

# SHARJAH HOSPITALITY STATISTICS REPORT

## Q3 - 2019

Strategy – Research & Statistics Division  
October 29, 2019





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## EXECUTIVE SUMMARY



3<sup>rd</sup> Quarter - 2019

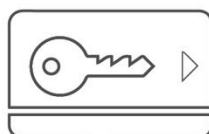
Sharjah Hotel Main Indicators

### KEY PERFORMANCE INDICATORS

Guest	Occupancy Rate%	ALOS (days)
358,800 ▲ 5%	49% ► 0%	1.90 ▼ 7%
Total Revenue	RevPAR	ADR
AED 88,923,118 ▼ 11%	AED 76 ▼ 8%	AED 151 ▼ 11%



107  
HOTEL



9,556  
ROOMS

### STAR RATING

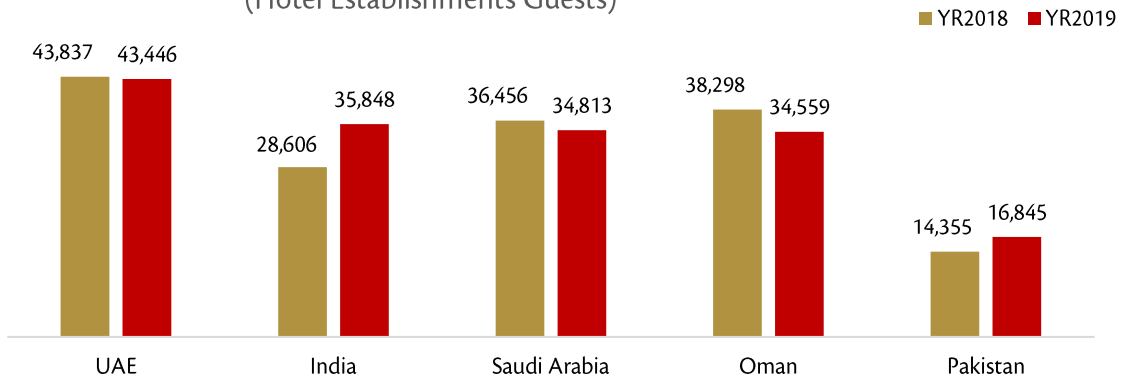
5 STAR	4 STAR	1 - 3 STAR	APTS
9	21	33	44
1,323	2,893	2,719	2,622



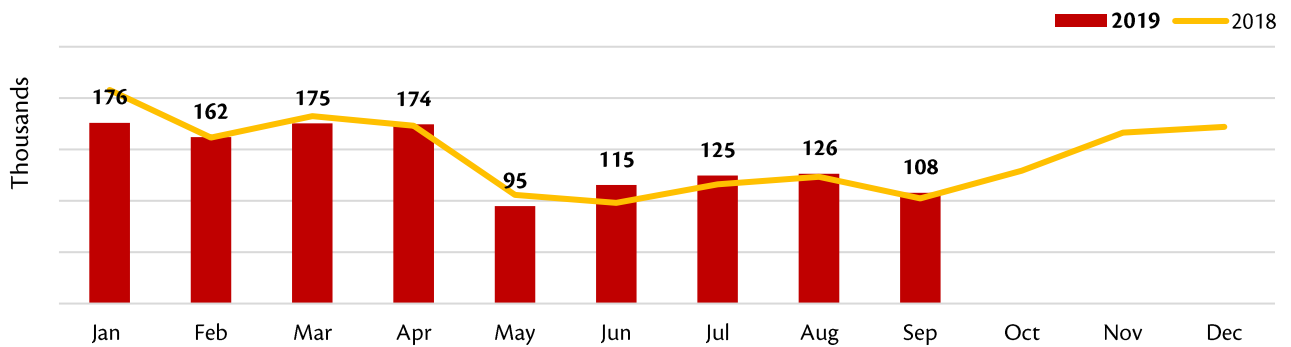


## HOSPITALITY SECTOR PERFORMANCE

Top 5 Nationalities  
(Hotel Establishments Guests)

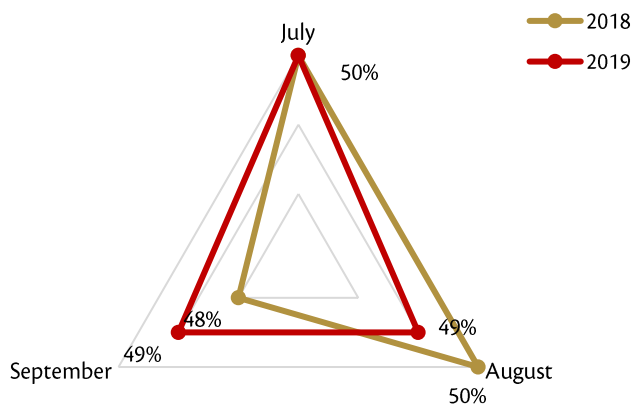
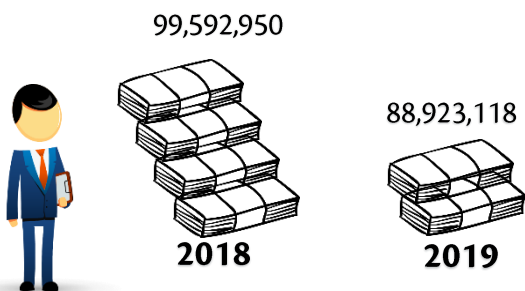


Hotel Guest Trend



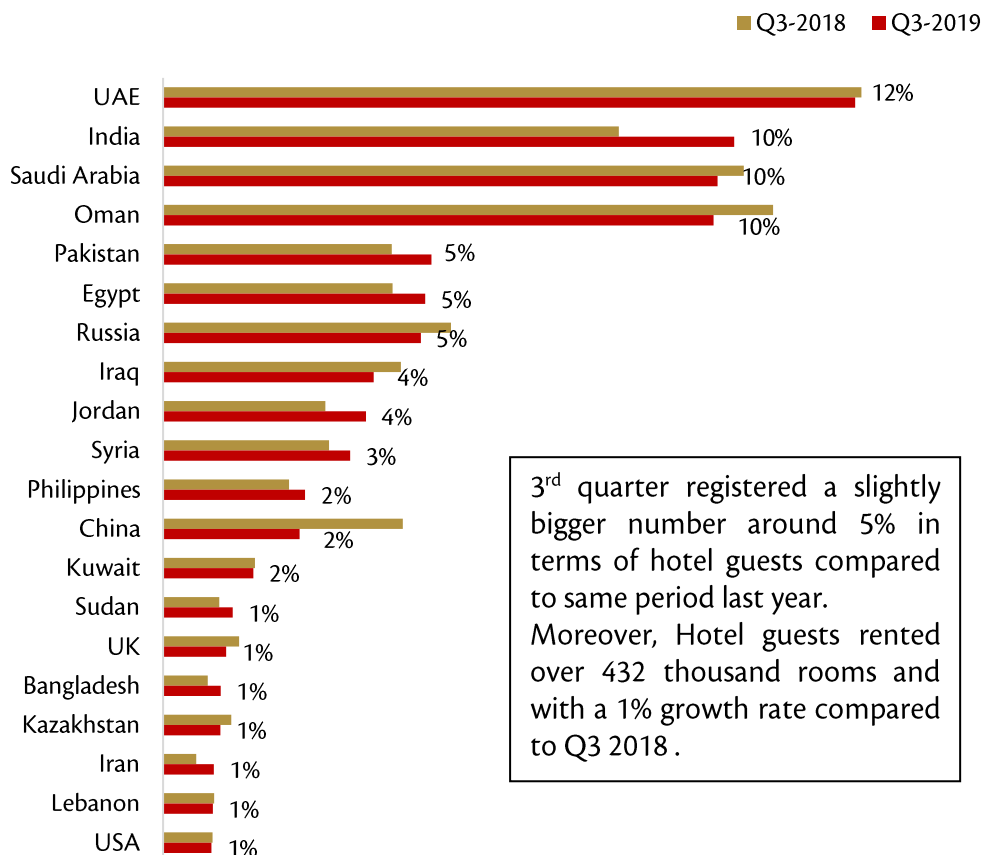
Average Occupancy Rate - Q3

HOTEL REVENUE – Q3



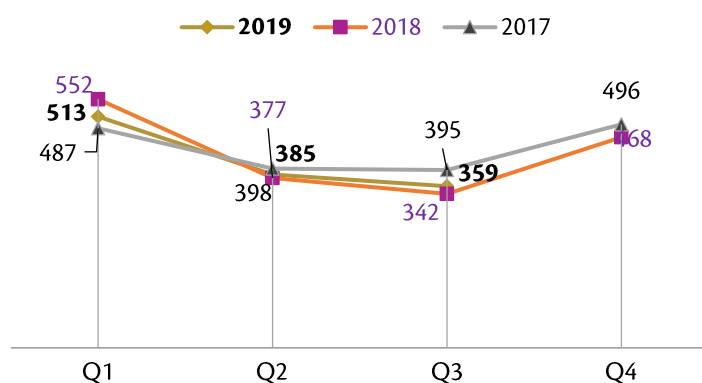
## Top 20 Hotel Guests by Nationality & Market Share

ALOS Days	Nights Number	Growth %
1.56	67,589	-1%
1.80	64,564	25%
1.69	58,758	-5%
1.39	47,907	-10%
1.72	28,983	17%
2.81	46,323	14%
2.85	46,101	-10%
2.86	37,779	-11%
2.06	26,232	25%
1.95	22,930	13%
1.70	15,186	13%
1.60	13,672	-43%
1.99	11,281	-2%
2.85	12,468	24%
2.16	8,550	-17%
1.53	5,532	29%
3.48	12,491	-16%
2.34	7,456	53%
1.96	6,122	-3%
1.77	5,386	-2%

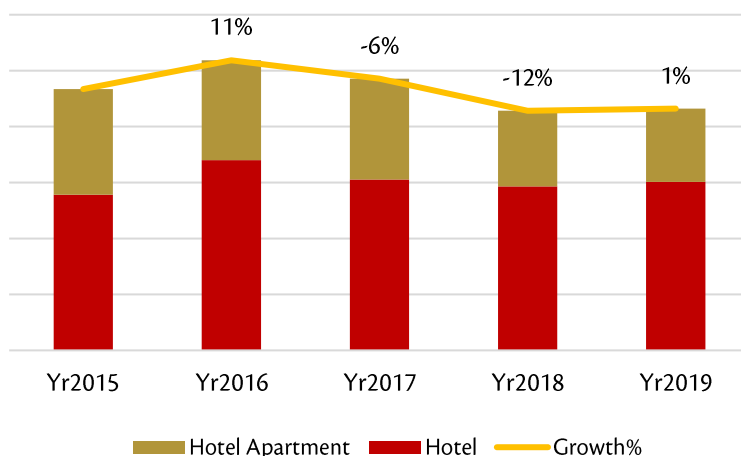


3<sup>rd</sup> quarter registered a slightly bigger number around 5% in terms of hotel guests compared to same period last year. Moreover, Hotel guests rented over 432 thousand rooms and with a 1% growth rate compared to Q3 2018.

## Evolution in the number of Hotels Guest (000)



## Hotel Establishments Room Demand Growth Trend - Q3

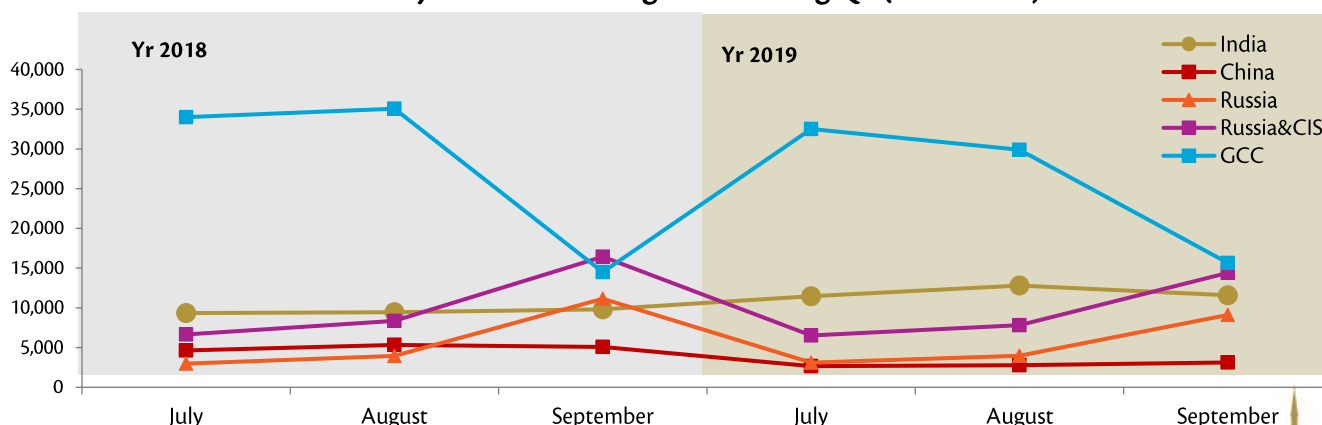


## KEY SOURCE MARKETS PERFORMANCE

India	Guest		Growth%		2019 %Share	Guest Night		Growth%	
Month	Yr2018	Yr2019				Yr2018	Yr2019		
July	9,343	11,462	▲	23%	9%	19,299	20,136	▲	4%
August	9,455	12,805	▲	35%	10%	18,872	21,854	▲	16%
September	9,808	11,581	▲	18%	11%	18,933	22,574	▲	19%
Q3	28,606	35,848	▲	25%	10%	57,104	64,564	▲	13%
China	Guest		Growth%		2019 %Share	Guest Night		Growth%	
Month	Yr2018	Yr2019				Yr2018	Yr2019		
July	4,642	2,661	▼	-43%	2%	8,067	4,385	▼	-46%
August	5,334	2,782	▼	-48%	2%	8,963	4,314	▼	-52%
September	5,073	3,127	▼	-38%	3%	8,509	4,973	▼	-42%
Q3	15,049	8,570	▼	-43%	2%	25,539	13,672	▼	-46%
Russia	Guest		Growth%		2019 %Share	Guest Night		Growth%	
Month	Yr2018	Yr2019				Yr2018	Yr2019		
July	2,978	3,110	▲	4%	2%	9,601	9,433	▼	-2%
August	3,950	3,968	▲	0%	3%	13,218	12,128	▼	-8%
September	11,148	9,106	▼	-18%	8%	36,361	24,540	▼	-33%
Q3	18,076	16,184	▼	-10%	5%	59,180	46,101	▼	-22%
Russia&CIS	Guest		Growth%		2019 %Share	Guest Night		Growth%	
Month	Yr2018	Yr2019				Yr2018	Yr2019		
July	6,643	6,523	▼	-2%	5%	23,375	19,343	▼	-17%
August	8,370	7,823	▼	-7%	6%	27,834	23,130	▼	-17%
September	16,437	14,412	▼	-12%	13%	53,358	39,370	▼	-26%
Q3	31,450	28,758	▼	-9%	8%	104,567	81,843	▼	-22%
*GCC	Guest		Growth%		2019 %Share	Guest Night		Growth%	
Month	Yr2018	Yr2019				Yr2018	Yr2019		
July	33,999	32,512	▼	-4%	26%	55,076	51,069	▼	-7%
August	35,063	29,894	▼	-15%	24%	58,153	47,134	▼	-19%
September	14,499	15,652	▲	8%	15%	22,758	25,202	▲	11%
Q3	83,561	78,058	▼	-7%	22%	135,987	123,405	▼	-9%

\*All GCC countries excluding UAE

### Key source markets growth during Q3 (2018-2019)

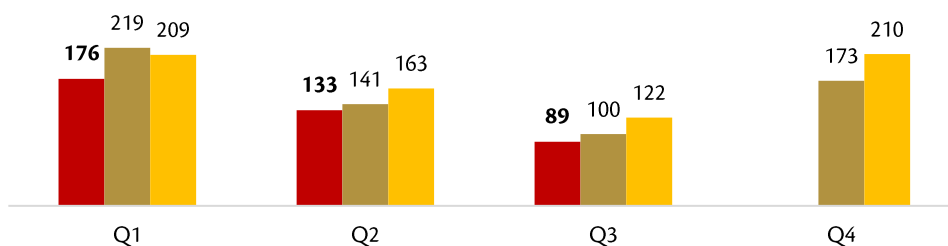




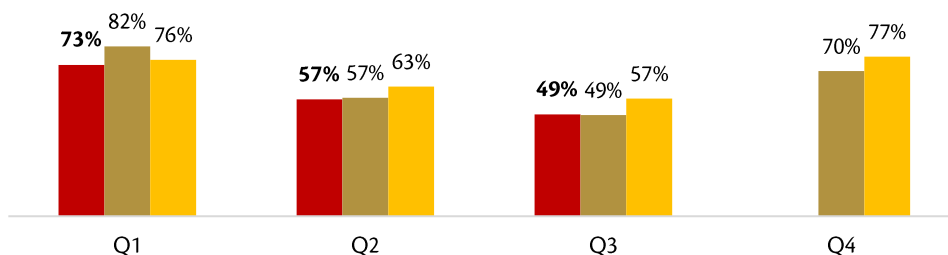
## SECTOR PERFORMANCE – KEY INDICATORS (QUARTERLY)

■ 2019 ■ 2018 ■ 2017

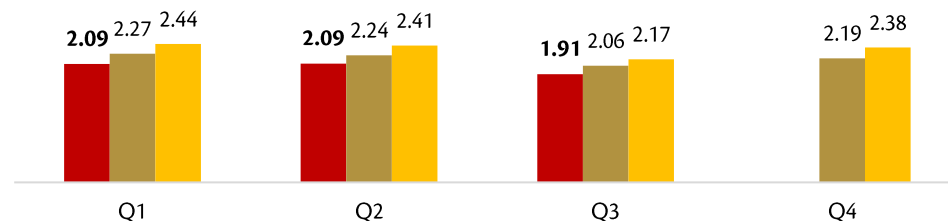
### Revenue (AED Million)



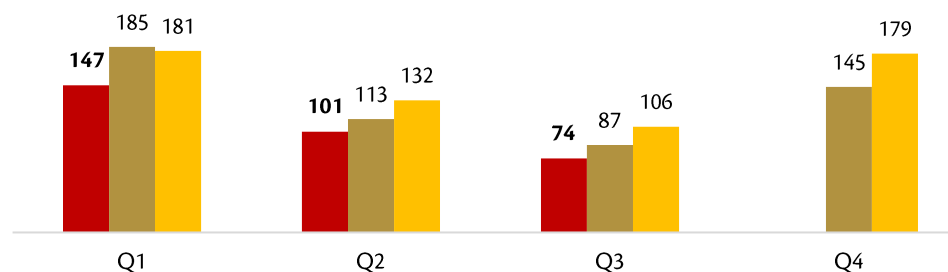
### Occupancy %



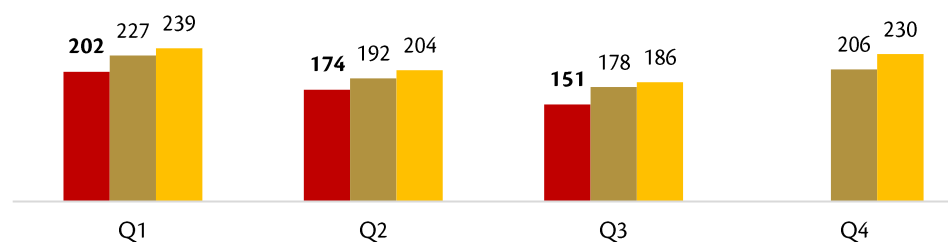
### ALOS (DAYS)



### REVPAR (AED)



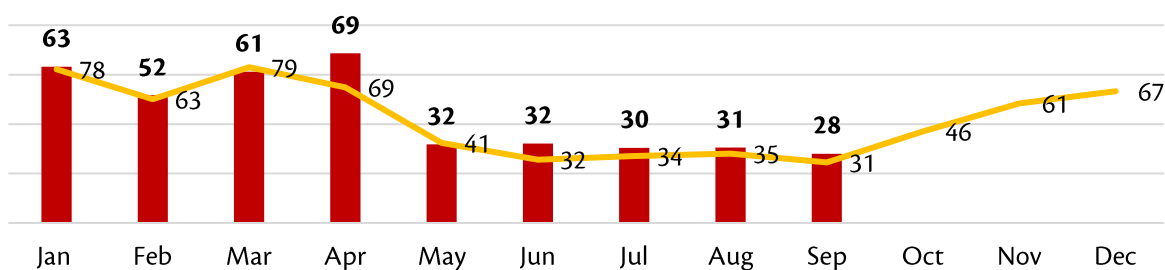
### ADR (AED)



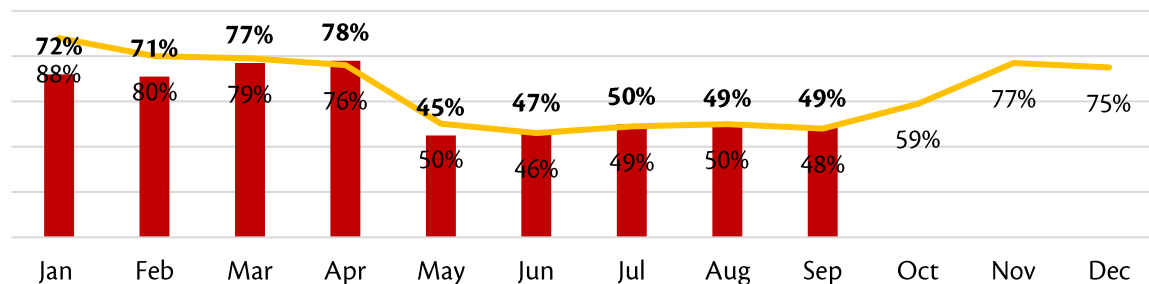
## SECTOR PERFORMANCE – KEY INDICATORS (MONTHLY)

■ 2019 — 2018

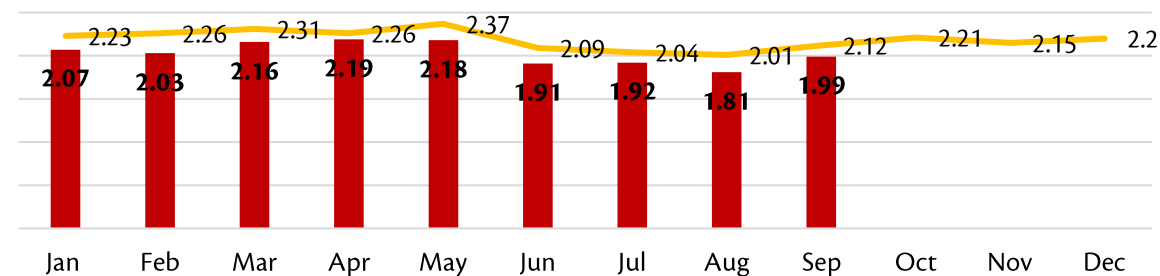
**Revenue**  
(AED Million)



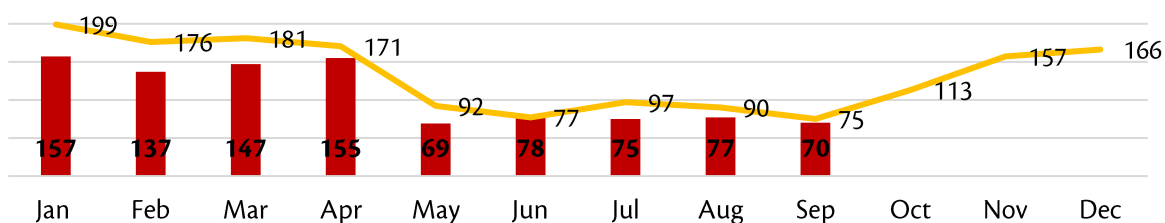
**Occupancy %**



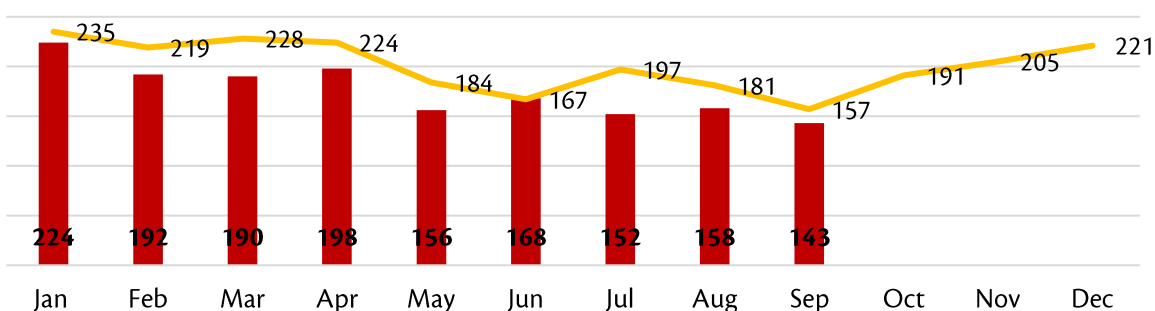
**ALOS**  
(DAYS)



**REVPAR**  
(AED)



**ADR**  
(AED)



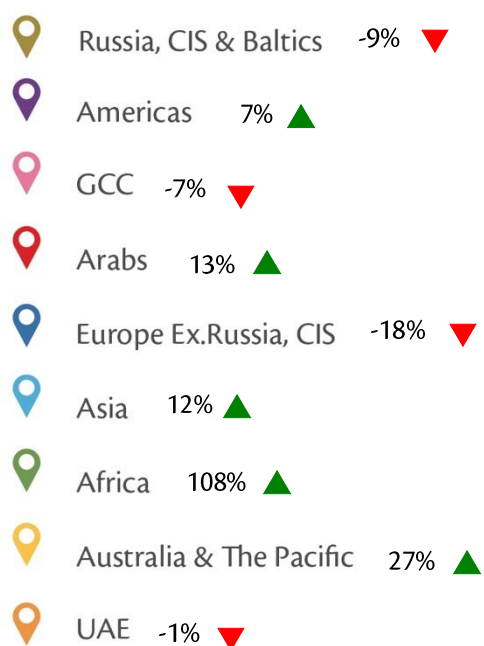




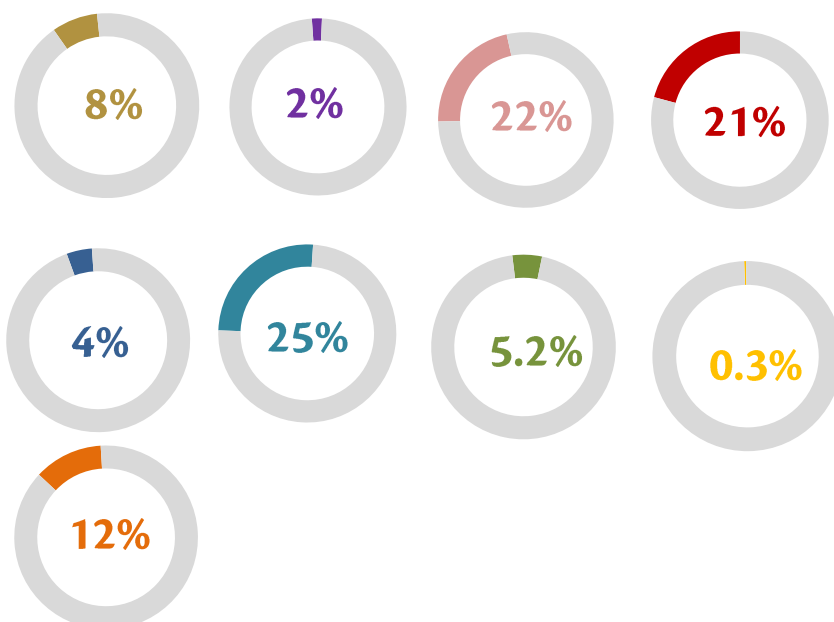
## KEY INDICATORS BY REGION



### GROWTH %



### SHARE %





## KEY INDICATORS PER HOTEL TYPE



★★★★★ <b>5-Star</b> Number of Hotels: 9	Available Rooms Occupancy ALOS RevPAR Top 5 Nationalities	1,323 41% 1.86 99 1)UAE 2)China 3)KSA 4)India 5)Russia
★★★★ <b>4-Star</b> Number of Hotels: 21	Available Rooms Occupancy ALOS RevPAR Top 5 Nationalities	2,893 44% 1.71 65 1)UAE 2)Oman 3)KSA 4)Russia 5)India
★★★ <b>3-Star</b> Number of Hotels: 12	Available Rooms Occupancy ALOS RevPAR Top 5 Nationalities	1,637 58% 1.94 81 1)India 2)UAE 3)KSA 4)Oman 5)Pakistan
★★ <b>2-Star</b> Number of Hotels: 10	Available Rooms Occupancy ALOS RevPAR Top 5 Nationalities	698 48% 1.80 50 1)Oman 2)KSA 3)India 4)Pakistan 5)UAE
★ <b>1-Star</b> Number of Hotels: 11	Available Rooms Occupancy ALOS RevPAR Top 5 Nationalities	384 45% 2.39 48 1)Pakistan 2)India 3)Oman 4)Bangladesh 5)Philippines
<b>Deluxe</b> Number of Hotels: 6	Available Rooms Occupancy ALOS RevPAR Top 5 Nationalities	706 43% 2.36 87 1)KSA 2)UAE 3)Oman 4)India 5)Pakistan
<b>Standard</b> Number of Hotels: 7	Available Rooms Occupancy ALOS RevPAR Top 5 Nationalities	731 61% 1.53 108 1)UAE 2)India 3)KSA 4)Iraq 5)Oman
<b>Basic</b> Number of Hotels: 31	Available Rooms Occupancy ALOS RevPAR Top 5 Nationalities	1,185 57% 2.80 65 1)India 2)Oman 3)Pakistan 4)Jordan 5)Egypt





## EXECUTIVE Year To Date SUMMARY (Q1 – Q3) 2019

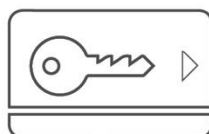


### Jan to Sept - 2019 Sharjah Hotel Guests

Guest	Occupancy Rate%	ALOS (days)
1,257 K ▼ 1%	60% ▼ 3%	2.04 ▼ 7%
Total Revenue	RevPAR	ADR
AED 398 M ▼ 14%	AED 112 ▼ 16%	AED 176 ▼ 14%



**107  
HOTEL**



**9,685  
ROOMS**

#### STAR RATING

5 STAR	4 STAR	1 - 3 STAR	APTS
9	20	33	45
1,313	2,838	2,764	2,742





## 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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