

# HOTEL REPORT

## AUGUST 2018





18 September, 2018

Dear friends,

The August figures for hotel performance present a slightly varied, but ultimately encouraging picture of 2018 to date.

As ever, we seek to maximise inbound tourism with a view to surpassing last year's figures, and in this regard, August's report backs up our confidence that this ambition will be realised. For the month of August, we can report a 10.5% increase in the number of hotel guests staying in Abu Dhabi compared with the same period in 2017. In total, 477,606 visitors resided in the emirate's 162 hotels and hotel apartments during the month. This represents an increase of more than 45,000 compared to August 2017, bringing the total number of hotel guests to more than 3.31 million guests, a 5.8% rise in guest numbers for to date.

The latest figures also show that the August arrivals are driven by increases in uptake from almost all of our key markets. Only Germany posted a decline this month. India, Saudi Arabia, Egypt, Jordan, the Philippines and most notably, the US all registered double-digit growth for August.

The influx of guests can be attributed, at least partially, to the enduring appeal of Abu Dhabi Summer Season, but other 'new' assets which we have introduced into our tourism proposition - including Warner Bros World Abu Dhabi - must be factored in as well.

The Chinese market recorded a strong improvement during this month, up by almost 9 per cent compared to August 2017. In July, it was noted that the number of Chinese guests increased marginally by 0.3%, while it declined by almost 11% in June. On a Year-to-Date, China is still Abu Dhabi's top source market – up about 13% in total compared to 2017.

It was pleasing to see significant growth also recorded in the number of Indian hotel guests – 22% growth during the month of August compared to the previous year. Our neighbours in Saudi Arabia also contributed, with Saudi guests increasing for a third consecutive month during August.

Visitor numbers were in healthy territory for other key markets, with China and the UK also posting numbers in positive territory (an 8.8% increase for the People's Republic and a 3.6% increase for the UK).

On a Year-To-Date basis, we recognise that, although Hotel guests, Occupancy rates and Average Length of Stay (ALOS) numbers continue to show growth, total revenues, Average Room Rates (ARR) and Revenue per Available Room (RevPar) metrics are still in decline compared to 2017.

These metrics continue as challenges we still face as we consider our strategies for bringing *all* of our performance into positive territory.

As we head towards the end of Q3, and into year-end, we are resolute that the momentum we have built up over the previous eight months should not be lost. The end of the year is traditionally a strong period for Abu Dhabi, so we are confident that we can collectively work hard to realise our lofty ambitions.

Yours sincerely,

**Saif Saeed Ghobash**

Undersecretary, Department of Culture & Tourism – Abu Dhabi

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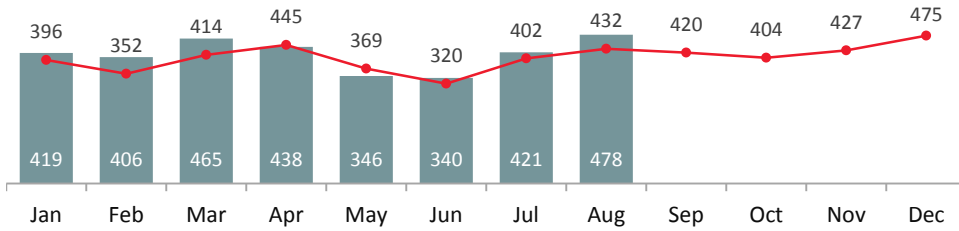
# AUGUST 2018

## OVERALL PERFORMANCE

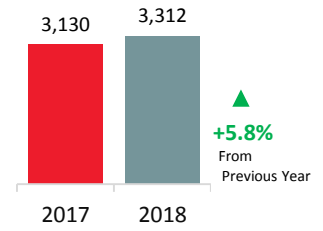
2017 2018

162 Hotels with 31,545 rooms

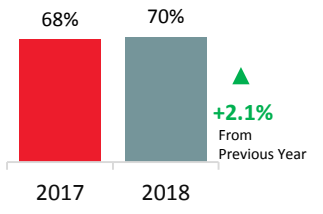
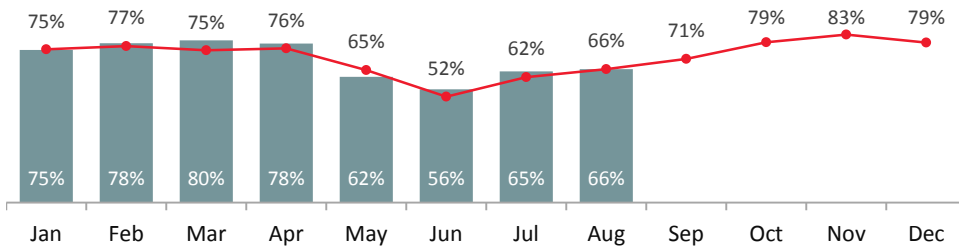
### HOTEL GUESTS (000)



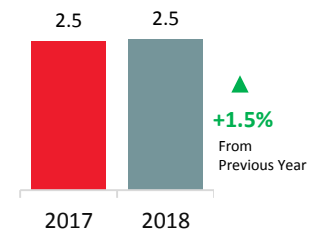
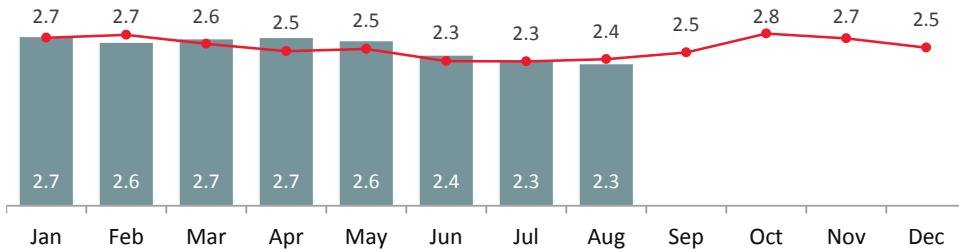
### YTD (JAN- AUG)



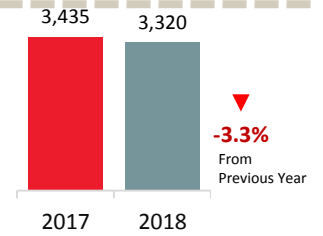
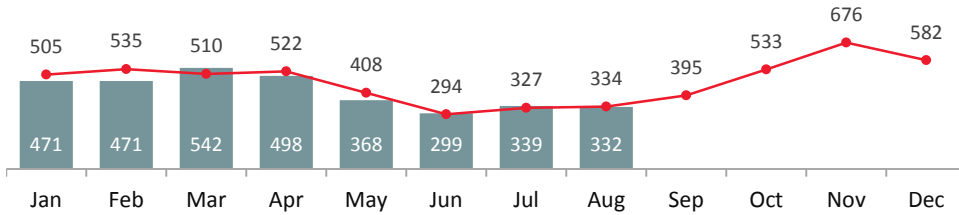
### OCCUPANCY RATE



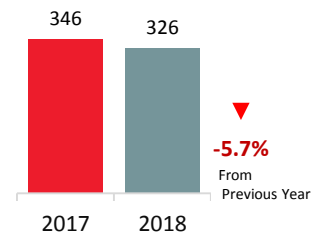
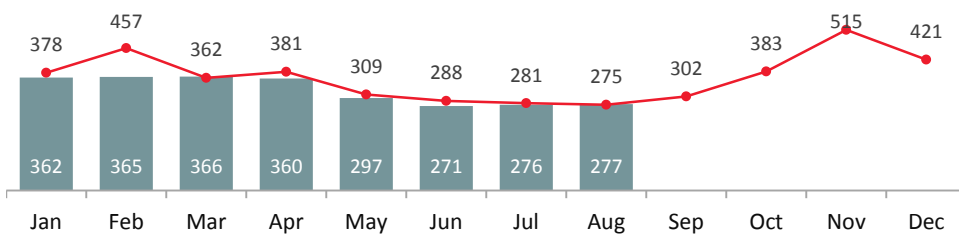
### AVERAGE LENGTH OF STAY (ALOS-DAYS)



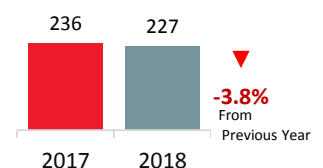
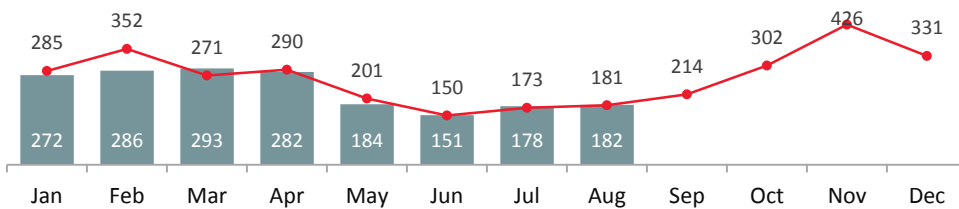
### HOTEL TOTAL REVENUE (MILLION UAE)



### AVERAGE ROOM RATE (UAE)



### REVENUE PER AVAILABLE ROOM (UAE)



# AUGUST 2018

## HOTEL GUESTS

477,606

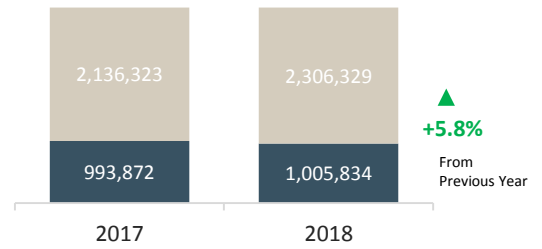
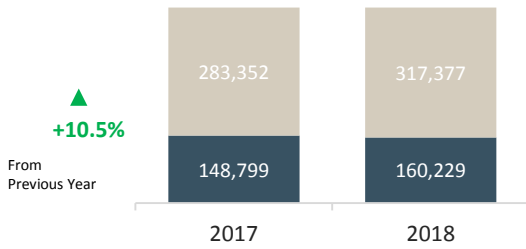
HOTEL GUESTS

AUGUST 2018

YTD (JAN- AUG)  
2018

3,312,163

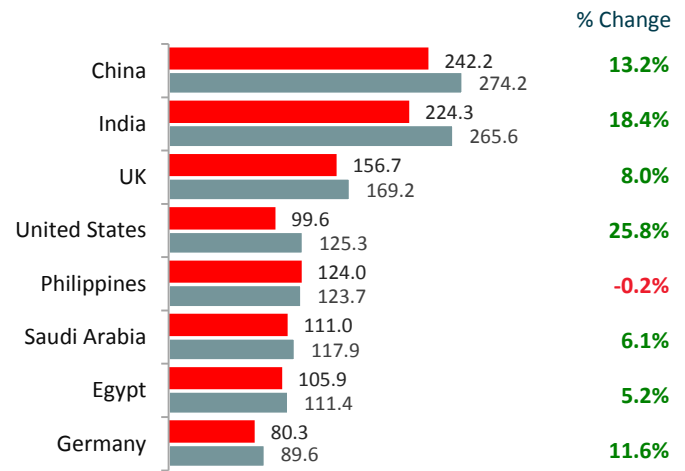
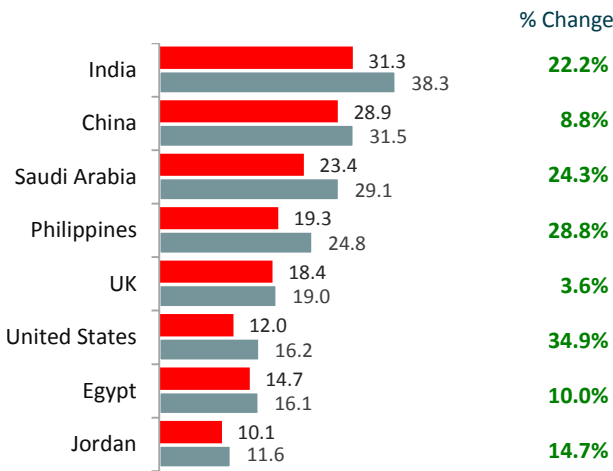
HOTEL GUESTS



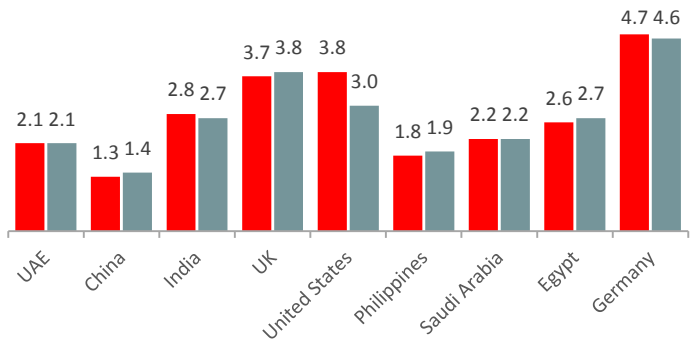
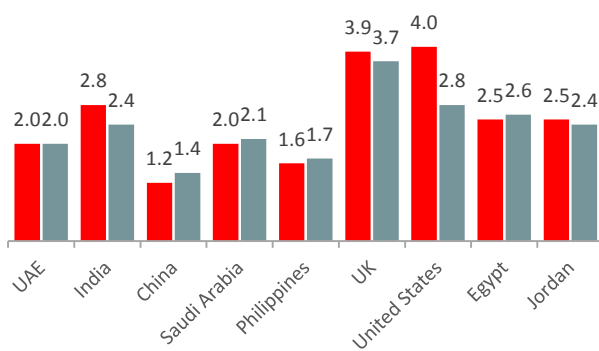
AUGUST 2017 AUGUST 2018

TOP NON-UAE NATIONALITIES (000)

YTD 2017 YTD 2018



ALOS BY NATIONALITY (DAYS)

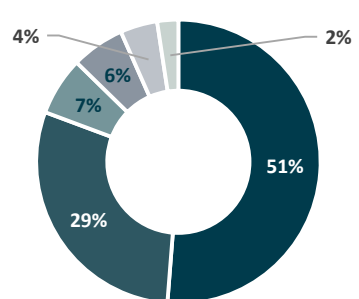
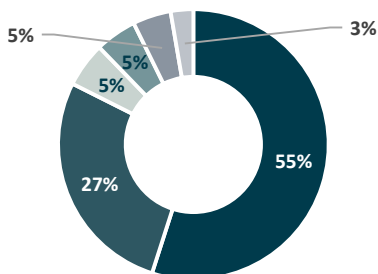


TRIP MAIN PURPOSE

Vacations Business Mice VFR Shopping Others

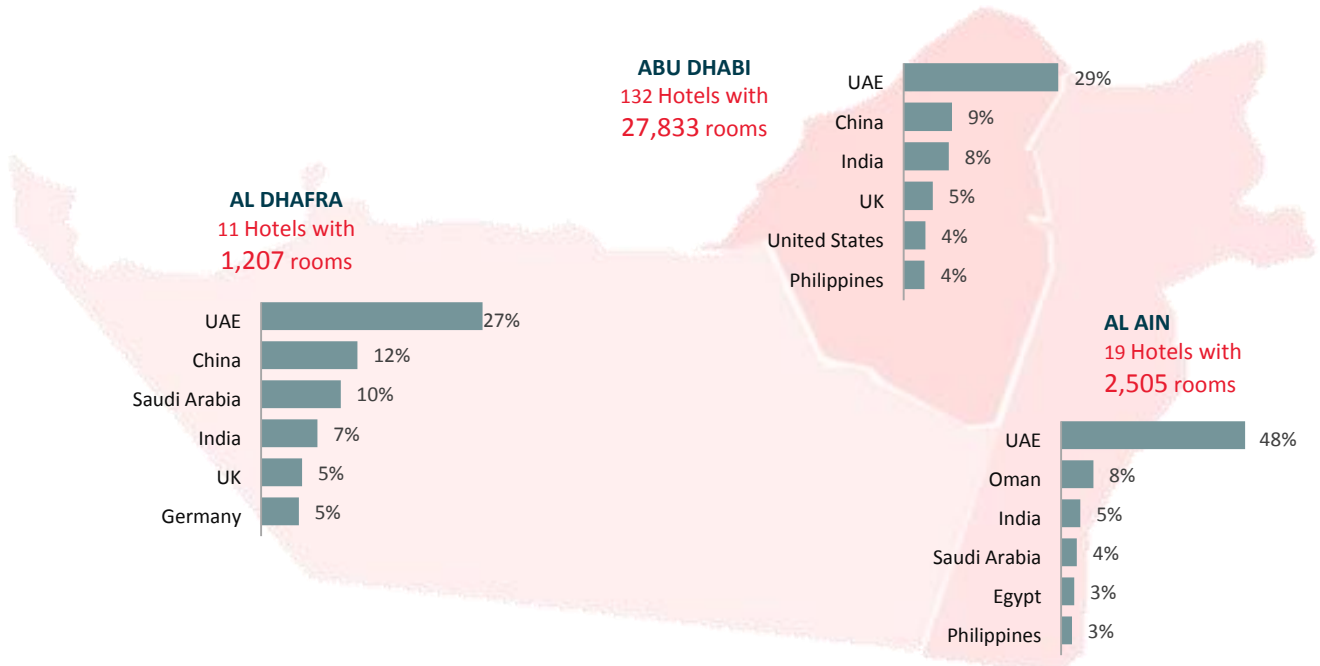
AUGUST 2018

YTD 2018



AUGUST 2018	ABU DHABI			AI AIN			AI DHAFRA		
	Actual	% Change vs Previous Year		Actual	% Change vs Previous Year		Actual	% Change vs Previous Year	
GUESTS	418,770	11.2%	▲	47,287	2.8%	▲	11,549	22.5%	▲
OCCUPANCY RATE	67%	-0.6%	▼	67%	5.6%	▲	39%	8.4%	▲
ALOS DAYS	2.3	-4.3%	▼	1.9	4.4%	▲	2.0	-3.4%	▼
REVENUES (M AED)	295.6	-0.8%	▼	26.2	-2.3%	▼	10.6	15.5%	▲
ARR (AED)	273	0.7%	▲	288	-0.5%	▼	407	3.3%	▲
REVPAR (AED)	182	0.1%	▲	192	5.0%	▲	158	12.0%	▲

### SUPPLY AND TOP NATIONALITIES - YTD 2018



YTD (JAN- AUG)2018	ABU DHABI			AI AIN			AI DHAFRA		
	Actual	% Change vs Previous YTD		Actual	% Change vs Previous YTD		Actual	% Change vs Previous YTD	
GUESTS	2,922,804	6.0%	▲	295,949	2.2%	▲	93,410	12.6%	▲
OCCUPANCY RATE	72%	2.7%	▲	58%	-2.3%	▼	43%	-8.2%	▼
ALOS DAYS	2.6	1.9%	▲	1.9	1.1%	▲	2.1	-12.3%	▼
REVENUES (M AED)	2,996.8	-3.0%	▼	192.5	-10.7%	▼	131.2	0.1%	▲
ARR (AED)	322	-5.7%	▲	284	-11.4%	▼	585	6.5%	▲
REVPAR (AED)	232	-3.1%	▼	164	-13.4%	▼	252	-2.3%	▼





46 HOTELS  
13,112 ROOMS



38 HOTELS  
8,182 ROOMS



33 HOTELS  
4,583 ROOMS

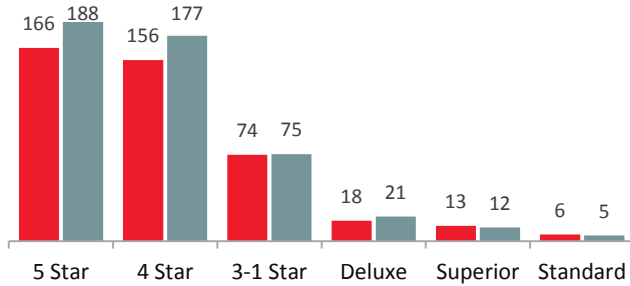
**DELUXE**  
19 HOTELS  
3,327 ROOMS

**SUPERIOR**  
15 HOTELS  
1,725 ROOMS

**STANDARD**  
11 HOTELS  
616 ROOMS

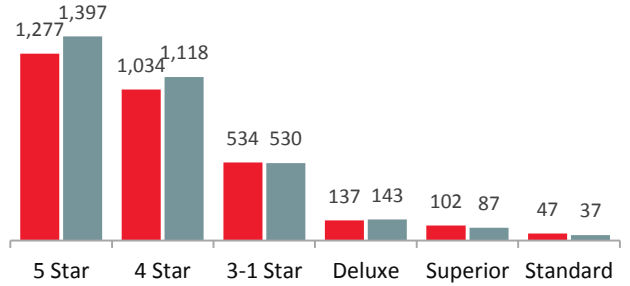
### HOTEL GUESTS (000)

■ AUGUST 2017 ■ AUGUST 2018

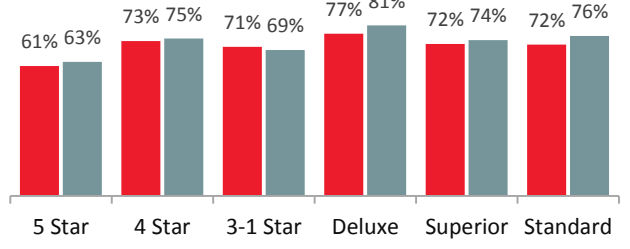
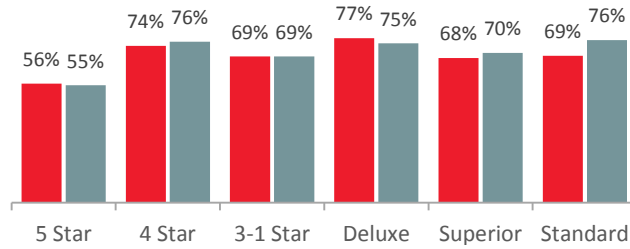


### HOTEL GUESTS (000)

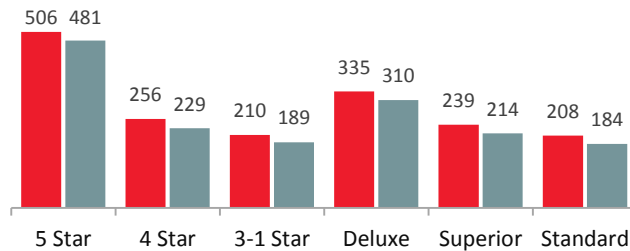
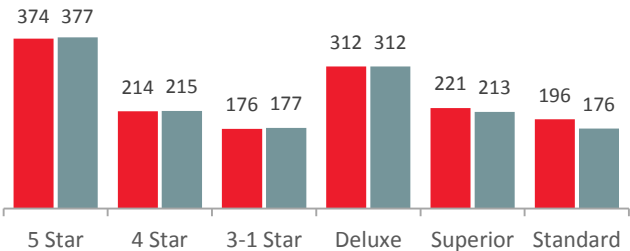
■ YTD 2017 ■ YTD 2018



### OCCUPANCY RATE (%)

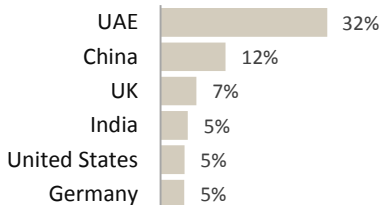


### ARR (AED)

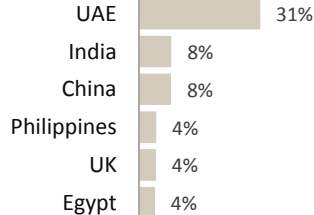


### TOP NATIONALITIES YTD - 2018

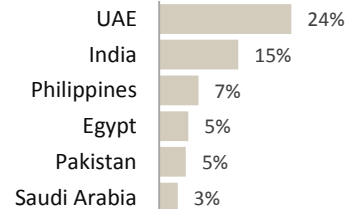
#### 5 Star



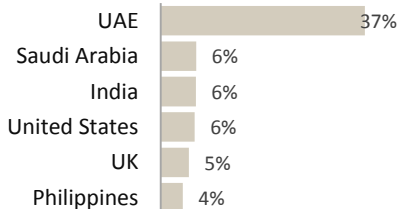
#### 4 Star



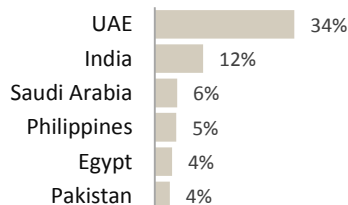
#### 3-1 Star



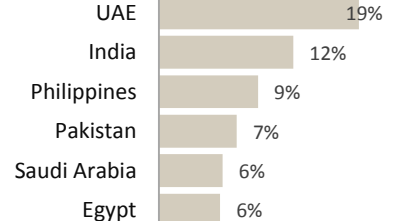
#### Deluxe



#### Superior



#### Standard





### AI Qattara Summer Exhibition

Jun 25 - Sep 25, 2018

Al Qattara Arts Centre, Al Ain, Al Ain

FREE ARTS



### Wings of Mexico

Sep 07 - Oct 31, 2018

Manarat Al Saadiyat, Saadiyat Island, Abu Dhabi

FREE CULTURE



### Community Critique SEAF 2017-2018 Cohort 5 Show

Sep 08 - Nov 04, 2018

Warehouse421, Abu Dhabi

FREE ARTS



### SPLASH @ Yas Marina

Sep 28 - Sep 29, 2018

Yas Marina, Yas Island, Abu Dhabi

TICKETED FAMILY



### AI Seef Mall Pop Up Market

Sep 20 - Sep 21, 2018

Al Seef Village Mall, Abu Dhabi

FREE FAMILY



### Elevator Repair Service

Sep 21 - Sep 24, 2018

The Arts Centre at NYU Abu Dhabi, Saadiyat Island, Abu Dhabi

FREE FAMILY



### AI Ain Book Fair 2018

Sep 23 - Oct 02, 2018

Al Ain Convention Centre, Al Ain

FREE CULTURE



### The Abu Dhabi International Hunting & Equestrian Exhibition

Sep 25 - Sep 29, 2018

ADNEC, Abu Dhabi

TICKETED CULTURE



### House of Illusion

Sep 19 - Sep 22, 2018

Yas Mall, Yas Island, Abu Dhabi

FREE LIFESTYLE

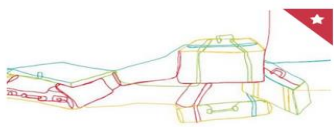


### Guggenheim Abu Dhabi: Talking Art Series

Sep 19, 2018

Manarat Al Saadiyat, Saadiyat Island, Abu Dhabi

FREE CULTURE



### Silent Book Exhibition

Sep 17 - Oct 18, 2018

Zayed Central Library, Al Ain, Abu Dhabi

FREE ARTS



### Middle East Games Con

Oct 25 - Oct 27, 2018

Abu Dhabi National Exhibition Centre, Abu Dhabi

TICKETED LIFESTYLE



### The International Jewellery & Watch Show

Oct 25 - Oct 29, 2018

Abu Dhabi National Exhibition Centre, Abu Dhabi

FREE BUSINESS



### Abu Dhabi International Boat Show

Oct 17 - Oct 20, 2018

ADNEC, Abu Dhabi

FREE BUSINESS

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



**DCT Abu Dhabi Concludes Two-City UK Roadshow:** DCT Abu Dhabi has concluded its annual roadshow to the UK, following successful events held at Abode Chester and The Bulgari Hotel in London. The roadshow, co-sponsored by Etihad Airways and Yas Experiences, gave 120 agents, tour operator reservation staff and product managers the opportunity to learn about the Middle East destination from 15 stakeholders.

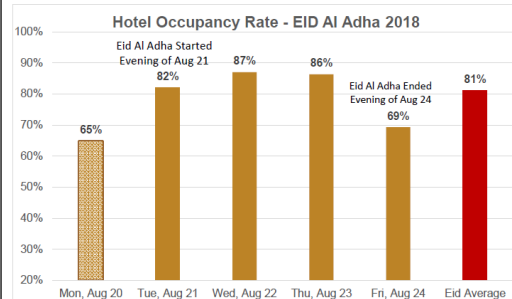


**Successful Fifth Edition of Abu Dhabi Summer Season Comes to a close:** The fifth edition of Abu Dhabi Summer Season (ADSS), which was held between Thursday 21st June and Saturday 1st September has come to a close. Reinforcing its growing success, the festival drew over 100,000 visitors from across the UAE and beyond to enjoy entertainment, hospitality, shopping and fun activities.



**The Department of Culture and Tourism – Abu Dhabi Hosts Tourism Delegation from Egypt :** As part of DCT Abu Dhabi’s mandate to promote the capital as a world-class destination of distinction, Abu Dhabi welcomed tour operators from the Egyptian Tourism Board from 3rd to 6th September, to highlight key tourism offerings in the emirate. The 14 Egyptian Tour operators along with other members of the Egyptian Tourism Board were treated to a tour of Abu Dhabi’s most impressive cultural and touristic sites as part of their trip, including Louvre Abu Dhabi and the recently opened Warner Bros World Abu Dhabi as well as many more sights. The trip included a networking session held on Tuesday, 4th September which commenced with a welcome note from Mubarak Al Nuaimi, Director of Promotions and Overseas Offices at DCT Abu Dhabi, followed by a presentation about Abu Dhabi as a destination and its product offerings. The day concluded with a networking session where top travel agents from Egypt had a chance to connect with local stakeholders in Abu Dhabi to share opportunities for exchange and collaboration.

**Abu Dhabi hotels records 81 percent hotel occupancy rate during Eid Al Adha Celebrations:** DCT Abu Dhabi has announced today that hotel occupancy rates in Abu Dhabi during Eid Al Adha 2018 averaged 81% across the four days from Tuesday, August 21st (the start of Eid) to Friday, August 24th. This represented an impressive 6 percent increase compared to the average occupancy figure of 75% during Eid Al Adha in 2017, further underlining the Emirate’s strong appeal as a destination of distinction for family leisure and entertainment



The highest occupancy rate (87%) was recorded on the second day of Eid. This exceptional holiday period saw a surge in visitors from both the UAE and further afield, with Emiratis, Saudis, Indians, British and Americans making up 55% of total visitors.



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:**

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