



مركز الإحصاء  
STATISTICS CENTRE

# Hotel Establishments Statistics

## 2012 & 2013

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## **Introduction**

Tourism statistics have an economic importance as the government of Abu Dhabi identifies the tourism sector as one of the development catalysts within Abu Dhabi Vision 2030 for increasing the income and diversifying the economic base away from the oil sector. Therefore, the Statistics Centre - Abu Dhabi (SCAD) attaches a great attention to measuring development indicators in the hotel sector.

This bulletin highlights the key tourism indicators in 2012 and 2013, including the number of guests, guest nights, occupancy rate, average length of stay and revenues. Abu Dhabi Tourism and Culture Authority (TCA) is the main source of the statistics included in this report.

The “Explanatory 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 this publication. We hope that the report will meet the requirements of planners, decision makers, researchers and academics.

## Key Points

- The number of hotel establishment guests rose by 17.5% in 2013 compared with 2012.
- Emirati guests represented 34.2% in 2013.
- The number of guest nights rose by 25.6% in 2013.
- The average length of stay increased by 6.9% reaching 3.1 days in 2013.
- Occupancy rate increased by 8.6% in 2013.
- The highest occupancy rate in 2013 was recorded in November (83.1%).
- Revenues of hotel establishments rose by 18.5%, reaching AED 5.5 billion in 2013.

## Hotel Establishments

The number of hotel establishments' increased by 15.4% in 2013 reaching 150, combined with an increase of 18.2% for the total number of rooms. The number of guests totaled 2.8 million in 2013, an increase of 17.5% compared with 2012. Guest nights totaled 8.8 million in 2013; an increase of 25.6% compared with 2012. The average length of stay rose to 3.1 days. The occupancy rate was 70.8%, an increase of 8.6%. The data also shows a decline in the average room revenues and an increase in the average revenues of available rooms.

**Table (1): Key indicators of hotel establishments**

Indicator	2012	2013	Change %
Number of hotel establishments	130	150	15.4
Number of rooms	21,997	26,001	18.2
Number of guests (Thousand)	2,388.0	2,806.3	17.5
Guest night (Thousand)	6,996.7	8,789.2	25.6
Average length of stay (Nights)	2.9	3.1	6.9
Occupancy rate (%)	65.2	70.8	8.6
Average room revenues (AED)	453.2	447.6	-1.2
Average revenues of available rooms (AED)	295.5	316.9	7.2

Source: Abu Dhabi Tourism and Culture Authority

The data shows that occupancy rate increased by 8.6% in 2013 compared with 2012. By region, the occupancy rate rose to 72% in Abu Dhabi region, an increase of 9.1% compared with 2012. In Al Ain region, the occupancy rate increased to 64.8% compared with 59.3% in 2012, while in Al Gharbia the occupancy rate declined from 64.6% in 2012 to 51.8% in 2013.

**Table (2): Key indicators of hotel establishments by region**

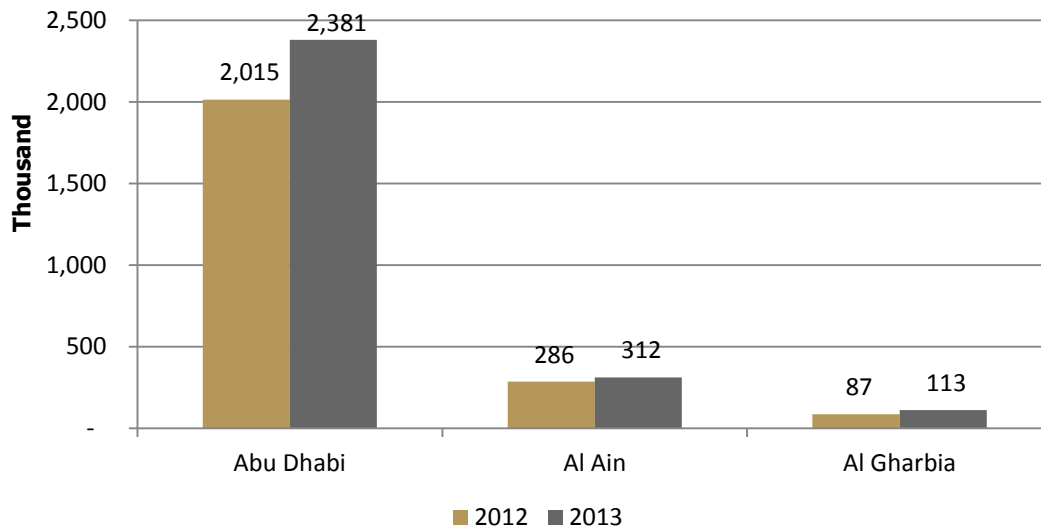
Indicator	2012				2013			
	Abu Dhabi	Al Ain	Al Gharbia	Total	Abu Dhabi	Al Ain	Al Gharbia	Total
Guests (thousand)	2,015	286	87	<b>2,388</b>	2,381	312	113	<b>2,806</b>
Guest nights (thousand)	6,153	571	272	<b>6,996</b>	7,803	641	346	<b>8,790</b>
Average length of stay (nights)	3.1	2.0	3.1	<b>2.9</b>	3.3	2.1	3.1	<b>3.1</b>
Occupancy rate (%)	66.0	59.3	64.6	<b>65.2</b>	72.0	64.8	51.8	<b>70.8</b>

Source: Abu Dhabi Tourism and Culture Authority

## Number of Guests

The total number of guests in 2013 grew to 2.8 million, an increase of 17.5% compared with 2012. The data shows that the majority of guests stayed in Abu Dhabi region by 84.9%, compared with 11.1% in Al Ain region and 4.0% in Al Gharbia. The average length of stay was 3.3 day in Abu Dhabi region, 3.1 day in Al Gharbia and 2.1 day in Al Ain region.

**Figure (1): Number of guests by region**

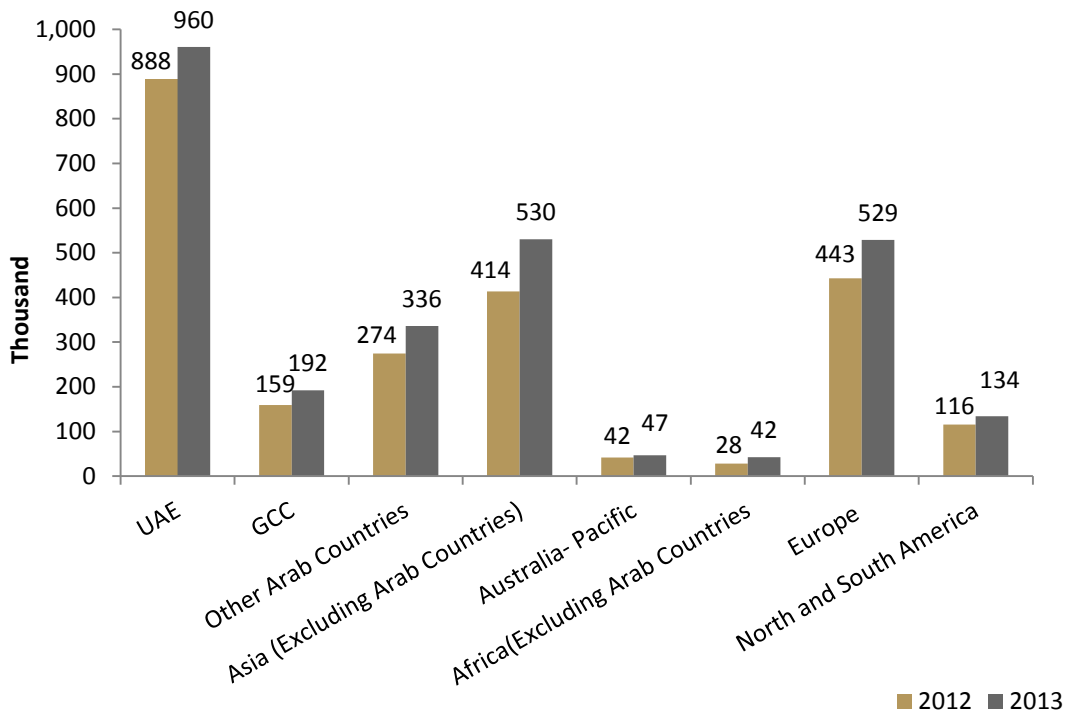


By nationality, the data indicates that UAE Citizens formed the largest segment of hotel establishment guests accounting for 34.3% of the total guests, followed by Asian nationalities (excluding Arab countries) by 20.4%. Guests from Australia and Pacific countries formed the smallest segment of guests at 1.2% in 2013.

The data reveals that the number of guests increased for all nationalities in 2013; African countries (excluding Arab countries) recorded the largest percentage increase by 49.3% compared with 2012, followed by guests from Asian countries (excluding Arab countries) by 28.1% and other Arab countries by 22.7%. The lowest percentage rise was recorded by UAE Citizens by 8.1%, followed by Australia and Pacific countries by 10.5%.

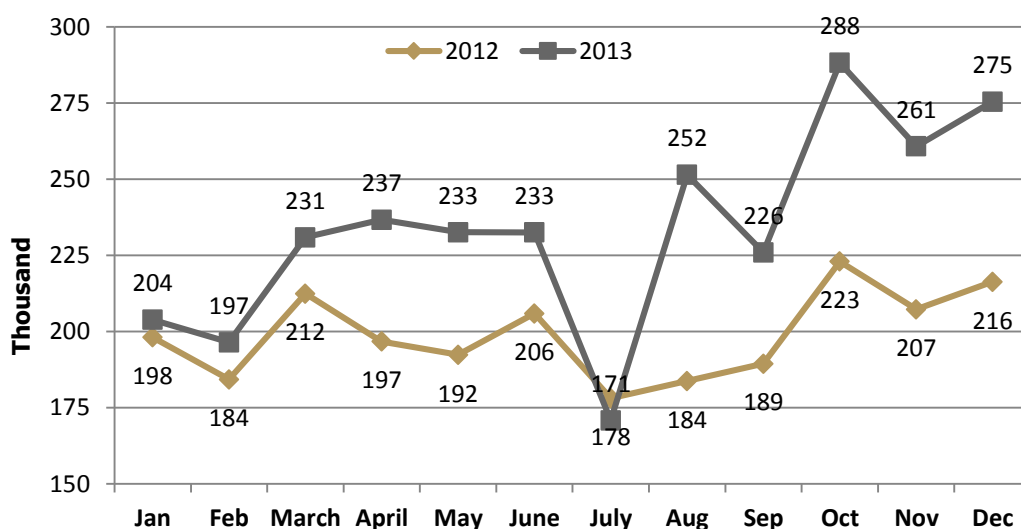
**Figure (2): Guests of hotel establishments by nationality**





The data shows that the number of guests increased in all months of 2013 except July. The number of guests decreased in July by 4.0% compared with the same month in 2012. The number of guests rose in August by 36.8% and reached the highest level in October with 288 thousand guests.

**Figure (3): Guests of hotel establishments by month**



Guests in five stars hotels accounted for 34.3% of the total, followed by guests in four stars hotels by 29.0%, guests in three stars or less by 23.0% and guests in hotel apartments by 13.4%.

**Table (3): Guests of hotel establishments by nationality and classification, 2013**

Nationality	5 stars	4 stars	3 Stars or less	Hotels apartments	Total
UAE	352,929	247,020	224,610	135,917	<b>960,476</b>
GCC	64,002	52,879	40,960	34,096	<b>191,937</b>
Other Arab countries	69,677	102,903	103,517	60,389	<b>336,486</b>
Asia (excluding Arab countries)	123,737	151,105	165,087	90,087	<b>530,016</b>
Australia and Asia Pacific	20,018	14,844	7,693	3,945	<b>46,500</b>
Africa (excluding Arab countries)	9,737	16,616	10,995	4,779	<b>42,127</b>
Europe	247,712	174,557	75,466	31,347	<b>529,082</b>
North and South America	59,301	41,363	21,312	12,208	<b>134,184</b>
Not mentioned	14,807	11,623	6,096	2,949	<b>35,475</b>
<b>Total</b>	<b>961,920</b>	<b>812,910</b>	<b>655,736</b>	<b>375,717</b>	<b>2,806,283</b>

Source: Abu Dhabi Tourism and Culture Authority

Guests from Europe preferred to stay in luxury hotels; 79.8% of them stayed in four and five stars hotels. With regard to guests from other Arab countries (i.e. excluding UAE and GCC), 20.7% of them stayed in five stars hotels and 30.8% in three stars hotels or less.

## Guest Nights

The number of guest nights increased from 7.0 million in 2012 to 8.8 million in 2013, an increase of 25.6%.

**Table (4): Guest nights by nationality**

Nationality	2012	2013	Change %
UAE	1,701,393	2,220,750	30.5
GCC	353,981	431,908	22.0
Other Arab countries	693,374	903,676	30.3
Asia (excluding Arab countries)	1,341,974	1,716,105	27.9
Australia and Asia Pacific	141,966	159,196	12.1
Africa (excluding Arab countries)	93,646	137,494	46.8
Europe	1,969,592	2,444,342	24.1
North and South America	614,692	682,174	11.0
Not mentioned	86,106	93,570	8.7
<b>Total</b>	<b>6,996,724</b>	<b>8,789,215</b>	<b>25.6</b>

Source: Abu Dhabi Tourism and Cultural Authority

Guests from European countries accounted for the largest share of guest nights in 2012 and 2013 with 28.1% and 27.8% respectively, followed by UAE Citizens with 24.3% and 25.3% and guests from Asian countries with 19.2% and 19.5%.

Guests from other Arab countries accounted for 10.3% of the total guest nights in 2013, while guests from North and South America accounted for 7.8%. Guests from GCC countries formed 4.9% of the total guests in of 2013.

**Table (5): Guest nights by nationality and classification, 2013 (Night/ Guest)**

Nationality	Five stars	four stars	Three Stars or less	Hotels apartments	Total
UAE	802,396	499,902	454,000	464,452	2,220,750
GCC	155,754	106,049	77,692	92,413	431,908
Other Arab countries	185,386	214,469	233,810	270,011	903,676
Asia (excluding Arab countries)	310,851	357,928	409,060	638,266	1,716,105
Australia and Asia Pacific	54,133	36,318	21,538	47,207	159,196
Africa (excluding Arab countries)	31,657	41,069	30,491	34,277	137,494
Europe	1,048,236	655,090	287,035	453,981	2,444,342
North and South America	224,035	165,644	66,931	225,564	682,174
Not mentioned	27,869	22,710	18,198	24,793	93,570
<b>Total</b>	<b>2,840,317</b>	<b>2,099,179</b>	<b>1,598,755</b>	<b>2,250,964</b>	<b>8,789,215</b>

Source: Abu Dhabi Tourism and Culture Authority

## Average Length of Stay

The average length of stay increased from 2.9 nights in 2012 to 3.1 nights in 2013, an increase of 6.9%.

The highest rise in the average length of stay was recorded by UAE Citizens at 4.5%, followed by guests from Other Arab countries by 3.8%. The average length of stay of guests from Asia (excluding Arab countries) declined by 5.9%.

The highest average length of stay in 2012 and 2013 was recorded by guests from North and South Americas at 5.3 and 5.1 nights respectively, followed by European guests

with 4.6 in 2012 and 2013. The lowest average length of stay was recorded by UAE guests at 2.2 and 2.3 nights respectively, followed by GCC guests at 2.3 in 2012 and 2013.

**Table (6): Average length of stay by nationality (Night/ Guest)**

Nationality	2012	2013	Change %
UAE	2.2	2.3	4.5
GCC	2.3	2.3	0.0
Other Arab countries	2.6	2.7	3.8
Asia (excluding Arab countries)	3.4	3.2	-5.9
Australia and Asia Pacific	3.6	3.4	-5.6
Africa (excluding Arab countries)	3.4	3.3	-2.9
Europe	4.6	4.6	0.0
North and South America	5.3	5.1	-3.8
Not specified	3.0	2.0	-33.3
<b>Total</b>	<b>2.9</b>	<b>3.1</b>	<b>6.9</b>

Source: Abu Dhabi Tourism and Culture Authority

The data shows that the average length of stay in hotel apartments was twice as long as it was in hotels; the average length of stay in five star hotels was 3.0 days.

The longest average length of stay in hotel apartments was recorded by guests from North and South America (18.5 days), followed by guests from Europe (14.5 days) and guests from Australia and Pacific (12.0 days). The shortest average length of stay in hotel apartments was recorded by GCC guests.

The longest average length of stay in five stars hotels was recorded by guests from Europe (4.2 days), followed by guests from North and South America (4.0 days). The shortest average length of stay was recorded in three stars (or less) hotels by GCC guests (1.9 days).

**Table (7): Average length of stay by nationality and classification, 2013 (Night/ Guest)**

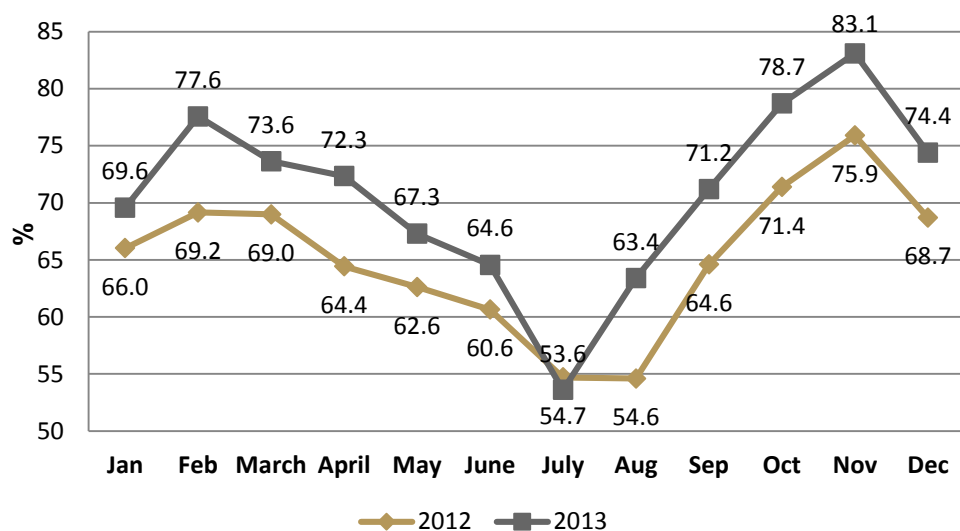
Nationality	Five stars	four stars	Three Stars or less	Hotels apartments	Total
UAE	2.3	2.0	2.0	3.4	2.3
GCC	2.4	2.0	1.9	2.7	2.3
Other Arab countries	2.7	2.1	2.3	4.5	2.7
Asia (excluding Arab countries)	2.5	2.4	2.5	7.1	3.2
Australia and Asia Pacific	2.7	2.4	2.8	12.0	3.4
Africa (excluding Arab countries)	3.3	2.5	2.8	7.2	3.3
Europe	4.2	3.8	3.8	14.5	4.6
North and South America	3.8	4.0	3.1	18.5	5.1
Not mentioned	1.9	2.0	3.0	8.4	2.6
<b>Total</b>	<b>3.0</b>	<b>2.6</b>	<b>2.4</b>	<b>6.0</b>	<b>3.1</b>

Source: Abu Dhabi Tourism and Culture Authority, Statistics Centre – Abu Dhabi

## Occupancy Rate

Occupancy rate rose to 70.8% in 2013, an increase of 8.6% compared with 2012.

**Figure (4): Occupancy rate by month**



The data shows that the highest occupancy rate in early 2013 was recorded in February at 77.6%, and then the occupancy rate dropped to 53.6% in July. It increased in November reaching the highest level at 83.1%. Finally it dropped in December to 74.4%.

## Revenues

The total revenues of hotel establishments amounted to AED 5.5 billion in 2013, an increase of 18.5% compared with 2012. Food and beverage revenues rose by 16.9%, while room revenues increased by 21.1% during the same period.

Room revenues formed 51.7% of the total revenues, followed by food and beverage revenues at 38.4% in 2013.

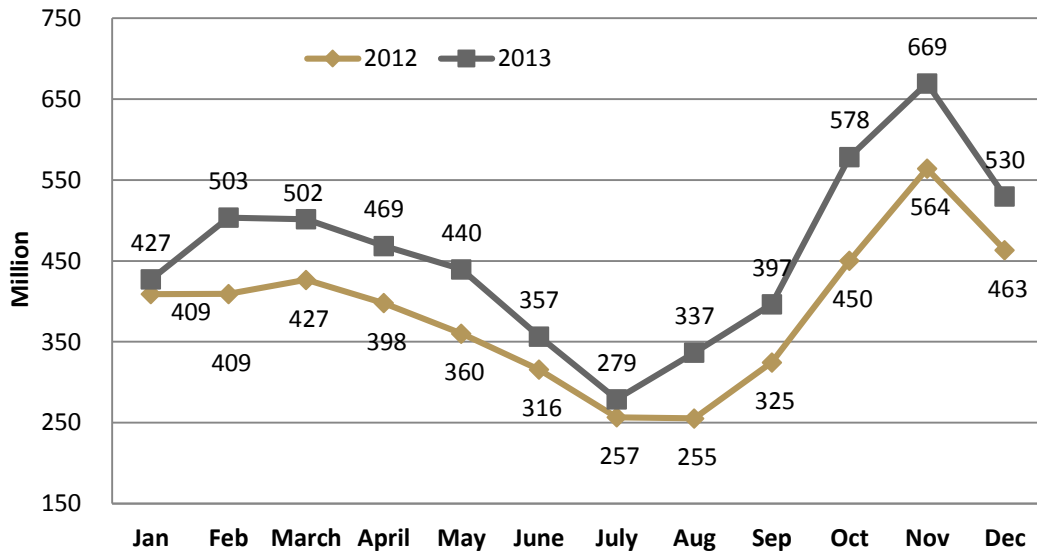
**Table (8): Revenues of hotel establishments by type (AED million)**

Revenue Type	2012	2013	Change %
Room	2,344	2,838	21.1
Food and Beverages	1,803	2,108	16.9
Other Revenues	487	543	11.5
<b>Total Revenues</b>	<b>4,634</b>	<b>5,489</b>	<b>18.5</b>

Source: Abu Dhabi Tourism and Culture Authority

The highest revenues were recorded in November 2013 with 12.2% of the annual total, followed by October. The lowest revenues were recorded in July. The pattern of revenues in 2013 is similar to 2012.

**Figure (5): Revenues of hotel establishments by month**





## Terms and Definitions

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

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

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

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

## Technical Notes

### Scope of the work

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

### Reference Period

Abu Dhabi Tourism and Cultural Authority receives the data from hotel establishments. Abu Dhabi Tourism and Cultural Authority provides Statistics – Centre Abu Dhabi annually with the data after reviewing it.

