SHARJAH HOSPITALITY
STATISTICS REPORT

Q1 - 2020

Strategy – Research & Statistics Division
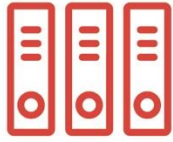April 29, 2020

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1st Quarter - 2020

Sharjah Hotel Main Indicators

KEY PERFORMANCE INDICATORS

Guest	Occupancy Rate%	ALOS (days)
458,494 ▼ 11%	64% ▼ 10%	1.88 ▼ 10%
Total Revenue	**RevPAR**	**ADR**
AED 141,813,795 ▼ 19.5%	AED 132 ▼ 12%	AED 189 ▼ 6.4%

105 HOTEL
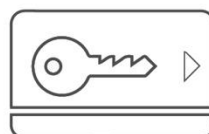
8,478 ROOMS

STAR RATING

5 STAR	4 STAR	1 - 3 STAR	APTS
12	20	31	42
1,072	2,562	2,555	2,289

HOSPITALITY SECTOR PERFORMANCE

Top 5 Nationalities
(Hotel Establishments Guests)

YR2019 ■ YR2020 ■

Nationality	YR2019	YR2020
Russia	119,511	111,935
UAE	37,186	53,907
Saudi Arabia	30,025	33,757
India	32,329	32,773
Oman	54,346	28,301

Hotel Guests Trend

2020 ■ 2019 —

Thousands

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2020	215	157	87									

HOTEL REVENUE – Q1
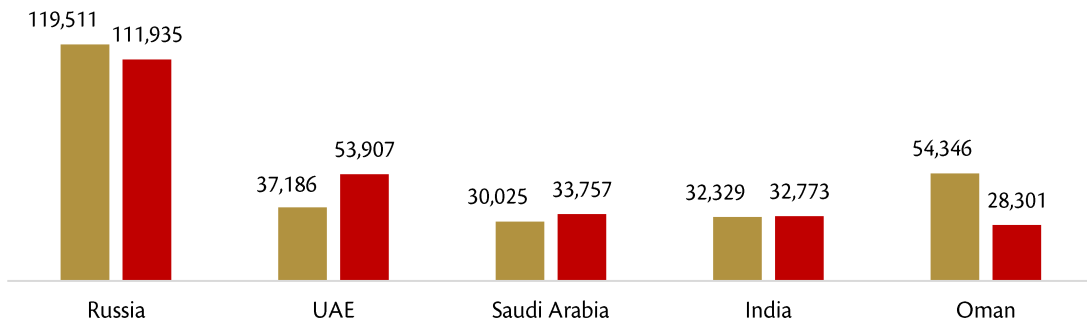
176,145,674
2019
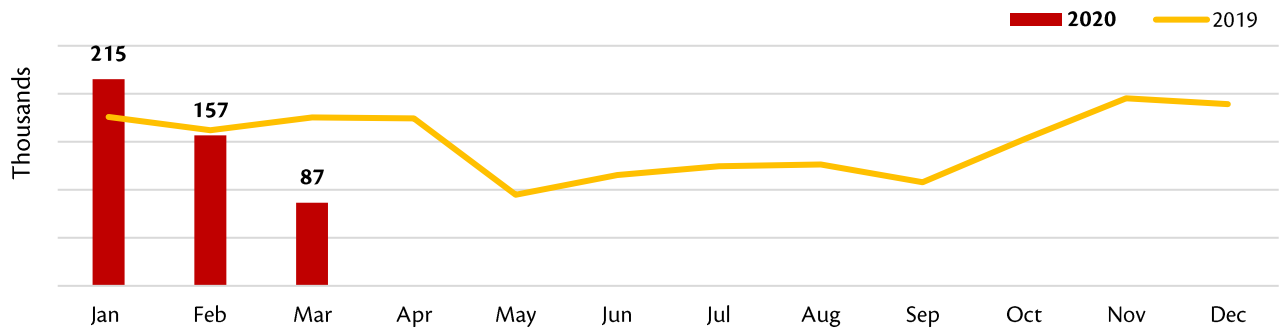
141,813,795
2020

Average Occupancy Rate - Q1

—— 2019
—— 2020

Month	2019	2020
January	77%	72%
February	71%	72%
March	77%	44%

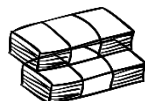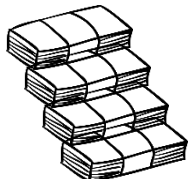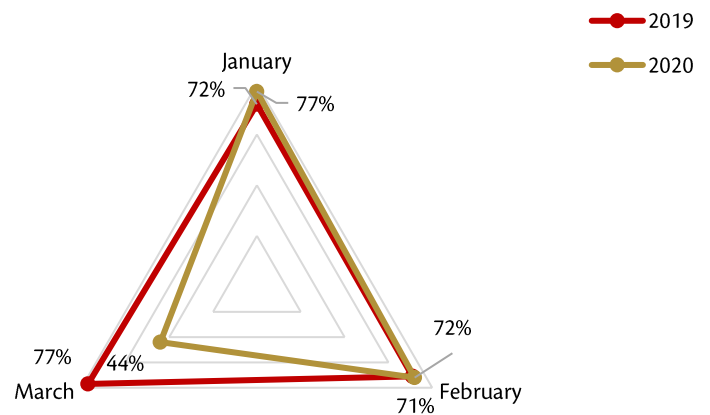## Top 20 Hotel Guests by Nationality & Market Share

ALOS Days	Nights Number	Growth %
2.47	276,237	-6%
1.04	55,875	45%
1.79	60,404	12%
1.74	57,014	1%
1.41	39,835	-48%
2.82	44,488	5%
1.73	22,935	-10%
3.23	35,756	-44%
2.04	19,224	-25%
1.52	12,814	-75%
2.24	17,492	-17%
2.26	14,649	0%
1.98	10,911	-3%
1.50	8,201	-37%
1.61	7,711	-39%
1.40	6,051	-1%
1.88	7,153	-33%
2.86	10,260	-34%
2.85	8,398	-20%
1.03	3,011	68%

■ Q1-2019   ■ Q1-2020

Nationality	Market Share
Russia	24%
UAE	12%
Saudi Arabia	7%
India	7%
Oman	6%
Egypt	3%
Pakistan	3%
Iraq	2%
Jordan	2%
China	2%
Syria	2%
Ukraine	1%
Philippines	1%
Germany	1%
UK	1%
USA	1%
Kuwait	1%
Kazakhstan	1%
Sudan	1%
Indonesia	1%
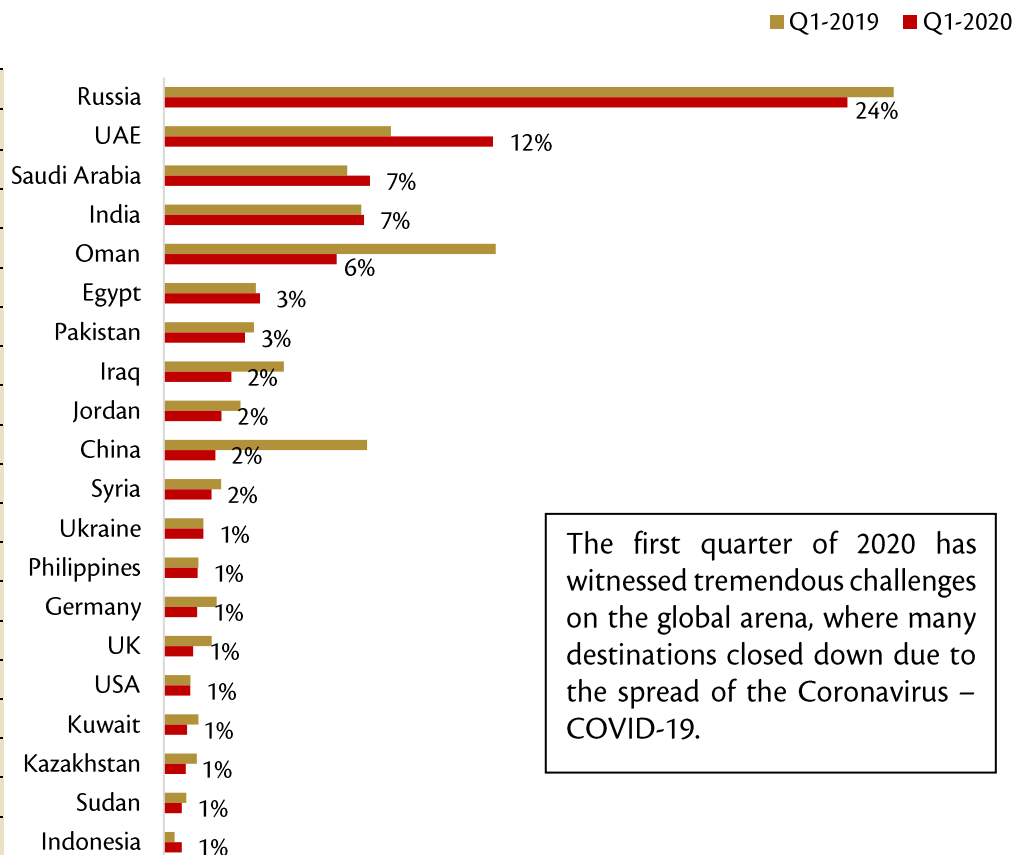
The first quarter of 2020 has witnessed tremendous challenges on the global arena, where many destinations closed down due to the spread of the Coronavirus – COVID-19.

Evolution in the number of Hotels Guest (000)

◆ 2020   ■ 2019   ▲ 2018

	Q1	Q2	Q3	Q4
2020	458			
2019	513	385	359	537
2018	552	377	342	468
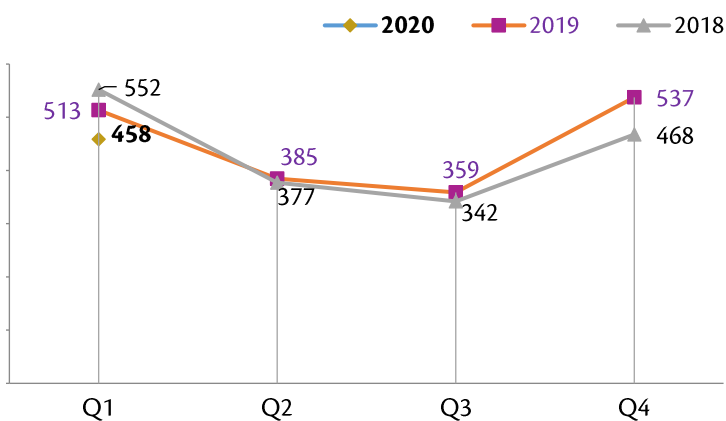
Hotel Establishments Room Demand Growth Trend - Q1

	Yr2017	Yr2018	Yr2019	Yr2020
Growth%	13%	3%	-8%	-19%

■ Hotel Apartment   ■ Hotel   — Growth%
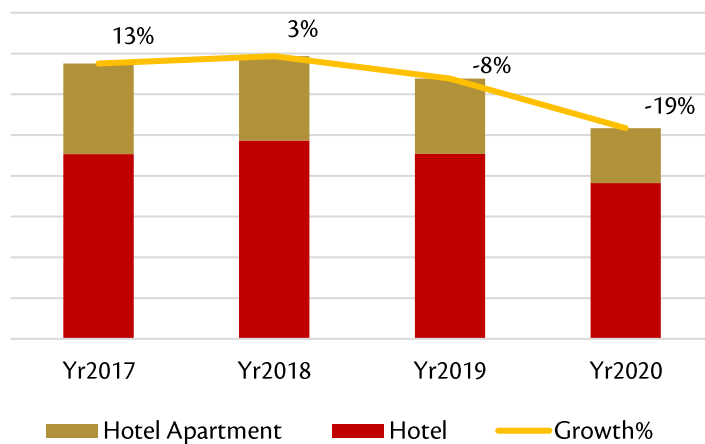
KEY SOURCE MARKETS PERFORMANCE

India	Guest		Growth%		2020 %Share	Guest Night		Growth%	
Month	Yr2019	Yr2020				Yr2019	Yr2020		
January	10,292	12,296	▲	19%	6%	20,317	20,228	▼	0%
February	10,966	12,097	▲	10%	8%	19,886	20,094	▲	1%
March	11,071	8,380	▼	-24%	10%	19,721	16,692	▼	-15%
Q1	32,329	32,773	▲	1%	7%	59,924	57,014	▼	-5%
China	Guest		Growth%		2020 %Share	Guest Night		Growth%	
Month	Yr2019	Yr2020				Yr2019	Yr2020		
January	12,612	7,191	▼	-43%	3%	19,704	10,513	▼	-47%
February	10,207	917	▼	-91%	1%	15,048	1,635	▼	-89%
March	10,470	340	▼	-97%	0.4%	13,986	666	▼	-95%
Q1	33,289	8,448	▼	-75%	2%	48,738	12,814	▼	-74%
Russia	Guest		Growth%		2020 %Share	Guest Night		Growth%	
Month	Yr2019	Yr2020				Yr2019	Yr2020		
January	32,077	47,951	▲	49%	22%	87,133	107,467	▲	23%
February	32,273	35,499	▲	10%	23%	82,467	93,997	▲	14%
March	55,161	28,485	▼	-48%	33%	152,428	74,773	▼	-51%
Q1	119,511	111,935	▼	-6%	24%	322,028	276,237	▼	-14%
CIS	Guest		Growth%		2020 %Share	Guest Night		Growth%	
Month	Yr2019	Yr2020				Yr2019	Yr2020		
January	7,922	9,740	▲	23%	5%	22,891	19,305	▼	-16%
February	7,390	6,731	▼	-9%	4%	19,252	17,306	▼	-10%
March	7,482	3,203	▼	-57%	4%	20,201	8,344	▼	-59%
Q1	22,794	19,674	▼	-14%	4%	62,344	44,955	▼	-28%
GCC	Guest		Growth%		2020 %Share	Guest Night		Growth%	
Month	Yr2019	Yr2020				Yr2019	Yr2020		
January	43,514	46,976	▲	8%	22%	69,388	78,683	▲	13%
February	28,441	18,143	▼	-36%	12%	42,314	27,631	▼	-35%
March	20,909	3,218	▼	-85%	4%	31,357	5,727	▼	-82%
Q1	92,864	68,337	▼	-26%	15%	143,059	112,041	▼	-22%

*All GCC countries excluding UAE

Key source markets growth during Q1 (2019-2020)
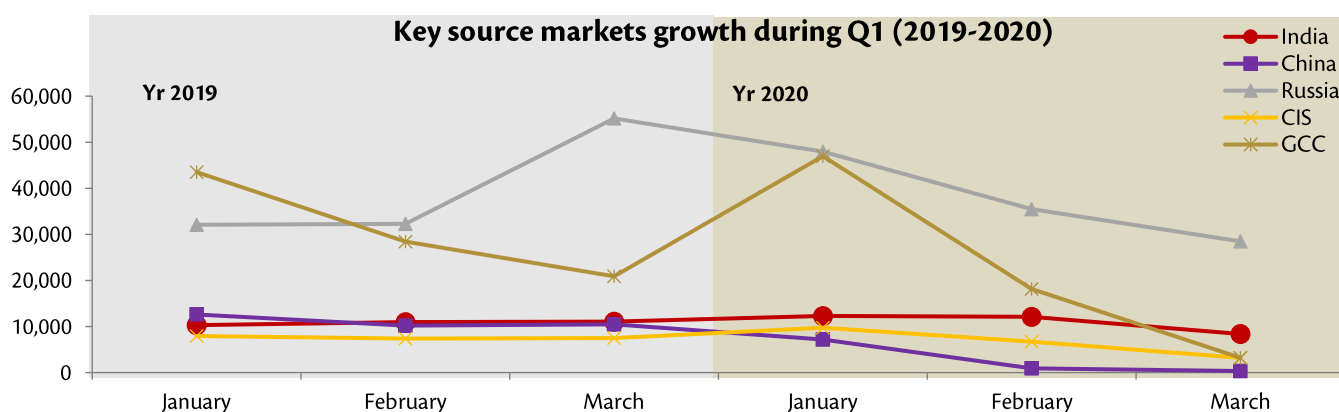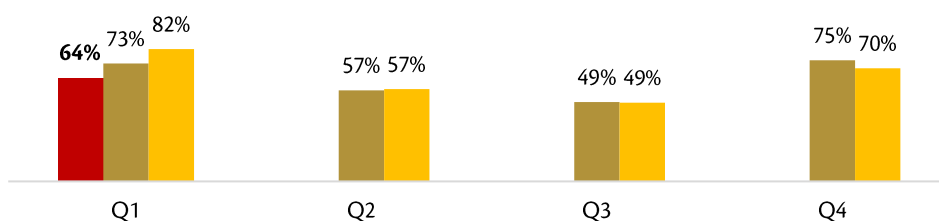
SECTOR PERFORMANCE –
KEY INDICATORS (QUARTERLY)

■ **2020**　■ 2019　■ 2018

Revenue
(AED Million)

	Q1	Q2	Q3	Q4
2020	142			
2019	176	133	89	176
2018	219	141	100	173

Occupancy %

	Q1	Q2	Q3	Q4
2020	64%			
2019	73%	57%	49%	75%
2018	82%	57%	49%	70%

ALOS
(DAYS)

	Q1	Q2	Q3	Q4
2020	1.95			
2019	2.09	2.09	1.91	1.98
2018	2.27	2.24	2.06	2.19

REVPAR
(AED)

	Q1	Q2	Q3	Q4
2020	122			
2019	147	101	74	148
2018	185	113	87	145

ADR
(AED)

	Q1	Q2	Q3	Q4
2020	189			
2019	202	174	151	196
2018	227	192	178	206
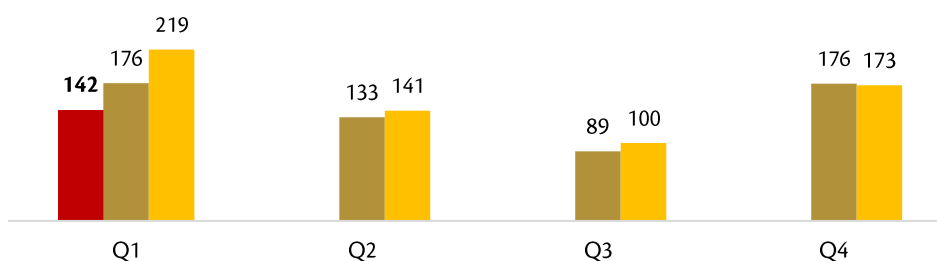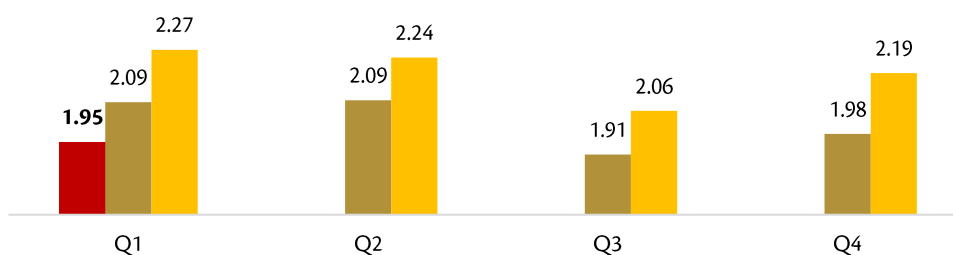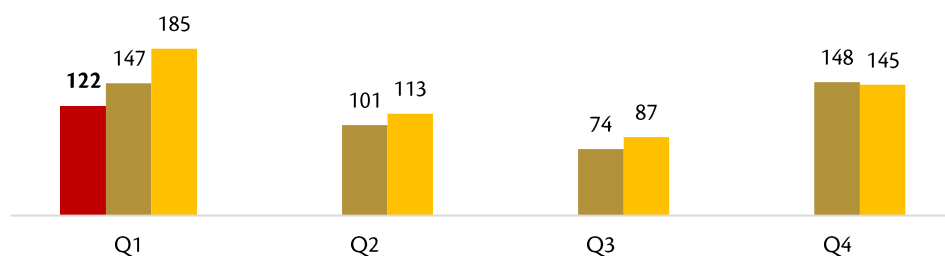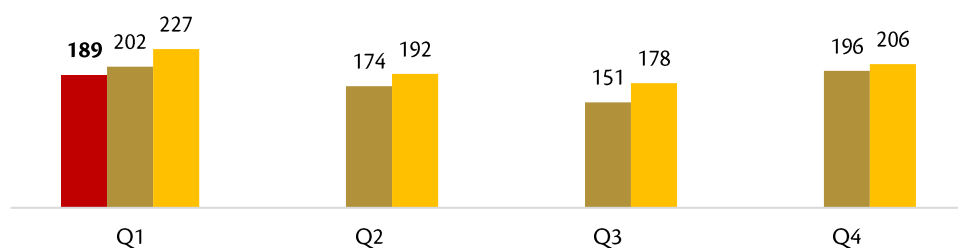
SECTOR PERFORMANCE – KEY INDICATORS (MONTHLY)
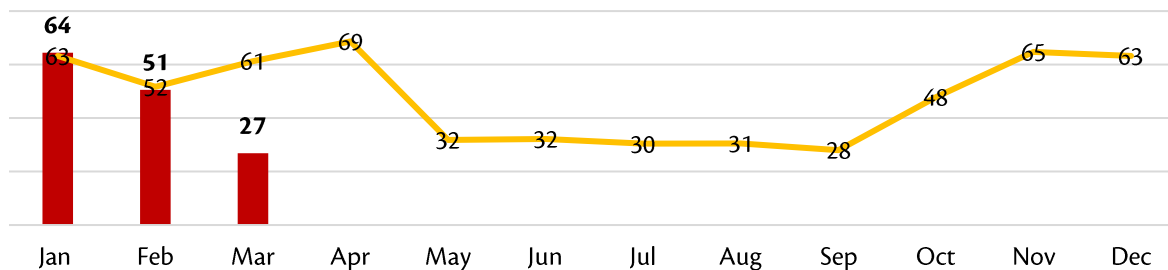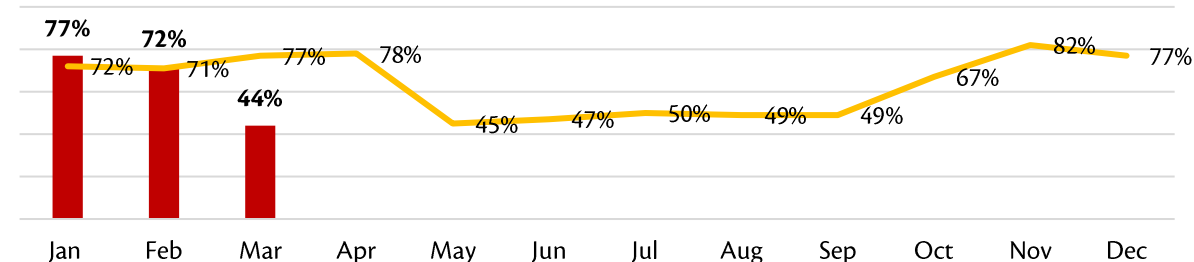
2020 ━━ 2019

Revenue (AED Million)
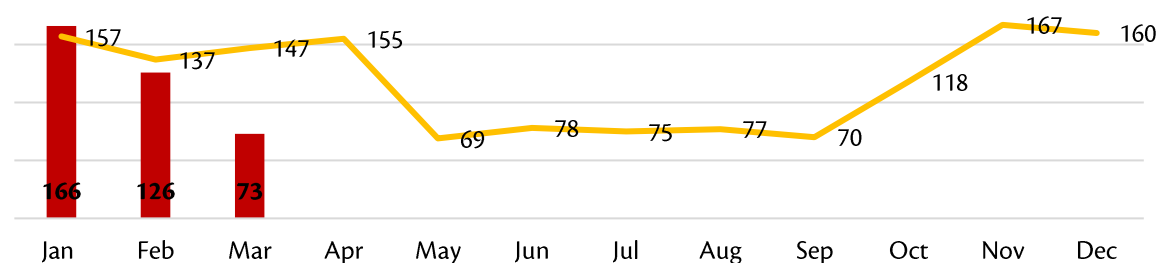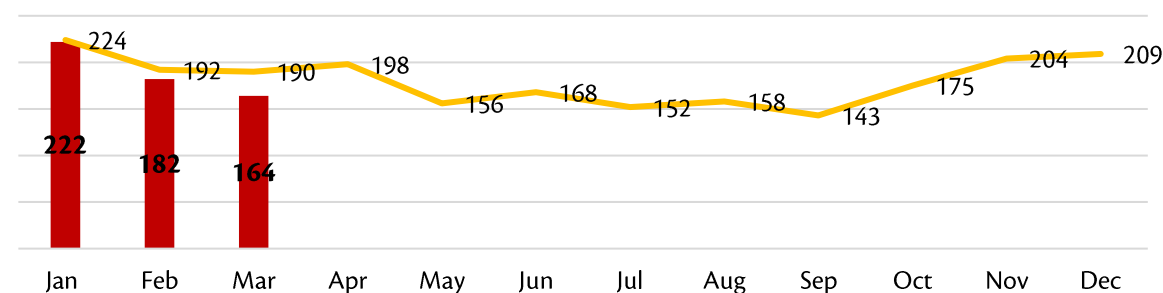
Month	2020	2019
Jan	64	63
Feb	51	52
Mar	27	61
Apr		69
May		32
Jun		32
Jul		30
Aug		31
Sep		28
Oct		48
Nov		65
Dec		63

Occupancy %

Month	2020	2019
Jan	77%	72%
Feb	72%	71%
Mar	44%	77%
Apr		78%
May		45%
Jun		47%
Jul		50%
Aug		49%
Sep		49%
Oct		67%
Nov		82%
Dec		77%

ALOS (DAYS)

Month	2020	2019
Jan	1.75	2.07
Feb	1.87	2.03
Mar	2.23	2.16
Apr		2.19
May		2.18
Jun		1.91
Jul		1.92
Aug		1.81
Sep		1.99
Oct		2.04
Nov		1.97
Dec		1.93

REVPAR (AED)

Month	2020	2019
Jan	166	157
Feb	126	137
Mar	73	147
Apr		155
May		69
Jun		78
Jul		75
Aug		77
Sep		70
Oct		118
Nov		167
Dec		160

ADR (AED)

Month	2020	2019
Jan	222	224
Feb	182	192
Mar	164	190
Apr		198
May		156
Jun		168
Jul		152
Aug		158
Sep		143
Oct		175
Nov		204
Dec		209

Sharjah الشارقة

KEY INDICATORS BY REGION

GROWTH %

	Region	Growth	
📍	Russia, CIS & Baltics	8%	▼
📍	Americas	15%	▼
📍	GCC	26%	▼
📍	Arabs	21%	▼
📍	Europe Ex.Russia, CIS	14%	▼
📍	Asia	26%	▼
📍	Africa	120%	▲
📍	Australia & The Pacific	2%	▲
📍	UAE	45%	▲

SHARE %

29% 1.7% 15% 13%

7% 17% 6% 0.4%

12%
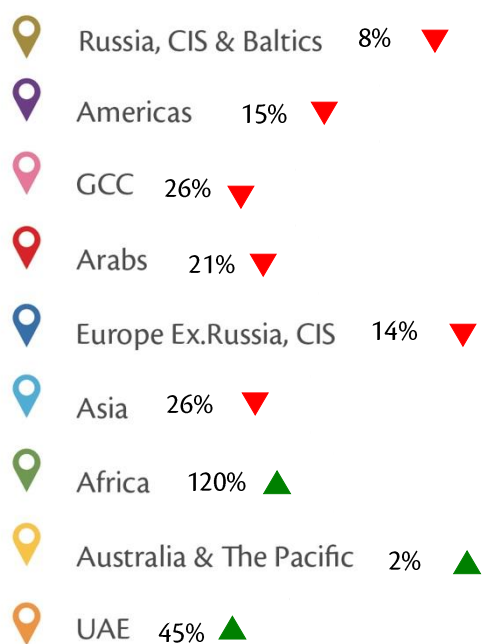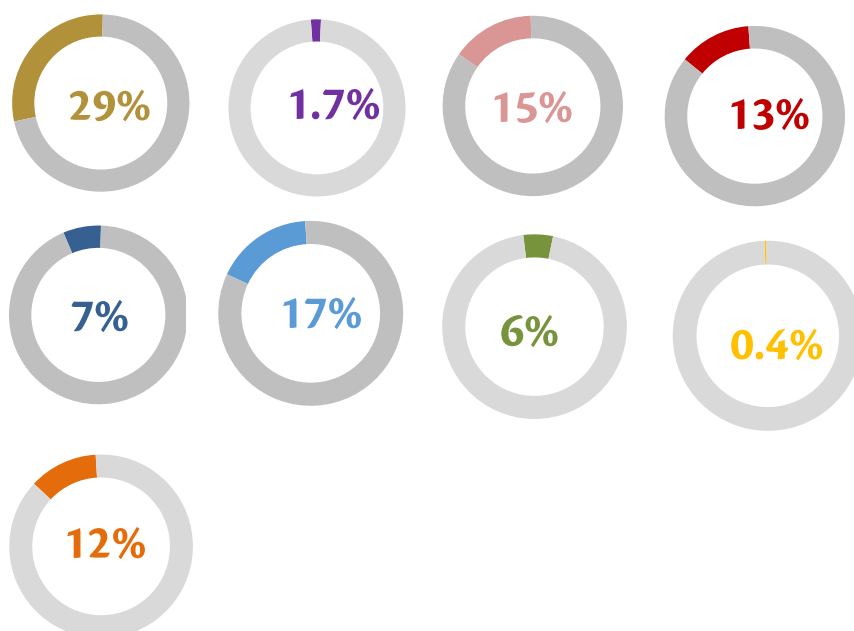
KEY INDICATORS PER HOTEL TYPE

★★★★★ 5-Star						
Number of Hotels: 12	Available Rooms	1,072				
	Occupancy	52%				
	ALOS	1.74				
	RevPAR	205				
	Top 5 Nationalities	**1)**Russia	**2)**UAE	**3)**KSA	**4)**Germany	**5)**India

★★★★ 4-Star						
Number of Hotels: 20	Available Rooms	2,562				
	Occupancy	66%				
	ALOS	1.79				
	RevPAR	135				
	Top 5 Nationalities	**1)**Russia	**2)**UAE	**3)**KSA	**4)**Oman	**5)**China

★★★ 3-Star						
Number of Hotels: 12	Available Rooms	1,594				
	Occupancy	74%				
	ALOS	2.18				
	RevPAR	128				
	Top 5 Nationalities	**1)**Russia	**2)**India	**3)**UAE	**4)**KSA	**5)**Oman

★★ 2-Star						
Number of Hotels: 9	Available Rooms	596				
	Occupancy	58%				
	ALOS	2.59				
	RevPAR	77				
	Top 5 Nationalities	**1)**Oman	**2)**Russia	**3)**Pakistan	**4)**KSA	**5)**India

★ 1-Star						
Number of Hotels: 10	Available Rooms	365				
	Occupancy	58%				
	ALOS	2.72				
	RevPAR	68				
	Top 5 Nationalities	**1)**India	**2)**Pakistan	**3)**Russia	**4)**Oman	5)Philippines

Deluxe						
Number of Hotels: 6	Available Rooms	751				
	Occupancy	41%				
	ALOS	2.20				
	RevPAR	118				
	Top 5 Nationalities	1)UAE	2)KSA	3)Russia	4)Oman	5)Egypt

Standard						
Number of Hotels: 8	Available Rooms	553				
	Occupancy	70%				
	ALOS	1.01				
	RevPAR	182				
	Top 5 Nationalities	1)UAE	2)Russia	3)India	4)KSA	5)Iraq

Basic						
Number of Hotels: 28	Available Rooms	985				
	Occupancy	65%				
	ALOS	3.22				
	RevPAR	93				
	Top 5 Nationalities	1)Oman	2)India	3)Russia	4)KSA	5)Egypt

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.

$$RevPAR = Occupancy\ x\ ADR$$

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