



مركز الإحصاء
STATISTICS CENTRE



Hotel Establishments Statistics

First Quarter, 2013

June 2013

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Introduction

This publication presents statistics on hotel establishments in the Emirate of Abu Dhabi; it is showing the number of guests, guest nights and average length of stay. Furthermore, the hotel establishments' statistics highlight occupancy rate and revenues generated by rooms and restaurants. The Abu Dhabi Tourism and Culture Authority is the main source of the statistics in this publication.

Hotel establishments' statistics provide governments with information needed to create plans and policies that meet current and future needs, in addition to providing data to academics and researchers.

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.

Key Points

- The number of hotel establishments' guests in the first quarter of 2013 rose by 6.1% compared with the first quarter of 2012 reaching 631.4 thousand guests.
- Emirati guests in the first quarter of 2013 accounted for 32.1%, a decline of 4.7% compared with the first quarter of 2012
- More than a third (36.8%) of guests stayed in five star hotels.
- Guest nights rose by 22.8% reaching 2.1 million nights in the first quarter of 2013.
- The average length of stay in the first quarter of 2013 was 3.4 days compared with 2.9 days in the first quarter of 2012.
- The highest occupancy rate of 82.5% was recorded by hotel apartments compared with 70.8% for hotels.
- Hotel establishments' revenues in the first quarter of 2013 rose by 15.1% compared with the first quarter of 2012 reaching AED 1.4 billion.

Hotel Establishments

The number of hotel establishments in the first quarter of 2013 rose by 6.1% compared with the first quarter of 2012. Occupancy rate and average length of stay for the same period rose by 8.0% and 15.7% respectively.

Table 1: Key indicators of hotel establishments, first quarter of 2012- 2013

Indicator	2012	2013	Change %
Number of guests (thousand)	594.9	631.4	6.1
Number of guest nights (thousand)	1,725	2,119	22.8
Average length of stay (nights)	2.9	3.4	15.7
Occupancy rate (%)	68.0	73.5	8.0
Average room revenues (AED)	500.0	488.7	-2.3
Average revenues of available rooms (AED/per night)	340.2	359.2	5.6

Source: Abu Dhabi Tourism and Cultural Authority

The number of guests in the first quarter of 2013 totaled 631.4 thousand, an increase of 6.1% compared with the first quarter of 2012. The occupancy rate was 73.5%, an increase of 8%. Guest nights increased by 22.8% reaching 2.12 million.

The average length of stay in hotel apartments was three days longer than hotels, and the occupancy rate in hotel apartments (82.5%) was higher than hotels (70.8%).

Table 2: Key indicators of hotel establishments by type, first quarter of 2013

Indicator	Hotels	Hotel apartments	Total
Number of guests (thousand)	540	91.3	631.4
Number of guest nights (thousand)	1,563	556	2,119
Average length of stay (nights)	2.9	6.1	3.4
Occupancy rate (%)	70.8	82.5	73.5
Average room revenues (AED)	536.3	351.8	488.7
Average revenues of available rooms (AED /per night)	379.7	290.1	359.2

Source: Abu Dhabi Tourism and Cultural Authority

The majority of guests stayed in the Abu Dhabi region with 84.2% of the total guests in the first quarter of 2013 compared with 11.8% in the Al Ain region and 4.0% in the Al Gharbia region. The average length of stay was 3.57 days in the Abu Dhabi region, 2.03 days in the Al Ain region and 2.84 day in the Al Gharbia region.

Table 3: Key indicators of hotel establishments by region, first quarter of 2013

Indicator	Abu Dhabi	Al Ain	Al Gharbia	Total
Number of guests (thousand)	531.6	74.7	25.2	631.4
Number of guest nights (thousand)	1,896	151.6	71.4	2,119
Average length of stay (nights)	3.6	2.0	2.8	3.4
Occupancy rate (%)	74.9	64.3	57.8	73.5
Average room revenues (AED)	484.2	427.2	752.6	488.7
Average revenues of available rooms (AED/ per night)	362.8	274.8	434.6	359.2

Source: Abu Dhabi Tourism and Cultural Authority

Number of Guests

The total number of guests grew to 631.4 thousand in the first quarter of 2013, an increase of 6.1% compared with the first quarter of 2012. UAE Nationals formed the largest segment of guests in hotel establishments, accounting for about 32.1% of the total number of guests, followed by European guests with 21.6%.

The number of guests increased for all nationalities, excluding UAE nationals and GCC countries; the largest increase in the first quarter of 2013 was from Africa (Excluding Arab Countries) with 24.3% compared with the first quarter of 2012, followed by guests from Asia (Excluding Arab Countries) with 19.0%. Meanwhile, the numbers of UAE guests decreased in the same period by 4.8% and GCC countries by 1.2%.

Table 4: Guests of hotel establishments by nationality, first quarter of 2012-2013

Nationality	2012	2013	2013 % share	Change %
UAE	212,597	202,506	32.1	-4.7
GCC	45,823	45,295	7.2	-1.2
Other Arab countries	65,139	72,107	11.4	10.7
Asia (excluding Arab countries)	97,954	116,586	18.5	19.0
Australia and Asia Pacific	8,046	9,416	1.5	16.8
Africa (excluding Arab countries)	6,702	8,328	1.3	24.3
Europe	123,710	136,079	21.6	10.0
North and South America	30,319	32,242	5.1	6.3
Not mentioned	4,610	8,858	1.4	92.1
Total	594,918	631,417	100.0	6.1

Source: Abu Dhabi Tourism and Cultural Authority

Guests in five stars hotels accounted for 36.8%, followed by guests in four stars hotels with 28.6%, guests in three stars or less with 20.2% and guests in hotel apartments with 14.5%.

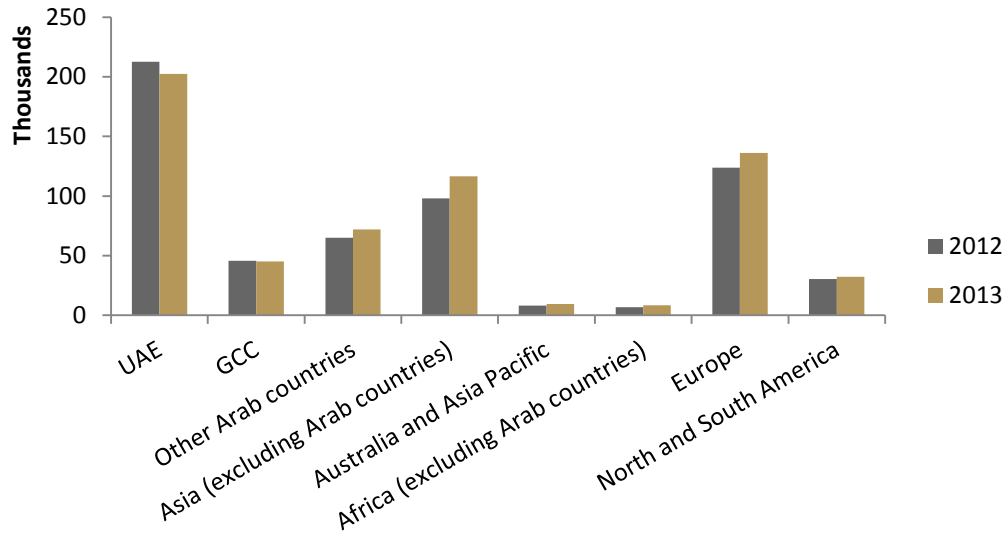
Table 5: Hotel guests by nationality and classification, first quarter of 2013

Nationality	Five stars	Four stars	Three stars or less	Hotels apartments	Total
UAE	79,292	45,846	45,644	31,724	202,506
GCC	15,415	10,217	9,705	9,958	45,295
Other Arab countries	15,999	21,704	19,526	14,878	72,107
Asia (excluding Arab countries)	30,527	35,964	28,772	21,323	116,586
Australia and Asia Pacific	3,966	3,564	1,046	840	9,416
Africa (excluding Arab countries)	2,126	3,443	1,679	1,080	8,328
Europe	67,154	45,213	15,927	7,785	136,079
North and South America	15,397	9,758	4,012	3,075	32,242
Not mentioned	2,437	4,719	1,028	674	8,858
Total	232,313	180,428	127,339	91,337	631,417

Source: Abu Dhabi Tourism and Cultural Authority

Guests from Europe preferred to stay in luxury hotels; 49.4% of them stayed in five stars hotels. With regard to guests from other Arab countries, 22.2% of them stayed in five stars hotels and 20.6% in hotels apartments.

Figure 1: Number of guests by nationality, first quarter of 2012-2013



Guest Nights

The number of guest nights totaled 2.1 million nights in the first quarter of 2013, an increase of 22.8% compared with the first quarter of 2012. Guest nights from Africa (excluding Arab countries) contributed the largest share of the rise with 54.9%, followed by guests from Asia (excluding Arab countries) with 46.5%.

Table 6: Guest nights by nationality, first quarter of 2012- 2013

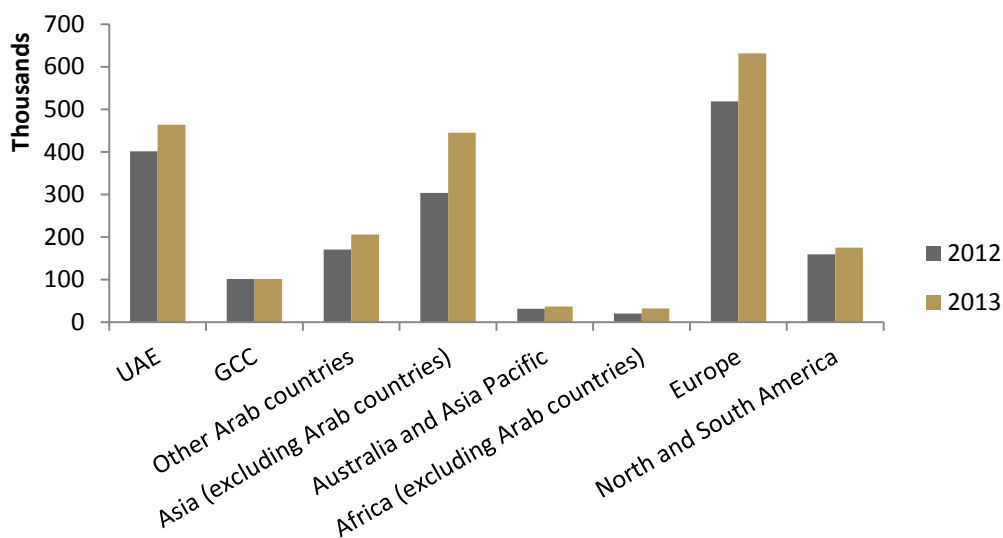
Nationality	2012	2013	2013 % share	Change %
UAE	401,347	464,048	21.9	15.6
GCC	101,587	101,916	4.8	0.3
Other Arab countries	170,874	206,317	9.7	20.7
Asia (excluding Arab countries)	303,978	445,306	21.0	46.5
Australia and Asia Pacific	31,685	37,359	1.8	17.9
Africa (excluding Arab countries)	20,923	32,419	1.5	54.9
Europe	518,577	631,234	29.8	21.7
North and South America	159,486	175,268	8.3	9.9
Not mentioned	16,619	25,149	1.2	51.3
Total	1,725,076	2,119,016	100.0	22.8

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 quarter of 2013 with 29.8% and 21.9% respectively.

Guests from Africa (excluding Arab countries) contributed the lowest share of guest nights with 1.5%, followed by guests from Australia and Asia Pacific with 1.8%.

Figure 2: Guest nights by nationality, first quarter of 2012- 2013



Average Length of Stay

The average length of stay increased for all nationalities in the first quarter of 2013 to 3.36 nights, an increase of 3.7% compared with the first quarter of 2012. Guests from Africa (Excluding Arab Countries) accounted for the highest increase with 24.7%, followed by guests from Asia (excluding Arab countries) with 23.1%, and guests from UAE with 21.4%.

The highest average length of stay in the first quarter of 2013 was recorded by guests from North and South Americas with 5.44 nights, followed by European guests with 4.64 nights. The lowest average length of stay was recorded by GCC guests at 2.25 nights, followed by UAE guests at 2.29 nights.

**Table 7: Average length of stay by nationality, first quarter of 2012- 2013
(Night/ Guest)**

Nationality	2012	2013	Change %
UAE	1.89	2.29	21.4
GCC	2.22	2.25	1.5
Other Arab countries	2.62	2.86	9.1
Asia (excluding Arab countries)	3.10	3.82	23.1
Australia and Asia Pacific	3.93	3.97	1.0
Africa (excluding Arab countries)	3.12	3.89	24.7
Europe	4.19	4.64	10.7
North and South America	5.26	5.44	3.3
Not specified	3.60	2.84	-21.2
Total	2.90	3.36	15.9

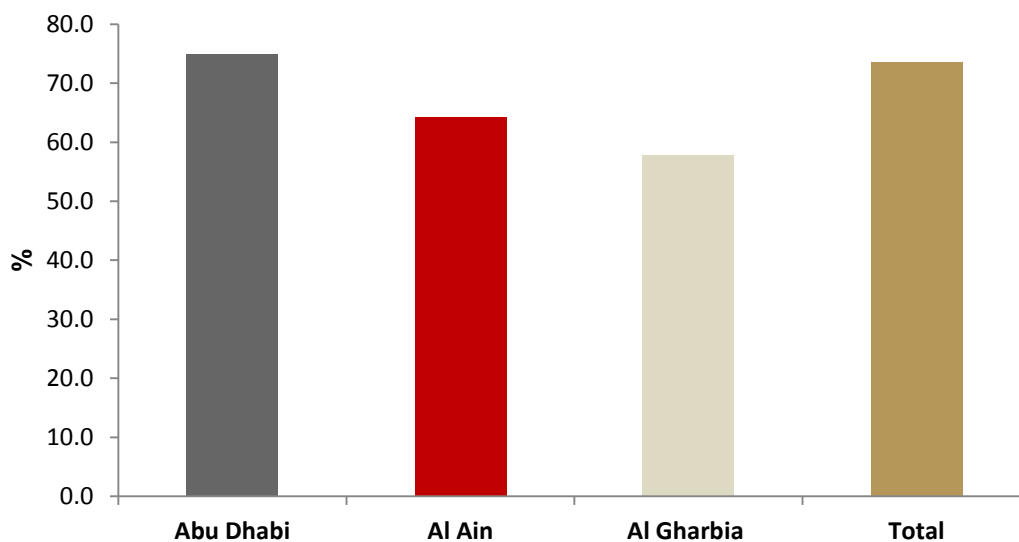
Source: Abu Dhabi Tourism and Cultural Authority

Occupancy Rate

Occupancy rate is a significant hotel establishments indicator. The occupancy rate rose in the first quarter of 2013 by 8.0% compared with the same quarter in the previous year.

The occupancy rate in Abu Dhabi region (74.9%) was higher than in the Al Ain region (64.3%) and the Al Gharbia region (57.8%). Occupancy rates in hotel apartments (82.5%) was higher than in hotels (70.8%).

Figure 3: Occupancy rate by region, first quarter of 2013



Revenues

The overall revenues of hotel establishments rose to AED 1.4 billion in the first quarter of 2013, an increase of 15.1% compared with the previous year.

Table 8: Revenues of hotel establishments by type of revenue, first quarter of 2012- 2013 (AED million)

Revenue Type	2012	2013	Change %
Room	643.9	760.8	18.2
Food and beverages	479.1	538.8	12.5
Other revenues	121.7	132.5	8.8
Total revenues	1,244.7	1,432.1	15.1

Source: Abu Dhabi Tourism and Cultural Authority

Compared with the first quarter of 2012, revenues of food and beverages in hotel establishments increased 12.5% during the first quarter of 2013; contributing 37.6% of the total hotel revenues,

while revenues of rooms increased by 18.2% over the same period, contributing 53.1% of the total hotel revenues.

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, 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.

