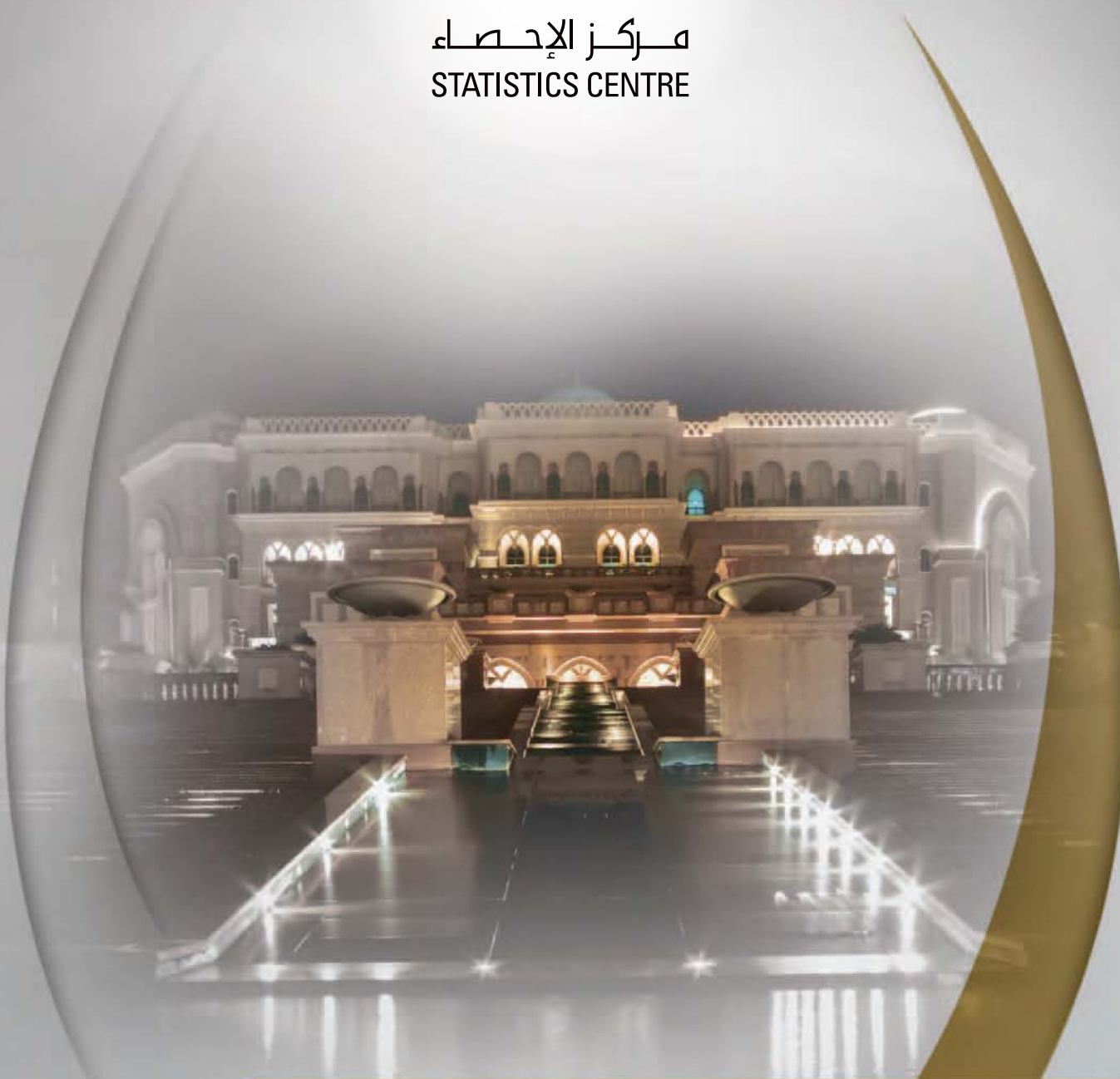




مركز الإحصاء
STATISTICS CENTRE



Hotel Establishments Statistics 2011-2012

April 2013

Table of Contents

Introduction	3
Key Points	4
Hotel Establishments	5
Number of Guests.....	7
Guest Nights.....	9
Average Length of Stay	10
Occupancy Rate	11
Revenues	12
Terms and Definitions	15
Technical Notes	15

List of Tables

Table 1: Key indicators of hotel establishments, 2011 – 2012.....	5
Table 2: Key indicators of hotel establishments by type, 2012	6
Table 3: Key indicators of hotel establishments by region, 2012	6
Table 4: Guests of hotel establishments by nationality, 2011 – 2012	7
Table 5: Hotel guests by nationality and classification, 2012.....	8
Table 6: Guest nights by nationality and classification, 2012.....	9
Table 7: Average length of stay by nationality, 2011 - 2012 (Night/ Guest)	11
Table 8: Revenues of hotel establishments by type of revenue, 2011 - 2012 (AED million)	12
Table 9: Percentage distribution of hotel establishments by month and type of revenue, 2012	13

List of Figures

Figure 1: Number of guests by month, 2011- 2012	8
Figure 2: Guest nights by nationality, 2011- 2012	10
Figure 3: Occupancy rate by month, 2011 - 2012	12
Figure 4: Revenues of hotel establishment by month, 2011 and 2012	14

Introduction

This publication presents statistics on hotel establishments in the Emirate of Abu Dhabi, 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. 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 in 2012 totaled 130 establishments, including 79 hotels.
- The number of guests totals 2.4 million, an increase of 13.1% between 2011 and 2012.
- The number of Emirati guests in 2012 accounted for 40.7%.
- The number of European guests contributed for 24.3% in 2012.
- More than 36.9% of guests stayed in five star hotels.
- Guest nights rose by 11.6% reaching 7 million nights in 2012.
- The total number of rooms in 2012 amounted to 22 thousand.
- The average length of stay in 2012 was 2.93 days.
- The highest occupancy rate in 2012 was recorded in February (75.9%) and October (71.4%).
- Hotel establishments' revenues in 2012 totaled AED 4.6 billion.

Hotel Establishments

The number of hotel establishments in 2012 rose to 130 establishments, a slight increase compared with 2011. The number of rooms rose to about 22 thousand in 2012, an increase of 3.5% compared with 2011.

Table 1: Key indicators of hotel establishments, 2011 – 2012

Indicator	2011	2012	Change %
Number of hotel establishments	129	130	0.8
Number of rooms	21,254	21,997	3.5
Number of guests (Thousand)	2,112	2,388	13.1
Number of nights (Thousand)	6,270	6,997	11.6
Average length of stay (Nights)	2.97	2.93	-1.3
Occupancy rate (per cent)	68.9	65.2	-5.4

Source: Abu Dhabi Tourism and Cultural Authority

The number of guests in 2012 totaled 2.4 million, an increase of 13.1% compared with 2011. The occupancy rate in 2012 was 65.2%, a decrease of 5.4%, while the number of guest nights increased by 11.6% compared with 2011.

The average length of stay in hotel apartments was two days longer compared with hotels, and the occupancy rate in hotel apartments was higher than hotels.

Table 2: Key indicators of hotel establishments by type, 2012

Indicator	Hotels	Hotel apartments	Total
Number of hotel establishments	81	49	130
Number of rooms	16,998	4,999	21,997
Number of guests (thousand)	1,981	407	2,388
Number of guest nights (thousand)	5,067	1,930	6,997
Average length of stay (nights)	2.56	4.74	2.93
Occupancy rate (%)	61.6	76.9	65.2
Average room revenues (AED)	491	353	453
Average revenues of available rooms (AED)	303	271	295

Source: Abu Dhabi Tourism and Cultural Authority

The majority of guests prefer to stay in the Abu Dhabi region at 84.3% of compared with 12.0% in the Al Ain region and 3.6% in the Al Gharbia region. The average length of stay in the Al Gharbia region was higher than Abu Dhabi and Al Ain regions.

Table 3: Key indicators of hotel establishments by region, 2012

Indicator	Abu Dhabi	Al Ain	Al Gharbia	Total
Number of hotel establishments	109	14	7	130
Number of rooms	19,609	1,682	706	21,997
Number of guests (thousand)	2,015	286	87	2,388
Number of guest nights (thousand)	6,154	571	272	6,997
Average length of stay (nights)	3.05	2.00	3.13	2.93
Occupancy rate (%)				65.2

Source: Abu Dhabi Tourism and Cultural Authority

Number of Guests

The total number of guests in 2012 grew to 2.4 million, an increase of 13.1% compared with 2011. Data illustrates that UAE Nationals formed the largest segment in hotel establishments, accounting for about 37.2% of the total guests, followed by European guests by 18.5%.

The number of guests increased for all nationalities, the largest increase was from Africa (Excluding Arab Countries) with 32.6% compared with 2011, followed by guests from Asia (Excluding Arab Countries) with 28%. Meanwhile, the lowest increase was for Australia and Asia Pacific guests with 4.1%, followed by North and South America with 6%.

Table 4: Guests of hotel establishments by nationality, 2011 – 2012

Nationality	2011	2012	2012 %	Change %
UAE	824,442	888,241	37.2	7.7
GCC	133,277	159,306	6.7	19.5
Other Arab countries	252,626	274,250	11.5	8.6
Asia (excluding Arab countries)	323,094	413,607	17.3	28.0
Australia and Asia Pacific	40,414	42,089	1.8	4.1
Africa (excluding Arab countries)	21,280	28,208	1.2	32.6
Europe	380,980	442,891	18.5	16.3
North and South America	109,327	115,857	4.9	6.0
Not mentioned	26,171	23,574	1.0	-9.9
Total	2,111,611	2,388,023	100.0	13.1

Source: Abu Dhabi Tourism and Cultural Authority

Guests in five stars hotels accounted for 36.9%, followed by guests in four stars hotels by 26.9%, guests in three stars or less by 19.2% and guests in hotel apartments by 17.1%.

Table 5: Hotel guests by nationality and classification, 2012

Nationality	Five stars	four stars	Three Stars or less	Hotels apartments	Total
UAE	358,016	198,820	167,722	163,683	888,241
GCC	57,910	36,716	32,898	31,782	159,306
Other Arab countries	60,115	84,020	71,221	58,894	274,250
Asia (excluding Arab countries)	102,569	120,654	107,406	82,978	413,607
Australia and Asia Pacific	19,707	13,965	4,447	3,970	42,089
Africa (excluding Arab countries)	7,620	10,464	6,230	3,894	28,208
Europe	213,847	135,799	53,077	40,168	442,891
North and South America	52,413	30,321	13,734	19,389	115,857
Not mentioned	8,445	10,891	1,582	2,656	23,574
Total	880,642	641,650	458,317	407,414	2,388,023

Source: Abu Dhabi Tourism and Cultural Authority

Guests from Europe preferred to stay in luxury hotels; 79.0% of them stayed in four and five stars hotels. With regard to guests from other Arab countries (i.e. excluding UAE and GCC), 21.9% of them stayed in five stars hotels and 26.0% in three stars hotels or less.

Figure 1: Number of guests by month, 2011- 2012

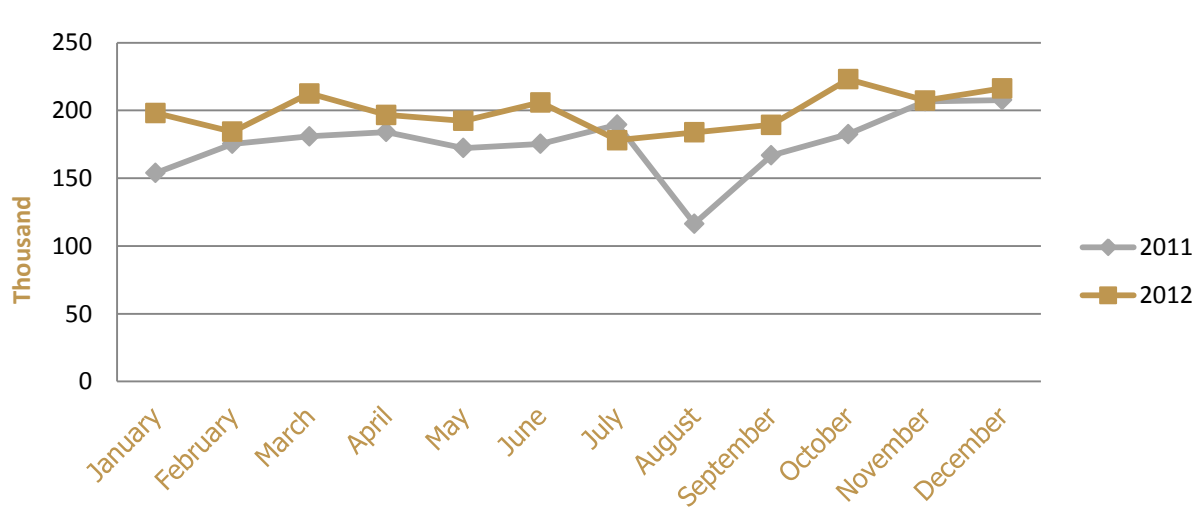


Figure (1) reflects the number of guests in hotel establishments during each month of 2012. The number of guests rose in October and March amounted to 223 thousand and 212 thousand guests respectively. Data shows that number of guests in August amounted to 184 thousand, an increase of 57.8% compared with the same month in 2011.

Guest Nights

The number of guest nights in 2012 totaled 7 million nights, an increase of 11.6% compared with 2011. Guest nights from Asia (excluding Arab countries) contributed the largest share of the rise with 26.5%, followed by guests from Africa (excluding Arab countries) with 25.6%, while guest nights of North and South American guests decreased by 6%.

Table 6: Guest nights by nationality and classification, 2012

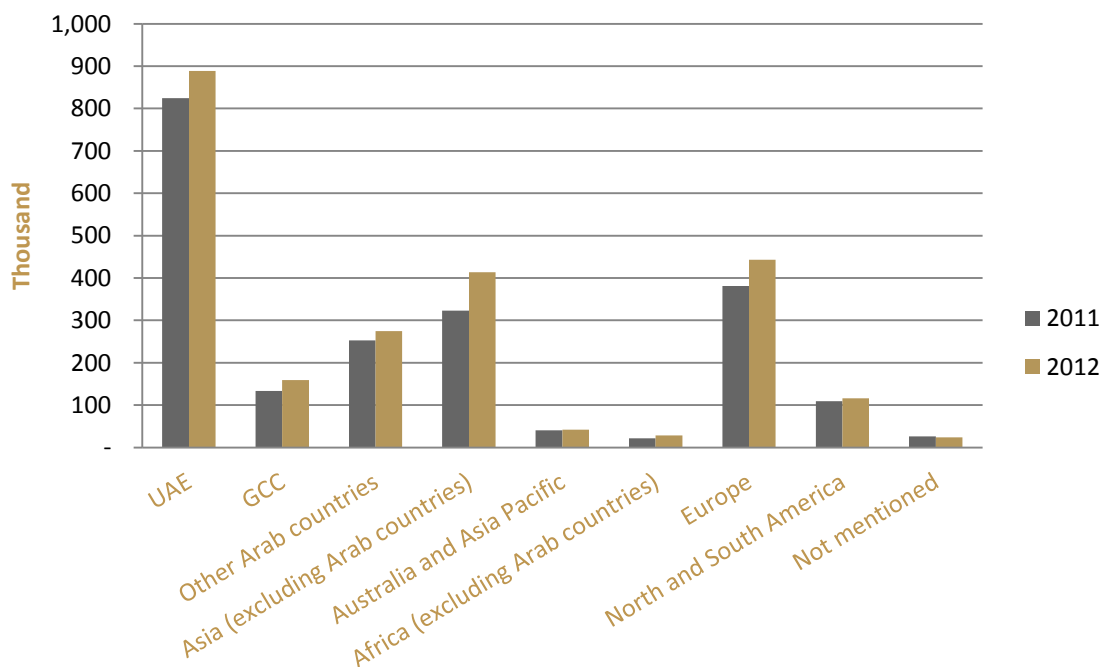
Nationality	2011	2012	2012%	Change %
UAE	1,573,266	1,701,393	24.3	8.1
GCC	301,105	353,981	5.1	17.6
Other Arab countries	652,585	693,374	9.9	6.3
Asia (excluding Arab countries)	1,060,502	1,341,974	19.2	26.5
Australia and Asia Pacific	143,403	141,966	2.0	-1.0
Africa (excluding Arab countries)	74,533	93,646	1.3	25.6
Europe	1,716,139	1,969,592	28.2	14.8
North and South America	653,879	614,692	8.8	-6.0
Not mentioned	94,270	86,106	1.2	-8.7
Total	6,269,682	6,996,724	100.0	11.6

Source: Abu Dhabi Tourism and Cultural Authority

Guest from Europe and the UAE represented more than half of the entire guest nights in 2012 with 28.2% and 24.3% respectively.

Guests from Africa (excluding Arab countries) contributed the lowest share of guest nights with 1.3%, followed by guests from Australia and Asia Pacific with 2.0%.

Figure 2: Guest nights by nationality, 2011- 2012



Average Length of Stay

The average length of stay decreased marginally in 2012 by 1.3%, with length at stay by all nationalities except the UAE declining. Guests from North and South America accounted for the highest decrease of 11.2 %, followed by guests from African countries (excluding Arab countries) and guests from Australia and Asia Pacific with 5.1% each.

The highest average length of stay in 2012 was recorded by guests from North and South Americas with 5.31 nights, followed by European guests with 4.5 nights. The lowest average length of stay was recorded by UAE guests at 1.92 nights, followed by GCC guests at 2.22 nights.

Table 7: Average length of stay by nationality, 2011 - 2012 (Night/ Guest)

Nationality	2011	2012	Change %
UAE	1.91	1.92	0.5
GCC	2.26	2.22	-1.8
Other Arab countries	2.58	2.53	-1.9
Asia (excluding Arab countries)	3.28	3.24	-1.2
Australia and Asia Pacific	3.55	3.37	-5.1
Africa (excluding Arab countries)	3.50	3.32	-5.1
Europe	4.50	4.45	-1.1
North and South America	5.98	5.31	-11.2
Not specified	3.60	3.65	1.4
Total	2.97	2.93	-1.3

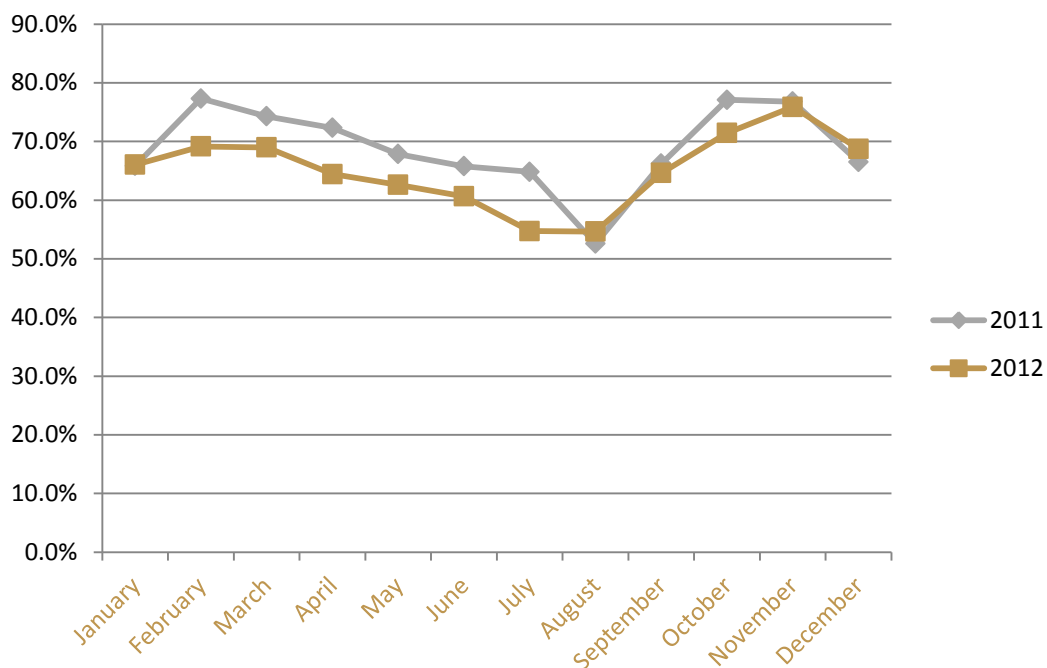
Source: Abu Dhabi Tourism and Cultural Authority

Occupancy Rate

Occupancy rate is a significant hotel establishment indicator. The occupancy rate in 2012 was 65.2%, a decline of 5.4% compared with 2011 despite the rise in the number of guests.

Figure (3) shows that occupancy rate rose in February and March reaching 69% before it declined to 55% in July and August. It rose again in November to record its highest level at 76% and then decreased in December to 69%.

Figure 3: Occupancy rate by month, 2011 - 2012



Revenues

The overall revenues of hotel establishments in 2012 totaled AED 4.6 billion, an increase of 5.8% compared with 2011.

Table 8: Revenues of hotel establishments by type of revenue, 2011 - 2012 (AED million)

Revenue Type	2011	2012	Change %
Room	2,315	2,343	1.1
Food and Beverages	1,604	1,803	12.4
Other Revenues	457	487	6.6
Total Revenues	4,376	4,633	5.9

Source: Abu Dhabi Tourism and Cultural Authority

Revenues of food and beverages in hotel establishments by 12.4% in 2012, contributing 38.9% of the total hotel revenues, while revenues of rooms increased in the same year by 1.1% contributed 50% of the total hotel revenues.

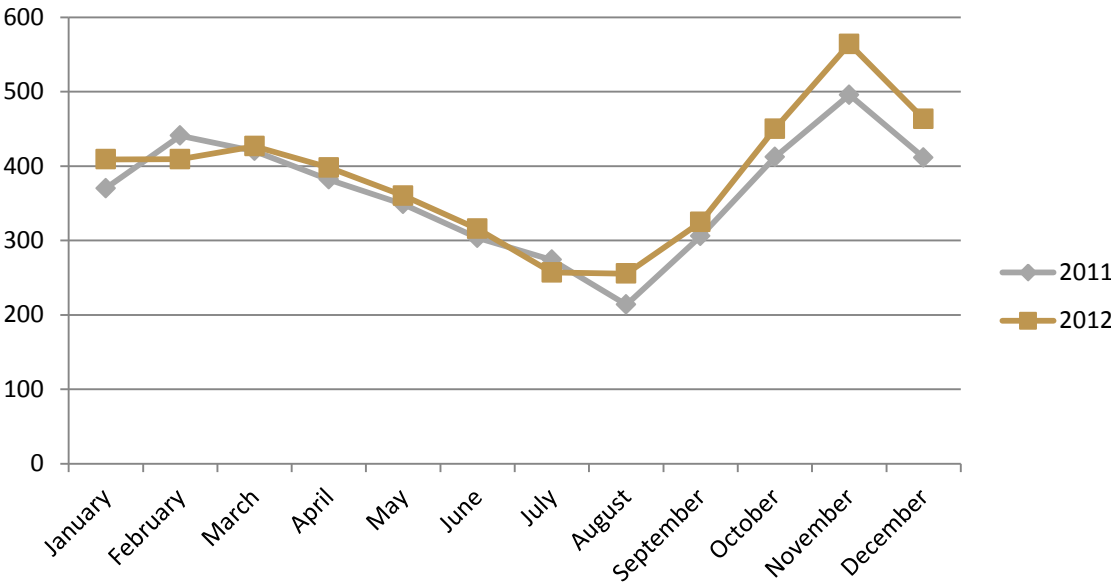
Table 9: Percentage distribution of hotel establishments by month and type of revenue, 2012

Month	Room	Food & Beverage	Others	Total
January	9.2	8.6	8.0	8.8
February	9.2	8.7	7.7	8.8
March	9.2	9.2	9.3	9.2
April	8.4	8.8	8.6	8.6
May	7.1	8.4	8.5	7.8
June	6.2	7.3	7.7	6.8
July	5.4	5.4	6.6	5.5
August	5.4	5.5	6.2	5.5
September	6.8	7.0	8.2	7.0
October	10.0	9.4	9.6	9.7
November	13.6	10.9	10.1	12.2
December	9.6	10.6	9.4	10.0
Total	100.0	100.0	100.0	100.0

Source: Abu Dhabi Tourism and Cultural Authority

Data revealed that the highest revenues in 2012 were recorded in November at 12.2%, followed by December at 10%, while the lowest revenues were generated in July and August at 5.5% each.

Figure 4: Revenues of hotel establishment by month, 2011 and 2012



Terms and Definitions

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.

