



مركز الإحصاء
STATISTICS CENTRE

Hotel Establishments Statistics

Third 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 the 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 long-term development plan of the emirate. Therefore, the Statistics Centre - Abu Dhabi (SCAD) attaches a great attention to measuring development indicators in the hotel sector.

This publication highlights the key tourism indicators in the third 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 (ADTCA) is the main source of the statistics included in this publication.

The "Explanatory Notes" section at the end of this publication 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 hotel establishment statistics will meet the requirements of planners, decision makers, researchers, academics and data users.

Key Points

- The number of hotel establishment guests rose by 23.2% in the third quarter of 2014 compared with the third quarter of 2013, reaching 798.5 thousand guests.
- UAE Nationals accounted for 34.7% of the guests in the third quarter of 2014, an increase of 18.0% compared with the third quarter of 2013.
- More than a third (38.8%) of guests stayed in five star hotels in the third quarter of 2014.
- Guest nights rose by 19.6% reaching 2.4 million nights in the third quarter of 2014.
- The average length of stay in the third quarter of 2014 was 2.9 days in the hotel establishment.
- The highest occupancy rate of 76.6% was recorded by hotel apartments compared with 63.3% for hotels in the third quarter of 2014.
- Hotel establishments' revenues rose by 16.4% from the third quarter of 2013 to the third quarter of 2014, reaching AED 1.2 billion.

Hotel Establishments

The number of hotel establishments' increased by 5.4% in third quarter of 2014 reaching 156, while the total number of rooms increased by 8.3%. The number of guests totaled 798.5 thousand in the third quarter of 2014, an increase of 23.2% compared with the third quarter of 2013. Guest nights totaled 2.4 million nights in the third quarter of 2014; an increase of 19.6% compared with the third quarter of 2013. The average length of stay declined by 3.3% to 2.9 days. The occupancy rate was 66.2% in the third quarter of 2014, an increase of 5.6% compared with the same quarter of 2013. The data also shows an increase in the average room revenues and an increase in the average revenues of available rooms.

Table 1: Key indicators of hotel establishments, third quarter of 2013 and 2014

| Indicator | 2013 | 2014 | Change % |
|---|---------|---------|----------|
| Number of hotel establishments | 148 | 156 | 5.4 |
| Number of rooms | 25,671 | 27,795 | 8.3 |
| Number of guests (thousand) | 648.4 | 798.5 | 23.2 |
| Number of guest nights (thousand) | 1,968.7 | 2,355.5 | 19.6 |
| Average length of stay (nights) | 3.0 | 2.9 | -3.3 |
| Occupancy rate (%) | 62.7 | 66.2 | 5.6 |
| Average room revenues (AED) | 355.8 | 355.9 | 0.0 |
| Average revenues of available rooms (AED/per night) | 223.2 | 235.6 | 5.5 |

Source: Abu Dhabi Tourism and Culture Authority

The average length of stay in hotel apartments was four days longer than hotels, and the occupancy rate in hotel apartments 76.6% was higher than hotels by 63.3% in the third quarter of 2014.

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

| Indicator | Hotels | Hotel apartments | Total |
|--|---------|------------------|----------------|
| Number of hotel establishments | 100 | 56 | 156 |
| Number of rooms | 21,723 | 6,072 | 27,795 |
| Number of guests (thousand) | 710.3 | 88.2 | 798.5 |
| Number of guest nights (thousand) | 1,754.3 | 601.2 | 2,355.5 |
| Average length of stay (nights) | 2.5 | 6.8 | 2.9 |
| Occupancy rate (%) | 63.3 | 76.6 | 66.2 |
| Average room revenues (AED) | 363.7 | 338.5 | 355.9 |
| Average revenues of available rooms (AED /per night) | 230.3 | 259.4 | 235.6 |

Source: Abu Dhabi Tourism and Culture Authority

The majority of guests stayed in the Abu Dhabi region with 87.9% of the total guests in the third quarter of 2014 compared with 9.8% in the Al Ain region and 2.3% in the Al Gharbia region. The average length of stay was 4.0 days in the Al Gharbia region, 3.0 days in the Abu Dhabi region and 2.1 days in Al Ain.

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

| Indicator | Abu Dhabi | Al Ain | Al Gharbia | Total |
|--|-----------|--------|------------|----------------|
| Number of guests (thousand) | 701.7 | 78.6 | 18.2 | 798.5 |
| Number of guest nights (thousand) | 2,120.7 | 161.9 | 72.9 | 2,355.5 |
| Average length of stay (nights) | 3.0 | 2.1 | 4.0 | 2.9 |
| Occupancy rate (%) | 66.8 | 58.2 | 65.9 | 66.2 |
| Average room revenues (AED) | 346.2 | 387.8 | 556.8 | 355.9 |
| Average revenues of available rooms (AED/ per night) | 231.2 | 225.8 | 366.6 | 235.6 |

Source: Abu Dhabi Tourism and Culture Authority

Number of Guests

The total number of guests grew to 798.5 thousand in the third quarter of 2014, an increase of 23.2% compared with the third quarter of 2013. UAE Nationals represented the largest share of guests in hotel establishments, accounting for about 34.7% of the total number of guests, followed by guests from Asia (excluding Arab countries) with 20.6%, and guests from Europe with 14.5%.

The number of guests increased for all nationalities, the largest percentage increase in the third quarter of 2014 was from North and South America with 34.6% compared with the third quarter of 2013, followed by guests from Australia and Asia Pacific with 33.7%. At the same time, the numbers of the GCC guests increased by 33.3%.

Table 4: Guests of hotel establishments by nationality, third quarter of 2013 and 2014

| Nationality | 2013 | 2014 | 2014 Share (%) | Change (%) |
|-----------------------------------|----------------|----------------|----------------|-------------|
| UAE | 234,759 | 277,031 | 34.7 | 18.0 |
| GCC | 53,852 | 71,781 | 9.0 | 33.3 |
| Other Arab countries | 80,405 | 94,372 | 11.8 | 17.4 |
| Asia (excluding Arab countries) | 125,566 | 164,200 | 20.6 | 30.8 |
| Australia and Asia Pacific | 12,148 | 16,237 | 2.0 | 33.7 |
| Africa (excluding Arab countries) | 10,363 | 12,563 | 1.6 | 21.2 |
| Europe | 95,231 | 116,144 | 14.5 | 22.0 |
| North and South America | 28,371 | 38,183 | 4.8 | 34.6 |
| Not mentioned | 7,698 | 8,026 | 1.0 | 4.3 |
| Total | 648,393 | 798,537 | 100.0 | 23.2 |

Source: Abu Dhabi Tourism and Culture Authority

More than a third of guests (38.8%) stayed in five stars hotels in the third quarter for 2014, followed by guests in four stars hotels with 27.9%, guests in three stars or less with 22.2% and guests in hotel apartments with 11.0%.

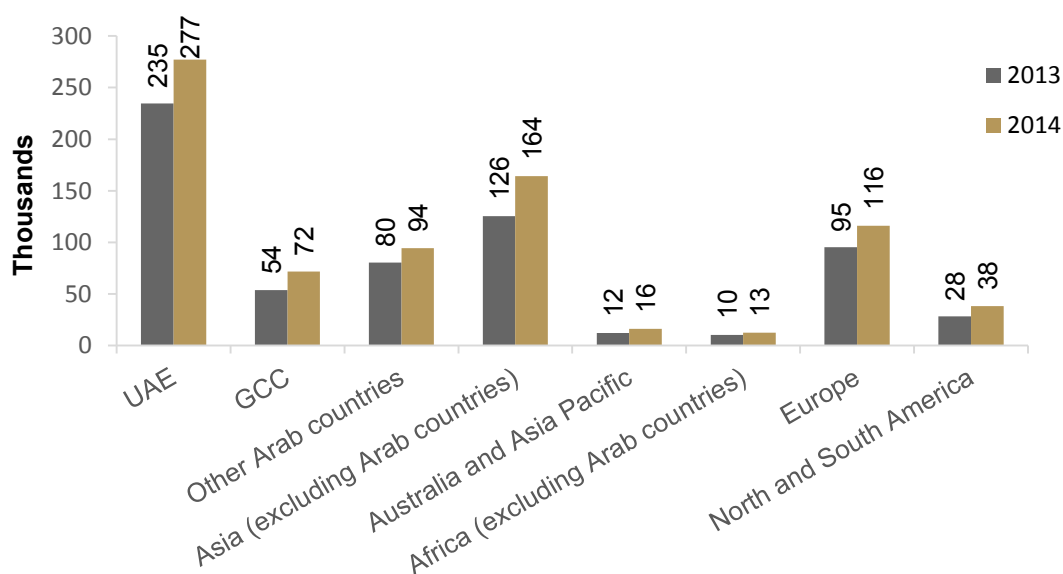
Table 5: Hotel guests by nationality and classification, third quarter of 2014

| Nationality | Five stars | Four stars | Three stars or less | Hotels apartments | Total |
|-----------------------------------|----------------|----------------|---------------------|-------------------|----------------|
| UAE | 125,477 | 73,745 | 48,822 | 28,987 | 277,031 |
| GCC | 26,088 | 17,649 | 17,777 | 10,267 | 71,781 |
| Other Arab countries | 24,210 | 30,673 | 27,533 | 11,956 | 94,372 |
| Asia (excluding Arab countries) | 47,913 | 45,252 | 49,606 | 21,429 | 164,200 |
| Australia and Asia Pacific | 7,160 | 4,308 | 3,816 | 953 | 16,237 |
| Africa (excluding Arab countries) | 2,686 | 5,125 | 2,999 | 1,753 | 12,563 |
| Europe | 56,824 | 32,818 | 19,134 | 7,368 | 116,144 |
| North and South America | 15,515 | 9,982 | 7,658 | 5,028 | 38,183 |
| Not mentioned | 4,218 | 2,974 | 336 | 498 | 8,026 |
| Total | 310,091 | 222,526 | 177,681 | 88,239 | 798,537 |

Source: Abu Dhabi Tourism and Culture Authority

Guests from the UAE preferred to stay in luxury hotels; 40.5% of them stayed in five stars hotels. With regard to guests from Europe, 18.3% of them stayed in five star hotels and 8.4% stayed in hotel apartments.

Figure 1: Number of guests by nationality, third quarter of 2013 and 2014



Source: Abu Dhabi Tourism and Culture Authority

Guest Nights

The number of guest nights totaled 2.4 million nights in the third quarter of 2014, an increase of 19.6% compared with the third quarter of 2013. Guest nights from Asia (Excluding Arab Countries) increased by 32.0%, followed by guests from Africa (excluding Arab countries) with a 31.3%, increase.

Table 6: Guest nights by nationality, third quarter of 2013 and 2014

| Nationality | 2013 | 2014 | 2014 % share | Change % |
|-----------------------------------|------------------|------------------|--------------|-------------|
| UAE | 551,418 | 640,338 | 27.2 | 16.1 |
| GCC | 120,318 | 154,495 | 6.6 | 28.4 |
| Other Arab countries | 213,531 | 245,299 | 10.4 | 14.9 |
| Asia (excluding Arab countries) | 368,774 | 486,698 | 20.7 | 32.0 |
| Australia and Asia Pacific | 39,524 | 49,104 | 2.1 | 24.2 |
| Africa (excluding Arab countries) | 31,865 | 41,847 | 1.8 | 31.3 |
| Europe | 462,120 | 523,559 | 22.2 | 13.3 |
| North and South America | 160,222 | 195,897 | 8.3 | 22.3 |
| Not mentioned | 20,943 | 18,295 | 0.8 | -12.6 |
| Total | 1,968,715 | 2,355,532 | 100.0 | 19.6 |

Source: Abu Dhabi Tourism and Culture Authority

Guests from Europe and the UAE represented half of the entire guest nights in the third quarter of 2014 with 27.2% and 22.2% respectively, followed by guests from Asia (excluding Arab countries) with 20.7%.

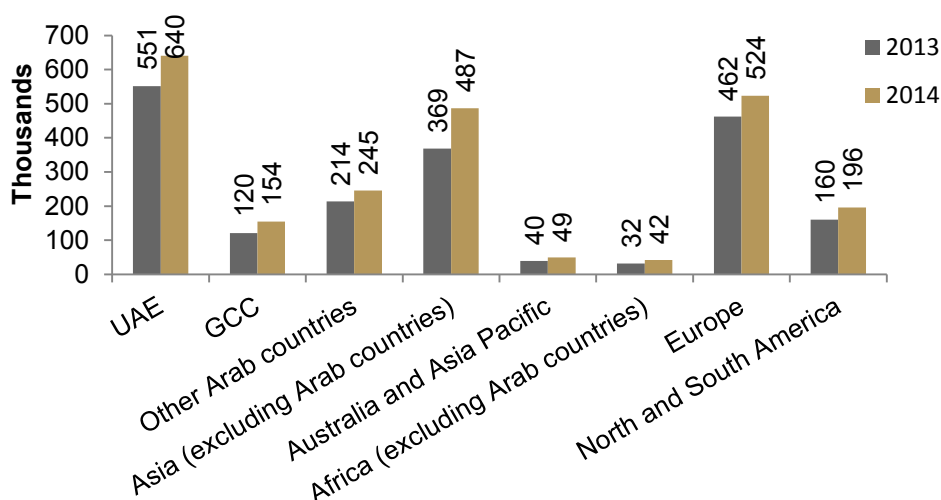
Table 7: Guest nights by nationality and classification, third quarter of 2014

| Nationality | Five stars | Four stars | Three Stars or less | Hotel apartments | Total |
|-----------------------------------|----------------|----------------|---------------------|------------------|------------------|
| UAE | 268,261 | 134,924 | 114,113 | 123,040 | 640,338 |
| GCC | 61,240 | 32,201 | 30,735 | 30,319 | 154,495 |
| Other Arab countries | 60,756 | 55,399 | 68,541 | 60,603 | 245,299 |
| Asia (excluding Arab countries) | 115,038 | 72,225 | 124,225 | 175,210 | 486,698 |
| Australia and Asia Pacific | 19,514 | 10,572 | 6,864 | 12,154 | 49,104 |
| Africa (excluding Arab countries) | 9,740 | 12,162 | 7,921 | 12,024 | 41,847 |
| Europe | 263,206 | 84,402 | 58,305 | 117,646 | 523,559 |
| North and South America | 65,263 | 43,063 | 20,902 | 66,669 | 195,897 |
| Not mentioned | 8,008 | 5,250 | 1,497 | 3,540 | 18,295 |
| Total | 871,026 | 450,198 | 433,103 | 601,205 | 2,355,532 |

Source: Abu Dhabi Tourism and Culture Authority

Guests from Africa (excluding Arab countries) and guests from Australia and Asia Pacific contributed the lowest share of guest nights with 1.8% and 2.1% respectively.

Figure 2: Guest nights by nationality, third quarter of 2013 and 2014



Source: Abu Dhabi Tourism and Culture Authority

Average Length of Stay

The average length of stay decreased in the third quarter of 2014 to 2.9 nights, a decrease of 3.3% compared with the third quarter of 2013. The decline included all nationalities except guests from Africa (excluding Arab countries) and Asia (excluding Arab countries) which rose by 8.3% and 0.9% respectively. Guests from North and South America accounted for the largest percentage decrease in the average length of stay with a 9.2% decrease, followed by guests from Europe with a 7.1% decrease, and guests from Australia and Asia Pacific with a 7.0% decrease.

The highest average length of stay in the third quarter of 2014 was recorded by guests from North and South America and from Europe with 5.1 and 4.5 nights respectively. 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, third quarter of 2013 and 2014 (Night/Guest)

| Nationality | 2013 | 2014 | Change % |
|-----------------------------------|------------|------------|-------------|
| UAE | 2.3 | 2.3 | -1.6 |
| GCC | 2.2 | 2.2 | -3.7 |
| Other Arab countries | 2.7 | 2.6 | -2.1 |
| Asia (excluding Arab countries) | 2.9 | 3.0 | 0.9 |
| Australia and Asia Pacific | 3.3 | 3.0 | -7.0 |
| Africa (excluding Arab countries) | 3.1 | 3.3 | 8.3 |
| Europe | 4.9 | 4.5 | -7.1 |
| North and South America | 5.6 | 5.1 | -9.2 |
| Not specified | 2.7 | 2.3 | -16.2 |
| Total | 3.0 | 2.9 | -3.3 |

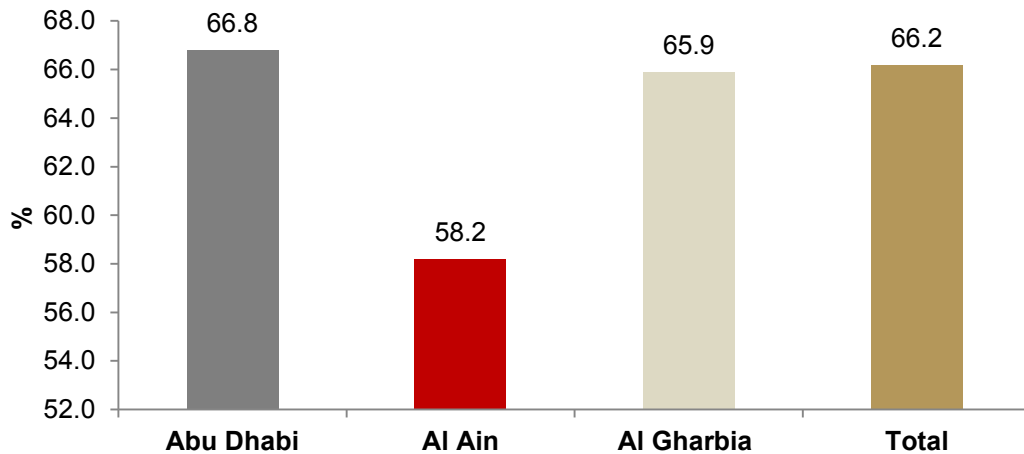
Source: Abu Dhabi Tourism and Culture Authority

Occupancy Rate

Occupancy rate is a significant hotel establishment indicator. The occupancy rate rose in the third quarter of 2014 by 5.6% compared with the same quarter in the previous year.

The occupancy rate in the Abu Dhabi region of 66.8% was higher than in the Al Ain region (58.2%) and the Al Gharbia region (65.9%). Occupancy rates in hotel apartments was 76.6% in the third quarter of 2014, and 63.3% in hotels.

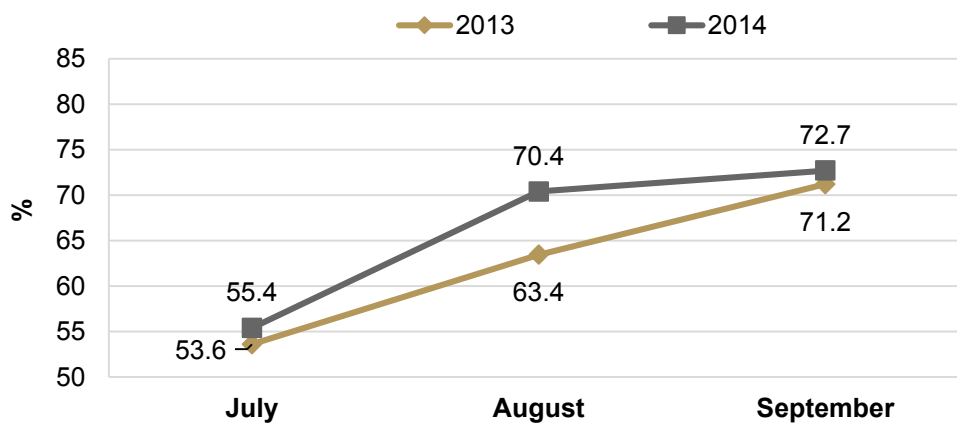
Figure 3: Occupancy rate by region, third quarter of 2014



Source: Abu Dhabi Tourism and Culture Authority

The data shows that the highest occupancy rate of 72.7%, in the third quarter of 2014, was reached during the month of September.

Figure 4: Occupancy rate of hotel establishment by month, third quarter of 2013 and 2014



Source: Abu Dhabi Tourism and Culture Authority

Revenues

The overall revenues of hotel establishments rose to AED 1.2 billion in the third quarter of 2014, an increase of 16.4% compared with the previous year.

Table 9: Revenues of hotel establishments by type of revenue, third quarter of 2013 and 2014 (AED million)

| Revenue Type | 2013 | 2014 | Change % |
|-----------------------|----------------|----------------|-------------|
| Room | 503.9 | 592.0 | 17.5 |
| Food and beverages | 398.3 | 444.9 | 11.7 |
| Other revenues | 110.8 | 142.4 | 28.5 |
| Total revenues | 1,012.9 | 1,179.4 | 16.4 |

Source: Abu Dhabi Tourism and Culture Authority

Compared with the third quarter of 2013, revenues of rooms in hotel establishments increased by 17.5% during the third quarter of 2014; contributing 50.2% of the total hotel revenues in the third quarter of 2014, while revenue from food and beverages increased by 11.7% over the same period, contributing 37.7% of the total hotel revenue.

Explanatory Notes

Glossary

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

Occupancy rate: is the total hotel rooms occupied divided by the total number of rooms available.

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

Reference period

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

