



مركز الإحصاء
STATISTICS CENTRE



Hotel Establishments Statistics



2015
First Quarter

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Introduction

Tourism and Hotel Establishments' statistics have an economic importance as the government of Abu Dhabi identified the tourism sector as one of the development catalysts within the Abu Dhabi Vision 2030 to increase revenue and develop the non-oil economic activities. The tourism sector has been included in the ten focus sectors of the five-year plan for the development of the Emirate. In support of these plans, the Statistics Centre - Abu Dhabi (SCAD) collect, compile and disseminate development indicators in the hotel sector.

This publication highlights the key hotel establishment indicators in the first quarter of 2015 and 2014, 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 these statistics.

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 it will meet the requirements of planners, decision makers, researchers, and other users.

Key Points

- The number of hotel establishment guests increased by 19.9% from the first quarter of 2014 to the first quarter of 2015 to 1.0 million guests.
- UAE Nationals represented for 31.9% of the total number of guests in the first quarter of 2015, an increase of 22.5% compared with the first quarter of 2014.
- Of the total number of guests, 40.1% stayed in five star hotels in the first quarter of 2015.
- Guest nights increased by 11.3% to 2.9 million nights in the first quarter of 2015.
- The average length of stay in the first quarter of 2015 was 2.9 days compared with 3.1 days in 2014.
- The highest occupancy rate of 84.5% was recorded by hotel apartments compared with 77.8% for hotels in the first quarter of 2015.
- Hotel establishments' revenues rose by 14.2% from the first quarter of 2014 to the first quarter of 2015 to AED 1.8 billion.

Hotel Establishments

The number of hotel establishments' increased by 5.9% in first quarter of 2015 to 161, while the total number of rooms increased by 7.1%. The number of guests increased by 19.9% from 834.8 thousand in the first quarter of 2014 to 1.0 million in the first quarter of 2015.

Guest nights totaled 2.9 million nights in the first quarter of 2015; an increase of 11.3% compared with the first quarter of 2014. The average length of stay decreased by 7.1% to 2.9 days. The occupancy rate was 79.3% in the first quarter of 2015, an increase of 0.3% compared with the same quarter of 2014. 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, first quarter of 2014 and 2015

Indicator	2014	2015	Change %
Number of hotel establishments	152	161	5.9
Number of rooms	26,811	28,726	7.1
Number of guests (thousand)	834.8	1,001.1	19.9
Number of guest nights (thousand)	2,580.8	2,873.2	11.3
Average length of stay (nights)	3.1	2.9	-7.1
Occupancy rate (%)	79.2	79.3	0.3
Average room revenues (AED)	454.5	483.5	6.4
Average revenues of available rooms (AED/per night)	360.1	383.5	6.5

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 (84.5%) was higher than hotels (77.8%) in the first quarter of 2015.

Table 2 : Key indicators of hotel establishments by type, first quarter of 2015

Indicator	Hotels	Hotel apartments	Total
Number of guests (thousand)	894.4	106.7	1,001.1
Number of guest nights (thousand)	2,178.8	694.4	2,873.2
Average length of stay (nights)	2.4	6.5	2.9
Occupancy rate (%)	77.8	84.5	79.3
Average room revenues (AED)	518.8	369.5	483.5
Average revenues of available rooms (AED /per night)	403.8	312.4	383.5

Source: Abu Dhabi Tourism and Culture Authority

The majority of guests stayed in the Abu Dhabi region with 87.0% of the total guests in the first quarter of 2015 compared with 9.8% in the Al Ain region and 3.2% in the Al Gharbia region. The average length of stay was 3.0 days in the Abu Dhabi region, 2.8 days in Al Gharbia and 2.0 days in the Al Ain region.

Table 3 : Key indicators of hotel establishments by region, first quarter of 2015

Indicator	Abu Dhabi	Al Ain	Al Gharbia	Total
Number of guests (thousand)	871.0	97.7	32.4	1,001.1
Number of guest nights (thousand)	2,586.3	195.3	91.6	2,873.2
Average length of stay (nights)	3.0	2.0	2.8	2.9
Occupancy rate (%)	80.4	71.6	67.2	79.3
Average room revenues (AED)	476.7	402.6	842.2	483.5
Average revenues of available rooms (AED/ per night)	383.2	288.2	565.9	383.5

Source: Abu Dhabi Tourism and Culture Authority

Number of Guests

The total number of guests increased to 1.0 million in the first quarter of 2015, an increase of 19.9% compared with the first quarter of 2014. UAE Nationals represented the largest segment of guests in hotel establishments, accounting for 31.9% of the total number of guests, followed by Asia (excluding Arab countries) guests with 21.6%. The percentage share of European guests increased in the same period to 19.8%.

The number of guests increased for all nationalities, the largest percentage increase in the first quarter of 2015 was from North and South America with 28.9% compared with the first quarter of 2014, followed by guests from Asia (excluding Arab countries) with 26.5%. At the same time, the numbers of the GCC guests increased by 26.3%.

Table 4 : Guests of hotel establishments by nationality, first quarter of 2014 and 2015

Nationality	2014	2015	2015 Share (%)	Change (%)
UAE	260,755	319,409	31.9	22.5
GCC	58,698	74,135	7.4	26.3
Other Arab countries	91,912	92,321	9.2	0.4
Asia (excluding Arab countries)	170,675	215,895	21.6	26.5
Australia and Asia Pacific	10,926	12,212	1.2	11.8
Africa (excluding Arab countries)	12,387	13,896	1.4	12.2
Europe	172,852	198,608	19.8	14.9
North and South America	47,045	60,653	6.1	28.9
Not mentioned	9,521	13,980	1.4	46.8
Total	834,771	1,001,109	100.0	19.9

Source: Abu Dhabi Tourism and Culture Authority

More than two fifth of guests (40.1%) stayed in five stars hotels in the first quarter for 2015, followed by guests in four stars hotels with 27.7%, guests in three stars or less with 21.5% and guests in hotel apartments with 10.7%.

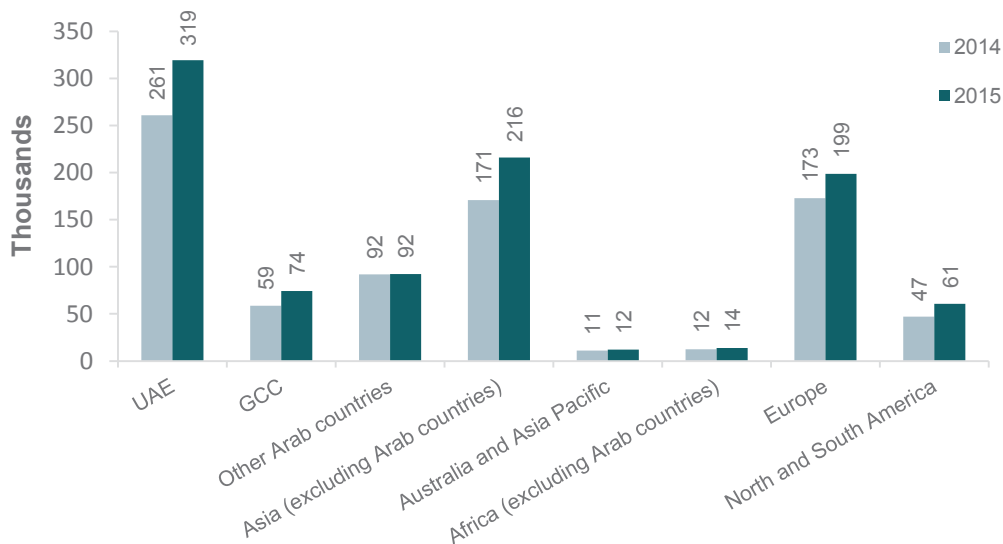
Table 5 : Hotel guests by nationality and classification, first quarter of 2015

Nationality	5 stars	4 stars	3 stars or less	Hotels Apartments	Total
UAE	146,748	74,304	63,246	35,111	319,409
GCC	26,180	20,161	15,690	12,104	74,135
Other Arab countries	19,363	29,884	27,681	15,393	92,321
Asia (excluding Arab countries)	77,612	58,935	56,737	22,611	215,895
Australia and Asia Pacific	4,567	3,550	3,005	1,090	12,212
Africa (excluding Arab countries)	3,566	5,632	3,348	1,350	13,896
Europe	94,289	59,851	32,491	11,977	198,608
North and South America	25,860	18,337	10,393	6,063	60,653
Not mentioned	3,713	6,239	3,054	974	13,980
Total	401,898	276,893	215,645	106,673	1,001,109

Source: Abu Dhabi Tourism and Culture Authority

A larger percentage of guests from UAE and Europe stayed in luxury hotels with around 46.0% and 47.5% respectively staying in five star hotels.

Figure 1 : Number of guests by nationality, first quarter of 2014 and 2015



Source: Statistics Centre- Abu Dhabi

Guest Nights

The number of guest nights increased by 11.3% to 2.9 million nights in the first quarter of 2015. Guest nights from the UAE contributed the largest share of the rise with 22.5%, followed by guests from GCC with 22.1%.

Table 6 : Guest nights by nationality, first quarter of 2014 and 2015

Nationality	2014	2015	2015% Share	Change %
UAE	603,120	739,036	25.7	22.5
GCC	131,416	160,424	5.6	22.1
Other Arab countries	244,361	249,133	8.7	2.0
Asia (excluding Arab countries)	539,980	570,431	19.9	5.6
Australia and Asia Pacific	40,179	42,113	1.4	4.8
Africa (excluding Arab countries)	40,293	46,977	1.6	16.6
Europe	748,526	786,942	27.4	5.1
North and South America	208,266	242,844	8.5	16.6
Not mentioned	24,622	35,337	1.2	43.5
Total	2,580,763	2,873,237	100.0	11.3

Source: Abu Dhabi Tourism and Culture Authority

Guests from Europe and the UAE represented more than half of the entire guest nights in the first quarter of 2015 with 27.4% and 25.7% respectively.

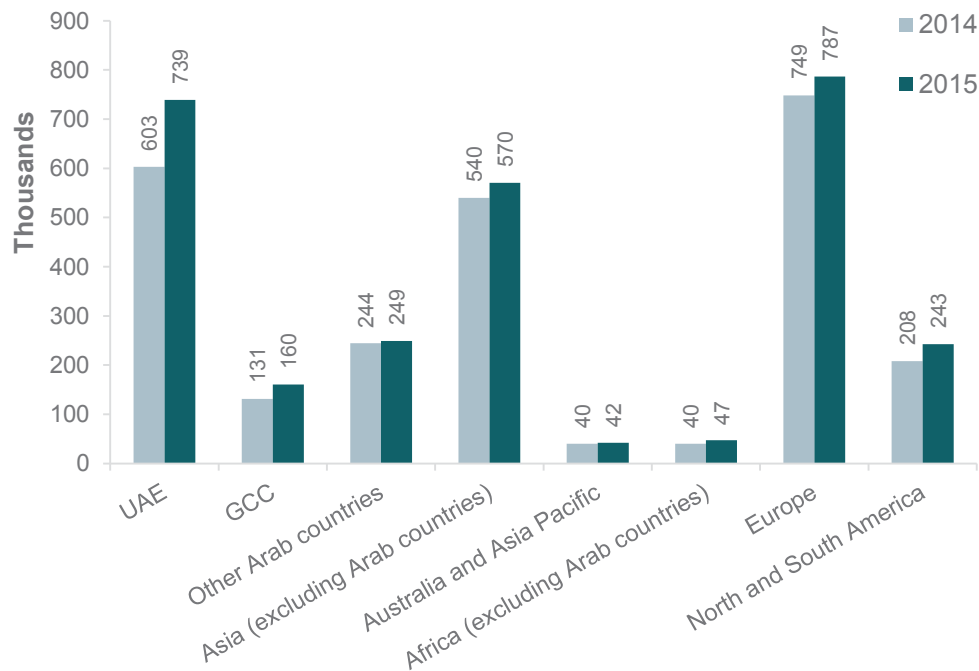
Guests from Australia and Asia Pacific contributed the lowest share of guest nights with 1.5%.

Table 7 : Guest nights by nationality and classification, first quarter of 2015 (Night/Guest)

Nationality	5 stars	4 stars	3 stars or less	Hotel apartments	Total
UAE	321,734	141,132	127,558	148,612	739,036
GCC	60,465	40,773	27,915	31,271	160,424
Other Arab countries	46,493	61,531	65,868	75,241	249,133
Asia (excluding Arab countries)	143,098	121,611	131,219	174,503	570,431
Australia and Asia Pacific	11,876	10,047	7,443	12,747	42,113
Africa (excluding Arab countries)	10,685	14,490	9,595	12,207	46,977
Europe	333,845	206,442	98,014	148,641	786,942
North and South America	77,740	56,652	26,262	82,190	242,844
Not mentioned	8,243	11,925	6,182	8,987	35,337
Total	1,014,179	664,603	500,056	694,399	2,873,237

Source: Abu Dhabi Tourism and Culture Authority

Figure 2 : Guest nights by nationality, first quarter of 2014 and 2015



Source: Statistics Centre- Abu Dhabi

Average Length of Stay

Compared with the first quarter of 2014, the average length of stay decreased by 7.1% in the first quarter of 2015 to 2.9 nights. Guests from Africa (excluding Arab countries) accounted for the largest percentage increase with 3.9%, followed by guests from Other Arab countries with 1.5%. Guests from Asia (excluding Arab countries) accounted for the largest percentage decrease with 16.5%, followed by guests from North and South America with 9.6%, and guests from Europe with 8.5%.

The highest average length of stay in the first quarter of 2015 was recorded by guests from North and South Americas with 4.00 nights, followed by European guests with 3.96 nights. The lowest average length of stay was recorded by GCC guests at 2.16 nights, followed by UAE guests at 2.31 nights.

Table 8 : Average length of stay by nationality, first quarter of 2014 and 2015

(Night/ Guest)

Nationality	2014	2015	Change %
UAE	2.31	2.31	0.03
GCC	2.24	2.16	-3.35
Other Arab countries	2.66	2.70	1.50
Asia (excluding Arab countries)	3.16	2.64	-16.45
Australia and Asia Pacific	3.68	3.45	-6.22
Africa (excluding Arab countries)	3.25	3.38	3.93
Europe	4.33	3.96	-8.50
North and South America	4.43	4.00	-9.56
Not specified	2.59	2.53	-2.26
Total	3.09	2.87	-7.11

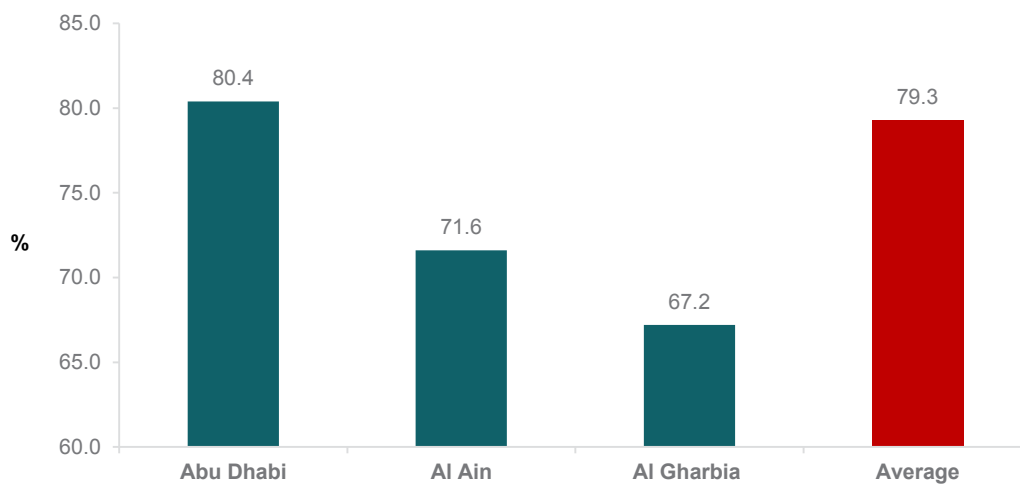
Source: Abu Dhabi Tourism and Culture Authority

Occupancy Rate

Occupancy rate is a significant hotel establishment indicator. The occupancy rate rose in the first quarter of 2015 by 0.3% compared with the same quarter in the previous year.

The occupancy rate in Abu Dhabi region (80.4%) was higher than in the Al Ain region (71.6%) and the Al Gharbia region (67.2%). Occupancy rates in hotel apartments (84.5%) was higher than in hotels (77.8%).

Figure 3 : Occupancy rate by region, first quarter of 2015



Source: Statistics Centre- Abu Dhabi

Revenues

The overall revenues of hotel establishments rose to AED 1.8 billion in the first quarter of 2015, an increase of 14.2% compared with the previous year.

Table 9 : Revenues of hotel establishments by type of revenue, first quarter of 2014 and 2015 (AED million)

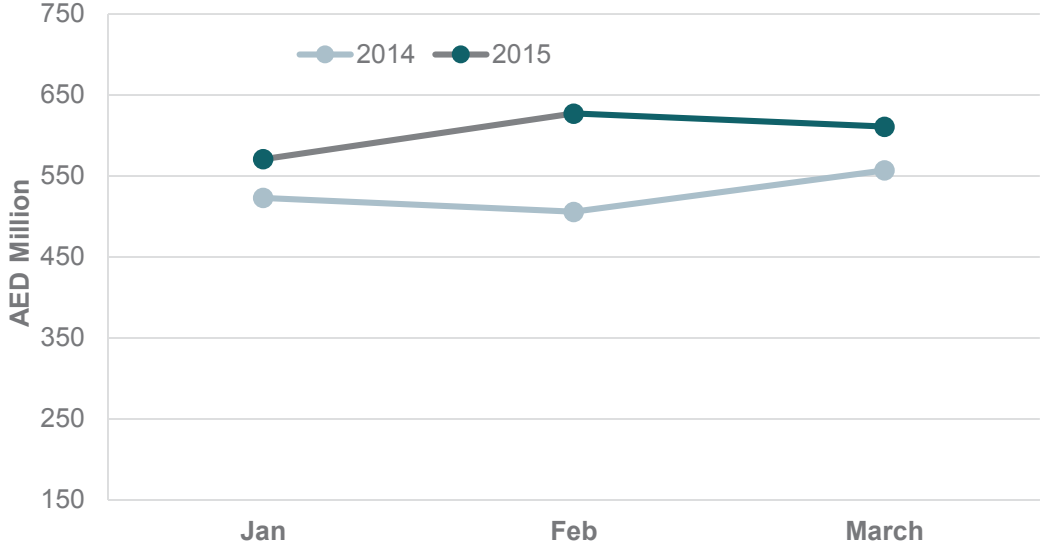
Revenue Type	2014	2015	Change %
Room	831.0	988.2	18.9
Food and beverages	595.4	618.3	3.8
Other revenues	158.7	205.0	29.1
Total revenues	1,585.1	1,811.5	14.2

Source: Abu Dhabi Tourism and Culture Authority

Compared with the first quarter of 2014, revenues of rooms in hotel establishments increased 18.9% during the first quarter of 2015; contributing 54.6% of the total hotel revenues in the first quarter of 2015, while other revenues increased by 29.2% over the same period, contributing 11.3% of the total hotel revenue.

The highest revenues were recorded in February 2015 with 34.7% of the annual total, followed by March with 33.8%.

Figure 4 : Revenues of hotel establishments by month, first quarter of 2014 and 2015



Source: Statistics Centre- Abu Dhabi

Explanatory Notes

Glossary

- Guest arrivals:** The number of registered guest arrivals (checked-in) including those who occupied complimentary or non-revenue generating rooms either for day-stay or overnight stay
- Guest nights:** The number of nights all guests spent in the hotel regardless of the type of rooms they occupy (single, double, twin, suite, etc)
- Room nights:** The number of nights a guestroom is occupied regardless of the number of persons occupying the room
- Total Hotel rooms:** The total hotel room inventory or hotel room capacity which include all rooms that are available for sale, out-of-order rooms, out-of-service rooms and those utilized for house use
- Number of rooms available:** Number of rooms available during the month covered by the report excluding out-of-order (a room status term indicating that a room is scheduled for maintenance, refurbishment, deep cleaning, etc.)
- Number of rooms occupied:** Number of rooms used daily including complimentary and house use.
- Room revenue** : The revenue generated by the hotel by the sold rooms including service charge and taxes.
- Food and beverage revenue:** The revenue generated by the Hotel from Restaurants, F&B room service and other activities related to food services including service charge and taxes.
- Other revenue:** Other services generated by the hotel that falls outside the room revenue and food & beverage revenue category including service charge and taxes.
- Total revenue:** The revenue generated by the hotel from all its operation including service charge and taxes.
- ARR/ADR:** A ratio that indicates average room rate and to what extent rooms are being up-sold or discounted; calculated by dividing room revenue by the number of rooms sold. Also called average daily rate or ADR. (Note: Should be based on paid rooms only) excluding complimentary and house use but including service charge.
- RevPAR:** A calculation used in the hotel industry that measures revenue per available room (total rooms in hotel minus out of service rooms)

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 (ADTA).

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 annually with the data after reviewing it.

Disclaimer

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