

SHARJAH HOSPITALITY STATISTICS REPORT

Q1 – 2024

Strategy – Research & Statistics Division
May, 2024



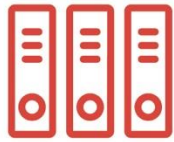


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EXECUTIVE SUMMARY



1st Quarter - 2024

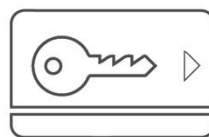
Sharjah Hotel Main Indicators

Table 1: Sharjah Tourism Main Indicators – Q1 2024 vs. Q1 2023

KEY PERFORMANCE INDICATORS	Guest	Occupancy Rate%	ALOS (days)
	428,942 ▼ 8%	73% ▶ 0%	1.90 ▼ 4%
Total Revenue AED 172 Million ▼ 9%	RevPAR AED 187 ▲ 6%	ADR AED 267 ▲ 6%	



**101
HOTEL**



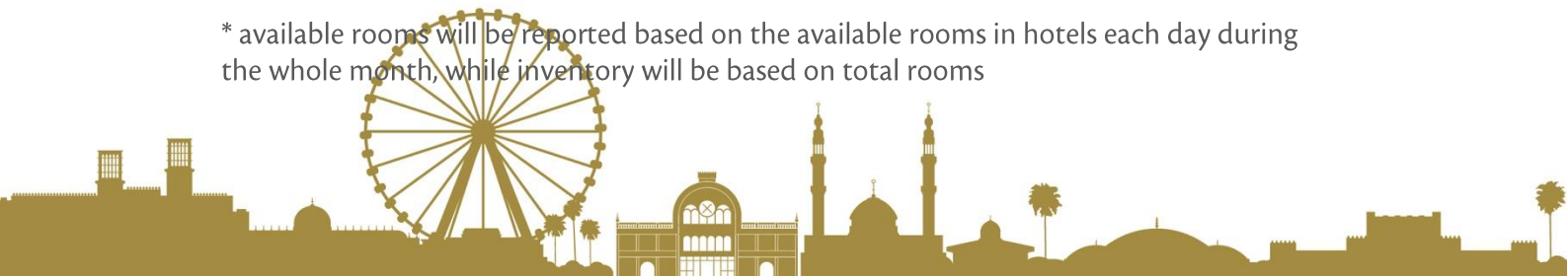
**673,261
*ROOMS Available**

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	36
	95,319	209,013	206,325	162,604

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 (2023 – 2024)

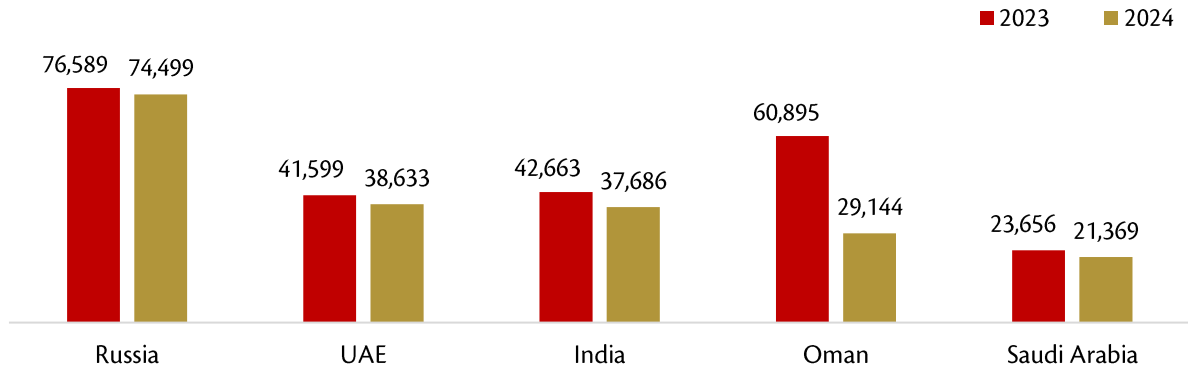


Figure 2: Hotel guests in Sharjah during first quarter 2023-2024

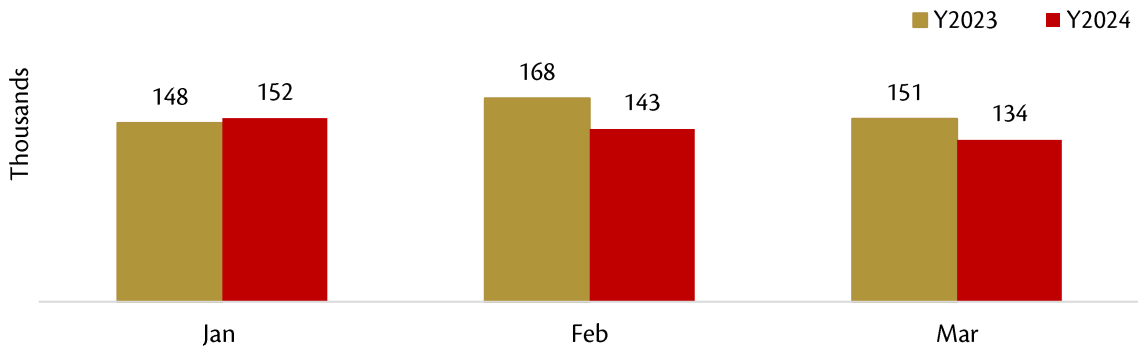
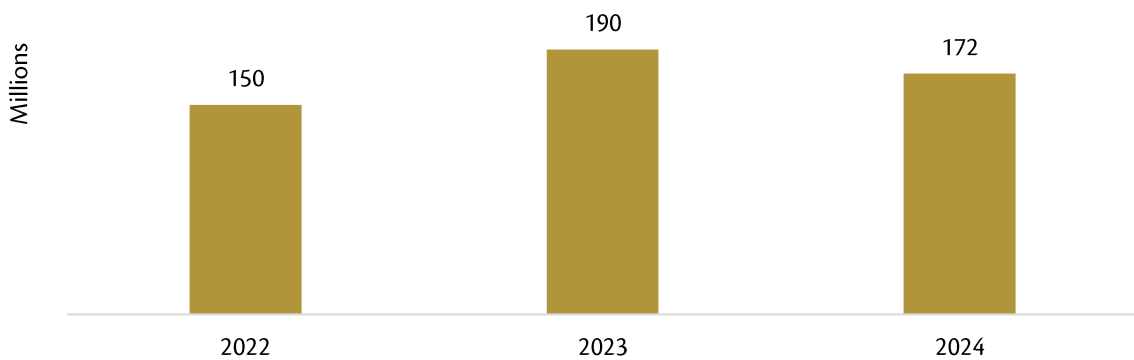


Figure 3: Hotel Establishments total revenue – Q1

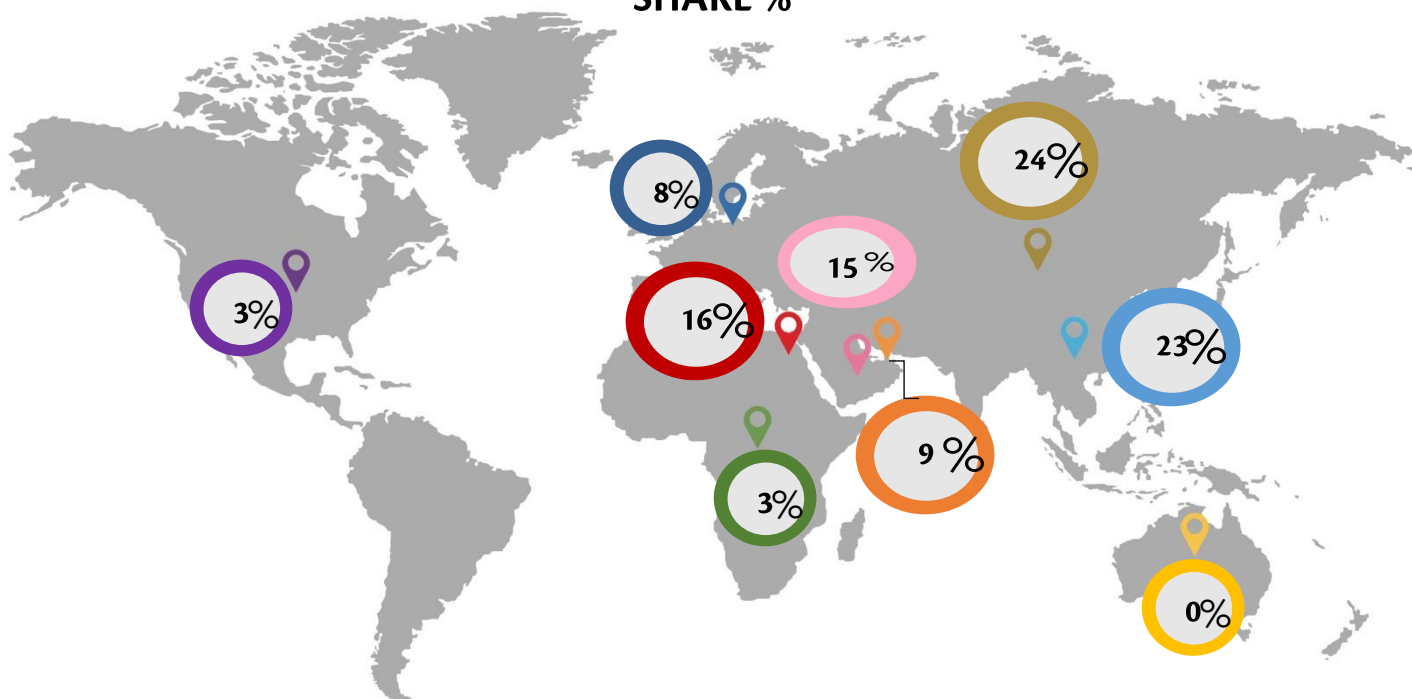




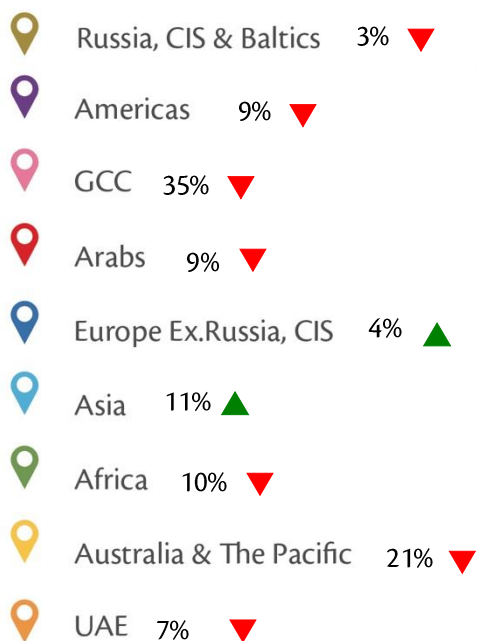
KEY INDICATORS BY REGION

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

SHARE %



GROWTH %



TOP 20 SOURCE MARKETS

Figure 5: Market Share % for the Top 20 Source Markets during Q1 - 2024.

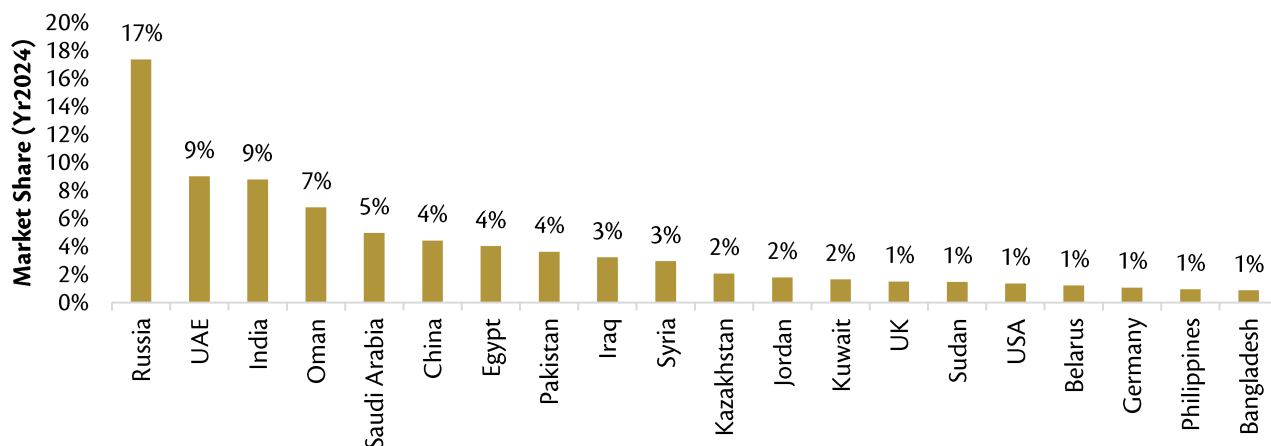
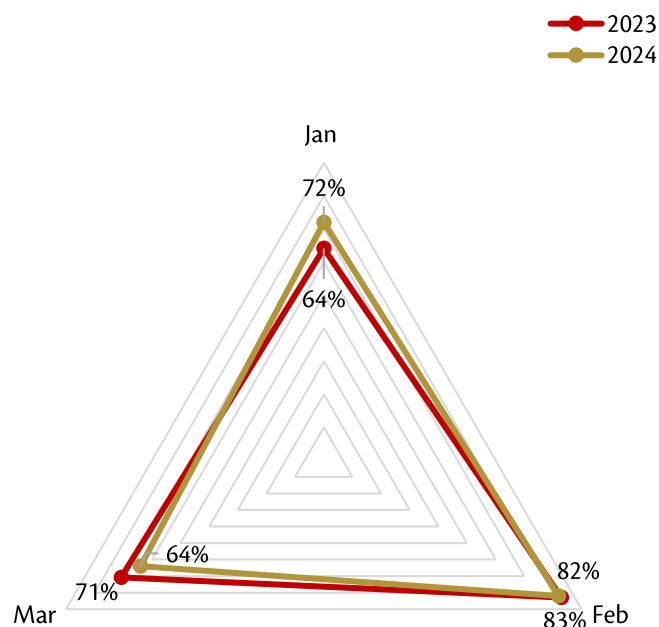


Table 3: Top 20 source markets

Rank	Market	ALOS Nights	Nights Number	Change %
1	Russia	2.40	178,477	-3%
2	UAE	1.35	52,135	-7%
3	India	2.00	75,341	-12%
4	Oman	1.38	40,152	-52%
5	Saudi Arabia	1.59	33,930	-10%
6	China	1.88	35,732	600%
7	Egypt	1.96	33,882	0%
8	Pakistan	1.66	25,739	1%
9	Iraq	2.98	41,404	-5%
10	Syria	1.91	24,221	-11%
11	Kazakhstan	2.04	18,082	-15%
12	Jordan	1.78	13,675	-25%
13	Kuwait	1.56	11,143	24%
14	UK	1.81	11,616	-5%
15	Sudan	2.43	15,412	41%
16	USA	1.94	11,343	-18%
17	Belarus	2.32	12,230	3%
18	Germany	1.81	8,211	5%
19	Philippines	2.08	8,569	-21%
20	Bangladesh	1.60	6,044	-18%

Figure 6: Average Occupancy Rate - Q1



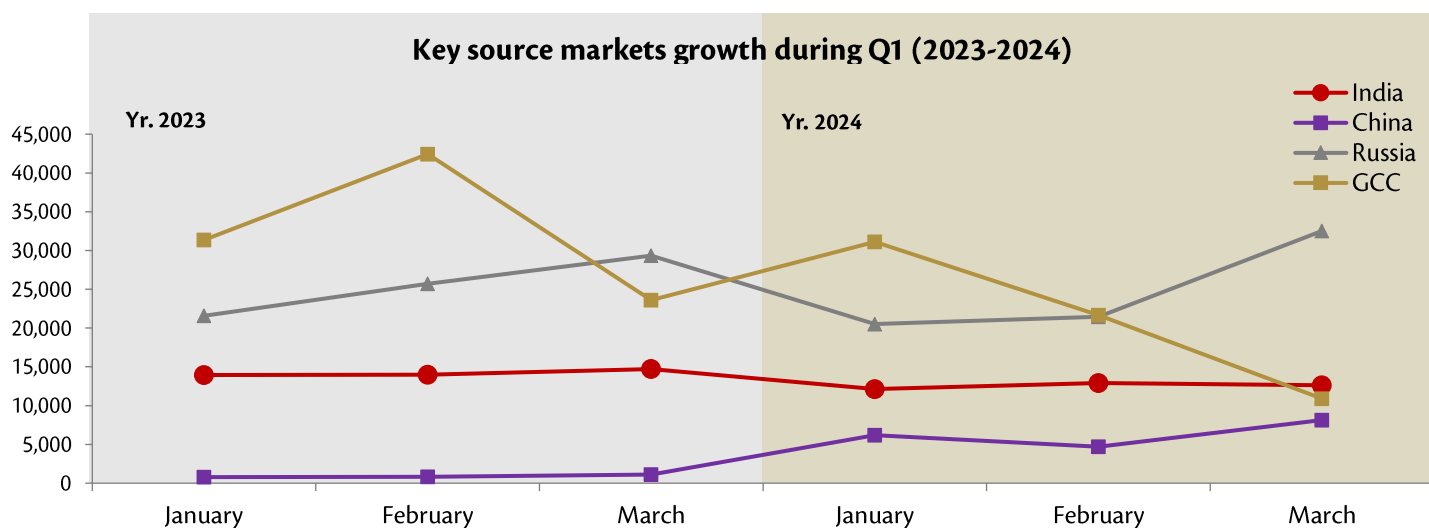
*note: rank & change% based on guest numbers compared to 2023

KEY SOURCE MARKETS PERFORMANCE

Table 4: Key source markets performance

India	Guest		Growth%	2024 %Share	Guest Night		Growth%
	Month	Yr2023			Yr2024	Yr2023	
January	13,950	12,137	▼ -13%	8%	25,241	22,776	▼ -10%
February	13,999	12,910	▼ -8%	9%	26,471	25,433	▼ -4%
March	14,714	12,639	▼ -14%	9%	32,600	27,132	▼ -17%
Q1	42,663	37,686	▼ -12%	9%	84,312	75,341	▼ -11%
China	Guest		Growth%	2024 %Share	Guest Night		Growth%
	Month	Yr2023			Yr2024	Yr2023	
January	783	6,180	▲ 689%	4.1%	2,226	12,434	▲ 459%
February	813	4,699	▲ 478%	3.3%	1,748	10,466	▲ 499%
March	1,121	8,136	▲ 626%	6.1%	2,086	12,832	▲ 515%
Q1	2,717	19,015	▲ 600%	4%	6,060	35,732	▲ 490%
Russia	Guest		Growth%	2024 %Share	Guest Night		Growth%
	Month	Yr2023			Yr2024	Yr2023	
January	21,567	20,519	▼ -5%	14%	54,415	46,339	▼ -15%
February	25,687	21,462	▼ -16%	15%	69,210	60,202	▼ -13%
March	29,335	32,518	▲ 11%	24%	77,348	71,936	▼ -7%
Q1	76,589	74,499	▼ -3%	17%	200,973	178,477	▼ -11%
GCC	Guest		Growth%	2024 %Share	Guest Night		Growth%
	Month	Yr2023			Yr2024	Yr2023	
January	31,375	31,101	▼ -1%	20%	45,407	47,547	▲ 5%
February	42,430	21,669	▼ -49%	15%	54,720	32,290	▼ -41%
March	23,601	10,907	▼ -54%	8%	37,650	15,712	▼ -58%
Q1	97,406	63,677	▼ -35%	15%	137,777	95,549	▼ -31%

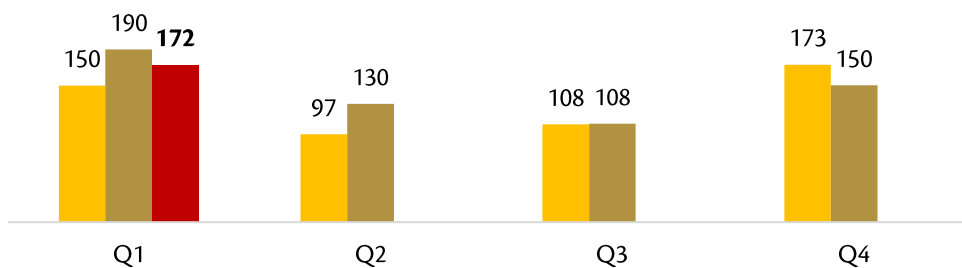
*All GCC countries excluding UAE



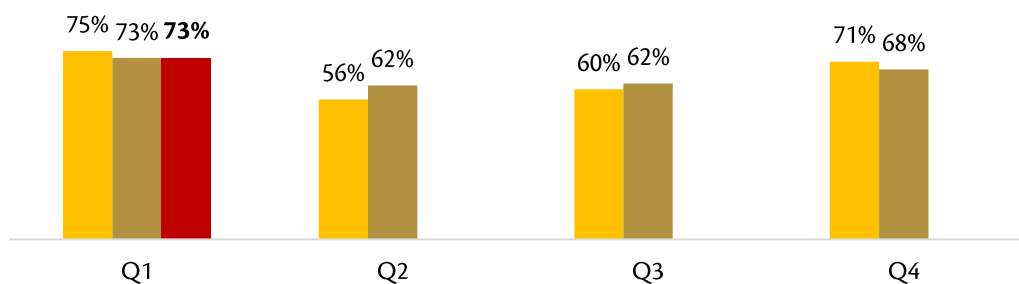
SECTOR PERFORMANCE – KEY INDICATORS (QUARTERLY)

■ 2022 ■ 2023 ■ 2024

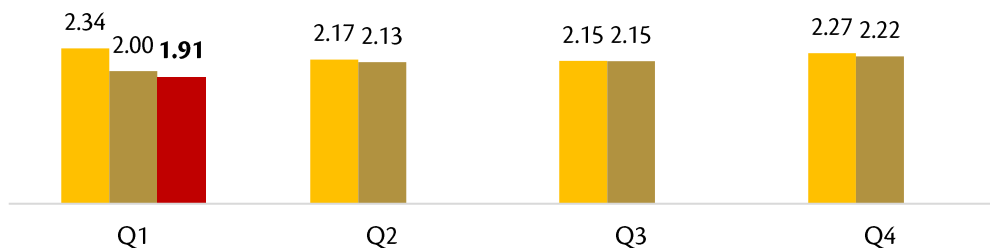
Revenue
(AED Million)



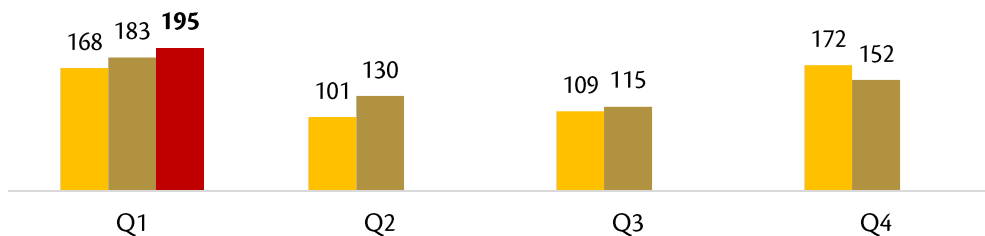
Occupancy %



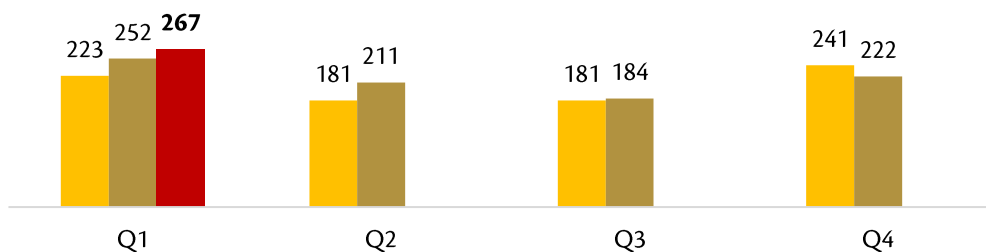
ALOS
(DAYS)



REVPAR
(AED)



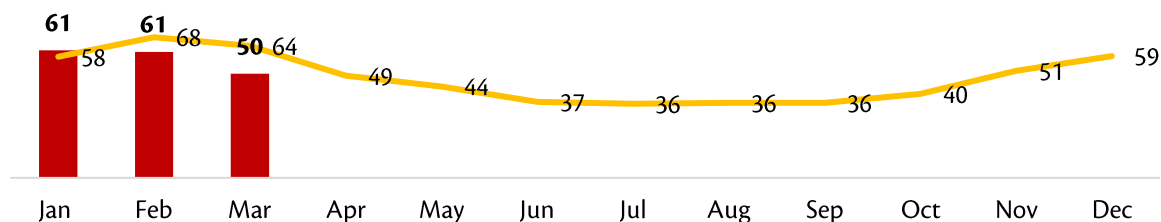
ADR
(AED)



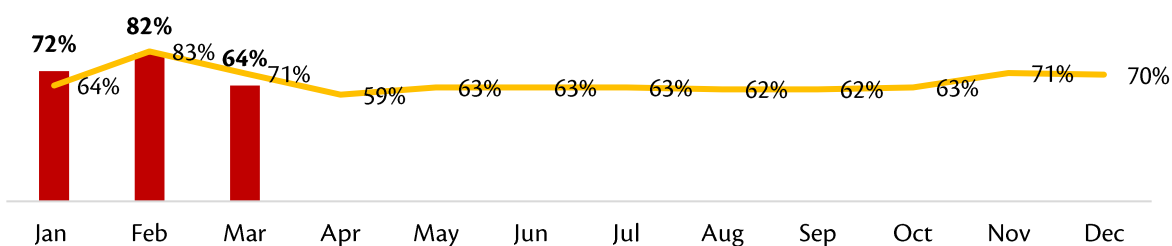
SECTOR PERFORMANCE – KEY INDICATORS (MONTHLY)

■ 2024 — 2023

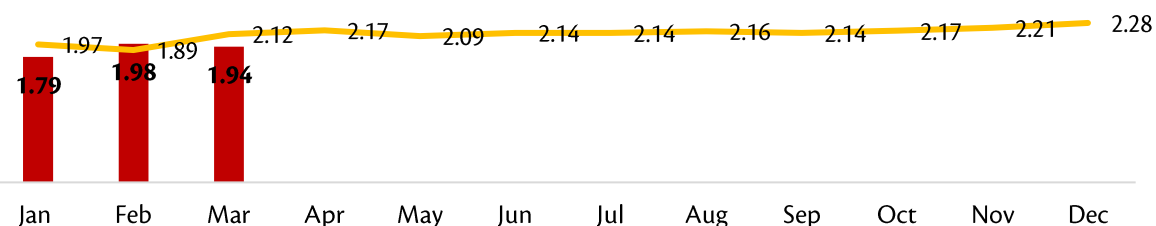
Revenue
(AED Million)



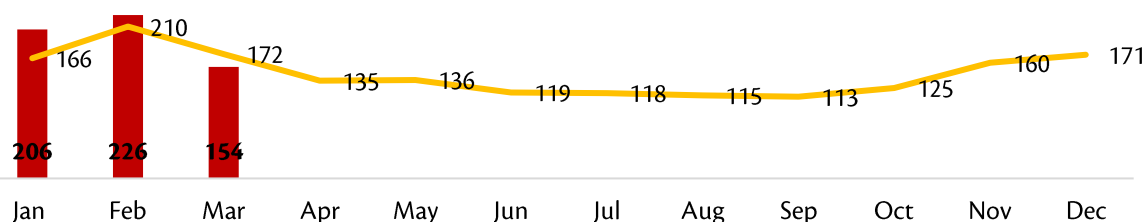
Occupancy %



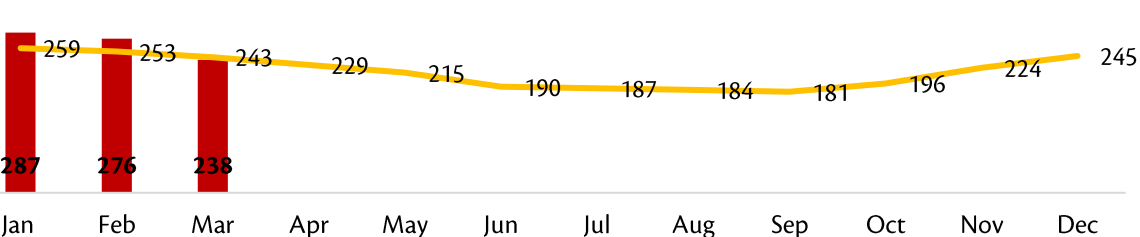
ALOS
(DAYS)



REVPAR
(AED)



ADR
(AED)





KEY INDICATORS PER HOTEL TYPE



Table 5: Hotels performance by classification

★★★★★ 5-Star	Available Rooms	95,319				
	Occupancy	69%				
Number of Hotels: 13	ALOS	1.58				
	RevPAR	338				
	Top 5 Nationalities	1) Russia	2) UAE	3) KSA	4) Oman	5) China
★★★★★	Available Rooms	209,013				
4-Star	Occupancy	74%				
Number of Hotels: 21	ALOS	1.77				
	RevPAR	196				
	Top 5 Nationalities	1) Russia	2) UAE	3) China	4) Oman	5) India
★★★	Available Rooms	146,754				
3-Star	Occupancy	78%				
Number of Hotels: 14	ALOS	1.69				
	RevPAR	176				
	Top 5 Nationalities	1) Russia	2) India	3) UAE	4) Oman	5) KSA
★★	Available Rooms	36,228				
2-Star	Occupancy	71%				
Number of Hotels: 11	ALOS	1.99				
	RevPAR	131				
	Top 5 Nationalities	1) Oman	2) India	3) Pakistan	4) Egypt	5) KSA
★	Available Rooms	23,343				
1-Star	Occupancy	70%				
Number of Hotels: 10	ALOS	2.37				
	RevPAR	73				
	Top 5 Nationalities	1) India	2) Egypt	3) Pakistan	4) Bangladesh	5) Oman
	Available Rooms	69,457				
Deluxe	Occupancy	72%				
Number of Hotels: 7	ALOS	2.62				
	RevPAR	153				
	Top 5 Nationalities	1) Oman	2) China	3) Iraq	4) UAE	5) India
	Available Rooms	35,629				
Standard	Occupancy	60%				
Number of Hotels: 8	ALOS	1.93				
	RevPAR	127				
	Top 5 Nationalities	1) India	2) Iraq	3) Sudan	4) Pakistan	5) Oman
	Available Rooms	57,518				
Basic	Occupancy	75%				
Number of Hotels: 26	ALOS	2.56				
	RevPAR	116				
	Top 5 Nationalities	1) India	2) Oman	3) Egypt	4) Pakistan	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.

$$\text{RevPAR} = \text{Occupancy} \times \text{ADR}$$

Prepared by:

Niama Al Ali – Research & Statistics Division

Reviewed by:

Murtada Al Zaylaie – Excellence Advisor & Strategy Department Acting Manager

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