



# Annual Tourism Performance Report

December 2020

The year 2020 started strong for Qatar tourism, with a 33% increase in visitor arrivals in January and February, over 2019 levels.

However, due to the onset of the global COVID-19 pandemic and the resultant border closures that began in March, tourism was cut off for the remainder of the year.

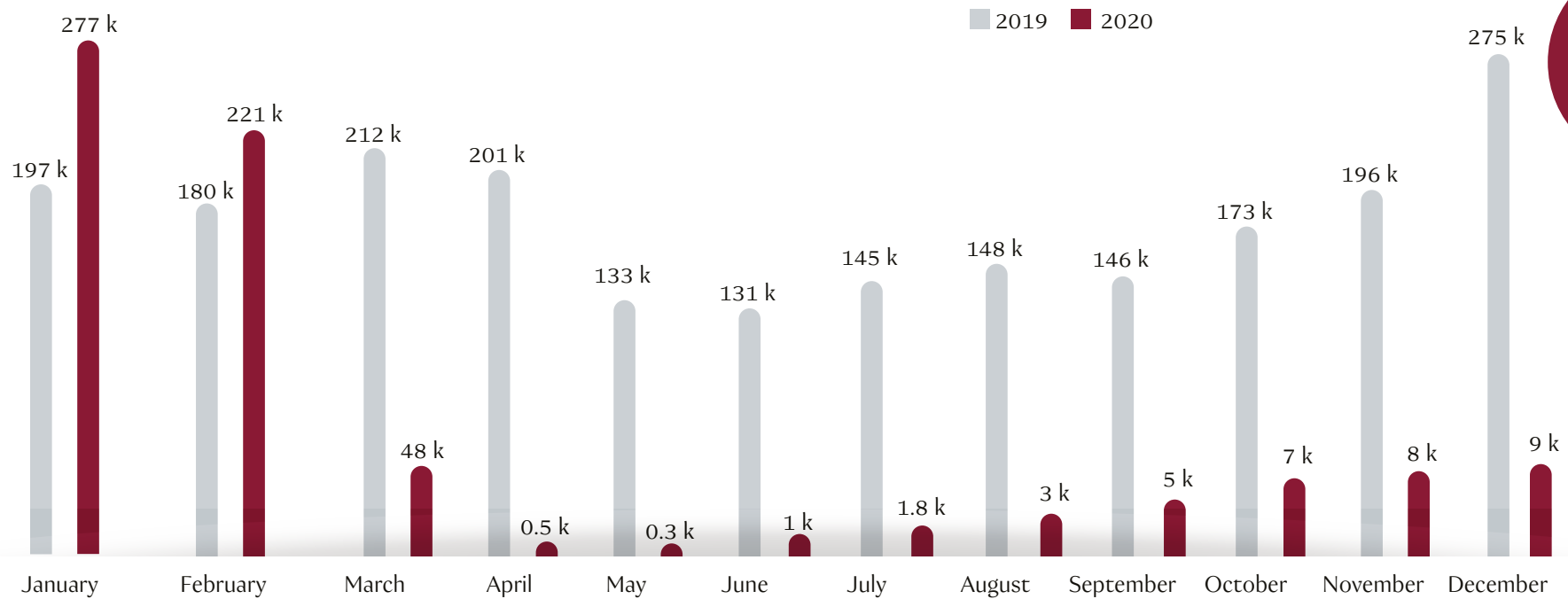
This led to an overall decline of 73% in visitor arrivals across 2020. Visitation declined among all markets, due to border closures and the necessary cancelation of the 2020/21 cruise season.

While overall occupancy rates declined by 18% and revenue per available room (RevPAR) by 22% in 2020, average room rates (ARR) remained close to 2019 levels, with a decline of only 4% on average across the year.

Despite the negative impacts of the pandemic, Qatar's hospitality sector fared exceptionally well compared to global benchmarks. Doha had the 6th highest occupancy rate worldwide in 2020, and the smallest decline in RevPAR among all key global cities

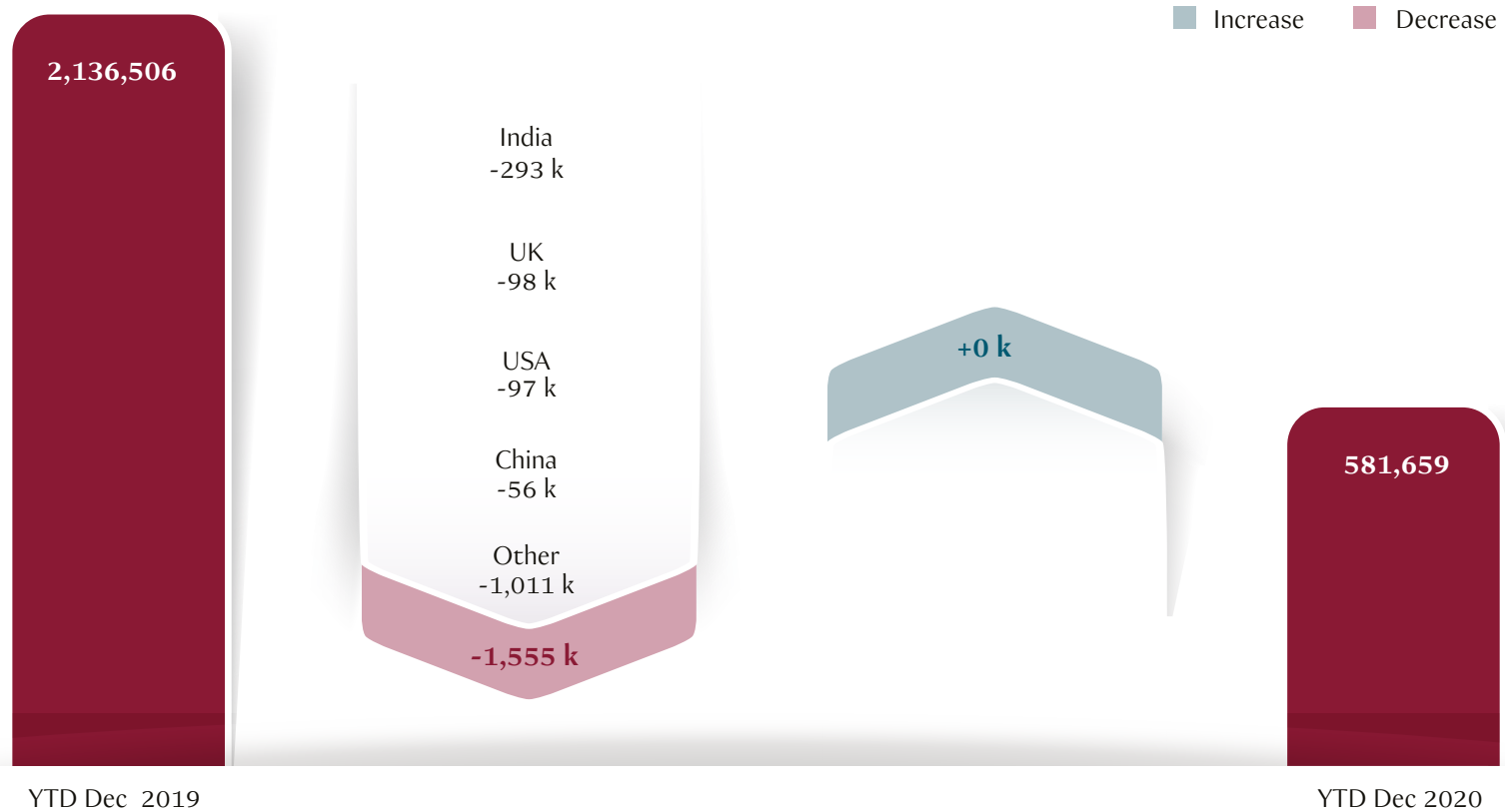
## Arrivals by month 2020 vs. 2019

“Visitor arrivals increased by 41% in January and 23% in February, but Qatar’s borders were closed to visitors in March, with the onset of the global COVID-19 pandemic, leading to an overall 73% decline in visitation across all of 2020. Although some visitation returned in Q4, due to limited event program permissions, visitation, on the whole, remained virtually non-existent.”

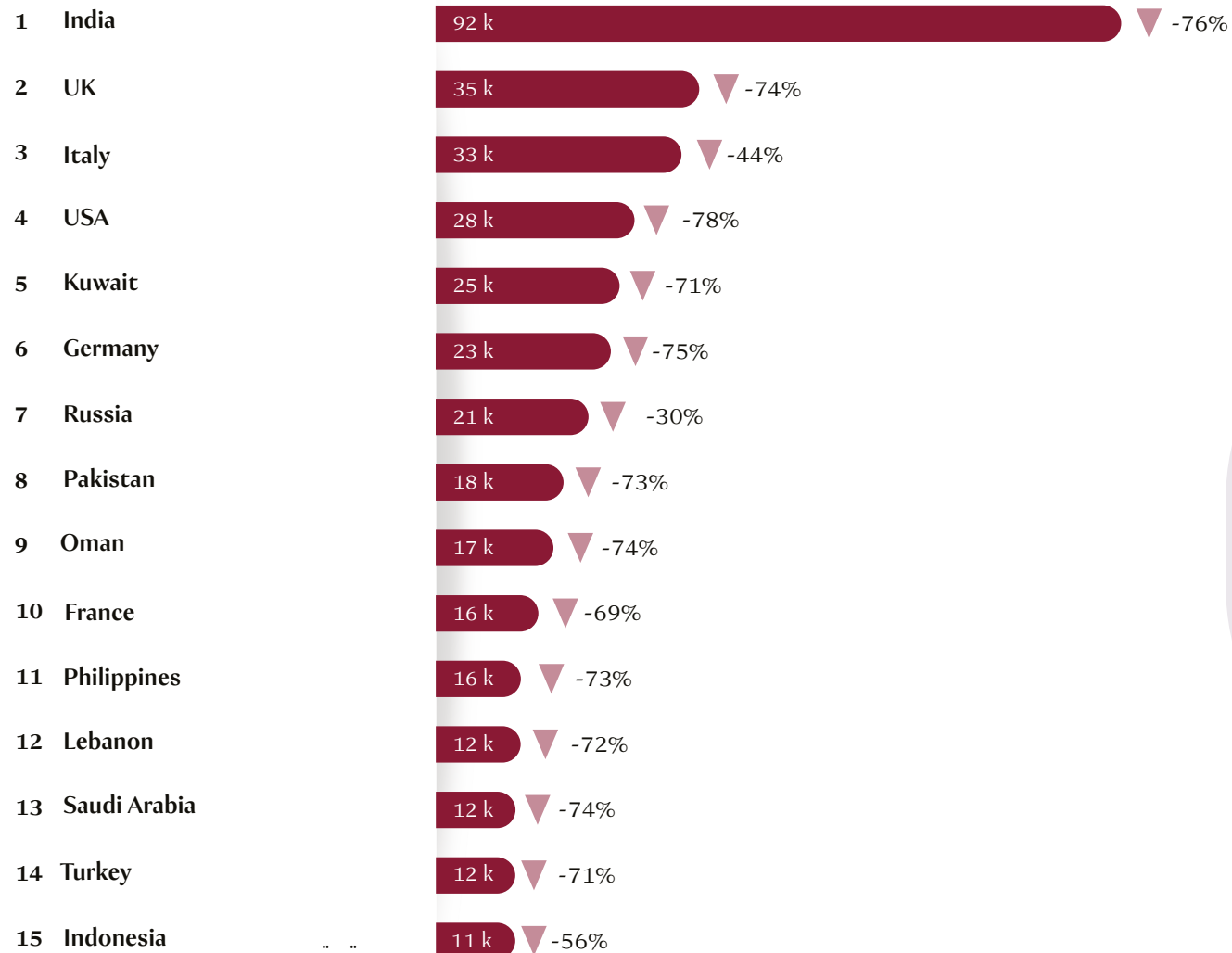


# Visitor arrivals sources of change YTD Dec 2020

“Visitation across all nationalities declined in 2020 as a result of the pandemic-related border closures and the necessary cancelation of the 2020/21 cruise season. Despite very strong performance in January and February, no market or sector was able to achieve increases across 2020 in comparison 2019. ”



## Top 15 nationalities YTD Dec 2020\* vs. YTD Dec 2019

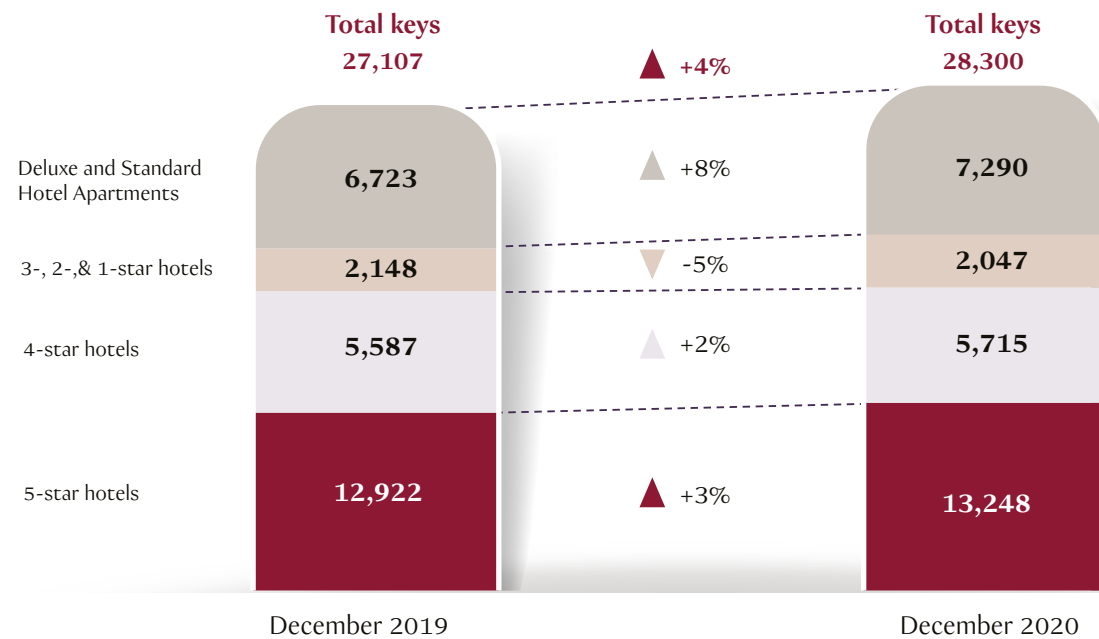


“ Across Qatar’s top 15 visitor arrival nationalities, the greatest declines in visitation were among Indian (-300 k), British and American (-100 k each) nationals. ”

\*Other nationalities YTD 2020: 211 k

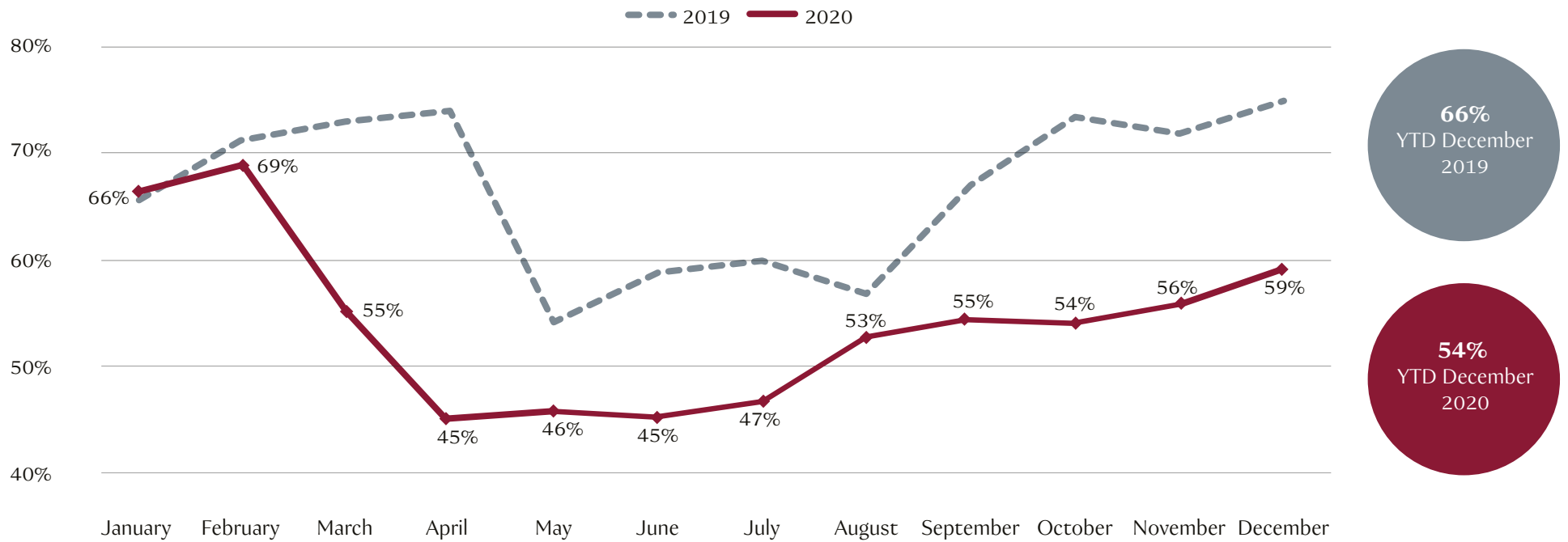
## Existing supply (Keys) Dec 2020 vs. Dec 2019

“The supply of room keys across Qatar’s hospitality sector has increased by 4% over 2020, in comparison to the end of 2019.”



# Full market\* occupancy rate 2020 vs. 2019

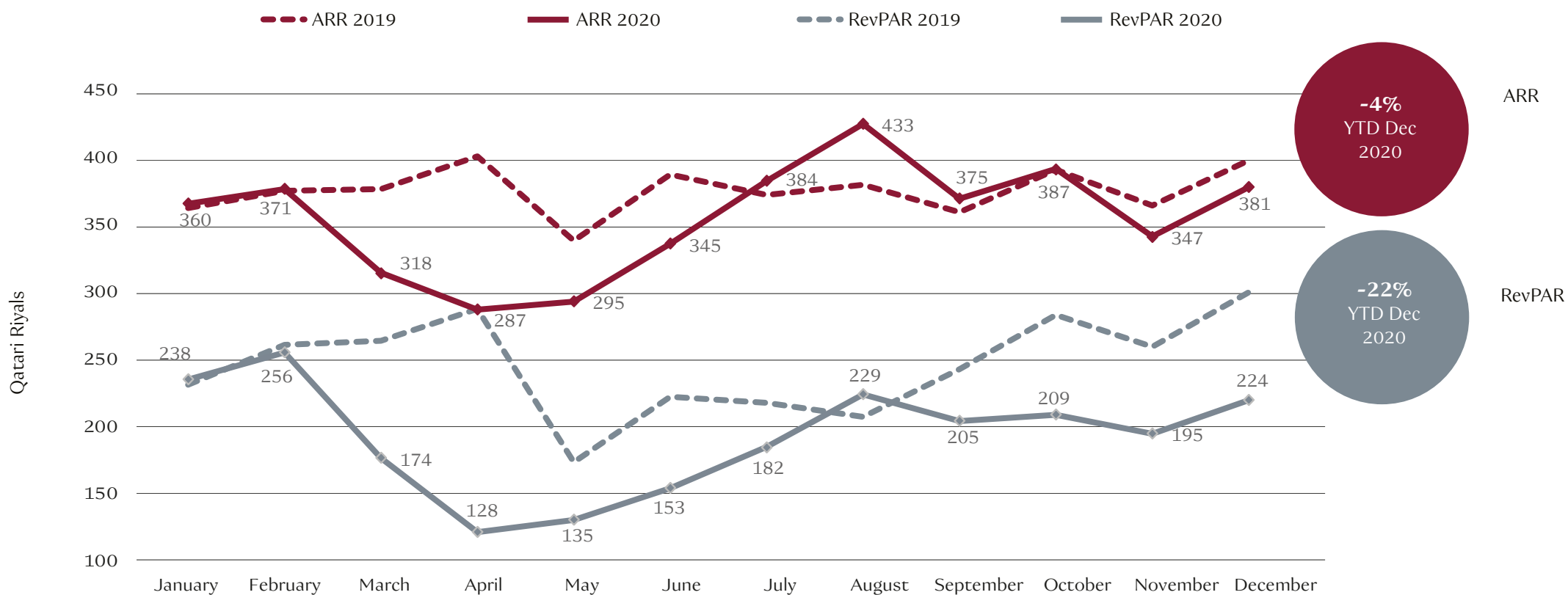
“Throughout Q4 2020, occupancy steadily increased, from 54% in October to 59% in December. Occupancy rates still remain significantly lower than in 2019 though, with an overall decline of 18% across the year.”



\*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 December.

# Full market\* ARR and RevPAR 2020 vs. 2019

“ARR and RevPAR remained fairly stable across Q4 2020, with ARR approaching 2019 levels. Year-to-date, ARR is only down 4%, but RevPAR is lagging further with a decline of 22%, in comparison to the end of 2019.”

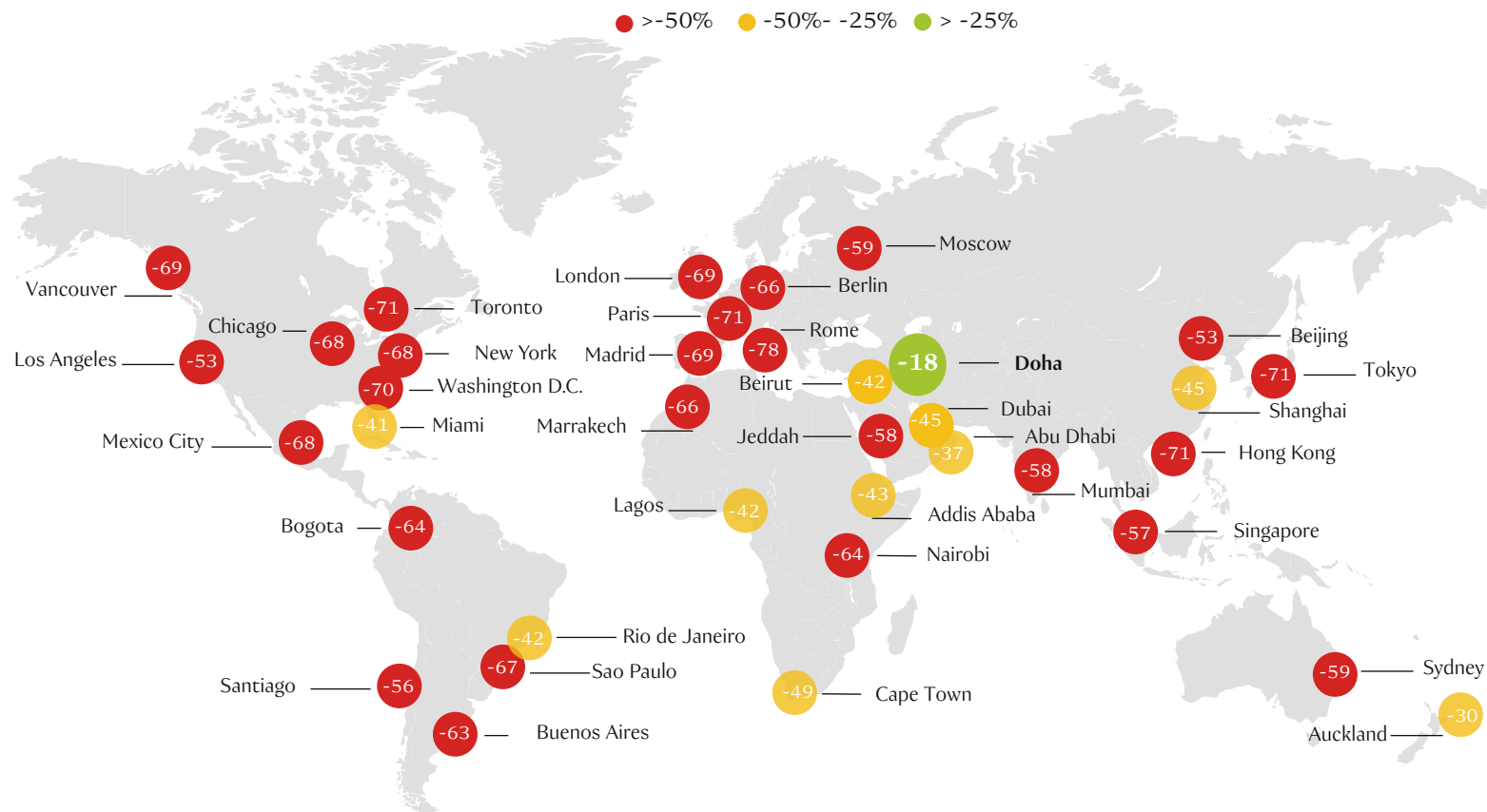


\*NOTE: Properties that have been leased or donated as quarantine/Covid-19 response facilities have been removed from the full market data set for the months of March through December.



# RevPAR % change in key cities globally 2020 vs. 2019

“ Despite the negative impacts of the pandemic, Qatar’s hospitality sector fared exceptionally well compared to global benchmarks. Doha had the 6th highest occupancy rate worldwide and the smallest RevPAR decline, by far, among all key cities in 2020 <sup>1</sup> ”



<sup>1</sup>RevPAR % change of -18% reported by STR differs from NTC RevPAR % change of -22% because the STR report includes all open hotels, while NTC excludes quarantine hotels, per UNWTO guidance to governments for tourism statistical reporting during the pandemic.

## Accommodation units (status as of 31 December 2020)

	Hotels		Hotel Apartments		Total	
	Keys	Rooms	Keys	Rooms	Keys	Rooms
5-Star	13,248	14,764	2,129	3,726	15,377	18,490
4-Star	5,715	6,702	4,644	5,295	10,359	11,997
3-Star	1,811	1,858	268	354	2,079	2,212
2-Star	236	236	88	88	324	324
1-Star	0	0	161	185	161	185
<b>Total</b>	<b>21,010</b>	<b>23,560</b>	<b>7,290</b>	<b>9,648</b>	<b>28,300</b>	<b>33,208</b>

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