



ABU DHABI HOTEL PERFORMANCE REPORT

Q3 2019



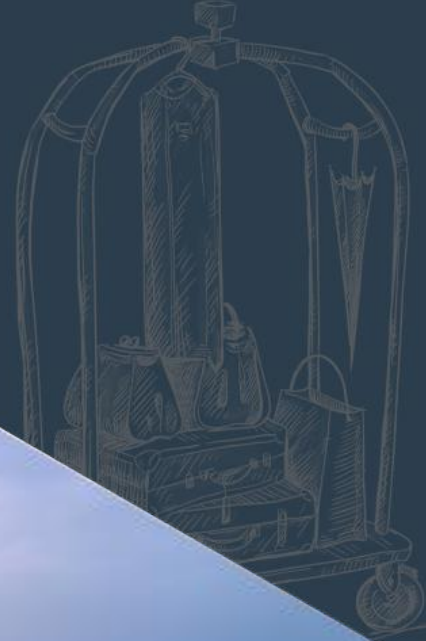


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KEY HIGHLIGHTS



Q3 2019	HOTEL GUESTS	HOTEL OCCUPANCY	HOTEL REVENUES	ALOS (NIGHTS)
	1.3 M ▲ +1.7% (FROM Q3 2018)	69% ▲ +4.0% (FROM Q3 2018)	1.1 B ▲ +1.7% (FROM Q3 2018)	2.5 ▲ +5.6% (FROM Q3 2018)

YTD 2019	3.8 M	71%	4.0 B	2.6
	▲ +2.9% (FROM YTD 2018)	▲ +1.6% (FROM YTD 2018)	▲ +8.1% (FROM YTD 2018)	▲ +2.0% (FROM YTD 2018)

Other Key Indicators (AED)	Q3 2019		YTD 2019	
	Actual	% Change vs Previous Year	Actual	% Change vs Previous Year
Hotel ARR	279	-1.5%	345	+6.8%
Hotel REVPAR	191	+2.4%	244	+8.6%
Room Revenues	568 M	+6.1%	2,166 M	+14.3%
F&B Revenues	352 M	-0.8%	1,384 M	+4.1%
Other Revenues	137 M	-8.4%	440 M	-5.6%

HOTEL SUPPLY

Q3 2019



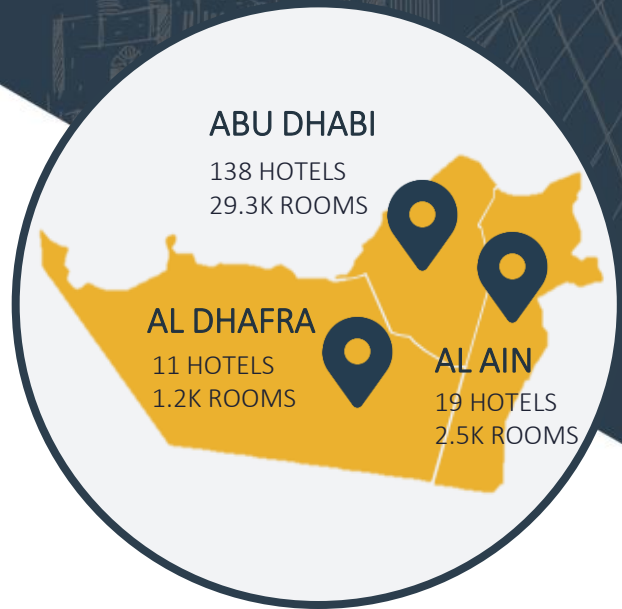
168

HOTELS



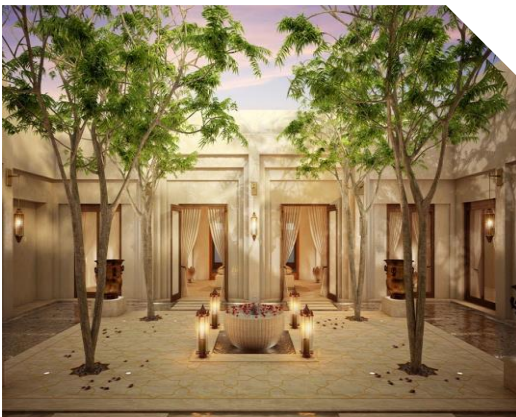
33.0K

ROOMS



STAR RATING	5 STAR	4 STAR	1-3 STAR	APTS
	54 HOTELS 15.2K ROOMS	36 HOTELS 7.6K ROOMS	33 HOTELS 4.6K ROOMS	45 HOTELS 5.7K ROOMS

RECENT SUPPLY ADDITIONS & CLOSURES – HY 2019



OPENED: **FEB 2019**

JUMERIAH AL WATBHA
KHALIFA & OUTSKIRTS
TYPE: 5 STAR
ROOMS: 103



CLOSED: **APR 2019**

AL SHUROOQ APTS
CORNICHE & LULU
TYPE: STANDARD
ROOMS: 32

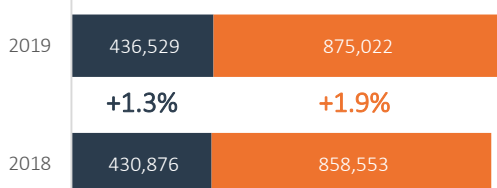
SOURCE: DCT LICENSING DEPARTMENT

HOTEL GUESTS

Q3 2019

1,311,551

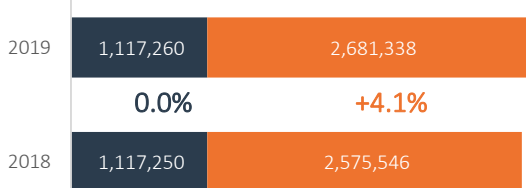
▲ +1.7% FROM Q3 2018



YTD 2019

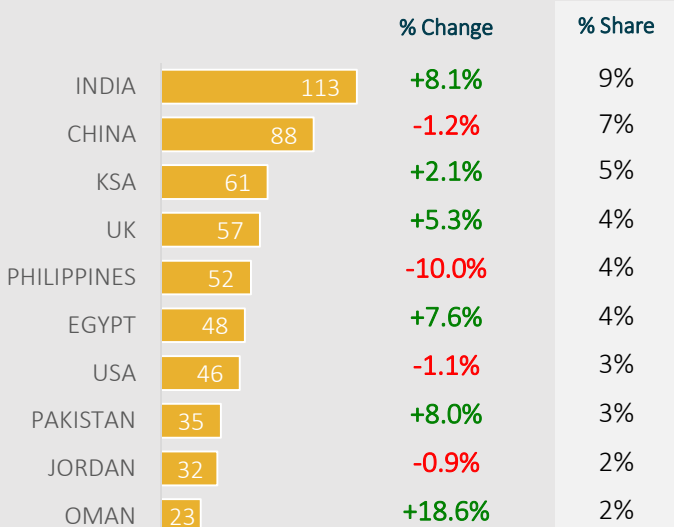
3,798,598

▲ +2.9% FROM YTD 2018

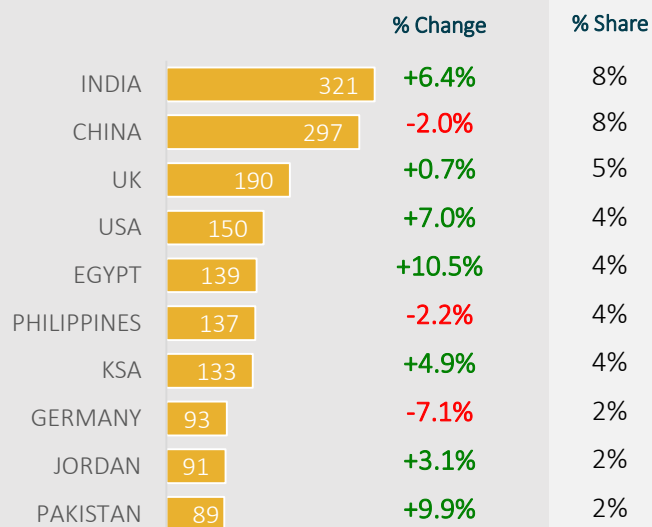


*UAE refers to UAE citizens

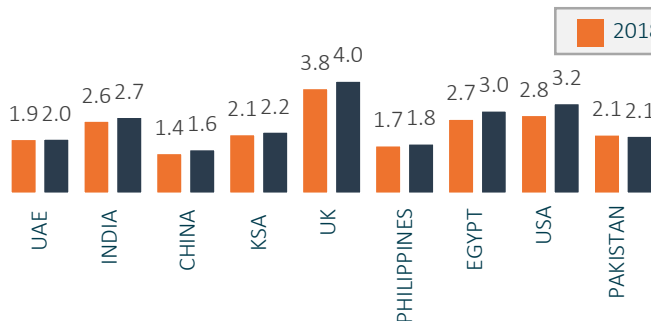
TOP NON-UAE NATIONALITIES (000) – Q3 2019



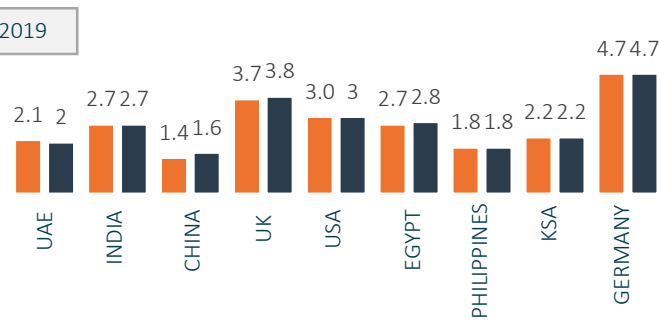
TOP NON-UAE NATIONALITIES (000) – YTD 2019



ALOS (NIGHTS)– Q3 2019



ALOS (NIGHTS)– YTD 2019



PURPOSE OF VISIT - Q3 2019



PURPOSE OF VISIT - YTD 2019



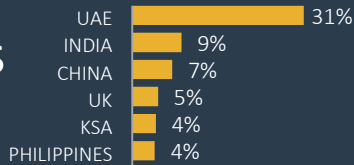
Legend: Leisure (Dark Blue), Business (Light Blue), MICE (Orange), VFR (Grey), Others (White)

PERFORMANCE BY REGION

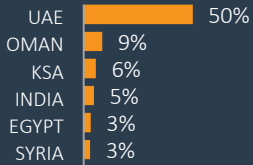
Q3 2019	ABU DHABI		AL AIN		AL DHAFRA	
Key Indicators	Actual	% Change vs Previous Year	Actual	% Change vs Previous Year	Actual	% Change vs Previous Year
GUESTS	1,158,220	+1.8%	126,804	+4.0%	26,527	-12.4%
OCCUPANCY RATE	70%	+4.1%	58%	-3.6%	40%	+2.8%
ALOS (NIGHTS)	2.6	+7.1%	1.7	-8.6%	2.1	-3.9%
REVENUES (M AED)	966	+2.7%	62	-10.6%	29	-2.6%
ARR (AED)	279	-1.0%	240	-10.7%	417	+10.9%
REVPAR (AED)	196	+3.0%	140	-14.0%	166	+14.0%

TOP NATIONALITIES Q3 2019

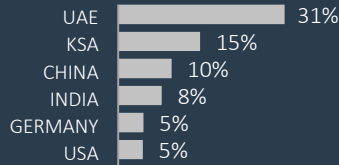
ABU DHABI



AL AIN



AL DHAFRA



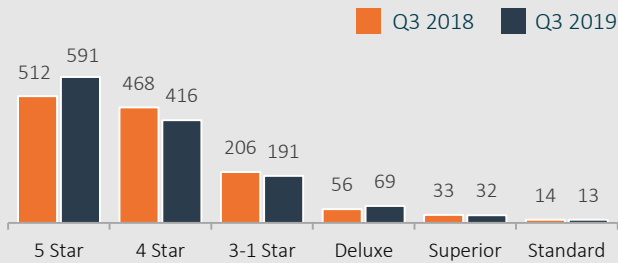
YTD 2019	ABU DHABI		AL AIN		AL DHAFRA	
Key Indicators	Actual	% Change vs Previous Year	Actual	% Change vs Previous Year	Actual	% Change vs Previous Year
GUESTS	3,334,758	+2.2%	365,169	+11.1%	98,671	-3.7%
OCCUPANCY RATE	73%	+1.1%	60%	+4.2%	44%	+4.2%
ALOS (NIGHTS)	2.7	+2.7%	1.9	-4.6%	2.1	+0.5%
REVENUES (M AED)	3,622	+8.6%	209	-1.9%	159	+11.9%
ARR (AED)	343	+7.4%	271	-3.7%	647	+14.6%
REVPAR (AED)	249	+8.5%	162	+0.4%	288	+19.5%



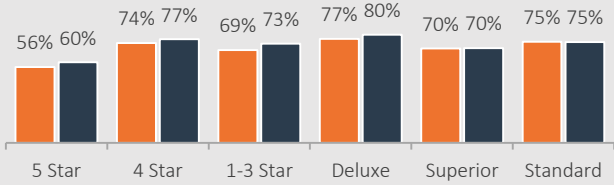
PERFORMANCE BY STAR RATING

Q3 2019

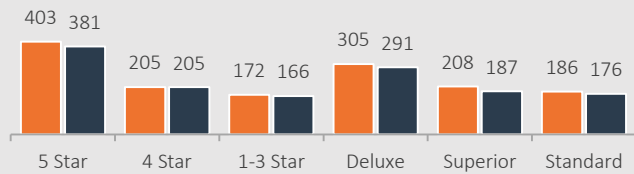
HOTEL GUESTS (000)



OCCUPANCY RATE (%)

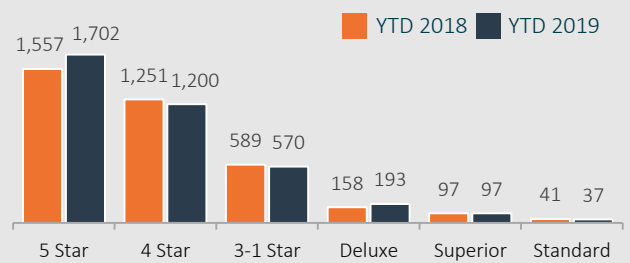


ARR (AED)

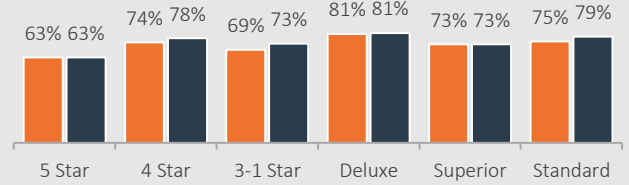


YTD 2019

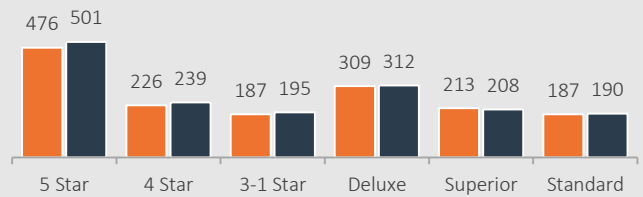
HOTEL GUESTS (000)



OCCUPANCY RATE (%)

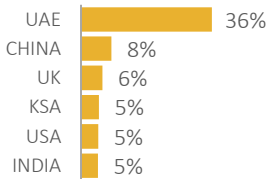


ARR (AED)

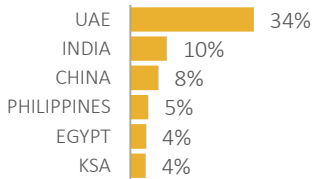


TOP NATIONALITIES – Q3 2019

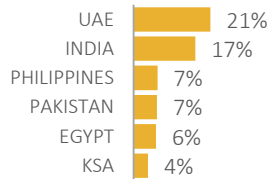
5 STAR



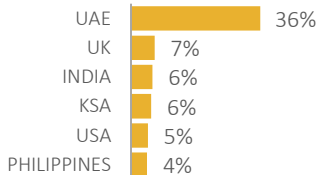
4 STAR



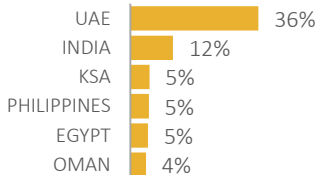
1-3 STAR



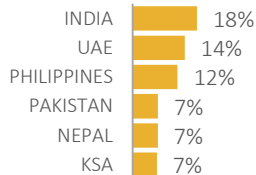
DELUXE



SUPERIOR



STANDARD



YAS ISLAND PERFORMANCE

7 HOTELS
2,259 ROOMS



STAR RATING

5 STAR

1 HOTEL
499 ROOMS

4 STAR

3 HOTELS
1,133 ROOMS

1-3 STAR

2 HOTELS
463 ROOMS

APTS

1 HOTELS
164 ROOMS

Q3 2019

YTD 2019

Key Indicators

Actual

% Change vs
Previous Year

Actual

% Change vs
Previous Year

Guests

122,475

-6.7%

319,868

-1.0%

Occupancy

75%

+4.7%

78%

+5.4%

Revenues (AED)

73 M

-1.7%

267 M

+5.0%

ALOS (Nights)

2.2

+8.9%

2.5

+3.4%

ARR (AED)

297

+2.1%

333

+4.5%

REVPAR (AED)

222

+6.9%

259

+10.2%

TOP NATIONALITIES (000) – Q3 2019

Nationality	Value (000)	% Change	% Share
UAE	36.1	-21.8%	30%
INDIA	12.2	+7.0%	10%
KSA	11.3	+26.5%	9%
CHINA	7.9	-26.2%	6%
UK	6.5	-13.9%	5%
KUWAIT	3.8	+60.5%	3%
EGYPT	3.6	+6.5%	3%
PHILIPPINES	3.5	-24.8%	3%
PAKISTAN	3.4	+19.3%	3%
USA	3.3	+25.1%	3%
OMAN	3.0	+130%	2%

TOP NATIONALITIES (000) – YTD 2019

Nationality	Value (000)	% Change	% Share
UAE	78.7	-12.7%	25%
INDIA	38.6	+12.6%	12%
UK	24.2	-8.1%	8%
CHINA	21.8	-22.2%	7%
KSA	20.1	+21.1%	6%
PHILIPPINES	11.2	+14.6%	3%
USA	10.9	+23.8%	3%
EGYPT	8.4	+3.6%	3%
KUWAIT	7.1	+76.1%	2%
PAKISTAN	6.7	+30.6%	2%
JORDAN	6.2	-5.4%	2%

SAADIYAT & NICHE AREAS PERFORMANCE

6 HOTELS
1,755 ROOMS



STAR RATING

5 STAR

6 HOTELS
1,755 ROOMS

4 STAR

1-3 STAR

APTS

PERFORMANCE

Q3 2019

YTD 2019

Key Indicators

Actual

% Change vs
Previous Year

Actual

% Change vs
Previous Year

Guests

43,976

+71.3%

124,348

+91.7%

Occupancy

52%

+20.5%

61%

+13.5%

Revenues (AED)

101 M

+48.7%

466 M

+65.8%

ALOS (Nights)

3.5

+13.4%

4.1

+4.8%

ARR (AED)

721

-5.1%

973

-1.2%

REVPAR (AED)

376

+14.4%

590

+12.2%

TOP NATIONALITIES (000) – Q3 2019

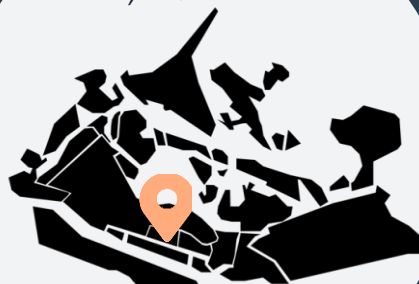
Nationality	Value (000)	% Change	% Share
UAE	19.2	+57.7%	44%
UK	5.0	+190.6%	11%
GERMANY	3.6	+59.2%	8%
KAZAKHTSAN	2.1	+1247%	5%
KSA	1.9	+102.0%	4%
RUSSIA	1.3	+305.3%	3%
KUWAIT	0.9	+58.2%	2%
FRANCE	0.7	+23.2%	2%
USA	0.6	+9.5%	1%
SWITZERLAND	0.6	+56.1%	1%
INDIA	0.6	-1.0%	1%

TOP NATIONALITIES (000) – YTD 2019

Nationality	Value (000)	% Change	% Share
UAE	36.3	+57.0%	29%
UK	14.6	+183.8%	12%
GERMANY	13.9	+68.8%	11%
RUSSIA	7.2	+344.6%	6%
KAZAKHSTAN	5.5	+1290%	4%
KSA	3.8	+112.4%	3%
FRANCE	3.7	+26.5%	3%
ITALY	3.1	+37.2%	3%
USA	3.1	+57.0%	2%
SWITZERLAND	2.8	+53.0%	2%
INDIA	2.8	+114.5%	2%

ADNEC PERFORMANCE

6 HOTELS
1,827 ROOMS



STAR RATING

5 STAR

1 HOTEL
189 ROOMS

4 STAR

2 HOTELS
723 ROOMS

1-3 STAR

2 HOTELS
656 ROOMS

APTS

1 HOTELS
259 ROOMS

PERFORMANCE

Q3 2019

YTD 2019

Key Indicators

Actual

% Change vs
Previous Year

Actual

% Change vs
Previous Year

Guests

80,009

+7.3%

230,088

+12.7%

Occupancy

81%

+17.0%

81%

+13.2%

Revenues (AED)

42 M

+33.5%

143 M

+28.1%

ALOS (Nights)

3.5

+30.4%

3.1

+5.4%

ARR (AED)

223

+16.6%

257

+12.5%

REVPAR (AED)

180

+36.4%

207

+27.4%

TOP NATIONALITIES (000) – Q3 2019

TOP NATIONALITIES (000) – YTD 2019

UAE

32.7

+14.7%

41%

INDIA

4.8

+13.3%

6%

CHINA

3.8

-45.7%

5%

KSA

3.6

-0.1%

4%

PHILIPPINES

3.3

-2.7%

4%

EGYPT

3.2

+23.2%

4%

JORDAN

2.3

-6.6%

3%

PAKISTAN

2.1

-11.5%

3%

UK

2.0

+13.0%

3%

USA

1.9

+50.5%

2%

SYRIA

1.5

+15.9%

2%

UAE

82.4

+8.5%

36%

CHINA

15.5

-2.1%

7%

INDIA

14.6

+19.6%

6%

EGYPT

9.7

+25.6%

4%

PHILIPPINES

9.7

+14.6%

4%

KSA

8.7

+14.5%

4%

JORDAN

6.8

-1.1%

3%

UK

6.8

+23.6%

3%

USA

6.5

+44.2%

3%

PAKISTAN

6.1

+3.7%

3%

SYRIA

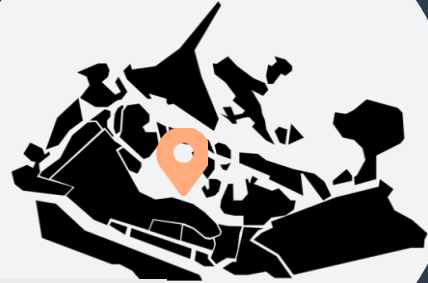
3.6

+0.7%

2%

ABU DHABI ISLAND* PERFORMANCE

119 HOTELS
23,493 ROOMS



STAR RATING

5 STAR

36 HOTELS
11,291 ROOMS

4 STAR

22 HOTELS
4,637 ROOMS

1-3 STAR

22 HOTELS
2,689 ROOMS

APTS

39 HOTELS
4,876 ROOMS

*Includes Corniche, Marina, Bateen, Al Markaziyah, Al Zahiya, Al Maryah Island, Al Reem Island, Al Maqtaa Creek, Al Gurm Corniche, Zayed Sports City and Khalifa City & Raha Beach

PERFORMANCE	Q3 2019		YTD 2019	
	Actual	% Change vs Previous Year	Actual	% Change vs Previous Year
Key Indicators				
Guests	911,760	+0.7%	2,660,454	-0.3%
Occupancy	70%	+3.2%	72%	-0.2%
Revenues (AED)	750 M	-2.2%	2,747 M	+2.2%
ALOS (Nights)	2.5	+3.3%	2.6	+0.9%
ARR (AED)	258	-5.6%	314	+2.8%
REVPAR (AED)	182	-2.5%	227	+2.6%

TOP NATIONALITIES (000) – Q3 2019

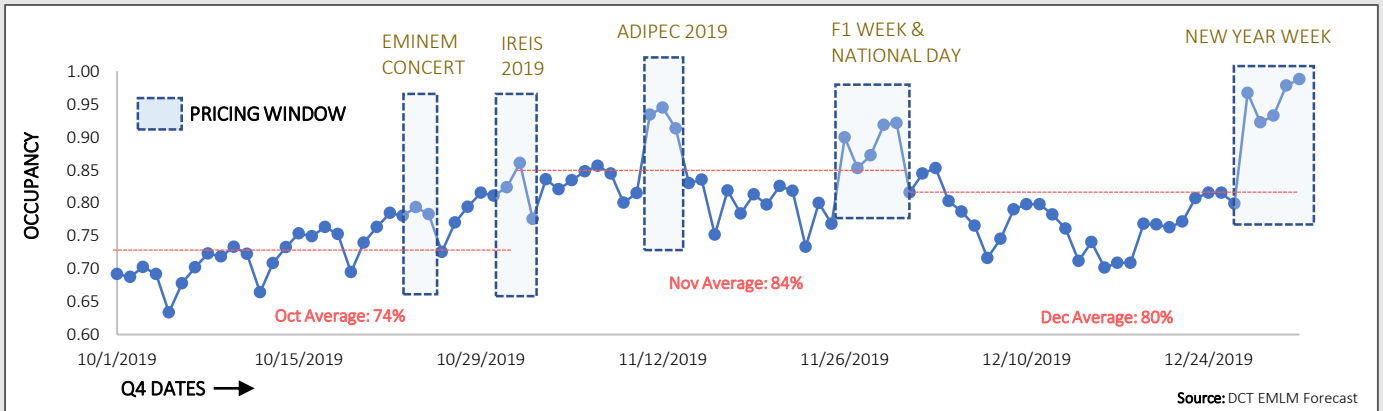
Nationality	Count (000)	% Change	% Share
UAE	276.8	0.0%	30%
INDIA	87.4	+9.7%	10%
CHINA	73.2	+8.6%	8%
UK	41.3	+2.5%	5%
PHILIPPINES	40.7	-9.2%	4%
USA	37.4	-3.7%	4%
EGYPT	36.4	+6.5%	4%
KSA	33.4	-1.1%	4%
PAKISTAN	25.7	+9.2%	3%
JORDAN	23.1	-0.5%	3%
GERMANY	15.1	-10.9%	2%

TOP NATIONALITIES (000) – YTD 2019

Nationality	Count (000)	% Change	% Share
UAE	719.0	-3.0%	27%
CHINA	245.4	0.0%	9%
INDIA	236.8	+3.3%	9%
UK	133.0	-4.6%	5%
USA	119.9	+2.8%	5%
EGYPT	106.2	+10.5%	4%
PHILIPPINES	103.5	-5.5%	4%
KSA	79.1	+1.2%	3%
PAKISTAN	66.9	+8.3%	3%
JORDAN	65.7	+2.6%	2%
GERMANY	62.6	-16.4%	2%

HOTEL FORECAST

PRICING OPPORTUNITIES FOR Q4 2019



Q4 2018 AVERAGE ROOM RATE (ARR AED) – BY STAR RATINGS & ZONES

OCTOBER 2018

NOVEMBER 2018

DECEMBER 2018

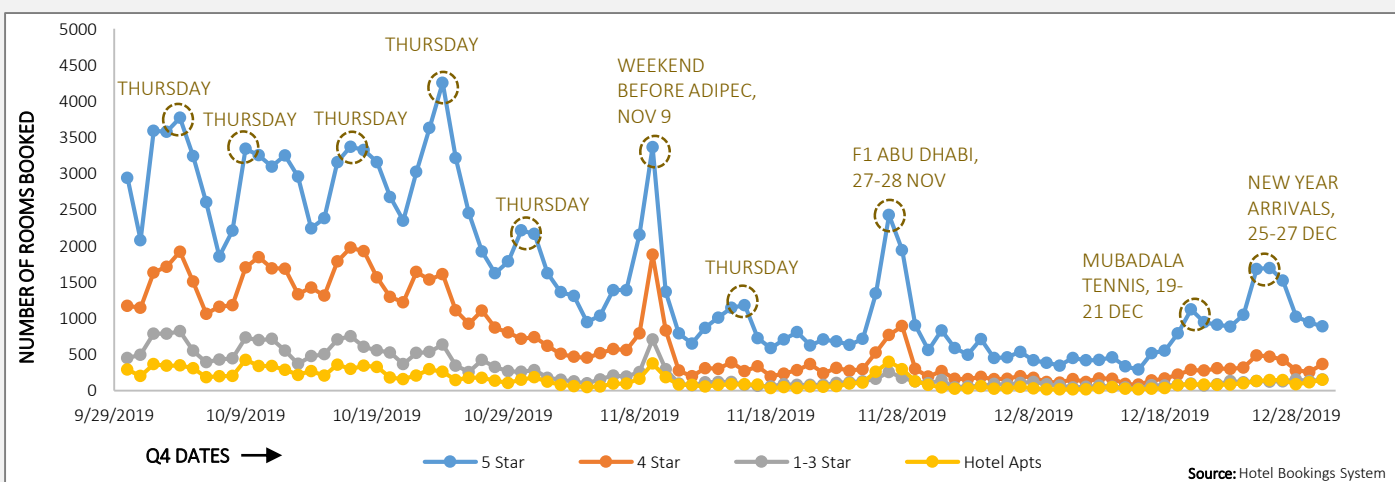
Star Ratings	AD Island	ADNEC	Saadiyat & Niche	Yas Island	AD Average
5 Star	481		1,170		534
4 Star	212	209		320	229
1-3 Star	168	172		240	178
Deluxe	312				311
Standard/ Superior	193				193

Star Ratings	AD Island	ADNEC	Saadiyat & Niche	Yas Island	AD Average
5 Star	644		1,489		756
4 Star	336	442		701	413
1-3 Star	271	316		524	311
Deluxe	368				381
Standard/ Superior	247				247

Star Ratings	AD Island	ADNEC	Saadiyat & Niche	Yas Island	AD Average
5 Star	517		1,385		595
4 Star	243	265		373	268
1-3 Star	204	206		308	218
Deluxe	339				340
Standard/ Superior	215				215

Source: DCT Hotel data

CONFIRMED HOTEL BOOKINGS IN Q4 2019 (AS OF 30th SEPTEMBER 2019)

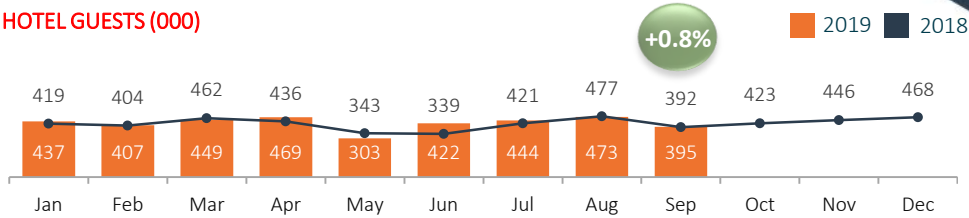


DCT EMLM Forecast: Occupancy forecast is based on DCT's Ensemble Machine Learning Model (EMLM). It is estimated based on year-to-date hotel data and takes into account the major events in the UAE, holiday calendar of UAE and key markets, seasonality trends, one-off events and forward hotel bookings. DCT BI makes no representation or warranty with respect to the forecast delivered. Reader should acknowledge that with respect to any forecast furnished, there are uncertainties inherent in attempting to make any such forecasts. Therefore, the reader should take full responsibility for making its own evaluation of the adequacy and accuracy of all such forecasts.

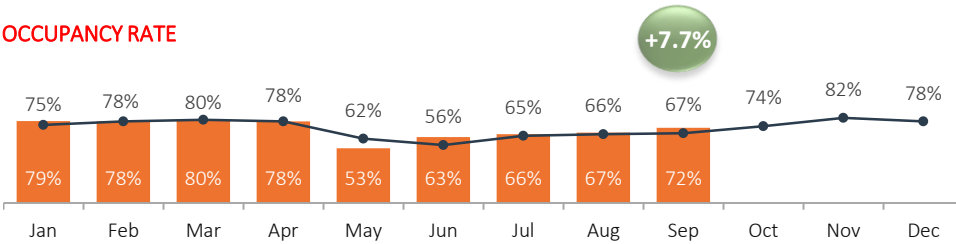
HOTEL KPI

MONTHLY TRENDS

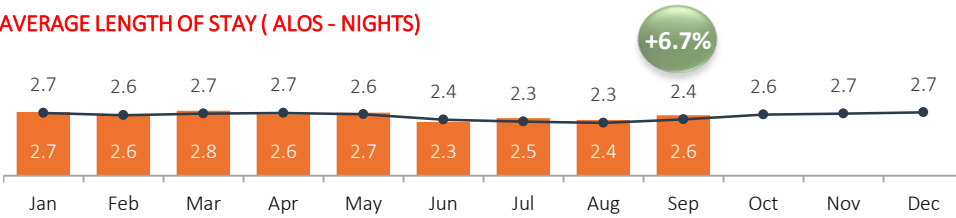
HOTEL GUESTS (000)



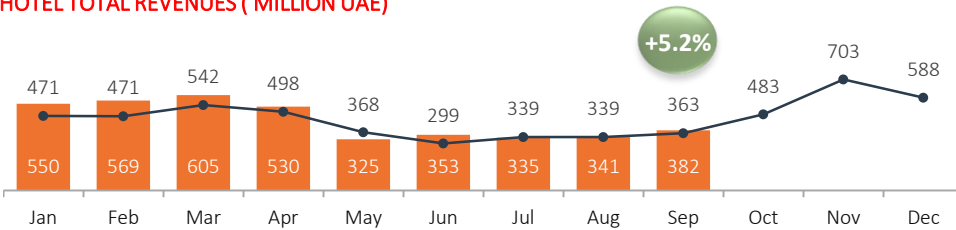
OCCUPANCY RATE



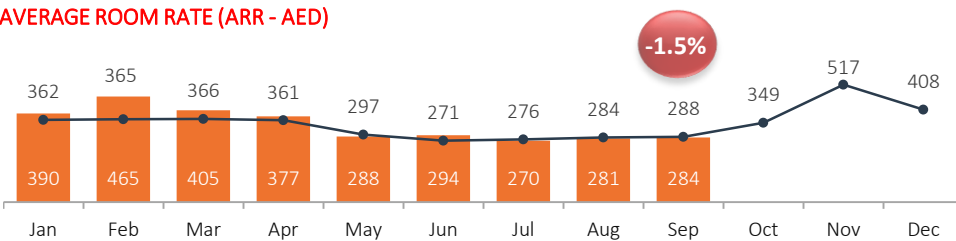
AVERAGE LENGTH OF STAY (ALOS - NIGHTS)



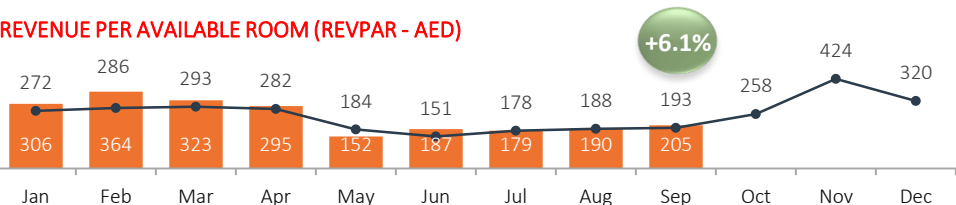
HOTEL TOTAL REVENUES (MILLION UAE)



AVERAGE ROOM RATE (ARR - AED)



REVENUE PER AVAILABLE ROOM (REVPAR - AED)



INTERNATIONAL VISITOR EXPERIENCE

YTD 2019

VISITOR PROFILE

DAY VS. OVERNIGHT VISITORS

52%
SAME DAY

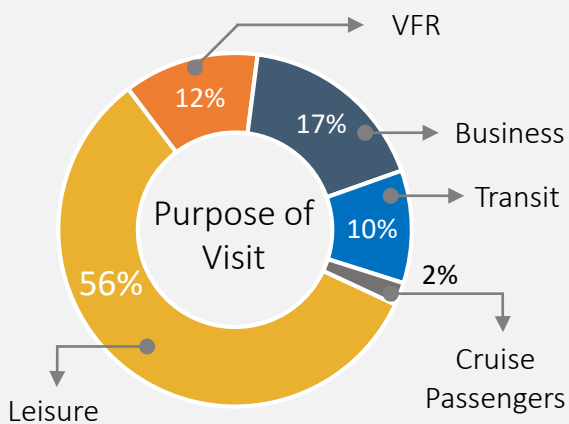
48%
OVERNIGHT

FIRST TIME VS. REPEAT VISITORS

70%
FIRST TIME

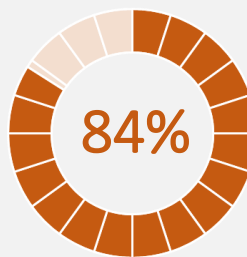
30%
REPEAT VISITOR

PURPOSE OF VISIT

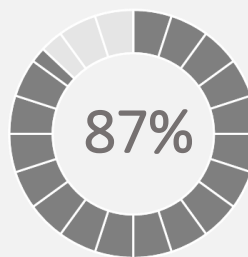


OVERALL REACTIONS WITH ABU DHABI

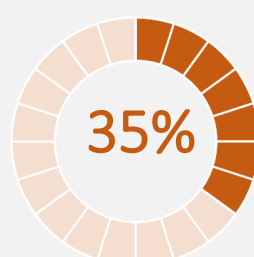
Overall Satisfaction



Willingness to visit again



Net Promoter Score (NPS)



NPS measures visitor loyalty to the event/brand. An NPS that is positive (i.e. higher than zero) is felt to be good, and an NPS of +50 is considered to be excellent.

AVERAGE VISITOR SPEND (USD PER PERSON/DAY)

Spending attributes	Same Day	Overnight
Accommodation	0%	42%
Transportation	27%	10%
F&B	23%	17%
Sites/Attractions	22%	11%
Shopping	28%	20%
Total spend (Per person per day)	USD 123	USD 149

Source: DCT Destination Visitor Survey (2019), based on a sample of visitors

EVENTS

KEY Q3 2019 EVENTS



SUMMER IN ABU DHABI

 24th Jun -3rd Aug

 Across Abu Dhabi



EID AL ADHA CELEBRATIONS

 10th – 13th Aug

 Across Abu Dhabi



AD SHOWDOWN WEEK

 1st -7th Sep

 Yas Island; Across Abu Dhabi

KEY UPCOMING EVENTS – Q4 2019



ENDOUROLOGY CONGRESS

 23th Oct – 2nd Nov

 ADNEC



DU EMINEM CONCERT

 25th Oct

 Yas Island



ADIPEC 2019

 11th -14th Nov

 ADNEC



INTL REAL ESTATE SHOW

 30th OCT – 2nd Nov

 ADNEC



ABU DHABI ART

 21st – 23rd Nov

 Saadiyat Island



F1 ABU DHABI

 28th Nov – 1st Dec

 Yas Island



Mubadala World Tennis

 19th -21st Dec

 Zayed Sports city



BRUNO MARS LIVE

 31st Dec

 Yas Island

GLOSSARY

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.



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