



مركز الإحصاء  
STATISTICS CENTRE



# Hotel Establishments Statistics

First Quarter, 2014

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## **Introduction**

Tourism and Hotel Establishments' 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. The tourism sector has been included in the ten leading sectors of the five-year plan for the development of the emirate. 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 the first quarter of 2014 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 bulletin.

The "Explanatory Notes" section at the end of this bulletin 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 bulletin. We hope that the bulletin will meet the requirements of planners, decision makers, researchers, academics and data users.

## Key Points

- The number of hotel establishment guests in the first quarter of 2014 rose by 32.2% compared with the first quarter of 2013 reaching 834.8 thousand guests.
- UAE Nationals accounted for 31.2% of the guests in the first quarter of 2014, an increase of 28.8% compared with the first quarter of 2013.
- More than a third (37.1%) of guests stayed in five star hotels in the first quarter of 2014.
- Guest nights rose by 21.8% reaching 2.6 million nights in the first quarter of 2014.
- The average length of stay in the first quarter of 2014 was 3.1 days.
- The highest occupancy rate of 86.4% was recorded by hotel apartments compared with 77.2% for hotels in the first quarter of 2014.
- Hotel establishments' revenues rose by 10.7% from the first quarter of 2013 to the first quarter of 2014 reaching AED 1.6 billion.

## Hotel Establishments

The number of hotel establishments' increased by 7.8% in first quarter of 2014 reaching 152, while the total number of rooms increased by 9.8%. The number of guests totaled 835 thousand in first quarter of 2014, an increase of 32.2% compared with the first quarter of 2013. Guest nights totaled 2.6 million nights in the first quarter of 2014; an increase of 21.8% compared with the first quarter of 2013. The average length of stay declined by 8.0% to 3.1 days. The occupancy rate was 79.2% in the first quarter of 2014, an increase of 7.8% compared with the same quarter of 2013. The data also shows a decrease in the average room revenues and an increase in the average revenues of available rooms.

**Table 1: Key indicators of hotel establishments, first quarter of 2013- 2014**

Indicator	2013	2014	Change %
Number of hotel establishments	141	152	<b>7.8</b>
Number of rooms	24,416	26,811	<b>9.8</b>
Number of guests (thousand)	631.4	834.8	<b>32.2</b>
Number of guest nights (thousand)	2,119.0	2,580.8	<b>21.8</b>
Average length of stay (nights)	3.4	3.1	<b>-8.0</b>
Occupancy rate (%)	73.5	79.2	<b>7.8</b>
Average room revenues (AED)	488.7	454.5	<b>-7.0</b>
Average revenues of available rooms (AED/per night)	359.2	360.1	<b>0.3</b>

**Source:** Abu Dhabi Tourism and Cultural Authority

The number of guests in the first quarter of 2014 totaled 835 thousand, an increase of 32.2% compared with the first quarter of 2013. The occupancy rate was 79.2%, an increase of 7.8%, and guest nights reached 2.6 million, an increase of 21.8% compared with the first quarter of 2013.

The average length of stay in hotel apartments was three days longer than hotels, and the occupancy rate in hotel apartments (86.4%) was higher than hotels (77.2%) in the first quarter of 2014.

**Table 2: Key indicators of hotel establishments by type, first quarter of 2014**

Indicator	Hotels	Hotel apartments	Total
Number of guests (thousand)	735.4	99.4	<b>834.8</b>
Number of guest nights (thousand)	1,954.9	625.8	<b>2,580.8</b>
Average length of stay (nights)	2.7	6.3	<b>3.1</b>
Occupancy rate (%)	77.2	86.4	<b>79.2</b>
Average room revenues (AED)	487.5	348.2	<b>454.5</b>
Average revenues of available rooms (AED /per night)	376.5	301.1	<b>360.1</b>

Source: Abu Dhabi Tourism and Cultural Authority

The majority of guests stayed in the Abu Dhabi region with 83.0% of the total guests in the first quarter of 2014 compared with 10.6% in the Al Ain region and 6.5% in the Al Gharbia region. The average length of stay was 3.3 days in the Abu Dhabi region, 2.1 days in Al Ain region and 2.6 days in Al Gharbia.

**Table 3: Key indicators of hotel establishments by region, first quarter of 2014**

Indicator	Abu Dhabi	Al Ain	Al Gharbia	Total
Number of guests (thousand)	692.5	88.4	53.9	834.8
Number of guest nights (thousand)	2,253.8	184.7	142.2	2,580.8
Average length of stay (nights)	3.3	2.1	2.6	3.1
Occupancy rate (%)	81.2	68.2	64.5	79.2
Average room revenues (AED)	440.7	425.1	732.4	454.5
Average revenues of available rooms (AED/ per night)	357.7	289.7	472.5	360.1

Source: Abu Dhabi Tourism and Cultural Authority

## Number of Guests

The total number of guests grew to 835 thousand in the first quarter of 2014, an increase of 32.2% compared with the first quarter of 2013. UAE Nationals formed the largest segment of guests in hotel

establishments, accounting for about 31.2% of the total number of guests, followed by European guests with 20.7%. The numbers of Asia (excluding Arab countries) guests increased in the same period by 20.4%.

The number of guests increased for all nationalities, the largest percentage increase in the first quarter of 2014 was from Africa (Excluding Arab Countries) with 48.7% compared with the first quarter of 2013, followed by guests from Asia (Excluding Arab Countries) with 46.4%. At the same time, the numbers of the North and South America guests increased by 45.9%.

**Table 4: Guests of hotel establishments by nationality, first quarter of 2013-2014**

Nationality	2013	2014	2014 Share (%)	Change (%)
UAE	202,506	260,755	31.2	<b>28.8</b>
GCC	45,295	58,698	7.0	<b>29.6</b>
Other Arab countries	72,107	91,912	11.0	<b>27.5</b>
Asia (excluding Arab countries)	116,586	170,675	20.4	<b>46.4</b>
Australia and Asia Pacific	9,416	10,926	1.3	<b>16.0</b>
Africa (excluding Arab countries)	8,328	12,387	1.5	<b>48.7</b>
Europe	136,079	172,852	20.7	<b>27.0</b>
North and South America	32,242	47,045	5.6	<b>45.9</b>
Not mentioned	8,858	9,521	1.1	<b>7.5</b>
<b>Total</b>	<b>631,417</b>	<b>834,771</b>	<b>100.0</b>	<b>32.2</b>

Source: Abu Dhabi Tourism and Cultural Authority

More than a third of guests (37.1%) stayed in five stars hotels in the first quarter for 2014, followed by guests in four stars hotels with 27.1%, guests in three stars or less with 23.9% and guests in hotel apartments with 11.9%



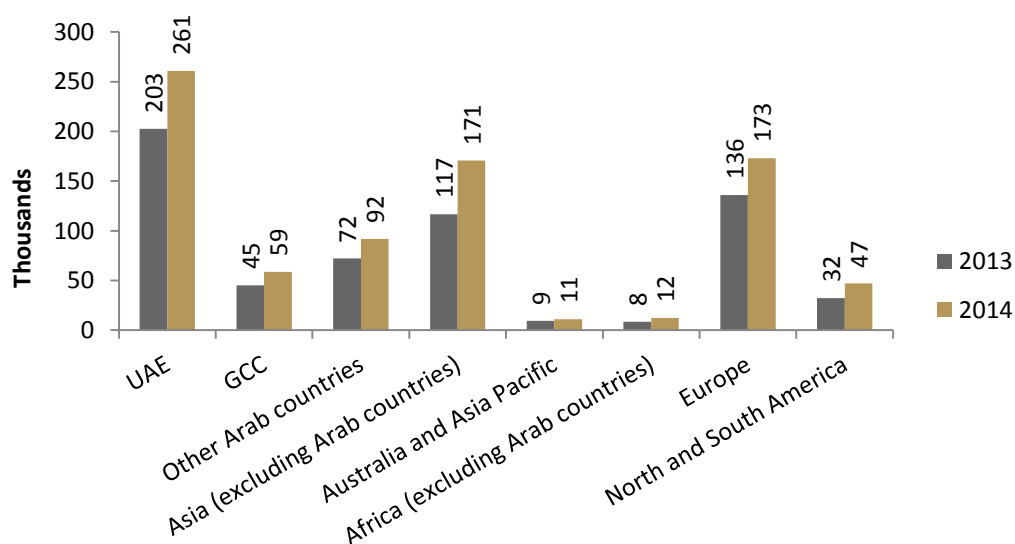
**Table 5: Hotel guests by nationality and classification, first quarter of 2014**

Nationality	Five stars	Four stars	Three stars or less	Hotels apartments	Total
UAE	108,900	61,370	56,916	33,569	<b>260,755</b>
GCC	19,600	15,921	13,869	9,308	<b>58,698</b>
Other Arab countries	18,460	26,306	31,168	15,978	<b>91,912</b>
Asia (excluding Arab countries)	49,683	46,414	50,605	23,973	<b>170,675</b>
Australia and Asia Pacific	4,155	3,056	2,597	1,118	<b>10,926</b>
Africa (excluding Arab countries)	2,839	4,775	3,574	1,199	<b>12,387</b>
Europe	79,474	53,157	30,799	9,422	<b>172,852</b>
North and South America	21,201	12,882	8,760	4,202	<b>47,045</b>
Not mentioned	5,129	2,270	1,510	612	<b>9,521</b>
<b>Total</b>	<b>309,441</b>	<b>226,151</b>	<b>199,798</b>	<b>99,381</b>	<b>834,771</b>

Source: Abu Dhabi Tourism and Cultural Authority

Guests from Europe preferred to stay in luxury hotels; around half of them (46.0%) stayed in five stars hotels. With regard to guests from other Arab countries, 33.9% of them stayed in three star hotels or less and 20.1% in five star hotels.

**Figure 1: Number of guests by nationality, first quarter of 2013-2014**



## Guest Nights

The number of guest nights totaled 2.6 million nights in the first quarter of 2014, an increase of 21.8% compared with the first quarter of 2013. Guest nights from the UAE contributed the largest share of the rise with 30.0%, followed by guests from GCC with 28.9%.

**Table 6: Guest nights by nationality, first quarter of 2013- 2014**

Nationality	2013	2014	2014 % share	Change %
UAE	464,048	603,120	23.4	<b>30.0</b>
GCC	101,916	131,416	5.1	<b>28.9</b>
Other Arab countries	206,317	244,361	9.5	<b>18.4</b>
Asia (excluding Arab countries)	445,306	539,980	20.9	<b>21.3</b>
Australia and Asia Pacific	37,359	40,179	1.6	<b>7.5</b>
Africa (excluding Arab countries)	32,419	40,293	1.6	<b>24.3</b>
Europe	631,234	748,526	29.0	<b>18.6</b>
North and South America	175,268	208,266	8.1	<b>18.8</b>
Not mentioned	25,149	24,622	1.0	<b>-2.1</b>
<b>Total</b>	<b>2,119,016</b>	<b>2,580,763</b>	<b>100.0</b>	<b>21.8</b>

Source: Abu Dhabi Tourism and Cultural Authority

Guests from Europe and the UAE represented more than half of the entire guest nights in the first quarter of 2014 with 29.0% and 23.4% respectively.

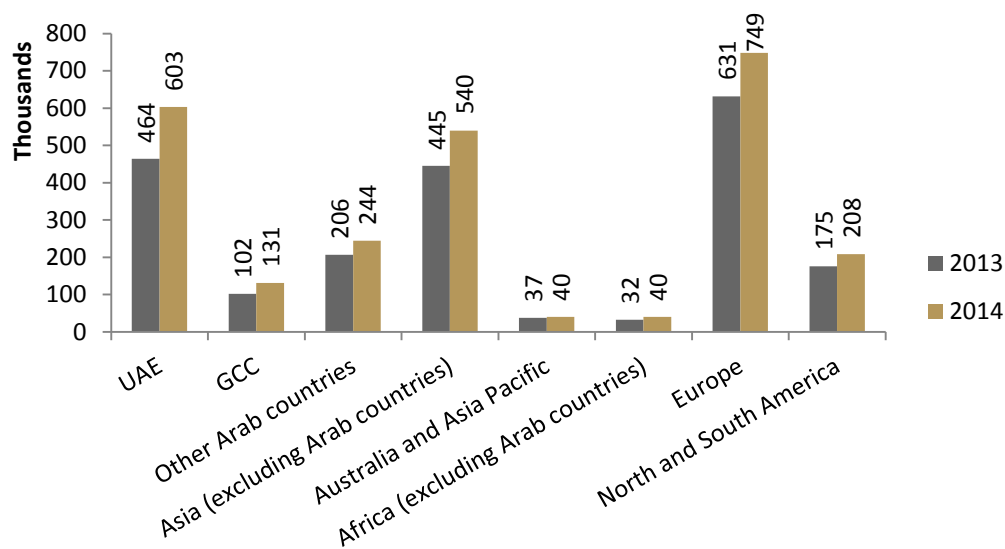
Guests from Africa (excluding Arab countries) and guests from Australia and Asia Pacific contributed the lowest share of guest nights with 1.6% each.

**Table 7: Guest nights by nationality and classification, first quarter of 2014 (Night/ Guest)**

Nationality	Five stars	Four stars	Three Stars or less	Hotel apartments	Total
UAE	241,910	113,607	116,785	130,818	<b>603,120</b>
GCC	46,743	28,735	26,737	29,201	<b>131,416</b>
Other Arab countries	47,956	56,683	68,854	70,868	<b>244,361</b>
Asia (excluding Arab countries)	127,336	104,181	124,992	183,471	<b>539,980</b>
Australia and Asia Pacific	11,858	7,780	7,971	12,570	<b>40,179</b>
Africa (excluding Arab countries)	10,504	10,583	10,718	8,488	<b>40,293</b>
Europe	331,622	196,758	95,500	124,646	<b>748,526</b>
North and South America	73,388	45,331	29,651	59,896	<b>208,266</b>
Not mentioned	10,696	4,616	3,423	5,887	<b>24,622</b>
<b>Total</b>	<b>902,013</b>	<b>568,274</b>	<b>484,631</b>	<b>625,845</b>	<b>2,580,763</b>

Source: Abu Dhabi Tourism and Culture Authority

**Figure 2: Guest nights by nationality, first quarter of 2013- 2014**



## Average Length of Stay

The average length of stay decreased for all nationalities except guests from UAE in the first quarter of 2014 to 3.1 nights, a decrease of 8.0% compared with the first quarter of 2013. Guests from North and South Americas accounted for the largest percentage decrease with 18.6%, followed by guests from Asia (excluding Arab countries) with 17.2%, and guests from Africa (excluding Arab countries) with 16.4%.

The highest average length of stay in the first quarter of 2014 was recorded by guests from North and South Americas with 4.4 nights, followed by European guests with 4.3 nights. The lowest average length of stay was recorded by GCC guests at 2.2 nights, followed by UAE guests at 2.3 nights.

**Table 8: Average length of stay by nationality, first quarter of 2013- 2014 (Night/ Guest)**

Nationality	2013	2014	Change %
UAE	2.3	2.3	0.9
GCC	2.3	2.2	-0.5
Other Arab countries	2.9	2.7	-7.1
Asia (excluding Arab countries)	3.8	3.2	-17.2
Australia and Asia Pacific	4.0	3.7	-7.3
Africa (excluding Arab countries)	3.9	3.3	-16.4
Europe	4.6	4.3	-6.6
North and South America	5.4	4.4	-18.6
Not specified	2.8	2.6	-8.9
<b>Total</b>	<b>3.4</b>	<b>3.1</b>	<b>-7.9</b>

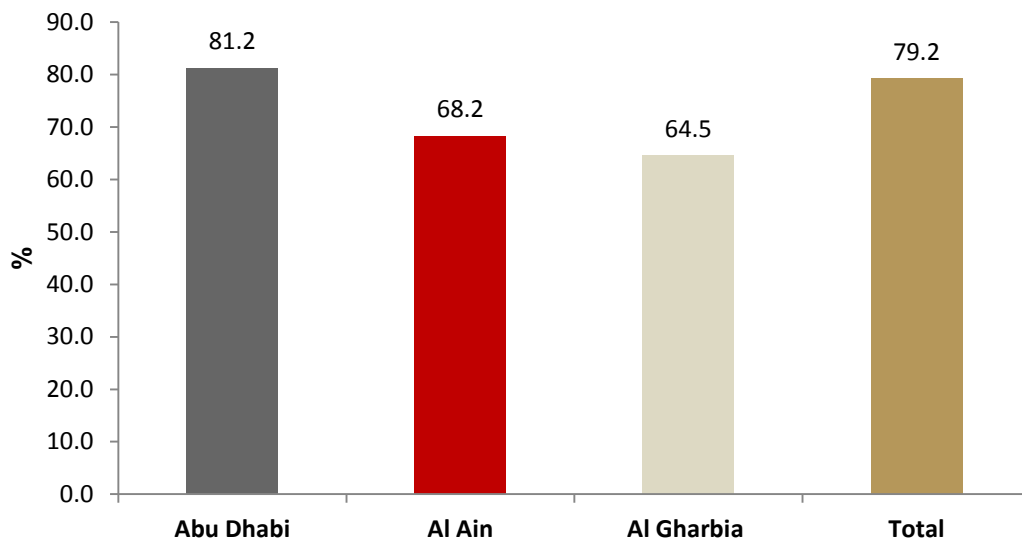
Source: Abu Dhabi Tourism and Cultural Authority

## Occupancy Rate

Occupancy rate is a significant hotel establishment indicator. The occupancy rate rose in the first quarter of 2014 by 7.8% compared with the same quarter in the previous year.

The occupancy rate in Abu Dhabi region (81.2%) was higher than in the Al Ain region (68.2%) and the Al Gharbia region (64.5%). Occupancy rates in hotel apartments (86.4%) was higher than in hotels (77.2%).

**Figure 3: Occupancy rate by region, first quarter of 2014**



## Revenues

The overall revenues of hotel establishments rose to AED 1.6 billion in the first quarter of 2014, an increase of 10.7% compared with the previous year.

**Table 9: Revenues of hotel establishments by type of revenue, first quarter of 2013-2014 (AED million)**

Revenue Type	2013	2014	Change %
Room	760.8	831.0	<b>9.2</b>
Food and beverages	538.8	595.4	<b>10.5</b>
Other revenues	132.6	158.7	<b>19.7</b>
<b>Total revenues</b>	<b>1,432.2</b>	<b>1,585.1</b>	<b>10.7</b>

Source: Abu Dhabi Tourism and Cultural Authority

Compared with the first quarter of 2013, revenues of food and beverages in hotel establishments increased 10.5% during the first quarter of 2014; contributing 37.6% of the total hotel revenues in the first quarter of 2014, while revenues of rooms increased by 9.2% over the same period, contributing 52.4% of the total hotel revenue.

## **Explanatory Notes**

**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, and 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.

