

HOTEL REPORT

JUNE 2018





Dear friends,

The June figures for hotel performance allow us to draw a line under the first half of 2018; this is a report with both positives and negatives to take into consideration.

Our ultimate aim of achieving a new benchmark visitor figure for the year is currently still on track and looks in good shape. For the month of June, we can report a 6% increase in the number of hotel guests staying in Abu Dhabi compared with the same period in 2017. In total, 339,592 hotel guests were recorded in the emirate's 162 hotels and hotel apartments.. This represents an increase of more than 19,000 compared to June 2017.

The latest figures also show that the June arrivals are driven by increases in uptake from both Saudi Arabia and the United States, with both countries posting significant percentage growth (approximately 57% and 27% respectively).

The influx of additional Saudi guests can naturally be attributed, at least in part, to the Holy Month of Ramadan. It is worth noting that last year's Ramadan included 24 June days, but only 14 days in 2018, Despite this unfavourable comparison, the number of Saudi hotel guest were only 4.6% below 2017 numbers. Conversely, the June figures from the US for June were up by almost 26% on a year-to-date basis.

The emirate's popularity with Chinese visitors took a dip in June, with the country posting an almost 11% decline in visitation numbers. This meant China lost its place as the No.1 overseas source market for this month – but 2018 to date, the country still represents Abu Dhabi's largest overseas source of guests (almost 16% up for the year) .

Visitor numbers were in healthy territory for other key markets, with India taking top spot for June with more than 29,900 Indian guests arriving, which represented a 3.7% increase from June 2017. This contributed to an increase of 19% for the country so far this year.

The UK posted a 14.5% increase for the month, a 12.9% increase for the Year-to-date. Regionally speaking, hotel guest numbers were positive for the month in Abu Dhabi City (5.6%), Al Ain (7.6%) and Al Dhafra (15.3%). Occupancy Rates were also in positive territory in all three regions (6.4%, 8.5% and 22.2% respectively).

In contrast to these positive metrics, we must continue to acknowledge the challenges we are facing: in June, Total Revenues and Revenue per Available Room (RevPAR) increased only slightly (around 1%) compared to June 2017, but Average Room Rate (ARR) decreased by about 6%. On a year-to-date basis, Hotel Revenues are down 4.5%, ARR is down 6.9% and RevPAR is down 5%.

As ever, we consider this a joint responsibility that we are looking to address in concert with your efforts, as we look to bring all our metrics into positive territory.

As we head into the second half of the year, DCT Abu Dhabi will maintain the momentum we have already generated in 2018, with our traditionally strong line-up of events from July to December a key driver for our collective ambitions.

Yours sincerely,

Saif Saeed Ghobash

Undersecretary, Department of Culture & Tourism – Abu Dhabi

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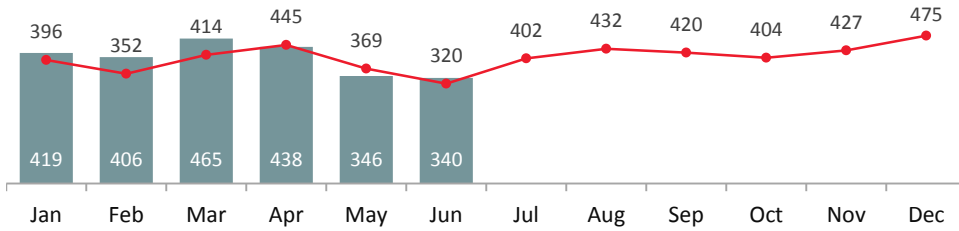
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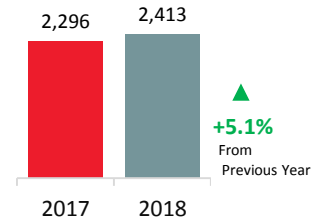
2017 2018

162 Hotels with 31,545 rooms

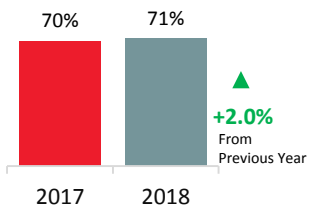
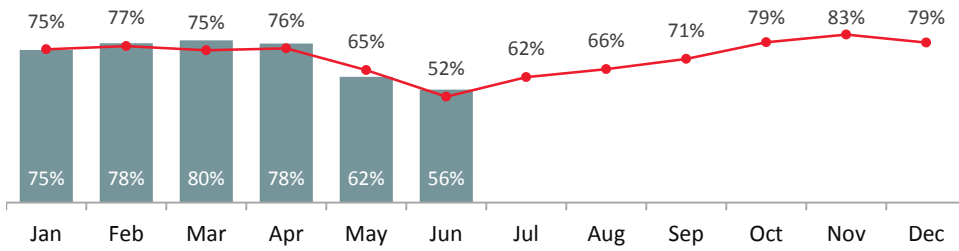
HOTEL GUESTS (000)



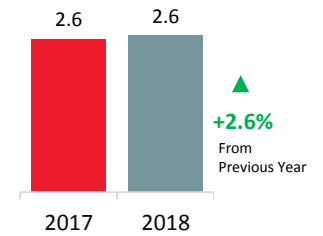
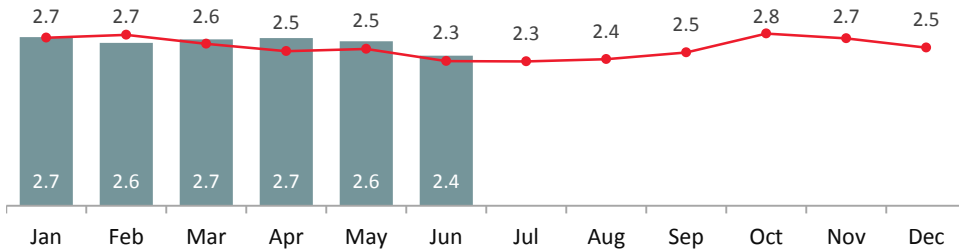
YTD (JAN- JUN)



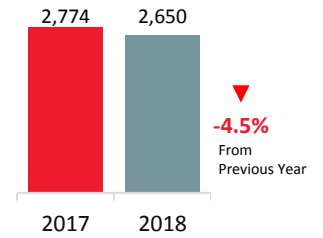
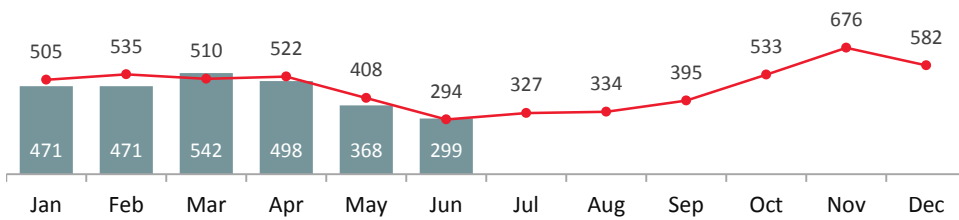
OCCUPANCY RATE



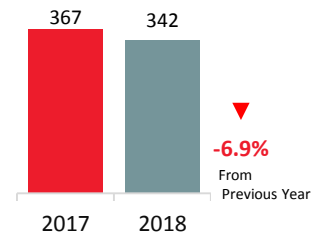
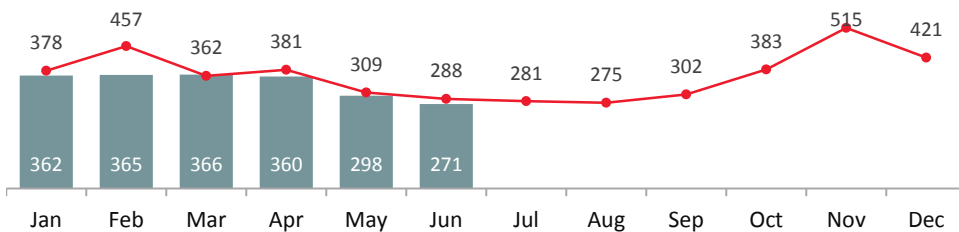
AVERAGE LENGTH OF STAY (ALOS-DAYS)



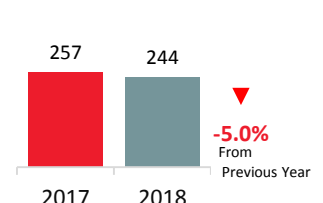
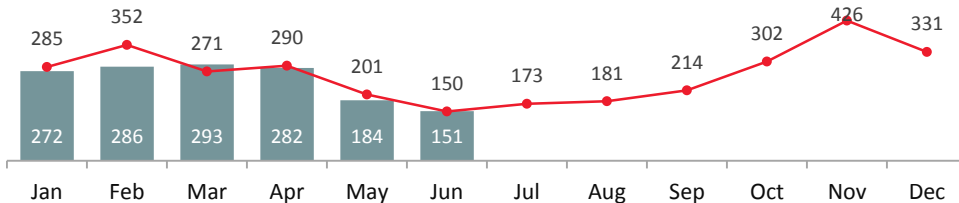
HOTEL TOTAL REVENUE (MILLION UAE)



AVERAGE ROOM RATE (UAЕ)



REVENUE PER AVAILABLE ROOM (UAЕ)



JUNE 2018

HOTEL GUESTS

339,592

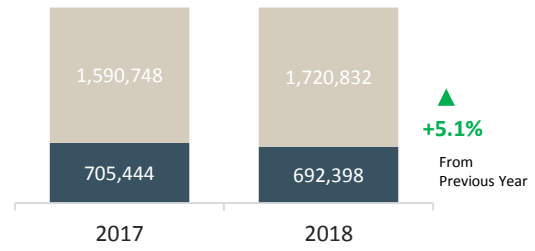
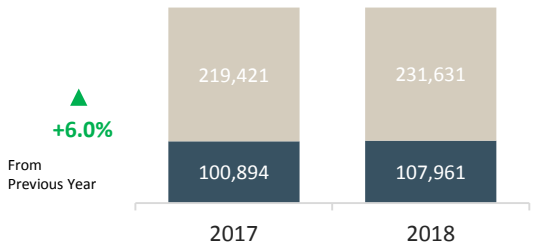
HOTEL GUESTS

JUNE 2018

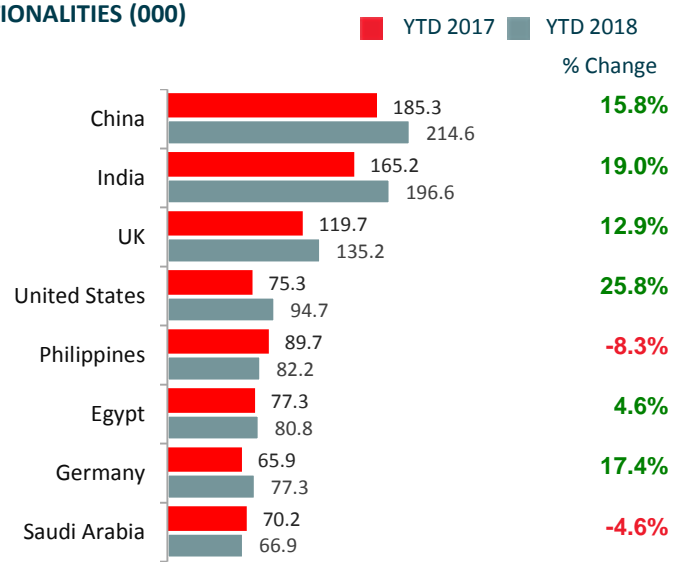
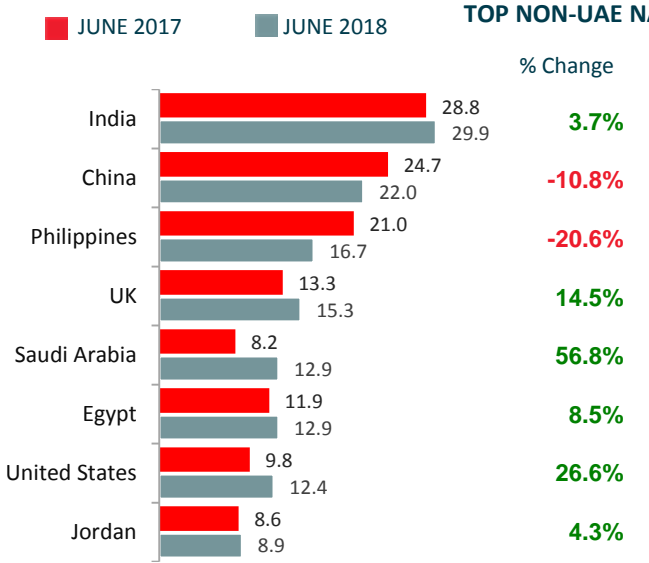
YTD (JAN- JUN) 2018

2,413,230

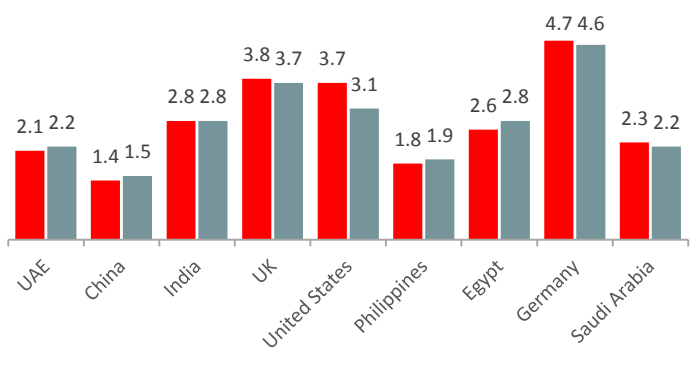
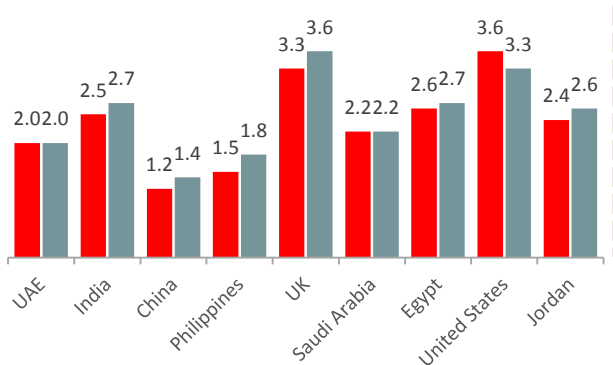
HOTEL GUESTS



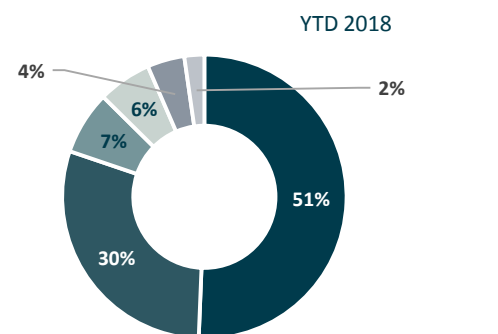
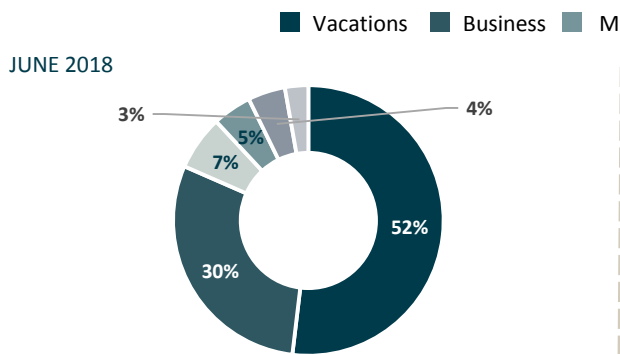
TOP NON-UAE NATIONALITIES (000)



ALOS BY NATIONALITY (DAYS)

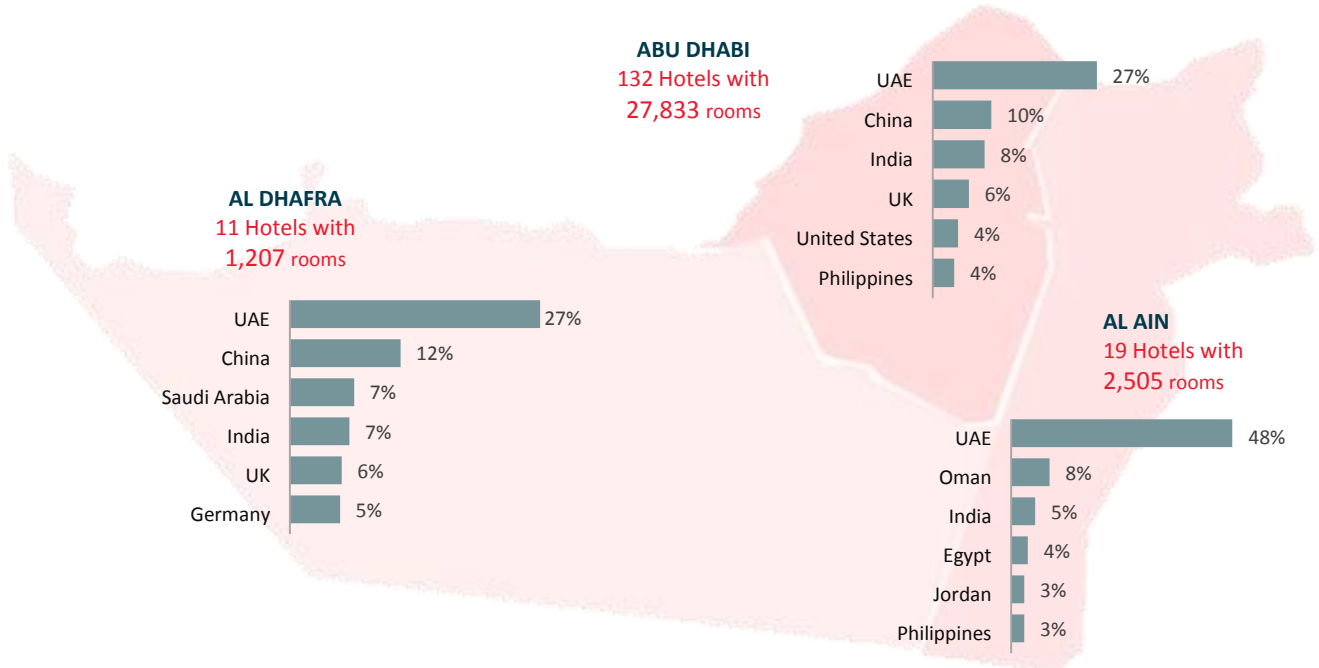


TRIP MAIN PURPOSE



JUNE 2018	ABU DHABI			AI AIN			AI DHAFRA		
	Actual	% Change vs Previous Year		Actual	% Change vs Previous Year		Actual	% Change vs Previous Year	
GUESTS	300,614	5.6%	▲	30,224	7.6%	▲	8,754	15.3%	▲
OCCUPANCY RATE	57%	6.4%	▲	47%	8.5%	▲	31%	22.2%	▲
ALOS DAYS	2.5	4.6%	▲	1.9	-5.3%	▼	2.1	4.3%	▲
REVENUES (M AED)	269.6	1.9%	▲	20.3	-0.3%	▼	8.8	-0.1%	▼
ARR (AED)	268	-5.1%	▼	276	-7.4%	▼	389	-25.1%	▼
REVPAR (AED)	154	1.0%	▲	131	0.5%	▲	121	-8.4%	▼

SUPPLY AND TOP NATIONALITIES - YTD 2018



YTD (JAN- JUN) 2018	ABU DHABI			AI AIN			AI DHAFRA		
	Actual	% Change vs Previous YTD		Actual	% Change vs Previous YTD		Actual	% Change vs Previous YTD	
GUESTS	2,134,014	5.3%	▲	206,991	1.5%	▲	72,225	9.4%	▲
OCCUPANCY RATE	74%	3.1%	▲	56%	-5.3%	▼	44%	-12.5%	▼
ALOS DAYS	2.7	3.2%	▲	2.0	0.5%	▲	2.1	-14.4%	▼
REVENUES (M AED)	2,394.9	-4.1%	▼	143.4	-12.6%	▼	111.7	-1.1%	▼
ARR (AED)	337	-7.0%	▼	288	-13.9%	▼	646	11.7%	▲
REVPAR (AED)	250	-4.1%	▼	161	-18.4%	▼	287	-2.3%	▼



46 HOTELS
13,112 ROOMS



38 HOTELS
8,182 ROOMS



33 HOTELS
4,583 ROOMS

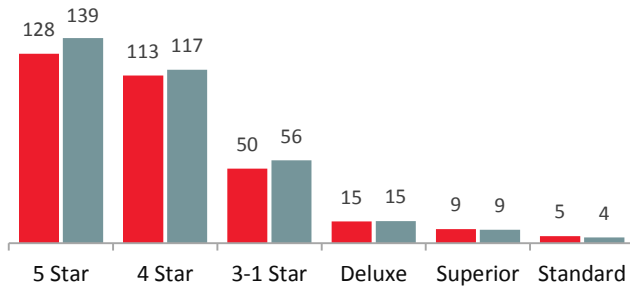
DELUXE
19 HOTELS
3,327 ROOMS

SUPERIOR
15 HOTELS
1,725 ROOMS

STANDARD
11 HOTELS
616 ROOMS

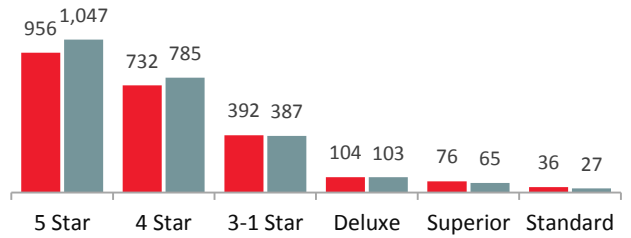
HOTEL GUESTS (000)

JUNE 2017 JUNE 2018

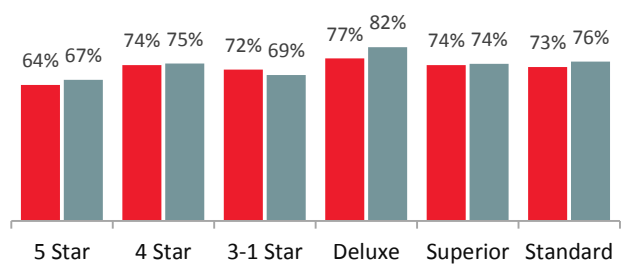
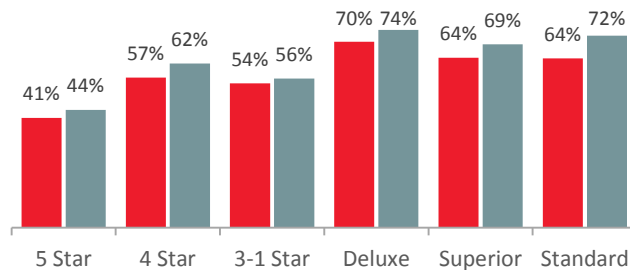


HOTEL GUESTS (000)

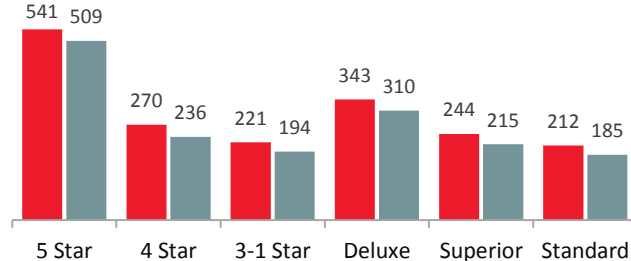
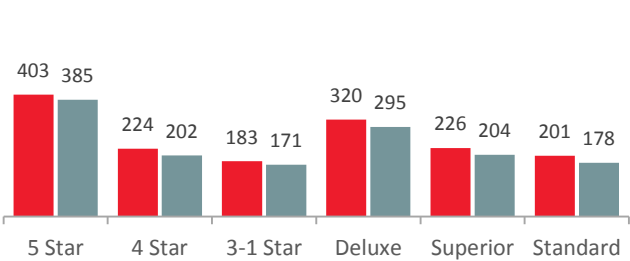
YTD 2017 YTD 2018



OCCUPANCY RATE (%)

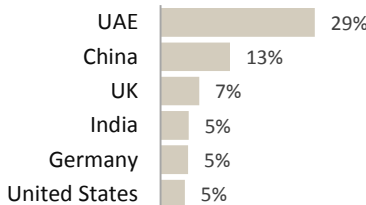


ARR (AED)

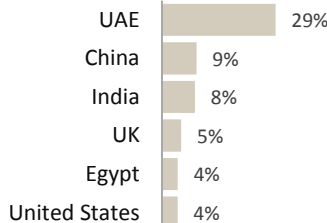


TOP NATIONALITIES YTD - 2018

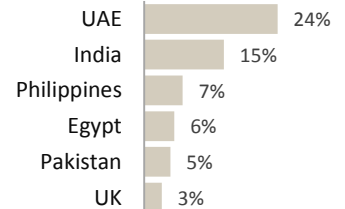
5 Star



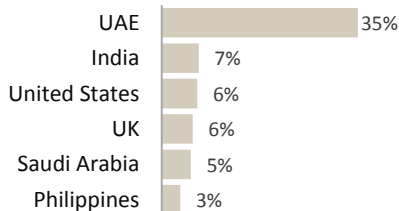
4 Star



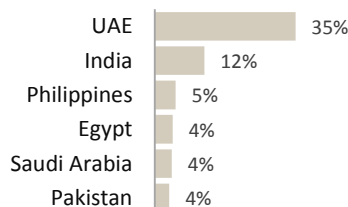
3-1 Star



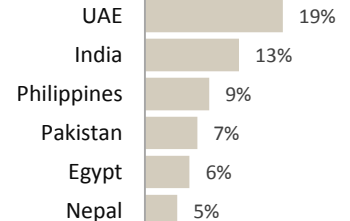
Deluxe



Superior



Standard



JUNE 2018

UPCOMING EVENTS



JULY 2018



'Around the World' Summer Programme

Jul 01 - Aug 31, 2018

Al Bahja Library, Al Wathba Library, Zayed Central Library, Marfa Library, Mazyad Library, Khalifa Park Library

FREE ARTS



Around the World

Jul 04 - Aug 13, 2018

Bawadi Mall, Al Ain, Abu Dhabi

FREE FAMILY



Abu Dhabi Sports Festival 2018

Jul 08 - Aug 20, 2018

Zayed Sports City, Abu Dhabi

TICKETED SPORTS



Liwa Date Festival

Jul 18 - Jul 27, 2018

Liwa Dates Festival, Al Dhafra

FREE CULTURE



ALL DAY LIVE

Jul 26 - Jul 28, 2018

Emirates Palace, Abu Dhabi

TICKETED FAMILY



Unite with Tomorrowland

Jul 28, 2018

du Arena, Abu Dhabi

TICKETED FAMILY

AUGUST 2018



Nickelodeon Experience

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

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

Eid Al Fitr: The Department of Culture and Tourism – Abu Dhabi (DCT Abu Dhabi) in association with the Department of Economic Development of Abu Dhabi (DED) recently concluded a 24-hour mall mega sale, featuring discounts of up to 90 per cent, as part of 2018's Eid Fest celebrations. The one-day event saw more than 1,500 stores involved, with more than 455,000 visitors from across the region and beyond coming to Abu Dhabi to celebrate this special occasion.



Abu Dhabi Summer Season: The much-loved and hugely popular Abu Dhabi Summer Season (ADSS) is back. Running from Thursday, 21st June until Saturday, 18th August, UAE residents and visitors will have the chance to win a whole host of exciting prizes and deals as they 'Unbox the Amazing' at participating malls.

'Unbox the Amazing' was created especially for ADSS 2018, where for every AED250 spent shoppers will get the chance to register digitally for a chance to win instant prizes, including vouchers for luxury dining at Abu Dhabi's high-end hotel restaurants, and also gain entry into the grand raffle with the chance of winning a car.



Department leads trade meeting with Saudi delegation: The Department successfully hosted a three-day delegation of ten key stakeholders and senior travel experts from the Kingdom of Saudi Arabia (KSA) between June 29th and July 1st. Given KSA's important source-market status, this high-level trade meeting was focused on ways to leverage opportunities and address challenges as Abu Dhabi aims to attract 5.5 million visitors by end of 2018, with Saudi travellers making up a significant percentage of that total.

Department Concludes Successful Roadshow in Kazakhstan and Ukraine:

Promotional activities recently organized by the Department in Kazakhstan and Ukraine aimed to reinforce ties with key stakeholders in these markets and capitalize on newly-relaxed visa rules for Kazakh and Ukrainian travellers. The Kazakhstan roadshow attracted more than 90 local travel trade experts, with the Ukrainian roadshow attracting more than 120 stakeholders.



The delegation representing Abu Dhabi in Almaty and Kiev included representatives from Etihad Airways and Yas Experiences, along with hotels including Yas Viceroy, St. Regis Abu Dhabi, Fairmont Bab Al Bahr, Saadiyat Rotana, Royal Rose, InterContinental Abu Dhabi and Al Raha Beach Hotel.



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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