

HOTEL REPORT

MAY 2018





Dear partners,

I am pleased to share with you the Abu Dhabi hotels performance report for the first five months of 2018, and in so doing point to promising growth indicators and stable performance; welcome news to us all.

The number of hotel guests for this period has risen by 4.9% compared to last year with the average occupancy rate reaching 75% for the first five months of the year, with a 2.4% increase in average length-of-stay over the same time frame.

We have seen continuing robust metrics from most key markets, with a notable growth in guest arrivals from India, the United Kingdom, the United States and Germany.

China remains our biggest source market for overseas visitors, with more than 192,500 guests having arrived from the Asian country in the first five months of the year. Up until May, Chinese guest numbers have risen by 19.9% compared to 2017, but this percentage growth was exceeded by gains in our other key markets, including the United States (25.7% growth), India (22.2%) and Germany (20%). The United Kingdom also posted impressive gains of 12.7% for the first five months of the year.

All three regions of Abu Dhabi are in positive territory for guest arrivals for the first five months of the year, with the Al Dhafra Region seeing an 8.6% increase, Abu Dhabi up by 5.3% and Al Ain by around 1%.

To summarise, we see these headline year-to-date results as a positive sign for the second half of 2018. This is especially pleasing as we look to counter the drop in domestic tourism traffic we saw in April. We also expect a further boost from the recently approved cuts in tourism and municipal fees and the continuation of our promotional and marketing campaigns locally and internationally, in parallel with the current unique experiences and special offers provided during the Abu Dhabi Summer Season. We anticipate growth in tourist traffic to continue in response to the opening of additional leisure facilities and luxury resorts, and the impact of forthcoming annual marquee events, such as the Formula 1 Etihad Airways Abu Dhabi Grand Prix, Abu Dhabi Art and the Abu Dhabi Food Festival.

We look forward to continuing to see positive results as we seek to facilitate a climate that encourages investment and economic growth, and we will commit to working together with our partners to overcome other challenges, such as increasing average-length-of-stay and maintaining total hotel revenues.

Yours sincerely,

Saif Saeed Ghobash

Undersecretary, Department Culture and Tourism - Abu Dhabi

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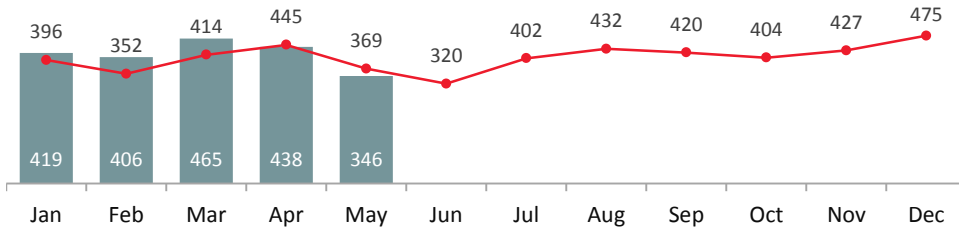
MAY 2018

OVERALL PERFORMANCE

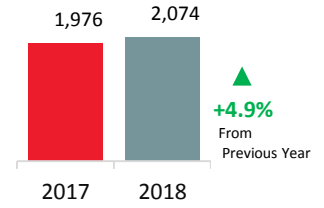
2017 2018

162 Hotels with 31,236 rooms

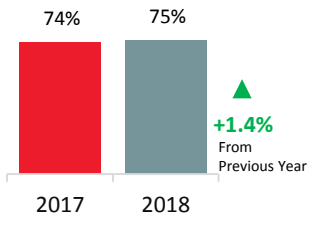
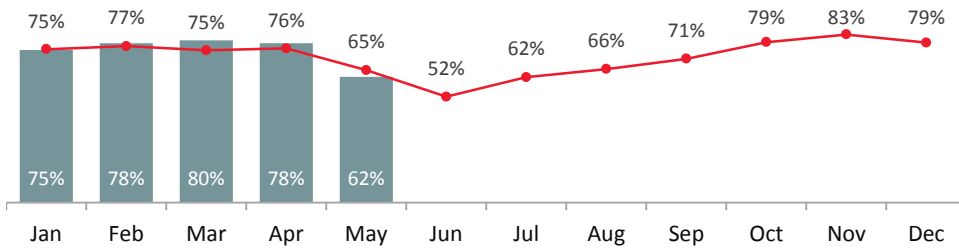
HOTEL GUESTS (000)



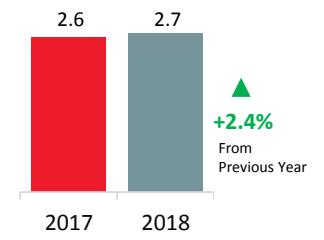
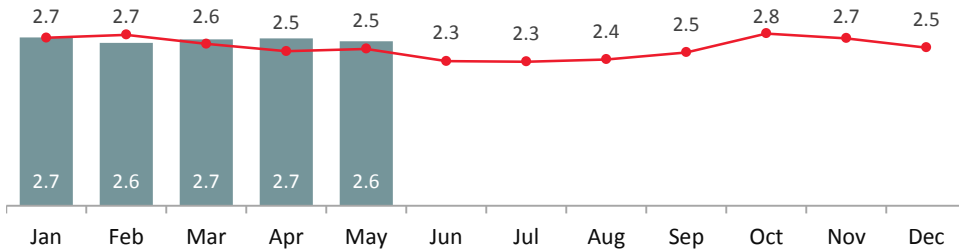
YTD (JAN- MAY)



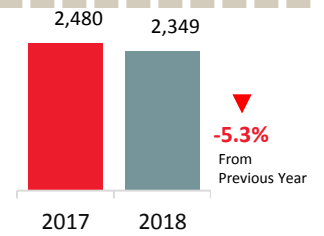
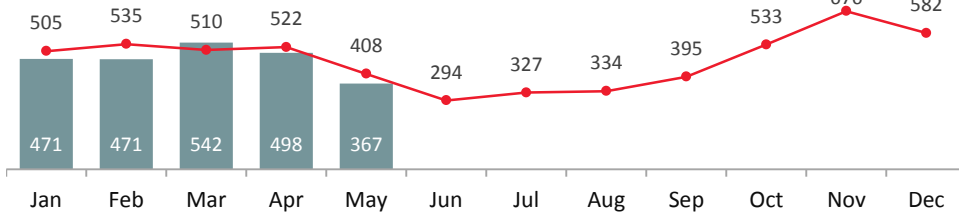
OCCUPANCY RATE



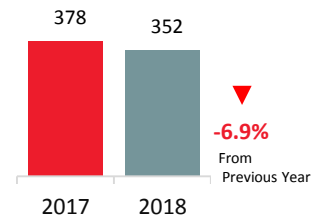
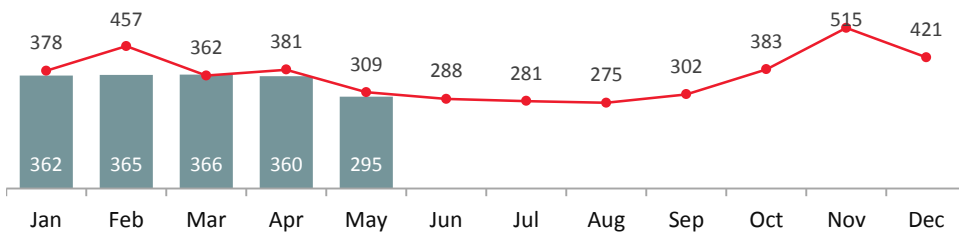
AVERAGE LENGTH OF STAY (ALOS-DAYS)



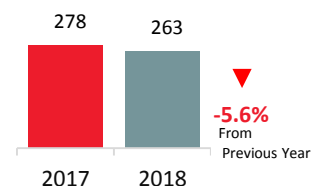
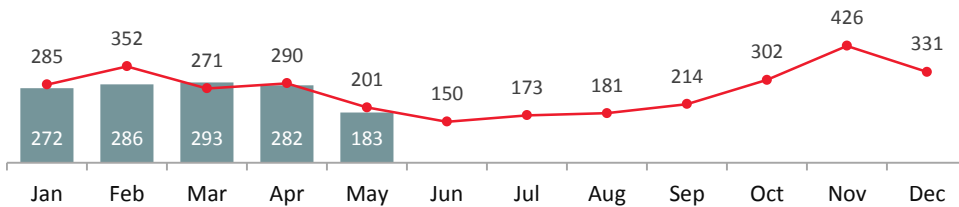
HOTEL TOTAL REVENUE (MILLION UAE)



AVERAGE ROOM RATE (UAE)



REVENUE PER AVAILABLE ROOM (UAE)



MAY 2018

HOTEL GUESTS

345,662

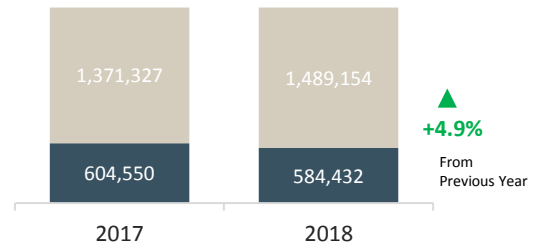
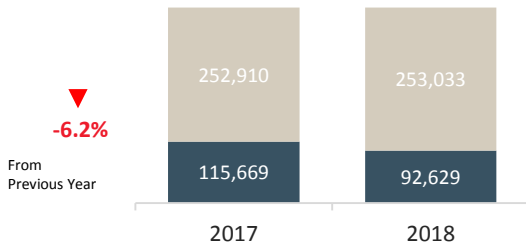
HOTEL GUESTS

■ UAE ■ Non UAE

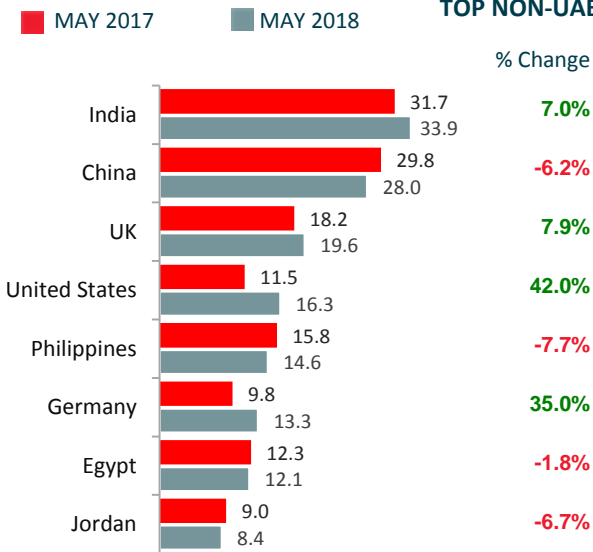
2,073,586

HOTEL GUESTS

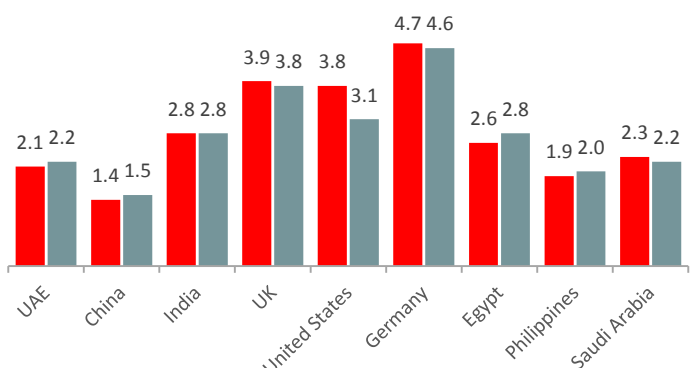
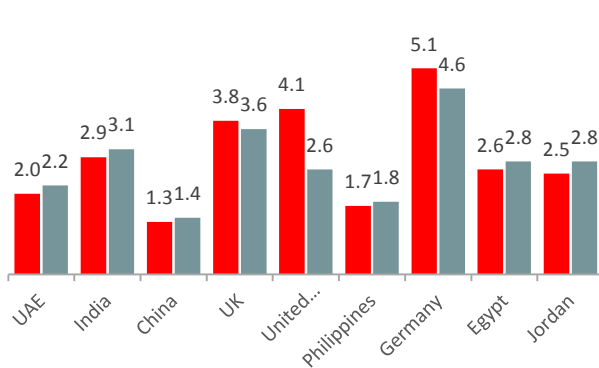
MAY 2018 YTD (JAN- MAY) 2018



TOP NON-UAE NATIONALITIES (000)

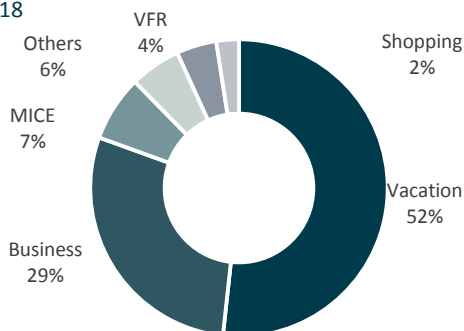


ALOS BY NATIONALITY (DAYS)

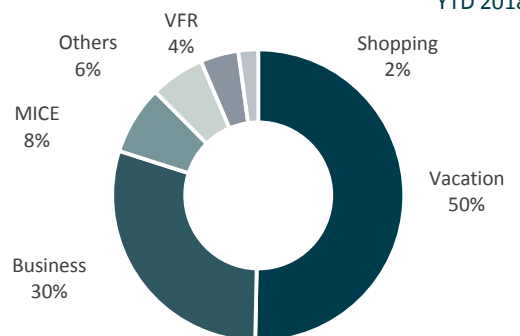


TRIP MAIN PURPOSE

MAY 2018

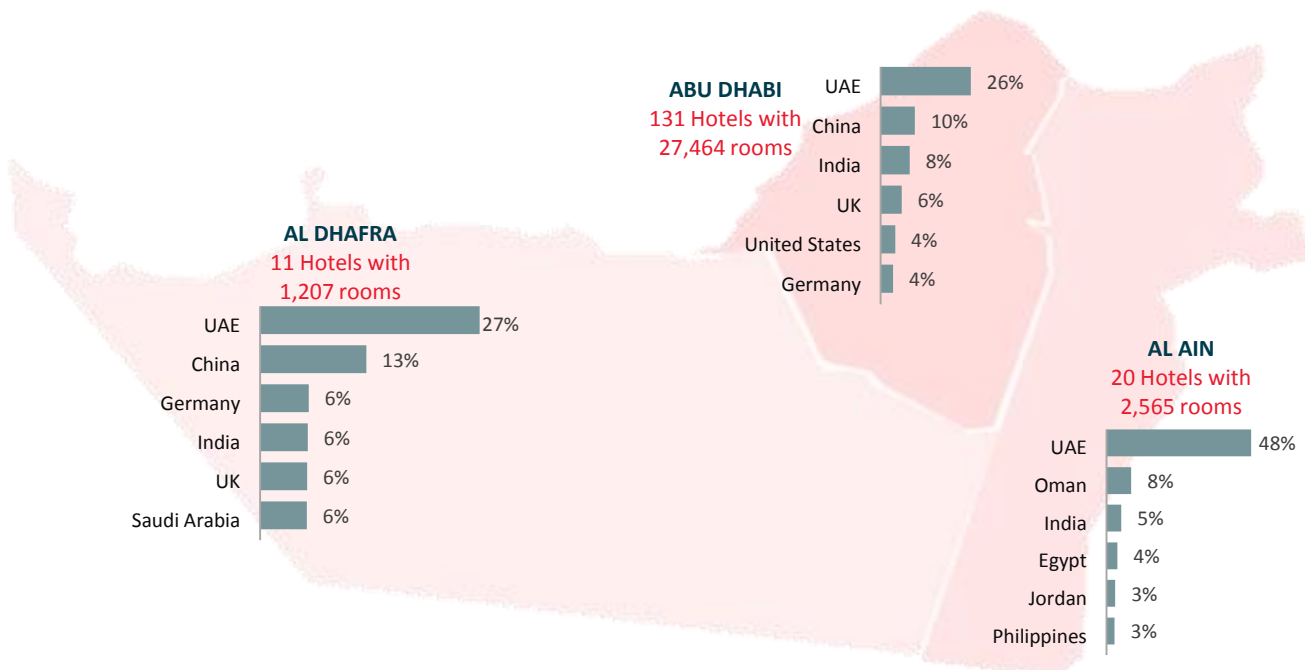


YTD 2018

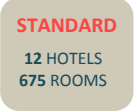
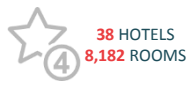


MAY 2018	ABU DHABI			AI AIN		AI DHAFRA			
	Actual	% Change vs Previous Year		Actual	% Change vs Previous Year	Actual	% Change vs Previous Year		
GUESTS	309,353	-5.7%	▼	27,396	-11.5%	▼	8,913	-7.2%	▼
OCCUPANCY RATE	65%	-4.9%	▼	45%	-11.9%	▼	36%	10.2%	▲
ALOS DAYS	2.7	5.2%	▲	2.0	-4.1%	▼	2.3	9.5%	▲
REVENUES (M AED)	336.6	-8.9%	▼	18.0	-28.7%	▼	12.1	-7.4%	▼
ARR (AED)	295	-3.4%	▼	247	-16.0%	▼	440	-17.3%	▼
REVPAR (AED)	190	-8.1%	▼	111	-25.9%	▼	158	-8.9%	▼

SUPPLY AND TOP NATIONALITIES - YTD 2018

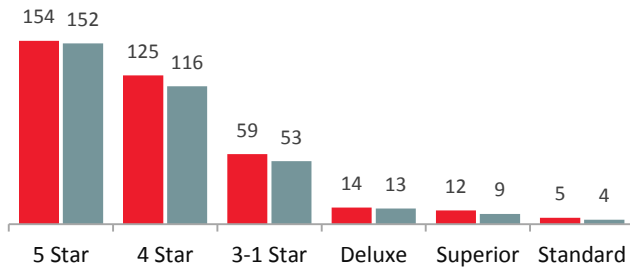


YTD (JAN- MAY)2018	ABU DHABI			AI AIN		AI DHAFRA			
	Actual	% Change vs Previous YTD		Actual	% Change vs Previous YTD	Actual	% Change vs Previous YTD		
GUESTS	1,833,348	5.3%	▲	176,767	0.6%	▲	63,471	8.6%	▲
OCCUPANCY RATE	77%	2.7%	▲	57%	-7.6%	▼	47%	-15.0%	▼
ALOS DAYS	2.7	3.0%	▲	2.0	1.5%	▲	2.1	-16.2%	▼
REVENUES (M AED)	2,123.7	-4.9%	▼	122.8	-14.5%	▼	102.8	-1.2%	▼
ARR (AED)	347	-7.1%	▼	289	-14.9%	▼	680	16.4%	▲
REVPAR (AED)	269	-4.6%	▼	166	-21.4%	▼	320	-1.0%	▼



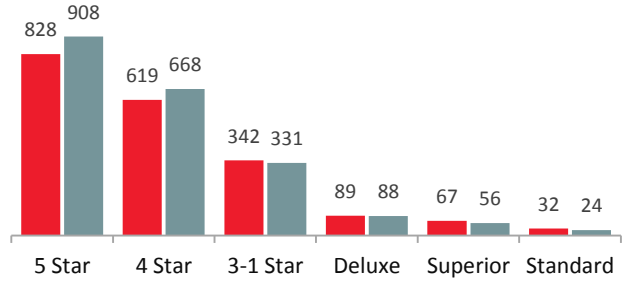
HOTEL GUESTS (000)

MAY 2017 (Red) MAY 2018 (Teal)

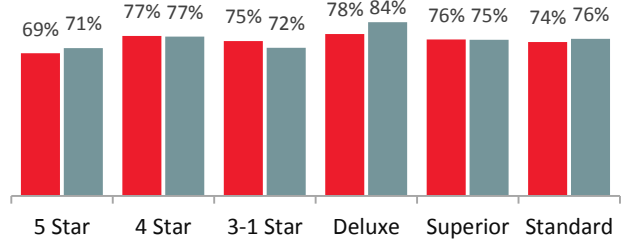
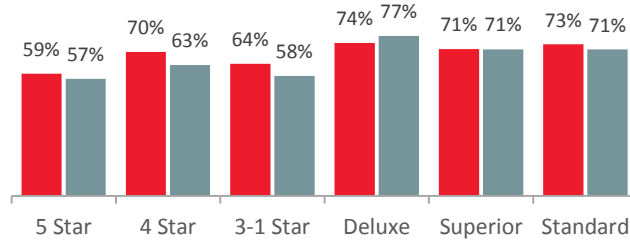


HOTEL GUESTS (000)

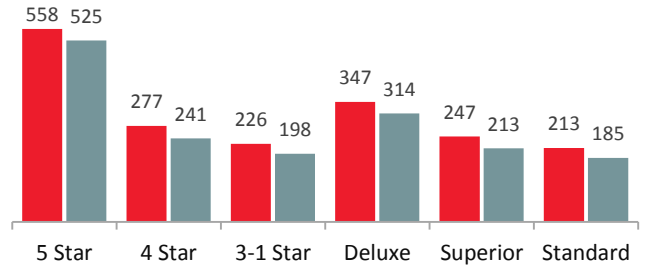
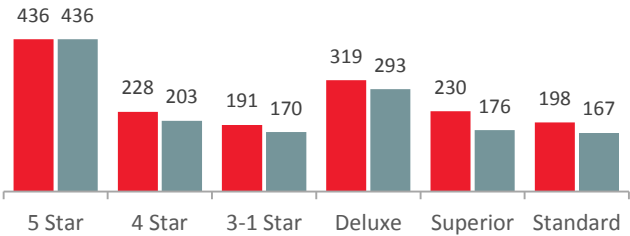
YTD 2017 (Red) YTD 2018 (Teal)



OCCUPANCY RATE (%)

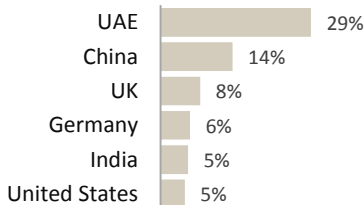


ARR (AED)

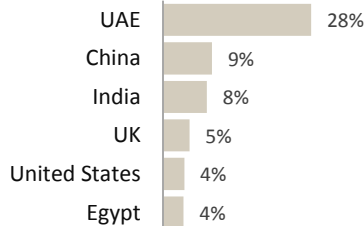


TOP NATIONALITIES YTD - 2018

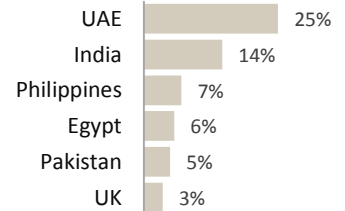
5 Star



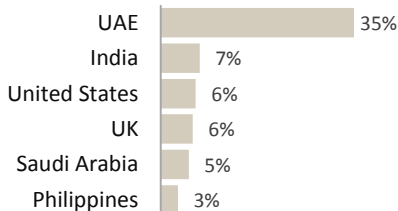
4 Star



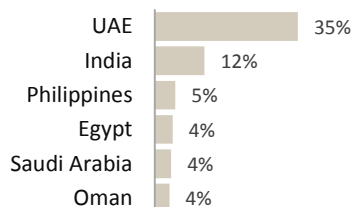
3-1 Star



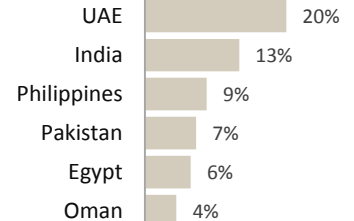
Deluxe



Superior



Standard



MAY 2018

UPCOMING EVENTS



JUNE 2018



100 Challenge Day

Feb 18 - Sep 09, 2018

Family Development Foundation HQ, Abu Dhabi

FREE SPORTS



Zayed: Story of a Nation

May 14 - Jun 28, 2018

Manarat Al Saadiyat, Abu Dhabi

FREE EDUCATION



Comedy show

Jun 20, 2018

Park Rotana Abu Dhabi, Abu Dhabi

TICKETED ARTS



Al Beit Beit Aboona

Jun 22 - Jun 23, 2018

Al Raha Beach Theatre, Abu Dhabi

TICKETED FAMILY



Pinkfong and Baby Shark

Jun 28 - Jun 30, 2018

Dalma Mall, Wahat Hill Mall

JULY/AUGUST 2018



UNITE With Tomorrowland

Jul 28 - Jul 28

Du Forum, Yas Island, Abu Dhabi



ALLDAY Live!

Jul 26 - Jul 28

Emirates Palace



Around the world

Jul 4 - Aug 13

Bawadi Mall - Main Atrium



Nickelodeon Experience

Aug 06 - Aug 15, 2018

Marina Mall, Abu Dhabi

TICKETED FAMILY

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

Abu Dhabi Golf Tourism Week: The Department in partnership with Abu Dhabi Sports Council (ADSC), and key golf stakeholders, recently concluded the first Abu Dhabi Golf Tourism Week event, which took place from the 29th April until 3rd May at key hotels and attractions across Abu Dhabi and Al Ain.

The five-day event welcomed current and prospective golf tour operators supported by significant media coverage from 15 countries across Europe and Asia to the UAE capital to showcase Abu Dhabi as a destination of distinction.



Ramadan Arcade: Manarat Al Saadiyat's Ramadan Arcade concluded this month after a successful run.

The event offered the public a variety of gaming and entertainment activities, film screenings, board game nights and creative installations.

Ramadan Arcade celebrated the essence of the Holy Month by bringing youth and families together to enjoy community gatherings. For its final day, visitors to Ramadan Arcade had the chance to take part in Ramadan-themed creative workshops in collaboration with Manarat Al Saadiyat's Art Studio



Department leads delegation to IMEX Frankfurt 2018: The Abu Dhabi Convention Bureau spearheaded the Abu Dhabi delegation participating at IMEX Frankfurt, the worldwide exhibition for incentive travel, meetings and events, which took place from 15-17 May in Frankfurt, Germany.

The delegation, led by the Abu Dhabi Convention Bureau, comprised of 16 products, with representatives from Abu Dhabi National Exhibition Centre (ADNEC), a selection of leading hotels and resorts, destination management companies, tour operators, and the emirate's national airline, Etihad Airways.

The award-winning trade show draws thousands of exhibitors and key decision-makers from around the world to Germany.

Fikra Labs Acceleration

Programme: The Fikra Labs Acceleration Programme, a new concept to drive innovation and foster entrepreneurship in the Abu Dhabi travel and tourism sector, concluded its four-week acceleration programme on May 1 with the announcement of the four winning MENA start-ups.



The winning start-ups that were awarded the coveted investment opportunity included Tapklik Technologies mentored by DCT Abu Dhabi, ViaFone Technologies mentored by ADNEC, Arabot mentored by Etihad Aviation Group and Scene mentored by Miral.

Since its launch in February, Fikra Labs has become a centre of innovation for partners and participants. The programme ended with sessions in which the finalists worked with the Wamda team and industry experts to finalise their prototypes.



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 room revenues by total available rooms in hotel minus out-of-service rooms

Disclaimer:

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