



TOURISM SECTOR PERFORMANCE H1 2024

Published: July 23, 2024



EXECUTIVE SUMMARY



2639 k international visitors arrived in Qatar till June 2024

- Split of arrival mode for H1 2024: Air (51%), Land (40%) and Sea (9%)
- Saudi Arabia continues to be the top contributor to international arrivals for H1 2024 to Qatar with ~755 k visitors, constituting 29% of total visitors coming in by June of 2024.
- Remaining top 10 visitor markets were India (8%), Bahrain (5%), UK (4%), Kuwait (4%), Oman (4%), Germany (4%), USA (3%), U.A.E (3%), Italy (2%)
- International arrivals higher than H1 2023 by 28% with AFC being a major driver for growth



Room-night demand continues to soar in the first half of 2024 leading to increased occupancy

- Room nights grew in line with tourist arrivals - demand reached 4.9 M room-nights by H1 2024, 28% higher than H1 2023
- Room supply relatively flat at 39.8 k keys as of June 2024
- Key hotel industry metrics in 2023:
 - H1 Occupancy: 69% – up from 53% in H1 2023
 - H1 ADR : 454 QAR – 7% above H1 2023
 - H1 RevPAR : 312 QAR – up by 37% vs. H1 2023

QATAR CROSSED 2.6 MILLION INT. VISITORS IN H1 2024



Highlights

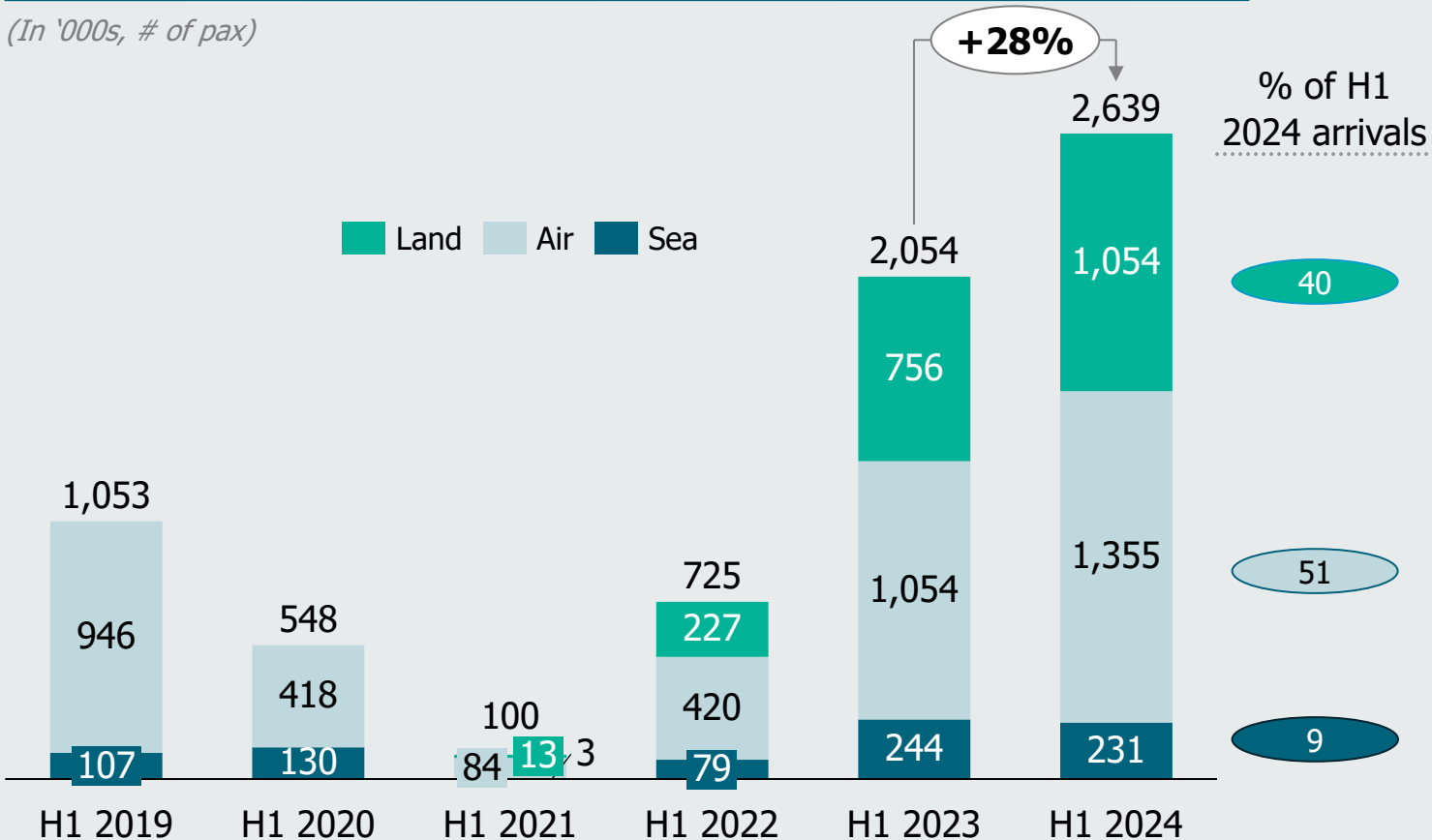
International visitors in H1 2024:

- H1 arrivals are up from last year by 28%
- Saudi Arabia continues to be the top contributor to international arrivals for H1 2024 to Qatar with ~755 k visitors, contributing 29% of total international visitors



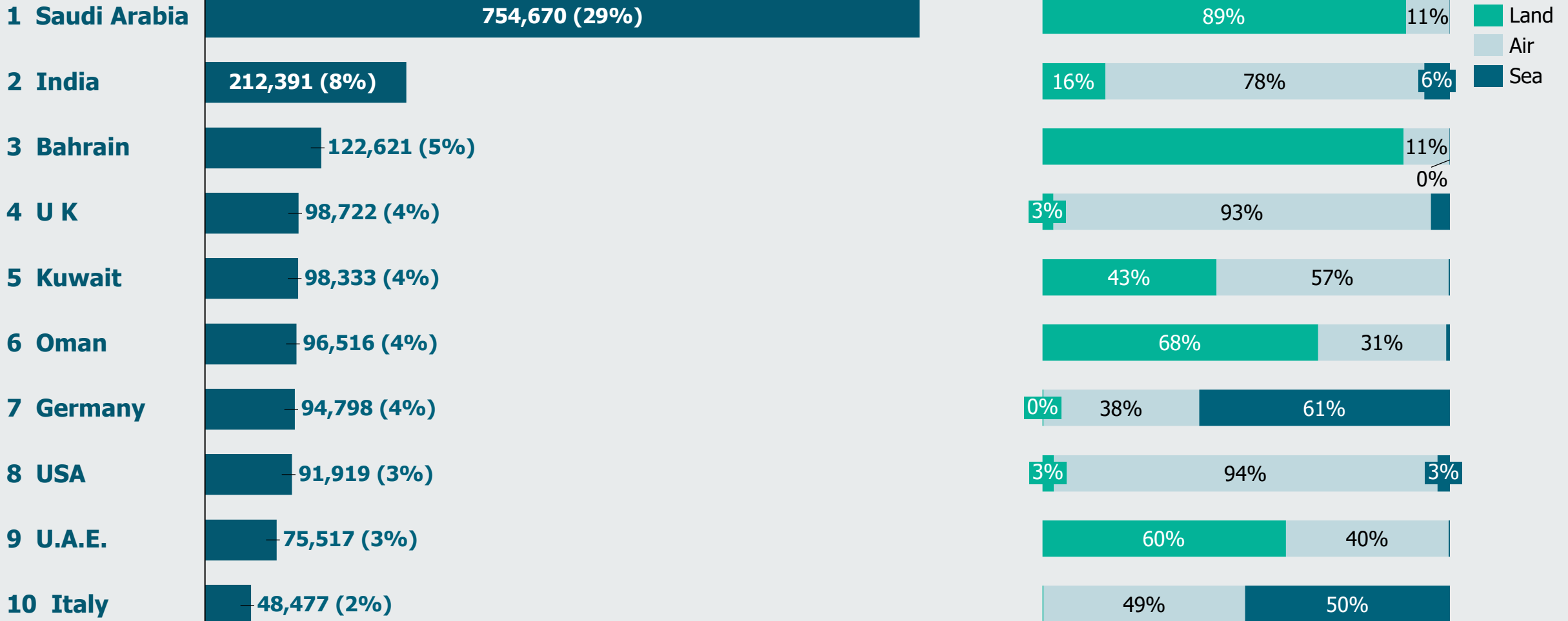
H1 performance across years

(In '000s, # of pax)



Source: Ministry of Interior, Qatar Tourism

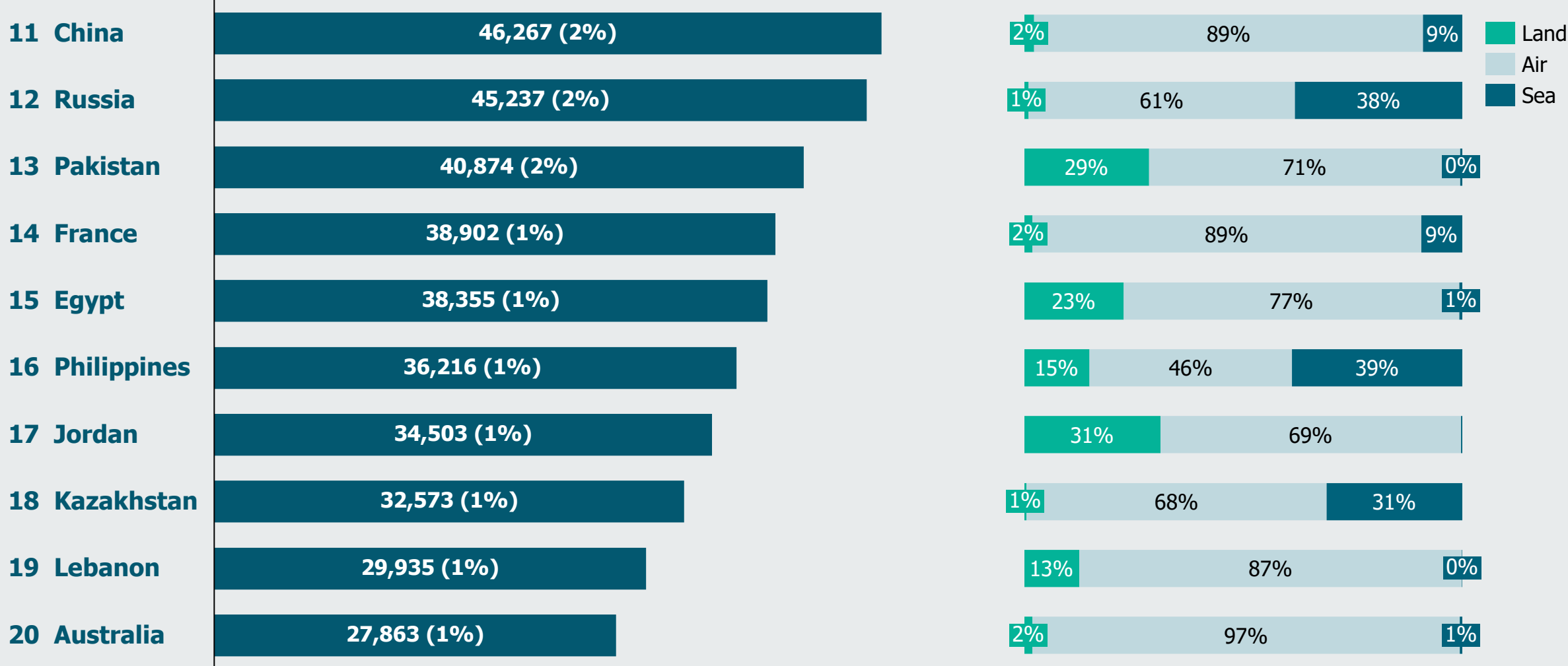
KSA HOLDS TOP SPOT WITH 29% OF H1 24 ARRIVALS



Source: Ministry of Interior, Qatar Tourism

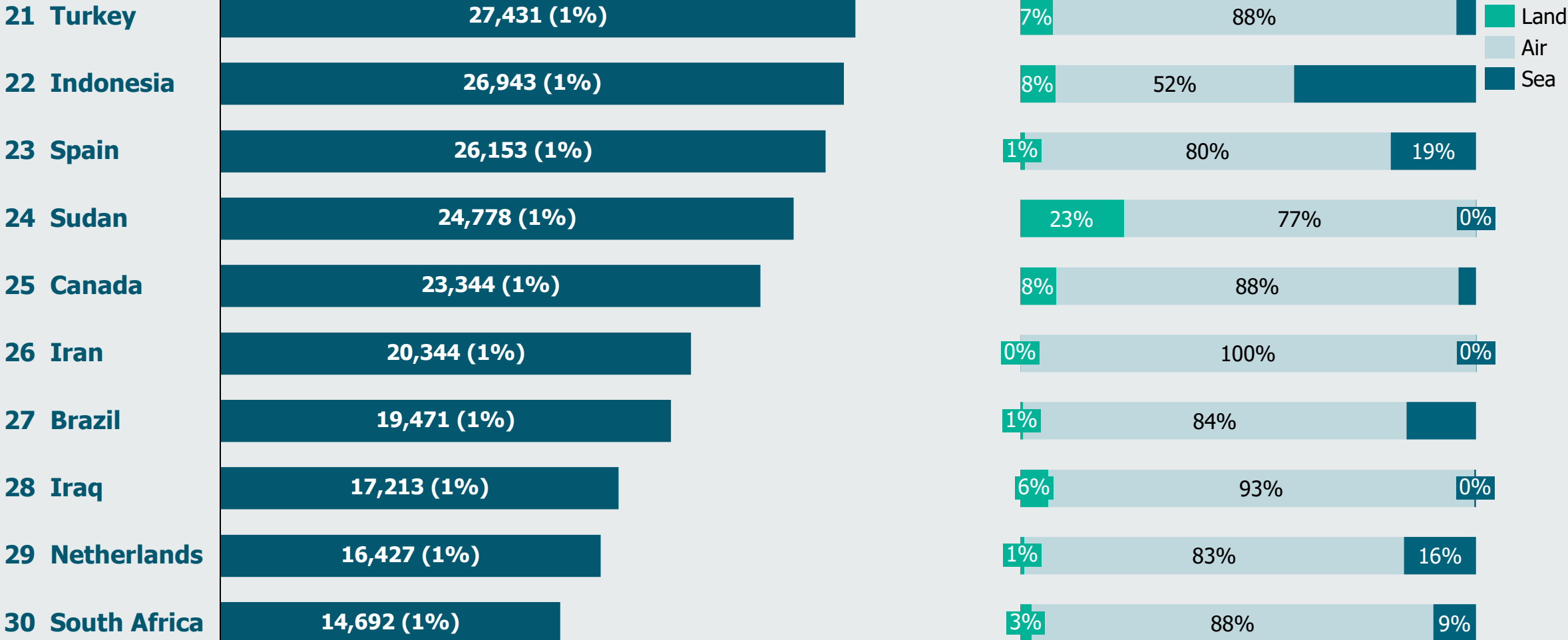
PRIVATE & CONFIDENTIAL

TOP 11-20 ARRIVALS COUNTRIES H1 2024



Source: Ministry of Interior, Qatar Tourism

TOP 21-30 ARRIVALS COUNTRIES H1 2024

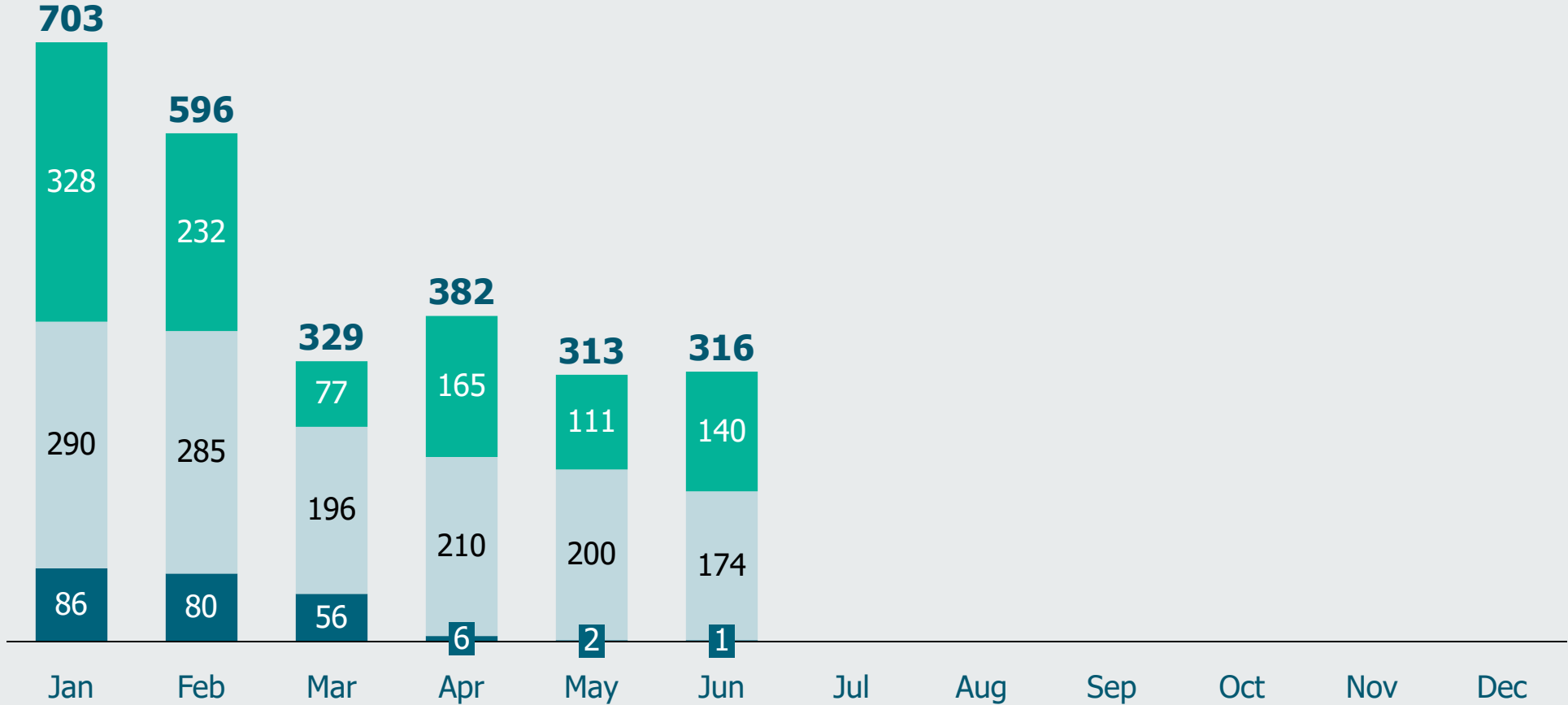


Source: Ministry of Interior, Qatar Tourism

JANUARY 2024 RECORDED THE HIGHEST MONTHLY ARRIVALS EVER AT ~703 K

(In '000s, # of int. visitors) in 2024

Land Air Sea



Source: Ministry of Interior, Qatar Tourism

GCC CONTRIBUTION STANDS AT 43% OF ARRIVALS

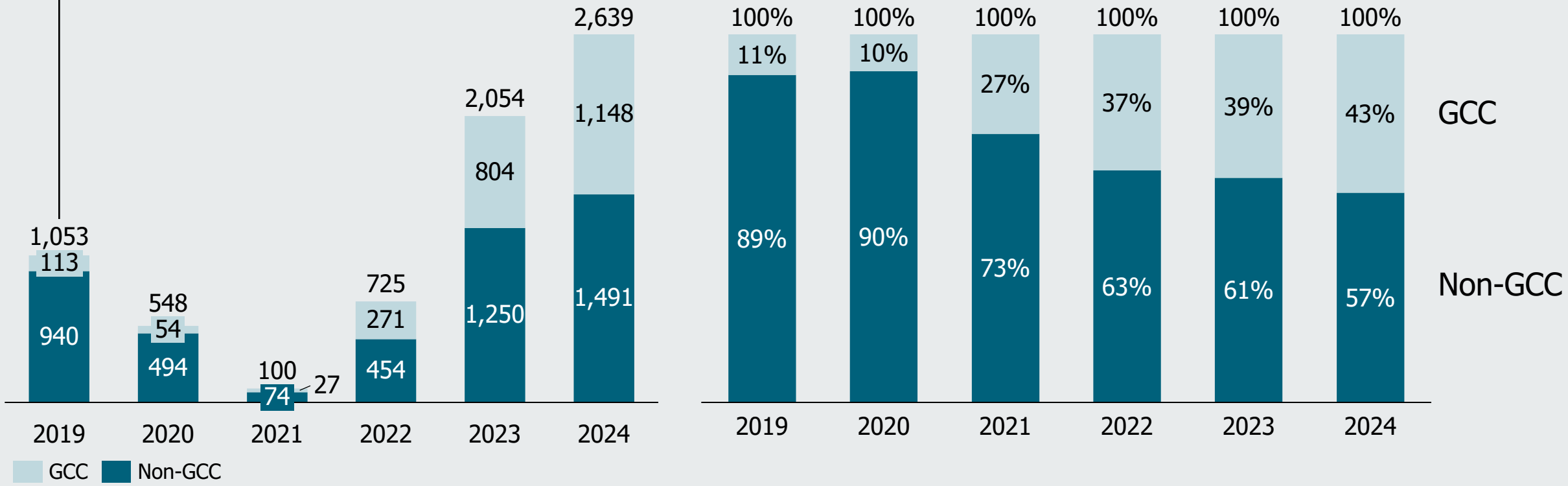


H1 2024 performance by GCC vs. Non-GCC Countries

(In '000s, # of pax)

+151%

(In % contribution)

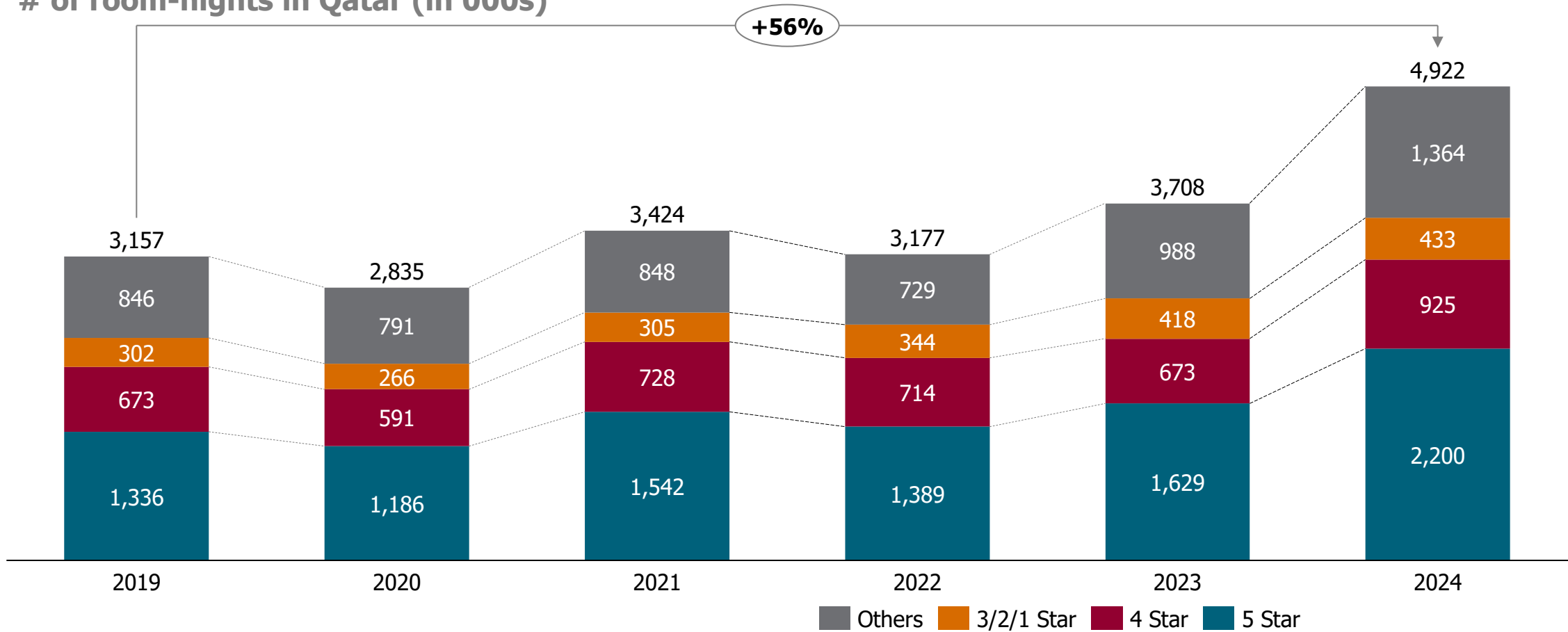


Source: Ministry of Interior, Qatar Tourism

ROOM-NIGHT DEMAND HITS RECORD HIGH OF 4.9 M

Highest demand ever by the end of H1 2024, 56% above pre-pandemic levels (2019)

of room-nights in Qatar (in 000s)

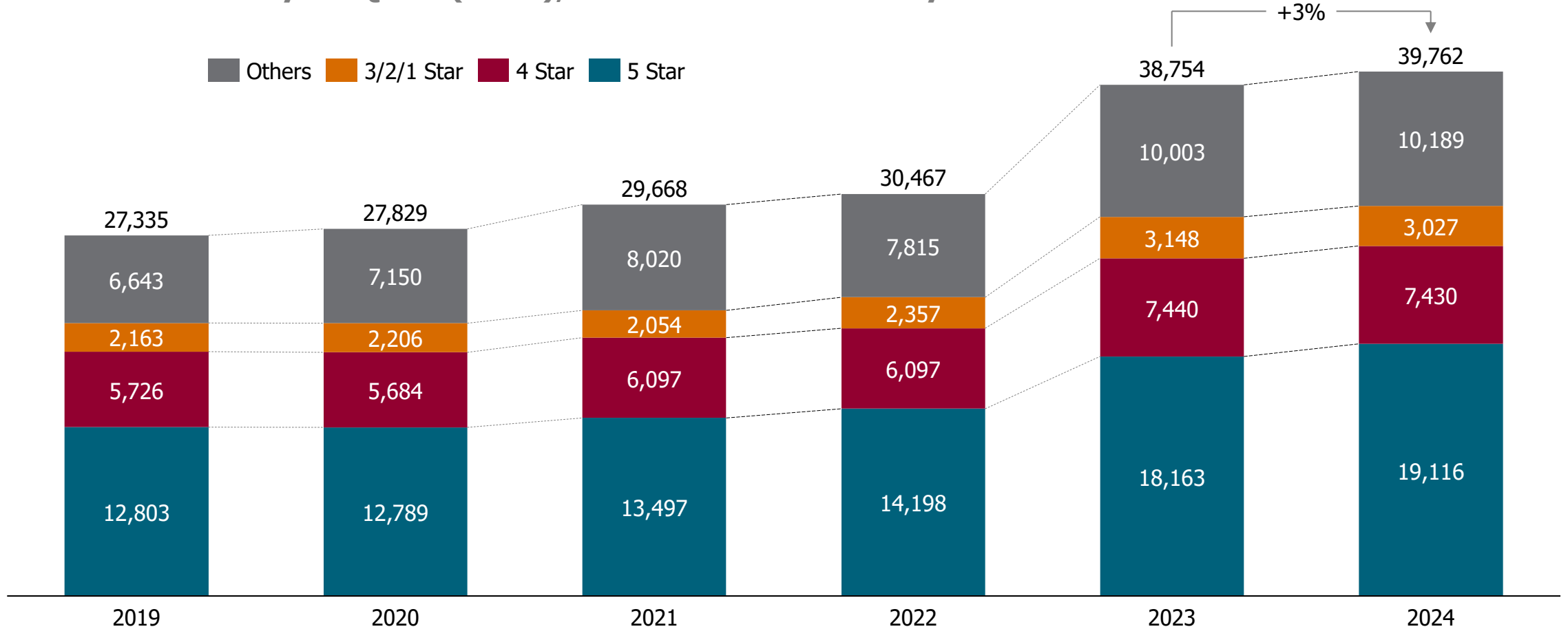


Properties that have been utilized as quarantine/Covid - 19 response facilities are included in the calculation
Category 'Others' includes deluxe and standard hotel apartments, and excludes serviced apartments
Source: STR, Qatar Tourism

ROOM SUPPLY GROWTH SLOWED DOWN TO 3%

Overall permanent supply grew by 3% to 39.8 k keys (June 2024) from 38.8 k keys by H1 2023

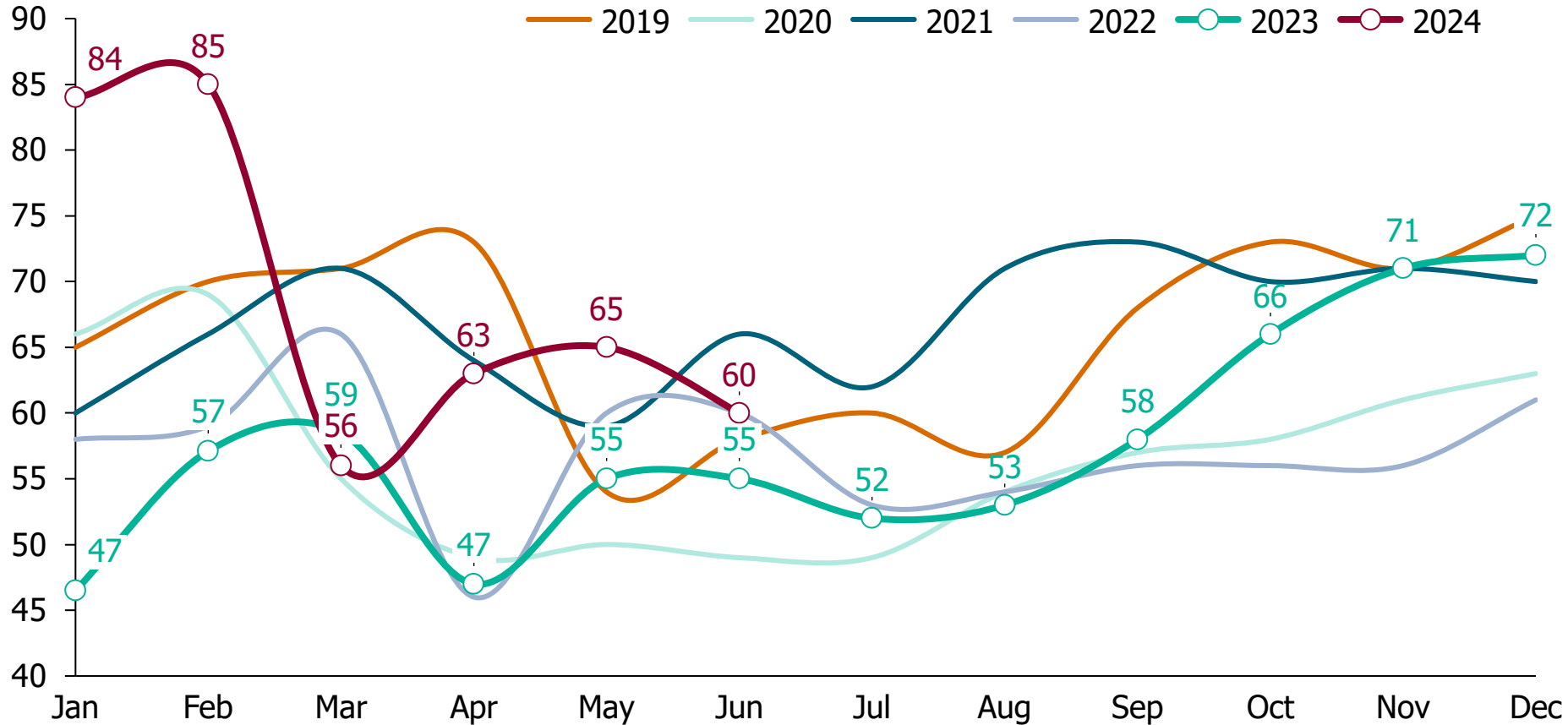
of hotel room-keys in Qatar ('000s); as on June 30th of each year



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

FULL-MARKET YTD OCCUPANCY FOR H1 2024: 69%

Monthly occupancy rates dropped to 60% in June 2024



H1 2019-2024

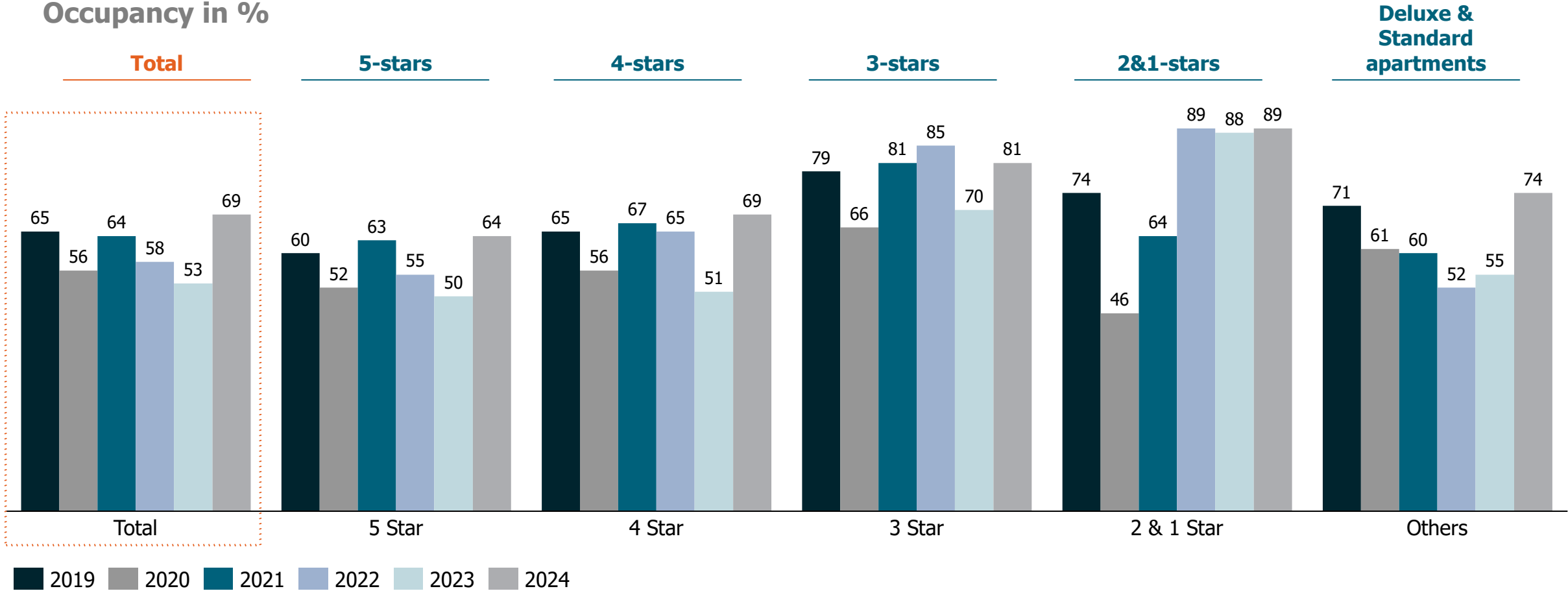
- 65% 2019
- 56% 2020
- 64% 2021
- 58% 2022
- 53% 2023
- 69% 2024

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

OVERALL OCCUPANCY +16% POINTS ABOVE H1 2023

Occupancy highest in last 6 years in all segments except 3-star category

Occupancy in %

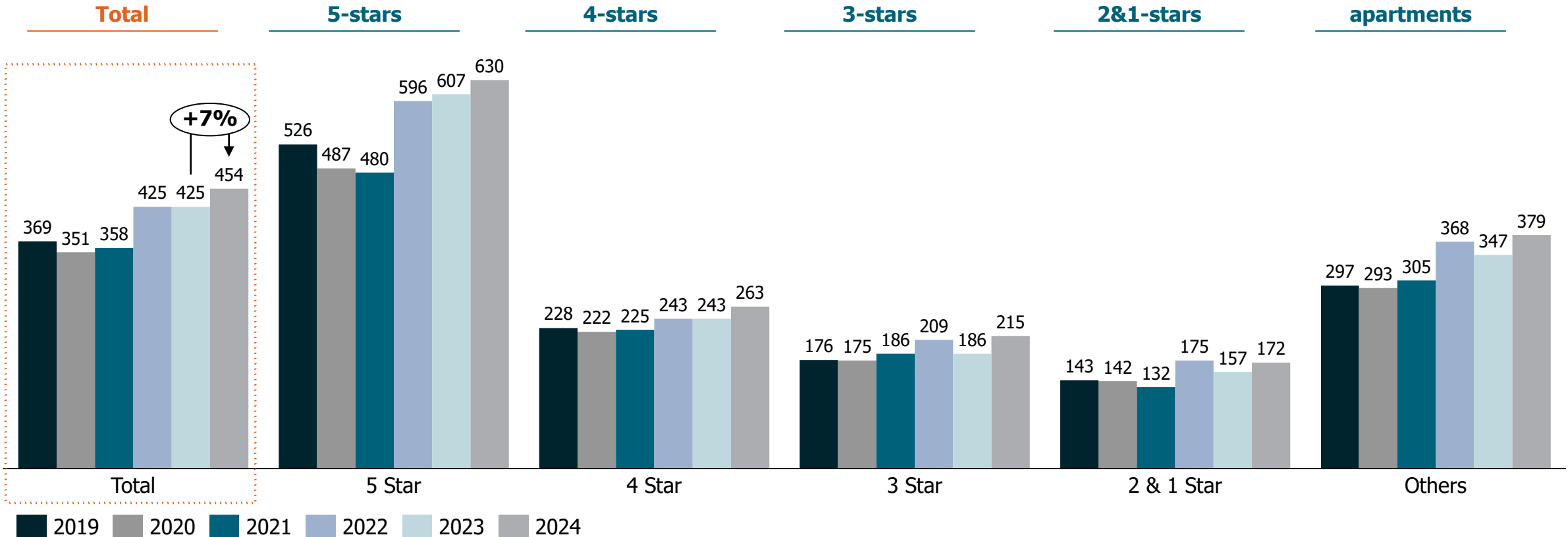


Properties that have been utilized as quarantine/Covid - 19 response facilities are included in the calculation
 Category 'Others' includes deluxe and standard hotel apartments, and excludes serviced apartments
 Source: STR, Qatar Tourism

OVERALL MARKET ADR 7% ABOVE H1 2023

All categories apart from the budget category of 1 & 2 star has highest RevPAR in last 6 years

ADR in QAR

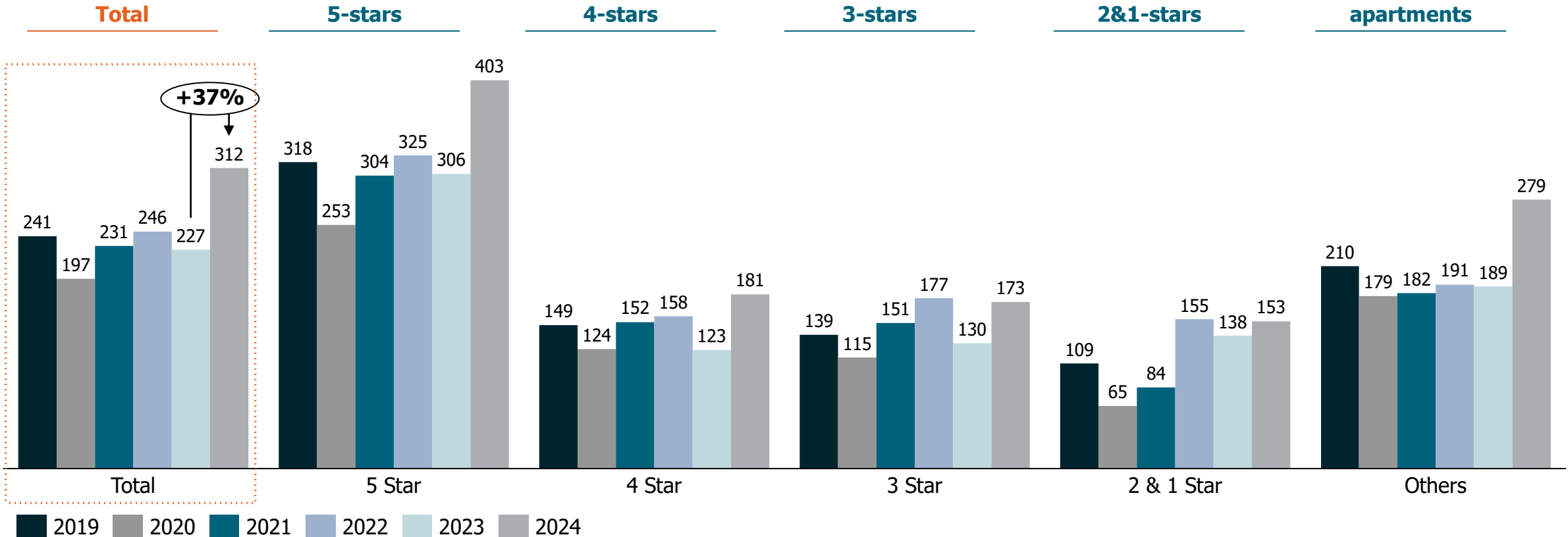


Properties that have been utilized as quarantine/Covid - 19 response facilities are included in the calculation
 Category 'Others' includes deluxe and standard hotel apartments, and excludes serviced apartments
 Source: STR, Qatar Tourism

OVERALL MARKET REVPAR 37% ABOVE H1 2023

All categories with the exception of 3-star and 1&2-star have the highest RevPAR in last 6 years

RevPar in QAR



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

visit
QATAR

