Tourism Performance Report
Q3 2019

QATAR

Visitor Arrivals

Qatar welcomed 1.49 million visitors[1] in the first three quarters of 2019, representing an increase of 12% compared to the same period in 2018. Visitation from nationals of all regions of the world grew significantly, with the exception of Other African nationals (who represent only a small proportion of total visitors).

In Q3 2019 (YTD) and for the first time, USA nationals replaced UK nationals as Qatar's second largest source of visitor arrivals, after Indian nationals. Nonetheless, both showed marked growth in comparison to the same time period last year. Arrivals from UK nationals (90,862 YTD) are up 20% from 2018, and nearly back to 2017 levels. And arrivals from USA nationals (91,597 YTD) are up 16% from 2018, a significant jump in the annual growth rates achieved over the past three years (between 4-6%). This growth has helped offset the 8% decline in visitation from Indian nationals between 2018 and 2019 YTD, which represents a slowing of the unprecedented growth from Indian national visitors in 2018 (25% between 2017 and 2018 YTD).

+ 12%

1,492,653
Visitor arrivals

Hospitality Accommodation

The hospitality accommodation sector in Qatar saw room supply increase by 4% YTD Q3 2019, compared to the same period in 2018. Substantial growth was seen in demand (up 21%), resulting in an increase in occupancy (up 8%), over the first three quarters of 2019 in comparison to the same period in 2018.

Overall, Average Room Rate (ARR) was down by 4% across all hotels and hotel apartments. However, Revenue Per Available Room (RevPAR) was up 3% at the end of Q3 2019, in comparison to YTD Q3 2018.

The average length of stay (ALOS) for visitors in Qatar during the first 3 quarters of 2019 was 3.47 nights per trip in the hotel segment (with the highest in 4-Star hotels at 4.99 nights per trip on average) and 6.72 nights per trip in the hotel apartment segment (the highest was in Standard Apartments at 7.16 nights per trip on


[1]A visitor is a traveler taking a trip to a main destination outside of his/her usual environment, for less than a year, for any main purpose (business, leisure or other personal purpose) other than to be employed by a resident entity in the country or place visited. A visitor (domestic, inbound or outbound) is classified as a tourist (or overnight visitor), if his/her trip includes an overnight stay, or as a same-day visitor (or excursionist) otherwise. Source: United Nations World Tourism Organization (UNWTO)

average). ALOS across all hotels and hotel apartments decreased by 3% YTD Q3 in comparison to the same period last year. This decrease has been driven by a significant decline in ALOS across the hotel apartment segment (-45%). In the hotel segment, ALOS has increased slightly (by 1%).

Next quarter marks the beginning of the fourth cruise season in Qatar, set to start on the 22nd of October. This will be the first season to welcome turnaround cruise passengers, whose cruise itineraries will begin and end in Qatar, allowing them a longer visit to the country. Out of the thirty ships set to arrive in Q4 2019, two will dock overnight while five will begin and end their journeys in Doha, supporting its emergence as a turnaround port and allowing cruise visitors to explore more of Qatar.

Q4 will also witness several business events such as Hospitality Qatar, Cityscape and INDEX Qatar which are expected to host participants and visitors from the various fields. November and December will see the GCC Cup and FIFA Club World Cup, both expected to attract football fans from the region.

Occupancy
+ 8%

ARR
- 4%

RevPAR
+ 3%

ALOS
- 3%
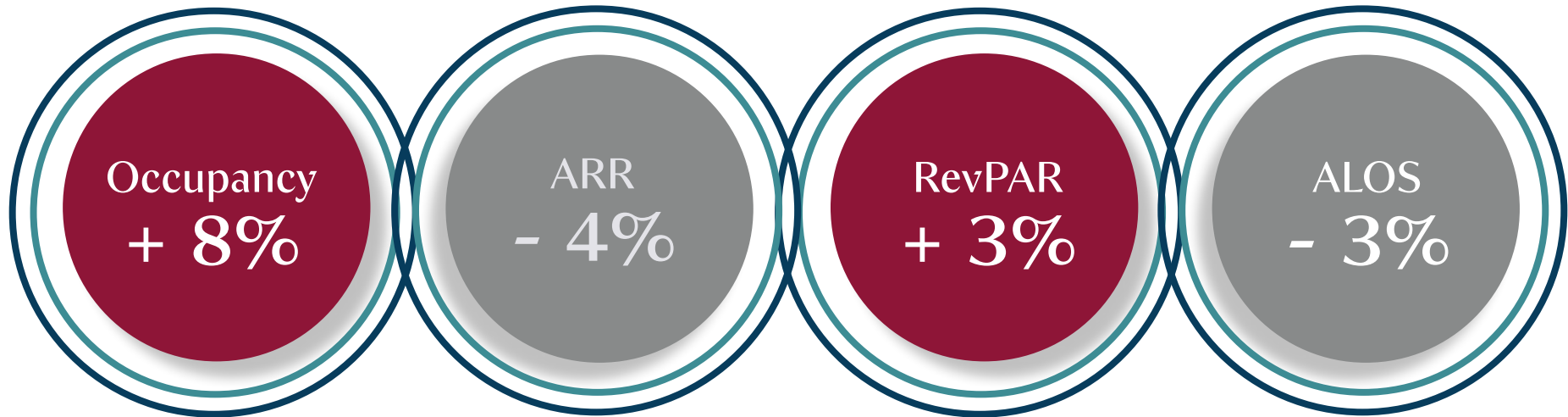
Highlights above represent growth between the first three quarters of 2018 and the first three quarters of 2019 for the entire hospitality accommodation sector (hotels and hotel apartments)
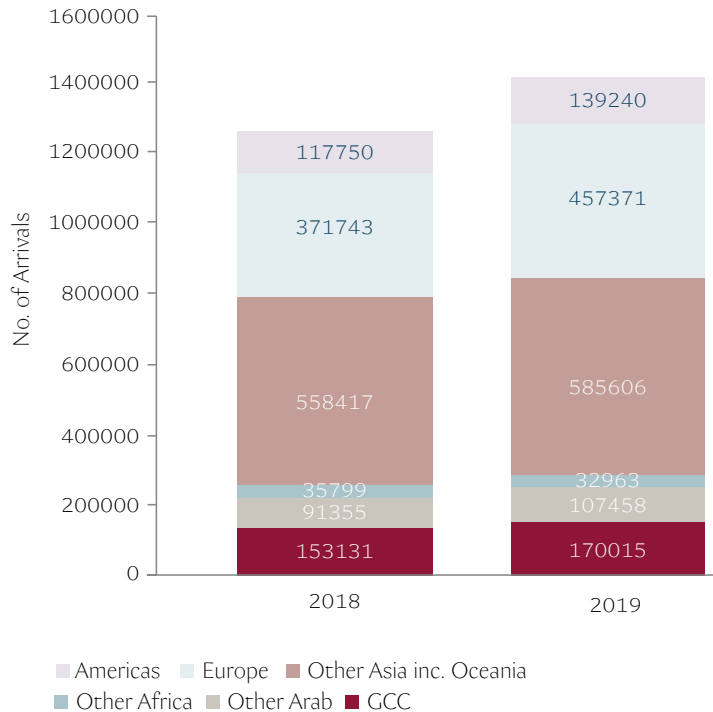
Visitor Arrivals

by Nationality, Grouped by Region

A total of 1,492,653 visitors arrived in Qatar over the first three quarters of 2019, an increase of 12% compared to the same period in 2018. This increase was driven by the continued, consistent growth achieved since the start of 2019 from visitors across all regions, except from nationals of Other Africa, where arrivals have dropped by 8% (but only representing a small number in level terms—a decline of only 2,836 visitors in total). Visitor arrivals from all other regions showed significant growth; European visitors were up 23%, Other Arab nationals and nationals from the Americas were both up 18%, GCC nationals were up 11%, and nationals from Other Asia, including Oceania were up 5%.

Visitor Arrivals to Qatar by Nationality, Grouped by Region, Jan-Sep 2019 vs Jan-Sep 2018

|	2018	2019
Americas	117750	139240
Europe	371743	457371
Other Asia inc. Oceania	558417	585606
Other Africa	35799	32963
Other Arab	91355	107458
GCC	153131	170015

Arrivals to Qatar by Month (January to September 2015-2019)

The number of visitor arrivals to Qatar for every month in the first three quarters of 2019 has outpaced the number of visitor arrivals in the same month of 2018. Increases have ranged from a low of 1% and 4% in May and January respectively, to 23% and 24% in April and September respectively. Similar to visitor arrival patterns seen in the past, monthly visitor arrivals to Qatar in 2019 were high in January, dipped in February, and rebounded to reach their highest in March. Visitors arrivals dipped again in the following months—most significantly between April and May, when the Holy Month of Ramadan began. Arrival numbers increased again in July and held relatively steady for the remainder of the quarter.

Monthly Arrivals to Qatar Through Q3, 2015-19
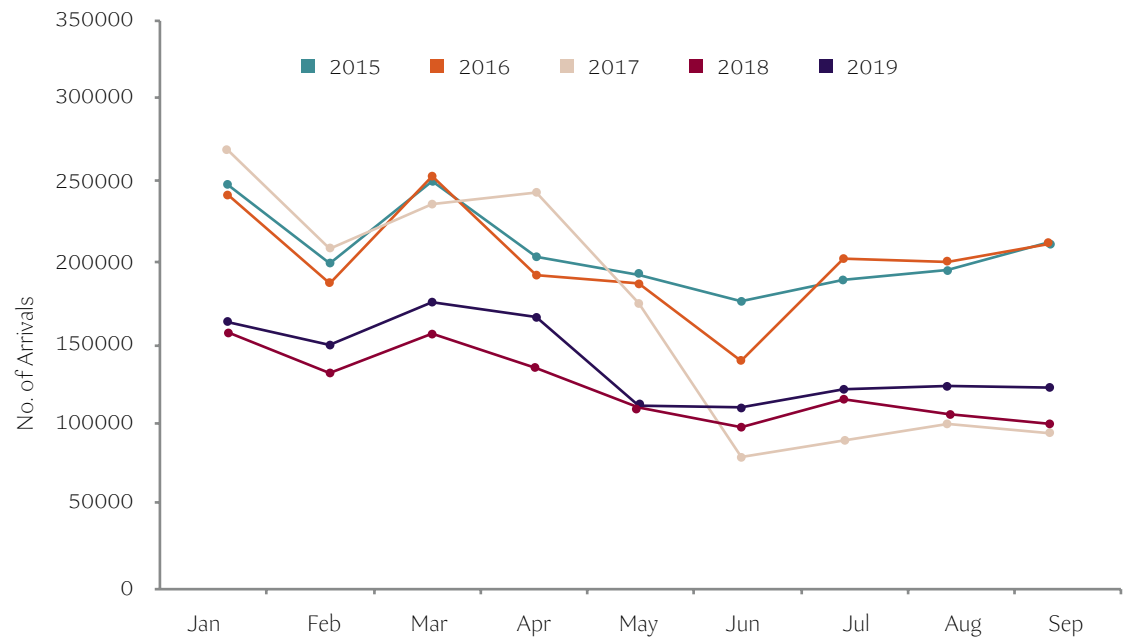
Visitor arrivals Q3 YTD

+ 12%

Highest monthly arrivals in March 2019

211,966

(+ 13%)

Hospitality Accommodation

Hotel and Hotel Apartment Performance

Since the start of 2019, seven new properties have opened their doors, adding 1,436 new hotel rooms to the market. However, two 5-star properties (Four Seasons Doha and Doha Marriott) temporarily closed for renovations during Q3. As such, Qatar currently has a total of 26,778 rooms across 128 properties available in the market, representing a 4% increase in room supply compared to the close of Q3 2018.

The Occupancy Rate (OCC) across all hotels and hotel apartments was 64% in the first nine months of 2019, representing an 8% increase over the same period in 2018. Except for deluxe hotel apartments (-4%), occupancy rates increased across all other property classifications in comparison to the same period in 2018. The greatest increases in occupancy were seen in 1&2-star hotels (+25%), followed by 3-star hotels (+13%), and then 4-star hotels and standard hotel apartments (both +11%).
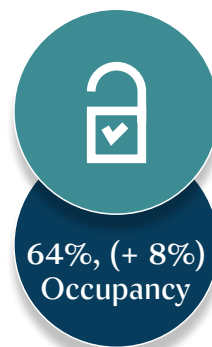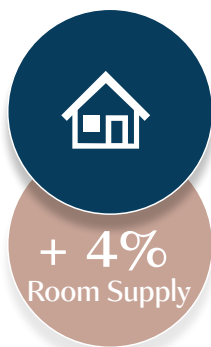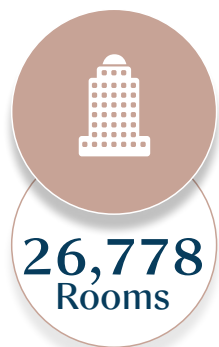
The Average Room Rate (ARR) across all hotels and hotel apartments during the first three quarters of 2019 decreased 4% (to 369 QAR) compared to the same period in 2018. ARR was down across all property classifications, with the exception of 1&2-star hotels. Despite this continued drop in ARR, a significant increase in demand (up 21%) allowed for a positive increase in Revenue Per Available Room (RevPAR). RevPAR increased by 3% (to 237 QAR) overall in the first three quarters of 2019, compared to the same period in 2018. All hotel classes saw increases in RevPAR, while hotel apartments saw slight decreases. The most significant increases in RevPAR were found in 1&2-star hotels (+27%), as well as 3-star hotels (+11%).

There was a slight drop of 3% in the average length of stay (ALOS) across all hotels and hotel apartments in the first nine months of 2019 (3.7 nights per trip) compared to the same period last year (3.8 nights per trip). While ALOS has increased by 4% in 5-star hotels (which account for 47% of Qatar's total room supply), 25% in 3-star hotels, and 6% in standard hotel apartments; it has dropped in deluxe hotel apartments (-55%), 1&2-star hotels (-31%), as well as in 4-star hotels (-13%).
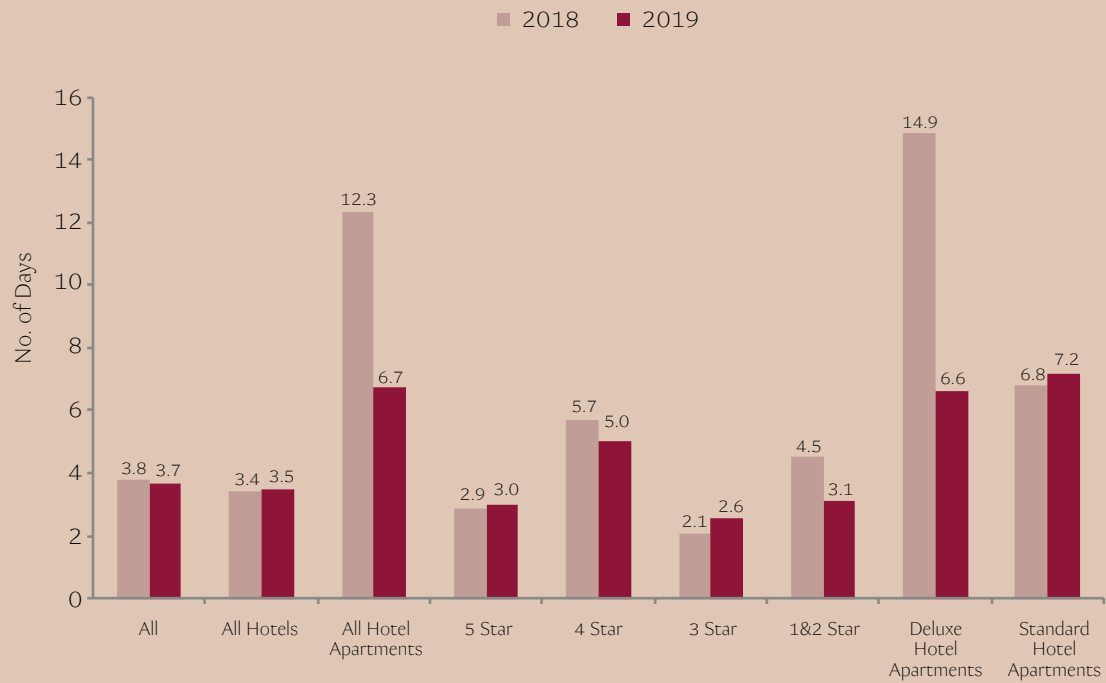
Accommodation Sector Summary Perfomance Indicators, YTD Jan-Sep 2019 vs Jan-Sep 2018

	2018 YTD				2019 YTD				% Change 2018-19			
	Occ	ARR	RevPAR	ALOS	Occ	ARR	RevPAR	ALOS	Occ	ARR	RevPAR	ALOS
All	59%	386	229	3.8	64%	369	237	3.7	8%	-4%	3%	-3%
All Hotels	58%	394	228	3.4	63%	375	238	3.5	9%	-5%	4%	1%
All Hotel Apartments	72%	331	237	12.3	71%	323	228	6.7	-1%	-2%	-4%	-45%
5 Star	55%	576	318	2.9	60%	538	320	3.0	8%	-7%	1%	4%
4 Star	59%	242	143	5.7	66%	227	149	5.0	11%	-6%	4%	-13%
3 Star	67%	178	120	2.1	76%	175	132	2.6	13%	-2%	11%	25%
1 & 2 Star	61%	143	87	4.5	76%	146	110	3.1	25%	2%	27%	-31%
Deluxe Hotel Apartments	73%	354	257	14.9	70%	351	246	6.6	-4%	-1%	-5%	-55%
Standard Hotel Apartments	67%	220	148	6.8	74%	197	146	7.2	11%	-11%	-1%	6%

26,778 Rooms

+ 4% Room Supply

+ 21% Demand

64%, (+ 8%) Occupancy

369 QAR, (- 4%) ARR

237 QAR, (+ 3%) RevPAR

Average Length of Stay by Hotel Classification, Jan-Sep 2019 vs Jan-Sep 2018

Legend: ■ 2018 ■ 2019

No. of Days (y-axis: 0 to 16)

Category	2018	2019
All	3.8	3.7
All Hotels	3.4	3.5
All Hotel Apartments	12.3	6.7
5 Star	2.9	3.0
4 Star	5.7	5.0
3 Star	2.1	2.6
1&2 Star	4.5	3.1
Deluxe Hotel Apartments	14.9	6.6
Standard Hotel Apartments	6.8	7.2

**All ALOS
3.7
nights per trip
(- 3%)**

**Hotels ALOS
3.5 nights per trip
(+ 1%)**

**Hotel Apartments
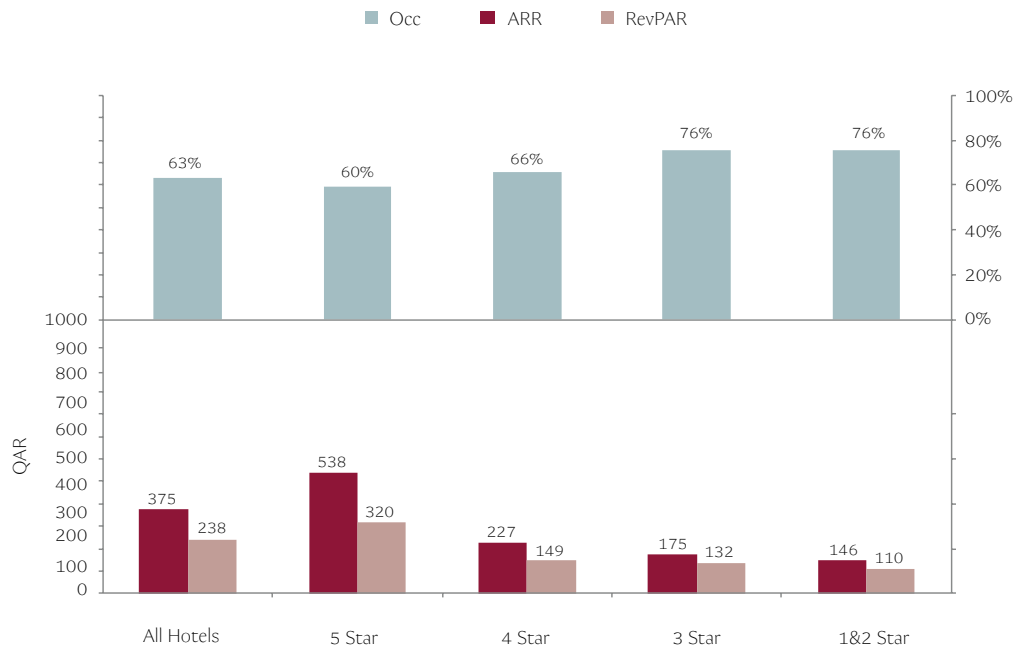ALOS 6.7
nights per trip
(- 45%)**

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Hotel Performance

The occupancy rate across all hotels in the first three quarters of 2019 was 63%, up 9% compared to the same period in 2018. Occupancy rates increased in all classes of hotels during this period in 2019, as compared to 2018. The highest occupancy rate YTD (76%) was achieved in the 3-star and 1&2-star classifications, while the lowest (60%) was seen in the 5-Star classification.
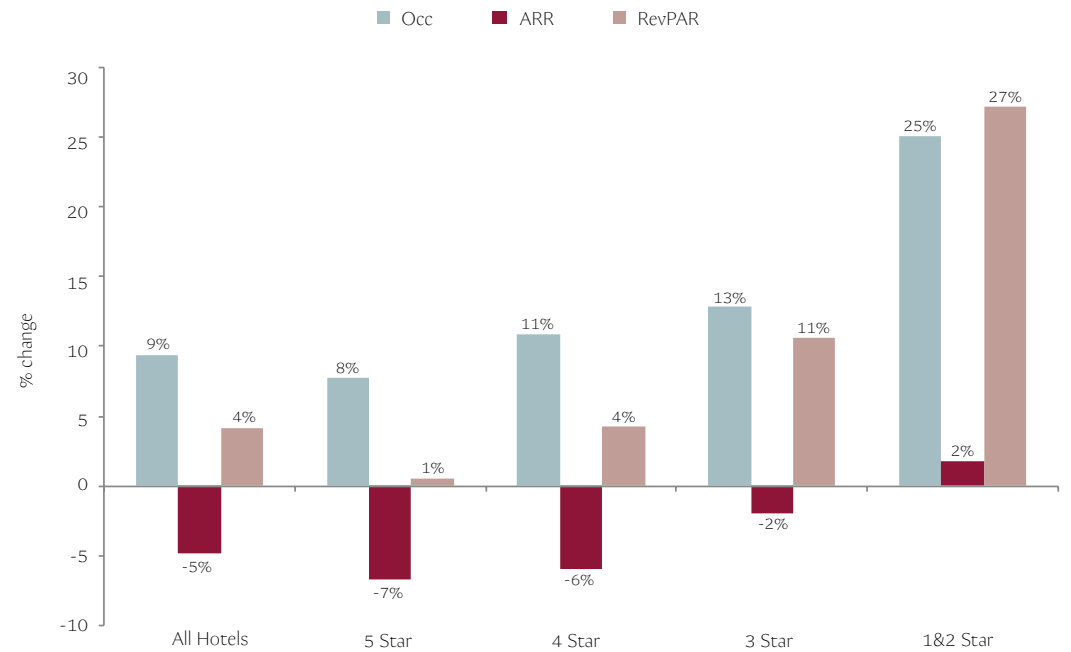
The average ARR and RevPAR across all hotels in the first three quarters of 2019 were 375 QAR (down 5% compared to the same period in 2018) and 238 QAR (up 4% compared to 2018) respectively. The highest ARR continues to be achieved in the 5-star classification, at 538 QAR, but this has declined -7% from the same time period in 2018. ARR declined across all classes of hotels, except 1&2-star hotels, in the first nine months of 2019; while RevPAR has increased across all hotel star classes.

**Hotel Occupancy
63%
(+ 9%)**

**Hotel ARR
375 QAR
(- 5%)**

**Hotel RevPAR
238 QAR
(+ 4%)**

Occupancy Rate, ARR, and RevPAR by Hotel Classification, Jan-Sep 2019

Legend: Occ | ARR | RevPAR

	All Hotels	5 Star	4 Star	3 Star	1&2 Star
Occ	63%	60%	66%	76%	76%
ARR	375	538	227	175	146
RevPAR	238	320	149	132	110

QAR axis: 0, 100, 200, 300, 400, 500, 600, 700, 800, 900, 1000

Occupancy Rate, ARR, and RevPAR, % change Jan-Sep 2019 vs Jan-Sep 2018 by Hotel Classification

Legend: Occ | ARR | RevPAR

	All Hotels	5 Star	4 Star	3 Star	1&2 Star
Occ	9%	8%	11%	13%	25%
ARR	-5%	-7%	-6%	-2%	2%
RevPAR	4%	1%	4%	11%	27%

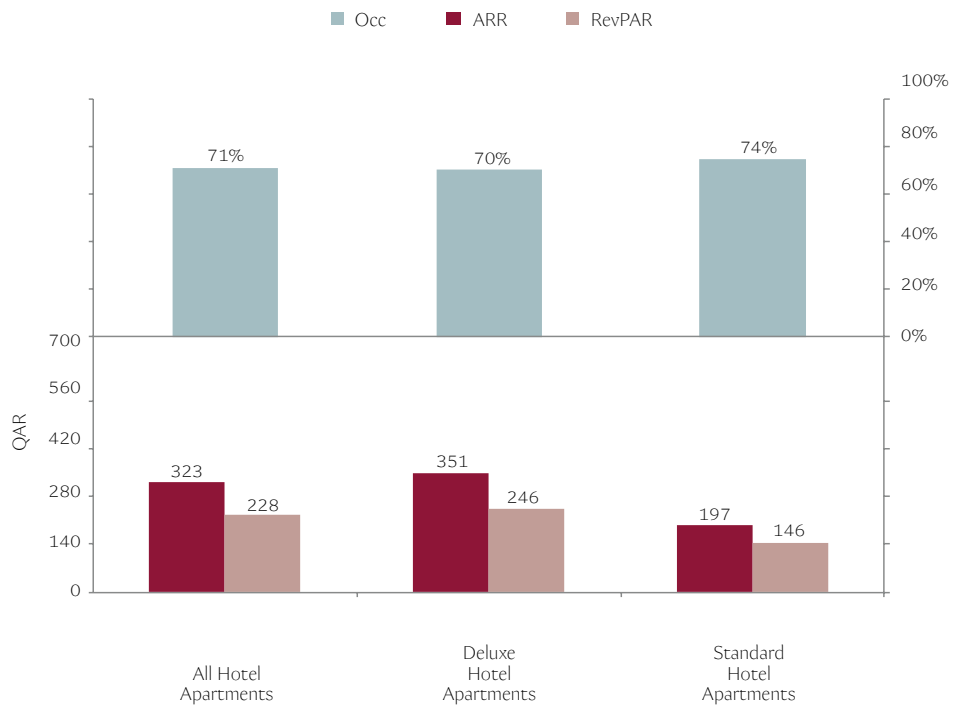% change

Hotel Apartment Performance

The occupancy rate across all hotel apartments in the first three quarters of 2019 was 71%, down 1% as compared to the same period in 2018. A slightly higher occupancy rate (74%) was achieved in the standard hotel apartments classification, in comparison to the deluxe hotel apartments classification (70%). This occupancy rate of 74% for standard hotel apartments represents an 11% increase over the same time period in 2018, while the occupancy rate for deluxe hotel apartments declined by 4%.

The ARR and RevPAR across all hotel apartments in the first nine months of 2019 were 323 QAR (down 2% compared to 2018) and 228 QAR (down 4% compared to 2018) respectively. The highest ARR continues to be achieved in the deluxe apartment classification at 351 QAR, down -1% from 2018.
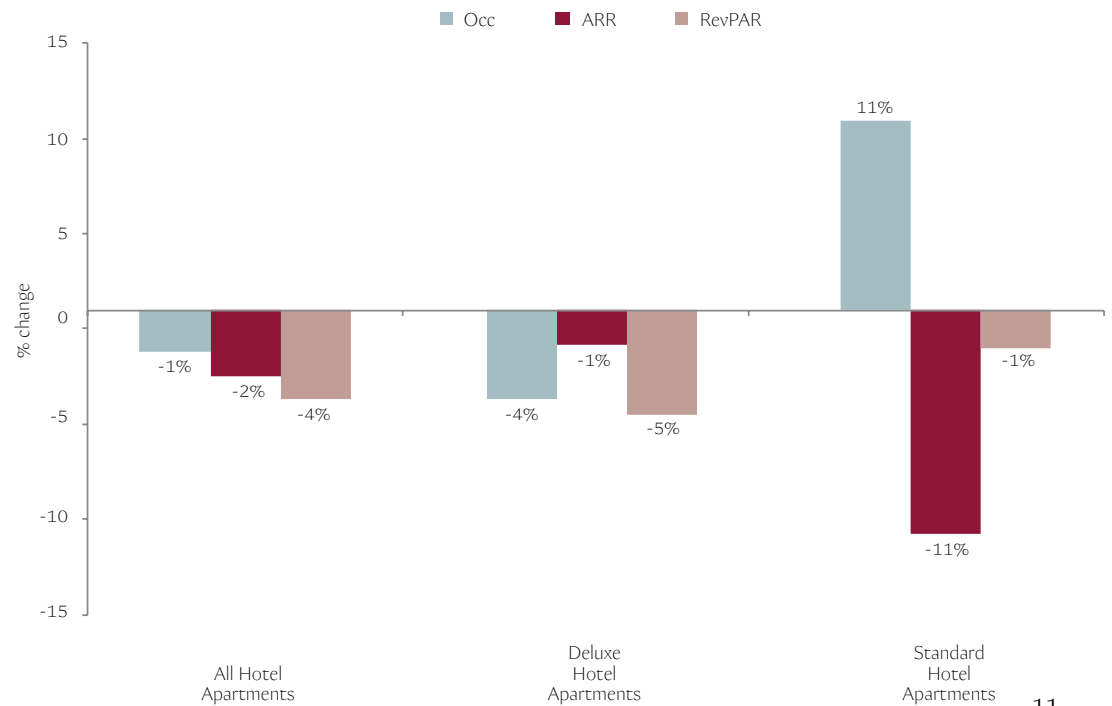
Hotel Apartments Occupancy
71%
(- 1%)

Hotel Apartments ARR
323 QAR
(- 2%)

Hotel Apartments RevPAR
228 QAR
(- 4%)

Occupancy Rate, ARR, and RevPAR by Hotel Apartment Classification, Jan-Sep 2019

Occupancy Rate, ARR, and RevPAR, % change Jan-Sep 2019 vs Jan-Sep 2018 by Hotel Apartment Classification

Occ ARR RevPAR

	All Hotel Apartments	Deluxe Hotel Apartments	Standard Hotel Apartments
Occ	71%	70%	74%
ARR	323	351	197
RevPAR	228	246	146

Occ ARR RevPAR

	All Hotel Apartments	Deluxe Hotel Apartments	Standard Hotel Apartments
Occ	-1%	-4%	11%
ARR	-2%	-1%	-11%
RevPAR	-4%	-5%	-1%

For further information, please contact
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