SHARJAH HOSPITALITY

STATISTICS REPORT

Q3 – 2021

& Year – To - Date

Strategy – Research & Statistics Division
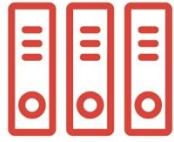
October, 2021

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EXECUTIVE SUMMARY

3rd Quarter - 2021

Sharjah Hotel Main Indicators

Table 1: Sharjah Tourism Main Indicators – Q3 2021

KEY PERFORMANCE INDICATORS	Guest	Occupancy Rate%	ALOS (days)
	267,612 ▲ 40%	56% ▲ 16%	2.32 ▲ 24%
	Total Revenue	**RevPAR**	**ADR**
	AED 87,486,529 ▲ 83%	AED 93 ▲ 48%	AED 164 ▶ 0%

102 HOTEL
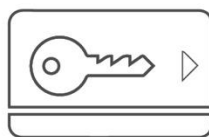
7,537 ROOMS

Table 2: Number of Hotels and rooms by star rating

STAR RATING	5 STAR	4 STAR	1 - 3 STAR	APTS
	12	20	32	38
	977	2,076	2,298	2,186

HOSPITALITY
SECTOR PERFORMANCE

Figure 1: top 5 source markets in Sharjah by nationality during Q3 (2020 – 2021)
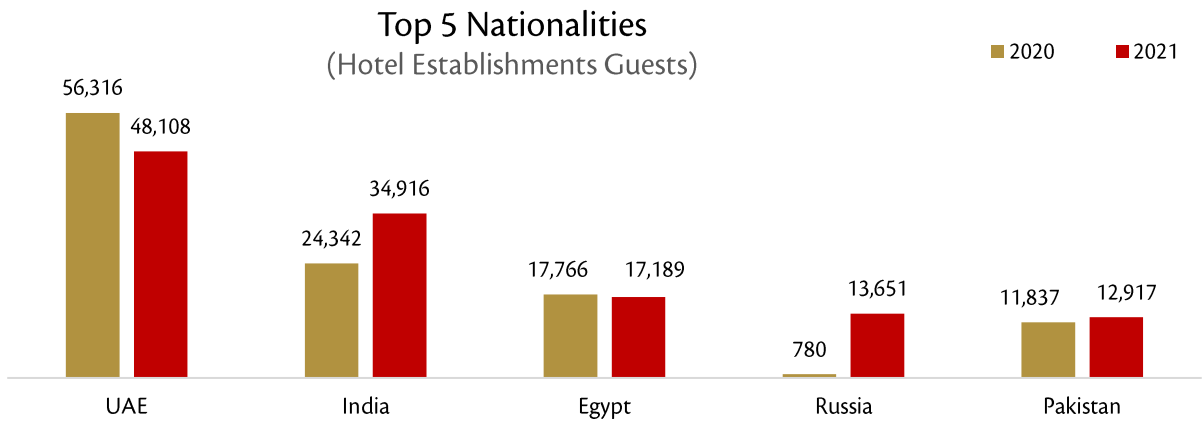
Top 5 Nationalities
(Hotel Establishments Guests)

■ 2020   ■ 2021

Nationality	2020	2021
UAE	56,316	48,108
India	24,342	34,916
Egypt	17,766	17,189
Russia	780	13,651
Pakistan	11,837	12,917

Figure 2: Hotel guests in Sharjah during third quarter 2020-2021

Hotel Guests in Q3 (2020-2021)

■ 2020   ■ 2021

Thousands

Month	2020	2021
Jan	215	94
Feb	157	92
Mar	87	109
Apr	32	84
May	47	86
Jun	40	92
Jul	55	86
Aug	70	91
Sep	66	91
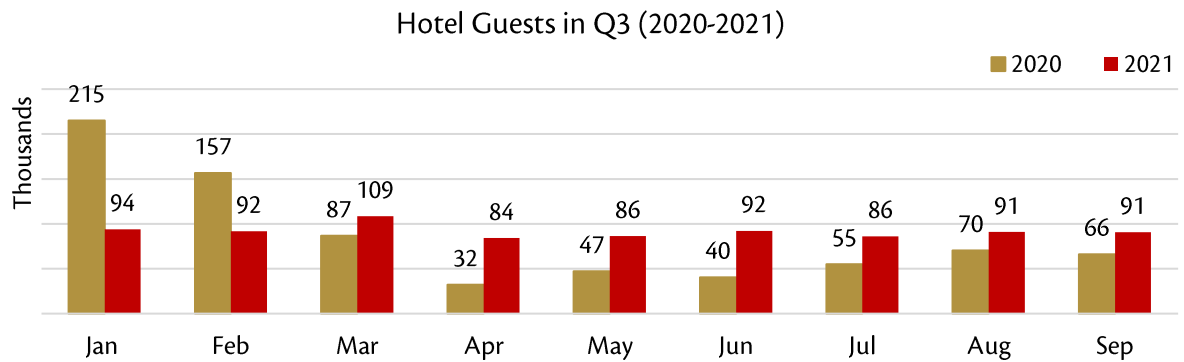
Figure 3: Hotel Establishments total revenue – Q3

HOTEL REVENUE – Q3

47,931,431   87,486,529

2020   **2021**
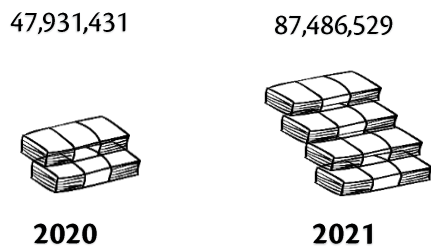
KEY INDICATORS BY REGION

SHARE %

- 2%
- 5%
- 10%
- 8%
- 22%
- 31%
- 18%
- 4%
- 0%
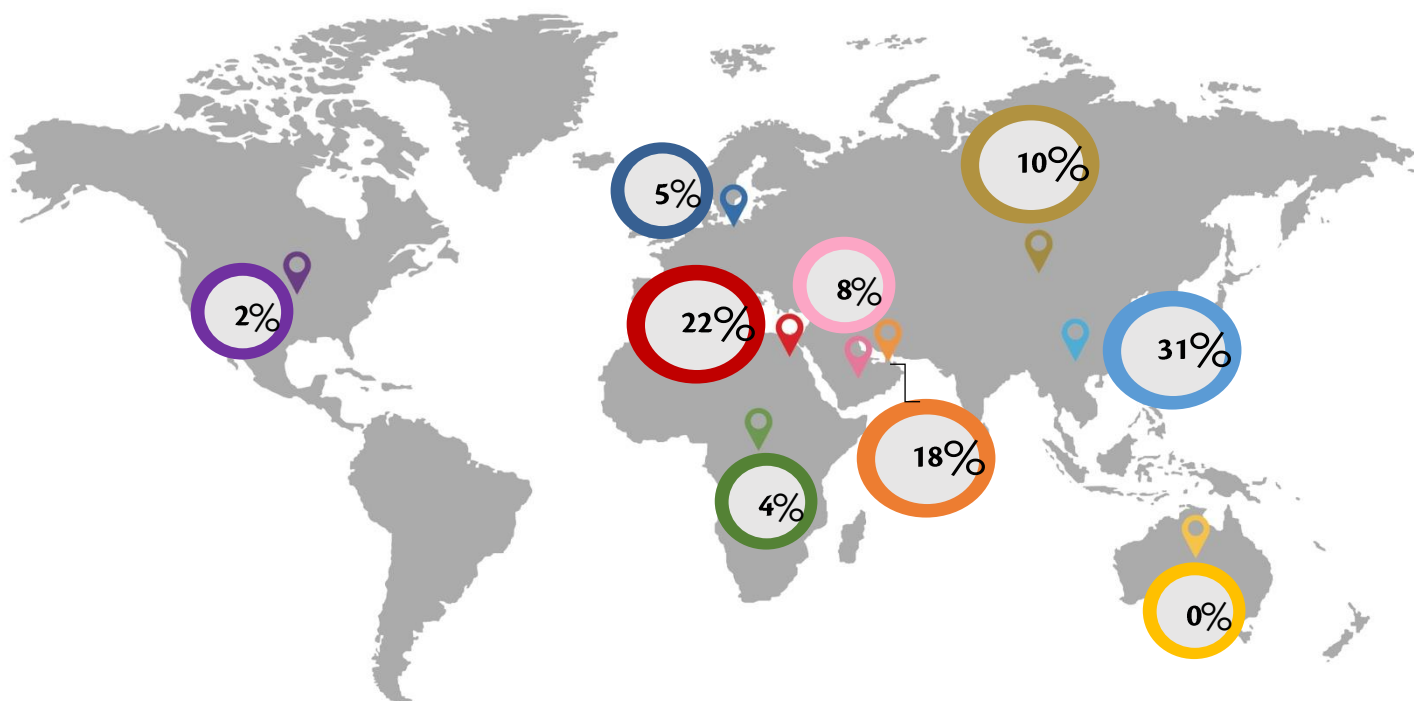
GROWTH %

Region	Growth	
Russia, CIS & Baltic	420%	▲
Americas	85%	▲
GCC	552%	▲
Arabs	18%	▲
Europe Ex.Russia, CIS	78%	▲
Asia	45%	▲
Africa	24%	▲
Australia & The Pacific	12%	▲
UAE	15%	▼

الشارقة
Sharjah ®

TOP 20 SOURCE MARKETS

Figure 5: Market Share % for the Top 20 Source Markets during Q3 - 2021.
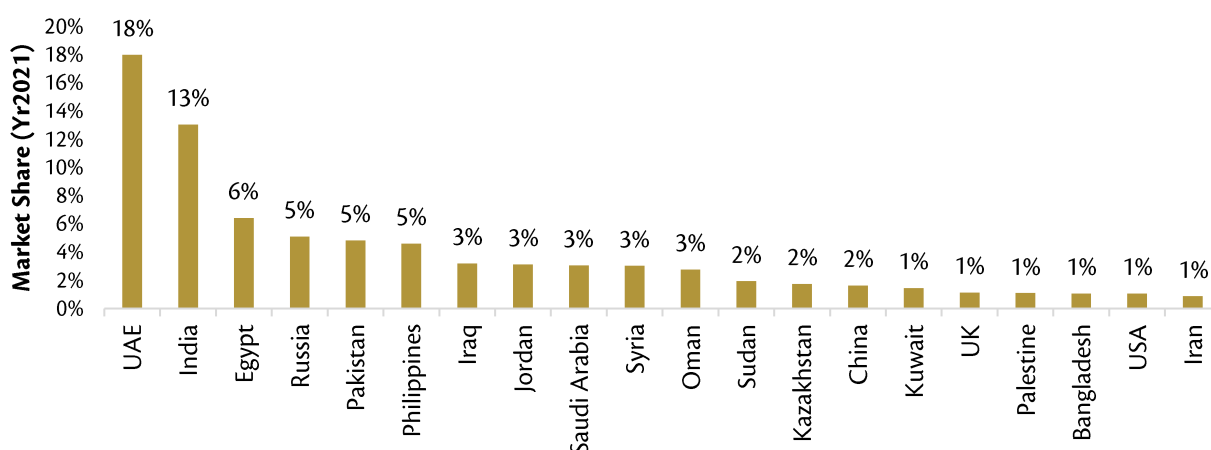
Table 3: Top 20 source markets

Rank	Market	ALOS Days	Nights Number	Change %
1	UAE	1.61	77,408	-15%
2	India	2.74	95,640	43%
3	Egypt	3.43	58,940	-3%
4	Russia	2.75	37,573	1650%
5	Pakistan	1.84	23,825	9%
6	Philippines	2.15	26,503	89%
7	Iraq	5.00	42,728	7%
8	Jordan	2.48	20,719	29%
9	Saudi Arabia	1.52	12,399	795%
10	Syria	2.40	19,503	49%
11	Oman	1.68	12,423	448%
12	Sudan	2.75	14,330	86%
13	Kazakhstan	2.83	13,207	302%
14	China	1.24	5,364	235%
15	Kuwait	2.26	8,801	458%
16	UK	2.19	6,658	67%
17	Palestine	2.11	6,239	80%
18	Bangladesh	1.89	5,354	12%
19	USA	2.03	5,746	76%
20	Iran	3.32	7,803	234%

The lift of most travel restrictions and the recovery observed in the sector is observed in the decline in the domestic tourism by 15% during the third quarter. On the other hand, most of tourism demand is from outbound tourism

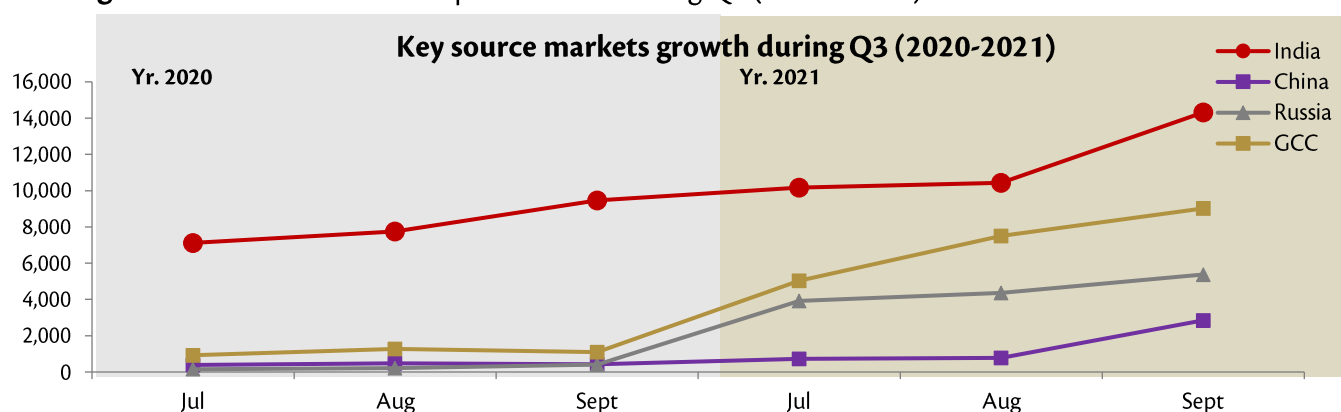**Figure 6:** Average Occupancy Rate - Q3
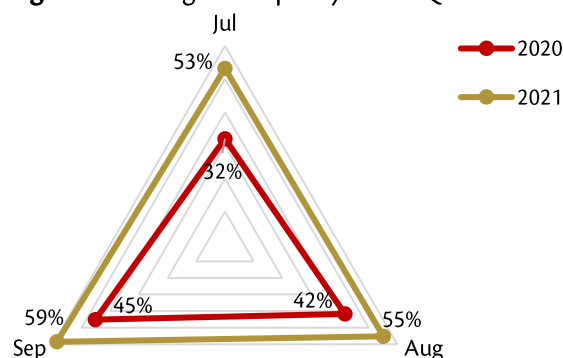
KEY SOURCE MARKETS PERFORMANCE

Table 4: Key source markets performance

India	Guest		Growth%		2021 %Share	Guest Night		Growth%	
Month	Yr2020	Yr2021				Yr2020	Yr2021		
Jul	7,120	10,164	▲	43%	12%	14,174	23,945	▲	69%
Aug	7,759	10,437	▲	35%	11%	14,623	23,747	▲	62%
Sept	9,463	14,315	▲	51%	16%	16,827	47,948	▲	185%
Q3	**24,342**	**34,916**	▲	**43%**	**13%**	**45,624**	**95,640**	▲	**110%**
China	Guest		Growth%		2021 %Share	Guest Night		Growth%	
Month	Yr2020	Yr2021				Yr2020	Yr2021		
Jul	389	717	▲	84%	1%	459	1,350	▲	194%
Aug	484	772	▲	60%	1%	771	2,598	▲	237%
Sept	422	2,850	▲	575%	3%	912	1,416	▲	55%
Q3	**1,295**	**4,339**	▲	**235%**	**2%**	**2,142**	**5,364**	▲	**150%**
Russia	Guest		Growth%		2021 %Share	Guest Night		Growth%	
Month	Yr2020	Yr2021				Yr2020	Yr2021		
Jul	152	3,919	▲	2478%	5%	690	11,915	▲	1627%
Aug	213	4,356	▲	1945%	5%	611	11,301	▲	1750%
Sept	415	5,376	▲	1195%	6%	1,169	14,357	▲	1128%
Q3	**780**	**13,651**	▲	**1650%**	**5%**	**2,470**	**37,573**	▲	**1421%**
GCC	Guest		Growth%		2021 %Share	Guest Night		Growth%	
Month	Yr2020	Yr2021				Yr2020	Yr2021		
Jul	925	5,030	▲	444%	6%	1,568	9,187	▲	486%
Aug	1,280	7,511	▲	487%	8%	3,099	12,742	▲	311%
Sept	1,102	9,022	▲	719%	10%	2,626	16,177	▲	516%
Q3	**3,307**	**21,563**	▲	**552%**	**8%**	**7,293**	**38,106**	▲	**423%**

*All GCC countries excluding UAE

Figure 7: Main source markets performance during Q3 (2020 – 2021)

Key source markets growth during Q3 (2020-2021)

SECTOR PERFORMANCE –
KEY INDICATORS (QUARTERLY)

Legend: 2019 | 2020 | **2021**

Revenue (AED Million)

	Q1	Q2	Q3	Q4
2019	176	133	89	176
2020	142	25	48	66
2021	**79**	**85**	**87**	

Occupancy %

	Q1	Q2	Q3	Q4
2019	73%	57%	49%	75%
2020	64%	30%	40%	51%
2021	**53%**	**58%**	**56%**	

ALOS (DAYS)

	Q1	Q2	Q3	Q4
2019	2.09	2.09	1.91	1.98
2020	1.95	2.07	1.87	1.91
2021	**1.83**	**2.25**	**2.33**	

REVPAR (AED)

	Q1	Q2	Q3	Q4
2019	147	101	74	148
2020	122	41	66	85
2021	**92**	**95**	**93**	

ADR (AED)

	Q1	Q2	Q3	Q4
2019	202	174	151	196
2020	189	135	167	165
2021	**174**	**164**	**167**	
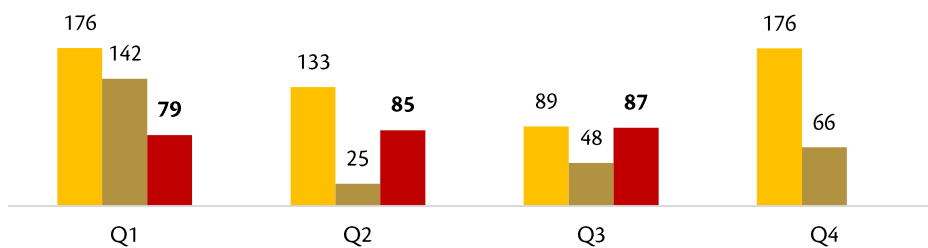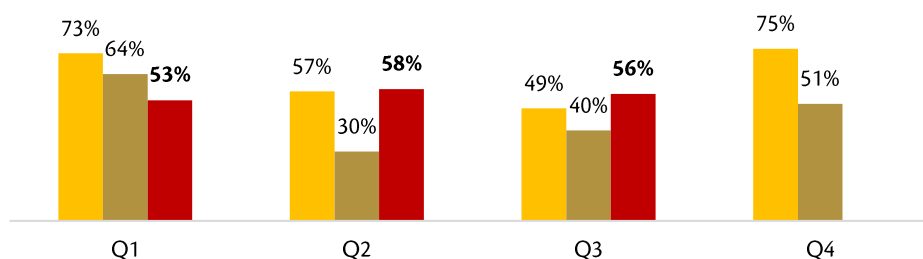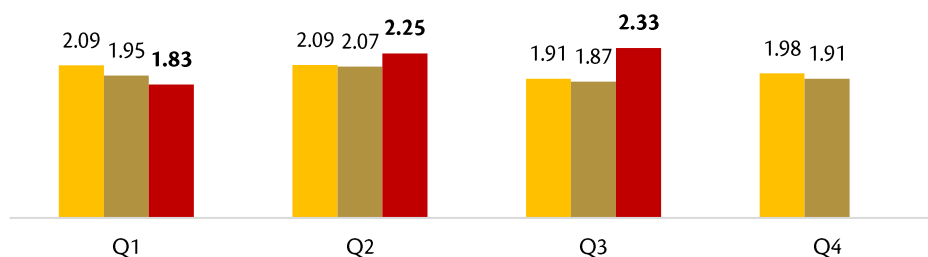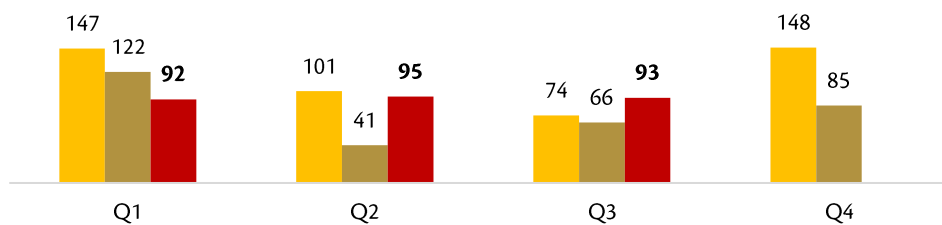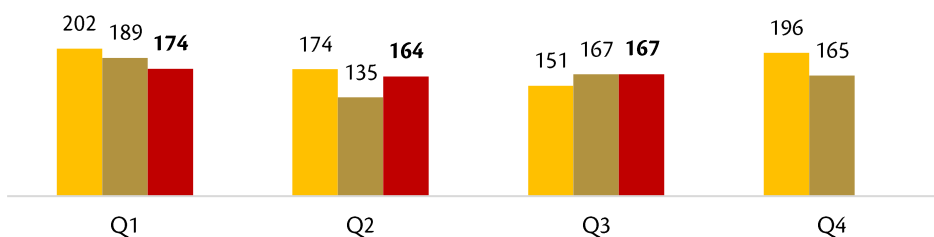
*Some figures in Q1 have been updated

SECTOR PERFORMANCE – KEY INDICATORS (MONTHLY)

2021 ▬ 2020

Revenue (AED Million)

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2021	25	24	30	29	28	28	27	28	32			
2020	64	51	27	8	8	9	13	20	15	19	20	26

Occupancy %

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2021	47%	57%	55%	60%	53%	60%	53%	55%	59%			
2020	77%	72%	44%	29%	33%	29%	32%	42%	45%	47%	52%	55%

ALOS (DAYS)

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2021	1.92	1.84	1.71	2.19	2.19	2.38	2.34	2.22	2.42			
2020	1.75	1.87	2.23	2.39	1.91	1.92	1.65	1.75	2.19	1.81	1.97	1.94

REVPAR (AED)

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2021	84	91	99	101	89	93	87	87	105			
2020	166	126	73	40	43	41	50	87	61	75	76	104

ADR (AED)

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2021	181	160	181	169	167	155	164	157	180			
2020	222	182	164	136	131	139	156	209	136	160	145	190

KEY INDICATORS PER HOTEL TYPE

Table 5: Hotels performance by classification

★★★★★ 5-Star					
Number of Hotels: 11	Available Rooms	977			
	Occupancy	40%			
	ALOS	1.80			
	RevPAR	138			
	Top 5 Nationalities	**1)** UAE	**2)** Russia	**3)** India	**4)** Egypt	**5)** Oman

★★★★ 4-Star					
Number of Hotels: 23	Available Rooms	2,076			
	Occupancy	47%			
	ALOS	1.98			
	RevPAR	93			
	Top 5 Nationalities	**1)** UAE	**2)** Russia	**3)** India	**4)**Egypt	**5)** China

★★★ 3-Star					
Number of Hotels: 11	Available Rooms	1,367			
	Occupancy	74%			
	ALOS	2.55			
	RevPAR	101			
	Top 5 Nationalities	**1)** India	**2)** UAE	**3)** Pakistan	**4)** Egypt	**5)** Philippines

★★ 2-Star					
Number of Hotels: 9	Available Rooms	596			
	Occupancy	61%			
	ALOS	3.42			
	RevPAR	52			
	Top 5 Nationalities	**1)** India	**2)** Pakistan	**3)** UAE	**4)**Philippines	**5)** Egypt

★ 1-Star					
Number of Hotels: 10	Available Rooms	335			
	Occupancy	44%			
	ALOS	2.17			
	RevPAR	39			
	Top 5 Nationalities	**1)** India	**2)** Pakistan	**3)** Philippines	**4)**Bangladesh	**5)** Egypt

Deluxe					
Number of Hotels: 6	Available Rooms	751			
	Occupancy	62%			
	ALOS	3.12			
	RevPAR	101			
	Top 5 Nationalities	**1)** UAE	**2)** India	**3)** Iraq	**4)** Egypt	**5)** Oman

Standard					
Number of Hotels: 7	Available Rooms	656			
	Occupancy	62%			
	ALOS	1.94			
	RevPAR	102			
	Top 5 Nationalities	**1)** KSA	**2)** India	**3)** Iraq	**4)** Egypt	**5)** Philippines

| Basic					
Number of Hotels: 23	Available Rooms	779			
	Occupancy	56%			
	ALOS	3.06			
	RevPAR	64			
	Top 5 Nationalities	**1)** India	**2)** Egypt	**3)** Pakistan	**4)**Philippines	**5)** Syria

Jan to Sept -2021
Sharjah Hotel Guests

Table 6: Sharjah Tourism Main Indicators – from January to September 2021

Guest	Occupancy Rate%	ALOS (days)
824,712 ▲ 7%	55% ▲ 11%	2.12 ▲ 11%
Total Revenue	**RevPAR**	**ADR**
AED 251 M ▲ 17%	AED 93 ▲ 19%	AED 168 ▲ 2%

101 HOTEL
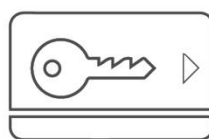
7,242 ROOMS

Table 7: Number of Hotels and rooms by star rating during Jan to Sept -2021

STAR RATING	5 STAR	4 STAR	1 - 3 STAR	APTS
	12	21	30	38
	977	1,975	2,201	2,089

Figure 10: top 5 source markets in Sharjah by nationality during Q1 – Q3 (2020 – 2021)

Top 5 Nationalities
(Hotel Establishments Guests)

■ 2020 ■ 2021

	UAE	India	Russia	Egypt	Pakistan
2020	139,385	78,733	113,106	43,189	33,419
2021	164,534	110,127	68,704	56,347	38,683
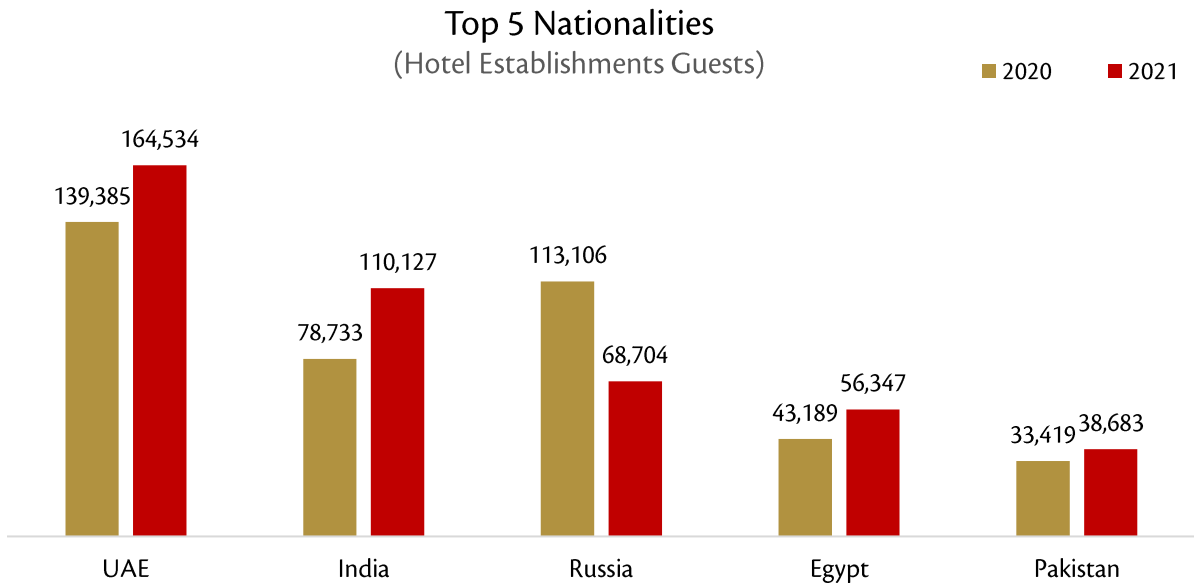
Figure 11: Hotel guests trends during Q1 to Q3 of (2020 – 2021)

Hotel Guests Trend

■ **2021** ─●─ 2020

Thousands

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
2021	94	92	109	84	86	92	86	91	91
2020	215	157	87	32	47	40	55	70	66
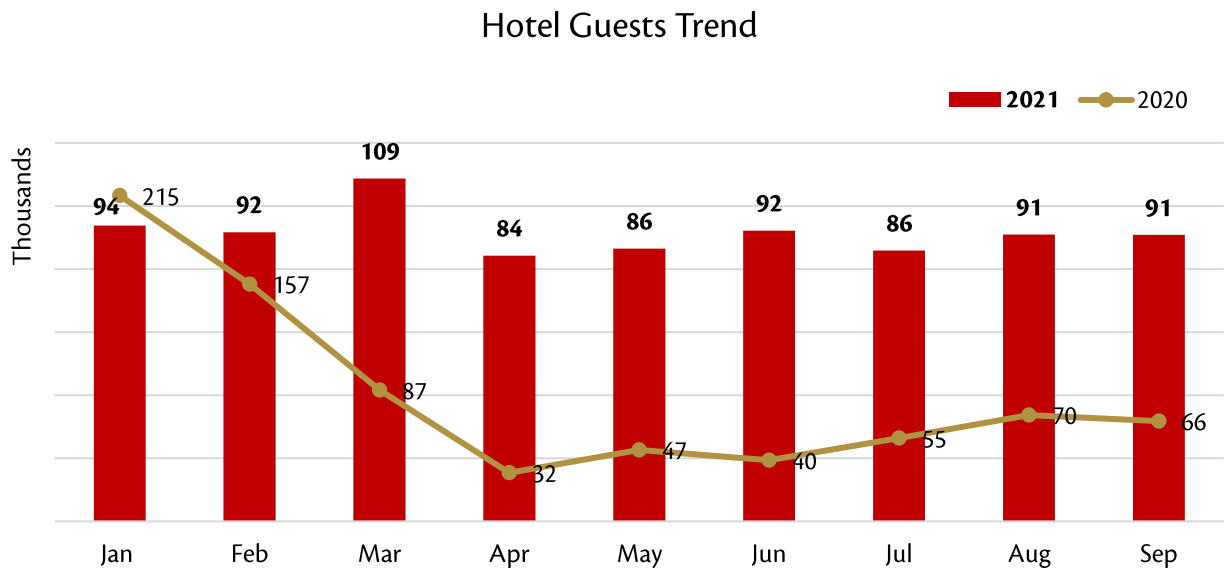
GLOSSARY

❖ **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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