# SHARJAH
# HOSPITALITY
# STATISTICS
# REPORT
## Q4 – 2023

Strategy – Research & Statistics Division

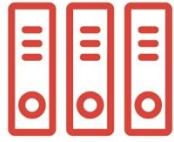February, 2024

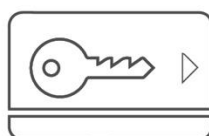# TABLE OF CONTENTS

# 4ᵗʰ Quarter - 2023

## Sharjah Hotel Main Indicators

**Table 1**: Sharjah Tourism Main Indicators – Q4 2023 vs. Q4 2022

| KEY PERFORMANCE INDICATORS | Guest | Occupancy Rate% | ALOS (Nights) |
|---|---|---|---|
| | 379,605 ▼ 5% | 68% ▼ 3% | 2.22 ▼ 2% |
| | **Total Revenue** AED **150** Million ▼ 13% | **RevPAR** AED **152** ▼ 12% | **ADR** AED **222** ▼ 8% |

**100 HOTEL**

**758,154 *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 |
|---|---|---|---|---|
| | 11 | 23 | 31 | 35 |
| | 89,884 | 251,215 | 216,902 | 200,153 |

| NOTE | Sharjah has over 10,500 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
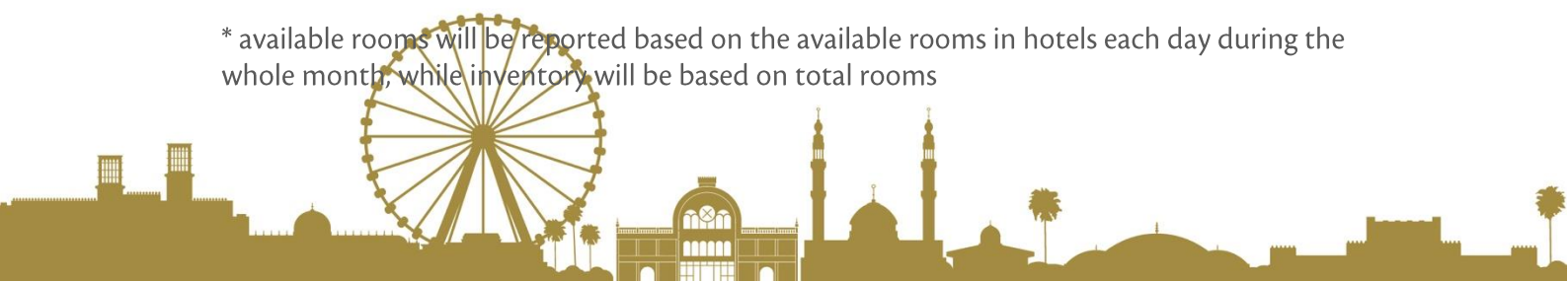
# HOSPITALITY
# SECTOR PERFORMANCE

**Figure 1**: top 5 source markets in Sharjah by nationality during Q4 (2022 – 2023)

■ 2022　■ 2023

| Nationality | 2022 | 2023 |
|---|---|---|
| Russia | 73,283 | 64,090 |
| UAE | 41,334 | 41,103 |
| India | 41,932 | 40,966 |
| Oman | 28,319 | 26,856 |
| Saudi Arabia | 20,118 | 19,302 |
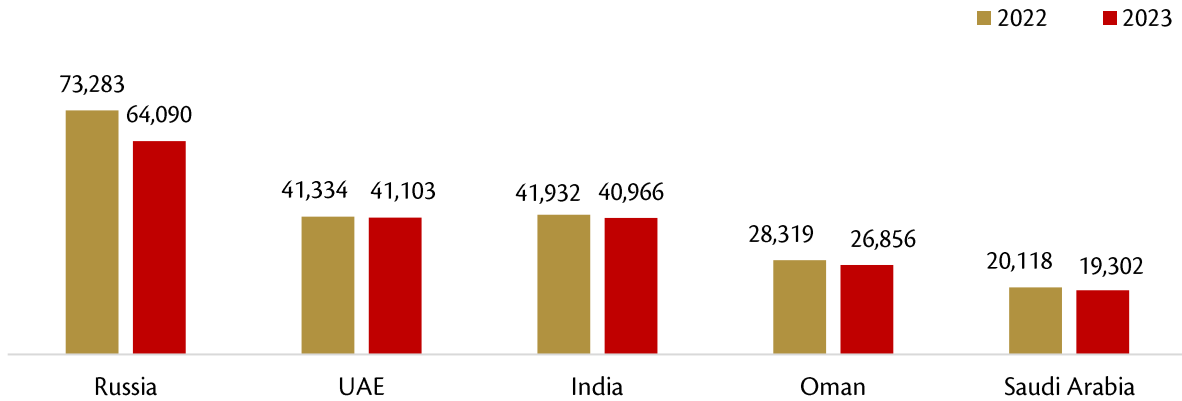
**Figure 2**: Hotel guests in Sharjah during fourth quarter 2022-2023

■ Y2022　■ Y2023

Thousands

| Month | Y2022 | Y2023 |
|---|---|---|
| Jan | 106 | 148 |
| Feb | 106 | 168 |
| Mar | 141 | 151 |
| Apr | 68 | 120 |
| May | 112 | 116 |
| Jun | 93 | 104 |
| Jul | 107 | 106 |
| Aug | 118 | 112 |
| Sep | 112 | 112 |
| Oct | 123 | 118 |
| Nov | 139 | 128 |
| Dec | 138 | 133 |
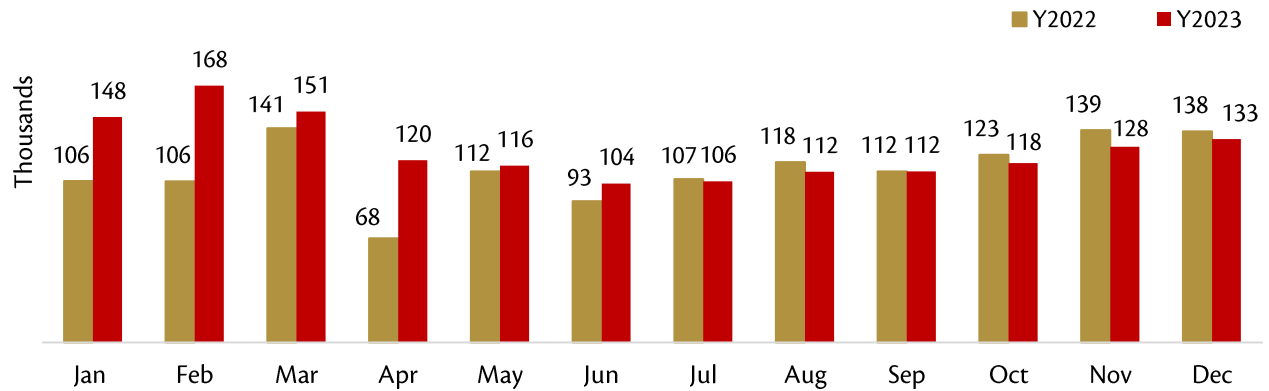
**Figure 3**: Hotel Establishments total revenue – Q4

Millions

| Year | Revenue |
|---|---|
| 2021 | 160 |
| 2022 | 173 |
| 2023 | 150 |
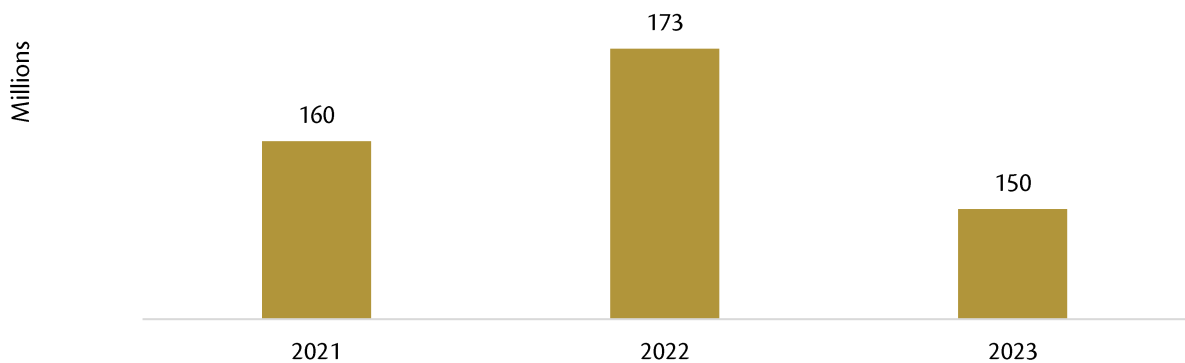
# KEY INDICATORS BY REGION

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

## SHARE %



- 6%
- 23%
- 14 %
- 2%
- 17%
- 23%
- 11%
- 4%
- 0%

## GROWTH %

| | | | |
|---|---|---|---|
| Russia, CIS & Baltics | 11% | ▼ |
| Americas | 12% | ▼ |
| GCC | 4% | ▼ |
| Arabs | 2% | ▼ |
| Europe Ex.Russia, CIS | 13% | ▼ |
| Asia | 1% | ▼ |
| Africa | 1% | ▼ |
| Australia & The Pacific | 12% | ▼ |
| UAE | 1% | ▼ |
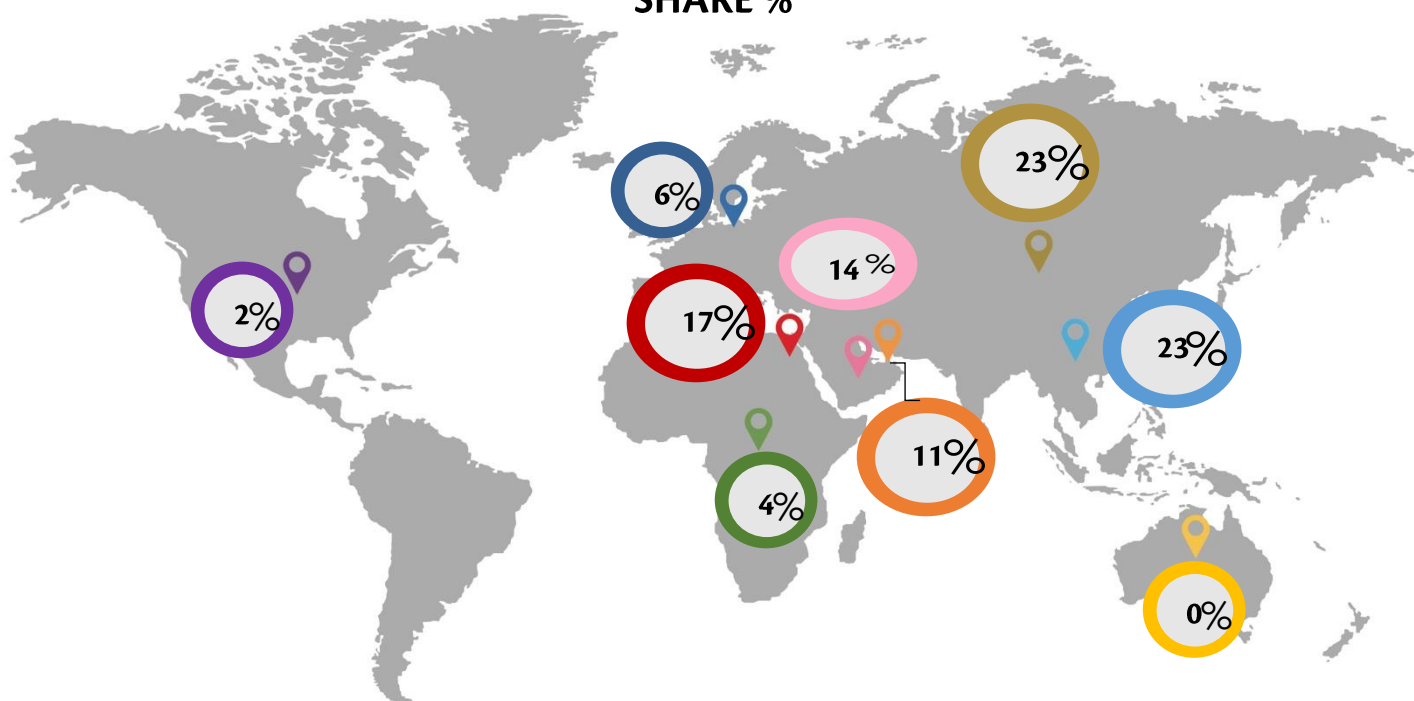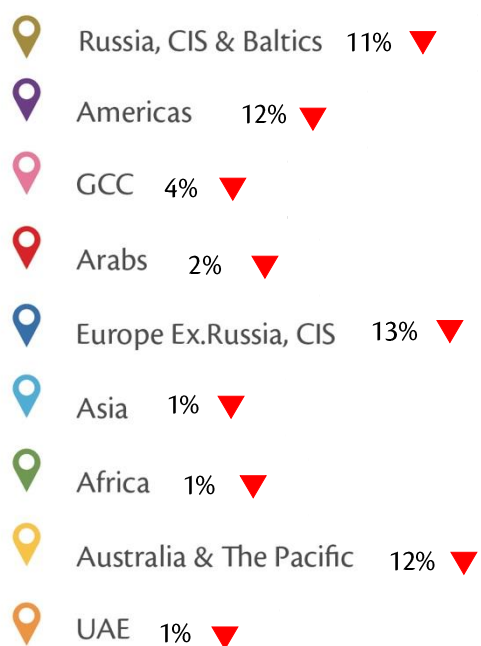
# TOP 20 SOURCE MARKETS

**Figure 5**: Market Share % for the Top 20 Source Markets during Q4 - 2023.
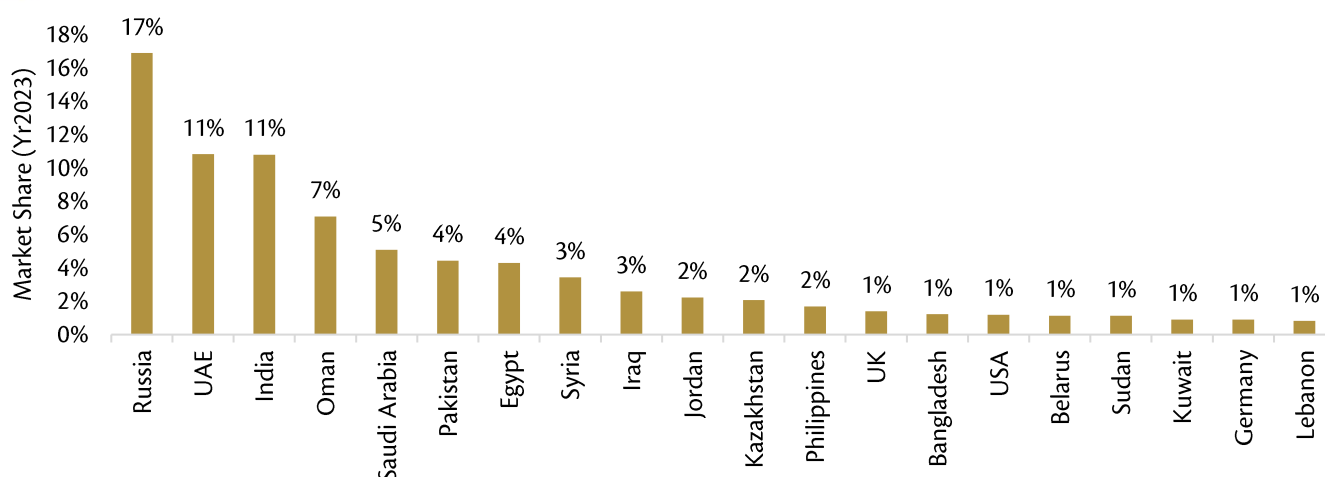


**Table 3:** Top 20 source markets

| Rank | Market | ALOS Nights | Nights Number | Change % |
|------|--------|-------------|---------------|----------|
| 1 | Russia | 2.85 | 182,685 | -13% |
| 2 | UAE | 1.77 | 72,883 | -1% |
| 3 | India | 2.05 | 83,895 | -2% |
| 4 | Oman | 1.42 | 38,002 | -5% |
| 5 | Saudi Arabia | 1.84 | 35,473 | -4% |
| 6 | Pakistan | 1.78 | 30,044 | 5% |
| 7 | Egypt | 2.49 | 40,553 | -3% |
| 8 | Syria | 2.16 | 28,119 | -2% |
| 9 | Iraq | 3.49 | 34,329 | 5% |
| 10 | Jordan | 2.16 | 18,287 | -4% |
| 11 | Kazakhstan | 3.30 | 25,975 | 0% |
| 12 | Philippines | 2.15 | 13,693 | 1% |
| 13 | UK | 2.04 | 10,760 | -8% |
| 14 | Bangladesh | 1.63 | 7,655 | 1% |
| 15 | USA | 2.35 | 10,645 | -11% |
| 16 | Belarus | 3.04 | 13,139 | -19% |
| 17 | Sudan | 2.32 | 9,943 | 3% |
| 18 | Kuwait | 2.31 | 7,948 | 5% |
| 19 | Germany | 2.16 | 7,344 | -18% |
| 20 | Lebanon | 2.51 | 7,908 | -2% |

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

**Figure 6:** Average Occupancy Rate - Q4
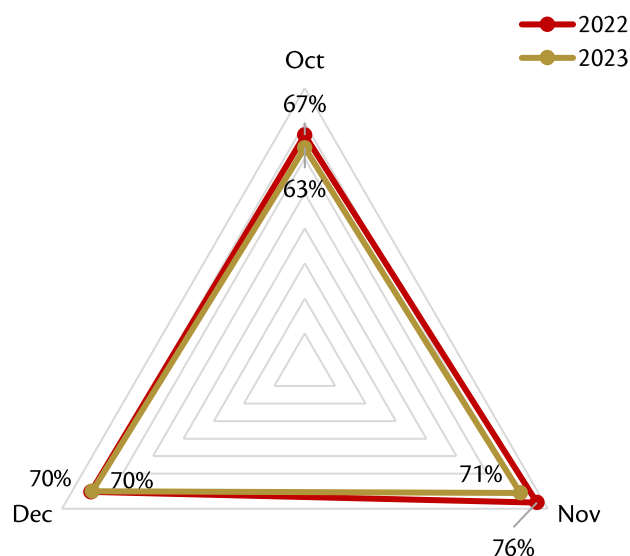
# KEY SOURCE MARKETS PERFORMANCE

**Table 4:** Key source markets performance

| India Month | Guest Yr2022 | Yr2023 | Growth% | | 2023 %Share | Guest Night Yr2022 | Yr2023 | Growth% | |
|---|---|---|---|---|---|---|---|---|---|
| October | 13,324 | 13,215 | ▼ | -1% | 11% | 28,823 | 28,439 | ▼ | -1% |
| November | 14,143 | 13,679 | ▼ | -3% | 11% | 26,898 | 27,669 | ▲ | 3% |
| December | 14,465 | 14,072 | ▼ | -3% | 11% | 27,904 | 27,786 | ▼ | 0% |
| **Q4** | **41,932** | **40,966** | ▼ | **-2%** | **11%** | **83,625** | **83,895** | ▲ | **0%** |
| China Month | Guest Yr2022 | Yr2023 | Growth% | | 2023 %Share | Guest Night Yr2022 | Yr2023 | Growth% | |
| October | 343 | 327 | ▼ | -5% | 0.3% | 826 | 761 | ▼ | -8% |
| November | 516 | 421 | ▼ | -18% | 0.3% | 1,081 | 921 | ▼ | -15% |
| December | 497 | 459 | ▼ | -8% | 0.3% | 975 | 948 | ▼ | -3% |
| **Q4** | **1,356** | **1,208** | ▼ | **-11%** | **0%** | **2,882** | **2,631** | ▼ | **-9%** |
| Russia Month | Guest Yr2022 | Yr2023 | Growth% | | 2023 %Share | Guest Night Yr2022 | Yr2023 | Growth% | |
| October | 23,843 | 18,927 | ▼ | -21% | 16% | 61,731 | 50,739 | ▼ | -18% |
| November | 24,995 | 21,961 | ▼ | -12% | 17% | 71,268 | 61,004 | ▼ | -14% |
| December | 24,445 | 23,203 | ▼ | -5% | 17% | 80,881 | 70,942 | ▼ | -12% |
| **Q4** | **73,283** | **64,090** | ▼ | **-13%** | **17%** | **213,880** | **182,685** | ▼ | **-15%** |
| GCC Month | Guest Yr2022 | Yr2023 | Growth% | | 2023 %Share | Guest Night Yr2022 | Yr2023 | Growth% | |
| October | 13,434 | 15,292 | ▲ | 14% | 13% | 22,052 | 24,281 | ▲ | 10% |
| November | 21,705 | 18,498 | ▼ | -15% | 14% | 38,541 | 31,411 | ▼ | -19% |
| December | 20,594 | 19,546 | ▼ | -5% | 15% | 36,191 | 33,801 | ▼ | -7% |
| **Q4** | **55,733** | **53,336** | ▼ | **-4%** | **14%** | **96,784** | **89,492** | ▼ | **-8%** |

*All GCC countries excluding UAE
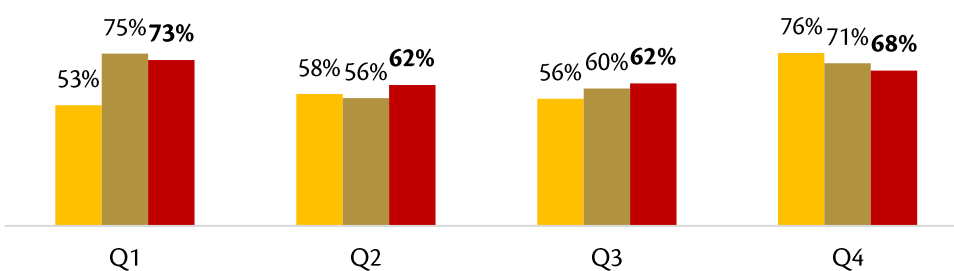


Key source markets growth during Q4 (2022-2023)
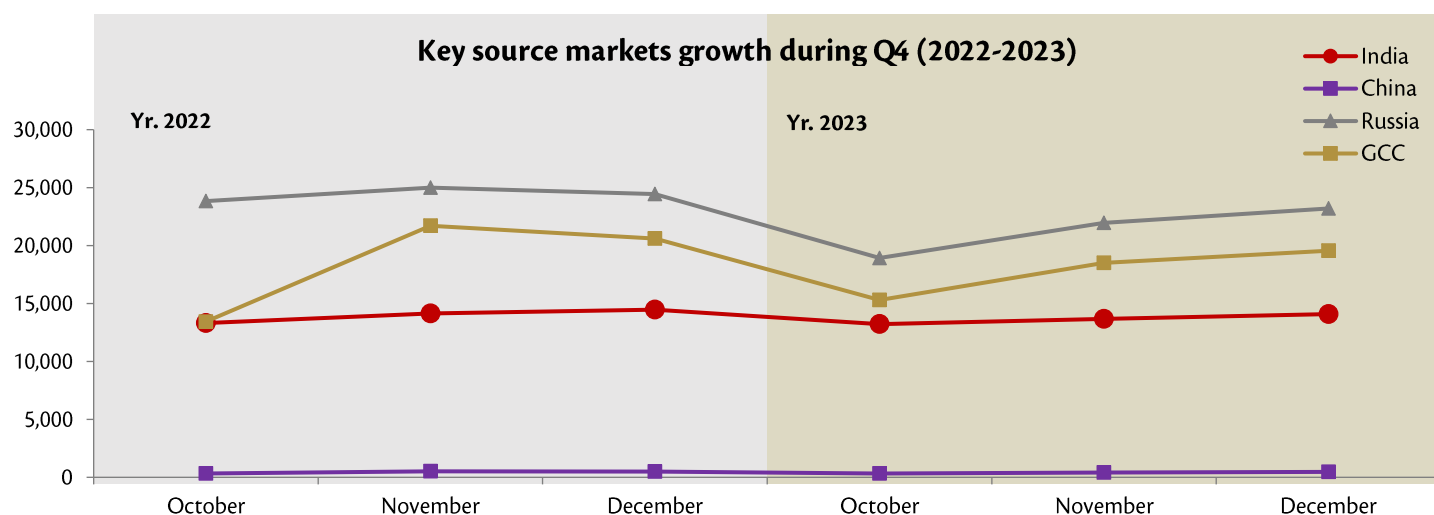
# SECTOR PERFORMANCE –
# KEY INDICATORS (QUARTERLY)

■ 2021  ■ 2022  ■ **2023**

## Revenue
(AED Million)

| | Q1 | Q2 | Q3 | Q4 |
|---|---|---|---|---|
| 2021 | 79 | 85 | 87 | 160 |
| 2022 | 150 | 97 | 108 | 173 |
| 2023 | **190** | **130** | **108** | **150** |

## Occupancy %

| | Q1 | Q2 | Q3 | Q4 |
|---|---|---|---|---|
| 2021 | 53% | 58% | 56% | 76% |
| 2022 | 75% | 56% | 60% | 71% |
| 2023 | **73%** | **62%** | **62%** | **68%** |

## ALOS
(DAYS)

| | Q1 | Q2 | Q3 | Q4 |
|---|---|---|---|---|
| 2021 | 1.83 | 2.25 | 2.33 | 2.64 |
| 2022 | 2.34 | 2.17 | 2.15 | 2.27 |
| 2023 | **2.00** | **2.13** | **2.15** | **2.22** |

## REVPAR
(AED)

| | Q1 | Q2 | Q3 | Q4 |
|---|---|---|---|---|
| 2021 | 92 | 95 | 93 | 178 |
| 2022 | 168 | 101 | 109 | 172 |
| 2023 | **183** | **130** | **115** | **152** |

## ADR
(AED)

| | Q1 | Q2 | Q3 | Q4 |
|---|---|---|---|---|
| 2021 | 174 | 164 | 167 | 236 |
| 2022 | 223 | 181 | 181 | 241 |
| 2023 | **252** | **211** | **184** | **222** |
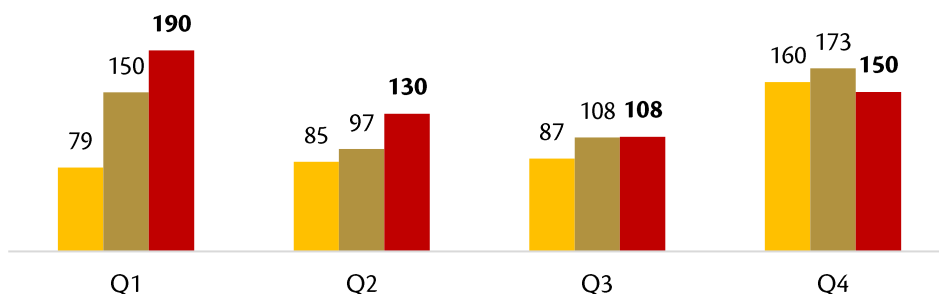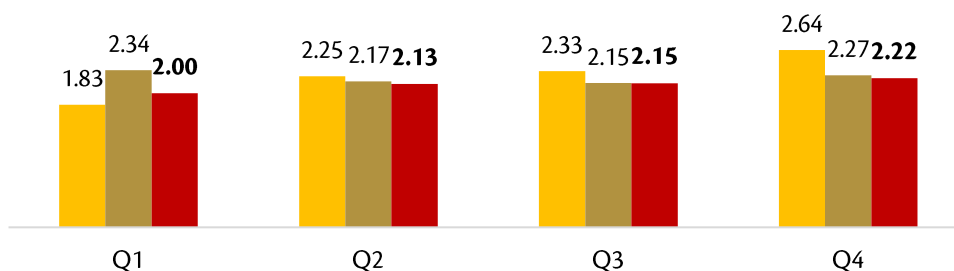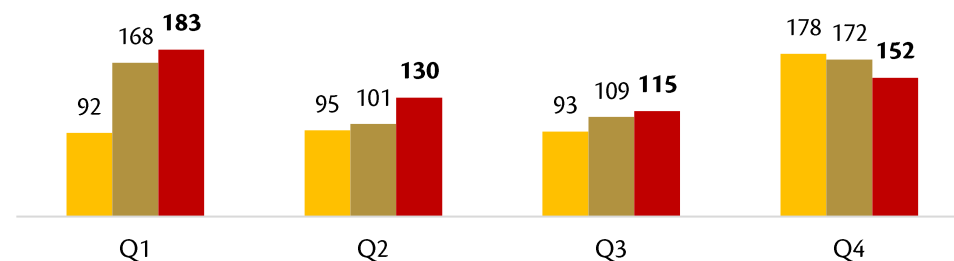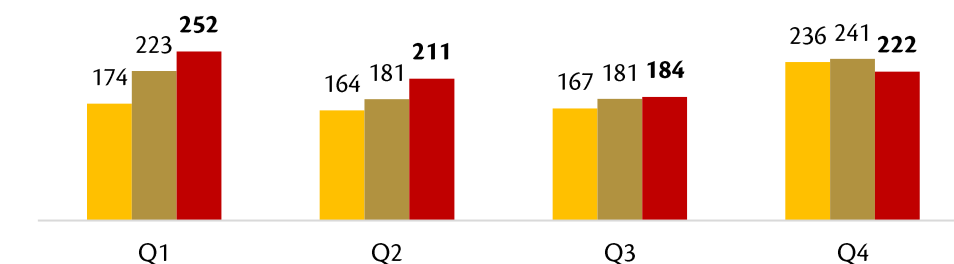
# SECTOR PERFORMANCE – KEY INDICATORS (MONTHLY)

**2023** (red bars) — 2022 (yellow line)

## Revenue (AED Million)

| | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2023 | 58 | 68 | 64 | 49 | 44 | 37 | 36 | 36 | 36 | 40 | 51 | 59 |
| 2022 | 49 | 44 | 57 | 29 | 39 | 29 | 35 | 37 | 36 | 45 | 63 | 66 |

## Occupancy %

| | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2023 | 64% | 83% | 71% | 59% | 63% | 63% | 63% | 62% | 62% | 63% | 71% | 70% |
| 2022 | 73% | 73% | 80% | 48% | 60% | 60% | 58% | 62% | 60% | 67% | 76% | 70% |

## ALOS (DAYS)

| | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2023 | 1.97 | 1.89 | 2.12 | 2.17 | 2.09 | 2.14 | 2.14 | 2.16 | 2.14 | 2.17 | 2.21 | 2.28 |
| 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 |

## REVPAR (AED)

| | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2023 | 166 | 210 | 172 | 135 | 136 | 119 | 118 | 115 | 113 | 125 | 160 | 171 |
| 2022 | 156 | 154 | 195 | 85 | 122 | 97 | 108 | 111 | 108 | 140 | 189 | 187 |

## ADR (AED)

| | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2023 | 259 | 253 | 243 | 229 | 215 | 190 | 187 | 184 | 181 | 196 | 224 | 245 |
| 2022 | 214 | 211 | 243 | 178 | 202 | 162 | 185 | 180 | 178 | 210 | 247 | 265 |

# KEY INDICATORS PER HOTEL TYPE

**Table 5:** Hotels performance by classification

| ★★★★★ 5-Star Number of Hotels: 11 | | | | | |
|---|---|---|---|---|---|
| Available Rooms | 89,884 | | | | |
| Occupancy | 67% | | | | |
| ALOS | 2.05 | | | | |
| RevPAR | 246 | | | | |
| Top 5 Nationalities | **1**) Russia | **2**) UAE | **3**) KSA | **4**) India | **5**) Oman |

| ★★★★ 4-Star Number of Hotels: 23 | | | | | |
|---|---|---|---|---|---|
| Available Rooms | 251,215 | | | | |
| Occupancy | 70% | | | | |
| ALOS | 2.18 | | | | |
| RevPAR | 176 | | | | |
| Top 5 Nationalities | **1**) Russia | **2**) UAE | **3**) Oman | **4**) India | **5**) KSA |

| ★★★ 3-Star Number of Hotels: 13 | | | | | |
|---|---|---|---|---|---|
| Available Rooms | 134,332 | | | | |
| Occupancy | 68% | | | | |
| ALOS | 2.38 | | | | |
| RevPAR | 140 | | | | |
| Top 5 Nationalities | **1**) India | **2**) Russia | **3**) Oman | **4**) UAE | **5**) KSA |

| ★★ 2-Star Number of Hotels: 9 | | | | | |
|---|---|---|---|---|---|
| Available Rooms | 54,882 | | | | |
| Occupancy | 71% | | | | |
| ALOS | 2.34 | | | | |
| RevPAR | 84 | | | | |
| Top 5 Nationalities | **1**) India | **2**) Oman | **3**) Pakistan | **4**) UAE | **5**) KSA |

| ★ 1-Star Number of Hotels: 9 | | | | | |
|---|---|---|---|---|---|
| Available Rooms | 27,689 | | | | |
| Occupancy | 58% | | | | |
| ALOS | 2.13 | | | | |
| RevPAR | 67 | | | | |
| Top 5 Nationalities | **1**) India | **2**) Pakistan | **3**)Bangladesh | **4**) Oman | **5**) Egypt |

| Deluxe Number of Hotels: 5 | | | | | |
|---|---|---|---|---|---|
| Available Rooms | 73,248 | | | | |
| Occupancy | 69% | | | | |
| ALOS | 2.31 | | | | |
| RevPAR | 135 | | | | |
| Top 5 Nationalities | **1**) UAE | **2**) India | **3**) KSA | **4**) Oman | **5**) Iraq |

| Standard Number of Hotels: 8 | | | | | |
|---|---|---|---|---|---|
| Available Rooms | 60,376 | | | | |
| Occupancy | 62% | | | | |
| ALOS | 2.00 | | | | |
| RevPAR | 129 | | | | |
| Top 5 Nationalities | **1**) India | **2**) Egypt | **3**) Oman | **4**) Iraq | **5**) UAE |

| Basic Number of Hotels: 22 | | | | | |
|---|---|---|---|---|---|
| Available Rooms | 66,529 | | | | |
| Occupancy | 68% | | | | |
| ALOS | 2.49 | | | | |
| RevPAR | 92 | | | | |
| Top 5 Nationalities | **1**) India | **2**) Pakistan | **3**) Oman | **4**) Egypt | **5**) Russia |

**Sharjah**

# Jan to Dec - 2023

## Sharjah Hotel Guests

**Table 6:** Sharjah Tourism Main Indicators –2023 vs. 2022

| KEY PERFORMANCE INDICATORS | Guest | Occupancy Rate% | ALOS (days) |
|---|---|---|---|
| | 1,517,232 ▲ 11% | 66% ▶ 0% | 2.12 ▼ 5% |
| | **Total Revenue** | **RevPAR** | **ADR** |
| | AED **578 M** ▲ 10% | AED **146** ▲ 6% | AED **220** ▲ 5% |

**103 HOTEL**
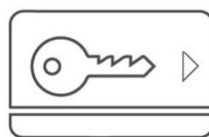
**2.98 M * ROOMS Available**

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

| STAR RATING | 5 STAR | 4 STAR | 1 - 3 STAR | APTS |
|---|---|---|---|---|
| | 12 | 22 | 32 | 37 |
| | 362,675 | 1.01 M | 875,328 | 738,416 |

| 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

# 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.

$$RevPAR = Occupancy\ x\ ADR$$

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