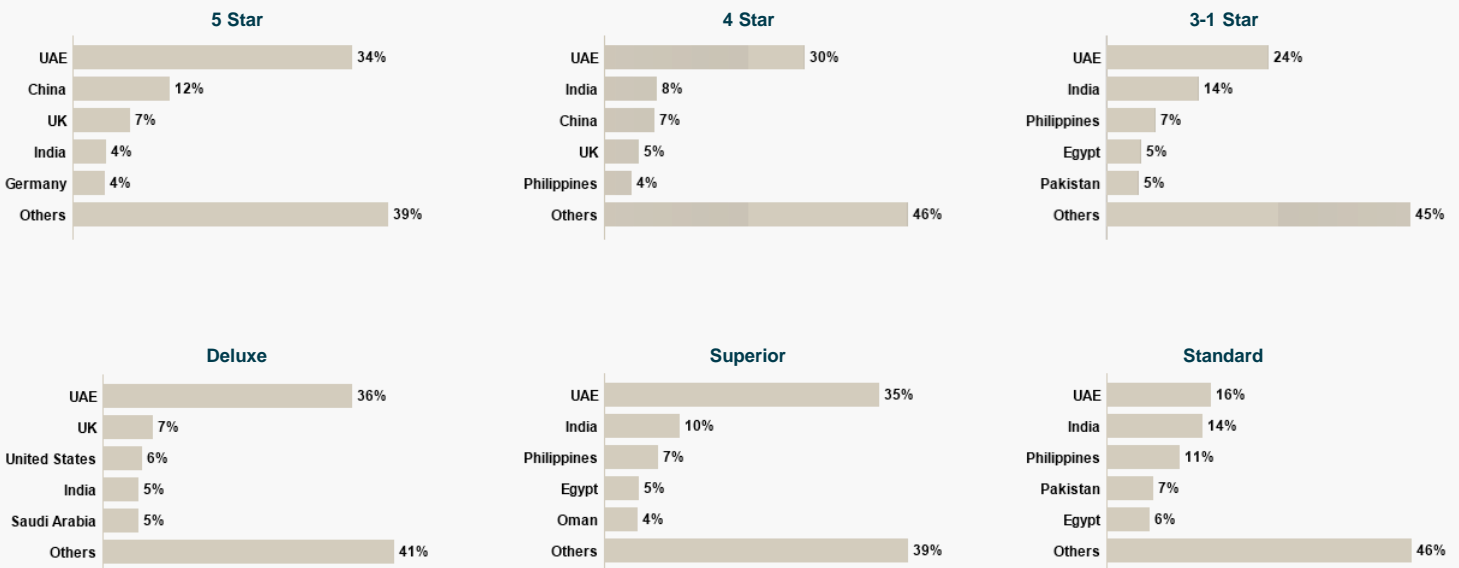
DELUXE
19 HOTELS
3,216 ROOMS

SUPERIOR
16 HOTELS
1,796 ROOMS

STANDARD
12 HOTELS
711 ROOMS



TOP NATIONALITIES YTD (JAN-NOV)



NOVEMBER 2017


UPCOMING EVENTS



JAN 2018

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY		
	1	2	3	4	5	6		
7	8	9	10	11	Abu Dhabi Grand Slam World Jiu Jitsu Tour (Jan 12 & 13)  Abu Dhabi	Abu Dhabi Grand Slam World Jiu Jitsu Tour Abu Dhabi Sustainability Week (Jan 13 to Jan 20)  Abu Dhabi		
14	Zayed Future Energy Prize Awards Ceremony  Abu Dhabi	15	16	17	18	Terry Fox Run  Abu Dhabi	Abu Dhabi Sustainability Week (Day 7)  Abu Dhabi	
Sultan Bin Zayed Heritage Festival 2018 (Jan 21 to Feb 3)  Sweihan City	21	22	23	24	25	Cario Sound Music Festival  Abu Dhabi	26	27
28	29	30	31					

FEB 2018

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	
				1	2	Sultan Bin Zayed Heritage Festival 2018 (Jan 21 to Feb 3)  Sweihan City	
4	5	6	Aakash Odedra - #JeSuis (Feb 7 to Feb 9)  Abu Dhabi	7	8	9	10
11	12	13	14	Kronos Quartet - Residency (Feb 15 to Feb 16)  Abu Dhabi	15	16	17
18	19	20	21	Kronos Quartet  Abu Dhabi	22	23	24
25	26	27	28				



Louvre Abu Dhabi: The Louvre Abu Dhabi was opened for the first time to the public on 11th November by dignitaries from the UAE and France, with both parties hailing the museum as a monument to the global confluence of cultures that will broadcast tolerance and acceptance. The museum is a product of a 2007 agreement between the UAE and French governments. The deal lends the name of the renowned Louvre Museum for 30 years and six months, along with temporary exhibitions for 15 years, and artworks from 13 leading French institutions for a decade. The museum currently has more than 600 artworks and artefacts on display in its 23 galleries, and 12 "chapters".



Abu Dhabi Art : Held under the patronage of His Highness Sheikh Mohammed bin Zayed Al Nahyan, Crown Prince of Abu Dhabi and Deputy Supreme Commander of the UAE Armed Forces, and opened by His Highness Sheikh Hazza bin Zayed Al Nahyan, Vice Chairman of the Abu Dhabi Executive Council, the ninth edition of Abu Dhabi Art concluded on Saturday 11th November. Bringing together 47 galleries from 18 different countries, the 2017 edition of the fair confirmed the international reputation of Abu Dhabi Art and its packed programme.



Games Con Held: The largest gaming event in the region, Middle East Games Con was held for three days from 23 – 25 November at the Abu Dhabi National Exhibition Centre. The event featured exhibitors from around the globe and gave gamers the opportunity to look at new product launches and participate in tournaments and experience new games. Middle East Games Con is one of the first strategic partnerships between the Department's events incentive fund, Advantage Events Abu Dhabi, and the private sector to incentivise companies to enhance the events programme.



Visitor Figures: Abu Dhabi has accelerated its growth in guest arrivals during October with 418,883 guests checking into the emirate's 163 hotels and hotel apartments, representing an 18 per cent increase over the same month last year. The cumulative number of guest arrivals for the first ten months of 2017 has increased to reach over 3.9 million, representing growth of 8% on the year and keeping the emirate on track to surpass last year's record total of 4.4 million. October's double-digit percentage growth in visitors from China (88%) to number 32,000, underpinned by the lifting of visa restrictions, is still indicative of the benefits reaped from the Department's extensive marketing campaigns across that country.



Occupied rooms

Number of rooms used daily, including complimentary and house use



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..)



Occupancy rate, %

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



Guest nights

Number of night guests spent in the hotel regardless of the type of rooms they occupy



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



**Average Length of Stay
ALOS**

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



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