

Quarterly Report - Q1

Q1 – 2018

Strategy – Research & Statistics Division

4/30/2018

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Q1 2018



1 EXECUTIVE SUMMARY

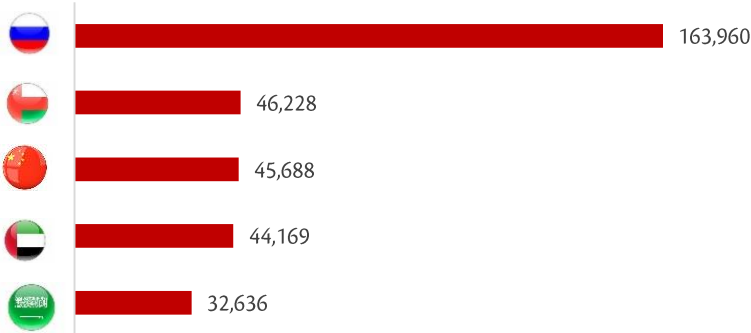
Sharjah Hotel Guests

541,780



11%

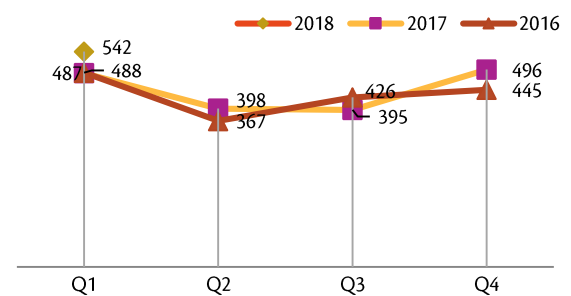
Top 5 Nationalities (Hotel Establishments Guests)



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%

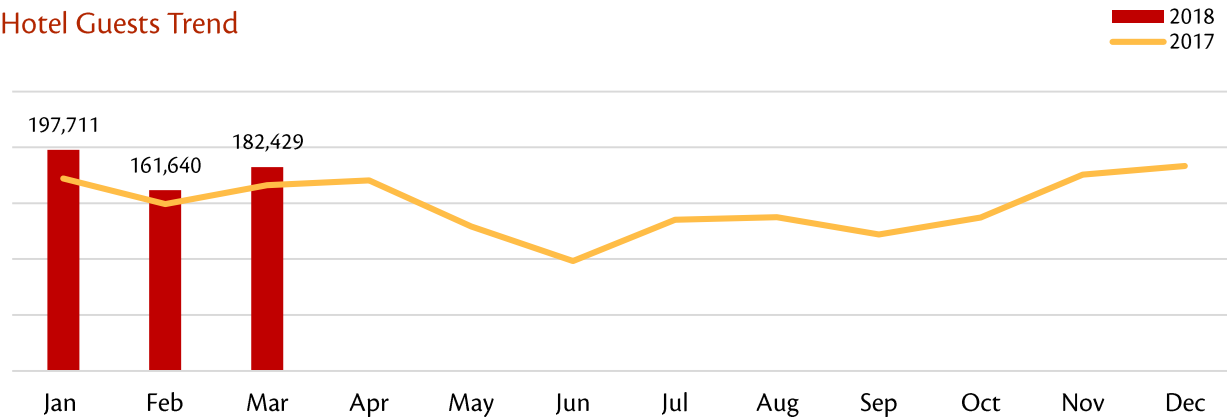
Evolution in the number of Hotels Guest
(000)



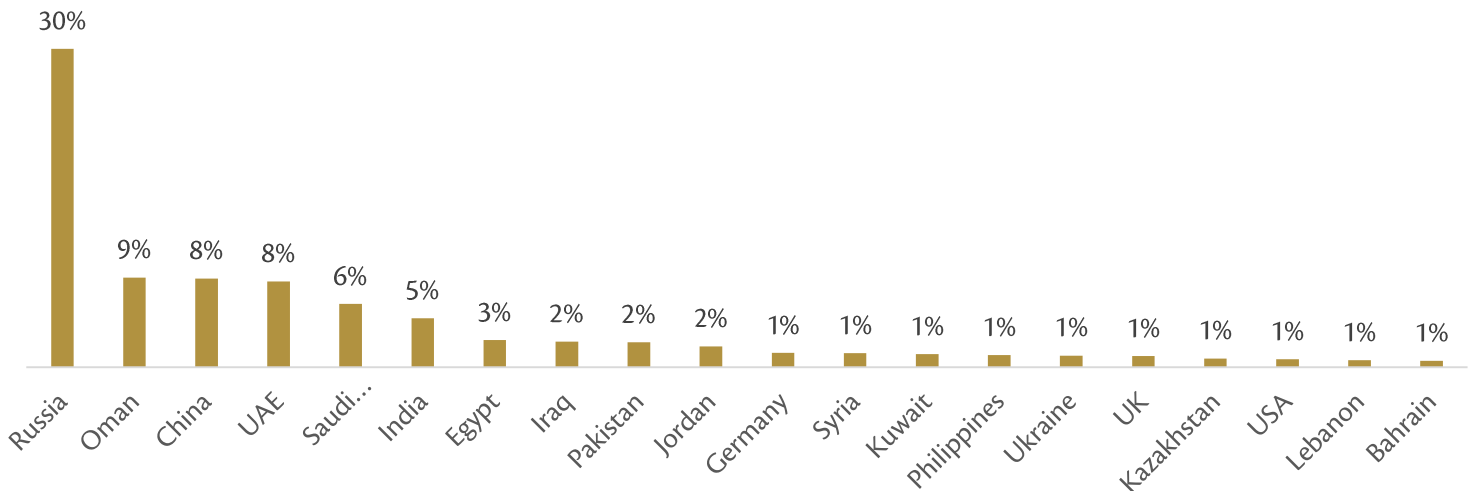


2 HOSPITALITY SECTOR PERFORMANCE

Hotel Guests Trend

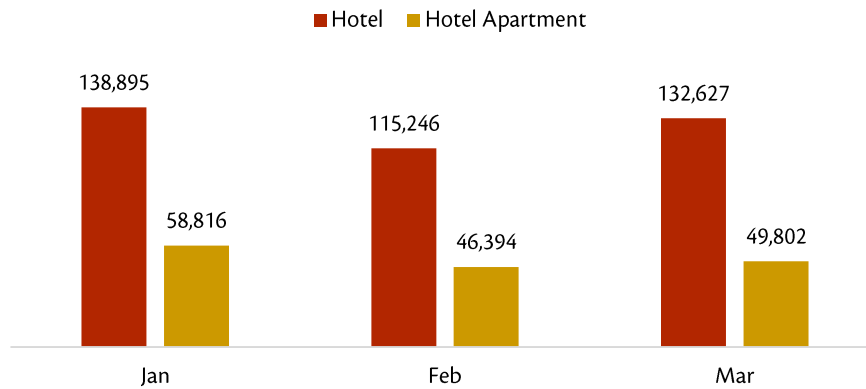


%Share of Hotel Establishment Guets By Nationality during First Quarter



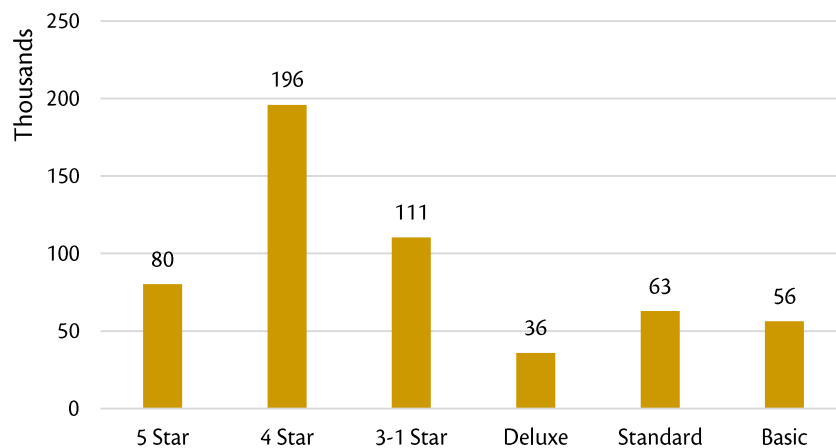
3 GUESTS ANALYSIS

Guest Distribution by Hotel Type - Q1

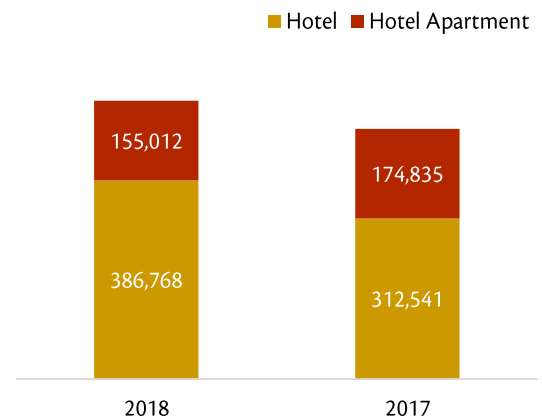


Hotels and Hotel Apartment maintained a stable share of guests during the first quarter of approximately 3:1 in all months

Guest Distribution by Hotel Classification - Q1



Guest Growth By Hotel Type - Q1

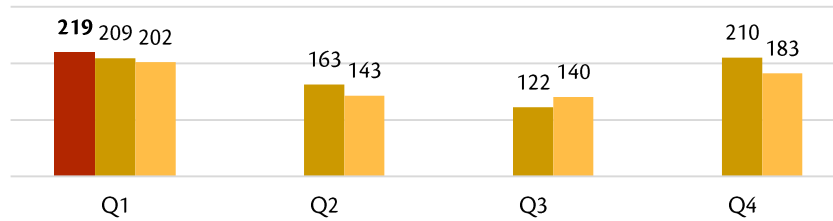


4 SECTOR PERFORMANCE – KEY INDICATORS (QUARTERLY)

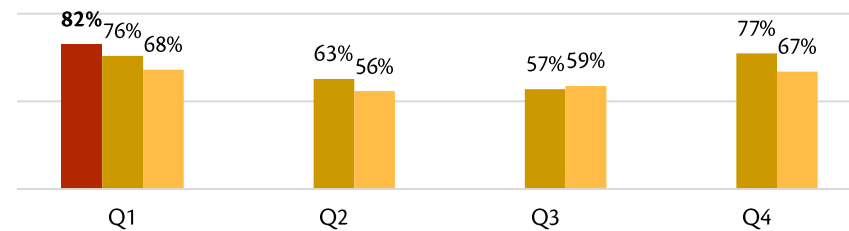
■ 2018 ■ 2017 ■ 2016

Revenue

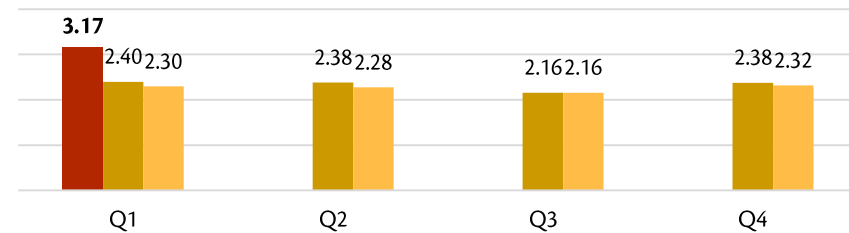
(AED Million)



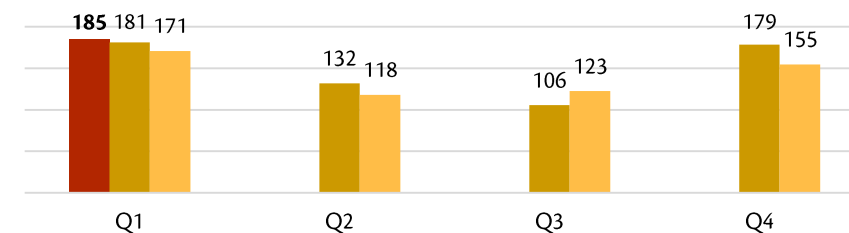
Occupancy %



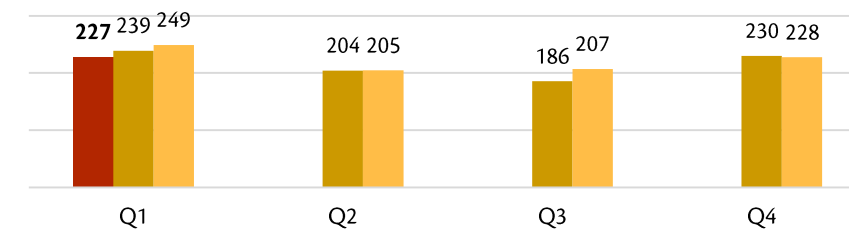
ALOS (DAYS)



REVPAR (AED)



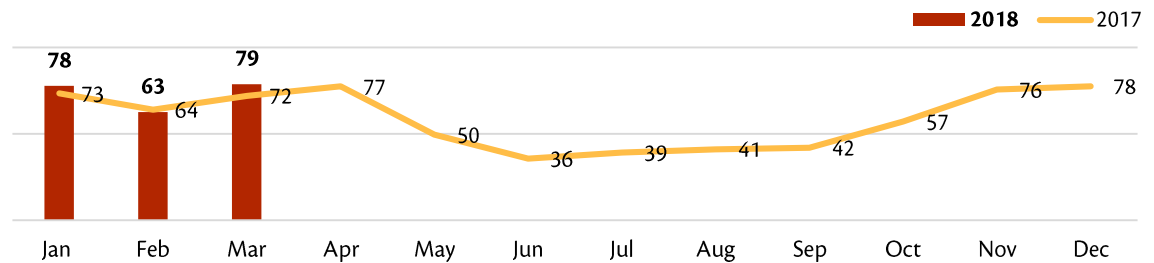
ADR (AED)



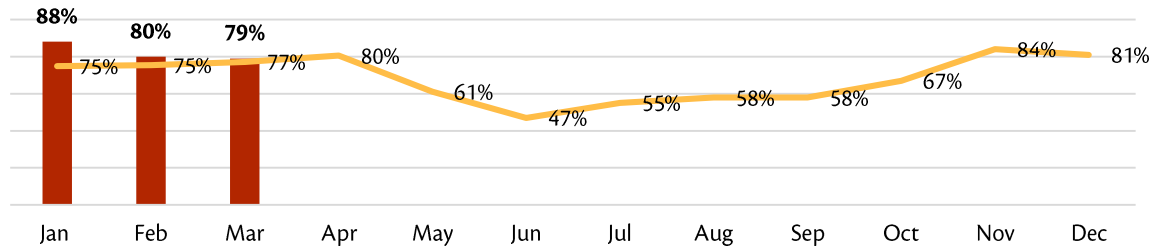
5 SECTOR PERFORMANCE – KEY INDICATORS (MONTHLY)

Revenue

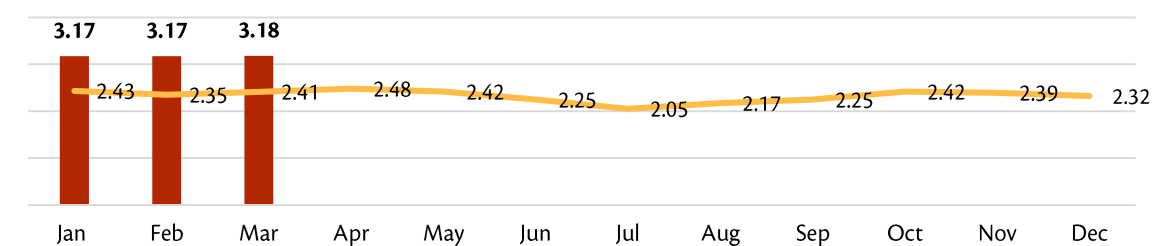
(AED Million)



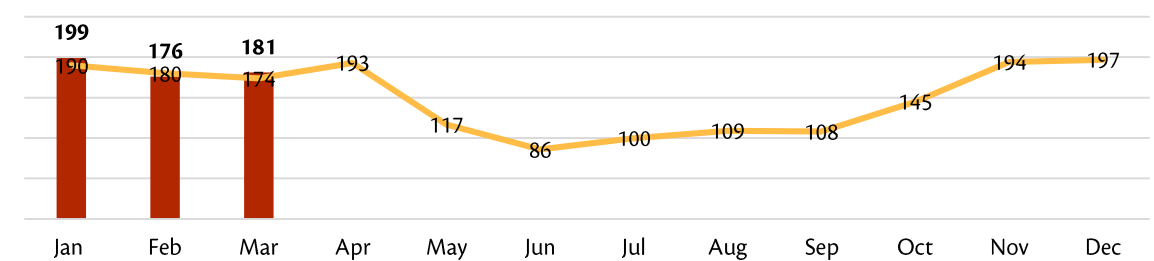
Occupancy %



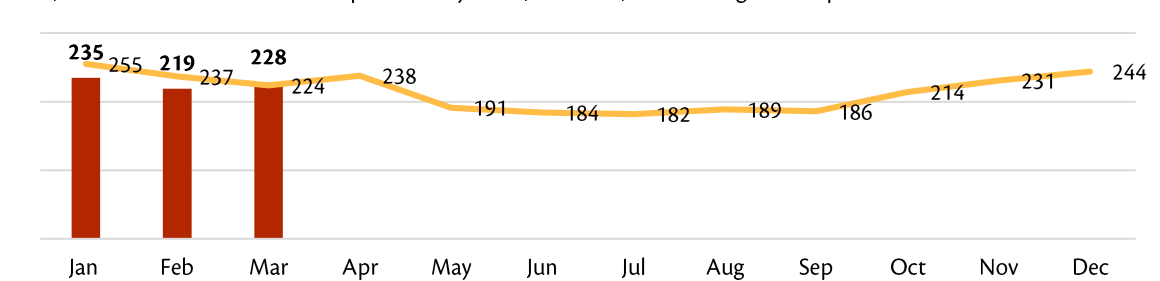
ALOS (DAYS)



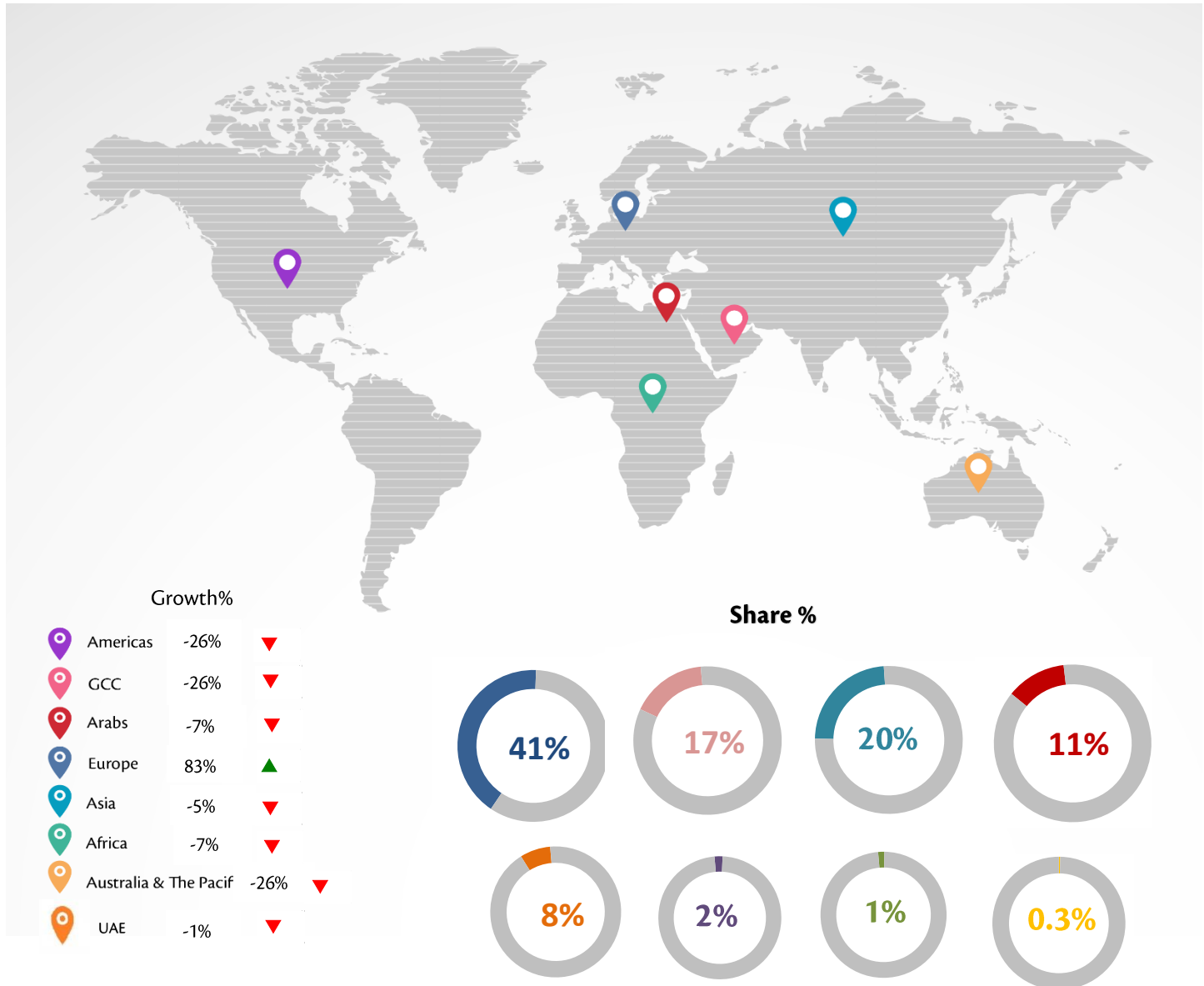
REVPAR (AED)



ADR (AED)



6 KEY INDICATORS BY REGION





7 KEY INDICATORS PER HOTEL TYPE:

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

Year-To-Date 2018



8 EXECUTIVE SUMMARY YTD

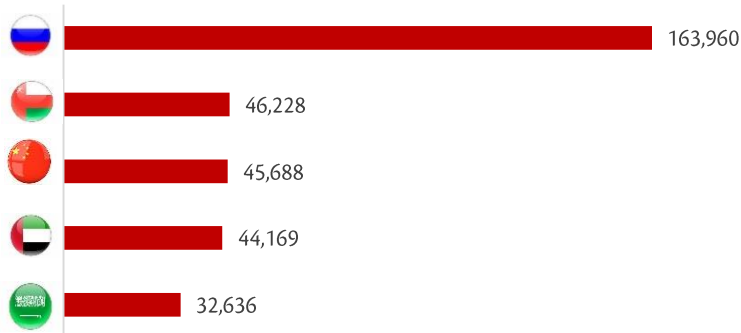
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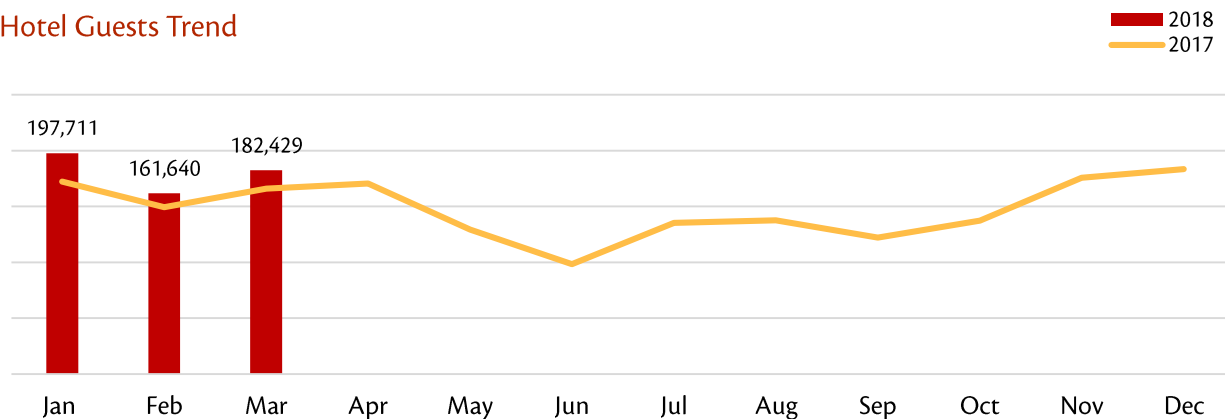
Hospitality Sector Performance

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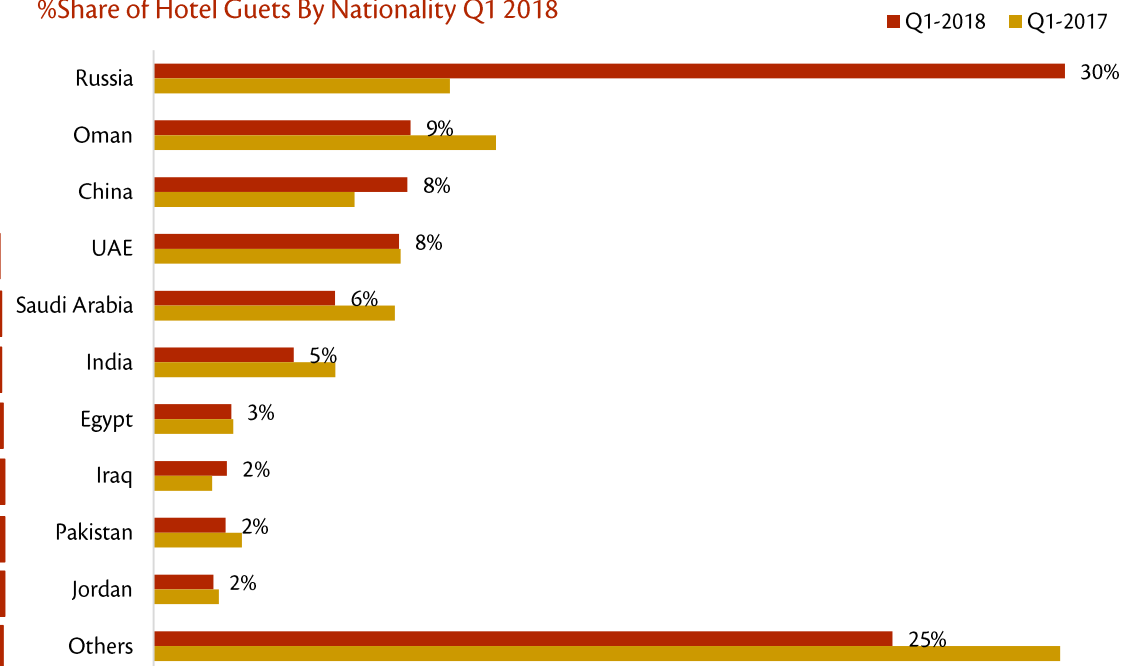
9 HOSPITALITY SECTOR PERFORMANCE YTD

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 Guests 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.

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

❖ 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.

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

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			