

SHARJAH HOSPITALITY STATISTICS REPORT

Q1 – 2023

Strategy – Research & Statistics Division
May, 2023





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EXECUTIVE SUMMARY



1st Quarter - 2023

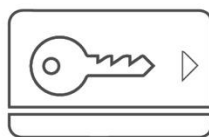
Sharjah Hotel Main Indicators

Table 1: Sharjah Tourism Main Indicators – Q1 2023 vs. Q1 2022

KEY PERFORMANCE INDICATORS	Guest	Occupancy Rate%	ALOS (days)
	467,775 ▲ 33%	73% ▼ 2%	1.99 ▼ 14%
	Total Revenue	RevPAR	ADR
	AED 190 Million ▲ 26%	AED 177 ▲ 5%	AED 252 ▲ 13%



110 HOTEL

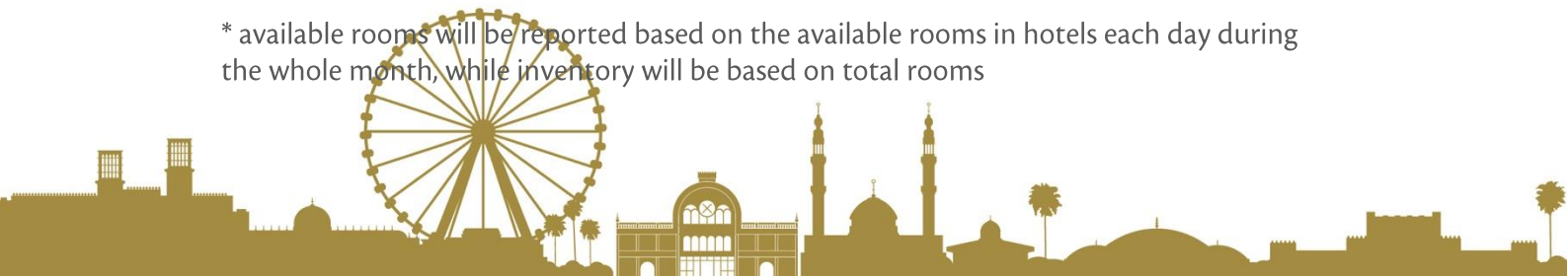


800,028 *ROOMS Available

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

STAR RATING	5 STAR	4 STAR	1 - 3 STAR	APTS
	13	21	35	39
	91,030	287,696	235,274	186,028
NOTE	Sharjah has over 10,600 rooms			

* available rooms will be reported based on the available rooms in hotels each day during the whole month, while inventory will be based on total rooms





HOSPITALITY SECTOR PERFORMANCE

Figure 1: top 5 source markets in Sharjah by nationality during Q1 (2022 – 2023)

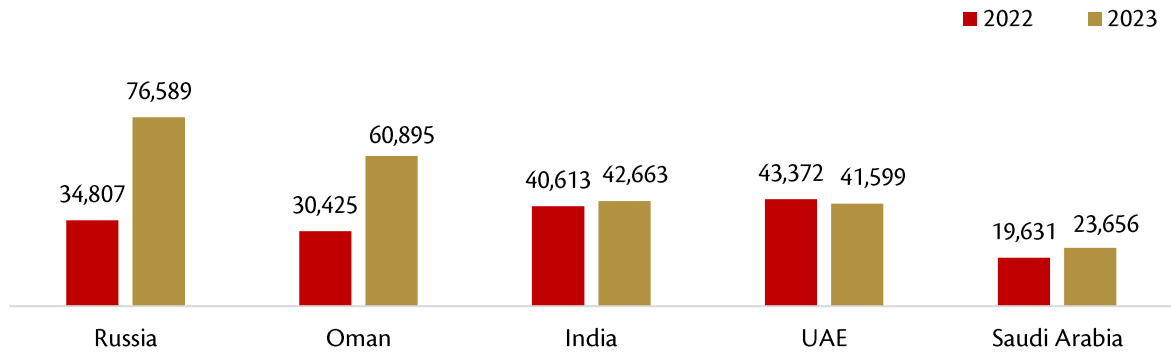


Figure 2: Hotel guests in Sharjah during first quarter 2022-2023

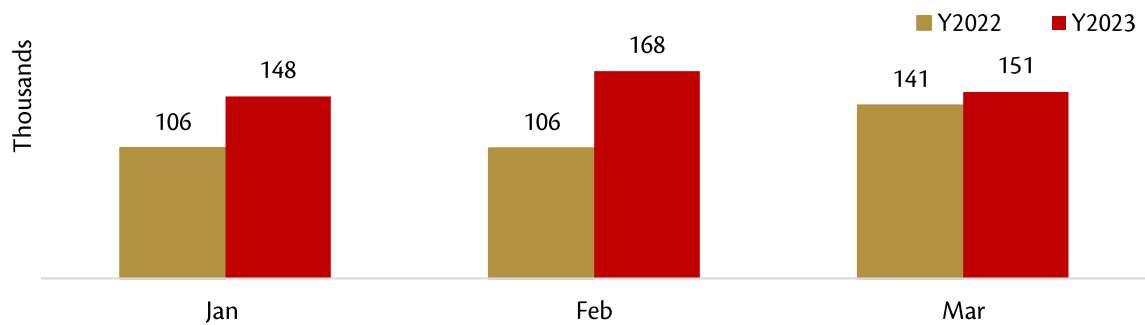
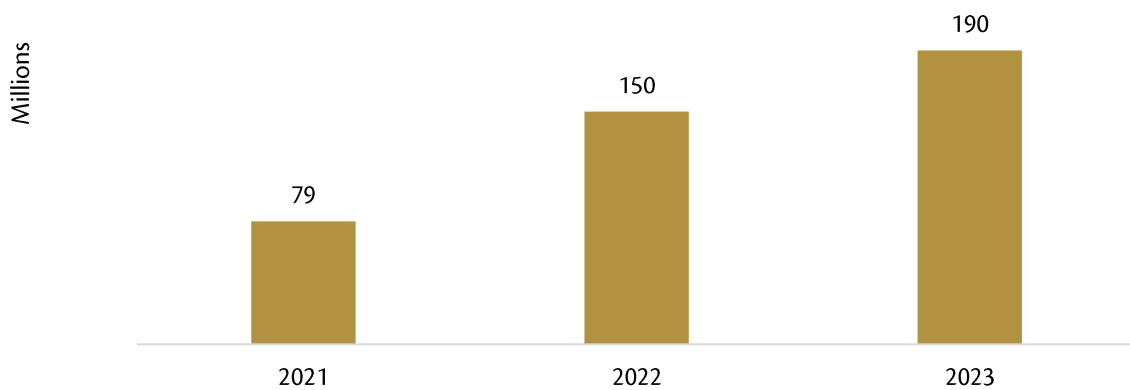


Figure 3: Hotel Establishments total revenue – Q1

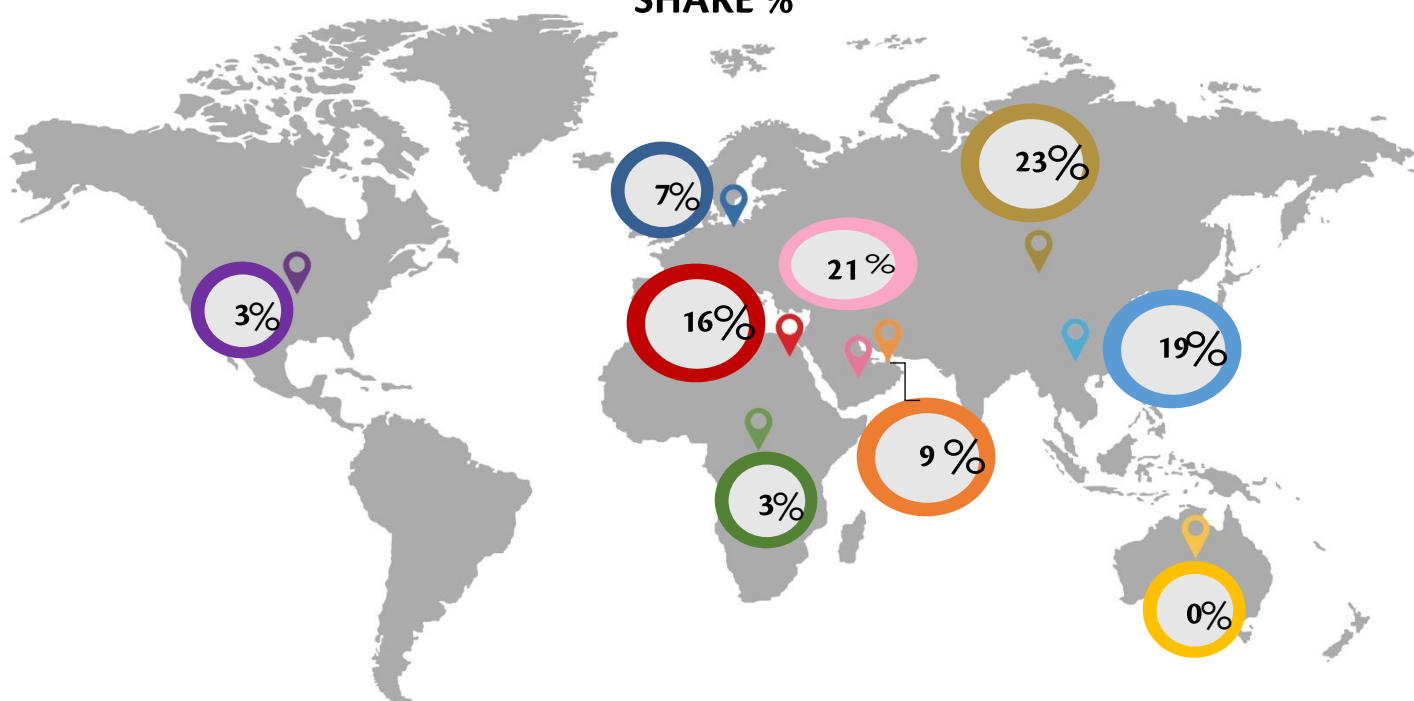




KEY INDICATORS BY REGION

Figure 4: Guest arrivals geographical distribution by market share and growth %

SHARE %



GROWTH %

	Russia, CIS & Baltics	92%	▲
	Americas	44%	▲
	GCC	67%	▲
	Arabs	21%	▲
	Europe Ex. Russia, CIS	19%	▲
	Asia	4%	▲
	Africa	7%	▲
	Australia & The Pacific	75%	▲
	UAE	4%	▼



TOP 20 SOURCE MARKETS

Figure 5: Market Share % for the Top 20 Source Markets during Q1 - 2023.

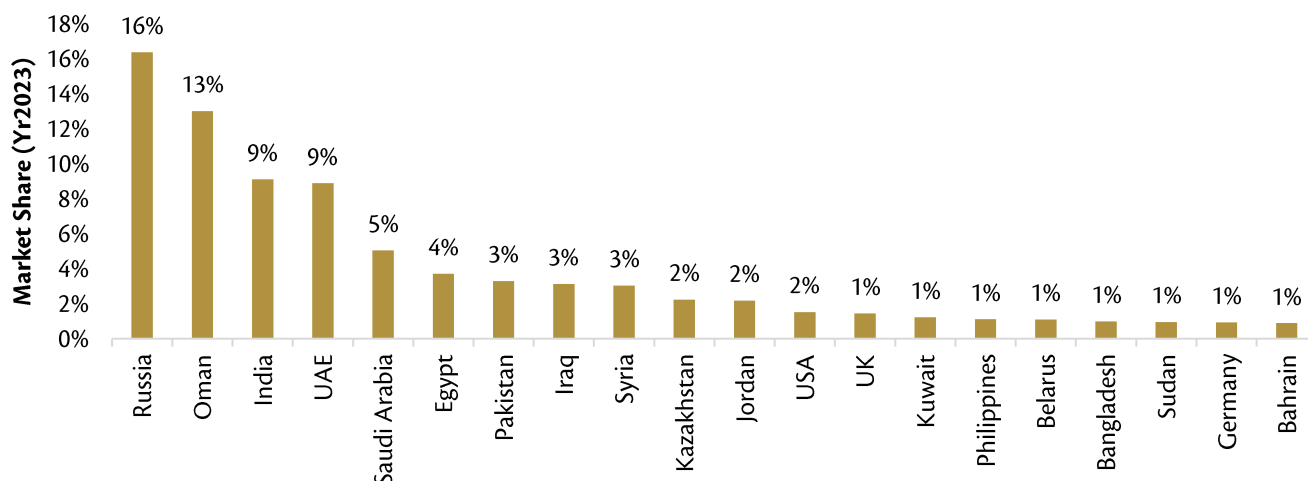
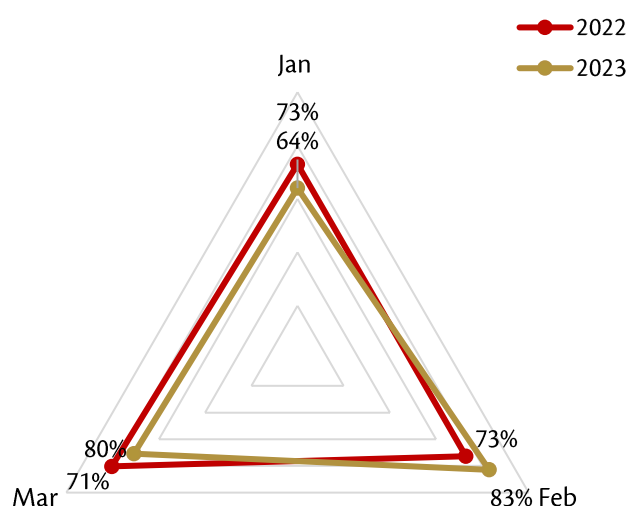


Table 3: Top 20 source markets

Rank	Market	ALOS Nights	Nights Number	Change %
1	Russia	2.62	200,973	120%
2	Oman	1.23	74,769	100%
3	India	1.98	84,312	5%
4	UAE	1.57	65,111	-4%
5	KSA	1.68	39,644	21%
6	Egypt	2.37	41,083	27%
7	Pakistan	1.72	26,578	0%
8	Iraq	2.89	42,338	30%
9	Syria	2.01	28,633	18%
10	Kazakhstan	2.44	25,501	55%
11	Jordan	1.82	18,531	30%
12	USA	2.03	14,493	42%
13	UK	2.02	13,613	39%
14	Kuwait	2.09	12,051	42%
15	Philippines	1.88	9,847	-22%
16	Belarus	2.55	13,026	176%
17	Bangladesh	1.47	6,739	17%
18	Sudan	2.01	9,020	4%
19	Germany	2.01	8,684	12%
20	Bahrain	1.46	6,051	57%

*note: rank & change% based on guest numbers compared to 2022

Figure 6: Average Occupancy Rate - Q1

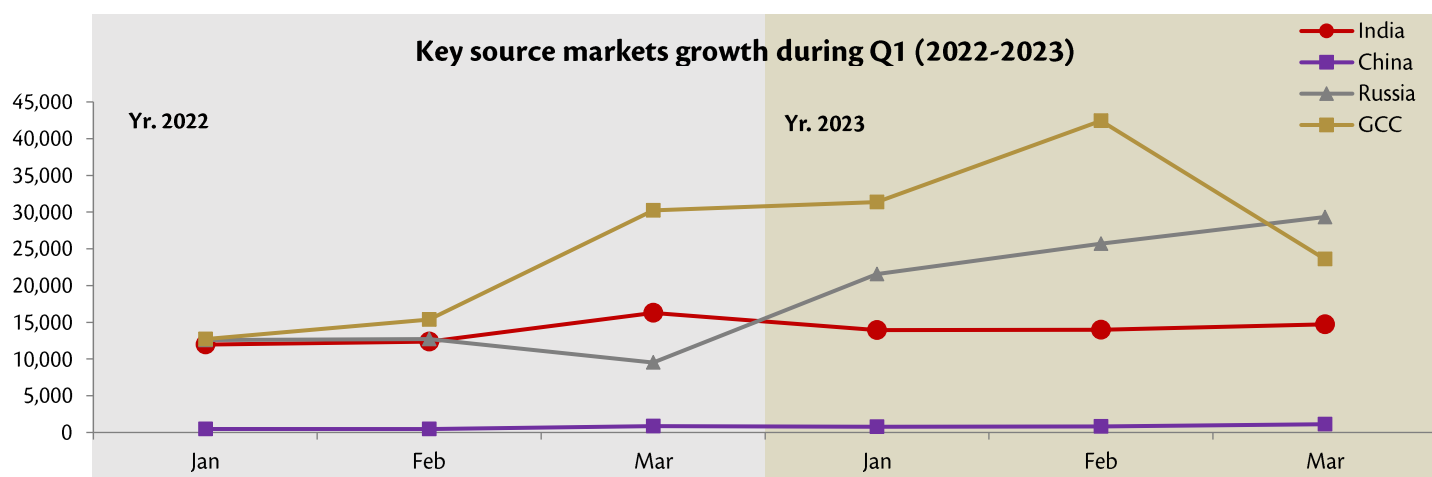


KEY SOURCE MARKETS PERFORMANCE

Table 4: Key source markets performance

India	Guest		Growth%		2023 %Share	Guest Night		Growth%	
Month	Yr2022	Yr2023				Yr2022	Yr2023		
Jan	11,963	13,950	▲	17%	9%	31,757	25,241	▼	-21%
Feb	12,373	13,999	▲	13%	8%	28,814	26,471	▼	-8%
Mar	16,277	14,714	▼	-10%	10%	38,568	32,600	▼	-15%
Q1	40,613	42,663	▲	5%	9%	99,139	84,312	▼	-15%
China	Guest		Growth%		2023 %Share	Guest Night		Growth%	
Month	Yr2022	Yr2023				Yr2022	Yr2023		
Jan	476	783	▲	64%	1%	873	2,226	▲	155%
Feb	464	813	▲	75%	0%	983	1,748	▲	78%
Mar	877	1,121	▲	28%	1%	2,369	2,086	▼	-12%
Q1	1,817	2,717	▲	50%	1%	4,225	6,060	▲	43%
Russia	Guest		Growth%		2023 %Share	Guest Night		Growth%	
Month	Yr2022	Yr2023				Yr2022	Yr2023		
Jan	12,585	21,567	▲	71%	15%	39,135	54,415	▲	39%
Feb	12,706	25,687	▲	102%	15%	35,844	69,210	▲	93%
Mar	9,516	29,335	▲	208%	19%	23,191	77,348	▲	234%
Q1	34,807	76,589	▲	120%	16%	98,170	200,973	▲	105%
GCC	Guest		Growth%		2023 %Share	Guest Night		Growth%	
Month	Yr2022	Yr2023				Yr2022	Yr2023		
Jan	12,710	31,375	▲	147%	21%	22,895	45,407	▲	98%
Feb	15,371	42,430	▲	176%	25%	27,633	54,720	▲	98%
Mar	30,241	23,601	▼	-22%	16%	49,324	37,650	▼	-24%
Q1	58,322	97,406	▲	67%	21%	99,852	137,777	▲	38%

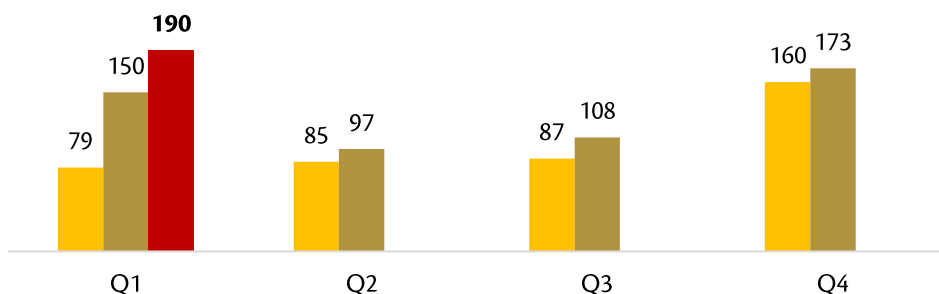
*All GCC countries excluding UAE



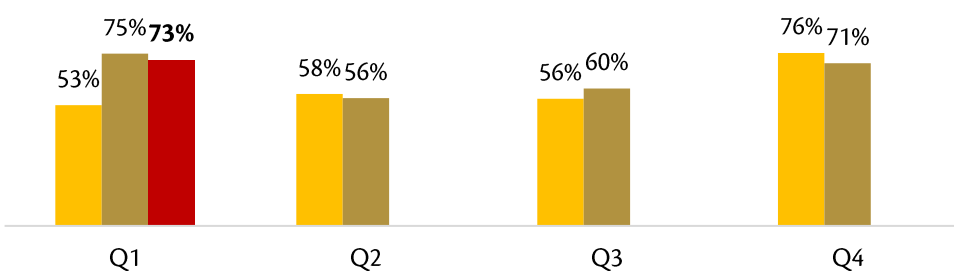
SECTOR PERFORMANCE – KEY INDICATORS (QUARTERLY)

■ 2021 ■ 2022 ■ 2023

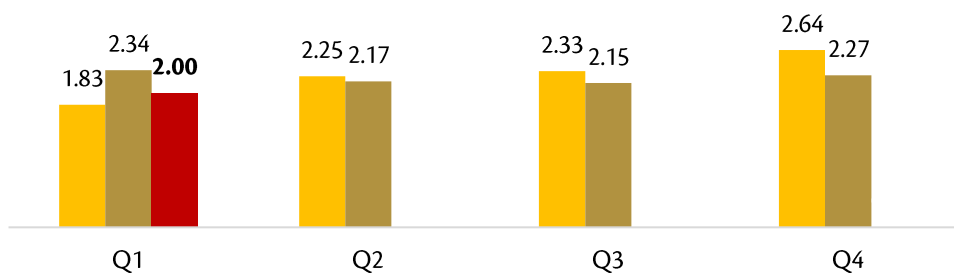
Revenue
(AED Million)



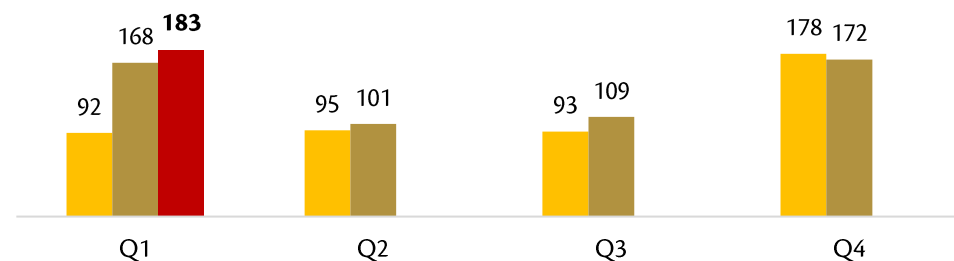
Occupancy %



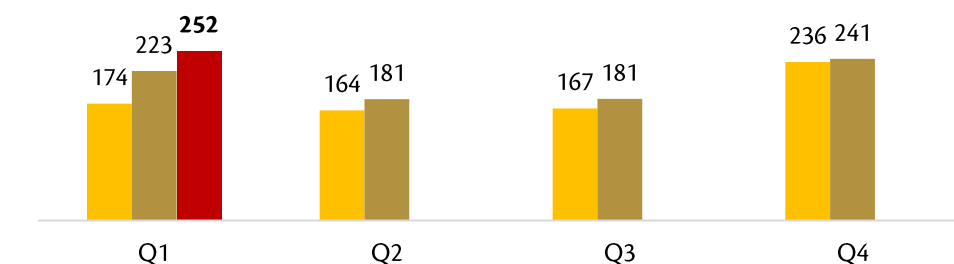
ALOS
(DAYS)



REVPAR
(AED)

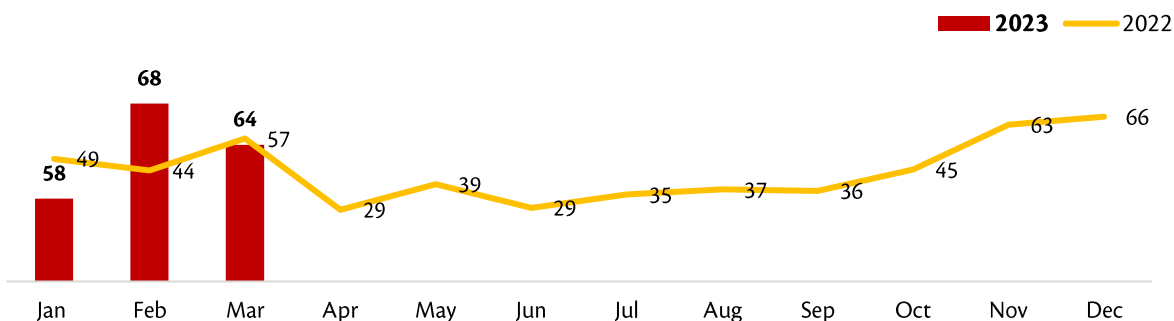


ADR
(AED)

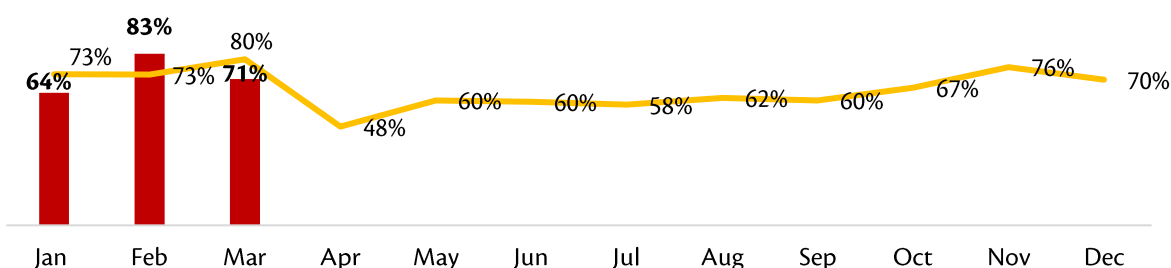


SECTOR PERFORMANCE – KEY INDICATORS (MONTHLY)

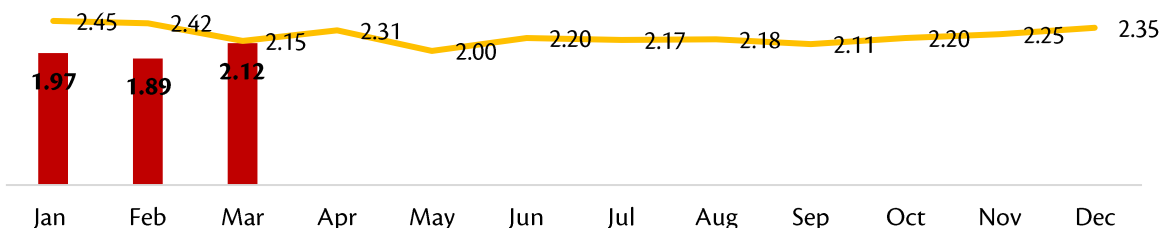
Revenue (AED Million)



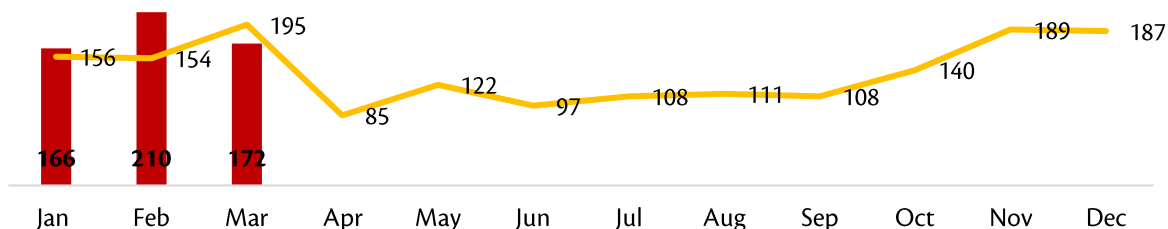
Occupancy %



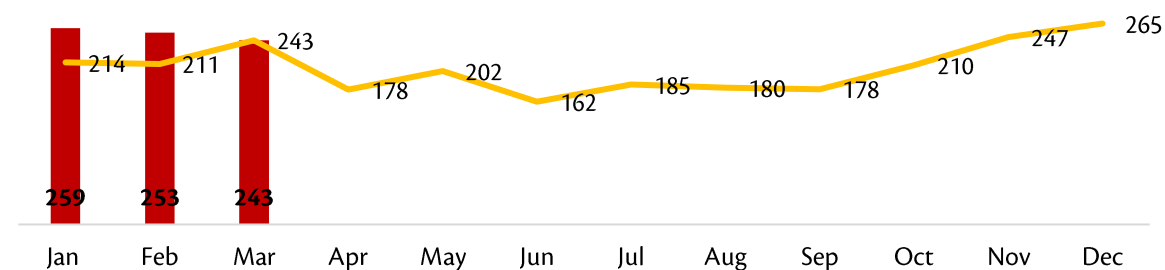
ALOS (DAYS)



REVPAR (AED)



ADR (AED)





KEY INDICATORS PER HOTEL TYPE



Table 5: Hotels performance by classification

★★★★★ 5-Star	Available Rooms	91,030					
	Occupancy	75%					
Number of Hotels:	ALOS	1.98					
13	RevPAR	300					
	Top 5 Nationalities	1) Russia	2) UAE	3) Oman	4) KSA	5) UK	
★★★★★ 4-Star	Available Rooms	287,696					
	Occupancy	71%					
Number of Hotels:	ALOS	1.82					
21	RevPAR	188					
	Top 5 Nationalities	1) Russia	2) Oman	3) UAE	4) India	5) KSA	
★★★ 3-Star	Available Rooms	152,521					
	Occupancy	75%					
Number of Hotels:	ALOS	2.22					
14	RevPAR	155					
	Top 5 Nationalities	1) Oman	2) India	3) Russia	4) UAE	5) KSA	
★★ 2-Star	Available Rooms	55,278					
	Occupancy	68%					
Number of Hotels:	ALOS	2.10					
11	RevPAR	99					
	Top 5 Nationalities	1) Oman	2) India	3) Pakistan	4) UAE	5) Russia	
★ 1-Star	Available Rooms	27,475					
	Occupancy	54%					
Number of Hotels:	ALOS	1.99					
10	RevPAR	80					
	Top 5 Nationalities	1) India	2) Pakistan	3) Oman	4) Bangladesh	5) Russia	
Deluxe	Available Rooms	72,990					
	Occupancy	76%					
Number of Hotels:	ALOS	2.55					
7	RevPAR	186					
	Top 5 Nationalities	1) UAE	2) Oman	3) India	4) KSA	5) Iraq	
Standard	Available Rooms	46,890					
	Occupancy	73%					
Number of Hotels:	ALOS	1.63					
8	RevPAR	159					
	Top 5 Nationalities	1) Oman	2) India	3) Egypt	4) Iraq	5) KSA	
Basic	Available Rooms	66,148					
	Occupancy	76%					
Number of Hotels:	ALOS	2.14					
26	RevPAR	107					
	Top 5 Nationalities	1) Oman	2) India	3) Egypt	4) Russia	5) Pakistan	





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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