

SHARJAH HOSPITALITY STATISTICS REPORT

Year - 2022

Strategy – Research & Statistics Division
March, 2023





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EXECUTIVE SUMMARY



The annual statistics report of the tourism sector in the Emirate of Sharjah includes the most important actual indicators for the main activities in the tourism sector, such as the number of hotels and hotel apartment, number of rooms, number of guests, the occupancy and revenue ratios in the emirate during the year of 2022.

This report aims to provide the most recent economic and tourism data and information related to developments in the tourism sector in the Emirate of Sharjah to help decision-making centers in the emirate to develop programs and draw sound policies, in addition to assisting administrative leaders in private sector institutions to take wise investment decisions and, henceforth, support the path of economic growth and development in the emirate.

Sharjah Commerce and Tourism Development Authority





EXECUTIVE SUMMARY



Year - 2022

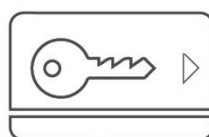
Sharjah Hotel Guests

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

KEY PERFORMANCE INDICATORS	Guest	Occupancy Rate%	ALOS (days)
	1,364,432 ▲ 16%	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 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
	965	2,567	2,397	2,082
NOTE	Sharjah has over 10,700 rooms			





HOSPITALITY SECTOR PERFORMANCE

Figure 1: top 5 source markets in Sharjah by nationality and year.

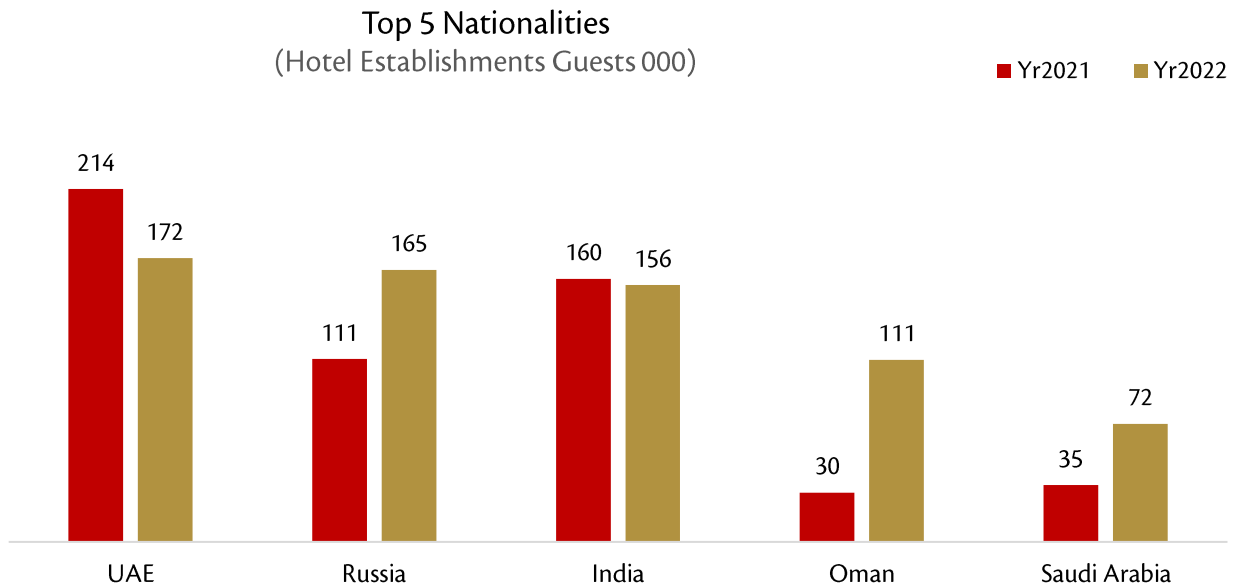
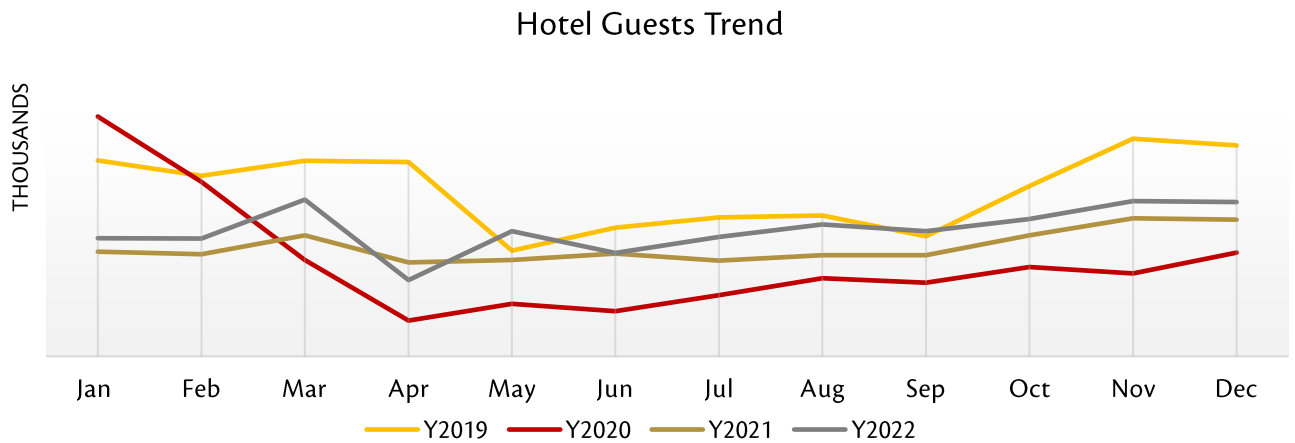


Figure 2: Hotel guests seasonality trend in Sharjah during 2021-2022



Tourism sector in Sharjah had a powerful start in 2022 with about 20% growth rate in number of guests during Q1, 4% in Q2, 26% in Q3 and 13% in Q4. Additionally, the sector witnessed the return of Russian Market which previously witnessed a decline during the pandemic with over 49% growth rate over the year (figure 1). Furthermore, visitors from the GCC also increased more than 161%.





HOSPITALITY SECTOR PERFORMANCE

Overall, the tourism sector in Sharjah witnessed a positive increase in the number of hotel establishments guests by over 16% for the consecutive year (figure 3). Even though the total number did not reach pre pandemic levels, the increase reflects promising recovery over the next couple years.

Figure 3: Guests by Hotel type for period (2018 – 2022)

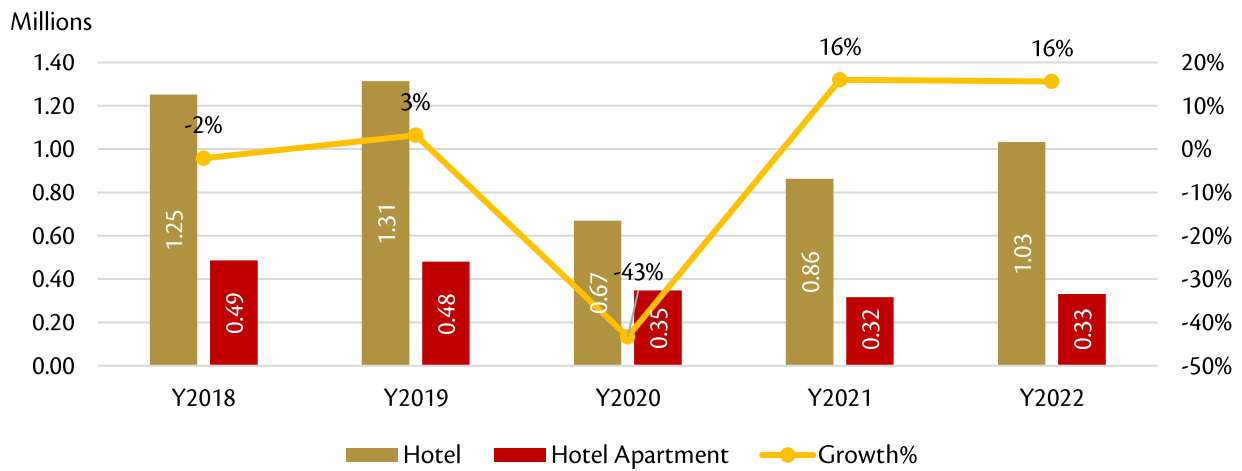
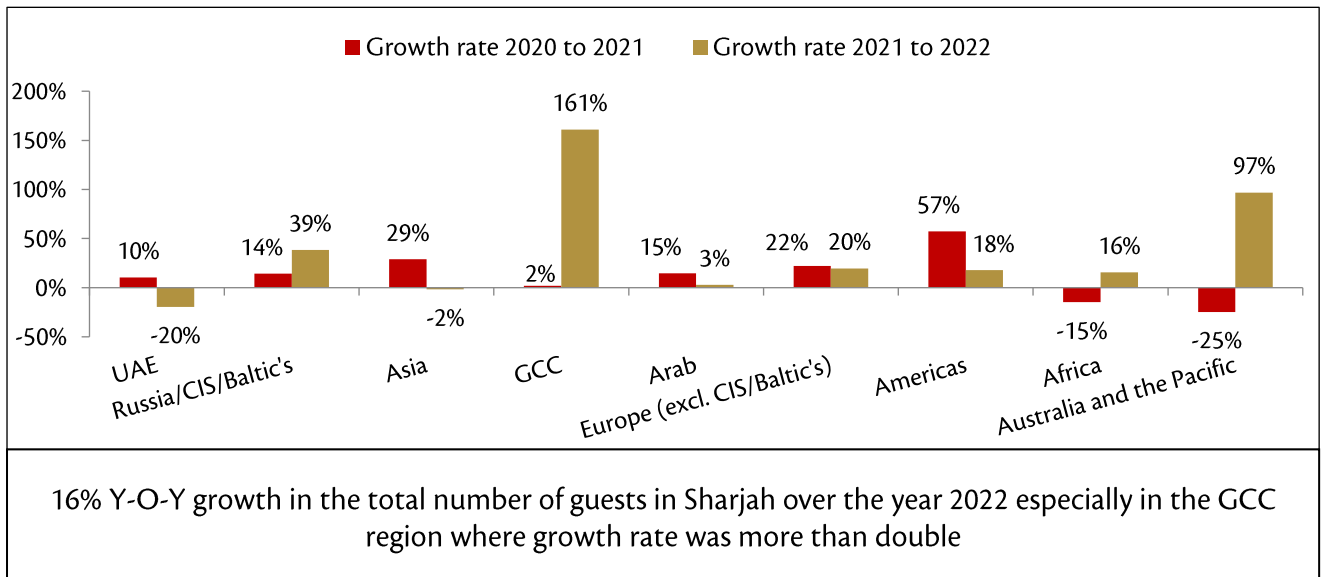


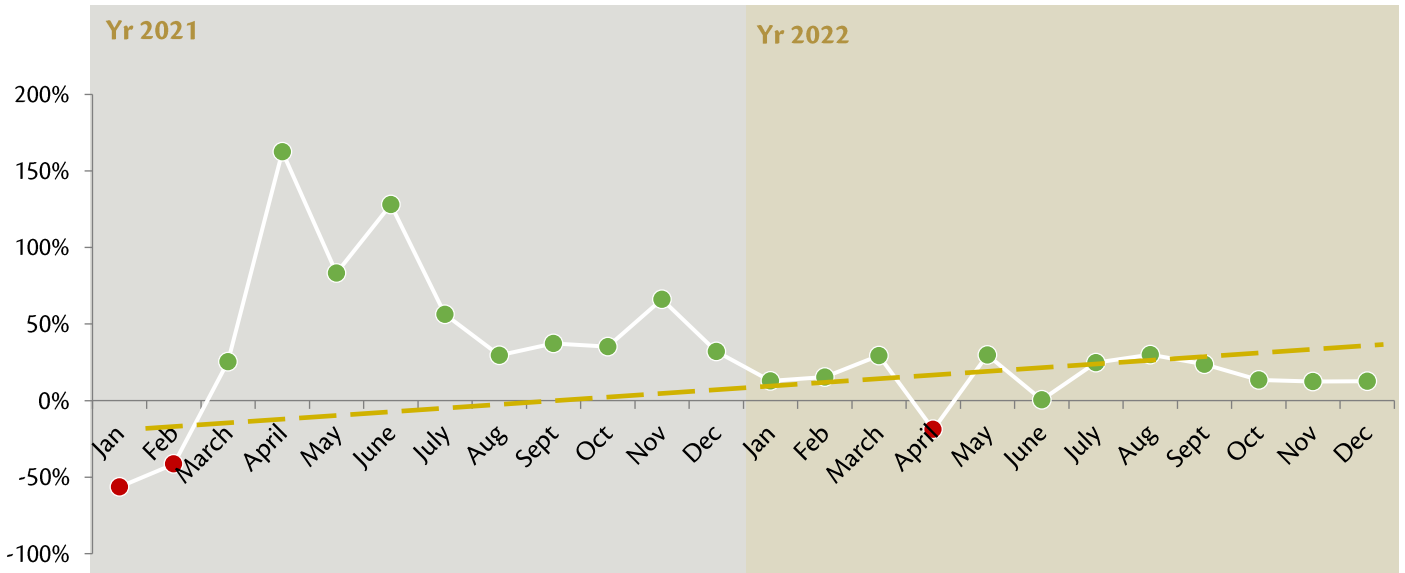
Figure 4: Guests growth rates by year and region





HOSPITALITY SECTOR PERFORMANCE

Figure 5: Guest Growth Rates Monthly Trend in 2020 and 2021



The Sharjah tourism Sector's recovery post Covid-19 can be seen clearly in the positive growth rates Compared to the previous year (2021) as shown in figure 5. The inbound flows of tourists started stabilizing during this year with hopes to reaching pre-pandemic levels. On the other hand, the Sharjah hospitality sector has also reflected positive growths in terms of hotel establishments revenues, which increased by 28% (figure 7). Overall, the spending on tourism activities came from tourists' confidence in the safety and quality of tourism products provided in Sharjah. In spite of the challenging operating environment, the hotel industry has soldiered forward, riding out the storm and looking ahead to a calmer, if not clearer, 2023 and beyond and the future outlook is positive, and our sector is once again showing its resilience and ability to bounce back.



SECTOR PERFORMANCE REVENUE & REVPAR

Figure 6: Revenue Per Available Room by Hotel Type (2018 – 2022)

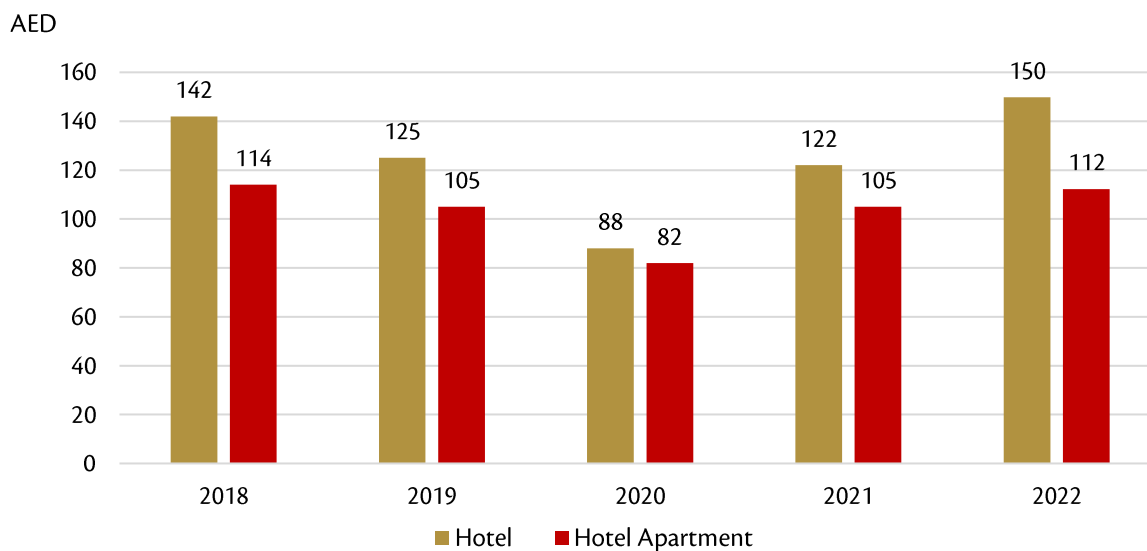
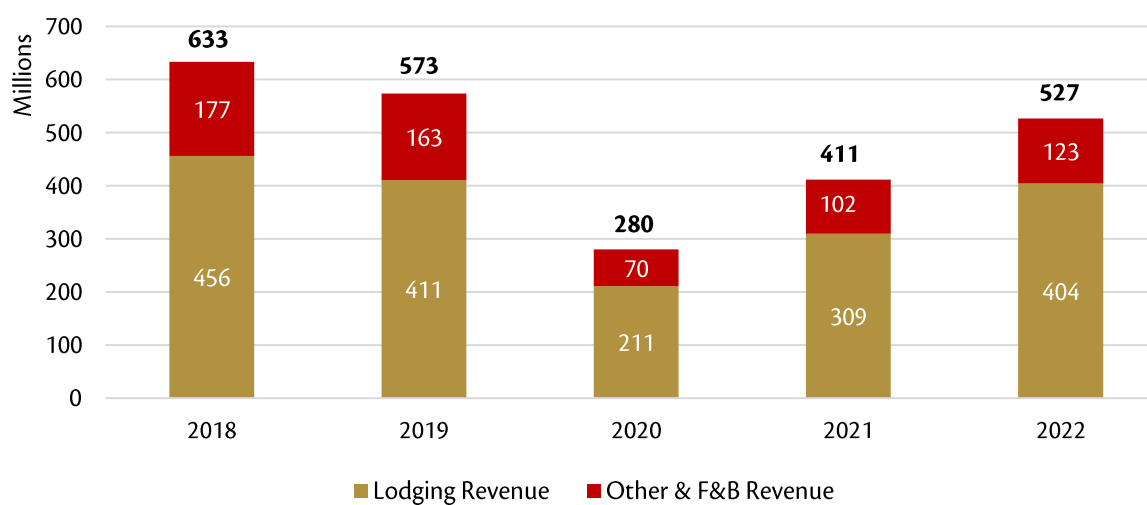


Figure 7: Hotel Establishment Revenue by Type of revenue (2018 – 2022)



KEY INDICATORS ANALYSIS PER HOTEL TYPE: *HOTELS*

Figure 8: Hotels occupancy rate & RevPAR by Hotel classification

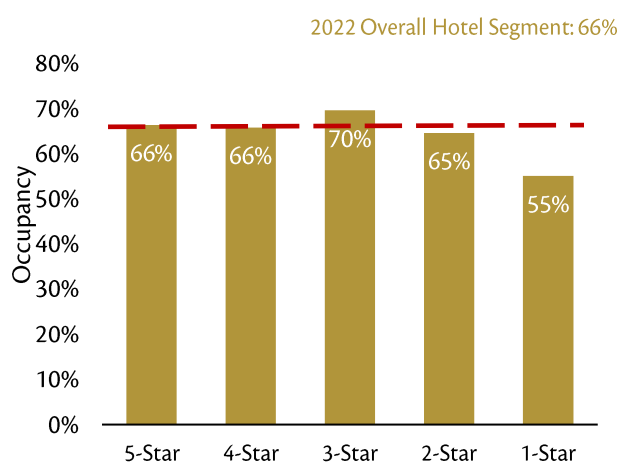
Sharjah Hotels: Occupancy Rates

66%

Sharjah Yr. 2022
Average Hotel
Occupancy Rate

Three Star hotels registered an average occupancy rate of 70% during Yr2022, registering the highest among the other classifications Whereas **Five & Four Star** hotels followed with 66% occupancy rate each.

A. Hotel Occupancy Rates (Yr 2022)



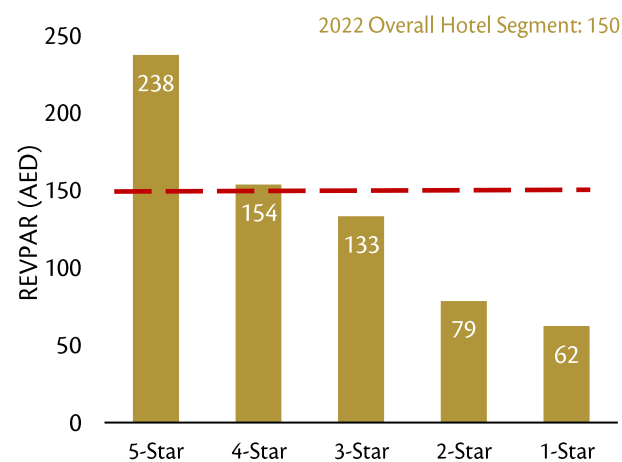
Sharjah Hotels: RevPAR

150_{AED}

Sharjah Yr 2021
Average Hotel
RevPAR

In respect to RevPAR, **Five Star** hotels registered the highest RevPAR (AED 238) in Yr2022 showing an increase of 22% from last year. Whereas, the **Four Star** and **Three Star** hotels registered an increased in RevPAR of 30% and 15% respectively

B. Hotel RevPAR (Yr 2022)



KEY INDICATORS ANALYSIS PER HOTEL TYPE: *HOTEL APARTMENTS*

Figure 9: Hote Apartment occupancy rate & REVPAR by classification

Sharjah Hotel Apartment: Occupancy Rates

64%

Sharjah Yr. 2022
Average Hotel
Apt. Occupancy
Rate

Most of the hotel apartments occupancy rate maintained their levels from last. All classifications have achieved levels of occupancy rate close to segment average.

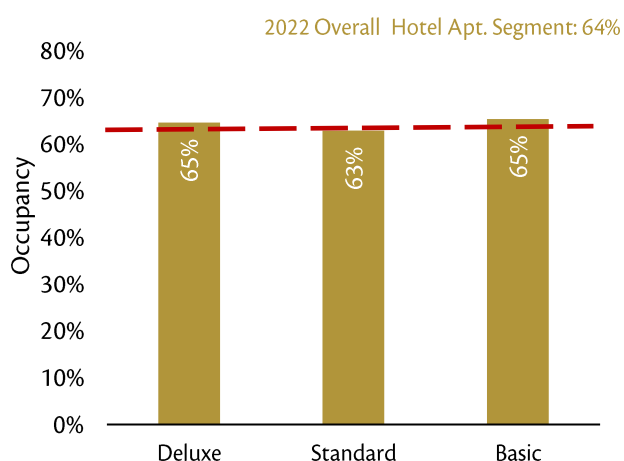
Sharjah Hotel Apartment: RevPAR

112^{AED}

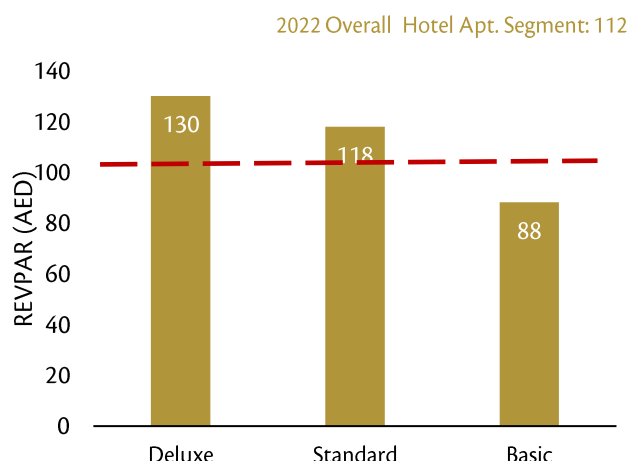
Sharjah Yr 2022
Average Hotel Apt.
RevPAR

Deluxe hotel apartments registered the highest RevPAR of AED 130 during the Yr 2022 followed by **Standard** apartment with AED 118, while, **Basic** apartments remained below sector average with only AED 80 revenue per available flat.

A. Hotel Apartment Occupancy Rates (Yr 2022)



B. Hotel Apartment RevPAR (Yr 2022)



TOP 20 SOURCE MARKETS

Figure 10: Market Share % for the Top 20 Source Markets during Year 2022.

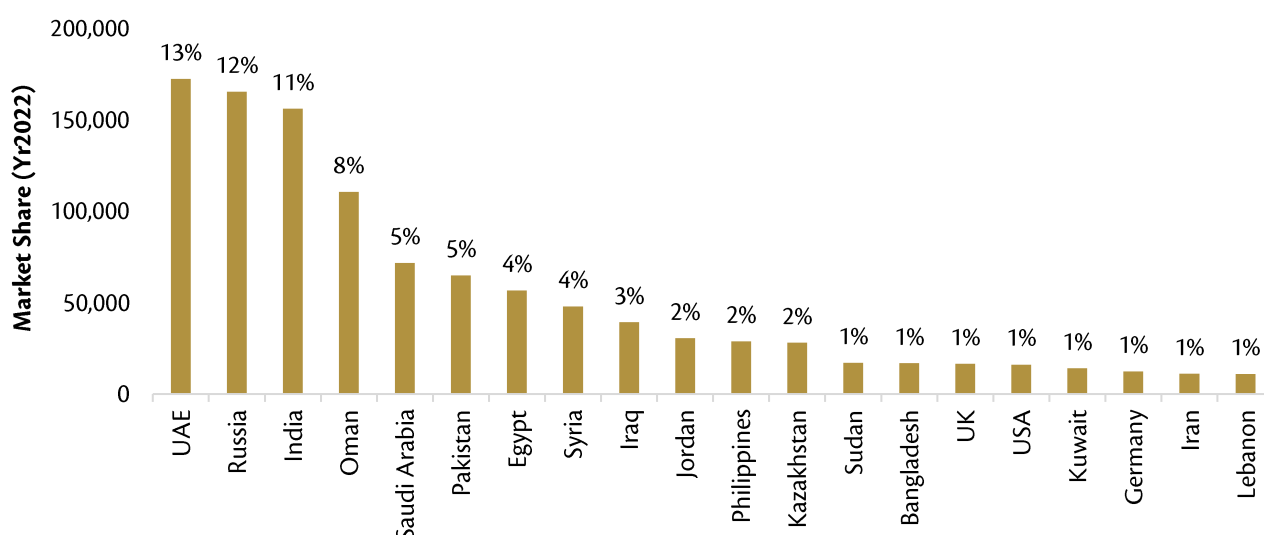
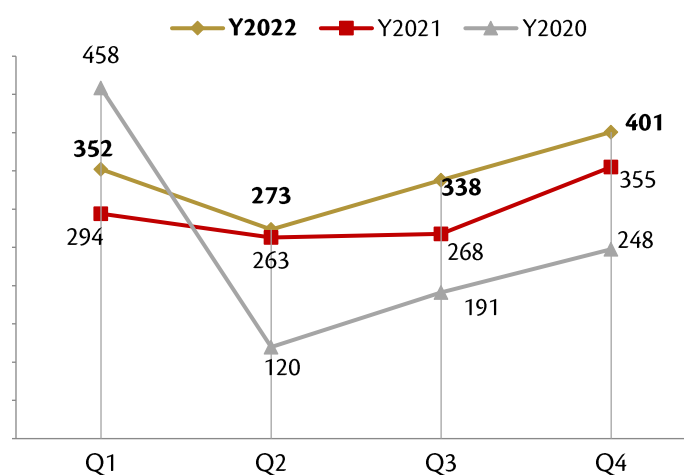


Table 3: Top 20 source markets based on guest arrivals

Rank	Market	ALOS Nights	Nights Number	Change %
1	UAE	1.69	291,291	-20%
2	Russia	2.87	474,825	49%
3	India	2.23	347,659	-2%
4	Oman	1.41	155,500	270%
5	Saudi Arabia	1.81	130,281	107%
6	Pakistan	1.83	118,953	17%
7	Egypt	2.58	146,367	-25%
8	Syria	2.34	111,962	59%
9	Iraq	3.68	144,537	23%
10	Jordan	2.28	69,540	-9%
11	Philippines	2.43	70,237	-28%
12	Kazakhstan	3.18	89,308	46%
13	Sudan	2.53	42,978	2%
14	Bangladesh	1.70	28,927	16%
15	UK	2.11	34,952	20%
16	USA	2.42	38,895	8%
17	Kuwait	2.35	33,328	53%
18	Germany	2.20	27,029	31%
19	Iran	2.64	29,199	29%
20	Lebanon	2.64	29,041	12%

*change% based on guest numbers compared to 2021

Figure 15: Evolution in the number of (000) Hotels Guest



KEY SOURCE MARKETS PERFORMANCE

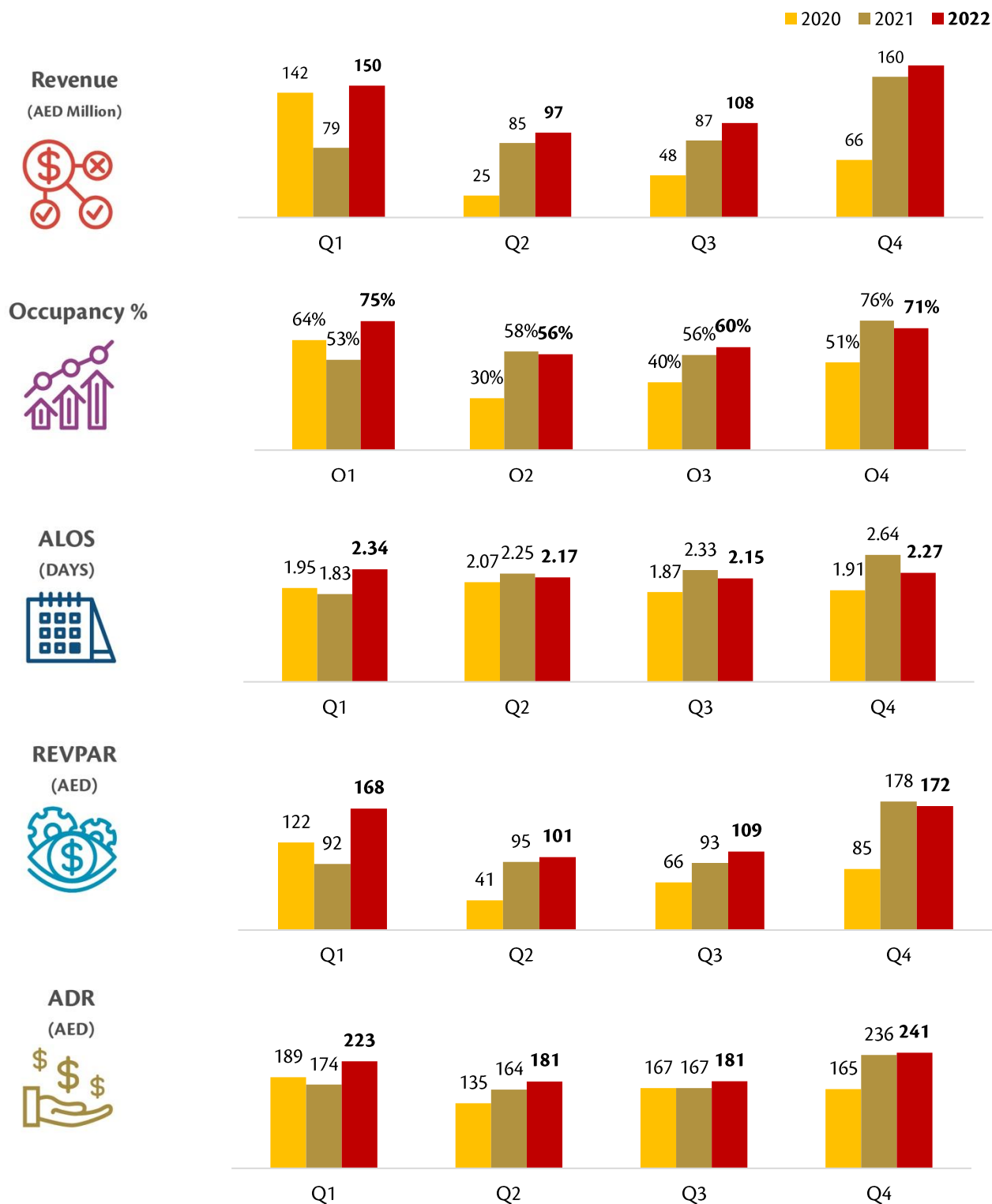
Table 4: Key source markets performance

India	Guest		Growth%		2022 %Share	Guest Night		Growth%	
	Yr2021	Yr2022				Yr2021	Yr2022		
Quarter	Yr2021	Yr2022				Yr2021	Yr2022		
Q1	45,812	40,613	▼	-11%	12%	113,053	99,139	▼	-12%
Q2	29,399	34,986	▲	19%	13%	65,721	81,513	▲	24%
Q3	34,916	38,547	▲	10%	11%	95,640	83,382	▼	-13%
Q4	49,676	41,932	▼	-16%	10%	188,254	83,625	▼	-56%
Total	159,803	156,078	▼	-2%	11%	462,668	347,659	▼	-25%
China	Guest		Growth%		2022 %Share	Guest Night		Growth%	
	Yr2021	Yr2022				Yr2021	Yr2022		
Quarter	Yr2021	Yr2022				Yr2021	Yr2022		
Q1	1,446	1,817	▲	26%	1%	1,407	4,225	▲	200%
Q2	2,261	2,163	▼	-4%	1%	5,558	3,100	▼	-44%
Q3	4,339	961	▼	-78%	0%	5,364	2,314	▼	-57%
Q4	3,446	1,356	▼	-61%	0%	6,195	2,882	▼	-53%
Total	11,492	6,297	▼	-45%	0%	18,524	12,521	▼	-32%
Russia	Guest		Growth%		2022 %Share	Guest Night		Growth%	
	Yr2021	Yr2022				Yr2021	Yr2022		
Quarter	Yr2021	Yr2022				Yr2021	Yr2022		
Q1	16,751	34,807	▲	108%	10%	41,957	98,170	▲	134%
Q2	38,302	21,018	▼	-45%	8%	114,141	53,698	▼	-53%
Q3	13,651	36,242	▲	165%	11%	37,573	109,077	▲	190%
Q4	42,414	73,283	▲	73%	18%	121,456	213,880	▲	76%
Total	111,118	165,350	▲	49%	12%	315,127	474,825	▲	51%
GCC*	Guest		Growth%		2022 %Share	Guest Night		Growth%	
	Yr2021	Yr2022				Yr2021	Yr2022		
Quarter	Yr2021	Yr2022				Yr2021	Yr2022		
Q1	6,726	58,322	▲	767%	17%	10,084	99,852	▲	890%
Q2	11,150	42,410	▲	280%	16%	21,892	67,130	▲	207%
Q3	21,563	55,340	▲	157%	16%	38,106	87,150	▲	129%
Q4	41,733	55,733	▲	34%	14%	69,177	96,784	▲	40%
Total	81,172	211,805	▲	161%	16%	139,259	350,916	▲	152%

*All GCC countries excluding UAE

SECTOR PERFORMANCE – KEY INDICATORS (QUARTERLY)

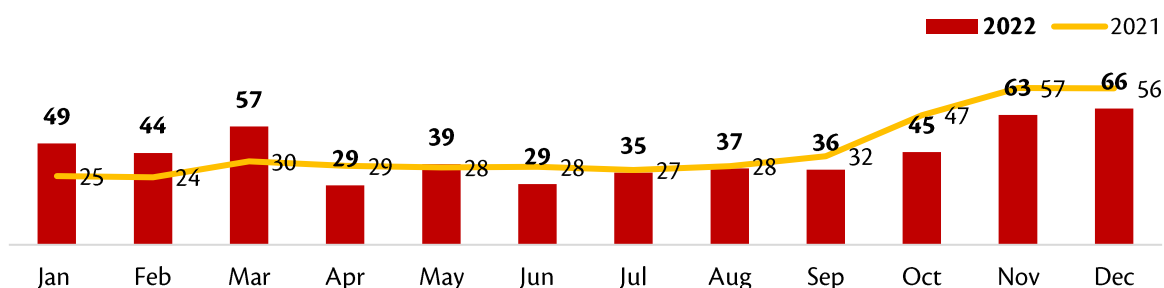
Figure 11: main indicators by quarter during Years 2020 - 2022



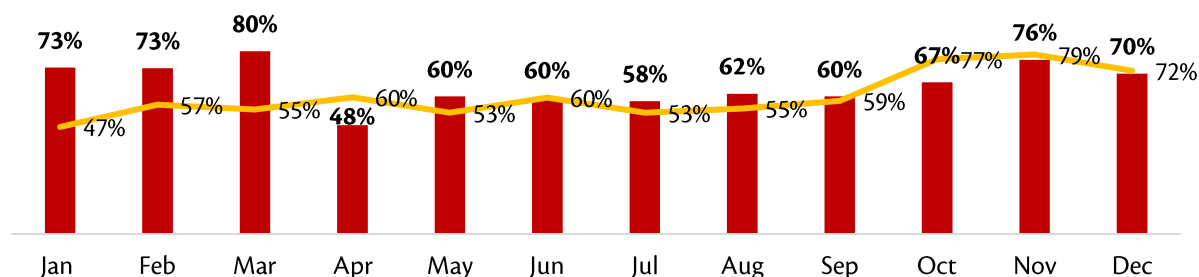
SECTOR PERFORMANCE – KEY INDICATORS (MONTHLY)

Figure 12: monthly main indicators during Years 2021 - 2022

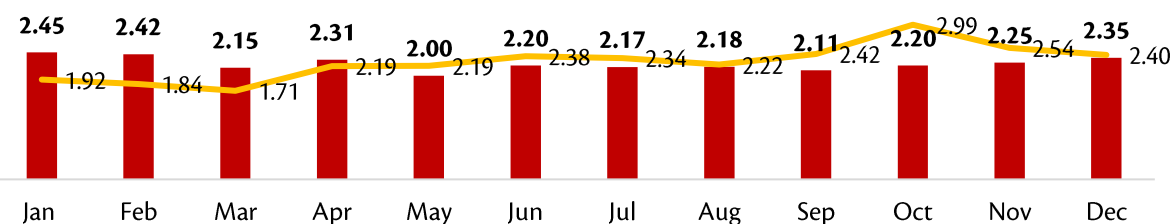
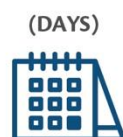
Revenue (AED Million)



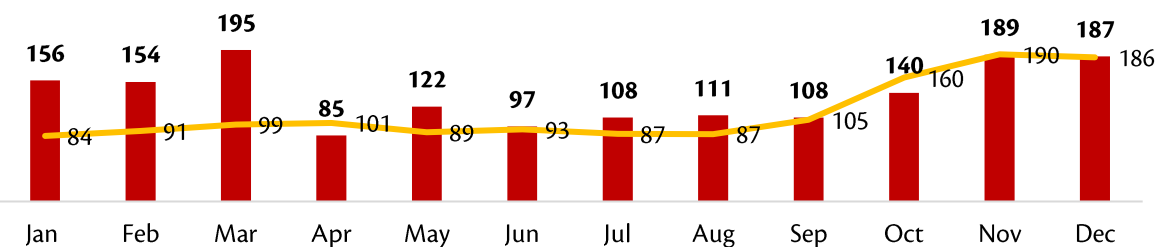
Occupancy %



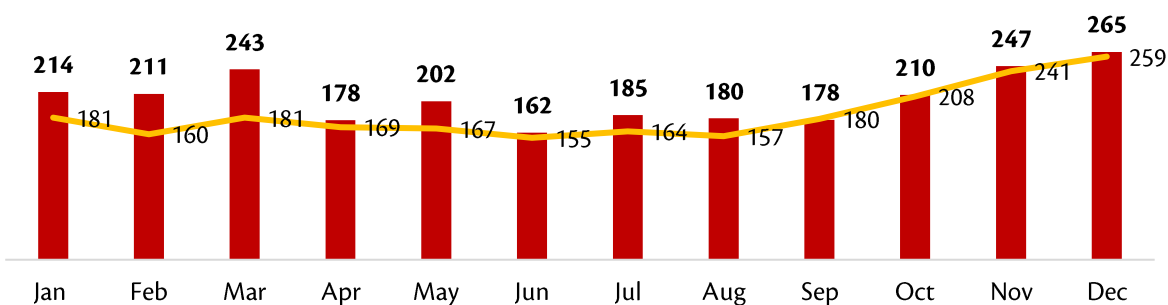
ALOS (DAYS)



REVPAR (AED)



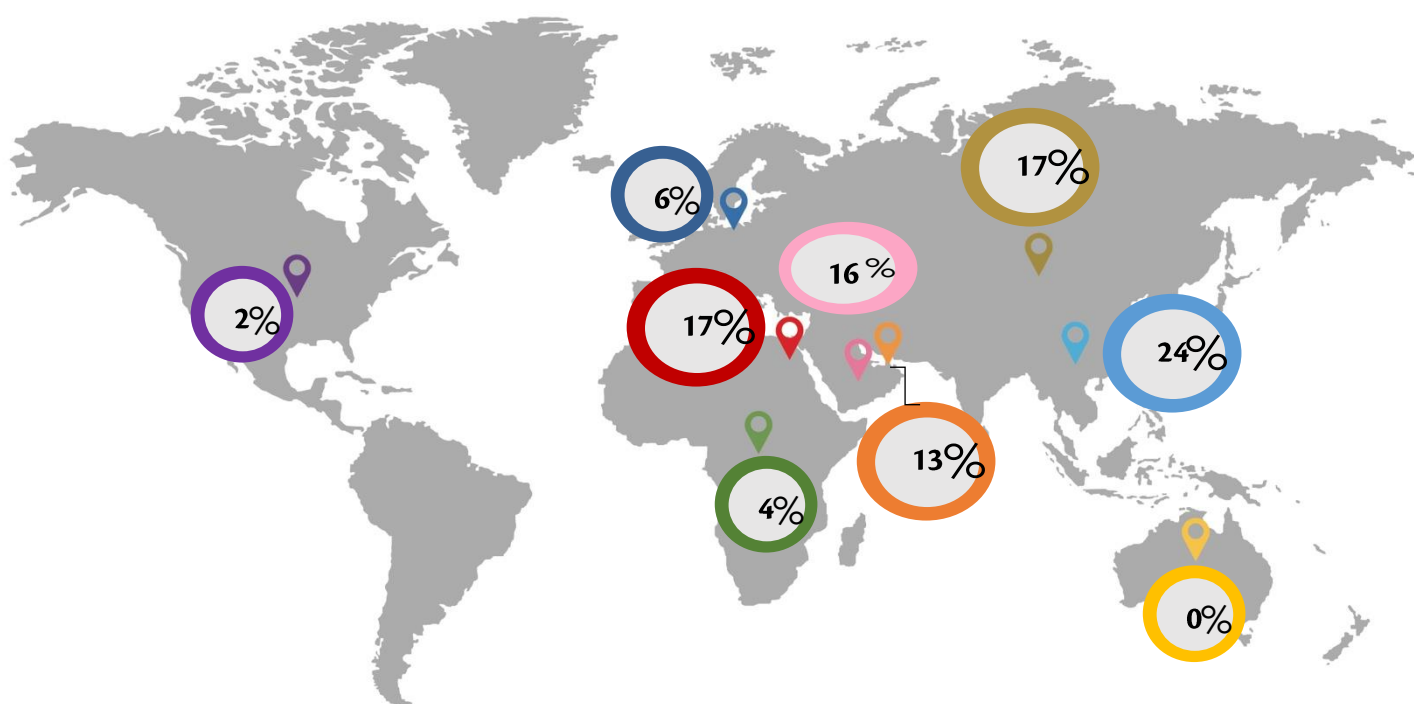
ADR (AED)














KEY INDICATORS BY REGION

SHARE %



GROWTH %

	Russia, CIS & Baltics	39%	▲
	Americas	18%	▲
	GCC	161%	▲
	Arabs	3%	▲
	Europe Ex. Russia, CIS	20%	▲
	Asia	2%	▼
	Africa	16%	▲
	Australia & The Pacific	97%	▲
	UAE	20%	▼





KEY INDICATORS PER HOTEL TYPE



Table 5: Hotels performance by classification during Year 2022

★★★★★ 5-Star	Available Rooms	352,172				
	Occupancy	66%				
Number of Hotels:	ALOS	1.99				
12	RevPAR	238				
	Top 5 Nationalities	1) UAE	2) Russia	3) KSA	4) Oman	5) India
★★★★★ 4-Star	Available Rooms	937,669				
	Occupancy	66%				
Number of Hotels:	ALOS	2.14				
21	RevPAR	154				
	Top 5 Nationalities	1) Russia	2) UAE	3) Oman	4) India	5) KSA
★★★ 3-Star	Available Rooms	540,323				
	Occupancy	70%				
Number of Hotels:	ALOS	2.35				
14	RevPAR	133				
	Top 5 Nationalities	1) India	2) Oman	3) UAE	4) KSA	5) Pakistan
★★ 2-Star	Available Rooms	221,828				
	Occupancy	65%				
Number of Hotels:	ALOS	2.37				
11	RevPAR	79				
	Top 5 Nationalities	1) India	2) Oman	3) Pakistan	4) UAE	5) KSA
★ 1-Star	Available Rooms	112,559				
	Occupancy	55%				
Number of Hotels:	ALOS	2.04				
10	RevPAR	62				
	Top 5 Nationalities	1) India	2) Pakistan	3) Bangladesh	4) Oman	5) Philippines
Deluxe	Available Rooms	293,981				
	Occupancy	65%				
Number of Hotels:	ALOS	2.44				
7	RevPAR	130				
	Top 5 Nationalities	1) UAE	2) India	3) Oman	4) Iraq	5) KSA
Standard	Available Rooms	199,317				
	Occupancy	63%				
Number of Hotels:	ALOS	2.07				
8	RevPAR	118				
	Top 5 Nationalities	1) India	2) Iraq	3) Egypt	4) Oman	5) KSA
Basic	Available Rooms	266,358				
	Occupancy	65%				
Number of Hotels:	ALOS	2.66				
26	RevPAR	88				
	Top 5 Nationalities	1) India	2) Pakistan	3) Oman	4) Egypt	5) Syria





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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