

# Monthly Hotel Establishment Report

March and YTD March, 2017



Dear Hotel Partner,

It gives me great pleasure to share with you some collated highlights from the monthly hotel establishments' performance report for Q1, 2017. Produced by our Business Intelligence team, this report aggregates data supplied by the emirate's hotels and hotel apartments and is prepared at the end of each subsequent month. It is my intention to share this you as a matter of course each month so that we all have a consistent shared view of performance.

By way of background, the data points to performance across a number of primary indicators including nationality of guest arrivals and length of stay and revenues. By drawing on year-to-year and year-to-date comparisons the intelligence can be used as a measure of success as well as identifying opportunities for growth.

I am delighted to advise that, over the first three months of the year, Abu Dhabi has achieved an increase of 4% in guest arrivals when compared to the same period in 2016. This is driven by strong growth in visitor numbers from China and Russia, and supported by double-digit increases from GCC countries notably Kuwait and Qatar. The trends also indicate that primary markets in Europe remain strong, with pressure on visitor growth offset by increases in length of stay, particularly from Germany and Italy. These results are great credit to all your business growth efforts, and to our promotion of Abu Dhabi overall.

We welcome this latest performance as we continue to pursue our target of attracting 4.9 million visitors by the end of 2017. Accelerating this upward trajectory in visitors and addressing the pressures on revenues remain a priority for the year ahead.

By way of brief review, March was a particularly busy month. We took our largest ever delegation to ITB in Germany, and pressed our credentials to the Chinese travel trade at COTTM in Beijing. The second *Mother of the Nation Festival* attracted around 200,000 visitors establishing the popular annual beachfront festival as a top-drawer event appealing to residents and visitors alike.

We also witnessed the opening of the second major exhibition of works from Guggenheim Abu Dhabi, *The Creative Act: Performance, Process, Presence* which runs at Manarat Al Saadiyat until 29 July; a renewed Qasr Al Hosn Exhibition re-opened to the public; and Al Ain's annual programme of events continued with a unique equestrian performance by National Equestrian Academy of Versailles, performed as part of the Emirati-French Cultural Programme initiated by TCA Abu Dhabi and the Institut Français.

And we will continue our ongoing programmes to stimulate visitor interest and demand in the coming months. *Abu Dhabi Sumer Season* presents you with an opportunity to partner with us under an integrated marketing campaign umbrella to highlight your special summer offers. We are leading and preparing for travel trade and MICE missions to China, South Africa, USA and Germany and will roll-out our multi-language *Extraordinary Abu Dhabi* magazine.

With our expanding programme of year-round events, entertainment, attractions and international promotions, we expect to see further trends of growth for Abu Dhabi. I thank you for your efforts and hard work in supporting these initiatives, and look forward to sharing in further success as we progress through 2017.

Should you wish to, I would encourage you to review the information in more detail via our website: <http://tcaabudhabi.ae/en/who.we.are/reports.statistics.aspx>

Yours sincerely,

Saif Saeed Ghobash

Director General

Abu Dhabi Tourism & Culture Authority

# TABLE OF CONTENTS

1	Monthly summary
2	Abu Dhabi Hotel Guests
3	Hospitality Performance
4	Hospitality Performance by Region
5	Hospitality Performance by Rating
6	YTD Monthly summary
7	YTD Abu Dhabi Hotel Guests
8	YTD Hospitality Performance
9	YTD Hospitality Performance by Region
10	YTD Hospitality Performance by Rating
11	Upcoming Events
12	TCA News
13	Glossary

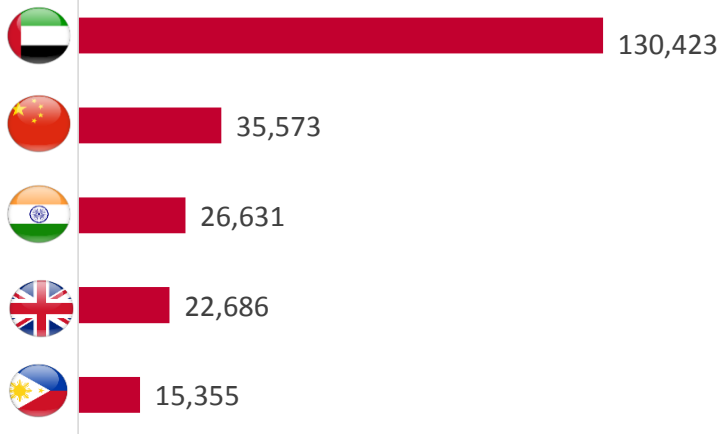


## ABU DHABI HOTEL GUESTS

Hotel Guests

**414,663** ▲ 2%  
vs March 2016

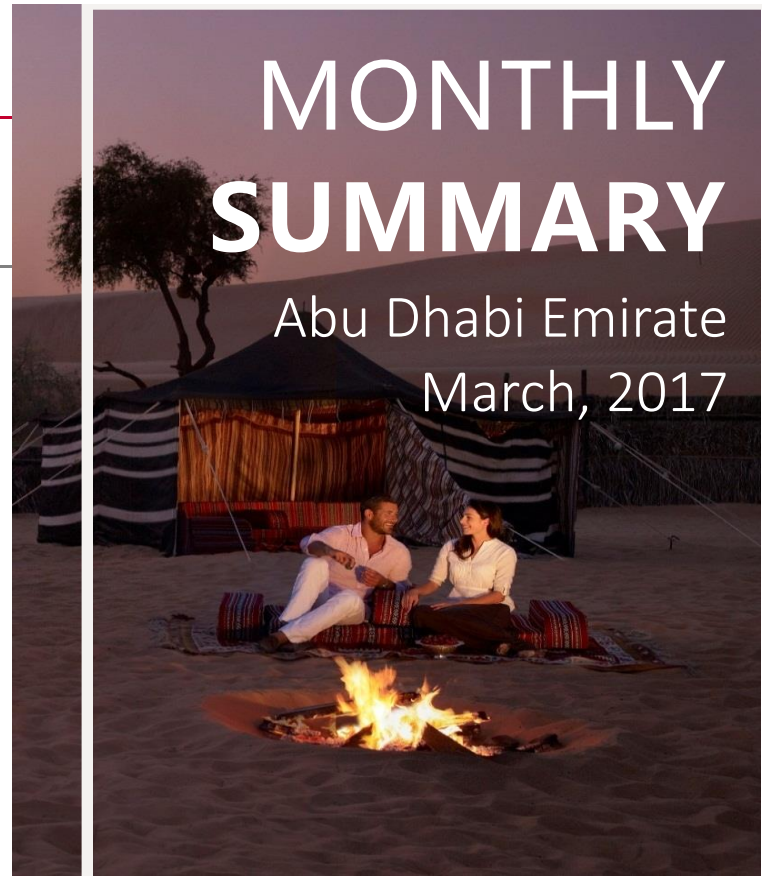
### Top 5 Nationalities (Hotel Guests)



## HOSPITALITY SECTOR PERFORMANCE

Occupancy rate	<b>75%</b>	▼ -10%
Average length of stay	<b>2.6</b> nights	▼ -8%
Revenue per available room	<b>272</b> AED	▼ -24%
Hotel revenues	<b>506</b> MM AED	▼ -19%

For description of the variables, please visit the glossary

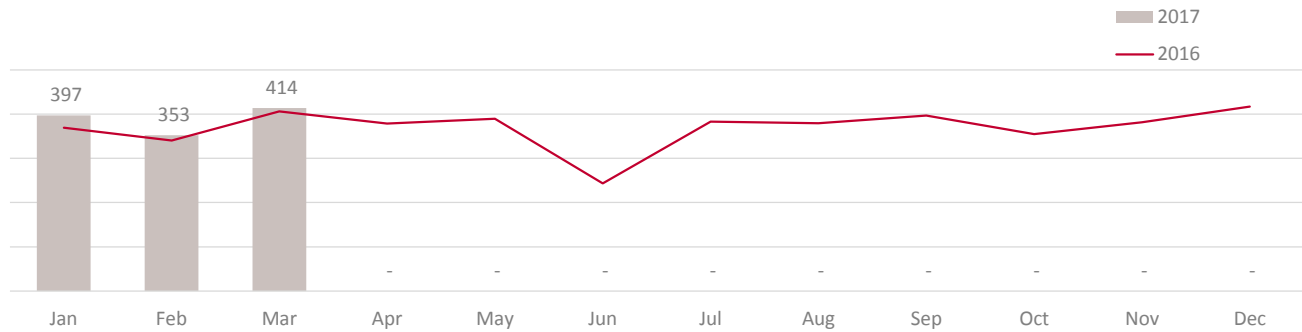


## UPCOMING EVENTS

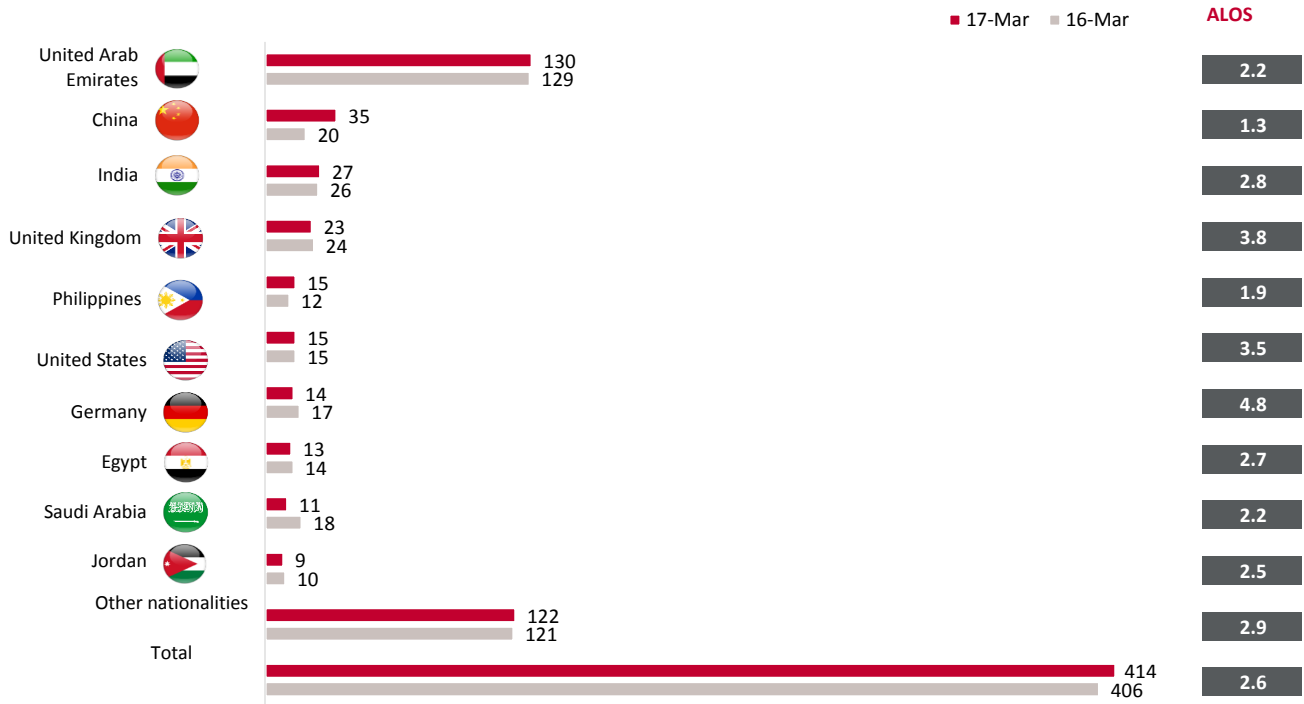
Qasr Al Hosn Exhibition	Mar 03 to Dec 31, 2017 Abu Dhabi
Abu Dhabi International Book Fair 2017	Apr 26 to May 02, 2017 Abu Dhabi National Exhibition Centre
Abu Dhabi Classics 2016 - 2017	Oct 06, 2016 to May 10, 2017 Emirates Palace



### HOTEL GUESTS (thousands)



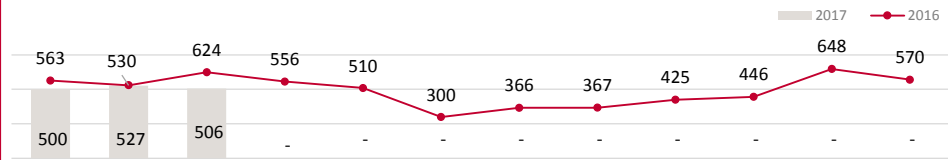
### HOTEL GUESTS BY NATIONALITY (thousands)




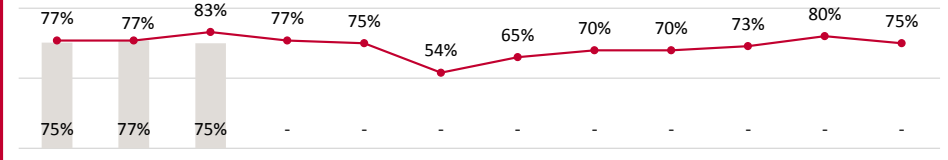
# HOSPITALITY SECTOR PERFORMANCE

## KEY INDICATORS


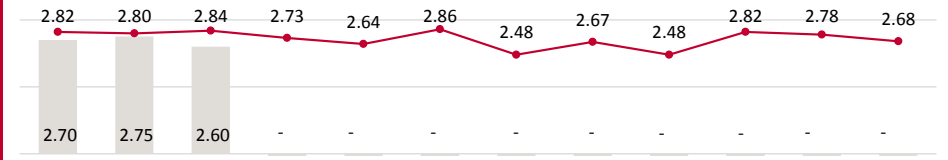
**Revenues,  
M AED**

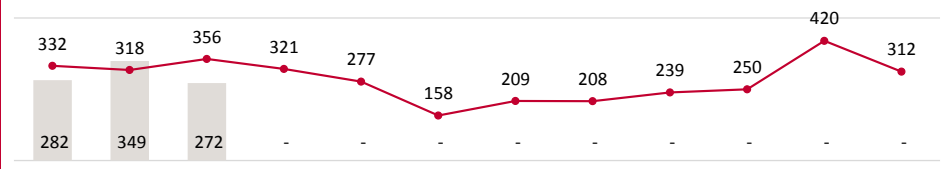
**Occupancy,  
%**

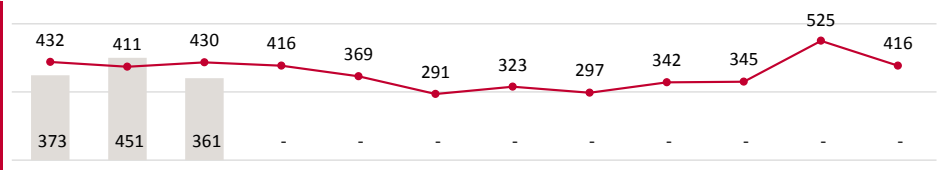
**ALOS,  
days**

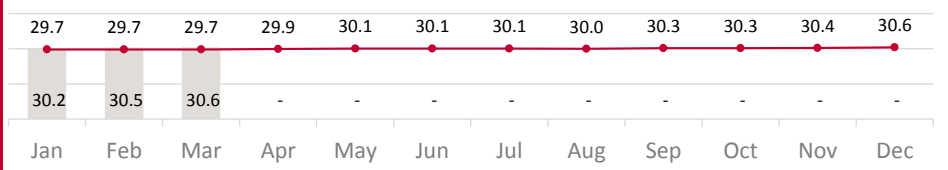
**RevPAR,  
AED**

**ARR,  
AED**

**Av. rooms,  
thousands**

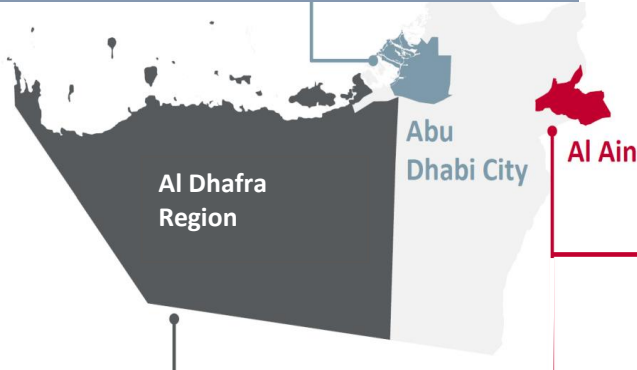
For description of the variables, please visit the glossary

# HOSPITALITY SECTOR PERFORMANCE

## KEY INDICATORS BY REGION

Compared to  
Mar 2016

Actual Guest	364,384	2%	▲
Guest nights	970,061	-7%	▼
ALOS, days	2.66	-9%	▼
Occupancy, %	76%	-10%	▼
Total revenues, M AED	452	-19%	▼
ARR, AED	353	-16%	▼
RevPAR, AED	271	-24%	▼



Actual Guest	38,003	-1%	▼
Guest nights	73,038	-6%	▼
ALOS, days	1.92	-4%	▼
Occupancy, %	67%	-6%	▼
Total revenues, M AED	29	-14%	▼
ARR, AED	342	-10%	▼
RevPAR, AED	228	-16%	▼

Actual Guest	12,276	1%	▲
Guest nights	34,561	-8%	▼
ALOS, days	2.82	-9%	▼
Occupancy, %	62%	-8%	▼
Total revenues, M AED	24	-22%	▼
ARR, AED	604	-20%	▼
RevPAR, AED	377	-26%	▼



# HOSPITALITY

## SECTOR PERFORMANCE

KEY INDICATORS PER HOTEL TYPE

☆☆☆☆☆  
Number of Hotels: 44

Total room capacity 12,288  
Occupancy 71%  
ALOS 2.50 days  
RevPAR 378 AED



☆☆☆☆  
Number of Hotels: 36

Total room capacity 7,141  
Occupancy 80%  
ALOS 2.13 days  
RevPAR 214 AED



☆☆☆  
Number of Hotels: 22

Total room capacity 3,958  
Occupancy 76%  
ALOS 2.30 days  
RevPAR 171 AED



☆☆  
Number of Hotels: 6

Total room capacity 534  
Occupancy 83%  
ALOS 2.29 days  
RevPAR 145 AED



☆  
Number of Hotels: 6

Total room capacity 423  
Occupancy 82%  
ALOS 1.56 days  
RevPAR 156 AED



DELUXE  
Number of Hotel Apartments: 21

Total room capacity 3,467  
Occupancy 81%  
ALOS 6.37 days  
RevPAR 264 AED



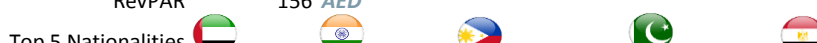
SUPERIOR  
Number of Hotel Apartments: 19

Total room capacity 2,073  
Occupancy 72%  
ALOS 4.81 days  
RevPAR 178 AED



STANDARD  
Number of Hotel Apartments: 13

Total room capacity 733  
Occupancy 74%  
ALOS 3.58 days  
RevPAR 156 AED





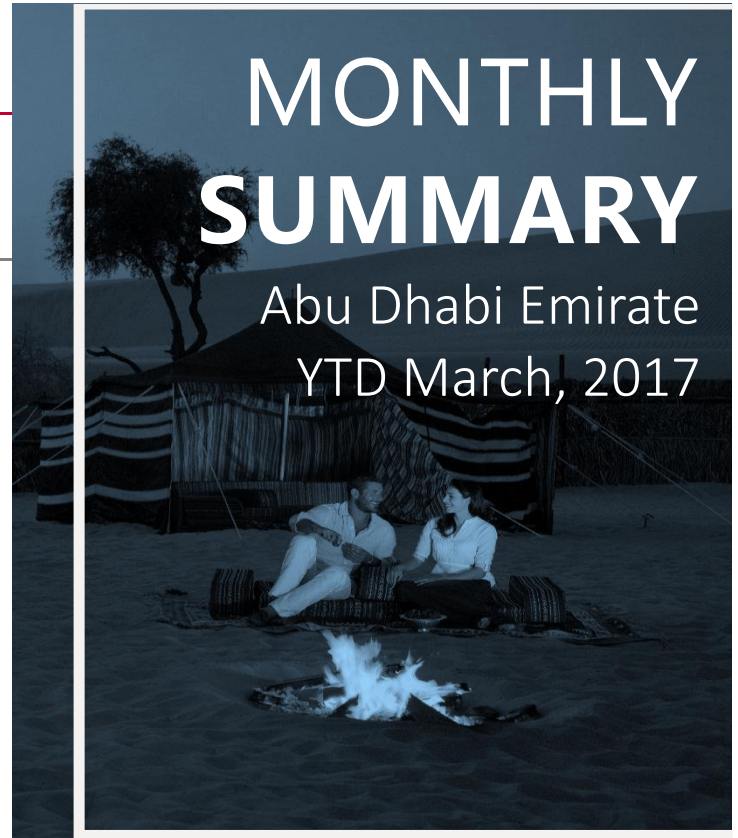
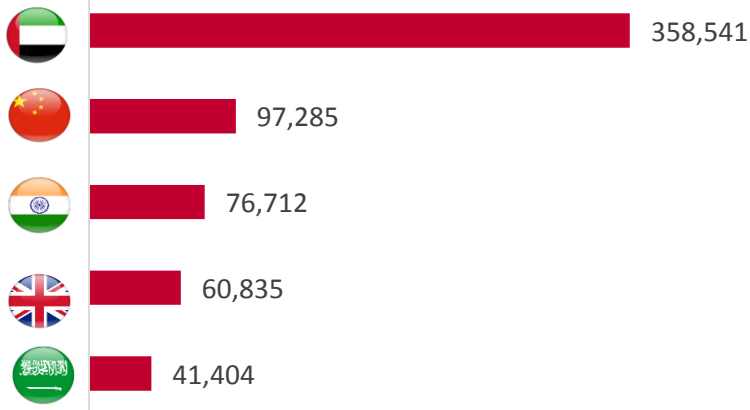
## ABU DHABI HOTEL GUESTS

Hotel Guests

**1,164,313** ▲ 4%

vs YTD March 2016

### Top 5 Nationalities



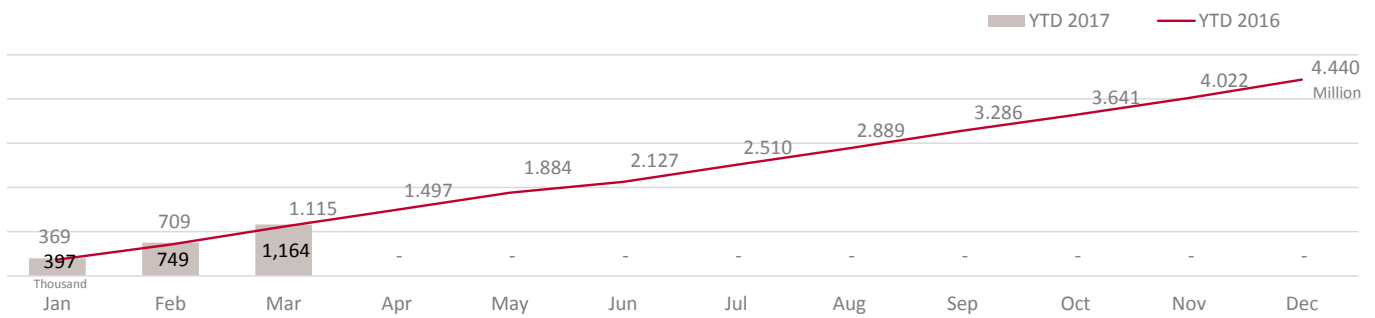
## HOSPITALITY SECTOR PERFORMANCE

Occupancy rate	<b>76%</b>	▼ -4%
Average length of stay	<b>2.7</b> nights	▼ -5%
Revenue per available room	<b>302</b> AED	▼ -10%
Hotel revenues	<b>1.545</b> Billion AED	▼ -10%

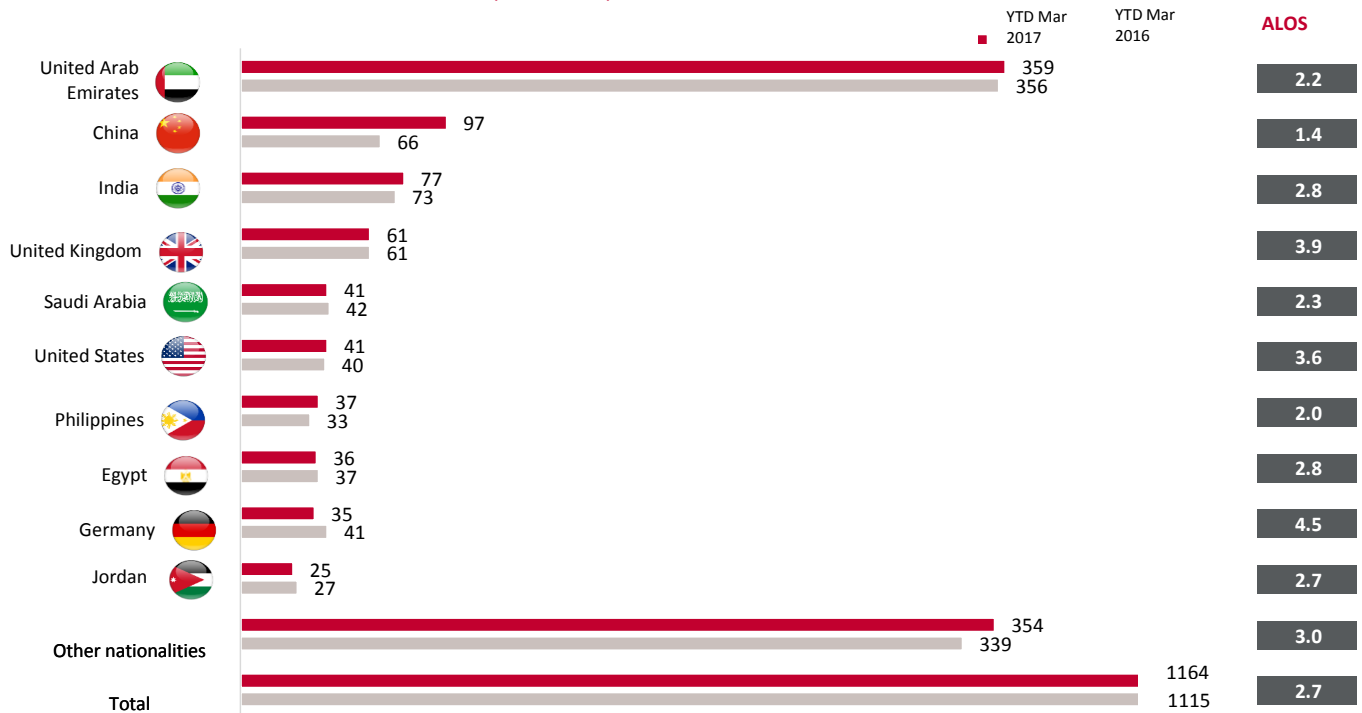
For description of the variables, please visit the glossary

# ABU DHABI HOTEL GUESTS

## HOTEL GUESTS



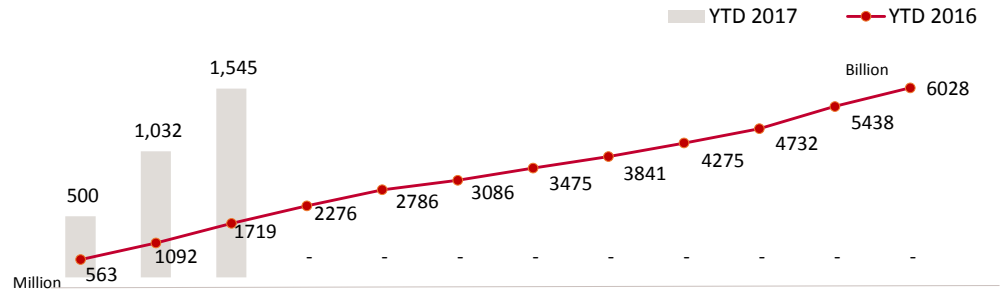
## HOTEL GUESTS BY NATIONALITY (Thousand)



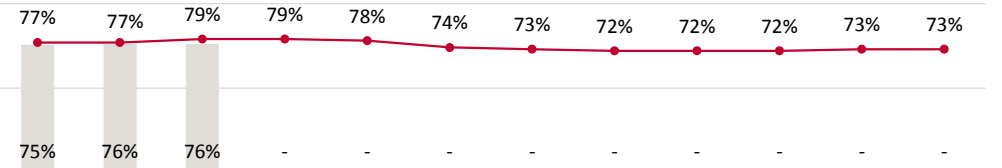
# HOSPITALITY

## SECTOR PERFORMANCE

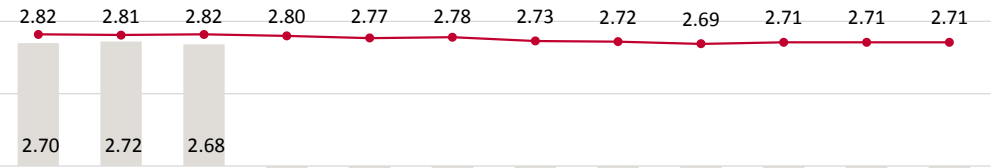
Revenues,  
B AED



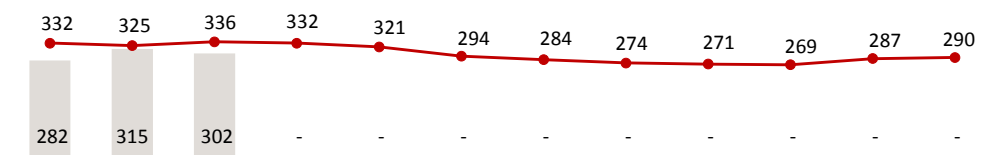
Occupancy,  
%



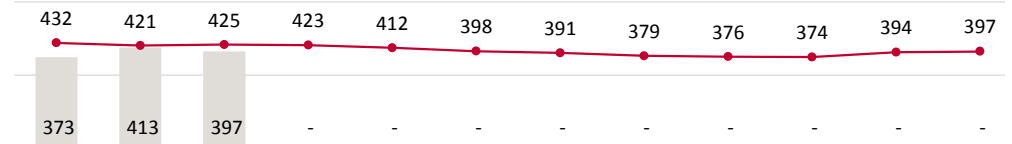
ALOS,  
days



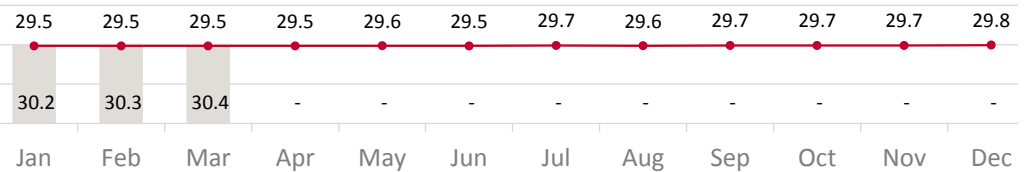
RevPAR,  
AED



ARR,  
AED



Av. rooms,  
thousands

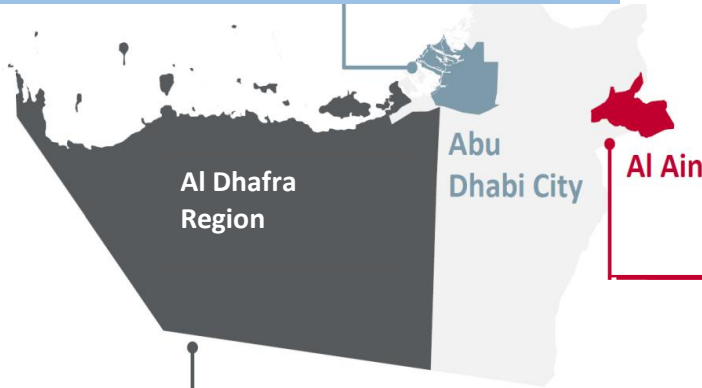


# HOSPITALITY SECTOR PERFORMANCE

## KEY INDICATORS BY REGION

Compared to  
YTD Mar 2016

Actual Guest Arrivals	1,024,802	6% ▲
Guest nights	2,806,024	0% ▲
ALOS, days	2.74	-6% ▼
Occupancy, %	77%	-4% ▼
Total revenues, B AED	1392	-9% ▼
ARR, AED	395	-5% ▼
RevPAR, AED	305	-9% ▼



Actual Guest Arrivals	105,459	-4% ▼
Guest nights	214,392	-7% ▼
ALOS, days	2.03	-4% ▼
Occupancy, %	68%	-6% ▼
Total revenues, M AED	86	-13% ▼
ARR, AED	348	-9% ▼
RevPAR, AED	235	-14% ▼

Actual Guest Arrivals	34,052	-19% ▼
Guest nights	98,711	-7% ▼
ALOS, days	2.90	15% ▲
Occupancy, %	65%	-3% ▼
Total revenues, M AED	65	-27% ▼
ARR, AED	539	-27% ▼
RevPAR, AED	351	-30% ▼

# HOSPITALITY

## SECTOR PERFORMANCE

### KEY INDICATORS PER HOTEL TYPE



Number of  
Hotels: 44

Total room capacity **12,288**  
Occupancy 72%  
ALOS **3.82 days**  
RevPAR 423 **AED**

Top 5 Nationalities     



Number of  
Hotels: 36

Total room capacity **7,141**  
Occupancy 79%  
ALOS **3.43 days**  
RevPAR 236 **AED**

Top 5 Nationalities     



Number of  
Hotels: 22

Total room capacity **3,958**  
Occupancy 78%  
ALOS **2.34 days**  
RevPAR 196 **AED**

Top 5 Nationalities     



Number of  
Hotels: 6

Total room capacity **534**  
Occupancy 85%  
ALOS **2.43 days**  
RevPAR 156 **AED**

Top 5 Nationalities     



Number of  
Hotels: 6

Total room capacity **423**  
Occupancy 81%  
ALOS **1.48 days**  
RevPAR 165 **AED**

Top 5 Nationalities     

#### DELUXE

Number of Hotel  
Apartments: 21

Total room capacity **3,467**  
Occupancy 80%  
ALOS **6.85 days**  
RevPAR 278 **AED**

Top 5 Nationalities     

#### SUPERIOR

Number of  
Hotel  
Apartments: 19


Total room capacity **2,073**  
Occupancy 78%  
ALOS **5.26 days**  
RevPAR 197 **AED**

Top 5 Nationalities     

#### STANDARD

Number of  
Hotel  
Apartments:  
13

Total room capacity **733**  
Occupancy 75%  
ALOS **3.69 days**  
RevPAR 165 **AED**

Top 5 Nationalities     

# UPCOMING EVENTS

May  
2017

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Qasr Al Hosn Exhibition Abu Dhabi	1	Abu Dhabi International Book Fair 2017 Emirates Palace, Abu Dhabi	3	International Jewellery Watch Show Abu Dhabi Abu Dhabi National Exhibition Centre, Abu Dhabi	5	Abu Dhabi Classics 2016 - 2017 Emirates Palace, Abu Dhabi
7	8	9	ATECH World Conference & Exhibition Abu Dhabi National Exhibition Centre, Abu Dhabi	World Game Expo Abu Dhabi National Exhibition Centre, Abu Dhabi	12	Children & Parents World Exhibition Abu Dhabi National Exhibition Centre, Abu Dhabi
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Jun  
2017

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

# TCA NEWS



The revamped **Qasr Al Hosn Exhibition re-opened** to the public showcasing the Qasr Al Hosn 2018 Master Plan. The exhibition offers visitors a journey through the story behind Abu Dhabi, as well as the history of the region surrounding Qasr Al Hosn, and highlights the restoration and conservation development project.



**The Creative Act: Performance, Process, Presence** exhibition, opened at Manarat Al Saadiyat on Saadiyat Island featuring works by more than 25 artists from different nationalities and generations. The Creative Act is the second major exhibition of works from the Guggenheim Abu Dhabi and runs until 29 July 2017.



© Agathe Poupeney / PhotoScene

Directed and choreographed by world-renowned **Bartabas**, an equestrian performance by National Equestrian Academy of Versailles was held over five days at Al Jahili Fort in Al Ain. Presenting a unique equestrian choreography comprising 30 horses was performed as part of the Emirati-French Cultural Programme initiated by TCA Abu Dhabi and the Institut français



The second **Mother of the Nation Festival** drew in more than 197,000 visitors to its programme of over 100 activities, performances, and workshops. The popular annual beachfront festival is a tribute to the far-reaching inspirational values of H.H. Sheikha Fatima Bint Mubarak, celebrating her progressive vision and tireless contributions to society.



# 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