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Hospitality Forum
2018 Sharjah الشارقة

عام زايد
YEAR OF ZAYED

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Government of Sharjah
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Sharjah Commerce & Tourism Development Authority
الشارقة Sharjah

SHARJAH TOURISM & HOSPITALITY SECTOR PERFORMANCE 2017 / 2018 H1

14th November 2018

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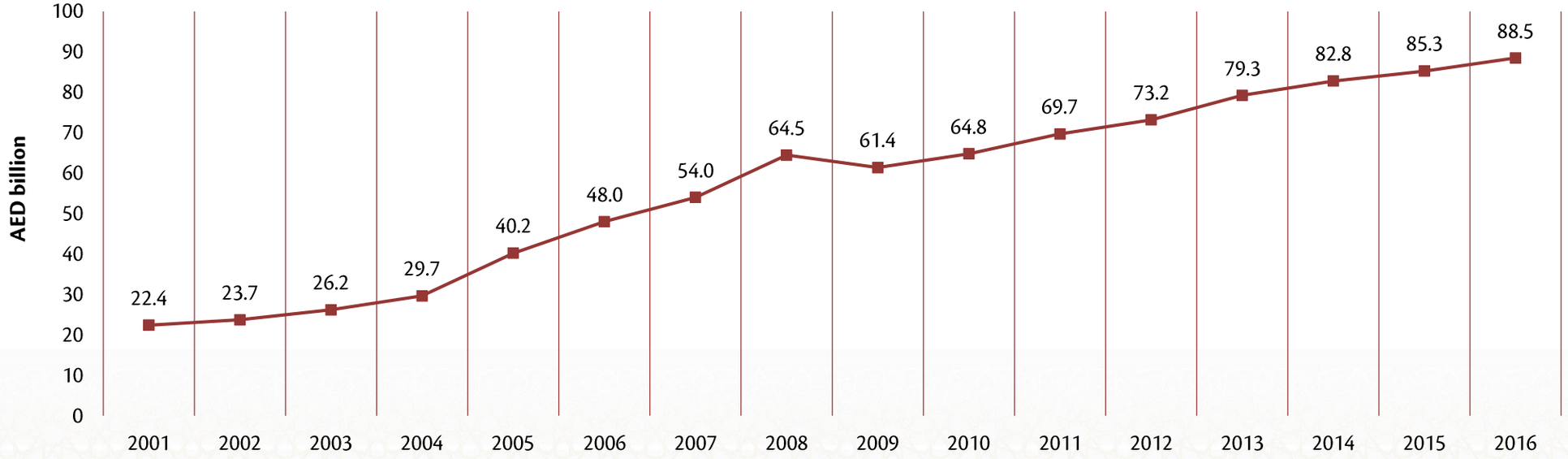
SHARJAH ECONOMIC & TOURISM TRENDS

SHARJAH GDP (AED BILLION)



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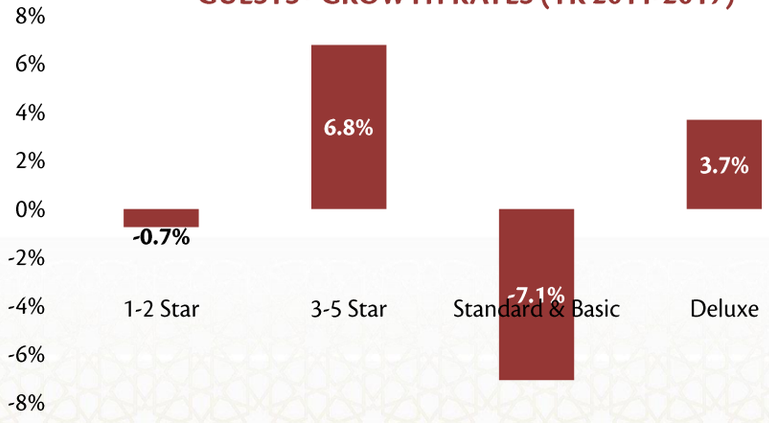
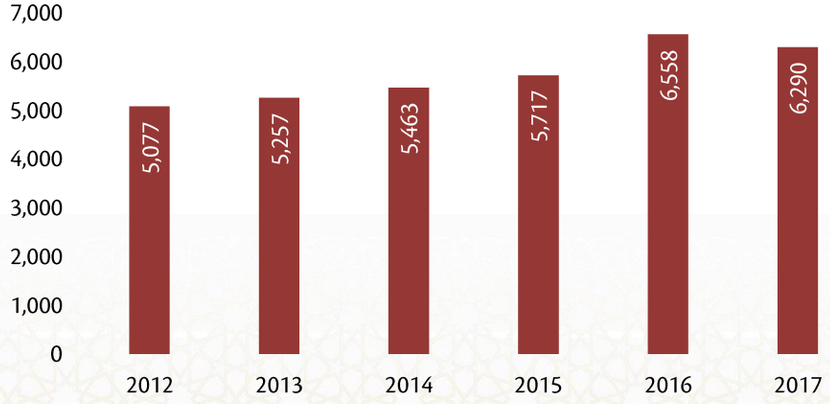
SHARJAH ECONOMIC & TOURISM TRENDS

GUESTS - GROWTH RATES (YR 2011-2017)



HOTEL ROOMS (YR2012-2017)



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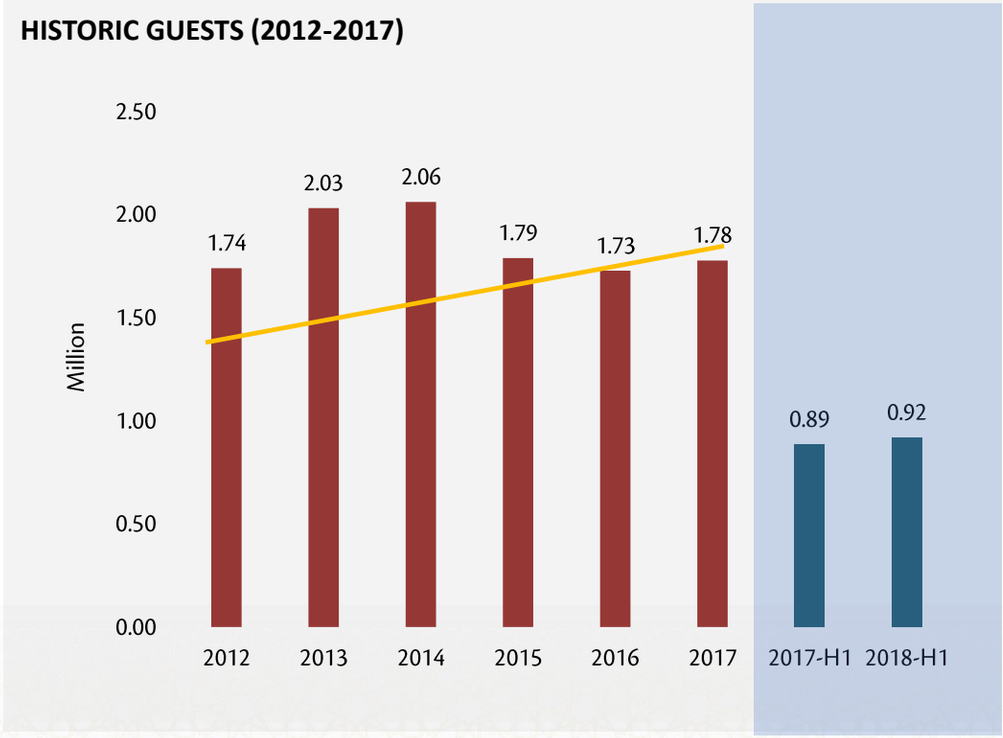
GUESTS

1.78 MILLION

In 2017, a total of 1.78 million people stayed at hospitality establishments in the Emirate of Sharjah



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GUESTS

GUEST VISIT CAGR (2012-2017)

3%	- 5%	0.3%
HOTELS	HOTEL APARTMENTS	HOTEL ESTABLISHMENTS

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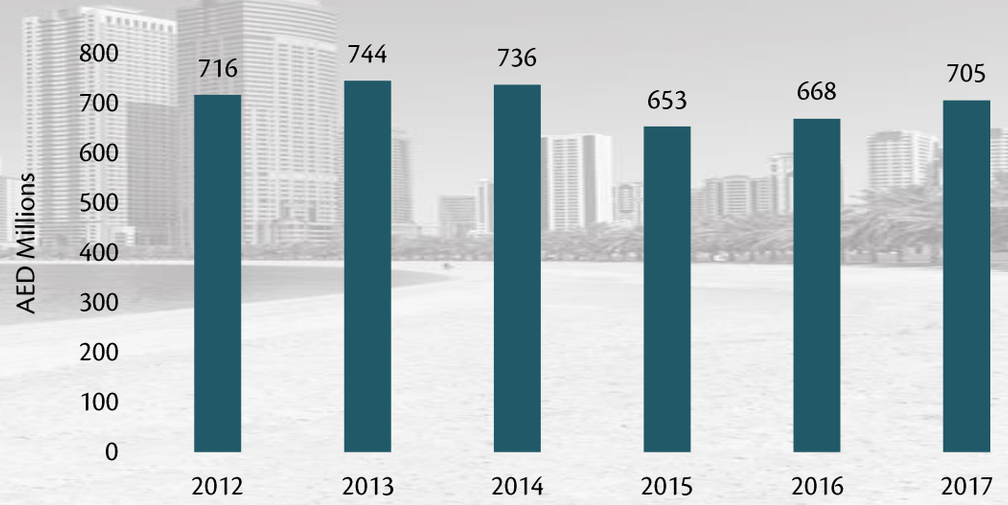
REVENUE

705
MILLION (AED)

POSITIVE GROWTH in REVENUE

HISTORIC REVENUE: 2012-2017



As a result of increasing number of visitors to Sharjah and rising RevPar, the hospitality segment revenue illustrated a growth rate of **3.8% per annum** (Yr 2011 – 2017)

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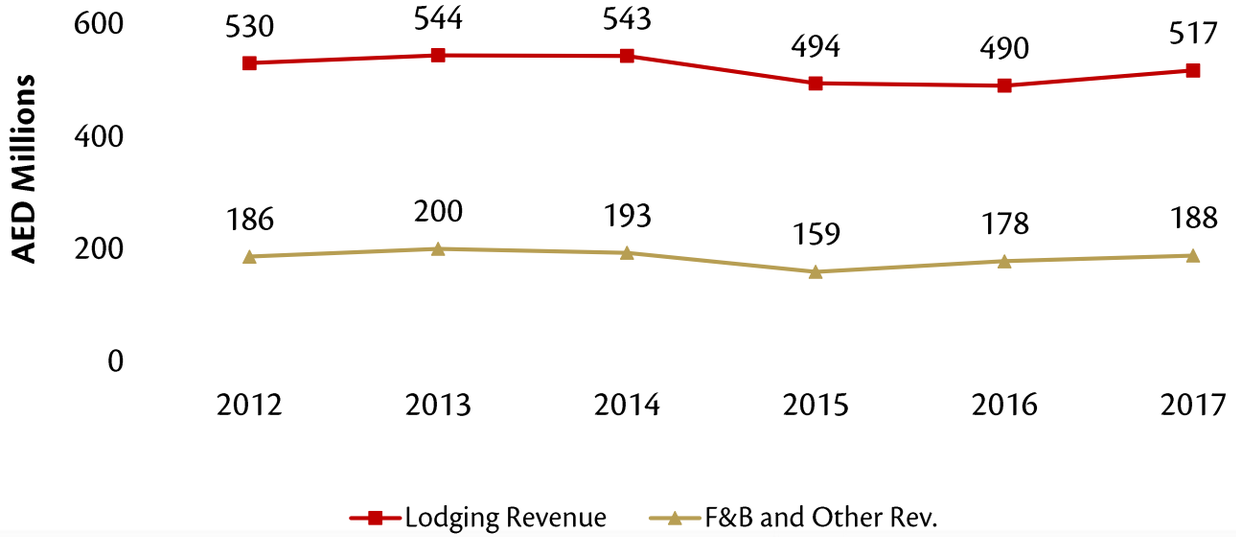
REVENUE



Lodging generated approximately three-fourths of the overall hospitality revenue in Sharjah

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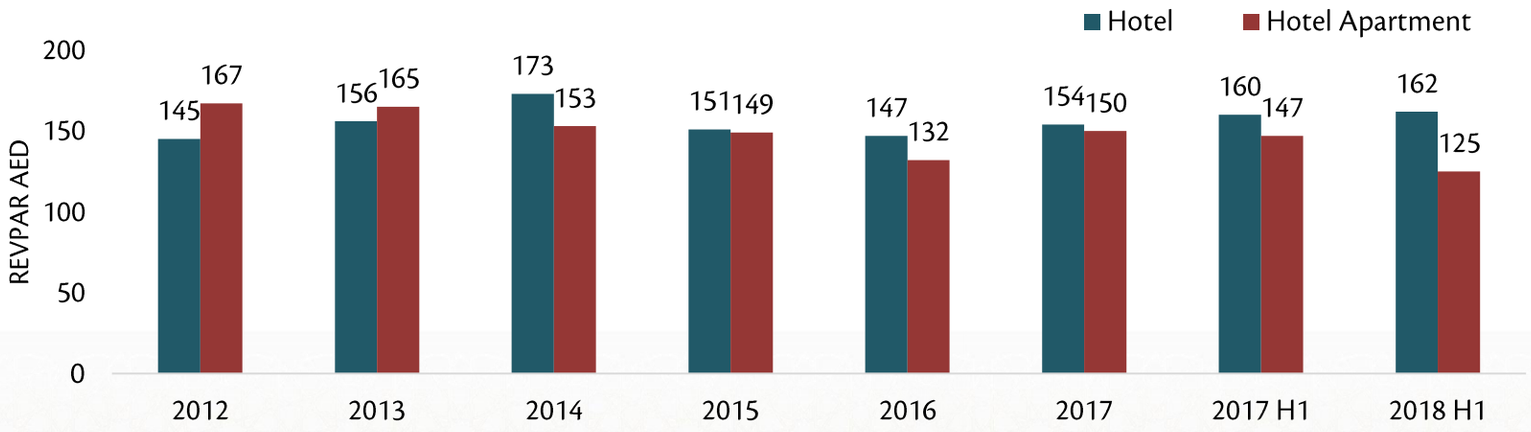
REVPAR

HOTEL APARTMENTS (2018 H1)

AED 125

HOTELS (2018 H1)

AED 162



After 2014, the highest REVPAR for hotel segment was registered during first half of this year (2018)

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OCCUPANCY

YR 2011

58%

YR 2017

70%

There is an overall increase in occupancy rates at hospitality establishments based in the Emirate of Sharjah

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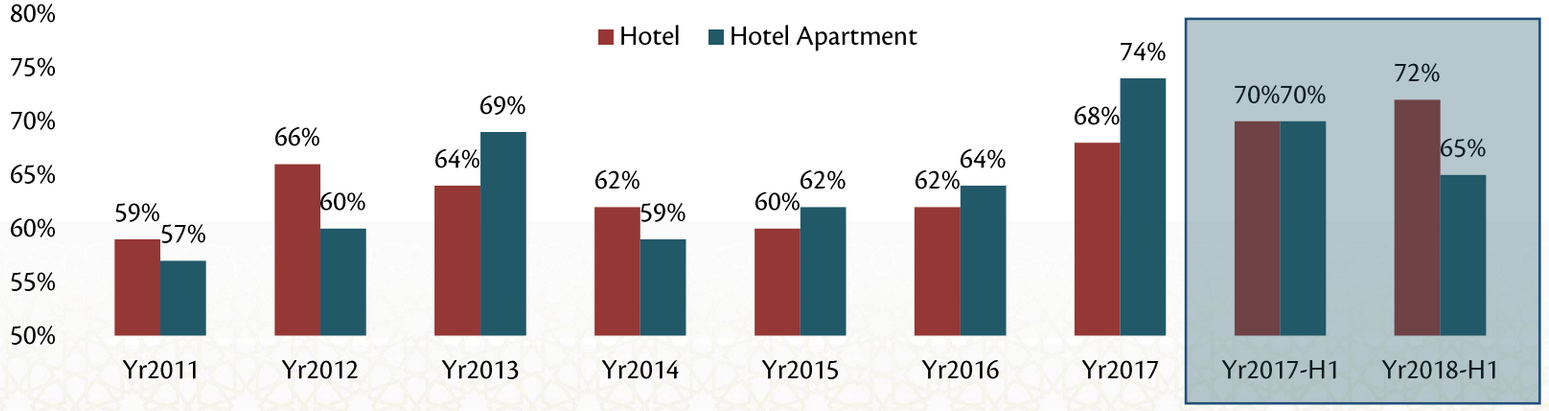
OCCUPANCY



YR 2018-H1

SUSTAINED THE OCCUPANCY LEVELS

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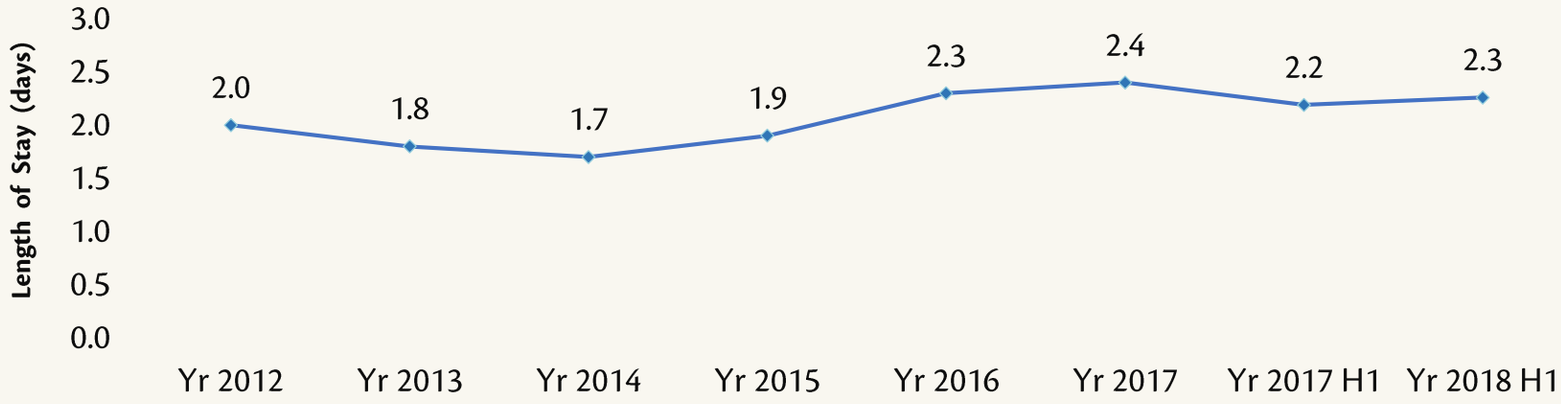
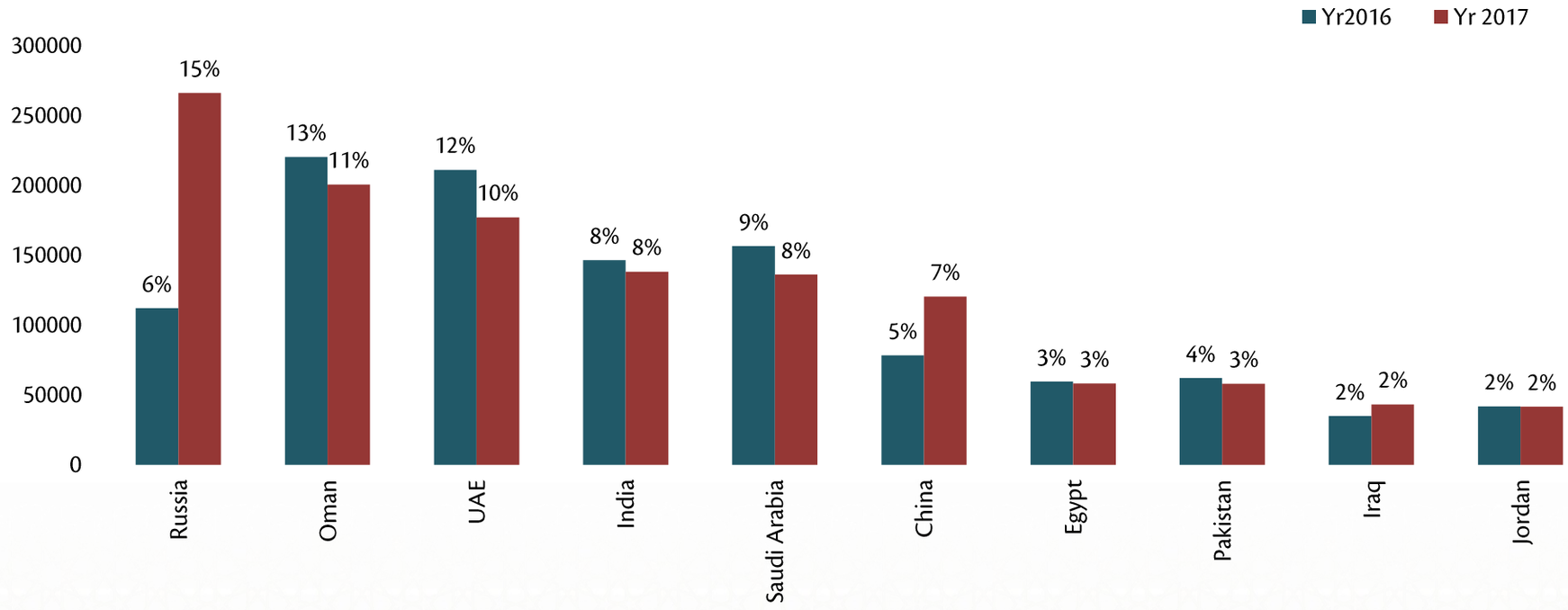
LENGTH OF STAY



TOP 10 MARKETS IN 2017

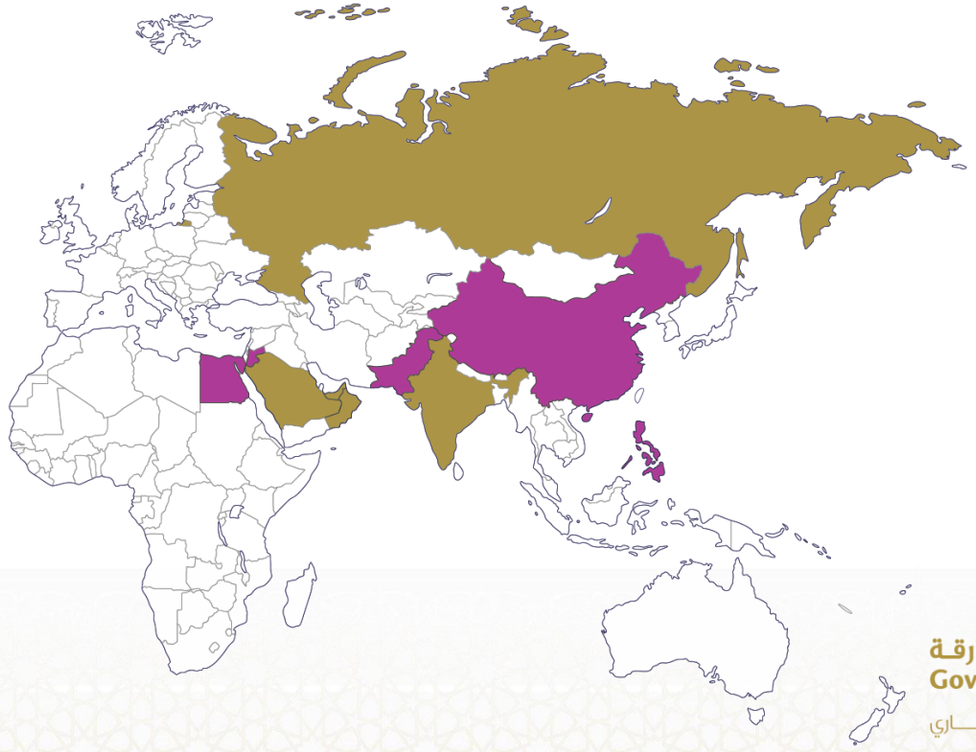


The Year 2017 witnessed the strong return of Russian Visitors to UAE and Sharjah. They comprised the majority of the visitors to Sharjah in Yr 2017 with 15% market Share. However, visitors from China still registered the highest growth - CAGR 51% (Yr 2013-17)

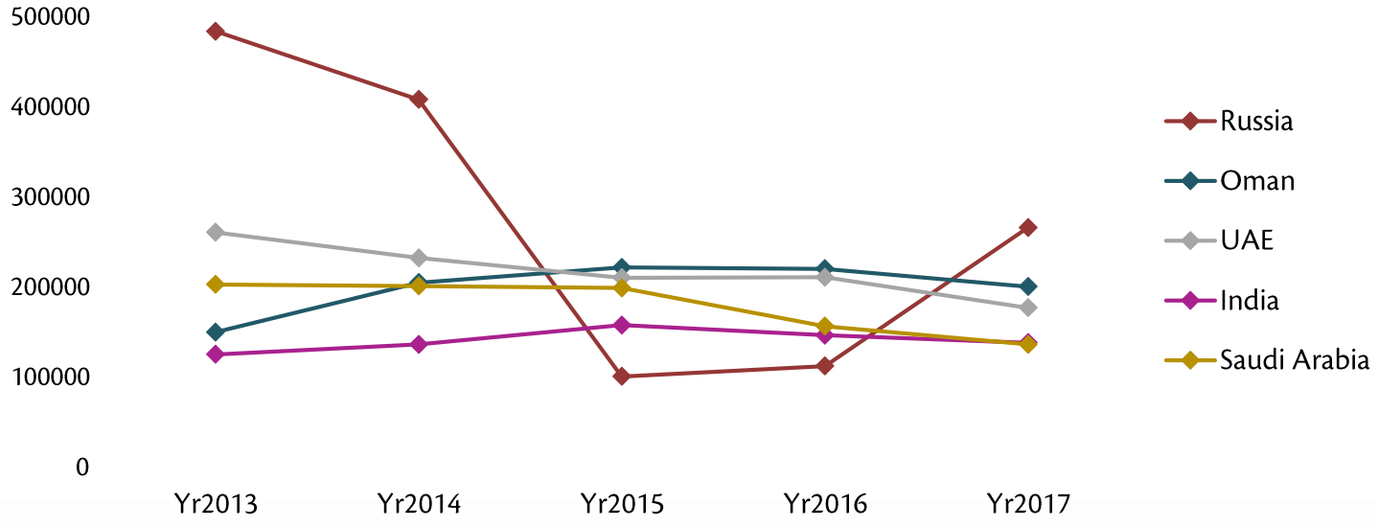
KEY SOURCE MARKETS

Core Markets			
Countries	Yr 2017 Guests	Market Share	CAGR Yr 2013 - 2017
Russia	266,086	15%	-11%
Oman	200,561	11%	6%
UAE	177,018	10%	-7%
India	138,227	8%	2%
Saudi Arabia	136,209	8%	-8%

Emerging Markets			
Countries	Yr 2017 Guests	Market Share	CAGR Yr 2013 - 2017
China	120,356	7%	51%
Egypt	58,201	3%	6%
Pakistan	58,001	3%	6%
Iraq	43,314	2%	3%
Jordan	41,654	2%	6%



DISCUSSION



Russia recovered during 2016-2017 and witnessed significant growth in guest figures by over 137%

DISCUSSION

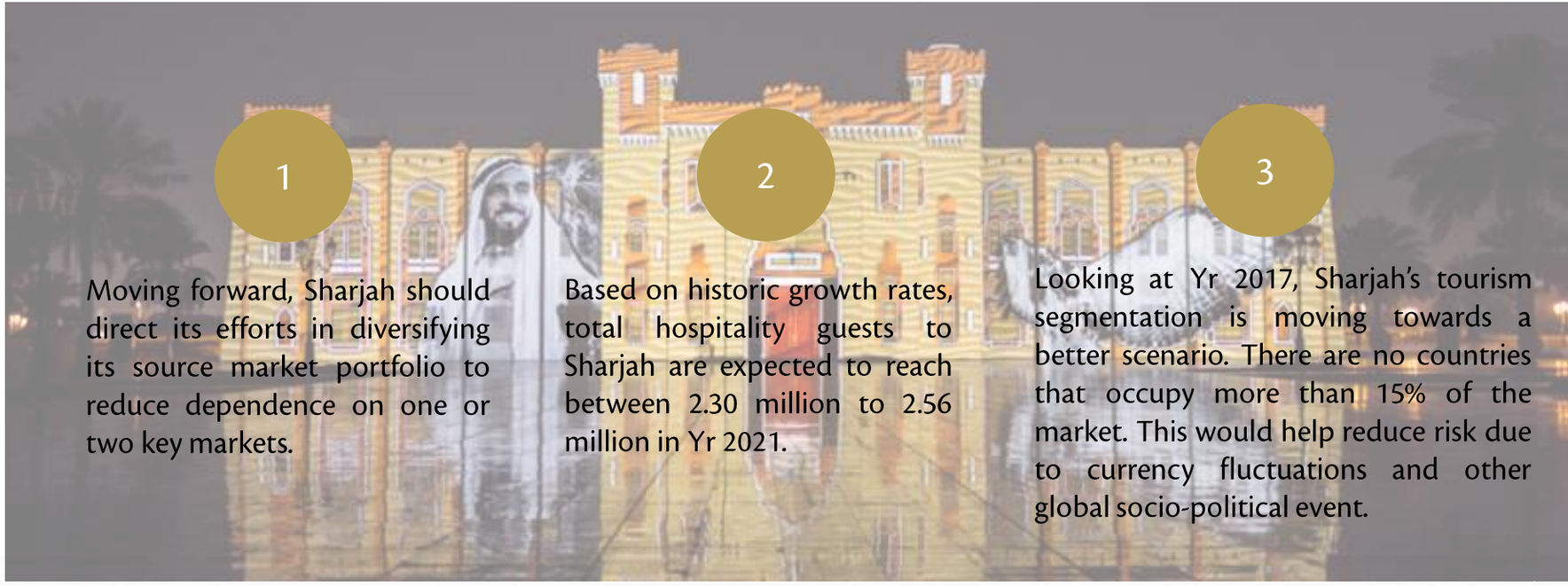
Russian tourists which was once the most important segment of Sharjah tourism have illustrated **positive signs this year** after few years of significant decline in tourist numbers.

Tourists from Russia witnessed a tremendous growth rate of **137% y-o-y this year (2017)**. Revamp of the Russian tourist market is expected to significantly impact the Sharjah tourism market.

CONCLUSION

DIVERSIFY

source market portfolio to reduce dependence on one or two key markets



1

Moving forward, Sharjah should direct its efforts in diversifying its source market portfolio to reduce dependence on one or two key markets.

2

Based on historic growth rates, total hospitality guests to Sharjah are expected to reach between 2.30 million to 2.56 million in Yr 2021.

3

Looking at Yr 2017, Sharjah's tourism segmentation is moving towards a better scenario. There are no countries that occupy more than 15% of the market. This would help reduce risk due to currency fluctuations and other global socio-political event.

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Thank You