Tourism Performance Report
H1 2019

QATAR

المجلس الوطني للسياحة

National Tourism Council

Visitor Arrivals

Qatar welcomed 1.05 million visitors[1] in the first half of 2019, representing an 11% increase compared to the same period in 2018. Significant growth was seen across visitor numbers from all regions in H1 2019, except for Other African nationals (non Arabic) which were down 10% from H1 2018, yet representing only a small number of arrivals.

Even though Indian nationals remain Qatar's largest source of visitor arrivals, Indian visitor arrivals were down 9% in the first six months of 2019 compared to the same period in 2018. However, visitor arrivals from UK and USA nationals, Qatar's second and third largest sources of visitor arrivals were up 17% and 11% respectively in H1 2019 compared to H1 2018.

Doha Port hosted 28 cruise ships in H1 2019, carrying 70,240 passengers (up 111% from H1 2018). Cruise ships have provided a boost in visitor arrivals to Qatar and have significantly contributed to growth, specifically among nationals from the Americas and Europe. The most notable increases came from nationals of Germany (up 75%, +23,364), Italy (up 42%, +7,213) and Brazil (up 67%, +2,454).

+11%

1,053,015
Visitor arrivals

28 cruise ships

hosted by Doha Port

+111%

70,240
Cruise visitors

*Highlights above represent H1 2019 data, with growth from H1 2018

[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)

Hospitality Accommodation

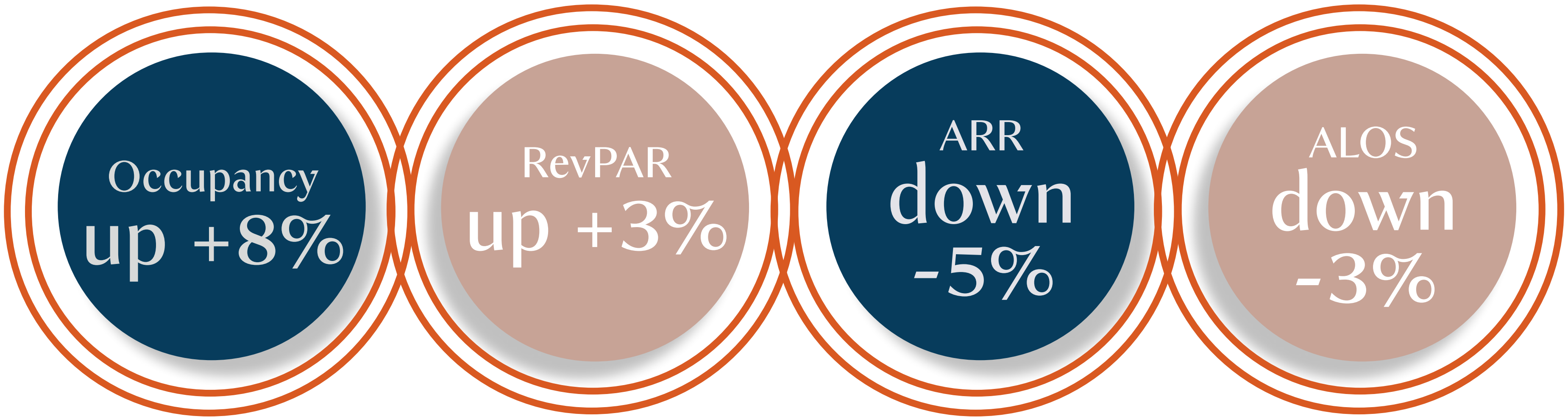
The hospitality accommodation sector in Qatar saw a room supply increase of 8% in H1 2019, compared to the same period in 2018. Furthermore, substantial growth was seen in demand (up 19%), resulting in a considerable increase in occupancy (up 8%), over the first half of 2019 in comparison to the same period in 2018.

Overall, Average Room Rate (ARR) was down by 5% across all hotels and hotel apartments. However, Revenue Per Available Room (RevPAR) was up 3% in H1 2019, in comparison to H1 2018.

The average length of stay for visitors in Qatar during the first six months of 2019 was 3.54 nights per trip in the hotel segment (the highest was in four-star hotels at 5.23 nights per trip on average) and 7.47 nights per trip in the hotel apartment segment (the highest was in Standard Apartments at 7.58 nights per trip on average). Across all hotels and hotel apartments, average length of stay has dropped 3% compared to H1 last year.

The increases in visitor arrivals and occupancy come during a six-month period packed with large scale events, festivals and openings of new landmarks such as the National Museum of Qatar, 21 High St Katara, and the outdoor section of the Angry Birds Theme Park.

Moving into the summer months, Qatar National Tourism Council (QNTC) is capitalizing on these developments by introducing Qatar's largest ever summer season, with attractions organised by QNTC in collaboration with over 30 partners from the public and private sectors. A key attraction is the introduction of a special summer visa that allows former expatriate residents and family members of current expatriates to obtain an online electronic travel authorisation with great ease.



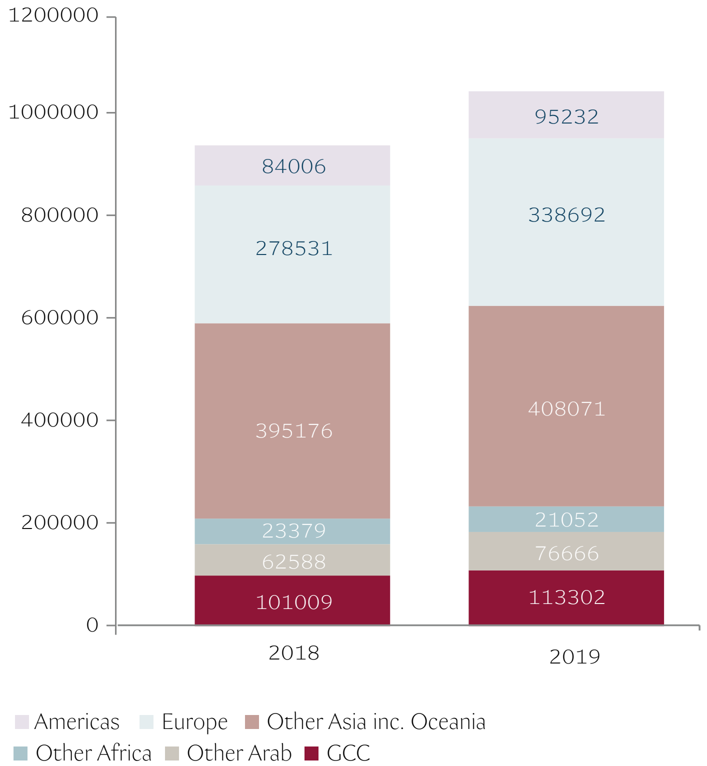
Highlights above represent H1 2019 data for the entire hospitaity accomodation sector (hotels and hotel apartments), with growth from H1 2018

Visitor Arrivals

by Nationality, Grouped by Region

In H1 2019, a total of 1,053,015 visitors came to Qatar, an increase of 11% compared to the same period in 2018. This increase came from a collective positive performance from visitors across all regions, except for nationals of Other Africa (non Arabic), where arrivals dropped by 10%, but only representing a small number in level terms (-2,327 visitors only in total). Visitor arrivals from all other regions showed significant growth; European visitors and Other Arab nationals were both up 22%, nationals from the Americas were up 13%, GCC nationals were up 12%, and nationals from Other Asia, including Oceania were up 3%.

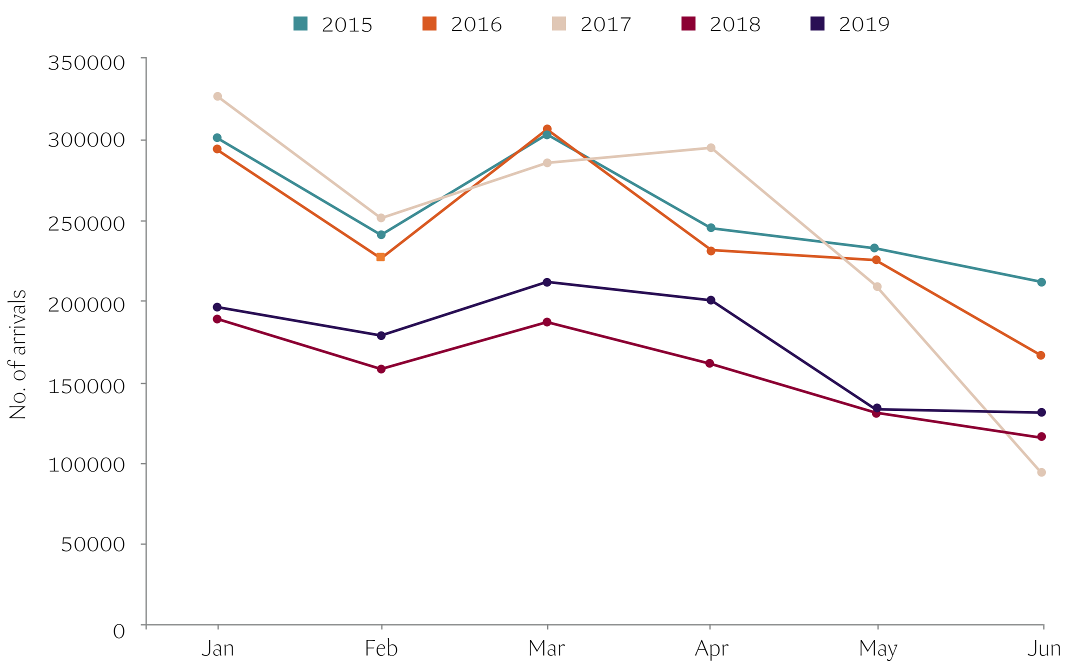
Visitor Arrivals to Qatar by Nationality, Grouped by Region, Jan-Jun 2019 vs Jan-Jun 2018



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

An increase in visitor arrivals was seen in each month during the first half of 2019, compared to the same period in 2018. Similar to visitor arrival patterns seen in the past, monthly visitor arrivals to Qatar are high in January, dip in February, rebound to reach their highest in March and dip again in the following months.

Monthly Arrivals to Qatar Through Midyear, 2015-19



211,966
(+13%)
Visitor arrivals in March 2019

March 2019
The highest number of visitor arrivals YTD

As compared with H1 2019

Hospitality Accommodation

Hotel and Hotel Apartment Performance

Seven new properties opened in H1 2019, bringing 1,436 new hotel rooms to the market. Qatar now has a total of 27,378 rooms (across 130 properties), representing an 8% increase in room supply compared to H1 2018.

The occupancy rate across all hotels and hotel apartments was 65% in H1 2019, representing an 8% increase compared to H1 2018. It is worth noting that an increase in occupancy rates was achieved across all hotel classifications, however, they remained the same across all hotel apartments in comparison to the same period in 2018.

The Average Room Rate (ARR) across all hotels and hotel apartments in the first six months of 2019 was down 5% (at 370 QAR) compared to the same period in 2018. The slight drop in ARR paired with a significant increase in demand (up 19%), allowed for a positive increase in Revenue per Available Room (RevPAR), which was up 3% (at 242 QAR) across all hotels and hotel apartments in H1 2019, compared to H1 2018.

There was a slight drop of 3% in the average length of stay (ALOS) across all hotels and hotel apartments in H1 2019 (3.76 nights per trip) compared to H1 last year (3.88 nights per trip). The most significant and main driver of this drop in ALOS was a result of the drop in average length of stay at Deluxe Hotel Apartments, currently at 7.58 nights per trip compared to 15.42 nights per trip in H1 2018.

Accommodation Sector Summary Perfomance Indicators, YTD Jan-Jun 2019 vs Jan-Jun 2018

	2018 YTD				2019 YTD				% Change 2018-19			
	Occ	ARR	RevPAR	ALOS	Occ	ARR	RevPAR	ALOS	Occ	ARR	RevPAR	ALOS
All	60%	391	236	3.88	65%	370	242	3.76	8%	-5%	3%	-3%
All Hotels	59%	398	235	3.54	65%	376	242	3.54	9%	-6%	3%	0%
All Hotel Apartments	72%	337	244	12.80	73%	323	235	7.47	0%	-4%	-3%	-42%
5 Star	57%	579	330	2.93	61%	537	328	3.03	7%	-7%	-1%	3%
4 Star	60%	245	146	5.88	67%	228	152	5.23	12%	-7%	4%	-11%
3 Star	66%	182	121	2.12	76%	176	134	2.50	14%	-3%	11%	18%
1 & 2 Star	62%	145	89	4.78	75%	147	110	3.45	22%	2%	24%	-28%
Deluxe Hotel Apartments	73%	361	265	15.42	72%	351	254	7.44	-1%	-3%	-4%	-52%
Standard Hotel Apartments	68%	224	153	7.13	74%	199	148	7.58	9%	-11%	-3%	6%

+7
Properties

+8%
Room Supply

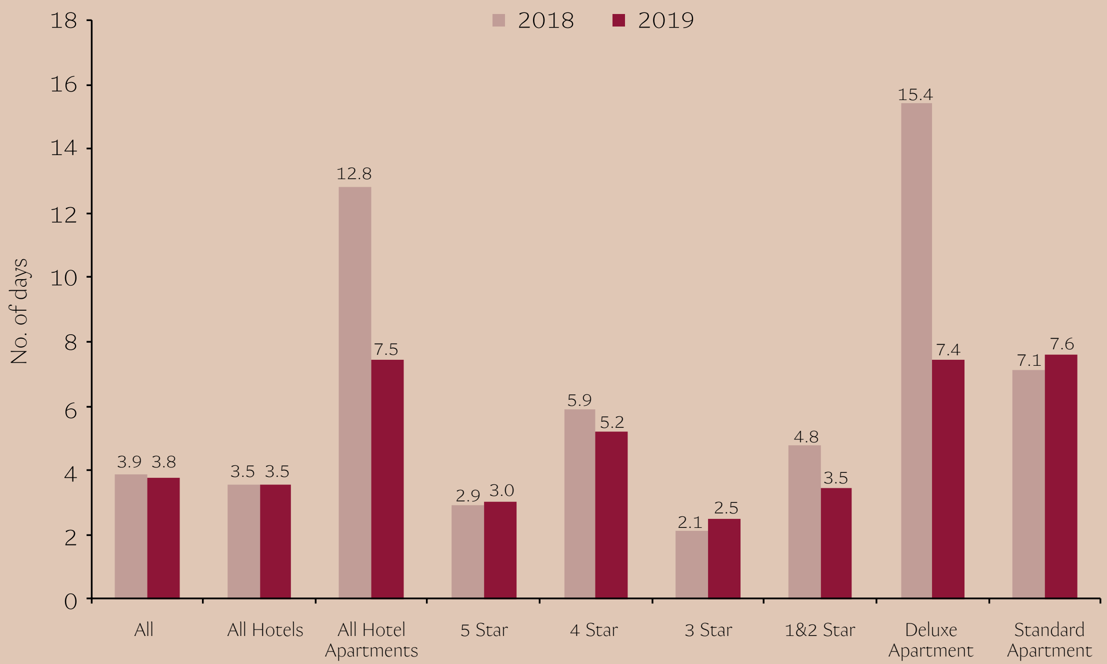
+19%
Demand

65%, +8%
Occupancy

370 QAR, -5%
ARR

242 QAR, +3%
RevPAR

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



Hotel Performance

The occupancy rate across all hotels in H1 2019 was 65%, up 9% compared to H1 2018. The highest occupancy rate (76%) was seen in the three-star classification and the lowest (61%) was seen in the five-star classification.

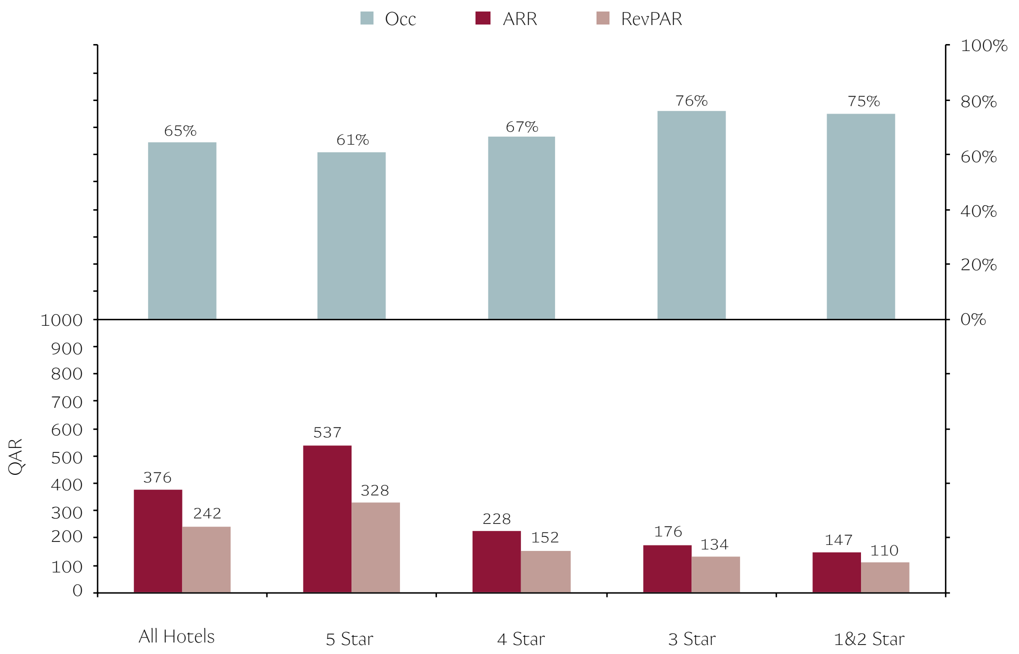
The ARR and RevPAR across all hotels in H1 2019 were 376 QAR (down 6% compared to H1 2018) and 242 QAR (up 3% compared to H1 2018) respectively. The highest ARR continues to be seen in the five-star classification at 537 QAR.

Hotel ARR
376 QAR
(-6%)

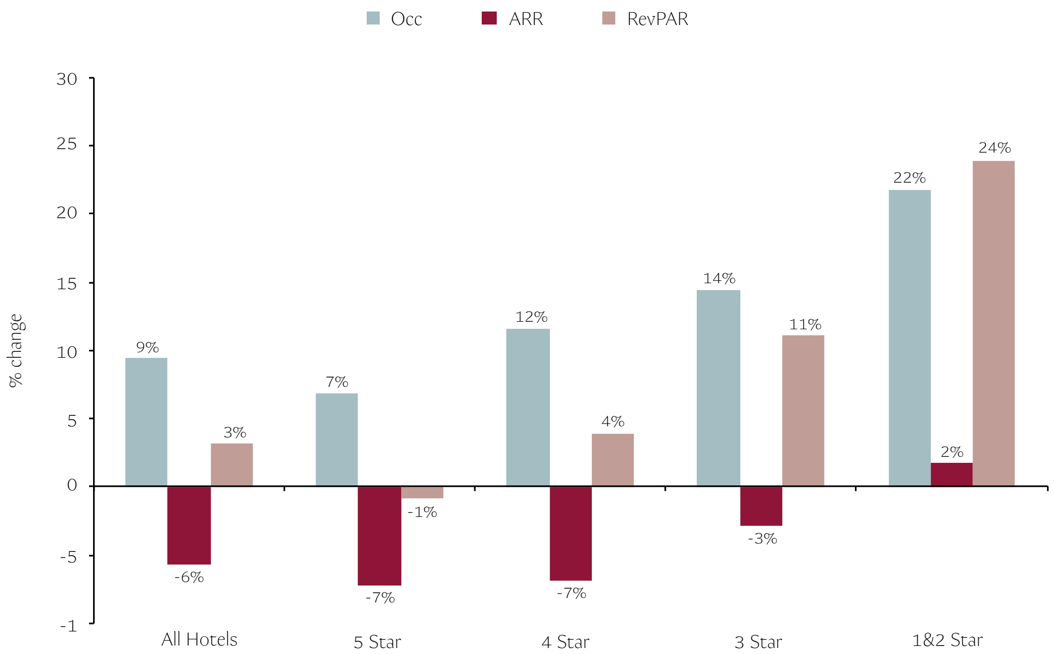
Hotel Occupancy
65%
(+9%)

Hotel RevPAR
242 QAR
(+3%)

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



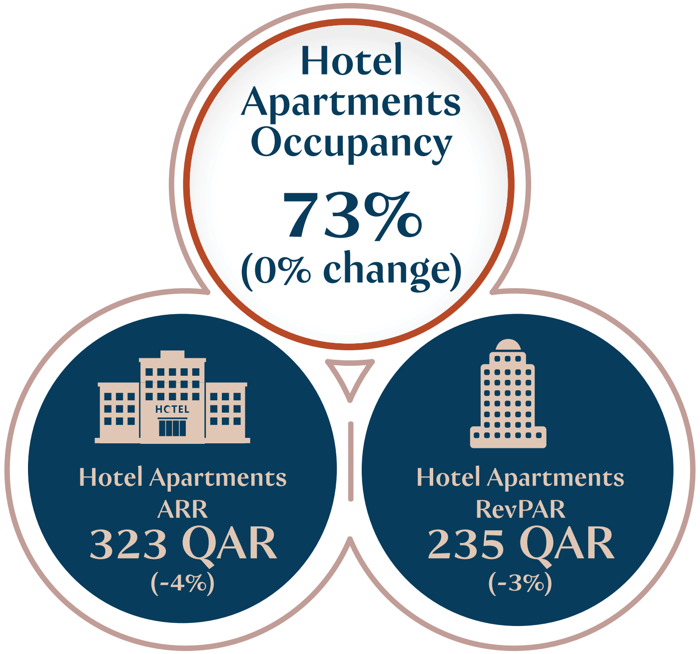
Occupancy Rate, ARR, and RevPAR, % change Jan-Jun 2019 vs Jan-Jun 2018 by Hotel Classification



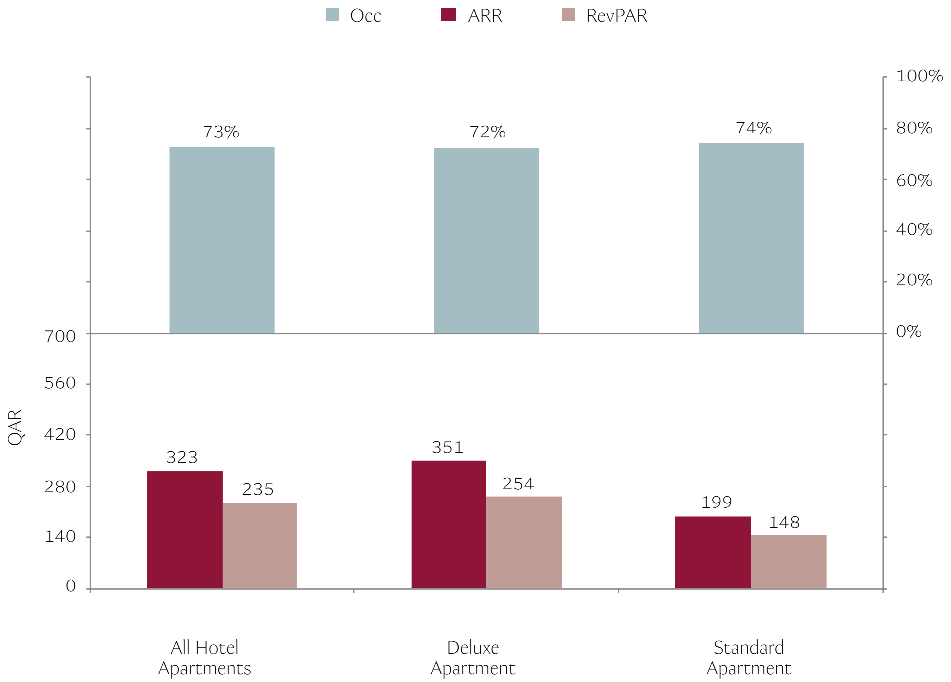
Hotel Apartment Performance

The occupancy rate across all hotel apartments in H1 2019 was 73%, the same occupancy seen in H1 2018. A slightly higher occupancy rate (74%) was seen in the Standard Hotel Apartments classification, in comparison to the Deluxe Hotel Apartments classification (72%).

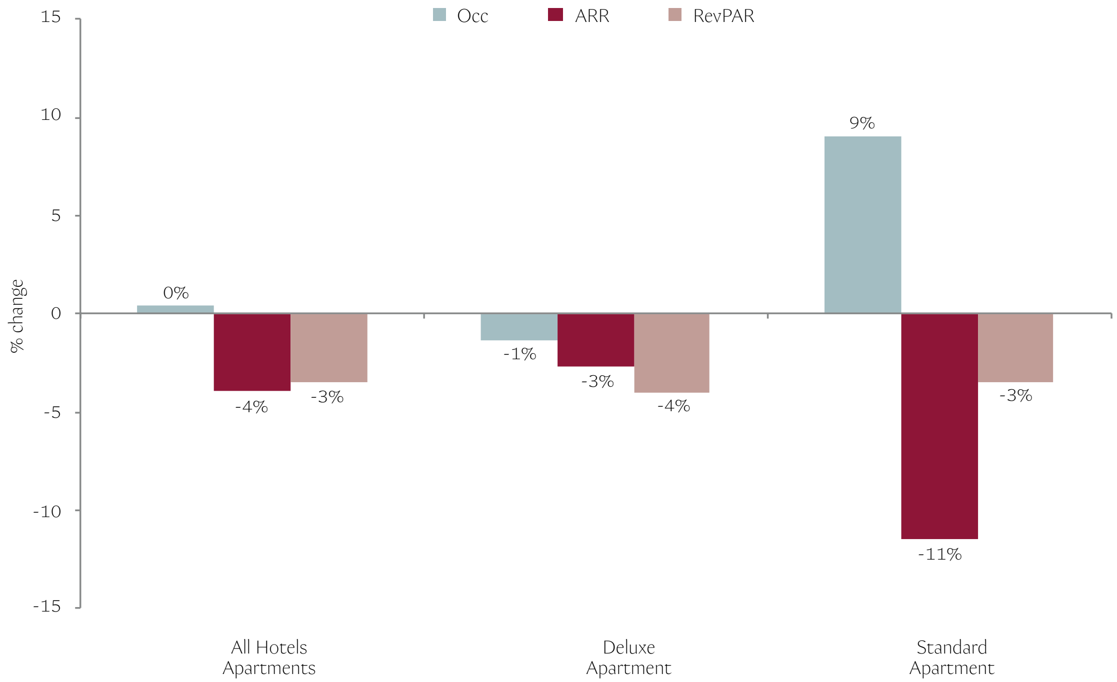
The ARR and RevPAR across all hotel apartments in H1 2019 were 323 QAR (down 4% compared to H1 2018) and 235 QAR (down 3% compared to H1 2018) respectively. The highest average room rate continues to be seen in the Deluxe Apartments classification at 351 QAR.



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



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



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