

SHARJAH HOSPITALITY STATISTICS REPORT

Q3 - 2020

& Year – To - Date

Strategy – Research & Statistics Division
October 2020





TABLE OF CONTENTS

Executive summary	3
Hospitality Sector Performance.....	4
Key Source Markets Performance	6
Sector Performance – Key Indicators (Quarterly).....	7
Sector Performance – Key Indicators (Monthly).....	8
Key Indicators By Region.....	9
Key Indicators Per Hotel type	10
Year to Date Executive Summary (Q1 to Q3) 2020	11
Glossary	13





EXECUTIVE SUMMARY



3rd Quarter - 2020

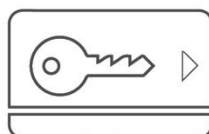
Sharjah Hotel Main Indicators

KEY PERFORMANCE INDICATORS

Guest	Occupancy Rate%	ALOS (days)
191,231 ▼ 47%	40% ▼ 9%	1.88 ▼ 1%
Total Revenue	RevPAR	ADR
AED 47,931,431 ▼ 46%	AED 63 ▼ 17%	AED 167 ▲ 11%



**105
HOTEL**



**6,594
ROOMS**

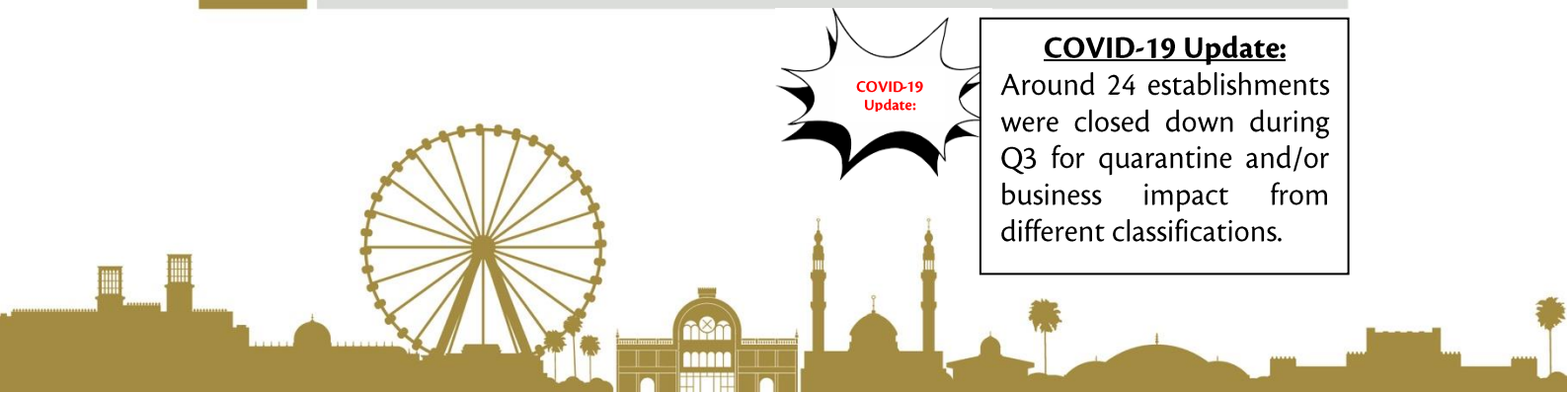
STAR RATING

5 STAR	4 STAR	1 - 3 STAR	APTS
12	20	31	42
628	1,643	2,037	2,286

COVID-19
Update:

COVID-19 Update:

Around 24 establishments were closed down during Q3 for quarantine and/or business impact from different classifications.

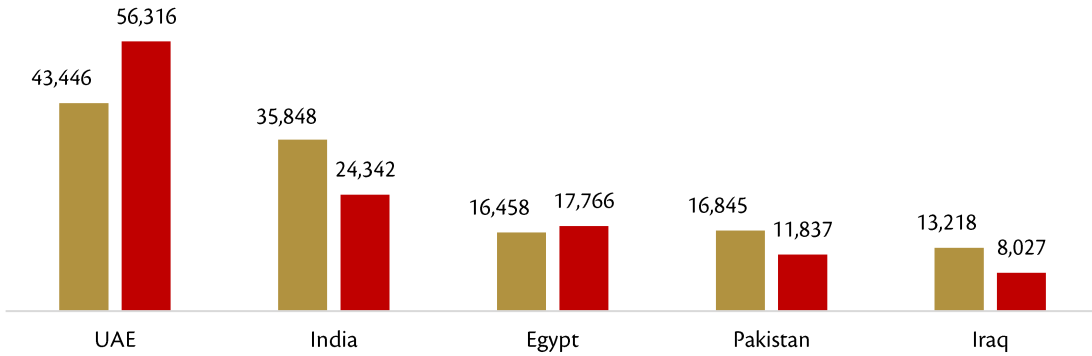




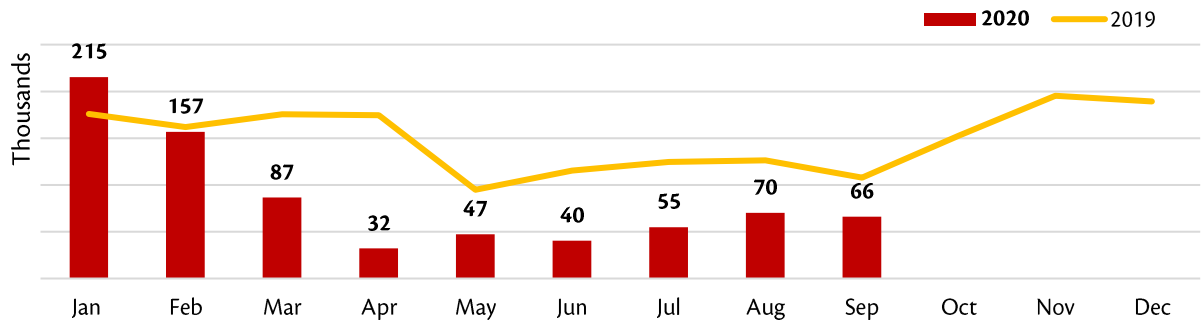
HOSPITALITY SECTOR PERFORMANCE

Top 5 Nationalities
(Hotel Establishments Guests)

■ YR2019 ■ YR2020



Hotel Guest Trend



HOTEL REVENUE – Q3



88,923,118

47,931,431



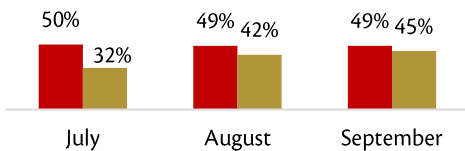
2019



2020

Occupancy Rate % - Q3

■ 2019 ■ 2020



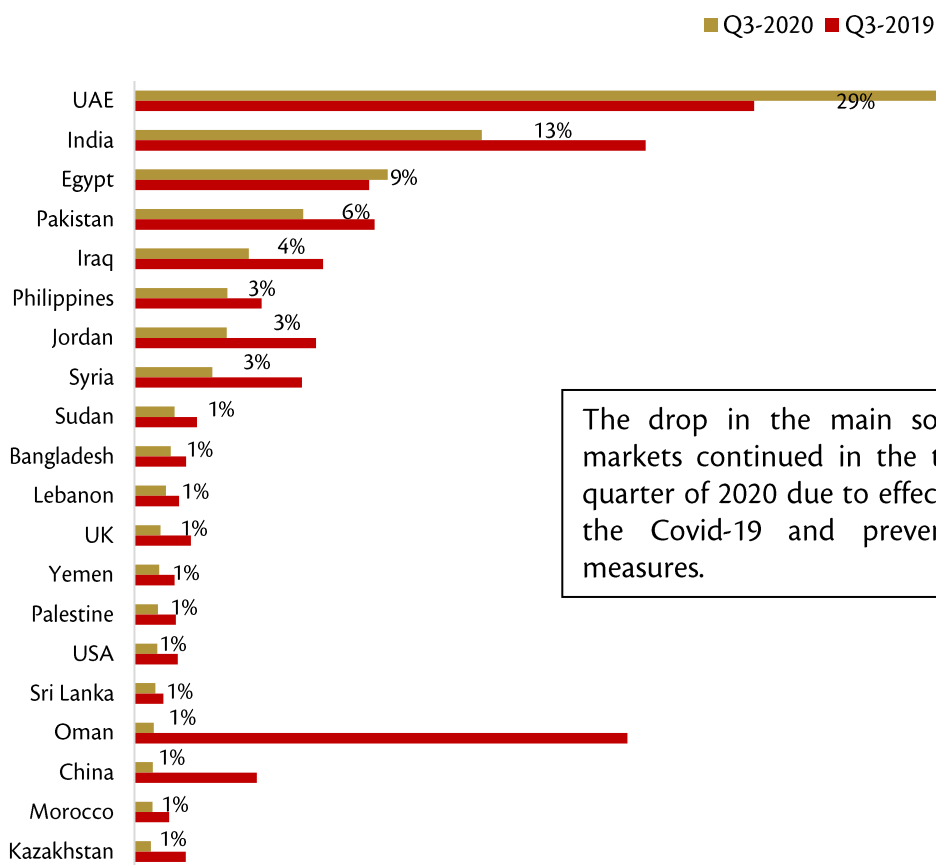
COVID-19 Update:

A slight recovery was noticed during Q3 in guest arrivals at Sharjah Hotels after lock-down period in UAE compared to the levels during second quarter.



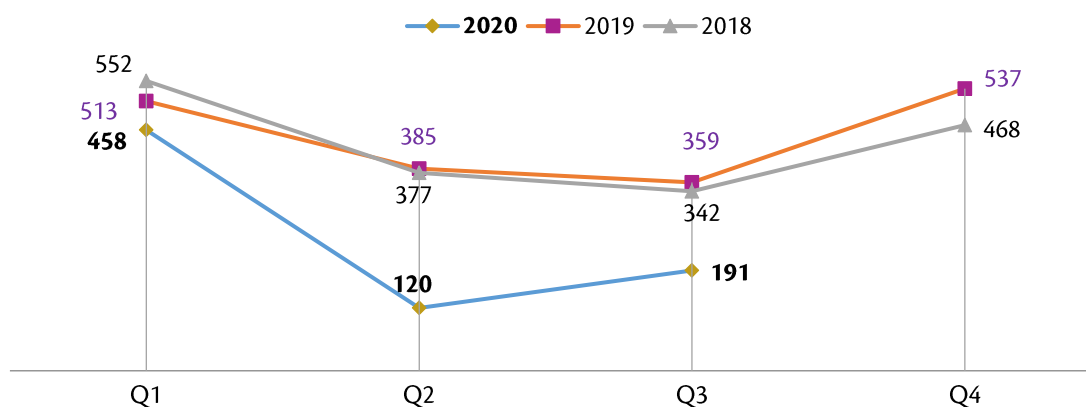
Top 20 Hotel Guests by Nationality & Market Share

ALOS Days	Nights Number	Growth %
1.55	87,532	30%
1.87	45,624	-32%
2.14	38,055	8%
1.63	19,300	-30%
3.18	25,515	-39%
1.97	12,799	-27%
1.99	12,856	-49%
2.15	11,755	-54%
1.99	5,589	-36%
1.81	4,616	-30%
1.98	4,367	-30%
2.15	3,910	-54%
2.26	3,909	-39%
2.43	3,978	-43%
1.34	2,148	-47%
1.59	2,349	-27%
1.71	2,305	-96%
1.65	2,142	-85%
2.28	2,913	-48%
2.01	2,333	-68%



The drop in the main source markets continued in the third quarter of 2020 due to effects of the Covid-19 and preventive measures.

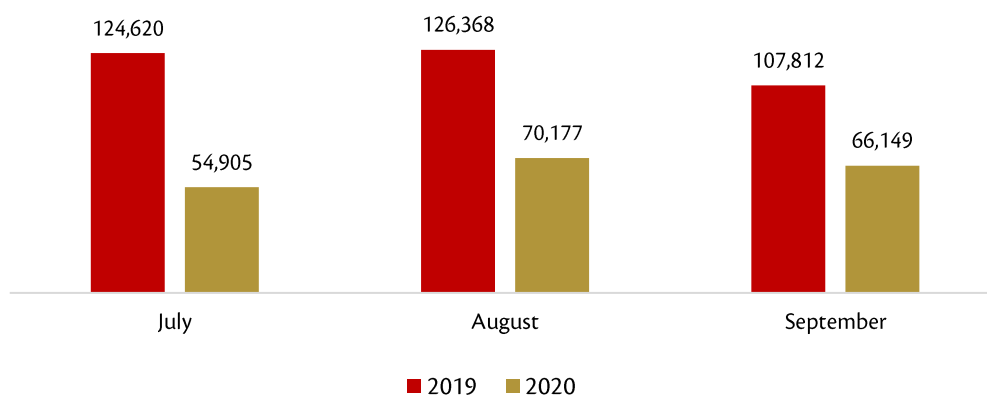
Evolution in the number of Hotels Guest (000)



KEY SOURCE MARKETS PERFORMANCE

India	Guest		Growth%		2020 %Share	Guest Night		Growth%	
	Yr2019	Yr2020				Yr2019	Yr2020		
Month									
July	11,462	7,120	▼	-38%	13%	20,136	14,174	▼	-30%
August	12,805	7,759	▼	-39%	11%	21,854	14,623	▼	-33%
September	11,581	9,463	▼	-18%	14%	22,574	16,827	▼	-25%
Q3	35,848	24,342	▼	-32%	13%	64,564	45,624	▼	-29%
China	Guest		Growth%		2020 %Share	Guest Night		Growth%	
	Yr2019	Yr2020				Yr2019	Yr2020		
Month									
July	2,661	389	▼	-85%	1%	4,385	459	▼	-90%
August	2,782	484	▼	-83%	1%	4,314	771	▼	-82%
September	3,127	422	▼	-87%	1%	4,973	912	▼	-82%
Q3	8,570	1,295	▼	-85%	1%	13,672	2,142	▼	-84%
Russia	Guest		Growth%		2020 %Share	Guest Night		Growth%	
	Yr2019	Yr2020				Yr2019	Yr2020		
Month									
July	3,110	152	▼	-95%	0%	9,433	690	▼	-93%
August	3,968	213	▼	-95%	0%	12,128	611	▼	-95%
September	9,106	415	▼	-95%	1%	24,540	1,169	▼	-95%
Q3	16,184	780	▼	-95%	0%	46,101	2,470	▼	-95%

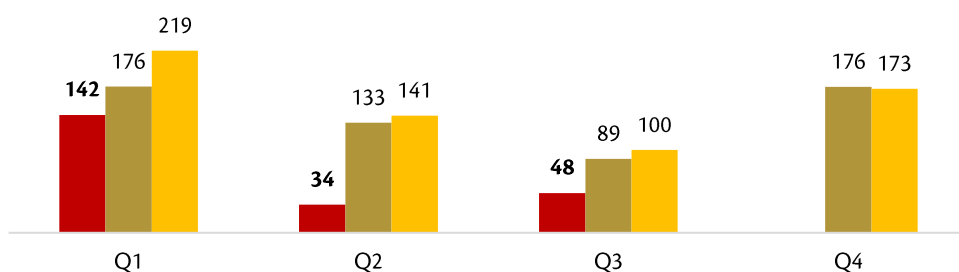
Guests Trend - Q3



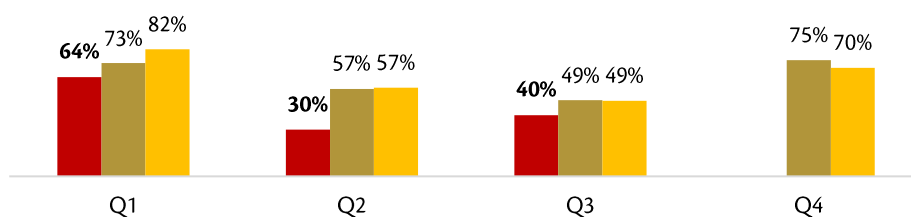
SECTOR PERFORMANCE – KEY INDICATORS (QUARTERLY)

■ 2020 ■ 2019 ■ 2018

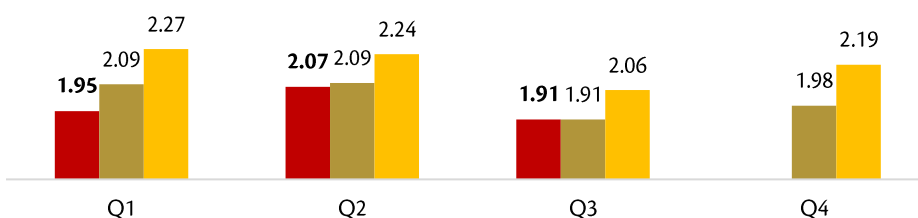
Revenue (AED Million)



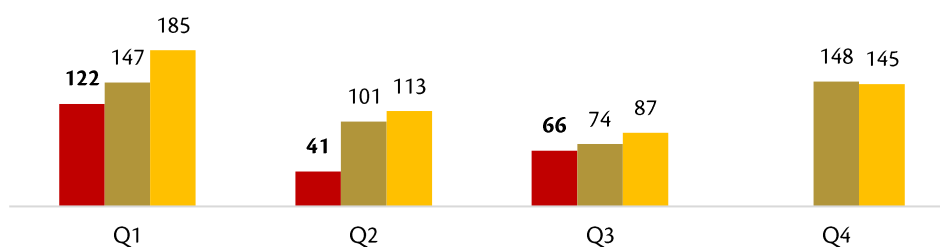
Occupancy %



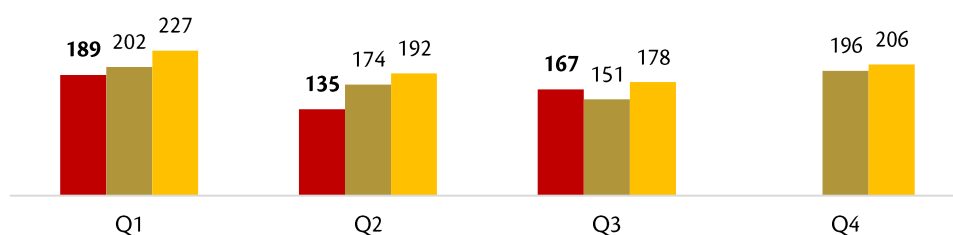
ALOS (DAYS)



REVPAR (AED)



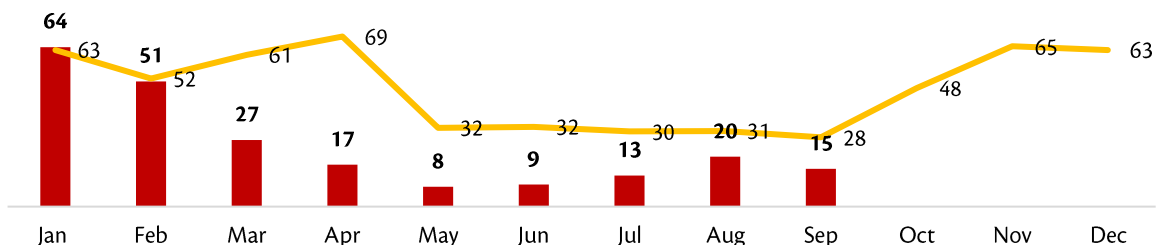
ADR (AED)



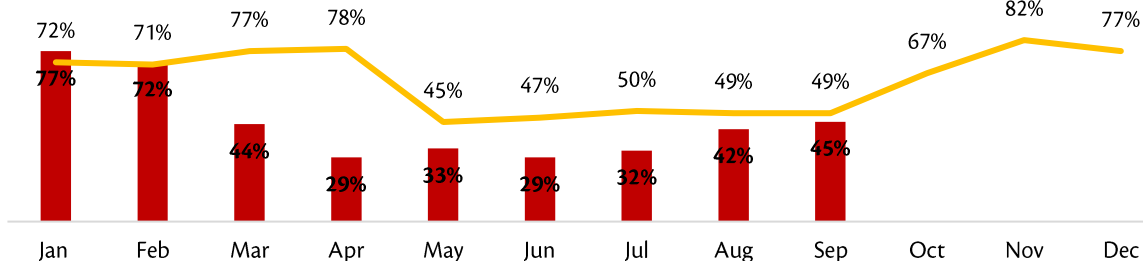
SECTOR PERFORMANCE – KEY INDICATORS (MONTHLY)

2020 2019

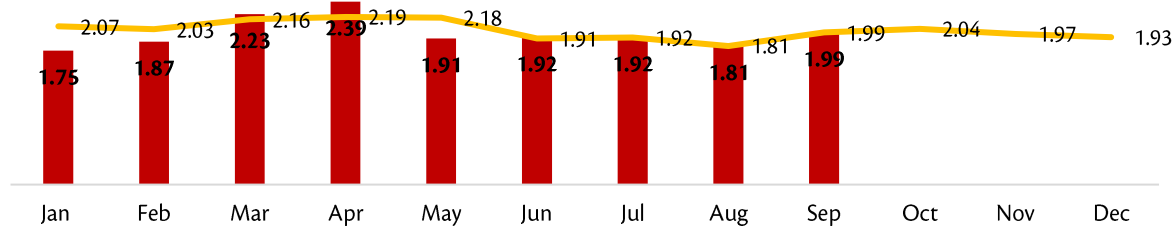
Revenue
(AED Million)



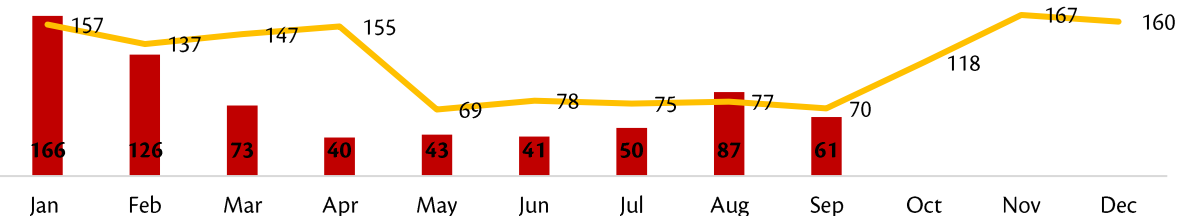
Occupancy %



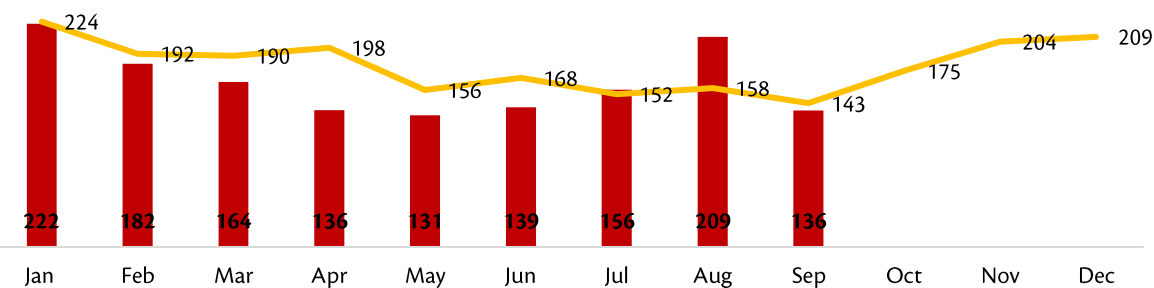
ALOS
(DAYS)



REVPAR
(AED)



ADR
(AED)

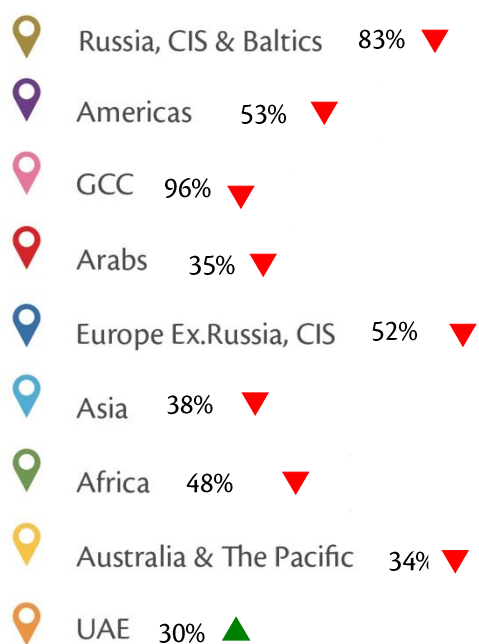




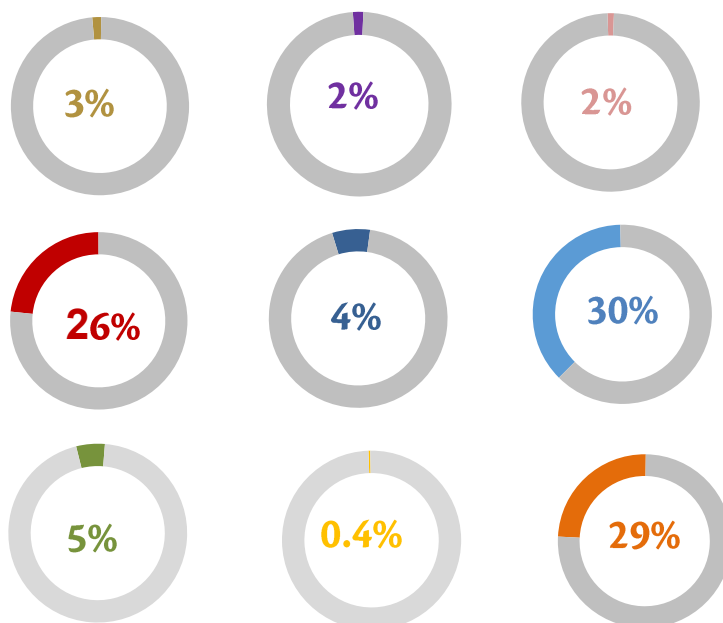
KEY INDICATORS BY REGION



GROWTH %



SHARE %





KEY INDICATORS PER HOTEL TYPE



★★★★★ 5-Star	Available Rooms	628					
	Occupancy	21%					
Number of Hotels:	ALOS	1.23					
12	RevPAR	101					
	Top 5 Nationalities	1) UAE	2) Jordan	3) India	4) Egypt	5) UK	
★★★★ 4-Star	Available Rooms	1,643					
	Occupancy	31%					
Number of Hotels:	ALOS	1.89					
20	RevPAR	49					
	Top 5 Nationalities	1) UAE	2) Egypt	3) India	4) Syria	5) Jordan	
★★★ 3-Star	Available Rooms	1,287					
	Occupancy	56%					
Number of Hotels:	ALOS	1.76					
12	RevPAR	66					
	Top 5 Nationalities	1) UAE	2) India	3) Egypt	4) Pakistan	5) Philippines	
★★ 2-Star	Available Rooms	428					
	Occupancy	36%					
Number of Hotels:	ALOS	1.86					
9	RevPAR	34					
	Top 5 Nationalities	1) India	2) Pakistan	3) UAE	4) Egypt	5) Bangladesh	
★ 1-Star	Available Rooms	322					
	Occupancy	32%					
Number of Hotels:	ALOS	2.21					
10	RevPAR	32					
	Top 5 Nationalities	1) India	2) Pakistan	3) Bangladesh	4) Philippines	5) Egypt	
Deluxe	Available Rooms	751					
	Occupancy	31%					
Number of Hotels:	ALOS	3.16					
6	RevPAR	98					
	Top 5 Nationalities	1) UAE	2) Egypt	3) Iraq	4) India	5) Philippines	
Standard	Available Rooms	694					
	Occupancy	51%					
Number of Hotels:	ALOS	1.13					
8	RevPAR	72					
	Top 5 Nationalities	1) UAE	2) India	3) Iraq	4) Egypt	5) Jordan	
Basic	Available Rooms	841					
	Occupancy	46%					
Number of Hotels:	ALOS	2.92					
28	RevPAR	49					
	Top 5 Nationalities	1) Egypt	2) India	3) Pakistan	4) Philippines	5) Iraq	





EXECUTIVE Year to Date SUMMARY (Q1 – Q3) 2020



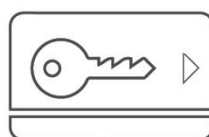
Jan to Sept - 2020

Sharjah Hotel Guests

Guest	Occupancy Rate%	ALOS (days)
769 K ▼ 39%	44% ▼ 16%	1.90 ▼ 7%
Total Revenue	RevPAR	ADR
AED 224 M ▼ 44%	AED 82 ▼ 27%	AED 164 ▼ 7%



105
HOTEL



6,594
ROOMS

STAR RATING

5 STAR	4 STAR	1 - 3 STAR	APTS
12	20	31	42
628	1,643	2,037	2,286

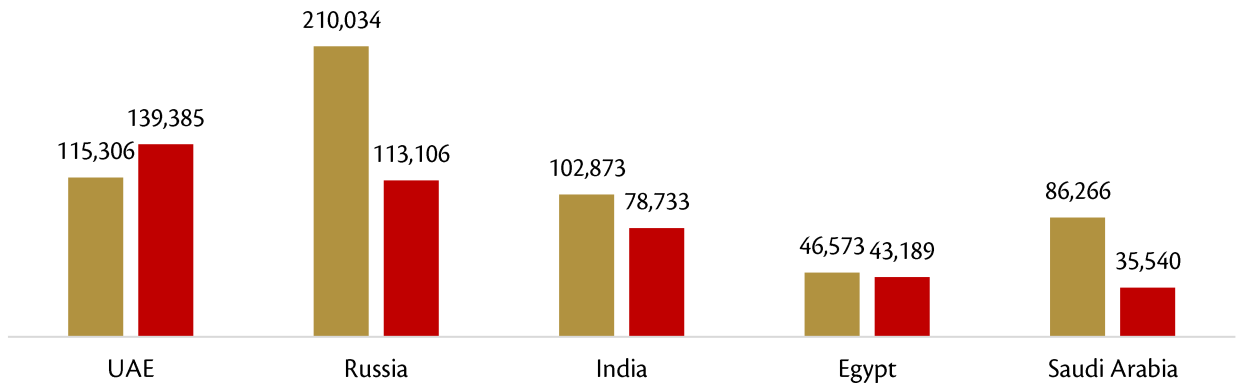




HOSPITALITY SECTOR PERFORMANCE

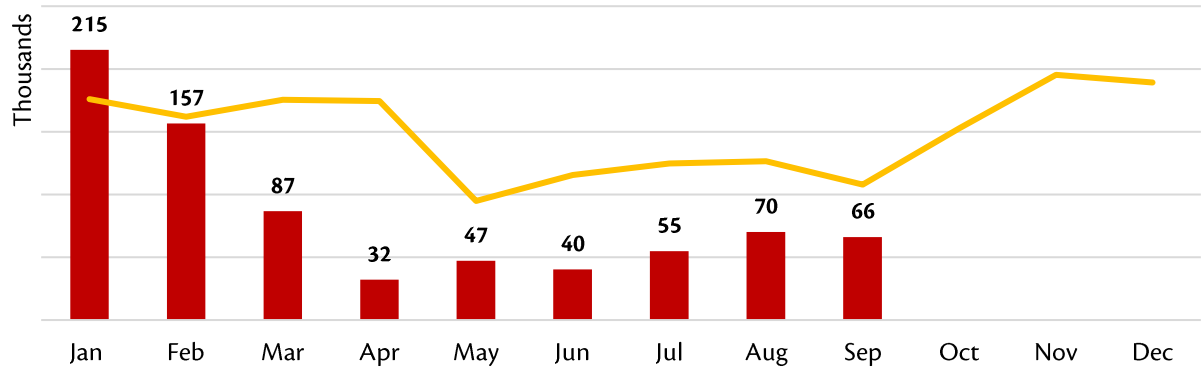
Top 5 Nationalities
(Hotel Establishments Guests)

■ YR2019 ■ YR2020



Hotel Guest Trend

■ 2020
— 2019





GLOSSARY

❖ ADR (Average Daily Rate)

A measure of the average rate paid for rooms sold, calculated by dividing room revenue by rooms sold.

$$ADR = \text{Room Revenue} / \text{Rooms Sold}$$

❖ Occupancy Rate

Occupancy is the percentage of available rooms that were sold during a specified period of time. Occupancy is calculated by dividing the number of rooms sold by rooms available.

$$\text{Occupancy} = (\text{Rooms Sold} / \text{Rooms Available}) \times 100$$

❖ RevPAR (Rev Per Available Room)

Revenue per Available Room (RevPAR) is the total guest room revenue divided by the total number of available rooms. RevPAR differs from average daily rate (ADR) because RevPAR is affected by the amount of unoccupied available rooms, while ADR shows only the average rate of rooms actually sold.

$$\text{RevPAR} = \text{Occupancy} \times \text{ADR}$$

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