Quarterly Report - Q1

Q1 – 2018

Strategy – Research & Statistics Division

4/30/2018

Contents

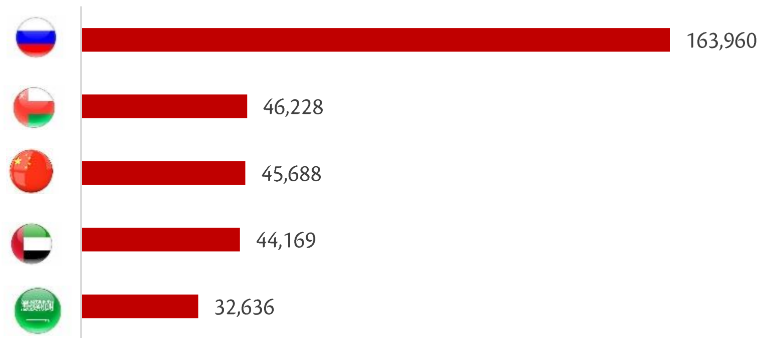
Q1 2018

1 EXECUTIVE SUMMARY

Sharjah Hotel Guests

541,780 ▲ **11%**

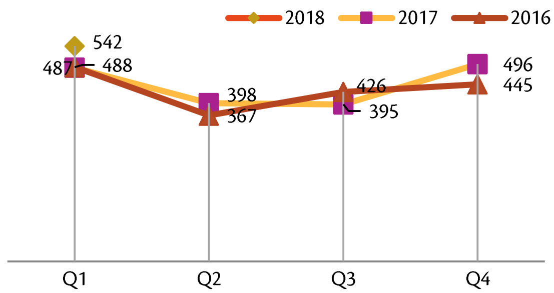
Top 5 Nationalities
(Hotel Establishments Guests)



Hospitality Sector Performance Vs. 2017

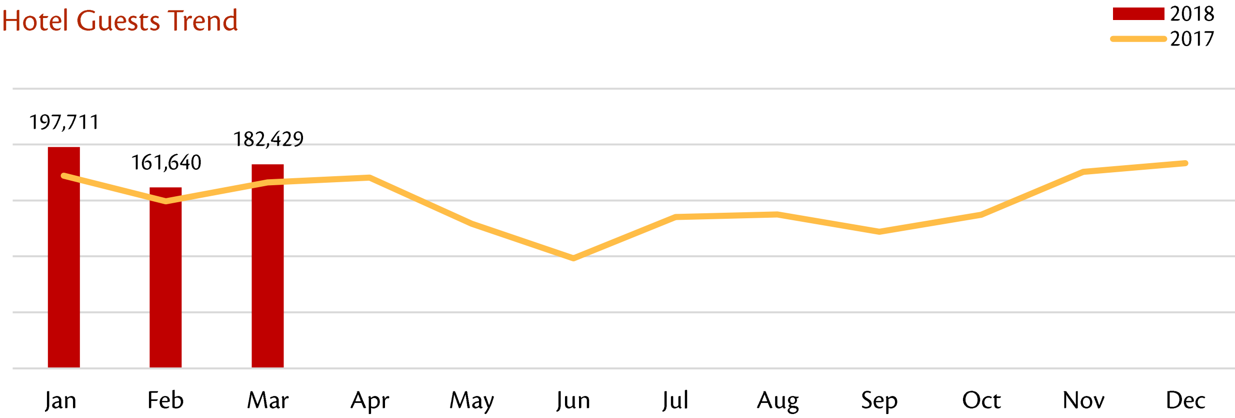
Occupancy rate	82%	▲ **5.0%**
Average Length of Stay	2.27	▲ **3.6%**
RevPAR	185	▲ **1.4%**
Total Revenue	219 Million AED	▲ **4.7%**

Evolution in the number of Hotels Guest (000)

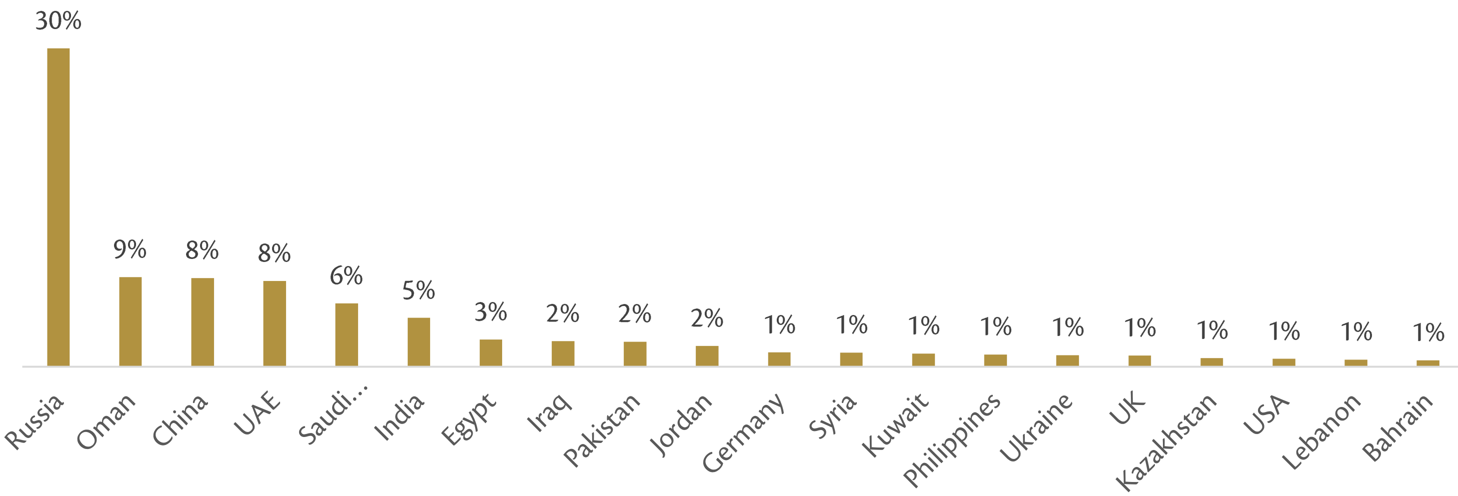


2 HOSPITALITY SECTOR PERFORMANCE

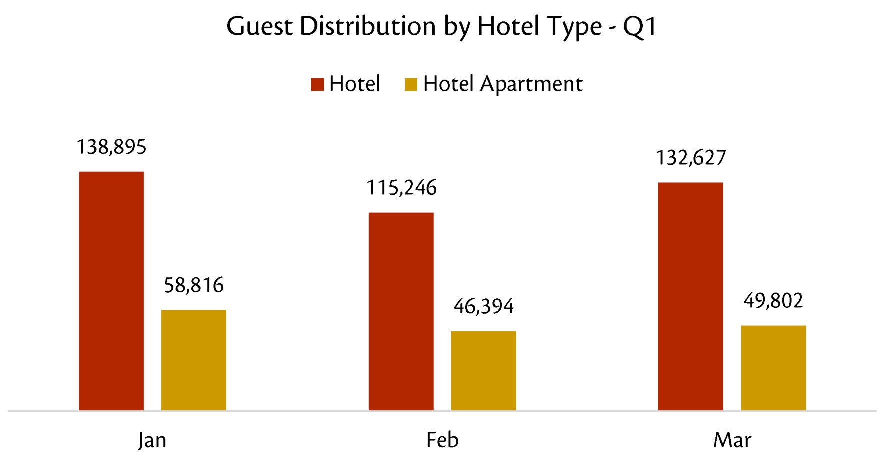
Hotel Guests Trend



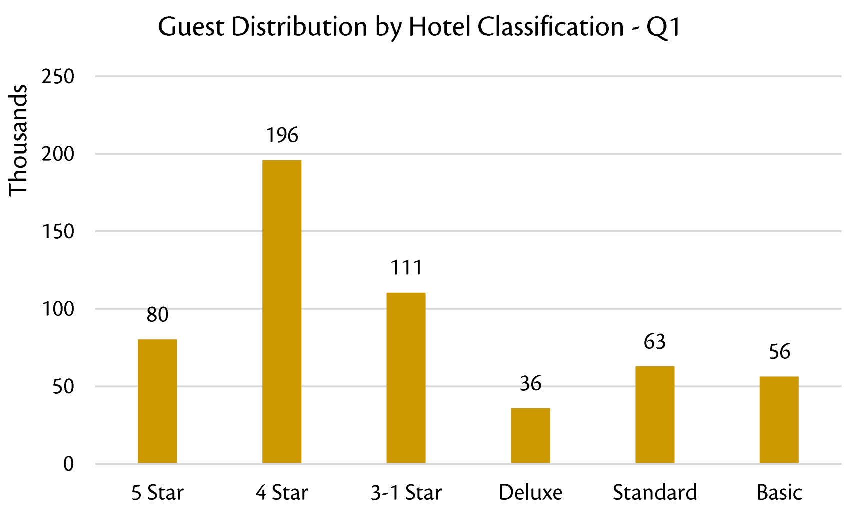
%Share of Hotel Establishment Guets By Nationality during First Quarter

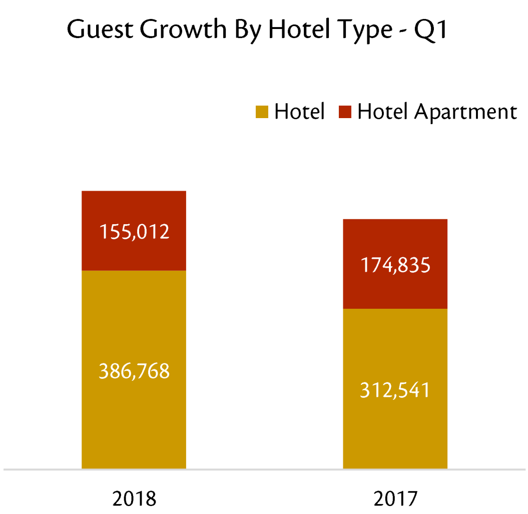


3 GUESTS ANALYSIS



Hotels and Hotel Apartment maintained a stable share of guests during the first quarter of approximately 3:1 in all months

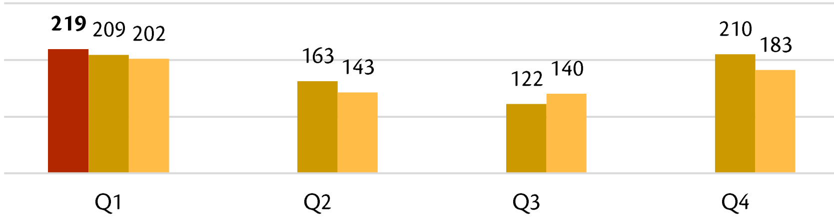




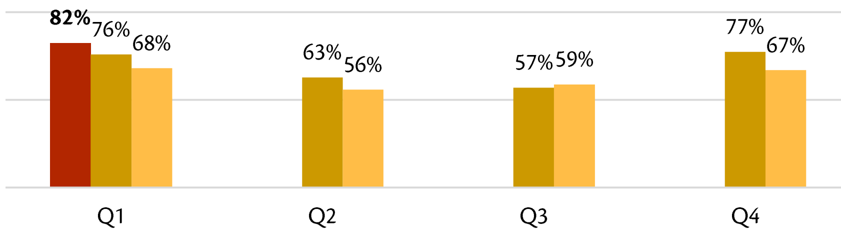
4 Sector Performance – Key Indicators (Quarterly)

2018 2017 2016

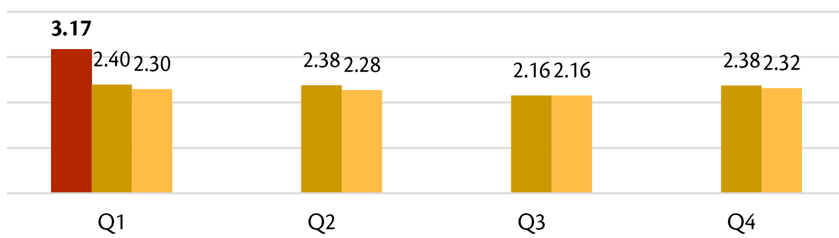
Revenue
(AED Million)



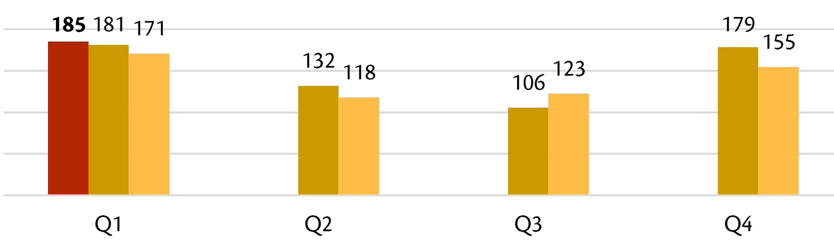
Occupancy %



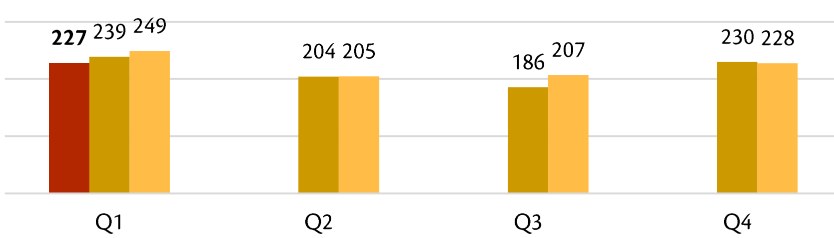
ALOS (DAYS)



REVPAR (AED)

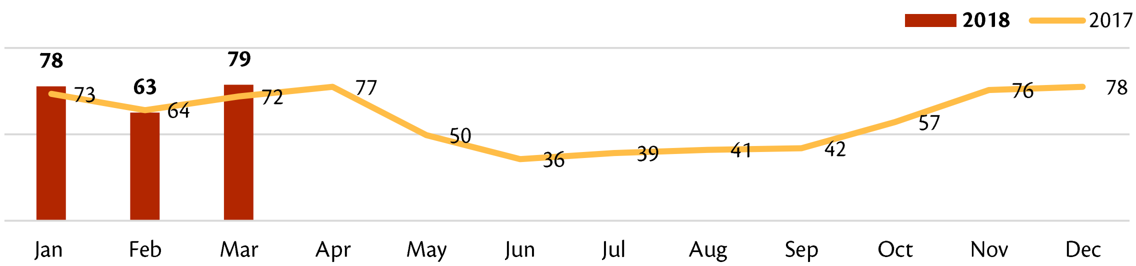


ADR (AED)

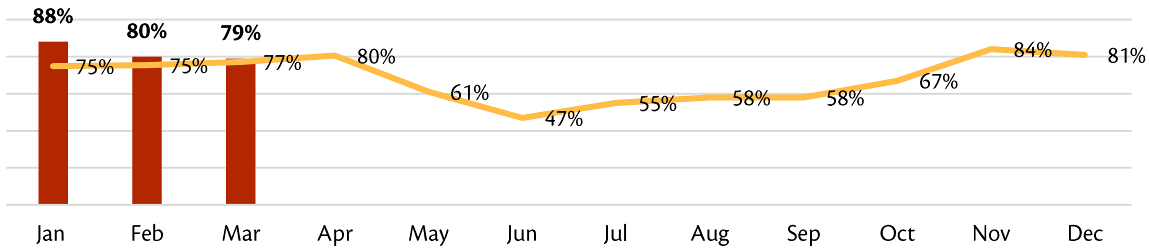


5 Sector Performance – Key Indicators (Monthly)

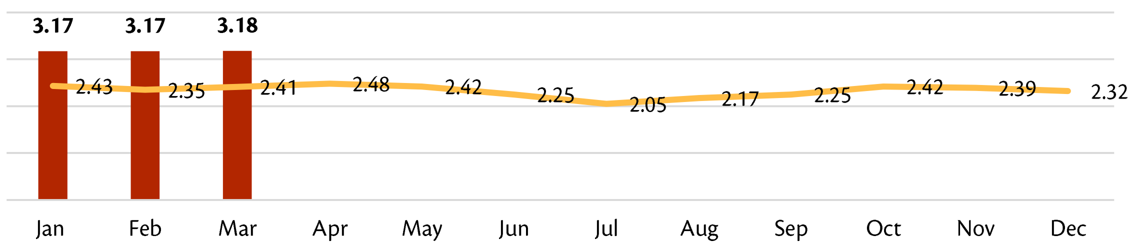
Revenue
(AED Million)



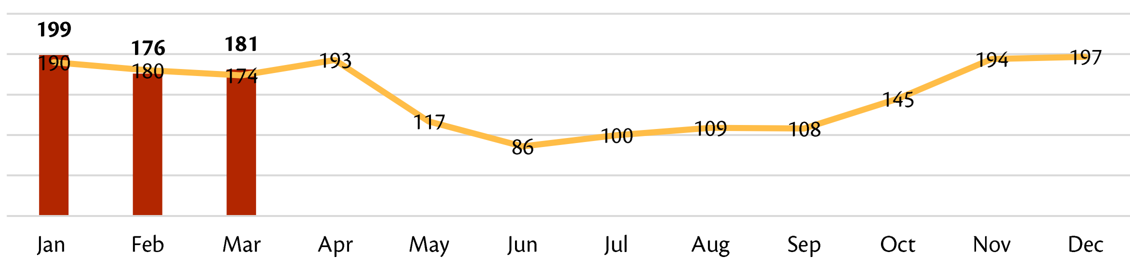
Occupancy %



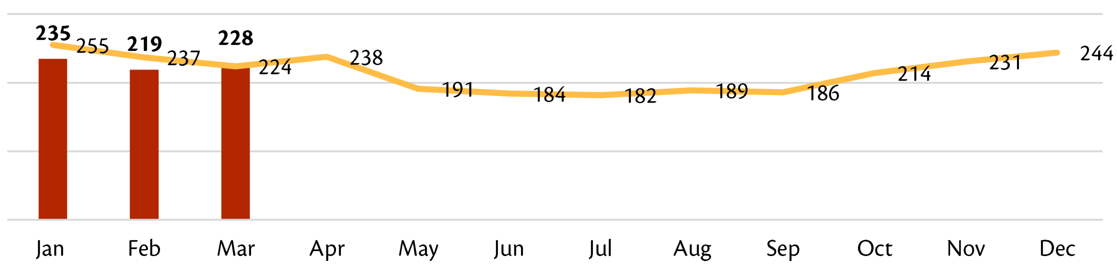
ALOS (DAYS)



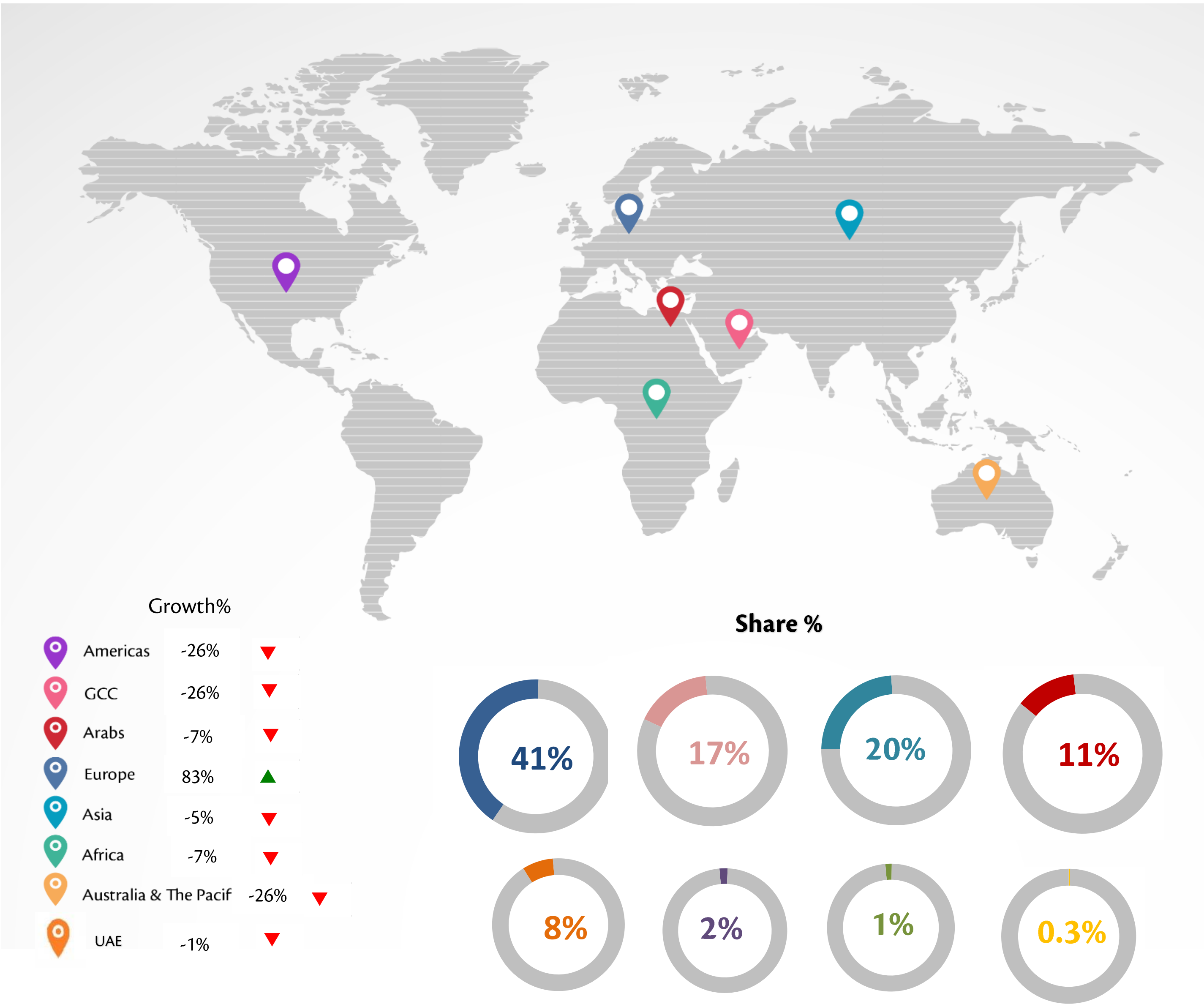
REVPAR (AED)



ADR (AED)



6 Key Indicators By Region



7 KEY INDICATORS PER HOTEL TYPE:

Hotel Type	Number of Hotels	Available Rooms	Occupancy	ALOS	RevPAR	Top 5 Nationalities
★★★★★ 5-Star	6	1,306	89%	2.24	282	
★★★★ 4-Star	18	2,480	88%	1.81	212	
★★★ 3-Star	12	1,649	86%	3.07	180	
★★ 2-Star	10	725	63%	2.57	111	
★ 1-Star	11	401	74%	2.58	78	
Deluxe	6	751	78%	2.74	186	
Standard	7	815	77%	1.83	179	
Basic	32	1,395	72%	2.88	123	

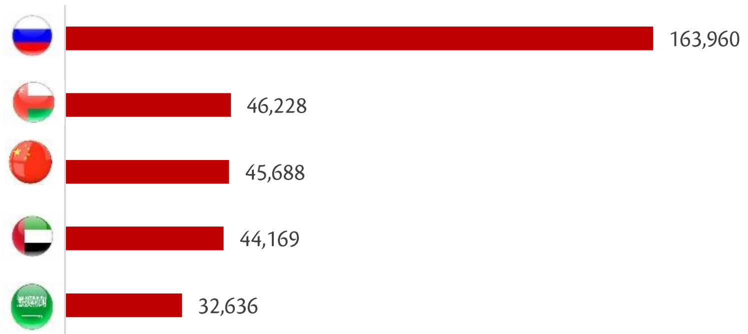
Year-To-Date 2018

8 EXECUTIVE SUMMARY YTD

Sharjah Hotel Guests

541,780 ▲ **11%**

Top 5 Nationalities
(Hotel Establishments Guests)



Hospitality Sector Performance

Occupancy rate	82%	▲ 5.0%
Average Length of Stay	2.27	▲ 3.6%
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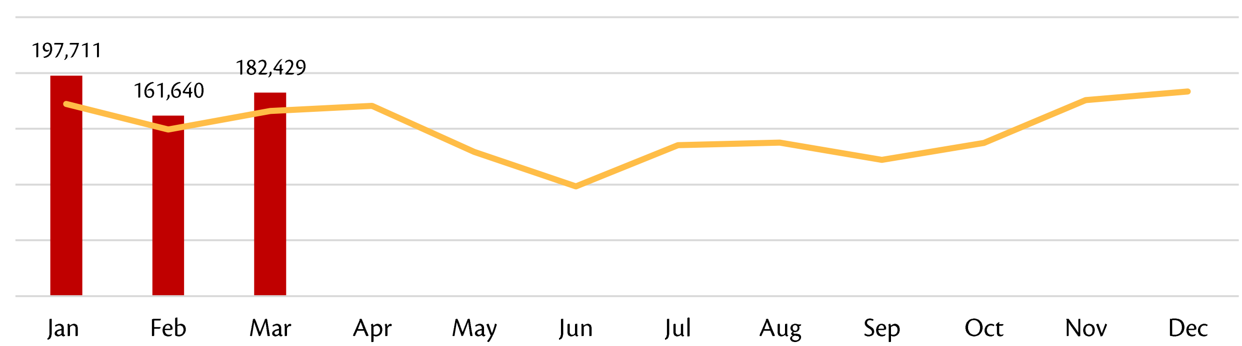
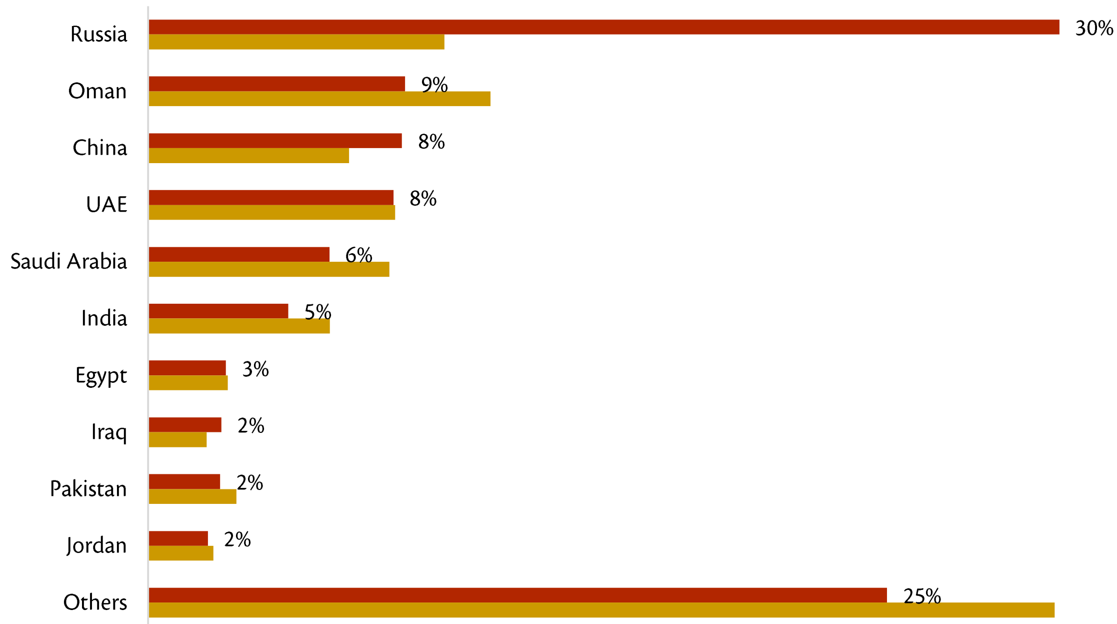
9 Hospitality Sector Performance YTD

Hotel Guests Trend



ALOS (DAYS)	Growth %
2.88	208%
1.42	-25%
1.35	26%
1.41	-1%
2.08	-25%
2.03	-23%
2.91	-2%
3.30	25%
2.08	-18%
2.31	-9%
2.36	-18%

%Share of Hotel Guets By Nationality Q1 2018



10 GLOSSARY:

❖ ADR (Average Daily Rate)

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

ADR = Room Revenue / 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.

Occupancy = (Rooms Sold / Rooms Available) x 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.

RevPAR = Occupancy x ADR

Country Flag Key:

UAE	Oman	Kazakhstan
Saudi Arabia	Egypt	Jordan
Germany	Iraq	Kenya
Russia	China	
India	Lebanon	
Philippines	Sri Lanka	
Pakistan	Other Europe	
Bangladesh	UK	