Tourism Performance Report
Q1 2019

QATAR
المجلس الوطني للسياحة
National Tourism Council

Introduction

Visitor Arrivals

Qatar welcomed 588,072 visitors* in the first quarter of 2019, representing a 10% increase compared to the same quarter in 2018. Visitor arrivals peaked in **March** with **over 200,000 visitors – the highest monthly total arrivals** since the beginning of the blockade.

This could be attributed to a range of events which occurred in that month, attracting international visitors. These events included the opening of the National Museum of Qatar, the launch of the retail quarter of Katara Cultural Village, and the milestone 10th Anniversary edition of the Qatar International Food Festival.

Significant growth was seen **across visitors from nearly all regions** in Q1 2019, the only exception being Other African nationals, whose numbers dropped.

Cruise visitor arrivals continued to show growth, in Q1 2019. Doha Port hosted 24 ships with 62,145 passengers (up 104% from Q1 2018). This provided a great boost in visitor arrivals, particularly among German nationals (up 64% in Q1 2019 compared to Q1 2018), who have now replaced UK nationals as Qatar's second largest market after India. In Q1, cruise ships alone brought in over 28,000 German visitors, representing over half of all German visitors to the country.

+10%

588,072
Visitor arrivals

24 Cruise ships
hosted by Doha Port

+104%

62,145
Cruise visitors

Highlights above represent Q1 2019 data, with growth from Q1 2018

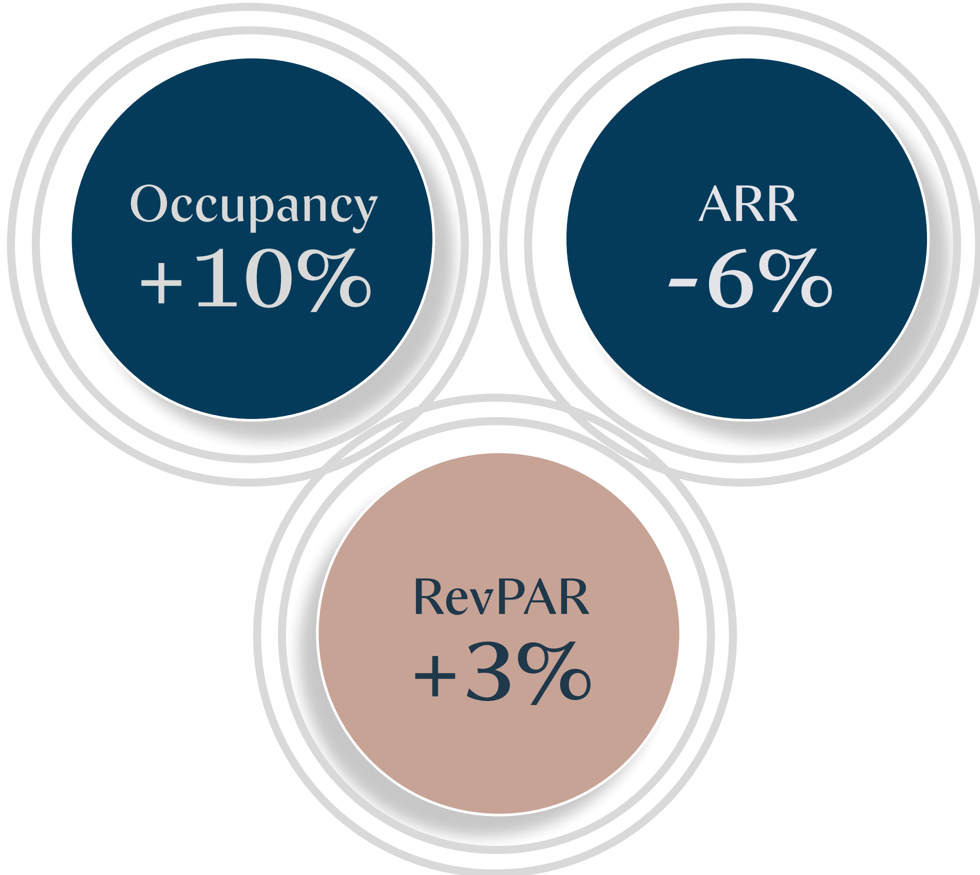
*A visitor is a traveler taking a trip to a main destination outside of his/her usual environment, for less than a year, for any main purpose (business, leisure or other personal purpose) other than to be employed by a resident entity in the country or place visited. A visitor (domestic, inbound or outbound) 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

This sector witnessed an overall increase - in demand, supply and occupancy rates (up across all hotel and hotel apartment classes.) Q1 saw a 7% increase in accommodation room supply, compared with the same period in 2018. Demand grew by 16%, resulting in an overall 10% increase in occupancy during Q1 2019. It is worth mentioning that occupancy was up across all hotel and hotel apartment classes in the first quarter of 2019 compared to the same quarter in 2018.

Overall, Average Room Rate (ARR) was down by 6% across all hotels and hotel apartments. However, Revenue Per Available Room (RevPAR) was up 3% in Q1 2019, in comparison to Q1 2018.

The Average Length of Stay (ALOS) for visitors in Qatar across all hotels and hotel apartments (3.87 nights per trip) has remained virtually the same in the first three months of 2019 as Q1 last year; however, it increased amongst the hotels segment (up 2%) and decreased in the hotel apartments segment (down 24%).



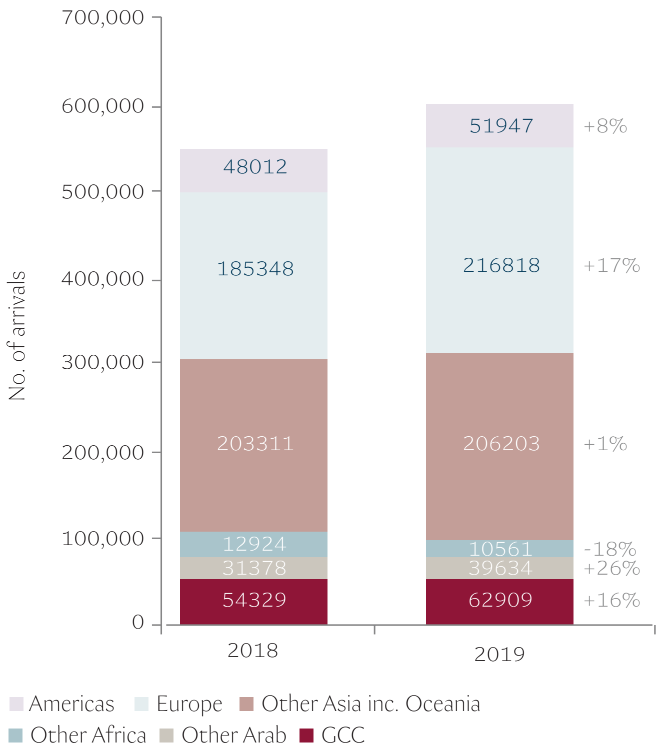
Highlights above represent Q1 2019 data for the entire hospitaity accomodation sector (hotels and hotel apartments), with growth from Q1 2018

Visitor Arrivals

Arrivals by Nationalty, Grouped by Region

In Q1 2019, a total of **588,072 visitors** came to Qatar, an **increase of 10%** compared to the same period in 2018. This is due to a collective positive performance from visitors across all regions, except for Other Africa. Arrivals from nationals of the Other Africa region dropped by 18%, but only representing a small number in level terms (-2,462 visitors in total). Visitor arrivals from all other regions showed significant growth; Other Arab nationals were up 26%, GCC nationals were up 16%, European visitors were up 17%, nationals from the Americas were up 8%, and nationals from Other Asia, including Oceania, were up 1%.

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



Visitor arrival highlights

588,072
visitor arrivals to Qatar in Q1 2019

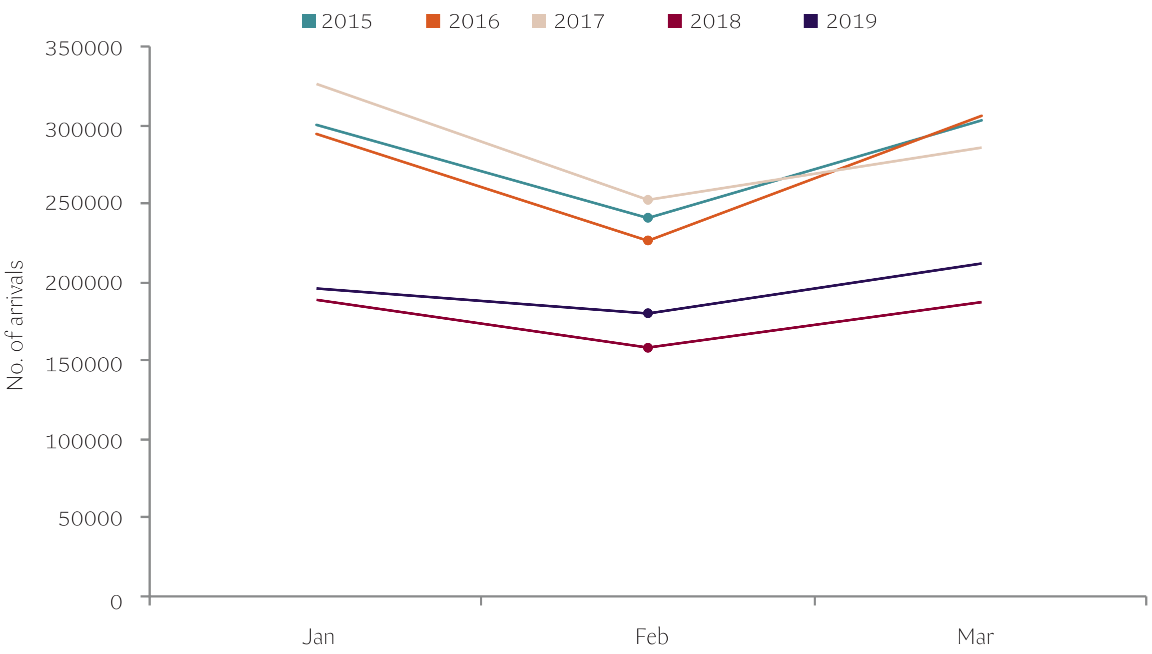
Arrivals up
10%
compared to Q1 2018

Growth across all regions, except Other Africa region

Arrivals by Month (January to March, 2015-2019)

The first quarter of 2019 witnessed **month-on-month increases** in visitor arrivals, compared with 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 and rebound in March. **211,966 arrivals in March** marked the **highest** number of monthly visitors since the beginning of the blockade and was an increase of 13% compared to March 2018.

Visitor Arrivals to Qatar by Month, Jan-Mar, 2015-19



As compared with Q1 2018

Hospitality Accommodation

Hotel and Hotel Apartment Performance

Six new properties opened in Q1 2019, adding 1,079 new rooms and representing a **7% increase** in the market **supply** compared to Q1 2018. Qatar now boasts a total of 26,890 rooms across 129 properties.

The **occupancy rate** across all hotels and hotel apartments was **69%** in Q1 2019, representing **a 10% increase** compared to Q1 2018. It is worth noting that all hotel and hotel apartment classifications achieved an increase in occupancy.

The Average Room Rate (ARR) across all hotels and hotel apartments was down 6% (at 366 QAR) in Q1 2019 compared to the same period in 2018. The slight drop in ARR paired with a significant increase in demand (up 16%), allowed for a positive increase in Revenue per Available Room (RevPAR), which was up 3% (at 253QAR) across all hotels and hotel apartments, compared to Q1 2018.

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

	2018 YTD				2019 YTD				% Change 2018-19			
	Occ	ARR	RevPAR	ALOS	Occ	ARR	RevPAR	ALOS	Occ	ARR	RevPAR	ALOS
All	63%	391	246	3.86	69%	366	253	3.87	10%	-6%	3%	0%
All Hotels	62%	397	246	3.53	68%	371	254	3.60	11%	-7%	3%	2%
All Hotel Apartments	73%	343	252	12.70	75%	327	246	9.62	3%	-5%	-2%	-24%
5 Star	60%	569	344	2.96	65%	523	342	3.09	8%	-8%	-1%	4%
4 Star	62%	251	156	5.55	69%	235	163	5.28	12%	-6%	5%	-5%
3 Star	69%	185	127	2.39	80%	179	144	2.69	17%	-3%	13%	13%
1 & 2 Star	55%	151	84	3.38	72%	147	106	3.25	30%	-2%	27%	-4%
Deluxe Apartments	75%	366	274	14.92	76%	352	266	9.64	1%	-4%	-3%	-35%
Standard Apartments	67%	233	156	7.45	74%	202	149	9.52	10%	-13%	-5%	28%

+6 Properties

+7% room supply

+16% Demand

69%, +10% Occupancy

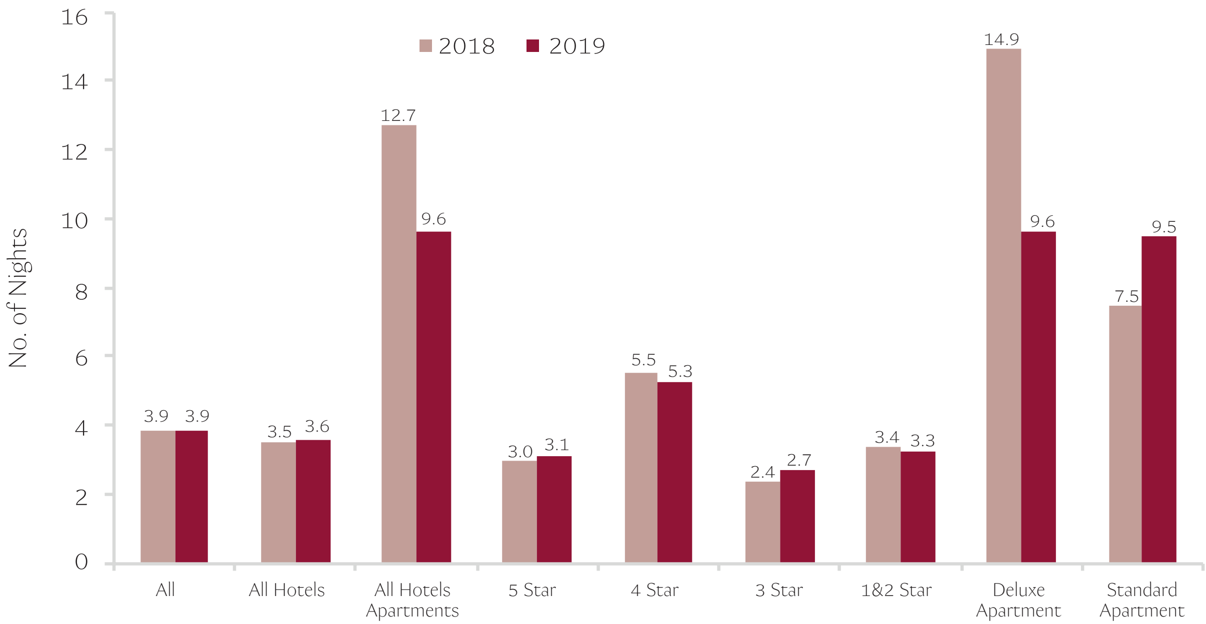
366 QAR, -6% ARR

253 QAR, +3% RevPAR

Hotel and Hotel Apartment Performance

At 3.87 nights per trip in Q1 2019, Average Length of Stay (ALOS) across all hotels and hotel apartments remained on par with Q1 2018 (3.86 nights per trip). However, it was up 2% in the hotels segment at 3.60 nights per trip (highest in 4-Star hotels at 5.28 nights per trip), and down 24% in the hotel apartments segment at 9.62 nights per trip.

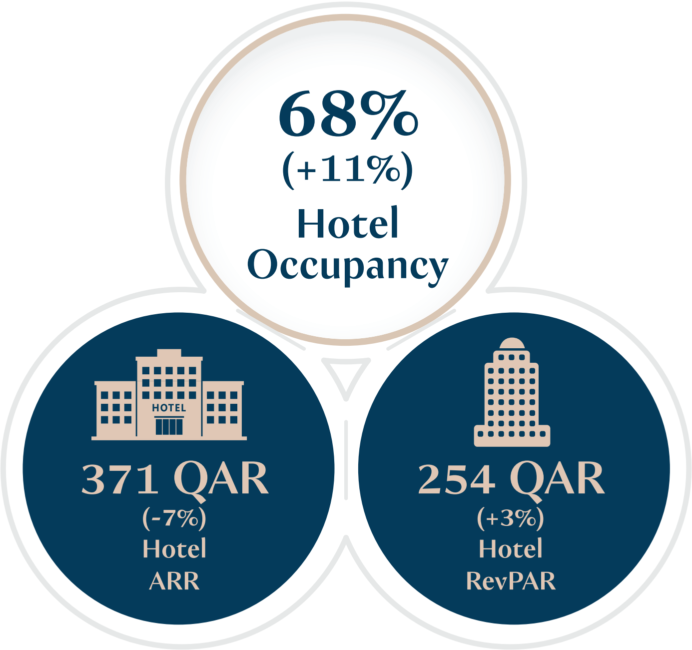
Average Length of Stay by Hotel Classification, Jan-Mar 2019 vs Jan-Mar 2018



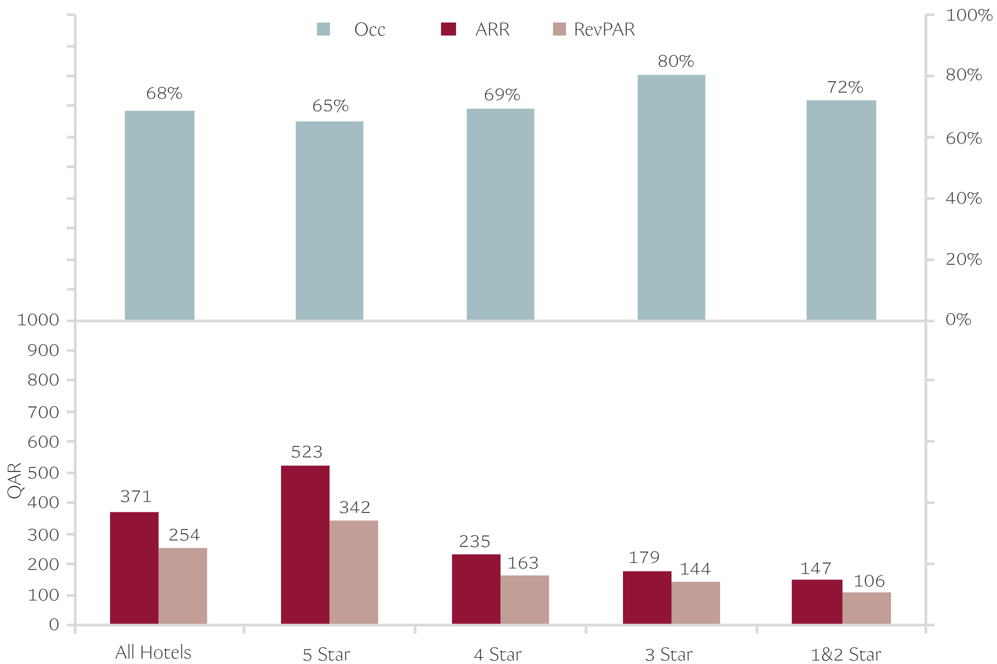
Hotel Performance

The occupancy rate across all hotel classifications in Q1 2019 was 68%, up 11% compared to Q1 2018. The occupancy rate in 3-Star hotels was most robust at 80%, while 5-Star hotels had the lowest occupancy rate, at 65%.

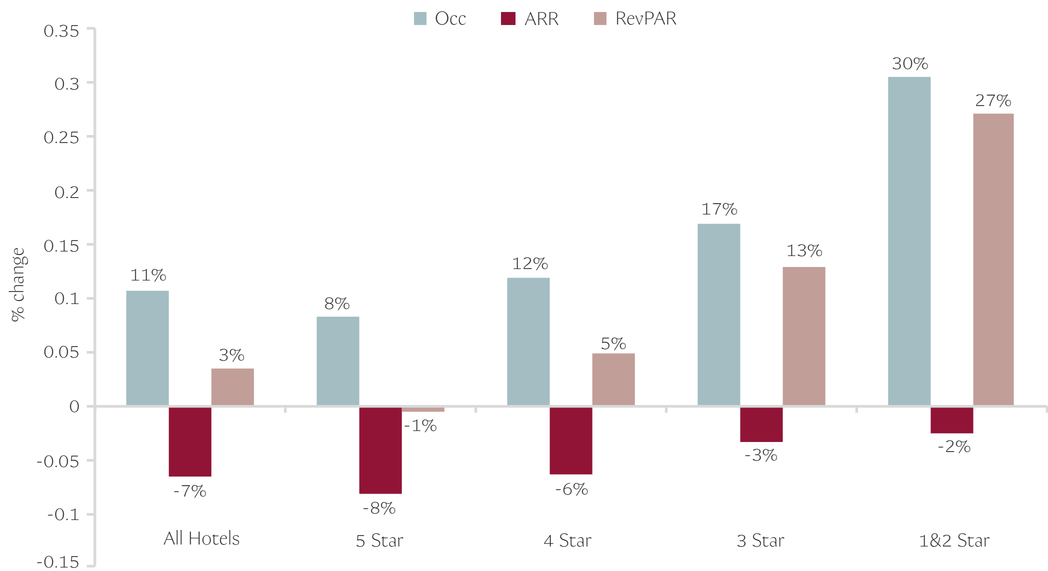
ARR and RevPAR across all hotels were 371QAR (-7% compared to Q1 2018) and 254QAR (+3% compared to Q1 2018) respectively. The highest average room rate continues to be observed in the 5-Star classification at 523QAR.



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



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



Hotel Apartment Performance

The occupancy rate across all hotel apartments in Q1 2019 was 75%, up 3% compared to Q1 2018. A slightly higher occupancy rate was seen in the Deluxe Apartments classification (76%), in comparison to Standard Apartments (74%).

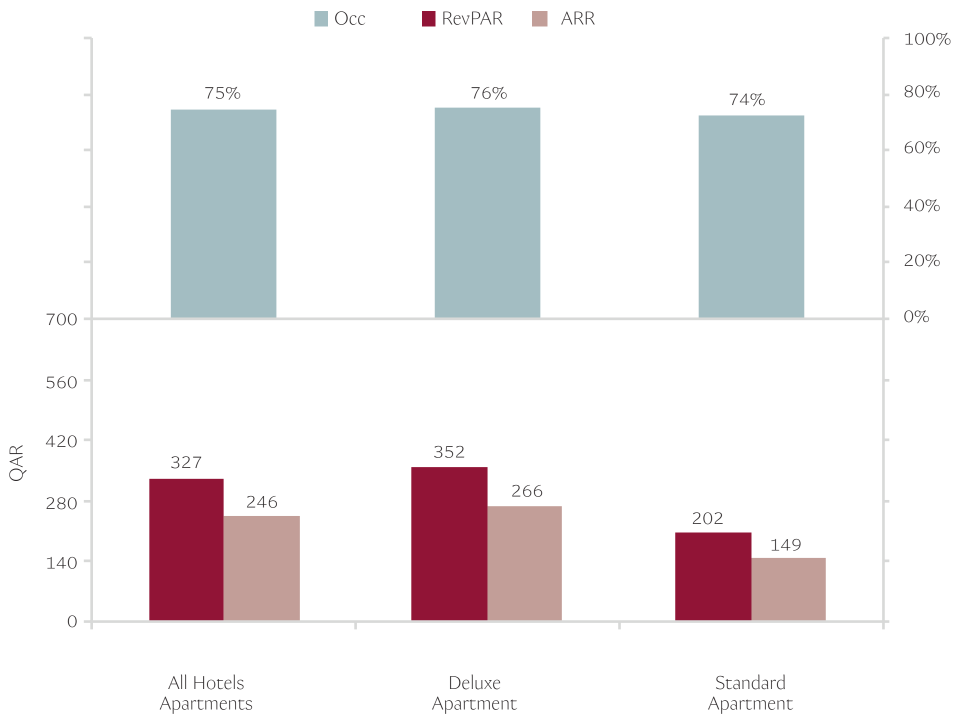
ARR and RevPAR across the hotel apartments segment was 327 (down 5% compared to Q1 2018) and 246QAR (down 2% compared to Q1 2018) respectively. The highest average room rate continues to be seen in Deluxe Apartments at 352QAR.

75%
(+3%)
Hotel Apartments Occupancy

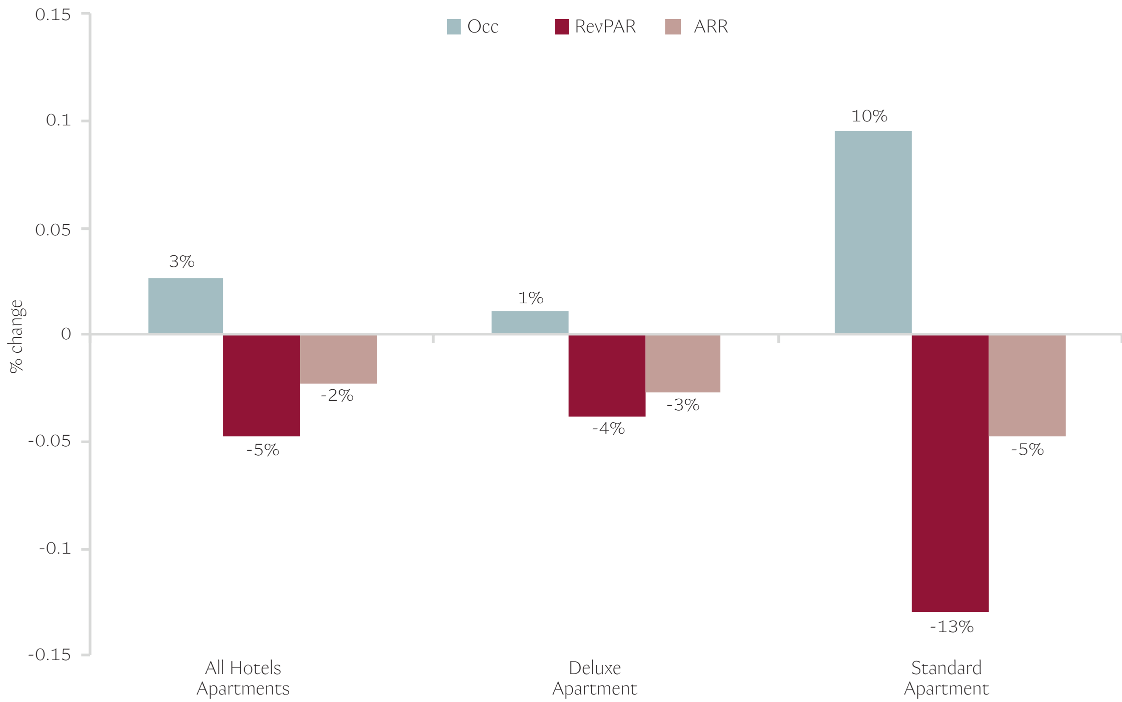
327 QAR
(-5%)
Hotel Apartments ARR

246 QAR
(-2%)
Hotel Apartments RevPAR

Occupancy Rate, ARR, and RevPar by Hotel Apartment Classification, Jan-Mar 2019



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



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