SHARJAH HOSPITALITY
STATISTICS REPORT
Q4 – 2022

Strategy – Research & Statistics Division
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EXECUTIVE SUMMARY

This report provides thorough analyses on the performance of the tourism sector in Sharjah during fourth quarter of 2022 on different aspect of the industry compared to the same period of the previous year. Moreover, the data presented in this report are collected monthly from hotel establishments operating in the emirate of Sharjah. Hence, some figures might be subject to change quarterly depending on changes from source. These changes will be reflected in the next issue and will be notified in the notes.

Overall, the last quarter in 2022 witnessed improvements compared to same period last year. On one hand, guest arrivals grew by approximately 13% consequently total revenue in hotel establishments increased by 8%.

The total number of hotel guests visiting Sharjah during Q4 exceeded the 400 thousand who stayed over three million nights in Sharjah's accommodation establishments of all classifications. Furthermore, the Russia & CIS region witnessed an overall growth in guests by 51% with total market share of 24%. Additionally, the GCC region has also grew by 34% and occupying a market share of 14%. Noticeably, Russian source market has dominated the top 5 nationalities in all of the hotel establishments classifications during Q4, and registering a growth of 73% with 18% market share alone. Furthermore, while two-star hotels registered the highest occupancy levels of 75% in the market during Q4, three-star hotels registered the longest average length of stay of 2.47 nights per guest. On the other hand, 5-star hotels recorded the highest average daily rates and RevPAR of 408 and 289 respectively among all establishments.

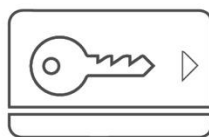**Sharjah Commerce and Tourism Development Authority**

4th Quarter - 2022

Sharjah Hotel Main Indicators

Table 1: Sharjah Tourism Main Indicators – Q4 2022 vs. Q4 2021

	Guest	Occupancy Rate%	ALOS (days)
KEY PERFORMANCE INDICATORS	400,883 ▲ 13%	71% ▼ 5%	2.27 ▼ 14%
	Total Revenue	**RevPAR**	**ADR**
	AED **173** Million ▲ 8%	AED **172** ▼ 3%	AED **241** ▲ 2%

109 HOTEL

8,378 ROOMS Available

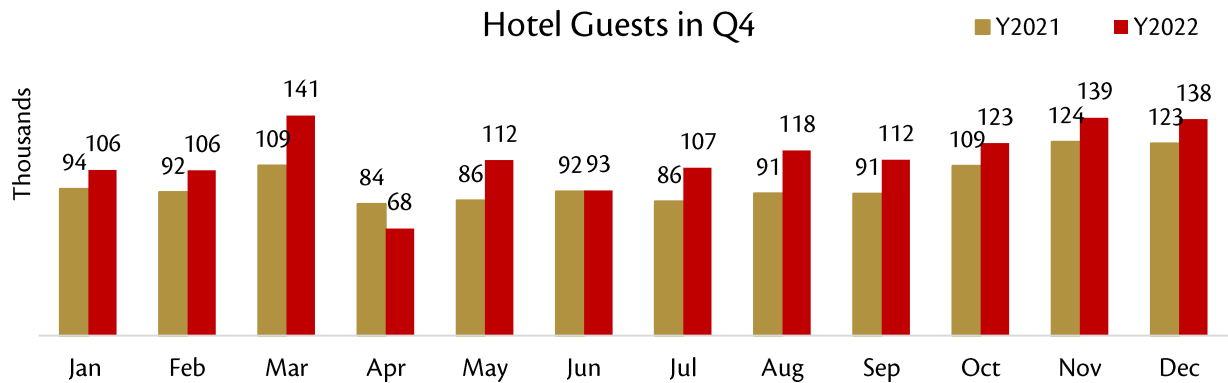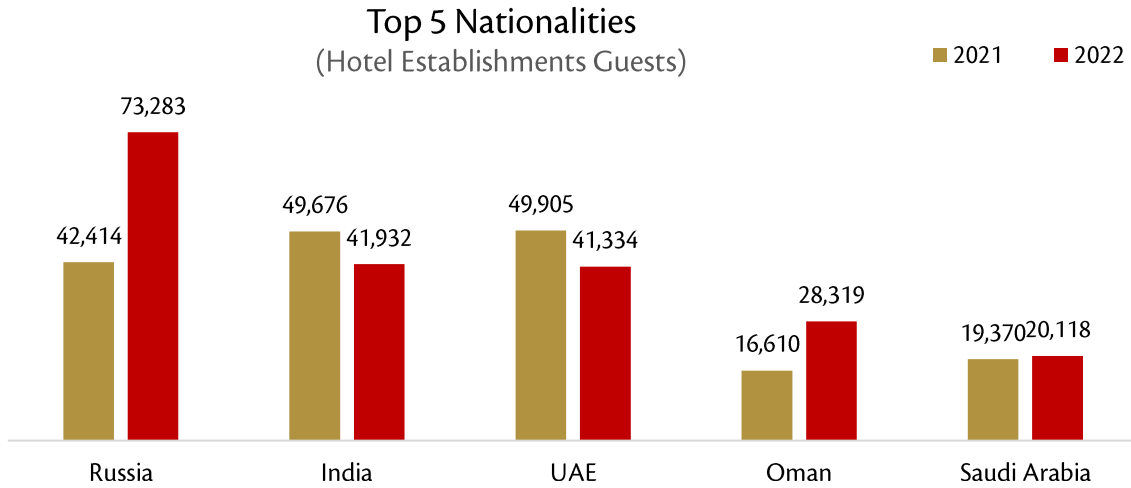**Table 2**: Average number of Operating Hotels and available rooms by star rating

	5 STAR	4 STAR	1 - 3 STAR	APTS
STAR RATING	12	21	35	41
	977	2,819	2,383	2,199

NOTE	Sharjah has over 10,600 rooms

HOSPITALITY SECTOR PERFORMANCE

Figure 1: top 5 source markets in Sharjah by nationality during Q4 (2021 – 2022)

Top 5 Nationalities
(Hotel Establishments Guests)

■ 2021 ■ 2022

Nationality	2021	2022
Russia	42,414	73,283
India	49,676	41,932
UAE	49,905	41,334
Oman	16,610	28,319
Saudi Arabia	19,370	20,118

Hotel Guests in Q4

■ Y2021 ■ Y2022

Thousands

Month	Y2021	Y2022
Jan	94	106
Feb	92	106
Mar	109	141
Apr	84	68
May	86	112
Jun	92	93
Jul	86	107
Aug	91	118
Sep	91	112
Oct	109	123
Nov	124	139
Dec	123	138

Figure 3: Hotel Establishments total revenue – Q4

Total Revenue (Million) - Q4

Year	Revenue
2020	66
2021	160
2022	173

HOTEL REVENUE – Q4

2021	2022
159,865,610	172,800,863
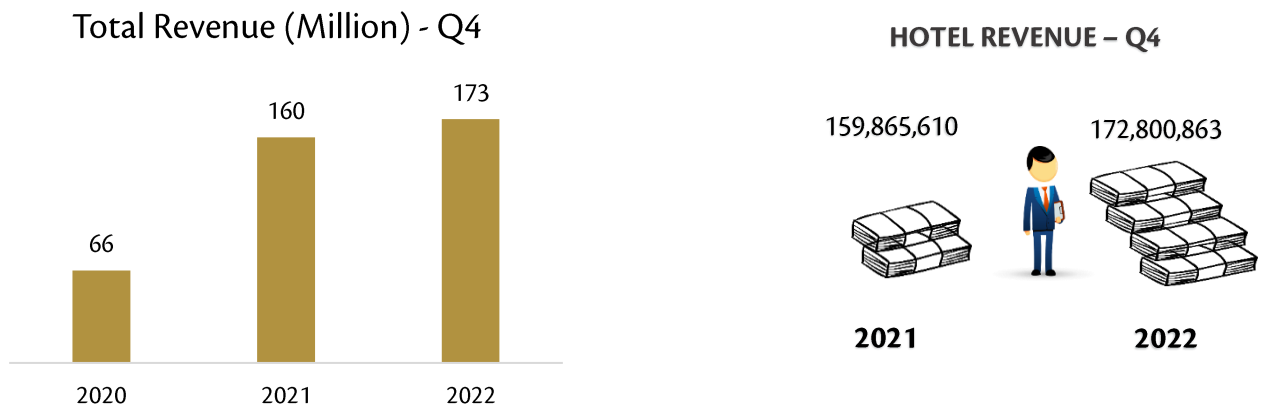
KEY INDICATORS BY REGION

SHARE %

- 7%
- 24%
- 14%
- 3%
- 16%
- 22%
- 3%
- 10%
- 0%

GROWTH %

Region	Growth	
Russia, CIS & Baltics	51%	▲
Americas	38%	▲
GCC	34%	▲
Arabs	14%	▲
Europe Ex.Russia, CIS	4%	▲
Asia	9%	▼
Africa	31%	▲
Australia & The Pacific	103%	▲
UAE	3%	▼
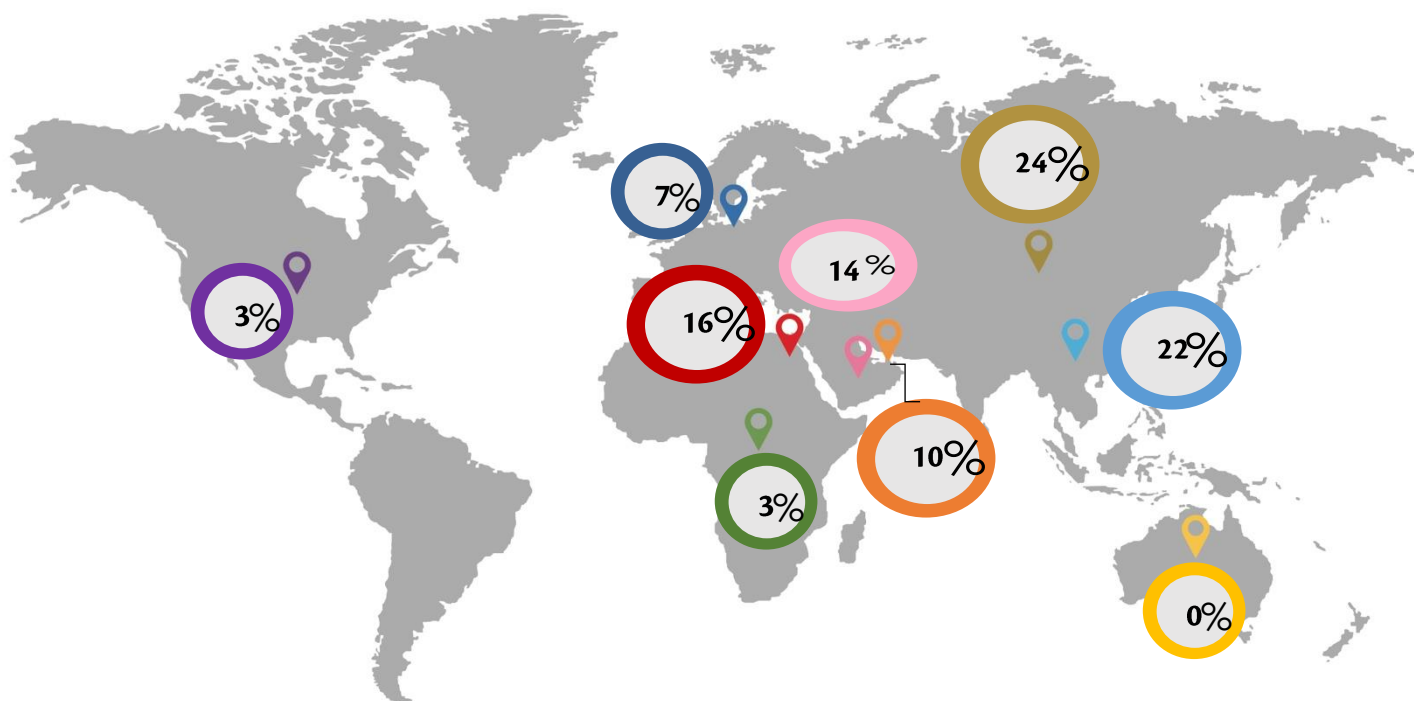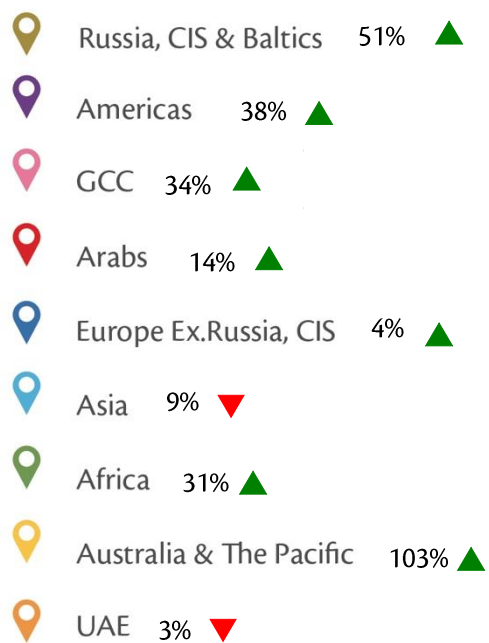
TOP 20 SOURCE MARKETS

Figure 5: Market Share % for the Top 20 Source Markets during Q4 - 2022.
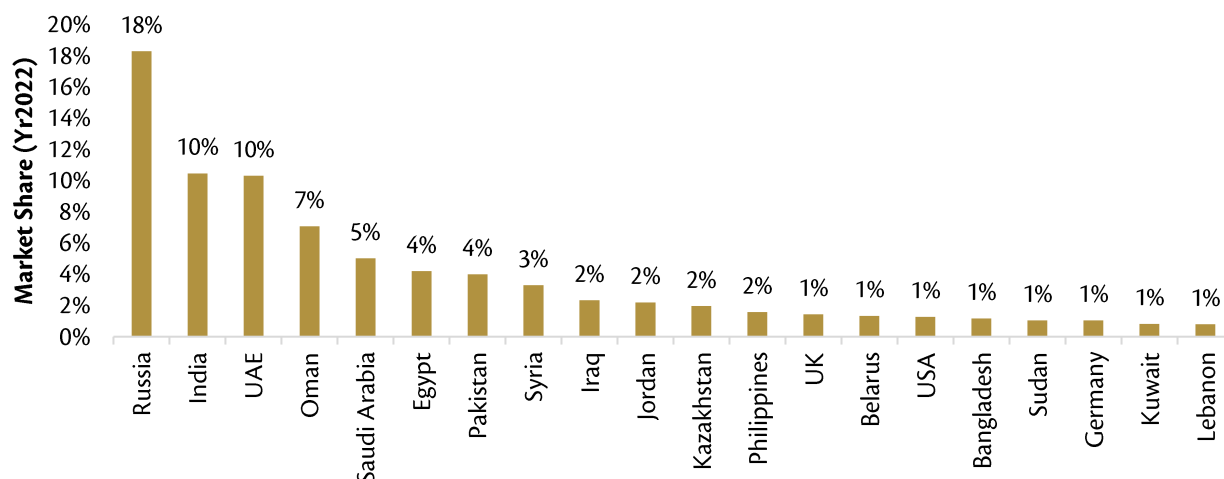

Table 3: Top 20 source markets

Rank	Market	ALOS Nights	Nights Number	Change %
1	Russia	2.92	213,880	73%
2	India	1.99	83,625	-16%
3	UAE	1.86	76,792	-17%
4	Oman	1.45	41,085	70%
5	Saudi Arabia	1.96	39,369	4%
6	Egypt	2.57	43,314	-12%
7	Pakistan	1.81	29,052	-5%
8	Syria	2.14	28,362	65%
9	Iraq	3.50	32,889	25%
10	Jordan	2.13	18,693	10%
11	Kazakhstan	3.46	27,281	4%
12	Philippines	1.98	12,476	-13%
13	UK	2.07	11,896	18%
14	Belarus	3.13	16,820	136%
15	USA	2.36	12,009	10%
16	Bangladesh	1.67	7,734	46%
17	Sudan	2.28	9,530	36%
18	Germany	2.12	8,781	2%
19	Kuwait	2.27	7,445	7%
20	Lebanon	2.53	8,079	-9%

*change% based on guest numbers compared to 2021
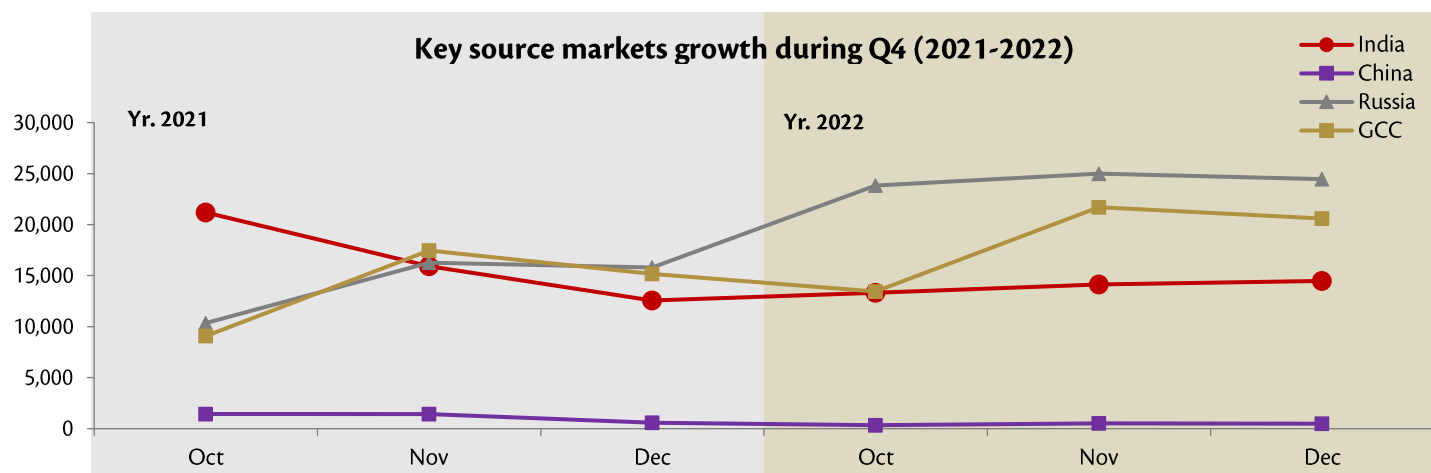
Figure 6: Average Occupancy Rate - Q4
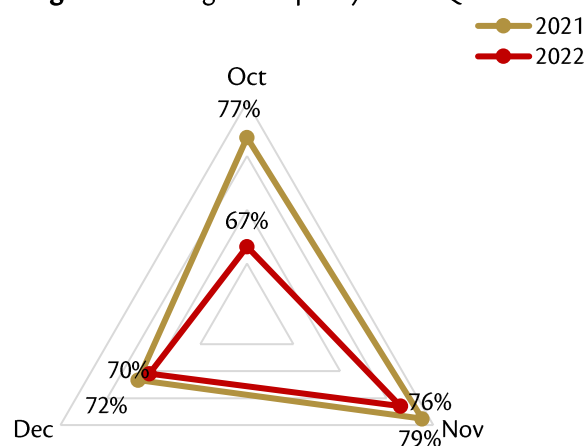
KEY SOURCE MARKETS PERFORMANCE

Table 4: Key source markets performance

India	Guest		Growth%		2022 %Share	Guest Night		Growth%	
Month	Yr2021	Yr2022				Yr2021	Yr2022		
Oct	21,189	13,324	▼	-37%	11%	90,508	28,823	▼	-68%
Nov	15,926	14,143	▼	-11%	10%	63,034	26,898	▼	-57%
Dec	12,561	14,465	▲	15%	10%	34,712	27,904	▼	-20%
Q4	**49,676**	**41,932**	▼	**-16%**	**10%**	**188,254**	**83,625**	▼	**-56%**
China	Guest		Growth%		2022 %Share	Guest Night		Growth%	
Month	Yr2021	Yr2022				Yr2021	Yr2022		
Oct	1,441	343	▼	-76%	0%	2,584	826	▼	-68%
Nov	1,425	516	▼	-64%	0%	2,468	1,081	▼	-56%
Dec	580	497	▼	-14%	0%	1,143	975	▼	-15%
Q4	**3,446**	**1,356**	▼	**-61%**	**0%**	**6,195**	**2,882**	▼	**-53%**
Russia	Guest		Growth%		2022 %Share	Guest Night		Growth%	
Month	Yr2021	Yr2022				Yr2021	Yr2022		
Oct	10,351	23,843	▲	130%	19%	33,015	61,731	▲	87%
Nov	16,255	24,995	▲	54%	18%	44,311	71,268	▲	61%
Dec	15,808	24,445	▲	55%	18%	44,130	80,881	▲	83%
Q4	**42,414**	**73,283**	▲	**73%**	**18%**	**121,456**	**213,880**	▲	**76%**
GCC	Guest		Growth%		2022 %Share	Guest Night		Growth%	
Month	Yr2021	Yr2022				Yr2021	Yr2022		
Oct	9,076	13,434	▲	48%	11%	14,657	22,052	▲	50%
Nov	17,475	21,705	▲	24%	16%	28,598	38,541	▲	35%
Dec	15,182	20,594	▲	36%	15%	25,922	36,191	▲	40%
Q4	**41,733**	**55,733**	▲	**34%**	**14%**	**69,177**	**96,784**	▲	**40%**

*All GCC countries excluding UAE

Key source markets growth during Q4 (2021-2022)

SECTOR PERFORMANCE –
KEY INDICATORS (QUARTERLY)

Legend: ■ 2020 ■ 2021 ■ **2022**

Revenue
(AED Million)

	Q1	Q2	Q3	Q4
2020	142	25	48	66
2021	79	85	87	160
2022	**150**	**97**	**108**	**173**

Occupancy %

	Q1	Q2	Q3	Q4
2020	64%	30%	40%	51%
2021	53%	58%	56%	76%
2022	**75%**	**56%**	**60%**	**71%**

ALOS
(DAYS)

	Q1	Q2	Q3	Q4
2020	1.95	2.07	1.87	1.91
2021	1.83	2.25	2.33	2.64
2022	**2.34**	**2.17**	**2.15**	**2.27**

REVPAR
(AED)

	Q1	Q2	Q3	Q4
2020	122	41	66	85
2021	92	95	93	178
2022	**168**	**101**	**109**	**172**

ADR
(AED)

	Q1	Q2	Q3	Q4
2020	189	135	167	165
2021	174	164	167	236
2022	**223**	**181**	**181**	**241**
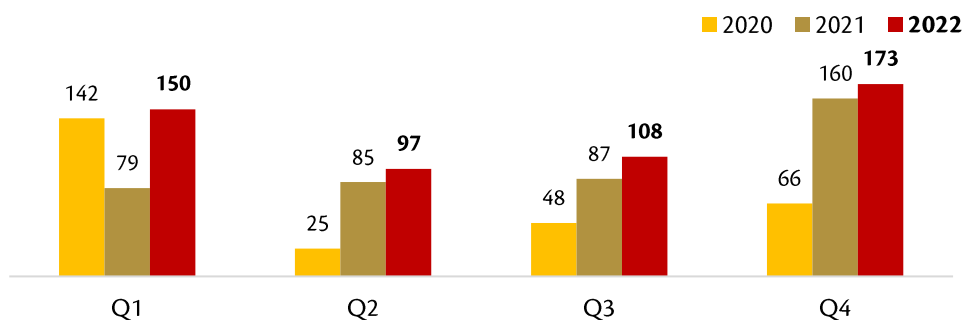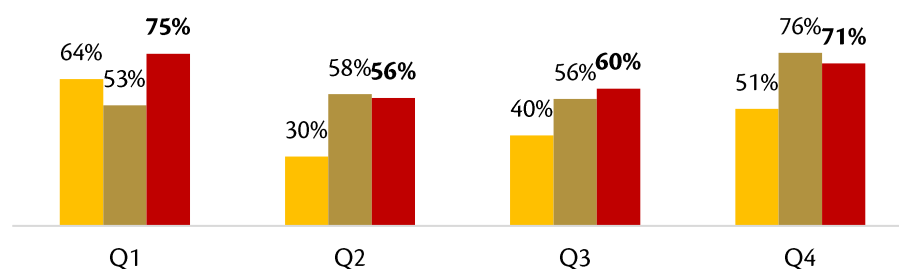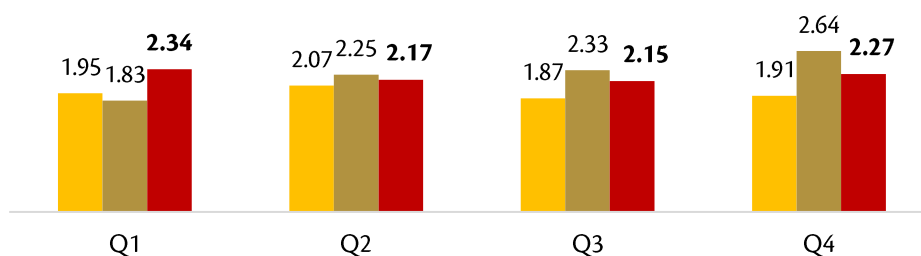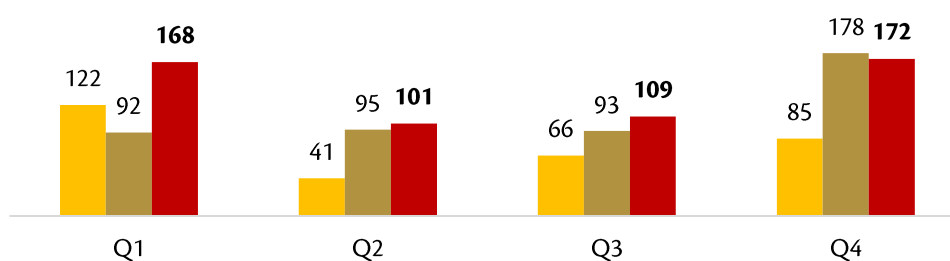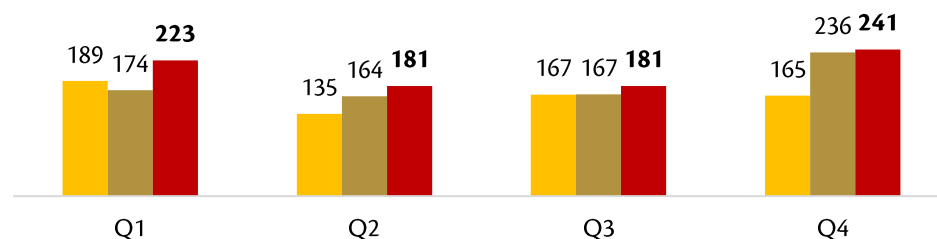
SECTOR PERFORMANCE – KEY INDICATORS (MONTHLY)

Legend: **2022** (bars) | 2021 (line)

Revenue (AED Million)

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2022	49	44	57	29	39	29	35	37	36	45	63	66
2021	25	24	30	29	28	28	27	28	32	47	57	56

Occupancy %

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2022	73%	73%	80%	48%	60%	60%	58%	62%	60%	67%	76%	70%
2021	47%	57%	55%	60%	53%	60%	53%	55%	59%	77%	79%	72%

ALOS (DAYS)

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2022	2.45	2.42	2.15	2.31	2.00	2.20	2.17	2.18	2.11	2.20	2.25	2.35
2021	1.92	1.84	1.71	2.19	2.19	2.38	2.34	2.22	2.42	2.99	2.54	2.40

REVPAR (AED)

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2022	156	154	195	85	122	97	108	111	108	140	189	187
2021	84	91	99	101	89	93	87	87	105	160	190	186

ADR (AED)

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2022	214	211	243	178	202	162	185	180	178	210	247	265
2021	181	160	181	169	167	155	164	157	180	208	241	259

KEY INDICATORS PER HOTEL TYPE

Table 5: Hotels performance by classification during Q4

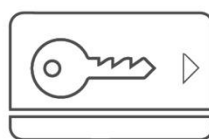| ★★★★★ 5-Star	Available Rooms	977				
Number of Hotels: 12	Occupancy	71%				
	ALOS	2.19				
	RevPAR	289				
	Top 5 Nationalities	**1**) Russia	**2**) UAE	**3**) India	**4**) KSA	**5**)Oman
★★★★ 4-Star	Available Rooms	2,819				
Number of Hotels: 21	Occupancy	72%				
	ALOS	2.22				
	RevPAR	196				
	Top 5 Nationalities	**1**) Russia	**2**) UAE	**3**)Oman	**4**) India	**5**) KSA
★★★ 3-Star	Available Rooms	1,474				
Number of Hotels: 14	Occupancy	72%				
	ALOS	2.47				
	RevPAR	159				
	Top 5 Nationalities	**1**) India	**2**) Russia	**3**)Oman	**4**) KSA	**5**) Pakistan
★★ 2-Star	Available Rooms	603				
Number of Hotels: 11	Occupancy	75%				
	ALOS	2.39				
	RevPAR	95				
	Top 5 Nationalities	**1**) India	**2**) Oman	**3**) Pakistan	**4**) UAE	**5**) Russia
★ 1-Star	Available Rooms	306				
Number of Hotels: 10	Occupancy	61%				
	ALOS	2.18				
	RevPAR	75				
	Top 5 Nationalities	**1**) India	**2**) Pakistan	**3**)Bangladesh	**4**) Oman	**5**) Russia
Deluxe	Available Rooms	811				
Number of Hotels: 7	Occupancy	71%				
	ALOS	2.29				
	RevPAR	148				
	Top 5 Nationalities	**1**) UAE	**2**) India	**3**) KSA	**4**) Oman	**5**) Russia
Standard	Available Rooms	667				
Number of Hotels: 8	Occupancy	65%				
	ALOS	1.97				
	RevPAR	145				
	Top 5 Nationalities	**1**) India	**2**) Egypt	**3**) Oman	**4**) KSA	**5**) Russia
Basic	Available Rooms	721				
Number of Hotels: 26	Occupancy	73%				
	ALOS	2.47				
	RevPAR	104				
	Top 5 Nationalities	**1**) India	**2**) Oman	**3**) Pakistan	**4**) Egypt	**5**)Russia

Jan to Dec - 2022
Sharjah Hotel Guests

Table 6: Sharjah Tourism Main Indicators – Quarters (1 to 4) 2022 vs. 2021

KEY PERFORMANCE INDICATORS	Guest	Occupancy Rate%	ALOS (days)
	1,364,432 ▲ 17%	66% ▲ 5%	2.23 ▼ 2%
	Total Revenue	**RevPAR**	**ADR**
	AED 527 M ▲ 28%	AED 140 ▲ 20%	AED 210 ▲ 11%

107 HOTEL

8,011 ROOMS Available

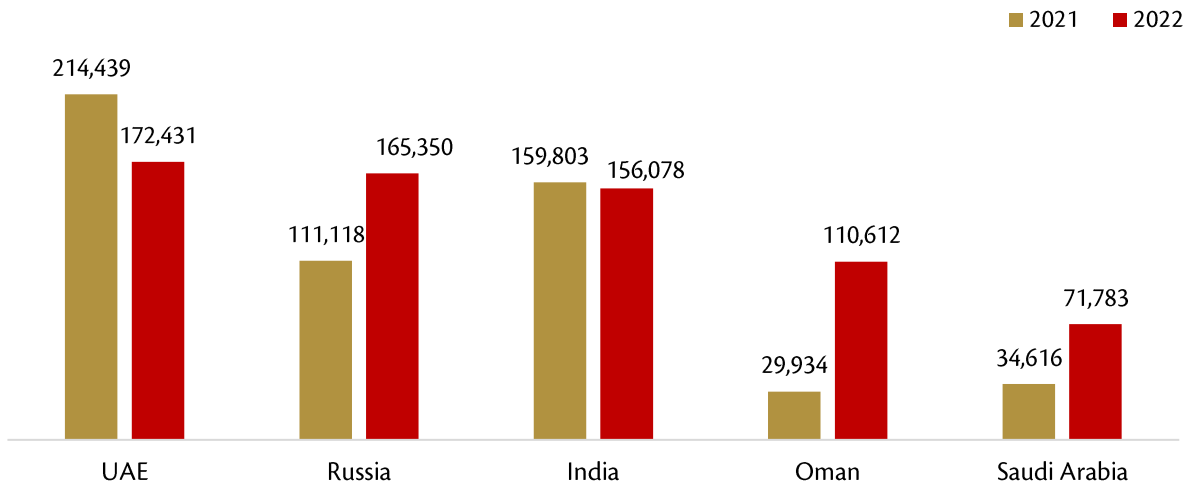**Table 7:** Average number of Operating Hotels and available rooms by star rating

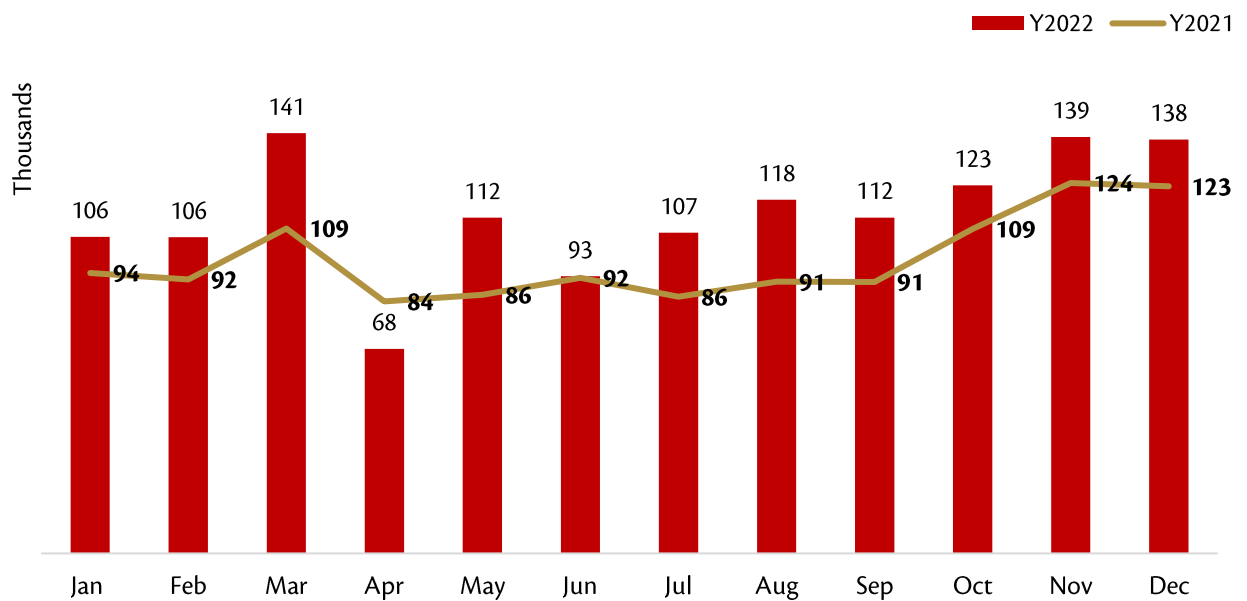| STAR RATING	5 STAR	4 STAR	1 - 3 STAR	APTS
	12	21	34	40
	965	2,567	2,397	2,082

NOTE	Sharjah has over 10,600 rooms

HOSPITALITY
SECTOR PERFORMANCE

Figure 10: top 5 source markets in Sharjah by nationality during Quarters 1 to 4 (2021 – 2022)

Legend: ■ 2021 ■ 2022

Nationality	2021	2022
UAE	214,439	172,431
Russia	111,118	165,350
India	159,803	156,078
Oman	29,934	110,612
Saudi Arabia	34,616	71,783

Figure 11: Hotel guests' trend during Yr. (2021 – 2022)

Legend: ■ Y2022 — Y2021

Thousands

Month	Y2022	Y2021
Jan	106	94
Feb	106	92
Mar	141	109
Apr	68	84
May	112	86
Jun	93	92
Jul	107	86
Aug	118	91
Sep	112	91
Oct	123	109
Nov	139	124
Dec	138	123

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.

$$RevPAR = Occupancy\ x\ ADR$$

Prepared by:
Niama Al Ali – Research & Statistics Division

Reviewed by:
Murtada Al Zaylaie – Excellence Advisor & Strategy Department Acting Manager

For further information, contact us at: statistics@sharjahtourism.ae.