

SHARJAH HOSPITALITY STATISTICS REPORT

Q4 – 2020

& Year – To - Date

Strategy – Research & Statistics Division

February, 2021





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 (Full Year) 2020.....	11
Glossary	13





EXECUTIVE SUMMARY



4th Quarter - 2020

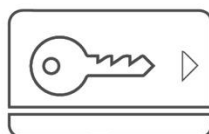
Sharjah Hotel Main Indicators

KEY PERFORMANCE INDICATORS

Guest	Occupancy Rate%	ALOS (days)
247,739 ▼ 54%	51% ▼ 24%	1.91 ▼ 3%
Total Revenue	RevPAR	ADR
AED 65,567,064 ▼ 63%	AED 86 ▼ 43%	AED 165 ▼ 63%



**103
HOTEL**



**6,456
ROOMS**

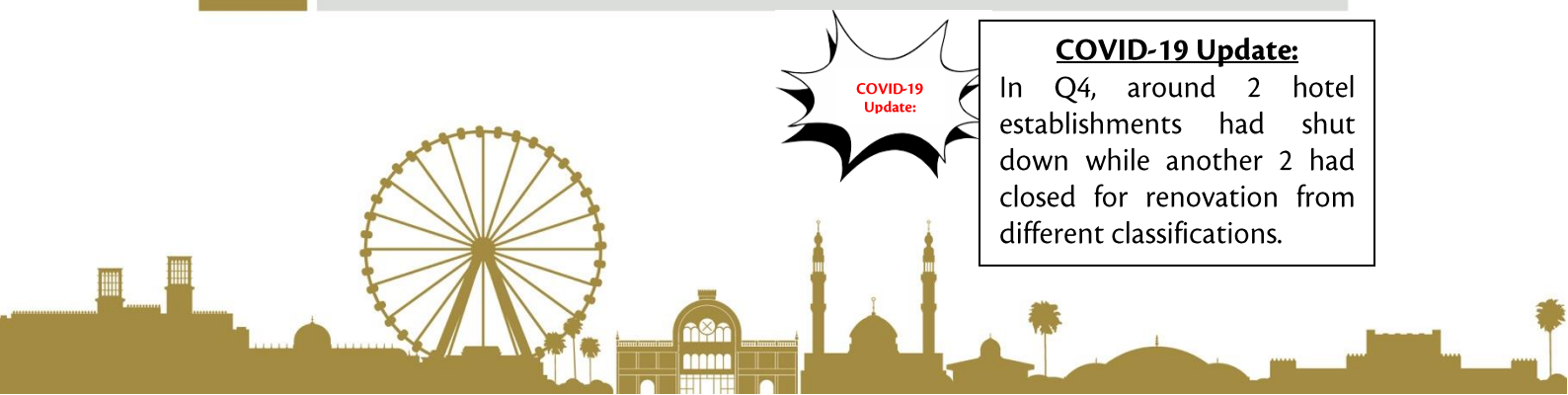
STAR RATING

5 STAR	4 STAR	1 - 3 STAR	APTS
12	20	31	40
628	1,724	2,063	2,041

COVID-19
Update:

COVID-19 Update:

In Q4, around 2 hotel establishments had shut down while another 2 had closed for renovation from different classifications.





HOSPITALITY SECTOR PERFORMANCE

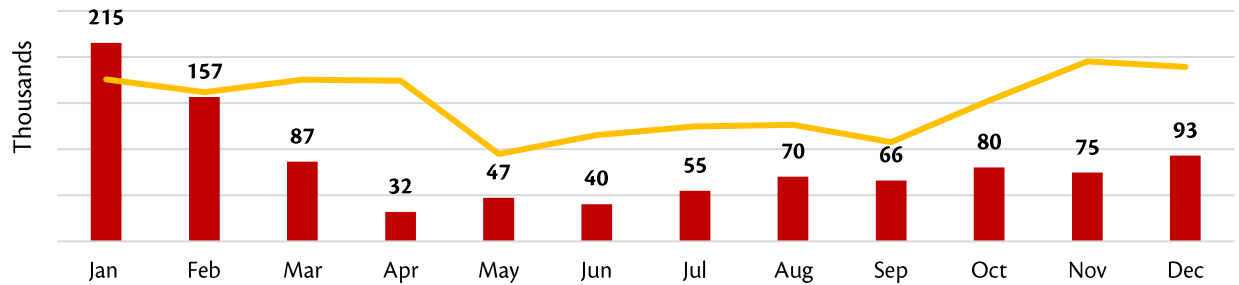
Top 5 Nationalities
(Hotel Establishments Guests)

■ YR2019 ■ YR2020



Hotel Guests (thousands)

■ 2020 ■ 2019



HOTEL REVENUE - Q4

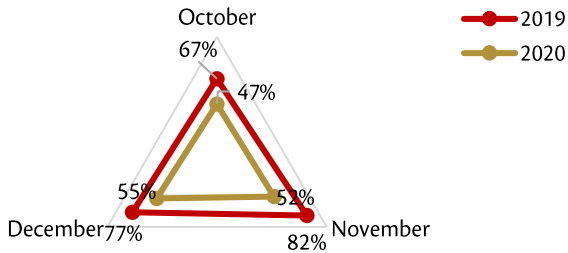
175,711,490

65,567,064

2019

2020

Average Occupancy Rate - Q4



COVID-19 Update:

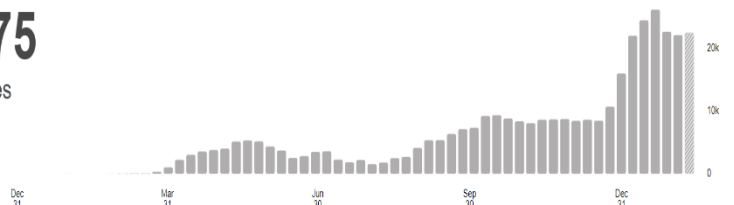
There was an improvement in guests' numbers during Q4 recovering from the drop during first half of 2020 due to the spread of the pandemic and the precautions measures of locking down.

Global > United Arab Emirates

United Arab Emirates Situation

368,175
confirmed cases

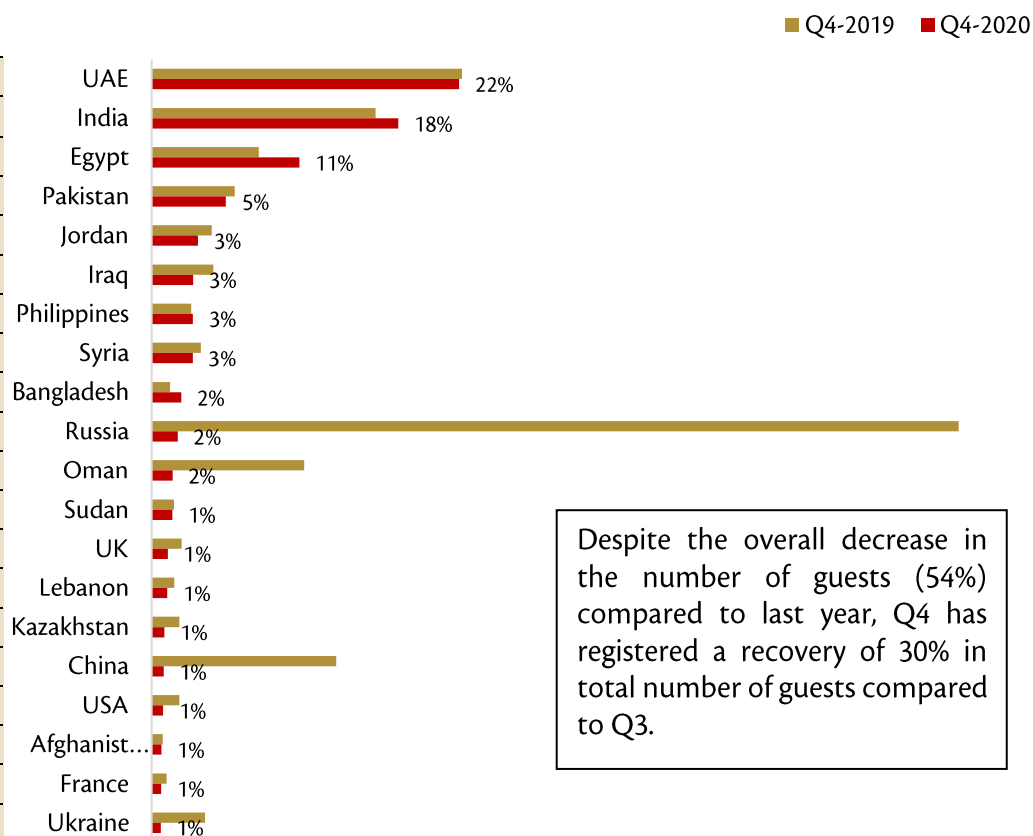
Daily Weekly



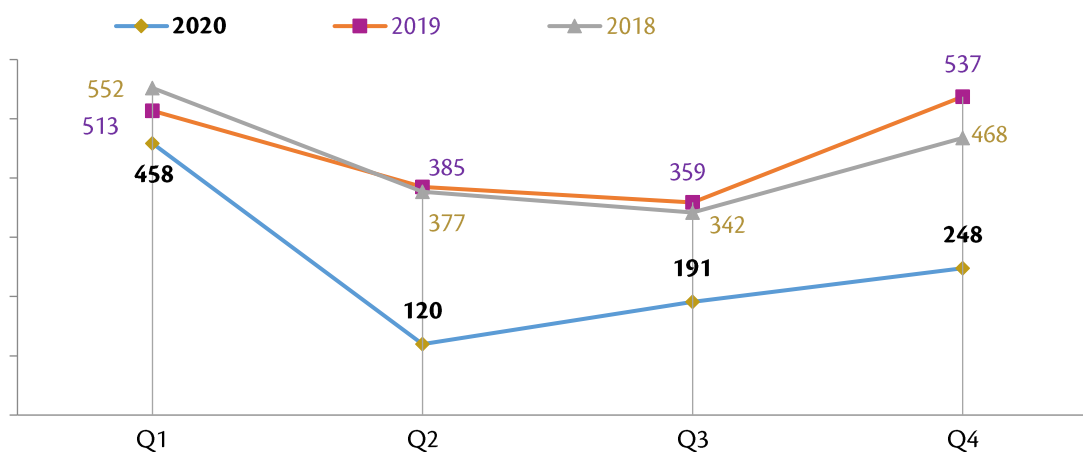
Source: World Health Organization (WHO)

Top 20 Hotel Guests by Nationality & Market Share

ALOS Days	Nights Number	Growth %
1.26	69,072	-1%
2.08	91,810	10%
2.24	59,075	38%
1.73	22,945	-11%
1.91	15,821	-23%
4.45	33,033	-33%
1.87	13,854	5%
2.21	16,246	-16%
3.02	15,992	60%
2.21	10,325	-97%
1.57	5,905	-86%
2.62	9,644	-8%
2.07	5,962	-46%
1.78	4,943	-32%
2.18	4,907	-55%
1.25	2,682	-93%
1.74	3,557	-59%
2.07	3,623	-13%
1.66	2,809	-37%
1.93	3,112	-83%



Evolution in the number of Hotels Guest (000)

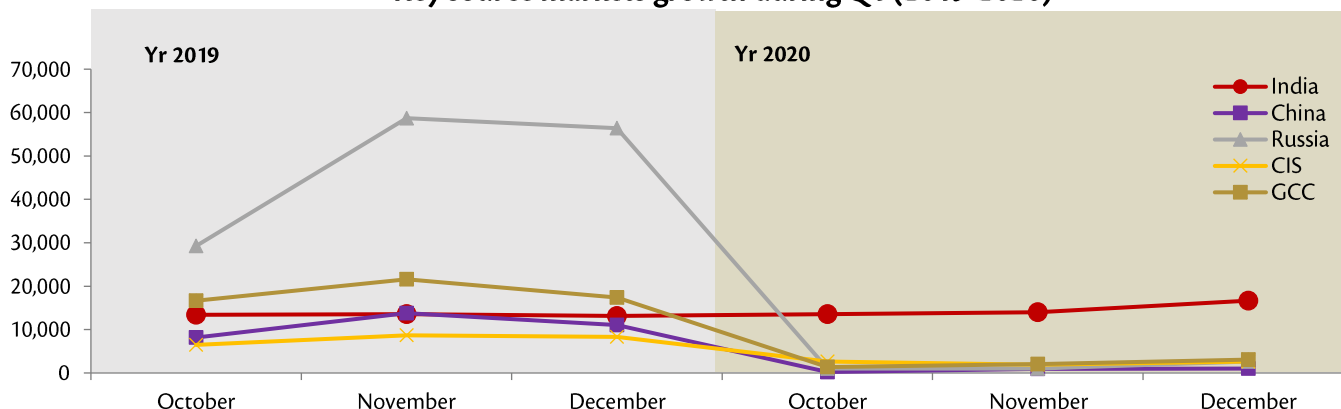


KEY SOURCE MARKETS PERFORMANCE

India	Guest		Growth%		2020 %Share	Guest Night		Growth%	
Month	Yr2019	Yr2020				Yr2019	Yr2020		
October	13,385	13,529	▲	1%	17%	25,469	23,484	▼	-8%
November	13,529	13,961	▲	3%	19%	21,726	29,148	▲	34%
December	13,142	16,657	▲	27%	18%	21,566	39,178	▲	82%
Q4	40,056	44,147	▲	10%	18%	68,761	91,810	▲	34%
China	Guest		Growth%		2020 %Share	Guest Night		Growth%	
Month	Yr2019	Yr2020				Yr2019	Yr2020		
October	8,199	224	▼	-97%	0%	14,202	677	▼	-95%
November	13,779	952	▼	-93%	1%	16,033	1,096	▼	-93%
December	11,030	977	▼	-91%	1%	14,784	909	▼	-94%
Q4	33,008	2,153	▼	-93%	1%	45,019	2,682	▼	-94%
Russia	Guest		Growth%		2020 %Share	Guest Night		Growth%	
Month	Yr2019	Yr2020				Yr2019	Yr2020		
October	29,246	1,024	▼	-96%	1%	82,336	2,091	▼	-97%
November	58,711	1,008	▼	-98%	1%	154,056	2,277	▼	-99%
December	56,407	2,642	▼	-95%	3%	138,232	5,957	▼	-96%
Q4	144,364	4,674	▼	-97%	2%	374,624	10,325	▼	-97%
CIS	Guest		Growth%		2020 %Share	Guest Night		Growth%	
Month	Yr2019	Yr2020				Yr2019	Yr2020		
October	6,467	2,606	▼	-60%	3%	19,321	4,936	▼	-74%
November	8,674	1,899	▼	-78%	3%	22,133	3,965	▼	-82%
December	8,289	2,646	▼	-68%	3%	22,018	6,035	▼	-73%
Q4	23,430	7,151	▼	-69%	3%	63,472	14,936	▼	-76%
GCC	Guest		Growth%		2020 %Share	Guest Night		Growth%	
Month	Yr2019	Yr2020				Yr2019	Yr2020		
October	16,659	1,362	▼	-92%	2%	25,772	2,885	▼	-89%
November	21,582	2,068	▼	-90%	3%	32,203	3,910	▼	-88%
December	17,420	3,055	▼	-82%	3%	27,049	4,947	▼	-82%
Q4	55,661	6,485	▼	-88%	3%	85,024	11,742	▼	-86%

*All GCC countries excluding UAE

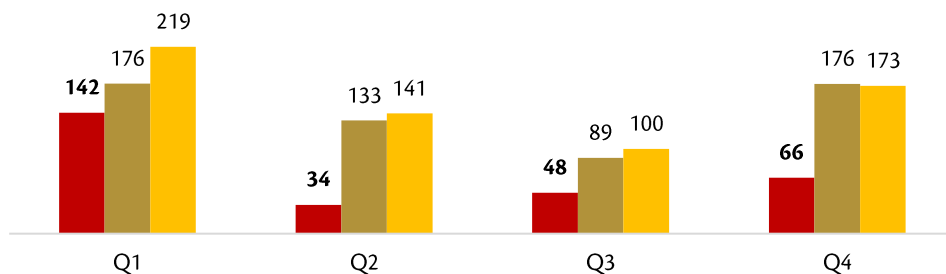
Key source markets growth during Q4 (2019-2020)



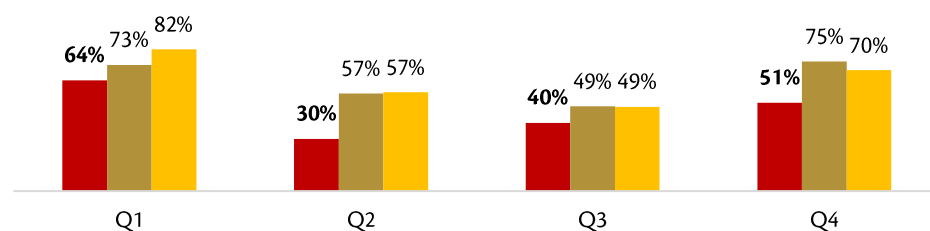
SECTOR PERFORMANCE – KEY INDICATORS (QUARTERLY)

■ 2020 ■ 2019 ■ 2018

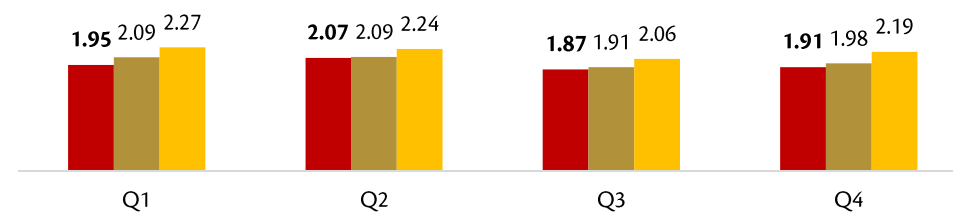
Revenue (AED Million)



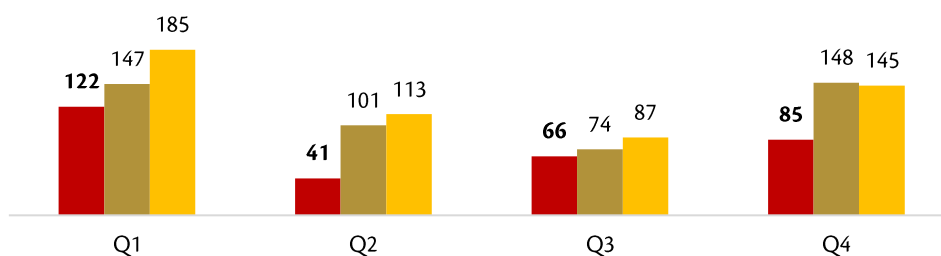
Occupancy %



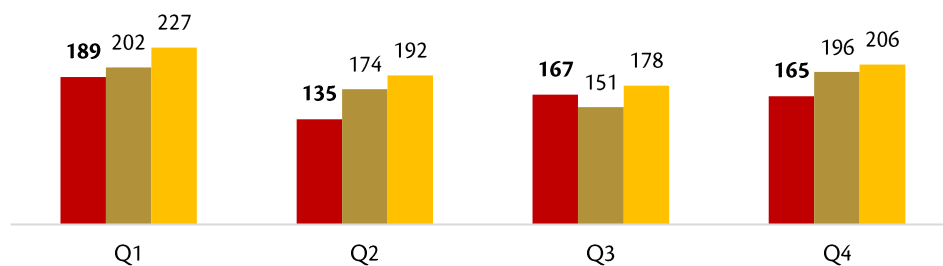
ALOS (DAYS)



REVPAR (AED)



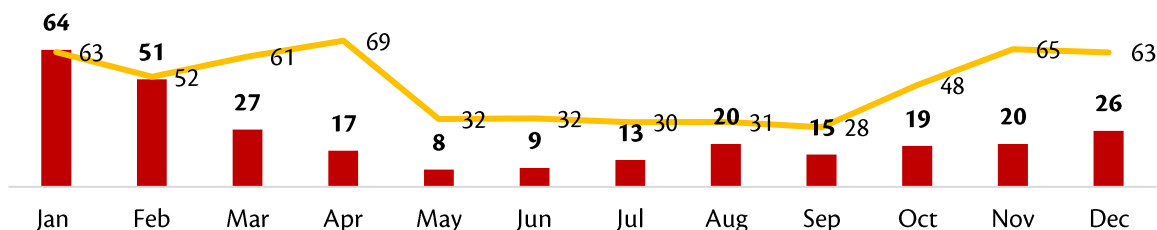
ADR (AED)



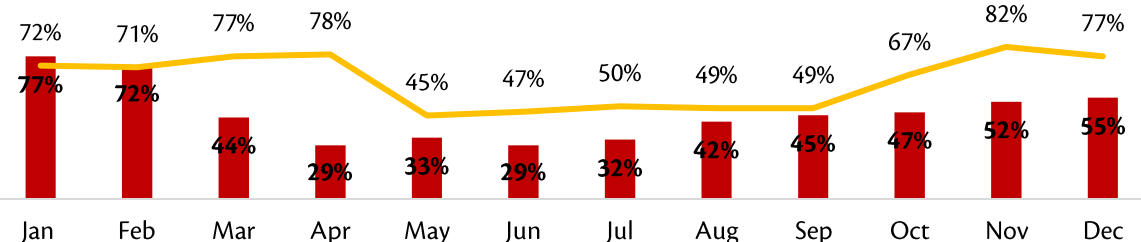
SECTOR PERFORMANCE – KEY INDICATORS (MONTHLY)

2020 2019

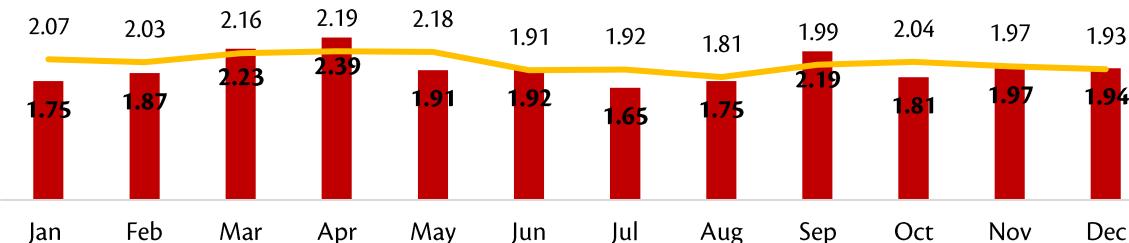
Revenue
(AED Million)



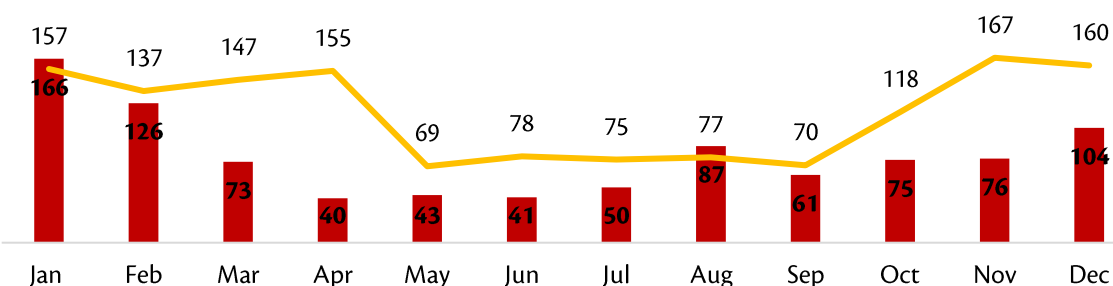
Occupancy %



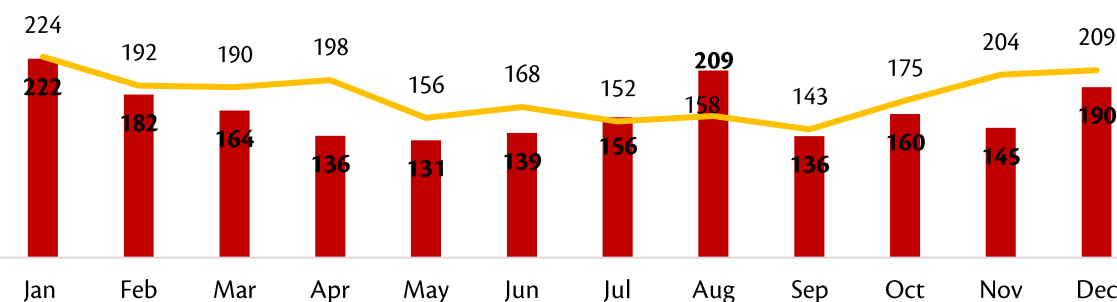
ALOS
(DAYS)



REVPAR
(AED)



ADR
(AED)

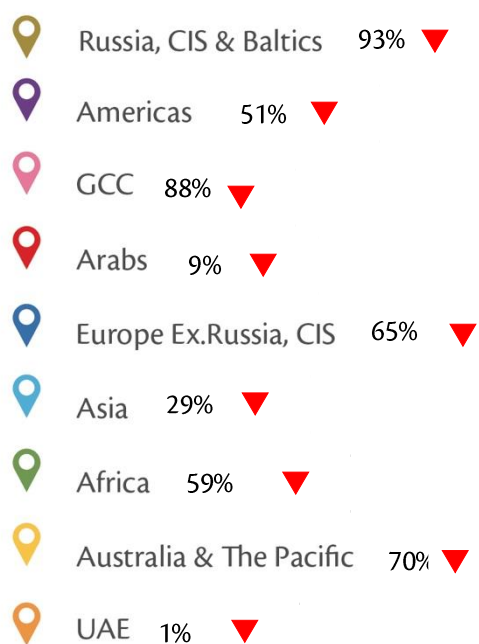




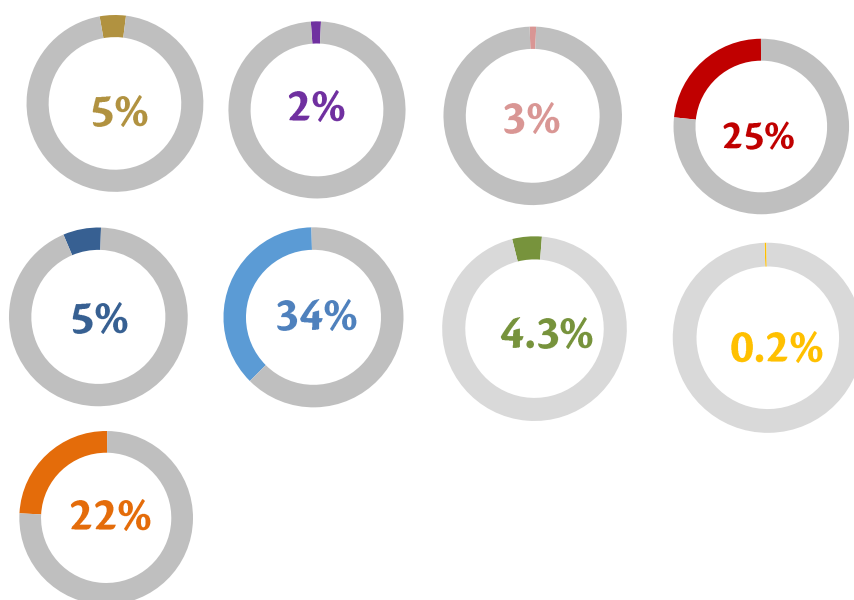
KEY INDICATORS BY REGION



GROWTH %



SHARE %





KEY INDICATORS PER HOTEL TYPE



★★★★★ 5-Star	Available Rooms	628					
	Occupancy	31%					
Number of Hotels:	ALOS	1.51					
12	RevPAR	162					
	Top 5 Nationalities	1) UAE	2) India	3) France	4) Jordan	5) Egypt	
★★★★★ 4-Star	Available Rooms	1,724					
	Occupancy	40%					
Number of Hotels:	ALOS	1.95					
20	RevPAR	74					
	Top 5 Nationalities	1) UAE	2) India	3) Egypt	4) Russia	5) Syria	
★★★ 3-Star	Available Rooms	1,285					
	Occupancy	69%					
Number of Hotels:	ALOS	1.42					
12	RevPAR	92					
	Top 5 Nationalities	1) India	2) UAE	3) Egypt	4) Pakistan	5) Philippines	
★★ 2-Star	Available Rooms	428					
	Occupancy	53%					
Number of Hotels:	ALOS	3.14					
9	RevPAR	51					
	Top 5 Nationalities	1) India	2) Pakistan	3) UAE	4) Egypt	5) Bangladesh	
★ 1-Star	Available Rooms	350					
	Occupancy	47%					
Number of Hotels:	ALOS	2.69					
10	RevPAR	45					
	Top 5 Nationalities	1) India	2) Pakistan	3) Bangladesh	4) Egypt	5) Philippines	
Deluxe	Available Rooms	751					
	Occupancy	55%					
Number of Hotels:	ALOS	2.43					
6	RevPAR	89					
	Top 5 Nationalities	1) UAE	2) Egypt	3) India	4) Iraq	5) Pakistan	
Standard	Available Rooms	521					
	Occupancy	53%					
Number of Hotels:	ALOS	1.37					
8	RevPAR	91					
	Top 5 Nationalities	1) India	2) UAE	3) Egypt	4) Iraq	5) Jordan	
Basic	Available Rooms	769					
	Occupancy	58%					
Number of Hotels:	ALOS	2.95					
26	RevPAR	69					
	Top 5 Nationalities	1) India	2) Egypt	3) Pakistan	4) Philippines	5) Jordan	





EXECUTIVE Year to Date SUMMARY (Q1 – Q4) 2020



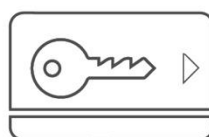
Jan to Dec - 2020

Sharjah Hotel Guests

Guest	Occupancy Rate%	ALOS (days)
1,017 K ▼ 43%	48% ▼ 18%	1.90 ▼ 6%
Total Revenue	RevPAR	ADR
AED 289 M ▼ 50%	AED 86 ▼ 28%	AED 175 ▼ 5%



103
HOTEL



6,842
ROOMS

STAR RATING

5 STAR	4 STAR	1 - 3 STAR	APTS
12	20	31	40
681	1,682	2,239	2,242

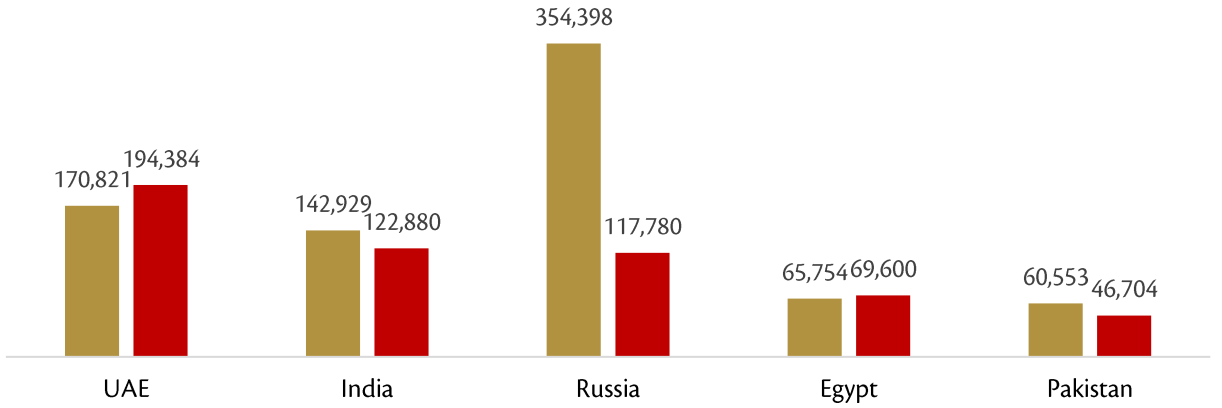




HOSPITALITY SECTOR PERFORMANCE

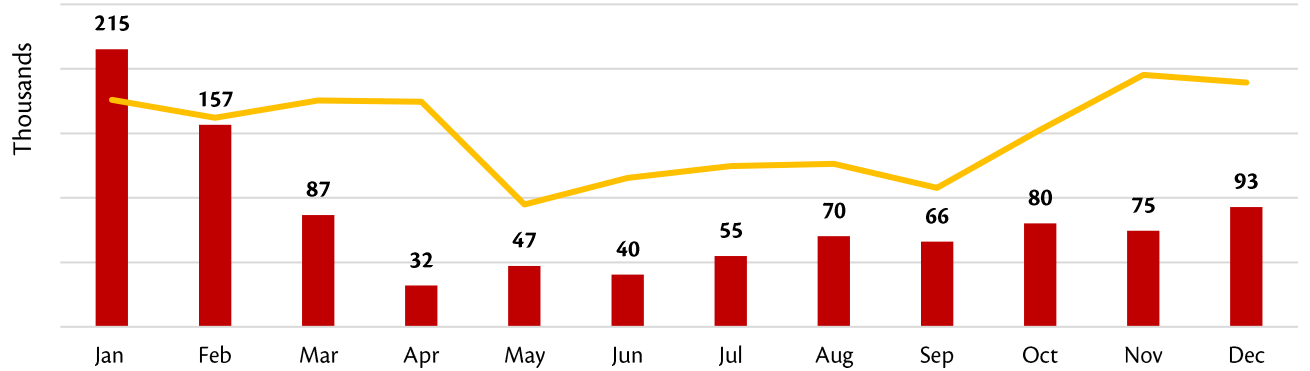
Top 5 Nationalities
(Hotel Establishments Guests)

■ Y2019 ■ Y2020



Hotel Guests (thousands)

■ 2020 — 2019





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.

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

Prepared by:

Niama Al Ali – Research & Statistics Division

Reviewed by:

Murtada Al Zaylaie – Excellence Advisor & Strategy Department Acting Manager

Copyrights

This report is a property of SCTDA, and it retains all title, ownership and intellectual property rights to the content and information contained herein. Recipient will not disclose, publish or otherwise reveal any of the confidential information in this report to any other party whatsoever except with the specific prior written authorization of SCTDA.

All rights reserved. No part of this report may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying, recording, or by any information storage and retrieval system without permission from the Sharjah Commerce and Tourism Development Authority.