

Monthly Hotel Establishment Report Abu Dhabi Emirate

February 2016

2016





Hotel Establishment Statistics

Abu Dhabi Emirate

Rooms Summary

| February 2016 | Hotels & Apartments | Rooms (Total) | Share % |
|-----------------------------|---------------------|---------------|-------------|
| Hotel Establishments | 167 | 29,688 | 100% |
| Hotels | 109 | 23,063 | 78% |
| 5 Star | 39 | 10,785 | |
| 4 Star | 35 | 7,275 | |
| 3 Star | 21 | 3,788 | |
| 2 Star | 9 | 855 | |
| 1 Star | 5 | 360 | |
| Hotel Apartments | 58 | 6,625 | 22% |
| Deluxe | 20 | 3,301 | |
| Superior | 23 | 2,538 | |
| Standard | 15 | 786 | |

Hotels closed during February 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. In addition, one hotel have amended the total number of rooms available as part of their inventory. This change has also been reflected in the table above.

Hotel Establishment Statistics

Abu Dhabi Emirate

Hotel Establishments Executive Summary

February 2016

- February 2016 showed an increase of 10% in guest arrivals when compared to last year, with the total number of hotel guest arrivals at 340,043.
- The number of hotel guest nights increased by 8% to 951,350 guest nights in February 2016.
- The average length of stay decreased by 2% in February 2016 (2.8 nights) when compared to last year.
- Hotel occupancy for February 2016 decreased by 5% (77%) in comparison to February 2015.
- Total revenue for hotel establishments' recorded 16% decrease in February 2016 (AED 529 Million), room revenue decreased by 24%, while food & beverage revenue decreased by 7%.



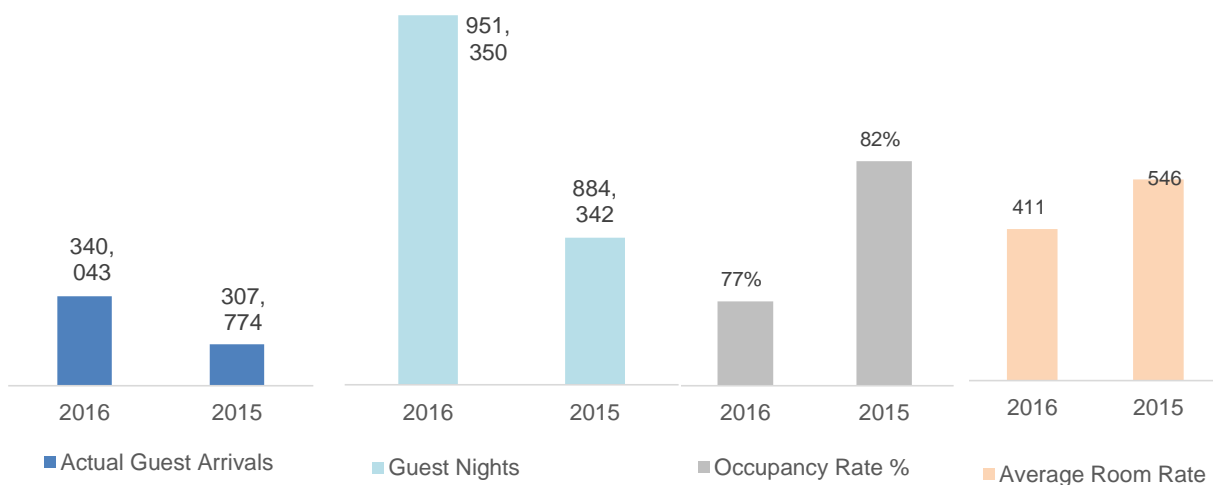
Hotel Establishment Statistics

Abu Dhabi Emirate

Hotel Establishments Main Indicators Summary

February 2016

| Indicator | Month of February | | |
|------------------------|-------------------|-------------|---------------|
| | 2016 | 2015 | Growth Rate % |
| Actual Guest Arrivals | 340,043 | 307,774 | 10% ▲ |
| Guest Nights | 951,350 | 884,342 | 8% ▲ |
| Room Nights | 649,264 | 626,228 | 4% ▲ |
| Average Length of Stay | 2.80 | 2.87 | -2% ▼ |
| Occupancy Rate % | 77% | 82% | -5% ▼ |
| Room Revenue | 273,099,065 | 358,311,378 | -24% ▼ |
| Food & Beverages | 190,665,152 | 204,292,087 | -7% ▼ |
| Other Revenue | 65,849,069 | 66,438,228 | -1% ▼ |
| Total Revenue | 529,613,287 | 629,041,694 | -16% ▼ |
| ARR | 411 | 546 | -25% ▼ |
| REV PAR | 318 | 446 | -29% ▼ |























Hotel Establishment Statistics

Abu Dhabi Emirate

Top 10 Nationalities

February 2016

| | | Share % | Growth % | Guests | Average Length of Stay |
|----|-------------|---------|----------|--|--|
| 1 | UAE | 31% | 11% ▲ |  105,103 |  2.24 |
| 2 | China | 7% | -4% ▼ |  24,902 |  1.39 |
| 3 | India | 7% | 37% ▲ |  22,789 |  3.46 |
| 4 | UK | 6% | 5% ▲ |  19,751 |  4.07 |
| 5 | Germany | 4% | -11% ▼ |  12,404 |  4.11 |
| 6 | Egypt | 4% | 35% ▲ |  11,935 |  2.79 |
| 7 | US | 3% | -16% ▼ |  11,577 |  4.68 |
| 8 | Philippines | 3% | 24% ▲ |  10,544 |  2.19 |
| 9 | Jordan | 2% | 46% ▲ |  8,242 |  2.71 |
| 10 | France | 2% | 32% ▲ |  7,769 |  2.90 |

Total Hotel Establishment Guests 340,043



Hotel Establishment Statistics

Abu Dhabi Emirate

Top 25 Nationalities

February 2016

| Nationality | Guest Arrivals | | | Guestnights | | | Average Length of Stay | | |
|--------------------------|----------------|--------|---------------|-------------|---------|---------------|------------------------|------|---------------|
| | 2016 | 2015 | Growth Rate % | 2016 | 2015 | Growth Rate % | 2016 | 2015 | Growth Rate % |
| 1 UAE | 105,103 | 94,279 | 11% ▲ | 235,333 | 226,668 | 4% ▲ | 2.24 | 2.40 | -7% ▼ |
| 2 China | 24,902 | 25,969 | -4% ▼ | 34,503 | 34,689 | -1% ▼ | 1.39 | 1.34 | 4% ▲ |
| 3 India | 22,789 | 16,657 | 37% ▲ | 78,892 | 65,396 | 21% ▲ | 3.46 | 3.93 | -12% ▼ |
| 4 UK | 19,751 | 18,800 | 5% ▲ | 80,373 | 76,757 | 5% ▲ | 4.07 | 4.08 | 0% ▼ |
| 5 Germany | 12,404 | 13,927 | -11% ▼ | 51,035 | 53,257 | -4% ▼ | 4.11 | 3.82 | 8% ▲ |
| 6 Egypt | 11,935 | 8,822 | 35% ▲ | 33,316 | 24,571 | 36% ▲ | 2.79 | 2.79 | 0% ▲ |
| 7 US | 11,577 | 13,773 | -16% ▼ | 54,143 | 57,626 | -6% ▼ | 4.68 | 4.18 | 12% ▲ |
| 8 Philippines | 10,544 | 8,470 | 24% ▲ | 23,116 | 18,863 | 23% ▲ | 2.19 | 2.23 | -2% ▼ |
| 9 Jordan | 8,242 | 5,662 | 46% ▲ | 22,321 | 16,236 | 37% ▲ | 2.71 | 2.87 | -6% ▼ |
| 10 France | 7,769 | 5,874 | 32% ▲ | 22,548 | 19,074 | 18% ▲ | 2.90 | 3.25 | -11% ▼ |
| 11 KSA | 7,500 | 7,154 | 5% ▲ | 16,761 | 15,902 | 5% ▲ | 2.23 | 2.22 | 1% ▲ |
| 12 Pakistan | 6,500 | 5,245 | 24% ▲ | 16,033 | 14,511 | 10% ▲ | 2.47 | 2.77 | -11% ▼ |
| 13 Italy | 5,915 | 4,730 | 25% ▲ | 21,832 | 19,170 | 14% ▲ | 3.69 | 4.05 | -9% ▼ |
| 14 Oman | 5,338 | 5,076 | 5% ▲ | 8,843 | 8,454 | 5% ▲ | 1.66 | 1.67 | -1% ▼ |
| 15 Syria | 4,832 | 3,625 | 33% ▲ | 10,925 | 7,632 | 43% ▲ | 2.26 | 2.11 | 7% ▲ |
| 16 Lebanon | 3,489 | 2,704 | 29% ▲ | 10,653 | 8,283 | 29% ▲ | 3.05 | 3.06 | 0% ▼ |
| 17 Australia | 3,114 | 2,824 | 10% ▲ | 11,008 | 10,069 | 9% ▲ | 3.54 | 3.57 | -1% ▼ |
| 18 Ireland | 2,867 | 1,639 | 75% ▲ | 7,111 | 6,534 | 9% ▲ | 2.48 | 3.99 | -38% ▼ |
| 19 Canada | 2,858 | 2,994 | -5% ▼ | 12,233 | 11,367 | 8% ▲ | 4.28 | 3.80 | 13% ▲ |
| 20 Qatar | 2,531 | 2,282 | 11% ▲ | 5,001 | 4,739 | 6% ▲ | 1.98 | 2.08 | -5% ▼ |
| 21 Switzerland | 2,415 | 2,452 | -2% ▼ | 8,260 | 8,910 | -7% ▼ | 3.42 | 3.63 | -6% ▼ |
| 22 Morocco | 2,297 | 1,604 | 43% ▲ | 6,530 | 4,930 | 32% ▲ | 2.84 | 3.07 | -8% ▼ |
| 23 Netherlands (Holland) | 2,243 | 2,114 | 6% ▲ | 9,175 | 7,462 | 23% ▲ | 4.09 | 3.53 | 16% ▲ |
| 24 Palestine | 2,003 | 1,562 | 28% ▲ | 3,841 | 2,864 | 34% ▲ | 1.92 | 1.83 | 5% ▲ |
| 25 Russia | 1,807 | 2,542 | -29% ▼ | 7,343 | 9,121 | -19% ▼ | 4.06 | 3.59 | 13% ▲ |

Hotel Establishment Statistics

Abu Dhabi Emirate

Monthly Events

February 2016

| | Event Name | Location | Date | |
|---|--|-----------|-----------|-----------|
| | | | From | To |
| 1 | QASR AL HOSN FESTIVAL 2016 | Abu Dhabi | 3-Feb-16 | 13-Feb-16 |
| 2 | VEGAS CIRCUS | Abu Dhabi | 9-Feb-16 | 11-Mar-16 |
| 3 | ABU DHABI SUSTAINABLE BUSINESS LEADERSHIP FORUM 2016 | Abu Dhabi | 17-Feb-16 | 18-Feb-16 |
| 4 | FINA/HOSA 10KM MARATHON SWIMMING WORLD CUP | Abu Dhabi | 26-Feb-16 | 26-Feb-16 |



Hotel Establishment Statistics

Abu Dhabi Emirate

Hotel Establishments Executive Summary

Year To Date (January - February) 2016

- The number of guests showed an increase of 10% in year to date (Jan- Feb) 2016 when compared to last year, with the total number of hotel guest arrivals at 709,314.
- The number of hotel guest nights increased by 7% to 1,994,285 guest nights .
- The average length of stay for year to date decreased by 2% in comparison to same period of 2015.
- Hotel occupancy recorded 2% decrease in comparison to last year.
- Total revenue for hotel establishments recorded 9% decrease (AED 1,092 Billion), room revenue decreased by 14%, while 4% decreased in food & beverage revenue.

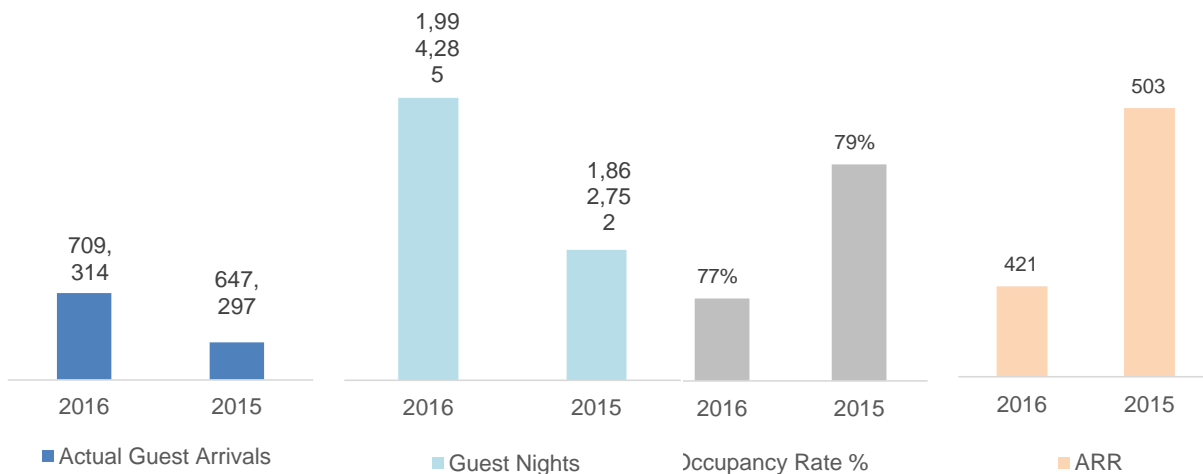
Hotel Establishment Statistics

Abu Dhabi Emirate

Hotel Establishments Main Indicators Summary

Year To Date (January - February) 2016

| Indicator | Year To Date (January - February) | | |
|------------------------|-----------------------------------|---------------|---------------|
| | 2016 | 2015 | Growth Rate % |
| Actual Guest Arrivals | 709,314 | 647,297 | 10% ▲ |
| Guest Nights | 1,994,285 | 1,862,752 | 7% ▲ |
| Room Nights | 1,347,575 | 1,300,065 | 4% ▲ |
| Average Length of Stay | 2.81 | 2.88 | -2% ▼ |
| Occupancy Rate % | 77% | 79% | -2% ▼ |
| Room Revenue | 576,991,173 | 670,824,718 | -14% ▼ |
| Food & Beverages | 382,296,347 | 398,042,962 | -4% ▼ |
| Other Revenue | 133,394,798 | 131,800,118 | 1% ▲ |
| Total Revenue | 1,092,682,318 | 1,200,667,799 | -9% ▼ |
| ARR | 421 | 503 | -16% ▼ |
| REV PAR | 325 | 397 | -18% ▼ |



Hotel Establishment Statistics

Abu Dhabi Emirate

Top 10 Nationalities

Year To Date (January - February) 2016

| | | Share % | Growth% | Guests | Average Length of Stay |
|----|-------------|---------|---------|---------|------------------------|
| 1 | UAE | 32% | 11% ▲ | 226,883 | 2.24 |
| 2 | India | 7% | 27% ▲ | 47,064 | 3.47 |
| 3 | China | 6% | -2% ▼ | 45,555 | 1.40 |
| 4 | UK | 5% | 2% ▲ | 36,613 | 4.19 |
| 5 | US | 4% | -5% ▼ | 25,638 | 4.38 |
| 6 | Germany | 3% | -7% ▼ | 24,529 | 4.15 |
| 7 | KSA | 3% | 10% ▲ | 23,808 | 2.44 |
| 8 | Egypt | 3% | 29% ▲ | 23,601 | 2.74 |
| 9 | Philippines | 3% | 21% ▲ | 20,660 | 2.20 |
| 10 | Jordan | 2% | 33% ▲ | 16,698 | 2.81 |

Total Hotel Establishment Guests

709,314



Hotel Establishment Statistics

Abu Dhabi Emirate

Top 25 Nationalities

Year To Date (January - February) 2016

| Nationality | Guest Arrivals | | | Guestnights | | | Average Length of Stay | | |
|-----------------|----------------|---------|---------------|-------------|---------|---------------|------------------------|------|---------------|
| | 2016 | 2015 | Growth Rate % | 2016 | 2015 | Growth Rate % | 2016 | 2015 | Growth Rate % |
| 1 UAE | 226,883 | 205,036 | 11% ▲ | 509,098 | 488,780 | 4% ▲ | 2.24 | 2.38 | -6% ▼ |
| 2 India | 47,064 | 37,116 | 27% ▲ | 163,082 | 140,698 | 16% ▲ | 3.47 | 3.79 | -9% ▼ |
| 3 China | 45,555 | 46,464 | -2% ▼ | 63,684 | 64,285 | -1% ▼ | 1.40 | 1.38 | 1% ▲ |
| 4 UK | 36,613 | 36,008 | 2% ▲ | 153,431 | 149,899 | 2% ▲ | 4.19 | 4.16 | 1% ▲ |
| 5 US | 25,638 | 27,081 | -5% ▼ | 112,415 | 114,035 | -1% ▼ | 4.38 | 4.21 | 4% ▲ |
| 6 Germany | 24,529 | 26,333 | -7% ▼ | 101,708 | 107,046 | -5% ▼ | 4.15 | 4.07 | 2% ▲ |
| 7 KSA | 23,808 | 21,687 | 10% ▲ | 58,093 | 47,475 | 22% ▲ | 2.44 | 2.19 | 11% ▲ |
| 8 Egypt | 23,601 | 18,320 | 29% ▲ | 64,613 | 51,334 | 26% ▲ | 2.74 | 2.80 | -2% ▼ |
| 9 Philippines | 20,660 | 17,057 | 21% ▲ | 45,490 | 37,182 | 22% ▲ | 2.20 | 2.18 | 1% ▲ |
| 10 Jordan | 16,698 | 12,537 | 33% ▲ | 46,842 | 37,742 | 24% ▲ | 2.81 | 3.01 | -7% ▼ |
| 11 France | 14,440 | 11,033 | 31% ▲ | 43,964 | 37,808 | 16% ▲ | 3.04 | 3.43 | -11% ▼ |
| 12 Pakistan | 13,670 | 11,129 | 23% ▲ | 33,345 | 29,700 | 12% ▲ | 2.44 | 2.67 | -9% ▼ |
| 13 Italy | 12,474 | 10,111 | 23% ▲ | 48,344 | 42,705 | 13% ▲ | 3.88 | 4.22 | -8% ▼ |
| 14 Oman | 12,207 | 11,964 | 2% ▲ | 19,910 | 19,627 | 1% ▲ | 1.63 | 1.64 | -1% ▼ |
| 15 Syria | 9,838 | 8,074 | 22% ▲ | 24,528 | 16,284 | 51% ▲ | 2.49 | 2.02 | 24% ▲ |
| 16 Australia | 8,375 | 7,364 | 14% ▲ | 26,320 | 24,752 | 6% ▲ | 3.14 | 3.36 | -7% ▼ |
| 17 Lebanon | 6,599 | 5,323 | 24% ▲ | 21,394 | 17,112 | 25% ▲ | 3.24 | 3.21 | 1% ▲ |
| 18 Canada | 5,788 | 6,390 | -9% ▼ | 25,330 | 23,606 | 7% ▲ | 4.38 | 3.69 | 18% ▲ |
| 19 Ireland | 5,756 | 3,447 | 67% ▲ | 14,723 | 13,470 | 9% ▲ | 2.56 | 3.91 | -35% ▼ |
| 20 Qatar | 5,516 | 5,096 | 8% ▲ | 11,333 | 10,601 | 7% ▲ | 2.05 | 2.08 | -1% ▼ |
| 21 Morocco | 4,449 | 3,141 | 42% ▲ | 12,743 | 10,912 | 17% ▲ | 2.86 | 3.47 | -18% ▼ |
| 22 Kuwait | 4,375 | 5,774 | -24% ▼ | 11,871 | 13,904 | -15% ▼ | 2.71 | 2.41 | 13% ▲ |
| 23 Russia | 4,308 | 5,296 | -19% ▼ | 22,641 | 24,649 | -8% ▼ | 5.26 | 4.65 | 13% ▲ |
| 24 Switzerland | 4,266 | 4,373 | -2% ▼ | 14,844 | 15,565 | -5% ▼ | 3.48 | 3.56 | -2% ▼ |
| 25 South Africa | 4,243 | 3,235 | 31% ▲ | 14,607 | 13,536 | 8% ▲ | 3.44 | 4.18 | -18% ▼ |



Hotel Establishment Statistics

Regional Summary

| Abu Dhabi City | Feb 2016 | | | Year To Date (January - February) | | |
|------------------------|-------------|-------------|---------------|-----------------------------------|---------------|---------------|
| | 2016 | 2015 | Growth Rate % | 2016 | 2015 | Growth Rate % |
| Actual Guest Arrivals | 299,609 | 266,524 | 12% ▲ | 617,086 | 562,334 | 10% ▲ |
| Guest Nights | 853,898 | 792,176 | 8% ▲ | 1,792,142 | 1,672,464 | 7% ▲ |
| Average Length of Stay | 2.85 | 2.97 | -4% ▼ | 2.9 | 2.97 | -2% ▼ |
| Occupancy Rate % | 78% | 83% | -6% ▼ | 78% | 80% | -2% ▼ |
| Total Revenue | 474,194,923 | 570,708,596 | -17% ▼ | 977,053,039 | 1,080,769,754 | -10% ▼ |
| ARR | 403 | 547 | -26% ▼ | 412.72 | 497.93 | -17% ▼ |
| REV PAR | 315 | 453 | -30% ▼ | 322 | 398 | -19% ▼ |

Rooms Summary

| February 2016 | Hotels & Apartments | Rooms (Total Inventory) | Share % |
|-----------------------------|---------------------|-------------------------|-------------|
| Hotel Establishments | 139 | 26,598 | 100% |
| Hotels | 86 | 20,418 | 62% |
| 5 Star | 31 | 9,866 | |
| 4 Star | 26 | 6,261 | |
| 3 Star | 17 | 3,262 | |
| 2 Star | 8 | 731 | |
| 1 Star | 4 | 298 | |
| Hotel Apartments | 53 | 6,180 | 38% |
| Deluxe | 20 | 3,301 | |
| Superior | 20 | 2,201 | |
| Standard | 13 | 678 | |

Hotel Establishment Statistics

Regional Summary

| Al Ain City | Feb 2016 | | | Year To Date (January - February) | | | | |
|------------------------|------------|------------|------|-----------------------------------|------------|------------|---------------|---|
| | Indicator | 2016 | 2015 | Growth Rate % | 2016 | 2015 | Growth Rate % | |
| Actual Guest Arrivals | 29,356 | 31,628 | -7% | ▼ | 62,356 | 66,200 | -6% | ▼ |
| Guest Nights | 63,966 | 62,548 | 2% | ▲ | 133,359 | 130,237 | 2% | ▲ |
| Average Length of Stay | 2.18 | 1.98 | 10% | ▲ | 2.14 | 1.97 | 9% | ▲ |
| Occupancy Rate % | 72% | 73% | -1% | ▼ | 71% | 72% | -1% | ▼ |
| Total Revenue | 28,037,342 | 29,151,018 | -4% | ▼ | 58,412,489 | 61,327,364 | -5% | ▼ |
| ARR | 372 | 392 | -5% | ▼ | 383.34 | 404.01 | -5% | ▼ |
| REV PAR | 269 | 286 | -6% | ▼ | 273 | 291 | -6% | ▼ |

Rooms Summary

| February 2016 | Hotels & Apartments | Rooms (Total Inventory) | Share % |
|-----------------------------|---------------------|-------------------------|-------------|
| Hotel Establishments | 17 | 1,910 | 100% |
| Hotels | 12 | 1,465 | 71% |
| 5 Star | 3 | 481 | |
| 4 Star | 7 | 798 | |
| 3 Star | - | - | |
| 2 Star | 1 | 124 | |
| 1 Star | 1 | 62 | |
| Hotel Apartments | 5 | 445 | 29% |
| Deluxe | - | - | |
| Superior | 3 | 337 | |
| Standard | 2 | 108 | |

Hotel Establishment Statistics

Regional Summary

| Western Region | Feb 2016 | | | Year To Date (January - February) | | |
|------------------------|------------|------------|---------------|-----------------------------------|------------|---------------|
| | 2016 | 2015 | Growth Rate % | 2016 | 2015 | Growth Rate % |
| Actual Guest Arrivals | 11,078 | 9,622 | 15% ▲ | 29,872 | 18,763 | 59% ▲ |
| Guest Nights | 33,486 | 29,618 | 13% ▲ | 68,784 | 60,051 | 15% ▲ |
| Average Length of Stay | 3.02 | 3.08 | -2% ▼ | 2.3 | 3.2 | -28% ▼ |
| Occupancy Rate % | 67% | 68% | -2% ▼ | 67% | 69% | -2% ▼ |
| Total Revenue | 27,381,022 | 29,182,080 | -6% ▼ | 57,216,790 | 58,570,681 | -2% ▼ |
| ARR | 706 | 822 | -14% ▼ | 714.19 | 843.91 | -15% ▼ |
| REV PAR | 471 | 558 | -16% ▼ | 480 | 578 | -17% ▼ |

Rooms Summary

| February 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 | - | - | |

Hotel Establishment Statistics

Terms and Definitions

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

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

RevPAR:

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