

SHARJAH HOSPITALITY STATISTICS REPORT

Q3 – 2022

Strategy – Research & Statistics Division
Nov, 2022





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EXECUTIVE SUMMARY

This report provides thorough analyses on the performance of the tourism sector in Sharjah during third quarter of 2022 on different aspect of the industry compared to the same period of the previous year. Overall, the third quarter in 2022 witnessed improvements compared to same period last year. On one hand, guest arrivals grew by approximately 26% whereas occupancy levels in hotel establishments increased by 4%.

The total number of hotel guests visiting Sharjah during Q3 is approximately 338 thousand who stayed 726 thousand nights in Sharjah's accommodation, which makes about 2.15 nights per guest. Furthermore, the majority of those guests, about 20% of market share, are coming from Asia followed by Arabs (18%), GCC (16%), and Russia & CIS and UAE which accounted for 15% each. Domestic tourism still dominated the top source markets during third quarter with 15% of market share, and with 3% growth rate compared to Q3 in 2021. Similarly, a boom in the tourism inbound flow can be noticed in most source markets, especially for GCC where number of guests from Oman and Saudi Arabia has increase over the double with 266% and 146% increase respectively. Furthermore, hotels have made up over 83% of total revenue during Q3 in comparison to hotel apartments that only constituted about 17% of the total revenue.

The overall performance of Sharjah Tourism sector during the third quarter of 2022, reflected steadiness recovery and growth.

Sharjah Commerce and Tourism Development Authority





EXECUTIVE SUMMARY

Sharjah has over 10,600 rooms



3rd Quarter - 2022

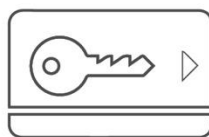
Sharjah Hotel Main Indicators

Table 1: Sharjah Tourism Main Indicators – Q3 2022 vs. Q3 2021

KEY PERFORMANCE INDICATORS	Guest	Occupancy Rate%	ALOS (days)
	337,816 ▲ 26%	60% ▲ 4%	2.15 ▼ 8%
	Total Revenue	RevPAR	ADR
	AED 108 Million ▲ 23%	AED 109 ▲ 17%	AED 181 ▲ 8%



**107
HOTEL**



**8,128
ROOMS Available**

Table 2: Average number of Operating Hotels and available rooms by star rating

STAR RATING	5 STAR	4 STAR	1 - 3 STAR	APTS
	12	21	34	40
	977	2,673	2,363	2,115





HOSPITALITY SECTOR PERFORMANCE

Figure 1: top 5 source markets in Sharjah by nationality during Q3 (2021 – 2022)

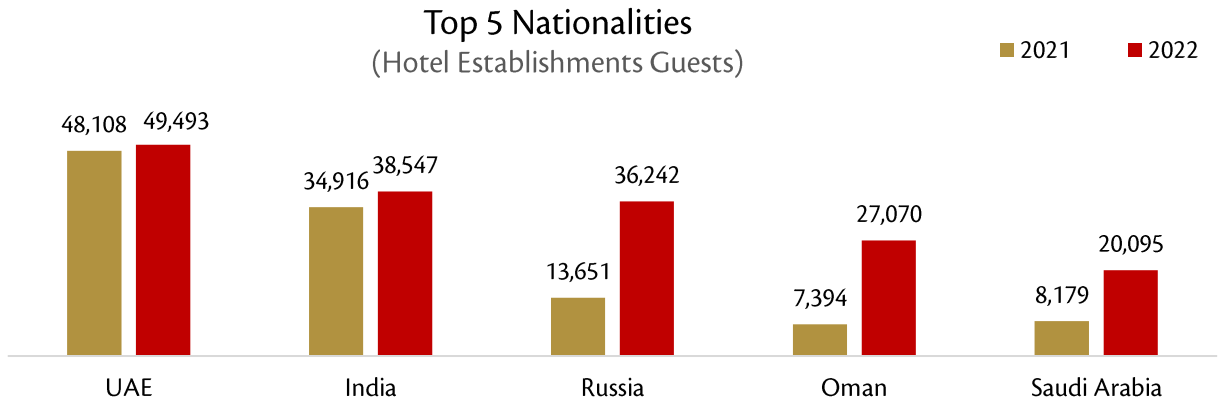


Figure 2: Hotel guests in Sharjah during third quarter 2021-2022

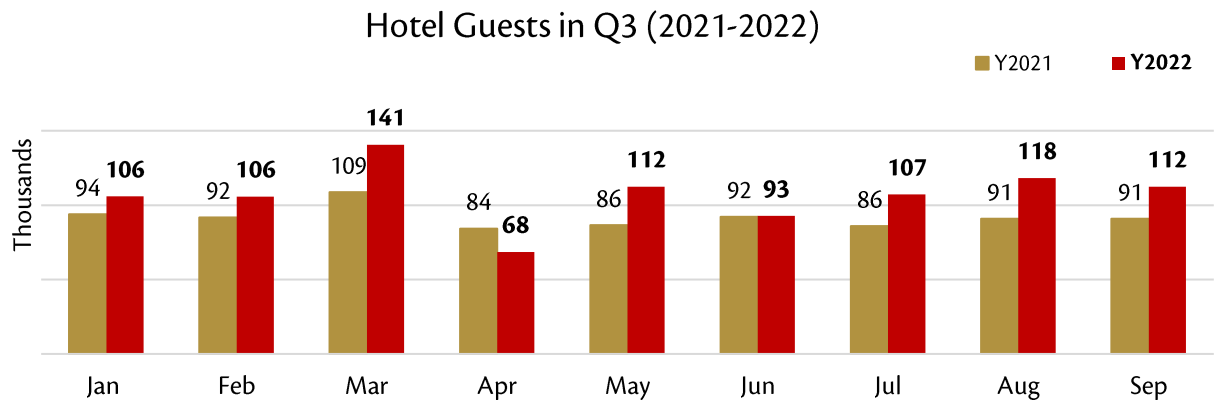
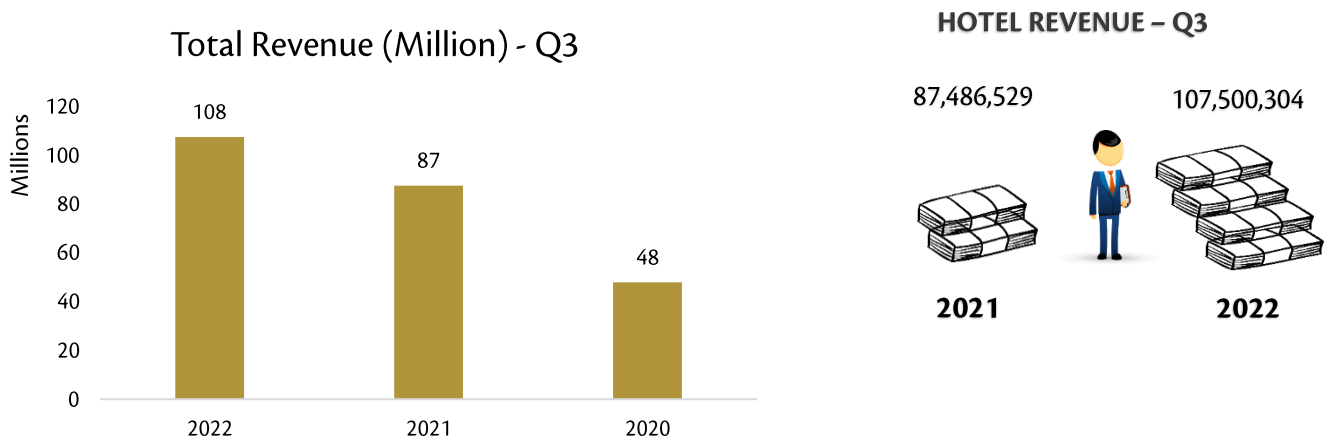


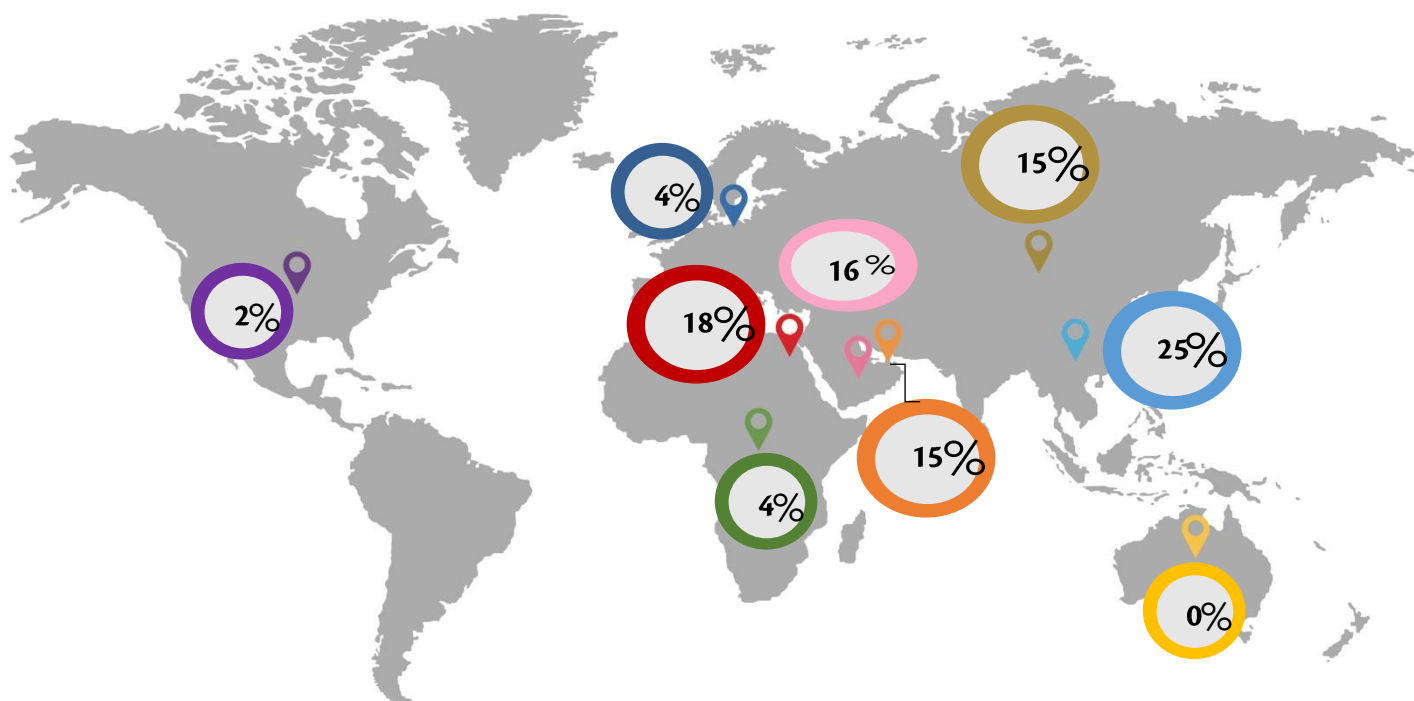
Figure 3: Hotel Establishments total revenue – Q3





KEY INDICATORS BY REGION

SHARE %



GROWTH %

	Russia, CIS & Baltics	103%	▲
	Americas	17%	▲
	GCC	157%	▲
	Arabs	3%	▲
	Europe Ex. Russia, CIS	7%	▲
	Asia	3%	▲
	Africa	17%	▲
	Australia & The Pacific	62%	▲
	UAE	3%	▲



TOP 20 SOURCE MARKETS

Figure 5: Market Share % for the Top 20 Source Markets during Q3 - 2022.

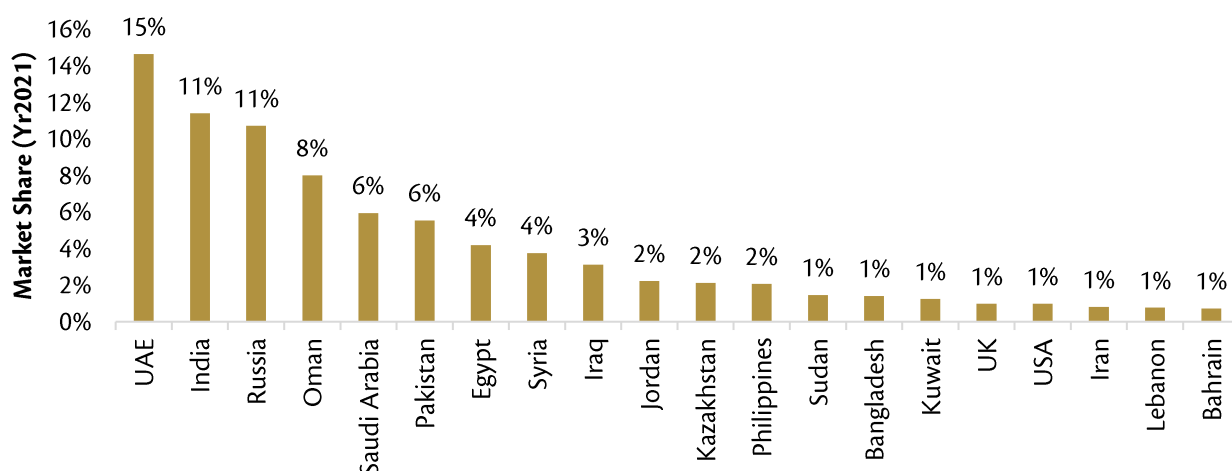
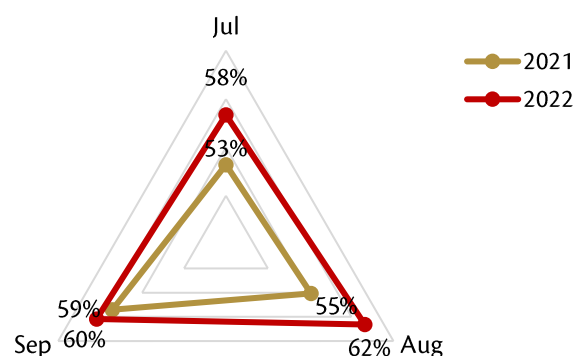


Table 3: Top 20 source markets

Rank	Market	ALOS Nights	Nights Number	Change %
1	UAE	1.60	79,103	3%
2	India	2.16	83,382	10%
3	Russia	3.01	109,077	165%
4	Oman	1.37	37,108	266%
5	Saudi Arabia	1.56	31,414	146%
6	Pakistan	1.73	32,353	45%
7	Egypt	2.36	33,441	-18%
8	Syria	2.29	28,991	56%
9	Iraq	3.55	37,461	24%
10	Jordan	2.34	17,537	-10%
11	Kazakhstan	3.25	23,348	54%
12	Philippines	2.58	18,042	-43%
13	Sudan	2.47	12,186	-5%
14	Bangladesh	1.59	7,572	68%
15	Kuwait	2.45	10,288	8%
16	UK	2.10	7,003	10%
17	USA	2.66	8,803	17%
18	Iran	2.56	7,030	17%
19	Lebanon	2.52	6,569	32%
20	Bahrain	2.08	5,034	63%

Figure 6: Average Occupancy Rate - Q3

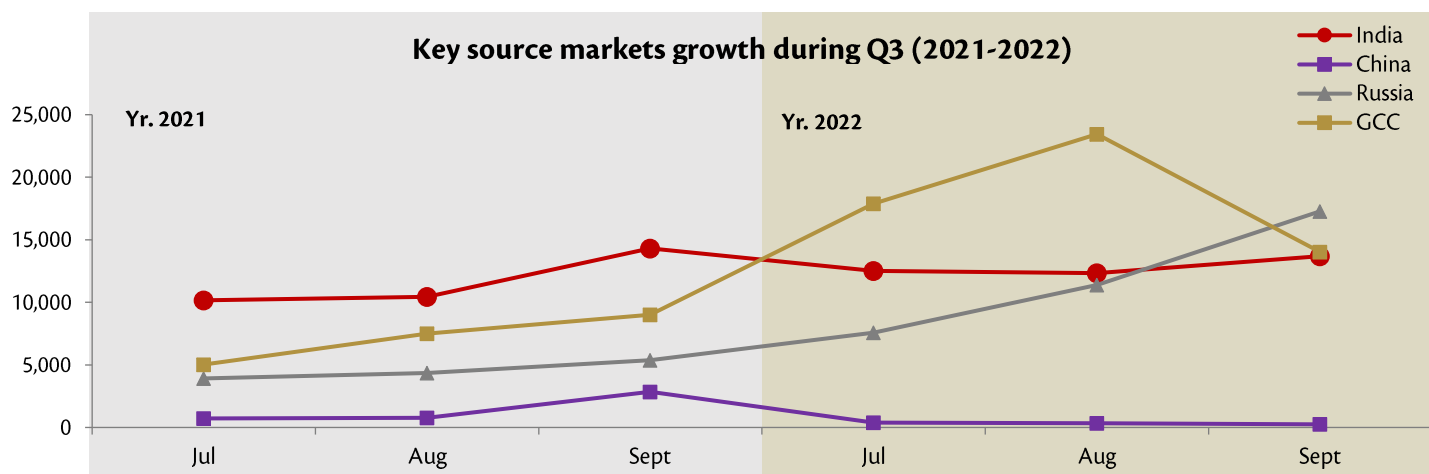


KEY SOURCE MARKETS PERFORMANCE

Table 4: Key source markets performance

India	Guest		Growth%		2022 %Share	Guest Night		Growth%	
Month	Yr2021	Yr2022				Yr2021	Yr2022		
Jul	10,164	12,522	▲	23%	12%	23,945	27,801	▲	16%
Aug	10,437	12,324	▲	18%	10%	23,747	27,205	▲	15%
Sept	14,315	13,701	▼	-4%	12%	47,948	28,376	▼	-41%
Q3	34,916	38,547	▲	10%	11%	95,640	83,382	▼	-13%
China	Guest		Growth%		2022 %Share	Guest Night		Growth%	
Month	Yr2021	Yr2022				Yr2021	Yr2022		
Jul	717	387	▼	-46%	0%	1,350	811	▼	-40%
Aug	772	324	▼	-58%	0%	2,598	1,018	▼	-61%
Sept	2,850	250	▼	-91%	0%	1,416	485	▼	-66%
Q3	4,339	961	▼	-78%	0%	5,364	2,314	▼	-57%
Russia	Guest		Growth%		2022 %Share	Guest Night		Growth%	
Month	Yr2021	Yr2022				Yr2021	Yr2022		
Jul	3,919	7,578	▲	93%	7%	11,915	27,280	▲	129%
Aug	4,356	11,384	▲	161%	10%	11,301	35,142	▲	211%
Sept	5,376	17,280	▲	221%	15%	14,357	46,655	▲	225%
Q3	13,651	36,242	▲	165%	11%	37,573	109,077	▲	190%
GCC	Guest		Growth%		2022 %Share	Guest Night		Growth%	
Month	Yr2021	Yr2022				Yr2021	Yr2022		
Jul	5,030	17,880	▲	255%	17%	9,187	29,073	▲	216%
Aug	7,511	23,444	▲	212%	20%	12,742	37,525	▲	194%
Sept	9,022	14,016	▲	55%	12%	16,177	20,552	▲	27%
Q3	21,563	55,340	▲	157%	16%	38,106	87,150	▲	129%

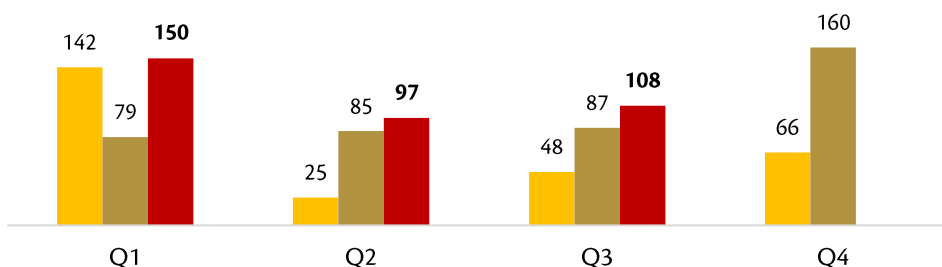
*All GCC countries excluding UAE



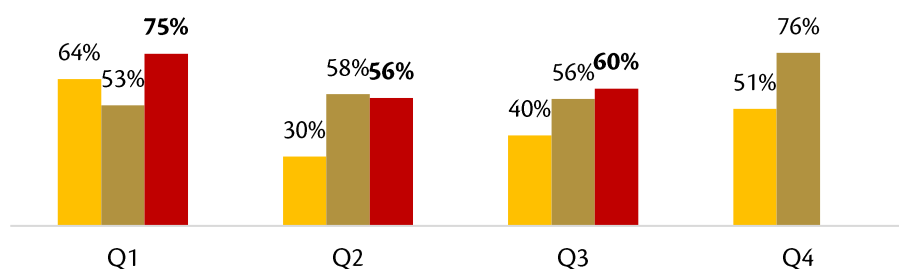
SECTOR PERFORMANCE – KEY INDICATORS (QUARTERLY)

2020 2021 2022

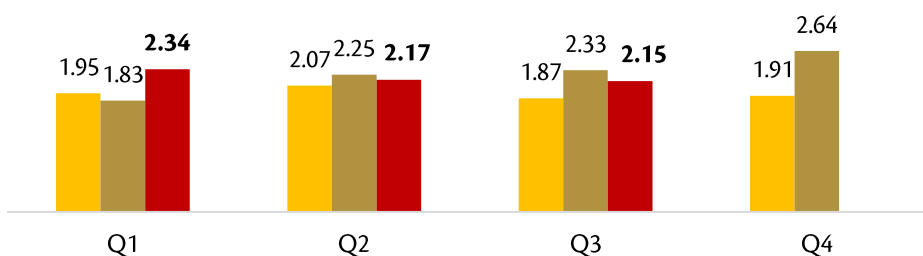
Revenue (AED Million)



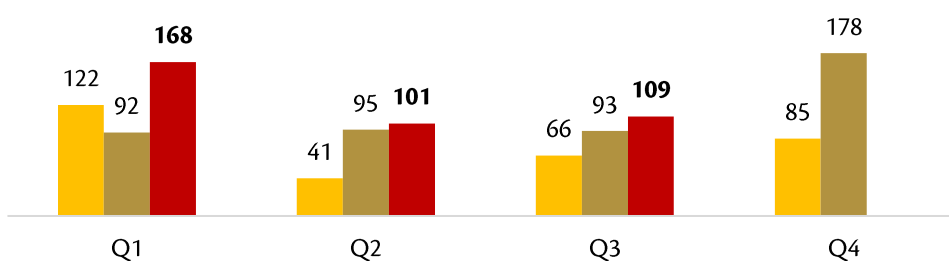
Occupancy %



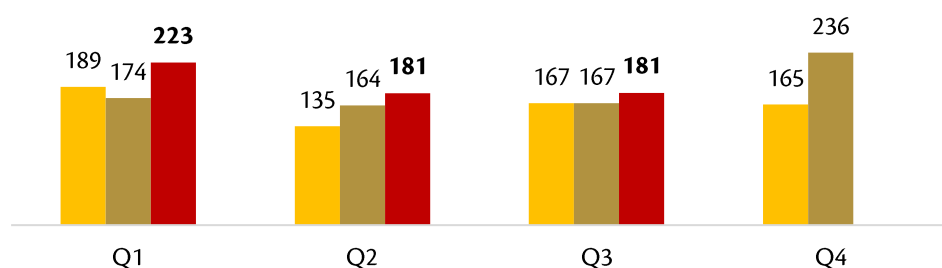
ALOS (DAYS)



REVPAR (AED)

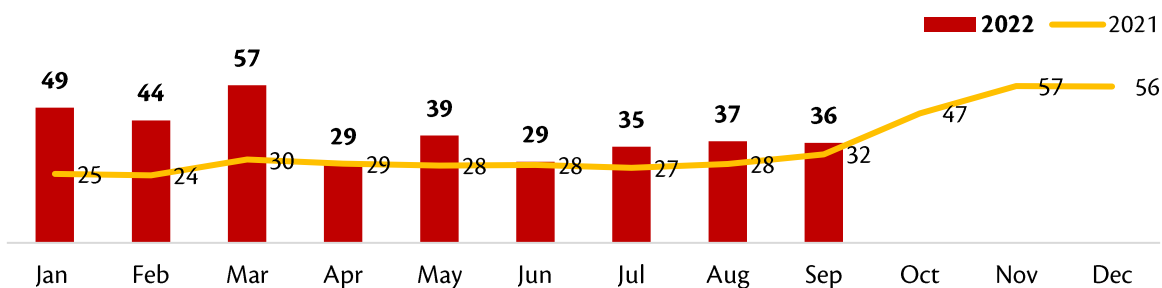


ADR (AED)

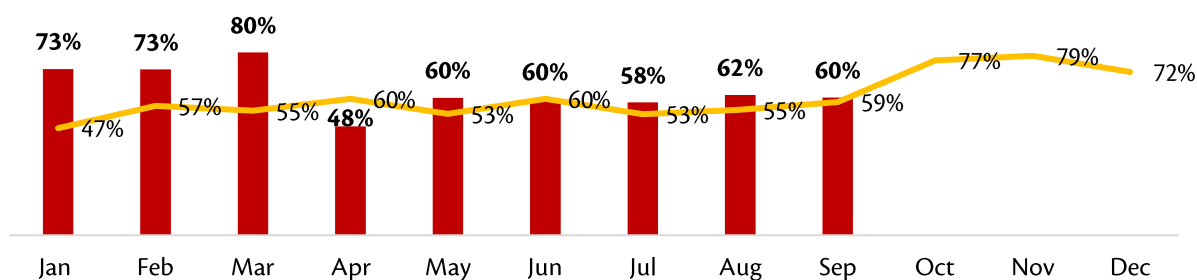


SECTOR PERFORMANCE – KEY INDICATORS (MONTHLY)

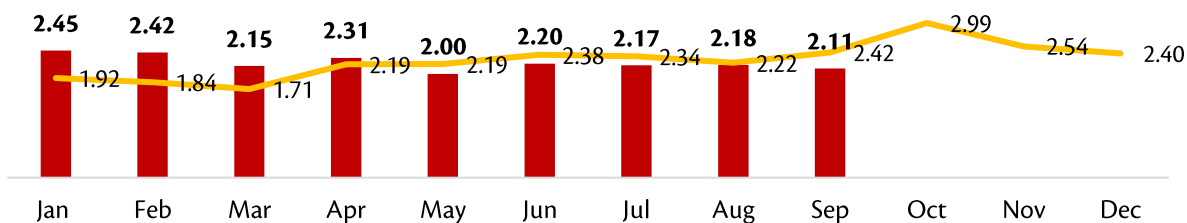
Revenue
(AED Million)



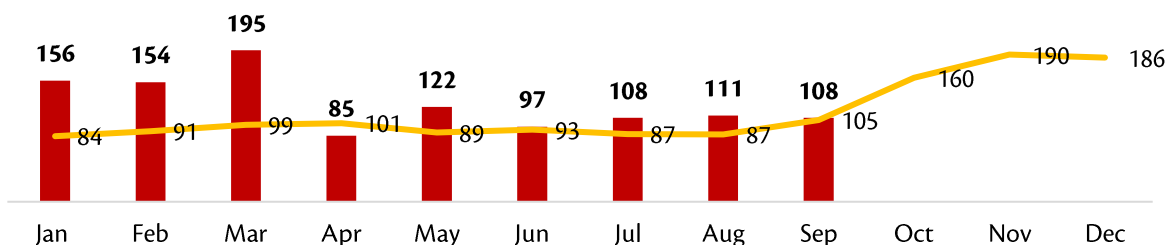
Occupancy %



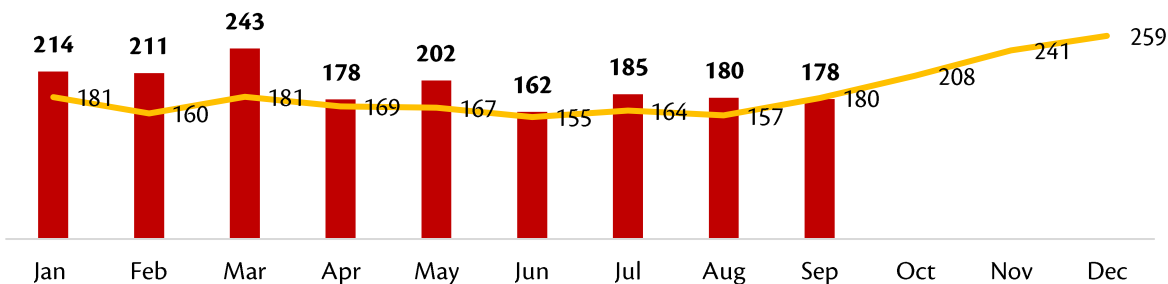
ALOS
(DAYS)



REVPAR
(AED)



ADR
(AED)





KEY INDICATORS PER HOTEL TYPE



Table 5: Hotels performance by classification during Q3

★★★★★ 5-Star	Available Rooms	977				
	Occupancy	54%				
Number of Hotels:	ALOS	1.96				
12	RevPAR	173				
	Top 5 Nationalities	1) UAE	2) Russia	3) Oman	4) KSA	5) Kazakhstan
★★★★★	Available Rooms	2,673				
4-Star	Occupancy	65%				
Number of Hotels:	ALOS	2.12				
21	RevPAR	120				
	Top 5 Nationalities	1) Russia	2) UAE	3) Oman	4) India	5) KSA
★★★	Available Rooms	1,461				
3-Star	Occupancy	61%				
Number of Hotels:	ALOS	2.19				
13	RevPAR	102				
	Top 5 Nationalities	1) India	2) Oman	3) KSA	4) Pakistan	5) UAE
★★	Available Rooms	620				
2-Star	Occupancy	59%				
Number of Hotels:	ALOS	2.20				
11	RevPAR	67				
	Top 5 Nationalities	1) India	2) Pakistan	3) Oman	4) KSA	5) UAE
★	Available Rooms	282				
1-Star	Occupancy	47%				
Number of Hotels:	ALOS	1.89				
10	RevPAR	47				
	Top 5 Nationalities	1) India	2) Pakistan	3) Bangladesh	4) Oman	5) Philippines
	Available Rooms	811				
Deluxe	Occupancy	60%				
Number of Hotels:	ALOS	2.34				
7	RevPAR	106				
	Top 5 Nationalities	1) UAE	2) KSA	3) India	4) Oman	5) Iraq
	Available Rooms	578				
Standard	Occupancy	59%				
Number of Hotels:	ALOS	2.14				
8	RevPAR	99				
	Top 5 Nationalities	1) India	2) Iraq	3) Egypt	4) Pakistan	5) Oman
	Available Rooms	726				
Basic	Occupancy	57%				
Number of Hotels:	ALOS	2.46				
25	RevPAR	65				
	Top 5 Nationalities	1) India	2) Pakistan	3) Egypt	4) Syria	5) Oman





EXECUTIVE Year to Date SUMMARY (Q1 – Q3) 2022



Jan to Sept - 2022

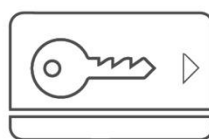
Sharjah Hotel Guests

Table 6: Sharjah Tourism Main Indicators – Quarters (1 to 3) 2022 vs. 2021

KEY PERFORMANCE INDICATORS	Guest	Occupancy Rate%	ALOS (days)
	963,549 ▲ 17%	64% ▲ 9%	2.21 ▲ 4%
	Total Revenue	RevPAR	ADR
	AED 354 M ▲ 41%	AED 126 ▲ 36%	AED 195 ▲ 16%



**105
HOTEL**



**7,889
ROOMS Available**

Table 7: Average number of Operating Hotels and available rooms by star rating

STAR RATING	5 STAR	4 STAR	1 - 3 STAR	APTS
	12	21	33	39
	961	2,483	2,401	2,044
NOTE	Sharjah has over 10,600 rooms			





HOSPITALITY SECTOR PERFORMANCE

Figure 10: top 5 source markets in Sharjah by nationality during Quarters 1 to 3 (2021 – 2022)

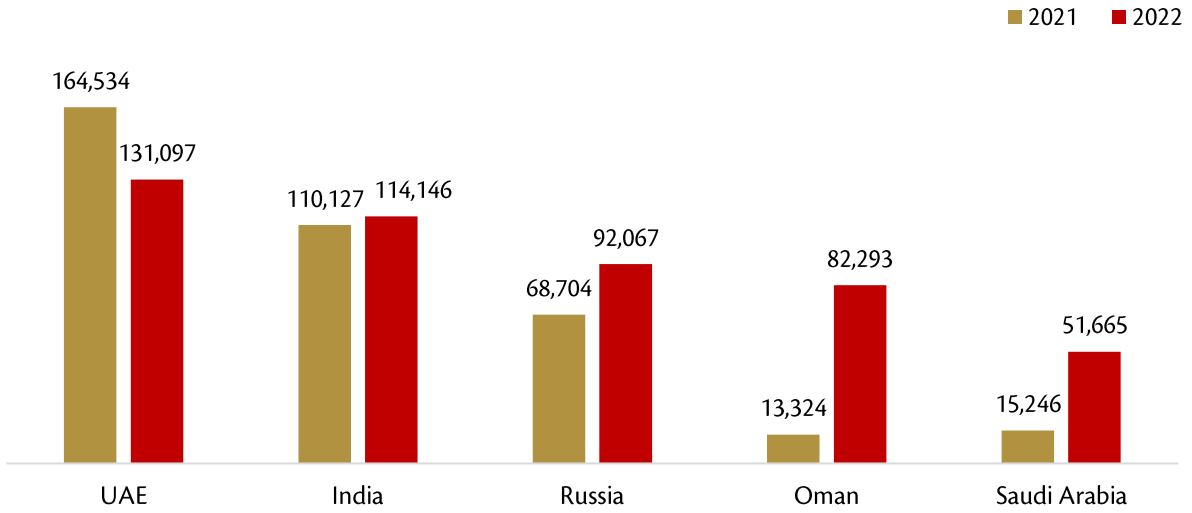
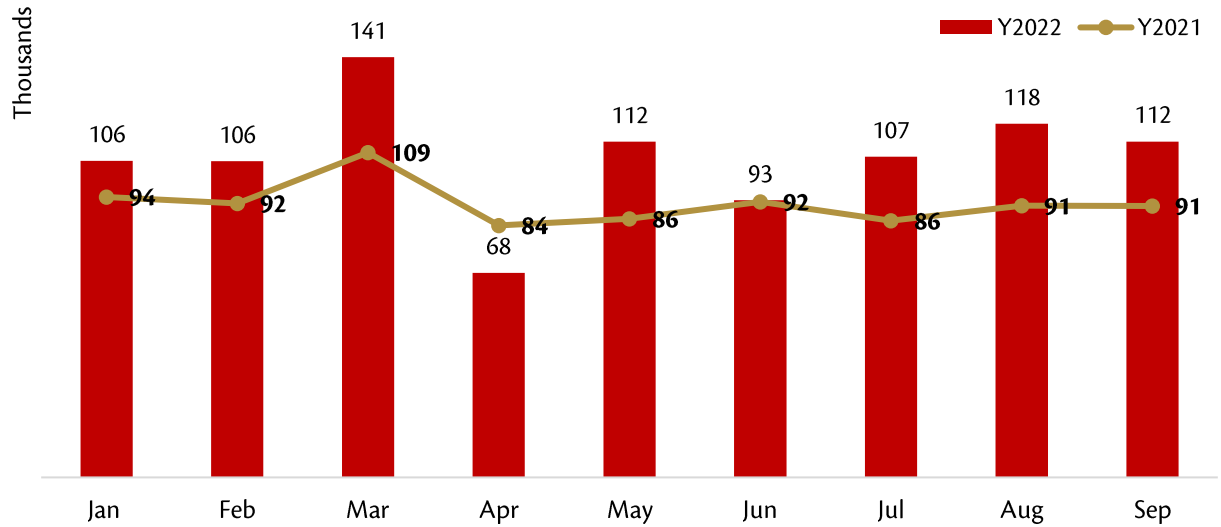


Figure 11: Hotel guests trend during first half of (2021 – 2022)





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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