هيئة أبوظبي للسياحة والثقافة
ABU DHABI TOURISM & CULTURE AUTHORITY

Monthly Hotel Establishments Report
Abu Dhabi Emirate

March & Year to Date (January - March)

2016

Abu Dhabi Emitare

Rooms Summary

March 2016	Hotels & Apartments	Rooms (Total Inventory)		Share %
Hotel Establishments	**167**	**29,738**		**100%**
Hotels	**109**	**23,063**		**78%**
5 Star	40	11,103		
4 Star	34	6,957		
3 Star	23	4,046		
2 Star	6	534		
1 Star	6	423		
Hotel Apartments	**58**	**6,675**		**22%**
Deluxe	20	3,351		
Superior	23	2,538		
Standard	15	786		

Hotels Opened during March 2016:

None

Please Note:

Due to an up-grade and down-grade of some hotel establishment classifications during the last month, the total rooms of certain categories have changed. This change has been reflected in the table above.

Abu Dhabi Emirate

Hotel Establishments Executive Summary

March 2016

– March 2016 showed an increase of 15% in guest arrivals when compared to last year, with the total number of hotel guest arrivals at 406,233.

– The number of hotel guest nights increased by 14% to 1,153,469 guest nights in March 2016.

– The average length of stay decreased by 1% in March 2016 (2.84 nights) when compared to last year.

– Hotel occupancy increased by 4% in March 2016 (83%) in comparison to 2015.

– Total revenue for hotel establishments' recorded 1% increase in March 2016 (AED 623 Million), room revenue increased by 2%, while food & beverage revenue decreased by 1.6% only.
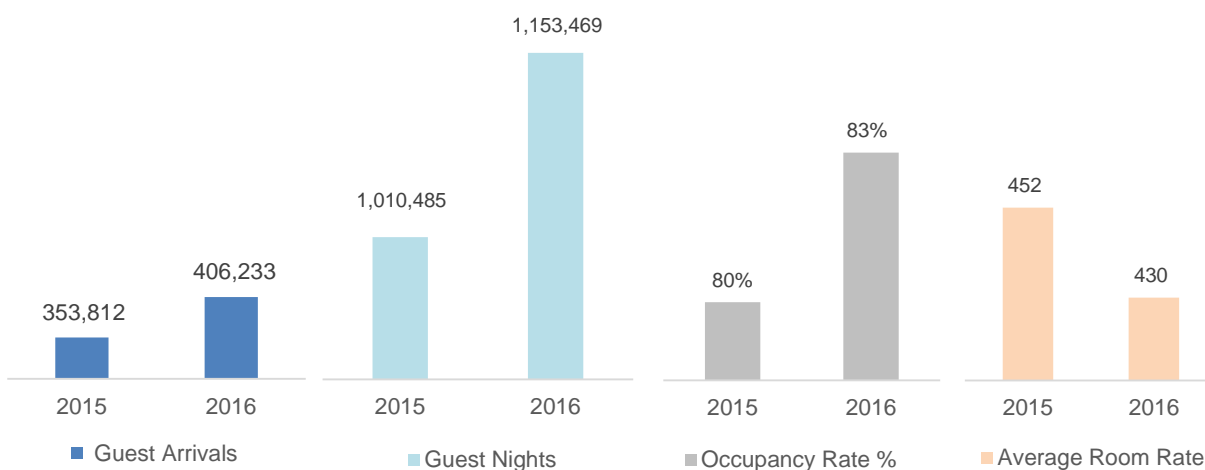
Hotel Establishment Statistics

Abu Dhabi Emirate

Hotel Establishments Main Indicators Summary

March 2016

Indicator	March		
	2016	**2015**	**Growth Rate %**
Actual Guest Arrivals	406,233	353,812	15% ▲
Guest Nights	1,153,469	1,010,485	14% ▲
Room Nights	758,915	697,493	9% ▲
Average Length of Stay	2.84	2.86	-1% ▼
Occupancy Rate %	83%	80%	4% ▲
Room Revenue	326,126,799	321,140,791	2% ▲
Food & Beverages Revenues	219,849,766	223,375,060	-1.6% ▼
Other Revenue	77,804,084	74,381,884	5% ▲
Total Revenue	623,780,649	618,897,735	1% ▲
ARR	430	452	-5% ▼
REV PAR	356	361	-2% ▼
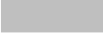
Hotel Establishment Statistics

Abu Dhabi Emirate

Top 10 Nationalities

March 2016

		Share %	Growth%	Guests	Average Length of Stay
1	UAE	32%	13% ▲	128,768	2.26
2	India	7%	40% ▲	26,428	3.35
3	UK	6%	13% ▲	24,487	3.87
4	China	5%	14% ▲	20,158	1.49
5	KSA	4%	2% ▲	17,904	2.38
6	Germany	4%	-12% ▼	16,677	4.40
7	USA	4%	-4% ▼	14,908	4.30
8	Egypt	3%	50% ▲	13,713	2.60
9	Philippines	3%	36% ▲	12,595	2.32
10	Jordan	2%	49% ▲	9,959	2.53

Total Hotel Establishment Guests   **406,233**

Abu Dhabi Emirate

Top 25 Nationalities

March 2016

	Nationality	Guest Arrivals			Guestnights			Average Length of Stay		
		2016	2015	Growth Rate %	2016	2015	Growth Rate %	2016	2015	Growth Rate %
1	UAE	128,768	114,373	13% ▲	291,553	250,256	17% ▲	2.26	2.19	3% ▲
2	India	26,428	18,884	40% ▲	88,416	74,412	19% ▲	3.35	3.94	-15% ▼
3	UK	24,487	21,668	13% ▲	94,880	85,652	11% ▲	3.87	3.95	-2% ▼
4	China	20,158	17,634	14% ▲	30,084	27,164	11% ▲	1.49	1.54	-3% ▼
5	KSA	17,904	17,598	2% ▲	42,635	40,189	6% ▲	2.38	2.28	4% ▲
6	Germany	16,677	19,024	-12% ▼	73,446	71,409	3% ▲	4.40	3.75	17% ▲
7	USA	14,908	15,463	-4% ▼	64,061	63,682	1% ▲	4.30	4.12	4% ▲
8	Egypt	13,713	9,123	50% ▲	35,609	27,691	29% ▲	2.60	3.04	-14% ▼
9	Philippines	12,595	9,268	36% ▲	29,254	20,241	45% ▲	2.32	2.18	6% ▲
10	Jordan	9,959	6,700	49% ▲	25,171	18,762	34% ▲	2.53	2.80	-10% ▼
11	Pakistan	7,676	5,723	34% ▲	18,679	14,827	26% ▲	2.43	2.59	-6% ▼
12	Italy	7,359	5,986	23% ▲	28,664	24,193	18% ▲	3.90	4.04	-4% ▼
13	Syria	6,360	4,662	36% ▲	12,746	9,959	28% ▲	2.00	2.14	-6% ▼
14	France	6,295	6,849	-8% ▼	21,888	21,212	3% ▲	3.48	3.10	12% ▲
15	Oman	4,919	4,417	11% ▲	7,901	7,945	-1% ▼	1.61	1.80	-11% ▼
16	Lebanon	4,477	3,053	47% ▲	12,804	9,787	31% ▲	2.86	3.21	-11% ▼
17	Australia	3,677	2,964	24% ▲	13,238	11,065	20% ▲	3.60	3.73	-4% ▼
18	Canada	3,644	3,582	2% ▲	14,298	13,460	6% ▲	3.92	3.76	4% ▲
19	Ireland	3,292	2,321	42% ▲	10,309	8,194	26% ▲	3.13	3.53	-11% ▼
20	Morocco	2,684	1,482	81% ▲	6,983	4,530	54% ▲	2.60	3.06	-15% ▼
21	Palestine	2,611	1,656	58% ▲	4,752	3,346	42% ▲	1.82	2.02	-10% ▼
22	Switzerland	2,372	2,257	5% ▲	8,777	8,120	8% ▲	3.70	3.60	3% ▲
23	Qatar	2,365	2,040	16% ▲	4,756	4,743	0.3% ▲	2.01	2.33	-14% ▼
24	South Africa	2,306	1,734	33% ▲	7,966	6,550	22% ▲	3.45	3.78	-9% ▼
25	Russia	2,200	3,206	-31% ▼	11,323	11,827	-4% ▼	5.15	3.69	40% ▲

Abu Dhabi Emirate

Hotel Establishments Executive Summary

Year To Date (January - March) 2016

–   The number of guests showed an increase of 11% in year to date (January - March) 2016 when compared to last year, with the total number of hotel guest arrivals at 1,115,547.

–   The number of hotel guest nights increased by 10% to 3,147,754 guest nights .

–   The average length of stay for year to date decreased by 2% in comparison to same period of 2015.

–   Hotel occupancy decreased by 0.4% only (79%) in comparison to last year.

–   Total revenue for hotel establishments recorded 6% decrease (AED 1,719 Billion), room revenue decreased by 9%, while food & beverage revenue decreased by 3% only.

Hotel Establishment Statistics

Abu Dhabi Emirate

Hotel Establishments Main Indicators Summary

Year To Date (January - March) 2016

Indicator	Year To Date (January - March)		
	2016	**2015**	**Growth Rate %**
Actual Guest Arrivals	1,115,547	1,001,109	11% ▲
Guest Nights	3,147,754	2,873,237	10% ▲
Room Nights	2,106,490	1,997,558	5% ▲
Average Length of Stay	2.82	2.87	-2% ▼
Occupancy Rate %	79.0%	79.3%	-0.4% ▼
Room Revenue	904,584,076	991,965,510	-9% ▼
Food & Beverages Revenues	603,362,485	621,418,022	-3% ▼
Other Revenue	211,380,796	206,182,002	3% ▲
Total Revenue	1,719,327,357	1,819,565,534	-6% ▼
ARR	425	485	-12% ▼
REV PAR	336	385	-13% ▼
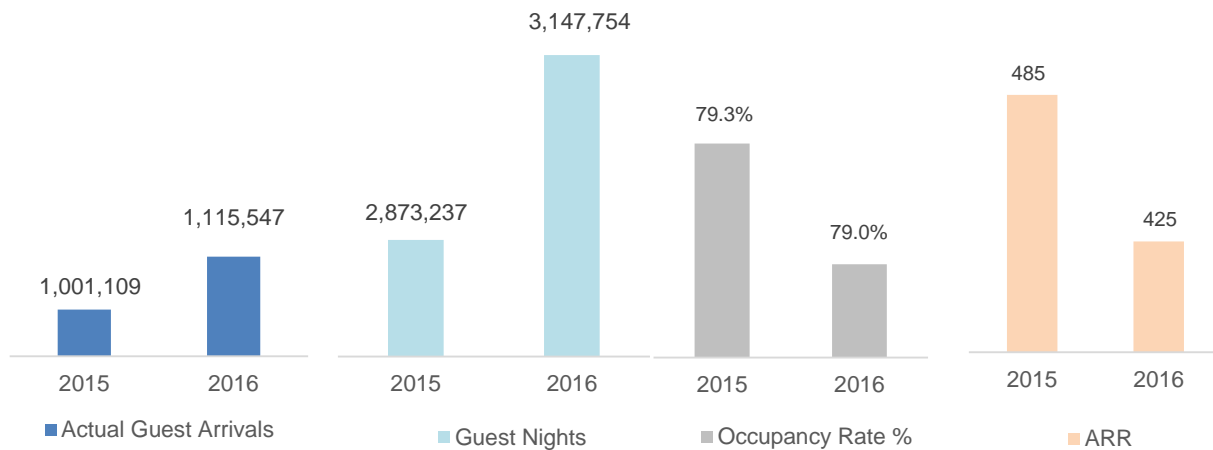
Hotel Establishment Statistics

Abu Dhabi Emirate

Top 10 Nationalities

Year To Date (January - March) 2016

		Share %	Growth%	Guests	Average Length of Stay
1	UAE	32%	11% ▲	355,651	2.25
2	India	7%	31% ▲	73,492	3.42
3	China	6%	3% ▲	65,713	1.43
4	UK	5%	6% ▲	61,100	4.06
5	KSA	4%	6% ▲	41,712	2.41
6	Germany	4%	-9% ▼	41,206	4.25
7	USA	4%	-5% ▼	40,546	4.35
8	Egypt	3%	36% ▲	37,314	2.69
9	Philippines	3%	26% ▲	33,255	2.25
10	Jordan	2%	39% ▲	26,657	2.70

Total Hotel Establishment Guests   **1,115,547**

Hotel Establishment Statistics

Abu Dhabi Emirate

Top 25 Nationalities

Year To Date (January - March) 2016

Rank	Nationality	Guest Arrivals			Guestnights			Average Length of Stay		
		2016	2015	Growth Rate %	2016	2015	Growth Rate %	2016	2015	Growth Rate %
1	UAE	355,651	319,409	11% ▲	800,651	739,036	8% ▲	2.25	2.31	-3% ▼
2	India	73,492	56,000	31% ▲	251,498	215,110	17% ▲	3.42	3.84	-11% ▼
3	China	65,713	64,098	3% ▲	93,768	91,449	3% ▲	1.43	1.43	##### ▲
4	UK	61,100	57,676	6% ▲	248,311	235,551	5% ▲	4.06	4.08	-0.5% ▼
5	KSA	41,712	39,285	6% ▲	100,728	87,664	15% ▲	2.41	2.23	8% ▲
6	Germany	41,206	45,357	-9% ▼	175,154	178,455	-2% ▼	4.25	3.93	8% ▲
7	USA	40,546	42,544	-5% ▼	176,476	177,717	-1% ▼	4.35	4.18	4% ▲
8	Egypt	37,314	27,443	36% ▲	100,222	79,025	27% ▲	2.69	2.88	-7% ▼
9	Philippines	33,255	26,325	26% ▲	74,744	57,423	30% ▲	2.25	2.18	3% ▲
10	Jordan	26,657	19,237	39% ▲	72,013	56,504	27% ▲	2.70	2.94	-8% ▼
11	Pakistan	21,346	16,852	27% ▲	52,024	44,527	17% ▲	2.44	2.64	-8% ▼
12	France	20,735	17,882	16% ▲	65,852	59,020	12% ▲	3.18	3.30	-4% ▼
13	Italy	19,833	16,097	23% ▲	77,008	66,898	15% ▲	3.88	4.16	-7% ▼
14	Oman	17,126	16,381	5% ▲	27,811	27,572	1% ▲	1.62	1.68	-4% ▼
15	Syria	16,198	12,736	27% ▲	37,274	26,243	42% ▲	2.30	2.06	12% ▲
16	Australia	12,052	10,328	17% ▲	39,558	35,817	10% ▲	3.28	3.47	-5% ▼
17	Lebanon	11,076	8,376	32% ▲	34,198	26,899	27% ▲	3.09	3.21	-4% ▼
18	Canada	9,432	9,972	-5% ▼	39,628	37,066	7% ▲	4.20	3.72	13% ▲
19	Ireland	9,048	5,768	57% ▲	25,032	21,664	16% ▲	2.77	3.76	-26% ▼
20	Qatar	7,881	7,136	10% ▲	16,089	15,344	5% ▲	2.04	2.15	-5% ▼
21	Morocco	7,133	4,623	54% ▲	19,726	15,442	28% ▲	2.77	3.34	-17% ▼
22	Palestine	6,704	4,931	36% ▲	12,495	9,615	30% ▲	1.86	1.95	-4% ▼
23	Switzerland	6,638	6,630	0% ▲	23,621	23,685	-0.3% ▼	3.56	3.57	-0.4% ▼
24	South Africa	6,549	4,969	32% ▲	22,573	20,086	12% ▲	3.45	4.04	-15% ▼
25	Russia	6,508	8,502	-23% ▼	33,964	36,476	-7% ▼	5.22	4.29	22% ▲

Hotel Establishment Statistics

هيئة أبوظبي للسياحة والثقافة
ABU DHABI TOURISM & CULTURE AUTHORITY

Regional Summary

Abu Dhabi City

Indicator	March			Year To Date (January - March)		
	2016	**2015**	**Growth Rate %**	**2016**	**2015**	**Growth Rate %**
Actual Guest Arrivals	355,707	304,331	17% ▲	964,722	856,156	13% ▲
Guest Nights	1,038,577	903,905	15% ▲	2,810,638	2,558,247	10% ▲
Average Length of Stay	2.92	2.97	-2% ▼	2.91	2.99	-3% ▼
Occupancy %	84%	81%	4% ▲	80.1%	80.4%	-0.4% ▼
Total Revenue	558,554,266	553,282,094	1% ▲	1,529,836,163	1,628,126,570	-6% ▼
ARR	422	444	-5% ▼	417	480	-13% ▼
REV PAR	356	361	-1% ▼	334	386	-14% ▼

Rooms Summary

March 2016	Hotels & Apartments	Rooms (Total Inventory)		Share %
Hotel Establishments	**138**	**26,394**		**100%**
Hotels	**85**	**20,164**		**76%**
5 Star	31	9,930		
4 Star	25	5,943		
3 Star	18	3,396		
2 Star	6	534		
1 Star	5	361		
Hotel Apartments	**53**	**6,230**		**24%**
Deluxe	20	3,351		
Superior	20	2,201		
Standard	13	678		

Hotel Establishment Statistics

Regional Summary

Al Ain City

Indicator	March			Year To Date (January - March)		
	2016	2015	Growth Rate %	2016	2015	Growth Rate %
Actual Guest Arrivals	38,387	35,814	7% ▲	108,814	112,523	-3% ▼
Guest Nights	77,306	74,935	3% ▲	230,746	223,294	3% ▲
Average Length of Stay	2.01	2.09	-4% ▼	2.12	1.98	7% ▲
Occupancy %	71%	72%	-1% ▼	72.2%	71.9%	0.4% ▲
Total Revenue	33,798,943	35,355,268	-4% ▼	99,410,414	102,607,909	-3% ▼
ARR	383	389	-2% ▼	381	395	-4% ▼
REV PAR	271	278	-2% ▼	275	284	-3% ▼

Rooms Summary

March 2016	Hotels & Apartments	Rooms (Total Inventory)		Share %
Hotel Establishments	**18**	**2,164**		**100%**
Hotels	**13**	**1,719**		**79%**
5 Star	4	735		
4 Star	7	798		
3 Star	1	124		
2 Star	-	-		
1 Star	1	62		
Hotel Apartments	**5**	**445**		**21%**
Deluxe	-	-		
Superior	3	337		
Standard	2	108		

Hotel Establishment Statistics

Regional Summary

Western Region

Indicator	March			Year To Date (January - March)		
	2016	2015	Growth Rate %	2016	2015	Growth Rate %
Actual Guest Arrivals	12,139	13,667	-11% ▼	42,011	32,430	30% ▲
Guest Nights	37,586	31,645	19% ▲	106,370	91,696	16% ▲
Average Length of Stay	3.1	2.32	34% ▲	2.53	2.83	-11% ▼
Occupancy %	68%	65%	5% ▲	67.4%	67.2%	0.4% ▲
Total Revenue	31,427,439	30,260,374	4% ▲	90,080,781	88,831,055	1% ▲
ARR	750	842	-11% ▼	739	843	-12% ▼
REV PAR	509	545	-7% ▼	498	566	-12% ▼

Rooms Summary

March 2016	Hotels & Apartments	Rooms (Total Inventory)	Share %
Hotel Establishments	11	1,180	100%
Hotels	11	1,180	100%
5 Star	5	438	
4 Star	2	216	
3 Star	4	526	
2 Star	-	-	
1 Star	-	-	
Hotel Apartments	-	-	0%
Deluxe	-	-	
Superior	-	-	
Standard	-	-	

Actual Guest arrivals:

The number of registered guest arrivals (checked-in) including those who occupied complimentary or non-revenue generating rooms either for day-stay or overnight stay.

Guest nights:
The number of nights all guests spent in the hotel regardless of the type of rooms they occupy (single, double, twin, suite, etc)

Room nights:
The number of nights a guestroom is occupied regardless of the number of persons occupying the room.

Total Hotel Inventory:
The total hotel room inventory or hotel room capacity which include all rooms that are available for sale, out-of-order rooms, out-of-service rooms and those utilized for 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.)

Occupied Rooms:
Number of rooms used daily including complimentary and house use.

Room revenue:
The revenue generated by the hotel by the sold rooms including service charge and taxes.

Food and beverage revenue:
The revenue generated by the Hotel from Restaurants, F&B room service and other activities related to food services including service charge and taxes.

Other revenue:
Other services generated by the hotel that falls outside the room revenue and food & beverage revenue category including service charge and taxes.

Total revenue:

The revenue generated by the hotel from all its operation including service charge and taxes.

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 rooms sold. Also called average daily rate or ADR.

(Note: Should be based on paid rooms only) excluding complimentary and house use but including service charge)

RevPAR:
A calculation used in the hotel industry that measures revenue per available room (total rooms in hotel minus out of service rooms)

Hotel Establishment Statistics

Contacts

Market Intelligence Team

Sabha Al Ameri

Market Intelligence Section Manager

sameri@tcaabudhabi.ae

+971 2 5995233

Noura Al Kaabi

Senior Data & Statistics Analyst

NRKaabi@tcaabudhabi.ae

+971 2 5995711

Shaheera Al Rashedi

Data & Statistics Analyst

SERashedi@tcaabudhabi.ae

+971 2 5995376