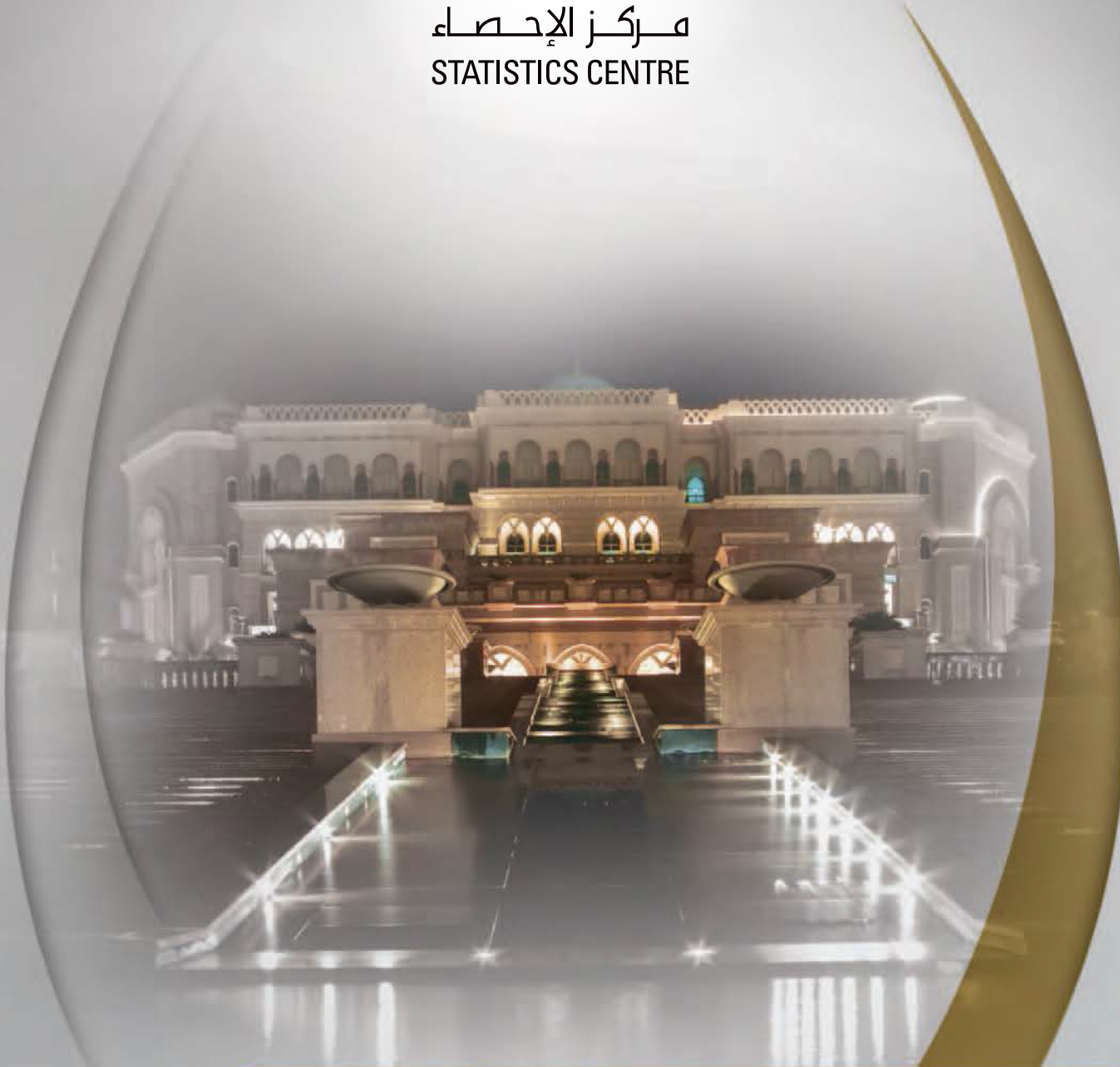




مركز الإحصاء
STATISTICS CENTRE



Hotel Establishments Statistics

First Half, 2014

September 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 half 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 half of 2014 rose by 27.5% compared with the first half of 2013 reaching 1,700.1 thousand guests.
- UAE Nationals accounted for 33.4% of the guests in the first half of 2014, an increase of 25.1% compared with the first half of 2013.
- More than a third by 37.8% of guests stayed in five star hotels in the first half of 2014.
- Guest nights rose by 21.8% reaching 5.1 million nights in the first half of 2014.
- The average length of stay in the first half of 2014 was 3.0 days.
- The highest occupancy rate of 85.3% was recorded by hotel apartments compared with 74.3% for hotels in the first half of 2014.
- Hotel establishments' revenues rose by 14.5% from the first half of 2013 to the first half of 2014 reaching AED 3.1 billion.

Hotel Establishments

The number of hotel establishments' increased by 6.2% in first half of 2014 reaching 154, while the total number of rooms increased by 8.4%. The number of guests totaled 1,700.1 thousand in first half of 2014, an increase of 27.5% compared with the first half of 2013. Guest nights totaled 5.1 million nights in the first half of 2014; an increase of 21.8% compared with the first half of 2013. The average length of stay declined by 4.4% to 3.0 days. The occupancy rate was 76.6% in the first half of 2014, an increase of 8.3% compared with the same half 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 half of 2013- 2014

Indicator	2013	2014	Change %
Number of hotel establishments	145	154	6.2
Number of rooms	25,270	27,405	8.4
Number of guests (thousand)	1,333.3	1,700.1	27.5
Number of guest nights (thousand)	4,226.6	5,147.4	21.8
Average length of stay (nights)	3.2	3.0	-4.4
Occupancy rate (%)	70.7	76.6	8.3
Average room revenues (AED)	447.5	432.1	-3.4
Average revenues of available rooms (AED/per night)	316.4	331.1	4.6

Source: Abu Dhabi Tourism and Cultural Authority

The average length of stay in hotel apartments was three days longer than hotels, and the occupancy rate in hotel apartments 85.3% was higher than hotels by 74.3% in the first half of 2014.

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

Indicator	Hotels	Hotel apartments	Total
Number of hotel establishments	100	54	154
Number of rooms	21,725	5,680	27,405
Number of guests (thousand)	1,507.8	192.3	1,700.1
Number of guest nights (thousand)	3,922.1	1,225.3	5,147.4
Average length of stay (nights)	2.6	6.4	3.0
Occupancy rate (%)	74.3	85.3	76.6
Average room revenues (AED)	458.9	344.7	432.1
Average revenues of available rooms (AED /per night)	341.0	294.2	331.1

Source: Abu Dhabi Tourism and Cultural Authority

The majority of guests stayed in the Abu Dhabi region with 83.3% of the total guests in the first half of 2014 compared with 10.1% in the Al Ain region and 6.6% in the Al Gharbia region. The average length of stay was 3.2 days in the Abu Dhabi region, 2.0 days in Al Ain region and 2.7 days in Al Gharbia.

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

Indicator	Abu Dhabi	Al Ain	Al Gharbia	Total
Number of guests (thousand)	1,416.4	171.5	112.2	1,700.1
Number of guest nights (thousand)	4,502.5	346.6	298.3	5,147.4
Average length of stay (nights)	3.2	2.0	2.7	3.0
Occupancy rate (%)	78.3	65.9	64.7	76.6
Average room revenues (AED)	419.3	413.7	665.1	432.1
Average revenues of available rooms (AED/ per night)	328.5	272.5	430.6	331.1

Source: Abu Dhabi Tourism and Cultural Authority

Number of Guests

The total number of guests grew to 1,700.1 thousand in the first half of 2014, an increase of 27.5% compared with the first half of 2013. UAE Nationals formed the largest segment of guests in hotel establishments, accounting for about 33.4% of the total number of guests, followed by Asia (excluding Arab countries) guests with 20.4%. The numbers of European guests increased in the same period by 18.8%.

The number of guests increased for all nationalities, the largest percentage increase in the first half of 2014 was from North and South America with 42.7% compared with the first half of 2013, followed by guests from Asia (Excluding Arab Countries) with 41.3%. At the same time, the numbers of the Africa (Excluding Arab Countries) guests increased by 39.3%.

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

Nationality	2013	2014	2014 Share (%)	Change (%)
UAE	454,353	568,285	33.4	25.1
GCC	88,195	110,523	6.5	25.3
Other Arab countries	160,551	193,750	11.4	20.7
Asia (excluding Arab countries)	245,804	347,302	20.4	41.3
Australia and Asia Pacific	22,586	25,168	1.5	11.4
Africa (excluding Arab countries)	17,859	24,876	1.5	39.3
Europe	262,427	319,751	18.8	21.8
North and South America	63,767	90,971	5.4	42.7
Not mentioned	17,797	19,509	1.1	9.6
Total	1,333,339	1,700,135	100.0	27.5

Source: Abu Dhabi Tourism and Cultural Authority

More than a third of guests was 37.8% stayed in five stars hotels in the first half for 2014, followed by guests in four stars hotels with 27.2%, guests in three stars or less with 23.7% and guests in hotel apartments with 11.3%.

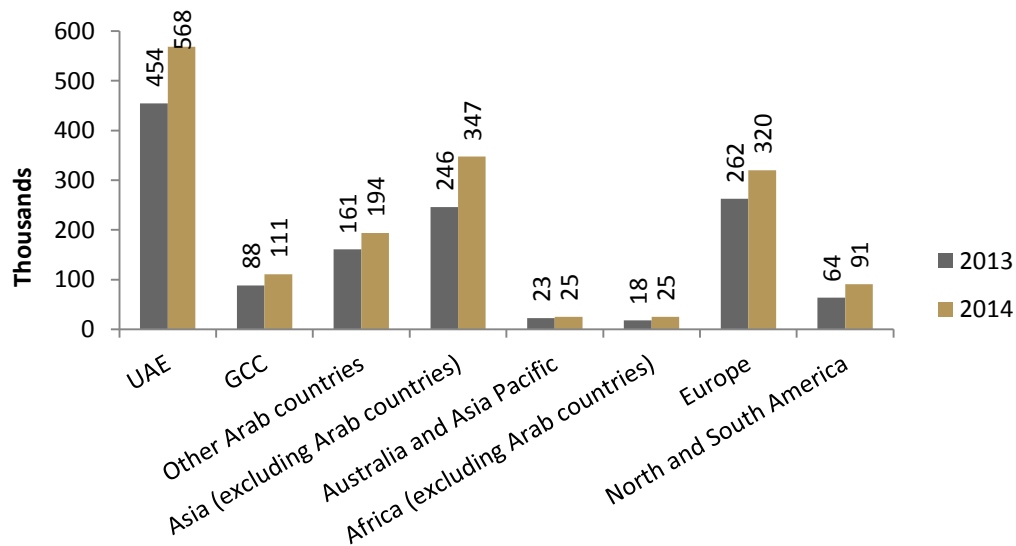
Table 5: Hotel guests by nationality and classification, first half of 2014

Nationality	Five stars	Four stars	Three stars or less	Hotels apartments	Total
UAE	249,836	141,347	110,899	66,203	568,285
GCC	38,841	29,158	26,065	16,459	110,523
Other Arab countries	40,608	57,329	64,904	30,909	193,750
Asia (excluding Arab countries)	98,351	94,509	107,809	46,633	347,302
Australia and Asia Pacific	10,077	6,688	6,297	2,106	25,168
Africa (excluding Arab countries)	5,482	9,491	7,513	2,390	24,876
Europe	149,421	93,910	59,139	17,281	319,751
North and South America	39,474	24,515	17,956	9,026	90,971
Not mentioned	9,807	5,965	2,490	1,247	19,509
Total	641,897	462,912	403,072	192,254	1,700,135

Source: Abu Dhabi Tourism and Cultural Authority

Guests from Europe preferred to stay in luxury hotels; around half of them was 46.7% stayed in five stars hotels. With regard to guests from other Arab countries, 33.5% of them stayed in three star hotels or less and 21.0% in five star hotels.

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



Guest Nights

The number of guest nights totaled 5.1 million nights in the first half of 2014, an increase of 21.8% compared with the first half of 2013. Guest nights from the Asia (Excluding Arab Countries) contributed the largest share of the rise with 28.5%, followed by guests from Africa (excluding Arab countries) with 24.5%.

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

Nationality	2013	2014	2014 % share	Change %
UAE	1,035,457	1,286,596	25.0	24.3
GCC	197,208	243,817	4.7	23.6
Other Arab countries	437,647	505,385	9.8	15.5
Asia (excluding Arab countries)	844,042	1,084,708	21.1	28.5
Australia and Asia Pacific	78,179	89,934	1.7	15.0
Africa (excluding Arab countries)	62,891	78,279	1.5	24.5
Europe	1,195,816	1,402,128	27.2	17.3
North and South America	330,067	403,569	7.8	22.3
Not mentioned	45,297	52,976	1.0	17.0
Total	4,226,604	5,147,392	100.0	21.8

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 half of 2014 with 27.2% and 25.0% respectively.

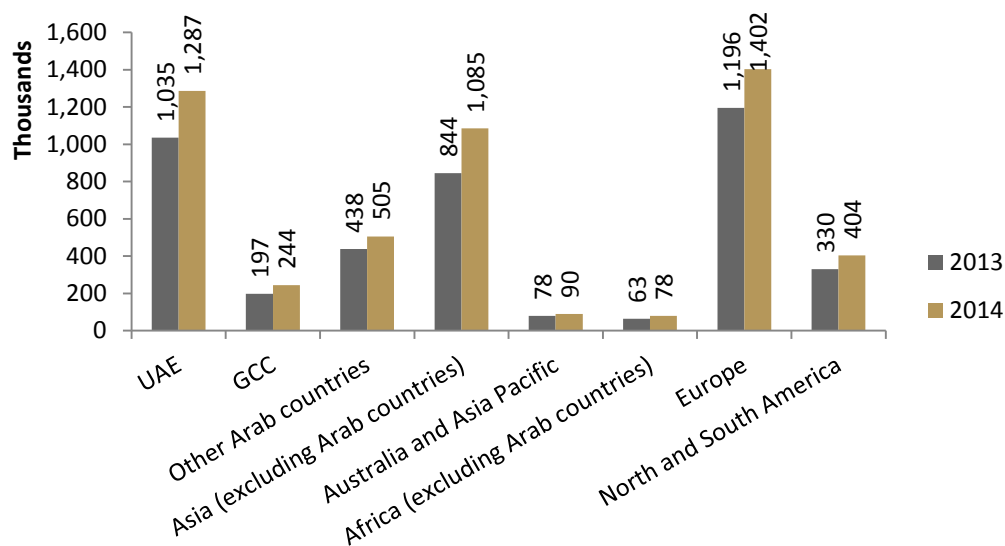
Guests from Africa (excluding Arab countries) and guests from Australia and Asia Pacific contributed the lowest share of guest nights with 1.5% and 1.7% respectively.

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

Nationality	Five stars	Four stars	Three Stars or less	Hotel apartments	Total
UAE	530,518	255,970	240,605	259,503	1,286,596
GCC	90,216	52,938	48,280	52,383	243,817
Other Arab countries	99,262	122,899	143,703	139,521	505,385
Asia (excluding Arab countries)	250,647	208,311	262,660	363,090	1,084,708
Australia and Asia Pacific	28,103	18,879	16,126	26,826	89,934
Africa (excluding Arab countries)	19,384	21,320	20,385	17,190	78,279
Europe	628,173	355,716	181,912	236,327	1,402,128
North and South America	140,955	88,028	56,295	118,291	403,569
Not mentioned	20,673	11,792	8,346	12,165	52,976
Total	1,807,931	1,135,853	978,312	1,225,296	5,147,392

Source: Abu Dhabi Tourism and Culture Authority

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



Average Length of Stay

The average length of stay decreased for all nationalities except guests from Australia and Asia Pacific in the first half of 2014 to 3.0 nights, a decrease of 4.4% compared with the first half of 2013. Guests from North and South Americas accounted for the largest percentage decrease with 14.3%, followed by guests from Africa (excluding Arab countries) with 10.6%, and guests from Asia (excluding Arab countries) with 9.0%.

The highest average length of stay in the first half of 2014 was recorded by guests from North and South Americas and European guests with 4.4 nights for each. 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 half of 2013- 2014 (Night/ Guest)

Nationality	2013	2014	Change %
UAE	2.3	2.3	-0.7
GCC	2.2	2.2	-1.3
Other Arab countries	2.7	2.6	-4.3
Asia (excluding Arab countries)	3.4	3.1	-9.0
Australia and Asia Pacific	3.5	3.6	3.2
Africa (excluding Arab countries)	3.5	3.1	-10.6
Europe	4.6	4.4	-3.8
North and South America	5.2	4.4	-14.3
Not specified	2.5	2.7	6.7
Total	3.2	3.0	-4.4

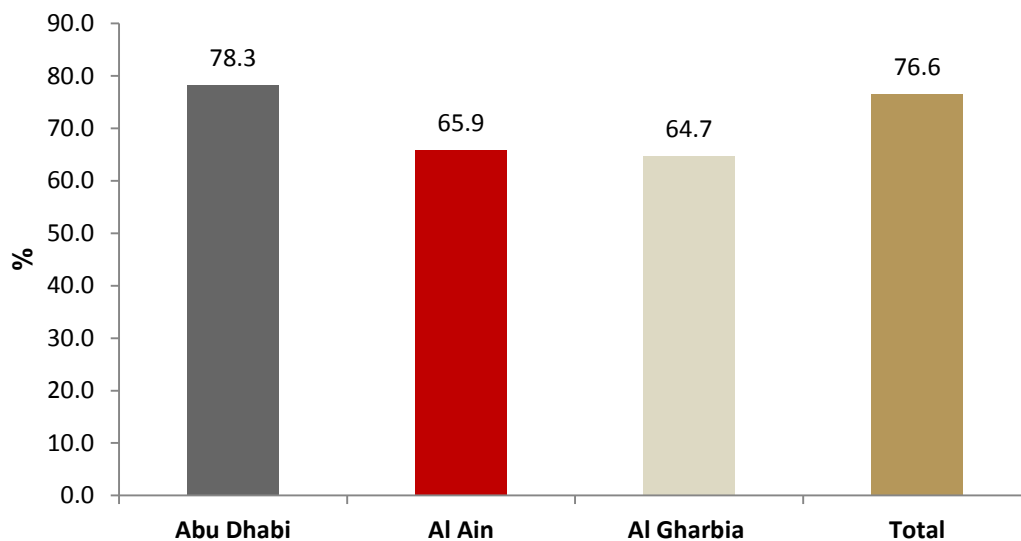
Source: Abu Dhabi Tourism and Cultural Authority

Occupancy Rate

Occupancy rate is a significant hotel establishment indicator. The occupancy rate rose in the first half of 2014 by 8.4% compared with the same half in the previous year.

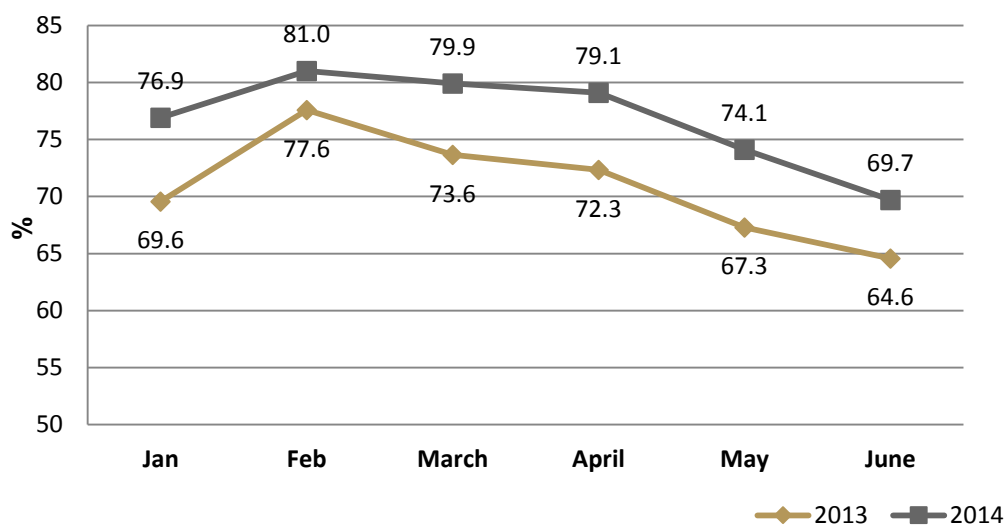
The occupancy rate in Abu Dhabi region by 78.3% was higher than in the Al Ain region and the Al Gharbia region. Occupancy rates in hotel apartments by 85.3% was higher than in hotels in the first half of 2014.

Figure 3: Occupancy rate by region, first half of 2014



The data shows that the highest occupancy rate in first half of 2014 was reaching the highest level in February at 81.0%, and then the occupancy rate dropped to 69.7% in June.

Figure 4: Occupancy rate by month, first half of 2014



Revenues

The overall revenues of hotel establishments rose to AED 3.1 billion in the first half of 2014, an increase of 14.5% compared with the previous year.

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

Revenue Type	2013	2014	Change %
Room	1,372.7	1,578.5	14.9
Food and beverages	1,055.8	1,181.3	11.9
Other revenues	268.9	329.4	22.5
Total revenues	2,697.4	3,089.2	14.5

Source: Abu Dhabi Tourism and Cultural Authority

Compared with the first half of 2013, revenues of rooms in hotel establishments increased 14.9% during the first half of 2014; contributing 51.1% of the total hotel revenues in the first half of 2014, while food and beverages increased by 11.9% over the same period, contributing 38.2% 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.

