



TOURISM SECTOR PERFORMANCE

Q3 2023

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EXECUTIVE SUMMARY



2853 k international visitors arrived in Qatar by Q3 2023, surpassing FY 2022 arrivals by July 2023

- Split of arrival mode by Q3 2023: Air (54%), Land (37%) and Sea (9%)
- Saudi Arabia continues to be the top contributor to international arrivals for 2023 to Qatar with more than 747 k visitors, contributing 26% of total visitors coming in by Q3 2023.
- Remaining top 10 visitor markets were India (11%), USA (4%), Germany (4%), Oman (4%), Kuwait (4%), UK (4%), Bahrain (4%), U.A.E (3%), Pakistan (2%)
- International arrivals remain steady above pre-pandemic levels demonstrating sustained recovery in tourism post pandemic



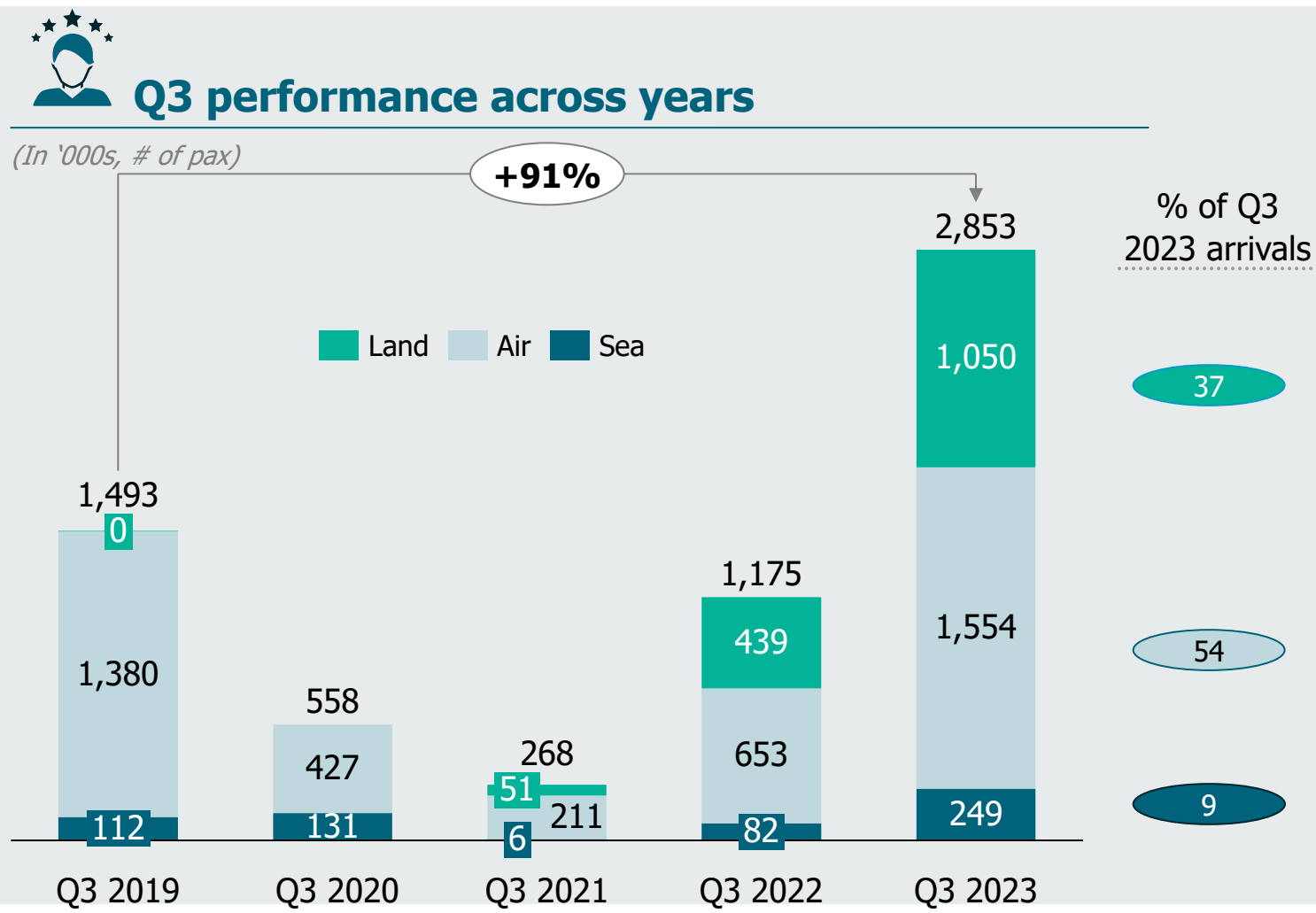
Overall market ADR becomes more affordable; dip in occupancy observed

- Demand continues to grow steadily with growth in tourist arrivals - demand reached 5.6 M room-nights by Q3 2023, 21% above 2019 (pre-pandemic levels) and continues to be highest in last 5 years
- Room supply grew to 38.8 k keys by the end of Q3 2023
- Key hotel industry metrics by YTD Q3 2023:
 - Occupancy: 54% – down by 3% point vs. Q3 2022
 - ADR : 405 QAR – 4% below Q3 2022
 - RevPAR : 218 QAR – down by 9% vs. Q3 2022

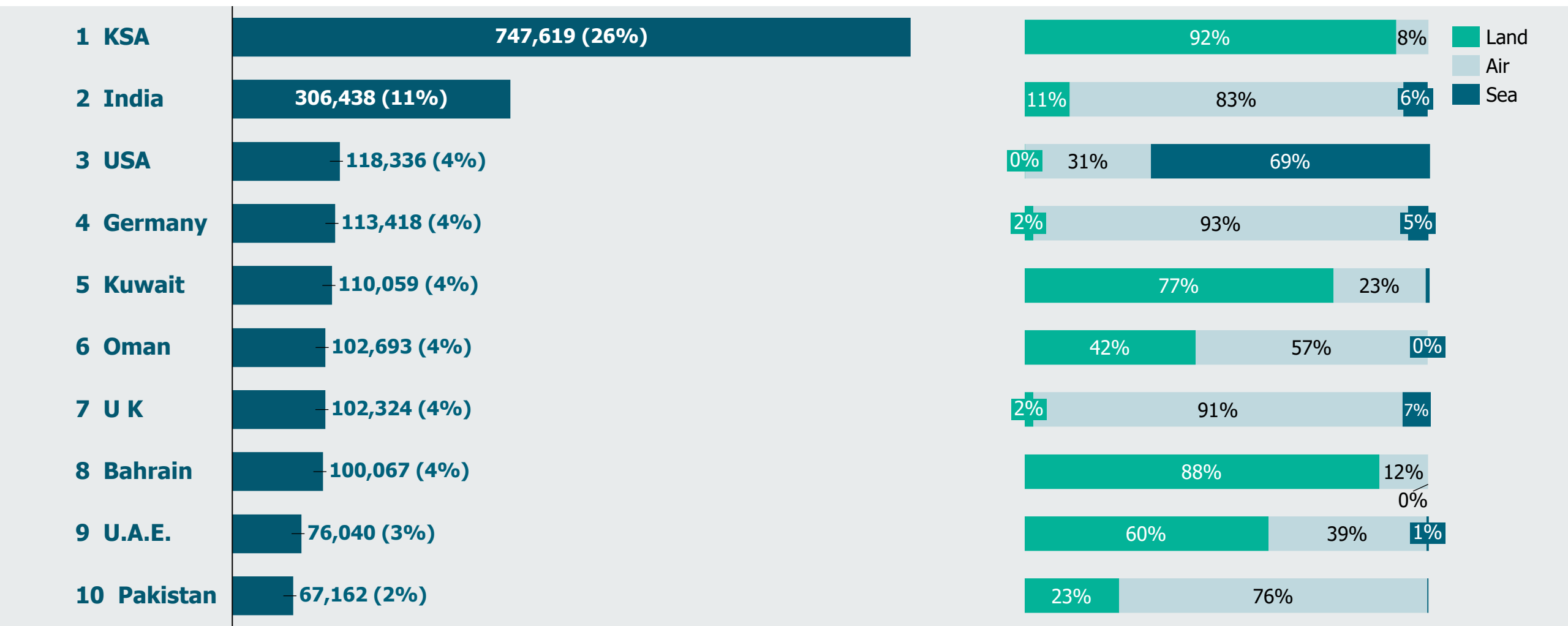
QATAR SURPASSED FY 2022 ARRIVALS BY JULY 2023

Highlights

- International arrivals overtook full-year 2022 arrivals by July 2023
- YTD arrivals display a 91% increase compared to pre-pandemic levels in 2019



KSA HOLDS TOP SPOT WITH 26% OF ALL YTD ARRIVALS



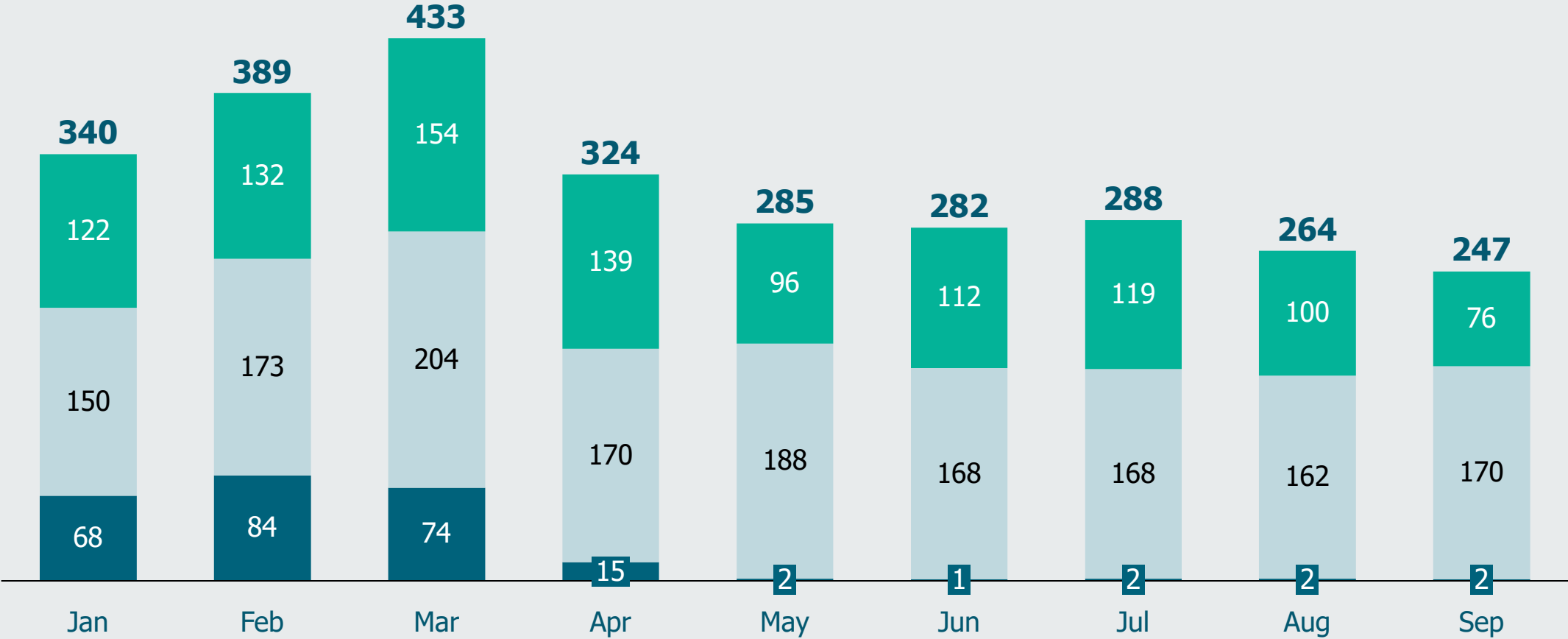
Source: Ministry of Interior, Qatar Tourism

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ARRIVALS STAY STEADY IN LEAD UP TO WINTER MONTHS

(In '000s, # of pax)

Land Air Sea

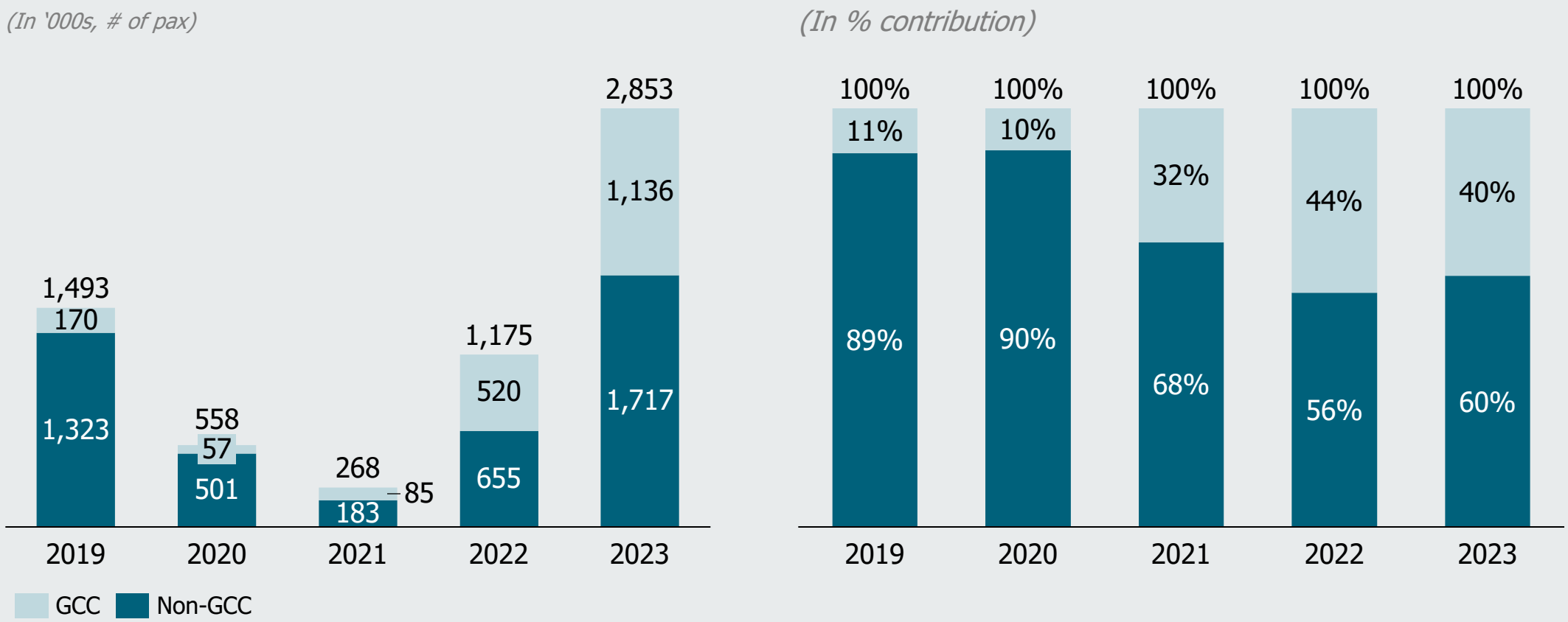


Source: Ministry of Interior, Qatar Tourism

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GCC CONTRIBUTION NOW AT 40% OF ALL ARRIVALS

 **Q3 2023 performance by GCC vs. Non-GCC Countries**



ROOM-NIGHT DEMAND HITS RECORD HIGH OF 5.6 M

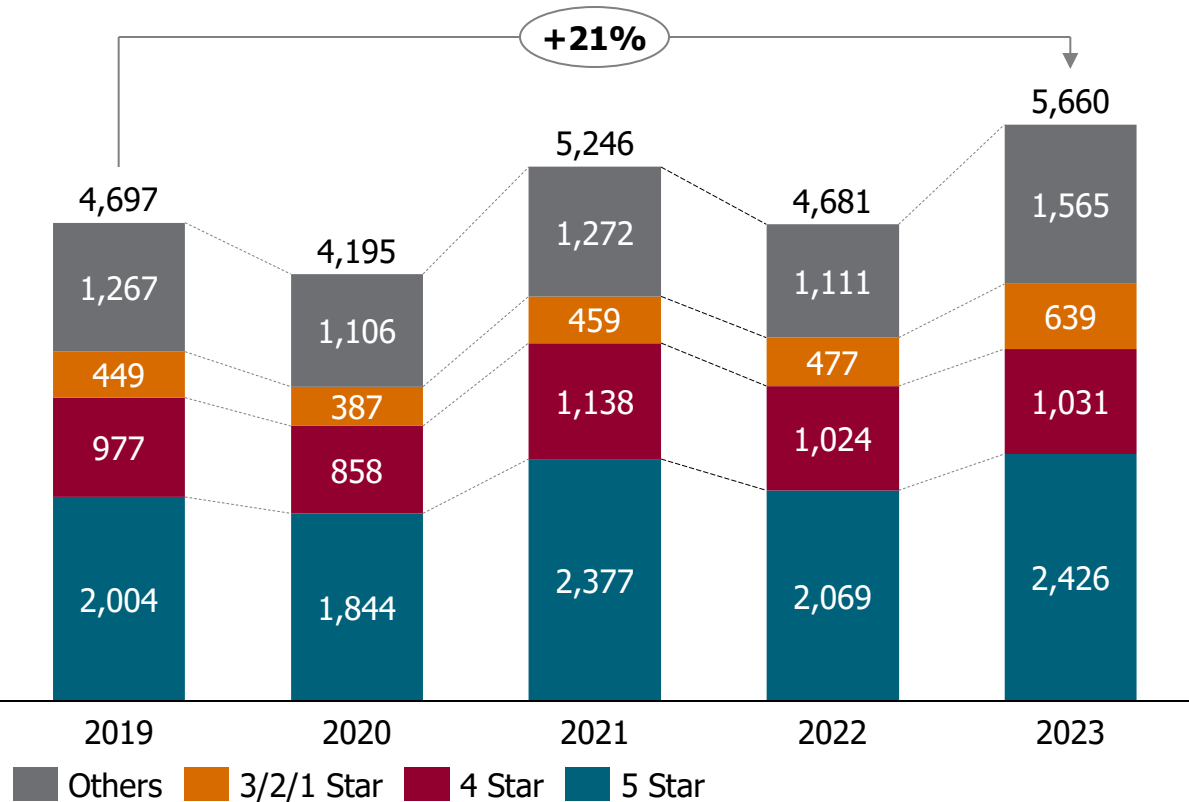
Highest demand in last 5 years by the end of Q3 2023, 21% above pre-pandemic levels (2019)



Room-nights displays growth

Qatar’s tourism continues to experience a boost driven by a special lineup of events during the summer months

of room-nights in Qatar (in 000s)

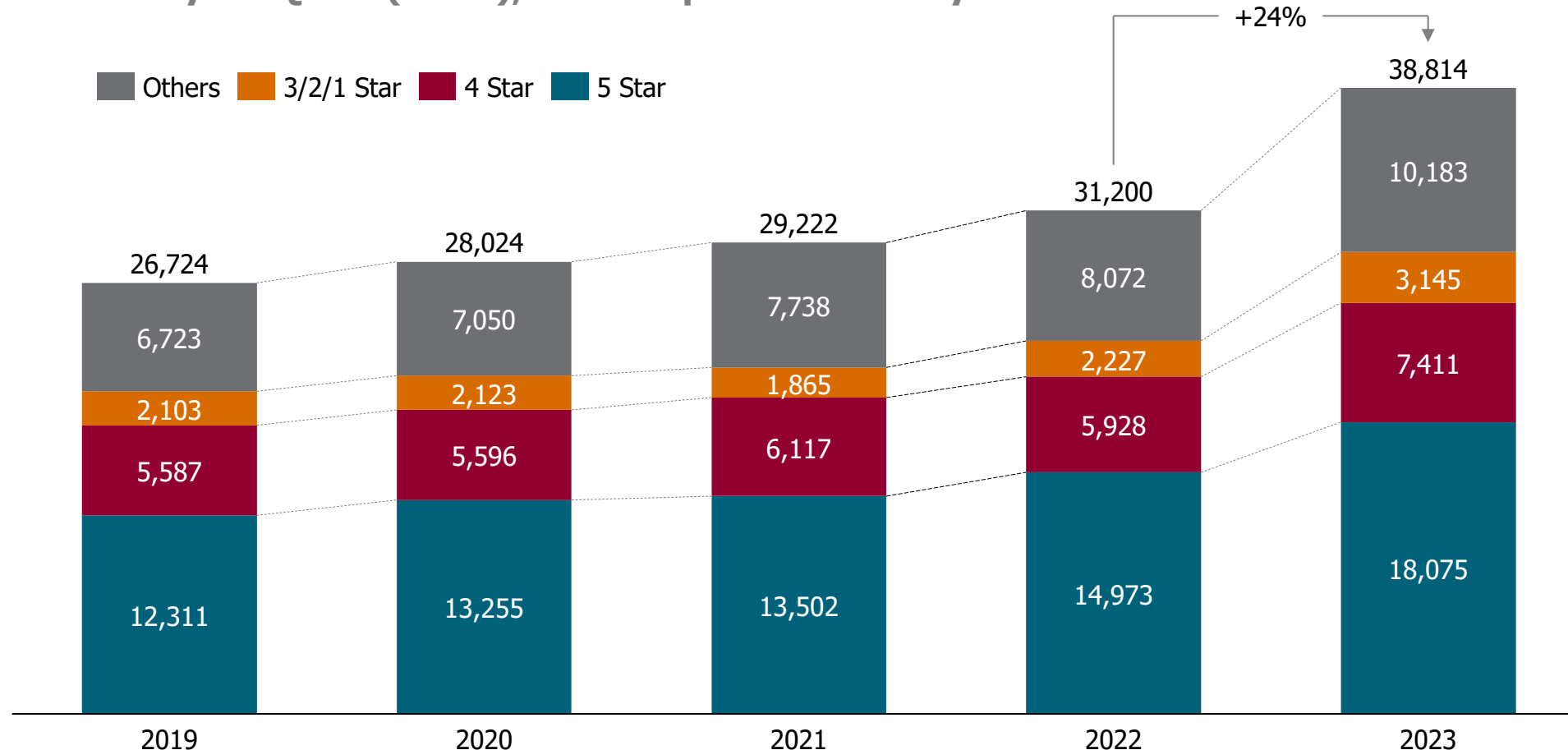


Properties that have been utilized as quarantine/Covid - 19 response facilities are included in the calculation
Category 'Others' includes deluxe and standard hotel apartments, and excludes serviced apartments
Source : STR, Qatar Tourism

ROOM SUPPLY MAINTAINS A STEADY INCREASE

Overall permanent supply grew by 24% to 38.8 k keys (2023) from 31.2 k keys in Q3 2022

of hotel room-keys in Qatar ('000s); as on Sept 30th of each year



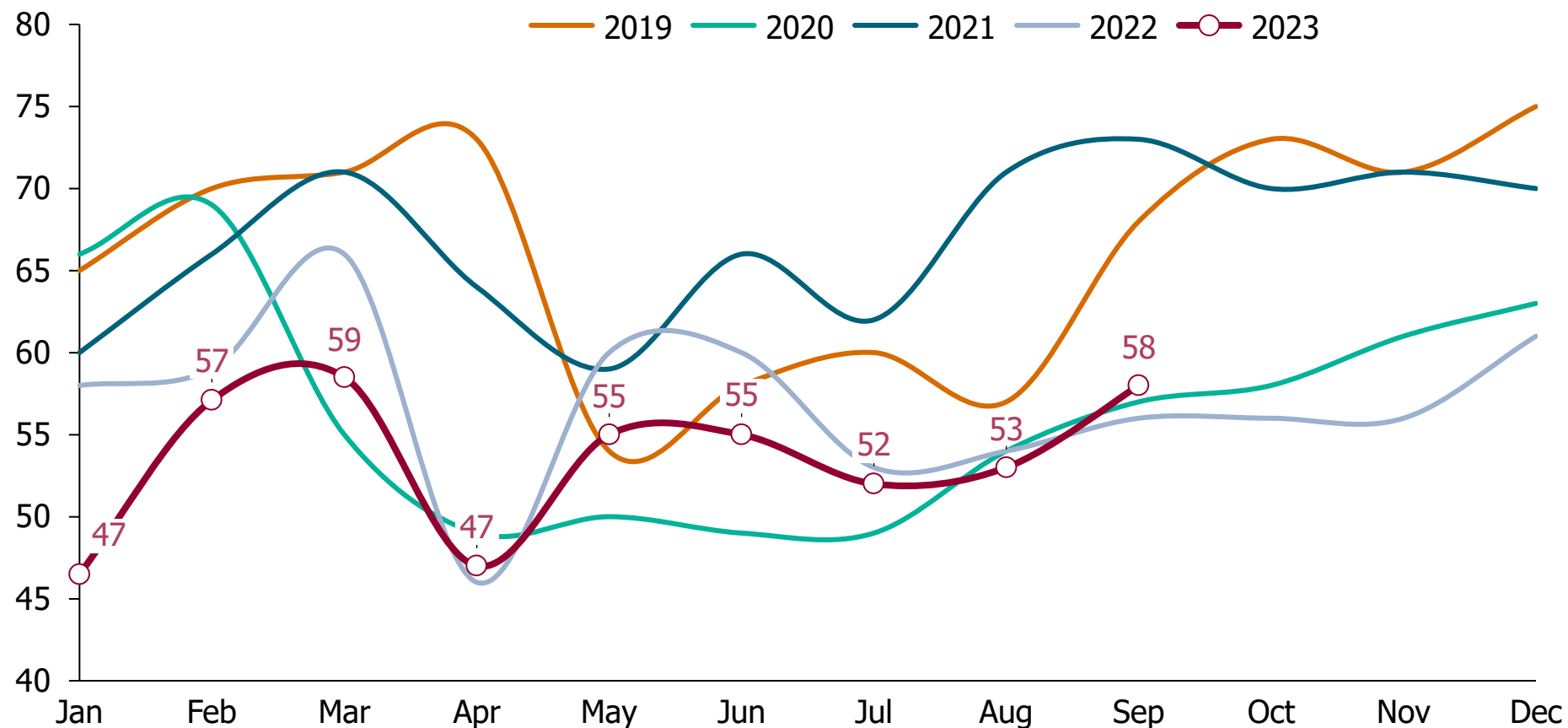
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53% FULL-MARKET YTD OCCUPANCY FOR Q3 2023

Monthly occupancy rates recovered to 58% in September 2023 after slump in first 2 months of quarter



YTD Q3 2023

64%
2019

55%
2020

66%
2021

57%
2022

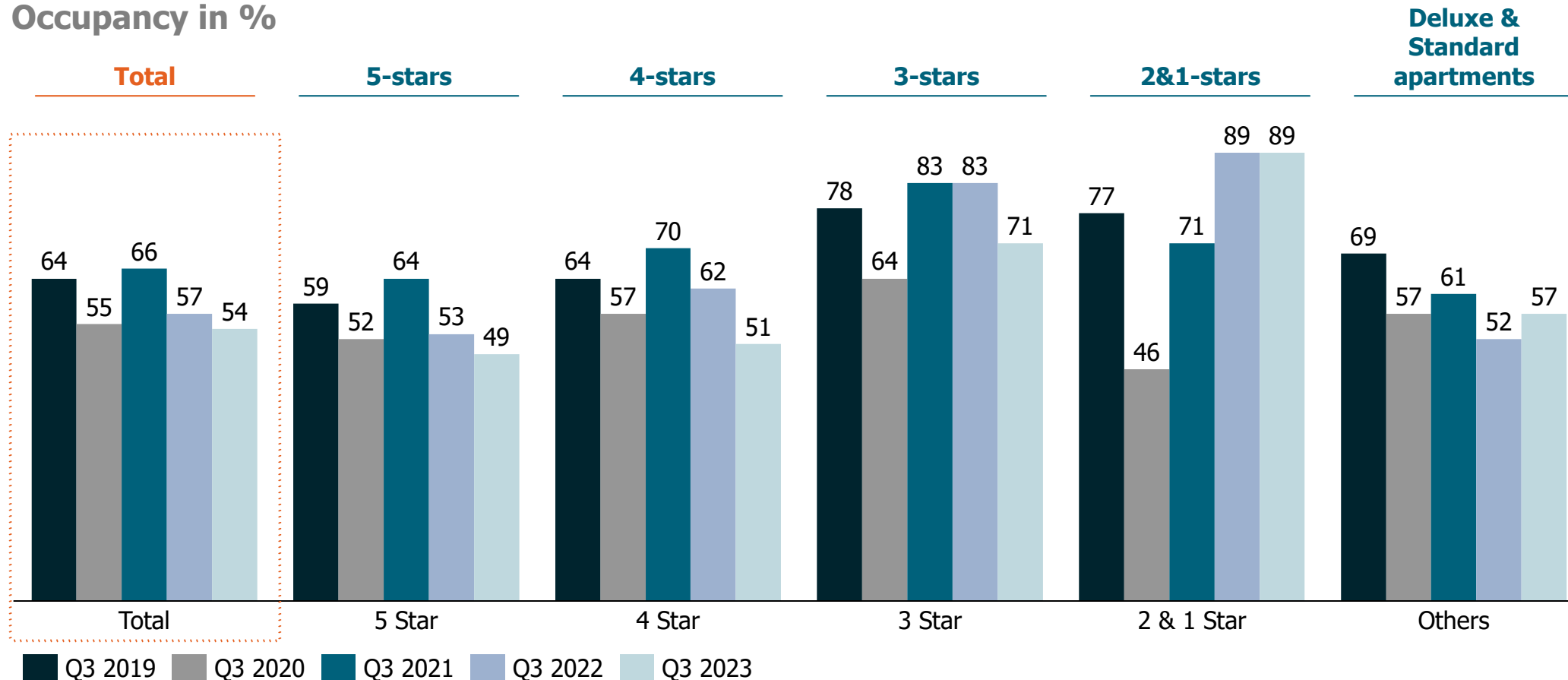
54%
2023

Properties that have been utilized as quarantine/Covid - 19 response facilities are included in the calculation
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Source : STR, Qatar Tourism

YoY OCCUPANCY DECLINES DURING THE SUMMER

Q3 2023 occupancy at 54%, 3 ppt less than Q3 2022, budget segments fare better

Occupancy in %

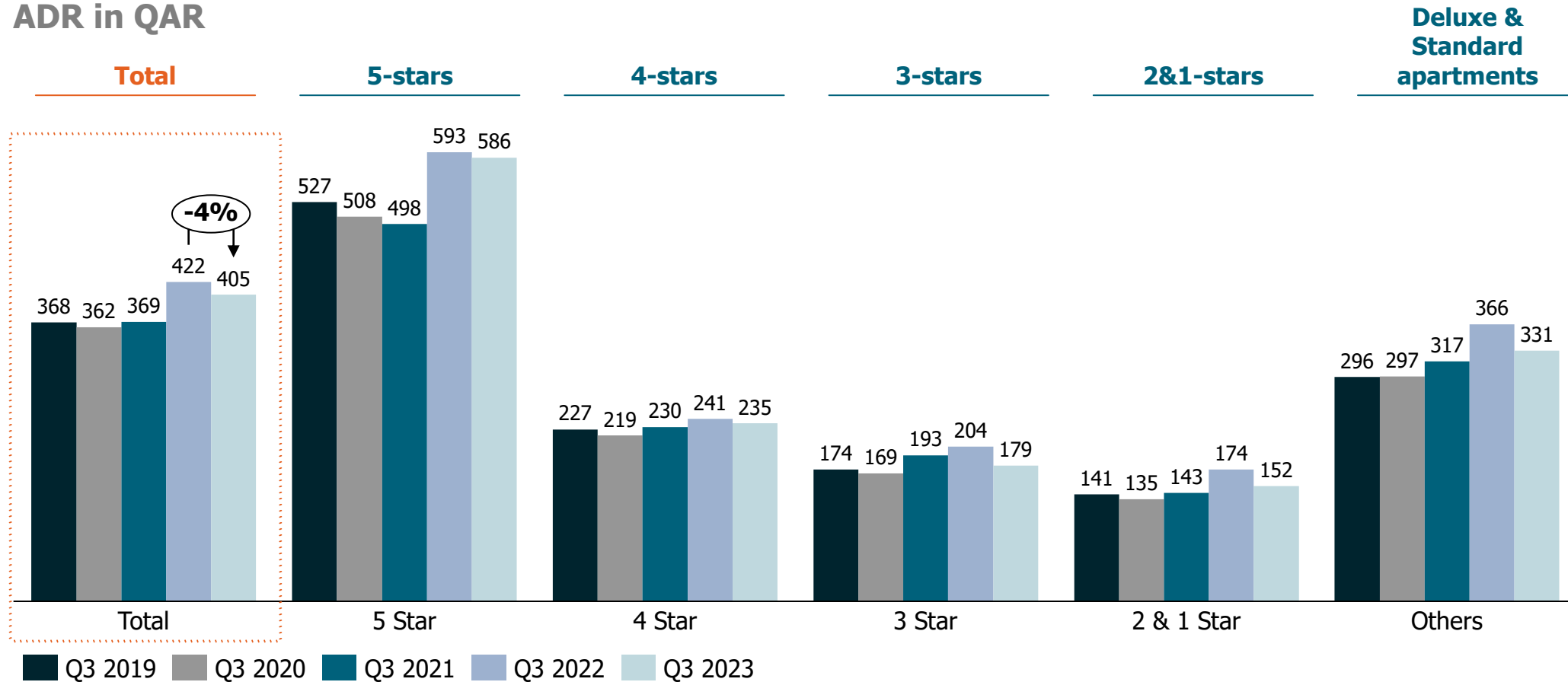


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OVERALL MARKET ADR REASONABLE STABLE

Decline in average daily room rate observed across all segments during the summer months

ADR in QAR

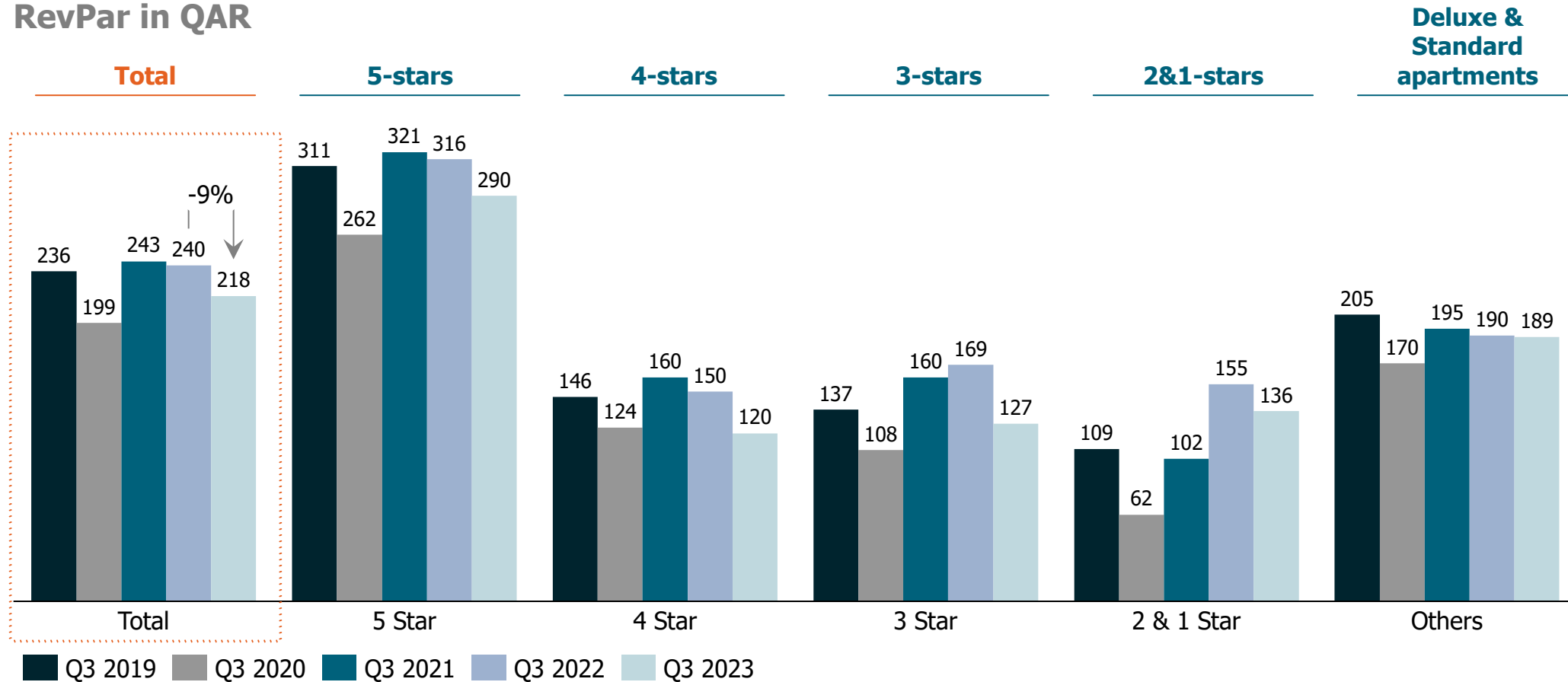


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OVERALL MARKET-LEVEL RevPAR DECLINED BY 9%

3 star properties continue to see highest decline, hotel apartments display least decline among star categories

RevPar in QAR



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Source : STR, Qatar Tourism

visit
QATAR

