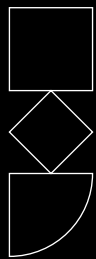دائرة الثقافة والسياحة
DEPARTMENT OF CULTURE
AND TOURISM

2024
Hotel Performance Report

OVERALL PERFORMANCE

In 2024, Abu Dhabi's tourism sector thrived, welcoming 5.8 million hotel guests (including 3 million international guests) to achieve 79% hotel occupancy, with notable growth from international markets including China, India, and the UK.
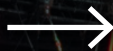
HOTEL GUESTS
5.8M → ↑ **+6%**

OCCUPANCY
79% → ↑ **+9%**

ADR
₧ 497 → ↑ **+12%**

INTERNATIONAL HOTEL GUESTS

3M → ↑ **+27%**

ALOS
3.2 NIGHTS

KEY INTERNATIONAL MARKETS

Visitor numbers (YoY)

CHINA	+78%	268K
UK	+46%	219K
INDIA	+43%	358K
SAUDI ARABIA	+32%	177K
RUSSIA	+30%	207K
USA	+30%	116K
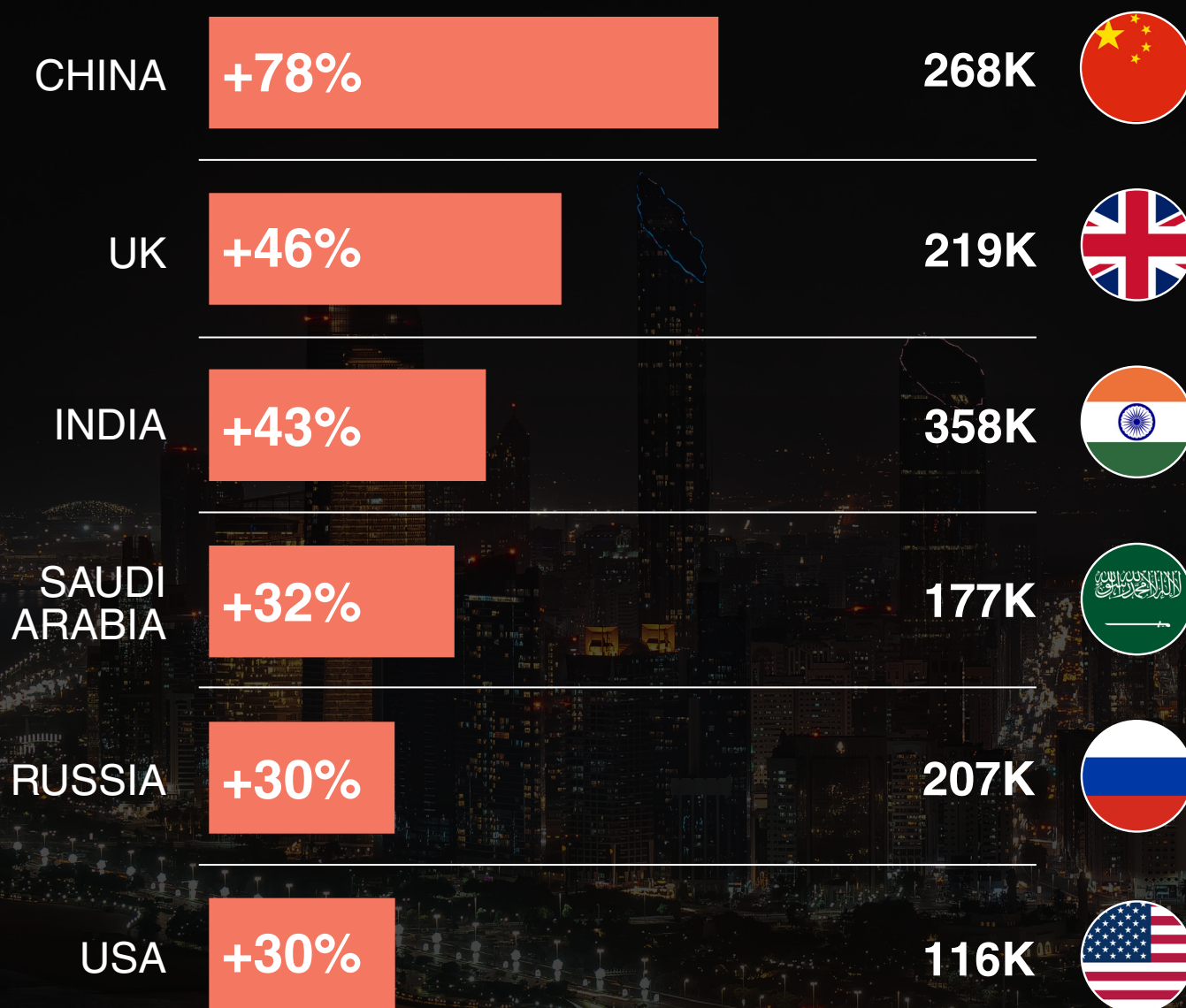
PERFORMANCE BY REGION

Each of the emirate's **three regions** contributed to the success of Abu Dhabi's tourism sector.

ABU DHABI CITY

AL AIN REGION

AL DHAFRA REGION

+18.5%

+9.9%

+16.6%

INCREASE IN REVENUE

INCREASE IN REVENUE

INCREASE IN REVENUE

Regional Performance Insights

Abu Dhabi City remained a key driver of tourism growth, with a **6.1% increase** throughout 2024 in guest arrivals and an **18.5% increase** in total revenues.

Al Ain Region also contributed positively, experiencing growth in both **guest arrivals (3.6%)** and **revenues (9.9%).**

Al Dhafra Region's hotels achieved remarkable success by implementing strategic rate adjustments that encouraged longer stays and boosted occupancy. These efforts led to a **27% increase** in average length of stay (ALOS) and a **35% rise** in occupancy, ultimately driving a substantial **16.6% growth** in total revenues compared to 2023.

CURRENT HOTEL SUPPLY
(AS OF DEC 2024)

171
HOTELS

34.2K
ROOMS

ABU DHABI
138 HOTELS
30.1K ROOMS

AL AIN
19 HOTELS
2.5K ROOMS

AL DHAFRA
14 HOTELS
1.7K ROOMS

5 STARS
58 HOTELS
16.3K ROOMS

4 STARS
40 HOTELS
8.1K ROOMS

3-1 STARS
29 HOTELS
4K ROOMS

APARTMENTS
44 HOTELS
5.9K ROOMS

SUPPLY ADDITIONS IN 2024

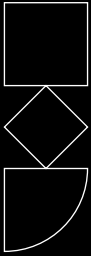| MONTH	HOTEL NAME	RATING	ROOMS
Feb 2024	Santorini Retreat	5-Star	22
June 2024	La Quinta	4-Star	107
Oct 2024	Beach Bay Al Mirfa	Deluxe	76
Oct 2024	Arabian Palace	3-Star	50
Nov 2024	Capital Suites Apartments	Deluxe	323
Total			**578**

A Year of Growth

Abu Dhabi's hotel sector closed 2024 with significant annual growth across all key performance indicators, including guest numbers, occupancy and average room rates.

The emirate's hotel inventory reached **171 properties**, offering approximately **34,000 rooms**, reflecting continued investment and confidence in Abu Dhabi as a leading travel destination.

Higher-end hotel properties (4 and 5-star hotels and deluxe hotel apartments) contributed significantly to overall revenue growth. Room revenues accounted for **62% of total revenues** and **grew by 22%**, driven by a **12% rise** in ADR and a 9% increase in occupancy rates.
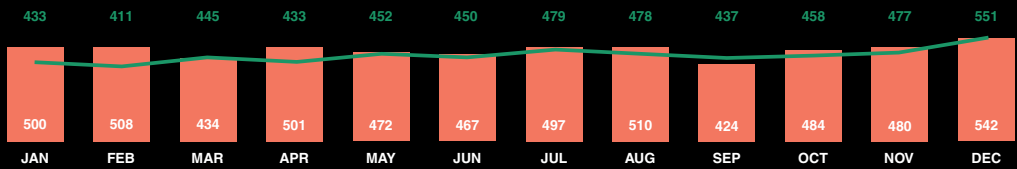
While 5 and 4-star hotels remain a key revenue driver, apartments experienced significant growth in popularity, with a **7.9% increase** in guest arrivals.
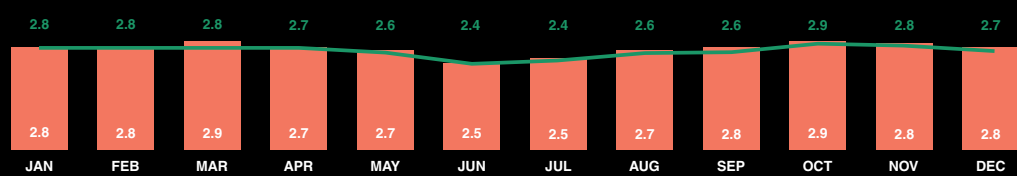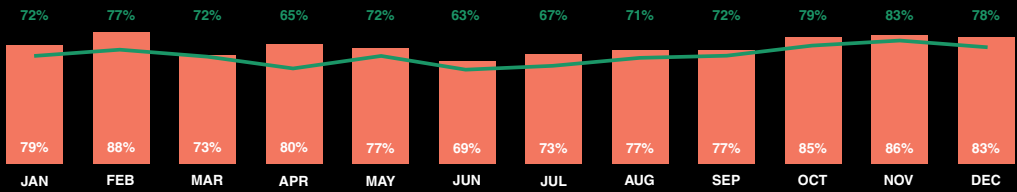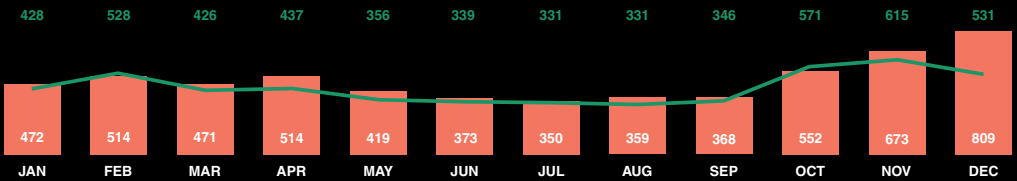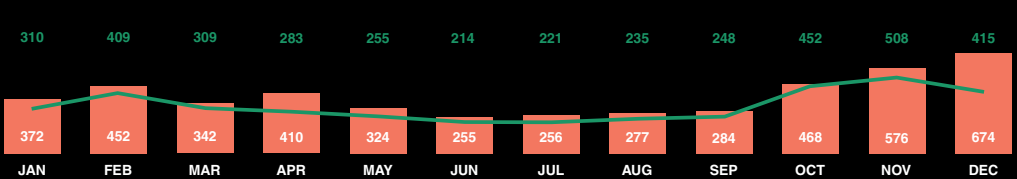
KEY KPI MONTHLY TRENDS

TOTAL GUESTS (K)

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
(line)	433	411	445	433	452	450	479	478	437	458	477	551
(bar)	500	508	434	501	472	467	497	510	424	484	480	542

YTD PERFORMANCE — 2023: 5,504 | 2024: 5,819 — **% CHANGE: +6%**

ALOS (NIGHTS)

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
(line)	2.8	2.8	2.8	2.7	2.6	2.4	2.4	2.6	2.6	2.9	2.8	2.7
(bar)	2.8	2.8	2.9	2.7	2.7	2.5	2.5	2.7	2.8	2.9	2.8	2.8

YTD PERFORMANCE — 2023: 2.7 | 2024: 2.7 — **% CHANGE: +3%**

OCCUPANCY

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
(line)	72%	77%	72%	65%	72%	63%	67%	71%	72%	79%	83%	78%
(bar)	79%	88%	73%	80%	77%	69%	73%	77%	77%	85%	86%	83%

YTD PERFORMANCE — 2023: 73% | 2024: 79% — **% CHANGE: +9%**

ADR (AED)

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
(line)	428	528	426	437	356	339	331	331	346	571	615	531
(bar)	472	514	471	514	419	373	350	359	368	552	673	809

YTD PERFORMANCE — 2023: 443 | 2024: 497 — **% CHANGE: +12%**

REVPAR (AED)

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
(line)	310	409	309	283	255	214	221	235	248	452	508	415
(bar)	372	452	342	410	324	255	256	277	284	468	576	674

YTD PERFORMANCE — 2023: 332 | 2024: 392 — **% CHANGE: +22%**

KEY TAKEAWAYS

1. The increase of high-value (high-spend) tourism is reflected in the growth of both ADR and RevPAR—a strong indicator of Abu Dhabi's ability to draw visitors that seek exceptional hospitality experiences.

2. The growth in international arrivals, particularly from emerging markets such as China, demonstrates the effectiveness of targeted marketing campaigns, international roadshows, and strategic partnerships with popular online platforms in attracting new audiences.

3. This sustained growth underscores Abu Dhabi's strong position as a global tourism hub, supported by strategic market outreach, enhanced hospitality offerings, and a growing appeal among international travellers.

4. Regional development is also demonstrating positive impact, with Al Ain Region and Al Dhafra Region contributing to overall tourism growth. Continued investment in these regions will be essential to further diversify Abu Dhabi's tourism offerings and ensure sustainable growth across the emirate.

Conclusion

Abu Dhabi's hotel sector demonstrated sustainable growth in 2024. By continuing to focus on high-value tourism, diversifying our source markets, and further developing regional offerings, the emirate is well positioned to achieve the ambitious targets set in the Abu Dhabi Tourism Strategy 2030.

GLOSSARY
& Methodology

KPI's	Definitions
Available rooms	It signifies the total number of rooms available for sale to guests. This is calculated by taking the total room inventory and subtracting the rooms not available for sale, such as Out of Order Rooms (OOO).
Occupied rooms	The total number of rooms occupied by hotel guests, including sold rooms, complimentary rooms, rooms allocated through loyalty programs, and rooms used internally by the hotel.
Occupancy rate	This is calculated by dividing the number of occupied rooms by the number of rooms available for sale.
Total Guests	Total Guests refers to the overall count of unique guests staying in a hotel during a specific time period. This includes both adults and children, as defined by each hotel's policies, as well as overnight and same-day guests.
Total Guest Nights	Guest Nights represent the total number of nights that guests stay in a hotel. This metric measures the combined duration of all guest stays, taking into account both the number of guests and the number of nights each guest occupies a room during a specified period.
Average length of stay (ALOS)	Average length of stay (ALOS) is a metric that calculates the mean duration (or number of nights) that guests spend at a hotel during their stay.
International & Domestic Guests	The nationality of guests is determined by collecting information from their passports or Emirates ID during the check-in process at the hotel. A guest's residency status is identified based on the personal identification document presented at check-in. International passport holders are classified as international guests, while Emirates ID holders are categorized as domestic guests.
Room revenue	Room Revenue refers to the income generated by a hotel from the sale of its rooms to guests.
Food & Beverage revenue	Room Revenue refers to the income generated by a hotel from the sale of its rooms to guests.
Other revenues	Other ancillary revenues is the sum of all other revenue generated by the hotel establishments.
Average daily rate (ADR)	This metric is derived by dividing room revenues by the number of occupied rooms. This ratio represents the average rate charged per room sold.
Revenue per available room (RevPAR)	This metric is derived by dividing room revenues by the number of available rooms. This ratio monitors a property's ability to fill its available rooms at an average rate.
Total revenues	Total Revenue is the sum of all revenue types generated by the hotel including Room Revenue, Total Food & Revenue, and Other Revenue.

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