

HOTEL REPORT

FEBRUARY 2018



Dear friends,

As we continue through the first quarter of 2018, laying the foundations for what we hope will be another record-setting twelve months, I am pleased to share with you February's Hotel Establishments' Performance Report which, as you will immediately see, has surpassed our January figures.

This month, we can report a 15.2% increase in the number of hotel guests staying in Abu Dhabi compared with the same period in 2017, more than doubling our increases compared to January, which posted a 7.4% increase. In total, 405,849 hotel guests stayed in the emirates 161 hotels and hotel apartments. This represents an increase of more than 53,432 compared to February 2017.

The latest figures also show that the impressive February arrivals are down in no small part to a marked rise in guests from China, with a significant 83.6% increase. This performance in part reflects the positive impact of our targeted digital campaign in China. This campaign, which began in December 2017, has meant that we have seen a 50-fold increase in the traffic to the Chinese language version of our Visit Abu Dhabi website over the last three months, with *visitabudhabi.cn* receiving more than 2.5 million visits in that timeframe.

Visitor numbers were also in healthy territory for our other key markets, with the UK posting a 31% increase, India 29.1%, Germany 23.1%, and the United States a 16.2% growth.

Visitors from France were also prominent, at +27.2%, likely boosted by sustained interest in Louvre Abu Dhabi.

As we look at the three regions that make up our emirate, we can report that the metrics were in positive territory; Abu Dhabi up by 16.3%, Al Ain Region up by 2.4% and Al Dhafra Region up by an impressive 20.4%.

However, as a continuing note of caution, Occupancy Rates fell in February in both Al Ain (by more than 11%) and Al Dhafra (by 13%), with only Abu Dhabi posting an increase (3.2%). The Average Length of Stay declined in all three regions as well, in Abu Dhabi by 4.4%, by 2.8% in Al Ain, and by 22.4% in Al Dhafra.

As we go into March, and seek to maintain the momentum, we expect local events such as the popular Mother of the Nation Festival, as well as overseas promotional tours to China, India, Oman and Kuwait and further high-profile initiatives in Russia and Germany, to have a further positive impact on figures.

As ever, we look forward to keeping you updated over the coming months.

Yours sincerely,

Saif Saeed Ghobash
Director General, Department of Culture & Tourism

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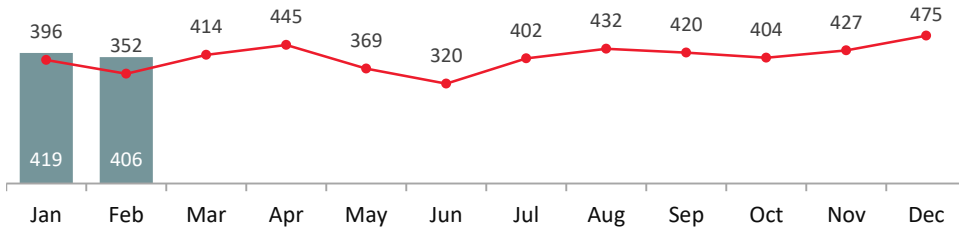
FEBRUARY 2018

OVERALL PERFORMANCE

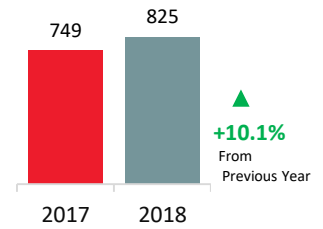
2017 2018

161 Hotels with 30,809 rooms

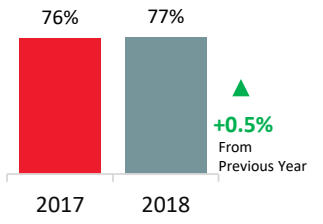
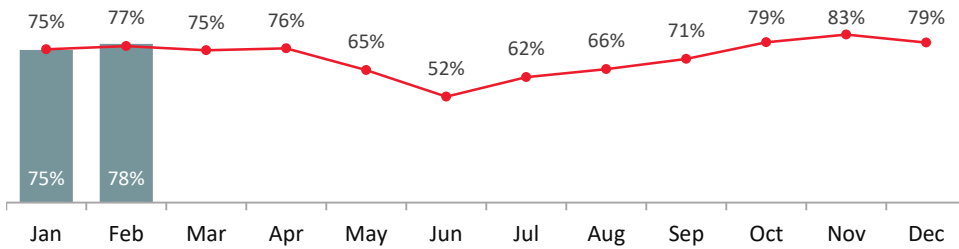
HOTEL GUESTS (000)



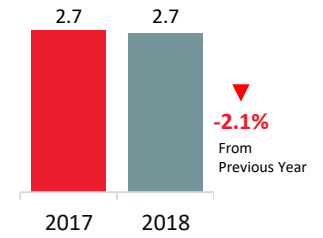
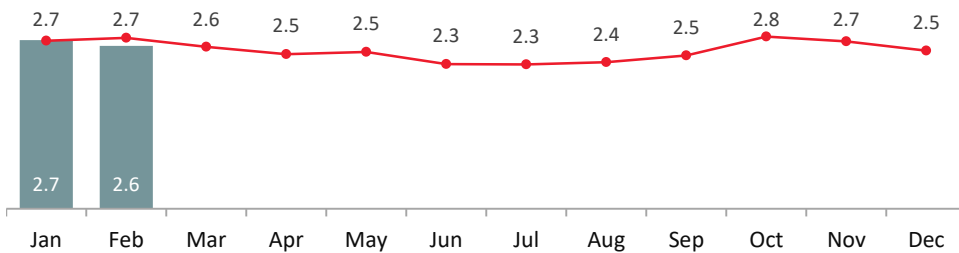
YTD (JAN- FEB)



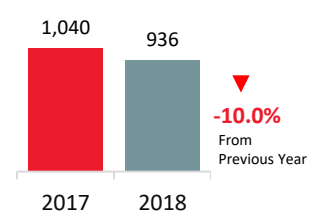
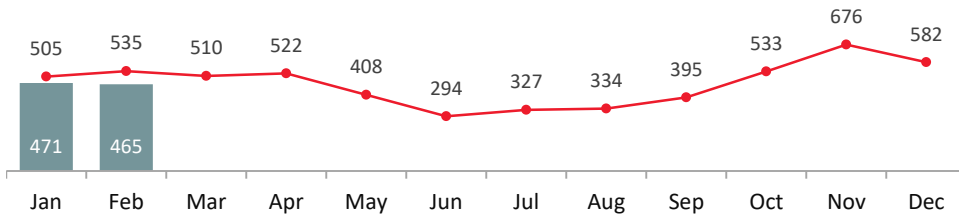
OCCUPANCY RATE



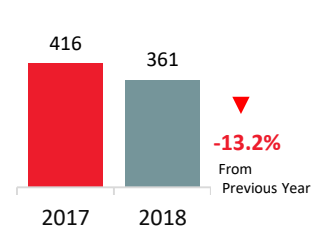
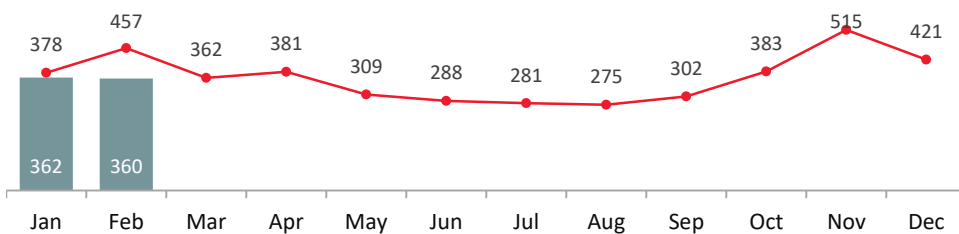
AVERAGE LENGTH OF STAY (ALOS-DAYS)



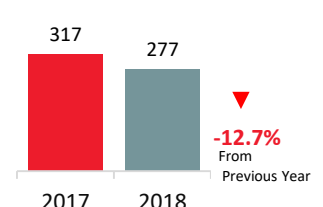
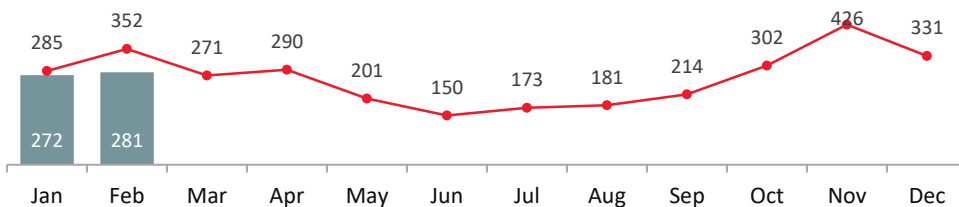
HOTEL TOTAL REVENUE (MILLION UAE)



AVERAGE ROOM RATE (UAE)



REVENUE PER AVAILABLE ROOM (UAE)



FEBRUARY 2018

HOTEL GUESTS



405,849

■ UAE ■ Non UAE

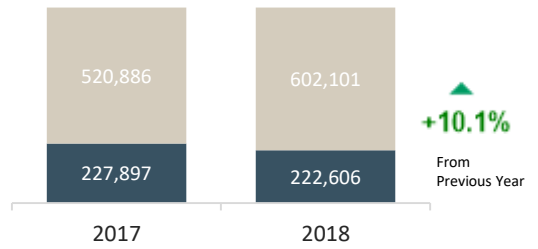
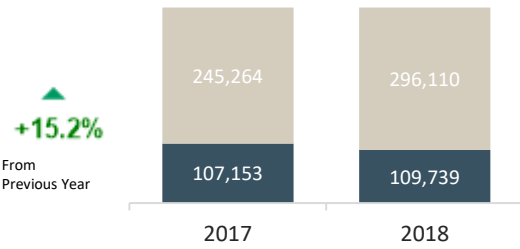
824,707

HOTEL GUESTS

FEBRUARY 2018

YTD (JAN- FEB) 2018

HOTEL GUESTS



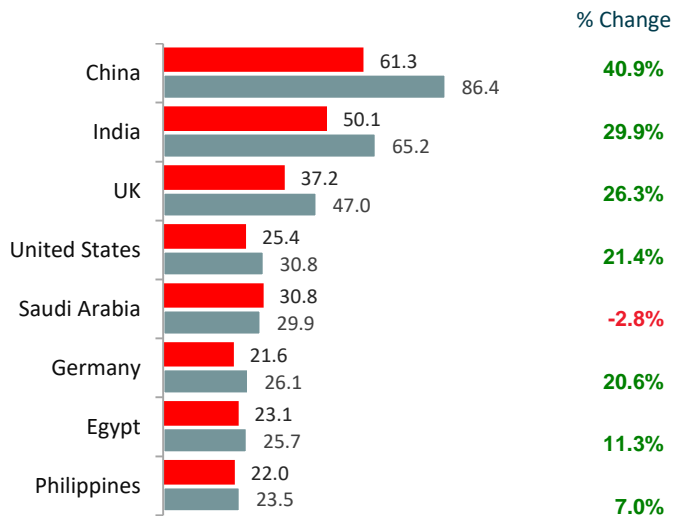
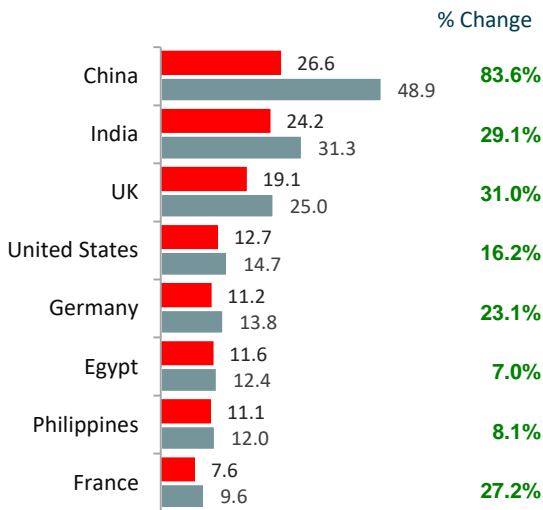
■ FEB 2017

■ FEB 2018

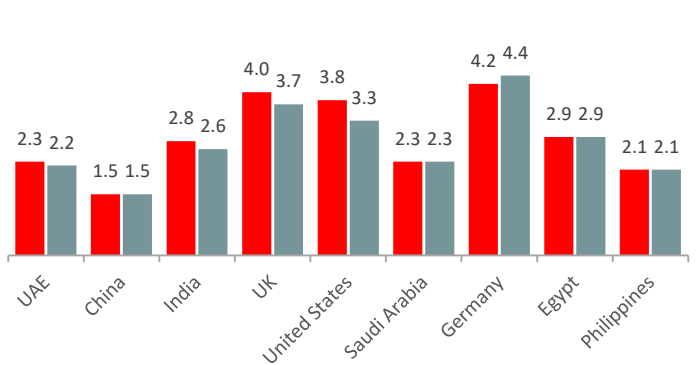
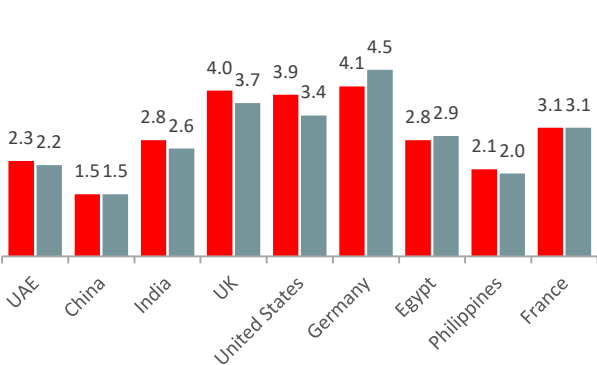
TOP NON-UAE NATIONALITIES (000)

■ YTD 2017

■ YTD 2018



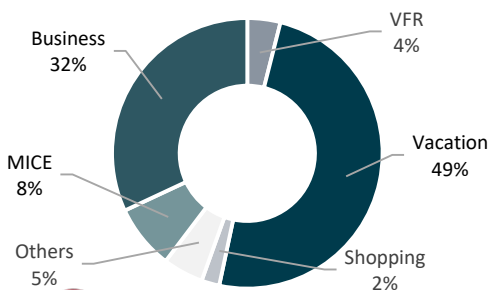
ALOS BY NATIONALITY (DAYS)



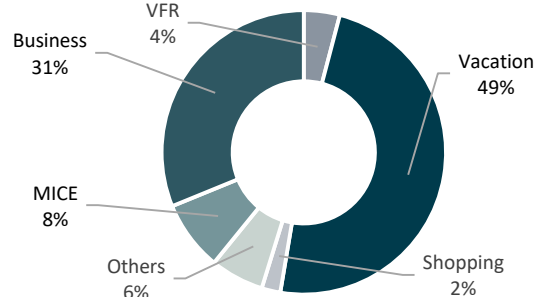
TRIP MAIN PURPOSE

■ Vacations ■ Business ■ MICE ■ VFR ■ Shopping ■ Others

FEB 2018



YTD 2018

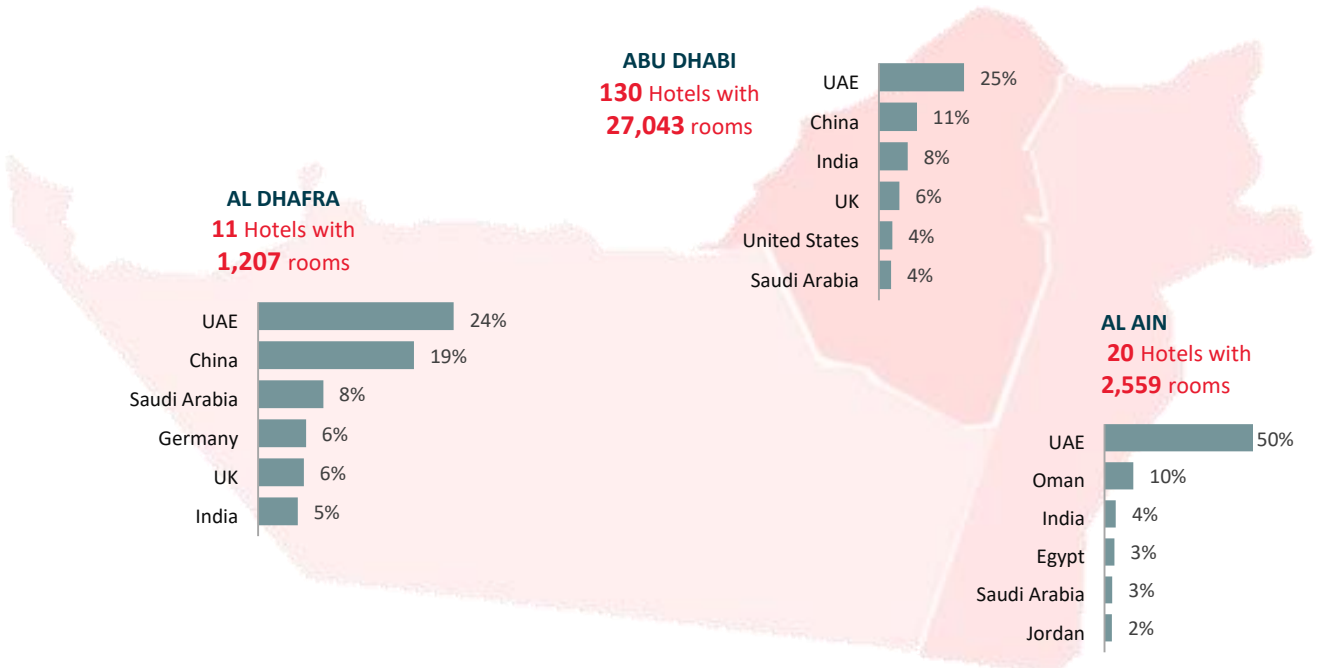


FEBRUARY 2018

PERFORMANCE BY REGION

FEBRUARY 2018	ABU DHABI			AI AIN			AI DHAFRA		
	Actual	% Change vs Previous Year		Actual	% Change vs Previous Year		Actual	% Change vs Previous Year	
GUESTS	358,382	16.3%	▲	33,458	2.4%	▲	14,009	20.4%	▲
OCCUPANCY RATE	81%	3.2%	▲	61%	-11.7%	▼	53%	-13.0%	▼
ALOS DAYS	2.7	-4.4%	▼	2.1	-2.8%	▼	2.0	-22.4%	▼
REVENUES (M AED)	417.5	-13.9%	▼	24.0	-15.4%	▼	23.5	7.3%	▲
ARR (AED)	354	-23.0%	▼	286	-18.9%	▼	779	30.5%	▲
REVPAR (AED)	286	-20.6%	▼	175	-28.4%	▼	412	13.5%	▲

SUPPLY AND TOP NATIONALITIES - YTD 2018



YTD (JAN- FEB) 2018	ABU DHABI			AI AIN			AI DHAFRA		
	Actual	% Change vs Previous YTD		Actual	% Change vs Previous YTD		Actual	% Change vs Previous YTD	
GUESTS	727,925	10.4%	▲	70,846	4.8%	▲	25,936	18.9%	▲
OCCUPANCY RATE	79%	2.6%	▲	60%	-11.4%	▼	47%	-29.7%	▼
ALOS DAYS	2.7	-1.1%	▼	2.0	-2.8%	▼	2.0	-32.1%	▼
REVENUES (M AED)	844.8	-10.2%	▼	49.6	-13.9%	▼	42.0	1.5%	▲
ARR (AED)	356	-14.6%	▼	294	-16.1%	▼	763	50.3%	▲
REVPAR (AED)	282	-12.4%	▼	177	-25.7%	▼	357	5.7%	▲



45 HOTELS
12,723 ROOMS



37 HOTELS
7,662 ROOMS



33 HOTELS
4,649 ROOMS

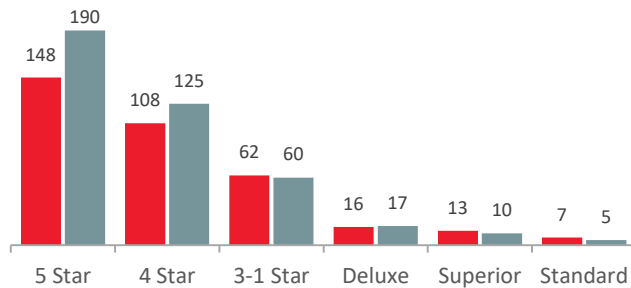
DELUXE
18 HOTELS
3,255 ROOMS

SUPERIOR
16 HOTELS
1,809 ROOMS

STANDARD
12 HOTELS
711 ROOMS

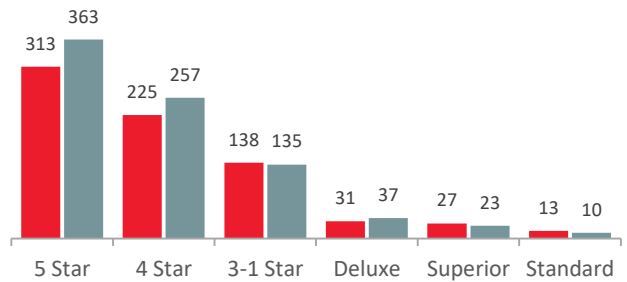
HOTEL GUESTS (000)

FEB 2017 FEB 2018

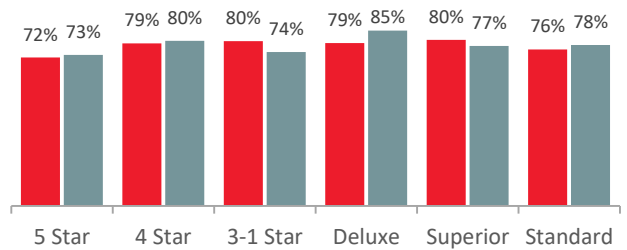
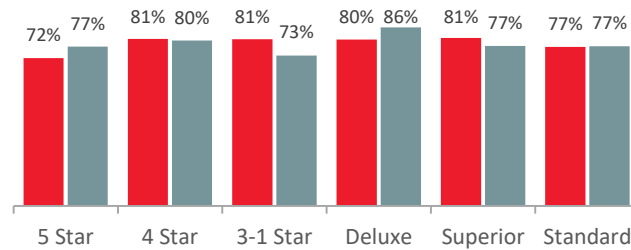


HOTEL GUESTS (000)

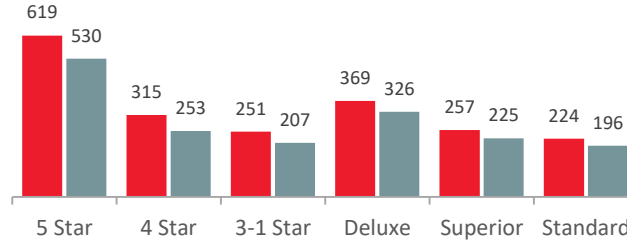
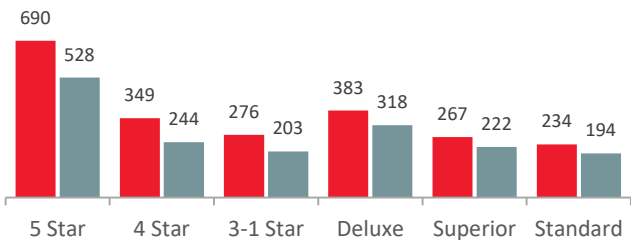
YTD 2017 YTD 2018



OCCUPANCY RATE (%)

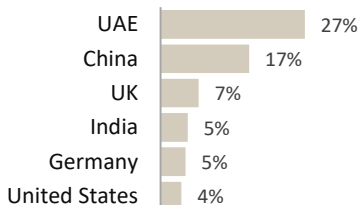


ARR (AED)

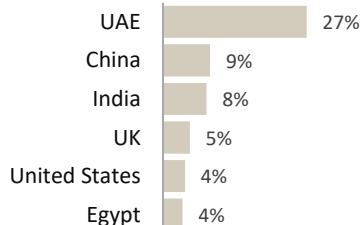


TOP NATIONALITIES YTD - 2018

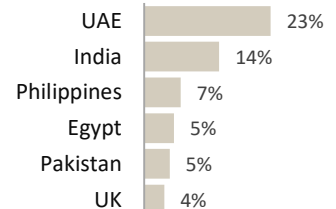
5 Star



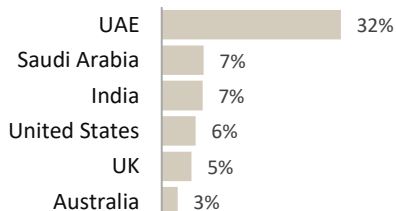
4 Star



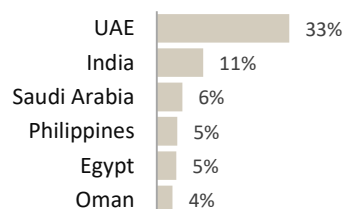
3-1 Star



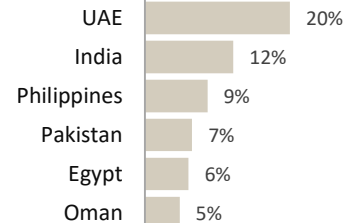
Deluxe



Superior



Standard



FEBRUARY 2018

UPCOMING EVENTS



APRIL 2018

CultureSummit 2018 Abu Dhabi
 Apr 8, 2018 | Manarat Al Saadiyat
 TICKETED

Abu Dhabi Pet Festival 2018
 Apr 13, 2018 | du Arena
 TICKETED

du Live! Presents PAW PATROL LIVE!
 Apr 13 - Apr 14, 2018 | du Forum
 TICKETED

EmiratesSkills National Competition 2018
 Apr 16 - Apr 18, 2018
 Abu Dhabi National Exhibition Centre
 FREE

Honoring the winners of Khalifa Educational ceremony - 11th 2018-session 2017
 Apr 16, 2018 | Emirates Palace
 FREE

Abu Dhabi World Professional Jiu-Jitsu Championship 2018
 Apr 16 - Apr 28, 2018
 Mubadala Arena, Zayed Sports City
 FREE

MAY 2018

Al Ain Cultural Programme 2017-2018
 Oct 14, 2017 - May 31, 2018
 Al Ain Oasis, Al Ain Palace Museum, Qasr Al Muwaiji, Al Jahili Fort, Al Qattara Arts Centre, Qasr Al Muwaiji
 FREE

Caribbean Reggae Beach Festival
 May 4, 2018 | Yas Beach
 FREE

Decked Out Weekends
 Mar 2 - May 12, 2018 | Yas Marina
 FREE

Lines and Stitches
 Mar 15 - Jun 14, 2018 | Al Qattara Arts Centre
 FREE

Messages of Benevolence
 Mar 15 - May 15, 2018 | Zayed Central Library
 FREE

Love and Revenge
 May 2 - May 3, 2018
 Auditorium Plaza, Louvre Abu Dhabi
 FREE

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

Mother of the Nation Festival: The Mother of the Nation Festival, regarded as one of the UAE's largest cultural events of its kind, is to return to the capital between 22nd - 31st March.

The third edition of the festival will once again be held on Abu Dhabi Corniche and will be open daily from 4pm until midnight. Last year's edition attracted more than 197,000 visitors over its 10 day-run.

The Festival is dedicated to H.H. Sheikha Fatima bint Mubarak, Supreme Chairwoman of the Family Development Foundation, Chairwoman of the General Women's Union, and Chairwoman of the Supreme Council of Motherhood and Childhood, and is a tribute to her inspirational values while celebrating her vision and tireless contributions to society.



Culture App: DCT Abu Dhabi has successfully launched a new digital initiative which acts as a 'one-stop' reference point for all information relating to culture in the Emirate.

The initiative, launched as part of UAE Innovation Month, is called 'Abu Dhabi Culture' and allows users to gain instant access to information on all aspects of cultural life and heritage in the Emirate. 'Abu Dhabi Culture' features a website, a mobile app and supporting social media presence, which will educate culture-seeking locals, expats and tourists and becoming a reference point for researchers.



CultureSummit: The second annual CultureSummit Abu Dhabi will convene an audience of leaders from every corner of the world to discuss the power of culture to drive positive social change, covering topics as wide-ranging as education to saving the climate, to combating extremism.

The Summit's Steering Committee, chaired by HE Noura Al Kaabi, Minister of Culture and Knowledge Development for the UAE, announced the forum would take place from April 8th until 12th, at Manarat Al Saadiyat.

The CultureSummit in 2017 convened more than 450 participants from 80 countries to discuss cultural diplomacy as a catalyst for change for the digital age.

Closer Ties: The Department has signed a Memorandum of Understanding with Paris Sorbonne University Abu Dhabi (PSUAD) to cooperate on the exchange of expert knowledge and skills in the areas of Archaeology, Heritage Studies and Museum Studies for the next three years.

The agreement means the two entities will work together on several fronts with the ultimate aim being to boost the tourism and cultural sectors in Abu Dhabi as well as promoting Emiratisation.

The MoU will see DCT Abu Dhabi and PSUAD co-ordinate the sharing of knowledge and expertise in a variety of areas, and to help identify and nurture any potential young talent in the cultural field. Under the agreement, initiatives will include arranging and funding workshops for PSUAD students on Archaeology, Heritage Studies and Museum Studies as well as Art Management.



FEBRUARY 2018

GLOSSARY



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

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