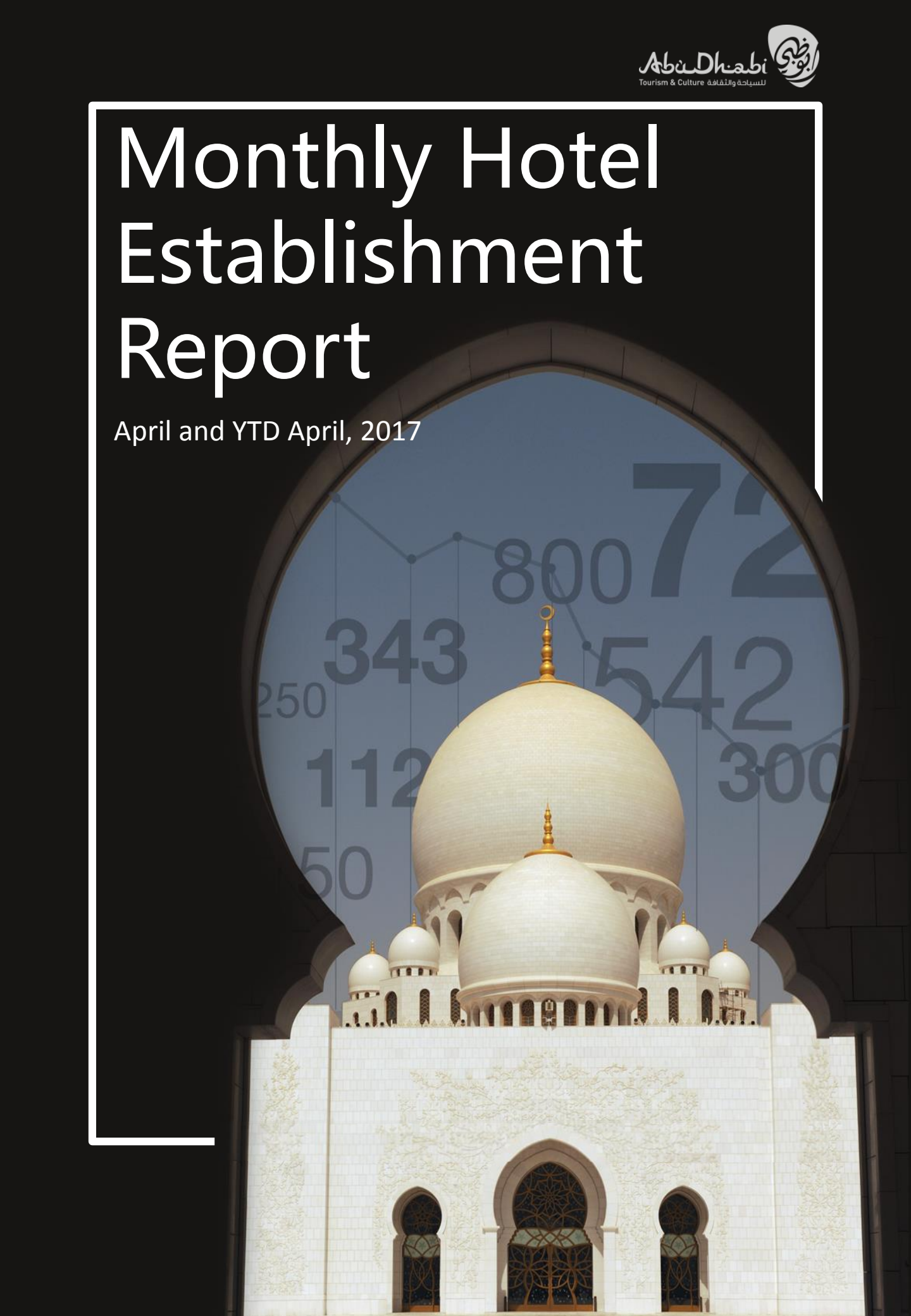
Monthly Hotel Establishment Report

April and YTD April, 2017



31 May, 2017

Dear Hotel Partner,

As part of our commitment to provide a consistent shared view of performance, it gives me great pleasure to share with you highlights from the monthly Hotel Establishments' Performance Report for the month of April

April has continued to build on the strong performance of the opening quarter of the year, posting a year-on-year increase of 15% in hotel guest arrivals Each of our six international tier-one markets of China, India, UK, USA, Germany and Saudi Arabia showed growth, in addition to which some 130,000 domestic arrivals accounted for approximately 30% of the monthly total. Each of the emirate's three districts - Abu Dhabi, Al Ain Region and Al Dhafra Region - experienced an upturn in guest arrivals.

This is a strong showing; with the emirate having welcomed 1.6 million guest arrivals since January, and year-to-date growth is currently at 7%, although pressures remain on occupancy, length of stay and RevPAR, which we will continue to address with your ongoing support and commitment to our promotional activities.

Our efforts in April included a variety of activities in line with the breadth of our remit. On the tourism front, we led a travel trade delegation to Arabian Travel Market announcing innovative tourism product development initiatives, and pressing home our 'Your Extraordinary Story' destination campaign. We also coordinated a promotional drive in the Kingdom of Saudi Arabia, with representation at Riyadh Travel Fair followed by a promotional tour across the Kingdom to boost inbound visitor numbers.

During April, we also hosted important conferences and events. The inaugural *Culture Summit2017*, convened 300 participants from more than 80 countries, including influential figures in the fields of government, heritage preservation, arts, philanthropy, education, media, science and technology. Also, the annual Abu Dhabi International Book Fair attracted over 300,000 visitors catering to keen readers of poetry, literature, and culture.

Our efforts to stimulate interest in the destination continue unabated as we head into a period of reflection for the holy month of Ramadan. Visitors will be enthralled by a two-week cultural celebration of the holy month with an Emirati essence at the *Manarat Al Saadiyat Ramadan Evenings* which open daily from 4 – 17 June, and our overseas offices continue to stimulate destination awareness though a series of innovative travel trade and consumer initiatives.

Once again, I thank you for your efforts in supporting these initiatives, and contributing to the growth seen during this period, and look forward to sharing further positive results next month.

For more details of the April data, I kindly refer you to our website:
http://tcaabudhabi.ae/en/who.we.are/reports.statistics.aspx

Yours sincerely,

Saif Saeed Ghobash

Director General, Abu Dhabi Tourism & Culture Authority

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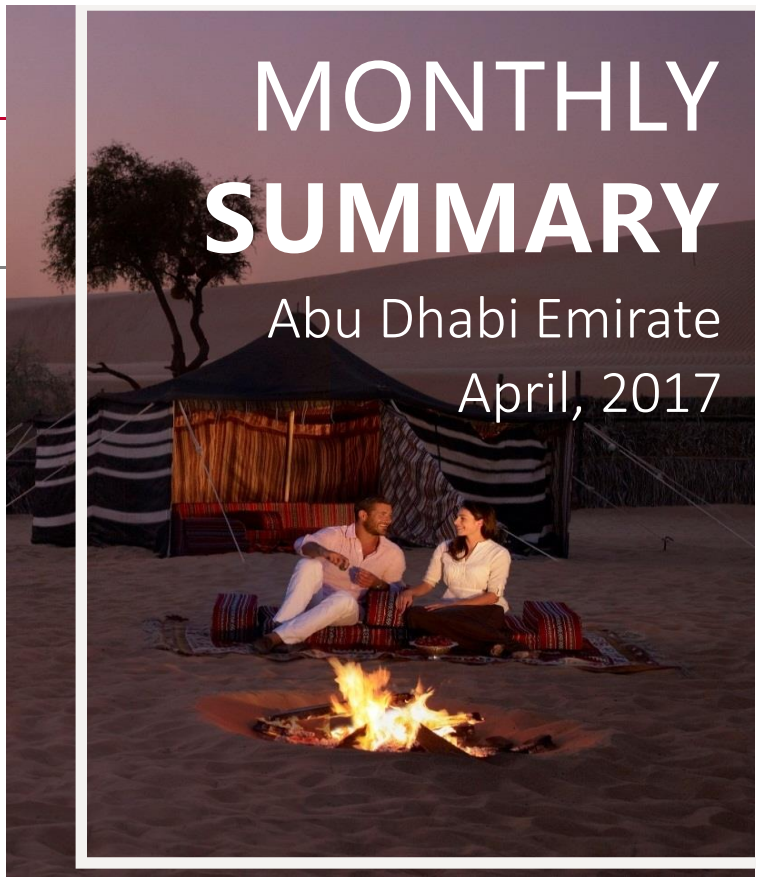
MONTHLY SUMMARY

Abu Dhabi Emirate

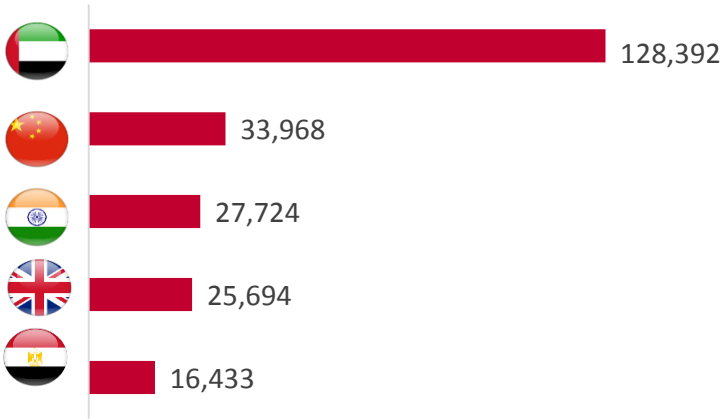
April, 2017



ABU DHABI HOTEL GUESTS

Hotel Guests ***436,832*** ▲ **15%** vs April 2016

Top 5 Nationalities
(Hotel Guests)



HOSPITALITY SECTOR PERFORMANCE

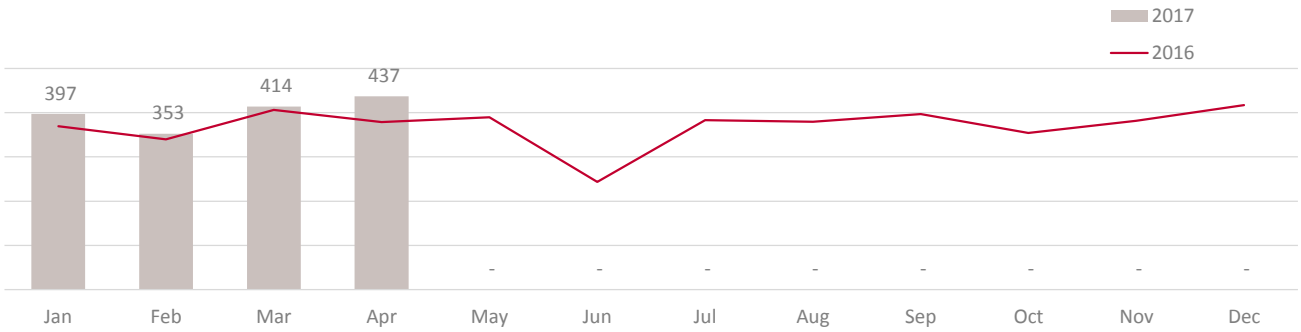
Occupancy rate	***76%***	▼ **-2%**
Average length of stay	***2.5*** **nights**	▼ **-8%**
Revenue per available room	***287*** **AED**	▼ **-11%**
Hotel revenues	***520*** **M AED**	▼ **-7%**

UPCOMING EVENTS

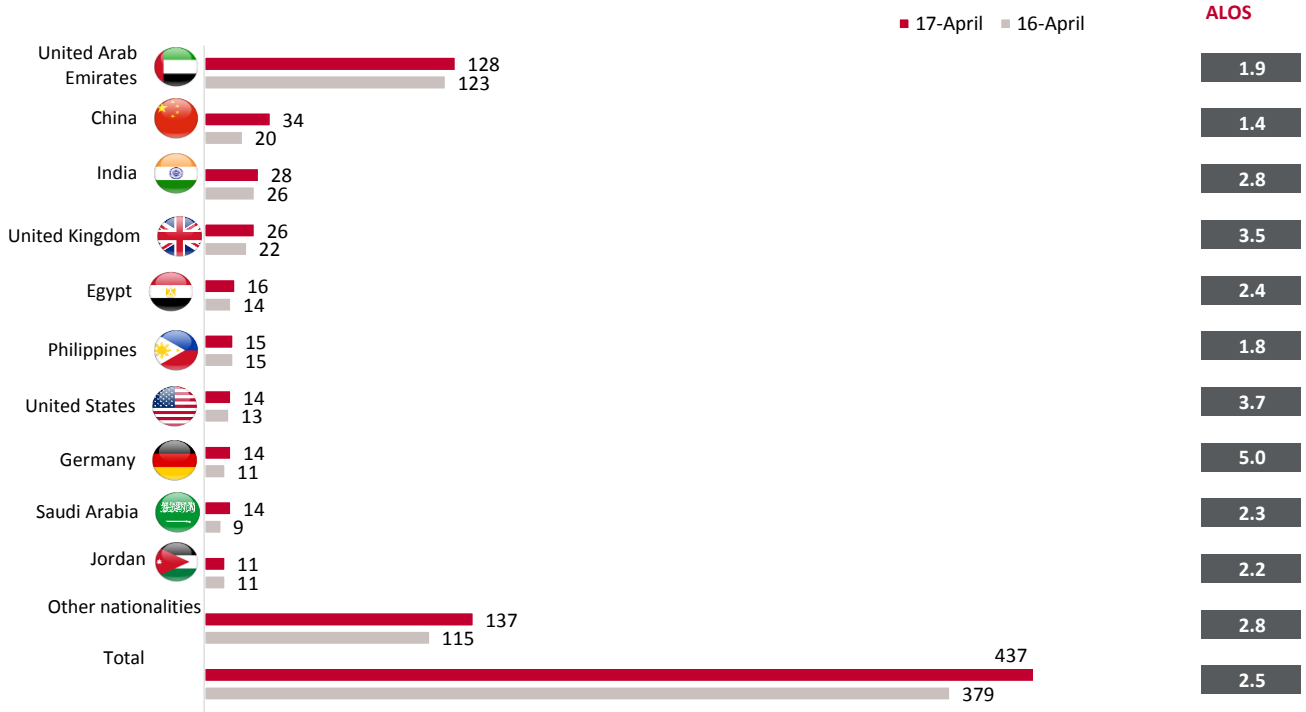
Qasr Al Hosn Exhibition	Mar 03 to Dec 31, 2017	Abu Dhabi
Al Ain Cultural Art Programme	Jun 26 to Dec 31, 2017	Al Ain
Abu Dhabi Awards 2017	Apr 16 to Jun 2, 2017	Abu Dhabi

For description of the variables, please visit the glossary

HOTEL GUESTS (thousands)



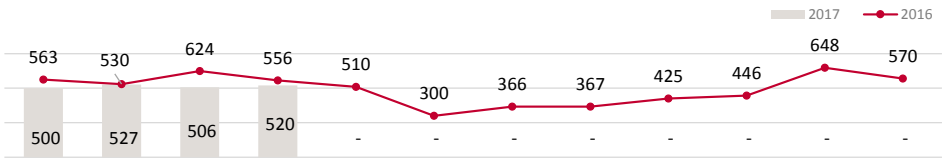
HOTEL GUESTS BY NATIONALITY (thousands)



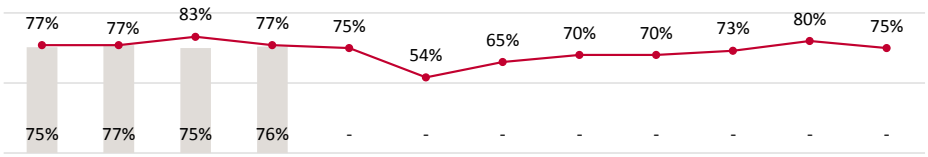
For description of the variables, please visit the glossary

KEY INDICATORS

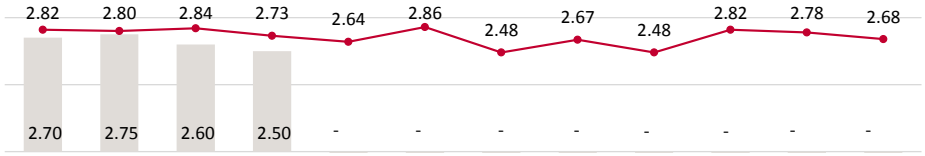
Revenues, M AED



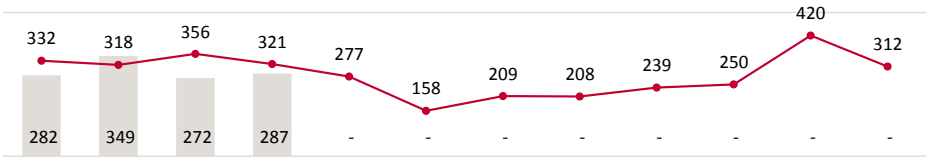
Occupancy, %



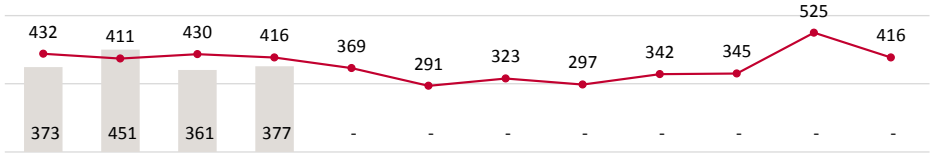
ALOS, days



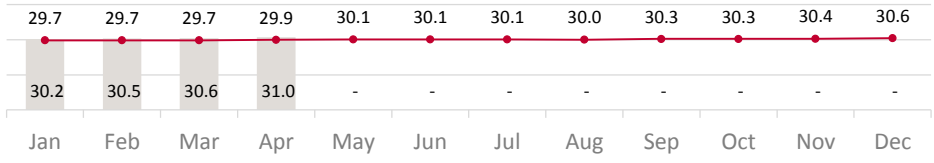
RevPAR, AED



ARR, AED



Av. rooms, thousands



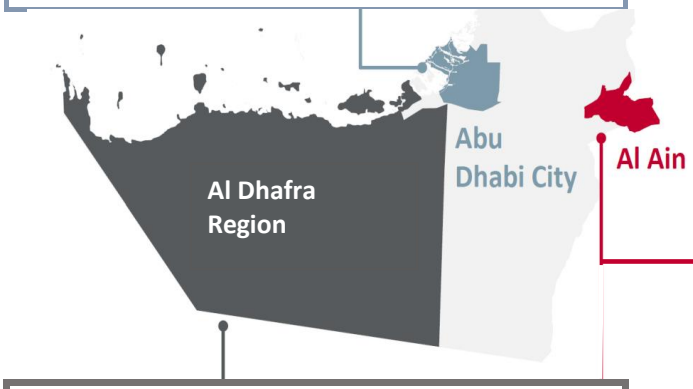
For description of the variables, please visit the glossary

HOSPITALITY SECTOR PERFORMANCE

KEY INDICATORS BY REGION

Compared to Apr 2016

Actual Guest	383,049	16% ▲
Guest nights	993,243	7% ▲
ALOS, days	2.59	-8% ▼
Occupancy, %	79%	0% ▲
Total revenues, M AED	464	-6% ▼
ARR, AED	368	-9% ▼
RevPAR, AED	289	-9% ▼



Actual Guest	39,082	5% ▲
Guest nights	67,336	-7% ▼
ALOS, days	1.72	-11% ▼
Occupancy, %	60%	-12% ▼
Total revenues, M AED	30	-7% ▼
ARR, AED	349	-12% ▼
RevPAR, AED	208	-22% ▼

Actual Guest	14,701	30% ▲
Guest nights	30,453	-9% ▼
ALOS, days	2.07	-31% ▼
Occupancy, %	50%	-28% ▼
Total revenues, M AED	25	-11% ▼
ARR, AED	783	5% ▲
RevPAR, AED	392	-24% ▼

For description of the variables, please visit the glossary

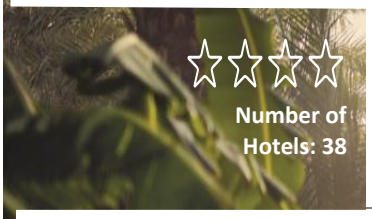
HOSPITALITY

SECTOR PERFORMANCE

KEY INDICATORS PER HOTEL TYPE

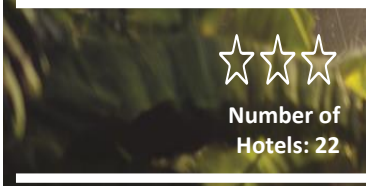
Number of Hotels: 45

Total room capacity	12,508
Occupancy	73%
ALOS	2.52 days
RevPAR	419 AED
Top 5 Nationalities	



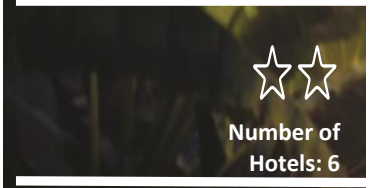
Number of Hotels: 38

Total room capacity	7,502
Occupancy	81%
ALOS	1.82 days
RevPAR	210 AED
Top 5 Nationalities	



Number of Hotels: 22

Total room capacity	3,958
Occupancy	72%
ALOS	2.23 days
RevPAR	155 AED
Top 5 Nationalities	



Number of Hotels: 6

Total room capacity	534
Occupancy	85%
ALOS	2.27 days
RevPAR	145 AED
Top 5 Nationalities	

Number of Hotels: 6

Total room capacity	423
Occupancy	78%
ALOS	1.45 days
RevPAR	147 AED
Top 5 Nationalities	

DELUXE

Number of Hotel Apartments: 20

Total room capacity	3,281
Occupancy	81%
ALOS	5.50 days
RevPAR	256 AED
Top 5 Nationalities	

SUPERIOR

Number of Hotel Apartments: 19

Total room capacity	2,073
Occupancy	75%
ALOS	4.59 days
RevPAR	178 AED
Top 5 Nationalities	

STANDARD

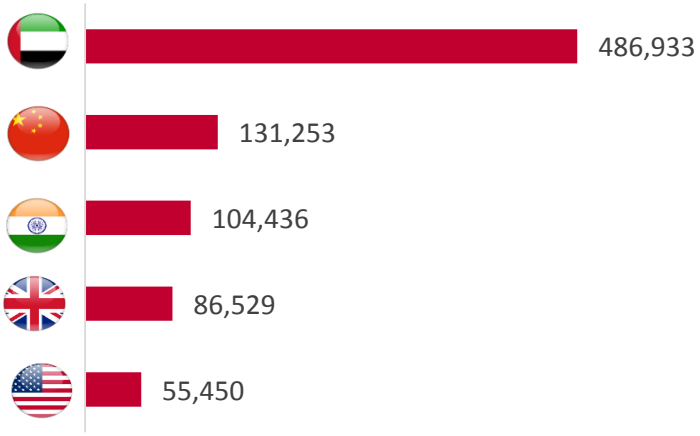
Number of Hotel Apartments: 13

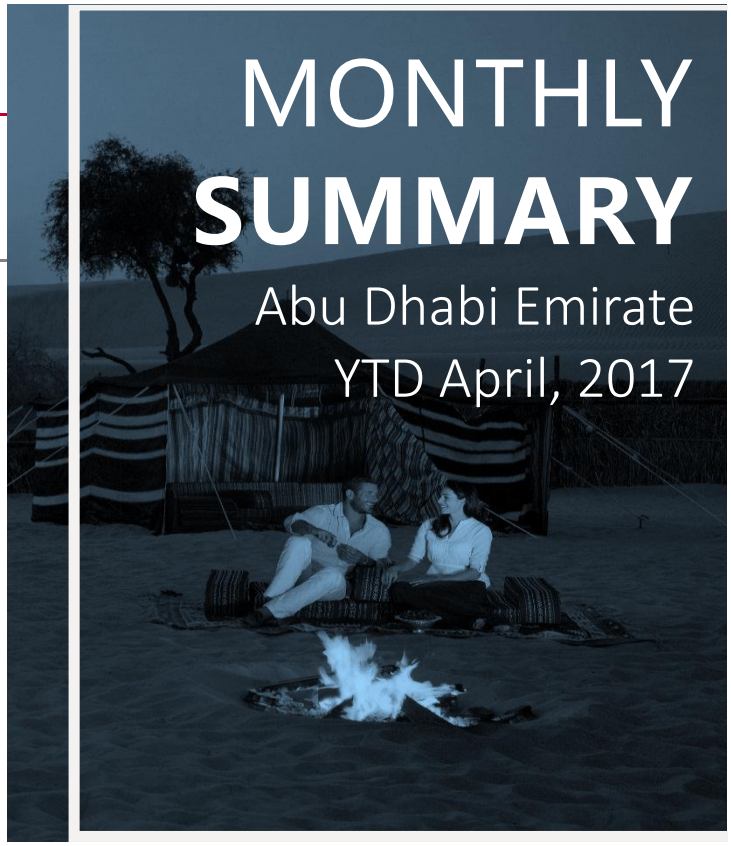
Total room capacity	733
Occupancy	74%
ALOS	3.77 days
RevPAR	156 AED
Top 5 Nationalities	

ABU DHABI HOTEL GUESTS

Hotel Guests	***1,601,145***	▲ **7%** vs YTD April 2016

Top 5 Nationalities



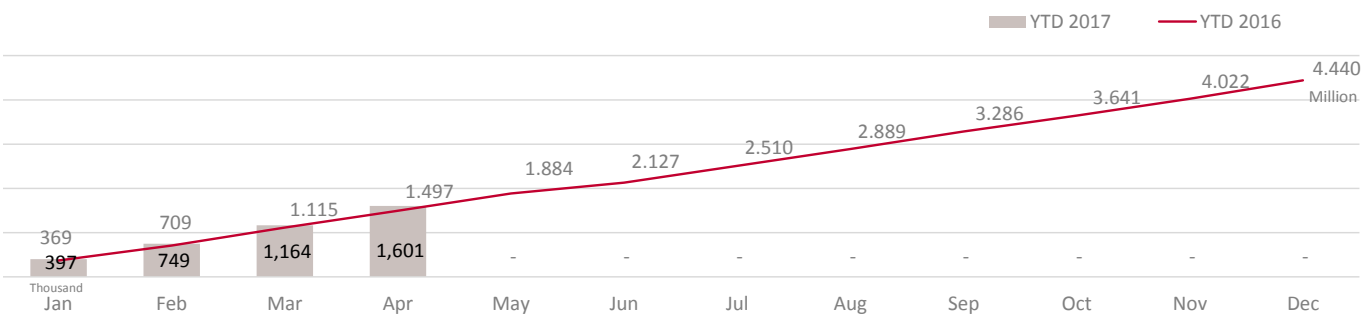


HOSPITALITY SECTOR PERFORMANCE

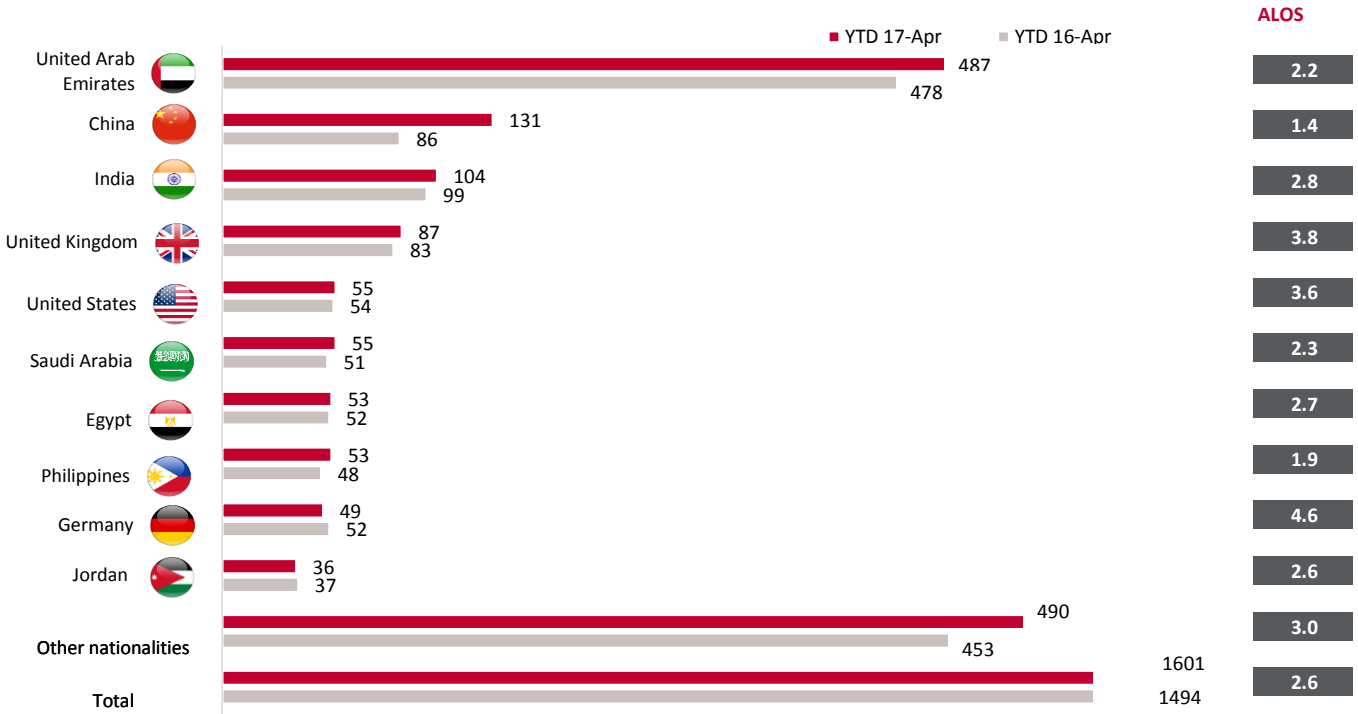
Occupancy rate	***76%***	▼ **-3%**
Average length of stay	***2.6*** **nights**	▼ **-6%**
Revenue per available room	***298*** **AED**	▼ **-10%**
Hotel revenues	***2.069*** **Billion AED**	▼ **-9%**

For description of the variables, please visit the glossary

HOTEL GUESTS



HOTEL GUESTS BY NATIONALITY (Thousand)

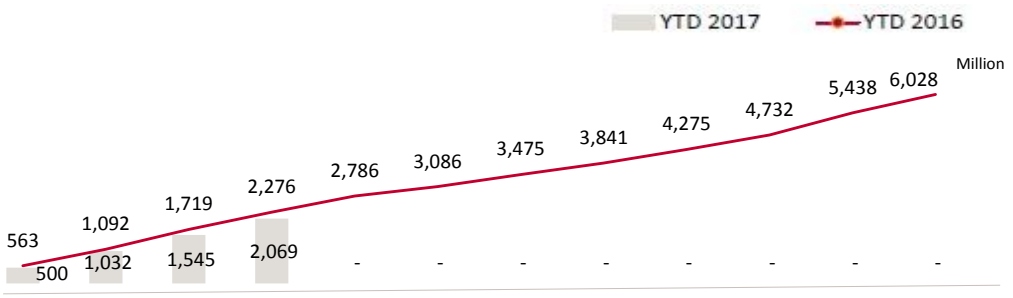


For description of the variables, please visit the glossary

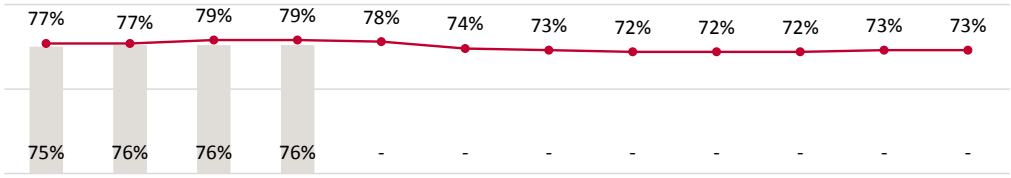
HOSPITALITY

SECTOR PERFORMANCE

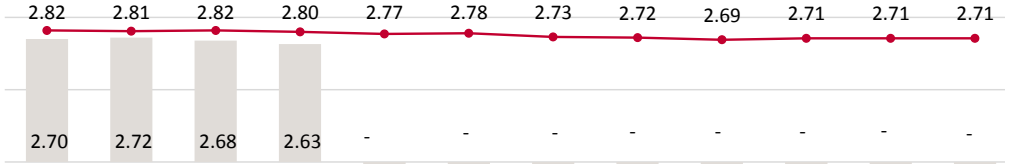
Revenues, M AED



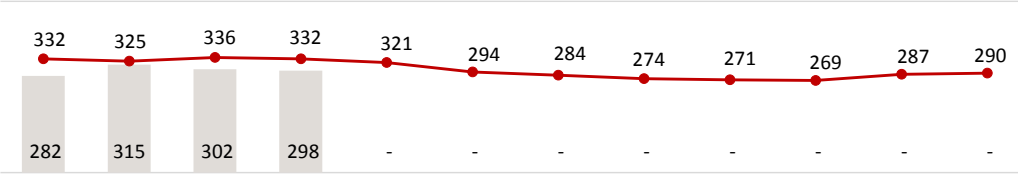
Occupancy, %



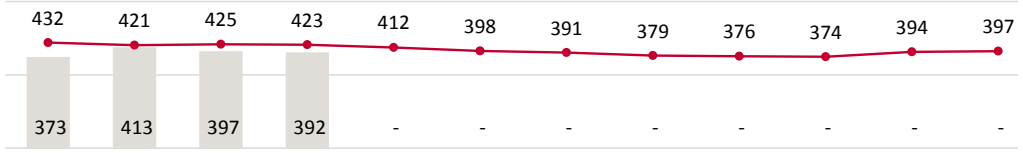
ALOS, days



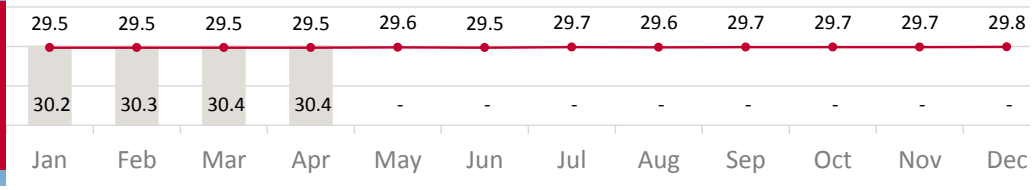
RevPAR, AED



ARR, AED



Av. rooms, thousands

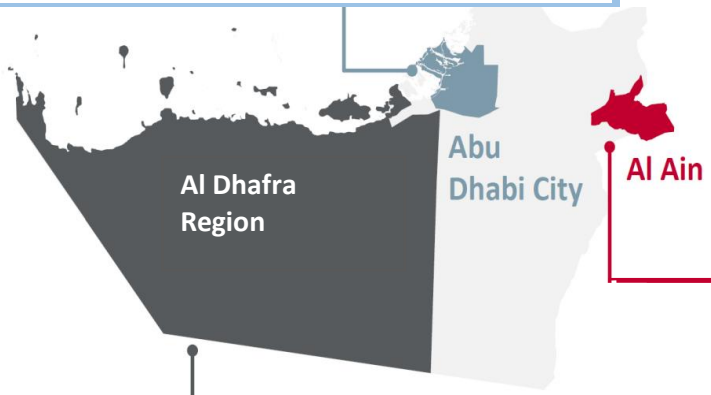


HOSPITALITY SECTOR PERFORMANCE

KEY INDICATORS BY REGION

Compared to YTD Apr 2016

Actual Guest Arrivals	1,407,851	9% ▲
Guest nights	3,799,267	2% ▲
ALOS, days	2.70	-7% ▼
Occupancy, %	77%	-3% ▼
Total revenues,M AED	1860	-8% ▼
ARR, AED	388	-6% ▼
RevPAR, AED	301	-9% ▼



Actual Guest Arrivals	144,541	-1% ▼
Guest nights	281,728	-7% ▼
ALOS, days	1.95	-6% ▼
Occupancy, %	65%	-8% ▼
Total revenues, M AED	118	-10% ▼
ARR, AED	351	-9% ▼
RevPAR, AED	229	-16% ▼

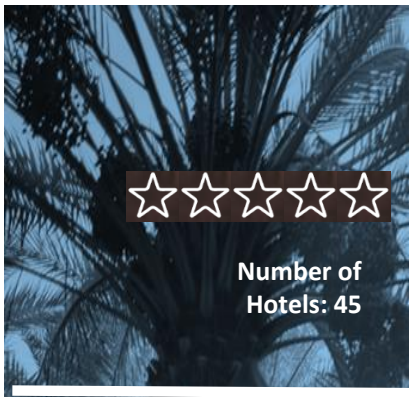
Actual Guest Arrivals	48,753	-8% ▼
Guest nights	129,164	-8% ▼
ALOS, days	2.65	1% ▲
Occupancy, %	61%	-10% ▼
Total revenues, M AED	90	-23% ▼
ARR, AED	589	-21% ▼
RevPAR, AED	361	-28% ▼

For description of the variables, please visit the glossary

HOSPITALITY

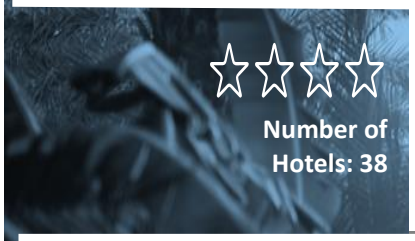
SECTOR PERFORMANCE

KEY INDICATORS PER HOTEL TYPE



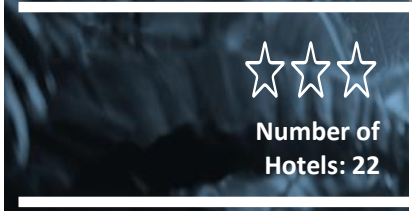
Number of Hotels: 45

Total room capacity	12,508
Occupancy	72%
ALOS	2.52 days
RevPAR	423 AED
Top 5 Nationalities	



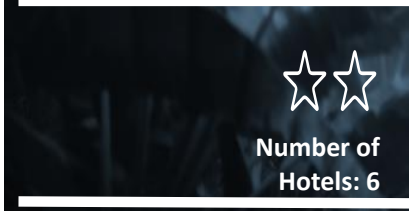
Number of Hotels: 38

Total room capacity	7,502
Occupancy	79%
ALOS	2.09 days
RevPAR	229 AED
Top 5 Nationalities	



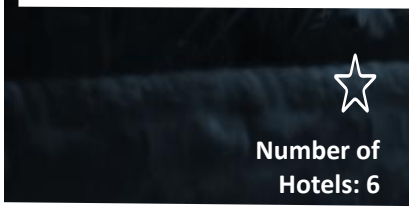
Number of Hotels: 22

Total room capacity	3,958
Occupancy	76%
ALOS	2.31 days
RevPAR	186 AED
Top 5 Nationalities	



Number of Hotels: 6

Total room capacity	534
Occupancy	85%
ALOS	2.39 days
RevPAR	153 AED
Top 5 Nationalities	



Number of Hotels: 6

Total room capacity	423
Occupancy	80%
ALOS	1.47 days
RevPAR	161 AED
Top 5 Nationalities	

DELUXE

Number of Hotel Apartments: 20

Total room capacity	3,281
Occupancy	80%
ALOS	6.39 days
RevPAR	272 AED
Top 5 Nationalities	

SUPERIOR

Number of Hotel Apartments: 19

Total room capacity	2,073
Occupancy	77%
ALOS	5.09 days
RevPAR	192 AED
Top 5 Nationalities	

STANDARD

Number of Hotel Apartments: 13

Total room capacity	733
Occupancy	75%
ALOS	3.71 days
RevPAR	163 AED
Top 5 Nationalities	

UPCOMING **EVENTS**

Jun 2017

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
				1	2 Abu Dhabi Awards 2017 Abu Dhabi	3
4	5	6	7	8	9	10
11	12	13	14	15 Collage Exhibition Al Qattara Arts Centre, Al Ain	16	17
18 Bayn- The In Between Abu Dhabi	19	20	21	22	23 Qasr AlHosn Exhibition	24
25	Start day 26 Al Ain Cultural Art Programme AL Ain	27	28	29	30 Rudy Rahme" Art Exhibition Abu Dhabi	

Jul 2017

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
30	31	Al Ain Cultural Art Programme AL Ain	Qasr AlHosn Exhibition Abu Dhabi	Al Jahili Fort Events AL Ain	Shabab Al Dar Safe Childhood FDF Center	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	Start day 20 Abu Dhabi Summer Season 2017 Emirate Wide	21	22
23	24	25	26	27	End day 28 The Creative Act Menara Al Saadiyat, Abu Dhabi	End day 29 Al Qattara Arts Center events Al Qattara Arts Center

TCA NEWS

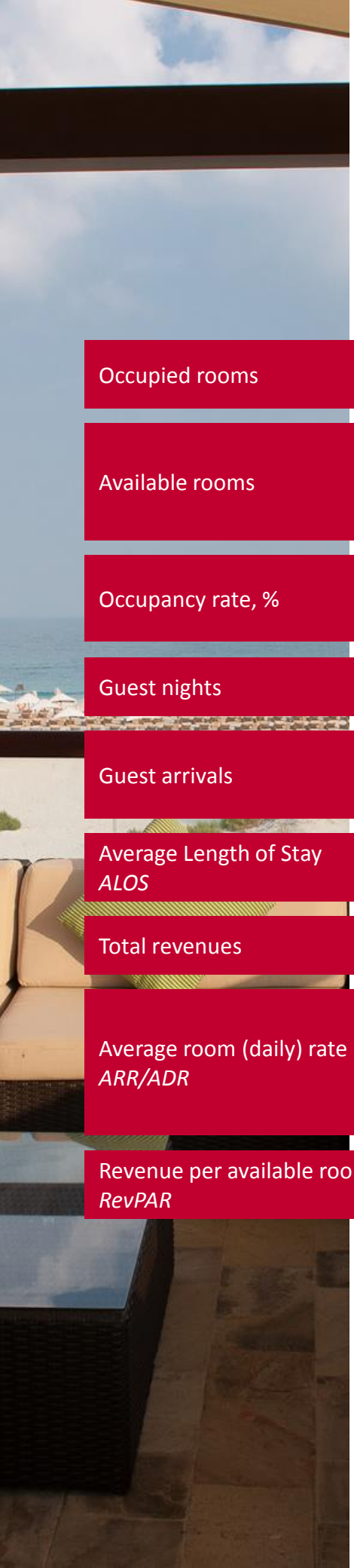
TCA Abu Dhabi hosted the inaugural **CultureSummit2017** convening 300 participants from more than 80 countries, including key players involved in the fields of government, arts, philanthropy, heritage preservation, education, media, science and technology.

Speakers included UNESCO Director General, Irina Bokova, who also toured the Al Ain oasis UNESCO world heritage site.

The 27th **Abu Dhabi International Book Fair** attracted over 300,000 visitors catering to keen readers of poetry, literature, and culture. Throughout the course of its week's duration, the Book Fair saw the participation of 1,320 exhibitors from 65 countries. In addition, the book fair hosted the annual International Prize for Arabic Fiction and Sheikh Zayed Book Awards.

TCA Abu Dhabi led travel trade delegations to **Arabian Travel Market and Riyadh Travel Fair** during April, pressing home the 'Your Extraordinary Story' destination campaign and signing a number of agreements to develop tradition-based factory attractions, medical and cruise tourism. Meanwhile, earlier in the month a delegation attended Saudi Arabia's largest travel trade event in Riyadh followed by a promotional tour across the kingdom to boost inbound visitor numbers.

The ***Collage Exhibition***, exploring a mixed-media exhibit featuring artworks created by twenty-three Emirati and UAE based artists, opened to the public at Al Ain's Al Qattara Arts Centre on 15 April 2017. Part of TCA Abu Dhabi's cultural programme, the exhibition runs until mid-June



GLOSSARY

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

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