

SHARJAH HOSPITALITY STATISTICS REPORT

Q2 - 2020

Strategy – Research & Statistics Division
July 27, 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 (First Half) 2020.....	11
Glossary.....	13





EXECUTIVE SUMMARY



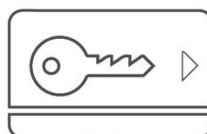
2nd Quarter - 2020

Sharjah Hotel Main Indicators

KEY PERFORMANCE INDICATORS	Guest	Occupancy Rate%	ALOS (days)
	119,698 ▼ 69%	30% ▼ 26%	2.04 ▼ 10%
	Total Revenue	RevPAR	ADR
	AED 33,880,857 ▼ 74.5%	AED 40 ▼ 12%	AED 135 ▼ 22%



**105
HOTEL**



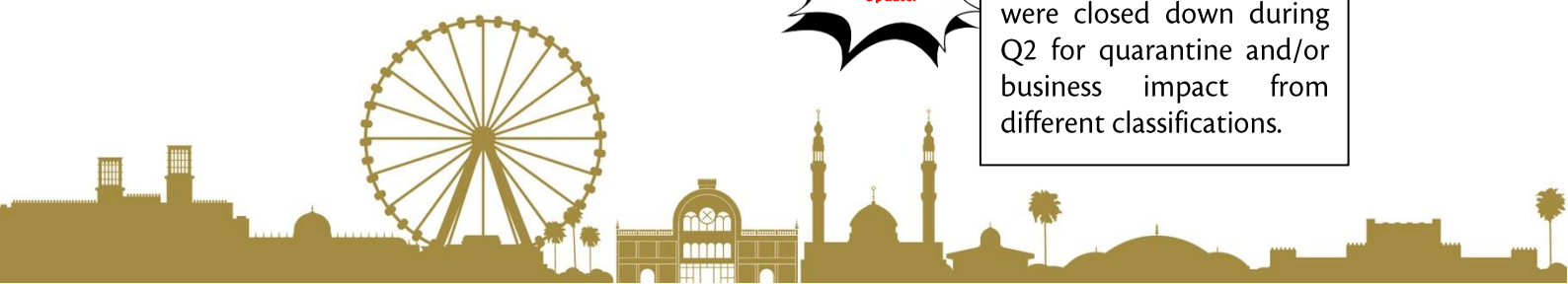
**5,703
ROOMS**

STAR RATING	5 STAR	4 STAR	1 - 3 STAR	APTS
	12	20	31	42
	376	962	2,284	2,081

COVID-19
Update:

COVID-19 Update:

Around 24 establishments were closed down during Q2 for quarantine and/or business impact from different classifications.



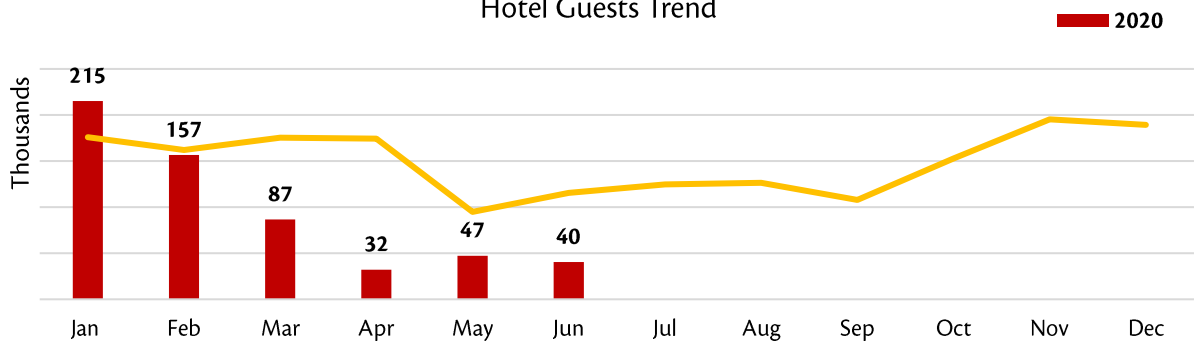


HOSPITALITY SECTOR PERFORMANCE

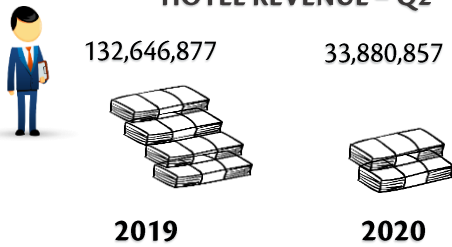
Top 5 Nationalities
(Hotel Establishments Guests)



Hotel Guests Trend

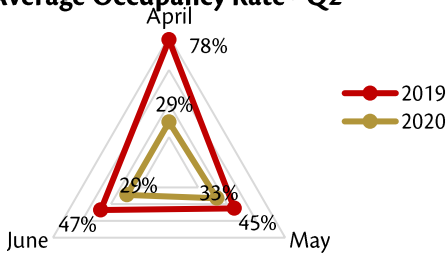


HOTEL REVENUE - Q2



COVID-19 Update:
The huge drops in guest arrivals at Sharjah Hotels during Q2 synchronized with the increasing confirmed cases during the same period and the complete lock-down in UAE

Average Occupancy Rate - Q2

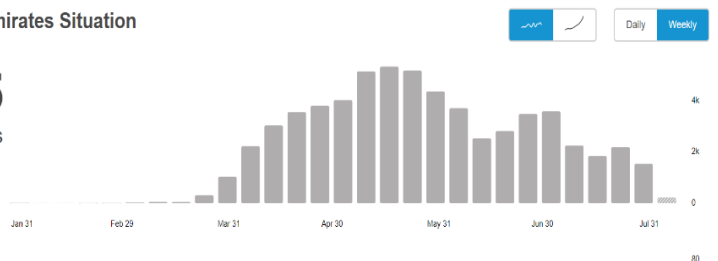


Global > United Arab Emirates

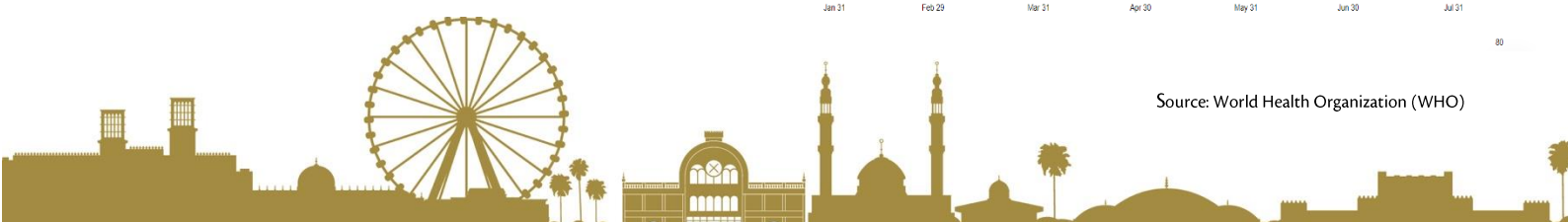
Back to top

United Arab Emirates Situation

62,525
confirmed cases

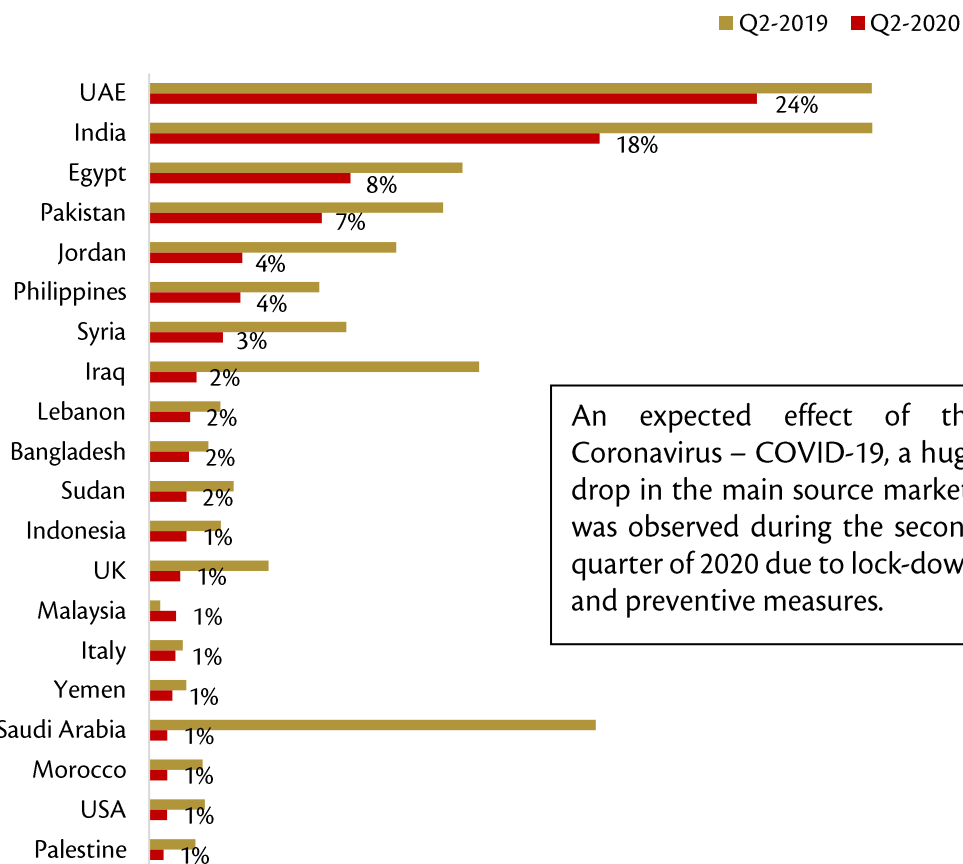


Source: World Health Organization (WHO)



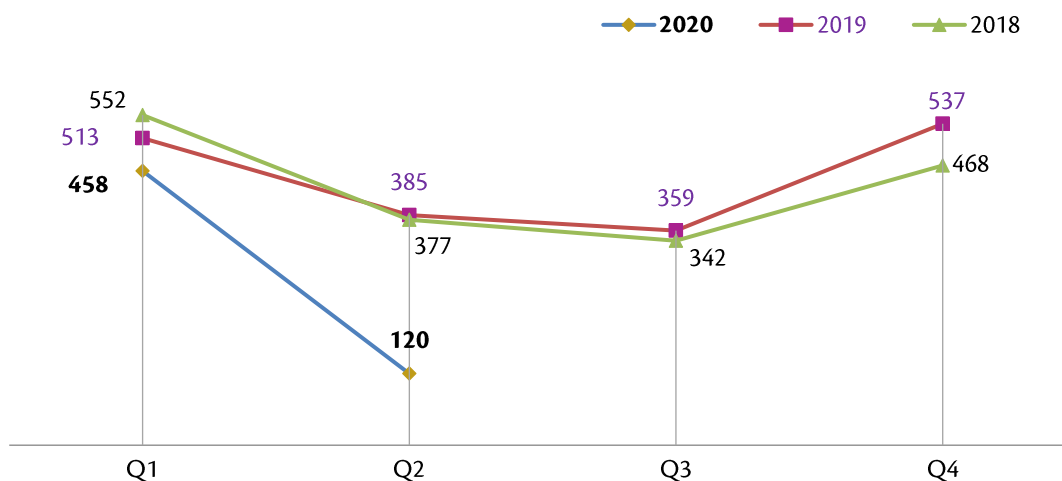
Top 20 Hotel Guests by Nationality & Market Share

ALOS Days	Nights Number	Growth %
0.99	28,838	-16%
2.63	56,770	-38%
2.58	24,914	-36%
2.24	18,557	-41%
2.08	9,308	-62%
2.37	10,370	-46%
2.41	8,537	-63%
2.53	5,750	-86%
1.69	3,327	-42%
3.06	5,851	-33%
1.97	3,538	-56%
0.88	1,585	-48%
1.70	2,544	-74%
0.69	889	141%
1.39	1,760	-22%
3.59	4,008	-38%
1.45	1,259	-96%
4.43	3,847	-66%
1.10	953	-68%
3.27	2,270	-69%



An expected effect of the Coronavirus – COVID-19, a huge drop in the main source markets was observed during the second quarter of 2020 due to lock-down and preventive measures.

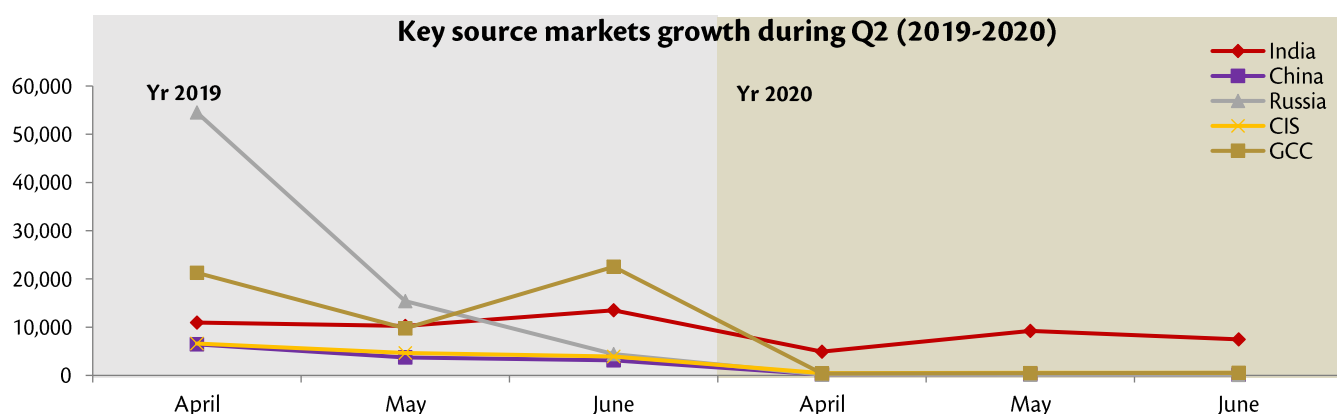
Evolution in the number of Hotels Guest (000)



KEY SOURCE MARKETS PERFORMANCE

India	Guest		Growth%		2020 %Share	Guest Night		Growth%	
	Yr2019	Yr2020				Yr2019	Yr2020		
April	10,951	4,928	▼	-55%	15%	20,849	14,847	▼	-29%
May	10,243	9,226	▼	-10%	20%	20,383	23,639	▲	16%
June	13,502	7,464	▼	-45%	18%	23,975	18,284	▼	-24%
Q2	34,696	21,618	▼	-38%	18%	65,207	56,770	▼	-13%
China	Guest		Growth%		2020 %Share	Guest Night		Growth%	
	Yr2019	Yr2020				Yr2019	Yr2020		
April	6,434	168	▼	-97%	0.5%	8,780	356	▼	-96%
May	3,721	241	▼	-94%	0.5%	6,009	372	▼	-94%
June	3,134	146	▼	-95%	0.4%	4,751	179	▼	-96%
Q2	13,289	555	▼	-96%	0.5%	19,540	907	▼	-95%
Russia	Guest		Growth%		2020 %Share	Guest Night		Growth%	
	Yr2019	Yr2020				Yr2019	Yr2020		
April	54,505	148	▼	-100%	0.5%	161,510	645	▼	-100%
May	15,418	146	▼	-99%	0.3%	49,725	438	▼	-99%
June	4,416	97	▼	-98%	0.2%	13,505	383	▼	-97%
Q2	74,339	391	▼	-99%	0.3%	224,740	1,466	▼	-99%
CIS	Guest		Growth%		2020 %Share	Guest Night		Growth%	
	Yr2019	Yr2020				Yr2019	Yr2020		
April	6,612	472	▼	-93%	1.5%	16,875	1,458	▼	-91%
May	4,649	536	▼	-88%	1.1%	13,228	1,191	▼	-91%
June	3,915	536	▼	-86%	1.3%	12,063	1,351	▼	-89%
Q2	15,176	1,544	▼	-90%	1.3%	42,166	4,000	▼	-91%
GCC	Guest		Growth%		2020 %Share	Guest Night		Growth%	
	Yr2019	Yr2020				Yr2019	Yr2020		
April	21,281	388	▼	-98%	1.2%	31,551	1,226	▼	-96%
May	9,769	476	▼	-95%	1.0%	14,626	1,029	▼	-93%
June	22,521	526	▼	-98%	1.3%	37,300	1,078	▼	-97%
Q2	53,571	1,390	▼	-97%	1.2%	83,477	3,333	▼	-96%

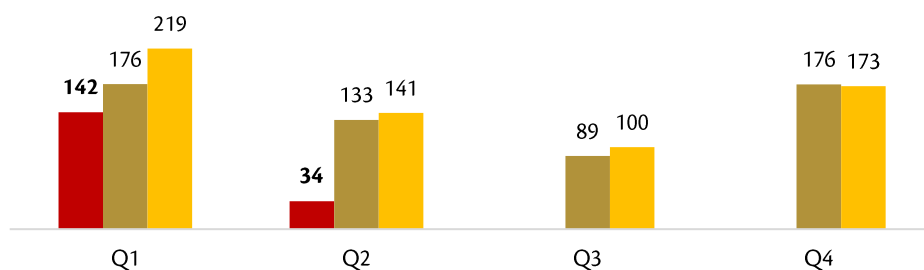
*All GCC countries excluding UAE



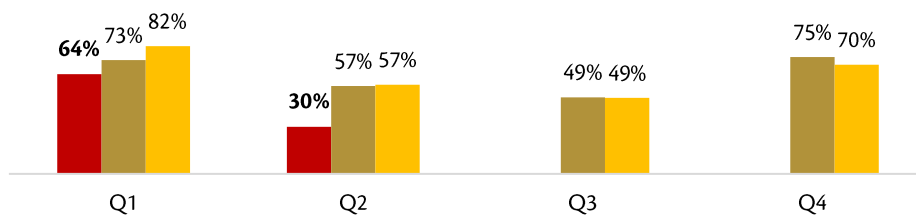
SECTOR PERFORMANCE – KEY INDICATORS (QUARTERLY)

■ 2020 ■ 2019 ■ 2018

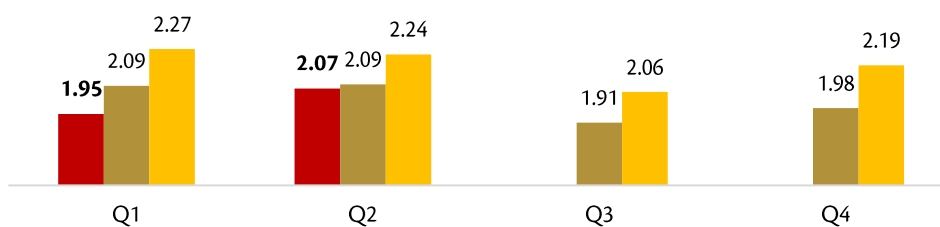
Revenue
(AED Million)



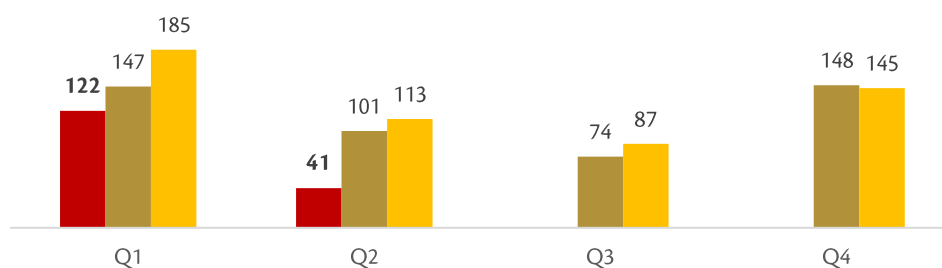
Occupancy %



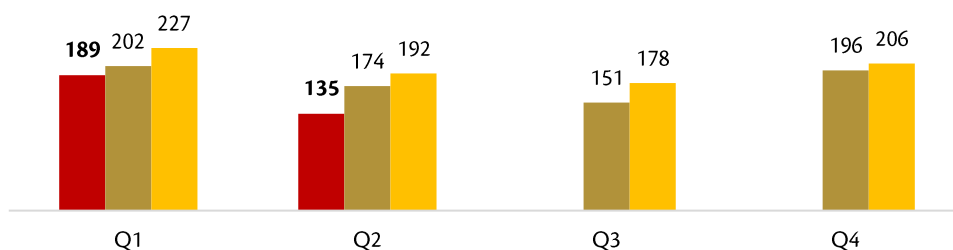
ALOS
(DAYS)



REVPAR
(AED)



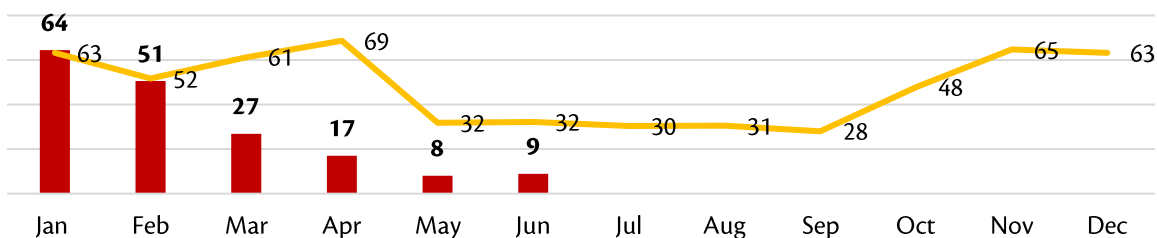
ADR
(AED)



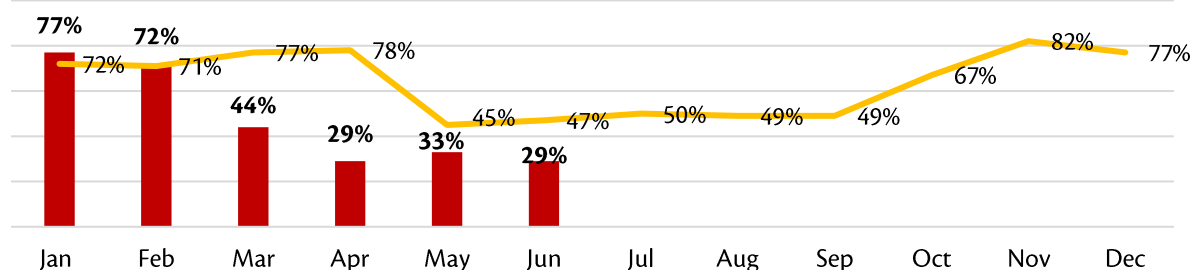
SECTOR PERFORMANCE – KEY INDICATORS (MONTHLY)

2020 2019

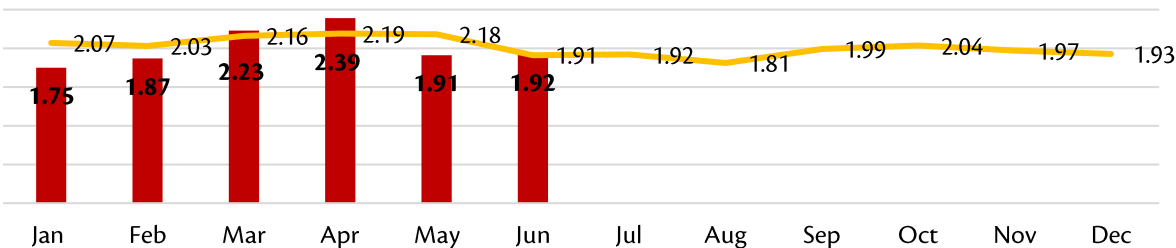
Revenue
(AED Million)



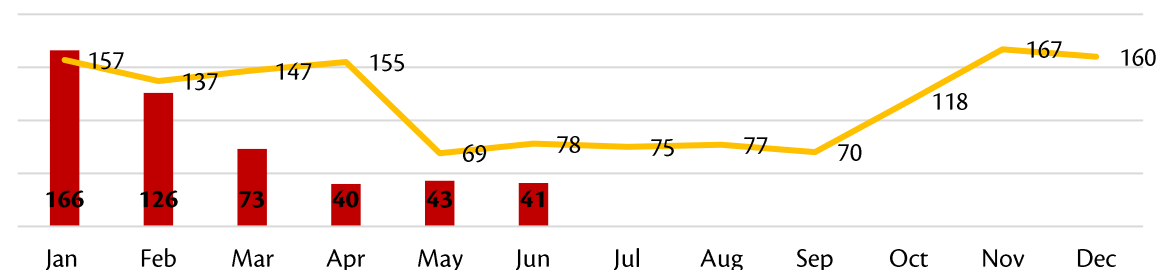
Occupancy %



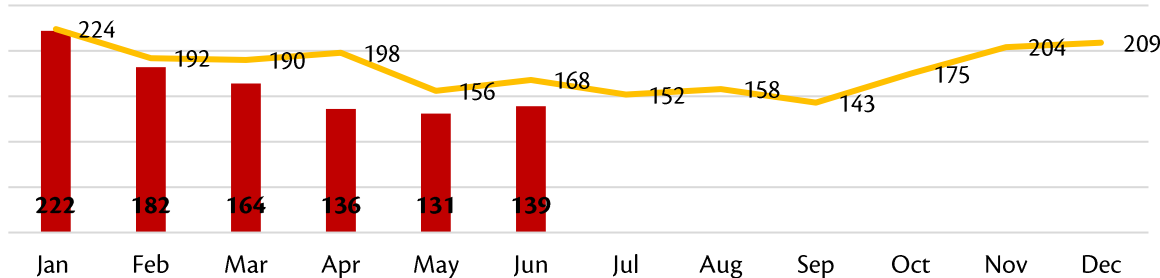
ALOS
(DAYS)



REVPAR
(AED)



ADR
(AED)














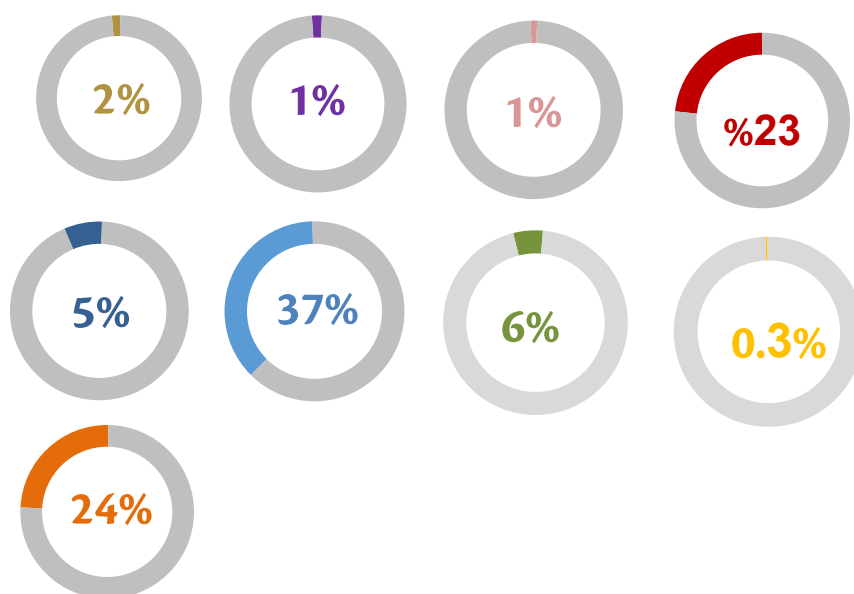
KEY INDICATORS BY REGION



GROWTH %

	Russia, CIS & Baltics	98%	▼
	Americas	78%	▼
	GCC	97%	▼
	Arabs	61%	▼
	Europe Ex. Russia, CIS	76%	▼
	Asia	50%	▼
	Africa	41%	▼
	Australia & The Pacific	78%	▼
	UAE	16%	▼

SHARE %





KEY INDICATORS PER HOTEL TYPE



★★★★★ 5-Star	Available Rooms	376					
	Occupancy	10%					
Number of Hotels:	ALOS	1.40					
12	RevPAR	42					
	Top 5 Nationalities	1) UAE	2) Lebanon	3) UK	4) Jordan	5) Egypt	
★★★★★ 4-Star	Available Rooms	962					
	Occupancy	29%					
Number of Hotels:	ALOS	2.56					
20	RevPAR	27					
	Top 5 Nationalities	1) UAE	2) India	3) Egypt	4) Pakistan	5) Syria	
★★★ 3-Star	Available Rooms	1,378					
	Occupancy	34%					
Number of Hotels:	ALOS	1.56					
12	RevPAR	37					
	Top 5 Nationalities	1) UAE	2) Pakistan	3) Philippines	4) Egypt	5) Indonesia	
★★ 2-Star	Available Rooms	596					
	Occupancy	32%					
Number of Hotels:	ALOS	5.90					
9	RevPAR	27					
	Top 5 Nationalities	1) India	2) Pakistan	3) UAE	4) Egypt	5) Bangladesh	
★ 1-Star	Available Rooms	310					
	Occupancy	27%					
Number of Hotels:	ALOS	3.09					
10	RevPAR	25					
	Top 5 Nationalities	1) India	2) Pakistan	3) Bangladesh	4) Philippines	5) Egypt	
Deluxe	Available Rooms	547					
	Occupancy	21%					
Number of Hotels:	ALOS	2.76					
6	RevPAR	54					
	Top 5 Nationalities	1) Egypt	2) India	3) Philippines	4) Pakistan	5) Syria	
Standard	Available Rooms	596					
	Occupancy	39%					
Number of Hotels:	ALOS	0.84					
8	RevPAR	74					
	Top 5 Nationalities	1) UAE	2) India	3) Jordan	4) Egypt	5) Italy	
Basic	Available Rooms	938					
	Occupancy	38%					
Number of Hotels:	ALOS	4.07					
28	RevPAR	38					
	Top 5 Nationalities	1) India	2) Egypt	3) Pakistan	4) Syria	5) Jordan	





EXECUTIVE Year to Date
SUMMARY (Q1 – Q2) 2020



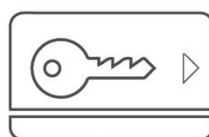
Jan to Jun - 2020

Sharjah Hotel Guests

Guest	Occupancy Rate%	ALOS (days)
578 K ▼ 36%	47% ▼ 18%	1.91 ▼ 9%
Total Revenue	RevPAR	ADR
AED 176 M ▼ 43%	AED 93 ▼ 26%	AED 162 ▼ 14%



105
HOTEL



9,177
ROOMS

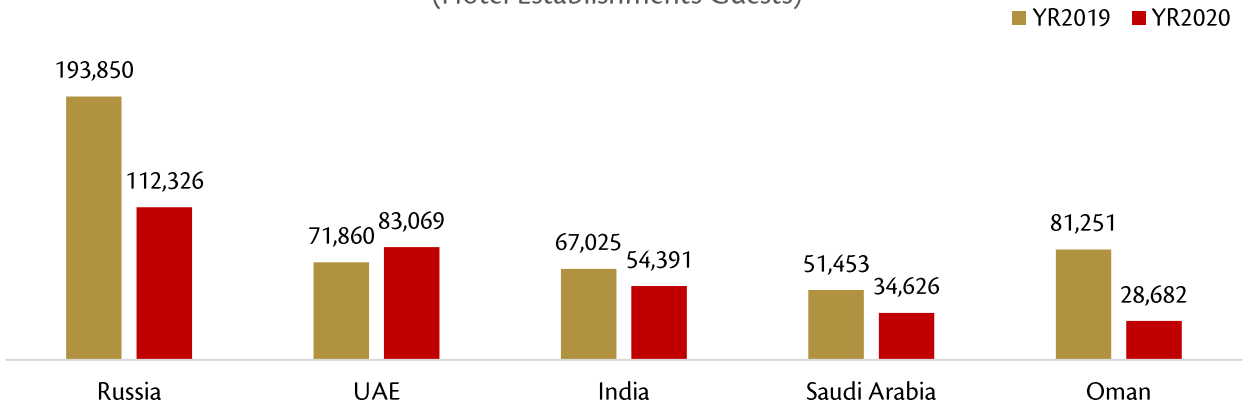
STAR RATING	5 STAR	4 STAR	1 - 3 STAR	APTS
	12	21	31	42
	376	962	2,284	2,081



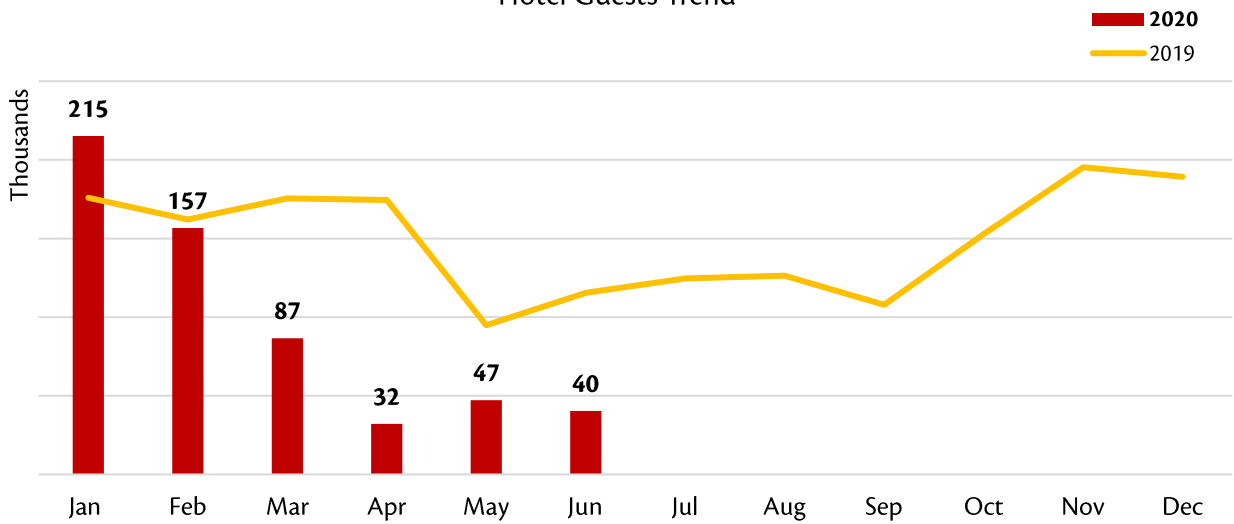


HOSPITALITY SECTOR PERFORMANCE

Top 5 Nationalities
(Hotel Establishments Guests)



Hotel Guests Trend





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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