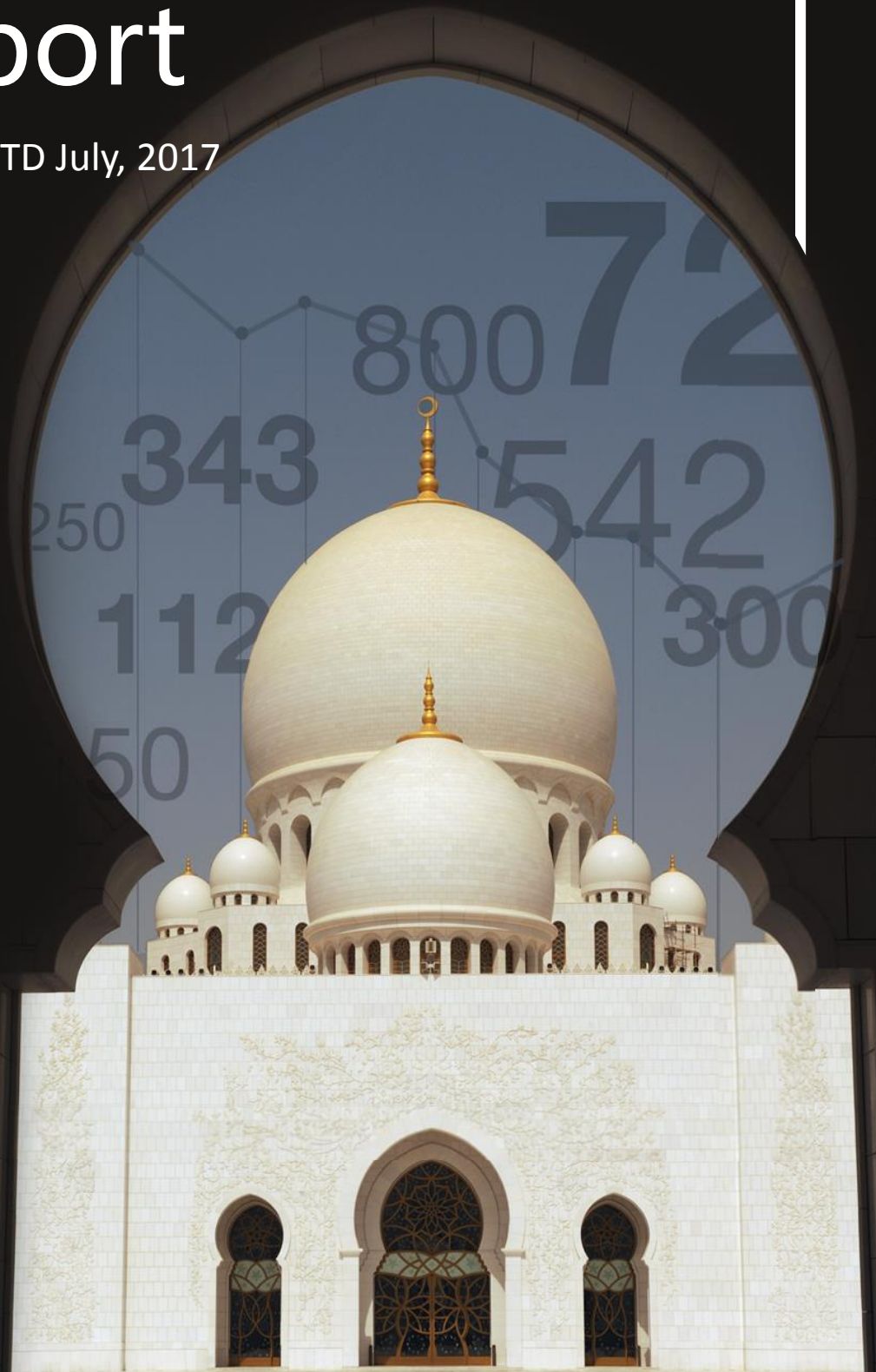


# Monthly Hotel Establishment Report

July and YTD July, 2017



30 August, 2017

Dear Hotel Partner,

It gives me great pleasure to share with you highlights of July's Hotel Establishments' Performance Report as part of our ongoing commitment to provide a continuous shared commentary.

Abu Dhabi sustained growth in hotel guest arrivals in July with almost 400,000 guests checking in to the emirate's 164 hotels and hotel apartments, representing a 4% increase over the same monthly period in 2016. Accordingly, the cumulative guest arrivals for the first seven months of the year have grown to reach over 2.6 million, maintaining a growth of 7% on the year.

July's double-digit percentage growth in visitors from China, UK, and USA and the month's UAE visitor arrivals total of 138,000 are encouraging and compare favourably when adjusted to take into account the Eid A Fitr boost contained in the July 2016 figures. India and Saudi Arabia continue to perform well, but it is clear that pressure remains on the key metrics of Average Length of Stay, Revenue Per Available Room and Occupancy.

All three regions – Abu Dhabi city, Al Ain and Al Dhafra – posted positive results, with the latter up 16% on the back of the hugely popular Liwa Date Festival. However, shorter stays in all three regions has resulted in fewer total guest nights and lower spend. Though there is still additional ground to cover, we have to consider that advances are being made against the backdrop of a destination which has seen a 9% increase in hotel room inventory this year compared to last.

Tackling the challenges of declining length of stay and revenues remains a priority. We have embarked on a strategy to leverage the increase in demand from regional visitors, specifically targeting visitors from the Kingdom of Saudi Arabia. With a prevalence for longer summer stays in 4- and 5-star hotels and superior quality hotel apartments, as well as a tendency to travel in larger family groups, we anticipate an increased number of Saudis will be attracted by the emirate's summer offers and activities.

Over the coming months, we'll also be extending our promotional activities overseas with attendance at leading cruise, MICE and leisure events in Europe, USA and Asia, where your continued support allows us to strengthen the emirate's destination appeal to international audiences.

Finally, following last month's IPSOS report which stated that Abu Dhabi was named the second-best city in the world to live, work and do business in, the emirate has now also been named the safest city in the world by Numbeo, a website that curates and collates data to develop the largest user-contributed database about cities and countries worldwide.

With international tourists ranking safety and security as a key decision making factor, Abu Dhabi is well placed to benefit.

Yours sincerely,

Saif Saeed Ghobash

Director General, Abu Dhabi Tourism & Culture Authority

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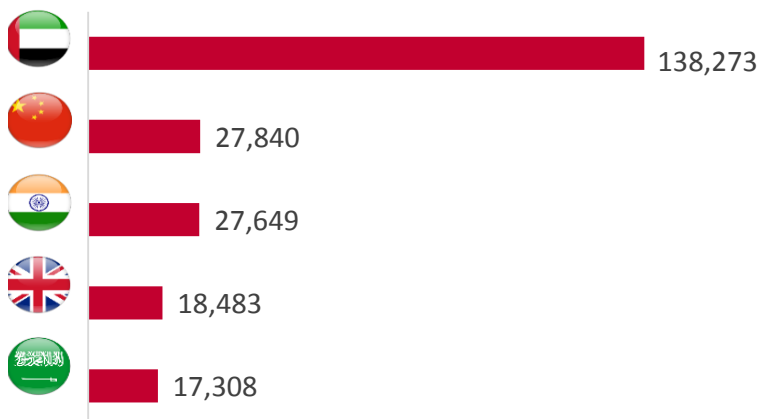


## ABU DHABI HOTEL GUESTS

Hotel Guests

**396,548** ▲ 4%  
vs July 2016

### Top 5 Nationalities (Hotel Guests)



## HOSPITALITY SECTOR PERFORMANCE

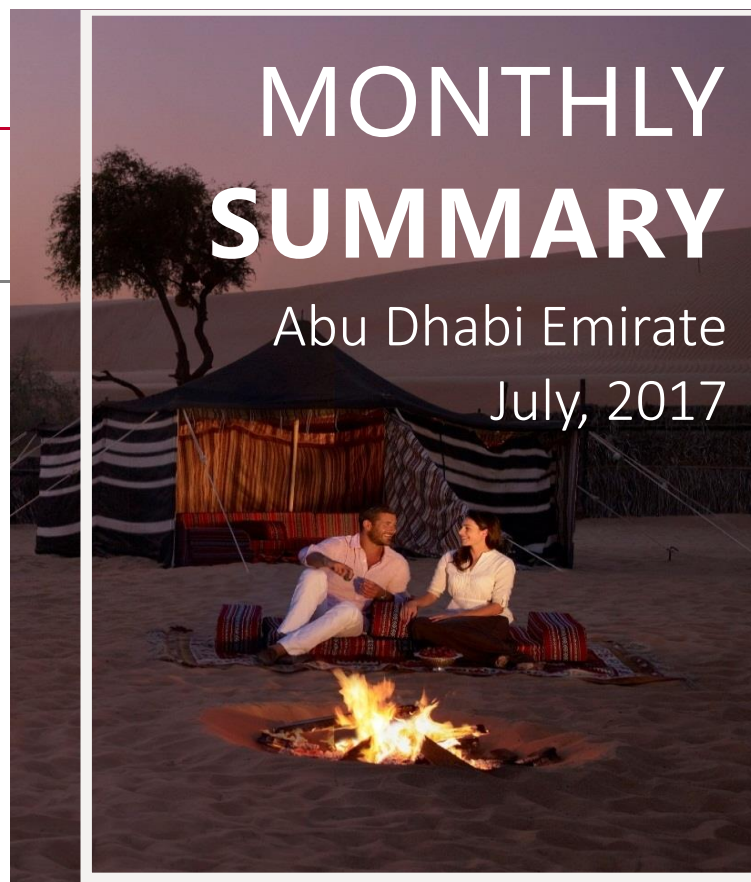
Occupancy rate **63%** ▼ -3%

Average length of stay **2.34** ▼ -6%  
Nights

Revenue per available room **162** ▼ -23%  
AED

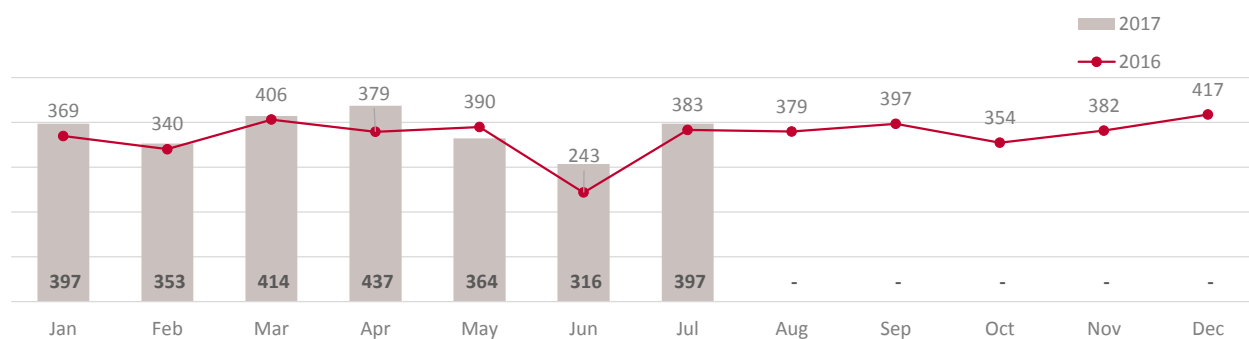
Hotel revenues **327** ▼ -11%  
M AED

For description of the variables, please visit the glossary

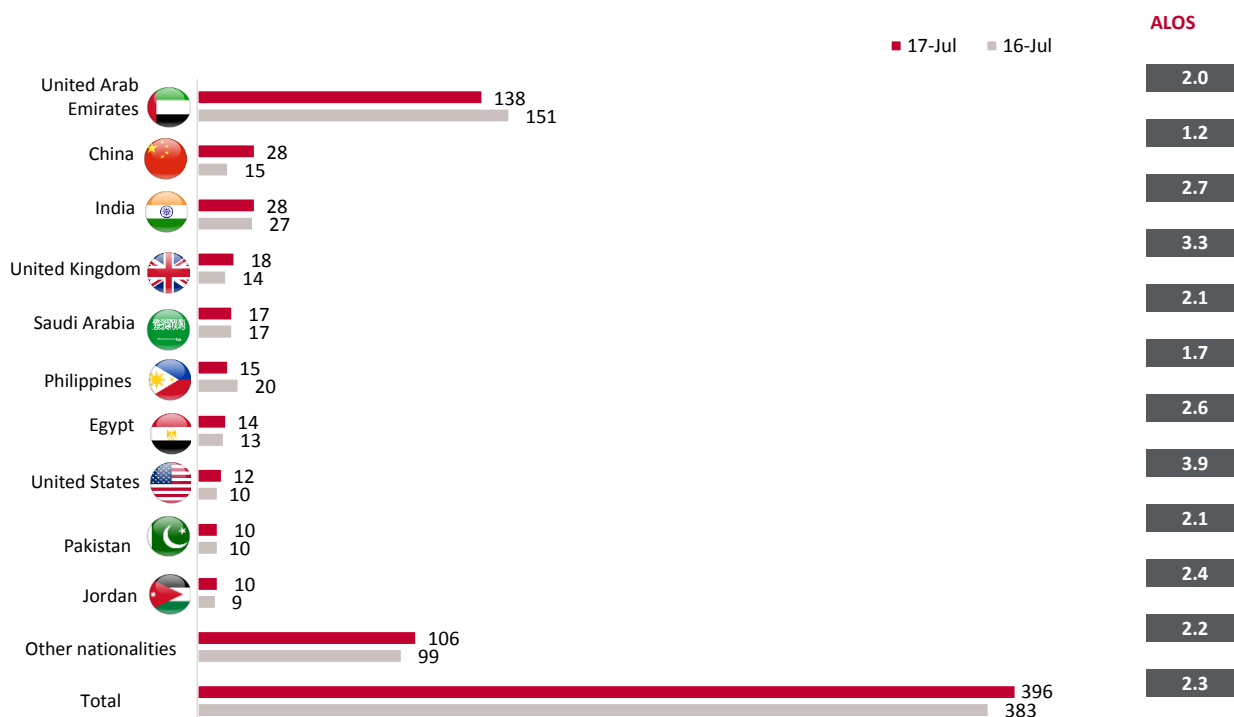




## HOTEL GUESTS (thousands)



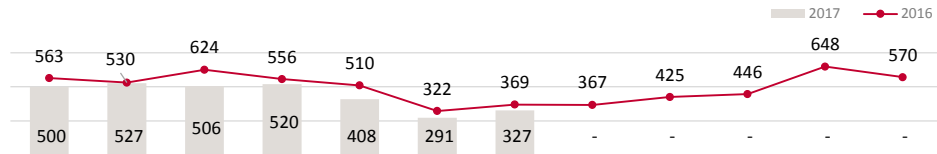
## HOTEL GUESTS BY NATIONALITY (thousands)



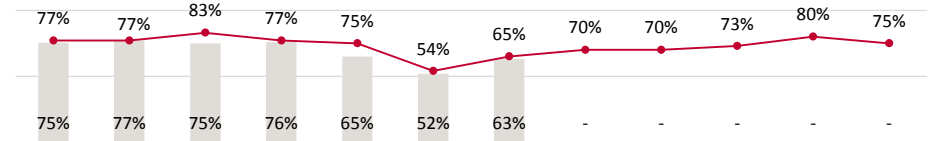
# HOSPITALITY SECTOR PERFORMANCE

## KEY INDICATORS

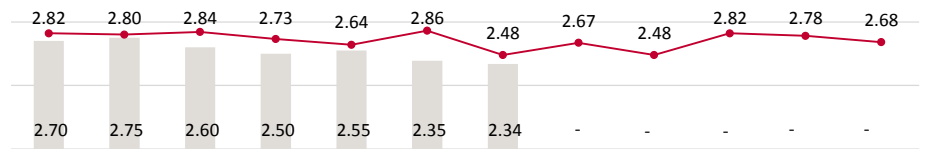
**Revenues,  
M AED**



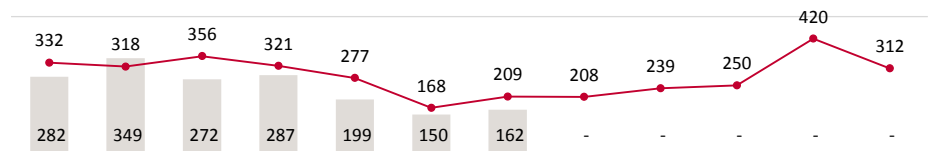
**Occupancy,  
%**



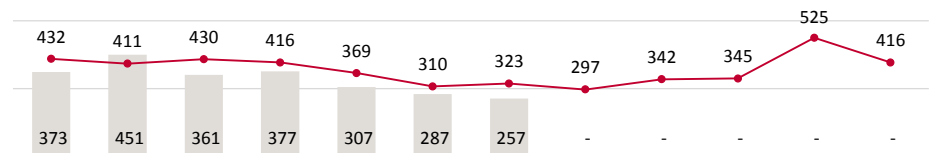
**ALOS,  
days**



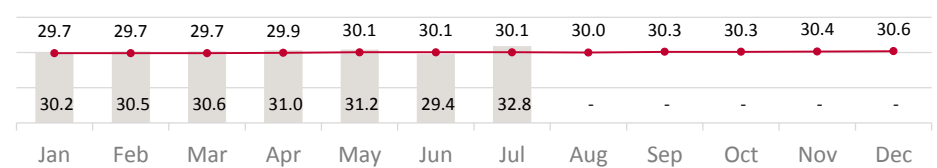
**RevPAR,  
AED**



**ARR,  
AED**



**Av. rooms,  
thousands**



For description of the variables, please visit the glossary

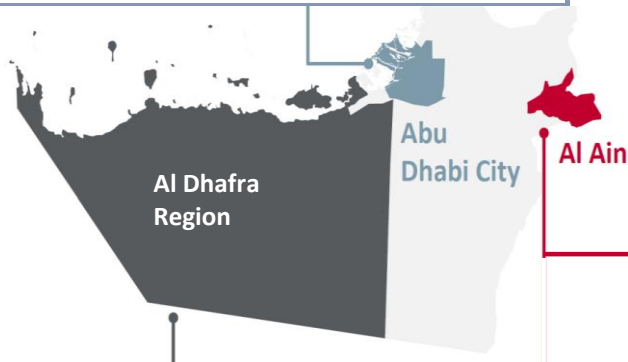


# HOSPITALITY SECTOR PERFORMANCE

## KEY INDICATORS BY REGION

Compared to  
July 2016

Actual Guest	349,203	3% ▲
Guest nights	839,656	-1% ▼
ALOS, days	2.40	-4% ▼
Occupancy, %	64%	0% ▼
Total revenues, M AED	293	-8% ▼
ARR, AED	253	-19% ▼
RevPAR, AED	163	-20% ▼

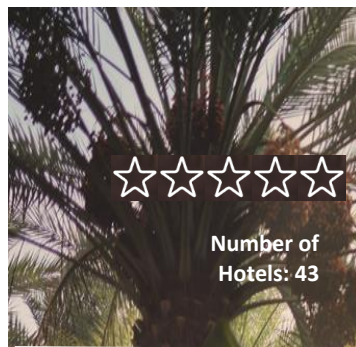


Actual Guest	39,846	2% ▲
Guest nights	72,538	-2% ▼
ALOS, days	1.82	-4% ▼
Occupancy, %	56%	-14% ▼
Total revenues, M AED	25	-18% ▼
ARR, AED	280	-24% ▼
RevPAR, AED	156	-35% ▼

Actual Guest	7,499	16% ▲
Guest nights	16,308	-44% ▼
ALOS, days	2.17	-52% ▼
Occupancy, %	33%	-50% ▼
Total revenues, M AED	9	-54% ▼
ARR, AED	421	-22% ▼
RevPAR, AED	139	-61% ▼

## HOSPITALITY SECTOR PERFORMANCE

KEY INDICATORS PER HOTEL TYPE



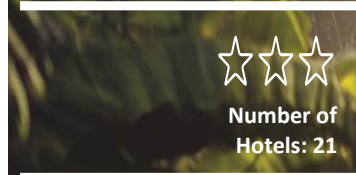
Total room capacity 12,485  
Occupancy 50%  
ALOS 2.17 days  
RevPAR 191 AED

Top 5 Nationalities



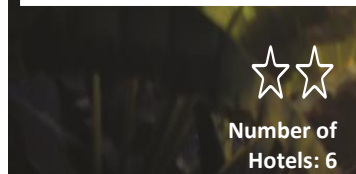
Total room capacity 7,803  
Occupancy 73%  
ALOS 1.77 days  
RevPAR 123 AED

Top 5 Nationalities



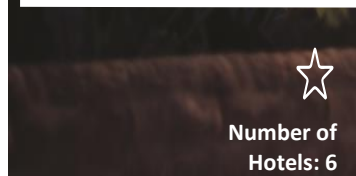
Total room capacity 3,795  
Occupancy 66%  
ALOS 2.00 days  
RevPAR 118 AED

Top 5 Nationalities



Total room capacity 534  
Occupancy 67%  
ALOS 2.29 days  
RevPAR 107 AED

Top 5 Nationalities



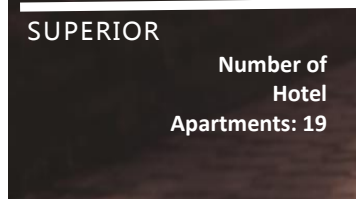
Total room capacity 425  
Occupancy 68%  
ALOS 1.83 days  
RevPAR 116 AED

Top 5 Nationalities



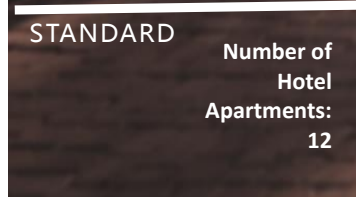
Total room capacity 3,216  
Occupancy 75%  
ALOS 8.60 days  
RevPAR 237 AED

Top 5 Nationalities



Total room capacity 2,003  
Occupancy 66%  
ALOS 5.39 days  
RevPAR 148 AED

Top 5 Nationalities



Total room capacity 709  
Occupancy 67%  
ALOS 4.24 days  
RevPAR 133 AED

Top 5 Nationalities



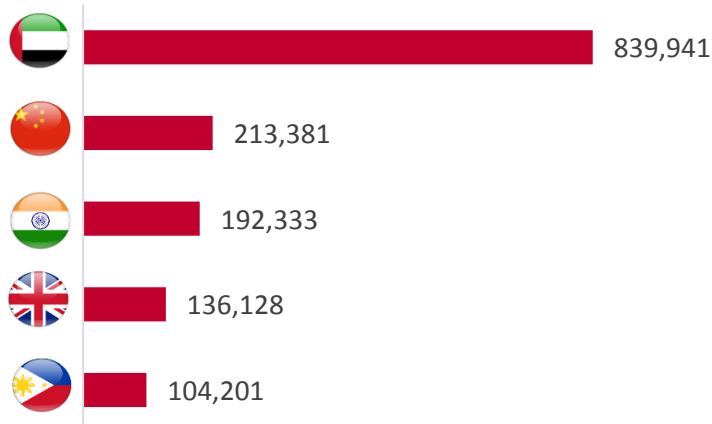


## ABU DHABI HOTEL GUESTS

Hotel Guests

**2,677,953** ▲ 7%  
vs YTD July 2016

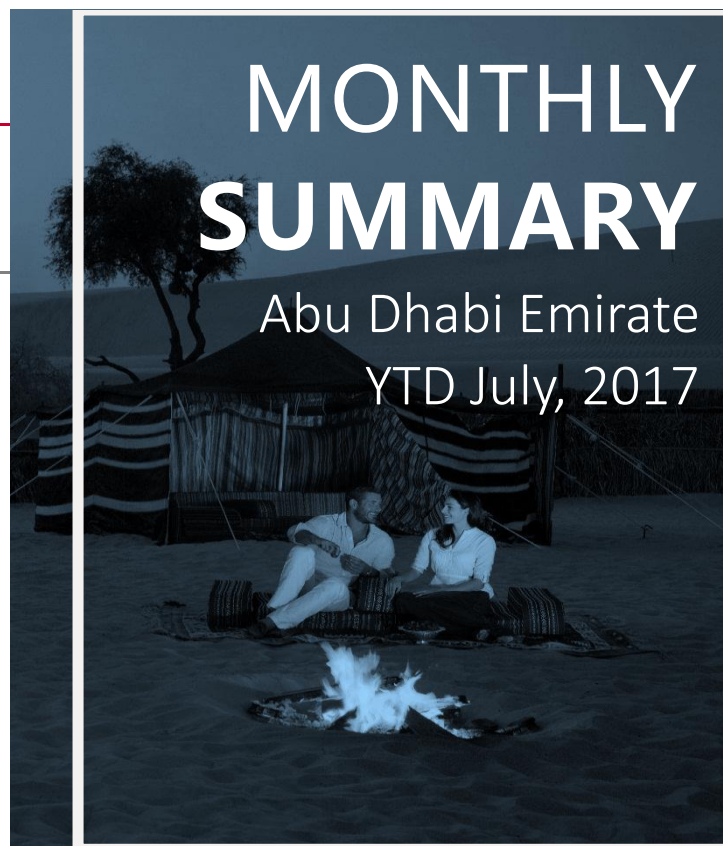
### Top 5 Nationalities



## HOSPITALITY SECTOR PERFORMANCE

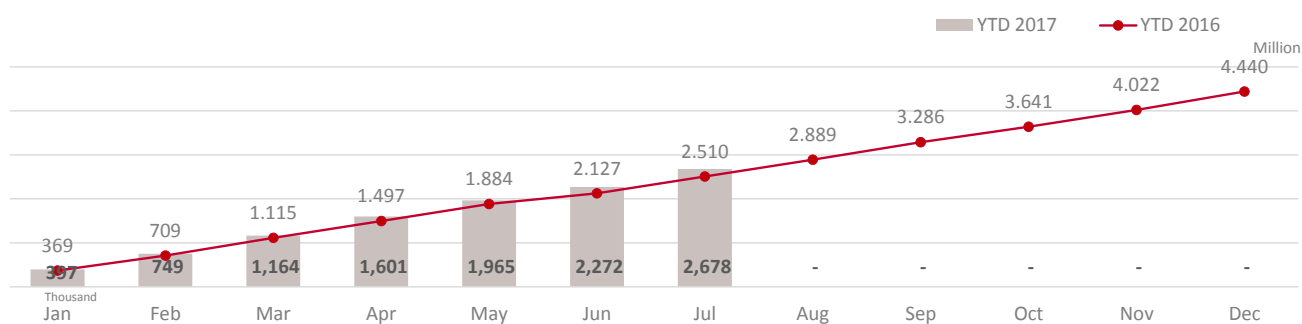
Occupancy rate	<b>69%</b>	▼ -5%
Average length of stay	<b>2.54</b> nights	▼ -7%
Revenue per available room	<b>242</b> AED	▼ -15%
Hotel revenues	<b>3.100</b> Billion AED	▼ -11%

For description of the variables, please visit the glossary

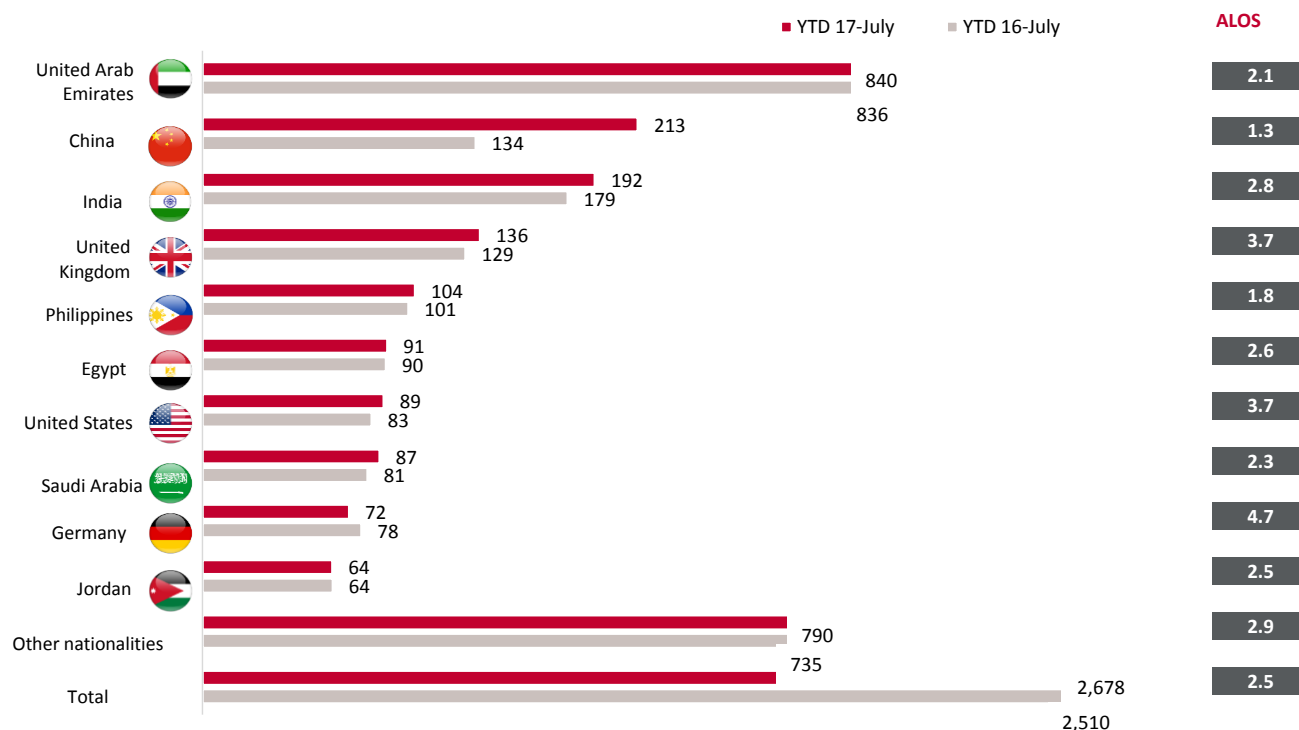




## HOTEL GUESTS



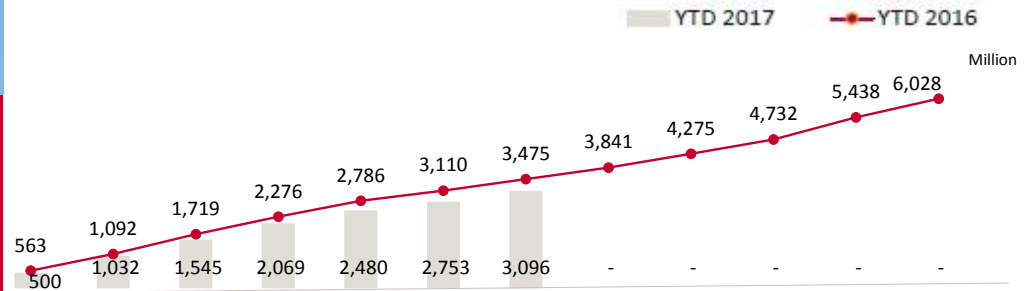
## HOTEL GUESTS BY NATIONALITY (Thousand)



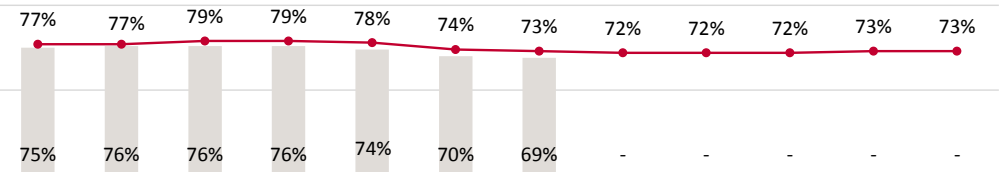
## HOSPITALITY

### SECTOR PERFORMANCE

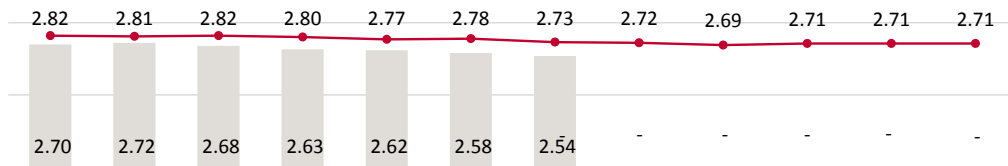
**Revenues,  
M AED**



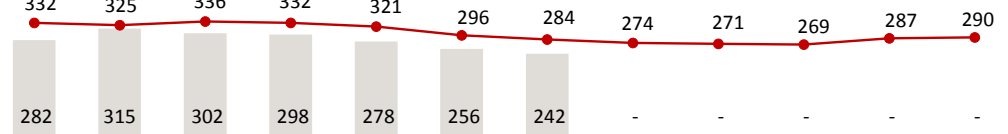
**Occupancy,  
%**



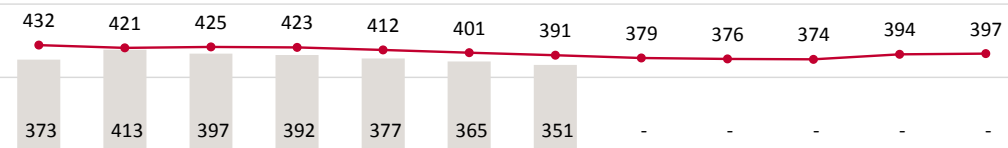
**ALOS,  
days**



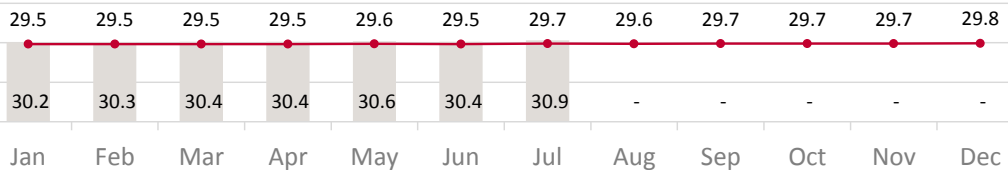
**RevPAR,  
AED**



**ARR,  
AED**



**Av. rooms,  
thousands**

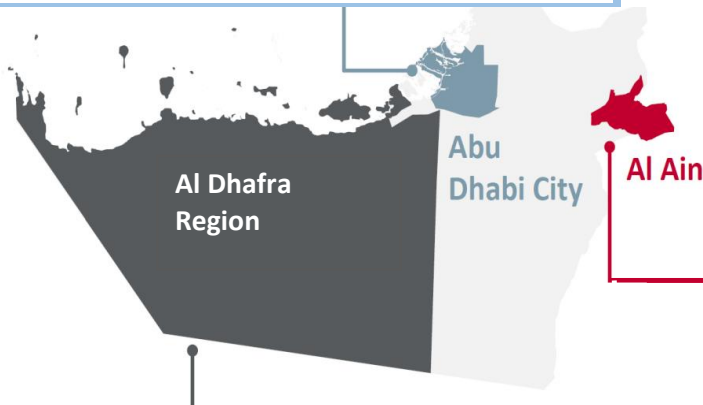


# HOSPITALITY SECTOR PERFORMANCE

## KEY INDICATORS BY REGION

Compared to  
YTD July 2016

Actual Guest Arrivals	2,361,206	8% ▲
Guest nights	6,154,000	0% ▲
ALOS, days	2.61	-7% ▼
Occupancy, %	71%	-3% ▼
Total revenues, M AED	2,790	-9% ▼
ARR, AED	346	-9% ▼
RevPAR, AED	245	-12% ▼



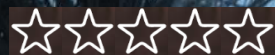
Actual Guest Arrivals	243,353	0% ▲
Guest nights	474,064	-3% ▼
ALOS, days	1.95	-3% ▼
Occupancy, %	58%	-12% ▼
Total revenues, M AED	189	-14% ▼
ARR, AED	325	-15% ▼
RevPAR, AED	189	-25% ▼

Actual Guest Arrivals	73,394	-1% ▼
Guest nights	180,512	-20% ▼
ALOS, days	2.46	-19% ▼
Occupancy, %	49%	-26% ▼
Total revenues, M AED	122	-32% ▼
ARR, AED	554	-17% ▼
RevPAR, AED	269	-38% ▼

# HOSPITALITY

## SECTOR PERFORMANCE

### KEY INDICATORS PER HOTEL TYPE



Number of  
Hotels: 43

Total room capacity **12,485**  
Occupancy 62%  
ALOS **2.39** days  
RevPAR 325 **AED**

Top 5 Nationalities



Number of  
Hotels: 38

Total room capacity **7,803**  
Occupancy 74%  
ALOS **1.96** days  
RevPAR 187 **AED**

Top 5 Nationalities



Number of  
Hotels: 21

Total room capacity **3,795**  
Occupancy 70%  
ALOS **2.23** days  
RevPAR 154 **AED**

Top 5 Nationalities



Number of  
Hotels: 6

Total room capacity **534**  
Occupancy 77%  
ALOS **2.34** days  
RevPAR 133 **AED**

Top 5 Nationalities



Number of  
Hotels: 6

Total room capacity **425**  
Occupancy 73%  
ALOS **1.59** days  
RevPAR 147 **AED**

Top 5 Nationalities



#### DELUXE

Number of Hotel  
Apartments: 19

Total room capacity **3,216**  
Occupancy 77%  
ALOS **7.11** days  
RevPAR 257 **AED**

Top 5 Nationalities



#### SUPERIOR

Number of  
Hotel  
Apartments: 19

Total room capacity **2,003**  
Occupancy 73%  
ALOS **5.43** days  
RevPAR 175 **AED**

Top 5 Nationalities



#### STANDARD

Number of  
Hotel  
Apartments:  
12

Total room capacity **709**  
Occupancy 72%  
ALOS **3.93** days  
RevPAR 152 **AED**

Top 5 Nationalities





# UPCOMING EVENTS

Sep  
2017

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
					Start day Sep 1 to Sep 30, 2017 300m Sniper Rifle Competition Abu Dhabi	
3	4	5	6	7	8	9
	Start day Sep 4 to Sep 9, 2017 The International Festival of Falconry			Abu Dhabi		
10	11	12	13	14	15	16
	Start day Sep 12 to Sep 16, 2017 Abu Dhabi International Hunting and Equestrian Exhibition 2017			Abu Dhabi		
17	18	19	20	21	22	23
24	25	End day Promote the Active Involvement of Men in Family life Program 2017 Abu Dhabi	26	27	28	29
						30

Oct  
2017

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Start day Oct 1 to , Nov 30 2017 Top Archer Competition Abu Dhabi	2	3	4	5	6	Abu Dhabi Junior Aquathlon 1 Abu Dhabi
8	9	10	11	12	13	14
					ADCB ZSC Pink 5&10k Run Abu Dhabi	
Start day Oct 14 to , Oct 19 2017	16	17	18	19	20	21
	World Skills Abu Dhabi 2017 Abu Dhabi				Yas Marina Boat Festival Abu Dhabi	
22	23	24	25	26	27	28
			Smart Business Expo & India Trade Expo Abu Dhabi			
29	30	31				





# TCA ABU DHABI NEWS



**Abu Dhabi Art 2017** will return this November with 48 established and emerging galleries from 18 different countries, offering works by a diverse range of globally celebrated and up and coming artists. Running from November 8 – 11, the fair will feature galleries from Europe, Asia, North America and the Middle East and will see the introduction of a new curated section by Dr. Omar Kholeif entitled **Focus: Beyond Territory**. In addition to the gallery programme, Abu Dhabi Art 2017 will present a series of stimulating cultural talks on local and GCC-wide art histories and narratives



**Abu Dhabi welcomed more than 2.25 million guests** in the first six months of 2017 – an increase of 7% over the first half of last year. Abu Dhabi recorded a remarkable 30% increase in the number of hotel guest arrivals this June, compared to the same month in 2016, boosted by an exceptional Eid Al Fitr period, which saw many premium hotels fully booked.

Abu Dhabi has been named the second-best city in the world to live, work and do business in, overtaking both London and Paris and moving up two places since the last **Ipsos City Index**. More than 18,000 people, aged between 16 and 64, in 26 countries worldwide were interviewed for the Index, with New York maintaining the overall world number one spot. The leading destinations were chosen from an overall list of sixty cities, including major hubs like Sydney, Hong Kong, Cape Town, Moscow, Toronto, and many more.

TCA Abu Dhabi embarked on a whirlwind three-city **United States roadshow** recently to help create more awareness about the emirate and encourage even more US visitors to experience the destination. The delegation visited New York, Chicago and Los Angeles, hosted meetings with major travel agents and key influencers from some of the US's leading travel organisations including Altour, American Express Travel, BCD Travel, Omega World Travel, Signature and Virtuoso.



Meanwhile, to coincide with Manchester City Football Club's pre-season tour, a season-long campaign 'Extraordinary City Story' partnership was launched with Manchester City Football Club that which gives fans the chance to create their own extraordinary story on a trip to the UAE capital by sharing their own extraordinary memories and stories about being a Manchester City fan.

# 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

### Disclaimer:

All rights reserved. Report content is based on available information at the time of publishing and is subject to change without notice when more accurate or complete data is available