



مركز الإحصاء - أبوظبي  
STATISTICS CENTRE - ABU DHABI



# Hotel Establishments

(Abu Dhabi Emirate) 2010-2011

May 2012

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## Introduction

This publication provides transparent and reliable statistics on Hotel Establishments in the Emirate of Abu Dhabi. The statistics show the numbers of guests and guest nights in addition to the average length of stay. Hotel establishment statistics also presents occupancy rate as well as revenues generated from hotel facilities. The main source for these statistics is the Abu Dhabi Tourism Authority.

Information provided by hotel establishment statistics enables the government to set plans and policies responding to both current and future demands, in addition to providing reliable data for academic researchers.

The Technical Notes section at the end of this report provides an explanation of the key terms and technical concepts used. Readers are encouraged to refer to that section while reading the statistics and information outlined in the publication.

## Key Points

- The number of hotel establishments totaled 129 units in 2011, of which 79 are hotels.
- The number of guests grew to 2.1 million, an increase of 16.5 per cent between 2010 and 2011.
- In 2011, UAE Nationals represented 39.0 per cent of hotel establishments' guests, followed by Europeans with 18.0 per cent.
- More than a third of the guests (34.8%) preferred to stay in five-star hotels.
- Guest nights rose by 22.2 per cent to 6.3 million nights in 2011.
- The total number of rooms in 2011 equaled about 21 thousands.
- The average length of stay in 2011 equaled 2.97 days.
- The annual occupancy rate rose from 64.7 per cent in 2010 to 68.9 per cent in 2011.
- The highest occupancy rate during 2011 was recorded in the months of February (77.3%) and October (77.1%).
- Hotel establishments' revenues in 2011 equaled about AED 4.4 billion.

## Hotel Establishments

The number of hotel establishments increased by 11.2 per cent from 116 in 2010 to 129 in 2011.

As a result, the number of rooms rose from 18.8 thousand in 2010 to 21.3 thousand in 2011.

Table (1) Key Indicators for Hotel Establishments, 2010 - 2011

Indicator	2010	2011	Change %
Number of Hotel Establishments	116	129	11.2
Number of Rooms	18,844	21,254	12.8
Number of Guests (Thousand)	1,812	2,112	16.5
Number of Guest nights (Thousand)	5,132	6,270	22.2
Average Length of Stay (Nights)	2.83	2.97	5.0
Annual Occupancy Rate (per cent)	64.7	68.9	6.5

Source: Abu Dhabi Tourism Authority

In 2011, the number of guests totaled about 2.1 million, an increase of 16.5 per cent compared with the previous year. The occupancy rate rose to 68.9 per cent in 2011, an increase of 6.5 per cent. The number of guest nights grew by 22.2 per cent compared with 2010, while the average length of stay also increased by 0.14 days.

The average length of stay in hotel apartments was about two days longer compared with hotels, and the occupancy rate in hotel apartments was also higher than hotels.

**Table (2) Key Indicators for Hotel Establishments by Type, 2011**

Indicator	Hotels	Hotel Apartments	Total
Number of Hotel Establishments	79	50	<b>129</b>
Number of Rooms	16,056	5,198	<b>21,254</b>
Number of Guests (Thousand)	1,688	424	<b>2,112</b>
Number of Guest nights (Thousand)	4,374.8	1,894.9	<b>6,269.7</b>
Average Length of Stay (Nights)	2.59	4.47	<b>2.97</b>
Annual Occupancy Rate ( per cent)	65.6	77.6	<b>68.9</b>
Average Revenue of Hotel Rooms (AED)	537.7	383.9	<b>489.9</b>
Average Revenue of Available Room (AED)	352.6	297.9	<b>337.5</b>

Source: Abu Dhabi Tourism Authority

Most guests (83.8%) preferred to stay in Abu Dhabi region, compared with 12.6 per cent in Al Ain and 3.6 per cent in Al Gharbia. The average length of stay in Al Gharbia region equaled 3.36 days, 3.09 in Abu Dhabi region and 2.03 in Al Ain region. The occupancy rate was 70.1 per cent in Abu Dhabi and 63.3 per cent in Al Gharbia, followed by 59.4 per cent in Al Ain.

**Table (3) Key Indicators for Hotel Establishments by Region, 2011**

Indicator	Abu Dhabi	Al Ain	Al Gharbia	Total
Number of Guests (Thousand)	1,769	266	76	<b>2,112</b>
Number of Nights (Thousand)	5,471	542	257	<b>6,270</b>
Average Length of Stay (Nights)	3.09	2.03	3.36	<b>2.97</b>
Annual Occupancy Rate ( per cent)	70.1	59.4	63.3	<b>68.9</b>
Average Revenue of Hotel Rooms (AED)	486.6	460.1	633.1	<b>489.9</b>
Average Revenue of Available Room (AED)	341.3	273.4	400.4	<b>337.5</b>

Source: Abu Dhabi Tourism Authority

## Number of Guests

The total number of guests increased to 2.1 million in 2011 by 16.5 per cent. UAE nationals represented the largest percentage of hotel establishments' guests with 39.0 per cent, followed by Europeans with 18.0 per cent.

The number of guests increased for all nationalities; the largest increase was from Africa (excluding Arab countries) with an increase of 32.2 per cent compared with 2010, followed by guests from Australia and Asia Pacific which increased by 31.6 per cent. The lowest increase was for North and South American guests with less than a 1 per cent increase, followed by UAE Nationals with a 9.5 per cent increase compared with 2010.

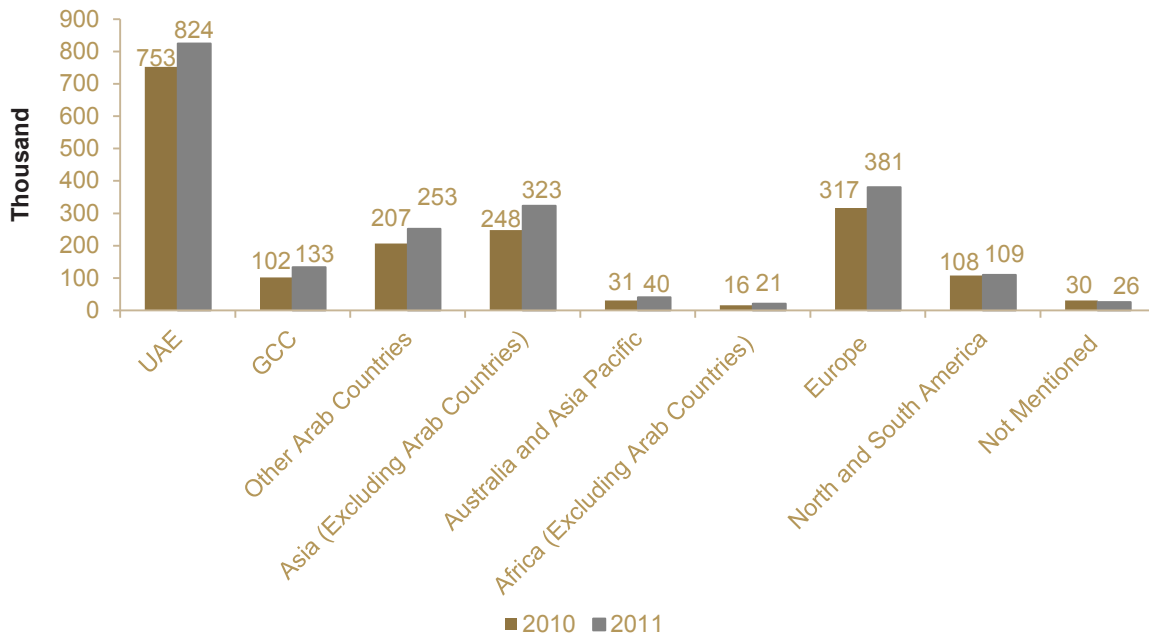
**Table (4) Guests of Hotel Establishments by Nationality, 2010 - 2011**

Nationality	2010	2011	Change %
UAE	752,777	824,442	9.5
GCC	102,067	133,277	30.6
Other Arab Countries	206,830	252,626	22.1
Asia (Excluding Arab Countries)	248,273	323,094	30.1
Australia and Asia Pacific	30,712	40,414	31.6
Africa (Excluding Arab Countries)	16,091	21,280	32.2
Europe	316,701	380,980	20.3
North and South America	108,303	109,327	0.9
Not Specified	30,257	26,171	-13.5
<b>Total</b>	<b>1,812,011</b>	<b>2,111,611</b>	<b>16.5</b>

Source: Abu Dhabi Tourism Authority

More than a third of guests (34.8 per cent) stayed in five-star hotels, followed by 24.6 per cent in four- star hotels, 20.5 per cent in three- star hotels & less and 20.1 per cent in hotel apartments.

Figure (1) Guests by Nationality, 2010 - 2011



Guests from Europe preferred to stay in high-quality hotels, as 44.9 per cent of them stayed in five-star hotels followed by 28.8 per cent in four-star hotels, 13.9 per cent in three stars hotels or less and 12.3 per cent in hotel apartments. North and South Americans preferred to stay in five star hotels (42.9%) followed by three stars and less and hotel apartments (31.8%) and four-star hotels (25.3%).

Asian guests (excluding Arab countries) preferred to stay in three- star and less hotels (30.2%) and in five- star hotels (20.7%). At the same time, 28.9 per cent of Arab guests stayed in three- star & less hotels, while 18.1 per cent stayed in five-star hotels.



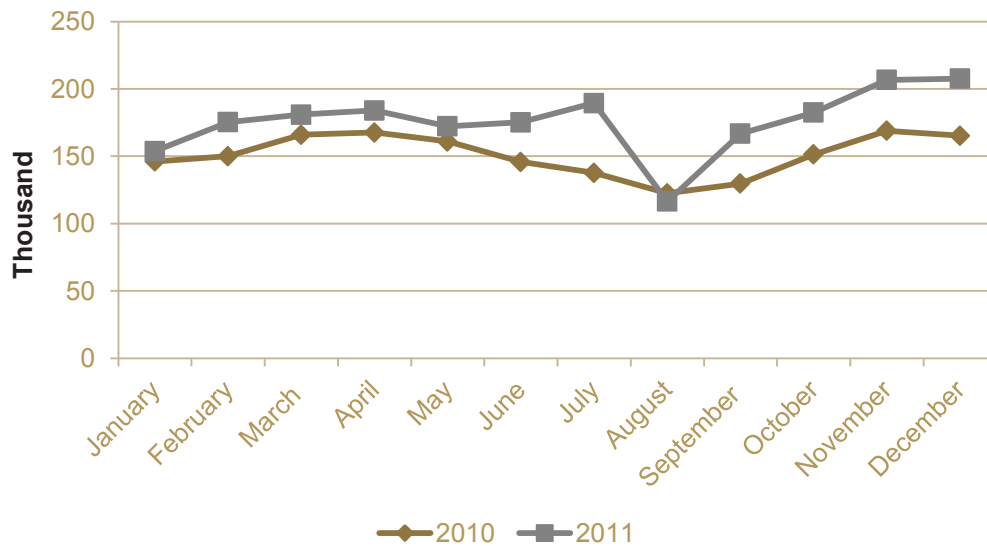
**Table (5) Guests by Nationality and Hotel Classification 2011 (Thousand)**

Nationality	Five Star	Four Star	Three Star and Less	Hotel Apartments	Total
UAE	328.7	175.7	152.6	167.5	<b>824.4</b>
GCC	46.3	27.2	29.2	30.5	<b>133.3</b>
Other Arab Countries	45.8	66.5	73.0	67.4	<b>252.6</b>
Asia (Excluding Arab Countries)	66.9	82.1	97.6	76.6	<b>323.1</b>
Australia and Asia Pacific	15.8	13.4	6.3	4.9	<b>40.4</b>
Africa (Excluding Arab Countries)	6.5	5.9	4.8	4.1	<b>21.3</b>
Europe	171.0	109.9	53.1	46.9	<b>381.0</b>
North and South America	46.9	27.6	13.9	20.9	<b>109.3</b>
Not Specified	6.4	12.2	2.0	5.6	<b>26.2</b>
<b>Total</b>	<b>734.4</b>	<b>520.5</b>	<b>432.4</b>	<b>424.3</b>	<b>2,111.6</b>

Source: Abu Dhabi Tourism Authority

Between February and July 2011, the number of hotel establishment guests remained consistently higher compared with 2010. However, in August 2011 the number of guests fell by 4.9 per cent to a similar level as in 2010. From September to December 2011, the number of guests increased again from 167 thousand to 208 thousand.

**Figure (2) Numbers of Guests by Month**



## Guest Nights

Guest nights grew by 22.2 per cent from 5.1 million nights in 2010 to 6.3 million nights in 2011. A significant percentage of the increase is attributed to guest nights for guests from Europe, which increased by 24.9 per cent. The number of guests from Europe increased by 20.3 per cent, while the average length of stay increased by 3.7 per cent.

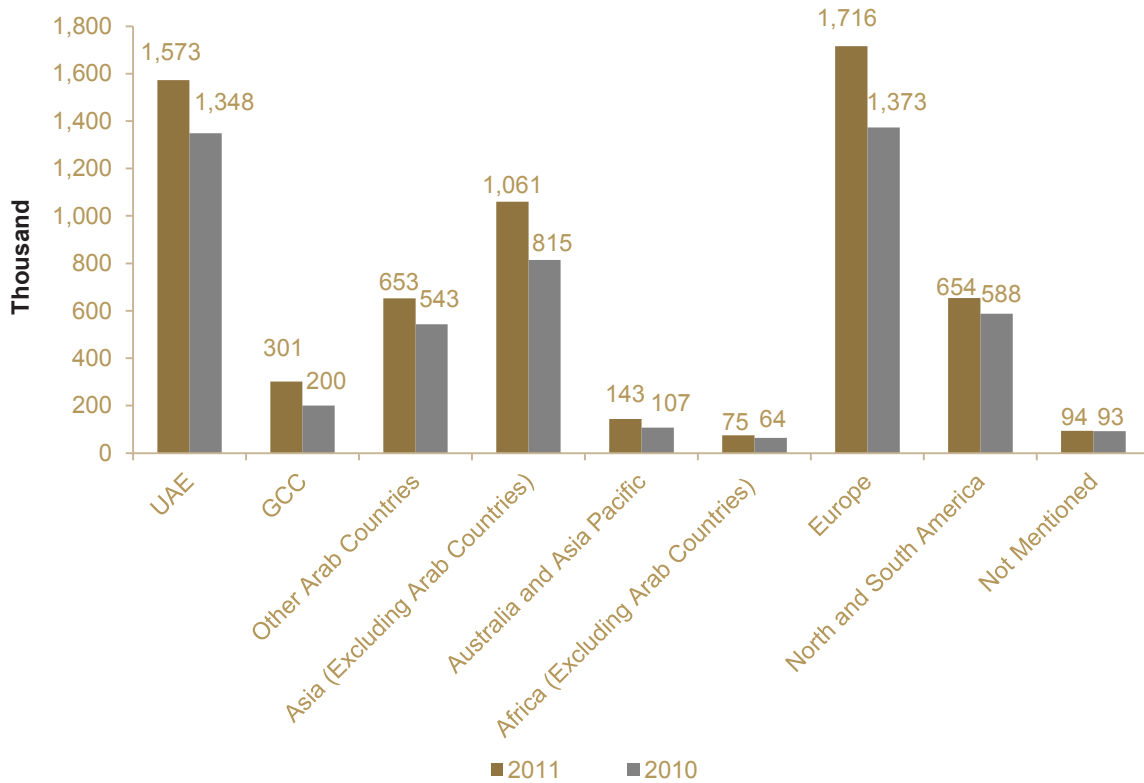
**Table (6) Guest nights by Nationality, 2010- 2011**

Nationality	2010	2011	Change %
UAE	1,348,270	1,573,266	16.7
GCC	200,223	301,105	50.4
Other Arab Countries	543,326	652,585	20.1
Asia (Excluding Arab Countries)	814,786	1,060,502	30.2
Australia and Asia Pacific	107,486	143,403	33.4
Africa (Excluding Arab Countries)	63,974	74,533	16.5
Europe	1,373,467	1,716,139	24.9
North and South America	587,711	653,879	11.3
Not Specified	93,080	94,270	1.3
<b>Total</b>	<b>5,132,323</b>	<b>6,269,682</b>	<b>22.2</b>

Source: Abu Dhabi Tourism Authority

Guests from Europe contributed 27.4 per cent of total guest nights, followed by UAE nationals with 25.1 per cent. Guest nights of Asian nationalities (excluding Arab countries) represented 16 per cent, while other Arab countries and North and South America accounted for 10.4 per cent.

Figure (3) Guest nights by Nationality 2010- 2011



### Average Length of Stay

The average length of stay rose to 2.97 nights in 2011 or by 5.0 per cent increase compared with 2010. The average length of stay decreased for other Arab countries by 1.9 percent and for African countries excluding Arab countries by 12.1 per cent. The average length of stay for North and South American guests rose by 10.1 per cent.

North and South American guests had the highest average length of stay in 2011 with 5.98 nights, followed by Europeans with 4.5 nights. UAE guests had the shortest average length of stay with 1.91, followed by the GCC guests with 2.26 nights.

Table (7) Average Length of Stay by Nationality, 2010-2011 (Night/Guest)

Nationality	2010	2011	Change %
UAE	1.79	1.91	6.70
GCC	1.96	2.26	15.31
Other Arab Countries	2.63	2.58	-1.90
Asia (Excluding Arab Countries)	3.28	3.28	0.00
Australia and Asia Pacific	3.50	3.55	1.43
Africa (Excluding Arab Countries)	3.98	3.50	-12.06
Europe	4.34	4.50	3.69
North and South America	5.43	5.98	10.13
Not Specified	3.08	3.60	16.88
<b>Total</b>	<b>2.83</b>	<b>2.97</b>	<b>4.95</b>

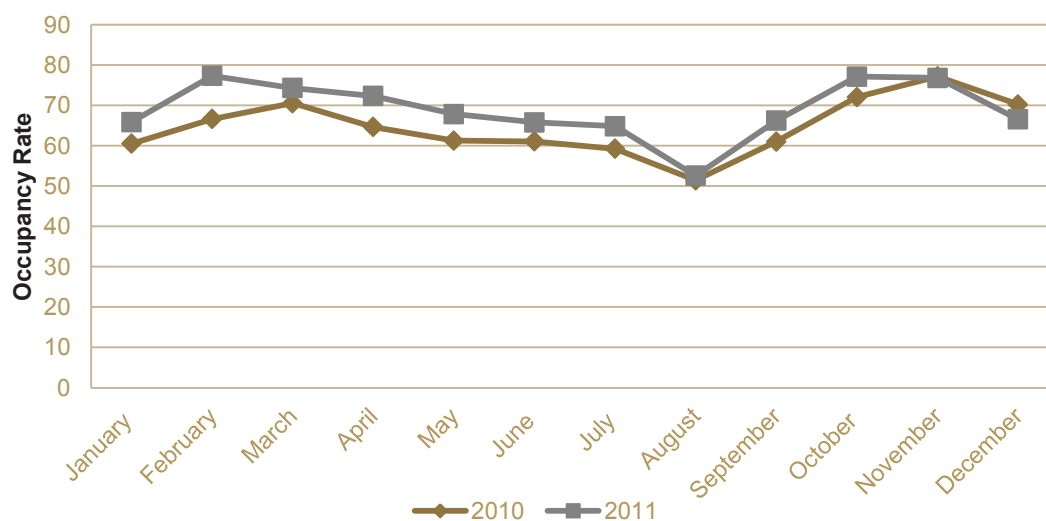
Source: Abu Dhabi Tourism Authority

## Occupancy Rate

Occupancy rate, the most important indicator of hotel establishments, rose in 2011 to 68.9 per cent, an increase of 6.5 per cent.

Figure (4) shows that the occupancy rate reached its highest level at 77.3 per cent in February followed by consistent decreases to 52.6 per cent in August 2011. Occupancy rate increased again to 66.2 per cent in September.

Figure (4) Occupancy Rate by Month 2010- 2011



## Revenues

Total revenues of hotel establishments are directly proportional to the number of guests and the average length of stay. Total revenues of hotel establishments increased by 3.5 per cent between 2010 and 2011.

**Table (8) Revenues of Hotel Establishments by Type of Revenue 2010- 2011 (Million AED)**

Revenue Type	2010	2011	Change %
Room	2,269	2,315	2.0
Food and Beverages	1,507	1,604	6.4
Other Revenues	452	457	1.0
<b>Total</b>	<b>4,228</b>	<b>4,376</b>	<b>3.5</b>

Source: Abu Dhabi Tourism Authority

Revenues generated from food and beverages in hotel establishments increased by 6.4 per cent, and represented 36.7 per cent of total revenues in 2011. Revenues from rooms increased by 2.0 per cent in 2011 and represented 52.9 per cent of total revenue.

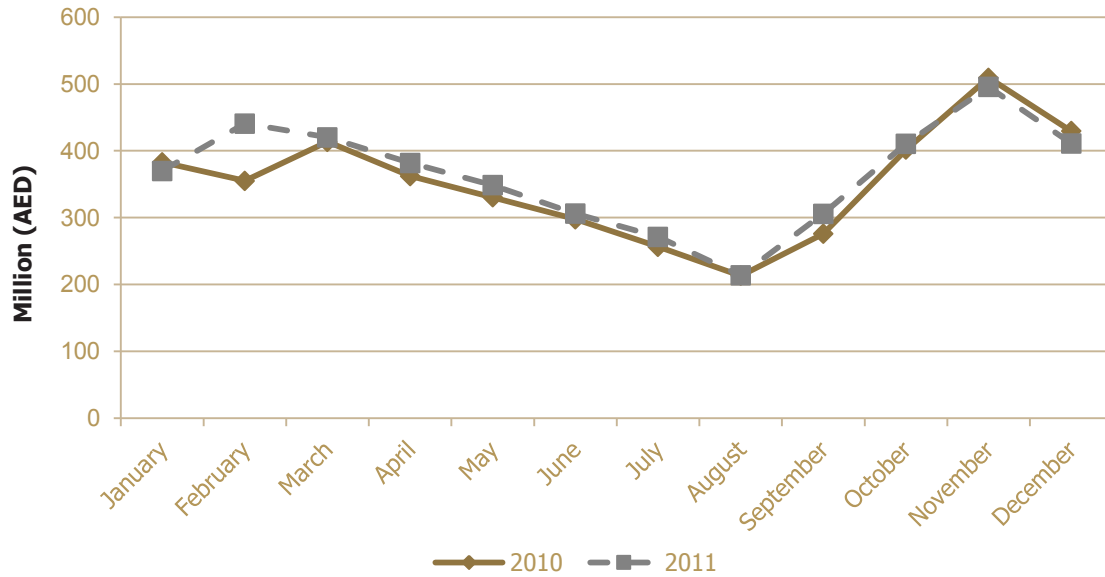
**Table (9) Percentage Distribution of Hotel Establishment Revenues by Month and Revenue Type, 2011**

Month	Rooms	Food and Beverages	Others	Total
January	8.6	8.2	8.3	<b>8.5</b>
February	11.2	8.9	8.6	<b>10.1</b>
March	9.5	9.8	9.2	<b>9.6</b>
April	8.6	8.9	8.7	<b>8.7</b>
May	7.5	8.3	9.1	<b>8.0</b>
June	6.3	7.5	8.9	<b>7.0</b>
July	6.0	6.1	7.7	<b>6.2</b>
August	4.6	5.1	5.6	<b>4.9</b>
September	6.9	6.9	7.9	<b>7.0</b>
October	9.4	9.5	8.9	<b>9.4</b>
November	12.4	10.6	8.4	<b>11.3</b>
December	9.0	10.2	8.8	<b>9.4</b>
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>

Source: Abu Dhabi Tourism Authority

During 2011 the highest revenues were generated in November, followed by February, while the lowest revenues were generated in August. From August to November 2011, revenues of hotel establishments increased again by 32.5 per cent.

**Figure (5) Revenues of Hotel Establishments by Month, 2010- 2011**



## Definitions

**Hotel Establishments:** are hotels and hotel apartments operating in the Emirate of Abu Dhabi, and licensed by the "Abu Dhabi Tourism Authority."

**Occupancy Rate:** is the number of guest nights divided by the number of available rooms in the reference period (night, month, year).

**Stay Nights:** are the total nights of all guests in a specific period.

**Average Length of Stay:** is the total number of nights divided by the number of guests during the reference period (night, month, year).

**Guest Nights:** are the numbers of guests multiplied by the duration of residence.

## Technical Notes

### Scope of the work

This report covers statistics on hotel Establishments of the Emirate of Abu Dhabi, which are supplied by the Abu Dhabi Tourism Authority (ADTA).

### Reference Period

Abu Dhabi Tourism Authority is supplied with data by the hotel establishments. Abu Dhabi Tourism Authority provides the Statistics Centre with data annually after reviewing it.

