



مركز الإحصاء - أبوظبي
STATISTICS CENTRE - ABU DHABI



Hotel Establishments

(Abu Dhabi Emirate) 2009-2010

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2009-2010

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Foreword

Due to the pressing need in recent years to diversify the non-oil economy, there has been an increasing interest in tourism. Moreover, the tourism movement in the Emirate of Abu Dhabi has recently experienced a boom triggered by a massive influx of people of diverse races, nationalities and social backgrounds. The variety of international, national and local events, like sports, cultural and Islamic activities, that are continuously organized in the Emirate has also contributed significantly to the rise in the tourism movement in Abu Dhabi. Evidently, the emirate receives higher numbers of tourists in winter, which extends between the months of November and March, because of visiting relatives coming from everywhere to see the UAE touristic landmarks as well as participants coming to attend conferences, courses and forums and other various activities.

Tourism, as a dynamic and promising sector, has been placed on top of Abu Dhabi government's agenda to diversify both the economy and the sources of income. It is regarded as a priority sector that is expected to play a substantial role in "Abu Dhabi 2030" and act as the driving-force for the strategic progress and development of the Emirate.

Hotel establishments and high quality hospitality services are considered an integral part of touristic attraction in the Emirate of Abu Dhabi which adopts the most up-to-date hotel standards believing them to be basic factors in the progress of tourism.

Given the importance of this sector, this report sheds light on the key indicators for tourism for the previous two years 2009 and 2010, such as the number of hotel establishments and rooms, the number of guests and their nationalities, the number of guest nights and the average length of stay, in addition to monthly and annual occupancy rates.



Butti Ahmed Mohamed Bin Butti Al Qubaisi
Director General

Hotel Establishments

Hotel Establishments refer to the hotels and hotel apartments operating in the Emirate of Abu Dhabi and subject to the supervision of Abu Dhabi Tourism Authority. In recent years, the data has clearly indicated the continued increase in the number of hotel establishments, with their total number rising to 116 establishments in 2010, marking an increase of about 5.5% compared with the year 2009. This rise was accompanied by an evident increase in the number of hotel rooms, which grew by 1,740 rooms in 2010 to 18.8 thousand rooms.

The number of guests in 2010 was about 1,812 thousand guests, up 17.7% over the previous year. Since the rise in the number of hotel establishments and hotel rooms was greater than the rise in the number of guests, the annual occupancy rate dropped from 72.2% in 2009 to 64.7% in 2010.

Table (1) Key Indicators for Hotel Establishments, 2009-2010

Indicators	2009	2010	(%) Change
Number of Hotel Establishments	110	116	5.45
Number of Rooms	17,104	18,844	10.17
Number of Guests (Thousand)	1,540	1,812	17.66
Number of Guest Nights (Thousand)	4,319	5,132	18.82
Average Length of Stay (Night)	2.80	2.83	1.07
Occupancy Rate (%)	72.2	64.68	-10.42

Source: Abu Dhabi Tourism Authority

Guest Nights are defined as the total number of nights spent by all guests during a specific period of time. In 2010, the average length of stay has increased by about 19% over the previous year. The average length of stay refers to the total number of guest nights divided by the total number of guests during the study period. The average length of stay has increased by only 0.03 night.

Table (2) shows the key indicators for hotel establishments by type in 2010. The data shows that the number of rooms in hotels is 1.5 times the number of rooms in hotel apartments. The results also indicate that the average length of stay in hotel apartments is more than two nights longer than that in hotels. Moreover, the occupancy rate of hotel apartments is higher than hotels i.e. guests prefer hotel apartments to hotels and this can be due to the fact that the average prices per room in hotel apartments are less than those of hotels rooms.

Table (2) Key Indicators for Hotel Establishments by Establishment Type (hotels-hotel apartments) -2010

Indicators	Hotels	Hotel Apartments	Total
Number of Hotel Establishments	65	51	116
Number of Rooms	13,495	5,349	18,844
Number of Guests (Thousand)	1,454	358	1,812
Number of Guest Nights (Thousand)	3,496	1,636	5,132
Number of Room Nights (Thousands)	2,656	1,286	3,943
Average Length of Stay (Night)	2.40	4.57	2.83
Annual Occupancy Rate (%)	60.71	74.90	64.68
Average Room Revenue (AED)	624.58	447.47	567.27
Average Revenue per Available Room (AED)	379.19	335.15	366.88

Source: Abu Dhabi Tourism Authority

The data in table (3) shows that the largest proportion of guests (81.4%) stayed in Abu Dhabi region, compared to 14.5% in Al Ain and 4.1% in the Western Region. It is also evident that the average length of stay is longer in Abu Dhabi (3.04 nights) compared to 1.79 nights in Al Ain and 2.76 nights in the Western Region.

Table (3) Key Indicators for Hotel Establishments by Region (Abu Dhabi, Al Ain, Western Region)-2010

Indicators	Abu Dhabi	Al Ain	Western Region	Total
Number of Guests (Thousand)	1,474	263	74	1,812
Number of Guest Nights (Thousand)	4,458	470	204	5,132
Number of Room Nights (Thousands)	3,461	338	144	3,943
Average Length of Stay (Night)	3.04	1.79	2.76	2.83
Average Occupancy Rate (%)	65.45	60.85	56.06	64.68
Average Room Revenue (AED)	569.71	496.11	674.44	567.27
Average Revenue per Available Room (AED)	372.85	301.88	378.06	366.88

Source: Abu Dhabi Tourism Authority

Numbers of Guests

The total number of guests amounted to 1.812 thousands in 2010, with an increase of 17.6% compared with 2009.

The data also indicates that Emirati nationals constituted the majority of guests, making up 41.5% of the total guests, followed by guests from Europe with a percentage of 17.5%. The fewest numbers of guests were from Africa, excluding Arab countries, with less than 1% of the total number of guests for 2010, followed by guests from Australia and the Pacific, who accounted for 1.7% of total guests during 2010.

Table (4) Guests by Nationality (2009-2010)

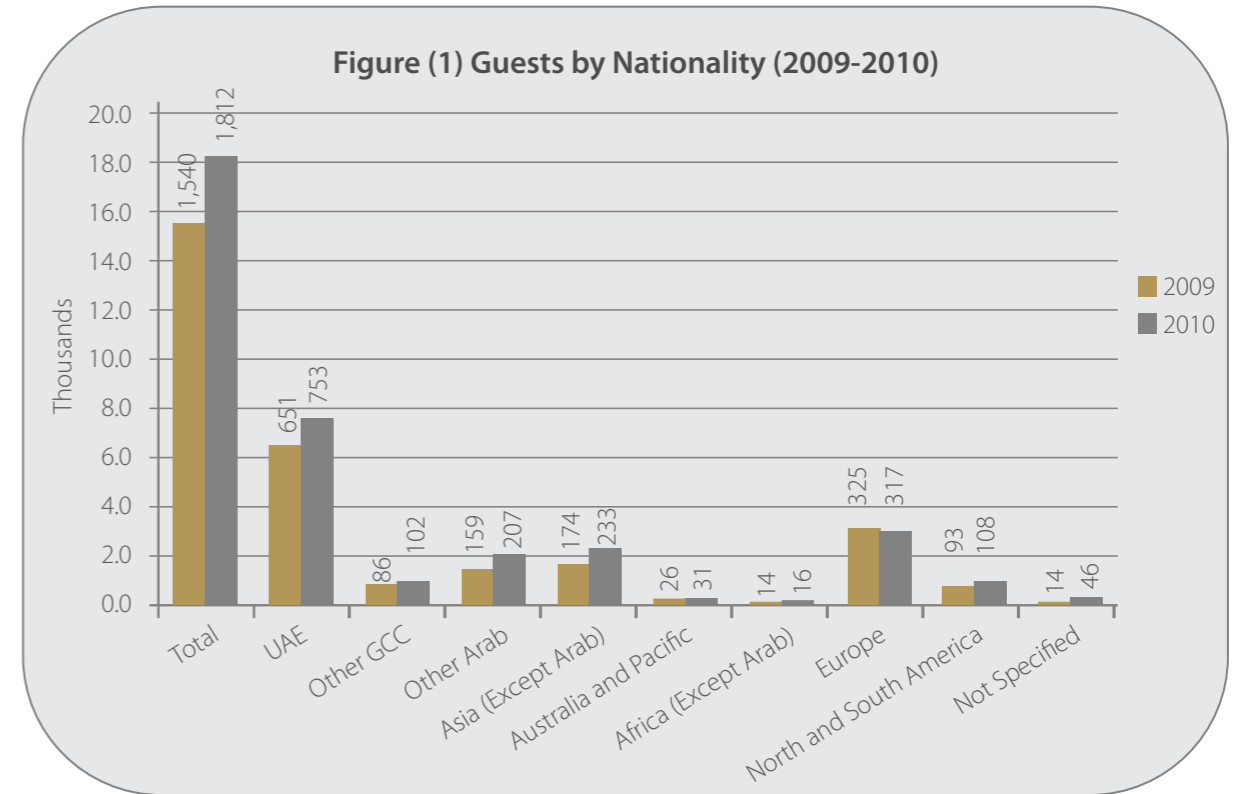
Nationality	2009	2010	(%) Change
Total	1,540,258	1,812,011	17.6
UAE	650,585	752,777	13.6
Other GCC	85,670	102,067	16.1
Other Arab	158,797	206,830	23.2
Asia (Except Arab)	173,921	232,827	25.3
Australia and Pacific	26,013	30,712	15.3
Africa (Except Arab)	13,569	16,091	15.7
Europe	325,392	316,701	-2.7
North and South America	92,696	108,303	14.4
Not Specified	13,615	45,703	70.2

Source: Abu Dhabi Tourism Authority

The data shows that the number of guests by nationality has generally increased for all nationalities except for European nationalities, which slightly decreased by less than 3%. As for the other nationalities, the percentage of guests has reached 25% for Asian guests, excluding Arab, and 23% for the other Arab nationalities, whereas the lowest percentage was of Emirati nationals with 13.6% and guests from North and South America with 14.4%. Figure (1) compares the number of guests in 2009 and 2010.

With regard to the number of guests by hotel classification, the results revealed that more than one third of guests (34.3%) prefer to stay in five-star hotels, followed by guests who prefer three-star or less hotels, who accounted for 25.2% of total guests, and then the guests of four-star hotels (20.7 %) and finally the guests of hotel apartments (19.8%).

Figure (1) Guests by Nationality (2009-2010)



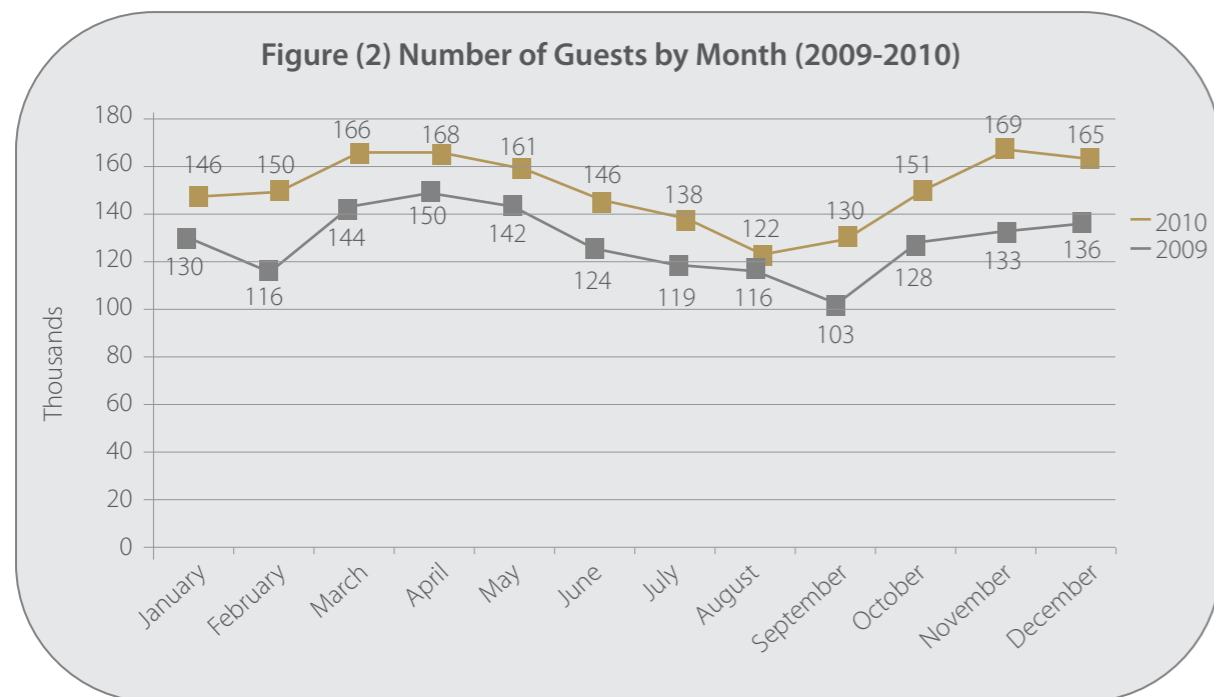
Detailed according to the distribution of guests by hotel classification and nationality, the data indicates that 44.8% of guests from North and South America prefer to stay in five-star hotels, whereas 55.2% stayed in four-star hotels or less. Guests from European countries followed with a percentage of 42.8% residing in five-star hotels compared to 57.2% staying in four-star hotels or less. While guests from Asian countries, excluding Arab, and guests from Arab countries prefer to stay in three-star hotels and less with percentages of 36.6% and 35.5% respectively.

Table (5) Guests by Nationality and Classification 2010 (Thousand)

Nationality	Five Stars	Four Stars	Three Stars and Less	Hotel Apartments	Total
Total	622.4	375.7	456.1	357.9	1,812.0
UAE	291.0	145.0	178.0	138.9	752.8
Other GCC	35.9	15.4	26.8	24.0	102.1
Other Arab	38.3	32.5	73.3	62.8	206.8
Asia (Except Arab)	48.7	35.9	85.3	63.0	232.8
Australia and Pacific	11.6	8.9	5.7	4.5	30.7
Africa (Except Arab)	4.7	3.6	4.4	3.4	16.1
Europe	135.4	86.2	58.4	36.7	316.7
North and South America	48.5	25.5	16.8	17.5	108.3
Not Specified	8.3	22.9	7.4	7.2	45.7

Source: Abu Dhabi Tourism Authority

The data in Figure (2) indicates that the number of guests increases in winter between the months of February and May as well as at the beginning of the year and in November by the end of the year, when the climate is moderate and multiple events take place in the Emirate of Abu Dhabi. The Figure also shows that the numbers of guests decrease in summer, starting from the beginning of June till they reach their lowest level in August, when the temperature in the emirate is often extremely high.



Guest Nights

Guest nights are determined by the number of guests and the length of their stay. Guest nights are defined as the number of guests multiplied by the length of stay. Therefore, it is quite natural if all guests spent the same duration of time in hotels that the distribution of guest nights would follow the same pattern of the number of guests. The data shows that the number of guest nights has risen by 18.8%, amounting to 5,132 thousand guest nights in 2010.

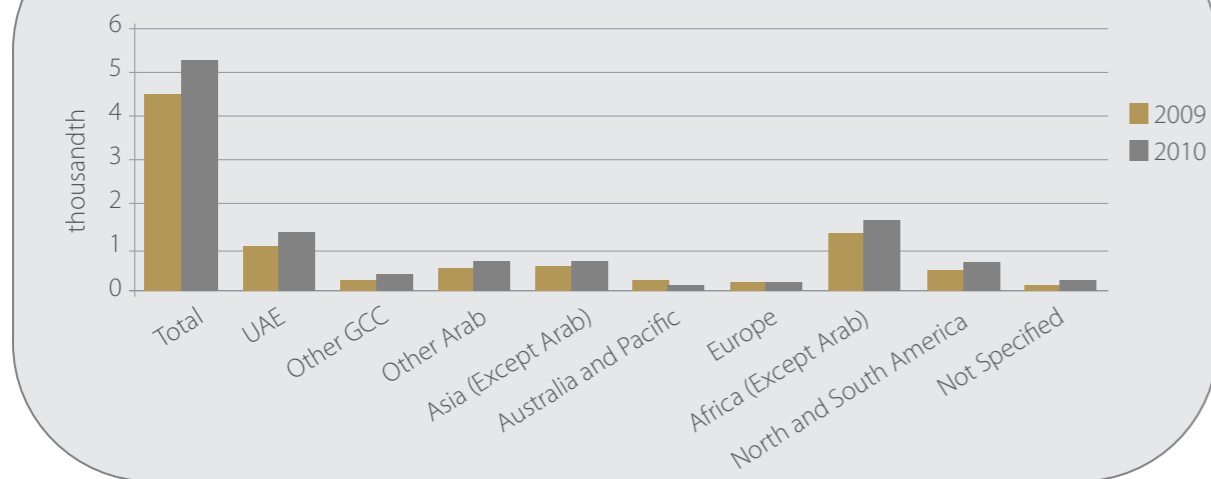
Table (6) Guest Nights in Hotel Establishments by Nationality (2009-2010)

Nationality	2009	2010	(%) Change
Total	4,318,504	5,132,323	18.8
UAE	1,117,628	1,348,270	20.6
Other GCC	163,247	200,223	22.7
Other Arab	446,668	543,326	21.6
Asia (Except Arab)	654,807	767,165	17.2
Australia and Pacific	119,484	107,486	-10.0
Africa (Except Arab)	53,233	63,974	20.2
Europe	1,272,993	1,373,467	7.9
North and South America	444,646	587,711	32.2
Not Specified	45,798	140,701	207.2

Source: Abu Dhabi Tourism Authority

The Data in table (6) indicates that European guests came first in terms of guest nights with a percentage of 26.8%, followed closely by Emiratis with 26.3%, i.e. those two categories have accounted for more than half of the total guest nights for all nationalities. In Contrast, the percentage of guest nights for the African nationalities, excluding Arab, was only 1.2%.

The number of guest nights has increased for all nationalities except for Nationalities from Australia and the Pacific which decreased by 10.0%, while the increase in the number of guest nights for all other nationalities and have varied between 32.2% for other north and south America and 7.9% for European nationalities.

Figure (3) Guest Nights by Nationality (2009-2010)

Average Length of Stay

The average length of stay is defined as the ratio of dividing the number of guest nights by the number of guests. The data shows an extremely low increase in the total average in 2010.

A review of the data on the average length of stay by nationality reveals a drop in the average length of stay for the categories of other Arab countries as well as Asia, excluding Arab, and Australia and the Pacific. The drop ranged from 0.18 night to 1.09 nights, while the average length of stay for all other nationalities has shown a tiny increase of 0.06 night.

Table (7) Average of Guest Nights in Hotel Establishments by Nationality (2009-2010)

Nationality	2009	2010	Difference	(%) Change
Total	2.80	2.83	0.03	1.1
UAE	1.72	1.79	0.07	4.1
Other GCC	1.91	1.96	0.05	2.6
Other Arab	2.81	2.63	-0.18	-6.4
Asia (Except Arab)	3.76	3.30	-0.46	-12.2
Australia and Pacific	4.59	3.50	-1.09	-23.7
Africa (Except Arab)	3.92	3.98	0.06	1.5
Europe	3.91	4.34	0.43	11.0
North and South America	4.80	5.43	0.63	13.1
Not Specified	3.36	3.08	-0.28	-8.3

Source: Abu Dhabi Tourism Authority

Occupancy Rate

Specialists believe that the occupancy rate is one of the important key indicators of the economic performance of hotel establishments. Occupancy rate is defined as the number of guest nights divided by the number of available rooms in the reference period (night-month –year). Available data shows that the occupancy rate has decreased by 10.4% in 2010 compared with 2009.

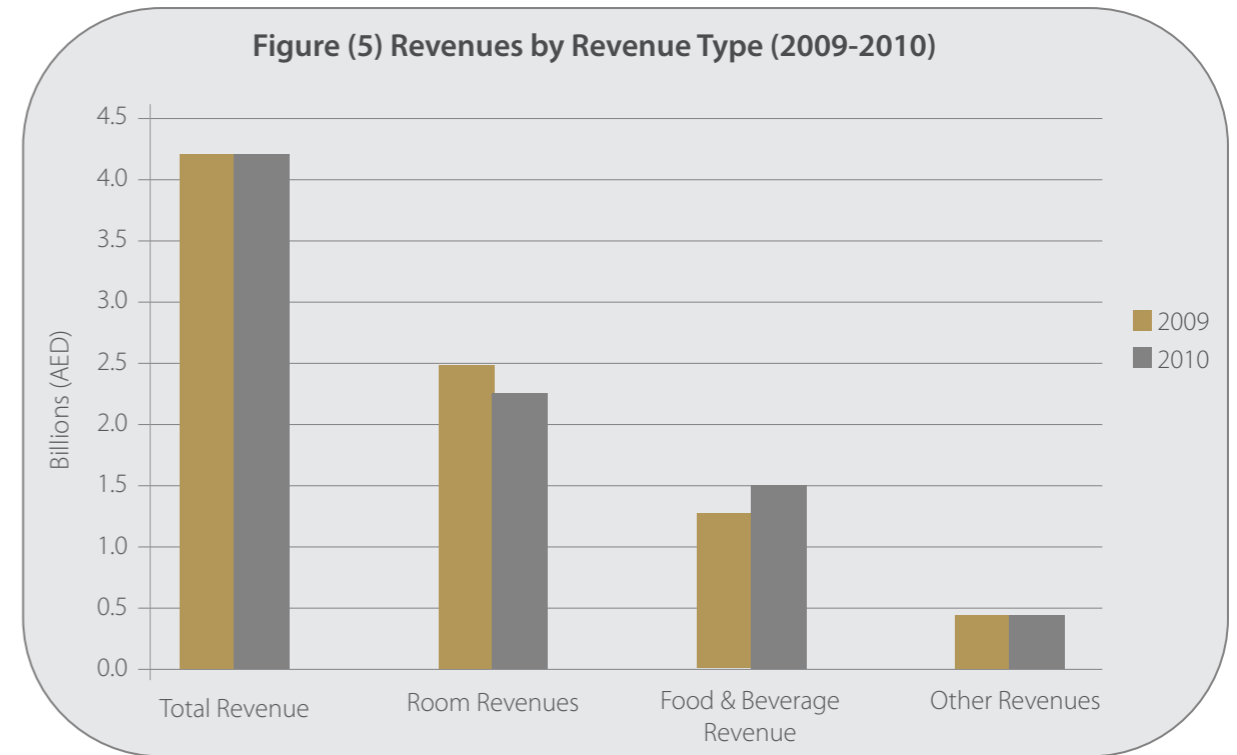
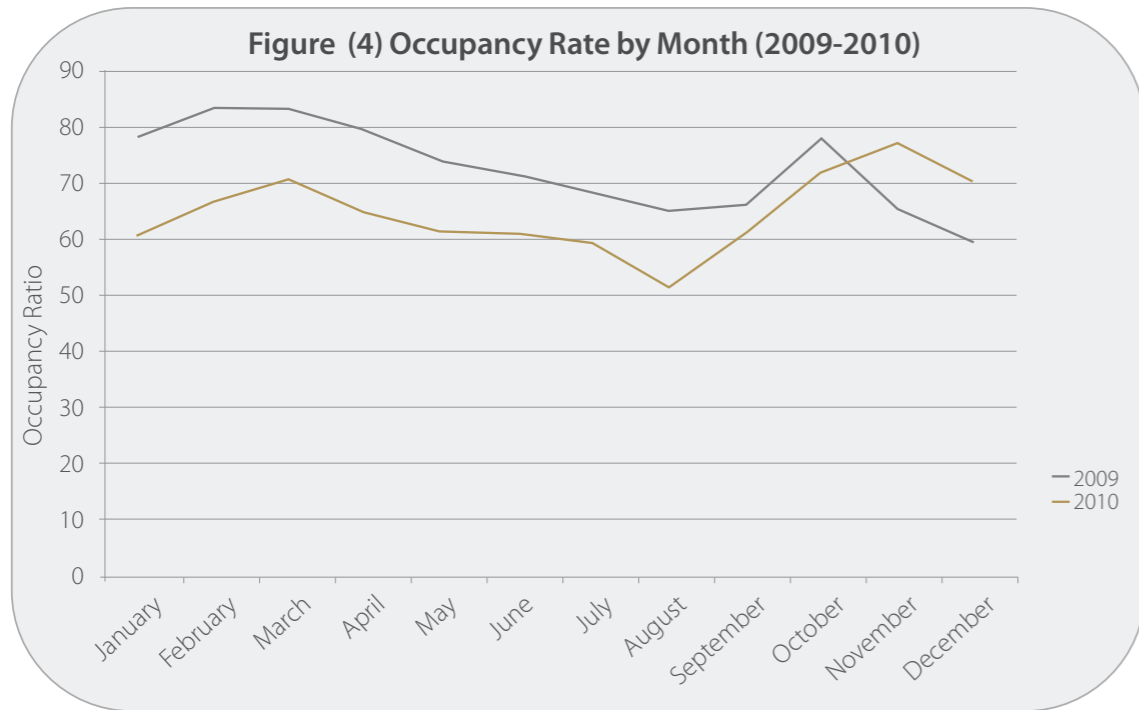
Table (8) Occupancy Rate in Hotel Establishments by Month (2009-2010)

Month	2009	2010	(%) Change
Average	72.17	64.68	-10.4
January	78.26	60.50	-22.7
February	83.35	66.59	-20.1
March	83.50	70.52	-15.5
April	79.35	64.62	-18.6
May	73.92	61.24	-17.2
June	71.34	61.06	-14.4
July	68.43	59.22	-13.5
August	64.96	51.42	-20.8
September	66.13	61.02	-7.7
October	78.09	72.02	-7.8
November	65.25	77.15	18.2
December	59.71	70.20	17.6

Source: Abu Dhabi Tourism Authority

Table (8), which demonstrates the pattern of occupancy rates during the months of 2010, indicates that occupancy rates rise in the winter months and decrease in summer months. The highest occupancy rate (77.2%) was reported in November, followed by October, during which the occupancy rate stood at 72.0%. The occupancy rate falls to its lowest levels in summer months, especially in August (51.4%) which could be due to the rise in summer temperatures and the moderate winter weather, in addition to the greater number of cultural and other events that take place in the winter months.

On the other hand, the occupancy rate has fallen in all the months of the year except for the months of November and December (18.2% and 17.6% respectively) and this is due to the mild temperature of the Emirate of Abu Dhabi during those two months as well as the growing number of cultural and sporting events held in the Emirate.



Revenues

The total revenues of hotel establishments are directly proportional to the number of guests and the average length of stay. However, the relevant data shows a marginal drop in the total revenues of hotel establishments for 2010 compared with the previous year.

Table (9) Revenues of Hotel Establishments by Revenue Type (2009-2010)

Thousand (AED)

Revenue Type	2009	2010	(%) Change
Total Revenue	4,240,629	4,228,399	-0.29
Room Revenue	2,472,846	2,268,913	-8.25
Food & Beverage Revenue	1,298,560	1,507,387	16.08
Other Revenues	469,223	452,099	-3.65

Source: Abu Dhabi Tourism Authority

Table (9) displays the revenues of hotel establishments by type and shows a decline in the total revenues between the two years of the study despite the rise in the number of guests. This may be due to the low competitive prices offered as a result of the increase in the number of hotel establishments and the consequent rise in the number of rooms.

As shown in table (9), the revenue of food and beverage in hotel establishment has risen by about 16% and the reason could be due to receiving external customers who are not guests as these hotels provide services for all customers whether they are guests or non-guests of the hotel establishments.

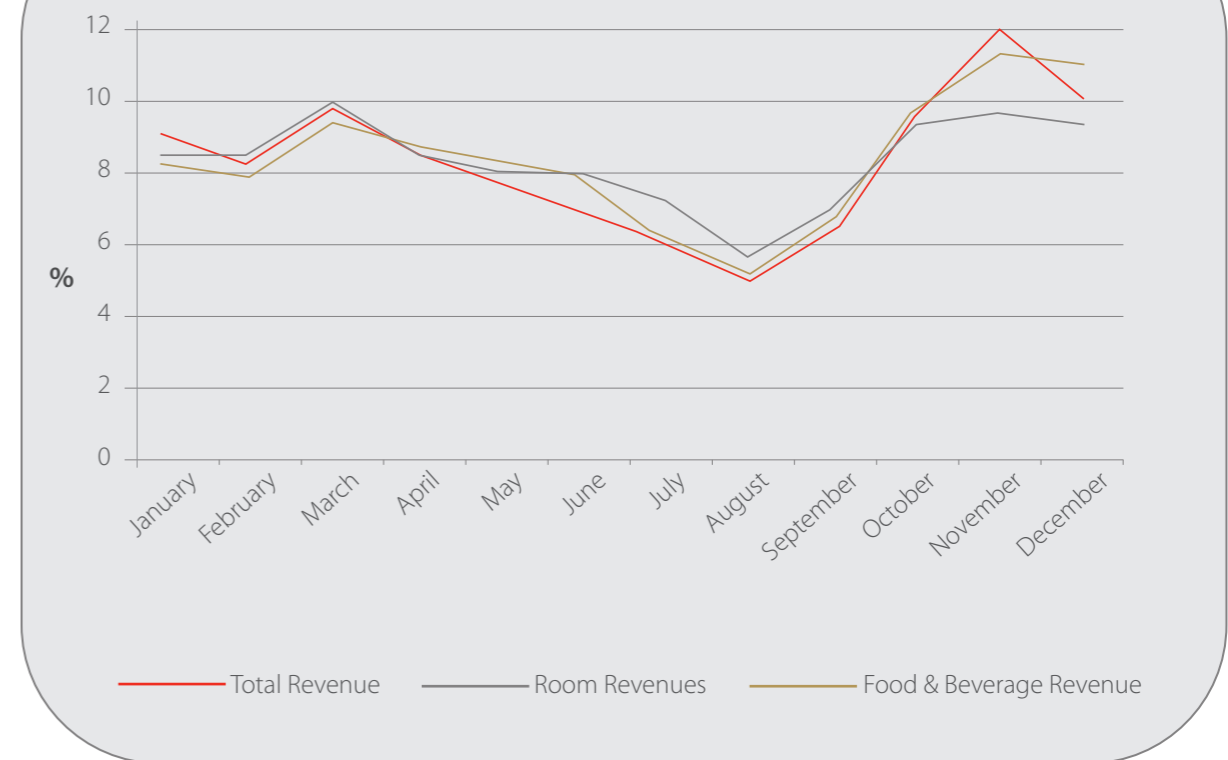
Table (10) Percentage Distribution of Hotel Establishments Revenues by Month and Revenue Type- 2010

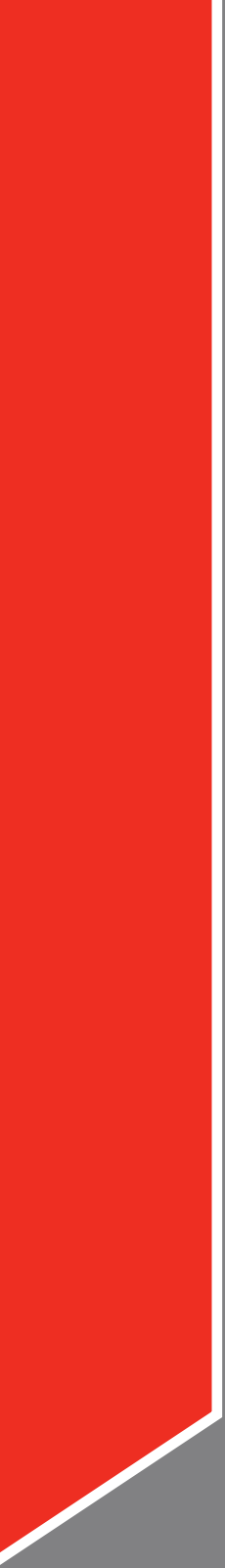
Month	Total Revenues	Room Revenue	Food and Beverage Revenue	Other Revenues
Total	100.0	100.0	100.0	100.0
January	9.1	8.7	8.3	9.6
February	8.4	8.5	7.9	8.7
March	9.8	9.8	9.5	10.0
April	8.6	8.7	8.7	8.5
May	7.8	8.1	8.3	7.5
June	7.0	7.9	7.8	6.4
July	6.1	7.2	6.0	5.9
August	5.0	5.7	5.0	5.0
September	6.5	7.0	6.7	6.3
October	9.5	9.3	9.6	9.5
November	12.0	9.7	11.4	13.0
December	10.2	9.4	11.0	9.8

Source: Abu Dhabi Tourism Authority

The data in table (10) shows that the distribution of revenues is similar to the distribution of guests in Figure (2), with the highest percentage of revenues received in November, followed by December, and the lowest revenue was in August when the number of guests fell considerably compared with other months.

Figure (6) Percentage Distribution of Hotel Establishments Revenues by Month and Revenue Type-2010





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