

SHARJAH HOSPITALITY STATISTICS REPORT

Q4 - 2019

Strategy – Research & Statistics Division
January 20, 2019





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 (Q1 – Q4) 2019:	11
Glossary.....	12





EXECUTIVE SUMMARY



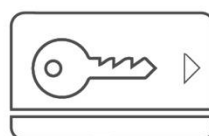
4th Quarter - 2019

Sharjah Hotel Main Indicators

KEY PERFORMANCE INDICATORS	Guest	Occupancy Rate%	ALOS (days)
	537,362 ▲ 15%	75% ▲ 5%	1.97 ▼ 10%
	Total Revenue	RevPAR	ADR
	AED 175,711,490 ▲ 1.3%	AED 151 ▲ 5%	AED 196 ▼ 5%



**101
HOTEL**



**9,177
ROOMS**

STAR RATING	5 STAR	4 STAR	1 - 3 STAR	APTS
	9	21	31	40
	1,331	2,733	2,628	2,485

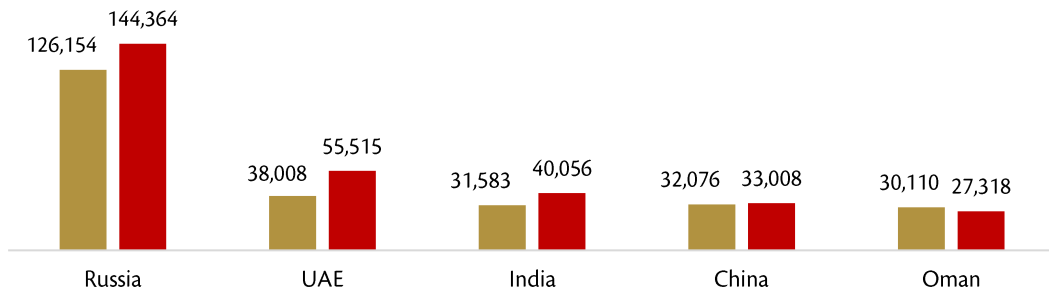




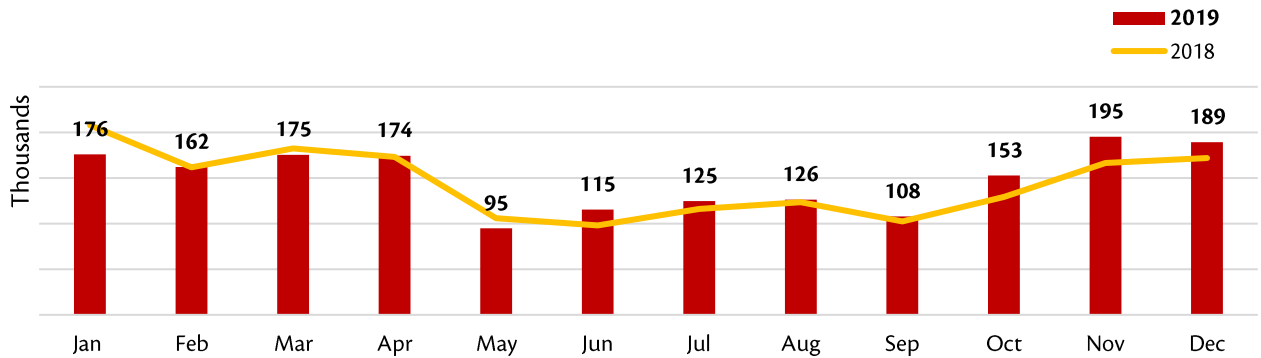
HOSPITALITY SECTOR PERFORMANCE

Top 5 Nationalities
(Hotel Establishments Guests)

■ YR2018 ■ YR2019

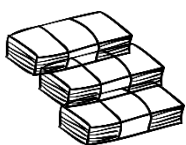


Hotel Guests Trend

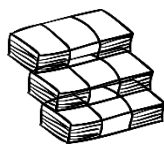


HOTEL REVENUE – Q4

173,480,960 175,711,490



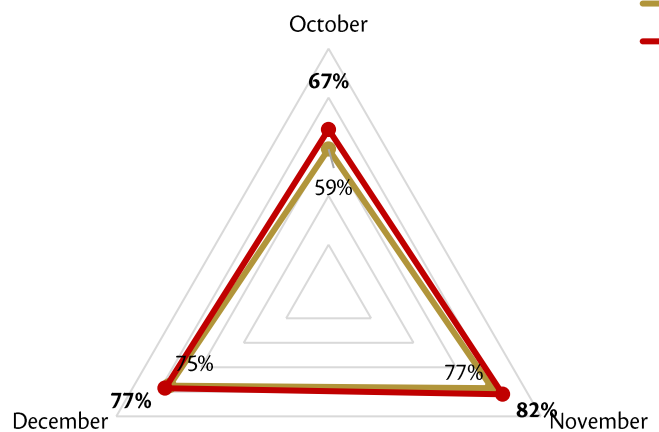
2018



2019

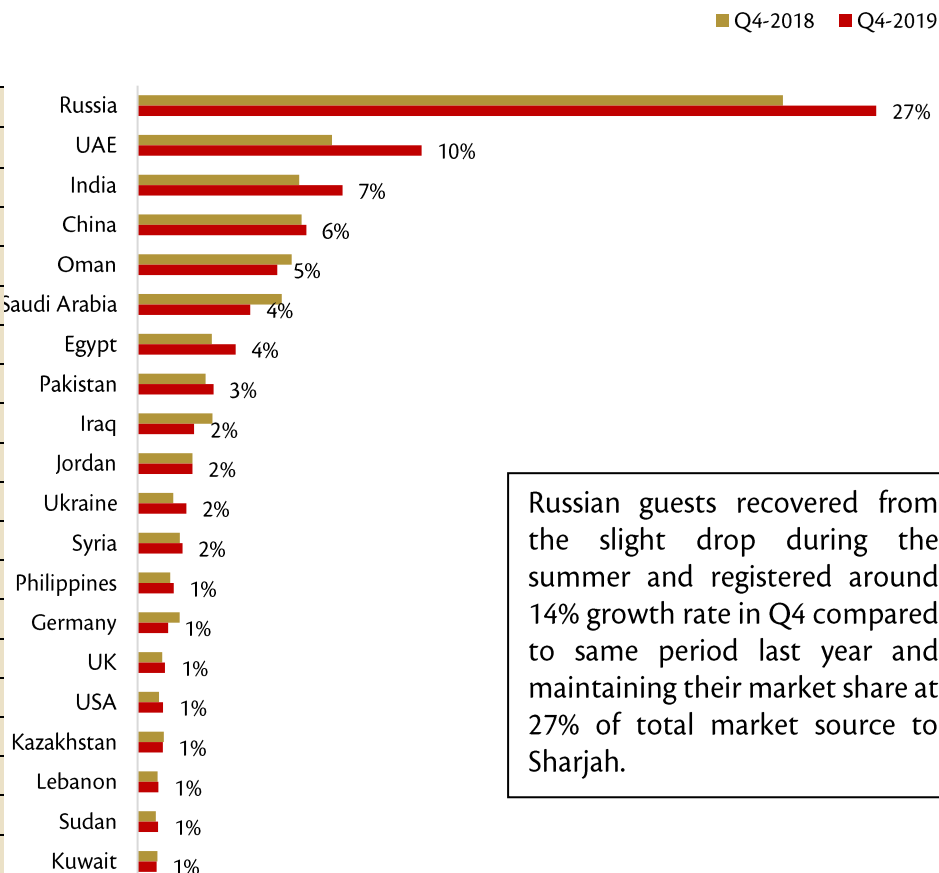
Average Occupancy Rate - Q4

● 2018 ● 2019



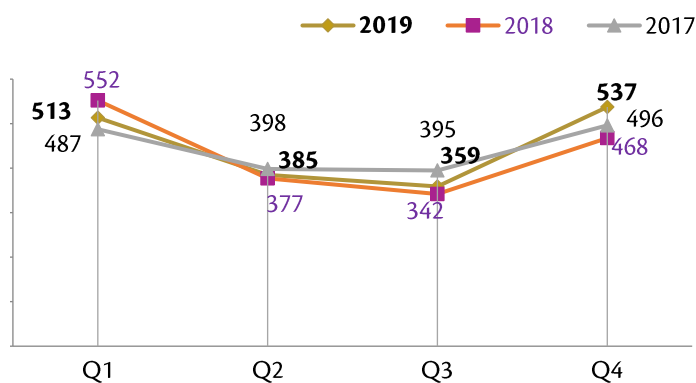
Top 20 Hotel Guests by Nationality and Market Share

ALOS Days	Nights Number	Growth %
2.59	144,364	14%
1.15	55,515	46%
1.72	40,056	27%
1.36	33,008	3%
1.32	27,318	-9%
1.69	22,019	-22%
2.82	19,181	32%
1.69	14,847	12%
3.34	11,057	-25%
1.93	10,718	0%
2.55	9,536	37%
2.18	8,799	7%
1.72	7,068	11%
2.15	5,977	-27%
1.97	5,362	11%
1.71	4,968	19%
3.12	4,958	-3%
1.68	4,069	4%
3.05	3,998	12%
1.85	3,710	-5%

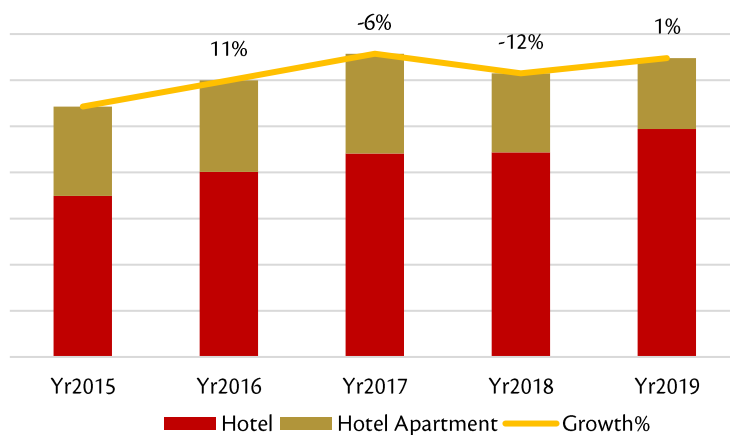


Russian guests recovered from the slight drop during the summer and registered around 14% growth rate in Q4 compared to same period last year and maintaining their market share at 27% of total market source to Sharjah.

Evolution in the number of Hotels Guest (000)



Hotel Establishments Room Demand Growth Trend - Q4

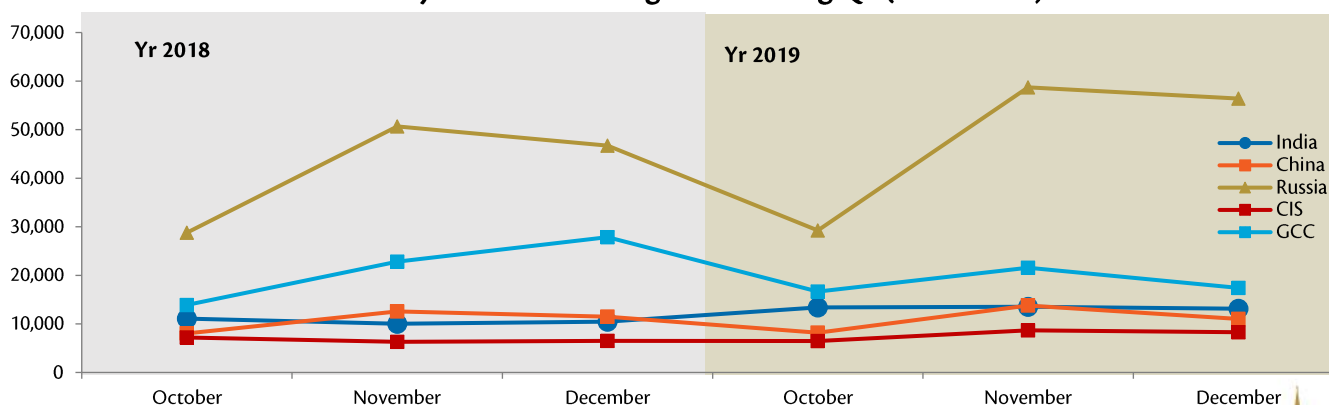


KEY SOURCE MARKETS PERFORMANCE

India	Guest		Growth%		2019 %Share	Guest Night		Growth%	
Month	Yr2018	Yr2019				Yr2018	Yr2019		
October	11,090	13,385	▲	21%	9%	23,269	25,469	▲	9%
November	10,032	13,529	▲	35%	10%	21,590	21,726	▲	1%
December	10,461	13,142	▲	26%	11%	21,121	21,566	▲	2%
Q4	31,583	40,056	▲	27%	7%	65,980	68,761	▲	4%
China	Guest		Growth%		2019 %Share	Guest Night		Growth%	
Month	Yr2018	Yr2019				Yr2018	Yr2019		
October	8,041	8,199	▲	2%	2%	13,326	14,202	▲	7%
November	12,555	13,779	▲	10%	2%	19,311	16,033	▼	-17%
December	11,480	11,030	▼	-4%	3%	15,810	14,784	▼	-6%
Q4	32,076	33,008	▲	3%	6%	48,447	45,019	▼	-7%
Russia	Guest		Growth%		2019 %Share	Guest Night		Growth%	
Month	Yr2018	Yr2019				Yr2018	Yr2019		
October	28,781	29,246	▲	2%	2%	80,706	82,336	▲	2%
November	50,654	58,711	▲	16%	3%	135,202	154,056	▲	14%
December	46,719	56,407	▲	21%	8%	131,670	138,232	▲	5%
Q4	126,154	144,364	▲	14%	27%	347,578	374,624	▲	8%
CIS	Guest		Growth%		2019 %Share	Guest Night		Growth%	
Month	Yr2018	Yr2019				Yr2018	Yr2019		
October	7,184	6,467	▼	-10%	4%	20,086	19,321	▼	-4%
November	6,309	8,674	▲	37%	4%	18,388	22,133	▲	20%
December	6,515	8,289	▲	27%	4%	18,003	22,018	▲	22%
Q4	20,008	23,430	▲	17%	4%	56,477	63,472	▲	12%
GCC	Guest		Growth%		2019 %Share	Guest Night		Growth%	
Month	Yr2018	Yr2019				Yr2018	Yr2019		
October	13,904	16,659	▲	20%	11%	20,823	25,772	▲	24%
November	22,830	21,582	▼	-5%	11%	33,968	32,203	▼	-5%
December	27,859	17,420	▼	-37%	9%	48,474	27,049	▼	-44%
Q4	64,593	55,661	▼	-14%	10%	103,265	85,024	▼	-18%

*All GCC countries excluding UAE

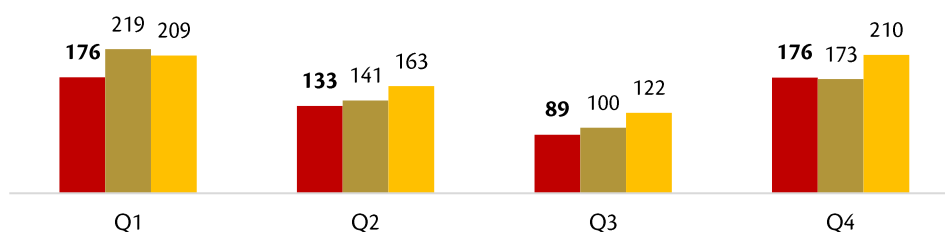
Key source markets growth during Q4 (2018-2019)



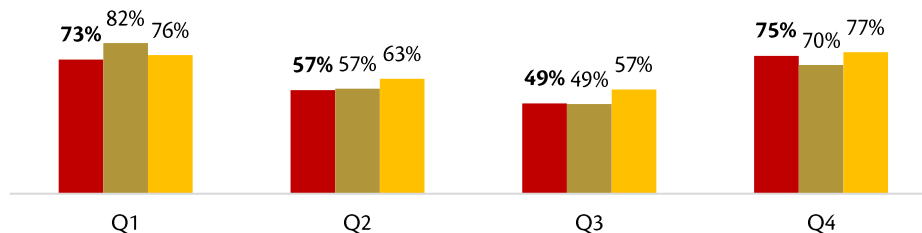
SECTOR PERFORMANCE – KEY INDICATORS (QUARTERLY)

■ 2019 ■ 2018 ■ 2017

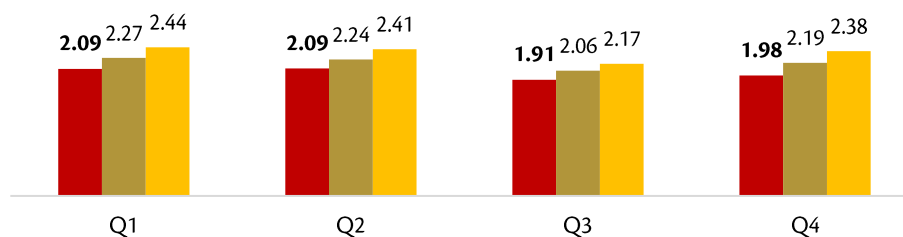
Revenue (AED Million)



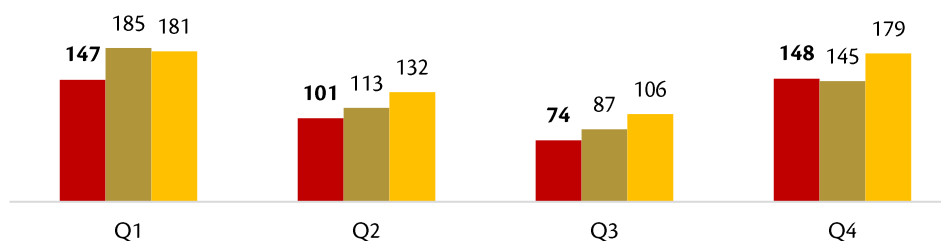
Occupancy %



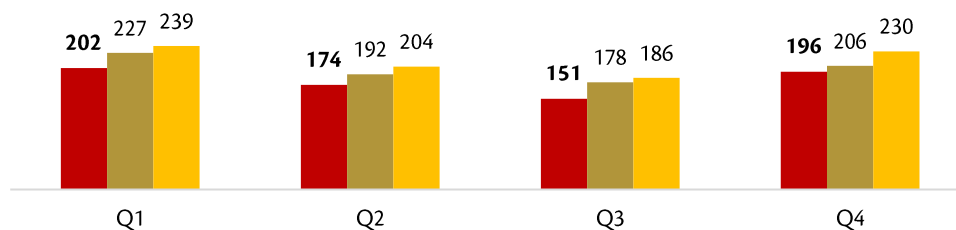
ALOS (DAYS)



REVPAR (AED)

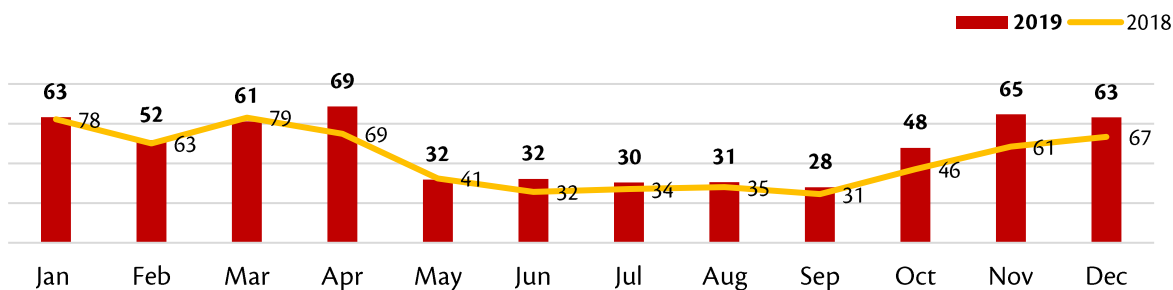


ADR (AED)

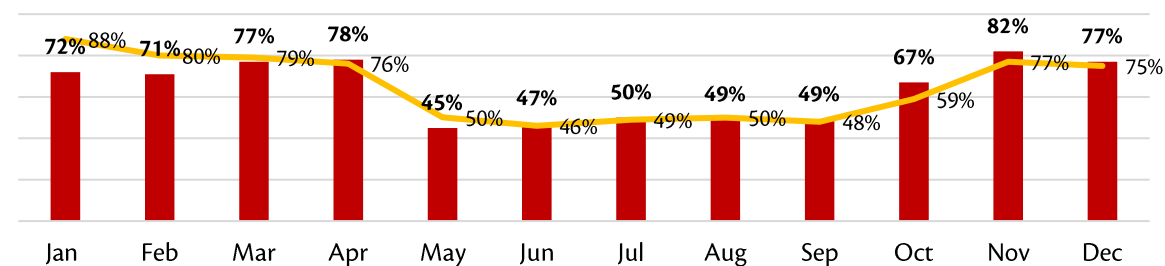


SECTOR PERFORMANCE – KEY INDICATORS (MONTHLY)

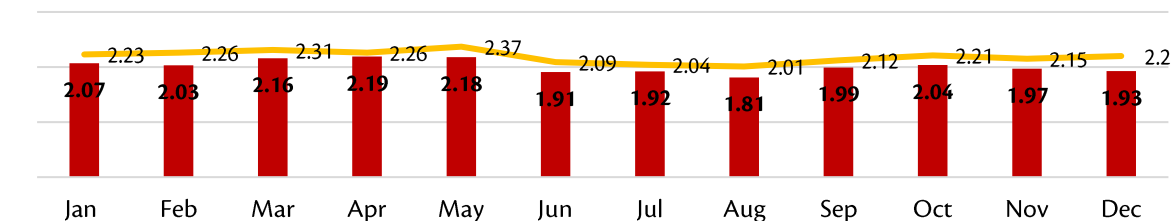
Revenue
(AED Million)



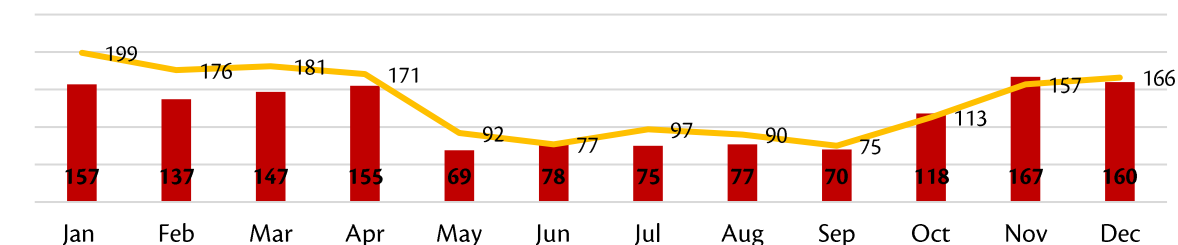
Occupancy %



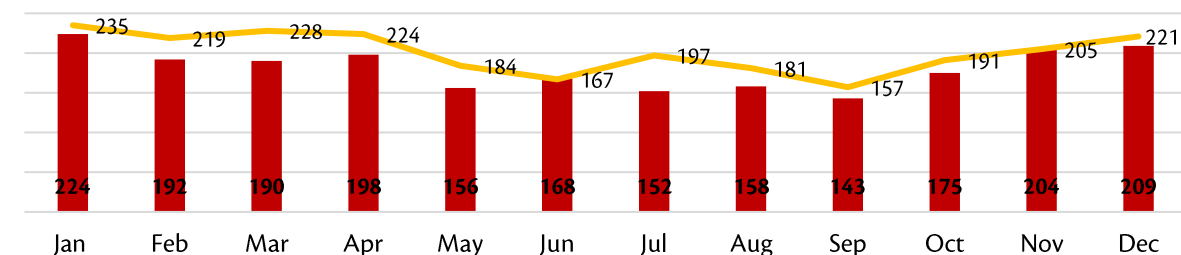
ALOS
(DAYS)



REVPAR
(AED)



ADR
(AED)

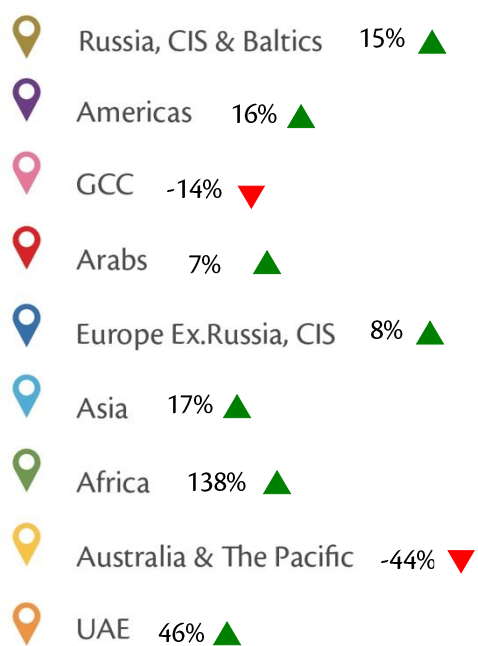




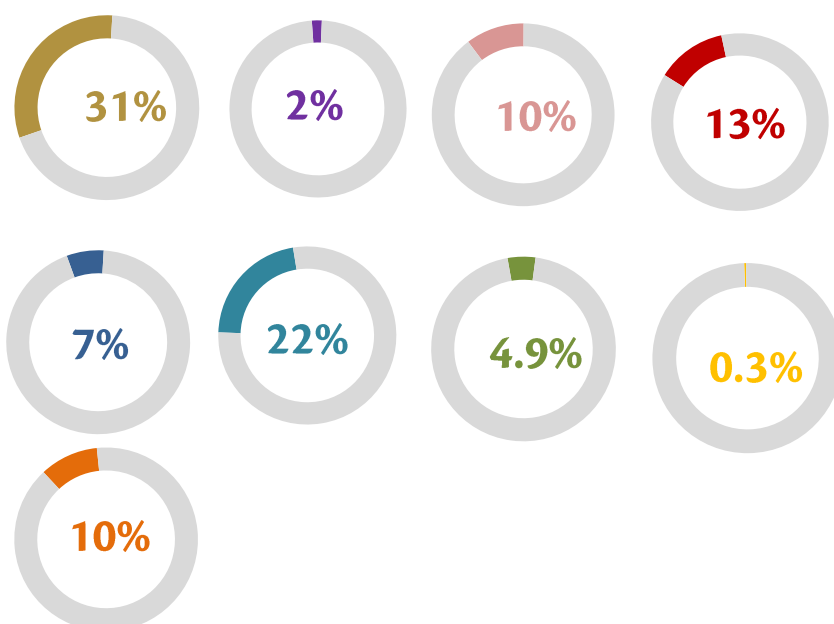
KEY INDICATORS BY REGION



GROWTH %



SHARE %





KEY INDICATORS PER HOTEL TYPE



★★★★★ 5-Star	Available Rooms	1,331					
	Occupancy	73%					
Number of Hotels:	ALOS	2.18					
9	RevPAR	237					
	Top 5 Nationalities	1)Russia	2)UAE	3)China	4)India	5)Germany	
★★★★★ 4-Star	Available Rooms	2,733					
	Occupancy	81%					
Number of Hotels:	ALOS	1.80					
21	RevPAR	167					
	Top 5 Nationalities	1)Russia	2)China	3)UAE	4)Oman	5)India	
★★★ 3-Star	Available Rooms	1,618					
	Occupancy	89%					
Number of Hotels:	ALOS	2.16					
11	RevPAR	152					
	Top 5 Nationalities	1)Russia	2)India	3)UAE	4)Oman	5)KSA	
★★ 2-Star	Available Rooms	644					
	Occupancy	64%					
Number of Hotels:	ALOS	2.21					
9	RevPAR	84					
	Top 5 Nationalities	1)India	2)Oman	3)Russia	4)Pakistan	5)KSA	
★ 1-Star	Available Rooms	366					
	Occupancy	63%					
Number of Hotels:	ALOS	2.53					
11	RevPAR	74					
	Top 5 Nationalities	1)India	2)Pakistan	3)Oman	4)Russia	5)Egypt	
Deluxe	Available Rooms	626					
	Occupancy	50%					
Number of Hotels:	ALOS	1.70					
6	RevPAR	127					
	Top 5 Nationalities	1)UAE	2)KSA	3)Oman	4)Russia	5)China	
Standard	Available Rooms	763					
	Occupancy	74%					
Number of Hotels:	ALOS	1.35					
7	RevPAR	138					
	Top 5 Nationalities	1)UAE	2)Russia	3)India	4)Iraq	5)Egypt	
Basic	Available Rooms	1,096					
	Occupancy	71%					
Number of Hotels:	ALOS	2.81					
27	RevPAR	93					
	Top 5 Nationalities	1)India	2)Oman	3)Russia	4)Egypt	5)Pakistan	





EXECUTIVE Year To Date SUMMARY (Q1 – Q4) 2019



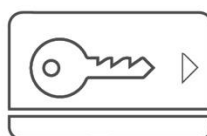
Jan to Dec - 2019

Sharjah Hotel Guests

Guest	Occupancy Rate%	ALOS (days)
1,794 K ▲ 3%	65% ▲ 2%	2.02 ▼ 7%
Total Revenue	RevPAR	ADR
AED 573 M ▼ 9%	AED 123 ▼ 8%	AED 185 ▼ 9%



101
HOTEL



9,177
ROOMS

STAR RATING

5 STAR	4 STAR	1 - 3 STAR	APTS
9	21	31	40
1,331	2,733	2,628	2,485





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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