SHARJAH HOSPITALITY

STATISTICS REPORT

Year - 2023

Strategy – Research & Statistics Division

March, 2024

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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 2023.

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

Year - 2023

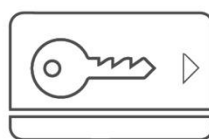## Sharjah Hotel Guests

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

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 2: Average number of Operating Hotels and 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 10,700 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
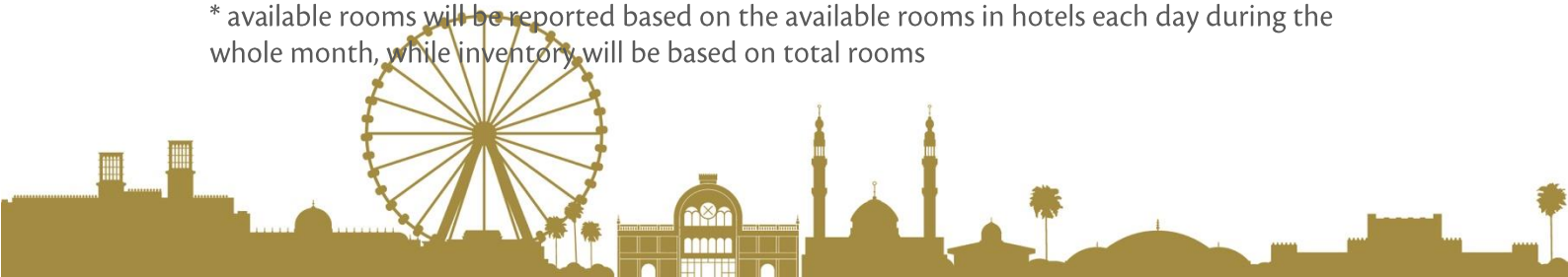
HOSPITALITY
SECTOR PERFORMANCE

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

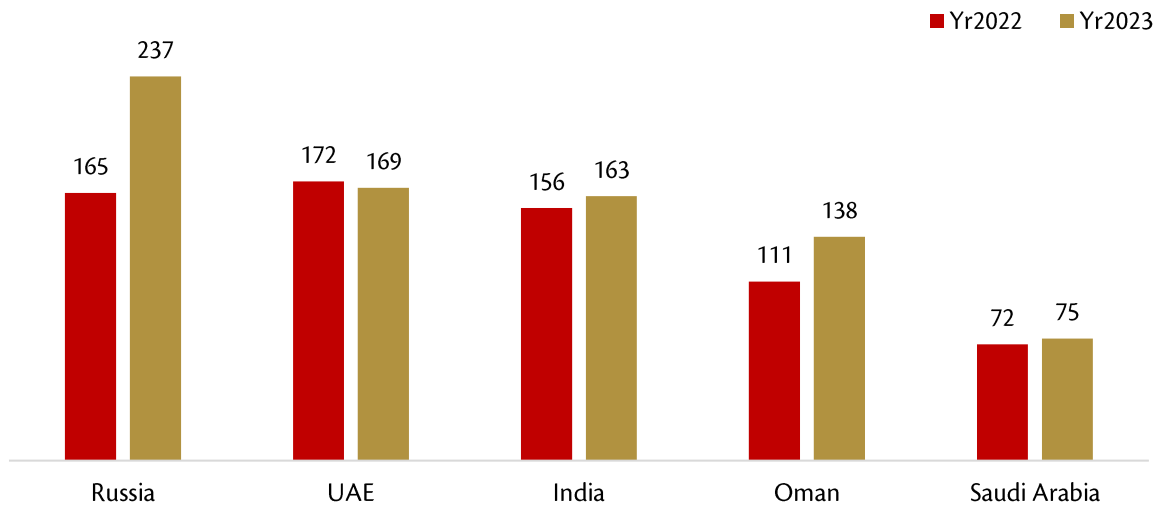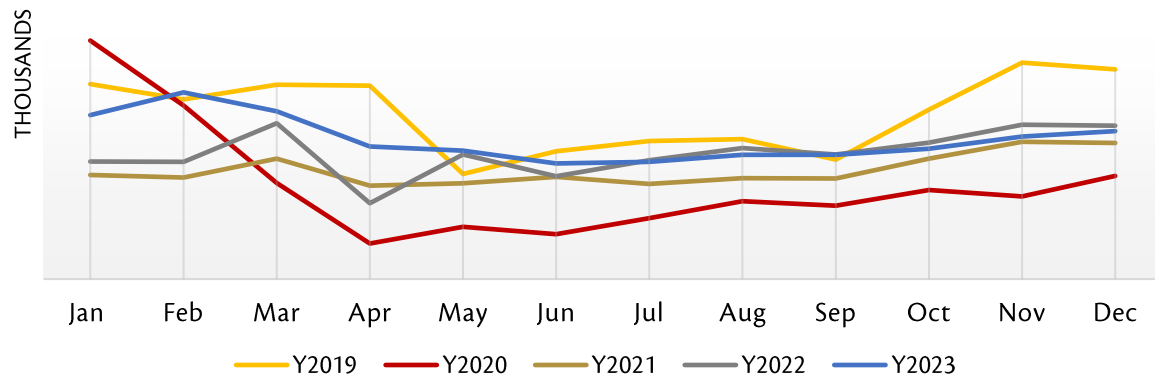**Figure 2**: Hotel guests seasonality trend in Sharjah during 2022-2023

Tourism sector in Sharjah had a powerful start in 2023 with about 33% growth rate in number of guests during Q1, and 24% in Q2. Additionally, Russian Market dominated the sector with over 44% growth rate over the year (figure 1). Furthermore, visitors from the GCC also increased more than 17% and back to levels before the pandemic.

HOSPITALITY SECTOR PERFORMANCE

Overall, the tourism sector in Sharjah witnessed a positive increase in the number of hotel establishment guests by over 11%.reflecting a more robust growth over the years (figure 3).

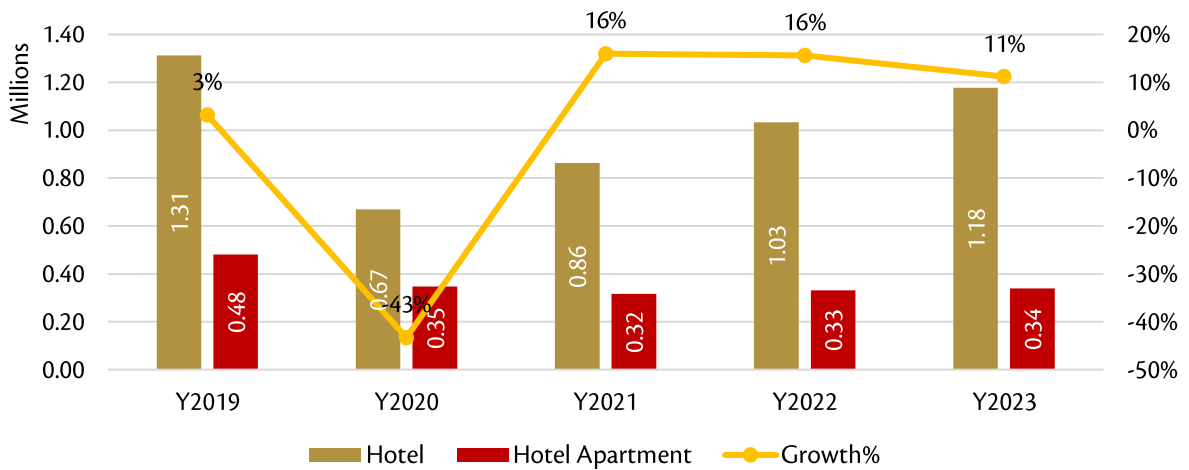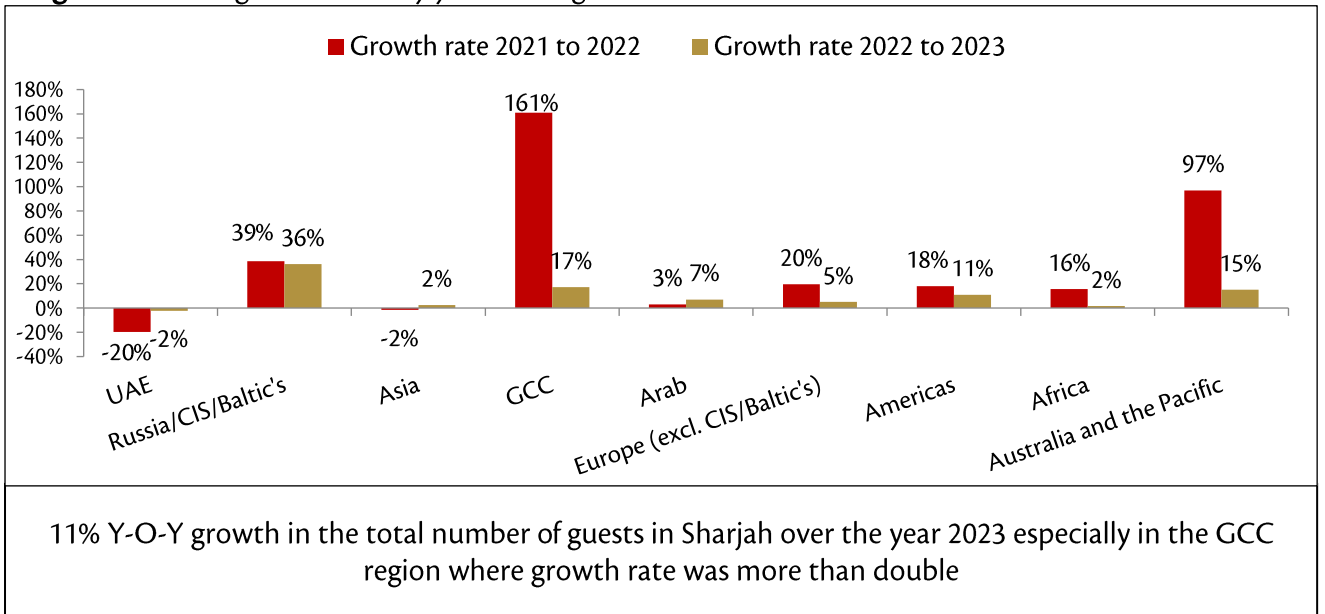**Figure 3**: Guests by Hotel type for period (2019 – 2023)

Figure 4: Guests growth rates by year and region

11% Y-O-Y growth in the total number of guests in Sharjah over the year 2023 especially in the GCC region where growth rate was more than double

HOSPITALITY SECTOR PERFORMANCE

Figure 5: Guest Growth Rates Monthly Trend in 2022 and 2023
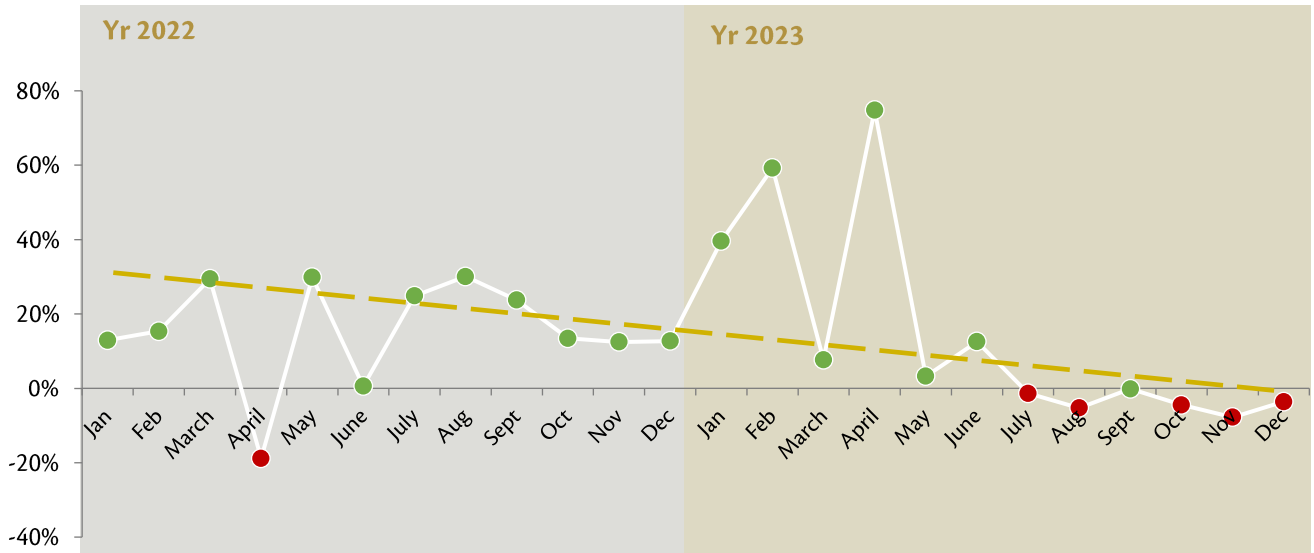
The seasonal fluctuations in the Sharjah tourism sector can be seen clearly during high seasons in quarters one and two which starts declining in quarter three as shown in figure 5. Additionally, the Sharjah hospitality sector has also reflected positive growths in terms of hotel establishments revenues, which increased by 10% (figure 7). Overall, we can see some jumps in hotel guest numbers in 2023 during months of February and April which coincides with some national holidays like Ramadan and Eid Al Fitr. Furthermore, the hotel industry has recently focused more on sustainability objectives such as energy efficiency and waste management which have been more appealing to guests as they help in preserving the environment. As such the future outlook is positive, and our sector is once again showing its resilience and ability to withstand any potential future shocks.

SECTOR PERFORMANCE
REVENUE & REVPAR

Figure 6: Revenue Per Available Room (REVPAR) by Hotel Type (2019 – 2023)

AED

Year	Hotel	Hotel Apartment
2019	125	105
2020	88	82
2021	122	105
2022	150	112
2023	156	115

■ Hotel ■ Hotel Apartment
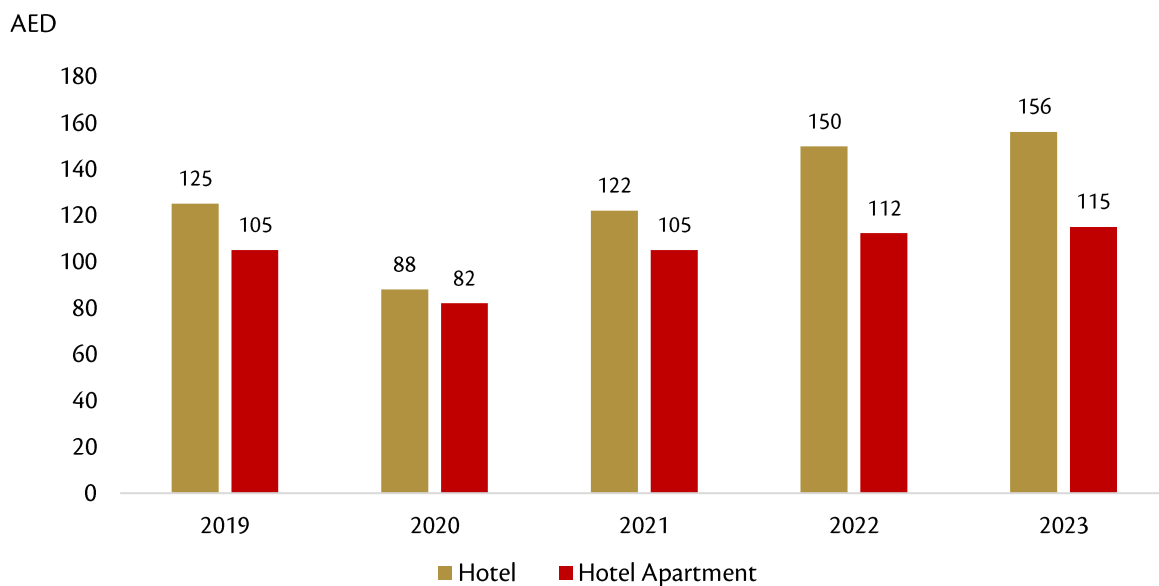
Figure 7: Hotel Establishment Revenue by Type of revenue (2019 – 2023)

Millions

Year	Lodging Revenue	Other & F&B Revenue	Total
2019	411	163	573
2020	211	70	280
2021	309	102	411
2022	404	123	527
2023	437	141	578

■ Lodging Revenue ■ Other & F&B Revenue
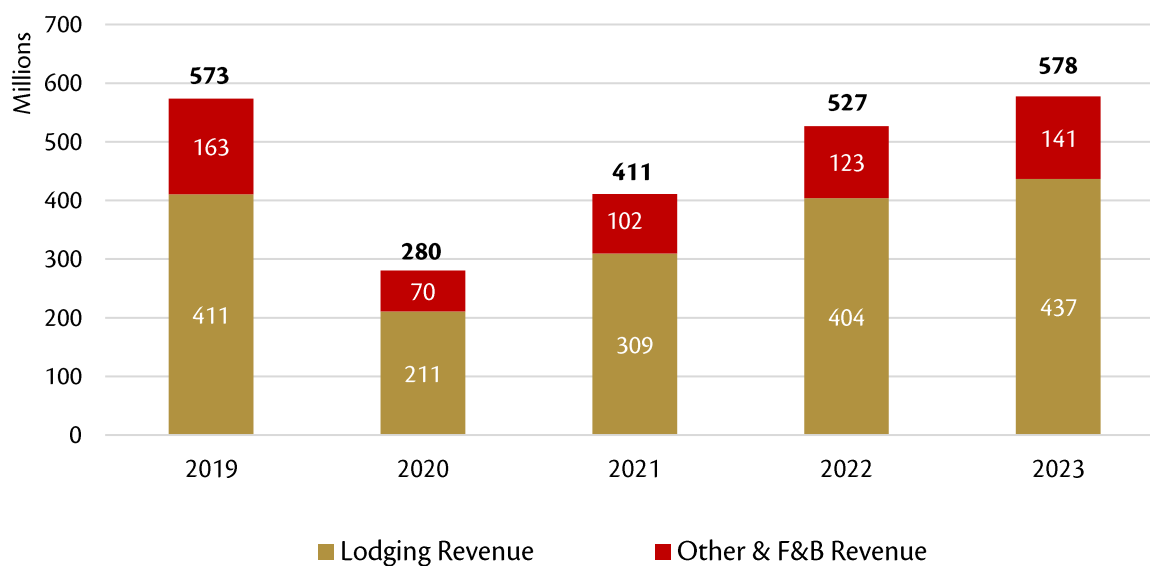
KEY INDICATORS ANALYSIS PER HOTEL TYPE: *HOTELS*

Figure 8: Hotels occupancy rate & REVPAR by Hotel classification

Sharjah Hotels: Occupancy Rates

67% Sharjah Yr. 2023 Average Hotel Occupancy Rate

Three- & Four-Star hotels registered an average occupancy rate of 68% during Yr2023, registering the highest among the other classifications Whereas **Five- & Two-Star** hotels followed with 65% occupancy rate each.

A. Hotel Occupancy Rates (Yr 2023)

2023 Overall Hotel Segment: 67%
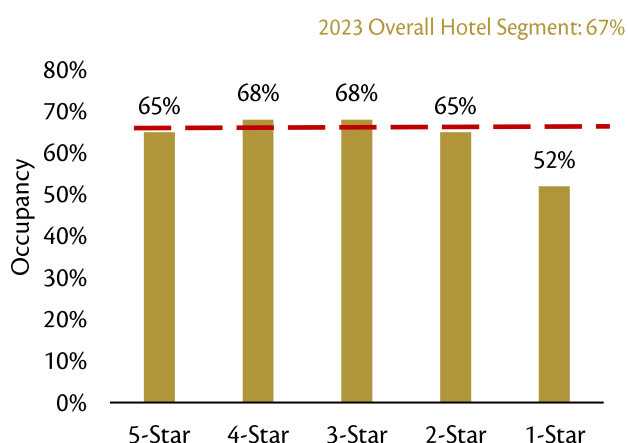
Sharjah Hotels: RevPAR

156AED Sharjah Yr. 2023 Average Hotel RevPAR

In respect to RevPAR, **Five Star** hotels registered the highest RevPAR (AED 242) in Yr2023 showing an increase of 3% from last year. Whereas, the **Four Star** and **Three Star** hotels registered an increased in REVPAR of 8% and 1% respectively

B. Hotel RevPAR (Yr 2023)

2023 Overall Hotel Segment: 156

KEY INDICATORS ANALYSIS PER HOTEL TYPE: *HOTEL APARTMENTS*

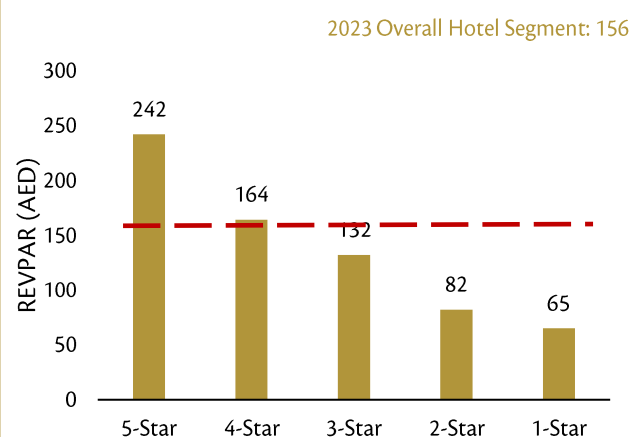**Figure 9**: Hote Apartment occupancy rate & REVPAR by classification

Sharjah Hotel Apartment: Occupancy Rates

65% Sharjah Yr. 2023 Average Hotel Apt. Occupancy Rate

Deluxe hotel apartments occupancy rate registered the highest levels with 70% and increasing 5% from last year. Basic apartments maintained its levels at 65%, while standards apartments witnessed a drop of 5%.

A. Hotel Apartment Occupancy Rates (Yr. 2023)

2023 Overall Hotel Apt. Segment: 65%

	Deluxe	Standard	Basic
Occupancy	70%	58%	65%
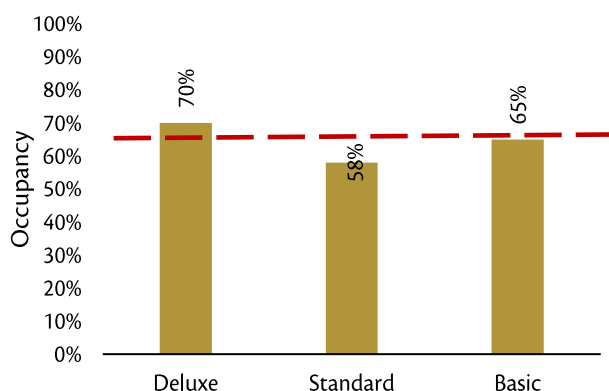
Sharjah Hotel Apartment: RevPAR

115 AED Sharjah Yr 2023 Average Hotel Apt. RevPAR

Deluxe hotel apartments also registered the highest RevPAR of AED 145 during the Yr. 2023 followed by **Standard** apartment with AED 115, while, **Basic** apartments remained below sector average with only AED 86 revenue per available room.

B. Hotel Apartment RevPAR (Yr. 2023)

2023 Overall Hotel Apt. Segment: 115

	Deluxe	Standard	Basic
REVPAR (AED)	145	115	86
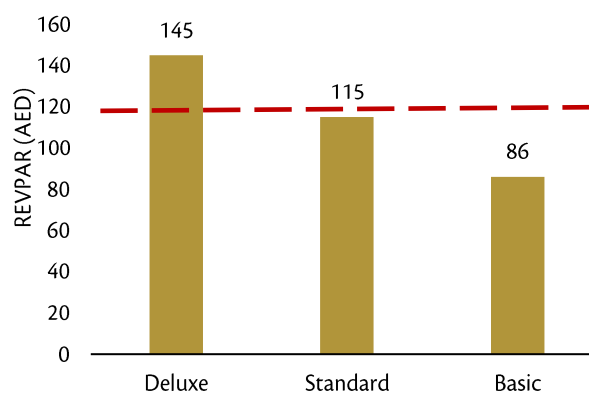
TOP 20 SOURCE MARKETS

Figure 10: Market Share % for the Top 20 Source Markets during Year 2023.
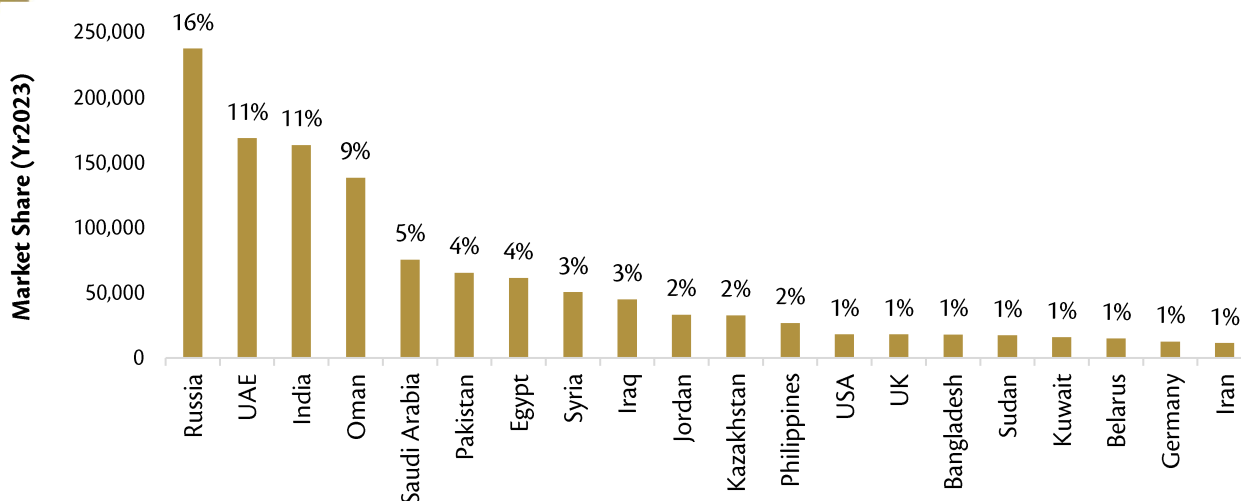
Table 3: Top 20 source markets based on guest arriavals

Rank	Market	ALOS Nights	Nights Number	Change %
1	Russia	2.77	657,292	44%
2	UAE	1.65	278,599	-2%
3	India	2.08	339,153	5%
4	Oman	1.31	180,718	25%
5	Saudi Arabia	1.71	128,655	5%
6	Pakistan	1.74	113,523	1%
7	Egypt	2.43	149,058	8%
8	Syria	2.14	108,249	5%
9	Iraq	3.29	147,611	14%
10	Jordan	2.05	68,154	9%
11	Kazakhstan	2.80	91,119	16%
12	Philippines	2.11	56,457	-7%
13	USA	2.23	40,665	13%
14	UK	2.09	37,790	9%
15	Bangladesh	1.53	27,296	5%
16	Sudan	2.23	39,043	3%
17	Kuwait	2.25	35,692	12%
18	Belarus	2.70	40,363	51%
19	Germany	2.14	26,756	2%
20	Iran	2.51	28,777	4%

*change% based on guest numbers compared to 2022

Figure 11: Evolution in the number of (000) Hotels Guest
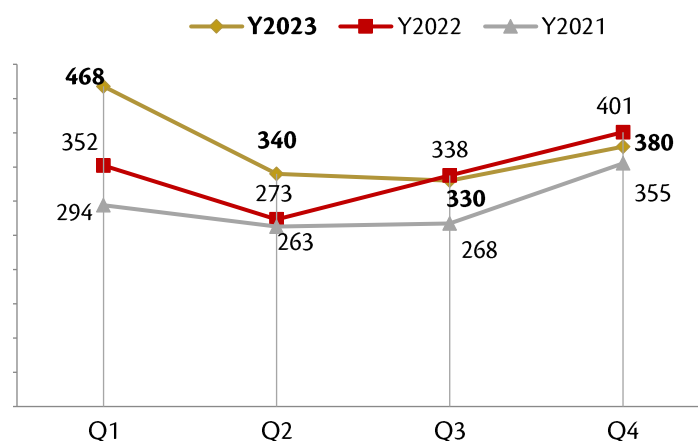
KEY SOURCE MARKETS PERFORMANCE

Table 4: Key source markets performance

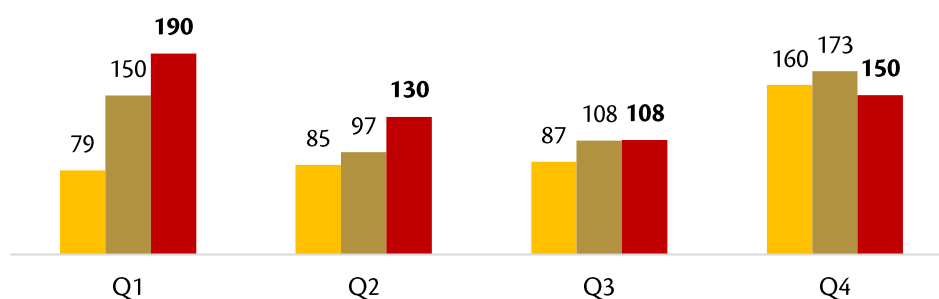| India Quarter	Guest Yr2022	Guest Yr2023	Growth%		2023 %Share	Guest Night Yr2022	Guest Night Yr2023	Growth%	
Q1	40,613	42,663	▲	5%	9%	99,139	84,312	▼	-15%
Q2	34,986	41,387	▲	18%	12%	81,513	86,888	▲	7%
Q3	38,547	38,313	▼	-1%	12%	83,382	84,058	▲	1%
Q4	41,932	40,966	▼	-2%	11%	83,625	83,895	▲	0%
Total	**156,078**	**163,329**	▲	**5%**	**11%**	**347,659**	**339,153**	▼	**-2%**
China Quarter	**Guest Yr2022**	**Guest Yr2023**	**Growth%**		**2022 %Share**	**Guest Night Yr2022**	**Guest Night Yr2023**	**Growth%**	
Q1	1,817	2,717	▲	50%	1%	4,225	6,060	▲	43%
Q2	2,163	1,755	▼	-19%	1%	3,100	3,096	▼	0%
Q3	961	1,102	▲	15%	0%	2,314	2,404	▲	4%
Q4	1,356	1,208	▼	-11%	0%	2,882	2,631	▼	-9%
Total	**6,297**	**6,782**	▲	**8%**	**0%**	**12,521**	**14,191**	▲	**13%**
Russia Quarter	**Guest Yr2022**	**Guest Yr2023**	**Growth%**		**2022 %Share**	**Guest Night Yr2022**	**Guest Night Yr2023**	**Growth%**	
Q1	34,807	76,589	▲	120%	16%	98,170	200,973	▲	105%
Q2	21,018	61,828	▲	194%	18%	53,698	170,510	▲	218%
Q3	36,242	34,849	▼	-4%	11%	109,077	103,124	▼	-5%
Q4	73,283	64,090	▼	-13%	17%	213,880	182,685	▼	-15%
Total	**165,350**	**237,356**	▲	**44%**	**16%**	**474,825**	**657,292**	▲	**38%**
GCC* Quarter	**Guest Yr2022**	**Guest Yr2023**	**Growth%**		**2022 %Share**	**Guest Night Yr2022**	**Guest Night Yr2023**	**Growth%**	
Q1	58,322	97,406	▲	67%	21%	99,852	137,777	▲	38%
Q2	42,410	42,941	▲	1%	13%	67,130	67,187	▲	0%
Q3	55,340	54,553	▼	-1%	17%	87,150	86,384	▼	-1%
Q4	55,733	53,336	▼	-4%	14%	96,784	89,492	▼	-8%
Total	**211,805**	**248,236**	▲	**17%**	**16%**	**350,916**	**380,840**	▲	**9%**

*All GCC countries excluding UAE

SECTOR PERFORMANCE –
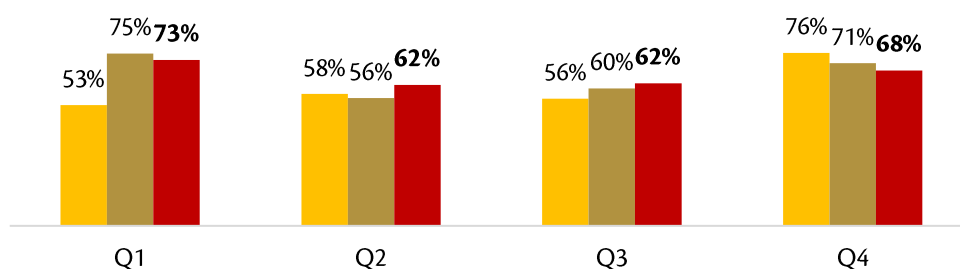# KEY INDICATORS (QUARTERLY)

Figure 12: main indicators by quarter during Years 2021 - 2023

■ 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**
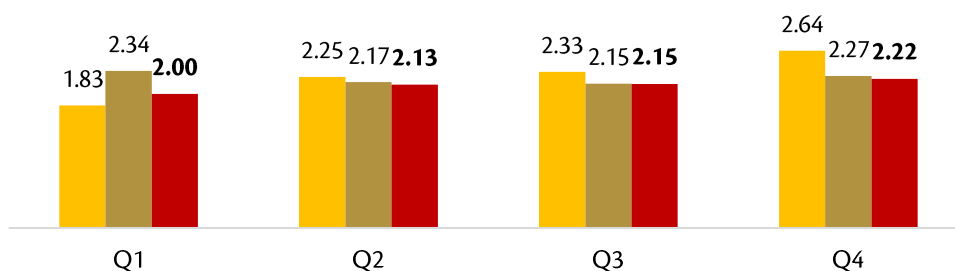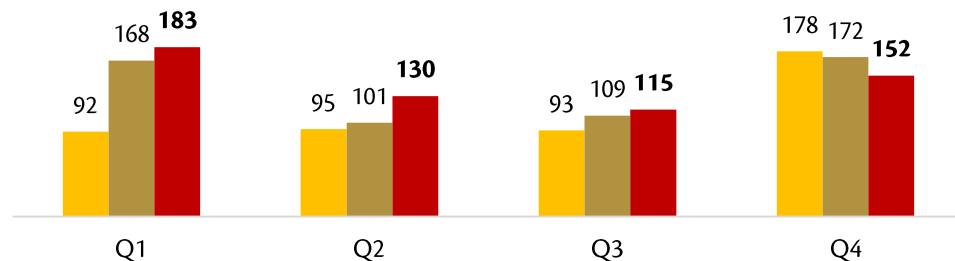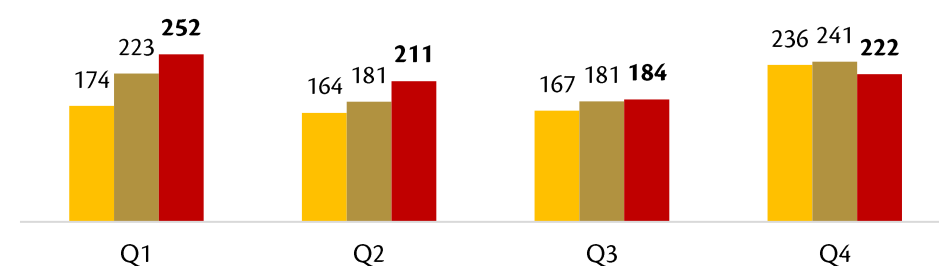
SECTOR PERFORMANCE – KEY INDICATORS (MONTHLY)

Figure 13: monthly main indicators during Years 2022 - 2023
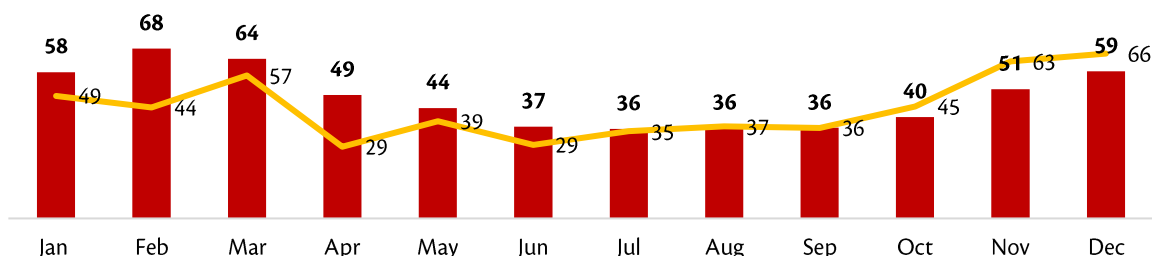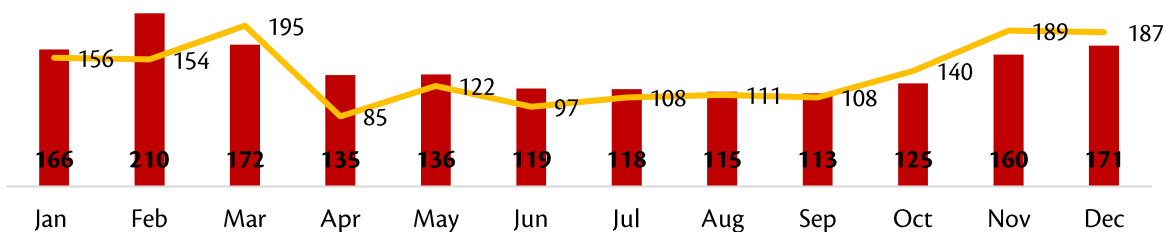

Legend: ■ 2023 ── 2022

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 BY REGION

SHARE %

- 6%
- 21%
- 16 %
- 2%
- 17%
- 23%
- 3%
- 11%
- 0%

GROWTH %

- Russia, CIS & Baltics   36% ▲
- Americas   11% ▲
- GCC   17% ▲
- Arabs   7% ▲
- Europe Ex.Russia, CIS   5% ▲
- Asia   2% ▲
- Africa   2% ▲
- Australia & The Pacific   15% ▲
- UAE   2% ▼
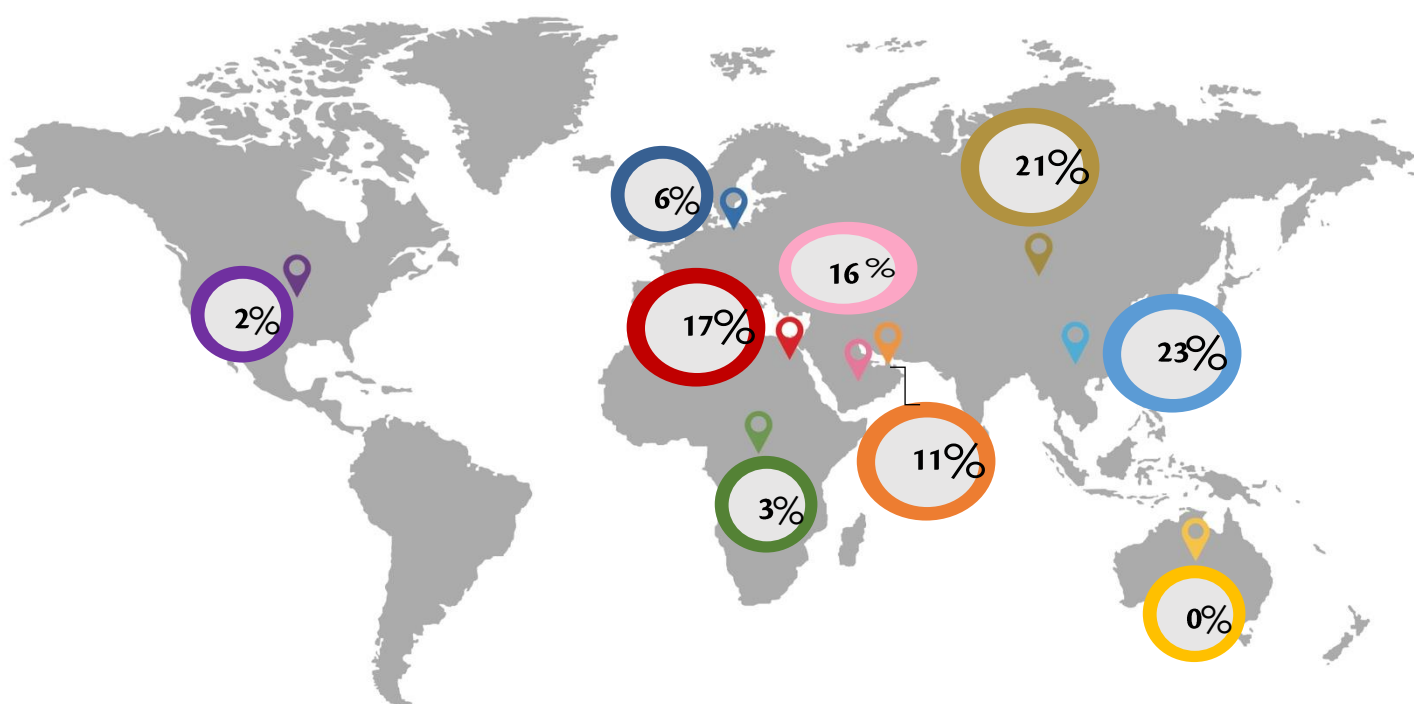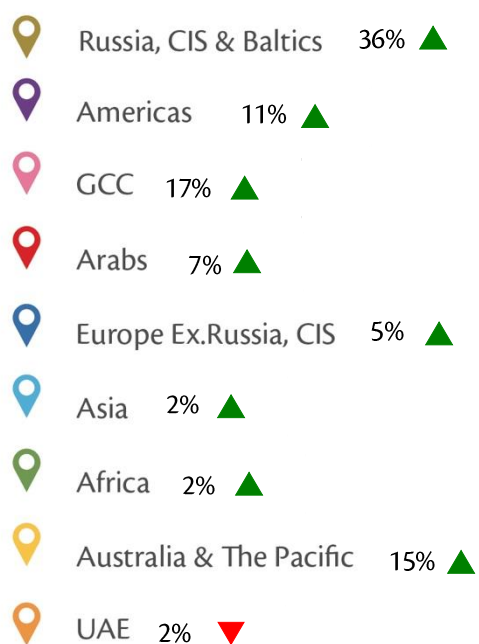
KEY INDICATORS PER HOTEL TYPE

Table 5: Hotels performance by classification during Year 2023

★★★★★ **5-Star** Number of Hotels: 12	Available Rooms	362,675				
	Occupancy	65%				
	ALOS	1.99				
	RevPAR	242				
	Top 5 Nationalities	**1**) Russia	**2**) UAE	**3**) Oman	**4**) KSA	**5**) India
★★★★ **4-Star** Number of Hotels: 22	Available Rooms	1,011,731				
	Occupancy	68%				
	ALOS	2.00				
	RevPAR	163				
	Top 5 Nationalities	**1**) Russia	**2**) UAE	**3**) Oman	**4**) India	**5**) KSA
★★★ **3-Star** Number of Hotels: 13	Available Rooms	553,556				
	Occupancy	68%				
	ALOS	2.34				
	RevPAR	132				
	Top 5 Nationalities	**1**) India	**2**) Oman	**3**) Russia	**4**) UAE	**5**) KSA
★★ **2-Star** Number of Hotels: 10	Available Rooms	213,522				
	Occupancy	65%				
	ALOS	2.13				
	RevPAR	79				
	Top 5 Nationalities	**1**) India	**2**) Oman	**3**) Pakistan	**4**) UAE	**5**) KSA
★ **1-Star** Number of Hotels: 9	Available Rooms	108,251				
	Occupancy	52%				
	ALOS	2.00				
	RevPAR	82				
	Top 5 Nationalities	**1**) India	**2**) Pakistan	**3**)Bangladesh	**4**) Oman	**5**) Philippines
Deluxe Number of Hotels: 6	Available Rooms	265,065				
	Occupancy	70%				
	ALOS	2.39				
	RevPAR	145				
	Top 5 Nationalities	**1**) UAE	**2**) India	**3**) Oman	**4**) KSA	**5**) Iraq
Standard Number of Hotels: 8	Available Rooms	208,134				
	Occupancy	58%				
	ALOS	1.93				
	RevPAR	115				
	Top 5 Nationalities	**1**) India	**2**) Oman	**3**) Iraq	**4**) KSA	**5**) Pakistan
Basic Number of Hotels: 23	Available Rooms	265,217				
	Occupancy	65%				
	ALOS	2.39				
	RevPAR	86				
	Top 5 Nationalities	**1**) India	**2**) Oman	**3**) Pakistan	**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.

$$ADR = Room\ Revenue\ /\ Rooms\ Sold$$

❖ **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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