

HOTEL REPORT

DECEMBER-2017



Dear Hotel Partner,

As we head into another exciting year for the emirate, I would like to begin with a note of thanks to you – as a respected stakeholder allied to our continuing mission to make Abu Dhabi a more desirable and rewarding destination of distinction; with your continued support, our performance as a touristic proposition has remained buoyant and strong.

Ours is an extraordinary emirate, with a deeply unique heritage and a future which promises much more to come. Throughout a period of significant political and economic change around the world, the Department of Culture and Tourism – Abu Dhabi has been resolute in promoting the emirate to the world, with several new products launched in 2017 which boosted our already impressive portfolio further, including Louvre Abu Dhabi, the Dar Al Zain Festival, and the New Year's Countdown Village, to name a few.

In terms of the hospitality sector, 2017 was another record-breaking year for Abu Dhabi, as our annual report will show.

For the 12 month period, boosted by extremely strong December results, Abu Dhabi recorded a 9.8% increase in Hotel Guests compared to the previous year; the emirate welcomed 4,875,499 in 2017.

December – boosted as it was by three major events, including the aforementioned Dar Al Zain Festival, the New Year's Countdown Village, and the return of the ever-popular Abu Dhabi Food Festival – posted results which represented a 17.6% increase on the same period in 2016; 490,845 guests stayed in our hotels as the year came to a close.

December recorded double-digit percentage growth in visitors from all out Tier 1 overseas markets, with visitors from the US increasing by approximately 55%, China by approximately 40%, India by 29%, the UK by approximately 23% and Germany by approximately 13%. Remarkably, our attractiveness to French travellers - boosted by the opening of Louvre Abu Dhabi - manifested as an increase from France by 61%.

These figures for December translated into an increase for year-on-year figures for China (60%), the US (24%), the UK (14%) and India (11%).

December's UAE guest arrivals total of 143,569 was also an increase on the corresponding month last year, representing an increase of 4.4%, meaning the year-on-year increase for UAE travellers was 2.65%.

The three regions of Abu Dhabi city, Al Ain and Al Dhafra all showed positive results for hotel guests for the year, with the 131 hotels in Abu Dhabi city posting a 10.3% increase in guests arrivals compared to the corresponding year. The number of guest arrivals in the 11 hotels in the Al Dhafra Region increased by 8.2%, with Al Ain Region's 20 hotels showing an 5.5% increase for the same metric.

Alongside these positives sat figures which represented the challenges still apparent in the emirate, with 'Occupancy Rates' still under pressure.

Abu Dhabi City posted a fractional decrease of 0.1% in Occupancy Rates for 2017 (actual rate, 74%), with Al Ain decreasing by 10.3% (to 59% for the year) and Al Dhafra decreasing by 31.9% (to 46%). These numbers highlight the issues we are still working hard to address.

As we head into Q1 of the new year, we expect the assets that have recently come online – Louvre Abu Dhabi being the most prominent – to supplement our already established assets and events to provide the platform for another record-breaking year, with Chinese New Year events on Al Maryah Island in February providing an especially attractive draw to guests from China.

In addition, we can also look forward to further boosts to our global profile and attractiveness as 2018 develops with the opening of the latest attraction on Yas Island - Warner Bros. World Abu Dhabi.

As ever, we look forward to working with you over the coming months.

Yours sincerely,

Saif Saeed Ghobash

Director General, Department of Culture & Tourism

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DECEMBER 2017

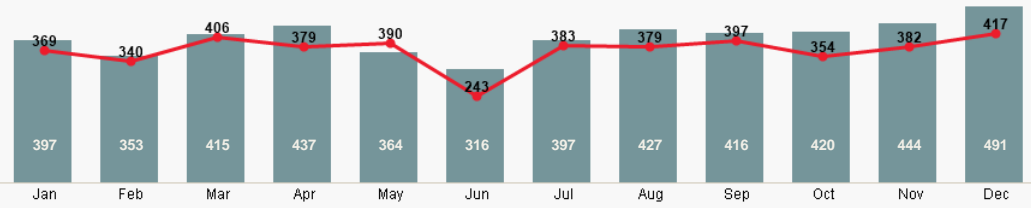
OVERALL PERFORMANCE



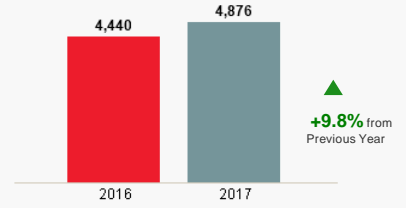
162 HOTELS WITH 30,574 ROOMS

■ 2016 ■ 2017

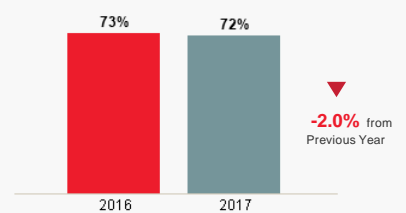
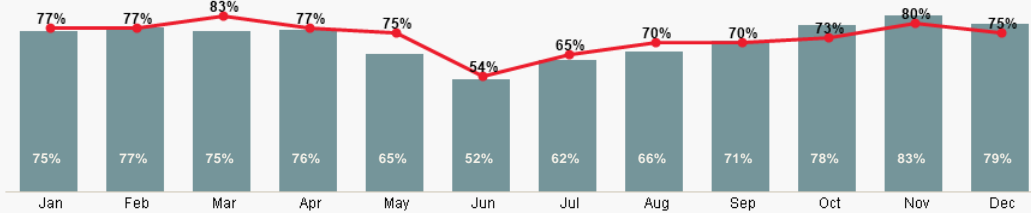
HOTEL GUESTS (000)



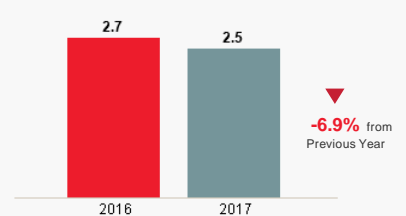
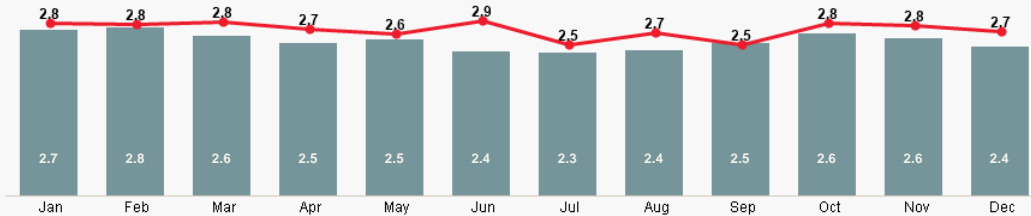
YTD (JAN- DEC)



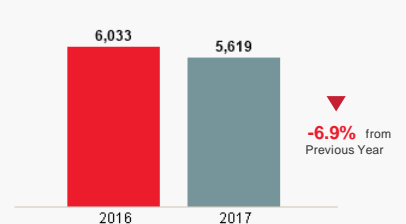
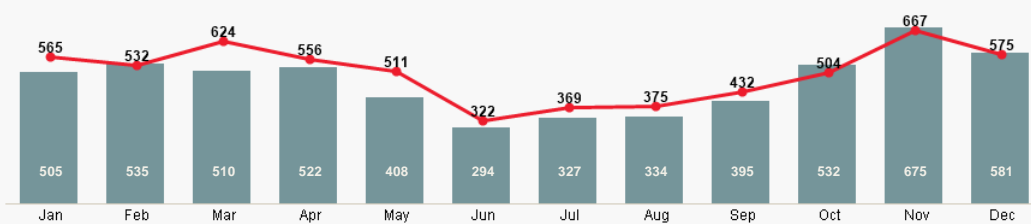
OCCUPANCY RATE



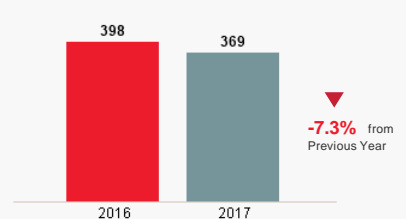
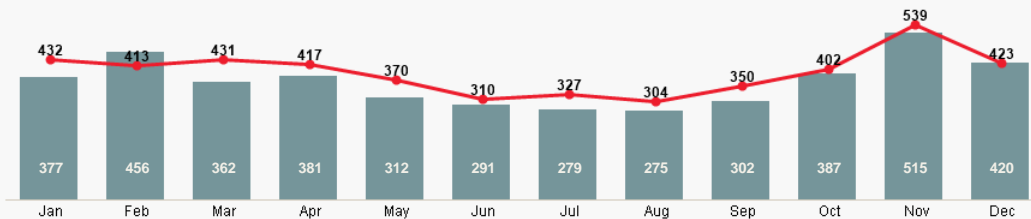
AVERAGE LENGTH OF STAY (ALOS-DAYS)



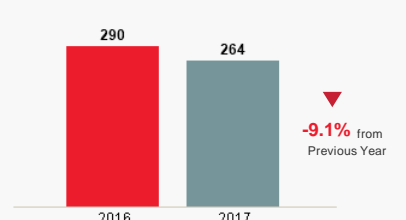
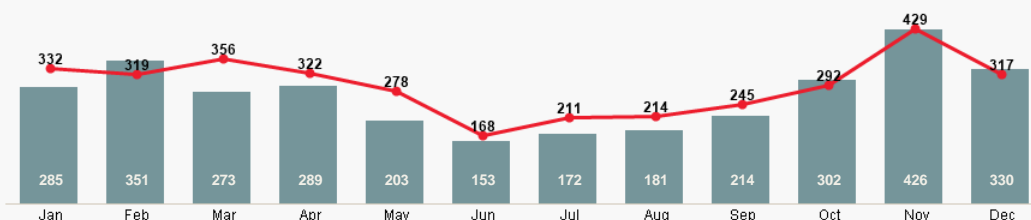
HOTEL TOTAL REVENUE (MILLION UAE)



AVERAGE ROOM RATE (AAR) (UAE)



REVENUE PER AVAILABLE ROOM (RPAR) (UAE)

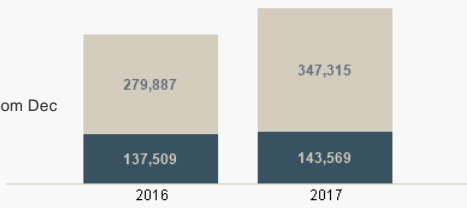




490,845
HOTEL GUESTS

■ Non UAE ■ UAE

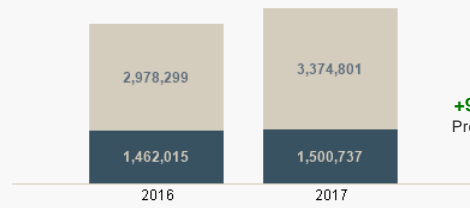
▲ **+17.6%** from Dec 2016



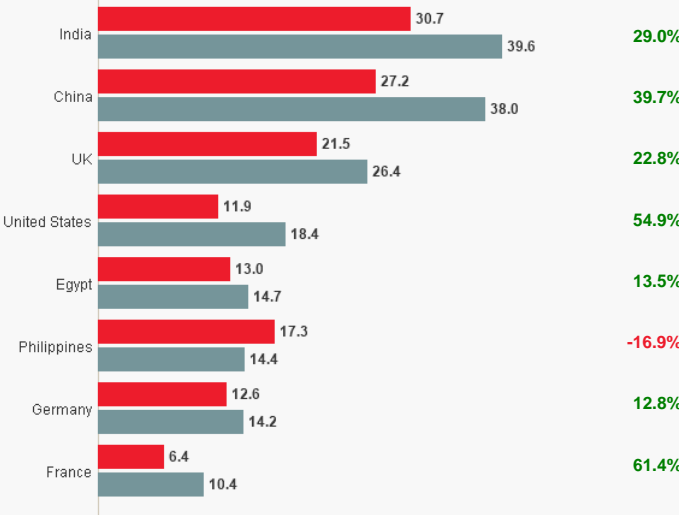
DECEMBER 2017 YTD (JAN- DEC) 2017

4,875,499
HOTEL GUESTS

▲ **+9.8%** from Previous Year

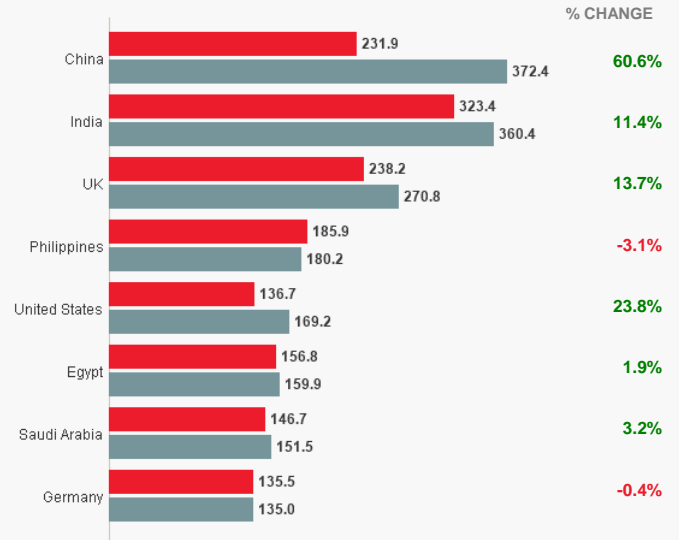


■ 2016 ■ 2017

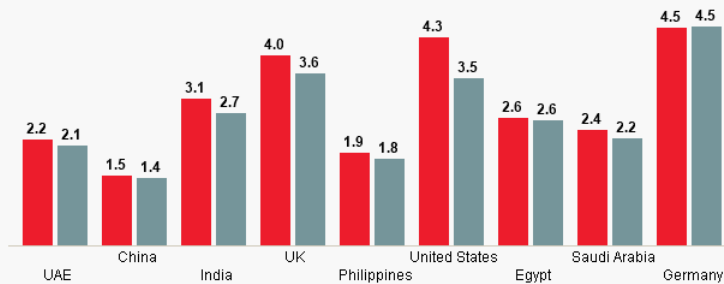
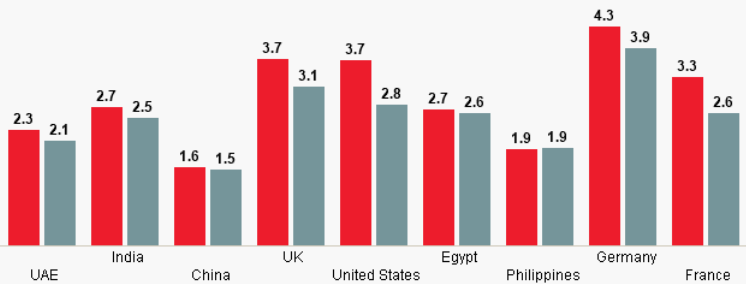


TOP NON-UAE NATIONALITIES (000)

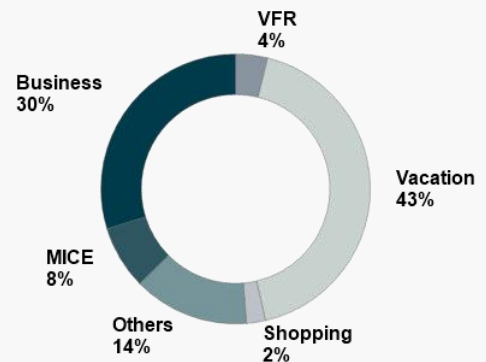
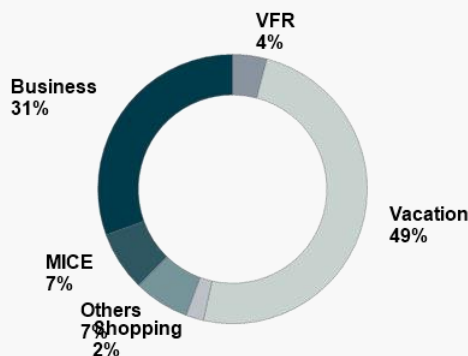
% CHANGE



ALOS BY NATIONALITY (DAYS)



TRIP MAIN PURPOSE

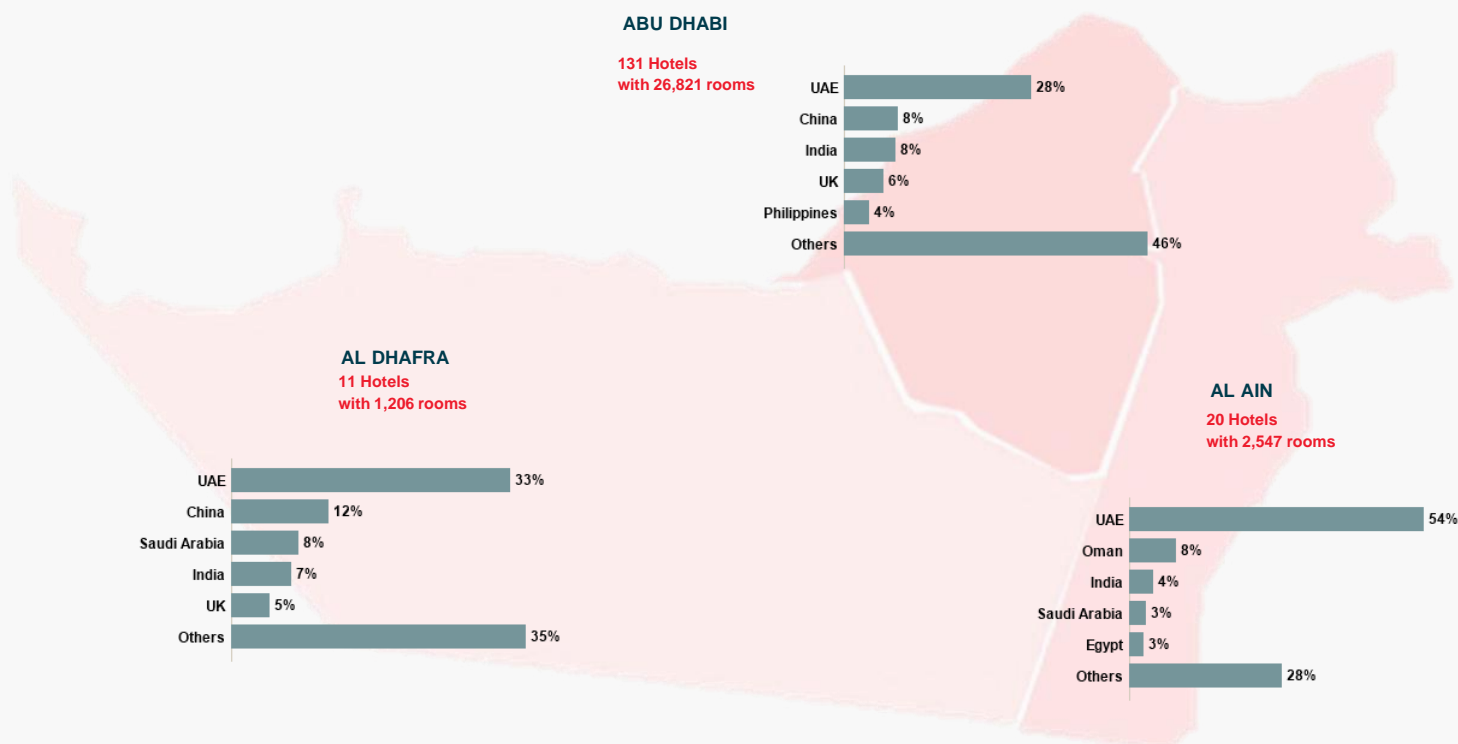


DECEMBER 2017

PERFORMANCE BY REGION

DEC 2017	ABU DHABI		AL AIN		AL DHAFRA	
	Actual	% Change Previous Year	Actual	% Change Previous Year	Actual	% Change Previous Year
GUESTS	429,067	18.6% ▲	47,343	9.0% ▲	14,474	19.1% ▲
OCCUPANCY RATE	81%	7.5% ▲	66%	-5.0% ▼	52%	-30.3% ▼
ALOS (DAYS)	2.5	-9.6% ▼	1.9	2.2% ▲	2.2	-33.2% ▼
REVENUES (M AED)	518.8	3.1% ▲	33.4	-5.3% ▼	28.4	-23.5% ▼
ARR (AED)	411	1.2% ▲	354	-12.1% ▼	934	11.8% ▲
REVPAR (AED)	333	8.8% ▲	234	-16.5% ▼	485	-22.1% ▼

SUPPLY AND TOP NATIONALITIES YTD (JAN- DEC)



YTD (JAN- DEC) 2017	ABU DHABI		AL AIN		AL DHAFRA	
	Actual	% Change Previous Year	Actual	% Change Previous Year	Actual	% Change Previous Year
GUESTS	4,295,030	10.3% ▲	450,328	5.5% ▲	130,180	8.2% ▲
OCCUPANCY RATE	74%	-0.1% ▼	59%	-10.3% ▼	46%	-31.9% ▼
ALOS (DAYS)	2.6	-6.6% ▼	1.9	-4.1% ▼	2.5	-24.4% ▼
REVENUES (M AED)	5,080.6	-5.1% ▼	325.6	-11.8% ▼	212.5	-31.9% ▼
ARR (AED)	366	-5.9% ▼	320	-14.9% ▼	612	-7.6% ▼
REVPAR (AED)	270	-5.9% ▼	189	-23.7% ▼	283	-37.1% ▼

DECEMBER 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

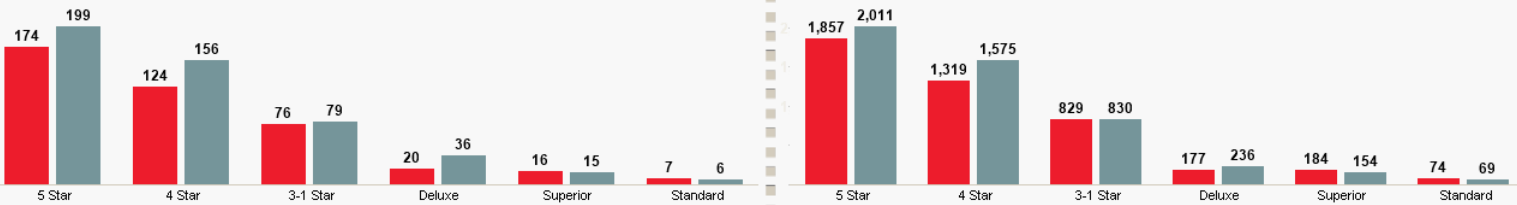
SUPERIOR
16 HOTELS
1,796 ROOMS

STANDARD
12 HOTELS
711 ROOMS

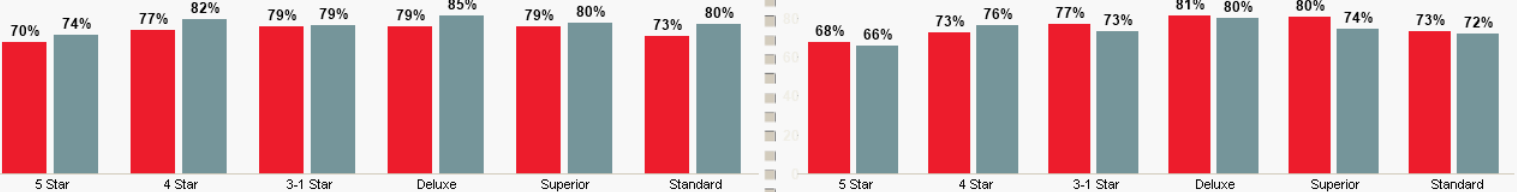
■ 2016 ■ 2017

DECEMBER 2017 YTD (JAN- DEC) 2017

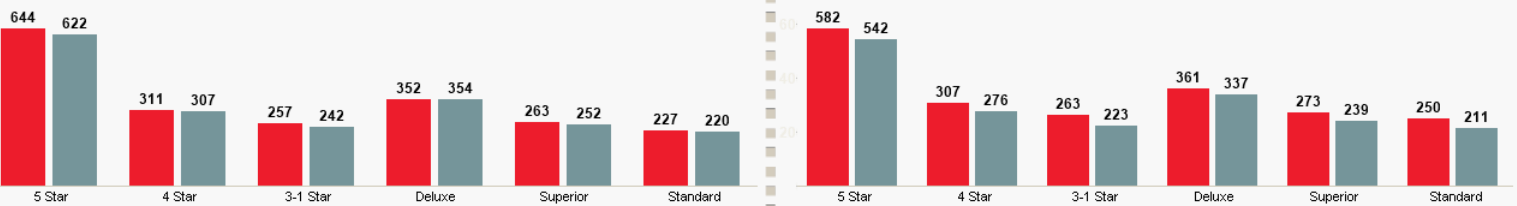
HOTEL GUESTS (000)



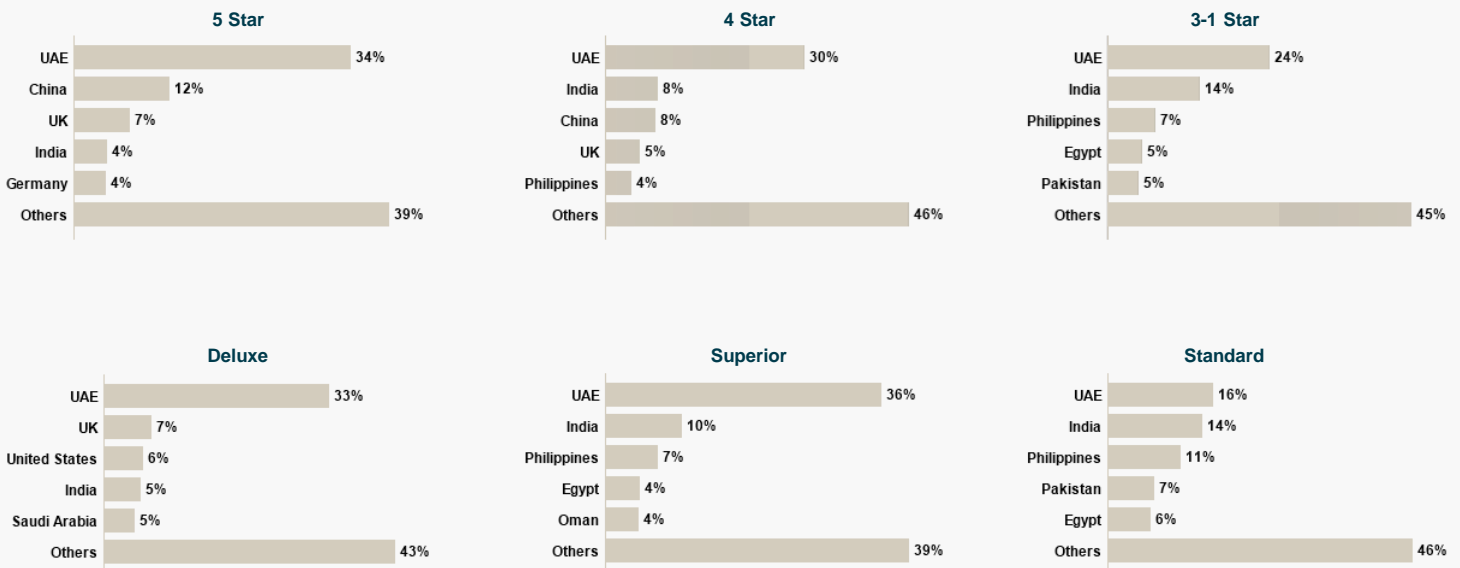
OCCUPANCY RATE (%)



ARR (AED)



TOP NATIONALITIES YTD (JAN- DEC)



DECEMBER 2017

UPCOMING EVENTS



FEB 2018

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY		
				1	Red Bull Air Race World Championships (Feb 2 to Feb 3) 📍 Abu Dhabi	2 Sultan Bin Zayed Heritage Festival 2018 (Jan 21 to Feb 3) 📍 Sweihan City	3	
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	Chinese New Year at Ferrari World (Feb 16 to Feb 26) 📍 Abu Dhabi	16	17
18	19	20	21	Abu Dhabi Tour 2018 (Feb 22 to Feb 25) 📍 Abu Dhabi	22	23	24	
Unmanned Systems Exh & Conference The Simulation & Training Exh. & Conference (Feb 25 to Feb 27) 📍 Abu Dhabi	25	26	27	28				

MAR 2018

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY			
				1	ITU World Triathlon 2018 (Mar 2 to Mar 3) 📍 Abu Dhabi	2	3		
4	5	6	Imagine Science – Film Festival (Mar 7 to Mar 10) 📍 Abu Dhabi	7	Abu Dhabi Festival 2018 (Mar 8 to Mar 30) 📍 Abu Dhabi	8	9	10	
Orchestra dell'Accademia Nazionale di Santa Cecilia - Romw (Mar 11 & 12) 📍 Abu Dhabi	11	12	13	Waves of My Life by Emirati Composer Ihab Darwish (Mar 14) 📍 Abu Dhabi	14	Opera in Concert (Mar 15) 📍 Abu Dhabi	15	16	17
18	19	20	Ramagala Dance – Written in Water (Mar 21 & 22) 📍 Abu Dhabi	21	22	23	24		
25	26	27	28	Don Quixote: Compania Nacional de Danza (Mar 29 & 30) 📍 Abu Dhabi	29	Harlem Globetrotters (Mar 30 & 31) 📍 Abu Dhabi	30	31	



New Year Celebrations: At the stroke of midnight, fireworks set ablaze Abu Dhabi's skyline, ringing in the New Year with tens of thousands of gathered onlookers across the capital. Accompanied by incredible pyrotechnic effects, the fifteen-minute fireworks display at the *New Year's Eve Countdown Village* mesmerised the crowd as they joined in the festivities at the specially designed venue on Abu Dhabi Corniche. The capital brought in the New Year with a fireworks show in a number of locations, including the New Year's Eve Countdown Village, Corniche, Yas Island, and Al Maryah Island. Arab Superstars Hussain Al Jassmi and Tamer Hosny, with the King of Comedy, Ali Al Sayed, joined the celebrations.



Dar Al Zain: The first Dar Al Zain Festival in Al Ain, held between Thursday 14th to Saturday 23rd December was heralded as a resounding success. The festival featured an exciting line-up of all-day and evening events for the whole family to enjoy – all encapsulated in an outdoor village packed with entertainment, shopping, food and fun activities. The festival wrapped up with live music performances from A-list Arab celebrities Balqees Fathi and Majid Al Mouhandis, who enthralled audiences with their hits.



Visitor Figures: The opening of the Louvre Abu Dhabi and the hosting of the Formula 1 Etihad Airways Abu Dhabi Grand Prix contributed to a dramatic surge in hotel guests in the emirate during November. The month saw a 16% rise in guests staying in the emirate's 162 hotels and hotel apartments compared to the same period in 2016.

With 4.3 million hotel guests staying in accommodation across Abu Dhabi city, the Al Ain Region and Al Dhafra Region in the first 11 months of the year, the emirate has witnessed 9% year-on-year growth and is on target to reach a record 4.9 million guests by the end of December.

During November, guests from the US increased by 50%, while the China, UK and Germany saw rises of 38%, 36% and 21% respectively. In total 443,636 guests stayed in the emirate, with 322,506 international visitors and 121,130 domestic visitors.



Abu Dhabi Food Festival: Spread over 17 days and taking in three weekends, the festival cooked up a storm and brought food-lovers, families and friends together to enjoy cuisine from some of the best street food chefs as well as some of the most scrumptious food available in the region. There were several new features; from the Food-Truck-meets-fun fair Truckers Carnival and reggae-fuelled Caribbean Beach Feast to the culinary and cinematic 'Delicious Cinema' experience and fun family day out at the Big PikNik. The Abu Dhabi Food Festival ran from December 7th until December 23rd.



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