

MID-YEAR 2015 TOURISM PERFORMANCE SUMMARY

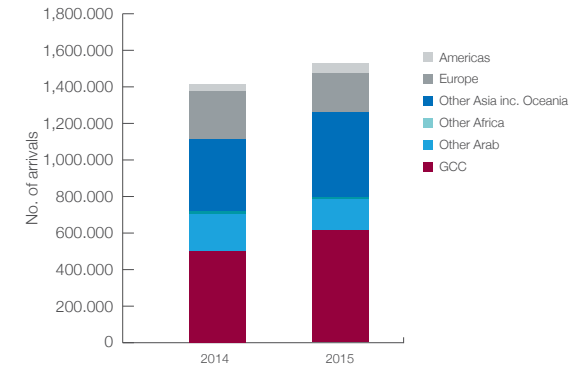
At mid-year 2015, key performance indicators show a thriving tourist accommodation sector. Qatar welcomed 7% more foreign visitors in the first half of 2015, compared to the same period in 2014. This growth puts Qatar on the path to meeting a milestone of 3 million visitors in 2015.

ARRIVALS BY REGION

Arrivals from the GCC, Qatar's largest source market, grew substantially in the first six months of 2015, increasing by 16% as compared to the same period in 2014. From mid-year 2014 to mid-year 2015, arrivals from the Americas grew by 7%, from Europe by 2%, from Other Asia by 5%, and from Other Africa by 2%. Arrivals from Other Arab nations fell by 6%.

Arrivals to Qatar by Region, Jan-Jun 2015 vs Jan-Jun 2014			
	2014	2015	% change 2014-15
TOTAL	1,424,408	1,528,718	7%
GCC	536,264	622,322	16%
Other Arab	172,547	162,642	-6%
Other Africa	16,755	17,108	2%
Other Asia inc. Oceania	404,642	422,866	5%
Europe	222,730	227,225	2%
Americas	71,470	76,555	7%

ARRIVALS TO QATAR BY REGION, JAN-JUN 2015 VS JAN-JUN 2014



PERFORMANCE ACROSS QATAR'S SOURCE MARKETS

During the first half of 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 25% in the first six months of 2015 compared to the same period in 2014. The majority of this growth took place in March when visitor arrivals grew by 82% compared to March 2014.

Arrivals to Qatar from the GCC, Jan-Jun 2015 vs Jan-Jun 2014			
	2014	2015	% change 2014-15
TOTAL	536,264	622,322	16%
Bahrain	63,033	63,911	1%
Kuwait	46,767	46,298	-1%
Oman	52,878	53,096	0%
Saudi Arabia	324,697	406,654	25%
U.A.E.	48,889	52,363	7%

Arrivals to Qatar from Non-GCC Primary Markets, Jan-Jun 2015 vs Jan-Jun 2014			
	2014	2015	% change 2014-15
TOTAL	408,947	418,086	2%
Australia	12,045	11,212	-7%
Brazil	3,086	2,873	-7%
China	14,740	15,797	7%
France	23,110	25,047	8%
Germany	21,539	20,308	-6%
India	211,548	218,652	3%
Russia	2,988	2,371	-21%
U.K.	72,877	71,776	-2%
U.S.A.	47,014	50,050	6%

Visitor arrivals from the U.A.E. also grew during the first half of 2015 (by 7%), while arrivals from Bahrain, Kuwait, and Oman essentially remained unchanged.

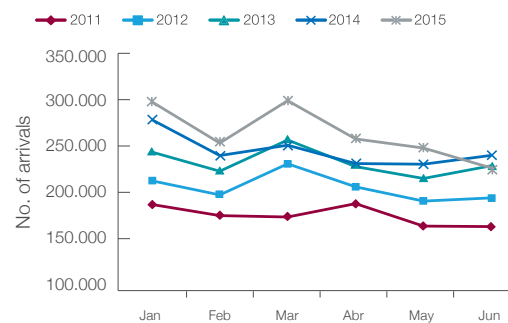
The largest growth in other primary markets, outside of the GCC, included arrivals from France (up 8%), China (up 7%) and the U.S.A. (up 6%).

ARRIVALS PATTERNS YEAR-TO-DATE

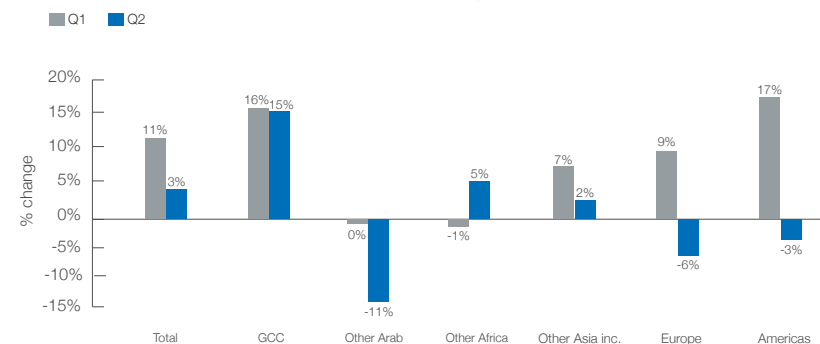
Monthly arrivals to Qatar during the first half of 2015 align with previous years' trends, whereby total arrivals are highest in the months of January and March. As typical, the timing of Ramadan, which this year began in mid-June (compared to late June last year), has had an impact on arrivals. June 2015 arrivals were 8% lower than in 2014 and 2% lower than in 2013.

Looking at arrivals by quarter shows that there was greater growth in Q1 (11%) than Q2 (3%). Visitors from the GCC and Other Asia regions grew across both quarters, in comparison to the same periods in 2014, whereas other regions such as the Americas, Europe, and Other Africa grew in one of the two quarters only.

MONTHLY ARRIVALS TO QATAR THROUGH MIDYEAR 2011-2015



ARRIVALS TO QATAR BY REGION BY QUARTER, % CHANGE 2014/15



Qatar's tourism accommodation sector continues to develop and expand. Since the start of 2015, 11 new hotels have opened their doors to guests, adding approximately 1,400 rooms in Qatar's tourism accommodation stock. The new properties include five 5-Star, one 4-Star, and five 3-Star hotels. An additional 13 properties with approximately 2,500 rooms are expected to come online before the year's end.

HOTEL AND HOTEL APARTMENT PERFORMANCE

Data for Qatar's tourist accommodation stock now covers 100% of licensed hotels and hotel apartments in the country. For the first half of 2015 as a whole, all segments performed well, with particularly strong performances in terms of occupancy by the 4-Star and Standard Apartment segments.

*Note: Q1 numbers may differ slightly than those reported in the Quarter 1 2015 Tourism Performance Summary as several properties have been reclassified and/or added or removed rooms since end of Q1.

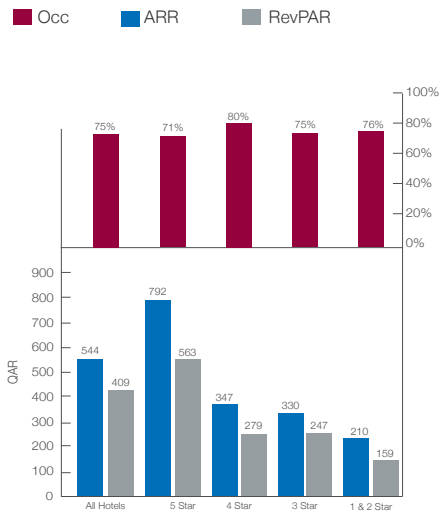
All
All Hotels
All Hotel Apartments
5 Star
4 Star
3 Star
1 & 2 Star
Deluxe Apartment
Standard Apartment

Accommodation Sector Summary Performance Indicators, YTD 2015 by Quarter									
	Occupancy (Occ)			Average Room Rate (ARR)			Revenue Per Available Room (RevPAR)		
	Q1	Q2	Total	Q1	Q2	Total	Q1	Q2	Total
All	81%	70%	75%	556	517	537	452	361	405
All Hotels	81%	69%	75%	562	523	544	457	362	409
All Hotel Apartments	80%	74%	77%	499	466	483	401	346	373
5 Star	78%	65%	71%	814	767	792	633	396	563
4 Star	85%	76%	80%	357	335	347	305	253	279
3 Star	83%	67%	75%	350	307	330	289	206	247
1 & 2 Star	81%	71%	76%	213	206	210	172	147	159
Deluxe Apartment	76%	71%	74%	577	530	554	441	374	408
Standard Apartment	90%	83%	87%	336	331	333	303	275	289

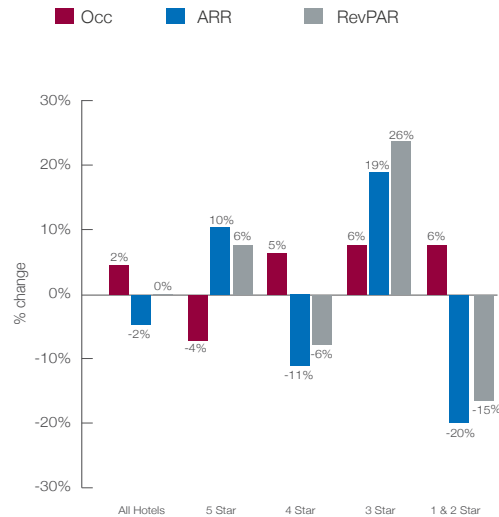
HOTEL PERFORMANCE

Occupancy rates across all hotels reached 75% for the first half of 2015, up 2% in comparison to the same period last year. At the same time, average room rates dropped slightly (by 2%), with drops in 4-, 2- and 1-Star hotels.

OCCUPANCY RATE, ARR, AND REVPAR BY HOTEL CLASSIFICATION, JAN-JUN 2015



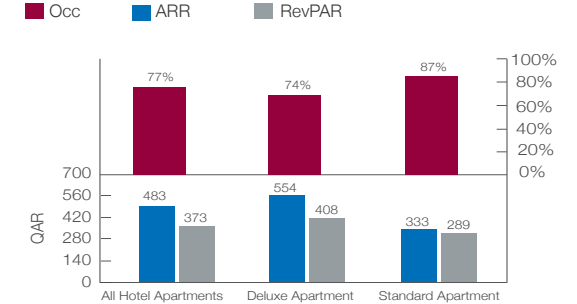
OCCUPANCY RATE, ARR, AND REVPAR, % CHANGE JAN-JUN 2015 VS JAN-JUN 2014 BY HOTEL CLASSIFICATION



HOTEL APARTMENT PERFORMANCE

QTA began collecting performance statistics from Hotel Apartments for the first time in January 2015. Hotel apartments data for the first six months of 2015 shows strong performance similar to hotel properties, with an average of 77% occupancy.

OCCUPANCY RATE, ARR, AND REVPAR BY HOTEL APARTMENT CLASSIFICATION, JAN-JUN 2015



AVERAGE LENGTH OF STAY

QTA has now accumulated six months' worth of data pertaining to the average length of stay of a hotel guest. Unsurprisingly, lengthier stays tend to occur within the Deluxe and Standard Hotel Apartments, while the shortest stays were observed in the 3-Star hotels.

AVERAGE LENGTH OF STAY BY HOTEL CLASSIFICATIONS, JAN-JUN 2015

