



Q3 Performance Summary

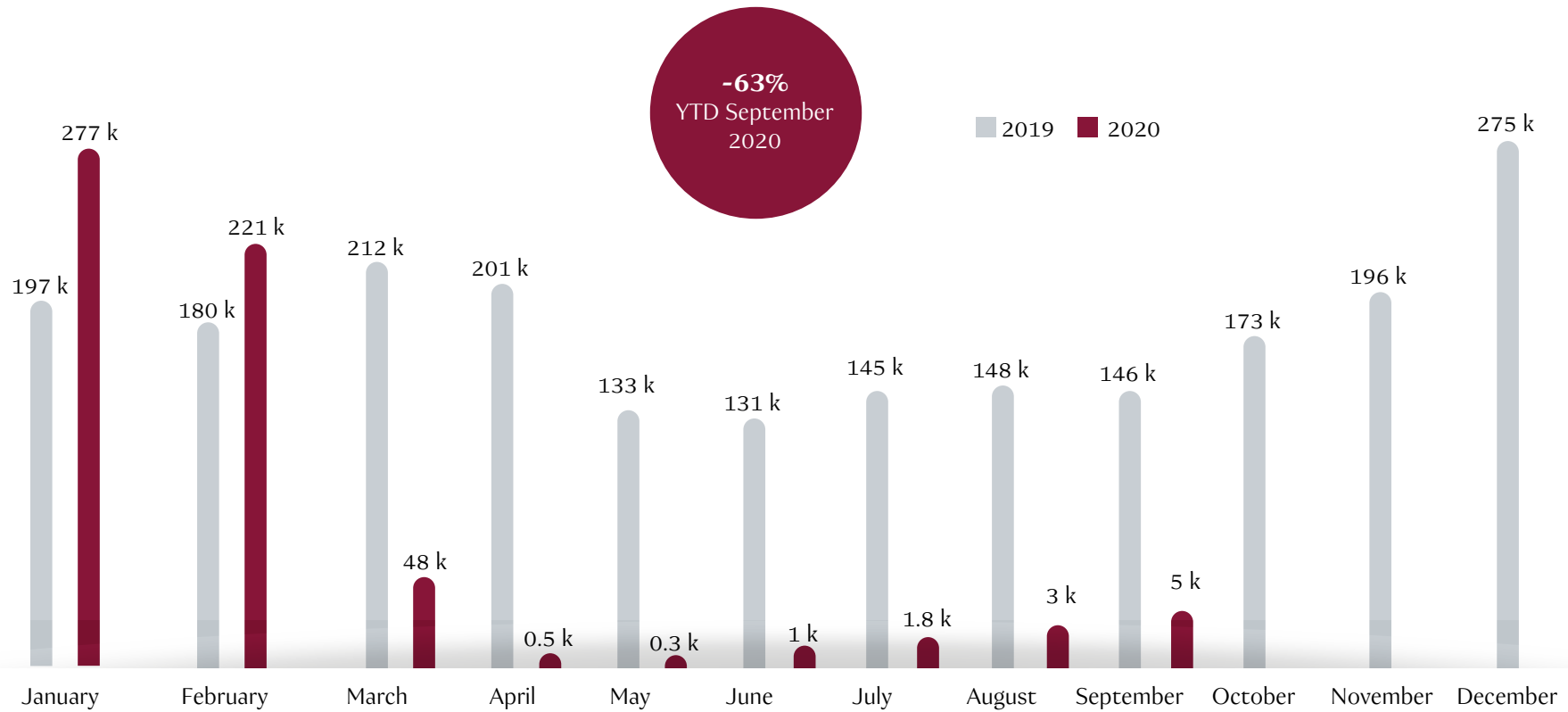
September 2020

Highlights

- Due to continued border closures in response to the global COVID-19 pandemic, total visitor arrivals were down 63% at the end of Q3 2020, in comparison to Q3 2019.
- With the exception of Russia (due to extraordinary increases in cruise arrivals prior to March), year-to-date visitor arrivals from Qatar's top 15 nationalities have all declined in comparison to 2019.
- Qatar's hospitality sector continues, of course, to be negatively impacted by the global pandemic. However, Q3 hotel performance has shown some improvement over Q2 2020.
- Removing hotel properties that are being used for quarantine purposes in response to the pandemic, the average occupancy rate in September 2020 was 54%. Average occupancy year-to-date Q3 2020 was also 54%.

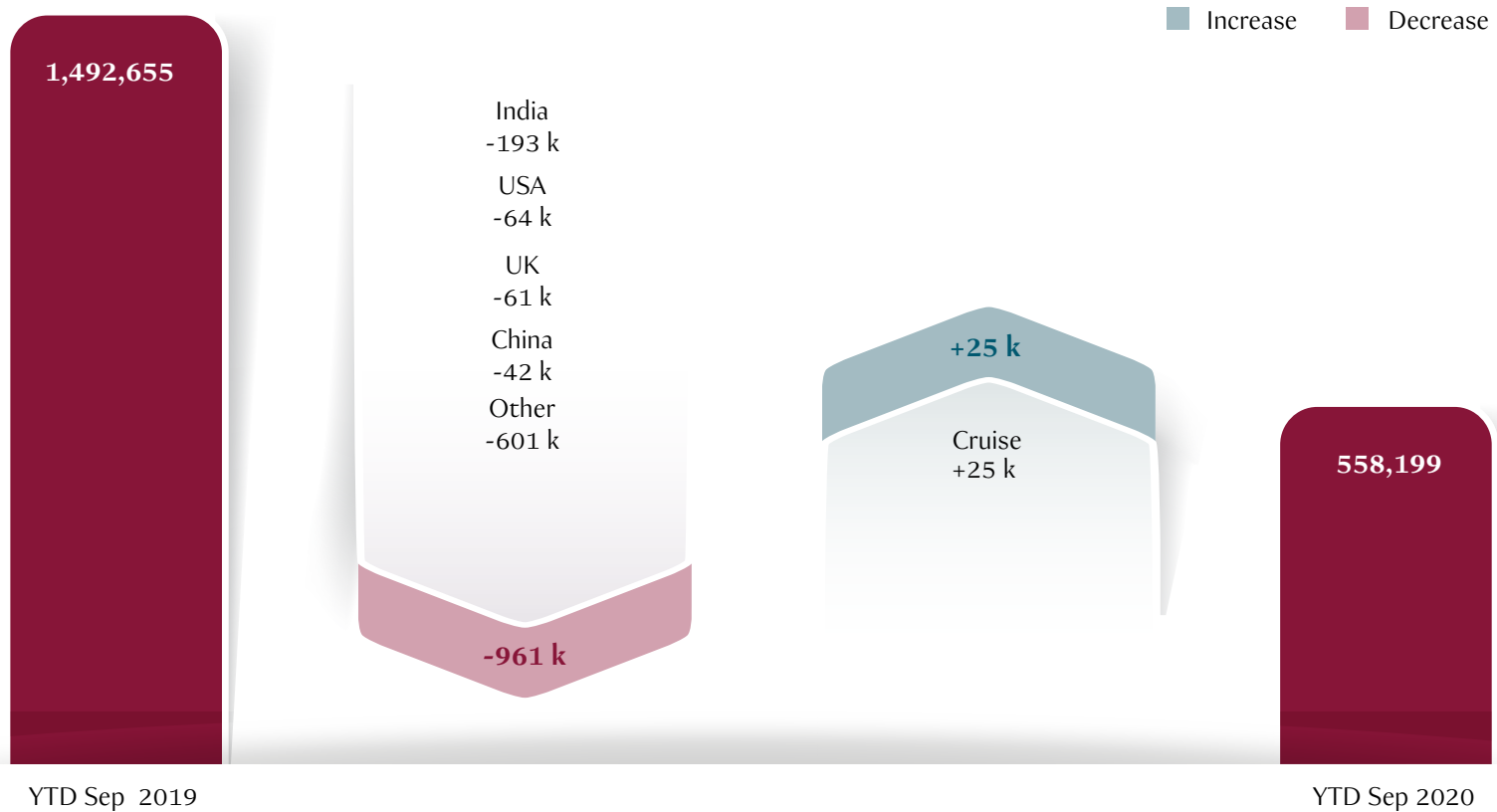
Arrivals by month 2020 vs. 2019

“ Throughout Q3 2020 visitor arrivals remained virtually non-existent, due to continued border closures in response to the global COVID-19 pandemic. Year-to-date visitor arrivals are now down 63% compared to YTD September 2019. ”

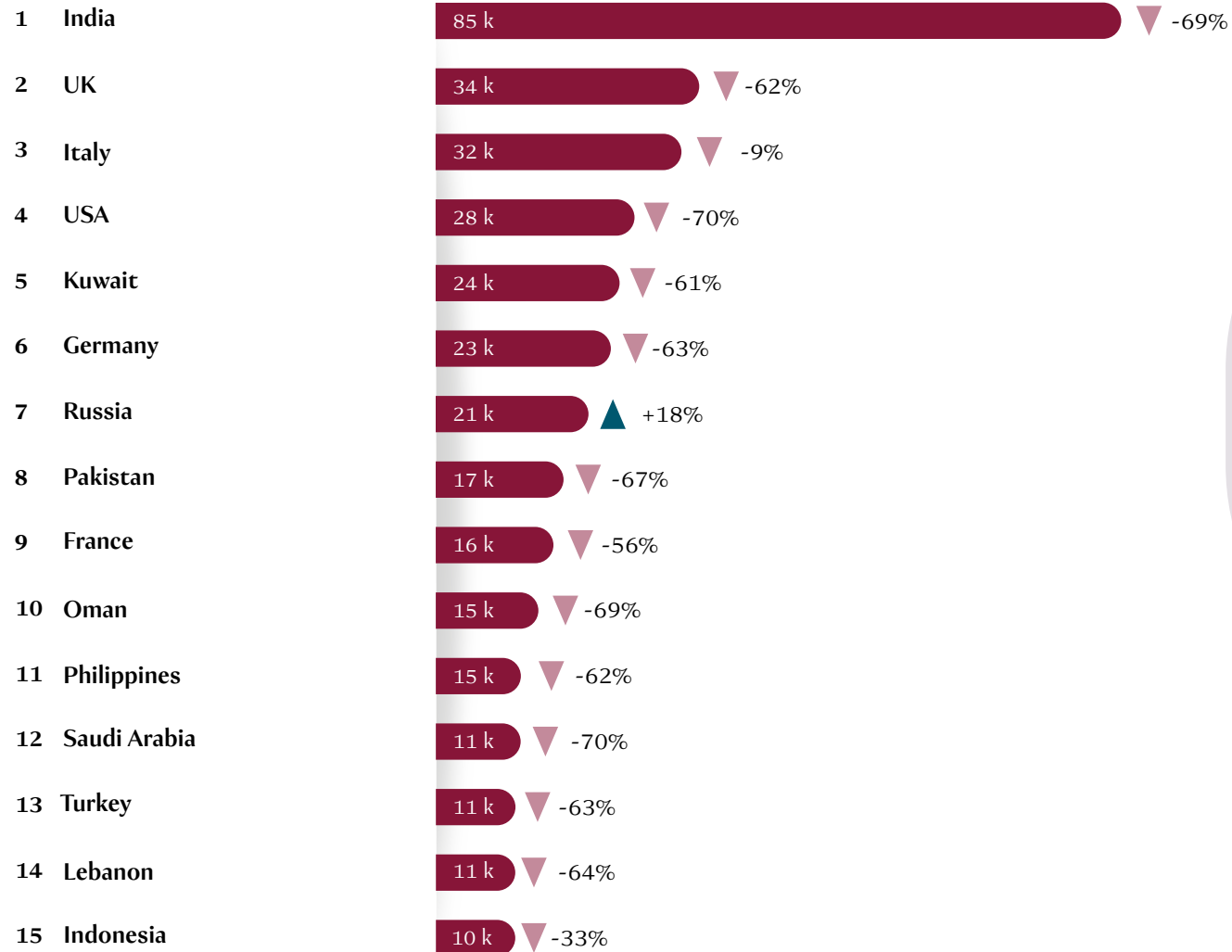


Visitor arrivals sources of change YTD Sep 2020

“Border closures related to the pandemic have resulted in visitation declines across all markets. Only cruise passengers are still showing increases YTD Q3 2020, due to very strong performance of the cruise sector in January and February.”



Top 15 nationalities YTD Sep 2020* vs. YTD Sep 2019

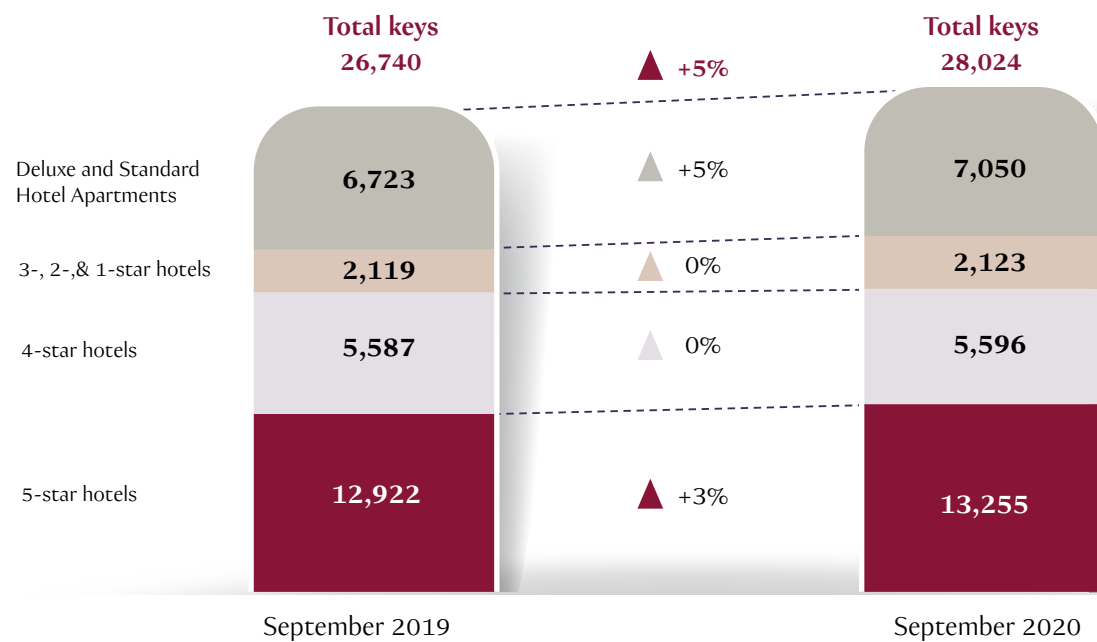


“With the exception of Russia, which had record numbers of cruise passengers before March of this year, visitor arrivals from all of Qatar’s top 15 nationalities have declined in comparison to 2019.”

*Other nationalities YTD 2020: **206 k** | Source: Ministry of Interior

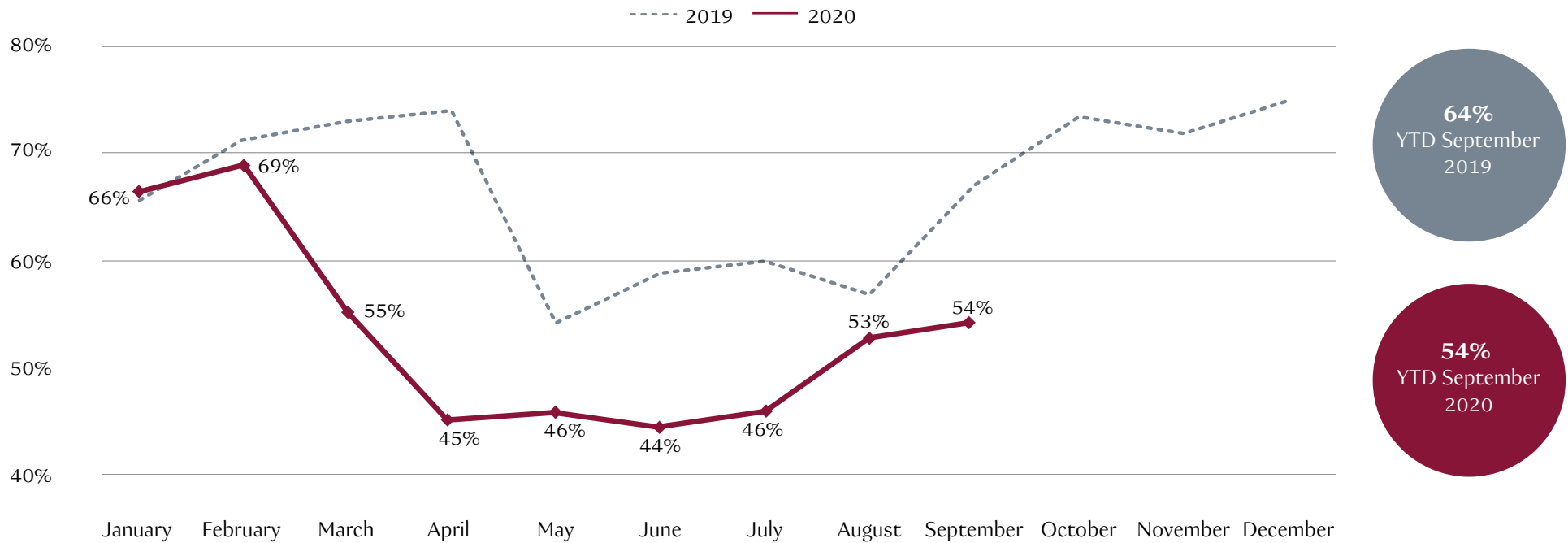
Existing supply (Keys) September 2020 vs. September 2019

“ Room key supply across Qatar’s hospitality sector has increased by 5% compared to the end of Q3 2019.”



Full market* occupancy rate 2020 vs. 2019

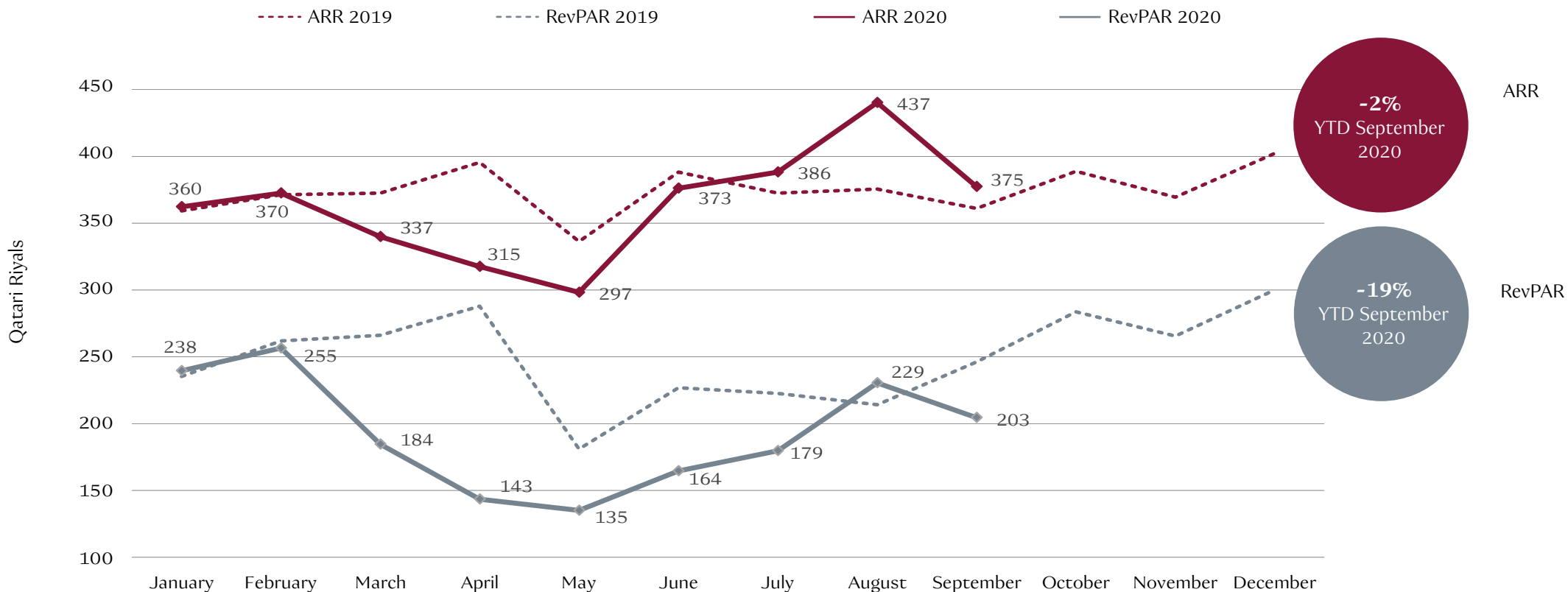
“Despite the continued suppression of hotel performance, occupancy rates did increase across each month of Q3 reaching 54% in September. Average occupancy YTD September 2020 is also 54%, representing a 16% decline in comparison to YTD September 2019.”



*NOTE: Properties that have been leased or donated as quarantine/Covid - 19 response facilities have been removed from the full market data set for the months of March through September.

Full market* ARR and RevPAR 2020 vs. 2019

“ Similar to occupancy rates, ARR and RevPAR improved in Q3 in comparison to Q2 2020. While occupancy consistently rose across Q3, ARR and RevPAR fluctuated, with peak levels in August. ARR and RevPAR are down -2% and -19% respectively YTD Q3 2020 in comparison to the YTD Q3 2019. ”



*NOTE: Properties that have been leased or donated as quarantine/Covid - 19 response facilities have been removed from the full market data set for the months of March through September.

Accommodation units (status as of 30 September 2020)

	Hotels		Hotel Apartments		Total	
	Keys	Rooms	Keys	Rooms	Keys	Rooms
5-Star	13,255	14,754	1,889	3,192	15,144	17,946
4-Star	5,596	6,583	4,644	5,295	10,240	11,878
3-Star	1,887	1,934	268	354	2,155	2,288
2-Star	236	236	88	88	324	324
1-Star	0	0	161	185	161	185
Total	20,974	23,507	7,050	9,114	28,024	32,621

For further information, please contact:
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