

QUARTER 1 2015 TOURISM PERFORMANCE SUMMARY

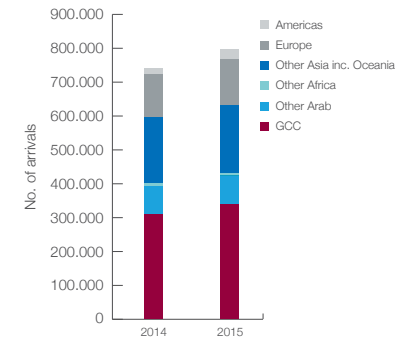
Qatar continued to welcome an ever-increasing number of foreign visitors in Quarter 1 (Q1) of 2015, with 11% more arrivals compared to the same period in 2014. Key performance indicators show a thriving tourist accommodation sector, with significant increases in both occupancy rates and revenue per available room across all hotels.

ARRIVALS BY REGION

In comparison to Q1 2014, arrivals from the Americas grew by 17%, from Europe by 9%, and from Other Asia by 7%. Arrivals from the GCC, Qatar's largest source market, grew markedly in Q1 2015, increasing by 16% compared to the same quarter of 2014. Arrivals from Other Arab and Other African nations remained roughly the same.

Arrivals to Qatar by Region, Q1 2015 vs Q1 2014			
	2014	2015	% change 2014-15
TOTAL	759,098	841,025	11%
GCC	310,507	361,660	16%
Other Arab	84,504	84,251	0%
Other Africa	8,328	8,238	-1%
Other Asia inc. Oceania	198,062	212,371	7%
Europe	120,451	131,056	9%
Americas	37,246	43,449	17%

ARRIVALS TO QATAR BY REGION, Q1 2015 VS Q1 2014



PERFORMANCE ACROSS QATAR'S SOURCE MARKETS

During Q1 2015, the overall growth of 16% from the GCC countries was primarily dominated by an increase in visitor arrivals from Saudi Arabia, which grew by 28% compared to Q1 2014. The majority of this growth took place in March, when Saudi visitor arrivals grew by 82% compared to March 2014. Visitor arrivals from other primary markets also showed growth in Q1, most notably from China (22%) U.S.A. (17%) and France (13%), when comparing to the same period in 2014.

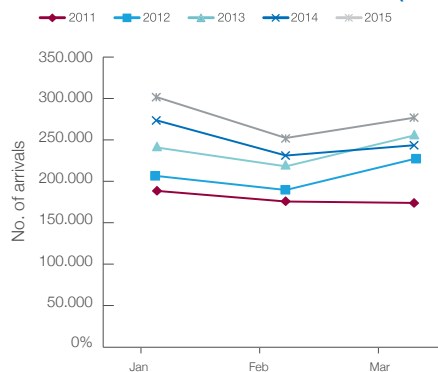
Arrivals to Qatar from the GCC, Q1 2015 vs Q1 2014			
	2014	2015	% change 2014-15
TOTAL	310,507	361,660	16%
Bahrain	33,157	33,648	1%
Kuwait	31,184	27,540	-12%
Oman	29,204	30,685	5%
Saudi Arabia	188,733	241,008	28%
U.A.E.	28,229	28,779	2%

Arrivals to Qatar from Non-GCC Primary Markets, Q1 2015 vs Q1 2014			
	2014	2015	% change 2014-15
TOTAL	205,018	218,251	6%
Australia	5,848	5,820	0%
Brazil	1,741	1,659	-5%
China	6,589	8,053	22%
France	12,606	14,307	13%
Germany	12,286	12,216	-1%
India	102,499	107,262	5%
Russia	1,596	1,561	-2%
U.K.	37,789	39,270	4%
U.S.A.	24,064	28,103	17%

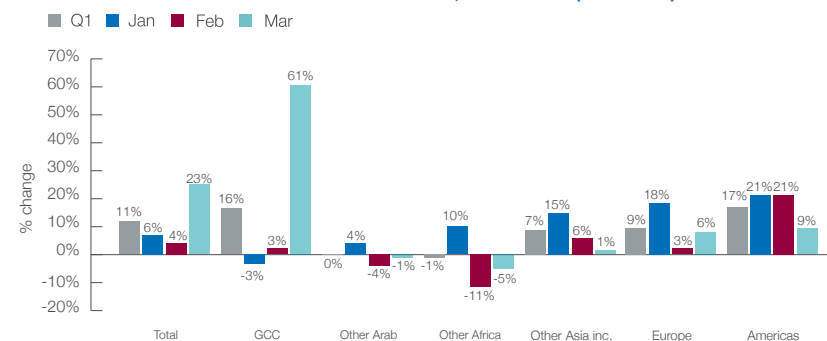
ARRIVALS MONTH-BY-MONTH

Monthly arrivals to Qatar during Q1 2015 align with previous years' trends, where arrivals are high in January, dipping slightly in February, and rebounding in March. Looking at month-by-month arrival patterns at a regional level shows particularly strong performance by GCC countries in March 2015 compared to March 2014. This was almost exclusively driven by a large influx of arrivals from Saudi Arabia, making March 2015 Qatar's busiest month for tourist arrivals ever.

ARRIVALS TO QATAR IN Q1 BY MONTH (2011-2015)



ARRIVALS TO QATAR BY REGION BY MONTH, % CHANGE (2014-2015)



ACCOMMODATION SECTOR PERFORMANCE

Data for Qatar's tourist accommodation stock now covers 100% of licensed hotels and hotel apartments in the country. For the first quarter of 2015 as a whole, all segments performed well, with only 5-star hotels and Deluxe Apartments collectively reporting occupancy rates slightly below 80%.

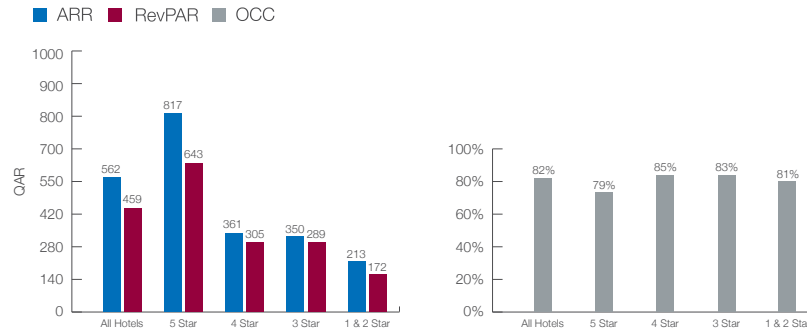
All
All Hotels
All Hotel Apartments
5 Star
4 Star
3 Star
1 & 2 Star
Deluxe Apartment
Standard Apartment

Accommodation Sector Summary Performance Indicators, Q1 2015 by Month												
Occupancy Rate (Occ.)				Average Room Rate (ARR)				Revenue Per Available Room (RevPAR)				
Jan	Feb	Mar	Q1 Total	Jan	Feb	Mar	Q1 Total	Jan	Feb	Mar	Q1 Total	
85%	79%	81%	81%	555	546	566	556	469	430	459	453	
85%	79%	81%	82%	560	552	573	562	474	436	464	459	
84%	77%	80%	80%	501	486	508	499	422	375	404	401	
81%	76%	78%	79%	816	804	830	817	665	613	650	643	
88%	82%	84%	85%	360	354	367	361	317	289	308	305	
85%	80%	82%	83%	369	323	354	350	315	259	291	289	
82%	79%	81%	81%	217	207	214	213	178	164	174	172	
81%	73%	75%	76%	575	561	593	577	469	408	444	441	
90%	88%	91%	90%	339	335	335	336	306	296	306	303	

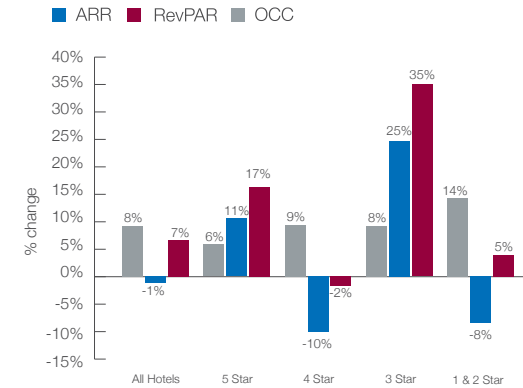
HOTEL PERFORMANCE

Occupancy rates across all hotels reached 82% in Q1 2015, up 8% in comparison to the same period last year. At the same time, average room rates dropped slightly (by 1%), primarily driven by drops in 4-, 2- and 1-star hotels.

OCCUPANCY RATE, ARR, AND REVPAR BY HOTEL CLASSIFICATION, Q1 2015



OCCUPANCY RATE, ARR, AND REVPAR, % CHANGE Q1 2015 VS Q1 2014 BY HOTEL CLASSIFICATION



HOTEL APARTMENT PERFORMANCE

In January 2015, QTA began collecting performance statistics from hotel apartments for the first time. Q1 2015 hotel apartment data shows strong performance, similar to hotel properties, with an average occupancy rate of 80% across all establishments.

OCCUPANCY RATE, ARR, AND REVPAR BY HOTEL APARTMENT CLASSIFICATION, Q1 2015

